Quality of Customer Service report

Saville Rossiter-Base

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Contents

Section 1

Introduction

Background

Ofcom (Office of Communications) is the regulator for the UK communications industries, with responsibilities across television, radio, telecommunications and wireless communications services. 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 in relation to communications matters and to further the interests of consumers in relevant markets, where appropriate, by promoting competition.

Under section 14 of the Act, it is Ofcom's duty to make arrangements for ascertaining:

- s.14(1)(a) - the state of public opinion from time to time about the manner in which electronic communications networks and electronic communications services are provided;
- s.14(1)(c) - the experiences of consumers in the markets for electronic communications services in relation to the manner in which electronic communications networks and electronic communications services are made available; and
- s.14(1)(d) – the experiences of such consumers in relation to the handling, by communications providers, of complaints made to them by such consumers.

The Act allows Ofcom to commission third parties to carry out research on its behalf (subsection (7)) and, 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).

Since 2009 Ofcom has conducted research to quantify levels of satisfaction with providers' customer service, among the main communications providers in the UK (defined as those providers with a market share of 4% or more within a sector). This research enables Ofcom to monitor the customer service experience, understand whether this varies by the type of issue being dealt with, and to evaluate changes over time by market and provider.

This report shows the results of the fifth wave of the research concerning the quality of customer services offered to customers of fixed line, fixed broadband, mobile and pay TV providers.

As with the previous waves of this research, this report details consumers' views based on their most recent contact with their provider within the three months prior to the interview. For this latest wave (with interviewing conducted in October 2013) the period relating to customer service experience is approximately July to September 2013.

Reports from the previous four waves of the research are available from Ofcom's website[1].

[1]http: //stakeholders.ofcom.org.uk/binaries/consultations/topcomm/annexes/qos-report.pdf
http: //stakeholders.ofcom.org.uk/binaries/research/telecoms-research/Quality-of-customer-service.pdf
http: //stakeholders.ofcom.org.uk/binaries/research/telecoms-research/customer-service/Customer_Service_Satisfacti1.pdf
http: //stakeholders.ofcom.org.uk/binaries/research/telecoms-research/customer-satisfaction.pdf

Research methodology and analysis

The methodology used for this fifth wave of the research matches that used for the previous four waves; with research conducted across two stages, as follows:

Stage 1

- 3,007 interviews undertaken across three weeks of a nationally representative telephone omnibus survey in order to provide a profile of the incidence of recent (last 3 months) contact (by phone or email) with communications providers in each sector, and the types of issues (Billing, Fault/ Repair, General) that consumers contact their providers about.
- This profile of contact incidence and the type of issues raised was used to weight the Stage 2 (online) data for each provider within each sector (fixed line, broadband, mobile, pay TV)[2]. This weighting is applied to reflect the incidence of contact and the issue that the contact related to for each provider in each sector at each wave of the research.

Stage 2

- An online panel survey was used to interview customers who had made contact with their provider/s in the three months prior to the interview by phone or email. Minimum targets were set for each provider in each sector; with between 1,100 and 2,000 customer service experiences targeted per sector.
- In the event that a respondent took multiple services from the same provider and had contacted that provider to discuss both/ all of these services, they answered all relevant sections of the questionnaire.
- A total of 6,112 customer experiences were covered in detail across the four sectors through the online panel research.

Copies of the questionnaires used at Stage 1 and Stage 2 are shown at the back of this report

Within this report, differences between the 2013 and 2012 research findings, and any differences between an individual provider and the sector average are only reported when they are statistically significant. Significance testing at the 99% confidence level was carried out. This means that where findings are commented on in the report, there is only a 1% or less probability that the difference between the samples is by chance. Statistically significant findings are indicated by arrows and by text within each of the Figures throughout the report.

[2] Contact from Orange broadband customers was not weighted at Stage 2 because of the low volume of interviews conducted for this provider at Stage 1, driven by the combination of market share and incidence of customers making contact in the specified three month period.

Section 2

Executive summary

Overview of sectors

- **Around a quarter (25%-27%) of consumers in each of the broadband, mobile and pay TV markets had contacted their provider** in a three month period in 2013[3]. Contact with landline providers was lower; at 16%. Contact relating to general issues accounted for between 40%-50% of contacts in the landline, mobile and pay TV markets. In the broadband market, contact was as likely to relate to a fault/ repair issue (38%) as a general issue (38%).

- **At least a quarter of consumers in each market, who had contacted their provider in the three month period in 2013, said this contact was a complaint**. One-third of customer contacts to broadband providers were complaints, up from 29% in the same period in 2012. In the fixed line market 31% of customer contacts were complaints, compared to 26% in each of the mobile and pay TV markets. Since 2012, the pay TV market has also experienced a rise in the proportion of complaints; up from 21%.

- **The majority (66% to 77%) of customers making contact were satisfied with the customer service they received from their provider, but satisfaction is lower among those making a complaint**. Compared to the same period in 2012, satisfaction with the customer service received has increased for both mobile (75% vs. 67%) and pay TV (77% vs. 69%). Satisfaction remains at two-thirds for landline (66%) and broadband (66%). Satisfaction among those contacting their provider with a complaint is lower than these sector averages; ranging from 50% (landline) to 62% (pay TV).

- **Broadband providers are the least likely to resolve contacts in a single contact from the customer**. Around three-fifths (59%) of resolved contacts in the broadband market were dealt with in a single contact from the customer. This compares to 65% in the landline market and 70% in each of the mobile and pay TV markets.

Landline

- **There has been an increase in overall contact to any landline provider** (16% vs. 12% in 2012), taking contact levels back to those reported between 2009 and 2011. This increase in 2013 is attributable to BT customers being more likely to make contact (16% vs. 10% in 2012). The proportion of contacts considered to be complaints has increased since 2012 for BT landline customers (31% vs. 22%).

- **Virgin Media customers are more likely to be satisfied with the customer service received compared to the landline sector average**. Three-quarters (74%) of Virgin Media customers were satisfied with the customer service received, compared to the sector average of two-thirds (66%). Other landline providers reported levels of satisfaction with customer service that were comparable with the sector average.

- **Since 2012 there have been few changes in satisfaction with aspects of the customer service experience in the landline market**. The exceptions to this are improvements for Virgin

[3] This period relates to the three months prior to interview i.e. between July and September 2013

Media relating to the courtesy of advisors, keeping consumers informed of progress and logging details accurately, and an improvement for BT on ‘offering goodwill payments’.

- **Sky (69%) and Virgin Media (67%) report higher than average satisfaction for the ease of getting through to the right person**. The average reported satisfaction was 58%.

Broadband

- **There has been an increase in overall contact to any broadband provider** (26% vs. 17% in 2012), with this increase attributable to three providers: Orange (32% vs. 8% in 2012), BT (30% vs. 15% in 2012) and Sky (22% vs. 12% in 2012).

- **There has been an increase in complaints among those making contact with their broadband provider** (34% vs. 29% in 2012), with this increase attributable to TalkTalk customers being more likely to have made contact with a complaint (38% vs. 27% in 2012). However, no single provider reports complaints levels that are significantly higher or lower than the sector average in 2013 (34%).

- **Fault/ repairs contacts are more common in the broadband market than in other markets**. Slow broadband connection speed is the most common reason for making contact with the broadband provider (16%). This is followed by making a change to the package or service (12%), with around one in twenty (5%) or fewer customers making contact for any other reason.

- **Virgin Media customers are more likely to say that their fault/ repair issue had been resolved than the broadband sector average** (66% vs. 54%). Across the sector, 59% of contacts (not necessarily complaints) were resolved with a single contact. This overall proportion does not vary by provider and has not changed significantly since 2012, for any provider or for the sector overall.

- **Satisfaction with customer service is unchanged since 2012 for the broadband sector (at 66%), but has increased among those making contact with a complaint** (51% vs. 43%). This increase in satisfaction among those making a complaint is attributable to an increase among Sky customers (55% vs. 37% in 2012). No provider in the broadband sector reported satisfaction levels higher or lower than the sector average, for any type of contact or for complaints handling.

- **Virgin Media improved on most aspects of customer service since 2012 (12 out of 16)**. Ratings for Virgin Media rose by at least 10 percentage points for each of the following aspects: ‘calling back when promised’, ‘providing useful advice/ information’, ‘ability to understand the issue/ identify the problem’ and keeping informed of progress’. This improvement has taken Virgin Media above average for the sector on ‘ease of getting through’, ‘time taken to handle issue’, ‘ability to understand the issue’ and ‘offering goodwill payments’.

- **Sky reported higher than average satisfaction for a number of aspects of customer service in 2013.** While the ratings for Sky are mostly unchanged since 2012, satisfaction was above the sector average in 2013 for ‘advice being easy to understand’, ‘ability to understand the problem’, ‘keeping people informed’, doing what they promised’ and ‘offering goodwill payments’. There were two incidences of lower than average scores in this sector: TalkTalk for ‘logging details’ and BT for ‘offering goodwill payments’.

Mobile

- **There has been an increase in overall contact to any mobile network provider** (27% vs. 20% in 2012), with this increase attributable to an increase for two providers: 3/Three (36% vs. 23% in 2012) and Orange (28% vs. 18% in 2012).

- **Mobile customers are more likely than in 2012 to be satisfied with the customer service received** (75% vs. 67% in 2012). This overall increase is driven by an increase among Vodafone customers (77% vs. 61% in 2012). However, O2 was the only provider to report higher than average satisfaction with customer service in 2013 (81%) and Orange was the only provider to report lower than average satisfaction (67%).

- **Mobile customers making contact with a complaint are more likely than in 2012 to say they are satisfied** (57% vs. 47% in 2012), and again this increase is attributable to an increase among Vodafone customers (66% vs. 39% in 2012). No single provider in the mobile sector reported satisfaction levels higher or lower than the sector average for complaints handling.

- **Improvement since 2012 was noted across the mobile sector for 9 of the 16 aspects of customer service**. The aspect with the greatest improvement was 'calling back when promised', which rose by 9 percentage points, with improvements for this aspect noted for O2, Orange, T-Mobile and Vodafone.

- **Orange is the only mobile provider to report lower than average satisfaction with various aspects of customer service**; in particular 'speed of answering phones' (53%) and 'ease of getting through' (56%) both of which were at least 9 percentage points below the sector average (64% and 65% respectively). T-Mobile is an EE mobile brand along with Orange. T-Mobile's performance matched the sector average for each aspect of customer service.

Pay TV

- **There has been an increase in overall contact to any pay TV provider** (25% vs. 18% in 2012), taking contact levels back to those reported between 2009 and 2011. Sky customers are more likely to have made contact than in the same period in 2012 (26% vs. 18%).

- **There has been an increase in complaints among those making contact with their pay TV provider** (26% vs. 21% in 2012). BT TV was the only provider reporting higher than average levels of complaints in this sector (40% vs. 26% for the sector average).

- **Pay TV providers are more likely to resolve general enquiries** (83%) than they are to resolve either billing or fault/ repair issues (both 66%).

- **Pay TV customers are more likely than in 2012 to be satisfied with the customer service received generally and specifically with complaints handling**. Overall satisfaction with customer service rose to 77% (from 69%) and to 62% (from 46%) for complaints. Sky and Virgin Media have driven the overall improvement; with satisfaction reported respectively at 80% and 77% overall and at 69% and 61% for complaints.

- **BT TV is the only provider with below average satisfaction for various aspects of customer service.** The scores for BT TV were at least 14 percentage points lower than average on each of the following: 'ease of getting through', 'time taken to handle issue', 'advice easy to understand', the advisors ability to 'understand the issue', 'take issue seriously', 'keep them informed' and 'do what they promise'.

Section 3

Overview of Sectors

This section compares the different sectors (landline, broadband, mobile and pay TV) in terms of incidence of contact, whether the recent contact was a complaint or not, how the contact was made, what type of issue the contact related to, whether the issue was considered to be resolved, satisfaction with the customer service experience, and interest in service rating information.

Comparisons are also made, where possible, between the findings for each service sector from the 2013 research, and the previous wave of research conducted in 2012

Detailed findings for each particular sector are covered in Sections 4 to 7 within this report.

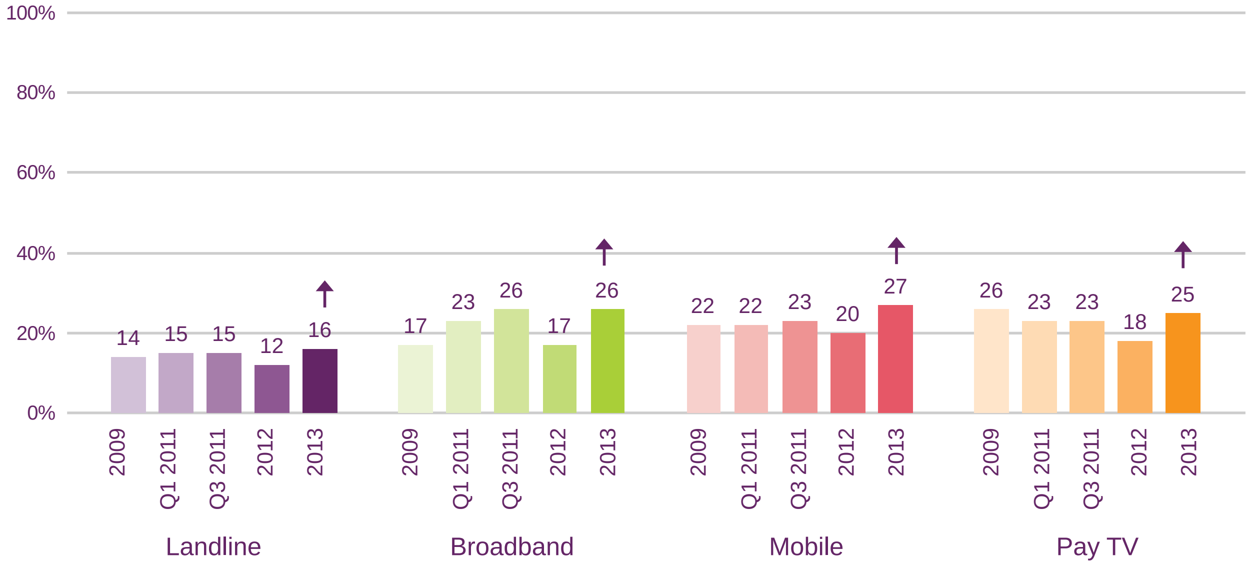
Recent contact with provider

Contact with landline, broadband, mobile and pay TV providers has increased since 2012

Figure 1 shows the proportion of customers who had made contact with their communications service provider by phone or email in the three months prior to the interview[4]. Compared to a similar period in 2012, the incidence of contact has increased for landline (16% vs. 12%), broadband (26% vs. 17%), mobile (27% vs. 20%) and for pay TV (25% vs. 18%). The incidence of contact with the provider in the three months prior to the interview in 2013 is back to similar levels to those found in Q3 2011, following a decline in the 2012 survey for landline, broadband and pay TV. While the incidence of contact has also increased for mobile in 2013, there was no decline for mobile between Q3 2011 and 2012.

[4]With the data for this measure coming from the omnibus study, this means that the contact was between May and July 2013

Figure 1: Proportion of customers who had contacted provider in the three months prior to the interview, by service type: 2009, 2011, 2012 and 2013



Q6. Thinking of [PROVIDER] and the services you buy from them, have you contacted them in the last 3 months by telephone or email? (spontaneous responses, single coded)
Base: All UK households using each type of provider (In 2013 – 2563 Landline, 2228 Broadband, 2285 Mobile phone, 1612 Pay TV)
Source: Ofcom research, omnibus survey, fieldwork carried out by Saville Rossiter-Base in August and September 2013.

↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level.

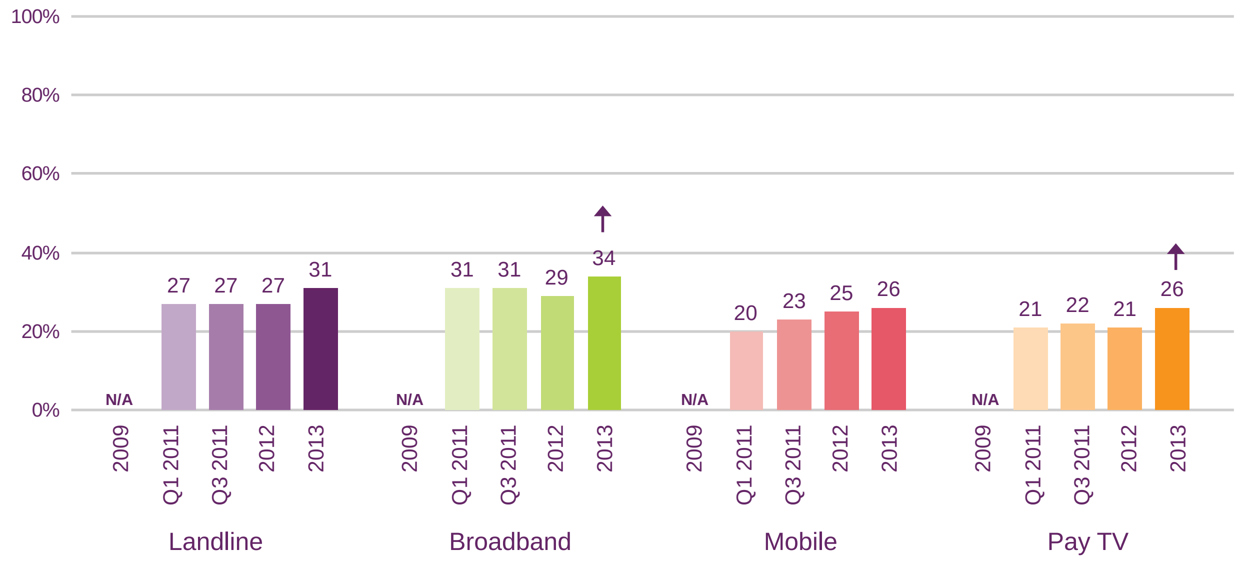
Proportion of complaints

Complaints have increased since 2012 for broadband and pay TV

Figure 2 shows the proportion of recent contacts with providers that were considered by customers to be complaints. Contacts considered to be complaints in 2013 are at the same level for mobile and pay TV (both 26%), and at a higher level for landline (31%) and broadband (34%).

Since 2012, the proportion of contacts that are considered to be complaints has increased for both broadband (34% vs. 29%) and pay TV (26% vs. 21%) whereas landline and mobile have remained at the same levels. In 2012, no levels of complaints had increased or decreased.

Figure 2: Proportion of customers who contacted their provider in the three months prior to the interview[5] with a complaint, by service type: 2009, 2011, 2012 and 2013



Q5a. And in your opinion, was the reason for this contact with [PROVIDER] a complaint, or something else? (prompted responses, single coded)
Base: All UK households contacting provider about each type of service (In 2013 – 1204 Landline, 1803 Broadband, 2002 Mobile phone, 1103 Pay TV)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013.

↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level.

[5] With the data for this measure coming from the online study, this means that the contact was between July and September 2013

Type of contact with provider

In 2013, the majority of contact with suppliers is by phone

Customers in contact with their provider in the three months prior to the interview were asked to say how they made contact most recently, as shown in Figure 3. The majority of contact for each sector is made by telephone, with around one in twenty customers only making contact by email.

While not shown in Figure 3, compared to 2012, there continues to be a preference for contact by phone, although there have been some changes in the type of contact.

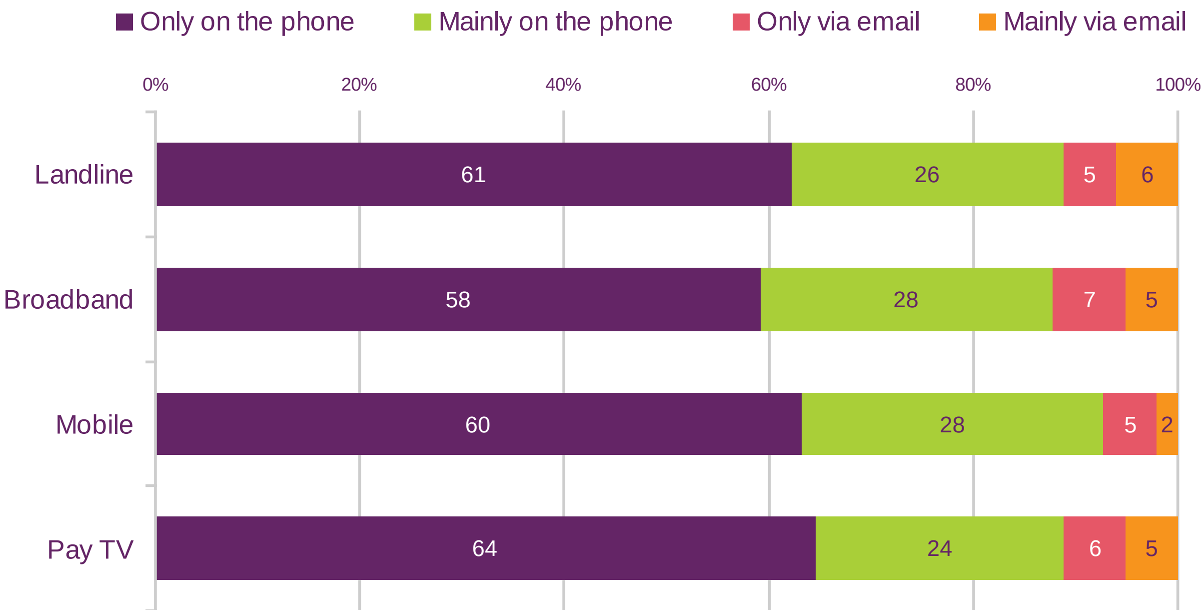
For landline, the type of contact is mostly unchanged since 2012, customers in 2013 are less likely to say they only made contact by email (5% vs. 8% in 2012).

Compared to 2012, broadband customers are less likely to say they only made contact by phone (58% vs. 63% in 2012) and are instead more likely to say they mainly made contact by phone (28% vs. 23% in 2012).

There is a similar picture for mobile customers; with those making contact in the three months prior to the interview more likely to say they mainly made contact by phone (28% vs. 23% in 2012) and less likely to say they only (5% vs. 9% in 2012) or mainly (2% vs. 5% in 2012) made contact by email.

Pay TV customers are also less likely in 2013 to say they only made contact by phone (64% vs. 70%) and are instead more likely to say they mainly made contact by phone (24% vs. 19%).

Figure 3: Type of contact made most recently, by service type: 2013



Q2. 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? (prompted responses, single coded)
Base: All UK households contacting provider about each type of service (In 2013 – 1204 Landline, 1803 Broadband, 2002 Mobile phone, 1103 Pay TV) – Note: Remaining percentages are 'Don't know' responses
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013.

Reason for recent contact with provider

Contact with landline, mobile and pay TV providers is most likely to be about a general issue

Customers were prompted with a list of seven possible reasons for contacting their landline provider and asked to say which one reason applied for their most recent contact. These seven possible responses were then grouped into three distinct categories: a billing issue, a fault or repair issue or a general enquiry issue.

The reasons within each type of issue are shown below:

BILLING
- A billing, pricing or payment issue
- A problem with your account details, for example name and address etc.

FAULT/ REPAIR
- A fault with the service you are buying from them, for example total or partial failure of service
- The service not performing as well as expected, for example issues with picture quality, broadband speed, mobile coverage etc.
- Problems with the repair service, for example it didn't happen or didn't solve the problem

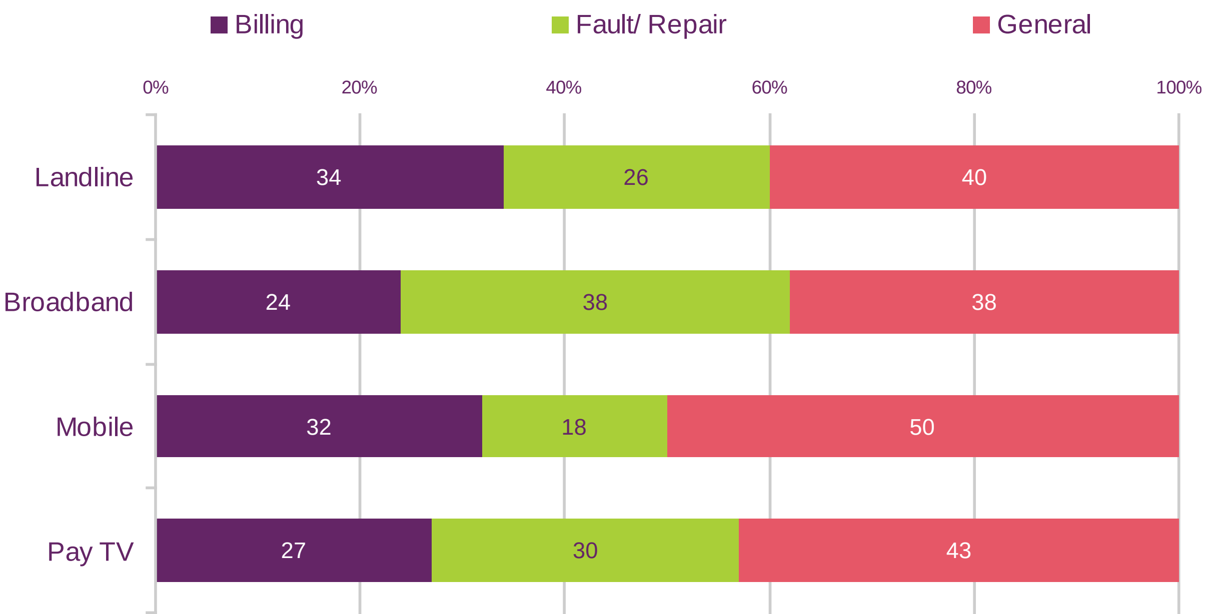
GENERAL ISSUE
- A problem relating to the installation or set up of your service
- Or something else, a general issue

Figure 4 shows the type of issue that customers most recently contacted their provider about in 2013.

Contact with customer service teams in both the landline and mobile sectors is most likely to be about a general issue (40% and 50% respectively) and least likely to be about a fault/ repair issue (26% and 18%). While pay TV contact is also most likely to be about a general issue (43%), no type of issue is least likely. Broadband contact differs from the other sectors in that contact about a fault/ repair issue and a general issue is equally likely (both 38%), with contact about a billing issue least likely (24%).

While not shown in Figure 4 below, compared to 2012 there have been no changes in any of the sectors in terms of the type of issue prompting contact from customers. There has been very little change in the type of issue since 2009 in the landline, broadband or mobile sectors. For pay TV there has been an increase in most recent contact about billing issues since 2009 (27% vs. 18% in 2009).

Figure 4: Type of issue for most recent contact, by sector: 2013



Q8. Thinking of the most recent issue you had to contact [PROVIDER] about, which one of the following categories did the issue fall into? Was it to do with..... ? (prompted responses, single coded)
Base: All UK households contacting provider about each type of service (In 2013 – 402 Landline, 576 Broadband, 600 Mobile phone, 413 Pay TV)
Source: Ofcom research, omnibus survey, fieldwork carried out by Saville Rossiter-Base in August and September 2013.

Issue resolution by provider

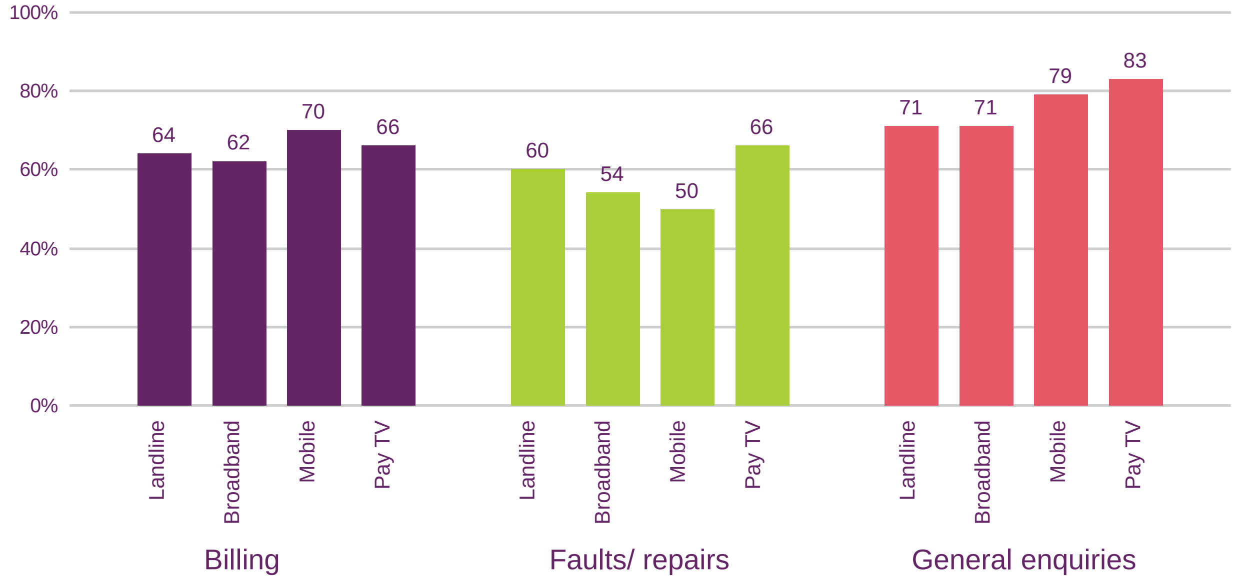
The majority of customers felt that the issue they contacted providers about had been resolved

Those that had contacted their provider in the three months prior to the interview were asked the extent to which they felt the issue they had contacted their provider about had been resolved. Respondents were given the choice of whether the issue had been fully resolved, partially resolved or if it was still unresolved (as defined by the respondent).

Figure 5 below shows the proportions in 2013 who considered their issue completely resolved[6] by issue type for each type of contact made to each type of provider. In 2013, a majority of all types of contact to all types of sectors resulted in the issue being completely resolved as far as the customer was concerned. For those making contact with broadband, mobile or pay TV providers, contact about a general issue is significantly more likely to be completely resolved than contact about a billing issue or a fault/ repair issue.

[6] It was decided in 2013 to report on complete resolution as issues that are 'partly' resolved may go on to be completely resolved or may remain only partly resolved

Figure 5: Whether the issue that the customer contacted their provider about was considered to be completely resolved, by sector: 2013



Q5. In your opinion, was [PROVIDER] able to successfully resolve your issue [BILLING/ FAULT/ GENERAL ENQUIRY]? (spontaneous responses, single coded)
Base: All UK households contacting provider about each type of issue (In 2013 – For billing 479 Landline, 477 Broadband, 783 Mobile, 316 Pay TV, for faults/ repairs 365 Landline, 785 Broadband, 416 Mobile, 394 Pay TV, for general enquiries, 360 Landline, 541 Broadband, 803 Mobile, 393 Pay TV)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013.

Compared to 2012 there have been no changes in any of the sectors. There has also been no change since 2009 by type of issue for the landline, broadband or mobile sectors. Pay TV providers are, however, more likely to now resolve contacts about general enquiries (83% vs. 74% in 2009).

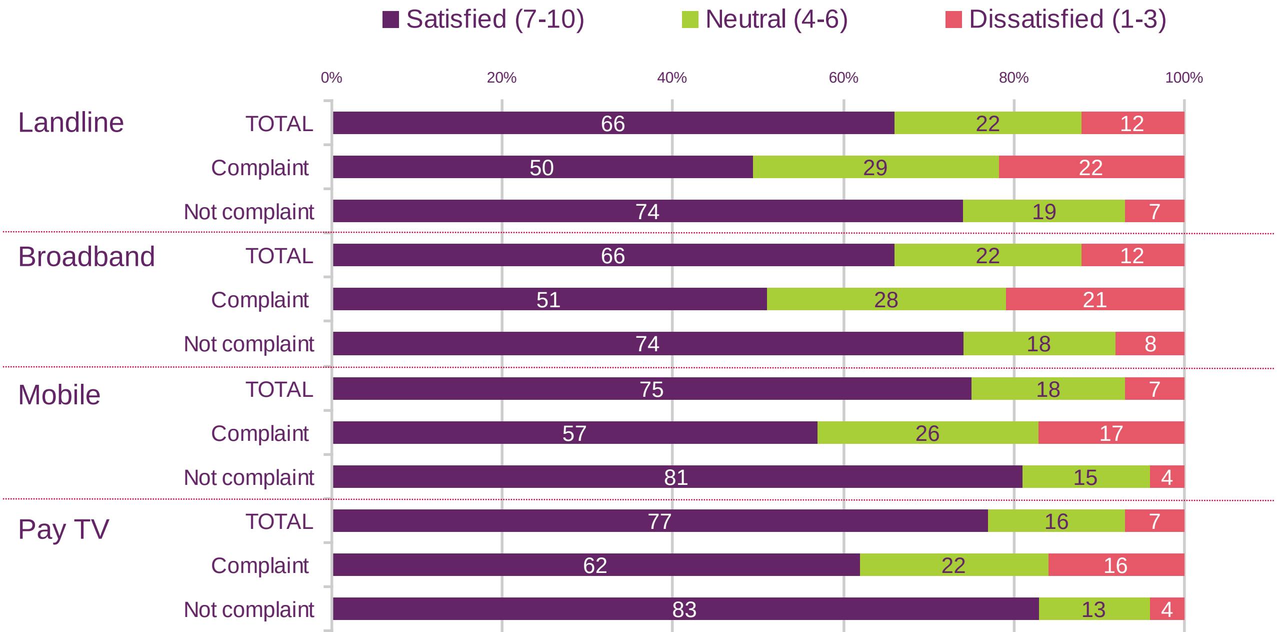
Satisfaction with provider's customer service

The majority of customers were satisfied with the service received from their provider, but satisfaction is lower for those making a complaint

Customers who had contacted their provider (either by phone or email) in the three months prior to the interview were asked to rate their satisfaction with the customer service they received using a 10 point scale; where 10 is extremely satisfied and 1 is extremely dissatisfied.

Figure 6 below shows the percentage of customers stating that they were satisfied (giving a rating of 7-10), neutral (4-6) or dissatisfied (1-3) with the service they received in 2013. A majority of all customers in each sector were satisfied with the customer service received. Satisfaction among those who made contact with a complaint is significantly lower than the average for each of the sectors, and accounts for half or more of customers making contact, as shown in Figure 10.

