



Telecoms Customer Satisfaction Survey

Results from May 2016 Survey

Document No: **CICRA 16/29**

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July 2016

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Introduction

This report on telecoms customer satisfaction marks a change in the way that we, the Channel Islands Competition and Regulatory Authorities (CICRA), will be reporting customer satisfaction going forward.

We expect this report to help

- customers make decisions about which telecoms provider they subscribe to and which provider they choose in the future
- local telecoms operators by providing independent feedback showing where they may need to consider changes and improvements 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

This is the first report based on the results of our new style questionnaire, although some questions have been carried forward so that we can track changes in customer satisfaction over time and gauge the providers' responses to customer feedback. We plan to undertake this survey annually.

In May 2016 we commissioned this survey of c.1,000 customers across the Channel Islands¹. We have focussed on areas in which we know customers are particularly interested - quality of service and value for money. To reflect the feedback given in previous surveys we were also keen to provide operators with direct independent feedback to support future product development and investment priorities. Further details of our methodology can be found on our website www.cicra.gg.

CICRA is the name given to the Jersey Competition Regulatory Authority and the Guernsey Competition and Regulatory Authority. Our aim is to ensure markets work well for Channel Islanders; 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.

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 c.500 self selecting participants 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

Consistent with previous surveys, participants were asked the following question

'Overall how satisfied are you with the quality of the service you receive from your telecoms provider?'

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

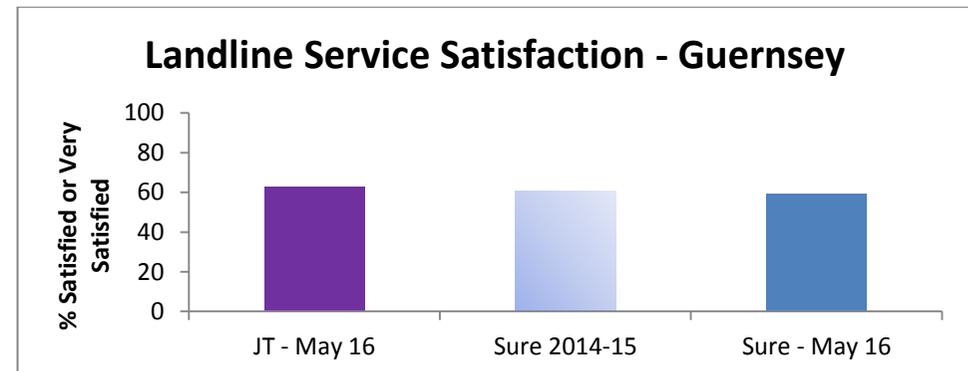
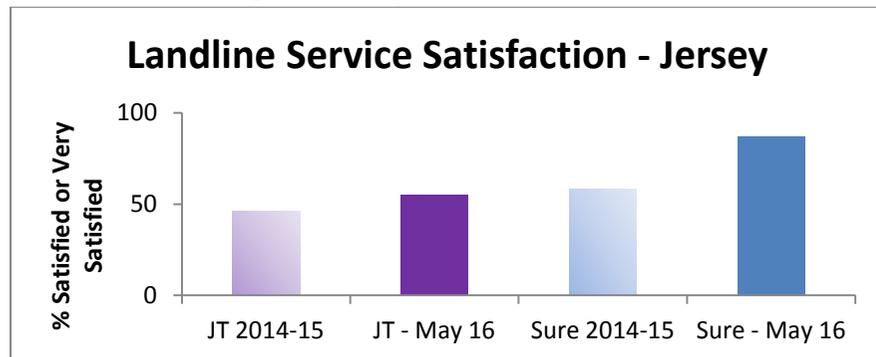
We expect operators to want to achieve positive customer satisfaction ratings, i.e. very satisfied or satisfied ratings.

Landline – satisfaction levels maintained in Guernsey and improving in Jersey

Landline services include calls using fixed line phones, exchange lines and related services associated with having a fixed line phone service.

