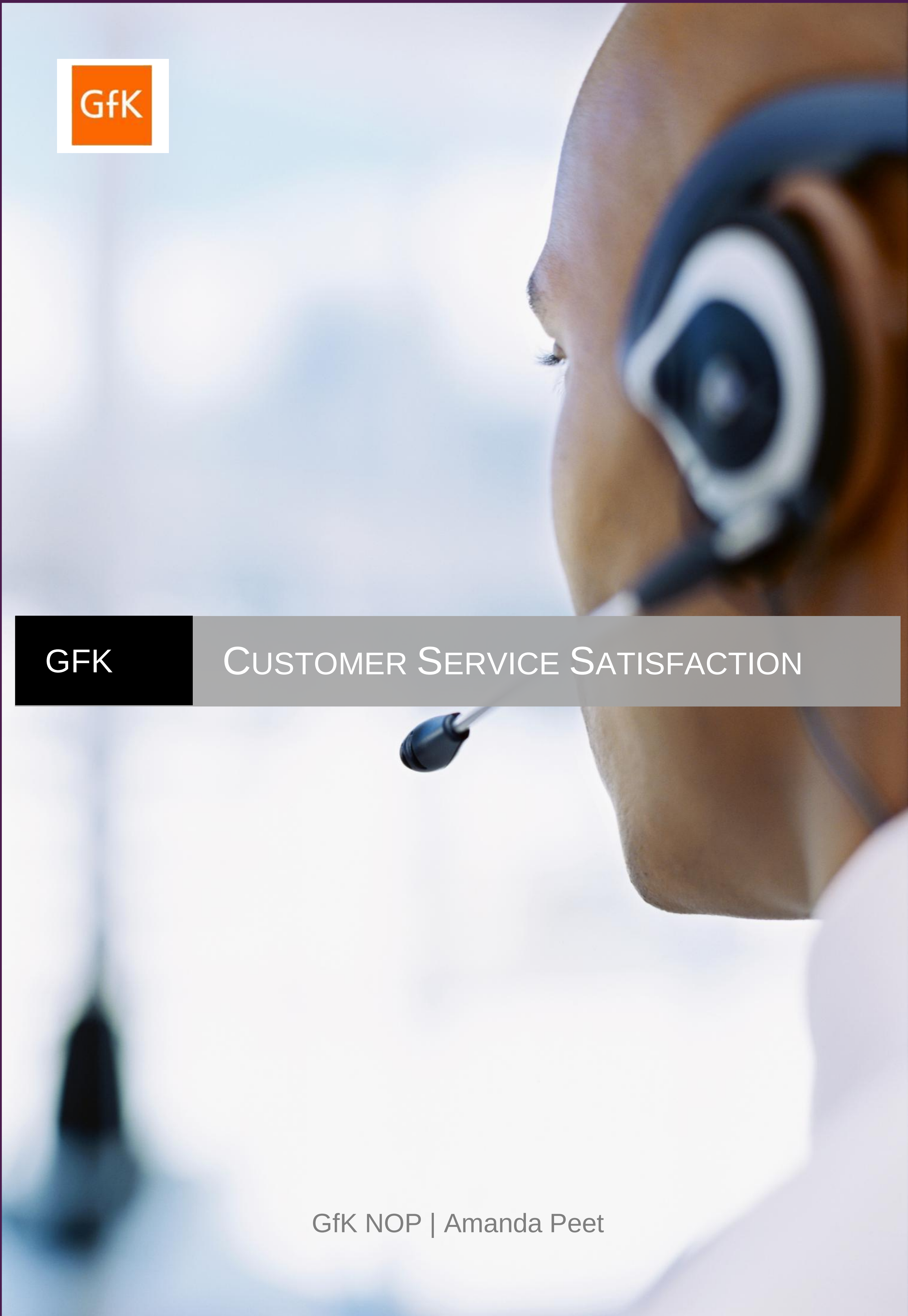

GFK

Customer Service Satisfaction

GfK NOP | Amanda Peet

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Executive Summary

Background

- Ofcom (Office of Communications) is the regulator for the UK communications industries, with responsibilities across television, radio, telecommunications and wireless communications services.

- In late 2009, Ofcom commissioned a study on the quality of customer service offered to owners of broadband, mobile, fixed line and pay TV providers, which measured satisfaction with the quality of customer service that they receive from their providers. The results of this research were published in the July 2010 Quality of Service document [see http://stakeholders.ofcom.org.uk/consultations/topcomm/qos-report/]

- In order to track supplier performance and measure changes in performance, GfK conducted a second wave of the research in February 2011; the findings were published in July 2011 [see http://stakeholders.ofcom.org.uk/market-data-research/telecoms-research/quality-of-customer-service/].

- A further wave of the research was conducted in September 2011, the results of which constitute the following report.

- The research reflects consumers' views based on their most recent contact with their provider in the last three months; for the latest wave this period is approximately July to September 2011.

Findings

Overall satisfaction

- UK providers of landline, fixed broadband, mobile and pay TV services continue to provide a reasonably satisfactory contact experience in the majority of cases. Nonetheless, impartial ratings of providers are deemed useful by two thirds of customers who have contacted their provider recently; particularly in the fixed broadband sector and amongst dissatisfied customers. The importance of such ratings has increased in the mobile sector, and amongst satisfied customers, since 2009.

- Satisfaction with customer service remains lower in the fixed broadband (58%) and landline (61%) sectors than for mobile (69%) and pay TV (68%). This is likely to be related to the lower proportion of complaints in the mobile and pay TV sectors, as there is typically more dissatisfaction with complaint resolution; however, dissatisfaction has increased in the mobile and pay TV sectors since 2009.

- Key provider differences in each sector this wave are:
    - **Landline**: Sky slightly stronger than other providers; improvement for TalkTalk since February 2011; slight decline for Virgin Media.
    - **Fixed broadband**: Orange dropped back from lead position; some drop off for Virgin Media; TalkTalk improved since February 2011 (although customers remain less satisfied overall with this provider – not specifically in relation to customer service)
    - **Mobile**: O2 marginally stronger; Three and Virgin Mobile rated less well.

- **<u>Pay TV</u>**: Sky customer service rated better; increase in dissatisfaction and declining loyalty for Virgin Media since 2009.

- Ratings of various aspects of providers' customer service have generally improved since 2009, with the exception of Virgin Media (landline and pay TV), Virgin Mobile and Three.

Impact on loyalty:

- Delivery on customer service appears to have a direct impact on customer loyalty: Greater loyalty for O2 in the mobile sector is being driven by its above-average customer service advice, while weaker performances by Virgin Media (landline and pay TV), Orange broadband, Virgin Mobile and Three have resulted in reduced likelihood of customers remaining with those providers.

Contact profiles (number of enquiries and/ or complaints):

- There are relatively fewer contacts to landline providers, compared with other sectors. Contacts to fixed broadband providers are more likely to be considered complaints, while there are fewer complaints in the mobile and pay TV sectors. There is some variation in the overall profile of contacts by sector, with a greater proportion of billing queries in the landline sector and more faults enquiries in the fixed broadband sector (reflected in the higher level of complaints), while 'general' queries are more dominant in the mobile and pay TV sectors.

Issue resolution:

- Around 90% of issues are seen as completely or at least partially resolved, although in many cases this requires more than one contact; particularly for faults. Faults in the mobile and fixed broadband sectors (typically poor reception and slow connection speed, respectively), and fixed broadband billing queries, are least well resolved.

Objectives and Methodology

Research Aim

To quantify levels of satisfaction with customer experience among the leading communications providers in the UK, to understand whether performance varies depending on the type of issue being dealt with, and to evaluate changes over time by market and provider.

Methodology

The study was divided into two stages, using the same methodologies as in waves 1 and 2, as follows:

Stage 1:

- 3,000 interviews were undertaken on GfK's weekly nationally representative telephone omnibus to establish a robust profile of the issues (Billing/ Fault/ General) that consumers raise with their communications providers.

- This profile was used to weight the online survey data to the profile of contacts for each provider (within service). It is considered necessary to conduct this weighting for each wave of the research, as the weighting of events by provider within sector varies over time.

- In terms of the profile of contacts, the results of this third wave of research were broadly comparable to those seen in previous waves, which gives us confidence that the sample is broadly representative of the types of consumers and contacts being made to each supplier. The results of the 2009 research can be seen at: http://stakeholders.ofcom.org.uk/consultations/topcomm/qos-report/ and the results of the February 2011 research can be found at: http://stakeholders.ofcom.org.uk/market-data-research/telecoms-research/quality-of-customer-service/

Stage 2:

- An online panel survey was completed amongst consumers who had contacted their service provider(s) in the last three months. Between 1,300 and 2,700 customer service events were identified within each of the four service areas: landline, broadband, mobile and pay TV.

- These events were profiled, and provider performance rated, for relevant aspects of individual customer service experiences.

- The methodology for all three waves was identical, although there were minor changes to the questionnaire between wave 1 (Oct 2009) and 2 (Feb 2011), as follows:
    - In wave 2, Tiscali was combined with TalkTalk as a fixed broadband provider (the use of Tiscali as a stand-alone brand ceased in January 2010). Tiscali and Talk Talk data for wave 1 was netted for comparative purposes.
    - The list of customer service attributes for rating was reduced from 20 to 16, following regression analysis to determine which statements were most important in driving customer satisfaction.

GfK

- A question was added about whether the contact was a complaint.

- For reporting purposes, differences over time and against the total market (‘overall’ i.e. the average of all the results in the chart combined) are noted in the report only when they are significantly different. Differences have been reported at the 99% confidence level, meaning that we are 99% certain that there is a real difference between the two findings.

- Where a September 2011 result is significantly different to the average for that market or sector, the difference is indicated with a green circle (result significantly higher) or a red box (result significantly lower). Differences over time (between February and September 2011) are indicated by a green up arrow (significant increase) or a red down arrow (significant decrease).

- Significant differences in results between October 2009 and September 2011 (waves 1 and 3) have been indicated in the text only.

Overview of all sectors

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

Recent contact with provider

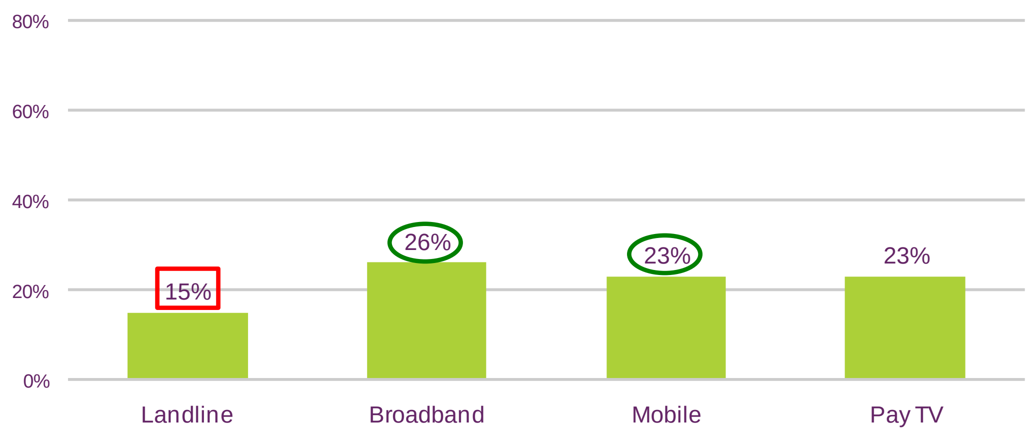
Figure 1.1 (below) shows the proportion of customers who had contacted their service provider in the previous three months. These percentages are based on data from the GfK omnibus survey.

There have been no significant changes since February 2011, although since 2009, the proportion of customers contacting their broadband provider has increased (from 17%).

The chart shows that the incidence of contact amongst landline customers was significantly lower than the total market, while the proportion of customers contacting their fixed broadband and mobile providers was above average.

NB: Sample size affects the significance testing in that the larger the sample the greater confidence we have. The sample for mobile customers is larger than the sample for pay TV customers. As a result the pay TV data has larger margins of error and so we cannot be confident that this figure is higher than average. This explains why the proportion of mobile contacts (at 23%) is significantly higher than average but the proportion of pay TV contacts (also at 23%) is not.

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



Q6: Thinking of [PROVIDER] and the services you buy from them, have you contacted them in the last three months by phone/ email…?

Base: All UK households using providers: landline 2,663, broadband 2,102, mobile 2,304, pay TV 1,583.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: GfK Omnibus survey

Type of contact with provider

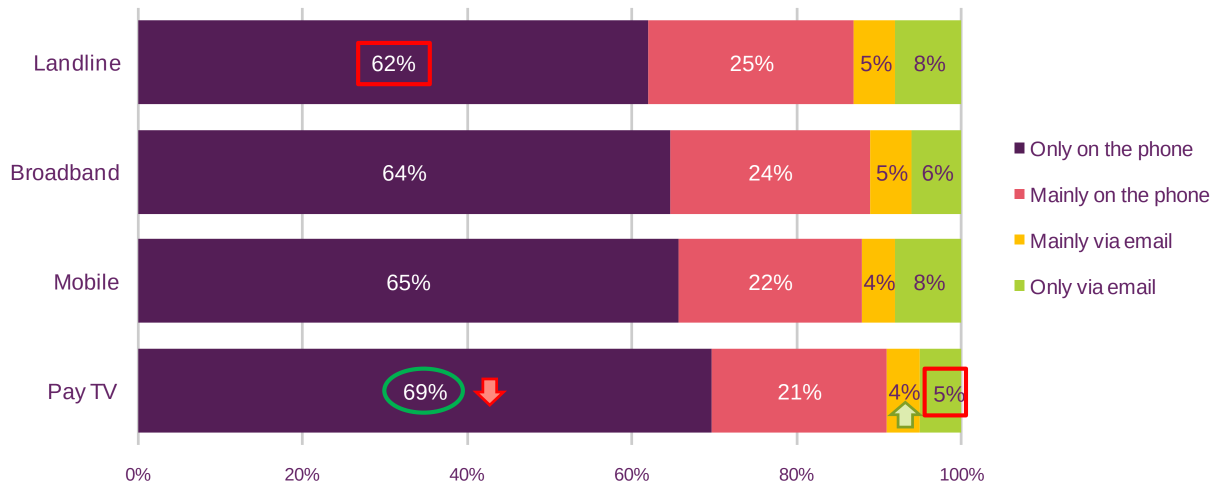
Figure 1.2 (below) shows the way in which customers contacted their service providers.

Compared with February 2011, fewer pay TV customers had made only telephone contact (a decrease from 75% to 69%), and more had made contact mainly via email (up to 4% compared with 2% in Feb 2011).

Since 2009, the proportion of fixed broadband customers contacting their provider by phone only was up (from 60% to 64%), and there was an increase in landline customers contacting solely by email (from 5% in 2009 to 8% in September 2011).

While the majority of customers in all sectors made contact solely or mainly by telephone, pay TV customers remained more likely, and landline customers less likely, to contact only by phone, compared with the market average. Pay TV customers were also less likely than average to contact only via email.

Figure 1.2: Type of contact made most recently



Q2: In dealing with [PROVIDER] about this, did you contact them…?

Base: All UK households contacting provider: landline 1,620, broadband 2,400, mobile 2,680, pay TV 1,729.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

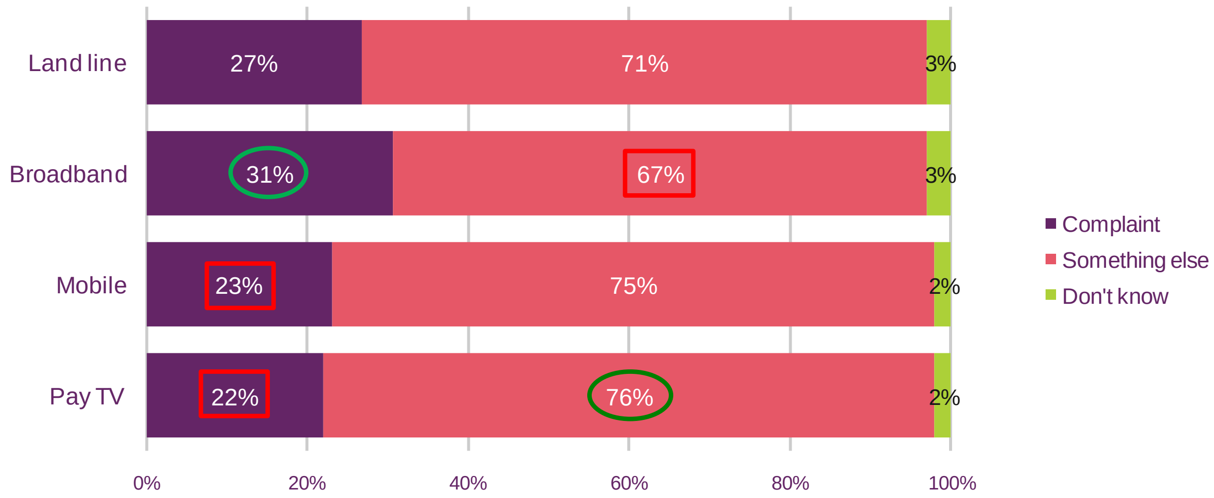
Proportion of complaints

Figure 1.3 (below) shows the proportion of recent contacts to providers that were considered by customers to be complaints.

The results of this question were similar to those seen in February 2011. *NB: the question to determine complaints was not asked in 2009.*

At least a fifth of contacts in each sector were complaints. The proportion of complaints in the fixed broadband sector was higher than average, whilst mobile and pay TV customers were less likely than average to say that their contact was a complaint.

Figure 1.3: Whether recent contact was regarding a complaint



Q5a: And in your opinion, was the reason for this contact with [PROVIDER] a complaint, or something else?

Base: All UK households contacting provider: landline 1,620, broadband 2,400, mobile 2,680, pay TV 1,729.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Reason for recent contact with provider

Figure 1.4 (below) shows the type of issue about which customers were contacting their service providers.

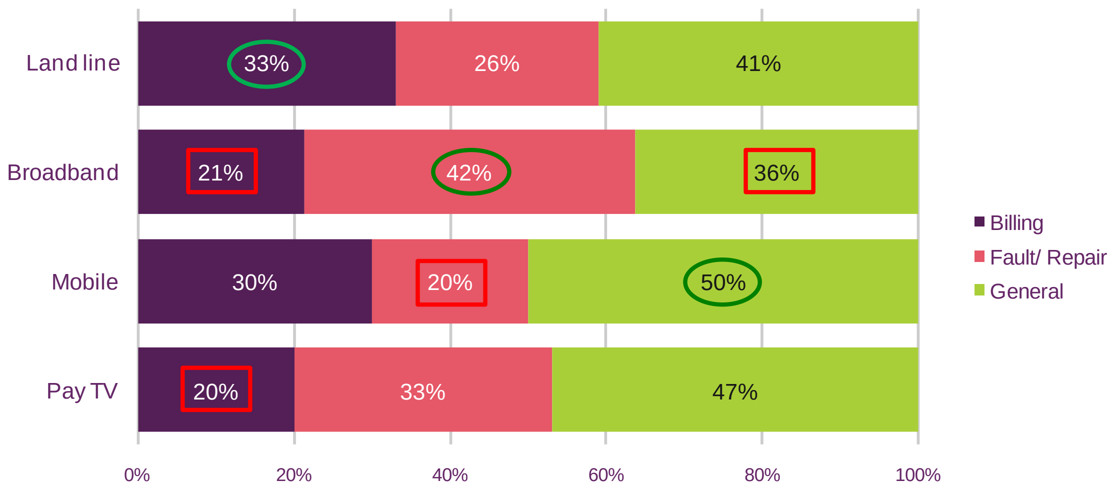
Contact profiles were categorised under billing, faults and general. ‘Faults’ covers fault and repair issues whilst ‘general’ covers all other enquiries not related to billing, faults or repairs. The three groups captured all the issues being dealt with by providers whilst helping to understand how the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

Overall, the type of contact by sector is similar to that seen in February 2011 and in 2009.

Landline customers were significantly more likely than average to have called about billing issues, while fixed broadband customers were more likely to have called about faults. ‘General’ issues were more common than average - and faults less common - in the mobile sector. Pay TV and fixed broadband customers were less likely than average to call 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 exactly reflect the actual calls received by the respective providers over the specified period.

Figure 1.4: Type of issue of most recent contact



Q3: 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 409, broadband 537, mobile 534, pay TV 369.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: GfK Omnibus survey

Degree of resolution of issue by provider

Figure 1.5 (below) shows, by issue type, whether the issue that customers were contacting their service provider about had been resolved.

Overall, there were no significant differences in levels of call resolution compared with those seen in February 2011 and in 2009.

