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GfK

QUALITY OF SERVICE

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Executive Summary of Findings

Situation

- Ofcom (Office of Communications) is the regulator for the UK communications industries, with responsibilities across television, radio, telecommunications and wireless communications services.
- Ofcom commissioned a study in 2009 to understand the quality of customer service (QoS) offered to users of broadband, mobile, fixed line and pay TV providers across the UK. This involved research to understand how customers perceive the quality of service received from their providers. The results are shared in this report.
- The findings of this report should not be used as a buyer's guide, nor as information to be relied on when considering the purchasing of particular services. The purpose of the research is to enable Ofcom to develop its policy towards the provision of QoS information by communications providers and great care should be taken in drawing any conclusions about the results – particularly the performance of individual providers.

The research provides only a snapshot of consumer experience taken at a single point in time and the exercise was restricted to a limited number of suppliers for whom we could most easily generate robust sample sizes. Full details of the methodology used, including how samples were drawn, are set out below.

Findings

Overall satisfaction

- Our research suggests that customers perceive UK providers of landline, broadband, mobile and pay TV services to provide a satisfactory contact experience in the majority of cases and levels of outright dissatisfaction are low.
- However, there are some differences in satisfaction by sector, with the broadband (60%) and landline (58%) sectors trailing mobile (69%) and pay TV (66%) sectors.

Impact on loyalty:

- There is evidence from all sectors that delivery on customer service not only shapes overall satisfaction ratings, but also customer loyalty. Outstanding customer service performance lifts customer retention levels, whereas under-delivery increases the risk of churn.

Contact profiles:

- There is some variation in the high level profile of contacts the different sectors have to deal with. Although 'general queries' dominate in all sectors, the landline and mobile sectors have higher proportions of billing related contacts, whereas the broadband sector has more contacts relating to faults/repairs.

Issue resolution:

- Most respondents said that issues raised were subsequently resolved - although in many cases this required more than one contact. The exception was fault/repair related contacts, particularly in broadband and mobile sectors where around one in five issues remained unresolved (in the eyes of the customer).

Objectives and Methodology

Research Aim

The purpose of the research was to gain an understanding of how satisfied respondents were with customer service in general and by particular topic and communications provider.

Methodology

The research study was divided into two stages. First, an omnibus survey of 2,000 end users and then an online survey on 12,000 end users.

In early October 2009, the omnibus survey was conducted. To obtain a market-wide view, it was necessary to ensure that the respondents had a similar incidence of contacting their provider, on particular topics and to particular providers as the general public. The omnibus survey provided this incidence data. The omnibus was designed to be representative of the UK population as a whole in terms of gender, age, social economic status, working and marital status.

The nationally representative omnibus sample was created by splitting the country into the 650 UK constituencies. The demographic profile of each these constituencies are known and this allows a geographically distributed representative sample to be created. Once the constituency had been identified, quotas were set by the above demographics to ensure interviewers obtained enough of each type of person to provide a UK-representative sample.

After the 2,000 omnibus interviews were completed, the incidence of contacts made in the last three months overall was established by subject and by provider in the UK population as a whole.

On a nationally representative sample, one would expect to see the majority of 'landline' contacts coming from BT and Virgin customers¹. Similarly, one would expect most contacts to be made to the largest 6 ISPs by market share in the 'broadband' market². However, in order to compare topics and

¹ BT and Virgin Media account for approximately 80% of residential exchange line numbers at end of quarter 1 2009. Ofcom - Telecommunications Market Data Update Q1 2009 (table 7). http://www.ofcom.org.uk/research/cm/tables/q1_2009/

² At the end of 2008 Ofcom estimate that the combined retail connection market share of the largest six ISPs was 91.5% and this figure rose further in 2009, with the acquisition of Tiscali by Carphone Warehouse (the owner of TalkTalk and AOL Broadband) in July 2009. (Figure 4.48), Ofcom CMR 2009. http://www.ofcom.org.uk/research/cm/cmr09/CMRMain_4.pdf

operators with any reliability, a minimum sample of 150 respondents were needed for each operator by topic.

It was not considered appropriate to try and achieve these minimum sample sizes (150+) using just the omnibus survey. This would have required significant resource and would not have been effective as the majority of interviews would relate to the main providers and give little or no added information. It was considered preferable to generate adequate sample sizes using a separate 'online' survey. The panellists were recruited for the online survey by a wide range of permission e-mail recruitment, affiliate networks and web site advertising, avoiding potential bias associated with panel recruitment from a single source or single methodology. To obtain a minimum of 150 interviews per topic/provider, areas of shortfall from the omnibus were identified. A screening questionnaire was then sent to panel members asking if they used a particular provider and had contacted them in the last 3 months. If they had, they were asked to take part in the longer questionnaire. A demographic mix of respondents was then interviewed. The questionnaire was open until the required number of respondents had taken part.

In total, 12,000 people were screened online during the rest of October 2009. The online survey was restricted to those people using service providers with the largest market shares. Those customers using service providers with relatively smaller market shares were not included as this would have required the researchers to approach many more people to ensure adequately robust samples. This would have generated significant additional cost without necessarily providing any additional insight into the issues we were seeking to understand. The purpose of this exercise was not to conduct a survey of the whole market but just a limited number of providers that would enable us to draw some indicative general conclusions on comparative customer service issues.

Once the online interviews were completed, they were merged with the omnibus results. To ensure that the online survey data did not skew the overall research, they were down-weighted to the original incidence found in the omnibus. For example, if 150 interviews were completed but only 80 were needed, each interview was multiplied by 0.53 to correct it. Additionally, minor weightings were applied to ensure the sample was nationally representative in terms of demographics.

In order to allow for potential fluctuations in the answers that are provided to any given question, a confidence interval of 99% is constructed around the result. This 99% interval contains the range in which if the same question was asked on a 100 different omnibuses, the answer would be within it 99 times. Therefore, if a group responds to that question with an answer that is outside the range, then it is justifiable to believe there is something that differentiates that group from the UK population as a whole.

Overview of Sectors

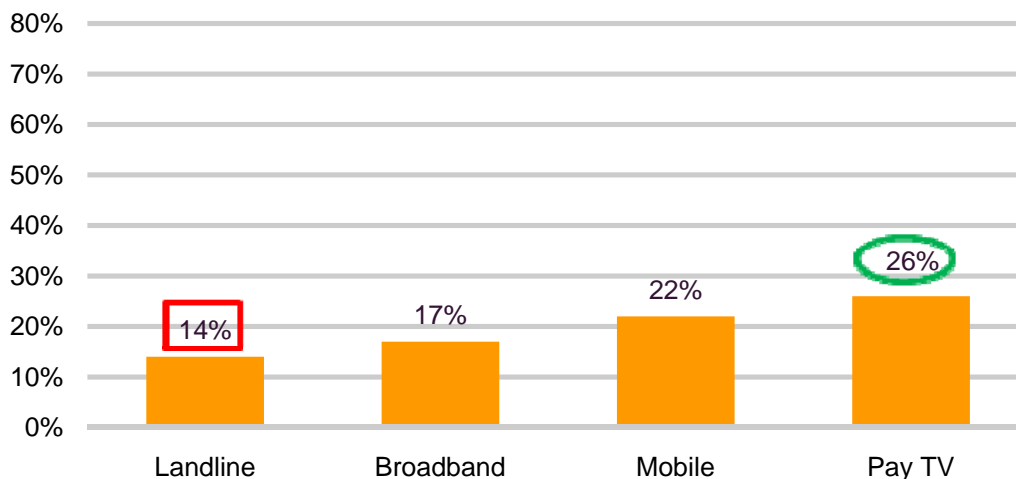
This section compares the different sectors in terms of incidence, method and frequency of contact, issue type, resolution levels, satisfaction with service, as well as interest in service rating information about different providers.

Recent contact with provider

Figure 1.1 (below) shows the proportion of customers who had contacted their service provider in the previous three months. These percentages are based on data from the GfK omnibus survey.

This chart shows that the highest incidence of contact was amongst pay TV customers (significantly higher than the total market), while lowest frequency of contact was for the landline sector (significantly lower than total market).

Figure 1.1 Proportion of customers who had contacted provider in last three months



Q: Thinking of [PROVIDER] and the services you buy from them, have you contacted them in the last 3 months by phone/ email...?

Base: All UK households using provider (Landline: 2,670/ Broadband: 2,025/ Mobile: 2,293/ Pay TV: 1,613).

○ / □ Indicates significantly higher/ lower than overall (99% test).

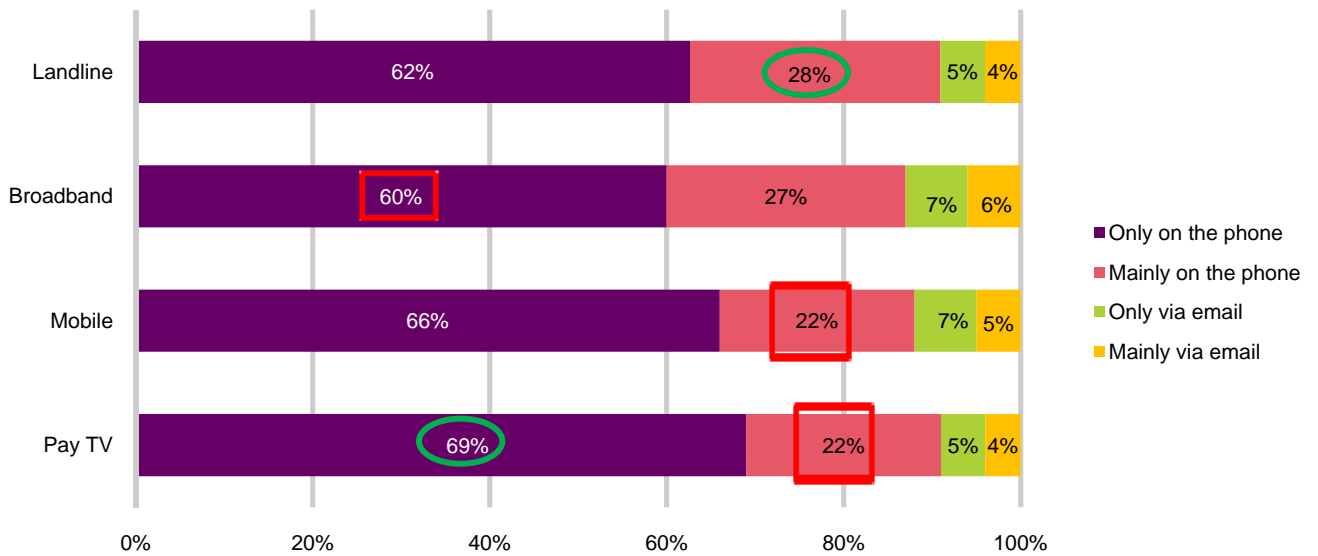
Source: GfK Omnibus survey

Type of contact with provider

Figure 1.2 (below) shows the way in which customers contacted their service providers.

The majority made contact solely or mainly by telephone, rather than by e-mail. Mobile and pay TV customers were significantly more likely than landline and broadband customers to have made only telephone contact, while broadband and mobile customers were more likely than mobile and pay TV customers to have made mostly email contact.

Figure 1.2: Type of contact made most recently



Q: In dealing with [PROVIDER] about this, did you contact them...?

Base: All UK households contacting provider (Landline: 1,337/ Broadband: 1,957/ Mobile: 1,926/ Pay TV: 1,343).

○ / □ Indicates significantly higher/ lower than overall (99% test).

Source: Online survey

Reason for recent contact with provider

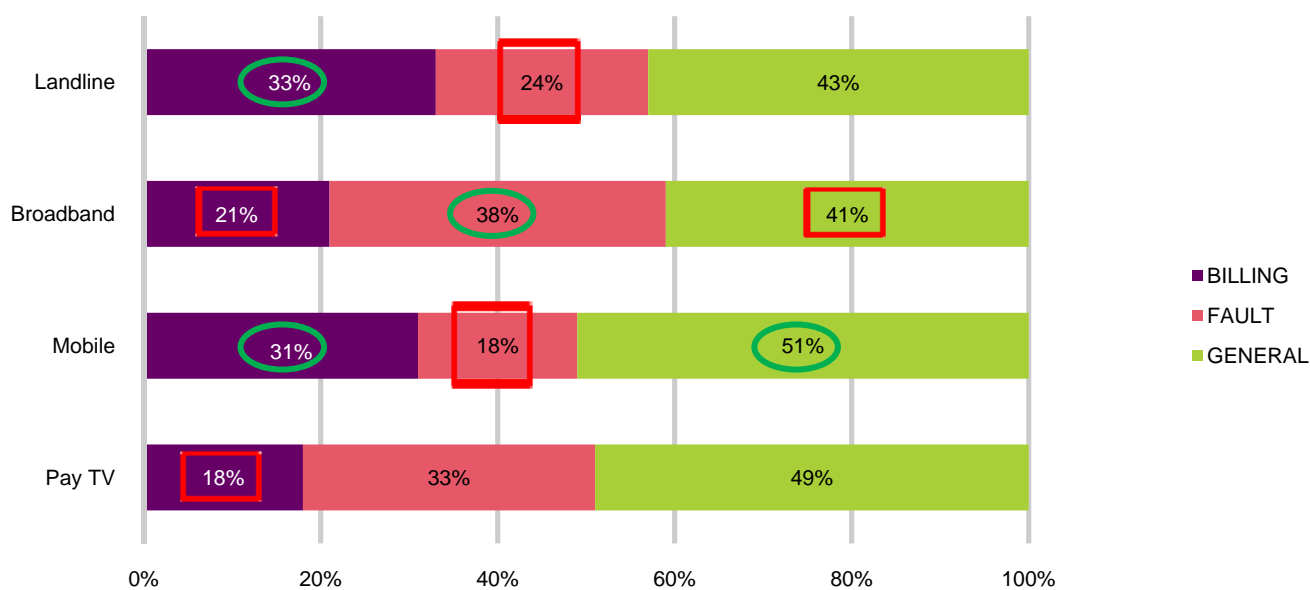
Figure 1.3 (below) shows the type of issue about which customers were contacting their service providers.

Contact profiles were categorised under billing, faults and general. 'Faults' covered fault and repair issues whilst 'general' covered all other enquiries not related to billing, faults or repairs. The three groups captured all the issues being dealt with by providers whilst helping to understand how the provider's customer service performance varied depending on the type of issue being dealt with.

While 'general' issues were most common in each sector, broadband and pay TV customers were significantly more likely than landline and mobile customers to have called about faults, while landline and mobile customers were more likely to have called about billing issues.

NB These issues are classified on the basis of what consumers indicated when questioned and therefore subject to interpretation. They may not necessarily be reflective of the actual calls received by the respective providers over the specified period.

Figure 1.3: Type of contact issue made most recently



Q: Thinking of the most recent issue you had to contact [PROVIDER] about, which of these categories did the issue fall into?
Base: All UK households contacting provider (Landline: 220/ Broadband: 388/ Mobile: 512/ Pay TV: 360).

○ / □ Indicates significantly higher/ lower than overall (99% test).

Source: GfK Omnibus survey

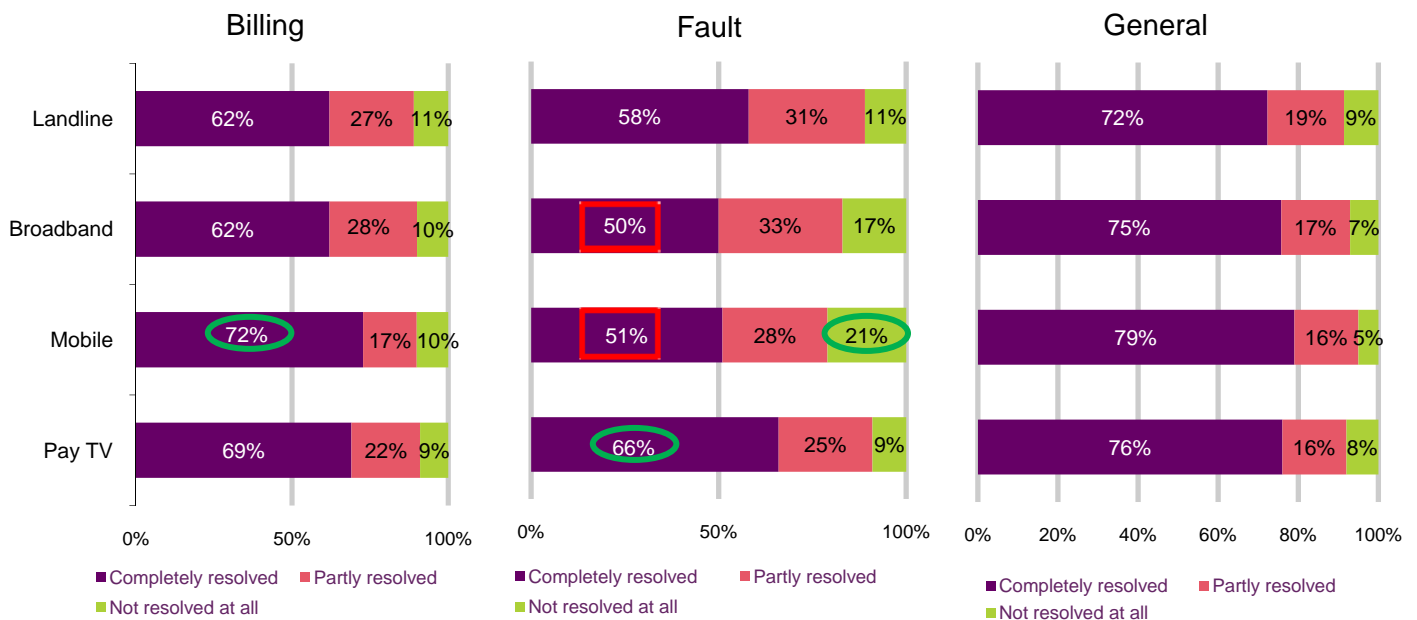
Degree of resolution of issue by provider

Figure 1.4 (below) shows, by issue type, whether the issue that customers were contacting their service provider about had been resolved from the customers' perspective.

The majority of issues in all sectors had been completely resolved although general enquiries were more likely to have been completely resolved than billing or faults issues.

Amongst those with billing issues, mobile and pay TV customers were significantly more likely to have had their issue completely resolved than landline or broadband customers. For faults issues, broadband and mobile customers were significantly less likely - and pay TV customers more likely - to have had full resolution.

Figure 1.4: Whether issue has been 'resolved'



Q: In your opinion, was [PROVIDER] able to successfully resolve your issue [Billing/Fault/General]?

Base: All UK households contacting provider (Landline: 623/ 293/ 421; Broadband: 591/ 768/ 598; Mobile: 734/ 499/ 693; Pay TV: 399/ 441/ 503).

○ / □ Indicates significantly higher/ lower than overall (99% test).

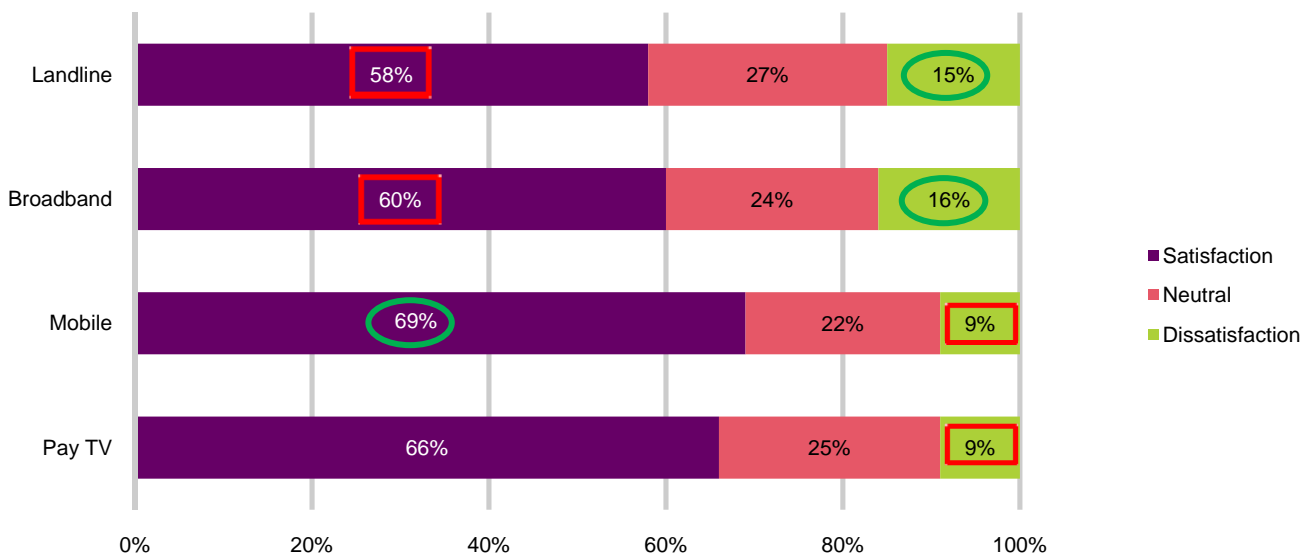
Source: Online survey

Satisfaction with provider’s customer service

Figure 1.5 (below) shows, for each sector, how satisfied customers were with the customer service provided by their service provider during their most recent contact. Satisfaction was rated on a scale from 1 to 10, with a 1 being completely dissatisfied and a 10 being completely satisfied. Ratings are grouped as follows: 7-10 satisfied, 4-6 neutral, 1-3 dissatisfied.

