



Customer Satisfaction Survey

Broadband Results

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*Guernsey Competition and Regulatory Authority
Suites B1 & B2, Hirzel Court,
St Peter Port, Guernsey, GY1 2NH
Tel: +44 (0)1481 711120
Web: www.cicra.gg*

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*Jersey Competition Regulatory Authority
2nd Floor Salisbury House,
1-9 Union Street, St Helier, Jersey, JE2 3RF
Tel: +44 (0)1534 514990
Web: www.cicra.je*

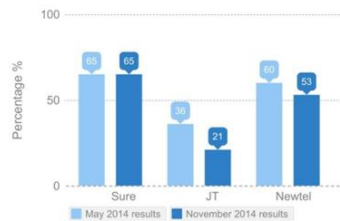
Telecoms Satisfaction Survey - Headline Results

Broadband - Jersey

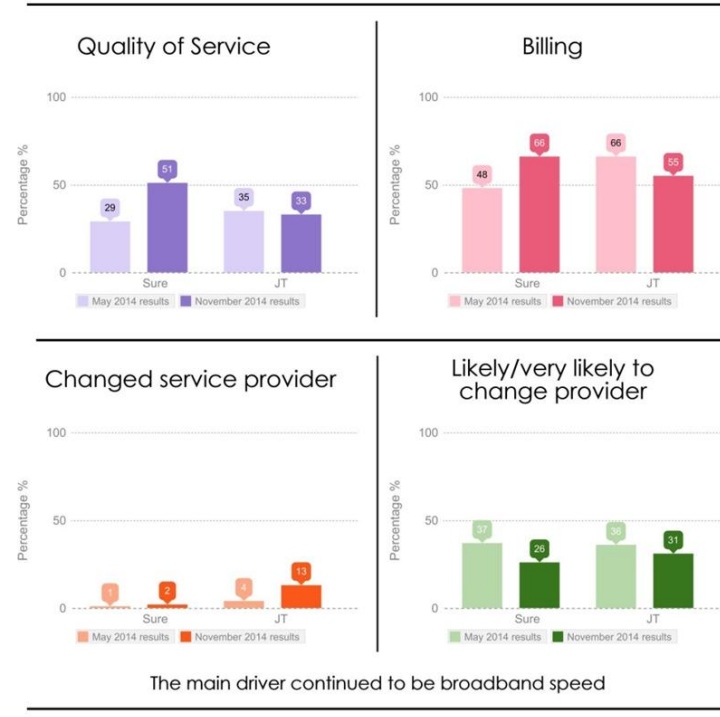


Satisfaction with provider's customer service

55% of Sure customers had cause to contact customer services as did **66%** of JT customers and **61%** of Newtel customers



Broadband - Guernsey



Satisfaction with provider's customer service

60% of Sure customers had cause to contact customer services as did **56%** of JT customers



Introduction

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

We expect this report to help

- customers make decisions about which broadband service provider they choose in the future
- broadband providers by showing them where they may need to improve to better meet their customers' expectations
- CICRA to 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. So in November 2014 we commissioned a second survey of 500 customers¹ again focussing on the areas we know that customers are particularly interested in: 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 – broadband (which is the focus of this report) fixed line telecoms services (which was the focus of our first report published on 16 January) and mobiles (which was the focus of our second report published on 23 January).

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

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 and postal 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.

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 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 42% of Jersey participants and 50% of Guernsey participants rated their broadband quality of service as satisfactory or very satisfactory compared to 43% and 31% respectively in May. There are significant differences in the ratings achieved by individual providers.

In Jersey Sure received the highest quality of service ratings with 77% of customers who participated indicating that they were satisfied or very satisfied with the quality of service received compared with 46% of Newtel customers and 27% of JT customers. The ratings achieved by Newtel and JT, which were already low in comparison to Sure, have fallen slightly from 50% and 32% respectively in May - widening the gap between who customers consider to be the best and worst performing providers.

In Guernsey Sure received the highest quality of service score with 51% of customers who participated indicating that they were satisfied or very satisfied with their broadband quality of service compared with 33% of JT customers. Results for May were 29% and 35% respectively. Even though Sure’s rating is substantially higher than that achieved by JT there is still significant room for improvement on the part of both operators.