Figure 6: Satisfaction with customer service, by sector: 2013



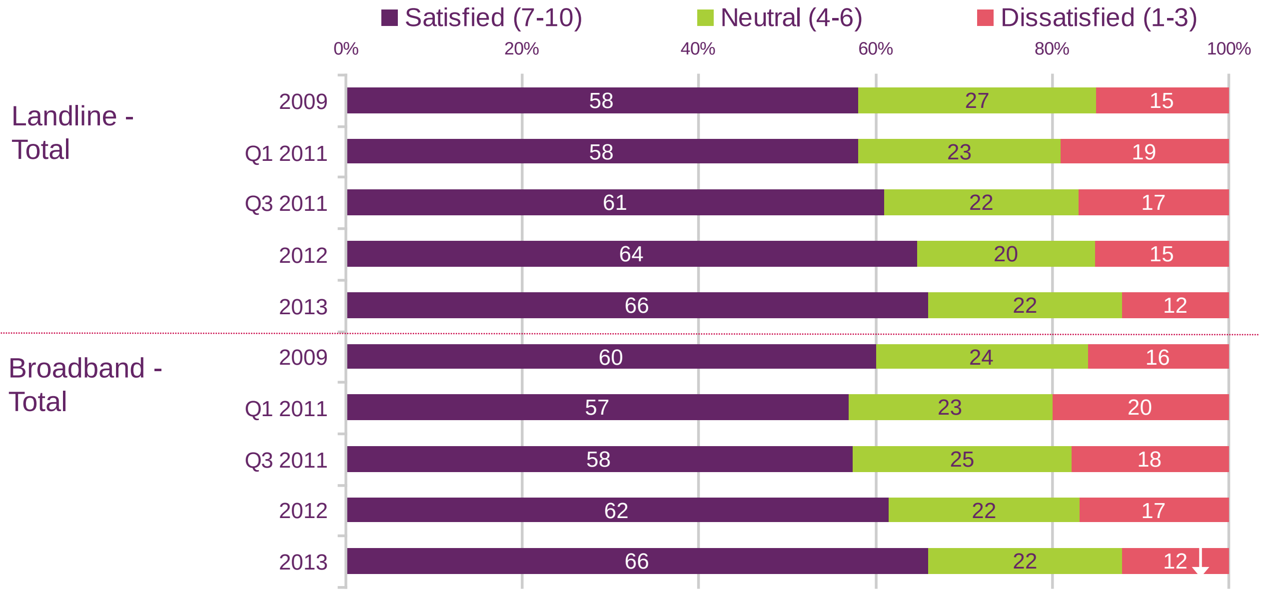
Q3. Overall, how satisfied are you with the service you received from [PROVIDER] customer services on this occasion? (prompted responses, single coded)
Base: All UK households contacting provider about each type of service (Total/ Complaint/ Not complaint) - Landline (1204/407/797) Broadband (1803/657/1146), Mobile (803/567/1435) Pay TV (1103/301/802).
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013

Figure 7 and Figure 8 below show the extent of satisfaction with the customer service received in each of the four sectors from 2009 to 2013. Compared to 2012 there have been some positive changes in some of the sectors, but no change for the landline sector.

Since 2012, broadband customers are less likely to say they were dissatisfied with the customer service they received from their provider (12% vs. 17%), but the proportion of satisfied customers has not increased significantly.

Since 2012, satisfaction with the customer service received has increased for both mobile customers (75% vs. 67%) and pay TV customers (77% vs. 69%).

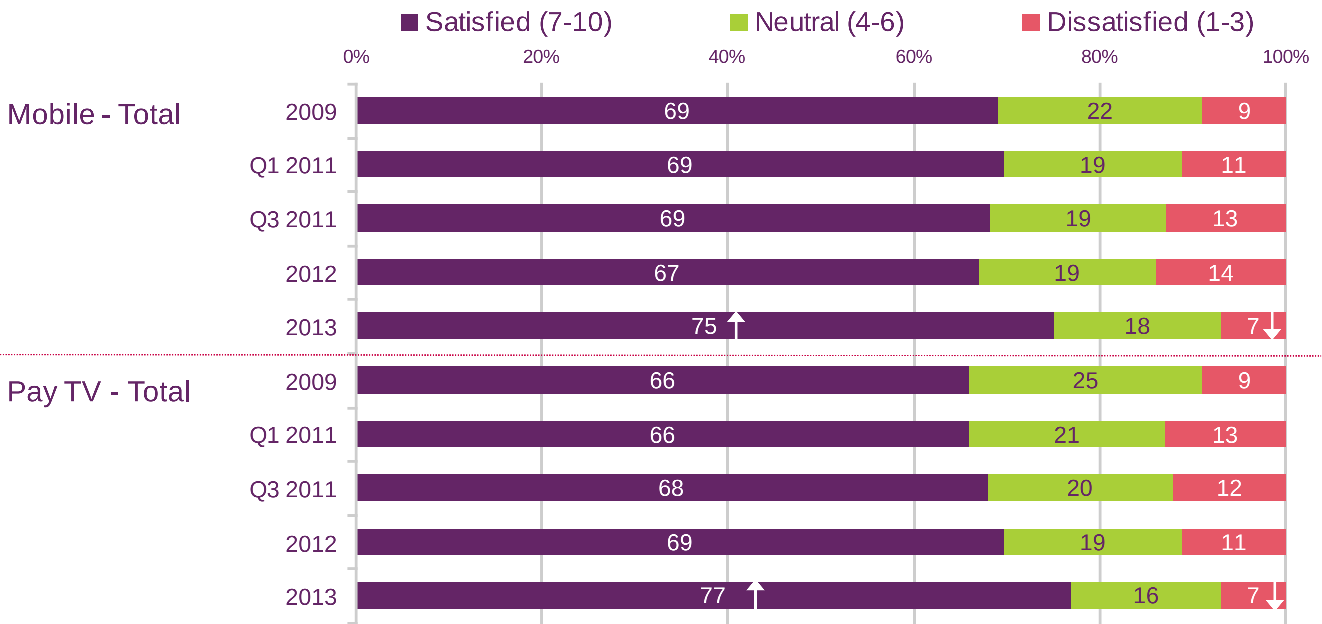
Figure 7: Satisfaction with customer service, by sector (landline and broadband): 2009, 2011, 2012 and 2013



Q3. Overall, how satisfied are you with the service you received from [PROVIDER] customer services on this occasion? (prompted responses, single coded)
Base: All UK households contacting provider about each type of service (1204 Landline, 1803 Broadband in 2013).
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013

↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level.

Figure 8: Satisfaction with customer service, by sector (mobile phone and pay TV): 2009, 2011, 2012 and 2013



Q3. Overall, how satisfied are you with the service you received from [PROVIDER] customer services on this occasion? (prompted responses, single coded)
Base: All UK households contacting provider about each type of service (803 Mobile, 1103 Pay TV in 2013).
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013

↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level.

Satisfaction with the service received among those contacting their provider with a complaint has increased for broadband, mobile and pay TV.

Figure 9 and Figure 10 below look at the trend in satisfaction with the customer service received among those making contact with a complaint in each of the four sectors from 2009 to 2013. Compared to 2012 there have been some positive changes in some of the sectors among those who contacted about a complaint, but no change for the landline sector.

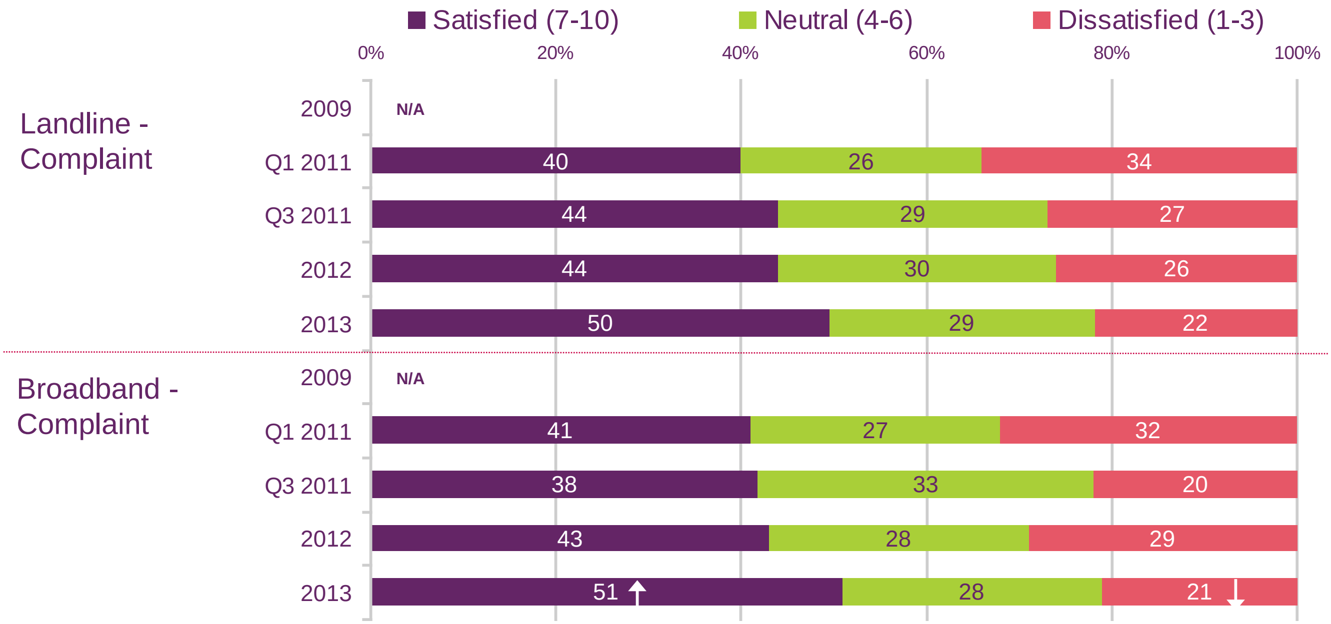
Since 2012, broadband customers with a complaint are more likely to say they were satisfied with the customer service received (51% vs. 43%) and less likely to say they were dissatisfied (21% vs. 29%).

Mobile customers with a complaint are now more likely to say they were satisfied with the customer service received (57% vs. 47%) and less likely to say they were dissatisfied (17% vs. 25%).

Finally, pay TV customers with a complaint are more likely since 2012 to say they were satisfied with the customer service received (62% vs. 46%) and less likely to say they were dissatisfied (16% vs. 26%).

Satisfaction with the customer service received among those contacting their provider with a complaint is at its highest level since it was first measured (in Q1 2011) for broadband, mobile and pay TV, but has not increased significantly since 2012 for landline.

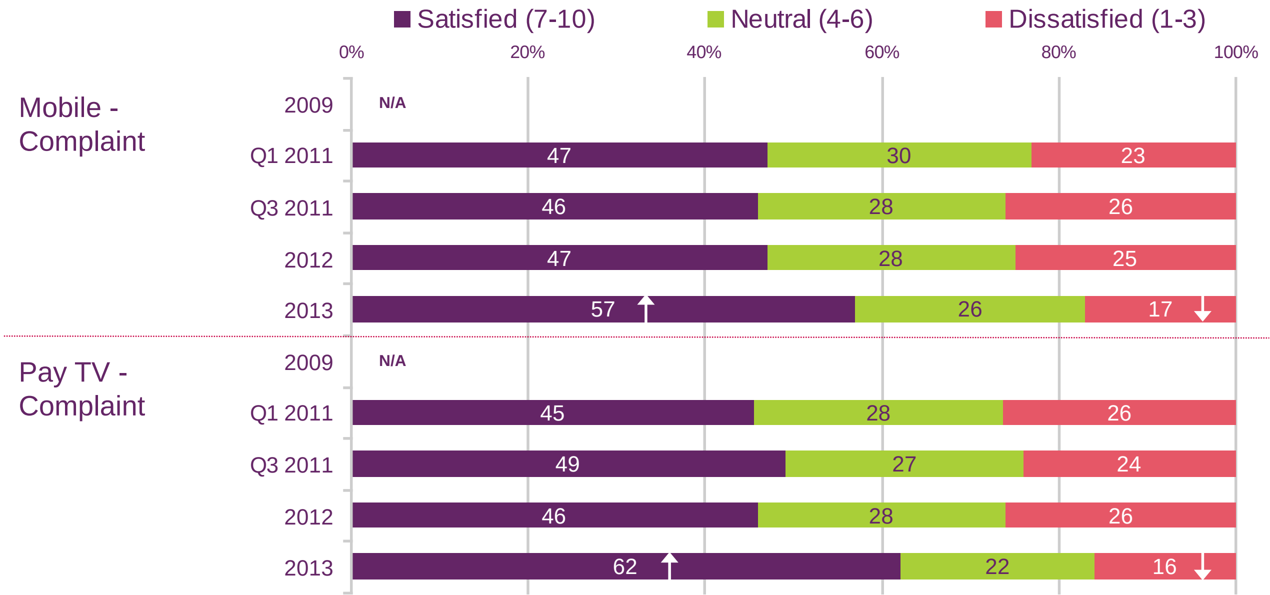
Figure 9: Satisfaction with customer service among those contacting with a complaint, by sector (landline and broadband): 2009, 2011, 2012 and 2013



Q3. Overall, how satisfied are you with the service you received from [PROVIDER] customer services on this occasion? (prompted responses, single coded)
Base: All UK households contacting provider about a complaint for each type of service (407 Landline, 657 Broadband in 2013).
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013

↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level.

Figure 10: Satisfaction with customer service among those contacting with a complaint, by sector (mobile phone and pay TV): 2009, 2011, 2012 and 2013



Q3. Overall, how satisfied are you with the service you received from [PROVIDER] customer services on this occasion? (prompted responses, single coded)
Base: All UK households contacting provider about a complaint for each type of service (567 Mobile, 301 Pay TV in 2013).
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013

↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level.

Interest in impartial service rating advice

Most customers claim that they would at least bear in mind customer service ratings for different companies when choosing a supplier

All customers who had made contact with their provider in the three months prior to the interview were prompted with four options regarding the provision of impartial information about different companies' customer service ratings, and were asked which applied to them. It was suggested to respondents that the purpose of providing this information about customer service ratings was to enable them to distinguish between good and bad performance.

Figure 11 below shows the responses from customers in 2013, across the four communications service sectors, and by level of satisfaction among those who recently contacted their provider.

Across each of the four sectors, around six in ten customers say they would at least bear in mind this type of impartial information if they were thinking about changing provider. Interest in customer service ratings is markedly higher among those who were dissatisfied with the customer service they received, when they most recently contacted their provider; rising to around eight in ten customers for this group.

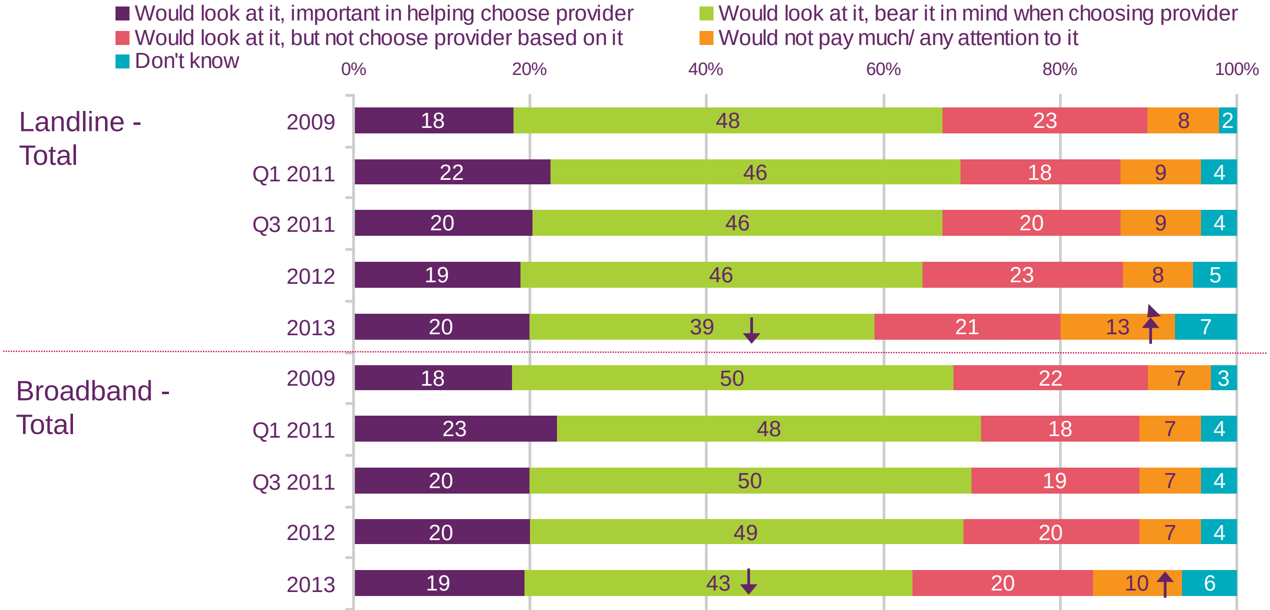
Figure 11: Need for impartial information, by sector: 2013

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? (prompted responses, single coded)
Base: All UK households contacting provider about each type of service (Total/ Satisfied/ Dissatisfied) - Landline (1204/812/126) Broadband (1803/1185/218), Mobile (2002/1465/161) Pay TV (1103/847/82). * Caution: Base below 100
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013

Figure 12 and Figure 13 below compare responses from 2009 to 2013 from customers for each sector in terms of their interest in impartial information offered through customer service ratings.

In 2013 there has been a decline in the degree of interest in customer service ratings. There has been a fall in the proportion of customers who say they would 'bear it in mind' for each of the four sectors, and an increase in the proportion stating they would 'not pay much/ any attention to it' among landline, broadband and mobile customers.

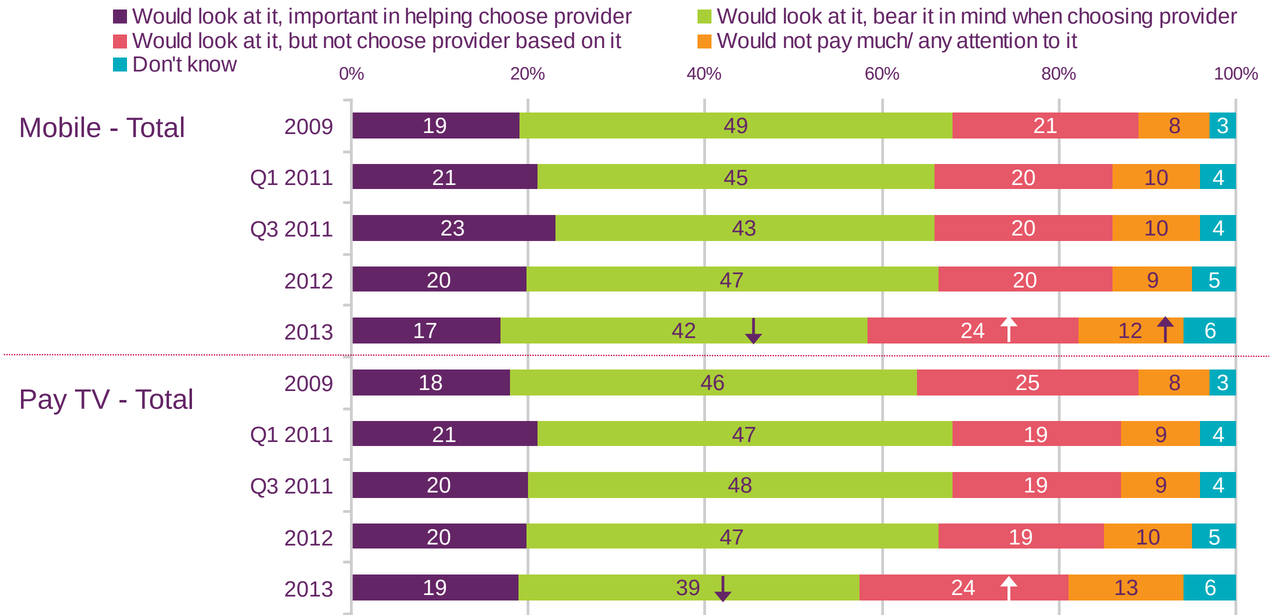
Figure 12: Need for impartial information, by sector (landline and broadband): 2009, 2011, 2012 and 2013



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? (prompted responses, single coded)
Base: All UK households contacting provider about each type of service - Landline (1204) Broadband (1803)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013

↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level.

Figure 13: Need for impartial information, by sector (mobile phone and pay TV): 2009, 2011, 2012 and 2013



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? (prompted responses, single coded)
Base: All UK households contacting provider about each type of service - Mobile (2002) Pay TV (1103)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013

↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level.

Section 4

Landline sector

This section looks in detail at the landline sector. It shows, where possible, how each provider included (BT, Sky, TalkTalk and Virgin Media) performs against key measures such as:

- incidence of contact about landline
- incidence of complaints
- issue type
- whether the issue was completely resolved
- satisfaction with customer service
- future use based on customer service experience

For each measure this section shows how the provider performs in 2013 against the overall landline sector average. This section also shows, where possible, how the sector average and the provider-specific measures in 2013 compare to those in 2012. The longer term trend is also reported.

Recent contact with provider

Compared to 2012, there has been an increase in customers contacting their landline provider – attributable to an increase among BT customers, following the decline in 2012

Figure 14 below shows the proportion of customers that have made contact (by telephone or email), in the three months prior to the interview[7], with any of the four landline providers. This contact was either regarding a specific issue relating to their landline or a more general issue that applies to all the services they may take with that provider.[8]

In 2013, one in six (16%) of all UK households using one of the four landline providers had contacted their provider in the three months prior to the interview. In 2013, this measure does not differ by provider compared to the sector average.[9]

Following the decline noted in 2012 for the overall landline sector and for BT, there has been an increase in overall contact to any landline provider (16% vs. 12% in 2012), with this increase attributable to BT customers being more likely to make contact (16% vs. 10% in 2012). Levels of contact are now comparable with those noted between 2009 and 2011 for the overall landline sector and for BT. There has been no change since 2012 for any of the other landline providers.

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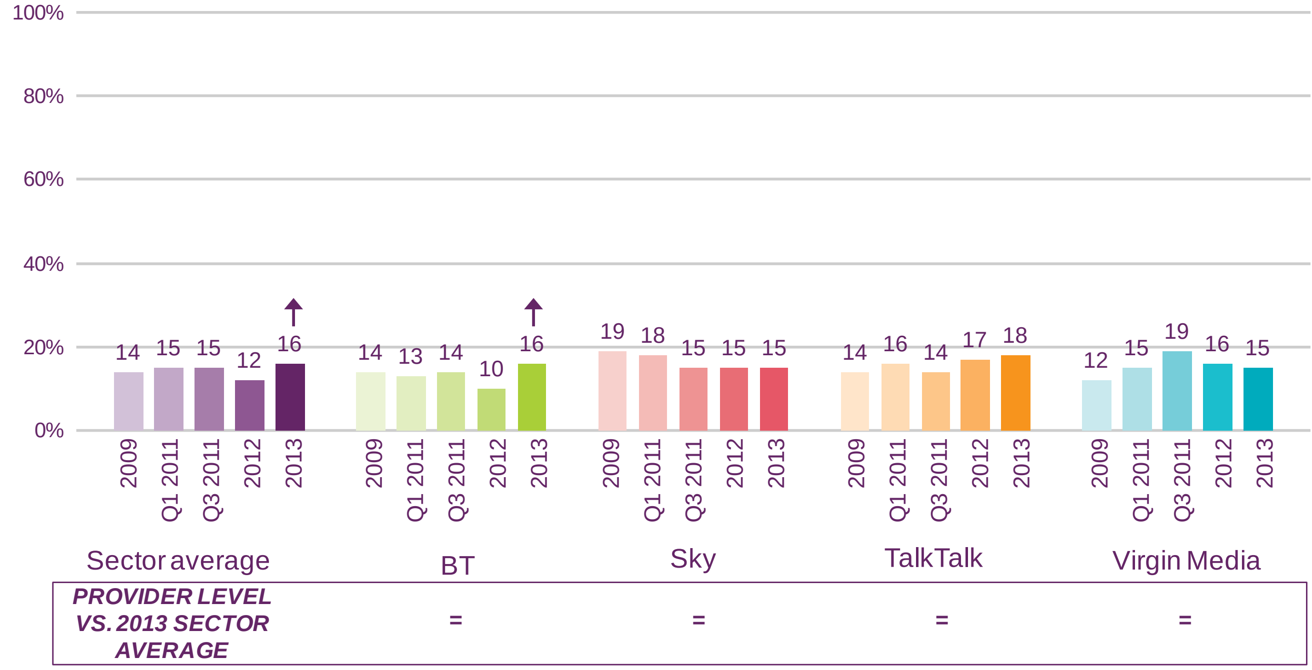
[7] With the data for this measure coming from the omnibus study this means that the contact was between May and July 2013

[8] So for example, if a customer has their landline and broadband service provided by BT and they did not say their most recent contact was regarding the landline specifically, then they were asked whether it was a general issue that applies to both their landline and broadband service

[9] This is indicated by the '=' symbols appearing for each provider in the box below the chart within Figure 14. This convention is included across several of the Figures in this and subsequent sections. If in 2013, for a given measure a provider performs better than the sector average the box below the chart will show *'HIGHER'* for that particular provider and if a provider performs worse then it will show *'LOWER'*

Figure 14: Proportion of customers that had contacted their landline provider in the three months prior to the interview: 2009, 2011, 2012 and 2013



Q6. Thinking of [PROVIDER] and the services you buy from them, have you contacted them in the last 3 months by telephone or email? (spontaneous responses, single coded)
Base: All UK households using landline providers (In 2013 – 2563 Total, 1352 BT, 336 Sky, 355 TalkTalk, 520 Virgin Media).
Source: Ofcom research, omnibus survey, fieldwork carried out by Saville Rossiter-Base in August and September 2013.

↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level.

Proportion of complaints

The proportion of contacts considered to be complaints has increased since 2012 for BT landline customers, but no provider reported complaint levels higher or lower than average for the sector

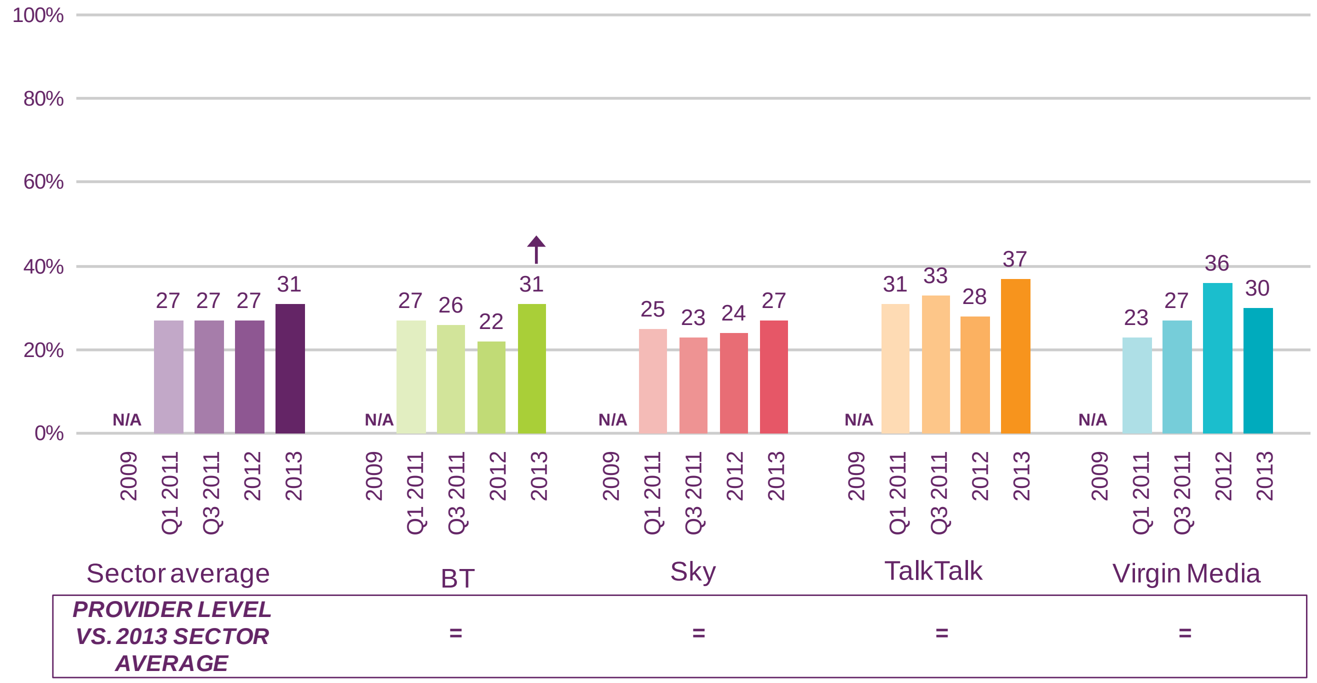
Since the 2011 surveys, those customers that have contacted their landline provider (in the previous three months[10]) are asked whether they considered the reason for this contact to be a complaint[11]. Figure 15 shows that overall three in ten contacts (31%) are considered to be complaints. As with overall contact (shown in Figure 14), this incidence does not vary in 2013 for any of the four providers compared to the sector average.

There has also been no significant change since 2012 in the proportion of contacts considered to be complaints for the landline sector overall (31% vs. 27% in 2012). BT customers are, however, more likely since 2012 to consider their recent contact to be a complaint (31% vs. 22%).

[10] With the data for this measure coming from the online study this means that the contact was between July and September 2013

[11] Respondents were not prompted with a definition of a complaint, this was therefore self- defined by the respondent

Figure 15: Proportion of customers who contacted their provider in the three months prior to the interview with a complaint - landline: 2009, 2011, 2012 and 2013



Q5a. And in your opinion, was the reason for this contact with [PROVIDER] a complaint, or something else? (prompted responses, single coded)
Base: All UK households contacting landline provider (In 2013 – 1204 Total, 302 BT, 301 Sky, 301 TalkTalk, 300 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013.

↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level.

Most recent contact by issue type

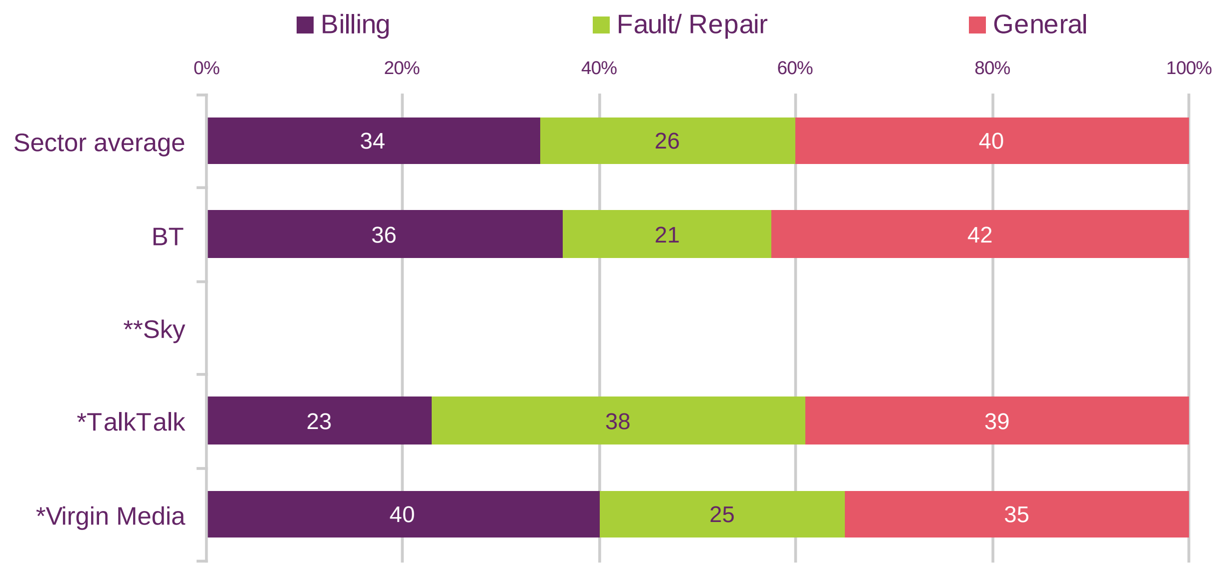
There has been no change since 2012 in the type of issue that customers are contacting their landline provider about

Customers were prompted with a list of seven possible reasons for contacting their landline provider and asked to say which one reason applied for their most recent contact. These seven possible responses were then grouped into three distinct categories: a billing issue, a fault or repair issue or a general enquiry issue.

Figure 16 below shows the incidence of the three types of issue in 2013. Across all landline providers, four in ten contacts (40%) relate to a general enquiry, with one in three (34%) contacts about a billing issue, and one in four (25%) contacts about a fault or repair. Within the landline sector overall it is therefore less common for recent contact to be about a fault/ repair than about a billing or general issue.

There are no differences among BT, TalkTalk or Virgin Media customers compared to the overall sector average.[12] Since 2012, where base sizes allow the comparison, there has been no change in the type of issue that landline providers are contacted about.

Figure 16: Type of issue for most recent contact with landline provider: 2013[13]



Q8. Thinking of the most recent issue you had to contact [PROVIDER] about, which one of the following categories did the issue fall into? Was it to do with..... ? (prompted responses, single coded) * Caution: Base below 100, **Base below 50, not reported.
Base: All UK households contacting landline provider (In 2013 – 402 Total, 220 BT, 49 Sky, 63 TalkTalk, 70 Virgin Media)
Source: Ofcom research, omnibus survey, fieldwork carried out by Saville Rossiter-Base in August and September 2013.

↑↓ indicates significantly higher/ lower than sector average at the 99% confidence level.

Key issues by contact type

The most common reason for contacting the landline provider is to make a change to the package or service

Figure 17 shows the top four reasons for recent contact with service providers, by each issue type[14]. No single reason accounts for a majority of contacts from landline customers to their provider in 2013, as in 2012.

The most commonly mentioned reason for contacting their provider was to change their package or service (12%), in terms of upgrading or downgrading it. A similar proportion made contact due to poor

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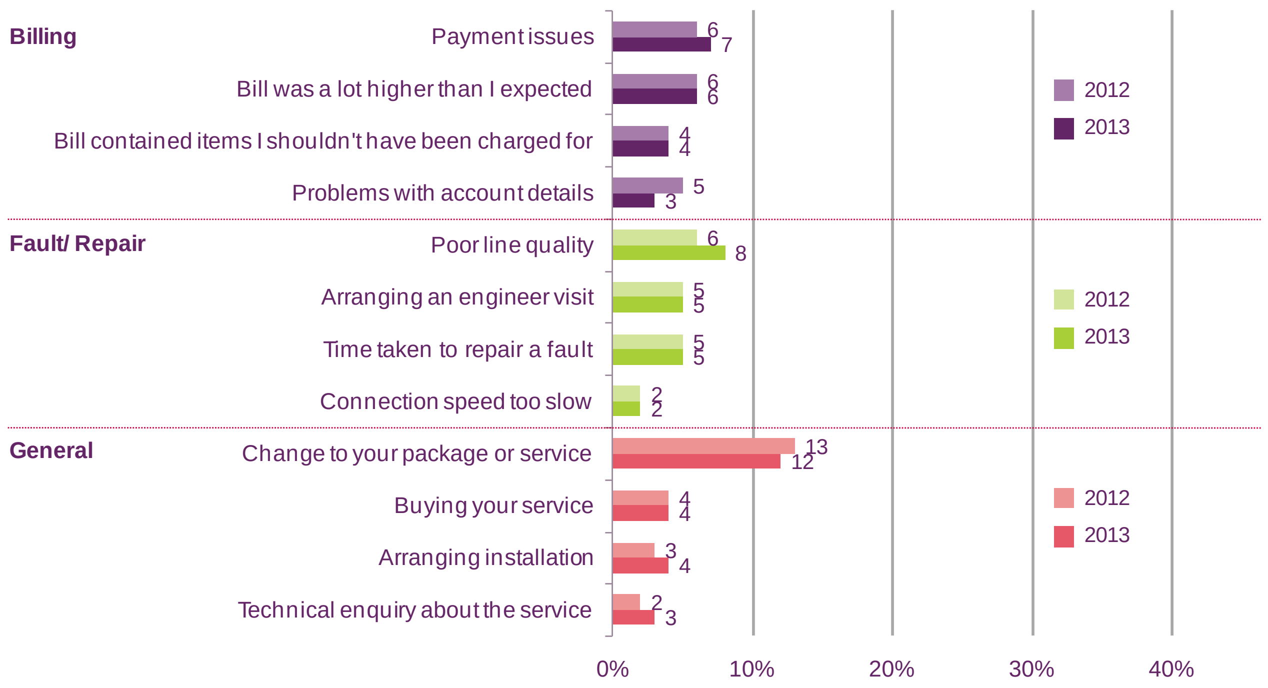
[12] Please note that the number of interviews conducted on the omnibus study among TalkTalk and Virgin Media landline customers are between 50 and 100 interviews and should therefore be treated as indicative only. The results for Sky landline customers from the omnibus are not shown as they total under 50 interviews.
[13] Please note that the number of interviews conducted on the omnibus study among TalkTalk and Virgin Media landline customers are between 50 and 100 interviews and should therefore be treated as indicative only. The results for Sky landline customers from the omnibus are not shown as they total under 50 interviews.
[14] Respondents were shown a different list of reasons to choose from dependent on whether they said their most recent contact was regarding a billing, fault and repair or general issue. To enable a comparison the data in Figure 17 is expressed as a proportion of all those that have contacted their landline provider in the last 3 months.

line quality (8%), payment issues (7%) or their bill being a lot higher than expected (6%). Around one in twenty (5%) or fewer customers contacted their provider for any other reason.