Over half the customers in this research were satisfied with the customer service they had received. Mobile and pay TV customers were significantly more likely to be satisfied, and less likely to be dissatisfied, than landline and broadband customers.

Figure 1.5: Satisfaction with customer service by sector



Q: Overall, how satisfied are you with the service you received from [PROVIDER] customer services on this occasion?
 Base: All UK households contacting provider (Landline: 1,337/ Broadband: 1,957/ Mobile: 1,926/ Pay TV: 1,343).

○ / □ Indicates significantly higher/ lower than overall (99% test).

Source: Online survey

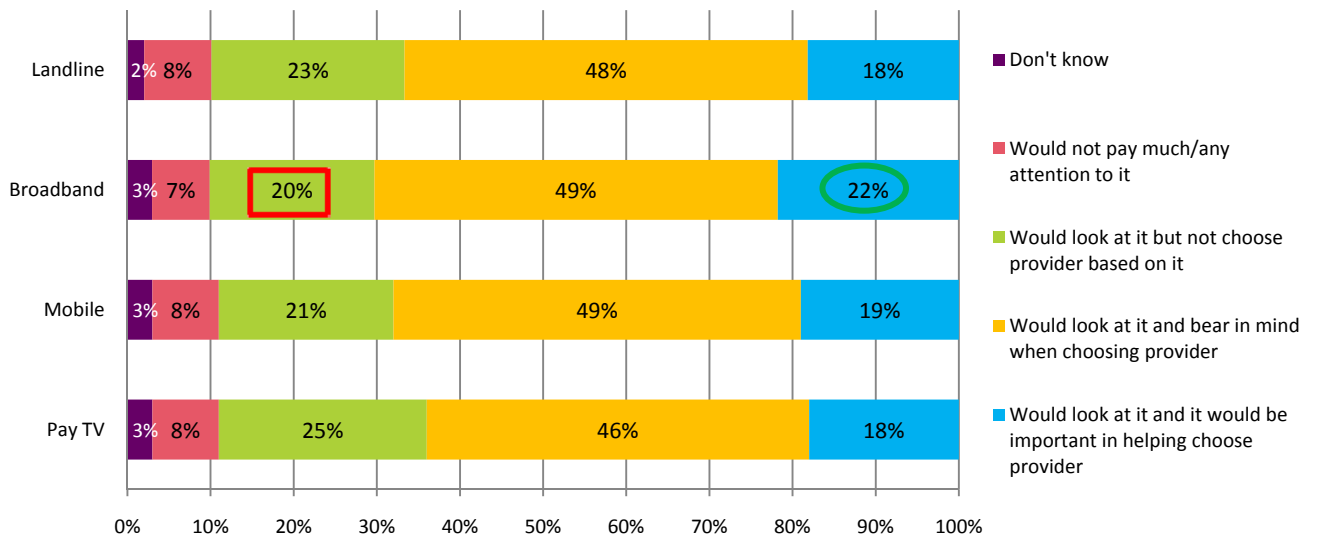
Interest in impartial service rating advice

Figure 1.6 (below) shows customer interest in provision of impartial information about different companies' customer service ratings. It is important to note that the figures represent only a subsection of the population; specifically, those who had contacted their service provider in the previous three months.

Across all four services, less than a quarter of customers suggested that they would use such information and that it would be important when choosing a service provider. However, broadband customers were more likely to say this type of information would be important in helping them choose a provider.

Figure 1.6: Need for impartial information – All services

NB: It is worth noting in this type of questioning that customers tend to overstate intention to act and in reality actions are likely to be lower.



Q: Assuming you were provided with information about different companies' customer service ratings, so that you could distinguish between good and bad performance... Which of the following statements do you think would best describe your attitude to that information if you were thinking about changing from [PROVIDER] to an alternative provider ...?

Base: All UK households contacting provider (Landline: 1,337/ Broadband: 1,957/ Mobile: 1,926/ Pay TV: 1,343).

○ / □ Indicates significantly higher/ lower than overall (99% test).

Source: Online survey

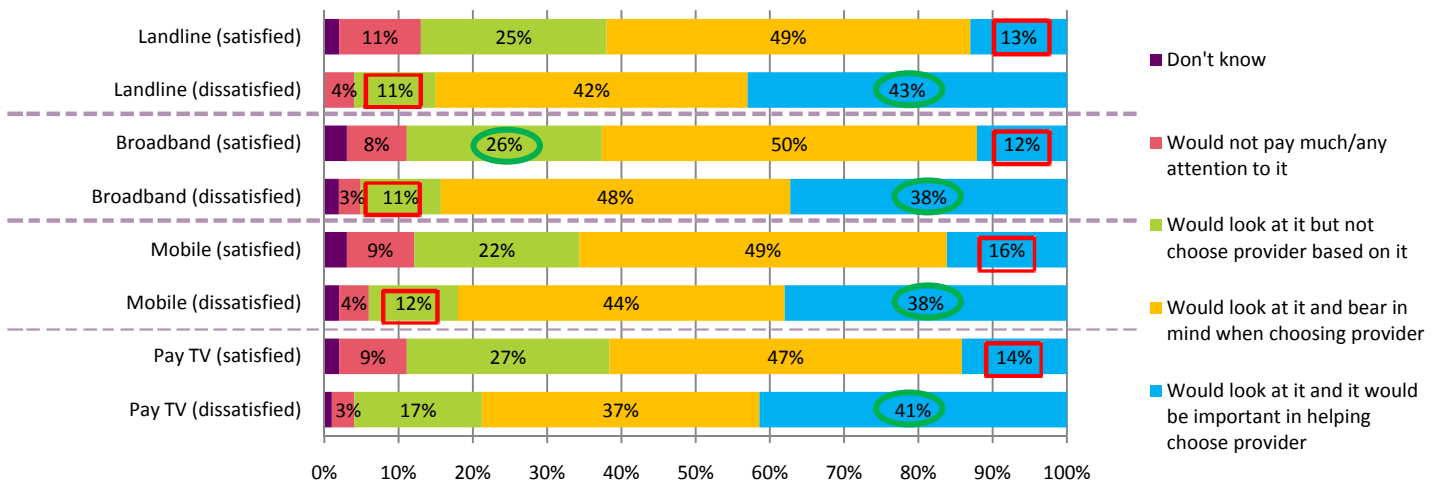
Interest in impartial service rating advice by satisfaction with service

Figure 1.7 (below) also shows interest in impartial information about companies' service ratings, but this time split by satisfied versus dissatisfied customers in each sector. As with the previous chart, the figures only represent the subsection of customers who had contacted their service provider in the previous three months.

Only a minority of customers who had contacted their service provider and been satisfied with the experience considered that impartial rating information about companies would be important in their choice of provider. However, dissatisfied customers across all service providers were significantly more likely to say such information would be important; around four in ten, compared with fewer than two in ten satisfied customers.

Figure 1.7: Need for impartial information – All services

NB: It is worth noting in this type of questioning that customers tend to overstate intention to act and in reality actions are likely to be lower.



Q: Assuming you were provided with information about different companies' customer service ratings, so that you could distinguish between good and bad performance... Which of the following statements do you think would best describe your attitude to that information if you were thinking about changing from [PROVIDER] to an alternative provider ... ?

Base: All UK households contacting provider (Landline Sat/Dis: 773/195; Broadband Sat/Dis: 1131/309; Mobile Sat/Dis: 1278/197; Pay TV Sat/Dis: 877/128).

○ / □ Indicates significantly higher/ lower than overall score for each sector (99% test).

Source: Online survey

Appendix

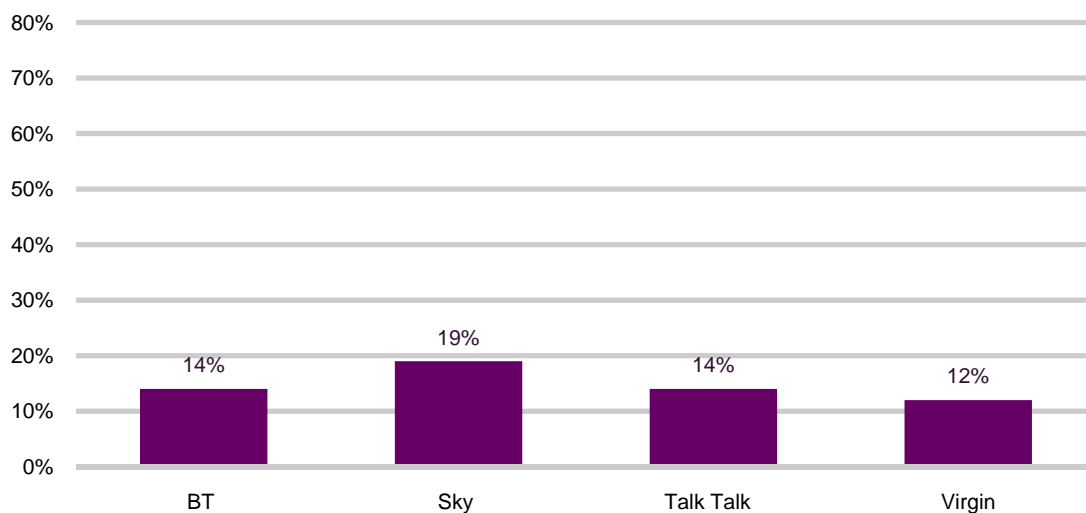
Landline Sector Charts

The following charts look specifically at the landline sector, in terms of service providers contacted, types of issues calling about, type of contact used, level of issue resolution, number of contacts required, and satisfaction with the service.

Recent contact with provider

Figure 2.1 (below) shows the proportion of customers of different landline providers who had contacted that provider in the last three months.

Figure 2.1: Landline – Proportion of customers who have contacted their landline provider about an issue in the last three months



Q: Thinking of [PROVIDER] and the services you buy from them, have you contacted them in the last 3 months by phone/ email?

Base: All UK households using providers (BT: 1,826/ Sky: 168/ Talk Talk: 281/ Virgin: 412).

○ / □ Indicates significantly higher/ lower than overall (99% test).

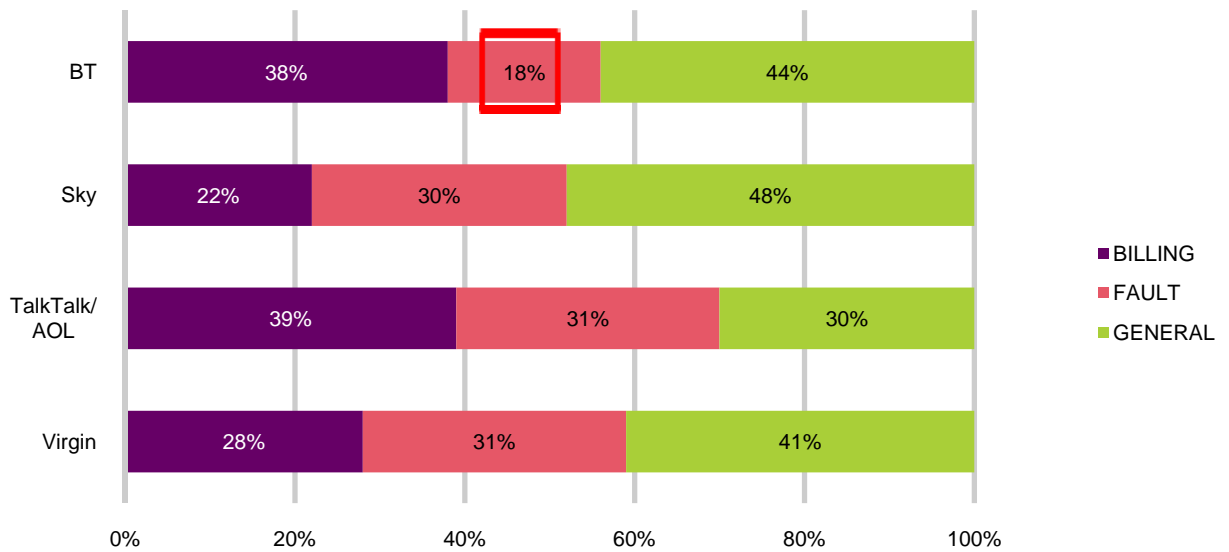
Source: GfK Omnibus Survey

Type of call made most recently with landline provider

Figure 2.2 (below) shows the type of call made to landline providers.

NB These issues are classified on the basis of what customers indicated when questioned and therefore subject to interpretation. They may not necessarily be reflective of the actual calls received by the respective providers over the specified period.

Figure 2.2: Landline – Type of call made most recently with landline provider



Q: Thinking of the most recent issue you had to contact [PROVIDER] about, which of the following categories did the issue fall into?

Base: All UK households using providers (BT: 1,826/ Sky: 168/ Talk Talk: 281/ Virgin: 412).

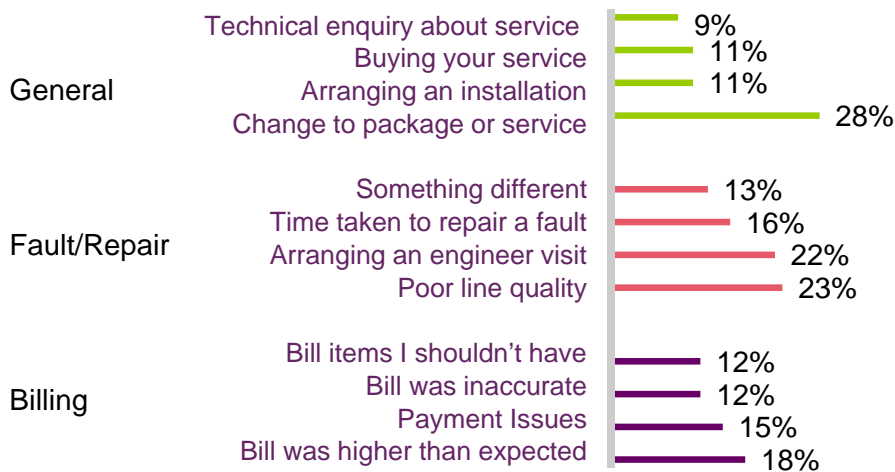
○ / □ Indicates significantly higher/ lower than overall (99% test).

Source: GfK Omnibus Survey

Key issues by contact type

Figure 2.3 (below) shows – for each of the three main types of issue – the most common specific reasons for recent contact with landline service providers..

Figure 2.3: Landline - Top four issues per contact type



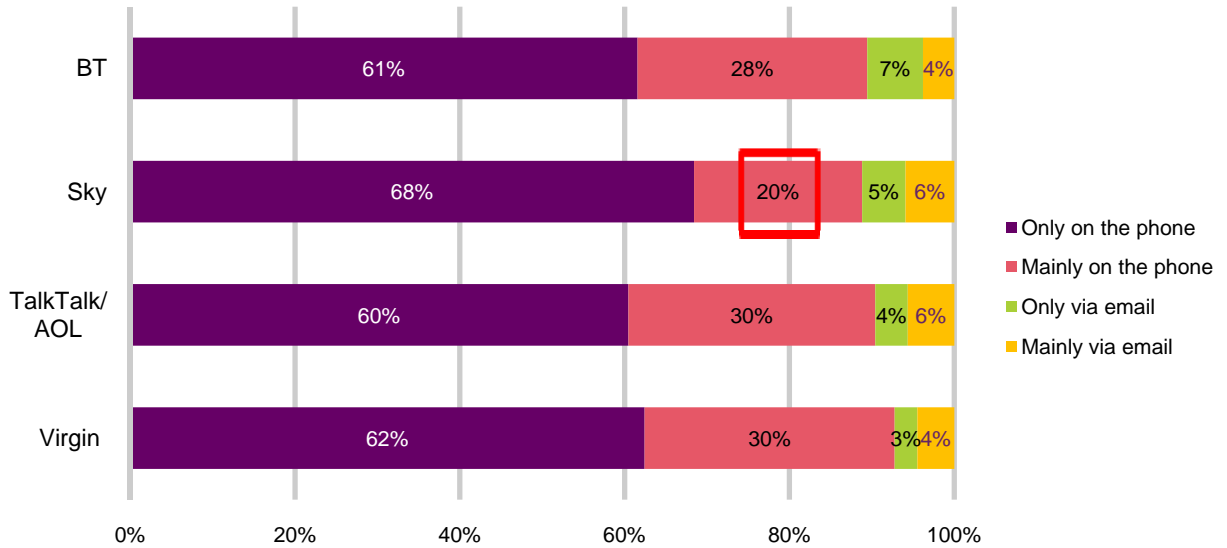
Q: Which of the following best describes what the issue with [PROVIDER] was concerning?
 Base: All UK households contacting provider (Billing: 623/ Fault: 293/ General: 421).

Source: Online survey

Type of contact made most recently with landline provider

Figure 2.4 (below) shows the way in which customers contacted their landline providers.

Figure 2.4: Landline – Type of contact made most recently with landline provider



Q: Thinking of the most recent issue you had to contact [PROVIDER] about, did you contact them only on the phone, mainly on the phone, only via email or mainly via email?

Base: All UK households contacting provider (BT: 617/ Sky: 207/ TalkTalk/AOL: 211/ Virgin: 302).

○ / □ Indicates significantly higher/ lower than overall (99% test).

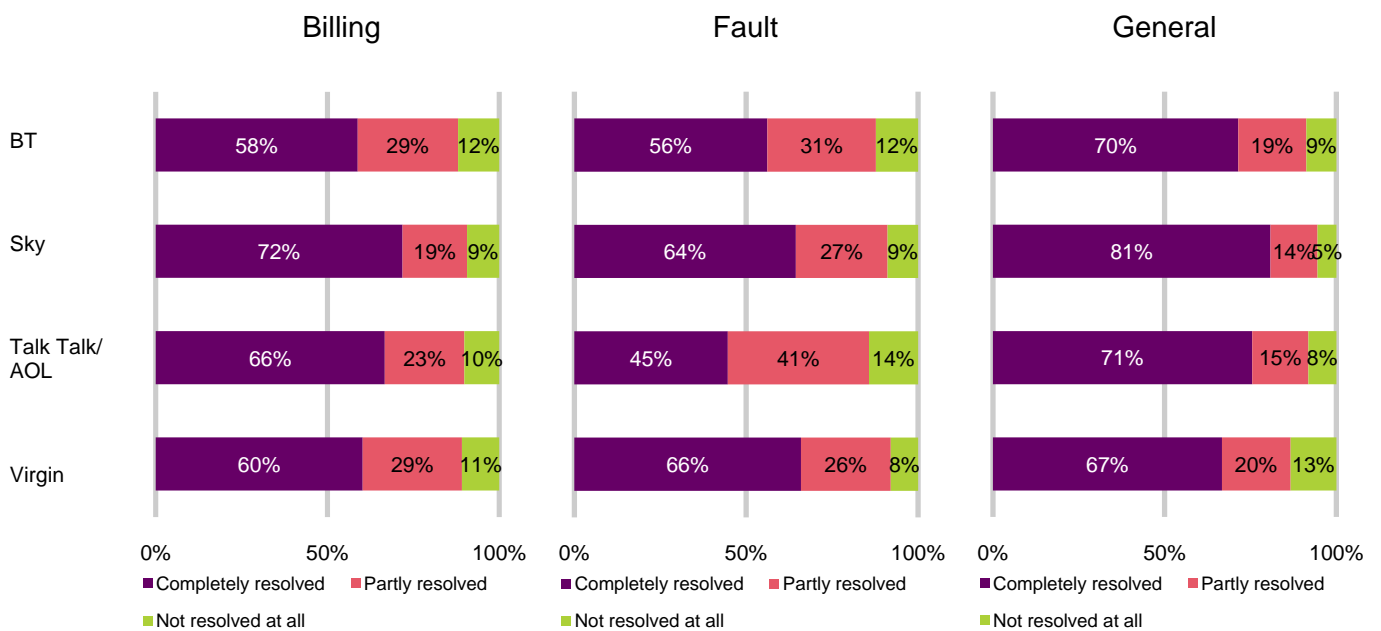
Source: Online Survey

Issue resolution by landline provider

Figure 2.5 (below) shows the degree of issue resolution by landline providers.

NB The information below is based on customers' interpretation of contact. They may not necessarily be reflective of the actual contacts received by the respective providers over the specified period.

Figure 2.5 Landline – Whether issue is seen as 'resolved'



Q: In your opinion, was [PROVIDER] able to successfully resolve your issue [billing/ faults/ general enquiries]?
 Base: All UK households contacting provider (BT: 313/118/186; Sky: 93/50/71**; TalkTalk/AOL: 87/51/73**; Virgin: 130/81/91).

