
Final Report on Customer Satisfaction Survey for the Communications Commission of Kenya (CCK)



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Executive Summary

The Communications Commission of Kenya's Service Charter sets out specific service standards that customers should expect to be met by the Commission and which therefore acts as a public expression of commitment to stakeholders. Of importance is that the Commission remains highly relevant and adaptive in the rapidly changing national and global environment which therefore calls for obtaining accurate understanding of the opinions and requirements of the Commission's customers.

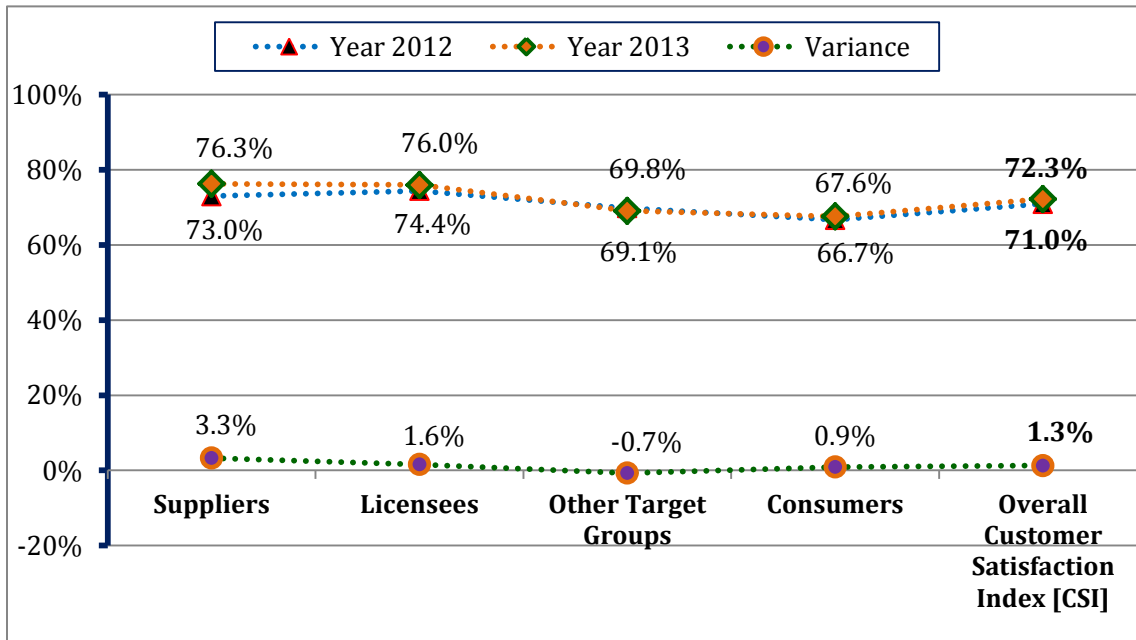
Conducting a Customer Satisfaction Survey is therefore crucial in identifying the key drivers of the actionable results to frontline operations together with other vital aspects of customer loyalty. Consequently, the Commission commissioned Infotrak Research and Consulting to carry out a customer satisfaction survey among its various categories of customers that includes licensees, supplier, consumers of ICT products and services and partner institutions.

The overall objective of the Customer Satisfaction Survey was to determine the Commission's *level of responsiveness, helpfulness, effectiveness and timeliness* to its customers and further measure the impact of the implementation of recommendations from previous surveys. The specific objectives of the Customer Satisfaction Survey included: *to determine the level of satisfaction of the various customers of the Commission with regard to services they seek to obtain from the commission; to identify the factors that motivate the Commission's customers; to get feedback from customers on the Commission's services and products; to find out the customers' perceptions on the level of effectiveness and efficiency in service delivery; and to recommend interventions, measures and innovations that will enable the Commission to effectively and efficiently deliver improved services and products to its customers.*

In carrying out this survey, a three-pronged approach was employed which entailed desk research, quantitative face to face interviews and qualitative approach using Focus Group Discussions. While the quantitative face-to-face interviews were carried out with all the survey target groups, Focus Group Discussions mainly targeted consumers of ICT products and services.

According to survey results, the overall Customer Satisfaction Index (CSI) in the third wave of 2013 is 72.3 points out of the optimal 100 index points. Comparing the 2011/2012 and 2012/2013 overall Customer Satisfaction Index points, a significant increase in satisfaction index of **+1.3** points was recorded in the 2013 survey round. Increase in satisfaction was mainly

recorded amongst the suppliers (+3.3 points), licensees at (+1.6 points) and consumers (0.9%). On the other hand, an insignificant decrease in satisfaction of 0.7% was recorded amongst the *institutions category (government and government agencies, media, education institutions, partners, consumer organizations) (-0.7 points)*.



Suppliers and Licensees recorded the highest satisfaction index of **76.3** points and **76.0** points respectively while the institutions and consumers had lower satisfaction scores of **69.8** points and **67.6** points respectively in the 2013 survey round.

A Summary of Findings

A. Licensees

The licensees, as providers of services in the communications industry, are licenced and regulated by the Commission as part of its mandate. The survey sought to determine the extent to which licensees are satisfied with the manner in which the Commission discharges this mandate in relation to the said licensees and further measure their satisfaction with the Commission’s customer care function.

- I. **Relationship with the Commission:** Approximately four in ten (42%) of the licensees who participated have dealt with the Commission for more than 5 years while 43%

have had a relationship with the Commission for a period of between 1 to 5 years. Only 16% of those surveyed have been dealing with the Commission for less than one year.

- II. **Departments visited:** The Licensing Compliance and Standards department together with the Communications Consumer and Public Affairs department are the main departments visited by a majority of the surveyed licensees at 57% and 30% respectively.
- III. **Mode of communication:** Slightly more than four in ten of the surveyed licensees interact with the Commission through physical visits while one in every four mentioned interaction through email. Other modes of communication include: *website (11%), phone call (10%), social media (8%) and letter (4%)*. The preferred modes of interaction are e-mails (49%) and phone calls (23%).
- IV. **Roles and Mandate:** Licensees rated their overall satisfaction with the Commission on its role and mandate at approximately 71%, a marginal increase of +0.8% from the year 2011/2012. The key areas of improvement are *monitoring of activities of licensees to enforce compliance with the license terms and conditions as well as the law and licensing of the community service providers* which recorded increases of 1.9 and 2.4 percentage points respectively from the year 2011/2012 to 2012/2013. While the Commission has recorded improved satisfaction in these areas, licensees still feel that there is room for improvement especially on processes and procedures which they consider as lengthy and unnecessary during application for licences.
- V. **CCK staff:** The Commission's employees were rated by licensees at an overall satisfaction score of 77%, a significant improvement of +7.3% from 69.6% in the year 2011/2012 to 76.9% in the year 2012/2013. While all areas assessed under this category recorded improvements, the key areas that registered significant improvements are: *knowledge of the Commission's products and services* which recorded the highest improvement in satisfaction rating (+14.8%) and *technical skills to ensure efficient service delivery* (+8.4%). However, a key area of concern as indicated by at least two in ten of those surveyed is accessibility of staff which should be addressed by the Commission.
- VI. **Information and Communication:** Information and communication at the Commission recorded an overall satisfaction score of approximately 70% amongst the

licensees surveyed, a 1.1% decline from the year 2011/2012. While all key areas recorded a decrease in satisfaction rating, though insignificant, *consistency and dependability of information provided by the Commission to its stakeholders and timely provision of information and feedback to the Commission's stakeholders* recorded the lowest satisfaction rating as compared to others in the year 2012/2013. In this regard, when asked what key areas of service provision they would advise the Commission to concentrate on to ensure satisfied customers, information and communication was cited as the first priority and recorded a mention of approximately 40% by the survey respondents; 30% of the licensees surveyed cited the need for ensuring prompt response to queries and complaints raised by customers; 10% cited the need for frequent interaction with customers to ensure a properly functioning client-customer relationship to ensure enlightened, satisfied and loyal customers.

- VII. **Environment at CCK offices:** Overall satisfaction with the environment at the Commission's offices is approximately 86%, an overall improvement of 9.3% when comparing the overall satisfaction ratings of the years 2011/2012 and 2012/2013.
- VIII. **Invoicing and Payments:** Invoicing and receipts of payment from the Commission recorded an overall satisfaction score of approximately 73% in the year 2012/2013, an insignificant decline of 0.4 percentage points from the year 2011/2012. The lowest rated aspect of invoicing and receipts payments was *prompt response to complaints raised (71%)*. Under Information and Communication, licensees also called for the Commission to consider promptness in responses to queries and complaints raised by customers as a key area of concern that should be addressed in the year 2012/2013.
- a. Overall satisfaction of broadcasters with the Commission's service delivery is 79.6%, an improvement of +10.8 % from the year 2011/2012. The highest rated service area was *efficiency in approving the right equipment to be used by broadcasters* while the lowest rated was *efficiency in supporting Kenyans by ensuring fairness in the provision of broadcasting services*
 - b. Overall satisfaction index of telecommunication licensees with service delivery by the Commission is 77.4%. *Efficiency in ensuring good quality and variety of telecommunication services and preparing procedures and regulations on licensing of operators i.e. network facility operators, application service providers, and content service providers* recorded the highest satisfaction scores as

compared to other areas assessed. On the other hand, *development of adequate pricing guidelines by the Commission to ensure services are priced competitively and are affordable and ensuring that there is no discrimination in interconnection rates and services offered* recorded the lowest satisfaction rating

- c. Overall satisfaction of frequency licensees with service delivery channels at CCK is 77.7% in the year 2012/ 2013, an overall increase of 4.6% from the year 2011/2012. The highest rated area of service provision in the year 2012/2013 is *effectiveness by the Commission in coordinating international and regional frequency to avoid harmful interference of frequency users in different administrations* while the lowest rated area of service provision is *continuous revision of the frequency allocation table and availing of the schedule for public scrutiny*
- d. Overall satisfaction of postal and courier licensees with services by the Commission is 72.6% in the year 2011/2012.

B. Consumers.

Consumers of ICT products and services are the main beneficiaries of the information and communication services offered by communication service providers who are licensed and regulated by the Communications Commission of Kenya. In this regard, majority of the consumers interact with the Commission through third party arrangements while in certain instances, a few interact with the Commission directly.

Amongst the consumers, the survey sought to measure satisfaction with communication services provided on four fronts: *adequacy, affordability and accessibility of the services provided by licensees, adequacy of the customer care function (after sales services) as provided through customer care centres and operator assistance and/or call centres of service providers, the level of satisfaction with ethical business practices e.g. warranties, misleading advertising by licensees etc. and adequacy of information provided to the consumers when purchasing goods and services from the service providers.*

- I. Amongst consumers, there is a high level of awareness (93%) of the Communications Commission of Kenya (CCK) with Nairobi (99%) recording the highest level of

awareness while North Eastern (78%) recording the lowest level of awareness of the Commission. Whilst the television (85%) is the main source of information on CCK, other sources of information on CCK include; radio (78%), newspapers (47%), internet (16%) and billboards (13%). Further, the effect of word of mouth (9%) as a source of information cannot be undervalued since a considerable number of respondents attested to have heard of CCK from families, colleagues and friends. However, when asked through what sources they would like to receive information about the Commission, majority of those surveyed expressed a preference for the *Television* (80%). Other preferred sources of information on CCK are: radio (73%), newspapers (48%) and billboards (21%) in that order

- II. **Consumer rights:** The role of the Commission with regard to enforcing consumer rights recorded an overall mean Satisfaction Index of approximately 66%. Of the rights assessed, *'the right to truthful claims made about how items operate and where they were made must be true'* recorded the highest satisfaction score at 66.1% while *'the right to have access to basic communications services at reasonable prices'* recorded the lowest ratings at 62.7%.
- III. **Communication services:** Asked which key areas they are satisfied in with regard to communication services the consumers mentioned, *ease of accessibility and reliability (82%)* and *improved communication connectivity (28%)*, *advertising (20%)*, *impending digital migration (20%)* and *customer care service (19%)* were the main areas mentioned. On the other hand, areas of dissatisfaction with communication services are: *poor price regulation of various communication services (43%)*, *poor management of postal and courier services (27%)* and *complaint handling and conflict resolution techniques (26%)*.
- IV. **Satisfaction with Communication service providers:** The survey sought to assess satisfaction with the following communication services: *mobile phone services*, *landline/fixed telephone services*, *data/internet services*, *television services*, *radio services*, *postal and courier services*
 - a. Overall, consumers rated their satisfaction with mobile phone services at approximately 68%, an increment of approximately 8%. The highest rated service area is service availability and advertisements at approximately 71% while the lowest rated was pricing and complaint handling at approximately 64%.

- b. Overall satisfaction with fixed telephone services in the year 2012/2013 is approximately 66%, an increment of approximately 0.5%. The highest rated service area is service availability and advertisements at approximately 67% while the lowest rated was pricing and complaint handling at approximately 62%
- c. Overall satisfaction with data/ internet services is approximately 68%, an increment of approximately 3%. *Pricing and complaints handling* was rated the lowest at approximately 66% while the highest rated was availability and provision of information at approximately 69%.
- d. Overall satisfaction with television services is approximately 73%, an increment of approximately 3% from the year 2012. Advertisements and availability of television services was the highest rated at approximately 74% while the lowest rated was pricing and complaint handling at approximately 70%
- e. Overall satisfaction with radio services is approximately 76%, an increment of approximately 5%. *Availability and advertisements* were the highest rated services at approximately 77% while customer care was the lowest rated at approximately 74% in the year 2012/2013
- f. Overall satisfaction with postal services is approximately 62% in the year 2012/2013, an increment of approximately 2%. Customer care services and accessibility were the lowest rated areas with approximately 61% satisfaction rating. On the other hand, availability and pricing were the highest rated at approximately 62%
- g. Overall satisfaction with courier services is 62.2%, an increment of 1% with *accessibility and pricing* as the lowest rated services at approximately 61% while the highest rated were availability and reliability at approximately 63%

C. Suppliers

The Communications Commission of Kenya has suppliers who provide them with various goods and services as required. Unlike consumers, this category of customers interacts directly with the Commission. However, they do not directly benefit from the results of the Commission's regulatory interventions but mainly through the contractual engagements they have with the Commission.

Amongst this category of the Commission's customers, the survey sought to measure the suppliers' satisfaction with CCK mainly on two fronts: *the level of satisfaction with the Commission's customer care function and the level of satisfaction with the Commission's procurement, contracting and payment of goods and services.*

- I. **Relationship with the Commission:** A majority of the suppliers interviewed (54%) have been dealing with the Commission for over five years while approximately four in ten have been dealing with the Commission for between one to five years. Only 4% indicated that they have had a relationship with the Commission for less than one year.
- II. **Communication with the Commission:** One in every four of the suppliers interact with the Commission more than twice a month, while approximately two in ten interact with CCK on a monthly basis. The interaction with CCK is mainly through *physical visits (33%) and phone calls (29%)*. The main departments the suppliers interacted with are the Procurement department (54%), Finance and Accounts department (38%) and Communications and Public Relations department (33%).
- III. **Service provision:** Overall satisfaction amongst surveyed suppliers with regard to service provision at the Commission is approximately 74%. The main area of satisfaction is procedures put in place to ensure efficiency in service delivery (74%) while the main area of dissatisfaction is lack of involvement of stakeholders in planning and implementation of activities (70%).
- IV. **CCK's staff:** The Commission's staff received a satisfaction rating of approximately 77%. The key area that recorded the highest satisfaction is *staff's knowledge of CCK's products (78%)* while *ease of accessibility of staff (76%) and ability of staff to solve problems and give valuable advice (75%)* were rated the lowest as compared to others.
- V. **Information and communication at the Commission:** Overall, satisfaction with information and communication at CCK is approximately 69% in the year 2012/2013, a decrement of 0.7% from the year 2011/2012. Specifically, suppliers surveyed are mostly satisfied *with clarity of CCK's information and communication (70%)* while *timeliness of information and feedback to its stakeholders (suppliers) (67%)* together with *consistency and dependability of information given by CCK (69%)* recorded the lowest satisfaction scores
- VI. **Procurement services:** Overall satisfaction with procurement services at CCK is approximately 78%, an increment of approximately 7% from the 2011/2012 satisfaction score. The suppliers surveyed are mostly satisfied with the *non-conflicting feedback on tender results (81%), clarity of their adverts and unambiguity of the*

Commission's tenders (80%). On the other hand, prompt feedback on the results of its tender processes (75%) and prompt feedback on complaints raised with regards to tender processes (75%) recorded the lowest satisfaction scores as compared to other measurement areas under procurement services.

- VII. **Contracting services:** Overall satisfaction with contracting services at CCK is approximately 77% amongst surveyed suppliers. The suppliers surveyed highly scored *accuracy of contracts by CCK* at approximately 79% while the lowest rated was *CCK's fairness and promptness and efficiency in processing contract extensions* at approximately 76%.
- VIII. **Goods acceptance and payment services:** Overall satisfaction with goods acceptance and payment services at CCK is 72% as rated by the surveyed suppliers. The highest rated area is *adequacy and efficiency of modes of payments (73%)* while the lowest rated areas are *response to complaints raised (70%) and prompt payment of suppliers (70%)*
- IX. **Key areas of service improvements:** The areas of service provision that suppliers surveyed indicated as key in ensuring that they are satisfied are: *ensure a transparent tendering process (5%), clarity of advertisements (11%), ensure ease of access/availability of staff (11%), regular updates on CCK's activities (11%), ensure eradication of unnecessary bureaucratic contracting procedures (16%), efficient and impartial provision of services (41%), efficient communication and information provision (42%), prompt response to complaints and queries (63%).*

D. Partners and Affiliates

The Commission works closely with several other institutions key of which are: the media, government and government agencies, consumer organizations and affiliated international organizations. These institutions engage with the Commission through partnerships and/or as service recipients of ICT services.

Amongst this category of the Commission's customers, the survey sought to measure the extent to which these institutions are satisfied with the manner in which the Commission discharges its roles and mandates.

- I. A majority of the institutions that participated in the survey (57%) have dealt with CCK for a period ranging from one to five years while approximately 36% have had a relationship with the Commission for a period of more than 5 years. Only 6% of the institutions surveyed have been dealing with CCK for less than a year

- II. *Information Technology department (46%) and Consumers and Public Affairs department (55%)* form the main departments at the Commission that institutions surveyed mostly interact with. Other departments largely interacted with are *Licensing/Compliance and Standards department (15%), Broadcasting (12%), Frequency Spectrum Management (12%)*.
- III. The main mode of interaction between the institutions and the Commission is through email (38%). Other modes of interaction with the Commission are physical visit (25%), phone calls (22%), website visits (9%) and letters (3%).
- IV. **Roles and Mandate of the Commission:** Institutions surveyed rated their overall satisfaction with CCK on its roles and mandate at 65.9% in the year 2012/2013, a decrease of -0.8% from the year 2011/2012. The highest satisfaction scores were recorded in the Commission's roles in licensing of the communications service providers and facilitation of online/ electronic businesses (71%). On the other hand, institutions surveyed rated the Commission's roles on *management of Universal Access Fund (62%), management of competition in the sector to ensure a level playing ground for all players (62%)* and *protection of consumer rights within the communications environment (62%)* lowly as compared to other areas measured.
- V. **Social responsibility:** With regard to *social responsibility*, institutions surveyed rated the Commission at 61.7% in the year 2012/2013, approximately equal to the rating achieved in the year 2012/2013 (61.3%). Addressing of community needs and implementing projects in the community each recorded approximately 61% score in satisfaction.
- VI. **CCK's employees:** The Commission's employees were rated at an overall satisfaction score of 71% in the year 2012/2013, an increase of 0.4% from 2011/2012. The key areas of improvement are *knowledge of the Commission's products and services (from 66% in 2011/2012 to 74% in 2012/2013)* and *technical skills of staff to ensure efficiency in service delivery (from 72% in 2011/2012 to 76% in 2012/2013)*. On the other hand, the key areas that recorded lower satisfaction ratings as compared to other measurement areas are *offering of prompt services (65%)* and *ease of accessibility of the Commission's staff (68%)*.

- VII. **Information and communication at the Commission:** Overall satisfaction with information and communication at the Commission is 66.8% in the year 2012/2013, a 1.2% decline from the year 2011/2012. The key area that recorded a significant reduction in satisfaction is *flow of information between the Commission and its stakeholders (from 70% in 2011/2012 to 65.7% in 2012/2013)*. Compared to other measurement areas, *consistency and dependability of information provided by CCK* was rated the highest at approximately 68% while *efficient flow of information between CCK and its stakeholders* was rated the lowest at 65.7%. When asked which key areas they would advise the Commission to concentrate on to ensure satisfied customers, approximately 35% of the institutions cited *ensuring improved information and communication channels* while approximately two in ten cited the need for ensuring *promptness in addressing queries and complaints*.
- VIII. **CCK's environment:** Overall satisfaction with the Commission's environment is approximately 80% in the year 2012/2013, an increment of approximately 8% from the year 2011/2012.
- IX. **Service provision:** Service provision at the Commission recorded an overall satisfaction score of approximately 69% in the year 2012/2013, an increment of approximately 2% from the year 2011/2012. *Provision of reliable reports and reviews* recorded the highest satisfaction score of approximately 75% while *protection of rights of consumers with regard to price and quality of services* recorded the lowest at approximately 64%.
- X. **Key service improvement areas:** Asked which areas of service provision they are satisfied in, a majority of the institutions surveyed cited *CCK's role in advancement of technology (36%), impartiality in service delivery (23%) and good customer relations (23%)*. On the other hand, *the Commission's brand image (21%), obscurity and inadequate information (16%), customer protection (16%) and slow in response especially to complaints and queries (16%)* were cited as key areas of dissatisfaction. In this regard, the key areas that require attention as indicated by the institutions surveyed are *improving information and communication channels (35%), ensuring consumer rights are protected (24%) and ensuring prompt response to complaints & queries (21%)*.



Communications
Commission
of Kenya

Chapter 1. Introduction

1.1 The Survey Background

In today's fast paced world, gauging customer satisfaction is not only necessary for ensuring satisfaction and commitment, but it is also imperative for identifying key success factors. With the Kenya Government's adoption of performance contracts, conducting independent stakeholder assessments is mandatory as it is seen as an optimal gauge of fairly determining performance.

As mandated under sections 23, 46A, 47 and 83C of the *Kenya Information and Communications Act*, CAP 411A, the Commission serves to protect the users and consumers of communication services with regard to the prices charged the quality and variety of those services. The Commission has an indirect relationship with the end users through its licensees. It is only in cases where a consumer has a complaint which has not been resolved by the service provider that a direct link is established between the Commission and consumers.

