Quality of Customer Service report

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Section 1

Introduction

Background

Ofcom (Office of Communications) is the regulator for the UK communications industries, with responsibilities across television, radio, fixed line and mobile telecommunications, postal services and radio spectrum. Ofcom's primary duty under section 3(1) of the Communications Act 2003 (the "Act") in carrying out its functions is to further the interests of UK citizens in relation to communications matters and to further the interests of consumers in relevant markets, where appropriate by promoting competition.

Since 2009 Ofcom has conducted research to quantify levels of satisfaction with customer service for the main communications providers in the UK (defined as those providers with a market share of 4% or more within a sector). This research enables Ofcom to monitor the customer service experience, understand whether this varies by the type of issue being dealt with, and to evaluate changes over time by market and provider.

This report shows the results of the seventh wave of the research concerning the quality of customer services offered to customers of fixed line, broadband, mobile, and pay TV providers.

As with the previous waves of this research, this report details consumers' views based on their most recent contact with their provider within the three months prior to the interview. For this latest wave (with interviewing conducted in October 2015) the period relating to customer service experience was approximately July to September 2015.

Reports from the previous six waves of the research are available on Ofcom's website[1].

Research methodology and analysis

The methodology used for this seventh wave of the research was similar to that used for the previous six waves; with research conducted across two stages, as follows:

Stage 1

- 4,078 interviews undertaken across three weeks[2] of a nationally representative face-to-face omnibus survey[3] in order to provide a profile of the incidence of recent (last 3

[1] *2009 report:* http: //stakeholders.ofcom.org.uk/binaries/consultations/topcomm/annexes/qos-report.pdf
2011 report (wave 1): http: //stakeholders.ofcom.org.uk/binaries/research/telecoms-research/Quality-of-customer-service.pdf
2011 report (wave 2): http: //stakeholders.ofcom.org.uk/binaries/research/telecoms-research/customer-service/Customer_Service_Satisfacti1.pdf
2012 report: http: //stakeholders.ofcom.org.uk/binaries/research/telecoms-research/customer-satisfaction.pdf
2013 report: http://stakeholders.ofcom.org.uk/binaries/research/tv-research/Quality-Customer-Service-report-December-2013/Quality_of_service_report.pdf
2014 report: http://stakeholders.ofcom.org.uk/binaries/research/quality-of-customer-service-annual-reports/Quality_of_Customer_Service_2014_report.pdf

[2] The three waves of interviewing took place between 6th-11th August 2015, 10th-15th September 2015 and 5th-10th November 2015.

[3] In the years previous to 2014, the Stage 1 omnibus interviews were conducted by telephone. This method was not available from the omnibus provider from 2014 onwards and so a face-to-face omnibus approach was used instead.

months) contact (by phone, email, webchat or letter[4]) with providers in each sector, and the types of issues (Billing, Fault/ Repair, General) that consumers contacted their providers about.

- This profile of the contact incidence combined with the type of issues raised was used to weight the Stage 2 (online) data for each provider within each sector (fixed line, broadband, mobile, and pay TV). This weighting was applied to reflect the incidence of contact and the issue that the contact related to for each provider in each sector at each wave of the research.

Stage 2

- An online panel survey was used to interview customers who had made contact with their provider/s in the three months prior to the interview by phone or email. Minimum targets were set per provider in each sector; with between 1,000 and 1,600 customer service experiences targeted per sector.

- In the event that a respondent took multiple services from the same provider and had contacted that provider to discuss both/ all of these services, they answered all relevant sections of the questionnaire.

- A total of 5,400 customer experiences were covered in detail across the four sectors through the online panel research.

- Some of the stage 2 interviewing was conducted after the media coverage of the TalkTalk website attack, initially covered on 23 October 2015. The interviews conducted before and after the media coverage have been compared to assess whether there was likely to have been any material impact on the results for TalkTalk which should be taken into consideration when reporting on the findings. We are confident there was not such an impact.[5]

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[4] In the years previous to 2014, contact with communications providers was required to be made by phone or email. The options for the method of contact were extended from 2014 to also cover contact by webchat or by letter.

[5] Of the 300 interviews conducted with TalkTalk landline customers who made contact in the last 3 months, 255 were conducted before the coverage and 45 after.

- The reasons for contact before the coverage (255 base) were 47% Billing, 25% Faults & Repair and 28% General Enquiries
- Before the coverage, 42% said they were making contact with a complaint
- The reasons for contact after the coverage (45 base) were 42% Billing, 31% Faults & Repair and 27% General Enquiries
- After the coverage, 40% said they were making contact with a complaint

Of the 400 interviews conducted with TalkTalk broadband customers who made contact in the last 3 months, 345 were conducted before the coverage and 55 after.

- The reasons for contact before the coverage (345 base) were 33% Billing, 41% Faults & Repair and 26% General Enquiries
- Before the coverage, 40% said they were making contact with a complaint
- The reasons for contact after the coverage (55 base) were 31% Billing, 45% Faults & Repair and 24% General Enquiries
- After the coverage, 42% said they were making contact with a complaint

Inclusion criteria

- Stage 1 (UK representative omnibus survey) had a threshold for inclusion of 4% market share.
- From 2014 onwards a further criterion for inclusion at Stage 2 (online panel survey) was introduced. A minimum of 35 interviews would need to be achieved at Stage 1 with customers who have been in contact with their provider in the previous three months for that provider to be eligible for inclusion at Stage 2.
- The rationale for this change was that data collected in Stage 1 provides the profile of contact types for each provider, and was used to weight data collected in Stage 2 (the online survey). Ofcom considered 35 interviews to be the minimum number that can be used effectively to weight data at Stage 2.
- In 2015 we conducted three waves of Stage 1 omnibus interviewing in order to provide more robust data for weighting at stage 2.
- Non-inclusion at Stage 2 did not necessarily mean low levels of complaints, but may also have meant low levels of general enquiries and/or low provider market share, resulting in contact volumes that were too low for inclusion. By the same token, inclusion in this research did not necessarily mean a high level of complaints.
- Based on these criteria some providers eligible for this study (i.e. with at least 4% market share) were not included at Stage 2, because fewer than 35 interviews were conducted with customers who had been in contact with that provider in the previous 3 months. Stage 1 providers not included at Stage 2 in 2015 were: mobile phone – Tesco (20), Pay TV – BT TV (19), and TalkTalk TV (15). Orange/EE broadband was excluded from the report on the basis of not meeting the market share threshold in 2015.

Mobile provider coverage

- In the years prior to 2014, within the mobile phone sector we reported on satisfaction with customer services for Orange and T-Mobile customers separately. Satisfaction among EE mobile phone customers was not reported prior to 2014 as market share was below the 4% threshold for inclusion. From 2014 onwards it was considered most appropriate not to merge findings for these providers in previous waves of research as the customer service systems and processes in Orange and T-Mobile were not fully integrated when those previous waves were conducted.
- In 2014, Ofcom was advised by EE that customers of each of their mobile brands (EE, Orange and T-Mobile) were dealt with by the same customer service team. As such the 2014 and 2015 reports include satisfaction with customer services for EE overall based on combining the responses from customers of each of the three mobile brands; EE, Orange and T-Mobile.

Copies of the questionnaires used at Stage 1 and Stage 2 are included in the appendix of this report.

Within this report, differences between the 2015 and 2014 research findings, and any differences between an individual provider and the sector average are only reported when they are statistically significant. Significance testing at the 99% confidence level was carried out. This means that where findings are commented on in the report, there is only a 1% or less probability that the difference between the samples is by chance. Statistically significant findings are indicated by arrows and by text within each of the Figures throughout the report.

Where we report a provider's position as in line with the sector average, we mean there is no statistically significant difference between that average and that provider. There may, nonetheless, be statistically significant differences between providers whose positions are reported as each in line with the sector average.

Section 2

Executive summary

Overview of sectors

- **Providers have maintained a satisfactory level of customer service to between 67% and 76% of consumers** across sectors. The level of overall dissatisfaction with customer service was low in comparison, at between 5% and 11% (Figure 7). The levels of satisfaction and dissatisfaction at a sector level were unchanged from 2014.

- **Around one-fifth (between 17% and 19%) of consumers in each of the broadband, mobile and pay TV markets had contacted their provider in the three month period in 2015** (landline was lower at 12%) (Figure 1). The proportion of contacts to providers in the pay TV sector was significantly lower than in 2014 (down to 17% from 22%), whilst contact with providers in the landline, broadband and mobile sectors has not significantly changed. Reason for contact had not significantly changes since last year: contact relating to general issues (not specifically billing or faults/ repairs) accounted for 40% and 49% of contacts in the landline and mobile markets. In the broadband market, contact was more likely to relate to a fault/ repair issue (47%) than a general issue (29%). In the pay TV market, contact was equally likely to relate to billing (33%), faults/ repairs (35%) or general issues (33%).

- **Up to two in five consumers (between 27% and 37%) in each market who had contacted their provider said this was with a complaint** (Figure 2). This was not significantly different to 2014, with broadband again having the highest proportion of complaints, most commonly relating to broadband speeds.

- **Dissatisfaction in relation to complaints was at least two times higher than for non-complaints across all sectors**: landline (15% vs. 3%), broadband (19% vs. 6%), mobile (16% vs. 6%) and pay TV (9% vs. 4%). Levels of satisfaction and dissatisfaction in relation to complaints were unchanged from 2014.

- **Contact via the phone remains the most likely method in all sectors, with 49%-60% of contact being 'only on the phone'** (Figure 3), and a further 25%-32% 'mainly on the phone'. Contact via another method (email, webchat or letter) was comparatively lower, with between 8% and 13% of consumers making contact only using another method.

- **Around half of general queries were reported as completely resolved in one contact in each sector (49%-60%)** (Figure 5). Compared to 2014, billing queries in the mobile sector were less likely to be completely resolved in one contact (42% vs. 51%), while faults/ repairs remain relatively unlikely to be completely resolved in one contact (26%-40%).

- **Among those whose issue was completely resolved, providers achieved this resolution in less than one hour for between 51% and 66% of consumers** across sectors (Figure 6). Resolution in less than one hour was less likely than in 2014 in the broadband (51% vs. 57%) and pay TV (60% vs. 70%) sectors.

Landline

Overall contact

- **Overall customer contact in the landline sector (12%) remained broadly unchanged on previous years** (Figure 12), but the level of contact from TalkTalk landline customers has declined since 2014 (11% vs. 21%)**.** The proportion of contacts considered to be complaints remained unchanged since 2014 (34%), with no significant differences by provider (Figure 13). The reason for contact is skewed towards general issues (40%), with the remainder broadly equal between billing (32%) and fault/repair (28%) (Figure 14), and no significant differences compared to 2014 or between providers.

- **Around four in ten landline customers (44%) had their issue resolved in a single contact,** which is broadly similar with previous years (Figure 17). TalkTalk landline customers were less likely than the sector overall (34%) to have their issue resolved in a single contact.

Customer service

- **Overall, customer service satisfaction in the landline sector (70%) was unchanged from 2014** (Figure 20)**.** In 2015, satisfaction with Sky (79%) was significantly above average for this sector. Satisfaction with TalkTalk was below average both overall (56%) and with regards to complaints (43% vs. 61%) (Figure 21). Other providers covered in this market (BT and Virgin Media) showed levels of satisfaction comparable with the sector average, at both an overall level and among complaints specifically.

- **Sky customers reported higher than average satisfaction across almost every aspect of landline customer service** (Figure 22 to Figure 26), maintaining the satisfaction levels from 2014**.** Both Virgin Media and BT performed at the sector average level for each aspect, but BT saw improved satisfaction since 2014 for speed of answering phones (63% vs. 50%).

- **TalkTalk customers reported lower than average satisfaction across almost every aspect of landline customer service** (Figure 22 to Figure 26).

Broadband

Overall contact

- **Customer contact with broadband providers was at a similar level to 2014 (19%)** (Figure 28), and no provider saw an increase or decrease in contact. The proportion of contacts considered to be complaints was also similar to 2014 (37%) (Figure 29), with no significant differences by provider.

- **Of the three broad categories, fault/repair remained the most common reason for contact in the broadband sector (47%)** (Figure 30), with no significant differences by provider. Slow connection speeds continued to be the most common specific reason for contact (19%) (Figure 31).

- **Four in ten broadband customers (40%) had their issue resolved in a single contact** (Figure 33), which was unchanged from 2014. All individual providers included in this report were broadly comparable to the sector average and 2014.

Customer service

- **Satisfaction with broadband customer services (67%) remained unchanged since 2014** (Figure 36). Sky customers reported significantly higher than average levels of satisfaction (80%) while TalkTalk customers reported satisfaction that was significantly lower than average (53%). Other providers covered in this market (BT and Virgin Media) showed levels of satisfaction comparable with the sector average, at an overall level. Sky was the only provider in this market with higher than average satisfaction with complaints handling (76% vs. 53%) (Figure 37), while satisfaction with complaints handling was below average in 2015 for BT (41%) and TalkTalk (40%).

- **Sky customers reported significantly higher than average satisfaction for all of the 16 aspects of customer service** (Figure 38 to Figure 42), and an increased level of satisfaction for offering compensation or a goodwill payment compared to 2014. Virgin Media customers reported higher than average satisfaction for two aspects: ease of finding provider contact details and advisors' ability to understand issues and identify the problem.

- **BT and TalkTalk customers reported significantly lower than average satisfaction for at least half of the 16 aspects of customer service** (Figure 38 to Figure 42). For BT, these included ease of finding provider contact details, speed of answer, getting the issue resolved, and effective logging of query details. For TalkTalk, these included the time taken to handle the issue, having useful advice/information, advisors' ability to understand issues and identify the problem, and effective logging of query details.

Mobile

Overall contact

- **Customer contact to mobile phone providers was unchanged from 2014 (19%)** (Figure 44) and the proportion of contacts considered to be complaints in the mobile market was similar to previous years (27%) (Figure 45), but higher for EE in 2015 compared to the average (33%).

- **Of the three broad categories (billings, fault/repair and general enquiries) mobile customers were again more likely to contact their provider with a general enquiry (49%),** and less so for billing (30%) or fault/repair (20%) issues (Figure 46). This was broadly similar by provider and compared to 2014. 'Making a change to your package or service' continues to be the most common specific issue that mobile customers make contact about (18%) (Figure 47).

- **Almost half (48%) of mobile customers had their issue resolved in a single contact, which was unchanged from 2014** (Figure 49), with no significant differences among the providers or from 2014**.**

Customer service

- **Satisfaction with customer service among mobile phone customers was similar to 2014 (72% vs. 73% in 2014),** with higher than average satisfaction among O_2 customers (80%) (Figure 52). Satisfaction relating to mobile complaints handling also remained unchanged in the last 12 months (59%) and was again higher than average among O_2 customers (73%) (Figure 53).

- **O_2 customers reported higher than average satisfaction on ten out of the sixteen aspects of customer service** (Figure 54 to Figure 58), in particular in relation to contacting customer service, advice and resolution, and advisor ability. Virgin Mobile customers reported higher than average satisfaction with four aspects relating to contacting and the speed of customer service.

- **Vodafone and EE customers reported lower than average satisfaction** in relation to the ease of getting through to the right person and logging of query details, and for courtesy and politeness of advisors respectively.

Pay TV

Overall contact

- **Customer contact with pay TV providers (17% in 2015) was below the 2014 measure (22%)** (Figure 60), contributed to by a decline for Virgin Media (from 23% to 15% in 2015). The proportion of contacts classified as complaints was 28%, unchanged from 2014 and with no significant differences by provider (Figure 61).

- **Of the three broad categories, pay TV customers were equally likely to have contacted their provider with a billing query (33%) a fault/ repair (34%) or a general query (33%)**(Figure 62). There were no significant differences by provider.

- **Half of pay TV customers had their issue resolved in a single contact (50%) which was similar to previous years,** with no significant differences between providers (Figure 65).

Customer service

- **Overall satisfaction with pay TV customer service (76%) remained broadly comparable to that reported in 2014**. There were no significant differences by provider (Figure 68). Satisfaction relating to pay TV complaints also remained broadly unchanged in the last 12 months (67%) and comparable across provider (Figure 69).

- **There was no change in satisfaction with the various aspects of customer service from either provider** (Figure 70 to Figure 74)**.** Satisfaction ratings for Sky do not differ from the average for each aspect. Virgin Media customers reported lower than average satisfaction for two of the 16 aspects: calling back when they say they will and offering compensation.

Section 3

Overview of sectors

This section compares the different sectors (landline, broadband, mobile and pay TV) in terms of incidence of contact, whether the recent contact was a complaint or not, how the contact was made, what type of issue the contact related to, whether the issue was considered to be resolved, how long consumers had been in contact with their provider, and satisfaction with the customer service experience.

Comparisons are also made, where possible, between the findings for each sector from the 2015 research, and the previous wave of research conducted in 2014.

Detailed findings for each particular sector are covered in Sections 4 to 7 within this report.

Recent contact with provider

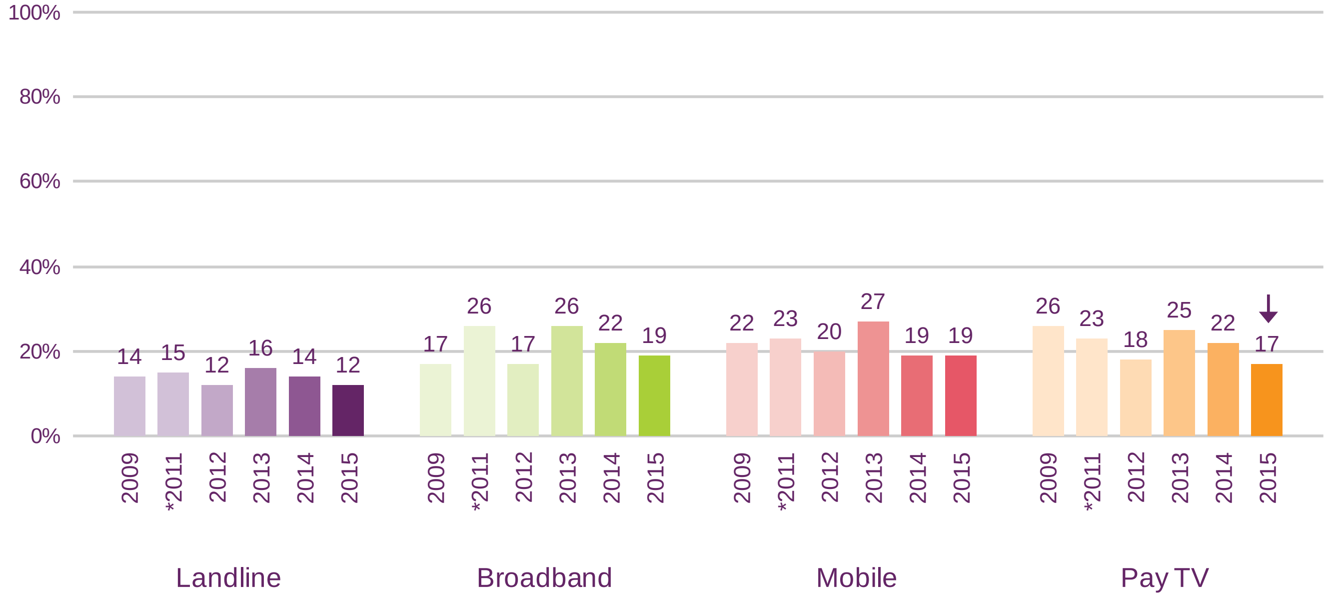
Contact with pay TV providers has decreased since 2014, with no change for other service providers

Figure 1 shows the proportion of customers who had made contact with their communications service provider by phone, email, webchat or letter[6] in the three months prior to the interview[7]. Compared to a similar period in 2014, the incidence of contact with the provider has decreased for pay TV (17% vs. 22%) and is at similar levels to 2014 for landline (at 12%), broadband (at 19%) and mobile (at 19%). The 2014 results had previously shown a decrease compared to 2013 in the incidence of contact for the broadband and mobile sectors.

[6] Prior to 2014 respondents were only asked about contact by telephone or email, with contact by webchat or letter added in 2014 so data from previous years is not directly comparable

[7] With the data for this measure coming from the omnibus study, this meant that the contact was between May and October 2015

Figure 1: Proportion of customers who had contacted provider in the three months prior to the interview, by sector: 2009, 2011, 2012, 2013, 2014 and 2015



Q6. Thinking of [PROVIDER] and the services you buy from them, have you contacted them in the last 3 months by telephone, email, webchat or letter? (spontaneous responses, single coded) NB – Prior to 2014 respondents were only asked about contact by telephone or email, with contact by webchat or letter added in 2014 so data is not directly comparable *In 2011, two waves of research were conducted and the data shown relates to Q3
Base: All UK households who used each type of provider (In 2015 – 2925 Landline, 2669 Broadband, 3033 Mobile phone, 1827 Pay TV)
Source: Ofcom research, omnibus survey, fieldwork carried out by Saville Rossiter-Base in August, September and November 2015.

Indicates a significant increase/ decrease compared to 2014 at the 99% confidence level.

Proportion of complaints

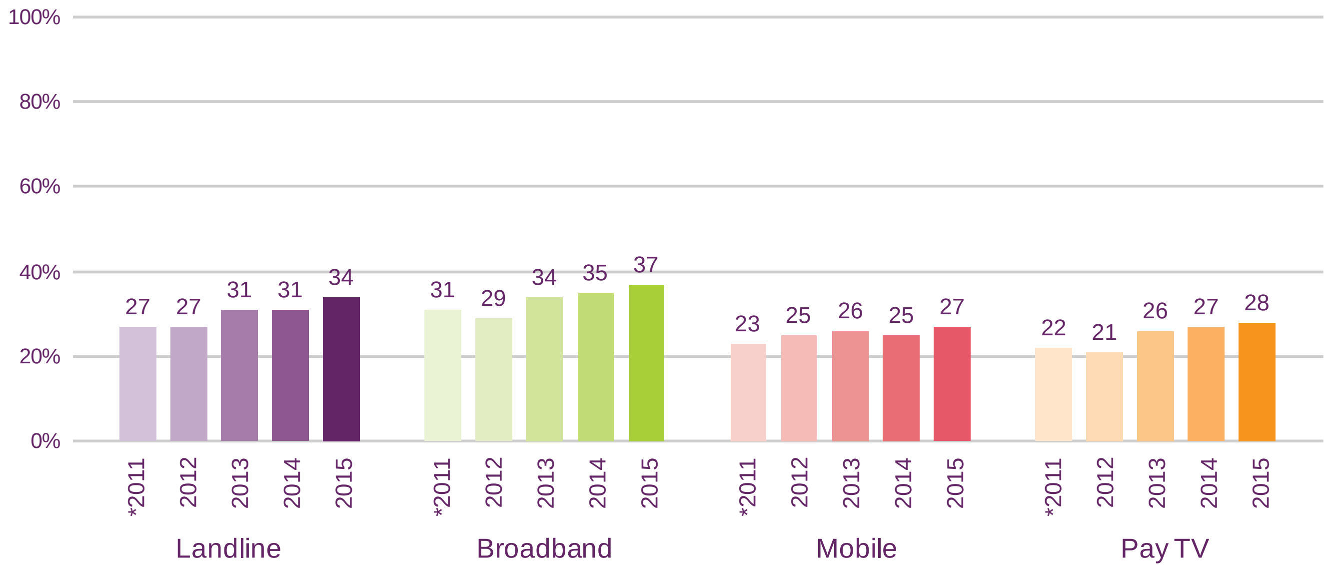
Levels of complaints were unchanged since 2014 for each service sector

Figure 2 shows the proportion of recent contacts with providers that were considered by customers to be complaints[8]. In 2015, across the four sectors, contacts considered to be complaints were at a similar level for each of mobile (27%) and pay TV (28%), and at a higher level for landline (34%) and broadband (37%).

Since 2014, the proportion of contacts that were considered to be complaints has not changed for any service sector, and the 2014 findings had also shown no change in the level of complaints since 2013.

Any change in the levels of satisfaction since 2014 among customers at an overall level cannot be said to be due to an increase or a decrease in the incidence of complaints.

Figure 2: Proportion of recent contacts with providers[9] considered by the customer to be a complaint, by sector: 2011-2015



Q5a. And in your opinion, was the reason for this contact with [PROVIDER] a complaint, or something else? (prompted responses, single coded) *In 2011, two waves of research were conducted and the data shown relates to Q3. Not asked in 2009.
Base: All UK households who contacted their provider about each type of service In 2015 – 1200 Landline, 1600 Broadband, 1600 Mobile phone, 1000 Pay TV)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015.
↑↓ Indicates a significant increase/ decrease compared to 2014 at the 99% confidence level.

[8] The question to establish whether the reason for contact was considered to be a complaint has only been included in the study since 2011, hence no data being shown for 2009
[9] With the data for this measure coming from the online study, this meant that the contact was between July and September 2015

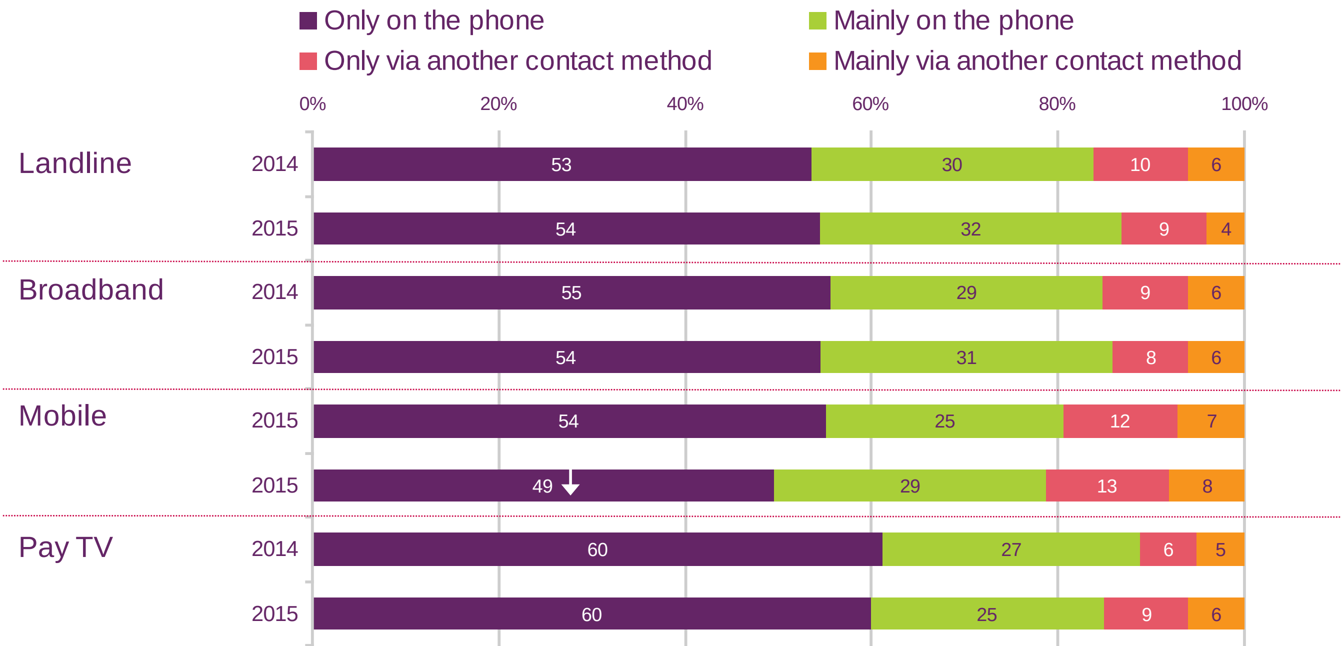
Type of contact with provider

In 2015, the majority of contact with suppliers was by phone

Customers in contact with their provider in the three months prior to the interview were asked to say how they made contact most recently[10], as shown in Figure 3. The majority of contact for landline, broadband and Pay TV was made by phone only, with around one in ten customers only making contact by email, webchat or letter. Mobile customers in 2015 were less likely compared to 2014 to only make contact by phone (49% vs. 54%), but this was still the method most likely to be used.

In 2015, pay TV customers (60%) were more likely than landline and broadband customers (both 54%) and mobile customers (49%) to say they had only made contact by phone. This was also the case in 2014.

Figure 3: Type of contact made most recently, by sector: 2015



Q2. In dealing with [PROVIDER] about this did you contact them only on the phone, mainly on the phone, only via another contact method (email, webchat or letter) or mainly via another contact method (email, webchat or letter)? (prompted responses, single coded)
Base: All UK households who contacted their provider about each type of service (In 2015 – 1200 Landline, 1600 Broadband, 1600 Mobile phone, 1000 Pay TV) – Note: Remaining percentages are 'Don't know' responses
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015.

↑↓ Indicates a significant increase/ decrease compared to 2014 at the 99% confidence level.

[10] Prior to 2014, contact with communications providers was required to be made by phone or email. The options for the method of contact were extended from 2014 to cover contact by webchat or by letter, as such results prior to 2014 are not directly comparable

Reason for recent contact with provider

Contact with mobile and landline providers was most likely to be about a general issue

Customers were prompted with a list of seven possible reasons for contacting their provider and asked to say which one reason applied to their most recent contact. These seven possible responses were then grouped into three distinct categories: a billing issue, a fault or repair issue, or a general enquiry issue.

The reasons within each type of issue are shown below:

BILLING
- A billing, pricing or payment issue
- A problem with your account details, for example name and address etc.

FAULT/REPAIR
- A fault with the service you are buying from them, for example total or partial failure of service
- The service not performing as well as expected, for example issues with picture quality, broadband speed, mobile coverage etc.
- Problems with the repair service, for example it didn't happen or didn't solve the problem

GENERAL ISSUE
- A problem relating to the installation or set up of your service
- Or something else, a general issue

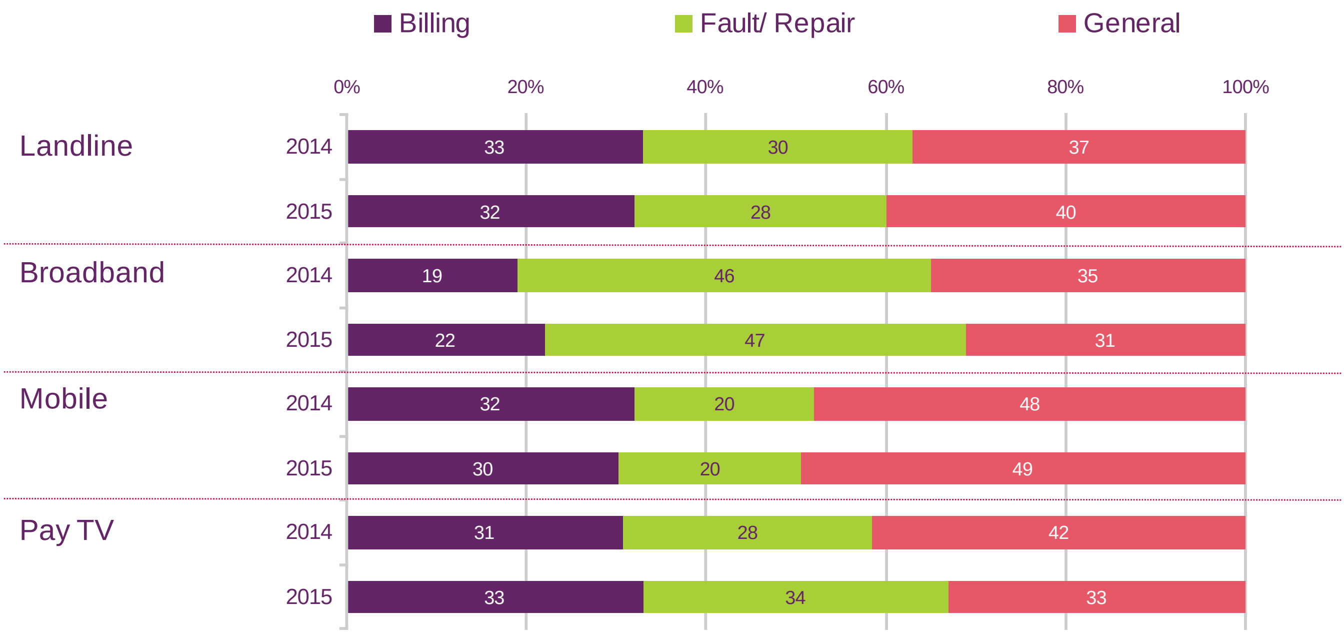
Figure 4 shows the type of issue that customers most recently contacted their provider about in 2015, with results from 2014 also shown.

Contact with customer services in the mobile sector was most likely to be about a general issue (49%) and was least likely to be about a fault/ repair issue (20%). Contact with customer services in the landline sector was also most likely to be about a general issue (40%).

For the pay TV sector, no type of issue dominated; with broadly equal levels of contact regarding billing (33%), fault/ repair (34%) and general enquiries (33%). Broadband contact differed from the other sectors in that contact about a fault/ repair issue was the most likely (47%), followed by contact about a general issue (31%), with contact about a billing issue least likely (22%).

Compared to 2014 there were no significant changes in any of the sectors in terms of the type of issue prompting contact from customers.

Figure 4: Type of issue for most recent contact, by sector: 2014 and 2015[11]



Q8. Thinking of the most recent issue you had to contact [PROVIDER] about, which one of the following categories did the issue fall into? Was it to do with..... ? (prompted responses, single coded)
Base: All UK households who contacted their provider about each type of service (In 2015 – 336 Landline, 488 Broadband, 551 Mobile phone, 307 Pay TV)
Source: Ofcom research, omnibus survey, fieldwork carried out by Saville Rossiter-Base in August, September and November 2015.
↑↓ Indicates a significant increase/ decrease compared to 2014 at the 99% confidence level.

Issue resolution by provider

Half or more of customers contacting providers about a general enquiry had their issue resolved in one contact

Those that had contacted their provider in the three months prior to the interview were asked the extent to which they felt the issue had been resolved. Respondents were asked to state whether they considered the issue had been fully resolved, partially resolved or was still unresolved.

Figure 5 shows the proportions in 2015 who considered their issue was completely resolved[12] in one contact[13] by issue type for each type of provider. Equivalent findings from 2014 are shown for comparison.

In 2015, as was also the case in 2014, half or more of contacts about a general enquiry across all types of sectors resulted in the issue being completely resolved in that initial contact, as far as the customer

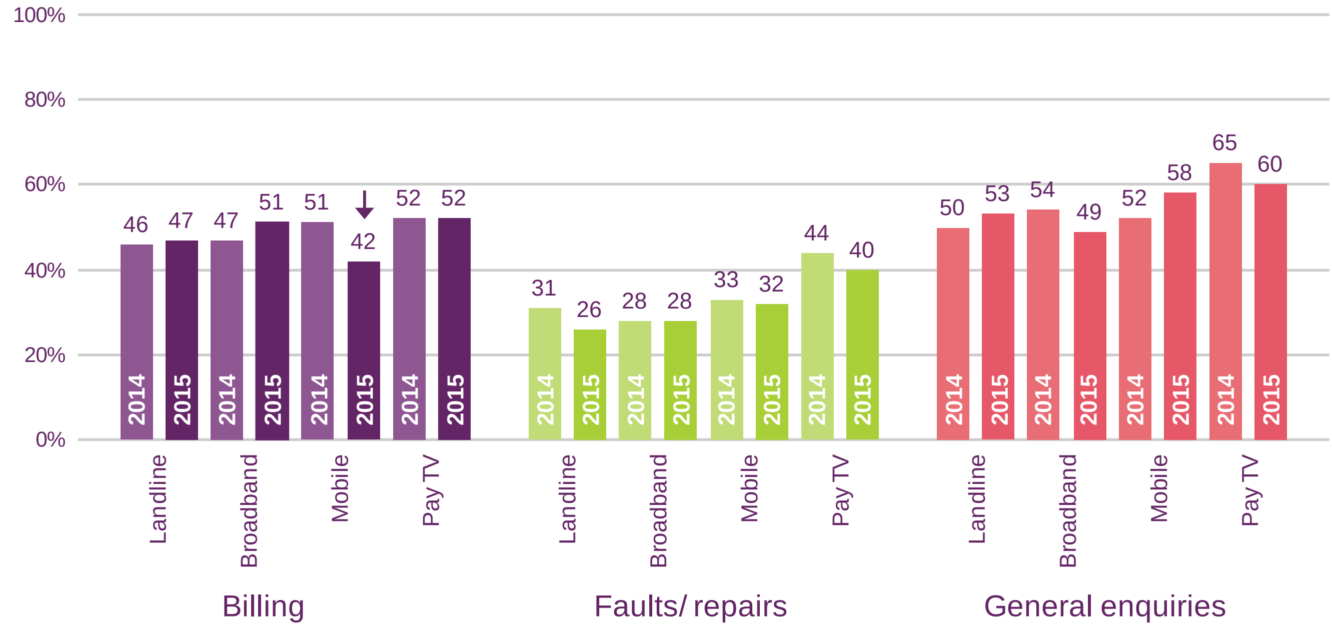
[11] The results in Figure 4 excluded those providers covered in the Stage 1 omnibus survey that were not subsequently covered in the Stage 2 online survey (because fewer than 35 interviews were conducted with customers making contact with the provider in the previous three months)
[12] It was decided in 2013 to report on complete resolution only as issues that are 'partly' resolved may go on to be completely resolved or may remain only partly resolved
[13] Since 2014 it was decided to report on those who had their issue resolved in one contact (as opposed to those who felt their issue was resolved across several contacts) as this would not be influenced by the date of their initial contact (which could have been anytime between July and September 2015)

was concerned. Around half of contacts about a billing issue across each type of sector apart from mobile also had their issue resolved in one contact. In contrast, fewer than half of contacts about a fault/ repair issue felt their issue was resolved in one contact, across each sector.

For those making contact with a landline, mobile or pay TV provider, contact about a general issue was significantly more likely to be resolved in one contact than was contact about a billing issue or a fault/ repair issue in 2015. For those making contact with a broadband provider, billing issues and general issues were no more or less likely to be resolved in one contact. For each sector, contact about a fault/ repair issue was less likely to be completely resolved in one contact.

Compared to 2014, mobile providers were less likely to have resolved billing enquiries in one contact (42% vs. 51% in 2014).

Figure 5: Whether the issue that the customer contacted their provider about was considered to be completely resolved in one contact, by sector: 2014 and 2015



Q5. In your opinion, was [PROVIDER] able to successfully resolve your issue [BILLING/ FAULT/ GENERAL ENQUIRY]? (spontaneous responses, single coded)
Base: All UK households who contacted their provider about each type of issue (In 2015 – For billing 504 Landline, 486 Broadband, 611 Mobile, 362 Pay TV, for faults/ repairs 345 Landline, 706 Broadband, 377 Mobile, 346 Pay TV, for general enquiries 351 Landline, 408 Broadband, 612 Mobile, 292 Pay TV)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015.
↑↓ Indicates a significant increase/ decrease compared to 2014 at the 99% confidence level.

Time taken to resolve

The majority of customers who contacted providers resolved their issue in less than one hour, with this being more likely for Mobile and Pay TV providers

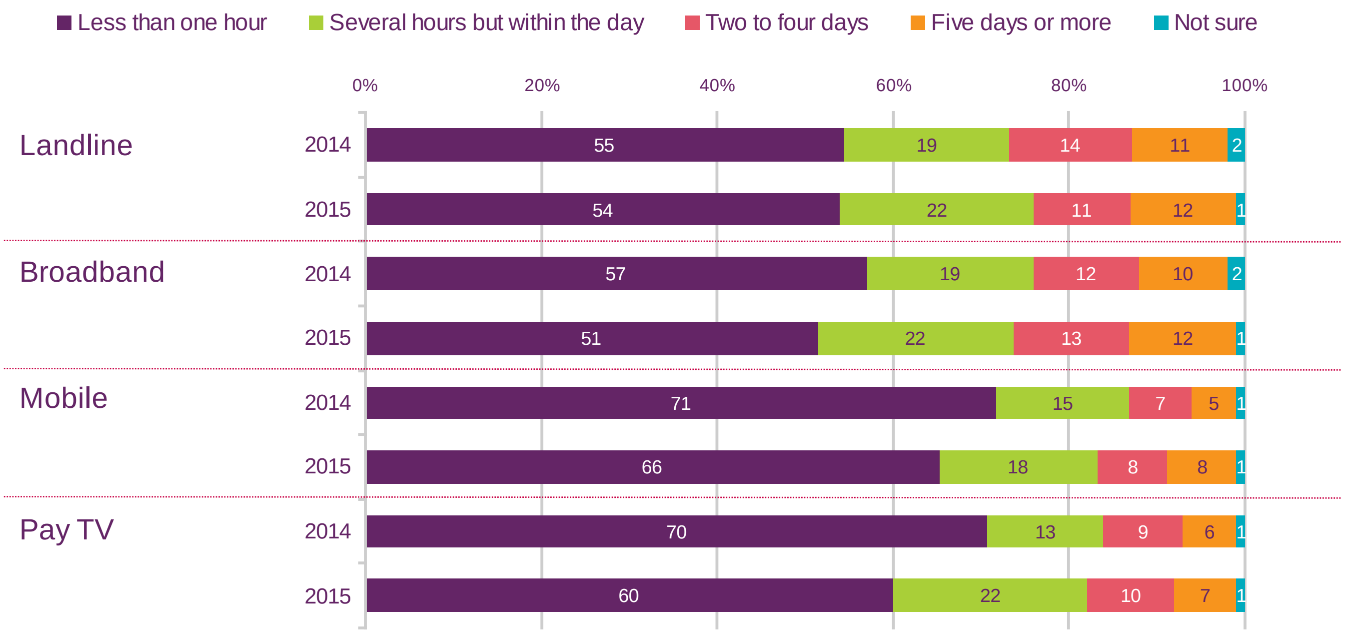
Customers who considered their issue to be completely resolved were asked how long it had taken to resolve the issue with their provider. Figure 6 shows the percentage of customers saying that issue resolution had taken less than one hour, several hours but within one day, from two to four days, or five days or more in 2015. Findings from 2014 are shown for comparison.