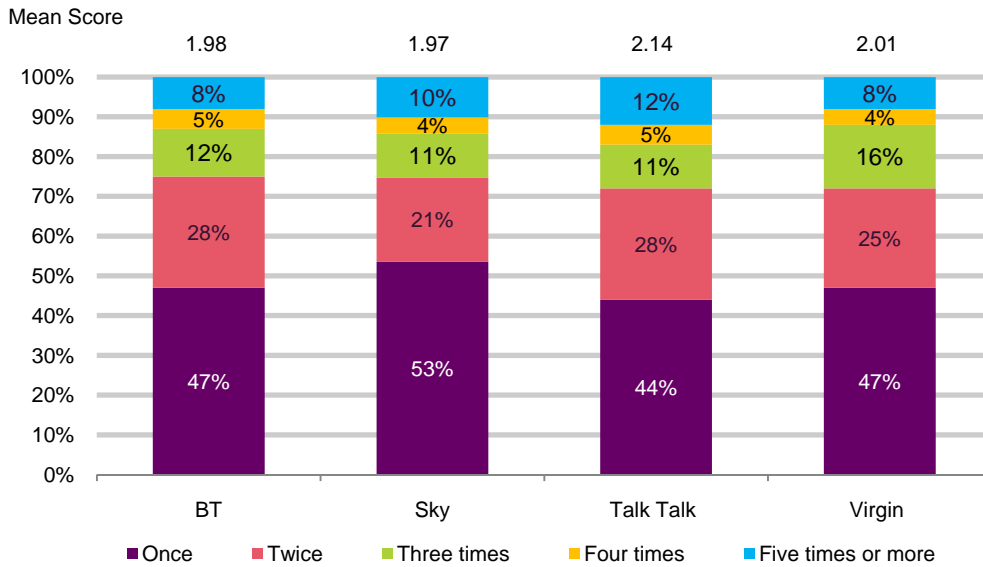
○ / □ Indicates significantly higher/ lower than overall (99% test).
 ** Caution: Low base, results should be treated as indicative only.

Source: Online Survey

Number of contacts with landline provider

Figure 2.6 (below) shows the number of times customers claimed they had contacted their landline providers regarding their most recent issue. .

Figure 2.6: Landline – Number of contacts made, by provider



Q: How many times have you been in contact with [PROVIDER] in relation to this particular issue so far?
 Base: All UK households contacting provider (BT:617/ Sky:207/ TalkTalk/AOL:211/ Virgin:302)

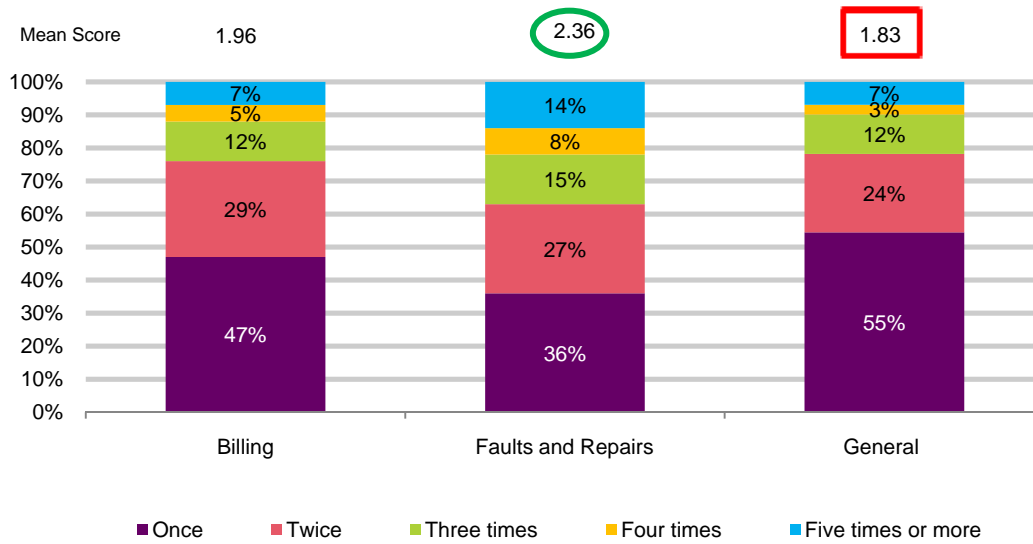
○ / □ Indicates significantly higher/ lower than overall (99% test).

Source: Online Survey

Number of contacts made, by issue type

Figure 2.7 (below) shows – for each of the three issue types – the number of contacts required with the service provider in order to resolve the issue..

Figure 2.7 Landline – Number of contacts made, by issue type



Q: How many times have you been in contact with [PROVIDER] in relation to this particular issue so far?
 Base: All UK households contacting provider (Billing:623/ Faults:293/ General:421).

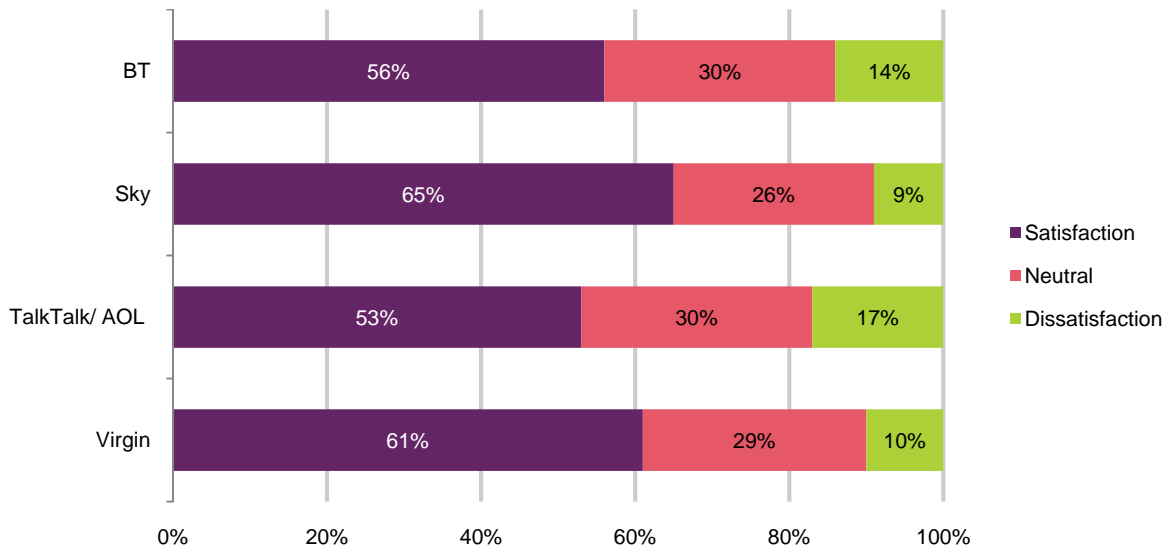
○ / □ Indicates significantly higher/ lower than overall (99% test).

Source: Online survey

Overall satisfaction with landline provider

Figure 2.8 (below) shows levels of overall satisfaction with landline providers.

Figure 2.8: Landline – Overall satisfaction by provider



Q: Overall how satisfied are you with [PROVIDER] as your provider of [service] on a 1 to 10 scale?
 Base: All UK households contacting provider (BT: 617 / Sky: 207 / TalkTalk/AOL: 211 / Virgin: 302).

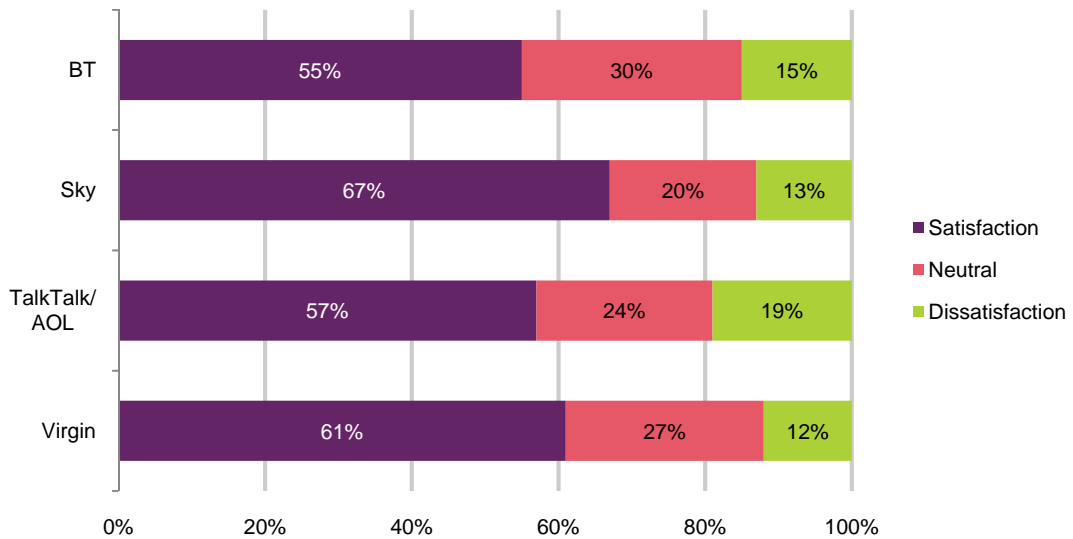
○ / □ Indicates significantly higher/ lower than overall (99% test).

Source: Online Survey

Satisfaction with customer service by landline provider

Figure 2.9 (below) shows levels of satisfaction with the customer service of landline providers.

Figure 2.9: Landline – Satisfaction with customer service by provider



Q: Overall how satisfied are you with [PROVIDER] as your provider of [service] on a 1 to 10 scale?
 Base: All UK households contacting provider (BT: 617 / Sky: 207 / TalkTalk/AOL: 211 / Virgin: 302).

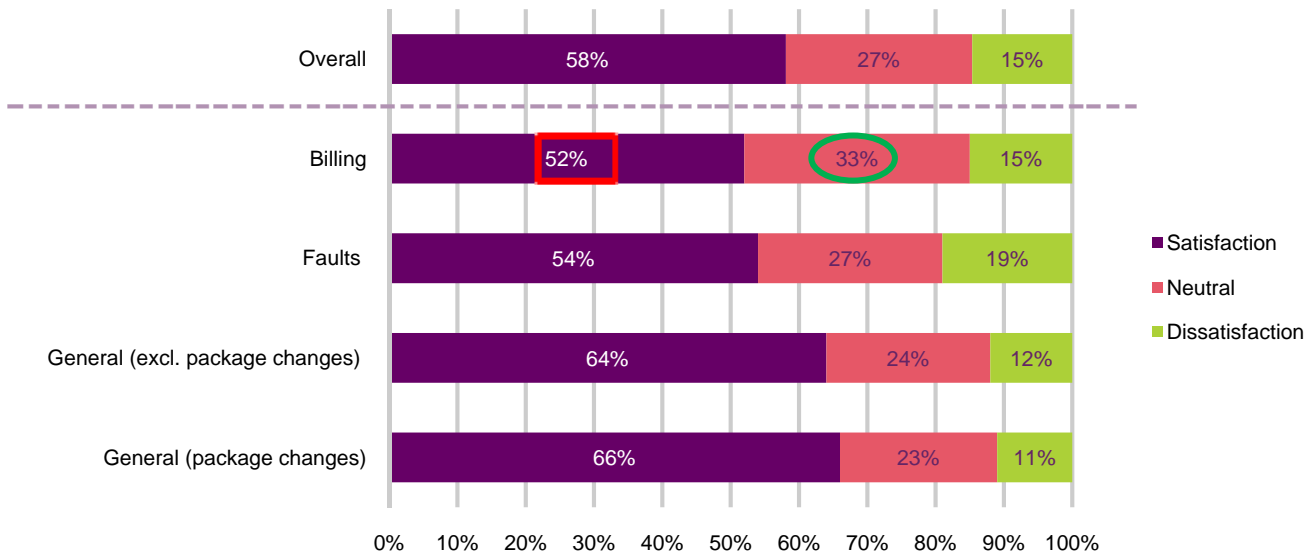
○ / □ Indicates significantly higher/ lower than overall (99% test).

Source: Online Survey

Satisfaction with customer service, by issue type

Figure 2.10 (below) shows the level of satisfaction with customer service from landline providers by type of issue.

Figure 2.10: Landline - Satisfaction with customer service by issue type



Q: Overall, how satisfied are you with the service you received from [PROVIDER] customer services on this occasion? Please give your rating on a scale of 1 to 10, where 10 means that you are extremely satisfied and 1 means you are extremely dissatisfied.

Base: All UK households contacting providers (Billing: 623/ Faults: 293/ General excl: 302/ Pack changes: 119).

 / Indicates significantly higher/ lower than overall (99% test).

Source: Online survey

Satisfaction with contacting customer service



Figure 2.11 (below) shows mean satisfaction scores on various aspects of contacting customer service.

Figure 2.11: Landline – Overall satisfaction with contacting customer service

	BT	Sky	Talk Talk	Virgin
Ease of finding provider contact details	6.6	7.2	6.8	7.3
Ease of using any automated call routing system (phone only)	5.5	6.3	5.9	6.3
Offering to call you back	5.4	5.8	5.2	5.3
Calling you back when they said they would	5.7	6.0	5.6	6.0
The cost of calling or contacting customer services	6.5	6.5	6.7	6.8
Ease of getting through to the right person (phone only)	5.4	6.1	5.6	6.2

Q: Overall how satisfied are you with [PROVIDER] as your provider of [service] on a 1 to 10 scale?

Base: All UK households contacting provider (BT: 617/ Sky: 207/ TalkTalk/AOL: 211/ Virgin: 302).

 /  Indicates significantly higher/ lower than overall (99% test). NB All other differences are not statistically significant.

Source: Online Survey

Satisfaction with speed of customer service



Figure 2.12 (below) shows mean satisfaction scores on various aspects to do with the speed of customer service.

Figure 2.12: Landline – Overall satisfaction with the speed of customer service

	BT	Sky	Talk Talk	Virgin
Speed of answering phones (phone only)	5.7	6.1	5.8	6.2
Speed of replying to emails (email only)	6.1	7.6	6.4	7.1
The time taken to handle issue	5.9	6.4	5.8	6.5

Q: Overall how satisfied are you with [PROVIDER] as your provider of [service] on a 1 to 10 scale?

Base: All UK households contacting provider (BT: 617/ Sky: 207/ TalkTalk/AOL: 211/ Virgin: 302).




 /  Indicates significantly higher/ lower than overall (99% test). All other differences are not statistically significant.

Source: Online Survey

Satisfaction with advice from customer service



Figure 2.13 (below) shows mean satisfaction scores for the standard of advice from customer service.

Figure 2.13: Landline – Overall satisfaction with the standard of advice from customer service

	BT	Sky	Talk Talk	Virgin
Advice/information was easy to understand	6.2	 7.1	6.3	6.7
Advice/information was useful	6.1	 6.9	6.1	6.5
Getting the issue resolved to your satisfaction	6.1	 6.8	5.9	6.6

Q: Overall how satisfied are you with [PROVIDER] as your provider of [service] on a 1 to 10 scale?

Base: All UK households contacting provider (BT: 617/ Sky: 207/ TalkTalk/AOL: 211/ Virgin: 302).

 /  Indicates significantly higher/ lower than overall (99% test). NB All other differences are not statistically significant.

Source: Online Survey

Satisfaction with customer service adviser



Figure 2.14 (below) shows mean satisfaction with the customer service adviser.

Figure 2.14: Landline – Overall satisfaction with the adviser of customer service

	BT	Sky	Talk Talk	Virgin
Courtesy and politeness of advisers	6.9	7.6	7.0	7.1
Adviser ability to understand the issue and identify the problem	6.3	6.8	6.1	6.8
Adviser took my questions/issue seriously	6.6	7.5	6.6	7.1
Keeping you informed throughout the process	6.2	6.8	6.1	6.9
Adviser doing what they say they would do	6.3	7.0	6.4	7.0
Logging of query details to avoid having to repeat yourself	5.8	6.3	5.8	6.4

Q: Overall how satisfied are you with [PROVIDER] as your provider of [service] on a 1 to 10 scale?

Base: All UK households contacting provider (BT: 617/ Sky: 207/ TalkTalk/AOL: 211/ Virgin: 302).

 /  Indicates significantly higher/ lower than overall (99% test). NB All other differences are not statistically significant.

Source: Online Survey

Satisfaction with customer service generally



Figure 2.15 (below) shows mean satisfaction scores for more general customer service attributes.

Figure 2.15: Landline – Overall satisfaction generally with customer service

	BT	Sky	Talk Talk	Virgin
Offering compensation or a goodwill payment	4.3	5.1	4.6	5.4
Willingness to help resolve your issue	6.4	7.0	6.5	7.0

Q: Overall how satisfied are you with [PROVIDER] as your provider of [service] on a 1 to 10 scale?

Base: All UK households contacting provider (BT: 617 / Sky: 207 / TalkTalk/AOL: 211 / Virgin: 302).

 /  Indicates significantly higher/ lower than overall (99% test). All other differences are not statistically significant.

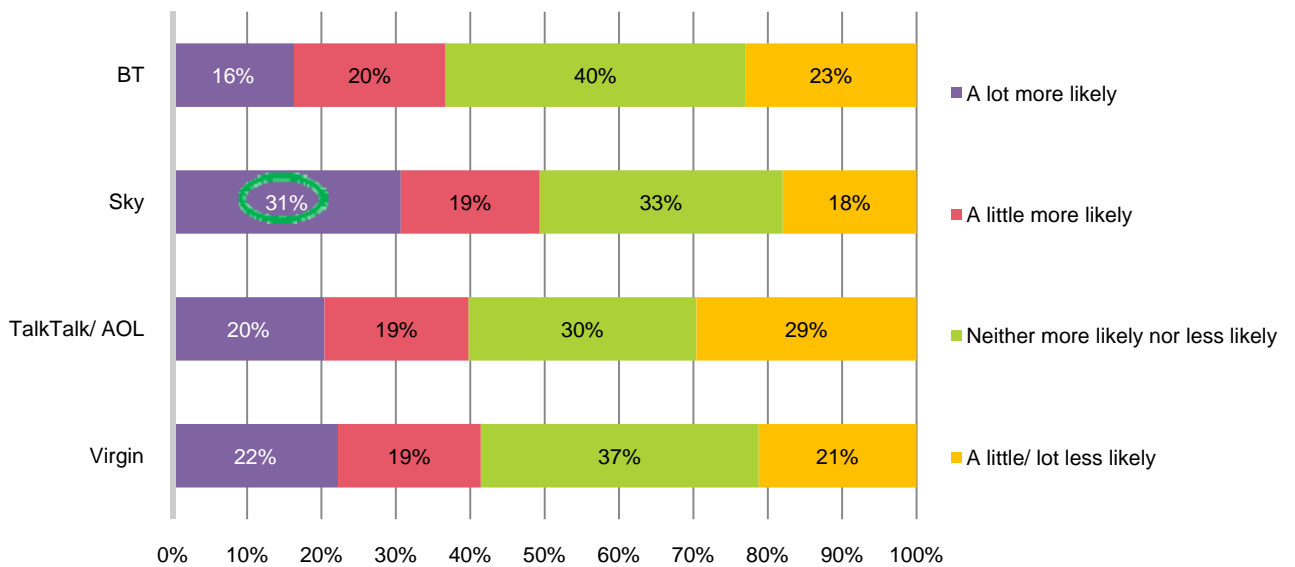
Source: Online Survey

Future use of provider given customer service experience

Figure 2.16 (below) shows the likelihood of using each landline provider in the future, in light of the customer service experience during the most recent contact.

It must be noted that in this type of questioning customers tend to overstate intention to act and in reality actions are likely to be lower.

Figure 2.16: Landline – Future use of provider given customer experience



Q: Has the experience of [PROVIDER]'s customer service for this issue made you more likely or less likely to use [PROVIDER] in the future?

Base: All UK households contacting provider (BT: 617/ Sky: 207/ TalkTalk/AOL: 211/ Virgin: 302).

○ / □ Indicates significantly higher/ lower than overall (99% test). NB All other differences are not statistically significant.

Source: Online survey

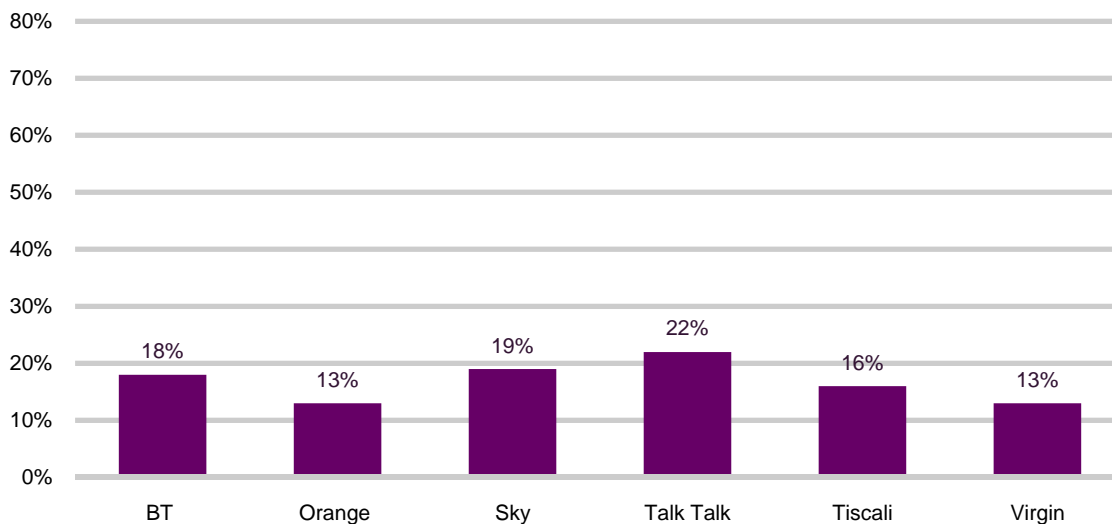
Broadband Sector Charts

The following charts look specifically at the broadband sector, in terms of service providers contacted by customers within our sample, types of issues calling about, type of contact used, level of issue resolution, number of contacts required, and satisfaction with the service.

Customer's recent contact with provider



Figure 3.1 (below) shows the proportion of customers of different broadband providers who had contacted that provider in the last three months. Levels of contact were only a little above those for landline providers.