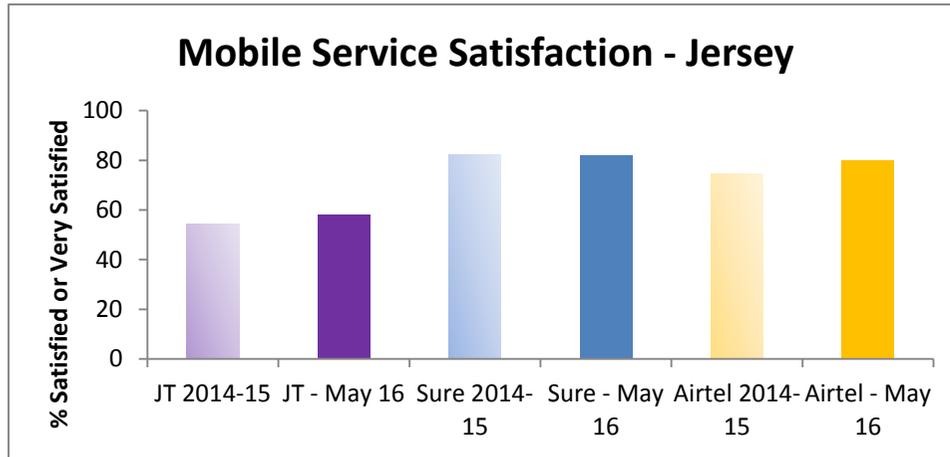
In Jersey customer satisfaction with landline services is improving; the results for May 2016 exceed the average of those achieved in previous periods. Higher satisfaction ratings have been achieved by Sure (87%) (which began offering exchange line services from June 2015) compared with JT (55%).

In Guernsey customer satisfaction with landline services is consistent with that achieved in previous periods. JT was rated slightly ahead of than Sure achieving 63% compared to Sure's 59%².

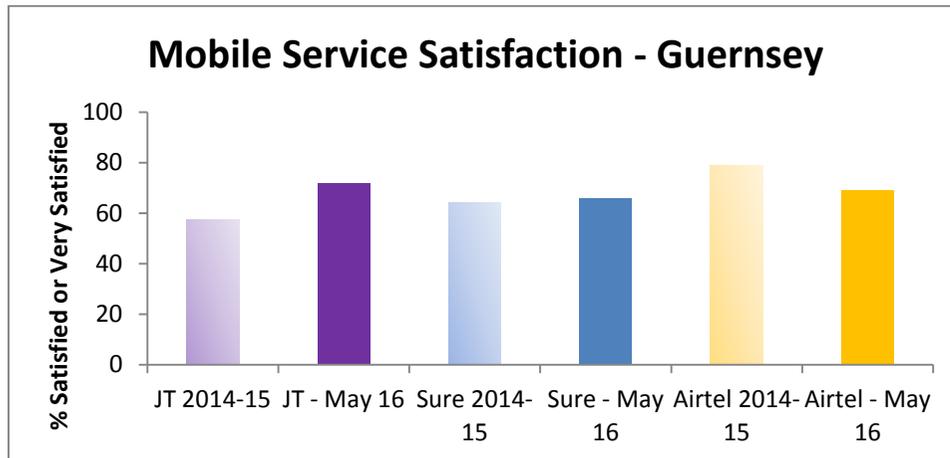


² The sample of JT customers pre May 16 in Guernsey was statistically too small to report.

