



Customer Satisfaction Survey

Fixed Line Results

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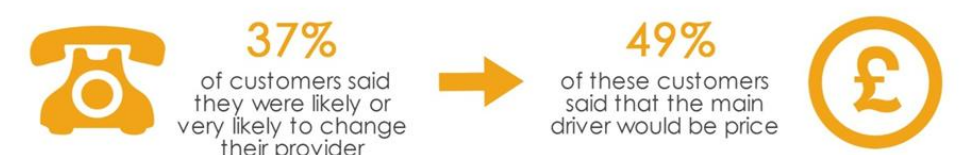
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Telecoms Satisfaction Survey - Headline Results

Fixed Lines - Jersey (JT)



Fixed Lines - Guernsey (Sure)



Introduction

This report on customer satisfaction with fixed line telecoms services is the first of three customer satisfaction reports that we, the Channel Islands Competition and Regulatory Authorities (CICRA), will publish over the coming weeks.

We expect this report to help customers make decisions about which telecoms services they subscribe to and which provider they choose in the future. It will also help telecoms service providers by showing where they may need to improve to better meet their customers' expectations. It will also help us identify the most important issues for customers which will, in turn, inform our future work in the telecoms sector.

We know that customers are particularly interested in three areas: quality of service, billing and issue resolution (through customer services). So in May 2014 we commissioned a survey of 500 customers¹ in each of Jersey and Guernsey seeking their views on these three areas for three types of services - fixed line telecoms services (which are the focus of this report), broadband and mobile services (which will be the focus of future reports).

Currently customers do not have a choice of fixed line provider. JT provides all fixed line services (sometimes referred to as landlines) in Jersey while Sure is the only provider in Guernsey. We are working with operators so that, by 1 June 2015, customers will be able to choose their fixed line provider. We, therefore, intend to repeat the survey at regular intervals and publish the results to provide customers with up-to-date information and track any changes in customer satisfaction.

Quality of Service

Survey participants were asked the following question

'Overall how satisfied are you with the quality of the fixed-line service you receive from your provider?'

Participants were asked to answer on a scale of very satisfied, satisfied, neither satisfied nor dissatisfied, dissatisfied or very dissatisfied.

Neither Sure in Guernsey nor JT in Jersey scored highly with only 57% in Guernsey rating Sure's quality of service as satisfactory or higher and 45% in Jersey rating JT's quality of service from JT as satisfactory or higher.

¹ Island Analysis undertook the survey using primarily online survey methodology with the proviso that, if the sample achieved did not truly cover a robust sample of the community, there was an option to carry out face-to-face interviews. A robust sample of 500 in each island was achieved. The survey and the sample response were also robust in terms of quality and depth of response.

Billing

Survey participants were asked the following question

‘How satisfied are you with regard to your provider’s billing process for the fixed-line service?’

Participants were asked to answer on a scale of very satisfied, satisfied, neither satisfied nor dissatisfied, dissatisfied or very dissatisfied.

Only 22% of JT’s customers rated its billing as satisfactory or highly satisfactory. In contrast 53% of Sure’s customers rated its billing as satisfactory or highly satisfactory. These figures may reflect the concerns that have been reported both in the local media and to us directly. For example, in Jersey, JT has experienced problems with the introduction of its new billing system and in Guernsey Sure has introduced new billing charges, e.g. the £1 per month charge for accounts not settled by direct debit.

Customer Services

Survey participants were asked the following questions

‘Over the last 6-12 months have you had to contact customer services with regard to your fixed line service? If yes how would you describe your overall experience dealing with customer services?’

Of the 500 people surveyed in each island 240 (40%) of JT’s customers had cause to contact customer services in the past 6 – 12 months compared to 125 (25%) of Sure’s customers. Of the 240 JT customers who contacted customer services 149 (62%) found their experience either unsatisfactory or worse. Of the 125 Sure customers who contacted customer services 40 (32%) reported their experience to be either unsatisfactory or worse.

Switching providers

Survey participants were asked the following questions

'If there was an option to change your fixed-line provider to another existing Channel Islands operator, how likely would you be to change in the future? If you have answered 'very likely' or 'likely' what are your main reasons for possibly changing provider?'

Almost 6 in 10 of JT's fixed line customers said that they were either likely or very likely to change their provider when they are able to do so compared to less than 4 in 10 of Sure's fixed line customers. In both islands by far the biggest reason given for seeking to change operators was price with 44% in Jersey and 49% in Guernsey.

With so many customers indicating that they would consider changing providers this alone sends a powerful message to both operators to improve customer experience.

What are we doing about it?

We are working with operators to ensure that from 1 June 2015 customers will have a choice of fixed line provider thus enabling them to 'vote with their feet' should they choose to do so. Experience from other markets indicates that customers who have choice feel more empowered and able to influence their service provider even if they ultimately do not chose to switch.

We anticipate that telecoms service providers will seek to improve both the quality and pricing of their services to win new customers and to persuade their existing customers not to switch away from them. We also expect to see improved engagement by the service providers as they seek greater feedback from their customers and respond to that feedback.

Next steps

We will release our second report on customer satisfaction with mobile telecoms services in August and our final report on broadband services in September.

The survey will be repeated annually, with the next one scheduled for May 2015, immediately prior to the introduction of choice for fixed line telecoms customers. This will allow us to track the impact of the introduction of choice on customer satisfaction levels as well as tracking how service providers are performing in tackling the underlying issues that are causing customer dissatisfaction.