



## Customer Satisfaction Survey

### Broadband Results

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# Telecoms Satisfaction Survey - Headline Results

## Broadband - Guernsey



**1%**  
of customers said that they had switched supplier in the past 6-12 months



**36%**  
of respondents anticipated changing provider in the future



**36%** of JT customers  
**37%** of Sure customers

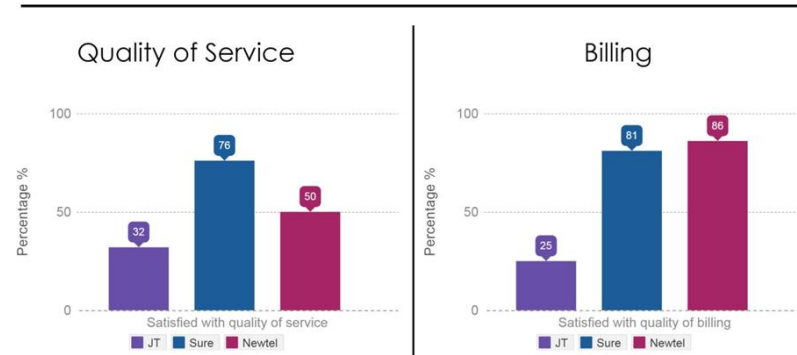


The biggest reason  
**56%**  
being speed and reliability

**48%**  
of respondents had contacted customer services



## Broadband - Jersey



**10%**  
of customers said that they had switched supplier in the past 6-12 months



**31%**  
of these customers said that the main driver was price



**45%**  
of respondents anticipated changing provider in the future

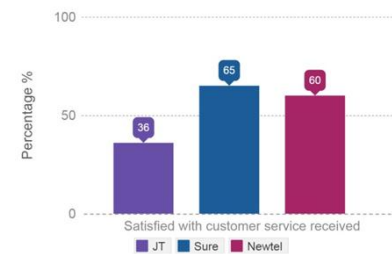


**53%** of JT customers  
**12%** of Sure customers  
**55%** of Newtel customers



The biggest reason  
**41%**  
being price and special offers

**55%**  
of respondents had contacted customer services



## Introduction

This report on broadband services is the final of three reports on customer satisfaction that we, the Channel Islands Competition and Regulatory Authorities (CICRA), have published in recent weeks.

We expect this report to help customers make decisions about which broadband service provider they choose in the future. It will help broadband providers by showing them where they may need to improve to better meet their customers' expectations and it will help us to 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> each in Jersey and Guernsey seeking their views on these areas for three types of services – broadband (which is the focus of this report), fixed lines (which was the focus of our first report published in July) and mobiles (which was the focus of our second report published in August).

Consumers have a choice of broadband provider in both islands. In Jersey broadband services are available from JT, Sure and Newtel, while in Guernsey they are available from Sure and JT<sup>2</sup>. We believe that all consumers benefit from being offered a choice of operator (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 to 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, 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.

<sup>2</sup> Airtel also offers a mobile broadband service in both islands. However the number of Airtel broadband customers surveyed was too small for the results to be included in this report.

## Quality of Service

Survey participants were asked the following question

**‘Overall, how satisfied are you with the quality of the broadband 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 only 42% of Jersey participants and 31% of Guernsey participants rated their broadband quality of service as satisfactory or very satisfactory.

However there are differences in the ratings given to individual operators in each island and particularly so in Jersey.

Sure received the highest quality of service scores in Jersey with 76% of participants responding that they were satisfied or very satisfied with the quality of service received compared with 50% of Newtel customers and 32% of JT customers.

Both JT and Sure in Guernsey received low scores with 35% of JT customers and 29% of Sure customers responding that they were satisfied or very satisfied with their broadband quality of service.

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 whether or not to change provider.

By way of contrast, in order to be considered a Which? recommended broadband provider, a provider must receive a customer score of 70% or more for overall satisfaction as well as indicate how likely they are to recommend their provider to a friend based on ease of set up, customer service, connection speed, reliability and technical support. While not directly comparable, based on the results obtained from our survey, it is only Sure in Jersey that could be considered close to ‘best buy’ standard.

## Billing

Survey participants were asked the following question

**‘How satisfied are you with regard to your provider’s billing process for broadband?’**

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

44% of Jersey broadband customers and 51% of Guernsey broadband customers rated their billing as satisfactory or highly satisfactory.

Again there were differences in the ratings achieved by individual operators in each island.

