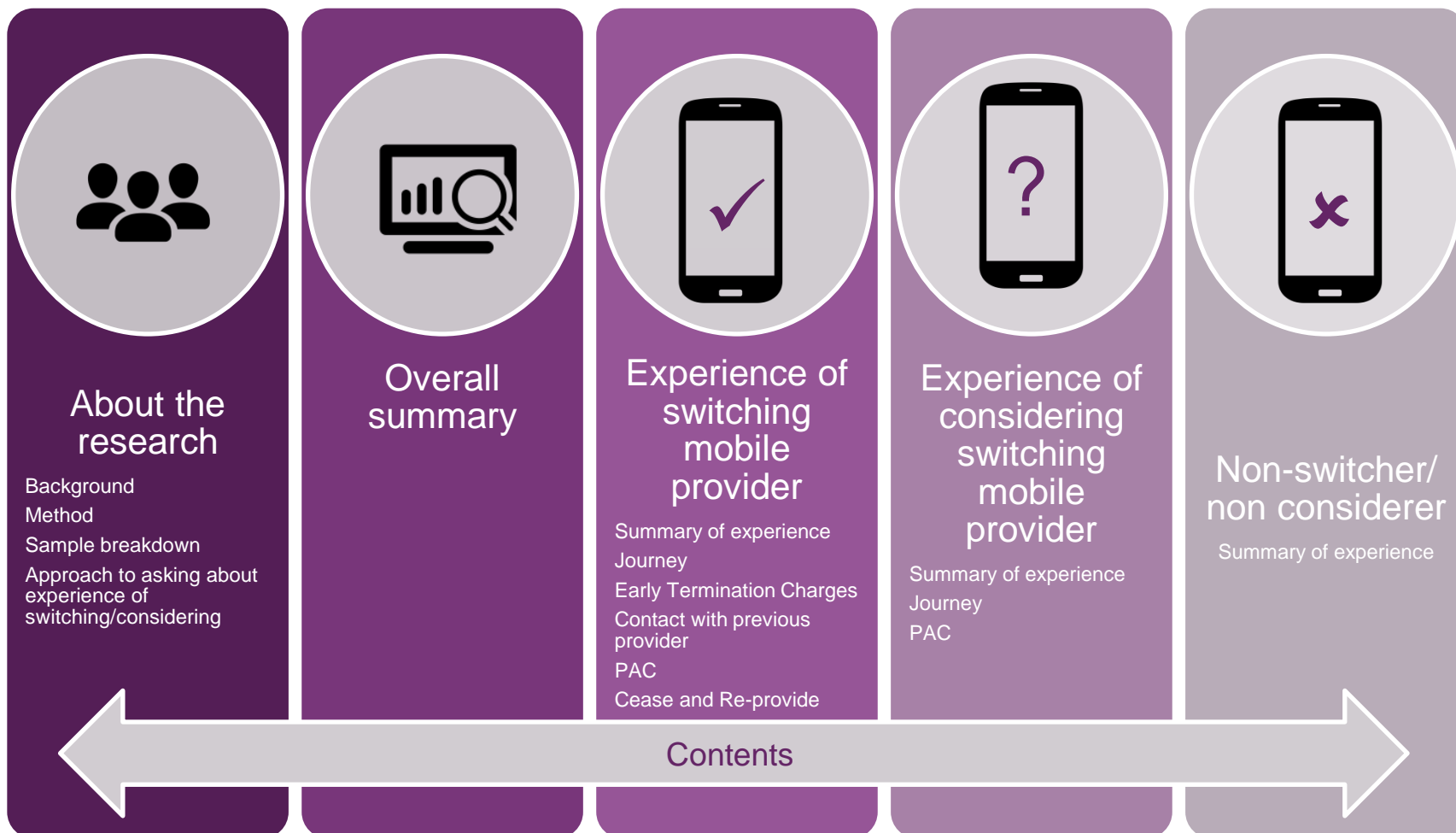


# OFCOM MOBILE SWITCHING QUANTITATIVE RESEARCH

Published: 12 September 2016



# Background to the mobile switching quantitative research

Ofcom's **statutory duties** under the Communications Act 2003 are:

- to further the interests of citizens in relation to communications matters;
- and to further the interests of consumers in relevant markets, where appropriate by promoting competition



In order for consumers to benefit from competition, they must be able to switch between products and services **without undue effort, disruption and anxiety**

Evidence from Ofcom's switching tracker suggests that in retrospect most switchers spontaneously state it is easy to switch. However, **when prompted, around half in each market say they have experienced difficulties.**

This quantitative research has been undertaken in order to specifically assess the **consumer experience when switching mobile network provider**

Data was collected and analysed by BDRC-Continental, an independent research agency

# Research method

## Data collection



- The survey was conducted among an online panel sample
- Online research allowed a cost effective and efficient means to reach the audience Ofcom wished to consult
- Fieldwork took place from 20<sup>th</sup> August to 1<sup>st</sup> September 2015
- The overall sample size is 6,762 interviews

## Sample



- The overall sample profile achieved was nationally representative of mobile decision makers in terms of both demographic and key attitudinal measures (see 'analysis' for more detail)
- The sample was divided into different groups in terms of their mobile switching behaviour for the purposes of analysis. (More on the composition of these groups can be found on the following slide)
- Quotas were set in order to ensure that a minimum number of interviews per cell was achieved for the purposes of analysis

## Analysis



- Even when quotas are imposed to ensure a nationally representative spread, online samples can sometimes be biased towards particular types of individuals
- The survey was therefore calibrated using data collected from a nationally representative face to face omnibus survey
- This weighting has also ensured the correct incidence of the different sample groups within the overall sample, adjusting the 'over sampling' of some groups carried out to ensure that a robust number of interviews was achieved for the purposes of analysis

## Approach to asking about experience of switching/remaining with existing provider

- Switchers were presented with a series of potential difficulties that they may have faced when switching and Considerers with potential factors that may have played a role in their decision to stay with their current provider
- Some difficulties/factors would only have been relevant to respondents that had undertaken specific activities. Therefore prior to being asked about the difficulties/factors, Switchers and Considerers were asked about specific experiences they may have had and their responses were used to route them through to the relevant statements
- For each (that they had experienced, either as reported by the respondent, or as a necessary step in the journey) switchers/considerers were asked to say whether it was a major or minor difficulty/factor or not a difficulty/factor at all. If they indicated they had more than one major difficulty/factor, then they were asked to say which was the main one. If only one major difficulty/factor was selected, then this was automatically coded as 'main'
- Non-switcher/non-considerers were asked about a similar series of factors in the same manner as Switchers and Considerers, however as they had neither switched nor gone through the process of considering, they were not routed based on having undertaken specific activities

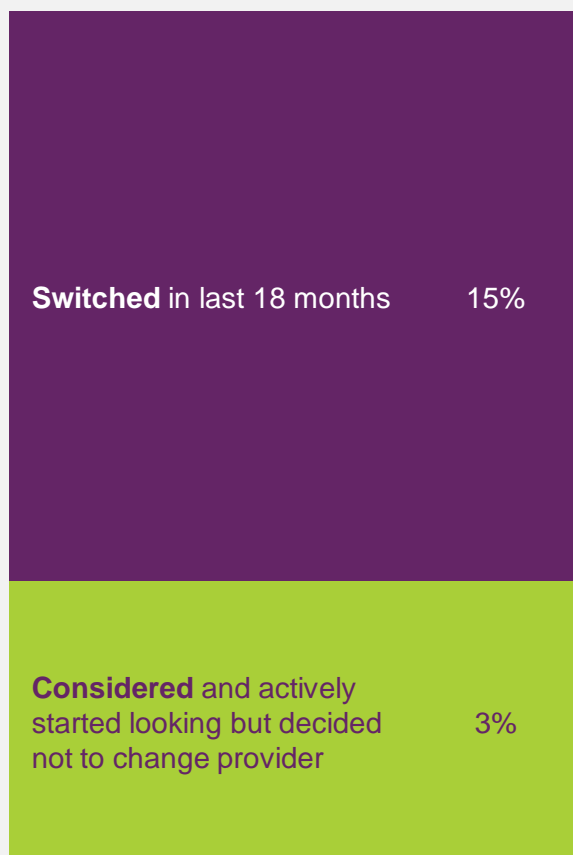


## Detailed sample breakdown (1 of 2)

Group and size in overall sample:	Name of group in report	Description of group
<b>Switched</b> in last 18 months 15%	'Switched'	<p>There are several different groups within the overall 'switched' sample depending on the type of provision they were using (i.e. PAYG/ Contract/ SIM) and switched to, and whether they kept their number (PAC) or changed it (C&amp;R). <b>This is detailed on the following slide.</b></p>
<b>Considered</b> and actively started looking but decided not to change provider in the last 12 months 3%	'Considered'	<p>There are <b>two main groups</b> within the overall 'considered' sample depending on whether they intended on keeping their number or were unsure/ wanted something else</p>
<b>Currently</b> considering switching 15%	'Current considerer'	<p>Views of this group are <u>not explored</u> in this research. They are in the process of switching so cannot comment on the entire procedure. They have also not decided not to switch and are therefore not 'considered' or either of the non-switcher/non-considerer groups.</p>
Considered but did not start looking and <b>decided not to change provider</b> 16%	'Non-switcher/non-considerer'	<p>This group did not proceed far enough down the route of switching 'consideration'</p>
<b>Not considered</b> changing mobile network provider in the last 12 months 52%	'Non-switcher/non-considerer'	<p>This group did not consider switching or switch provider</p>

## Detailed sample breakdown (2 of 2)

### Group and size in overall sample:



### Composition of sample group:

Switchers within pre-pay (PAC)	7%
Switchers to/within full contract (total)	85%
Switchers to/within SIM only (total)	8%
Switchers via PAC	67%
Switchers via C&R	33%
Switchers to/within full contract (PAC)	54%
Switchers to/within full contract (C&R)	31%
Switchers to/within SIM only (PAC)	5%
Switchers to/within SIM only (C&R)	2%

Key groups  
for analysis

Split by package  
type

Split by switch  
method

Split by switch  
method and  
package type

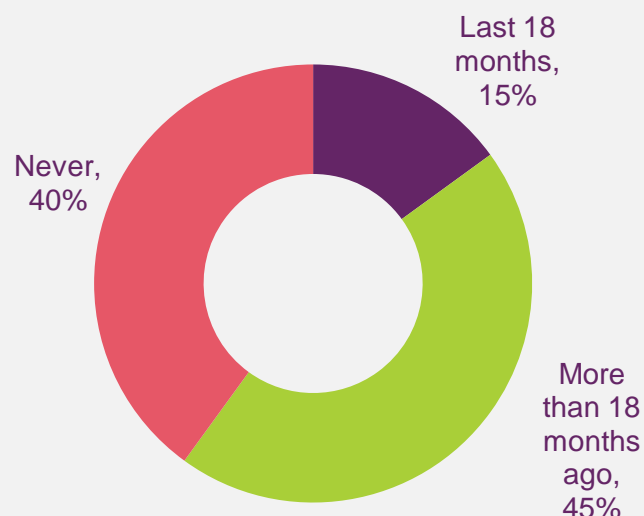
Considerers (wanted to keep number)	75%
Considerers (intended to <u>not</u> keep number)	4%
Considerers (undecided)	21%
Considerers (unaware could keep number)	0%

Split by wanted to  
keep number or  
other/undecided

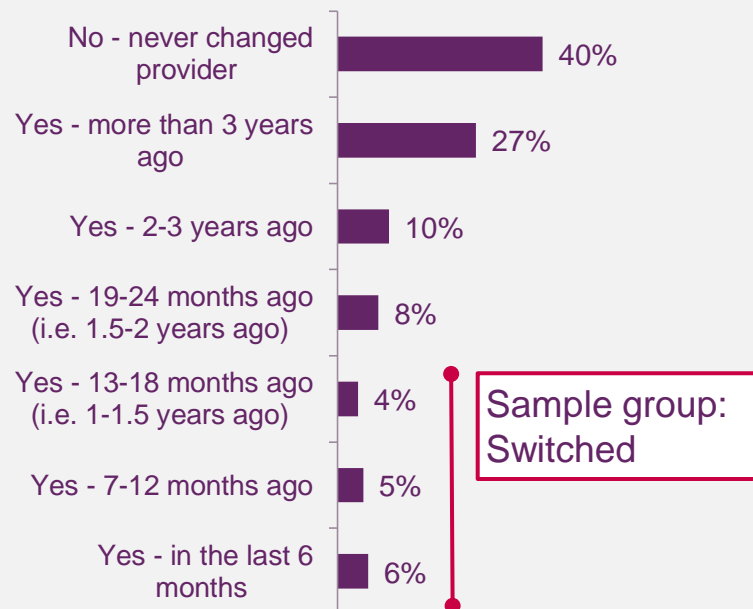
# Incidence of switching mobile phone network provider

Three in five claim to have switched provider, one in seven in the last 18 months

## Headline



## Detail



QA7 Have you ever changed your mobile phone network provider? If yes, when did you most recently change mobile phone network?

Base: All respondents: 6762



# Overall Summary



## Summary: switched providers in the past 18 months

### Who they are

- A switch of mobile provider was made by three in five of the sample, although those making a switch in the past 18 months accounted for 15%
  - This was split by: 6% in the past 6 months, 5% in the last 7-12 months and 4% in 13 or more months
- Switching via PAC was more prevalent than via C&R (10% vs. 5%), and the single largest group comprised PAC switches to/ within those with full contracts (8%)
- Compared to the overall consumer sample, those switching mobile provider in the past 18 months were more confident with technology, e.g. 52% agreed that 'my friends tend to come to me if they have questions about technology', compared to 34% for the total sample



## Summary: switched providers in the past 18 months

### Their journey

- A majority of consumers that switched made a comparison between providers (80%); a similar proportion found out what they needed to do in order to switch
- For three in five (57%), once they had decided to switch (i.e. they had selected an alternative mobile provider), the first point of contact was their new provider, more than double the proportion that contacted their previous provider first (24%)
- Notice was most commonly given at the end of, or after the end of the minimum contract, but a quarter (27%) gave their notice before the end of this period
- A fifth said they experienced a temporary loss of service. This was more common for those switching via PAC (22%) than C&R (14%)
  - A quarter (26%) of those switching via PAC were given a temporary number; and 8% said they experienced both a temporary number and a loss of service
- Early termination charges were paid by 37% of those who had given notice before the end of their minimum period
  - In around half of cases these charges were less than £50, and for a fifth they were less than £20
  - In a fifth of cases these charges were paid by those with less than a week left on their contract
- The most popular means of obtaining a PAC was via the phone, and four in five found the process of obtaining the PAC to be 'easy'
- In total, 32% of switchers experienced a contract overlap
  - For 59% of these, this was unwanted i.e. 19% experienced an unwanted contract overlap
- A third of the sample did not port their number
  - C&R switchers said 'didn't want to keep number' (47%), 'ideally wanted to keep their number' (14%), or 'would have liked to have kept it, but was not really bothered' (32%).



## Summary: switched providers in the past 18 months

### Contact with providers

- A quarter (25%) were contacted by their previous provider during the switching process. In half the cases this was to 'offer me a better deal/ talk about renewal offers', and for 28% 'to tell me about their services'
  - Calls to provide a PAC (21%) and 'to tell me about charges I needed to pay for ending my contract early (21%) were less frequently cited
- Contact with the previous provider was cited as 'helpful' for a third (32%), but other common descriptors were 'time consuming' (28%) and 'frustrating' (24%)
  - Those switching via C&R were less likely than PAC switchers to describe contact with previous providers 'helpful' (24% vs. 36%)
- A third found contacting their previous provider to difficult (11% major/ 23% minor)
  - Reasons given were that 'they kept me too long on the phone' (44%), 'they tried to persuade me to stay with them' (40%), and 'it was difficult getting through to my provider to cancel' (40%)



## Summary: switched providers in the past 18 months

### Overall experience

- Almost four in five (78%) found the process of switching to be 'easy' and this was consistent between the different switcher groups
- Satisfaction with the decision to switch, stood at 87%. Again, this was consistent between the different switcher groups
- Three in five (62%) did not mention any 'major' difficulties. Those that did (38%), named three on average, with mentions ranging from 3% to 11% for the activities measured/prompted
- In terms of overall difficulty ('major' or 'minor')
  - 'Cancelling your previous service', 'getting the information you needed from your previous provider', 'understanding the relevant steps required to switch provider', 'keeping your phone number', 'contacting your old provider', and 'finding time to research the markets' were all named as 'major' or 'minor' difficulties by a third or more
  - However, among those that experienced particular aspects, having 'a provider trying to persuade you to stay', 'moving content from one cloud storage to another' and 'paying the charge to exit the contract early' were 'major' or 'minor' difficulties for almost half of these switchers
- The experience of obtaining a PAC was positive for **most** of those who requested it.
  - However, for those who found the experience difficult, the most mentioned reasons for this related to the time involved.





