Customer Satisfaction Survey

Mobile Results

Document No: **CICRA 15/31**

July 2015

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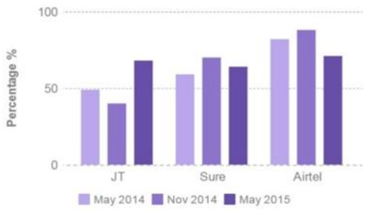
Telecoms Satisfaction Survey - Headline Results

Mobile - Guernsey

Quality of Service



Satisfied or very satisfied

Billing

Satisfied or very satisfied

Changed service provider

Likely/very likely to change provider

The main driver for both continued to be price

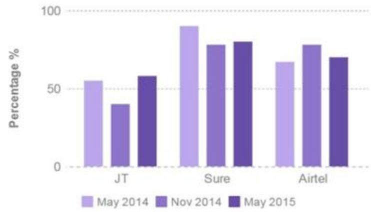
Satisfaction with provider's customer service

28%
of customers had cause to contact customer services

Satisfied or very satisfied

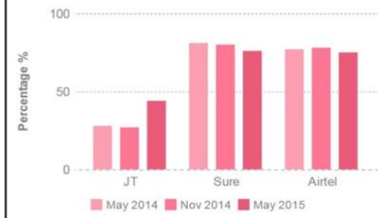
Mobile - Jersey

Quality of Service



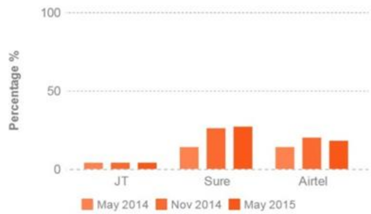
Satisfied or very satisfied

Billing

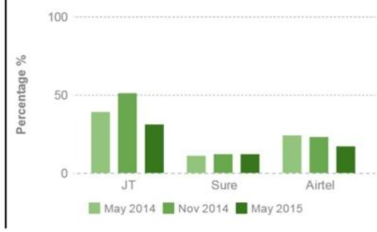


Satisfied or very satisfied

Changed service provider



Likely/very likely to change provider



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Satisfaction with provider's customer service

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Satisfied or very satisfied

Introduction

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

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 May 2015 we commissioned our third survey of 500 customers[1] 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 telecoms services (for which the report was issued on 1 July 2015, and broadband (which will be the focus of the final report to be issued shortly). Further details of our methodology can be found on our website 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. 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

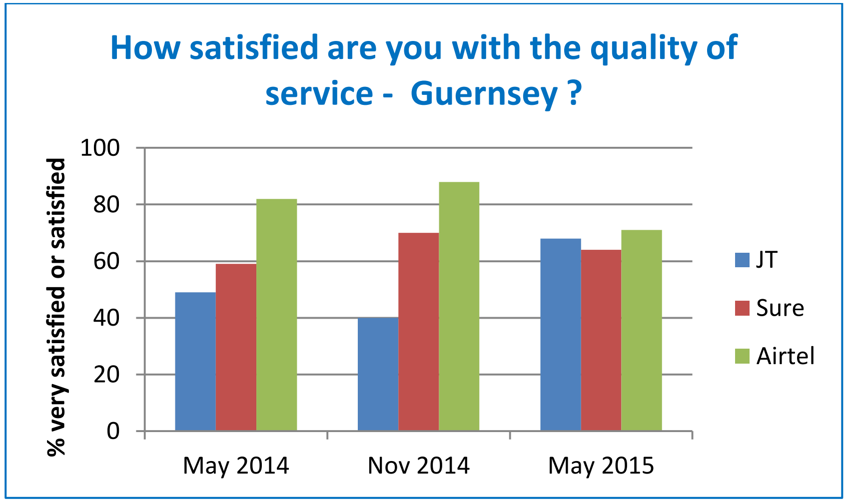
'Overall, how satisfied are you with the quality of the mobile service you receive from your provider?'

