



Suruhanjaya Komunikasi dan Multimedia Malaysia
Malaysian Communications and Multimedia Commission

Summary Report

CONSUMER SATISFACTION SURVEY (CSS)
WAVE 6

October – November 2003

TABLE OF CONTENT

1. EXECUTIVE SUMMARY	1
1.1 Telecommunications Study.....	2
1.2 Media Study	2
1.3 Postal study	2
1.4 Courier study.....	2
2. WAVE 6 - SAMPLING AND METHODOLOGY	3
2.1 Telecommunications (Individual Study).....	3
2.2 Telecommunications (Commercial Study)	3
2.3 Media (Individual study)	4
2.4 Postal (Individual study)	4
2.5 Courier (Commercial Study)	4
3. SUMMARY - CONSUMER SATISFACTION INDEX.....	5
4. FINDINGS - TELECOMMUNICATIONS STUDY	7
4.1 Fixed Line Telephone - Individual Study.....	7
4.2 Mobile Telephone – Individual Study.....	7
4.3 Internet Access – Individual Study	8
4.4 Other Findings.....	9
4.5 Fixed Line - Commercial Study	9
4.6 Internet Access – Commercial Study.....	9
4.7 Other Findings.....	10
5. FINDINGS - BROADCASTING, POSTAL AND COURIER STUDY	11
5.1 Media Study	11
5.1 Postal Service – counter service.....	11
5.2 Courier Study	12
5.3 Other Findings.....	12
5.4 Areas for improvement.....	17

1. EXECUTIVE SUMMARY

A nation-wide independent survey was carried out in second half of 2003 to gauge levels of satisfaction on the various services provided by the communications and multimedia industry.

The survey measured perceptions of communications and multimedia services based on the experiences of the user. While perception can be influenced by personal prejudices, environment, hardware, publicity and advertising, these surveys were invaluable in highlighting areas for service improvement in respect of each service provider from a consumer's viewpoint.

Two surveys were conducted in 2001 through Taylor Nelson Sofres (TNS): Wave 1 (February-April) and Wave 2 (August-October). Results of the surveys were released in June and November respectively.

For year 2002, the MCMC carried out two CSS (Waves 3 and 4) through TNS and School of Communication and Media Studies, Universiti Kebangsaan Malaysia (UKM). The fourth survey covered September to October 2002 and the results were released in December 2002.

In 2003, two CSS (Waves 5 and 6) were conducted. TNS and UKM carried out the fifth survey which covered the period of April and June 2003. For Wave 6, the MCMC had engaged International Islamic University Malaysia Entrepreneurship & Consultancies Sdn Bhd (IIUM) to conduct the survey, together with UKM.

For Wave 6, UKM conducted the survey to gauge and review the general satisfaction level relating to radio and TV (free to air and satellite) broadcasts, postal and courier services. IIUM, on the other hand, conducted the survey to gauge and review the general consumer satisfaction level relating to mobile cellular services based on individual responses, fixed line telephone services and Internet access services based on individual and commercial responses.

CSS for Wave 6 covered four areas i.e. telecommunications, media, postal and courier service.

The CCS Wave 6 was completed in November 2003.

1.1 Telecommunications Study

Individual Study covered fixed line, mobile and internet service whereas commercial study covered fixed line and internet service. It also included understanding consumers' perception on other areas such as Emergency Calls, VoIP, Multimedia Messaging Service, GPRS, 3G and Mandatory Quality of Service.

In order to remain consistent thus enabling us to track the changes in the satisfaction levels and to obtain a trend in consumer satisfaction levels, the issues for the satisfaction index are to remain the same.

1.2 Media Study

The purpose of this study was to gauge consumer satisfaction with regard to services offered by the broadcasting industry. This study is a continuation of the five previous studies , no major change was made to the approach.

1.3 Postal study

The Wave 6 postal services study focused on Pos Malaysia services alone. Previously, postal and courier studies were studied together.

Therefore, Pos Laju (being basically a courier service) will now be surveyed together with the other courier service providers. This decision was made based on discussions with several courier and Pos Laju representatives.

This will enable Pos Laju performance to be benchmarked with other courier services companies.

With the exclusion of Pos Laju and courier services, the Wave 6 postal services consumer study will continue to assess Pos Malaysia counter service performance. In addition, the study will focus on other issues that are related to consumers' perception i.e Pos Malaysia's image, trustworthiness, quality of service, etc.

1.4 Courier study

The purpose of this study is to determine the Consumer Satisfaction Index (CSI) for the courier services. In the last three studies (Wave 3, 4 and 5), CSI for courier services was studied together with Pos Malaysia including that of Pos Laju.

In the previous studies, it was found that the usage of courier services amongst the general public was just slightly more than 30 percent. Most of the courier users are commercial customers. In the pre-survey discussions for Wave 6, it was suggested that in order to determine the CSI for the courier services, the emphasis should be given to the commercial sector rather than the general public.

Pos Laju will now be parked under this study. This has been suggested by Pos Malaysia representatives to enable them to see their own performance against other courier services providers. This will also be of interest to the MCMC and the industry to see their standing and performance.

2. WAVE 6 - SAMPLING AND METHODOLOGY

2.1 Telecommunications (Individual Study)

This study used random sampling method for the sample size of 2,000 nationwide (Wave 5 was 2,300) aged from 13 years old and above. The additional 300 (extra cost) was felt not justified as the results would not be significantly affected in Wave 6.

The field work was carried between 1st and 25th October 2003.

2.2 Telecommunications (Commercial Study)

A random sampling method was used to select 500 business units for the survey (Wave 5 used panel quota sampling).

Face-to-face interviews were conducted between the period of 1st and 25th October 2003.

The sample achieved through the random sampling (Wave 6) is as follows:

	W2 (Sept'01)	W3 (May'02)	W4 (Sept'02)	W5 (May'03)	W6 (Oct'03)
DIGI	99	99	100	100	0
Celcom	105	103	104	102	0
Maxis	108	105	103	102	4
Telekom Malaysia	106	109	115	123	478
TTdotCom	113	112	109	107	14

(Note: Wave 2 to 5 used panel quota sampling)

2.3 Media (Individual study)

Two methodologies were used in this study, a survey of 2,300 respondents and focus group interviews of 60 informants.

In the Wave 6 study, the sample size was increased to 2,300 from the previous study of 2,000 samples. The additional samples were to cater for the lower age group between 15-17 years old.

The focus group informants were identified from selected sampling blocks used in the survey.

Trained enumerators from Universiti Kebangsaan Malaysia conducted the fieldwork from 16 - 30 September 2003.

2.4 Postal (Individual study)

This study interviewed 2,000 household samples, which were selected randomly from 100 primary sampling blocks.

Two methodologies were used to collect data for the study.

- a. The survey questionnaires were used to collect the quantitative data, which is the basis for the calculation of consumer satisfaction index and consumer perception of the postal services.
- b. The focus group interviews of 12 groups, consisting of 5 informants in each group, were used to collect in-depth qualitative data. The qualitative data is used to further explain certain issues pertaining to the consumer perception of the postal services.

2.5 Courier (Commercial Study)

Data for the study was collected through interviews (survey).

- a. In the survey, a total of 500 samples were interviewed from 500 business establishments.
- b. The establishments were selected from 20 areas representing major cities and medium-size towns.