## Summary: switched providers in the past 18 months

### PAC vs. C&R

- The incidence of experiencing the two types of switching process among switchers was 67% PAC, 33% C&R
  - Half of C&R claimed they did not want to keep their number (although responses suggested in some instances this was not motivated through a benefit to them but a perception of difficulty around keeping their number)
    - C&R switchers were more likely to find ‘keeping your phone number’ a major difficulty (14%) than PAC switchers (8%)
- C&R were more likely to be ‘very satisfied’ with their decision to switch (58% vs. 44% PAC), but not any more likely to find the process ‘easy’ (‘very’ or ‘fairly’) (78% vs. 80%)
- C&R switchers were less likely to go to their previous provider as their first point of contact once they had decided to switch (19% vs. 27%), and when they did this it was more likely to be to cancel than to obtain a PAC code
- C&R switchers were less likely to experience a loss of service (14% vs. 22% PAC), but more likely to have an overlap of contracts (40% vs. 28%)
  - However, for nearly half (48%) of C&R switchers with contract overlap this was a choice to prioritise getting the handset they wanted as soon as possible (32% of C&R with overlap) or get a deal with a new provider before it ran out (28% of C&R with overlap), significantly higher than PAC with overlap
- Attitudes towards contact with previous providers was less positive in some respects for C&R switchers, fewer said it was ‘helpful’ (24% vs. 36%), and a higher proportion ‘frustrating’ (29% vs. 21%)
- Among the C&R sample, the most mentioned ‘main’ difficulty i.e.. ‘keeping your phone number’ (9%) was more than twice that of the next most mentioned ‘main’ difficulty and was significantly higher than mentions among the PAC sample (3%)





## Summary: consumers who ‘considered’ switching

### Who they are

- It was a minority of the sample (5%) who considered switching providers in the past 12 months but decided not to
- More were currently considering switching provider (19%), however the views of these consumers have not been included because they did not have a complete view of the consideration or switching journey
- Those who considered switching were more likely to be male than those who had switched provider. They were also slightly more likely to be social grades ABC1
- Their attitudes towards technology were similar to those who have switched and were more confident about technology than the overall sample, e.g. 76% agreed that they ‘try and keep up with technology’ vs. 61% of the total sample
- However, they were less likely to have switched provider for services in other markets
  - just over half had done so for the services asked about, compared to two thirds for those who had switched mobile provider



## Summary: consumers who ‘considered’ switching

The journey that those who ‘considered’ switching took

- Almost all (91%) who considered switching had taken some action related to it. For 45% this involved ‘looking online at potential new provider’s website’
- Those who considered switching and wanted to keep their number were slightly more likely to have contacted their provider regarding the switch (73% vs. 66%)
- When thinking about switching, in most cases those that contacted their current provider had looked at alternative providers (53%), and 13% had made a decision but not signed up (13%)
- Experiences of contacting providers: 11% said ‘difficulty in contacting their current provider’ was a ‘major’ factor in remaining with them, and a further 19% a ‘minor’ factor
  - Taking too long to get through was the single biggest reason for this difficulty (37%)
  - Almost matched by the 32% who said they had difficulty with ‘provider tried to convince me to stay with them’
- A quarter (23%) were contacted by their current provider. The largest reason for this was to be offered a deal (63% of those contacted), followed by ‘to tell me about their services’ (32%).
- More than two fifths (46%) of those who called to obtain a PAC were offered a deal/ discount on their existing package



## Summary: consumers who ‘considered’ switching

### Overall experience

- Most consumers who considered but did not switch were satisfied with their decision to stay with their current provider (85%)
- The main factors contributing to the decision not to switch were ‘current provider is still the best deal/ cheapest’ (20% ‘main’ reason), and ‘I negotiated/ accepted a deal with my current provider’ (12% ‘main’ reason)
  - ‘I prefer to stay with trusted/ known provider’, coupled with ‘there wasn’t enough difference in cost to be worth switching’ were also commonly cited reasons for not switching (83% and 78% ‘major’/‘minor’ factor) although few in comparison mentioned either as ‘main’ reasons (5% for each)
- Bad experiences switching in other markets generally (33%) or the mobile market specifically (29%) were factors for a minority and were almost always not the ‘main’ reason for not switching.
  - difficulties obtaining the PAC was a factor for a minority (25%) and did not figure as the ‘main’ factor in not switching



## Summary: 'Non-switcher/non-considerer' consumers

### Who they are

- Non-switcher/non-considerer consumers accounted for around two-thirds (68%) of mobile phone users in our sample and most of these had not considered switching provider in any way in the last 12 months (52%). There was also a group of consumers who had considered switching but that had not started looking (16%) who are classed with this group because they did not go far enough through the switching process to have truly considered making a provider switch
- 'Non-switcher/non-considerer' consumers were almost as likely to be using PAYG (41%) as they were a handset and monthly contract (44%), with a minority (14%) SIM only

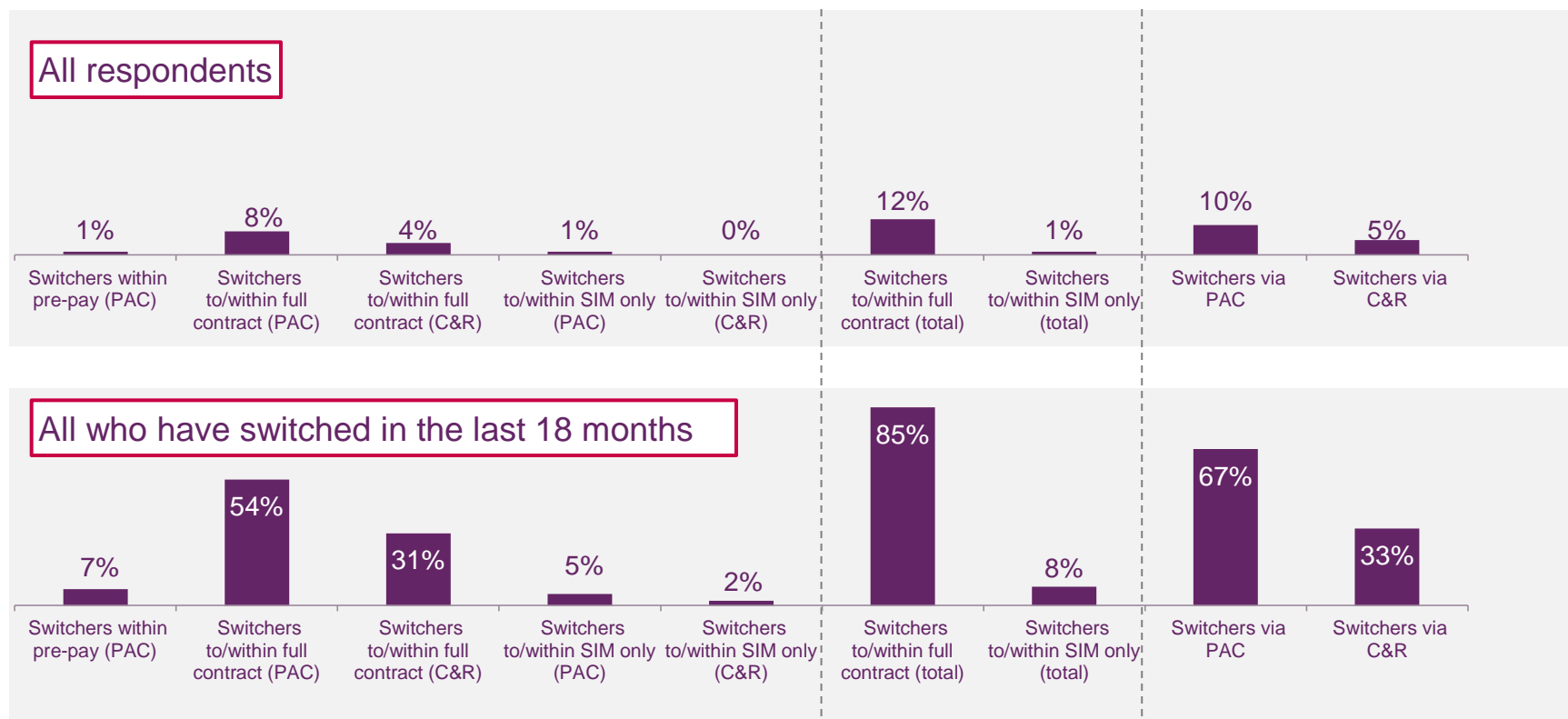
### Why they are non-switcher/non-considerers

- 'Prefer to stay with trusted/ known provider' and 'current provider is still the best deal/ cheapest' were the most commonly chosen 'main factors' in remaining with the existing provider and not considering a switch (15% and 17% respectively)
- Other relatively high scoring factors were 'current provider has the best quality of service, e.g. network coverage' (9% select as 'main' factor), and 'did not want to lose my phone number' (8%, rising to 15% for those with a contract)
- At the other end of the scale, bad experience with other switches, or a perception of 'lack of choice' were cited by fewer than one-in-ten as 'major' reasons in remaining with their current provider

# INCIDENCE IN SAMPLE OF SWITCHING GROUPS



## Description of the sample – types of switch



QA12 When you switched, what type of mobile package did you switch from? / QA6 Which of these best describes the main mobile phone package you personally use and pay for? / QA13 And when you switched did you..?

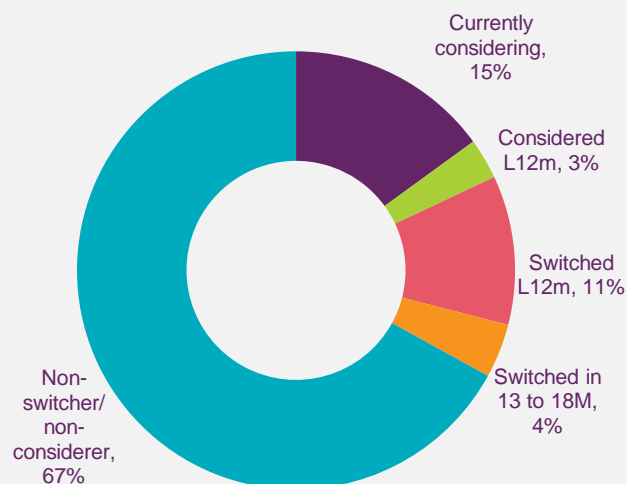
Base: All respondents (6762) / All switched last 18M (1319)



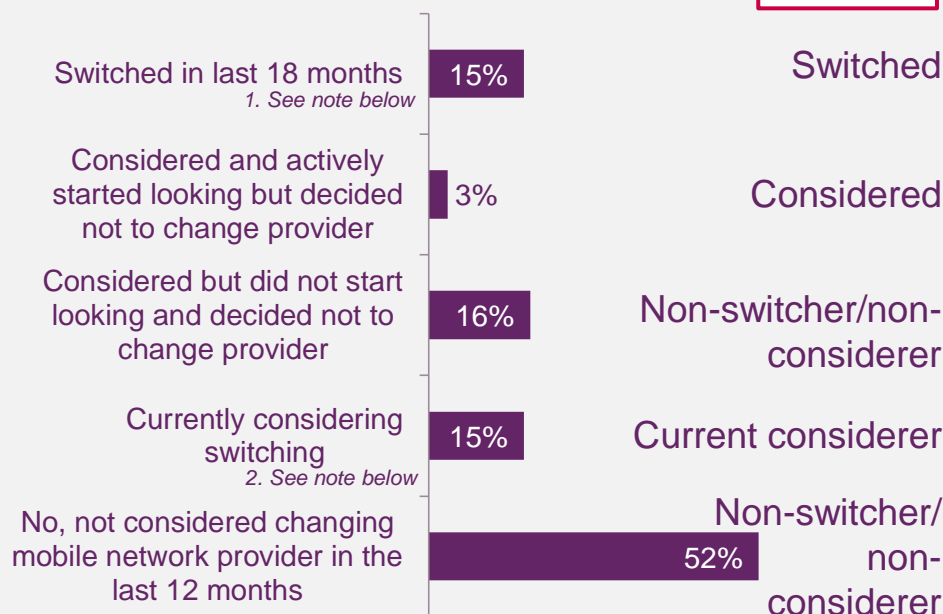
# Consideration of switching mobile phone network provider in the last 12 months

More are currently considering than have considered but dismissed switching in last 12m

## Headline



## Detail



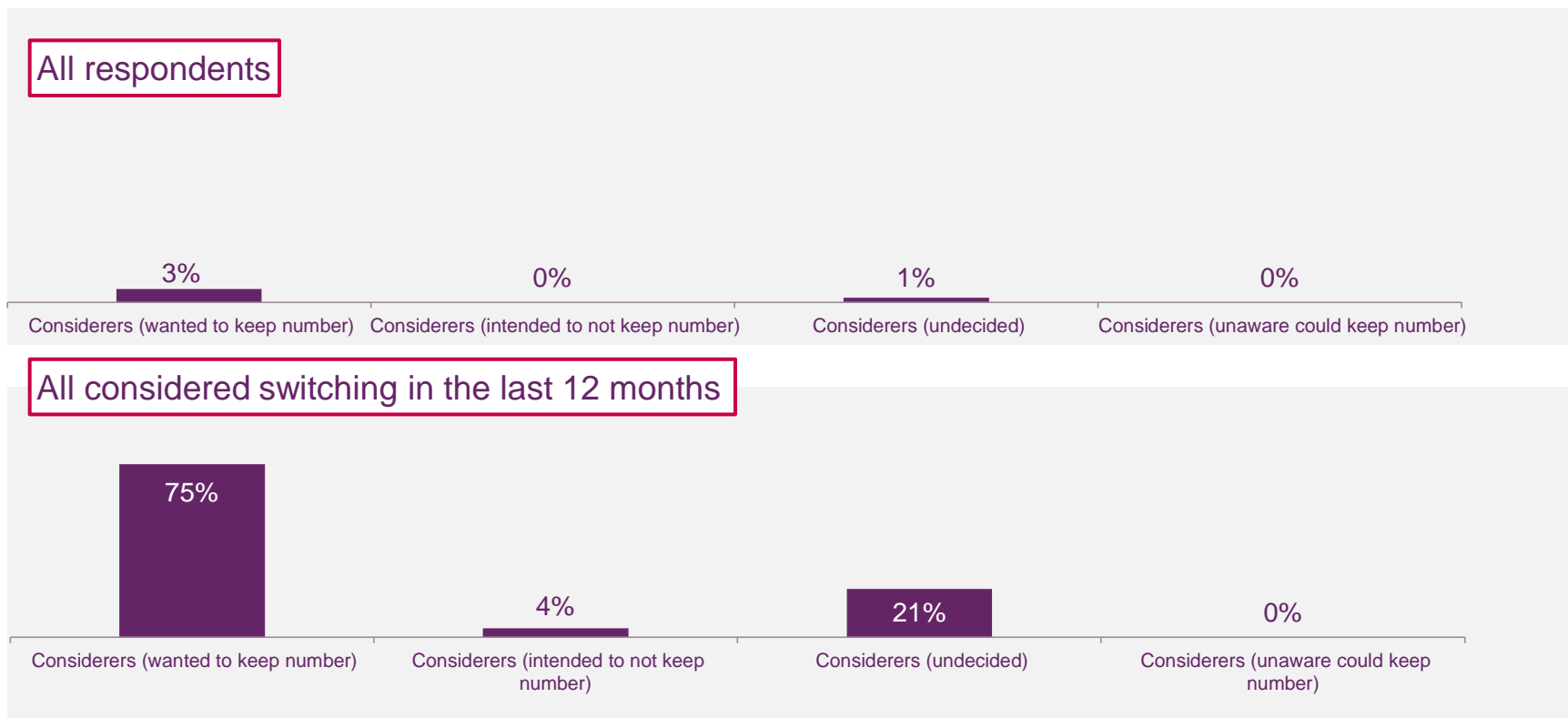
Notes on sample. 1. There will be some overlap between those who switched up to 18 months ago and the other categories. However for the purposes of this research they are in the 'switched' sample group only 2. These respondents have not completed their 'journey' they have not been included as considered or switched sample groups. However they were also not in the 'non-switcher/non-considerer' group

QA8 Which of the following best describes whether you have considered changing mobile network provider in the last 12 months?

Base: All respondents: 6762

## Type of consideration summary

Most who had made a decision were intending on switching via PAC

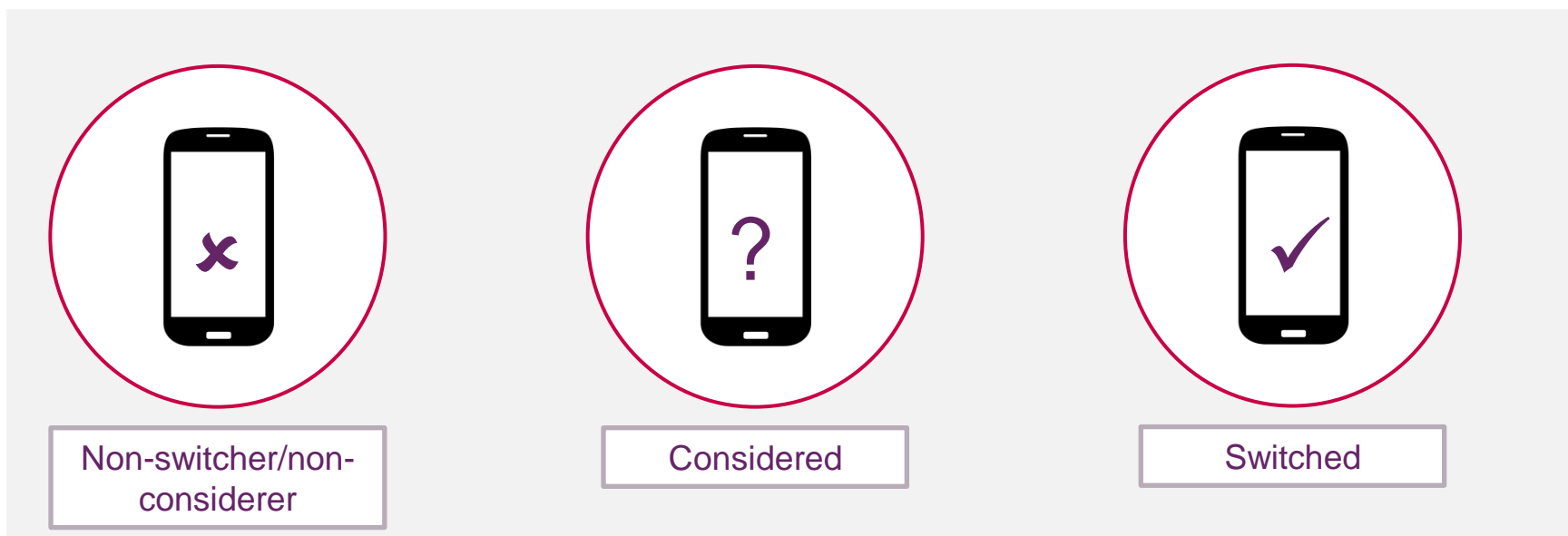


QA11 Which of the following best describes how likely you would have been to keep your phone number if you had switched mobile network?

Base: All respondents (6762), All considered (500)

## Notes for the report...

- Slides frequently showing results for **different sample groups**:
  - In order that that these are **easily distinguishable** the following symbol has been used to indicate which group is the focus of each slide.



This can be found in the top left hand side of the slide.