Figure 3.1: Broadband – Proportion of customers who have contacted their broadband provider about an issue in the last three months



Q: Thinking of [PROVIDER] and the services you buy from them, have you contacted them in the last 3 months by phone/ email?

Base: All UK households using providers (BT: 818/ Orange: 90/ Sky: 322/ Talk Talk: 295/ Tiscali: 114/ Virgin: 408).

 /  Indicates significantly higher/ lower than overall (99% test).

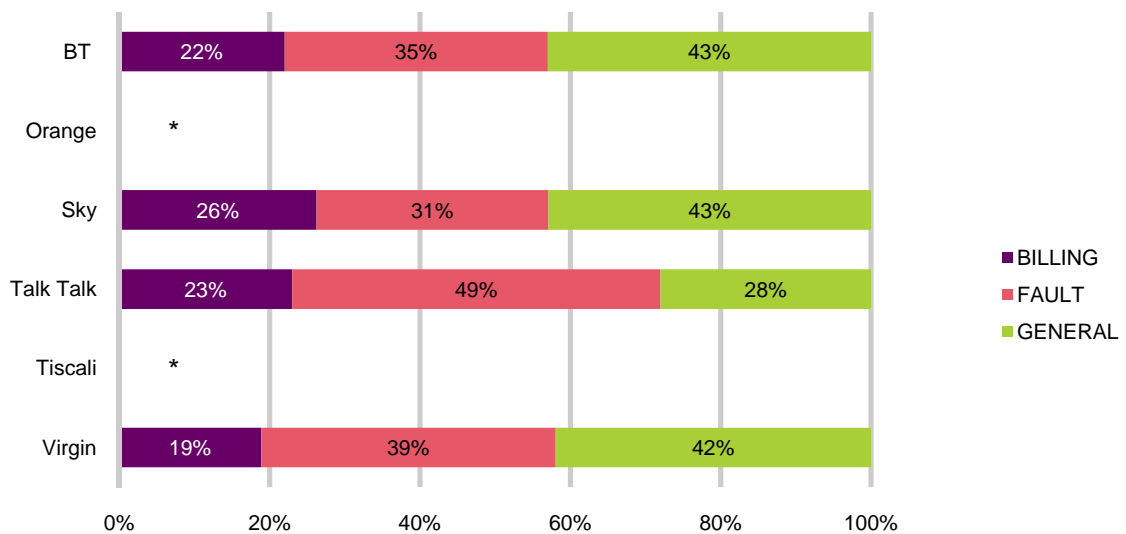
Source: GfK Omnibus Survey

Type of call made most recently with broadband provider

Figure 3.2 (below) shows the type of call made to broadband providers.

Figure 3.2: Broadband – Type of call made most recently with broadband provider

These issues are classified on the basis of what customers indicated when questioned and therefore subject to interpretation. They may not necessarily be reflective of the actual contacts received by the respective providers over the specified period.



Q: Thinking of the most recent issue you had to contact [PROVIDER] about, which of the following categories did the issue fall into?

Base: All UK households contacting provider (BT: 225/ Orange: 12*/ Sky: 71**/ Talk Talk: 69**/ Tiscali: 20*/ Virgin: 87).

○ / □ Indicates significantly higher/ lower than overall (99% test).

* Indicates a base size lower than 50

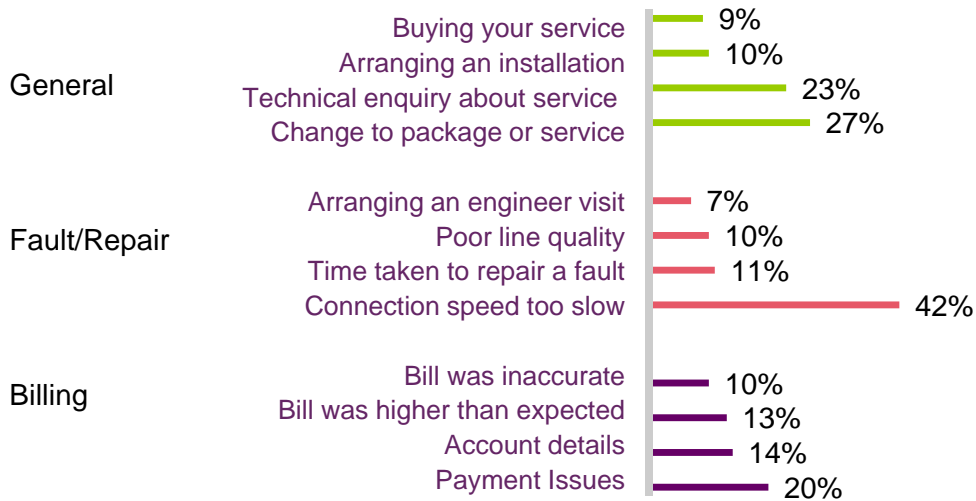
** Caution: Low base, results should be treated as indicative only.

Source: GfK Omnibus Survey

Key issues by contact type

Figure 3.3 (below) shows – for each of the three main types of issue – the most common specific reasons for recent contact with broadband service providers.

Figure 3.3: Broadband - Top four issues per contact type



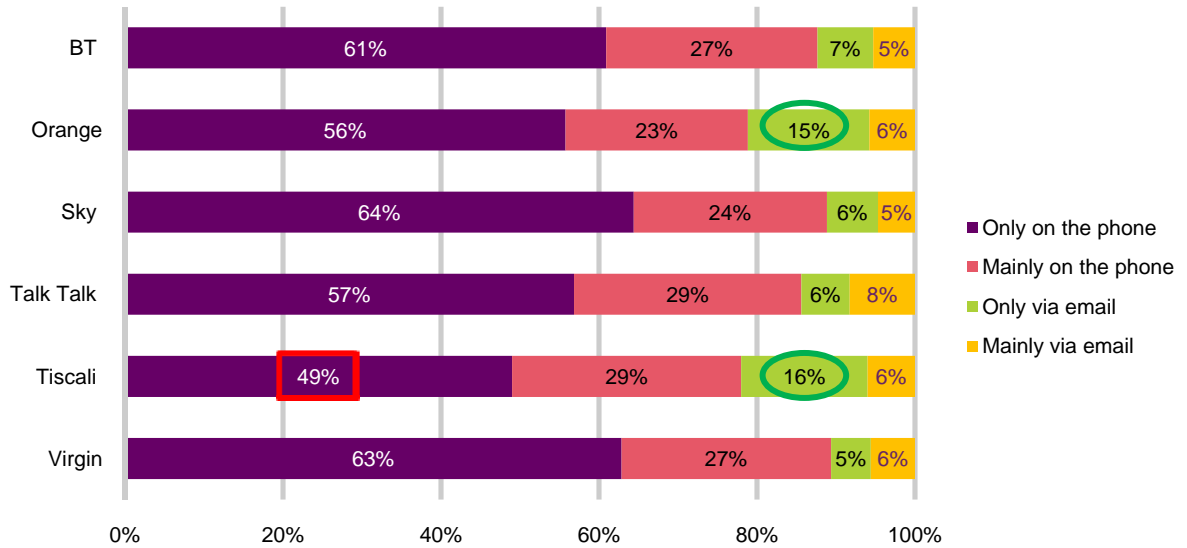
Q: Which of the following best describes what the issue with [PROVIDER] was concerning?
 Base: All UK households contacting provider (Billing: 591/ Fault: 768/ General: 598).

Source: Online survey

Type of contact made most recently with broadband provider

Figure 3.4 (below) shows the way in which customers contacted their broadband providers.

Figure 3.4: Broadband – Type of contact made most recently with broadband provider



Q: Thinking of the most recent issue you had to contact [PROVIDER] about, did you contact them only on the phone, mainly on the phone, only via email or mainly via email?

Base: All UK households contacting provider (BT: 379/ Orange: 156/ Sky: 341/ TalkTalk: 360/ Tiscali: 159/ Virgin: 562).

○ / □ Indicates significantly higher/ lower than overall (99% test).

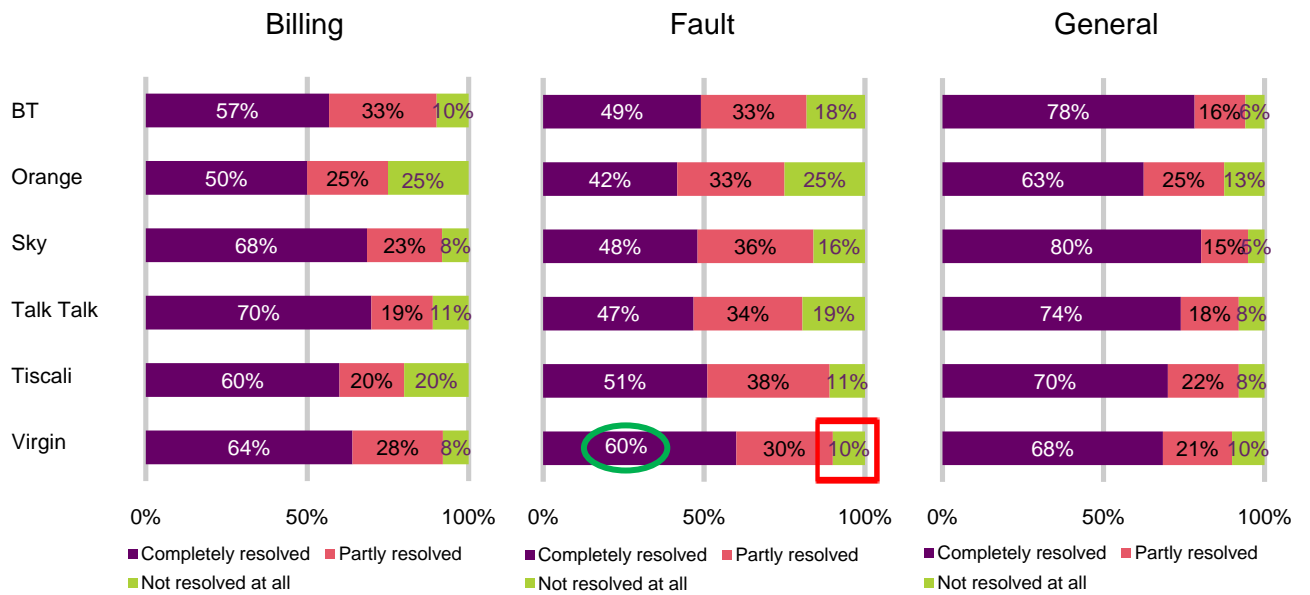
Source: Online Survey

Issue resolution by broadband provider

Figure 3.5 (below) shows the degree of issue resolution by broadband providers.

Figure 3.5: Broadband – Whether issue is seen as ‘resolved’

NB The resolution of these contacts are classified on the basis of what customers indicated when questioned and therefore subject to interpretation. They may not necessarily be reflective of the actual contacts received by the respective providers over the specified period.



Q: In your opinion, was [PROVIDER] able to successfully resolve your issue [billing/ faults/ general enquiries]?
 Base: All UK households contacting provider (BT:121/154/104; Orange: 50/56/50; Sky:90/137/114; TalkTalk:102/147/111; Tiscali:53/56/50; Virgin: 175/218/164).

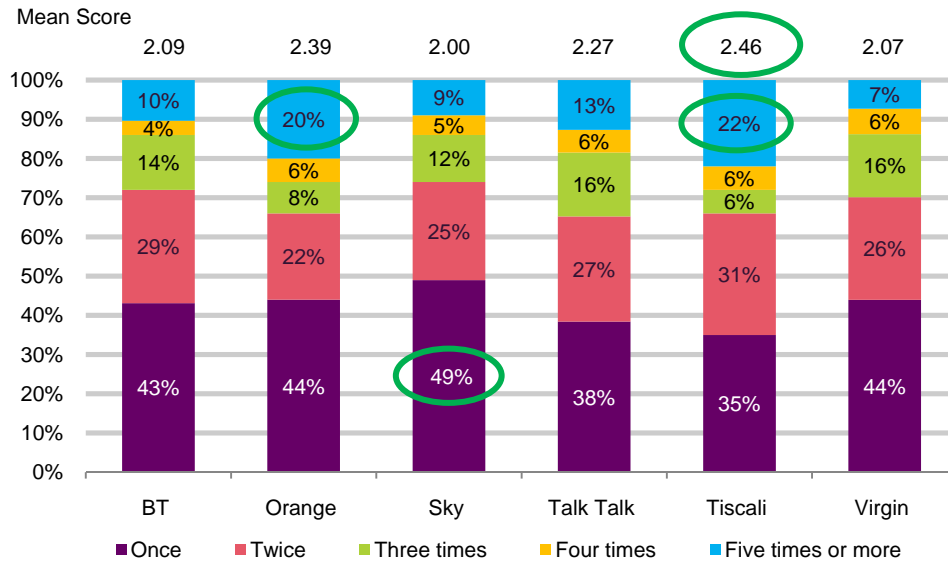
○ / □ Indicates significantly higher/ lower than overall (99% test).

Source: Online Survey

Number of contacts made to service provider

Figure 3.6 (below) shows the number of times customers contacted their broadband provider regarding their most recent issue.

Figure 3.6: Broadband – Number of contacts made, by provider



Q: How many times have you been in contact with [PROVIDER] in relation to this particular issue so far?
 Base: All UK households contacting provider (BT:379/ Orange:156/ Sky:341/ TalkTalk:360/ Tiscali:159/ Virgin:562)

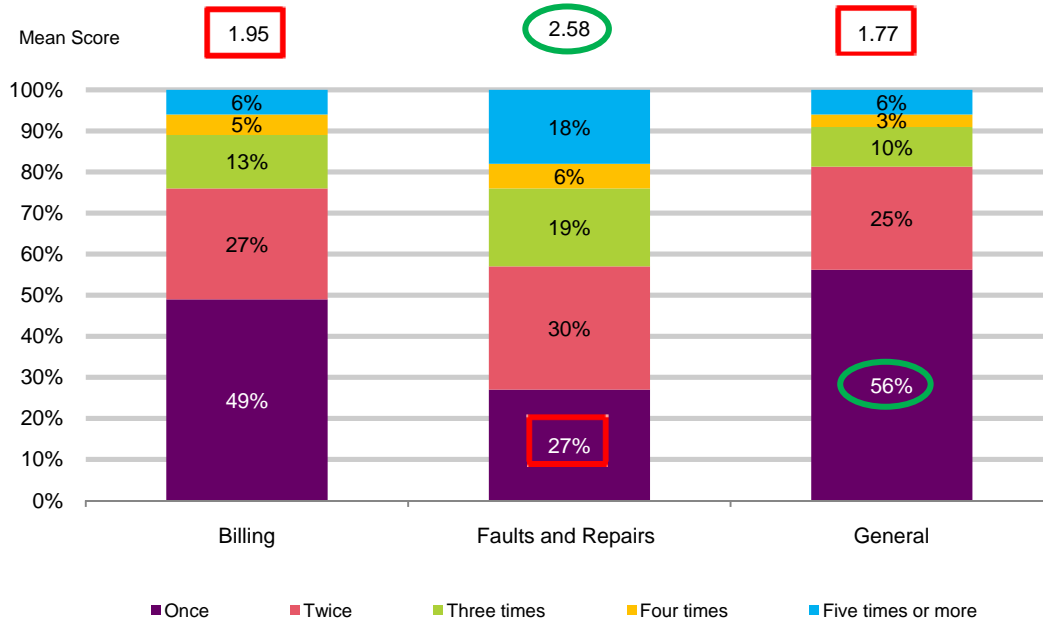
○ / □ Indicates significantly higher/ lower than overall (99% test).

Source: Online Survey

Number of contacts made, by issue type

Figure 3.7 (below) shows – for each of the three issue types – the number of contacts required with the broadband provider in order to try to resolve the issue.

Figure 3.7: Broadband – Number of contacts made, by issue type



Q: How many times have you been in contact with [PROVIDER] in relation to this particular issue so far?
 Base: All UK households contacting provider (Billing:591/ Faults:768/ General:598).

○ / □ Indicates significantly higher/ lower than overall (99% test).

Source: Online survey

Overall satisfaction by provider

Figure 3.8 (below) shows levels of overall satisfaction with broadband providers.

Figure 3.8: Broadband – Overall satisfaction by provider



Q: Overall how satisfied are you with [PROVIDER] as your provider of [service] on a 1 to 10 scale?

Base: All UK households contacting provider (BT: 379/ Orange: 156/ Sky: 341/ TalkTalk: 360/ Tiscali: 159/ Virgin: 562).

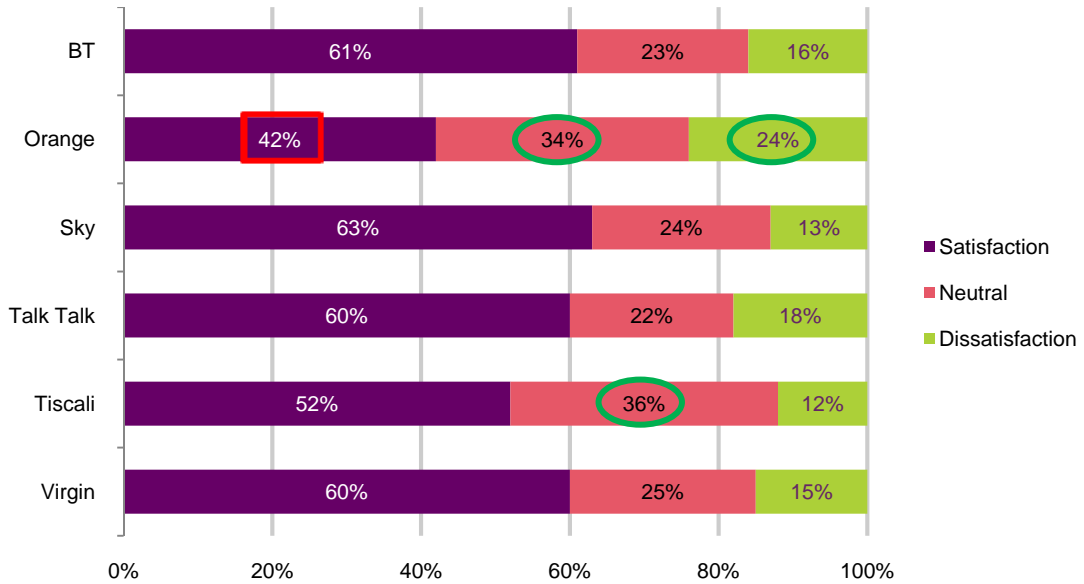
○ / □ Indicates significantly higher/ lower than overall (99% test).

Source: Online Survey

Satisfaction with customer service by provider

Figure 3.9 (below) shows levels of satisfaction with the customer service of broadband providers.

Figure 3.9: Broadband – Overall satisfaction by provider



Q: Overall how satisfied are you with [PROVIDER] as your provider of [service] on a 1 to 10 scale?

Base: All UK households contacting provider (BT: 379/ Orange: 156/ Sky: 341/ TalkTalk: 360/ Tiscali: 159/ Virgin: 562).

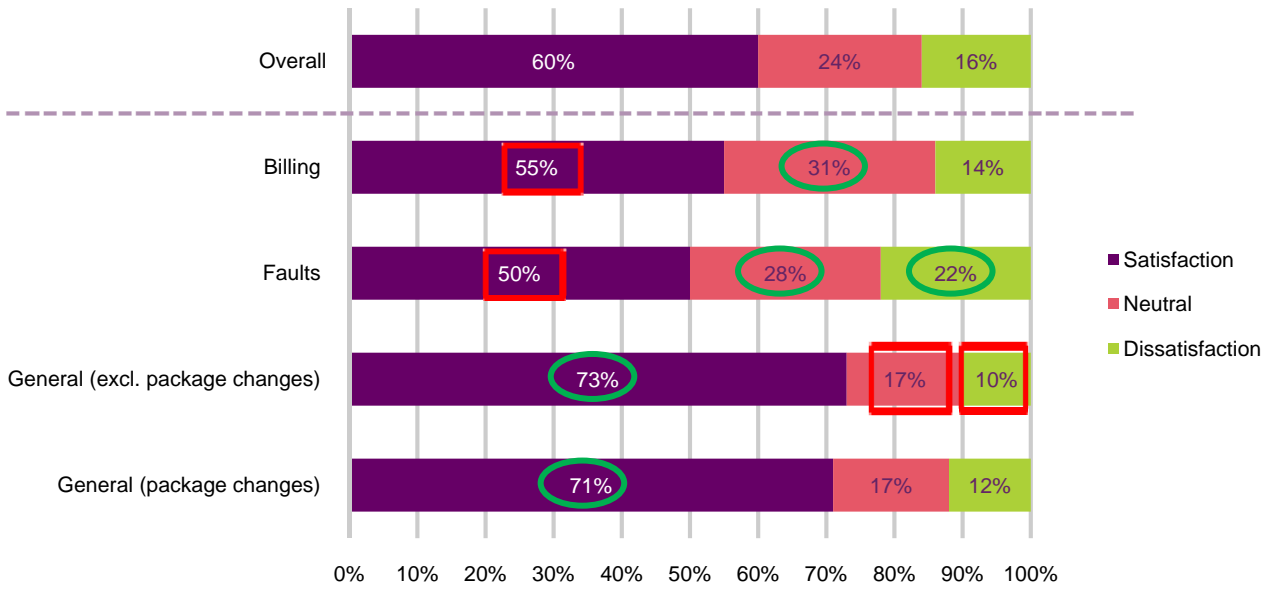
○ / □ Indicates significantly higher/ lower than overall (99% test).