In an attempt to meet its mandate, the Commission developed a service charter that serves as the basis for evaluating and reporting on its performance and as an important tool in maintaining its focus on client service outcomes. The charter outlines the service standards that the Commission intends to achieve.

In order to achieve optimal performance and retain high levels of satisfaction, the Commission has been gauging its customer satisfaction levels for the last four years (2008/2009, 2009/2010, 2010/2011 and 2011/2012). The key areas recommended for improvement in the previous years include: general awareness of CCK and their specific roles, and communication especially to the consumers. Licensees recommended for fair treatment across the board and timely and effective information and communication channels.

Further, in order for the Commission to improve its effectiveness and efficiency in carrying out its mandate in addressing the service needs of its stakeholders, it is critical that effective feedback mechanisms be developed and sustained to provide constant feedback for action.

To realize this important goal, the Commission contracted Infotrak Research and Consulting to conduct Customer Satisfaction Survey in order to determine the trend analysis in satisfaction levels and key areas of service that require improvement.

Chapter 2 The Methodology

2.1 The Research Methodology

2.1.1 Introduction

In carrying out this survey, a three-pronged approach was employed which entailed the following:

- i. *Desk research*, review of past survey reports and other relevant documents.
- ii. *Qualitative Approach*, employing use of *In-Depth Interviews (IDIs)* and *Focus Group Discussions (FGDs)*. Specifically, the in-depth interviews targeted the primary stakeholders that included but were not limited to broadcasters; postal/courier operators; licensees under Unified Licensing Regime; organizations with frequency licenses; telecommunications operators; telecommunication equipment vendors, and; Business Processing Outsourcing (BPO). The Focus Group Discussions (FGDs) mainly targeted the consumers.
- iii. *Quantitative Approach* employing *Face to Face (F2F)* interviews with consumers.

The survey, which was designed to measure the relative satisfaction levels on a broad range of indicators that influence service provision to the stakeholders, was carried out both nationally and at the institution level from May 20, 2013 to June 8, 2013. A breakdown of the achieved sample is as indicated herein below:

Target Group	Target	Sample Achieved	% Success Rate
Consumers	1655	1655	100%
Total	1655	1655	100%

Target Group	Target	Sample Achieved	% Success Rate
Partners and Affiliates Institutions	48	43	90%
Suppliers	49	42	86%
Licensees	226	202	89%
TOTAL	323	297	89%

Overall Success Rate			
Target Group	Target	Sample Achieved	% Success Rate
Total (All customers/stakeholders)	1978	1942	98%

2.1.2 Sampling Frame

In the selection of clusters targeting the consumers, the 2009 Kenya Population and Housing Census frame was used. Census enumeration sub-locations were defined as the Primary Sampling Units (PSUs) and were selected from each of the sampling sub-domains (districts) by using a combination of random and systematic Probability Proportional to Size (PPS) sampling procedures, based on the estimated population sizes of the Enumeration Districts (EDs) from the 2009 census frame. Thus in targeting the consumers, a total of 25 counties and 31 districts were included in the sample.

The sampling frame for the other target groups (licensees, suppliers and partner institutions) were provided by the Commission. These were included in the frame through random and systematic sampling.

2.1.3 Sample Design

In designing the sample for the consumers, a multi-stage, stratified cluster sampling approach was used for the selection of the survey sample. The first procedure entailed categorization of the target population into old provinces as the main domains or strata to enable the sample to be spread across all regions and population subgroups. The counties and the districts were then identified at the first and second stages of sampling; the selection of the Primary Sampling Units (the sub-locations) was carried out at the third stage of sampling and the household selection in the last stage of sampling.

2.1.4 Research Instruments

Questionnaires based on the Customer Satisfaction Survey objectives adopted both open and closed ended questions were developed and administered among interest groups that include; *consumers, licensees, suppliers and partner institutions*. Previous Customer Satisfaction Surveys conducted by the Commission were reviewed and used in development of the tools used in this survey.

The key areas that were assessed through the developed questionnaires include; *awareness and knowledge of CCK's roles and mandate, sources of information on CCK, media preferences for receiving information about CCK, satisfaction with CCK's performance in executing its roles and mandate, satisfaction with communication service providers, satisfaction with CCK's environment, suggestions for improvement of customer service provision.*

2.1.5 Data Collection, Processing and Analysis

Prior to the actual fielding of the survey, the developed questionnaires and Focus Group Discussion (FGD) guides were pre-tested in order to highlight any errors in content, wording, structure, response categories, 'skip patterns' and formatting. The modified questionnaires and guides, based on the results of the pre-test, were thereafter administered to respondents during the actual fielding exercise by experienced research assistants mainly through face-to-face interviews and group discussions.

Sequentially, data processing mainly entailed preparation of a codebook, setting up of data structure, entering data and screening data for errors. A codebook acts as a guide for coding responses and also provides documentation of the layout and code definitions of the data file. Setting up of data structure through preparation of a data entry screen allowed for entry of the collected information. Prior to this, the fielded and completed questionnaires were edited, both in the field and at the data centre, to minimise errors. Data was entered using CSPro 5.0.2 which has a range of capabilities that include: consistency checks and skip patterns, manipulation of data and independent verification of data to ensure accuracy of the data entry operation. Once all the survey responses were transferred to electronic format, data validation was carried out to ensure clean data. Data analysis of the data collected through face-to-face interviews was carried out using IBM SPSS¹ Statistics software. This mainly involved exploration of data through generation of descriptive statistics and accompanying graphs. Further analysis though exploring relationships between variables and groups was carried out.

On the other hand, data collected through group discussions was analysed using a two-step process: **focussed-analysis** that entails reviewing the purpose of the survey and organizing the data by question or topic or survey objective to allow the analyst to look across all respondents and their answers in order to identify consistencies or/and differences; and **categorization** which serves to bring meaning to the organized data through identifying patterns/ themes

¹ Statistical Product and Service Solutions

(ideas, concepts, behaviour, interactions etc.) and further organize the information into coherent categories.

2.1.6 Analysis and Computation of Customer Satisfaction Index

In developing the Customer Satisfaction Index, the perceived level of importance of the Commission's customers was determined mainly based on the level of interaction that the customers have with the Commission. The Commission considers the licensees who they interact with directly as its main customers and therefore attaches a very high level of importance to this category of customers. The second most important group of customers who again interact directly with the Commission are the suppliers. The third and fourth most important groups of customers are the partner institutions and consumers respectively. The consumers mainly interact with the Commission through third party arrangements i.e. through communication service providers who in turn interact with the Commission directly.

Thus four weighting factors were allocated to the four derived groups of the Commission's customers depending on their perceived level of interaction with the Commission. These customer categories are; *Very High Priority Customer group (Licensees)*, *High Priority Customer group (Suppliers)*, *Priority group (Institutions)* and *Priority Customer group (Consumers)*.

The perceived level of importance attached to the four derived customer groups is shown in the table below.

Derived Customer Group	Customer category	Level of importance
Very high priority	Licensees	0.65
High priority	Suppliers	0.15
Priority	Institutions	0.10
Priority	Consumers	0.10

In this regard, the simple linear model used to arrive at the overall Customer Satisfaction Index is illustrated below:

Overall Customer Satisfaction Index

$$= \left\{ 0.65 \frac{\sum_{vvhp=1}^m w_{vvhp}}{m} + 0.15 \frac{\sum_{vhp=1}^n x_{vhp}}{n} + 0.10 \frac{\sum_{hp=1}^o y_{hp}}{o} + 0.10 \frac{\sum_{p=1}^q z_p}{q} \right\}$$

where; *vvhp* is very very high priority indicator;

vhp is very high priority indicator;

hp is high priority indicator;

p is priority indicator;

w_{vvhp} is customer satisfaction score for Licensee *vvhp* and *m* is the total number of licensees surveyed

x_{vhp} is customer satisfaction score for Supplier *vhp* and *n* is the total number of suppliers surveyed

y_{hp} is customer satisfaction score for consumer *hp* and *o* is the total number of partner institutions surveyed

z_p is customer satisfaction score for Partner institution *p* and *q* is the total number of consumers

Chapter 3 The Survey Findings

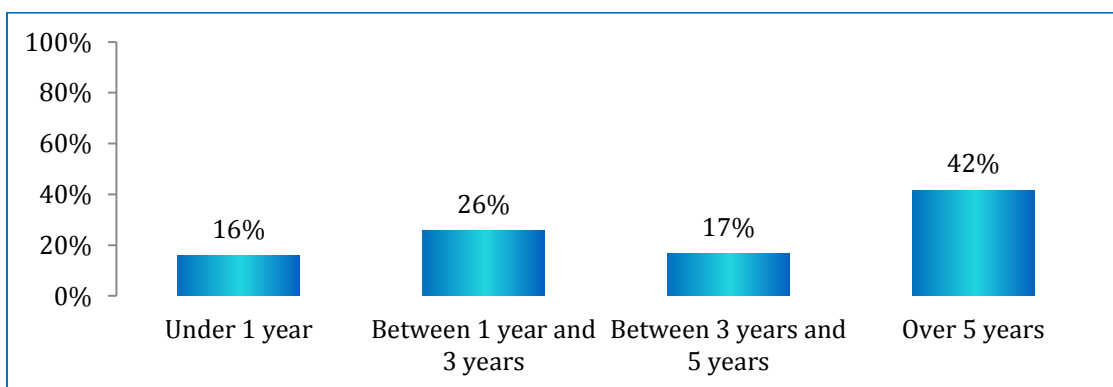
3.1 Licensees

The licensees, as providers of services in the communication sector, are licenced and regulated by the Commission as part of its mandate. The survey sought to measure the extent to which licensees are satisfied with the manner in which the Commission discharges this mandate in relation to the said licensees and further measure their satisfaction with the Commission’s customer care function.

Amongst the licensees, eight key areas of service provision that have an effect on their satisfaction with the Commission were assessed. These are: *length of relationship between licensees and the Commission, roles and mandates of the Commission, the Commission’s staff / employees, information and communication, the Commission’s environment and payments (invoices and receipts) and satisfaction with provision of services to broadcasting service licensees, telecommunication service licensees, frequency licensees and postal and courier licensees.*

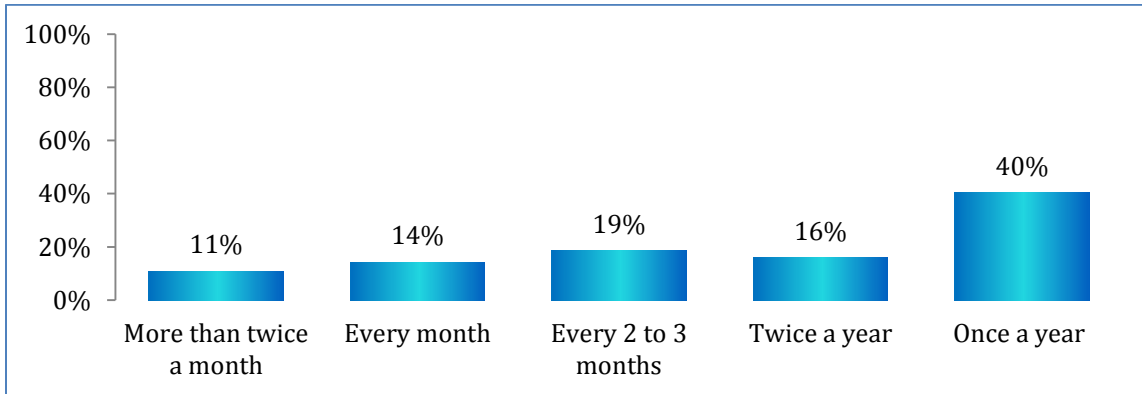
3.1.1 Relationship with Communications Commission of Kenya (CCK)

A higher proportion of licensees (42%) who participated in the survey indicated that they have dealt with the Commission for more than 5 years while 43% have had a relationship with the Commission for a period of ranging from one to five years. Only 16% of those surveyed have been dealing with the Commission for less than one year. *(See the chart below)*



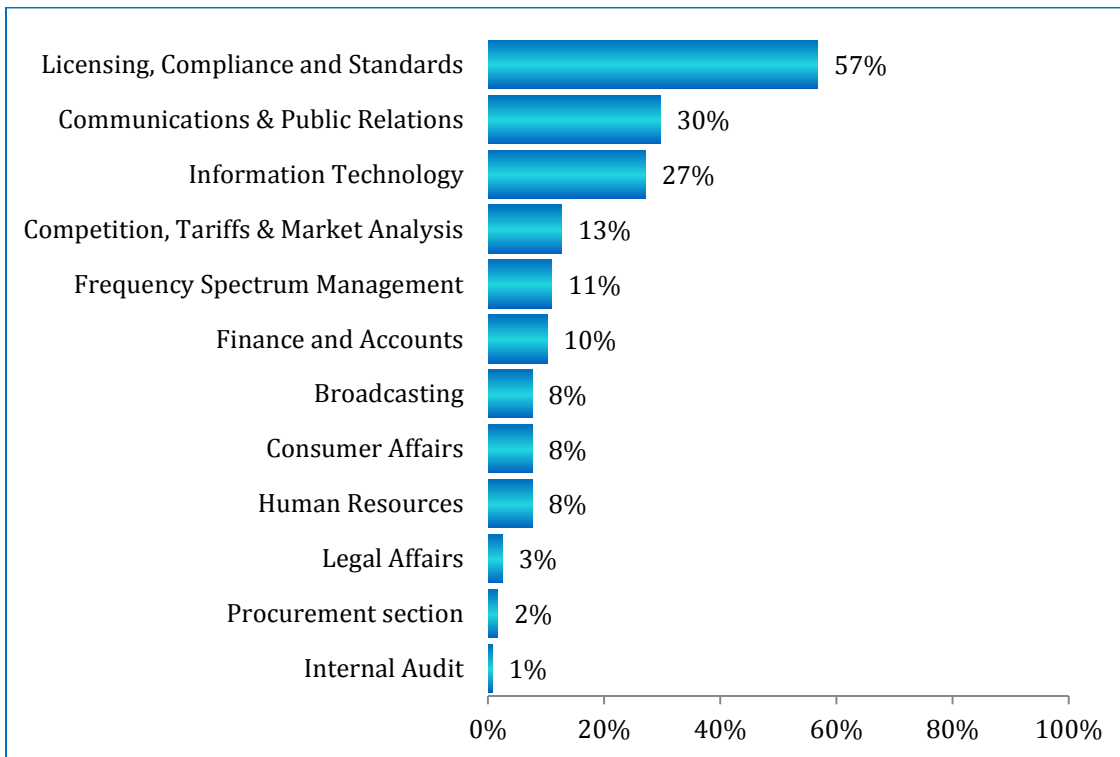
How long has your organization dealt with the Communications Commission of Kenya?

Whilst majority of the licensees (56%) surveyed interact with CCK one to two times a year, approximately one in every four interact with the Commission at least once to several times a month. Approximately two in ten of the licensees indicated that they interact with CCK every two to three months. (See the chart below)



How often do you interact with the Communications Commission of Kenya?

With regards to the departments interacted with; *Licensing, Compliance and Standards department (57%)* together with the *Consumer and Public Affairs (30%)* department are the main departments visited by a majority of the surveyed licensees. Other departments visited include: *Internal Audit, Procurement section, Legal Affairs, Human Resources, Consumer Affairs, Broadcasting, Finance and Accounts, Frequency Spectrum Management, Competition, Tariffs and Market Analysis and Information Technology.* (See the chart below)

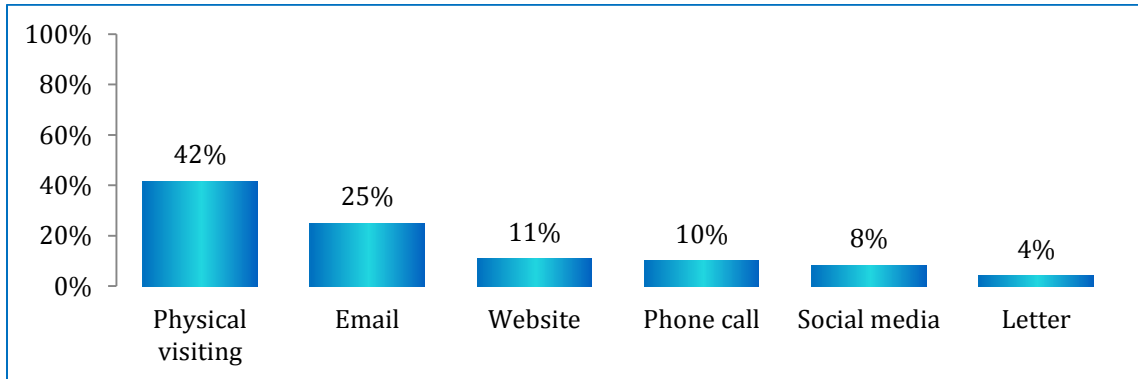


Which office within CCK do you interact with?

The number of departments one interacts with seems to be dependent on the number of years one has had a relationship with the Commission. Licensees who have had over five year's relationship with the Commission interact with more departments as compared to those who have had less than one year interaction with the Commission. (See the table below)

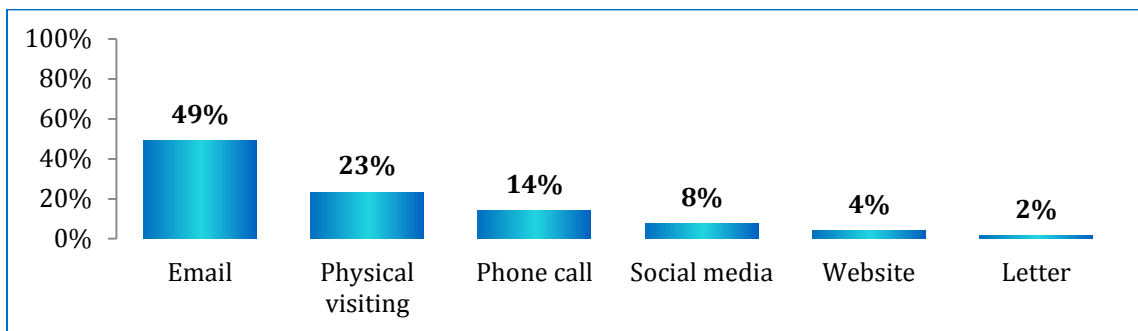
Which Department/office within CCK do you interact with?	How long have you had a relationship with the Communications Commission of Kenya?			
	Under 1 year	Between 1 year and 3 years	Between 3 years and 5 years	Over 5 years
Licensing, Compliance and Standards	61%	50%	40%	66%
Consumer and Public Affairs	17%	33%	40%	46%
Information Technology	33%	33%	50%	12%
Competition, Tariffs and Market Analysis	6%	0%	15%	22%
Frequency Spectrum Management	0%	0%	20%	18%
Finance and Accounts	6%	0%	5%	20%
Human Resources	6%	3%	10%	10%
Broadcasting	0%	3%	5%	14%
Legal Affairs	0%	0%	0%	6%
Procurement section	0%	0%	0%	4%
Internal Audit	6%	0%	0%	0%

With regard to means of interaction, more than four in ten of the surveyed licensees indicated that they interacted with the Commission through physical visiting while one in every four mentioned interaction through email. Other modes of communication include: *website, phone call, Social Media and letter.* (See the chart below)



Through what means did you interact with CCK?

However, when asked through what means they would prefer to interact with CCK, nearly half of the surveyed licensees cited email while one in every four cited phone call. (See the chart below)



Through what means would you prefer to communicate/interact with CCK?

3.1.2 Satisfaction with CCK's Roles and Mandate

Licensees rated their overall satisfaction with the Commission on its role and mandate at 70.9 points out of a possible 100 points, thus a marginal increase of +0.8 percentage points from the year 2011/2012. (See the table below)

Roles and Mandates of CCK	Year 2012	Year 2013
Licensing of the communication service providers	73%	75.4%
Management of the country's frequency spectrum and numbering resources	70%	70.9%
<i>Facilitation of online/electronic businesses</i>	<i>69%</i>	<i>67.9%</i>
Approval and acceptance of the communications equipment meant for use in	70%	70.9%

the country		
Protection of consumer rights within communication environment	70%	69.5%
<i>Management of competition in the sector to ensure a level playing ground for all players</i>	<i>68%</i>	<i>68.3%</i>
Regulation of telecommunication tariffs	70%	70.3%
<i>Management of Universal Access Fund</i>	<i>70%</i>	<i>68.7%</i>
Monitoring of activities of licensees to enforce compliance with the license terms and conditions as well as the law	72%	73.9%
Overall Satisfaction Index on roles and mandate	70.1%	70.9%

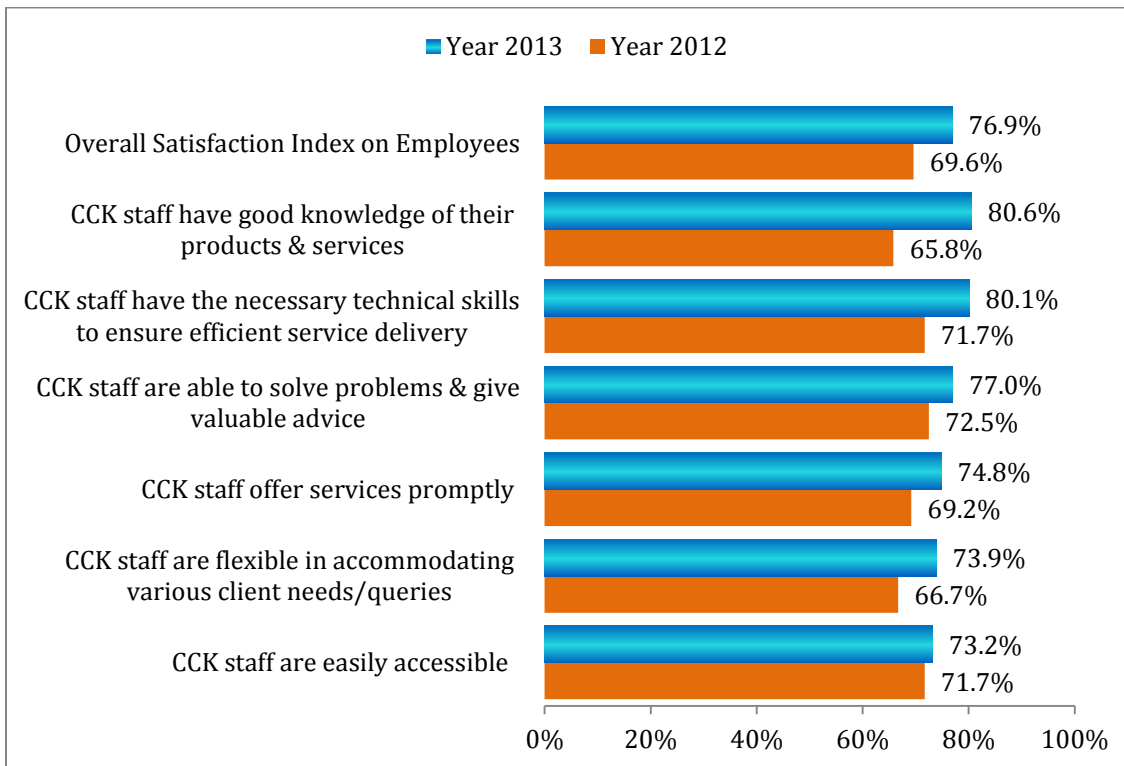
Overall, on a scale of 1 – 10 where 1 is very dissatisfied and 10 is very satisfied, how would you rate your satisfaction with CCK's main role as Kenya's regulator for the information and communications sector?