Mobile telecoms – results generally show improvement

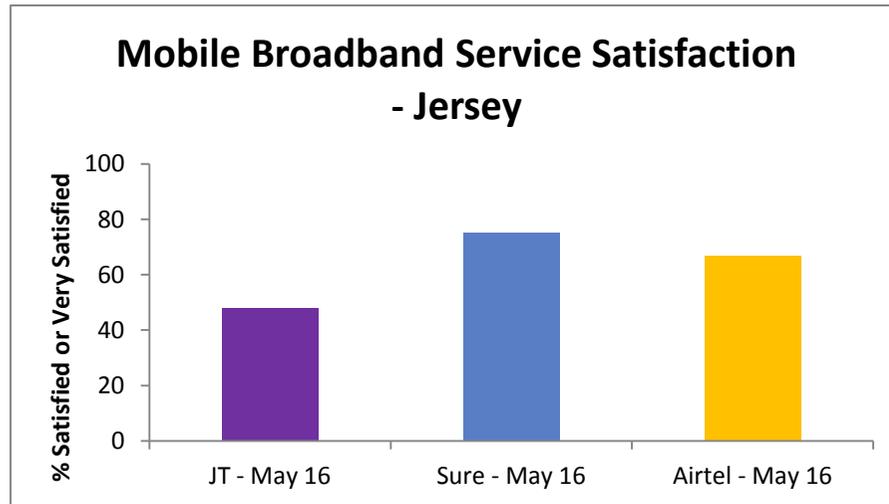


In Jersey customer satisfaction with mobile telecoms services continues to improve with the results for all operators in the latest survey exceeding the averages achieved in previous periods. Overall, Sure (82%) and Airtel (80%) were rated significantly ahead of JT (58%).



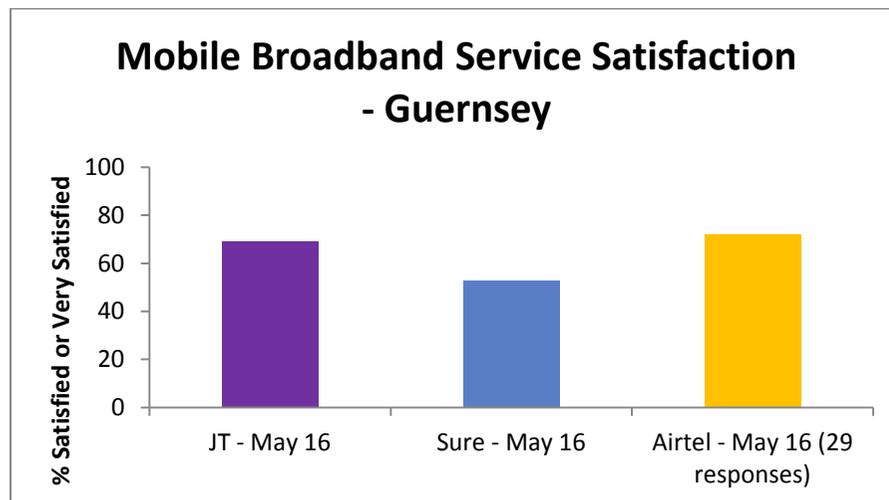
In Guernsey customer satisfaction with mobile telecoms services is broadly consistent between operators. However while JT and Sure's performance is continuing to improve, Airtel's performance shows sign of decline. Ratings were JT 72%, Sure 66% and Airtel 69%.

Mobile broadband – first time ratings



In Jersey customer satisfaction with the newer suppliers, Sure (75%) and Airtel (67%), is higher than that of the 'incumbent' JT (48%).

Customers rate their experience of mobile broadband less favourably than their experience of their mobile telephone more generally.