Source: Online Survey

Satisfaction with customer service, by issue type

Figure 3.10 (below) shows the level of satisfaction with customer service from broadband providers by type of issue.

Figure 3.10: Broadband - Satisfaction with customer service by issue type



Q: Overall, how satisfied are you with the service you received from [PROVIDER] customer services on this occasion? Please give your rating on a scale of 1 to 10, where 10 means that you are extremely satisfied and 1 means you are extremely dissatisfied.

Base: All UK households contacting providers (Billing:591/ Faults:768/ General excl: 443/ Pack changes: 155).

○ / □ Indicates significantly higher/ lower than overall (99% test).

Source: Online survey

Overall satisfaction with contacting customer service



Figure 3.11 (below) shows mean satisfaction scores on various aspects of contacting customer service.

Figure 3.11: Broadband – Overall satisfaction with contacting customer service

	BT	Orange	Sky	Talk Talk	Tiscali	Virgin (F)
Ease of finding provider contact details	6.5	5.7	6.7	6.5	5.9	7.2
Ease of using any automated call routing system (phone only)	5.4	4.9	6.0	5.9	5.3	6.1
Offering to call you back	5.7	4.4	5.4	5.3	4.9	5.2
Calling you back when they said they would	6.0	4.6	5.9	5.9	5.3	5.7
The cost of calling or contacting customer services	6.7	4.7	6.0	6.5	4.3	6.7
Ease of getting through to the right person (phone only)	5.2	4.6	6.0	5.7	5.2	6.0

Q: Overall how satisfied are you with [PROVIDER] as your provider of [service] on a 1 to 10 scale?

Base: All UK households contacting provider (BT: 379/ Orange: 156/ Sky: 341/ TalkTalk: 360/ Tiscali: 159/ Virgin: 562).

 /  Indicates significantly higher/ lower than overall (99% test).

Source: Online Survey

Overall satisfaction with speed of customer service



Figure 3.12 (below) shows mean satisfaction scores on various aspects to do with the speed of customer service.

Figure 3.12: Broadband – Overall satisfaction with the speed of customer service

	BT	Orange	Sky	Talk Talk	Tiscali	Virgin
Speed of answering phones (phone only)	5.7	5.0	5.8	5.8	5.2	5.9
Speed of replying to emails (email only)	6.6	5.5	7.4	6.5	6.3	6.8
The time taken to handle issue	5.9	4.9	6.2	5.9	5.4	6.2

Q: Overall how satisfied are you with [PROVIDER] as your provider of [service] on a 1 to 10 scale?

Base: All UK households contacting provider (BT: 379/ Orange: 156/ Sky: 341/ TalkTalk: 360/ Tiscali: 159/ Virgin: 562).

 /  Indicates significantly higher/ lower than overall (99% test).

Source: Online Survey

Overall satisfaction with advice from customer service



Figure 3.13 (below) shows mean satisfaction scores for the standard of advice from customer service.

Figure 3.13: Broadband – Overall satisfaction with the standard of advice from customer service

	BT	Orange	Sky	Talk Talk	Tiscali	Virgin
Advice/information was easy to understand	6.4	5.7	6.7	6.3	6.0	6.6
Advice/information was useful	6.2	5.5	6.6	6.2	5.8	6.4
Getting the issue resolved to your satisfaction	6.3	5.4	6.4	6.1	5.7	6.4

Q: Overall how satisfied are you with [PROVIDER] as your provider of [service] on a 1 to 10 scale?

Base: All UK households contacting provider (BT: 379/ Orange: 156/ Sky: 341/ TalkTalk: 360/ Tiscali: 159/ Virgin: 562).

 /  Indicates significantly higher/ lower than overall (99% test).

Source: Online Survey

Overall satisfaction with customer service adviser



Figure 3.14 (below) shows mean satisfaction with the customer service adviser.

Figure 3.14: Broadband – Overall satisfaction with the adviser of customer service

	BT	Orange	Sky	Talk Talk	Tiscali	Virgin
Courtesy and politeness of advisers	7.3	6.7	7.3	7.2	6.9	7.2
Adviser ability to understand the issue and identify the problem	6.3	5.6	6.7	6.2	5.9	6.6
Adviser took my questions/issue seriously	6.9	6.2	7.0	6.7	6.3	6.9
Keeping you informed throughout the process	6.5	5.3	6.6	6.3 (B)	5.9	6.5
Adviser doing what they say they would do	6.6	5.7	6.7	6.5	6.1	6.7
Logging of query details to avoid having to repeat yourself	5.7	5.2	6.3	5.7	5.4	6.1

Q: Overall how satisfied are you with [PROVIDER] as your provider of [service] on a 1 to 10 scale?

Base: All UK households contacting provider (BT: 379/ Orange: 156/ Sky: 341/ TalkTalk: 360/ Tiscali: 159/ Virgin: 562).

 /  Indicates significantly higher/ lower than overall (99% test).

Source: Online Survey

Overall satisfaction with customer service generally



Figure 3.15 (below) shows mean satisfaction scores for more general customer service attributes.

Figure 3.15: Broadband – Overall satisfaction generally with customer service

	BT	Orange	Sky	Talk Talk	Tiscali	Virgin
Offering compensation or a goodwill payment	4.2	3.4	4.9	4.4	3.4	4.8
Willingness to help resolve your issue	6.8	5.9	6.8	6.6	6.2	6.7

Q: Overall how satisfied are you with [PROVIDER] as your provider of [service] on a 1 to 10 scale?

Base: All UK households contacting provider (BT: 379/ Orange: 156/ Sky: 341/ TalkTalk: 360/ Tiscali: 159/ Virgin: 562).

 /  Indicates significantly higher/ lower than overall (99% test).

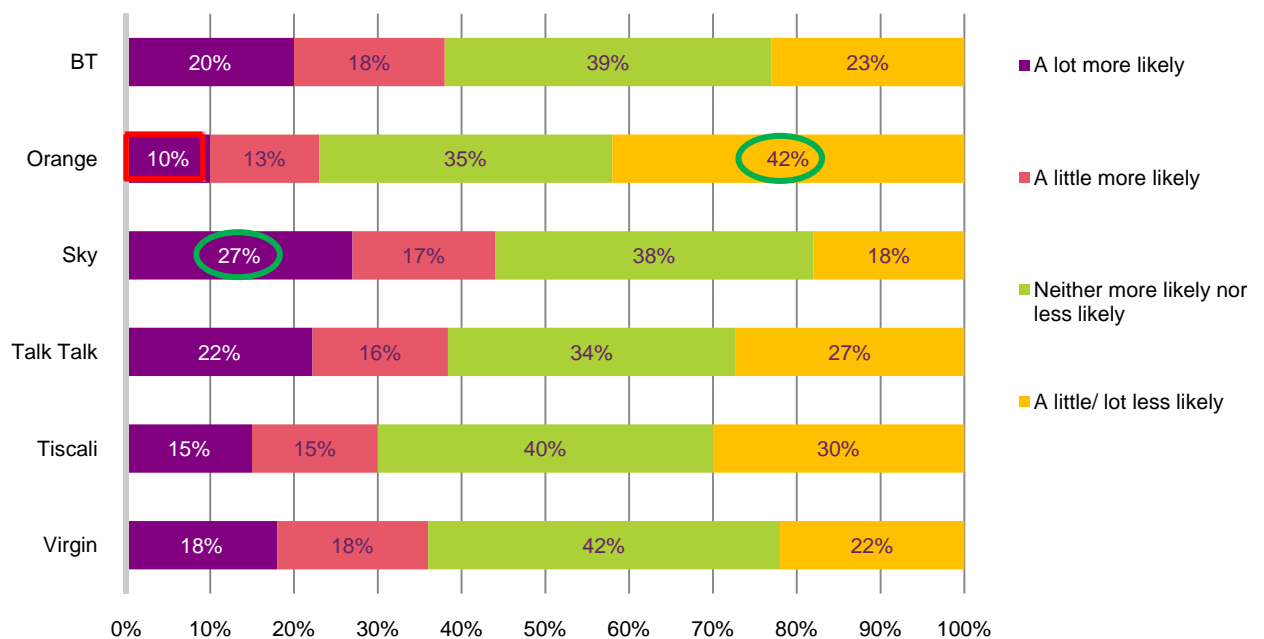
Source: Online Survey

Future use of provider given customer service experience

Figure 3.16 (below) shows the likelihood of using each broadband provider in the future, in light of the customer service experience during the most recent contact.

Figure 3.16: Broadband – Future use of provider given customer service experience

It is important to note in this type of questioning that customers tend to overstate



Q: Has the experience of [PROVIDER]'s customer service for this issue made you more likely or less likely to use [PROVIDER] in the future?

Base: All UK households contacting provider (BT: 379/ Orange: 156/ Sky: 341/ TalkTalk: 360/ Tiscali: 159/ Virgin: 562).

○/□ indicates significantly higher/ lower than overall (99% test).

Source: Online survey

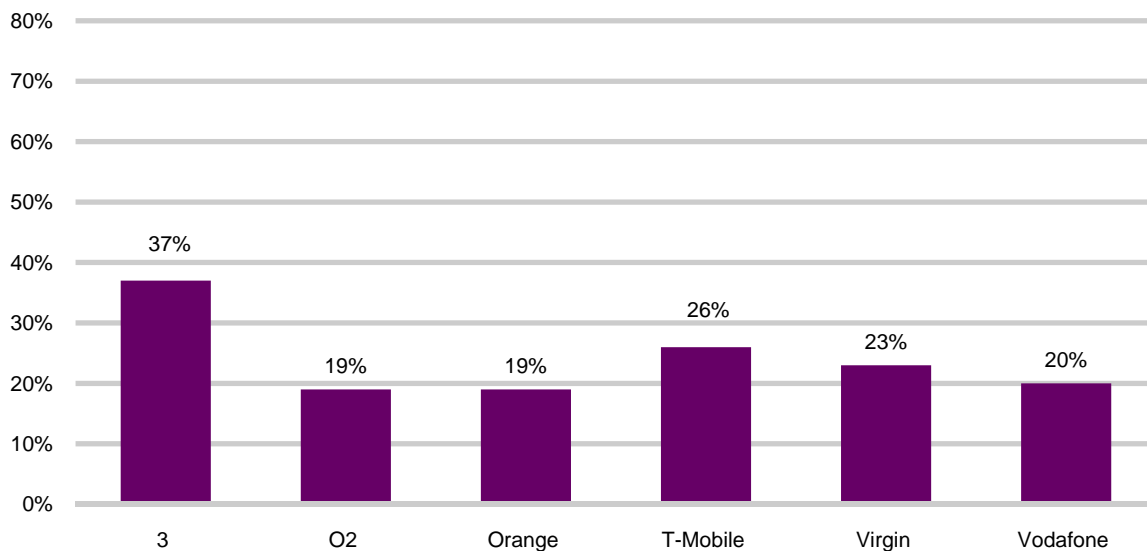
Mobile Phone Sector Charts

The following charts look specifically at the mobile phone sector, in terms of service providers contacted, types of issues calling about, type of contact used, level of issue resolution, number of contacts required, and satisfaction with the service.

Recent contact with provider



Figure 4.1 (below) shows the proportion of customers of different mobile phone providers who had contacted that provider in the last three months.

Figure 4.1: Mobile – Proportion of customers who have contacted their mobile provider about an issue in the last three months



Q: Thinking of [PROVIDER] and the services you buy from them, have you contacted them in the last 3 months by phone/ email?

Base: All UK households using providers (3: 135/ O2: 605/ Orange: 567/ T-Mobile: 366/ Virgin: 153/ Vodafone: 474).

 /  Indicates significantly higher/ lower than overall (99% test).

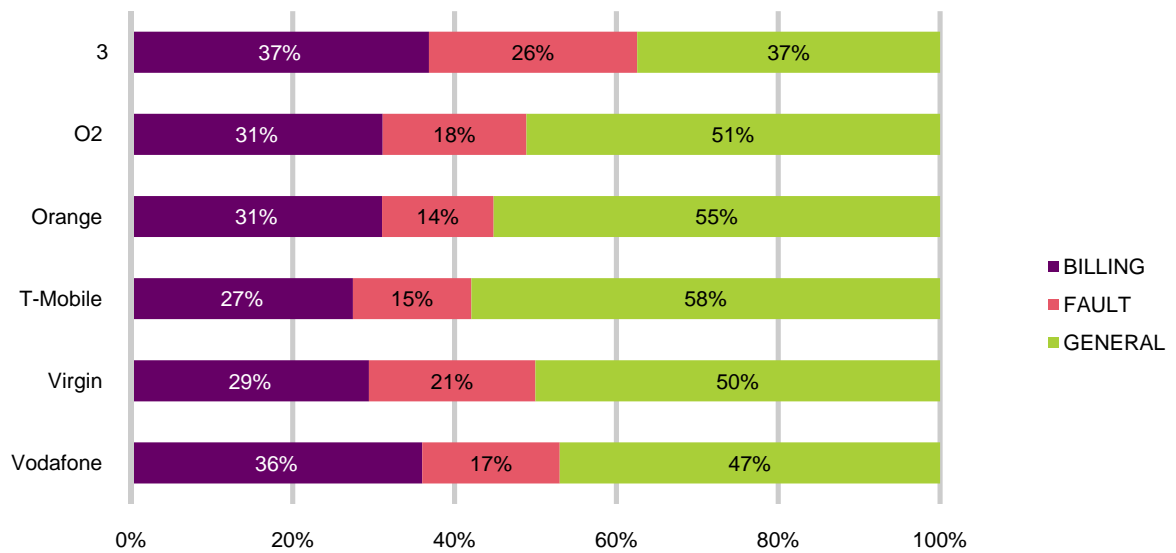
Source: GfK Omnibus Survey

Type of call made most recently to mobile provider

Figure 4.2 (below) shows the type of call made to mobile phone providers.

Figure 4.2: Mobile – Type of call made most recently with mobile provider

NB These contacts are classified on the basis of what customers indicated when questioned and therefore subject to interpretation. They may not necessarily be reflective of the actual calls received by the respective providers over the specified period.



Q: Thinking of the most recent issue you had to contact [PROVIDER] about, which of the following categories did the issue fall into?

Base: All UK households contacting provider (3: 52**/ O2: 116/ Orange: 111/ T-Mobile: 101/ Virgin: 76/ Vodafone: 111).

○ / □ Indicates significantly higher/ lower than overall (99% test).

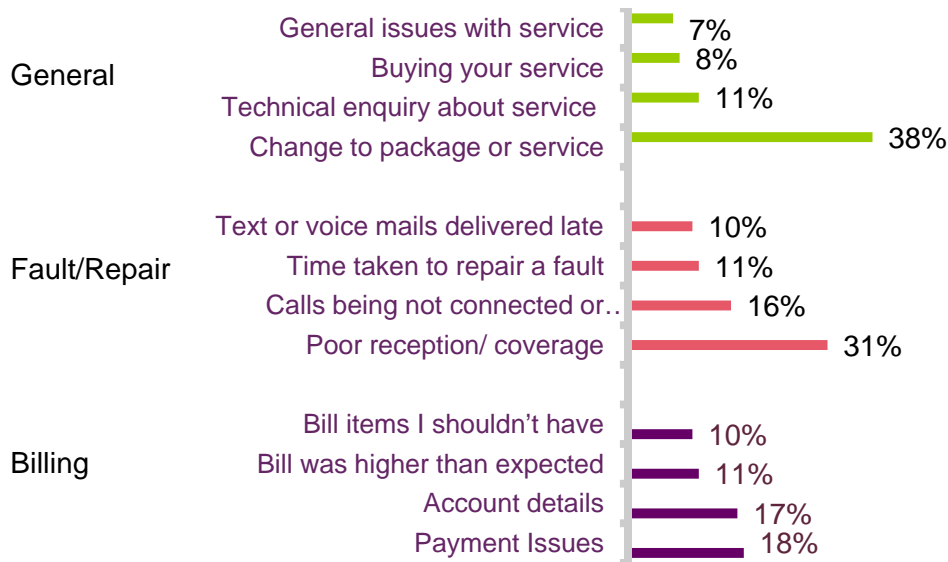
** Caution: Low base, results should be treated as indicative only.

Source: GfK Omnibus Survey

Key issues by contact type

Figure 4.3 (below) shows – for each of the three main types of issue – the most common specific reasons for recent contact with mobile phone service providers.

Figure 4.3: Mobile phone - Top four issues per contact type



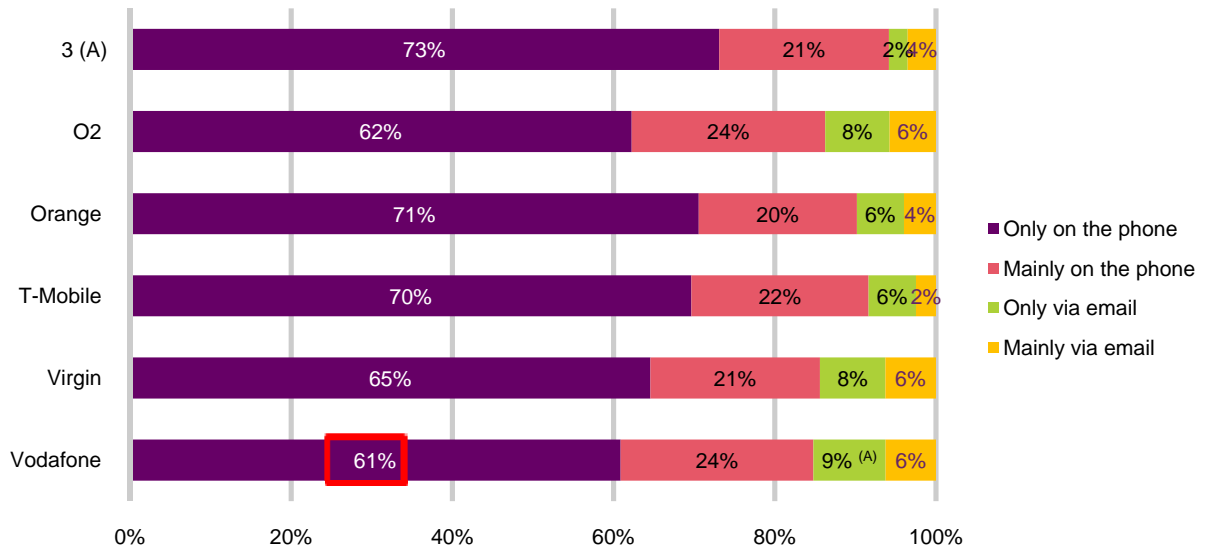
Q: Which of the following best describes what the issue with [PROVIDER] was concerning?
 Base: All UK households contacting provider (Billing: 734/ Fault: 499/ General: 693).

Source: Online survey

Type of contact made most recently with mobile provider

Figure 4.4 (below) shows the way in which customers contacted their mobile phone providers. As with other sectors, the most common method was by telephone only.

Figure 4.4: Mobile – Type of contact made most recently with mobile provider



Q: Thinking of the most recent issue you had to contact [PROVIDER] about, did you contact them only on the phone, mainly on the phone, only via email or mainly via email?

Base: All UK households contacting provider (3: 179/ O2: 479/ Orange: 409/ T-Mobile: 310 / Virgin: 167 / Vodafone: 382).

○ / □ Indicates significantly higher/ lower than overall (99% test).

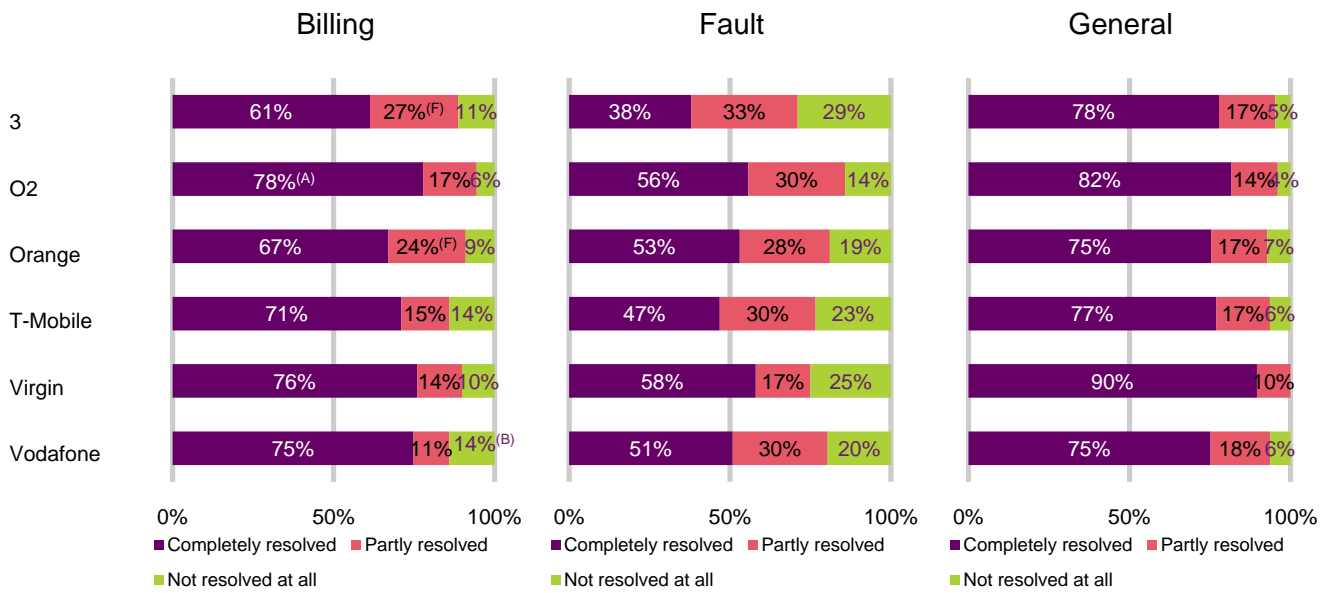
Source: Online Survey

Issue resolution by mobile provider

Figure 4.5 (below) shows the degree of issue resolution by mobile phone providers.