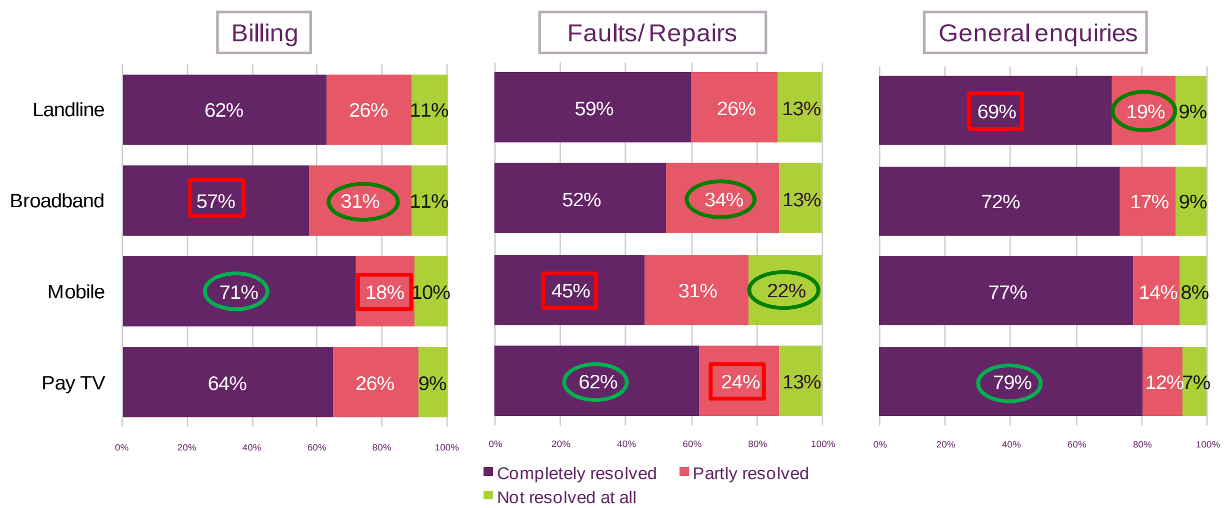
The majority of issues in all sectors had been completely resolved, although general enquiries were more likely to have been completely resolved than billing or faults issues.

Amongst those with billing issues, mobile customers were more likely than average, and fixed broadband customers less likely, to have had their issue completely resolved.

For faults issues, mobile customers were less likely than average, and pay TV customers more likely, to have had full resolution. Mobile customers were also more likely not to have had their faults issues resolved at all.

Where the enquiries were of a general nature, landline customers were less likely, and pay TV customers more likely, to have had their issue fully resolved.

Figure 1.5: Whether issue has been 'resolved'



Q5: In your opinion, was [PROVIDER] able to successfully resolve your issue [Billing/Fault/General]?

Base: All UK households contacting provider [billing/fault/general enquiry]: landline 719/402/499, broadband: 632/1,127/641, mobile 813/489/1,111, pay TV 531/536/662.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

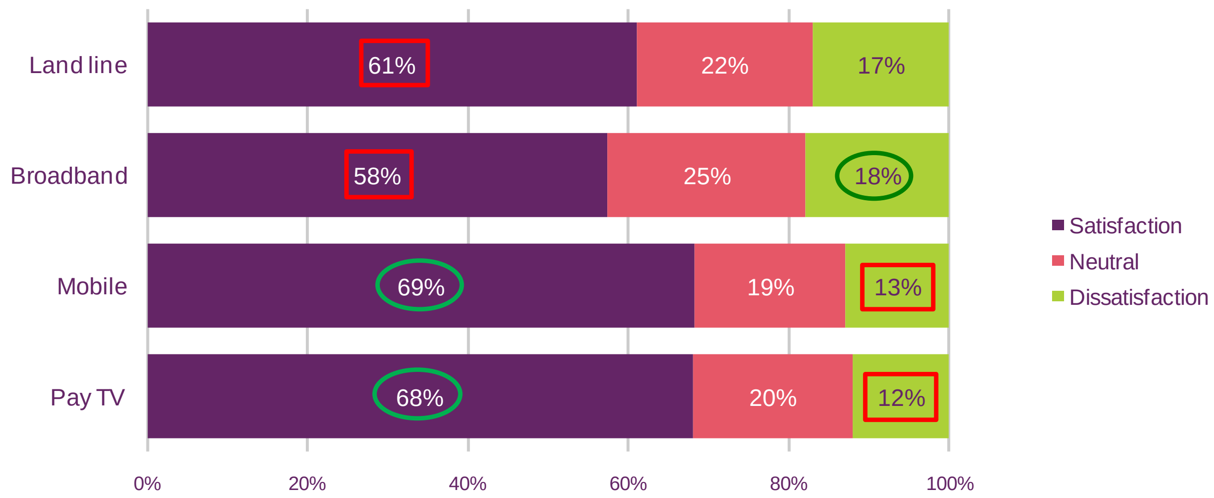
Satisfaction with provider's customer service

Figure 1.6 (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.

There were no significant changes in satisfaction levels by sector from February to September 2011. However, compared with 2009, dissatisfaction has increased in the mobile and pay TV sectors (up from 9% in both sectors).

In each sector over half of customers were satisfied with the customer service they had received, but mobile and pay TV customers were significantly more likely than average (and landline and fixed broadband customers correspondingly less likely) to be satisfied.

Figure 1.6: Satisfaction with customer service by sector



Q3: Overall, how satisfied are you with the service you received from [PROVIDER] customer services on this occasion?

Base: All UK households contacting provider: landline 1,620, broadband 2,400, mobile 2,680, pay TV 1,729.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

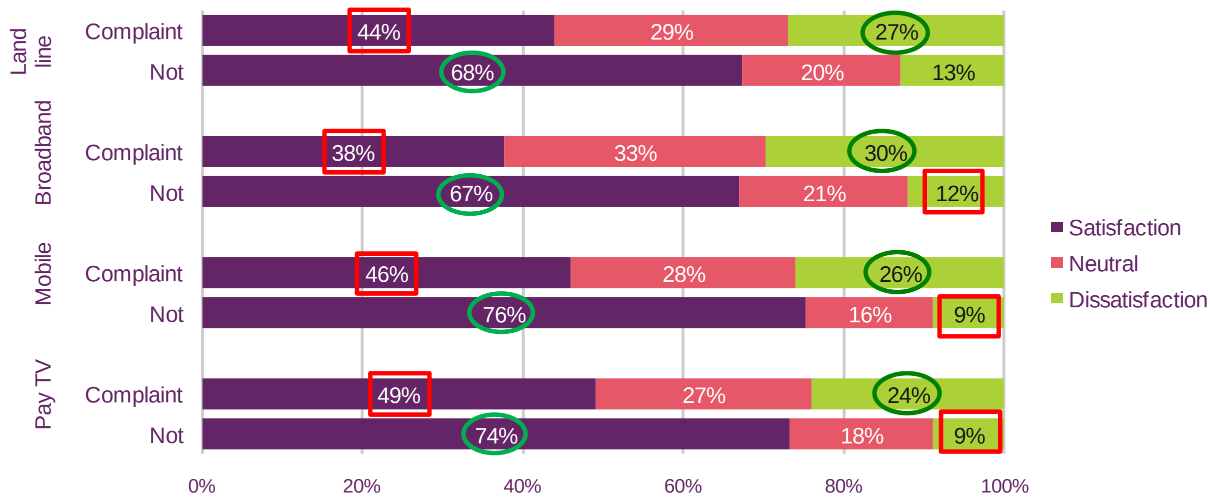
Satisfaction with provider's customer service by whether contact was a complaint

Figure 1.7 (below) shows, for each sector, satisfaction with customer service split by whether or not customers considered their contact to be a complaint.

There was no significant difference in the results for September and February 2011. *NB: the question to determine complaints was not asked in 2009.*

Customers in each sector were less satisfied (and more dissatisfied) when their call was a complaint. Dissatisfaction with non-complaints was lower than the average, except in the landline sector.

Figure 1.7: Satisfaction with customer service by whether recent contact was a complaint



Q3: Overall, how satisfied are you with the service you received from [PROVIDER] customer services on this occasion?

Base: All UK households contacting provider [complaint/ not complaint]: landline (466/1,154), broadband (805/1,595), mobile (655/2,025), pay TV (413/1,316).

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Interest in impartial service rating advice

Figure 1.8 (below) shows customer interest in provision of impartial information about different companies' customer service ratings. As with previous charts, the figures represent only a subsection of consumers; those who had contacted their service provider in the previous three months.

There were no notable changes since February 2011.

However, since 2009, there has been an increase in the proportion of mobile customers who said that impartial information would be important in helping them choose a provider (up from 19% to 23%), and a decrease in those who said they would just 'bear the information in mind' (down from 49% to 43%). There has also been a decline in the proportion of pay TV customers who said they would look at such information but not chose a provider based on it (down from 25% to 19%).

Across all four sectors, around two thirds of customers suggested that they would at least bear such information in mind when choosing a service provider. Broadband customers were less likely than average to say they would not pay attention to it, and were more likely to bear it in mind.

NB: Reported intentions may differ from actual behaviour.

Figure 1.8: Need for impartial information – All services

Q8: If you were provided with customer service ratings for different companies, 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 1,620, broadband 2,400, mobile 2,680, pay TV 1,729.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

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

Interest in impartial service rating advice by satisfaction with service

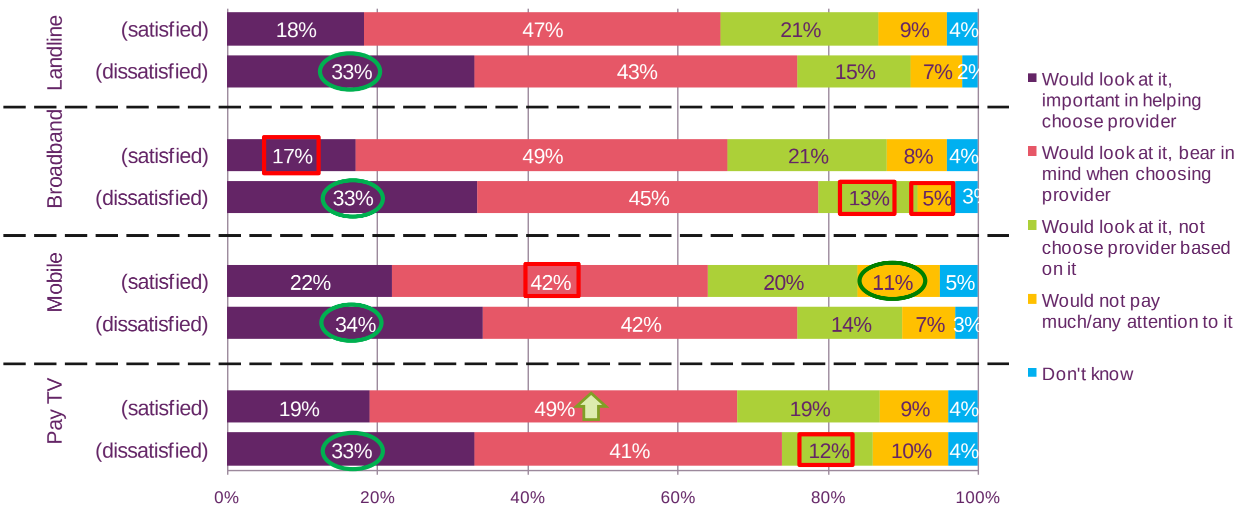
Figure 1.9 (below) also shows interest in impartial information about companies' service ratings, but this time split by satisfied and dissatisfied customers in each sector. Once again, the figures only represent the subsection of consumers who had contacted their service provider in the previous three months.

Since February 2011 there has been an increase in the proportion of satisfied pay TV customers that said they would bear impartial rating information in mind when choosing a provider (up from 43% to 49%). Compared with 2009, the importance of impartial information has increased amongst satisfied customers in all sectors (up from 13% for landline, 12% for broadband, 16% for mobile and 14% for pay TV customers).

But overall, dissatisfied customers in each sector were more likely to say that impartial rating information would be important.

NB: Reported intentions may differ from actual behaviour.

Figure 1.9: Need for impartial information – All services



Q8: If you were provided with customer service ratings for different companies, 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 [satisfied/ dissatisfied]: landline 971/272, broadband 1,350/435, mobile 1,820/341, pay TV 1,155/219.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

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

Landline sector

This section looks specifically at the landline sector, in terms of service providers contacted, issue type, issue resolution, number of contacts, satisfaction and impact on future use.

Executive Summary

- The main reason for contacting any landline provider is to change package or service. Around two-thirds of landline issues are considered fully resolved, with one in ten unresolved. Faults and billing queries are less likely to be fully resolved, and faults continue to require more contacts.

- Virgin Media customers are more likely than average to have contacted their landline provider in the last three months; this level has increased since 2009. Virgin also has poorer resolution of general issues, while TalkTalk customers generally need more contacts to resolve their issues.

- Sky has higher than average satisfaction with its customer service and is rated above average for its willingness to resolve issues, taking issues seriously, and offering compensation. Dissatisfaction with TalkTalk's customer service for complaints has dropped notably, and ratings have improved in many specific areas of customer service since Feb 2011. However, satisfaction with Virgin Media's customer service is below average (lower than in Feb 2011), and Virgin is rated lower on resolving the issue satisfactorily.

- Ratings have generally improved in the landline sector since 2009 for BT, Sky and TalkTalk.

- Loyalty is not markedly different by provider, although fewer Virgin customers say they are 'a little more likely' to stay with their provider due to its customer service.

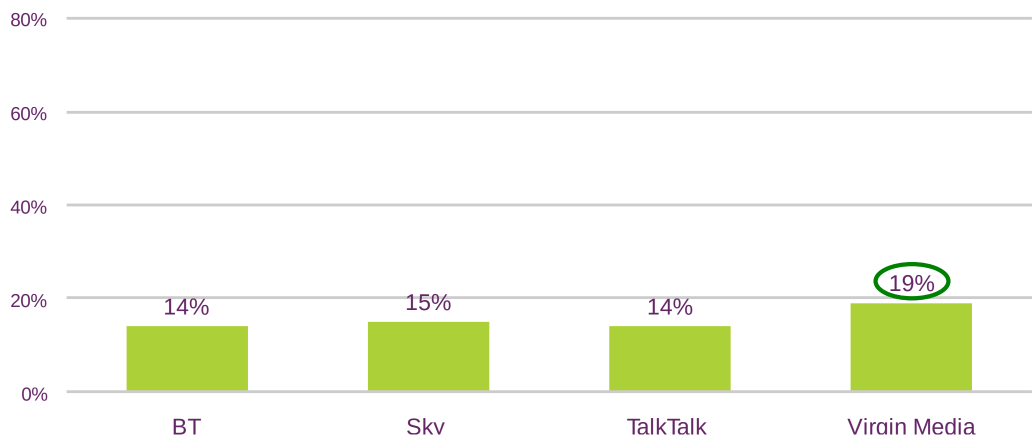
Recent contact with provider

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

Contact levels have not changed significantly compared with February 2011, but the proportion of customers contacting Virgin Media has increased since 2009 (up from 12%).

The proportion of customers contacting Virgin Media was above average for the sector in September 2011.

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



Q6: Thinking of [PROVIDER] and the services you buy from them, have you contacted them in the last three months by phone/ email?

Base: All UK households using landline providers: BT 1,519, Sky 268, TalkTalk 404, Virgin Media 472.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: GfK Omnibus Survey

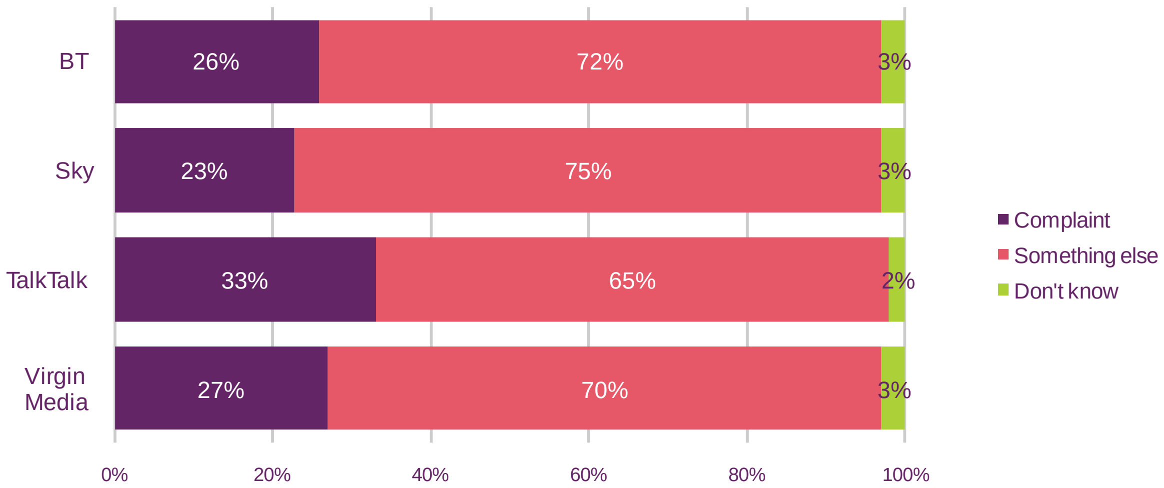
Proportion of complaints

Figure 2.2 (below) shows the proportion of recent contacts to landline providers that were considered by customers to be complaints.

There was no change in the levels of complaints since February 2011. *NB: this question was not asked in 2009.*

Around a quarter of contacts were deemed to be complaints. None of the providers received levels of complaints significantly different to the sector average.

Figure 2.2: Landline – Whether recent contact was regarding a complaint



Q5a: And in your opinion, was this reason for contact with [PROVIDER] a complaint, or something else?

Base: All UK households contacting landline provider: BT 653, Sky 263, TalkTalk 304, Virgin Media 400.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Type of call made most recently with landline provider

Figure 2.3 (below) shows the types of calls made to landline providers.

There was no change in the proportion of different call types to landline providers compared with February 2011, nor with 2009.

In September 2011, Sky had a higher than average proportion of general enquiries.

Figure 2.3: Landline – Type of call made most recently with landline provider

Q8: 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 landline provider: BT 220, Sky 40*, TalkTalk 59, Virgin Media 90.

* indicates a base size lower than 50

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: GfK Omnibus Survey

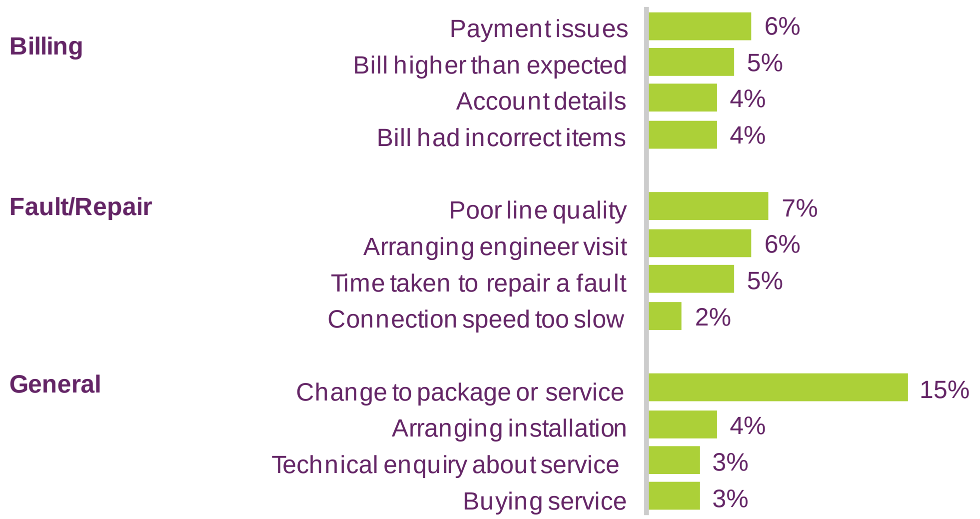
Key issues by contact type

Figure 2.4 (below) shows the most common specific reasons for recent contact with landline service providers. *NB: the results are shown as a proportion of total calls, not as proportions of each type of call.*

There were no significant changes in the reasons for contact compared with February 2011, but enquiries about buying a service have declined since 2009 (from 5% to 3%).

The main reason for contact was to change package or service.

Figure 2.4: Landline - Top four issues per contact type



S7: Which of the following best describes what the issue with [PROVIDER] was concerning?

Base: All UK households contacting landline provider: 1,620.

