Switching Tracker 2015

Chart pack

Methodology

- The Switching Tracker is Ofcom's key data source on switching levels, attitudes and experiences across the communications markets (fixed, mobile, fixed broadband and multi-channel/Pay TV). Since 2007 Ofcom has run this tracking study among UK adults (decision makers in each market) to measure participation levels, switching incidence and ease of switching, as well as satisfaction levels in each market.

- We have shifted from RDD telephone interviewing (2014 and prior) to face-to-face interviewing. In order to understand and *measure* the impact any change in methodology has on results, this year's study was split to achieve half by telephone (1501 interviews) and half face-to-face (1527 interviews). Analysis across the survey methods shows that there were no differences in terms of the incidence of switching or perceptions of switching and that both sets of respondents understood the questions and gave considered answers

- Fieldwork took place in July – August 2015. Questions are asked up front to establish household ownership of landline, fixed broadband, TV service and mobile phone. For each service, the questionnaire established whether the respondent is the decision maker. Questions of the decision maker also established whether any of the household's services are in a bundle or package from the same supplier.

- On completion of the interviews, weighting is applied for each section (i.e. each of the above markets) of the survey using profiles from our Communications Tracking Survey.

- Throughout the chart pack ↓ indicates significant decrease, ↑ indicates significant increase at 99% confidence level, compared to 2014.

Engagement Index

Engagement index – per service

- Engagement in communications market is measured by looking at the wide range of ways people can participate in the markets – including past and present behaviour.
  - *Past behaviour*: whether switched or considered switching
  - *Present behaviour*: whether considering switching or keep informed about developments
- **Inactive**: may have had some past involvement but have low interest in the market. This group does not keep up to date with the market
- **Passive**: more likely than inactive consumers to have participated in the past, and indicate some current interest in the market.
- **Interested**: broadly similar to passive in terms of past behaviour but they are more likely to keep an eye on the market, keeping an eye out for better deals
- **Engaged**: most active group in terms of past behaviour and current interest.

Engagement index – per service

Previous behaviour (maximum score of 50)	Score
Switched provider in last 2 years	50
Considered switching & shopped in last 2 years	50
Considered switching & did not shop in last 2 years	20
Not switched, but negotiated with current supplier	20
Current behaviour (maximum score of 50)	Score
Very active considerers (actively looking for an alternative provider)	50
Active considerers (open to the idea of a new provider)	35
Not considerers, but happy with current supplier and rate them as definitely the best provider in the market	40
Not considerers, but happy with current supplier and rate them as probably the best provider in the market	25

- This Engagement index is based on previous and current behaviour in equal measure
  - with a maximum index of 100 per service, and a minimum of 0 if none of these behaviours apply

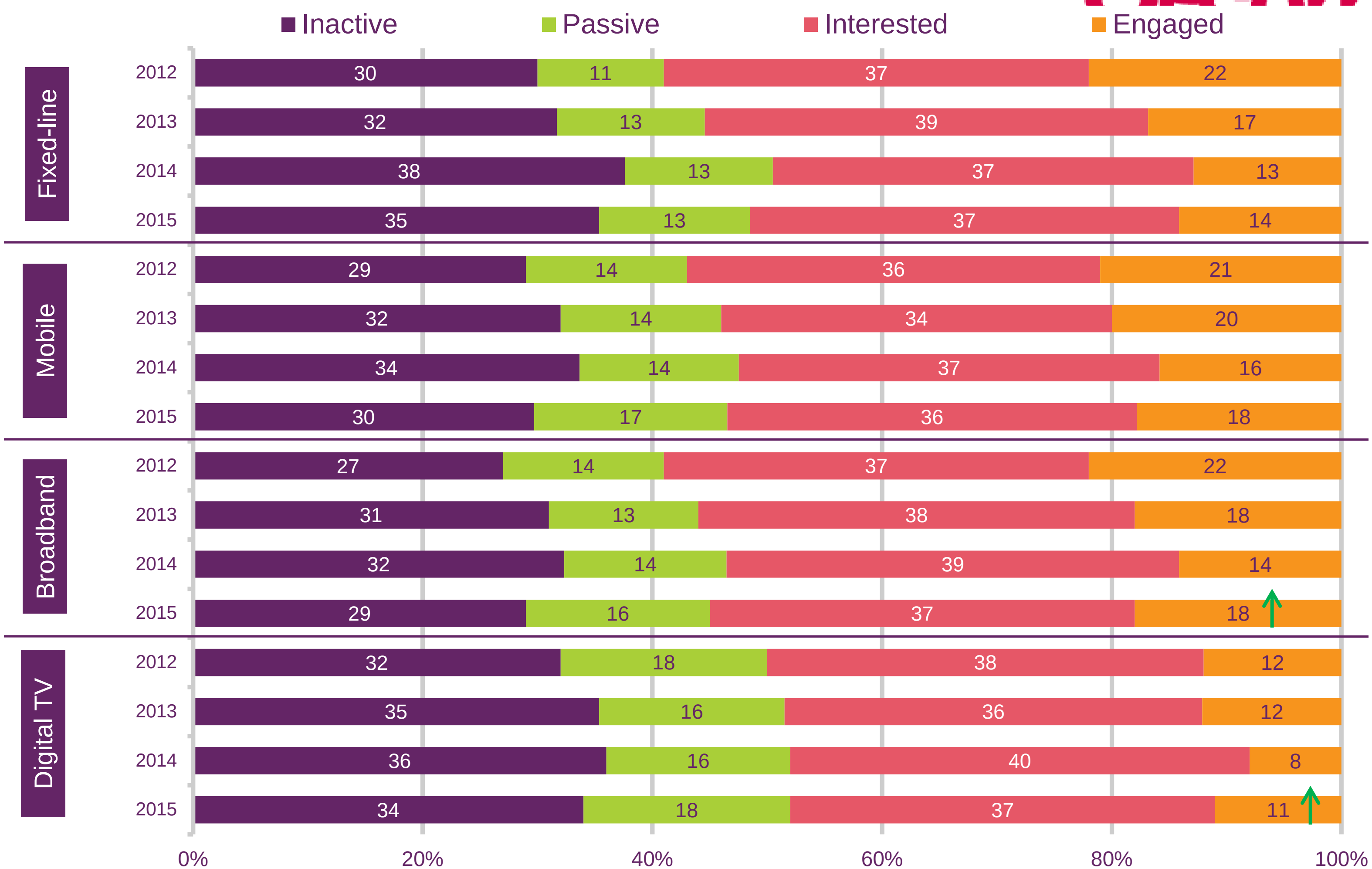
Engagement category

■ Inactive (0) ■ Passive (1-30) ■ Interested (31-50) ■ Engaged (51-100)

- Once the index scores associated with the consumer's previous and current behaviour for a given service have been calculated, the resulting total per consumer falls into one of the four categories shown above:
  - Inactive (0 out of 100)
  - Passive (1-30 out of 100)
  - Interested (31-50 out of 100)
  - Engaged (51 or more out of 100)

Charts

Trend in levels of participation, by total market: 2012-2015



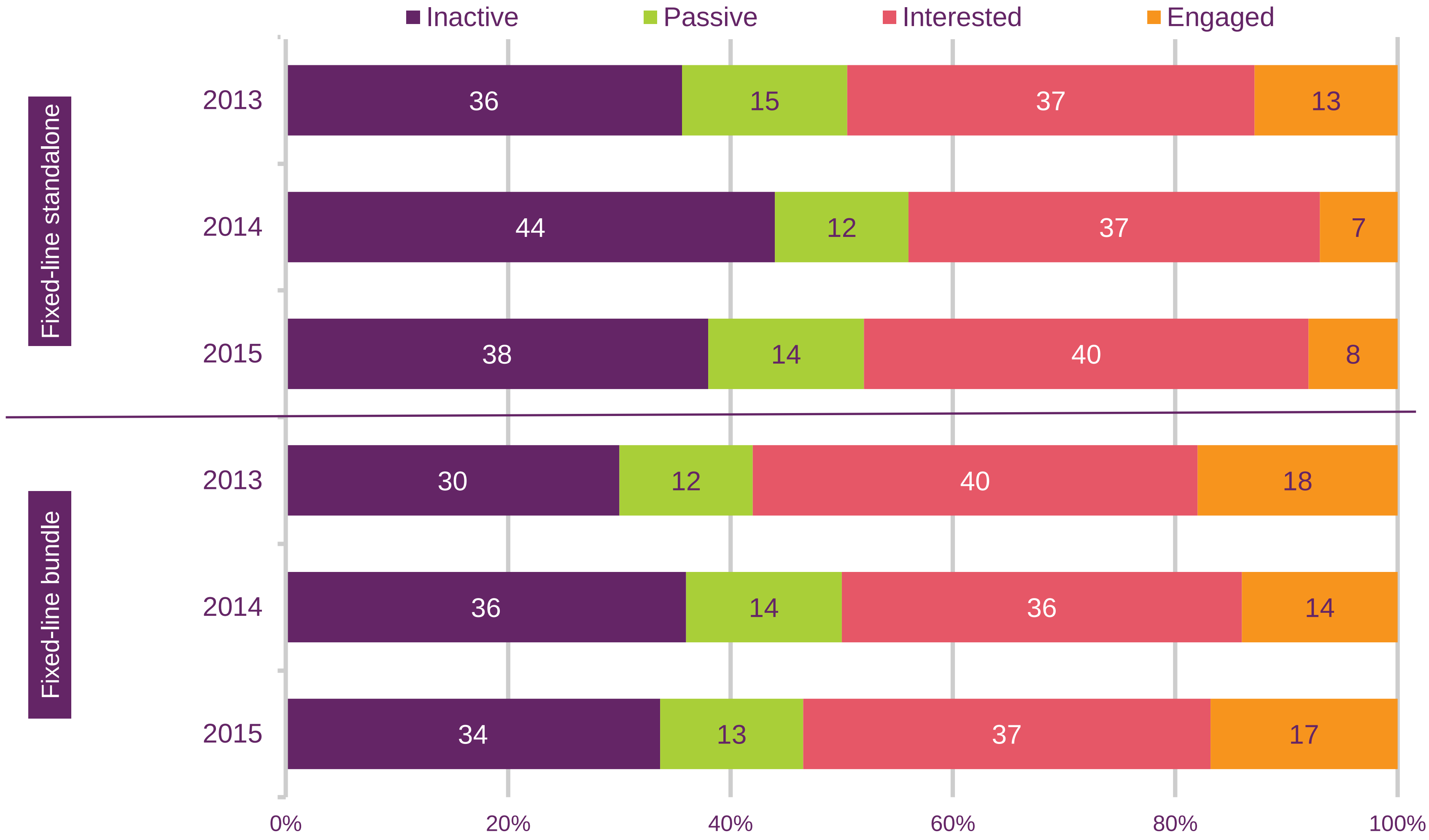
Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2012, 2013, 2014 and 2015
Base: All adults aged 16+ who are the decision-maker for fixed line (whole market, 1636 2012, 1596 2013, 1736 2014, 2199 2015), mobile (whole market, 1714 2012, 1718 2013, 1679 2014, 2609 2015), broadband (whole market, 1341 2012, 1291 2013, 1464 2014, 1877 2015), digital TV (whole market, 1483 2012, 1592 2013, 1723 2014, 2251 2015)

Participation index by purchasing behaviour

Participation index	Fixed line		Broadband		TV			
	Bundle (n=1553)	Single (n= 646)	Bundle (n= 1572)	Single (n=305)	Bundle (n=851)	Single (n=1400)	Pay TV (n=1302)	Free-to-air (n=948)
Engaged	17%	8%	18%	19%	16%	8%	15%	5%
Interested	37%	40%	38%	30%	41%	34%	42%	30%
Passive	13%	14%	16%	15%	18%	18%	19%	17%
Inactive	34%	38%	28%	36%	24%	40%	24%	48%
Engaged/interested	**54%**	**48%**	**56%**	**49%**	**57%**	**42%**	**57%**	**35%**

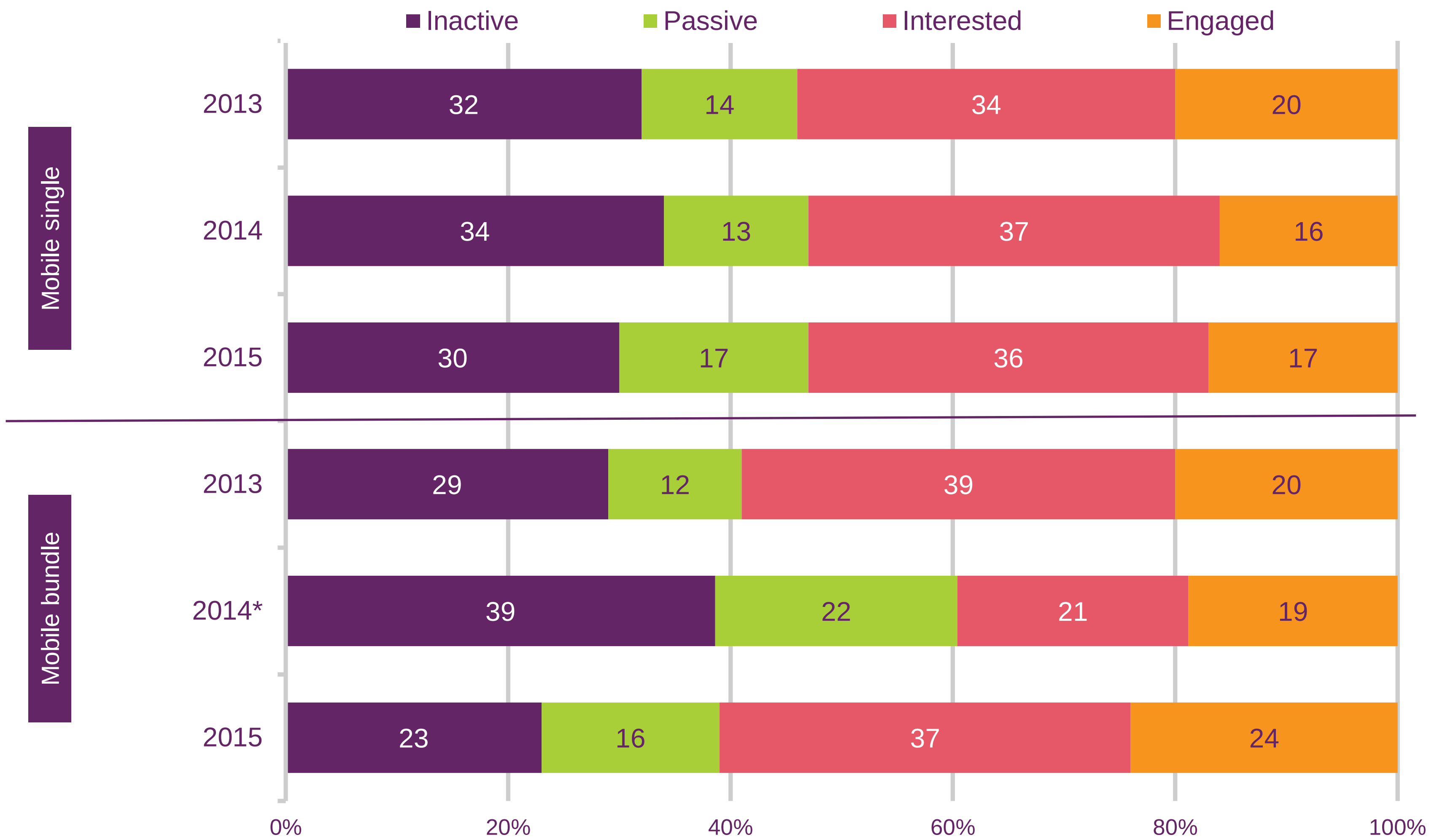
Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2015
Base: All adults aged 16+ who are the decision-maker for fixed line fixed line (single purchase, 646, service in bundle, 1553), broadband (single purchase, 305, service in bundle, 1572), TV (single purchase, 1400, service in bundle, 851, pay TV, 1302, free-to-air TV, 948)

Fixed-line market trend in participation, by purchasing behaviour



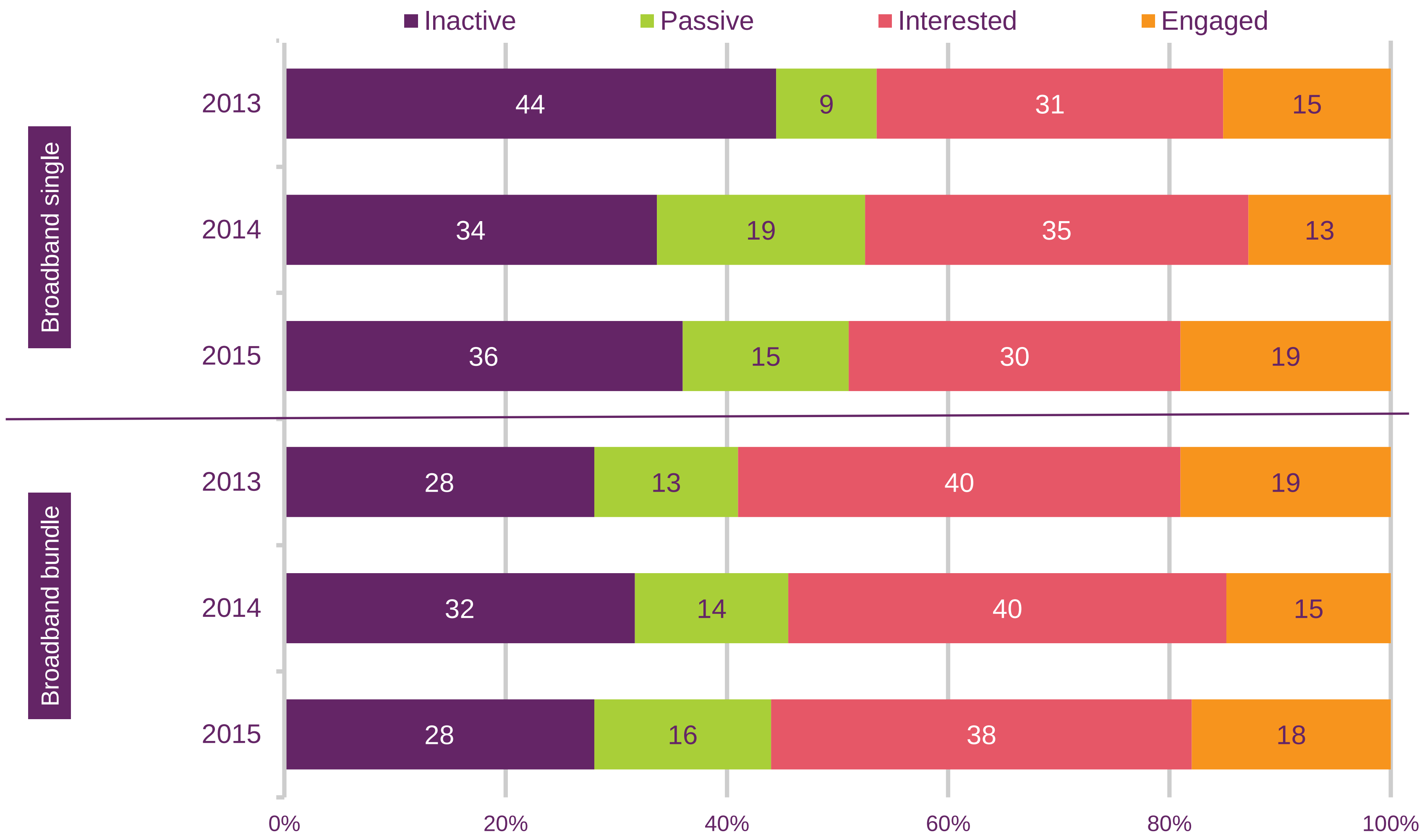
Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2014 and 2015
Base: All adults aged 16+ who are the decision-maker for fixed line (single purchase, 518 2013, 409 2014, 646 2015) (service in bundle, 1078 2013, 1327 2014, 1553 2015)

Mobile market trend in participation, by purchasing behaviour



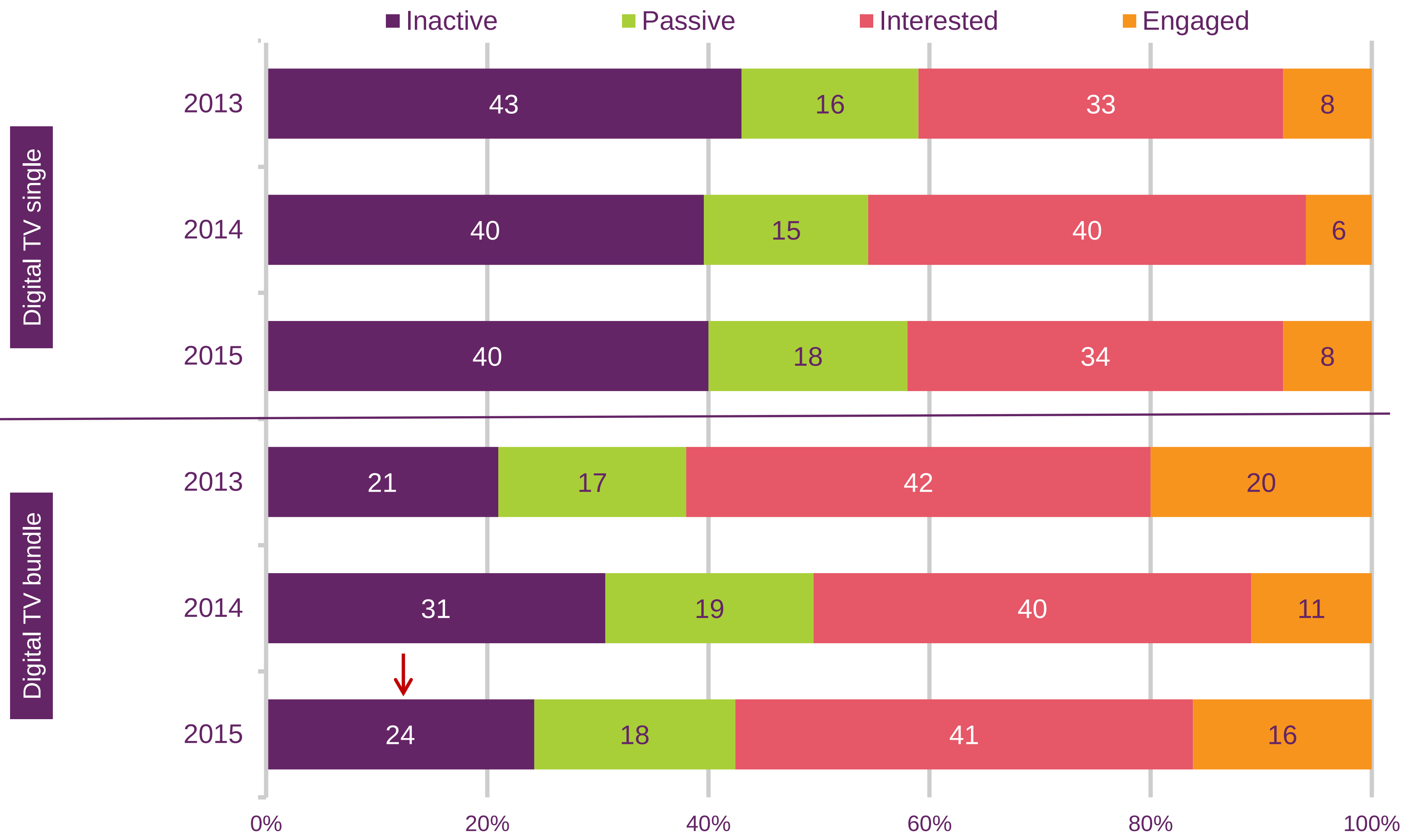
Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2014 and 2015
Base: All adults aged 16+ who are the decision-maker for mobile (single purchase, 1609 2013, 1614 2014, 2461 2015) (service in bundle, 109 2013, *65 2014, 148 2015). *Caution: Low base, treat as indicative only.

