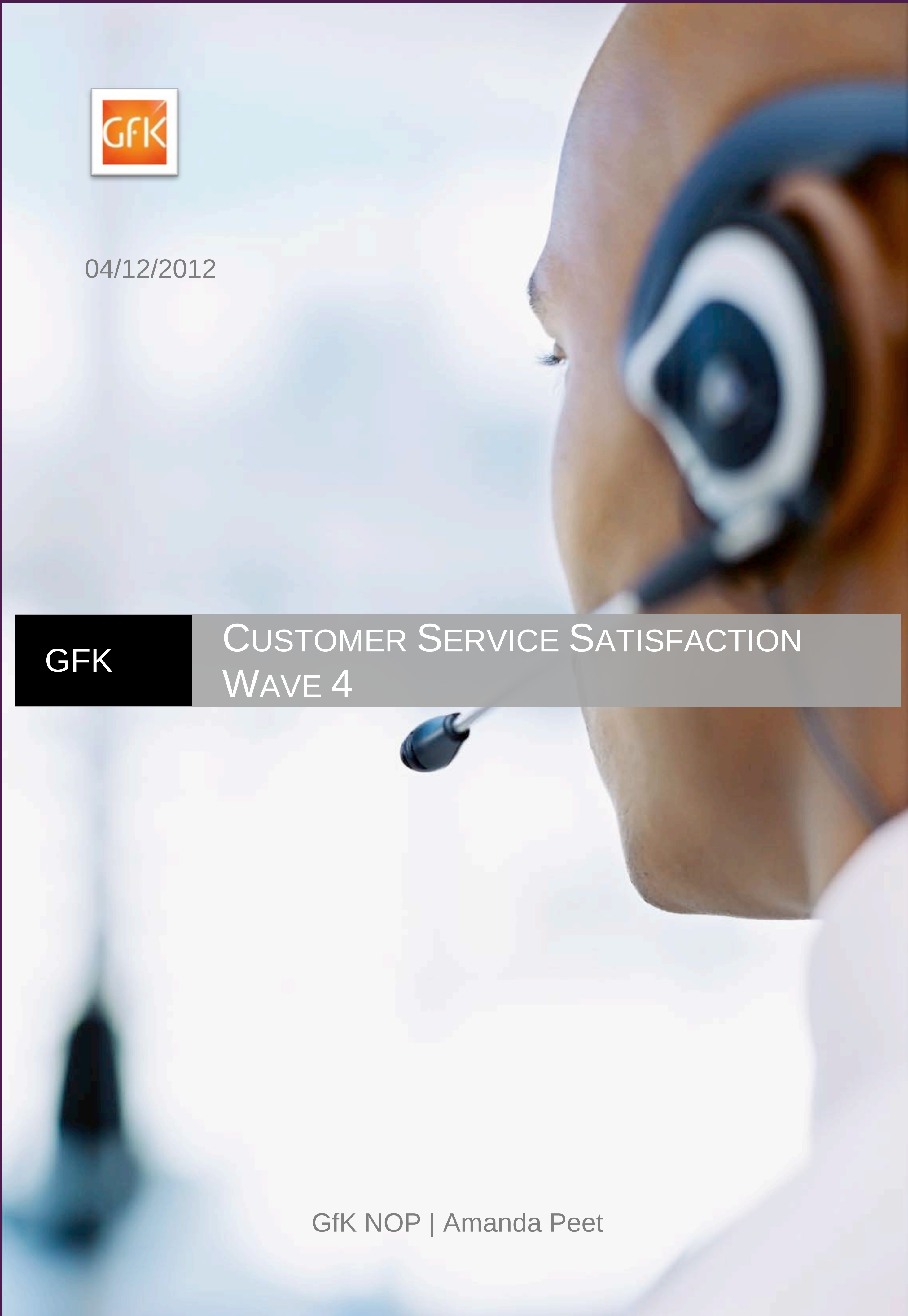

04/12/2012

GFK

CUSTOMER SERVICE SATISFACTION WAVE 4

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, wireless communications services and postal services.

- The following report shows the results of the fourth wave of a study on the quality of customer services offered to customers of broadband, mobile, fixed line and Pay TV providers. 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 2012. Reports of previous waves of the research are available from Ofcom's website [(1)]

- Ofcom's primary duty under section 3(1) of the Communications Act 2003 (the "Act") in carrying out its functions is to further the interests of UK citizens and consumers. The Act requires Ofcom to make arrangements to find out about the experiences of consumers using electronic communications services and associated facilities and the way they are provided (section 14), and Ofcom does this by carrying out research into these services. Subject to certain exceptions, Ofcom has a duty to publish the results of its research and to take account of it in carrying out its functions (section 15). Ofcom may also arrange for the publication of such information and advice about matters in relation to which it has functions as it appears to be appropriate (section 26)

Findings

Overall satisfaction with customer service:

- UK providers of landline, broadband, mobile and Pay TV services provide a customer service experience which results in 62%-69% of customers being satisfied when they contact their provider, and levels of dissatisfaction are low in comparison (11%-17%). Impartial ratings of providers are still considered useful by two thirds of customers, and particularly by dissatisfied customers – although such information has become less important to customers in the mobile sector in the last year.

- Despite year-on-year improvement, satisfaction with customer service remains lowest in the broadband sector (62%). It is highest in the Pay TV sector (69%); satisfaction levels in the landline and mobile markets are 64% and 67% respectively. Both complaints and dissatisfaction with customer service have increased in the mobile sector in the last few years.

[(1)] http://stakeholders.ofcom.org.uk/consultations/topcomm/qos-report/]
http://stakeholders.ofcom.org.uk/market-data-research/telecoms-research/quality-of-customer-service/
http://stakeholders.ofcom.org.uk/binaries/research/telecoms-research/customer-service.pdf]

- Key provider differences by sector this wave include:

  - Landline: Lower than average proportion of customers contacting BT; Sky has generally higher customer service ratings than other providers; satisfaction with Virgin's customer service has increased year-on-year.
  - Broadband: TalkTalk and Virgin Media receive more customer contacts; Sky's advisers are rated above average on understanding the problem, keeping the customer informed and logging details.
  - Mobile: Above average satisfaction and adviser ratings for O2.
  - Pay TV: Virgin Media customers have lower claimed loyalty than average.

- Since first measured in 2009, ratings of various aspects of providers' customer service have generally improved.

Number of enquiries and/ or complaints:

- There are relatively fewer customer contacts with service providers in the landline sector than other sectors, mostly because BT customers appear to have fewer contacts with their supplier. There has been a significant year-on-year decrease in the level of contacts in all sectors except mobile.

- The most notable reduction was in the fixed broadband market, where the level of contacts fell by 9 percentage points over the last 12 months; this was due to a drop in the proportion of customers contacting BT (-10%), Sky (-11%) and Orange (-22%).

- Around a quarter of customer contacts are complaints (21%-29% across sectors), although - as noted earlier - the Pay TV sector had a lower proportion of complaints than other sectors. There is some variation in the level of complaints between providers within some sectors: in Virgin Media has a higher than average level of complaints about landline service; similarly Virgin Media has a higher than average level of complaints about its Pay TV service. Complaint levels about mobile and broadband service are broadly comparable across providers.

Issue resolution:

- For all service types, between 79% and 92% of issues are seen as at least partially resolved - although in many cases this requires more than one contact, especially for faults. Faults in the mobile and broadband sectors - typically poor reception and slow connection speed, respectively - are least well resolved (around 20% unresolved).

- In the broadband sector there has been improvement since last year in the resolution of billing contacts, although the proportion of unresolved complaints and queries regarding faults has increased in the same period.

Objectives and Methodology

Research Aim

To quantify levels of satisfaction with customer service experience among the main 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, 2 and 3, 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 fourth wave of research were broadly comparable to those seen in previous waves, which gives 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 and September 2011 research can be respectively found at: http://stakeholders.ofcom.org.uk/market-data-research/telecoms-research/quality-of-customer-service/ and http://stakeholders.ofcom.org.uk/binaries/research/telecoms-research/customer-service.pdf]

Stage 2:

- An online panel survey was completed amongst consumers who had contacted their service provider(s) in the last three months. Between 1,200 and 2,200 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 four waves was identical, although there have been minor changes to the questionnaire as follows:
    - BT Vision was added as a provider in the Pay TV sector (Wave 4). However, the omnibus sample of customers who had contacted BT Vision in the last three months was considered insufficient for weighting purposes.

- In wave 2, Tiscali was combined with TalkTalk as a broadband provider (the use of Tiscali as a stand-alone brand ceased in January 2010). Tiscali and TalkTalk data for wave 1 was netted for comparative purposes.
- Between waves 1 & 2 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.
- In wave 2 a question was added about whether the contact was a complaint.

- For reporting purposes, differences over time and against the total sector ('average') are noted in the report only when they are significant – so if they are not mentioned there is no significant change or difference. Differences have been reported at the 99% confidence level, meaning that we are 99% certain that there is a real difference between the two results; this is the most stringent standard test of significance.

- Whether or not a difference is significant is determined by the sample sizes of the two scores, and also by how close the two scores are to the average score; for example, the difference between two percentages needs to be greater the closer the percentages are to 50% in order to be significant. Additionally, the weighting of the data has a slight impact on the significant testing.

- Where a September 2012 (Wave 4) result is significantly different to the average for that sector, the difference is indicated with a green circle (result significantly higher) or a red box (result significantly lower). Differences since the previous wave (between September 2011 and September 2012) are indicated by a green up arrow (significant increase) or a red down arrow (significant decrease).

- Significant differences in results between October 2009 (Wave 1) and September 2012 (Wave 4) have been indicated in the text only. Significant differences between February 2011 (Wave 2) and September 2012 (Wave 4) have been noted in the text only where the measure was introduced in Wave 2 e.g. complaints.

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.

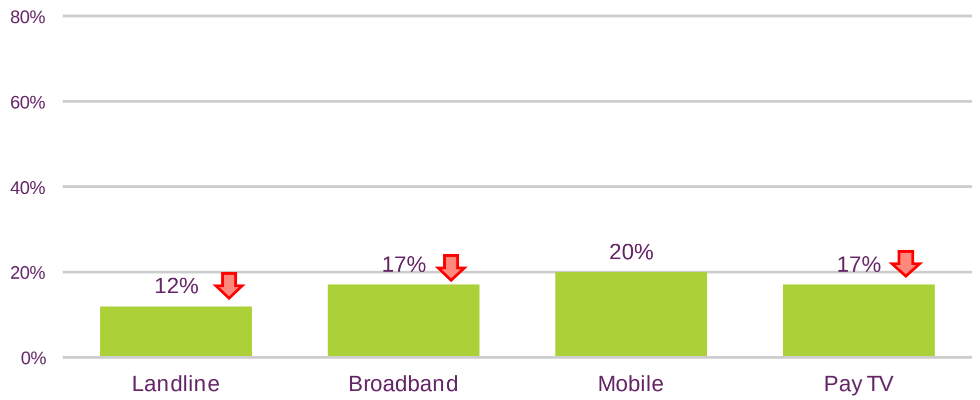
Recent contact with provider

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 was a significantly lower incidence of contact in the landline sector compared with other sectors.

There has been a year-on-year reduction in contact in the landline (from 15% to 12%), broadband (26% to 17%) and Pay TV sectors (from 23% to 17%). Contact in the Pay TV sector is also at a lower level than in 2009 (down from 26%).

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 2,730, Broadband 2,071, Mobile 2,300, Pay TV 1,475.

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

Source: GfK Omnibus survey

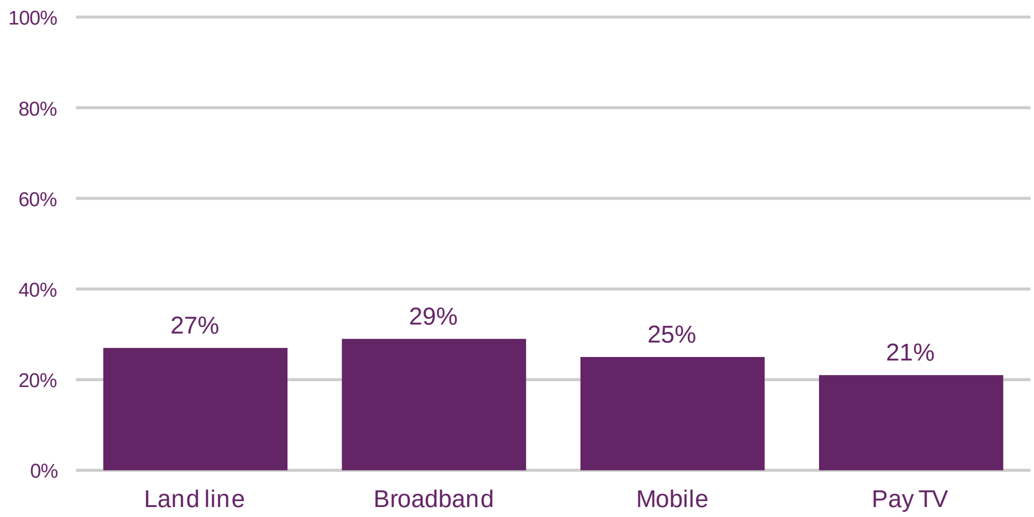
Proportion of complaints

Figure 1.2 (below) shows the proportion of recent contacts to providers that were considered by customers to be complaints.

The proportion of complaints in the Pay TV sector was significantly lower than in all other sectors. The mobile sector received a lower proportion of complaints compared with the broadband sector.

These levels of complaints are not significantly different to those seen a year ago (September 2011), but compared with February 2011, when this question was introduced, the level of complaints in the mobile sector is up (up from 20% to 25%).

Figure 1.2: 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 1,200, Broadband 1,903, Mobile 2,192, Pay TV 1,152.

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

Source: Online survey

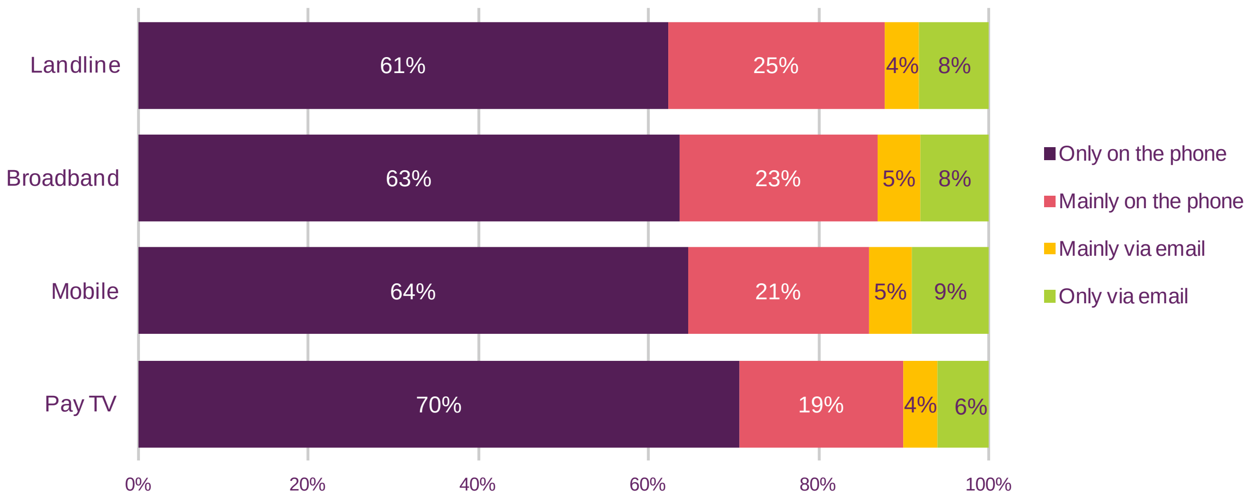
Type of contact with provider

Figure 1.3 (below) shows the way in which customers contacted their service providers.

While the majority of customers in all sectors made contact by telephone, Pay TV customers remained more likely than customers in other sectors to contact only by phone.

There have been no significant changes year-on-year, but since 2009 there has been an increase in landline customers contacting solely by email (from 5% in 2009 to 8% in September 2012.

Figure 1.3: Type of contact made most recently



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

Base: All UK households contacting provider: Landline 1,200, Broadband 1,903, Mobile 2,192, Pay TV 1,152.

/ 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.

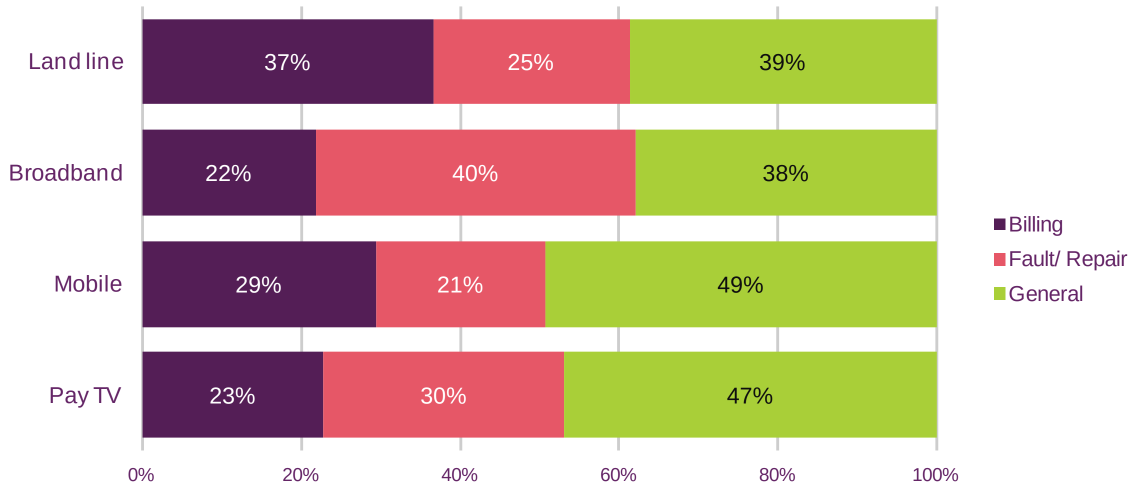
Contact profiles were categorised under billing, faults and general. 'Faults' covers fault and repair issues whilst 'general' covers all other enquiries not related to billing, faults or repairs. The three groups captured all the issues being dealt with by providers whilst helping to understand how the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

There were some significant differences in call type between the landline, broadband and mobile sectors: in the landline sector there were more billing issues, in the broadband sector there were more faults and repairs issues, and in the mobile sector there were more general issues.

Overall, the type of contact by sector is similar to that seen in previous waves of research.

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 341, Broadband 360, Mobile 457, Pay TV 253.