The key areas of improvement in this regard are monitoring of activities of licensees to enforce compliance with the license terms and conditions as well as the law and licensing of the communication service providers which recorded increases of 1.9 and 2.4 percentage points respectively from the year 2011/2012 to 2012/2013.

While the Commission has recorded improved satisfaction in these areas, licensees still feel that there is room for improvement especially on processes and procedures which they consider as lengthy and unnecessary during application for licences. Approximately three in ten of the licensees surveyed (27%) cited reduction or eradication of unnecessary licencing processes and procedures as a key area of service provision that should be addressed by the Commission.

3.1.3 Satisfaction with CCK's Employees

The Commission's employees were rated by licensees at an overall satisfaction score of 76.9 points out of the optimal 100 points. This reflects a significant improvement of +7.3 percentage points in satisfaction rating of the Commission's staff from 69.6% in the year 2011/2012 to 76.9% in the year 2012/2013. *(See the chart below)*



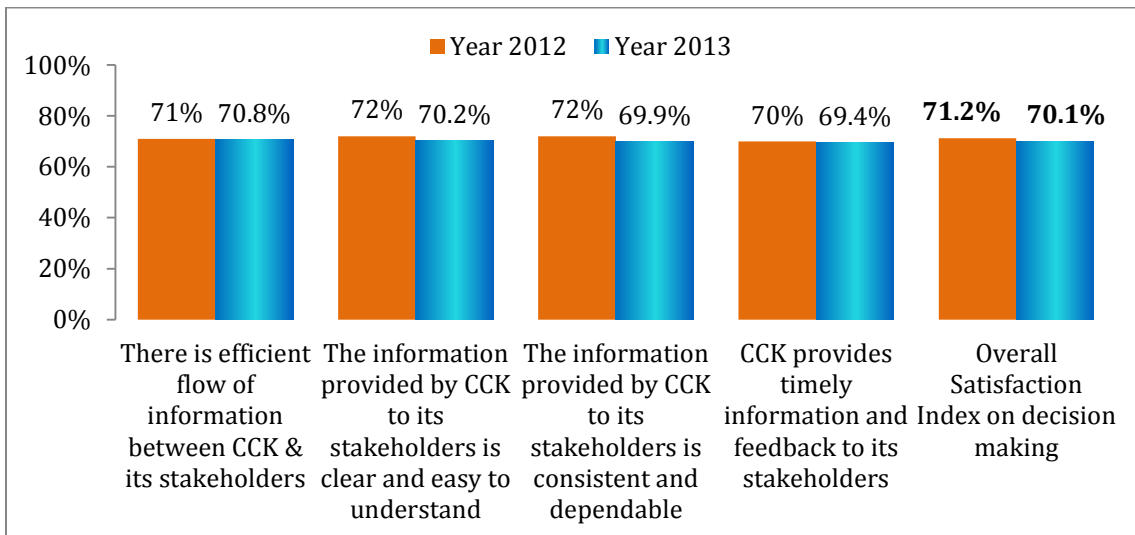
On a scale of 1 – 10 where 1 is very poor and 10 is very good, how would you rate the following aspects with regard to CCK as an institution?

While all areas assessed under the Commission’s employees for the year 2012/2013 recorded improvements, the key areas that registered significant improvements are: *knowledge of the Commission’s products and services* which recorded the highest improvement in satisfaction rating (+14.8 percentage points) and *technical skills to ensure efficient service delivery* (+8.4 percentage points).

On the other hand, accessibility of staff is still a key area that needs to be addressed since for the second year running, it recorded lower satisfaction scores as compared to other areas of measurement. This is confirmed by licensees surveyed as a key area of concern with at least two in ten of those surveyed citing it as one of the key service touch points that the Commission should work on to ensure that their customers are satisfied.

3.1.4 Satisfaction with information and Communication at CCK

Information and communication at CCK recorded an overall satisfaction score of 70.1 points out of the optimal 100 points amongst the licensees surveyed, thus a -1.1 percentage points decline from the year 2011/2012. *(See the chart below)*



On a scale of 1 -10 where 1 is totally disagree 10 totally agree, how would you rate your agreement/disagreement with regard to the following aspects of information and communication at CCK?

While all key areas recorded a decrease in satisfaction rating, though insignificant, *consistency and dependability of information provided by the Commission to its stakeholders* and *timely provision of information and feedback to the Commission’s stakeholders* recorded the lowest satisfaction rating as compared to others in the year 2012/2013.

The importance of information and communication in service provision cannot be overemphasized. When asked what key areas of service provision they would advise the Commission to concentrate on to ensure its customers are satisfied, information and communication was cited as the first priority and recorded a mention of approximately 40% by the survey respondents. A further 30% of the licensees surveyed indicated the need for ensuring prompt response to queries and complaints by the Commission; a function of information and communication.

In addition, approximately 10% of the licensees who participated in this survey cited the need for frequent interaction with customers to ensure a properly functioning client-customer relationship to ensure enlightened, satisfied and loyal customers.

3.1.5 Satisfaction with CCK’s environment

Overall, licensees rated their overall satisfaction with the environment at the Commission’s offices at 86.1 points out of the optimal 100 points, an improvement of 9.3 percentage points from the satisfaction rating achieved in the year 2011/2012.

The table below shows a comparative analysis of satisfaction levels of licensees with all the attributes of environment at the Commission's offices that were measured in the years 2011/2012 and 2012/2013.

Environment Aspect	Year 2012	Year 2013
Cleanliness/tidiness	77%	90.0%
Security of CCK offices	78%	87.3%
Interior design and ambience	79%	86.8%
Adoption and use of technology	78%	86.2%
Office labelling/directory services	76%	84.9%
Accessibility of CCK offices	77%	83.7%
Staff diversity e.g. gender, ability	76%	81.9%
Overall Environment	78%	87.9%
Overall Satisfaction Index on Environment	77.3%	86.1%

On a scale of 1 -10 where 1 is very dissatisfied and 10 very satisfied, please indicate the extent to which you are satisfied with the following statements on CCK corporate values and image

3.1.6 Satisfaction with Invoicing and Receipt payments

Overall satisfaction of licensees with the invoicing and receipts of payment from the Commission is 72.6% in the year 2012/2013. This is an insignificant decrement of 0.4 percentage points when compared to the satisfaction score in the year 2011/2012. (See the table below)

Invoicing and Receipt of Payments	Year 2012	Year 2013
CCK's mandate of payment are adequate and efficient	75%	73.4%
CCK processes invoices promptly	74%	72.5%
CCK is unbiased in handling of invoicing and receipt payment processes	73%	72.4%
CCK responds to complaints regarding invoicing and receipt of payment promptly	71%	71.4%
Overall Satisfaction on Invoicing and Receipt of Payments	73.0%	72.6%

On a scale of 1 -10 where 1 is strongly disagree and 10 strongly agree, to what extent do you agree with the following statements with regards to invoicing and receipt of payment services by CCK?

Thus, when compared to other areas of measurement, the lowest rated aspect of invoicing and receipts payments was 'prompt response to complaints raised' which had a satisfaction score of 71.4%. This is in line with the survey findings as captured under information and communication where licensees called for the Commission to consider promptness in responses to queries and complaints raised by customers as a key area of concern that should be addressed in the year 2012/2013.

3.1.7 Satisfaction with provision of services to licensees

I. Broadcasters

Overall satisfaction of broadcasters with the Commission's service delivery is 79.6%. This reflects an improvement of +10.8 percentage points from the year 2011/2012. The highest rated service area was efficiency in *approving the right equipment to be used by broadcasters* at 81.7% while the lowest rated was *efficiency in supporting Kenyans by ensuring fairness in the provision of broadcasting services* at 76.3%.

The table below shows a comparative analysis of satisfaction scores on service delivery as rated by broadcasting licensees for the years 2011/2012 and 2012/2013.

CCK's service delivery	Year 2012	Year 2013
CCK efficiently approves the right equipment to be used by broadcasters	67%	81.7%
CCK efficiently handles complaints in the broadcasting industry e.g. interference, overlap of frequencies etc.	67%	80.7%
CCK is efficient in renewals of licenses	67%	80.4%
CCK efficiently ensures adequate delivery of additional frequencies	71%	79.9%
CCK is efficient in frequency allocation	69%	79.8%
CCK has adequately embraced modern technology in facilitating the provision of broadcasting services	71%	79.6%
CCK is responsive to the broadcasting needs of the market	67%	79.6%
CCK efficiently controls the quality/content/language of radio programmes	70%	79.3%
CCK efficiently controls the quality and content of programmes aired on TV	67%	79.3%
CCK is fair in assigning of frequencies to broadcasters	72%	79.2%
CCK is efficient in supporting Kenyans by ensuring fairness in the provision of broadcasting services	70%	76.3%
Overall Mean Satisfaction	68.8%	79.6%

On a scale of 1 -10 where 1 is strongly disagree and 10 strongly agree, to what extent do you agree with the following statements with regards to the provision of broadcasting services by CCK?

II. Telecommunication Service Licensees

Overall satisfaction index of telecommunication licensees with service delivery by the Commission is 77.4%. Compared to other service areas assessed, *efficiency in ensuring good quality and variety of telecommunication services (82.4%)* and *in preparing procedures and regulations on licensing of operators i.e. network facility operators, application service providers,*

and content service providers (80.7%) recorded the highest satisfaction ratings. On the other hand, the key service areas that recorded lower satisfaction areas as compared to others are development of adequate pricing guidelines by the Commission to ensure services are priced competitively and are affordable and ensuring that there is no discrimination in interconnection rates and services offered.

The table below shows a comparative analysis of satisfaction scores on service delivery as rated by telecommunication service licensees for the years 2011/2012 and 2012/2013.

CCK's service delivery	Year 2012	Year 2013
CCK is efficient in ensuring good quality and variety of telecommunication services	72%	82.4%
CCK efficiently prepares procedures and regulations on licensing of operators i.e. Network Facility Operators, Application Service Providers, and Content Service Providers	75%	80.7%
CCK efficiently handles complaints in the telecommunications industry e.g. interference etc.	75%	79.5%
CCK effectively maintains and promotes competition between persons engaged in commercial activities connected with telecommunication services in Kenya	72%	79.3%
CCK efficiently enforces all license conditions and regulations	74%	78.8%
CCK promptly processes application for number assignments	72%	77.2%
CCK efficiently reviews the sector on a continuous basis to ensure that competition is fostered	73%	76.6%
CCK adequately encourages private investment in the telecommunications sector	73%	76.6%
CCK has developed adequate mechanisms to ensure availability of telecommunications services to all citizens throughout the country	73%	76.6%
CCK efficiently manages the demand for numbering resources by development of comprehensive national numbering plans	73%	76.5%
CCK efficiently manages the assignment of numbering resources	72%	76.0%
CCK has ensured that operators agree on favourable interconnection terms	70%	74.9%
CCK has developed adequate pricing guidelines to ensure services are priced competitively and are affordable	70%	74.5%
CCK has ensured that there is no discrimination in interconnection rates and services offered	70%	74.5%
Overall Satisfaction Index on service delivery	72.4%	77.4%

On a scale of 1 -10 where 1 is strongly disagree and 10 strongly agree, to what extent do you agree with the following statements with regards to the provision of Telecommunication services by CCK?

III. Frequency Licensees

Overall satisfaction of frequency licensees with service delivery channels at CCK is 77.7% in the year 2012/ 2013, thus an overall increase of 4.6 percentage points from the year 2011/2012. The highest rated area of service provision in the year 2012/2013 is effectiveness by the Commission in coordinating international and regional frequency to avoid harmful interference of

frequency users in different administrations (80.2%) while the lowest rated area of service provision is continuous revision of the frequency allocation table and availing of the schedule for public scrutiny (75.7%).

The table below shows a comparative analysis of satisfaction scores on service delivery as rated by frequency licensees for the years 2011/2012 and 2012/2013.

CCK's service delivery	Year 2012	Year 2013
CCK effectively coordinates international and regional frequency to avoid harmful interference of frequency users in different administrations	74%	80.2%
CCK ensures efficient utilization of the spectrum resource through frequency allocation, planning, monitoring and inspections	74%	78.8%
CCK consistently carries out spectrum utilization audit to establish the allocations and the use of the resource	73%	77.7%
CCK efficiently carries out national coordination to ensure harmonious sharing of frequencies by various users and services	74%	76.2%
CCK continuously revises the frequency allocation table and avails the schedule for public scrutiny	71%	75.7%
Overall Mean Satisfaction	73.1%	77.7%

On a scale of 1 -10 where 1 is strongly disagree and 10 strongly agree, to what extent do you agree with the following statements with regards to the provision of frequency services by CCK?

IV. Postal and Courier Licensees

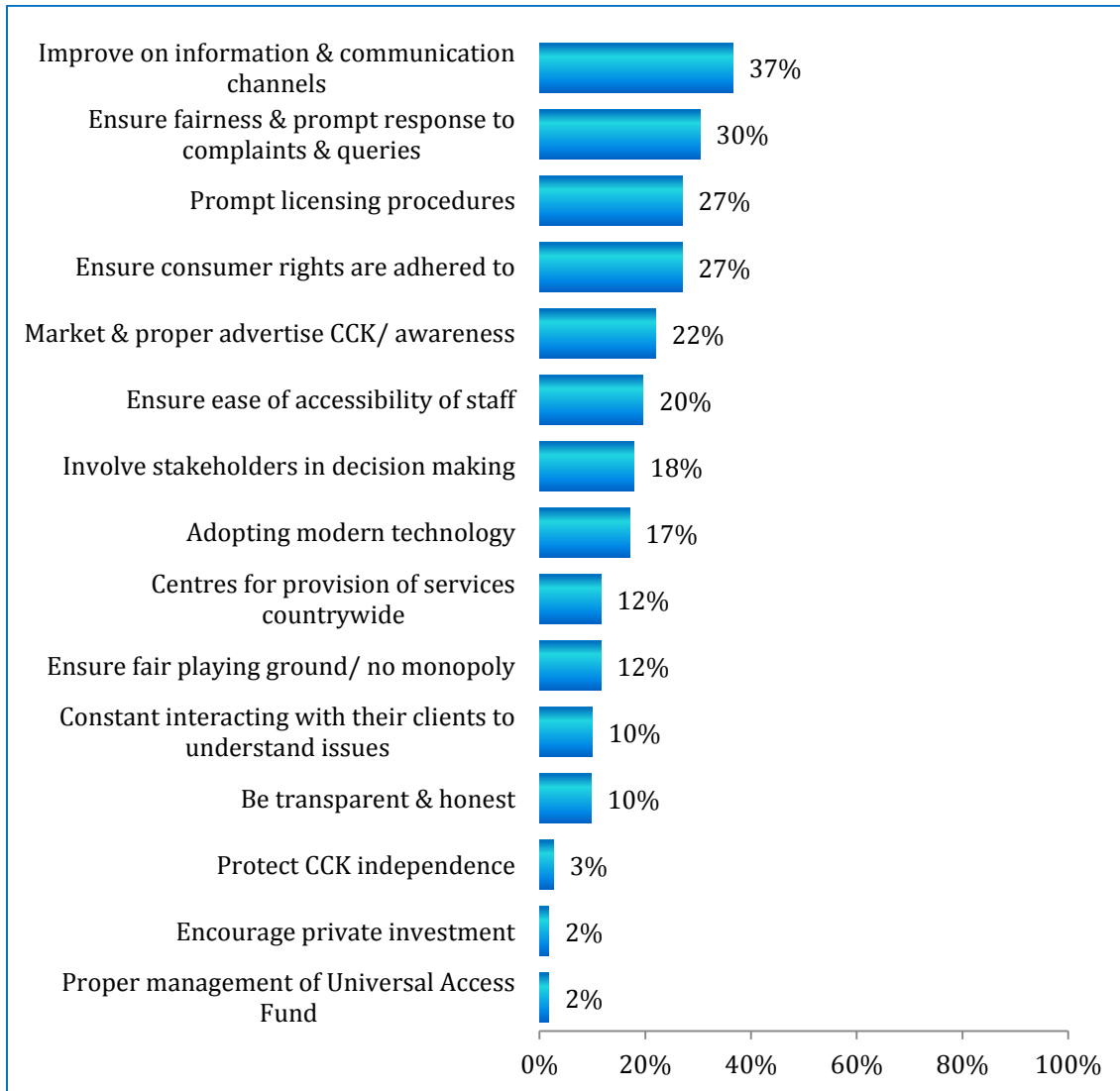
Overall satisfaction of postal and courier licensees with services by the Commission is 72.6% in the year 2011/2012. The table below shows a comparative analysis of satisfaction scores on service delivery as rated by postal and courier licensees for the years 2011/2012 and 2012/2013.

CCK's service delivery	Year 2012	Year 2013
CCK efficiently ensures that there are good and sufficient postal and courier services throughout Kenya	75%	73.3%
CCK adequately promotes development of postal systems and services in accordance with recognized international standards, practices and public demand	76%	73.3%
CCK efficiently regulates the fixing of rates of postage and other fees or sums to be charged in respect of postal services	75%	73.2%
CCK efficiently manages postal services rates that ensures efficient and continuous service and financing viability of the provider	75%	70.6%
Overall Mean Satisfaction	75.3%	72.6%

On a scale of 1 -10 where 1 is strongly disagree and 10 strongly agree, to what extent do you agree with the following statements with regards to the provision of postal and courier services by CCK?

3.1.8 Key improvement areas

Asked what key areas of service provision they would advise the Commission to concentrate to ensure that the Commission’s customers are satisfied, at least two in ten of the licensees surveyed cited the need for the Commission to: *ensure ease of accessibility of staff; ensure proper awareness raising of its roles, mandate and activities; ensure consumer rights are adhered to; ensure prompt licensing procedures; ensure fair and prompt response to complaints and queries; and improve on information and communication channels.*



Assuming that you are the Director General of the Communications Commission of Kenya (CCK), which THREE key areas of service provision would you concentrate on to help ensure that you as a customer is very satisfied?

3.1.9 Overall Satisfaction (Licensees)

Area	Year 2011/2012		Year 2012/2013	
	Unweighted CSI %	Weighted CSI %	Unweighted CSI %	Weighted CSI %
CCK Environment	77.3	79.4	83.5	86.1
Provision of services to postal and courier licensees	75.3	77.4	70.4	72.6
Provision of services to frequency licensees	73.1	75.2	75.4	77.7
Invoicing and receipt payment	73.0	75.1	70.4	72.6
Provision of services to telecommunications licensees	72.4	74.5	75.1	77.4
Information and Communication at CCK	71.2	73.3	67.9	70.1
Roles and Mandates of CCK	70.1	72.2	68.8	70.9
Professionalism of CCK Employees	69.6	71.7	74.6	76.9
Provision of services to broadcasting licensees	68.8	70.9	77.2	79.6
Overall Mean Satisfaction Index	72.3	74.4	73.7	76.0

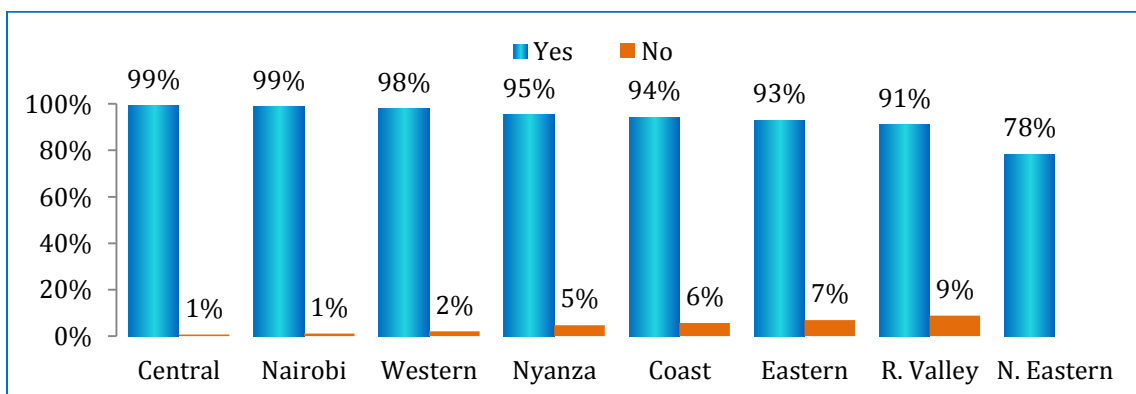
3.2 The Consumers

The consumers are the main beneficiaries of the information and communication services offered by communication service providers who are licensed and regulated by the Communications Commission of Kenya. In this regard, majority of the consumers interact with the Commission through third party arrangements while in certain instances, a few interact with the Commission directly.

Amongst the consumers, the survey sought to measure satisfaction with communication services provided on four fronts: *adequacy, affordability and accessibility of the services provided by licensees, adequacy of the customer care function (after sales services) as provided through customer care centres and operator assistance and/or call centres of service providers, the level of satisfaction with ethical business practices e.g. warranties, misleading advertising by licensees etc. and adequacy of information provided to the consumers when purchasing goods and services from the service providers.*

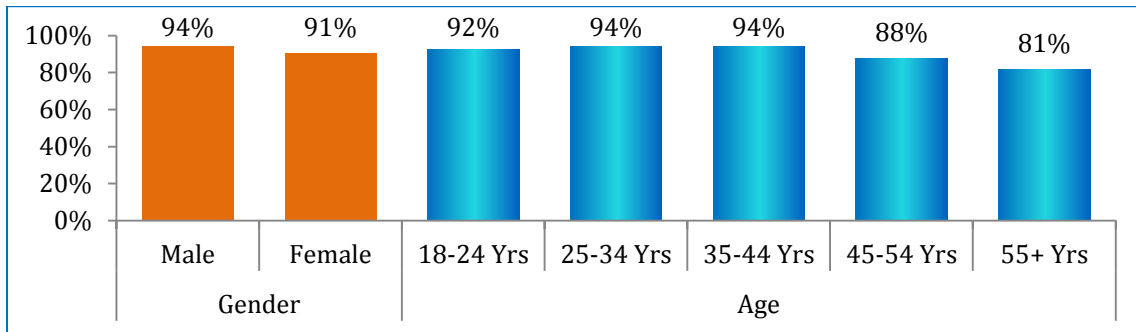
3.2.1 Knowledge and Awareness of Communications Commission of Kenya (CCK)

Amongst the consumers, there is a high level of awareness (93%) of the Communications Commission of Kenya (CCK) which is an insignificant decline from year 2012 which was 97%. A cross analysis by region shows that consumers surveyed in Nairobi and Central had the highest level of awareness while survey respondents in North Eastern recorded a lower level of awareness as compared to all other regions.



