

Triple play switching, online research

Main findings

Published: 29th July 2016

- **Research objectives and methodology**
 - Background, method and objectives
 - Sample structure, switching sub-groups and definitions
 - Questionnaire topics and structure

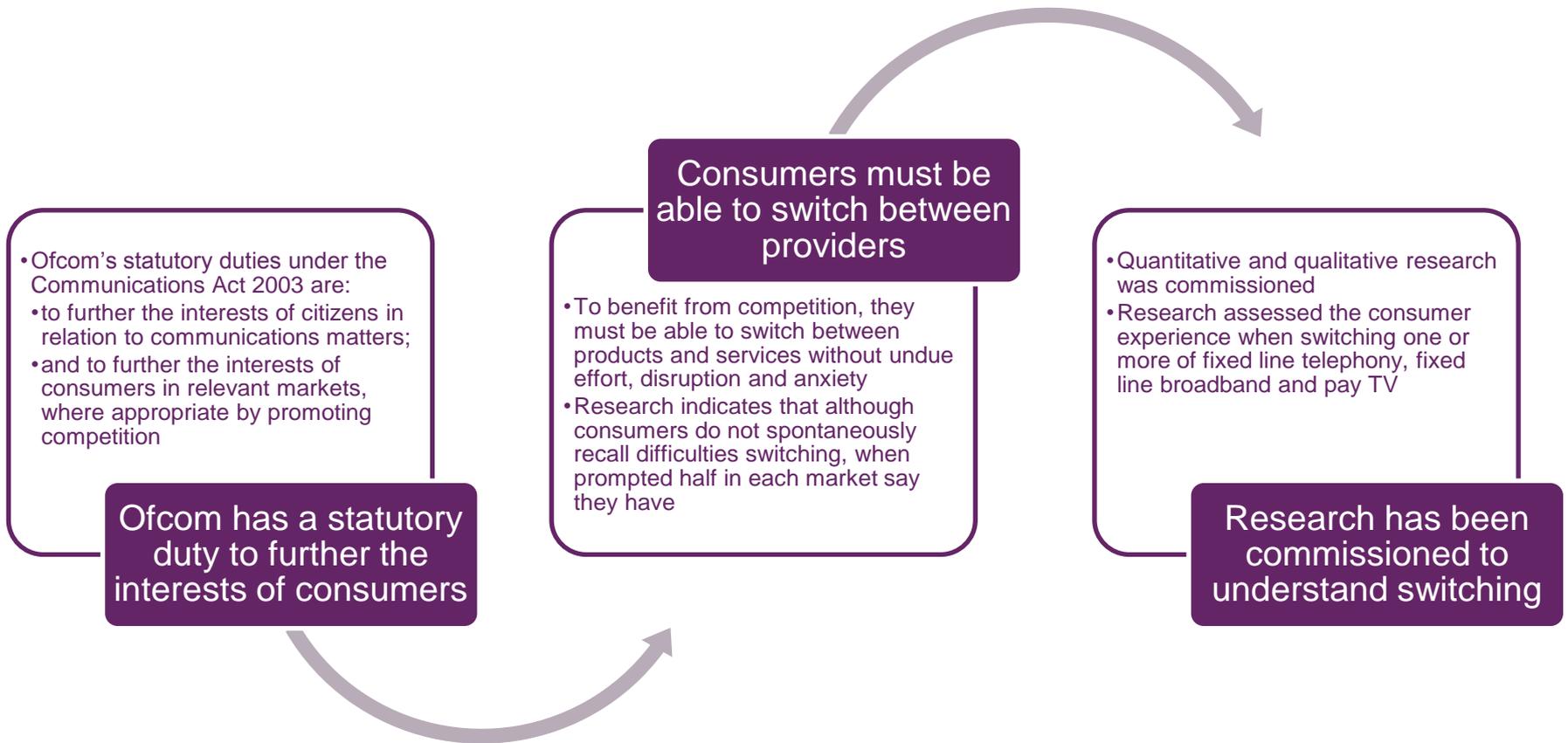
- **Contextual findings**
 - Switching motivations
 - Methods of finding out how to switch
 - Cancellation preferences, in the future

- **Main findings**
 - Switchers**
 - Activities undertaken when considering/switching
 - Difficulties experienced
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 - Experience of double billing/contract overlap
 - Notice periods, early termination and other charges
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 - Attitude to switching/ease of switching/satisfaction
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 - Provider contact
 - Attitude to switching/ease of switching/satisfaction
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 - Factors impacting decision not to switch/consider switching
 - Attitude to switching/ease of switching

- **Annex**
 - Profile of key sample groups

Research objectives and methodology

Background to research



Data collection



- The main survey was conducted among an online panel sample
- A short face to face survey was also carried out to obtain profile information of the sample key groups, for weighting purposes (see weighting)
- The main study was conducted online which provided an effective and efficient means to reach the audience Ofcom wished to consult
- Fieldwork took place from 22nd October to 16th November 2015
- The overall sample size is 2,529 interviews

Sample



- Quotas were set in order to target a minimum number of interviews per sample group cell for the purposes of analysis
- Additionally the fallout of current/previous Virgin customers among the CPS sample; and the fallout of Virgin, Openreach and Sky and pay TV standalone, triple play and dual play customers among the Non-switching samples was monitored throughout to ensure there were no heavy skews
- The sample was divided into different groups in terms of their recent switching behaviour, services switched and their current and previous provider/s
- (More on the composition of these groups can be found on subsequent slides)

Weighting

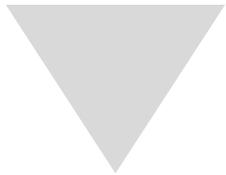


- Online samples can sometimes be biased towards particular types of individuals
- The profile of respondents was therefore compared to data collected from a nationally representative face to face omnibus survey
- The Not switched/ Not considered sample group was found to diverge from the face to face sample on key demographic and attitudinal measures and was therefore weighted to match the face to face profile on these

Information on how to read the statistical differences



Higher than sample group of that colour

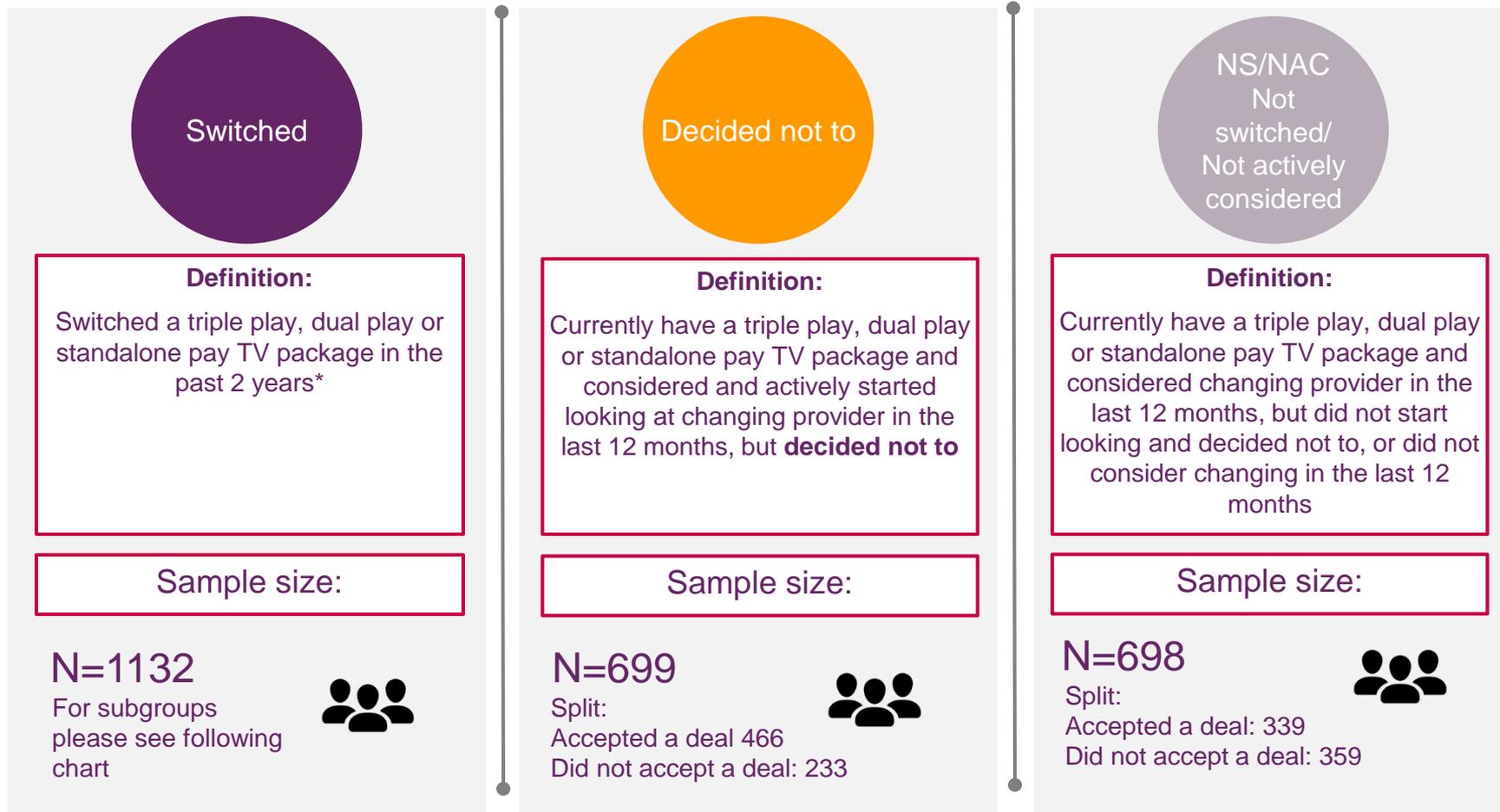


Lower than sample group of that colour

NB: significance testing at 95% level

* Denotes low base and findings should be treated as indicative only = 50 to 100

Sample structure – overall groups

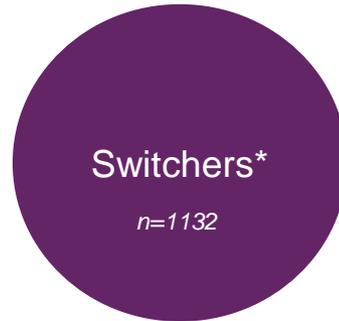


*Switchers were excluded if when they switched they had moved home at the same time; were migrated from Virgin Media National to TalkTalk; or if they had to get a MAC in order to switch broadband

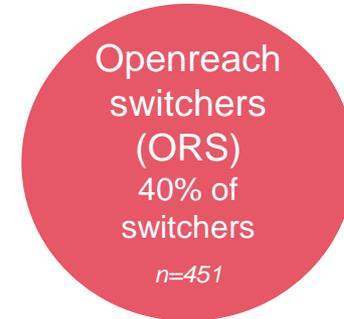
Switching subgroups



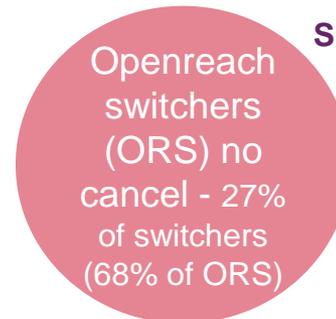
Switched to or from a Virgin triple play or dual play package; or from Sky Triple to Openreach; or to/from Virgin/Sky standalone pay TV



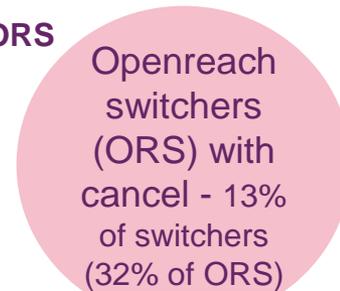
Switched a triple play, dual play or standalone pay TV package in the past 2 years*



Switched a triple play or dual play package to and from a provider on the Openreach network (includes switching to/from Sky Dual and from Openreach to Sky Triple**)



Subsets of ORS



Cancelled with previous provider (E3 or F5 to cancel)

*Respondents were excluded if they switched at the same time as moving home; were migrated from Virgin Media National to TalkTalk; or if they had to get a MAC in order to switch broadband
** While a switch to Sky triple would include a cross platform switch, we would expect consumers to follow a gaining provider led process, which is more aligned with an ORS hence these types of switch have been analysed within ORS.

Definition of 'decided not to switch' and 'not considered switching'



To qualify for interview as a 'decided not to' respondent had to fulfil the following criteria:

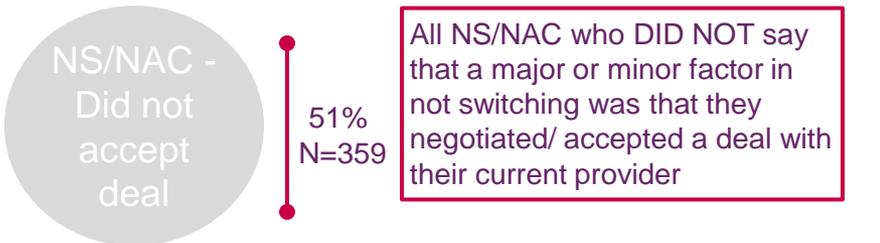
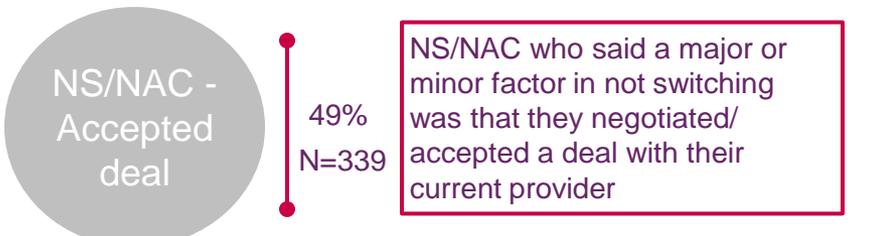
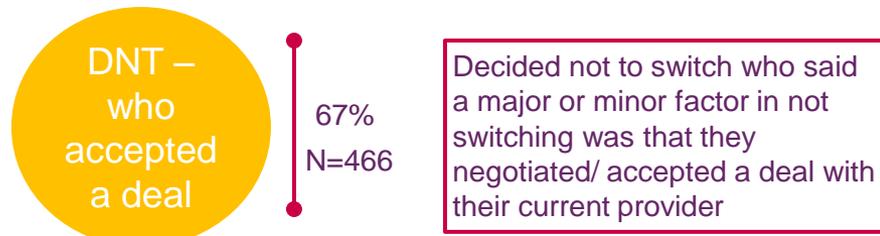
- Currently have a triple play, dual play or standalone pay TV package
- Have considered and actively started looking at changing provider in the last 12 months, but **decided not to**

To qualify for interview as a 'not switched/ not actively considered' respondent they had to fulfil the following criteria:

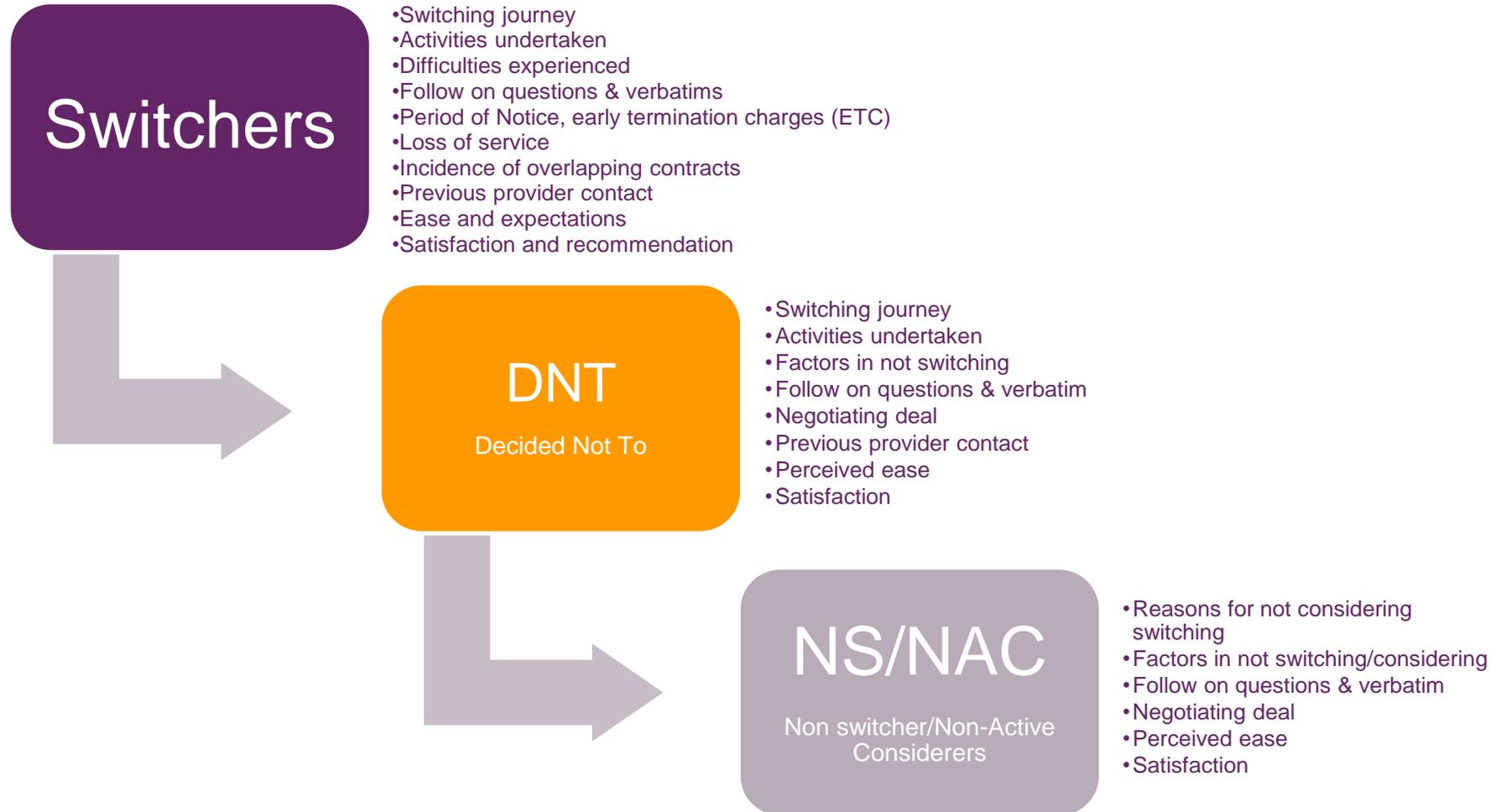
- Currently have a triple play, dual play or standalone pay TV package
- Have considered changing provider in the last 12 months, but did not start looking and decided not to, or did not consider changing in the last 12 months



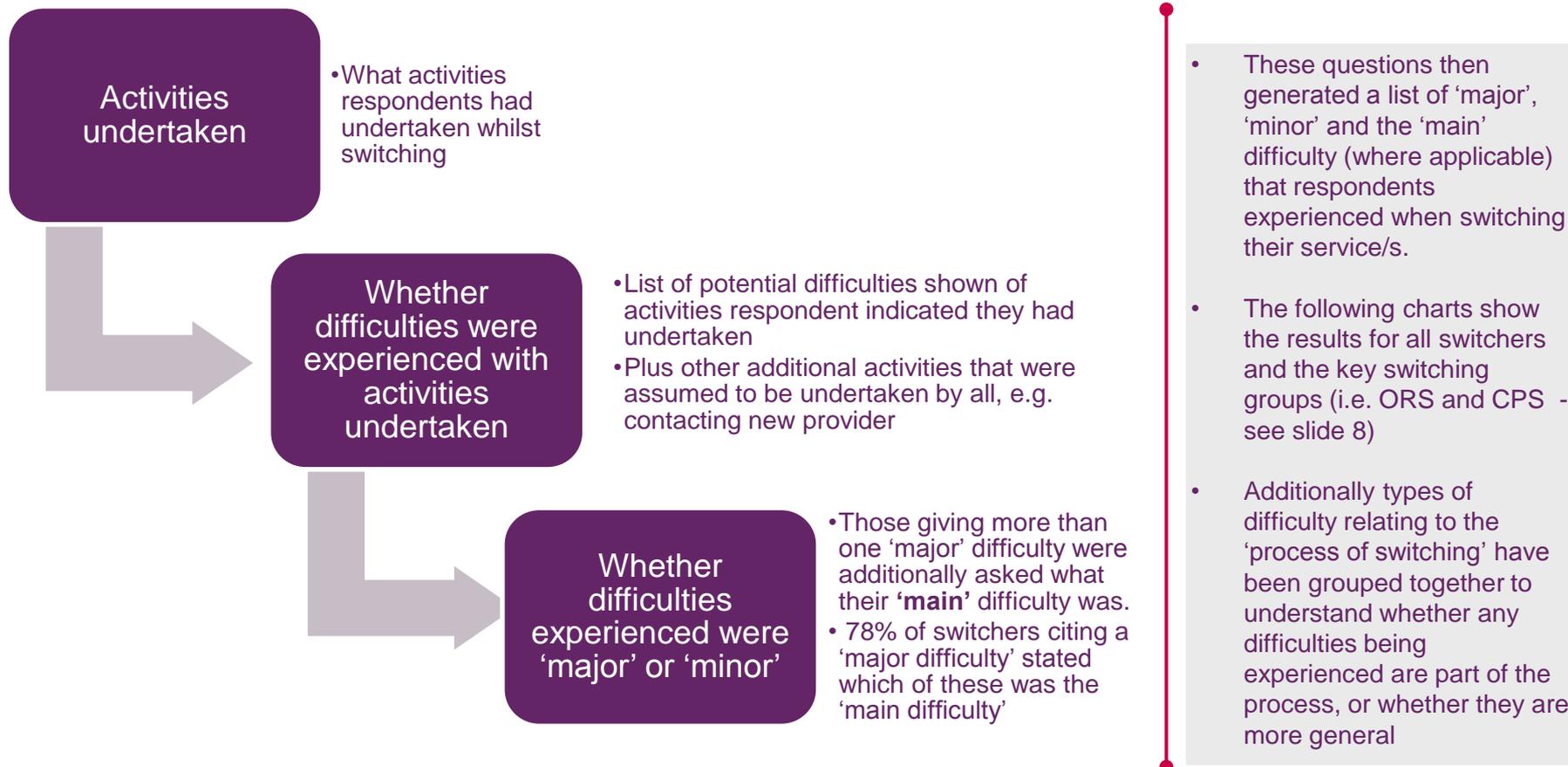
Sub-groups of overall samples



Research covered the following areas:



Questionnaire structure around 'difficulties'



NB: Only those respondents who noted a major difficulty/factor were asked which of these was the main difficulty/factor...and respondents were able to state 'no main'

NB: Analysis of difficulties among the NS/NAC group is focussed on 'main' only. We consider a conservative approach to analysis is appropriate for these respondents as their lack of engagement in the market means they are unlikely to have responded on an informed basis.

Contextual findings

What prompted switching/thinking about switching:

	Switched	DNT total	DNT who accepted a deal	DNT who did not accept a deal
Wanted to reduce the cost of services	42%	48%	47%	51%
Found out about a better deal/price with another provider	36%	16%	16%	18%
Previous/current provider increased cost of services	27%	30%	27%	35%
Poor customer service with previous provider	27%	11%	9%	15%
Wanted faster/unlimited broadband services	22%	17%	14%	21%
Technical issues with my previous service	22%	11%	10%	15%
My contract/deal came to an end	18%	20%	24%	10%
I always regularly review what I sign up to, to check that I have the best deal/product	11%	16%	18%	13%
Wanted the convenience of getting all services from one provider	10%	8%	8%	10%
Wanted additional content or channels	9%	6%	6%	6%
Friends and family mentioned a deal	8%	8%	8%	8%
Wanted specific content or channels not available with my previous service (e.g. exclusive sport or movie channels)	7%	3%	3%	4%

Listed mentions of 5% or more of Switched

QC5a. What made you first think about switching your services. Why did you first decide to review your arrangements?

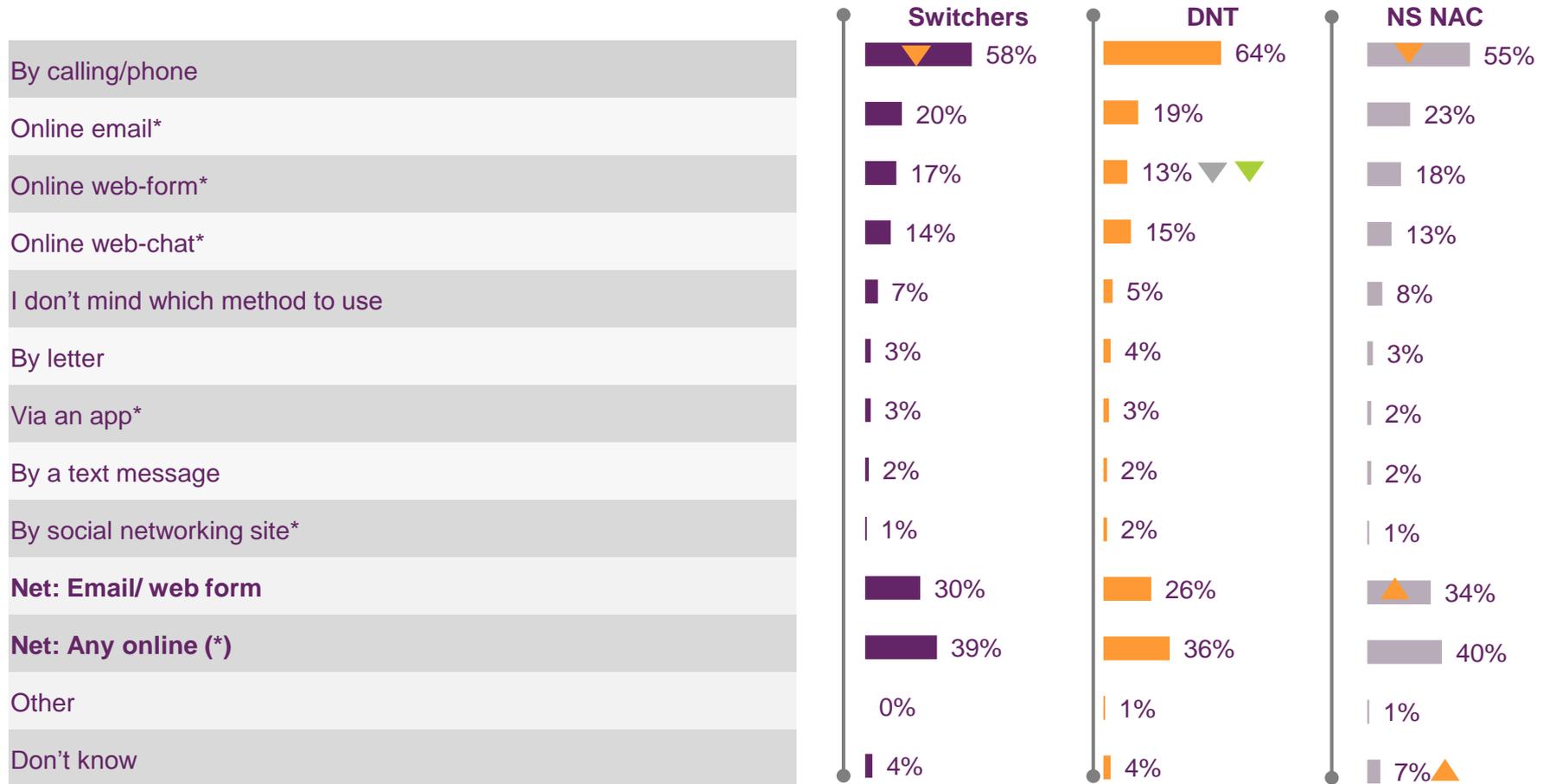
Base: All switched in last 24m (1132), DNT total (699), DNT who accepted a deal (466), DNT who didn't accepted a deal (233)

How found out what needed to do to switch

	Switched	DNT
Spoke to new provider	45%	15%
Looked online at new provider's website	37%	32%
Looked online at comparison website/s	19%	27%
Looked online at previous provider's website	14%	28%
Spoke to previous provider	13%	21%
Knew from previous experience switching the same services	12%	10%
Asked friends/family	12%	12%
Knew from previous experience switching other communications services	10%	8%
Looked online at consumer advice website/s	8%	11%
Knew from previous experience switching other non-communications services	8%	8%

QE1 How did you find out what you needed to do in order to switch?
 Base: All switched in last 24m (1132), DNT total (699)

Preferred method of contacting to cancel a service in the future

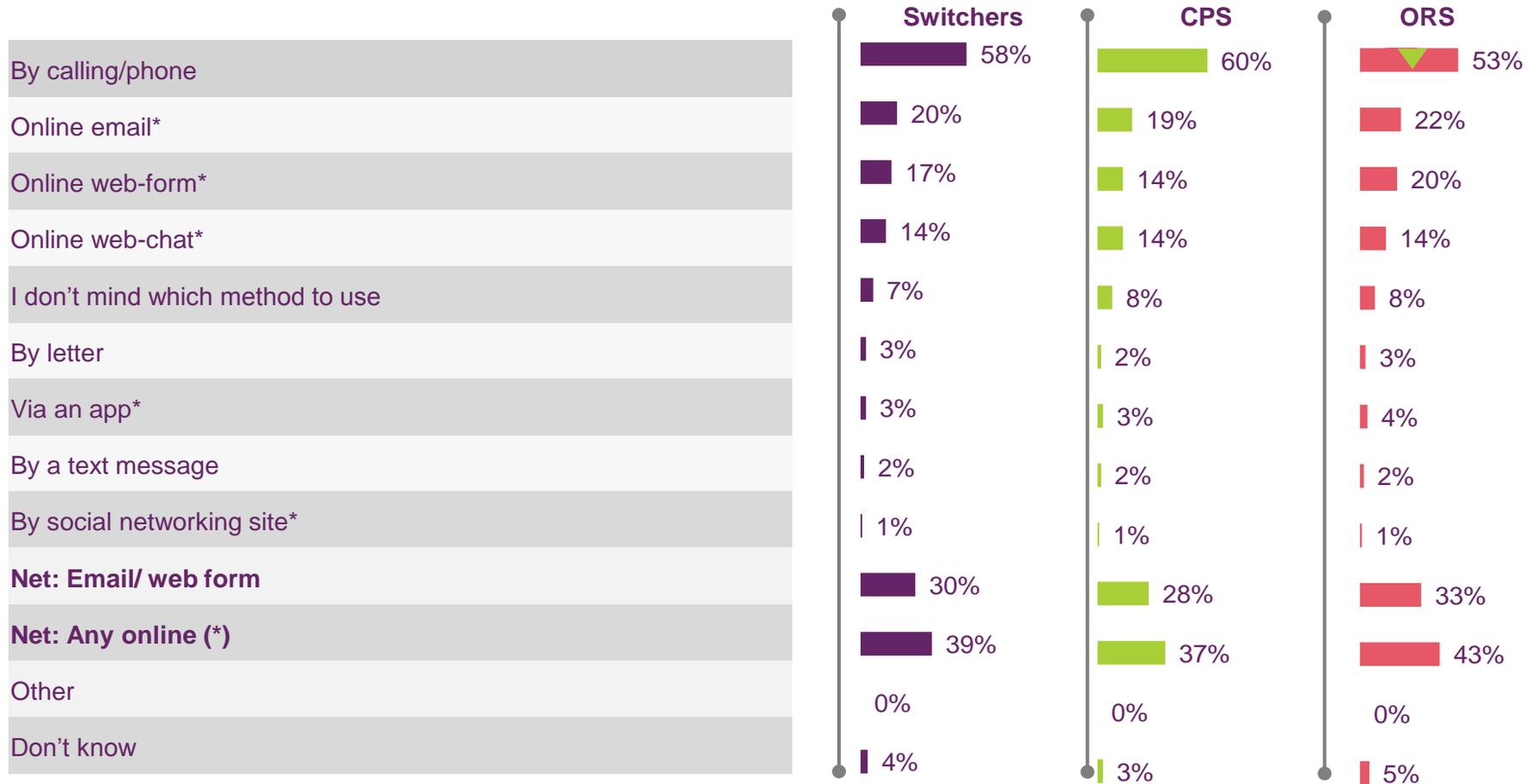


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 Direction of difference by up or down arrow
 Colour to which group the difference applies to

QF8 If you were to switch services in the future and needed to contact your provider to cancel their service, what would be your preferred way of contacting them?