Fixed broadband market trend in participation, by purchasing behaviour



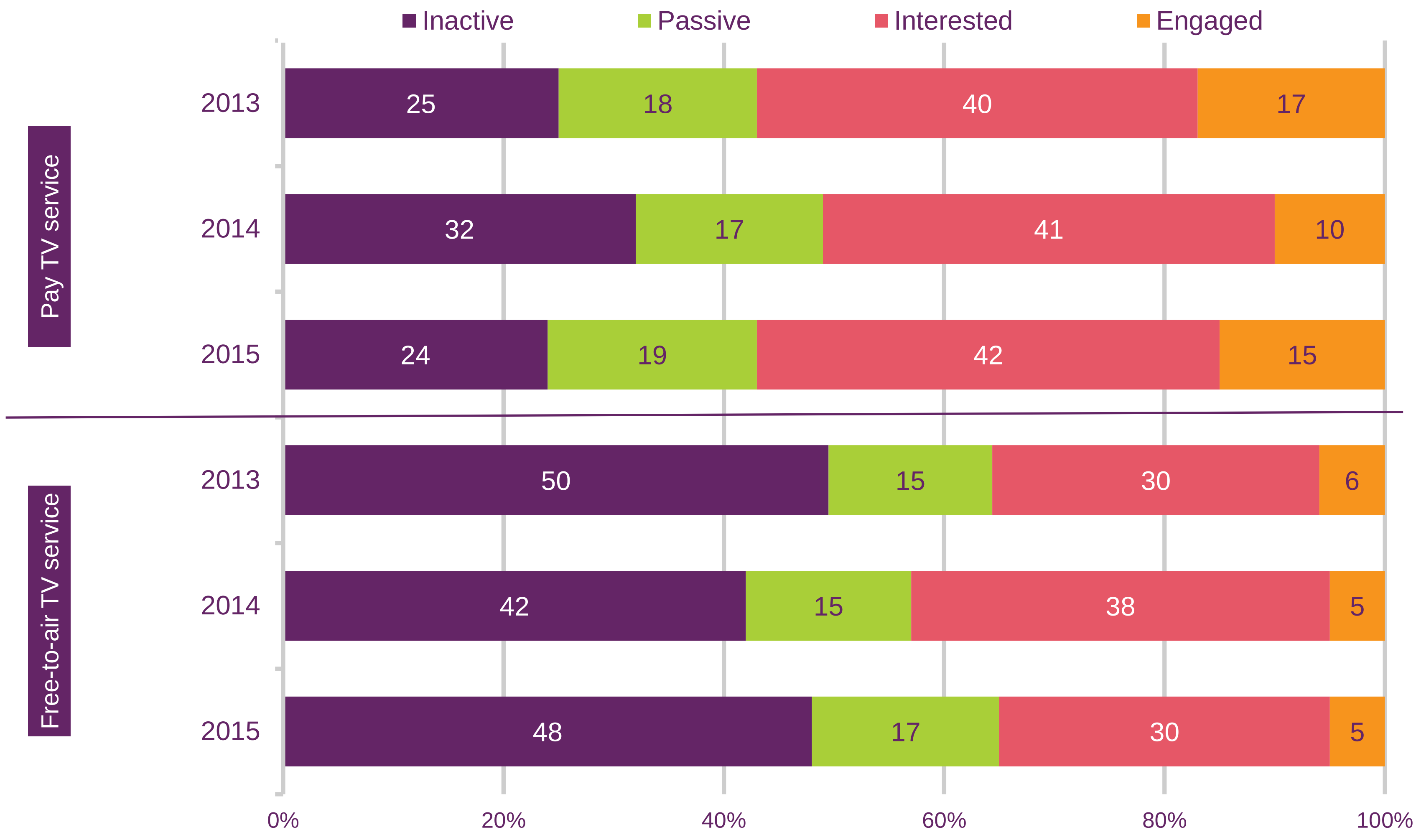
Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2014 and 2015
Base: All adults aged 16+ who are the decision-maker for broadband (single purchase, 222 2013, 149 2014, 305 2015) (service in bundle, 1069 2013, 1313 2014, 1572 2015)

Digital TV market trend in participation, by purchasing behaviour



Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2014 and 2015
Base: All adults aged 16+ who are the decision-maker digital TV (single purchase, 1104 2013, 1088 2014, 1400 2015) (service in bundle, 488 2013, 635 2014, 851 2015)

TV market trend in participation, by pay TV and free-to-air TV

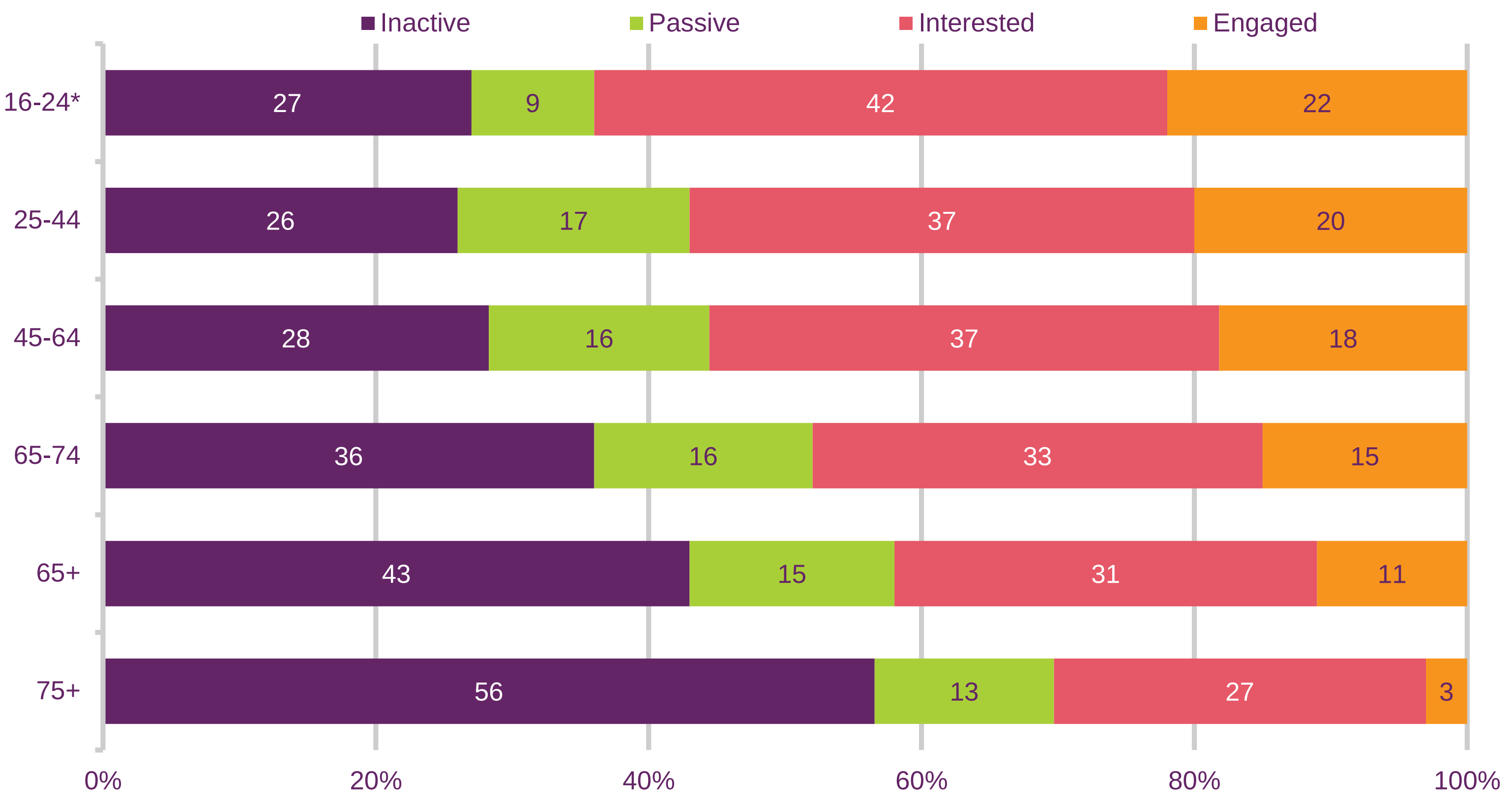


Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2013, 2014 and 2015
Base: All adults aged 16+ who are the decision-maker digital TV (pay TV, 908 2013, 1066 2014, 1302 2015) (free-to-air TV, 684 2013, 717 2014, 948 2015)

Fixed line market: trend in participation, by age

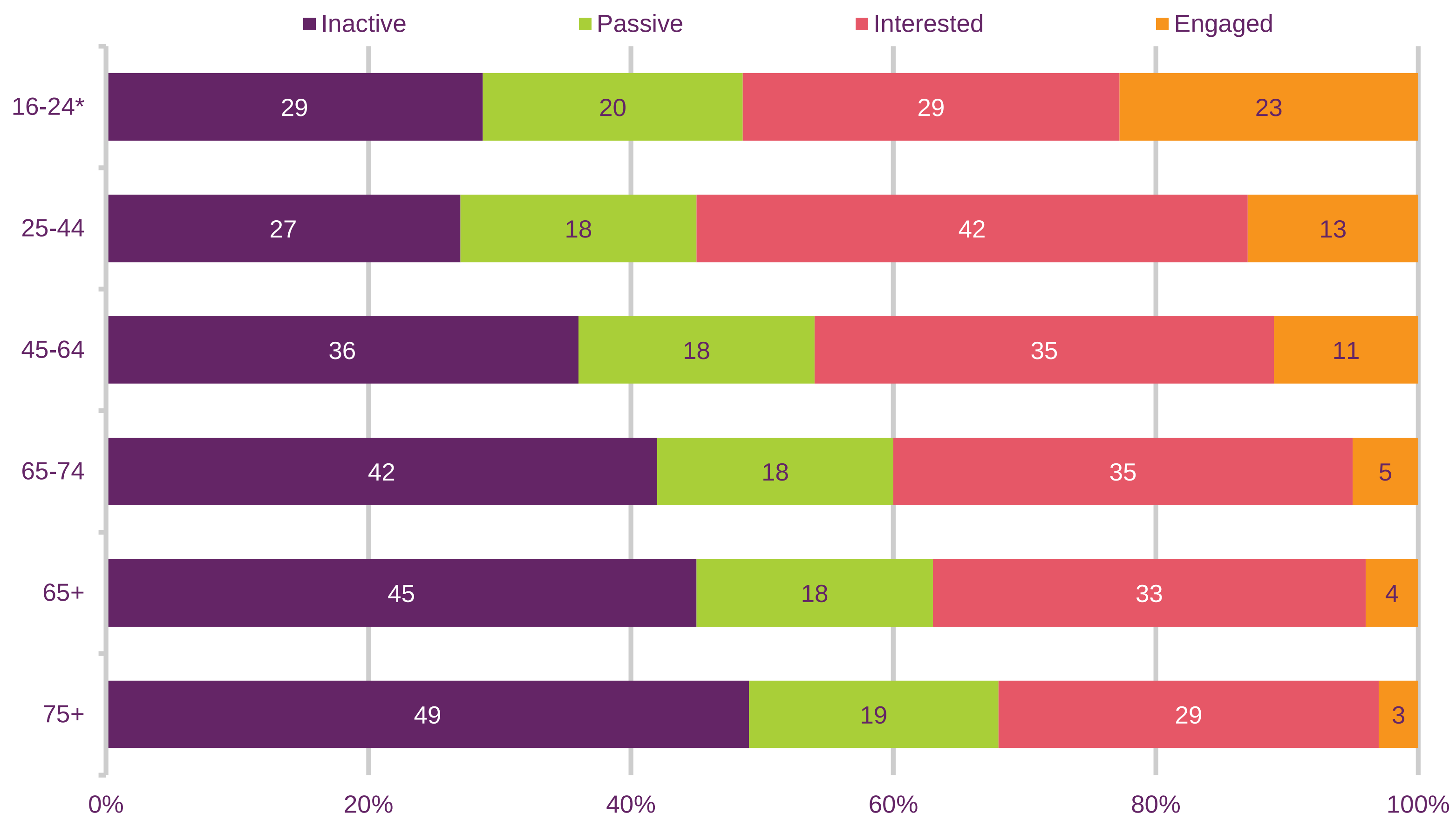
Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2015
Base: All adults aged 16+ who are the decision-maker for fixed line (16-24, 58; 24-44, 582; 45-64, 872; 65-74, 375; 65+, 669; 75+, 294)
*Note: low base size (under 100), treat as indicative only

Fixed broadband market: trend in participation, by age



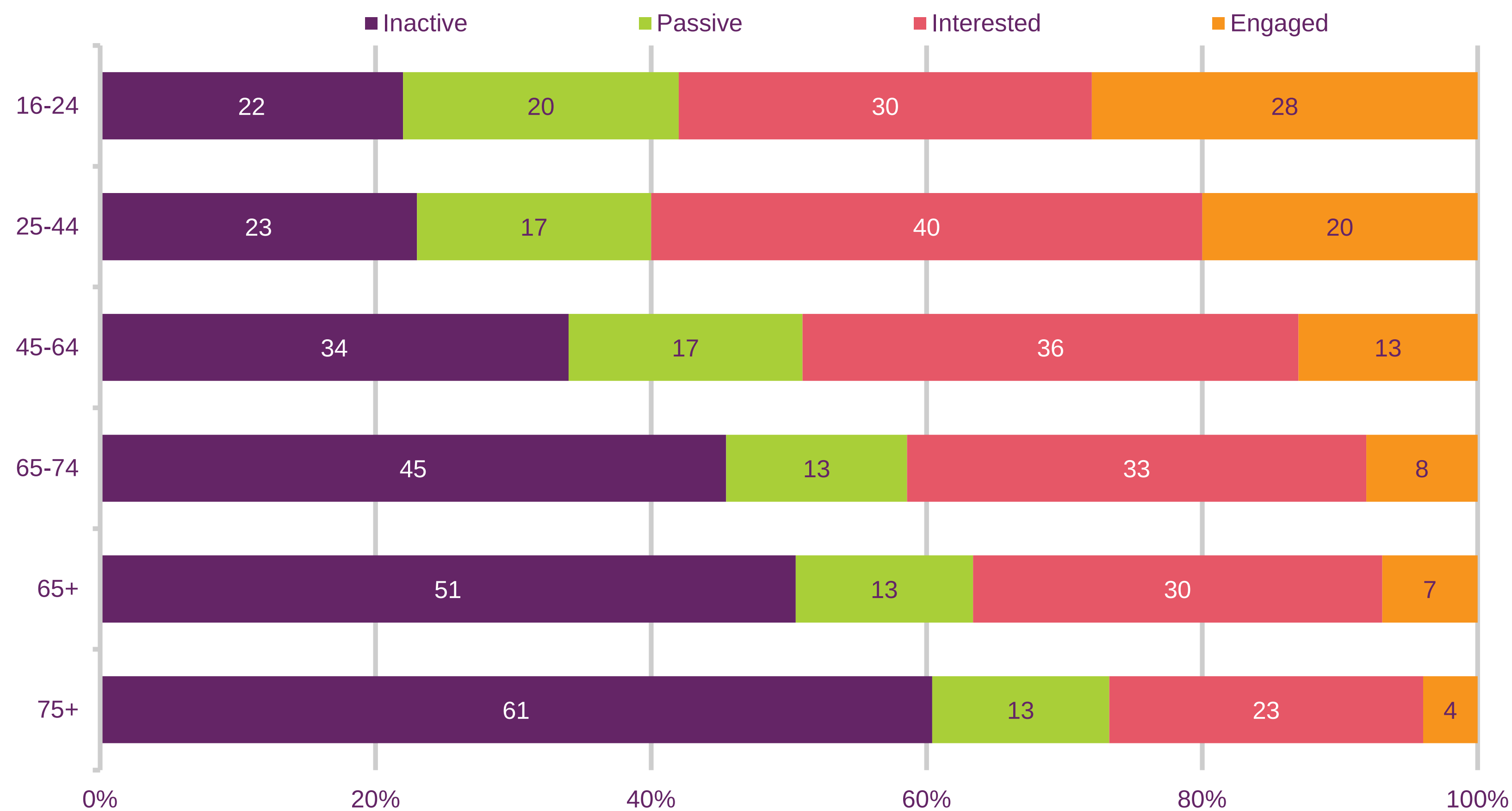
Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2015
Base: All adults aged 16+ who are the decision-maker for broadband (16-24, 75; 24-44, 590; 45-64, 804; 65-74, 267; 65+, 391; 75+, 124)
*Note: low base size (under 100), treat as indicative only

Digital TV market: trend in participation, by age



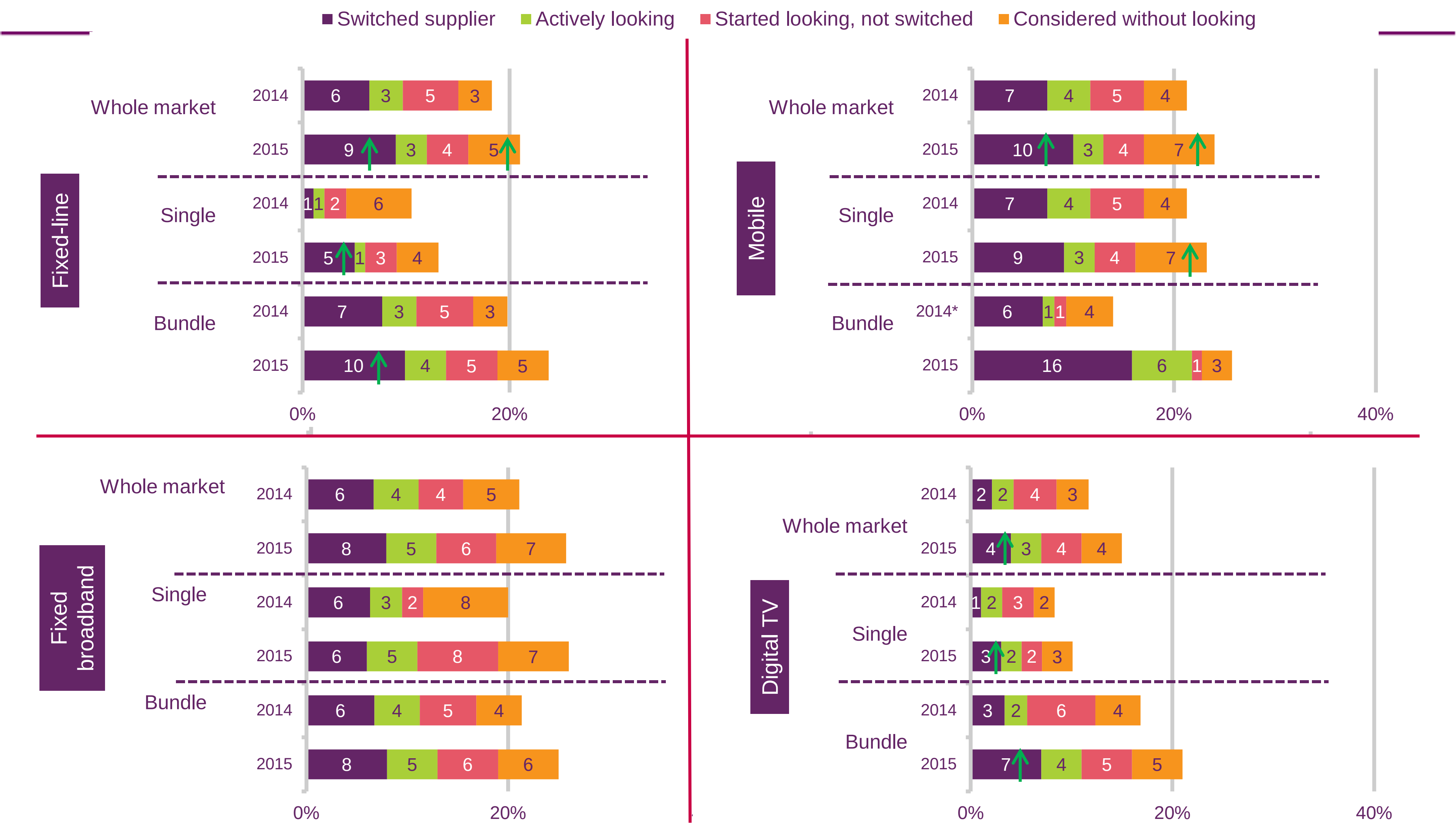
Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2015
Base: All adults aged 16+ who are the decision-maker for digital TV (16-24, 75; 24-44, 619; 45-64, 899; 65-74, 368; 65+, 644; 75+, 276)
*Note: low base size (under 100), treat as indicative only

Mobile market: trend in participation, by age



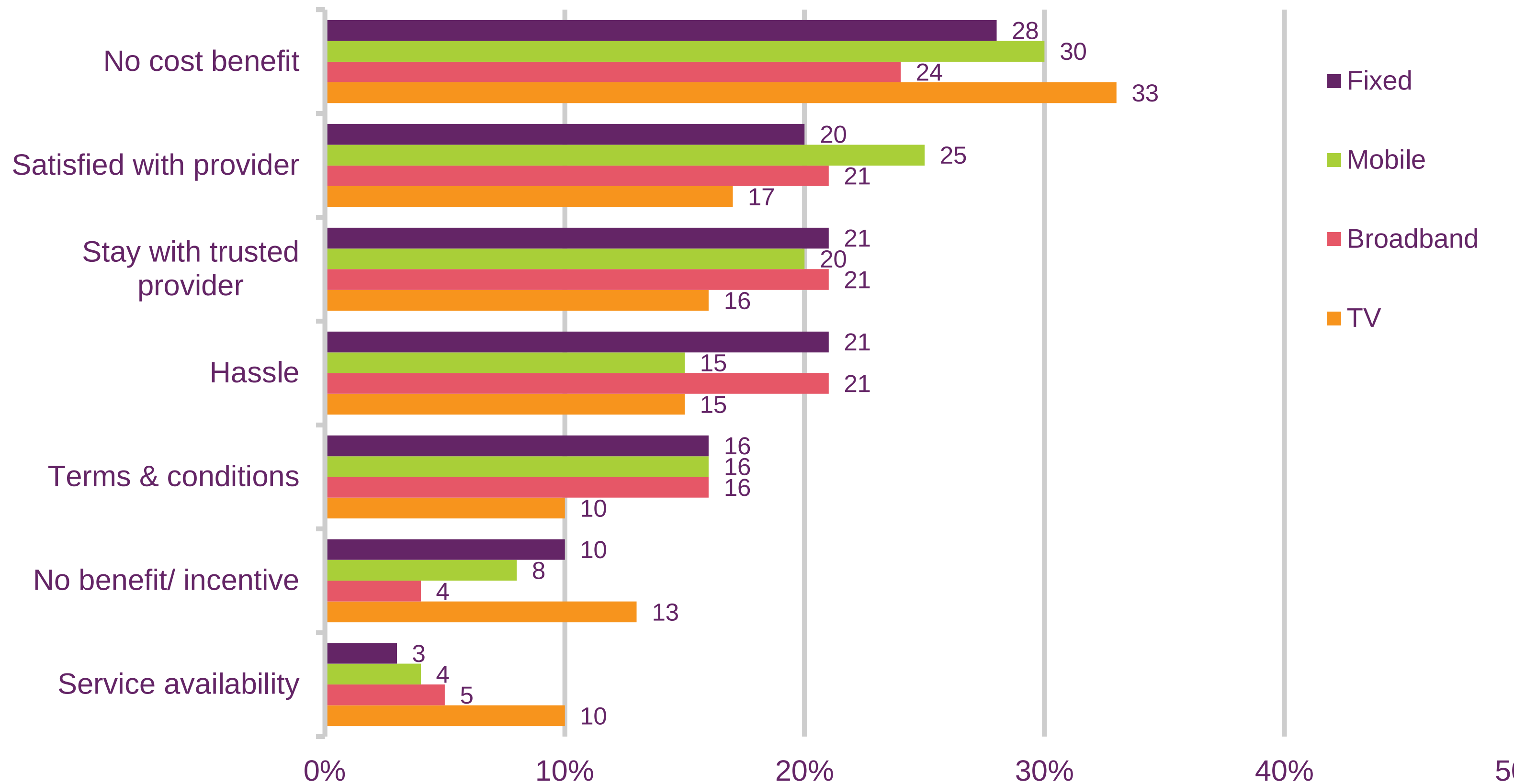
Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2015
Base: All adults aged 16+ who are the decision-maker for mobile (16-24, 298; 24-44, 826; 45-64, 960; 65-74, 336; 65+, 503; 75+, 167)

Level of activity in the communications markets in the past 12 months



Source: Ofcom decision making survey carried out by Saville Rossiter-Base in July to August 2014 and 2015
Base: All adults aged 16+ who are the decision maker for fixed line (whole market, 1736 2014, 2199 2015) (single purchase, 409 2014, 646 2015) (service in bundle, 1327 2014, 1553 2015), mobile (whole market, 1679 2014, 2609 2015) (single purchase, 1614 2014, 2461 2015) (service in bundle, *65 2014, 148 2015), broadband (whole market, 1464 2014, 1877 2015) (single purchase, 149 2014 305 2015) (service in bundle, 1315 2014 1572 2015), digital TV (whole market, 1723 2014, 2251 2015) (single purchase, 1088 2014, 1400 2015) (service in bundle, 635 2014 851 2015). *Caution: Low base treat as indicative only.

Reasons why not interested in changing provider – among those who do not agree their provider is the best on the market



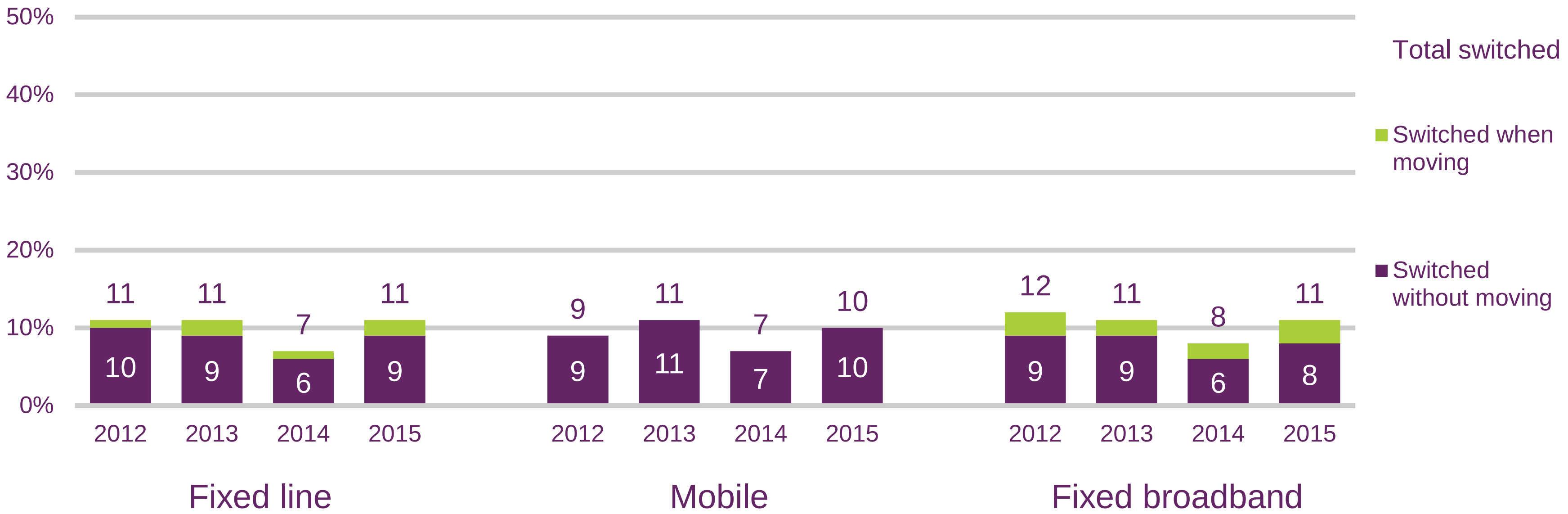
Source: Ofcom decision making survey carried out by Saville Rossiter-Base in July to August 2015
Base: All adults aged 16+ who are the decision maker for each service who have not switched or considered switching providers in the last 12 months, are not looking for a new provider and do not agree their provider is the best on the market (Fixed line, 751) (Mobile, 862) (Broadband, 561) (Digital TV, 766).
QL9d/QM9d/QI9d/QT9d. Why are you not interested in changing the company that provides your [home landline service/ mobile phone network service/ fixe broadband service/ television service?

Switching in communications markets in the past 12 months, year on year comparison

Switched in 12 months to Sept.	Sept 2015		Sept 2014		Sept 2013	
	Total	Excl. home move	Total	Excl. home move	Total	Excl. home move
Fixed line	11% ↑	9% ↑	7% ↓	6% ↓	11%	9%
Mobile	10% ↑		7% ↓		11%	
Broadband	11%	8%	8%	6%	11%	9%
Total TV	6% ↑	4% ↑	3%	2%	4%	3%
Pay TV	7% ↑	5% ↑	3%	2%	5%	4%
Free-to-air TV	5% ↑	3%	2%	1%	2%	1%

Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2015, 2014 and 2013
Base: All adults aged 16+ who are the decision-maker for fixed line (1596 2013, 1736 2014, 2199 2015) mobile (1718 2013, 1679 2014, 2609 2015), broadband (1291 2013, 1464 2014, 1877 2015), digital TV (1592 2013, 1723 2014, 2251 2015), (pay TV, 908 2013, 1066 2014, 1302 2015) (free-to-air TV, 684 2013, 717 2014, 948 2015)
QL7/QM7/QI7/QT7. Have you or your household ever CHANGED the company that provides your home landline service and/ or line rental?/ your mobile phone network supplier?/ your internet service provider?/ your main television service?