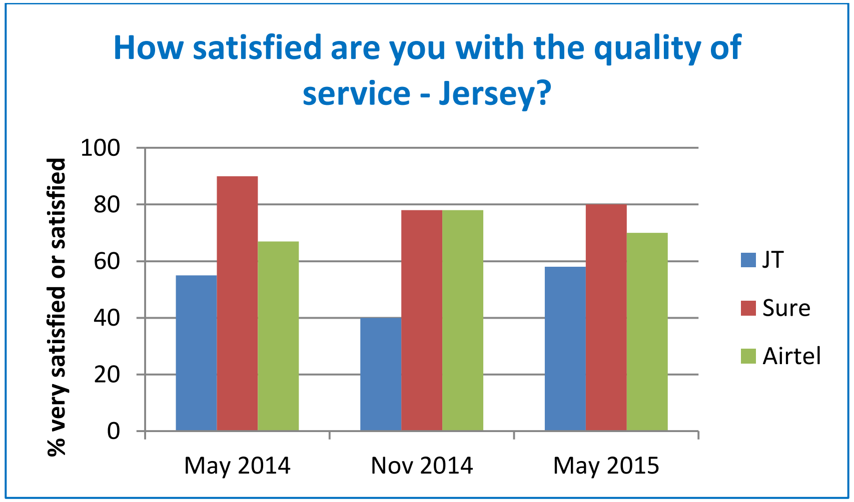
Participants were asked to answer on a scale of very satisfied, satisfied, neither satisfied nor dissatisfied, dissatisfied or very dissatisfied.

Two thirds of participants across the islands rated their mobile quality of services as satisfactory or very satisfactory compared to 68% in Guernsey and 57% in Jersey in November 2014. However there are differences in the ratings achieved by individual providers in each island, with a wider range seen in Jersey.

In Guernsey 71% of Airtel participants indicated that they were satisfied or very satisfied with their mobile quality of service compared with 68% of JT participants and 64% of Sure participants. JT's results have improved since November 2014 when it achieved a rating of 40%, but have declined for Airtel and Sure which had ratings 88% and 70% respectively. The gap in customer satisfaction levels between the best and worst performers is narrowing but overall operators are not showing sustained improvement.

In Jersey 80% of Sure participants, 70% of Airtel participants and 58% of JT participants indicated that they were satisfied or very satisfied with their mobile quality of service. The November results from Sure, Airtel and JT were 78%, 78% and 40% respectively. JT's results show a marked improvement but there is still a significant gap between its rating and those achieved by Sure and Airtel.





Billing

Survey participants were asked the following question

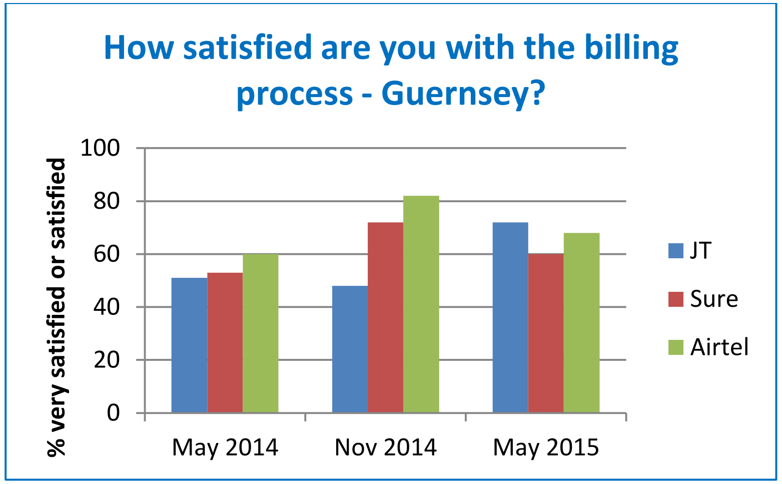
'How satisfied are you with regard to your provider's billing process for mobile?'