3. SUMMARY - CONSUMER SATISFACTION INDEX

	Wave 1	Wave 2	Wave 3	Wave 4	Wave 5	Wave 6
Telecommunications Industry – Individual Study						
Fixed Line						
Telekom	7.41	-	7.38	7.58	7.93	7.53
Public Payphone services	-	-	5.51	5.91	-	-
<i>(Scale 1 to 10)</i>						
Mobile						
Industry average	<i>7.10</i>	<i>6.95</i>	<i>7.30</i>	<i>7.36</i>	<i>7.85</i>	7.62
Celcom	6.75	6.97	7.01	7.38	8.06	7.71
Maxis	7.39	7.27	7.64	7.47	8.02	7.80
TM Touch	7.13	6.67	7.00	7.20	7.66	7.35
DiGi	6.96	6.56	7.31	7.35	7.63	7.48
TIMECel	-	6.28	6.77	6.73	7.37	7.46
<i>(Scale 1 to 10)</i>						
Internet Access						
Industry average	6.77	-	6.70	6.77	7.43	7.59
Jaring	7.40*	-	6.26	6.98	7.41	7.75
TM Net	6.62	-	6.82	6.74	7.44	7.55
<i>*small sample size (Scale 1 to 10)</i>						
Telecommunications Industry – Commercial Study						
Fixed Line						
Industry average	-	6.60	6.63	7.08	7.28	7.52
Telekom	-	6.81	6.91	7.43	7.57	7.54
TTdotCom	-	6.81	6.67	6.94	7.33	6.99
Maxis	-	6.63	6.93	7.04	7.19	7.69
DiGi	-	6.35	6.53	6.88	7.18	-
Celcom	-	6.35	6.09	7.09	7.10	-
<i>(Scale 1 to 10)</i>						
Internet Access						
Industry average	-	6.33	6.40	6.80	7.30	7.34
TM Net	-	6.41	6.42	6.75	7.29	7.31
Jaring	-	6.29	6.40	6.82	7.22	7.50
<i>(Scale 1 to 10)</i>						

	Wave 1	Wave 2	Wave 3	Wave 4	Wave 5	Wave 6
Media Industry – Individual Study						
Free to Air TV						
<i>Industry average</i>	-	-	3.37	3.78	3.89	3.80
NTV7	-	-	3.47	3.75	3.93	3.81
TV3	-	-	3.67	3.83	3.90	3.84
RTM 1	-	-	3.10	3.73	3.81	3.65
RTM 2	-	-	3.24	3.72	3.75	3.70
<i>(Scale 1 to 5)</i>						
Satellite TV						
Astro	-	-	3.73	3.67	3.87	3.79
<i>(Scale 1 to 5)</i>						
Radio						
<i>Industry average</i>	7.56	-	3.72	3.84	3.83	3.81
Radio 3 (RTM Malay)	7.54	-	3.81	3.95	3.94	3.85
Radio Muzik (RTM mix)	-	-	3.68	3.90	3.90	3.82
Radio 4 (RTM English)	-	-	3.66	3.69	3.89	
Radio 6 (RTM Tamil)	-	-	3.78	3.91	3.87	3.82
Time Highway Radio	-	-	3.63	3.81	3.87	3.81
Radio 5(RTM Chinese)	7.38	-	3.76	3.76	3.83	3.84
Era (Astro Malay)	7.86	-	3.67	3.83	3.81	3.77
MyFM (Astro Chinese)	7.40	-	3.80	3.80	3.79	3.83
HitzFM (Astro English)	7.39	-	3.68	3.79	3.79	3.83
Radio 1 (RTM Malay)	7.56	-	3.69	3.90	3.73	3.72
MixFm						3.69
Light and easy (Astro English)	-	-	3.69	3.61	3.67*	-
<i>(Scale 1 to 5)</i> <i>(Scale 1 to 10 in wave 1)</i> <i>*small sample</i>						
Postal Industry – Individual Study						
Pos Malaysia	-	-	3.33	3.47	3.72	-
Pos Malaysia – Counter service			-	-	3.67	3.71
Pos Malaysia – Pos Laju			-	-	3.76	3.80 *
<i>(Scale 1 to 5)</i> <i>* From the courier study.</i>						
Courier Services						
<i>Industry average</i>	-	-	3.89*	3.94*	4.01*	3.90
Domestic Courier	-	-	-	-	-	3.90
International Courier	-	-	-	-	-	3.93
<i>(Scale 1 to 5)</i> <i>(Individual Study)</i>						

4. FINDINGS - TELECOMMUNICATIONS STUDY

4.1 Fixed Line Telephone - Individual Study

Household fixed line telephone ownership among the respondents has increased to 74% as compared to Wave 5 which was at 56%.

Among households without fixed line telephone, 29% said that the house they are staying are not their home and 28% said they prefer to use mobile telephone, as reasons for not having fixed line telephone.

The intention to subscribe fixed line telephone in the next 6 months has increased from 23% (Wave 5) to 31%.

CSI for Telekom Malaysia decreased by 0.40 to 7.53 (7.93 in Wave 5).

4.2 Mobile Telephone – Individual Study

Household mobile telephone ownership among the respondents has also increased from 57% (Wave 5) to 69% (Wave 6). The ownership for respondent in rural areas has increased by 20%, from 37% (Wave 5) to 57% (Wave 6)

17% of respondents who did not have mobile telephone intended to subscribe to the service in the next three months, compared to 13% in Wave 5.

“Geographical coverage” is the main factor considered when selecting a mobile telephone service, echoed by 74% of the respondents.

Percentage of respondents using post paid service increased from 73% to 75%, citing “easier to control expenses” as the main reason at 75%.

Among the post paid users, the main reason for preferring the service is “convenience”, said 75% of the respondents using post paid service.

On perception on pricing, 76% percent of respondents perceived that the pricing is reasonable.

Only 3% of the pre paid users claimed that the top up/reload card/coupon are not easily available.

54% of respondents claimed to have received unsolicited SMS and 50% of them do not like it.

Only 40% know the correct emergency number for mobile telephone service.

The overall industry average CSI has declined from 7.85 to 7.62 and Maxis have the highest CSI score at 7.80.

Among the respondents that rated weak for the performance and did not make any complaints, 41% said that the reason for not complaining is tolerable, 24% said it is unnecessary and 16% said do not know how.

4.3 Internet Access – Individual Study

The personal computer's (PC) ownership among the household has increased from 19% in Wave 5 to 49%. 88% household owned only 1 PC, 11% household owned 2 PCs and only 1% household owned more than 2 PCs.

Among the non-owners, only 21% have the intention to purchase PC in the next three months.

The percentage of household that have internet connection has increased consistently from 48% (Wave 4), 49% (Wave 5) and 55% (Wave 6).

60% of all respondents used PC, and higher percentage of youths (aged 13-17) used PC, at 76% compared to 58% of respondents aged 18 and above.

66% used PC at home and 51% of the youths (aged 13-17) used them in internet café.

For non-users, 52% said that they do not have knowledge and 35% said they have no interest in using PC.

35% of respondents that use internet spend 1 to 3 hours on internet per week.

TMNet is the most subscribed internet service among the respondent, at 79%.

The overall score for the CSI has increased, from 7.43 (Wave 5) to 7.59 in Wave 6. Jaring has the highest score at 7.75 compared to TMNet, which is at 7.55.

Among the respondents that rated weak for the performance and did not make complaints, 55% said that the reason for not complaining is tolerable, 17% said it is unnecessary and 10% said they have no time or are busy.

4.4 Other Findings

4.4.1 Awareness of the MCMC

Only 27% of respondents are aware of the MCMC, out of which only 62% and 57% said they know MCMC from television and newspaper respectively. This is an increase from Wave 5 (23%).

4.5 Fixed Line - Commercial Study

The proportion of using more than 1 fixed line provider (FLP) has decreased. More than 1 FLP: 16% in Wave 2, 15% in Wave 3, 15% in Wave 4, 12% in Wave 5 and 8% in Wave 6.

83% of companies are unlikely to switch to other service providers. 71% of the companies are unwilling to change due to contentment with the current fixed line providers.

Similarly, 74% a total of 10 companies are unlikely to add another FLP to their current one in the next 3 months. Reason being, they are satisfied with their current service provider. For those companies that are likely to add another FLP it is due to expansion of business.

The CSI score for industry average has increased from 7.28 (Wave 5) to 7.52 in Wave 6. Maxis scored the highest at 7.69, followed by Telekom Malaysia at 7.54 and TT dotCom at 6.99. No samples were captured for Celcom and DiGi in the current study.

Among the respondents that rated weak for performance and did not make complaints, 39% said that the reason for not complaining is small matter or tolerable, and 21% said it is not necessary.

80% of companies perceived that they are getting value for money for the fixed line service subscribed.

4.6 Internet Access – Commercial Study

8 out of 10 companies are connected to the Internet. There is an increase in the use of Internet over the years. Over the last 4 studies, only 6 out of 10 companies have Internet connection; with PSTN being the main type of line used.