Figure 4.5: Mobile – Whether issue is seen as ‘resolved’

The resolution of these contacts are classified on the basis of what customers indicated when questioned and therefore subject to interpretation. They may not necessarily be reflective of the actual contacts received by the respective providers over the specified period.



Q: In your opinion, was [PROVIDER] able to successfully resolve your issue [billing/ faults/ general enquiries]?
 Base: All UK households contacting provider (Billing/ Fault/ General) (3:62/58/59**; O2:186/102/191; Orange:171/100/138; T-Mobile:101/99/110; Virgin:57/51/69**; Vodafone:157/99/126)).

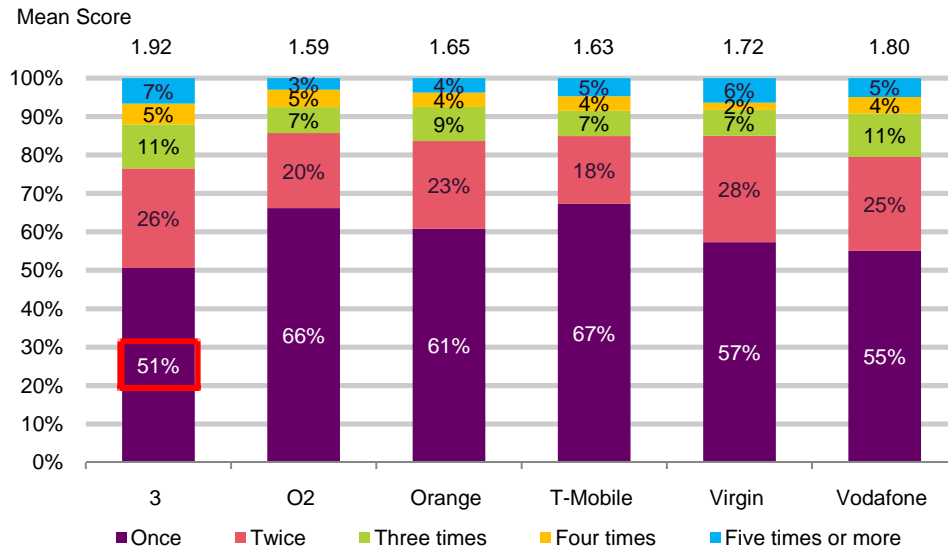
○ / □ Indicates significantly higher/ lower than overall (99% test).
 ** Caution: Low base, results should be treated as indicative only.

Source: Online Survey

Number of contacts made with service provider

Figure 4.6 (below) shows the number of times customers contacted their mobile phone provider regarding their most recent issue.

Figure 4.6: Mobile – Number of contacts made, by provider



Q: How many times have you been in contact with [PROVIDER] in relation to this particular issue so far?
 Base: All UK households contacting provider (3:179/ O2:479/ Orange:409/ T-Mobile:310/ Virgin:167/ Vodafone:382)

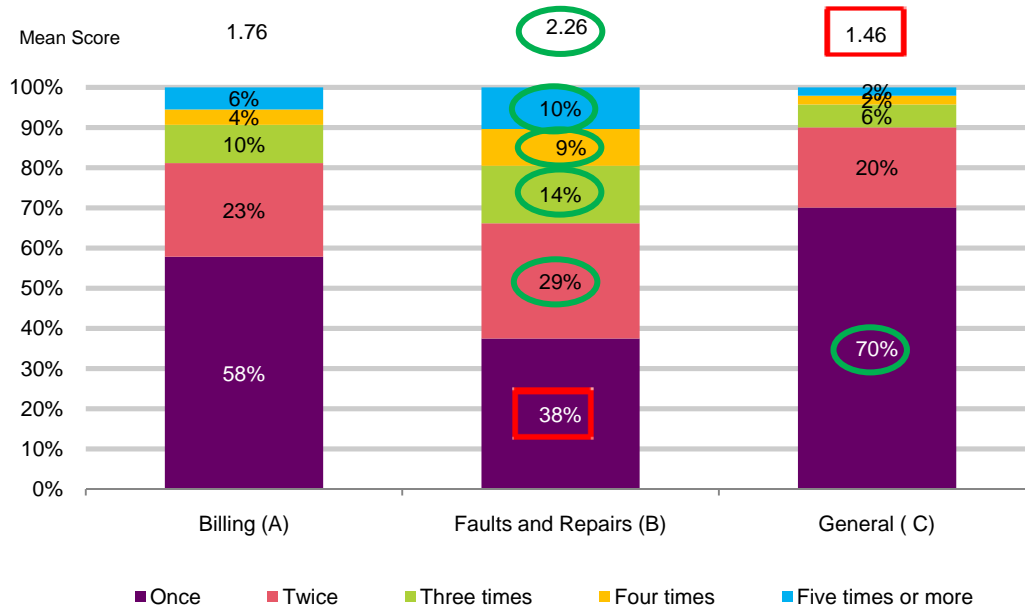
○ / □ Indicates significantly higher/ lower than overall (99% test).

Source: Online Survey

Number of contacts made, by issue type

Figure 4.7 (below) shows – for each of the three issue types – the number of contacts required with the mobile phone service provider in order to try to resolve the issue.

Figure 4.7: Mobile phone – Number of contacts made, by issue type



Q: How many times have you been in contact with [PROVIDER] in relation to this particular issue so far?
 Base: All UK households contacting provider (Billing:734/ Faults:499/ General:693).

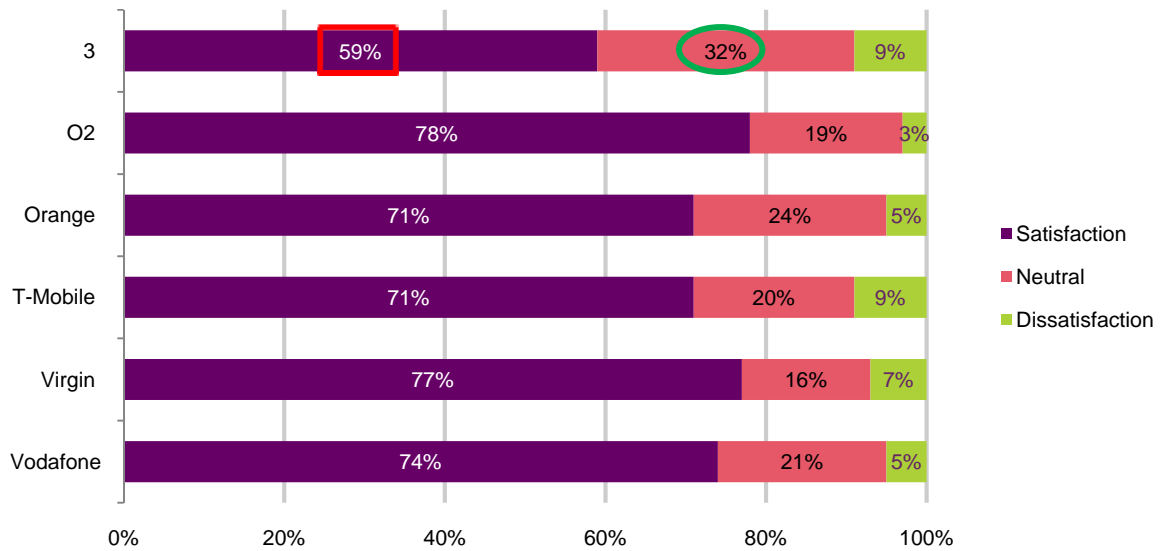
○ / □ Indicates significantly higher/ lower than overall (99% test).

Source: Online survey

Overall satisfaction by provider

Figure 4.8 (below) shows levels of overall satisfaction with mobile phone providers.

Figure 4.8: Mobile – Overall satisfaction by provider



Q: Overall how satisfied are you with [PROVIDER] as your provider of [service] on a 1 to 10 scale?

Base: All UK households contacting provider (3: 179/ O2: 479/ Orange: 409/ T-Mobile: 310/ Virgin: 167/ Vodafone: 382).

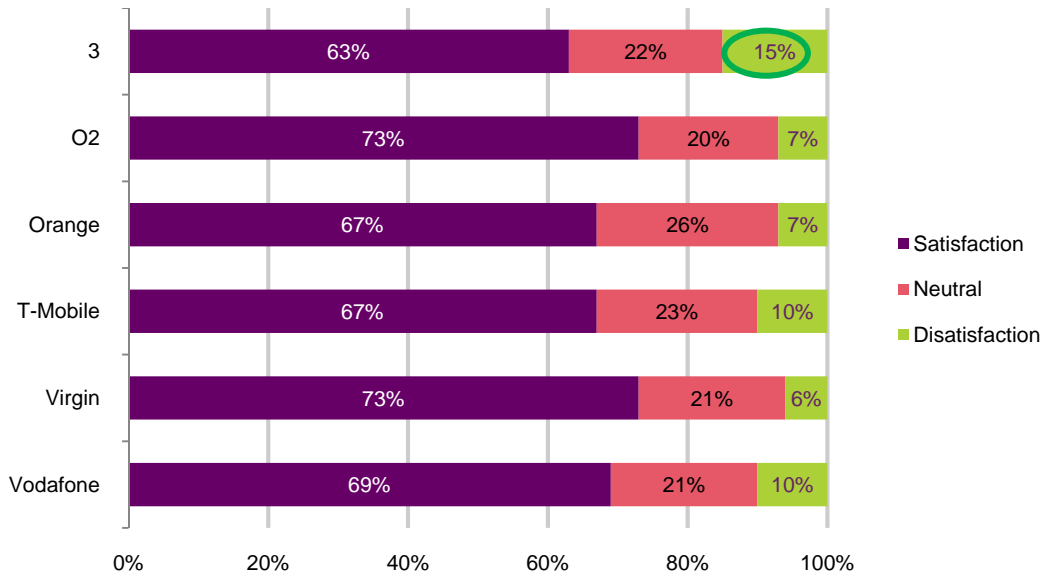
○ / □ Indicates significantly higher/ lower than overall (99% test).

Source: Online Survey

Satisfaction with customer service by provider

Figure 4.9 (below) shows levels of satisfaction with the customer service of mobile phone providers.

Figure 4.9: Mobile – Satisfaction with customer service by provider



Q: Overall how satisfied are you with [PROVIDER] as your provider of [service] on a 1 to 10 scale?

Base: All UK households contacting provider (3: 179/ O2: 479/ Orange: 409/ T-Mobile: 310/ Virgin: 167/ Vodafone: 382).

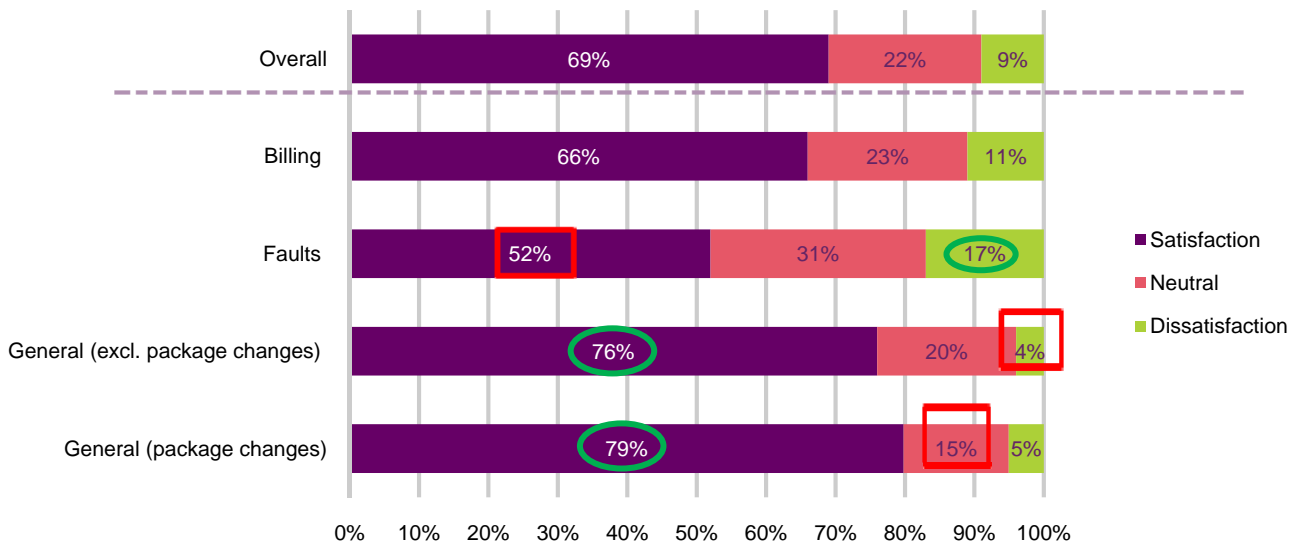
○ / □ Indicates significantly higher/ lower than overall (99% test).

Source: Online Survey

Satisfaction with customer service, by issue type

Figure 4.10 (below) shows the level of satisfaction with customer service from mobile phone service providers by issue type.

Figure 4.10: Mobile phone - Satisfaction with customer service by issue type



Q: Overall, how satisfied are you with the service you received from [PROVIDER] customer services on this occasion? Please give your rating on a scale of 1 to 10, where 10 means that you are extremely satisfied and 1 means you are extremely dissatisfied.

Base: All UK households contacting providers (Billing: 734/ Faults: 499/ General excl: 425/ Pack changes: 268).

○ / □ Indicates significantly higher/ lower than overall (99% test).

Source: Online survey

Overall satisfaction with contacting customer service



Figure 4.11 (below) shows mean satisfaction scores on various aspects of contacting customer service.

Figure 4.11: Mobile – Overall satisfaction with contacting customer service

	3	O2	Orange	T-Mobile	Virgin	Vodafone (F)
Ease of finding provider contact details	7.5	7.5	7.0	7.6	7.5	7.1
Ease of using any automated call routing system (phone only)	6.6	6.8	6.2	6.4	7.0	6.3
Offering to call you back	6.1	5.8	5.7	5.9	6.3	5.7
Calling you back when they said they would	6.5	6.6	6.2	6.2	6.6	6.0
The cost of calling or contacting customer services	7.7	7.1	6.8	7.0	6.8	7.2
Ease of getting through to the right person (phone only)	6.6	7.0	6.4	6.7	7.1	6.4

Q: Overall how satisfied are you with [PROVIDER] as your provider of [service] on a 1 to 10 scale?

Base: All UK households contacting provider (3: 179/ O2: 479/ Orange: 409/ T-Mobile: 310/ Virgin: 167/ Vodafone: 382).

 /  Indicates significantly higher/ lower than overall (99% test).

Source: Online Survey

Overall satisfaction with speed of customer service



Figure 4.12 (below) shows mean satisfaction scores on various aspects to do with the speed of customer service.

Figure 4.12: Mobile – Overall satisfaction with the speed of customer service

	3	O2	Orange	T-Mobile	Virgin	Vodafone
Speed of answering phones (phone only)	6.5	6.8	6.3	6.6	6.8	6.5
Speed of replying to emails (email only)	7.7	6.8	7.4	6.1	7.0	5.8
The time taken to handle issue	6.3	7.0	6.6	6.7	7.1	6.6

Q: Overall how satisfied are you with [PROVIDER] as your provider of [service] on a 1 to 10 scale?

Base: All UK households contacting provider (3: 179/ O2: 479/ Orange: 409/ T-Mobile: 310/ Virgin: 167/ Vodafone: 382).


 /  Indicates significantly higher/ lower than overall (99% test).

Source: Online Survey

Overall satisfaction with customer service advice



Figure 4.13 (below) shows mean satisfaction scores for the standard of advice from customer service.

Figure 4.13: Mobile – Overall satisfaction with the standard of advice from customer service

	3	O2	Orange	T-Mobile	Virgin	Vodafone
Advice/information was easy to understand	 6.4	7.4	7.1	7.0	7.3	7.0
Advice/information was useful	6.5	7.2	6.9	6.8	7.4	6.8
Getting the issue resolved to your satisfaction	6.3	7.1	6.8	6.7	7.2	6.6

Q: Overall how satisfied are you with [PROVIDER] as your provider of [service] on a 1 to 10 scale?

Base: All UK households contacting provider (3: 179/ O2: 479/ Orange: 409/ T-Mobile: 310/ Virgin: 167/ Vodafone: 382).

 /  Indicates significantly higher/ lower than overall (99% test).

Source: Online Survey

Overall satisfaction with customer service adviser



Figure 4.14 (below) shows mean satisfaction with the customer service adviser.

Figure 4.14: Mobile – Overall satisfaction with the adviser of customer service

	3	O2	Orange	T-Mobile	Virgin	Vodafone
Courtesy and politeness of advisers	7.3	7.7	7.5	7.7	8.2	7.5
Adviser ability to understand the issue and identify the problem	6.6	7.4	7.0	7.2	7.6	7.1
Adviser took my questions/issue seriously	7.0	7.4	7.2	7.4	7.8	7.1
Keeping you informed throughout the process	6.7	7.1	7.0	7.1	7.3	6.8
Adviser doing what they say they would do	6.7	7.3	7.0	7.3	7.6	7.0
Logging of query details to avoid having to repeat yourself	6.4	6.8	6.7	6.7	7.3	6.5

Q: Overall how satisfied are you with [PROVIDER] as your provider of [service] on a 1 to 10 scale?

Base: All UK households contacting provider (3: 179/ O2: 479/ Orange: 409/ T-Mobile: 310/ Virgin: 167/ Vodafone: 382).

 /  Indicates significantly higher/ lower than overall (99% test).

Source: Online Survey

Overall satisfaction with customer service generally



Figure 4.15 (below) shows mean satisfaction scores for more general customer service attributes.

Figure 4.15: Mobile – Overall satisfaction generally with customer service

	3	O2	Orange	T-Mobile	Virgin	Vodafone
Offering compensation or a goodwill payment	5.2	5.6	5.2	5.2	5.6	5.2
Willingness to help resolve your issue	6.9	7.3	7.2	7.2	7.6	7.1

Q: Overall how satisfied are you with [PROVIDER] as your provider of [service] on a 1 to 10 scale?

Base: All UK households contacting provider (3: 179/ O2: 479/ Orange: 409/ T-Mobile: 310/ Virgin: 167/ Vodafone: 382).

 /  Indicates significantly higher/ lower than overall (99% test).

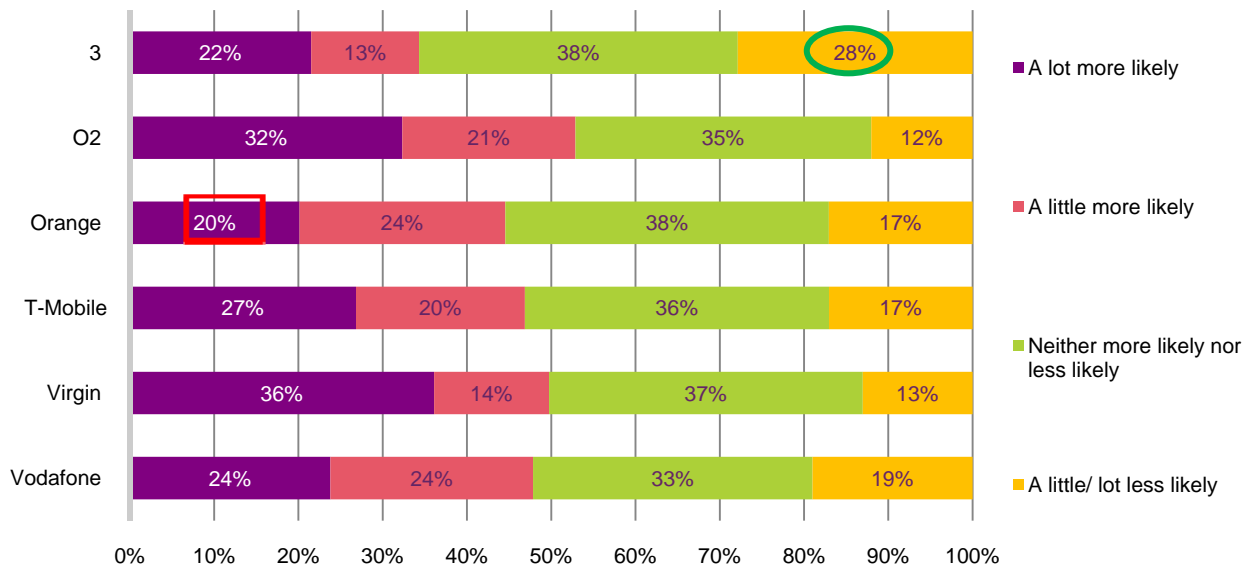
Source: Online Survey

Future use of provider given customer service experience

Figure 4.16 (below) shows the likelihood of using each mobile provider in the future, in light of the customer service experience during the most recent contact.

Figure 4.16: Mobile – Future use of provider given customer service experience

It is important to note that in this type of questioning customers tend to overstate intention to act and reality are likely to be lower



Q: Has the experience of [PROVIDER]'s customer service for this issue made you more likely or less likely to use [PROVIDER] in the future?