There has been no change in the incidence of these reasons for contact compared with 2012.

Figure 17: Landline – Top 4 issues per contact type: 2012 and 2013



S7a-c. And more specifically, which of the following best describes what the issue with [PROVIDER] was concerning? (prompted responses, single coded)
Base: All UK households contacting landline provider (In 2013 – 1204 Total, In 2012 – 1200 Total)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013.

↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level.

Issue resolution

Compared to the sector overall, Sky customers are more likely to say their general enquiry had been resolved

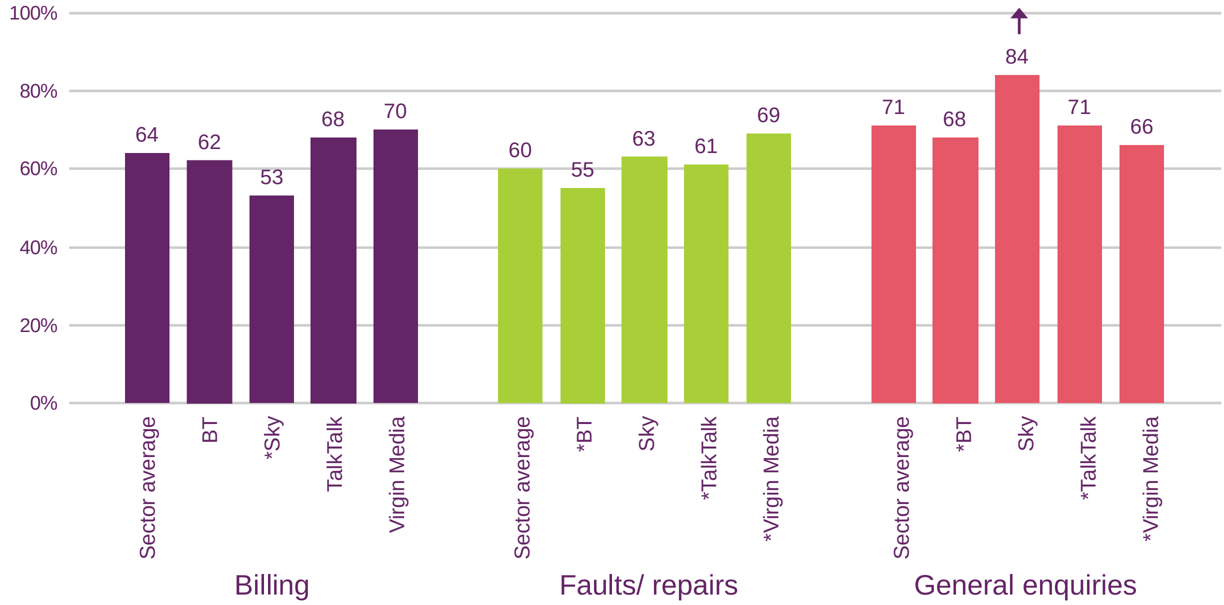
Those that had contacted their landline provider were asked the extent to which they felt the issue they had contacted their provider about had been resolved. Respondents were given the choice of whether the issue had been fully resolved, partially resolved or if it was still unresolved (as defined by the respondent). Figure 18 below shows the proportions in 2013 who considered their issue completely resolved[15] by issue type for each provider. Figure 19 then shows any differences in these measures compared to 2012.

[15] It was decided in 2013 to report on complete resolution only as issues that are ‘partly’ resolved may go on to be completely resolved or may remain only partly resolved

As shown in Figure 18, a majority of customers contacting any landline provider about each type of issue (billing/ fault or repair/ general enquiries) felt that this issue had been completely resolved. This is also the case for each issue type among each provider.

When looking at provider performance compared to the sector average by the type of issue, in 2013, no individual provider performs better or worse than the sector average for billing or fault/ repair issues. Sky customers are more likely to have resolved a general enquiry compared to the sector overall (84% vs. 71% for the sector average. While not shown in Figure 18, at an overall sector level, resolution does not vary by the type of issue, as shown earlier in Figure 5. Landline providers are as likely to resolve billing issues (64%) as they are to resolve fault or repair issues (60%) or general enquiries (71%). This is also true for BT, TalkTalk and Virgin Media. Sky customers making contact about a general enquiry are, however, more likely to say the issue was completely resolved (84%) compared to those who contacted about a billing issue (53%) or a fault/ repair (63%).

Figure 18: Landline - Whether the issue that the customer contacted their provider about was considered to be completely resolved, by provider: 2013



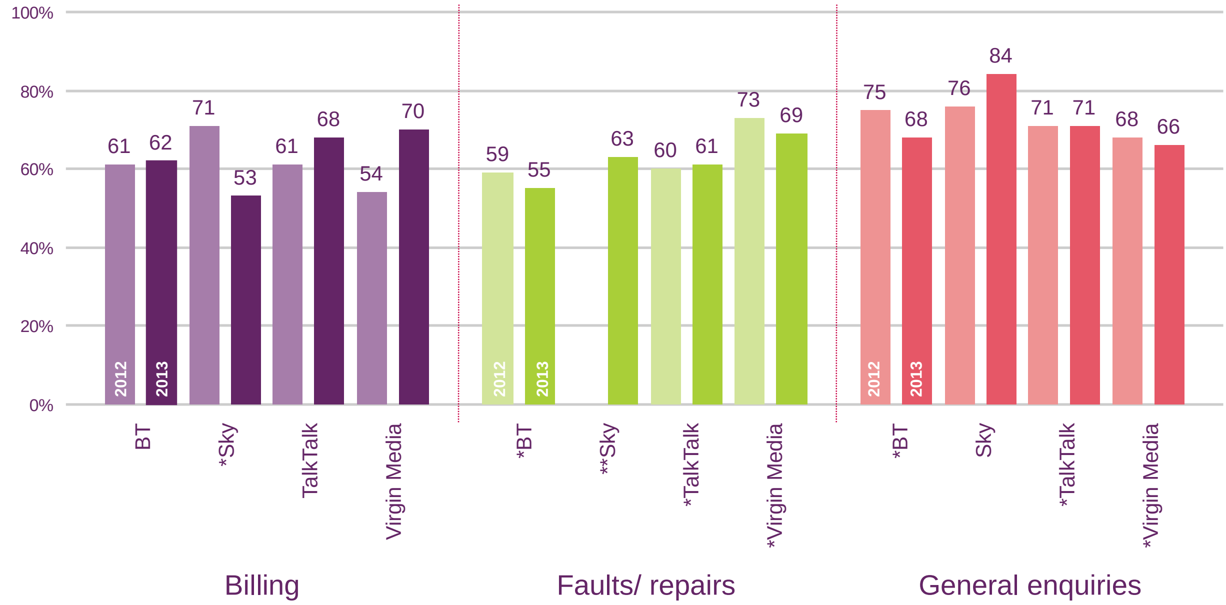
Q5. In your opinion, was [PROVIDER] able to successfully resolve your issue [BILLING/ FAULT/ GENERAL ENQUIRY]? (spontaneous responses, single coded) * Caution: Base below 100
Base: All UK households contacting landline provider about each type of issue (In 2013 – For billing 479 Total, 143 BT, 98 Sky, 121 TalkTalk, 117 Virgin Media, for faults/ repairs 365 Total, 86 BT, 103 Sky, 83 TalkTalk, 93 Virgin Media, for general enquiries 360 Total, 73 BT, 100 Sky, 97 TalkTalk, 90 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013.

↑↓ indicates significantly higher/ lower than sector average at the 99% confidence level.

Figure 19 shows that, where it is possible to draw comparisons between 2012 and 2013, there has been no change in issue resolution by provider type.

While not shown in Figure 18 or Figure 19, those that contacted their landline provider with a complaint are significantly less likely to feel that their issue was resolved (54%) compared to those whose issue was not considered a complaint (71%).

Figure 19: Landline - Whether the issue that the customer contacted their provider about was considered to be completely resolved, by provider: 2012 and 2013



Q5. In your opinion, was [PROVIDER] able to successfully resolve your issue [BILLING/ FAULT/ GENERAL ENQUIRY]? (spontaneous responses, single coded) * Caution: Base below 100 **Base below 50, not reported for Faults/ repairs for Sky in 2012
Base: All UK households contacting landline provider about each type of issue (In 2013 – For billing 479 Total, 143 BT, 98 Sky, 121 TalkTalk, 117 Virgin Media, for faults/ repairs 365 Total, 86 BT, 103 Sky, 83 TalkTalk, 93 Virgin Media, for general enquiries 360 Total, 73 BT, 100 Sky, 97 TalkTalk, 90 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013.

↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level.

Number of contacts

Half of customers contacting their landline provider said they only did so once

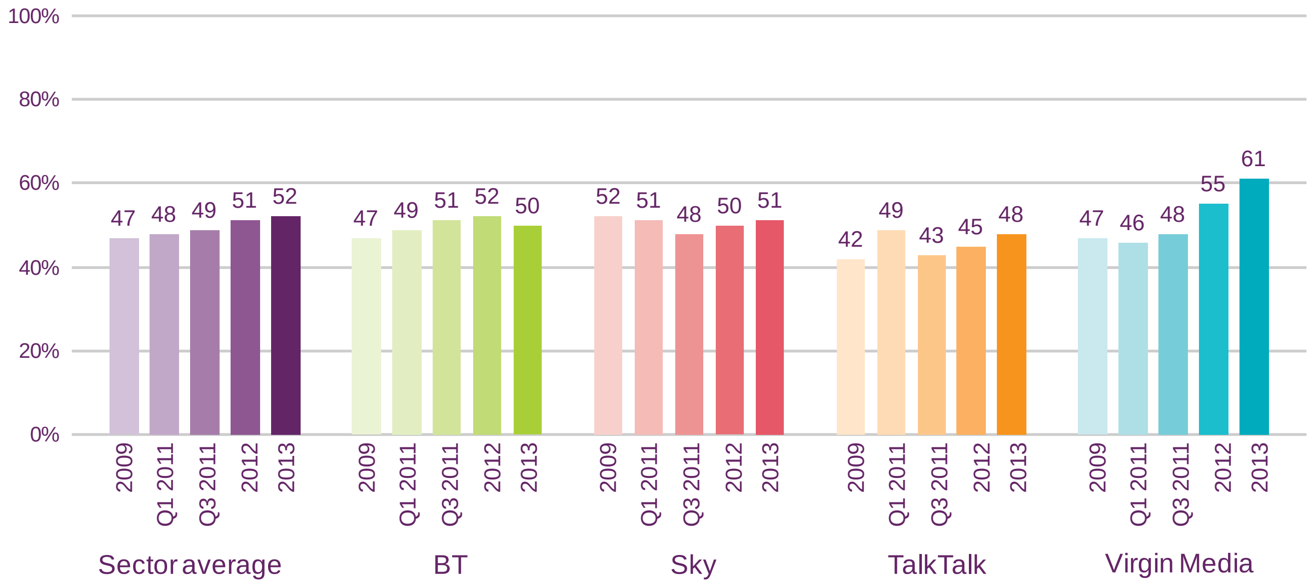
Customers were asked how many times they had been in contact, so far, with their landline provider about their most recent issue. Figure 20 shows the proportion that had only been in contact once with their landline provider, at an overall sector level and by provider (between 2009 and 2013).

Half (52%) of customers contacting any landline provider, only made contact on one occasion and this measure is unchanged since 2012. In 2013, Virgin Media customers are more likely to have made contact once compared to the sector overall (61% vs. 52%). There has been no change in this incidence since 2012 for any individual landline provider.

Those customers who did not feel their issue was a complaint are more likely to have contacted their landline provider only once compared to those making contact with a complaint (59% vs. 35% for those with a complaint).

Although not shown in Figure 20, the proportion of customers in contact once with their landline provider stands at 65% among those who considered that their issue had been completely resolved. Across the landline providers, those contacting Virgin Media whose issue has been completely resolved are more likely than the sector overall to have made contact once (75% vs. 65%). There has been no change in this incidence since 2012 for any individual landline provider or the sector overall.

Figure 20: Proportion in contact with the provider once – landline: 2009, 2011, 2012 and 2013



PROVIDER LEVEL VS. 2013 SECTOR AVERAGE	BT	Sky	TalkTalk	Virgin Media
	=	=	=	***HIGHER***

Q6. How many times have you been in contact with [PROVIDER] in relation to this particular issue so far? (prompted responses, single coded)
Base: All UK households contacting landline provider (In 2013 – 1204 Total, 302 BT, 301 Sky, 301 TalkTalk, 300 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013.

↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level.

Overall satisfaction with customer service

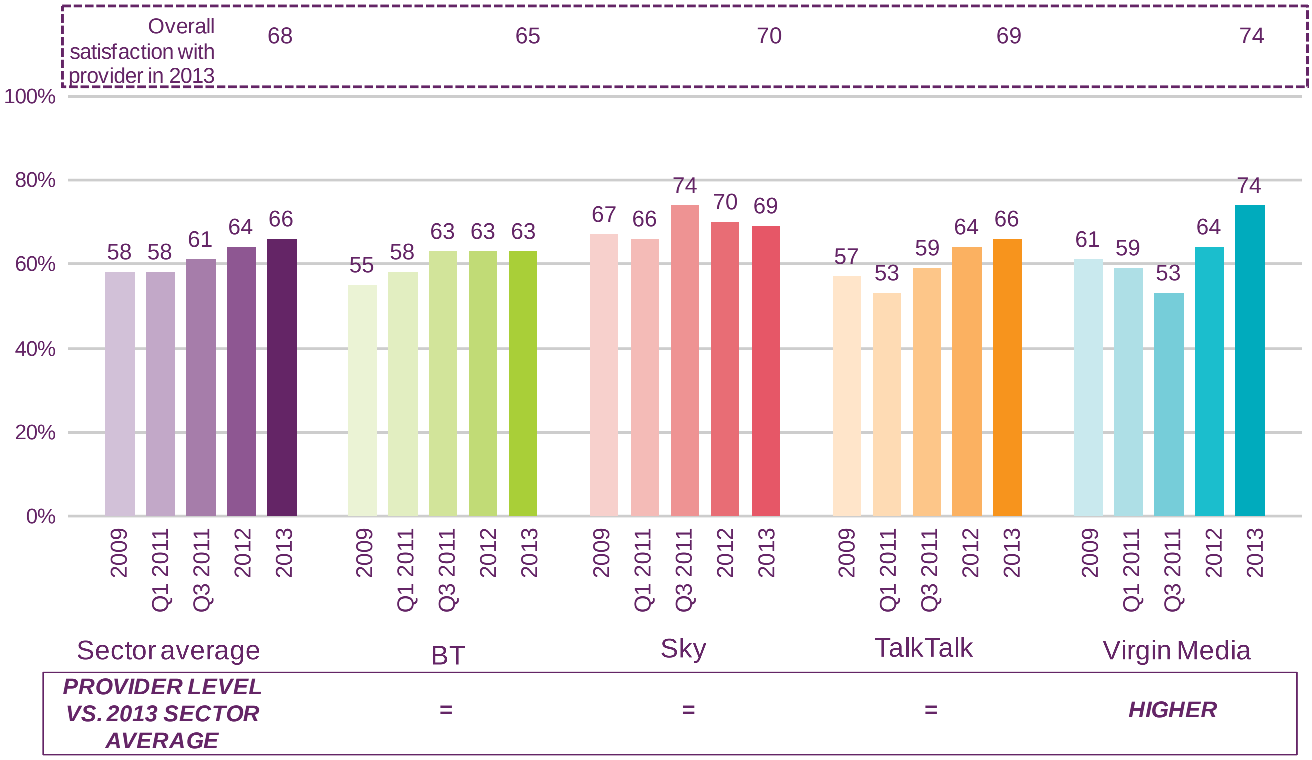
Virgin Media customers are more likely to be satisfied with the customer service received compared to the average for this sector

Satisfaction with the customer service provided by the landline provider when the customer was recently in contact, as shown in Figure 21, is at a comparable level to overall satisfaction with the provider for the sector overall and for each provider.

In 2013, two in three customers (66%) who contacted their landline provider were satisfied with the customer service received, with this rising to three in four (74%) for Virgin Media. There are no other differences in satisfaction for any other provider compared to the sector overall.

Compared to 2012, there has been no change in satisfaction with customer service at an overall sector level or for any individual provider.

Figure 21: Satisfaction with customer service from provider – landline: 2009, 2011, 2012 and 2013



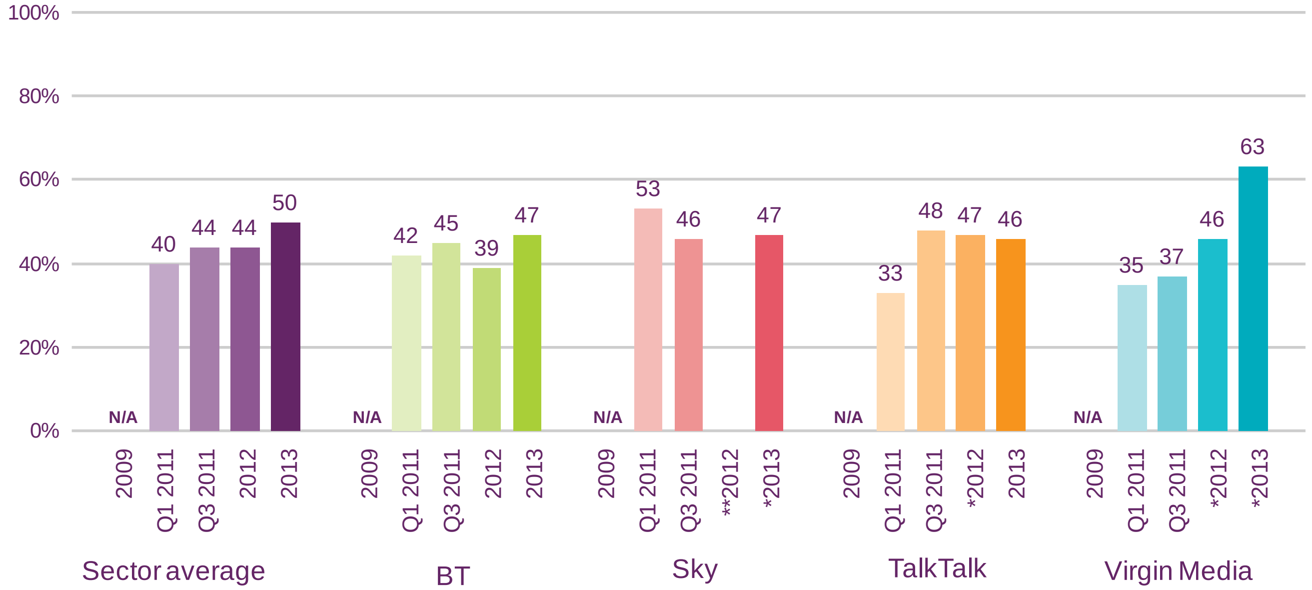
Q3. Overall how satisfied are you with the service you received from [PROVIDER] customer services on this occasion? (prompted responses, single coded)
Base: All UK households contacting landline provider (In 2013 – 1204 Total, 302 BT, 301 Sky, 301 TalkTalk, 300 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013.
↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level.

Figure 22 shows overall satisfaction with customer service among those customers who contacted their landline provider with a complaint. Satisfaction among those with a complaint remains lower than the average for all contacts. Half of those (50%) who contacted their landline provider with a complaint were satisfied with the customer service received. In 2013, this average for the sector does not vary by provider.

Since 2012, where it is possible to make a comparison[16], overall satisfaction with customer service among customers with a complaint are unchanged for each provider and for the sector overall. The apparent rise at an overall level is not statistically significant, and the apparent rise for Virgin Media is indicative only[17].

[16] It is not possible to make a comparison over time among Sky landline customers with a complaint due to low base sizes in 2012
[17] The rise from 46% to 63% for Virgin Media is significant at 95% confidence but not at 99%.

Figure 22: Satisfaction with customer service from provider – landline complaints: 2009, 2011, 2012 and 2013



PROVIDER LEVEL VS. 2013 SECTOR AVERAGE	BT	Sky	TalkTalk	Virgin Media
	=	=	=	=

Q3. Overall how satisfied are you with the service you received from [PROVIDER] customer services on this occasion? (prompted responses, single coded) * Caution: Base below 100 **Base below 50, not reported for Sky in 2012
Base: All UK households contacting landline provider with a complaint (In 2013 – 407 Total, 108 BT, 89 Sky, 116 TalkTalk, 94 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013.

↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level.

Satisfaction with contacting customer service

Sky and Virgin Media report higher than average satisfaction with the ease of getting through to the right person

Customers who had contacted their landline provider (either by phone or email) were asked to rate their satisfaction with various aspects of their provider's customer services on a 10 point scale; where 10 is extremely satisfied and 1 is extremely dissatisfied.

Figure 23 below shows the percentage of customers stating that they were satisfied (giving a rating of 7-10) for three measures relating to contacting customer services.[18]

In 2013, among all those who contacted their landline provider, satisfaction is highest for ease of finding provider contact details (65%) and lowest for calling back when they said they would (44%). Results do not vary for either of these measures by individual provider compared to the sector averages.

Nearly three-fifths (58%) of those who contacted their landline provider by phone were satisfied with the ease of getting through to the right person, with higher satisfaction among those customers contacting Sky (69%) or Virgin Media (67%).

[18] 'Measure 3: Ease of getting through to the right person' was asked of those who contacted customer services by phone.

Since 2012, there has been an increase in the proportion of customers satisfied with their landline provider calling them back when they said they would (44% vs. 36%). This increase in the sector average is not attributable to any particular provider

Figure 23: Satisfaction with contacting customer service

% satisfied (giving a rating of 7-10)	Sector average		BT		Sky		TalkTalk		Virgin Media	
Measure 1	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Ease of finding provider contact details	67	65	66	61	67	68	64	67	72	73
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		=		=
Measure 2	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Calling you back when they said they would	36	44↑	37	44	48	48	35	42	31	41
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		=		=
Measure 3	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Ease of getting through to the right person (phone only)	56	58	53	51	66	69	54	60	61	67
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		*H*		=		*H*

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 (prompted responses, single coded)
Base: All UK households contacting landline provider / contacting by phone (In 2013 – 1204/1142 Total,302/ 288 BT, 301/ 279 Sky, 301/ 284 TalkTalk, 300/ 291 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013

↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level

=/ *H*/ *L* indicates that the provider's measure does not differ/ is higher/ is lower compared to the sector average in 2013

Satisfaction with speed of customer service

Three in five customers continue to be satisfied with the speed of customer services

Figure 24 below shows the percentage of customers stating that they were satisfied (giving a rating of 7-10) with two specific measures relating to the speed of customer service[19].

Three in five customers who contacted their landline provider were satisfied with both the speed of answering the phone (58%) and the time taken to handle the issue (61%). In 2013, results do not vary by landline provider against these sector averages for either measure. There have also been no changes since 2012 for either measure for any individual provider or in the sector average.

Figure 24: Satisfaction with the speed of customer service

% satisfied (giving a rating of 7-10)	Sector average		BT		Sky		TalkTalk		Virgin Media	
Measure 1	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Speed of answering phones (phone only)	58	58	54	51	68	65	60	60	61	66
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		=		=
Measure 2	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
The time taken to handle issue	60	61	57	56	63	64	62	62	62	68
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		=		=

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 (prompted responses, single coded)
Base: All UK households contacting landline provider / contacting by phone (In 2013 – 1204/1142 Total, 302/ 288 BT, 301/ 279 Sky, 301/ 284 TalkTalk, 300/ 291 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013
↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level
=/ H/ L indicates that the provider's measure does not differ/ is higher/ is lower compared to the sector average in 2013

[19] 'Measure 1: Speed of answering the phone' was asked of those who contacted customer services by phone.

Satisfaction with advice from customer service

Three in five who contacted their landline provider felt the information received was useful

Customers contacting their landline provider in the three months prior to the interview were asked to rate their satisfaction with three aspects relating to the standard of advice from their landline provider (Figure 25).

Satisfaction with the standard of advice from the landline provider's customer service is consistent across each of its three constituent elements. At least three in five customers were satisfied that the advice/ information was easy to understand (64%), useful (60%), and with getting the issue resolved to their satisfaction (63%). These sector averages do not vary by provider in 2013.

There has also been no change for any of these measures since 2012 for the landline sector overall or for any individual provider.

Figure 25: Satisfaction with the standard of advice from customer service

% satisfied (giving a rating of 7-10)	Sector average		BT		Sky		TalkTalk		Virgin Media	
Measure 1	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Advice/ information was easy to understand	65	64	66	60	66	72	63	62	66	71
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		=		=
Measure 2	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Advice/ information was useful	62	60	62	56	64	67	59	60	60	68
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		=		=
Measure 3	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Getting the issue resolved to your satisfaction	62	63	63	59	63	69	61	65	63	69
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		=		=

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 (prompted responses, single coded)
Base: All UK households contacting landline provider (In 2013 – 1204 Total, 302 BT, 301 Sky, 301 TalkTalk, 300 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013

↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level

=/ H/ L indicates that the provider's measure does not differ/ is higher/ is lower compared to the sector average in 2013

Satisfaction with customer service advisor

Since 2012, Virgin Media has improved across several measures relating to satisfaction with the customer service advisor, but no provider is rated above the average

Customers contacting their landline provider in the three months prior to the interview were asked to rate their satisfaction with the customer service advisor for six individual measures. These measures are shown across Figure 26 and Figure 27.

In 2013 for the landline sector overall, satisfaction is highest for courtesy and politeness of advisors (77%) and lowest for the advisor logging query details to avoid having to repeat yourself (58%). In 2013, no individual provider performs better or worse against the sector average for any of the six measures.

Since 2012, however, satisfaction has increased for the measure relating to the courtesy and politeness of the advisors (77% vs. 70%); with this increase attributable to an increase among Virgin Media customers (79% vs. 69%). While the overall landline sector score has not increased significantly since 2012 for the advisor keeping you informed throughout the process and for them logging query details, satisfaction with both of these measures has increased among Virgin Media customers (67% vs. 56% in 2012 for keeping you informed, and 65% vs. 54% in 2012 for logging details).

Figure 26: Satisfaction with the customer service advisor

% satisfied (giving a rating of 7-10)	Sector average		BT		Sky		TalkTalk		Virgin Media	
Measure 1	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Courtesy and politeness of advisers	70	77↑	72	76	72	80	66	73	69	79↑
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		=		=
Measure 2	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Adviser ability to understand the issue and identify the problem	61	66	61	63	66	72	58	62	62	71
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		=		=
Measure 3	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Adviser took my questions/ issue seriously	67	70	68	67	69	76	67	70	64	74
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		=		=

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 (prompted responses, single coded)
Base: All UK households contacting landline provider (In 2013 – 1204 Total, 302 BT, 301 Sky, 301 TalkTalk, 300 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013

↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level

=/ H/ L indicates that the provider's measure does not differ/ is higher/ is lower compared to the sector average in 2013

Figure 27: Satisfaction with the customer service advisor/ 2

% satisfied (giving a rating of 7-10)	Sector average		BT		Sky		TalkTalk		Virgin Media	
Measure 4	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Keeping you informed throughout the process	58	63	58	60	64	68	59	62	56	67 ↑
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		=		=
Measure 5	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Adviser doing what they said they would do	62	66	63	64	65	72	61	65	61	70
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		=		=
Measure 6	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Logging of query details to avoid having to repeat yourself	53	58	51	56	62	64	48	54	54	65 ↑
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		=		=

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 (prompted responses, single coded)
Base: All UK households contacting landline provider (In 2013 – 1204 Total, 302 BT, 301 Sky, 301 TalkTalk, 300 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013

↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level
=/ H/ L indicates that the provider's measure does not differ/ is higher/ is lower compared to the sector average in 2013

Satisfaction with other aspects of customer service

There has been an increase in satisfaction for offering compensation or a goodwill payment, driven by a rise in this area for BT

Figure 28 shows the percentage of satisfied customers for more general customer service attributes. While most customers who contacted their landline provider were satisfied with the willingness to help resolve the issue (66%), half as many were satisfied with the provider offering compensation or a goodwill payment (33%). In 2013, no landline provider differs from the sector averages for either of these measures.

Compared to 2012, there has been an increase in satisfaction for offering compensation or a goodwill payment (33% vs. 27%); with this due to an increase in satisfaction among BT customers (32% vs. 23%).

Figure 28: Satisfaction with other aspects of customer service

% satisfied (giving a rating of 7-10)	Sector average		BT		Sky		TalkTalk		Virgin Media	
Measure 1	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Offering compensation or a goodwill payment	27	33↑	23	32↑	35	38	28	30	28	36
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		=		=
Measure 2	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Willingness to help resolve your issue	62	66	61	64	64	69	60	65	63	73
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		=		=

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 (prompted responses, single coded)
Base: All UK households contacting landline provider (In 2013 – 1204 Total, 302 BT, 301 Sky, 301 TalkTalk, 300 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013

↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level

=/ H/ L indicates that the provider's measure does not differ/ is higher/ is lower compared to the sector average in 2013

Future use of provider based on experience

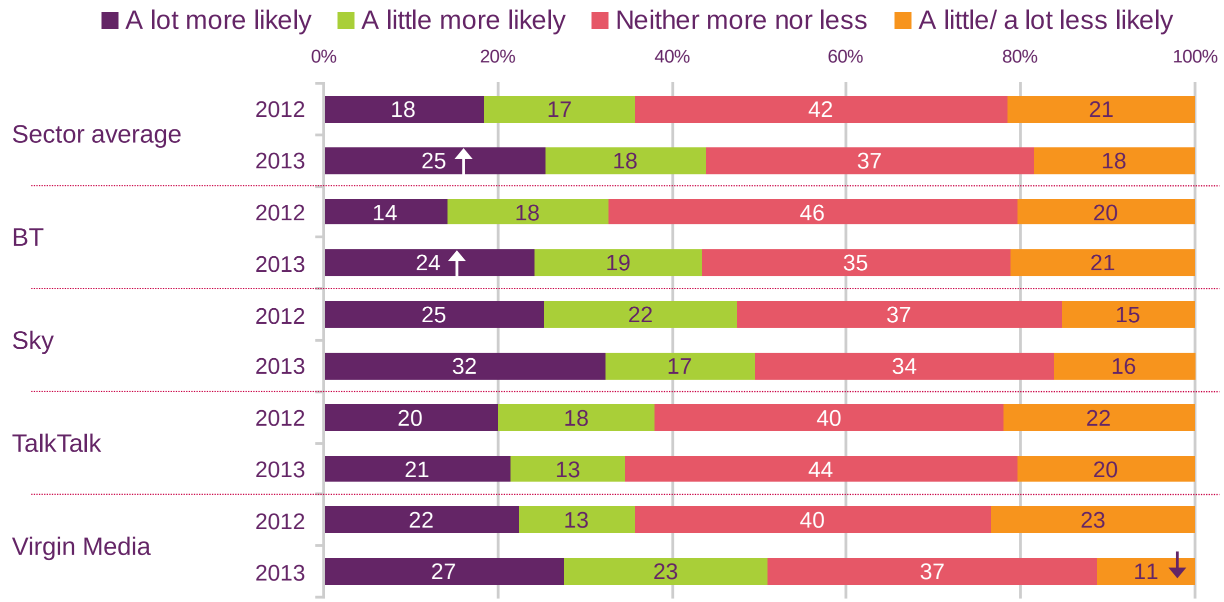
While no provider stands out compared to the sector overall, BT customers are more likely than in 2012 to say they would use BT in the future as a result of their recent customer service experience

Customers contacting their landline provider were asked whether their most recent customer service experience has made them more or less likely to use their landline provider in the future. Results are shown at an overall level and by provider for 2012 and 2013 in Figure 29.

Compared to 2012 more customers contacting their landline provider say they are 'a lot more likely' to use their provider in the future (25% vs. 18%) with this increase driven by BT customers (24% vs. 14%). Fewer Virgin Media customers now say they are a little or a lot less likely to use their provider in future (11% vs. 23% in 2012).

Among all customers contacting their landline provider in 2013, one in four said they were now 'a lot more likely' to use their landline provider again (25%) while one in five said they were now 'a little or a lot less likely' (18%). No provider stands out in 2013 in terms of having a higher proportion of customers who say they are now more likely to use their provider in future.

Figure 29: Future use of provider given customer service experience - landline: 2012 and 2013



Q7. Has your experience of [PROVIDER]'s customer service for this issue made you more or less likely to use [PROVIDER] in the future? (prompted responses, single coded)
Base: All UK households contacting landline provider (In 2013 – 1204 Total, 302 BT, 301 Sky, 301 TalkTalk, 300 Virgin Media
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013.

↑↓ indicates significantly higher/ lower for 'A lot more likely' or 'less likely' compared to 2012 at the 99% confidence level.

Section 5

Broadband sector

This section looks in detail at the broadband sector. It shows, where possible, how each provider included (BT, Orange, Sky, TalkTalk and Virgin Media) performs against key measures such as:

- incidence of contact about broadband
- incidence of complaints
- issue type
- whether the issue was completely resolved
- satisfaction with customer service
- future use based on customer service experience

For each measure this section shows how the provider performs in 2013 against the overall broadband sector average. This section also shows, where possible, how the sector average and the provider-specific measures in 2013 compare to those in 2012. The longer term trend is also reported.

Recent contact with provider

A quarter of broadband customers had contacted their provider about the service in the three months prior to the interview, levels comparable with those in Q1 and Q3 2011

Figure 30 below shows the proportion of customers that have made contact (by telephone or email), in the three months prior to the interview[20], with any of the five broadband providers. This contact was either regarding a specific issue relating to their broadband service or a more general issue that applies to all the services they may take with that provider.[21]

In 2013, one in four (26%) of all UK households using one of the five broadband providers that we track in this report had contacted their provider in the three months prior to the interview. This measure does not differ by provider compared to the sector average[22].