Base: All respondents (2517), Switchers (1132), DNT (699), Non-switcher/Non-active considerer (698)

Preferred method of contacting to cancel a service in the future, by process



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 Direction of difference by up or down arrow
 Colour to which group the difference applies to

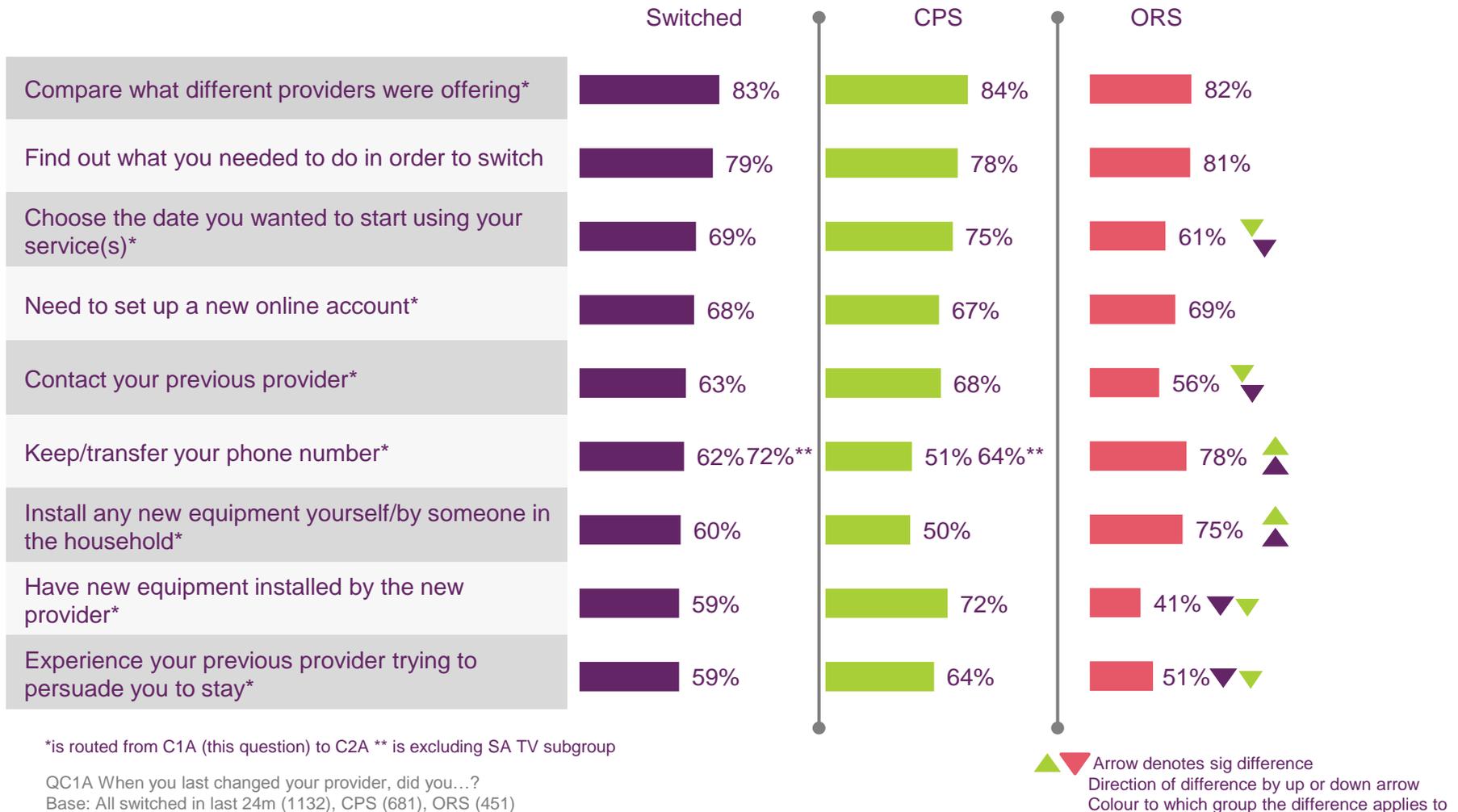
QF8 If you were to switch services in the future and needed to contact your provider to cancel their service, what would be your preferred way of contacting them?

Base: All switched in last 24m (1132), CPS (681), ORS (451)

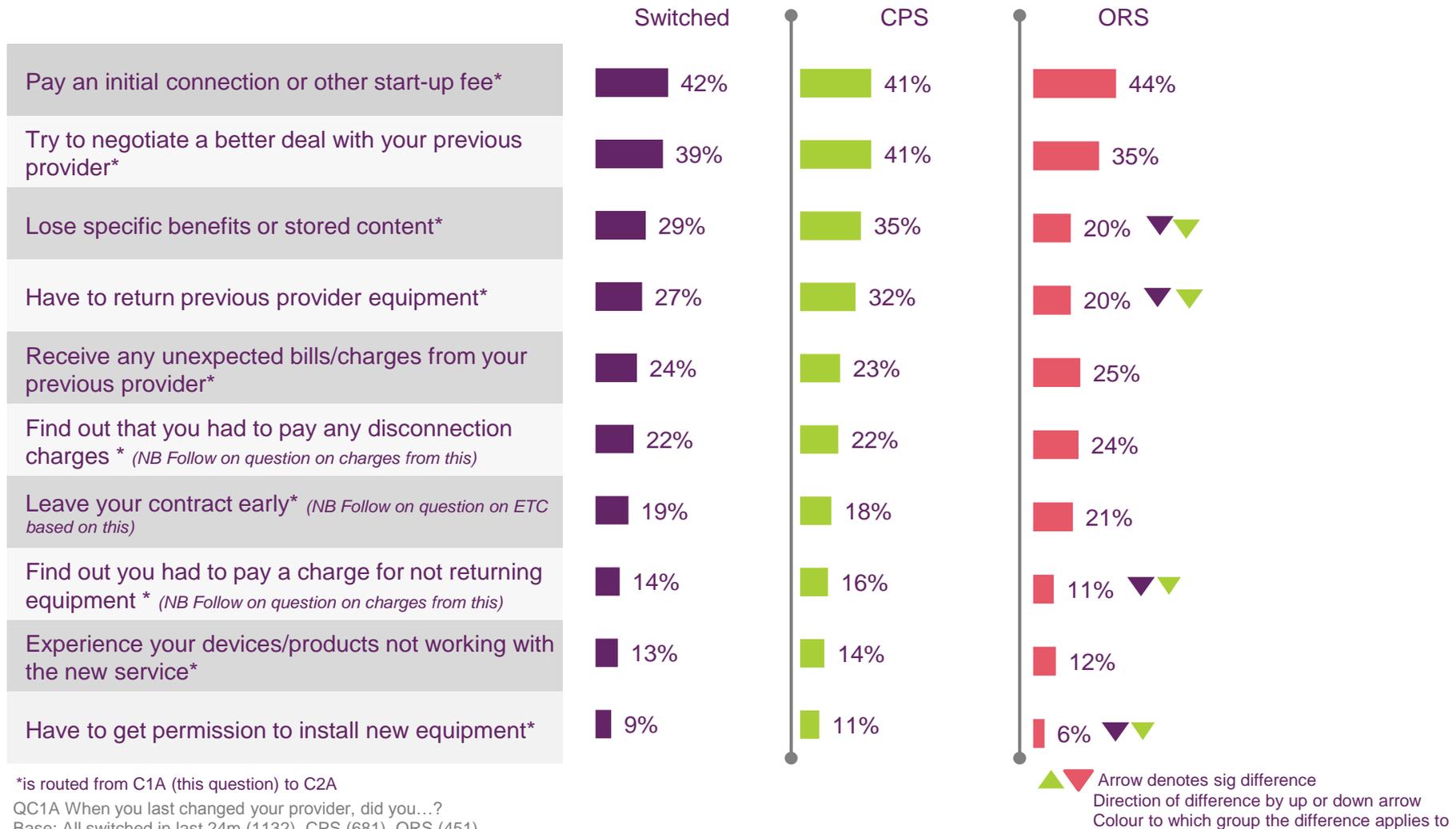
Main findings among switchers:

ACTIVITIES UNDERTAKEN

Activities undertaken by *those that have switched*: (1 of 2)



Activities undertaken by *those that have switched*: (2 of 2)



DIFFICULTIES

Difficulties by Major, Minor, Major & Minor and Main: All Switchers (1 of 2)



Switchers , ordered on major

Note: Major & Minor may not equal the total of Major plus Minor due to rounding

	Major	Minor	Major & Minor	Main*
Getting a better deal with your previous provider*	13%	11%	23%	3%
Resolving billing issue with your previous provider*	11%	8%	19%	5%
Cancelling your previous service	10%	25%	35%	3%
Your previous provider trying to persuade you to stay*	9%	21%	30%	3%
Arranging the switch so that you were not paying for your old and new services at the same time	8%	22%	30%	1%
Contacting your previous provider*	7%	16%	23%	1%
Arranging the switch so that you always had access to your services*	6%	22%	29%	2%
Paying a disconnection charge*	5%	7%	12%	1%
Paying the charge to exit your contract early*	4%	5%	9%	1%
Getting the switch to happen on the date you wanted*	4%	12%	16%	1%
Understanding the relevant steps required to switch provider	3%	22%	25%	1%
Finding time to research the market	3%	23%	27%	1%
Contacting your new provider	3%	12%	15%	1%
Having new equipment installed/services set up by your new provider*	3%	12%	15%	1%
Other devices/products you own not working with the new service*	2%	5%	8%	1%
Paying a charge for not returning equipment*	2%	3%	5%	0%

QC2A And which, if any, of these did you experience difficulty with...?

Base: All switched in last 24m (1132)

* 78% of those citing a major difficulty stated which of these was the main difficulty faced, 7% did not know and 16% were unable to say which of the major factors stood out

* =Routed from activities

Note: Major & Minor may not equal the total of Major plus Minor due to rounding

Difficulties by Major, Minor, Major & Minor and Main: All switchers (2 of 2)

	Major	Minor	Major & Minor	Main*
Comparing what different providers are offering*	2%	19%	21%	1%
Paying an initial connection or other start-up fee, costs for a set top box to new provider etc.*	2%	12%	14%	0%
Receiving and installing new equipment from your new provider yourself*	2%	11%	12%	0%
Returning your previous provider's equipment*	2%	9%	11%	1%
Setting up a new online account*	1%	9%	11%	0%
Keeping/transferring your phone number*	2%	6%	8%	1%
Getting permission to install new equipment*	0%	2%	3%	0%

QC2A And which, if any, of these did you experience difficulty with...?

Base: All switched in last 24m (1132)

* See slide 22

* =Routed from activities

Difficulties by Major, Minor, Major & Minor and Main: CPS (1 of 2)



CPS, ordered on major

Note: Major & Minor may not equal the total of Major plus Minor due to rounding

	Major	Minor	Major & Minor	Main*
Getting a better deal with your previous provider*	12%	12%	24%	3%
Resolving billing issue with your previous provider*	11%	7%	18%	5%
Cancelling your previous service	11%	27%	38%	4%
Your previous provider trying to persuade you to stay*	11%	23%	34%	4%
Arranging the switch so that you were not paying for your old and new services at the same time	8%	26%	34%	1%
Contacting your previous provider*	7%	16%	23%	1%
Arranging the switch so that you always had access to your services*	7%	23%	29%	2%
Paying a disconnection charge*	5%	7%	12%	1%
Paying the charge to exit your contract early*	4%	5%	9%	1%
Getting the switch to happen on the date you wanted*	4%	13%	17%	1%
Understanding the relevant steps required to switch provider	4%	23%	27%	1%
Finding time to research the market	4%	24%	28%	1%
Contacting your new provider	3%	15%	17%	1%
Having new equipment installed/services set up by your new provider*	3%	16%	19%	1%
Other devices/products you own not working with the new service*	2%	6%	8%	1%
Paying a charge for not returning equipment*	2%	4%	6%	0%

QC2A And which, if any, of these did you experience difficulty with...?

Base: All CPS (681) * see slide 22

* =Routed from activities

Note: Major & Minor may not equal the total of Major plus Minor due to rounding

Major Difficulties by Major, Minor, Major & Minor and Main: CPS (2 of 2)

	Major	Minor	Major & Minor	Main*
Comparing what different providers are offering*	2%	21%	23%	0%
Paying an initial connection or other start-up fee, costs for a set top box to new provider etc.*	2%	13%	15%	0%
Returning your previous provider's equipment*	2%	11%	13%	1%
Setting up a new online account*	2%	10%	12%	0%
Receiving and installing new equipment from your new provider yourself*	1%	9%	11%	0%
Keeping/transferring your phone number*	1%	5%	7%	1%
Getting permission to install new equipment*	0%	3%	4%	0%

QC2A And which, if any, of these did you experience difficulty with...?

Base: All CPS (681)

* See slide 22

* =Routed from activities

Major Difficulties by Major, Minor, Major & Minor and Main: ORS (1 of 2)



ORS, ordered on major

Note: Major & Minor may not equal the total of Major plus Minor due to rounding

	Major	Minor	Major & Minor	Main*
Getting a better deal with your previous provider*	14%	8%	22%	4%
Resolving billing issue with your previous provider*	12%	9%	20%	6%
Cancelling your previous service	9%	21%	30%	2%
Your previous provider trying to persuade you to stay*	7%	18%	25%	1%
Arranging the switch so that you were not paying for your old and new services at the same time	7%	15%	22%	1%
Contacting your previous provider*	7%	15%	22%	1%
Arranging the switch so that you always had access to your services*	6%	22%	27%	2%
Paying a disconnection charge*	5%	8%	13%	1%
Paying the charge to exit your contract early*	4%	5%	9%	1%
Getting the switch to happen on the date you wanted*	4%	10%	14%	1%
Understanding the relevant steps required to switch provider	3%	20%	23%	1%
Finding time to research the market	2%	22%	25%	1%
Contacting your new provider	2%	9%	11%	0%
Having new equipment installed/services set up by your new provider*	2%	6%	8%	1%
Other devices/products you own not working with the new service*	2%	5%	8%	1%
Comparing what different providers are offering*	2%	17%	19%	0%

QC2A And which, if any, of these did you experience difficulty with...?

Base: All ORS (451) * see slide 22

* =Routed from activities

Note: Major & Minor may not equal the total of Major plus Minor due to rounding

Major Difficulties by Major, Minor, Major & Minor and Main: ORS (2 of 2)

	Major	Minor	Major & Minor	Main*
Receiving and installing new equipment from your new provider yourself*	2%	13%	14%	0%
Paying an initial connection or other start-up fee, costs for a set top box to new provider etc.*	2%	11%	13%	1%
Keeping/transferring your phone number*	2%	7%	9%	1%
Paying a charge for not returning equipment*	1%	2%	3%	0%
Returning your previous provider's equipment*	1%	7%	8%	0%
Setting up a new online account*	1%	8%	9%	1%
Getting permission to install new equipment*	0%	1%	1%	0%

QC2A And which, if any, of these did you experience difficulty with...?

Base: All ORS (451)

* See slide 22

* =Routed from activities

Summary of ‘process related’ difficulties

Major process difficulties: CPS & ORS

	Major Difficulties			Minor Difficulties		
	Switchers	CPS	ORS	Switchers	CPS	ORS
Cancelling your previous service	10%	11%	9%	25%	27%	21%
Getting the switch to happen on the date you wanted	4%	4%	4%	12%	13%	10%
Arranging the switch so that you always had access to your services	6%	7%	6%	22%	23%	22%
Arranging the switch so that you were not paying for your old and new services at the same time	8%	8%	7%	22%	26%	15%
Total process	18%	20%	16%	48%	52%	41%

QC2A And which, if any, of these did you experience difficulty with...?
 Base: All switched in last 24m (1132), All switched via CPS (681), ORS (451)

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 Direction of difference by up or down arrow
 Colour to which group the difference applies to

Difficulties experienced: overview by process

	All switched	CPS	ORS
Any major difficulty	41%	42%	38%
Any major process difficulty*	18%	20%	16%
Any minor difficulty	72%	76%	67%
Any minor process difficulty*	48%	52%	41%
Any difficulty (major or minor)	76%	79%	71%
Any difficulty (major or minor) process difficulty*	54%	58%	49%

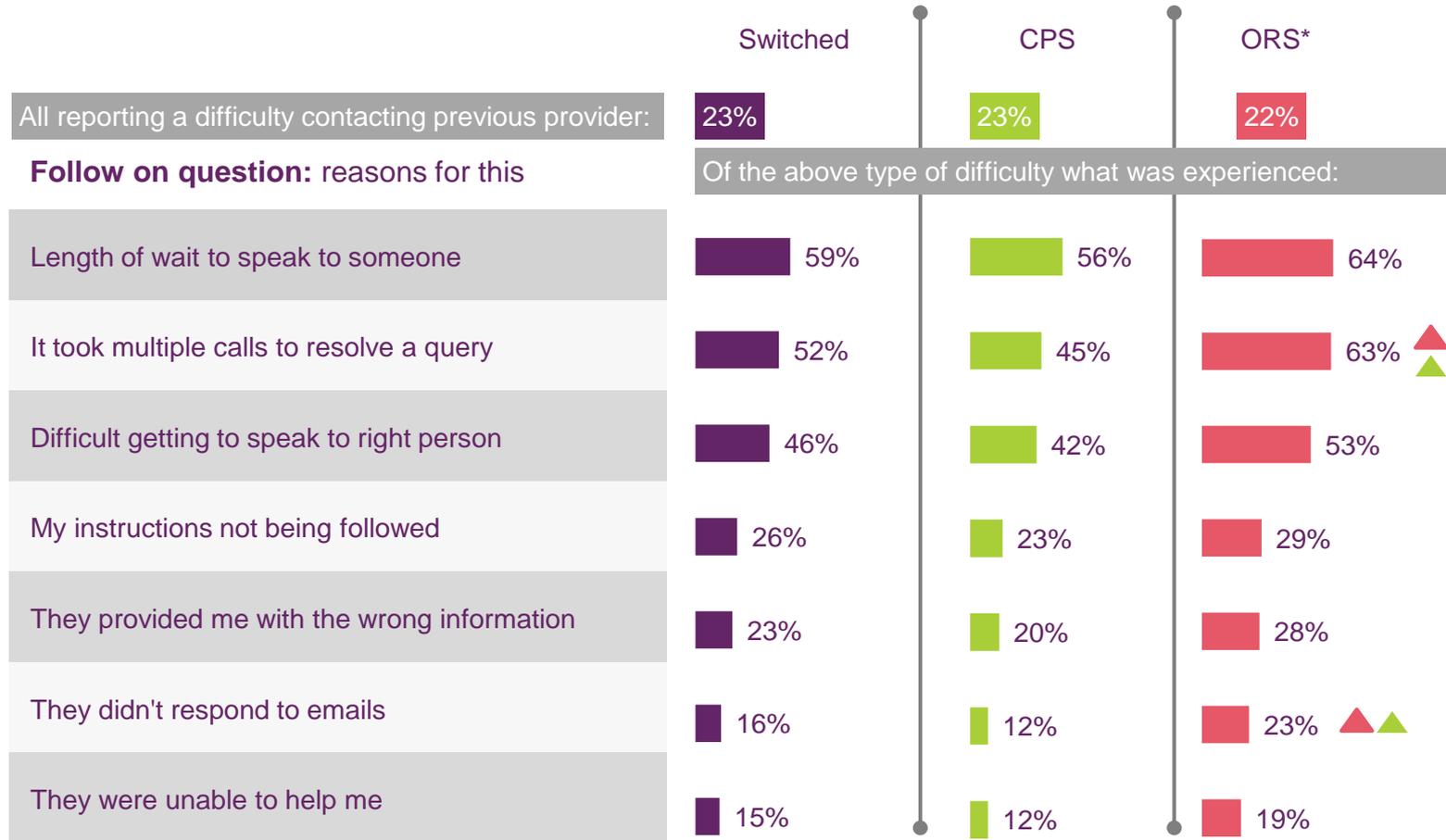
QC2A And which, if any, of these did you experience difficulty with...?

Base: All switched in last 24m (1132), CPS (681), ORS (451)

* Process difficulties are set out on previous slide

Reasons for citing difficulty contacting previous provider

Those reporting ANY difficulty (Major/Minor) contacting previous provider : specific difficulties experienced

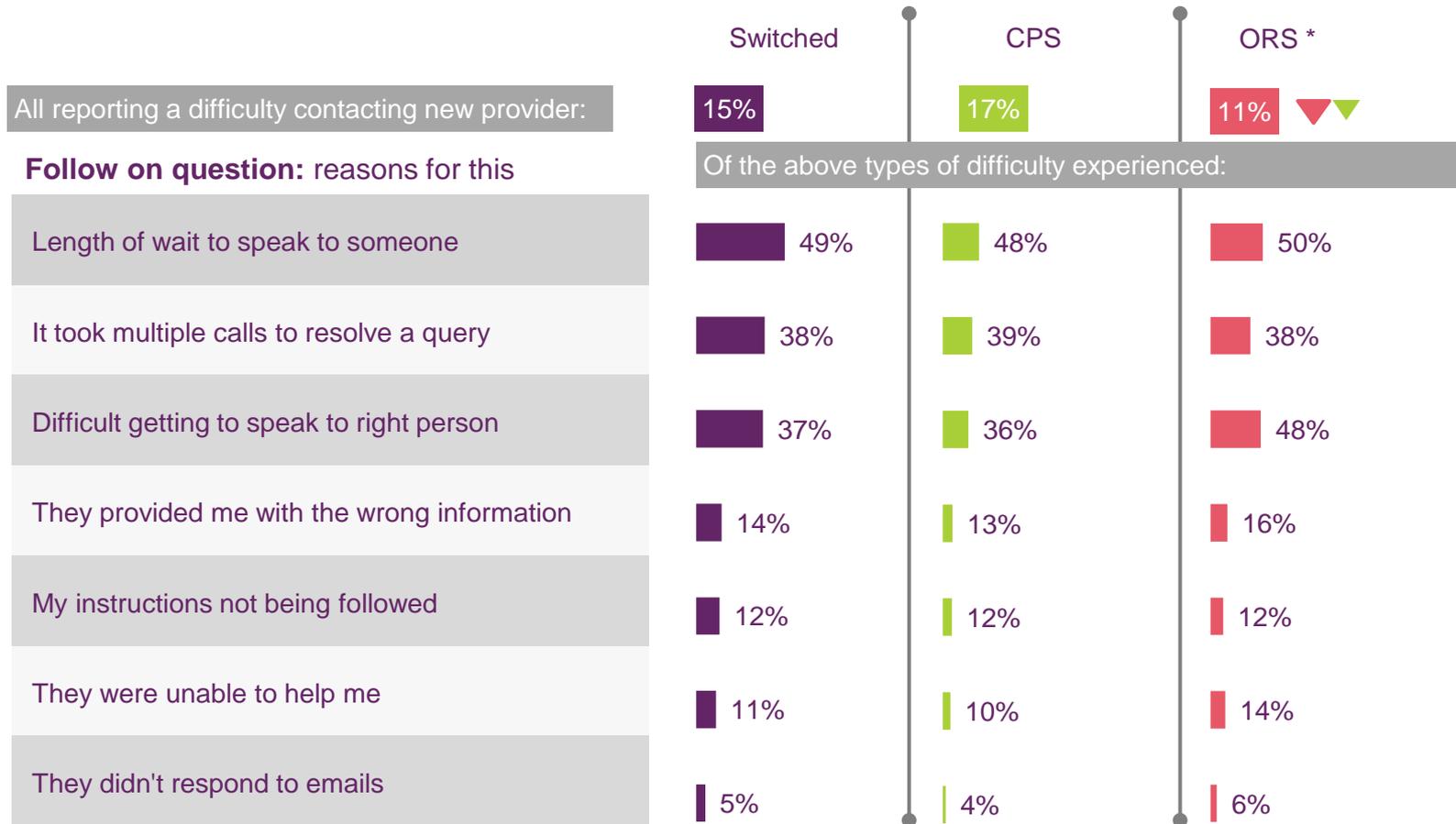


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 Colour to which group the difference applies to

QC2AB Which, if any of the following were reasons you felt the experience was difficult?
 Base: All switched in last 24m and experienced difficulty contacting previous provider (258), CPS (159), ORS (99*)

Reasons for citing difficulty **contacting** new provider

Those reporting ANY difficulty (Major/Minor) contacting new provider: specific difficulties experienced

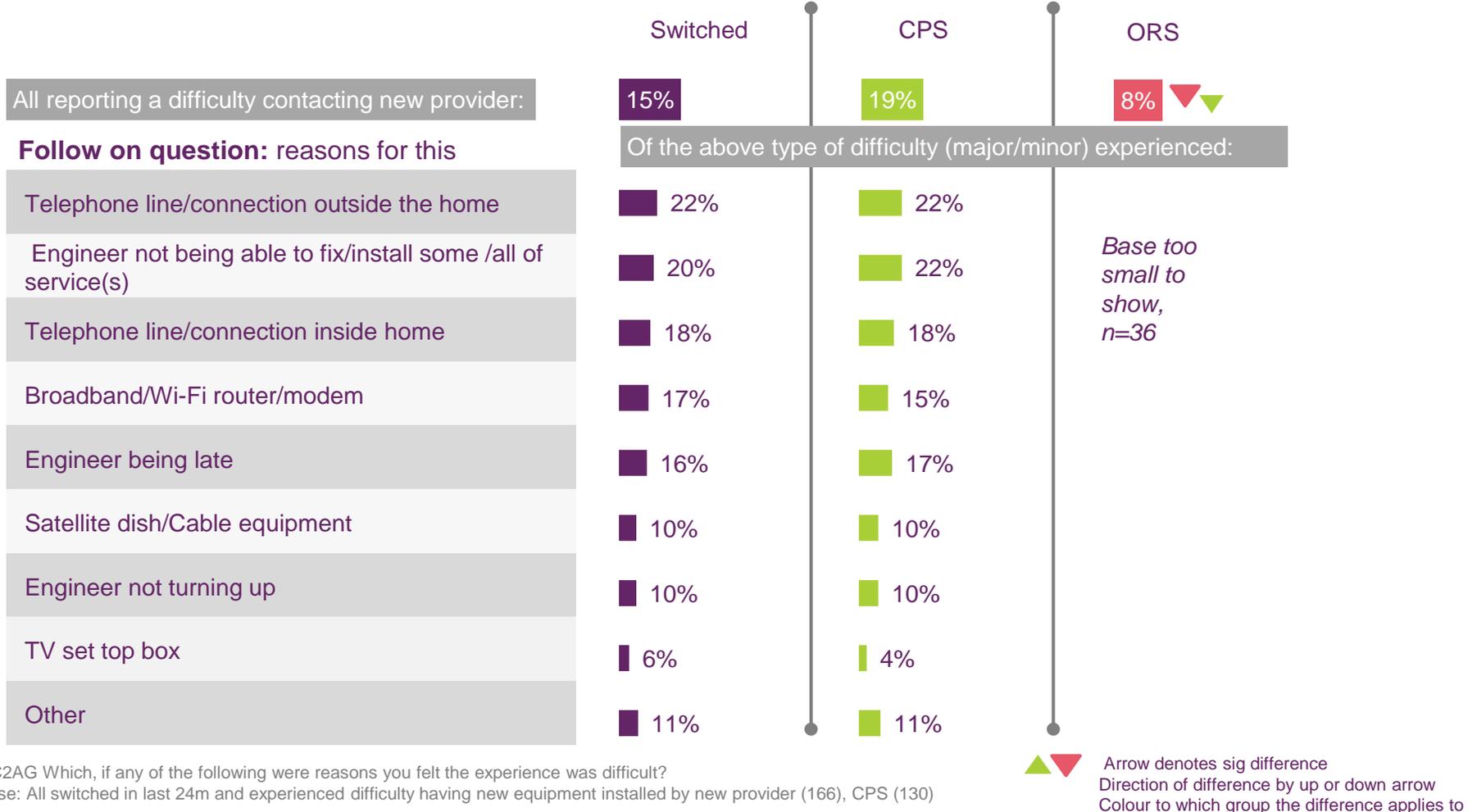


QC2AC Which, if any of the following were reasons you felt the experience was difficult?
 Base: All switched in last 24m and experienced difficulty contacting new provider (169), CPS (119), ORS (50*)
 * low base

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 Direction of difference by up or down arrow
 Colour to which group the difference applies to

Reasons for citing difficulty having equipment installed by provider

Those reporting ANY difficulty (Major/Minor) having new equipment installed by provider: specific difficulties experienced



QC2AG Which, if any of the following were reasons you felt the experience was difficult?