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

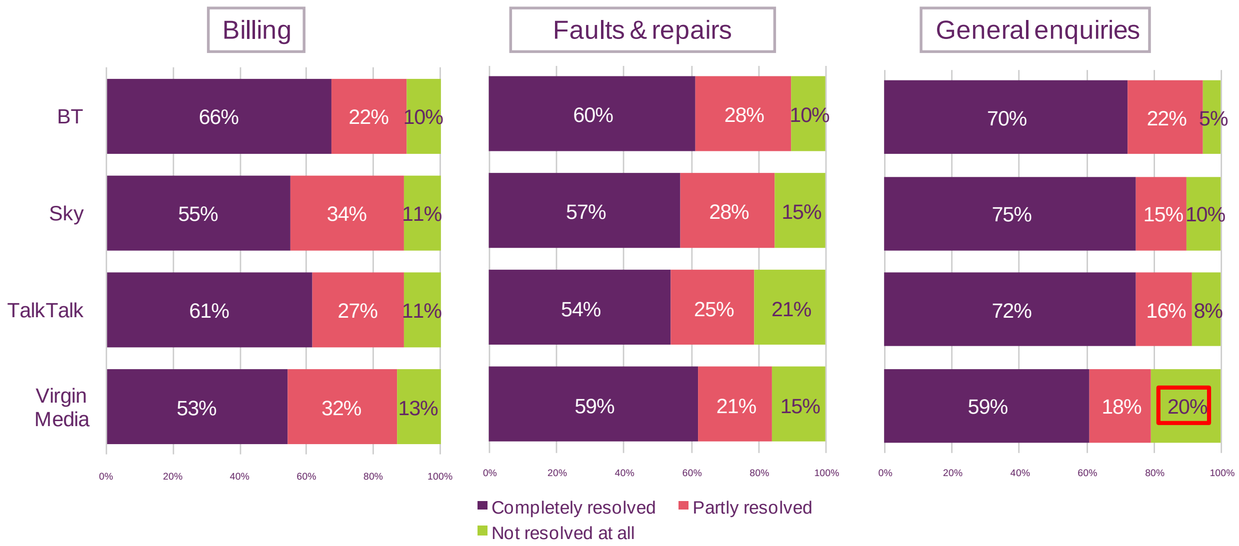
Issue resolution by landline provider

Figure 2.5 (below) shows the degree of issue resolution by landline providers, as perceived by customers.

There have been no significant changes since February 2011, or compared with 2009, in terms of issue resolution.

In the customers' view, general queries were more likely to be completely resolved than billing and faults – with the exception of Virgin Media, which was significantly more likely than average to have unresolved general enquiries.

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



Q5: In your opinion, was [PROVIDER] able to successfully resolve your issue? [Billing/ Faults/ General enquiries]

Base: All UK households contacting landline provider [billing/faults/general enquiries]: BT 310/144/199, Sky 89/75/99, TalkTalk 142/76/86, Virgin Media 178/107/115.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

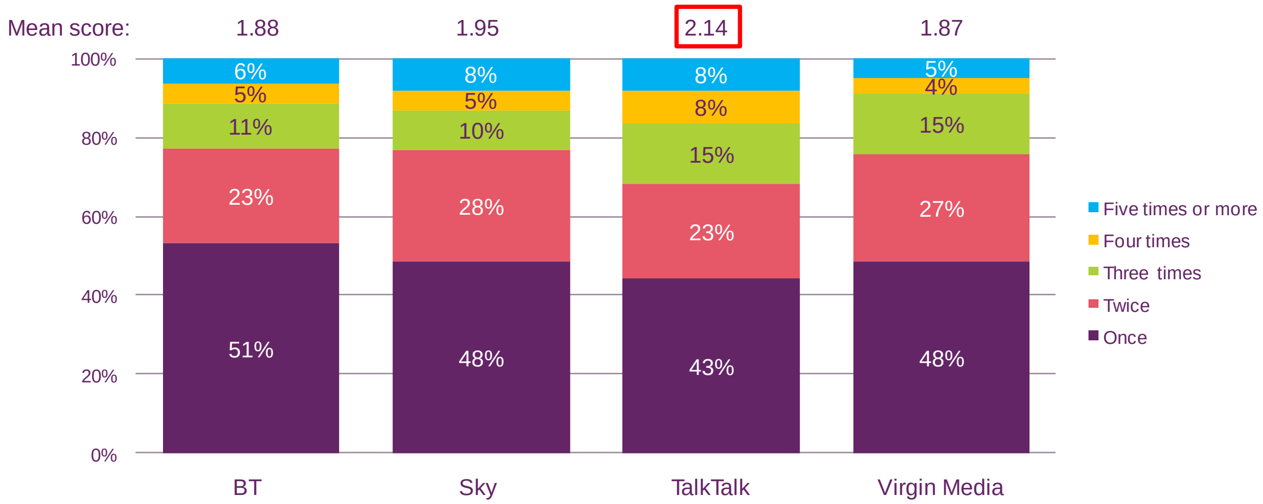
Number of contacts with landline provider

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

There were no changes in contact frequency compared with February 2011, nor with 2009.

On average, fewer than two contacts were required, but TalkTalk customers required significantly more contacts to resolve issues.

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



Q6: How many times have you been in contact with [PROVIDER] in relation to this particular issue so far?

Base: All UK households contacting landline provider: BT 653, Sky 263, TalkTalk 304, Virgin Media 400.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

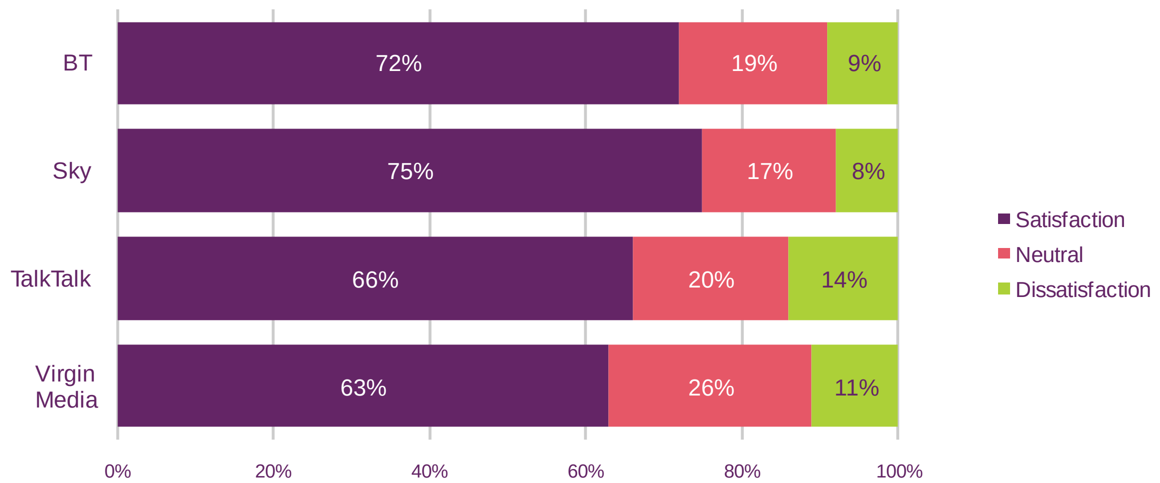
Overall satisfaction with landline provider

Figure 2.7 (below) shows levels of overall satisfaction with landline providers.

There has been no change in satisfaction with providers since February 2011. However, since 2009 satisfaction with BT and TalkTalk has increased (up from 56% and 53% respectively).

Around two thirds of customers were satisfied with their provider, with outright dissatisfaction relatively low. No provider had satisfaction levels significantly different to the average in September 2011.

Figure 2.7: Landline – Overall satisfaction by provider



Q1: Overall how satisfied are you with [PROVIDER] as your provider of [SERVICE] on a 1 to 10 scale?

Base: All UK households contacting landline provider: BT 653, Sky 263, TalkTalk 304, Virgin Media 400.

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

 /  indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

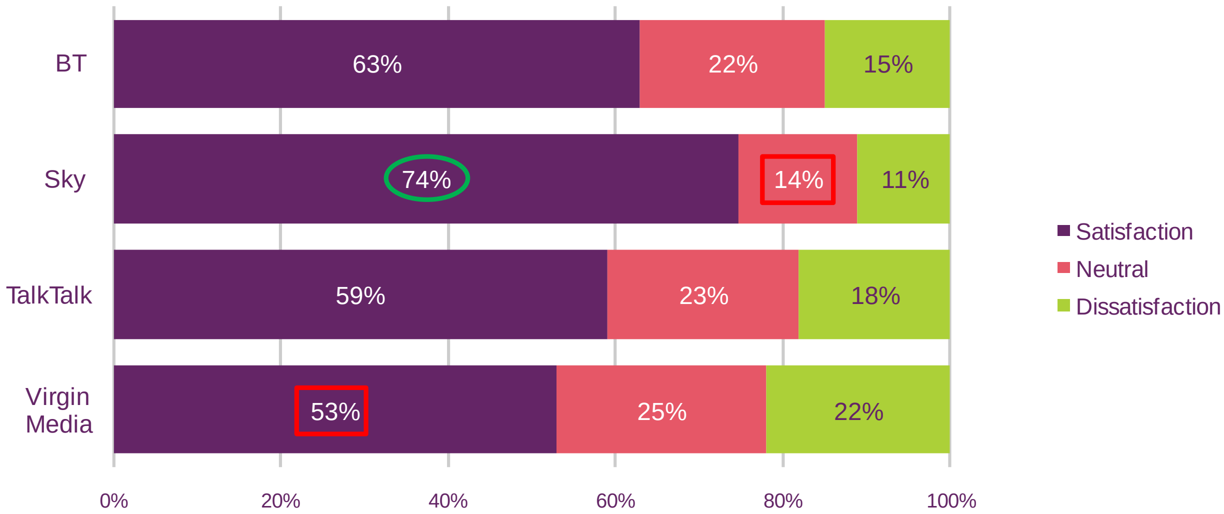
Overall satisfaction with customer service by landline provider

Figure 2.8 (below) shows levels of satisfaction with the customer service of landline providers.

Perceptions of customer service have not changed significantly since February 2011, but since 2009, satisfaction with BT has risen (from 55% to 63%), as has dissatisfaction with Virgin Media (from 12% to 22%).

In September 2011 satisfaction with Sky's customer service was significantly above average, while Virgin Media's satisfaction rating was below average.

Figure 2.8: Landline – Satisfaction with customer service by provider



Q3: Overall, how satisfied are you with the service you received from [PROVIDER] customer services on this occasion?

Base: All UK households contacting landline provider: BT 653, Sky 263, TalkTalk 304, Virgin Media 400.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

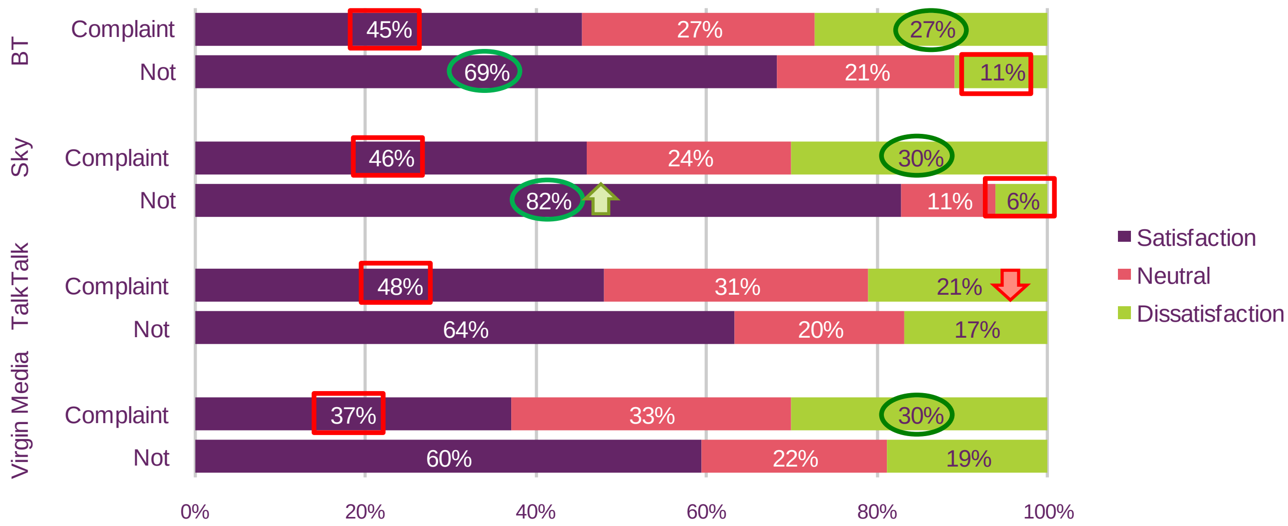
Satisfaction with customer service, by whether contact was complaint

Figure 2.9 (below) shows the level of satisfaction with customer service from landline providers split by whether or not the contact was considered to be a complaint.

Since February 2011 there has been an increase in satisfaction with Sky's customer service for non-complaints (up from 70% to 82%) and a reduction in dissatisfaction with TalkTalk's handling of complaints (from 43% to 21%). *NB: The question to determine complaints was not asked in 2009.*

Dissatisfaction with customer service from landline providers was higher when the contact was a complaint. In September 2011, dissatisfaction was lowest and satisfaction highest for the handling of non-complaints by BT and Sky.

Figure 2.9: Landline - Satisfaction with customer service by complaint or not



Q3: Overall how satisfied are you with the service you received from [PROVIDER] customer services on this occasion?

Base: All UK households contacting provider [complaint/not complaint]: BT 172/481, Sky 72/191, TalkTalk 106/198, Virgin Media 116/284.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Satisfaction with contacting customer service

Figure 2.10 (below) shows mean satisfaction scores on various aspects of contacting customer service, where 10 is extremely satisfied and 1 extremely dissatisfied. *NB: Although some statements regarding ease of contacting were removed from the questionnaire in February 2011, the remaining statements were unchanged and so comparison between years is valid.*

There has been improvement in contacting TalkTalk since February 2011, in terms of ease of finding provider contact details (up from 6.7) and ease of getting through to the right person (up from 5.7).

There has also been general improvement since 2009 for BT, Sky and TalkTalk, on finding contact details (up from 6.6 BT and 6.8 TalkTalk), getting callbacks (up from 5.7 BT, 6.0 Sky, 5.6 TalkTalk, 6.0 Virgin), and getting through to the right person (up from 5.4 BT, 6.1 Sky, 5.6 TalkTalk).

In September 2011 no providers were significantly above or below average for ease of contact.

Figure 2.10: Landline – Satisfaction with contacting customer service

	BT	Sky	TalkTalk	Virgin Media
Ease of finding provider contact details	7.2	7.3	7.3 ⇧	7.3
Calling you back when they said they would	6.6	7.1	6.3	6.6
Ease of getting through to the right person *(phone only)*	6.3	6.8	6.4 ⇧	6.5

Q4: How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied.

Base: All UK households contacting provider landline provider (*by phone*): BT 653 (*561*), Sky 263 (*237*), TalkTalk 304 (*262*), Virgin Media 400 (*350*).

⬭/ ▭ indicates significantly higher/ lower than overall (99% test).

⇧ / ⇩ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Satisfaction with speed of customer service

Figure 2.11 (below) shows mean satisfaction scores on various aspects to do with the speed of customer service.

TalkTalk's speed of customer service has improved since February 2011, on answering phones and handling the issue (both up from 5.9).

Speed of service from BT, Sky and Virgin Media has improved since 2009, specifically on answering phones (up from 5.7, 6.1, 5.7 respectively) and time taken to handle issue (BT and Virgin both up from 5.9).

In September 2011 no providers were significantly above or below average for speed of service.

Figure 2.11: Landline – Satisfaction with the speed of customer service

	BT	Sky	TalkTalk	Virgin Media
Speed of answering phones *(phone only)*	6.5	6.8	6.4 ⇧	6.4
The time taken to handle issue	6.6	6.7	6.5 ⇧	6.4

Q4: How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied.

Base: All UK households contacting landline provider (*by phone*): BT 653 (*561*), Sky 263 (*237*), TalkTalk 304 (*262*), Virgin Media 400 (*350*).

⬭/ ☐ indicates significantly higher/ lower than overall (99% test).

⇧ / ⇩ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Satisfaction with advice from customer service

Figure 2.12 (below) shows mean satisfaction scores for the standard of advice from customer service.

Compared with February 2011, TalkTalk has strengthened its clarity of advice (from 6.2 to 6.8). BT and TalkTalk have improved across the board since 2009, specifically in terms of easy to understand advice (from 6.2 and 6.3 respectively), usefulness of advice (both from 6.1) and getting the issue resolved (from 6.1 and 5.9 respectively).

In September 2011, Virgin Media was rated below average on satisfactorily resolving issues.

Figure 2.12: Landline – Satisfaction with the standard of advice from customer service

	BT	Sky	TalkTalk	Virgin Media
Advice/information was easy to understand	7.1	7.3	6.8 ⇧	6.9
Advice/information was useful	6.9	7.2	6.6	6.5
Getting the issue resolved to your satisfaction	7.0	7.0	6.5	$\boxed{6.4}$

Q4: How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied.

Base: All UK households contacting landline provider: BT 653, Sky 263, TalkTalk 304, Virgin Media 400.

◯/ ☐ indicates significantly higher/ lower than overall (99% test).

⇧ / ⇩ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Satisfaction with customer service adviser

Figure 2.13 (below) shows mean satisfaction with the customer service adviser.

There has again been some improvement for TalkTalk since February 2011, both in keeping the customer informed (from 6.2 to 6.7) and logging query details (from 5.7 to 6.4).

Compared with 2009 there has been improvement for BT, Sky and TalkTalk in the following areas: understanding the issue (from 6.3, 6.8 and 6.1 respectively), keeping the customer informed (from 6.2, 6.8 and 6.1 respectively), doing what they promised (from 6.3, 7.0 and 6.4 respectively), and logging details (from 5.8, 6.3 and 5.8 respectively). There has been improvement for BT and Talk Talk on courtesy and politeness (up from 6.9 and 7.0 respectively) and BT has also strengthened in terms of taking the issue seriously (up from 6.6). Virgin Media strengthened on courtesy and politeness of advisers (up from 7.1).

In September 2011, Sky was rated significantly above average in terms of taking the issue seriously.

Figure 2.13: Landline – Satisfaction with the adviser of customer service

	BT	Sky	TalkTalk	Virgin Media
Courtesy and politeness of advisers	7.7	8.0	7.6	7.6
Adviser ability to understand the issue and identify the problem	7.1	7.5	6.7	7.0
Adviser took my questions/ issue seriously	7.4	7.8	7.0	7.2
Keeping you informed throughout the process	7.0	7.3	6.7 ⇧	6.8
Adviser doing what they say they would do	7.2	7.5	6.9	7.1
Logging of query details to avoid having to repeat yourself	6.7	7.1	6.4 ⇧	6.6

Q4: How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied.

Base: All UK households contacting landline provider: BT 653, Sky 263, TalkTalk 304, Virgin Media 400.

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

⇧ / ⇩ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Satisfaction with other aspects of customer service

Figure 2.14 (below) shows mean satisfaction scores for more general customer service attributes.

Sky and TalkTalk have both improved their ratings on offering compensation since February 2011 (up from 5.7 and 4.2 respectively).

Compared with 2009, BT, Sky and TalkTalk are now rated higher in terms of offering compensation (up from 4.3, 5.1 and 4.6 respectively). BT and Sky have also improved on willingness to help (from 6.4 and 7.0 respectively).

Sky's ratings on both aspects were above average in September 2011.

Figure 2.14: Landline – Satisfaction with <u>other aspects</u> of customer service

	BT	Sky	TalkTalk	Virgin Media
Offering compensation or a goodwill payment	5.0	6.2 ⇧	5.1 ⇧	5.2
Willingness to help resolve your issue	7.2	7.6	6.8	7.0

Q4: How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied.

Base: All UK households contacting landline provider: BT 653, Sky 263, TalkTalk 304, Virgin Media 400.

