



## Customer Satisfaction Survey

### Mobile Results

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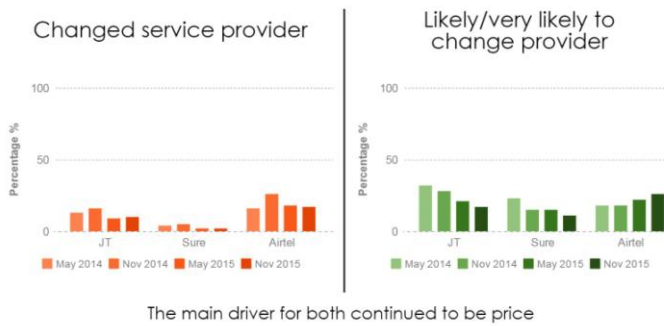
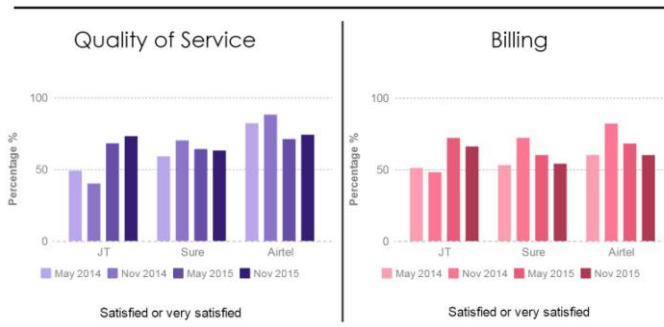
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# Telecoms Satisfaction Survey - Headline Results

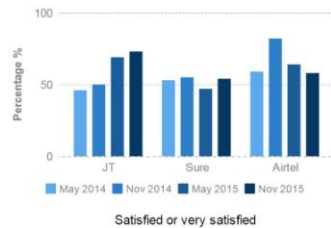
## Mobile - Guernsey



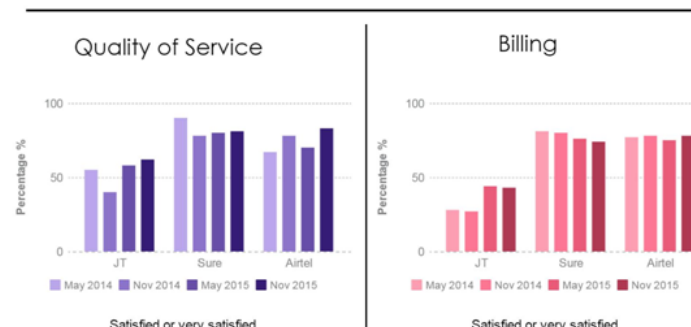
The main driver for both continued to be price

### Satisfaction with provider's customer service

**31%**  
of customers had  
cause to contact  
customer services



## Mobile - Jersey



The main driver for both continued to be price

### Satisfaction with provider's customer service

**40%**  
of customers had  
cause to contact  
customer services



## Introduction

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

We expect this report to help

- customers make decisions about which mobile provider they subscribe to and which provider they choose in the future
- mobile telecoms service 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 providers are to customer feedback. In November 2015 we commissioned our fourth survey of c.1,000 customers across the Channel Islands<sup>1</sup> again focussing on the areas we know 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 – mobile services, which are the focus of this report, fixed line services, the report for which was published on 1 March 2016 and broadband services which will be published shortly. Further details of our methodology can be found on our website [www.cicra.je](http://www.cicra.je).

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.

CICRA is the name given to the Jersey Competition Regulatory Authority and the Guernsey Competition and Regulatory Authority. 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. In Jersey, we are responsible for regulating the telecoms, postal and ports 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.

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<sup>1</sup> 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 c. 500 in each island was achieved. The survey and the sample response were also robust in terms of quality and depth of response.