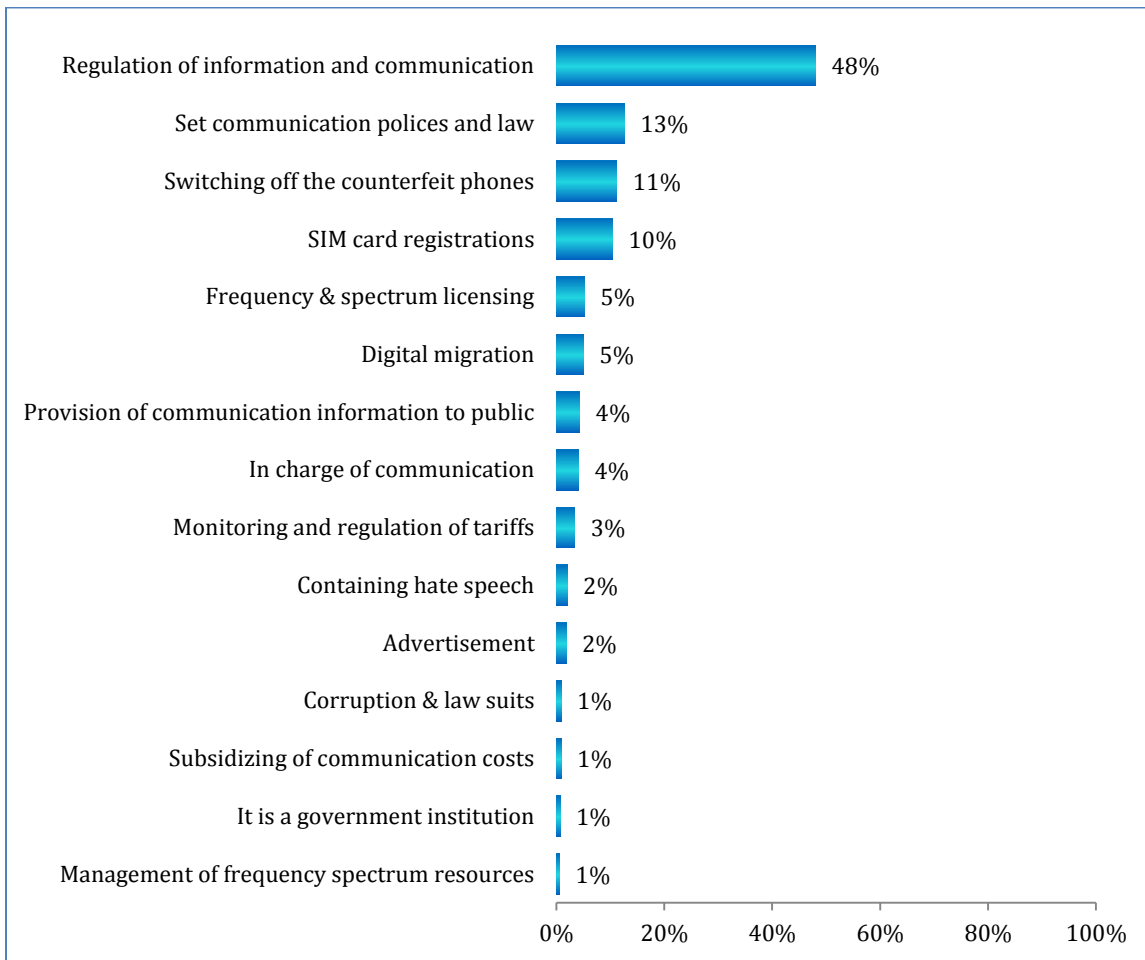
Are you aware of the Communications Commission of Kenya (CCK)? n = 1655

Level of awareness of CCK across gender is comparatively equal while analysis by age group shows that the upper age groups of 45 – 54 and 55+ recorded lower levels of awareness of CCK as compared to the lower age groups. This is depicted in the chart below.



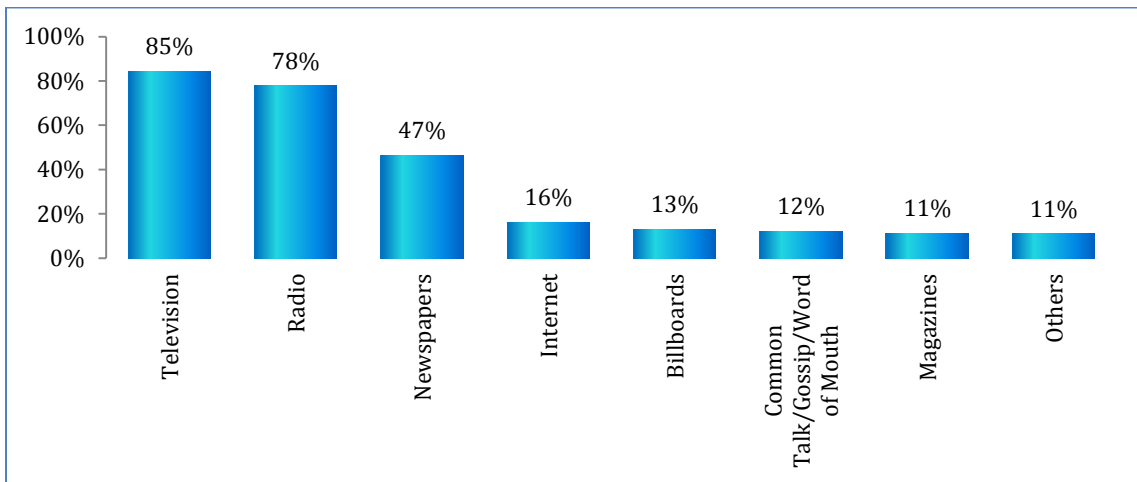
Awareness of the Communications Commission of Kenya (CCK) by Gender and Age (n = 1539)

The Commission is associated with a wide array of issues, mainly inclined towards its roles and mandate. As shown in the chart below, nearly half of the respondents mainly associate the Commission with regulation and management of information and communication services. Other key associations of CCK include; *setting communication laws and policies and management of phones and SIM card usage (21%), frequency and spectrum licensing (5%) among others.*



When you hear of Communications Commission of Kenya (CCK), what comes to mind? n = 1562

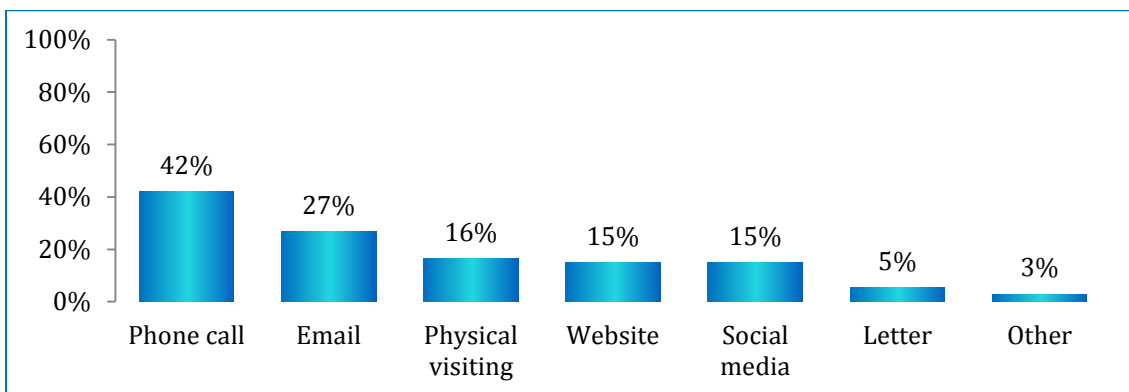
Broadcast media, especially TV was the most mentioned medium through which the focus group respondents attested to have obtained their awareness about CCK. They also learned of the Commission through newspapers and radio. However, the effect of the word of mouth cannot be under estimated since a good number of the focus group respondents attested to have heard of CCK from families, colleagues and friends.



Through what sources of information did you hear about the Communications Commission of Kenya (CCK)?
n = 1655

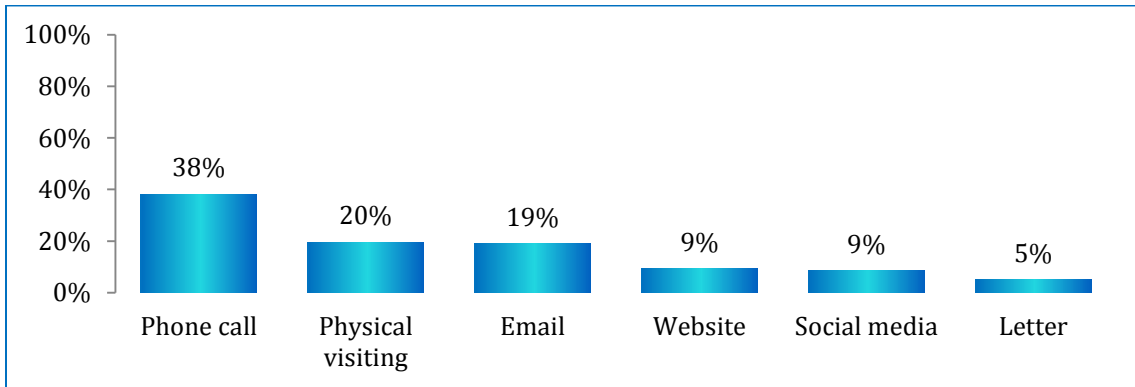
However, when asked through what sources they would like to receive information about the Commission, majority of those surveyed expressed a preference for the *radio* (80%). The second most preferred source of information on CCK is the television at 73% while newspapers (48%) and billboards (21%) came third and fourth respectively. Other preferred sources of information include; *magazines, internets, leaflets and word of mouth.*

Of the respondents who are aware of CCK, only 4.2% have directly contacted the Commissions' offices for services. The main mode of communication with CCK is through phone calls as indicated by 42% of those who have contacted the Commission. Other modes of communication are *email (27%) and physical visits (16%).*



Through what means did you contact the Communications Commission of Kenya? n = 72

Asked through what mode of communication they would prefer to use in contacting the Commission, a higher proportion of the respondents (38%) cited phone calls while 20% indicated physical visits. Other preferred modes of communicating with the CCK include: *email (17%), website and social media (11%), letters (7%).*



Through what means would you like to contact CCK? n = 415

The main reason for contacting CCK as indicated by 76% of those who have interacted with CCK is to raise queries and complaints about services offered by the licensees mainly the communication and broadcast service providers. Other reasons mentioned include; *obtain a license, make enquiries about digital migration, make visitations and to seek employment.*

Reason for contacting CCK	Incidence
General queries and complaints	76%
Make enquiries about digital migration	11%
To obtain license	9%
Visiting a staff member	6%
Seeking for employment	6%

If YES, what were your reasons for contacting the Communications Commission of Kenya (CCK)? n = 72

3.2.2 Knowledge and Satisfaction with CCK's roles

Survey results show that consumers who participated in the study rate their knowledge of the Commission's main role as Kenya's regulator for the information and communications sector at 6.5 out of an optimal 10 points. Group discussions held show that consumers believe that the Commission's role is mainly regulation of

Below are selected verbatim dialogues on perceived roles of the Commission recorded from the group discussions held with the consumers

'... I think CCK looks at the interest of the consumers like when they switched off unregistered phones...' **MAKUENI (ADVERTISER, male and 40 years)**

'... they license all providers of communication in the country like Safaricom, Airtel and all media stations. They also set up a fair playing ground for all of them so that no one appears to be smarter than the others...' **NAIROBI (MALE, CONSULTANT, 24 years)**

'... I think it regulates the information that the media is supposed to deliver to the public...' **NAIROBI (FEMALE, STUDENT, 21 years)**

"Facilitate the development of communication and information sector..." **MAKUENI, (FEMALE, TEACHER, 30 years)**

"I think CCK offers license to telecommunication." **MAKUENI, (MALE, STUDENT, 29)**

'... Looking after quality products and services within the communication industry...' **GARISSA (MALE, STUDENT, 19 years)**

Two key aspects of the Commission's roles that were assessed amongst the consumers are **enforcement of consumer rights** and **provision of communication services** through third party arrangements. In Kenya, the rights of consumers of goods and services are covered in various Acts. The Consumer laws aim to ensure that consumers have enough information about prices and quality of products and services to make suitable choices on what to buy. They also aim to ensure that goods are safe and are manufactured to an acceptable standard. This survey therefore sought to measure satisfaction of consumers with CCK's role in enforcing their rights as users of communication products and services.

Accordingly, respondents were asked to rate their satisfaction with the Commission with regard to enforcing these rights; this recorded an overall mean Satisfaction Index of 65.9 percentage points. Of the rights assessed, *'the right to truthful claims made about how items operate and where they were made must be true'* recorded the highest satisfaction score at 66.1% while *'the right to have access to basic communications services at reasonable prices'* recorded the lowest ratings at 62.7%. The table below shows satisfaction levels with the various consumer rights assessed in this survey round.

Statement	Year 2012	Year 2013
I. The right to truthful claims made about how items operate and where they were made must be true	64.3%	66.1%
II. The right to truthful claims about the time, place or manner in which a service is provided and claims about the effect of a service and the responsibilities of service providers must also be true.	63.6%	65.8%
III. The Right to Privacy	65.1%	67.6%
IV. The Right to be educated	64.3%	67.2%
V. The right to truthful claims about prices; actual prices, previous prices and recommended prices of goods and services must be stated truthfully. Where a price is stated, it should be clear what particular item it relates to. It should be the total price and there should be no hidden extra charges.	63.9%	66.8%
VI. The Right to be provided services that are safe and secure.	64.8%	66.5%
VII. The Right to fair treatment without undue discrimination from another consumer.	64.4%	66.3%
VIII. The Right to receive the level of quality of service that is quoted or stated by the service provider/operator in the service agreement.	64.5%	65.6%
IX. The Right to complain about quality, delay, quantity and tariff with regard to the nature of the communication service provided.	63.0%	65.5%

X.	The Right to receive a service with a quality that reflects the cost of the service (Value for money).	64.2%	65.4%
XI.	The Right to fair terms of service.	64.8%	65.4%
XII.	A consumer has a Right to an effective system for handling of complaints.	63.7%	65.1%
XIII.	The Right to have comparative information.	63.6%	64.3%
XIV.	The Right to full pre-contractual information that is clear (understandable), helpful, adequate and accurate on the services and choices offered by a service provider/operator to facilitate the making of an informed choice.	64.8%	63.8%
XV.	Consumers have a Right to have access to sector governing information.	62.4%	63.8%
XVI.	The Right to receive information assistance to assist in use of the services.	63.1%	63.1%
XVII.	The Right to have access to basic communications services at reasonable prices.	63.7%	62.7%
Mean Satisfaction Index		64.0%	65.9%

On a scale of 1 – 10 where 1 is very dissatisfied and 10 is very satisfied, how would you rate your satisfaction/dissatisfaction with the CCK in enforcing of your rights as consumer of telecommunications services and products?

The table below shows a comparative analysis of the level of satisfaction with consumer rights by region.

Statement	Nairobi	Coast	N. Eastern	Eastern	Central	R. Valley	Western	Nyanza	Aggregate
The Right to have access to basic communications services at reasonable prices.	65%	67%	61%	67%	61%	63%	62%	66%	64%
The Right to full pre-contractual information that is clear (understandable), helpful, adequate and accurate on the services and choices offered by a service provider/operator to facilitate the making of an informed choice.	64%	66%	61%	68%	61%	65%	64%	64%	64%
The Right to receive information assistance to assist in use of the services.	62%	70%	65%	69%	60%	65%	62%	66%	65%
Consumers have a Right to have access to sector governing information.	63%	67%	62%	71%	62%	65%	63%	66%	65%
The Right to have comparative information.	64%	69%	64%	72%	62%	65%	66%	69%	67%
The Right to receive a service with a quality that reflects the cost of the service (Value for money).	62%	67%	59%	68%	61%	63%	62%	66%	64%
The Right to receive the level of quality of service that is quoted or stated by the service provider/operator in the service agreement.	61%	69%	63%	68%	62%	65%	64%	65%	65%
The Right to fair treatment without undue discrimination from another consumer.	62%	71%	64%	70%	61%	66%	65%	68%	66%
The Right to fair terms of service.	63%	73%	61%	70%	62%	66%	64%	67%	66%
The Right to complain about quality, delay, quantity and tariff with regard to the nature of the communication service provided.	62%	68%	63%	70%	61%	66%	66%	65%	65%

A consumer has a Right to an effective system for handling of complaints.	62%	67%	62%	70%	61%	65%	65%	66%	65%
The Right to be provided services that are safe and secure.	65%	70%	61%	71%	61%	66%	69%	68%	67%
The Right to Privacy.	64%	69%	58%	72%	61%	67%	66%	69%	66%
The Right to be educated	65%	70%	59%	70%	62%	66%	65%	66%	66%
The right to truthful claims made about how items operate and where they were made must be true	64%	68%	62%	71%	62%	66%	66%	67%	66%
The right to truthful claims about the time, place or manner in which a service is provided and claims about the effect of a service and the responsibilities of service providers must also be true.	63%	66%	60%	71%	62%	64%	64%	66%	65%
The right to truthful claims about prices; actual prices, previous prices and recommended prices of goods and services must be stated truthfully. Where a price is stated, it should be clear what particular item it relates to. It should be the total price and there should be no hidden extra charges.	64%	64%	59%	71%	62%	64%	65%	66%	65%
Mean Satisfaction Index	63%	68%	61%	70%	61%	65%	64%	66%	65%

On a scale of 1 – 10 where 1 is very dissatisfied and 10 is very satisfied, how would you rate your satisfaction/dissatisfaction with the CCK in enforcing of your rights as consumer of telecommunications services and products?

Further, the Commission is responsible for developing and co-ordinating the policies and strategies with respect to development and operation of telecommunications services in Kenya. Thus the Commission licences telecommunications operators and service providers, and monitors their performance on a continuous basis to ensure that they discharge the obligations as stipulated in their licences, and in keeping with the provisions of the Kenya Information and Communications Act, CAP 411A and related Regulations. In this regard, the survey also sought to measure the level of satisfaction with the services provided by the communication service providers licensed by the Commission.

3.2.3 Satisfaction with Communication Service Providers

The communications industry is recognized the world over as a prerequisite for a country's growth. It must be capable of offering efficient and affordable information and communication services to the service recipients. In Kenya, the following information and communication services are important in ensuring a properly functioning communications industry; *mobile phone services, landline/fixed telephone services, data/internet services, television services, radio*

services, postal and courier services. The survey sought to measure the levels of satisfaction amongst the consumers with regard to the aforementioned services on a 9 indicator level: availability, accessibility, pricing, complaint handling, variety of products and services, provision of information, reliability, customer care services and advertisements.

I. Mobile Phone Services

Overall, consumers surveyed rated their satisfaction with mobile phone services at 68.5%. The highest rated service area with regard to mobile phone services is service availability and advertisements both at 71.5% and 70.4% respectively while the lowest rated was pricing at 62.6% and complaint handling at 65.3%. Below are dialogue verbatim drawn from the focus group discussions held.

Accessibility

"... In terms of accessibility everywhere I go... has network NYERI, MALE, DRIVER, 39"

Complaints handling

"...to me is very effective all I have to do is call 100 and in as much as they take long to pick up, they do sort out your issues..." NAIROBI, FEMALE, STUDENT, 23 yrs

Pricing

"... is very fair in terms of the local calls but international is expensive..." NAIROBI, FEMALE, STUDENT, 23.

Service quality

'... their services are not very standard sometimes their network is congested and difficult to communicate in...' NAIROBI, MALE, TEACHER, 29

Provision of information

'... is very good at relaying information to their customers for example if there are changes in tariffs. NAIROBI, MALE, TEACHER, 29.'

Advertisement

'... Safaricom advertisement is very good because when you watch it you feel you are part and parcel of it...' NYERI, MALE, YOUTH LEADER, 30

The table below shows the satisfaction scores recorded for mobile phone services by indicator for the years 2011/2012 and 2012/2013.

Indicators for mobile phone services	Year 2012	Year 2013
Availability	59%	71.5%
Advertisements	60%	70.4%
Accessibility	60%	70.3%
Provision of information	59%	70.1%
Variety of products and services	59%	69.7%
Reliability	60%	68.9%

Customer care services	59%	67.7%
Complaint handling	58%	65.3%
Pricing	58%	62.6%
Overall Index	59%	68.5%

In general, on a scale of 1 to 10 where 1 is very dissatisfied and 10 very satisfied, what rating on satisfaction would you give to each of the following aspects on the communication services you use? N=1525

The table below shows a comparative analysis of the level of satisfaction with various indicators of mobile phone services by region.

Indicators for mobile phone services	Nairobi	Coast	N. Eastern	Eastern	Central	R. Valley	Western	Nyanza	Aggregate
Accessibility	70%	72%	60%	76%	76%	66%	62%	75%	70%
Availability	71%	72%	64%	77%	73%	70%	65%	76%	72%
Pricing	62%	62%	58%	71%	60%	62%	62%	59%	63%
Complaint handling	63%	61%	61%	72%	70%	65%	59%	65%	65%
Variety of products and services	66%	70%	64%	75%	74%	68%	63%	73%	70%
Provision of information	67%	73%	66%	76%	75%	67%	64%	71%	70%
Reliability	68%	70%	60%	76%	75%	65%	63%	72%	69%
Customer care services	66%	68%	59%	74%	75%	64%	65%	68%	68%
Advertisements	66%	73%	62%	76%	75%	68%	68%	71%	70%
Overall Index	67%	69%	62%	75%	73%	66%	63%	70%	69%

In general, on a scale of 1 to 10 where 1 is very dissatisfied and 10 very satisfied, what rating on satisfaction would you give to each of the following aspects on the communication services you use? N=1525

II. Landline or Fixed Telephone Services

Overall, consumers surveyed rated their satisfaction with fixed telephone services at 65.5%. A comparative analysis of level of satisfaction with various indicators of landline or telephone services for the years 2011/2012 and 2012/2013 is shown in the table below.

