Customer Satisfaction Survey

Mobile Results

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Telecoms Satisfaction Survey - Headline Results

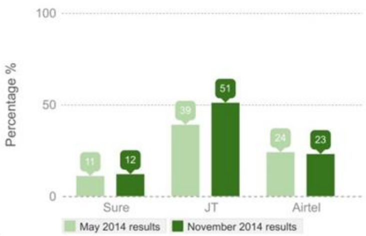
Mobile - Jersey

Quality of Service

Billing

Changed service provider

Likely/very likely to change provider



The main driver for both continued to be price

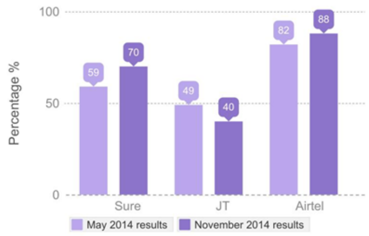
Satisfaction with provider's customer service

35% of Sure customers
46% of JT customers
48% of Airtel customers

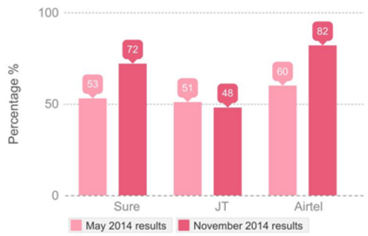
had cause to contact customer services

Mobile - Guernsey

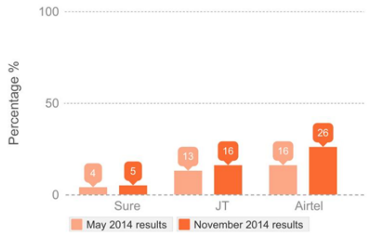
Quality of Service



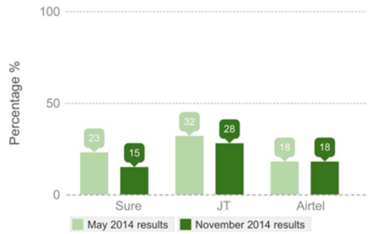
Billing



Changed service provider



Likely/very likely to change provider

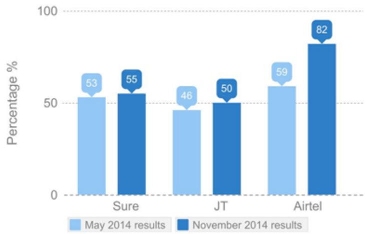


The main driver for both continued to be price

Satisfaction with provider's customer service

24% of Sure customers
64% of JT customers
56% of Airtel customers

had cause to contact customer services



Introduction

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

We expect this report to help:

- customers make decisions about which mobile provider they choose in the future
- mobile telecoms service providers by showing where they may need to improve to better meet their customers' expectations
- CICRA identify the most important issues for customers which will, in turn, inform our future work in the telecoms sector

Based on feedback received from our May 2014 survey we decided to repeat the survey every six months so we can track changes in customer satisfaction over time and effectively track how responsive the providers are to the customer feedback. In November 2014 we commissioned our second survey of 500 customers[1] again focussing on the areas in which we know customers are particularly interested: quality of service, billing and issue resolution (through customer services). The survey was conducted in Jersey and Guernsey seeking customers views on these three areas for three types of services – mobile services (which are the focus of this report), fixed line telecoms services (for which the report was issued on 16 January 2015, and broadband (which will be the focus of the final report to be issued shortly).

Channel Islands customers have a choice of mobile provider. In both Jersey and Guernsey mobile services are available from JT, Sure and Airtel. We believe that all customers benefit from being offered a choice of provider even if ultimately they do not switch.

The Channel Islands Competition and Regulatory Authorities or 'CICRA' is the name given to the Jersey Competition Regulatory Authority and the Guernsey Competition and Regulatory Authority. In Jersey, we are responsible for regulating the telecoms, postal and electricity sectors along with administering and enforcing competition law. In Guernsey we are responsible for regulating the telecoms, postal and electricity sectors along with administering and enforcing competition law. Our aim is to ensure that consumers receive the best value, choice and access to high quality services in addition to promoting competition and consumers' interests.

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[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.

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.

68% of Guernsey participants and 57% of Jersey participants rated their mobile quality of services as satisfactory or very satisfactory compared to 60% and 63% respectively in May. However there are significant differences in the ratings achieved by individual providers in each island.

In Guernsey 88% of Airtel customers who responded indicated that they were satisfied or very satisfied with their mobile quality of service compared with 70% of Sure customers and 40% of JT customers. Results for Airtel and Sure have improved since May 2014 when they achieved ratings of 82% and 59%, respectively, but have declined for JT which fell from 49% in May. The gap in customer satisfaction levels is widening between the high ratings achieved by Airtel and Sure and the low rating achieved by JT.

