



Customer Satisfaction Survey

Broadband Results

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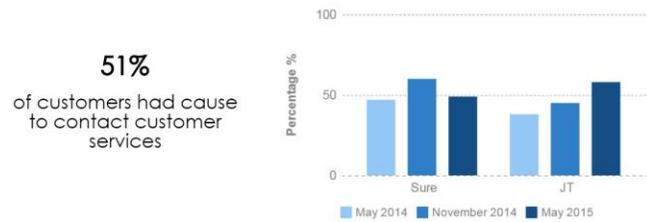
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Telecoms Satisfaction Survey - Headline Results

Broadband - Guernsey



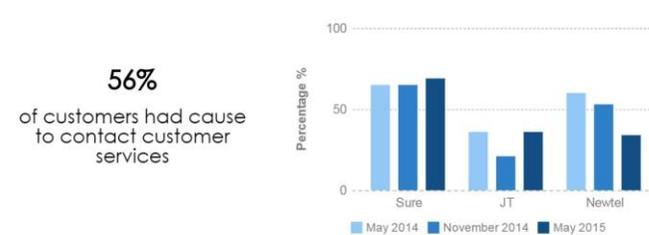
Satisfaction with provider's customer service



Broadband - Jersey



Satisfaction with provider's customer service



Introduction

This report on customer satisfaction with 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 subscribe to and which provider they choose in the future
- broadband providers by showing where they may need to improve to better meet their customers' expectations
- us to identify the most important issues for customers which will, in turn, inform our future work in the telecoms sector.

We carry out this survey every six months so we can track changes in customer satisfaction over time and see how responsive the provider are to customer feedback. In May 2015 we commissioned our third 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 1 July 2015) and mobiles (which was the focus of our second report published on 24 July 2015). Further details of our methodology can be found on our website www.cicra.je.

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 Global Research (part of the BWCI Group) undertook the survey using primarily online survey methodology with the proviso that, if the sample achieved did not truly provide 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

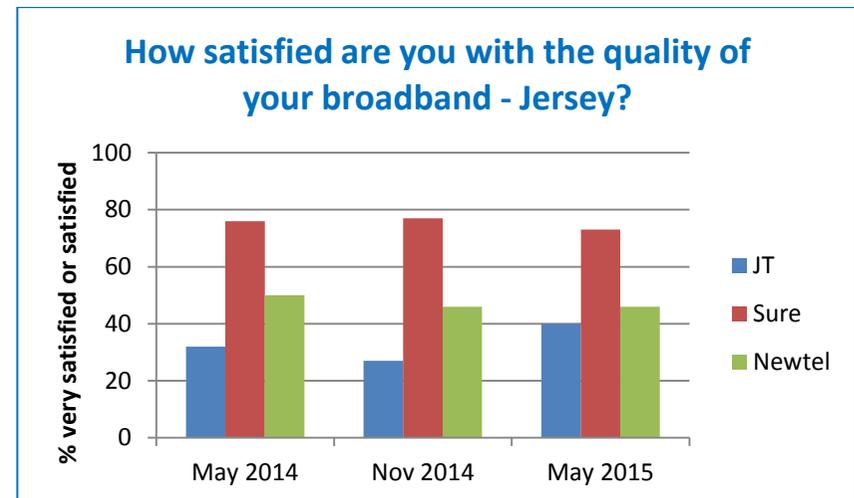
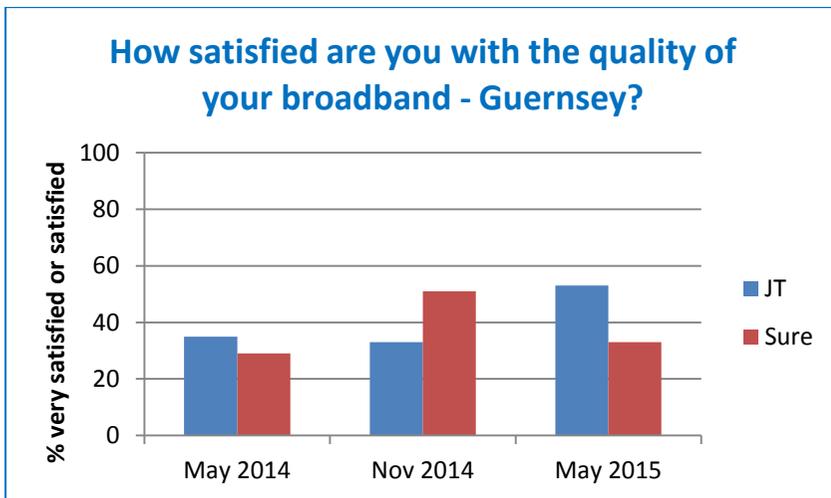
‘Overall, how satisfied are you with the quality of the broadband service you receive from your provider?’