Indicators for telephone / fixed telephone services	Year 2012	Year 2013
Availability	66%	67.6%
Advertisements	67%	67.4%
Provision of information	66%	66.5%
Variety of products and services	66%	65.9%
Accessibility	66%	65.8%
Reliability	66%	65.4%
Customer care services	65%	65.0%
Complaint handling	63%	63.4%
Pricing	63%	62.2%

Overall Index	65%	65.5%
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In general, on a scale of 1 to 10 where 1 is very dissatisfied and 10 very satisfied, what rating on satisfaction would you give to each of the following aspects on the landline/fixed telephone services you use? n =792

The table below shows a comparative analysis of the level of satisfaction with various indicators of landline or fixed telephone services by region.

Indicators for telephone / fixed telephone services	Nairobi	Coast	N. Eastern	Eastern	Central	R. Valley	Western	Nyanza	Aggregate
Accessibility	62%	66%	62%	75%	76%	62%	63%	63%	66%
Availability	64%	69%	64%	73%	79%	65%	66%	62%	68%
Pricing	64%	57%	59%	71%	74%	61%	57%	49%	62%
Complaint handling	60%	61%	61%	71%	77%	64%	48%	54%	63%
Variety of products and services	65%	65%	62%	71%	78%	65%	63%	58%	66%
Provision of information	65%	71%	64%	72%	80%	64%	62%	59%	66%
Reliability	67%	68%	62%	72%	78%	63%	60%	56%	65%
Customer care services	67%	66%	60%	71%	79%	63%	59%	56%	65%
Advertisements	66%	71%	60%	73%	80%	67%	68%	57%	67%
Overall Index	65%	66%	62%	72%	78%	64%	61%	57%	66%

In general, on a scale of 1 to 10 where 1 is very dissatisfied and 10 very satisfied, what rating on satisfaction would you give to each of the following aspects on the landline/fixed telephone services you use? n =792

III. Data and Internet Services

Overall, the consumers rated their satisfaction with data/ internet services at 67.7% with *pricing and complaints handling* as the lowest rated services both at 65.7%.

A comparative analysis of level of satisfaction with various indicators of data and internet services for the years 2011/2012 and 2012/2013 is shown in the table below.

Indicators for data and internet Services	Year 2012	Year 2013
Availability	66%	69.7%
Provision of information	66%	69.3%
Advertisements	67%	68.9%
Reliability	66%	68.2%
Accessibility	66%	68.0%
Variety of products and services	66%	67.7%
Customer care services	65%	66.3%
Pricing	63%	65.8%
Complaint handling	63%	65.7%

Overall Index	65%	67.7%
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In general, on a scale of 1 to 10 where 1 is very dissatisfied and 10 very satisfied, what rating on satisfaction would you give to each of the following aspects on the data/internet services you use? n =1154

The table below shows a comparative analysis of the level of satisfaction with various indicators of data and internet services by region.

Indicators for data and internet Services	Nairobi	Coast	N. Eastern	Eastern	Central	R. Valley	Western	Nyanza	Aggregate
Accessibility	66%	72%	62%	72%	80%	62%	56%	69%	68%
Availability	69%	73%	61%	72%	80%	65%	65%	72%	70%
Pricing	65%	64%	58%	69%	76%	64%	57%	67%	66%
Complaint handling	65%	63%	61%	69%	76%	63%	60%	65%	66%
Variety of products and services	67%	73%	61%	69%	78%	63%	58%	69%	68%
Provision of information	68%	72%	62%	73%	80%	63%	67%	71%	69%
Reliability	69%	72%	62%	71%	79%	62%	60%	70%	68%
Customer care services	69%	67%	61%	69%	79%	60%	65%	67%	66%
Advertisements	71%	73%	58%	71%	80%	63%	70%	70%	69%
Overall Index	68%	70%	61%	71%	79%	63%	62%	69%	68%

In general, on a scale of 1 to 10 where 1 is very dissatisfied and 10 very satisfied, what rating on satisfaction would you give to each of the following aspects on the data/internet services you use? n =1154

IV. Television Services

Overall, consumers surveyed rated their satisfaction with television services at 72.6% which was a 3.6% points increase from the year 2012 (69.0%) with *advertisements and availability* as the highest rated services at 74.4% and 74.3% respectively

A comparative analysis of level of satisfaction with various indicators of television services for the years 2011/2012 and 2012/2013 is shown in the table below.

Indicators for television services	Year 2012	Year 2013
Advertisements	71%	74.4%
Availability	71%	74.3%
Provision of information	71%	74.0%
Reliability	71%	73.5%
Variety of products and services	70%	73.2%
Accessibility	70%	72.9%
Customer care services	69%	70.9%
Pricing	66%	70.6%
Complaint handling	67%	69.9%

Overall Index	69%	72.6%
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In general, on a scale of 1 to 10 where 1 is very dissatisfied and 10 very satisfied, what rating on satisfaction would you give to each of the following aspects on the television services you use? n =1315

The table below shows a comparative analysis of the level of satisfaction with various indicators of television services by region.

Indicators for television services	Nairobi	Coast	N. Eastern	Eastern	Central	R. Valley	Western	Nyanza	Aggregate
Accessibility	71%	72%	63%	78%	81%	69%	64%	80%	73%
Availability	71%	72%	63%	78%	80%	72%	67%	82%	74%
Pricing	69%	67%	62%	74%	78%	71%	63%	72%	71%
Complaint handling	68%	66%	63%	73%	79%	69%	59%	74%	70%
Variety of products and services	69%	73%	65%	77%	81%	71%	64%	77%	73%
Provision of information	70%	72%	65%	78%	83%	72%	67%	78%	74%
Reliability	70%	70%	65%	78%	82%	69%	68%	80%	73%
Customer care services	70%	71%	64%	72%	81%	67%	67%	75%	71%
Advertisements	71%	75%	66%	78%	83%	72%	66%	78%	74%
Overall Index	70%	71%	64%	76%	81%	70%	65%	77%	73%

In general, on a scale of 1 to 10 where 1 is very dissatisfied and 10 very satisfied, what rating on satisfaction would you give to each of the following aspects on the television services you use? n =1315

V. Radio Services

Overall, the consumers rated their satisfaction with radio services at 76.1% with *availability and advertisements* as the highest rated services both at 78.2% and 77.2% respectively. On the other hand, customer care was the lowest rated at 73.9% in the year 2012/2013. Below are selected excerpts of verbatim dialogue drawn from the group discussions held.

Accessibility and Availability

'... radio stations and most TV channels are not easily accessible here... GARISSA, MALE, STUDENT, 24'

Complaints handling

'...in radio when you take the complaint they look at it but on TV they don't look at it... 'NAIROBI, MALE, BARBER

Reliability

‘... I watch KTN most of the time and I think it is reliable on the news I get from there.

.. ‘ NAIROBI, MALE, REGISTRER OFFICER, 28

A comparative analysis of level of satisfaction with various indicators of radio services for the years 2011/2012 and 2012/2013 is shown in the table below.

Indicators for radio services	Year 2012	Year 2013
Availability	72%	78.2%
Advertisements	72%	77.2%
Provision of information	72%	76.9%
Accessibility	72%	76.7%
Reliability	71%	76.1%
Variety of products and services	71%	76.0%
Pricing	69%	75.9%
Complaint handling	69%	73.9%
Customer care services	70%	73.9%
Overall Index	71%	76.1%

In general, on a scale of 1 to 10 where 1 is very dissatisfied and 10 very satisfied, what rating on satisfaction would you give to each of the following aspects on the radio services you use? n =1359

The table below shows a comparative analysis of the level of satisfaction with various indicators of radio services by region.

Indicators for radio services	Nairobi	Coast	N. Eastern	Eastern	Central	R. Valley	Western	Nyanza	Aggregate
Accessibility	74%	75%	64%	82%	84%	76%	63%	85%	77%
Availability	74%	76%	66%	83%	84%	78%	68%	85%	78%
Pricing	74%	73%	64%	78%	82%	78%	65%	79%	76%
Complaint handling	72%	70%	63%	77%	83%	74%	65%	77%	74%
Variety of products and services	75%	75%	63%	81%	83%	75%	67%	80%	76%
Provision of information	77%	76%	65%	81%	85%	75%	67%	82%	77%
Reliability	78%	74%	65%	80%	84%	75%	66%	81%	76%
Customer care services	74%	72%	62%	75%	85%	73%	66%	78%	74%
Advertisements	78%	77%	65%	81%	85%	77%	69%	79%	77%
Overall Index	75%	74%	64%	80%	84%	76%	66%	81%	76%

In general, on a scale of 1 to 10 where 1 is very dissatisfied and 10 very satisfied, what rating on satisfaction would you give to each of the following aspects on the radio services you use? n =1359

VI. Postal Services

Overall, the consumers rated their satisfaction with postal services at 62.1% with *customer care and accessibility* as the lowest rated services both at 61.7% and 61.0% respectively.

A comparative analysis of level of satisfaction with various indicators of postal services for the years 2011/2012 and 2012/2013 is shown in the table below.

Indicators for postal services	Year 2012	Year 2013
Availability	61%	63.1%
Pricing	59%	62.3%
Complaint handling	59%	62.2%
Variety of products and services	60%	62.2%
Reliability	60%	62.2%
Provision of information	60%	62.0%
Advertisements	60%	61.9%
Customer care services	60%	61.7%
Accessibility	61%	61.0%
Overall Index	60%	62.1%

In general, on a scale of 1 to 10 where 1 is very dissatisfied and 10 very satisfied, what rating on satisfaction would you give to each of the following aspects on the postal services you use? n =800

The table below shows a comparative analysis of the level of satisfaction with various indicators of postal services by region.

Indicators for postal services	Nairobi	Coast	N. Eastern	Eastern	Central	R. Valley	Western	Nyanza	Aggregate
Accessibility	62%	62%	53%	69%	76%	57%	55%	54%	61%
Availability	61%	63%	58%	69%	76%	61%	64%	53%	63%
Pricing	61%	60%	61%	69%	72%	62%	61%	51%	62%
Complaint handling	66%	61%	61%	67%	73%	60%	60%	52%	62%
Variety of products and services	63%	65%	59%	69%	73%	60%	63%	51%	62%
Provision of information	64%	64%	58%	69%	73%	59%	64%	53%	62%
Reliability	61%	64%	53%	69%	73%	60%	68%	55%	62%
Customer care services	64%	63%	51%	69%	74%	60%	62%	52%	62%
Advertisements	63%	61%	53%	69%	72%	61%	63%	53%	62%
Overall Index	63%	63%	56%	69%	73%	60%	62%	53%	62%

In general, on a scale of 1 to 10 where 1 is very dissatisfied and 10 very satisfied, what rating on satisfaction would you give to each of the following aspects on the postal services you use? n =800

VII. Courier Services

Overall, consumers rated their satisfaction with courier services at 62.2% with *accessibility and pricing* as the lowest rated services at 61.4% and 60.7% respectively while the highest rated were availability (63.8%) and reliability (63.4%) in the year 2012/2013. Below are selected excerpts of verbatim dialogue drawn from the group discussions held.

Pricing and Reliability

'... using a courier is fast so they are reliable but pricing differs because KShs. 300 maybe cheaper to someone but to me it is average...' NAIROBI, MALE, LAWYER, 29

Reliability

'... maybe I don't have one to compare with because there are no any others like EMS and the rest. It is reliable since it can be able to reach convenient places like Maralal and Baragoi which is a distance of 100 km in opposite direction...' NAIROBI, MALE, KENYA PERSONS NETWORK, 42.

A comparative analysis of level of satisfaction with various indicators of courier services for the years 2011/2012 and 2012/2013 is shown in the table below.

Indicators for courier services	Year 2012	Year 2013
Availability	62%	63.8%
Reliability	62%	63.4%
Provision of information	61%	62.9%
Complaint handling	59%	62.5%
Customer care services	61%	62.1%
Variety of products and services	61%	61.9%
Advertisements	62%	61.5%
Accessibility	61%	61.4%
Pricing	59%	60.7%
Overall Index	61%	62.2%

In general, on a scale of 1 to 10 where 1 is very dissatisfied and 10 very satisfied, what rating on satisfaction would you give to each of the following aspects on the courier services you use? n = 800

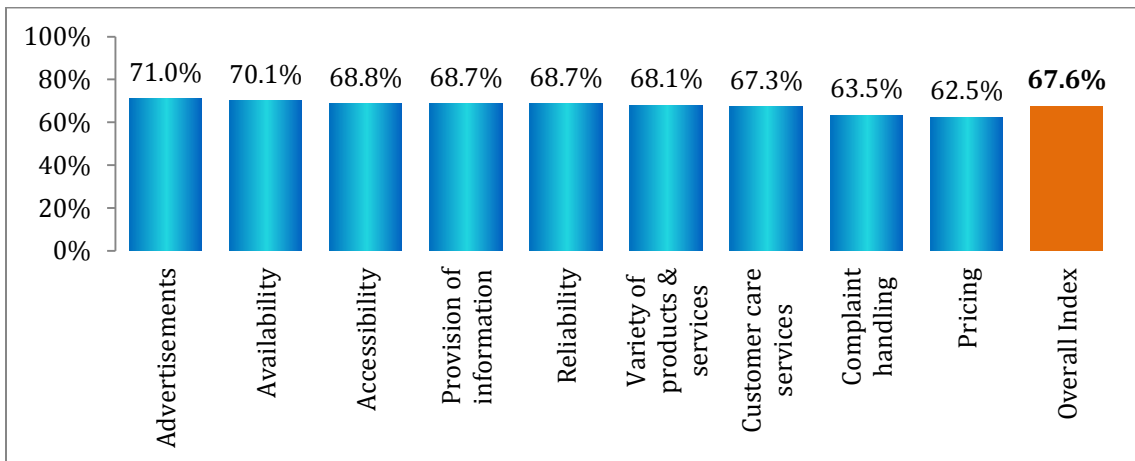
The table below shows a comparative analysis of the level of satisfaction with various indicators of courier services by region.

Indicators for courier services	Nairobi	Coast	N. Eastern	Eastern	Central	R. Valley	Western	Nyanza	Aggregate
Accessibility	63%	64%	54%	66%	77%	57%	45%	62%	61%
Availability	67%	66%	57%	66%	76%	61%	59%	61%	64%
Pricing	63%	63%	58%	64%	69%	60%	56%	55%	61%
Complaint handling	64%	66%	60%	65%	71%	61%	61%	58%	62%
Variety of products and services	65%	64%	56%	65%	77%	60%	55%	57%	62%
Provision of information	69%	61%	56%	67%	77%	60%	60%	60%	63%
Reliability	67%	64%	54%	66%	76%	61%	59%	64%	63%
Customer care services	68%	63%	52%	66%	75%	60%	59%	58%	62%
Advertisements	69%	61%	48%	67%	73%	61%	60%	55%	61%
Overall Index	66%	64%	55%	66%	74%	60%	57%	59%	62%

In general, on a scale of 1 to 10 where 1 is very dissatisfied and 10 very satisfied, what rating on satisfaction would you give to each of the following aspects on the courier services you use? n =800

VIII. Overall Satisfaction with Communication Services Providers

Overall, consumers rated their satisfaction with information and communication services at 67.6 points out of the optimal 100 points. As compared to other information and communication indicators assessed, *pricing (62.5%), complaints handling (63.5%) and customer care services (67.3)* were the lowest rated in terms of satisfaction. On the other hand, *advertisements (71.0%), availability (70.1%) and accessibility (68.8%)* recorded the highest satisfaction scores.



Overall, on a scale of 1 – 10 where 1 is very dissatisfied and 10 is very satisfied, how would you rate your satisfaction with **Communication services** you use? n =1466

The table below shows a comparative analysis of the level of satisfaction with various indicators of communication services by region.

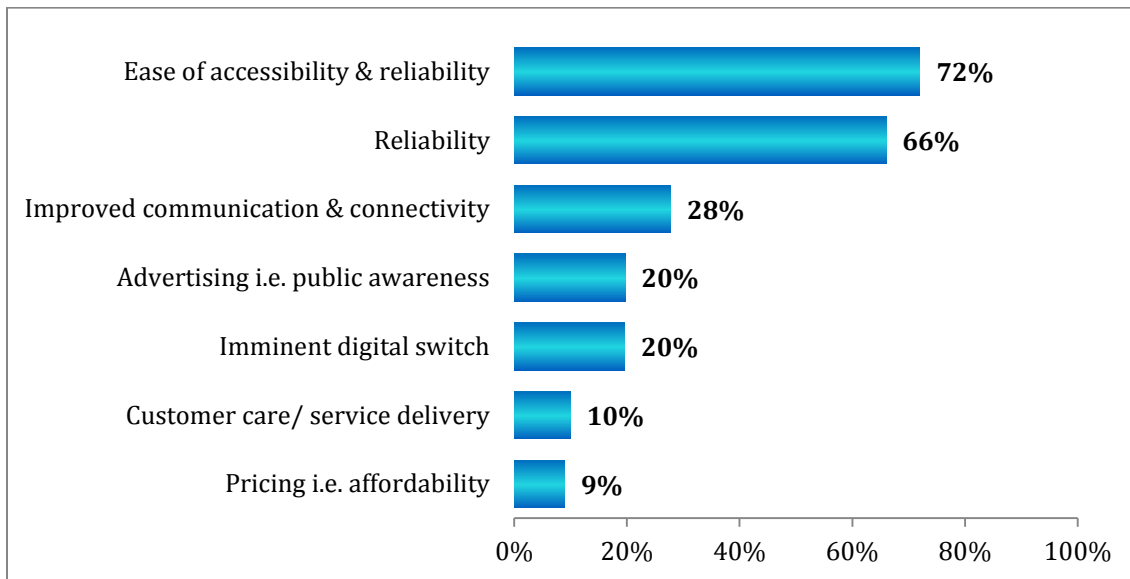
Indicators for communication services	Nairobi	Coast	N. Eastern	Eastern	Central	R. Valley	Western	Nyanza	Aggregate
Accessibility	66%	70%	59%	74%	75%	68%	61%	70%	69%
Availability	67%	68%	62%	75%	75%	72%	64%	69%	70%
Pricing	58%	62%	62%	71%	61%	63%	58%	58%	63%
Complaint handling	57%	61%	63%	71%	68%	63%	58%	62%	63%
Variety of products and services	63%	70%	62%	74%	73%	67%	63%	68%	68%
Provision of information	64%	72%	63%	75%	72%	68%	63%	69%	69%
Reliability	65%	68%	62%	76%	74%	67%	65%	66%	69%
Customer care services	67%	68%	61%	72%	74%	65%	64%	66%	67%
Advertisements	68%	73%	63%	77%	76%	71%	68%	66%	71%
Overall Index	64%	68%	62%	74%	72%	67%	63%	66%	68%

Overall, on a scale of 1 – 10 where 1 is very dissatisfied and 10 is very satisfied, how would you rate your satisfaction with **Communication services** you use? n =1466

3.2.4 Satisfaction with Communication Services

Asked which key areas they are satisfied with in regard to communication services, *ease of accessibility* (72%) and *reliability* (66%) were cited by majority of the consumers surveyed while approximately three in ten of the survey respondents cited *improved communication connectivity*. Other key satisfaction areas mentioned include: *advertising* (20%), *impending*

digital migration (20%), customer care service (10%) and pricing (9%). This is depicted in the chart below.



With regard to communication services, what THREE key areas would you say you are very satisfied in?

On the other hand, respondents recorded various areas of dissatisfaction with communication services. More than four in ten respondents cited *poor price regulation* of various communication services as a key area of dissatisfaction. Other areas mentioned include: *poor management of postal and courier services (27%)* and *complaint handling and conflict resolution techniques (26%)*. The table below shows other key areas of dissatisfaction with communication services as cited by the survey respondents.

Areas they are dissatisfied with [n= 1287]	Incidence
Poor in regulation of pricing	43%
Postal and courier management	27%
Complaint handling and conflict resolution	26%
Accessibility of information	23%
Poor signal and network problems	22%
Customer care services	22%
Poor advertising and marketing	13%
Poor service delivery	6%
Poor regulation of communication gadgets i.e. switching off of phones	5%
Complicated and long licensing procedures	8%
Low accessibility i.e. countrywide presence	3%
Public education	3%
Consumer protection/ cyber crimes	2%

With regards to communication services, what THREE key areas would you say you are very dissatisfied in?

Asked what key areas of service provision they would concentrate on to help ensure that customers are very satisfied, a number of key issues were raised as shown in the table below.

Key recommendations	Incidence
Ensuring affordable prices and rates for communication services and products especially digital decoders	47%
Improve customer care	38%
Ensure ease of accessibility to their services countrywide	35%
Ensure availability of the right information for all Kenyans	26%
Consumer protection and education	16%
Improvement of signal and network quality	15%
Increase awareness on its mandate and roles/ advertisement	14%
Effective service delivery	10%
Embrace modern technology	6%
Ensure level and fair playground for all	5%
Uphold transparency and fairness	4%
Ensure all stakeholder involvement in decision making	4%
Empowering and motivating the staff	3%
Better plan for digital migration but not switching off	3%
Encourage positive competition	2%
Diversity in institutions e.g. schools and hospitals	1%

Assuming that you are in charge of communication service in Kenya, which THREE key areas of service provision would you concentrate on to help ensure that your customers are very satisfied? n=1440

3.2.5 Overall Satisfaction with Communications Commission of Kenya (CCK) by the Consumers for the year 2012/2013

Overall, the Communications Commission of Kenya recorded a mean satisfaction index of 67.6 points out of the optimal 100 points. Thus a little improvement of 0.9 points was registered in the year 2012/2013 as compared to 2011/2012.