JT was rated highest in Guernsey with 66% of participants recording that they were satisfied or very satisfied with their provider’s billing process compared with 48% of Sure customers.

Newtel was rated highest in Jersey with 86% of participants recording that they were satisfied or very satisfied with their provider’s billing process compared with 81% of Sure customers and just 25% of JT customers.

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

## Customer Services

Survey participants were asked the following questions

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

55% of Jersey broadband customers had contacted customer services in the past six–12 months with 41% reporting they were either dissatisfied or very dissatisfied with their experience.

In Guernsey 48% of broadband customers had contacted customer services and 33% reported dissatisfaction (or worse) with their experience.

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

46% of Sure customers in Guernsey rated their experience of dealing with customer services as either satisfactory or very satisfactory compared with 39% of JT customers.

65% of Sure customers in Jersey rated their experience of dealing with customer services as either satisfactory or very satisfactory compared with 60% of Newtel customers and 36% of JT customers.

## Switching provider

Survey participants were asked the following question

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

10% of those surveyed in Jersey had changed provider in the last six-12 months with 40% indicating that price or offers from other providers was the main reasons for changing. In Guernsey only 1% of respondents had changed provider.

Survey participants were also asked the following question

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

Just under a half (45%) of Jersey broadband customers said that they were either likely or very likely to change their provider in the future compared with just over a third (36%) of Guernsey broadband customers.

In Jersey the most often cited reason for seeking to change was price or offers from other providers (41%) followed by broadband speed and reliability (39%). In Guernsey the most often cited reason for seeking to change was broadband speed and reliability (56%) following by price or offers from other providers (34%).

The fact that so many customers indicated they would consider changing providers sends a powerful message to the operators to improve customer experience.

## What can consumers do to improve their broadband experience?

There are many factors that can have an adverse impact on the speed of your connection; a problem with your service provider's network itself is only one. If you feel that you are not getting the broadband speed that you are subscribing to you should first use a speed test to measure how your connection is performing. You can compare this to the service speed to which you have subscribed.

Here are some tips for improving your broadband experience

- 1) UPDATE your web browser or try a new one
- 2) LIMIT the number of devices in your home – the more devices you have online at once the more likely they are to slow each other down
- 3) PLUG IN using an Ethernet cable as wireless connections can be up to 30% slower than wired connections
- 4) CONSIDER timing periods of heavy usage (like downloading movies) for less busy periods, for example overnight.
- 5) SECURE your wireless network so you are not unknowingly sharing your connection with others
- 6) SCAN your computer for viruses and keep your anti-virus software up to date
- 7) CHECK your router - it can be affected by interference from other household items such as TVs, cordless phones, baby monitors and microwaves.  
Ideally your router should have a clear space of at least a metre round it
- 8) LIMIT the number of applications that automatically start running when you log on - these can slow down your connection without you even realising they are running
- 9) TRY A NEW DEVICE - Many devices have capped Wi-Fi speed limits and older devices may struggle to deliver faster broadband services. Borrow a device from a friend, log it onto your wireless network and see if your experience improves

If, after trying these tips you do not experience faster Broadband contact your broadband provider for more help.



## What are we doing about it?

In February 2014, in partnership with Guernsey Commerce and Employment Department, we began a pilot 'proof of concept' study into broadband quality. The pilot involved 20 residential connections in Guernsey that were continuously assessed (with the user's prior knowledge and consent) over a three month period. The pilot study is now complete and, while not statistically significant, the results show that a larger study would be useful. We are therefore planning to commission a further study across both Jersey and Guernsey and we expected to publish the results next year.

We expect the results of the study to provide independent and robust information confirming the areas of each island where customers generally receive a good quality of service and those areas where the customer experience is not as good. Most importantly it will indicate why the quality of service is less than ideal. These could include issues with the broadband provider's network and also issues with the customer's own equipment including the router, internal wiring or Wi-Fi network.

We will be working with operators to identify a statistically significant sample of customers, to run the tests and then to resolve any issues identified.

## Next steps

Feedback from operators and consumers to the first two reports, on fixed line and mobile customer satisfaction, has been very positive. As a result we will repeat the survey in November 2014 and every six months thereafter. This is earlier and more frequent than our original intention to repeat the survey annually. This will allow us to track changes in customer satisfaction levels over time as well as tracking how service providers are performing in tackling the underlying issues that are causing customer dissatisfaction.

We want to take this opportunity to thank all who have participated in the questionnaire. We would like to encourage consumers to participate in the next survey in November.