# EXPERIENCE OF SWITCHING MOBILE PROVIDER



# SWITCHING MOBILE PROVIDER: SUMMARY



## Summary: switched providers in the past 18 months

### Who they are

- A switch of mobile provider was made by three in five of the sample, although those making a switch in the past 18 months accounted for 15%
  - This was split by: 6% in the past 6 months, 5% in the last 7-12 months and 4% in 13 or more months
- Switching via PAC was more prevalent than via C&R (10% vs. 5%), and the single largest group comprised PAC switches to/ within those with full contracts (8%)
- Compared to the overall consumer sample, those switching mobile provider in the past 18 months were more confident with technology, e.g. 52% agreed that 'my friends tend to come to me if they have questions about technology', compared to 34% for the total sample





## Summary: switched providers in the past 18 months

### Their journey

- A majority of consumers that switched made a comparison between providers (80%); a similar proportion found out what they needed to do in order to switch
- For three in five (57%), once they had decided to switch (i.e. they had selected an alternative mobile provider), the first point of contact was their new provider, more than double the proportion that contacted their previous provider first (24%)
- Notice was most commonly given at the end of, or after the end of the minimum contract, but a quarter (27%) gave their notice before the end of this period
- A fifth said they experienced a temporary loss of service. This was more common for those switching via PAC (22%) than C&R (14%)
  - A quarter (26%) of those switching via PAC were given a temporary number; and 8% said they experienced both a temporary number and a loss of service
- Early termination charges were paid by 37% of those who had given notice before the end of their minimum period
  - In around half of cases these charges were less than £50, and for a fifth they were less than £20
  - In a fifth of cases these charges were paid by those with less than a week left on their contract
- The most popular means of obtaining a PAC was via the phone, and four in five found the process of obtaining the PAC to be 'easy'
- In total, 32% of switchers experienced a contract overlap
  - For 59% of these, this was unwanted i.e. 19% experienced an unwanted contract overlap
- A third of the sample did not port their number
  - C&R switchers said 'didn't want to keep number' (47%), 'ideally wanted to keep their number' (14%), or 'would have liked to have kept it, but was not really bothered' (32%).



## Summary: switched providers in the past 18 months

### Contact with providers

- A quarter (25%) were contacted by their previous provider during the switching process. In half the cases this was to 'offer me a better deal/ talk about renewal offers', and for 28% 'to tell me about their services'
  - Calls to provide a PAC (21%) and 'to tell me about charges I needed to pay for ending my contract early (21%) were less frequently cited
- Contact with the previous provider was cited as 'helpful' for a third (32%), but other common descriptors were 'time consuming' (28%) and 'frustrating' (24%)
  - Those switching via C&R were less likely than PAC switchers to describe contact with previous providers 'helpful' (24% vs. 36%)
- A third found contacting their previous provider to difficult (11% major/ 23% minor)
  - Reasons given were that 'they kept me too long on the phone' (44%), 'they tried to persuade me to stay with them' (40%), and 'it was difficult getting through to my provider to cancel' (40%)



## Summary: switched providers in the past 18 months

### Overall experience

- Almost four in five (78%) found the process of switching to be 'easy' and this was consistent between the different switcher groups
- Satisfaction with the decision to switch, stood at 87%. Again, this was consistent between the different switcher groups
- Three in five (62%) did not mention any 'major' difficulties. Those that did (38%), named three on average, with mentions ranging from 3% to 11% for the activities measured/prompted
- In terms of overall difficulty ('major' or 'minor')
  - 'Cancelling your previous service', 'getting the information you needed from your previous provider', 'understanding the relevant steps required to switch provider', 'keeping your phone number', 'contacting your old provider', and 'finding time to research the markets' were all named as 'major' or 'minor' difficulties by a third or more
  - However, among those that experienced particular aspects, having 'a provider trying to persuade you to stay', 'moving content from one cloud storage to another' and 'paying the charge to exit the contract early' were 'major' or 'minor' difficulties for almost half of these switchers
- The experience of obtaining a PAC was positive for **most** of those who requested it.
  - However, for those who found the experience difficult, the most mentioned reasons for this related to the time involved.



## Summary: switched providers in the past 18 months

### PAC vs. C&R

- The incidence of experiencing the two types of switching process among switchers was 67% PAC, 33% C&R
  - Half of C&R claimed they did not want to keep their number (although responses suggested in some instances this was not motivated through a benefit to them but a perception of difficulty around keeping their number)
    - C&R switchers were more likely to find ‘keeping your phone number’ a major difficulty (14%) than PAC switchers (8%)
- C&R were more likely to be ‘very satisfied’ with their decision to switch (58% vs. 44% PAC), but not any more likely to find the process ‘easy’ (‘very’ or ‘fairly’) (78% vs. 80%)
- C&R switchers were less likely to go to their previous provider as their first point of contact once they had decided to switch (19% vs. 27%), and when they did this it was more likely to be to cancel than to obtain a PAC code
- C&R switchers were less likely to experience a loss of service (14% vs. 22% PAC), but more likely to have an overlap of contracts (40% vs. 28%)
  - However, for nearly half (48%) of C&R switchers with contract overlap this was a choice to prioritise getting the handset they wanted as soon as possible (32% of C&R with overlap) or get a deal with a new provider before it ran out (28% of C&R with overlap), significantly higher than PAC with overlap
- Attitudes towards contact with previous providers was less positive in some respects for C&R switchers, fewer said it was ‘helpful’ (24% vs. 36%), and a higher proportion ‘frustrating’ (29% vs. 21%)
- Among the C&R sample, the most mentioned ‘main’ difficulty i.e.. ‘keeping your phone number’ (9%) was more than twice that of the next most mentioned ‘main’ difficulty and was significantly higher than mentions among the PAC sample (3%)

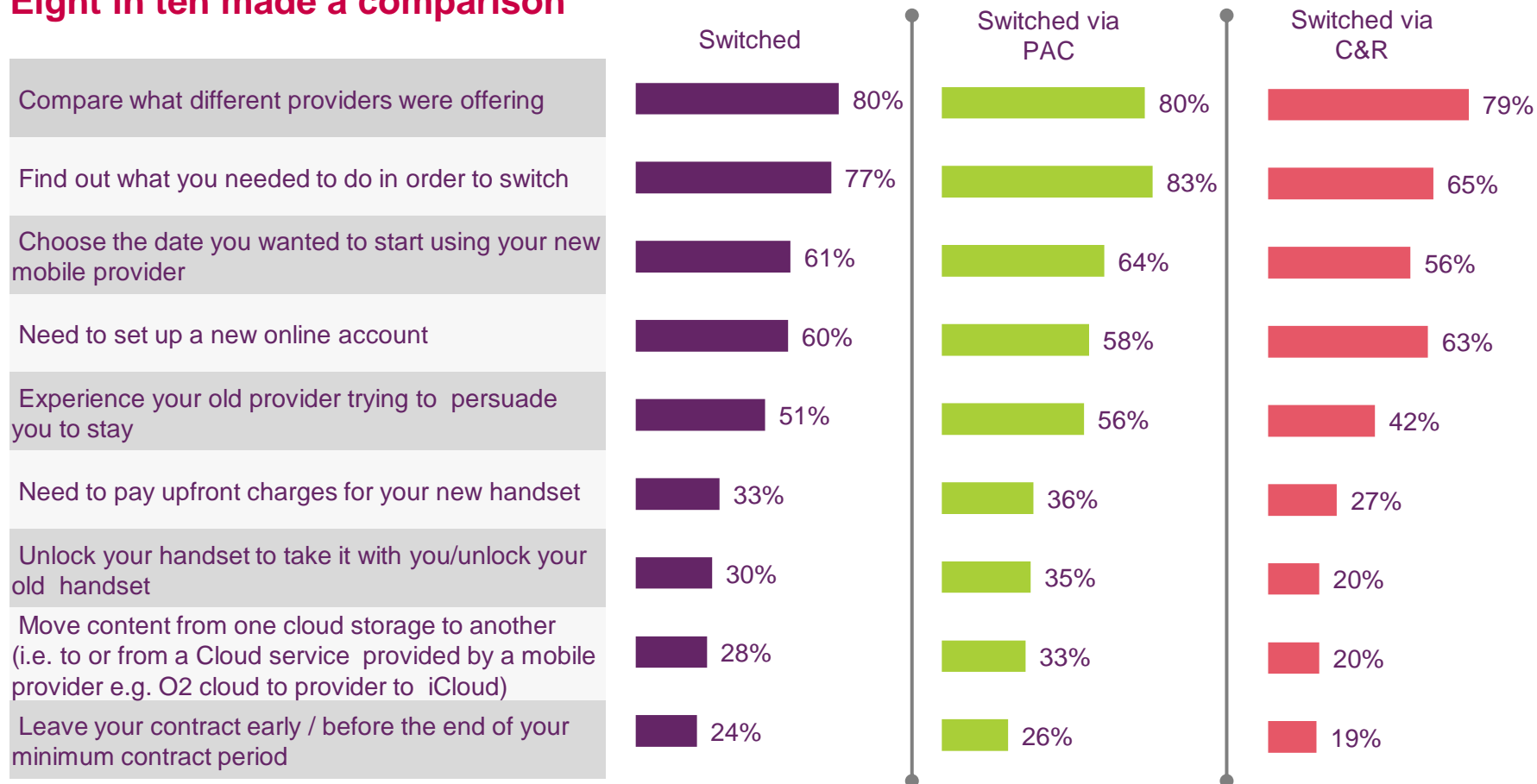


# **SWITCHING MOBILE PROVIDER: SUMMARY OF EXPERIENCE**



## Activities undertaken by *those that have switched*

### Eight in ten made a comparison



QA14 When you last changed mobile provider, did you...?

Tables ordered on switched

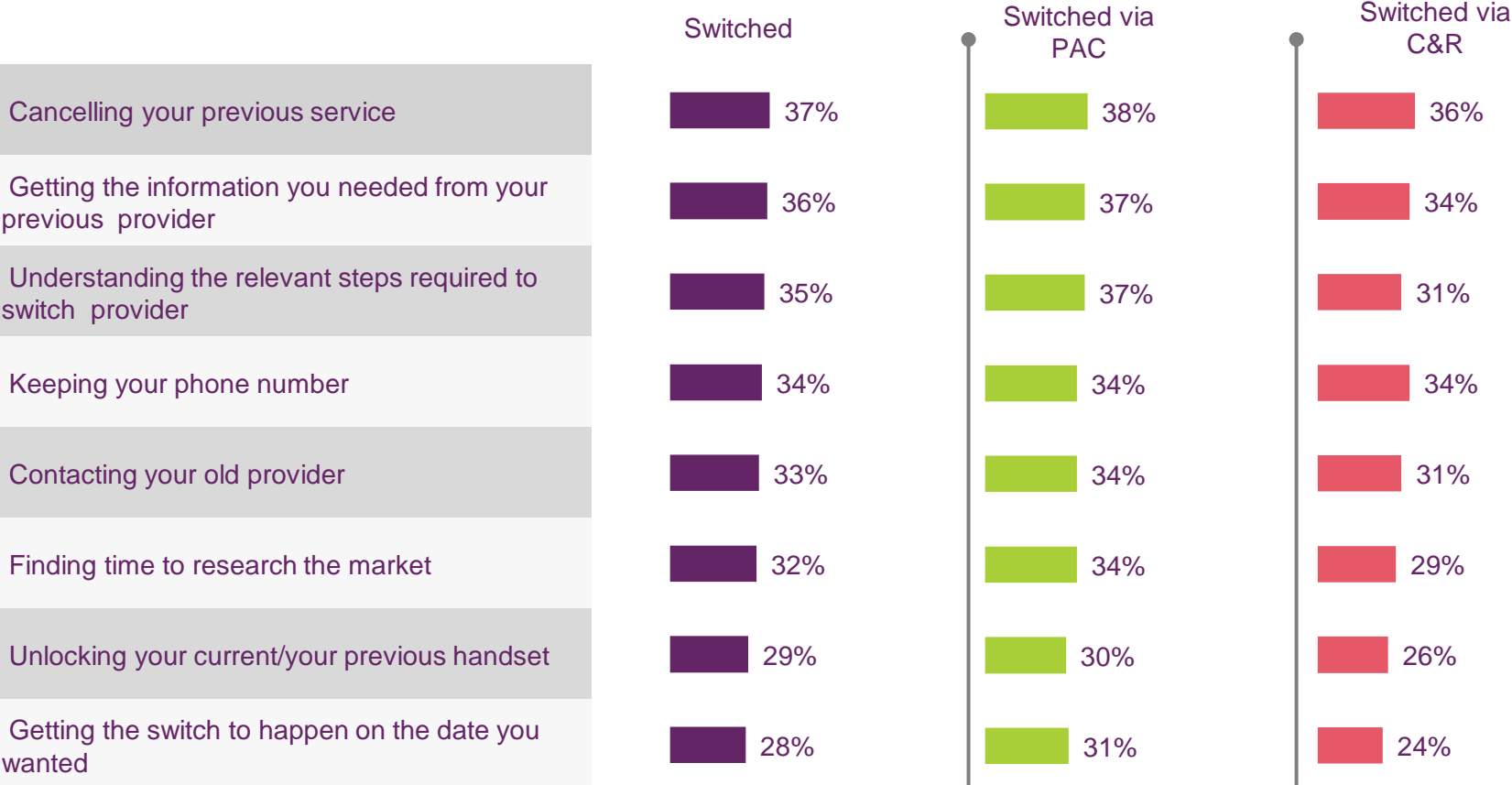
Base: All switched in last 18m (1306), All switched via PAC in last 18m (705), All switched via C&R in last 18m (601)

The approach to asking about experience of switching/remaining with existing provider is discussed in detail in 'About the research'





Those reporting ANY difficulty (Major/ Minor) with each activity (1 of 2)  
**Almost two in five found cancelling their previous service to be a difficulty**



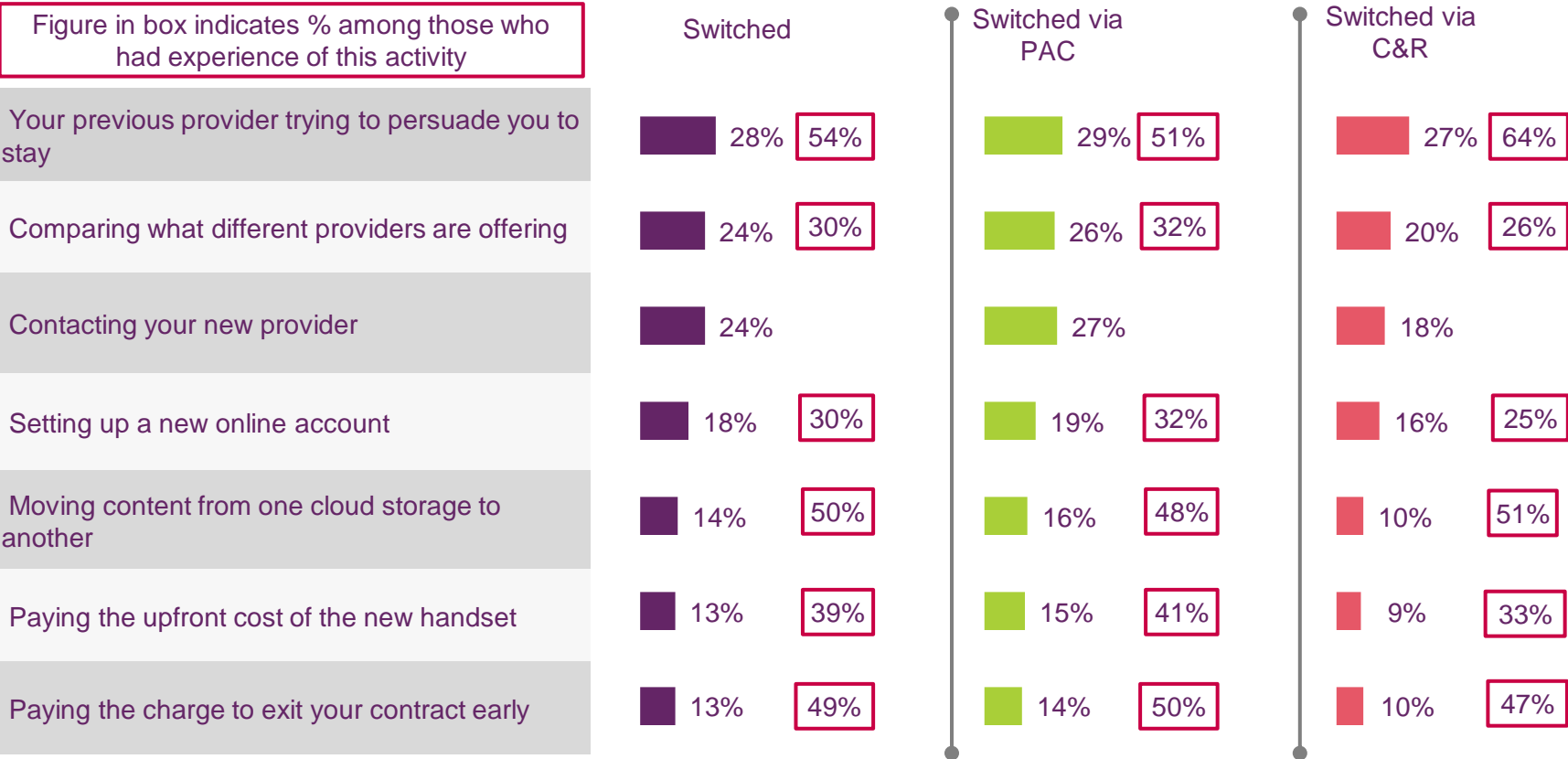
QA15A And which, if any, of these did you experience difficulty with...?  
Tables ordered on switched  
Base: All switched in last 18m (1306), All switched via PAC in last 18m (705), All switched via C&R in last 18m (601)

The approach to asking about experience of switching/remaining with existing provider is discussed in detail in 'About the research'



# Those reporting ANY difficulty (Major/ Minor) with each activity (2 of 2)

Half of those who moved cloud content found this to ‘be difficult’