Assessment Area	Year 2012		Year 2013	
	Unweighted Customer Satisfaction Index	Weighted Customer Satisfaction Index	Unweighted Customer Satisfaction Index	Weighted Customer Satisfaction Index
Radio communication services	70.8%	72.9%	73.7%	76.1%
Television communication services	69.4%	71.5%	70.4%	72.7%
Overall communication services	66.2%	68.3%	65.6%	67.7%
Mobile phone communication services	65.9%	68.0%	66.4%	68.5%
Data / internet communication services	65.1%	67.2%	65.6%	67.7%
Consumer rights	64.0%	66.1%	63.9%	65.9%
Courier communication services	60.8%	62.9%	60.3%	62.2%
Postal communication services	60.2%	62.3%	60.2%	62.1%
Fixed telephone communication services	59.2%	61.3%	63.4%	65.4%
Overall Mean Customer Satisfaction Index (CSI)	64.6%	66.7%	65.5%	67.6%

3.3 The Suppliers

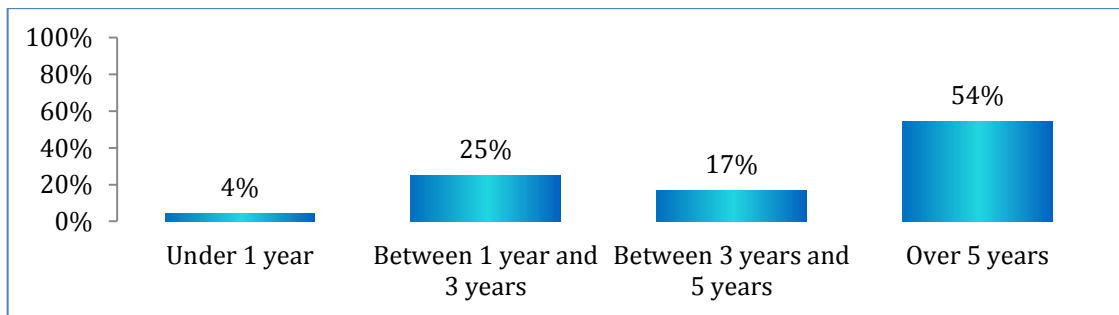
The Communications Commission of Kenya has suppliers who provide them with goods and services. Unlike consumers, this category interacts directly with the Commission. However, they do not directly benefit from the results of the Commission’s regulatory interventions but mainly through the contractual engagements they have with the Commission.

Amongst this category of the Commission’s customers, the survey sought to measure the suppliers’ satisfaction with CCK mainly on two fronts: *the level of satisfaction with the Commission’s customer care function and the level of satisfaction with the Commission’s procurement, contracting and payment of goods and services.*

In this regard, the key areas assessed include: *length of relationship between institutions and the Commission, the Commission’s employees, information and communication, the Commission’s environment, procurement services, contracting services, goods acceptance and payment services and overall service provision.*

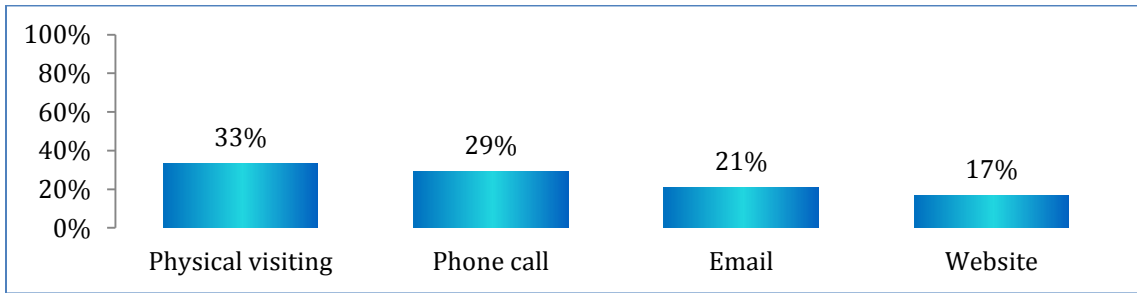
3.3.1 Relationship with Communications Commission of Kenya (CCK)

Survey results show that a majority (54%) of the suppliers interviewed has been dealing with the Commission for over 5 years while 42% have been dealing with the Commission for a period ranging from one to five years. Only 4% indicated that they have had a relationship with the Commission for less than 1 year.



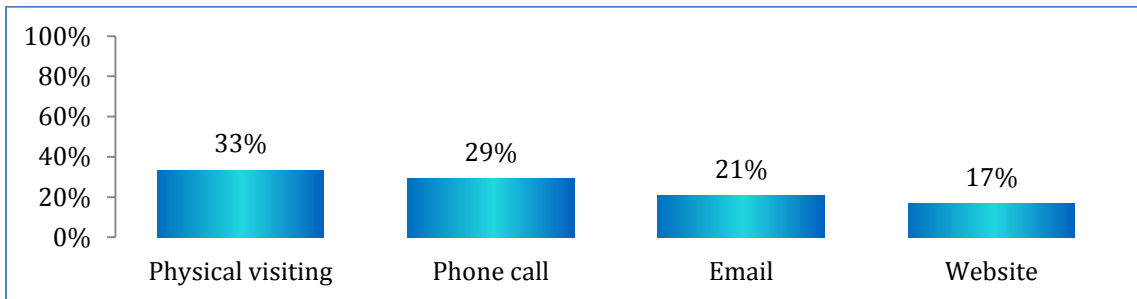
How long have you had a relationship with the Communications Commission of Kenya (CCK)? N=42

One in every four of the suppliers interviewed indicated that they interact with the Commission more than twice a month, while 21% interact with CCK on a monthly basis. The interaction with CCK is mainly through *physical visit* and *phone calls* at 33% and 29% respectively while 21% indicated that they communicate with CCK through emails. (See the chart below).



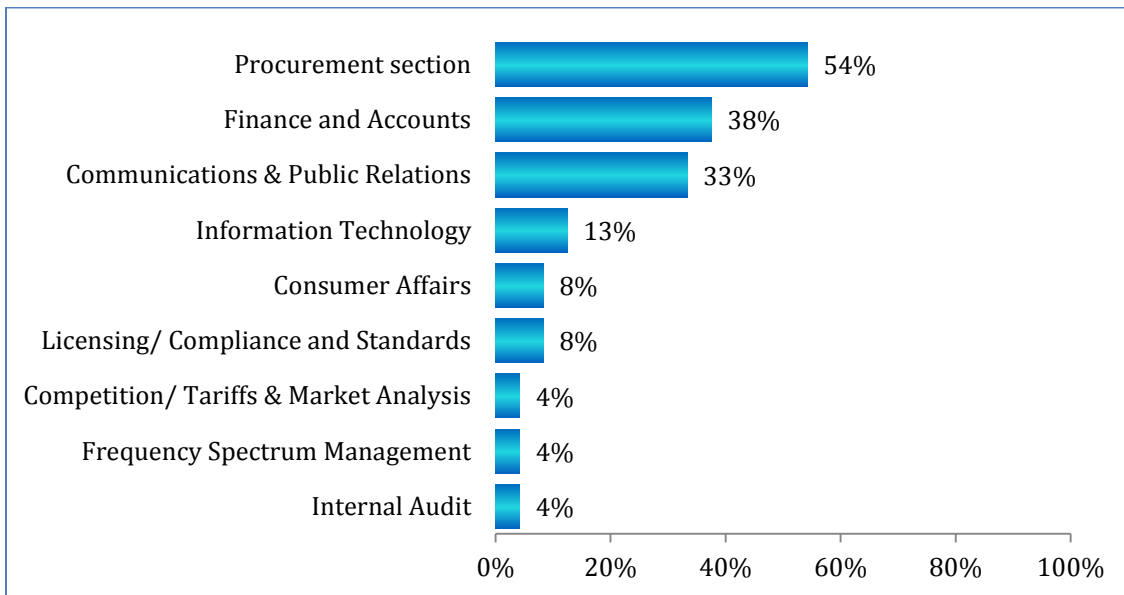
How often do you interact with the Communications Commission of Kenya? N=42

Asked what mode of communication they would prefer with regard to interacting with the Commission, approximately one third of the suppliers interviewed still preferred to communicate with the Commission through *physical visits*. *Phone calls and emails* are preferred by 29% and 21% respectively.



Though what means would you prefer to communicate/interact with CCK? N = 42

For any supply to be made in an institution, procurement and accounts have to be involved with regards to procurement, accounting procedures and payments and thus among the many departments at the Commission, suppliers mainly interact with *Procurement department, Finance and Accounts department and Communications and Public Relations department* at 54%, 38% and 33% respectively.



Which Department/office within CCK do you interact with? N = 42

3.3.2 Satisfaction with environment at the Communications Commission of Kenya

Overall, CCK recorded a mean satisfaction score of 85.1% on environment by the surveyed suppliers for year 2012/2013 compared to 77.9% in year 2011/2012 thus a 7.2% improvement. As was the case with the 2011/2012 survey results, security recorded the highest satisfaction rating amongst suppliers with regard to the Commission's environment. On the other hand, staff diversity (82%) scored the lowest as compared to other areas of measurement.

Aspect of Environment	Year 2012	Year 2013
Security of CCK offices	79.0%	86.7%
Overall environment	78.8%	86.7%
Adoption and use of technology	78.1%	87.2%
Accessibility of CCK offices	77.7%	84.1%
Interior design and ambience	77.7%	85.6%
Cleanliness / tidiness	76.9%	84.1%
Labelling of offices	76.9%	84.6%
Staff diversity e.g. gender, ability	75.8%	82.0%
Mean Index	77.9%	85.1%

On a scale of 1 – 10 where 1 is very dissatisfied and 10 is very satisfied, how would you rate your level of satisfaction/dissatisfaction with the following aspects of environment at CCK?

3.3.3 Satisfaction with Service Provision at Communications Commission of Kenya

Overall, suppliers surveyed rated their satisfaction with service provision at CCK at 73.6% with *procedures put in place to ensure efficiency in service delivery* recording the highest satisfaction score of 73.8% .

On the flip side, as compared to other areas assessed, *involvement of stakeholders in planning and implementation of activities* recorded the lowest satisfaction score amongst surveyed suppliers.

Aspect of service provision	Year 2012	Year 2013
Procedures put in place to ensure efficiency in service delivery	69.9%	73.8%
Promptness in responding to clients' needs/queries	69.5%	73.2%
Flexibility in service delivery	69.3%	73.1%
Efficiency in handling of complaints	69.8%	73.0%
<i>Involvement of stakeholders in planning and implementation of activities</i>	<i>67.7%</i>	<i>70.1%</i>
Overall service delivery	71.8%	76.9%
Mean Index	69.6%	73.6%

On a scale of 1 – 10 where 1 is very dissatisfied and 10 is very satisfied, how would you rate your level of satisfaction with the following aspects of service provision at CCK?

3.3.4 Satisfaction with CCK Staff

The suppliers surveyed gave an overall satisfaction rating of 76.6% with regard to the Commission's staff. The key area that recorded the highest satisfaction amongst those assessed is *staff's knowledge of CCK's products* while *ease of accessibility of staff* and *ability of staff to solve problems and give valuable advice* were rated the lowest at 76.3% and 75.3% respectively.

CCK Employees - Professionalism	Year 2012	Year 2013
CCK staff have good knowledge of their products and services	74.3%	77.9%
CCK staff have the necessary technical skills to ensure efficiency in service delivery	72.9%	78.4%
CCK staff are easily accessible	71.8%	76.3%
<i>CCK staff are able to solve problems and give valuable advice</i>	<i>71.3%</i>	<i>75.3%</i>
<i>CCK staff offer prompt services</i>	<i>72.1%</i>	<i>75.8%</i>
<i>CCK staff are flexible in accommodating various client needs/queries</i>	<i>71.8%</i>	<i>75.8%</i>
Mean Index	72.4%	76.6%

On a scale of 1 – 10 where 1 is very dissatisfied and 10 is very satisfied, how would you rate your level of satisfaction with the following aspects of service provision at CCK?

3.3.5 Satisfaction with Information and Communication at CCK

Overall, satisfaction with information and communication at CCK was rated at 68.7% by the surveyed suppliers. This is the area that recorded a lower satisfaction score as compared to others assessed. Specifically, suppliers surveyed are mostly satisfied with *clarity of CCK's information and communication at 69.6%* while *timeliness of information and feedback to its stakeholders (suppliers) together with consistency and dependability of information given by CCK* recorded lower satisfaction scores of 66.5% and 69.1% respectively.

Aspect of Information and Communication	Year 2012	Year 2013
The information provided by CCK to its stakeholders is clear and easy to understand	70.3%	69.6%
There is efficient flow of information between CCK and stakeholders	69.2%	69.6%
The information provided by CCK to its stakeholders is consistent and dependable	69.9%	69.1%
<i>CCK provides timely information and feedback to its stakeholders</i>	<i>68.0%</i>	<i>66.5%</i>
Mean Index	69.3%	68.7%

On a scale of 1 – 10 where 1 is very dissatisfied and 10 is very satisfied, how would you rate your level of satisfaction with the following aspects of service provision at CCK?

3.3.6 Satisfaction with CCK's Procurement Services

Overall satisfaction with procurement services at CCK is 78.4% as rated by the surveyed suppliers. The suppliers surveyed are mostly satisfied with the non-conflicting feedback on tender results and clarity of their adverts and unambiguity of the Commission's tenders which attracted satisfaction scores of 80.7% and 79.9% respectively.

Aspect of Procurement Services	Year 2012	Year 2013
CCK does not provide conflicting feedback on tender results	68.0%	80.7%
CCK advertises clear and unambiguous tenders	68.0%	79.9%
Overall, the procurement processes at CCK are efficient	65.4%	79.9%
CCK undertakes its procurement processes in a transparent and accountable manner	66.9%	79.4%
CCK abides by the set conditions of each tender/request for proposals	65.1%	78.7%
<i>CCK provides prompt feedback on complaints raised with regards to tender processes</i>	<i>65.4%</i>	<i>75.5%</i>
<i>CCK provides prompt feedback on the results of its tender processes</i>	<i>67.7%</i>	<i>74.8%</i>
Mean Index	66.7%	78.4%

On a scale of 1 – 10 where 1 is very dissatisfied and 10 is very satisfied, how would you rate your level of satisfaction with the following aspects of procurement services at CCK?

On the other hand, prompt feedback on the results of its tender processes and prompt feedback on complaints raised with regards to tender processes recorded the lowest satisfaction scores as compared to other measurement areas under procurement services. (See the table above).

3.3.7 Satisfaction with CCK's Contracting Services

Overall, satisfaction with contracting services at CCK was rated at 77.4% by the surveyed suppliers. The suppliers surveyed highly rated *accuracy of contracts by CCK* at 78.6% while the lowest rated was *CCK's fairness and promptness and efficiency in processing contract extensions* at 75.6%.

Aspect of Contracting Services	Year 2012	Year 2013
CCK draws contracts and executes them expeditiously	69.2%	77.6%
CCK draws accurate contracts	66.6%	78.6%
CCK contract terms are generally clear and fair	67.7%	77.2%
<i>CCK is fair and expeditious in processing contract extensions</i>	<i>66.9%</i>	<i>75.6%</i>
CCK always honours contract terms	66.9%	78.1%
Overall, the contracting processes at CCK are efficient	69.5%	77.6%
Mean Index	67.8%	77.4%

On a scale of 1 – 10 where 1 is very dissatisfied and 10 is very satisfied, how would your level of satisfaction with the following aspects of contracting services at CCK?

3.3.8 Satisfaction with Goods Acceptance and Payment Services at CCK

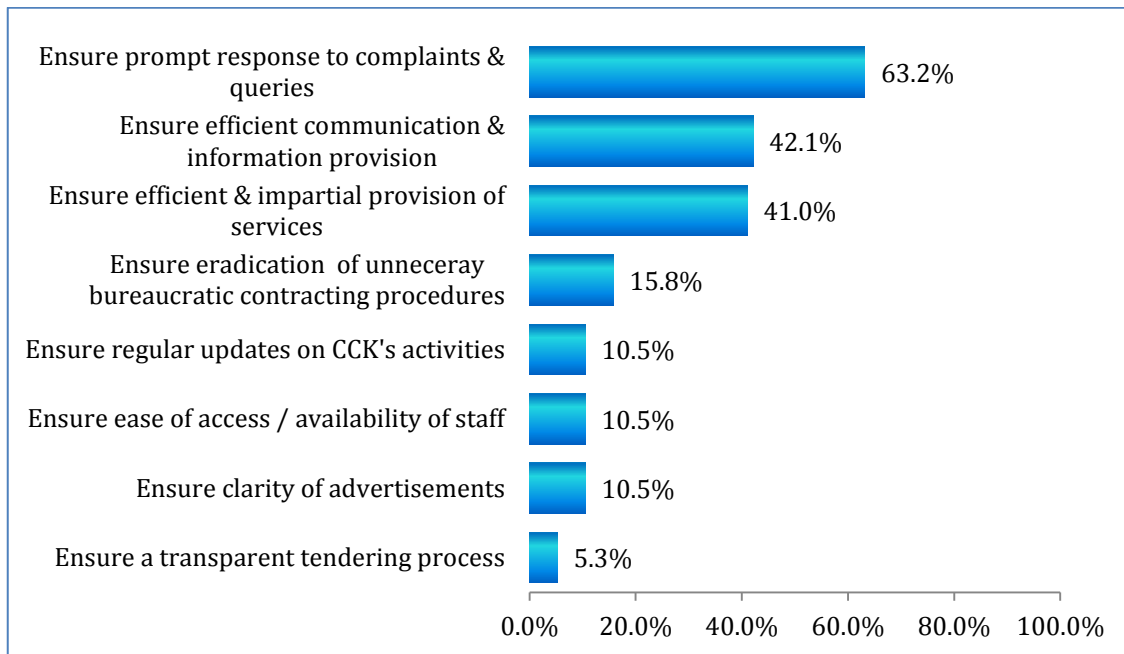
Overall satisfaction with goods acceptance and payment services at CCK is 71.6% as rated by the surveyed suppliers. The table below shows the levels of satisfaction of suppliers with regard to various aspects of goods acceptance and payment.

Aspect of Goods Acceptance and Payments	Year 2012	Year 2013
CCK processes invoices promptly	69.2%	73.2%
<i>CCK pays its suppliers promptly</i>	<i>69.2%</i>	<i>69.6%</i>
CCK's modes of payment are adequate and efficient	71.0%	73.2%
<i>CCK responds to complaints regarding delayed payments promptly</i>	<i>68.7%</i>	<i>69.6%</i>
<i>CCK is unbiased in payment of goods and services to its suppliers</i>	<i>70.6%</i>	<i>71.7%</i>
Overall, goods acceptance and payment processes at CCK are efficient	70.6%	72.2%
Mean Index	69.9%	71.6%

On a scale of 1 – 10 where 1 is very dissatisfied and 10 is very satisfied, how would you rate your level of satisfaction with the following aspects of service provision at CCK?

3.3.9 Key areas of Service Provision that would ensure a satisfied customer

Asked what key areas of service provision that would ensure that the Commission’s customers are satisfied, the following were mentioned: *ensure a transparent tendering process, ensure clarity of advertisements, ensure ease of access / availability of staff, ensure regular updates on CCK’s activities, ensure eradication of unnecessary bureaucratic contracting procedures, ensure efficient and impartial provision of services, ensure efficient communication and information provision and ensure prompt response to complaints and queries.*



In your opinion, what are the THREE key factors that ensure a customer is satisfied with overall service provision.

3.3.10 Overall Satisfaction with CCK (Suppliers)

Area	Unweighted Customer Satisfaction Index (CSI) %	Weighted Customer Satisfaction Index (CSI) %
CCK Environment	82.5	85.1
Overall satisfaction - Service provision	76.5	78.9
CCK Employees - Professionalism	74.3	76.6
Goods acceptance and payment services	69.4	71.6
Service Provision	71.3	73.6
Information and Communication	66.6	68.7
Contracting services	75.1	77.5
Procurement services	76.0	78.4
Overall Mean Index	74.0	76.3

3.4 Partner and affiliate institutions

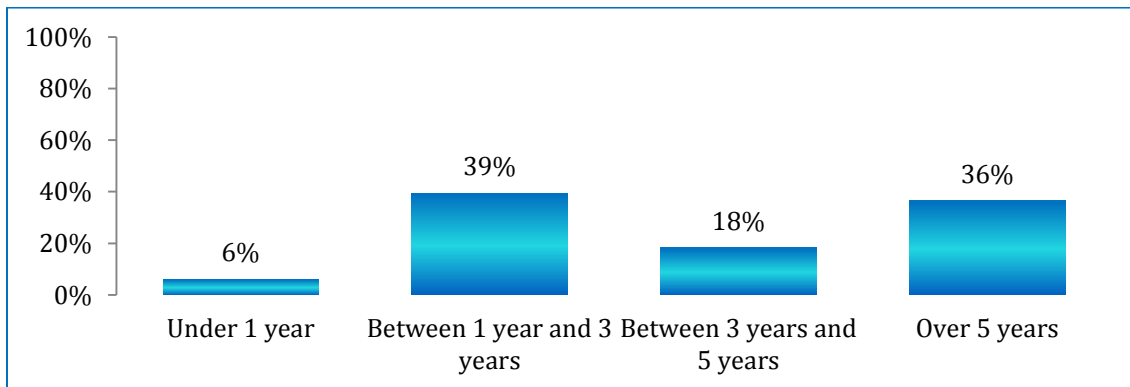
The Commission works closely with several other institutions key of which are: the media, government and government agencies, consumer organizations and affiliated international organizations. These institutions engage with the Commission through partnerships and/or as service recipients of ICT services.

Amongst this category of the Commission’s customers, the survey sought to measure the extent to which these institutions are satisfied with the manner in which the Commission discharges its roles and mandate.

The key areas of service provision that were assessed include: *length of relationship between institutions and the Commission, roles and mandates of the Commission, social responsibility by the Commission, the Commission’s employees, information and communication, the Commission’s environment and overall service provision.*

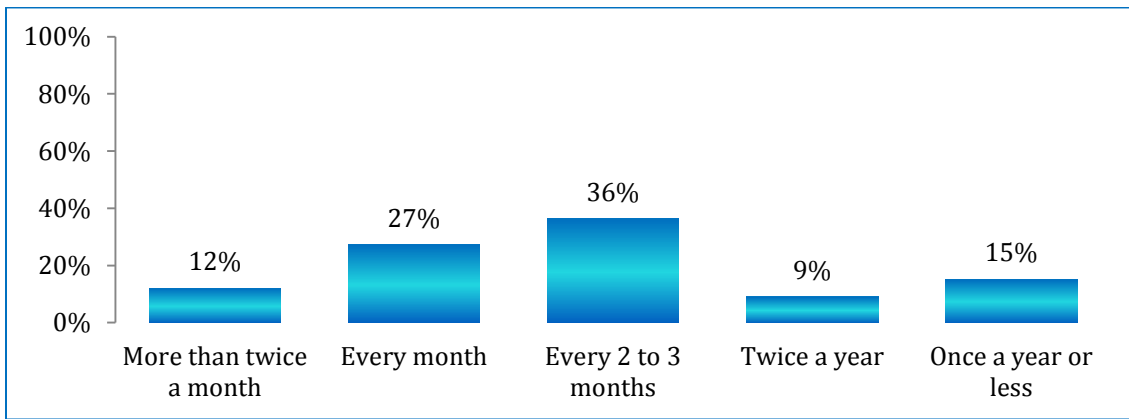
3.4.1 Relationship with Communications Commission of Kenya (CCK)

A majority of the institutions that participated in the survey (57%) have dealt with CCK for a period ranging from one to five years while 36% have had a relationship with the Commission for a period of more than 5 years. Only 6% of the institutions surveyed have been dealing with CCK for less than a year.



