



## Customer Satisfaction Survey

### Mobile Results

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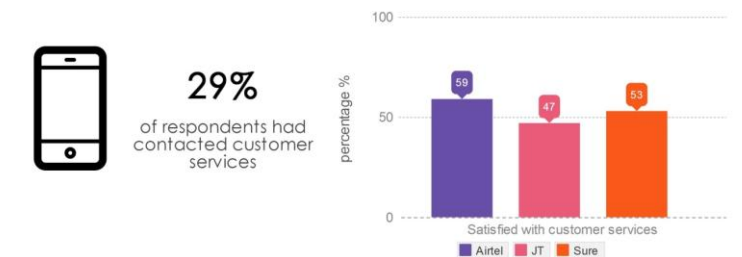
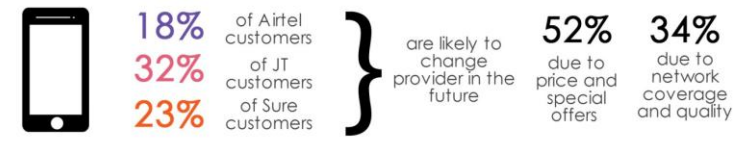
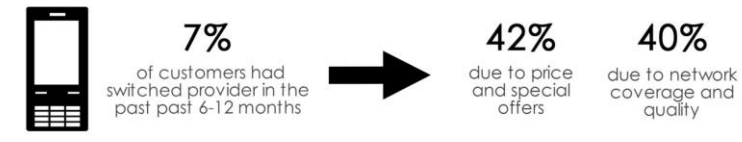
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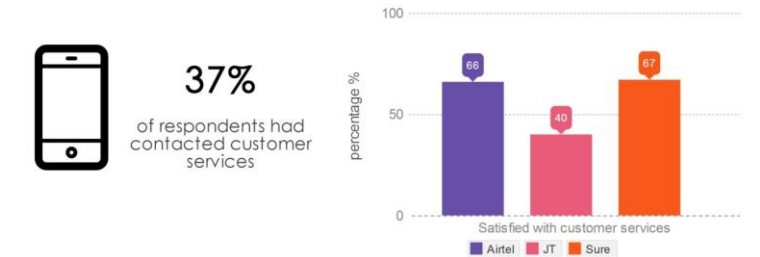
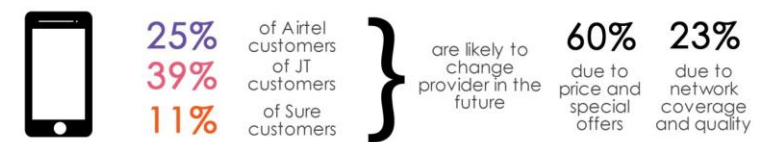
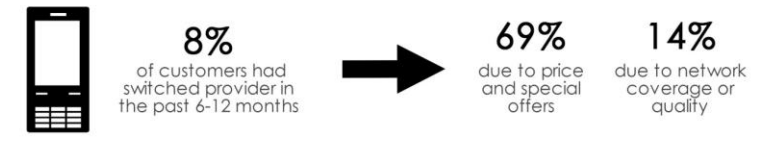
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# Telecoms Satisfaction Survey - Headline Results

## Mobile - Guernsey



## Mobile - Jersey



## Introduction

This report on customer satisfaction with mobile telecoms services is the second of the three reports on customer satisfaction that we, the Channel Islands Competition and Regulatory Authorities (CICRA), are publishing over the summer.

We expect this report to help customers make decisions about which mobile provider they choose in the future. It will also help mobile 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). In May 2014 we commissioned a survey of 500 customers<sup>1</sup> in each of Guernsey and Jersey, seeking their views in these three areas for three types of services – mobile services (which are the focus of this report) fixed lines (for which the report was issued on 30 July) and broadband (which will be the focus of the final report to be issued in September).

Consumers have a choice of mobile provider in both islands. In both Jersey and Guernsey consumers can choose between three providers - JT, Sure and Airtel. We believe that all consumers benefit from being offered a choice of provider (even if ultimately they do not switch).

We intend to repeat the customer satisfaction survey at regular intervals and publish the results to provide customers with up to date information and track any changes in customer satisfaction.

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<sup>1</sup> 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, then there was an option to carry out face-to-face interviews. In the end, 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.

## Quality of Service

Survey participants were asked the following question

**‘Overall, how satisfied are you with the quality of the mobile 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.

Overall 60% of Guernsey participants and 63% of Jersey participants rated their mobile quality of services as satisfactory or very satisfactory. Whilst these levels of satisfaction clearly show room for improvement, they are considerably higher than for fixed line services where customers do not have a choice of provider yet.

However there are significant differences in the ratings given to individual providers in each island.

In Guernsey, 82% of Airtel customers responded that they were satisfied or very satisfied with their mobile quality of service compared with 59% of Sure customers and 49% of JT customers.

In Jersey, 90% of Sure customers responded that they were satisfied or very satisfied with their mobile quality of service compared with 67% of Airtel customers and 55% of JT customers.

For customers who are unhappy with the quality of service they are receiving from their current provider, the results above may help inform a decision as to whether or not to change provider.

By way of contrast, in order to be considered a Which? Recommended mobile phone provider, a provider must receive a customer score of 70% or more for overall satisfaction and how likely they are to recommend their provider to a friend based on call coverage, internet speed, customer service, ease of contacting, value for money and incentives<sup>2</sup>.