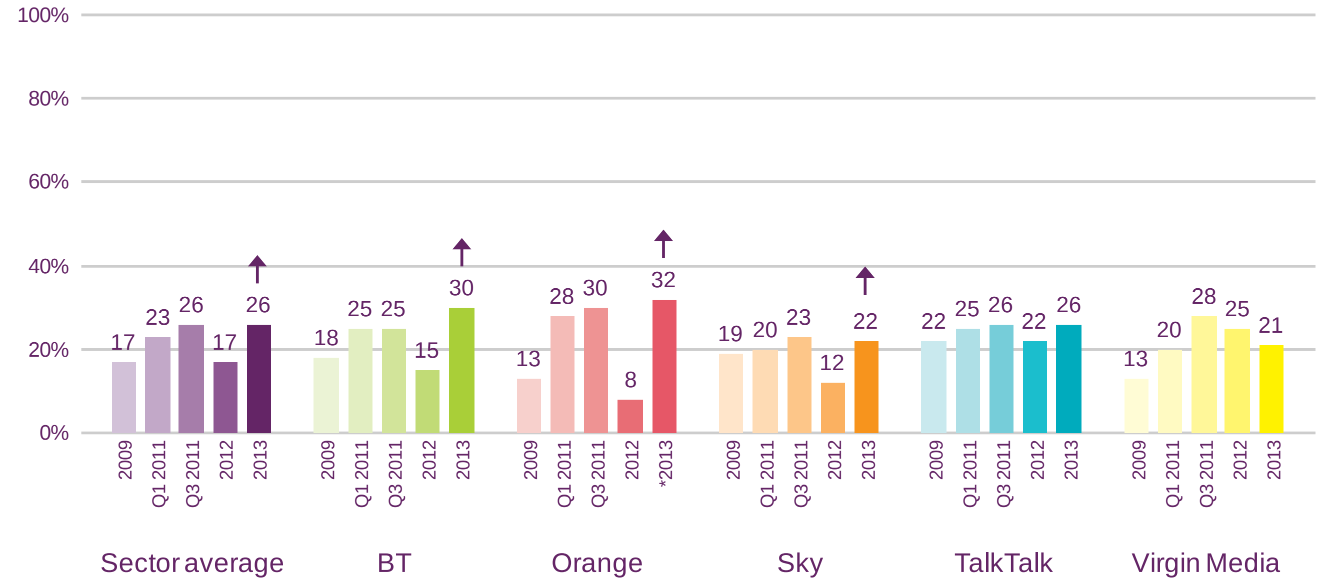
Since 2012, there has been an increase in overall contact to any broadband provider (26% vs. 17% in 2012), with this change attributable to an increase among BT customers (30% vs. 15% in 2012), among Orange customers (32% vs. 8%) and among Sky customers (22% vs. 12%). It is worth noting however, that these increases in 2013 for each of these three providers and at an overall level, follow a significant decrease in contacts in 2012. These incidences in 2013 are therefore more comparable to the incidences in Q3 2011.

[20] With the data for this measure coming from the omnibus study this means that the contact was between May and July 2013

[21] So for example, if a customer has their broadband and landline service provided by BT and they did not say their most recent contact was regarding the broadband specifically, then they were asked whether it was a general issue that applies to both their broadband and landline service

[22]This is indicated by the '=' symbols appearing for each provider in the box below the chart within Figure 30. This convention is included across several of the Figures in this and subsequent sections. If in 2013, for a given measure a provider performs better than the sector average the box below the chart will show *'HIGHER'* for that particular provider and if a provider performs worse then it will show *'LOWER'*

Figure 30: Proportion of customers that had contacted their broadband provider in the three months prior to the interview: 2009, 2011, 2012 and 2013



	BT	Orange	Sky	TalkTalk	Virgin Media
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE	=	=	=	=	=

Q6. Thinking of [PROVIDER] and the services you buy from them, have you contacted them in the last 3 months by telephone or email? (spontaneous responses, single coded)
Base: All UK households using broadband providers (In 2013 – 2228 Total, 828 BT, 66 Orange, 423 Sky, 365 TalkTalk, 546 Virgin Media)
*Caution: Base below 100
Source: Ofcom research, omnibus survey, fieldwork carried out by Saville Rossiter-Base in August and September 2013.
↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level.

Proportion of complaints

Following a period of decline, the proportion of TalkTalk broadband contacts considered to be complaints, increased, but remains comparable to the sector average

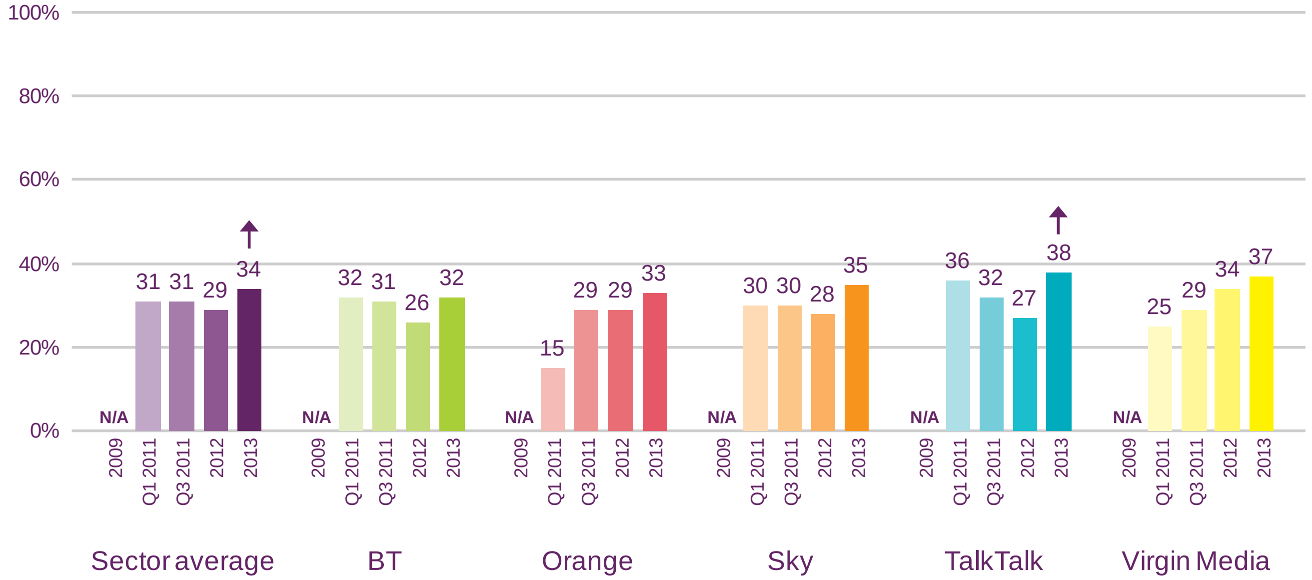
Since the Q1 2011 survey, those customers that have contacted their broadband provider (in the three months prior to the interview)[23] are asked whether they considered the reason for this contact to be a complaint[24]. Figure 31 shows that overall one in three contacts (34%) are considered to be complaints. As with overall contact (shown in Figure 30), this incidence does not vary in 2013 for any of the five providers compared to the sector average.

There has also been a rise since 2012 in the proportion of contacts considered to be complaints for the broadband sector overall (34% vs. 29% in 2012), with this attributable to an increase in the proportion of self-defined complaints among TalkTalk customers (38% vs. 27%).

[23]With the data for this measure coming from the online study this means that the contact was between July and September 2013

[24] Respondents were not prompted with a definition of a complaint, this was therefore self- defined by the respondent

Figure 31: Proportion of customers who contacted their provider in the three months prior to the interview with a complaint - broadband provider: 2009, 2011, 2012 and 2013



PROVIDER LEVEL VS. 2013 SECTOR AVERAGE	BT	Orange	Sky	TalkTalk	Virgin Media
	=	=	=	=	=

Q5a. And in your opinion, was the reason for this contact with [PROVIDER] a complaint, or something else? (prompted responses, single coded)
Base: All UK households contacting broadband provider (In 2013 – 1803 Total, 404 BT, 195 Orange, 401 Sky, 402 TalkTalk, 401 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013.

↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level.

Most recent contact by issue type

There has been no change since 2012 in the type of issue that customers are contacting their broadband provider about

Customers were prompted with a list of seven possible reasons for contacting their broadband provider and asked to say which one reason applied for their most recent contact. These seven possible responses were then grouped into three distinct categories: a billing issue, a fault or repair issue or a general enquiry issue.

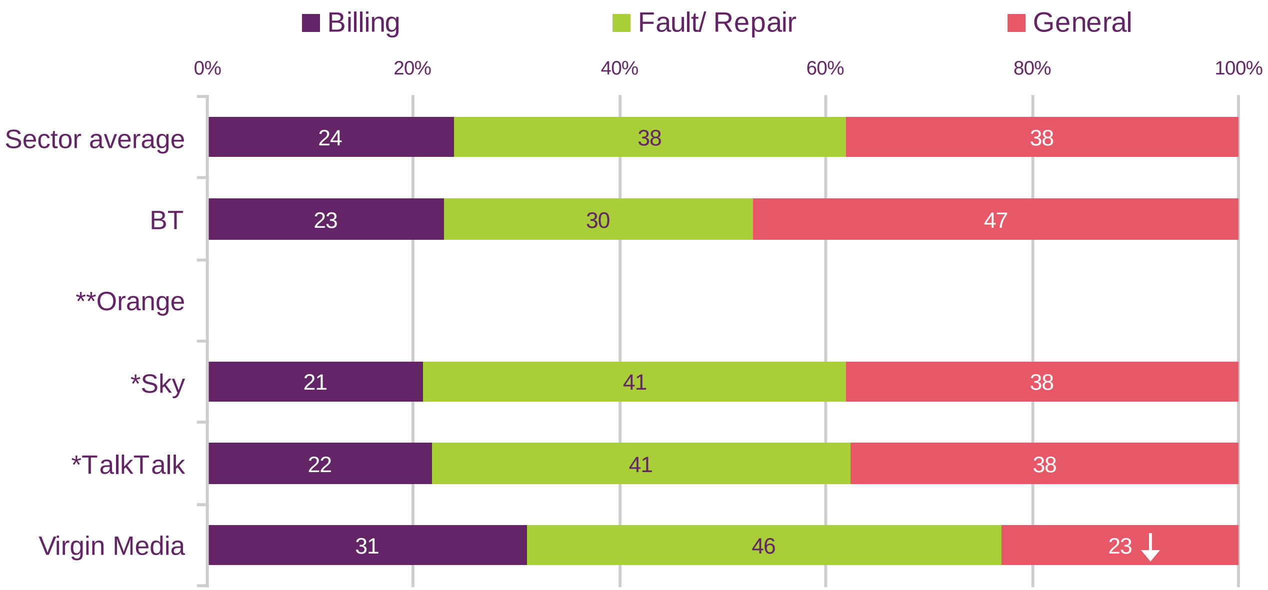
Figure 32 below shows the incidence of the three types of issue in 2013. Within the broadband sector overall it is less common for recent contacts to be about a billing issue than about a fault/ repair or a general issue. Across all broadband providers, close to four in ten contacts (38%) relate to a general enquiry, or a fault or repair (38%) and one in four contacts (24%) about a billing issue.

In 2013, the profile of contacts do not differ among BT, TalkTalk or Sky customers compared to the overall sector average.[25] Recent customer contact about a general enquiry is less likely for Virgin Media customers compared to the sector overall (23% vs. 38%).

[25] Please note that the number of interviews conducted on the omnibus study among Sky and TalkTalk broadband customers are between 50 and 100 interviews and should therefore be treated as indicative only. The results for Orange broadband customers from the omnibus are not shown as they total under 50 interviews.

Since 2012, where base sizes allow the comparison, there has been no change in the type of issue that broadband providers are contacted about.

Figure 32: Type of issue for most recent contact with broadband provider: 2013[26]



Q8. Thinking of the most recent issue you had to contact [PROVIDER] about, which one of the following categories did the issue fall into? Was it to do with..... ? (prompted responses, single coded)
Base: All UK households contacting broadband provider (In 2013 – 576 Total, 256 BT, 23 Orange, 88 Sky, 97 TalkTalk, 112 Virgin Media)
*Caution: Base below 100, **Base below 50, not reported
Source: Ofcom research, omnibus survey, fieldwork carried out by Saville Rossiter-Base in August and September 2013.

↑↓ indicates significantly higher/ lower than sector average at the 99% confidence level.

Key issues by contact type

The most common reason for contacting the broadband provider, is a slow broadband connection speed

Figure 33 shows the top four reasons for recent contact with service providers, by each issue type[27]. No single reason accounts for a majority of contacts from broadband customers to their provider in 2013, as in 2012.

The most commonly mentioned reason for contacting their provider was that the connection speed is too slow (16%), followed by changing their package or service (12%), in terms of upgrading or downgrading it. Around one in twenty (5%) or fewer customers contacted their provider for any other reason.

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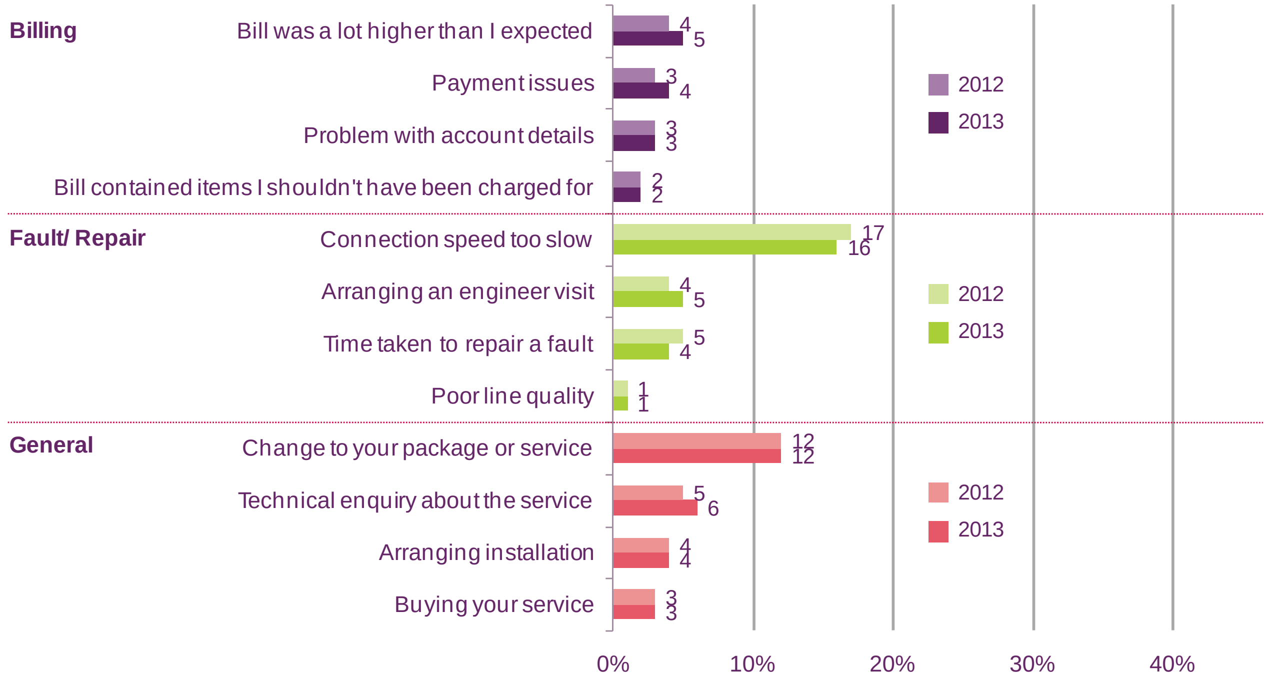
[26] Please note that the number of interviews conducted on the omnibus study among Sky and TalkTalk broadband customers are between 50 and 100 interviews and should therefore be treated as indicative only. The results for Orange broadband customers from the omnibus are not shown as they total under 50 interviews.

[27] Respondents were shown a different list of reasons to choose from dependent on whether they said their most recent contact was regarding a billing, fault and repair or general issue. To enable a comparison the data in Figure 33 is expressed as a proportion of all those that have contacted their broadband provider in the last 3 months.

There has been no change in the incidence of these reasons for contact compared with 2012.

Figure 33: Broadband – Top 4 issues per contact type: 2012 and 2013



S7a-c. And more specifically, which of the following best describes what the issue with [PROVIDER] was concerning? (prompted responses, single coded)
Base: All UK households contacting broadband provider (In 2013 – 1803 Total, In 2012 – 1903 Total)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013.

↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level.

Issue resolution

Compared to the sector overall, Virgin Media customers are more likely to feel their fault/ repair issue had been resolved

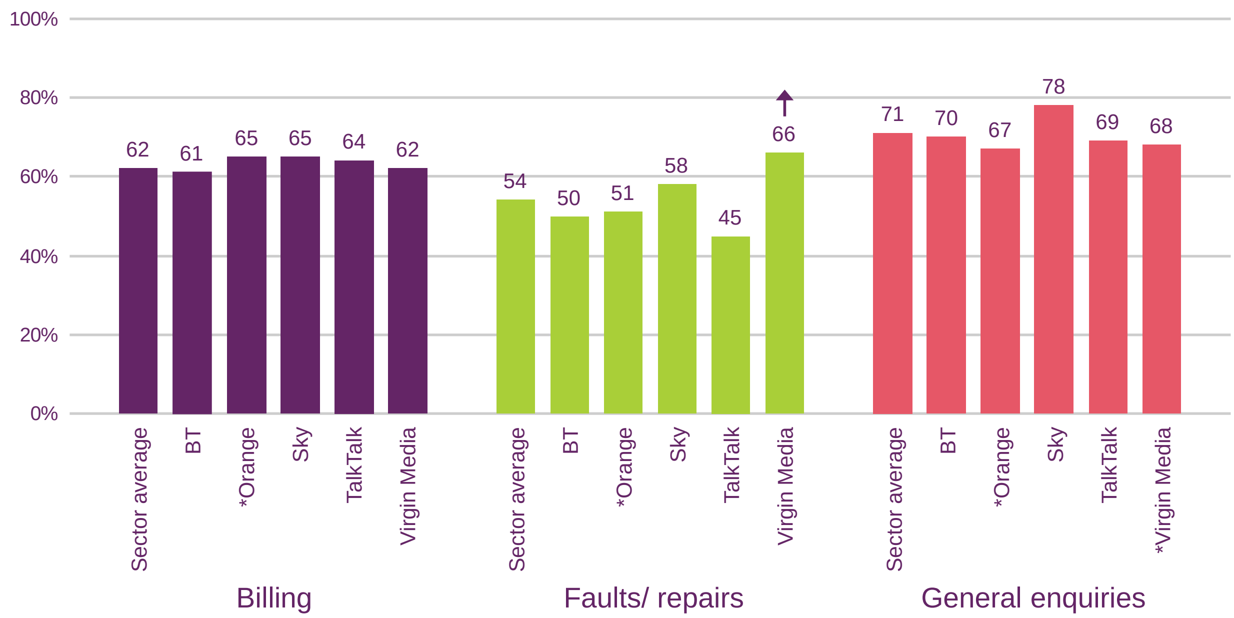
Those that had contacted their broadband provider were asked the extent to which they felt the issue they had contacted their provider about had been resolved. Respondents were given the choice of whether the issue had been fully resolved, partially resolved or if it was still unresolved (as defined by the respondent). Figure 34 below shows the proportions in 2013 who considered their issue completely resolved[28] by issue type for each provider. Figure 35 then shows any differences in these measures compared to 2012.

As shown in Figure 34, across the sector as a whole, a majority of customers contacting their broadband provider about each type of issue (billing/ fault or repair/ general enquiries) felt that this issue had been completely resolved. Resolution does however, vary by the type of issue as broadband providers are more likely to resolve general enquiries (71%) than they are to resolve either billing (62%) or fault or repair issues (54%).

[28] It was decided in 2013 to report on complete resolution as issues that are 'partly' resolved may go on to be completely resolved or may remain only partly resolved

In 2013, no individual provider performs better or worse than the sector average for billing or general enquiry issues. Virgin Media customers are more likely to say they have had a fault/ repair resolved compared to the sector overall (66% vs. 54% for the sector average).

Figure 34: Broadband - Whether the issue that the customer contacted their provider about was considered to be completely resolved, by provider: 2013



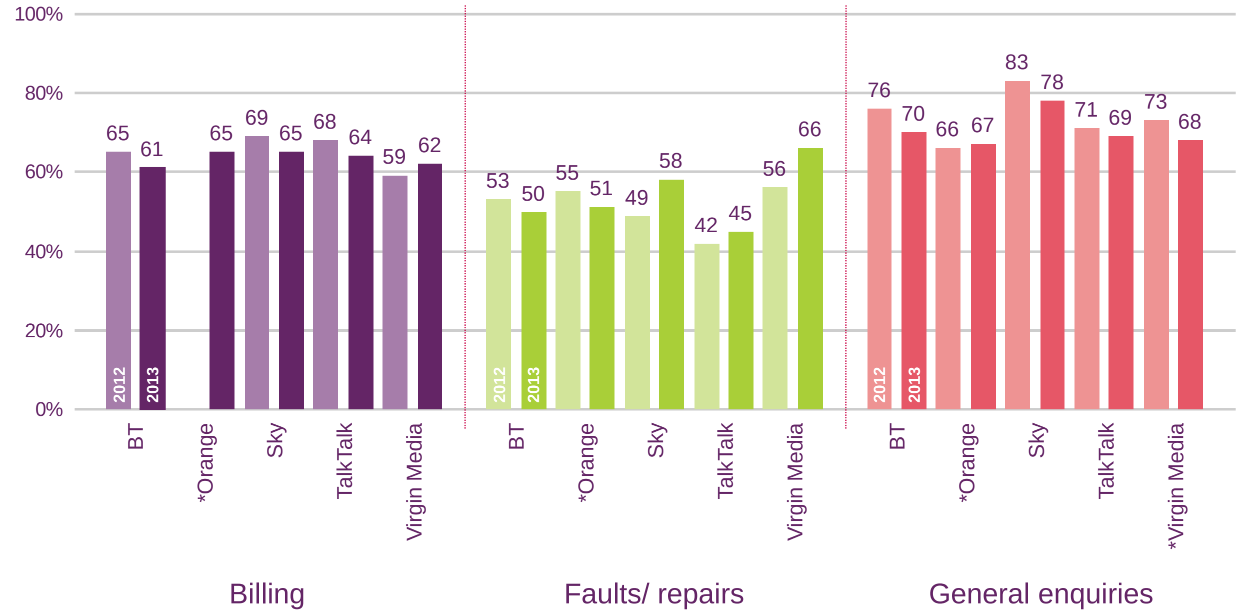
Q5. In your opinion, was [PROVIDER] able to successfully resolve your issue [BILLING/ FAULT/ GENERAL ENQUIRY]? (spontaneous responses, single coded)
Base: All UK households contacting broadband provider about each type of issue (In 2013 – For billing 477 Total, 107 BT, 52 Orange, 112 Sky, 106 TalkTalk, 100 Virgin Media, for faults/ repairs 785 Total, 145 BT, 88 Orange, 175 Sky, 168 TalkTalk, 209 Virgin Media, for general enquiries 541 Total, 152 BT, 55 Orange, 114 Sky, 128 TalkTalk, 92 Virgin Media) *Caution: Base below 100, **Base below 50, not reported
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013.

↑↓ indicates significantly higher/ lower than sector average at the 99% confidence level.

Figure 35 shows that, where it is possible to draw comparisons between 2012 and 2013, there has been no change in issue resolution by provider type.

While not shown in Figure 34 or Figure 35, those that contacted their broadband provider with a complaint are less likely to feel that their issue was resolved (51%) compared to those whose issue was not considered a complaint (76%).

Figure 35: Broadband - Whether the issue that the customer contacted their provider about was considered to be completely resolved, by provider: 2012 and 2013



Q5. In your opinion, was [PROVIDER] able to successfully resolve your issue [BILLING/ FAULT/ GENERAL ENQUIRY]? (spontaneous responses, single coded)
Base: All UK households contacting broadband provider about each type of issue (In 2013 – For billing 477 Total, 100 BT, 52 Orange, 112 Sky, 106 TalkTalk, 100 Virgin Media, for faults/ repairs 785 Total, 145 BT, 88 Orange, 175 Sky, 168 TalkTalk, 209 Virgin Media, for general enquiries 541 Total, 152 BT, 55 Orange, 114 Sky, 128 TalkTalk, 92 Virgin Media) *Caution: Base below 100, **Base below 50, not reported - includes Billing in 2012 for Orange.
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013.
↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level.

Number of contacts

Over half of customers contacting their broadband provider required more than one contact

Customers were asked how many times they had been in contact, so far, with their broadband provider about their most recent issue. Figure 36 shows the proportion that had only been in contact once with their broadband provider, at an overall sector level and by provider (between 2009 and 2013).

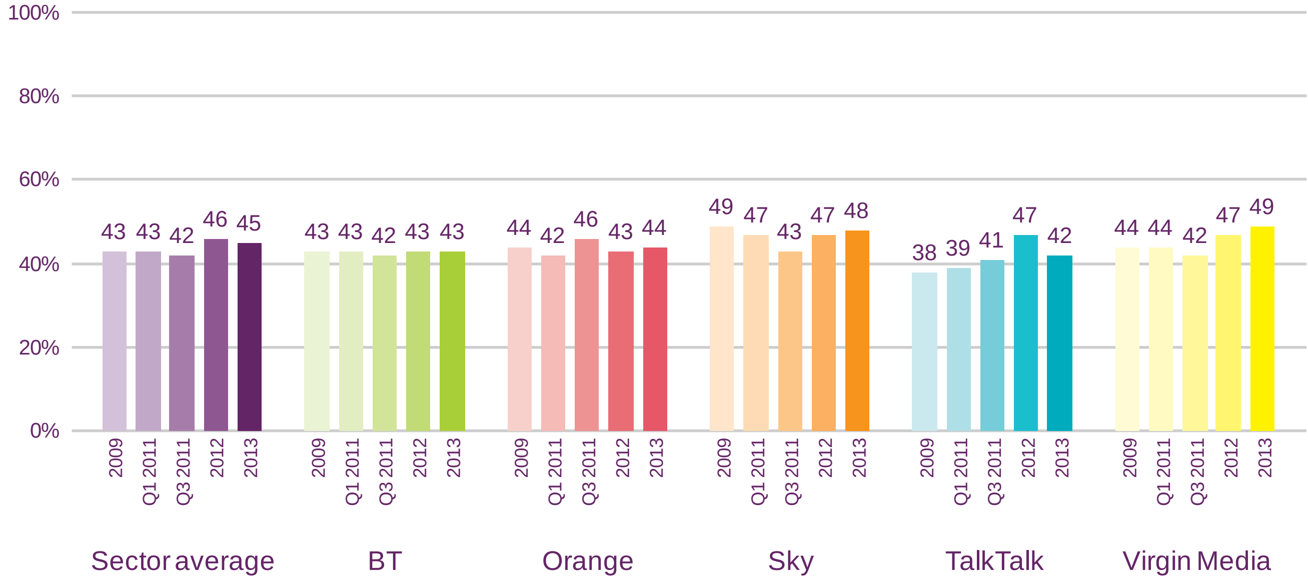
A minority of customers contacting any broadband provider only made contact on one occasion (45%), and the incidence does not vary in 2013 for any of the five providers compared to this sector average.

Since 2012, there has been no change in the proportion of customers who had only been in contact once with their broadband provider, either at on overall sector level or by provider.

Those customers who did not feel their issue was a complaint are more likely to have contacted their broadband provider only once compared to those making contact with a complaint (54% vs. 28% for those with a complaint).

Although not shown in Figure 36, the proportion of customers in contact once with their broadband provider stands at 59% among those who considered that their issue had been completely resolved. This overall measure does not differ across the broadband providers and there has been no change in this incidence since 2012 for any individual provider or the sector overall.

Figure 36: Proportion in contact one time with the provider – broadband: 2009, 2011, 2012 and 2013



PROVIDER LEVEL VS. 2013 SECTOR AVERAGE	=	=	=	=	=

Q6. How many times have you been in contact with [PROVIDER] in relation to this particular issue so far? (prompted responses, single coded)
Base: All UK households contacting broadband provider (In 2013 – 1803 Total, 404 BT, 195 Orange, 401 Sky, 402 TalkTalk, 401 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013.

↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level.

Overall satisfaction with customer service

While no provider stands out compared to the sector overall, Virgin Media customers are now more likely than in 2012 to be satisfied with the customer service received

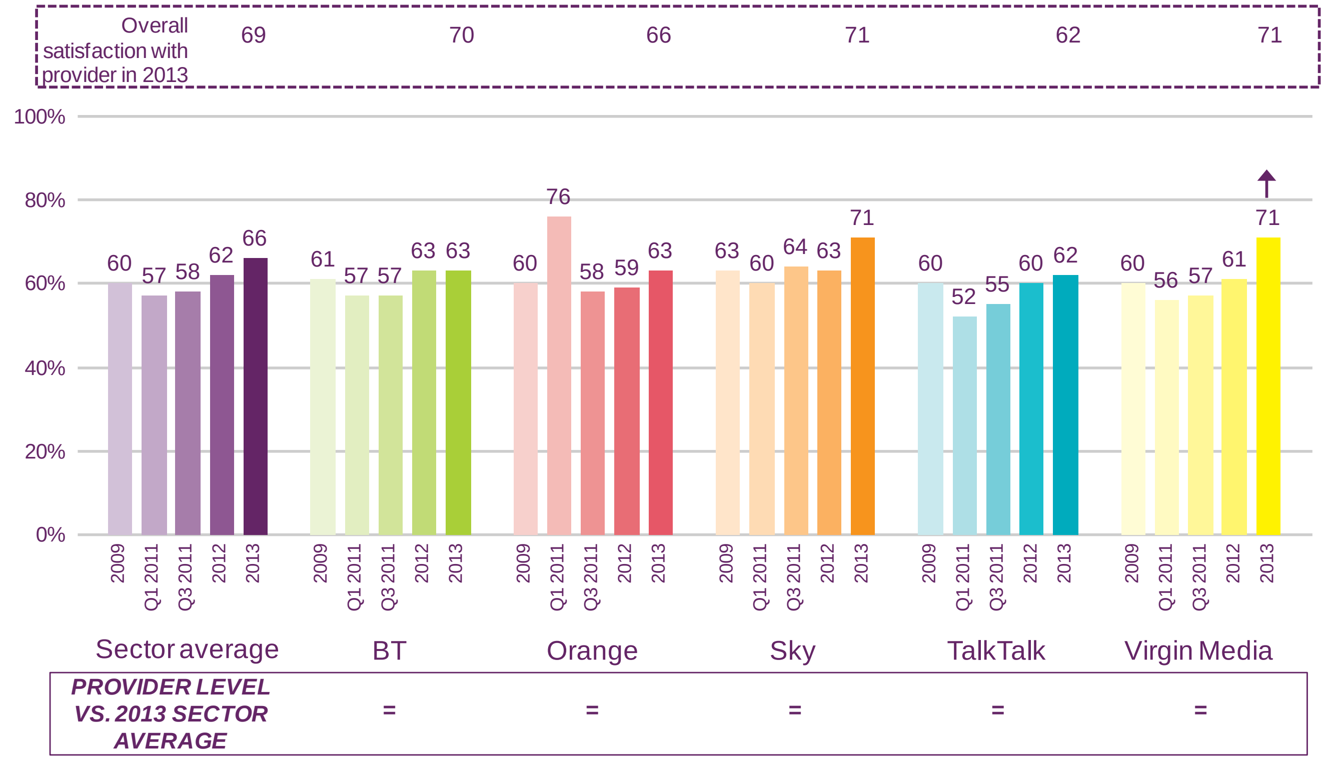
Figure 37 below shows levels of overall satisfaction with the broadband providers' customer service when the customer was recently in contact.

In 2013, two in three customers (66%) who contacted their broadband provider were satisfied with the customer service received. There are no differences in satisfaction for any provider compared to the sector overall.

Compared to 2012, Virgin Media broadband customers are more likely to say they are satisfied with the customer service received (71% vs. 61%). Results since 2012 are unchanged for the other broadband providers and for the sector overall.

Figure 37 below also shows levels of satisfaction with the broadband providers overall among those recently in contact. In 2013, two in three customers (69%) were satisfied overall with their broadband provider.

Figure 37: Satisfaction with customer service from provider – broadband: 2009, 2011, 2012 and 2013

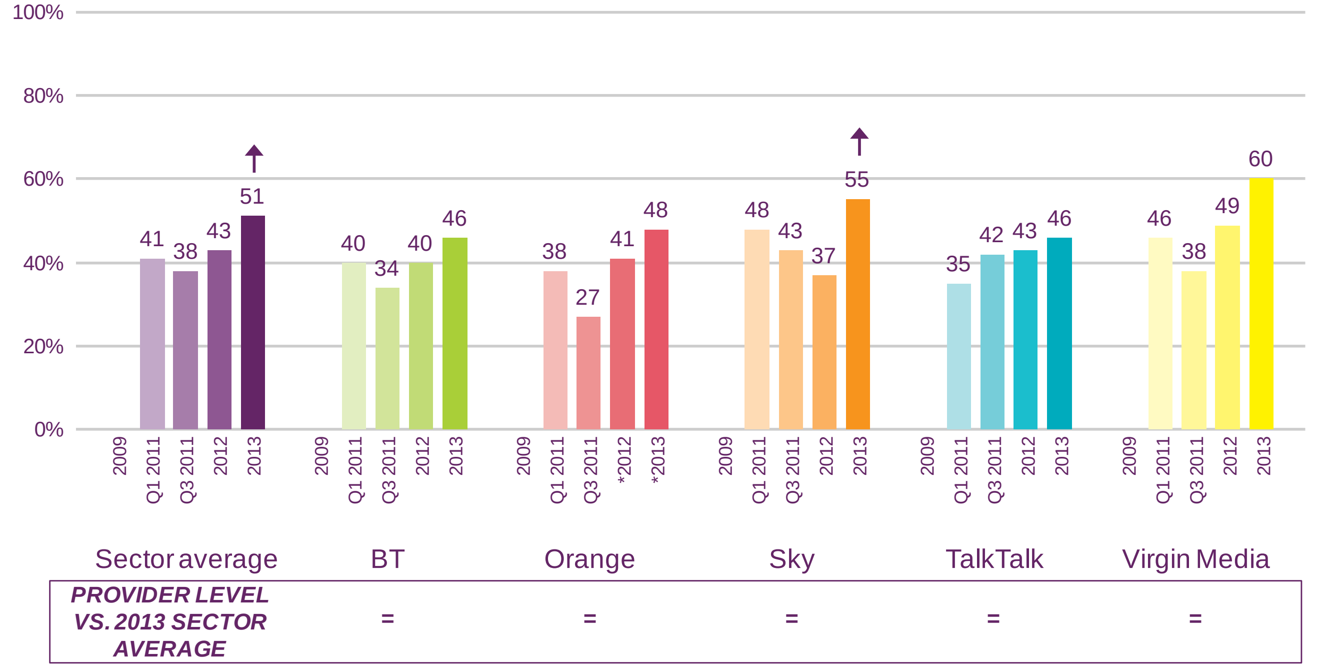


Q3. Overall how satisfied are you with the service you received from [PROVIDER] customer services on this occasion? (prompted responses, single coded)
Base: All UK households contacting broadband provider (In 2013 – 1803 Total, 404 BT, 195 Orange, 401 Sky, 402 TalkTalk, 401 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013.
↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level.