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

Overall 48% of Jersey participants and 38% of Guernsey participants rated their broadband quality of service as satisfactory or very satisfactory compared to 42% and 50% respectively in November. There are significant differences in the ratings achieved by individual providers.

In Jersey, Sure received the highest quality of service ratings with 73% of participants indicating that they were satisfied or very satisfied with the quality of service received compared with 46% of Newtel and 40% of JT participants. Results from November were Sure 77 %, Newtel 46% and JT 27%.

In Guernsey, JT received the highest quality of service score with 53% of participants indicating that they were satisfied or very satisfied with their broadband quality of service compared with 33% of Sure participants. Results for November were 33% and 51%, respectively.



Billing

Survey participants were asked the following question

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

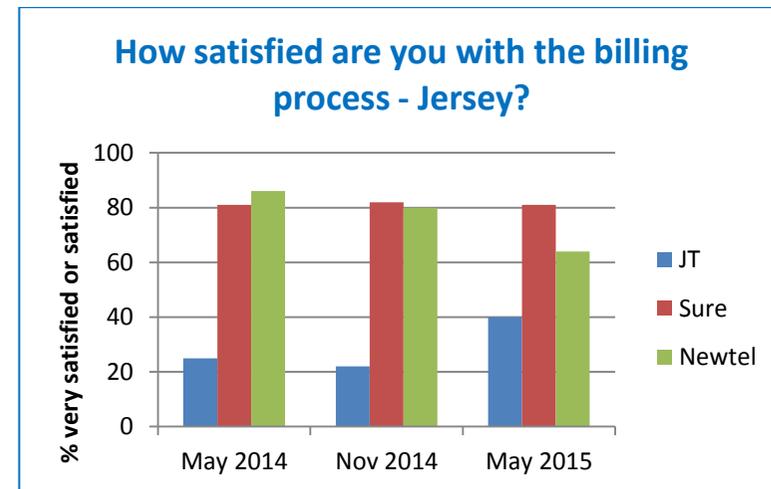
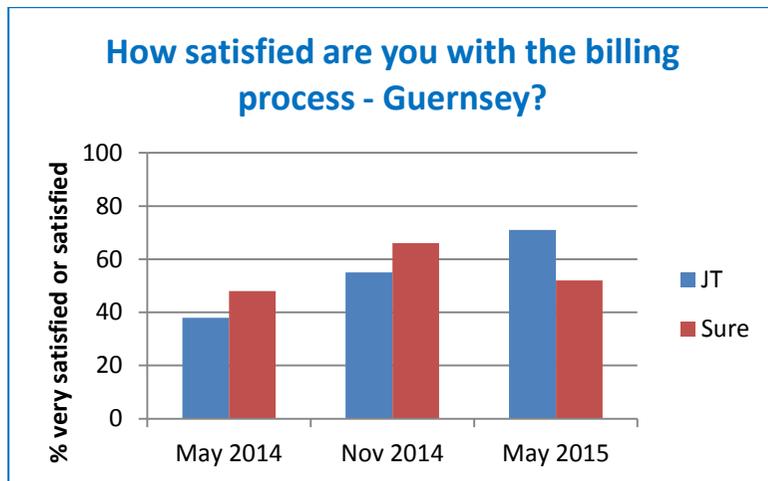
Participants were asked to answer on a scale of very satisfied, satisfied, neither satisfied nor dissatisfied, dissatisfied or very dissatisfied.

52% of Jersey participants and 57% of Guernsey participants rated their billing as satisfactory or highly satisfactory. Ratings in November were 44% and 66% respectively.

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

In Guernsey JT was rated highest with 71% of participants indicating that they were satisfied or very satisfied with their provider's billing process compared with 52% of Sure participants. This compares to 55% and 66% respectively in November.

In Jersey Sure was rated highest with 81% of participants indicating that they were satisfied or very satisfied with their provider's billing process compared with 64% of Newtel participants and 40% of JT participants. This compares to 82%, 80% and 22%, respectively, in November.



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?’