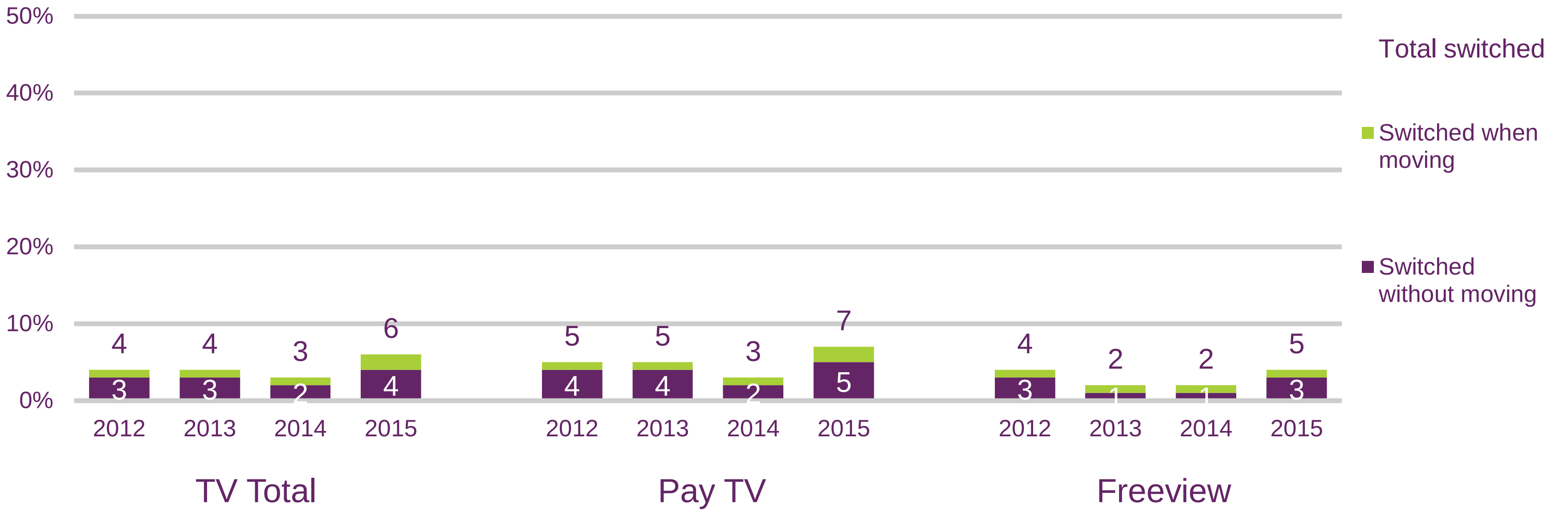
Switching in telecommunications markets in the past 12 months, year on year comparison



Note: These data are based on each market as a whole i.e. include standalone purchasers and bundlers.

Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2015
Base: All adults aged 16+ who are the decision-maker for fixed line (2015, 2199) mobile (2015, 2609), broadband (2015, 1877)
QL7/QM7/QI7. Have you or your household ever CHANGED the company that provides your home landline service and/ or line rental?/ your mobile phone network supplier?/ your internet service provider? NQL7a/NQI7a. Did you make this change of provider at the same time as moving home?

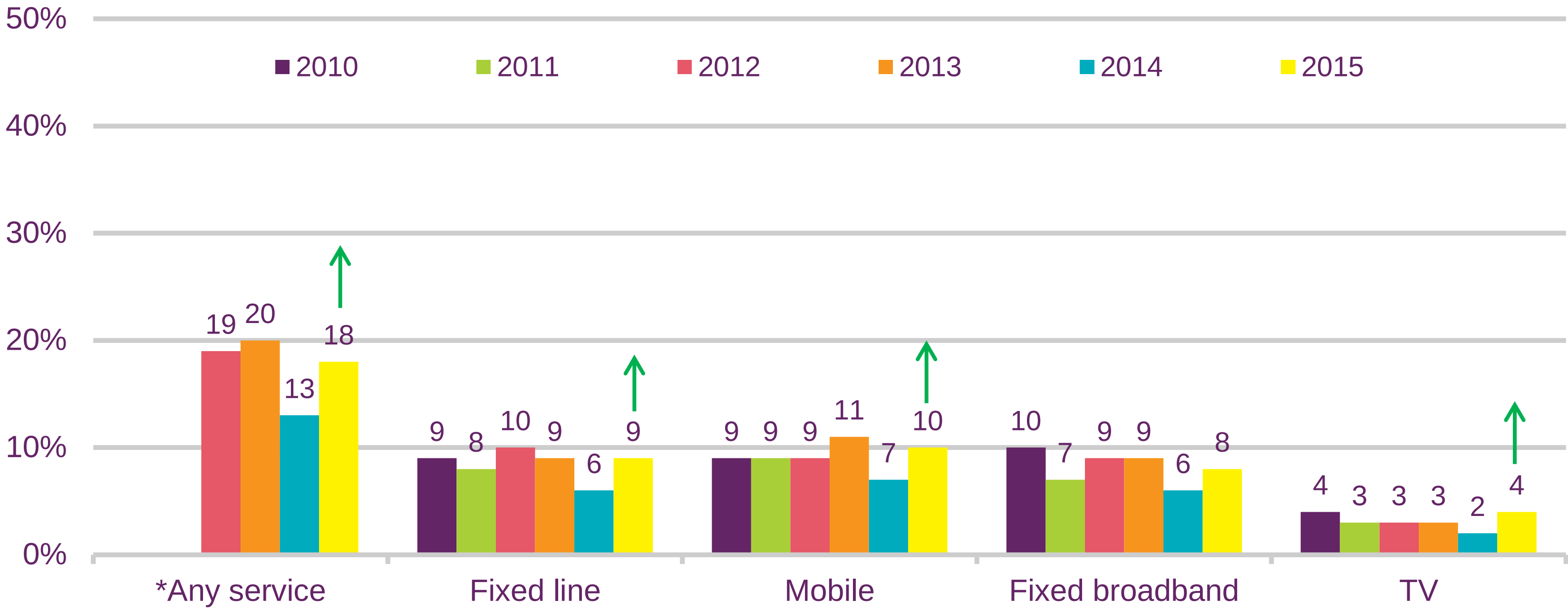
Switching in TV markets in the past 12 months, year on year comparison



Note: These data are based on each market as a whole i.e. include standalone purchasers and bundlers.

Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2015
Base: All adults aged 16+ who are the decision-maker for digital TV (2015, 2251), pay TV (2015, 1302), Freeview (2015, 948)
QT7. Have you or your household ever CHANGED the company that provides your main television service? NQT7a. Did you make this change of provider at the same time as moving home?

Switching in communications markets in the past 12 months, year on year comparison



Note: These data are based on each market as a whole i.e. include standalone purchasers and bundlers.

Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2015
Base: All adults aged 16+ who are the decision-maker for fixed line (2015, 2199) mobile (2015, 2609), broadband (2015, 1877), digital TV (2015, 2251)
Note: Data from 2010 to 2011 are based on standalone purchaser data, 2012 to 2015 data is based on total market. Therefore, trend data prior to 2012 are not directly comparable and should be viewed as indicative only.
QL7/QM7/QI7/QT7. Have you or your household ever CHANGED the company that provides your home landline service and/ or line rental?/ your mobile phone network supplier?/ your internet service provider?/ your main television service?

Switching among bundlers in the past 12 months

% switched at least one service within bundle in last 12 months	Sept. 2015		Sept. 2014		Sept. 2013		Sept. 2012	
	Total	Excl. home move	Total	Excl. home move	Total	Excl. home move	Total	Excl. home move
Dual play	12%	11%	7%	7%	10%	8%	12%	11%
Triple play	12%	10%	7%	6%	10%	8%	10%	8%

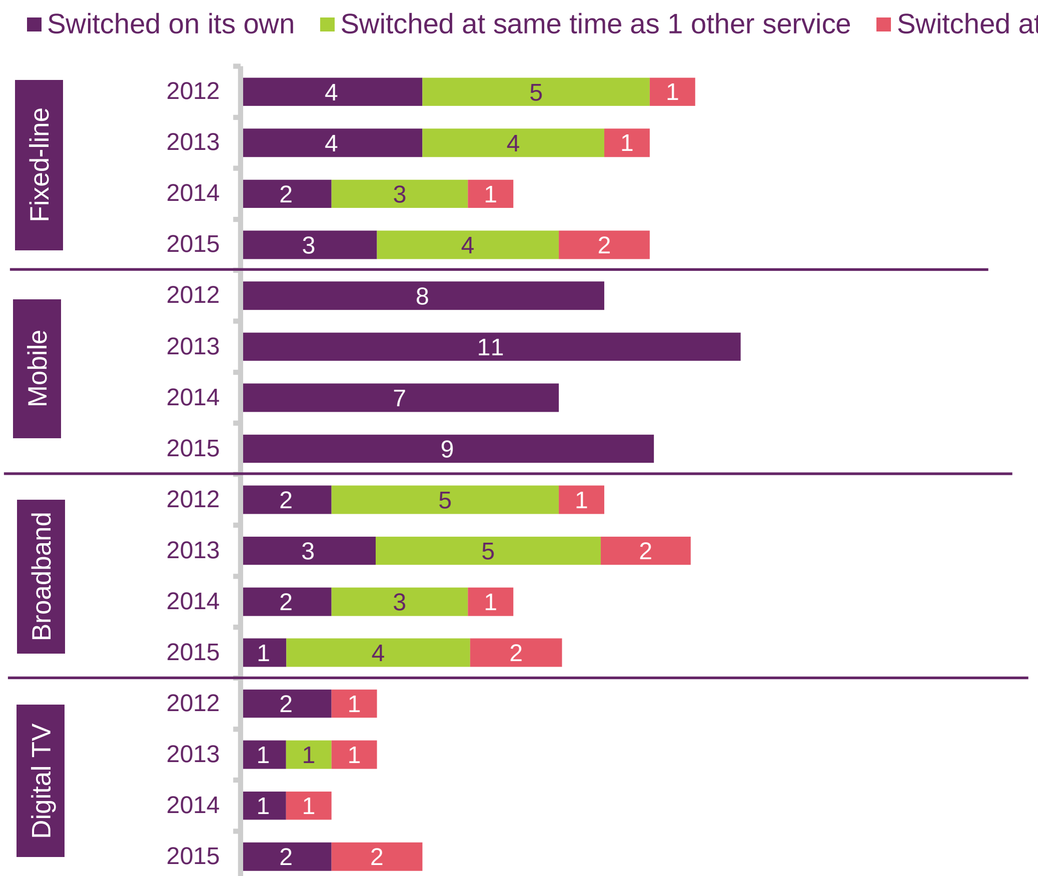
Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2015, 2014, 2013 and 2012
Base: All adults aged 16+ who are the decision-maker for a bundle of services (2012, dual 561, triple 413) (2013, dual 621, triple 405) (2014, dual 734, triple, 656) (2015, dual 645, triple 532)
QL7/QI7/QT7. Have you or your household ever CHANGED the company that provides your home landline service and/ or line rental?/ your internet service provider?/ your main television service? NQL7e/ NQI7e/ NQT7d. Did you receive any OTHER services from (PREVIOUS SERVICE PROVIDER) as well as your (service) at the time you switched to (CURRENT SERVICE PROVIDER)? IF YES: Which other services did you receive from (PREVIOUS PROVIDER)?

Switching in communications markets in the past 12 months, year on year comparison

Switched in 12 months to Sept.	Sept 2015		Sept 2014		Sept 2013	
	Total	Excl. home move	Total	Excl. home move	Total	Excl. home move
Fixed line	11% ↑	9% ↑	7% ↓	6% ↓	11%	9%
Mobile	10% ↑		7% ↓		11%	
Broadband	11%	8%	8%	6%	11%	9%
Total TV	6% ↑	4% ↑	3%	2%	4%	3%
Pay TV	7% ↑	5% ↑	3%	2%	5%	4%
Free-to-air TV	5% ↑	3%	2%	1%	2%	1%
Dual play	12%	11%	7%	7%	10%	8%
Triple play	11%	10%	7%	6%	10%	8%

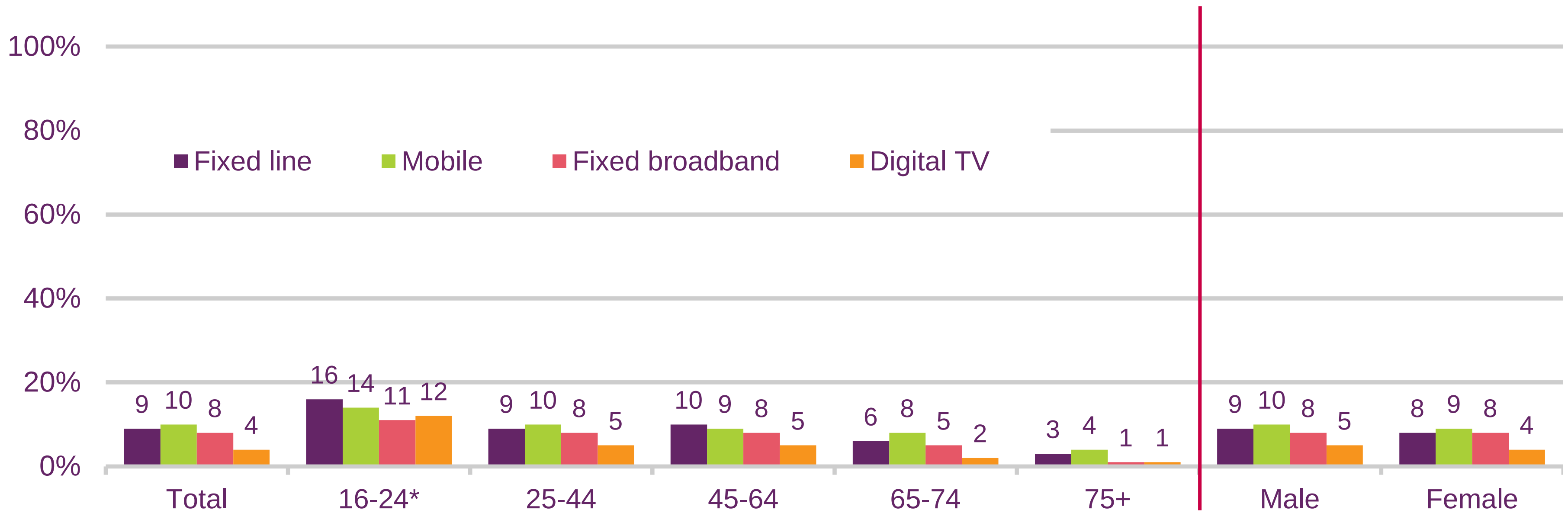
Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2015, 2014 and 2013
Base: All adults aged 16+ who are the decision-maker for fixed line (1596 2013, 1736 2014, 2199 2015) mobile (1718 2013, 1679 2014, 2609 2015), broadband (1291 2013, 1464 2014, 1877 2015), digital TV (1592 2013, 1723 2014, 2251 2015), (pay TV, 908 2013, 1066 2014, 1302 2015) (free-to-air TV, 684 2013, 717 2014, 948 2015), bundle of services (2013, dual 621, triple 405) (2014, dual 734, triple, 656) (2015, dual 645, triple 532)
QL7/QM7/QI7/QT7. Have you or your household ever CHANGED the company that provides your home landline service and/ or line rental?/ your mobile phone network supplier?/ your internet service provider?/ your main television service? NQL7e/ NQI7e/ NQT7d. Did you receive any OTHER services from (PREVIOUS SERVICE PROVIDER) as well as your (service) at the time you switched to (CURRENT SERVICE PROVIDER)? IF YES: Which other services did you receive from (PREVIOUS PROVIDER)?

Switching multiple services in communications markets in the past 12 months, by total market



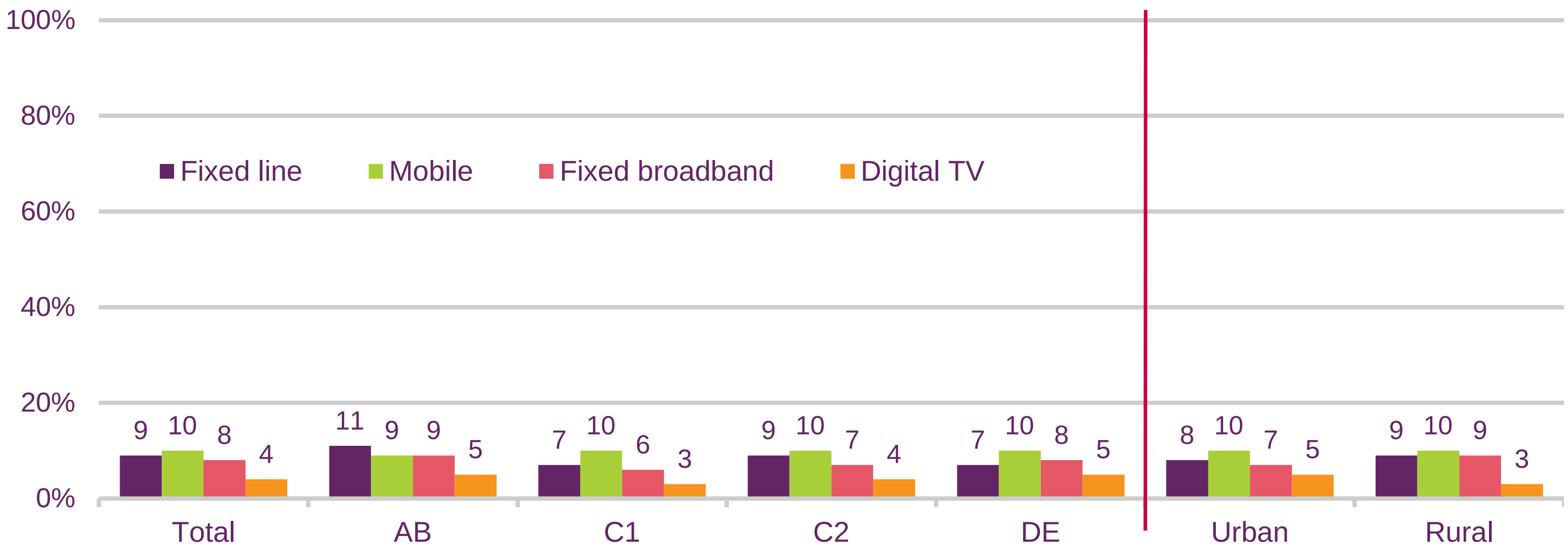
Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2015
Base: All adults aged 16+ who are the decision-maker for fixed line (2015, 2199) mobile (2015, 2609), broadband (2015, 1877), digital TV (2015, 2251)
QB23. You mentioned earlier that you have switched supplier for the following services in the last 12 months. Did you switch any of these services at the same time?
Note: no data for switching mobile at the same time as one other service or at the same time as two or more services due to no respondents falling into this category

Switched provider in past 12 months, by age and gender



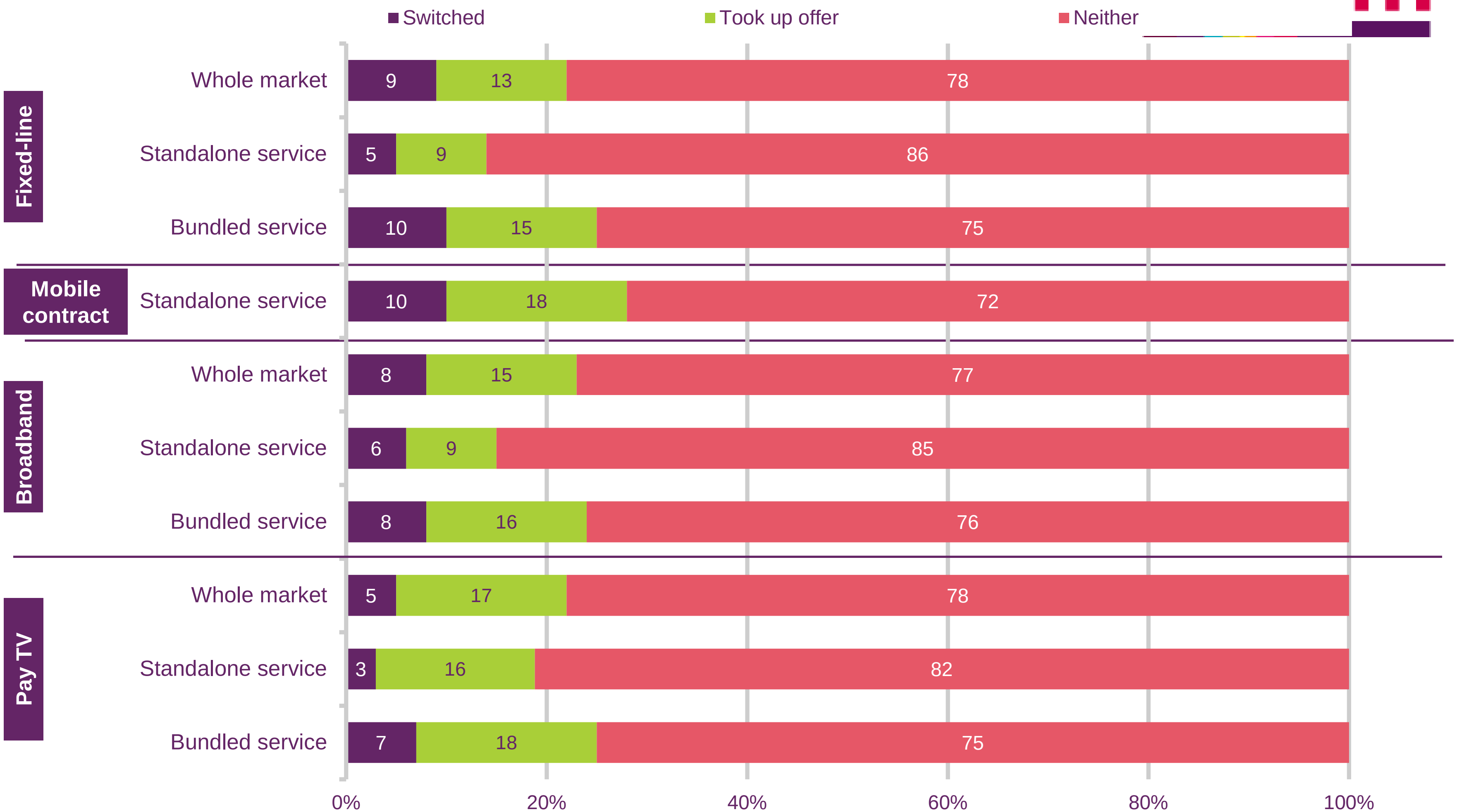
Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2015
Base: All adults aged 16+ who are the decision-maker for fixed line (2015, 2199) mobile (2015, 2609), broadband (2015, 1877), digital TV (2015, 2251)
QL7/QM7/QI7/QT7. Have you or your household ever CHANGED the company that provides your home landline service and/ or line rental?/ your mobile phone network supplier?/ your internet service provider?/ your main television service?
*Caution: Low base size for 16-24 year olds for fixed line, broadband and TV, treat as indicative only

Switched provider in past 12 months, by socio-economic group and urbanity



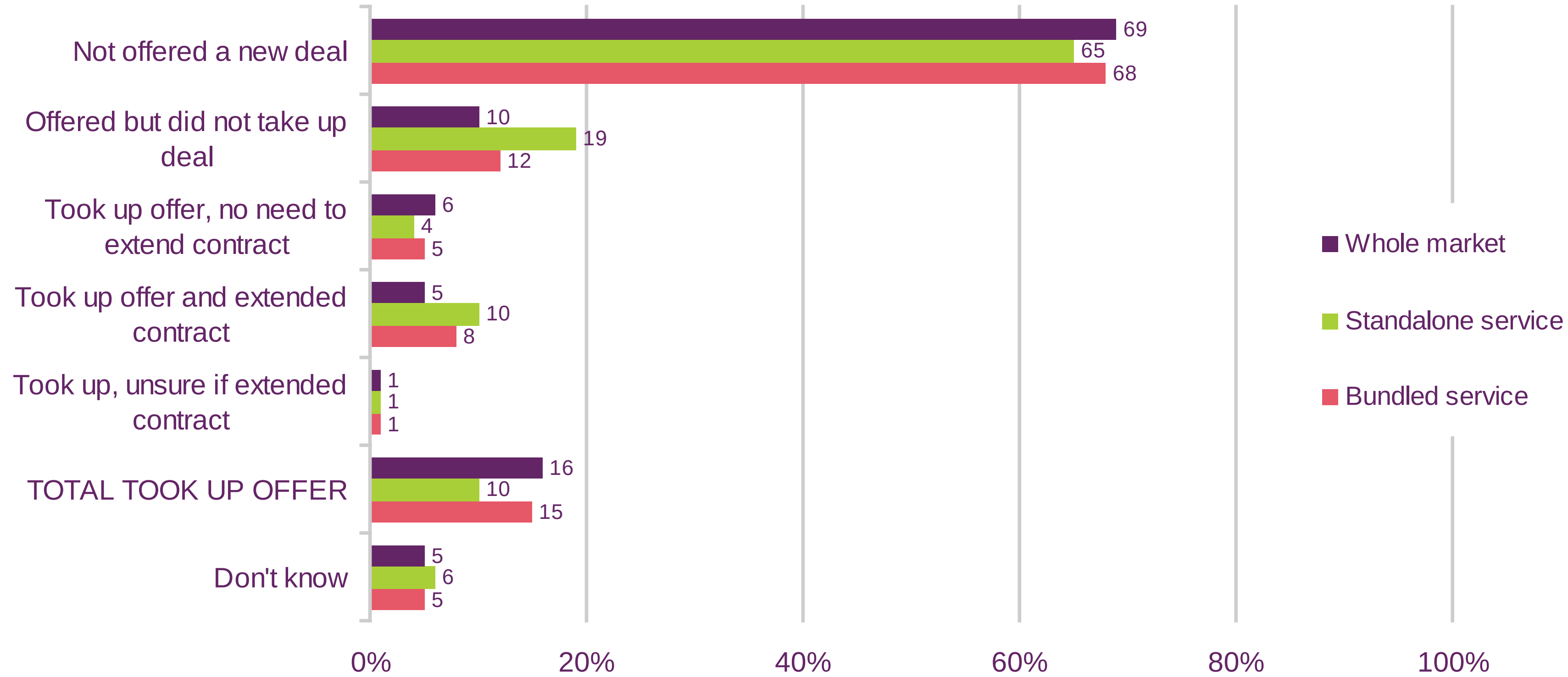
Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2015
Base: All adults aged 16+ who are the decision-maker for fixed line (2015, 2199) mobile (2015, 2609), broadband (2015, 1877), digital TV (2015, 2251)
QL7/QM7/QI7/QT7. Have you or your household ever CHANGED the company that provides your home landline service and/ or line rental?/ your mobile phone network supplier?/ your internet service provider?/ your main television service?