Figure 38 shows overall satisfaction with customer service among those customers who contacted their broadband provider with a complaint. Half of those (51%) who contacted their broadband provider with a complaint were satisfied with the customer service received. In 2013, this average for the sector does not vary by provider.

Since 2012, customers who contacted their broadband provider with a complaint are more likely to say they are satisfied (51% vs. 43% in 2012), continuing the upward trend noted last year. This rise in satisfaction is attributable to an increase among Sky customers (55% vs. 37%) following a period of decline for this provider.

Figure 38: Satisfaction with customer service from provider – broadband complaints: 2009, 2011, 2012 and 2013



Q3. Overall how satisfied are you with the service you received from [PROVIDER] customer services on this occasion? (prompted responses, single coded)
Base: All UK households contacting broadband provider with a complaint (In 2013 – 657 Total, 139 BT, 65 Orange, 146 Sky, 158 TalkTalk, 149 Virgin Media) *Caution: Base below 100
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013.

↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level.

Satisfaction with contacting customer service

Broadband customers who have contacted their provider are more likely than in 2012 to be satisfied with their provider calling them back when they said they would

Customers who had contacted their broadband provider (either by phone or email) were asked to rate their satisfaction with various aspects of their provider's customer services on a 10 point scale; where 10 is extremely satisfied and 1 is extremely dissatisfied.

Figure 39 below shows the percentage of customers stating that they were satisfied (giving a rating of 7-10) for three measures relating to contacting customer services.[29]

In 2013, among all those who contacted their broadband provider, satisfaction is highest for ease of finding provider contact details (68%) and lowest for calling back when they said they would (43%). Results do not vary for either of these measures by individual provider compared to the sector averages.

A majority of those who contacted their broadband provider by phone were satisfied with the ease of getting through to the right person (59%), with higher satisfaction among those customers contacting Sky (69%) or Virgin Media (69%).

[29] 'Measure 3: Ease of getting through to the right person' was asked of those who contacted customer services by phone.

Since 2012, there has been an increase in the proportion of customers who are satisfied with their broadband provider calling them back when they said they would (43% vs. 36%). This increase in the sector average is attributable to an increase among TalkTalk (40% vs. 31% in 2012) and Virgin Media customers (43% vs. 30% in 2012). While there has been no change since 2012 in the sector average for satisfaction with ease of getting through to the right person, Virgin Media customers are more likely to say they are satisfied for this measure (69% vs. 60% in 2012).

Figure 39: Satisfaction with contacting customer service

% satisfied (giving a rating of 7-10)	Sector average		BT		Orange		Sky		TalkTalk		Virgin Media	
Measure 1	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Ease of finding provider contact details	67	68	65	65	66	70	69	70	66	64	72	73
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		=		=		=
Measure 2	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Calling you back when they said they would	36	43↑	42	42	40	46	41	47	31	40↑	30	43↑
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		=		=		=
Measure 3	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Ease of getting through to the right person (phone only)	57	59	55	52	59	58	61	69	53	55	60	69↑
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		*H*		=		*H*

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 (prompted responses, single coded)
Base: All UK households contacting broadband provider / contacting by phone (In 2013 – 1803/ 1682 Total, 404/ 370 BT, 195/ 184 Orange, 401/ 370 Sky, 402/ 373 TalkTalk, 401/ 385 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013

↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level
=/ H/ L indicates that the provider's measure does not differ/ is higher/ is lower compared to the sector average in 2013

Satisfaction with speed of customer service

Three in five customers continue to be satisfied with the speed of customer services

Error! Reference source not found. below shows the percentage of customers stating that they were satisfied (giving a rating of 7-10) with two specific measures relating to the speed of customer service[30].

[30] 'Measure 1: Speed of answering the phone' was asked of those who contacted customer services by phone.

Three in five customers who contacted their broadband provider were satisfied with both the speed of answering the phone (59%) and the time taken to handle the issue (59%). In 2013, results do not vary by broadband provider against the sector average for the speed of answering the phone. Virgin Media customers are, however more likely to say they are satisfied with the time taken to handle the issue compared to the sector overall (68% vs. 59%).

There have been no changes in the sector average since 2012 for either measure. Virgin Media customers are, however now more likely to say they are satisfied with the time taken to handle the issue (68% vs. 59% in 2012).

Figure 40: Satisfaction with the speed of customer service

% satisfied (giving a rating of 7-10)	Sector average		BT		Orange		Sky		TalkTalk		Virgin Media	
Measure 1	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Speed of answering phones (phone only)	57	59	55	55	65	56	62	65	57	56	57	65
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		=		=		=
Measure 2	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
The time taken to handle issue	57	59	56	55	54	59	61	66	56	55	59	68↑
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		=		=		*H*

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 (prompted responses, single coded)
Base: All UK households contacting broadband provider / contacting by phone (In 2013 – 1803/ 1682 Total, 404/ 370 BT, 195/ 184 Orange, 401/ 370 Sky, 402/ 373 TalkTalk, 401/ 385 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013

↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level

=/ H/ L indicates that the provider's measure does not differ/ is higher/ is lower compared to the sector average in 2013

Satisfaction with advice from customer service

In 2013, Sky customers are the most likely to say they are satisfied that the advice was easy to understand, with higher ratings since 2012 from Virgin Media customers for other advice measures

Customers contacting their broadband provider in the three months prior to the interview were asked to rate their satisfaction with three aspects relating to the standard of advice from their broadband provider (Figure 41).

Satisfaction with the standard of advice from the broadband provider's customer service is consistent across each of its three constituent elements. At least three in five customers were satisfied that the advice/ information was easy to understand (64%), useful (62%), and with getting the issue resolved to their satisfaction (62%). In 2013, Sky broadband customers are more likely to say they are satisfied that the advice/ information was easy to understand compared to the sector overall (71% vs. 64%).

While there has been no change since 2012 in the overall sector average scores for any of these measures, Virgin Media broadband customers are now more likely to say they are satisfied that the advice/ information was useful (68% vs. 58% in 2012) and in getting the issue resolved to their satisfaction (67% vs. 58%).

Figure 41: Satisfaction with the standard of advice from customer service

% satisfied (giving a rating of 7-10)	Sector average		BT		Orange		Sky		TalkTalk		Virgin Media	
Measure 1	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Advice/ information was easy to understand	62	64	63	61	60	60	65	71	59	58	63	70
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		*H*		=		=
Measure 2	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Advice/ information was useful	59	62	60	59	54	61	63	66	58	57	58	68↑
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		=		=		=
Measure 3	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Getting the issue resolved to your satisfaction	60	62	60	60	53	61	63	67	63	59	58	67↑
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		=		=		=

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 (prompted responses, single coded)
Base: All UK households contacting broadband provider (In 2013 – 1803 Total, 404 BT, 195 Orange, 401 Sky, 402 TalkTalk, 401 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013

↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level

=/ H/ L indicates that the provider's measure does not differ/ is higher/ is lower compared to the sector average in 2013

Satisfaction with customer service advisor

In 2013, Sky performs above the sector average for three of the six customer service advisor measures, with higher ratings since 2012 from Virgin Media customers for five of the six measures

Customers contacting their broadband provider in the three months prior to the interview were asked to rate their satisfaction with the customer service advisor for six individual measures. These measures are shown across Figure 42 and Figure 43.

In 2013 for the broadband sector overall, satisfaction is highest for courtesy and politeness of advisors (76%) and lowest for the advisor logging query details to avoid having to repeat yourself (58%). In 2013 compared to the sector average overall, Sky broadband customers are more satisfied for three measures: ability to understand the issue and identify the problem (73% vs. 64% overall) keeping you informed throughout the process (70% vs. 63%) and doing what they said they would do (73% vs. 66%). Virgin Media customers are also more likely to be satisfied in the advisor's ability to understand the issue and identify the problem, compared to the sector overall (72% vs. 64%). In contrast, TalkTalk customers are less satisfied in 2013 for the advisor logging query details (50% vs. 58% overall).

Since 2012, however, satisfaction has increased for the measure relating to the advisor logging query details to avoid having to repeat yourself (58% vs. 53% in 2012), with this increase attributable to an increase among Virgin Media customers (65% vs. 54%). While the overall broadband sector score has not increased since 2012 for any of the other measures relating to satisfaction with the customer service advisor, there are a further four measures where Virgin Media customers are now more satisfied: ability to understand the issue and identify the problem (72% vs. 60% in 2012), the advisor took my questions/ issue seriously (74% vs. 66%), keeping you informed throughout the process (69% vs. 58%) and the advisor doing what they said they would do (72% vs. 62%). For the other broadband providers, satisfaction with the customer service advisor across each of the measures is unchanged compared to 2012.

Figure 42: Satisfaction with the customer service advisor

% satisfied (giving a rating of 7-10)	Sector average		BT		Orange		Sky		TalkTalk		Virgin Media	
Measure 1	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Courtesy and politeness of advisers	73	76	78	76	71	75	76	80	67	71	72	79
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		=		=		=
Measure 2	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Adviser ability to understand the issue and identify the problem	60	64	61	60	59	64	67	73	55	58	60	72↑
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		*H*		=		*H*
Measure 3	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Adviser took my questions/ issue seriously	68	70	71	67	62	68	71	75	65	66	66	74↑
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		=		=		=

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 (prompted responses, single coded)
Base: All UK households contacting broadband provider (In 2013 – 1803 Total, 404 BT, 195 Orange, 401 Sky, 402 TalkTalk, 401 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in

↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level

=/ *H*/ *L* indicates that the provider's measure does not differ/ is higher/ is lower compared to the sector average in 2013

Figure 43: Satisfaction with the customer service advisor/ 2

% satisfied (giving a rating of 7-10)	Sector average		BT		Orange		Sky		TalkTalk		Virgin Media	
Measure 4	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Keeping you informed throughout the process	59	63	59	60	61	62	65	70	56	60	58	69↑
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		*H*		=		=
Measure 5	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Adviser doing what they said they would do	62	66	63	62	63	66	69	73	58	63	62	72↑
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		*H*		=		=
Measure 6	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Logging of query details to avoid having to repeat yourself	53	58↑	53	56	52	51	61	65	48	50	54	65↑
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		=		*L*		=

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 (prompted responses, single coded)
Base: All UK households contacting broadband provider (In 2013 – 1803 Total, 404 BT, 195 Orange, 401 Sky, 402 TalkTalk, 401 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in

↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level

=/ *H*/ *L* indicates that the provider's measure does not differ/ is higher/ is lower compared to the sector average in 2013

Satisfaction with other aspects of customer service

There has been an increase in satisfaction for offering compensation or a goodwill payment, and in willingness to help resolve the issue

Figure 44 shows the percentage of satisfied customers for more general customer service attributes. While most customers who contacted their broadband provider were satisfied with the willingness to help resolve the issue (67%), fewer were satisfied with the provider offering compensation or a goodwill payment (32%). Compared to the sector overall BT customers are less likely to be satisfied with the provider offering compensation or a goodwill payment (24% vs. 32% overall) while Sky customers and Virgin Media customers are more likely to say they are satisfied (43% for Sky and 40% for Virgin Media vs. 32%).

Compared to 2012, there has been an increase in satisfaction for offering compensation or a goodwill payment (32% vs. 23%); with this due to an increase in satisfaction among Sky customers (43% vs. 27%) and Virgin Media customers (40% vs. 25%). There has also been an increase in the willingness to help resolve the issue (67% vs. 62%), driven by an increase in this measure among Virgin Media customers (72% vs. 63%).

Figure 44: Satisfaction with other aspects of customer service

% satisfied (giving a rating of 7-10)	Sector average		BT		Orange		Sky		TalkTalk		Virgin Media	
Measure 1	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Offering compensation or a goodwill payment	23	32↑	20	24	26	32	27	43↑	23	31	25	40↑
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				*L*		=		*H*		=		*H*
Measure 2	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Willingness to help resolve your issue	62	67↑	62	65	64	65	67	72	58	61	63	72↑
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		=		=		=

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 (prompted responses, single coded)
Base: All UK households contacting broadband provider (In 2013 – 1803 Total, 404 BT, 195 Orange, 401 Sky, 402 TalkTalk, 401 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in

↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level

=/ *H*/ *L* indicates that the provider's measure does not differ/ is higher/ is lower compared to the sector average in 2013

Future use of provider based on experience

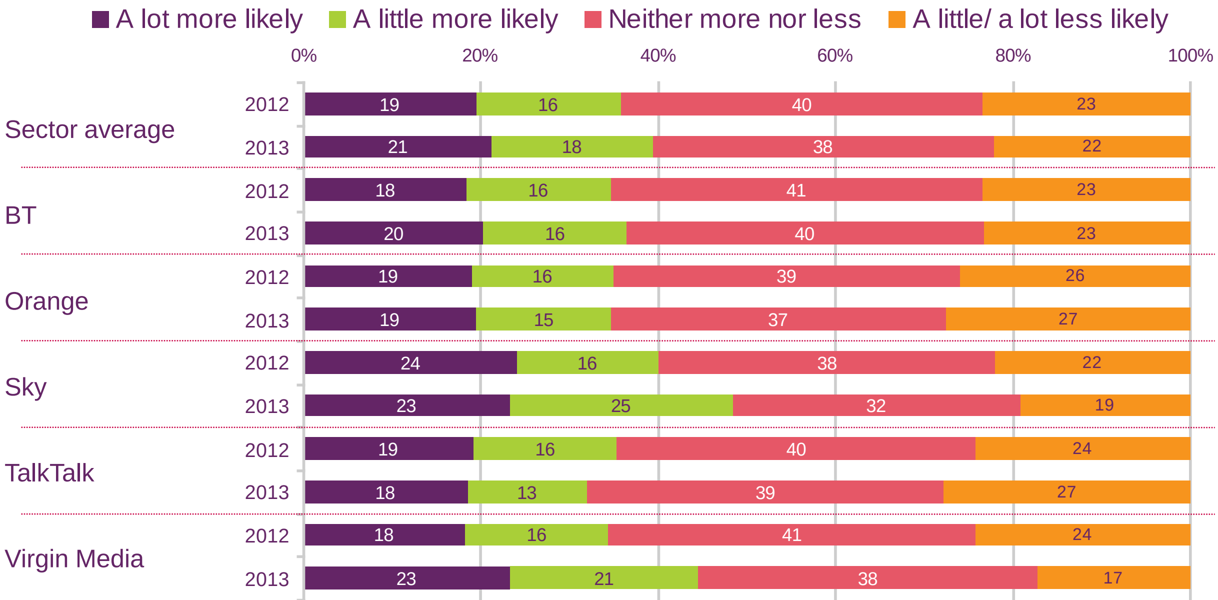
Likelihood of using a broadband provider as a result of their recent customer service experience is unchanged since 2012

Customers contacting their broadband provider were asked whether their most recent customer service experience has made them more or less likely to use their broadband provider in the future. Results are shown at an overall level and by provider for 2012 and 2013 in Figure 45.

Compared to 2012, there has been no change in the likelihood of future use for the sector as a whole or for any individual broadband provider.

Among all customers contacting their broadband provider, one in five said they were now a lot more likely to use their broadband provider again (21%) with a similar proportion saying they were now a little or a lot less likely (22%). In 2013, there were no differences in these measures for any broadband provider compared to these sector averages.

Figure 45: Future use of provider given customer service experience - broadband: 2012 and 2013



Q7. Has your experience of [PROVIDER]'s customer service for this issue made you more or less likely to use [PROVIDER] in the future? (prompted responses, single coded)
Base: All UK households contacting broadband provider (In 2013 – 1803 Total, 404 BT, 195 Orange, 401 Sky, 402 TalkTalk, 401 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013.

↑↓ indicates significantly higher/ lower for 'A lot more likely' or 'less likely' compared to 2012 at the 99% confidence level.

Section 6

Mobile phone sector

This section looks in detail at the mobile phone sector. It shows, where possible, how each provider included (3/Three, O2, Orange, T-Mobile, Virgin Mobile and Vodafone) performs against key measures such as:

- incidence of contact about mobile
- incidence of complaints
- issue type
- whether the issue was completely resolved
- satisfaction with customer service
- future use based on customer service experience

For each measure this section shows how the provider performs in 2013 against the overall mobile network sector average. This section also shows, where possible, how the sector average and the provider-specific measures in 2013 compare to those in 2012. The longer term trend is also reported.

We continue to report satisfaction with customer services for Orange and T-Mobile customers separately, and will continue to do so until such a time that these two brands are fully merged. Customer satisfaction among EE customers will be included when this brand reaches the threshold for inclusion.[31].

Recent contact with provider

Compared to 2012, there has been an increase in customers contacting their mobile phone provider in the three months prior to the interview

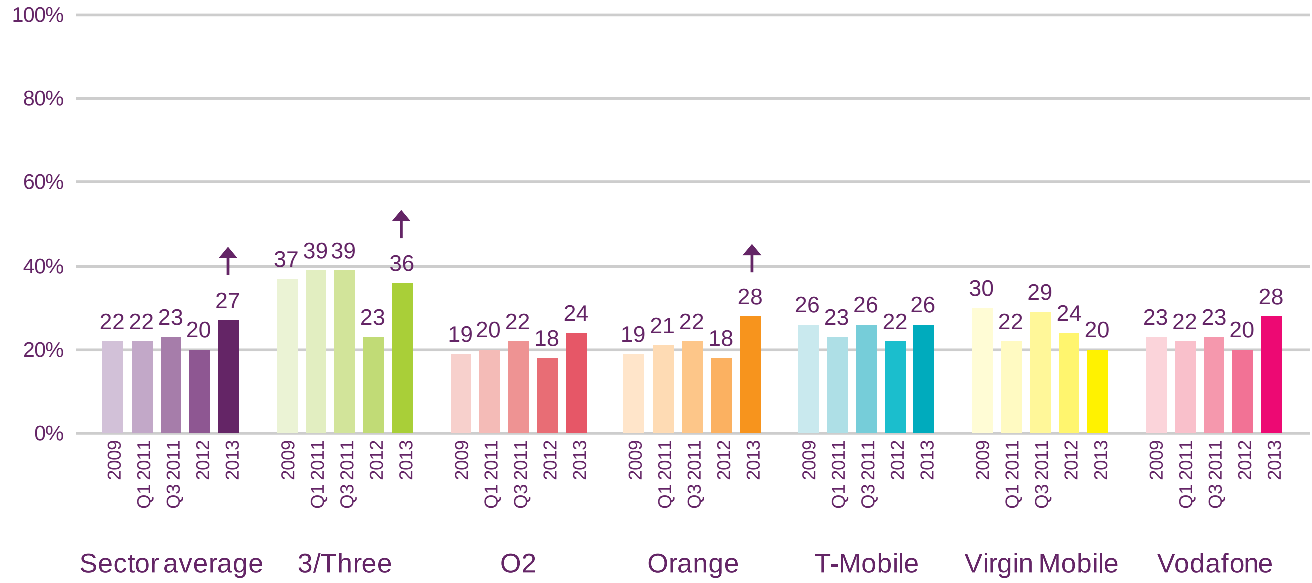
Figure 46 below shows the proportion of customers that have made contact (by telephone or email), in the three months prior to the interview[32], with any of the six mobile phone network providers. This contact was either regarding a specific issue relating to their mobile phone or a more general issue that applies to all the services they may take with that provider.[33]

In 2013, one in four (27%) of all UK households using one of the six mobile phone network providers had contacted their provider in the three months prior to the interview. This measure does not differ by network provider compared to the sector average[34].

[31] When the 2013 fieldwork commenced EE had less than 4% market share.
[32] With the data from this measure coming from the omnibus study this means that the contact was between May and July 2013
[33] So for example, if a customer has their mobile phone and broadband service provided by Virgin and they did not say their most recent contact was regarding the mobile phone specifically, then they were asked whether it was a general issue that applies to both their mobile phone and broadband service
[34]This is indicated by the '=' symbols appearing for each provider in the box below the chart within Figure 46. This convention is included across several of the Figures in this and subsequent sections. If in 2013, for a given measure a provider performs

Since 2012, there has been an increase in overall contact to any mobile phone network provider (27% vs. 20% in 2012) with this change attributable to an increase among 3/Three customers (36% vs. 23% in 2012) and to a lesser extent among Orange customers (28% vs. 18%). Other providers also show an apparent rise in contacts, but these are not significantly different to those reported in 2012. It is worth noting however, that the increase in contacts in 2013 for 3/Three follows a significant decrease in contacts in 2012. The incidence for contacts for 3/Three in 2013 is therefore comparable to the level seen in Q3 2011.

Figure 46: Proportion of customers that had contacted their mobile phone network provider in the three months prior to the interview: 2009, 2011, 2012 and 2013



PROVIDER LEVEL VS. 2013 SECTOR AVERAGE	3/Three	O2	Orange	T-Mobile	Virgin Mobile	Vodafone
	=	=	=	=	=	=

Q6. Thinking of [PROVIDER] and the services you buy from them, have you contacted them in the last 3 months by telephone or email? (spontaneous responses, single coded)
Base: All UK households using mobile phone network providers (In 2013 – 2285 Total, 168 3/Three, 652 O2, 524 Orange, 270 T-Mobile, 175 Virgin Mobile, 496 Vodafone)
Source: Ofcom research, omnibus survey, fieldwork carried out by Saville Rossiter-Base in August and September 2013.

↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level.

Proportion of complaints

There has been no change in the proportion of contacts with mobile phone providers considered to be complaints since 2012

Since the 2011 surveys, those customers that have contacted their mobile phone network provider (in the previous three months)[35] are asked whether they considered the reason for this contact to be a complaint[36]. Figure 47 shows that overall one in four contacts (26%) are considered to be complaints. As with overall contact (shown in Figure 46), this incidence does not vary in 2013 for any of the six network providers compared to the sector average.

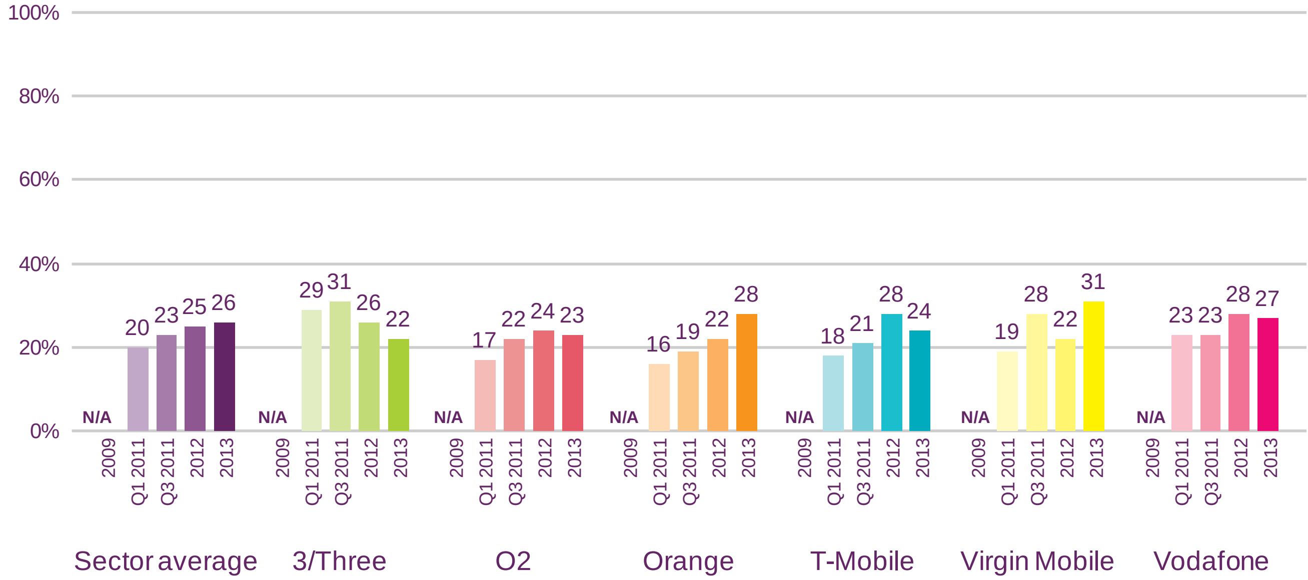
better than the sector average the box below the chart will show *'HIGHER'* for that particular provider and if a provider performs worse then it will show *'LOWER'*

[35]With the data for this measure coming from the online study this means that the contact was between July and September 2013

[36] Respondents were not prompted with a definition of a complaint, this was therefore self- defined by the respondent

Unlike overall contact (shown in Figure 46) there has been no change since 2012 in the proportion of contacts considered to be complaints for the mobile phone sector overall. There has also been no change since 2012 in the proportion that are complaints for any of the six mobile phone network providers.

Figure 47: Proportion of customers who contacted their provider in the three months prior to the interview with a complaint–mobile phone network provider: 2009, 2011, 2012 and 2013



	3/Three	O2	Orange	T-Mobile	Virgin Mobile	Vodafone
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE	=	=	=	=	=	=

Q5a. And in your opinion, was the reason for this contact with [PROVIDER] a complaint, or something else? (prompted responses, single coded)
Base: All UK households contacting mobile phone network provider (In 2013 – 2002 Total, 200 3/Three, 400 O2, 400 Orange, 401 T-Mobile, 201 Virgin Mobile, 400 Vodafone)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013.

↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level.

Most recent contact by issue type

There has been no change since 2012 in the type of issue that customers are contacting their mobile phone network provider about

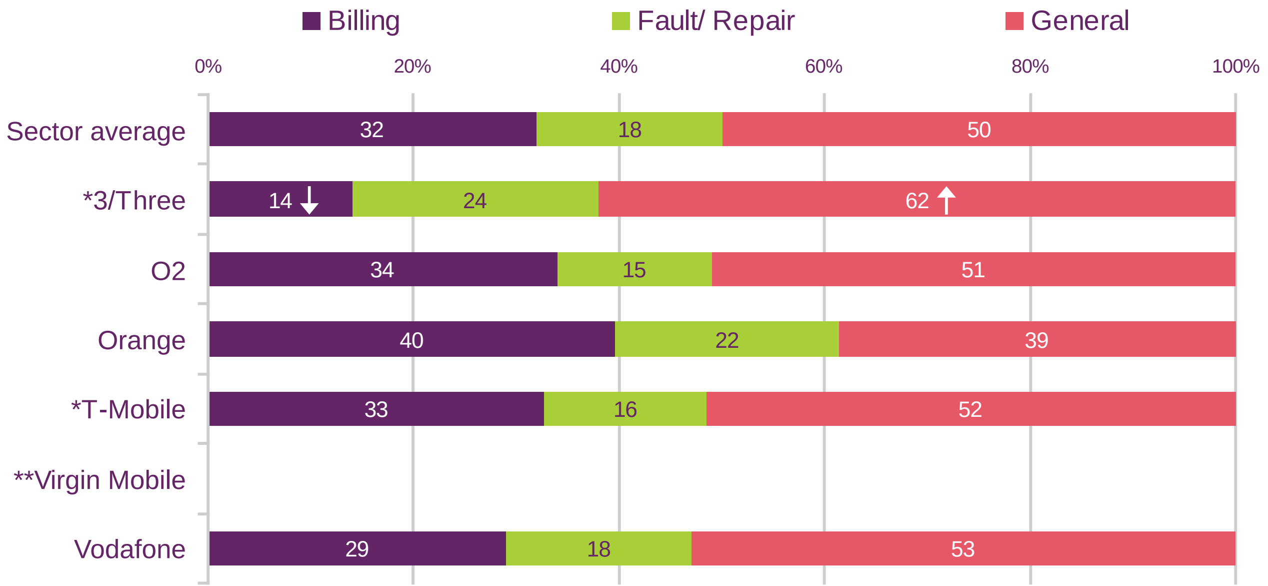
Customers were prompted with a list of seven possible reasons for contacting their mobile phone network provider, and asked to say which one reason applied for their most recent contact. These seven possible responses were then grouped into three distinct categories: a billing issue, a fault or repair issue or a general enquiry issue.

Figure 48 below shows the incidence of the three types of issue in 2013. Across all mobile phone network providers, half of all contacts (50%) relate to a general enquiry, one in three a billing issue (32%) and close to one in five contacts (18%) relate to a fault or repair. Within the mobile phone sector overall it is therefore more common for recent contact to be about a general enquiry issue than about either a fault/repair or a billing issue.

In 2013 recent customer contact about a general enquiry is more likely for 3/Three customers compared to the sector overall (62% vs. 50%) while contact about a billing issue is less likely (14% vs. 32%)[37].

Since 2012, where base sizes allow the comparison, there has been no change in the type of issue mobile phone network providers are contacted about.

Figure 48: Type of issue for most recent contact with mobile phone network provider: 2013



Q8. Thinking of the most recent issue you had to contact [PROVIDER] about, which one of the following categories did the issue fall into? Was it to do with..... ? (prompted responses, single coded)
Base: All UK households contacting mobile phone network provider (In 2013 – 600 Total, 60 3/Three, 159 O2, 138 Orange, 73 T-Mobile, 34 Virgin Mobile, 136 Vodafone) *Caution: Base below 100, **Base below 50, not reported
Source: Ofcom research, omnibus survey, fieldwork carried out by Saville Rossiter-Base in August and September 2013.

↑↓ indicates significantly higher/ lower than sector average at the 99% confidence level.

Key issues by contact type

The most common reason for contacting the mobile phone network provider is to make a change to the package or service

Figure 49 shows the top four reasons for recent contact with service providers, by each issue type[38]. No single reason accounts for a majority of contacts from mobile phone network customers to their provider in 2013, as in 2012.

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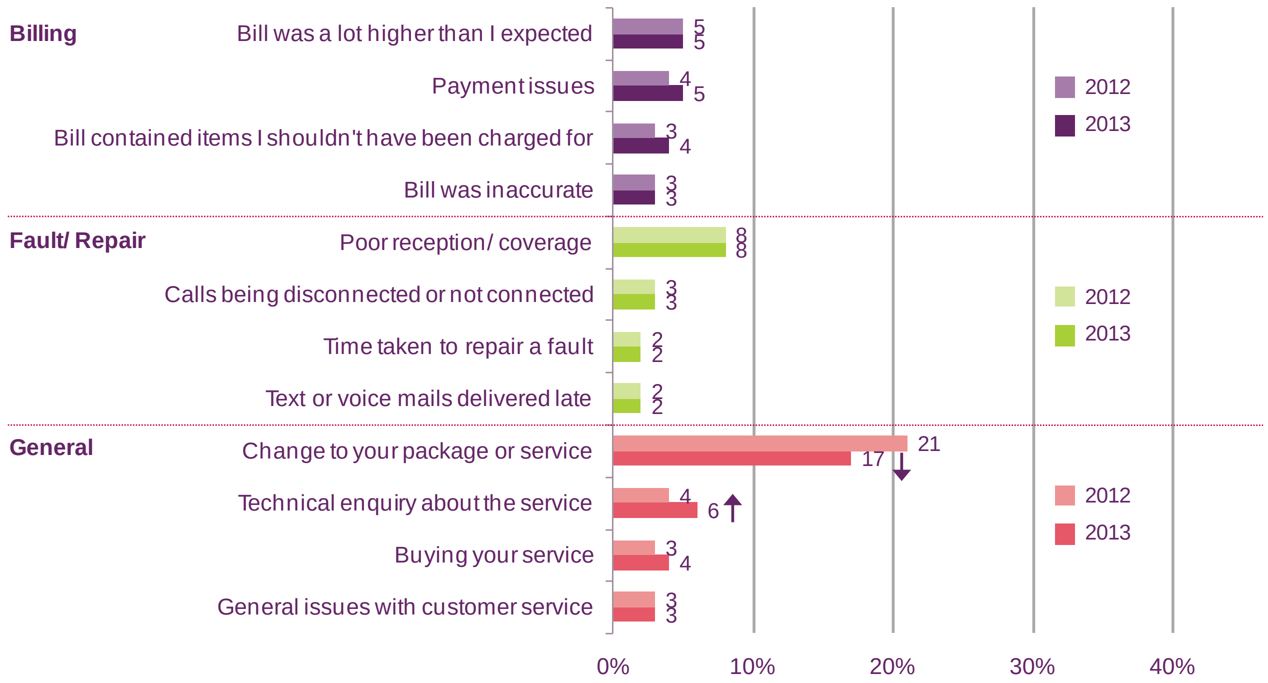
[37] Please note that the number of interviews conducted on the omnibus study among 3/Three and T-Mobile customers are between 50 and 100 interviews and should therefore be treated as indicative only. The results for Virgin Mobile customers from the omnibus are not shown as they total under 50 interviews.
[38] Respondents were shown a different list of reasons to choose from dependent on whether they said their most recent contact was regarding a billing, fault and repair or general issue. To enable a comparison the data in Figure 49 is expressed as a proportion of all those that have contacted their mobile phone network provider in the last 3 months.

The most commonly mentioned reason for contacting their provider was to make a change to the package or service (17%) in terms of upgrading or downgrading it, followed by contact about poor reception/ coverage (8%) or a technical enquiry about the service (6%). Around one in twenty (5%) or fewer customers contacted their provider for any other reason.

Compared with 2012, contact about changing package or service is less likely (17% vs. 21% in 2012) while making a technical enquiry about the service is more likely (6% vs. 4%).

Figure 49: Mobile phone – Top 4 issues per contact type: 2012 and 2013



S7a-c. And more specifically, which of the following best describes what the issue with [PROVIDER] was concerning? (prompted responses, single coded)
Base: All UK households contacting mobile phone network provider (In 2013 – 2002 Total, In 2012 – 2192 Total)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013.

↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level.

Issue resolution

Compared to the sector overall, O2 customers are more likely to feel their fault/ repair issue had been resolved

Those that had contacted their mobile phone network provider in the three months prior to interview were asked the extent to which they felt the issue they had contacted their provider about had been resolved. Respondents were given the choice of whether the issue had been fully resolved, partially resolved or if it was still unresolved (as defined by the respondent). Figure 50 below shows the proportions in 2013 who considered their issue completely resolved[39] by issue type for each provider. Figure 51 then shows any differences in these measures compared to 2012.