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

Source: GfK Omnibus survey

Degree of resolution of issue by provider

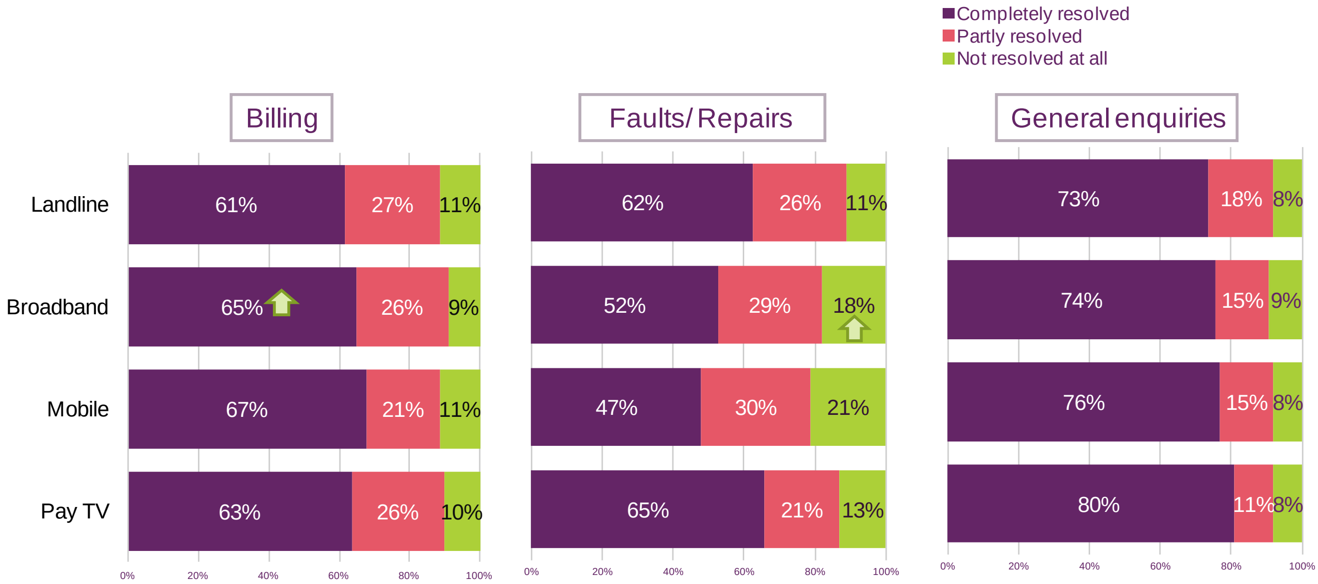
Figure 1.5 (below) shows, by issue type, whether customers considered the issue they were contacting their service provider about had been resolved.

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

Amongst those with faults/ repairs, mobile and broadband customers were less likely than landline or Pay TV customers to have said they had reached full resolution of the issue.

In the broadband sector there has been a significant year-on-year increase in the proportion of billing issues that are considered by customers to be fully resolved (up from 57% to 65%), although stated non-resolution of faults also increased (from 13% to 18%). However, neither of these latest figures is significantly different to those seen in 2009.

Figure 1.5: Whether issue considered by customer to have 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 505/304/391, Broadband: 471/888/543, Mobile 895/367/929, Pay TV 373/343/436.

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

Source: Online survey

Satisfaction with provider's customer service

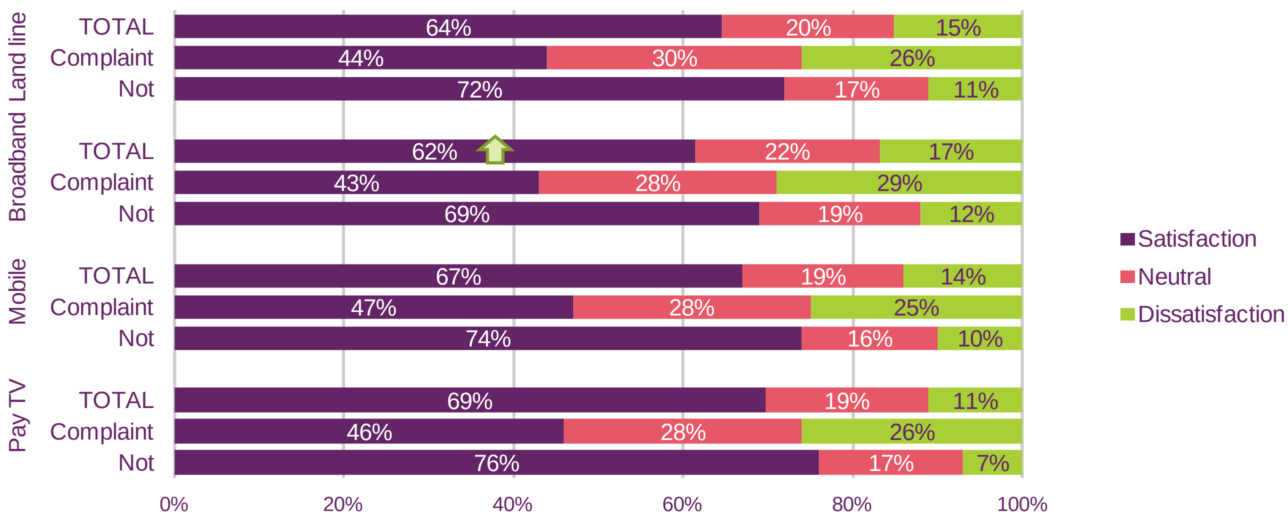
Figure 1.6 (below) shows, for each sector, how satisfied customers were with the customer service provided by their service provider during their most recent contact.

In each sector close to two thirds of customers overall were satisfied with the customer service they had received. However, landline customers were less satisfied than Pay TV customers (64% vs 69%), and satisfaction in the broadband sector was lower than both the Pay TV and mobile sectors (62% vs 69%/67%).

Customers in each sector were less satisfied when their call was a complaint.

Satisfaction with broadband customer service has improved year-on-year (from 58% to 62%). Compared with 2009, satisfaction has increased in the landline sector (up from 58% to 64%), while dissatisfaction has grown in the mobile sector (from 9% to 14%).

Figure 1.6: Satisfaction with customer service by sector



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.

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

Base: All UK households contacting provider (Total/Complaint/Not): Landline (1,200/337/863), Broadband (1,903/606/1297), Mobile (2,192/555/1637), Pay TV (1,152/262/890).

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

Source: Online survey

Interest in impartial service rating advice

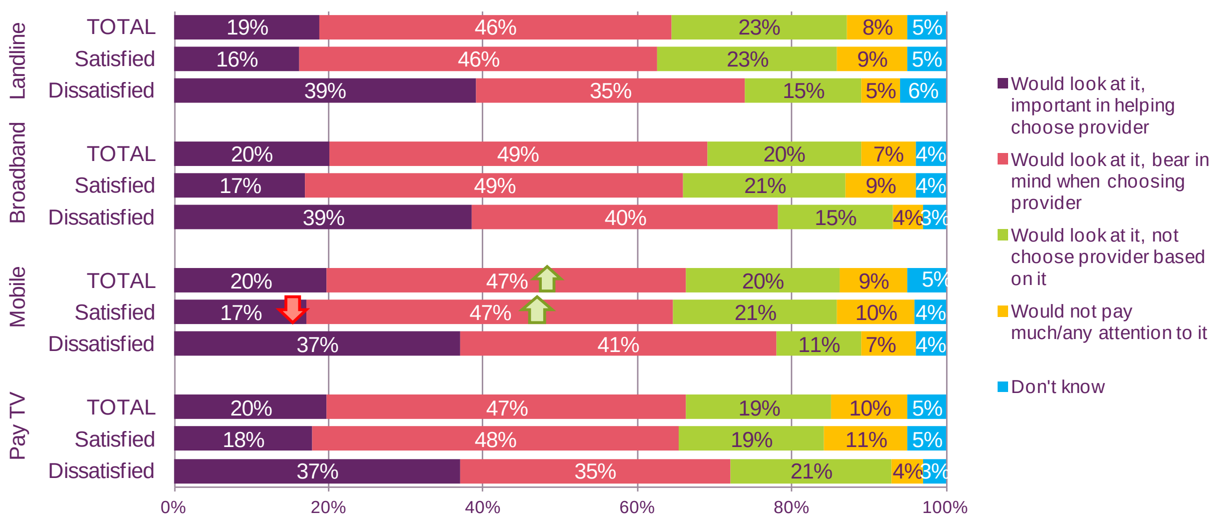
Figure 1.7 (below) shows interest in provision of impartial information about different companies' customer service ratings (amongst customers who had contacted their service provider in the previous three months).

Across all four sectors, around two thirds of customers said that they would at least bear such information in mind when choosing a service provider, while around a fifth in each sector said it would be an important factor in their decision. Dissatisfied customers in each sector were more likely to agree that impartial rating information would be important.

There has been a year-on-year increase (from 43% to 47%) in the proportion of mobile customers who say they would 'bear in mind' impartial information when choosing a supplier, which was driven by a decline in importance amongst satisfied mobile customers.

Since 2009 there has 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%), which again was driven by satisfied customers.

Figure 1.7: Need for impartial information – All services



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.

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 (Total/Satisfied/Dissatisfied): Landline 1,200/764/184, Broadband 1,903/1,135/327, Mobile 2,192/1,478/291, Pay TV 1,152/800/130.

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

Source: Online survey

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 - more so for general enquiries - with around one in ten unresolved. Faults and billing contacts are typically less likely to be fully resolved, and faults continue to require a higher than average number of calls (BT has a lower proportion of contacts regarding faults).

- BT customers are less likely than average for the sector to have contacted their provider recently and this figure has decreased year-on-year and versus 2009. Virgin Media and TalkTalk customers are more likely than average to have contacted their landline provider recently, and Virgin also has a higher than average proportion of complaints.

- No provider is significantly different to the average for the landline market in either overall satisfaction or satisfaction with customer service. In the last 12 months, satisfaction with Virgin's customer service has increased, most notably amongst non-complaint contacts. Since 2009, overall satisfaction with BT, with their customer service, and with all specific attributes of their customer service, has strengthened; as has overall satisfaction with TalkTalk.

- However, satisfaction with Sky is marginally higher than other providers on most attributes, and Sky's customers claim to be more likely to stay with their provider in light of their customer experience.

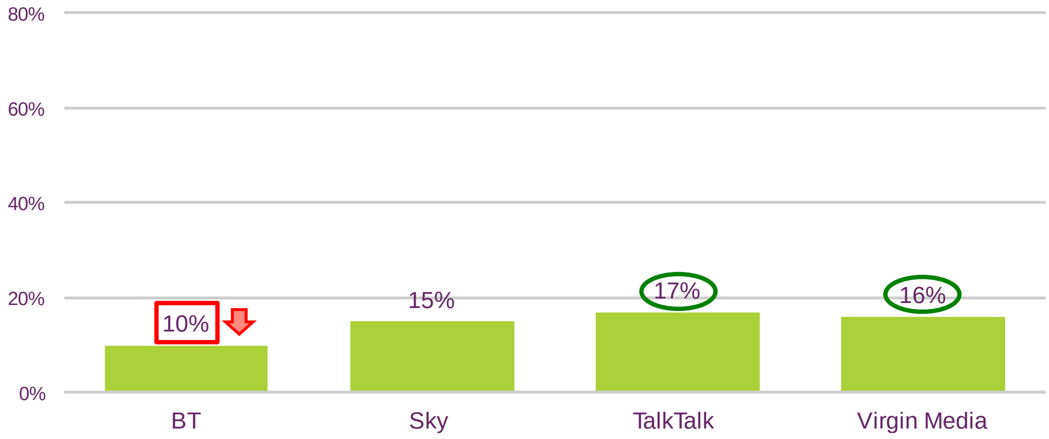
Recent contact with provider

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

The proportion of customers contacting BT was below the sector average (10% vs 12%), while levels of contact to TalkTalk and Virgin were above average.

Contact to BT has declined year-on-year (down from 14%, to 10%).

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 1,558, Sky 234, TalkTalk 400, Virgin Media 538.

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

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

Source: GfK Omnibus Survey

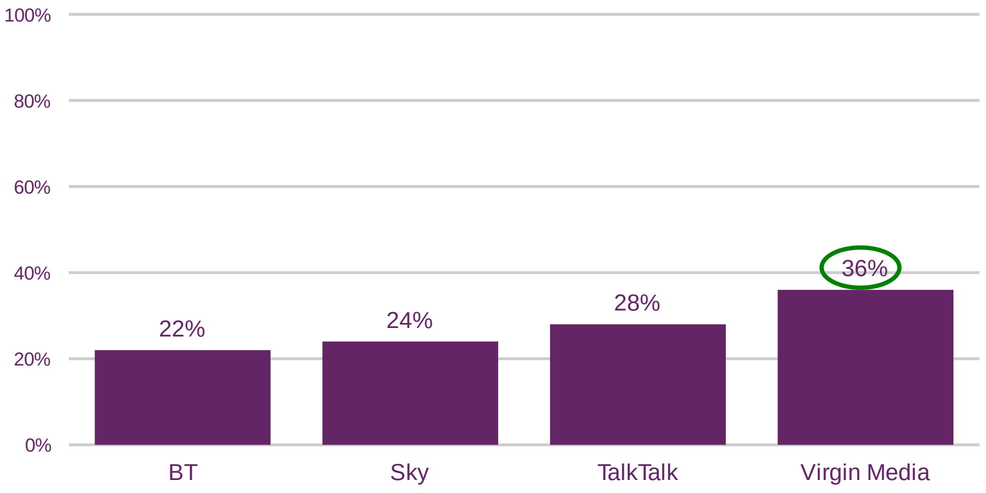
Proportion of complaints

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

On average around a quarter of contacts were deemed to be complaints (27%); the proportion of complaints to Virgin was significantly above average.

There has been no significant change in the levels of complaints since September 2011, although the proportion of complaints by Virgin customers has increased (from 23% to 36%) since the question was introduced in February 2011.

Figure 2.2: Landline – Proportion of recent contacts that were complaints



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 497, Sky 199, TalkTalk 249, Virgin Media 255.

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

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

Source: Online survey

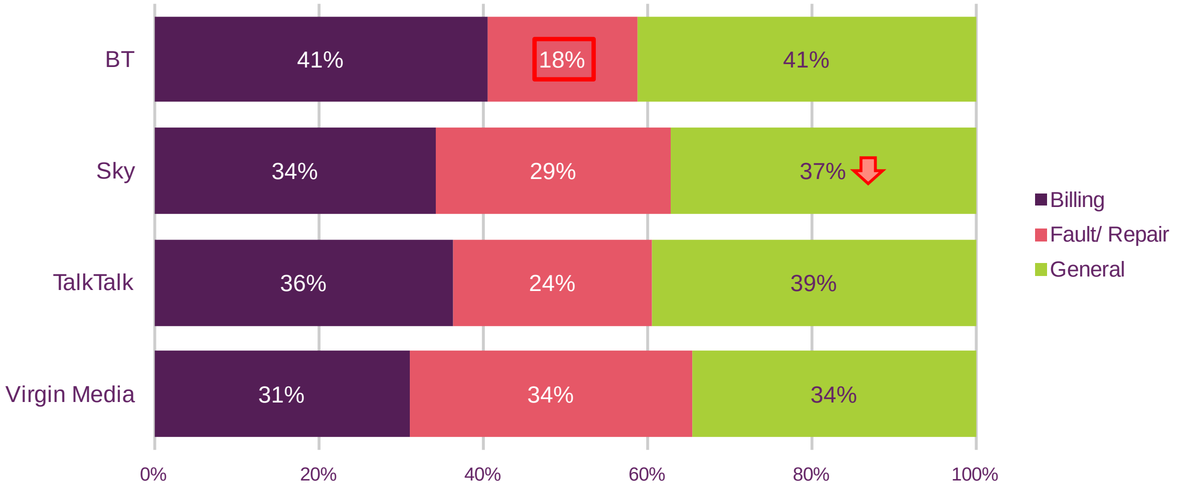
Type of call made most recently with landline provider

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

BT's proportion of faults and repairs contacts was lower than average for the sector (18% vs 25% average).

There has been a year-on-year drop in 'general' contacts to Sky (from 68% to 37%). *NB: small base sizes for Sky*

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 152, Sky 35*, TalkTalk 67, Virgin Media 87.

* indicates a base size lower than 50

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

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

Source: GfK Omnibus Survey

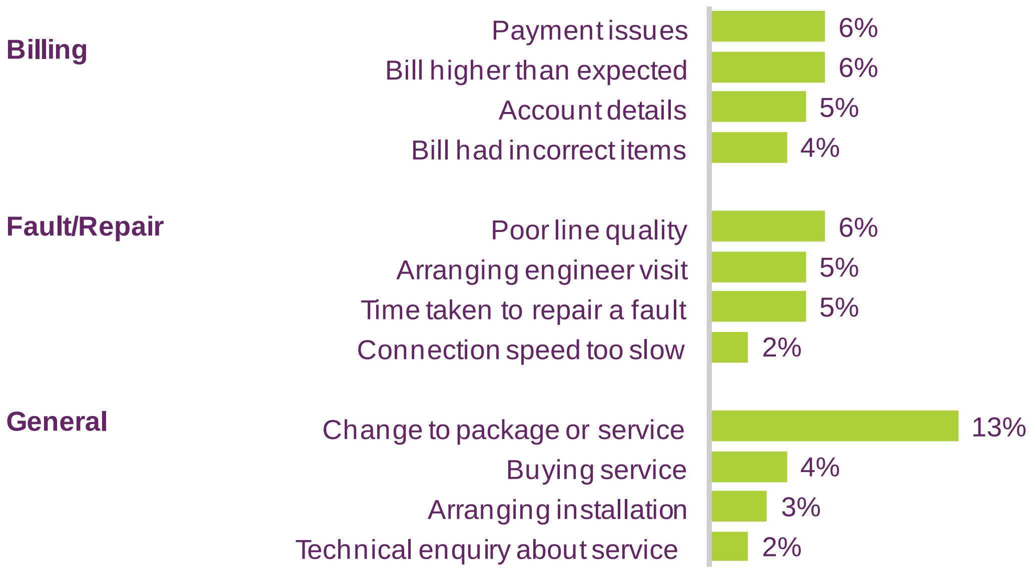
Key issues by contact type

Figure 2.4 (below) shows the most common specific reasons for recent contact with landline service providers.

The main reason for contacting landline providers was to change package or service, with the next most common reasons to do with poor line quality, payment issues or higher than expected b ills.

There were no significant changes in the reasons for contact compared with a year ago, although technical enquiries have declined since 2009 (from 4% to 2%).

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: 1,200.