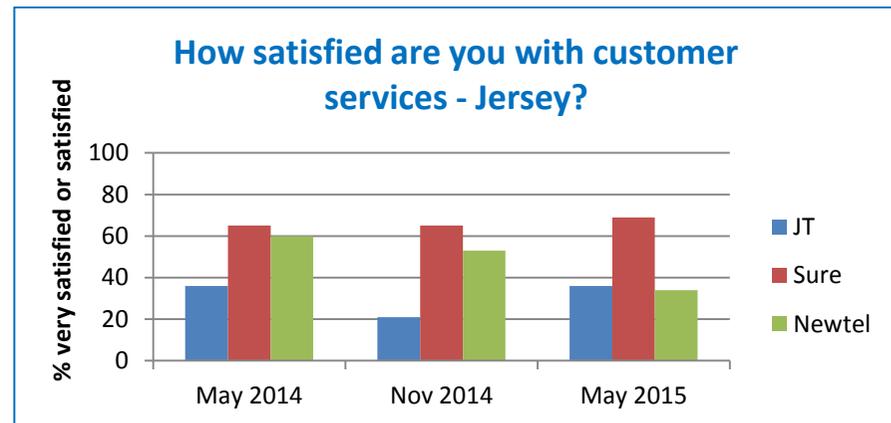
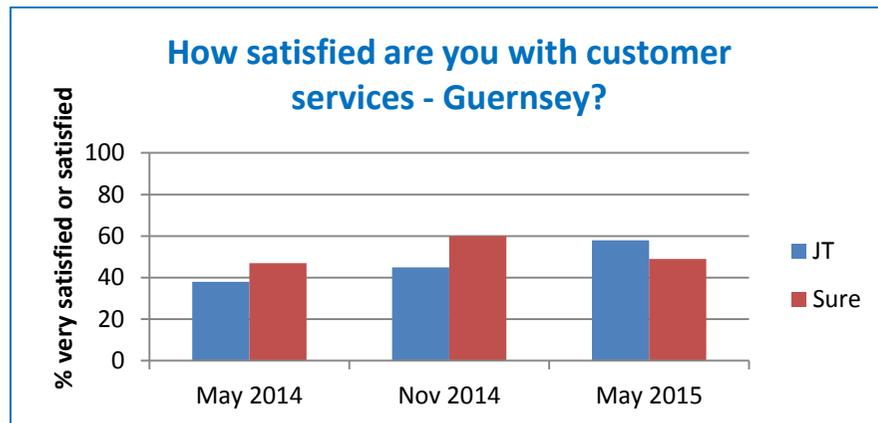
56% of Jersey participants had contacted customer services with 44% reporting they were either satisfied or highly satisfied with their experience (compared to 34% in November).

In Guernsey 51% of participants had contacted customer services with 50% reporting they were either satisfied or highly satisfied with their experience (compared to 58% in November).

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

In Guernsey 58% of JT participants rated their customer services experience as either satisfactory or very satisfactory compared with 49% of Sure participants. November ratings were 45% and 60%, respectively.

In Jersey 69% of Sure participants rated their customer services experience as either satisfactory or very satisfactory compared with 36% of JT participants and 34% of Newtel participants. Ratings for operators in November were 65%, 21% and 53%, respectively.



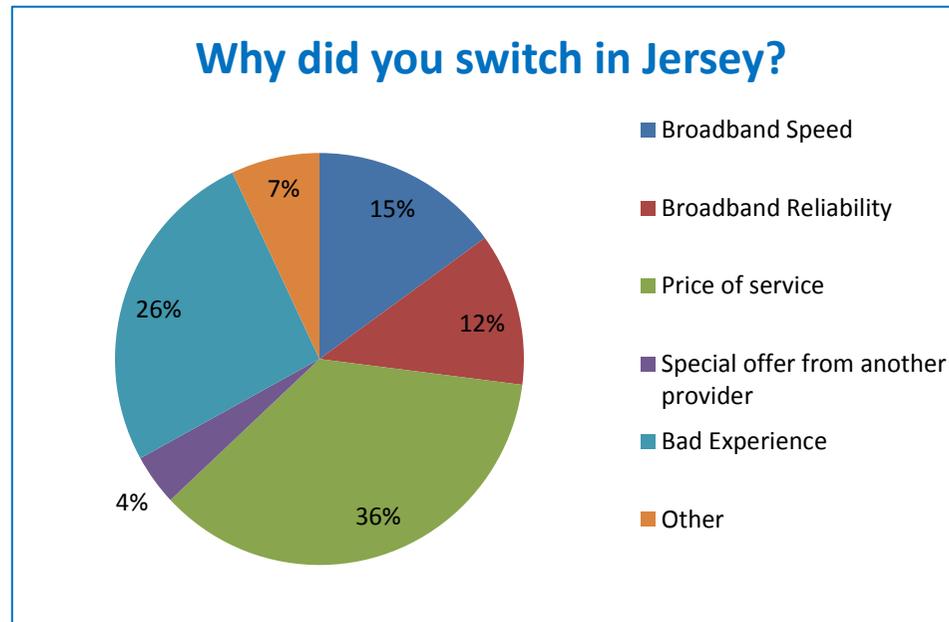
Switching provider

Survey participants were asked the following questions

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

9% of those surveyed in Jersey had changed provider in the last six-12 months with 40% indicating that price or offers from other providers were the main reasons for changing and 27% indicating that speed and reliability were their main considerations.