Level of activity in the communications markets in the past 12 months – switched or took up offer of extra/ improved services



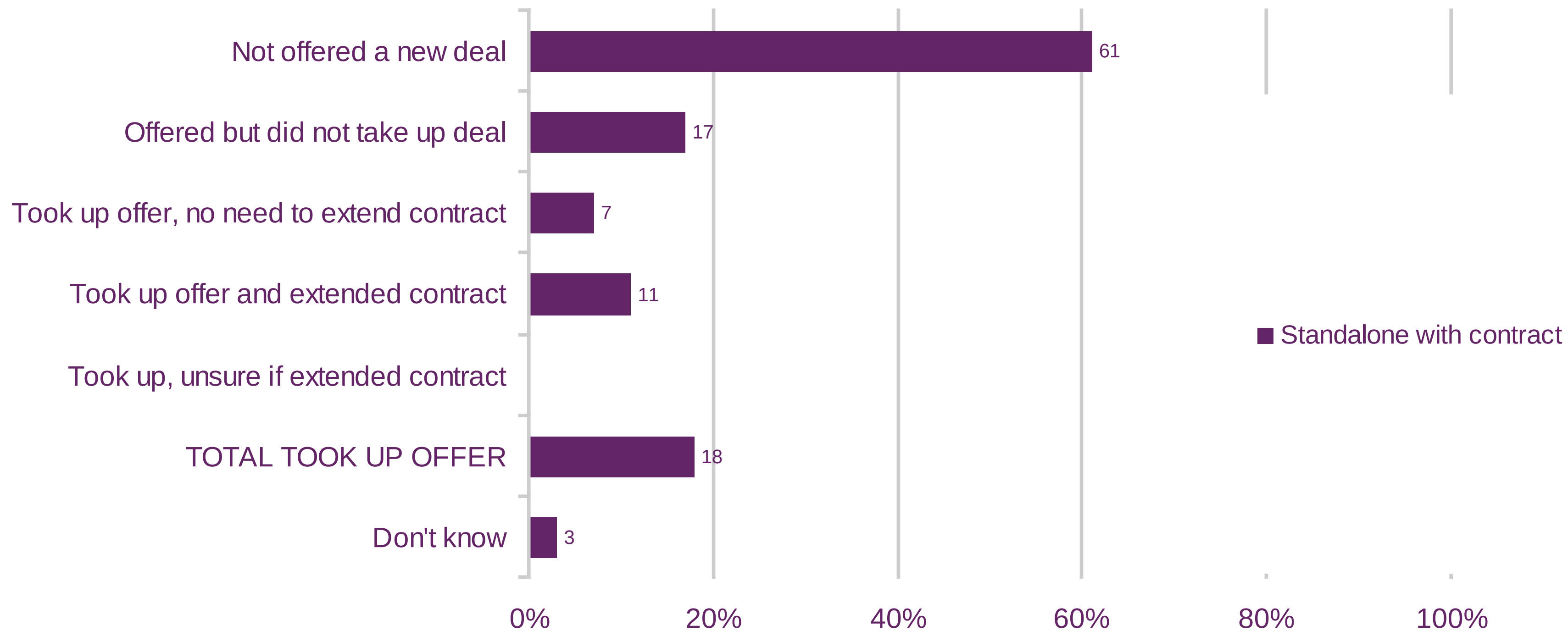
Source: Ofcom decision making survey carried out by Saville Rossiter-Base in July to August 2015
Base: All adults aged 16+ who are the decision maker for fixed line (whole market, 2199 2015) (single purchase, 646 2015) (service in bundle, 1553 2015), mobile with contract (single purchase, 1724 2015), broadband (whole market, 1877 2015) (single purchase, 305 2015) (service in bundle, 1572 2015), Pay TV (whole market, 1303 2015) (single purchase, 506 2015) (service in bundle, 797 2015).
QL7/QM7/QI7/QT7. Have you or your household ever CHANGED the company that provides your home landline service and/ or line rental?/ your mobile phone network supplier?/ your internet service provider?/ your main television service? QL2f/QM3c/QI3e/QT3c. In the last 12 months, has (PROVIDER) offered you a new deal for your (SERVICE) with extra or improved services? Did you take up the offer?

Whether offered/ taken up deal and extended contract in last 12 months, in the fixed-line market



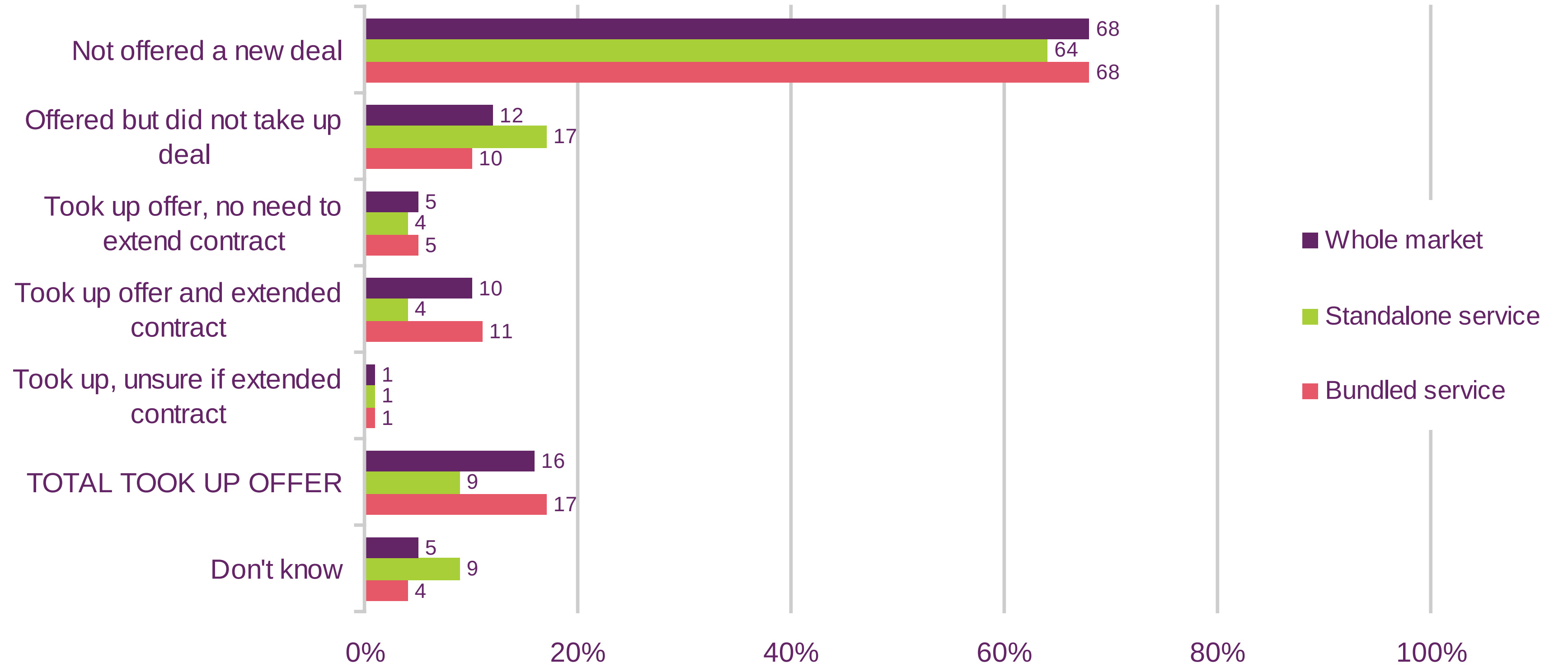
Source: Ofcom decision making survey carried out by Saville Rossiter-Base in July to August 2015
Base: All adults aged 16+ who are the decision maker for fixed-line (2015, 2199), as a standalone service (2015, 646), as part of a bundle of services (2015, 1553)
QL2F – In the last 12 months, has [PROVIDER] offered you a new deal for your [SERVICE] with extra or improved services? Did you take up the offer? Did this require you to extend your contract with [PROVIDER]?

Whether offered/ taken up deal and extended contract in last 12 months – in the mobile market



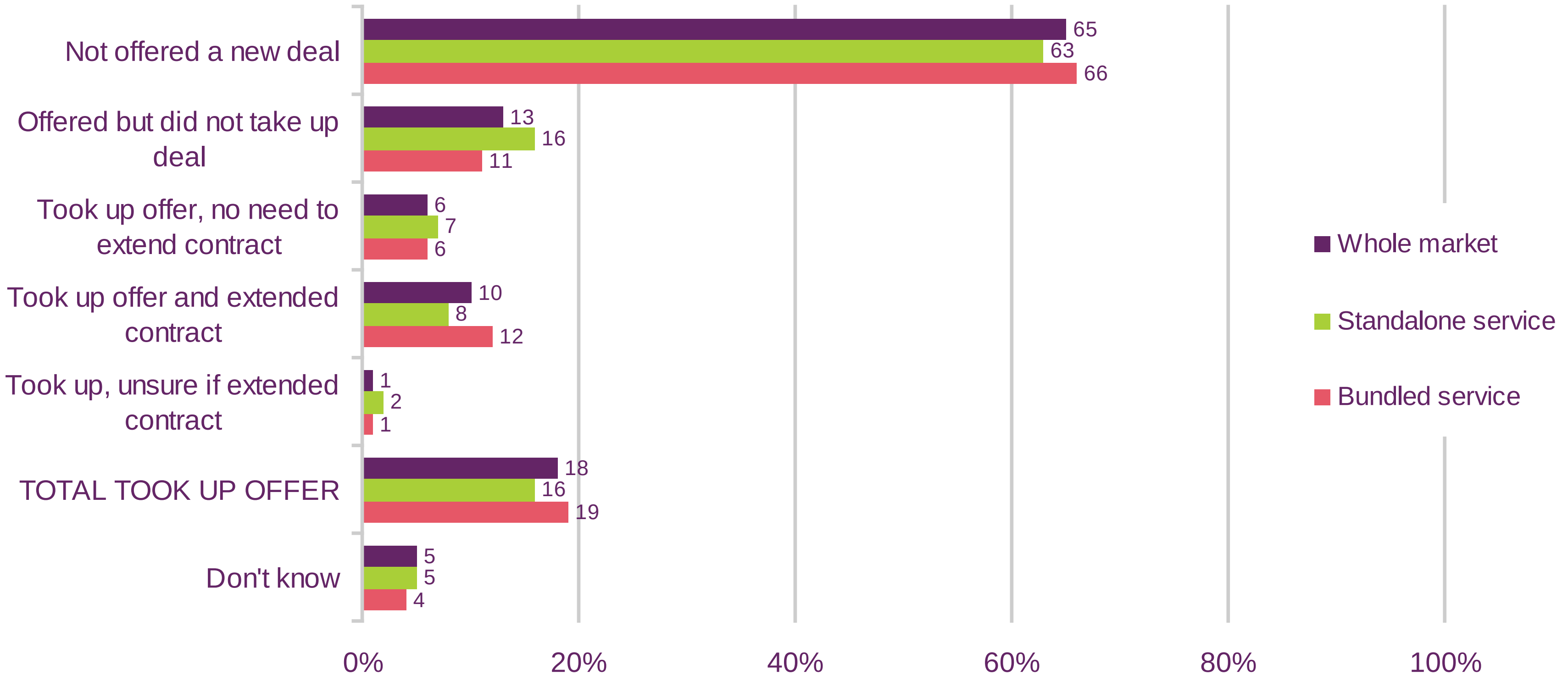
Source: Ofcom decision making survey carried out by Saville Rossiter-Base in July to August 2015
Base: All adults aged 16+ who are the decision maker for mobile as a standalone service and have a monthly contract package (2015, 1724)
QM3C – In the last 6 months, has [PROVIDER] offered you a new deal for your [SERVICE] with extra or improved services? Did you take up the offer? Did this require you to extend your contract with [PROVIDER]?
*Caution: Low base, treat as indicative only

Whether offered/ taken up deal and extended contract in last 12 months – in the fixed broadband market



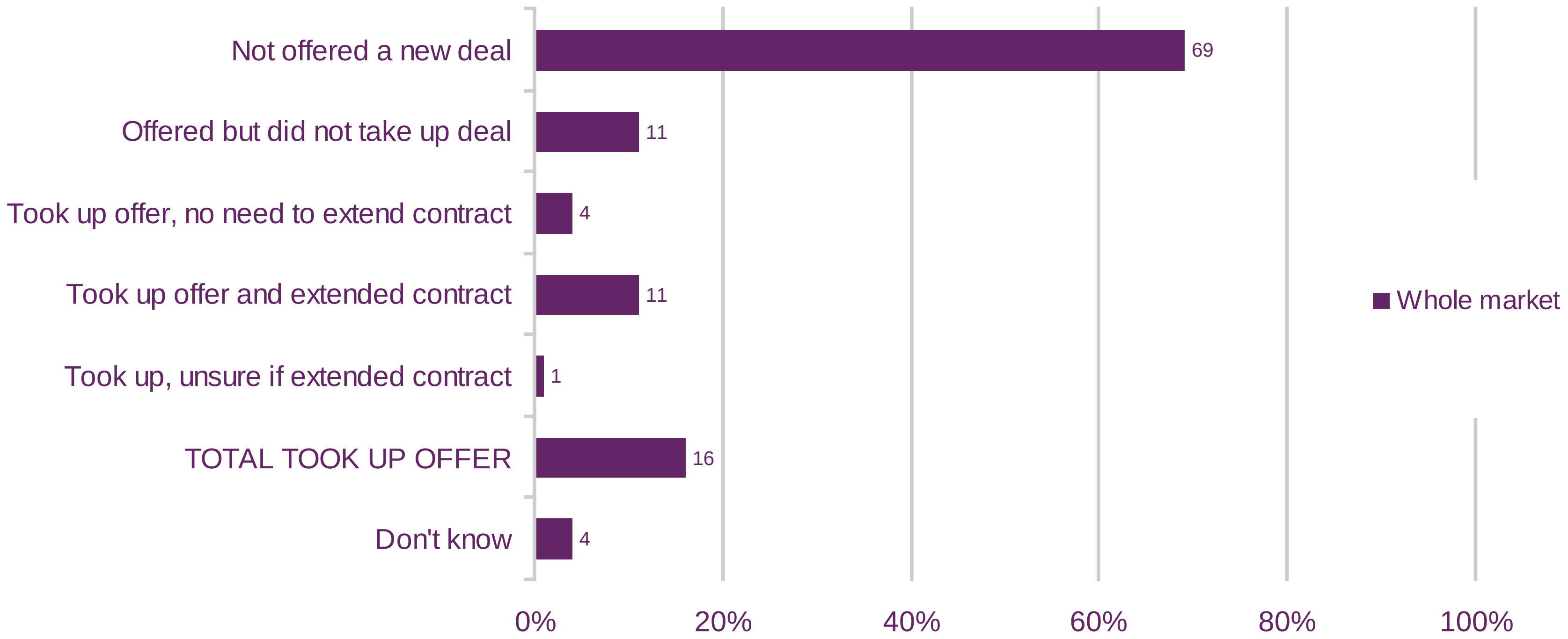
Source: Ofcom decision making survey carried out by Saville Rossiter-Base in July to August 2015
Base: All adults aged 16+ who are the decision maker for fixed broadband (2015, 1877), as a standalone service (2015, 305), as part of a bundle of services (2015, 1572)
QI3E – In the last 12 months, has [PROVIDER] offered you a new deal for your [SERVICE] with extra or improved services? Did you take up the offer? Did this require you to extend your contract with [PROVIDER]?

Whether offered/ taken up deal and extended contract in last 12 months – in the pay TV market



Source: Ofcom decision making survey carried out by Saville Rossiter-Base in July to August 2015
Base: All adults aged 16+ who are the decision maker for digital Pay TV (2015, 1303), as a standalone service (2015, 506), as part of a bundle of services (2015, 797)
QT3C – In the last 12 months, has [PROVIDER] offered you a new deal for your [SERVICE] with extra or improved services? Did you take up the offer? Did this require you to extend your contract with [PROVIDER]?

Whether offered/ taken up deal and extended contract in last 12 months – in the bundle market



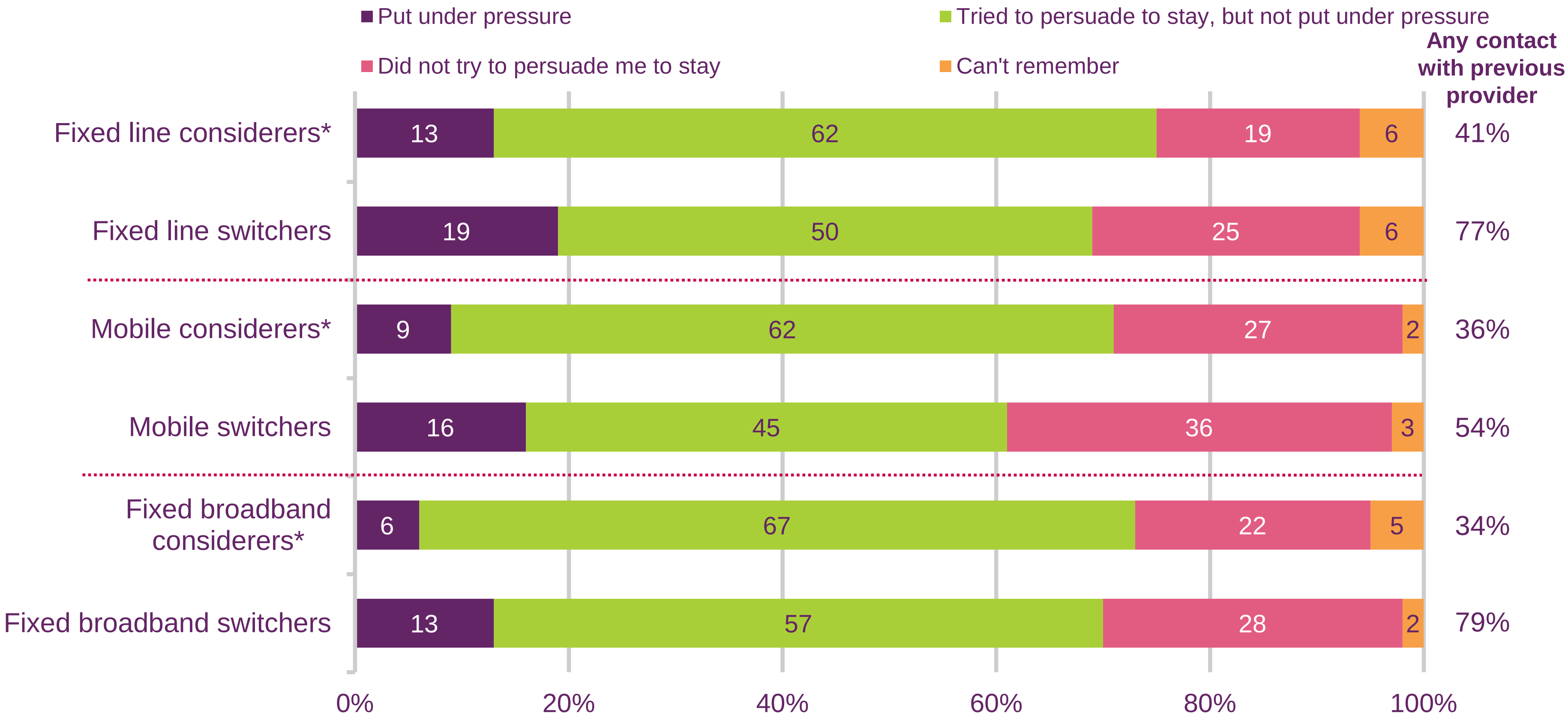
Source: Ofcom decision making survey carried out by Saville Rossiter-Base in July to August 2015
Base: All adults aged 16+ who are the decision maker for a package of services (2015, 1297)
QB2F – In the last 12 months, has [PROVIDER] offered you a new deal for your WHOLE package with extra or improved services? Did you take up the offer? Did this require you to extend your contract with [PROVIDER]?

Reasons for switching provider – 2015 and 2013

	Fixed-line		Mobile		Fixed broadband		TV service	
	2015	2013	2015	2013	2015	2013	2015	2013*
For a better/ cheaper price/ deal	61%	62%	64%	54%	55%	56%	73%	54%
Poor service from previous supplier	28%	25%	18%	20%	29%	29%	14%	23%
To bundle two or more services together with one supplier	12%	15%	2%	2%	6%	13%	14%	5%
For better reception/ signal			19%	15%				
Good experience with new supplier for other services previously	4%	11%	3%	1%	3%	0%	4%	4%
Faster broadband speeds					15%	15%		
Better range of tariffs/ price plans	4%	11%	6%	1%	3%	3%		
For a better/ wider choice of channels							10%	18%
Better choice/ price of phone handsets			11%	13%				
New supplier recommended by someone I know	1%	2%	3%	4%	1%	1%	1%	1%
To get a 4G service			4%	5%				

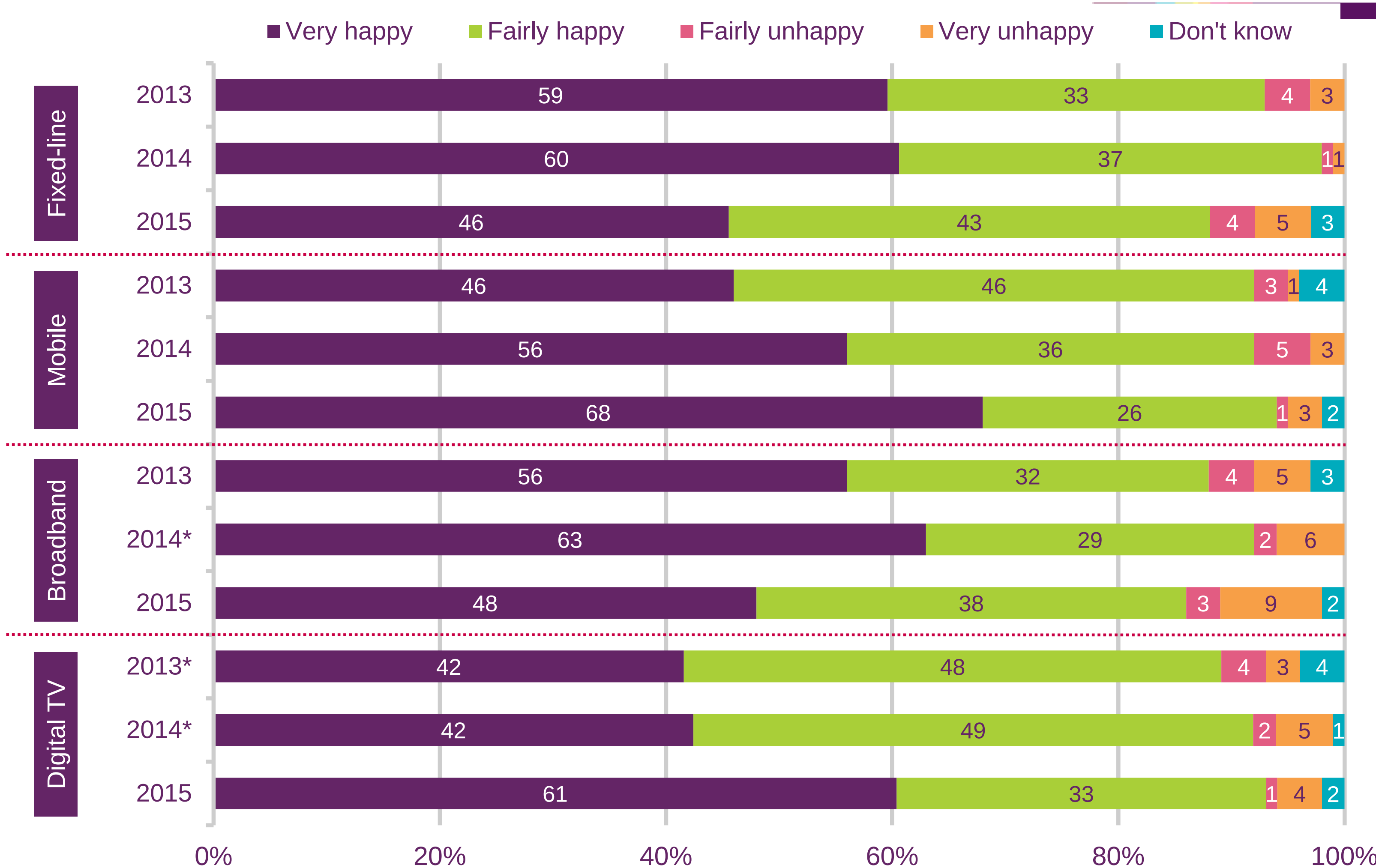
Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2013 and 2015.
Base: All adults aged 16+ who are the decision-maker and have switched provider in the last 12 months for fixed line (223 2015, 159 2013), mobile (244 2015, 160 2013), broadband (180 2015, 141 2013), digital TV (113 2015, 54* 2013). QL23/QM25/QI26/QT25. Why did you switch from (PREVIOUS PROVIDER) to (PROVIDER)?
*Caution: Low base size, treat as indicative only

Attitudes towards provider discussions, among considerers and switchers, in the past 12 months



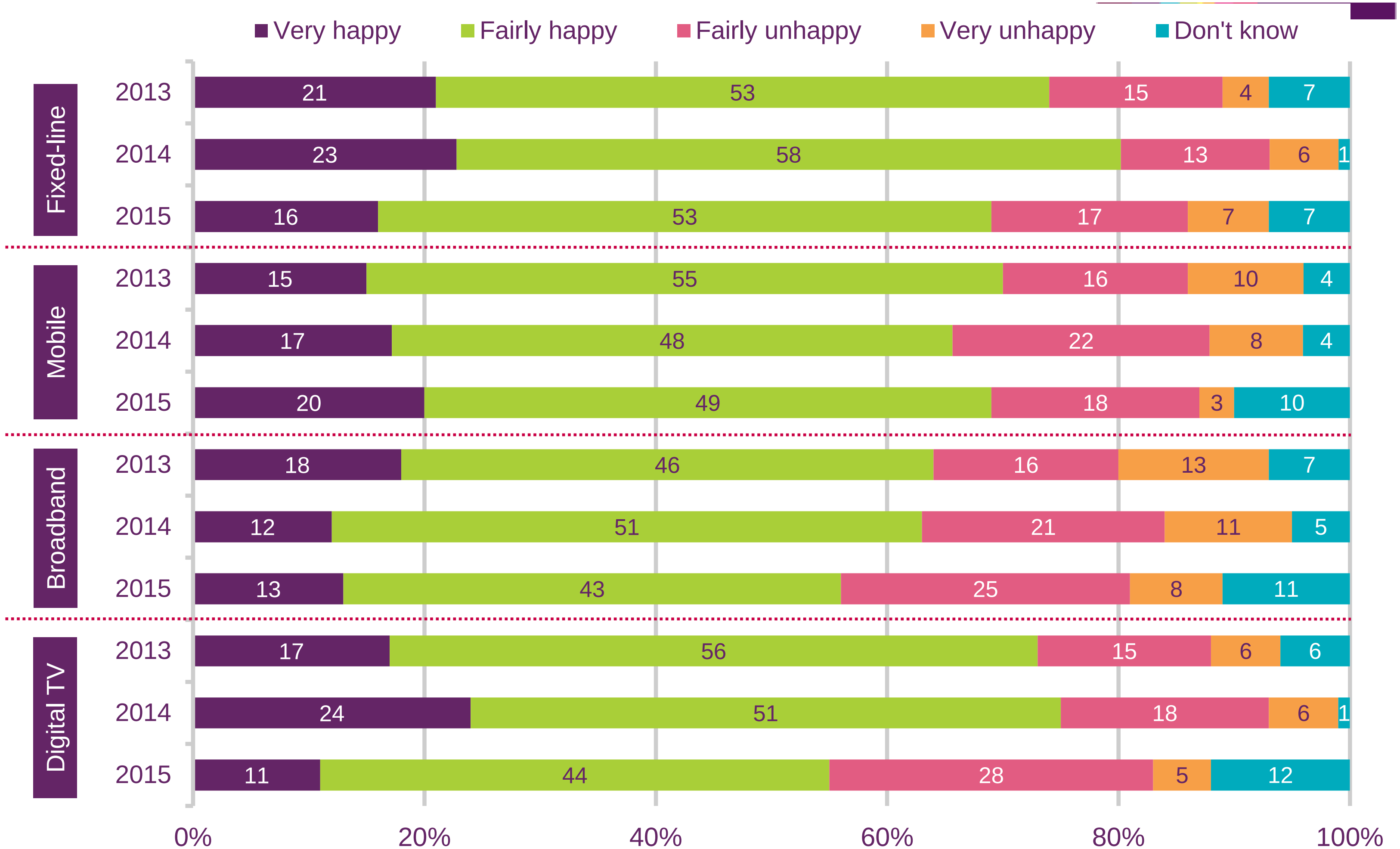
Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2015
Base: All adults aged 16+ who considered switching/ switched provider in the last 12 months and were in contact with their current/ previous supplier for fixed-line (81 considered, 167 switched), mobile (97 considered, 134 switched), fixed broadband (84 considered, 140 switched). Data excluding home-movers is not significantly different to that shown above.
QL34/QL27/QM36/QM29/QI37/QI30/QT29/QT36. Which of these statements best describes the contact you had with your current/ previous (SERVICE) supplier?
Summary data illustrating 'any contact' are based on all those who switched in the last 12 months.
*Caution: Low base, treat as indicative only