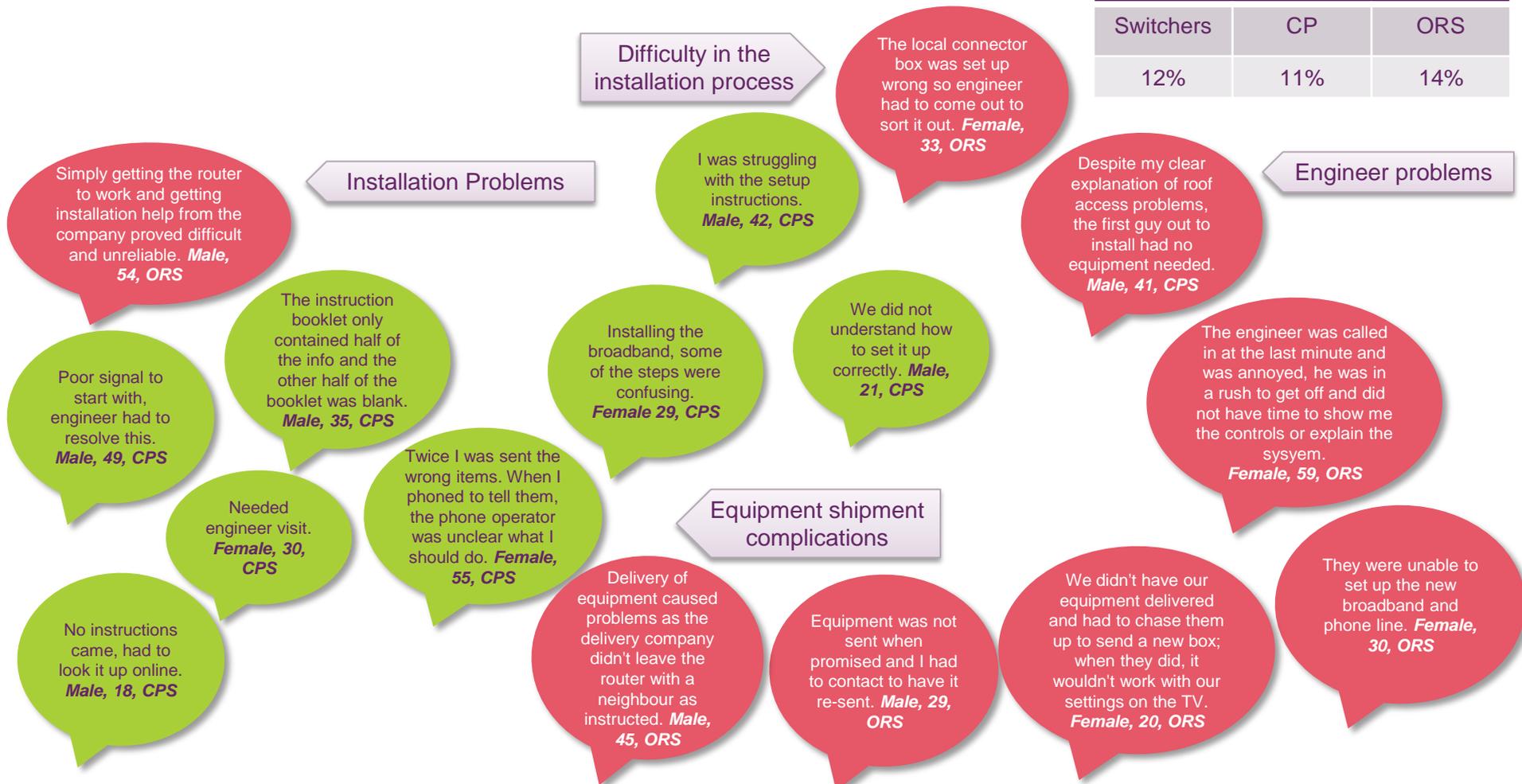
Base: All switched in last 24m and experienced difficulty having new equipment installed by new provider (166), CPS (130)

Reasons for difficulty setting up/receiving equipment yourself



Analysis among all those citing minor/major difficulty with this aspect

% citing difficulty		
Switchers	CP	ORS
12%	11%	14%



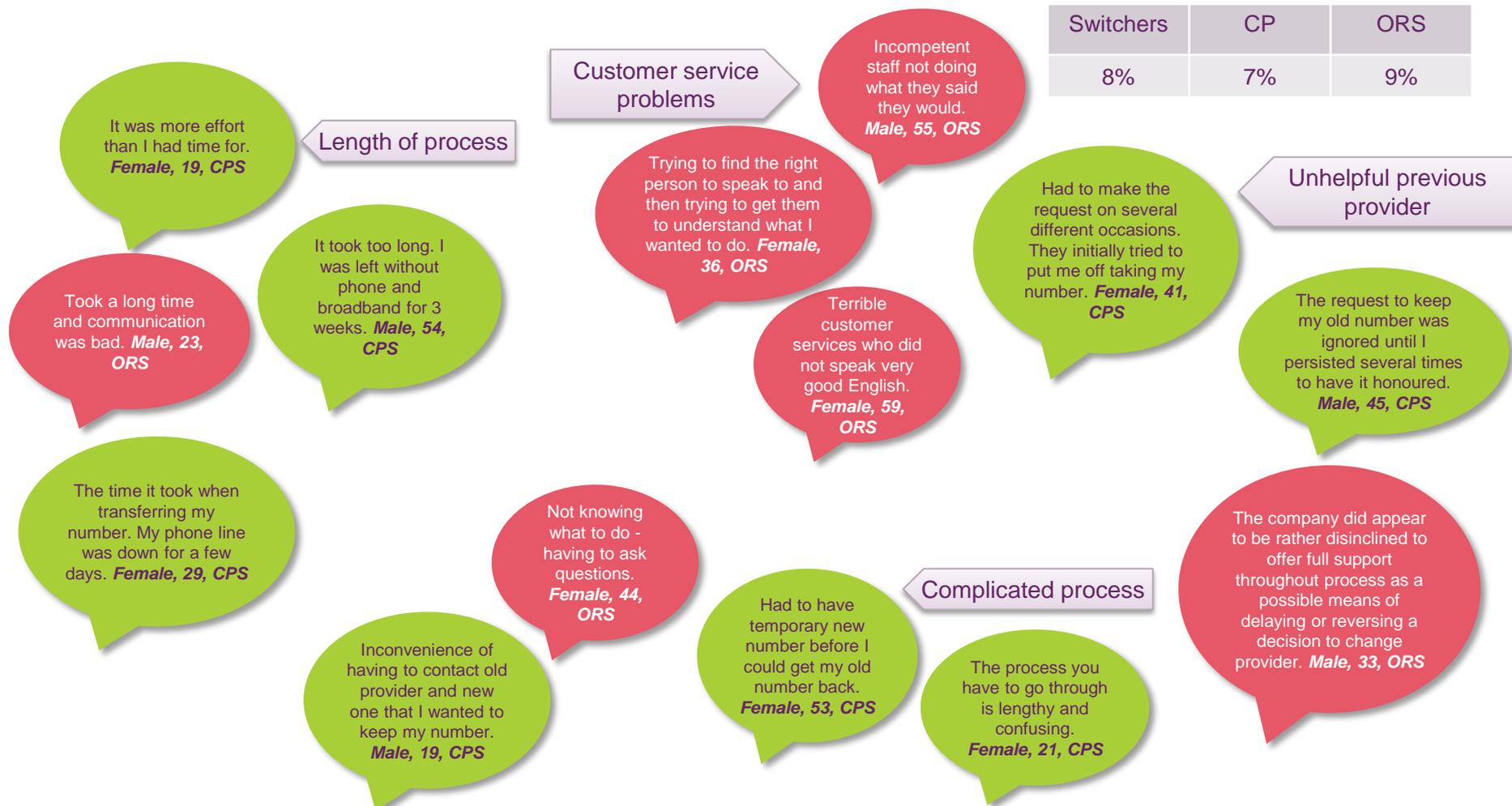
QC2AH You mentioned you experienced difficulty receiving or setting up equipment from your new provider yourself/or by a member of your household. What was it about the experience that was difficult? Major/ Minor. Unprompted.

Reasons for difficulty keeping/transferring phone number



Analysis among all those citing minor/major difficulty with this aspect

% citing difficulty		
Switchers	CP	ORS
8%	7%	9%



QC2AD You mentioned you experienced difficulty keeping/transferring your phone number. What was it about the experience that was difficult? Major/ Minor. Unprompted

Reasons for difficulty cancelling the service



Analysis among all those citing minor/major difficulty with this aspect

% citing difficulty		
Switchers	CP	ORS
35%	38%	30%

Customer service difficulties

Difficult to cancel online, or through email.
Female, 60, CPS

They kept sending me to different departments over the phone.
Female, 23, CPS

The provider were difficult to pin down to get them to cancel the service.
Male 35, CPS

The customer service was awful and it was nearly impossible to actually get hold of anyone.
Female, 29, CPS

Having to call a number of times and long waits when trying to call to cancel.
Female, 31, CPS

Trying to get them to collect the items supplied by previous provider and continual correspondence trying to get me back!
Female, 68, CPS

Unhelpful previous provider

I contacted them when I realised they were still charging me for a set-top box I had already returned to them, and they have STILL NOT refunded me.
Male, 39, CPS

Old provider attempts to retain the customer

They were trying to persuade me to stay but couldn't offer me a better price and just kept telling me how awful my new provider were. I had to repeat myself many times.
Female, 34, ORS

Kept ringing me to offer better prices than I was paying previously.
Female, 64, CPS

Very rude & pushy sales people.
Female, 40, ORS

They were very persistent on the phone with trying to keep me as a customer.
Female, 28, CPS

It was a while before they let us cancel and they made us stay with them until the end of the month.
Male, 21, CPS

Dispute on the amount owed to previous supplier.
Female, 55, CPS

Hidden/Exit charges

The provider tried to impose exit penalties even though the contract period had ended.
Male, 50, ORS

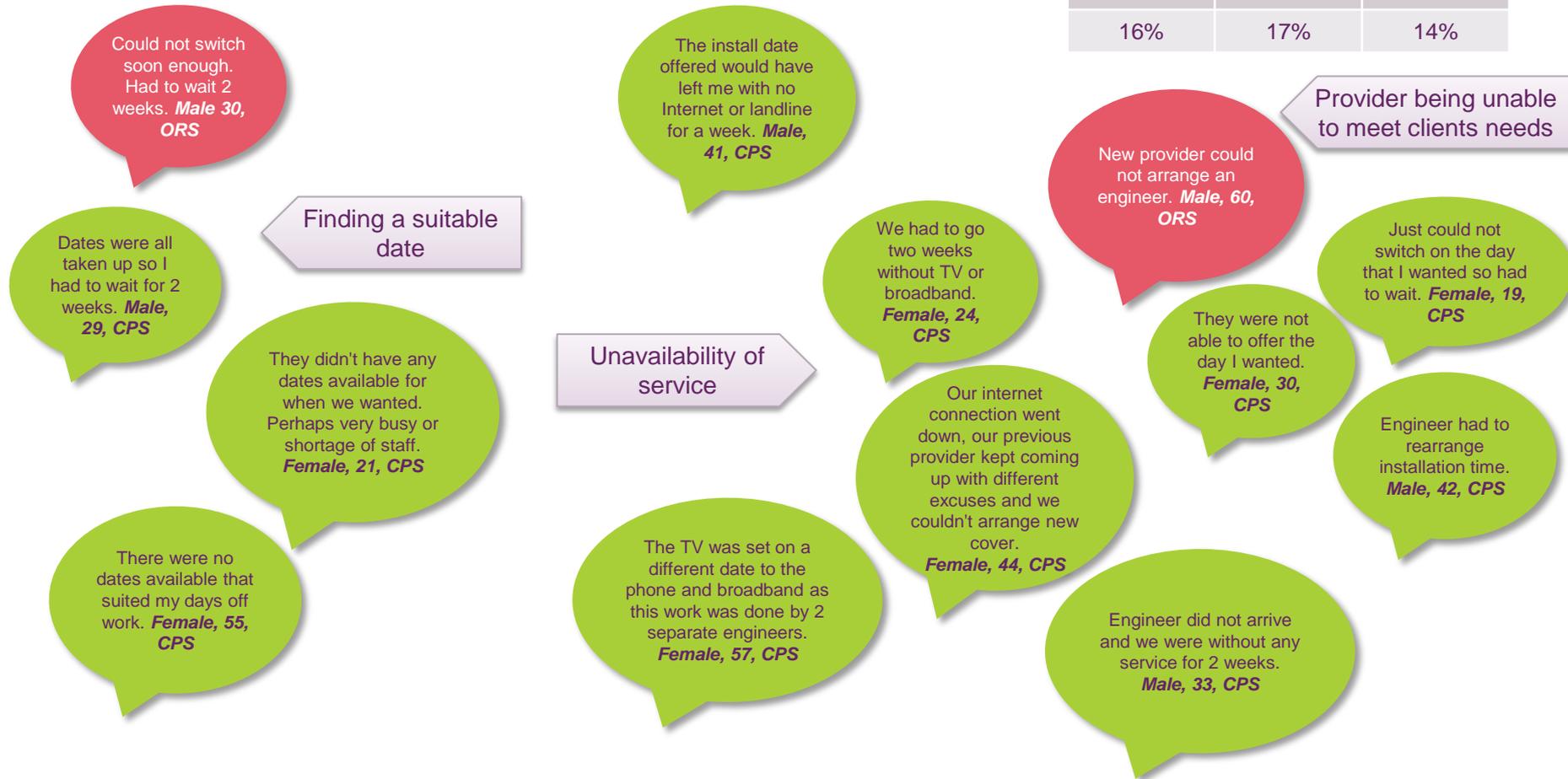
The provider was incompetent at cancelling our previous contract, they continued to charge us for an additional month until we contacted them again.
Male, 40, CPS

QC2AE You mentioned you experienced difficulty cancelling your previous service. What was it about the experience that was difficult? Major/Minor. Unprompted

Reasons for difficulty getting the switch to happen on dates you wanted

Analysis among all those citing minor/major difficulty with this aspect

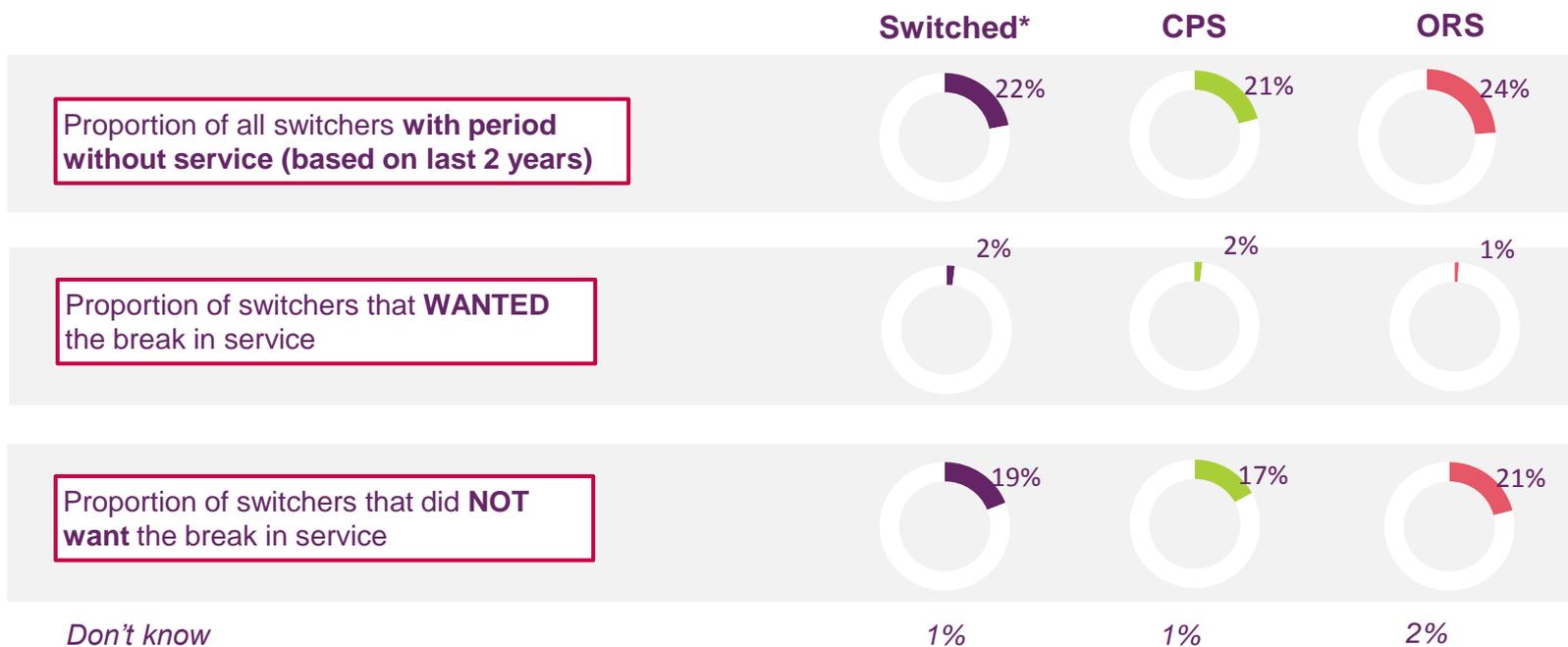
% citing difficulty		
Switchers	CP	ORS
16%	17%	14%



QC2AF You mentioned you experienced difficulty getting the switch to happen on the date you wanted. What was it about the experience that was difficult? Major/ Minor. Unprompted

LOSS OF SERVICE

Experience of loss of service when switching, and whether this was wanted



QG8 When you switched, did you experience any period of time without any of your services? QG11 Did you want the break in service?

Base: All switched in last 24m (1132), All CPS (681), ORS (451)/ All switchers in last 24m who had period without service: All switched (252), All switched via CP (144), (125), ORS (108). C. 1-2% in each sample group did not know whether the loss of service was wanted or unwanted and c. 5%-6% did not recall whether there was a loss of service. .

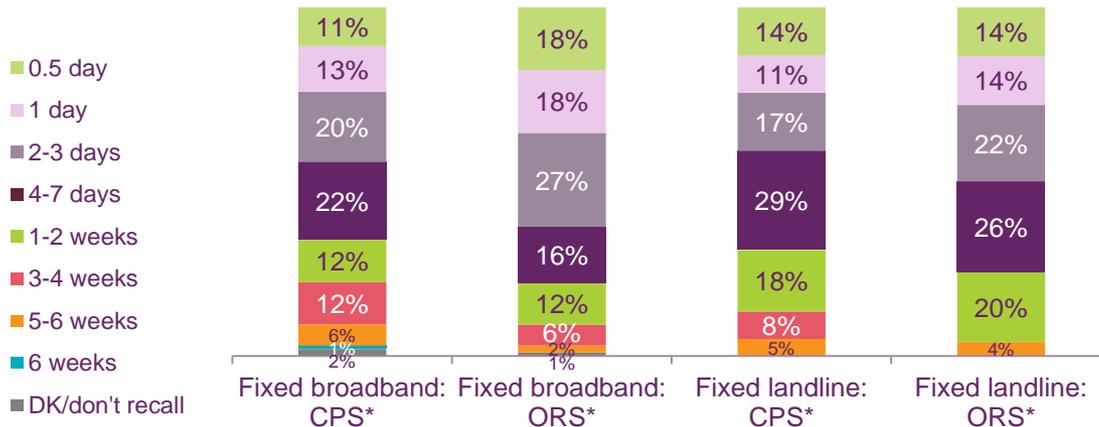
* Bespoke analysis: 21% of those switching to Openreach experienced an unwanted loss of service which compares to 15% among those switching to Virgin.

Unwanted loss of service by type of switch



Unwanted loss of service Last 2 years	CPS				ORS			
	Any	Fixed broadband*	Fixed landline*	Pay TV	Any	Fixed broadband*	Fixed landline*	Pay TV
% experiencing unwanted loss	17%	12%	10%	6%	21%	19%	11%	4%
Mean loss (length)**	n/a	9 days	8 days	Base too low to show Pay TV	n/a	5 days	6 days	Base too low to show Pay TV

Unwanted Loss of service
Last 2 years - ANY Loss**



Note: The fixed broadband sample in this study includes dual (FL & BB) and triple play (FL, BB and pay TV) customers only. These account for around two thirds of fixed broadband customers

Note: Base too low to show pay TV

QG8 When you switched, did you experience any period of time without any of your services? QG9 Which services did you lose for a period of time? / G10 How long were you without service? / QG11 Did you want the break in service?

Base: All switched in last 24m: CPS (681), ORS (451) / Base: All switchers in last 24m who had period without service up to 6 weeks and did not want this: Fixed broadband – CPS (82*), Fixed broadband – ORS (83*), Fixed landline – CPS (66*), Fixed landline – ORS (50*) *Low base size treat as indicative only

** ANY Loss = up to 6 weeks. 3 outliers have been excluded from the data, these respondents reported a loss in excess of 6 weeks (FLL – one 8 weeks; FBB – one 8 weeks, one 2 months). This has no impact on the total proportion experiencing unwanted loss of service. n/a = not available

Unwanted loss of service: reasons



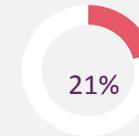
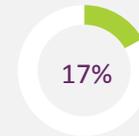
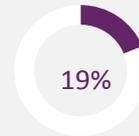
Last 2 yrs

All switchers with period without service (who did not want this)

Switched

CPS

ORS*



	Switched	CPS	ORS*
Delay in service activation	25%	22%	28%
The new provider gave me a starting date that was after the end of my previous contract	17%	17%	17%
There was a fault with the line	16%	18%	15%
Delay in broadband installation	14%	12%	16%
Problems/a fault with the equipment (e.g. satellite dish, cable box, broadband router)	9%	12%	5%
To switch on a particular date, that I wanted	8%	8%	7%
Delay in landline installation	9%	13%	5%
Delay in delivery of the equipment	8%	8%	7%
Previous service not cancelled correctly	7%	6%	8%
Delay in cable installation	6%	8%	3%
I cancelled my previous service before arranging my new one	2%	3%	1%
The wrong equipment was provided /needed something extra	2%	3%	1%
Delay in satellite dish installation	1%	2%	1%
Don't know/can't recall	9%	7%	13%

QG8 When you switched, did you experience any period of time without any of your services? QG12 Why did you have a period without service?

Base: All switchers in last 24m who had period without service and did not want this: (213), CPS (118), ORS (95*) *Low base size treat as indicative only

Unwanted loss of service: summary of reasons

	Switchers	CPS	ORS
Delay in service activation/installation	42%	42%	42%
Delay in service activation	25%	22%	28%
Delay in broadband/landline/cable/satellite installation	23%	26%	20%
Difficulties co-ordinating	31%	32%	29%
The new provider gave me a start date that was after the end of my previous contract	17%	17%	17%
I cancelled my previous service before arranging my new one	2%	3%	1%
To switch on a particular date, that I wanted	8%	8%	7%
Previous service was not cancelled correctly	7%	6%	8%
Issues with equipment	17%	20%	14%
Problems/fault with the equipment (e.g. satellite dish, cable box, router)	9%	12%	5%
Delay in delivery of the equipment	8%	8%	7%
The wrong equipment was provided /needed something extra	2%	3%	1%

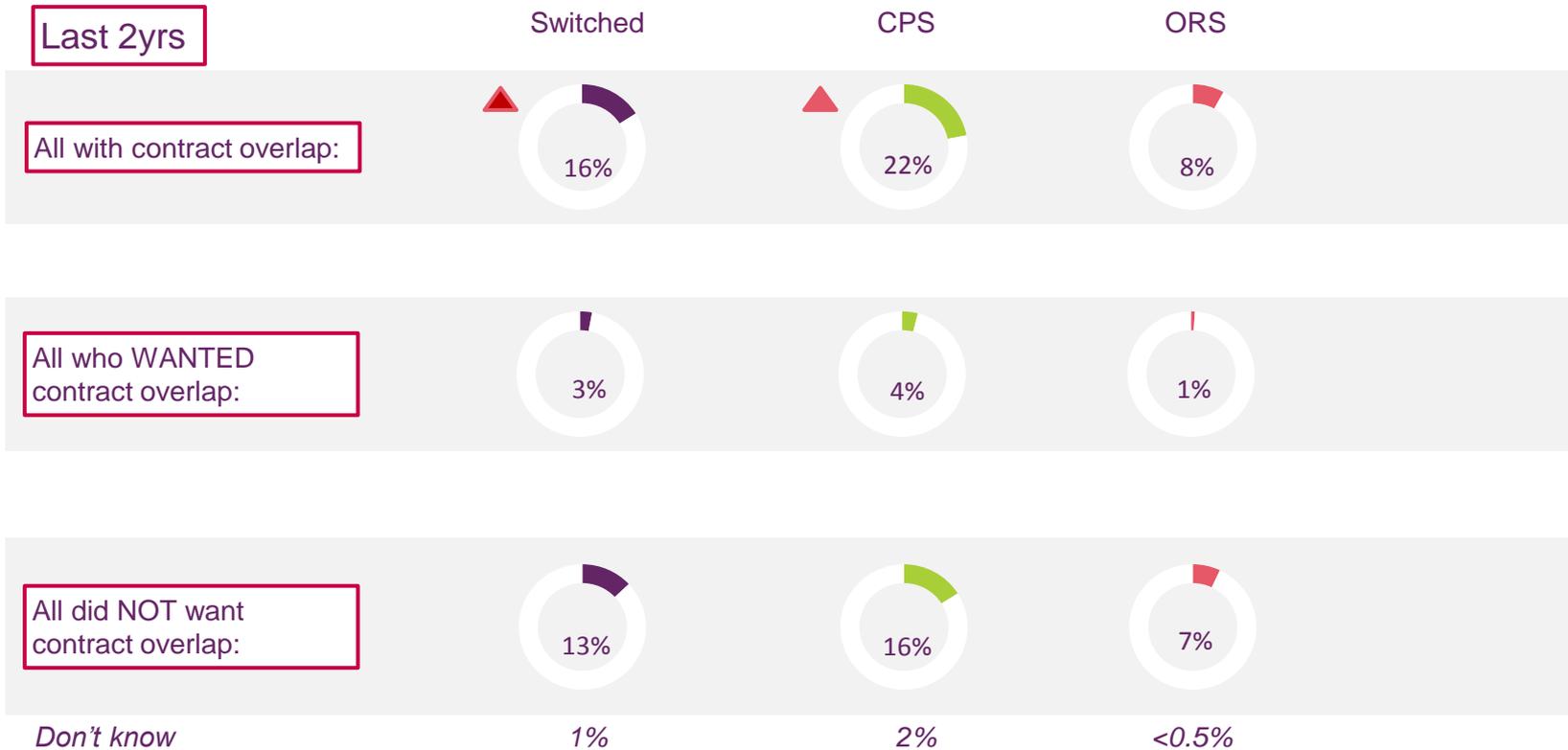
QG8 When you switched, did you experience any period of time without any of your services? QG12 Why did you have a period without service?