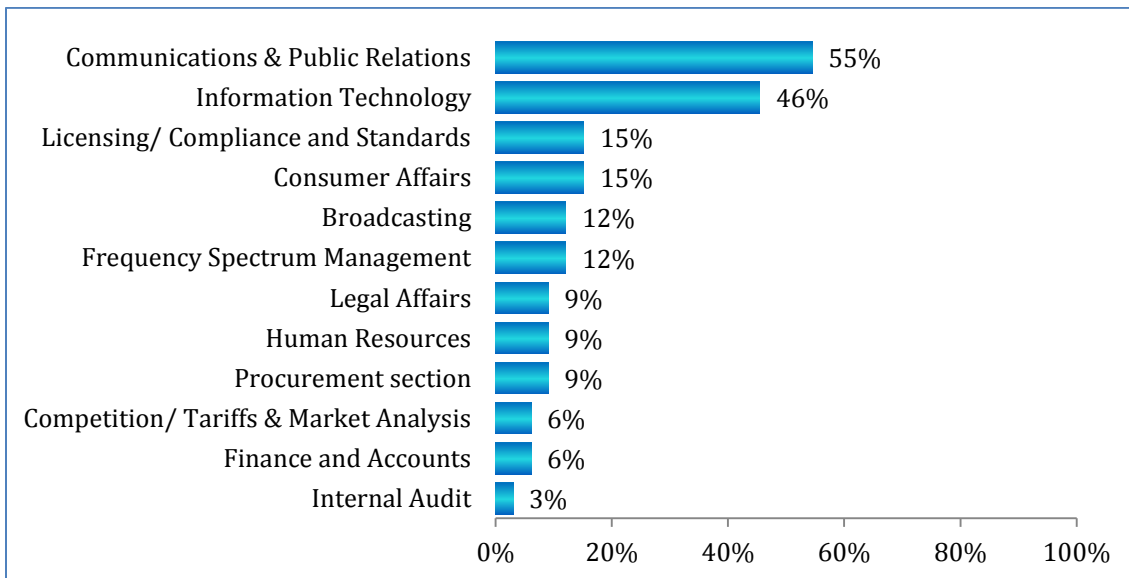
How long has your organization dealt with the Communications Commission of Kenya? n=36

Most of the institutions surveyed (36%) indicated that they interact with CCK every 2 to 3 months while 15% interact with them once a year or less.



How often do you interact with the Communications Commission of Kenya? n=36

Survey results show that the institutions mostly interact with the Consumers and Public Affairs (55%) and Information Technology (42%) departments. Other departments interacted with are; *Licensing, Compliance and Standards department, Consumer Affairs department, Broadcasting department, Frequency Spectrum Management department, Legal Affairs department, Human Resources department, Procurement section department, Competition, Tariffs and Market Analysis department, Finance and Accounts and Internal Audit department.*

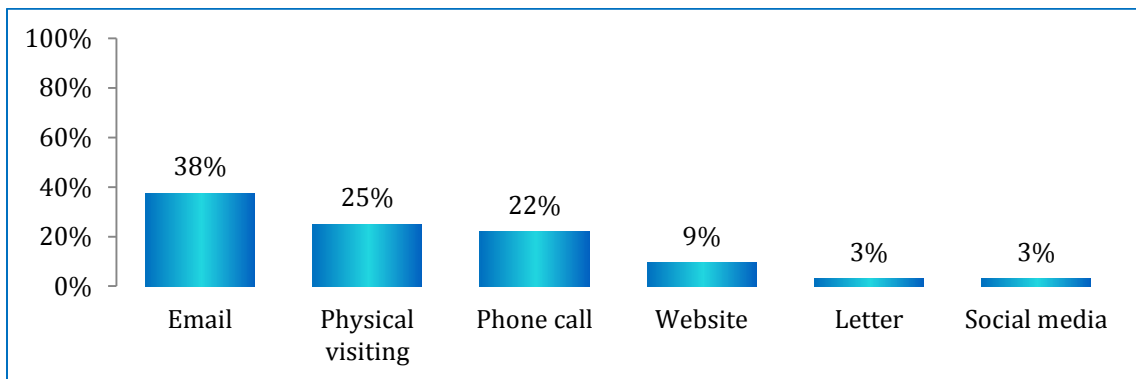


Which office within CCK do you interact with? n=36

The table below provides a cross analysis of how often institutions interact with CCK by department. *(See table below)*

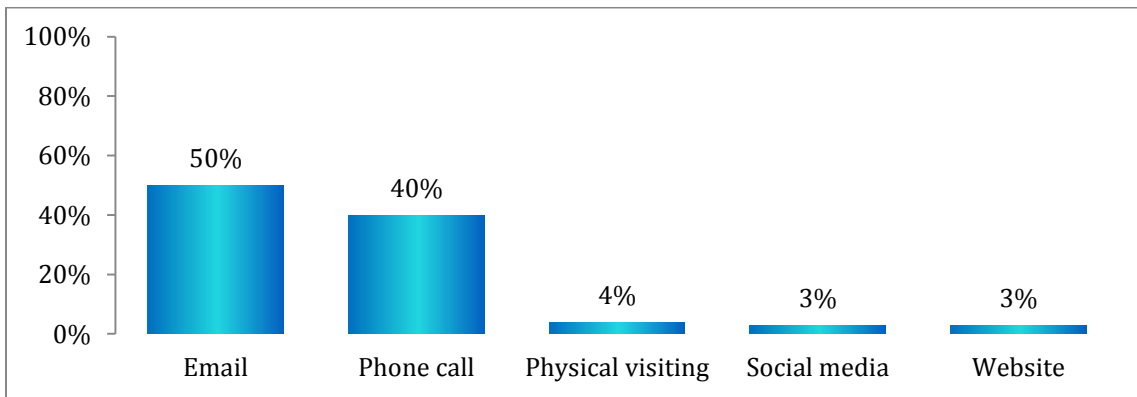
Which Department/office within CCK do you interact with?	How often do you interact with the Communications Commission of Kenya (CCK)?				
	More than twice a month	Every month	Every 2 to 3 months	Twice a year	Once a year or less
Communications and Public Relations	80%	22%	42%	67%	60%
Information Technology	60%	78%	50%	67%	20%
Internal Audit	20%	0%	0%	0%	0%
Procurement section	20%	0%	25%	0%	0%
Frequency Spectrum Management	20%	0%	17%	67%	0%
Human Resources	20%	22%	0%	0%	20%
Consumer Affairs	40%	0%	17%	33%	0%
Finance and Accounts	20%	0%	0%	33%	0%
Licensing/ Compliance and Standards	60%	0%	17%	0%	20%
Competition/ Tariffs and Market Analysis	20%	11%	0%	0%	0%
Legal Affairs	20%	0%	8%	0%	20%
Broadcasting	20%	0%	17%	0%	20%

The main mode of interaction with the Commission is through email as indicated by approximately four in ten of the institutions surveyed. Other modes of interaction with the Commission are: physical visits, phone calls, website visits, letters and social media. *(See chart below)*



Through what means did you interact with CCK? n=36

However, when asked which means of communication they would prefer to interact with the Commission, majority of the institutions cited e-mails and phone calls. *(See chart below)*



Through what means did you prefer to interact with CCK?

3.4.2 Satisfaction with Role and Mandate of CCK

Institutions surveyed rated their satisfaction with CCK on its roles and mandate at an overall score of 65.9 points out of a possible 100 points in the year 2012/2013. Compared to other areas assessed under roles and mandate of the Commission, the highest satisfaction scores were recorded in the Commission's role in *licensing of the communications service providers (71.2%) together with facilitation of online/ electronic businesses (68.6%)*. On the other hand, lowest scores were registered on the Commission's roles on management of Universal Access Fund (62.5%), management of competition in the sector to ensure a level playing ground for all players (62.5%) and protection of consumer rights within the communications environment (62.5%). (See the table below for further information)

Roles and Mandate of CCK	Year 2012	Year 2013
Licensing of the communications service providers	63%	71.2%
Facilitation of online/electronic businesses	67%	68.6%
Approval and acceptance of communications equipment meant for use in the country	67%	67.2%
Regulation of the telecommunication tariffs	66%	67.2%
Management of the country's frequency spectrum and numbering resources	67%	65.5%
<i>Monitoring of the activities of licensees to enforce compliance with the license terms and conditions as well as the law</i>	<i>67%</i>	<i>64.0%</i>
<i>Protection of consumer rights within the communications environment</i>	<i>68%</i>	<i>62.5%</i>
<i>Management of competition in the sector to ensure a level playing ground for all players.</i>	<i>68%</i>	<i>62.5%</i>
<i>Management of the Universal Access Fund</i>	<i>67%</i>	<i>62.5%</i>
Overall performance of roles	66.7%	65.9%

Overall, on a scale of 1 – 10 where 1 is very dissatisfied and 10 is very satisfied, how would you rate your satisfaction with CCK's main role as Kenya's regulator for the information and communications sector?

3.4.3 Satisfaction with CCK's Social Responsibility

With regard to *social responsibility*, the institutions surveyed rated the Commission at 61.3 percentage points in the year 2012/2013. This reflects insignificant change in satisfaction in the areas assessed under *social responsibility*. (See the table below)

Aspects of Information and Communication	Year 2012	Year 2013
<i>Addressing of community needs</i>	62%	61.9%
<i>Implementing projects in the community</i>	62%	60.3%
Overall satisfaction with CCK's social responsibility	61.7%	61.3%

On a scale of 1 -10 where 1 is very satisfied 10 very dissatisfied, how would you rate your satisfaction/dissatisfaction with the following CCK's social responsibility?

3.4.4 Satisfaction with CCK's employees

Survey institutions that participated in this survey round rated the Commission's employees at an overall satisfaction of 71.0 percentage points in the year 2012/2013. This reflects a small improvement of 1.4 percentage points. The key areas of improvement are *knowledge of the Commission's products and services* and *technical skills of staff to ensure efficiency in service delivery*. On the other hand, the key areas that recorded lower satisfaction ratings as compared to other measurement areas are: *prompt services and ease of accessibility of the Commission's staff*. (See the table below).

Aspect	Year 2012	Year 2013
CCK staff have the necessary technical skills to ensure efficiency in service delivery	72%	75.6%
CCK staff have good knowledge of their products and services	66%	74.0%
CCK staff are able to solve problems and give valuable advice	73%	73.4%
<i>CCK staff are flexible in accommodating various client needs/queries</i>	<i>67%</i>	<i>69.9%</i>
<i>CCK staff are easily accessible</i>	<i>72%</i>	<i>67.8%</i>
<i>CCK staff offer prompt services</i>	<i>69%</i>	<i>65.1%</i>
Overall Satisfaction Index on Environment	69.60%	71.0%

Overall, on a scale of 1 – 10 where 1 is very dissatisfied and 10 is very satisfied, how would you rate your satisfaction with CCK's main role as Kenya's regulator for the information and communications sector?

A key area of improvement suggested by the institutions surveyed is ensuring prompt response to queries and complaints raised by the Commission's staff as indicated by approximately two in ten of the survey respondents. This is a function of staffing thus the need to ensure staff are readily available and able to provide answers and solutions in real time.

3.4.5 Satisfaction with CCK's Information and Communication

Overall satisfaction with the Commission's information and communications is 66.8% in the year 2012/2013 amongst the institutions surveyed. From the table below, this shows a 1.2 percentage decrement in satisfaction from the year 2011/2012. The key area that recorded a significant reduction in satisfaction is *flow of information between the Commission and its stakeholders*. Compared to other measurement areas, *consistency and dependability of information provided by CCK* was rated the highest at 68.1% while *efficient flow of information between CCK and its stakeholders* was rated the lowest at 65.7%.

Aspects of information and communication	Year 2012	Year 2013
The information provided by CCK to its stakeholders is consistent and dependable	70%	68.1%
The information provided by CCK to its stakeholders is clear and easy to understand	68%	67.5%
<i>CCK provides timely information and feedback to its stakeholders</i>	<i>63%</i>	<i>65.9%</i>
<i>There is efficient flow of information between CCK and its stakeholders</i>	<i>70%</i>	<i>65.7%</i>
Overall satisfaction index	68.0%	66.8%

On a scale of 1 -10 where 1 is totally agree and 10 totally disagree, how would you rate your agreement/disagreement with regard to the following aspects of information and communication at CCK of payment services by CCK?

Indeed information and communication is considered by the survey respondents as key in service provision. When asked which key areas they would advise the Commission to concentrate on to ensure satisfied customers, a higher proportion of the institutions surveyed (35%) cited information and communication channels. A further 21% stressed the need for ensuring promptness in addressing queries and complaints.

3.4.6 Satisfaction with CCK's Environment

Overall, satisfaction with the Commission's environment is 80.5% as rated by institutions surveyed. The table below shows the level of satisfaction of institutions with aspects of environment at CCK.

Environment Aspect	Year 2012	Year 2013
Adoption and use of technology	71%	83.1%
Labelling of offices	73%	82.5%
Cleanliness / tidiness	71%	81.1%
Interior design and ambience	74%	81.1%
Security of CCK offices	73%	80.2%
Overall environment	73%	80.2%
Staff diversity e.g. gender, ability	73%	78.6%
<i>Accessibility of CCK offices</i>	<i>74%</i>	<i>77.3%</i>
Overall Satisfaction Index	72.6%	80.5%

On a scale of 1 -10 where 1 is totally disagree and 10 totally agree, how would you rate your agreement/ disagreement with regard to the following aspects of information and communication at CCK?

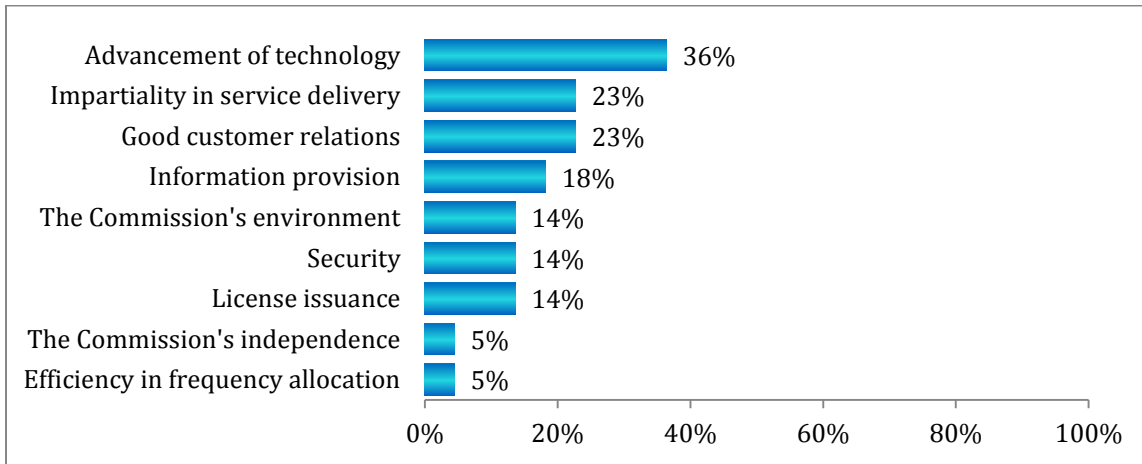
3.4.7 Satisfaction with Service Provision at CCK

The Commission recorded an overall satisfaction score of 69.1 percentage points in the year 2012/2013, an increment of 2.4 percentage points from the year 2011/2012. *Provision of reliable reports and reviews* recorded the highest satisfaction score of 75.4% while protection of rights of consumers with regard to price and quality of services recorded the lowest at 63.8%.

Service Provision Aspect	Year 2012	Year 2013
Provision of reliable reports and reviews	66%	75.4%
Provision of timely reports and reviews	65%	69.8%
Efficiency in resource utilization	68%	69.5%
Overall service delivery	67%	69.4%
Flexibility in service delivery	68%	68.9%
Monitoring and evaluation of activities	69%	68.9%
Promptness in responding to clients' needs/queries	63%	68.7%
Procedures put in place to ensure efficiency in service delivery	64%	68.7%
<i>Efficiency in handling of complaints</i>	<i>65%</i>	<i>68.6%</i>
<i>Involvement of stakeholders in planning and implementation of activities</i>	<i>67%</i>	<i>67.9%</i>
<i>Protection of rights of consumers with regard to price and quality of services</i>	<i>71%</i>	<i>63.8%</i>
Overall Satisfaction Index on service provision	66.7%	69.1%

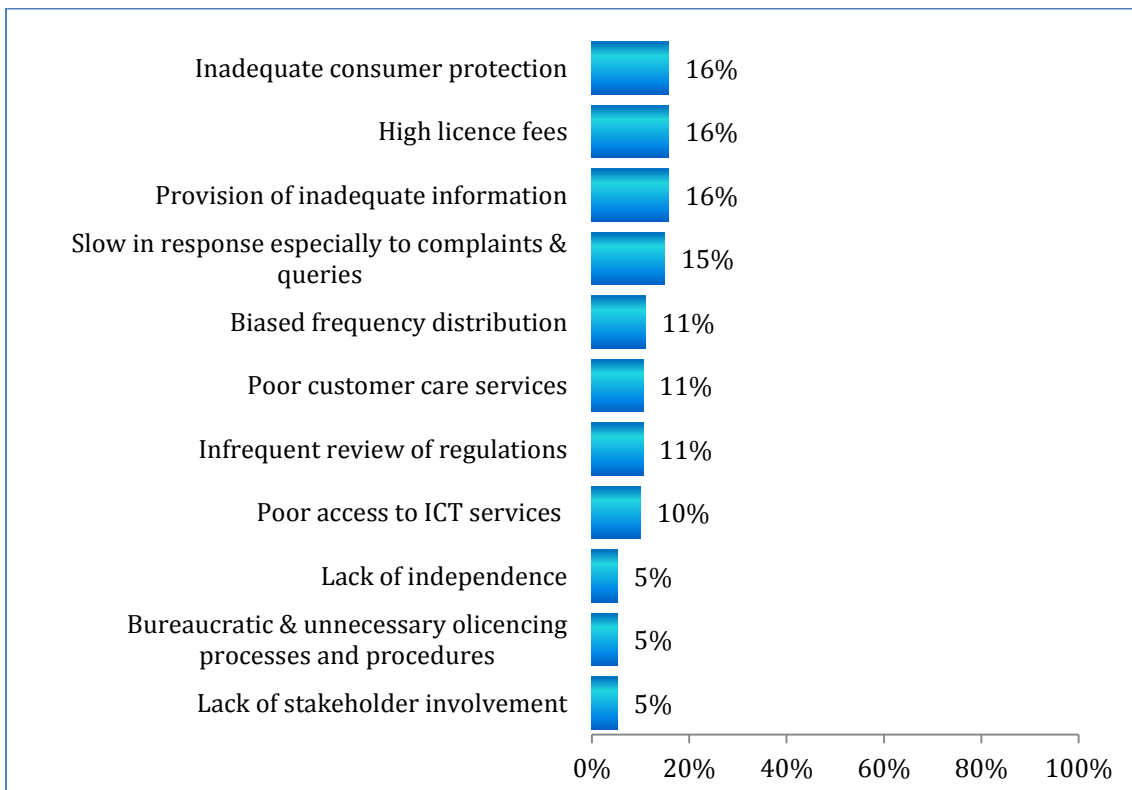
On a scale of 1 -10 where 1 is very dissatisfied and 10 very satisfied, how would your level of satisfaction with the following aspects of service provision at CCK ?

Asked which areas of service provision they are satisfied with, a higher proportion of the institutions surveyed cited CCK's role in advancement of technology at 36%. Other key areas of satisfaction include; *impartiality in service delivery (23%) and good customer relations 23%*.



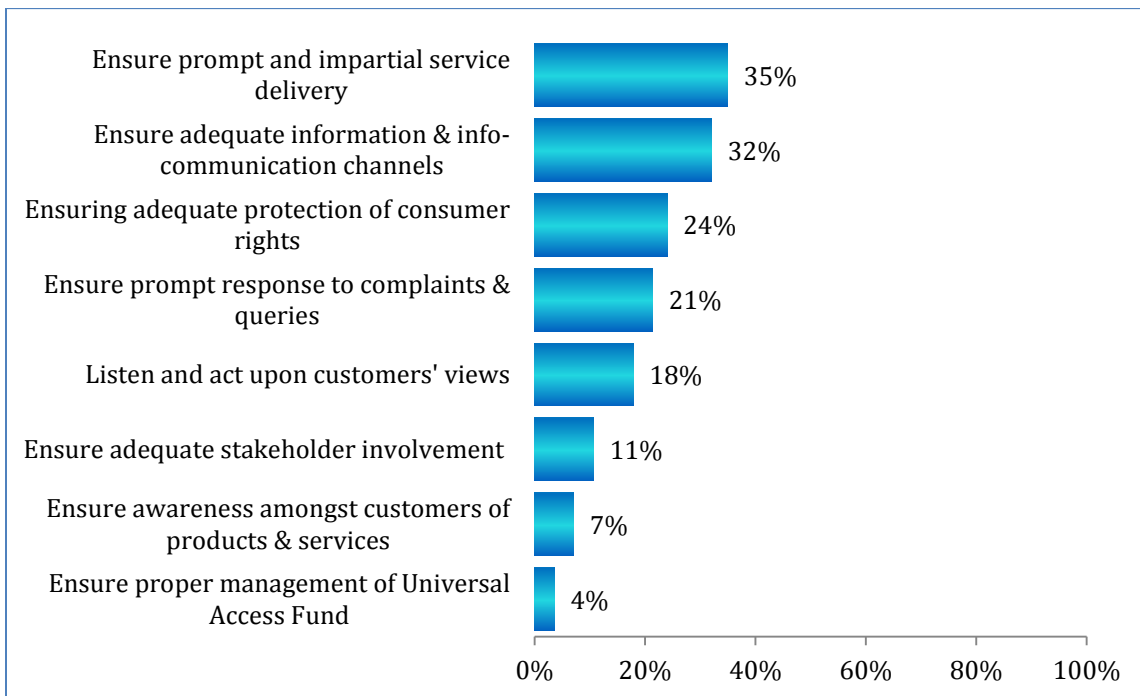
With regard to CCK as an institution and as a service provider, what THREE key areas would you say you are very satisfied in?