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

Source: Online survey

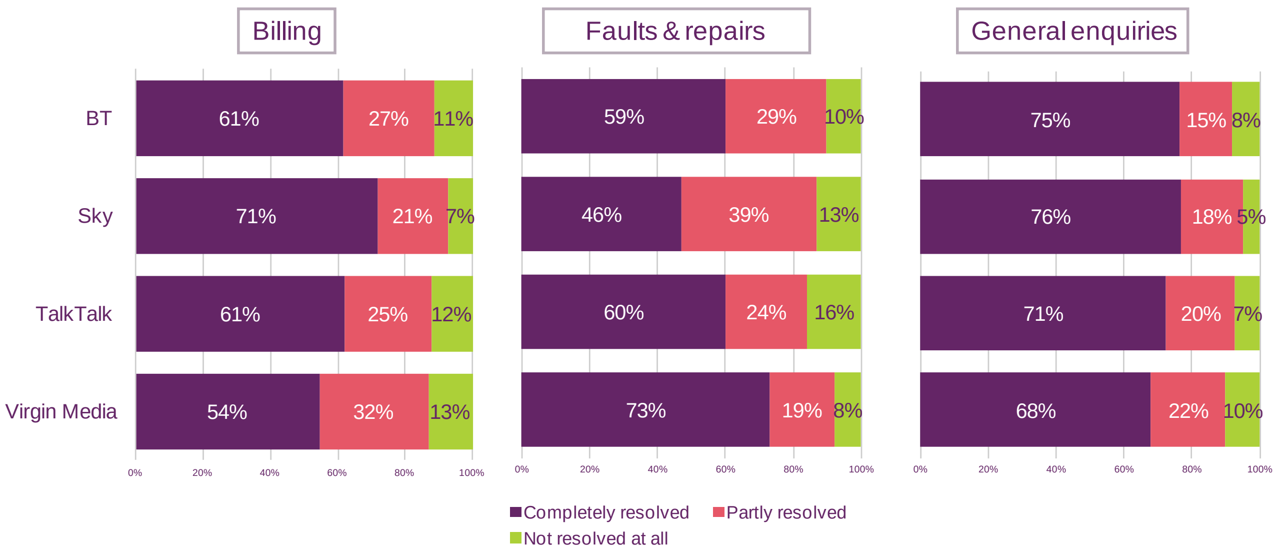
Issue resolution by landline provider

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

Overall, general issues were more likely to be completely resolved than billing and faults issues (the exception was Virgin Media, which had better faults resolution). No provider was significantly different to the average for any issue type (average ‘completely resolved’: billing 61%/ faults 62%/ general 73%).

There have been no significant changes year-on-year or compared with 2009 in terms of issue resolution.

Figure 2.5 Landline – Whether issue considered by customer to have been 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 230/124/143, Sky 70/46*/83, TalkTalk 93/50/106, Virgin Media 112/84/59.

* indicates a base size lower than 50

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

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

Source: Online survey

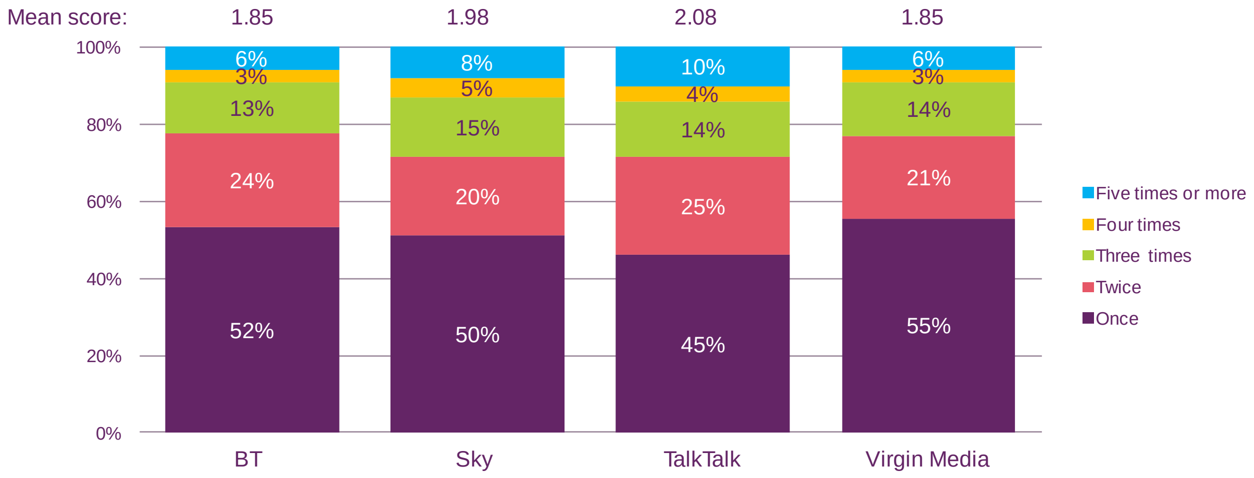
Number of contacts with landline provider

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

On average, two contacts were required to resolve issues (1.91 contacts), with around half of issues (51%) requiring only one contact. No providers were significantly different to the average for the sector.

There were no significant changes in contact frequency year-on-year, nor compared with 2009.

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 497, Sky 199, TalkTalk 249, Virgin Media 255.

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

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

Source: Online survey

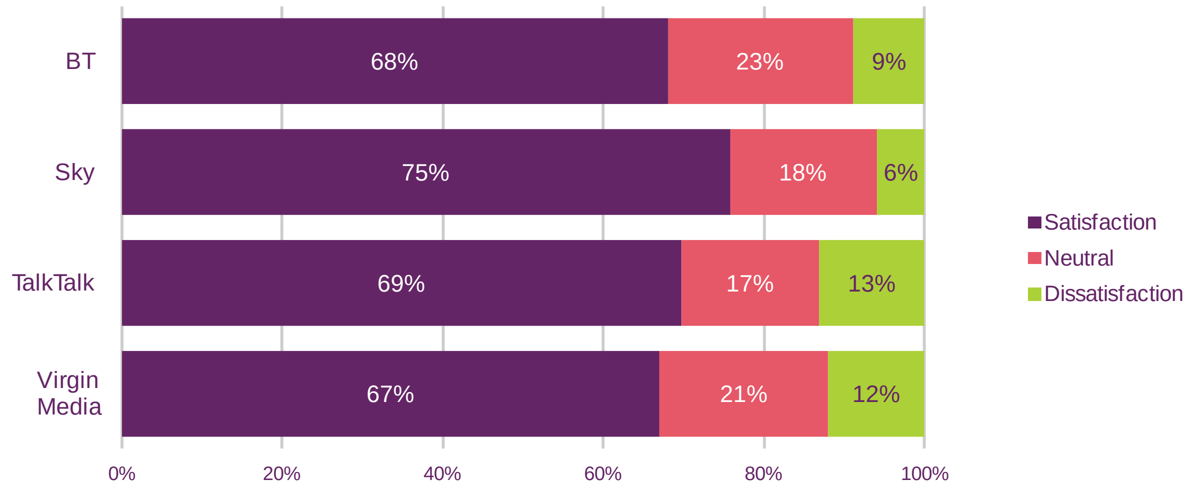
Overall satisfaction with landline provider

Figure 2.7 (below) shows levels of overall satisfaction with landline providers amongst customers who had contacted them in the last three months.

Over two thirds of customers (69% on average) were satisfied with their provider, with outright dissatisfaction comparatively low (average 10%). No provider had satisfaction levels significantly different to average.

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

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 497, Sky 199, TalkTalk 249, Virgin Media 255.

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

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

Source: Online survey

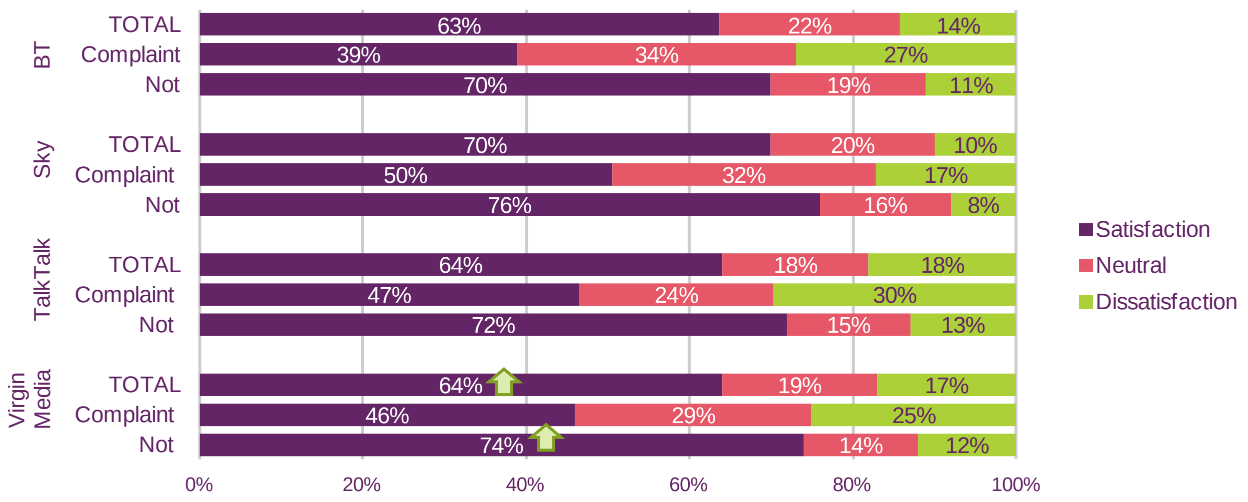
Overall satisfaction with customer service by landline provider

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

No provider had overall satisfaction levels significantly different to the average for the sector (64% satisfied, 15% dissatisfied). The average level of satisfaction for complaints was 44% compared with 72% for non-complaints.

Satisfaction with Virgin's overall customer service has increased year-on-year (from 53% to 64%), driven by increased satisfaction with non-complaints (from 60% to 74%). Satisfaction with BT's service remains higher than in 2009 (up from 55% to 63%).

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: (Total/Complaint/Not): BT 497/128/369, Sky 199/45*/154, TalkTalk 249/67/182, Virgin Media 255/97/158.

* indicates a base size lower than 50

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

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

Source: Online survey

Satisfaction with contacting customer service

Figure 2.9 (below) shows mean satisfaction scores on various aspects of contacting customer service, where 10 is extremely satisfied and 1 extremely dissatisfied.

Sky is rated above average (7.2 vs 6.5 average) on ease of getting through to the right person.

There have been no significant changes year-on-year, but there have been some improvements in ratings since 2009. Specifically, for BT in ease of finding contact details (6.6 to 7.1), for BT, Sky and TalkTalk on calling back (5.7 to 6.6/ 6.0 to 7.1/ 5.6 to 6.4 respectively), and for BT and Sky on ease of getting through (5.4 to 6.3 and 5.6 to 7.2 respectively).

Figure 2.9: Landline – Satisfaction with contacting customer service

	TOTAL	BT	Sky	TalkTalk	Virgin Media
Ease of finding provider contact details	7.3	7.1	7.3	7.1	7.6
Calling you back when they said they would	6.6	6.6	7.1	6.4	6.4
Ease of getting through to the right person *(phone only)*	6.5	6.3	7.2	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 provider landline provider (*by phone*): Total 1,200 *(1,033),* BT 497 (*440*), Sky 199 (*158*), TalkTalk 249 (*213*), Virgin Media 255 (*222*).

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

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

Source: Online survey

Satisfaction with speed of customer service

Figure 2.10 (below) shows mean satisfaction scores on various aspects to do with the speed of customer service.

No providers were significantly above or below average on speed of answering phones or time taken to handle issue.

Ratings have not changed significantly year-on-year, but there has been positive movement since 2009: for BT, Sky and Virgin on speed of answering phones (up from 5.7, 6.1, 5.7 respectively) and for BT and Virgin on time taken to handle issue (from 5.9 to 6.5/ 5.9 to 6.7 respectively).

Figure 2.10: Landline – Satisfaction with the speed of customer service

	TOTAL	BT	Sky	TalkTalk	Virgin Media
Speed of answering phones *(phone only)*	6.7	6.5	7.1	6.7	6.7
The time taken to handle issue	6.6	6.5	6.9	6.6	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 landline provider (*by phone*): Total 1,200 *(1,033),* BT 497 (*440*), Sky 199 (*158*), TalkTalk 249 (*213*), Virgin Media 255 (*222*).

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

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

Source: Online survey

Satisfaction with advice from customer service

Figure 2.11 (below) shows mean satisfaction scores for the standard of advice from customer service.

No providers were significantly above or below average on standard of advice attributes.

There has been no significant movement year-on-year, but since 2009 the following ratings have improved: for BT and Virgin in terms of easy to understand advice (from 6.2 to 7.0/ 6.7 to 7.2 respectively), and for BT and TalkTalk on usefulness of advice (from 6.1 to 6.9/ 6.1 to 6.6 respectively) and getting the issue resolved (from 6.1 to 6.8/ 5.9 to 6.6 respectively).

Figure 2.11: Landline – Satisfaction with the standard of advice from customer service

	TOTAL	BT	Sky	TalkTalk	Virgin Media
Advice/ information was easy to understand	7.0	7.0	7.2	6.8	7.2
Advice/ information was useful	6.8	6.9	7.1	6.6	6.9
Getting the issue resolved to your satisfaction	6.8	6.8	7.0	6.6	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 landline provider: Total 1,200, BT 497, Sky 199, TalkTalk 249, Virgin Media 255.

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

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

Source: Online survey

Satisfaction with customer service adviser

Figure 2.12 (below) shows mean satisfaction with the customer service adviser.

No providers were significantly above or below average on adviser satisfaction attributes.

There were no significant changes since September 2011, but once again ratings have improved since 2009, particularly for BT and TalkTalk; more specifically for BT and Virgin on courtesy (from 6.9 to 7.7/ 7.1 to 7.6 respectively), for BT and TalkTalk on understanding the issue (6.3 to 7.0/ 6.1 to 6.7), taking issue seriously (6.6 to 7.4/ 6.6 to 7.2), keeping informed (6.2 to 7.0/ 6.1 to 6.8), adviser doing what they said (6.3 to 7.2/ 6.4 to 6.9), and for BT and Sky in terms of logging query details (from 5.8 to 6.7/ 6.3 to 7.1 respectively).

Figure 2.12: Landline – Satisfaction with the customer service adviser

	TOTAL	BT	Sky	TalkTalk	Virgin Media
Courtesy and politeness of advisers	7.6	7.7	7.7	7.4	7.6
Adviser ability to understand the issue and identify the problem	7.0	7.0	7.3	6.7	7.0
Adviser took my questions/ issue seriously	7.3	7.4	7.4	7.2	7.2
Keeping you informed throughout the process	6.9	7.0	7.3	6.8	6.8
Adviser doing what they say they would do	7.1	7.2	7.4	6.9	7.0
Logging of query details to avoid having to repeat yourself	6.7	6.7	7.1	6.3	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 landline provider: Total 1,200, BT 497, Sky 199, TalkTalk 249, Virgin Media 255.

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

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

Source: Online survey

Satisfaction with other aspects of customer service

Figure 2.13 (below) shows mean satisfaction scores for more general customer service attributes.

No providers were significantly above or below average on these attributes.

TalkTalk has improved its rating on offering compensation since a year ago (up from 5.1 to 5.7).

Compared with 2009, BT, Sky and TalkTalk are now rated higher in terms of offering compensation (from 4.3 to 5.2/ 5.1 to 6.0/ 4.6 to 5.7 respectively) and BT's rating on willingness to help has also improved (from 6.4 to 7.1).

Figure 2.13: Landline – Satisfaction with other aspects of customer service

	TOTAL	BT	Sky	TalkTalk	Virgin Media
Offering compensation or a goodwill payment	5.4	5.2	6.0	5.7 ⇧	5.3
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 landline provider: Total 1,200, BT 497, Sky 199, TalkTalk 249, Virgin Media 255.

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

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

Source: Online survey

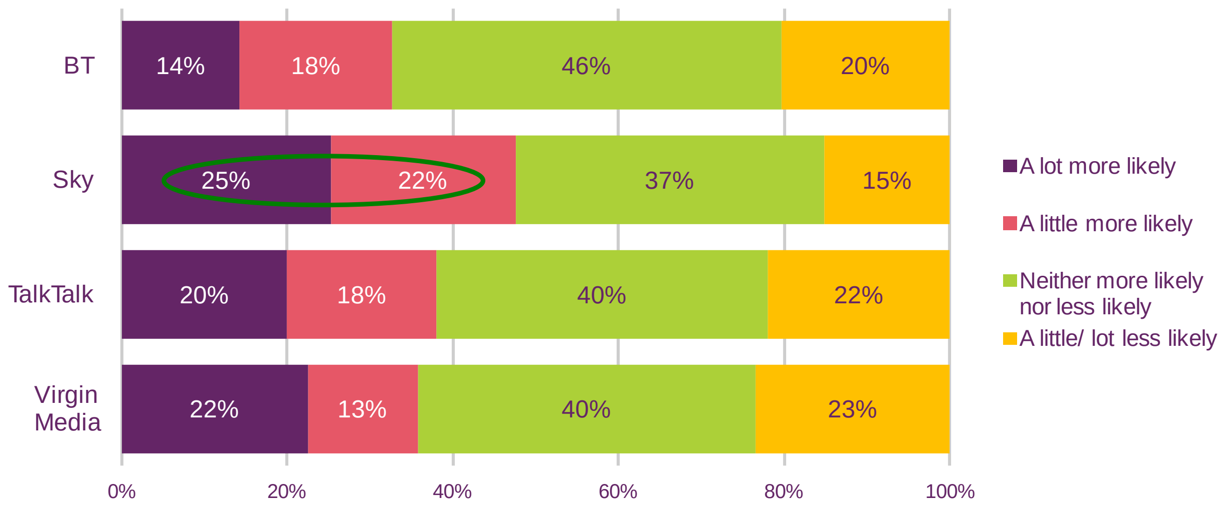
Future use of provider given customer service experience

Figure 2.14 (below) shows the likelihood of using each landline provider in the future, in light of the customer service experience during the most recent contact.

Sky customers are more likely overall than average to stay with their landline provider (47% vs 36% average).

There has been no significant movement in levels of claimed loyalty to landline providers either year-on-year or compared with 2009.

Figure 2.14: 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 497, Sky 199, TalkTalk 249, Virgin Media 255.