Base: All switched in last 24m and experienced an unwanted period without service (213), CPS with unwanted period without service (118), ORS with unwanted period without service (95*)

*Low base size treat as indicative only

DOUBLE BILLING/CONTRACT OVERLAP

Experience of double billing/contract overlap when switching, and whether this was wanted



NB: The following charts are based on those who did NOT want a contract overlap

QG3 Did the contracts for your old and new service(s) overlap at all? QG6 Did you want the contracts to overlap?

Base: All switched in last 24m (1132), CPS (681), ORS (451)

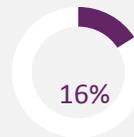
Note: Figures include overlap of 1 day, excluding these only reduces the proportion of CPS with contract overlap to 21%

Double billing/contract overlap reasons (1 of 2)

Last 2yrs

All with contract overlap

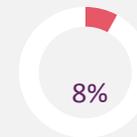
Switched



CPS



ORS



Reason	Switched	CPS
I had already signed up with my new provider, and wasn't aware of the notice period with my previous provider	16%	14%
To ensure I always had a BROADBAND service(s) during the switch	16%	18%
To switch to a better service immediately	15%	14%
Due to the available engineer appointment dates	14%	15%
The new provider gave me a date that was before the end of my previous contract	13%	15%
Previous service not cancelled correctly	12%	12%
The previous service wasn't cancelled on the date requested	11%	11%
To sign up with my new provider before a deal ran out	9%	11%
To ensure I always had a PHONE service(s) during the switch	11%	11%

Base too small for ORS

QG3 Did the contracts for your old and new service(s) overlap at all? QG7 Why did the contracts overlap?

Base: All switched in last 24m (1132), CPS (681), ORS (451)/All who had contracts which overlapped : Switched (185), CPS (149)

Note: Figures include overlap of 1 day, excluding these only reduces the proportion of CPS with contract overlap to 21%

Double billing/contract overlap reasons (2 of 2)

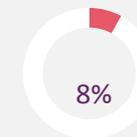
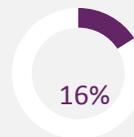
Last 2yrs

Switched

CPS

ORS

All with contract overlap



To ensure I always had a pay TV service(s) during the switch	9%	10%
To switch on a particular date, that I wanted	8%	6%
To ensure I kept my landline number	6%	7%
To get faster broadband speed as soon as possible	5%	6%
To get inclusive calls as soon as possible	1%	1%
Other	8%	7%

Base too small for ORS

QG3 Did the contracts for your old and new service(s) overlap at all? QG7 Why did the contracts overlap?

Base: All switched in last 24m (1132), CPS (681), ORS (451)/All who had contracts which overlapped : Switched (185), CPS (149)

Note: Figures include overlap of 1 day, excluding these only reduces the proportion of CPS with contract overlap to 21%

Double billing/contract overlap: summary of reasons

Last 2yrs

All with contract overlap

	Switched	CPS
Difficulties co-ordinating	61%	58%
Already signed up with new provider and wasn't aware of notice period	16%	14%
Engineer availability	14%	15%
Previous service wasn't cancelled on date requested	11%	11%
New provider gave me date that was before end of previous contract	13%	15%
Previous service not cancelled correctly	12%	12%
To switch on particular date that I wanted	8%	6%
To ensure continuity of service	26%	28%
To ensure I always had a broadband service during the switch	16%	18%
To ensure I always had a phone service during the switch	11%	11%
To ensure I kept my landline number	6%	7%
To ensure I always had a Pay TV service during the switch	9%	10%
To get a better service /deal immediately	27%	29%
To switch to a better service immediately	15%	14%
To sign up with my new provider before a deal ran out	9%	11%
To get faster broadband as soon as possible	5%	6%
To get the channels I wanted as soon as possible	2%	2%
To get inclusive calls as soon as possible	1%	1%
To get a channel in time to view a specific event	1%	1%

QG7 Why did the contracts overlap?

Base: All who had contracts which overlapped: Switched (185), CPS (149), base too low to show for ORS (36)

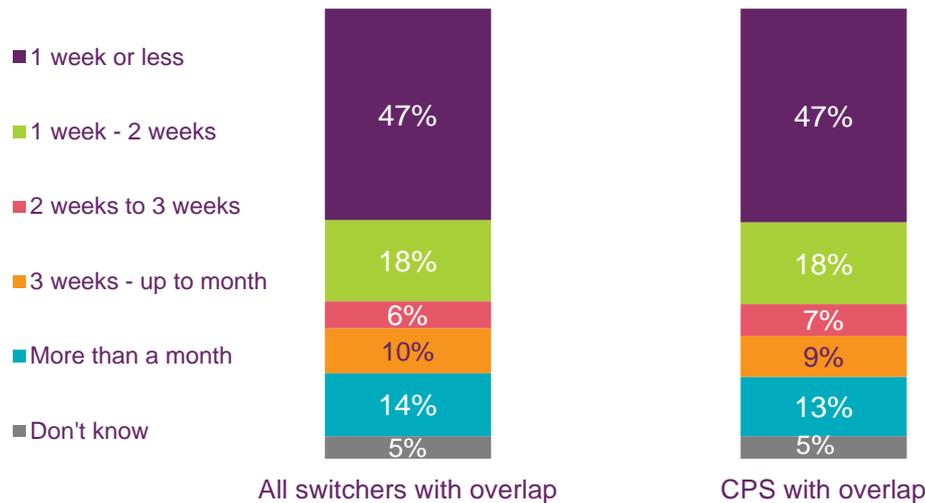
Length of double billing/contract overlap

Length of contract overlap

Last 2 years - ANY

Mean: 14 days

14 days



QG5 How long did the contracts overlap for? In other words how long were you paying for both services at the same time?
 Base: All switched and reported overlap (185), All CPS switched and reported overlap (149), Base too low to show for ORS (36)

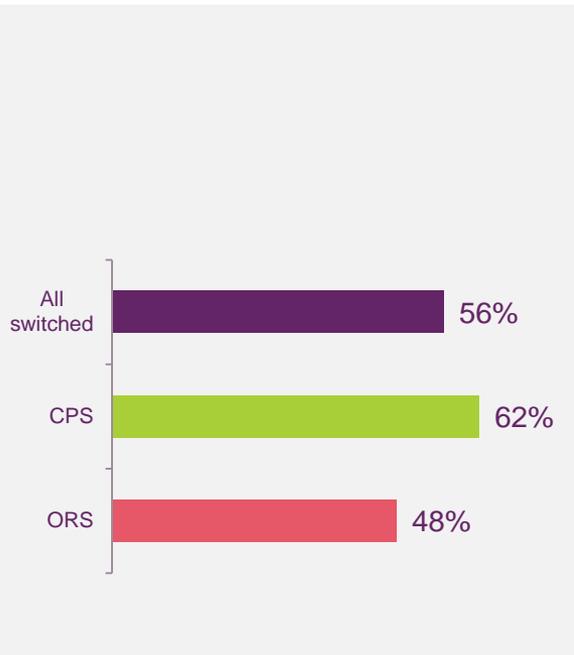
GIVING NOTICE AND CHARGES

Types of notice period/when gave notice

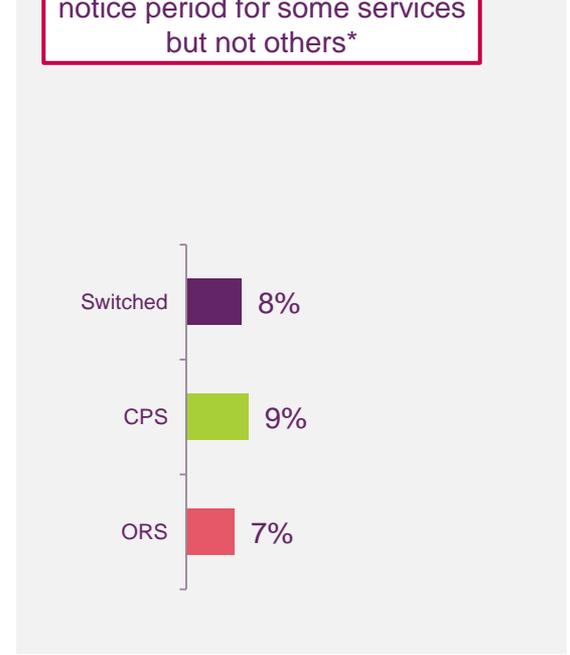
% of sample with 1 notice period for all services*



When gave notice
(those with 1 notice period)



All who had a different notice period for different services or a notice period for some services but not others*



QG1 Before you left your previous (INSERT SERVICES SWITCHED AT QB3) service(s) provider, you may have been required to give them notice. If so, which of the following applied/QG2 Before you left your previous (INSERT SERVICES SWITCHED AT QB3) service(s) provider, you may have been required to give them notice. / QG2.If you did so, at what point did you give notice to your provider that you wanted to leave?

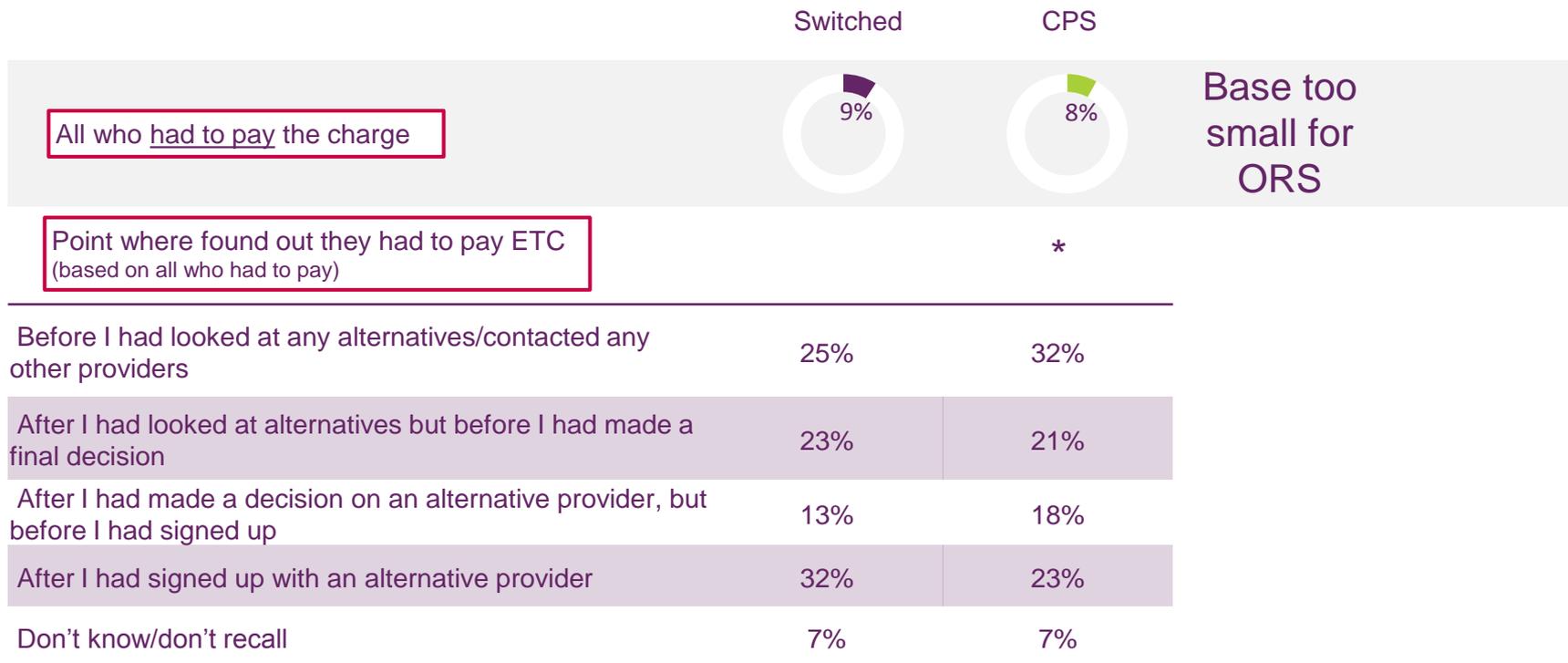
Base: All switched in last 24m (1132), CPS (681), ORS (451), 1 notice period for all services: total (637), CPS (419), ORS (218)

* 35% of switchers could not recall/did not know whether they had a single notice period, different notice periods or no notice period for their services, 29% for CPS and 45% for ORS.

Overall summary on charges

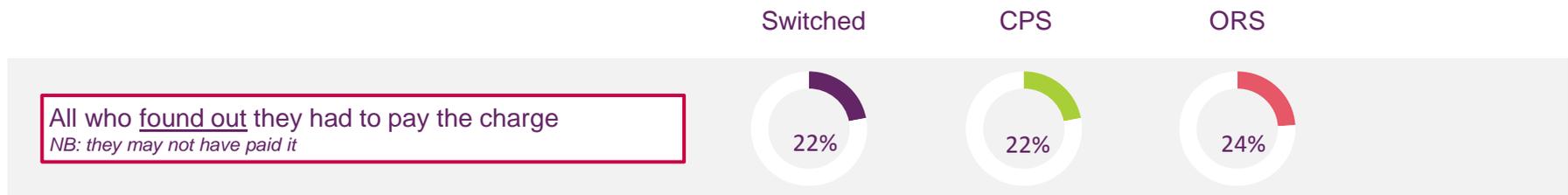
	All paying an early termination charge (ETC)	All finding they had to pay disconnection charge	All finding they had to pay charge for equipment	All paying disconnection charge	All paying charge for equipment
All switched	9%	22%	14%	10%	3%
CPS	8%	22%	16%	9%	3%
ORS	11%	24%	11%	10%	2%

Point at which found out they had to pay an ETC



QC1AB Did you have to pay a charge before the end of your minimum contract period? QC1AG Which of the following best describes when you found out you had to pay the charge?
 Base: All switched in last 24m who paid ETC: total (105), CPS (57*), * LOW BASE TREAT AS INDICATIVE ONLY

Point at which found out they had to pay a disconnection charge



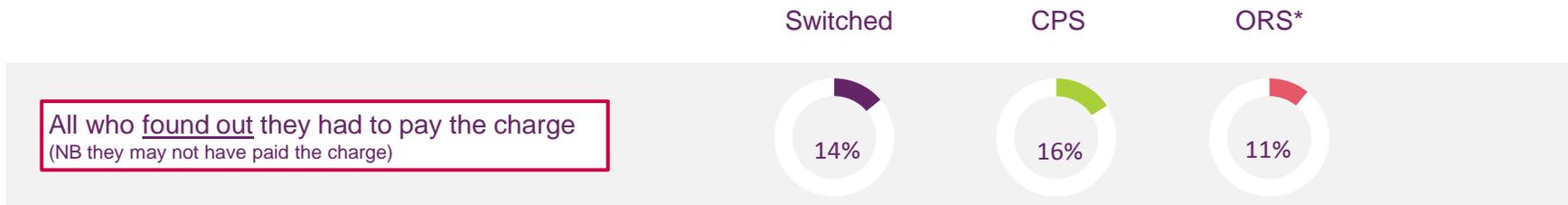
Point where found out they had to pay disconnection charge (based on all found out they had to pay it)

	Switched	CPS	ORS
Before I had looked at any alternatives/contacted any other providers	19%	22%	14%
After I had looked at alternatives but before I had made a final decision	19%	16%	22%
After I had made a decision on an alternative provider, but before I had signed up	17%	20%	12%
After I had signed up with an alternative provider	32%	29%	37%
Don't know/don't recall	14%	13%	15%

QC1A When you last changed your provider, did you find out that you had to pay disconnection charges? QC1AG Which of the following best describes when you found out you had to pay the charge?

Base: All switched in last 24m (1132), CPS (681), ORS (451), All switchers who found out they had to pay the charge: total (254), CPS (148), ORS (106)

Point at which found out they had to pay a charge for not returning equipment



Point where found out they had to pay charge for not returning equipment (based on all found they had to pay)

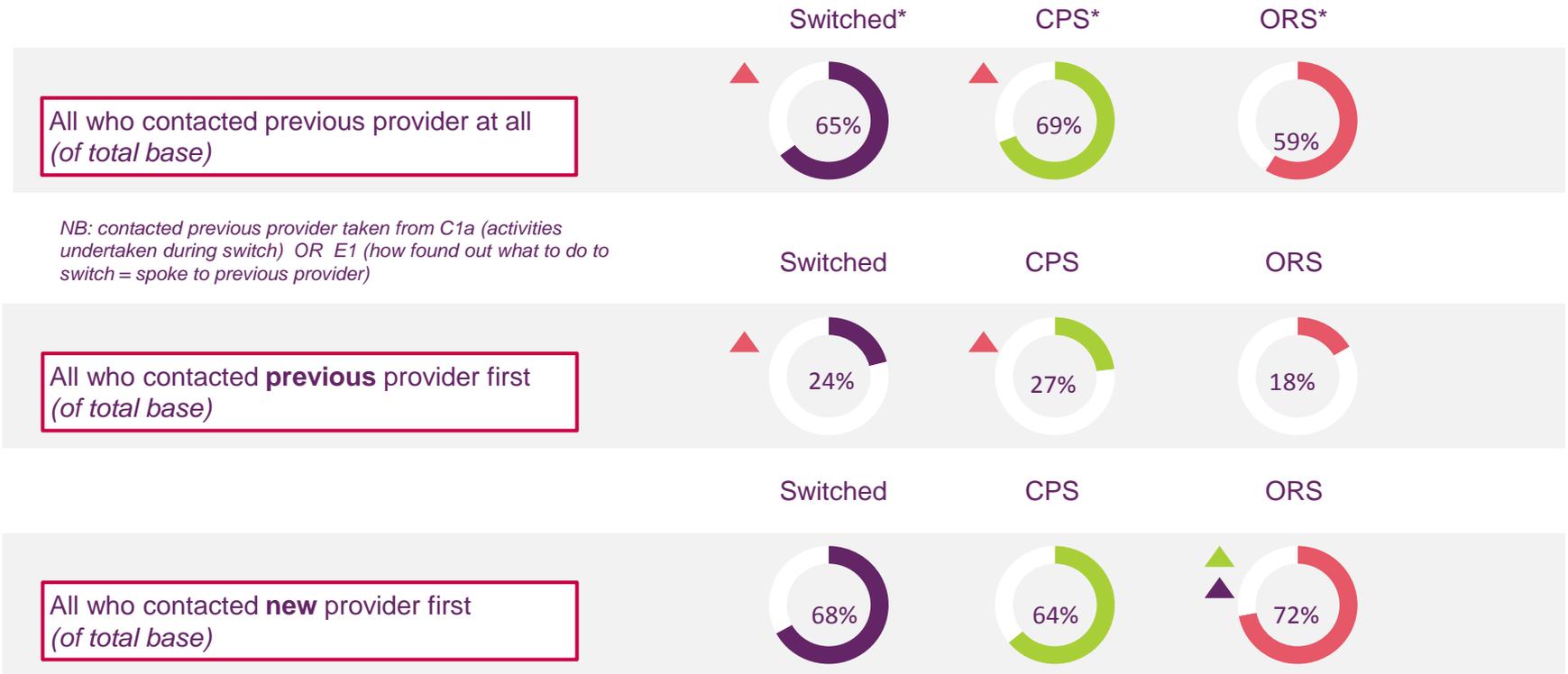
	Switched	CPS	ORS*
Before I had looked at any alternatives/contacted any other providers	17%	16%	20%
After I had looked at alternatives but before I had made a final decision	19%	19%	20%
After I had made a decision on an alternative provider, but before I had signed up	15%	19%	6%
After I had signed up with an alternative provider	30%	26%	39%
Don't know/don't recall	18%	19%	16%

QC1A When you last changed your provider, did you find out that you had to pay a charge for not returning equipment? QC1AG Which of the following best describes when you found out you had to pay the charge?

Base: All switched in last 24m (1132), CPS (681), ORS (451), All switchers who found out they had to pay the charge: total (159), CPS (108), ORS (51*) *low base size treat as indicative only

CONTACT WITH PROVIDER

Overview: Point of contact on deciding to switch

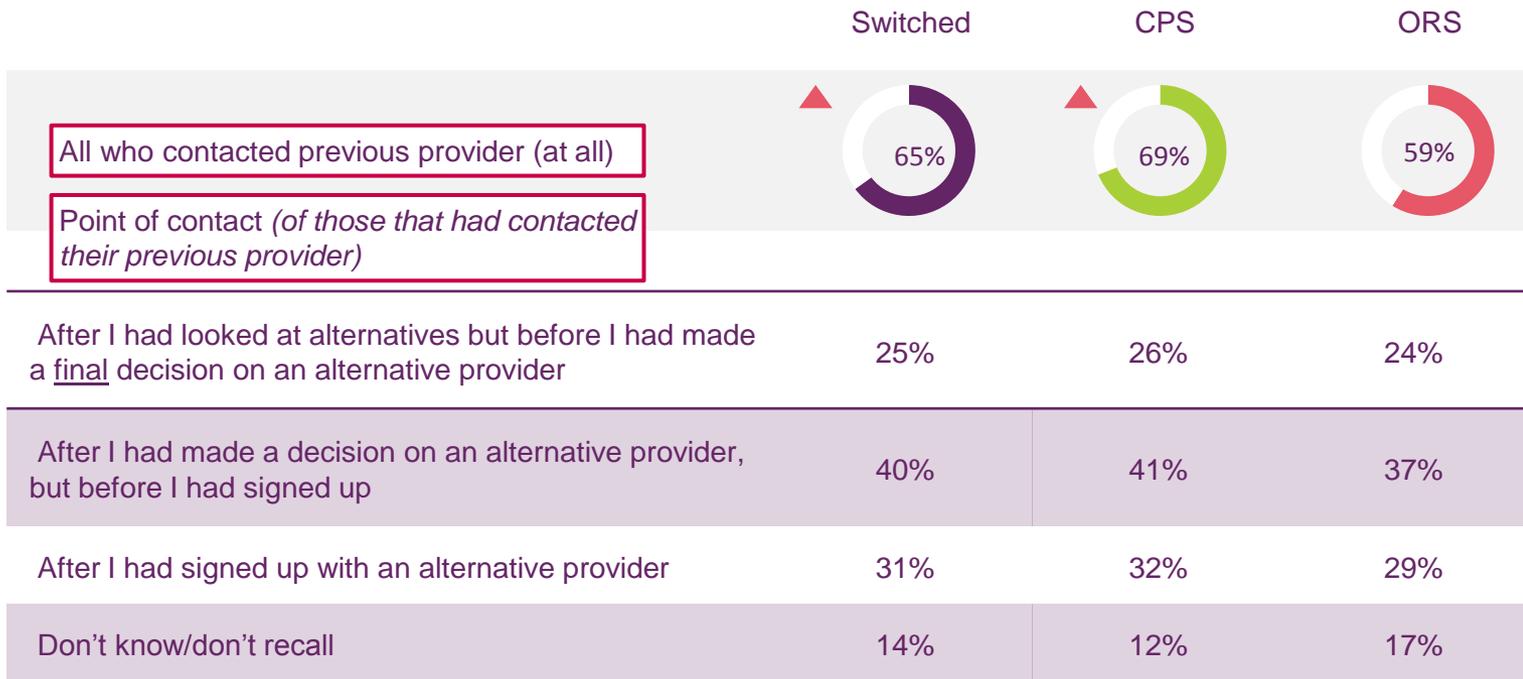


QF1 Once you decided to switch your services, who did you contact first? QF3 And at what point did you contact your previous service provider?

Base: All switched in last 24m (1132), CPS (681), ORS (451); All who contacted previous provider: Switched (732), CPS (467), ORS (265)

* The proportion who recall contacting their previous provider at all rises to 71%, 77% and 62% respectively, when including those who recalled doing so at QE3 and QF1.

Point of contact: previous provider

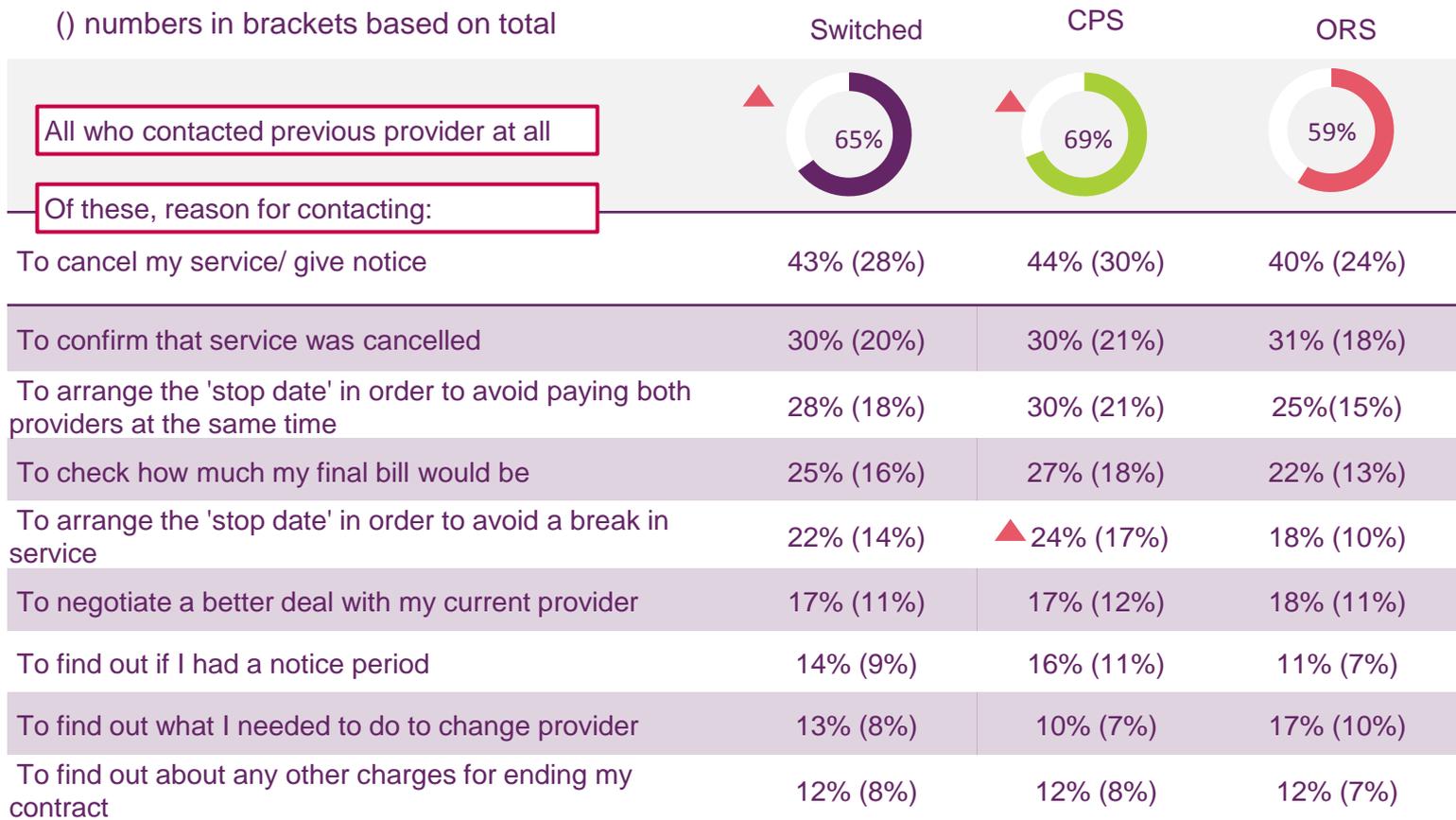


QF3 And at what point did you contact your previous service provider?