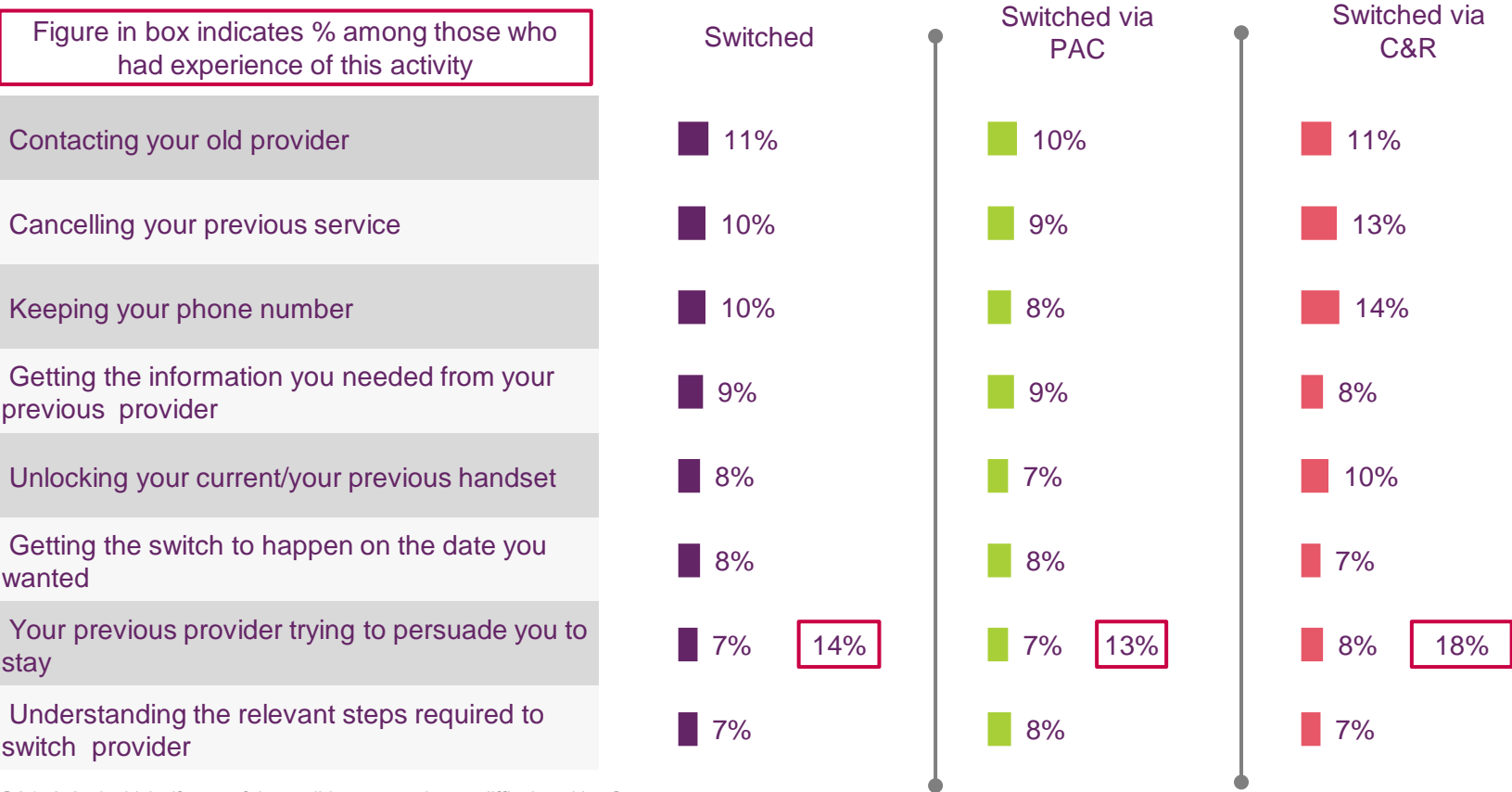
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The approach to asking about experience of switching/remaining with existing provider is discussed in detail in 'About the research'



# Those reporting a MAJOR difficulty with each activity (1 of 2)

## Keeping phone number was a 'major' difficulty for one in seven C&R switchers

Figure in box indicates % among those who had experience of this activity



QA15A And which, if any, of these did you experience difficulty with...?  
Tables ordered on switched  
Base: All switched in last 18m (1306), All switched via PAC in last 18m (705), All switched via C&R in last 18m (601)

The approach to asking about experience of switching/remaining with existing provider is discussed in detail in 'About the research'

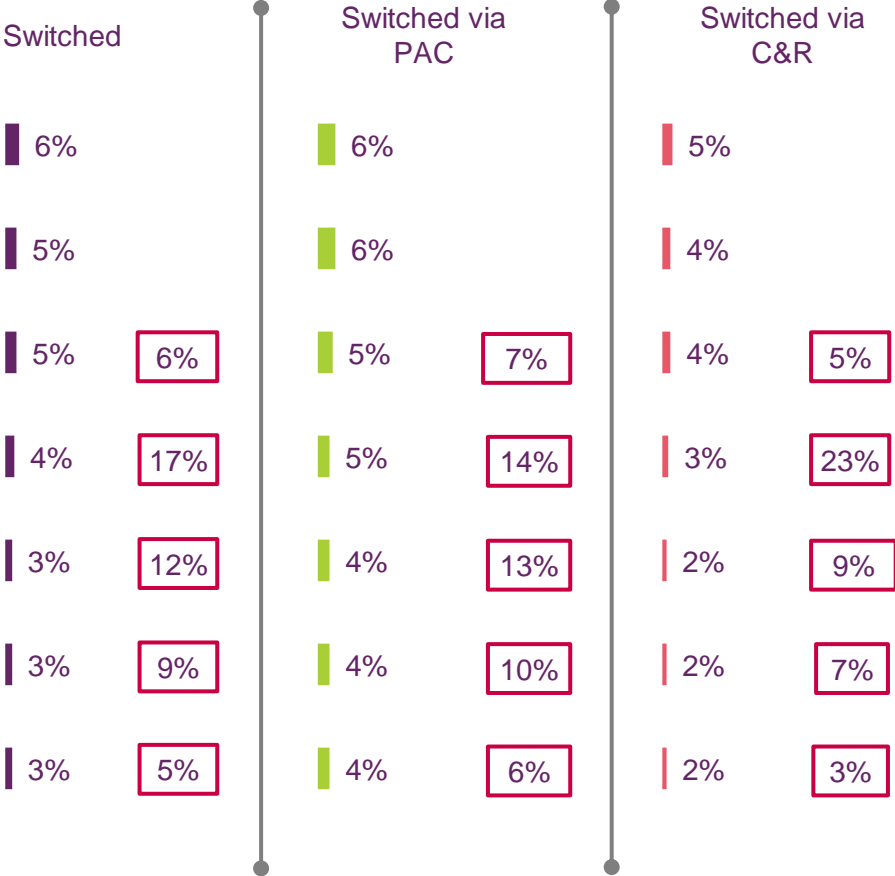


# Those reporting a MAJOR difficulty with each activity (2 of 2)

## Setting up a new online account was not a major difficulty for most of those who experienced it

Figure in box indicates % among those who had experience of this activity

Finding time to research the market
Contacting your new provider
Comparing what different providers are offering
Paying the charge to exit your contract early
Moving content from one cloud storage to another (i.e. to or from a Cloud service provided by a mobile provider e.g. O2)
Paying the upfront cost of the new handset
Setting up a new online account



QA15A And which, if any, of these did you experience difficulty with...?  
Tables ordered on switched  
Base: All switched in last 18m (1306), All switched via PAC in last 18m (705), All switched via C&R in last 18m (601)

The approach to asking about experience of switching/remaining with existing provider is discussed in detail in 'About the research'

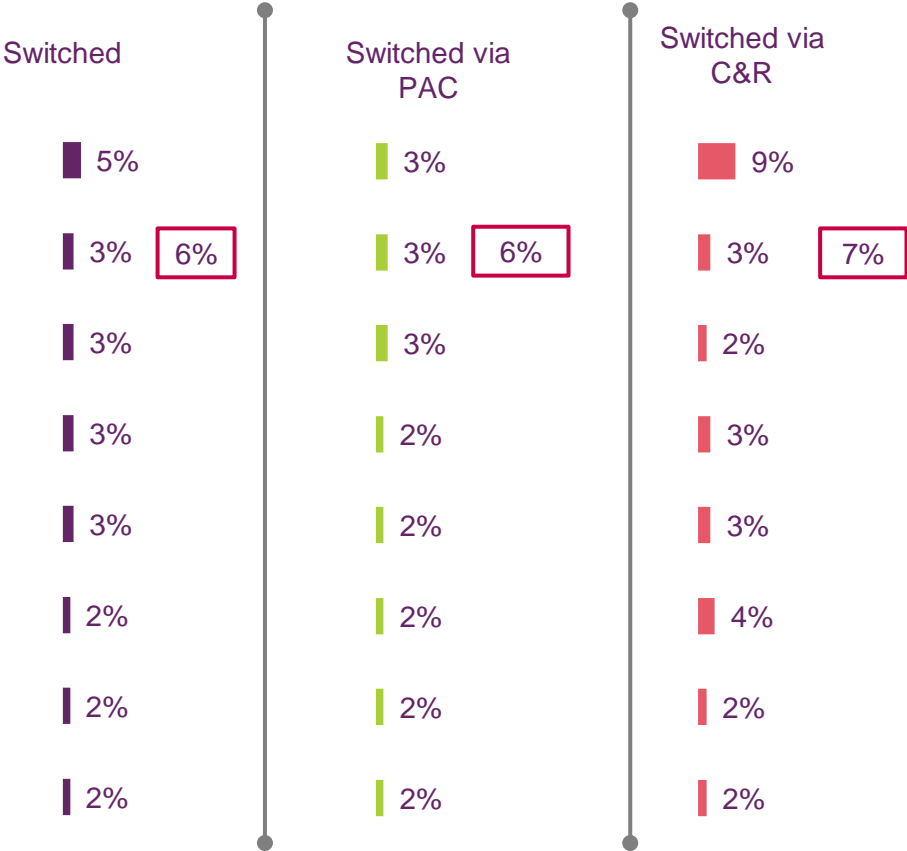


# Those reporting a MAIN difficulty (1 of 2)

There were a variety of different ‘main’ difficulties. For C&R, keeping their phone number (and ultimately not doing so) was the main difficulty experienced

Figure in box indicates % among those who had experience of this activity

Keeping your phone number
Your previous provider trying to persuade you to stay
Getting the switch to happen on the date you wanted
Cancelling your previous service
Contacting your old provider
Unlocking your current/your previous handset
Getting the information you needed from your previous provider
Finding time to research the market



NB: 62% of those who had switched had no MAJOR difficulties and hence no MAIN difficulty

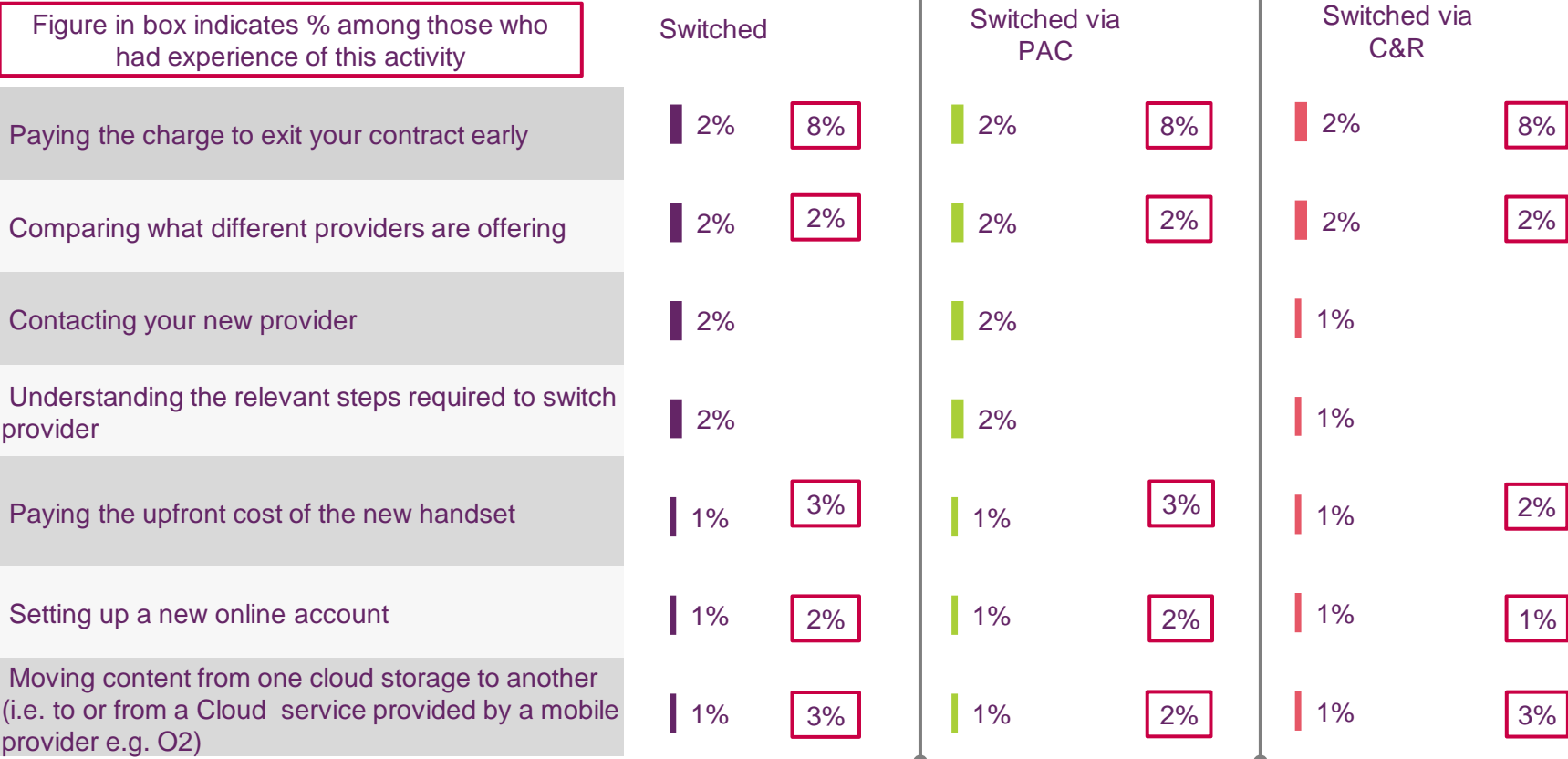
QA15A And which, if any, of these did you experience difficulty with...?  
Tables ordered on switched  
Base: All switched in last 18m (1306), All switched via PAC in last 18m (705), All switched via C&R in last 18m (601)

The approach to asking about experience of switching/remaining with existing provider is discussed in detail in ‘About the research’





# Those reporting a MAIN difficulty (2 of 2)



NB: 62% of those who had switched had no MAJOR difficulties and hence no MAIN difficulty

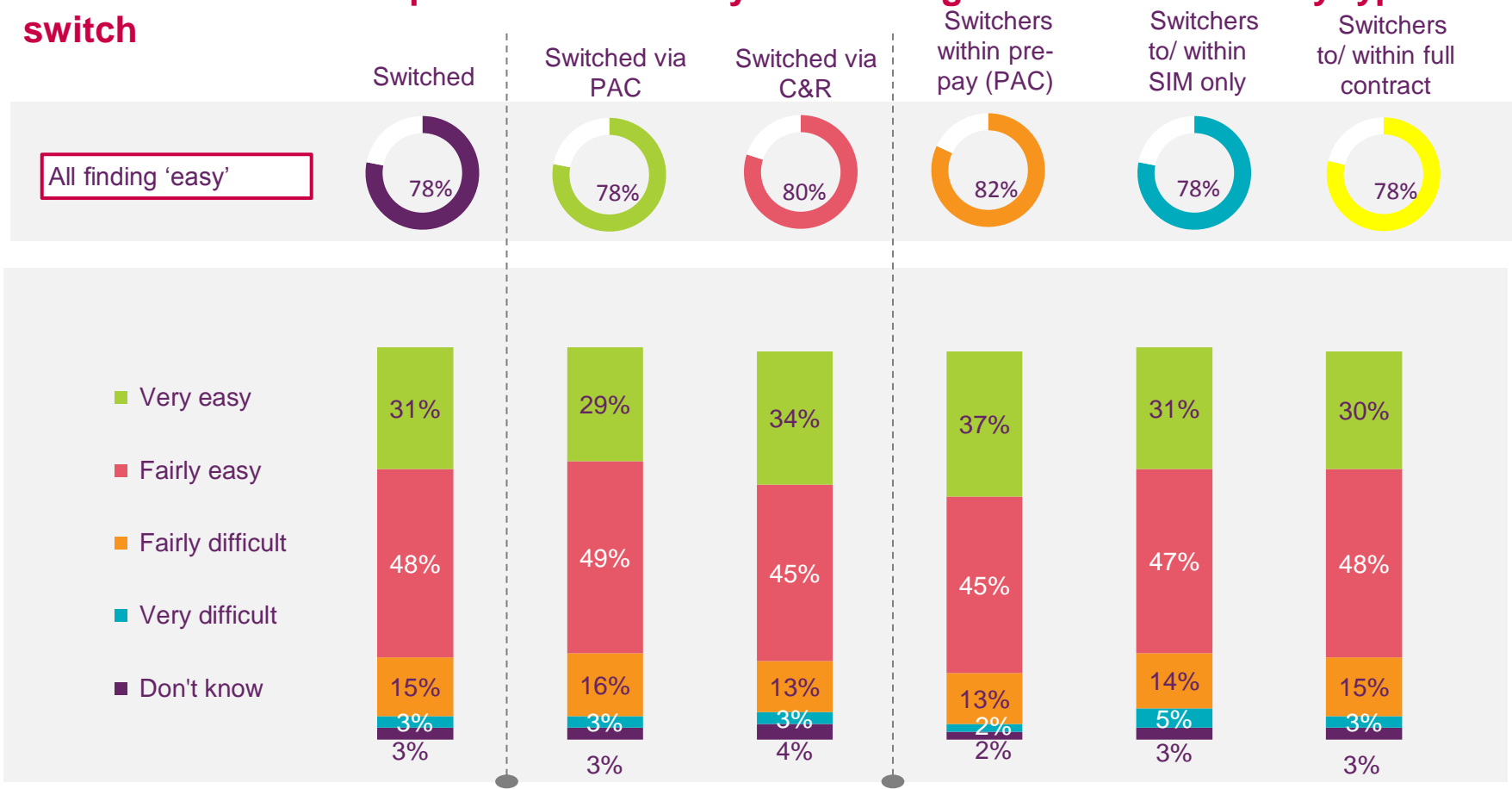
QA15A And which, if any, of these did you experience difficulty with...?  
Tables ordered on switched  
Base: All switched in last 18m (1306), All switched via PAC in last 18m (705), All switched via C&R in last 18m (601)

The approach to asking about experience of switching/remaining with existing provider is discussed in detail in 'About the research'



## Ease of switching

Four in five found the process to be 'easy' with no significant difference by type of switch