The majority of those making contact with their provider said that the time taken to resolve their issue was less than one hour (66% mobile, 60% pay TV, 54% landline and 51% broadband). Around one in ten (12%) or fewer said the time taken was five days or more.

Mobile and pay TV providers were more likely to resolve the issue in less than one hour compared to landline and broadband providers, and this was also the case in 2014.

As shown earlier in Figure 4, contact with mobile and landline providers in 2015 was most likely to be a general enquiry, while contact with a pay TV provider was more equally distributed across the three types of enquiry compared to other sectors. Contact with a broadband provider was most likely a fault/ repair enquiry.

Figure 6: Time taken to resolve the issue, by sector: 2014 and 2015



Q10. How long did it take to resolve the issue with [PROVIDER]? (prompted responses, single coded)
Base: All UK households who contacted their provider about each type of service whose issue was completely resolved (In 2015 – 818 Landline, 1035 Broadband, 1100 Mobile phone, 711 Pay TV).
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015.
↑↓ Indicates a significant increase/ decrease compared to 2014 at the 99% confidence level.

Satisfaction with provider's customer service

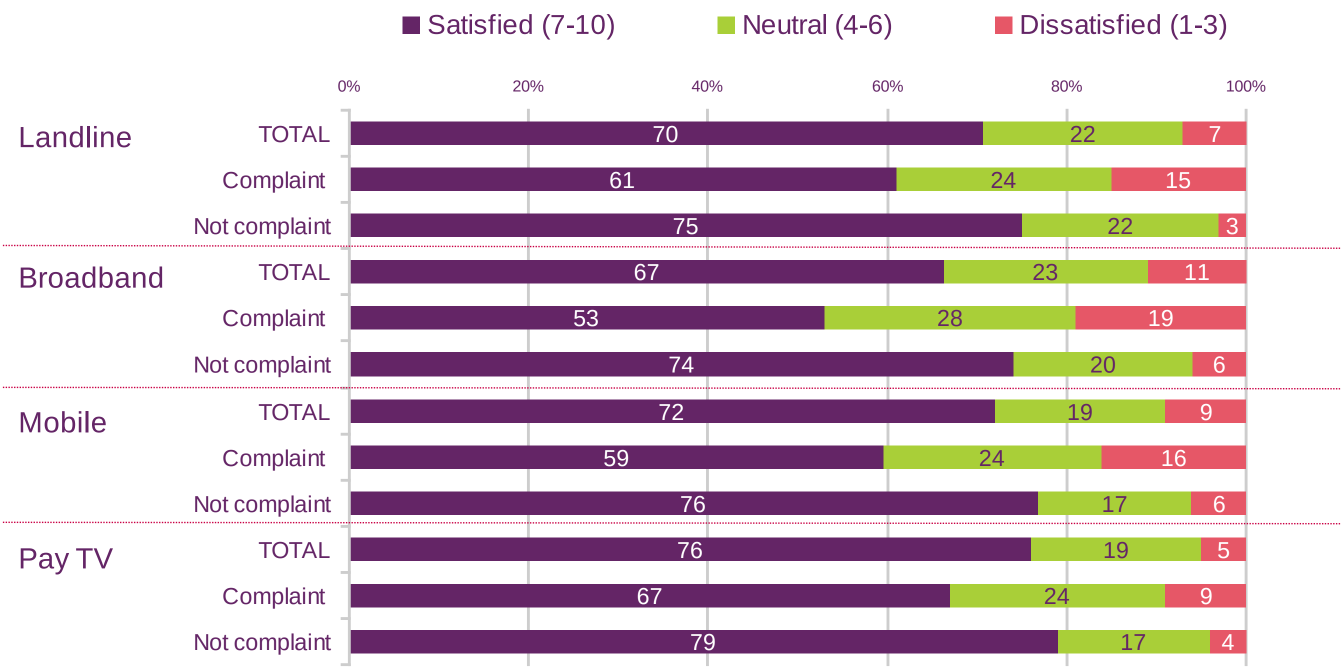
The majority of customers were satisfied with the service received from their provider, but satisfaction remained lower for those making a complaint

Customers who had contacted their provider (either by phone, email, webchat or letter) in the three months prior to the interview were asked to rate their satisfaction with the customer service they received using a 10 point scale; where 10 is extremely satisfied and 1 is extremely dissatisfied.

Figure 7 shows the percentage of customers stating that they were satisfied (giving a rating of 7-10), neutral (4-6) or dissatisfied (1-3) with the service they received in 2015. The majority of all customers in each sector were satisfied with the customer service received. Those making contact with their pay TV provider were the most likely to be satisfied (76%), while around seven in ten making contact with their landline provider (70%), broadband provider (67%) or mobile provider (72%) were satisfied with the customer service received.

Satisfaction among those who made contact with a complaint was significantly lower than the average for each of the sectors, with between 53% and 67% of customers making contact with a complaint reporting that they were satisfied with the service received.

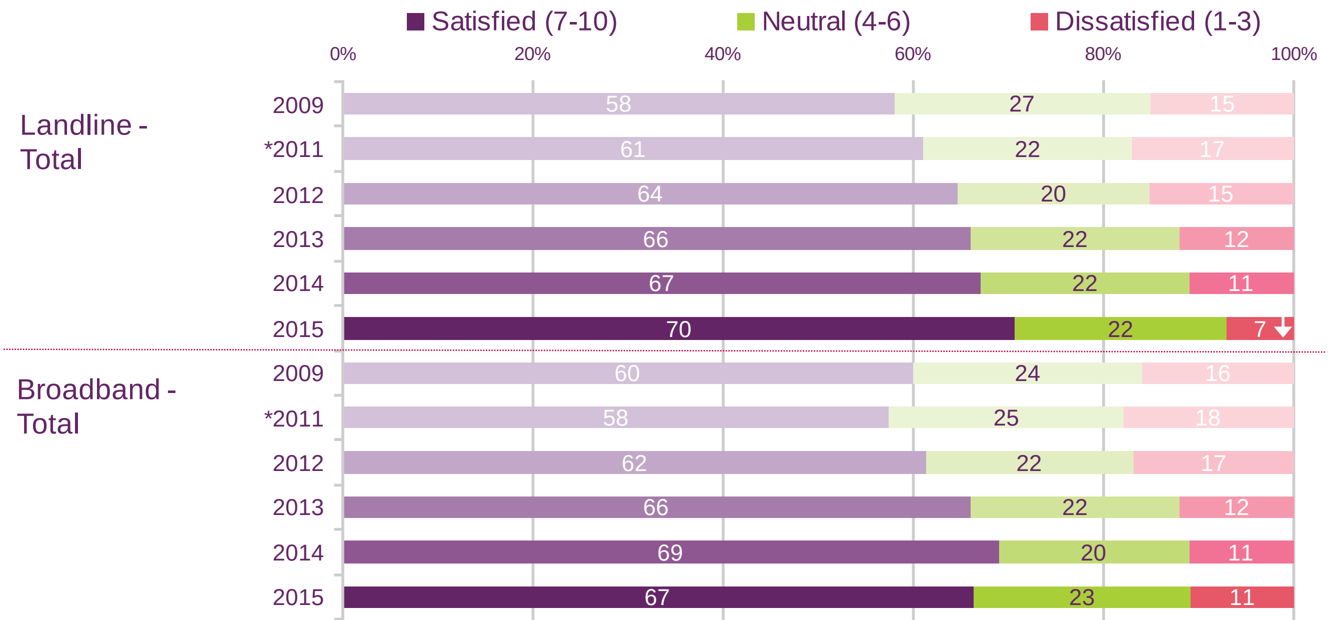
Figure 7: Satisfaction with customer service, by sector: 2015



Q3. Overall, how satisfied are you with the service you received from [PROVIDER] customer services on this occasion? (prompted responses, single coded)
Base: All UK households who contacted their provider about each type of service (Total/ Complaint/ Not complaint) - Landline (1200/ 455/ 755) Broadband (1600/ 603/ 997), Mobile (1600/ 473/ 1127) Pay TV (1000/ 291/ 709).
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015

Figure 8 and Figure 9 show the extent of satisfaction with the customer service received in each of the four sectors from 2009 to 2015. Compared to 2014 there was one change: a decrease in dissatisfaction among those making contact with their landline provider (7% vs. 11% in 2014). Otherwise there were no changes in satisfaction in any sector.

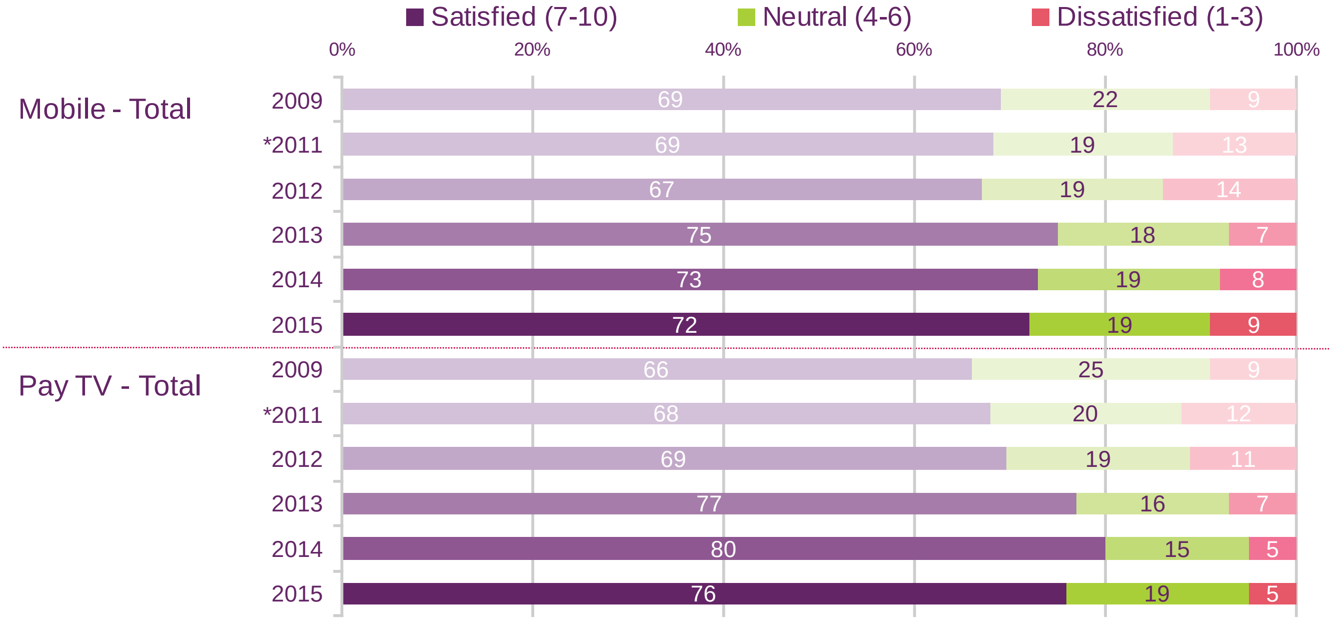
Figure 8: Satisfaction with customer service, by sector (landline and broadband): 2009, 2011, 2012, 2013, 2014 and 2015



Q3. Overall, how satisfied are you with the service you received from [PROVIDER] customer services on this occasion? (prompted responses, single coded). *In 2011, two waves of research were conducted and the data shown relates to Q3
Base: All UK households who contacted their provider about each type of service (1200 Landline, 1600 Broadband in 2015)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015

↑↓ Indicates a significant increase/ decrease compared to 2014 at the 99% confidence level.

Figure 9: Satisfaction with customer service, by sector (mobile phone and pay TV): 2009, 2011, 2012, 2013, 2014 and 2015



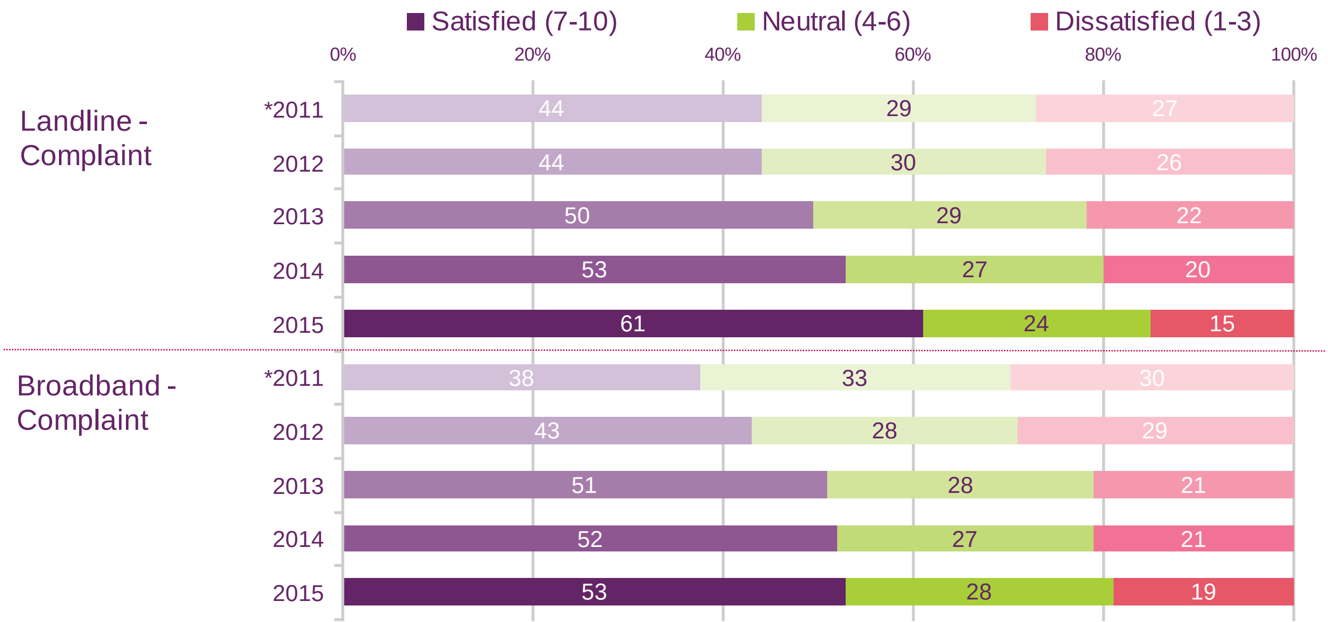
Q3. Overall, how satisfied are you with the service you received from [PROVIDER] customer services on this occasion? (prompted responses, single coded) *In 2011, two waves of research were conducted and the data shown relates to Q3
Base: All UK households who contacted their provider about each type of service (1600 Mobile, 1000 Pay TV in 2015).
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015.

↑↓ Indicates a significant increase/ decrease compared to 2014 at the 99% confidence level.

Satisfaction with the customer service received among those who contacted their provider with a complaint was unchanged from 2014 for each sector.

Figure 10 and Figure 11 look at the trend in satisfaction with the customer service received among those making contact with a complaint in each of the four sectors from 2011 to 2015 (this was not asked in 2009). Compared to 2014 there were no changes in satisfaction in any sector.

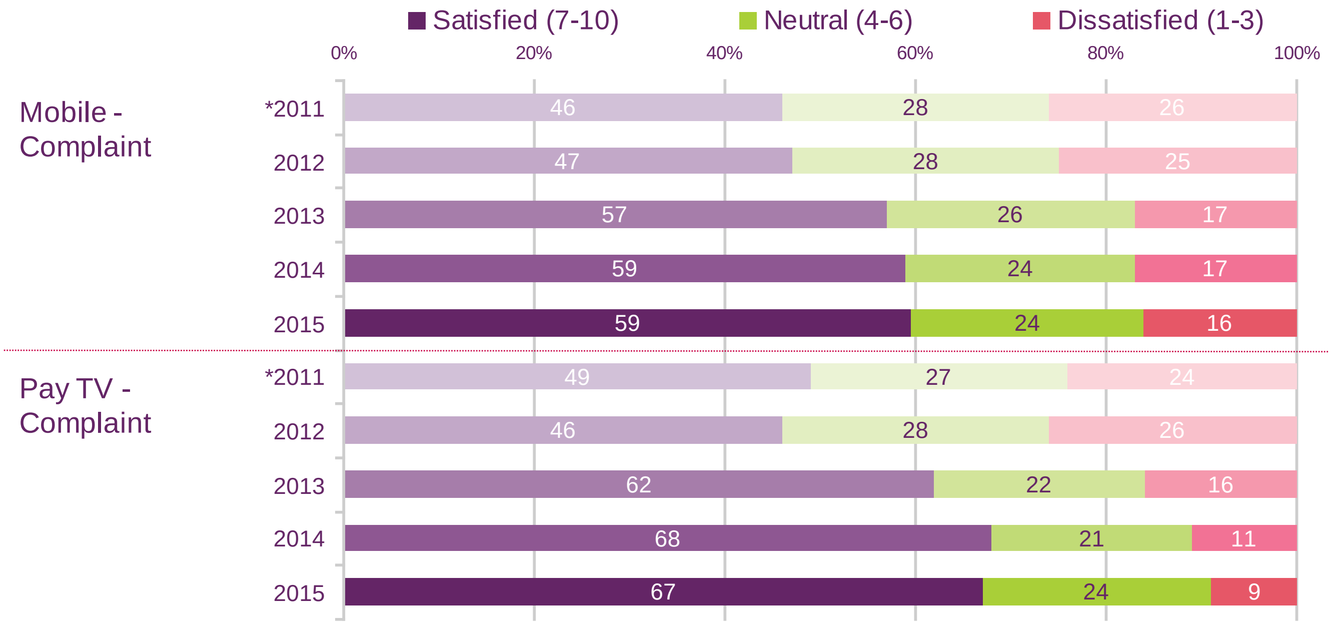
Figure 10: Satisfaction with customer service among those who contacted with a complaint, by sector (landline and broadband): 2011-2015



Q3. Overall, how satisfied are you with the service you received from [PROVIDER] customer services on this occasion? (prompted responses, single coded) *In 2011, two waves of research were conducted and the data shown relates to Q3. Not asked in 2009.
Base: All UK households who contacted their provider about a complaint for each type of service (445 Landline, 603 Broadband in 2015).
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015.

↑↓ Indicates a significant increase/ decrease compared to 2014 at the 99% confidence level.

Figure 11: Satisfaction with customer service among those who contacted with a complaint, by sector (mobile phone and pay TV): 2011-2015



Q3. Overall, how satisfied are you with the service you received from [PROVIDER] customer services on this occasion? (prompted responses, single coded). *In 2011, two waves of research were conducted and the data shown relates to Q3. Not asked in 2009.
Base: All UK households who contacted their provider about a complaint for each type of service (473 Mobile, 291 Pay TV in 2015).
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015.

↑↓ Indicates a significant increase/ decrease compared to 2014 at the 99% confidence level.

Section 4

Landline sector

This section looks in detail at the landline sector[14]. It shows, where possible, how each provider included (BT, Sky, TalkTalk and Virgin Media) performed against key measures such as:

- incidence of contact about landline
- incidence of complaints
- issue type
- whether the issue was completely resolved
- time taken to resolve the issue
- satisfaction with customer service
- future use based on customer service experience

For each measure this section shows how the provider performed in 2015 against the overall landline sector average. This section also shows, where possible, how the sector average and the provider-specific measures in 2015 compared to those in 2014. The longer term trend is also reported, where appropriate. Inclusion in this research did not necessarily mean a high level of complaints.

Where we report a provider's position as in line with the sector average, we mean there is no statistically significant difference between that average and that provider. There may, nonetheless, be statistically significant differences between providers whose positions are reported as each in line with the sector average.

References in this section of the report relating to all landline providers collectively relate to those landline providers included in this 2015 study (i.e. BT, Sky, TalkTalk and Virgin Media). These same providers were included in the 2014 study.

Recent contact with provider

Compared to 2014, there has been no overall change in the proportion of customers who contacted their landline provider

Figure 12 shows the proportion of customers that had made contact (by telephone, email, webchat or letter)[15] in the three months prior to the interview[16], with any of the four landline providers. This contact

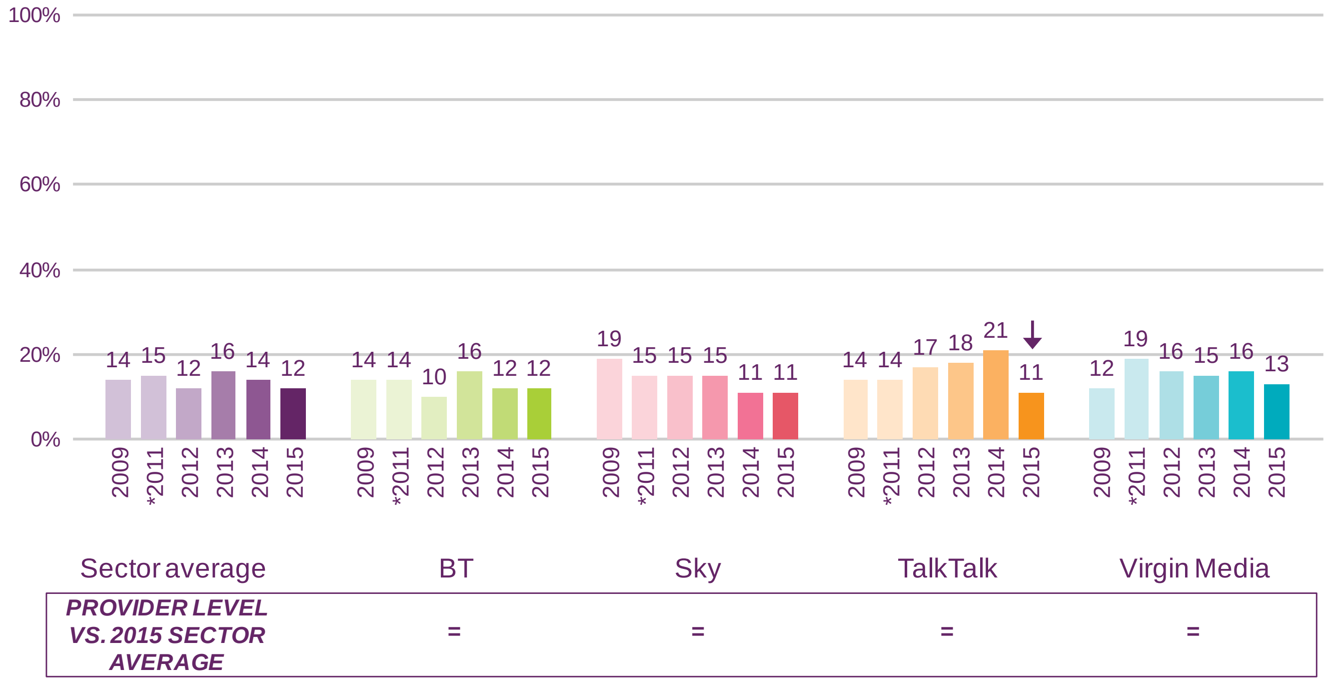
[14] In 2015 and in 2014 respondents were asked about their provider for their landline telephone service and/ or line rental (in case they used more than one provider). Prior to 2014, they had only been asked about their provider for household landline telephone calls
[15] Prior to 2014 respondents were only asked about contact by telephone or email, with contact by webchat or letter added in 2014, so data from 2013 and earlier is not directly comparable
[16]With the data for this measure coming from the omnibus study this meant that the contact was between May and October 2015

was either regarding a specific issue relating to their landline or a more general issue that applied to all the services they may take with that provider[17].

In 2015, one in eight (12%) of all UK households who used one of the four landline providers had contacted their provider in the three months prior to the interview. In 2015, this measure did not differ by provider compared to the sector average[18].

There was no change in the level of contact to the landline sector overall in 2015 (12% in 2014 vs. 14% in 2015). There was one change from 2014 for the individual providers: a decrease in the incidence of contact among TalkTalk customers (11% vs. 21% in 2014).

Figure 12: Proportion of customers who contacted their landline provider in the three months prior to the interview: 2009, 2011, 2012, 2013, 2014 and 2015



Q6. Thinking of [PROVIDER] and the services you buy from them, have you contacted them in the last 3 months by telephone, email, webchat or letter? (spontaneous responses, single coded) NB – Prior to 2014 respondents were only asked about contact by telephone or email, with contact by webchat or letter added in 2014 so data is not directly comparable *In 2011, two waves of research were conducted and the data shown relates to Q3
Base: All UK households who used landline providers (In 2015 – 2925 Total, 1206 BT, 661 Sky, 435 TalkTalk, 623 Virgin Media).
Source: Ofcom research, omnibus survey, fieldwork carried out by Saville Rossiter-Base in August, September and November 2015.
↑↓ Indicates a significant increase/ decrease compared to 2014 at the 99% confidence level.

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[17] So for example, if a customer has their landline and broadband service provided by BT and they did not say their most recent contact was regarding the landline specifically, then they were asked whether it was a general issue that applies to both their landline and broadband service

[18] This is indicated by the '=' symbols appearing for each provider in the box below the chart within Figure 12. This convention is included across several of the Figures in this and subsequent sections. If in 2015, for a given measure a provider performed better than the sector average the box below the chart will show *'HIGHER'* for that particular provider and if a provider performed worse then it will show *'LOWER'*

Proportion of complaints

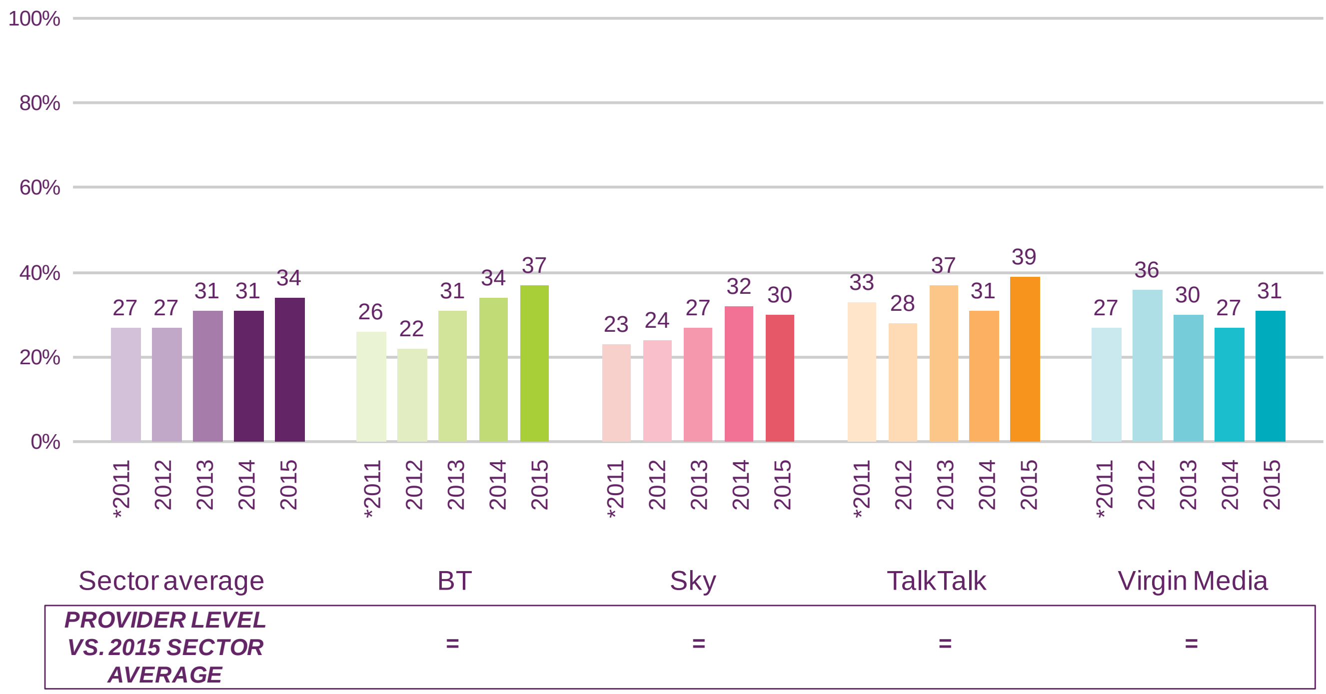
There was no change in the proportion of contacts with landline providers considered to be complaints

Since 2011[19], we have asked those customers identified as having contacted their landline provider in the previous three months[20] whether they considered the reason for this contact to be a complaint[21]. Figure 13 shows that overall three in ten contacts (34%) were considered to be complaints. As with overall contact (shown in Figure 12), this incidence did not vary in 2015 for any of the four providers compared to the sector average.

There has also been no change since 2014 in the proportion of contacts considered to be complaints for the landline sector overall (34% in 2015 and 31% in 2014) or for any of the four landline providers shown.

Any change in the levels of satisfaction since 2014 among landline customers at an overall level or among customers of any particular provider cannot be said to be due to an increase or decrease in the incidence of complaints.

Figure 13: Proportion of recent contacts with landline providers considered by the customer to be a complaint: 2011-2015



Q5a. And in your opinion, was the reason for this contact with [PROVIDER] a complaint, or something else? (prompted responses, single coded) *In 2011, two waves of research were conducted and the data shown relates to Q3. Not asked in 2009.
Base: All UK households who contacted their landline provider (In 2015 – 1200 Total, 300 BT, 301 Sky, 300 TalkTalk, 300 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015.
↑↓ Indicates a significant increase/ decrease compared to 2014 at the 99% confidence level.

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[19] The question to establish whether the reason for contact was considered to be a complaint was only included in the study since 2011, hence no data is shown for 2009
[20] With the data for this measure coming from the online study this meant that the contact was between July and September 2015
[21] Respondents were not prompted with a definition of a complaint, this was therefore self-defined by the respondent

Most recent contact by issue type

There was no change from 2014 in the type of issue that customers contacted their landline provider about

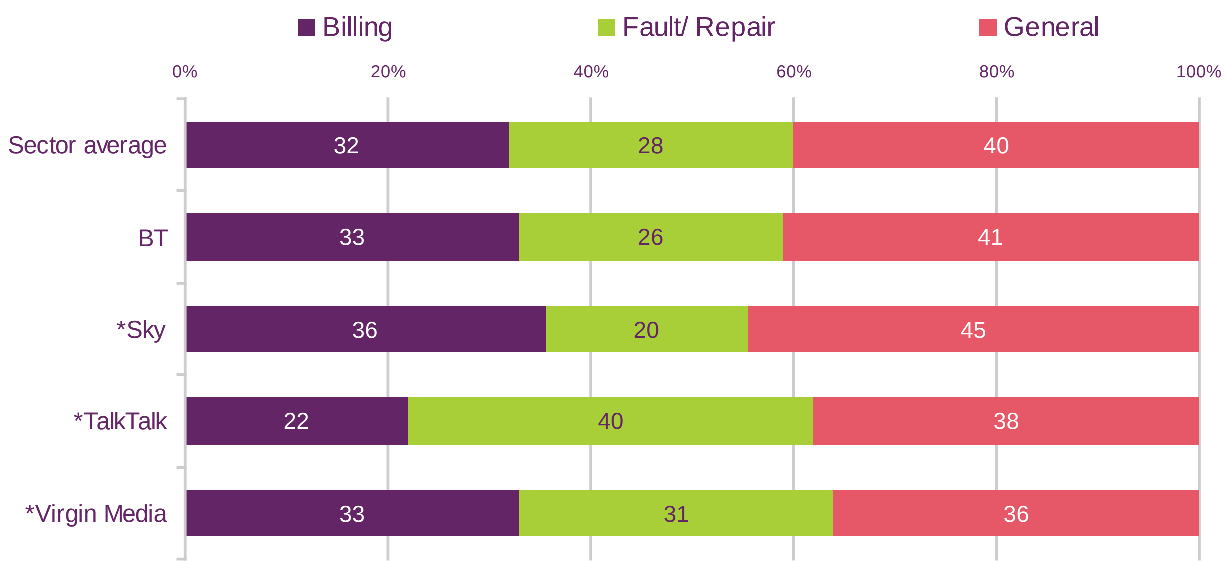
Customers were prompted with a list of seven possible reasons for contacting their landline provider and asked to say which one reason applied to their most recent contact. These seven possible responses were then grouped into three distinct categories: a billing issue, a fault or repair issue or a general enquiry issue.

Figure 14 shows the incidence of the three types of issue in 2015. Across all landline providers included in this report, four in ten contacts (40%) related to a general enquiry, with around three in ten (32%) contacts related to a billing issue, and around three in ten (28%) about a fault or repair. In the landline sector overall it was therefore less common for recent contact to be about a fault/ repair or about a billing issue than about a general issue.

There were no differences among BT, Sky, TalkTalk or Virgin Media customers compared to the overall sector average[22].

While not shown in Figure 14, from 2014, where base sizes allow the comparison, there was no change in the type of issue that landline providers were contacted about.

Figure 14: Type of issue for most recent contact with landline provider: 2015



Q8. Thinking of the most recent issue you had to contact [PROVIDER] about, which one of the following categories did the issue fall into? Was it to do with..... ? (prompted responses, single coded) *Caution: Base below 100,
Base: All UK households who contacted their landline provider (In 2015 – 336 Total, 126 BT, 76 Sky, 51 TalkTalk, 83 Virgin Media)
Source: Ofcom research, omnibus survey, fieldwork carried out by Saville Rossiter-Base in August, September and November 2015
↑↓ Indicates significantly higher/ lower than sector average at the 99% confidence level.

[22] The number of interviews conducted on the omnibus study among Sky, TalkTalk and Virgin Media landline customers who made contact with their provider was between 50 and 100 interviews and should therefore be treated as indicative only.

Key issues by contact type

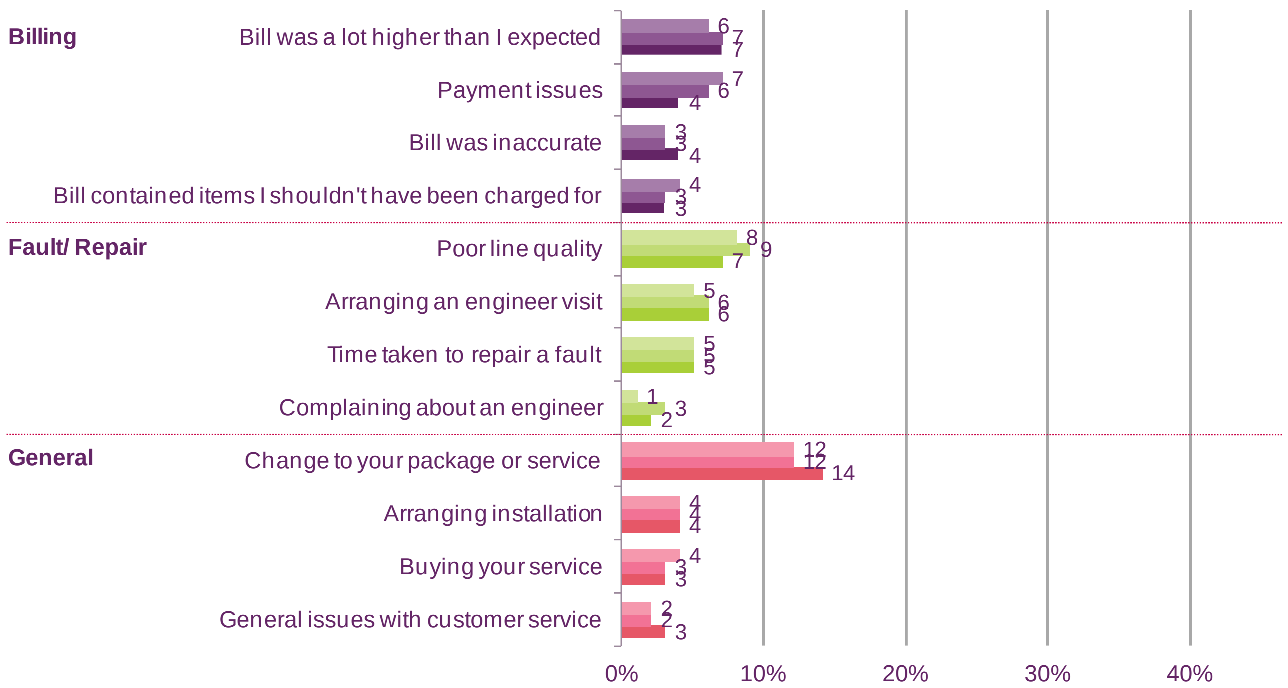
The most common reason for contacting the landline provider was to make a change to the package or service as in both 2013 and 2014

Figure 15 shows the top four reasons for recent contact with service providers, by issue type[23]. No single reason accounted for a majority of contacts from landline customers to their provider in 2015, as had also been the case in 2014 and 2013.

The most commonly mentioned reason for contacting their provider was to make a change to their package or service (14%) in terms of upgrading or downgrading it, followed by making contact about poor line quality (7%), their bill being a lot higher than expected (7%) or to arrange an engineer visit (6%).

There were no significant changes compared to 2014.

Figure 15: Landline – Top 4 issues per contact type: 2013-2015



S7a-c. And more specifically, which of the following best describes what the issue with [PROVIDER] was concerning? (prompted responses, single coded)
Base: All UK households who contacted their landline provider (In 2013 – 1204 Total, In 2014 – 1201 Total, In 2015 – 1200 Total)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015
↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level.

[23] Respondents were shown a different list of reasons to choose from dependent on whether they said their most recent contact was regarding a billing, fault and repair or general issue. To enable a comparison the data in Figure 15 was expressed as a proportion of all those that had contacted their landline provider in the 3 months prior to the interview (July to September 2015)

Number of contacts

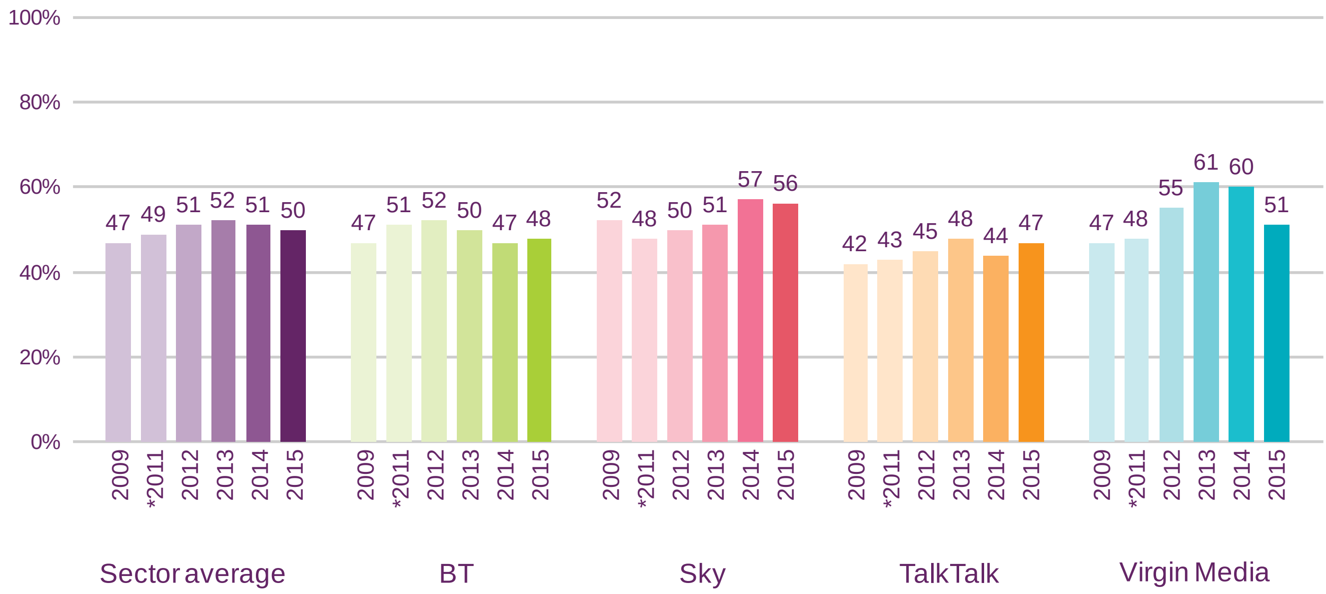
Half of those contacting their landline provider only made contact on one occasion – as was the case in 2014

Customers were asked how many times they had been in contact, so far, with their landline provider about their most recent issue. Figure 16 shows the proportion that had only been in contact once with their landline provider, at an overall sector level and by provider (between 2009 and 2015).