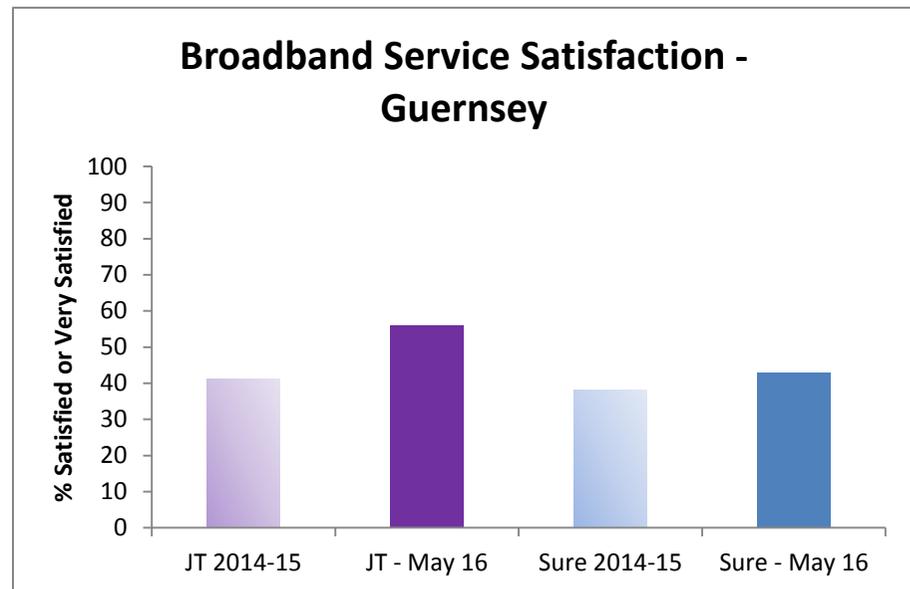
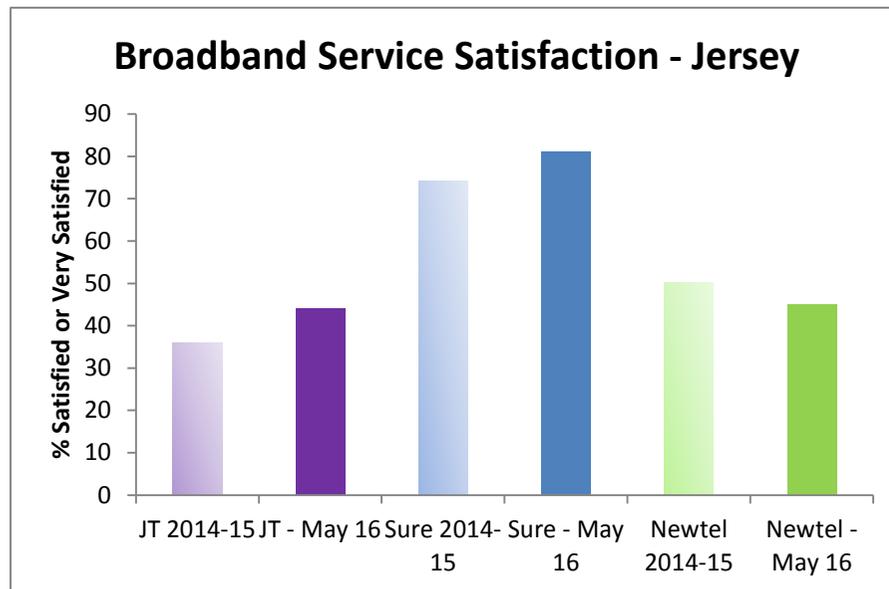
In Guernsey customer satisfaction with the new suppliers, JT (69%) and Airtel (72%), is higher than that of the 'incumbent', Sure (53%).

Customers rate their experience of their 'mobile' broadband services as more satisfactory than customers rate their experience of 'fixed' broadband.

Broadband telecoms – improving but more work to do

Customer satisfaction with broadband is on an upward trend in general. However, with the exception of Sure in Jersey, there remains a high proportion of customers on both islands who do not consider their broadband experience to be positive.

Ratings achieved in Jersey were JT 44%, Sure 81%, and Newtel 45%, and in Guernsey JT 56% and Sure 43%.