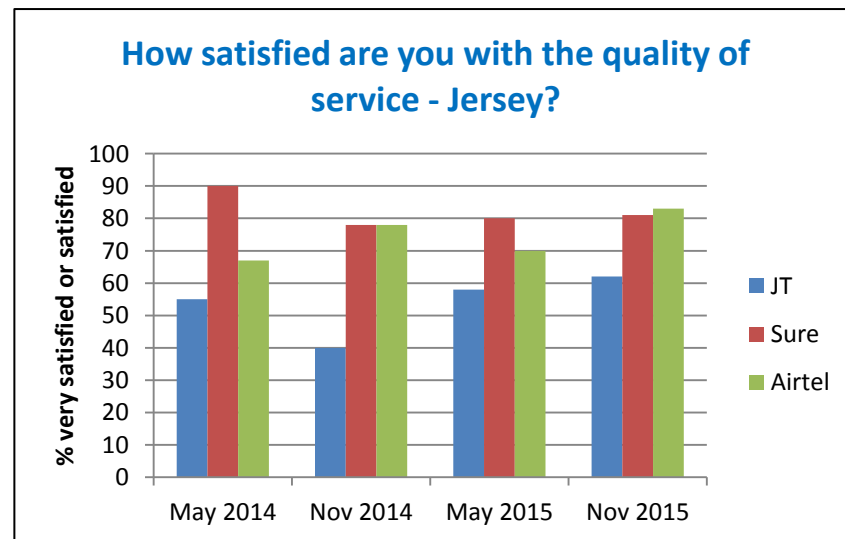
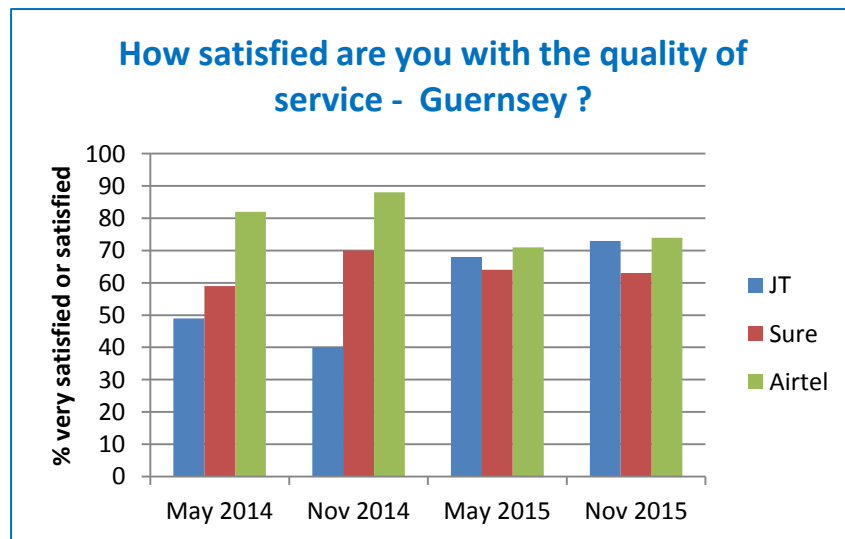
## Quality of Service

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, since CICRA’s first survey, customer satisfaction with the quality of mobile service has increased across the Channel Islands with ratings in Guernsey and Jersey in November 2015 of 66% and 69% compared to 60% and 63% respectively in May 2014.

Over the course of the four surveys previously poorer performing operators have shown significant improvements and in general there is smaller difference between the best and worst performing operators.