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

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

Source: Online survey

Broadband sector

This section looks specifically at the 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 broadband provider remains connection speed, followed by package/ service change. Billing and faults issues are generally less likely to be fully resolved, and faults require more contacts with the provider – particularly compared with general issues.
- The level of contact with each of BT, Orange and Sky is lower than average for the sector and has fallen year-on-year. TalkTalk and Virgin are contacted more often, with the level of contacts to the latter up since 2009 (although not significantly different year-on-year).
- The proportion of complaints to Orange and Virgin has increased since first measured in February 2011, and has declined for TalkTalk, resulting in all providers having a similar level of complaints. No provider is significantly different to the average for the sector in overall satisfaction or in satisfaction with customer service. Satisfaction with Orange has strengthened since 2009, but there has been no significant change in level of complaints or satisfaction with any provider in the last 12 months.
- Sky's advisers are rated above average for the sector and ratings have improved year-on-year, as has the time taken to handle issues. There has been little change in satisfaction ratings for other broadband providers over the last 12 months, although ratings of all providers in most areas of customer service are higher than in 2009 (with the exception of Virgin's standard of advice).
- In line with the similarity in satisfaction levels, loyalty to providers based on recent service is also at a similar level across providers.

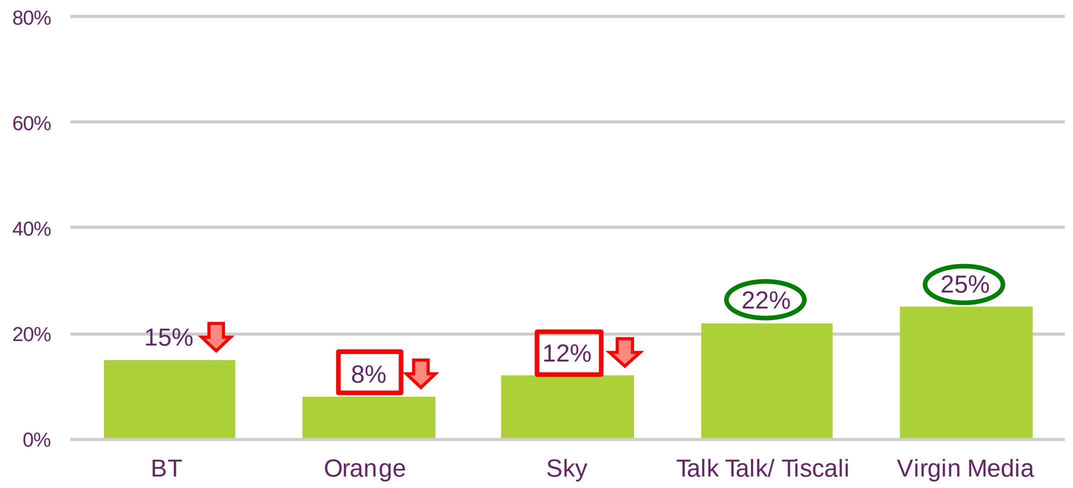
Recent contact with provider

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

Contact levels for Orange and Sky were below average for the broadband sector (8% and 12% respectively vs 17% average), while TalkTalk and Virgin had above average levels of contact (22%/25% respectively).

The proportion of broadband customers contacting their provider has fallen year-on-year for BT (25% to 15%), Orange (30% to 8%) and Sky (23% to 12%). Contact to Virgin has not changed significantly since last year, although it has increased vs 2009 (from 13% to 25%).

Figure 3.1: Broadband – Proportion of customers that contacted their 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 803, Orange 143, Sky 321, TalkTalk 397, Virgin Media 407.

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

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

Source: GfK Omnibus Survey

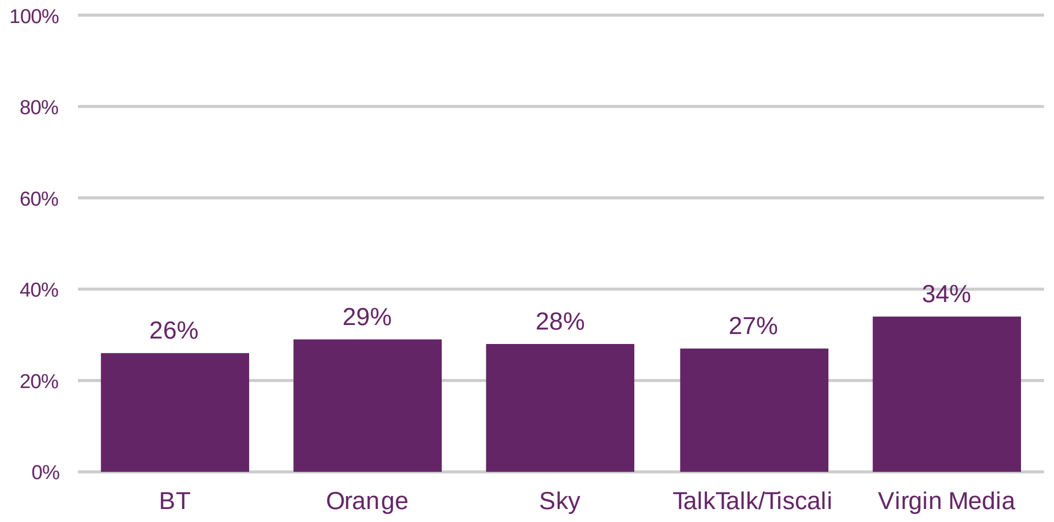
Proportion of complaints

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

No broadband provider had a proportion of complaints that was above or below the average for the sector (29%).

There were no significant year-on-year changes, but since the complaints question was added in February 2011, there has been an increase for Orange (15% to 29%) and Virgin (25% to 34%) and a drop for TalkTalk (from 36% to 27%).

Figure 3.2: Broadband – Proportion of recent contacts that were complaints



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 477, Orange 205, Sky 355, TalkTalk 391, Virgin Media 475.

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

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

Source: Online survey

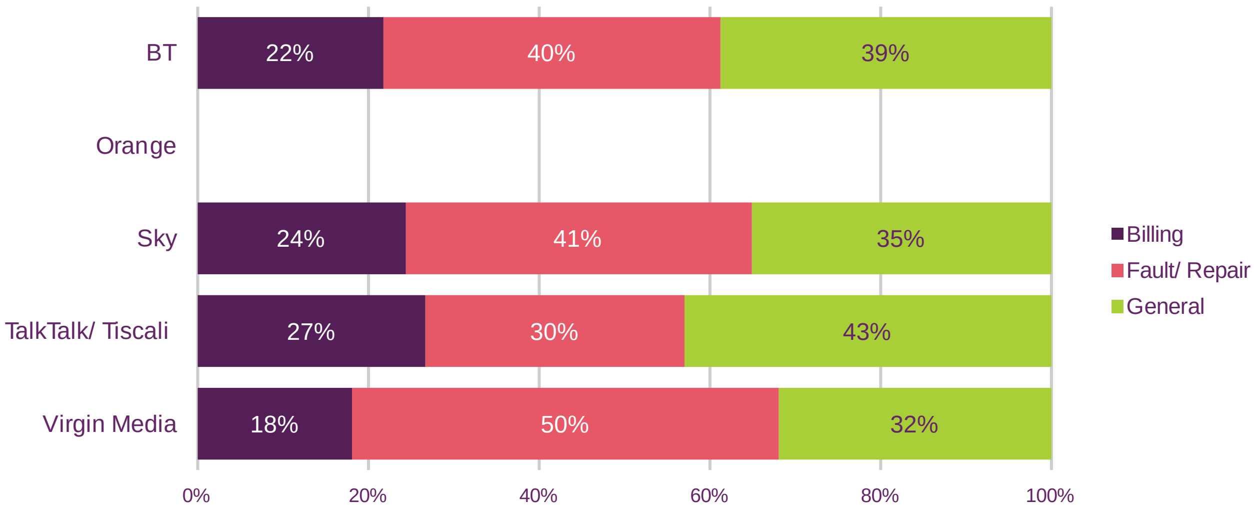
Type of call made most recently with broadband provider

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

Billing queries were least common amongst all providers in the broadband sector. There were no differences from average for any provider (average billing 22%, faults 40%, general 38%). *NB: data for Orange has not been shown due to low sample size.*

There were no significant changes year-on-year, although since 2009 the proportion of faults and repairs contacts to TalkTalk has reduced (from 50% to 30%).

Figure 3.3: 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 124, Sky 37*, TalkTalk 85, Virgin Media 103.

* indicates a base size lower than 50

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

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

Source: GfK Omnibus Survey

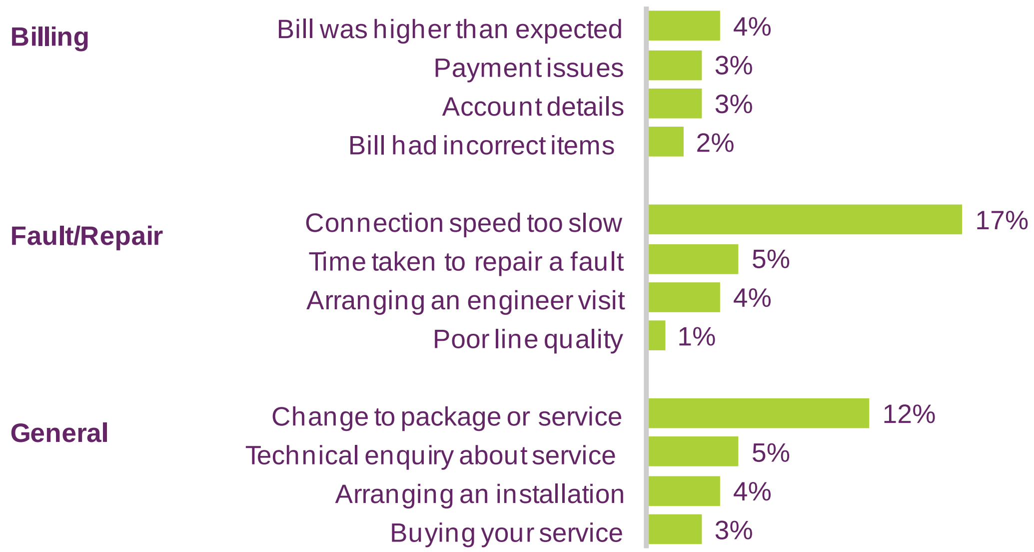
Key issues by contact type

Figure 3.4 (below) shows the most common specific reasons for recent contact with broadband service providers.

The most common reason for contact with a broadband provider remained slow connection speed (17%), followed by changing package or service (12%).

There were no notable changes in reasons for contact versus last year, but compared with 2009 there were fewer technical enquiries (down from 9% to 5%) and fewer contacts regarding line quality (down from 4% to 1%).

Figure 3.4: 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: 1,903.

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

Source: Online survey

Issue resolution by broadband provider

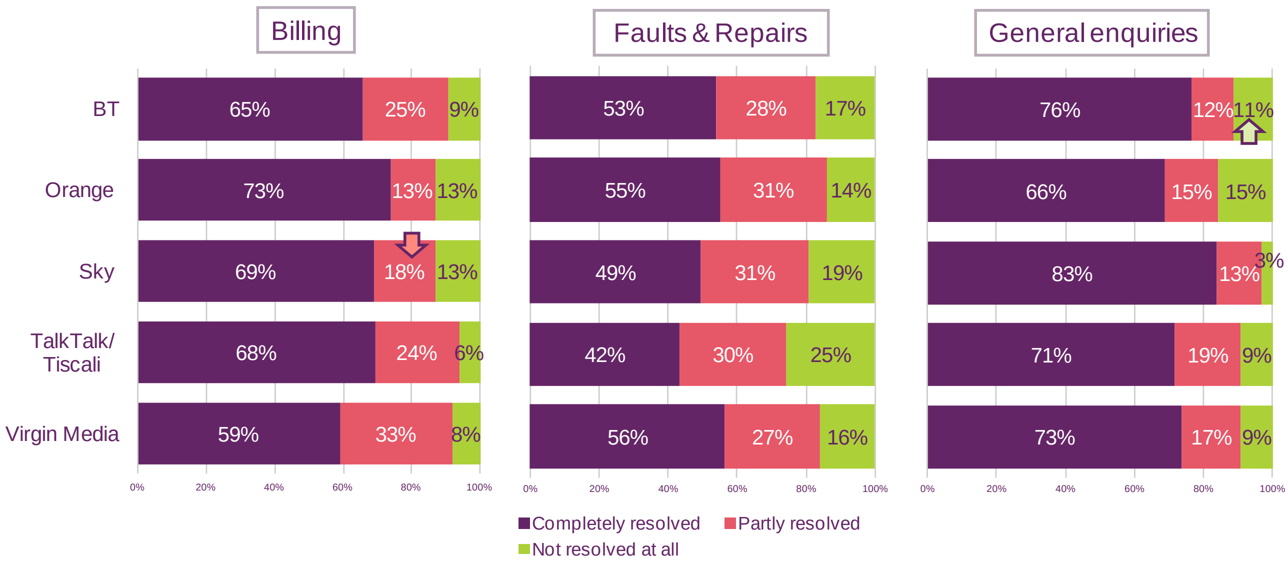
Figure 3.5 (below) shows the degree of issue resolution by broadband providers, as perceived by customers.

In the customers' view, general issues were more often completely resolved, while faults were least likely to be resolved. There were no differences by provider versus the averages in terms of resolution by issue type (average 'completely resolved': billing 65%, faults 52%, general 74%).

There has been a year-on-year increase in the proportion of BT general issues that are considered to be unresolved, and a drop in the proportion of Sky billing issues that are only partly resolved (from 35% to 18%) - with the movement towards full resolution.

There are no significant differences versus 2009.

Figure 3.5: Broadband – Whether issue considered by customer to have been 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 130/208/138, Orange 40*/94/71, Sky 89/172/94, TalkTalk 96/173/122, Virgin Media 116/241/118.

* indicates a base size lower than 50

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

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

Source: Online survey

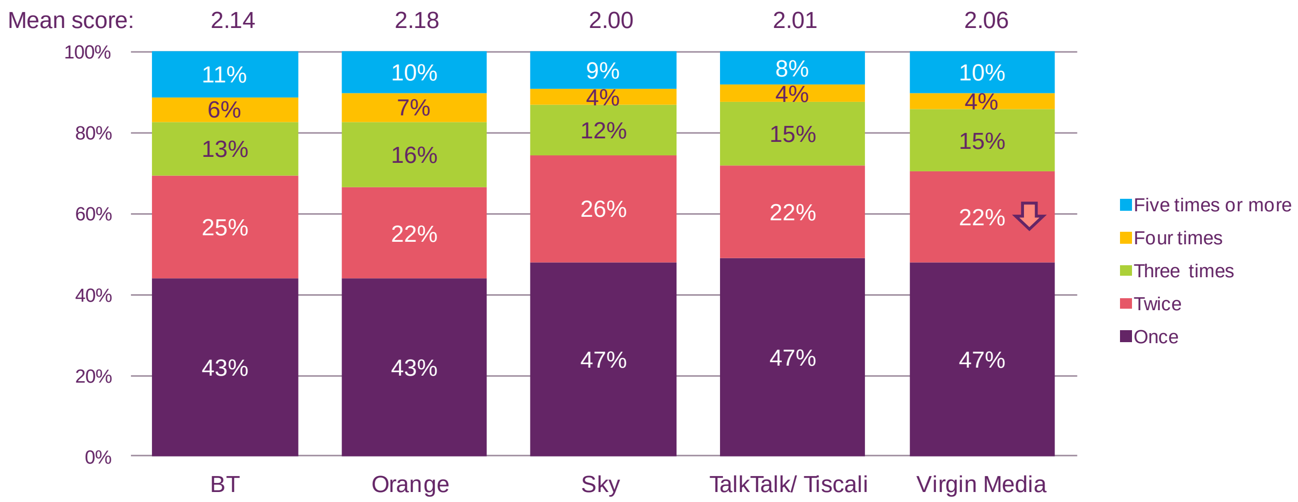
Number of contacts made to service provider

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

Two contacts (average 2.1) were needed by customers of all broadband providers, with just under half of issues (46%) needing only one contact and around one in ten requiring five or more.

There has been a drop since last year in the proportion of customers needing to contact Virgin twice – although no drop in the average number of contacts required. Compared with 2009, there has been a reduction in the number of contacts required to TalkTalk (mean number of contacts down from 2.33 to 2.01, one contact up from 37% to 47%, five or more contacts down from 15% to 8%).

Figure 3.6: 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 477, Orange 205, Sky 355, TalkTalk 391, Virgin Media 475.

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

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

Source: Online survey

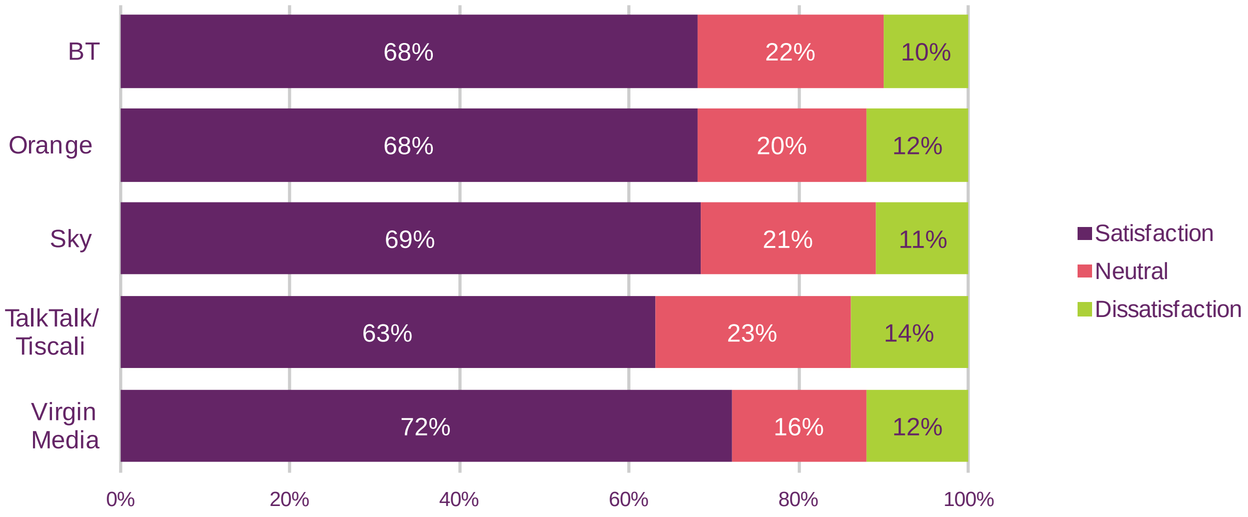
Overall satisfaction by provider

Figure 3.7 (below) shows levels of overall satisfaction with broadband providers amongst customers who had contacted them in the last three months.

No provider was above or below average for the sector in terms of overall satisfaction (average satisfaction 68%).

There were no significant changes year-on-year, but compared with 2009, Orange satisfaction is up (from 40% to 70%).

Figure 3.7: 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 477, Orange 205, Sky 355, TalkTalk 391, Virgin Media 475.