TM Net has replaced Jaring as the main Internet service provider.

Fewer companies are likely to switch or replace their current Internet Service Provider (ISP) in the next 3 months in Wave 6 because they are happy with their current ISP.

For those who are likely to switch, the main reason is that other ISPs provide better facilities and reliable network.

Fewer companies are unlikely to add another ISP to their current one in the next 3 months. Reason being, satisfied with the current service provider. For those companies that are likely to add another ISP are mainly due to getting better services and their business are expanding.

8 out of 10 companies still perceive Internet services offered value for money. For those who feel that they did not receive value for money for Internet services have many reasons. The reasons quoted are; poor network quality, expensive charges and poor services offered

CSI remain positive in Wave 6, at 7.34 compared to 7.30 in Wave 5. Jaring has the higher score at 7.50 and TMNet at 7.31.

4.7 Other Findings

4.7.1 VoIP

VoIP usage has gradually grown from 6% in Wave 2 to 12% in Wave 6. However, VoIP is still not widely used because the companies believe that there is no necessity to use VoIP services, in addition to lack of awareness, and knowledge of VoIP services.

VoIP is widely used for domestic calls. The satisfaction level of VoIP service is above average, while the call charges appear to be reasonable.

4.7.2 Digital Signature Certification

5 out of 10 companies know about Digital Signature Certification. This is an increase in its usage from 8% in Wave 5 to 20% in Wave 6.

4.7.3 E-Commerce

Currently, E-Commerce is used by less than 20% of the companies. It is mainly used for online transactions (buying and selling). However, the prospect of E-Commerce among non-users is encouraging. 4 out of 10 companies plan to participate in E-Commerce in the future.

The companies perceive E-commerce as a necessary element in business. E-Commerce is mainly used for local market.

4.7.4 The Mandatory Standard Quality of Service

Majority (82%) do not know about "The Mandatory Standard Quality of Service".

4.7.5 Awareness of the MCMC

47% of companies are currently aware of the MCMC but have limited knowledge of its functions.

5. FINDINGS - BROADCASTING, POSTAL AND COURIER STUDY

5.1 Media Study

There is an overall decline in the performance of television stations and radio stations as indicated by the CSI scores.

5.1.1 Free-to-air / Satellite televisions

There is overall decline in CSI score for all television stations compared to the Wave 5 study.

TV3 secured the highest CSI score (3.84) followed by NTV7 (3.81).

Satellite station ASTRO ranked third with a CSI score of 3.79.

Public stations TV1 and TV2 secured a lower CSI score at 3.65 and 3.70 respectively.

5.1.2 Free-to-air radio

With the exception of three stations (Radio 5, Hitz FM and My FM) all other stations experienced a decline in CSI score.

Public stations Radio 3 (3.85) and Radio 5 (3.84) secured the highest CSI score.

Radio ERA although being the most popular radio station, secured a lower CSI of 3.77.

5.1 Postal Service – counter service

There is a slight improvement in CSI score for counter services from 3.67 in Wave 5 to 3.71 in Wave 6.

The counter service is rated relatively high with regard to friendly service, facilities, efficiency and appropriate responses.

Two issues that are rated relatively low is the waiting time and providing user-friendly facilities.

The two high priority areas for improvement are; waiting time at the counter and providing more user-friendly facilities for disabled and ordinary customers.

5.2 Courier Study

5.2.1 Courier Service

The international courier companies have higher CSI score (3.93) compared to the domestic courier companies (3.90).

All sectors ranked international courier companies performance better than the domestic courier companies.

Among domestic courier companies, National Express secured higher CSI score (4.05) than Pos Laju (3.80).

The international courier company with highest CSI score is DHL Worldwide (4.05).

5.3 Other Findings

5.3.1 Broadcasting Services

5.3.1.1 Free-to-air television services

The average viewing time per day for television declined from 2.90 hours in Wave 5 to 2.58 hours in Wave 6.

The younger respondents spent more time viewing television compared to the older respondents.

TV3 remains the most popular television station with 67% frequent viewers followed by NTV7 (38%).

The public stations TV1 (10%) and TV2 (16%) attracted a smaller percentage of frequent viewers.

5.3.1.2 Satellite television services

Subscription to ASTRO's services increased to 31% in Wave 6 from 30% in Wave 5.

5.3.1.3 Free-to-air radio services

The average listening time per day for radio declined from 2.37 hours in Wave 5 to 2.18 hours in Wave 6.

Listening time is highest among the young respondents and declined as age increases.

ERA remains as the most popular radio station. 30% of the respondents listened to it frequently.

Radio 3 is the most popular among the public stations. 19% of the respondents listened to it frequently.

5.3.1.4 Influenced by advertisements

67% of the television viewers paid little attention to advertisements.

Majority of the respondents perceived that they were not easily influenced by advertisements in making a decision to purchase.

Majority of the respondents suggested the number of advertisements should be reduced or eliminated completely.

Maximum of 10 minutes per hour is the most acceptable time for advertisement slots both on television and radio channels.

5.3.1.5 Knowledge of regulatory body

Only 37% knew of the existence of MCMC.

19% have heard of the Consumer Forum.

A smaller percentage of about 8% of the respondents have heard of the Content Forum.

5.3.2 Postal Services

5.3.2.1 Post Office Services

Majority of the respondents (52%) used the various post office facilities occasionally. Another 22% used the facilities frequently.

5.3.2.2 Payment of Bills

17% of the respondents used the bill payment facilities frequently while another 44% used it occasionally.

Only 14% of the respondents claimed to know the duration taken by the post offices to settle their bills with the respective agencies.

About half (51%) considered 1-3 days the duration taken by post offices to settle their bills with the respective agencies.

92% have confidence with the bill payment services provided by the post offices.

5.3.2.3 Cash Remittance

Majority (67%) of the respondents had never made cash remittance through the post offices. The other 33% had remitted cash either less frequently, occasionally or frequently.

89% of those who had used the facility indicated that they have confidence in the services provided by the facility.

5.3.2.4 Post Boxes

Among those who used the service, 76% claimed it is more convenient to remit cash through commercial banks.

About 69% of the respondents had the opportunity to use the post boxes either occasionally or frequently.

75% of the respondents who had used the post boxes indicated that they are confident the postman will collect and deliver their letters.

60% of the respondents who had used the post boxes considered it easily accessible.

5.3.2.5 Registered Letters

Only 37% of the respondents had used registered letter service of Pos Malaysia less frequently, occasionally or frequently.

88% of those who had the experience with registered letters found its rates appropriate.

More than 90% were confident the registered letters were delivered safely.

5.3.2.6 The Postman

Only 21% of the respondents knew the postman serving in their residential areas personally.

Based on their perception, 96% of the respondents considered their postman as trustworthy and 77% considered them as friendly.

85% are satisfied with the services of their postman.

5.3.2.7 Complaints about Pos Malaysia Services

Only 9% of the respondents claimed to have encountered problems with post office services.

A small percentage of 29% knew who to contact if they wanted to file a complaint.

25% actually made the complaints and only a small percentage (13%) were satisfied with the promptness in handling of their complaints.

Only 10% were satisfied with how their complaints were resolved.

5.3.3 Courier Services

5.3.3.1 Frequency of using courier services

65% of the respondents used courier services frequently and very frequently.

Majority (62%) of frequent users of the courier service engaged one company and another 30% engaged two companies.

Higher percentage of businesses in the transport and trading sectors, service and banking and finance sectors used two courier companies.

5.3.3.2 Courier companies employed

Among businesses that engaged domestic courier companies, 44% used the service of Pos Laju.

DHL Worldwide is the more prominent international courier company.

5.3.3.3 Confidence and trust

The respondents place higher confidence and trust in international courier companies (56%) compared to the domestic courier companies (44%).

The public sector (75%) showed high confidence and trust in the domestic courier companies.

Other business sectors showed higher confidence and trust in the international courier companies.

5.3.3.4 Courier rates

The rates charged by domestic courier companies (76%) and international courier companies (68%) are considered as appropriate.

A small percentage considered domestic courier companies (14%) and international courier companies (32%) rates as too high.