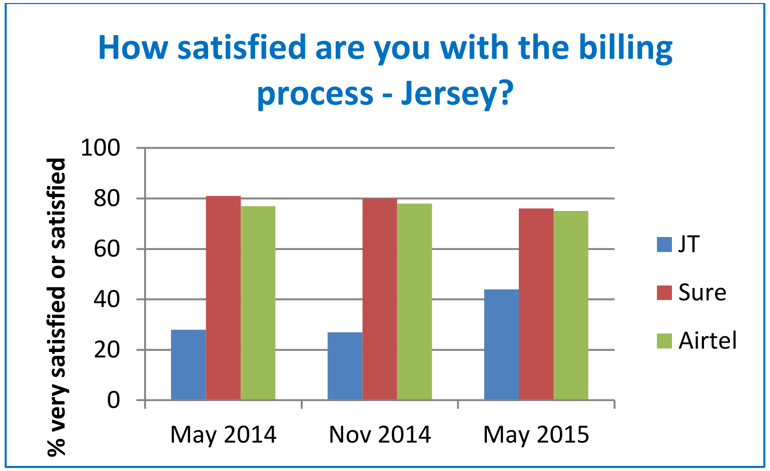
Participants were asked to answer on a scale of very satisfied, satisfied, neither satisfied nor dissatisfied, dissatisfied or very dissatisfied.

63% of Guernsey participants and 57% of Jersey participants rated their billing as satisfactory or highly satisfactory. Ratings in November were 70% and 50% respectively.

In Guernsey, JT achieved the highest rating with 72% of participants indicating that they were satisfied or very satisfied with their mobile billing compared with 68% of Airtel participants and 60% of Sure participants. JT's rating has improved significantly from November when its rating was 48%, however both Airtel and Sure's ratings have fallen since November when their ratings were 82% and 72% respectively.

In Jersey, Sure and Airtel received similarly high scores with 76% and 75% respectively of participants responding that they were satisfied or very satisfied with their mobile billing, compared with 44% of JT participants. JT's rating has improved since November when ratings were 80%, 78% and 27% respectively. However there is still a significant gap between Sure and Airtel, and JT.





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?'

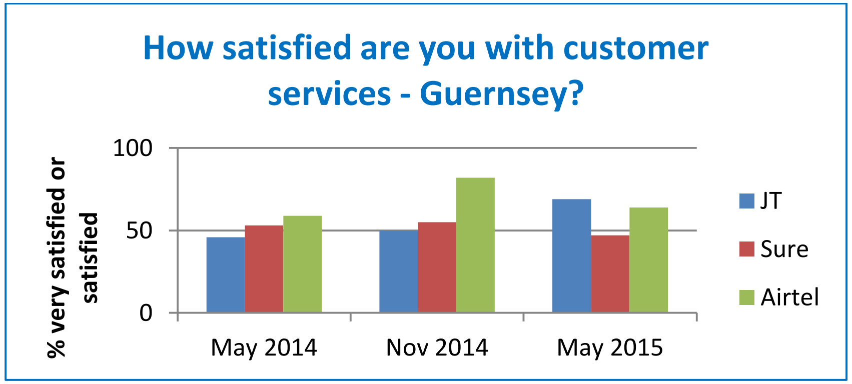
39% of Jersey participants had contacted customer services with 59% reporting that they were satisfied or highly satisfied with their experience compared to 45% in November.

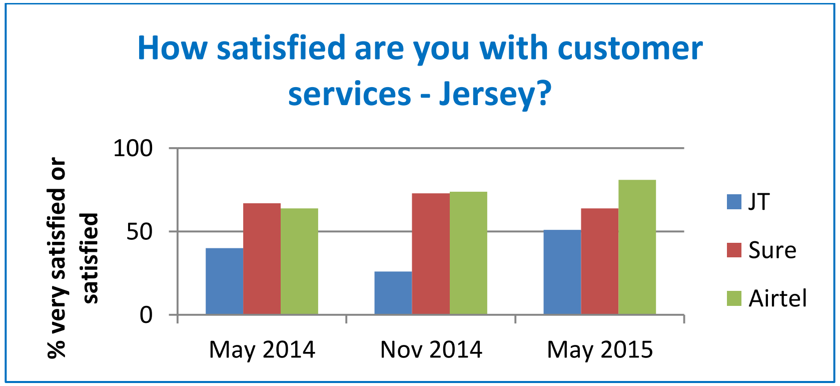
28% of Guernsey participants had contacted customer services with 56% of those reporting that they were satisfied or highly satisfied with their experience compared to 59% in November.