Base: All switched in last 24m (1132), CPS (681), ORS (451)/All who contacted previous provider: Switched (732), CPS (467), ORS (265)

Reasons for contacting previous provider (1 of 2)

() numbers in brackets based on total

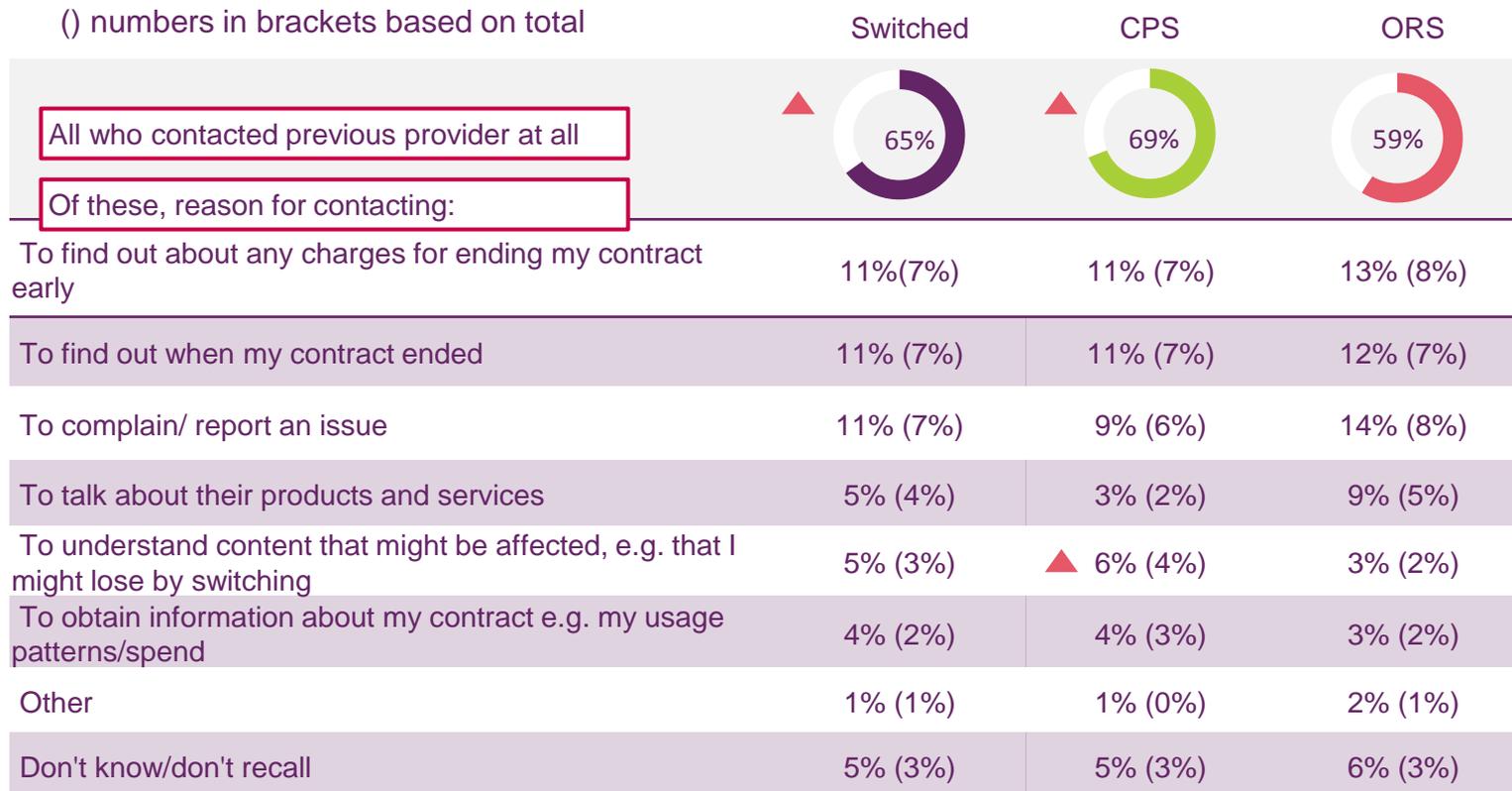


QF5 And which if any of these were reasons you contacted your previous provider?

Base: All switched in last 24m (1132), All switched CPS (681), ORS (451)/ All who contacted previous provider: Switched (732), Switched CPS (467), Switched ORS (265)

Reasons for contacting previous provider (2 of 2)

() numbers in brackets based on total



QF5 And which if any of these were reasons you contacted your previous provider?

Base: All switched in last 24m (1132), All switched CPS (681), ORS (451)/ All who contacted previous provider: Switched (732), Switched CPS (467), Switched ORS (265)

Reasons for contacting previous provider: summary

All who contacted previous provider at all

Of these, reason for contacting:

	Switched	CPS	ORS
To find a better deal/search	22%	20%	26%
To negotiate a better deal with my current provider			
To talk about their products/services			
To find information about the implications of switching	27%	26%	30%
To find out about other charges for ending my contract			
To find out about charges for ending my contract early			
To find out when my contract ended			
Questions relating to the process	66%	66%	66%
To confirm that the service was cancelled			
To find out what I needed to do to change provider			
To find out if I had a notice period			
To cancel my service/give notice			
To arrange a stop date in order to avoid paying both providers at the same time			
To arrange the stop date to avoid paying both providers at the same time			

QF5 And which if any of these were reasons you contacted your previous provider?

Base: All who contacted previous provider: Switched (732), Switched CPS (467), Switched ORS (265)

Reasons for contacting previous provider first



QF2 What was your main reason for contacting your previous provider first, instead of your new provider? Unprompted.

Prompted descriptions about conversations with previous provider

() numbers in brackets based on all in each sub-group

Proportion that recalled ANY contact with previous provider when switching (includes those contacted by their provider) *(of total)*:

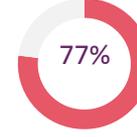
Switched



CPS



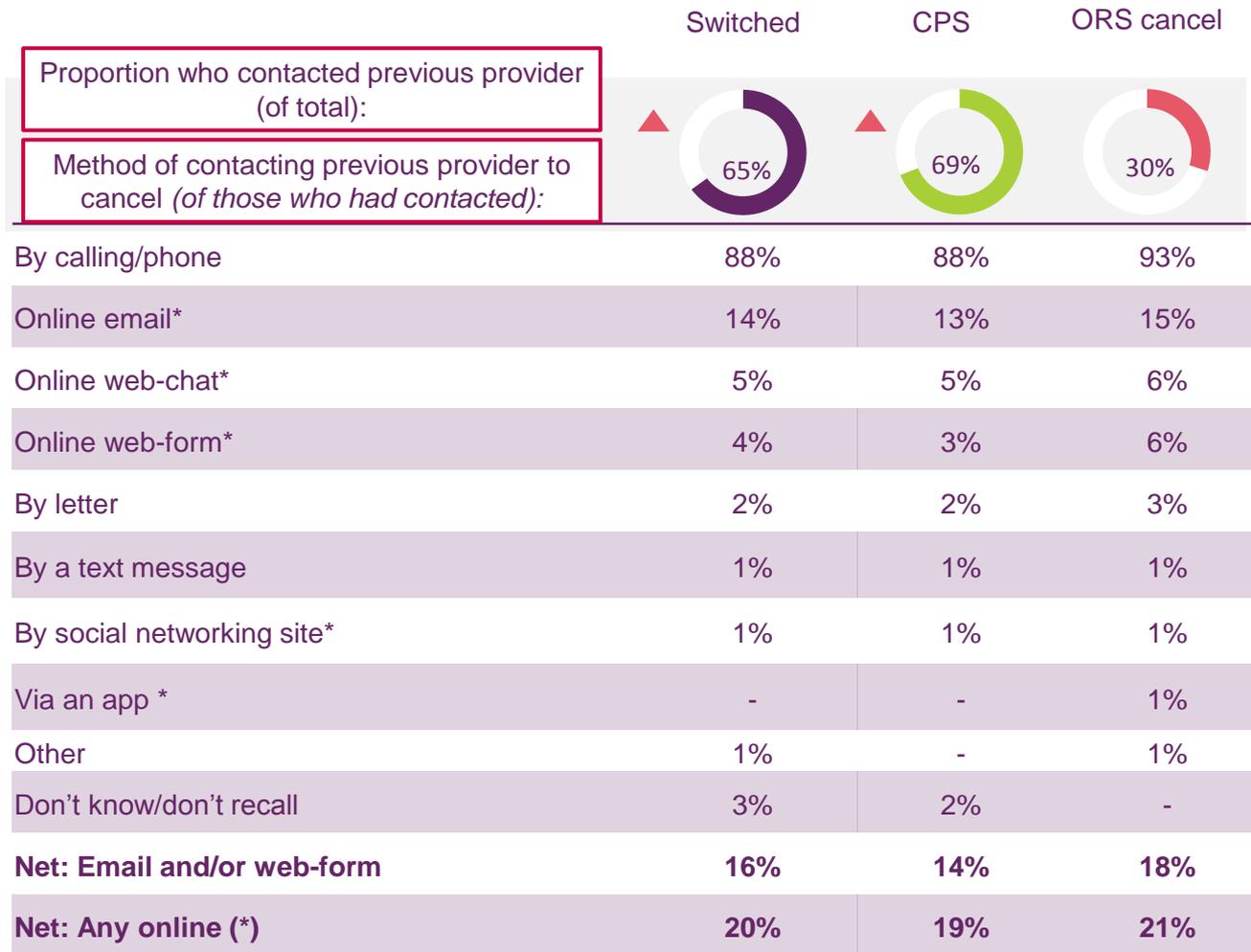
ORS



Words used to describe contact (of those that recalled contact). Ordered by number of mentions.	Switched	CPS	ORS
Frustrating	44% (35%)	45% (37%)	41% (32%)
Time-Consuming	43% (34%)	45% (36%)	41% (31%)
Unhelpful	36% (29%)	36% (29%)	36% (28%)
Helpful	22% (17%)	20% (17%)	23% (18%)
Unnecessary	20% (16%)	19% (16%)	20% (15%)
Informative	18% (14%)	17% (14%)	20% (16%)
Essential	12% (9%)	12% (10%)	12% (9%)
Reassuring	7% (6%)	8% (6%)	7% (5%)
Don't know/don't recall	7% (6%)	6% (5%)	8% (6%)

QF14. And still thinking about all the conversations you had with your previous provider when switching, which of the following words would you use to describe this contact?
 Base: All switchers that had contact with previous provider when switching, (902), CPS (555), ORS (347)

Methods used to contact previous provider to cancel



QF6 Which of these methods did you use to contact your provider to tell them you wanted to leave/cancel your service?

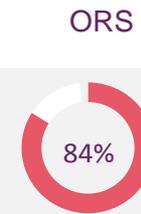
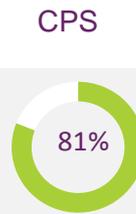
Base: All switchers who contacted previous provider and: total (732), CPS (467), ORS & cancelled (143)

* Online includes online email, online web-chat, online web-form, via an app, social networking site.

ATTITUDES TO SWITCHING

Experience of switching overall

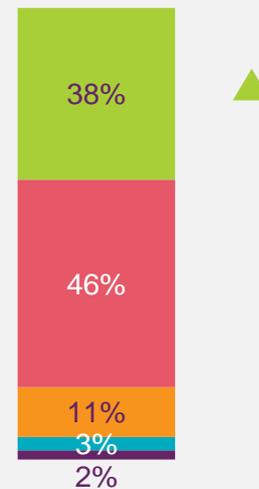
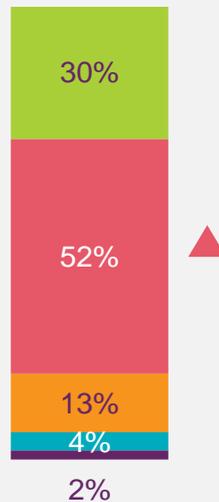
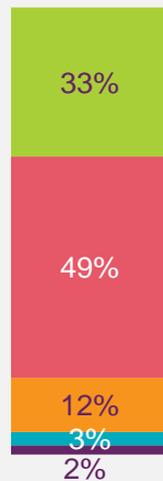
All finding 'easy'



% easy among sub-groups of ORS (see slide 8):

- ORS cancel = 78%
- ORS no-cancel = 87%

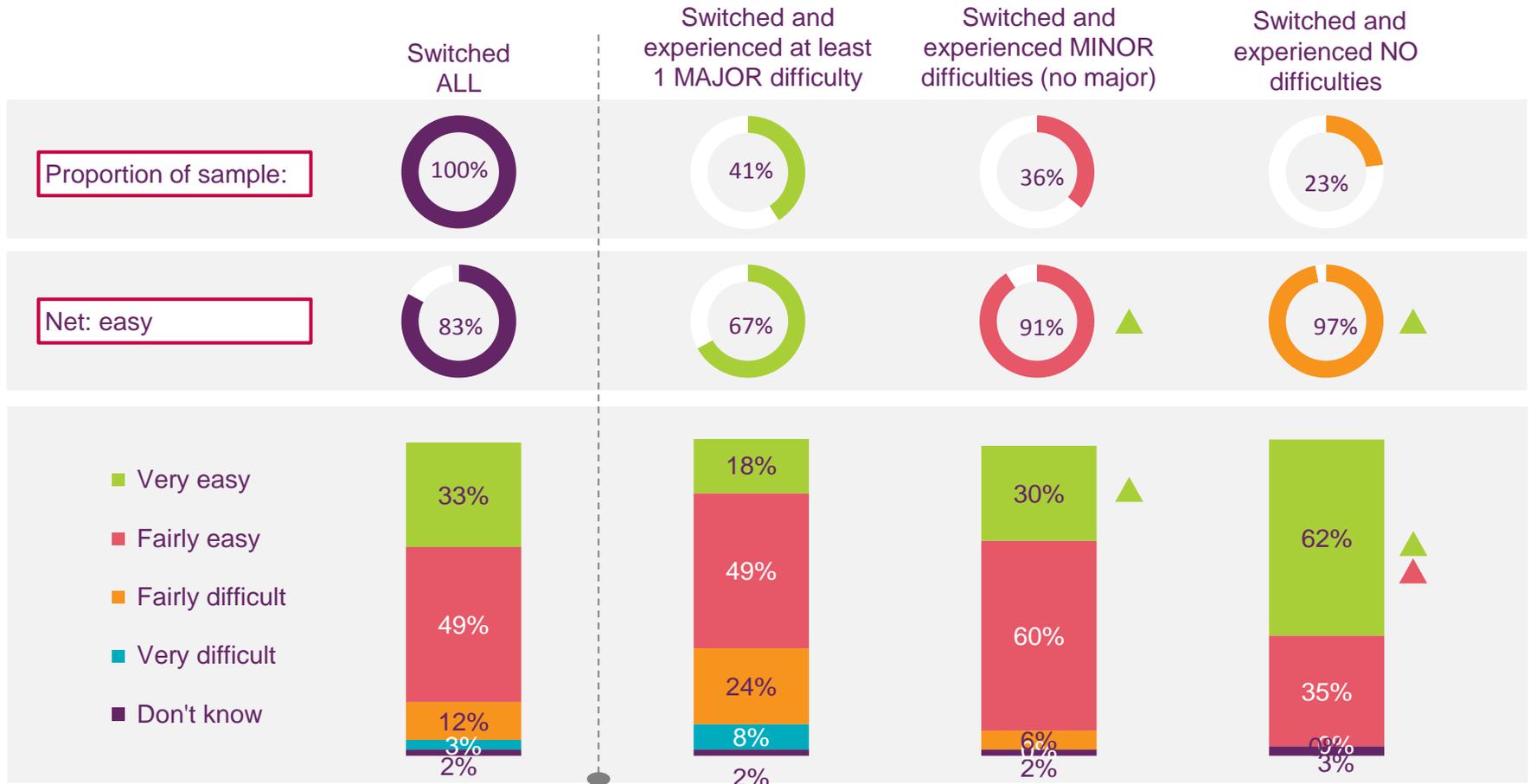
- Very easy
- Fairly easy
- Fairly difficult
- Very difficult
- Don't know



QG13 How would you rate your overall switching experience, i.e. from the point at which you decided you wanted to switch to the point you were using your new provider's service?
 Base: All switched in last 24m (1132), CPS (681), ORS (451), ORS cancel (143), ORS no cancel (308)

▲ ▼ Arrow denotes sig difference by process
 Direction of difference by up or down arrow
 Colour to which group the difference applies to

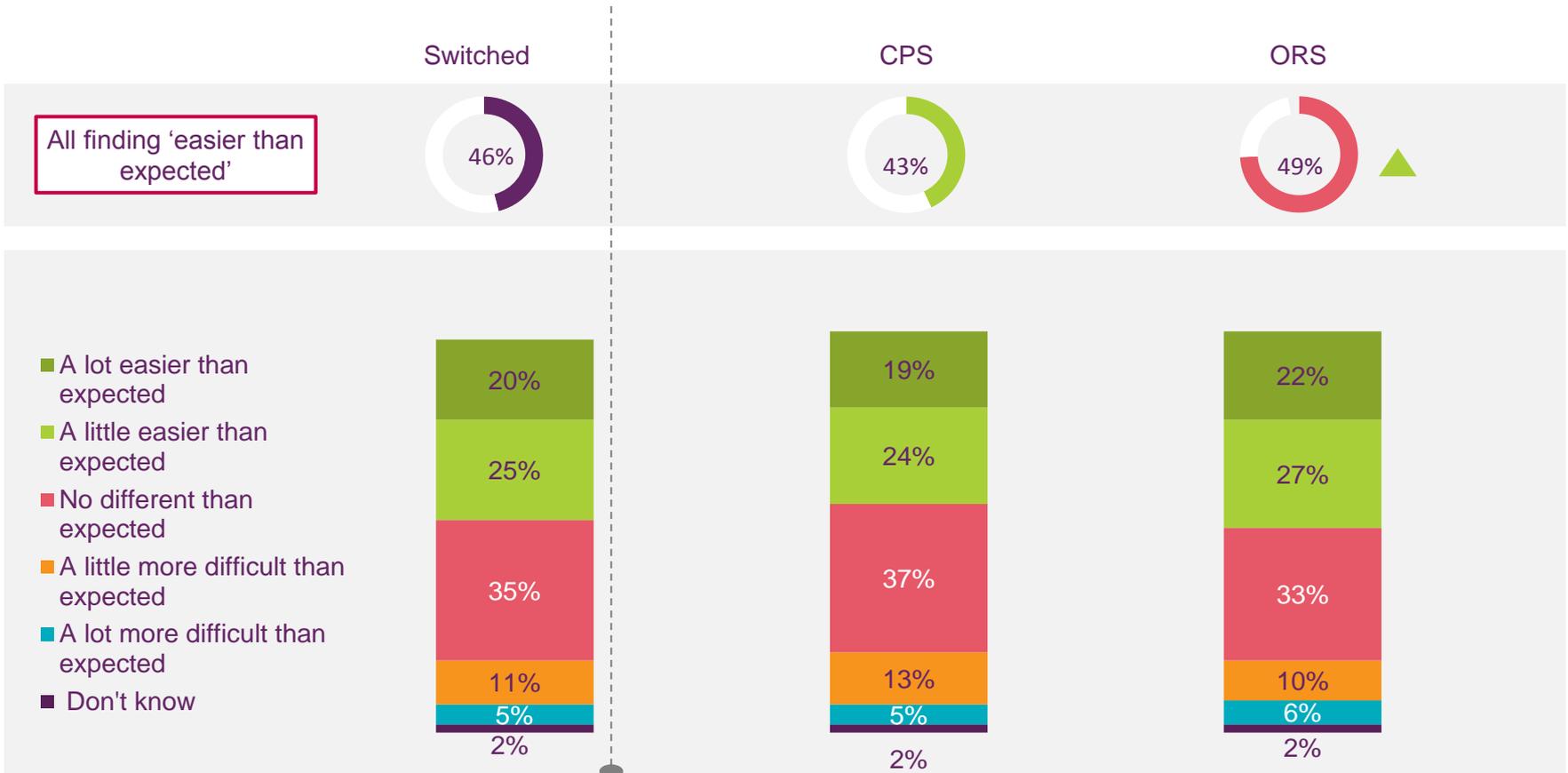
Experience of switching by experience of major difficulties



QG13 How would you rate your overall switching experience, i.e. from the point at which you decided you wanted to switch to the point you were using your new provider's service?
 Base: All switched in last 24m (1132), All switched and experienced a major difficulty (459), All switched and experienced a minor but not major difficulty (401), All switched and experienced no difficulties (272)

▲ ▼ Arrow denotes sig difference
 Direction of difference by up or down arrow
 Colour to which group the difference applies to

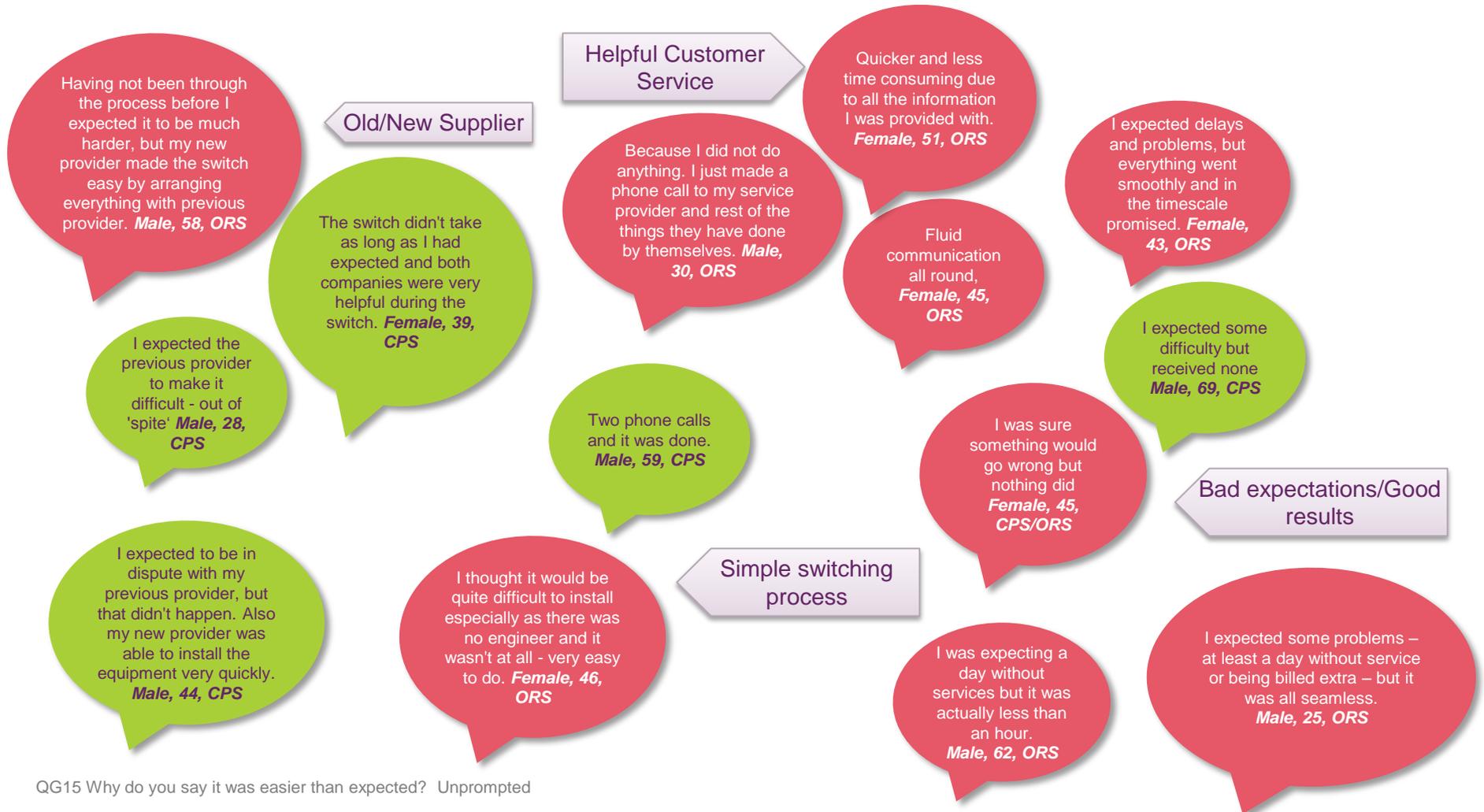
Experience vs. expectations



QG14 And how did this compare to what you had expected?
 Base: All switched in last 24m (1132), CPS (681), ORS (451)

▲ ▼ Arrow denotes sig difference
 Direction of difference by up or down arrow
 Colour to which group the difference applies to

Reasons: Switching easier than expected



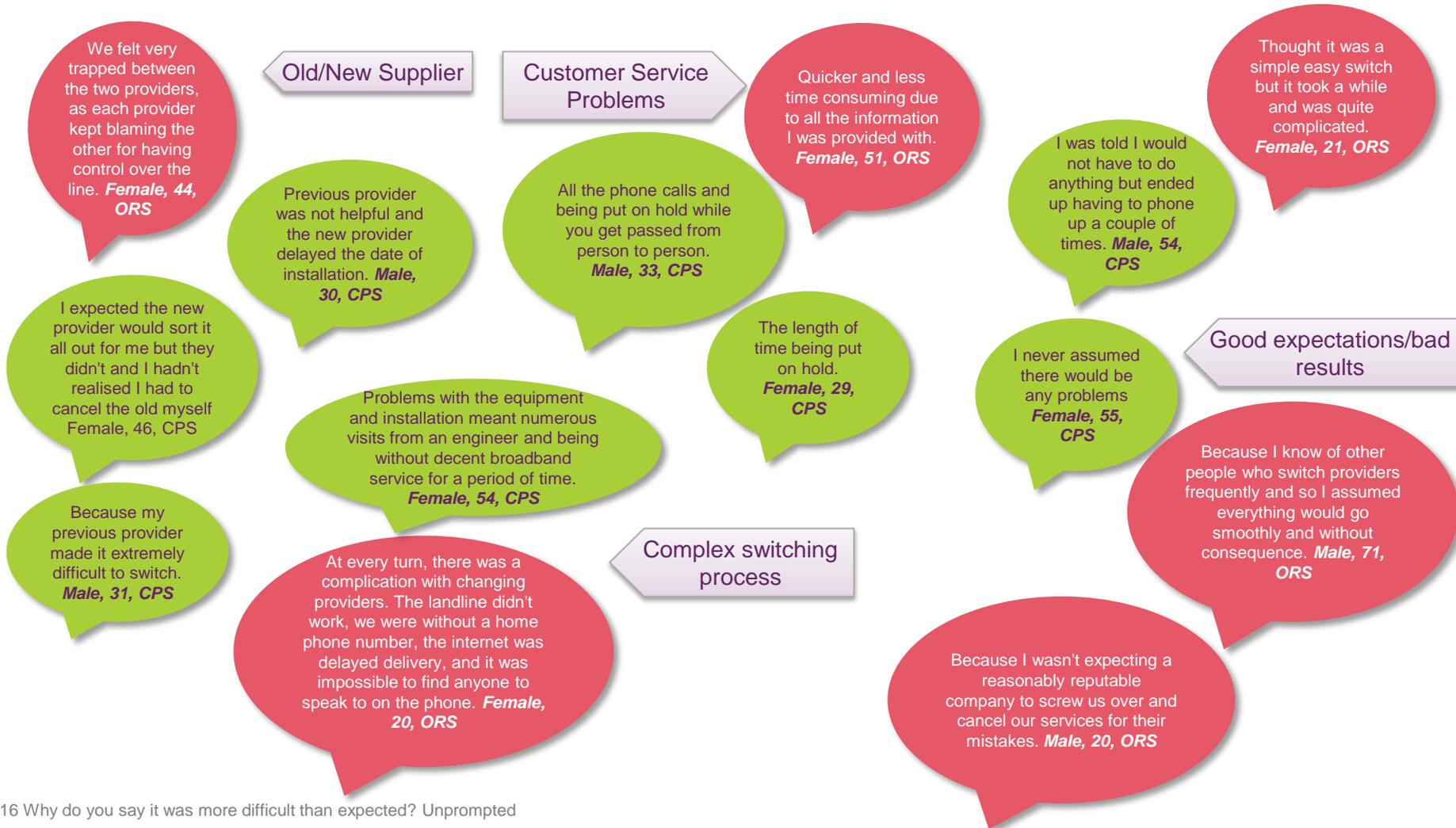
QG15 Why do you say it was easier than expected? Unprompted