Attitudes to decision to switch in the past 12 months



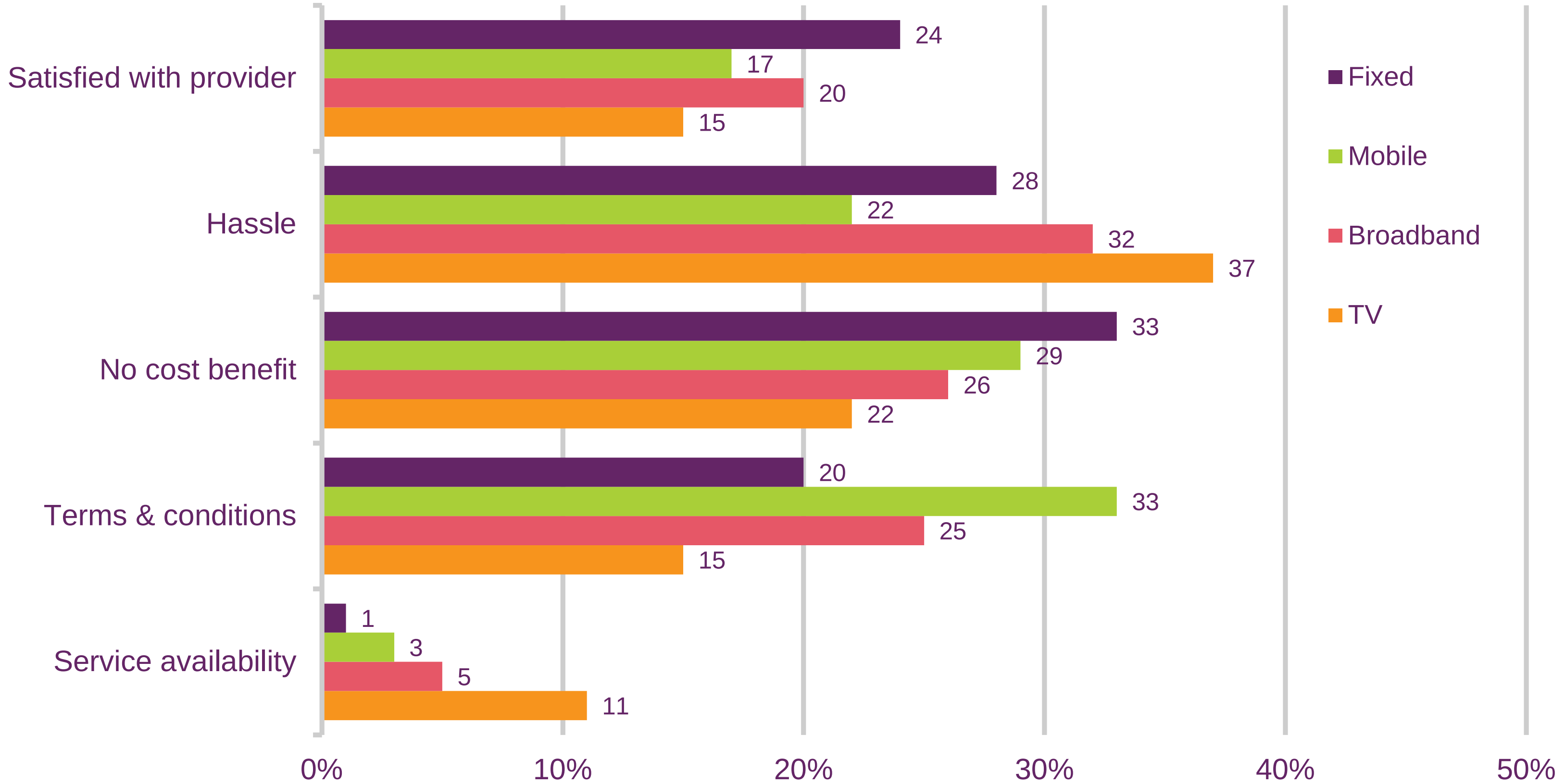
Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2015
Base: All adults aged 16+ who switched provider in the last 12 months for fixed-line (223 switched), mobile (244 switched), fixed broadband (180 switched), Digital TV (113 switched) *Caution: Low base, treat as indicative only.
QL30/QM32/QI33/QT32. Which of the following best describes how you feel about your decision to switch (SERVICE) provider? Would you say you are…

Attitudes to decision not to switch in the past 12 months



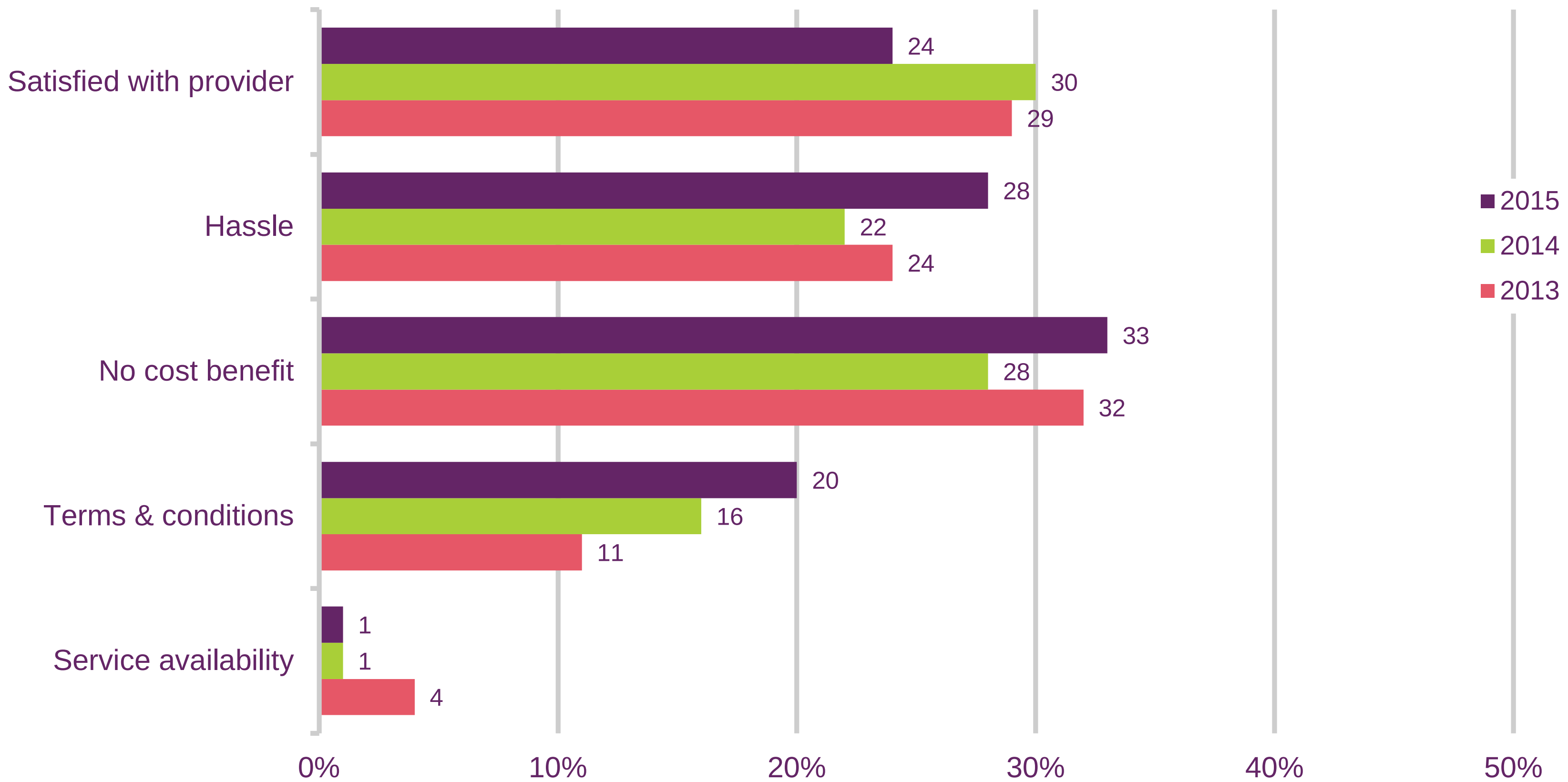
Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2015
Base: All adults aged 16+ who considered switching in the last 12 months for fixed-line (212 considered), mobile (259 considered), fixed broadband (239 considered), Digital TV (165 considered)
QL37/QM39/QI40/QT39. Which of the following best describes how you feel about your decision NOT to switch (SERVICE) provider? Would you say you are…

Reasons for considering, but not switching provider



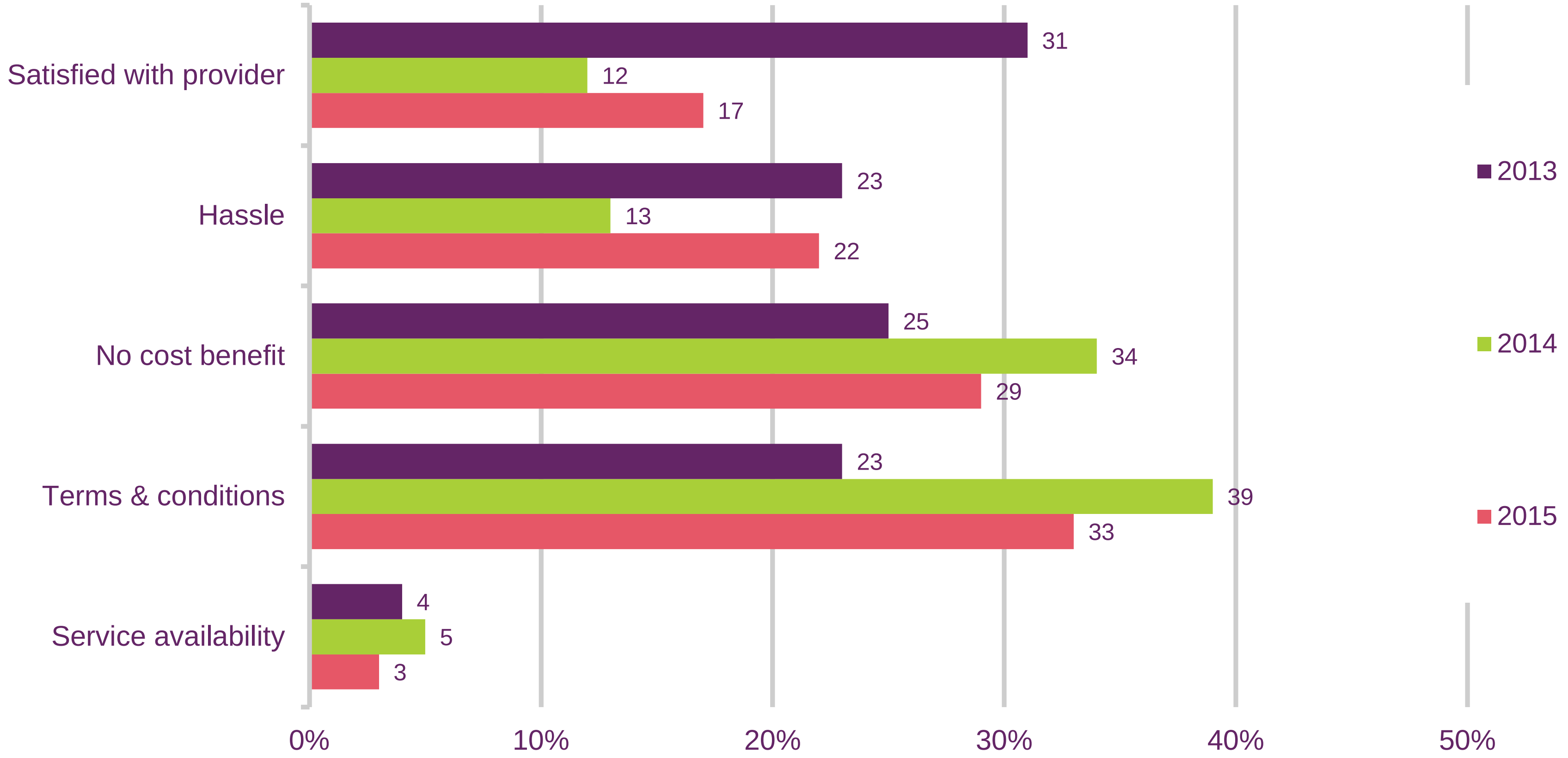
Source: Ofcom decision making survey carried out by Saville Rossiter-Base in July to August 2015
Base: All adults aged 16+ who are the decision maker for each service who have considered switching but did not switch (Fixed line, 189) (Mobile, 259) (Broadband, 239) (Digital TV, 165).
QL10a/QM10a/QI10a/QT10a. You mentioned that you considered switching in the last year, but didn't switch. Why did you decide not to switch to a different (SERVICE) supplier?

Reasons for considering but not switching provider in the fixed line market, 2013 – 2015



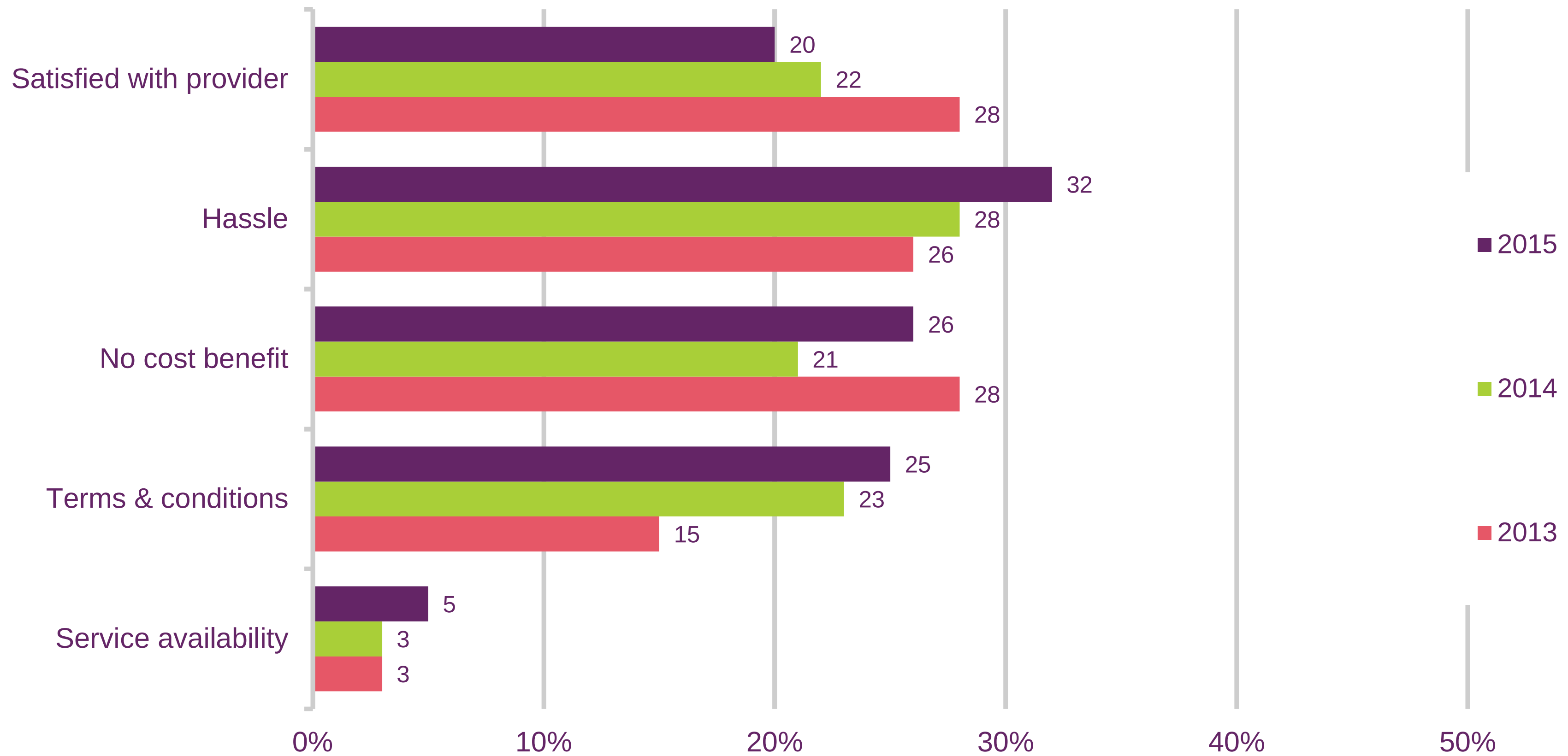
Source: Ofcom decision making survey carried out by Saville Rossiter-Base in July to August 2013, 2014 and 2015
Base: All adults aged 16+ who are the decision maker and have considered switching but did not switch in the fixed line market (2015 189, 2014 130, 2013 176)

Reasons for considering but not switching provider in the mobile market, 2013 - 2015



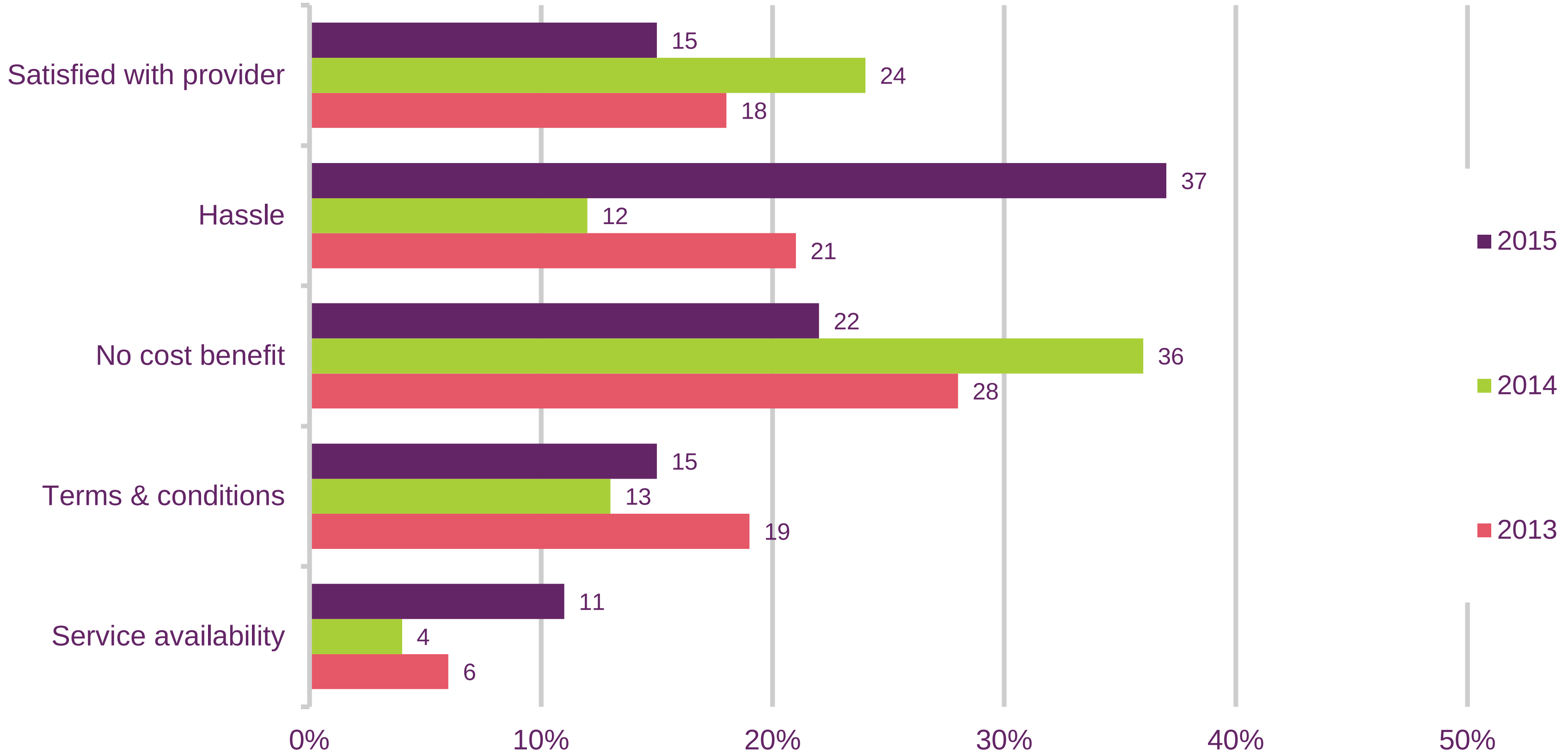
Source: Ofcom decision making survey carried out by Saville Rossiter-Base in July to August 2013, 2014 and 2015
Base: All adults aged 16+ who are the decision maker and have considered switching but did not switch in the mobile market (2015 259, 2014 119, 2013 187).

Reasons for considering but not switching provider in the fixed broadband market, 2013 - 2015



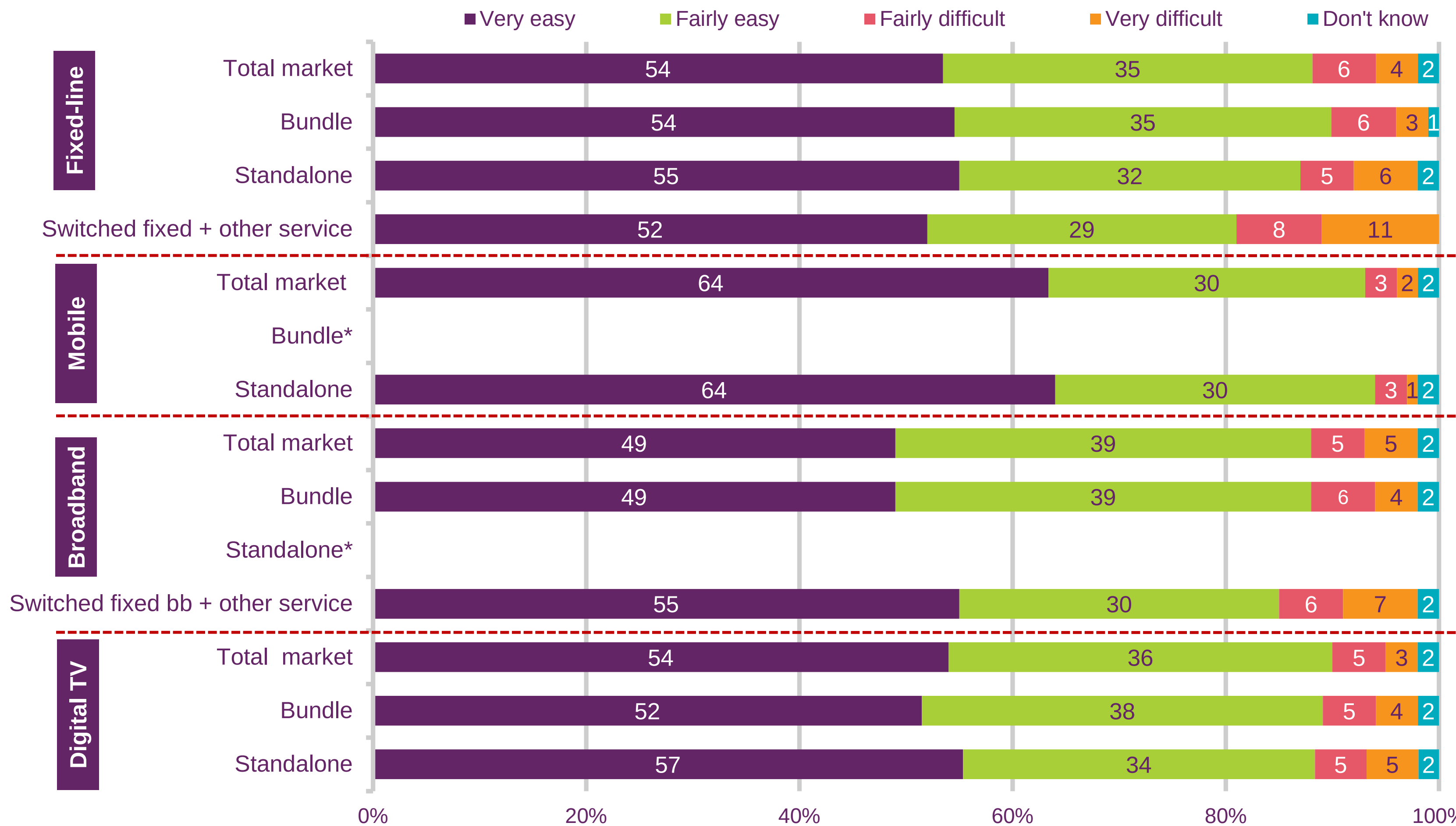
Source: Ofcom decision making survey carried out by Saville Rossiter-Base in July to August 2013, 2014 and 2015
Base: All adults aged 16+ who are the decision maker for each service who have considered switching but did not switch in the broadband market (2015 239, 2014 126, 2013 192).

Reasons for considering but not switching provider in the TV market, 2013 - 2015



Source: Ofcom decision making survey carried out by Saville Rossiter-Base in July to August 2013, 2014 and 2015
Base: All adults aged 16+ who are the decision maker for each service who have considered switching but did not switch in the TV market (2015 165, 2014 106, 2013 164).