In Guernsey only 2% of respondents had changed provider.



Switching providers (cont.)

Survey participants were also asked the following questions

‘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?’

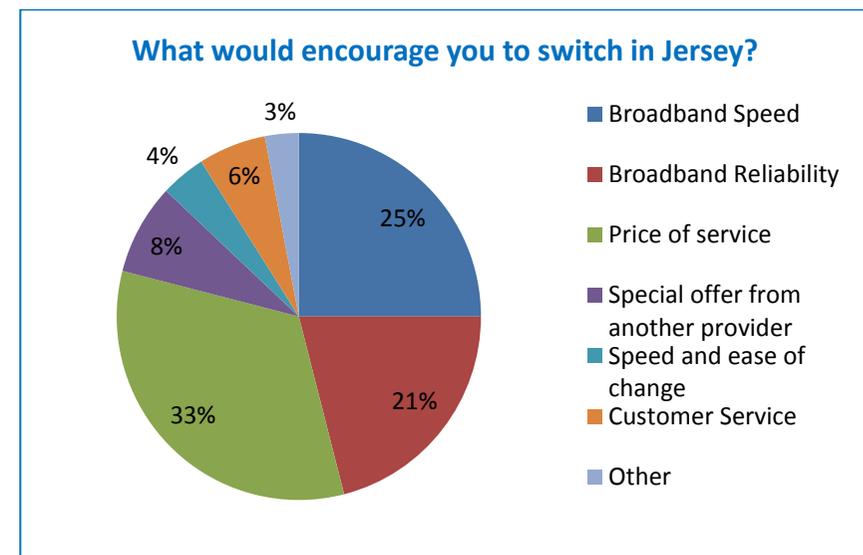
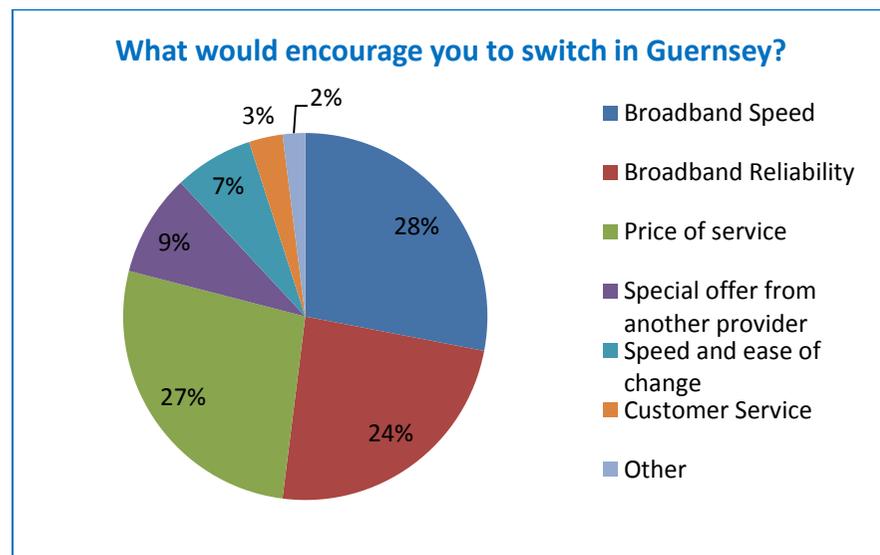
34% of Jersey participants indicated that they were either likely or very likely to change their provider in the future compared with 26 % of Guernsey participants. In November the ratings were 48% and 27%, respectively.

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

In Jersey only 16% of Sure participants indicated that they were likely or very likely to change provider in the future. This compares to 40% of JT participants and 38% of Newtel participants. Ratings for November were 14%, 63% and 26%, respectively.

In Guernsey 26% of Sure participants and 27% of JT participants indicated that they were likely or very likely to change provider in the future. Ratings for November were 26% and 31%, respectively.

The most often cited reasons for seeking to change in both islands was broadband speed and reliability (Jersey 46%, Guernsey 52%) and pricing or offers from other providers (Jersey 41% and Guernsey 36%).



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. – overnight, for example
- 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 provider for more help.

What are we doing about it?

We are currently undertaking a study into residential broadband in Jersey and Guernsey. The study, which started earlier this year, is continuously assessing the residential broadband connections in 1000 Channel Island homes (with the user's prior knowledge and consent) over a two month period.

The results of 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.

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 needs improving. 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.

We expect to be able to publish results of the study later this year.

Next steps

The survey will be repeated biannually with the next survey scheduled for November 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 causing customer dissatisfaction including those areas highlighted through our study of residential broadband.

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 November.