By way of contrast:

- in order to be considered a Which?-recommended broadband provider, a provider must receive a customer score of 75% or more for overall satisfaction as well as indicate how likely they are to recommend their provider to a friend².
- 88% of all adults with fixed lines broadband in the UK were satisfied with their overall broadband service in quarter 1, 2014³

For customers, who are unhappy with the quality of service they are receiving from their current provider, the survey results may help inform a decision as to whether or not to change provider and identify the provider that is considered by customers to deliver a better quality of service most often.

² <http://www.which.co.uk/technology/computing/guides/which-recommended-broadband-provider/>

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 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 who responded and 66% of Guernsey broadband customers who responded rated their billing as satisfactory or highly satisfactory. Ratings in May were 43% and 51% respectively.

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

In Guernsey Sure was rated highest with 66% of customers who responded indicating that they were satisfied or very satisfied with their provider’s billing process compared with 55% of JT’s customers. This compares to 48% and 66% respectively in May.

In Jersey Sure’s rating was consistent with that achieved in May at 82% and is similar to the 80% rating achieved by Newtel (down from 86% in May). Both compare favourably to JT’s poor rating of 22% (down from 25% in May).

While JT’s satisfaction rating for billing is significantly higher in Guernsey than in Jersey, the reduction in the figures for Guernsey between May and November gives cause for concern. The poor customer satisfaction with billing figures achieved by JT may reflect the continued concerns that have been reported both in the local media, and to us directly, following the introduction of its new billing system. Although JT has reported that it is working with customers to address concerns its efforts in this area do not seem to be reflected positively in the customer satisfaction ratings achieved.

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?’

63% of Jersey broadband customers who responded had contacted customer services in the past six–12 months with 34% reporting they were either satisfied or highly satisfied with their experience (compared to 44% in May).

In Guernsey 59% of broadband customers who responded had contacted customer services in the past six-12 months with 58% reporting they were either satisfied or highly satisfied with their experience (compared to 45% in May).

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

In Guernsey 60% of Sure customers who responded rated their experience of dealing with customer services as either satisfactory or very satisfactory compared with 45% of JT customers. Ratings for both operators have improved since May when they scored 47% and 38% respectively. There is still room for improvement by both operators but particularly so for JT.

In Jersey 65% of Sure customers who responded rated their experience of dealing with customer services as either satisfactory or very satisfactory compared with 53% of Newtel customers and 21% of JT customers. Sure’s rating is consistent with that achieved in May 2014. Newtel’s rating has decreased from 60% and JT’s rating has decreased from 36% achieved in May. There is room for improvement by all three operators but particularly so for JT whose rating was only a third of that achieved by Sure.

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?’

13% of those surveyed in Jersey had changed provider in the last six-12 months with 39% indicating that price or offers from other providers was the main reasons for changing and the same percentage indicating that speed and reliability were their main considerations. In Guernsey only 3% 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?’

48% of Jersey broadband customers who responded indicated that they were either likely or very likely to change their provider in the future compared with 27% of Guernsey broadband customers. In May the ratings achieved were 45% and 36% respectively.

The differences in the ratings achieved by individual operators were particularly striking in Jersey.

In Jersey only 14% of Sure customers who responded indicated that they were likely or very likely to change provider in the future. This compares to 26% of Newtel customers and 63% of JT customers. Sure’s rating has remained broadly consistent with the May survey (12%), Newtel’s rating halved since May (55%) but more of JT’s customers indicated that they were likely to change in the future compared to May (53%).

In Guernsey 26% of Sure customers who responded indicated that they were likely or very likely to change provider in the future compared to 31% of JT customers. In May Sure’s rating was 37% and JT’s rating was 36%.

The most often cited reasons for seeking to change in both islands was broadband speed and reliability (Jersey - 39%, Guernsey – 38%) and pricing or offers from other providers (Jersey 39% and Guernsey 24%).

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 service for more help.

What are we doing about it?

CICRA is in the process of finalising the scope of a study into residential broadband in Jersey and Guernsey which will start by the end of the first quarter this year.

The study will build on a pilot study which was carried out in 2014 and involved 20 residential connections in Guernsey that were continuously assessed (with the user's prior knowledge and consent) over a three month period.

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

We expect the results of the study to provide independent and robust information confirming the areas in 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 the customer's own equipment including the router, internal wiring or Wi-Fi network.

Next steps

The survey 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.

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