Consumer opinions about ease of switching supplier, by purchasing behaviour, among those who have ever switched

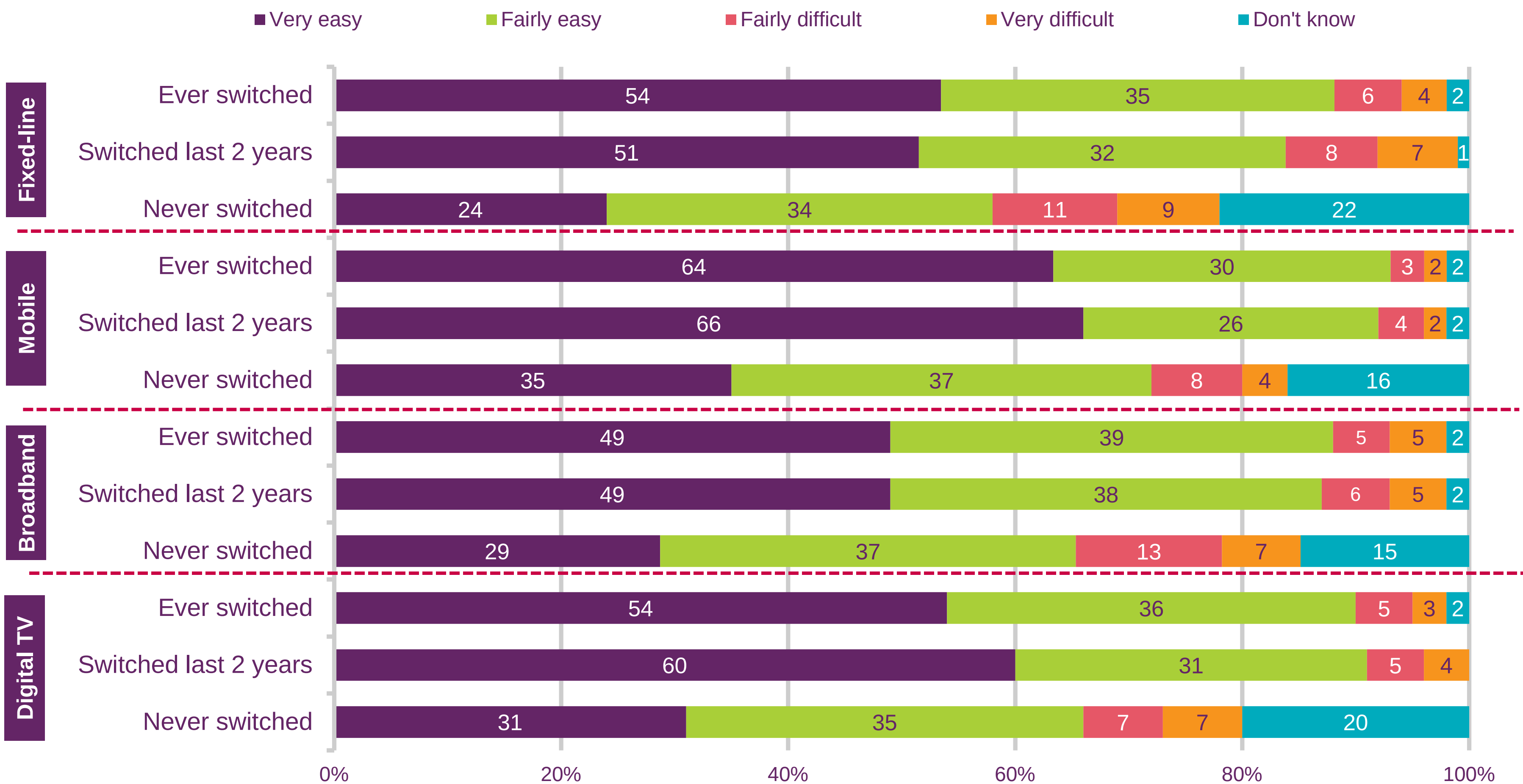


% Easy

		2013	2014	2015
Fixed-line	Total market	89%	91%	89%
	Bundle	89%	91%	89%
	Standalone	85%	92%	87%
	Switched fixed + other service	85%	91%	81%
Mobile	Total market	90%	92%	94%
	Bundle*	95%	NA	NA
	Standalone	89%	92%	94%
Broadband	Total market	85%	85%	88%
	Bundle	86%	86%	88%
	Standalone*	84%	NA	NA
	Switched fixed bb + other service	88%	92%	85%
Digital TV	Total market	92%	86%	90%
	Bundle	92%	90%	90%
	Standalone	92%	80%	91%

Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2015
Base: All adults aged 16+ who are the decision-maker and have ever switched provider for fixed line (2015, 842), mobile (2015, 1228), broadband (2015, 734), digital TV (2015, 451).
QL7b/QM7b/QI7c/QT7c. How easy or difficult was it to change the supplier of your (SERVICE)?
* Too few interviews were conducted with mobile bundle consumers who have switched, broadband standalone consumers who have switched, and mobile and digital TV consumers who switched multiple services at the same time.

Consumer opinions about ease of switching supplier, by when switched and never switched

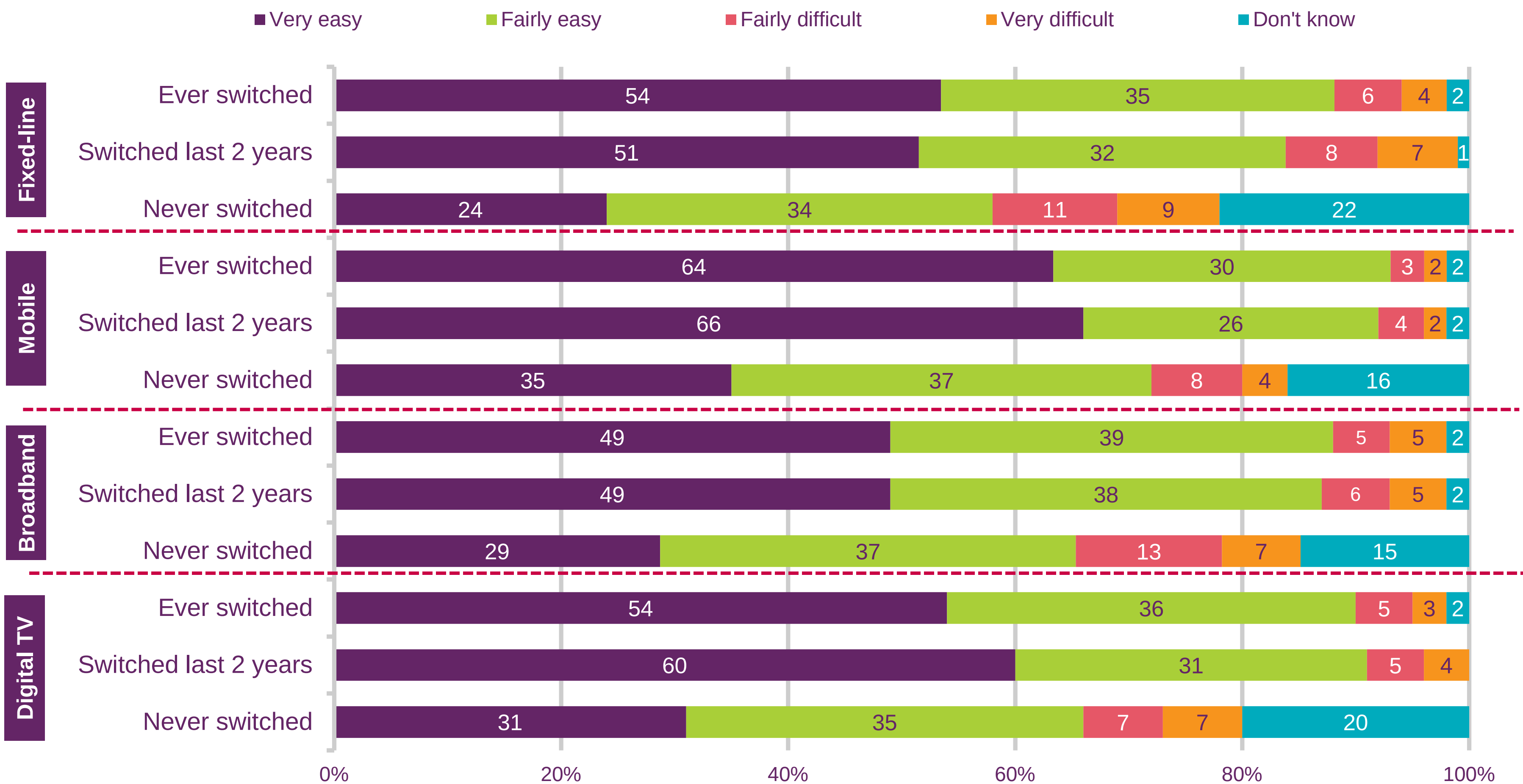


Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2015

Base: All adults aged 16+ who are the decision-maker and have ever switched provider for fixed line (842), mobile (1228), broadband (734), digital TV (451). Switched provider in the last 2 years for fixed line (274), mobile (428), broadband (257), digital TV (144). Never switched provider for fixed line (1156), mobile (1381), broadband (971), digital TV (1671)

QL7b/QM7b/QI7c/QT7c. How easy or difficult was it/ do you think it would be to change the supplier of your (SERVICE)?

Consumer opinions about ease of switching supplier, by when switched and never switched

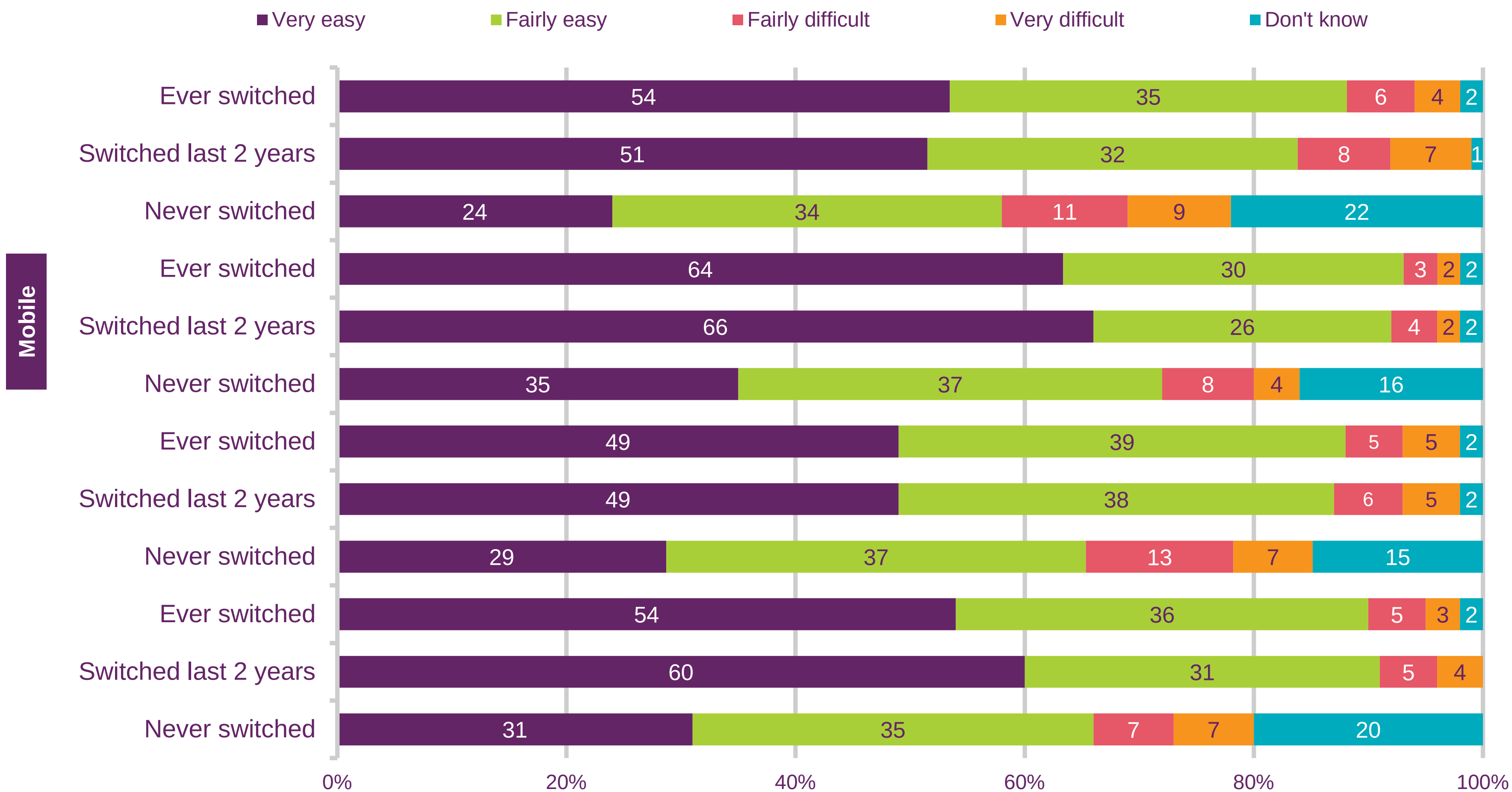


Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2015

Base: All adults aged 16+ who are the decision-maker and have ever switched provider for fixed line (842), mobile (1228), broadband (734), digital TV (451). Switched provider in the last 2 years for fixed line (274), mobile (428), broadband (257), digital TV (144). Never switched provider for fixed line (1156), mobile (1381), broadband (971), digital TV (1671)

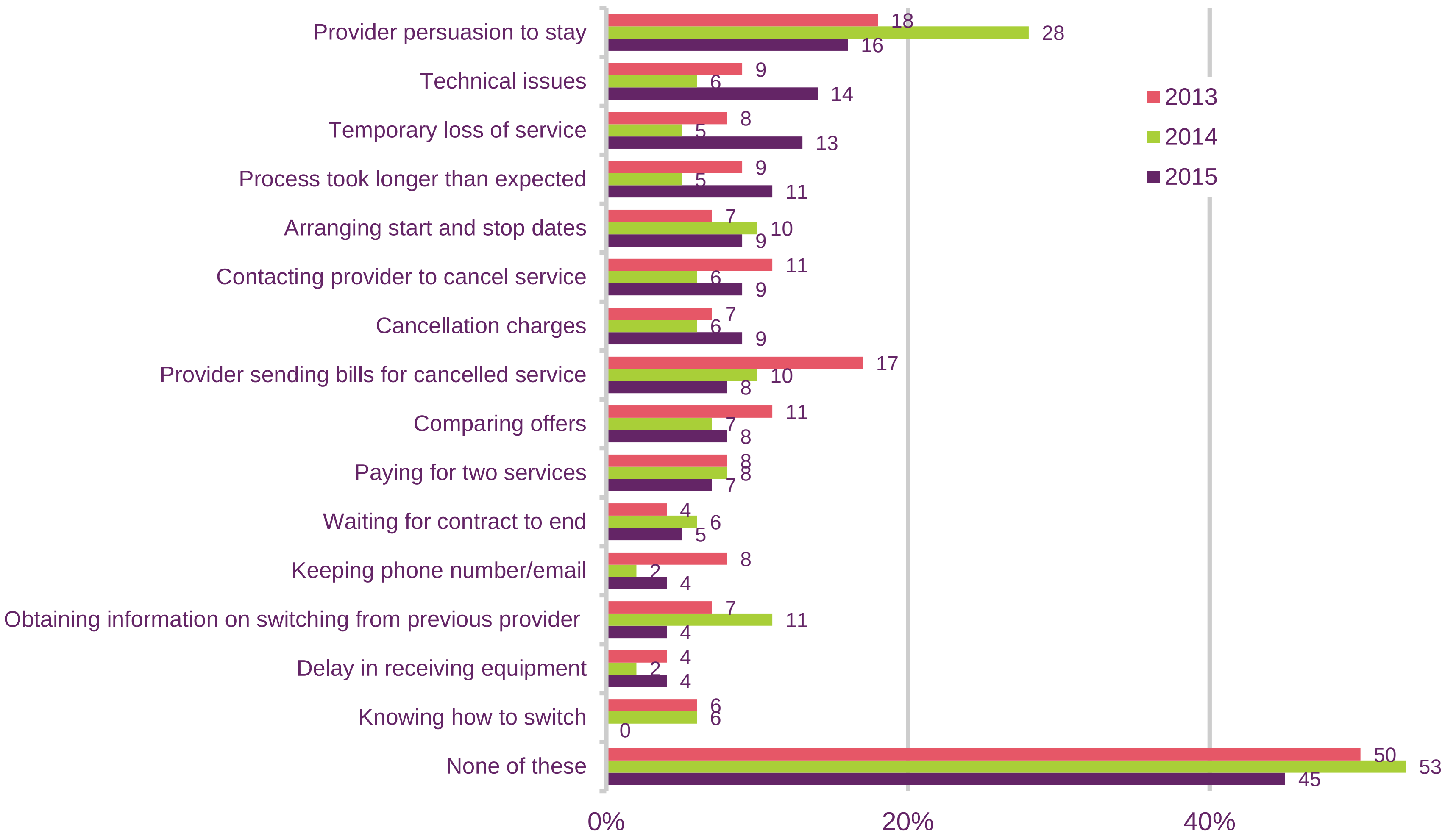
QL7b/QM7b/QI7c/QT7c. How easy or difficult was it/ do you think it would be to change the supplier of your (SERVICE)?

Consumer opinions about ease of switching supplier, by when switched and never switched



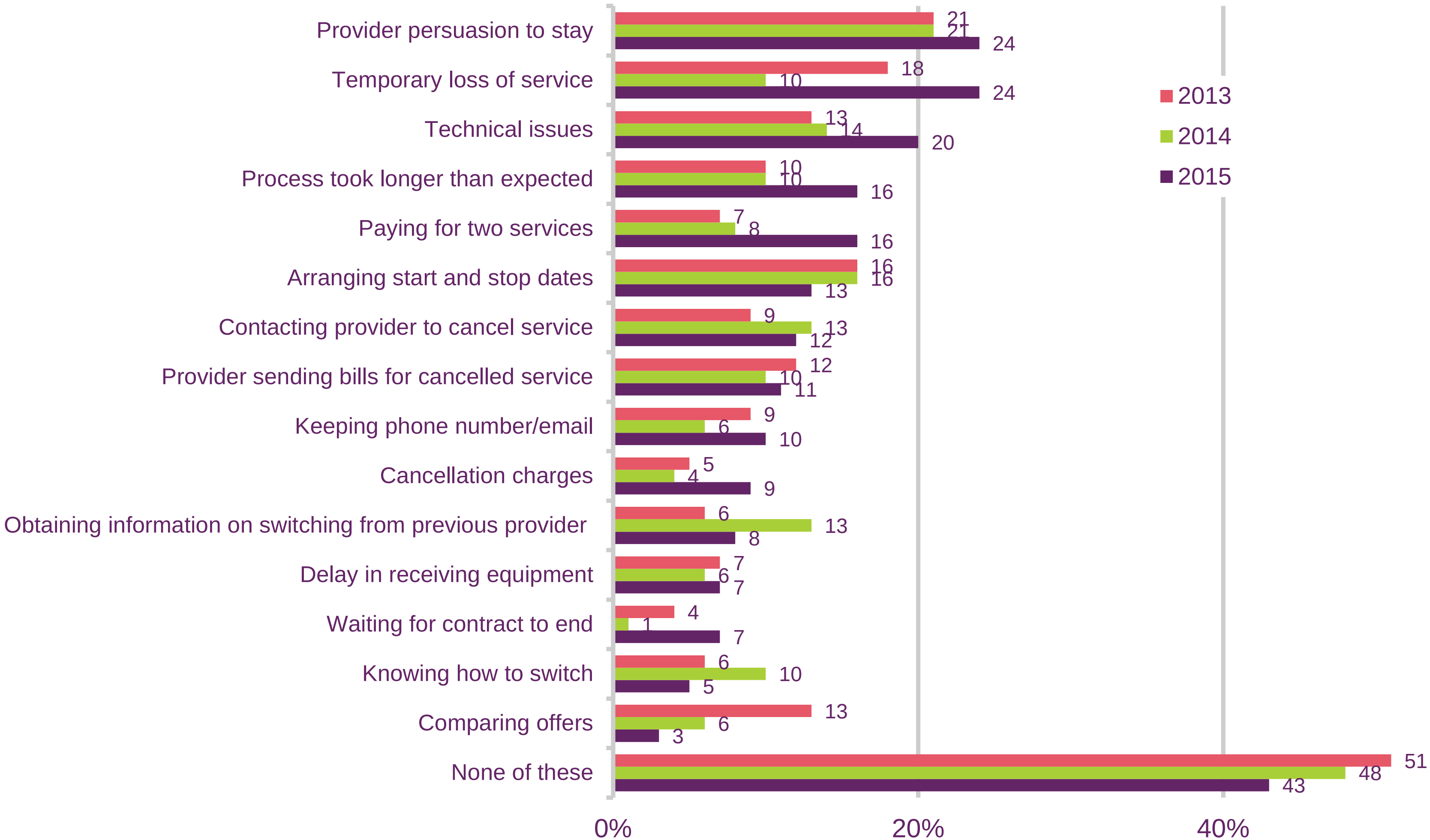
Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2015
Base: All adults aged 16+ who are the decision-maker and have ever switched provider for fixed line (842), mobile (1228), broadband (734), digital TV (451). Switched provider in the last 2 years for fixed line (274), mobile (428), broadband (257), digital TV (144). Never switched provider for fixed line (1156), mobile (1381), broadband (971), digital TV (1671)
QL7b/QM7b/QI7c/QT7c. How easy or difficult was it/ do you think it would be to change the supplier of your (SERVICE)?

Experience of prompted issues among those who had switched fixed line in past 12 months – 2013, 2014 & 2015



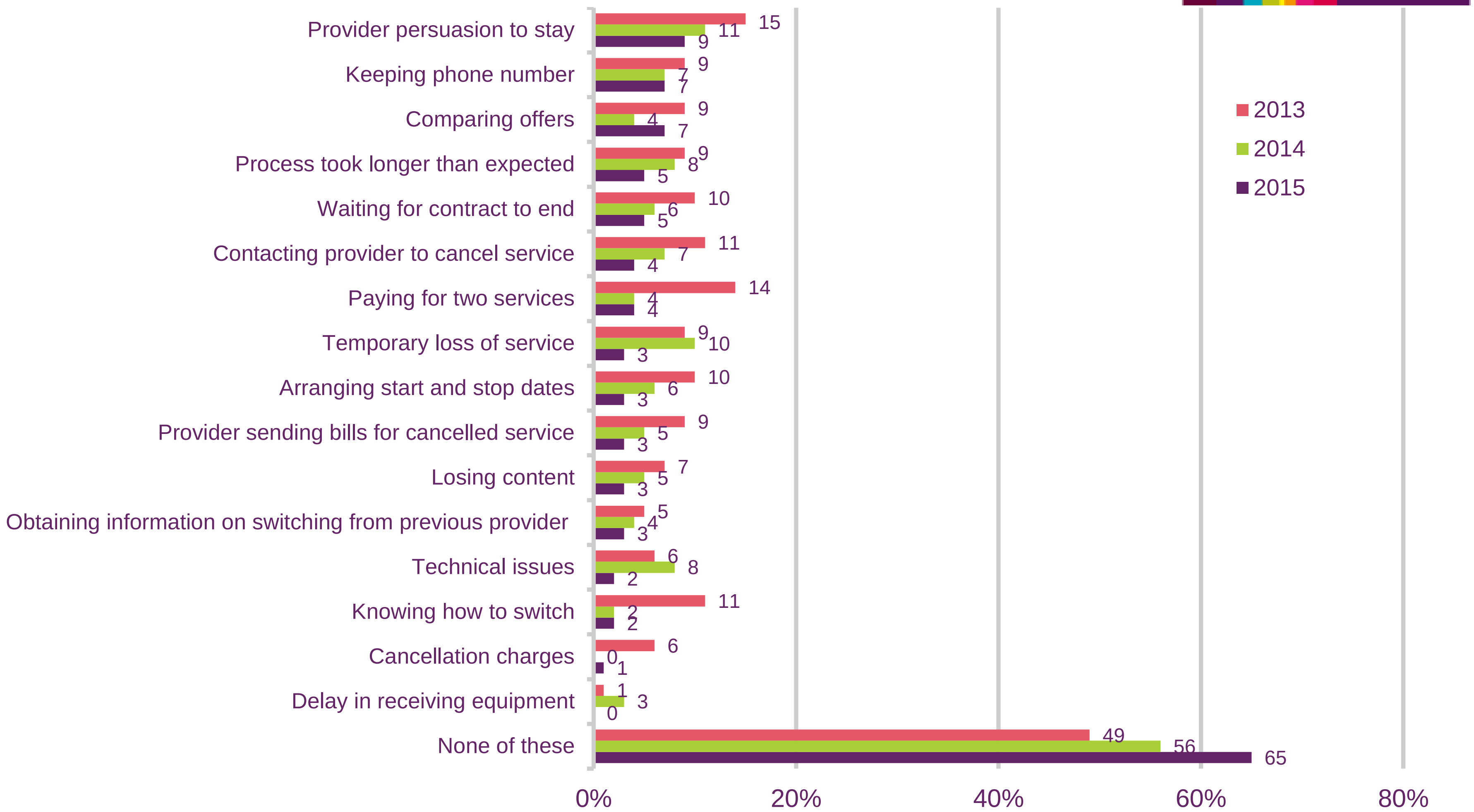
Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2015
Base: All adults aged 16+ who switched provider in the last 12 months for fixed-line (2015, 170) (2014, *96) (2013, 159) *Caution: Low base, treat as indicative only.
QL7ca. Thinking about when you switched your landline service, did you experience any difficulties with any of the following?

Experience of prompted issues among those who had switched fixed broadband provider in past 12 months – 2013, 2014 & 2015



Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2015
Base: All adults aged 16+ who switched provider in the last 12 months fixed broadband (2015, 134) (2014, *80) (2013, 141) *Caution: Low base, treat as indicative only.
QI7da. Thinking about when you switched your internet service, did you experience any difficulties with any of the following?

Experience of prompted issues among those who had switched mobile provider in past 12 months – 2013, 2014 & 2015



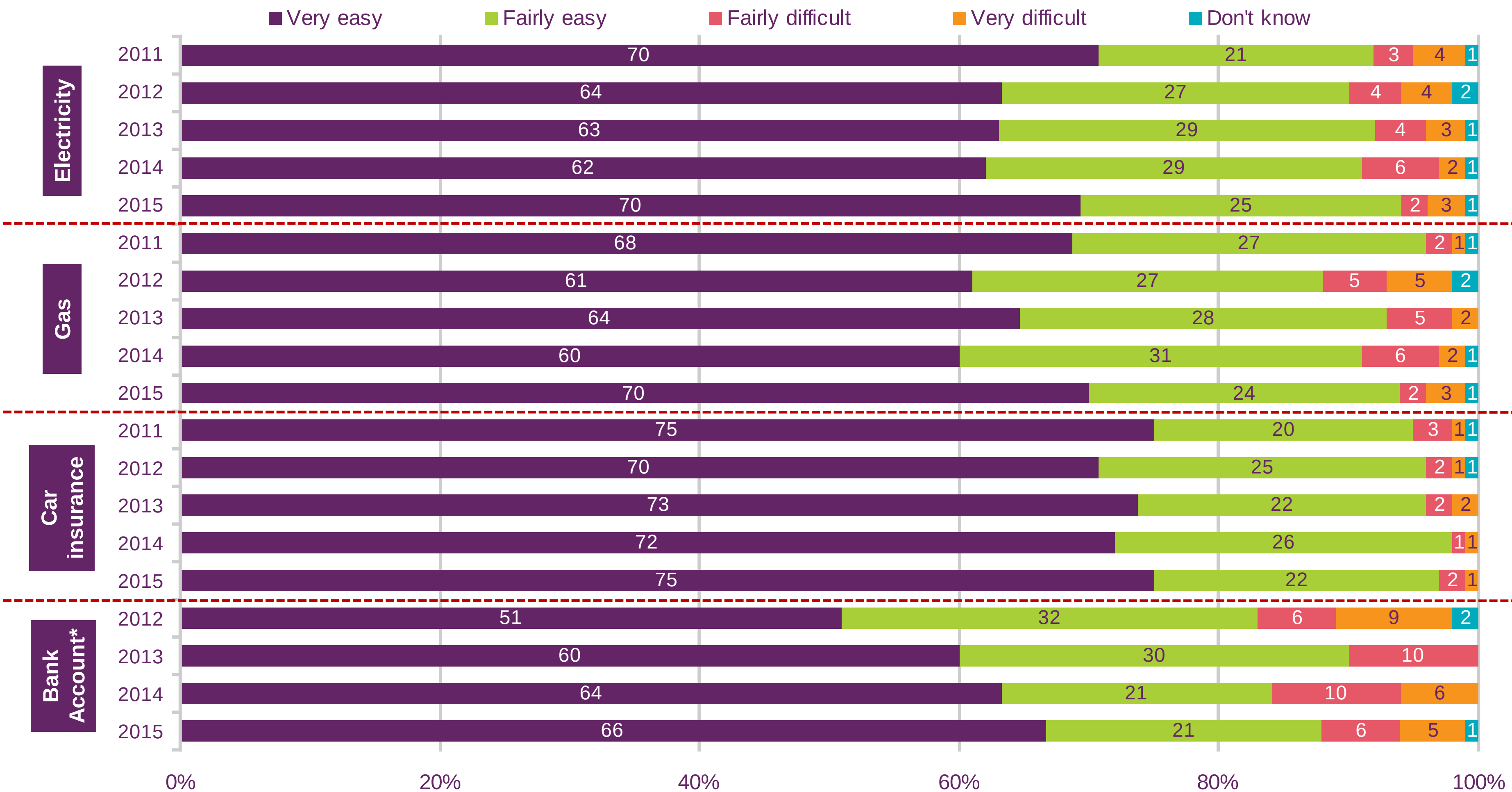
Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2015
Base: All adults aged 16+ who switched provider in the last 12 months for mobile (2015, 244) (2014, 108) (2013, 160).
QM7ca. Thinking about when you switched your mobile service, did you experience any difficulties with any of the following?