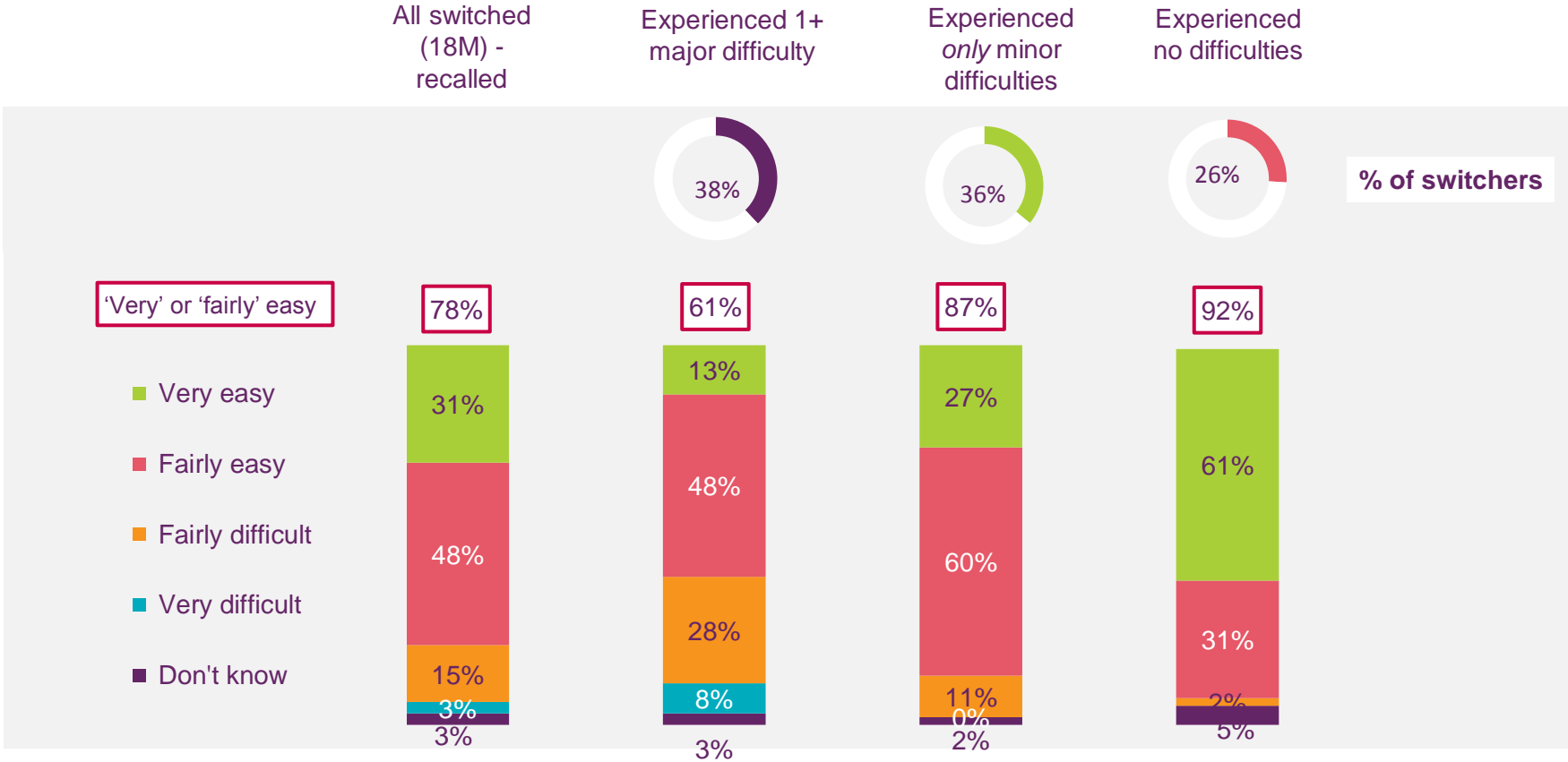


QE6 How would you rate your overall switching experience, i.e. from the point at which you decided you wanted to switch to the point you were using your new provider's service?  
Base: All switched in last 18m (1306), All switched via PAC in last 18m (705), All switched via C&R in last 18m (601)/ All within Pre-pay (101), All to/ within SIM only (201), All to/ within full contract (1004)



# Ease of switching, and experience of difficulties

Stated ease of switching was lower among those who experienced difficulties

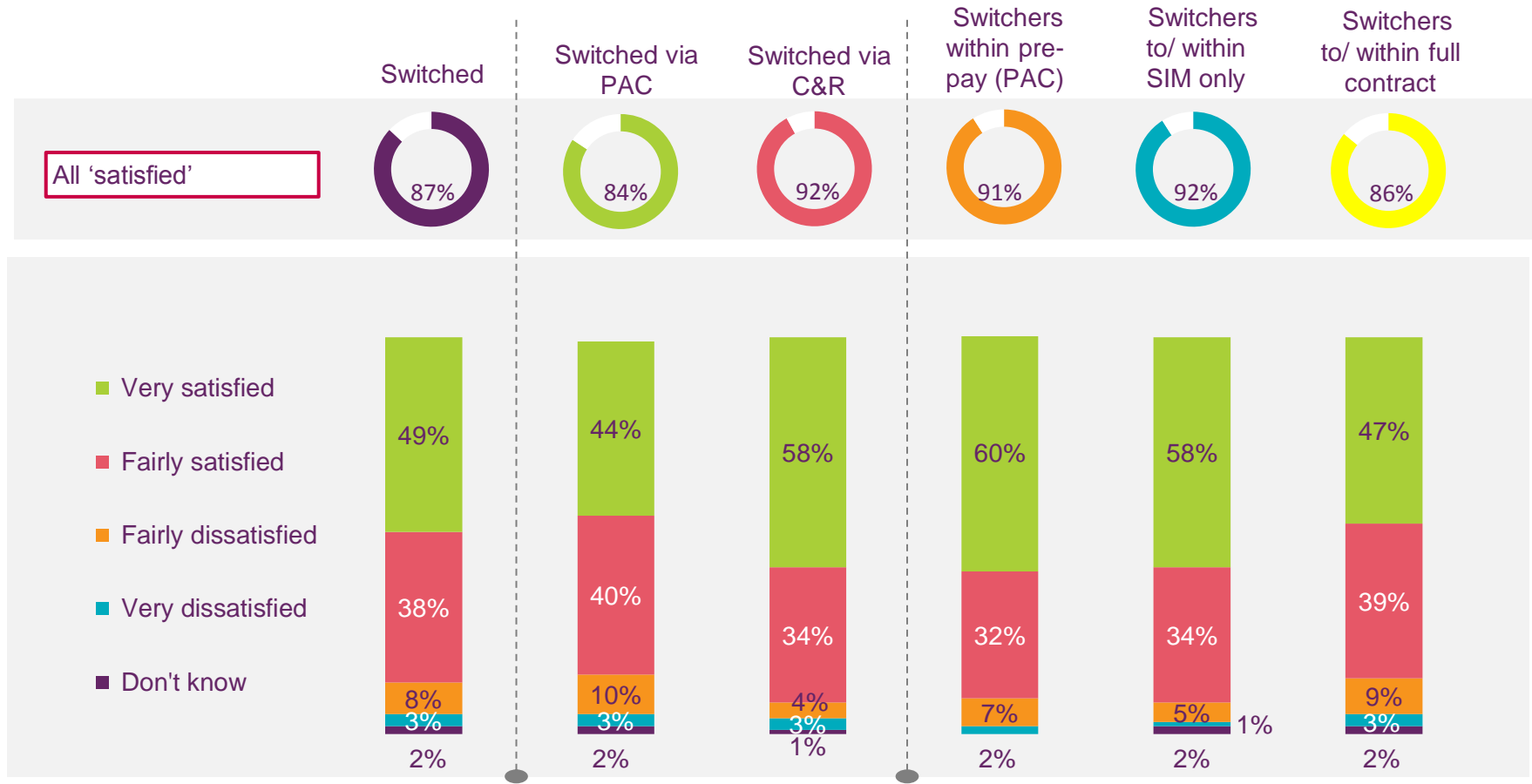


QE6 How would you rate your overall switching experience, i.e. from the point at which you decided you wanted to switch to the point you were using your new provider's service?  
Base: All switched in last 18m (1306), Switched and experienced at least 1 major difficulty (487), switched and experienced a minor but no major difficulty (466), switched and did not report a major or a minor difficulty (353)  
Base: All switched in the last 24 months (428)



## Satisfaction with decision to switch to a new provider

Nine in ten are satisfied with their decision to switch



QE7 Overall, how satisfied are you with your decision to switch to a new provider>?

Base: All switched in last 18m (1306), All switched via PAC in last 18m (705), All switched via C&R in last 18m (601)/ All within Pre-pay (101), All to/ within SIM only (201), All to/within full contract (1004)

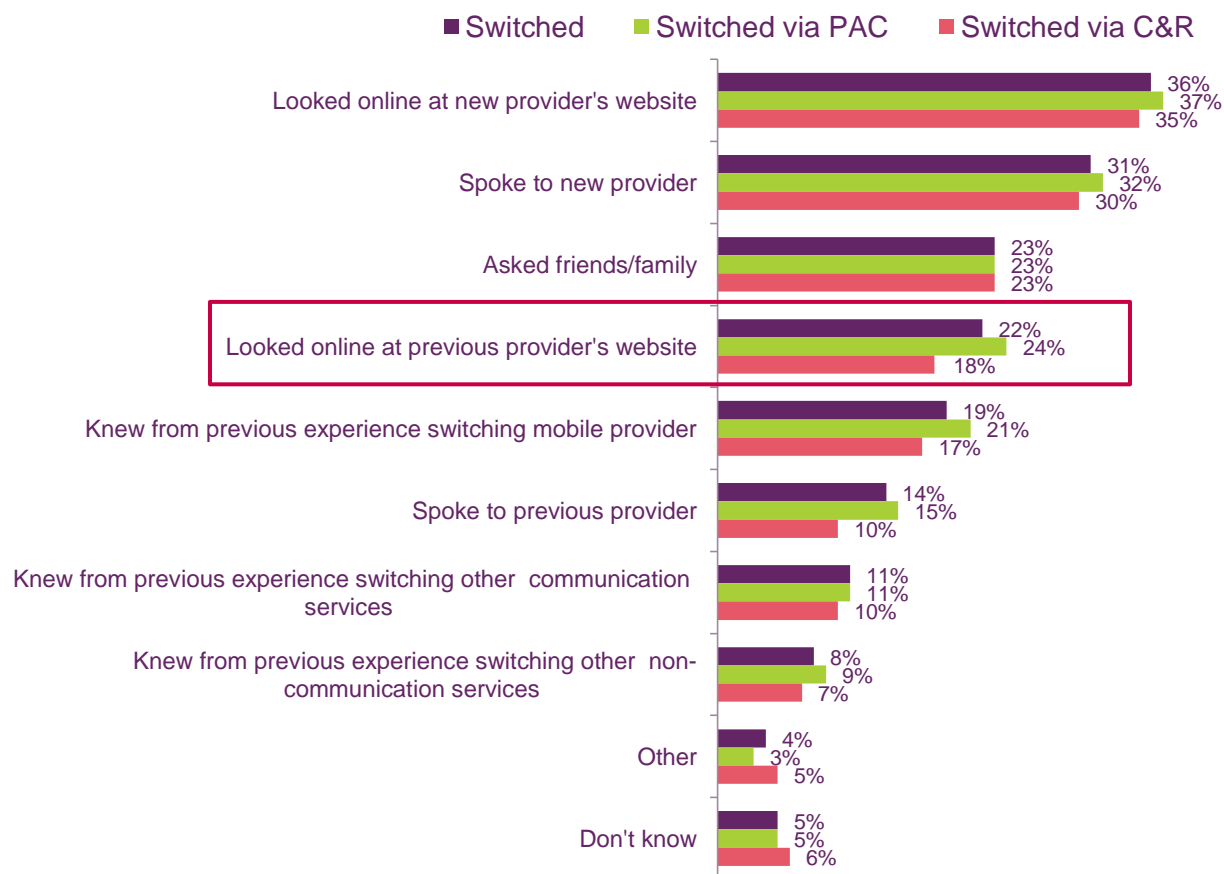
# SWITCHING MOBILE PROVIDER: JOURNEY





## How found out what needed to do to switch

Looking online or speaking directly to a new provider were the most common means of finding out how to switch provider



QB6 How did you find out what you needed to do in order to switch?

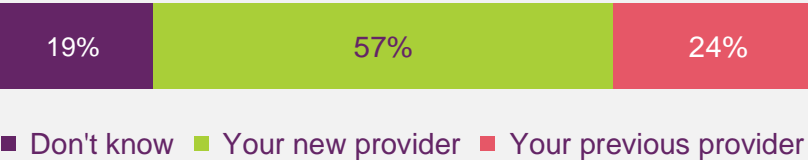
Base: All switched in last 18m (1306) / All switched via PAC in last 18m (705) / All switched via C&R in last 18m (601)



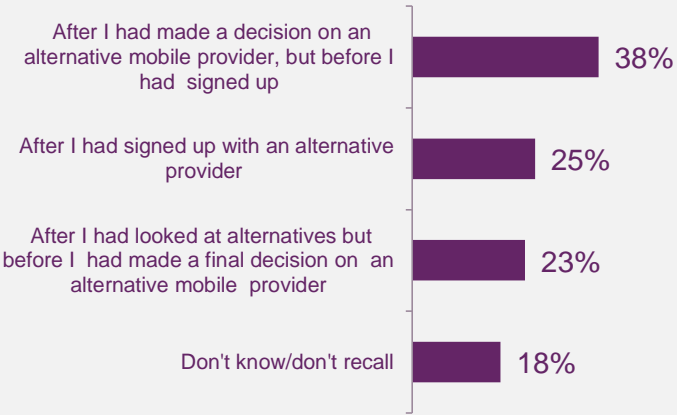
# Contact process and reasons for contact

## Top reasons for contacting *previous provider* were to give notice or obtain PAC

### First point of contact on deciding to switch



### When made contact with previous provider



Reasons for contacting previous mobile provider before switched	All switched
To cancel my service/give notice	28%
To obtain a code to give to my new provider (PAC)	27%
To check how much my final bill would be	18%
To find out when my contract ended	17%
To arrange the 'stop date' in order to avoid paying both providers at the same time	17%
To find out if I needed to give them a notice period to leave	15%
To arrange the 'stop date' in order to avoid a break in service	15%
To find out what I needed to do to change provider	15%
<i>To negotiate a better deal with my current provider</i>	12%
To find out about any charges for ending my contract early	11%
<i>To talk about their products and services</i>	9%
<i>To obtain information about my contract e.g. my usage patterns/spend</i>	7%
Other	3%
Don't know/don't recall	15%

QD1 Once you had decided to switch i.e. you had selected an alternative mobile network provider, who did you contact first? QD3 And at what point did you contact your previous mobile provider?/ QD4 And which, if any, of these were reasons you contacted your previous provider before you switched?  
Base: All switched in last 18m (1306) / All switched via PAC in last 18m (705)/ All switched via C&R in last 18m (601)

*Italics=not process related*



# Contact process and reasons for contact (Switched via PAC)

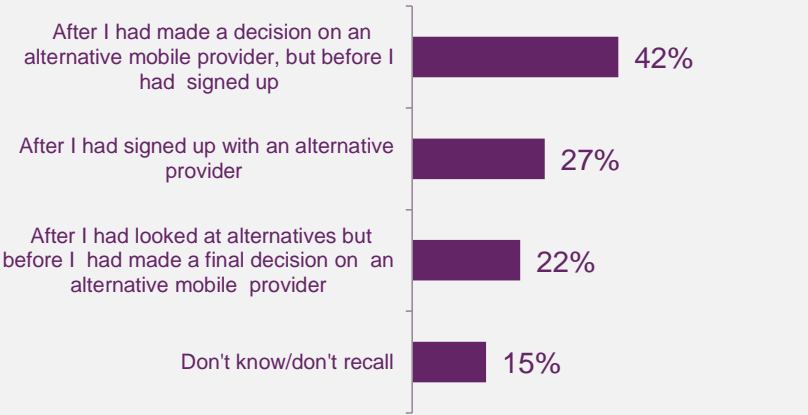
## The most common reason for contacting previous provider was to obtain PAC

### First point of contact on deciding to switch



■ Don't know ■ Your new provider ■ Your previous provider

### When made contact with previous provider



Reasons for contacting previous mobile provider before switched	Switched via PAC
To cancel my service/give notice	27%
To obtain a code to give to my new provider (PAC)	35%
To check how much my final bill would be	19%
To find out when my contract ended	18%
To arrange the 'stop date' in order to avoid paying both providers at the same time	17%
To find out if I needed to give them a notice period to leave	16%
To arrange the 'stop date' in order to avoid a break in service	16%
To find out what I needed to do to change provider	17%
To negotiate a better deal with my current provider	13%
To find out about any charges for ending my contract early	12%
To talk about their products and services	11%
To obtain information about my contract e.g. my usage patterns/spend	8%
Other	1%
Don't know/don't recall	11%

QD1 Once you had decided to switch i.e. you had selected an alternative mobile network provider, who did you contact first? QD3 And at what point did you contact your previous mobile provider?/ QD4 And which, if any, of these were reasons you contacted your previous provider before you switched?  
Base: All switched in last 18m (1306) / All switched via PAC in last 18m (705)/ All switched via C&R in last 18m (601)

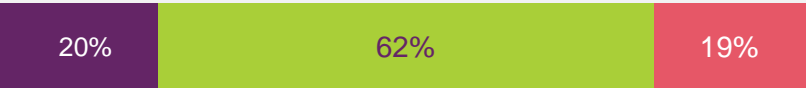
*Italics=not process related*



# Contact process and reasons for contact (Switched via C&R)

## For C&R it was to cancel service

### First point of contact on deciding to switch



■ Don't know ■ Your new provider ■ Your previous provider

### When made contact with previous provider



Reasons for contacting previous mobile provider before switched	Switched via C&R
To cancel my service/give notice	31%
To obtain a code to give to my new provider (PAC)	13%
To check how much my final bill would be	16%
To find out when my contract ended	17%
To arrange the 'stop date' in order to avoid paying both providers at the same time	16%
To find out if I needed to give them a notice period to leave	14%
To arrange the 'stop date' in order to avoid a break in service	13%
To find out what I needed to do to change provider	10%
<i>To negotiate a better deal with my current provider</i>	8%
To find out about any charges for ending my contract early	10%
<i>To talk about their products and services</i>	7%
<i>To obtain information about my contract e.g. my usage patterns/spend</i>	6%
Other	6%
Don't know/don't recall	24%