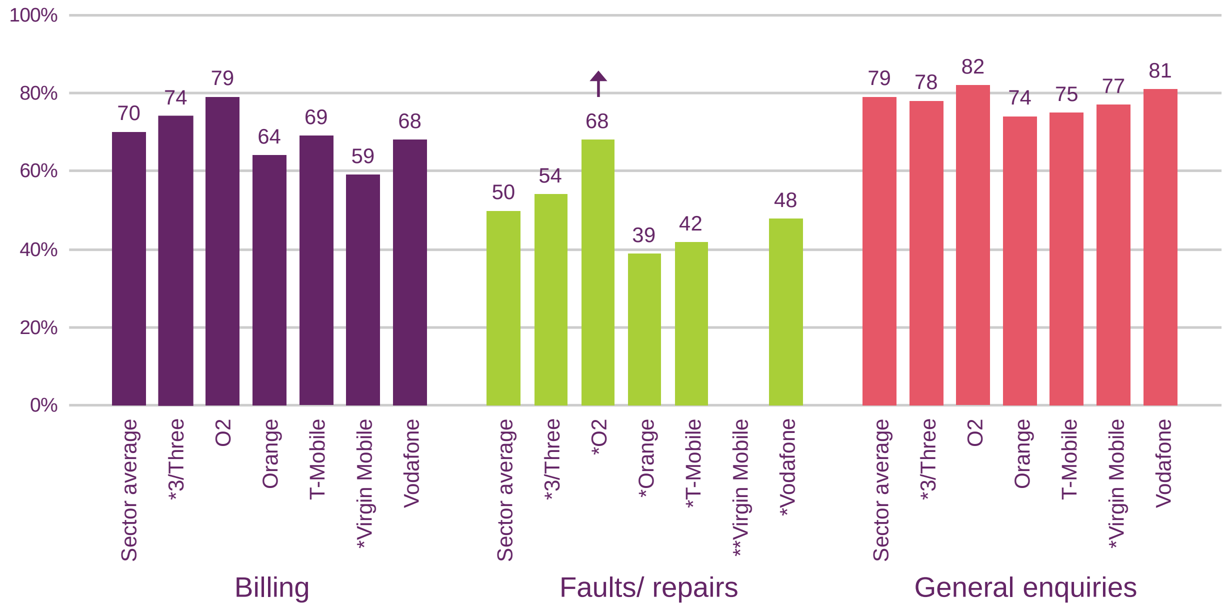
As shown in Figure 50, across the sector as a whole a majority of customers contacting their mobile phone network provider about a general enquiry or about billing felt that this issue had been completely resolved. One in two contacting about faults or repairs, felt that this issue had been completely resolved. As such mobile phone network providers are less likely to resolve fault or repair issues (50%) than they are to resolve either billing (70%) or general enquires (79%).

In 2013, no individual provider performs better or worse than the sector average for billing or general enquiry issues. O2 customers are more likely to have resolved a fault/ repair compared to the sector overall (68% vs. 50% for the sector average).

Figure 51 shows that, where it is possible to draw comparisons between 2012 and 2013, there has been no change in issue resolution by provider type.

While not shown in Figure 50 or Figure 51, those that contacted their mobile phone network provider with a complaint are less likely to feel that their issue was resolved (54%) compared to those whose issue was not considered a complaint (76%).

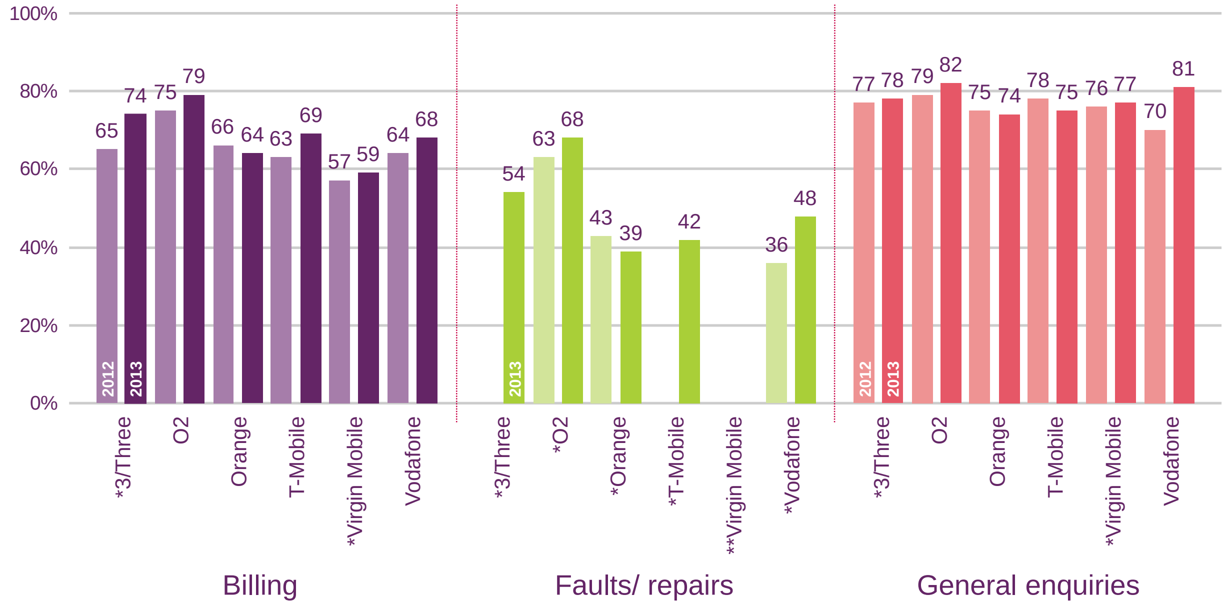
Figure 50: Mobile phone - Whether the issue that the customer contacted their provider about was considered to be completely resolved, by provider: 2013



Q5. In your opinion, was [PROVIDER] able to successfully resolve your issue [BILLING/ FAULT/ GENERAL ENQUIRY]? (spontaneous responses, single coded)
Base: All UK households contacting mobile phone network provider about each type of issue (In 2013 – For billing 783 Total, 62 3/Three, 154 O2, 177 Orange, 163 T-Mobile, 75 Virgin Mobile, 152 Vodafone, for faults/ repairs 416 Total, 59 3/Three, 97 O2, 74 Orange, 74 T-Mobile, 35 Virgin Mobile, 77 Vodafone, for general enquiries 803 Total, 79 3/Three, 149 O2, 149 Orange, 164 T-Mobile, 91 Virgin Mobile, 171 Vodafone) *Caution: Base below 100, **Base below 50, not reported
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013.
↑↓ indicates significantly higher/ lower than sector average at the 99% confidence level.

[39] It was decided in 2013 to report on complete resolution as issues that are 'partly' resolved may go on to be completely resolved or may remain only partly resolved

Figure 51: Mobile phone - Whether the issue that the customer contacted their provider about was considered to be completely resolved, by provider: 2012 and 2013



Q5. In your opinion, was [PROVIDER] able to successfully resolve your issue [BILLING/ FAULT/ GENERAL ENQUIRY]? (spontaneous responses, single coded)
Base: All UK households contacting mobile phone network provider about each type of issue (In 2013 – For billing 783 Total, 62 3/Three, 154 O2, 177 Orange, 163 T-Mobile, 75 Virgin Mobile, 152 Vodafone, for faults/ repairs 416 Total, 59 3/Three, 97 O2, 74 Orange, 74 T-Mobile, 35 Virgin Mobile, 77 Vodafone, for general enquiries 803 Total, 79 3/Three, 149 O2, 149 Orange, 164 T-Mobile, 91 Virgin Mobile, 171 Vodafone) *Caution: Base below 100, **Base below 50, not reported - includes Faults/ repairs in 2012 for 3/Three and T-Mobile.
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013.
↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level.

Number of contacts

A majority (70%) of customers whose contact had been resolved only required one contact with their mobile network provider

Customers were asked how many times they had been in contact, so far, with their mobile phone network provider about their most recent issue. Figure 52 shows the proportion that had only been in contact once with their mobile phone network provider, at an overall sector level and by provider (between 2009 and 2013).

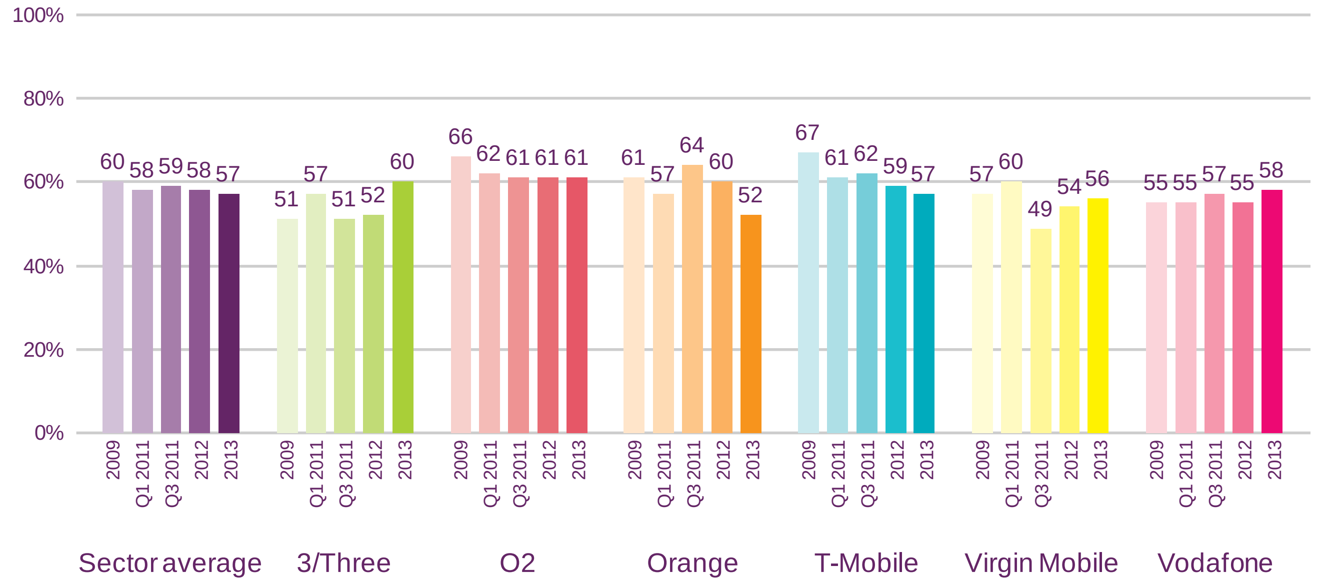
A majority (57%) of customers contacting any mobile phone network provider, only made contact on one occasion and the incidence does not vary in 2013 for any of the six providers compared to this sector average.

Since 2012, there has been no change in the proportion of customers who had only been in contact once with their mobile phone network provider, either at on overall sector level or by provider.

Those customers who did not feel their issue was a complaint are more likely to have contacted their mobile phone network provider only once compared to those making contact with a complaint (64% vs. 37% for those with a complaint).

Although not shown in Figure 52, the proportion of customers in contact once with their mobile network provider stands at 70% among those who considered that their issue had been completely resolved. This overall measure does not differ across the mobile network providers and there has been no change in this incidence since 2012 for any individual provider or the sector overall.

Figure 52: Proportion in contact one time with the provider – mobile phone: 2009, 2011, 2012 and 2013



	3/Three	O2	Orange	T-Mobile	Virgin Mobile	Vodafone
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE	=	=	=	=	=	=

Q6. How many times have you been in contact with [PROVIDER] in relation to this particular issue so far? (prompted responses, single coded)
Base: All UK households contacting mobile phone network provider (In 2013 – 2002 Total, 200 3/Three, 400 O2, 400 Orange, 401 T-Mobile, 201 Virgin Mobile, 400 Vodafone)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013.

↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level.

Overall satisfaction with customer service

Since 2012, mobile phone customers are more likely to be satisfied with the customer service received

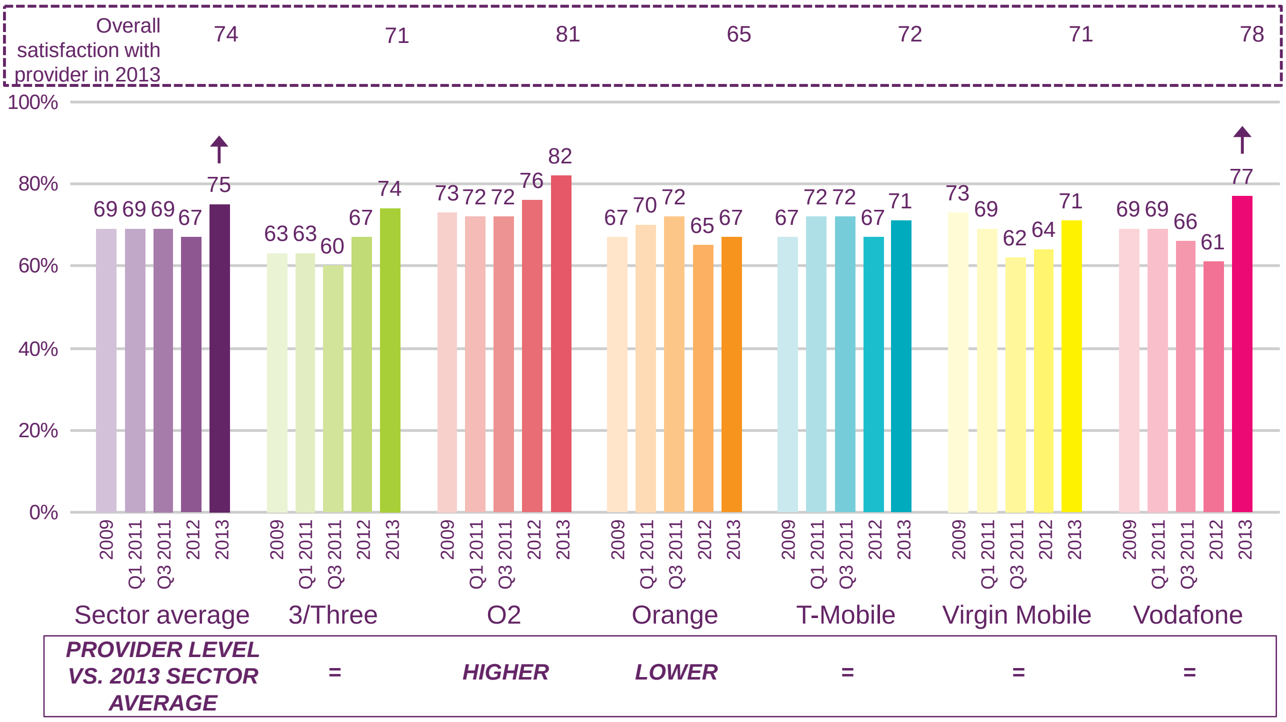
Figure 53 below shows levels of overall satisfaction with the mobile phone network providers when the customer was recently in contact.

In 2013, three in four customers (75%) who contacted their mobile phone network provider were satisfied with the customer service received. Compared to 2012, satisfaction with the customer service received has increased for the sector overall (75% vs. 67% in 2012), with this driven by an increase among Vodafone customers (77% vs. 61% in 2012). Results since 2012 are unchanged for the other mobile phone network providers.

Compared to the sector as a whole, O2 customers are more likely to be satisfied with their recent contact (82% vs. 75% for the sector as a whole) and Orange customers are less likely to be satisfied (67% vs. 75%).

Figure 53 below also shows levels of satisfaction with the mobile phone providers overall, among those recently in contact. In 2013, three in four customers (74%) were satisfied overall with their mobile phone providers.

Figure 53: Satisfaction with customer service from provider – mobile phone: 2009, 2011, 2012 and 2013



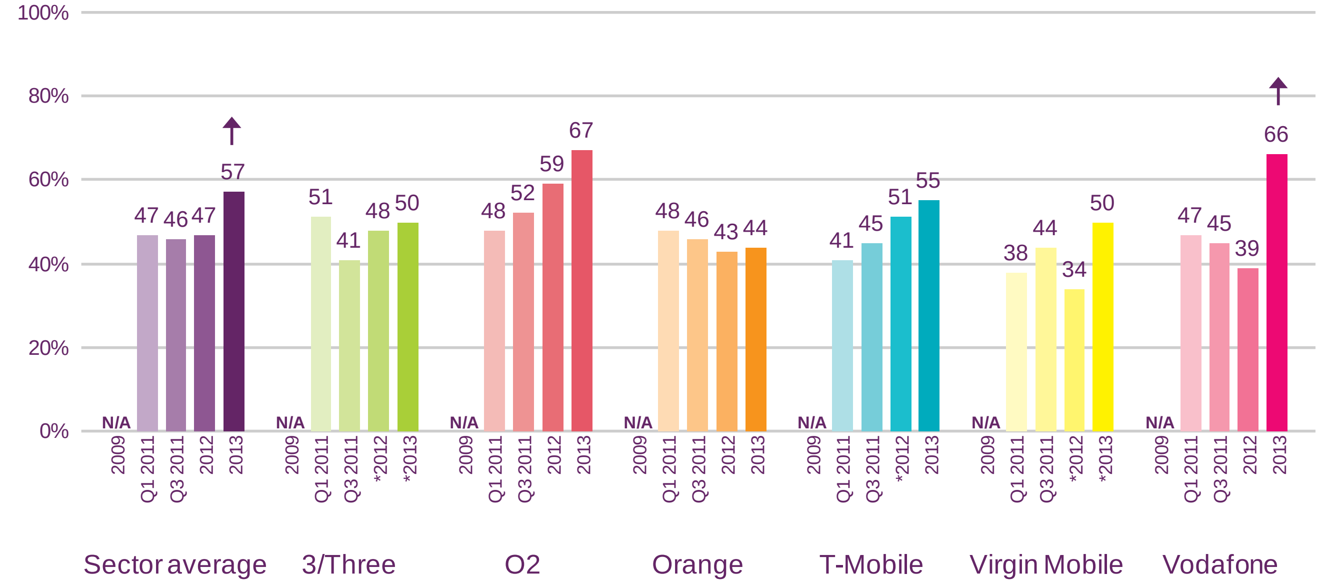
Q3. Overall how satisfied are you with the service you received from [PROVIDER] customer services on this occasion? (prompted responses, single coded)
Base: All UK households contacting mobile phone network provider (In 2013 – 2002 Total, 200 3/Three, 400 O2, 400 Orange, 401 T-Mobile, 201 Virgin Mobile, 400 Vodafone)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013.

↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level.

Figure 54 shows overall satisfaction with customer service among those customers who contacted their mobile phone network provider with a complaint. Satisfaction is significantly lower (57%) among those who contacted their mobile phone network provider with a complaint compared to the average across all contacts (75%). In 2013, this average for the sector does not vary by provider.

Since 2012, customers who contacted their mobile phone network provider about a complaint are more likely to say they are satisfied (57% vs. 47% in 2012). This increase in satisfaction is attributable to an increase among Vodafone customers (66% vs. 39%). Given that the level of complaints between 2012 and 2013 is unchanged for Vodafone customers, this suggests that the overall improvement in satisfaction with customer services (as shown in Figure 53) is due to an improvement in their complaints handling specifically.

Figure 54: Satisfaction with customer service from provider – mobile phone complaints: 2009, 2011, 2012 and 2013



	3/Three	O2	Orange	T-Mobile	Virgin Mobile	Vodafone
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE	=	=	=	=	=	=

Q3. Overall how satisfied are you with the service you received from [PROVIDER] customer services on this occasion? (prompted responses, single coded)
Base: All UK households contacting mobile phone network provider with a complaint (In 2013 – 567 Total, 57 3/Three, 110 O2, 113 Orange, 110 T-Mobile, 62 Virgin Mobile, 115 Vodafone) *Caution: Base below 100
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013.

↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level.

Satisfaction with contacting customer service

Mobile phone customers who have contacted their network provider are more likely than in 2012 to be satisfied with their provider calling them back when promised

Customers who had contacted their mobile phone network provider (either by phone or email) were asked to rate their satisfaction with various aspects of their provider's customer services on a 10 point scale; where 10 is extremely satisfied and 1 is extremely dissatisfied.

Figure 55 below shows the percentage of customers stating that they were satisfied (giving a rating of 7-10) for three measures relating to contacting customer services.[40]

In 2013, among all those who contacted their mobile phone network provider, satisfaction is highest for ease of finding provider contact details (72%) and lowest for calling back when they said they would (47%). Close to two in three (65%) who contacted their mobile phone network provider by phone were satisfied with the ease of getting through to the right person. In 2013, compared to the sector as a whole, Orange customers are less likely to be satisfied with the ease of finding provider contact details (65% vs. 72% for the sector as a whole) and are also less satisfied with the ease of getting through to the right person (56% vs. 65% for the sector as a whole).

[40] 'Measure 3: Ease of getting through to the right person' was asked of those who contacted customer services by phone.

Since 2012, there has been an increase in the proportion of customers who are satisfied with their mobile phone network provider calling them back when they said they would (47% vs. 36%). This increase in the sector average is attributable to an increase among customers of O2 (53% vs. 40% in 2012) Orange (41% vs. 32% in 2012), T-Mobile (47% vs. 37%) and Vodafone (51% vs. 35%). While there has been no change since 2012 in the sector average for satisfaction with ease of finding provider contact details, Orange customers are less likely to say they are satisfied for this measure (65% vs. 74% in 2012).

Figure 55: Satisfaction with contacting customer service

% satisfied (giving a rating of 7-10)	Sector average		3/Three		O2		Orange		T-Mobile		Virgin Mobile		Vodafone	
Measure 1	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Ease of finding provider contact details	74	72	76	73	78	77	74	65↓	71	72	71	75	69	75
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		*L*		=		=		=
Measure 2	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Calling you back when they said they would	36	47↑	37	45	40	53↑	32	41↑	37	47↑	31	39	35	51↑
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		=		=		=		=
Measure 3	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Ease of getting through to the right person (phone only)	66	65	72	67	70	71	63	56	62	65	59	68	67	66
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		*L*		=		=		=

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 (prompted responses, single coded)
Base: All UK households contacting mobile phone network provider / contacting by phone (In 2013 – 2002/1883 Total, 200/188 3/Three, 400/ 364 O2, 400/ 387 Orange, 401/ 384 T-Mobile, 201/ 191 Virgin Mobile, 400/ 369 Vodafone)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013
↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level
=/ H/ L indicates that the provider's measure does not differ/ is higher/ is lower compared to the sector average in 2013

Satisfaction with speed of customer service

Around two-thirds of customers continue to be satisfied with the speed of customer services - although satisfaction is lower among Orange customers

Figure 56 below shows the percentage of customers stating that they were satisfied (giving a rating of 7-10) with two specific measures relating to the speed of customer service[41].

[41] 'Measure 1: Speed of answering the phone' was asked of those who contacted customer services by phone.

Around two-thirds of customers who contacted their mobile phone network provider were satisfied with both the speed of answering the phone (64%) and the time taken to handle the issue (67%). In 2013, results vary by mobile phone network provider against the sector average for both these measures. Orange customers are less likely to say they are satisfied with the speed of answering the phone (53% vs. 64%) and are also less satisfied with the time taken to handle the issue compared to the sector overall (60% vs. 67%).

There have been no changes in the sector average since 2012 for either measure. Orange customers are, however now less likely to say they are satisfied with the speed of answering the phone (53% vs. 66% in 2012).

Figure 56: Satisfaction with the speed of customer service

% satisfied (giving a rating of 7-10)	Sector average		3/Three		O2		Orange		T-Mobile		Virgin Mobile		Vodafone	
Measure 1	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Speed of answering phones (phone only)	67	64	71	71	73	68	66	53↓	61	64	57	64	67	68
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		*L*		=		=		=
Measure 2	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
The time taken to handle issue	67	67	66	70	73	71	67	60	63	69	67	69	61	69
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		*L*		=		=		=

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 (prompted responses, single coded)
Base: All UK households contacting mobile phone network provider / contacting by phone (In 2013 – 2002/1883 Total, 200/188 3/Three, 400/ 364 O2, 400/ 387 Orange, 401/ 384 T-Mobile, 201/ 191 Virgin Mobile, 400/ 369 Vodafone)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013
↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level
=/ H/ L indicates that the provider's measure does not differ/ is higher/ is lower compared to the sector average in 2013

Satisfaction with advice from customer service

Since 2012, mobile customers are more likely to say they are satisfied that the advice/ information was useful and in getting the issue resolved to their satisfaction

Customers contacting their mobile phone network provider in the three months prior to the interview were asked to rate their satisfaction with three aspects relating to the standard of advice from their mobile phone network provider (Figure 57).

Satisfaction with the standard of advice from the mobile phone network provider's customer service is consistent across each of its three constituent elements. Around seven in ten customers were satisfied that the advice/ information was easy to understand (70%), useful (70%), and with getting the issue resolved to their satisfaction (69%). In 2013, Orange customers are less likely to say they are satisfied that the advice/ information was useful compared to the sector overall (63% vs. 70%). Orange customers are also less likely to say they are satisfied with getting the issue resolved to their satisfaction (61% vs. 69%)

Since 2012, mobile phone customers are more likely to be satisfied that the advice or information was useful (70% vs. 66%) which is attributable to an increase among Vodafone customers (71% vs. 62%). Mobile phone customers overall are also more likely to be satisfied with getting the issue resolved to their satisfaction (69% vs. 65% in 2012), although this increase is not attributable to any individual mobile phone network provider.

Figure 57: Satisfaction with the standard of advice from customer service

% satisfied (giving a rating of 7-10)	Sector average		3/Three		O2		Orange		T-Mobile		Virgin Mobile		Vodafone	
Measure 1	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Advice/ information was easy to understand	69	70	66	70	75	74	71	65	62	68	66	69	65	71
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		=		=		=		=
Measure 2	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Advice/ information was useful	66	70↑	62	74	71	76	67	63	61	65	65	66	62	71↑
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		*L*		=		=		=
Measure 3	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Getting the issue resolved to your satisfaction	65	69↑	64	75	72	75	66	61	60	66	64	65	62	69
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		*L*		=		=		=

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 (prompted responses, single coded)
Base: All UK households contacting mobile phone network provider (In 2013 – 2002 Total, 200 3/Three, 400 O2, 400 Orange, 401 T-Mobile, 201 Virgin Mobile, 400 Vodafone)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013
↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level
=/ H/ L indicates that the provider's measure does not differ/ is higher/ is lower compared to the sector average in 2013

Satisfaction with customer service advisor

Since 2012, mobile phone network providers are more satisfied across four of the six measures relating to satisfaction with the customer service advisor

Customers contacting their mobile phone network provider in the three months prior to the interview were asked to rate their satisfaction with the customer service advisor for six individual measures. These measures are shown across Figure 58 and Figure 59.

In 2013 for the mobile phone sector overall, satisfaction is highest for courtesy and politeness of advisors (80%) and lowest for the advisor logging query details to avoid having to repeat yourself (62%). In 2013 compared to the sector average overall, O2 customers are more satisfied with the advisor doing what they said they would do (79% vs. 72% for the sector overall) while Orange customers are less likely to be satisfied with being kept informed throughout the process (63% vs. 70%) and with the advisor doing what they said they would do (65% vs. 72%).

Since 2012, however, satisfaction across the sector as a whole has increased for the advisor taking my questions/ issue seriously (76% vs. 72% in 2012), keeping them informed throughout the process (70% vs. 65%), the advisor doing what they said they would do (72% vs. 68%) and for logging query details to avoid the customer having to repeat themselves (62% vs. 56%). For these last three measures these increases in satisfaction are all attributable to Vodafone customers. For the other mobile phone network providers, satisfaction with the customer service advisor across each of the six measures is unchanged compared to 2012.

Figure 58: Satisfaction with the customer service advisor

% satisfied (giving a rating of 7-10)	Sector average		3/Three		O2		Orange		T-Mobile		Virgin Mobile		Vodafone	
Measure 1	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Courtesy and politeness of advisers	77	80	75	82	80	83	77	78	74	80	79	75	74	81
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		=		=		=		=
Measure 2	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Adviser ability to understand the issue and identify the problem	68	71	63	71	74	75	69	68	67	69	67	67	64	71
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		=		=		=		=
Measure 3	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Adviser took my questions/ issue seriously	72	76↑	70	76	78	80	72	73	70	73	72	71	69	76
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		=		=		=		=

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 (prompted responses, single coded)
Base: All UK households contacting mobile phone network provider (In 2013 – 2002 Total, 200 3/Three, 400 O2, 400 Orange, 401 T-Mobile, 201 Virgin Mobile, 400 Vodafone)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013

↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level

=/ H/ L indicates that the provider's measure does not differ/ is higher/ is lower compared to the sector average in 2013

Saville Rossiter-Base

Figure 59: Satisfaction with the customer service advisor/ 2

% satisfied (giving a rating of 7-10)	Sector average		3/Three		O2		Orange		T-Mobile		Virgin Mobile		Vodafone	
Measure 4	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Keeping you informed throughout the process	65	70↑	65	72	73	75	64	63	64	70	61	69	60	70↑
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		*L*		=		=		=
Measure 5	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Adviser doing what they said they would do	68	72↑	66	72	73	79	67	65	68	69	67	67	63	72↑
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		*H*		*L*		=		=		=
Measure 6	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Logging of query details to avoid having to repeat yourself	56	62↑	64	64	62	67	55	56	55	62	48	56	53	64↑
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		=		=		=		=

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 (prompted responses, single coded)
Base: All UK households contacting mobile phone network provider (In 2013 – 2002 Total, 200 3/Three, 400 O2, 400 Orange, 401 T-Mobile, 201 Virgin Mobile, 400 Vodafone)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013

↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level

=/ H/ L indicates that the provider's measure does not differ/ is higher/ is lower compared to the sector average in 2013

Satisfaction with other aspects of customer service

There has been an increase in satisfaction for offering compensation or a goodwill payment and in willingness to help resolve the issue

Figure 60 shows the percentage of satisfied customers for more general customer service attributes. While most customers who contacted their mobile phone network provider were satisfied with the willingness to help resolve the issue (72%), considerably fewer were satisfied with the provider offering compensation or a goodwill payment (37%). Compared to the sector overall Virgin mobile customers are less likely to be satisfied with the provider offering compensation or a goodwill payment (27% vs. 37% overall).

Compared to 2012, there has been an increase in satisfaction for offering compensation or a goodwill payment (37% vs. 29%); with this due to an increase in satisfaction among Orange customers (34% vs. 25%), T-Mobile customers (37% vs. 27%) and Vodafone customers (40% vs. 29%). There has also been an increase in the willingness to help resolve the issue for the sector as a whole (72% vs. 67%), although this increase is not attributable to any of the individual mobile phone network providers.

Figure 60: Satisfaction with other aspects of customer service

% satisfied (giving a rating of 7-10)	Sector average		3/Three		O2		Orange		T-Mobile		Virgin Mobile		Vodafone	
Measure 1	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Offering compensation or a goodwill payment	29	37↑	41	40	39	40	25	34↑	27	37↑	22	27	29	40↑
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		=		=		*L*		=
Measure 2	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Willingness to help resolve your issue	67	72↑	64	74	72	77	67	68	65	68	67	65	66	72
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		=		=		=		=

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 (prompted responses, single coded)
Base: All UK households contacting mobile phone network provider (In 2013 – 2002 Total, 200 3/Three, 400 O2, 400 Orange, 401 T-Mobile, 201Virgin Mobile, 400 Vodafone)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013

↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level

=/ H/ L indicates that the provider's measure does not differ/ is higher/ is lower compared to the sector average in 2013

Future use of provider based on experience

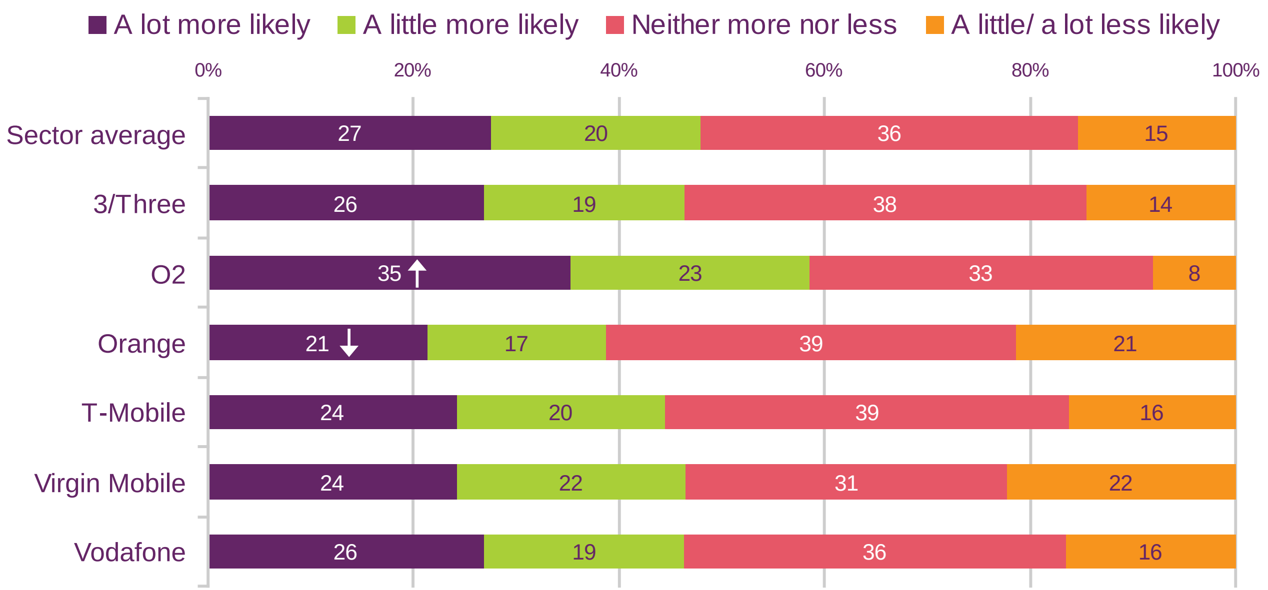
Likelihood of using a mobile phone network provider as a result of their recent customer service experience has increased for O2 customers only

Customers contacting their mobile phone network provider were asked whether their most recent customer service experience has made them more or less likely to use their mobile phone network provider in the future. Results are shown at an overall level and by provider for 2012 and 2013 in Figure 61.

Compared to 2012, there has been no change in the likelihood of future use for the sector as a whole and O2 customers say they are now a lot more likely to use their provider again (35% vs. 26% in 2012).

Among all customers contacting their mobile phone network provider, one in four said they were now a lot more likely to use their mobile phone network provider again (27%) with fewer saying they were now a little or a lot less likely (15%). In 2013, O2 customers said they are now more likely to use their provider again compared to the sector overall (35% vs. 27% for the sector overall) while fewer Orange customers said they would be a lot more likely (21% vs. 27%).

Figure 61: Future use of provider given customer service experience - mobile phone: 2012 and 2013



Q7. Has your experience of [PROVIDER]'s customer service for this issue made you more or less likely to use [PROVIDER] in the future? (prompted responses, single coded)
Base: All UK households contacting mobile phone network provider (In 2013 – 2002 Total, 200 3/Three, 400 O2, 400 Orange, 401 T-Mobile, 201 Virgin Mobile, 400 Vodafone)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013.

↑↓ indicates significantly higher/ lower for 'A lot more likely' or 'less likely' than sector average at the 99% confidence level.

Section 7

Pay TV sector

This section looks in detail at the pay TV sector. It shows, where possible, how each provider included (BT TV, Sky and Virgin Media) performs against key measures such as:

- incidence of contact about pay TV
- incidence of complaints
- issue type
- whether the issue was completely resolved
- satisfaction with customer service
- future use based on customer service experience

For each measure this section shows how the provider performs in 2013 against the overall pay TV sector average. This section also shows, where possible, how the sector average and the provider-specific measures in 2013 compare to those in 2012. The longer term trend is also reported

In 2013, customers who had made contact with one of three pay TV providers were included in the study: BT TV, Sky and Virgin Media. BT TV was included as a provider in 2013 due to meeting the measure of having a market share of 4% or more within the sector. As BT TV's market share meets this criteria, , sufficient interviews were conducted at the Stage 1 telephone omnibus fieldwork with BT TV customers who had made contact with the provider. This information was used to weight the Stage 2 online interviewing data.