45% of the respondents are willing to pay more for better service.

Majority (59%) agreed on up to 5% increase, another 26% considered up to 10% increase as appropriate. Only 15% suggested an increase rate of more than 10 %.

5.3.3.5 Satisfaction with billing

About 80% of the respondents are satisfied with the billings of their courier companies.

72% of the frequent customers of domestic courier companies are satisfied with notification of changes in rates and condition of services.

5.3.3.6 Consumer service

Majority claimed that they made contact with courier companies mainly for collection of packages and posting of packages.

90% claimed that it was easy to contact the relevant person within the companies.

More than 80% are satisfied with the prompt response they received from the courier companies.

Majority of the domestic (82%) and international (72%) courier customers are satisfied with how their queries were resolved.

More than 80% are satisfied with the stock of supplies given by the courier companies as well as the response to request for more supplies.

5.3.3.7 Track and trace service

Only a small percentage of the businesses use track and trace service (17% for domestic courier companies and 21% for international courier companies).

96% claimed that the courier companies were able to track and trace their items.

An average of 67% are satisfied with the tracking service.

5.3.3.8 Complaints with services

Less than 5% made frequent complaints about the services of their courier companies.

Those who complained said that the complaints were less than 5% of the overall shipments.

About 40% would prefer to be consulted should the courier companies need to inspect their packages for illegal items.

5.3.3.9 Knowledge of regulatory body

Only 37% knew of the existence of MCMC.

19% have heard of the Consumer Forum.

A smaller percentage of about 8% of the respondents have heard of the Content Forum.

5.4 Areas for improvement

5.4.1 Free-to-air television

Stations	CSI Wave VI	Areas for improvement (Station standard)	Areas for improvement (Industry standard) (CSI score = 3.80)
TV1 (n=233)	3.65	<ul style="list-style-type: none"> ▪ First-run programmes ▪ Advertisement slots ▪ Violence and sex programmes 	<ul style="list-style-type: none"> ▪ Balanced news ▪ Variety of quality programmes ▪ More local programmes ▪ First-run programmes ▪ Advertisement slots ▪ Violence and sex programmes ▪ Promoting Malaysian culture
TV2 (n=360)	3.70	<ul style="list-style-type: none"> ▪ First-run programmes ▪ Advertisement slots ▪ Violence and sex programmes 	<ul style="list-style-type: none"> ▪ Balanced news ▪ Variety of quality programmes ▪ More local programmes ▪ First-run programmes ▪ Advertisement slots ▪ Violence and sex programmes ▪ Promoting Malaysian culture
TV3 (n=1541)	3.84	<ul style="list-style-type: none"> ▪ First-run programmes ▪ Advertisement slots ▪ Violence and sex programmes 	<ul style="list-style-type: none"> ▪ Advertisement slots ▪ Violence and sex programmes
NTV7 (n=872)	3.81	<ul style="list-style-type: none"> ▪ More local programmes ▪ Advertisement slots ▪ Violence and sex programmes 	<ul style="list-style-type: none"> ▪ More local programmes ▪ Advertisement slots ▪ Violence and sex programmes

5.4.2 Satellite television-Astro

Station	CSI Wave VI	Areas for improvement (station standard)	Areas for improvement (industry standard) CSI score = 3.80
ASTRO (n=711)	3.79	<ul style="list-style-type: none"> ▪ More local programmes ▪ First-run programmes ▪ Advertisement slots ▪ Violence and sex programmes ▪ Promoting Malaysian culture 	<ul style="list-style-type: none"> ▪ More local programmes ▪ First-run programmes ▪ Advertisement slots ▪ Violence and sex programmes ▪ Promoting Malaysian culture

5.4.3 Free-to-air radio

Stations	CSI score	Areas for improvement (Station standard)	Areas for improvement (Industry standard) CSI score = 3.81
Radio 3 (n=418)	3.85	<ul style="list-style-type: none"> ▪ Balance programmes ▪ Promoting local music ▪ Advertisements slot 	<ul style="list-style-type: none"> ▪ Promoting local music ▪ Advertisements slot
Radio 5 (n=286)	3.84	<ul style="list-style-type: none"> ▪ Balance programmes ▪ Promoting local music ▪ Advertisements slot 	<ul style="list-style-type: none"> ▪ Advertisements slot
Hitz FM (n=291)	3.83	<ul style="list-style-type: none"> ▪ Promoting Malaysian culture ▪ Balance programmes ▪ Promoting local music ▪ Advertisements slot 	<ul style="list-style-type: none"> ▪ Promoting Malaysian culture ▪ Balance programmes ▪ Promoting local music ▪ Advertisements slot
My FM (n=386)	3.83	<ul style="list-style-type: none"> ▪ Promoting Malaysian culture ▪ Balance programmes ▪ Promoting local music ▪ Advertisements slot 	<ul style="list-style-type: none"> ▪ Promoting Malaysian culture ▪ Promoting local music ▪ Advertisements slot
Radio 6 (n=346)	3.82	<ul style="list-style-type: none"> ▪ Balance programmes ▪ Promoting local music ▪ Advertisements slot 	<ul style="list-style-type: none"> ▪ Balance programmes ▪ Promoting local music ▪ Advertisements slot
Radio Muzik (n=297)	3.82	<ul style="list-style-type: none"> ▪ Promoting Malaysian culture ▪ Balance programmes ▪ Advertisements slot 	<ul style="list-style-type: none"> ▪ Balance programmes ▪ Advertisements slot
Time Highway Radio (n=376)	3.81	<ul style="list-style-type: none"> ▪ Promoting Malaysian culture ▪ Balance programmes ▪ Accurate news ▪ Advertisements slot 	<ul style="list-style-type: none"> ▪ Promoting Malaysian culture ▪ Balance programmes ▪ Accurate news ▪ Advertisements slot
ERA (n=666)	3.77	<ul style="list-style-type: none"> ▪ Promoting Malaysian culture ▪ Balance programmes ▪ Advertisements slot 	<ul style="list-style-type: none"> ▪ Promoting Malaysian culture ▪ Public interest discussion ▪ Balance programmes ▪ Advertisements slot
Radio 1 (n=160)	3.72	<ul style="list-style-type: none"> ▪ Balance programmes ▪ Advertisements slot 	<ul style="list-style-type: none"> ▪ Promoting Malaysian culture ▪ Public interest discussion ▪ Balance programmes ▪ Advertisements slot

Mix FM (n=120)	3.69	<ul style="list-style-type: none"> ▪ Promoting Malaysian culture ▪ Public interest discussion ▪ Balance programmes ▪ Promoting local music ▪ Advertisements slot 	<ul style="list-style-type: none"> ▪ Promoting Malaysian culture ▪ Public interest discussion ▪ Balance programmes ▪ Promoting local music ▪ Advertisements slot
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5.4.4 Courier Services

	CSI	Areas for improvement
Domestic courier companies. (n=472)	3.90	Inform customers of non-service coverage area Efficient collection Ensure delivery Responds to complaints Services as advertised
International courier companies. (n=67)	3.93	Inform customers of non-service coverage area Responds to complaints Services as advertised

Appendix I - Television and Radio Broadcasting Focus Group Study

Profile of informants

A total of 60 male and female adolescents of various ethnic groups and socio-economic backgrounds between the ages of 13 to 17 were selected randomly from the survey sampled areas as informants. For this study there was a total of twelve groups of informants from the six designated zones that is, central: Shah Alam and Kuala Lumpur; eastern: Kuantan, northern: Ipoh, southern: Malacca; Sabah and Sarawak.

The informants were interviewed in groups of five. Each focus group session lasted about 45 minutes. The discussions were guided by several thematic questions and the analysis is organized according to those themes.

Viewing and listening patterns

Television

Television viewing is a “must” activity that has become part and parcel of the everyday lives of these adolescents. They seemed to have grown up with this much taken for granted activity. Most mentioned that a day without television would be an odd day. On the several occasions when their television sets had broken down or there was a problem with the electric power supply the absence of the television being switched on was much felt.

Most informants began their viewing session after school as early as 2pm and watched as late as the last “interesting” programme whatever that may be. Weekend viewing for those who were not in the examination year began as early as 9am and as late as 2am.