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

⇧ / ⇩ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

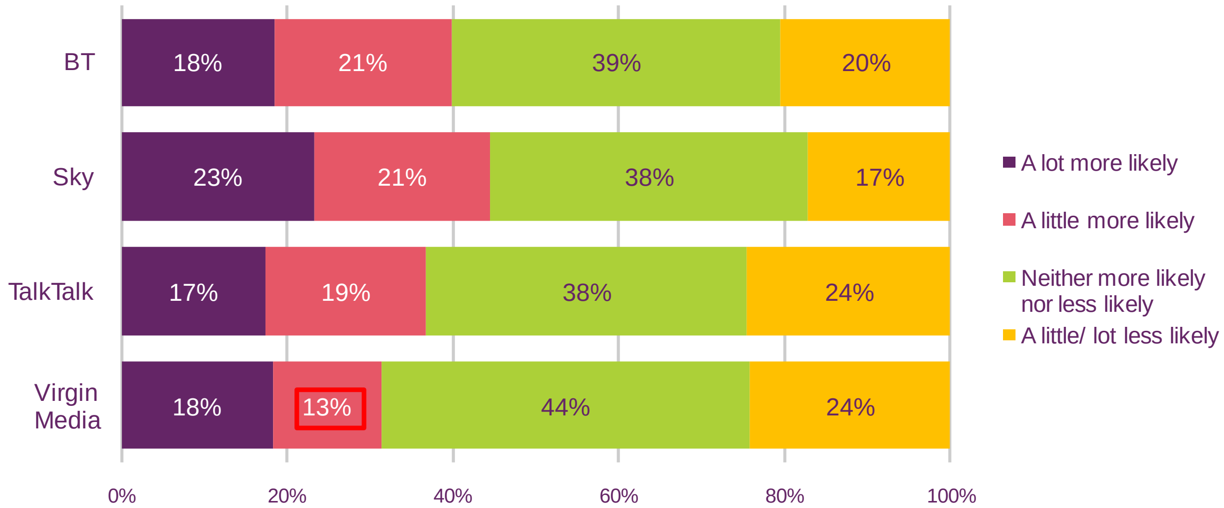
Future use of provider given customer service experience

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.

There are no significant differences in levels of claimed loyalty to landline providers compared with either February 2011 or 2009.

In September 2011 the only notable difference between providers was that fewer than average Virgin Media customers said they were 'a little more likely' to stay with their provider based on recent customer service.

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



Q7: 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 landline provider: BT 653, Sky 263, TalkTalk 304, Virgin Media 400.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Fixed broadband sector

This section looks specifically at the fixed broadband sector, in terms of service providers contacted, issue type, issue resolution, number of contacts, satisfaction and impact on future use.

Executive Summary

- The main reason for contacting a fixed broadband provider is connection speed, followed by package or service change. Billing and faults issues are less likely to be fully resolved, and faults require more contacts with the provider – particularly compared with general issues. General issues are better resolved (although Virgin Media is weaker in this area).

- There has been an increase in customer contacts to Virgin Media since February 2011, and dissatisfaction with the provider has increased over the same period.

- The proportion of contacts to Orange that are complaints has increased since February 2011, and is now similar to that of other providers. At the same time, satisfaction with Orange's customer service has dropped back to a similar level to that of other providers, and there has been a decline in Orange advisers' ratings on usefulness of information, keeping the customer informed and resolving the issue satisfactorily.

- Overall satisfaction with TalkTalk remains lower than average for the sector; however, dissatisfaction with its customer service for complaints has reduced, and there has been improvement in many areas of TalkTalk's customer service since February 2011. Ratings of broadband providers in most areas of customer service are higher than in 2009.

- In line with changes noted above, likelihood of remaining with provider has dropped back for Orange since Feb 2011, and levels are now similar across all the main providers.

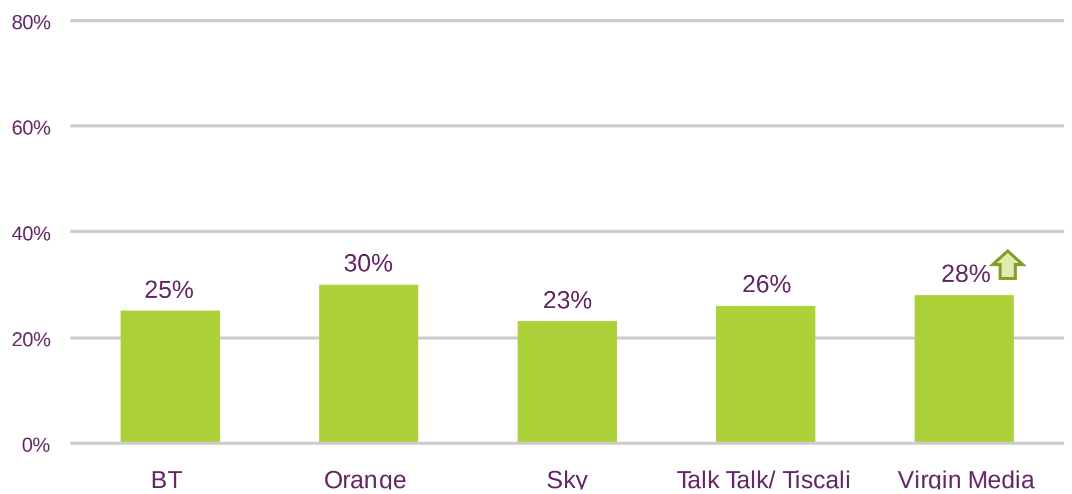
Recent contact with provider

Figure 3.1 (below) shows the proportion of customers of different fixed broadband providers that contacted their provider in the last three months.

The proportion of Virgin Media customers contacting their provider increased from February to September 2011 (from 20% to 28%). Compared with 2009, levels of contact have increased amongst BT, Orange and Virgin broadband customers (up from 18%, 13% and 13% respectively).

Contact levels were generally higher than those for landline providers, but no providers had contact levels significantly different to the sector average.

Figure 3.1: Fixed broadband – Proportion of customers that contacted their fixed broadband provider about an issue in the last three months



Q6: Thinking of [PROVIDER] and the services you buy from them, have you contacted them in the last three months by phone/ email?

Base: All UK households using broadband providers: BT 776, Orange 94, Sky 341, TalkTalk 412, Virgin Media 479.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: GfK Omnibus Survey

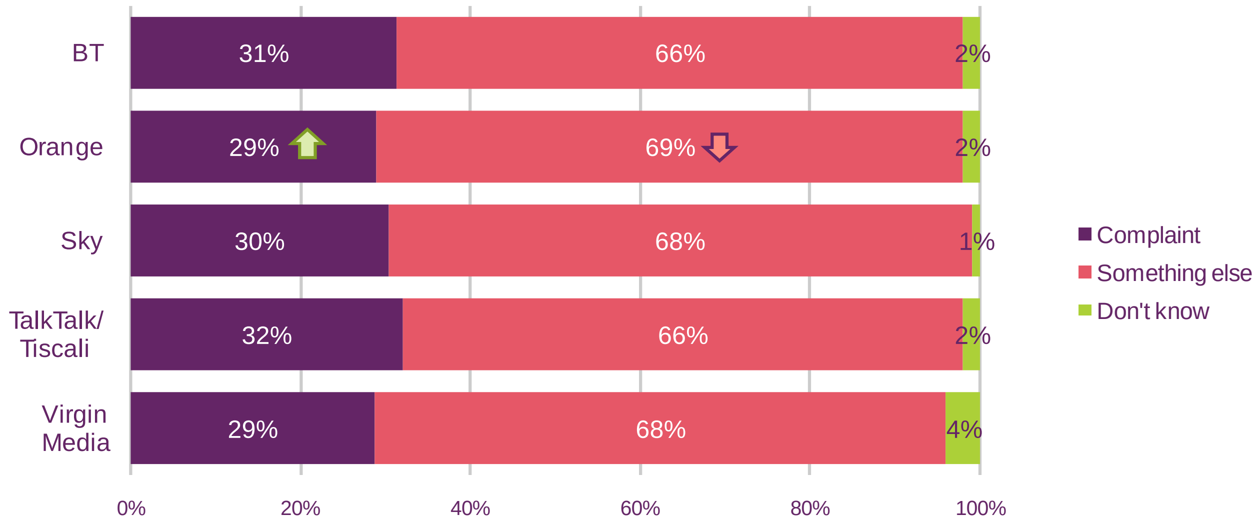
Proportion of complaints

Figure 3.2 (below) shows the proportion of recent contacts that were considered by customers to be complaints.

The proportion of Orange complaints has increased since February 2011 (from 15% to 29%). *NB: This question was not asked in 2009.*

In September 2011 all broadband providers received a similar proportion of complaints.

Figure 3.2: Fixed broadband – Whether recent contact was regarding a complaint



Q5a: And in your opinion, was the reason for this contact with [PROVIDER] a complaint, or something else?

Base: All UK households contacting broadband provider: BT 533, Orange 251, Sky 472, TalkTalk 498, Virgin Media 646.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

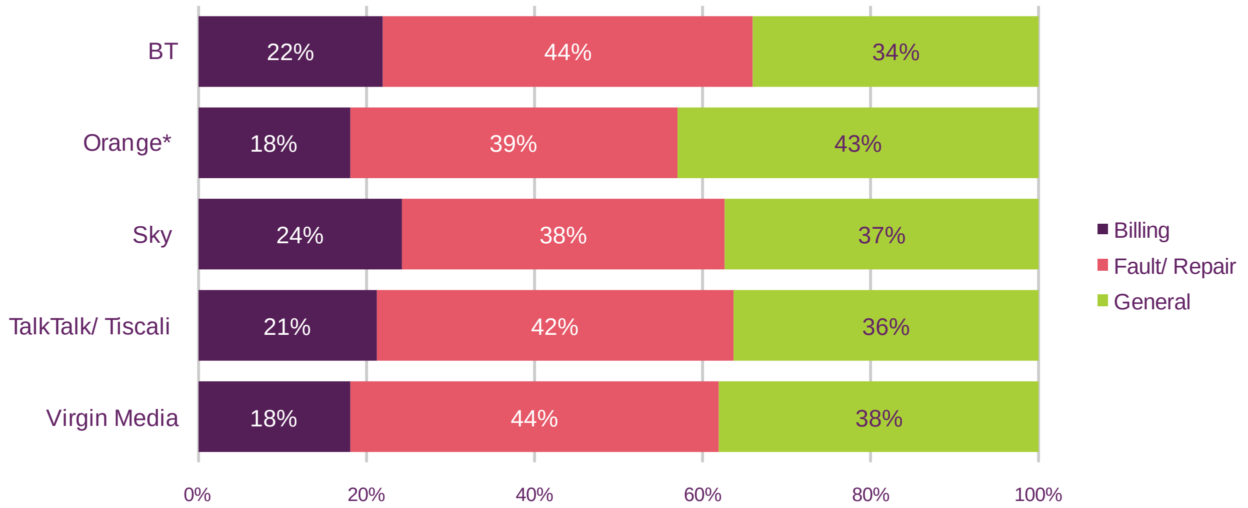
Type of call made most recently with fixed broadband provider

Figure 3.3 (below) shows the types of calls made to broadband providers.

There were no significant changes versus February 2011 or 2009 in the proportions of each type of call made to providers.

Billing queries were least common amongst all providers; there were no differences from average for any provider.

Figure 3.3: Fixed broadband – Type of call made most recently with broadband provider



Q8: 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 broadband provider: BT 191, Orange 28*, Sky 78, TalkTalk 107, Virgin Media 133.

* indicates a base size lower than 50

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: GfK Omnibus Survey

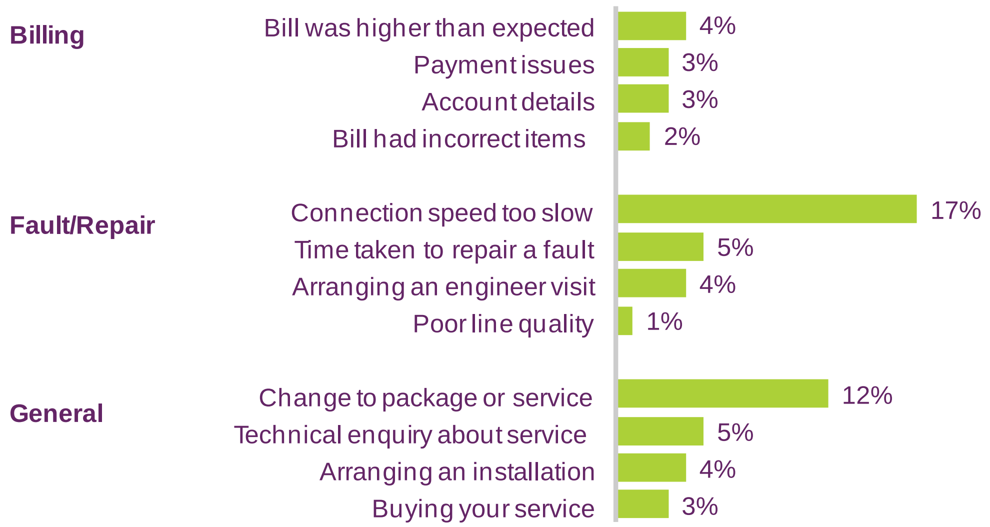
Key issues by contact type

Figure 3.4 (below) shows the most common specific reasons for recent contact with fixed broadband service providers. *NB: the results are shown as a proportion of total calls, not as proportions of each type of call.*

There was no change in reasons for contact since February 2011, although compared with 2009 there were fewer technical enquiries (down from 9% to 5%).

The most common reason for contact with a broadband provider remained slow connection speed, followed by changing package or service.

Figure 3.4: Fixed broadband - Top four issues per contact type



S7: Which of the following best describes what the issue with [PROVIDER] was concerning?

Base: All UK households contacting broadband provider: 2,400.

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

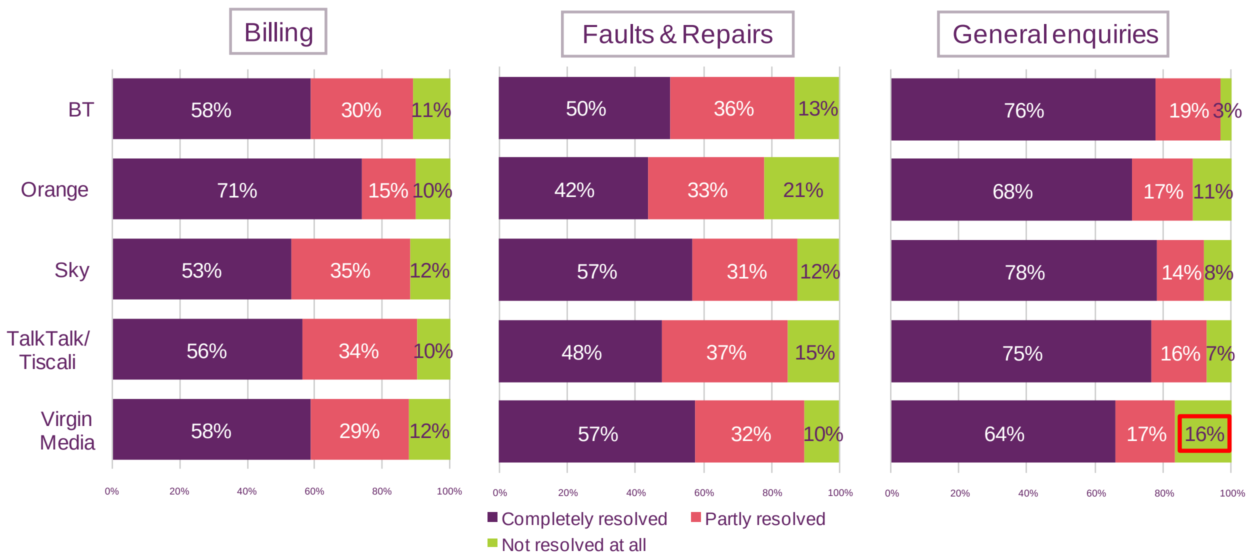
Issue resolution by fixed broadband provider

Figure 3.5 (below) shows the degree of issue resolution by fixed broadband providers, as perceived by customers.

The only significant change over time in levels of issue resolution in this sector, is an increase in partial resolution of billing issues by TalkTalk since 2009 (from 19% to 34%).

In the customers' view, general queries are more often completely resolved, while faults are least likely to be resolved. The only difference by provider in September 2011 was that Virgin Media was below average at resolving general issues.

Figure 3.5: Fixed broadband – Whether issue is seen as 'resolved'



Q5: In your opinion, was [PROVIDER] able to successfully resolve your issue? [Billing/ Faults/ General enquiries]

Base: All UK households contacting broadband provider [billing/faults/general enquiries]: BT 149/234/150, Orange 52/124/75, Sky 125/222/125, TalkTalk 142/233/123, Virgin Media 164/314/168.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

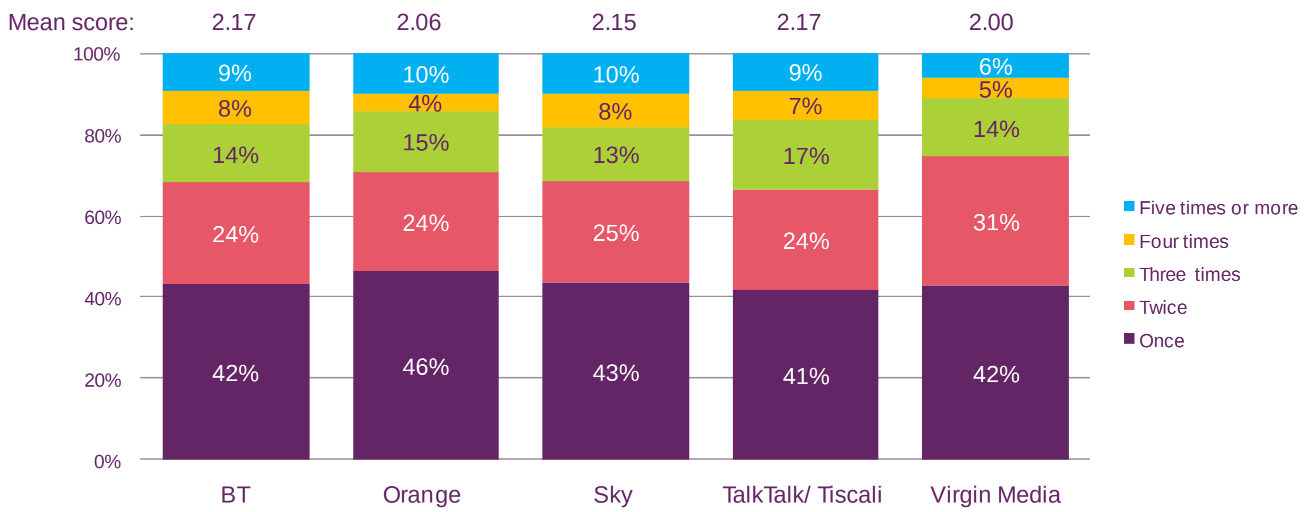
Number of contacts made to service provider

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

There were no significant differences compared with February 2011 or with 2009 in terms of the number of contacts to providers.

A similar number of contacts were made by customers of all broadband providers.

Figure 3.6: Fixed broadband – Number of contacts made, by provider



Q6: How many times have you been in contact with [PROVIDER] in relation to this particular issue so far?

Base: All UK households contacting provider broadband provider: BT 533, Orange 251, Sky 472, TalkTalk 498, Virgin Media 646.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

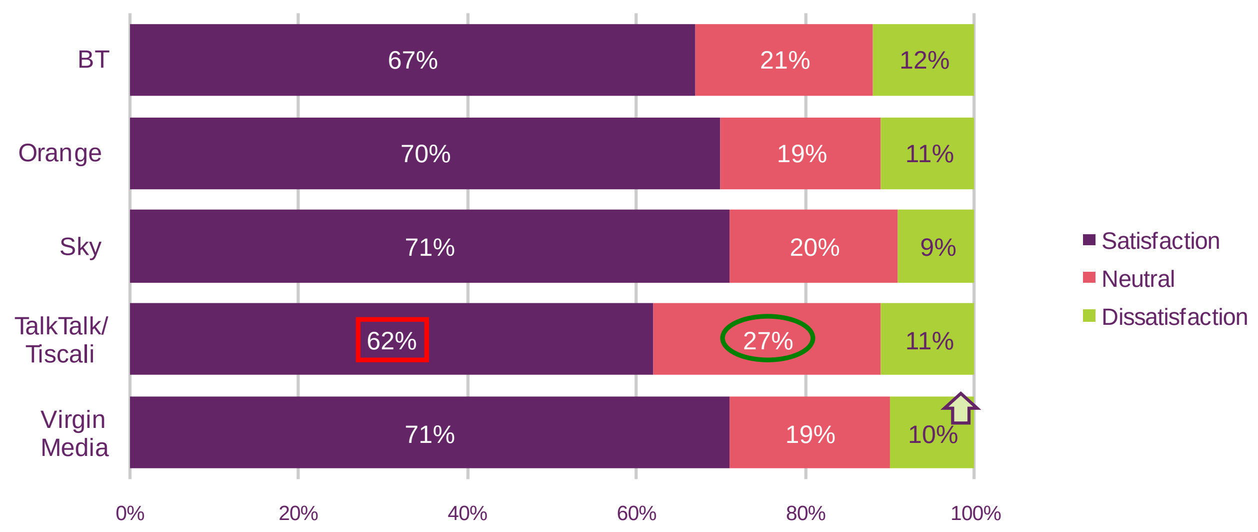
Overall satisfaction by provider

Figure 3.7 (below) shows levels of overall satisfaction with fixed broadband providers.