Reasons: Switching was as expected

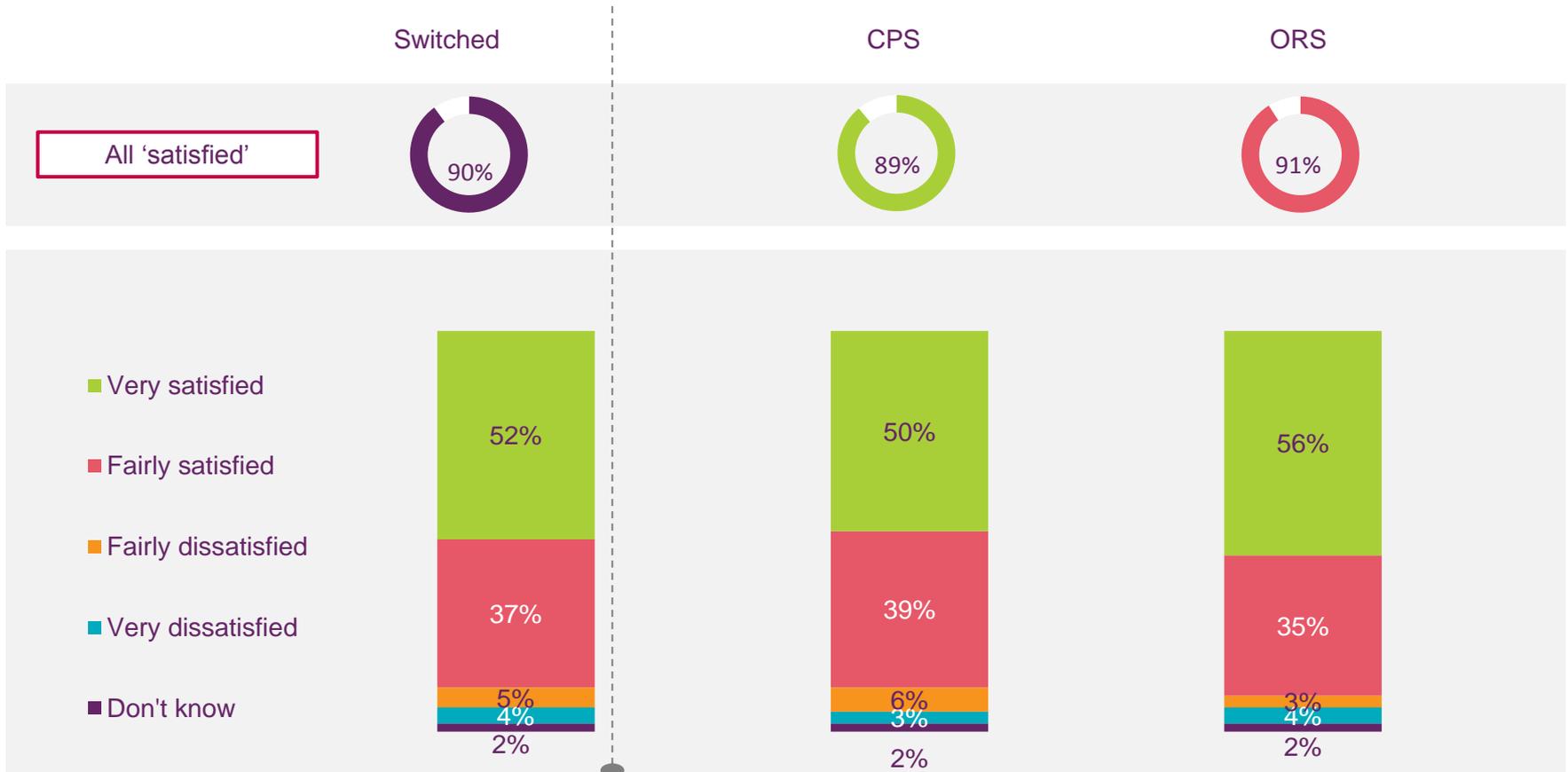


QG17 Why do you say it was no different than expected? Unprompted

Reasons: Switching was more difficult than expected

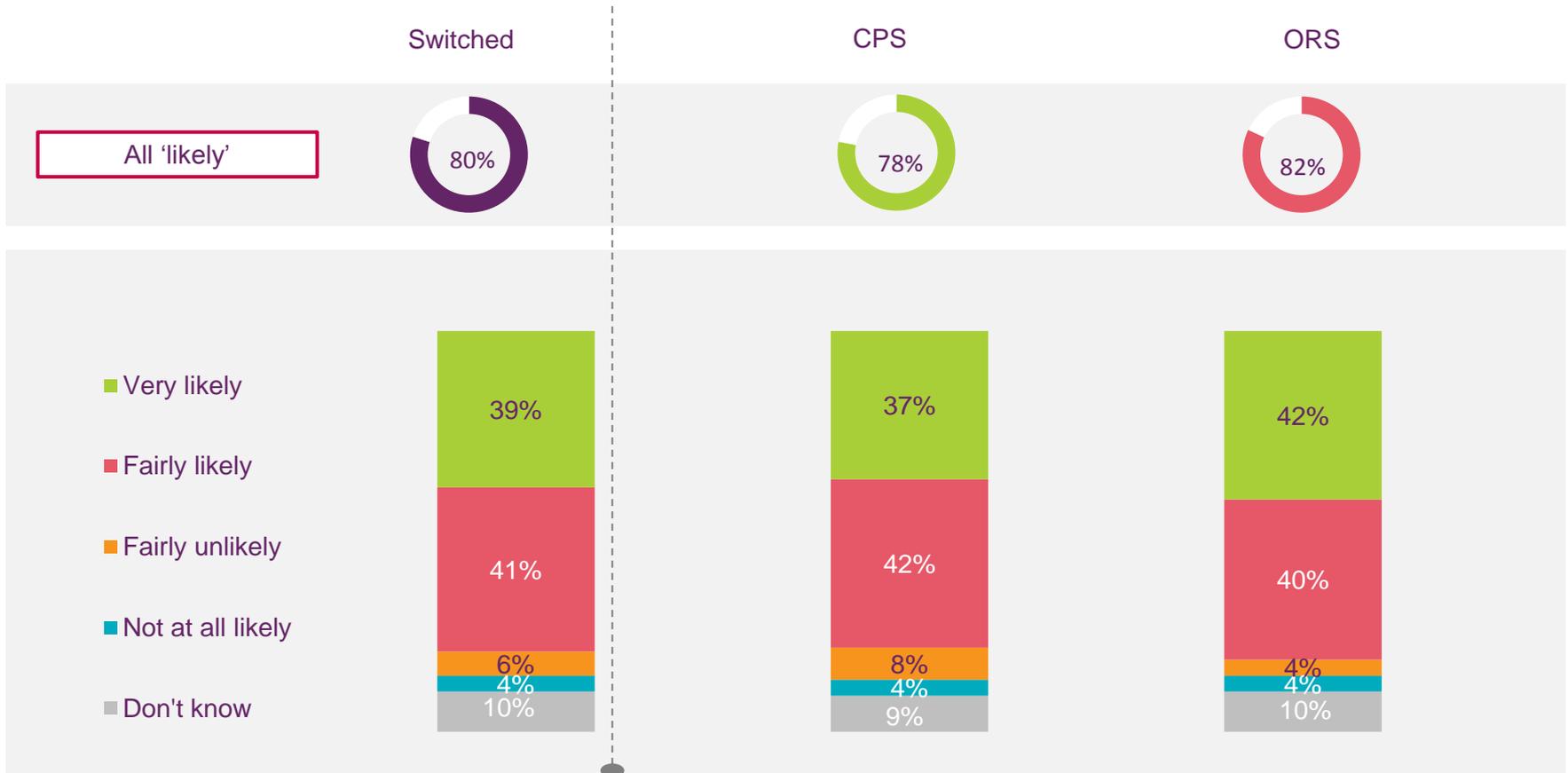


Satisfaction with decision to switch



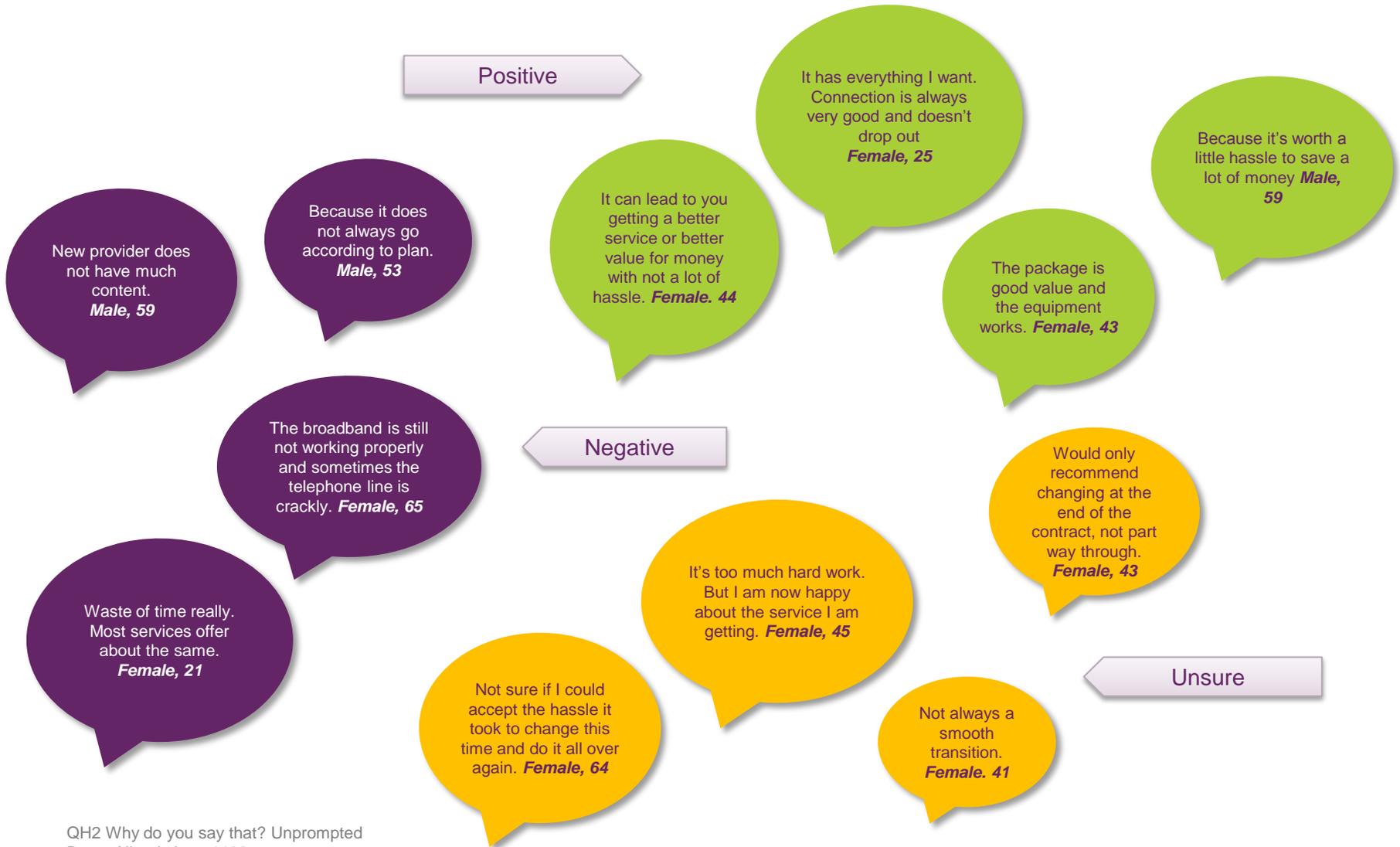
QG19 Overall, how satisfied are you with your decision to switch provider?
 Base: All switched in last 24m (1132), CPS (681), ORS (451)

Would recommend switching to someone else



QH1. Based on your experience, how likely are you to recommend switching <INSERT RELEVANT SERVICES USED> to someone else (e.g. a friend or relative)?
 Base: All switched in last 24m (1132), CPS (681), ORS (451)

Why respondents would/ would not recommend switching

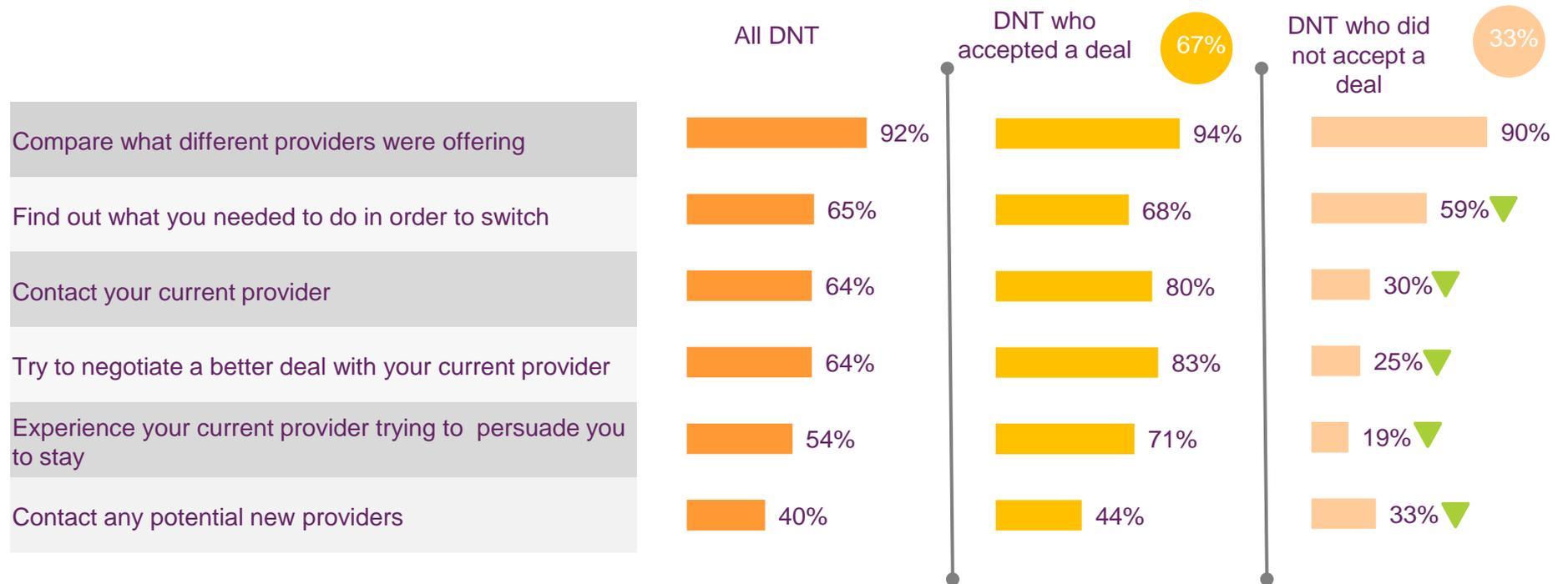


QH2 Why do you say that? Unprompted
Base: All switchers 1132

Main findings among Decided not to (DNT) switch:

ACTIVITIES UNDERTAKEN

Activities undertaken by those that considered switching but decided not to (DNT)



▲ Arrow denotes sig difference between those who accepted a better deal and those who didn't
 Direction of difference by up or down arrow

QC3 While considering switching your provider, did you...?

Base: All DNT (699), All DNT who accepted a better deal with current provider (466), All DNT who did not accept a better deal with current provider (233)

FACTORS IMPACTING DECISION NOT TO SWITCH

Factors impacting decisions by Major, Minor, Major & Minor and Main: (1 of 3)

Decided Not To, ordered on major



Note: Major & Minor may not equal the total of Major plus Minor due to rounding

	Major	Minor	Major & Minor	Main
I negotiated/accepted a deal with my current provider	50%	17%	67%	25%
Current providers still the best deal/cheapest	47%	27%	74%	11%
There wasn't enough cost difference for it to be worth switching	42%	30%	72%	6%
Current provider has the best quality of service	40%	33%	73%	6%
Worried service wouldn't be as good with a new provider	39%	35%	74%	4%
Prefer to stay with trusted/known	37%	40%	77%	3%
Didn't want to pay initial connection/ other start-up fees e.g. costs set top box etc.	29%	32%	61%	N/a
Problems/ issues with current provider are not sufficiently bad/frequent to switch	25%	34%	60%	N/a
I was worried about being without Broadband during the switch	25%	22%	47%	2%
Concern about arranging the services to start/stop at the right time	23%	35%	59%	1%
Didn't want to lose specific benefits/stored content e.g film /specific channels which came with previous package	22%	23%	46%	3%
Do not want to lose my phone number	21%	19%	40%	1%
Lack of Choice	20%	29%	49%	3%
Didn't want to pay the disconnection charge	20%	21%	41%	1%

QC3A Which, if any, of the following were factors that made you decide to stay with your current provider?

Base: All DNT (699)

Tables ordered major. Note: Main' figures may not total the net precisely due to rounding.

Factors impacting decisions by Major, Minor, Major & Minor and Main: (2 of 3)



Decided Not To, ordered on major

Note: Major & Minor may not equal the total of Major plus Minor due to rounding

	Major	Minor	Major & Minor	Main
Its too time consuming to go through the process of switching from one provider to another	20%	37%	57%	2%
Hassle to set up a new online account	19%	30%	49%	N/a
I was still in a contract so couldn't leave/would need to pay	18%	16%	34%	2%
Hassle of needing to contact more than one provider	17%	35%	52%	1%
I was worried I might have to pay two providers at the same time	16%	24%	40%	1%
Didn't want to have to install new equipment myself	16%	24%	40%	N/a
Didn't want to have to get engineer in to install the new equipment services(s)	15%	24%	40%	N/a
Difficulty comparing what other providers were offering	14%	36%	50%	N/a
I was worried about being without Landline during the switch	13%	17%	31%	1%
Difficulty cancelling my service	13%	24%	36%	1%
Other devices/products I own not working with new service	12%	21%	32%	N/a
Bad experience when switching my communication services previously	11%	15%	36%	<0.5%
Didn't want to learn a new service	11%	27%	37%	N/a

QC3A Which, if any, of the following were factors that made you decide to stay with your current provider?
 Base: All DNT (699) Tables ordered major. Note: Main figures may not total the net precisely due to rounding.

Factors impacting decisions by Major, Minor, Major & Minor and Main: (3 of 3)



Decided Not To, ordered on major

Note: Major & Minor may not equal the total of Major plus Minor due to rounding

	Major	Minor	Major & Minor	Main
Bad experience when switching other services previously	10%	20%	30%	N/a
Difficulty when contacting potential new provider(s)	10%	21%	31%	1%
Difficulty when contacting my current provider	9%	19%	28%	0%
Would take too long to research the market	9%	28%	37%	N/a
Not knowing what to do to switch	9%	23%	32%	<0.5%
Couldn't get permission to install new equipment where I live e.g. cables, satellite etc.	8%	7%	15%	N/a
I was worried about being without pay TV during the switch	7%	16%	23%	0%
Having to return providers equipment	7%	18%	26%	N/a

QC3A Which, if any, of the following were factors that made you decide to stay with your current provider?

Base: All DNT (699)

Tables ordered major. Note: Main figures may not total the net precisely due to rounding.

Process factors that made respondents *decide not to switch*

	Major	Minor	Main
I was worried about being without broadband during the switch	25%	22%	2%
Concern about arranging the services to start/stop at the right time	23%	35%	1%
I was worried I might have to pay two providers at the same time	16%	24%	1%
I was worried about being without landline during the switch	13%	17%	1%
Difficulty cancelling my service	13%	24%	1%
I was worried about being without pay TV during the switch	7%	16%	0%
Net: ANY process	45%	69%	6%

79% mentioned at least one of these factors as major or minor factor in their decision not to switch

QC3A Which, if any, of the following were factors that made you decide to stay with your current provider?

Base: All who considered but decided not to switch (699)

Tables ordered major. Note: Main figures may not total the net precisely due to rounding.

Contact with current provider as the stated reason for not switching



QC3AB You mentioned that difficulty contacting your current provider was a factor in deciding not to switch your services. What was it about the experience that was difficult? Unprompted

Contact with potential new provider as the stated reason for not switching



QC3AC You mentioned that difficulty contacting your potential new provider(s) was a factor in deciding not to switch your services. What was it about the experience that was difficult?
Unprompted

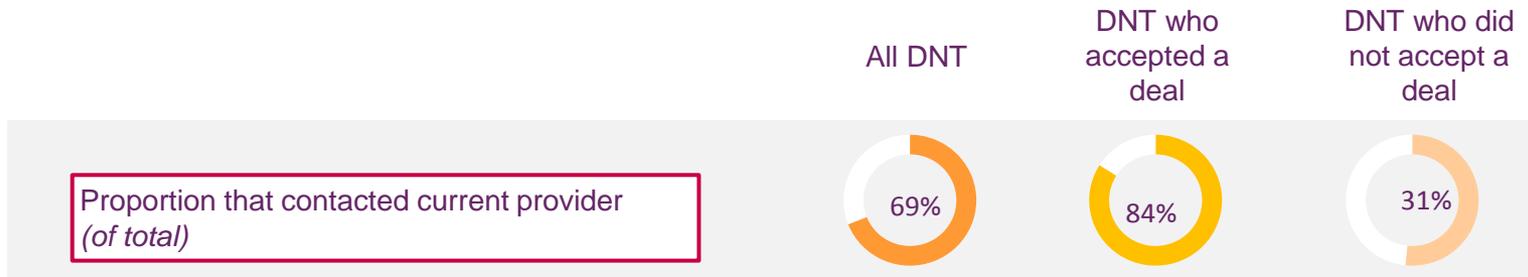
Reasons for stating problems cancelling the service



QC3AF You mentioned you experienced difficulty cancelling your service. What was it about the experience that was difficult? Unprompted

CONTACT WITH PROVIDER

Point at which DNTs contacted current provider



Point/ points when contacted current provider (of those that had done so):

Point/ points when contacted current provider (of those that had done so):	All DNT	DNT who accepted a deal	DNT who did not accept a deal
Before I had looked at any alternatives/contacted any other providers	19%	18%	22%
After I had looked at alternatives but before I had made a final decision	65%	69% ▲	47%
After I had made a decision on an alternative provider, but before I had signed up	10%	9%	18% ▲
After I had signed up with an alternative provider	4%	3%	3%
Don't know/don't recall	8%	6%	17% ▲

QF4 And at what point or points did you contact your current service provider?

Base: All DNTs who contacted previous provider and: total (466), DNTs who accepted a better deal (394), DNTs who did not accept a better deal (72*) *Low base size

Reasons for contacting previous provider (1 of 2)



Reasons for contacting previous provider (of those that did):

Reason	DNT	DNT who accepted a deal	DNT who did not accept a deal
To negotiate a better deal with my current provider	57%	60% ▲	39%
To talk about their products and services	20%	20%	18%
To cancel my service/ give notice	16%	16%	11%
To find out when my contract ended	15%	14%	24% ▲
To find out what I needed to do to change provider	12%	11%	17%
To find out if I had a notice period	12%	10%	18%
To check how much my final bill would be	9%	9%	11%
To complain/ report an issue	9%	8%	14%
To obtain information about my contract e.g. my usage patterns/spend	8%	8%	11%

QF5 And which if any of these were reasons you contacted your previous provider?

Base: All decided not to (699), DNT and accepted a deal (466), DNT and did not accept a deal (233). All who contacted previous provider: DNT (444), Accepted a deal (375), Did not accept a deal (69)

Reasons for contacting previous provider (2 of 2)



Reasons for contacting previous provider (of those that did):

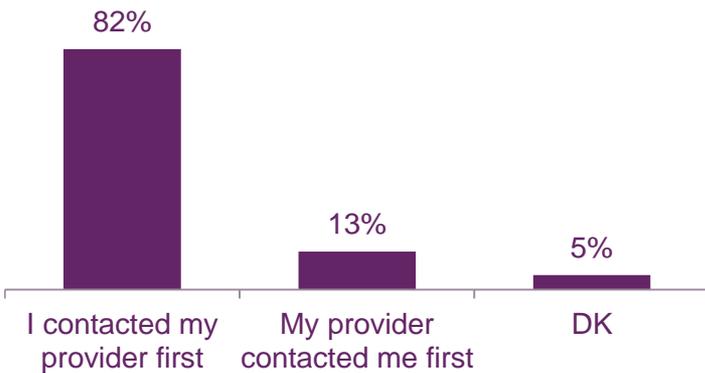
	DNT	DNT who accepted a deal	DNT who did not accept a deal
To understand content that might be affected, e.g. that I might lose by switching	8%	9%	7%
To find out about any other charges for ending my contract	8%	7%	11%
To find out about any charges for ending my contract early	8%	7%	11%
To arrange the 'stop date' in order to avoid a break in service	6%	5%	8%
To arrange the 'stop date' in order to avoid paying both providers at the same time	5%	5%	7%
To confirm that service was cancelled	3%	3%	3%
Other	3%	3%	6%
Don't know/don't recall	5%	4%	8%

QF5 And which if any of these were reasons you contacted your previous provider?