- *“so use to tv being on everyday since I was very small”*
- *“when my tv broke down it was so boring nothing to do”*
- *“can’t imagine what it would be like without it in my house”*
- *“its important to watch tv, you get information”*
- *“my mother lets me watch so that I don’t go out”*
- *“I watched right after school except when I have Math tuition”*
- *“from 8 pm to 11 pm”*
- *“9 to 1 am most days”*
- *“...benci sungguh iklan!”*
- *“the new ones interesting the repeated ones are boring”*
- *“Near Merdeka I like especially the ads”*
- *“...ada meaning and story not like some nonsense”*
- *“switch channel when ad in on”*
- *“some are good tell us about new products”*
- *“I don’t follow them I buy what I like”*
- *“I have tried before like shampoo and its not true”*
- *“the ones in magazines are better guides...”*

Radio

Duration

Listening to the radio is a favourite past time for these young informants. They seemed to listen to the radio throughout the day. Although upon further probing it was revealed that the majority tuned in with considerable attention to the radio early in the morning, late in the evenings and into the wee hours of the morning.

They enjoyed the music, informative news break, music dedication programmes, talk shows and the chattiness of the deejays. On an average the informants listened between 4 to 6 hours a day throughout the week.

- *“early in the morning switch it on when I get up”*
- *“4 hours ...”*
- *“...at night for 3 hours when I start to study”*
- *“...after dinner around 8 or 9 till I fall asleep so 4 hours”*
- *“maybe 2 hours in the afternoon and maybe ...if my mother doesn’t check 2 hours at night”*
- *“all times when I am not watching tv”*
- *“a lot of hours...could be 6”*
- *“I think 12 hours from 6 to midnight”*

Time

Since radio listening becomes a backdrop to their everyday activities such as studying, doing homework, cleaning their parents’ car (or cars), chatting with friends, surfing the Net, etc. there is no particular time as to when the radio was actually on. For most informants, the radio was on when they were “on” – meaning when they are awake although one or two did admit to leaving the radio on even while they were sleeping.

Hence, when asked for the exact time of day for radio listening the majority of informants were vague about it. There were however, particular programmes such as the Carta ERA that they would not miss and would remember to tune in at the right time.

- *“...bila-bila dan dimana-mana saja I dengar radio...”*
- *“...walk into room and my finger puts it on...”*
- *“...mostly late at night...”*
- *“...when I do my studying, homework or just lying around...”*
- *“...not tv its radio...”*
- *“...can’t say but a lot of my day because of the music”*

Location

These informants listened to their radios and walkman mostly in their rooms or in the car. All informants interviewed either have their own radio or shared one with another sibling.

- *“...in my bedroom so I get privacy when I sing along”*
- *“...in the room since my mothers complains of the noise.”*
- *“...in the car but its my father’s choice of station”*
- *“...room..”*
- *“...we have one good set in the living room and I only use that when I am alone at home. Mostly in my room...”*

Viewing and listening preferences

Television

Genre and themes

Again with this group of informants the popular genre remained similar as with the previous groups in the Wave 5 study. Documentaries, reality programmes, cartoons, sitcoms, music shows, action-packed and sci-fic dramas were high on their list of favourite genres. Sports too, remained another favourite among the male informants. Documentaries and reality programmes were popular among both male and female informants.

These programmes provided them not only with good visual images but were filled with new information. “Survivor” for instance made them feel that they too wanted to do similar acts. The dramas whether romantic, investigative or sci-fic were always action-oriented with themes that appeal to the young such as love relationship, issues with parents or about adjusting to new changes. Chinese, Japanese, Korean and Hindi movies and dramas captivated them with handsome and beautiful actors, good realistic plots, good music, attires and good cinematographic scenes.

Most informants agreed that since most of their parents would often sit in together to share the viewing therefore documentaries and reality shows made family viewing time a pleasant one since they contained hardly any scene that would make them uncomfortable. Although dramas and movies tended to be a family favourite this genre had at times made them uneasy since the plot unravelled certain scenes or storyline that was of a sexual nature. These discomforts were faced only when they were in the company of parents or siblings of different gender.

- *“cartoons and comedy with me...”*
- *“My love heartbeat, Korean and music shows...”*
- *“...Slam Dunk, DragonBall and Senario...”*
- *“Smallville, Gerak Khas and Hindi movies because of the handsome actors...”*
- *“adventure type films, police story, suspend like Roswell and X-Files”*
- *“Love story especially Hindu about the Doctors in the hospital in the afternoons...and all music variety show...”*
- *“serials and sports...”*
- *“Smallville, National Geographic, Majallah 3 all give new information...”*
- *“...sci-fic and movies especially the one around 6pm on ASTRO...”*
- *“...Melodi, Arching Hero, Titian Harapan..”*
- *“...Discovery, Sports and Animal Planet...”*
- *“me too with my father”*
- *“survivor, Joe Millionaire, Wah Lai Toi...”*
- *“Inspirasi, dramas only at times awkward because of the kissing...”*
- *“Kisah Benar, 999, Gerak Khas...”*

The favourite programmes as recalled by these informants were similar in theme if not identical in name to the ones mentioned by the informants in the previous study (Wave 5). Action-packed investigative, science-fiction, thrillers with high suspense level and love plots interwoven in between the gun shootings, explosions, car chases, dare devil stunts, special effects were high on their list.

These programmes although containing scenes of violence and sexuality have relatively well-developed scripts that made them popular to young people everywhere. These programmes were aired on weekdays and most of their parents would view them together with their children. Although the informants especially the young women expressed their uneasiness with the degree of sexually suggestive scenes in these programmes they would either “keep quiet or stare blankly till its over” while in the company of their fathers or brothers. At times, either one of their parents would switch to another channel and returned to it after a few minutes.

Sitcoms were another popular genre and the shows cited included “That 70’s Show”, “Drew Carey Show”, “2 Guys and a Girl”, and “Malcolm in the Middle”. Imported dramas from Korea, Japan and the Hindi movies continued to captivate these young audiences with their love themes, songs and dances, good costumes and good-looking actors.

- *“...Korean Drama is the best...”*
- *“Drew Carey show is so alive...he’s fat but he’s the star..”*
- *“Charm because all the witches are beautiful girls ...”*
- *“super powers are exciting like Mutant X, Angel”*
- *“X-Files....”*

The range in the list of programmes cited by these informants revealed that what appealed to them in those programmes were the plots that dealt with crimes, superpowers, romance and suspense whether extraterrestrial, ghostly, devilish or human wickedness that were explored through fast moving, action-packed, high tech special effects with good looking actors and actresses.

The sitcoms contained humour that made them laugh at common human behaviour and a lifestyle for young people that seemed relax and successful. The documentaries and reality shows were informative with good narrations and visuals. Discussions revealed that these adolescents preferred these programmes to most local productions that they complained were “too slow, and unreal”.

Language

Since most of the favourite programmes cited were in the English language except for Korean, Japanese, Hindi and Chinese movies and dramas it would be fair to assume that although these informants’ command of the language was weak they were able to follow and enjoyed the programmes. According to them the subtitles did help but more so the well-laid out plots and visuals that seemed to present the story to them rather easily.

The Korean, Japanese, Hindi and Chinese dramas and movies were favourites due to the plots, themes, visuals, good acting by good looking characters. Again here, although at times the subtitles were inadequate informants admitted that they did rely on them to follow the storyline.

- "...the language is not important but the story is..."
- "like Hindi movies so good to watch I don't want it to end..."
- "I agree and so are the Korean shows..."

Presentation formats: favourite stations

TV3 is the number one television station with NTV7 coming in a close second. In fact many of the informants were divided between the two stations and many preferred to rank them both as their "no:1" choice. However, when asked to list out the criteria for their selection TV3 came out the winner.

Informants preferred TV3 since it aired the latest shows and seemed to "keep their word about no cancellations...". In addition, many pointed out that TV3 had the most beautiful, or good looking and vibrant line up of personalities to deliver their programmes. NTV7 was commended for "great outdoor shoots" especially with the news. As for ASTRO, the popular channels were MTV, VHS, Star World, Discovery, Hallmark, Disney Channels, the Movie Channels and the Wah Lai Toi.