Base: All UK households contacting provider (3: 179/ O2: 479/ Orange: 409/ T-Mobile: 310/ Virgin: 167/ Vodafone: 382).

○/□ Indicates significantly higher/ lower than overall (99% test).

Source: Online survey

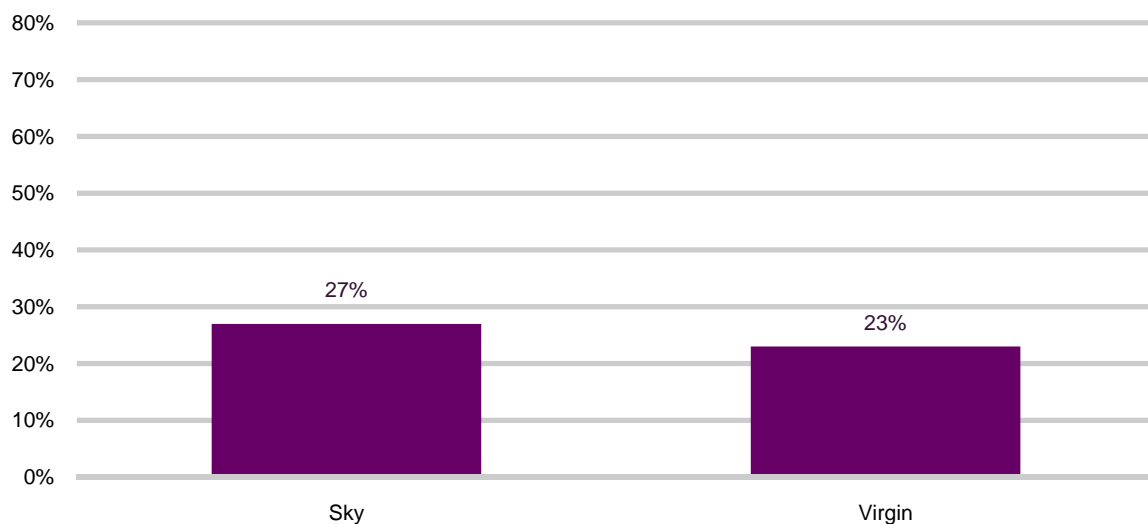
Pay TV Sector Charts

The following charts look specifically at the pay TV sector, in terms of service providers contacted, types of issues calling about, type of contact used, level of issue resolution, number of contacts required, and satisfaction with the service.

Recent contact with provider



Figure 5.1 (below) shows the proportion of customers of different pay TV providers who had contacted that provider in the last three months.

Figure 5.1: Pay TV – Proportion of customers who have contacted their pay TV provider about an issue in the last three months



Q: Thinking of [PROVIDER] and the services you buy from them, have you contacted them in the last 3 months by phone/ email?

Base: All UK households using providers (Sky: 1232/ Virgin: 392).

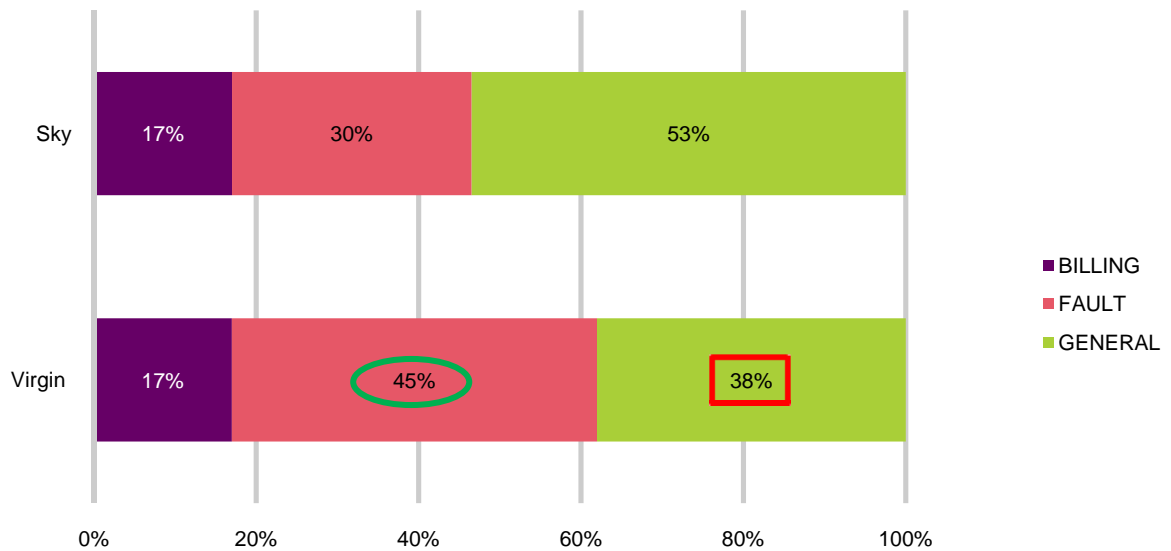
  Indicates significantly higher/ lower than overall (99% test).

Source: GfK Omnibus Survey

Type of call made most recently to service provider

Figure 5.2 (below) shows the type of call made to pay TV providers.

Figure 5.2: Pay TV – Type of call made most recently with pay TV provider



Q: Thinking of the most recent issue you had to contact [PROVIDER] about, which of the following categories did the issue fall into?

Base: All UK households contacting provider (Sky: 315/ Virgin: 112).

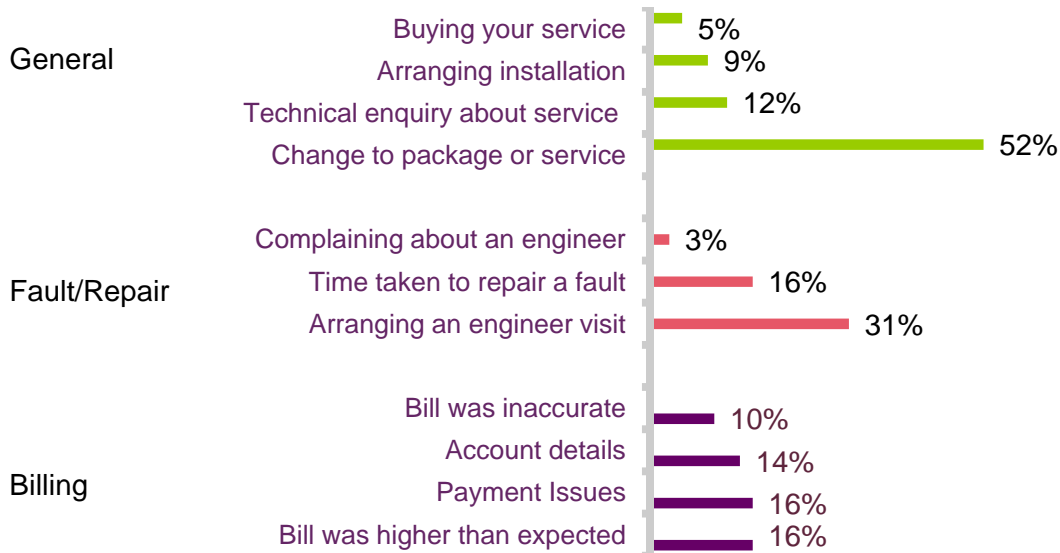
○ / □ Indicates significantly higher/ lower than overall (99% test).

Source: GfK Omnibus Survey

Key issues by contact type

Figure 5.3 (below) shows – for each of the three main types of issue – the most common specific reasons for recent contact with pay TV service providers.

Figure 5.3: Pay TV - Top four issues per contact type



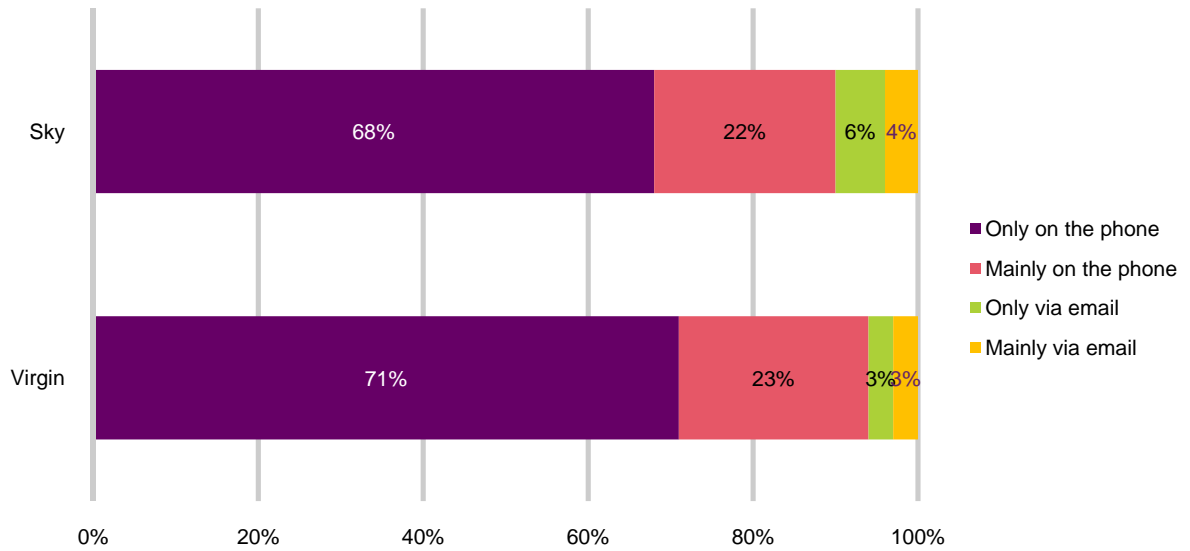
Q: Which of the following best describes what the issue with [PROVIDER] was concerning?
 Base: All UK households contacting provider (Billing: 399/ Fault: 441/General: 503).

Source: Online survey

Type of contact made most recently with service provider

Figure 5.4 (below) shows the way in which customers contacted their pay TV providers

Figure 5.4: Pay TV – Type of contact made most recently with pay TV provider



Q: Thinking of the most recent issue you had to contact [PROVIDER] about, did you contact them only on the phone, mainly on the phone, only via email or mainly via email?

Base: All UK households contacting provider (Sky: 854/ Virgin: 489).

○ / □ Indicates significantly higher/ lower than overall (99% test).

(A,B) etc. next to a score indicates that the marked score is significantly higher than the comparative score for the column or sector indicated by that letter

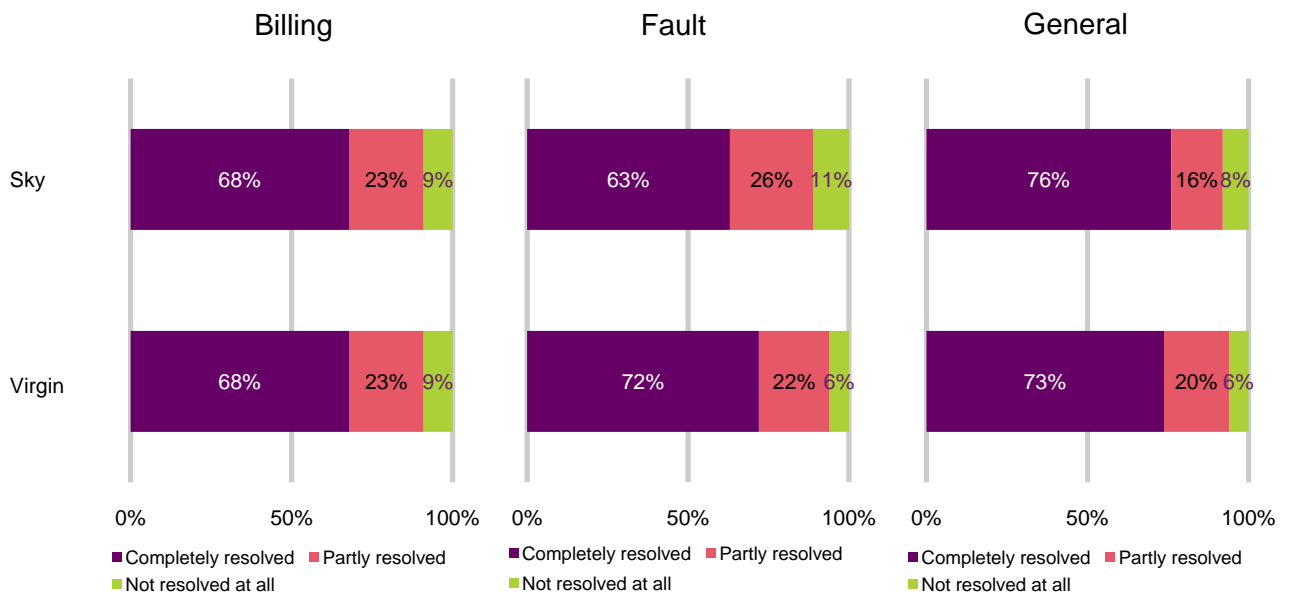
Source: Online Survey

Issue resolution by service provider

Figure 5.5 (below) shows the degree of issue resolution by pay TV providers.

Figure 5.5: Pay TV – Whether issue is seen as ‘resolved’

The resolution of these issues are classified on the basis of what customers indicated when questioned and therefore subject to interpretation. They may not necessarily be reflective of the actual contacts received by the respective providers over the specified period.



Q: In your opinion, was [PROVIDER] able to successfully resolve your issue [billing/ faults/ general enquiries]?
 Base: All UK households contacting provider [Billing/ Fault/ General] (Sky: 255/247/352; Virgin: 144/194/151).

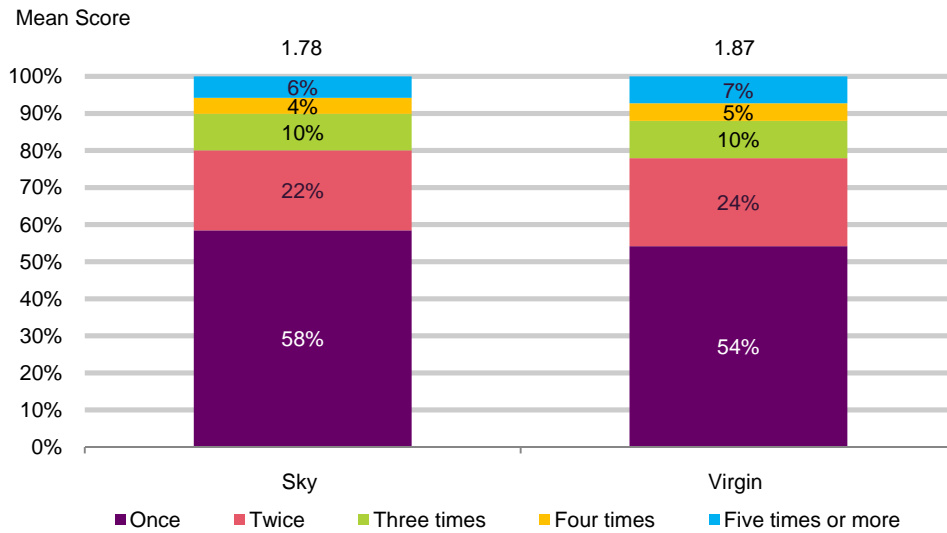
○ / □ Indicates significantly higher/ lower than overall (99% test).

Source: Online Survey

Number of contacts made with service provider

Figure 5.6 (below) shows the number of times customers contacted their pay TV provider regarding their most recent issue.

Figure 5.6: Pay TV – Number of contacts made, by provider



Q: How many times have you been in contact with [PROVIDER] in relation to this particular issue so far?
 Base: All UK households contacting provider (Sky: 854/ Virgin: 489)

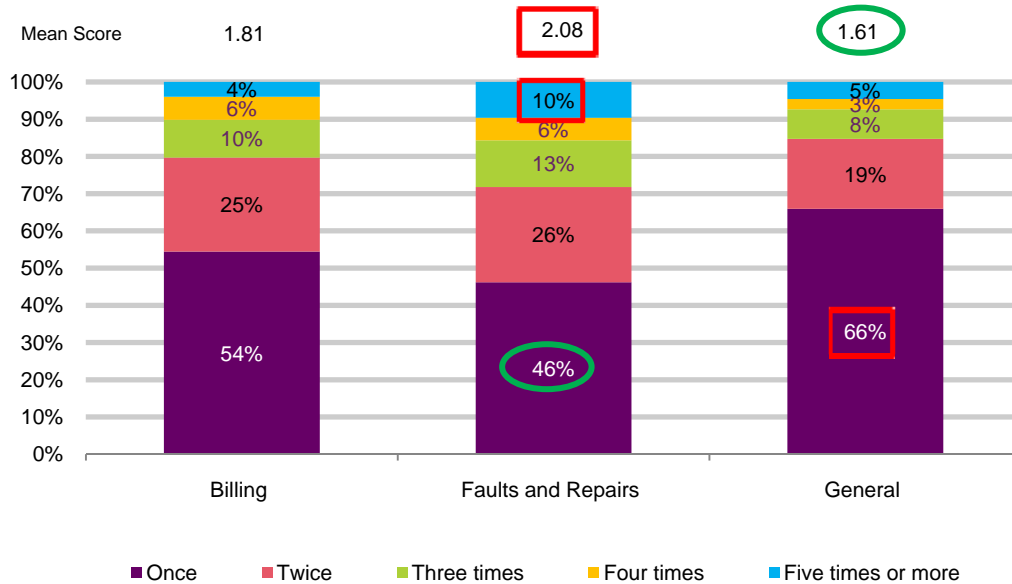
○ / □ Indicates significantly higher/ lower than overall (99% test).

Source: Online Survey

Number of contacts made, by issue type

Figure 5.7 (below) shows – for each of the three issue types – the number of contacts required with the pay TV service provider in order to resolve the issue.

Figure 5.7: Pay TV – Number of contacts made, by issue type



Q: How many times have you been in contact with [PROVIDER] in relation to this particular issue so far?
 Base: All UK households contacting provider (Billing:399/ Faults:441/ General:503).

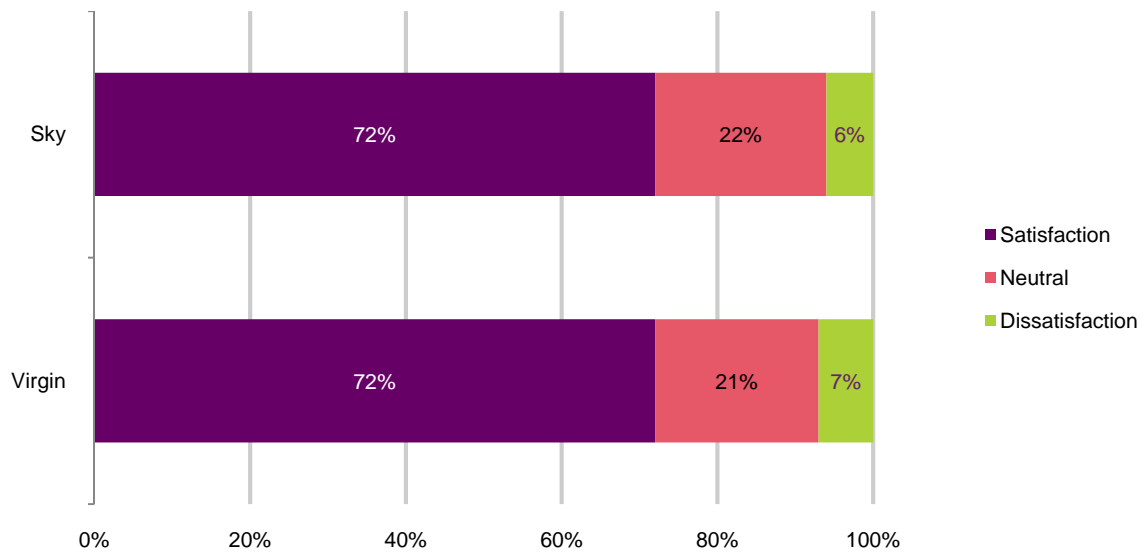
○ / □ Indicates significantly higher/ lower than overall (99% test).

Source: Online survey

Overall satisfaction by provider

Figure 5.8 (below) shows levels of overall satisfaction with pay TV providers.

Figure 5.8: Pay TV – Overall satisfaction by provider



Q: Overall how satisfied are you with [PROVIDER] as your provider of [service] on a 1 to 10 scale?
 Base: All UK households contacting provider (Sky: 854/ Virgin: 489).

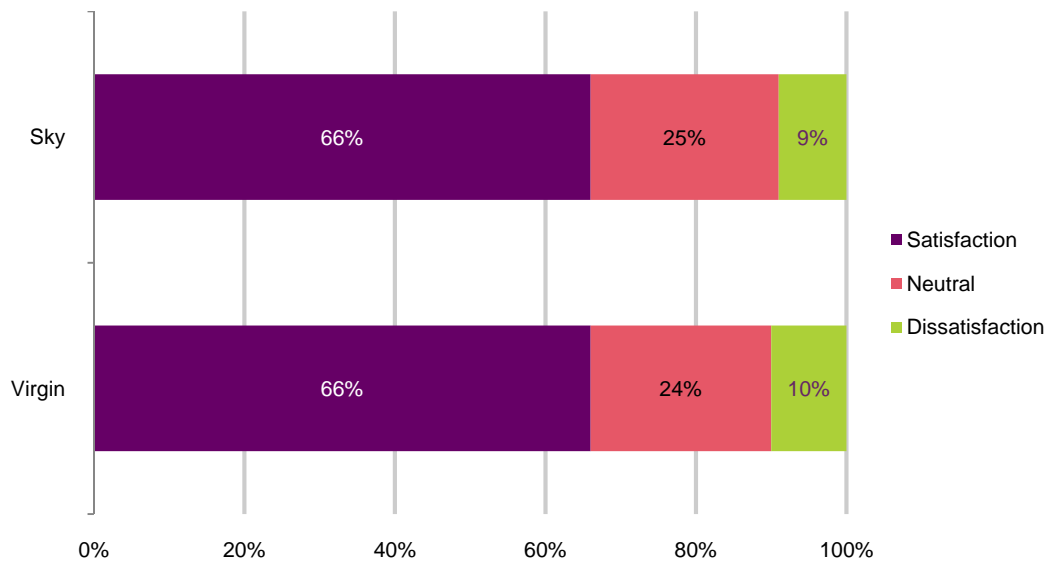
 / Indicates significantly higher/ lower than overall (99% test).