Half (50%) of customers contacting any landline provider only made contact on one occasion, and this measure was unchanged from 2014 and has remained consistent since 2009. There was also no change in this incidence since 2014 for any individual landline provider. In 2015, no provider's customers are more or less likely compared to the sector overall to say they had only made contact on one occasion. In 2014 and 2013, Virgin Media customers had been more likely to have made contact once compared to the sector overall.

Although not shown in Figure 16, those customers who did not feel their issue was a complaint were more likely to have contacted their landline provider only once compared to those making contact with a complaint (57% vs. 36% for those with a complaint). This was also true in 2014.

Figure 16: Proportion in contact with the provider once about their most recent issue – landline: 2009, 2011, 2012, 2013, 2014 and 2015



PROVIDER LEVEL VS. 2015 SECTOR AVERAGE	=	=	=	=

Q6. How many times have you been in contact with [PROVIDER] in relation to this particular issue so far? (prompted responses, single coded) *In 2011, two waves of research were conducted and the data shown relates to Q3
Base: All UK households who contacted their landline provider (In 2015 – 1200 Total, 300 BT, 300 Sky, 300 TalkTalk, 300 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015.

↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level.

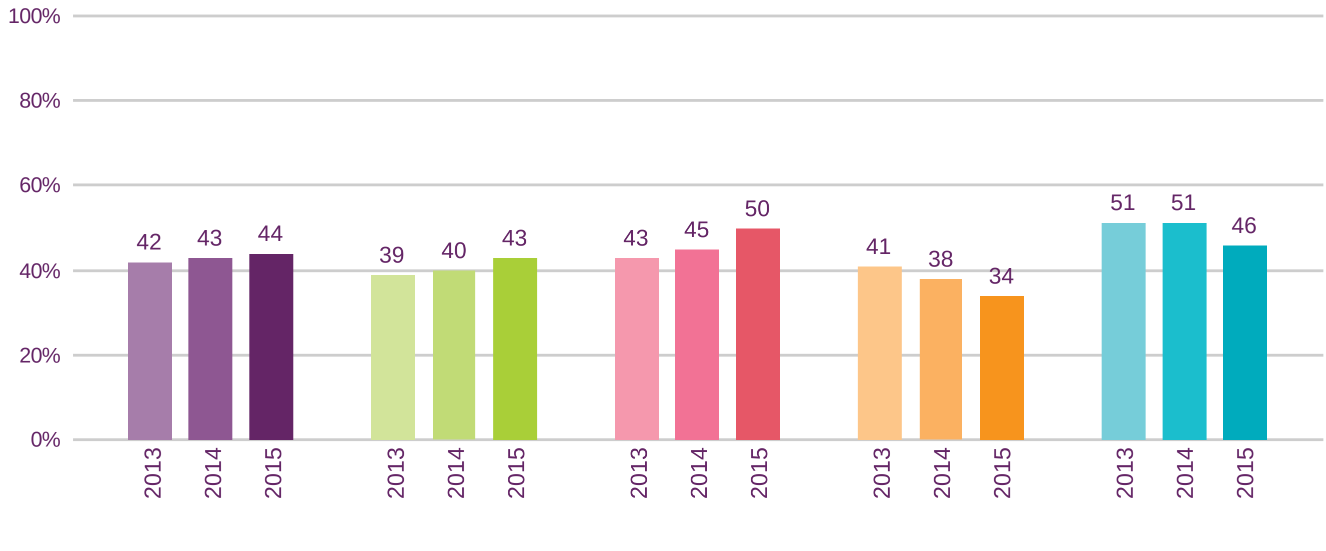
Issue resolution

Four in ten who contacted their landline provider recently had their issue completely resolved in one contact

Those that had contacted their landline provider were asked the extent to which they felt the issue had been resolved. Respondents were given the choice of whether the issue had been fully resolved, partially resolved or if it was still unresolved (as defined by the respondent). Figure 17 shows the proportions in 2013, 2014 and 2015 who had been in contact with their provider who considered their issue completely resolved[24] in one contact[25].

In 2015 around four in ten customers who recently contacted their landline provider considered their issue completely resolved in their first contact (44%) and this incidence has not changed from 2014 for the overall sector average or for each of the four providers. In 2015, TalkTalk customers were less likely than the sector overall to say their issue was completely resolved in one contact (34% vs. 44%).

Figure 17: Proportion whose issue was completely resolved in one contact – landline: 2013-2015



	Sector average	BT	Sky	TalkTalk	Virgin Media
PROVIDER LEVEL VS. 2015 SECTOR AVERAGE		=	=	***LOWER***	=

Q6. How many times have you been in contact with [PROVIDER] in relation to this particular issue so far? (prompted responses, single coded)
Base: All UK households who contacted their landline provider (In 2015 – 1200 Total, 300 BT, 300 Sky, 300 TalkTalk, 300 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015.
↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level.

[24] It was decided since 2013 to report on complete resolution only as issues that are 'partly' resolved may go on to be completely resolved or may remain only partly resolved
[25] Since 2014 it was decided to report on those who had their issue resolved in one contact (as opposed to those who felt their issue was resolved across several contacts) as this would not be influenced by the date of their initial contact (which could have been anytime between July and September 2015)

Around half of landline customers who contacted about a billing or general enquiry felt their issue was completely resolved in one contact

Figure 18 shows the proportion of those in 2014 and 2015 who contacted their landline provider in the three months prior to the interview with a billing or fault/ repair or a general enquiry issue, and considered this issue completely resolved in one contact.

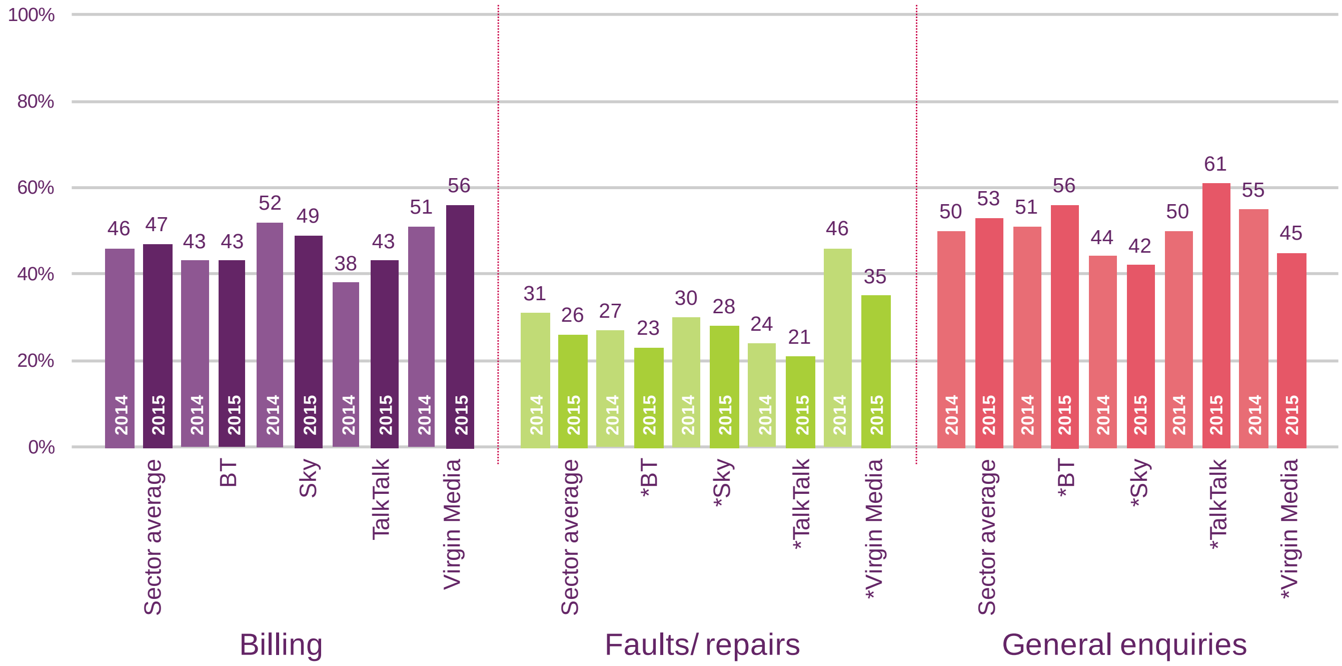
In 2015, around half of customers (53%) who contacted their landline provider with a general enquiry felt their issue had been completely resolved in one contact. Just under half of customers who contacted about a billing enquiry (47%) and around one quarter who contacted about a fault/ repair (26%) felt their issue had been resolved as a result of their first contact. As such, faults/ repairs were the issue that were least likely to be completely resolved with one contact – as in 2014.

In 2015, no individual provider performed better or worse than the sector average for a billing, fault/ repair or a general enquiry issue.

Compared to 2014, there was no change in the proportion of customers who felt their issue had been completely resolved in one contact for the landline sector overall or for any of the providers for any of the three issue types.

While not shown in Figure 18, those that contacted their landline provider with a complaint were less likely to feel their issue was completely resolved in one contact (31%) compared to those who did not consider their issue a complaint (51%). This was also the case in 2014.

Figure 18: Landline - Whether the issue that the customer contacted their provider about was considered to be completely resolved in one contact, by provider: 2014 and 2015



Q5. In your opinion, was [PROVIDER] able to successfully resolve your issue [BILLING/ FAULT/ GENERAL ENQUIRY]? (spontaneous responses, single coded) *Caution: Base below 100
Base: All UK households who contacted their landline provider about each type of issue (In 2015 – For billing 504 Total, 131 BT, 111 Sky, 140 TalkTalk, 122 Virgin Media, for faults/ repairs 345 Total, 78 BT, 97 Sky, 77 TalkTalk, 93 Virgin Media, for general enquiries 351 Total, 91 BT, 92 Sky, 83 TalkTalk, 85 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015.

↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level.

Time taken to resolve the issue

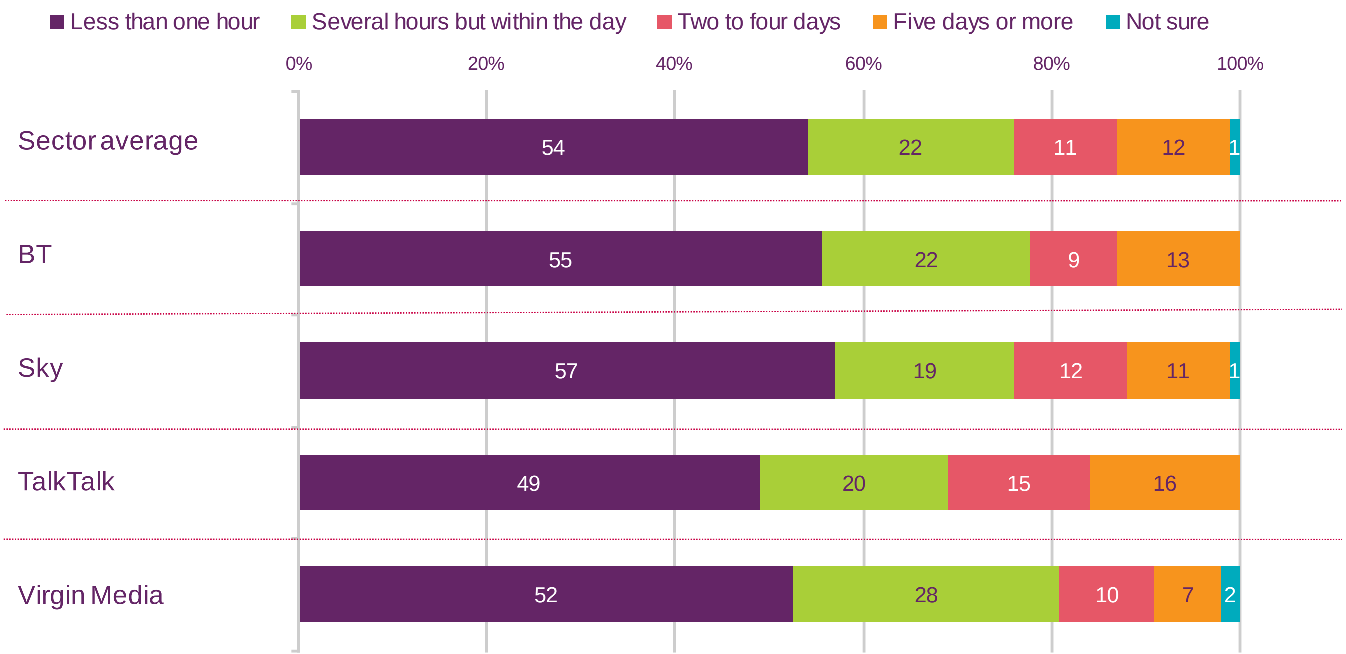
Over half of landline customers completely resolved their issue in less than one hour

Customers who considered their issue to be completely resolved were asked how long it had taken to resolve the issue with their provider. Figure 19 shows the percentage of customers who said that issue resolution had taken less than one hour, several hours but within one day, from two to four days, or five days or more.

More than half of landline customers said the time taken was less than one hour (54%), with around three in four (76%) saying the issue was completely resolved within the day. Resolution within the hour or within the day did not vary for any of the providers included in this report compared to the sector average.

Around one in ten (12%) said the issue took five days or more to resolve, and this incidence also did not vary by provider.

Figure 19: Time taken to resolve the issue – landline: 2015



Q10. How long did it take to resolve the issue with [PROVIDER]? (prompted responses, single coded)
Base: All UK households who contacted their landline provider whose issue was completely resolved (In 2015 – 818 Total, 201 BT, 227 Sky, 175 TalkTalk, 215 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015
↑↓ Indicates significantly higher/ lower than the sector average at the 99% confidence level.

Overall satisfaction with provider and with customer service received

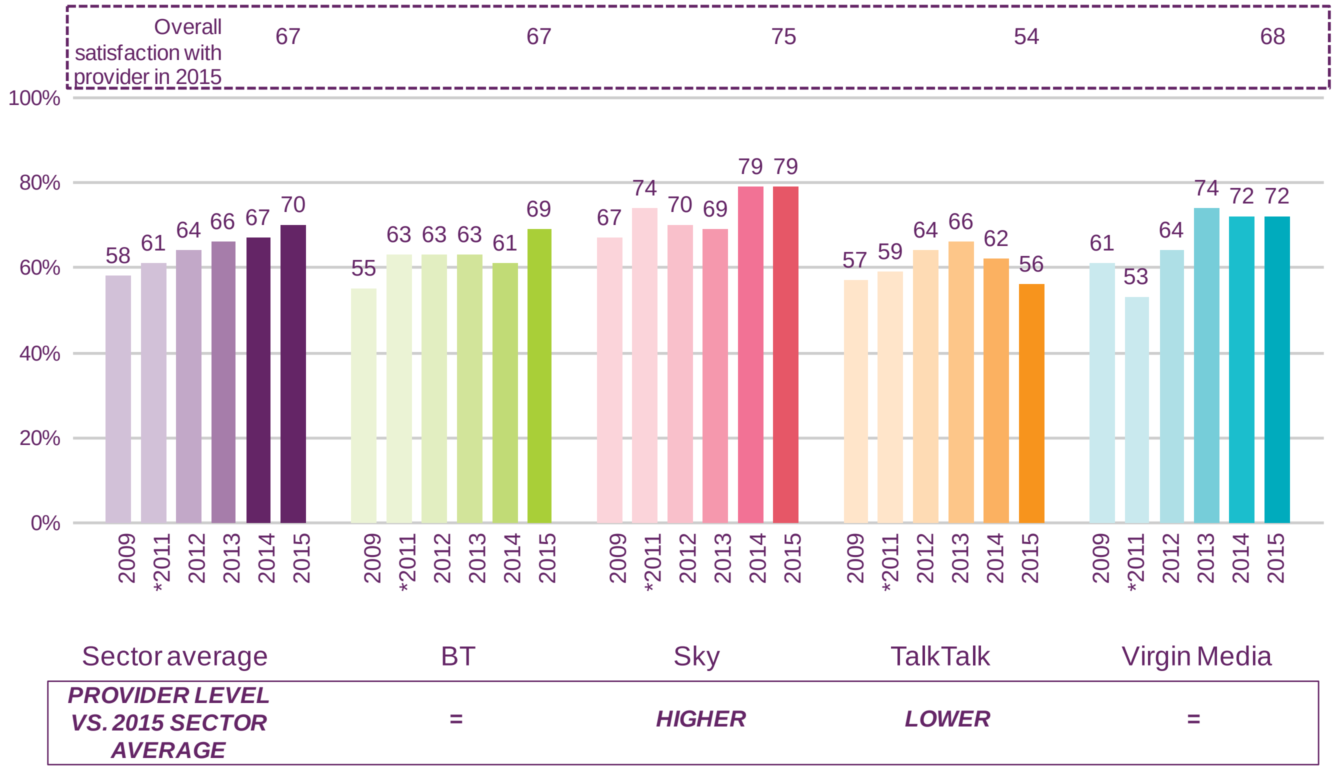
Sky landline customers were more likely to be satisfied with the customer service received compared to the average for this sector, TalkTalk landline customers were less likely

Satisfaction with the customer service provided by the landline provider when the customer was recently in contact, as shown in Figure 20, was at a comparable level to overall satisfaction (as shown at the top of Figure 20) for both the sector overall and for each provider. In 2015 overall satisfaction with the provider was unchanged since 2014 for the sector overall and for three of the four providers. The exception was that overall satisfaction with TalkTalk was lower in 2015 compared to 2014 (54% vs. 67%). In 2015, overall satisfaction varied by provider; with higher satisfaction among Sky customers compared to the sector average (75% vs. 67%) and lower satisfaction among TalkTalk customers (54% vs. 67%). This variation by provider in overall satisfaction was not evident in 2014.

In 2015, seven in ten customers (70%) who contacted their landline provider were satisfied with the customer service received, unchanged from 2014. As in 2014, Sky customers were more likely than the sector overall to say they were satisfied with the customer service received (79% for Sky vs. 70% for the sector overall). TalkTalk customers were less likely than the sector overall to say they were satisfied with the customer service received (56% for TalkTalk vs. 70% for the sector overall).

There were no other differences in satisfaction with customer service received for any other provider compared to the sector overall. Compared to 2014, satisfaction with the customer service received was unchanged for the sector overall and for each of the providers.

Figure 20: Satisfaction with customer service from provider – landline: 2009, 2011, 2012, 2013, 2014 and 2015

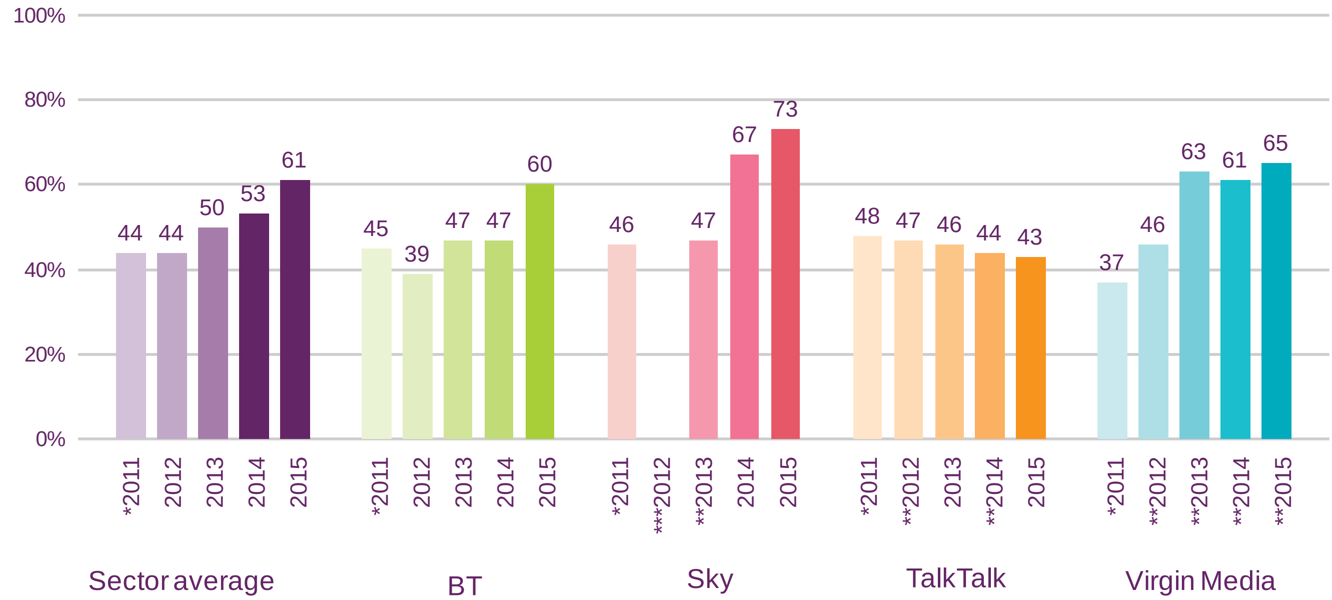


Q3. Overall how satisfied are you with the service you received from [PROVIDER] customer services on this occasion? (prompted responses, single coded) *In 2011, two waves of research were conducted and the data shown relates to Q3
Base: All UK households who contacted their landline provider (In 2015 – 1200 Total, 300 BT, 300 Sky, 300 TalkTalk, 300 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015.
↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level

Figure 21 shows overall satisfaction with customer service among those customers who contacted their landline provider with a complaint. As in previous years, satisfaction among those with a complaint remained lower than the average of 70% for all contacts. Six in ten of those (61%) who contacted their landline provider with a complaint were satisfied with the customer service received. Unlike in 2014, this average for the sector shows some variation by provider: TalkTalk customers making contact with a complaint were less likely to say they were satisfied compared to the sector average (43% for TalkTalk vs. 61% for the sector overall).

Compared to 2014, overall satisfaction with customer service among customers with a complaint was unchanged for the sector overall and for each of the providers.

Figure 21: Satisfaction with customer service from provider – landline complaints: 2011-2015



PROVIDER LEVEL VS. 2015 SECTOR AVERAGE	=	=	***LOWER***	=

Q3. Overall how satisfied are you with the service you received from [PROVIDER] customer services on this occasion? (prompted responses, single coded) *In 2011, two waves of research were conducted and the data shown relates to Q3. Not asked in 2009.
**Caution: Base below 100 ***Base below 50, not reported for Sky in 2012
Base: All UK households who contacted their landline provider with a complaint (In 2015 – 445 Total, 118 BT, 106 Sky, 124 TalkTalk, 97 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015

↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level

Satisfaction with contacting customer service

Sky customers reported higher than average satisfaction with contacting customer service, with lower than average satisfaction among TalkTalk customers for some measures

Customers who had contacted their landline provider (either by phone, email, webchat or letter) were asked to rate their satisfaction with various aspects of their provider's customer services on a 10 point scale; where 10 is extremely satisfied and 1 is extremely dissatisfied.

Figure 22 shows the percentage of customers stating that they were satisfied (giving a rating of 7-10) for three measures relating to contacting customer services[26].

[26] The measure 'Ease of getting through to the right person' was asked of those who contacted customer services by phone.

As in 2014, among those who contacted their landline provider, satisfaction was highest for ease of finding provider contact details (69%) and lowest for calling back when they said they would (47%).

Around two-thirds (64%) of those who contacted their landline provider by phone were satisfied with the ease of getting through to the right person.

In 2015, compared to the sector overall, Sky customers were more likely to be satisfied with the ease of finding provider contact details (78% vs. 69%), with them calling back when they said they would (56% vs. 47%) and with the ease of getting through to the right person (75% vs. 64%). This higher satisfaction among Sky customers was also the case for these three measures in 2014.

In 2015, compared to the sector overall, TalkTalk customers were less likely to be satisfied with the ease of finding provider contact details (58% vs. 69%) and with the ease of getting through to the right person (53% vs. 64%). This variation among TalkTalk customers was not evident in 2014.

Results did not vary compared to the sector average for any other landline providers.

There was no change in the sector average scores or the scores for individual providers from 2014 for any of the three measures shown in Figure 22.

Figure 22: Satisfaction with contacting customer service: 2013-2015

% satisfied (giving a rating of 7-10)	Sector average			BT			Sky			TalkTalk			Virgin Media		
	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015
Ease of finding provider contact details	65	66	69	61	58	66 =	68	75	78 *H*	67	66	58 *L*	73	72	71 =
Calling you back when they said they would	44	43	47	44	41	46 =	48	59	56 *H*	42	35	40 =	41	39	44 =
Ease of getting through to the right person (phone only)	58	60	64	51	53	60 =	69	74	75 *H*	60	56	53 *L*	67	63	65 =

Q4. How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied (prompted responses, single coded)
Base: All UK households who contacted their landline provider/ who contacted by phone (In 2015 – 1200/ 1094 Total, 300/ 270 BT, 300/ 276 Sky, 300/ 271 TalkTalk, 300/ 277 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015

↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level

=/ *H*/ *L* Indicates that the provider's measure did not differ/ was higher/ was lower compared to the sector average in 2015

Satisfaction with speed of customer service

Increase in satisfaction since 2014 among landline customers with the time taken to handle the issue

Figure 23 shows the percentage of customers stating that they were satisfied (giving a rating of 7-10) with two specific measures relating to the speed of customer service[27].

Around three in five customers who contacted their landline provider were satisfied with both the speed of answering the phone (63%) and the time taken to handle the issue (66%). As for the earlier measures shown in Figure 22, compared to the landline sector average, Sky customers were more likely to be satisfied with the time taken to handle the issue (74% vs. 66%) and TalkTalk customers were less likely to be satisfied with this measure (52% vs. 66%).

Since 2014, landline customers as a whole were more likely to say they were satisfied with the time taken to handle the issue (66% vs. 60%). While there were no changes since 2014 at a sector average level for the speed of answering phones, BT customers were more likely since 2014 to say they were satisfied this (63% vs. 50% in 2014).

Figure 23: Satisfaction with the speed of customer service: 2013-2015

% satisfied (giving a rating of 7-10)	Sector average			BT			Sky			TalkTalk			Virgin Media		
	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015
Speed of answering phones (phone only)	58	59	63	51	50	63↑ =	65	70	69 =	60	58	54 =	66	63	64 =
The time taken to handle issue	61	60	66↑	56	56	65 =	64	72	74 *H*	62	53	52 *L*	68	66	66 =

Q4. How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied (prompted responses, single coded)
Base: All UK households who contacted their landline provider/ who contacted by phone (In 2015 – 1200/ 1094 Total, 300/ 270 BT, 300/ 276 Sky, 300/ 271 TalkTalk, 300/ 277 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015
↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level
=/ H/ L Indicates that the provider's measure did not differ/ was higher/ was lower compared to the sector average in 2015

27 The measure 'Speed of answering the phone' was asked of those who contacted customer services by phone

Satisfaction with advice from customer service

At least three in five who contacted their landline provider felt the information received was useful and easy to understand, with some variation by providers

Customers who contacted their landline provider in the three months prior to the interview were asked to rate their satisfaction with three aspects relating to the standard of advice from their landline provider (Figure 24).

Satisfaction with the standard of advice from the landline provider's customer service was consistent across each of its three constituent elements. Around two in three customers were satisfied that the advice/ information was easy to understand (68%), useful (66%), and with getting the issue resolved to their satisfaction (67%). As in 2014, there was some variation in these sector averages by provider. Sky landline customers were more likely to say they were satisfied that the advice/ information was easy to understand (78% vs. 68%) and useful (74% vs. 66%). In 2015, TalkTalk landline customers were less likely to say they were satisfied that the advice/ information was easy to understand (57% vs. 68%), useful (52% vs. 66%), and with getting the issue resolved to their satisfaction (55% vs. 67%)

There was no change for any of these three measures since 2014 for the landline sector overall or for any individual provider.

Figure 24: Satisfaction with the standard of advice from customer service: 2013-2015

% satisfied (giving a rating of 7-10)	Sector average			BT			Sky			TalkTalk			Virgin Media		
	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015
Advice/ information was easy to understand	64	64	68	60	60	68 =	72	74	78 *H*	62	58	57 *L*	71	68	66 =
Advice/ information was useful	60	61	66	56	57	66 =	67	74	74 *H*	60	54	52 *L*	68	66	65 =
Getting the issue resolved to your satisfaction	63	63	67	59	56	65 =	69	72	77 =	65	61	55 *L*	69	69	69 =

Q4. How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied (prompted responses, single coded)
Base: All UK households contacting landline provider (In 2015 – 1200 Total, 300 BT, 300 Sky, 300 TalkTalk, 300 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015

↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level

=/ H/ L Indicates that the provider's measure did not differ/ was higher/ was lower compared to the sector average in 2015

Satisfaction with customer service advisor

Sky was rated above average and TalkTalk was rated below average for all six measures relating to satisfaction with the customer service advisor

Customers who contacted their landline provider in the three months prior to the interview were asked to rate their satisfaction with the customer service advisor for six individual measures. These measures are shown in Figure 25.

As in 2014, for the landline sector overall, satisfaction was highest for courtesy and politeness of advisors (75%) and lowest for the advisor logging query details to avoid having to repeat yourself (61%).

Also as in 2014, there were some variations by provider. Sky was again rated above the sector average for all six measures: courtesy and politeness of advisors (84% vs. 75%), advisor ability to understand the issue and identify the problem (76% vs. 68%), advisor took my questions/ issue seriously (81% vs. 72%), keeping you informed throughout the process (79% vs. 70%), advisor doing what they said they would do (80% vs. 69%) and logging of query details to avoid having to repeat yourself (71% vs. 61%).

In 2014, TalkTalk was rated below the sector average for two measures. In 2015, TalkTalk customers were less likely to say they were satisfied for all six measures: courtesy and politeness of advisors (62% vs. 75%), advisor ability to understand the issue and identify the problem (55% vs. 68%), advisor took my questions/ issue seriously (59% vs. 72%), keeping you informed throughout the process (58% vs. 70%), advisor doing what they said they would do (60% vs. 69%) and logging of query details to avoid having to repeat yourself (48% vs. 61%).

Results did not vary compared to the sector average for any other landline providers.

Since 2014, two measures have increased levels of satisfaction at an overall level: keeping you informed throughout the process (70% vs. 63% in 2014) and logging of query details to avoid having to repeat yourself (61% vs. 55% in 2014). BT customers were more likely since 2014 to say they were satisfied with their provider keeping you informed throughout the process (69% vs. 58% in 2014)

Figure 25: Satisfaction with the customer service advisor: 2013-2015

% satisfied (giving a rating of 7-10)	Sector average			BT			Sky			TalkTalk			Virgin Media		
	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015
Courtesy and politeness of advisors	77	72	75	76	68	73 =	80	81	84 *H*	73	68	62 *L*	79	78	76 =
Advisor ability to understand the issue and identify the problem	66	64	68	63	59	67 =	72	75	76 *H*	62	52	55 *L*	71	73	71 =
Advisor took my questions/ issue seriously	70	68	72	67	65	72 =	76	76	81 *H*	70	60	59 *L*	74	75	70 =
Keeping you informed throughout the process	63	63	70↑	60	58	69↑ =	68	75	79 *H*	62	55	58 *L*	67	68	68 =
Advisor doing what they said they would do	66	64	69	64	59	66 =	72	76	80 *H*	65	57	60 *L*	70	72	69 =
Logging of query details to avoid having to repeat yourself	58	55	61↑	56	52	60 =	64	67	71 *H*	54	46	48 *L*	65	60	60 =

Q4. How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied (prompted responses, single coded)
Base: All UK households who contacted their landline provider (In 2015 – 1200 Total, 300 BT, 300 Sky, 300 TalkTalk, 300 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015

↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level

=/ *H*/ *L* Indicates that the provider's measure did not differ/ was higher/ was lower compared to the sector average in 2015

Satisfaction with other aspects of customer service

Sky rated above average and TalkTalk below average for satisfaction in relation to offering compensation payments and for willingness to help resolve issues

Figure 26 shows the percentage of satisfied customers for more general customer service attributes. While two-thirds of customers who contacted their landline provider were satisfied with the willingness to help resolve the issue (68%), around half as many were satisfied with the provider offering compensation or a goodwill payment (39%). In 2015, as in 2014, compared to the sector overall and in keeping with the other satisfaction measures shown, Sky customers were more likely to say they were satisfied with their provider in relation to offering compensation/ goodwill payments (51% vs. 39%) and in their willingness to help resolve the issue (77% vs. 68%).

Also in keeping with the other 2015 satisfaction measures shown, TalkTalk customers were less likely to say they were satisfied with their provider in relation to offering compensation/ goodwill payments (28% vs. 39%) and in their willingness to help resolve the issue (53% vs. 68%).

Compared to 2014, there were no changes in satisfaction for either measure among the four individual providers shown or for the sector overall.

Figure 26: Satisfaction with other aspects of customer service: 2013-2015

% satisfied (giving a rating of 7-10)	Sector average			BT			Sky			TalkTalk			Virgin Media		
	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015
Offering compensation or a goodwill payment	33	35	39	32	34	39 =	38	45	51 H	30	31	28 *L*	36	34	35 =
Willingness to help resolve your issue	66	65	68	64	61	67 =	69	74	77 *H*	65	57	53 *L*	73	70	70 =

Q4. How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied (prompted responses, single coded)
Base: All UK households who contacted their landline provider (In 2015 – 1200 Total, 300 BT, 300 Sky, 300 TalkTalk, 300 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015

↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level

=/ H/ L Indicates that the provider's measure did not differ/ was higher/ was lower compared to the sector average in 2015

Future use of provider based on experience

As in 2014, one in four customers who had made contact with their provider said they were a lot more likely to use their landline provider as a result of their recent customer service experience

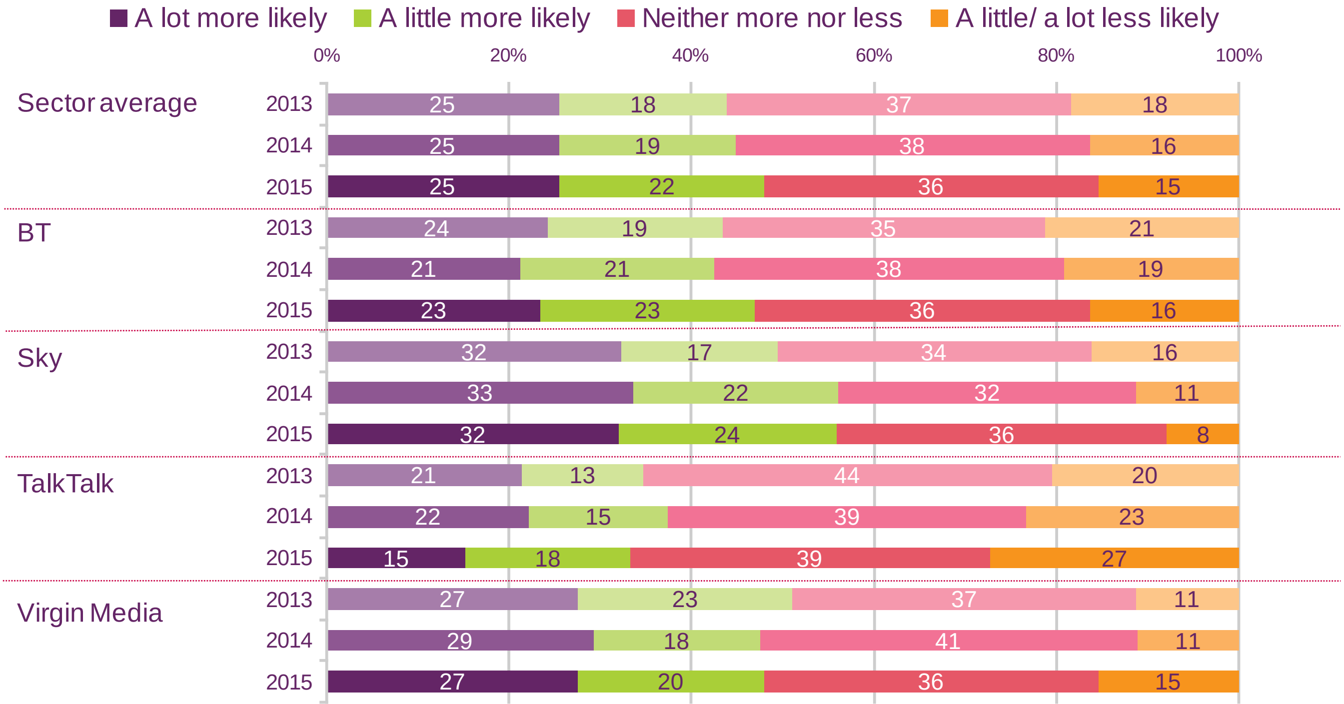
Customers who had contacted their landline provider were asked whether their most recent customer service experience has made them more or less likely to use their landline provider in the future. Results are shown at an overall level and by provider for each of 2013, 2014 and 2015 in Figure 27.

One in four customers who contacted their landline provider said they were 'a lot more likely' to use their provider in the future (25%), as in 2014 and in 2013. There were no differences between 2014 and 2015 in likelihood of future use for any individual provider.

In 2015, around one in seven customers who contacted their landline provider said they were now 'a little or a lot less likely' (15%), and this is also unchanged from 2014 (16%).

In 2015, while one in three Sky customers said they were 'a lot more likely' to use their provider in the future (32%), this did not differ from the sector overall (25%). However, more than half of Sky customers said they were either 'a lot' or 'a little more likely' to use their provider in the future (56%), which was higher than the corresponding measure for the sector overall (47%). Similarly, one in three TalkTalk customers said they were either 'a lot' or 'a little more likely' to use their provider in the future (33%) which was lower than the corresponding measure for the sector overall (47%). Around one quarter of TalkTalk customers said they were now 'a little or a lot less likely' (27%), and this is higher than the corresponding measure for the sector overall (15%).

Figure 27: Future use of provider given customer service experience - landline: 2013-2015



Q7. Has your experience of [PROVIDER]'s customer service for this issue made you more or less likely to use [PROVIDER] in the future? (prompted responses, single coded)
Base: All UK households contacting landline provider (In 2015 – 1200 Total, 300 BT, 300 Sky, 300 TalkTalk, 300 Virgin Media) Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015.

↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level

Saville Rossiter-Base

Section 5

Broadband sector

This section looks in detail at the broadband sector. It shows, where possible, how each provider included (BT, Sky, TalkTalk and Virgin Media) performed against key measures such as:

- incidence of contact about broadband
- incidence of complaints
- issue type
- whether the issue was completely resolved
- time taken to resolve the issue
- satisfaction with customer service
- future use based on customer service experience

For each measure this section shows how the provider performed in 2015 against the overall broadband sector average. This section also shows, where possible, how the sector average and the provider-specific measures in 2015 compared to those in 2014. The longer term trend is also reported, where appropriate. Inclusion in this research did not necessarily mean a high level of complaints.

Where we report a provider's position as in line with the sector average, we mean there is no statistically significant difference between that average and that provider. There may, nonetheless, be statistically significant differences between providers whose positions are reported as each in line with the sector average.

Orange/ EE broadband was not included in 2014 or in 2015 due to not meeting the threshold for inclusion of 4% market share. It is worth noting that the average sector score for 2009, 2011, 2012 and 2013 included Orange/EE, whereas this provider was not included in this average score in 2014 or 2015.

References in this section of the report relating to all broadband providers collectively relate to those broadband providers included in this 2015 study (i.e. BT, Sky, TalkTalk and Virgin Media). These same providers were included in the 2014 study.