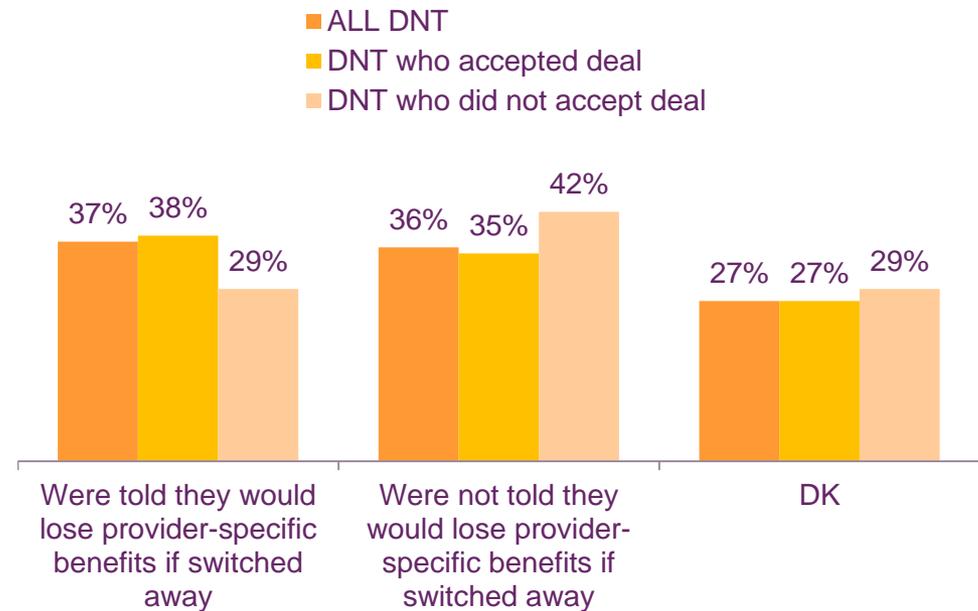
Base: All decided not to (699), DNT and accepted a deal (466), DNT and did not accept a deal (72*)

Who made first contact when negotiated/ accepted a better deal

Who made contact first:
(Proportion of those who accepted a deal):

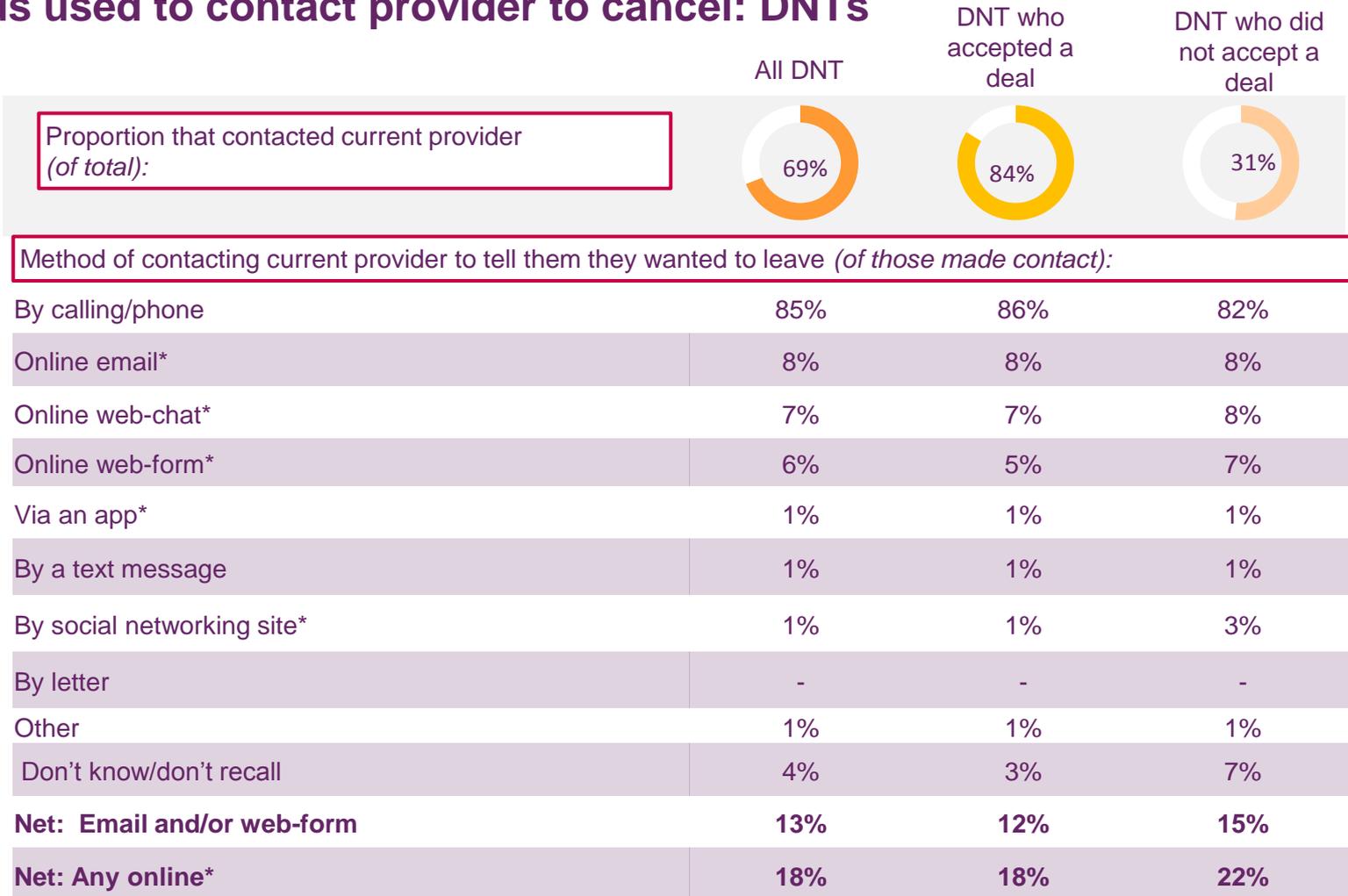


When they were contacted whether they were told about provider-specific benefits:



QC3AE When you negotiated/ accepted a deal with your current provider, who made the first contact?
Base: All who considered but decided not to switch and negotiated/ accepted a deal: (465)

Methods used to contact provider to cancel: DNTs

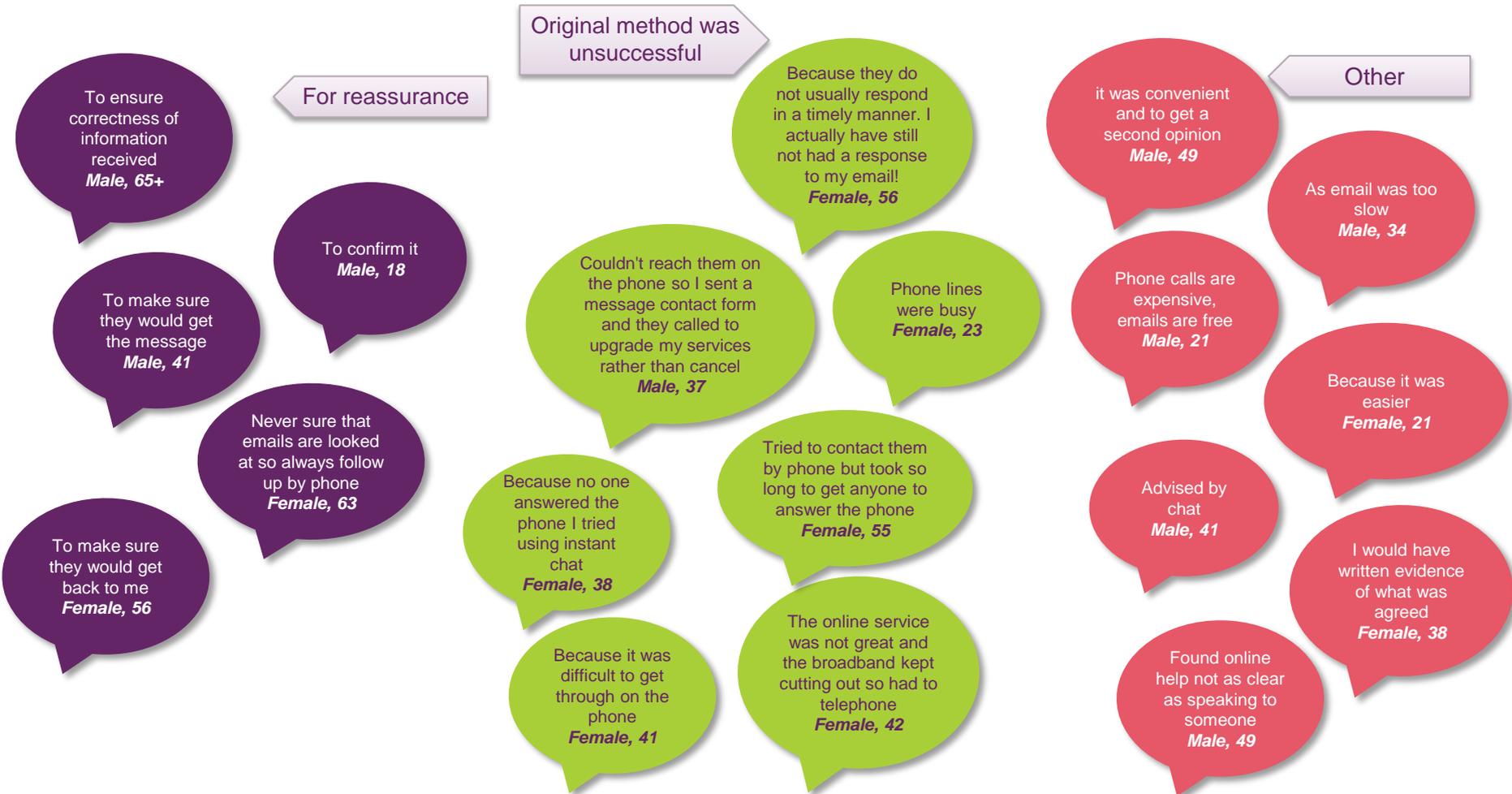


QF6 Which of these methods did you use to contact your provider to tell them you wanted to leave/cancel your service? Multi-code

Base: All DNTs who contacted previous provider and: total (444), DNTs who accepted a better deal (375), DNTs who did not accept a better deal (69*) *Low base size treat as indicative only

* Online = email, web-chat, web-form, app, social networking site.

Reasons for contacting via more than one method



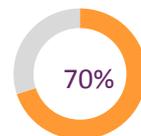
QF7 Why did you contact your provider to tell them you wanted to leave/cancel your service more than one method? Unprompted

Words used to describe the contact with current provider

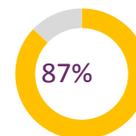


Proportion that recalled contact with current provider when considering switching:

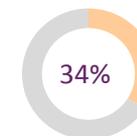
All DNT



DNT who accepted a deal



DNT who did not accept a deal



Words used to describe contact (of those that recalled contact)	Decided not to	Accepted a deal	Did not accept a deal
Helpful	55%	60%	28%
Informative	44%	48%	25%
Time-consuming	32%	30%	43%
Frustrating	28%	24%	46%
Reassuring	19%	20%	13%
Essential	16%	18%	8%
Unhelpful	16%	11%	40%
Unnecessary	6%	5%	14%
Don't know/don't recall	3%	2%	6%

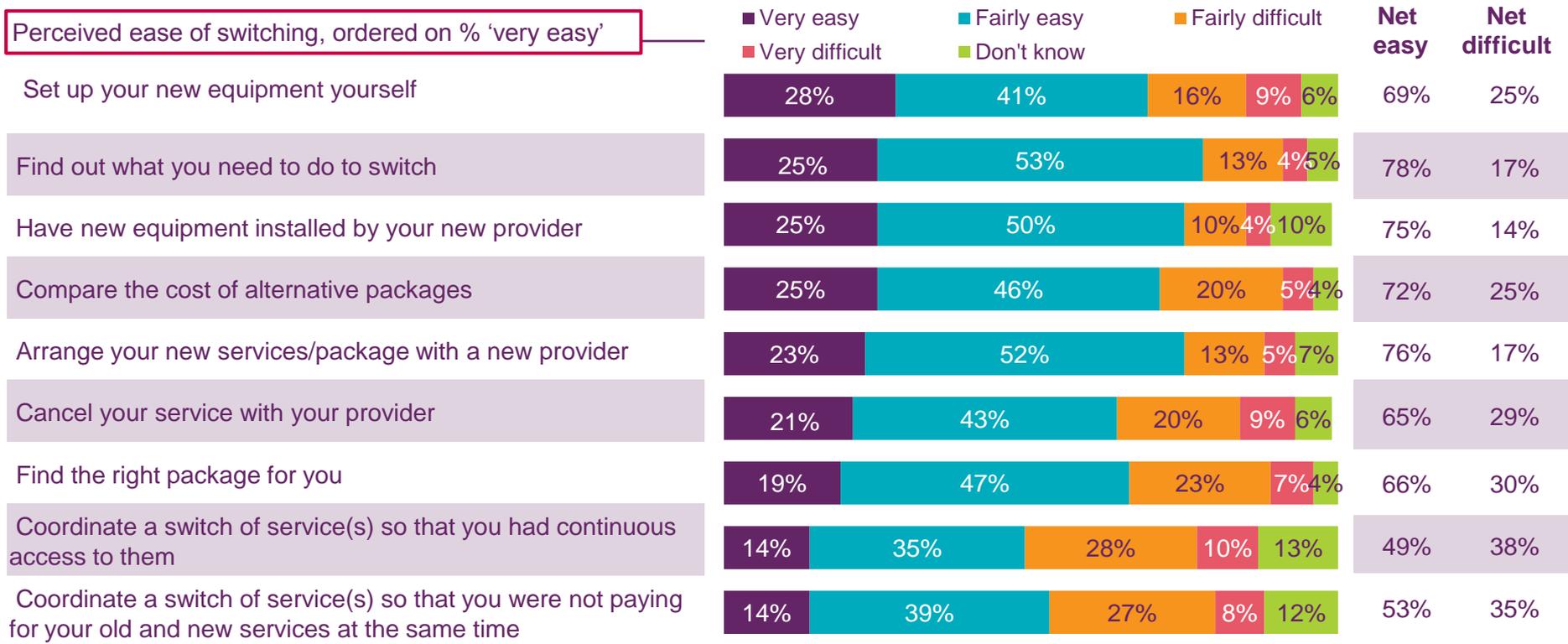
QF15 And still thinking about all the conversations you had with your provider when you were considering switching, which of the following words would you use to describe this contact? Multi-code

Base: All switchers that had contact with previous provider when switching, (487), Accepted a deal (407), Did not accept a deal (80)

ATTITUDES TO SWITCHING

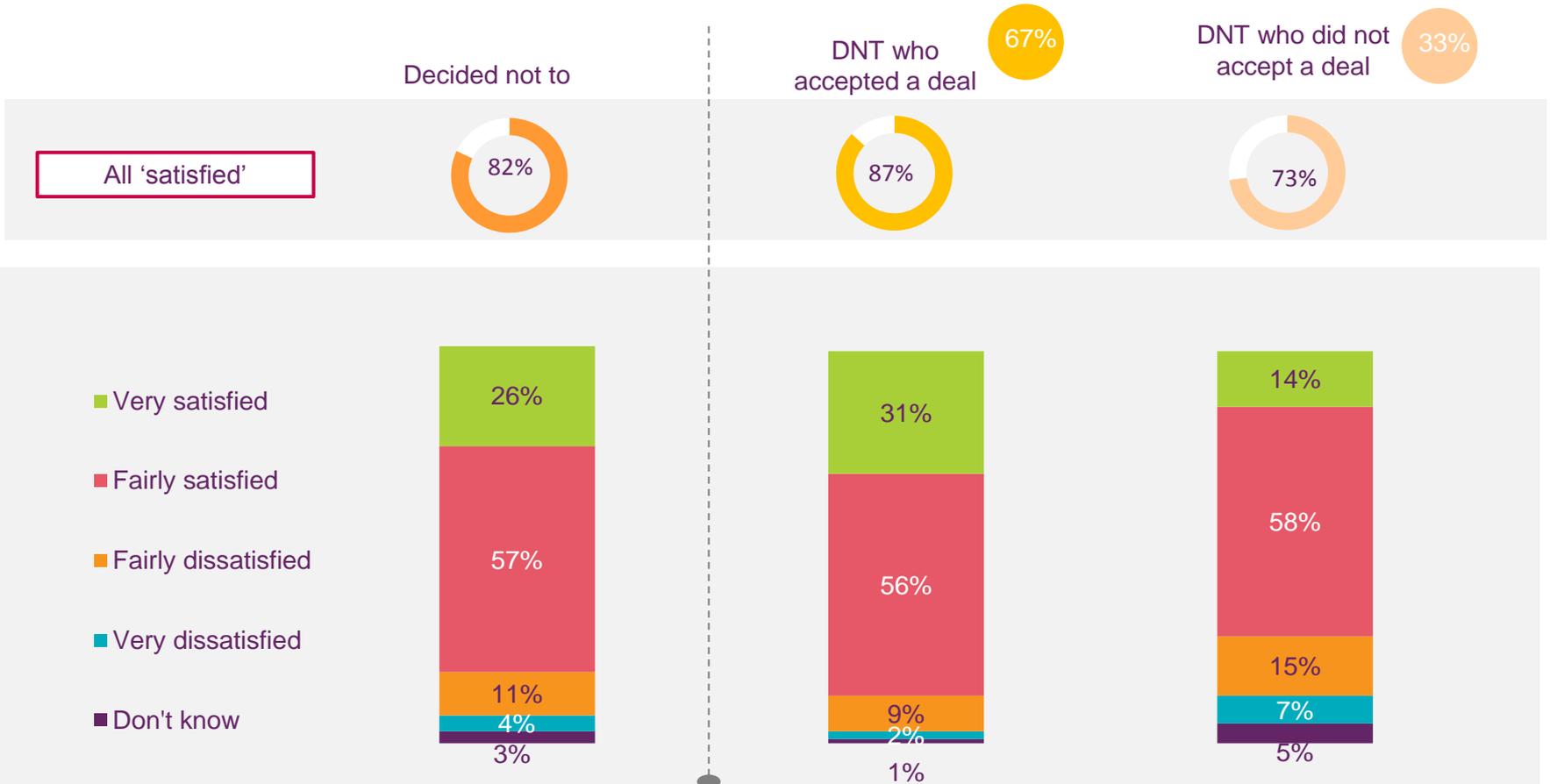
Perceived ease of switching (all DNT)

Perceived ease of switching, ordered on % 'very easy'



QG18 How easy or difficult do you think it would be to do each of the following?
 Base: All who considered but decided not to switch: (699)

Satisfaction with decision to stay with current provider

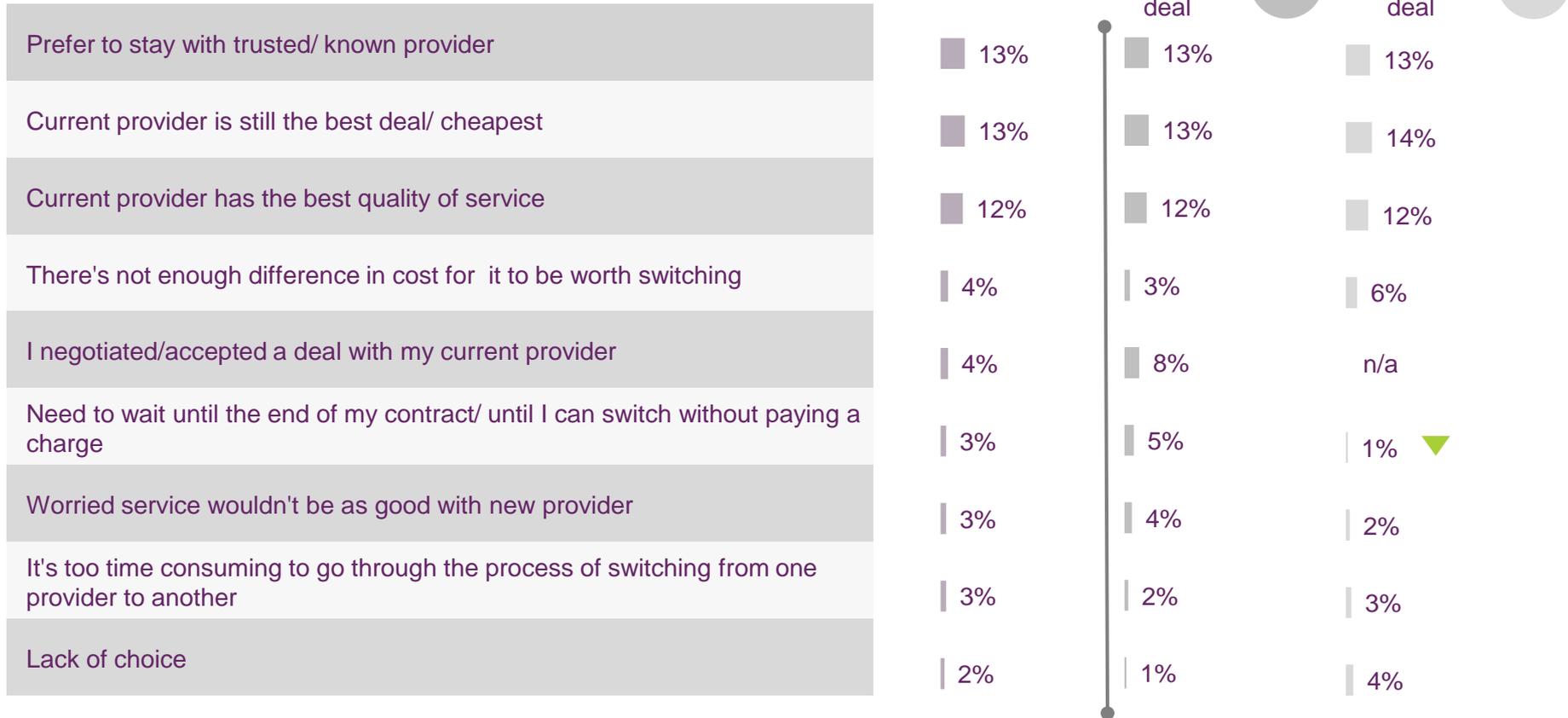


QG19 Overall, how satisfied are you with your decision to stay with your <INSERT RELEVANT SERVICES FROM QB1 > provider?
 Base: All decided not to switch (1124), All accepted a deal (466), All did not accept a deal (233)

Main findings among Non-switcher/Non-Active Considerer (NS/NACs):

FACTORS IMPACTING DECISION NOT TO SWITCH OR CONSIDER SWITCHING

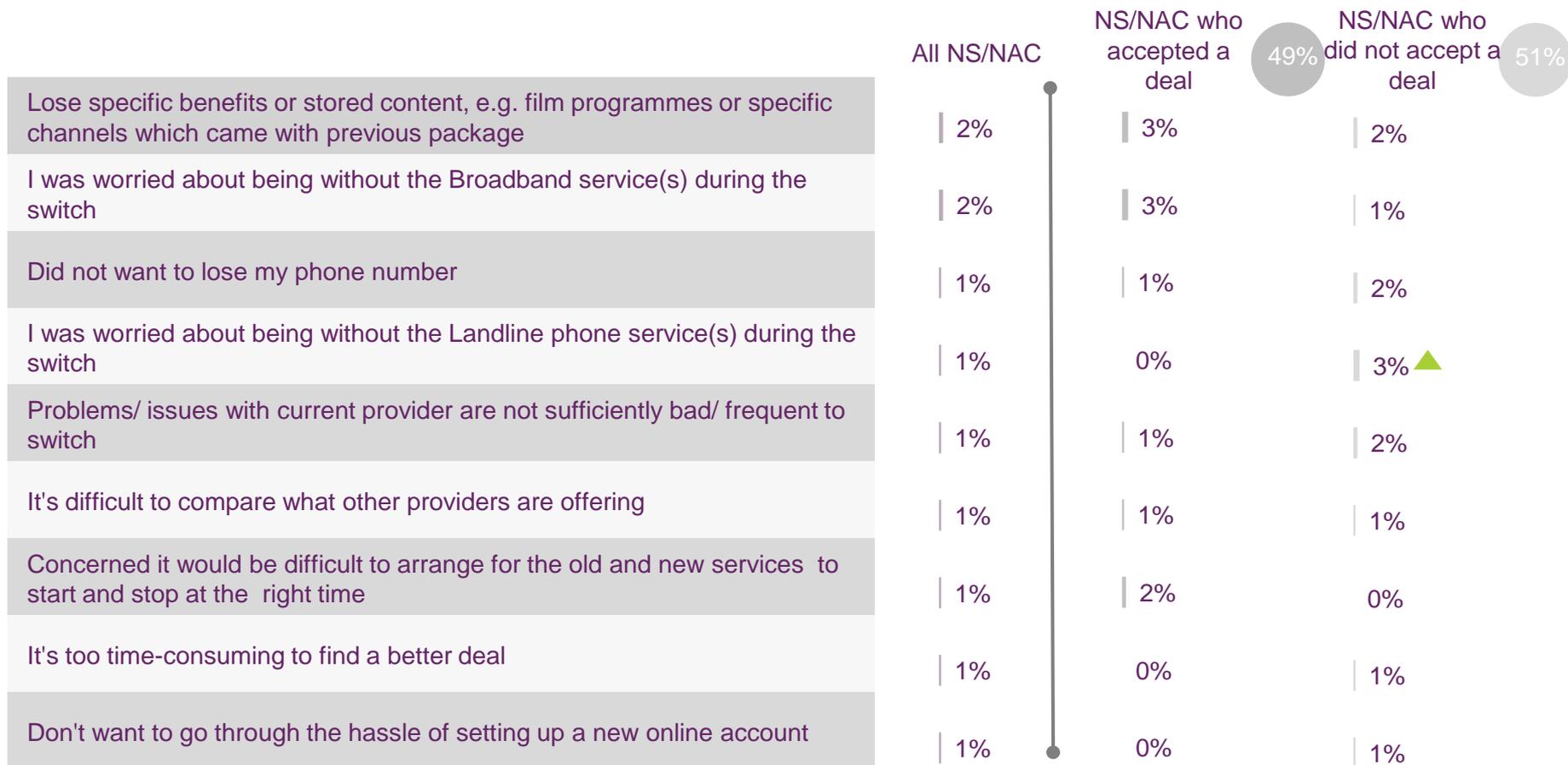
Why did not switch/actively consider switching (1 of 3, MAIN Factors)



QC4AA And which, if any of these, were the main factor for not switching or actively consider switching your current provider to another provider or providers?
 Base: All Not switched/ Not considered (698), All Not switched/ Not considered who accepted a better deal with current provider (339), All Not switched/ Not considered who did not accept a better deal with current provider (359)

▲ Arrow denotes sig difference between those who accepted a better deal and those who didn't
 Direction of difference by up or down arrow

Why did not switch/actively consider switching (2 of 3, MAIN factors)

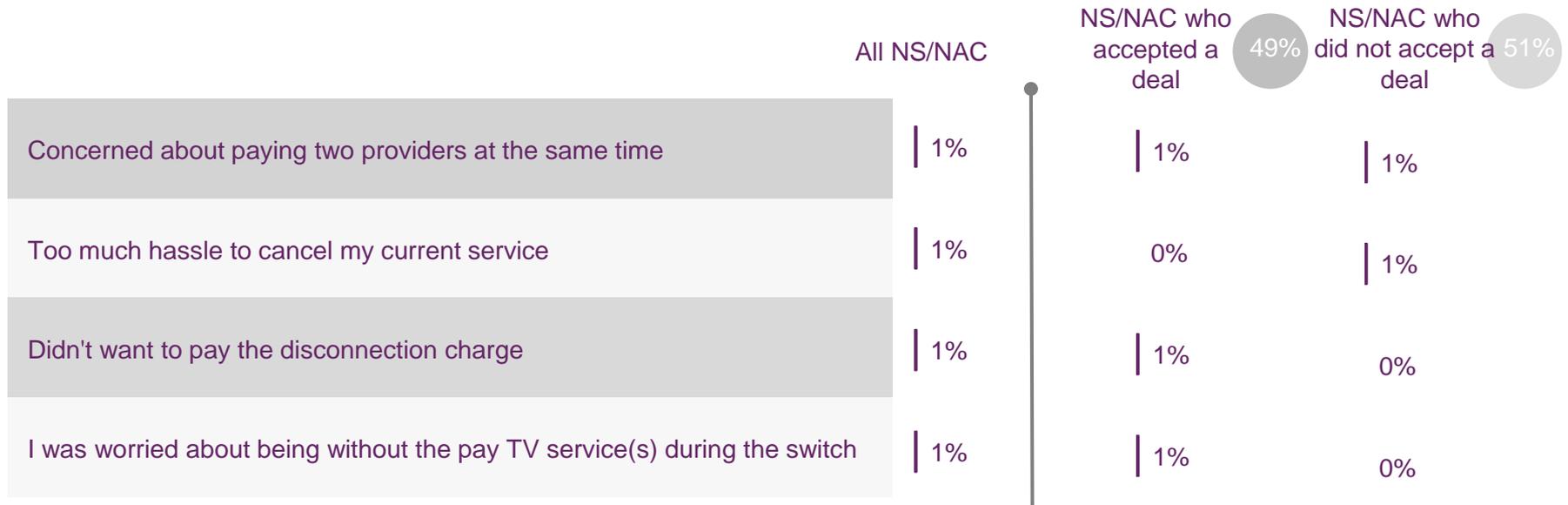


QC4AA And which, if any of these, were the main factor for not switching or actively consider switching your current provider to another provider or providers?

Base: All Not switched/ Not considered (698), All Not switched/ Not considered who accepted a better deal with current provider (339), All Not switched/ Not considered who did not accept a better deal with current provider (359)

▲ Arrow denotes sig difference between those who accepted a better deal and those who didn't
Direction of difference by up or down arrow

Why did not switch/actively consider switching (3 of 3, MAIN factors)



0 or <0.5%:

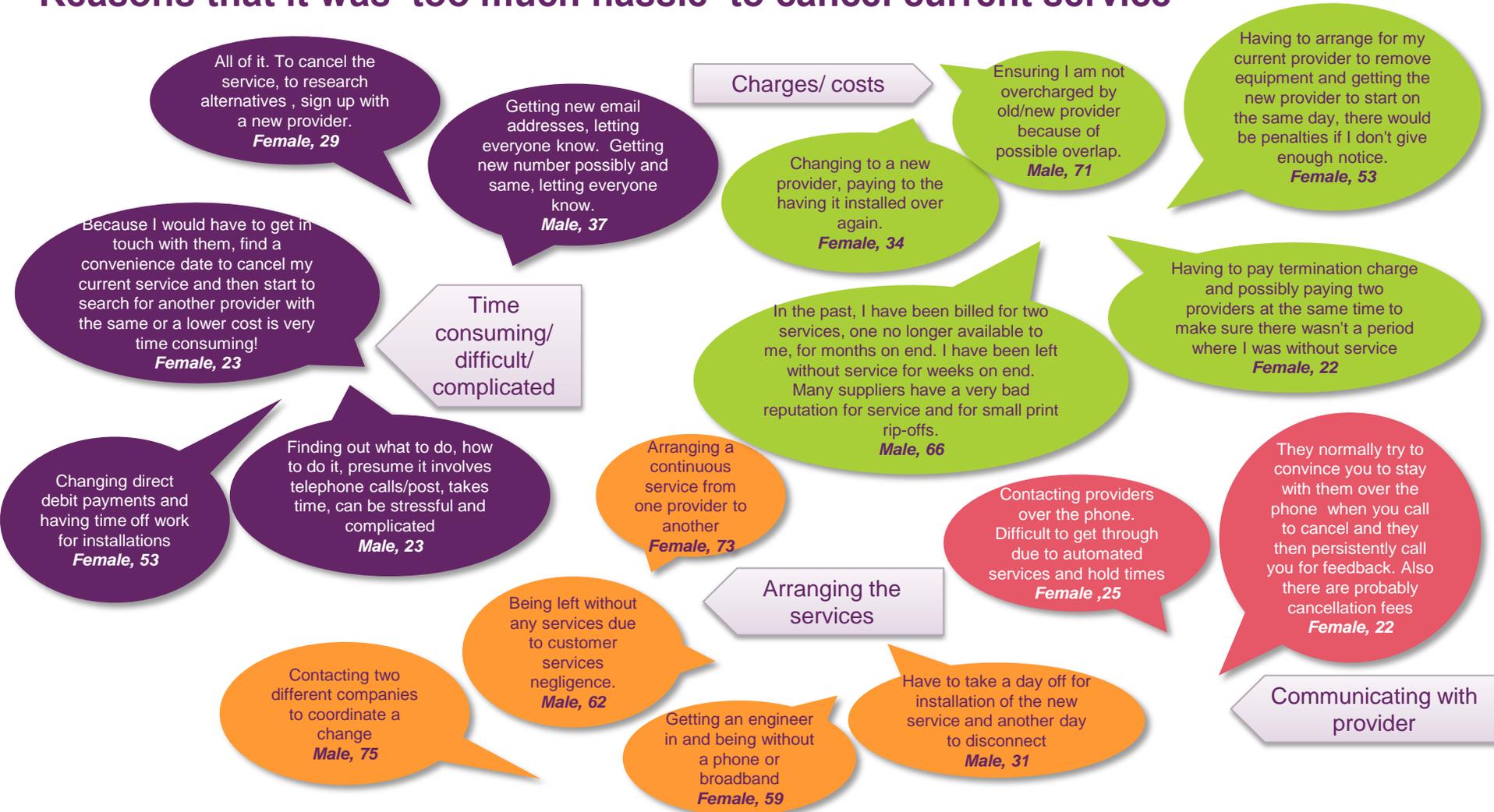
Did not want to contact current provider
Just haven't had time/ haven't got around to it yet
Having to return provider's equipment
Did not want to have to install new equipment myself
Did not want to have to get engineer in to install the new equipment/service(s)
Didn't want to contact potential new provider(s)
Don't know how to change provider/ switch
Bad experience when switching my communication services previously
Bad experience switching other service previously
Concern about other devices/products I own not working with new service(s)
Could not get permission to install new equipment where I live e.g. cables, satellite, etc.
Learning how to use a new service

- 92% had a major factor and therefore could give a 'main' reason
- 8% could not choose a 'main' reason
- 6% were not sure

QC4AA And which, if any of these, were the main factor for not switching or actively consider switching your current provider to another provider or providers?