# Billing

Survey participants were asked the following question

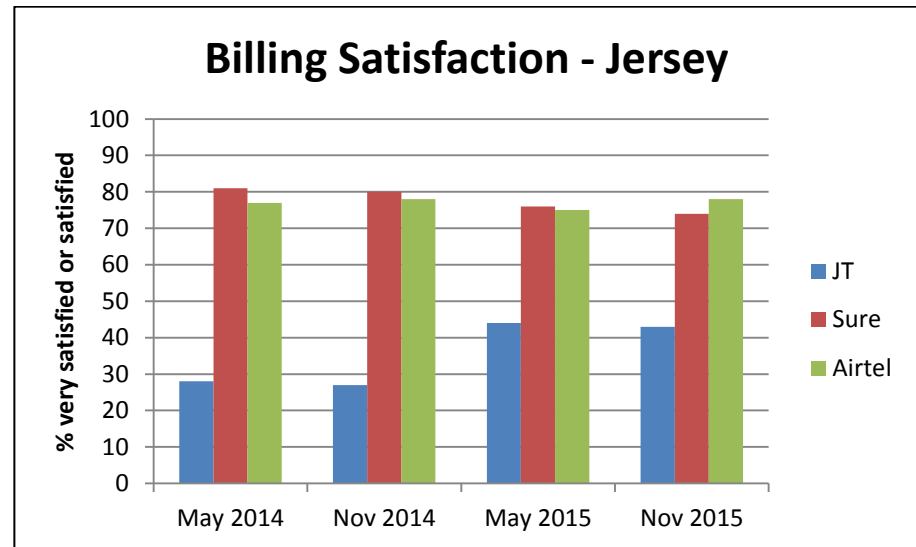
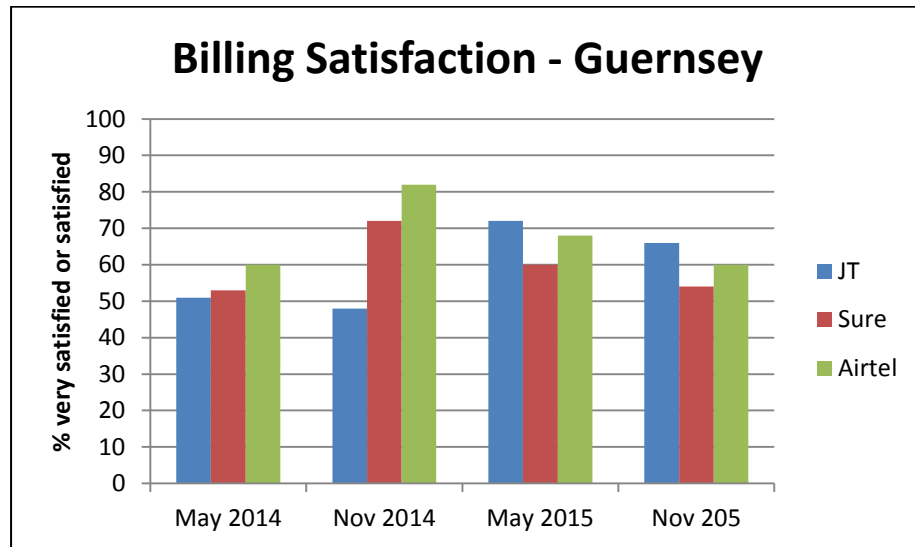
**‘How satisfied are you with regard to your provider’s billing process for mobile?’**

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

Since CICRA’s first survey, the trend in customer satisfaction with mobile provider billing processes has been different between the two islands. Guernsey mobile operator ratings, while relatively high, have not maintained higher levels previously seen and the trend appears to be downwards. In Jersey, customer perception of entrant billing processes has been fairly consistent over time and relatively higher than in Guernsey.

In Guernsey there is therefore room for operators to make further improvements given higher scores have been achieved in the past.

In Jersey JT’s rating has improved but still lags significantly behind the levels achieved by Sure and Airtel who have consistently maintained high ratings.



# Customer Services

Survey participants were asked the following questions:

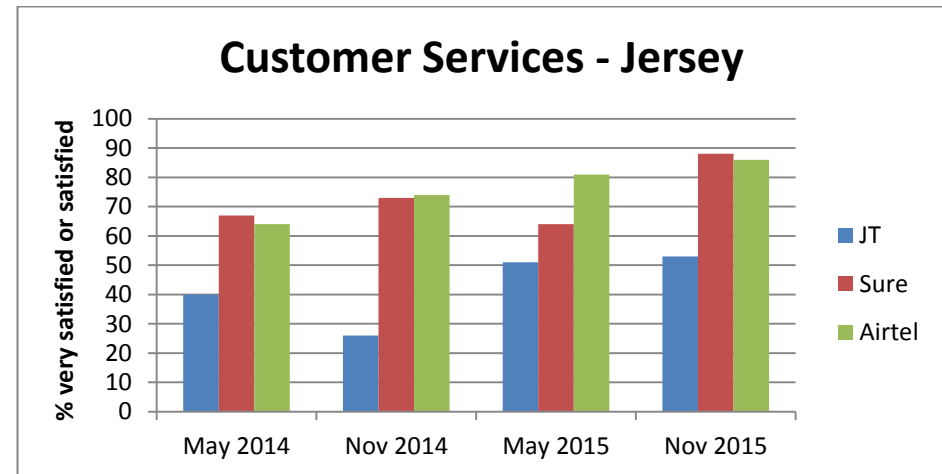
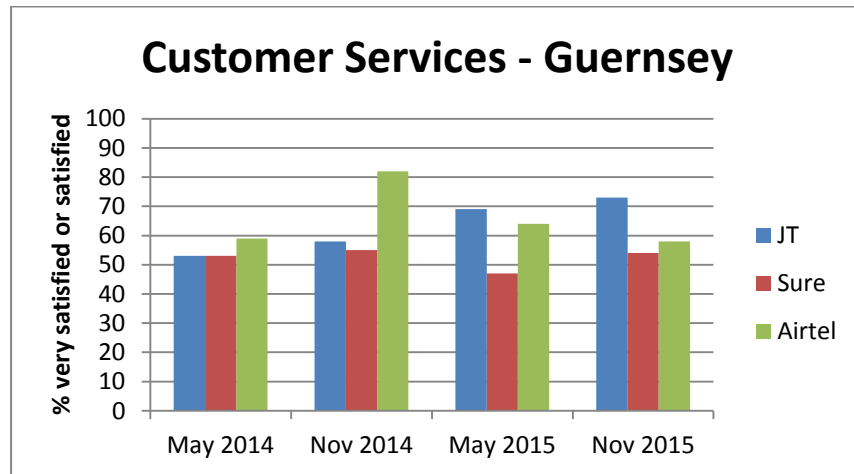
**‘Over the last six to 12 months have you had to contact customer services with regards to your mobile service?  
If yes, how would you describe your overall experience dealing with customer services?’**

Overall, since CICRA’s first survey, customer satisfaction with customer services has increased across the Channel Islands with ratings in Guernsey and Jersey in November 2015 of 59% and 68% compared to 53% and 49% respectively in May 2014.

There were differences in the ratings achieved by individual providers in each island. Of the c.500 people surveyed in each island 40% of Jersey participants and 31% of Guernsey participants indicated that they had cause to contact customer services in the past six to 12 months.

In Guernsey JT’s customer service rating has consistently improved over the course of the four surveys and now exceeds that of the other two operators who now appear to be significantly behind JT in this category. There is evidently room for those operators to make further improvements.

In Jersey Sure and Airtel have similar and significantly higher ratings than JT in this category. JT’s rating is improving but continues to lag some way behind.