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

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

Source: Online survey

Overall satisfaction with customer service by provider

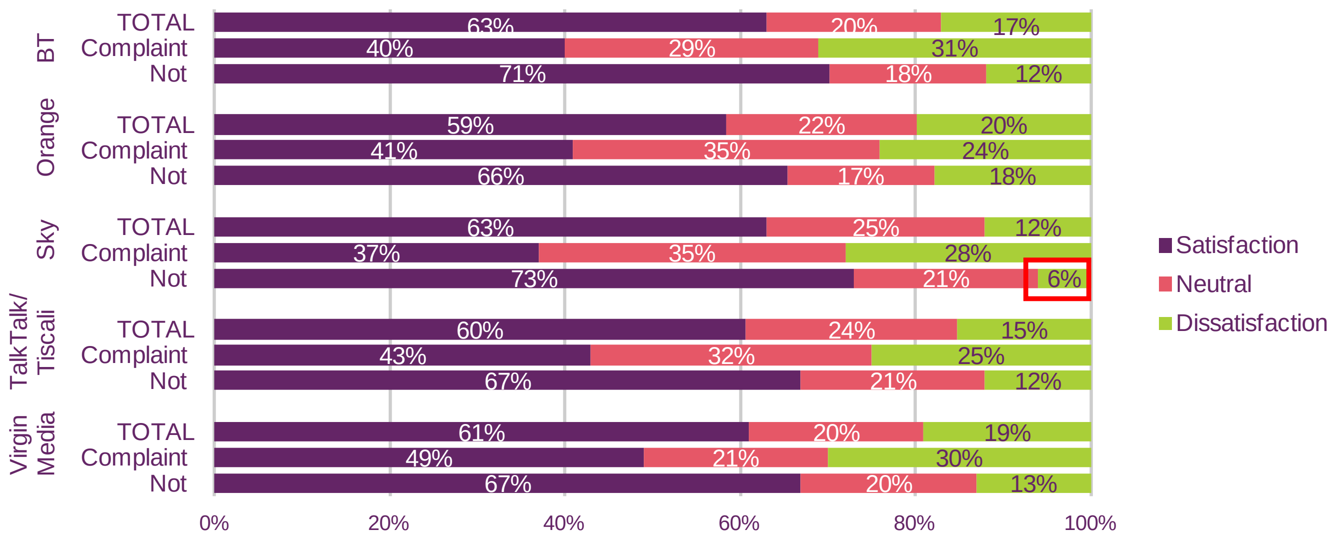
Figure 3.8 (below) shows levels of satisfaction with the customer service from broadband providers.

As with overall satisfaction, no provider was above or below the average for the sector in terms of satisfaction with customer service (average satisfaction 62%).

Average satisfaction for complaints handling was 43% and for non-complaints was 69%. Dissatisfaction with Sky's handling of non-complaints was below average.

There is no change versus September 2011, but satisfaction with Orange customer service has improved since 2009 (up from 42% to 59%).

Figure 3.8: 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 (Total/Complaint/Not): BT 477/134/343, Orange 205/66/139, Sky 355/107/248, TalkTalk 391/126/265, Virgin Media 475/173/302.

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

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

Source: Online survey

Satisfaction with contacting customer service

Figure 3.9 (below) shows mean satisfaction scores on various aspects of contacting customer service, based on 10 being extremely satisfied and 1 being extremely dissatisfied.

No provider was rated above or below average for the sector on ease of finding contact details.

There has been year-on-year improvement in the rating for Sky on ease of finding contact details (from 7.0 to 7.4).

Compared with 2009 there have been improvements for all providers on almost all these attributes, as follows: ease of finding contact details (up from 6.5 BT, 5.7 Orange, 6.7 Sky, 6.3 TalkTalk), calling back (up from 6.0 BT, 4.6 Orange, 5.9 Sky, 5.7 TalkTalk, 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).

Figure 3.9: Broadband – Satisfaction with contacting customer service

	TOTAL	BT	Orange	Sky	TalkTalk / Tiscali	Virgin Media
Ease of finding provider contact details	7.3	7.2	7.5	7.4 ⇧	7.1	7.5
Calling you back when they said they would	6.6	6.8	6.9	6.9	6.3	6.5
Ease of getting through to the right person *(phone only)*	6.5	6.3	6.9	6.9	6.3	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 (*by phone):* Total 1,903 *(1,659),* BT 447 (*415),* Orange 205 *(176)*, Sky 355 *(309)*, TalkTalk 391 *(331)*, Virgin Media 475 *(428)*.

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

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

Source: Online survey

Satisfaction with speed of customer service

Figure 3.10 (below) shows mean satisfaction scores on various aspects to do with the speed of customer service.

Orange was rated above average for the sector on speed of answering phones (7.2 vs average 6.6), but no provider was different from average on time taken to handle issue.

Compared with September 2011, Sky has improved its rating of time taken to handle issues (from 6.4 to 6.8).

As with ratings on contacting providers, ratings on speed have strengthened almost across the board since 2009, specifically: speed of answering (up from 5.7 BT, 5.0 Orange, 5.8 Sky, 5.6 TalkTalk, 5.9 Virgin), and time taken (up from 5.9 BT, 4.9 Orange, 6.2 Sky, 5.8 TalkTalk).

Figure 3.10: Broadband – Satisfaction with the speed of customer service

	TOTAL	BT	Orange	Sky	TalkTalk / Tiscali	Virgin Media
Speed of answering phones *(phone only)*	6.6	6.5	7.2	6.9	6.5	6.5
The time taken to handle issue	6.5	6.4	6.5	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 broadband provider (*by phone):* Total 1,903 *(1,659),* BT 447 (*415),* Orange 205 *(176)*, Sky 355 *(309)*, TalkTalk 391 *(331)*, Virgin Media 475 *(428)*.

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

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

Source: Online survey

Satisfaction with advice from customer service

Figure 3.11 (below) shows mean satisfaction scores for the standard of advice from customer service.

No provider was significantly different to the sector average in this area of customer service.

There were no year-on-year changes, but there have been improvements on almost all attributes for all providers except Virgin since 2009, specifically: easy to understand advice (up from 6.4 BT, 5.7 Orange, 6.7 Sky, 6.2 TalkTalk), useful advice (up from 6.2 BT, 5.5 Orange, 6.0 TalkTalk), issue resolution (up from 6.3 BT, 5.4 Orange, 6.4 Sky, 6.0 TalkTalk).

Figure 3.11: Broadband – Satisfaction with the standard of advice from customer service

	TOTAL	BT	Orange	Sky	TalkTalk / Tiscali	Virgin Media
Advice/ information was easy to understand	6.9	6.9	6.9	7.2	6.6	6.9
Advice/ information was useful	6.7	6.8	6.5	7.0	6.6	6.6
Getting the issue resolved to your satisfaction	6.6	6.7	6.3	6.9	6.5	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: Total 1,903, BT 447, Orange 205, Sky 355, TalkTalk 391, Virgin Media 475.

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

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

Source: Online survey

Satisfaction with customer service adviser

Figure 3.12 (below) shows mean satisfaction with the customer service adviser.

Sky advisers were rated significantly above the sector average in terms of identifying the problem (7.4 vs average 6.8), keeping the customer informed (7.4 vs average 6.9) and logging details (7.2 vs average 6.6).

Compared with a year ago, there have been improvements in ratings for Sky advisers on keeping you informed (up from 7.0 to 7.4), doing what they say (up from 7.1 to 7.5) and logging details (up from 6.7 to 7.2).

Since 2009 all providers have improved their performance, as follows: courtesy (up from 7.3 BT, 6.7 Orange, 7.3 Sky, 7.2 Virgin), understanding the issue (up from 6.3 BT, 5.6 Orange, 6.7 Sky, 6.1 TalkTalk), 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), doing what they say (up from 6.6 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).

Figure 3.12: Broadband – Satisfaction with the customer service adviser

	TOTAL	BT	Orange	Sky	TalkTalk /Tiscali	Virgin Media
Courtesy and politeness of advisers	7.7	7.9	7.8	7.9	7.4	7.6
Adviser ability to understand the issue and identify the problem	6.8	6.9	6.7	7.4	6.5	6.8
Adviser took my questions/issue seriously	7.3	7.5	7.2	7.6	7.1	7.3
Keeping you informed throughout the process	6.9	6.9	6.9	7.4	6.7	6.8
Adviser doing what they say they would do	7.1	7.2	7.1	7.5	6.8	7.1
Logging of query details to avoid having to repeat yourself	6.6	6.6	6.6	7.2	6.3	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: Total 1,903, BT 447, Orange 205, Sky 355, TalkTalk 391, Virgin Media 475.

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

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

Source: Online survey

Satisfaction with other aspects of customer service

Figure 3.13 (below) shows mean satisfaction scores for more general customer service attributes.

No providers were rated significantly above or below average on these service aspects.

There has been a year-on-year drop in the rating of Virgin on offering compensation (from 5.5 to 5.1).

As with other areas of customer service, ratings were up versus 2009 for all providers, as follows: offering compensation (up from 4.2 BT, 3.4 Orange, 4.9 Sky, 4.1 TalkTalk), willingness to help (up from 5.9 Orange. 6.8 Sky, 6.4 TalkTalk, 6.7 Virgin).

Figure 3.13: Broadband – Satisfaction with <u>other aspects</u> of customer service

	TOTAL	BT	Orange	Sky	TalkTalk / Tiscali	Virgin Media
Offering compensation or a goodwill payment	5.1	4.9	5.3	5.4	5.2	5.1 ⇩
Willingness to help resolve your issue	7.1	7.1	7.1	7.4	6.8	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 broadband provider: Total 1,903, BT 447, Orange 205, Sky 355, TalkTalk 391, Virgin Media 475.

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

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

Source: Online survey

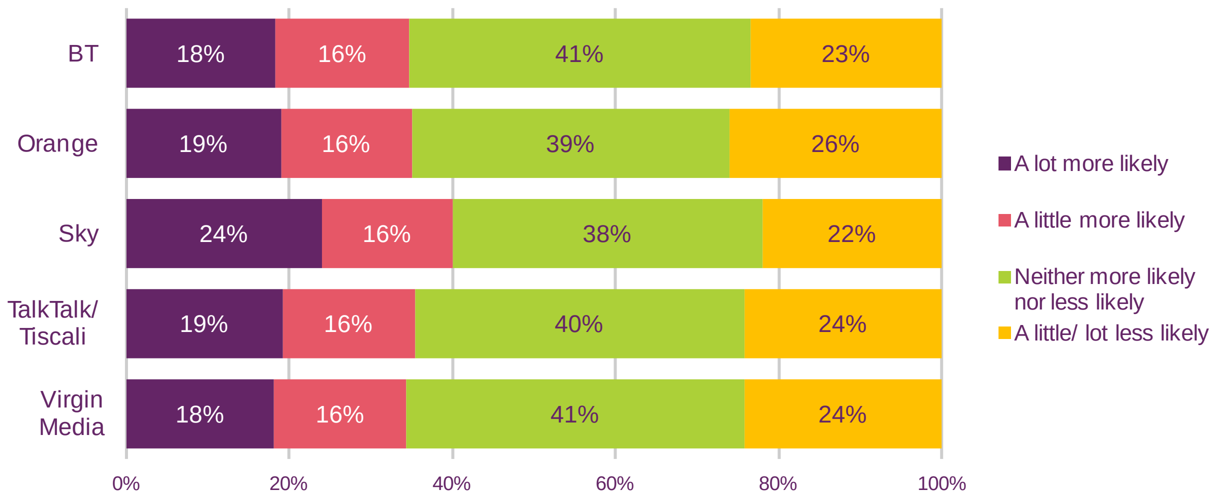
Future use of provider given customer service experience

Figure 3.14 (below) shows the likelihood of using each broadband provider in the future, in light of the customer service experience during the most recent contact.

No provider had loyalty above or below average for the sector (average ‘a lot/little more likely’ 19%/16%, ‘a little/lot less’ 23%).

There has been no significant change in loyalty since September 2011, but compared with 2009 Orange customers are less disloyal (‘less likely to use’ down from 42% to 26%).

Figure 3.14: 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 477, Orange 205, Sky 355, TalkTalk 391, Virgin Media 475.

/ indicates significantly higher/ lower than average (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 phone network providers is to change package, and this type of enquiry is usually fully resolved. The smaller proportion of faults enquiries - increasingly dominated by poor reception - is less well resolved (O2 is better at this), and requires more contacts.

- The level of recent contacts to Three Mobile has dropped year-on-year, leaving all providers with similar contact levels. Three no longer stands out as having a higher level of complaints or faults, nor for requiring more contacts to resolve issues. This has contributed to Three's satisfaction levels no longer being below the sector average.

- O2 achieves significantly higher than average overall satisfaction and satisfaction with customer service; specifically, O2 is rated above average on being easier to contact, giving clearer advice, being quicker at handling and resolving issues, understanding the problem, logging details and offering compensation.

- Dissatisfaction is higher than average amongst Virgin customers. Overall satisfaction is down year-on-year for Vodafone, while Orange and T-Mobile have seen a drop in satisfaction since last year for time taken to handle issues.

- O2 customers are no longer more likely to stay with the provider because of their customer service; loyalty to O2 and also to Vodafone and Orange, has declined year-on-year.

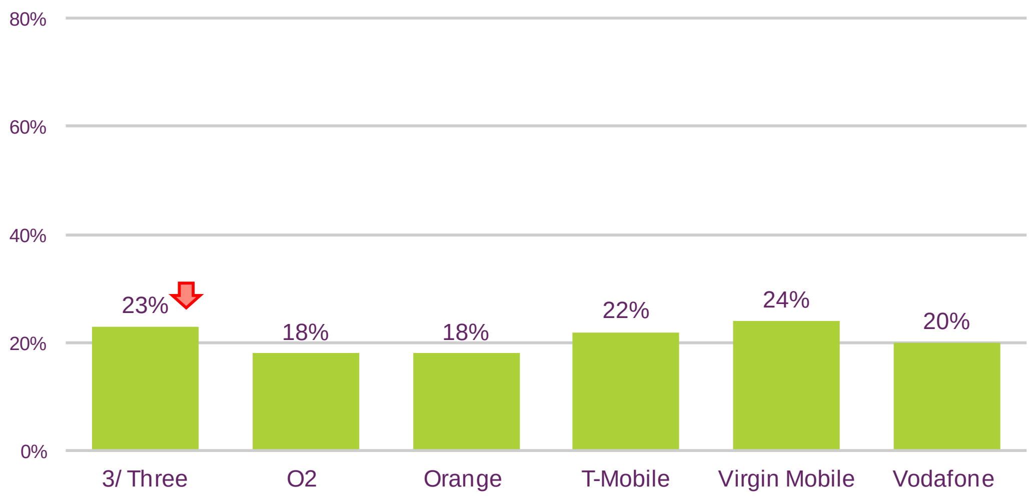
Recent contact with provider

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

No mobile phone network provider had a contact level significantly above or below average for the sector (20%).

The level of contact to Three Mobile has declined year-on-year (from 39% to 23%), and contact is also down relative to 2009 (from 37% to 23%).

Figure 4.1: Mobile – Proportion of customers that contacted their mobile phone network 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 network providers: 3/ Three 193, O2 575, Orange 665, T-Mobile 296, Virgin Mobile 186, Vodafone 385.

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

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

Source: GfK Omnibus Survey

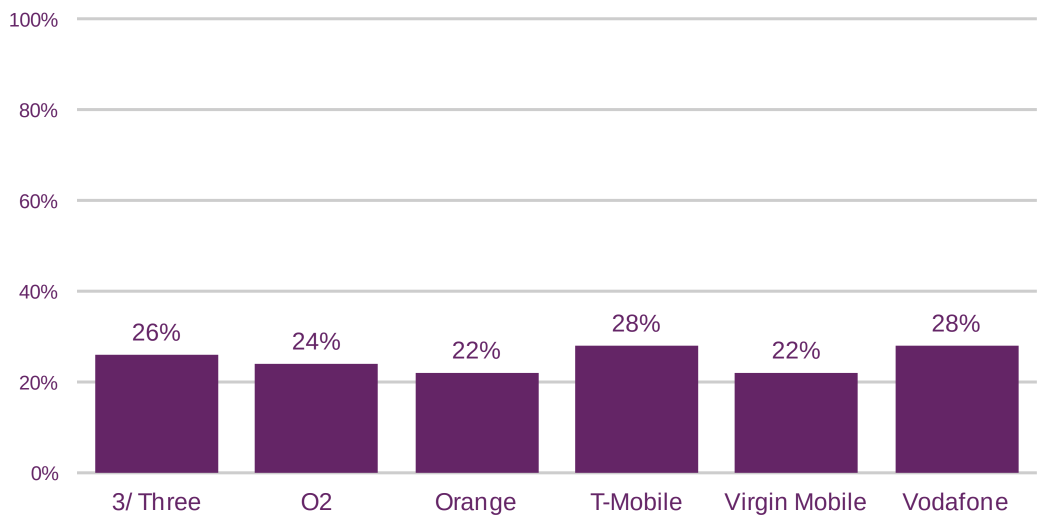
Proportion of complaints

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

No providers had levels of complaints above or below average for the sector (25%).

There was no significant year-on-year change in the proportion of complaints by provider, but compared with February 2011 (when the complaints question was introduced), the proportion of complaints to both O2 and T-Mobile has risen (from 17% to 24% and 18% to 28% respectively).

Figure 4.2: Mobile – Proportion of recent contacts that were complaints



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 network provider: 3/ Three 224, O2 526, Orange 507, T-Mobile 317, Virgin Mobile 208, Vodafone 410.