Recent contact with provider

One in five broadband customers had contacted their provider about the service in the three months prior to the interview, as in 2014

Figure 28 shows the proportion of customers that had made contact (by telephone, email, webchat or letter)[28], in the three months prior to the interview[29], with any of the four broadband providers. This

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[28] Prior to 2014 respondents were only asked about contact by telephone or email, with contact by webchat or letter added in 2014. Data from previous years is therefore not directly comparable

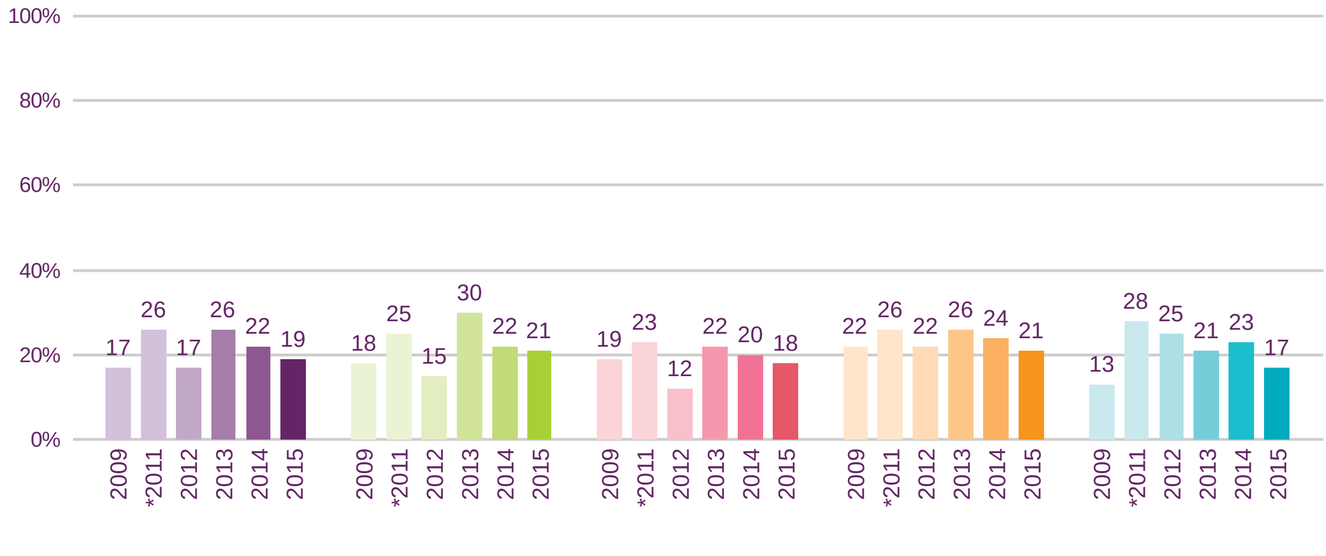
[29] With the data for this measure coming from the omnibus study this meant that the contact was between May and October 2015

contact was either regarding a specific issue relating to their broadband service or a more general issue that applies to all the services they may take with that provider[30].

In 2015, one in five (19%) of all respondents who used one of the four eligible broadband providers detailed in this report had contacted their provider in the three months prior to the interview. This incidence of contact did not differ by provider compared to the sector average[31].

There was no change in the overall incidence of contact to any broadband provider since 2014 (19% in 2015 vs. 22% in 2014) and no change for any of the four individual providers.

Figure 28: Proportion of customers who contacted their broadband provider in the three months prior to the interview: 2009, 2011, 2012, 2013, 2014 and 2015



PROVIDER LEVEL VS. 2015 SECTOR AVERAGE	BT	Sky	TalkTalk	Virgin Media
	=	=	=	=

Q6. Thinking of [PROVIDER] and the services you buy from them, have you contacted them in the last 3 months by telephone, email, webchat or letter? (spontaneous responses, single coded) NB – Prior to 2014 respondents were only asked about contact by telephone or email, with contact by webchat or letter added in 2014 so data is not directly comparable *In 2011, two waves of research were conducted and the data shown relates to Q3
Base: All UK households who used broadband providers (In 2015 – 2669 Total, 730 BT, 747 Sky, 469 TalkTalk, 723 Virgin Media)
Source: Ofcom research, omnibus survey, fieldwork carried out by Saville Rossiter-Base in August, September and November 2015.
↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level

[30] So for example, if a customer has their broadband and landline service provided by BT and they did not say their most recent contact was regarding the broadband specifically, then they were asked whether it was a general issue that applied to both their broadband and landline service
[31] This is indicated by the '=' symbols appearing for each provider in the box below the chart within Figure 28. This convention is included across several of the Figures in this and subsequent sections. If in 2015, for a given measure a provider performed better than the sector average the box below the chart will show *'HIGHER'* for that particular provider and if a provider performed worse then it will show *'LOWER'*

Proportion of complaints

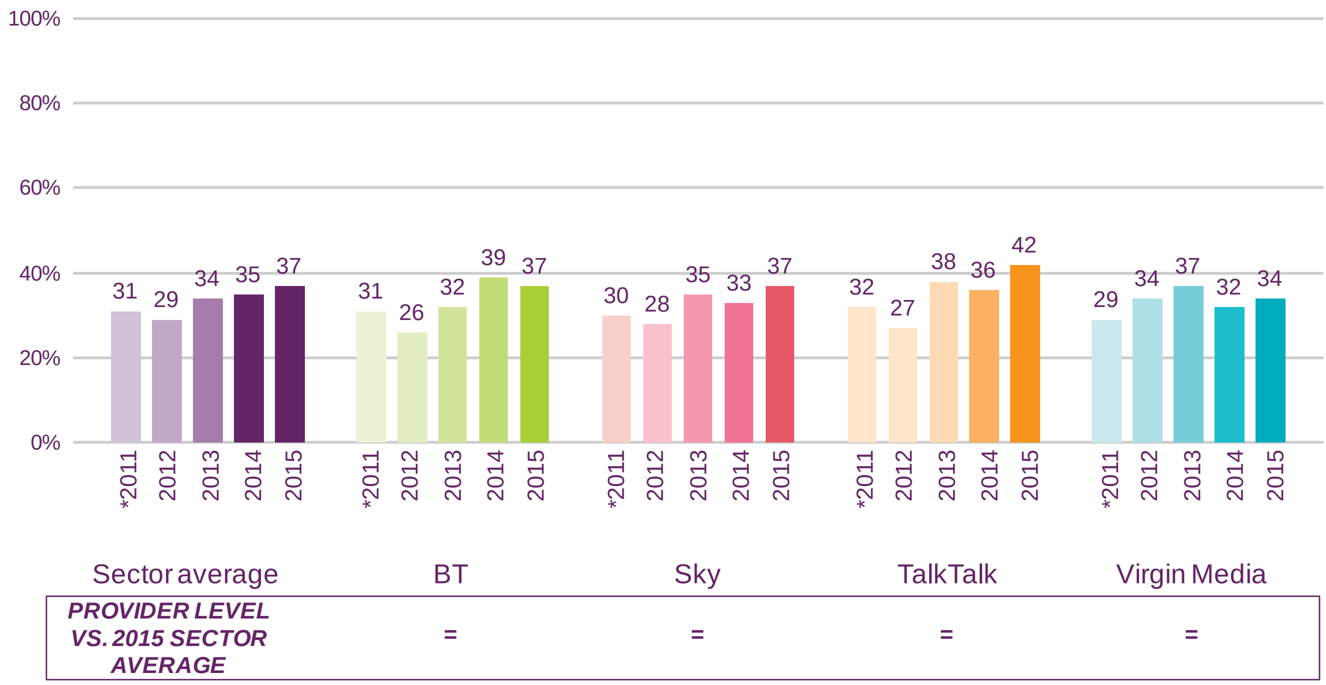
Around two in five contacts with broadband providers were considered complaints - unchanged since 2014

Since the 2011 survey[32], those customers that had contacted their broadband provider (in the three months prior to the interview[33]) were asked whether they considered the reason for this contact to be a complaint[34]. Figure 29 shows that just under two in five contacts (37%) were considered to be complaints. As with overall contact (shown in Figure 28), this incidence did not vary in 2015 for any of the four providers compared to the broadband sector average.

There was no change since 2014 in the proportion of contacts considered to be complaints for the broadband sector overall (37% in 2015 vs. 35% in 2014) or for any of the four providers.

Any change in the levels of satisfaction since 2014 among broadband customers at an overall level or among customers of any particular provider cannot be said to be due to an increase or decrease in the incidence of complaints.

Figure 29: Proportion of recent contacts with broadband providers considered by the customer to be a complaint: 2011-2015



Q5a. And in your opinion, was the reason for this contact with [PROVIDER] a complaint, or something else? (prompted responses, single coded) *In 2011, two waves of research were conducted and the data shown relates to Q3. Not asked in 2009.
Base: All UK households who contacted their broadband provider (In 2015 – 1600 Total, 400 BT, 400 Sky, 400 TalkTalk, 400 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015.
↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level.

[32] The question to establish whether the reason for contact was considered to be a complaint was only included in the study since 2011, hence no data being shown for 2009
[33] With the data for this measure coming from the online study this meant that the contact was between July and September 2015
[34] Respondents were not prompted with a definition of a complaint, this was therefore self-defined by the respondent

Most recent contact by issue type

There was no change from 2014 in the type of issue that customers were contacting their broadband provider about

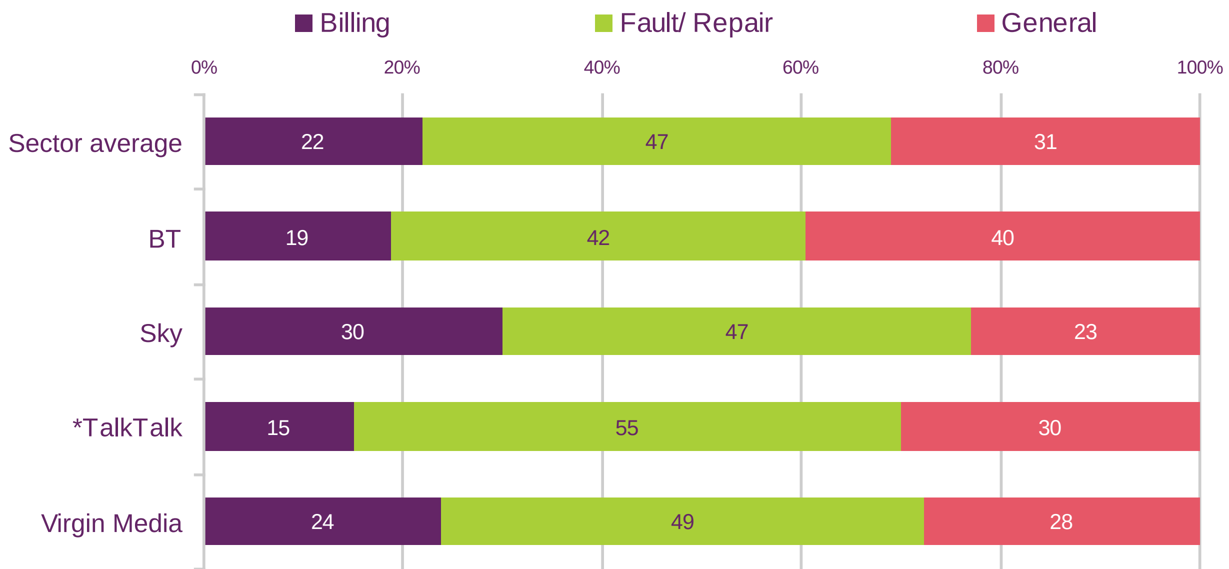
Customers were prompted with a list of seven possible reasons for contacting their broadband provider and asked to say which one applied to their most recent contact. These seven possible responses were then grouped into three distinct categories: a billing issue, a fault or repair issue or a general enquiry issue.

Figure 30 shows the incidence of the three types of issue in 2015. Within the broadband sector overall the most common reason for recent contact was a fault or repair and the least common reason is a billing issue. Across all broadband providers included in this study around half of contacts (47%) related to a fault or repair, three in ten contacts (31%) related to a general enquiry and one in five (22%) related to a billing issue.

In 2015, the profile of the types of issues for recent contact did not differ for BT, Sky, TalkTalk or Virgin Media customers compared to the overall sector average[35].

There was no change from 2014 in the type of issue that broadband providers were contacted about.

Figure 30: Type of issue for most recent contact with broadband provider: 2015



Q8. Thinking of the most recent issue you had to contact [PROVIDER] about, which one of the following categories did the issue fall into? Was it to do with..... ? (prompted responses, single coded) *Caution: Base below 100
Base: All UK households who contacted their broadband provider (In 2015 – 488 Total, 130 BT, 140 Sky, 87 TalkTalk, 131 Virgin Media)
Source: Ofcom research, omnibus survey, fieldwork carried out by Saville Rossiter-Base in August, September and November 2015.
↑↓ Indicates significantly higher/ lower than sector average at the 99% confidence level.

[35] The number of interviews conducted on the omnibus study among TalkTalk broadband customers was between 50 and 100 interviews and should therefore be treated as indicative only

Key issues by contact type

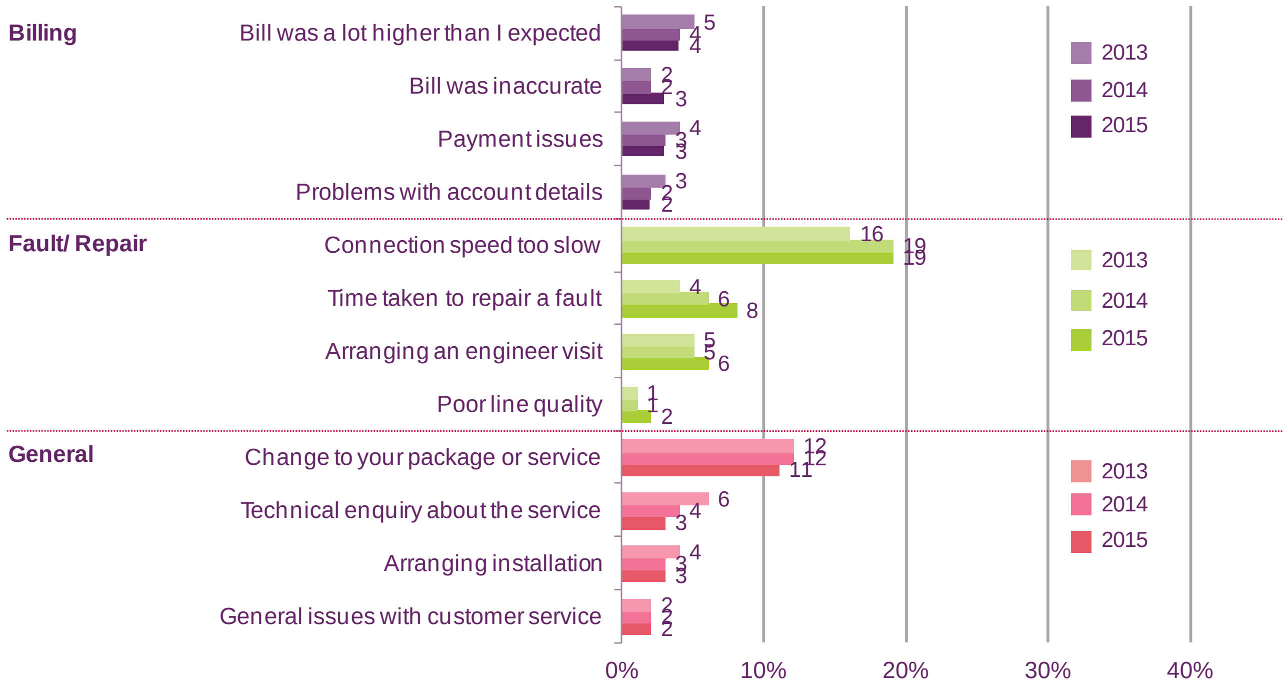
The most common reason for contacting the broadband provider, was a slow broadband connection speed

Figure 31 shows the top four reasons for recent contact with service providers for each type of issue[36]. No single reason accounted for the majority of contacts from broadband customers to their provider in 2015, as was also the case in 2014 and 2013.

The most commonly mentioned reason for contacting their provider was that the connection speed was too slow (19%), followed by making a change to their package or service (11%) in terms of upgrading or downgrading it. These were also the top two reasons for contact in both 2014 and in 2013.

There was no change in the incidence of any reasons for contact compared with 2014.

Figure 31: Broadband – Top 4 issues per contact type: 2013-2015



S7a-c. And more specifically, which of the following best describes what the issue with [PROVIDER] was concerning? (prompted responses, single coded)
Base: All UK households who contacted their broadband provider (In 2013 – 1803 Total, In 2014 – 1600 Total, In 2015 – 1600 Total)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015.
↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level.

[36] Respondents were shown a different list of reasons to choose from dependent on whether they said their most recent contact was regarding a billing, fault and repair or general issue. To enable a comparison the data in Figure 31 was expressed as a proportion of all those that had contacted their broadband provider in the 3 months prior to the interview (July to September 2015)

Number of contacts

Half of customers who contacted their broadband provider required more than one contact

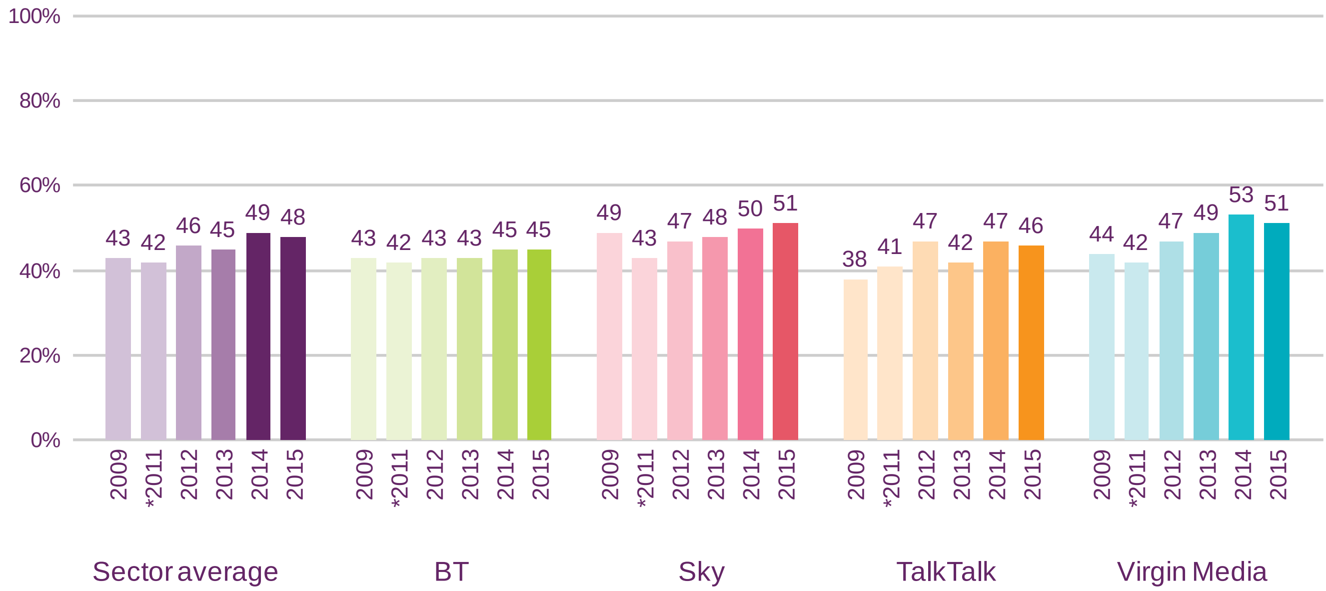
Customers were asked how many times they had been in contact, so far, with their broadband provider about their most recent issue. Figure 32 shows the proportion that had only been in contact once with their broadband provider, at an overall sector level and by provider (between 2009 and 2015).

Half of customers who contacted any broadband provider only made contact on one occasion (48%), and the incidence did not vary in 2015 for any of the four providers compared to this sector average.

From 2014, there was no change in the proportion of customers who had only been in contact once with their broadband provider, either at an overall sector level (49% in 2014) or by provider.

In 2015, those customers who did not feel their issue was a complaint were more likely to have contacted their broadband provider only once compared to those making contact with a complaint (58% vs. 33% for those with a complaint).

Figure 32: Proportion in contact one time with the provider – broadband: 2009, 2011, 2012, 2013, 2014 and 2015



	BT	Sky	TalkTalk	Virgin Media
PROVIDER LEVEL VS. 2015 SECTOR AVERAGE	=	=	=	=

Q6. How many times have you been in contact with [PROVIDER] in relation to this particular issue so far? (prompted responses, single coded) *In 2011, two waves of research were conducted and the data shown relates to Q3
Base: All UK households who contacted their broadband provider (In 2015 – 1600 Total, 400 BT, 400 Sky, 400 TalkTalk, 400 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015.

↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level.

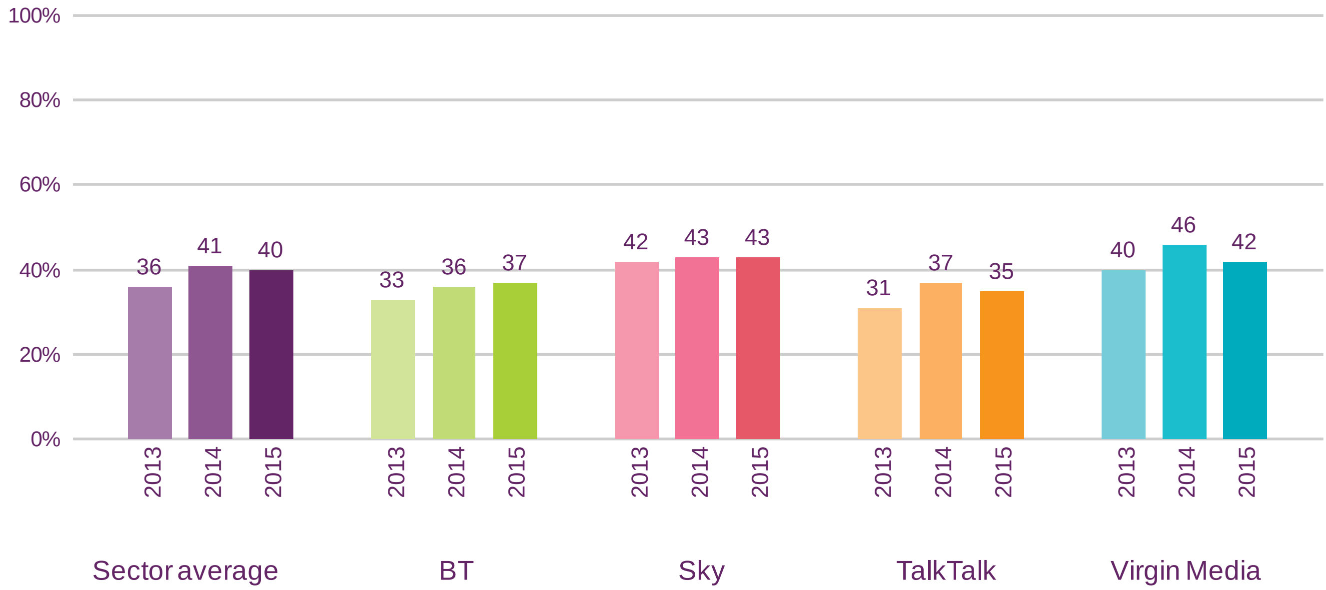
Issue resolution

Four in ten who contacted their broadband provider recently had their issue completely resolved in one contact, unchanged since 2014

Those that had contacted their broadband provider were asked the extent to which they felt the issue they had contacted their provider about had been resolved. Respondents were given the choice of whether the issue had been fully resolved, partially resolved or if it was still unresolved (as defined by the respondent). Figure 33 shows the proportions in 2013, 2014 and 2015 who considered their issue completely resolved[37] in one contact[38].

Four in ten customers who contacted their broadband provider in the three months prior to the interview in 2015 considered their issue completely resolved in the first contact (40%) and this incidence did not vary among the four providers shown. The proportion of broadband customers who felt their issue had been completely resolved in one contact was unchanged from 2014 (41% in 2014) and there was also no change for 2014 for any of the broadband providers.

Figure 33: Proportion whose issue was completely resolved in one contact – broadband: 2013-2015



PROVIDER LEVEL VS. 2015 SECTOR AVERAGE	BT	Sky	TalkTalk	Virgin Media
	=	=	=	=

Q6. How many times have you been in contact with [PROVIDER] in relation to this particular issue so far? (prompted responses, single coded) *In 2011, two waves of research were conducted and the data shown relates to Q3
Base: All UK households who contacted their broadband provider (In 2015 – 1600 Total, 400 BT, 400 Sky, 400 TalkTalk, 400 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015.

↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level.

[37] It was decided since 2013 to report on complete resolution as issues that were 'partly' resolved may go on to be completely resolved or may remain only partly resolved

[38] Since 2014 it was decided to report on those who had their issue resolved in one contact (as opposed to those who felt their issue was resolved across several contacts) as this would not be influenced by the date of their initial contact (which could have been anytime between July and September 2015)

Half of those making contact with a billing or general enquiry felt their issue was completely resolved in a single contact, unchanged since 2014

Figure 34 shows the proportion in 2014 and 2015 who contacted their broadband provider in the three months prior to the interview with a billing, fault/ repair, or a general enquiry issue and considered this issue completely resolved in one contact.

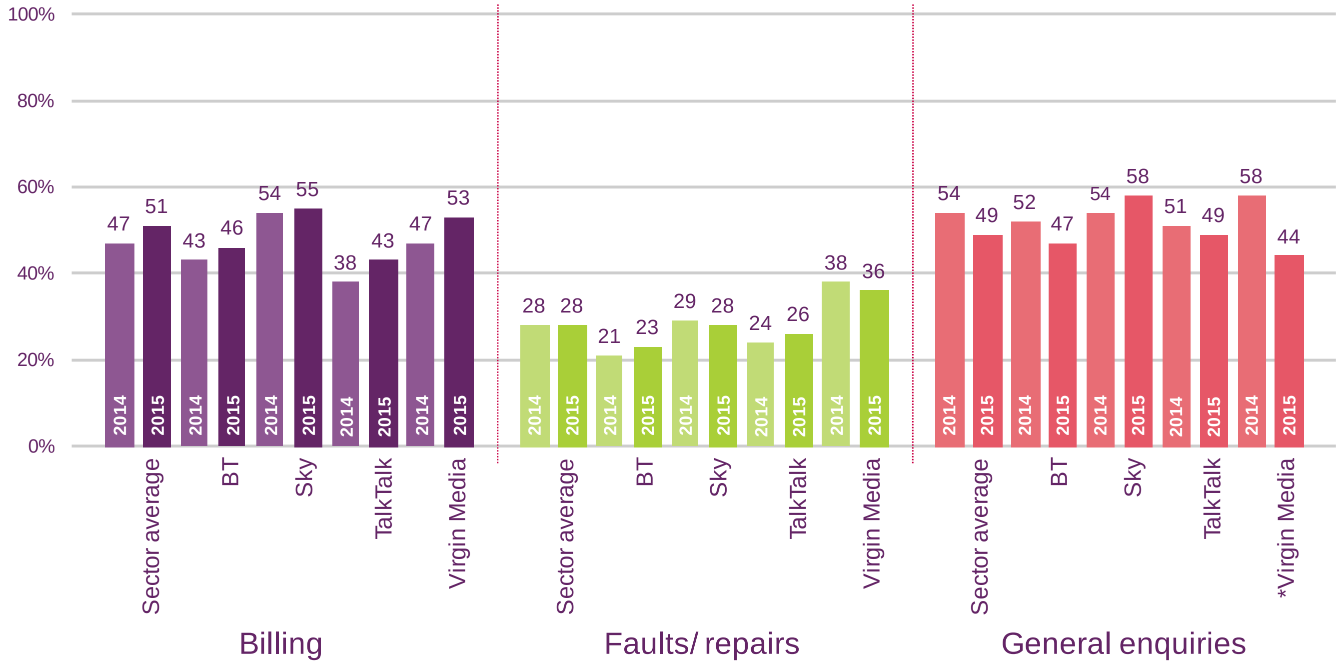
In 2014, around half of customers who contacted their broadband provider with either a billing enquiry (51%) or with a general enquiry (49%) felt their issue had been completely resolved in one contact. A minority of customers who contacted about a fault/ repair (28%) felt their issue had been completely resolved as a result of their first contact. As with the landline sector, faults/ repairs were the issue that were considered least likely to be completely resolved after one contact – as in 2014.

In 2015, as in 2014, no individual provider performed better or worse than the sector average for billing or general enquiry issues. Virgin Media broadband customers who contacted their provider about a fault/ repair were more likely to say they felt this issue had been completely resolved in one contact compared to the sector overall (36% vs. 28% overall). This had also been the case in 2014 for Virgin Media broadband customers with this type of issue (38% vs. 28% for the sector overall in 2014).

Compared to 2014, there was no change in the proportion of broadband customers who felt their issue had been completely resolved in one contact, for the sector overall and for the individual providers for each type of issue.

While not shown in Figure 34, those that contacted their broadband provider with a complaint were less likely to feel that their issue was completely resolved in one contact (25%) compared to those whose issue was not considered a complaint (48%).

Figure 34: Broadband - Whether the issue that the customer contacted their provider about was considered to be completely resolved in one contact, by provider: 2014 and 2015



Q5. In your opinion, was [PROVIDER] able to successfully resolve your issue [BILLING/ FAULT/ GENERAL ENQUIRY]? (spontaneous responses, single coded) *Caution: Base below 100
Base: All UK households who contacted their broadband provider about each type of issue (In 2015 – For billing 486 Total, 132 BT, 119 Sky, 132 TalkTalk, 103 Virgin Media, for faults/ repairs 706 Total, 152 BT, 167 Sky, 167 TalkTalk, 220 Virgin Media, for general enquiries 408 Total, 116 BT, 114 Sky, 101 TalkTalk, 77 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015.

Indicates significant increase/ decrease compared to 2014 at the 99% confidence level.

Time taken to resolve the issue

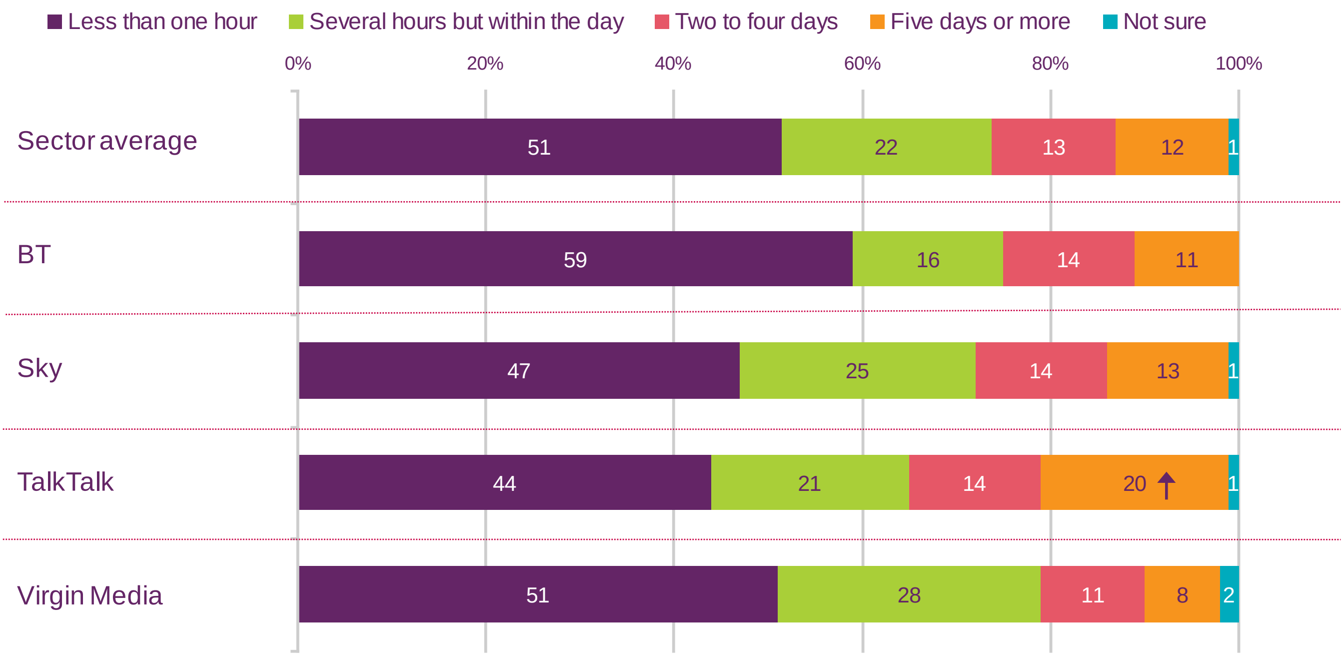
Half of broadband customers had their issue completely resolved within a day

Customers who considered their issue to be completely resolved were asked how long it had taken to resolve the issue with their provider. Figure 35 shows the percentage of customers saying that issue resolution had taken less than one hour, several hours but within one day, from two to four days, or five days or more.

Half of broadband customers said the time taken was less than one hour (51%) with three in four (74%[39]) saying the issue was completely resolved within the day. Resolution within the hour did not vary for any of the four providers shown compared to the sector average. TalkTalk broadband customers who considered their issue to be completely resolved were less likely to say this was within the day than the average for broadband customers (65% vs. 74%).

One in ten (12%) said the issue took five days or more to be completely resolved, and this incidence was higher among TalkTalk customers (20%).

Figure 35: Time taken to resolve the issue - broadband: 2015



Q10. How long did it take to resolve the issue with [PROVIDER]? (prompted responses, single coded)
Base: All UK households who contacted their broadband provider whose issue was completely resolved (In 2015 – 1035 Total, 244 BT, 295 Sky, 238 TalkTalk, 258 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015.
↑↓ Indicates significantly higher/ lower than the sector average at the 99% confidence level

[39] Totals may not equal the sum of the components due to rounding

Overall satisfaction with provider and with customer service received

Overall satisfaction and satisfaction with customer service in the broadband market was higher for Sky and lower for TalkTalk

Figure 36 shows levels of overall satisfaction with the broadband providers' customer service when the customer was recently in contact.

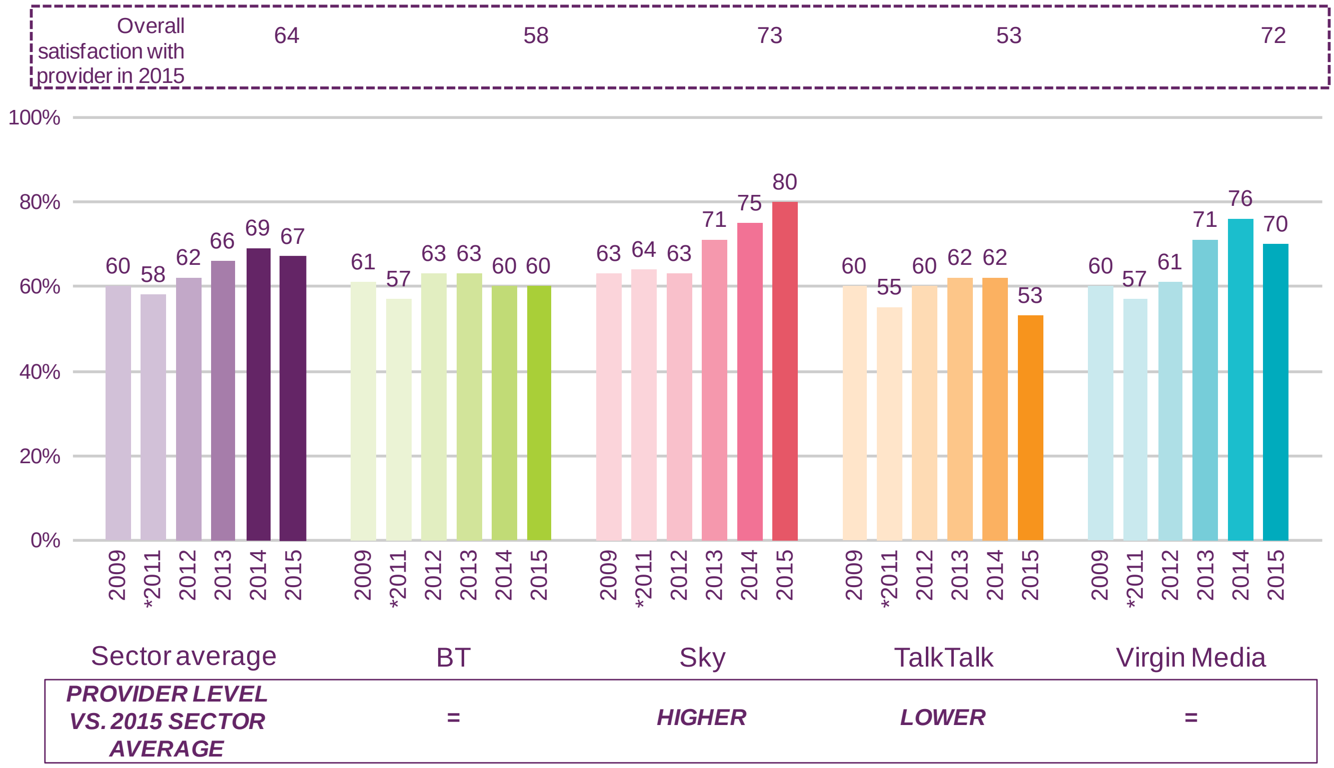
In 2015, around seven in ten customers (67%) who contacted their broadband provider were satisfied with the customer service received. Sky broadband customers who contacted their provider recently were more likely to say they were satisfied with the customer service received, compared to the sector overall (80% vs. 67%) while TalkTalk customers were less likely to say they were satisfied (53% vs. 67%). In 2014, higher and lower levels of satisfaction compared to the broadband sector overall were evident for Virgin Media and BT respectively. In 2015, these differences were not evident for these providers.

Compared to 2014, these satisfaction levels were unchanged for the four broadband providers and for the sector overall.

Figure 36 also shows (at the top of the Figure) overall satisfaction with the broadband provider among those recently in contact. In 2015, two in three customers (64%) were satisfied overall with their broadband provider. In line with the findings relating to satisfaction with the customer service received, Sky broadband customers were more likely to be satisfied compared to the sector overall (73% vs. 64%) and TalkTalk customers were less likely to be satisfied (53% vs. 64%). However, while Virgin Media and BT customers did not differ from the sector average in terms of satisfaction with the customer service received, they did differ in terms of overall satisfaction with the broadband provider. Virgin Media broadband customers were more likely to be satisfied compared to the sector overall (72% vs. 64%) and BT customers were less likely to be satisfied (58% vs. 64%).

Compared to 2014, broadband customers as a whole were less likely to say they were satisfied with their provider overall (64% vs. 68% in 2014), with this decrease evidence among TalkTalk broadband customers (53% vs. 64% in 2014).

Figure 36: Satisfaction with customer service from provider – broadband: 2009, 2011, 2012, 2013, 2014 and 2015



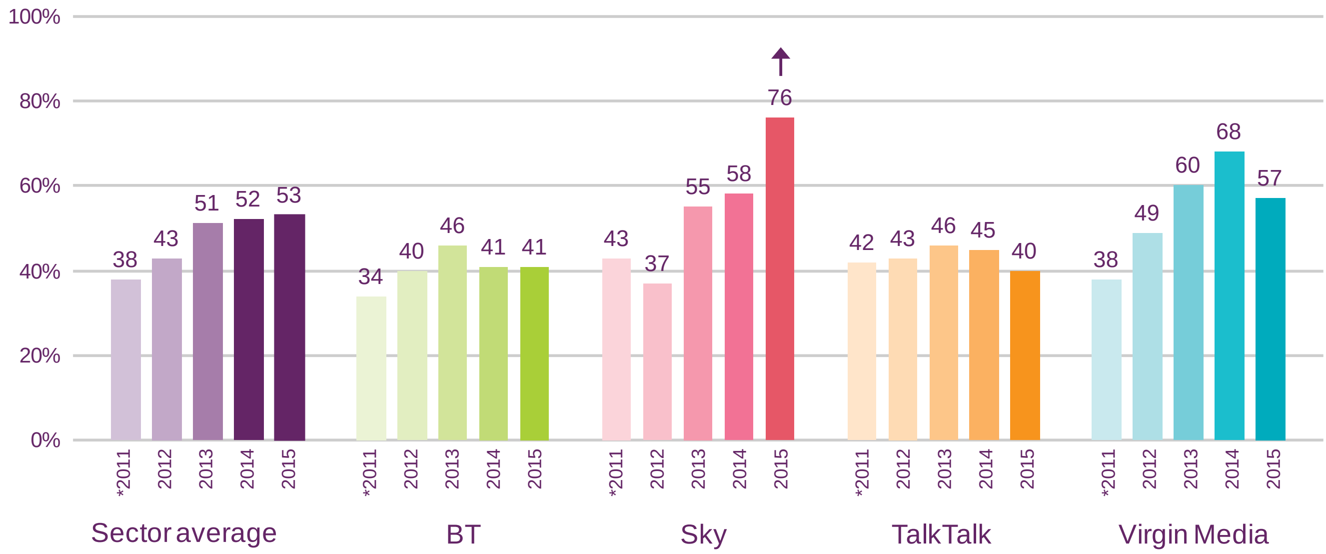
Q3. Overall how satisfied are you with the service you received from [PROVIDER] customer services on this occasion? (prompted responses, single coded) *In 2011, two waves of research were conducted and the data shown relates to Q3
Base: All UK households who contacted their broadband provider (In 2015 – 1600 Total, 400 BT, 400 Sky, 400 TalkTalk, 400 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015.

↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level.