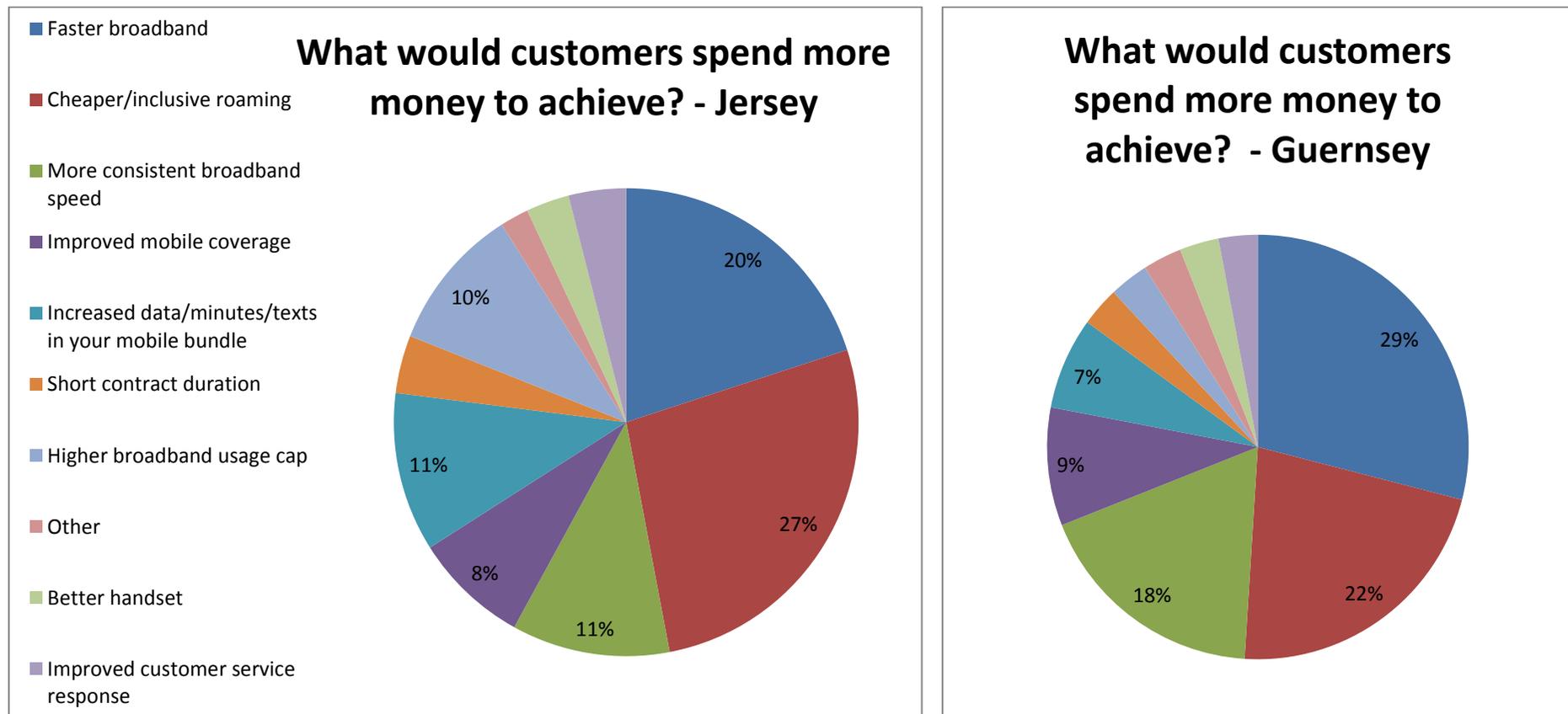
Future improvements – broadband and roaming

Participants were asked the question

“If you had £5 more each month to spend on any telecoms service what would you want for that money?”