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

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

Source: Online survey

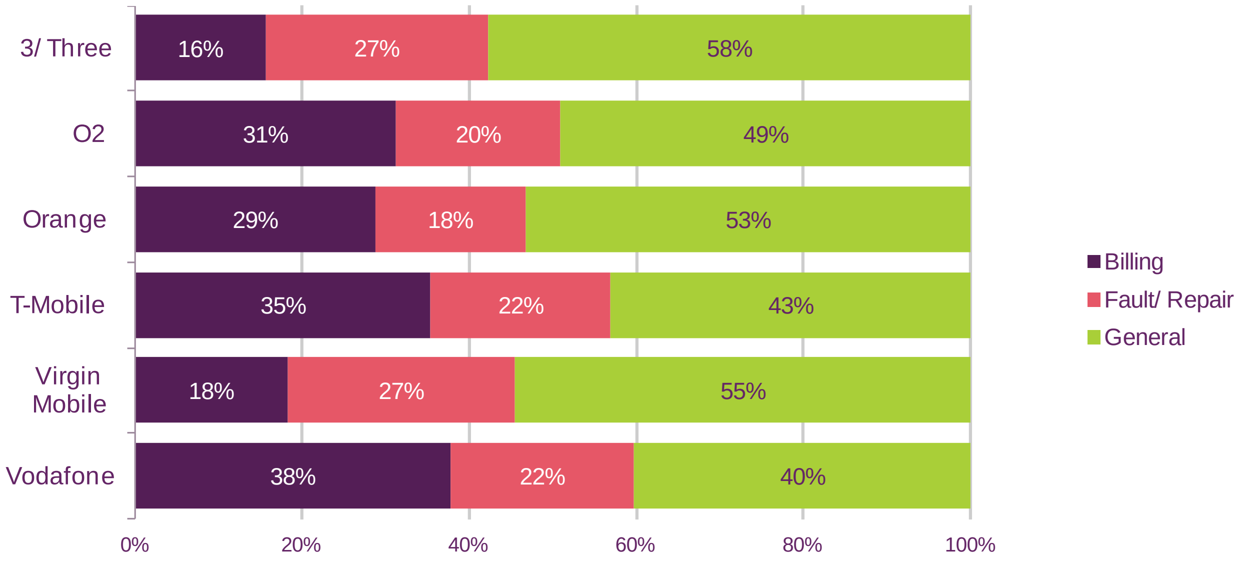
Type of call made most recently to mobile provider

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

General queries are most prevalent in the mobile sector; no provider had a significantly different profile to the average for the sector (average: billing 29%/ faults 21%/ general 49%). *NB low sample sizes for Three and Virgin Mobile.*

There has been no significant change in the proportions of types of contact to mobile network providers since a year ago, or compared with 2009.

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 network provider: 3/ Three 45*, O2 106, Orange 122, T-Mobile 65, Virgin Mobile 44*, Vodafone 77.

* indicates a base size lower than 50

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

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

Source: GfK Omnibus Survey

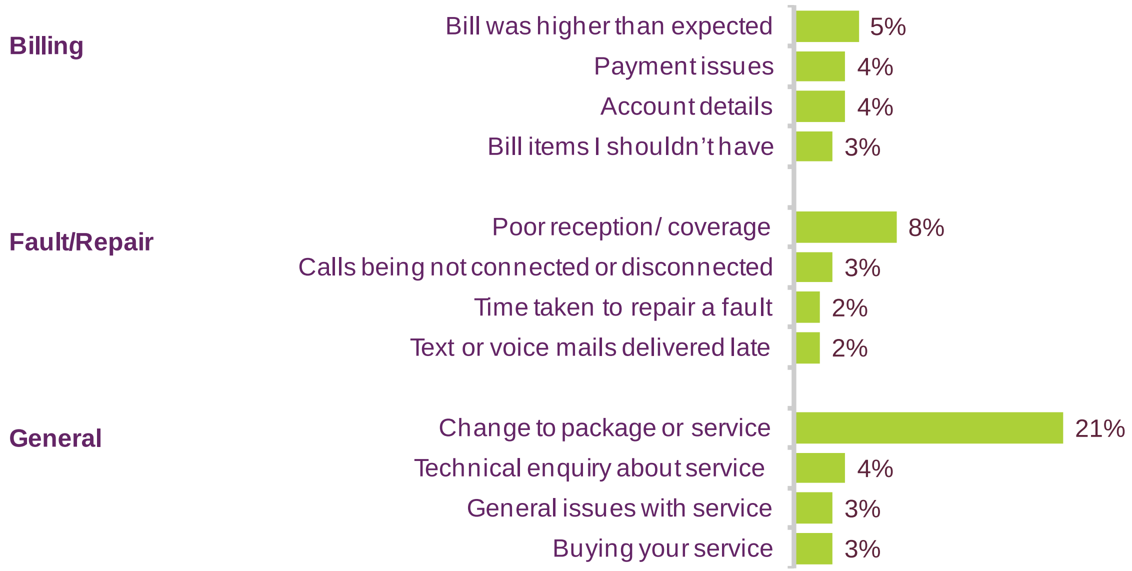
Key issues by contact type

Figure 4.4 (below) shows the most common specific reasons for recent contact with mobile phone network providers.

The main reason for recent customer contact continued to be to change package or service, with the next most common issue being poor reception or coverage.

There were no significant differences in reasons for contact compared with the same period last year, but since 2009 there has been an increase in the proportion of contacts regarding poor reception (up from 5% to 8%) and a decline in payment issues (down from 6% to 4%).

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 network provider: 2,192.

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

Source: Online survey

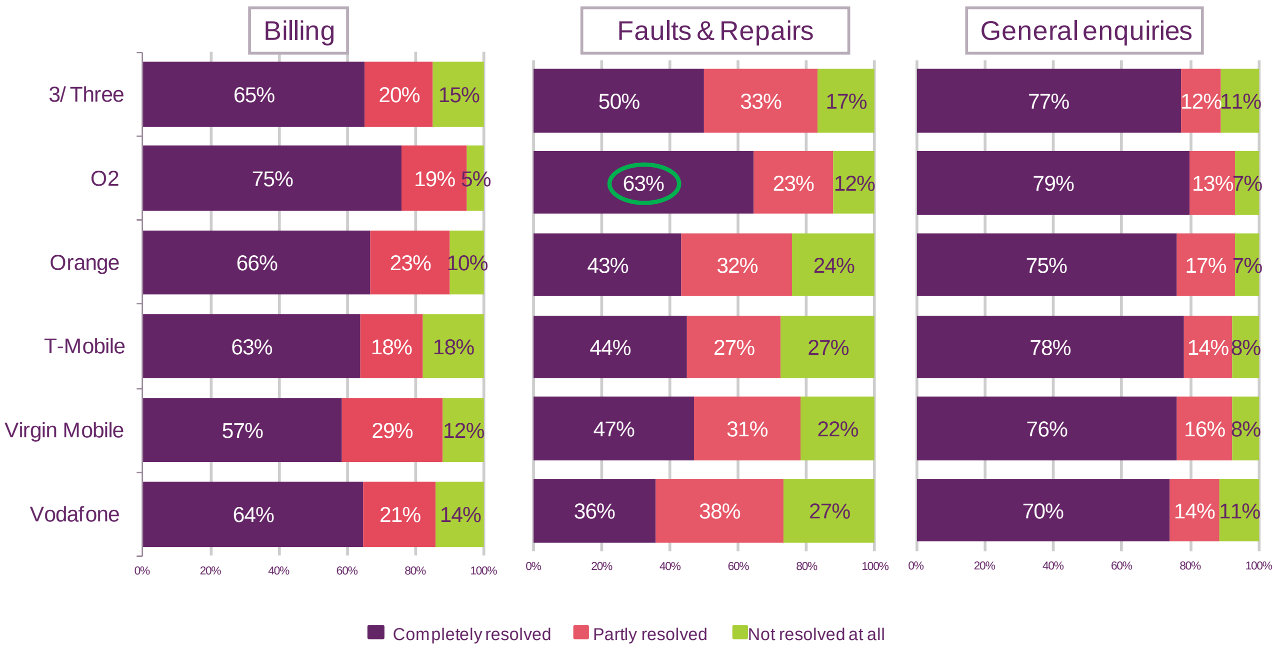
Issue resolution by mobile provider

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

As in September 2011, O2 was above average at fully resolving faults and repairs (63% vs 47% faults average). General issues, such as package changes, continued to have the highest claimed resolution rates (average 76% 'completely resolved', compared with 67% for billing and 47% for faults), while faults issues were more likely to be considered only partly resolved, or unresolved.

There have been no significant changes year-on-year, nor versus 2009.

Figure 4.5: Mobile – Whether issue considered by customer to have been resolved



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

Base: All UK households contacting mobile phone network provider [billing/fault/general enquiries]: 3/ Three 82/42*/100, O2 188/106/232, Orange 227/82/197, T-Mobile 120/41*/156, Virgin Mobile 101/32*/75, Vodafone 177/64/169.

* indicates a base size lower than 50

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

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

Source: Online survey

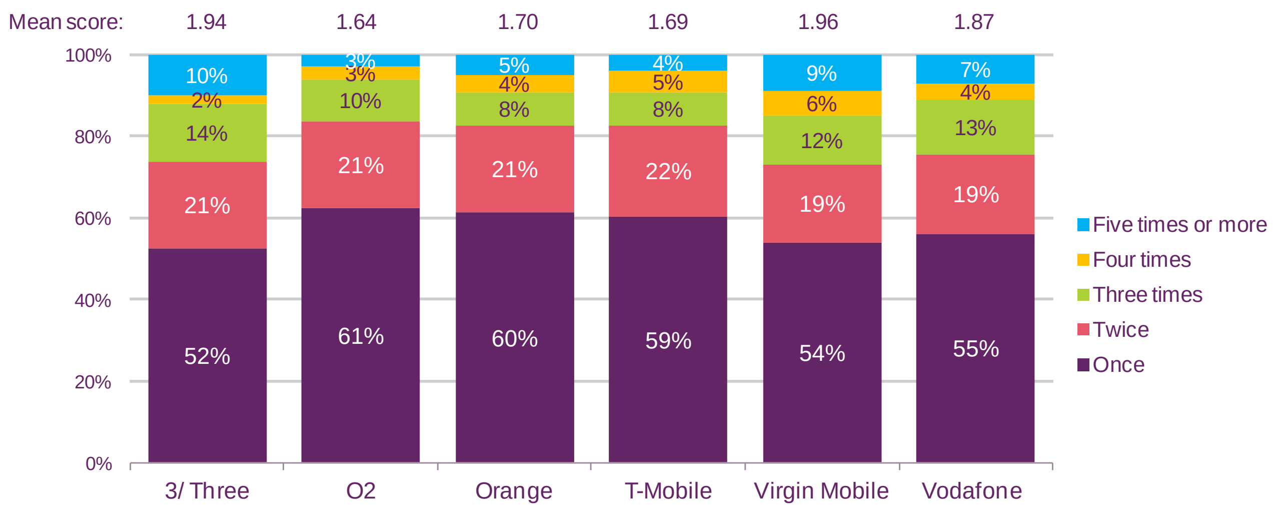
Number of contacts made with service provider

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

Mobile customers typically require fewer contacts with their network provider than landline and broadband customers (1.76 contacts on average), and over half are resolved in one contact (average 58%). No provider was notably different to the sector average in terms of the number of contacts required to resolve an issue.

The contact profiles have not changed significantly since last year, nor compared with 2009.

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 network provider: 3/ Three 224, O2 526, Orange 507, T-Mobile 317, Virgin Mobile 208, Vodafone 410.

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

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

Source: Online survey

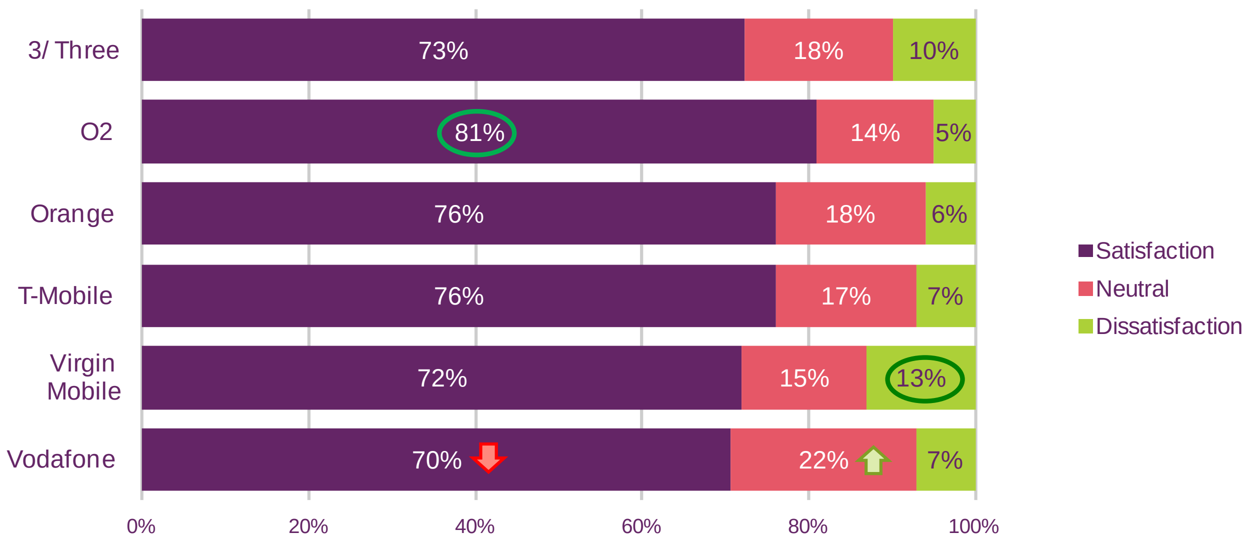
Overall satisfaction by provider

Figure 4.7 (below) shows levels of overall satisfaction with mobile phone network providers amongst customers who had contacted them in the last three months.

Satisfaction is typically higher than in the landline and broadband sectors. Satisfaction with Orange was above average for the sector (81% vs average 76%), as was dissatisfaction with Virgin (13% vs average 7%).

There has been a year-on-year decline in satisfaction with Vodafone (from 78% to 70%) and corresponding rise in neutral opinion, while satisfaction with Three has improved significantly over time since 2009 (from 59% to 73%).

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 network provider: 3/ Three 224, O2 526, Orange 507, T-Mobile 317, Virgin Mobile 208, Vodafone 410.

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

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

Source: Online survey

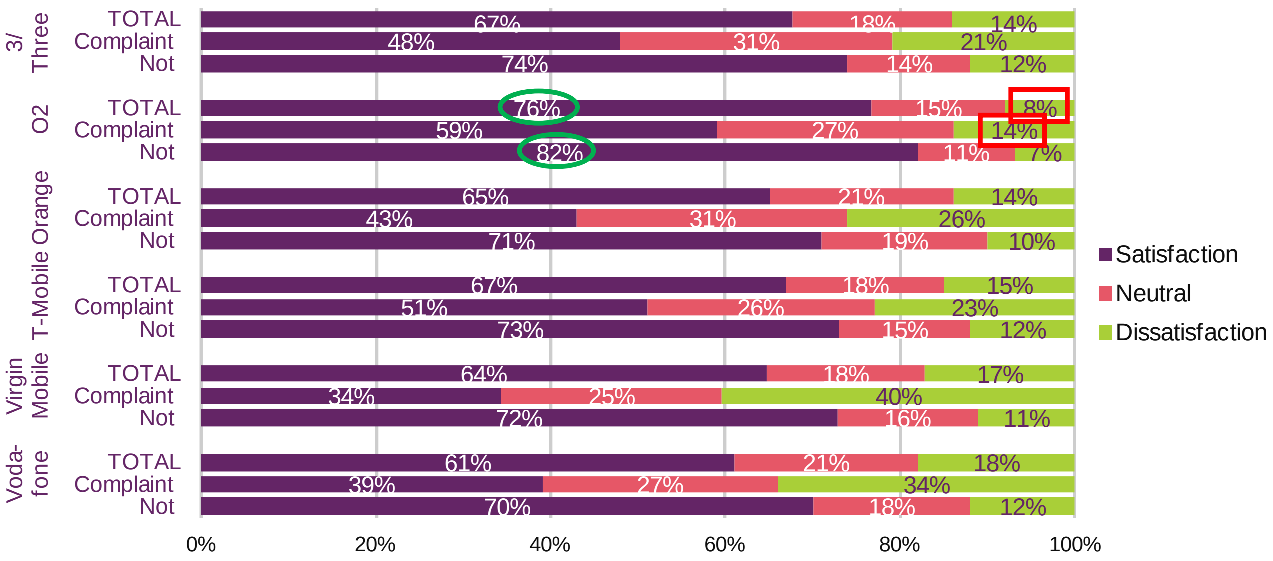
Overall satisfaction with customer service by provider

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

Satisfaction with O2 customer service was above average for the sector (76% vs 67% average), and dissatisfaction lower (8% vs 14% average). Average satisfaction with the handling of complaints was 47% and for non-complaints was 74%.

There were no significant changes in satisfaction levels either year-on-year or versus 2009.

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 network provider (Total/Complaint/Not): 3/ Three 224/57/167 O2 526/135/391, Orange 507/125/382, T-Mobile 317/80/237, Virgin Mobile 208/53/155, Vodafone 410/105/305.

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

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

Source: Online survey

Satisfaction with contacting customer service

Figure 4.9 (below) shows mean satisfaction scores on various aspects of contacting customer service.

Compared with average ratings for the sector, O2 was rated above average, and Virgin Mobile below average, on ease of getting through to the right person.

Since September 2011, Three's rating on ease of getting through has improved (from 7.0 to 7.6), while the rating for Orange on call backs has fallen (from 7.2 to 6.8).

There has been across-the-board improvement in ratings in this area relative to 2009 for Three, O2, Orange and Vodafone, specifically: ease of finding contact details (up from 7.5 Three, 7.5 O2, 7.0 Orange and 7.1 Vodafone), calling back (up from 6.5 Three, 6.6 O2, 6.2 Orange, 6.2 T-Mobile, 6.0 Vodafone), ease of getting through to the right person (up from 6.6 Three, 7.0 O2, 6.4 Orange, 6.4 Vodafone). Over the same period there has been a decline in satisfaction rating of getting through to the right person at Virgin Mobile (down from 7.1 to 6.5).

Figure 4.9: Mobile – Satisfaction with contacting customer service

	TOTAL	3/ Three	O2	Orange	T-Mobile	Virgin Mobile	Voda-fone
Ease of finding provider contact details	7.8	8.1	7.9	7.8	7.7	7.5	7.5
Calling you back when they said they would	7.0	7.1	7.4	6.8	7.2	6.6	7.0
Ease of getting through to the right person *(phone only)*	7.2	7.6	7.6	7.1	7.1	$\boxed{6.5}$	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 mobile phone network provider *(by phone)*: Total 2,192 *(1,841)*, 3/ Three 224 *(199)*, O2 526 *(400)*, Orange 507 *(465)*, T-Mobile 317 *(275)*, Virgin Mobile 208 *(179)*, Vodafone 410 *(323)*.

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

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

Source: Online survey

Satisfaction with speed of customer service

Figure 4.10 (below) shows mean satisfaction scores on various aspects to do with the speed of customer service.

O2 was rated above average on time taken to handle issues (7.6 vs average 7.2).

T-Mobile ratings have declined in this area year-on-year, with a drop on speed of answering (from 7.5 to 7.0) and time taken (from 7.6 to 7.1); the rating of Orange on time taken has also declined (from 7.6 to 7.1).

Compared with 2009 there has been across-the-board improvement for Three, O2 and Orange, specifically: speed of answering phones (up from 6.5 Three, 6.8 O2, 6.3 Orange, 6.5 Vodafone), time taken to handle issue (up from 6.3 Three, 7.0 O2, 6.6 Orange).

