

Annex 2

Consumer research sources

- 1.1 This annex sets out the scope and methodologies for the main sources of consumer research Ofcom has drawn on for our analysis in *Comparing Service Quality*. The research methodology for our mobile research app can be found at [annex 3](#). The research methodology for our Home Broadband Performance research can be found in [in the report for that research](#).

Quality of Customer Service – Complaint handling

- 1.2 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 with a 4% or more market share). Following a review, in 2016 Ofcom has refocused the study to monitor customer satisfaction with [complaints handling](#). Consequently, this research monitors satisfaction with customer service provided to customers who have contacted their provider with a complaint in the six months prior to fieldwork. As such, the data is not comparable with previous quality of customer service research conducted by Ofcom.
- 1.3 The core aim of this study is to monitor satisfaction with customer service provided among customers who have made complaints to their provider in the last six months. The research was conducted via an online panel sample and fieldwork took place from 8 December 2016 to 6 January 2017. As such, the last six months refers to the six months prior to fieldwork (i.e. June 2016 – December 2016).
- 1.4 As with the previous quality of customer service research, this research includes UK communications providers with a market share of 4% or more (Q3 2016). The data is presented at both a total sector level and at a provider level. Total sector level data is weighted to be representative of the UK as a whole, and provider level data is unweighted. The provider level data is therefore representative of customers of the provider with a complaint in the six months prior to fieldwork and who are online.
- 1.5 Some of the data is presented as an ‘average number of days’, i.e. the average number of days to completely resolve a complaint. We have calculated the average number of days based on a waking day (16 hours), and the figures for each response are as follows:
- Less than 1 hour (0.03)
 - Several hours (0.09)
 - 1 day (1)
 - 2-4 days (3)
 - 5-7 days (6)
 - 8-14 days (11)
 - 15-30 days (22.5)
 - Over 30 days (31)

The report can be found at:

https://www.ofcom.org.uk/data/assets/pdf_file/0008/100610/quality-customer-service-research-2016.pdf

Data tables can be found at:

Total level data tables:

https://www.ofcom.org.uk/data/assets/pdf_file/0041/97898/22877/Ofcom_QoCS_Complaints_tables_wtd-total-market-crossbreaks2.pdf

Provider level data tables:

https://www.ofcom.org.uk/data/assets/pdf_file/0039/97896/22877/Ofcom_QoCS_Complaints_tables_unwtd.pdf

Quality of Customer Service – Reason to complain

- 1.6 Since 2009 Ofcom has been tracking the proportion of customers using a landline, broadband and mobile service who say they have had reason to complain about their provider in the previous 12 months. The 2016 research was conducted via a face to face omnibus among a representative sample of 6,000 UK adults, aged 16+. The fieldwork took place in December 2016. In this wave of research Pay TV was included for the first time.
- 1.7 The specific objectives are; to explore whether consumers have had reason to complain about their landline, fixed broadband, mobile and/or pay TV provider in the last 12 months, and if so, what was the reason for the complaint. To explore whether customers with a reason to complain actually went on to make a complaint, if they did, who did they complain to, and if they did not go on to make a complaint, why not. And, where sample size allows, to split information within each sector by communications provider.

The report can be found at:

https://www.ofcom.org.uk/data/assets/pdf_file/0016/100609/reason-complain-research-2016.pdf

Data tables can be found at:

https://www.ofcom.org.uk/data/assets/pdf_file/0025/97900/Reason-to-Complain_F2F_Data-tables-FOR-PUBLICATION.pdf

Overall satisfaction with service and reliability of service

- 1.8 Since 2007 Ofcom has run the Switching Tracker study among UK adults (decision makers in each market) to measure participation levels, switching incidence and ease of switching and satisfaction levels across the communications markets (landline, mobile, fixed broadband and multi-channel/Pay TV).
- 1.9 We have moved from RDD telephone interviewing (2014 and prior), through an interim year (2015) where interviewing was split to achieve half by telephone and half face-to-face, to conduct all of the interviewing in 2016 face-to-face (2576 interviews). Fieldwork took place in July – August 2016. On completion of the interviews, weighting of the data is applied for each of the markets using profiles from our Communications Tracking Survey.