Figure 37 shows overall satisfaction with customer service among those customers who contacted their broadband provider with a complaint, with half of these (53%) satisfied with the customer service received. In 2015, Sky customers with a complaint were more likely to say they were satisfied compared to the sector overall (76% vs. 53%) and TalkTalk customers were less likely (40% vs. 53%). Unlike satisfaction with the customer service received among all making contact, satisfaction among those making contact with a complaint was lower among BT customers compared to the sector overall (41% vs. 53%).

At an overall sector level, there was no change from 2014 in the levels of satisfaction with customer service among those who contacted their broadband provider with a complaint (53% vs. 52% in 2014). Sky customers making contact with a complaint were, however, more likely to be satisfied in 2015 compared to 2014 (76% vs. 58%).

Figure 37: Satisfaction with customer service from provider – broadband complaints: 2011-2015



PROVIDER LEVEL VS. 2015 SECTOR AVERAGE	LOWER	HIGHER	LOWER	=

Q3. Overall how satisfied are you with the service you received from [PROVIDER] customer services on this occasion? (prompted responses, single coded) *In 2011, two waves of research were conducted and the data shown relates to Q3
Base: All UK households who contacted their broadband provider with a complaint (In 2015 – 603 Total, 153 BT, 140 Sky, 161 TalkTalk, 149 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015.
Indicates significant increase/ decrease compared to 2014 at the 99% confidence level.

Satisfaction with contacting customer service

Sky broadband customers were more likely than average to be satisfied with contacting customer services

Customers who had contacted their broadband provider (either by phone, email, webchat or letter) were asked to rate their satisfaction with various aspects of their provider's customer services on a 10 point scale; where 10 is extremely satisfied and 1 is extremely dissatisfied.

Figure 38 shows the percentage of customers stating that they were satisfied (giving a rating of 7-10) for three measures relating to contacting customer services[40].

In 2015, as in 2014, among those who contacted their broadband provider, satisfaction was highest for ease of finding provider contact details (69%) and lowest for calling back when they said they would (44%). Each of these three measures shows some variation by provider compared to the sector average.

Sky customers (79%) and Virgin Media customers (76%) were more likely to say they were satisfied with the ease of finding provider contact details (vs. 69% sector average), and BT customers were less likely to be satisfied (58% vs. 69%).

[40] The measure 'Ease of getting through to the right person' was asked of those who contacted customer services by phone.

Sky customers were also more likely to say they were satisfied with their provider calling back when they said they would (60% vs. 44% overall), with no other variations for this measure.

Six in ten customers who contacted their broadband provider by phone were satisfied with the ease of getting through to the right person (61%), with higher satisfaction among those customers who contacted Sky (74%), and lower satisfaction among those who contacted BT (51%) or TalkTalk (52%).

There was no change since 2014 for the sector as a whole or for any of the individual providers' satisfaction ratings for any of the satisfaction measures shown in Figure 38.

Figure 38: Satisfaction with contacting customer service: 2013-2015

% satisfied (giving a rating of 7-10)	Sector average			BT			Sky			TalkTalk			Virgin Media		
	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015
Ease of finding provider contact details	68	68	69	65	59	58 *L*	70	74	79 *H*	64	64	64 =	73	77	76 *H*
Calling you back when they said they would	43	45	44	42	43	38 =	47	52	60 *H*	40	41	39 =	43	43	37 =
Ease of getting through to the right person (phone only)	59	61	61	52	50	51 *L*	69	70	74 *H*	55	58	52 *L*	69	68	65 =

Q4. How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied (prompted responses, single coded)
Base: All UK households who contacted their broadband provider/ who contacted by phone (In 2015 – 1600/ 1465 Total, 400/ 374 BT, 400/ 369 Sky, 400/ 361 TalkTalk, 400/ 361 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015
↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level
=/ *H*/ *L* Indicates that the provider's measure did not differ/ was higher/ was lower compared to the sector average in 2015

Satisfaction with speed of customer service

Three in five customers continued to be satisfied with the speed of customer services, with higher than average satisfaction among Sky customers

Figure 39 shows the percentage of customers stating that they were satisfied (giving a rating of 7-10) with two specific measures relating to the speed of customer service[41].

Three in five customers who contacted their broadband provider were satisfied with both the speed of answering the phone (60%) and the time taken to handle the issue (60%). In 2015, BT broadband customers were less likely to say they were satisfied with the speed of answering the phone (52% vs. 60%) compared to the sector overall, while Sky customers were more likely to say they were satisfied with this aspect (70% vs. 60%)

Sky customers were also more likely to say they were satisfied with the time taken to handle the issue (71% vs. 60%) compared to the sector overall, while TalkTalk customers were less likely to say they were satisfied with this aspect (48% vs. 60%).

There were no changes in either the sector average or individual provider scores from 2014 for either measure.

Figure 39: Satisfaction with the speed of customer service: 2013-2015

% satisfied (giving a rating of 7-10)	Sector average			BT			Sky			TalkTalk			Virgin Media		
	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015
Speed of answering phones (phone only)	59	60	60	55	49	52 *L*	65	67	70 *H*	56	59	55 =	65	66	63 =
The time taken to handle issue	59	61	60	55	53	54 =	66	67	71 *H*	55	55	48 *L*	68	68	65 =

Q4. How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied (prompted responses, single coded)
Base: All UK households who contacted their broadband provider/ who contacted by phone (In 2015 – 1600/ 1465 Total, 400/ 374 BT, 400/ 369 Sky, 400/ 361 TalkTalk, 400/ 361 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015

↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level

=/ *H*/ *L* Indicates that the provider's measure did not differ/ was higher/ was lower compared to the sector average in 2015

[41] The measure 'Speed of answering the phone' was asked of those who contacted customer services by phone

Satisfaction with advice from customer service

In 2015, Sky customers were the most likely to say they were satisfied with the standard of advice from customer service, TalkTalk customers were the least likely

Customers who contacted their broadband provider in the three months prior to the interview (July to September 2015) were asked to rate their satisfaction with three aspects relating to the standard of advice from their broadband provider (Figure 40).

Satisfaction with the standard of advice from the broadband provider's customer service was consistent across each of its three constituent elements, as in previous years. At least three in five customers were satisfied that the advice/ information was easy to understand (65%), useful (63%), and with getting the issue resolved to their satisfaction (63%).

Compared to the sector overall, in 2015 Sky broadband customers were more likely to say they were satisfied that the advice/ information was easy to understand (76% vs. 65%), that the advice/ information was useful (75% vs. 63%) and with getting the issue resolved to their satisfaction (75% vs. 63%). In 2014, Virgin Media customers were more likely to be satisfied with some aspects of the standard of advice from customer service, but no difference was evident in 2015.

Compared to the sector overall, in 2015 TalkTalk customers were less likely to say they were satisfied that the advice/ information was easy to understand (54% vs. 65%), that the advice/ information was useful (50% vs. 63%) and with getting the issue resolved to their satisfaction (52% vs. 63%). BT customers were also less likely to say they were satisfied with getting the issue resolved to their satisfaction (54% vs. 63%).

There were no changes in either the sector average or individual provider scores from 2014 for any of these three measures.

Figure 40: Satisfaction with the standard of advice from customer service: 2013-2015

% satisfied (giving a rating of 7-10)	Sector average			BT			Sky			TalkTalk			Virgin Media		
	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015
Advice/ information was easy to understand	64	67	65	61	63	59 =	71	74	76 *H*	58	57	54 *L*	70	71	70 =
Advice/ information was useful	62	63	63	59	56	57 =	66	70	75 *H*	57	55	50 *L*	68	70	67 =
Getting the issue resolved to your satisfaction	62	64	63	60	57	54 *L*	67	69	75 *H*	59	59	52 *L*	67	71	68 =

Q4. How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied (prompted responses, single coded)
Base: All UK households contacting broadband provider (In 2015 – 1600 Total, 400 BT, 400 Sky, 400 TalkTalk, 400 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015
↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level
=/ H/ L Indicates that the provider's measure did not differ/ was higher/ was lower compared to the sector average in 2015

Satisfaction with customer service advisor

Marked differences in satisfaction with the customer service advisor by provider in 2015, with higher levels of satisfaction among Sky customers

Customers who contacted their broadband provider in the three months prior to the interview were asked to rate their satisfaction with the customer service advisor for six individual measures. These measures are shown in Figure 41. There were no changes in either the sector average or individual provider scores from 2014 for any of the six measures shown.

In 2015, as in previous years, for the broadband sector overall, satisfaction was highest for courtesy and politeness of advisors (75%), and lowest for the advisor logging query details to avoid having to repeat yourself (59%). In 2015 compared to the sector average overall, Sky broadband customers were more likely to be satisfied for all six measures: courtesy and politeness of advisors (84% vs. 75% overall), advisors' ability to understand the issue and identify the problem (79% vs. 66%), advisor taking the issue/question seriously (80% vs. 70%), keeping you informed throughout the process (79% vs. 66%), doing what they said they would do (80% vs. 66%) and for the advisor logging query details (73% vs. 59%).

Compared to the sector overall, Virgin Media customers were more likely to be satisfied in the advisor's ability to understand the issue and identify the problem (71% vs. 66%).

In contrast, TalkTalk customers were less likely to be satisfied in 2015 for four measures: courtesy and politeness of advisors (66% vs. 75% overall), advisors' ability to understand the issue and identify the problem (55% vs. 66%), advisor taking the issue/question seriously (61% vs. 70%) and for the advisor logging query details (50% vs. 59%).

Compared to the sector overall, BT customers were less likely to be satisfied in the advisor's ability to understand the issue and identify the problem (56% vs. 66%) and for the advisor logging query details (50% vs. 59%).

Figure 41: Satisfaction with the customer service advisor: 2013-2015

% satisfied (giving a rating of 7-10)	Sector average			BT			Sky			TalkTalk			Virgin Media		
	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015
Courtesy and politeness of advisors	76	77	75	76	73	69 =	80	80	84 *H*	71	73	66 *L*	79	82	79 =
Advisor ability to understand the issue and identify the problem	64	66	66	60	59	56 *L*	73	74	79 *H*	58	56	55 *L*	72	74	71 *H*
Advisor took my questions/ issue seriously	70	71	70	67	65	62 =	75	76	80 *H*	66	64	61 *L*	74	78	74 =
Keeping you informed throughout the process	63	67	66	60	59	61 =	70	75	79 *H*	60	61	57 =	69	71	67 =
Advisor doing what they said they would do	66	68	66	62	62	58 =	73	75	80 *H*	63	62	59 =	72	74	68 =
Logging of query details to avoid having to repeat yourself	58	58	59	56	50	50 *L*	65	65	73 *H*	50	50	50 *L*	65	65	59 =

Q4. How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied (prompted responses, single coded)
Base: All UK households who contacted their broadband provider (In 2015 – 1600 Total, 400 BT, 400 Sky, 400 TalkTalk, 400 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015

↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level

=/ H/ L Indicates that the provider's measure did not differ/ was higher/ was lower compared to the sector average in 2015

Satisfaction with other aspects of customer service

Sky customers were more likely to be satisfied with their provider in relation to offering compensation or a goodwill payment and for willingness to help resolve the issue, while BT and TalkTalk customers were less likely

Figure 42 shows the percentage of satisfied customers for more general customer service attributes. While most customers who contacted their broadband provider were satisfied with the willingness to help resolve the issue (67%), fewer were satisfied with the provider in relation to offering compensation or a goodwill payment (35%).

Compared to the sector overall, Sky customers were more likely to be satisfied with the provider in relation to offering compensation or a goodwill payment (52% vs. 35% overall) and satisfaction among Sky customers increased for this measure from 2014 (52% vs. 41% in 2014). Sky customers were also more likely than the sector average to be satisfied with the willingness to help resolve the issue (80% vs. 67%).

By contrast, both BT and TalkTalk customers were less likely to be satisfied compared to the sector overall for both measures. Around one in four BT (25%) and TalkTalk (27%) customers were satisfied with the provider in relation to offering compensation or a goodwill payment (vs. 35% overall) and around three in five BT (59%) and TalkTalk (58%) customers were satisfied with the willingness to help resolve the issue (vs. 67% overall).

There were no changes in either the sector average or any other individual provider scores since 2014 for either of these measures.

Figure 42: Satisfaction with other aspects of customer service: 2013-2015

% satisfied (giving a rating of 7-10)	Sector average			BT			Sky			TalkTalk			Virgin Media		
	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015
Offering compensation or a goodwill payment	32	32	35	24	23	25 *L*	43	41	52↑ *H*	31	26	27 *L*	40	38	34 =
Willingness to help resolve your issue	67	68	67	65	63	59 *L*	72	73	80 *H*	61	60	58 *L*	72	76	69 =

Q4. How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied (prompted responses, single coded)
Base: All UK households who contacted their broadband provider (In 2015 – 1600 Total, 400 BT, 400 Sky, 400 TalkTalk, 400 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015

↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level

=/ H/ L Indicates that the provider's measure did not differ/ was higher/ was lower compared to the sector average in 2015

Future use of provider based on experience

Likelihood of using a broadband provider as a result of their recent customer service experience is unchanged from 2014

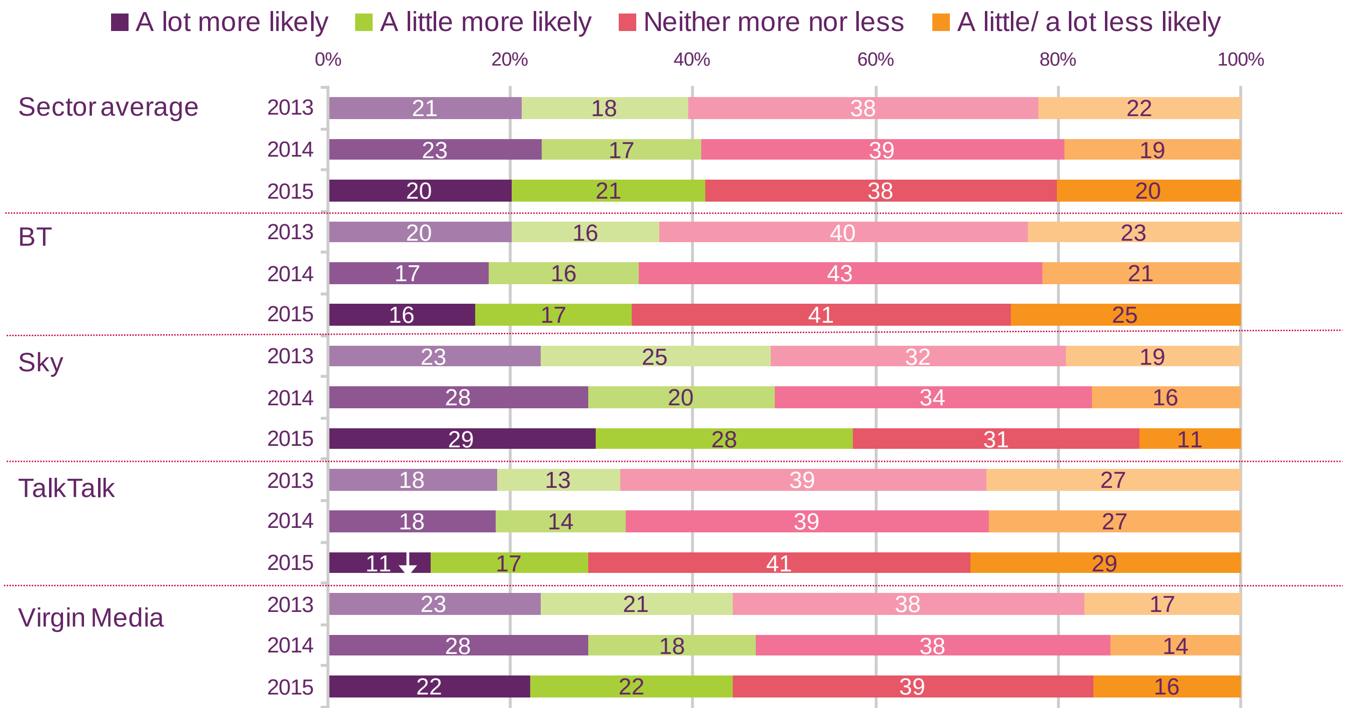
Customers who contacted their broadband provider were asked whether their most recent customer service experience has made them more or less likely to use their broadband provider in the future. Results are shown at an overall level and by provider for 2013, 2014 and 2015 in Figure 43.

Among customers who contacted their broadband provider, one in five said they were now a lot more likely to use their broadband provider again (20%) with the same proportion saying they were now a little or a lot less likely (20%).

In 2015, compared to the sector overall it was less common for TalkTalk customers to say they were 'a lot more likely' to use their broadband provider in future based on their recent experience (11% vs. 20%).

Compared to 2014, there was no change in the likelihood of future use for the sector as a whole. The differences detailed above compared to the sector overall for Sky and TalkTalk customers in 2015 are also year-on-year changes for those providers from 2014.

Figure 43: Future use of provider given customer service experience - broadband: 2013-2015



Q7. Has your experience of [PROVIDER]'s customer service for this issue made you more or less likely to use [PROVIDER] in the future? (prompted responses, single coded)
Base: All UK households who contacted their broadband provider (In 2015 – 1600 Total, 400 BT, 400 Sky, 400 TalkTalk, 400 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015.

↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level

Section 6

Mobile phone sector

This section looks in detail at the mobile phone sector. It shows, where possible, how each provider included (3/Three, EE, O_2, Virgin Mobile and Vodafone) performed in 2015 against key measures such as:

- incidence of contact about mobile
- incidence of complaints
- issue type
- whether the issue was completely resolved
- time taken to resolve the issue
- satisfaction with customer service
- future use based on customer service experience

For each measure this section shows how the provider performed in 2015 against the overall mobile network sector average. This section also shows, where possible, how the sector average and the provider-specific measures in 2015 compared to those in 2014. The longer term trend is also reported, where appropriate. Inclusion in this research did not necessarily mean a high level of complaints.

Where we report a provider's position as in line with the sector average, we mean there is no statistically significant difference between that average and that provider. There may, nonetheless, be statistically significant differences between providers whose positions are reported as each in line with the sector average.

As outlined earlier, in previous years within the mobile phone sector we reported on satisfaction with customer services for Orange and T-Mobile customers separately. Satisfaction among EE mobile phone customers was not reported in previous years as market share was below the 4% threshold for inclusion. It was felt inappropriate to merge findings for these providers previously, as Ofcom had no evidence to suggest customers were dealt with by the same customer service team.

Since 2014 however, it was decided to report on satisfaction with customer services for EE overall based on combining the responses from customers of each of the three brands EE, Orange and T-Mobile within the mobile phone sector. This decision was taken as Ofcom was advised by EE that customers of these three brands were dealt with by the same customer service team. For reasons of space, rather than show comparable findings for Orange and T-Mobile from previous years within relevant Figures in this section, we have referenced findings from 2013 and 2012 for these providers within the footers of those Figures.

References in this section of the report relating to all mobile providers collectively relate to those mobile providers included in this 2015 study (i.e. 3/ Three, EE, O_2, Virgin Mobile and Vodafone). These same providers were included in the 2014 study.

Recent contact with provider

One in five customers had contacted their mobile phone provider in the three months prior to the interview

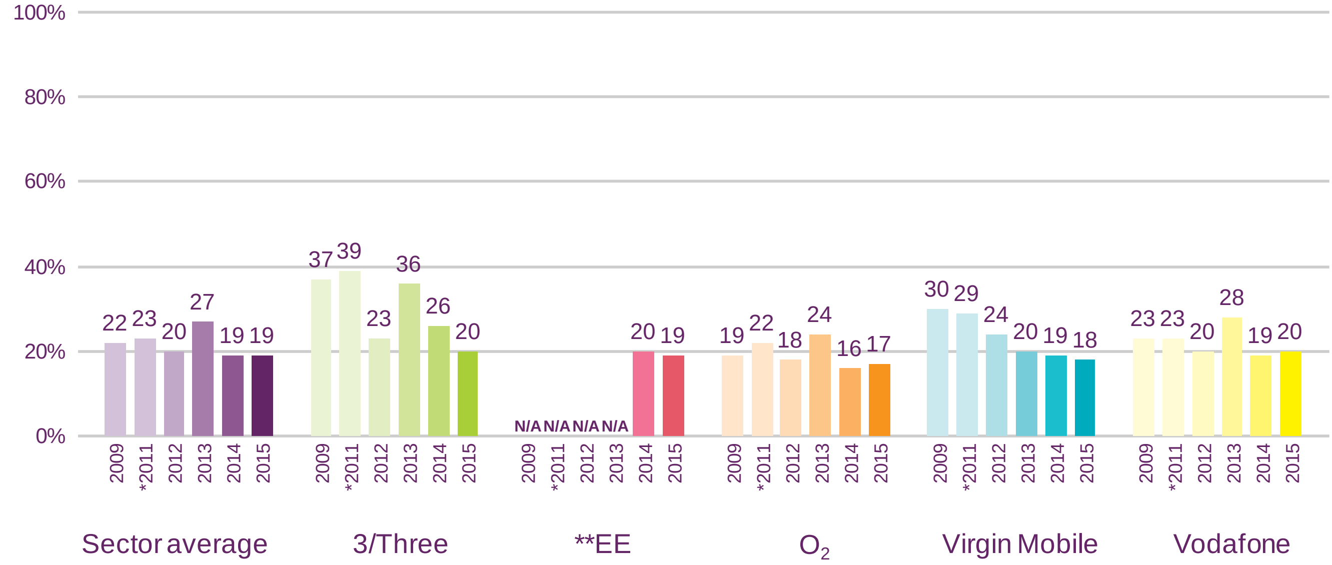
Figure 44 shows the proportion of customers that had made contact (by telephone, email, webchat or letter)[42], in the three months prior to the interview[43], with any of the five mobile phone network providers. This contact was either regarding a specific issue relating to their mobile phone or a more general issue that applied to all the services they may take with that provider[44].

In 2015, almost one in five (19%) of all UK households who used one of the five mobile phone network providers had contacted their provider in the three months prior to the interview. This measure did not differ by network provider compared to the sector average[45].

The overall measure of contact with mobile phone providers in 2015 is identical to that from 2014 (at 19%) and is also unchanged for each of the mobile phone network providers. The decrease between 2013 (27% contact) and 2014 (19%) has therefore been sustained.

[42] Prior to 2014 respondents were only asked about contact by telephone or email, with contact by webchat or letter added in 2014, so data from previous years is not directly comparable
[43] With the data from this measure coming from the omnibus study this meant that the contact was between May and October 2015
[44] So for example, if a customer had their mobile phone and broadband service provided by Virgin and they did not say their most recent contact was regarding the mobile phone specifically, then they were asked whether it was a general issue that applied to both their mobile phone and broadband service
[45] This is indicated by the '=' symbols appearing for each provider in the box below the chart within Figure 44. This convention was included across several of the Figures in this and subsequent sections. If in 2014, for a given measure a provider performed better than the sector average the box below the chart will show 'HIGHER' for that particular provider and if a provider performed worse then it will show 'LOWER'

Figure 44: Proportion of customers who contacted their mobile phone network provider in the three months prior to the interview: 2009, 2011, 2012, 2013, 2014 and 2015[46]



PROVIDER LEVEL VS. 2015 SECTOR AVERAGE	=	=	=	=	=

Q6. Thinking of [PROVIDER] and the services you buy from them, have you contacted them in the last 3 months by telephone, email, webchat or letter? (spontaneous responses, single coded) NB – Prior to 2014 respondents were only asked about contact by telephone or email, with contact by webchat or letter added since 2014 so data is not directly comparable *In 2011, two waves of research were conducted and the data shown relates to Q3. **The data shown for EE in 2014 and 2015 included households that used either EE, Orange or T-Mobile – the equivalent measures from 2012/ 2013 were 18%/ 28% for Orange and 22%/ 26% for T-Mobile
Base: All UK households who used mobile phone network providers (In 2015 – 3033 Total, 386 3/Three, 1076 EE, 840 O_2, 251 Virgin Mobile, 480 Vodafone)
Source: Ofcom research, omnibus survey, fieldwork carried out by Saville Rossiter-Base in August, September and November 2015

↑↓ Indicates a significant increase/ decrease compared to 2014 at the 99% confidence level.

[46] The 2014 sector average in Figure 44 excludes those providers covered in the Stage 1 omnibus survey that were not subsequently covered in the Stage 2 online survey (because fewer than 35 interviews were conducted with customers who made contact with the provider in the previous three months). If all Stage 1 providers were included, the 2014 sector average in Figure 44 would be unchanged at 19%.

Proportion of complaints

There was no change in the proportion of contacts with mobile phone providers considered to be complaints from 2014

Since the 2011[47] surveys, those customers that had contacted their mobile phone network provider (in the previous three months[48]) were asked whether they considered the reason for this contact to be a complaint[49]. Figure 45 shows that overall one in four contacts (27%) were considered to be complaints.

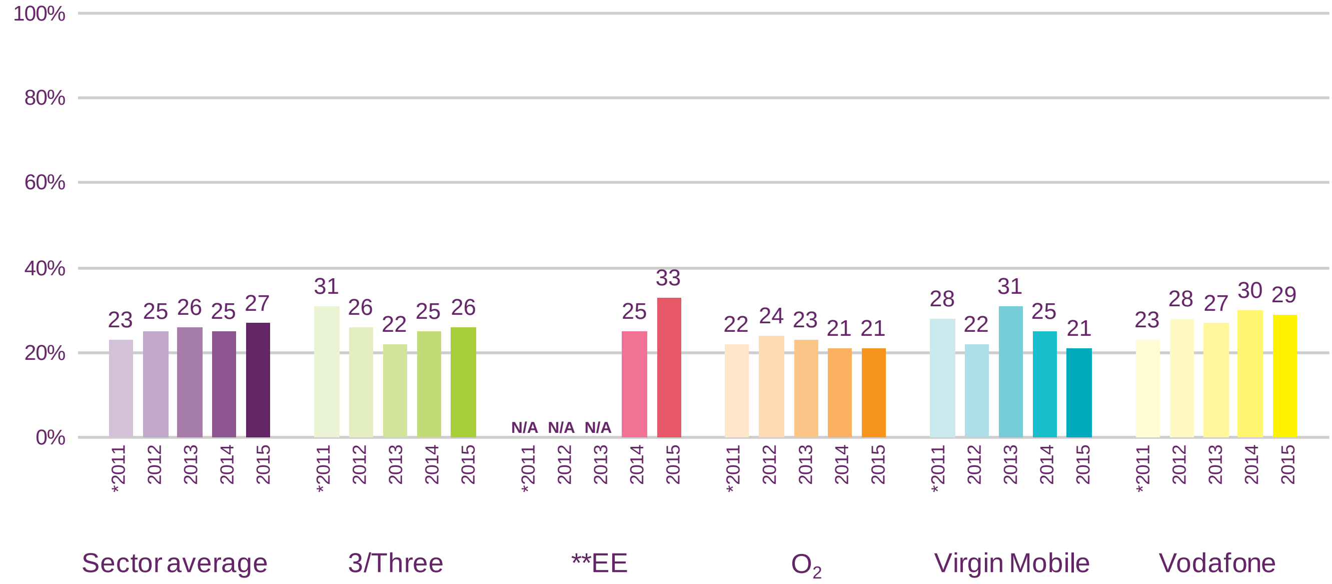
Unlike overall contact (shown in Figure 44), this incidence showed some variation by provider in 2015; with EE customers more likely to have contacted their provider with a complaint compared to the overall mobile sector average (33% vs. 27%).

As with overall contact (shown in Figure 44) there was no change since 2014 in the proportion of contacts considered to be complaints for the mobile phone sector overall. There was also no change compared to 2014 in the proportion that were complaints for any of the individual mobile phone network providers, where it was possible to draw comparisons.

Any change in the levels of satisfaction since 2014 among mobile phone network customers at an overall level or among customers of any particular provider cannot be said to be due to an increase or decrease in the incidence of complaints.

[47] The question to establish whether the reason for contact was considered to be a complaint was only included in the study since 2011, hence no data being shown for 2009
[48] With the data for this measure coming from the online study this meant the contact was between July and September 2015
[49] Respondents were not prompted with a definition of a complaint, this was therefore self-defined by the respondent

Figure 45: Proportion of recent contacts with mobile providers considered by the customer to be a complaint: 2011-2015



PROVIDER LEVEL VS. 2015 SECTOR AVERAGE	=	***HIGHER***	=	=	=

Q5a. And in your opinion, was the reason for this contact with [PROVIDER] a complaint, or something else? (prompted responses, single coded) *In 2011, two waves of research were conducted and the data shown relates to Q3. **The data shown for EE in 2014 and 2015 included households that used either EE, Orange or T-Mobile - The equivalent measures from 2012/ 2013 were 22%/28% for Orange and 28%/ 24% for T-Mobile
Base : All UK households who contacted their mobile phone network providers (In 2015 – 1600 Total, 200 3/Three, 400 EE, 400 O_2, 200 Virgin Mobile, 400 Vodafone)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015.

↑↓ Indicates a significant increase/ decrease compared to 2014 at the 99% confidence level.

Most recent contact by issue type

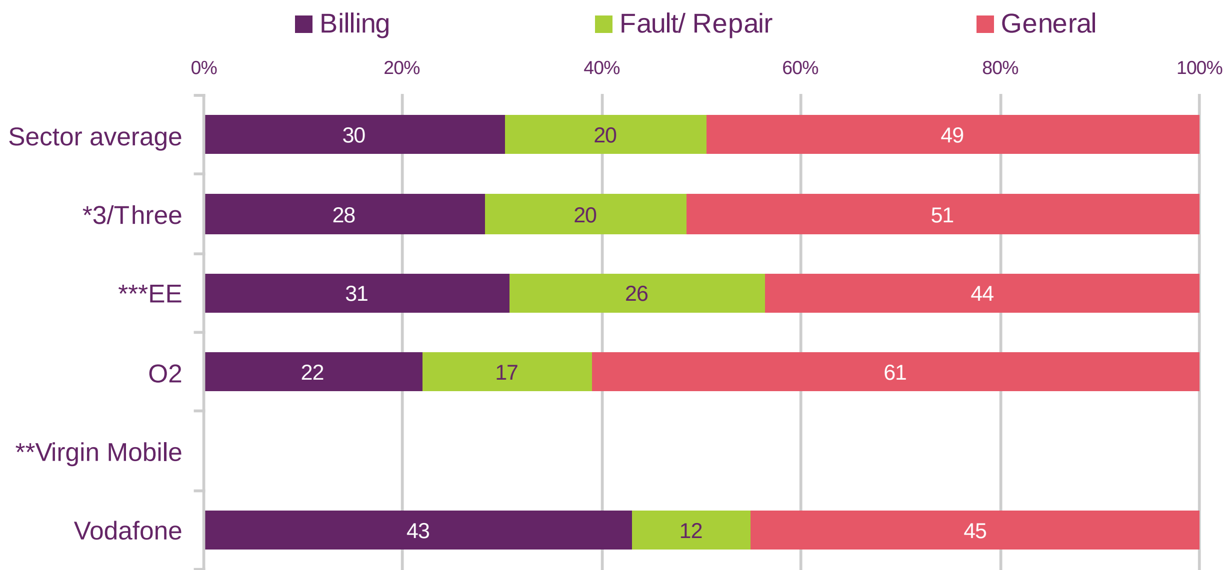
There was no change from 2014 in the type of issue that customers were contacting their mobile phone network provider about

Customers were prompted with a list of seven possible reasons for contacting their mobile phone network provider, and asked to say which one reason applied to their most recent contact. These seven possible responses were then grouped into three distinct categories: a billing issue, a fault or repair issue or a general enquiry issue.

Figure 46 shows the incidence of the three types of issue in 2015. Across all mobile phone network providers included in this report, it was more common for recent contact to relate to a general enquiry issue (49%), than about either a billing issue (30%) or a fault/ repair issue (20%). In 2015 the incidences of the three types of issue did not vary significantly for any of the five network providers compared to the sector average[50].

From 2014, where base sizes allow the comparison, there was no change in the type of issue mobile phone network providers were contacted about.

Figure 46: Type of issue for most recent contact with mobile phone network provider: 2015



Q8. Thinking of the most recent issue you had to contact [PROVIDER] about, which one of the following categories did the issue fall into? Was it to do with..... ? (prompted responses, single coded) *Caution: Base below 100,**Base below 50, not reported ***The data shown for EE in 2014 and 2015 included households that used either EE, Orange or T-Mobile - The equivalent measures from 2013 were 40% Billing/ 22% Fault & repair/ 39% General for Orange and 33% Billing/ 16% Fault & repair/ 52% General for T-Mobile
Base: All UK households who contacted their mobile phone network provider (In 2015 – 551 Total, 72 3/Three, 189 EE, 143 O_2, 47 Virgin Mobile, 100 Vodafone)
Source: Ofcom research, omnibus survey, fieldwork carried out by Saville Rossiter-Base in August and September 2014

↑↓ Indicates significantly higher/ lower than sector average at the 99% confidence level.

[50] The number of interviews conducted on the omnibus study among 3/Three customers who made contact with their mobile provider was between 50 and 100 interviews and should therefore be treated with caution. The results for Virgin Mobile customers who made contact with their provider from the omnibus are not shown as they totalled under 50 interviews.

Key issues by contact type

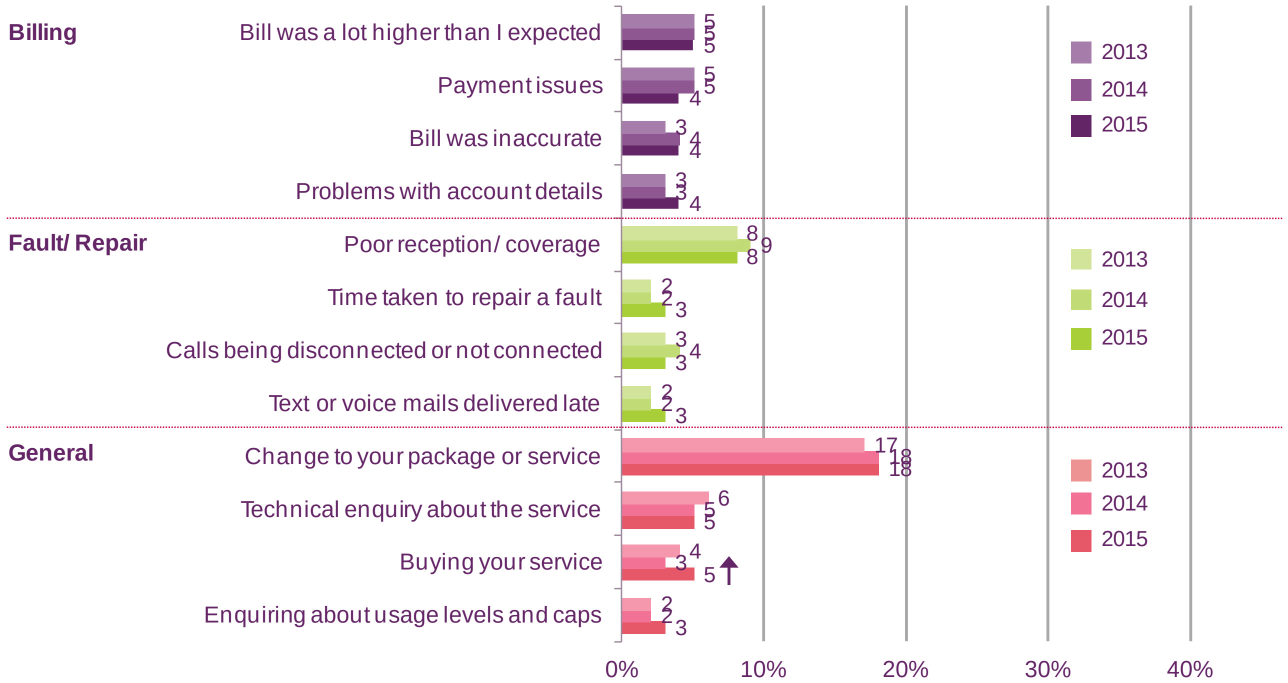
The most common reason for contacting the mobile phone network provider was to make a change to the package or service

Figure 47 shows the top four reasons for recent contact with service providers, by each issue type[51]. No single reason accounted for the majority of contacts from mobile phone network customers to their provider in 2015, as in 2014 and 2013.

The most commonly mentioned reason for contacting their provider was to make a change to the package or service (18%) in terms of upgrading or downgrading it, followed by contact about poor reception/ coverage (8%).

Reasons for the recent contact in 2015 were broadly unchanged since 2014, apart from an increase in contact about buying the service (5% vs. 3%).

Figure 47: Mobile phone – Top 4 issues per contact type: 2013-2015



S7a-c. And more specifically, which of the following best describes what the issue with [PROVIDER] was concerning? (prompted responses, single coded)
Base: All UK households who contacted their mobile phone network provider (In 2013 – 2002 Total, In 2014 – 1600 Total, In 2015 – 1600 Total)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015.
↑↓ Indicates a significant increase/ decrease compared to 2014 at the 99% confidence level.

[51] Respondents were shown a different list of reasons to choose from dependent on whether they said their most recent contact was regarding a billing, fault and repair or general issue. To enable a comparison the data in Figure 47 has been expressed as a proportion of all those that contacted their mobile phone network provider in the last 3 months (July to September 2015)

Number of contacts

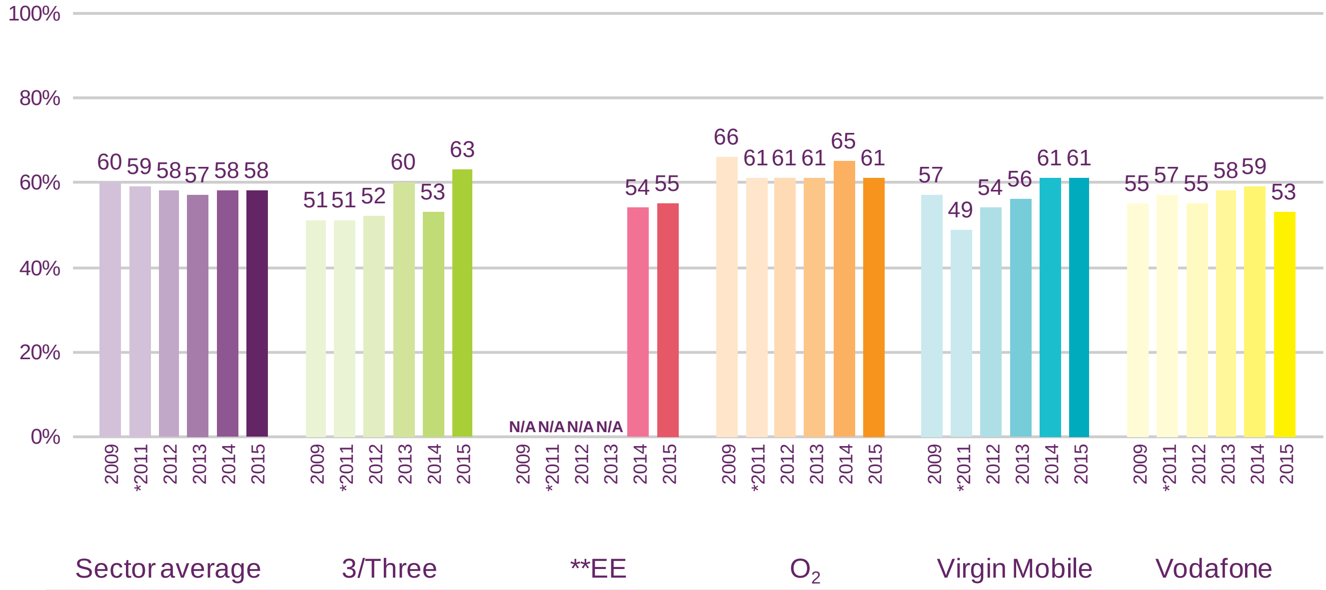
A minority of customers who contacted their mobile phone network provider required more than one contact

Customers were asked how many times they had been in contact, so far, with their mobile phone network provider about their most recent issue. Figure 48 shows the proportion that had only been in contact once with their mobile phone network provider, at an overall sector level and by provider (between 2009 and 2015).

Over half (58%) of customers who contacted their mobile phone network provider, only made contact on one occasion and this incidence did not vary in 2015 for any of the five providers compared to this sector average. There was no change from 2014 in the proportion of customers who had only been in contact once with their mobile phone network provider, either at on overall sector level or by provider.

Those customers who did not feel their issue was a complaint were more likely to have contacted their mobile phone network provider only once compared to those making contact with a complaint (65% vs. 39% for those with a complaint).