Figure 4.10: Mobile – Satisfaction with the speed of customer service

	TOTAL	3/ Three	O2	Orange	T-Mobile	Virgin Mobile	Voda-fone
Speed of answering phones *(phone only)*	7.1	7.4	7.4	7.0	7.0	6.7	7.2
The time taken to handle issue	7.2	7.0	7.6	7.1	7.1	7.0	6.9

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 network provider *(by phone)*: Total 2,192 *(1,841)*, 3/ Three 224 *(199)*, O2 526 *(400)*, Orange 507 *(465)*, T-Mobile 317 *(275)*, Virgin Mobile 208 *(179)*, Vodafone 410 *(323)*.

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

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

Source: Online survey

Satisfaction with customer service advice

Figure 4.11 (below) shows mean satisfaction scores for the standard of advice from customer service.

O2 was rated above average for the sector in terms of clear advice (7.8 vs 7.4 average) and issue resolution (7.5 vs 7.1 average), while Vodafone was rated below average on usefulness of advice (6.9 vs 7.2 average).

There have been no significant movements in this area since September 2011. However, as with other areas of customer service, there have been improvements on all attributes for Three, O2 and Orange since 2009, specifically: advice being easy to understand (up from 6.4 Three, 7.4 O2, 7.1 Orange), useful advice (up from 6.5 Three, 7.2 O2, 6.9 Orange), issue resolution (up from 6.3 Three, 7.1 O2, 6.8 Orange).

Figure 4.11: Mobile – Satisfaction with the standard of advice from customer service

	TOTAL	3/ Three	O2	Orange	T-Mobile	Virgin Mobile	Voda-fone
Advice/information was easy to understand	7.4	7.2	7.8	7.6	7.3	7.1	7.1
Advice/information was useful	7.2	7.1	7.6	7.4	7.1	7.0	6.9
Getting the issue resolved to your satisfaction	7.1	7.1	7.5	7.2	7.1	6.9	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 mobile phone network provider: Total 2,192, 3/ Three 224, O2 526, Orange 507, T-Mobile 317, Virgin Mobile 208, Vodafone 410.

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

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

Source: Online survey

Satisfaction with customer service adviser

Figure 4.12 (below) shows mean satisfaction with the customer service adviser.

O2 advisers were rated above average for the sector for understanding the problem (7.8 vs 7.5 average) and on logging details (7.5 vs 7.2 average), while Virgin was below average on logging details (6.6).

Since September 2011 there has been an improvement in logging details by Three (up from 6.8 to 7.4), and for Virgin on advisers doing what they said they would do (from 7.0 to 7.5), but a drop for Orange on this latter attribute (from 7.9 to 7.4).

Compared with 2009 there has been significant improvement for Three, O2 and Orange on nearly all of these aspects, specifically: courtesy (up from 7.3 Three, 7.7 O2, 7.5 Orange),understanding the issue (up from 7.4 O2, 7.0 Orange), taking questions seriously (up from 7.0 Three, 7.4 O2, 7.2 Orange), keeping the customer informed (up from 6.7 Three, 7.1 O2, 7.0 Orange), doing what they said (up from 6.7 Three, 7.3 O2, 7.0 Orange), logging details (up from 6.4 Three, 6.8 O2, 6.7 Orange). T-Mobile and Vodafone also improved their rating on logging details over this period (from 6.7 T-Mobile, 6.5 Vodafone), although Virgin's rating fell (up from 7.3 to 6.6).

Figure 4.12: Mobile – Satisfaction with the customer service adviser

	TOTAL	3/ Three	O2	Orange	T-Mobile	Virgin Mobile	Voda-fone
Courtesy and politeness of advisers	8.0	7.9	8.2	8.0	7.9	8.0	7.8
Adviser ability to understand the issue and identify the problem	7.5	7.1	7.8	7.6	7.5	7.2	7.1
Adviser took my questions/issue seriously	7.7	7.6	8.0	7.7	7.7	7.7	7.4
Keeping you informed throughout the process	7.4	7.5	7.8	7.4	7.5	7.3	7.1
Adviser doing what they say they would do	7.5	7.5	7.8	7.4	7.7	7.5	7.2
Logging of query details to avoid having to repeat yourself	7.2	7.4	7.5	7.2	7.2	6.6	6.9

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 network provider: Total 2,192, 3/ Three 224, O2 526, Orange 507, T-Mobile 317, Virgin Mobile 208, Vodafone 410.

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

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

Source: Online survey

Satisfaction with other aspects of customer service

Figure 4.13 (below) shows mean satisfaction scores for more general customer service attributes.

O2 was rated above average for the sector in terms of offering compensation (6.6 vs 6.1 average).

There have been no significant year-on-year rating changes on these attributes, although relative to 2009, O2 and Orange have improved; specifically: offering compensation (up from 5.6 O2, 5.2 Orange), willingness to help (up from 7.3 O2, 7.2 Orange). Vodafone has also improved its rating on offering compensation since 2009 (from 5.2 to 5.9).

Figure 4.13: Mobile – Satisfaction with other aspects of customer service

	TOTAL	3/ Three	O2	Orange	T-Mobile	Virgin Mobile	Voda-fone
Offering compensation or a goodwill payment	6.1	5.7	6.6	6.1	5.9	5.7	5.9
Willingness to help resolve your issue	7.5	7.3	7.8	7.6	7.5	7.3	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 mobile phone network provider: Total 2,192, 3/ Three 224, O2 526, Orange 507, T-Mobile 317, Virgin Mobile 208, Vodafone 410.

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

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

Source: Online survey

Future use of provider given customer service experience

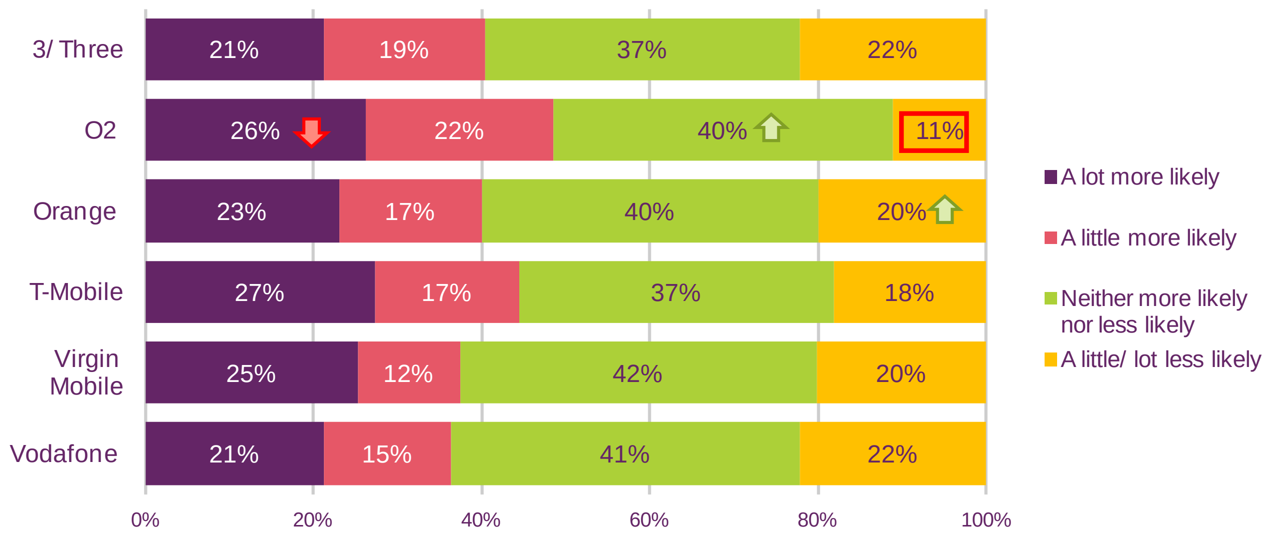
Figure 4.14 (below) shows the likelihood of using each mobile provider in the future, in light of the customer service experience during the most recent contact.

O2 customers were less likely than average to leave their provider (‘less likely to use’ 11% vs 18% average).

However, since September 2011 there has been some weakening of loyalty to O2, with a drop in ‘a lot more likely to use’ (from 34% to 26%). Loyalty to Orange has also fallen, with an increase in ‘less likely to use’ (from 14% to 20%).

Compared with 2009, loyalty has declined a little for Orange and Vodafone (‘a little more likely’ down from 24% to 17% for Orange, from 24% to 15% for Vodafone).

Figure 4.14: 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 network provider: 3/ Three 288, O2 632, Orange 566, T-Mobile 400, Virgin Mobile 274, Vodafone 520.

/ indicates significantly higher/ lower than average (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

- By far the main reason for contact in this sector is changing package or service. Other main reasons are to arrange an engineer's visit, or the time taken for repairs; billing issues are less common in this sector.
- The level of contact to Sky has reduced year-on-year. Virgin has a higher than average level of contacts for complaints.
- Issues are mostly resolved, although not always fully. Faults and repairs issues require more contacts while general queries need increasingly fewer. Sky has increased the proportion of issues resolved on first contact.
- Virgin Media's advisers are rated lower on keeping the customer informed and on offering compensation; there has been a year-on-year decline on the latter.
- Although there have been no year-on-year changes in overall satisfaction, this measure has improved for Sky since 2009, as have ratings of Sky advisers on all attributes. Dissatisfaction with Virgin's customer service has grown since 2009.

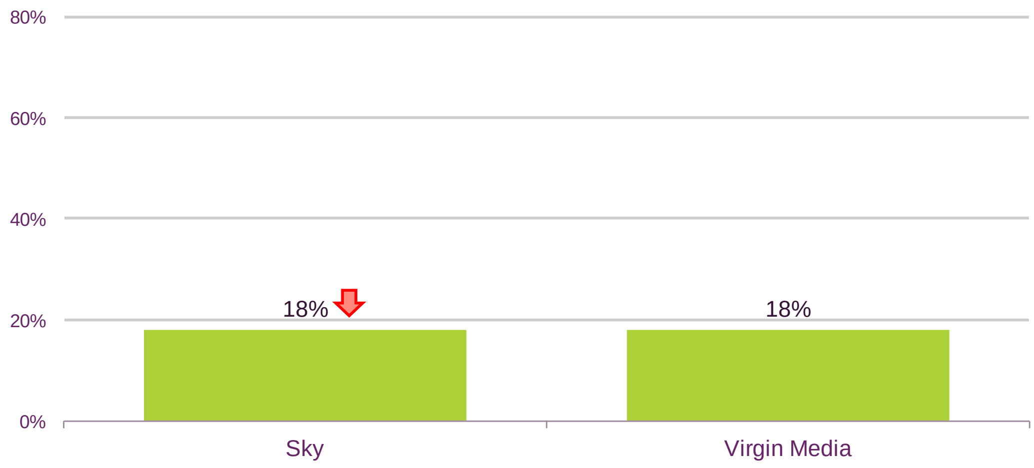
Recent contact with provider

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

Year-on-year, the proportion of customers who contacted Sky has fallen significantly (from 23% to 18%); this is also a significant drop versus 2009 (27% to 18%).

NB: there are also indications of reduction in contact levels to Virgin, but the changes are not significant due to lower base sizes.

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 899, Virgin Media 423.

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

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

Source: GfK Omnibus Survey

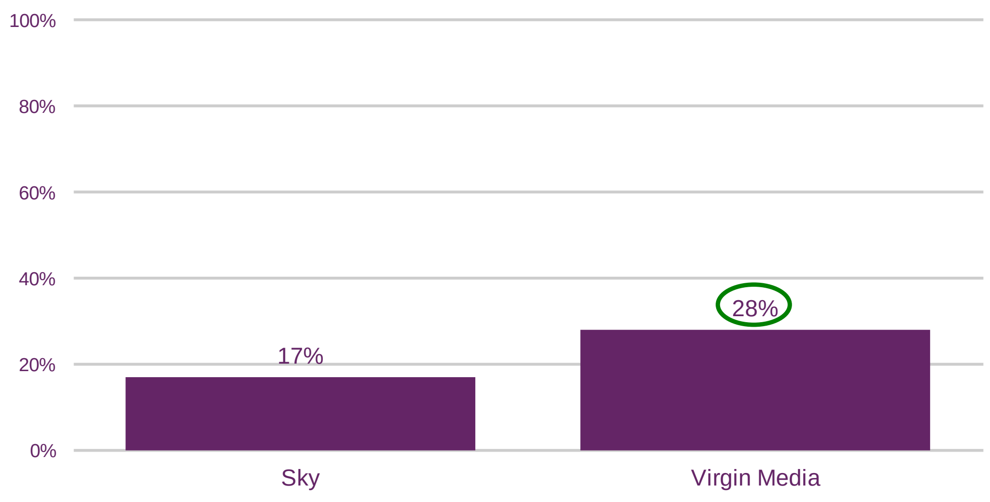
Proportion of complaints

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

Virgin's level of complaints was significantly higher than the average for the sector (28% vs 21% average).

There has been no significant year-on-year change in the level of complaints for Sky or Virgin.

Figure 5.2: Pay TV – Proportion of recent contacts that were complaints



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: Sky 790, Virgin Media 362.

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

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

Source: Online survey

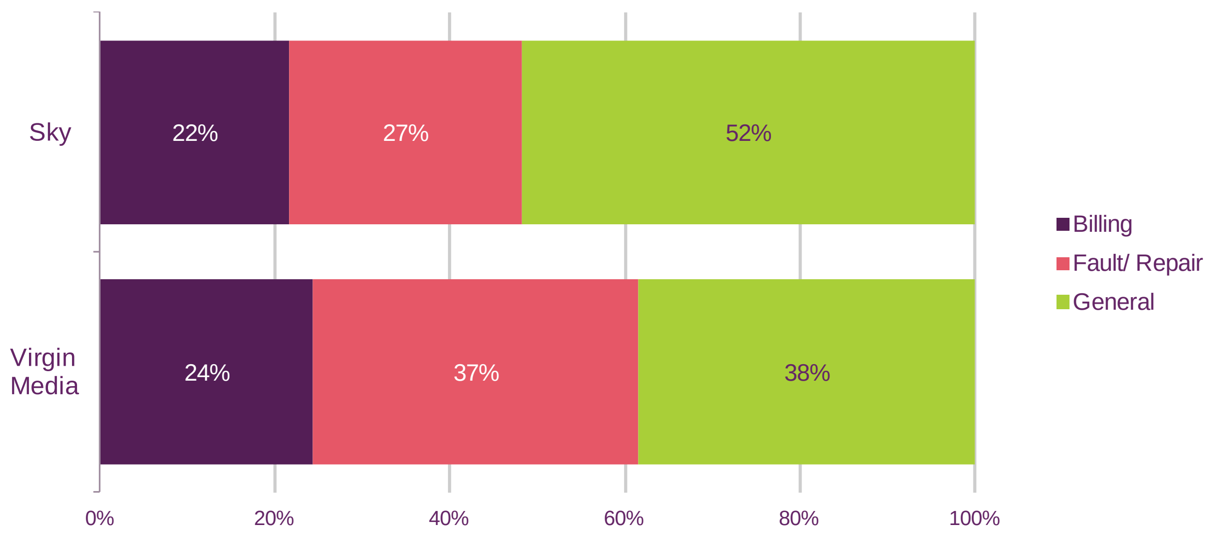
Type of call made most recently to service provider

Figure 5.3 (below) shows the types of contacts made to Pay TV providers.

Billing enquiries are less common than faults or general enquiries in the Pay TV sector. Neither provider had a profile significantly different to that of the sector average (average billing 23%, faults 30%, general 47%).

There have been no significant changes in contact type by provider compared with 2011 or 2009 findings.

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 162, Virgin Media 78.

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

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

Source: GfK Omnibus Survey

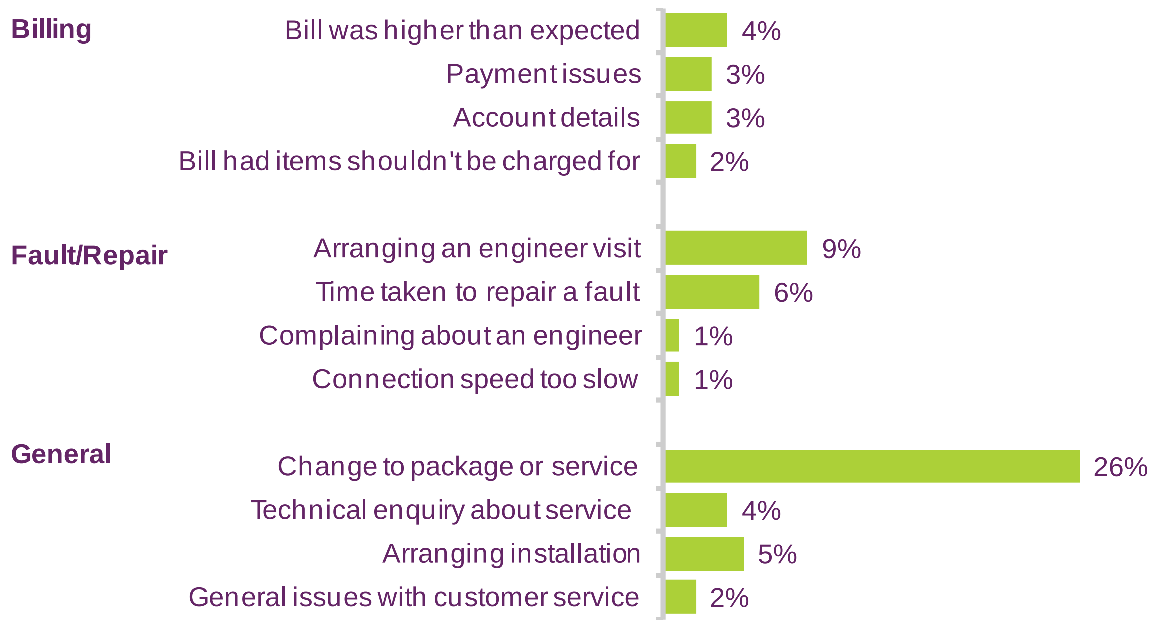
Key issues by contact type

Figure 5.4 (below) shows the most common specific reasons for recent contact with Pay TV service providers.

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.

There have been no significant changes in reasons for contact either year-on-year or versus 2009.

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: 1,152.