Proportion of customers who have switched suppliers in the past 12 months

Switched in 12 months to Sept.	Sept 2015		Sept 2014		Sept 2013	
	Total	Excl. home move	Total	Excl. home move	Total	Excl. home move
Car Insurance	37%	35%	34%	33%	37%	36%
Electricity	16%	11%	16%	12%	15%	12%
Gas	15%	10%	16%	12%	14%	12%
Bank	4%	3%	3% ↓	3%	5%	5%

Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2015
Base: All adults aged 16+ who are the decision-maker for electricity (2015,2363), gas (2015,2033), car insurance (2015,1915), bank account (2015,2668)
QA1A/QA1B/QA1C/QA1D. Have you or your household ever changed your electricity supplier/ your gas supplier/ your car insurance provider/ your bank account? QL7/QM7/QI7.

Consumer opinions on ease of switching utilities supplier, among those who had switched in the past 12 months



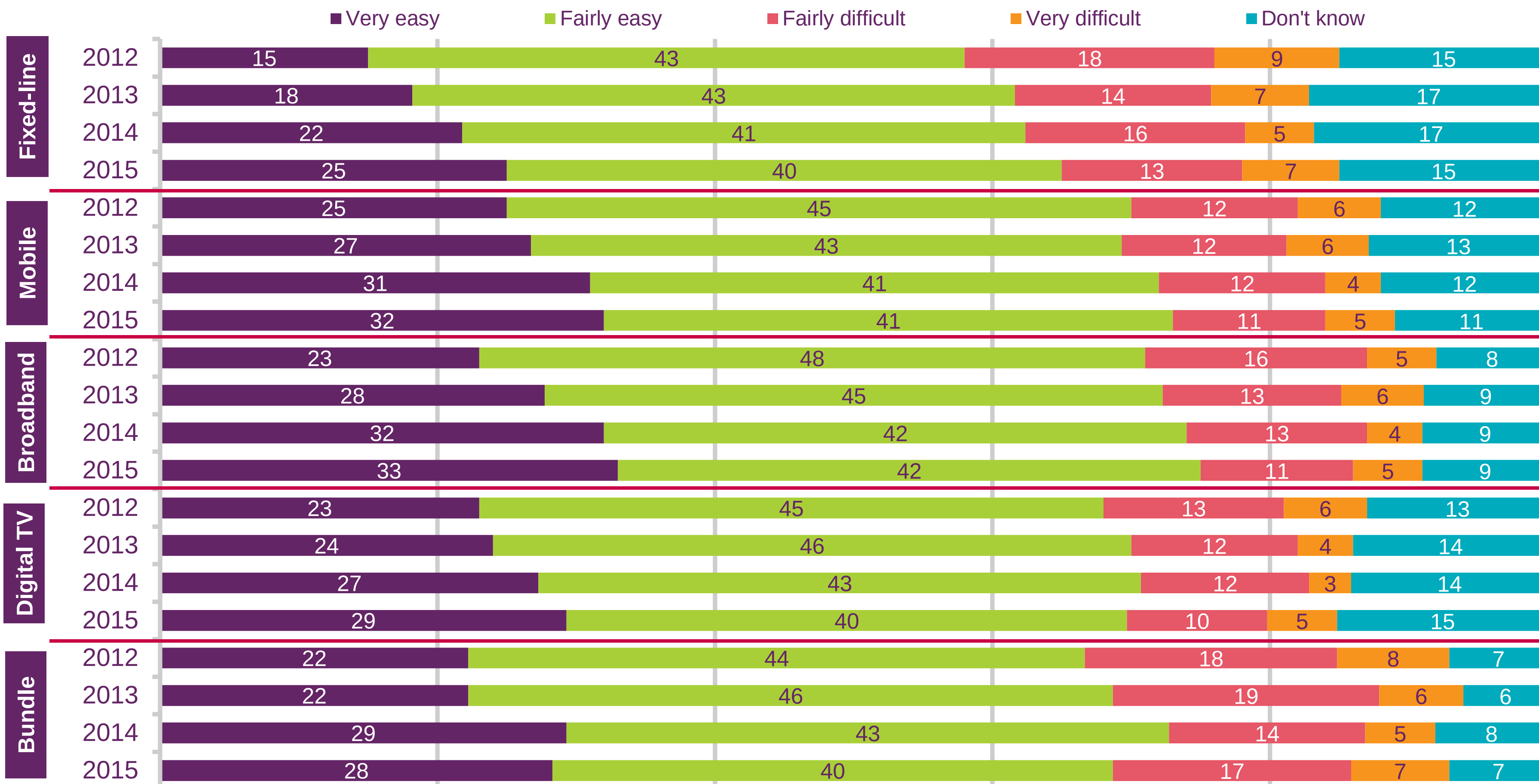
Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in June to July 2011, July to August 2012, 2013, 2014 and 2015
Base: All adults aged 16+ who are the decision-maker and have switched provider in the last 12 months for electricity (2015, 251), gas (2015, 196), car insurance (2015, 652), bank account (2015, 81).
QL7b/QM7b/QI7c/QT7c. How easy or difficult was it to change the supplier of your (SERVICE)?
*Caution: Low base in 2015 so treat as indicative only, and base too low for reporting in 2011

Actual sources of trusted information

	Landline providers, price plans and tariffs	Mobile phone handsets, price plans and tariffs and network providers	Broadband speeds, price plans and packages and providers	Ways of receiving multichannel TV, channel packages and providers	Providers offering packages of services and the types of packages available
Websites of suppliers/ service providers	15%	15%	15%	13%	8%
Cost comparison websites	20%	15%	19%	13%	13%
Internet in general	47%	44%	54%	48%	62%
Family members	19%	22%	21%	23%	16%
Friends	14%	18%	16%	16%	13%
Colleagues	3%	3%	4%	3%	3%
Supplier already using for this service	5%	6%	4%	5%	3%
Another supplier not already using	2%	3%	2%	3%	2%
Visit shop/ store selling the technology/ device	2%	16%	2%	3%	2%
Magazines/ newspapers	3%	2%	3%	2%	4%
TV/ radio programmes/ advertising	1%	1%	2%	2%	2%
Leaflets in store/ post	2%	2%	2%	2%	1%
Government body/ regulator	1%	*%	1%	*%	*%
Other source of information	2%	1%	2%	1%	2%
Would not look for information/ advice	4%	2%	1%	4%	1%
Don't know	8%	5%	4%	7%	1%

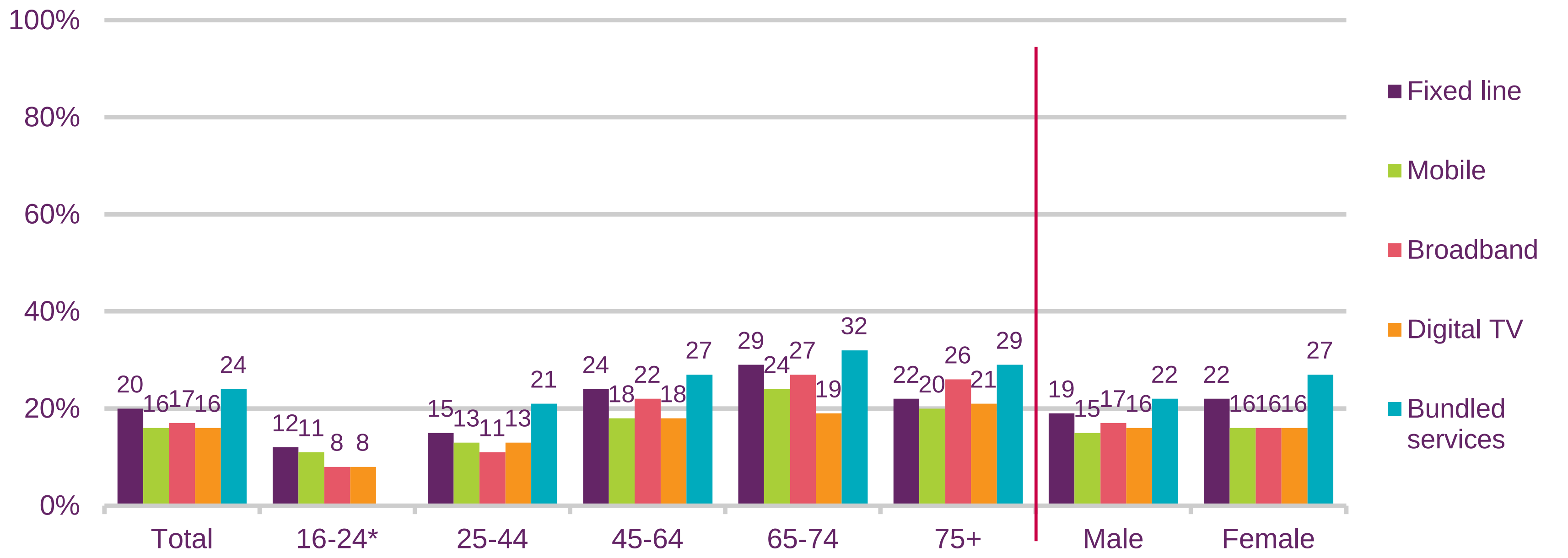
Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2015.
Base: All adults aged 16+ who are the decision-maker for fixed line (2199), mobile (2609), broadband (1877), digital TV (2251), bundle (1297).
QL21/QM21/QI21/QT21/QB21. If you were looking for advice or information on (landline providers, price plans and tariffs/ mobile phone handsets, price plans and tariffs, and network providers/ broadband speeds, price plans and packages and providers/ ways of receiving TV, channel packages and providers/ providers offering packages of services and the types of packages available), where would you turn to for trusted information?

Consumers' opinions on the ease of making cost comparisons: 2012-2015



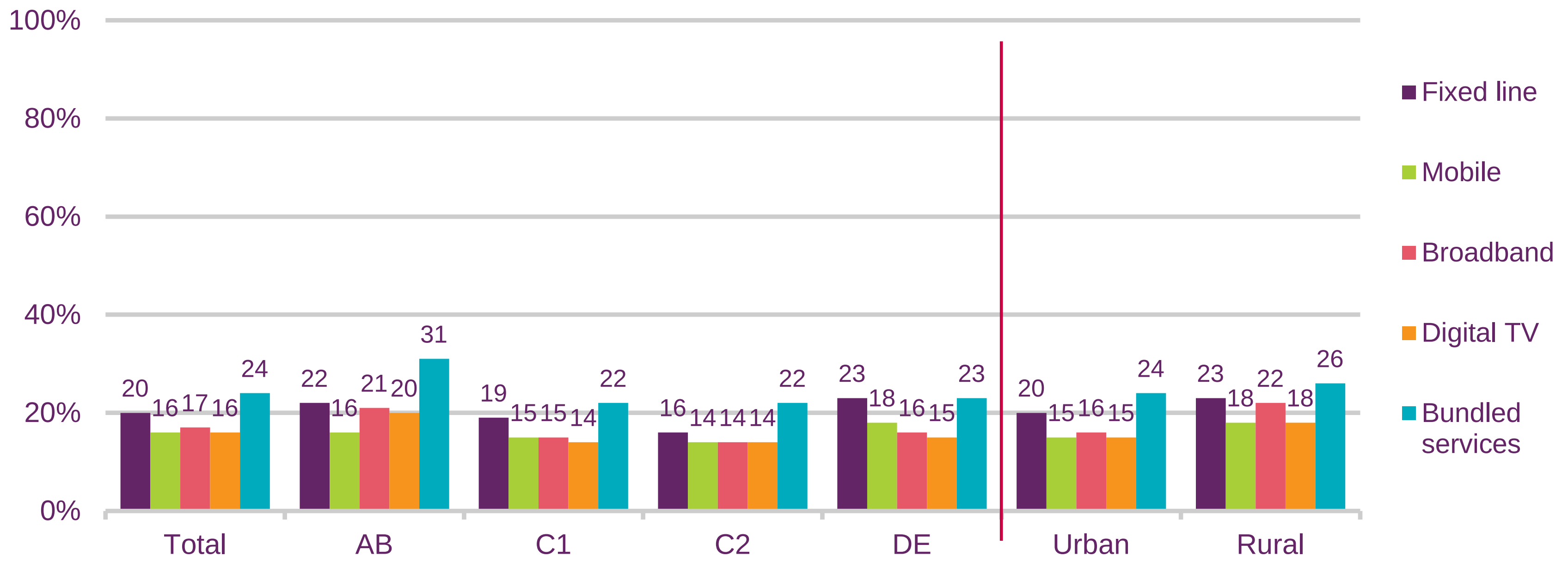
Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2012, 2013, 2014 and 2015. Further trend data are available in previous reports, based on single service purchasers only. Base: All adults aged 16+ who are the decision-maker for fixed line (2012, 1636) (2013, 1596) (2014, 1736) (2015, 2199), mobile (2012, 1714) (2013, 1718) (2014, 1679) (2015, 2609), fixed broadband (2012, 1341) (2013, 1291) (2014, 1464) (2015, 1877), digital TV (2012, 1483) (2013, 1592) (2014, 1723) (2015, 2251), and decision makers for those with any bundle (2012, 1079) (2013, 1133) (2014, 1374) (2015, 1297). There will be overlap between bundlers and data for each market.
QL22/QM22/QI22/QT22/QB22. How easy or difficult do you think it is to make COST comparisons between (SERVICE) suppliers?

Age and gender profile of those who find it difficult to make cost comparisons



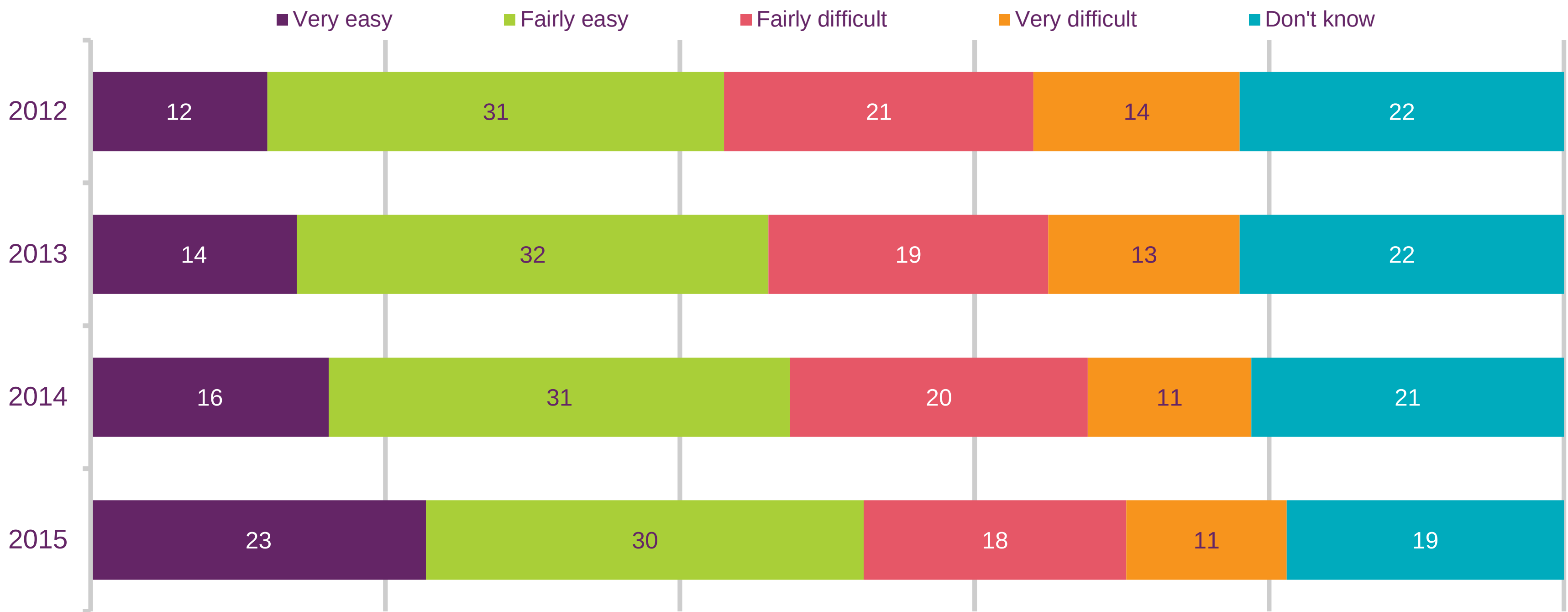
Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2015.
Base: All adults aged 16+ who are the decision-maker for fixed line (2199), mobile (2609), broadband (1877), digital TV (2251), bundle (1297).
QL22/QM22/QI22/QT22/QB22. How easy or difficult do you think it is to make COST comparisons between (SERVICE) suppliers?
*Caution: Low base size for 16-24 for fixed-line, broadband, and TV, treat as indicative only. Base too low for reporting for 16-24 for bundled services

Socio-economic and urbanity profile of those who find it difficult to make cost comparisons



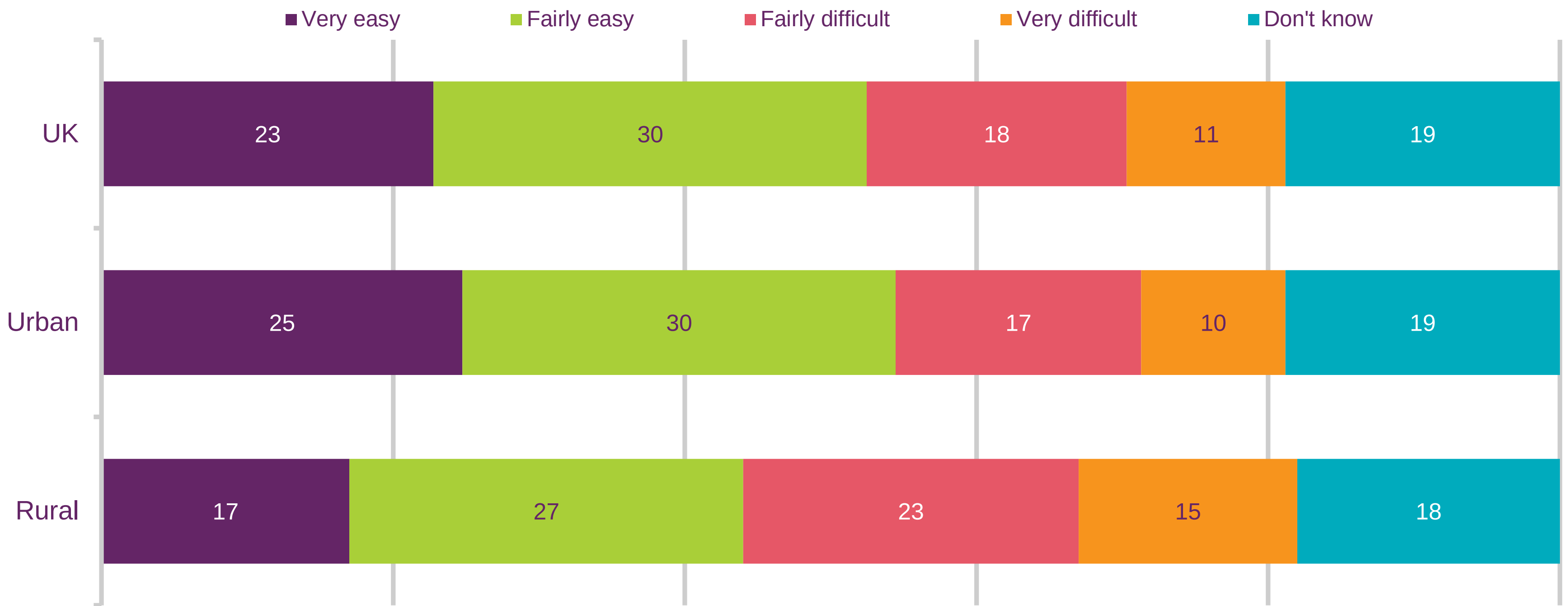
Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2015.
Base: All adults aged 16+ who are the decision-maker for fixed line (2199), mobile (2609), broadband (1877), digital TV (2251), bundle (1297).
QL22/QM22/QI22/QT22/QB22. How easy or difficult do you think it is to make COST comparisons between (SERVICE) suppliers?

Consumers' opinions on the ease of making coverage comparisons between mobile suppliers: 2012-2015



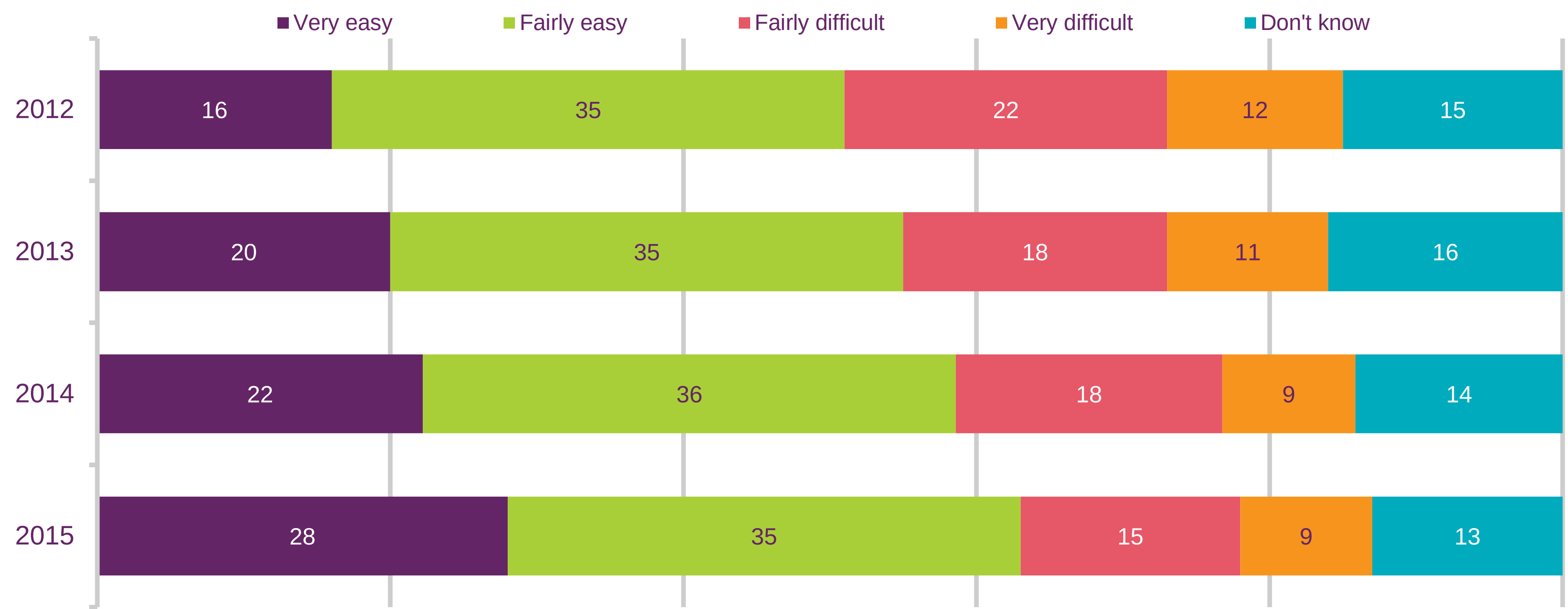
Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2012, 2013, 2014 and 2015.
Base: All adults aged 16+ who are the decision-maker for mobile (2012, 1714) (2013, 1718) (2014, 1679) (2015, 2609).
QM24. And how easy or difficult do you think it is to make COVERAGE (network availability and signal strength) comparisons between suppliers?

Consumers' opinions on the ease of making coverage comparisons between mobile suppliers: by urbanity



Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2015.
Base: All adults aged 16+ who are the decision-maker for mobile (total, 2609) (urban, 2115) (rural, 378).
QM24. And how easy or difficult do you think it is to make COVERAGE (network availability and signal strength) comparisons between suppliers?