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

In Guernsey 69% of JT participants rated their experience of customer services as satisfactory or highly satisfactory compared with 64% of Airtel participants and 47% of Sure participants - the November results being 50%, 82% and 55% respectively. The results indicate that participants feel that JT's customer services have improved since November but that Sure's and Airtel's customer service response has declined over the same period, with Sure lagging behind JT and Airtel.

In Jersey 81% of Airtel participants rated their experience of customer services as satisfactory or highly satisfactory compared with 64% of Sure participants and 51% of JT participants – the November results being 74%, 73% and 26% respectively. JT's rating has doubled since November showing good progress, through still lagging behind that of Sure and Airtel.





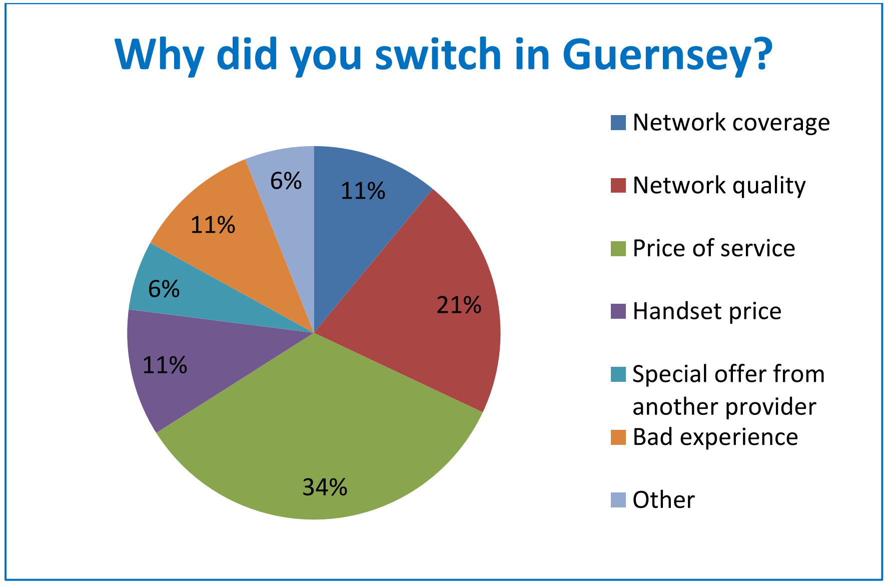
Switching providers

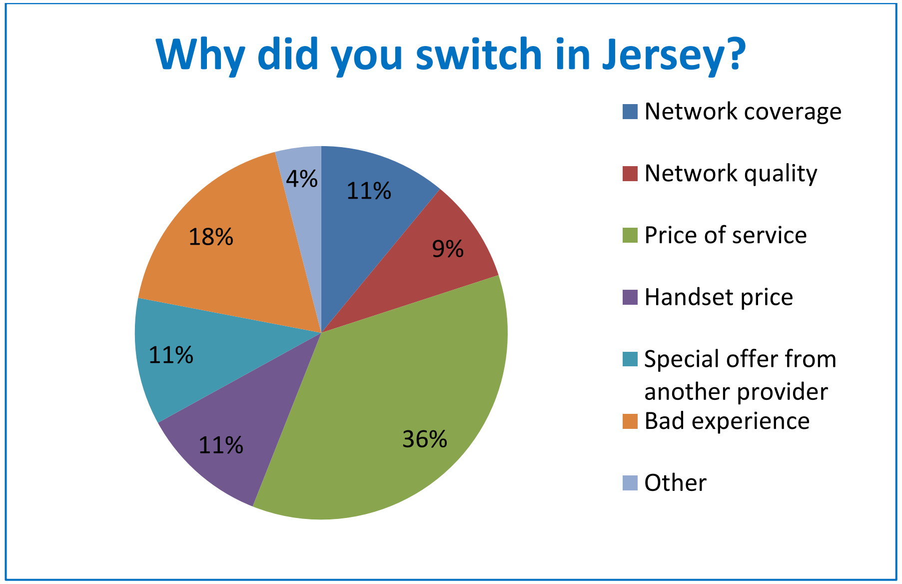
Survey participants were asked the following questions

'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 58% indicating that pricing and special offers were the main reasons for changing followed by 20% citing network coverage and quality.