- "...TV3 is the best with all the best show always all there..."
- "everyday they plan good shows for everybody..."
- "semua pengacara cantik, segar dan tak boring..."
- "never cancel shows..."
- "sometimes I am bored with the ads..."
- "NTV7 is just as good..."
- "...prefer ASTRO channels because I get the music all the time"
- "ASTRO is good not much ads like TV3 or NTV7"
- "TV3 is my choice but I wish they have less ads except for good ones"

Although TV3 was noted for quality and current programmes the informants were unhappy with the frequent airing of ads during their favourite programmes. One informant remarked that in his observation the more popular a programme is the more ads there seemed to be. The ardent viewers of ASTRO's packages were relatively complacent as to the ads and promos that were aired.

Radio

Genre

All of the informants who were ardent music lovers and radio listeners to the various stations asked for "more music please". That is what radio is to them. It is a source of music and information about the songs, the artistes, and the lyrics. For those who could afford to buy CDs and cassettes the radio was their only source for entertainment.

The news, traffic breaks, jingles and talk shows were of less importance to them when tuning to the radio. Quizzes and various contests that related to music were given particular attention. The rest were background and should there be too long a gap before "good music" was on again, then most informants would either put their CDs and cassettes on or switch it off.

- "...I put on the radio just for the music..."
- "the songs must be right so I get my mood for studying..."
- "too much talk and news etc I just play my CDs..."
- "...when the news is on I change the station..."

- *"..Traffic breaks are unimportant. I can't drive"*
- *"contest about songs and singers give good prizes.."*
- *"...hard to follow the news can't understand what they say..."*
- *"call in to guess songs are good fun and win some money or tickets"*
- *"music to study...relaxing..."*
- *"can't afford new CDs so I listen to them on my radio..."*
- *"...don't really pay attention to ads or news its just there..."*

Presentation formats: favourite stations

Several stations received mentioned by the informants. Among them were ERA, Hitz FM, Mix FM, Light and Easy, and IKIM. ERA was again singled out as being progressive with current songs, deejays that have latest information on the music scene and with a versatility that made them a companion to their audience.

- *"of course its ERA best..."*
- *"ERA ..."*
- *"...ERA then Hits FM..."*
- *"IKIM and ERA..."*
- *"Mix FM, ERA and ...that's it lah..."*
- *"ERA's dj makes us feel good and close to us..."*
- *"...agree...mesra and funny"*
- *"No not rude biasalah tu cakap like that ..."*
- *"...ads are okay better than on tv"*
- *"the ads have funny voices and make me laugh I think they are okay on ERA"*

Socialising patterns and media usage: peers, parents, siblings, others

Television

Similar to the informants in Wave V, these informants also watched television with their family that included their parents, siblings, grand parents and even maids. The extended family situation was prevalent among the adolescents from the small towns. Programmes were selected by the adults who could be either of the parents, grandparents but at times the younger siblings got their way.

Hence, since most parents watched TV3 therefore TV3 became their channels well. Often, they disclosed that they would watched a programme not out of choice but because it was already on and there was nothing else to do other than study. This happened a lot with news and local programmes.

- *"no choice so I just sit and watched"*
- *"...sometimes we decide together but its no problem since we like the same show"*
- *"my younger sister will cry if we change her show..."*
- *"...mostly my mother..."*
- *"..my father and older brother..."*

Radio

The selection of radio programmes was entirely theirs since most informants had their own radio sets. They were also heavy users of music CDs and cassettes.

- *"...its just to listen to music..."*
- *"...my selection"*
- *"just on it in the room..."*

Cultural consequences: Norms and values

Television

It was evident from the discussions that "free time" meant "tv time" for these young informants. Only one informant had music lessons while all others attended various tuition and co-curricular activities. An informant remarked that "watching tv is cheaper than going to the movies". They would still watch the latest box office hit at the cinema but this was not a weekly affair.

The programmes frequently watched by these informants included the various documentaries, sitcoms, cartoons, reality shows, sports, news, dramas and movies. Religious talk shows and motivational talks were also mentioned by the Malay informants. Generally, informants noted that the content of their favourite genres were both entertaining and informative especially the documentaries, reality and news programmes. Most informants watched the news not by choice but due to their parents. Channel selection in most homes especially in the evening was determined by parents.

Although, these informants pointed out that most dramas and sitcoms contained sexually related subjects or words and violent acts, they did not object to such contents. On the contrary they felt that all of these were part of real life and they should be aware of them. And if not for their parents or siblings of opposite sex present they would not even be affected by such materials. A few felt that those programmes were already "cut by those in charge so it should okay for them but not for kids...". It was obvious that these adolescents between 13 to 17 regarded themselves as a separate group that was mature compared to those in the primary school.

It is worth noting that the numerous ads aired over the various channels were tremendously unpopular and irritating to these young people. They hardly found them entertaining or persuasive with the exception of a few notable ads around festive seasons. Instead, fashion sense, talking style and attitudes towards people and life in general were picked up from the various programmes. Most informants admitted to following the everyday fashion wear, make up and hairstyles of various stars and tv personalities. "...why not they are the stars on tv all over the world and they are popular..." remarked a young female informant when asked to comment on her dress sense that resembled a cross between Britney Spears and Pink.

Popular tv programmes were also attributed as the source of better understanding of relationships and other cultures. They mentioned that they learned about animals and other cultures faster through the television than through readings. For one thing not much reading materials on such subjects were readily available in most of their homes. And many informants admitted that they did not read beyond their textbooks on the world opened up to them. It was almost as if once the television was switched on the world opened up to them.

As with the previous study, these informants also felt that the imported programmes from various countries in the east and west in the form of dramas, sitcoms, reality and documentaries did not disseminate negative values. They felt that there is commonness in the values although the ways of doing things, living and aspirations were different. Values such as respect, loyalty, sincerity, honesty, hardworking, lovingness and caring, responsibility and helping others could be found in both western and eastern programmes. Sexual values as expressed in acts of intimacy were regarded as offensive to religious beliefs but were seen by them as normal part of life. Several male informants admitted that they had watched more offensive materials either on uncensored movies on CDs and on the Internet.

Radio

The radio was not seen as a purveyor of cultural values positive or negative. The radio was seen as a good source of music. Television was instead viewed as the “teacher” through the good visuals, colour and creative attention grabbing formats. Although some of the lyrics contained offensive and suggestive ideas many informants mentioned that it was the good music that held their attention. The sexuality of songs only became obvious when they watched the music videos on the television.

Desired needs and expectations of media services

Television

Similar to the findings in Wave 5, these informants felt that there were limited programmes that truly catered to their age group. Most programmes were meant for adult viewers or children. All informants agreed that there should be more programmes for young people on the various channels. Unless, one subscribed to ASTRO then the number of documentary programmes were again limited.

Many informants would like to view more dramas and sitcoms that involved adolescent issues, science oriented programmes, cartoons, music variety and sports among youth. Informants further requested for more motivational type programmes that could guide and inspire them to achieve a better quality of life. They would also want to see more programmes that show “Malaysia Cemerlang” for such programmes could make them more patriotic and have pride in their fellow Malaysians. Such programmes should also get international audiences.

Radio

Generally, informants were happy with their favourite stations and the type of music played throughout the day. Since there are more radio stations than there are television stations the competition is high. Thus, informants felt that they have a choice in their listening preference. Most informants had listed at least two stations as their favourite. Radio to them should be all music and less talk which one informant remarked as “...membebel saja...”

Summary

Admittedly, the findings revealed that these adolescents spent a total of about 5 hours per day throughout the week on television programmes and an unlisted number of hours listening to the radio either as background or attentively. They can

be classified as heavy media users. Favourite genres included the documentaries and reality shows, action packed dramas, foreign mini-series, sitcoms, musical variety shows and cartoons. Documentaries of places, animals and foreign cultures were both informative and entertaining.

These documentaries provided them with information in a quick, creative and easy manner. Reality shows of various types showed them that real people could live up to the various challenges and that life could be challenging yet fun and rewarding. These reality shows have inspired many of them. A favourite theme among these informants was love stories about young couples and hence, the foreign dramas and movies appealed to these informants (both males and females).