Consumers' opinions on the ease of making broadband speed comparisons between suppliers: 2012-2015

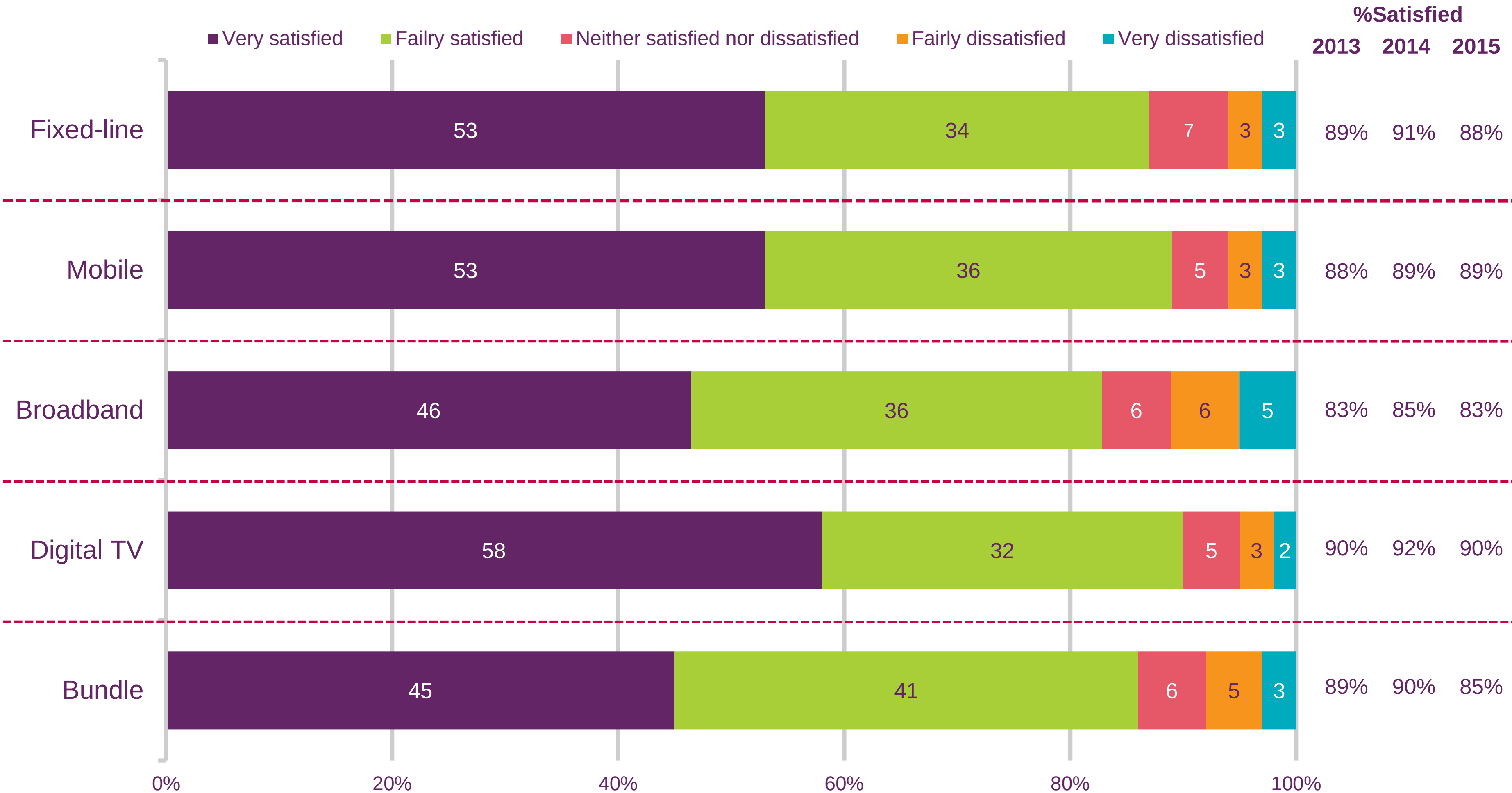


Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2012, 2013, 2014 and 2015.
Base: All adults aged 16+ who are the decision-maker for fixed broadband (2012, 1341) (2013, 1291) (2014, 1464) (2015, 1877).
QI25. And how easy or difficult do you think it is to make BROADBAND SPEED comparisons between different home fixed broadband service providers?

Consumers' opinions on the ease of making broadband speed comparisons between suppliers: by urbanity

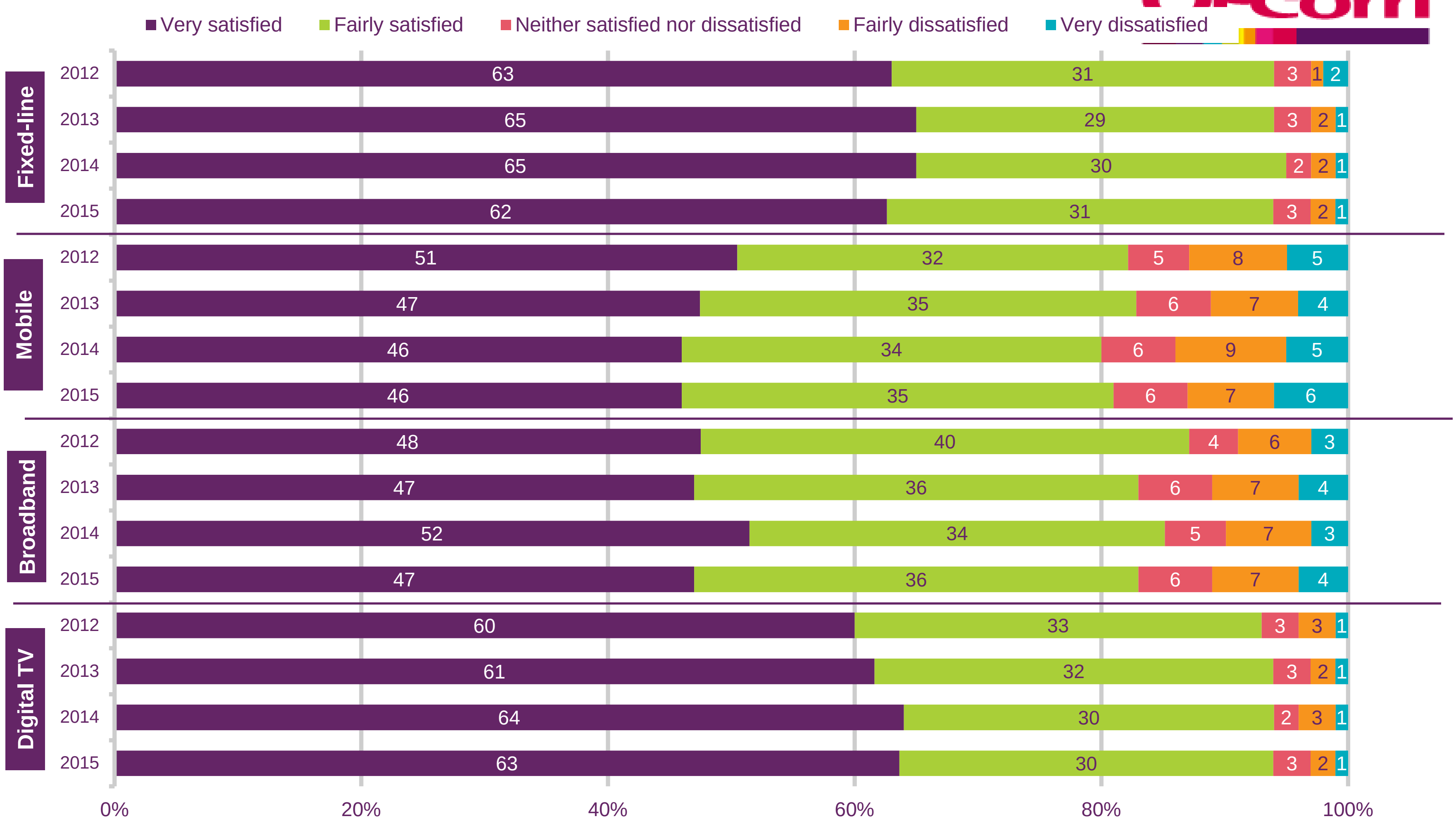
Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2015.
Base: All adults aged 16+ who are the decision-maker for fixed broadband (total, 1877) (urban, 1528) (rural, 287).
QI25. And how easy or difficult do you think it is to make BROADBAND SPEED comparisons between different home fixed broadband service providers?

Satisfaction with overall services from communications supplier - total market



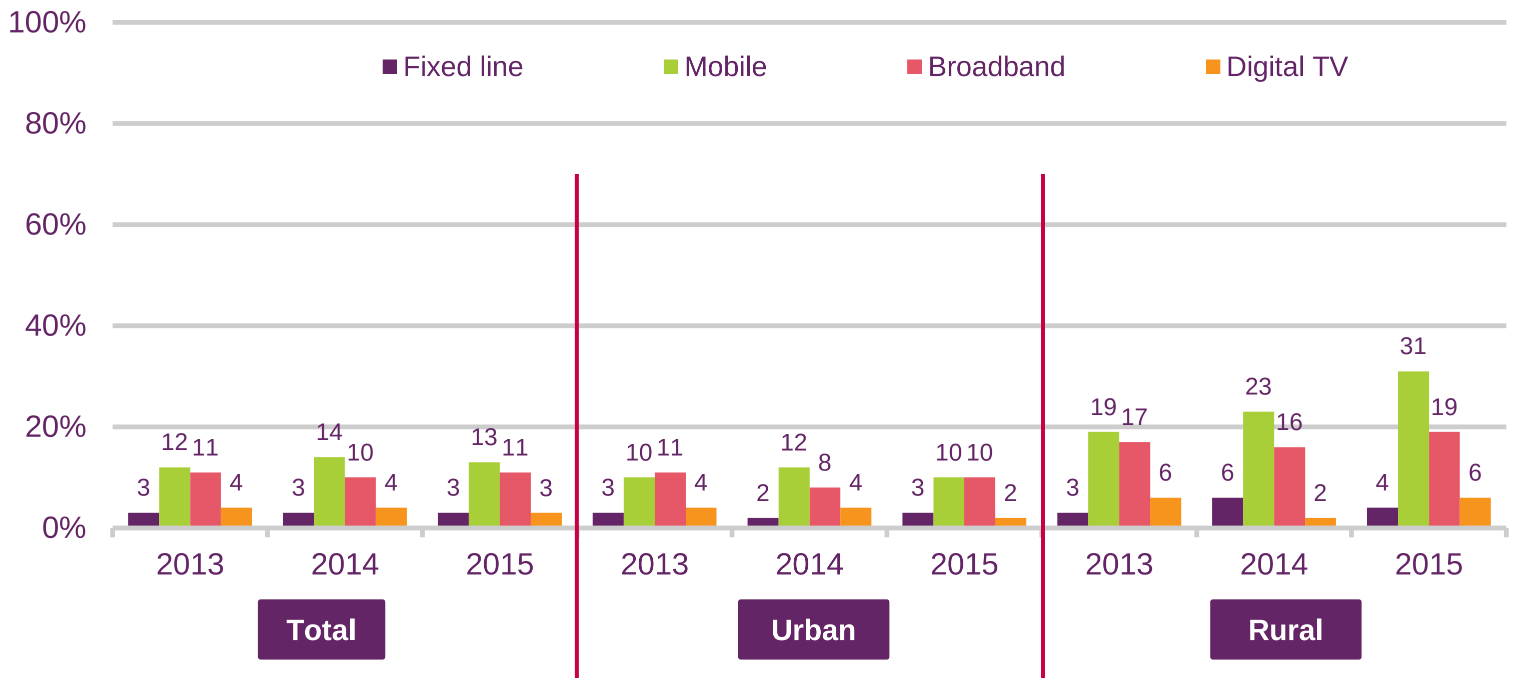
Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2015
Base: All adults aged 16+ who are the decision-maker and express an opinion on fixed line (2015, 2168), mobile (2015, 2594), fixed broadband (2015, 1868), digital TV (2015, 2228), any bundlers (2015, 1295). 'Don't know' responses have been excluded from the base.
QL5/QM5/QI5/QT5/QB5. In terms of your (SERVICE)... How satisfied are you with the OVERALL SERVICE PROVIDED by (PROVIDER)? Would you say you are...

Satisfaction with reliability of service (reception/ease of accessing mobile network) among total market: 2012-2015



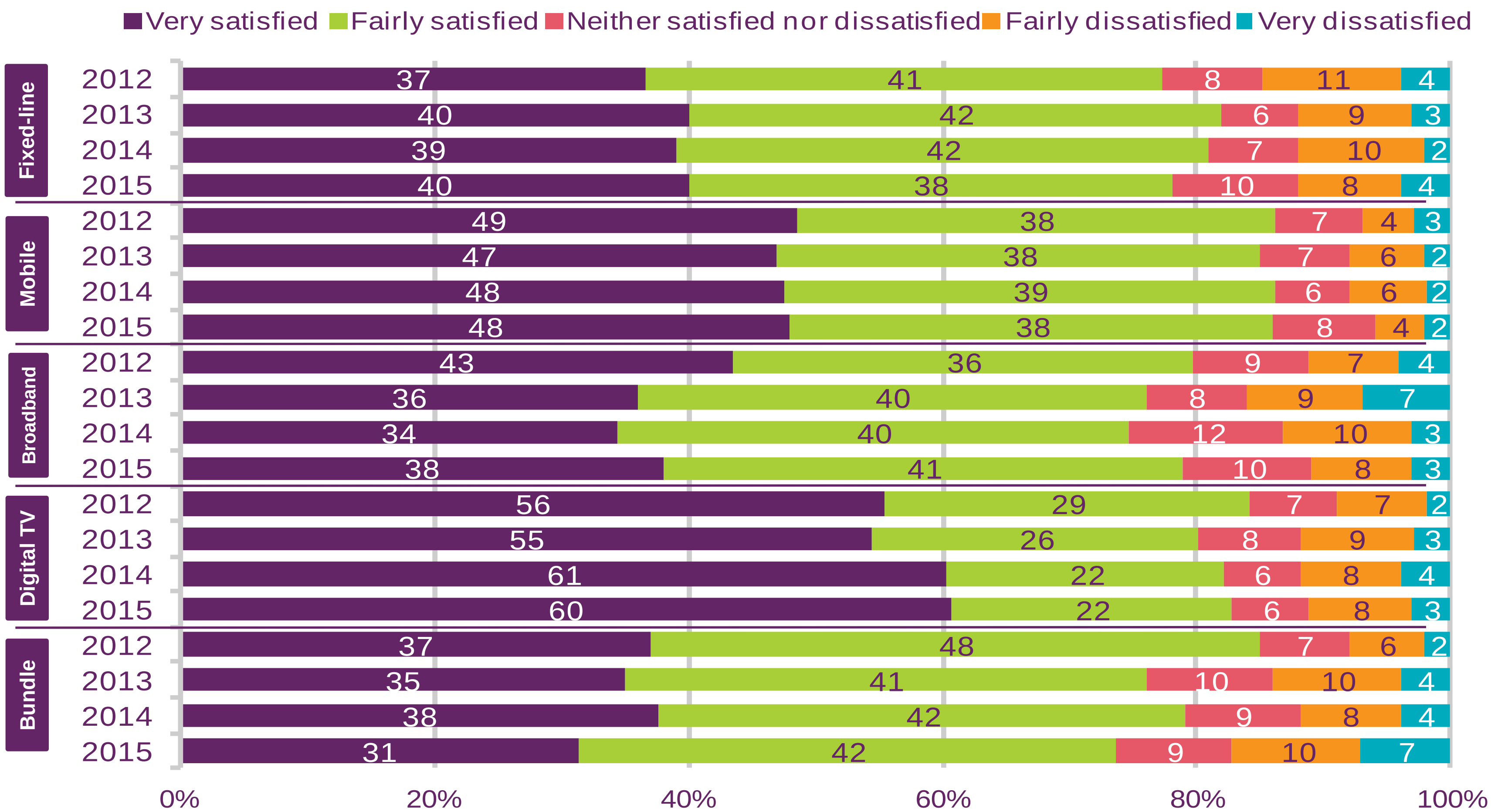
Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2012, 2013, 2014 and 2015
Base: All adults aged 16+ who are the decision-maker and express an opinion on fixed line (2012, 1624) (2013,1576) (2014, 1730) (2015, 2165), mobile (2012, 1703) (2013,1703) (2014, 1670) (2015, 2587), fixed broadband (2012, 1337) (2013,1283) (2014, 1459) (2015, 1864), digital TV (2012, 1468) (2013,1583) (2014, 1716) (2015, 2238). 'Don't know' responses have been excluded from the base.
QL5b/QM5b/QI5b/QT5b. And how satisfied are you with the RELIABILITY of your (SERVICE) from (PROVIDER)? Would you say you are...

Dissatisfaction with reliability of service, by urbanity: 2013-2015



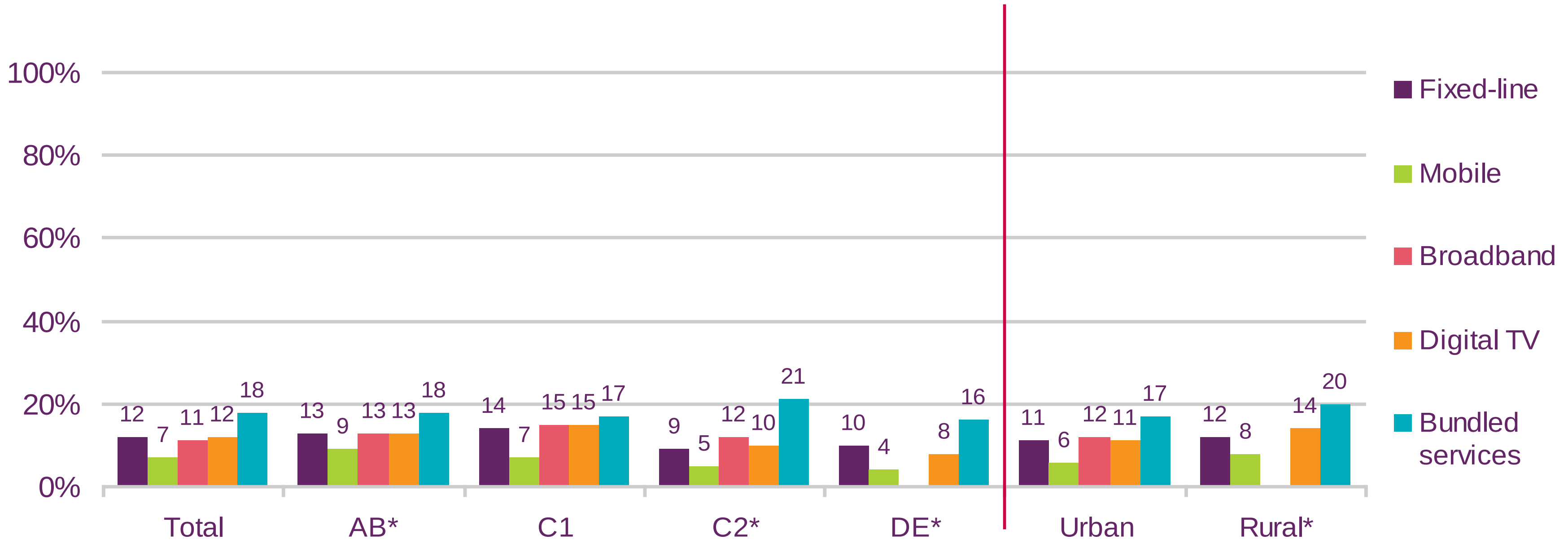
Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2013, 2014 and 2015
Base: All adults aged 16+ who are the decision-maker and express an opinion on fixed line (2015, 2165), mobile (2015, 2587), broadband (2015, 1864), digital TV (2015, 2238). 'Don't know' responses have been excluded from the base.
QL5b/QM5b/QI5b/QT5b. And how satisfied are you with the RELIABILITY of your (SERVICE) from (PROVIDER)? Would you say you are...

Satisfaction with value for money: 2012-2015



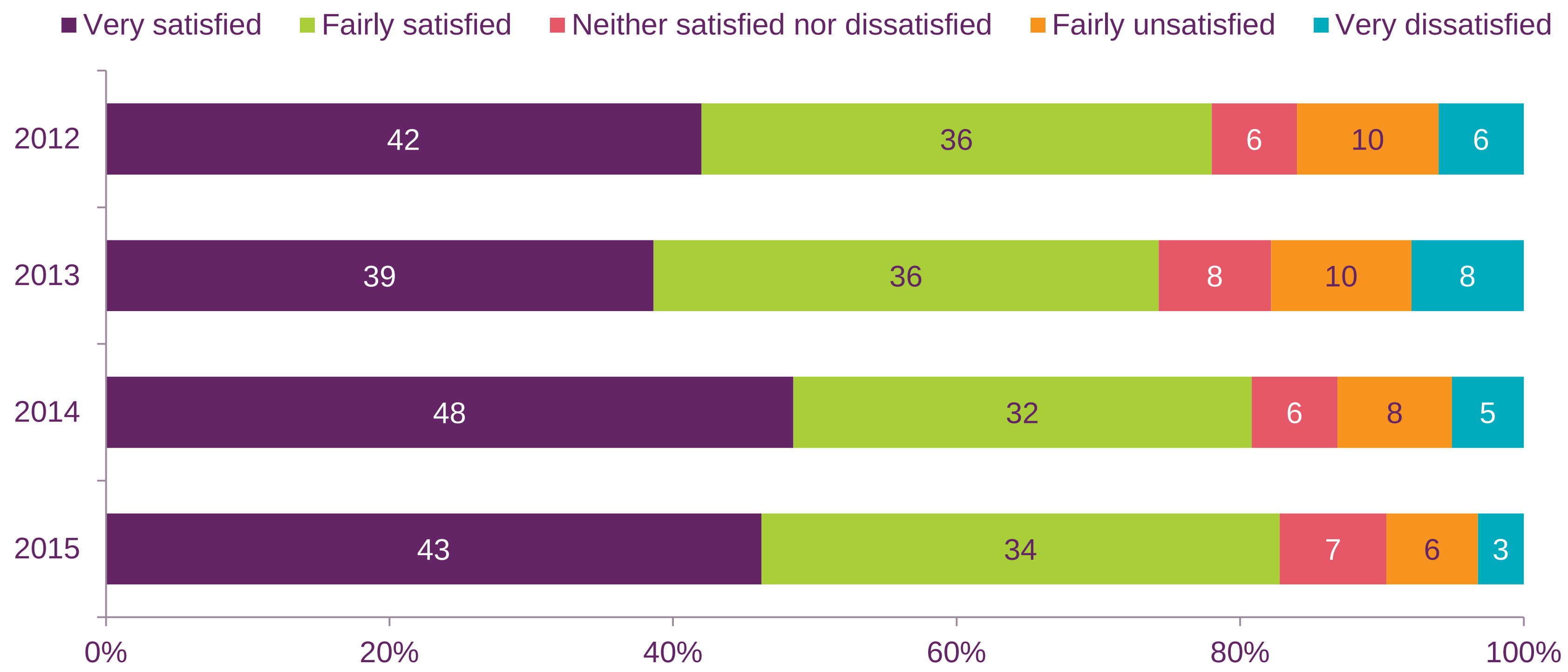
Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2012, 2013, 2014 and 2015
Base: All adults aged 16+ who are the decision-maker and express an opinion on fixed line (2015, 636), mobile (2015, 2421), broadband (2015, 301), digital TV (2015, 1374), bundle (2015, 1284). 'Don't know' responses have been excluded from the base.
QL5a/QM5a/QI5a/QT5a. And how satisfied are you with the VALUE FOR MONEY of your service from (PROVIDER)? Would you say you are…

Dissatisfaction with value for money, by socio-economic group and urbanity



Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2015
Base: All adults aged 16+ who are the decision-maker and express an opinion on fixed line (2015, 636), mobile (2015, 2421), broadband (2015, 301), digital TV (2015, 1374), bundled services (2015, 1284).
*Caution: Base too low for broadband for each socio-economic group DE and rural and low base for socio-economic groups AB and C2, so treat as indicative only. 'Don't know' responses have been excluded from the base.
QL5a/QM5a/QI5a/QT5a. And how satisfied are you with the VALUE FOR MONEY of your service from (PROVIDER)? Would you say you are…

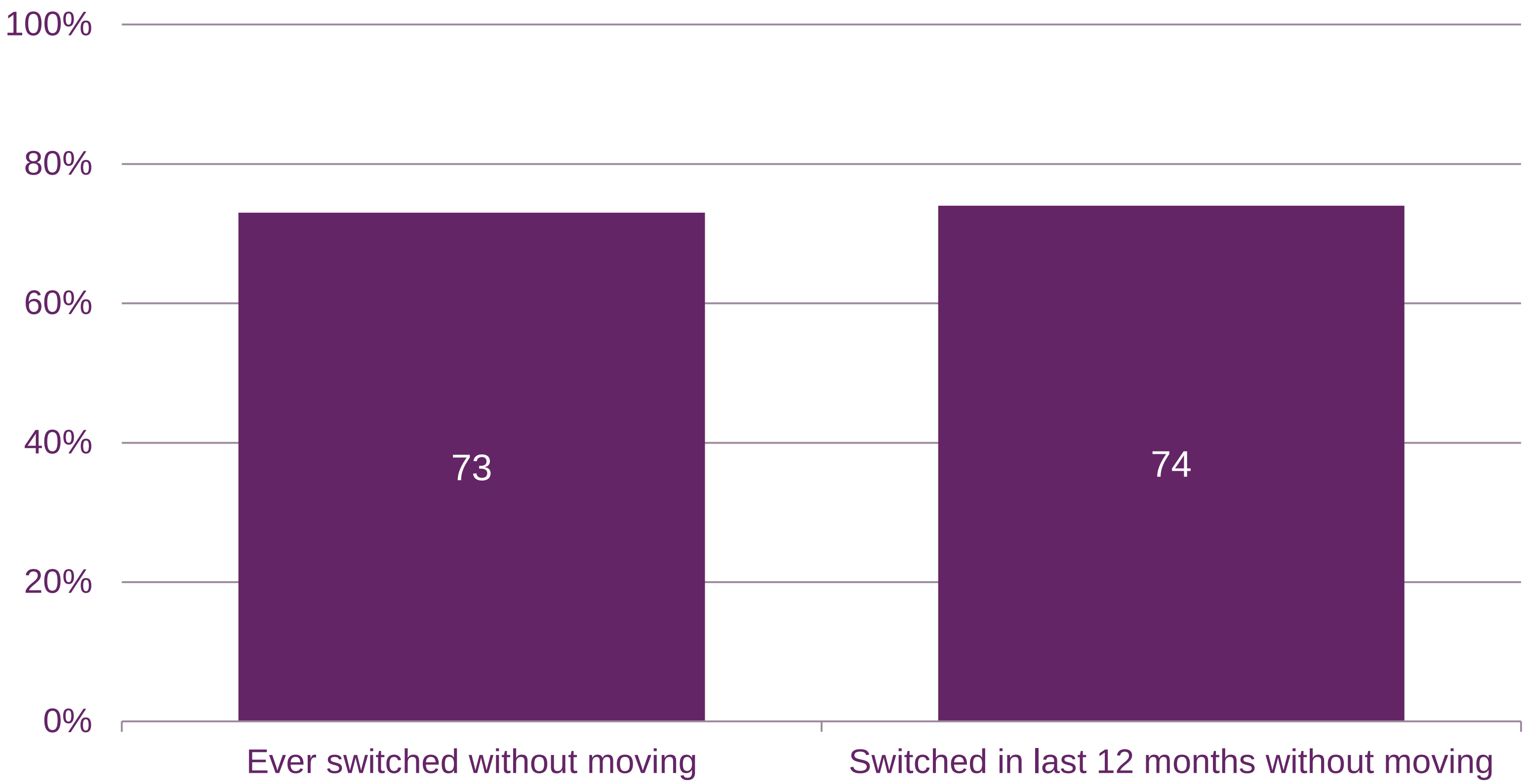
Satisfaction with speed of fixed broadband service while online: 2012-2015



Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2012-2015
Base: All adults aged 16+ who are the fixed broadband decision-maker who expressed an opinion (2012, 1318) (2013, 1254) (2014, 1449), (2015, 1851).
QI5c. And how satisfied are you with the SPEED OF SERVICE while online (not just the connection)? Would you say you are...
Note: 'Don't know' responses have been excluded from the base.

Additional Analysis

Kept same landline telephone number when switching landline supplier



QL7D – And did you keep the same telephone number when you switched your landline service? IF CHANGED PROVIDER MORE THAN ONCE - Think about the landline service you changed most recently
Source: Ofcom decision making survey carried out by Saville Rossiter-Base in July to August 2015
Base: All adults aged 16+ who are the decision maker for the household fixed line and have ever switched supplier without moving home (852), have switched supplier in the last 12 months without moving home (172)