QD1 Once you had decided to switch i.e. you had selected an alternative mobile network provider, who did you contact first? QD3 And at what point did you contact your previous mobile provider?/ QD4 And which, if any, of these were reasons you contacted your previous provider before you switched?  
Base: All switched in last 18m (1306) / All switched via PAC in last 18m (705)/ All switched via C&R in last 18m (601)

*Italics=not process related*



## Reasons for contacting previous provider first (unprompted)



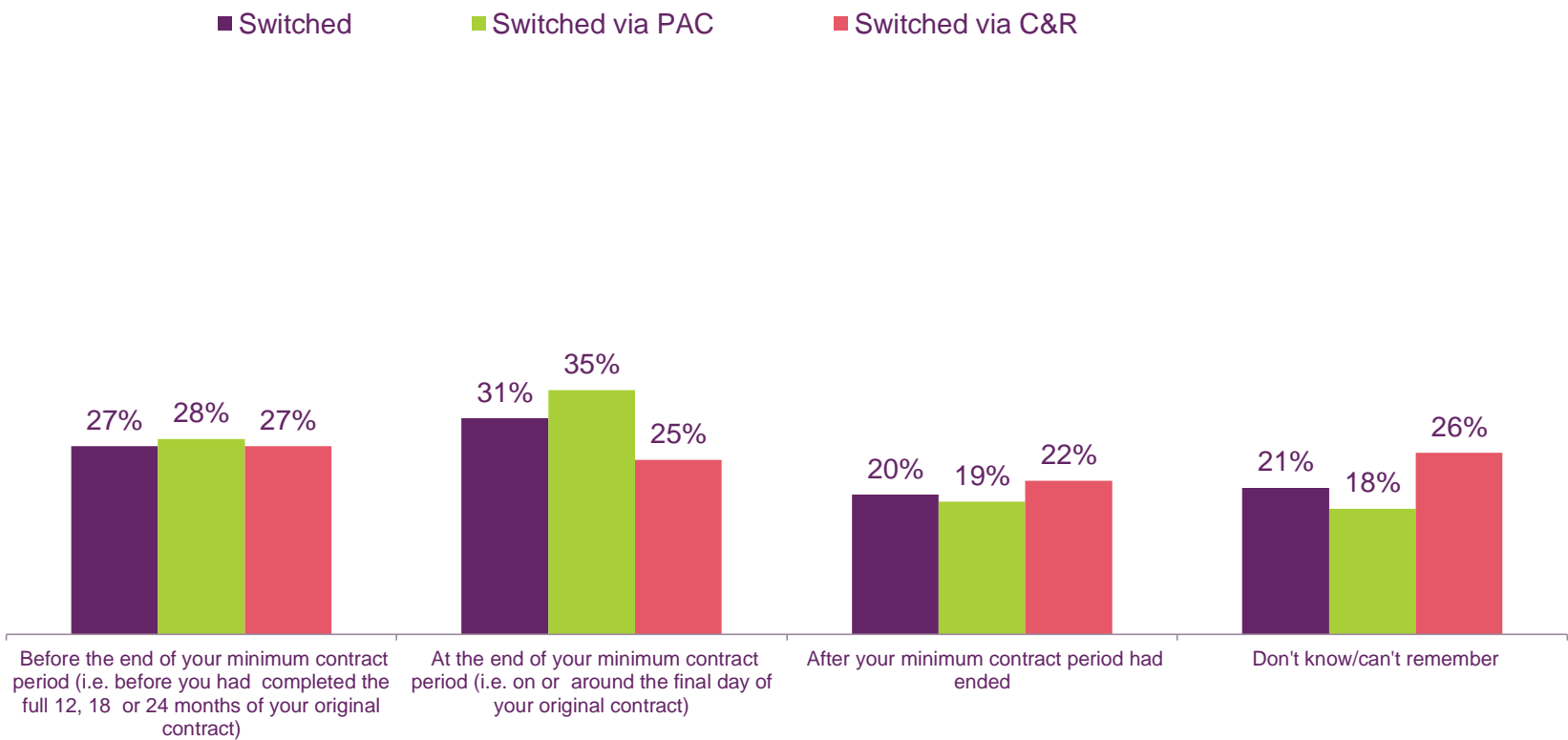
QD2 What was your main reason for contacting your previous provider first, instead of your new mobile provider?





# When gave notice to previous provider

Over one in four gave notice to their previous provider before the end of their minimum contract period



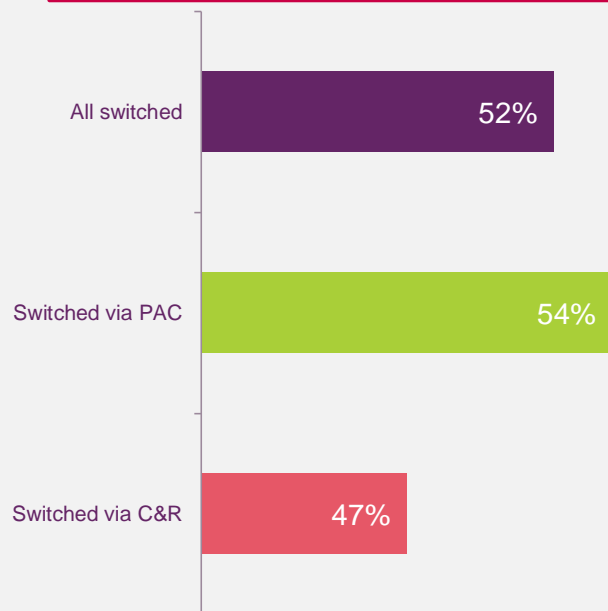
QD13 Before you left your previous mobile network provider, you would have been required to give them notice. This tends to be a period of 30 days.  
At what point did you give notice to your provider that you wanted to leave?  
Base: All switched in last 18m (1306) / All switched via PAC in last 18m (705)/ All switched via C&R in last 18m (601)



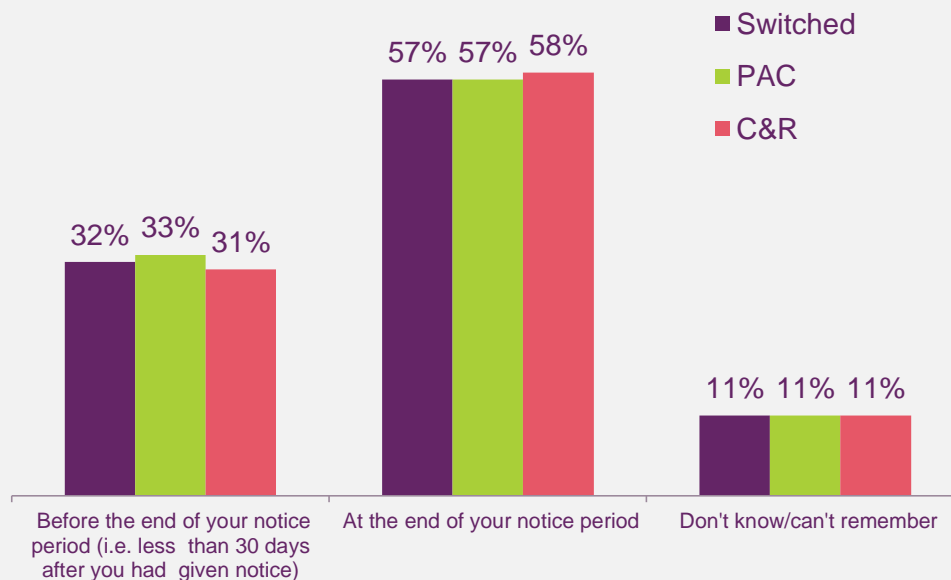
## When began using the new provider if at end/ out of contract

One third of those who gave notice at the end of contract/outside minimum contract, started using their new provider before the end of their notice period

Proportion who gave notice at the end of their contract or outside of their minimum contract:



Point began using their new mobile network provider (of those who gave notice at end of contract/ outside minimum contract):



QD17 You said you gave notice to your previous provider <IF CODE 2 AT QD13 at the end of your minimum contract period><FOR CODE 3 AT QD13 after your minimum contract period had ended>. At what point did you start using your new mobile network provider?

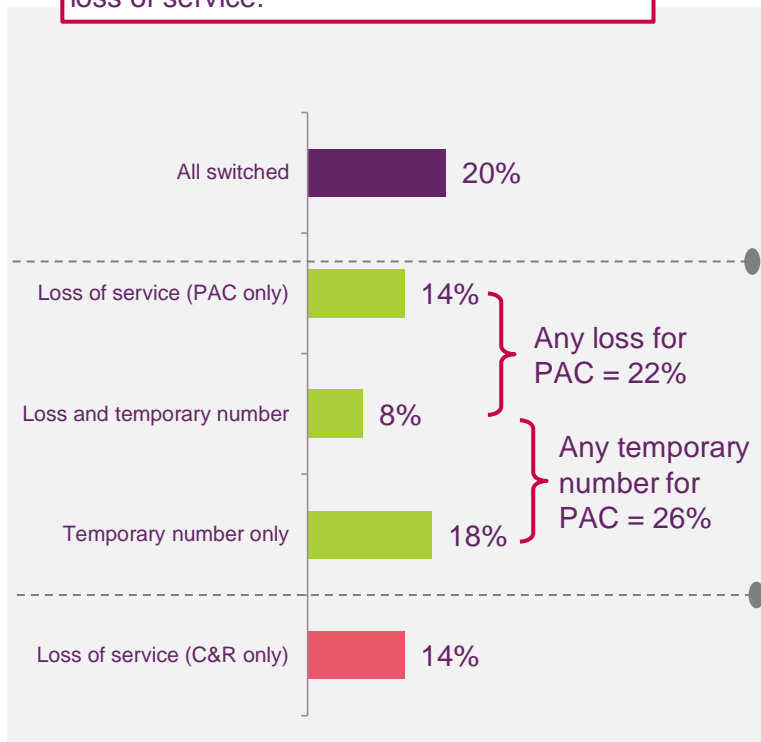
Base: All switched in last 18m (1306) / All switched via PAC in last 18m (705)/ All switched via C&R in last 18m (601)/ All giving notice at end of minimum/ after minimum: Switched (662), All via PAC (377), All via C&R (285)



## Whether experienced loss of service/ temporary number

### Two in five that switched via PAC experienced some loss of service

Proportion who experienced a temporary loss of service:

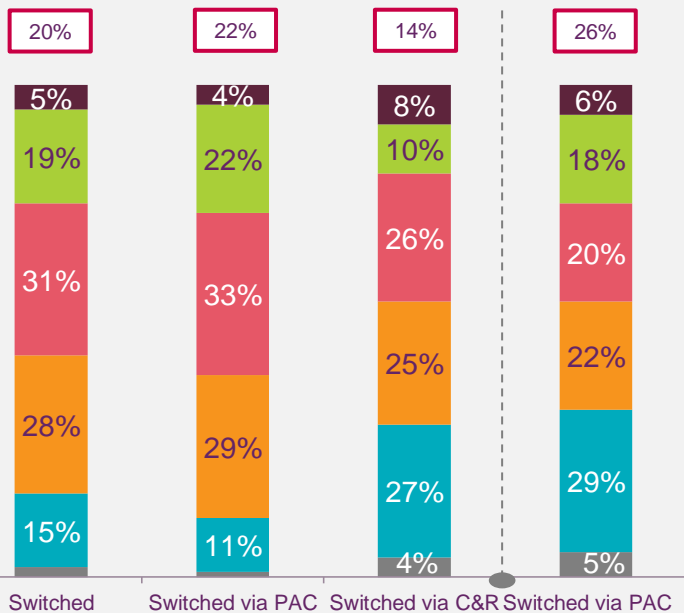


Length of loss of service

Temporary number

Experienced loss/  
temporary number

- A few minutes
- About an hour
- A few hours
- About a day
- More than a day
- Don't know/don't recall



QD22 When you switched, did you experience <[C&R] any period of time without your mobile service i.e. you were unable to make or receive calls/messages<[PAC] any period of time where you had no service i.e. you were unable to make or receive calls/messages or only had a temporary number and not the number you had taken with you>? QD23B How long were you without a service

Base: All switched in last 18m (1306) / All switched via PAC in last 18m (705)/ All switched via C&R in last 18m (601)/ All experienced a loss of service: Switched (229), Switched via PAC (146), Switched via C&R (83)

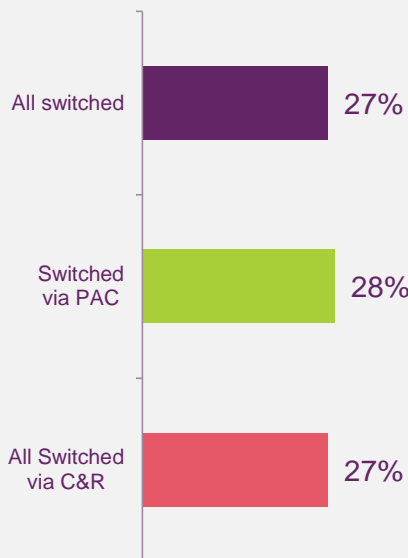
# **SWITCHING MOBILE PROVIDER: EARLY TERMINATION CHARGE (ETC)**



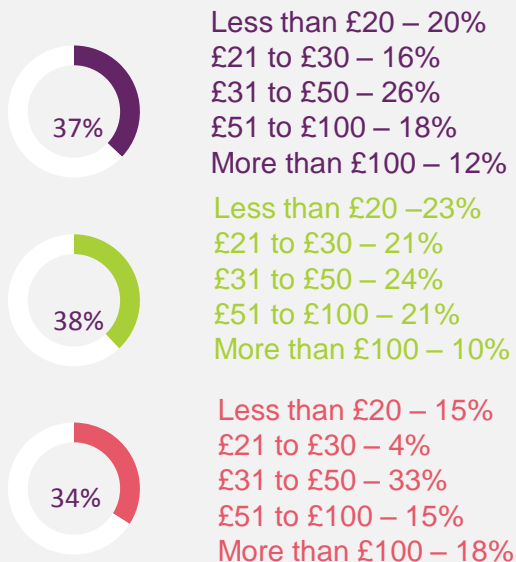
## Incidence/ amount of ETC and time left on contract

**Almost two in five of those who gave notice before the end of their contract period paid an ETC**

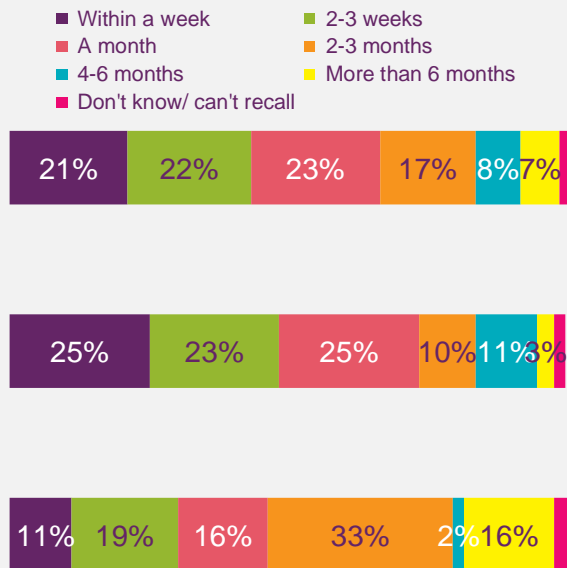
All who gave notice before the end of their minimum contract period



**Proportion paying an Early Termination Charge (ETC)**  
(of those who gave notice before end of contract)



How soon before the contract ended did they switch (those paying ETC)



QD13 Before you left your previous mobile network provider, you would have been required to give them notice. This tends to be a period of 30 days.

At what point did you give notice to your provider that you wanted to leave? QD14 When you switched, did you pay a charge for ending your previous contract early? This is called an 'early termination charge' and may need to be paid if you leave your provider before the end of your minimum contract period. QD15 How much did you have to pay? QD16 How soon before the end of your previous contract did you switch?