With regard to areas of dissatisfaction, institutions surveyed cited the following; *inadequate consumer protection, lack of stakeholder involvement, bureaucratic and unnecessary licensing processes and procedures, lack of independence, poor access to ICT services, infrequent review of regulation, poor customer care services, biased frequency distribution, slowness in response especially to complaints and queries, provision of inadequate information, high licence fees and inadequate consumer protection.*



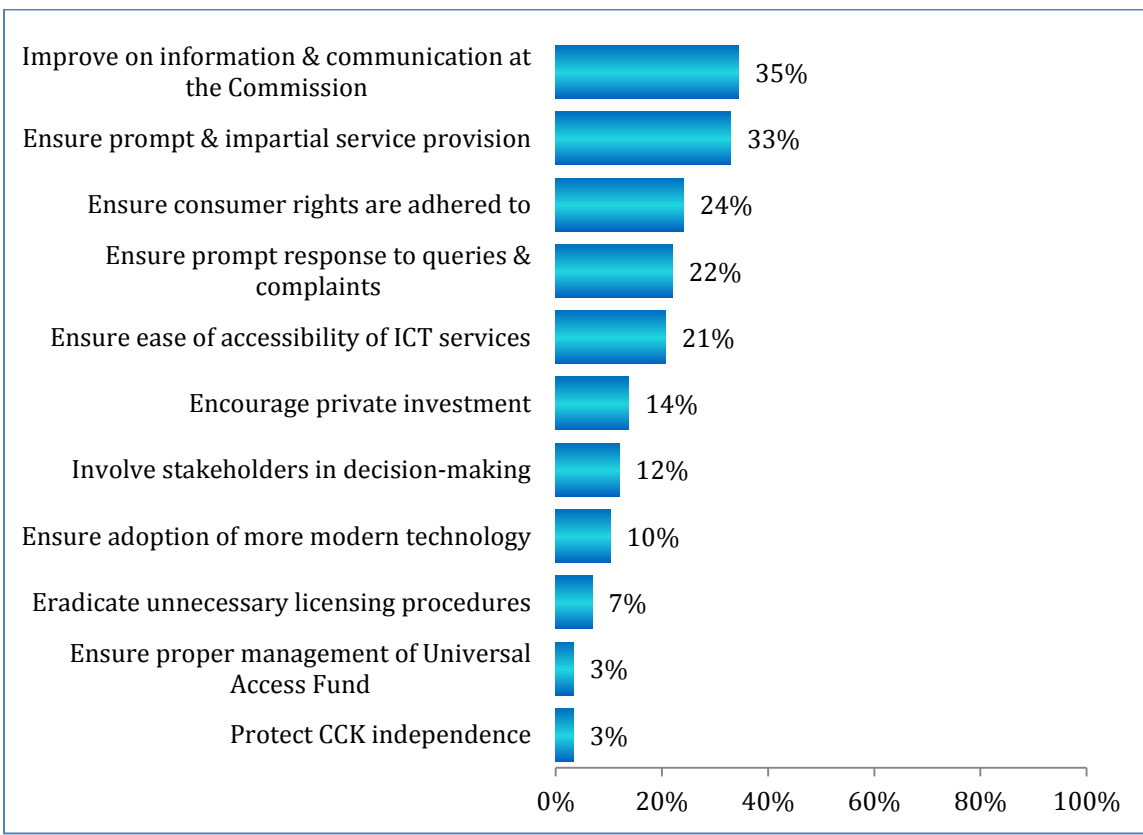
With regard to CCK as an institution and as a service provider, what THREE key areas would you say you are very dissatisfied in?

Asked what key factors of service provision would ensure that the Commission’s customers are satisfied, a higher proportion of the institutions surveyed (35%) cited *prompt and impartial service delivery* and *provision of adequate information and ensuring properly functioning info-communication channels* (32%). Other key areas mentioned include; *Ensuring adequate protection of consumer rights, ensure proper management of Universal Access Fund, ensure awareness amongst customers of products and services, ensure adequate stakeholder involvement, listen and act upon customers' views and ensure prompt response to complaints and queries.* (See the chart below)



If your opinion, what are the THREE key factors that ensure a customer is satisfied with overall service provision?

In relation to the above, institutions surveyed were asked to give recommendations to the Commission on key areas of service provision that would ensure that its customers are satisfied. The key areas mentioned are: *Protect CCK independence, ensure proper management of Universal Access Fund, eradicate unnecessary licensing procedures, ensure adoption of more modern technology, ensure involvement of stakeholders in decision-making, encourage private investment, ensure ease of accessibility of ICT services, ensure prompt response to queries and complaints, ensure consumer rights are adhered to, ensure prompt and impartial service provision and improve on information and communication at the Commission.* (See the chart below)



Assuming that you are the Director General of the Communications Commission of Kenya (CCK), which key areas of service provision would you concentrate on to help ensure that you as a customer is very satisfied?

3.4.8 Overall Satisfaction Index [Institutions]

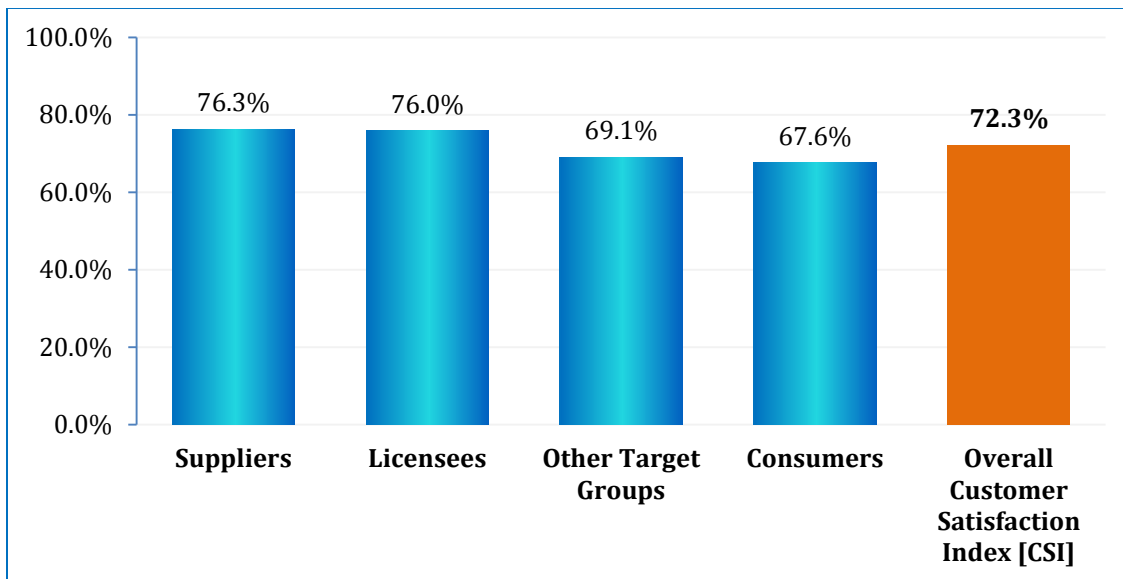
Area	Year 2012		Year 2013	
	Unweighted CSI	Weighted CSI	Unweighted CSI	Weighted CSI
CCK Environment	72.6	74.7	78.1	80.5
CCK Employees	69.6	71.7	68.8	71.0
Service provision	66.7	68.8	67.0	69.1
Information and Communications	68.0	70.1	64.8	66.8
Roles and Mandate	66.7	68.8	63.9	65.9
Social responsibility	61.7	63.8	59.5	61.3
Overall Mean Customer Satisfaction Index (CSI)	67.6	69.7	67.0	69.1

Chapter 4 Conclusions and Recommendations

4.1 Conclusions

The overall Customer Satisfaction Index (CSI) for the financial year 2012/2013 is 72.3 points out of the optimal 100 index points. Comparing the FY 2011/2012 and FY 2012/2013 overall Customer Satisfaction Index points, a significant increase in satisfaction index of **+1.3** points was recorded in the 2013 survey round. Increase in satisfaction was mainly recorded amongst the suppliers (+3.3 points), licensees at (+1.6 points) and consumers (0.9%). On the other hand, an insignificant decrease in satisfaction of 0.7% was recorded amongst the *institutions category (government and government agencies, media, education institutions, partners, consumer organizations) (-0.7 points)*.

Suppliers and Licensees recorded the highest satisfaction index of **76.3** points and **76.0** points respectively while the institutions and consumers had lower satisfaction scores of **69.8** points and **67.6** points respectively in the 2013 survey round.



4.1.1 Licensees

As part of its mandate, the Commission licenses and regulates licensees who act as providers of services in the communication sector. The survey sought to measure the extent to which licensees are satisfied with the manner in which the Commission *discharges its roles and mandate together with measuring satisfaction with the Commission's customer care staff, information and communication, the Commission's environment and payments.*

Majority of the surveyed institutions have had a relationship with the Commission for over three years with three in four indicating that they interact with CCK 1 – 2 times a year mainly through physical visits. Licensing, Compliance and Standards department, Communications and Public Relations department and Information Technology department are the most contacted departments by the licensees surveyed.

Amongst licensees surveyed, overall satisfaction with regard to services offered by the Commission in the FY 2012/2013 is 76%; an increase from 74% recorded in the FY 2011/2012. Generally, the highest rated satisfaction areas are; **roles and mandate** (licensing of the communications service providers, monitoring of activities of licensees to enforce compliance with the license terms and conditions); **staff** (good knowledge of CCK's products and services, have the necessary technical skills to ensure efficiency in service delivery); **information and communication** (clarity and ease of understanding of communication provided by CCK).

On the other hand, key areas that were rated lowly as compared to other assessment areas include; **roles and mandate** (facilitation of online/electronic businesses, protection of consumer rights within the communications environment, management of competition in the sector to ensure a level playing ground for all players, management of the Universal Access Fund), **social responsibility** (addressing of community needs and implementing projects in the community); **staff** (offering of prompt services and flexibility in accommodating various client queries/need, ease of accessibility); **information and communication** (provision of timely information and feedback to its stakeholders, consistency and dependability of information provided by the Commission); **invoicing and receipt payments** (efficiency in handling complaints on invoicing and receipt payment processes, fairness in handling of invoicing and receipt payment processes).

The key gaps in service delivery can mainly be attributed to *institutional policies and regulations, skills set of the Commission's staff and their integrity.* This calls for enhancing capacity of staff so

as to ensure that they have the necessary knowledge skills to address the service challenges at hand and most importantly to feed back in a coherent manner that guarantees satisfied customers. Further, there is need for the Commission to identify procedures that serve to delay services and verify their importance in service processes. This will ensure that only absolutely essential procedures remain in place to ensure prompt delivery of services with the net effect of increased number of satisfied customers.

4.1.2 Consumers

The consumers are the main beneficiaries of the information and communication services offered by communication service providers who are licensed and regulated by the Communications Commission of Kenya. In this regard, majority of the consumers interact with the Commission through third party arrangements while in certain instances, a few interact with the Commission directly.

Amongst the consumers surveyed the study sought to assess satisfaction with the Commission with regard to consumer rights, customer care, information and communication, adequacy, affordability and accessibility of services provided by communication service providers.

Nearly all consumers who participated in the study mainly associate CCK with regulation of communication and information products and services in Kenya through formulation and implementation of required regulations that guide the communication industry e.g. proscription of counterfeit phones, ensuring registration of SIM cards, implementing policy on digital migration, monitoring and controlling of communication costs/tariffs, licensing of frequencies etc.

While nearly all consumers surveyed correctly associate CCK with an aspect of its roles and mandate, it is important for CCK to properly communicate what it stands for. This is due to the fact that a considerable number of the consumers surveyed believe that CCK is in charge of information and communication as far as provision of communication products and services are concerned. While this is partly true as far as regulation is concerned, actual provision of communication products and services is done through third parties that are regulated by CCK. The consumer needs to be educated on this to enhance knowledge and perception of CCK.

It is therefore important that the Commission enhances its education programme to its customers, especially the consumers through use of better and popular communication tools so

as reach all its customers and in effect address the knowledge gap and scale-up demand and utilization of its available services.

The television acts as the main source of awareness and knowledge of CCK. However, it is important to note that majority of the survey respondents (80%) would prefer the radio as opposed to TV (73%) when it comes to getting information about CCK. This is in line with the common fact that more Kenyans have access to radio as compared to the television. Thus it is important that CCK relays advertisements and information using popular communication media so as to enhance reach to majority of Kenyans, if not all. This will also enhance information on CCK passed through word of mouth by family, friends and colleagues.

While only 4.2% of consumers surveyed have directly contacted CCK, a higher proportion (42%) has done so through phone calls, emails (27%) and physical visits (16%). Asked through what mode of communication they would prefer to use when contacting the Commission, a higher proportion of the respondents (38%) cited phone calls while 20% indicated physical visits. It is important that CCK puts in place measures that will ensure ease of communication with its customers. Such measures should be predicated on ease of accessibility, promptness in feedback and most importantly, satisfactory handling of complaints. This will ensure a reduction and if possible eradication of physical visits which is expensive to service recipients and service providers in the long run.

Two key aspects of the Commission's roles that were assessed amongst the consumers are **enforcement of Consumer Rights** and **provision of communication services** through third party arrangements. Of the rights assessed regarding enforcement of consumer rights, *'the right to privacy'* and *'the right to be educated'* recorded the highest satisfaction scores amongst consumers at 67.6% and 67.2% respectively while *'the right to have access to basic communications services at reasonable prices'* recorded the lowest ratings at 62.7%.

While this is the case, it is important to note that at the time of the survey, a considerable number of consumers (approximately 40% of those surveyed) did not exhibit any awareness of their rights with regard to communication services. It is therefore imperative that the Commission enhances its education programme to address knowledge gaps as shown by consumers surveyed.

With regard to provision of communication services through telecommunication operators and service providers, majority of the survey respondents affirmed satisfaction with

'advertisements', 'availability' and 'accessibility' of communication services through *mobile phone services, landline/fixed telephone services, data/internet services, television services, radio services, postal and courier services*. On the other hand, key areas that received the lowest satisfaction scores amongst the consumers are *complaints handling services, customer care services and pricing services*.

4.1.3 Suppliers

Through supplying of goods and services to CCK, suppliers interact directly with the Commission. Amongst suppliers surveyed, the survey sought to measure their satisfaction with CCK regarding *work environment, customer care function and procurement, contracting and payment of goods and services*.

Survey results show that majority of suppliers surveyed (71%) have had a relationship with CCK for over 3 years with nearly one half of this group interacting with the Commission at least once monthly mainly through physical visits. In this regard, CCK needs to be attentive to the physical environment of its offices to enhance image and satisfaction. Specifically, more attention needs to be directed to *Procurement department, Finance and Accounts department and Communications and Public Relations department* which form the main departments that are visited by suppliers and thus derive services.

Overall satisfaction amongst suppliers with services offered by the Commission is 76.3%. The highest rated satisfaction areas include; **environment** (security of CCK offices and adoption of technology); **staff** (good knowledge of CCK's products and services, have the necessary technical skills to ensure efficiency in service delivery and are easily accessible); **information and communication** (clarity and ease of understanding of communication provided by CCK, efficient flow of information between CCK and its stakeholders); **procurement services** (clear and unambiguous advertisements of tenders, transparent and accountable procurement services, abiding by set conditions of each tender); **contracting services** (expeditious drawing and execution of accurate contracts, clear and fair contract terms, honouring of contracts); **goods acceptance and payment services** (adequate and efficient modes of payment).

On the other hand, key areas that were rated lowly as compared to other assessment areas include; **staff** (ability of staff to solve problems and give valuable advice, offering of prompt services and flexibility in accommodating various client queries/need); **information and communication** (provision of timely information and feedback to its stakeholders);

procurement services (provision of prompt feedback on complaints raised with regards to tender processes, provision of prompt feedback on the results of its tender processes); **contracting services** (fair and expeditious processing of contract extensions); **goods acceptance and payment services** (prompt payment of suppliers, prompt response on complaints on delayed payments).

As indicated above, majority of the dissatisfaction areas emanate from inability by the Commission's staff and those in positions of responsibility to handle services professionally and diligently. It is therefore imperative that CCK empowers its staff so as to enhance service provision and therefore satisfaction. It is important to note that when asked what key factors would ensure that a customer is satisfied with overall service provision, majority of the suppliers surveyed mentioned; prompt and satisfactory response to complaints raised, efficient provision of information, efficient and impartial provision of services and ensuring ease and accessibility of staff; all these issues revolve around staff abilities, competence and integrity. On the other hand, lack of flexibility in accommodating clients' needs/queries may be attributed to bureaucratic procedures which more often than not results into long and winding processes that delay service delivery, a cause for dissatisfaction.

4.1.4 Institutions

Through partnerships and/or as service recipients of ICT services, the Commission works closely with several institutions key of which are: *the media, government and government agencies, consumer organizations and affiliated international organizations*. Amongst the institutions surveyed, the survey sought to measure satisfaction with the Commission's *discharge of its roles and mandate, work environment, information and communication, customer care staff, social responsibility and service provision*.

Majority of the surveyed institutions have had a relationship with the Commission for over three years with three in four indicating having interacted with CCK at least once every quarter mainly through emails. Public Relations department and Information Technology department are the most contacted departments by the institutions surveyed.

Overall satisfaction in the FY 2012/2013 amongst institutions surveyed with regard to services offered by the Commission is 69.1%; an insignificant decrease of 0.6% from the FY 2011/2012. The highest rated satisfaction areas include; **roles and mandate** (licensing of the

communications service providers, regulation of the telecommunication tariffs, Approval and acceptance of communications equipment meant for use in the country); **staff** (good knowledge of CCK's products and services, have the necessary technical skills to ensure efficiency in service delivery and are easily accessible); **information and communication** (clarity and ease of understanding of communication provided by CCK, consistent and dependable); **service provision** (provision of reliable reports and reviews, provision of timely reports and reviews).

On the other hand, key areas that were rated lowly as compared to other assessment areas include; **roles and mandate** (monitoring of the activities of licensees to enforce compliance with the license terms and conditions as well as the law, protection of consumer rights within the communications environment, management of competition in the sector to ensure a level playing ground for all players, management of the Universal Access Fund), **social responsibility** (addressing of community needs and implementing projects in the community); **staff** (offering of prompt services and flexibility in accommodating various client queries/need, ease of accessibility); **information and communication** (provision of timely information and feedback to its stakeholders, efficiency in flow of information between the Commission and its stakeholders); **service provision** (efficiency in handling complaints, involvement of stakeholders in planning and implementation of activities).

The key dissatisfaction areas may be attributed to the **Commission's staff** and **institutional policies and procedures**. It is imperative that the Commission enhances its staffs' capacity to deliver satisfactory services to its customers, key among them are the institutions which unlike consumers may require services of complex nature thus the need for requisite knowledge and communication skills by staff.

It is also important to review all communications that the Commission issues so as to address the gaps with regard to their dissemination. More specifically, the Commission should ensure timely information dissemination and ensure efficiency in its flow from CCK to its stakeholders.

Further, it is imperative for the Commission to involve all its stakeholders in all activities to instil a sense of greater ownership of programmes and systems that are beneficial to its customers. One of the key areas that received low satisfaction scores (61.3%) is the aspect of social responsibility which was rated the lowest by other target groups mainly made up of institutions that CCK considers as its partners. Any corporate social responsibility activities must involve all stakeholders to ensure awareness, relevance and acceptance.

4.2 Recommendations

1. **Staff capacity and Procedures and Processes:** Survey results show that the key gaps in service delivery are mainly attributed to *institutional policies and regulations, skills set of the Commission's staff and their integrity*.
 - a. Majority of the dissatisfaction areas emanate from inability by the Commission's staff and those in positions of responsibility to handle services professionally and diligently. This calls for enhancing capacity of staff so as to ensure that they have the necessary knowledge skills to address the service challenges at hand and most importantly to feed back in a coherent manner that guarantees satisfied customers.
 - b. Further, there is need for the Commission to identify procedures that serve to delay services and verify their importance in service processes. This will ensure that only absolutely essential procedures remain in place to ensure prompt delivery of services with the net effect of increased number of satisfied customers.

2. **Consumer Education:** While nearly all consumers surveyed correctly associate CCK with an aspect of its roles and mandate, it is important for CCK to properly communicate what it stands for. This is due to the fact that a considerable number of the consumers surveyed believe that CCK is in charge of information and communication as far as provision of communication products and services are concerned.
 - a. It is therefore important that the Commission enhances its education programme to its customers, especially the consumers through use of better and popular communication tools so as reach all its customers and in effect address the knowledge gap and scale-up demand and utilization of its available services.
 - b. At the time of the survey, a considerable number of consumers (approximately 40% of those surveyed) did not exhibit any awareness of their rights with regard to communication services. It is therefore imperative that the Commission enhances its education programme to address knowledge gaps as shown by consumers surveyed.

3. **Communication mode and Reach:** The television acts as the main source of awareness and knowledge of CCK. However, it is important to note that majority of the

survey respondents would prefer the radio as opposed to TV when it comes to getting information about CCK. This is in line with the common fact that more Kenyans have access to radio as compared to the television.

- a. Thus it is important that CCK relays advertisements and information using popular communication media so as to enhance reach to majority of Kenyans, if not all. This will also enhance information on CCK passed through word of mouth by family, friends and colleagues.

4. **Ease and Preference in communication:** Majority of consumers mainly communicate with CCK phone calls, emails and physical visits. However, survey results show that majority of the Commission's customers prefer phone calls as opposed to other modes of communication.

- a. It is important that CCK puts in place measures that will ensure ease of communication with its customers. Such measures should be predicated on ease of accessibility, promptness in feedback and most importantly, satisfactory handling of complaints. This will ensure a reduction and if possible eradication of physical visits which is expensive to service recipients and service providers in the long run.

5. **Information dissemination:** Amongst institutions surveyed, provision of timely information and feedback to its stakeholders together with efficiency in flow of information between the Commission and its stakeholders recorded lower satisfaction scores as compared to other areas of measurement.

- a. It is also important to review all communications that the Commission issues so as to address the gaps with regard to their dissemination. More specifically, the Commission should ensure timely information dissemination and ensure efficiency in its flow from CCK to its stakeholders.

6. **Stakeholder involvement and Participation:** Further, it is imperative for the Commission to involve all its stakeholders in all activities to instil a sense of greater ownership of programmes and systems that are beneficial to its customers. One of the key areas that received low satisfaction scores (61.3%) is the aspect of social responsibility which was rated the lowest by other target groups mainly made up of institutions that CCK considers as its partners. Any corporate social responsibility activities must involve all stakeholders to ensure awareness, relevance and acceptance.