Analysis of BT TV's customer service is limited to some extent by their relatively low market share, and subsequently lower sample size. We will continue to monitor providers' market share across all sectors and adjust quotas accordingly in subsequent waves of this research.

From 2009 to 2012, the pay TV sector average included only Sky and Virgin Media. We are confident that the 2013 sector average is comparable with the average from previous years because the inclusion of BT TV prior to 2013 would have had a negligible impact on the data due to the lower market share for this provider in previous years.

Recent contact with provider

Compared to 2012, there has been an increase in customers contacting their pay TV provider in the three months prior to the interview – attributable to an increase among Sky customers

These incidences in 2013 are therefore more comparable to the incidences in Q3 2011.

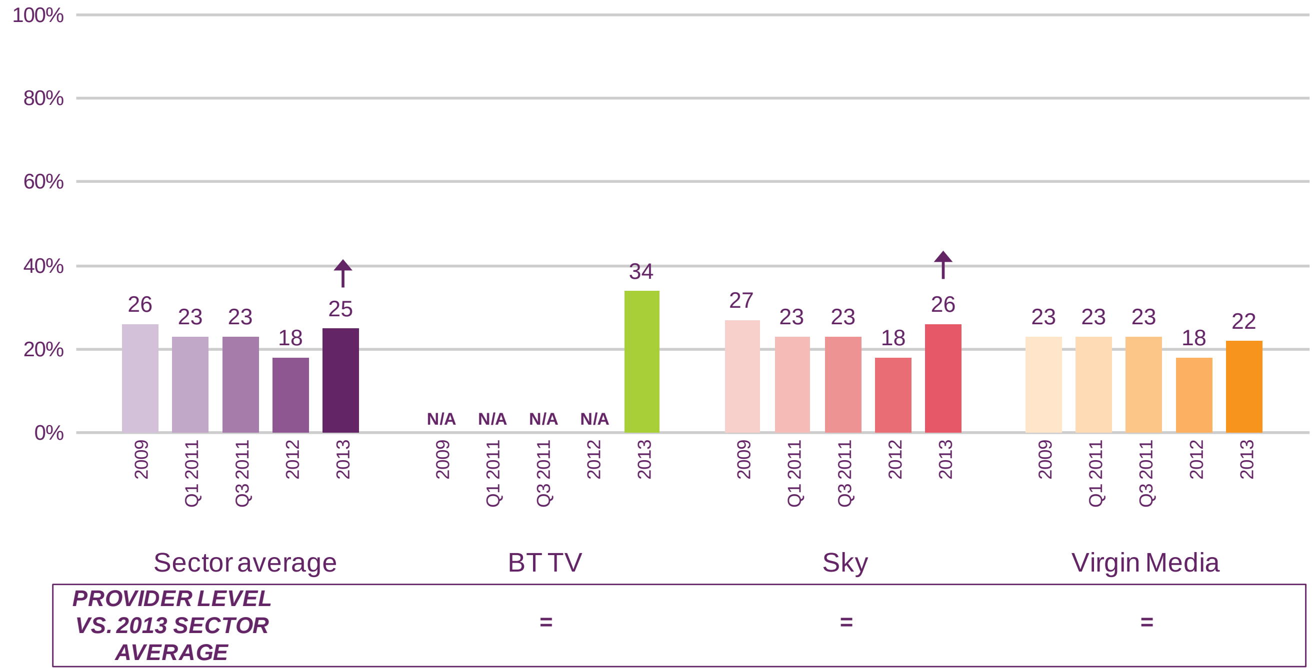
Figure 62 below shows the proportion of customers that have made contact (by telephone or email), in the three months prior to the interview[42], with any of the three pay TV providers. This contact was either regarding a specific issue relating to their pay TV or a more general issue that applies to all the services they may take with that provider.[43]

In 2013, one in four (25%) of all UK households using one of the three pay TV providers had contacted their provider in the three months prior to the interview. This measure does not differ by provider compared to the sector average[44].

Since 2012, there has been an increase in overall contact to any pay TV provider (18% vs. 25% in 2012), with this increase attributable to Sky customers being more likely to make contact (26% vs. 18% in 2012). There has been no change since 2012 for Virgin Media customers[45]. It is worth noting however, that the increase in contacts in 2013 at an overall level for the sector and for Sky customers follows a decrease in contacts in 2012. These incidences in 2013 are therefore more comparable to the incidences in Q3 2011.

[42] With the data for this measure coming from the omnibus study this means that the contact was between May and July 2013
[43] So for example, if a customer has their pay TV and broadband service provided by Virgin Media and they did not say their most recent contact was regarding the pay TV service specifically, then they were asked whether it was a general issue that applies to both their pay TV and broadband service
[44] This is indicated by the '=' symbols appearing for each provider in the box below the chart within Figure 14. This convention is included across several of the Figures in this and subsequent sections. If in 2013, for a given measure a provider performs better than the sector average the box below the chart will show *'HIGHER'* for that particular provider and if a provider performs worse then it will show *'LOWER'*
[45] It is not possible to undertake any time series analysis for BT TV customers as an insufficient number of interviews were achieved in the omnibus study in 2012

Figure 62: Proportion of customers that had contacted their pay TV provider in the three months prior to the interview: 2009, 2011, 2012 and 2013



Q6. Thinking of [PROVIDER] and the services you buy from them, have you contacted them in the last 3 months by telephone or email? (spontaneous responses, single coded)
Base: All UK households using Pay TV providers (In 2013 – 1612 Total, 141 BT TV, 1005 Sky, 466 Virgin Media)
Source: Ofcom research, omnibus survey, fieldwork carried out by Saville Rossiter-Base in August and September 2013.

↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level.

Proportion of complaints

The proportion of contacts considered to be complaints has increased since 2012 for Sky customers but BT TV is the only provider with higher than average levels of complaints

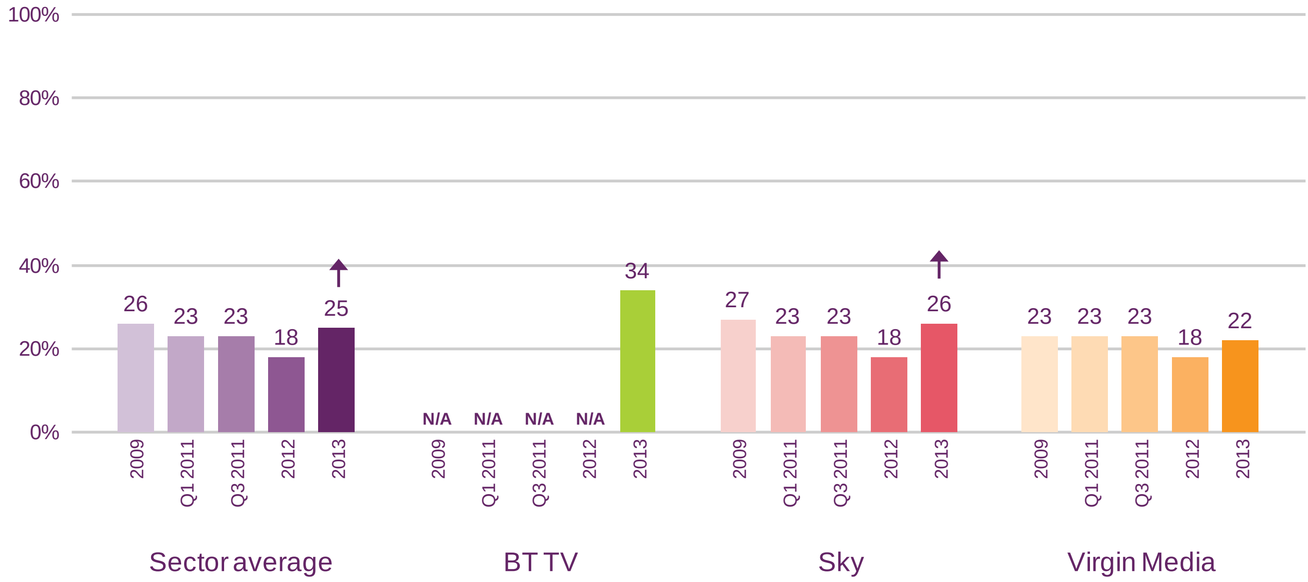
Since the 2011 surveys, those customers that have contacted their pay TV provider (in the previous three months)[46] are asked whether they considered the reason for this contact to be a complaint[47]. Figure 63 shows that overall one in four contacts (26%) are considered to be complaints. In 2013, this incidence does vary by provider as four in ten BT TV customer contacts are considered to be complaints (40% vs. 26% for the sector overall).

Since 2012 the proportion of contacts considered to be complaints has increased for the pay TV sector overall (26% vs. 21% in 2012) with this being attributable to an increase for Sky customers (26% vs. 17% in 2012).

[46] With the data for this measure coming from the online study this means that the contact was between July and September 2013

[47] Respondents were not prompted with a definition of a complaint, this was therefore self- defined by the respondent

Figure 63: Proportion of customers who contacted their provider in the three months prior to the interview with a complaint - pay TV provider: 2009, 2011, 2012 and 2013



PROVIDER LEVEL VS. 2013 SECTOR AVERAGE	=	=	=

Q6. Thinking of [PROVIDER] and the services you buy from them, have you contacted them in the last 3 months by telephone or email? (spontaneous responses, single coded)
Base: All UK households using Pay TV providers (In 2013 – 1612 Total, 141 BT TV, 1005 Sky, 466 Virgin Media)
Source: Ofcom research, omnibus survey, fieldwork carried out by Saville Rossiter-Base in August and September 2013.

↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level.

Most recent contact by issue type

There has been no change since 2012 in the type of issue that customers are contacting their pay TV provider about

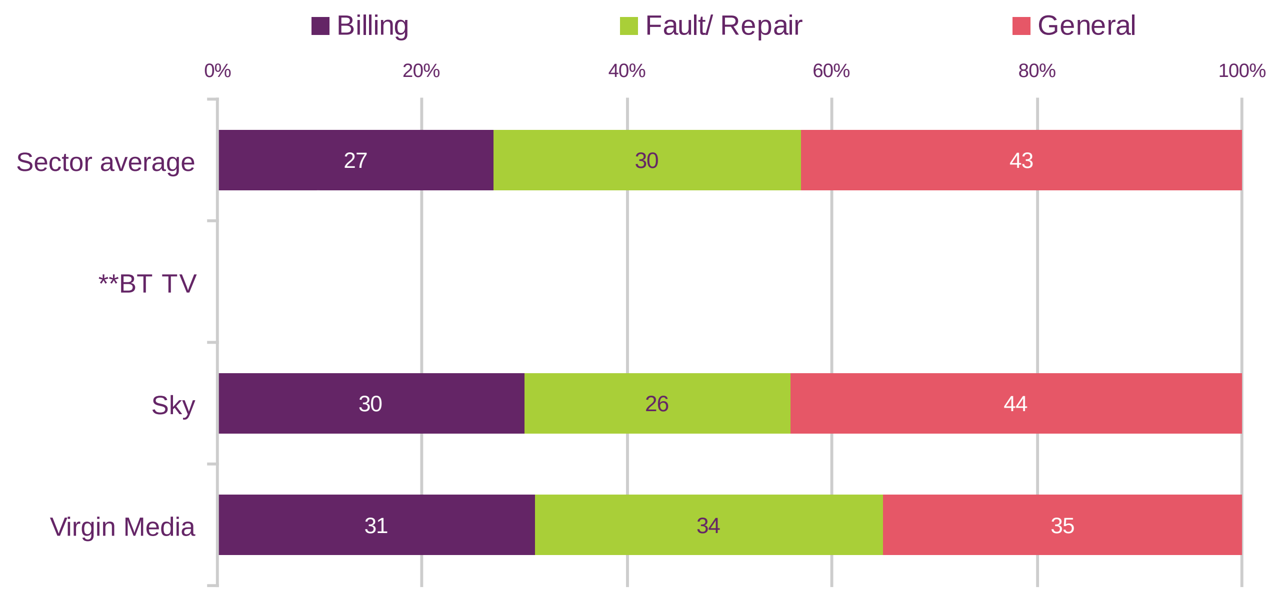
Customers were prompted with a list of seven possible reasons for contacting their pay TV provider and asked to say which one reason applied for their most recent contact. These seven possible responses were then grouped into three distinct categories: a billing issue, a fault or repair issue or a general enquiry issue.

Figure 64 below shows the incidence of the three types of issue in 2013. Across all pay TV providers, more than four in ten contacts (43%) relate to a general enquiry, with more than one in four (27%) contacts about a billing issue, and three in ten (30%) contacts about a fault or repair. Within the pay TV sector overall it is therefore more common for recent contact to be about a general enquiry issue than about either a fault/ repair or a billing issue.

There are no differences among Sky or Virgin Media customers compared to the overall sector average.[48]

Since 2012, where base sizes allow the comparison, there has been no change in the type of issue that pay TV providers are contacted about.

Figure 64: Type of issue for most recent contact with pay TV provider: 2013



Q8. Thinking of the most recent issue you had to contact [PROVIDER] about, which one of the following categories did the issue fall into? Was it to do with..... ? (prompted responses, single coded)
Base: All UK households contacting Pay TV provider (In 2013 – 413 Total, 46 BT TV, 261 Sky, 106 Virgin Media) **Base below 50, not reported
Source: Ofcom research, omnibus survey, fieldwork carried out by Saville Rossiter-Base in August and September 2013.

↑↓ indicates significantly higher/ lower than sector average at the 99% confidence level.

Key issues by contact type

The most common reason for contacting the pay TV provider is to make a change to the package or service

Figure 65 shows the top four reasons for recent contact with service providers, by each issue type[49]. No single reason accounts for a majority of contacts from pay TV customers to their provider in 2013, as in 2012.

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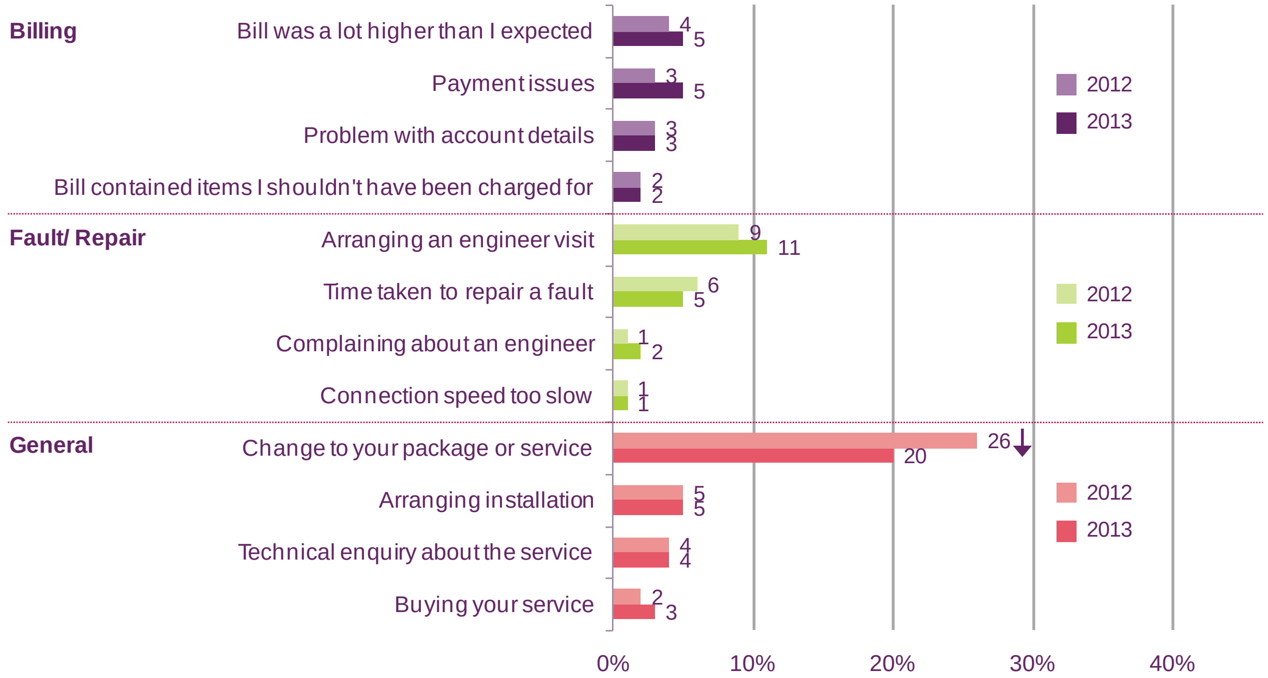
[48] Please note that the number of interviews conducted on the omnibus study among BT TV pay TV customers are not shown as they total under 50 interviews. From the online interviewing, the type of issue for the most recent contact with BT TV is 7% Billing, 42% Fault/ Repair and 51% General enquiries

[49] Respondents were shown a different list of reasons to choose from dependent on whether they said their most recent contact was regarding a billing, fault and repair or general issue. To enable a comparison the data in Figure 65 is expressed as a proportion of all those that have contacted their pay TV provider in the last 3 months.

The most commonly mentioned reason for contacting their provider was to change their package or service (20%), in terms of upgrading or downgrading it. Around one in ten made contact to arrange an engineer visit (11%). Around one in twenty (5%) or fewer customers contacted their provider for any other reason.

Since 2012, contact to make a change to the package or service is now less likely (20% vs. 26% in 2012).

Figure 65: Pay TV – Top 4 issues per contact type: 2012 and 2013



S7a-c. And more specifically, which of the following best describes what the issue with [PROVIDER] was concerning? (prompted responses, single coded)
Base: All UK households contacting Pay TV provider (In 2013 – 1103 Total, In 2012 – 1152 Total)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013.

↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level.

Issue resolution

Pay TV providers are more likely to resolve general enquiries compared to either billing or fault/ repair issues

Those that had contacted their pay TV provider in the three months prior to interview were asked the extent to which they felt the issue they had contacted their provider about had been resolved. Respondents were given the choice of whether the issue had been fully resolved, partially resolved or if it was still unresolved (as defined by the respondent). Figure 66 below shows the proportions in 2013 who considered their issue completely resolved[50] by issue type for each provider. Figure 67 then shows any differences in these measures compared to 2012.

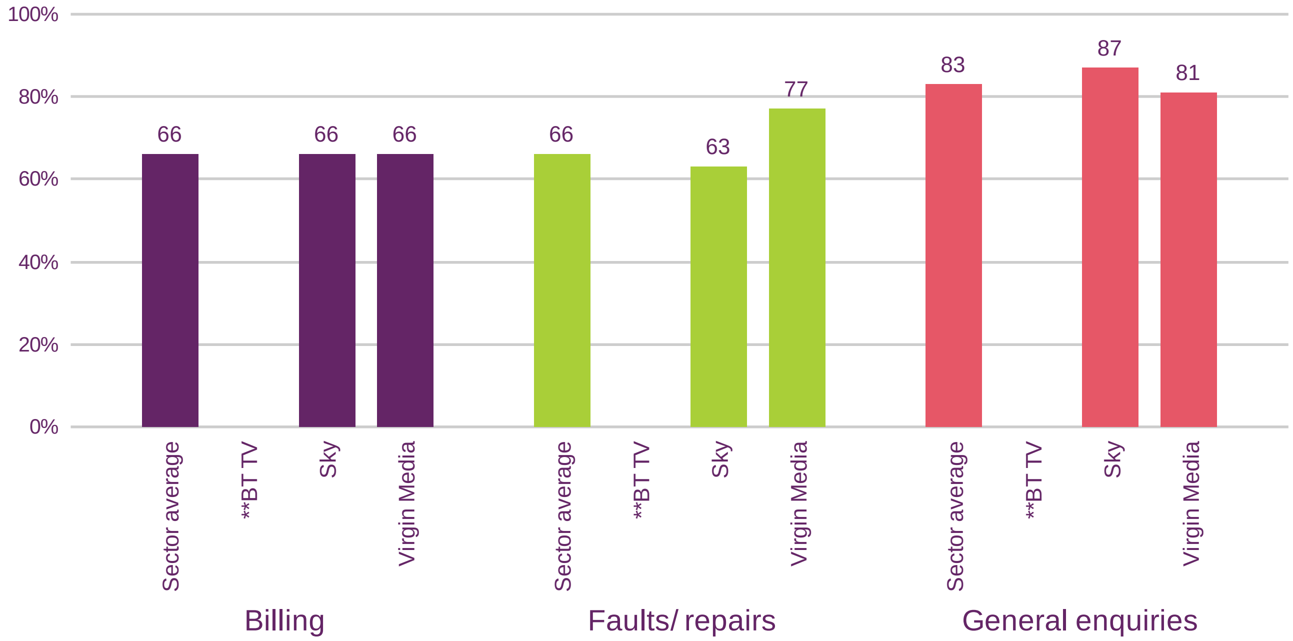
[50] It was decided in 2013 to report on complete resolution as issues that are 'partly' resolved may go on to be completely resolved or may remain only partly resolved

As shown in Figure 66, a majority of customers contacting any pay TV provider about each type of issue (billing/ fault or repair/ general enquiries) felt that this issue had been completely resolved. This is also the case for each issue type for both Sky and Virgin Media.

At an overall sector level, resolution does vary by the type of issue as pay TV providers are more likely to resolve general enquiries (83%) than they are to resolve either billing (66%) or fault or repair issues (66%). This is also true for Sky customers. Virgin Media customers are only more likely to resolve general enquiries (81%) compared to billing issues (66%).

In 2013, neither Sky nor Virgin perform better or worse than the sector average for any of these type of issues.

Figure 66: Pay TV - Whether the issue that the customer contacted their provider about was considered to be completely resolved, by provider: 2013



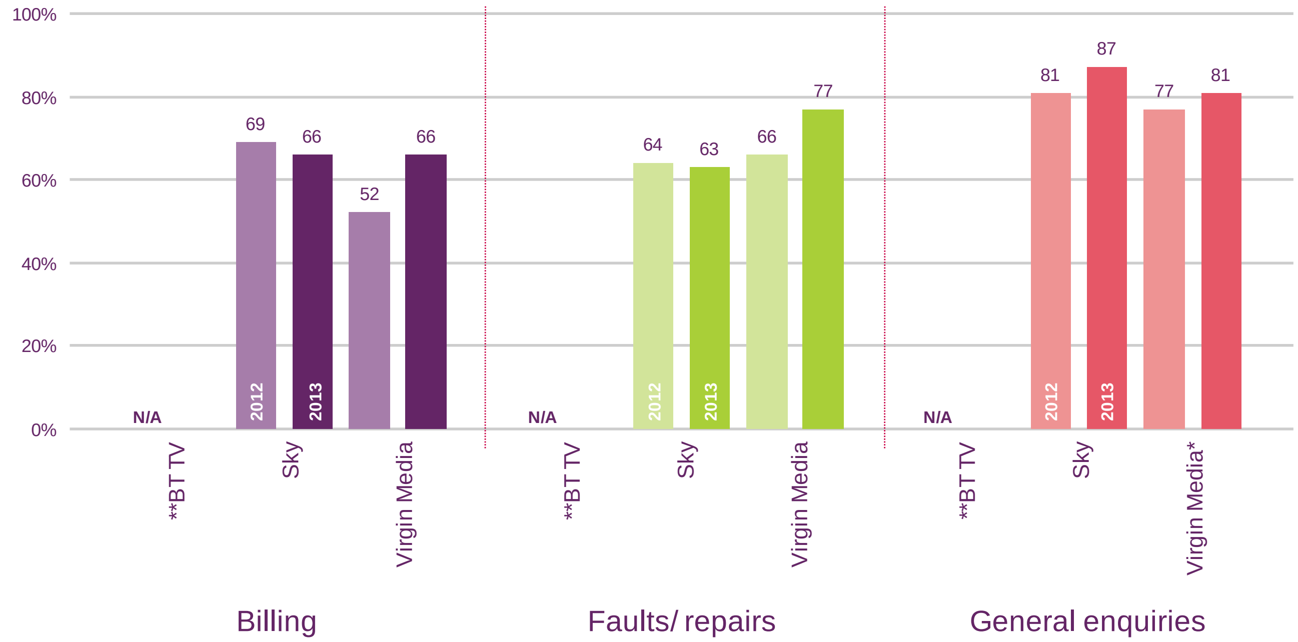
Q5. In your opinion, was [PROVIDER] able to successfully resolve your issue [BILLING/ FAULT/ GENERAL ENQUIRY]? (spontaneous responses, single coded)
Base: All UK households contacting Pay TV provider about each type of issue (In 2013 – For billing 316 Total, 19 BT TV, 178 Sky, 119 Virgin Media, for faults/ repairs 394 Total, 42 BT TV, 131 Sky, 221 Virgin Media, for general enquiries 393 Total, 39 BT TV, 194 Sky, 160 Virgin media)
**Base below 50, not reported
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013.

↑↓ indicates significantly higher/ lower than sector average at the 99% confidence level.

Figure 67 shows that, where it is possible to draw comparisons between 2012 and 2013, there has been no change in issue resolution by provider type.

While not shown in Figure 66 or Figure 67, those that contacted their pay TV provider with a complaint are less likely to feel that their issue was resolved (62%) compared to those whose issue was not considered a complaint (77%).

Figure 67: Pay TV - Whether the issue that the customer contacted their provider about was considered to be completely resolved, by provider: 2012 and 2013



Q5. In your opinion, was [PROVIDER] able to successfully resolve your issue [BILLING/ FAULT/ GENERAL ENQUIRY]? (spontaneous responses, single coded)
Base: All UK households contacting Pay TV provider about each type of issue (In 2013 – For billing 316 Total, 19 BT TV, 178 Sky, 119 Virgin Media, for faults/ repairs 394 Total, 42 BT TV, 131 Sky, 221 Virgin Media, for general enquiries 393 Total, 39 BT TV, 194 Sky, 160 Virgin media)
*Caution: Base below 100 for Virgin Media General enquiries in 2012, **Base below 50, not reported
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013.

↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level.

Number of contacts

Nearly six in ten customers contacting their pay TV provider only required one contact rising to seven in ten among customers with resolved contacts

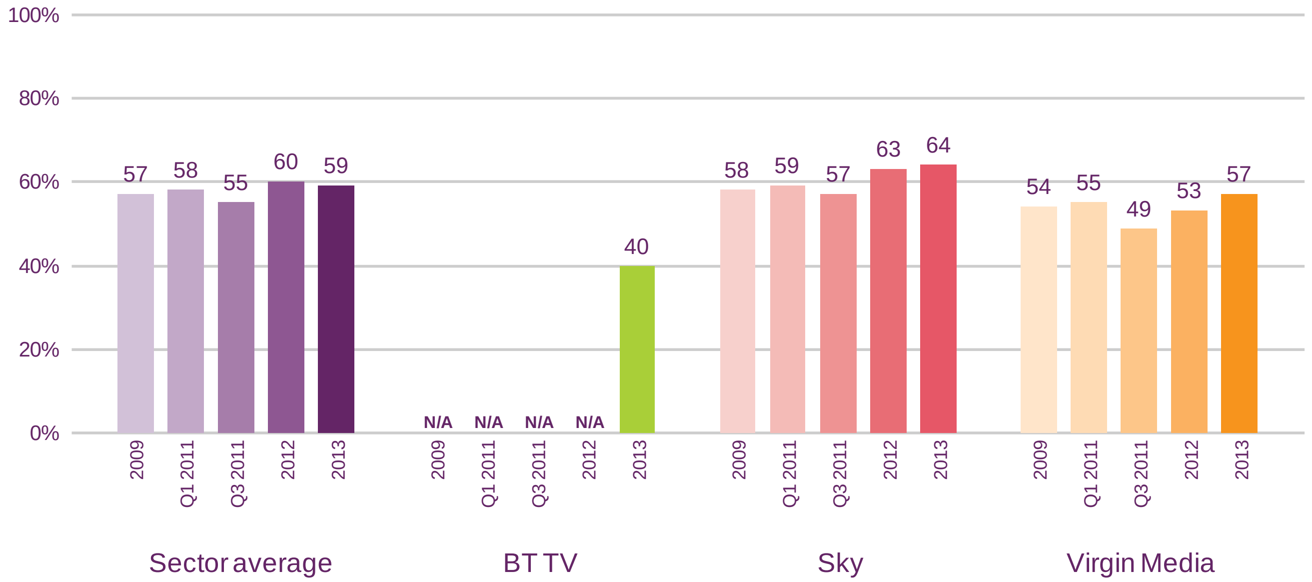
Customers were asked how many times they had been in contact, so far, with their pay TV provider about their most recent issue. Figure 68 shows the proportion that had only been in contact once with their pay TV provider, at an overall sector level and by provider (between 2009 and 2013).

Nearly six in ten (59%) customers contacting any pay TV provider, only made contact on one occasion and this measure is unchanged since 2012. In 2013, BT TV customers are less likely to have made contact only once compared to the sector overall (40% vs. 59%). There has been no change in this incidence of making contact only once since 2012 for any individual pay TV provider.

While not shown in Figure 68, those customers who did not feel their issue was a complaint are more likely to have contacted their pay TV provider only once compared to those making contact with a complaint (66% vs. 40% for those with a complaint).

Although also not shown in Figure 68, the proportion of customers in contact once with their pay TV provider stands at 70% among those who considered that their issue had been completely resolved. This overall measure does not differ across the pay TV providers and there has been no change in this incidence since 2012 for any individual provider or the sector overall.

Figure 68: Proportion in contact one time with the provider – pay TV: 2009, 2011, 2012 and 2013



PROVIDER LEVEL VS. 2013 SECTOR AVERAGE	LOWER	=	=

Q6. How many times have you been in contact with [PROVIDER] in relation to this particular issue so far? (prompted responses, single coded)
Base: All UK households contacting Pay TV provider (In 2013 – 1103 Total, 100 BT TV, 503 Sky, 500 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013.

↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level.

Overall satisfaction with customer service

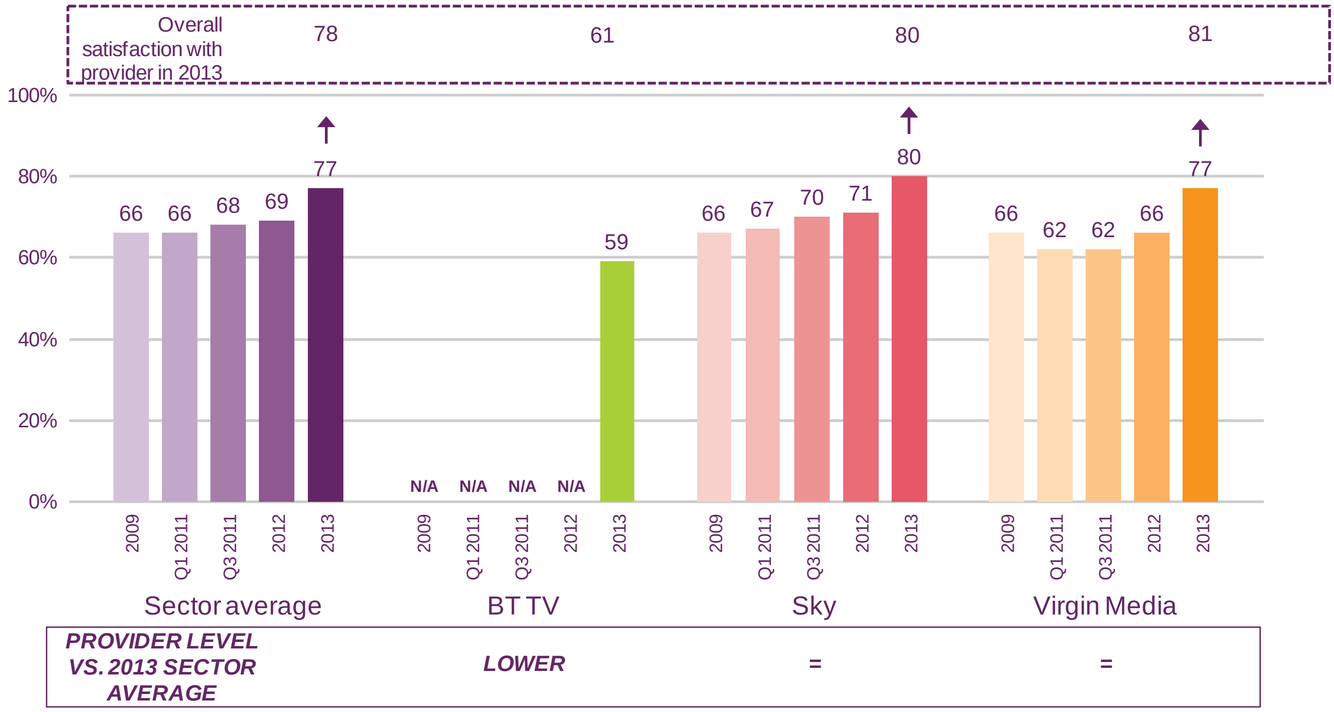
Since 2012, Sky and Virgin Media customers are more likely to be satisfied with the customer service received, and BT TV is the only provider with below average satisfaction

Satisfaction with the customer service provided by the pay TV provider when the customer was recently in contact, as shown in Figure 69, is at a comparable level to overall satisfaction with the provider, for the sector overall and for each provider.

In 2013, more than three in four customers (77%) who contacted their pay TV provider were satisfied with the customer service received. This measure is lower among BT TV customers (59% vs. 77% for the sector as a whole).

Compared to 2012, there has been an increase in satisfaction with customer service at an overall sector level (77% vs. 69%) and this increase is apparent for both Sky (80% vs. 71% in 2012) and Virgin Media customers (77% vs. 66%).

Figure 69: Satisfaction with customer service from provider – pay TV: 2009, 2011, 2012 and 2013

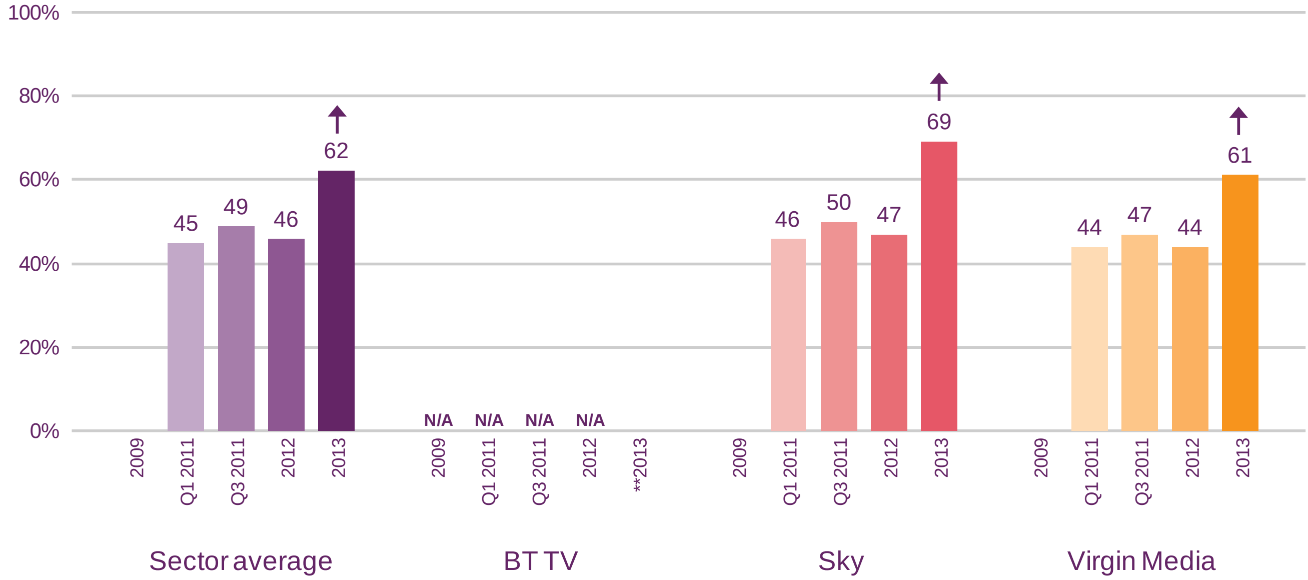


Q3. Overall how satisfied are you with the service you received from [PROVIDER] customer services on this occasion? (prompted responses, single coded)
Base: All UK households contacting Pay TV provider (In 2013 – 1103 Total, 100 BT TV, 503 Sky, 500 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013.
↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level.