Dissatisfaction with Virgin Media has increased since February 2011 (up from 5%). Compared with 2009, satisfaction with Orange has increased (from 40% to 70%).

In September 2011, overall satisfaction with TalkTalk remained below average.

Figure 3.7: Fixed broadband – Overall satisfaction by provider



Q1: Overall how satisfied are you with [PROVIDER] as your provider of [service] on a 1 to 10 scale?

Base: All UK households contacting broadband provider: BT 533, Orange 251, Sky 472, TalkTalk 498, Virgin Media 646.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

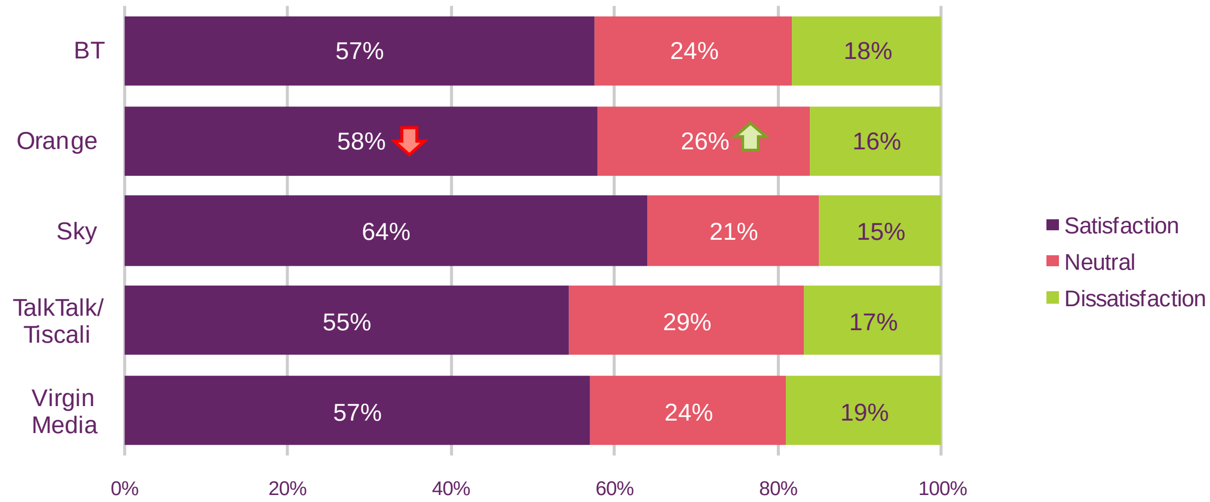
Overall satisfaction with customer service by provider

Figure 3.8 (below) shows levels of satisfaction with the customer service of fixed broadband providers.

Satisfaction with Orange customer service has fallen since February 2011 (down from 76%), although is still above that seen in 2009 (up from 42%).

In September 2011 no provider had satisfaction above or below average.

Figure 3.8: Fixed broadband – Satisfaction with customer service by provider



Q3: Overall how satisfied are you with the service you received from [PROVIDER] customer services on this occasion?

Base: All UK households contacting broadband provider: BT 533, Orange 251, Sky 472, TalkTalk 498, Virgin Media 646.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

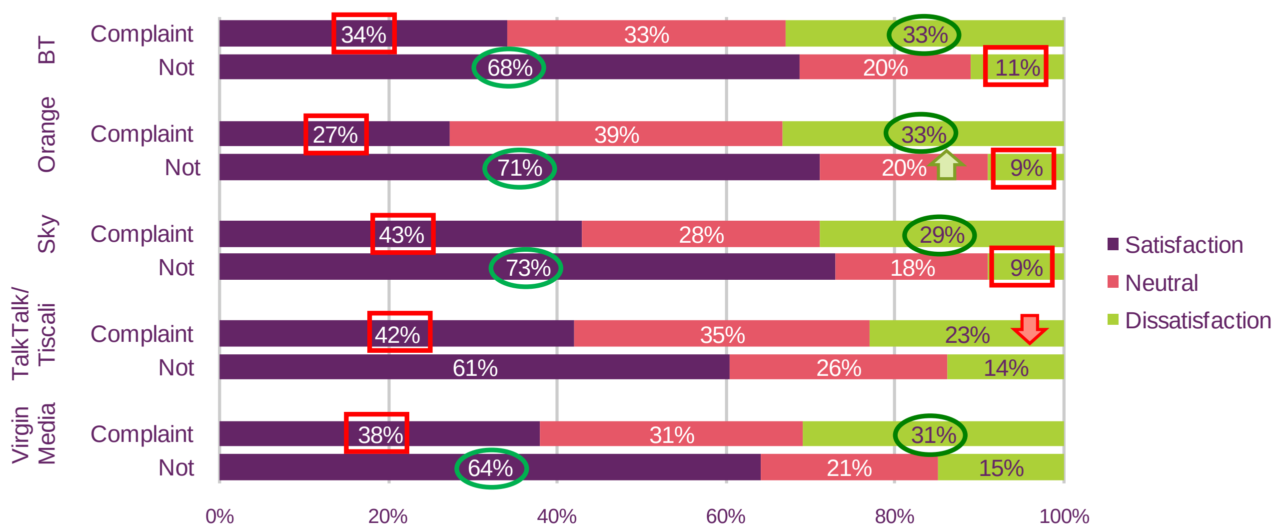
Satisfaction with customer service, by whether contact was a complaint

Figure 3.9 (below) shows the level of satisfaction with customer service from broadband providers, split by whether or not the contact was a complaint.

Since February 2011, dissatisfaction with the handling of TalkTalk complaints has reduced (from 37% to 23%). *NB: The question to determine complaints was not asked in 2009.*

For all providers, satisfaction was lower than average when the contact was a complaint.

Figure 3.9: Fixed broadband - Satisfaction with customer service by complaint or not



Q3: Overall how satisfied are you with the service you received from [PROVIDER] customer services on this occasion?

Base: All UK households contacting provider [complaint/ not complaint]: BT 175/358, Orange 85/166, Sky 164/308, TalkTalk 176/322, Virgin Media 205/441.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Satisfaction with contacting customer service

Figure 3.10 (below) shows mean satisfaction scores on various aspects of contacting customer service, based on 10 being extremely satisfied and 1 being extremely dissatisfied.

Since February 2011, TalkTalk has improved its ratings on calling back (up from 5.7) and ease of getting through (up from 5.8). Compared with 2009 there have been some improvements for all providers, as follows: ease of finding contact details (up from 6.5 BT, 5.7 Orange, 6.3 TalkTalk and 7.2 Virgin), calling back (up from 6.0 BT, 4.6 Orange, 5.9 Sky and 5.7 Virgin), getting through to the right person (up from 5.2 BT, 4.6 Orange, 6.0 Sky, 5.5 TalkTalk and 6.0 Virgin).

Virgin Media was rated above average in September 2011 on ease of finding contact details.

Figure 3.10: Fixed broadband – Satisfaction with contacting customer service

	BT	Orange	Sky	TalkTalk/ Tiscali	Virgin Media
Ease of finding provider contact details	7.0	7.2	7.0	7.2	7.6
Calling you back when they said they would	6.6	6.6	6.8	6.2 ⇧	6.6
Ease of getting through to the right person *(phone only)*	6.1	6.7	6.7	6.3 ⇧	6.6

Q4: How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied.

Base: All UK households contacting broadband provider (*by phone):* BT 533 *(465),* Orange 251 *(220)*, Sky 472 *(432)*, TalkTalk 498 *(423)*, Virgin Media 646 *(597)*.

⬭/ ▭ indicates significantly higher/ lower than overall (99% test).

⇧ / ⇩ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Satisfaction with speed of customer service

Figure 3.11 (below) shows mean satisfaction scores on various aspects to do with the speed of customer service.

TalkTalk has improved the time it takes to handle issues since February 2011 (up from 5.8 to 6.2). Ratings for this have also strengthened relative to 2009 for TalkTalk and Orange (up from 5.8 and 4.9 respectively), and speed of answering has improved for all providers since then (from 5.7 BT, 5.0 Orange, 5.8 Sky and 5.9 Virgin).

There was no difference to average on these attributes by provider in September 2011.

Figure 3.11: Fixed broadband – Satisfaction with the speed of customer service

	BT	Orange	Sky	TalkTalk/ Tiscali	Virgin Media
Speed of answering phones *(phone only)*	6.3	6.8	6.6	6.2	6.5
The time taken to handle issue	6.2	6.5	6.4	6.2 ⇧	6.4

Q4: How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied.

Base: All UK households contacting broadband provider (*by phone):* BT 533 (*465),* Orange 251 *(220)*, Sky 472 *(432)*, TalkTalk 498 *(423)*, Virgin Media 646 *(597)*.

⬭/ ▭ indicates significantly higher/ lower than overall (99% test).

⇧ / ⇩ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

GfK

Satisfaction with advice from customer service

Figure 3.12 (below) shows mean satisfaction scores for the standard of advice from customer service.

Compared with February 2011, Orange's standard of advice has declined in terms of usefulness (down from 7.3) and satisfactory issue resolution (down from 7.4). TalkTalk has improved on issue resolution (up from 5.9).

Orange's standard of advice remains better than in 2009. Sky and TalkTalk have also seen improvements over that time in the following measures: easy to understand advice (up from 5.7 Orange, 6.7 Sky), useful advice (up from 5.5 Orange, 6.0 TalkTalk), issue resolution (up from 5.4 Orange, 6.0 TalkTalk).

No provider was significantly different to the average in terms of standard of advice in September 2011.

Figure 3.12: Fixed broadband – Satisfaction with the standard of advice from customer service

	BT	Orange	Sky	TalkTalk/ Tiscali	Virgin Media
Advice/information was easy to understand	6.7	7.0	7.1	6.5	6.8
Advice/information was useful	6.5	6.7 ⇩	6.8	6.4	6.5
Getting the issue resolved to your satisfaction	6.6	6.5 ⇩	6.6	6.4 ⇧	6.5

Q4: How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied.

Base: All UK households contacting broadband provider: BT 533, Orange 251, Sky 472, TalkTalk 498, Virgin Media 646.

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

⇧ / ⇩ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Satisfaction with customer service adviser

Figure 3.13 (below) shows mean satisfaction with the customer service adviser.

Since February 2011, TalkTalk advisers have improved on understanding the problem (up from 6.2), keeping you informed (up from 6.2), doing what they say (up from 6.3) and logging details (up from 5.8). Virgin Media has improved in terms of taking the issue seriously (up from 6.9) and logging details (up from 6.3). Over the same period, Orange's performance declined on keeping the customer informed (down from 7.5).

Compared with 2009, all providers have improved some element of their performance, as follows: courtesy (up from 6.7 Orange, 7.3 Sky, 7.1 TalkTalk, 7.2 Virgin), understanding the issue (up from 6.3 BT, 5.6 Orange, 6.7 Sky, 6.1 TalkTalk, 6.6 Virgin), taking issue seriously (up from 6.9 BT, 6.2 Orange, 7.0 Sky, 6.6 TalkTalk, 6.9 Virgin), keeping customer informed (up from 6.5 BT, 5.3 Orange, 6.6 Sky, 6.2 TalkTalk, 6.5 Virgin), following through (up from 6.1 BT, 5.7 Orange, 6.7 Sky, 6.4 TalkTalk, 6.7 Virgin), logging details (up from 5.7 BT, 5.2 Orange, 6.3 Sky, 5.6 TalkTalk, 6.1 Virgin).

In September 2011 no providers were significantly above or below average in these areas.

Figure 3.13: Fixed broadband – Satisfaction with the adviser of customer service

	BT	Orange	Sky	TalkTalk/ Tiscali	Virgin Media
Courtesy and politeness of advisers	7.6	7.8	7.9	7.5	7.7
Adviser ability to understand the issue and identify the problem	6.7	7.0	7.1	6.6	6.9
Adviser took my questions/issue seriously	7.3	7.4	7.5	7.1	7.4
Keeping you informed throughout the process	6.9	6.9	7.0	6.7	6.9
Adviser doing what they say they would do	7.0	7.0	7.1	6.9	7.2
Logging of query details to avoid having to repeat yourself	6.5	6.6	6.7	6.4	6.7

Q4: How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied.

Base: All UK households contacting broadband provider: BT 533, Orange 251, Sky 472, TalkTalk 498, Virgin Media 646.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Satisfaction with other aspects of customer service

Figure 3.14 (below) shows mean satisfaction scores for more general customer service attributes.

Since February 2011, TalkTalk has improved its ratings on both compensation and willingness to resolve the issue (up from 4.4 and 6.5 respectively). Ratings were also up versus 2009 for providers as follows: willingness (up from 5.9 Orange. 6.8 Sky, 6.4 TalkTalk and 6.7 Virgin), offering compensation (up from 4.2 BT, 3.4 Orange, 4.9 Sky, 4.1 TalkTalk and 4.8 Virgin).

No providers were rated significantly above or below average on these customer service aspects in September 2011.

Figure 3.14: Fixed broadband – Satisfaction with other aspects of customer service

	BT	Orange	Sky	TalkTalk/ Tiscali	Virgin Media
Offering compensation or a goodwill payment	4.7	4.9	5.6	5.2 ⇧	5.5
Willingness to help resolve your issue	7.1	7.1	7.3	6.9 ⇧	7.2

Q4: How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied.

Base: All UK households contacting broadband provider: BT 533, Orange 251, Sky 472, TalkTalk 498, Virgin Media 646.

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

⇧ / ⇩ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

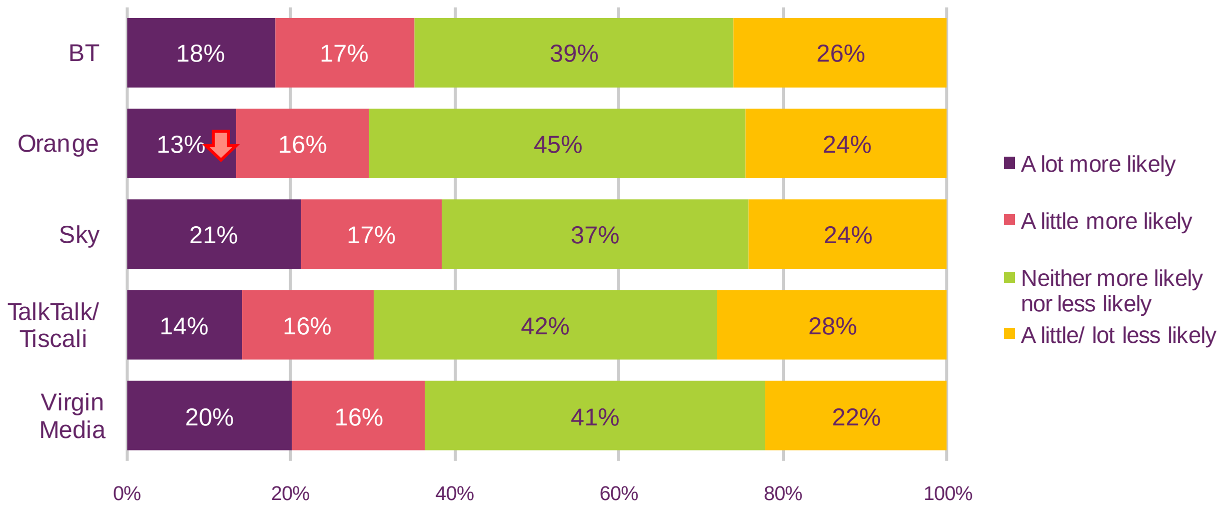
Future use of provider given customer service experience

Figure 3.15 (below) shows the likelihood of using each fixed broadband provider in the future, in light of the customer service experience during the most recent contact.

Since February 2011, Orange loyalty has declined (‘a lot more likely to use’ down from 26% to 13%), although remains stronger than in 2009 (‘less likely to use’ down from 42% to 24%).

In September 2011 no provider had loyalty above or below average for the market.

Figure 3.15: Fixed broadband – Future use of provider given customer service experience



Q7: 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 broadband provider: BT 533, Orange 251, Sky 472, TalkTalk 498, Virgin Media 646.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Mobile phone sector

This section looks specifically at the mobile phone sector, in terms of service providers contacted, issue type, issue resolution, number of contacts, satisfaction and impact on future use.

Executive Summary

- The main reason for contacting mobile providers is to change package, and this general type of enquiry is usually well handled. The smaller proportion of faults enquiries, dominated by poor reception, is less well resolved (O2 is better), and tends to require more contacts.

- Three remains more likely to have been contacted by its customers in the last three months, and has higher than average proportions of faults issues and complaints – mostly driven by reception issues. Three and Virgin Mobile customers also typically need a greater number of contacts to resolve issues. Both overall satisfaction and satisfaction with customer service are lower than average for Three, while dissatisfaction with Virgin customer service has increased since 2009. Three and Virgin are also rated lower than average on a number of aspects of customer service.

- O2 advisers give clearer and more useful advice and are better at understanding the problem and offering compensation. Adviser ratings have generally improved for mobile providers since 2009, with the exception of Virgin Mobile and, to a lesser degree, Three.

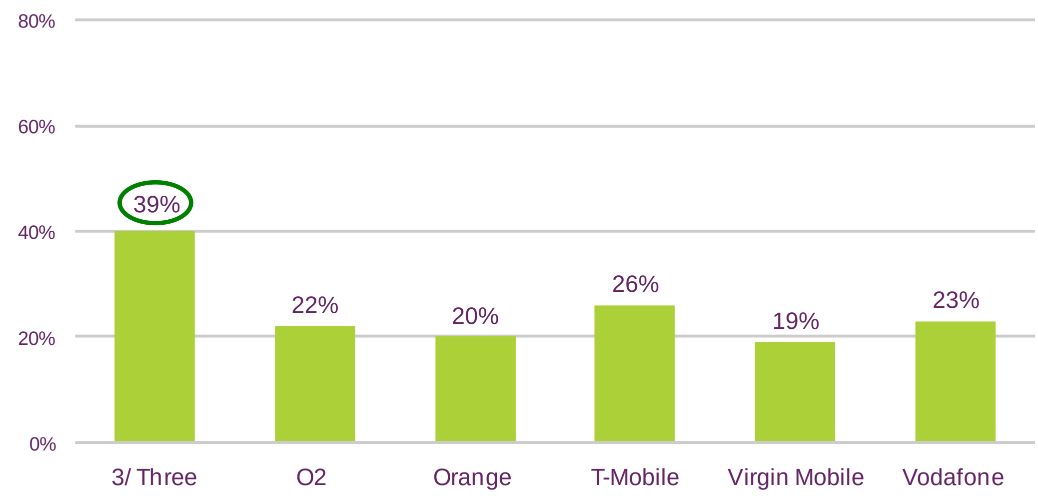
- O2 customers are more likely to stay loyal due to the customer service they have received, while Virgin Mobile and Three customers are less likely to remain with their provider.

Recent contact with provider

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

There were no changes in contact frequency relative to either February 2011 or 2009, but as seen before, the level of recent contact with Three was significantly higher than average for the sector.

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



Q6: 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 mobile phone providers: 3/ Three 156, O2 604, Orange 675, T-Mobile 285, Virgin Mobile 181, Vodafone 403.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: GfK Omnibus Survey

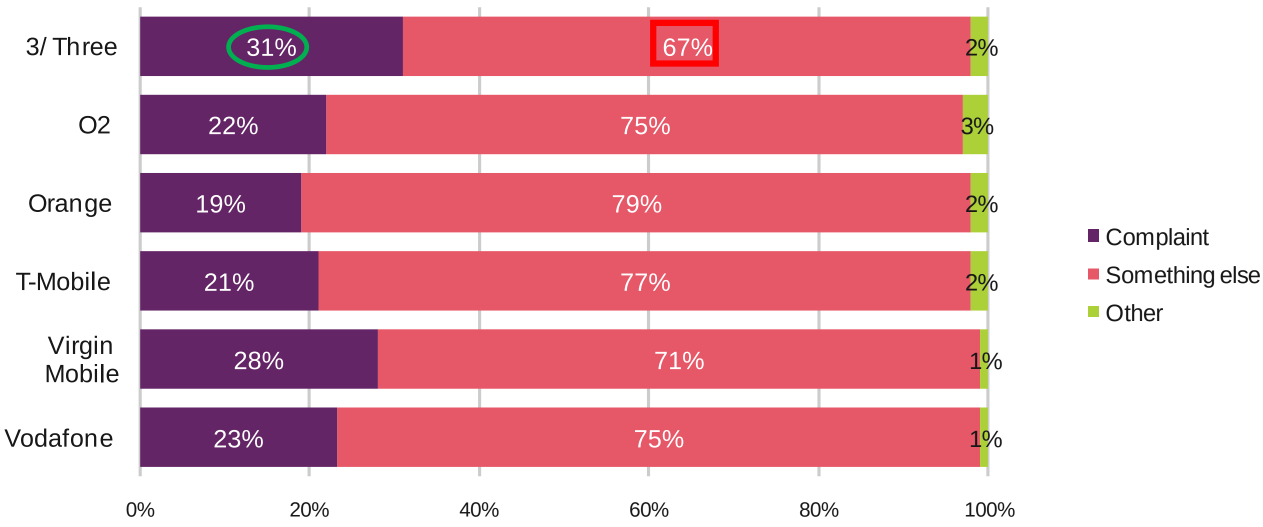
Proportion of complaints

Figure 4.2 (below) shows the proportion of recent contacts that were considered by customers to be complaints.