It was not surprising that action packed, investigative, thriller and suspense dramas with plots on young characters remained popular. Programmes such as Charmed, Roswell, Dark Angel, Buffy the Vampire Slayer, Angel, etc. were on their list of favourites. Such dramas fed their imagination with the possibilities of futuristic life whether here on Earth or another Galaxy (as with Star Trek), the product of scientific experiments (as with Dark Angel and Mutant X), or super beings (Smallville, Charmed, etc). Such creative programmes challenge their minds while entertaining them.

Compared to locally produced dramas, their foreign counterparts were of much higher quality both in content and production. Sitcoms and cartoons were the genres that allowed them to laugh and be at ease. Although the same cartoons were watched even by 3 year olds they never made them feel childish or silly. Cartoons they said were meant for all age groups.

From this study, it was found that male informants paid considerable attention to the sports programmes. The female informants spent more hours viewing social dramas and Hindi movies than the males. They were also more likely to emulate the fashion sense and conversational style of their favourite television personalities.

In line with the findings of Wave 5 for the radio, these informants appeared to have similar listening patterns that is, the radio is a background low involvement media activity. The radio is a constant supplier of good music of various types. Informants tuned to the radio for music above anything else.

In short, it can be concluded the findings of Wave 5 and Wave 6 revealed similar patterns, tendencies and preferences of radio and television usage among informants between 13 to 17 years of age.

Appendix II: Postal Focus Group Study

Profile of informants

The informants were men and women of various ethnic groups and socio-economic backgrounds. They were between the ages of 18 to 55 and were selected randomly from the survey sampled areas. Twelve groups from the six designated zones that is, central: Shah Alam and Kuala Lumpur; southern: Malacca, northern: Ipoh; eastern: Kuantan; Sabah and Sarawak. The informants were interviewed in groups of five. A total of 60 people participated in the discussions.

The discussions were guided by several thematic questions and the analysis is organized according to those themes.

Image of Pos Malaysia

Informants were asked to recall the first symbol (either word, expression or action) that came into their mind when they think of Pos Malaysia. The various symbols either in form or descriptive words included ;

- *“Pay bills”*
- *“Setem dan surat”*
- *“Long queues*
- *“Sama juga .. line panjang”*
- *“Sibuk dan susah parking, setem, bill dan lesen..”*
- *“Kaunter kurang kena plan timing betul-betul..”*
- *“Sesak, sibuk dan setem, bill”*
- *“Banyak orang dan macam-macam orang tua ada.. muda ada”*
- *“Lambat tunggu .. biasa dia orang slow .. “*
- *“Surat lambat..”*

These descriptors that included both the form such as stamps, bills, licences, etc and the transaction process such as the long queues, lack of counters, busy, packed, many types of people, long wait was the immediate recall symbols provided by informants when they think of Pos Malaysia.

Logo

As to the current logo of Pos Malaysia, there was a mix response as to whether to retain or change the logo. Although several informants suggested a brighter colour and a few could not recollect the symbols in the logo, the current logo was regarded as established and the issue with Pos Malaysia was not related to the logo but rather to the services provided.

However, informants in the various zones interviewed also felt that it was timely to change the logo from the “bird” to something more “IT” related. It was also mentioned that a change in logo could bring about new attitude towards work and services. In addition, Pos Malaysia as an organisation has changed its structure and so, a change in colours and logo would reflect the change in the structure.

- *“okay...tiada masalah”*
- *“logo dia tepat melambangkan tugas Pos”*

- *“...mungkin color patut lebih terang... kuning...”*
- *“cari logo lebih IT...”*
- *“macam Polis ada tukar warna uniform, logo juga dan baiki perkhidmatan”*
- *“cuba gambarkan imej korporat yang baru dan bezakan dari yang bawah government dulu...”*
- *“...kekalkan...problem dengan slow dia bukan logo...”*
- *“...tukar logo buat apa lagi susah kita cari...tukar style kerja saja”*
- *“bukan logo...uniform mesti ada smart sikit”*
- *“...bukan tukar logo...baiki servis...”*
- *“buat apa tukar logo bagi perkhidmatan cemerlang cukup”*

Counter services

Counter personnel

Informants who frequently visited their neighbourhood post offices commented that their local counter personnel were friendly and helpful. A few mentioned that these personnel were their neighbours and friends. However, the counter personnel in the bigger or busier post offices were regarded as “too busy to attend to people...” since they had to conduct various tasks for each customer at their counters.

Inasmuch as informants were sympathetic to the routine and multiple tasks of each counter clerk and the lack of opportunity for change in designated job or promotion, they felt that their attitudes must be more positive and customer oriented. After all, even the customers had job issues of their own and some were without a job!

Many informants felt that perhaps the counter clerks did not feel important nor do they understand their huge responsibility in maintaining a good image of their organisation. Eye contact was again noted as lacking and very necessary in handling customers at the counter. An informant mentioned that the “mata mesti senyum tak perlu bercakap pun” would help to make their long wait a little bearable especially during peak times of the month.

- *“...ada beza di bandar dan pekan kecil...”*
- *“...orang kita juga...kita dah tahu pe'il dia..”*
- *“...to say sombong I'm not sure but maybe cant be bothered with us...”*
- *“...macam terpaksa buat kerja aje...”*
- *“...pakai uniform...”*
- *“... Kita penat dia pun penat...faham saja asalkan cepat buat kerja”*
- *“...penat kira setem berapa...”*
- *“...beri layanan ikut mood dia...”*
- *“...kalau tanya dia dah habis pada hal benda tu baru keluar. Itu satu servis yang lembap”*
- *“...nada suara dia macam marah atau kasar saja...”*
- *“...jenis-jenis yang tua yang dah nak pencen..”*
- *“...yang muda tak nampak sangat, oklah...”*
- *“they don't like to answer questions...”*
- *“...I agree only want to process and sometimes give fed up look when I ask questions....about rates or delivery time...”*
- *“...maybe because they want to be fast or they don't know the answer...I also not sure...”*
- *“patut pakai uniform...”*
- *“agreed gives better appearance smart look...”*

- *“...counters small ...”*
- *“...I use the small post office and people are all friendly and sometimes they even tell me at pasar malam ada surat daftar for me ...macam kawan tapi memang dia orang sibuk dan boleh marah bila ada orang yang macam tak tahu apa nak buat...”*
- *“ kadang saya tak salah mereka kaunter sikit, kerja banyak dan orang ramai, semua nak buat semua nak cepat..”*
- *“...have more counters why so few? People don't like to wait...”*

Informants agreed that although they understood the workload and the routine nature of work as a postal counter clerk, they felt that their needs must be served first since they are the customers. “We bring them the money so they must give good service...no excuse”. It was not so much in the rudeness although they had been reports of such acts, it was more the “dry and blank attitude given”. Counter clerks should have an opening line such as ,” Can I assist you?” instead of the customer having to begin. “Patut ada pembuka kata. Bukan kita buka mulut dia pula... PR kurang”

Although informants were reminded not to compare with the banks many still did that out of necessity to show the difference. The numbering system has helped to organise the queues although counter clerks tended to stop work immediately regardless of customers already with numbers for that particular day. It would be advantageous to both if they continued past their work time and completed the transaction for the day. Perhaps, they could close the doors at certain time but attend to all that had already queued or taken numbers for that day.

Suggestions for counter service

The informants were asked to suggest ways of improving the counter services and the list includes;

- a) Counters must be opened on time as stated in their notice of service times. Customers should not have to wait for personnel to walk in or prepare themselves while customers have already queued or taken the numbers for the morning.
- b) All post offices must use the number system according to types of services.
- c) There must be specific counters to attend to particular tasks. For instance do not mix letters and stamps with bill payments, licence renewal and pension funds.
- d) More counters especially during peak hours of the day and peak period of the month and year.
- e) Open counters on Sundays and public holidays to accommodate for the private sector that cannot leave their work easily.
- f) Clerks must operate and attend to customers according to the numbers given in the day or according to the queue at a designated time of the day. For instance, people must not be allowed to queue after 4.15 pm and a signage could be posted to indicate the last person to be attended on that day.