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<sup>2</sup> <http://www.which.co.uk/technology/phones/reviews-ns/best-mobile-phone-networks/best-mobile-networks-overview/>

## Billing

Survey participants were asked the following question

**'How satisfied are you with regard to your provider's billing process for mobile?'**

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

Overall 53% of Guernsey participants and 47% of Jersey participants rated their billing as satisfactory or highly satisfactory.

There were differences in the scores achieved by individual providers in each island.

In Guernsey, Airtel received the highest score with 60% of customers responding that they were satisfied or very satisfied with their mobile billing compared with 53% of Sure customers and 51% of JT customers.

In Jersey, Sure received the highest score with 81% of customers responding that they were satisfied or very satisfied with their mobile billing compared with 77% of Airtel customers and 28% of JT customers.

The results for JT in Jersey may reflect the concerns that have been reported both in the local media and to us directly about ongoing problems with the introduction of its new billing system.

## Customer Services

Survey participants were asked the following questions:

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

37% of Jersey mobile customers had contacted customer services in the past six-12 months with 30% of customers reporting that they were either dissatisfied or very dissatisfied with their experience.

In Guernsey, 29% of mobile customers had contacted customer services with 26% of customers reporting that they were either dissatisfied or very dissatisfied with their experience.

Again there were differences in the ratings given to individual providers in each island.

In Guernsey, 59% of Airtel customers rated their experience of dealing with customer services as either satisfactory or highly satisfactory compared with 53% of Sure customers and 47% of JT customers.

In Jersey, 67% of Sure customers rated their experience of dealing with customer services as either satisfactory or highly satisfactory compared with 66% of Airtel customers and 40% of JT customers.

## Switching providers

Survey participants were asked the following questions:

**‘Over the last six-12 months, have you changed your mobile service provider?’ If yes, what were your main reasons for switching mobile provider?’**

8% of those surveyed in Jersey had changed provider in the last six-12 months with 69% indicating that pricing and special offers were the main reasons for changing. In Guernsey 7% of those surveyed had changed provider with 42% of those indicating that pricing and special offers were the main reasons for changing followed by 40% citing network coverage and quality.

Survey participants were also asked the following questions:

**‘How likely are you to change your mobile provider in the future? If you have answered ‘very likely’ or ‘likely’, what are your main reasons for possibly changing provider?’**

31% of Jersey mobile customers and 24% of Guernsey mobile customers said that they were either likely or very likely to change their provider in the future. In both islands by far the biggest reasons for seeking to change providers are pricing and special offers with 60% in Jersey and 52% in Guernsey.

In Jersey 39% of JT customers said they are likely or very likely to change provider in the future compared with 25% of Airtel customers and 11% of Sure customers.

In Guernsey 32% of JT customers said they are likely or very likely to change provider in the future compared with 23% of Sure customers and 18% of Airtel customers.

The significant number of customers indicating that they would consider changing providers, and the majority indicating that price plays an important role in their purchasing decision, sends a powerful message to providers to ensure that the products and services that they offer, both now and in the future, are designed to best meet customer needs.

## What should customers consider when thinking about switching providers?

Contract lock-ins are the one good reason for not switching provider. However if you are out of contract and free to switch here are at five good reasons to consider making a mobile move:

### **1) It could save you money**

Look around at the deals available, check your usage to make sure you are not paying for services that you do not use. Whether you're a pay-as-you-go or pay-monthly customer if you haven't switched for a while you might be surprised at how much you can shave off your monthly mobile bills.

### **2) Switching your mobile deal is easy**

### **3) Get a new mobile handset**

Is your mobile handset more antique store than app store? Whether you want the latest high-spec smartphone or simply want a handset with a battery that doesn't die within hours of charging many new mobile deals come complete with a free or subsidised handset.

### **4) All mobile providers are not equal**

Reluctance to switch is often prompted by the misconception that all mobile providers are as bad as each other. The results of our survey show that this is not always the case. By changing your provider you could save money and you may also have a better customer experience overall.

### **5) Keep your mobile phone number**

Switching to a new mobile provider doesn't mean sacrificing your mobile number.



## What are we doing about it?

We listen carefully to customers, and act in their interests where they are not receiving the service they expect and pay for. For example we received a number of complaints that mobile providers were changing the terms of fixed term mobile contracts during the fixed term period without customer agreement. In some cases they reduced the amount of data included free in a package. So we have changed mobile providers' licences so that, from 1 October this year, providers have to give customers at least two months written notice of any increase to the unit price of services and give the customer the right to terminate the contract without penalty if the proposed variations are not acceptable to them.

The media locally has reported on the issue of 'bill shock' (when people use data roaming off-island with their mobile devices which results in high charges) and we have also received a number of complaints on this issue. As the result of our work in this area two providers, Sure and JT, are voluntarily introducing caps to roaming charges so that customers can control the size of their bill. We urge Airtel to follow suit. In addition, we have made it a condition on providers seeking 4G spectrum that customers have the ability to control the cost of their mobile phone through the use of a cap.

We will continue to engage with customers and protect their interest where appropriate.

## Next steps

We expect to release the third report on broadband services in September.

The survey will be repeated annually with the next survey scheduled for May 2015. This will allow us to track changes in customer satisfaction levels over time as well as how service providers are performing in tackling any underlying issues that are causing customer dissatisfaction.