There was no difference in the proportion of complaints by provider compared with February 2011. *NB: This question was not asked in 2009.*

Once again, Three customers were more likely than average to say that they had contacted their provider to make a complaint.

Figure 4.2: Mobile – Whether recent contact was regarding a complaint



Q5a: And in your opinion, was the reason for this contact with [PROVIDER] a complaint, or something else?

Base: All UK households contacting mobile phone provider: 3/ Three 288, O2 632, Orange 566, T-Mobile 400, Virgin Mobile 274, Vodafone 520.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Type of call made most recently to mobile provider

Figure 4.3 (below) shows the types of calls made to mobile phone providers.

There has been no significant change in the proportion of types of contact to mobile providers since February 2011, or compared with 2009.

General queries are most prevalent in the mobile sector and Orange had an above average proportion of these in September 2011; Three continued to incur a higher than average level of fault/ repair enquiries.

Figure 4.3: Mobile – Type of call made most recently with mobile provider

Q8: 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 mobile phone provider: 3/ Three 62, O2 135, Orange 134, T-Mobile 75, Virgin Mobile 34*, Vodafone 94.

* indicates a base size lower than 50

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: GfK Omnibus Survey

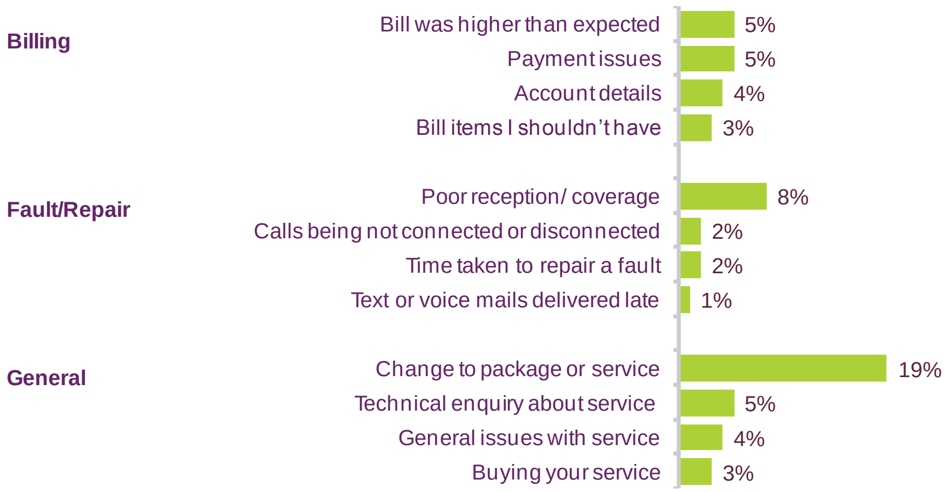
Key issues by contact type

Figure 4.4 (below) shows the most common specific reasons for recent contact with mobile phone service providers. *NB: the results are shown as a proportion of total calls, not as proportions of each type of call.*

There were no significant differences in reasons for contact compared with February 2011, although there has been an increase in the proportion of contacts regarding poor reception (up from 6% to 8%) and higher than expected bills (up from 3% to 5%) since 2009.

The main reason for recent customer contact remained changing package or service; in the less common area of faults and repairs, the main issue was poor reception.

Figure 4.4: Mobile - Top four issues per contact type



S7: Which of the following best describes what the issue with [PROVIDER] was concerning?

Base: All UK households contacting mobile phone provider: 2,680.

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

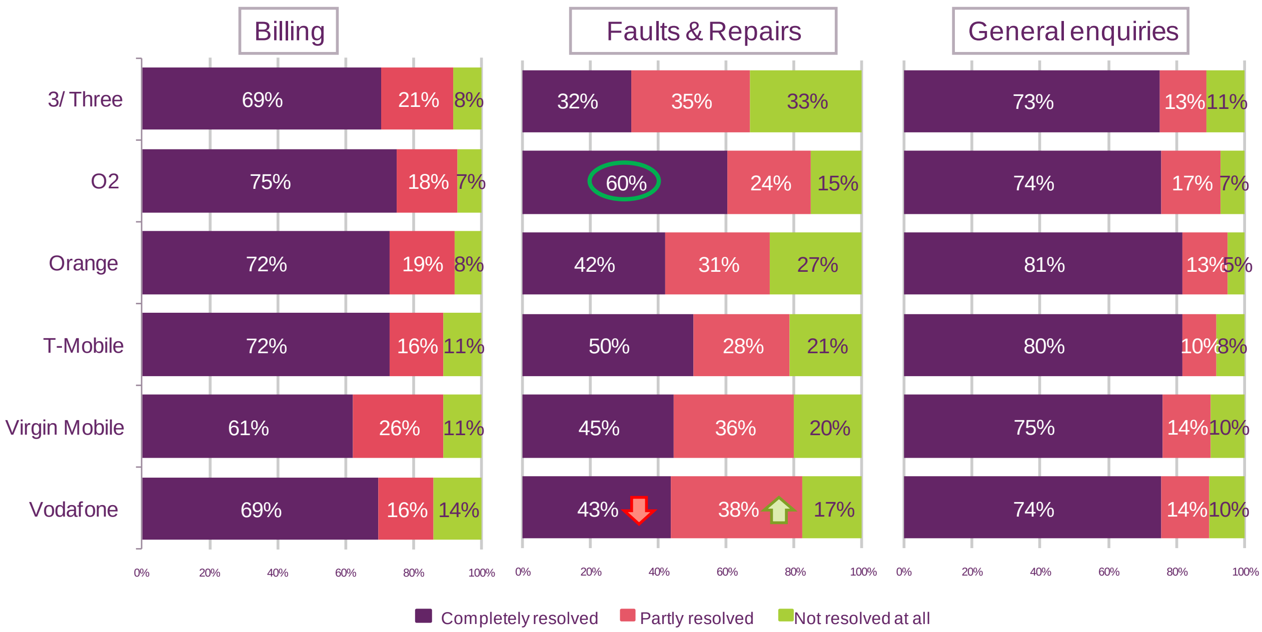
Issue resolution by mobile provider

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

Since February 2011 there has been a shift from full to partial resolution of Vodafone faults enquiries (down from 65% and up from 21% respectively). There are no significant differences versus 2009.

The only significant difference by provider in September 2011 was that O2 had better than average resolution of faults and repairs. General queries continued to have the highest claimed resolution rates, while faults/ repairs were least likely to be completely resolved.

Figure 4.5: Mobile – Whether issue is seen as 'resolved'



Q5: In your opinion, was [PROVIDER] able to successfully resolve your issue? [Billing/ Faults/ General enquiries]

Base: All UK households contacting mobile phone provider [billing/fault/general enquiries]: 3/ Three 107/57/124, O2 259/108/265, Orange 218/106/242, T-Mobile 170/68/162, Virgin Mobile 110/56/108, Vodafone 216/94/210.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

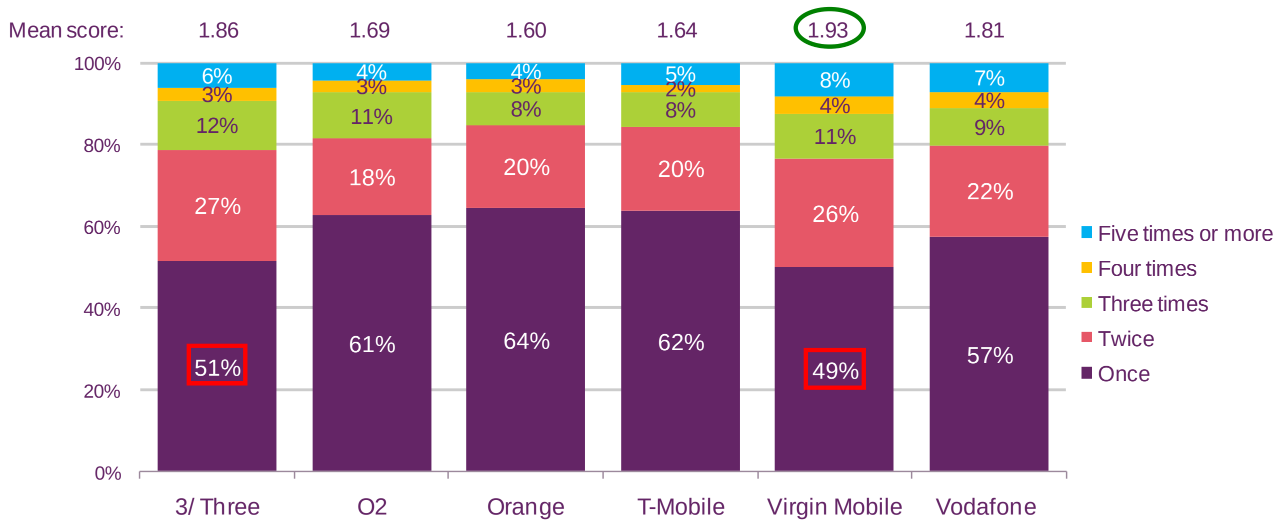
Number of contacts made with service provider

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

The contact profile is not significantly different to that seen in February 2011 and in 2009.

Mobile customers typically require fewer contacts with their provider than landline and fixed broadband customers. In September 2011, Three and Virgin Mobile customers were less likely to have their issues resolved in one contact, and Virgin customers typically required a higher than average number of contacts.

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



Q6: How many times have you been in contact with [PROVIDER] in relation to this particular issue so far?

Base: All UK households contacting mobile phone provider: 3/ Three 288, O2 632, Orange 566, T-Mobile 400, Virgin Mobile 274, Vodafone 520.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Overall satisfaction by provider

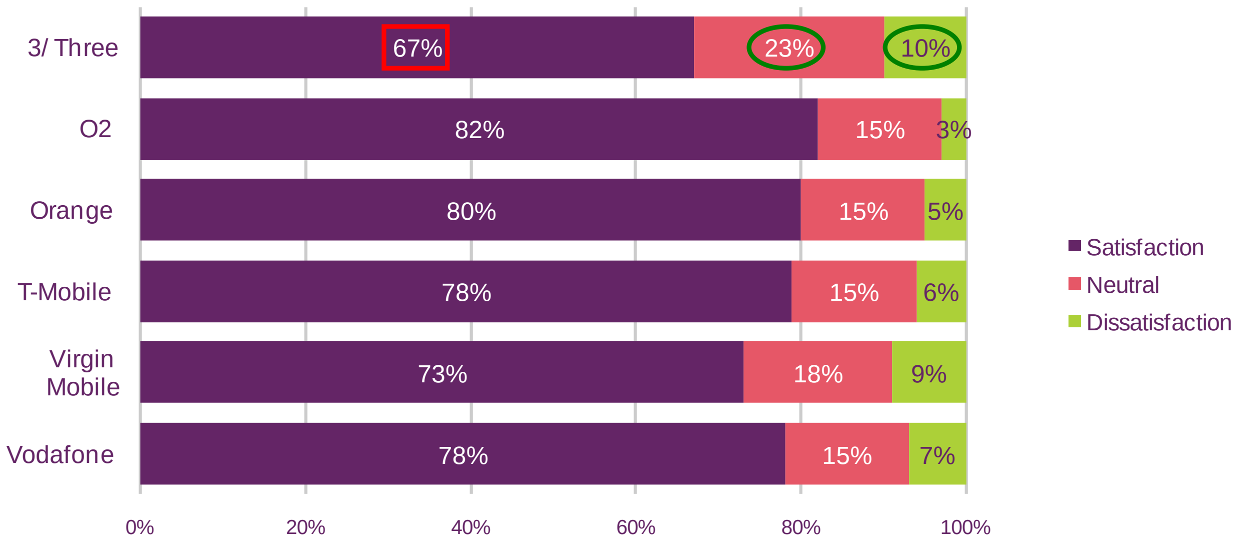
Figure 4.7 (below) shows levels of overall satisfaction with mobile phone providers.

There has been no notable change in satisfaction levels since February 2011, but satisfaction with Orange remains significantly higher than in 2009 (up from 71% to 80%).

Satisfaction was lower than average for Three in September 2011.

Satisfaction is typically higher than in the landline and fixed broadband sectors.

Figure 4.7: Mobile – Overall satisfaction by provider



Q1: Overall how satisfied are you with [PROVIDER] as your provider of [SERVICE]?

Base: All UK households contacting mobile phone provider: 3/ Three 288, O2 632, Orange 566, T-Mobile 400, Virgin Mobile 274, Vodafone 520.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

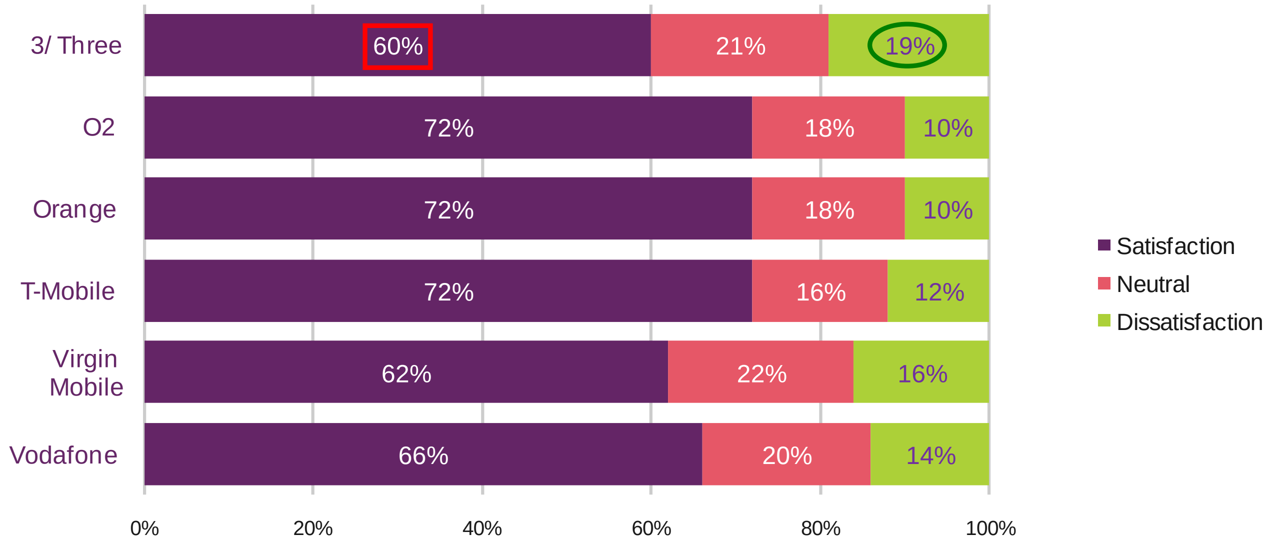
Overall satisfaction with customer service by provider

Figure 4.8 (below) shows levels of satisfaction with the customer service of mobile phone providers.

There has been no significant change in satisfaction since February 2011, but dissatisfaction with Virgin Mobile has increased since 2009 (from 6% to 16%).

In September 2011, satisfaction with Three was significantly below average.

Figure 4.8: Mobile – Satisfaction with customer service by provider



Q3: Overall how satisfied are you with the service you received from [PROVIDER] customer services on this occasion?

Base: All UK households contacting mobile phone provider: 3/ Three 288, O2 632, Orange 566, T-Mobile 400, Virgin Mobile 274, Vodafone 520.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

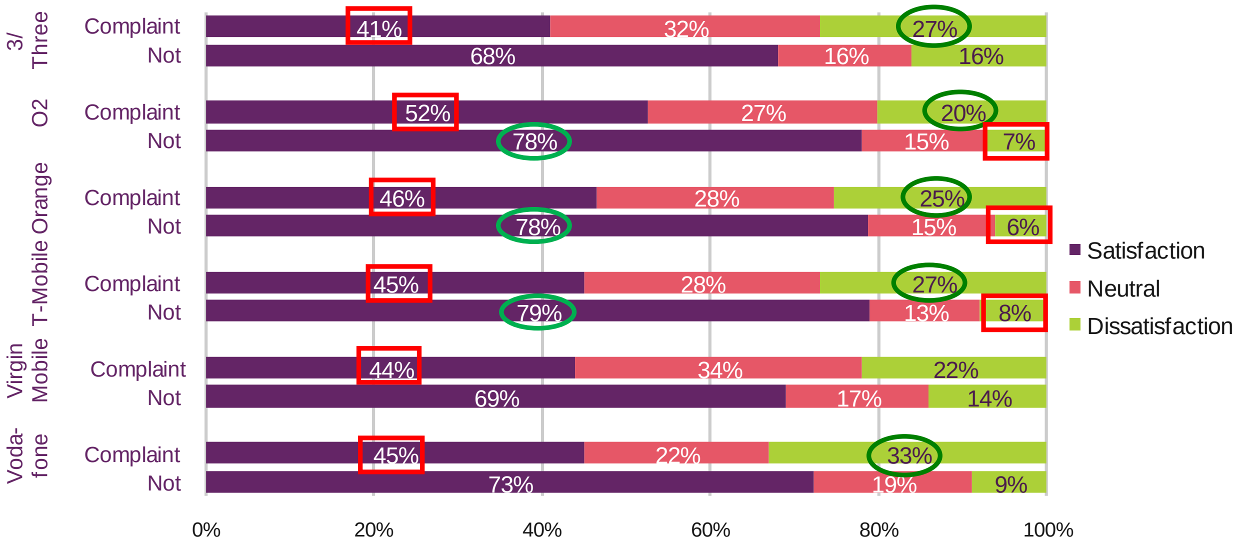
Satisfaction with customer service, by whether contact was a complaint

Figure 4.9 (below) shows the level of satisfaction with customer service from mobile phone providers split by whether or not the contact was a complaint.

There has been no significant change to these results since February 2011. *NB: The question to determine complaints was not asked in 2009.*

As with other sectors, satisfaction for all providers was lower when the contact was considered to be a complaint. Satisfaction with non-complaint contacts to O2, Orange and T-Mobile was above average.

Figure 4.9: Mobile - Satisfaction with customer service by complaint or not



Q3: Overall how satisfied are you with the service you received from [PROVIDER] customer services on this occasion?

Base All UK households contacting mobile phone provider [complaint/ not complaint]: 3/ Three 77/211, O2 147/485, Orange 135/431, T-Mobile 93/307, Virgin Mobile 81/193, Vodafone 122/398.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Satisfaction with contacting customer service

Figure 4.10 (below) shows mean satisfaction scores on various aspects of contacting customer service.

Since February 2011, ratings for O2 and Orange on call backs have strengthened (up from 7.1 and 6.7 respectively).

There has been some improvement for all mobile providers except Virgin relative to 2009, specifically: ease of finding contact details (up from 7.5 O2, 7.0 Orange and 7.1 Vodafone), calling back (up from 6.5 Three, 6.6 O2, 6.2 Orange & T-Mobile and 6.0 Vodafone), ease of getting through to the right person (up from 7.0 O2, 6.4 Orange, 6.2 T-Mobile and 6.4 Vodafone). There was, however, a decline in satisfaction rating of getting through to the right person at Virgin Mobile (down from 7.1 to 6.3).

In September 2011, Virgin Mobile was rated below average on calling back and ease of getting through.

Figure 4.10: Mobile – Satisfaction with contacting customer service

	3/ Three	O2	Orange	T-Mobile	Virgin Mobile	Voda-fone
Ease of finding provider contact details	7.9	7.9	8.0	7.8	7.7	7.6
Calling you back when they said they would	7.1	7.5 ⇧	7.2 ⇧	7.5	$\boxed{6.2}$	6.9
Ease of getting through to the right person (*phone only)*	7.0	7.6	7.4	7.3	$\boxed{6.3}$	7.3

Q4: How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied.

Base: All UK households contacting mobile phone provider *(by phone)*: 3/ Three 288 *(264)*, O2 632 *(530)*, Orange 566 *(510)*, T-Mobile 400 *(357)*, Virgin Mobile 274 *(236)*, Vodafone 520 *(423)*.

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

⇧ / ⇩ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Satisfaction with speed of customer service

Figure 4.11 (below) shows mean satisfaction scores on various aspects to do with the speed of customer service.