Figure 48: Proportion in contact one time with the provider – mobile phone: 2009, 2011, 2012, 2013, 2014 and 2015



	3/Three	**EE	O_2	Virgin Mobile	Vodafone
PROVIDER LEVEL VS. 2015 SECTOR AVERAGE	=	=	=	=	=

Q6. How many times have you been in contact with [PROVIDER] in relation to this particular issue so far? (prompted responses, single coded) *In 2011, two waves of research were conducted and the data shown relates to Q3. **The data shown for EE in 2014 and 2015 included households that used either EE, Orange or T-Mobile - The equivalent measures from 2012/ 2013 were 60%/ 52% for Orange and 59%/ 57% for T-Mobile

Base: All UK households who contacted their mobile phone network provider (In 2015 – 1600 Total, 200 3/Three, 400 EE, 400 O_2, 200 Virgin Mobile, 400 Vodafone)

Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015.

↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level.

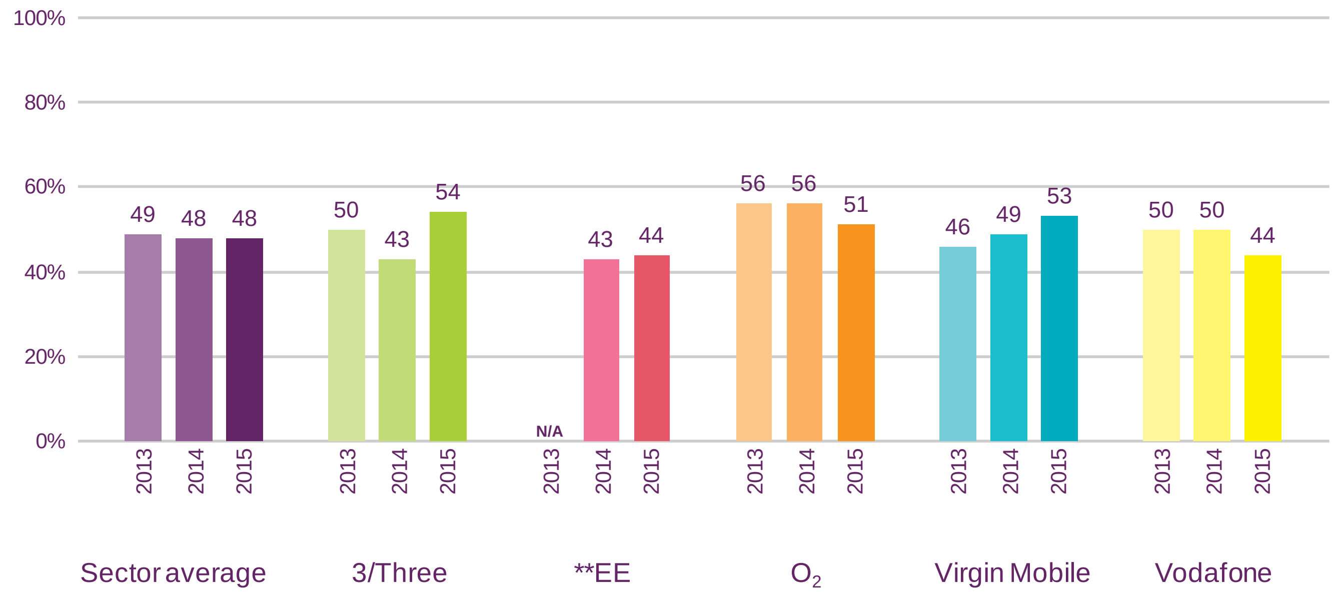
Issue resolution

Around half of customers felt their issue had been completely resolved in one contact

Those that had contacted their mobile phone network provider in the three months prior to the interview (July to September 2015) were asked the extent to which they felt the issue they contacted their provider about had been resolved. Respondents were given the choice of whether the issue had been fully resolved, partially resolved or if it was still unresolved (as defined by the respondent). Figure 49 shows the proportions in 2013, 2014 and 2015 who considered their issue completely resolved[52] in one contact[53].

As shown in Figure 49, in 2015, around half (48%) of customers who contacted their mobile phone provider in the three months prior to the interview considered their issue completely resolved in the first contact. In 2015 no individual provider performed significantly better or worse than the sector average. Compared to 2014, there was no change at the overall sector level or for any of the providers shown.

Figure 49: Proportion whose issue was completely resolved in one contact – mobile phone: 2013-2015



PROVIDER LEVEL VS. 2015 SECTOR AVERAGE	=	=	=	=	=

Q6. How many times have you been in contact with [PROVIDER] in relation to this particular issue so far? (prompted responses, single coded) *In 2011, two waves of research were conducted and the data shown relates to Q3. **The data shown for EE in 2014 includes households that use either EE, Orange or T-Mobile. In 2013 the equivalent measures were 43% Orange and 47% T-Mobile.
Base: All UK households contacting mobile phone network provider (In 2015 – 1600 Total, 200 3/Three, 400 EE, 400 O_2, 200 Virgin Mobile, 400 Vodafone)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015.

↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level

[52] It was decided since 2013 to report on complete resolution as issues that were 'partly' resolved may go on to be completely resolved or may remain only partly resolved
[53] Since 2014 it was decided to report on those who had their issue resolved in one contact (as opposed to those who felt their issue was resolved across several contacts) as this would not be influenced by the date of their initial contact (which could have been anytime between July and September 2015)

Customers contacting their mobile phone provider with a billing enquiry issue were less likely to feel this issue was completely resolved in one contact

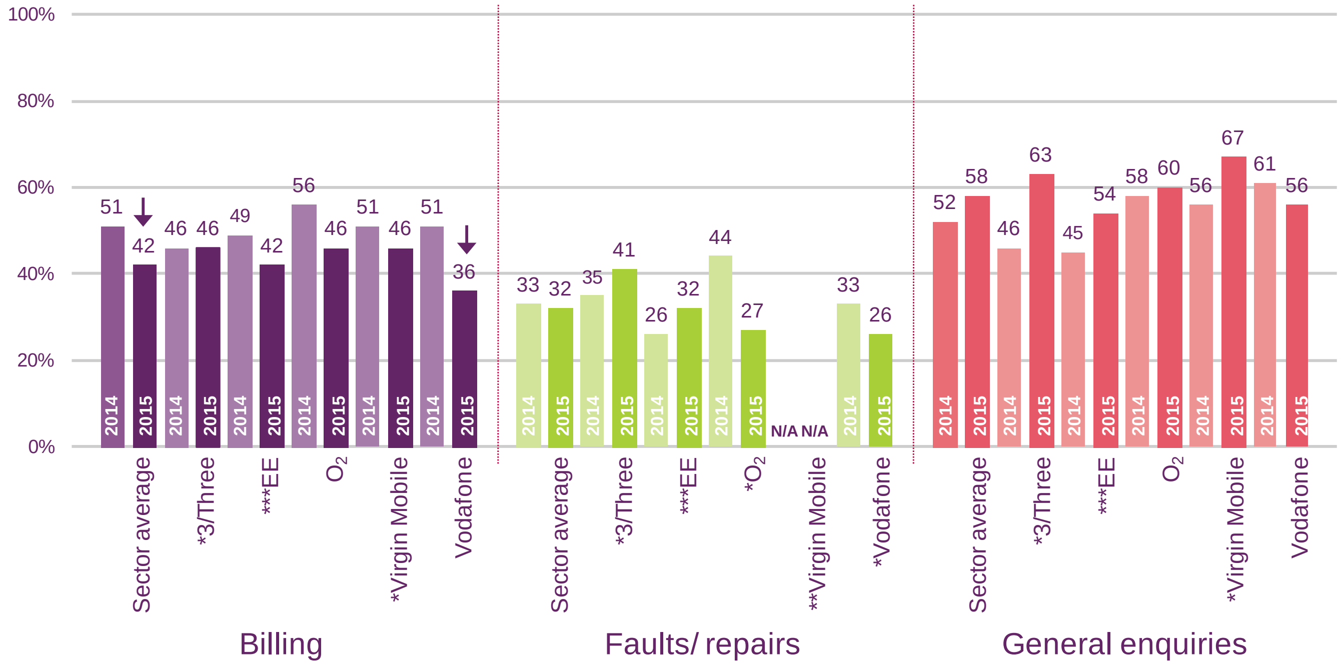
Figure 50 shows the proportion in 2014 and 2015 who contacted their mobile phone provider in the three months prior to the interview with a billing or fault/ repair or a general enquiry issue and who considered the issue completely resolved in one contact.

In 2015, over half of customers who contacted their mobile phone provider with a general enquiry issue (58%) felt their issue had been completely resolved in one contact. One in three customers who recently contacted their mobile phone provider with a fault/ repair issue said their issue was completely resolved in this first contact (32%). Both of these measures are unchanged since 2014. Four in ten customers who recently contacted their mobile phone provider with a billing issue (42%) said their issue was completely resolved in this first contact, which is a decrease since 2014 (from 51%). This overall decrease in billing issues being completely resolved in one contact in 2015 is evident for those calling Vodafone with a billing issue (36% vs. 51% in 2014).

In 2015, no individual provider performed better or worse than the sector average for each of the three types of enquiry. There were no other significant changes from 2014 in the proportion of customers who felt their issue had been completely resolved in one contact at an overall sector level or by individual provider for any of the three types of issue shown in Figure 50.

While not shown, those that contacted their mobile phone provider with a complaint were less likely to feel that their issue was completely resolved in one contact (31%) compared to those whose issue was not a complaint (54%).

Figure 50: Mobile phone - Whether the issue that the customer contacted their provider about was considered to be completely resolved in one contact, by provider: 2014 and 2015



Q5. In your opinion, was [PROVIDER] able to successfully resolve your issue [BILLING/ FAULT/ GENERAL ENQUIRY]? (spontaneous responses, single coded) *Caution: Base below 100, **Base below 50, not reported ***The data shown for EE in 2014 and 2015 included households that use either EE, Orange or T-Mobile

Base: All UK households who contacted their mobile phone network provider about each type of issue (In 2015 – For billing 611 Total, 65 3/Three, 151 EE, 144 O_2, 68 Virgin Mobile, 163 Vodafone, for faults/ repairs 371 Total, 64 3/Three, 117 EE, 90 O_2, 32 Virgin Mobile, 74 Vodafone for general enquiries 612 Total, 71 3/Three, 132 EE, 166 O_2, 98 Virgin Mobile, 145 Vodafone)

Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015.

↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level

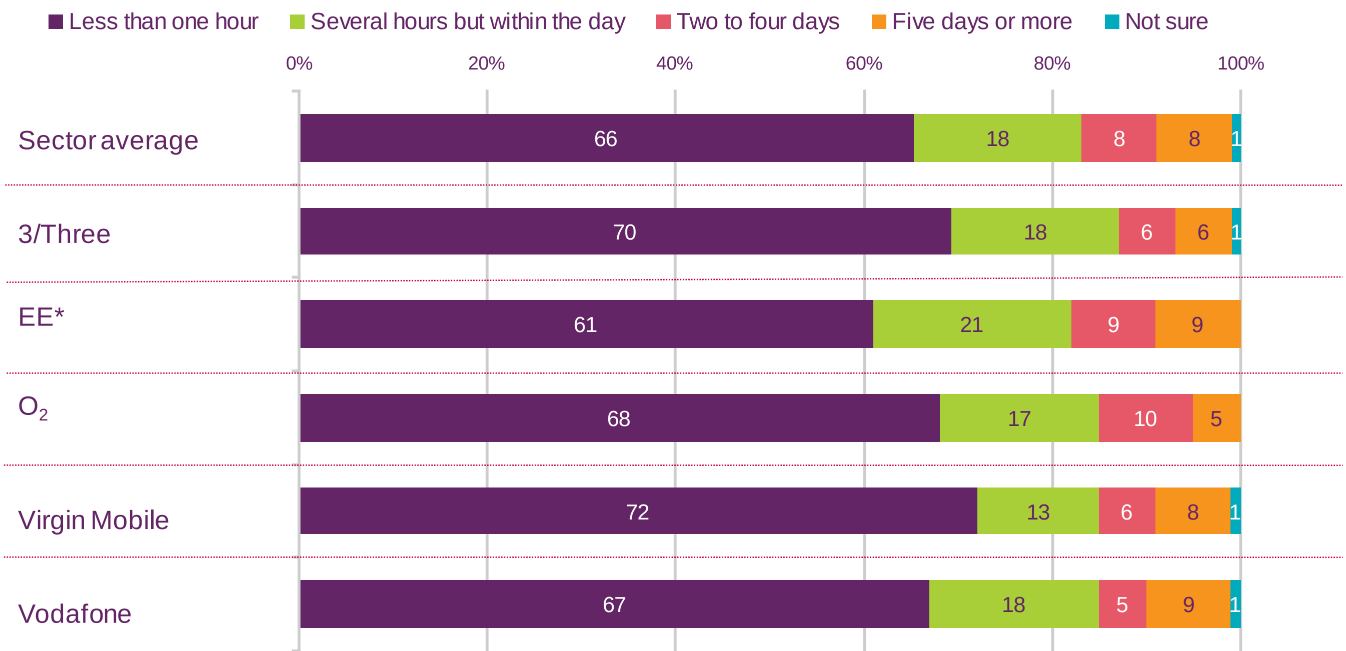
Time taken to resolve the issue

Approximately two-thirds of customers who contacted their mobile provider said their issue had been completely resolved within an hour

Customers who considered their issue to be completely resolved were asked how long it had taken to resolve the issue with their provider. Figure 51 shows the percentage of customers saying that issue resolution had taken less than one hour, several hours but within one day, from two to four days, or five days or more.

Approximately two-thirds of mobile phone customers said that the time taken was less than one hour (66%), with over eight in ten (84%) saying the issue was resolved within the day. Resolution within the hour or within the day did not vary significantly for any of the five providers compared to the sector overall.

Figure 51: Time taken to resolve the issue – mobile phone: 2015



Q10. How long did it take to resolve the issue with [PROVIDER]? (prompted responses, single coded) *The data shown for EE in 2015 included households that use either EE, Orange or T-Mobile.
Base: All UK households contacting mobile phone network whose issue was completely resolved (In 2015 – 1100 Total, 143 3/Three, 262 EE, 293 O_2, 153 Virgin Mobile, 249 Vodafone)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015

↑↓ Indicates significantly higher/ lower that the sector average at the 99% confidence level

Saville Rossiter-Base

Overall satisfaction with provider and with customer service received

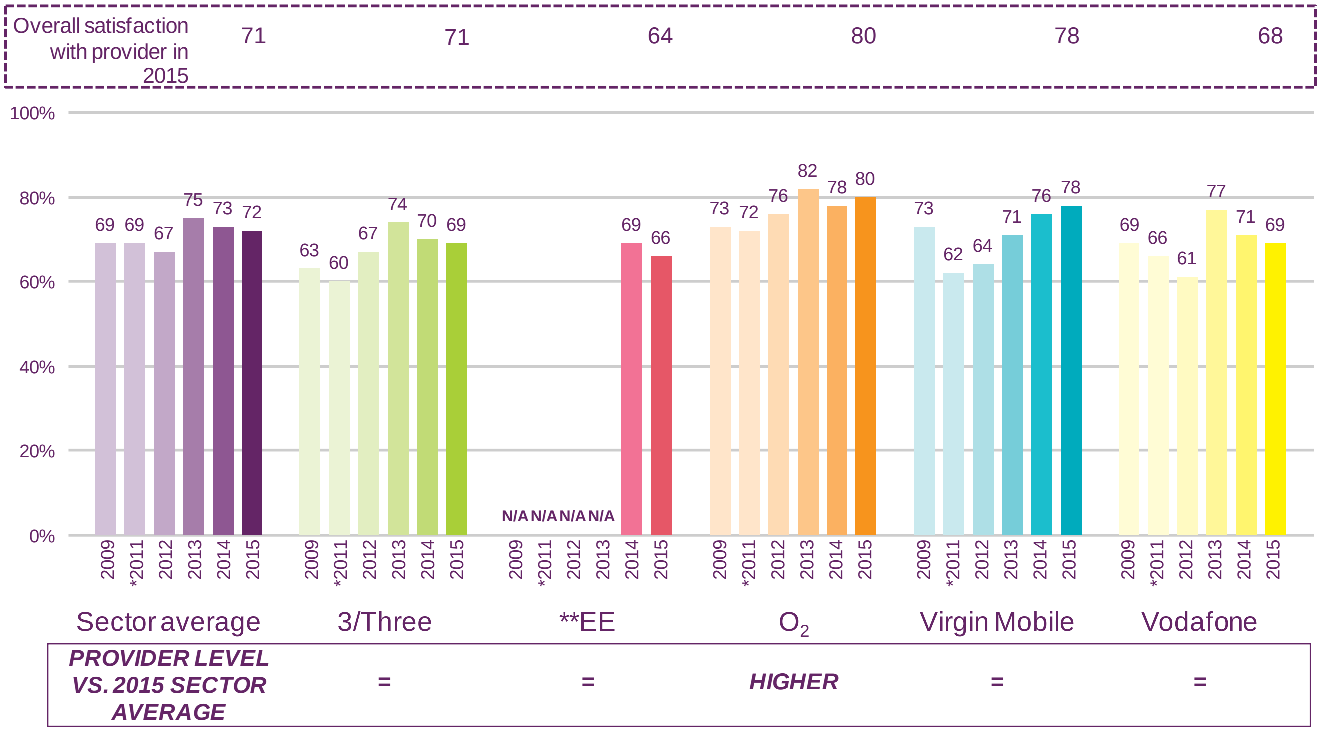
Seven in ten mobile customers making contact with their provider were satisfied with the customer service received, with a higher proportion among O_2 customers

Figure 52 shows levels of overall satisfaction with the mobile phone network providers when the customer was recently in contact. In 2015, three in four customers (72%) who contacted their mobile phone network provider were satisfied with the customer service received. There was no change from 2014 in satisfaction either overall or for any of the individual mobile phone network providers.

In 2015, O_2 customers were more likely than the sector average to say they were satisfied with the customer service received (80% vs. 72%), whereas in 2014 no provider had stood out in terms of higher or lower levels of satisfaction.

Figure 52 also shows (at the top of the Figure) the levels of satisfaction with the mobile phone providers overall, among those recently in contact. In 2015, seven in ten customers (71%) were satisfied overall with their mobile phone providers, unchanged from 2014 (72%). Overall satisfaction with the mobile phone network provider was at a comparable level to satisfaction with the customer service received for the sector as a whole and for each of the mobile phone network providers. O_2 customers were also more likely than the sector average to say they were satisfied with their provider overall (80% vs. 71%).

Figure 52: Satisfaction with customer service from provider – mobile phone: 2009, 2011, 2012, 2013, 2014 and 2015



Q3. Overall how satisfied are you with the service you received from [PROVIDER] customer services on this occasion? (prompted responses, single coded) *In 2011, two waves of research were conducted and the data shown relates to Q3. **The data shown for EE in 2014 and 2015 included households that used either EE, Orange or T-Mobile - The equivalent measures from 2012/ 2013 were 65%/ 67% for Orange and 67%/ 71% for T-Mobile

Base: All UK households who contacted their mobile phone network provider (In 2015 – 1600 Total, 200 3/Three, 400 EE, 400 O_2, 200 Virgin Mobile, 400 Vodafone)

Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015.

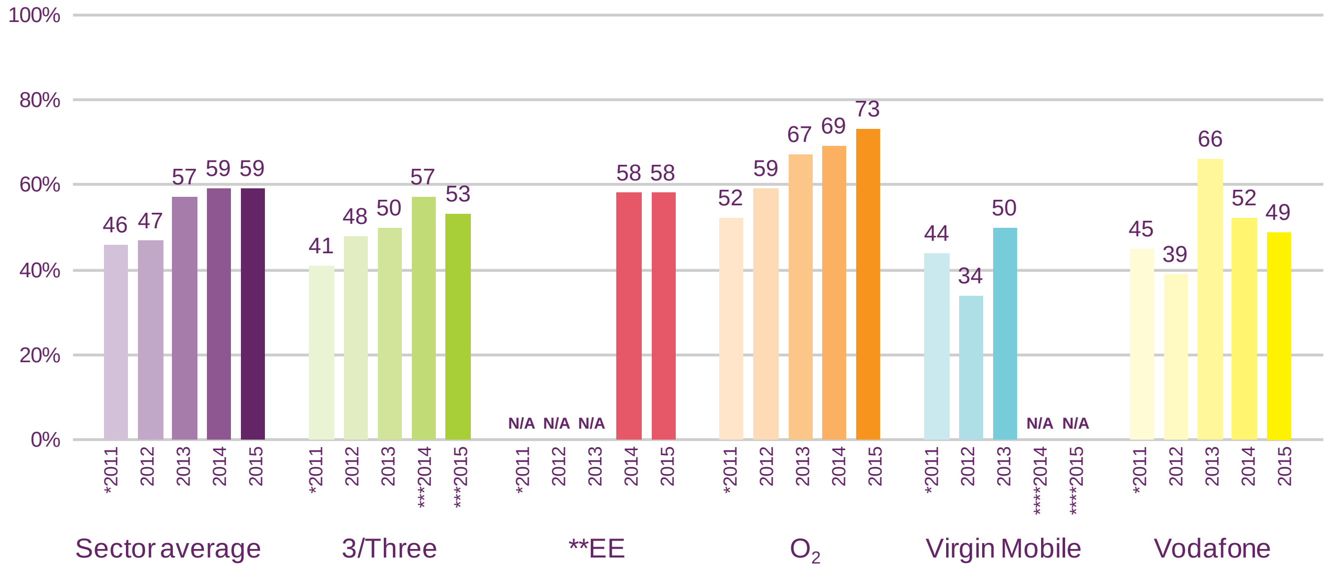
↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level.

Figure 53 shows overall satisfaction with customer service among those customers who contacted their mobile phone network provider with a complaint. Satisfaction was significantly lower (59%) among those who contacted their mobile phone provider with a complaint compared to the average across all contacts (72% as shown in Figure 52), as in previous years.

Satisfaction with customer service among those who contacted their provider with a complaint was higher in 2015 among O_2 customers (73% vs. 59% of all). In 2014, this average for the sector did not vary by provider.

The overall level of satisfaction and the levels for the individual providers among those making contact with a complaint were unchanged from 2014.

Figure 53: Satisfaction with customer service from provider – mobile phone complaints: 2011-2015



PROVIDER LEVEL VS. 2015 SECTOR AVERAGE	3/Three	**EE	O_2	Virgin Mobile	Vodafone
	=	=	HIGHER	=	=

Q3. Overall how satisfied are you with the service you received from [PROVIDER] customer services on this occasion? (prompted responses, single coded) *In 2011, two waves of research were conducted and the data shown relates to Q3. Not asked in 2009. **The data shown for EE in 2014 and 2015 included households that used either EE, Orange or T-Mobile - The equivalent measures from 2012/ 2013 were 43%/ 44% for Orange and 51%/ 55% for T-Mobile ***Caution: Base below 100 ****Caution: Base below 50 not reported
Base: All UK households who contacted their mobile phone network provider with a complaint (In 2015 – 473 Total, 63 3/Three, 141 EE, 106 O_2, 37 Virgin Mobile, 126 Vodafone)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015.

↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level.

Satisfaction with contacting customer service

Levels of satisfaction with contacting customer service were unchanged from 2014, with some variations by provider

Customers who had contacted their mobile phone network provider (either by phone, email, webchat or letter) were asked to rate their satisfaction with various aspects of their provider's customer services on a 10 point scale; where 10 is extremely satisfied and 1 is extremely dissatisfied. Figure 54 shows the percentage of customers stating that they were satisfied (giving a rating of 7-10) for three measures relating to contacting customer services[54].

In 2015, as in previous years, among those who contacted their mobile phone network provider, satisfaction was highest for ease of finding provider contact details (71%) and ease of getting through to the right person (68%), and lowest for calling back when they said they would (46%).

Compared to the sector as a whole, Virgin Mobile customers were more likely to be satisfied with the ease of finding provider contact details (80% vs. 71%) and with the ease of getting through to the right person (78% vs. 68%). Vodafone customers were less likely compared to the sector as a whole to be satisfied with the ease of getting through to the right person (59% vs. 68%). Customers of 3/ Three were more likely to be satisfied with the provider calling back when they said they would (58% vs. 46%).

There was no change in the sector average scores or the scores for any individual provider from 2014 for any of the three measures shown in Figure 54.

Figure 54: Satisfaction with contacting customer service: 2013-2015

% satisfied (giving a rating of 7-10)	Sector average			3/Three			*EE			O_2			Virgin Mobile			Vodafone		
	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015
Ease of finding provider contact details	72	71	71	73	71	74 =	N/A	65	67 =	77	79	76 =	75	78	80 *H*	75	68	66 =
Calling you back when they said they would	47	44	46	45	48	58 *H*	N/A	45	44 =	53	46	49 =	39	37	42 =	51	41	41 =
Ease of getting through to the right person (phone only)	65	65	68	67	66	72 =	N/A	61	63 =	71	77	75 =	68	66	78 *H*	66	61	59 *L*

Q4. How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied (prompted responses, single coded) *The data shown for EE in 2014 and 2015 included households that used either EE, Orange or T-Mobile - The equivalent for Measure 1 in 2012/ 2013 was 74%/ 65% for Orange and 71%/ 72% for T-Mobile. The equivalent for Measure 2 in 2012/ 2013 was 32%/ 41% for Orange and 37%/ 47% for T-Mobile. The equivalent for Measure 3 in 2012/ 2013 was 63%/ 56% for Orange and 62%/ 65% for T-Mobile.
Base: All UK households who contacted their mobile phone network provider/ who contacted by phone (In 2015 – 1600/ 1397 Total, 200/ 184 3/Three, 400/ 361 EE, 400/ 326 O_2, 200/ 188 Virgin Mobile, 400/ 338 Vodafone)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015
↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level
=/ *H*/ *L* Indicates that the provider's measure did not differ/ was higher/ was lower compared to the sector average in 2015

[54] The measure 'Ease of getting through to the right person' was asked of those who contacted customer services by phone

Satisfaction with speed of customer service

Most customers continued to be satisfied with the speed of customer services, with above average satisfaction among Virgin Mobile customers for both measures

Figure 55 shows the percentage of customers stating that they were satisfied (giving a rating of 7-10) with two specific measures relating to the speed of customer service[55]. Around six in ten customers who contacted their mobile phone network provider were satisfied with the speed of answering the phone (63%) and around seven in ten were satisfied with the time taken to handle the issue (67%).

Compared to the sector as a whole, Virgin Mobile customers were more likely to be satisfied with both the speed of answering the phone (76% vs. 63%) and the time taken to handle the issue (78% vs. 67%). O_2 customers were also more likely to be satisfied with the time taken to handle the issue (74% vs. 67% for the sector as a whole). No other significant differences were evident comparing individual providers with the sector average in 2015.

There have been no changes in the sector average or the average for any providers since 2014 for either measure.

Figure 55: Satisfaction with the speed of customer service: 2013-2015

% satisfied (giving a rating of 7-10)	Sector average			3/Three			*EE			O_2			Virgin Mobile			Vodafone		
	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015
Speed of answering phones (phone only)	64	62	63	71	61	70 =	N/A	61	59 =	68	67	66 =	64	65	76 *H*	68	57	56 =
The time taken to handle issue	67	67	67	70	63	74 =	N/A	63	61 =	71	76	74 *H*	69	70	78 *H*	69	64	62 =

Q4. How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied (prompted responses, single coded) *The data shown for EE in 2014 and 2015 included households that used either EE, Orange or T-Mobile - The equivalent for Measure 1 in 2012/ 2013 was 66%/ 53% for Orange and 61%/ 64% for T-Mobile. The equivalent for Measure 2 in 2012/ 2013 was 67%/ 60% for Orange and 63%/ 69% for T-Mobile
Base: All UK households who contacted their mobile phone network provider/ who contacted by phone (In 2015 – 1600/ 1397 Total, 200/ 184 3/Three, 400/ 361 EE, 400/ 326 O_2, 200/ 188 Virgin Mobile, 400/ 338 Vodafone)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015
↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level
=/ H/ L Indicates that the provider's measure did not differ/ was higher/ was lower compared to the sector average in 2015

[55] The measure 'Speed of answering the phone' was asked of those who contacted customer services by phone

Satisfaction with advice from customer service

Most customers continued to be satisfied with the standard of advice from customer service, with above average satisfaction among O_2 customers for each measure

Customers who contacted their mobile phone network provider in the three months prior to the interview (July to September 2015) were asked to rate their satisfaction with three aspects relating to the standard of advice from their mobile phone network provider (Figure 56).

Satisfaction with the standard of advice from the mobile phone network providers' customer service was consistent across each of its three constituent elements, as in previous years. Around two-thirds of customers were satisfied that the advice/ information was easy to understand (71%), useful (69%), and with getting the issue resolved to their satisfaction (68%). In 2015, O_2 customers were more likely to say they were satisfied compared to the sector overall, with all three aspects. This higher satisfaction regarding the standard of advice was also evident among O_2 customers in 2014.

No other significant differences between individual providers and the sector overall were evident in 2015.

There were no changes in the sector average or the average for any providers since 2014 for any of these measures.

Figure 56: Satisfaction with the standard of advice from customer service: 2013-2015

% satisfied (giving a rating of 7-10)	Sector average			3/Three			*EE			O_2			Virgin Mobile			Vodafone		
	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015
Advice/ information was easy to understand	70	68	71	70	68	70 =	N/A	64	65 =	74	77	80 *H*	69	70	79 =	71	65	65 =
Advice/ information was useful	70	67	69	74	66	69 =	N/A	61	65 =	76	76	78 *H*	66	72	77 =	71	62	62 =
Getting the issue resolved to your satisfaction	69	67	68	75	66	69 =	N/A	63	63 =	75	75	78 *H*	65	71	76 =	69	64	63 =

Q4. How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied (prompted responses, single coded) *The data shown for EE in 2014 and 2015 included households that used either EE, Orange or T-Mobile - The equivalent for Measure 1 in 2012/ 2013 was 71%/ 65% for Orange and 62%/ 68% for T-Mobile. The equivalent for Measure 2 from 2012/ 2013 was 67%/ 63% for Orange and 61%/ 65% for T-Mobile. The equivalent for Measure 3 from 2012/ 2013 was 66%/ 61% for Orange and 60%/ 66% for T-Mobile
Base: All UK households who contacted their mobile phone network provider/ who contacted by phone (In 2015 – 1600 Total, 200 3/Three, 400 EE, 400 O_2, 200 Virgin Mobile, 400 Vodafone)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015
↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level
=/ *H*/ *L* Indicates that the provider's measure did not differ/ was higher/ was lower compared to the sector average in 2015

Satisfaction with customer service advisor

Most customers continued to be satisfied with the customer service advisor, with higher than average satisfaction among O_2 customers for most aspects

Customers who contacted their mobile phone network provider in the three months prior to the interview were asked to rate their satisfaction with the customer service advisor for six individual measures, as shown in Figure 57. As in 2014, most customers of mobile phone network providers continued to be satisfied across each of the six measures relating to satisfaction with the customer service advisor.

In 2015, as was also the case in 2014, for the mobile phone sector overall, satisfaction was highest for courtesy and politeness of advisors (76%) and lowest for the advisor logging query details to avoid having to repeat yourself (62%). In 2015 compared to the sector average overall, O_2 customers were more satisfied with five of the six aspects of service from the customer service advisor: the courtesy and politeness of advisors (85% vs. 76%), the advisor's ability to understand the issue and identify the problem (76% vs. 69%), the advisor taking their question/ issue seriously (82% vs. 73%), keeping you informed throughout the process (75% vs. 68%) and their advisor doing what they said they would do (79% vs. 71%).

Two aspects relating to the customer service advisor attract lower satisfaction ratings compared to the mobile phone sector overall in 2015: EE customers were less likely to be satisfied with the courtesy and politeness of advisors (69% vs. 76%) and Vodafone customers were less likely to be satisfied with logging query details to avoid having to repeat yourself (54% vs. 62%).

No other differences between individual providers and the sector overall were evident in 2015. There were no changes in the sector average or the average for any providers since 2014 for any of these measures.

Figure 57: Satisfaction with the customer service advisor: 2013-2015

% satisfied (giving a rating of 7-10)	Sector average			3/Three			*EE			O_2			Virgin Mobile			Vodafone		
	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015
Courtesy and politeness of advisors	80	77	76	82	75	80 =	N/A	73	69 *L*	83	81	85 *H*	75	84	82 =	81	74	73 =
Advisor ability to understand the issue and identify the problem	71	69	69	71	69	72 =	N/A	64	63 =	75	77	76 *H*	67	73	75 =	71	68	67 =
Advisor took my questions/ issue seriously	76	74	73	76	73	76 =	N/A	69	66 =	80	79	82 *H*	71	79	80 =	76	73	71 =
Keeping you informed throughout the process	70	67	68	72	68	72 =	N/A	63	63 =	75	74	75 *H*	69	72	74 =	70	64	64 =
Advisor doing what they said they would do	72	71	71	72	71	73 =	N/A	67	66 =	79	78	79 *H*	67	75	77 =	72	66	66 =
Logging of query details to avoid having to repeat yourself	62	60	62	64	61	64 =	N/A	56	60 =	67	72	69 =	56	58	66 =	64	54	54 *L*

Q4. How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied (prompted responses, single coded) *The data shown for EE in 2014 and 2015 included households that used either EE, Orange or T-Mobile - The equivalent for Measure 1 in 2012/ 2013 was 77%/ 78% for Orange and 74%/ 80% for T-Mobile. The equivalent for Measure 2 in 2012/ 2013 was 69%/ 68% for Orange and 67%/ 69% for T-Mobile. The equivalent for Measure 3 in 2012/ 2013 was 72%/ 73% for Orange and 70%/ 73% for T-Mobile. The equivalent for Measure 4 in 2012/ 2013 was 64%/ 63% for Orange and 64%/ 70% for T-Mobile. The equivalent for Measure 5 in 2012/ 2013 was 67%/ 65% for Orange and 68%/ 69% for T-Mobile. The equivalent for Measure 6 in 2012/ 2013 was 55%/ 56% for Orange and 55%/ 62% for T-Mobile.

Base: All UK households who contacted their mobile phone network provider/ who contacted by phone (In 2015 – 1600 Total, 200 3/Three, 400 EE, 400 O_2, 200 Virgin Mobile, 400 Vodafone)

Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015

↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level

=/ H/ L Indicates that the provider's measure did not differ/ was higher/ was lower compared to the sector average in 2015

Satisfaction with other aspects of customer service

Most customers continued to be satisfied with their provider's willingness to help resolve the issue and more are satisfied with their provider in relation to offering compensation or a goodwill payment compared with 2014

Figure 58 shows the percentage of satisfied customers for more general customer service attributes. While seven in ten customers who contacted their mobile phone network provider were satisfied with the willingness to help resolve the issue (70%), fewer than half were satisfied with the provider in relation to offering compensation or a goodwill payment (41%). The proportion who were satisfied with this latter measure has, however, increased from 2014 (from 35% to 41%).

Two differences between individual providers and the sector overall were evident in 2015. Virgin Mobile customers were less likely to be satisfied with the provider in relation to offering compensation or a goodwill payment (31% vs. 41% overall) while O_2 customers were more satisfied with the provider's willingness to help resolve the issue (79% vs. 70% overall)

There were no other changes in the sector average and no changes in levels of satisfaction for any provider from 2014 for either of these measures.

Figure 58: Satisfaction with other aspects of customer service: 2013-2015

% satisfied (giving a rating of 7-10)	Sector average			3/Three			*EE			O_2			Virgin Mobile			Vodafone		
	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015
Offering compensation or a goodwill payment	37	35	41↑	40	40	51 =	N/A	34	40 =	40	38	43 =	27	32	31 *L*	40	33	38 =
Willingness to help resolve your issue	72	69	70	74	68	72 =	N/A	65	64 =	77	73	79 *H*	65	75	73 =	72	68	67 =

Q4. How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied (prompted responses, single coded) *The data shown for EE in 2014 and 2015 included households that used either EE, Orange or T-Mobile - The equivalent for Measure 1 in 2012/ 2013 was 25%/ 34% for Orange and 27%/ 37% for T-Mobile. The equivalent for Measure 2 in 2012/ 2013 are 67%/ 68% for Orange and 65%/ 68% for T-Mobile.
Base: All UK households who contacted their mobile phone network provider/ who contacted by phone (In 2015 – 1600 Total, 200 3/Three, 400 EE, 400 O_2, 200 Virgin Mobile, 400 Vodafone)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015

↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level

=/ *H*/ *L* Indicates that the provider's measure did not differ/ was higher/ was lower compared to the sector average in 2015

Future use of provider based on experience

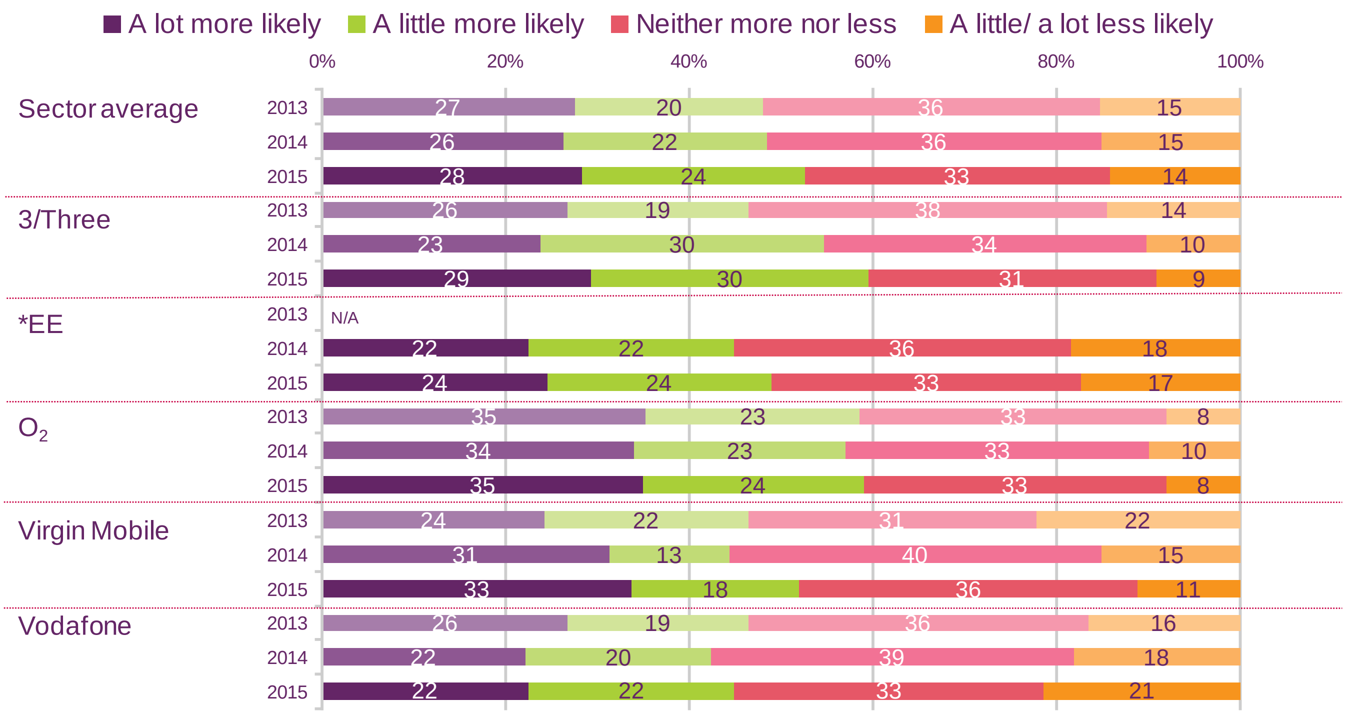
Around half of mobile customers say they were more likely to use their mobile phone network provider as a result of their recent customer service experience - as in 2014

Customers who contacted their mobile phone network provider were asked whether their most recent customer service experience had made them more or less likely to use their provider in the future. Results are shown at an overall level and by provider for 2013, 2014 and 2015 in Figure 59. Around half of mobile customers (52%) who had contacted their provider in the previous three months said that their experience had made them more likely to use their provider in the future. Around three in ten said they were now ‘a lot more likely’ to use their mobile phone network provider again (28%), with fewer saying they were now ‘a little or a lot less likely’ (14%).

In 2015, compared to the sector overall no particular network provider’s customers stood out in terms being more likely to use their provider in future. However, Vodafone customers were less likely to say they were now ‘a little/ lot more likely’ to use their provider in future (44% vs. 52%).

Compared to 2014, there was no change in the likelihood of future use both for the sector as a whole and for each of the providers.

Figure 59: Future use of provider given customer service experience - mobile phone: 2013-2015



Q7. Has your experience of [PROVIDER]’s customer service for this issue made you more or less likely to use [PROVIDER] in the future? (prompted responses, single coded) *The data shown for EE in 2014 and 2015 included households that used either EE, Orange or T-Mobile - The equivalent measures from 2013 were 21%/ 21% for Orange and 24%/ 16% for T-Mobile.
Base: All UK households who contacted their mobile phone network (In 2015 – 1600 Total, 200 3/Three, 400 EE, 400 O_2, 200 Virgin Mobile, 400 Vodafone)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015.