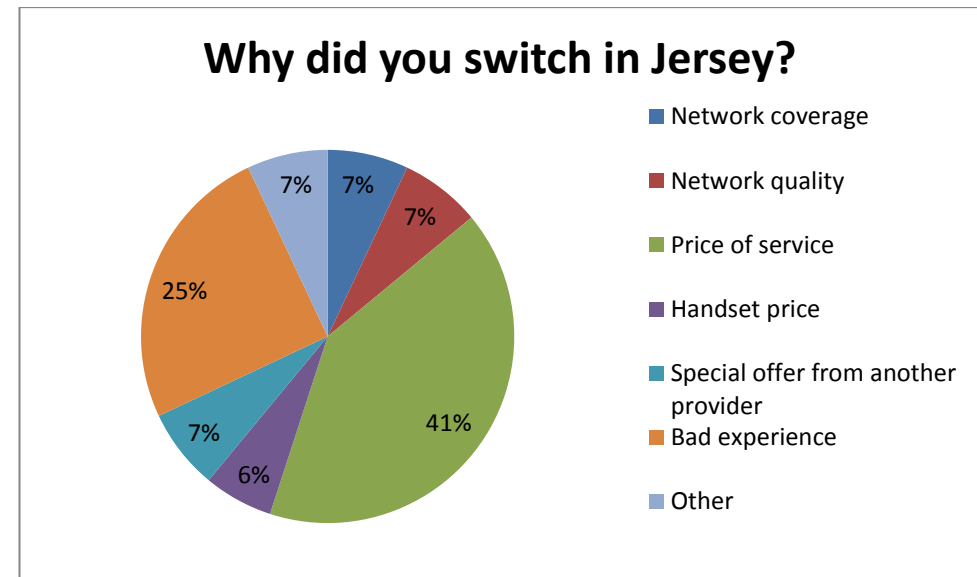
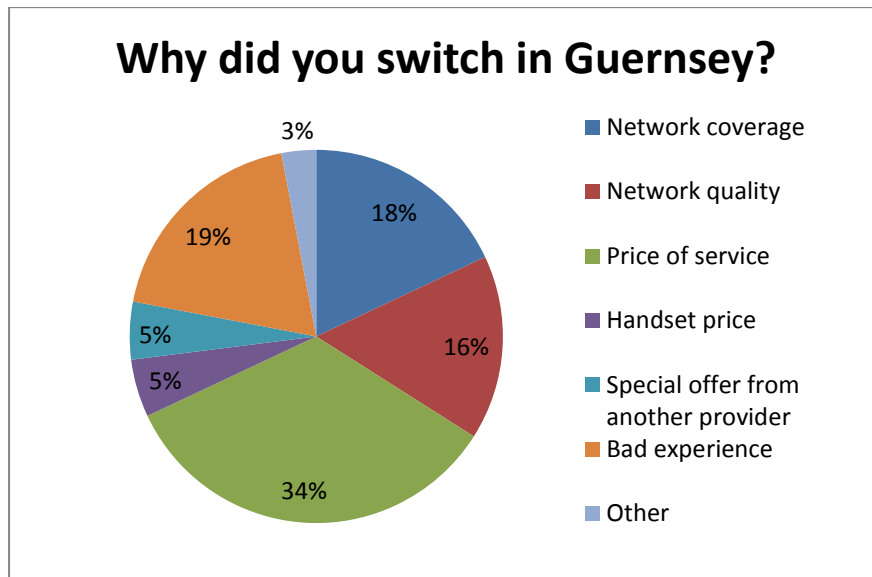
## Switching providers

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 41% indicating that price of service was the main reasons for changing followed by 25% citing bad experience.

In Guernsey 6% of those surveyed had changed provider with 34% of those indicating that price of service was the main reason for changing followed by 34% citing network coverage and quality.