Source: Online Survey

Satisfaction with customer service by provider

Figure 5.9 (below) shows levels of satisfaction with the customer service of pay TV providers.

Figure 5.9: Pay TV – Satisfaction with customer service by provider



Q: Overall how satisfied are you with [PROVIDER] as your provider of [service] on a 1 to 10 scale?
 Base: All UK households contacting provider (Sky: 854/ Virgin: 489).

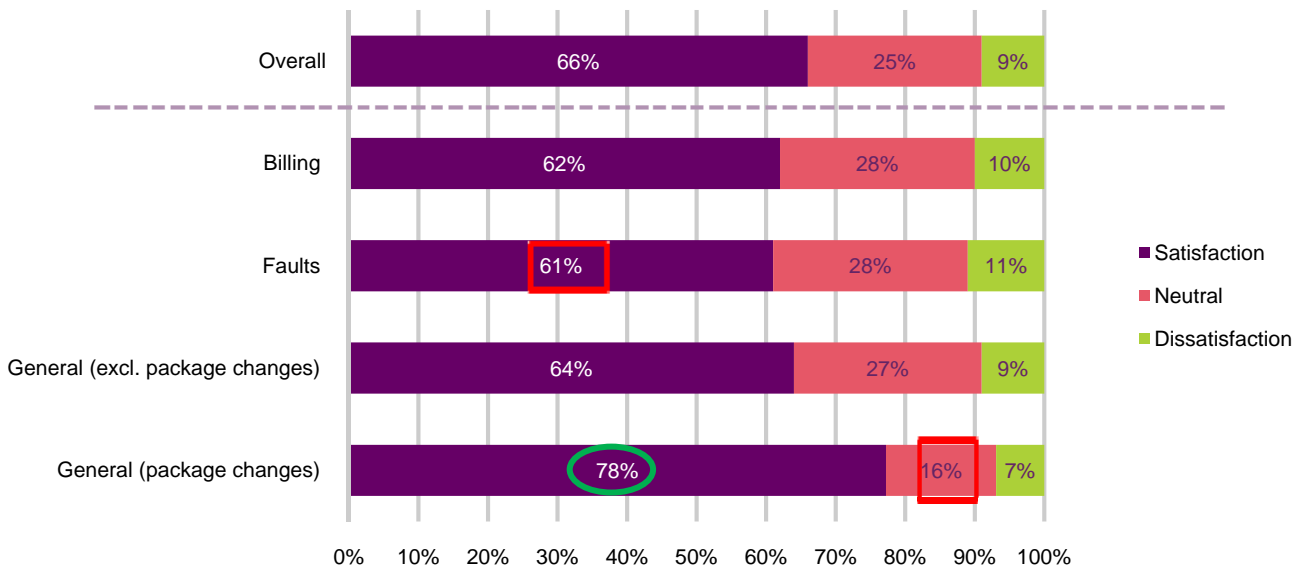
○ / □ Indicates significantly higher/ lower than overall (99% test).

Source: Online Survey

Satisfaction with customer service, by issue type

Figure 5.10 (below) shows the level of satisfaction with customer service from pay TV service providers by issue type.

Figure 5.10: Pay TV - Satisfaction with customer service by issue type



Q: Overall, how satisfied are you with the service you received from [PROVIDER] customer services on this occasion? Please give your rating on a scale of 1 to 10, where 10 means that you are extremely satisfied and 1 means you are extremely dissatisfied.

Base: All UK households contacting providers (Billing: 366/ Faults: 441/ General excl: 246/ Pack changes: 257).

○ / □ Indicates significantly higher/ lower than overall (99% test).

Source: Online survey



Overall satisfaction with contacting customer service

Figure 5.11 (below) shows mean satisfaction scores on various aspects of contacting customer service.

Figure 5.11: Pay TV – Overall satisfaction with contacting customer service

	Sky	Virgin
Ease of finding provider contact details	6.6	7.6
Ease of using any automated call routing system (phone only)	6.0	6.6
Offering to call you back	5.1	5.6
Calling you back when they said they would	5.9	6.1
The cost of calling or contacting customer services	5.5	7.5
Ease of getting through to the right person (phone only)	6.0	6.6

Q: Overall how satisfied are you with [PROVIDER] as your provider of [service] on a 1 to 10 scale?
Base: All UK households contacting provider (Sky: 854/ Virgin: 489).

 /  Indicates significantly higher/ lower than overall (99% test).

Source: Online Survey



Overall satisfaction with speed of customer service

Figure 5.12 (below) shows mean satisfaction scores on various aspects to do with the speed of customer service.

Figure 5.12: Pay TV – Overall satisfaction with the speed of customer service

	Sky	Virgin
Speed of answering phones (phone only)	5.9	6.3
Speed of replying to emails (email only)	7.0	6.8
The time taken to handle issue	6.4	6.7

Q: Overall how satisfied are you with [PROVIDER] as your provider of [service] on a 1 to 10 scale?
Base: All UK households contacting provider (Sky: 854/ Virgin: 489).

 /  Indicates significantly higher/ lower than overall (99% test).

Source: Online Survey



Overall satisfaction with customer service advice

Figure 5.13 (below) shows mean satisfaction scores for the standard of advice from customer service. There was no significant difference in provider performance in this area.

Figure 5.13: Pay TV - Overall satisfaction with the standard of advice from customer service

	Sky	Virgin
Advice/information was easy to understand	6.9	7.0
Advice/information was useful	6.7	6.8
Getting the issue resolved to your satisfaction	6.7	6.9

Q: Overall how satisfied are you with [PROVIDER] as your provider of [service] on a 1 to 10 scale?
Base: All UK households contacting provider (Sky: 854/ Virgin: 489).

 /  Indicates significantly higher/ lower than overall (99% test).

Source: Online Survey



Overall satisfaction with customer service adviser

Figure 5.14 (below) shows mean satisfaction with the customer service adviser. There was no significant difference between the results by provider.

Figure 5.14: Pay TV – Overall satisfaction with the adviser of customer service

	Sky	Virgin
Courtesy and politeness of advisers	7.4	7.6
Adviser ability to understand the issue and identify the problem	6.9	7.0
Adviser took my questions/issue seriously	7.1	7.4
Keeping you informed throughout the process	6.8	7.0
Adviser doing what they say they would do	7.0	7.2
Logging of query details to avoid having to repeat yourself	6.5	6.8

Q: Overall how satisfied are you with [PROVIDER] as your provider of [service] on a 1 to 10 scale?
Base: All UK households contacting provider (Sky: 854/ Virgin: 489).

 /  Indicates significantly higher/ lower than overall (99% test).

Source: Online Survey



Overall satisfaction with customer service generally

Figure 5.15 (below) shows mean satisfaction scores for more general customer service attributes.

Figure 5.15: Pay TV – Overall satisfaction generally with customer service

	Sky	Virgin
Offering compensation or a goodwill payment	5.0	5.2
Willingness to help resolve your issue	6.9	7.2

Q: Overall how satisfied are you with [PROVIDER] as your provider of [service] on a 1 to 10 scale?
Base: All UK households contacting provider (Sky: 854/ Virgin: 489).

 /  Indicates significantly higher/ lower than overall (99% test).

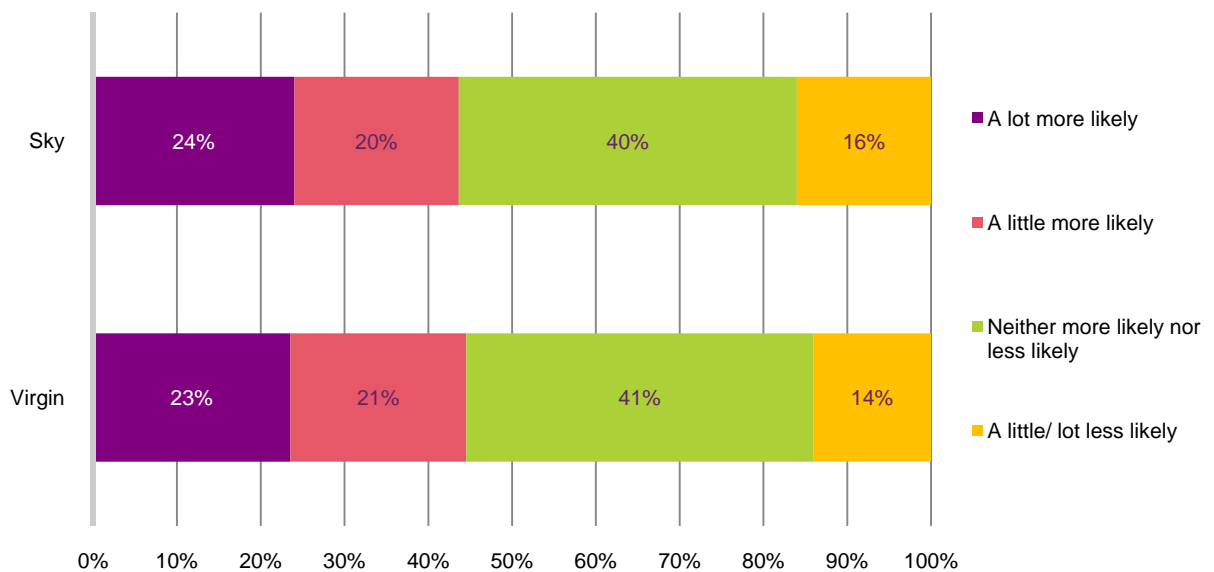
Source: Online Survey

Future use of provider given customer service experience

Figure 5.16 (below) shows the likelihood of using each mobile provider in the future, in light of the customer service experience during the most recent contact.

Figure 5.16: Pay TV – Future use of provider given customer service experience

Important to note that in this type of questioning that customers tend to overstate intention to act and in reality actions are likely to be lower.



Q: Has the experience of [PROVIDER]'s customer service for this issue made you more likely or less likely to use [PROVIDER] in the future?

Base: All UK households contacting provider (Sky: 854/ Virgin: 489).

○ / □ Indicates significantly higher/ lower than overall (99% test).

Source: Online survey

Questionnaire

Screener

ASK ALL / SINGLE CODE
S1 Standard panel question to record exact age

CLOSE IF UNDER 18

ASK ALL / SINGLE CODE
S2 Standard panel question to record gender

ASK ALL / SINGLE CODE PER PROVIDER
S3 Which company does your household use for the following services, if any?

- A. Landline telephone calls
- B. Broadband internet (HOVER-OVER TEXT: This refers to broadband delivered via your household landline, NOT via a 3G connection from a mobile operator)
- C. Cable/ Satellite 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))

CLOSE IF 'OTHER' OR 'DO NOT USE' CODED FOR EVERY SERVICE

ASK ALL USING AT LEAST ONE ELIGIBLE PROVIDER / SINGLE CODE
S4 Thinking of [PROVIDER] and the services you buy from them, have you contacted them in the last 3 months by telephone or email?

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

ASK IF USE ANY PROVIDER FOR MORE THAN ONE SERVICE AT S3, AND HAVE CONTACTED THEM AT S4 / MULTICODE
S5 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 calls
- 2. Broadband internet
- 3. Cable/ Satellite TV
- 4. Mobile phone services (not including mobile broadband)

ASK FOR ALL PROVIDERS CONTACTED (S4=1). IF NO PROVIDERS CONTACTED (S4=1), CLOSE / SINGLE CODE

S6 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

ASK FOR ALL PROVIDERS CONTACTED (S4=1) / SINGLE CODE

S7 (A-C) 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/BORADBAND/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 (eg problems trying to switch or switched without permission)
14. A different issue (please describe it briefly in your own words) _____

Service Satisfaction

ASK FOR ALL PROVIDERS CONTACTED AT S4, AND SEPARATELY FOR EACH SERVICE USED (SO MULTIPLE TIMES FOR BUNDLED PROVIDERS) / SINGLE CODE

- Q1 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

ASK ALL – ONLY ONCE PER PROVIDER CONTACTED, REGARDLESS OF BUNDLING / SINGLE CODE

- Q2 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 email or mainly via email?

1. Only on the phone
2. Mainly on the phone
3. Only via email
4. Mainly via email
5. Don't Know

ASK ALL – ONLY ONCE PER PROVIDER CONTACTED, REGARDLESS OF BUNDLING / SINGLE CODE

Q3 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

ASK ALL – ONLY ONCE PER PROVIDER CONTACTED, REGARDLESS OF BUNDLING / SINGLE CODE

Q4 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. Ease of using any automated call routing system (PHONE)
- C. Offering to call you back
- D. Calling back when they said they would
- E. The cost of calling or contacting customer services
- F. Ease of getting through to the right person (PHONE)

SCREEN 2:

Speed...

- G. Speed of answering phones (PHONE)
- H. Speed of replying to emails (EMAIL)
- I. The time taken to handle your issue

Standard of advice...

- J. Advice/information was easy to understand
- K. Advice/information was useful
- L. Getting the issue resolved to your satisfaction

SCREEN 3:

Adviser...

- M. Courtesy and politeness of advisers
- N. Adviser ability to understand the issue and identify the problem
- O. Adviser took my question/issue seriously
- P. Keeping you informed throughout the process
- Q. Adviser doing what they said they would do
- R. Logging of query details to avoid having to repeat yourself

General...

- S. Offering compensation or a goodwill payment
- T. Willingness to help resolve your issue

ASK ALL – ONLY ONCE PER PROVIDER CONTACTED, REGARDLESS OF BUNDLING / SINGLE CODE

Q5 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

ASK ALL – ONLY ONCE PER PROVIDER CONTACTED, REGARDLESS OF BUNDLING / SINGLE CODE

Q6 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

ASK ALL – ONLY ONCE PER PROVIDER CONTACTED, REGARDLESS OF BUNDLING / SINGLE CODE

Q7 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

ASK ALL – ONLY ONCE PER PROVIDER CONTACTED, REGARDLESS OF BUNDLING / SINGLE CODE

Q8 Assuming you were provided with information about different companies' customer service ratings, so that you could distinguish between good and bad performance ... Which of the following statements do you think would best describe your attitude to that information if you were thinking about changing from [PROVIDER] to an alternative provider?

- 1. I would not pay much or any attention to it
- 2. I would look at it but would not choose a provider based on it
- 3. I would look at it and bear it in mind when choosing a provider
- 4. I would look at it and it would be an important part in helping me to choose a provider
- 5. Don't Know

Classification

ASK ALL MOBILE OWNERS WHO HAVE ANSWERED ABOUT A CUSTOMER SERVICE EVENT FOR AN ELIGIBLE MOBILE NETWORK AT S3D / SINGLE CODE

CL1 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

ASK ALL / SINGLE CODE

CL2 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

ASK ALL / SINGLE CODE

CL3 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

ASK ALL / SINGLE CODE

CL4 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

ASK ALL / MULTI-CODE

CL5 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

Appendix 2: Omnibus

3002 short interviews were conducted via GfK's weekly nationally representative telephone omnibus.

The questionnaire

- ASK ALL / SINGLE CODE
- Q1 Which company does your household use for normal, landline telephone calls? If you use more than company for landline calls, please tell me about the one you use most often. We are only interested in the company you use for household landline calls only, this may be a different to your line rental provider, and does not include mobile calls
1. BT
 2. Virgin Media
 3. Talk Talk/ AOL/ Carphone Warehouse
 4. Sky
 5. Other
- DK. Don't Know
- ASK ALL / SINGLE CODE
- Q2 And thinking of your personal mobile phone, so not one that might be provided to you by your work, which network are you on? Again 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. Don't have a mobile
 8. Other
- DK. Don't Know
- ASK ALL / SINGLE CODE
- Q.3 Which company does your household use for its broadband Internet connection? By this I mean, broadband used through your household phone line, and not a mobile broadband connection where you 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
 3. Sky
 4. Talk Talk/ AOL/ Carphone Warehouse
 5. Tiscali/ Pipex
 6. Virgin Media
 7. Don't have broadband
 8. Other
- DK. Don't Know

ASK ALL / SINGLE CODE

Q.4 Which company does your household use for cable or satellite TV, if any? 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. Don't have pay TV
 4. Other
- DK. Don't Know

ASK Q.5 FOR ALL COMPANIES CODED AT Q.1/2/3/4 (Q.1 CODES 01-04, Q.2 CODES 01-06, Q.3 CODES 01-06, Q.4 CODES 01-02) AND ASK SEPARATELY FOR EACH SERVICE FOR COMPANIES USED FOR MORE THAN ONE SERVICE:

Q5 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?

SERVICE LIST

1. Landline telephone calls – ASK FOR COMPANY CODED AT Q.1 CODES 01-04
2. Mobile phone services – ASK FOR COMPANY CODED AT Q.2 CODES 01-06
3. Broadband internet – ASK FOR COMPANY CODED AT Q.3 CODES 01-06
4. Satellite or cable TV – ASK FOR COMPANY CODED AT Q.4 CODES 01-02

ASK FOR ALL COMPANIES CODED AT Q.1/2/3/4 (Q.1 CODES 01-04, Q.2 CODES 01-06, Q.3 CODES 01-06, Q.4 CODES 01-02) BUT ONLY ASK EACH COMPANY ONCE IF USED FOR MORE THAN ONE PRODUCT:

SINGLE CODE

Q6 Thinking of [COMPANY] and the services you buy from them, have you contacted them in the last 3 months by telephone or email?

ASK FOR BT IF Q.1 CODE 01 OR Q.3 CODE 01
 ASK FOR VIRGIN IF Q.1 CODES 02 OR IF Q.2 CODED 05
 Q.3 CODED 06 OR Q.4 CODED 02
 ASK FOR TALK TALK/AOL/CARPHONE WHAREHOUSE IF Q.1 CODED 03 OR Q.3 CODED 04
 ASK FOR SKY IF Q.1 CODED 04 OR Q.3 CODED 03 OR Q.4 CODED 01
 ASK FOR 02 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 TISCALI/PIPEX IF Q.3 CODED 05

1. Yes
2. No
3. DK

ASK Q.7 AND Q.8 AND Q.9 IN A LOOP FOR THESE SPECIFIED PROVIDERS IF:

BT IF USE BT AT Q.1 AND Q.3 AND CODE 01 FOR BT AT Q.6

TALK TALK IF USE TALK TALK AT Q.1 AND Q.3 AND CODE 01 FOR TALK TALK AT Q.6

ORANGE IF USE ORANGE AT Q.2 AND Q.3 AND CODE 01 FOR ORANGE AT Q.6
 VIRGIN IF USE VIRGIN AT 2 OR MORE OF Q.1/2/3/4 AND CODE 01 FOR VIRGIN AT Q.6
 SKY IF USE SKY AT 2 OR MORE OF Q.1/3/4 AND CODE 01 FOR SKY 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 (FROM Q.1)
2. Mobile phone (FROM Q.2)
3. Broadband (FROM Q.3)
4. Cable or satellite TV (FROM Q.4)
5. General issue
6. Don't Know

ASK Q.8 and 9 FOR ALL COMPANIES CODED AT Q.1/2/3/4 (Q.1 CODES 01-04, Q.2 CODES 01-06, Q.3 CODES 01-06, Q.4 CODES 01-02) 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 AND Q.6 CODE 01
 ASK FOR VIRGIN IF Q.1 CODES 02 IF Q.2 CODED 05 OR Q.3 CODED 06 OR Q.4 CODED 02 AND Q.6 CODE 01
 ASK FOR TALK TALK/AOL/CARPHONE WAREHOUSE IF Q.1 CODED 03 OR Q.3 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 02 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 TISCALI/PIPEX IF Q.3 CODED 05 AND Q.6 CODE 01

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 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

READ OUT. SINGLE CODE

Q.9 Did you discuss this issue with [COMPANY] only on the phone, mainly on the phone, only via email or mainly via email?

1. Only by phone
2. Mainly by phone
3. Only via email
4. Mainly via email

Appendix 3: Sample profile

It was the objective of the study to gain a representative sample of the UK population who have recently contacted their service provider about a billing/ fault/ general issue. During fieldwork, therefore, a quota sample methodology was adopted to ensure that minimum targets were achieved for the providers and also for the three issue types.

Table 1.1: Unweighted profile of the survey data

	Total Base	
Gender	Male	48 %
	Female	52 %
Age	18-24	15 %
	25-34	26 %
	35-44	22 %
	45-54	17 %
	55-64	11 %
	65+	9 %
Working Status	Full Time	52 %
	Part Time	15 %
	Other	33 %
Region (GOR)	East Midlands	8%
	Eastern	5%
	London	13%
	North East	6%
	North West	11%
	Scotland	11%
	South East	17%
	South West	7%
	Ulster / Northern Ireland	2%
	Wales	4%
	West Midlands	8%
	Yorks & Humber	8%