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

Source: Online survey

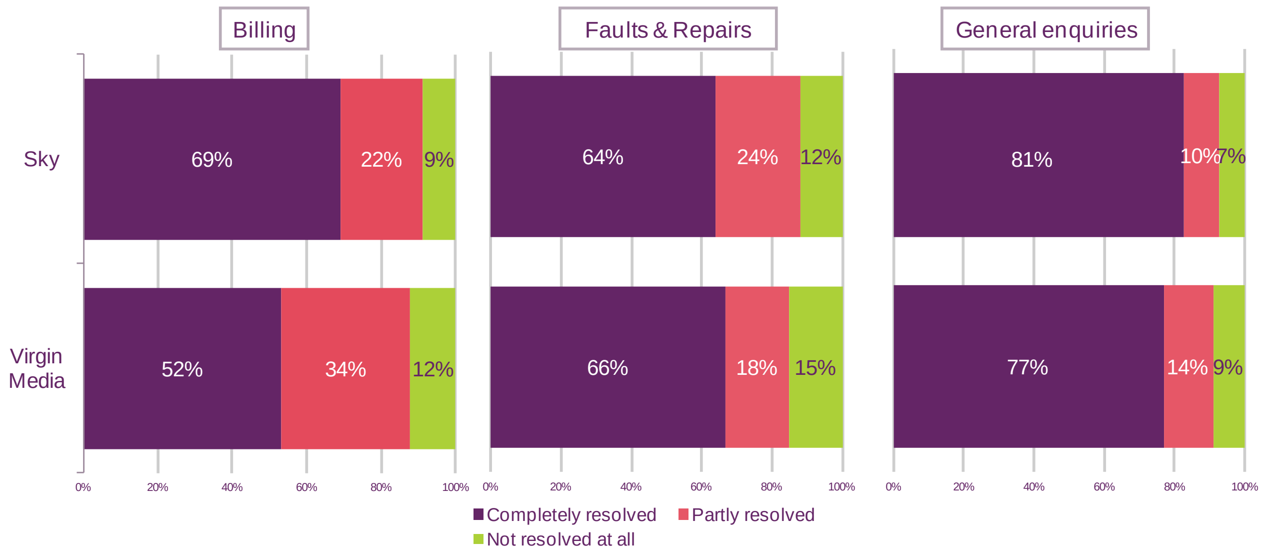
Issue resolution by service provider

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

General issues were typically considered to be better resolved than billing or faults issues. Neither provider was significantly different from the sector averages (average 'completely resolved': billing 63%/ faults 65%/ general 80%) in terms of resolution by issue type.

There were no significant changes in issue resolution versus 2011 or 2009.

Figure 5.5: Pay TV – Whether issue considered by customer to have been 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 271/182/337, Virgin Media 102/161/99.

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

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

Source: Online survey

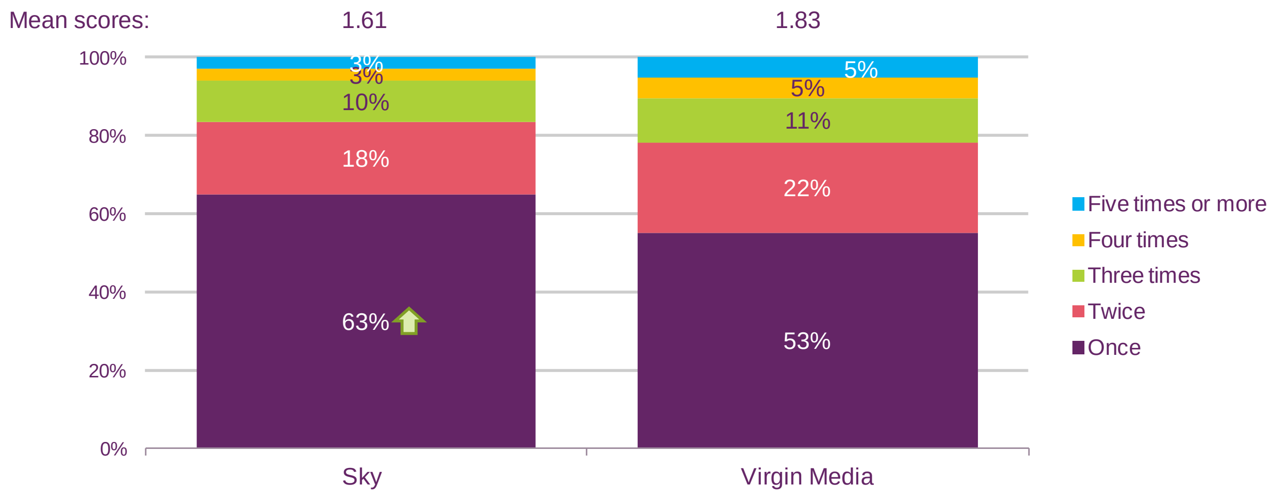
Number of contacts made with service provider

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

Neither provider was different from the sector average (mean 1.68 contacts) in terms of number of contacts per issue.

Since September 2011, the number of Sky customers who have had their issues resolved in the first contact has increased (from 57% to 63%). Compared with 2009, the mean number of required contacts to Sky has fallen (from 1.78 to 1.61), as has the proportion of customers contacting five or more times about an issue (from 6% to 3%).

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 790, Virgin Media 362.

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

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

Source: Online survey

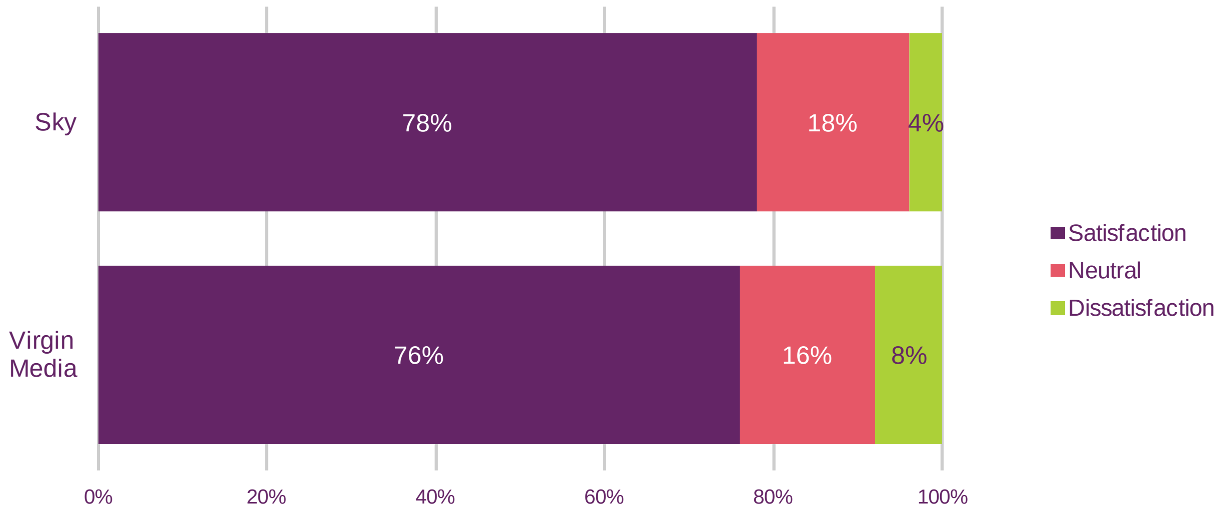
Overall satisfaction by provider

Figure 5.7 (below) shows levels of overall satisfaction with Pay TV providers amongst customers who had contacted them in the last three months.

There was no difference in overall satisfaction for either provider versus the average for the sector (average satisfaction 77%).

There has been no significant year-on-year change in overall satisfaction levels, but satisfaction with Sky remains higher than in 2009 (up from 72% to 78%).

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 790, Virgin Media 362.

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

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

Source: Online survey

Overall satisfaction with customer service by provider

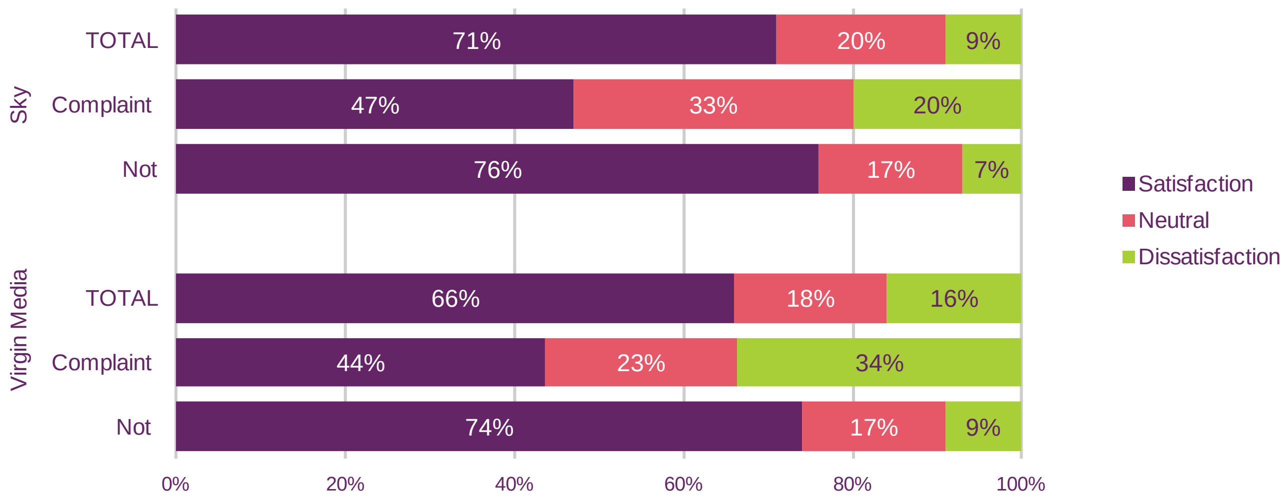
Figure 5.8 (below) shows levels of satisfaction with the customer service from Pay TV providers.

Overall, neither provider had satisfaction levels above or below average for the sector (average 69% satisfaction/ 11% dissatisfaction).

As seen in other sectors, satisfaction was lower when the contact was considered to be a complaint. Average satisfaction/dissatisfaction with customer service for complaints was 46%/26%, and for non-complaints 76%/7%.

There have been no significant changes since September 2011, but dissatisfaction with Virgin Media remains higher than in 2009 (up from 10% to 16%).

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 (Total/Complaint/Not): Sky 790/149/641, Virgin Media 362/113/249.

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

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

Source: Online survey

Satisfaction with contacting customer service

Figure 5.9 (below) shows mean satisfaction scores on various aspects of contacting customer service.

Neither provider was significantly different from average on any attribute.

There have been no significant movements year-on-year, but compared with 2009 ratings have generally improved; specifically on ease of finding contact details (Sky up from 6.6 to 7.5), calling back (up from 5.9 Sky, 6.1 Virgin) and ease of getting through to the right person (from 6.0 Sky, 6.6 Virgin).

Figure 5.9: Pay TV – Satisfaction with contacting customer service

	TOTAL	Sky	Virgin Media
Ease of finding provider contact details	7.6	7.5	7.8
Calling you back when they said they would	7.0	7.2	6.6
Ease of getting through to the right person *(phone only)*	7.2	7.3	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 *(by phone)*: Total 1,152 *(1,022),* Sky 790 *(686)*, Virgin Media 362 *(336)*.

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

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

Source: Online survey

Satisfaction with speed of customer service

Figure 5.10 (below) shows mean satisfaction scores on various aspects to do with the speed of customer service.

Neither provider was rated significantly different to the sector average on either attribute.

Since September 2011 Sky's rating on speed of answering phones has increased (from 6.9 to 7.2). Compared with 2009 ratings are generally higher, specifically: speed of answering phones (from 5.9 to 7.2 Sky, 6.3 to 6.9 Virgin), time taken to handle issue (Sky up from 6.4 to 7.3).

Figure 5.10: Pay TV – Satisfaction with the speed of customer service

	TOTAL	Sky	Virgin Media
Speed of answering phones *(phone only)*	7.1	7.2 ⇧	6.9
The time taken to handle issue	7.2	7.3	6.9

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)*: Total 1,152 *(1,022),* Sky 790 *(686)*, Virgin Media 362 *(336)*.

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

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

Source: Online survey

Satisfaction with customer service advice

Figure 5.11 (below) shows mean satisfaction scores for the standard of advice from customer service.

Neither provider was rated above or below average for the sector on any of these attributes.

There have been no significant year-on-year changes, but since 2009 Sky has improved all its ratings on all attributes in this area, specifically: advice being easy to understand (from 6.9 to 7.7) and useful (from 6.7 to 7.5) and satisfactory issue resolution (from 6.7 to 7.4).

Figure 5.11: Pay TV - Satisfaction with the standard of advice from customer service

	TOTAL	Sky	Virgin Media
Advice/ information was easy to understand	7.6	7.7	7.2
Advice/ information was useful	7.3	7.5	7.0
Getting the issue resolved to your satisfaction	7.3	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: Total 1,152, Sky 790, Virgin Media 362.

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

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

Source: Online survey

Satisfaction with customer service adviser

Figure 5.12 (below) shows mean satisfaction with the customer service adviser.

Virgin Media advisers were rated significantly below average for the sector in terms of keeping the customer informed (7.0 vs 7.4 average).

There were no notable changes year-on-year, but once again 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).

Figure 5.12: Pay TV – Satisfaction with the customer service adviser

	TOTAL	Sky	Virgin Media
Courtesy and politeness of advisers	8.1	8.2	7.8
Adviser ability to understand the issue and identify the problem	7.5	7.7	7.1
Adviser took my questions/issue seriously	7.7	7.9	7.4
Keeping you informed throughout the process	7.4	7.7	$\boxed{7.0}$
Adviser doing what they say they would do	7.6	7.8	7.3
Logging of query details to avoid having to repeat yourself	7.2	7.4	6.9

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: Total 1,152, Sky 790, Virgin Media 362.

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

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

Source: Online survey

Satisfaction with other aspects of customer service

Figure 5.13 (below) shows mean satisfaction scores for more general customer service attributes.

Virgin Media was rated significantly below average for the sector on offering compensation (5.2 vs average 5.9).

Compared with a year ago, Virgin's rating on offering compensation has declined (from 5.6 to 5.2). Sky's rating on both attributes is higher than in 2009, specifically on offering compensation (up from 5.0), willingness to help (from 6.9).

Figure 5.13: Pay TV – Satisfaction with other aspects of customer service

	TOTAL	Sky	Virgin Media
Offering compensation or a goodwill payment	5.9	6.2	5.2
Willingness to help resolve your issue	7.6	7.7	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 Pay TV provider: Total 1,152, Sky 790, Virgin Media 362.

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

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

Source: Online survey

Future use of provider given customer service experience

Figure 5.14 (below) shows the likelihood of using each mobile provider in the future, in light of the customer service experience during the most recent contact.

Virgin customers were less likely to stay with their provider, compared with the sector average (23% 'less likely' vs 17% average).

While there have been no significant year-on-year changes in loyalty, there has been a drop 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 13%) and an increase in those less likely to use Virgin again (from 14% to 23%).

Figure 5.14: 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 790, Virgin Media 362.

/ indicates significantly higher/ lower than average (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 - ASK ONLY ONCE FOR EACH PROVIDER

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.

1. Landline telephone calls
2. Broadband internet
3. Cable/ Satellite TV
4. Mobile phone services (not including mobile broadband)

ASK FOR ALL PROVIDERS CONTACTED/ 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?

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/ SINGLE CODE

S7 (A-C) And more specifically, which of the following best describes what the issue with [PROVIDER] was concerning?

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/ 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?

ASK ALL – ONLY ONCE PER PROVIDER CONTACTED/ 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/ 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?

ASK ALL – ONLY ONCE PER PROVIDER CONTACTED/ 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.

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

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/ 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/ 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/ 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/ 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/ 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 ELIGIBLE MOBILE NETWORK AT S3D / SINGLE CODE

CL1 Is your personal mobile phone on a contract or pay as you go?

1. Contract (with monthly bills)
2. Pay as you go
3. Don't know

ASK ALL / SINGLE CODE

CL2 What is your current employment status?

1. Employed or self-employed (full-time)
2. Employed or self-employed (part-time)
3. Homemaker
4. Student / under education
5. Temporarily not working (unemployed / illness)
6. Retired

ASK ALL / SINGLE CODE

CL3 Approximately, what is your total annual income before tax?

1. Under £5,000
2. £5,000 to £9,999
3. £10,000 to £19,999
4. £20,000 to £29,999
5. £30,000 to £39,999
6. £40,000 to £49,999
7. £50,000 to £59,999
8. £60,000 or more
9. Don’t know
10. Would rather not say

ASK ALL / SINGLE CODE

CL4 Where do you live?

1. East Midlands
2. Eastern
3. London
4. North East
5. North West
6. Scotland
7. South East
8. South West
9. Ulster / Northern Ireland
10. Wales
11. West Midlands
12. Yorks & Humber

ASK ALL / MULTI-CODE

CL5 And finally, which of these, if any, limit your daily activities or the work you can do?

Please select all that apply

1. Breathlessness or chest pains
2. Poor vision, partial sight or blindness
3. Difficulty in speaking or in communicating
4. Poor hearing, partial hearing or deafness
5. Cannot walk at all / use a wheelchair
6. Cannot walk far or manage stairs or can only do so with difficulty
7. Limited ability to reach
8. Mental health problems or difficulties
9. Dyslexia
10. Other illnesses or health problems which limit your daily activities or the work that you can do (specify)
11. None
12. Don’t know
13. Would rather not say

Appendix 2: Omnibus 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. BT Vision
4. Don't have pay TV
5. Other

DK. Don't Know

ASK FOR ALL COMPANIES CODED AT Q.1/2/3/4 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?

1. Yes
2. No
3. DK

ASK FOR [BT, VIRGIN, TALKTALK, SKY, ORANGE] IF USE PROVIDER FOR MORE THAN ONE SERVICE:
MULTICODE

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 FOR ALL COMPANIES CODED AT Q.1/2/3/4 BUT ONLY ASK EACH COMPANY ONCE IF USED FOR MORE THAN ONE PRODUCT:
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	Sept 2012
Gender	Male	48%	38%	39%	34%
	Female	52%	62%	61%	66%
Age	18-24	15%	12%	14%	11%
	25-34	26%	23%	27%	23%
	35-44	22%	23%	22%	21%
	45-54	17%	18%	17%	19%
	55-64	11%	16%	14%	19%
	65+	9%	9%	6%	7%
Working Status	Full time	52%	49%	50%	44%
	Part time	15%	17%	16%	19%
	Other	33%	34%	34%	37%
Region (GOR)	East Midlands	8%	7%	8%	7%
	Eastern	5%	6%	6%	7%
	London	13%	11%	13%	10%
	North East	6%	5%	5%	5%
	North West	11%	12%	12%	12%
	Scotland	11%	8%	8%	8%
	South East	17%	18%	16%	17%
	South West	7%	9%	9%	8%
	Ulster / Northern Ireland	2%	1%	2%	2%
	Wales	4%	5%	4%	5%
	West Midlands	8%	9%	8%	9%
	Yorks & Humber	8%	9%	9%	9%