Base: All switched in last 18m (1306), All switched via PAC in last 18m (705), All switched via C&R in last 18m (601)/ All who gave notice before end of minimum contract period: Switched (349), Switched via PAC (194), Switched via C&R (155)/ All paid ETC: Switched (125), Switched via PAC (72), Switched via C&R (50)

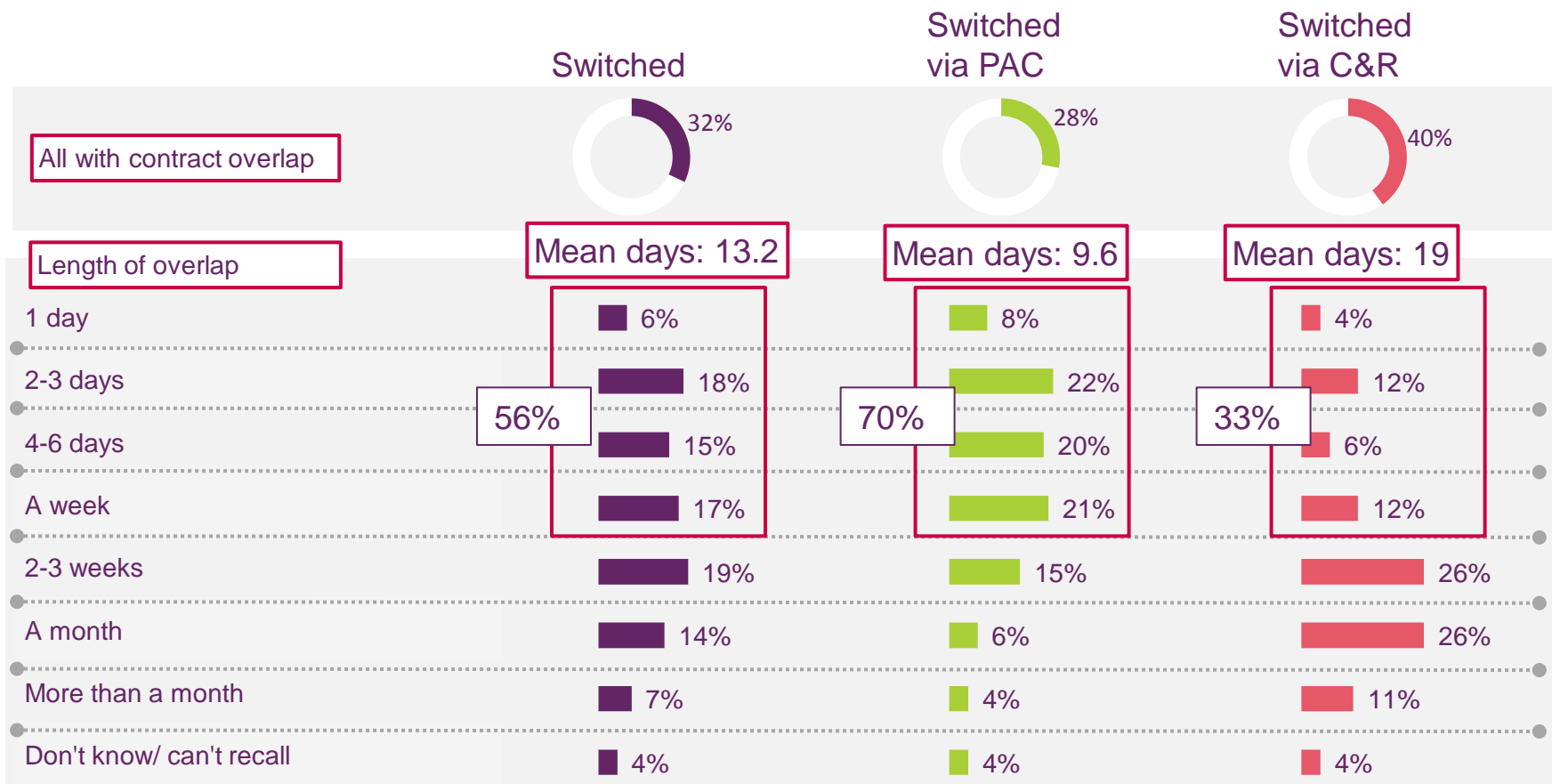


# SWITCHING MOBILE PROVIDER: CONTRACT OVERLAP



## Contract overlap incidence and length

A third recalled a contract overlap, higher among C&R switchers than among PAC



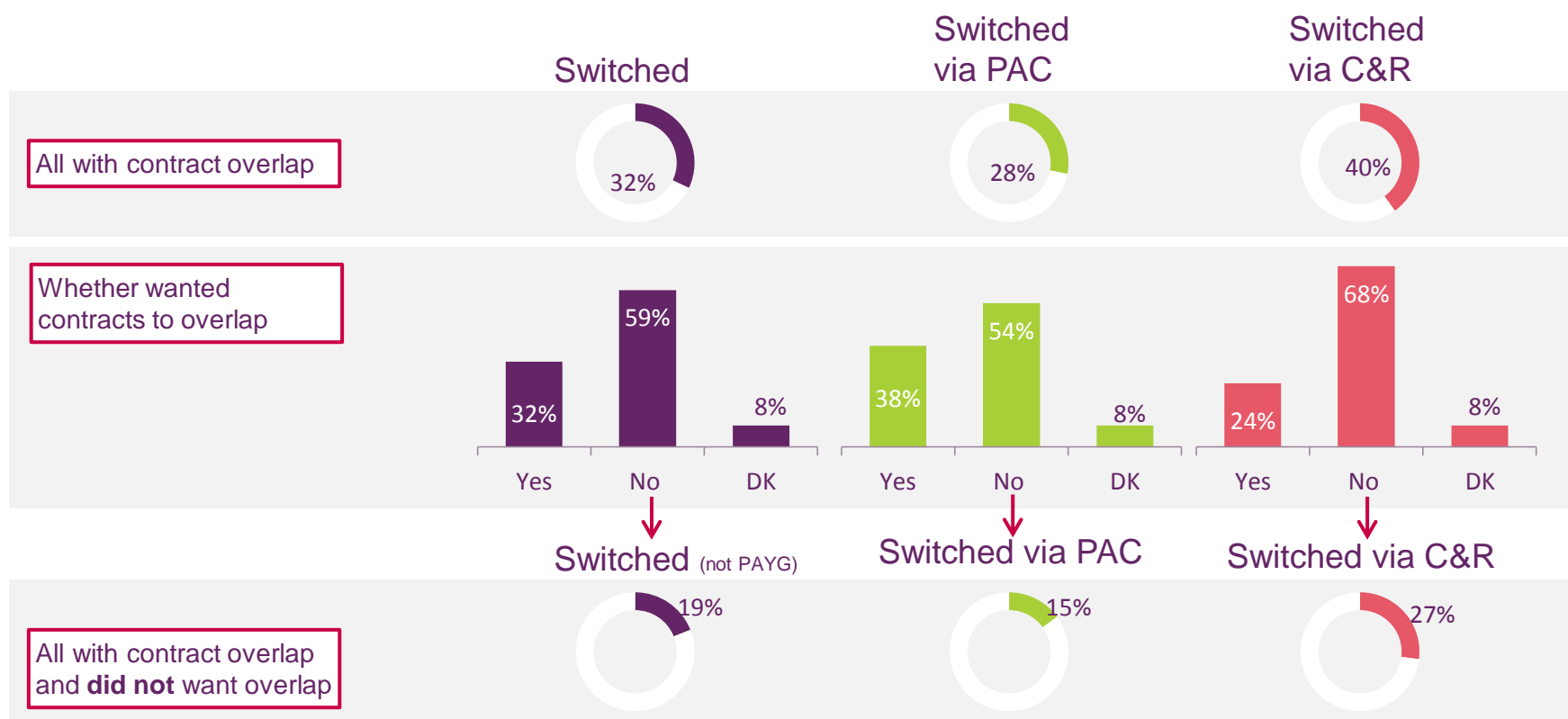
QD18 Did the contracts for your old and new mobile service overlap at all? In other words were you paying for both of them at the same time for any period? QD19 How long did the contracts overlap for? In other words how long were you paying for both of them at the same time?

Base: All switched in last 18m which did not switch from PAYG (882), All switched via PAC in last 18m (705), All switched via C&R in last 18m (601)/ All who had contracts which overlapped: Switched (284), Switched via PAC (140), Switched via C&R (144)



## Contract overlap attitude

Overall one in five had an unwanted contract overlap, rising to over one quarter for C&R



QD18 Did the contracts for your old and new mobile service overlap at all? In other words were you paying for both of them at the same time for any period? QD20 Did you want the contracts to overlap?

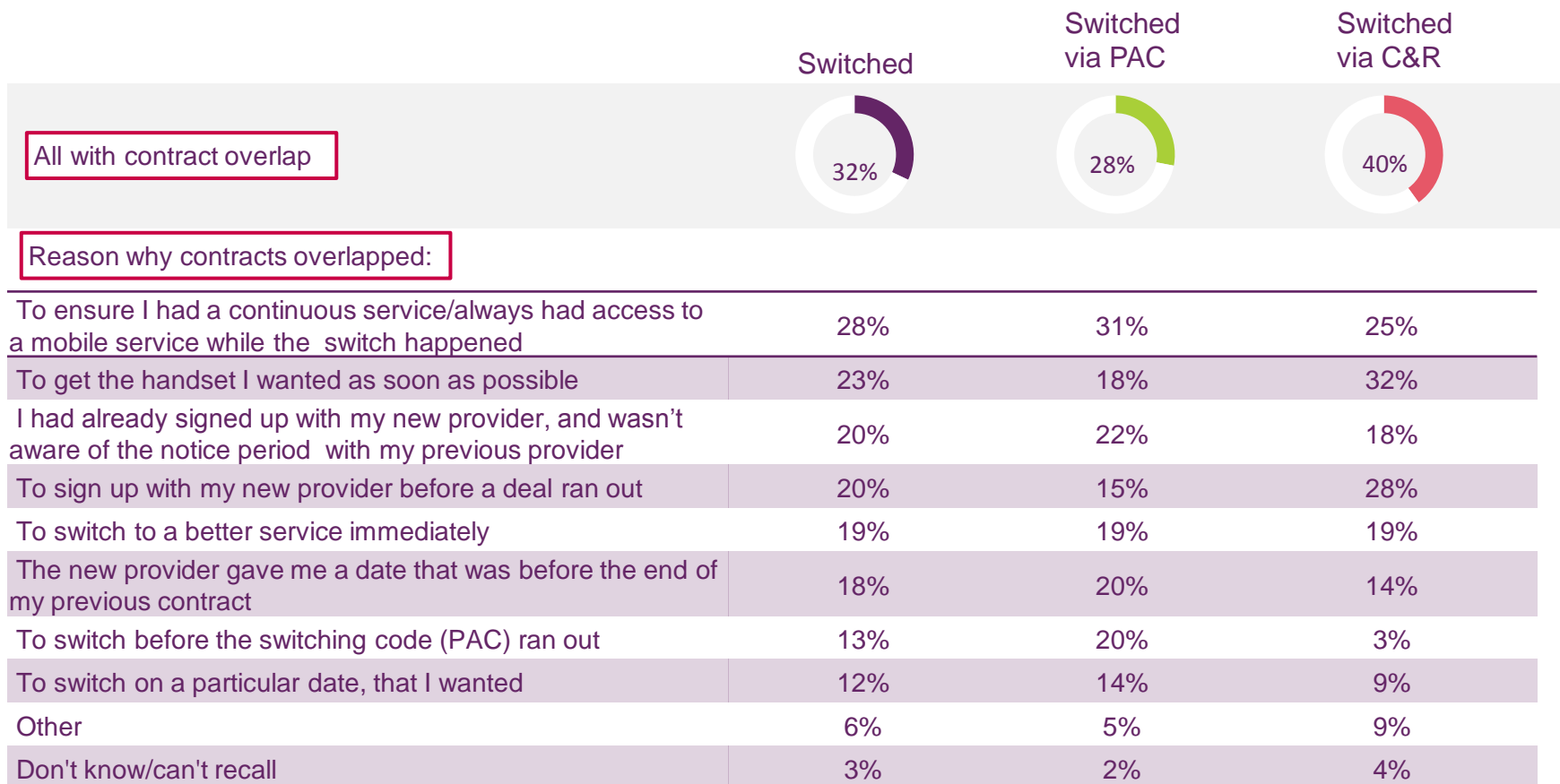
Base: All switched in last 18m which did not switch from PAYG (882), All switched via PAC in last 18m (705), All switched via C&R in last 18m (601)/ All who had contracts which overlapped: Switched (284), Switched via PAC (140), Switched via C&R (144)



## Contract overlap reason



**C&R sample indicate stronger desire to take up a new service more quickly than PAC i.e. more likely to want new handset immediately or to take up a deal before it ran out**



QD18 Did the contracts for your old and new mobile service overlap at all? In other words were you paying for both of them at the same time for any period? QD21 Why did the contracts overlap?

Base: All switched in last 18m which did not switch from PAYG (882), All switched via PAC in last 18m (705), All switched via C&R in last 18m (601)/ All who had contracts which overlapped: Switched (284), Switched via PAC (140), Switched via C&R (144)



# Contract overlap in order to ensure continuity

Overlap shorter among those who did so to ensure continuity (but twin-peaked)

Switched with overlap

Switched with overlap; citing "to ensure continuity of service" as reason

Switched with overlap; not citing "to ensure continuity of service" as reason

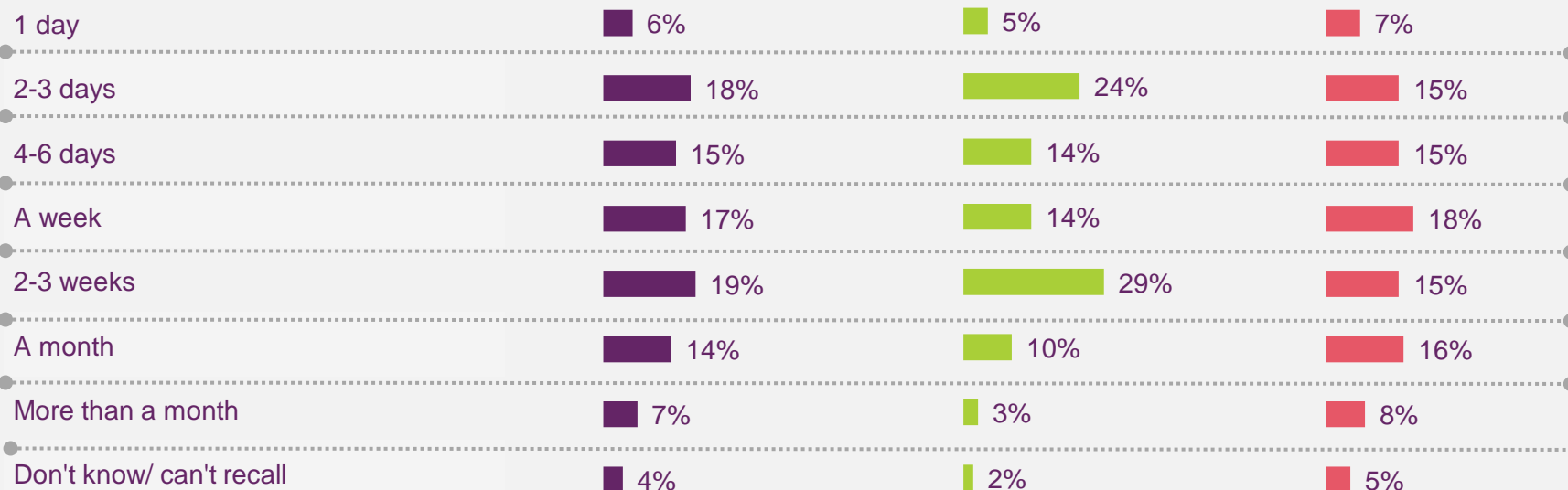
Length of overlap

Weighted average:

13.2 days

11.6 days\*

14.0 days



QD18 Did the contracts for your old and new mobile service overlap at all? In other words were you paying for both of them at the same time for any period? QD19 How long did the contracts overlap for? In other words how long were you paying for both of them at the same time?

Base: All who had contracts which overlapped (220), All who had contracts which overlapped and cited "to ensure continuity of service" as reason for overlap (63), All who had contracts which overlapped and did not cite "to ensure continuity of service" as reason for overlap (157)

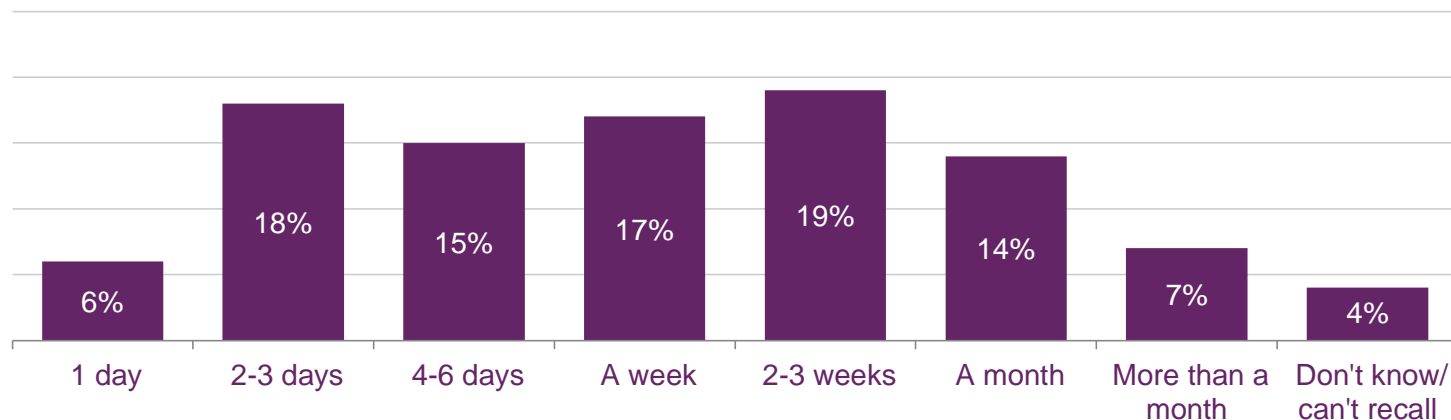
\* Low base



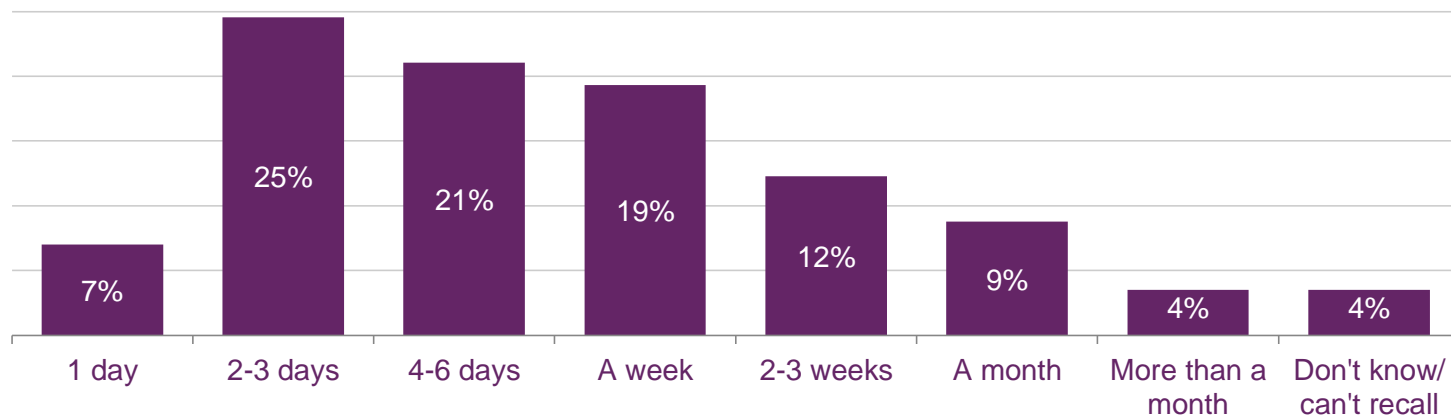


## Loss of service vs. contract overlap duration

Duration of contract overlap (switchers who experienced contract overlap)



Duration of contract overlap (switchers who experienced contract overlap AND loss of service)



Note: bases too small to distinguish between PAC/C&R or duration of loss of service