In Jersey 78% of both Sure's and Airtel's customers who responded indicated that they were satisfied or very satisfied with their mobile quality of service compared with 40% of JT's customers. The May results from Sure, Airtel and JT were 90%, 67% and 55% respectively. While Sure's results have decreased, its high rating is still on a par with that of Airtel. Again the gap between high ratings achieved by Sure and Airtel and the low rating achieved by JT is widening.

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[2]
- 93% of all adults with mobile devices surveyed in the UK were satisfied with their overall mobile service in quarter 1, 2014[3]

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 and which services customers consider most often to deliver a better quality of service.

[2] http://www.which.co.uk/technology/phones/reviews-ns/best-mobile-phone-networks/best-mobile-networks-overview/
[3] Ofcom The Communications Market Report published 7 August 2014

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.

70% of Guernsey participants and 50% of Jersey participants rated their billing as satisfactory or highly satisfactory. While satisfaction levels in Guernsey have improved significantly from 53% in May, results in Jersey have only marginally improved from 47% in May.

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

In Guernsey Airtel achieved the highest rating with 82% of customers who responded indicating that they were satisfied or very satisfied with their mobile billing compared with 72% of Sure customers and 48% of JT customers. Both Airtel and Sure have achieved significantly high ratings in November than in May when their ratings were 60% and 53% respectively. The rating achieved by JT has fallen slightly from 51% in May.

In Jersey Sure received the highest score, with 80% of customers responding that they were satisfied or very satisfied with their mobile billing, compared with 78% of Airtel customers and 27% of JT customers. For all operators the results were broadly consistent with the results in May.

In both islands there is a significant gap between the higher ratings achieved by Sure and Airtel and the lower rating achieved by JT. In Jersey the gap between the better performing operators and the worst performing operator is widening.

These figures may reflect the continued concerns that have been reported both in the local media, and to CICRA directly, following the introduction of JT's new billing system. Although JT has reported that it is working with customers to address concerns with its billing system its efforts in this area do not seem to be reflecting positively in the customer satisfaction ratings.

Customer Services

Survey participants were asked the following questions:

'Over the last six to 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?'

43% of Jersey mobile customers who responded had contacted customer services in the past six-12 months with 45% of those customers reporting that they were either satisfied or highly satisfied with their experience compared to 49% in May.

In Guernsey 32% of mobile customers had contacted customer services with 59% of those customers reporting that they were either satisfied or highly satisfied with their experience compared to 53% in May.

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

In Guernsey 82% of Airtel customers who responded rated their experience of dealing with customer services as either satisfactory or highly satisfactory compared with 55% of Sure customers and 50% of JT customers - the May results being 59%, 53% and 46% respectively. The results indicate that customers feel that Airtel's customer services has improved significantly since May and there has also been a slight improvement in the ratings achieved by Sure and JT over the same period.

In Jersey 74% of Airtel customers who responded rated their experience of dealing with customer services as either satisfactory or highly satisfactory compared with 73% of Sure customers and 26% of JT customers – the May results being 66%, 67% and 40% respectively. The results indicate that customers feel that Sure and Airtel's customer services are on a par with each other and both have improved since May. However the customer satisfaction rating achieved by JT has fallen significantly and is now only a third of that of its competitors.

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?’

13% of those surveyed in Jersey had changed provider in the last six-12 months with 52% indicating that pricing and special offers were the main reasons for changing followed by 27% citing network coverage and quality. In Guernsey 8% of those surveyed had changed provider with 48% of those indicating that pricing and special offers were the main reasons for changing followed by 31% 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?’

35% of Jersey mobile customers and 16% of Guernsey mobile customers said that they were either likely or very likely to change their provider in the future. In both islands the most often cited reason for seeking to change providers were pricing and special offers with 48% in Jersey and 49% in Guernsey.

In Jersey 51% of JT customers who responded said they are likely or very likely to change provider in the future compared with 23% of Airtel customers and 12% of Sure customers. In May the ratings were 39%, 24% and 11% respectively. Not only are more JT customers likely or very likely to change provider, than those with other operators, this number is increasing.

In Guernsey 28% of JT customers said they are likely or very likely to change provider in the future compared with 18% of Airtel customers and 15% of Sure customers. In May the ratings were 32%, 18% and 23% respectively.

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 and 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

Visit your chosen provider's website for more information, call for more details or visit their shop.

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 will continue to engage with consumers so that they have the information they need to make an informed choice of mobile service provider.

We have asked JT to put together an action plan, to share with us and customers, setting out the steps it will take to improve customer satisfaction levels and we have asked Sure to share with us its customer services plans .

Next steps

We expect to release the third report on broadband services shortly.

The surveys into fixed lines, mobile and broadband services will be repeated biannually 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.