Data tables can be found at:

https://www.ofcom.org.uk/data/assets/pdf_file/0025/95524/Switching-Tracker-2016-Data-tables.pdf

Quality of Service in Telecoms

- 1.10 Fieldwork for this qualitative project was conducted between 9 and 20 November 2015 and consisted of 20 group discussions, ten with residential consumers and ten with SME consumers. The research examined quality of service in relation to fixed

line, broadband internet and mobile phone services. Each group lasted 1½ hours and contained seven or eight participants.

- 1.11 The project was carried out in England, Scotland, Wales and Northern Ireland and groups were held in nine of the ten Openreach operational regions. Locations were also selected to include Virgin Media cable coverage areas where possible, and this was achieved in all but three of the rural locations.
- 1.12 The principal objective of the research was to understand residential consumers' and SMEs' good and bad experiences in relation to the quality of service received in relation to telecoms. The research focused on four key components of telecoms services:
 1. Service installations;
 2. Support or repair when things go wrong;
 3. Reliability of connection; and
 4. Customer service when contacting the provider for any other reason.
- 1.13 The ten residential groups were divided equally between urban and rural participants. The groups were also split equally between BC1 and C2D consumers. Each group featured a balanced mix of men and women, all of whom were the primary telecoms decision-maker in their household. Each group contained a mix of pre-family, with-family and post-family participants. Finally, all participants classified themselves as 'poor' to 'average' in terms of telecoms knowledge.
- 1.14 Like the residential segment, the ten SME groups were split equally between urban and rural businesses and a variety of business sectors was represented. The groups included men and women who were the chief telecoms decision-maker in their business. Half the groups contained a mix of micro SMEs (one to nine employees, including sole traders) and small SMEs (ten to 49 employees). The other half contained medium SMEs (50 to 249 employees.)
- 1.15 In the residential and SME groups, all participants were users of broadband, fixed line and mobile phone services from a range of retail providers. Each respondent had also had recent experience (i.e. in the past three months) of at least two of the four quality of service components detailed above, with all four components represented within each group.
- 1.16 It should be noted that as the research report is based on the views and experiences of around 160 UK consumers who all had recent experience of at least two quality of service issues, the findings included in the report are therefore indicative and are not intended to be a comprehensive national picture of consumers' views.

The report can be found at:

https://www.ofcom.org.uk/_data/assets/pdf_file/0025/78370/jigsaw_quality_of_service_in_telecoms.pdf

Automatic compensation: Consumer experience of provisioning delays, loss of service and missed appointments

- 1.17 Quantitative research to inform Ofcom's Automatic Compensation consultation was conducted between 16 December 2016 and 27 January 2017 among 2,088 residential consumers and 1,006 SMEs (businesses with between 1 and 249 directors/employees).

- 1.18 A nationally and regionally representative sample of 2,088 residential telecoms service consumers across the UK were interviewed face to face. Random location interviewing was used to ensure a good geographical spread. Controls were applied by region and sub-region, and quotas were set on age, gender, working status and tenure.
- 1.19 For the SME sample, an interlocking quota sample based on country/region and size was implemented. In addition to controlling the sample this way, non-interlocking quotas were set on industry sector to ensure broad alignment with UK business profiles. 1,006 telecoms decision makers across the UK were interviewed over the telephone.
- 1.20 All respondents (both residential and SME) were responsible for telecoms approach, policy and purchasing; covering the day to day processes, as well as the decision making regarding which telecoms suppliers and service their household/business used.
- 1.21 In both cases, the final data was weighted in order to align it to the sample profile of each universe.

The report can be found at:

https://www.ofcom.org.uk/data/assets/pdf_file/0026/98711/automatic-compensation-jigsaw-report.pdf