↑↓ Indicates significantly higher/ lower ‘A lot more likely’ or ‘less likely’ compared to 2014 at the 99% confidence level.

Section 7

Pay TV sector

This section looks in detail at the pay TV sector. It shows, where possible, how each provider included (Sky and Virgin Media) performed against key measures such as:

- incidence of contact about pay TV
- incidence of complaints
- issue type
- whether the issue was completely resolved
- time taken to resolve the issue
- satisfaction with customer service
- future use based on customer service experience

For each measure this section shows how the provider performed in 2015 against the overall pay TV sector average. This section also shows, where possible, how the sector average and the provider-specific measures in 2015 compared to those in 2014. The longer term trend is also reported, where appropriate. Inclusion in this research did not necessarily mean a high level of complaints.

Where we report a provider's position as in line with the sector average, we mean there is no statistically significant difference between that average and that provider. There may, nonetheless, be statistically significant differences between providers whose positions are reported as each in line with the sector average.

As detailed earlier, some providers included at Stage 1 of the study were not included at the Stage 2 online interviewing, because fewer than 35 interviews were conducted with customers who had been in contact with that provider in the previous 3 months. For pay TV this means that results for BT TV and TalkTalk TV were not included at Stage 2 and have not been shown in this reporting.

As stated earlier, non-inclusion at Stage 2 did not necessarily mean low levels of complaints, but may also have meant low levels of general enquiries, resulting in contact volumes that were too low for inclusion. By the same token, inclusion in this research did not necessarily mean a high level of complaints.

From 2011 to 2012, the pay TV sector average included only Sky and Virgin Media. BT TV was included in the 2013 reporting, through meeting the minimum threshold. It is therefore worth noting that where any comparison is made with the 2013 average sector scores for pay TV, BT TV was included for 2013 and was excluded for both 2014 and 2015.

References in this section of the report relating to all pay TV providers or any pay TV providers relate to those pay TV providers included in this study; that is Sky and Virgin Media in 2015. These same providers were included in the 2014 study.

Recent contact with provider

Around one in five customers contacted their pay TV provider in the three months prior to the interview, a decrease from 2014

Figure 60 shows the proportion of customers that had made contact (by telephone, email, webchat or letter)[56], in the three months prior to the interview[57], with either of the two pay TV providers included in this report. This contact was either regarding a specific issue relating to their pay TV or a more general issue that applied to all the services they may take with that provider[58].

In 2015, around one in five (17%) of all UK households who used one of the two pay TV providers included in this report had contacted their provider in the three months prior to the interview. This incidence is lower compared to 2014 (from 22%), with this decrease evident for Virgin Media customers (15% in 2015 vs. 23% in 2014).

The overall measure of contact did not differ by provider compared to the sector average[59].

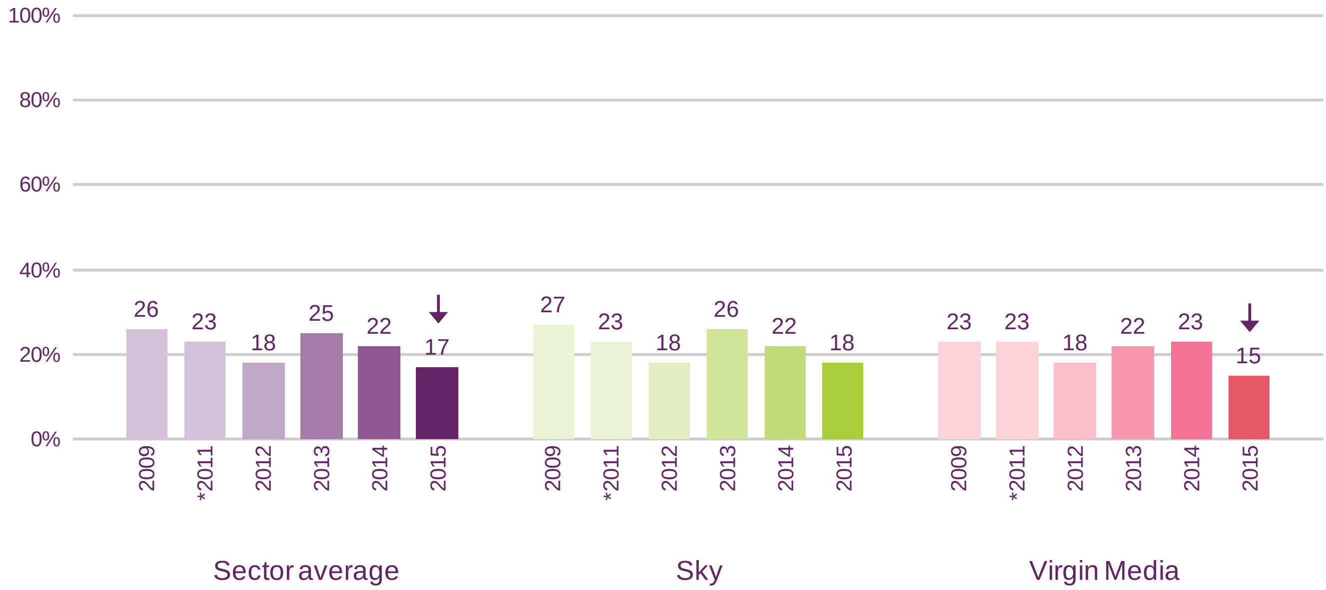
[56] Prior to 2014 respondents were only asked about contact by telephone or email, with contact by webchat or letter added in 2014, so data from previous years is not directly comparable

[57] With the data for this measure coming from the omnibus study this meant that contact was between May and October 2015

[58] So for example, if a customer has their pay TV and broadband service provided by Virgin Media and they did not say their most recent contact was regarding the pay TV service specifically, then they were asked whether it was a general issue that applies to both their pay TV and broadband service

[59] This is indicated by the '=' symbols appearing for each provider in the box below the chart within Figure 60. This convention is included across several of the Figures in this and subsequent sections. If in 2015, for a given measure a provider performed better than the sector average the box below the chart will show *'HIGHER'* for that particular provider and if a provider performs worse then it will show *'LOWER'*

Figure 60: Proportion of customers who contacted their pay TV provider in the three months prior to the interview: 2009, 2011, 2012, 2013, 2014 and 2015



PROVIDER LEVEL VS. 2015 SECTOR AVERAGE	=	=

Q6. Thinking of [PROVIDER] and the services you buy from them, have you contacted them in the last 3 months by telephone, email, webchat or letter? (spontaneous responses, single coded) NB – Prior to 2014 respondents were only asked about contact by telephone or email, with contact by webchat or letter added in 2014 so the data was not directly comparable *In 2011, two waves of research were conducted and the data shown relates to Q3
Base: All UK households who used Pay TV providers (In 2015 – 1827 Total, 1258 Sky, 569 Virgin Media)
Source: Ofcom research, omnibus survey, fieldwork carried out by Saville Rossiter-Base in August, September and November 2015.

↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level

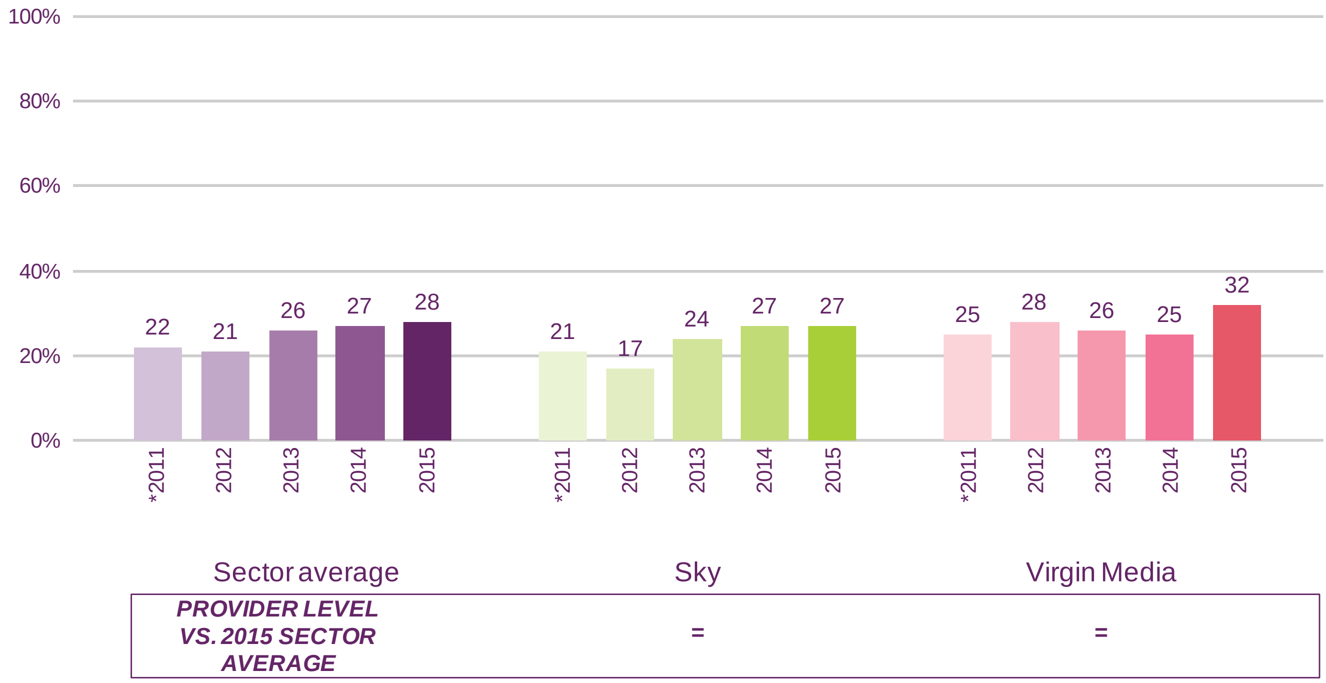
Proportion of complaints

Around three in ten contacts with pay TV providers were considered to be complaints in 2015

Since the 2011[60] surveys, those customers that had contacted their pay TV provider (in the previous three months[61]) were asked whether they considered the reason for this contact to be a complaint[62]. Figure 61 shows that overall around three in ten contacts (28%) were considered to be complaints. This overall incidence did not vary by provider in 2015 and was unchanged from 2014.

Any change in the levels of satisfaction since 2014 among pay TV customers at an overall level or among customers of any particular provider cannot be said to be due to an increase or decrease in the incidence of complaints.

Figure 61: Proportion of recent contacts with pay TV providers considered by the customer to be a complaint: 2011-2015



Q5a. And in your opinion, was the reason for this contact with [PROVIDER] a complaint, or something else? (prompted responses, single coded) *In 2011, two waves of research were conducted and the data shown relates to Q3
Base: All UK households who contacted their Pay TV provider (In 2015 – 1000 Total, 500 Sky, 500 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015.
↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level

[60] The question to establish whether the reason for contact was considered to be a complaint was only included in the study since 2011, hence no data is shown for 2009
[61] With the data for this measure coming from the online study this meant that the contact was between July and September 2015
[62] Respondents were not prompted with a definition of a complaint, this was therefore self-defined by the respondent

Most recent contact by issue type

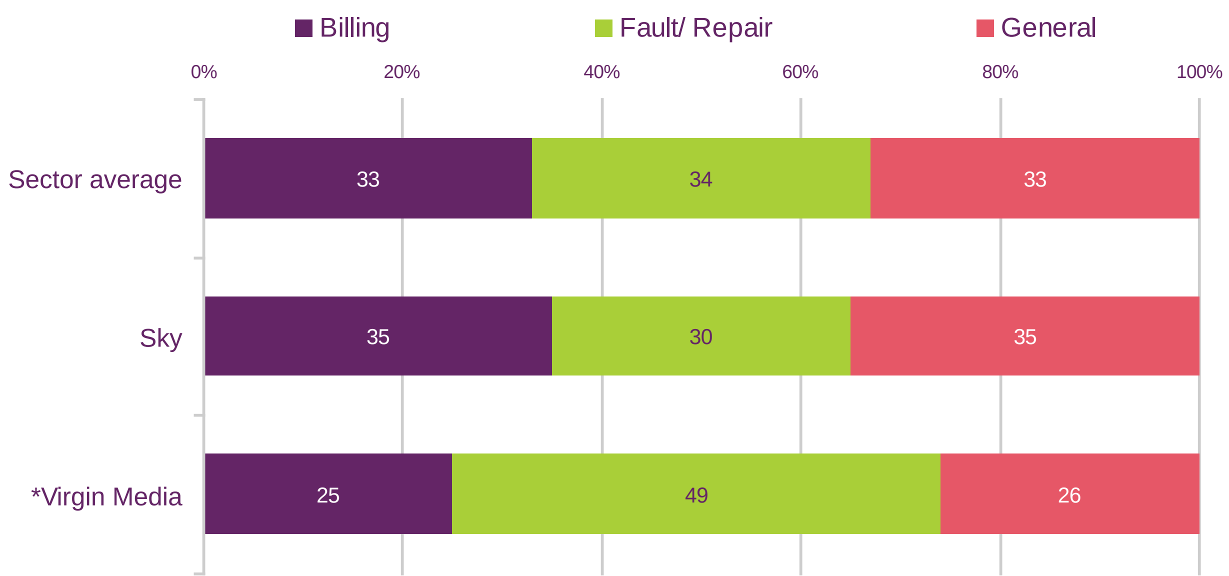
There was no change from 2014 in the type of issue that customers were contacting their pay TV provider about

Customers were prompted with a list of seven possible reasons for contacting their pay TV provider and asked to say which one reason applied to their most recent contact. These seven possible responses were then grouped into three distinct categories: a billing issue, a fault or repair issue or a general enquiry.

Figure 62 shows the incidence of the three types of issue in 2015. In the pay TV sector overall there were broadly equal levels of contact regarding billing (33%), fault/ repair (34%) and general enquiries (33%). The incidences of the three types of issue did not vary significantly for either of the pay TV providers compared to the overall sector average[63].

There was no change from 2014 in the type of issue that pay TV providers were contacted about.

Figure 62: Type of issue for most recent contact with pay TV provider: 2015



Q8. Thinking of the most recent issue you had to contact [PROVIDER] about, which one of the following categories did the issue fall into? Was it to do with..... ? (prompted responses, single coded) *Caution: Base below 100
Base: All UK households who contacted their Pay TV provider (In 2015 – 307 Total, 218 Sky, 89 Virgin Media)
Source: Ofcom research, omnibus survey, fieldwork carried out by Saville Rossiter-Base in August and September 2015.
↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level

[63] The number of interviews conducted on the omnibus study among Virgin Media pay TV customers who made contact with their provider was below 100 interviews and should therefore be treated with caution

Key issues by contact type

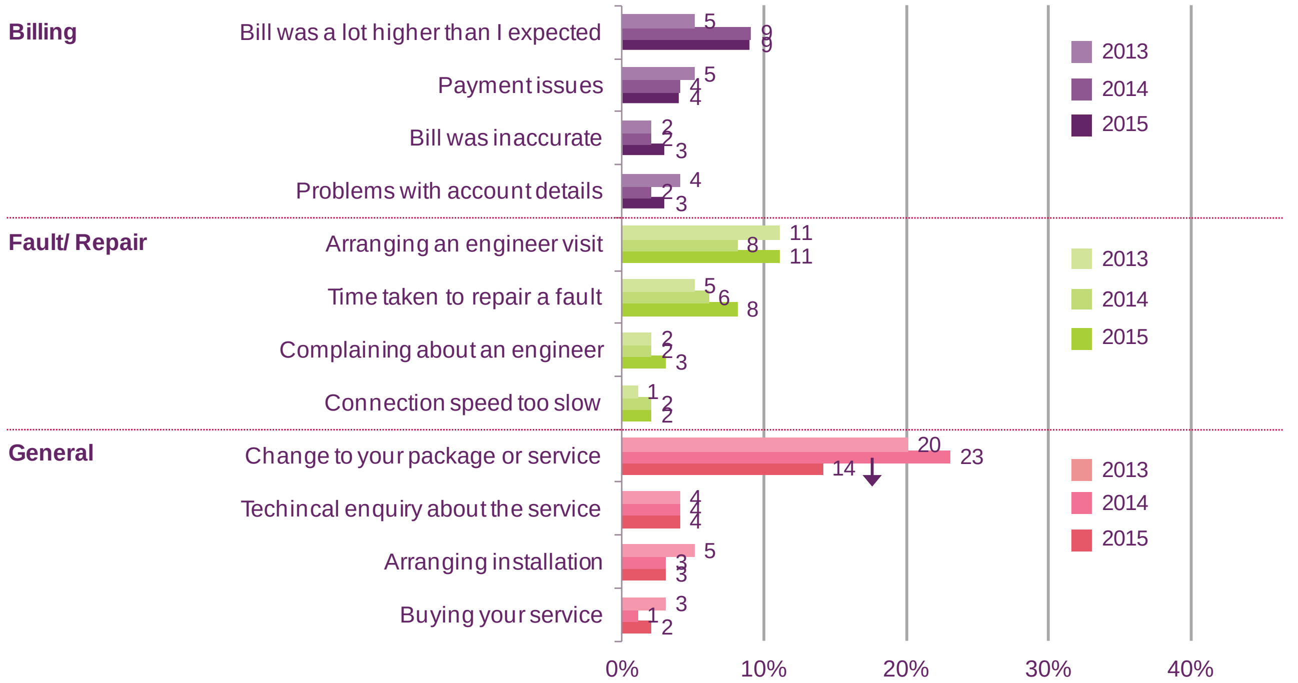
The most common reason for contacting the pay TV provider was to make a change to the package or service

Figure 63 shows the top four reasons for recent contact with service providers, by each issue type[64]. No single reason accounted for the majority of contacts from pay TV customers to their provider in 2015, as in 2014 and in 2013.

The most common reason for contacting their provider was to make a change to their package or service (14%) in terms of upgrading or downgrading it. Around one in ten made contact to arrange an engineer visit (11%), because a bill was higher than expected (9%) or to report the time taken to repair a fault (8%).

In 2015, contact to make a change to their package or service was less likely than in 2014 (14% vs. 23% in 2014). Otherwise reasons for the recent contact had not significantly changed from 2014.

Figure 63: Pay TV – Top 4 issues per contact type: 2013-2015



S7a-c. And more specifically, which of the following best describes what the issue with [PROVIDER] was concerning? (prompted responses, single coded)
Base: All UK households who contacted their Pay TV provider (In 2013 – 1103 Total, In 2014 – 1000 Total, In 2015 – 1000 Total)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015.

↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level

64 Respondents were shown a different list of reasons to choose from dependent on whether they said their most recent contact was regarding a billing, fault and repair or general issue. To enable a comparison the data in Figure 63 is expressed as a proportion of all those that had contacted their pay TV provider in the last 3 months (July to September 2015).

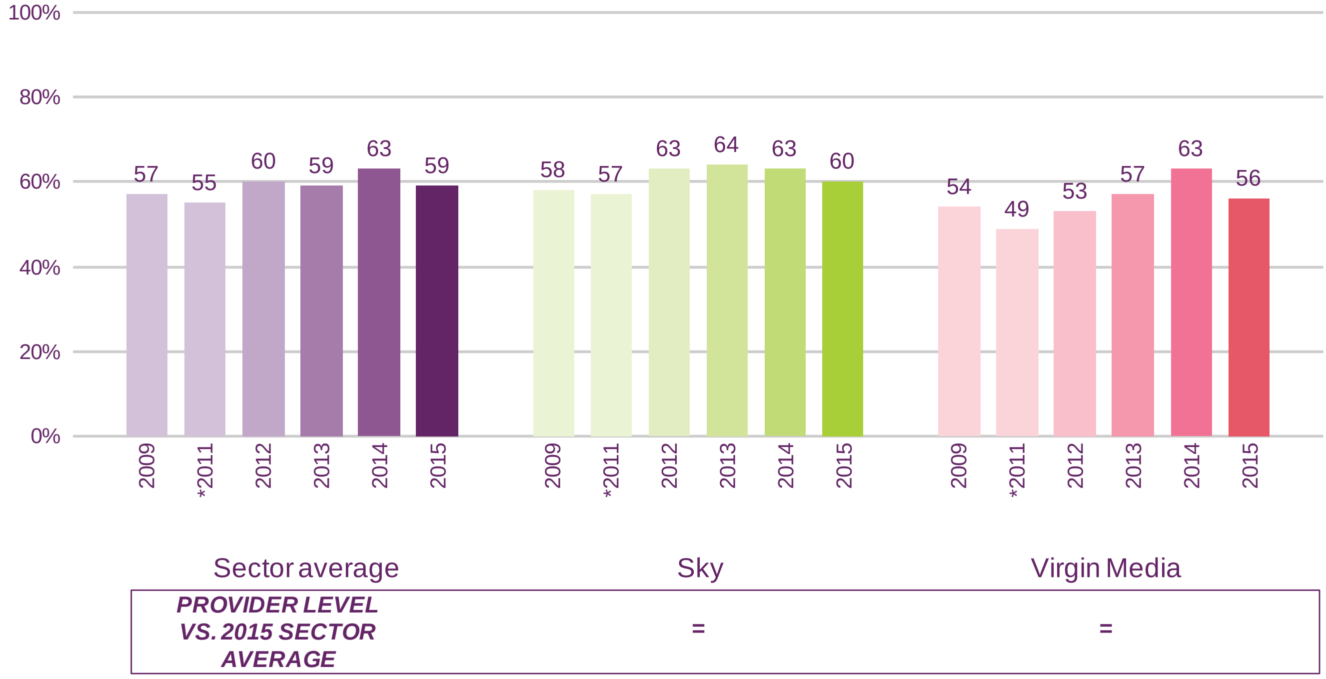
Number of contacts

Around six in ten customers who contacted their pay TV provider only required one contact, unchanged from 2014

Customers were asked how many times they had been in contact, so far, with their pay TV provider about their most recent issue. Figure 64 shows the proportion that had only been in contact once with their pay TV provider, at an overall sector level and by provider (between 2009 and 2015).

Overall, around six in ten (59%) customers who contacted pay TV providers only made contact on one occasion, and this measure was unchanged from 2014. This overall measure did not vary in 2015 for either of the pay TV providers compared to the sector average.

Figure 64: Proportion in contact one time with the provider – pay TV: 2009, 2011, 2012, 2013, 2014 and 2015



Q6. How many times have you been in contact with [PROVIDER] in relation to this particular issue so far? (prompted responses, single coded) *In 2011, two waves of research were conducted and the data shown relates to Q3
Base: All UK households who contacted their Pay TV provider (In 2015 – 1000 Total, 500 Sky, 500 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015.
Indicates significant increase/ decrease compared to 2014 at the 99% confidence level

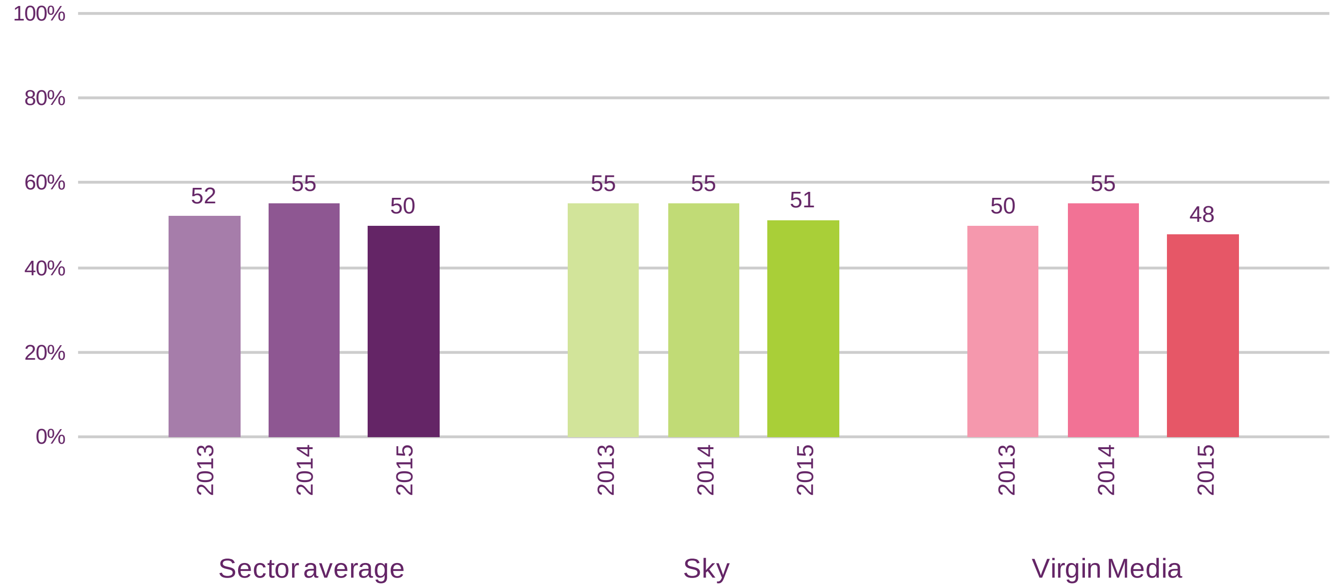
Issue resolution

Half of those recently contacting their pay TV provider said their issue had been completely resolved in one contact – unchanged from 2014

Those that had contacted their pay TV provider in the three months prior to interview (July to September 2015) were asked the extent to which they felt the issue they had contacted their provider about had been resolved. Respondents were given the choice of whether the issue had been fully resolved, partially resolved or if it was still unresolved (as defined by the respondent). Figure 65 shows the proportions in 2013, 2014 and 2015 who considered their issue completely resolved[65] in one contact[66].

As shown in Figure 65, in 2015 half of customers (50%) contacting their pay TV provider considered their issue completely resolved in the first contact. This was the case for both Sky (51%) and Virgin Media (48%). There was no significant change in these incidences for the sector overall or for Sky or Virgin Media, compared to 2014.

Figure 65: Proportion whose issue was completely resolved in one contact – pay TV: 2013-2015



PROVIDER LEVEL VS. 2015 SECTOR AVERAGE	=	=

Q6. How many times have you been in contact with [PROVIDER] in relation to this particular issue so far? (prompted responses, single coded)
Base: All UK households who contacted their Pay TV provider (In 2015 – 1000 Total, 500 Sky, 500 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015.
↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level

[65] It was decided since 2013 to report on complete resolution as issues that were 'partly' resolved may go on to be completely resolved or may remain only partly resolved
[66] Since 2014 it was decided to report on those who had their issue resolved in one contact (as opposed to those who felt their issue was resolved across several contacts) as this would not be influenced by the date of their initial contact (which could have been anytime between July and September 2015)

More than half of pay TV customers contacting their provider with a general enquiry and half contacting with a billing issue had this issue resolved in one contact

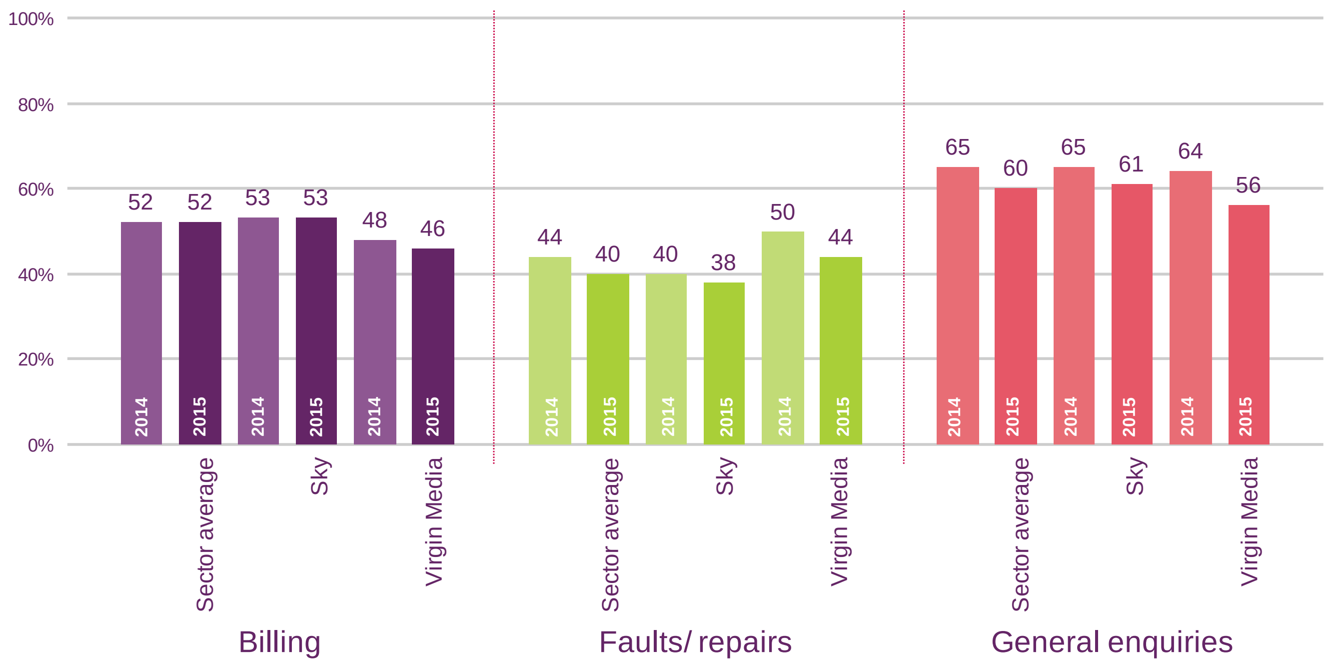
Figure 66 shows the proportion who contacted their pay TV provider in the three months prior to the interview with a billing or fault/ repair or a general enquiry issue and considered this issue completely resolved in one contact, in 2014 and 2015.

In 2015, around three in five customers who contacted their pay TV provider (either Sky or Virgin Media) with a general enquiry issue (60%) felt their issue had been completely resolved in one contact. As in previous years, resolution in one contact was more likely for a general enquiry issue than for either a billing issue (52%) or for a fault/ repair issue (40%). In 2015, as in 2014, neither Sky nor Virgin Media performed significantly better or worse than the pay TV sector average for any of the three issue types.

Compared to 2014, there was no change in the proportion of customers who felt that their issue was completely resolved in one contact, at an overall sector level or by individual provider.

While not shown in Figure 67, those that contacted their Pay TV provider with a complaint were less likely to feel that their issue was completely resolved in one contact (38%) compared to those whose issue was not considered a complaint (55%).

Figure 66: Pay TV - Whether the issue that the customer contacted their provider about was considered to be completely resolved in one contact, by provider: 2014 and 2015



Q5. In your opinion, was [PROVIDER] able to successfully resolve your issue [BILLING/ FAULT/ GENERAL ENQUIRY]? (spontaneous responses, single coded)
Base: All UK households who contacted their Pay TV provider about each type of issue (In 2015 – For billing 362 Total, 207 Sky, 155 Virgin Media, for faults/ repairs 346 Total, 145 Sky, 201 Virgin Media, for general enquiries 292 Total, 148 Sky, 144 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015.

↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level.

Time taken to resolve

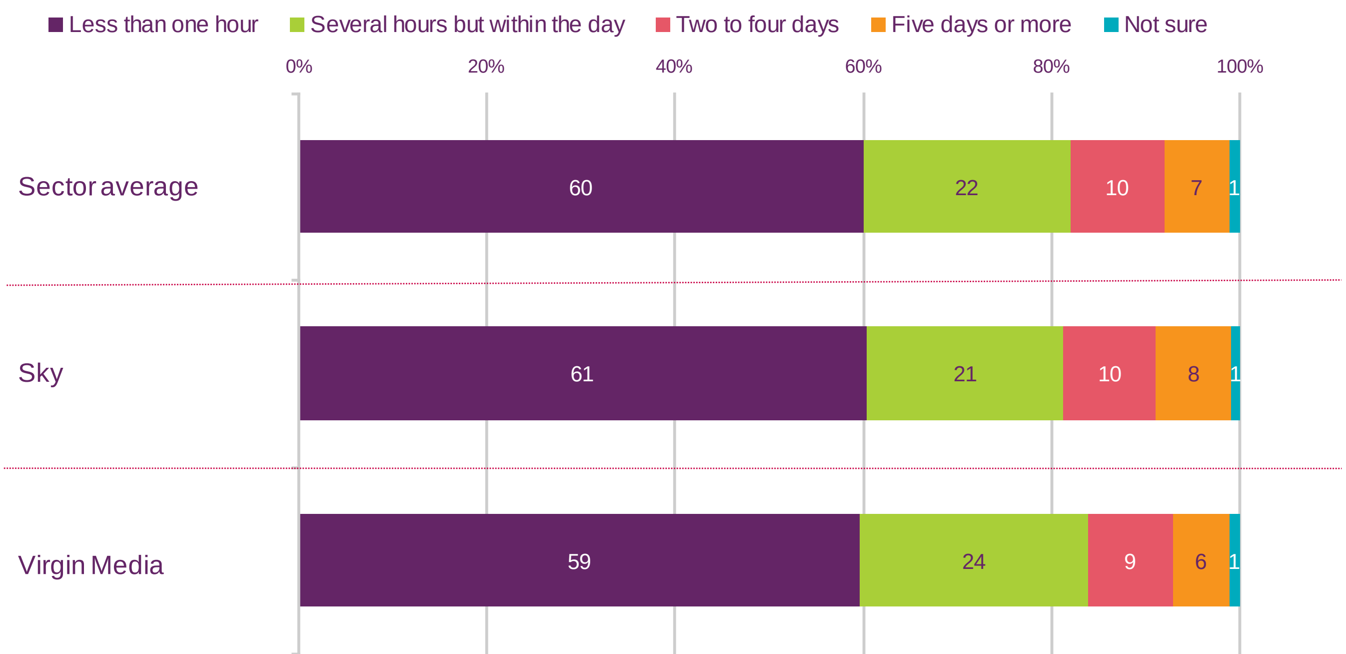
Six in ten customers who contacted their pay TV provider said their issues had been completely resolved in less than one hour

Customers who considered their issue to be completely resolved were asked how long it had taken to resolve the issue with their provider. Figure 67 shows the percentage of customers saying that issue resolution, issue closure or the time to date had taken less than one hour, several hours but within one day, from two to four days, or five days or more.

The majority of those who made contact with their pay TV provider said that the time taken was less than one hour (60%), with around four in five (82%) saying the issue was completely resolved within the day. Resolution within the hour or within the day did not vary for either of the providers shown compared to the sector average.

Fewer than one in ten said the issue took five days or more to be completely resolved (7%) and this incidence also did not vary by provider.

Figure 67: Time taken to resolve the issue – pay TV: 2015



Q10. How long did it take to resolve the issue with [PROVIDER]? (prompted responses, single coded)
Base: All UK households who contacted their Pay TV provider whose issue was completely resolved (In 2015 – 711 Total, 365 Sky, 346 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015.
↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level.

Overall satisfaction with provider and with customer service received

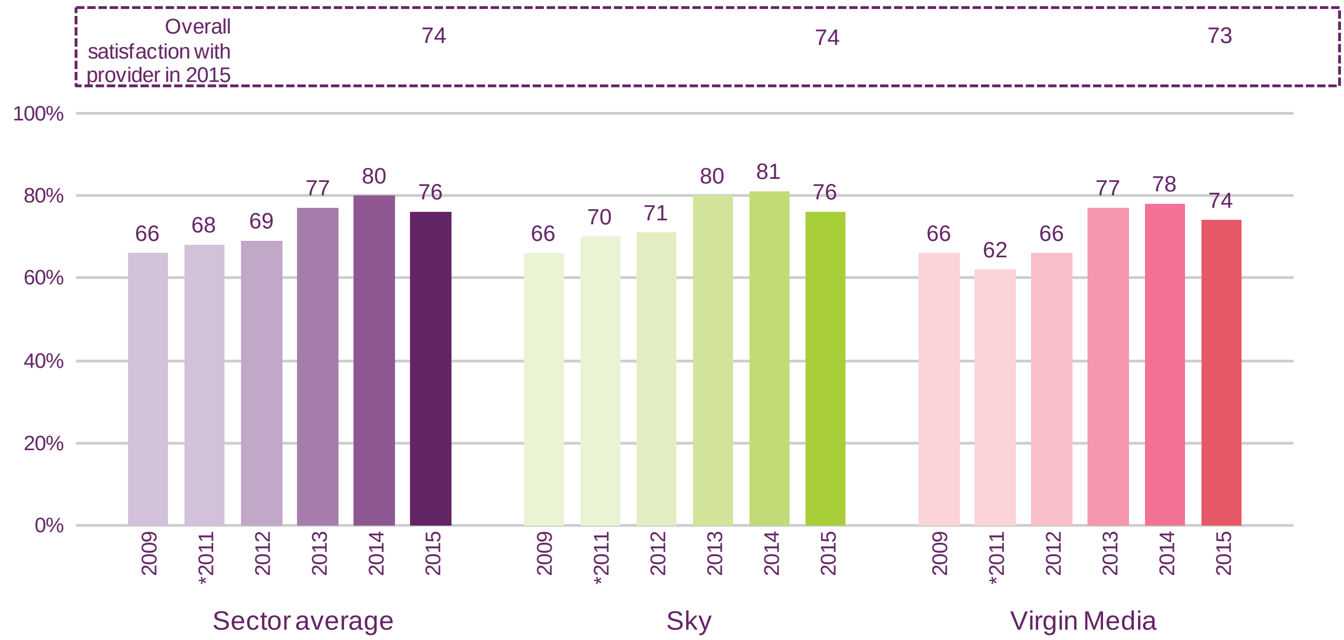
Three in four pay TV customers were satisfied with the customer service received

Satisfaction with the customer service provided by the pay TV provider among those who recently made contact, as shown in Figure 68, was at a comparable level to overall satisfaction with the provider, for the sector overall and for each provider. Overall satisfaction with the provider is shown at the top of Figure 68.

In 2015, three in four customers (76%) who contacted their pay TV provider were satisfied with the customer service received. This level has not significantly changed from 2014, and there was also no change in satisfaction from 2014 for either of the pay TV providers and satisfaction did not vary for either provider compared to the sector average in 2015.

Overall satisfaction with the provider has not changed from 2014 at an overall level (74%) or among Sky customers (74%), but has decreased for Virgin Media customers (73% vs. 80% in 2014). As already stated, there was no change in satisfaction with the customer service received for either pay TV provider since 2014.

Figure 68: Satisfaction with customer service from provider – pay TV: 2009, 2011, 2012, 2013, 2014 and 2015



PROVIDER LEVEL VS. 2015 SECTOR AVERAGE	=	=

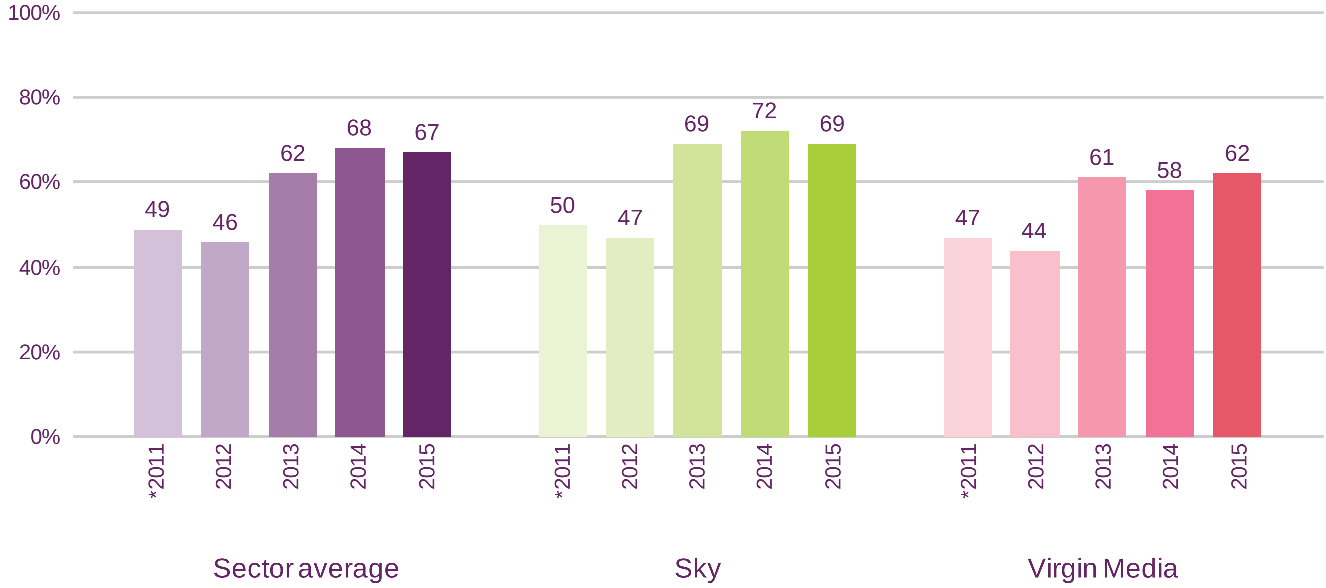
Q3. Overall how satisfied are you with the service you received from [PROVIDER] customer services on this occasion? (prompted responses, single coded) *In 2011, two waves of research were conducted and the data shown relates to Q3
Base: All UK households who contacted their Pay TV provider (In 2015 – 1000 Total, 500 Sky, 500 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015.

↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level

Figure 69 shows overall satisfaction with customer service among those customers who contacted their pay TV provider with a complaint. Around seven in ten (67%) of those who contacted their pay TV provider with a complaint were satisfied with the customer service received and this average for the sector did not vary by provider. Satisfaction with the service received among those making contact with a complaint was therefore significantly lower (at 67%) than satisfaction among all customers making contact (at 76%).

As with satisfaction among all customers (shown in Figure 68), satisfaction among those who contacted their provider with a complaint did not significantly change in 2015, either overall or for each provider.

Figure 69: Satisfaction with customer service from provider – pay TV complaints: 2011-2015



PROVIDER LEVEL VS. 2015 SECTOR AVERAGE	=	=

Q3. Overall how satisfied are you with the service you received from [PROVIDER] customer services on this occasion? (prompted responses, single coded) *In 2011, two waves of research were conducted and the data shown relates to Q3
Base: All UK households who contacted their Pay TV provider with a complaint (In 2015 – 291 Total, 140 Sky, 151 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015.

↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level

Satisfaction with contacting customer service

Levels of satisfaction with contacting customer service were unchanged from 2014

Customers who had contacted their pay TV provider (either by phone, email, webchat or letter) were asked to rate their satisfaction with various aspects of their provider's customer services on a 10 point scale; where 10 is extremely satisfied and 1 is extremely dissatisfied.

Figure 70 shows the percentage of customers stating that they were satisfied (giving a rating of 7-10) for three measures relating to contacting customer services[67].

In 2015, among those who contacted their pay TV provider, satisfaction was highest for ease of finding provider contact details (74%) and for the ease of getting through to the right person (72%), and lowest for calling back when they said they would (47%).

None of the measures had changed from 2014 at a sector average or individual provider level. As shown in Figure 70, one result varied significantly by individual provider compared to the sector average: Virgin Media customers were less likely than the sector average to say they were satisfied with the provider calling back when they said they would (39% vs. 47%). This difference was not evident in 2014.

Figure 70: Satisfaction with contacting customer service: 2013-2015

% satisfied (giving a rating of 7-10)	Sector average			Sky			Virgin Media		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
Ease of finding provider contact details	74	76	74	74	74	72 =	79	81	76 =
Calling you back when they said they would	46	46	47	47	48	50 =	43	42	39 *L*
Ease of getting through to the right person (phone only)	71	71	72	74	73	74 =	70	69	66 =

Q4. How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied (prompted responses, single coded)
Base: All UK households who contacted their Pay TV provider/ who contacted by phone (In 2015 – 1000/ 915 Total, 500/ 451 Sky, 500/ 464 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015
↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level
=/ H/ L Indicates that the provider's measure did not differ/ was higher/ was lower compared to the sector average in 2015

[67] The measure 'Ease of getting through to the right person' was asked of those who contacted customer services by phone.

Satisfaction with speed of customer service

Around seven in ten customers continued to be satisfied with the speed of customer services

Figure 71 shows the percentage of customers stating that they were satisfied (giving a rating of 7-10) with two specific measures relating to the speed of customer service[68].

The majority of customers who contacted their pay TV provider were satisfied with both the speed of answering the phone (68%) and the time taken to handle the issue (70%). Results did not vary by individual provider compared to the sector averages for these aspects and neither of the measures changed from 2014 to 2015.

Figure 71: Satisfaction with the speed of customer service: 2013-2015

% satisfied (giving a rating of 7-10)	Sector average			Sky			Virgin Media		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
Speed of answering phones (phone only)	66	69	68	67	70	70 =	69	65	64 =
The time taken to handle issue	72	73	70	74	74	71 =	74	71	68 =

Q4. How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied (prompted responses, single coded)
Base: All UK households who contacted their Pay TV provider/ who contacted by phone (In 2015 – 1000/ 915 Total, 500/ 451 Sky, 500/ 464 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015
↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level
=/ H/ L Indicates that the provider's measure did not differ/ was higher/ was lower compared to the sector average in 2015

68 The measure 'Speed of answering the phone' was asked of those who contacted customer services by phone.

Satisfaction with advice from customer service

Most customers continued to be satisfied with the standard of advice from customer service

Customers who contacted their pay TV provider in the three months prior to the interview (July to September 2015) were asked to rate their satisfaction with three aspects relating to the standard of advice from their pay TV provider, as shown in Figure 72.

Satisfaction with the standard of advice from the pay TV providers' customer service was consistent across each of its three constituent elements. At least seven in ten customers were satisfied that the advice/ information was easy to understand (72%), useful (70%), and with getting the issue resolved to their satisfaction (72%).

Results did not vary significantly by individual provider compared to the sector averages for these aspects of the standard of advice from customer service and none of the measures had changed from 2014.

Figure 72: Satisfaction with the standard of advice from customer service: 2013-2015

% satisfied (giving a rating of 7-10)	Sector average			Sky			Virgin Media		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
Advice/ information was easy to understand	75	77	72	77	79	73 =	75	73	70 =
Advice/ information was useful	72	73	70	75	75	71 =	71	69	68 =
Getting the issue resolved to your satisfaction	74	76	72	76	77	73 =	75	73	70 =

Q4. How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied (prompted responses, single coded)
Base: All UK households who contacted their Pay TV provider (In 2015 – 1000 Total, 500 Sky, 500 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015
↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level
=/ H/ L Indicates that the provider's measure did not differ/ was higher/ was lower compared to the sector average in 2015

Satisfaction with customer service advisor

At least two in three pay TV customers were satisfied with the service provided by the customer service advisor

Customers who contacted their pay TV provider in the three months prior to the interview were asked to rate their satisfaction with the customer service advisor for six individual measures. These measures are shown in Figure 73. As in 2014, most customers who had been in contact with their pay TV provider continued to be satisfied across each of the six measures relating to satisfaction with the customer service advisor.

In 2015, as was also the case in 2014, for the pay TV sector overall satisfaction was highest for courtesy and politeness of advisors (80%), and lowest for the advisor logging query details to avoid having to repeat yourself (66%). No differences between the individual pay TV providers and the sector overall were evident in 2015 and there were no changes in the sector average or in the levels of satisfaction for any provider from 2014 for any of these measures.

Figure 73: Satisfaction with the customer service advisor: 2013-2015

% satisfied (giving a rating of 7-10)	Sector average			Sky			Virgin Media		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
Courtesy and politeness of advisors	82	83	80	84	84	81 =	82	81	79 =
Advisor ability to understand the issue and identify the problem	76	76	76	79	77	77 =	74	74	74 =
Advisor took my questions/ issue seriously	80	79	78	82	79	79 =	79	79	73 =
Keeping you informed throughout the process	75	76	74	78	77	75 =	73	72	69 =
Advisor doing what they said they would do	77	78	74	80	79	75 =	78	78	71 =
Logging of query details to avoid having to repeat yourself	69	67	66	72	69	68 =	69	62	59 =

Q4. How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied (prompted responses, single coded)
Base: All UK households who contacted their Pay TV provider (In 2015 – 1000 Total, 500 Sky, 500 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015

↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level

=/ H/ L Indicates that the provider's measure did not differ/ was higher/ was lower compared to the sector average in 2015

Satisfaction with other aspects of customer service

Most customers continued to be satisfied with their provider's willingness to help resolve the issue

Figure 74 shows the percentage of satisfied customers for more general customer service attributes. While three-quarters of customers who contacted their pay TV provider were satisfied with the willingness to help resolve the issue (73%), fewer than half were satisfied with the provider in relation to offering compensation or a goodwill payment (45%).

Neither of the measures had changed from 2014 at a sector average or individual provider level. As shown in Figure 74, one result varied significantly by individual provider compared to the sector average: Virgin Media customers were less likely than the sector average to say they were satisfied with the provider in relation to offering compensation or a goodwill payment (35% vs. 45%). This difference was not evident in 2014.

Figure 74: Satisfaction with other aspects of customer service: 2013-2015

% satisfied (giving a rating of 7-10)	Sector average			Sky			Virgin Media		
	2013	2014	2015	2013	2014	2015	2013	2014	2015
Offering compensation or a goodwill payment	38	41	45	38	43	49 =	39	34	35 *L*
Willingness to help resolve your issue	74	75	73	75	76	74 =	75	74	71 =

Q4. How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied (prompted responses, single coded)
Base: All UK households who contacted their Pay TV provider (In 2015 – 1000 Total, 500 Sky, 500 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015

↑↓ Indicates significant increase/ decrease compared to 2014 at the 99% confidence level

=/ H/ L Indicates that the provider's measure did not differ/ was higher/ was lower compared to the sector average in 2015

Future use of provider based on experience

Around half of pay TV customers said they were more likely to use their provider in the future as a result of their recent customer service experience

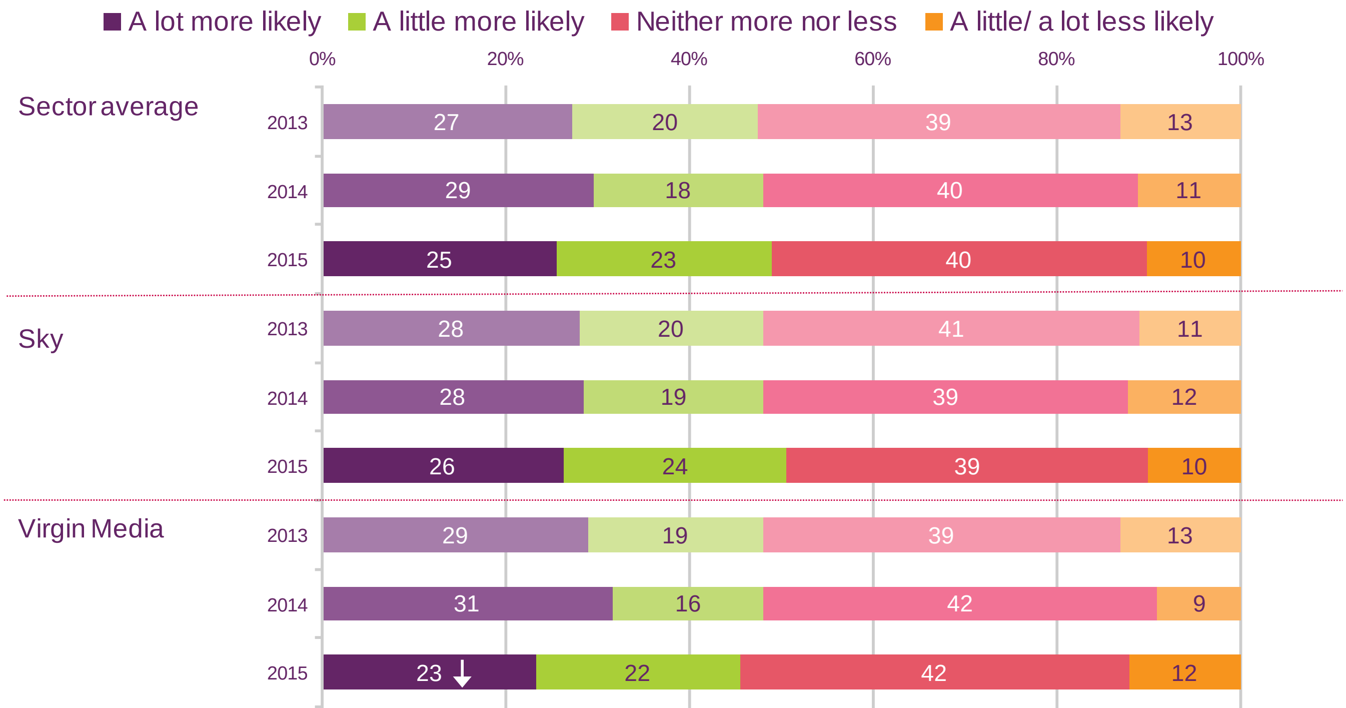
Customers who had contacted their pay TV provider were asked whether their most recent customer service experience had made them more or less likely to use their pay TV provider in the future. Results are shown at an overall level and by provider for 2013, 2014 and 2015 in Figure 75.

Around half of pay TV customers (48%) who had contacted their provider in the previous three months said their experience has made them more likely to use their provider in the future. One quarter (25%) said they were now 'a lot more likely' to use their pay TV provider again with one in ten (10%) saying they were now 'a little or a lot less likely'. Responses from customers of the individual pay TV providers did not vary from the sector overall.

Compared to 2014, there was a decrease in the proportion of Virgin Media customers saying they were now 'a lot more likely' to use the provider in the future (23% vs. 31% in 2014), but no change in the overall proportion saying they were 'a little or a lot more likely' (44%).

There were no other changes compared to 2014 in these measures for the pay TV sector overall or for the individual providers.

Figure 75: Future use of provider given customer service experience - pay TV: 2013-2015



Q7. Has your experience of [PROVIDER]'s customer service for this issue made you more or less likely to use [PROVIDER] in the future? (prompted responses, single coded)
Base: All UK households who contacted their Pay TV provider (In 2015 – 1000 Total, 500 Sky, 500 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2015.

↑↓ Indicates significantly higher/ lower 'A lot more likely' or 'less likely' compared to 2014 at the 99% confidence level.

Annex 1 – Table of figures

Annex 2 – Stage 1 and Stage 2 questionnaires

Stage 1 questionnaire – face-to-face omnibus

ASK ALL / MULTICODE OK FOR CODES 1-4 OR 6

Q.1 Which company does your household use for your landline telephone service and/or line rental?
IF NECESSARY - If you use more than one company one for calls and one for line rental please tell me both of these

1. BT
2. Virgin Media
3. TalkTalk
4. Sky
5. Don't have a landline telephone service
6. Other

DK. Don't Know

ASK ALL / SINGLE CODE

Q.2 And thinking of your personal mobile phone, which network are you on?
IF NECESSARY - So not one that might be provided to you by your work. If you have more than one mobile phone network provider, please tell me about the one you use most often.

1. O2
2. Orange
3. T-Mobile
4. 3
5. Virgin Mobile
6. Vodafone
7. EE
8. Tesco
9. Don't have a personal mobile
10. Other

DK. Don't Know

ASK ALL / SINGLE CODE

Q.3 Which company does your household use for its fixed broadband Internet connection?
IF NECESSARY - By this I mean broadband used through your household phone line, and not a mobile broadband connection where you would plug a USB dongle into your computer. If you have more than one household broadband Internet connection, please tell me about the one you use most often.

1. BT
2. Orange/EE
3. Sky
4. TalkTalk
5. Virgin Media
6. Don't have fixed broadband
7. Other

DK. Don't Know

ASK ALL / SINGLE CODE

Q.4 Which company does your household use for cable, satellite or other Pay TV, if any?
IF NECESSARY - If you use more than one company, please just tell me about the one which you use most often.

1. Sky
2. Virgin Media
3. BT TV (formerly BT Vision)
4. TalkTalk TV
5. Don't have pay TV
6. Other

DK. Don't Know

ASK FOR ALL COMPANIES CODED AT Q.1/ Q.2/ Q.3/ Q.4 (Q.1 CODES 01-04, Q.2 CODES 01-08, Q.3 CODES 01-05, Q.4 CODES 01-04) BUT ONLY ASK EACH COMPANY ONCE IF USED FOR MORE THAN ONE PRODUCT:

SINGLE CODE

Q.6 Thinking of [COMPANY] and the services you buy from them, have you contacted them in the last 3 months by telephone, email, webchat or letter?

ASK FOR BT IF Q.1 CODE 01 OR Q.3 CODE 01 OR Q.4 CODE 03
ASK FOR VIRGIN IF Q.1 CODED 02 OR Q.2 CODED 05 OR Q.3 CODED 05 OR Q.4 CODED 02
ASK FOR TALKTALK IF Q.1 CODED 03 OR Q.3 CODED 04 OR Q.4 CODED 04
ASK FOR SKY IF Q.1 CODED 04 OR Q.3 CODED 03 OR Q.4 CODED 01
ASK FOR O2 IF Q.2 CODED 01
ASK FOR ORANGE IF Q.2 CODED 02 OR Q.3 CODED 02
ASK FOR T-MOBILE IF Q.2 CODED 03
ASK FOR 3 IF Q.2 CODED 04
ASK FOR VODAFONE IF Q.2 CODED 06
ASK FOR EE IF Q.2 CODED 07 OR Q.3 CODED 02
ASK FOR TESCO IF Q.2 CODED 08

1. Yes
2. No
3. DK

ASK Q.7 AND Q.8 IN A LOOP FOR THESE SPECIFIED PROVIDERS IF:

- BT - IF USE BT AT 2 OR MORE OF Q.1/Q.3/Q.4 AND CODE 01 FOR BT AT Q.6
- VIRGIN - IF USE VIRGIN AT 2 OR MORE OF Q.1/ Q.2/ Q.3/ Q.4 AND CODE 01 FOR VIRGIN AT Q.6
- TALKTALK - IF USE TALKTALK AT 2 OR MORE OF Q.1/ Q.3/Q.4 AND CODE 01 FOR TALKTALK AT Q.6
- SKY - IF USE SKY AT 2 OR MORE OF Q.1/ Q.3/ Q.4 AND CODE 01 FOR SKY AT Q.6
- ORANGE - IF USE ORANGE AT Q.2 AND Q.3 AND CODE 01 FOR ORANGE AT Q.6
- EE - IF USE EE AT Q.2 AND Q.3 AND CODE 01 FOR EE AT Q.6

MULTICODE – ONLY SHOW RELEVANT SERVICES TO INTERVIEWER

Q.7 Thinking now of the MOST RECENT issue you had to contact [COMPANY] about, which of the services that you buy from them was it relating to, was it for [LIST SERVICES USED], or was it a general issue that applies to all?

1. Landline phone service (FROM Q.1)
2. Mobile phone (FROM Q.2)
3. Broadband (FROM Q.3)
4. Cable, satellite or other Pay TV (FROM Q.4)
5. General issue
6. Don't Know

ASK Q.8 FOR ALL COMPANIES CODED AT Q.1/ Q.2/ Q.3/ Q.4 (Q.1 CODES 01-04, Q.2 CODES 01-08, Q.3 CODES 01-05, Q.4 CODES 01-04) AND CODED 01 AT Q.6 BUT ONLY ASK EACH COMPANY ONCE IF USED FOR MORE THAN ONE PRODUCT:

- ASK FOR BT IF Q.1 CODE 01 OR Q.3 CODE 01 OR Q.4 CODED 03 AND Q.6 CODE 01
- ASK FOR VIRGIN IF Q.1 CODES 02 IF Q.2 CODED 05 OR Q.3 CODED 05 OR Q.4 CODED 02 AND Q.6 CODE 01
- ASK FOR TALKTALK IF Q.1 CODED 03 OR Q.3 CODED 04 OR Q.4 CODED 04 AND Q.6 CODE 01
- ASK FOR SKY IF Q.1 CODED 04 OR Q.3 CODED 03 OR Q.4 CODED 01 AND Q.6 CODE 01
- ASK FOR O2 IF Q.2 CODED 01 AND Q.6 CODE 01
- ASK FOR ORANGE IF Q.2 CODED 02 OR Q.3 CODED 02 AND Q.6 CODE 01
- ASK FOR T-MOBILE IF Q.2 CODED 03 AND Q.6 CODE 01
- ASK FOR 3 IF Q.2 CODED 04 AND Q.6 CODE 01
- ASK FOR VODAFONE IF Q.2 CODED 06 AND Q.6 CODE 01
- ASK FOR EE IF Q.2 CODED 07 OR Q.3 CODED 02 AND Q.6 CODE 01
- ASK FOR TESCO IF Q.2 CODED 08

SINGLE CODE, PROMPTED, ROTATE ORDER (EXCEPT 07 WHICH IS ALWAYS LAST)

Q.8 And thinking of the most recent issue you had to contact [COMPANY] about, which one of the following categories did the issue fall into? Was it to do with…

1. A billing, pricing or payment issue
2. A problem with your account details, for example name and address etc.
3. A fault with the service you are buying from them, for example total or partial failure of service
4. The service not performing as well as expected, for example issues with picture quality, broadband speed, mobile coverage etc.
5. Problems with the repair service, for example it didn't happen or didn't solve the problem
6. A problem relating to the installation or set up of your service
7. Or something else, a general issue

ASK ALL / MULTI CODE

Q.9 Have you personally had a reason to complain about any of these services or suppliers in the last 12 months, whether or not you went on to make a complaint?
READ OUT CODES 1-3 AND CODE ALL THAT APPLY
IF NECESSARY - By fixed broadband I mean broadband used through your household phone line.

1. Landline
2. Mobile phone
3. Fixed broadband internet
4. None of these (SINGLE CODE)

ASK Q.10 IF CODE 01 AT Q.9 / MULTI CODE

Q.10 What was the issue you had reason to complain about in connection with your landline?
DO NOT READ OUT

1. Disruption of service
2. Poor quality of service
3. Service not as promised/ advertised
4. Overcharged
5. Bill incorrect
6. Bill not received
7. Staff attitude/ problem with staff
8. Terms of contract were unfair
9. Charges not made clear/ unexpected charges
10. Advertised tariffs not available to me
11. Inappropriate content
12. Other - SPECIFY

ASK Q.11 IF CODE 01 AT Q.9 / SINGLE CODE

Q.11 And did you go ahead and make a complaint about your landline service or supplier?

1. Yes
2. No

ASK Q.12 IF CODE 02 AT Q.11 / MULTI CODE

Q.12 Why didn’t you make a complaint about your landline service or supplier?
DO NOT READ OUT

1. Did not know where to go/ who to complain to
2. Didn’t have the time
3. Not worth the hassle
4. They wouldn’t do anything anyway
5. The problem was sorted out
6. Other - SPECIFY

ASK Q.13 IF CODE 02 AT Q.9 / MULTI CODE

Q.13 What was the issue you had reason to complain about in connection with your mobile phone?
DO NOT READ OUT

1. Disruption of service
2. Poor quality of service
3. Poor coverage/ can't get a mobile signal
4. Service not as promised/ advertised
5. Speed of internet connection
6. Overcharged
7. Bill incorrect
8. Bill not received
9. Staff attitude/ problem with staff
10. Terms of contract were unfair
11. Charges not made clear/ unexpected charges
12. Advertised tariffs not available to me
13. Inappropriate content
14. Other - SPECIFY

ASK Q.14 IF CODE 02 AT Q.9 / SINGLE CODE

Q.14 And did you go ahead and make a complaint about your mobile service or supplier?

1. Yes
2. No

ASK Q.15 IF CODE 02 AT Q.14 / MULTI CODE

Q.15 Why didn't you make a complaint about your mobile service or supplier?
DO NOT READ OUT

1. Did not know where to go/ who to complain to
2. Didn't have the time
3. Not worth the hassle
4. They wouldn't do anything anyway
5. The problem was sorted out
6. Other - SPECIFY

ASK Q.16 IF CODE 03 AT Q.9 / MULTI CODE

Q.16 What was the issue you had reason to complain about in connection with your fixed broadband?
DO NOT READ OUT

1. Disruption of service
2. Poor quality of service
3. Service not as promised/ advertised
4. Speed of internet connection
5. Overcharged
6. Bill incorrect
7. Bill not received
8. Staff attitude/ problem with staff
9. Terms of contract were unfair
10. Charges not made clear/ unexpected charges
11. Advertised tariffs not available to me
12. Inappropriate content
13. Other - SPECIFY

ASK Q.17 IF CODE 03 AT Q.9 / SINGLE CODE

Q.17 And did you go ahead and make a complaint about your fixed broadband service or supplier?
DO NOT READ OUT

1. Yes
2. No

ASK Q.18 IF CODE 02 AT Q.17 / MULTI CODE

Q.18 Why didn't you make a complaint about your fixed broadband service or supplier?
DO NOT READ OUT

1. Did not know where to go/ who to complain to
2. Didn't have the time
3. Not worth the hassle
4. They wouldn't do anything anyway
5. The problem was sorted out
6. Other - SPECIFY

Stage 2 questionnaire – online panel

	INTRODUCTION
	Thank you for agreeing to take part in this survey. This research is being conducted to assess the standards of customer service that UK providers of mobile, fixed line, broadband and pay TV services offer to their customers. The interview should take approximately 5-6 minutes to complete. Please click here to begin
S1	**ASK ALL**
SINGLE CODE	Standard panel question to record exact age - CLOSE IF UNDER 18
S2	**ASK ALL**
SINGLE CODE	Standard panel question to record gender
S3	**ASK ALL**
SINGLE CODE PER PROVIDER (except A)	Which company does your household use for the following services, if any?

Which company does your household use for the following services, if any?

A. Landline telephone service or line rental (HOVER-OVER TEXT: If you use more than one company – one for calls and one for line rental – please tell me both of these)
B. Fixed Broadband internet (HOVER-OVER TEXT: This refers to broadband delivered via your household landline, NOT via a dongle or a 3G connection from a mobile operator)
C. Cable, satellite or other pay TV

And thinking of your personal mobile phone (so not one that might be provided by your work), which network are you on? If you use more than one mobile network, please select the one you use most for personal calls.

D. Personal mobile phone (HOVER-OVER TEXT: This refers to the network you use for mobile voice and SMS (not networks which are purely used for mobile broadband access)

SHOW ONLY RELEVANT CODES FOR EACH SERVICE (SEE TABLE ON NEXT PAGE)

Code frame (list alphabetically)	**Landline telephone service and/ or line rental**	**Fixed Broadband internet**	**Cable / Satellite / Other pay TV**	**Personal mobile phone**
1. BT	Y	Y		
2. Virgin	Y	Y	Y	Y
3. TalkTalk / AOL / Tiscali	Y	Y		
4. Sky	Y	Y	Y	
5. O_2				Y
6. Orange		Y		Y
7. Vodafone				Y
8. T-Mobile				Y
9. 3/Three				Y
10. EE (including Orange and T-Mobile)				Y
11. Other	Y	Y	Y	Y
12. Don't use this service	Y	Y	Y	Y

	CLOSE IF 'OTHER' OR 'DO NOT USE' CODED FOR EVERY SERVICE
S4	**ASK ALL USING AT LEAST ONE ELIGIBLE PROVIDER**
SINGLE CODE	Thinking of [PROVIDER] and the services you buy from them, have you contacted them in the last 3 months **by telephone, email, webchat or letter**? REPEAT FOR ALL ELIGIBLE PROVIDERS IN A LOOP USING AT S3, ASK ONLY ONCE FOR EACH PROVIDER, EVEN IF USE MORE THAN ONE SERVICE FROM THEM 1. Yes 2. No IF S4= 2 (NO) FOR ALL PROVIDERS SCREEN OUT
S5	**ASK IF USE ANY PROVIDER FOR MORE THAN ONE SERVICE AT S3, AND HAVE CONTACTED THEM AT S4**
MULTI CODE	Thinking of the most recent issue that you had to contact [PROVIDER] about, which of the services that you buy from them was it relating to? Please tick all that apply. SHOW ONLY SERVICES BEING USED BY THE RESPONDENT 1. Landline telephone service or line rental 2. Fixed Broadband internet 3. Cable/Satellite/ other pay TV 4. Mobile phone services (not including mobile broadband)
S6	**ASK FOR ALL PROVIDERS CONTACTED (S4=1). IF NO PROVIDERS CONTACTED (S4=1), CLOSE**
SINGLE CODE	And thinking of the most recent issue that you had to contact [PROVIDER] about, which of the following categories did the issue fall into? ROTATE ORDER OF OPTIONS, WITH THE EXCEPTION OF CODE 7, WHICH IS ALWAYS THE LAST 1. A billing, pricing or payment issue 2. A problem with your account details, for example name and address etc. 3. A fault with the service you are buying from them, for example total or partial failure of service 4. The service not performing as well as expected, for example issues with picture quality, broadband speed, mobile coverage etc. 5. Problems with the repair service, for example it didn't happen or didn't solve the problem 6. A problem relating to the installation or set up of your service 7. Or something else, a general issue

S7A-C	ASK FOR ALL PROVIDERS CONTACTED (S4=1)
SINGLE CODE	And more specifically, which of the following best describes what the issue with [PROVIDER] was concerning? ROTATE CODES WITHIN EACH HEADING, EXCEPT FOR 'A DIFFERENT ISSUE' WHICH IS ALWAYS LAST RESPONDENT IS ONLY SHOWN CODES RELATING TO THE SERVICE THEY USE THE PROVIDER FOR, OR IF CALL WAS RELATING TO MULTIPLE SERVICES, THEN FOR ALL THOSE SERVICES. CODES ARE RELEVANT TO ALL SERVICES UNLESS MARKED SPECIFICALLY IN BRACKETS AFTERWARDS. **A. Billing (USE THIS LIST IF CODES 1 OR 2 AT S6)** 1. Bill was inaccurate 2. Bill contained items I shouldn't have been charged for 3. Pre-pay credit lost or not credited to card (MOBILE) 4. Costs of international and roaming calls (MOBILE) 5. Needed help to understand the bill 6. Bill was a lot higher than expected 7. The format of the bill 8. Payment issues (including setting up/making a payment, non-direct debit charges) 9. Account details (name, address, tariff, package etc.) 10. Getting a refund, credit note or cashback 11. A different issue (please describe it briefly in your own words) _____ **B. Faults and repairs (USE THIS LIST IF CODES 3,4,5 AT S6)** 1. Poor line quality (LANDLINE) 2. Poor reception/coverage (MOBILE) 3. Text or voice mails delivered late (MOBILE) 4. Problems with calls being disconnected during a call or not connected at all (MOBILE) 5. Arranging an appointment for an engineer visit (LANDLINE/BROADBAND/PAY TV) 6. Complaining about an engineer (LANDLINE/BROADBAND/PAY TV) 7. Time taken to repair a fault 8. Connection speed too slow (BROADBAND) 9. Problems with voice over internet (VOIP) telephone calls (BROADBAND) 10. A different issue (please describe it briefly in your own words) _____ **C. General enquiries (USE THIS LIST IF CODE 6 & 7 AT S6)** 1. Mis-selling 2. Keeping your mobile phone number when changing suppliers (MOBILE) 3. Time taken to install the service (LANDLINE/BROADBAND/PAY TV) 4. Damage to property during installation or repair (LANDLINE/BROADBAND/PAY TV) 5. Unsolicited contacts (e.g. sales and marketing calls or faxes, emails/spam, scams), (MOBILE/LANDLINE/BROADBAND) 6. Enquiring or complaining about the terms of your contract 7. General issues with customer service 8. Arranging an installation (LANDLINE/BROADBAND/PAY TV) 9. Buying your service 10. Change to your package or service (upgrading or downgrading your service) 11. Technical enquiry about the service 12. Enquiring about usage levels (hours/amount downloaded) and quotas/caps on usage (MOBILE/BROADBAND/LANDLINE) 13. Switching issues (e.g. problems trying to switch or switched without permission) 14. A different issue (please describe it briefly in your own words) _____

S8	RECORD FOR ALL PROVIDERS CONTACTED (S4=1)
MULTI-CODE	**RECORD ELIGIBLE QUOTA TYPE FOR SERVICE PROVIDER(S):**

	Landline telephone calls	**Broadband internet**	**Cable / Satellite TV**	**Personal mobile phone**
1. BT	A. Billing B. Fault C. General	A. Billing B. Fault C. General		
2. Virgin	A. Billing B. Fault C. General	A. Billing B. Fault C. General	A. Billing B. Fault C. General	A. Billing B. Fault C. General
3. TalkTalk / AOL / Tiscali	A. Billing B. Fault C. General	A. Billing B. Fault C. General		
4. Sky	A. Billing B. Fault C. General	A. Billing B. Fault C. General	A. Billing B. Fault C. General	
5. O_2				A. Billing B. Fault C. General
6. Orange*				
7. Vodafone				A. Billing B. Fault C. General
8. T-Mobile*				
9. 3				A. Billing B. Fault C. General
10. EE*(Quota covers any of Orange/ T-Mobile/ EE)				A. Billing B. Fault C. General

DUMISSUETYPE – S6:
A. BILLING=S6=1-2
B. FAULT=S6=3-5
C. GENERAL=S6=6-7

SERVICE SATISFACTION

– ASK THIS SECTION FOR EACH ELIGIBLE PROVIDER IN TURN

Q1	ASK FOR ALL PROVIDERS CONTACTED AT S4, AND SEPARATELY FOR EACH SERVICE USED (SO MULTIPLE TIMES FOR BUNDLED PROVIDERS)
SINGLE CODE	Overall how satisfied would you say you are with [PROVIDER] as your provider of [SERVICE] on a 1 to 10 scale where 10 means you are extremely satisfied, and 1 means you are extremely dissatisfied? 10 – Extremely satisfied 9 8 7 6 5 4 3 2 1 – Extremely dissatisfied
Q2	**ASK ALL – ONLY ONCE PER PROVIDER CONTACTED, REGARDLESS OF BUNDLING**
SINGLE CODE	We're now going to concentrate on the most recent issue that you had to contact [PROVIDER] about. In dealing with [PROVIDER] about this did you contact them only on the phone, mainly on the phone, only via another method (email, webchat or letter) or mainly via another method (email, webchat or letter)? 1. Only on the phone 2. Mainly on the phone 3. Only via another contact method 4. Mainly via another contact method 5. Don't Know
Q3	**ASK ALL – ONLY ONCE PER PROVIDER CONTACTED, REGARDLESS OF BUNDLING**
SINGLE CODE	Overall, how satisfied are you with the service you received from [PROVIDER] customer services on this occasion? Please give your rating on a scale from '1' to '10', where '10' means that you are extremely satisfied and '1' means you are extremely dissatisfied? 1. Extremely dissatisfied 2. 3. 4. 5. 6. 7. 8. 9. 10. Extremely satisfied

Q4	**ASK ALL – ONLY ONCE PER PROVIDER CONTACTED, REGARDLESS OF BUNDLING**
SINGLE CODE	And how satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied. **NB: If a statement does not apply to the contact you made, please select, 'Not applicable'** RANDOMISE WITHIN EACH HEADING. SCREEN 1: Contacting… A. Ease of finding provider contact details B. Calling back when they said they would C. Ease of getting through to the right person (PHONE) Speed… D. Speed of answering phones (PHONE) E. The time taken to handle your issue Standard of advice… F. Advice/information was easy to understand G. Advice/information was useful H. Getting the issue resolved to your satisfaction SCREEN 2: advisor… I. Courtesy and politeness of advisors J. advisor ability to understand the issue and identify the problem K. advisor took my question/issue seriously L. Keeping you informed throughout the process M. advisor doing what they said they would do N. Logging of query details to avoid having to repeat yourself General… O. Offering compensation or a goodwill payment P. Willingness to help resolve your issue
Q5	**ASK ALL – ONLY ONCE PER PROVIDER CONTACTED, REGARDLESS OF BUNDLING**
SINGLE CODE	In your opinion, was [PROVIDER] able to successfully resolve your issue? 1. Completely resolved 2. Partly resolved 3. Not resolved at all 4. Don't know

Q5a	**ASK ALL – ONLY ONCE PER PROVIDER CONTACTED, REGARDLESS OF BUNDLING**
SINGLE CODE	And in your opinion, was the reason for this contact with [PROVIDER] a complaint, or something else? 1. Complaint 2. Something else 3. Don't know
Q6	**ASK ALL – ONLY ONCE PER PROVIDER CONTACTED, REGARDLESS OF BUNDLING**
SINGLE CODE	How many times have you been in contact with [PROVIDER] in relation to this particular issue so far? Please take your best guess if you cannot remember exactly how many this is. 1. Once 2. Twice 3. Three times 4. Four times 5. Five times or more 6. Don't know
Q7	**ASK ALL – ONLY ONCE PER PROVIDER CONTACTED, REGARDLESS OF BUNDLING**
SINGLE CODE	Has your experience of [PROVIDER]'s customer service for this issue made you more or less likely to use [PROVIDER] in the future? 1. A lot more likely 2. A little more likely 3. Neither more nor less likely 4. A little less likely 5. A lot less likely 6. Don't know

Q9	ASK IF NOT COMPLETELY RESOLVED AT Q5 – ONLY ONCE PER PROVIDER CONTACTED, REGARDLESS OF BUNDLING
SINGLE CODE	In your opinion, is the issue with [PROVIDER] closed or still ongoing? 1. Closed 2. Still ongoing 3. Don't know
Q10	**ASK ALL – ONLY ONCE PER PROVIDER CONTACTED, REGARDLESS OF BUNDLING**
SINGLE CODE	IF COMPLETELY RESOLVED AT Q5 (CODE 1) – How long did it take to resolve the issue with [PROVIDER]? IF CLOSED AT Q9 (CODE 1)– How long did it take to reach a point with [PROVIDER] where the issue was closed? IF STILL ONGOING OR DON'T KNOW AT Q9 (CODES 2-3) – How long did it take to reach this point in terms of your issue with [PROVIDER]? 1. Less than 1 hour 2. Several hours 3. 1 day 4. 2-4 days 5. 5-7 days 6. 8-14 days 7. 15-30 days 8. Over 30 days 9. Not sure

CLASSIFICATION

CL1	**ASK ALL MOBILE OWNERS WHO HAVE ANSWERED ABOUT A CUSTOMER SERVICE EVENT FOR AN ELIGIBLE MOBILE NETWORK AT S3D**
SINGLE CODE	Is your personal mobile phone on a contract or pay as you go? 1. Contract (with monthly bills) 2. Pay as you go 3. Don't know
CL2	**ASK ALL**
SINGLE CODE	What is your current employment status? 1. Employed or self-employed (full-time) 2. Employed or self-employed (part-time) 3. Homemaker 4. Student / under education 5. Temporarily not working (unemployed / illness) 6. Retired
CL3	**ASK ALL**
SINGLE CODE	Approximately, what is your total annual income before tax? 1. Under £5,000 2. £5,000 to £9,999 3. £10,000 to £19,999 4. £20,000 to £29,999 5. £30,000 to £39,999 6. £40,000 to £49,999 7. £50,000 to £59,999 8. £60,000 or more 9. Don't know 10. Would rather not say
CL4	**ASK ALL**
SINGLE CODE	Where do you live? 1. East Midlands 2. Eastern 3. London 4. North East 5. North West 6. Scotland 7. South East 8. South West 9. Ulster / Northern Ireland 10. Wales 11. West Midlands 12. Yorks & Humber

CL5	ASK ALL
MULTI CODE	And finally, which of these, if any, limit your daily activities or the work you can do? Please select all that apply 1. Breathlessness or chest pains 2. Poor vision, partial sight or blindness 3. Difficulty in speaking or in communicating 4. Poor hearing, partial hearing or deafness 5. Cannot walk at all / use a wheelchair 6. Cannot walk far or manage stairs or can only do so with difficulty 7. Limited ability to reach 8. Mental health problems or difficulties 9. Dyslexia 10. Other illnesses or health problems which limit your daily activities or the work that you can do (specify) 11. None 12. Don't know 13. Would rather not say
	SAY TO ALL
	Thank you for your time. These are all the questions we have for you. All your answers will be used to help us assess the level of services currently provided. Please be assured that all your responses will be used anonymously.

Annex 3 - Sample profile

Profile of the face-to-face omnibus survey data used for weighting – 4078 interviews

Fixed Line	Billing	Faults / Repairs	General queries	Total
BT	14%	11%	17%	43%
Virgin	7%	7%	8%	22%
TalkTalk	3%	5%	5%	13%
Sky	8%	4%	10%	22%
Total	32%	28%	40%	100%
			base:	*336*

Mobile	Billing	Faults / Repairs	General queries	Total
Virgin	2%	2%	3%	8%
O_2	6%	4%	16%	25%
EE[69]	11%	9%	16%	36%
Vodafone	8%	2%	8%	18%
3/Three	4%	3%	6%	13%
Total	30%	20%	50%	100%
			base:	*551*

Broadband	Billing	Faults / Repairs	General queries	Total
BT	6%	14%	13%	33%
Virgin	6%	12%	7%	24%
TalkTalk	3%	10%	5%	17%
Sky	8%	12%	6%	26%
Total	22%	47%	31%	100%
			base:	*488*

TV	Billing	Faults / Repairs	General queries	Total
Virgin	7%	13%	7%	26%
Sky	26%	22%	26%	74%
Total	33%	35%	33%	100%
			base:	*307*

[69] EE included households that used either EE, Orange or T-Mobile

Customer service experiences from the online panel survey – 5400 experiences

	Fixed Line	Mobile	Broadband	Pay TV
BT	300		400	
Virgin	300	200	400	500
TalkTalk	300		400	
Sky	300		400	500
O_2		400		
EE[70]		400		
Vodafone		400		
3/Three		200		

[70] EE included households that used either EE, Orange or T-Mobile