- g) Do not terminate service when the person has already queued up. This attitude is not customer friendly.
- h) Attend to customers and not to personal calls and chat while manning counters.
- i) Counters should be clean and without personal items such as photos, floral arrangement, etc.
- j) Counter clerks should wear uniforms or jackets that reflect the corporate image.
- k) Customers are people and the post offices must adopt a customer oriented attitude: friendly service with eye contact and positive tone of voice.
- l) There should be made available for customers the various forms, pens, glue and table for writing.
- m) The waiting area should be clean, lighted and air-conditioned.

Post Boxes

As to the red coloured either rounded pillar or rectangle shaped boxes, informants agreed that the problem with those boxes is a lack of security. They were hesitant to drop important mail in them for there was no real assurance of security. In addition, they were also not confident that there was regular pick-up of mail from those boxes especially boxes that appeared old, unused and weather-beaten.

Nevertheless, they agreed that the boxes do have their function and purpose in the community but there must be efforts on the part of Pos Malaysia to upgrade the maintenance of the boxes and to assure the general public of the security and timely pick-up of all mail deposited in those boxes. Several informants also pointed out that some of these boxes were not placed strategically. Either they were out of the way or along a busy street that made parking and dropping of mail impossible. Many used the boxes that were located by the post offices themselves or at various malls.

- *“dia letak dekat jalan tu, memang busy, kita tak boleh park saja...”*
- *“Tapi kita tak tahu berapa lama dia orang collect benda tu?”*
- *“...sebab kita dah tau pejabat pos punya peti surat memang cantik, I pun suka tapi safety dia tak ada...kalau orang letak minyak gas dalam tu...”*
- *“...safety wise I’m not sure...”*
- *“ don’t use it because the box is near the bus stop, its old and I’m afraid people may tamper with it or maybe even the postman may by-pass...”*

Postman

Generally most informants were oblivious of their postman. All they seemed to care for was that their mail was delivered on schedule and untampered. The majority did not know as to the routes nor the delivery schedule of their postman. However, they did noticed when their letters were not delivered as expected. With the exception of those who resided in the small towns and neighbourhoods, the local postman were most often ignored or missed by these informants.

- *“kita tak bermasalah dengan posman Cuma pos ofis...”*
- *“dia tak ada masa nak get personal...”*
- *“zaman dulu ya dia naik basikal boleh sembang sekarang naik motor...”*

- *“Posman dekat area saya punya tempat tu boleh beli setem lagi*
- *boleh minta tolong pos surat lagi..”*
- *“do we have enough postmen? Maybe that’s the reason why letters are late?..”*

Rates and delivery

As in the previous Wave 5, informants especially those from Sabah and Sarawak requested a re-assessment between the quality of service and rates charged for those in most small and remote towns since the residents depended heavily on the local post office to cater to their multiple needs. Even the rates between the ordinary mail, and pos ekspres were questioned. Informants cited numerous times when they felt cheated by the rates and the late delivery. These informants have had to resort to the courier services that are more expensive as they did not have confidence in Pos Malaysia, be it Pos Laju, Ekspres or regular.

- *“kita bukan berwang bayar tinggi servis rendah”*
- *“I had to pay for insufficient postage by my client. Actually why didn’t the post office weigh properly!...”*
- *“Sarawak ...we need good postal service because we have rural areas that are difficult to reach and courier also don’t get there. We need Pos Malaysia to be good and reasonable rates with proper time of delivery. Now its irregular and when I ask they said its KL problem...”*
- *“ its okay in KK but sometimes late and don’t receive pun ada in outside KK areas...I am from Tuaran”*
- *“...I don’t use POS LAJU eventhough its different because its still POS MALAYSIA to me”*

Waiting time

Similar to the previous study Wave 5, it was again mentioned by the informants that they did expect “waiting time” for any service but the issue was with “how long a wait and whether this is the general pattern of service?” and “how is the waiting? Comfortable or not ?” To most informants during peak times such as the end of the month, festive seasons, student application periods and at lunch time half an hour was acceptable but not when they had to queue standing up.

Although many post offices have now installed the number system that received praise from all, this could be improved with more seats made available. A consistent complaint by informants throughout the research zones was the frequent closing of counters during peak hours, lack of sufficient counters and the late commencement of counter service that was not according to the posted notice of opening hours.

- *“...di restoran pun kita tunggu tapi cepat...”*
- *“kita kerja dan tak boleh keluar lama jadi kalau tunggu lama sangat*
- *kena patah balik...*
- *“ waktu tengah hari ramai ke pejabat Pos, buka banyak sikit lah...”*
- *“ I hate waiting ,tired...”*
- *“they must aim to serve customers within 15 minutes would be good..*
- *“I can accept 30 mins but seating”*
- *“ 30 mins during luch time is okay but not afternoon or late*
- *morning...”*
- *“..they must work faster and have more counters open...”*
- *“...tak faham saya tak cukup pekerja ke...kenapa kaunter tutup”*

- *“ they must study flow of customer traffic...”*
- *“ waktu kaunter di buka tak sama...ada on time ada lewat sikit*
- *macam mana”*

Physical layout of post offices

Again as with Wave 5, these informants agreed that although many post offices in the bigger towns had modern facilities there were as many post offices in the smaller towns and rural areas that lacked the standards expected of today's post office. It was not just the post offices in Sabah and Sarawak that were still behind the desired expectations of customers but also many throughout Peninsula Malaysia.

Dissatisfaction was not focused so much on the location and structure of building but more on the amenities such as fans or air-conditioning, ample seats and space for queues, place to write and all forms and other necessities provided including trash bins. It was also noted that there was a general lack of cleanliness in many post offices. When compared to banks post offices did not have a “clean and business like feeling”.

- *“...like they never sweep the floors and forget about polishing lah...”*
- *“..I like the one in Ampang...”*
- *“ no bakul sampah so people throw their mistakes on the table and on the floor...very bad”*
- *“only one fan and its crowded imagine I...”*
- *“ with the seats it is good and aircon...”*
- *“yang saya pergi kecil saja tapi okay lah...tak berapa sangat”*
- *“...bandar kecil semua orang pakai pejabat pos disitulah kena baiki dulu...”*
- *“ kena jaga kebersihan, kaunter okay tempat orang ramai ...”*

If the first need of customers was the availability of seats, then the second need was for air conditioning. Informants expressed that in a small crowded space in a climate like ours and when they are in their office attire, air conditioning is so necessary. The post office should provide a comfortable environment for them to do their errands.

Desired needs and expectations of postal services

Similar to the findings in Wave 5, informants wondered if at all the counter service personnel had undergone any customer service courses and workshops. There is a need to upgrade their quality of service to customers in line with other customer oriented institutions. Many also felt that uniforms instead of the variety of office wear ranging from “kebaya, baju Kedah to blouse and long skirts” would bring about a corporate identity and with a more positive and efficient attitude toward work.

Thus, on-going training in the form of workshops and retreats for all counter personnel is highly recommended by all informants. It is one thing to have to do business in a less conducive environment and that situation is made worse by counter personnel that appeared bored, uninterested and gave little or no attention to the importance of their customers. Informants also noted that not all counter clerks are of this disposition but there were enough numbers of such clerks that warrant a call for priority to be given to training or a change in personnel at the counters.

Similar to Wave 5, these informants affirmed that what is needed in a public oriented organisation are more friendly and welcoming counter clerks that show enthusiasm in their work. Counter work must involve punctuality, rotation of clerks so that counters

are never closed longer than five minutes, and all personnel must organised their work prior to opening time. When its opening time, it is liken to “showtime” and peak performance must be the objective. The post offices in general have room for improvement in this area with their everyday public.

Informants are aware of the high cost of upgrading the old post offices or even relocating them. Rental of premises especially in strategic locations are expensive but with the large profit that they think Pos Malaysia makes annually, upgrading the physical layout of the post offices should be given due attention. To them, if the local banks can provide quality venues that cater to the comfort of their customers then Pos Malaysia can do the same. Basic amenities must be provided so as to maintain a particular standard. It is not just the counters in post offices that should be well-maintained but the space for the public and also the post boxes.