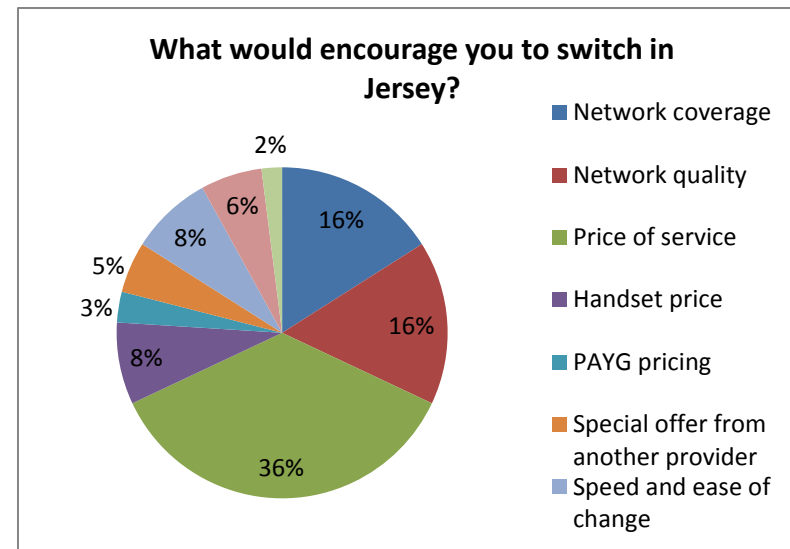
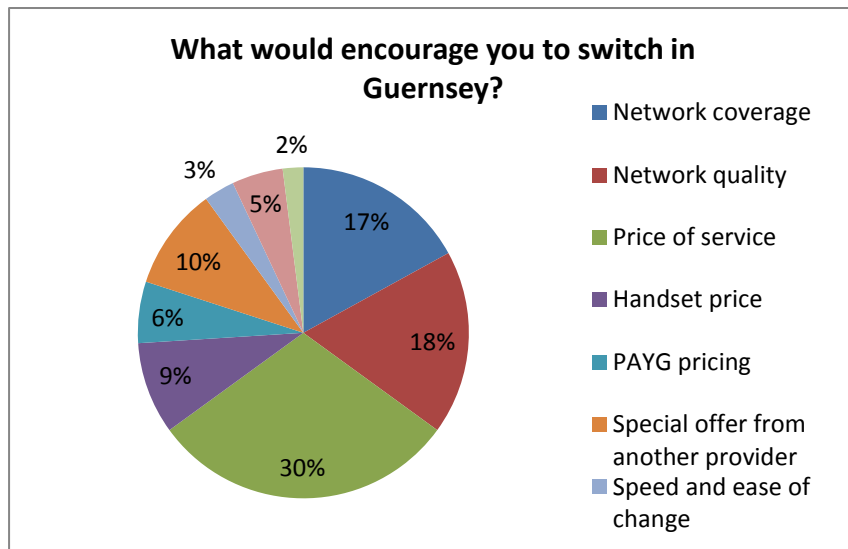
## Switching providers (cont.)

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?'**

19% of Jersey participants and 14% of Guernsey participants said that they were either likely or very likely to change their provider in the future. In both islands the most often cited reasons for seeking to change providers was pricing (36% in Jersey and 30% in Guernsey).

Across the board in both Jersey and Guernsey fewer survey participants said they are likely or very likely to change provider in the future compared with the November ratings. Of those likely or very likely to change provider, a significant proportion indicated that pricing plays an important role in their purchasing decision. This sends a powerful message to providers to ensure that the products and services that they offer, both now and in the future, are perceived to offer value for money.