Figure 70 shows overall satisfaction with customer service among those customers who contacted their pay TV provider with a complaint. More than six in ten (62%) who contacted their pay TV provider with a complaint were satisfied with the customer service received. In 2013, this average for the sector does not vary by provider.

Since 2012, overall satisfaction with customer service among customers with a complaint has increased among Sky customers (69% vs. 47%) among Virgin Media customers (61% vs. 44%) and for the sector overall. (62% vs. 46%).

Figure 70: Satisfaction with customer service from provider – pay TV complaints: 2009, 2011, 2012 and 2013



PROVIDER LEVEL VS. 2013 SECTOR AVERAGE	BT TV	Sky	Virgin Media
	=	=	=

Q3. Overall how satisfied are you with the service you received from [PROVIDER] customer services on this occasion? (prompted responses, single coded)
Base: All UK households contacting Pay TV provider with a complaint (In 2013 – 301 Total, 42 BT TV, 125 Sky, 134 Virgin Media) **Base below 50, not reported
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013.
↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level.

Satisfaction with contacting customer service

Pay TV customers who have contacted their provider are more likely than in 2012 to be satisfied with their provider calling them back when they said they would

Customers who had contacted their pay TV provider (either by phone or email) were asked to rate their satisfaction with various aspects of their provider's customer services on a 10 point scale; where 10 is extremely satisfied and 1 is extremely dissatisfied.

Figure 71 below shows the percentage of customers stating that they were satisfied (giving a rating of 7-10) for three measures relating to contacting customer services.[51]

In 2013, among all those who contacted their pay TV provider, satisfaction is highest for ease of finding provider contact details (74%) and lowest for calling back when they said they would (46%). Seven in ten of those who contacted their pay TV provider by phone were also satisfied with the ease of getting through to the right person (71%). Results do not vary by individual provider compared to the sector averages for ease of finding provider contact details[52] or for calling back when they said they would. In 2013, satisfaction with ease of getting through to the right person among those who contacted their

[51] 'Measure 3: Ease of getting through to the right person' was asked of those who contacted customer services by phone.
[52] While BT TV customers appear less satisfied for this measure compared to the sector overall (64% vs. 74% for the sector overall) this difference is not statistically significant

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provider by phone in the three months prior to the interview is however lower among BT TV customers compared to the sector overall (56% vs. 71% for the sector overall).

Since 2012, there has been an increase in the proportion of customers who are satisfied with their pay TV provider calling them back when they said they would (46% vs. 33%), with this increase in the sector average attributable to an increase among Sky customers (47% vs. 35%) and Virgin Media customers (43% vs. 30%).

Figure 71: Satisfaction with contacting customer service

% satisfied (giving a rating of 7-10)	Sector average		BT TV		Sky		Virgin Media	
Measure 1	2012	2013	2012	2013	2012	2013	2012	2013
Ease of finding provider contact details	72	74	N/A	64	70	74	76	79
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		=
Measure 2	2012	2013	2012	2013	2012	2013	2012	2013
Calling you back when they said they would	33	46↑	N/A	48	35	47↑	30	43↑
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		=
Measure 3	2012	2013	2012	2013 *	2012	2013	2012	2013
Ease of getting through to the right person (phone only)	67	71	N/A	56	68	74	65	70
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				*L*		=		=

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 (prompted responses, single coded)
Base: All UK households contacting Pay TV provider / contacting by phone (In 2013 – 1103/1046 Total,100/ 92 BT TV, 503/ 467 Sky, 500/ 487 Virgin Media) *Caution: Base below 100 in 2013
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013
↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level
=/ H/ L indicates that the provider's measure does not differ/ is higher/ is lower compared to the sector average in 2013

Satisfaction with speed of customer service

Around two-thirds of customers continue to be satisfied with the speed of customer services, but BT TV customers are less satisfied with the time taken to handle issues.

Figure 72 below shows the percentage of customers stating that they were satisfied (giving a rating of 7-10) with two specific measures relating to the speed of customer service[53].

A majority of customers who contacted their pay TV provider were satisfied with both the speed of answering the phone (66%) and the time taken to handle the issue (72%). In 2013, compared to the sector overall, BT TV customers are less likely to say they are satisfied with the time taken to handle the issue (55% vs. 72% for the sector overall).

There has been no change since 2012 in the sector average for either of these measures. Virgin Media customers are however, more likely to say they are satisfied with the time taken to handle the issue (74% vs. 64%).

Figure 72: Satisfaction with the speed of customer service

% satisfied (giving a rating of 7-10)	Sector average		BT TV		Sky		Virgin Media	
Measure 1	2012	2013	2012	2013 *	2012	2013	2012	2013
Speed of answering phones (phone only)	65	66	N/A	55	67	67	62	69
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		=
Measure 2	2012	2013	2012	2013	2012	2013	2012	2013
The time taken to handle issue	68	72	N/A	55	70	74	64	74↑
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				*L*		=		=

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 (prompted responses, single coded)
Base: All UK households contacting Pay TV provider/ contacting by phone (In 2013 – 1103/1046 Total,100/ 92 BT TV, 503/ 467 Sky, 500/ 487 Virgin Media) *Caution: Base below 100 in 2013
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013
↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level
=/ H/ L indicates that the provider's measure does not differ/ is higher/ is lower compared to the sector average in 2013

Satisfaction with advice from customer service

Since 2012, those who contacted their pay TV provider are more likely to be satisfied with getting the issue resolved to their satisfaction

Customers contacting their pay TV provider in the three months prior to the interview were asked to rate their satisfaction with three aspects relating to the standard of advice from their pay TV provider (Figure 73).

[53] 'Measure 1: Speed of answering the phone' was asked of those who contacted customer services by phone.

Satisfaction with the standard of advice from the pay TV provider's customer service is consistent across each of its three constituent elements. At least seven in ten customers were satisfied that the advice/ information was easy to understand (75%), useful (72%), and with getting the issue resolved to their satisfaction (74%). There is one difference when comparing each provider to these sector averages, BT TV customers are less likely to be satisfied that the advice/ information was easy to understand (61% vs. 75% for the sector overall).

Since 2012, there has been an increase in satisfaction for the sector overall regarding the issue being resolved to the customer's satisfaction (74% vs. 68% in 2012), with this increase apparent among both Sky customers (76% vs. 69%) and Virgin Media customers (75% vs. 66%).

Figure 73: Satisfaction with the standard of advice from customer service

% satisfied (giving a rating of 7-10)	Sector average		BT TV		Sky		Virgin Media	
Measure 1	2012	2013	2012	2013	2012	2013	2012	2013
Advice/ information was easy to understand	72	75	N/A	61	74	77	67	75
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				*L*		=		=
Measure 2	2012	2013	2012	2013	2012	2013	2012	2013
Advice/ information was useful	68	72	N/A	60	70	75	63	71
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		=
Measure 3	2012	2013	2012	2013	2012	2013	2012	2013
Getting the issue resolved to your satisfaction	68	74↑	N/A	62	69	76↑	66	75↑
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		=

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 (prompted responses, single coded)
Base: All UK households contacting Pay TV provider (In 2013 – 1103 Total, 100 BT TV, 503 Sky, 500 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013
↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level
=/ *H*/ *L* indicates that the provider's measure does not differ/ is higher/ is lower compared to the sector average in 2013

Satisfaction with customer service advisor

Satisfaction with the customer service advisor is lower than average for BT TV customers but some improvement noted for Virgin Media and Sky

Customers contacting their pay TV provider in the three months prior to the interview were asked to rate their satisfaction with the customer service advisor for six individual measures. These measures are shown across Figure 74 and Figure 75.

In 2013 for the pay TV sector overall, satisfaction is highest for courtesy and politeness of advisors (82%) and lowest for the advisor logging query details to avoid having to repeat yourself (69%). In 2013, BT TV customers are less satisfied compared to the sector as whole for four of the six measures: advisor ability to understand the issue and identify the problem (61% vs. 76% for the sector as a whole), advisor took my questions/ issue seriously (65% vs. 80%), keeping you informed throughout the process (61% vs. 75%) and the advisor doing what they said they would do (59% vs. 77%).

Since 2012, satisfaction has increased for the sector overall for the measure relating to the advisor taking questions/ issue seriously (80% vs. 72%), keeping you informed throughout the process (75% vs. 67%), the advisor doing what they said they would do (77% vs. 69%) and for logging query details to avoid the customer having to repeat themselves (69% vs. 59%). For each of these measures these increases are attributable to higher satisfaction among both Sky and Virgin Media customers.

Since 2012, satisfaction has also increased for the measure relating to the advisor's ability to understand the issue and identify the problem (76% vs. 70%); but this increase is only attributable to an increase among Virgin Media customers.

While the overall pay TV sector score has not increased since 2012 for the courtesy and politeness of advisors, satisfaction has increased among Virgin Media customers (82% vs. 72% in 2012).

Figure 74: Satisfaction with the customer service advisor

% satisfied (giving a rating of 7-10)	Sector average		BT TV		Sky		Virgin Media	
Measure 1	2012	2013	2012	2013	2012	2013	2012	2013
Courtesy and politeness of advisers	78	82	N/A	71	81	84	72	82↑
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		=
Measure 2	2012	2013	2012	2013	2012	2013	2012	2013
Adviser ability to understand the issue and identify the problem	70	76↑	N/A	61	73	79	63	74↑
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				*L*		=		=
Measure 3	2012	2013	2012	2013	2012	2013	2012	2013
Adviser took my questions/ issue seriously	72	80↑	N/A	65	74	82↑	67	79↑
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				*L*		=		=

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
Base: All UK households contacting Pay TV provider (In 2013 – 1103 Total, 100 BT TV, 503 Sky, 500 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013
↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level
=/ H/ L indicates that the provider's measure does not differ/ is higher/ is lower compared to the sector average in 2013

Figure 75: Satisfaction with the customer service advisor/ 2

% satisfied (giving a rating of 7-10)	Sector average		BT TV		Sky		Virgin Media	
Measure 4	2012	2013	2012	2013	2012	2013	2012	2013
Keeping you informed throughout the process	67	75↑	N/A	61	70	78↑	61	73↑
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				*L*		=		=
Measure 5	2012	2013	2012	2013	2012	2013	2012	2013
Adviser doing what they said they would do	69	77↑	N/A	59	71	80↑	65	78↑
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				*L*		=		=
Measure 6	2012	2013	2012	2013	2012	2013	2012	2013
Logging of query details to avoid having to repeat yourself	59	69↑	N/A	56	62	72↑	54	69↑
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		=

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 (prompted responses, single coded)
Base: All UK households contacting Pay TV provider (In 2013 – 1103 Total 100 BT TV, 503 Sky, 500 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013
↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level
=/ H/ L indicates that the provider's measure does not differ/ is higher/ is lower compared to the sector average in 2013

Satisfaction with other aspects of customer service

There has been an increase in satisfaction for offering compensation or a goodwill payment

Figure 76 shows the percentage of satisfied customers for more general customer service attributes. While most customers who contacted their pay TV provider were satisfied with the willingness to help resolve the issue (74%), fewer were satisfied with the provider offering compensation or a goodwill payment (38%). In 2013, no pay TV provider differs from the sector averages for either of these measures.

Compared to 2012, there has been an increase in satisfaction for offering compensation or a goodwill payment (38% vs. 27%); with this due to an increase in satisfaction among Sky customers (38% vs. 30%) and Virgin Media customers (39% vs. 23%). While the sector average is unchanged since 2012 for satisfaction with willingness to help resolve your issue, it has increased for Virgin Media customers (75% vs. 66% in 2012).

Figure 76: Satisfaction with other aspects of customer service

% satisfied (giving a rating of 7-10)	Sector average		BT TV		Sky		Virgin Media	
Measure 1	2012	2013	2012	2013	2012	2013	2012	2013
Offering compensation or a goodwill payment	27	38↑	N/A	32	30	38↑	23	39↑
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		=
Measure 2	2012	2013	2012	2013	2012	2013	2012	2013
Willingness to help resolve your issue	69	74	N/A	65	71	75	66	75↑
PROVIDER LEVEL VS. 2013 SECTOR AVERAGE				=		=		=

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 (prompted responses, single coded)
Base: All UK households contacting Pay TV provider (In 2013 – 1103 Total, 100 BT TV, 503 Sky, 500 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013
↑↓ indicates significant increase/ decrease compared to 2012 at the 99% confidence level
=/ H/ L indicates that the provider's measure does not differ/ is higher/ is lower compared to the sector average in 2013

Future use of provider based on experience

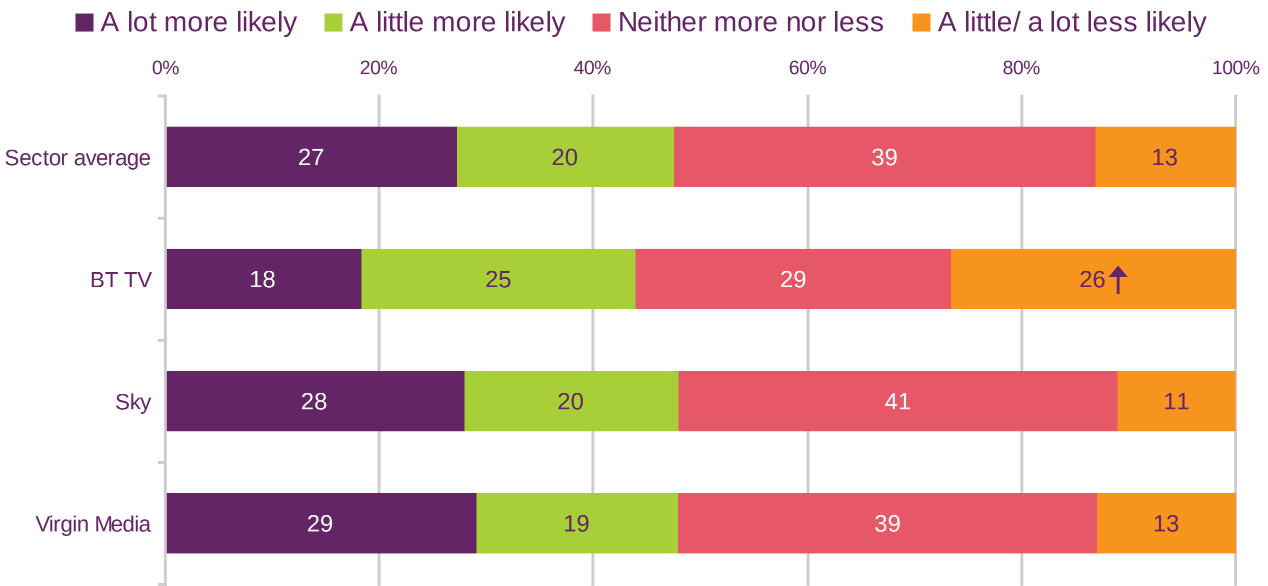
Virgin Media customers are now more likely to say they would use their provider in the future as a result of their recent customer service experience

Customers contacting their pay TV provider were asked whether their most recent customer service experience has made them more or less likely to use their pay TV provider in the future. Results are shown at an overall level and by provider for 2012 and 2013 in Figure 77

There has been no change compared to 2012 in these measures for the pay TV sector overall. Fewer Virgin Media customers say they are a little or a lot less likely to use their provider in future (13% vs. 23% in 2012) and are more likely to say they would use their provider again (29% vs. 21% in 2012).

Among all customers contacting their pay TV provider, more than one in four said they were now a lot more likely to use their pay TV provider again (27%) while one in eight said they were now a little or a lot less likely (13%). Compared to these sector averages, in 2013 it is more common for BT TV customers to say they are less likely to use their provider in future (26% vs. 13%).

Figure 77: Future use of provider given customer service experience - pay TV: 2012 and 2013



Q7. Has your experience of [PROVIDER]'s customer service for this issue made you more or less likely to use [PROVIDER] in the future? (prompted responses, single coded)
Base: All UK households contacting Pay TV provider (In 2013 – 1103 Total, 100 BT TV, 503 Sky, 500 Virgin Media)
Source: Ofcom research, online survey, fieldwork carried out by Saville Rossiter-Base in October 2013.

↑↓ indicates significantly higher/ lower for 'A lot more likely' or 'less likely' than sector average at the 99% confidence level.

Annex 1 – Table of figures

Annex 2 – Stage 1 and Stage 2 questionnaires

Changes to the questionnaire in 2013

One change was made to the questionnaire at this wave: BT TV was added as a provider in the pay TV sector, with sufficient customers making contact interviewed at Stage 1 for weighting at Stage 2.

Changes to the questionnaire at previous waves are detailed below:

- While BT TV was added as a provider in the pay TV sector at Wave 4, the omnibus sample of customers who had contacted BT TV in the three months prior to the interview 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.

Stage 1 questionnaire – telephone omnibus

ASK ALL / SINGLE CODE

Q.1 Which company does your household use for normal, landline telephone calls?
IF NECESSARY - 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
6. DK. Don't Know

ASK ALL / SINGLE CODE

Q.2 And thinking of your personal mobile phone, which network are you on?
IF NECESSARY - So not one that might be provided to you by your work. If you have more than one mobile phone network provider, please tell me about the one you use most often.
IF ANSWER 'EE' CHECK – Before using EE did you get your mobile phone service from Orange or from T-Mobile, so you're now using the EE network without changing to a new network? IF YES – CODE UNDER 'ORANGE' OR 'T-MOBILE' AS APPROPRIATE, IF NO – CODE EE UNDER 'OTHER'

1. O2
2. Orange
3. T-Mobile
4. 3
5. Virgin Mobile

6. Vodafone
7. Don't have a personal mobile
8. Other
9. DK. Don't Know

ASK ALL / SINGLE CODE

Q.3 Which company does your household use for its fixed broadband Internet connection?
IF NECESSARY - 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 fixed broadband
7. Other
8. DK. Don't Know

ASK ALL / SINGLE CODE

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

ASK FOR ALL COMPANIES CODED AT Q.1/2/3/4 (Q.1 CODES 01-04, Q.2 CODES 01-06, Q.3 CODES 01-05, Q.4 CODES 01-03) BUT ONLY ASK EACH COMPANY ONCE IF USED FOR MORE THAN ONE PRODUCT:

SINGLE CODE

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

ASK FOR BT IF Q.1 CODE 01 OR Q.3 CODE 01 OR Q.4 CODE 03
ASK FOR VIRGIN IF Q.1 CODED 02 OR Q.2 CODED 05 OR Q.3 CODED 05 OR Q.4 CODED 02
ASK FOR TALKTALK/AOL/ TISCALI IF Q.1 CODED 03 OR Q.3 CODED 04
ASK FOR SKY IF Q.1 CODED 04 OR Q.3 CODED 03 OR Q.4 CODED 01
ASK FOR O2 IF Q.2 CODED 01
ASK FOR ORANGE IF Q.2 CODED 02 OR Q.3 CODED 02
ASK FOR T MOBILE IF Q.2 CODED 03
ASK FOR 3 IF Q.2 CODED 04
ASK FOR VODAFONE IF Q.2 CODED 06

1. Yes
2. No
3. DK

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

- BT IF USE BT AT 2 OR MORE OF Q.1/3/4 AND CODE 01 FOR BT AT Q.6
- TALKTALK IF USE TALKTALK AT Q.1 AND Q.3 AND CODE 01 FOR TALKTALK AT Q.6
- ORANGE IF USE ORANGE AT Q.2 AND Q.3 AND CODE 01 FOR ORANGE AT Q.6
- VIRGIN IF USE VIRGIN AT 2 OR MORE OF Q.1/2/3/4 AND CODE 01 FOR VIRGIN AT Q.6
- SKY IF USE SKY AT 2 OR MORE OF Q.1/3/4 AND CODE 01 FOR SKY AT Q.6

MULTICODE – ONLY SHOW RELEVANT SERVICES TO INTERVIEWER

Q.7 Thinking now of the MOST RECENT issue you had to contact [COMPANY] about, which of the services that you buy from them was it relating to, was it for [LIST SERVICES USED], or was it a general issue that applies to all?

1.	Landline phone	(FROM Q.1)
2.	Mobile phone	(FROM Q.2)
3.	Broadband	(FROM Q.3)
4.	Cable, satellite or other pay TV	(FROM Q.4)
4.	General issue	
5.	Don't Know	

ASK Q.8 and 9 FOR ALL COMPANIES CODED AT Q.1/2/3/4 (Q.1 CODES 01-04, Q.2 CODES 01-06, Q.3 CODES 01-05, Q.4 CODES 01-03) AND CODED 01 AT Q.6 BUT ONLY ASK EACH COMPANY ONCE IF USED FOR MORE THAN ONE PRODUCT:

- ASK FOR BT IF Q.1 CODE 01 OR Q.3 CODE 01 OR Q.4 CODED 03 AND Q.6 CODE 01
- ASK FOR VIRGIN IF Q.1 CODES 02 IF Q.2 CODED 05 OR Q.3 CODED 05 OR Q.4 CODED 02 AND Q.6 CODE 01
- ASK FOR TALKTALK/AOL/TISCALI IF Q.1 CODED 03 OR Q.3 CODED 04 AND Q.6 CODE 01
- ASK FOR SKY IF Q.1 CODED 04 OR Q.3 CODED 03 OR Q.4 CODED 01 AND Q.6 CODE 01
- ASK FOR O2 IF Q.2 CODED 01 AND Q.6 CODE 01
- ASK FOR ORANGE IF Q.2 CODED 02 OR Q.3 CODED 02 AND Q.6 CODE 01
- ASK FOR T-MOBILE IF Q.2 CODED 03 AND Q.6 CODE 01
- ASK FOR 3 IF Q.2 CODED 04 AND Q.6 CODE 01
- ASK FOR VODAFONE IF Q.2 CODED 06 AND Q.6 CODE 01

SINGLE CODE, PROMPTED, ROTATE ORDER (EXCEPT 07 WHICH IS ALWAYS LAST)

Q.8 And thinking of the most recent issue you had to contact [COMPANY] about, which one 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

Stage 2 questionnaire – online panel

	INTRODUCTION
	Thank you for agreeing to take part in this survey. This research is being conducted to assess the standards of customer service that UK providers of mobile, fixed line, broadband and pay TV services offer to their customers. The interview should take approximately 5-6 minutes to complete. Please click here to begin
S1	**ASK ALL**
SINGLE CODE	Standard panel question to record exact age CLOSE IF UNDER 18
S2	**ASK ALL**
SINGLE CODE	Standard panel question to record gender
S3	**ASK ALL**
SINGLE CODE PER PROVIDER	Which company does your household use for the following services, if any?

A. Landline telephone calls
B. Fixed 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 or other pay 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)

SHOW ONLY RELEVANT CODES FOR EACH SERVICE

Code frame (list alphabetically)	Landline telephone calls	Broad-band internet	Cable / Satellite TV	Personal mobile phone
1. BT	Y	Y		
2. Virgin	Y	Y	Y	Y
3. TalkTalk / AOL / Tiscali	Y	Y		
4. Sky	Y	Y	Y	
5. O2				Y
6. Orange		Y		Y
7. Vodafone				Y
8. T-Mobile				Y
9. 3/Three				Y
10. BT TV				Y
11. Other	Y	Y	Y	Y
12. Don't use this service	Y	Y	Y	Y

	CLOSE IF 'OTHER' OR 'DO NOT USE' CODED FOR EVERY SERVICE
S4	**ASK ALL USING AT LEAST ONE ELIGIBLE PROVIDER**
SINGLE CODE	Thinking of [PROVIDER] and the services you buy from them, have you contacted them in the last 3 months **by telephone or email**? REPEAT FOR ALL ELIGIBLE PROVIDERS IN A LOOP USING AT S3, ASK ONLY ONCE FOR EACH PROVIDER, EVEN IF USE MORE THAN ONE SERVICE FROM THEM 1. Yes 2. No IF S4= 2 (NO) FOR ALL PROVIDERS SCREEN OUT
S5	**ASK IF USE ANY PROVIDER FOR MORE THAN ONE SERVICE AT S3, AND HAVE CONTACTED THEM AT S4**
MULTI CODE	Thinking of the most recent issue that you had to contact [PROVIDER] about, which of the services that you buy from them was it relating to? Please tick all that apply. SHOW ONLY SERVICES BEING USED BY THE RESPONDENT 1. Landline telephone calls 2. Broadband internet 3. Cable/Satellite TV 4. Mobile phone services (not including mobile broadband)
S6	**ASK FOR ALL PROVIDERS CONTACTED (S4=1). IF NO PROVIDERS CONTACTED (S4=1), CLOSE**
SINGLE CODE	And thinking of the most recent issue that you had to contact [PROVIDER] about, which of the following categories did the issue fall into? ROTATE ORDER OF OPTIONS, WITH THE EXCEPTION OF CODE 7, WHICH IS ALWAYS THE LAST 1. A billing, pricing or payment issue 2. A problem with your account details, for example name and address etc. 3. A fault with the service you are buying from them, for example total or partial failure of service 4. The service not performing as well as expected, for example issues with picture quality, broadband speed, mobile coverage etc. 5. Problems with the repair service, for example it didn't happen or didn't solve the problem 6. A problem relating to the installation or set up of your service 7. Or something else, a general issue

S7A-C	ASK FOR ALL PROVIDERS CONTACTED (S4=1)
SINGLE CODE	And more specifically, which of the following best describes what the issue with [PROVIDER] was concerning? ROTATE CODES WITHIN EACH HEADING, EXCEPT FOR 'A DIFFERENT ISSUE' WHICH IS ALWAYS LAST RESPONDENT IS ONLY SHOWN CODES RELATING TO THE SERVICE THEY USE THE PROVIDER FOR, OR IF CALL WAS RELATING TO MULTIPLE SERVICES, THEN FOR ALL THOSE SERVICES. CODES ARE RELEVANT TO ALL SERVICES UNLESS MARKED SPECIFICALLY IN BRACKETS AFTERWARDS. **A. Billing (USE THIS LIST IF CODES 1 OR 2 AT S6)** 1. Bill was inaccurate 2. Bill contained items I shouldn't have been charged for 3. Pre-pay credit lost or not credited to card (MOBILE) 4. Costs of international and roaming calls (MOBILE) 5. Needed help to understand the bill 6. Bill was a lot higher than expected 7. The format of the bill 8. Payment issues (including setting up/making a payment, non-direct debit charges) 9. Account details (name, address, tariff, package etc.) 10. Getting a refund, credit note or cashback 11. A different issue (please describe it briefly in your own words) _____ **B. Faults and repairs (USE THIS LIST IF CODES 3,4,5 AT S6)** 1. Poor line quality (LANDLINE) 2. Poor reception/coverage (MOBILE) 3. Text or voice mails delivered late (MOBILE) 4. Problems with calls being disconnected during a call or not connected at all (MOBILE) 5. Arranging an appointment for an engineer visit (LANDLINE/BROADBAND/PAY TV) 6. Complaining about an engineer (LANDLINE/BROADBAND/PAY TV) 7. Time taken to repair a fault 8. Connection speed too slow (BROADBAND) 9. Problems with voice over internet (VOIP) telephone calls (BROADBAND) 10. A different issue (please describe it briefly in your own words) _____ **C. General enquiries (USE THIS LIST IF CODE 6 & 7 AT S6)** 1. Mis-selling 2. Keeping your mobile phone number when changing suppliers (MOBILE) 3. Time taken to install the service (LANDLINE/BROADBAND/PAY TV) 4. Damage to property during installation or repair (LANDLINE/BROADBAND/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) _____

S8	RECORD FOR ALL PROVIDERS CONTACTED (S4=1)
MULTI-CODE	RECORD ELIGIBLE QUOTA TYPE FOR SERVICE PROVIDER(S):

	Landline telephone calls	**Broadband internet**	**Cable / Satellite TV**	**Personal mobile phone**
1. BT	A. Billing B. Fault C. General	A. Billing B. Fault C. General		
2. Virgin	A. Billing B. Fault C. General	A. Billing B. Fault C. General	A. Billing B. Fault C. General	A. Billing B. Fault C. General
3. TalkTalk / AOL / Tiscali	A. Billing B. Fault C. General	A. Billing B. Fault C. General		
4. Sky	A. Billing B. Fault C. General	A. Billing B. Fault C. General	A. Billing B. Fault C. General	
5. O2				A. Billing B. Fault C. General
6. Orange		A. Billing B. Fault C. General		A. Billing B. Fault C. General
7. Vodafone				A. Billing B. Fault C. General
8. T-Mobile				A. Billing B. Fault C. General
9. 3				A. Billing B. Fault C. General
10. BT TV			A. Billing B. Fault C. General	

DUMISSUETYPE – S6:
A. BILLING=S6=1-2
B. FAULT=S6=3-5
C. GENERALS6=6-7

SERVICE SATISFACTION
– ASK THIS SECTION FOR EACH ELIGIBLE PROVIDER IN TURN

Q1	**ASK FOR ALL PROVIDERS CONTACTED AT S4, AND SEPARATELY FOR EACH SERVICE USED (SO MULTIPLE TIMES FOR BUNDLED PROVIDERS)**
SINGLE CODE	Overall how satisfied would you say you are with [PROVIDER] as your provider of [SERVICE] on a 1 to 10 scale where 10 means you are extremely satisfied, and 1 means you are extremely dissatisfied? 10 – Extremely satisfied 9 8 7 6 5 4 3 2 1 – Extremely dissatisfied
Q2	**ASK ALL – ONLY ONCE PER PROVIDER CONTACTED, REGARDLESS OF BUNDLING**
SINGLE CODE	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
Q3	**ASK ALL – ONLY ONCE PER PROVIDER CONTACTED, REGARDLESS OF BUNDLING**
SINGLE CODE	Overall, how satisfied are you with the service you received from [PROVIDER] customer services on this occasion? Please give your rating on a scale from '1' to '10', where '10' means that you are extremely satisfied and '1' means you are extremely dissatisfied? 1. Extremely dissatisfied 2. 3. 4. 5. 6. 7. 8. 9. 10. Extremely satisfied

Q4	**ASK ALL – ONLY ONCE PER PROVIDER CONTACTED, REGARDLESS OF BUNDLING**
SINGLE CODE	And how satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied. **NB: If a statement does not apply to the contact you made, please select, 'Not applicable'** RANDOMISE WITHIN EACH HEADING. SCREEN 1: Contacting… A. Ease of finding provider contact details B. Calling back when they said they would C. Ease of getting through to the right person (PHONE) Speed… D. Speed of answering phones (PHONE) E. The time taken to handle your issue Standard of advice… F. Advice/information was easy to understand G. Advice/information was useful H. Getting the issue resolved to your satisfaction SCREEN 2: advisor… I. Courtesy and politeness of advisors J. advisor ability to understand the issue and identify the problem K. advisor took my question/issue seriously L. Keeping you informed throughout the process M. advisor 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
Q5	**ASK ALL – ONLY ONCE PER PROVIDER CONTACTED, REGARDLESS OF BUNDLING**
SINGLE CODE	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

Q5a	ASK ALL – ONLY ONCE PER PROVIDER CONTACTED, REGARDLESS OF BUNDLING
SINGLE CODE	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
Q6	**ASK ALL – ONLY ONCE PER PROVIDER CONTACTED, REGARDLESS OF BUNDLING**
SINGLE CODE	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
Q7	**ASK ALL – ONLY ONCE PER PROVIDER CONTACTED, REGARDLESS OF BUNDLING**
SINGLE CODE	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
Q8	**ASK ALL – ONLY ONCE PER PROVIDER CONTACTED, REGARDLESS OF BUNDLING**
SINGLE CODE	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

CL1	**ASK ALL MOBILE OWNERS WHO HAVE ANSWERED ABOUT A CUSTOMER SERVICE EVENT FOR AN ELIGIBLE MOBILE NETWORK AT S3D**
SINGLE CODE	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
CL2	**ASK ALL**
SINGLE CODE	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
CL3	**ASK ALL**
SINGLE CODE	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
CL4	**ASK ALL**
SINGLE CODE	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

CL5	ASK ALL
MULTI CODE	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
	SAY TO ALL
	Thank you for your time. These are all the questions we have for you. All your answers will be used to help us assess the level of services currently provided. Please be assured that all your responses will be used anonymously.

Annex 3 - Sample profile

Unweighted profile of the telephone omnibus survey data used for weighting – 3007 interviews[54]

Fixed Line	Billing	Faults / Repairs	General queries	Total
BT	18.5%	11.0%	21.6%	51.1%
Virgin	8.0%	5.0%	6.8%	19.8%
Talk Talk/AOL/Tiscali	3.8%	6.3%	6.3%	16.3%
Sky	3.8%	3.5%	5.5%	12.8%
Total	34.0%	25.8%	40.1%	100.0%
			base:	*398*

Mobile	Billing	Faults / Repairs	General queries	Total
Virgin	2.2%	0.6%	2.6%	5.4%
O2	8.7%	3.9%	13.1%	25.6%
Orange	9.5%	5.1%	9.1%	23.7%
Vodafone	6.6%	4.0%	11.9%	22.4%
T-Mobile	4.0%	1.9%	6.3%	12.2%
3/Three	1.4%	2.6%	6.6%	10.6%
Total	32.4%	18.1%	49.5%	100.0%
			base:	*622*

Broadband	Billing	Faults / Repairs	General queries	Total
BT	9.6%	12.7%	19.7%	42.1%
Virgin	6.5%	9.4%	4.7%	20.6%
TalkTalk	3.7%	7.0%	6.5%	17.1%
Sky	3.5%	6.6%	6.1%	16.2%
Orange	1.4%	2.1%	0.5%	4.0%
Total	24.6%	37.9%	37.5%	100.0%
			base:	*573*

TV	Billing	Faults / Repairs	General queries	Total
Virgin	8.0%	9.0%	9.2%	26.3%
Sky	18.7%	16.3%	27.7%	62.8%
BT TV	0.7%	4.6%	5.6%	10.9%
Total	27.5%	29.9%	42.6%	100.0%
			base:	*410*

[54] Orange broadband data was not weighted to this profile, due to insufficient sample achieved at this stage

Customer service experiences from the online panel survey – 6112 experiences

TV	Fixed Line	Mobile	Broadband	Pay TV
BT	302		404	
Virgin	300	201	401	500
TalkTalk	301		402	
Sky	301		401	503
O2		400		
Orange		400	195[55]	
Vodafone		400		
T-Mobile		401		
3/Three		200		
BT TV				100

[55] The original target of 200 customer service experiences for customers of Orange Broadband was not reached at Wave 5. All other targets were reached.