In Guernsey 5% of those surveyed had changed provider with 51% of those indicating that pricing and special offers were the main reasons for changing followed by 32% citing network coverage and quality.





Switching providers (cont.)

Survey participants were also asked the following questions:

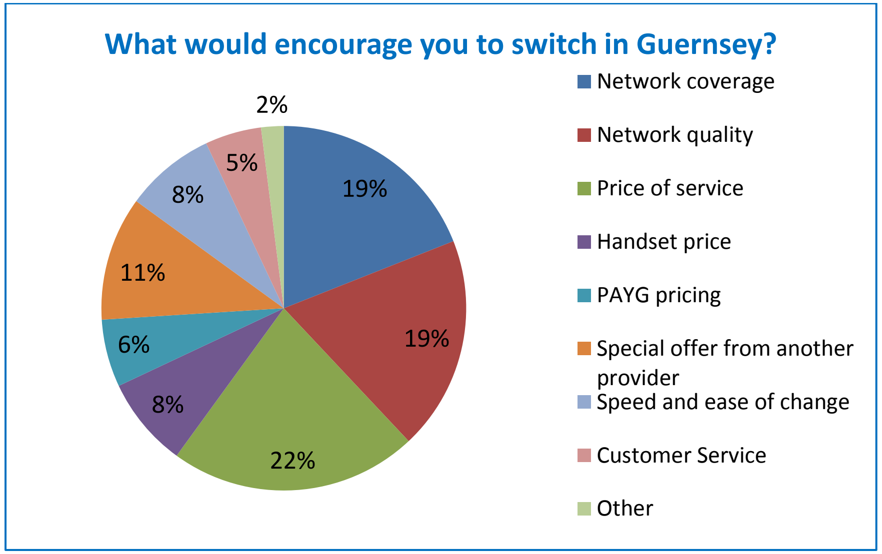
'How likely are you to change your mobile provider in the future? If you have answered 'very likely' or 'likely' what are your main reasons for possibly changing provider?'

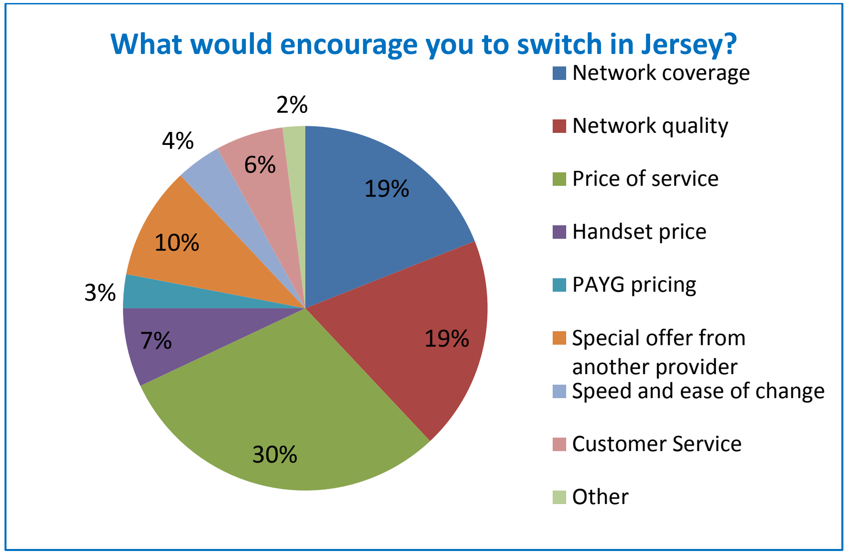
24% of Jersey participants and 16% of Guernsey participants said that they were either likely or very likely to change their provider in the future. In both islands the most often cited reasons for seeking to change providers were pricing and special offers (51% in Jersey and 47% in Guernsey).

In Jersey 31% of JT participants said they are likely or very likely to change provider in the future compared with 17 % of Airtel participants and 12% of Sure participants. In November the ratings were 51%, 23% and 12% respectively.

In Guernsey 22% of Airtel participants, 21% of JT participants and 15% of Sure participants said they are likely or very likely to change provider in the future In November the ratings were 18%, 28% and 15% respectively.

A significant proportion of participants have 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 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 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

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

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 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 November.