Base: All Not switched/ Not considered (698), All Not switched/ Not considered who accepted a better deal with current provider (339), All Not switched/ Not considered who did not accept a better deal with current provider (359)

Reasons that it was 'too much hassle' to cancel current service



QC3AB You mentioned that difficulty contacting your current provider was a factor in deciding not to switch your services. What was it about the experience that was difficult? Unprompted

Reasons that they did not want to contact their current provider

It would feel disloyal
Female, 80

Being put on hold for a long time, trying to convince me to stay even though my mind was set up
Female, 32

They have a reputation (bad) of not wanting to let you go and hassle customers on the phone. One of my neighbours tried to leave sky and couldn't, after a year of trying and even having her phone line cut off and then blocked from other providers, she had to get a lawyer to deal with them.
Female, 61

Attempt at 'save'

They would always try to renegotiate & make it difficult to leave
Female, 42

Can take a long time to access the person you need
Female, 64

I don't like talking to call centre agents
Female, 34

I have always been put through to an automated machine which makes it very difficult to get to talk to an actual advisor
Female, 19

Experience on phone

Previous experiences with their customer services are off putting, you only get to speak to the nice people after the first 2 have tried to fob you off.
Female, 36

It is always a bit of a nightmare contacting BT
Female, 82

Difficult to contact supplier due to hearing disability
Male, 69

Not ready

Have made contact before but ended up in an Indian Call Centre and didn't understand much of what was being said.
Male, 74

Sometimes get through to call centre, after a long wait, only to find I can't always understand what they are saying
Female, 65

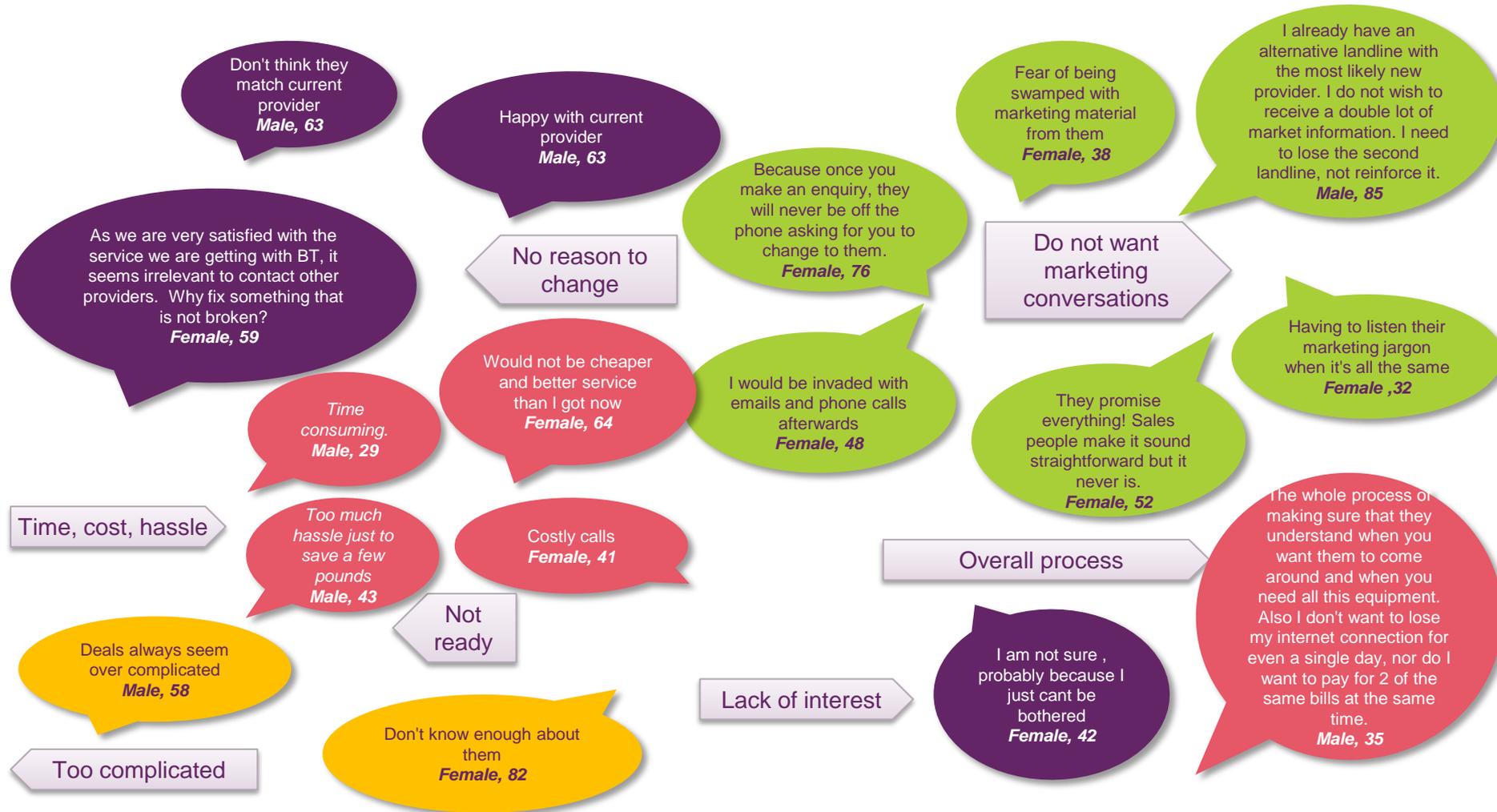
Difficulty understanding

I didn't want to contact my provider as I don't fully know if I want to stay with them or not.
Female, 21

Still looking around.
Male, 44

I don't want the hassle
Female, 22

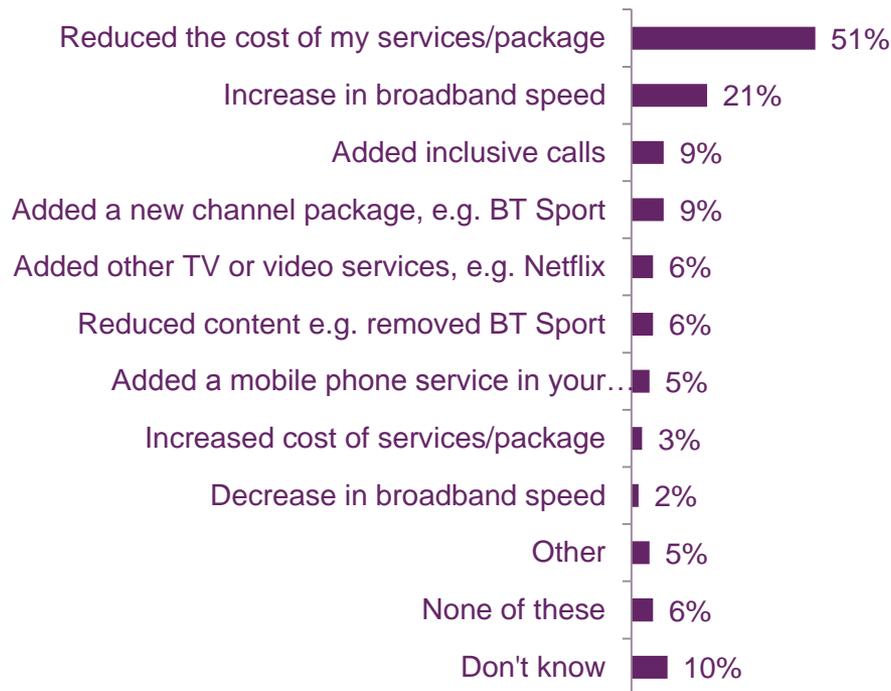
Reasons that they did not want to contact their current provider



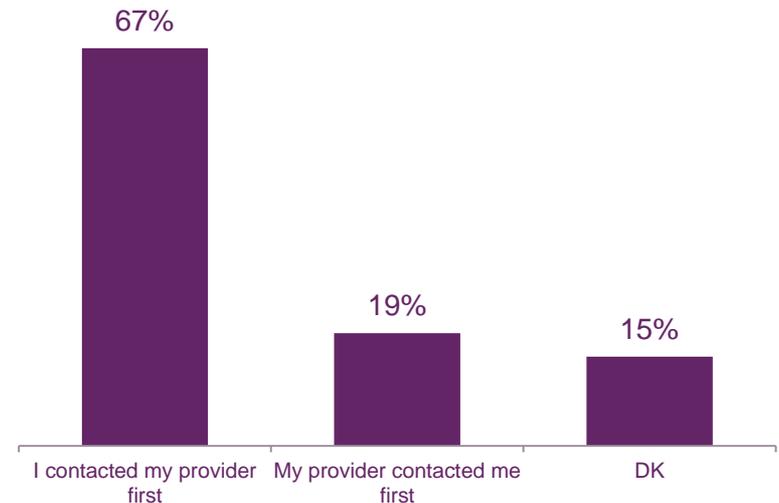
QC3D You mentioned you did not want to contact potential new providers. What, if anything made you not want to contact potential new providers? Unprompted

What was involved in the deal negotiated with current provider

What was involved in deal with current provider
(Based on those who negotiated/ accepted a deal):



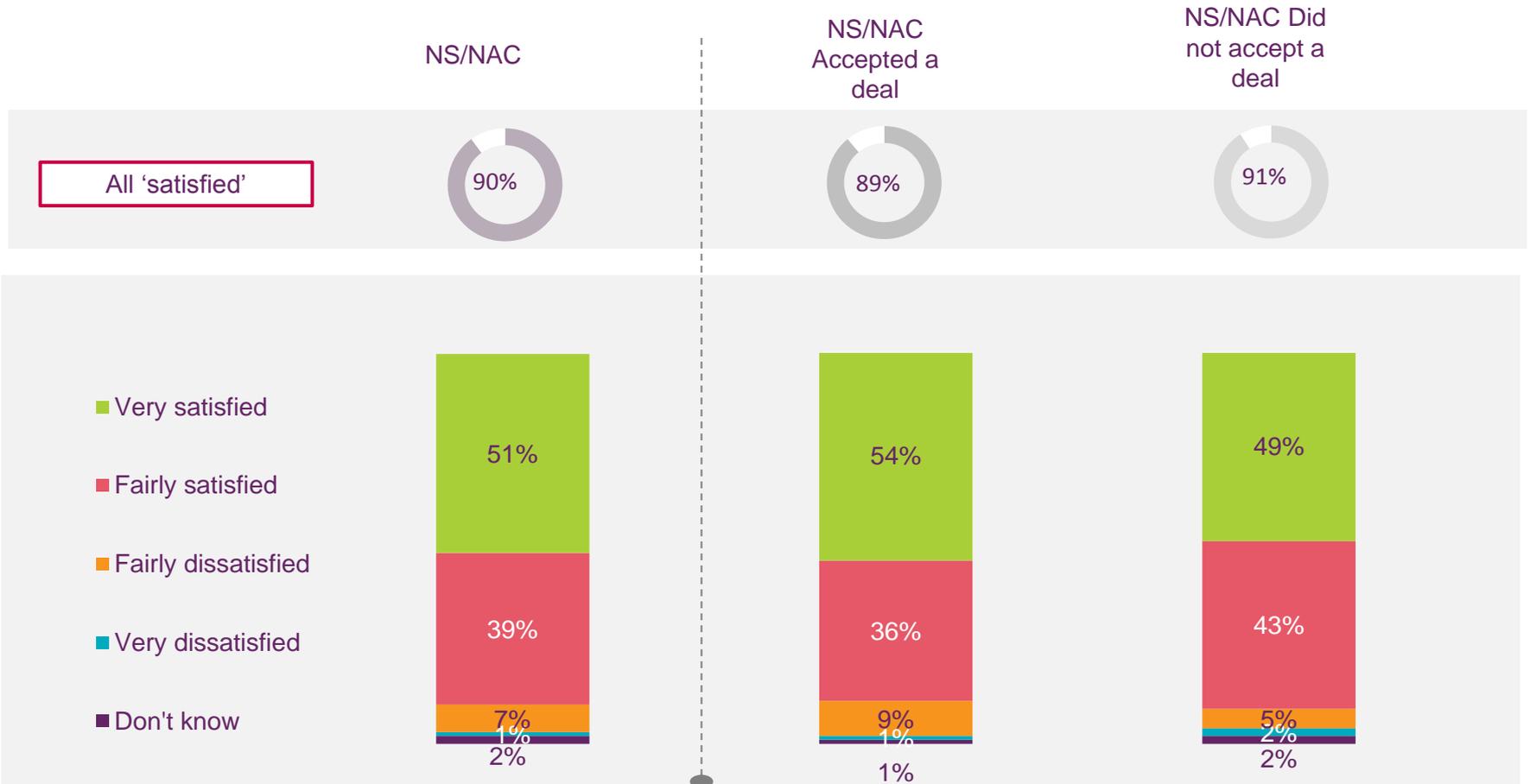
Who made contact first:
(Based on those who negotiated/ accepted a deal):



QC4AE. You mentioned you negotiated/ accepted a deal with your current provider. Which, if any of the following did this involve?
Base: All NS/NAC that accepted a deal with current provider (339)

ATTITUDES TO SWITCHING

Satisfaction with decision to stay with current provider



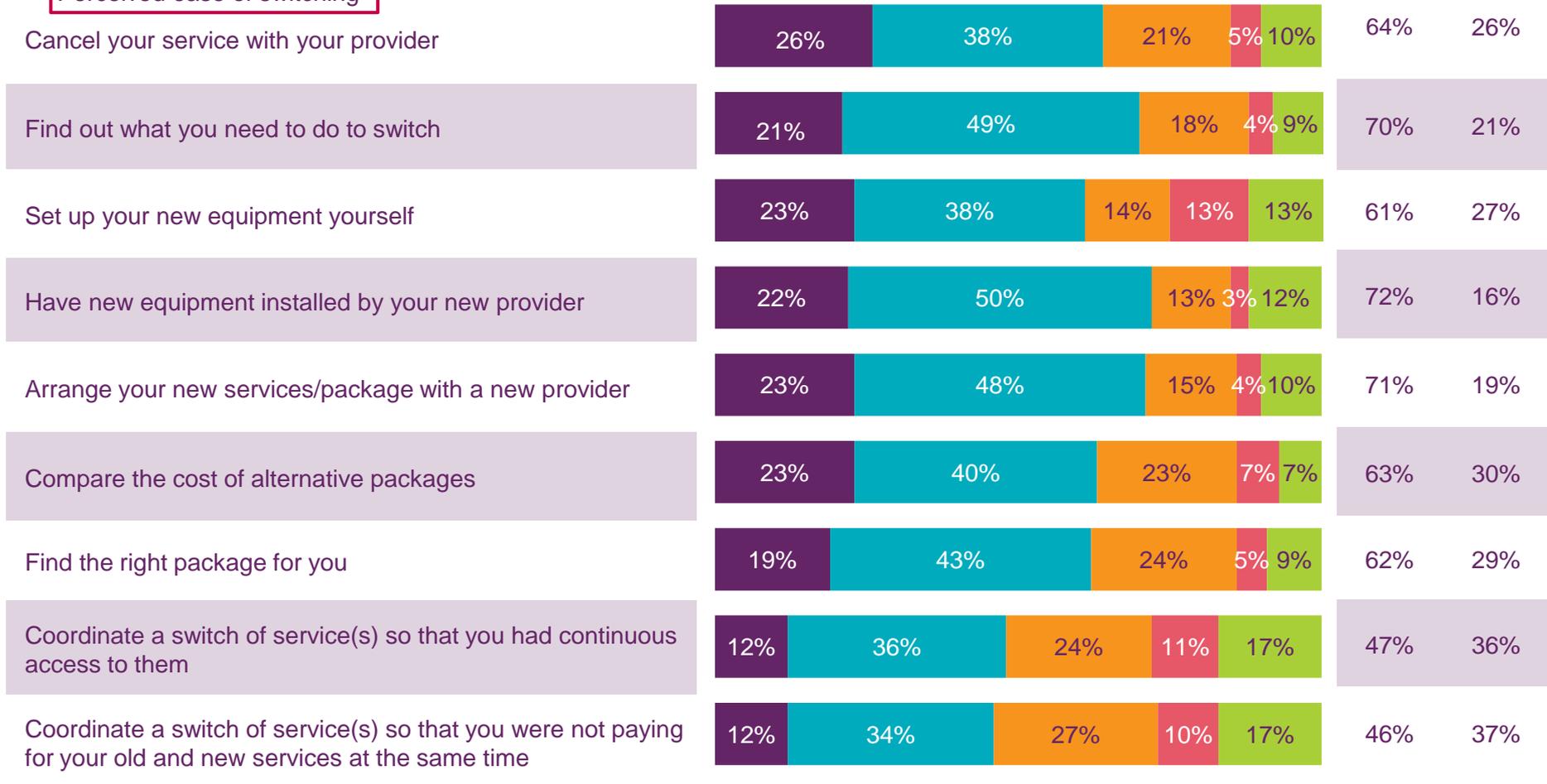
QG19 Overall, how satisfied are you with your decision to stay with your <INSERT RELEVANT SERVICES FROM QB1 > provider?
 Base: All NS/NAC (698), All accepted a deal (339), All did not accept a deal (359)

Perceived ease of switching

■ Very easy ■ Fairly easy ■ Fairly difficult ■ Very difficult ■ Don't know

Net easy **Net difficult**

Perceived ease of switching



QG18 How easy or difficult do you think it would be to do each of the following? Ordered as per questionnaire.
Base: All Not switched/ Not considered: (698)

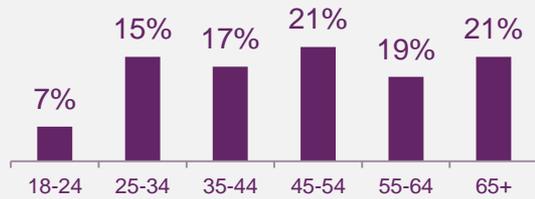
Annex: Demographic and attitudinal profile of key sample groups

Demographics of key sample groups

Gender



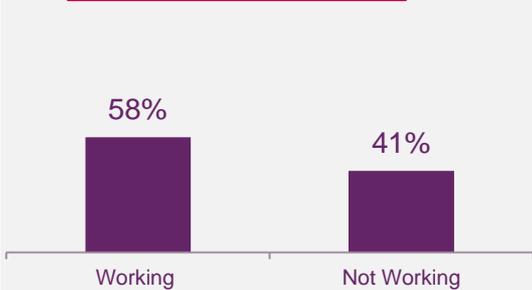
Age



Average

All	48
Switched	47
DNT	51
NS/NAC	47

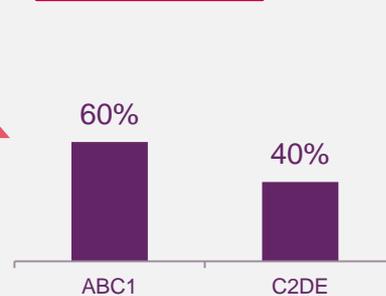
Employment status



All working

All	58
Switched	63
DNT	58
NS/NAC	53

Social grade



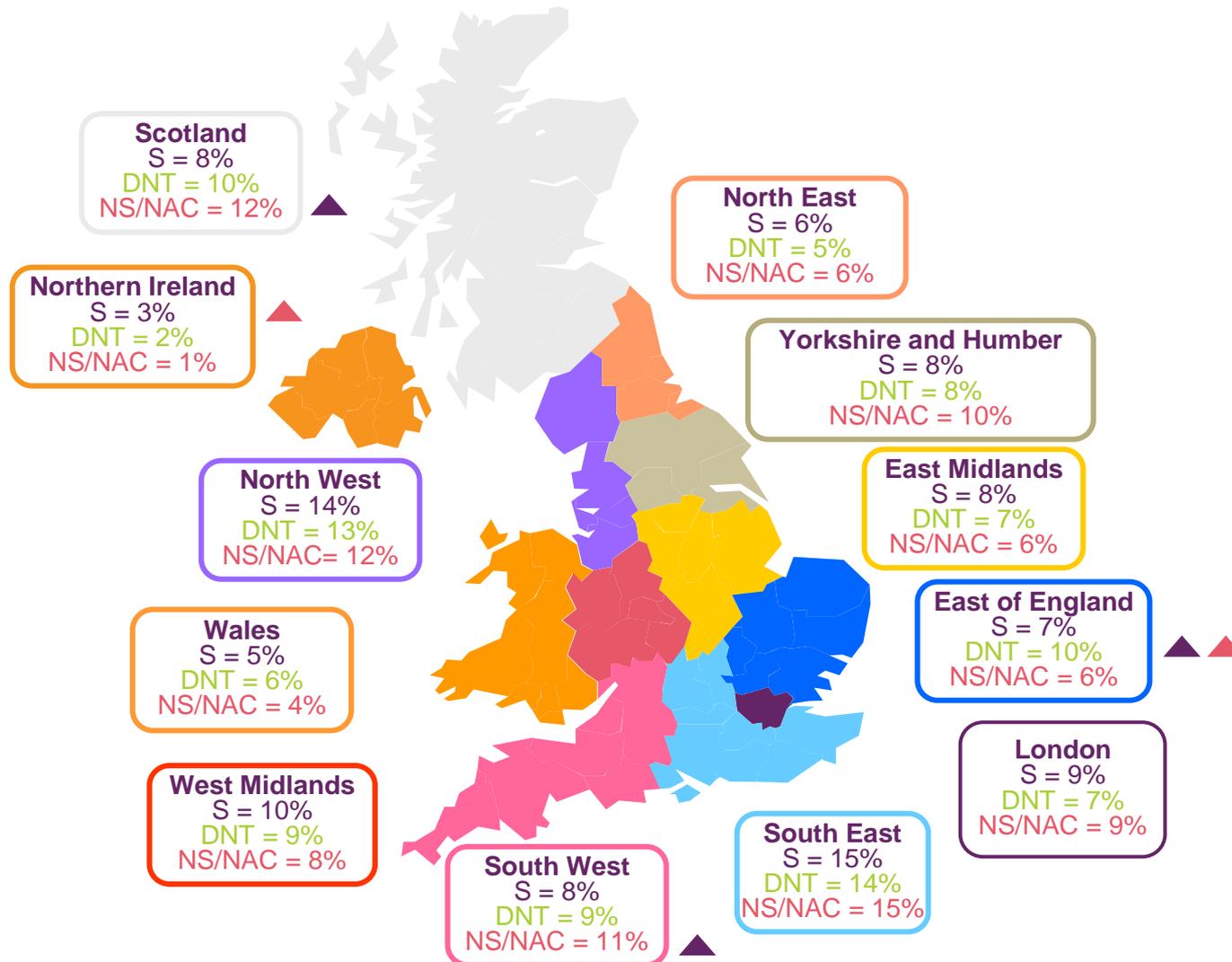
ABC1 C2DE

All	60	40
Switched	61	39
DNT	65	35
NS/NAC	54	46

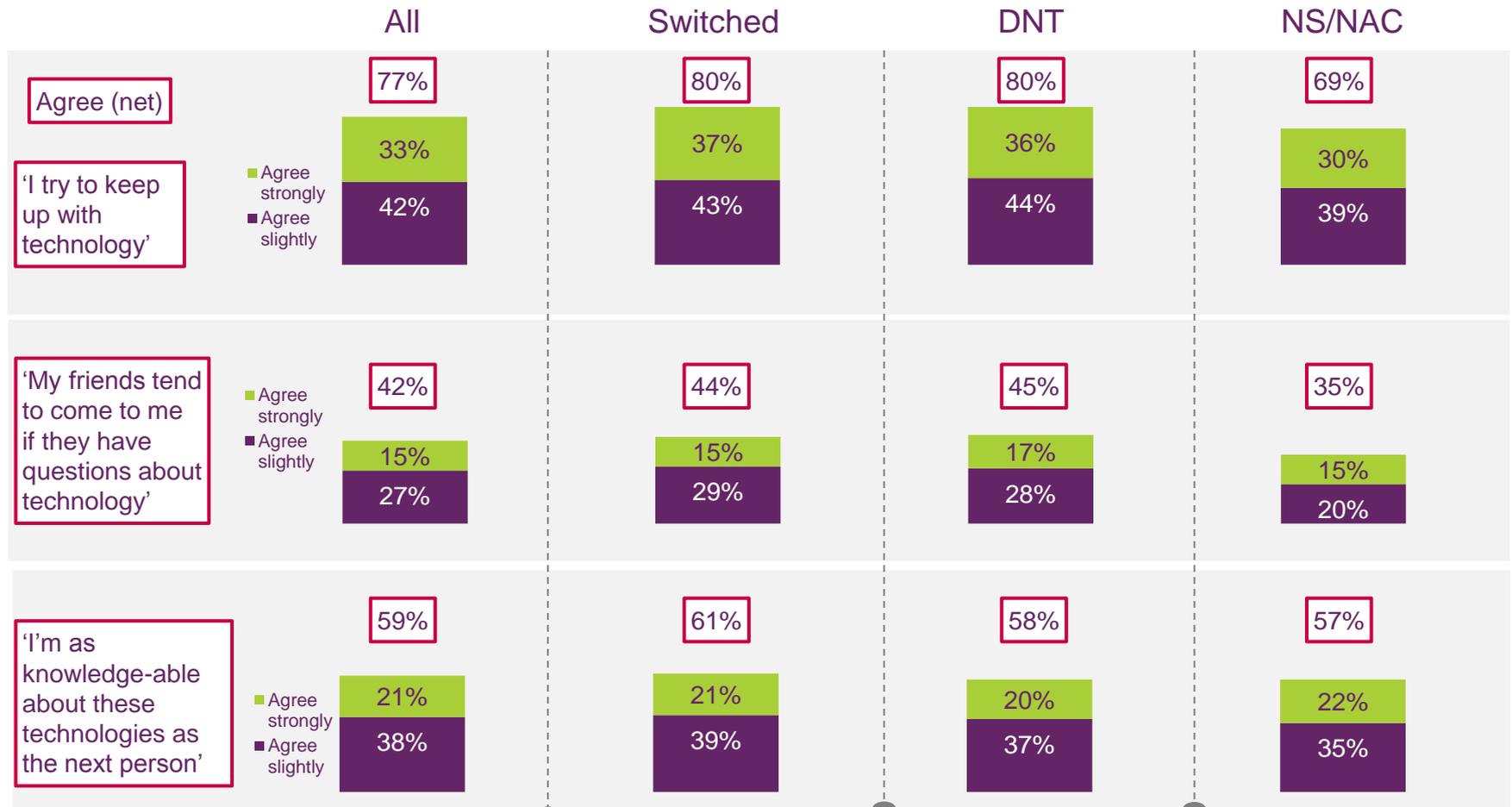
QA2/3/4/5

Base: All respondents (2529) / Total Switchers (1132) / DNT(699)/NS/NAC (698)

Geographic profile of key sample groups



Attitudes to technology



QA7: Before we ask you more about the TV, phone and broadband services you use, please look at the different statements people have made about technology services such as mobile phones, landline phones, broadband or TV services. For each statement please indicate how much you agree or disagree...

Base: All respondents (2529) / Total Switchers (1132) / DNT(699)/NS/NAC (698)