There was no change in speed of service relative to February 2011, but since 2009 there has been improvement for all mobile providers except Virgin, specifically: speed of answering phones (up from 6.5 Three, 6.8 O2, 6.3 Orange, 6.6 T-Mobile and 6.5 Vodafone), time taken to handle issue (up from 6.3 Three, 7.0 O2, 6.6 Orange, 6.7 T-Mobile and 6.6 Vodafone).

In September 2011, Virgin was rated below average on speed of answering phones and time taken to handle issue. Three was also rated below average on the latter aspect.

Figure 4.11: Mobile – Satisfaction with the speed of customer service

	3/ Three	O2	Orange	T-Mobile	Virgin Mobile	Voda-fone
Speed of answering phones *(phone only)*	7.4	7.5	7.3	7.5	6.4	7.2
The time taken to handle issue	6.9	7.5	7.6	7.5	6.6	7.1

Q4: How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied.

Base: All UK households contacting mobile phone provider *(by phone)*: 3/ Three 288 *(264)*, O2 632 *(530)*, Orange 566 *(510)*, T-Mobile 400 *(357)*, Virgin Mobile 274 *(236)*, Vodafone 520 *(423)*.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Satisfaction with customer service advice

Figure 4.12 (below) shows mean satisfaction scores for the standard of advice from customer service.

There have been no significant movements in this area since February 2011, but there have been some improvements for all providers except Virgin since 2009, specifically: advice being easy to understand (up from 6.4 Three, 7.4 O2, 7.1 Orange and 7.0 T-Mobile), useful advice (up from 7.2 O2, 6.9 Orange and 6.8 T-Mobile), issue resolution (up from 6.8 Orange, 6.7 T-Mobile and 6.6 Vodafone).

In September 2011, O2 was rated above average in terms of clear and useful advice, while Three and Virgin Mobile were rated below average on all three attributes.

Figure 4.12: Mobile – Satisfaction with the standard of advice from customer service

	3/ Three	O2	Orange	T-Mobile	Virgin Mobile	Voda-fone
Advice/information was easy to understand	6.9	7.8	7.8	7.6	7.0	7.3
Advice/information was useful	6.8	7.7	7.6	7.4	6.9	7.1
Getting the issue resolved to your satisfaction	6.7	7.6	7.5	7.4	6.8	7.0

Q4: How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied.

Base: All UK households contacting mobile phone provider: 3/ Three 288, O2 632, Orange 566, T-Mobile 400, Virgin Mobile 274, Vodafone 520.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Satisfaction with customer service adviser

Figure 4.13 (below) shows mean satisfaction with the customer service adviser.

The only significant change since February 2011 was an improvement in logging details by O2 (up from 7.3 to 7.7). However, since 2009 there has been significant improvement for O2, Orange, T-Mobile and Vodafone on all or many of these aspects, specifically: courtesy (up from 7.7 O2, 7.5 Orange and 7.7 T-Mobile),understanding the issue (up from 7.4 O2, 7.0 Orange and 7.2 T-Mobile), taking questions seriously (up from 7.4 O2, 7.2 Orange, 7.4 T-Mobile and 7.1 Vodafone), keeping the customer informed (up from 7.1 O2, 7.0 Orange, 7.1 T-Mobile and 6.8 Vodafone), doing what they promised (up from 7.3 O2, 7.0 Orange, 7.3 T-Mobile and 7.0 Vodafone), logging details (up from 6.8 O2, 6.7 Orange & T-Mobile and 6.5 Vodafone). Three also improved on doing what they promised (up from 6.7 to 7.2).

Virgin Mobile's performance has declined somewhat since 2009, specifically in terms of understanding the issue and doing what they promised (both down from 7.6), as well as for logging query details (down from 7.3).

In September 2011, O2 was rated above average for understanding the problem and logging details, while Three and Virgin Mobile were rated below average on all attributes apart from taking the issue seriously, and courtesy (Virgin only).

Figure 4.13: Mobile – Satisfaction with the adviser of customer service

	3/ Three	O2	Orange	T-Mobile	Virgin Mobile	Voda-fone
Courtesy and politeness of advisers	7.6	8.2	8.1	8.1	7.8	7.8
Adviser ability to understand the issue and identify the problem	6.9	7.9	7.7	7.7	7.0	7.2
Adviser took my questions/issue seriously	7.4	8.0	7.9	7.9	7.4	7.5
Keeping you informed throughout the process	7.1	7.8	7.7	7.6	7.0	7.3
Adviser doing what they say they would do	7.2	7.9	7.9	7.9	7.0	7.4
Logging of query details to avoid having to repeat yourself	6.8	7.7	7.4	7.4	6.5	7.1

Q4: How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied.

Base: All UK households contacting mobile phone provider: 3/ Three 288, O2 632, Orange 566, T-Mobile 400, Virgin Mobile 274, Vodafone 520.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Satisfaction with other aspects of customer service

Figure 4.14 (below) shows mean satisfaction scores for more general customer service attributes.

Since February 2011 there has been a rise in the rating for O2 on offering compensation (up from 6.1 to 6.6). Relative to 2009, O2, Orange and T-Mobile have improved their ratings on willingness to help (up from 7.3, 7.2 and 7.2 respectively) and all providers except Virgin have strengthened on offering compensation (up from 5.2 Three, 5.6 O2 and 5.2 Orange, T-Mobile & Vodafone).

In September 2011, O2 was rated above average – and Virgin Mobile below average - on offering compensation, whilst Three was rated below average on willingness to resolve the issue.

Figure 4.14: Mobile – Satisfaction with <u>other aspects</u> of customer service

	3/ Three	O2	Orange	T-Mobile	Virgin Mobile	Voda-fone
Offering compensation or a goodwill payment	5.9	6.6	6.0	6.2	5.3	5.8
Willingness to help resolve your issue	7.1	7.9	7.8	7.8	7.3	7.3

Q4: How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied.

Base: All UK households contacting mobile phone provider: 3/ Three 288, O2 632, Orange 566, T-Mobile 400, Virgin Mobile 274, Vodafone 520.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

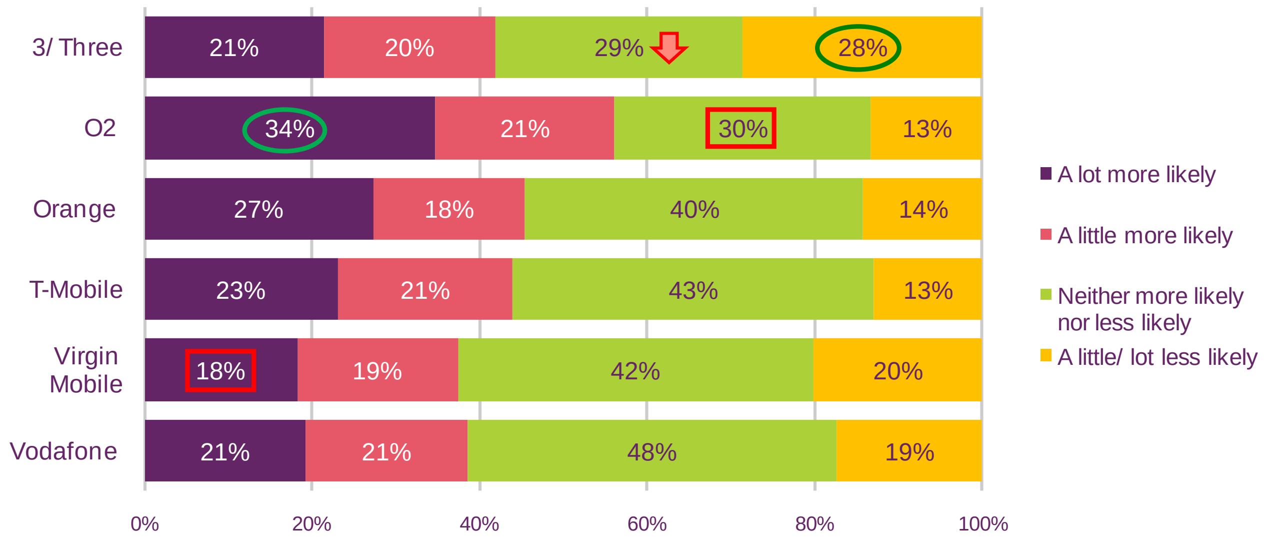
Future use of provider given customer service experience

Figure 4.15 (below) shows the likelihood of using each mobile provider in the future, in light of the customer service experience during the most recent contact.

Since February 2011 there has been a decline in the proportion of Three customers that is neutral towards this provider (‘neither more nor less likely to use again’ down from 42% to 29%). Compared with 2009, Vodafone customers are now more neutral (up from 33% to 48%), while Virgin Mobile customers are less likely to be loyal (‘a lot more likely to use again’ down from 36% to 18%).

In September 2011, O2 customers were more strongly loyal than average, while Virgin customers were less so, and Three customers were more likely not to stay with their provider.

Figure 4.15: Mobile – Future use of provider given customer service experience



Q7: 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 mobile phone provider: 3/ Three 288, O2 632, Orange 566, T-Mobile 400, Virgin Mobile 274, Vodafone 520.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Pay TV sector

This section looks specifically at the pay TV sector, in terms of service providers contacted, issue type, issue resolution, number of contacts, satisfaction and impact on future use.

Executive Summary

- The key reason for contact is changing package or service, followed by to arrange an engineer's visit or discuss the time taken for repairs; billing issues are less common in this sector. Contact frequency in the pay TV sector is unchanged, with just under a quarter of customers of both providers having contacted recently.

- Issues are mostly resolved, although not always fully. Faults and repairs issues require more contacts while general queries need fewest. Virgin Media customers are more likely to need more than one contact to resolve the issue.

- Satisfaction with Sky's customer service is above the market average. Overall satisfaction with Sky has increased since 2009, as have ratings of Sky advisers on all attributes. Virgin Media's advisers tended to perform below average, with scores ranging between 6.8 and 7.7 which compare to scores of 7.3 to 8.1 for Sky. Virgin Media were rated below average on clarity of information and willingness to resolve the issue, and dissatisfaction with customer service has increased since 2009.

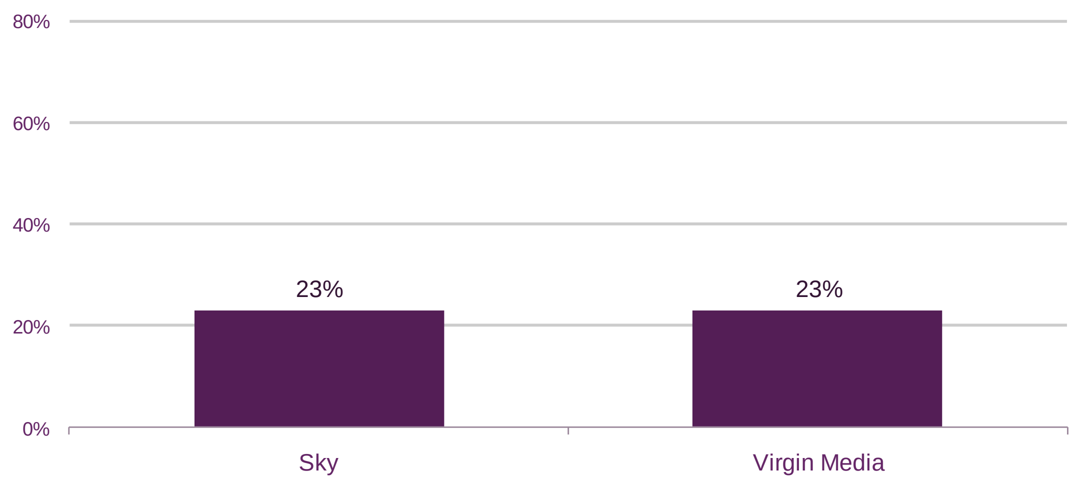
- There is no significant difference in claimed loyalty to the two providers, although – in line with reduced satisfaction - Virgin customers are less loyal to their provider than they were in 2009.

Recent contact with provider

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

There was no significant change in levels of contact since February 2011, or compared with 2009.

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



Q6: 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 pay TV providers: Sky 1,148, Virgin Media 436.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: GfK Omnibus Survey

Proportion of complaints

Figure 5.2 (below) shows the proportion of recent contacts that were considered by customers to be complaints.

There was no change in these levels since February 2011. *NB: This question was not asked in 2009.*

Neither provider was significantly different to the average in terms of the proportion of complaints.

Figure 5.2: Pay TV – Whether recent contact was regarding a complaint

Q5a: And in your opinion, was the reason for this contact with [PROVIDER] a complaint, or something else?

Base: All UK households contacting pay TV provider: 1,121, Virgin Media 608.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

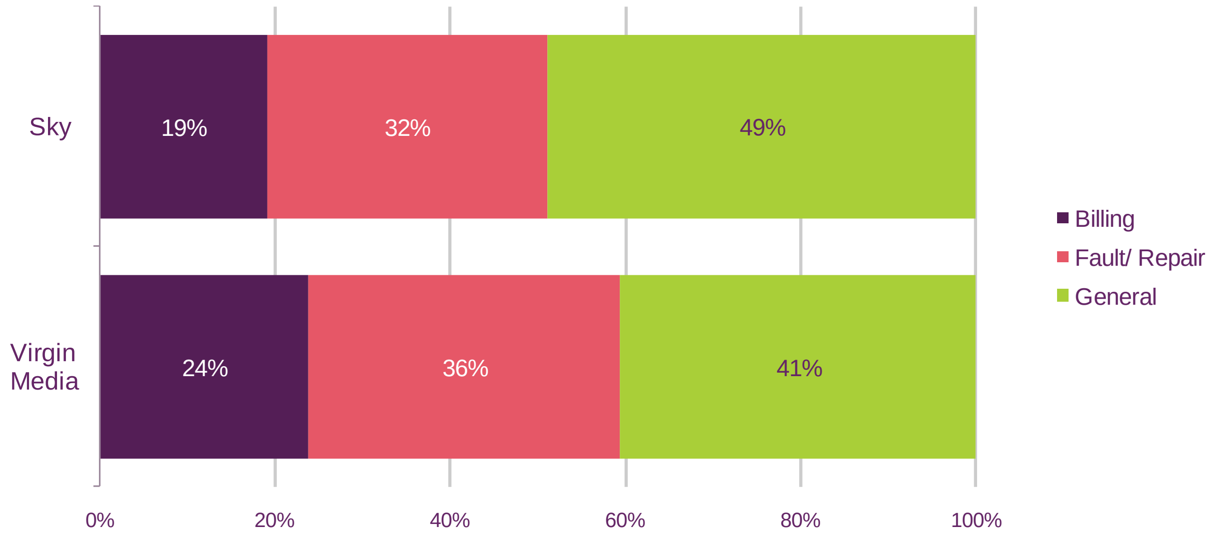
Type of call made most recently to service provider

Figure 5.3 (below) shows the types of calls made to pay TV providers.

There was no significant difference in call type by provider compared with February 2011 or with 2009 findings.

Billing enquiries are less common than faults or general enquiries in the pay TV sector, but neither provider was significantly different to the sector average.

Figure 5.3: Pay TV – Type of call made most recently with pay TV provider



Q8: 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 pay TV provider: Sky 268, Virgin Media 101.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: GfK Omnibus Survey

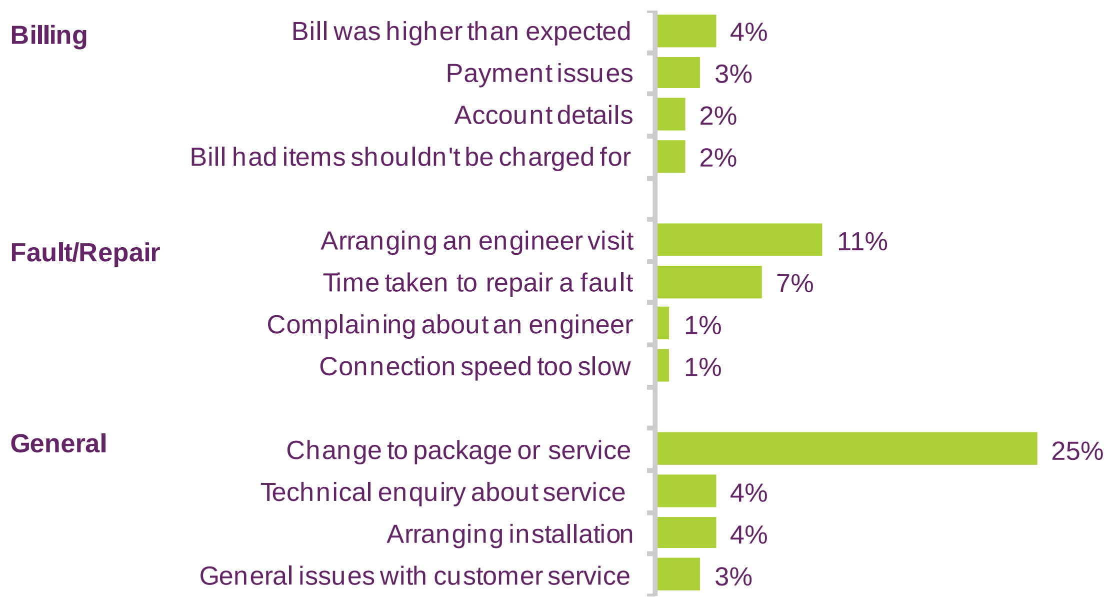
Key issues by contact type

Figure 5.4 (below) shows the most common specific reasons for recent contact with pay TV service providers. *NB: the results are shown as a proportion of total calls, not as proportions of each type of call.*

There were no changes relative to February 2011 or 2009 in terms of contact issues in the pay TV sector.

By far the main reason for contacting pay TV providers was to change package or service. Next most typical reasons for contact were to arrange an engineer visit or to discuss the time taken to repair a fault.

Figure 5.4: Pay TV - Top four issues per contact type



S7: Which of the following best describes what the issue with [PROVIDER] was concerning?

Base: All UK households contacting pay TV provider: 1,729.

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

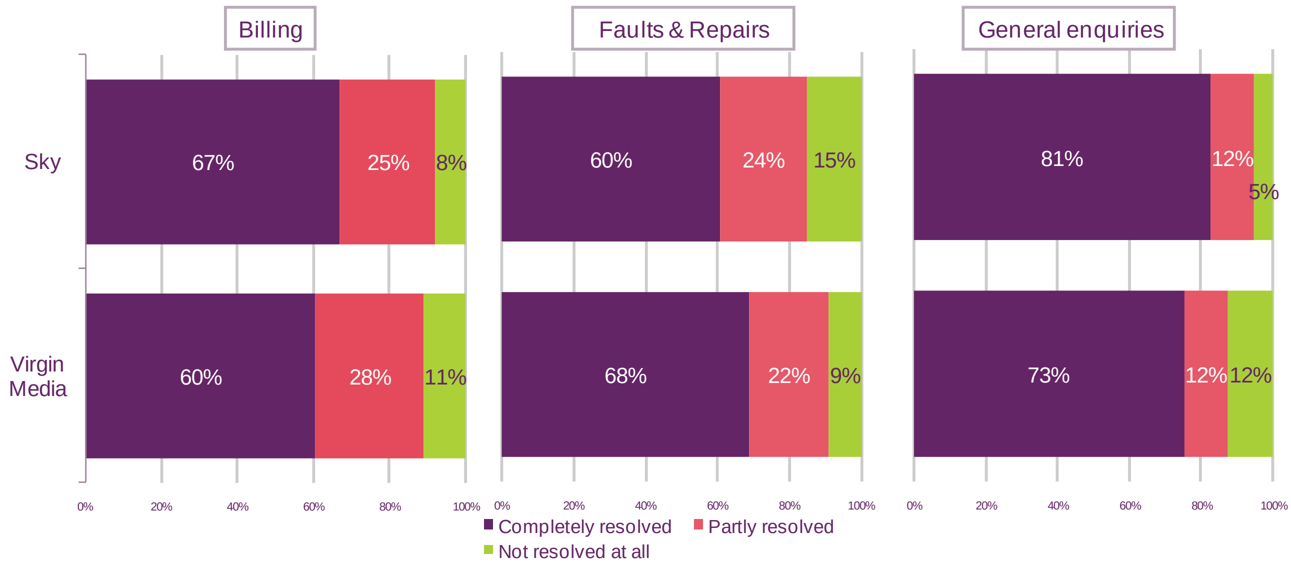
Issue resolution by service provider

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

There were no significant changes in issue resolution since February 2011 or compared with 2009.

General enquiries were typically more fully resolved, but neither provider was different from the average in terms of resolution levels by issue type.

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



Q5: In your opinion, was [PROVIDER] able to successfully resolve your issue? [Billing/Faults/General]

Base: All UK households contacting pay TV provider [billing/faults/general enquiries]: Sky 362/304/455, Virgin Media 169/232/207 .