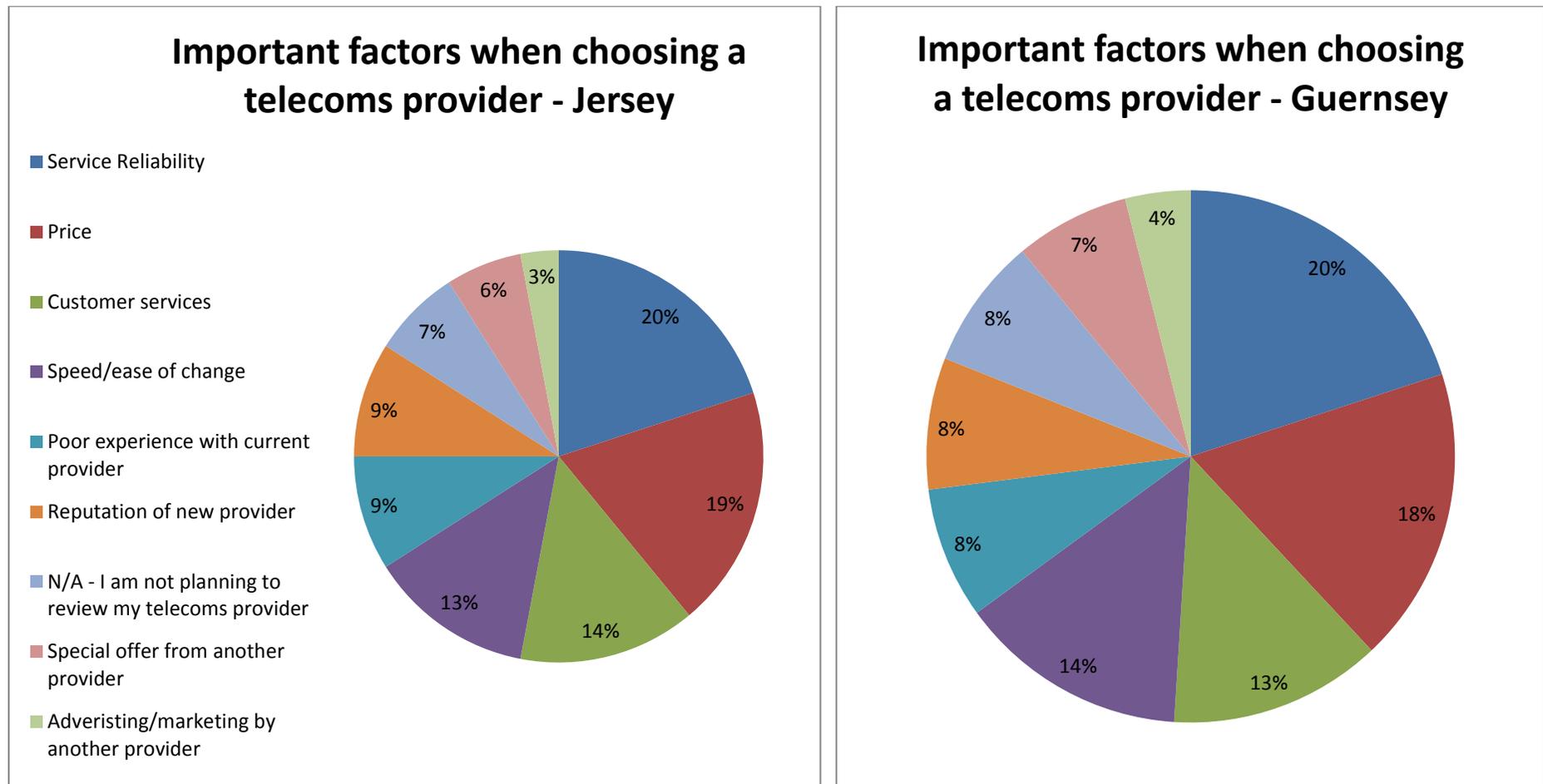
Participants were asked to rank the options given in order of importance and responses were weighted accordingly.

In both islands the highest priorities for customers were identified as cheaper/inclusive roaming and faster/more consistent broadband.



Factors of a good provider – reliability scores high

Customers in both islands had similar views on what was important when choosing a new telecoms provider. In both cases reliable service, competitive prices and good customer services, with a fast and easy changeover when changing provider, made up approximately two thirds of the services consumers wanted when they were considering a change.



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 the same 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.

How we will use this information

During 2016, as part of our work programme for the year, we are 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 also play an important part in the customer engagement processes.

We will provide all the (anonymised) data from this survey to operators and work with them to ensure their attention is focussed on the areas we consider will deliver the greatest improvement to customer satisfaction. The data will be combined with conclusions from market developments and studies when determining which areas need to be targeted.

For example, following the successful launch of wholesale line rental in June 2015, we will also take into account changes in customer's views and satisfaction levels when considering what additional wholesale access products would deliver most benefit to local customers.

In addition, we undertook a large scale study of consumer internet experiences across the Channel Islands in 2015, partly as a result of lower than ideal satisfaction levels achieved by operators. The results of that study, together with gauging customer satisfaction feedback, will help us to set our regulatory priorities going forward.

Next steps

The next survey is scheduled for May 2017. This will continue to allow us to track changes in customer satisfaction levels over time as well as gauge 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 and to encourage consumers to participate in the next survey to ensure their priorities drive improvement as well as inform regulatory priorities.