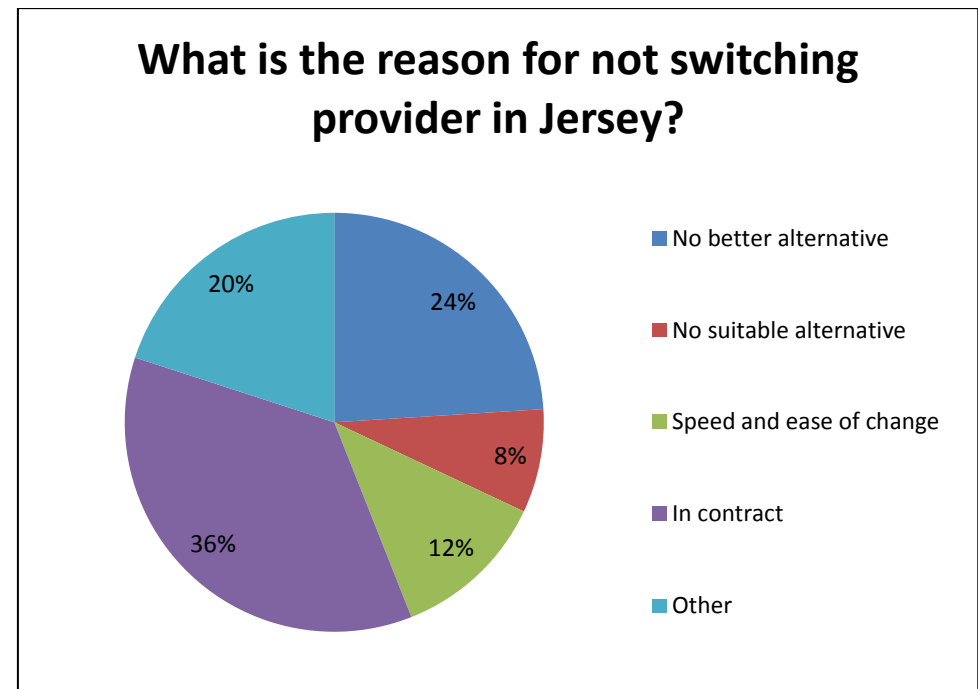
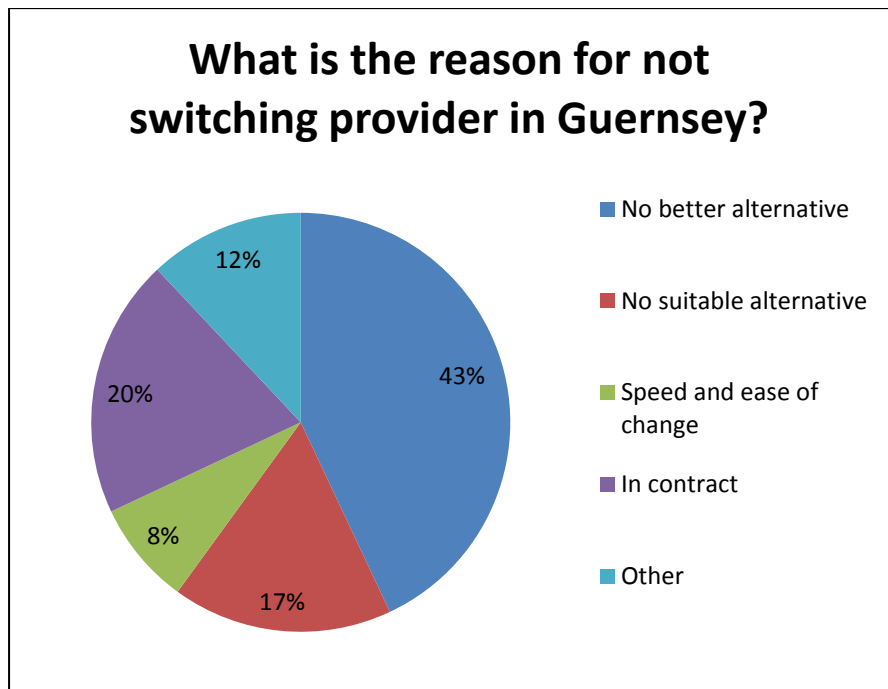
## Switching provider (cont.)

A new question was asked in the November 2015 survey. Survey participants were asked the following:

**'If you are not satisfied with your current fixed-line provider but you haven't switched, what is stopping you from doing so?'**

In Guernsey 60% cited there being no better or suitable alternative as the main reason for not changing.

In Jersey the most commonly cited reason for not changing provider was due to being in a contract (36%) followed by there being no better or suitable alternative (30%).



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

Contract lock-ins do restrict options for a period of time when customers wish to switch provider. However if you are out of contract and free to switch here are 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. You should however always compare the various options to ensure you get the best deal for your circumstances.

### **4) Mobile providers offer different options**

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 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. CICRA has required operators to allow you to take your number with you when you change provider and the channel islands has one of the quickest porting processes in the world.

## What are we doing about it?

During 2015, as part of our work programme for the year, we will be reviewing the current service standards received by telecoms customers to ensure they are fit for purpose. This review will take place in conjunction with telecoms operators who themselves have in place customer engagement processes.

We will provide all the (anonymised) data to operators and work with them operators to ensure their attention is focussed on the areas we consider will deliver the greatest improvement to customer satisfaction.

## Next steps

The survey is scheduled for May 2016. This will continue to 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.