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

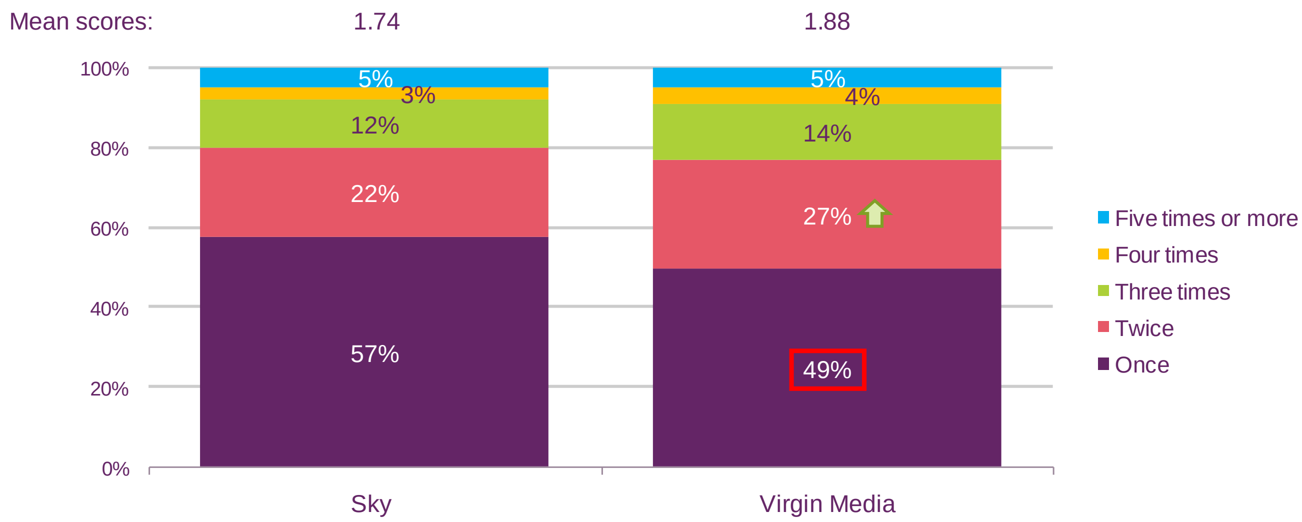
Number of contacts made with service provider

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

Compared with February 2011, there has been an increase in the proportion of Virgin Media customers that need to contact their provider twice (up from 20% to 27%). There were no significant changes since 2009.

As in the mobile phone sector, pay TV customers generally required fewer contacts with their provider compared with landline or fixed broadband customers. In September 2011, Virgin Media customers were less likely than average to resolve their issue in the first contact.

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



Q6: How many times have you been in contact with [PROVIDER] in relation to this particular issue so far?

Base: All UK households contacting pay TV provider: Sky 1,121, Virgin Media 608.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

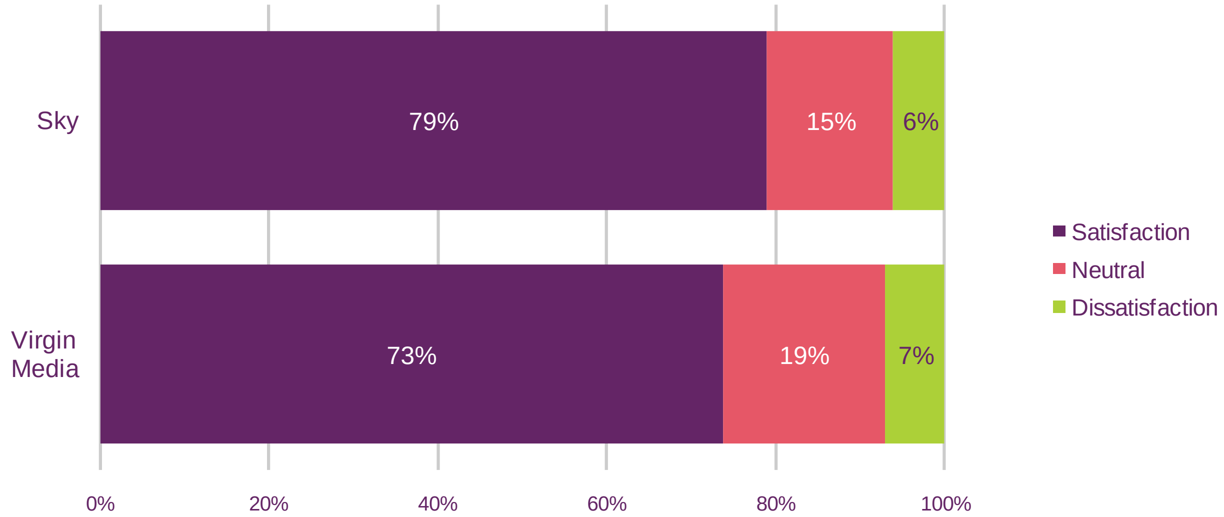
Overall satisfaction by provider

Figure 5.7 (below) shows levels of overall satisfaction with pay TV providers.

There has been no change in overall satisfaction levels since February 2011, but satisfaction with Sky was up on 2009 (from 72% to 79%).

The ratings of the two providers were not significantly different to the average in September 2011.

Figure 5.7: Pay TV – Overall satisfaction by provider



Q1: Overall how satisfied are you with [PROVIDER] as your provider of [SERVICE] on a 1 to 10 scale?

Base: All UK households contacting pay TV provider: Sky 1,121, Virgin Media 608.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

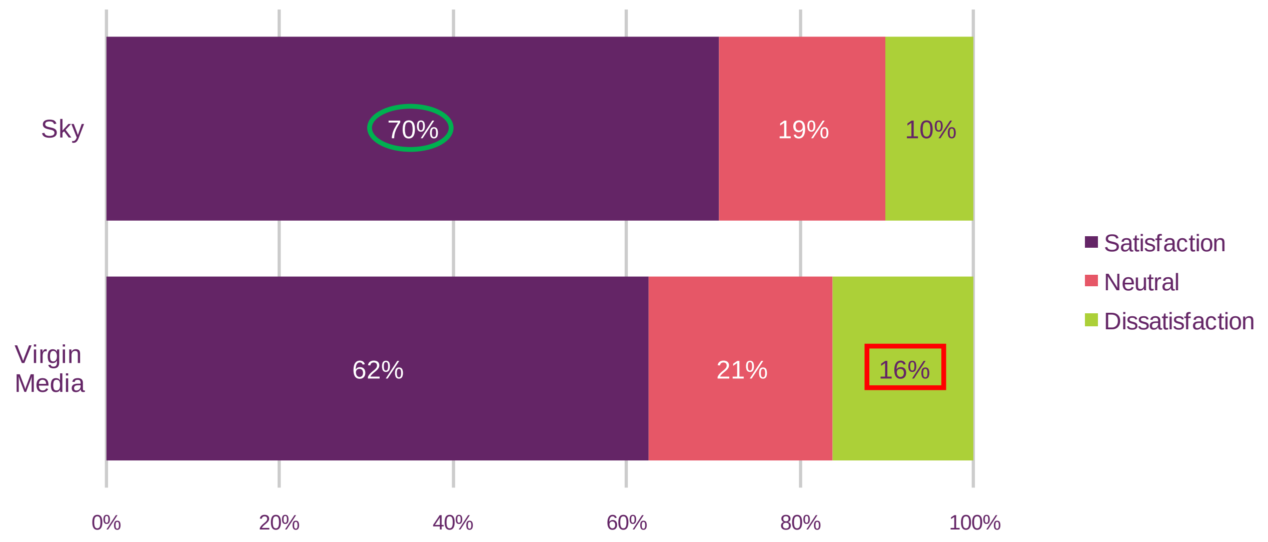
Overall satisfaction with customer service by provider

Figure 5.8 (below) shows levels of satisfaction with the customer service of pay TV providers.

There was no change since February 2011, but dissatisfaction with Virgin Media has increased since 2009 (from 10% to 16%).

In September 2011, satisfaction with Sky and dissatisfaction with Virgin Media were above average for the sector.

Figure 5.8: Pay TV – Satisfaction with customer service by provider



Q3: Overall how satisfied are you with the service you received from [PROVIDER] customer services on this occasion?

Base: All UK households contacting pay TV provider: Sky 1,121, Virgin Media 608.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

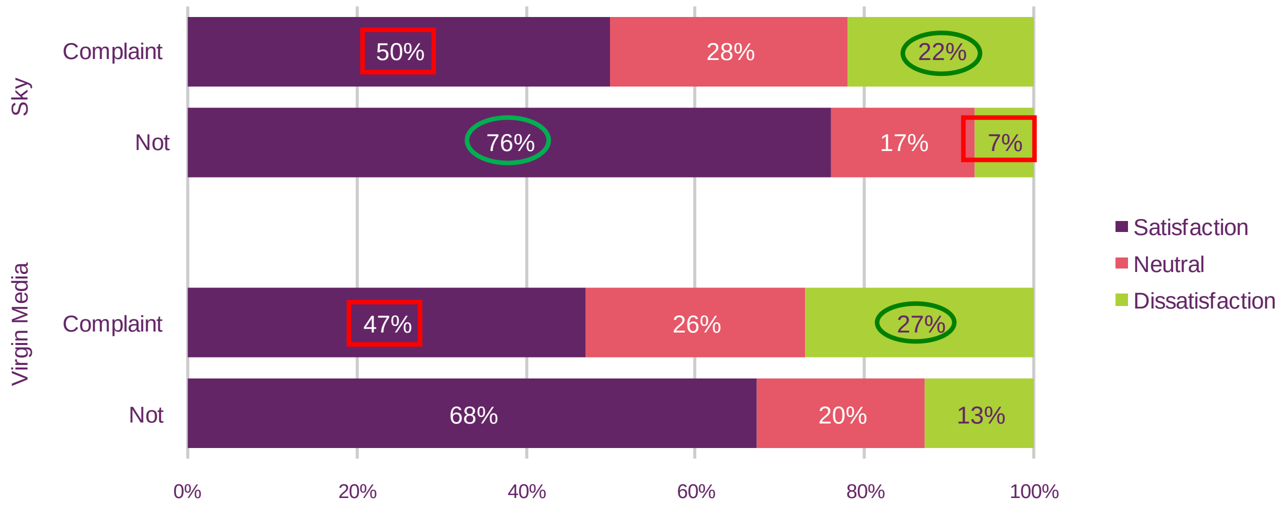
Satisfaction with customer service, by whether contact was a complaint

Figure 5.9 (below) shows the level of satisfaction with customer service from pay TV providers, split by whether or not the contact was a complaint.

There was no notable change in these levels versus February 2011. *NB: The question to determine complaints was not asked in 2009.*

As seen in other sectors, satisfaction was lower when the contact was considered to be a complaint. Satisfaction with Sky's handling of non-complaints was above average.

Figure 5.9: Pay TV - Satisfaction with customer service by complaint or not



Q3: Overall how satisfied are you with the service you received from [PROVIDER] customer services on this occasion?

Base: All UK households contacting pay TV provider [complaint/ not complaint]: Sky 250/871, Virgin Media 163/445.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Satisfaction with contacting customer service

Figure 5.10 (below) shows mean satisfaction scores on various aspects of contacting customer service.

There have been no significant movements since February 2011, but compared with 2009 Sky ratings have improved on ease of finding contact details (up from 6.6), calling back (from 5.9) and ease of getting through to the right person (from 6.0). Virgin Media also improved its rating on calling back (from 6.1).

As seen before, Virgin Media was rated above average in terms of ease of finding contact details.

Figure 5.10: Pay TV – Satisfaction with contacting customer service

	Sky	Virgin Media
Ease of finding provider contact details	7.4	7.8
Calling you back when they said they would	7.1	6.6
Ease of getting through to the right person *(phone only)*	7.1	6.8

Q4: How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied.

Base: All UK households contacting pay TV provider *(by phone)*: Sky 1,121 *(1,008)*, Virgin Media 608 *(569)*.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Satisfaction with speed of customer service

Figure 5.11 (below) shows mean satisfaction scores on various aspects to do with the speed of customer service.

There has been no significant change since February 2011, but Sky has improved since 2009 on speed of answering phones (from 5.9 to 6.9) and time taken to handle issue (from 6.4 to 7.2).

Neither provider was significantly different to the average in these areas in September 2011.

Figure 5.11: Pay TV – Satisfaction with the speed of customer service

	Sky	Virgin Media
Speed of answering phones *(phone only)*	6.9	6.6
The time taken to handle issue	7.2	6.8

Q4: How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied.

Base: All UK households contacting pay TV provider *(by phone)*: Sky 1,121 *(1,008)*, Virgin Media 608 *(569)*.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Satisfaction with customer service advice

Figure 5.12 (below) shows mean satisfaction scores for the standard of advice from customer service.

There have been no significant changes since February 2011, but since 2009 Sky has improved all its ratings in this area, specifically: advice being easy to understand (from 6.9) and useful (from 6.7) and satisfactory issue resolution (from 6.7).

In September 2011, Virgin Media was rated below average on giving advice that was easy to understand and useful.

Figure 5.12: Pay TV - Satisfaction with the standard of advice from customer service

	Sky	Virgin Media
Advice/ information was easy to understand	7.6	7.1
Advice/ information was useful	7.4	6.9
Getting the issue resolved to your satisfaction	7.4	7.0

Q4: How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied.

Base: All UK households contacting pay TV provider: Sky 1,121, Virgin Media 608.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Satisfaction with customer service adviser

Figure 5.13 (below) shows mean satisfaction with the customer service adviser.

Again there are no notable changes since February 2011, but Sky's adviser ratings have improved across the board since 2009, specifically: courtesy (from 7.4), understanding the issue (from 6.9), taking the issue seriously (from 7.1), keeping the customer informed (from 6.8), doing what they said (from 7.0) and logging details (from 6.5).

Virgin Media advisers were rated significantly below average for the pay TV sector on all aspects of their customer service in September 2011.

Figure 5.13: Pay TV – Satisfaction with the adviser of customer service

	Sky	Virgin Media
Courtesy and politeness of advisers	8.1	7.7
Adviser ability to understand the issue and identify the problem	7.7	7.0
Adviser took my questions/issue seriously	7.9	7.5
Keeping you informed throughout the process	7.6	7.1
Adviser doing what they say they would do	7.8	7.3
Logging of query details to avoid having to repeat yourself	7.3	6.8

Q4: How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied.

Base: All UK households contacting pay TV provider: Sky 1,121, Virgin Media 608.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Satisfaction with other aspects of customer service

Figure 5.14 (below) shows mean satisfaction scores for more general customer service attributes.

There have been no significant changes in ratings in these areas since February 2011, but compared with 2009, Sky has improved its ratings on offering compensation (up from 5.0) and willingness to help (from 6.9), and Virgin Media improved on offering compensation (up from 5.2).

In September 2011, Virgin Media was rated below average in terms of willingness to help resolve the issue.

Figure 5.14: Pay TV – Satisfaction with other aspects of customer service

	Sky	Virgin Media
Offering compensation or a goodwill payment	6.2	5.6
Willingness to help resolve your issue	7.8	$\boxed{7.3}$

Q4: How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied.

Base: All UK households contacting pay TV provider: Sky 1,121, Virgin Media 608.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

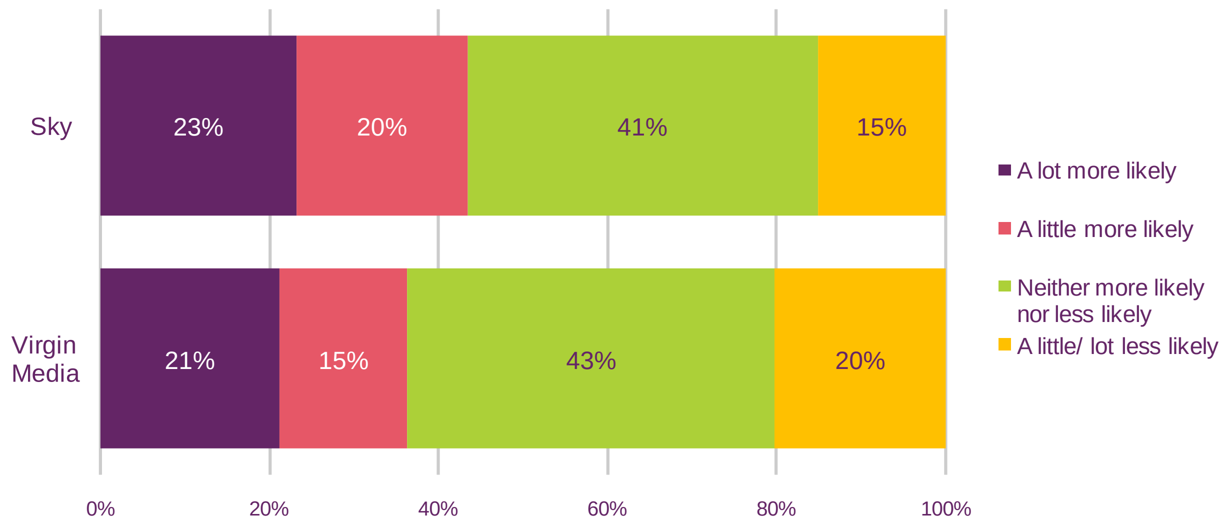
Future use of provider given customer service experience

Figure 5.15 (below) shows the likelihood of using each mobile provider in the future, in light of the customer service experience during the most recent contact.

While there is no change in loyalty since February 2011, there has been a decline since 2009 in the proportion of Virgin Media customers saying they were ‘a little more likely’ to use this provider in the future (from 21% to 15%) and a corresponding increase in the proportion of customers less likely to use this provider again (from 14% to 20%).

However, neither provider was rated significantly different to the sector average in September 2011 in terms of claimed likelihood to use in the future.

Figure 5.15: Pay TV – Future use of provider given customer service experience



Q7: 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 pay TV provider: : Sky 1,121, Virgin Media 608.

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

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Appendix 1: Online 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 dongle or 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 (e.g. 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. Calling back when they said they would
C. Ease of getting through to the right person (PHONE)

Speed…
D. Speed of answering phones (PHONE)
E. The time taken to handle your issue

Standard of advice…
F. Advice/information was easy to understand
G. Advice/information was useful
H. Getting the issue resolved to your satisfaction

SCREEN 2:
Adviser…
I. Courtesy and politeness of advisers
J. Adviser ability to understand the issue and identify the problem
K. Adviser took my question/issue seriously
L. Keeping you informed throughout the process
M. Adviser doing what they said they would do
N. Logging of query details to avoid having to repeat yourself

General…
O. Offering compensation or a goodwill payment
P. Willingness to help resolve your issue

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

Q5a And in your opinion, was the reason for this contact with [PROVIDER] a complaint, or something else?

1. Complaint
2. Something else
3. Don't know

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 If you were provided with customer service ratings for different companies, 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 ELGIIBLE 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 questionnaire

3000 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 one 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. This may be different to your line rental provider, and does not include mobile calls.

1. BT
2. Virgin Media
3. TalkTalk/ AOL
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 personal 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. TalkTalk/ AOL/ Tiscali
5. Virgin Media
6. Don't have broadband
7. 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 FOR ALL COMPANIES CODED AT Q.1/2/3/4 (Q.1 CODES 01-04, Q.2 CODES 01-06, Q.3 CODES 01-05, 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 OR Q.3 CODED 05 OR Q.4 CODED 02
ASK FOR TALKTALK/AOL/TISCALI 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

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
TALKTALK IF USE TALKTALK AT Q.1 AND Q.3 AND CODE 01 FOR TALKTALK 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 FOR ALL COMPANIES CODED AT Q.1/2/3/4 (Q.1 CODES 01-04, Q.2 CODES 01-06, Q.3 CODES 01-05, 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 05 OR Q.4 CODED 02 AND Q.6 CODE 01
ASK FOR TALKTALK/AOL/TISCALI 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

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

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 online survey data

	Total Base	Oct 2009	Feb 2011	Sept 2011
Gender	Male	48%	38%	39%
	Female	52%	62%	61%
Age	18-24	15%	12%	14%
	25-34	26%	23%	27%
	35-44	22%	23%	22%
	45-54	17%	18%	17%
	55-64	11%	16%	14%
	65+	9%	9%	6%
Working Status	Full time	52%	49%	50%
	Part time	15%	17%	16%
	Other	33%	34%	34%
Region (GOR)	East Midlands	8%	7%	8%
	Eastern	5%	6%	6%
	London	13%	11%	13%
	North East	6%	5%	5%
	North West	11%	12%	12%
	Scotland	11%	8%	8%
	South East	17%	18%	16%
	South West	7%	9%	9%
	Ulster / Northern Ireland	2%	1%	2%
	Wales	4%	5%	4%
	West Midlands	8%	9%	8%
	Yorks & Humber	8%	9%	9%