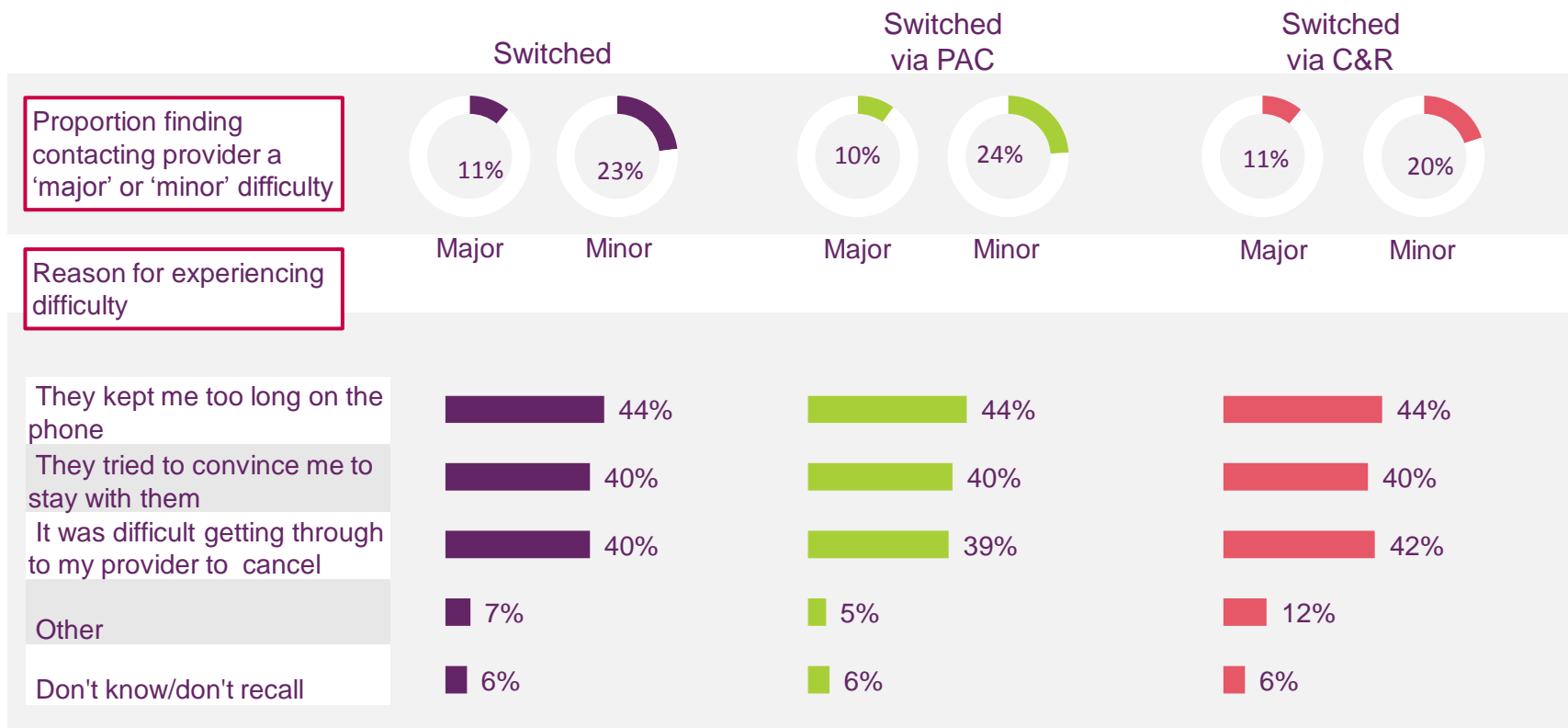
QD22 When you switched, did you experience any period of time without your mobile service i.e. you were unable to make or receive calls/messages /  
QD18 Did the contracts for your old and new mobile service overlap at all? In other words were you paying for both of them at the same time for any period?  
Base: Experienced contract overlap (220), Experienced both loss of service and contract overlap (57)

# **SWITCHING MOBILE PROVIDER: EXPERIENCE OF CONTACT WITH PREVIOUS AND CURRENT PROVIDER**



## Experience of contacting previous provider to leave

Among those who found it difficult to contact their previous provider, being kept on the phone for too long, getting through and save attempts were all contributing factors



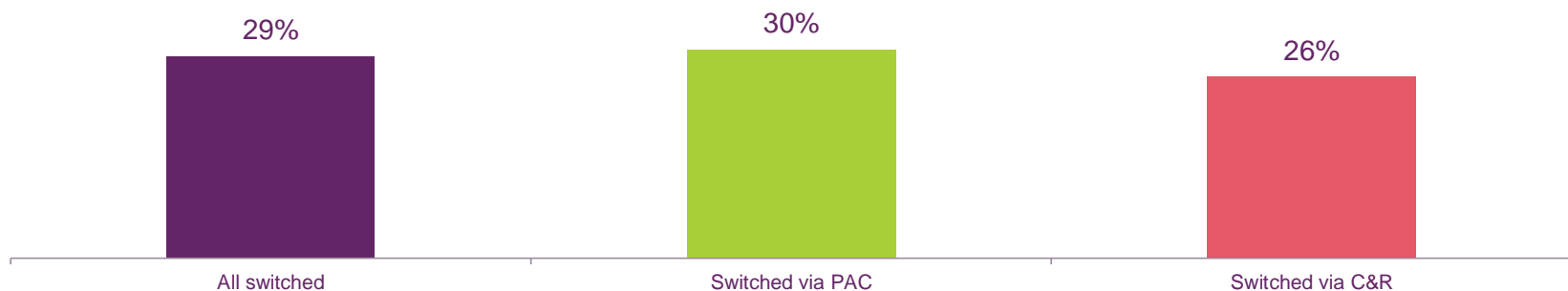
QA15A And which, if any, of these did you experience difficulty with...? / QA16c What was difficult about contacting your previous provider?

Base: All switched in last 18m (1306), All switched via PAC in last 18m (705), All switched via C&R in last 18m (601)/ All who found it difficult: Switched (414), Switched via PAC (234), Switched via C&R (180)



## Whether told about any provider specific benefits when called previous provider to switch

**3 in 10 were told about benefits such as friends and family discounts that they may lose if switched**



QB7 When you contacted your provider to switch, did they tell you about any provider-specific benefits (such as friends and family discounts, 2 for 1 cinema tickets) that you might lose by switching away from them?

Base: All switched in last 18m (1306) / All switched via PAC in last 18m (705)/ All switched via C&R in last 18m (601)



easy helpful friendly quick good difficult annoying frustrating simple efficient unhelpful straightforward slow bad irritating stressful clear uninterested pointless consuming polite boring informative confusing waiting difficult boring informative confusing waiting

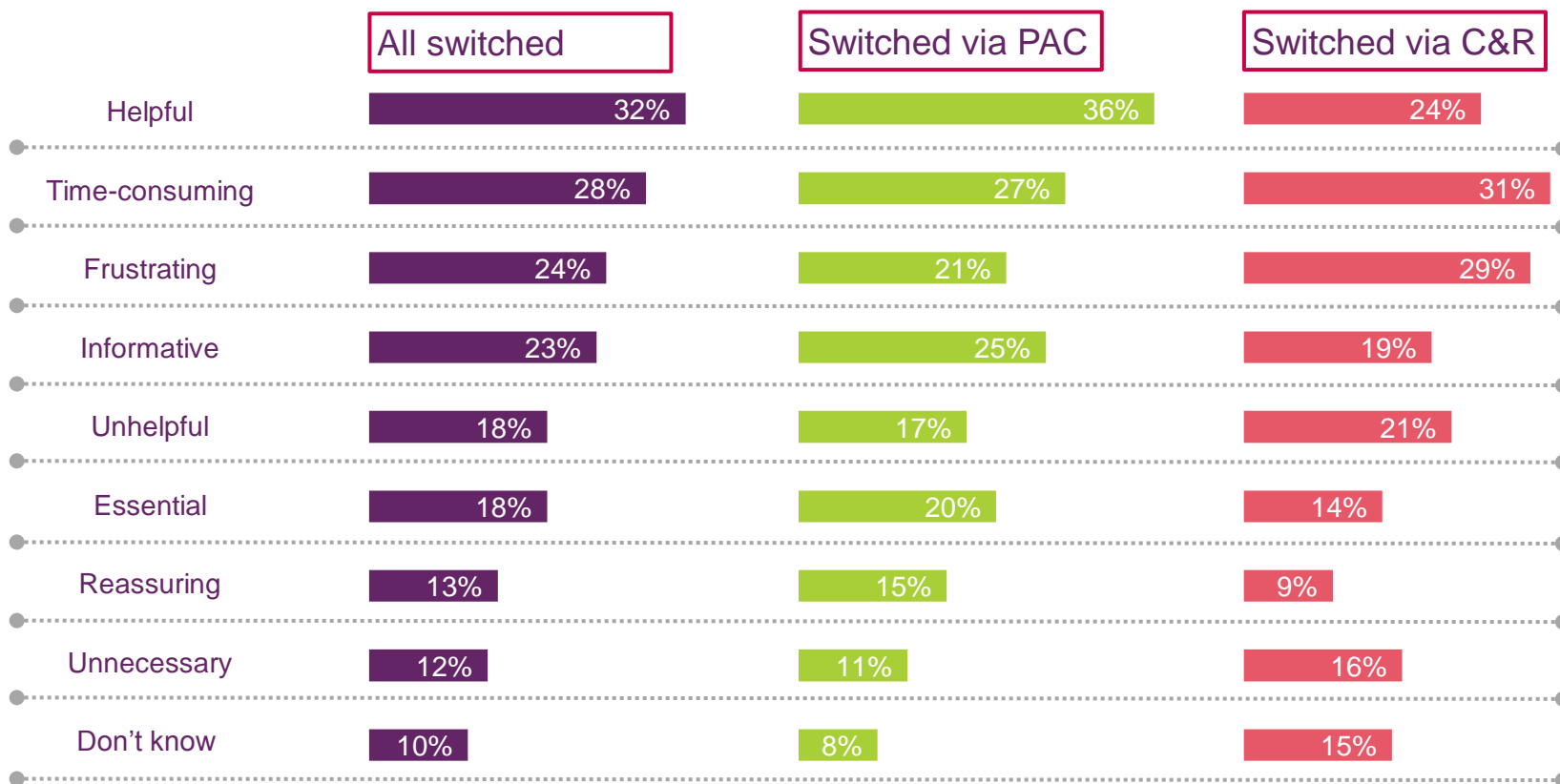
©Ofcom





## Words used to describe contact with previous provider (prompted)

**'Helpful' was the most commonly used word to describe contact with previous provider although via C&R this was lower than 'time consuming' and 'frustrating'**

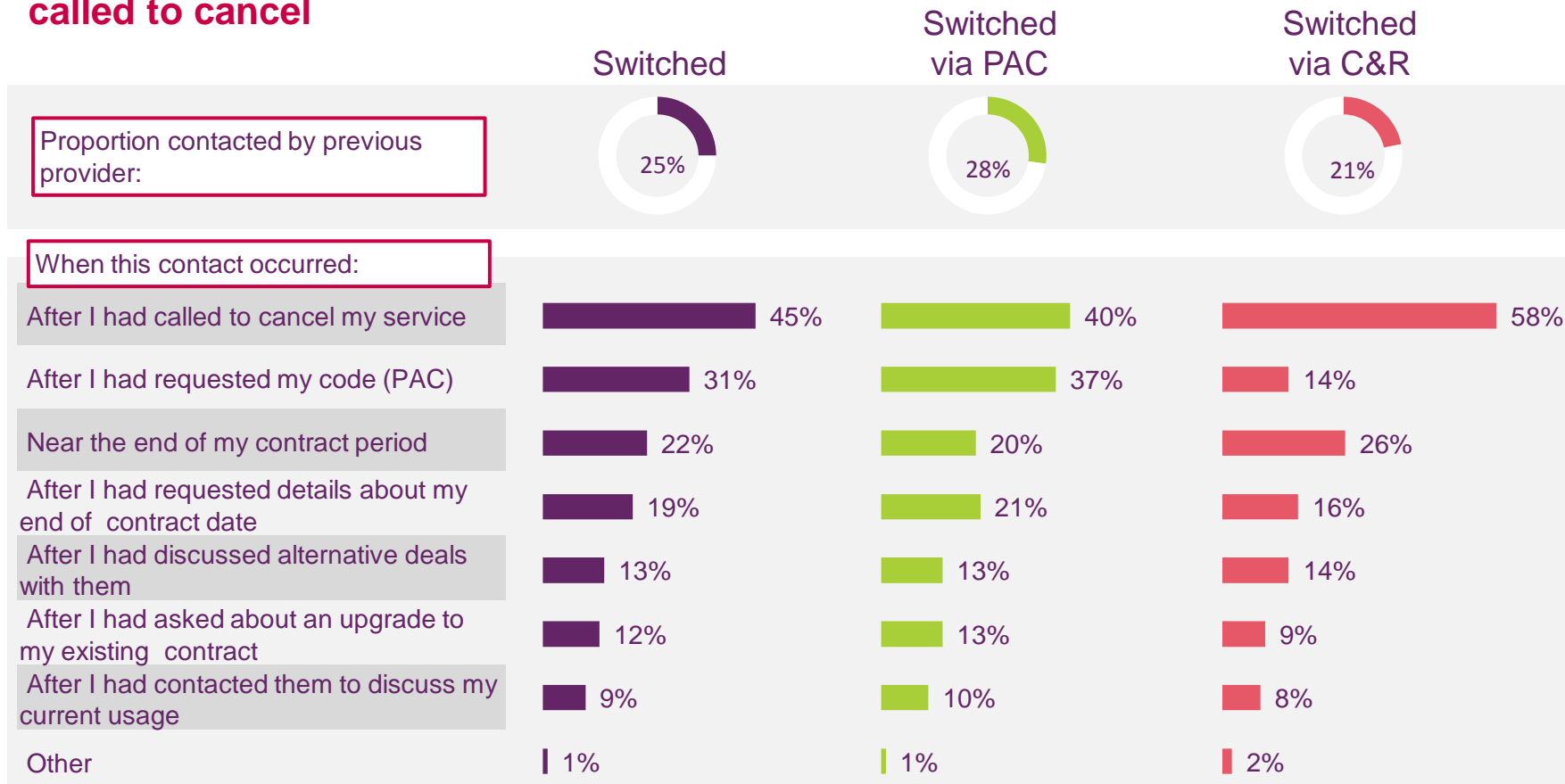


QD8 And still thinking about the conversations you had with your previous provider when switching, which of the following words would you use to describe this contact?  
Base: All switched in last 18m (1306) / All switched via PAC in last 18m (705)/ All switched via C&R in last 18m (601)



## Contact from previous provider

A quarter were contacted by their previous provider. For half this was after they called to cancel



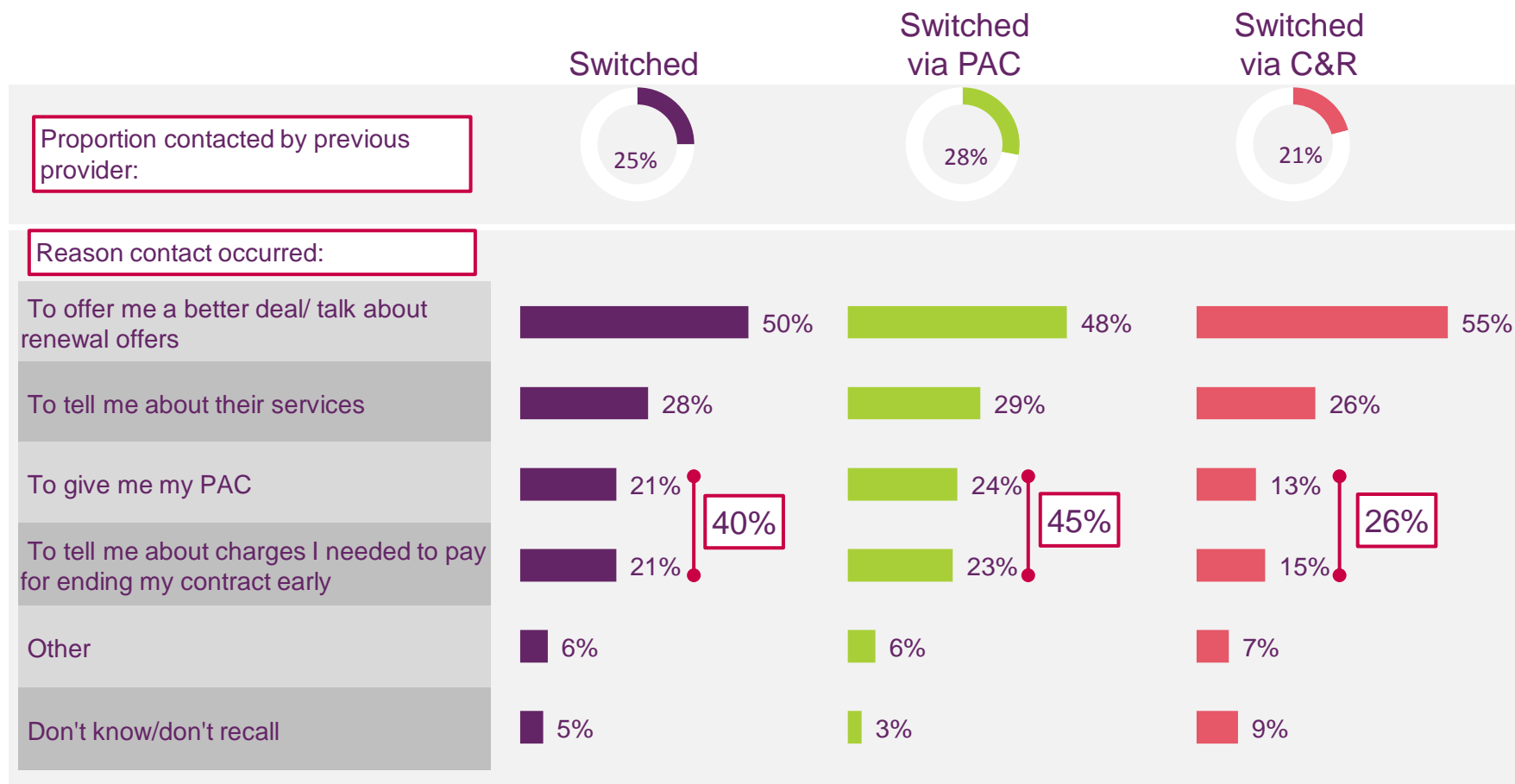
QD9 Did your previous mobile provider contact you at any point just before or after you had decided to change provider ? (e.g. via text, phone call or a letter etc.)/ QD10 At what point did your previous mobile provider contact you?

Base: All switched in last 18m (1306) / All switched via PAC in last 18m (705)/ All switched via C&R in last 18m (601)/ All contacted: Switched (313), Switched via PAC (193), Switched via C&R (120)



## Reason for contact from previous provider

Half were contacted to be offered a better deal, more than for PAC/ info about charges



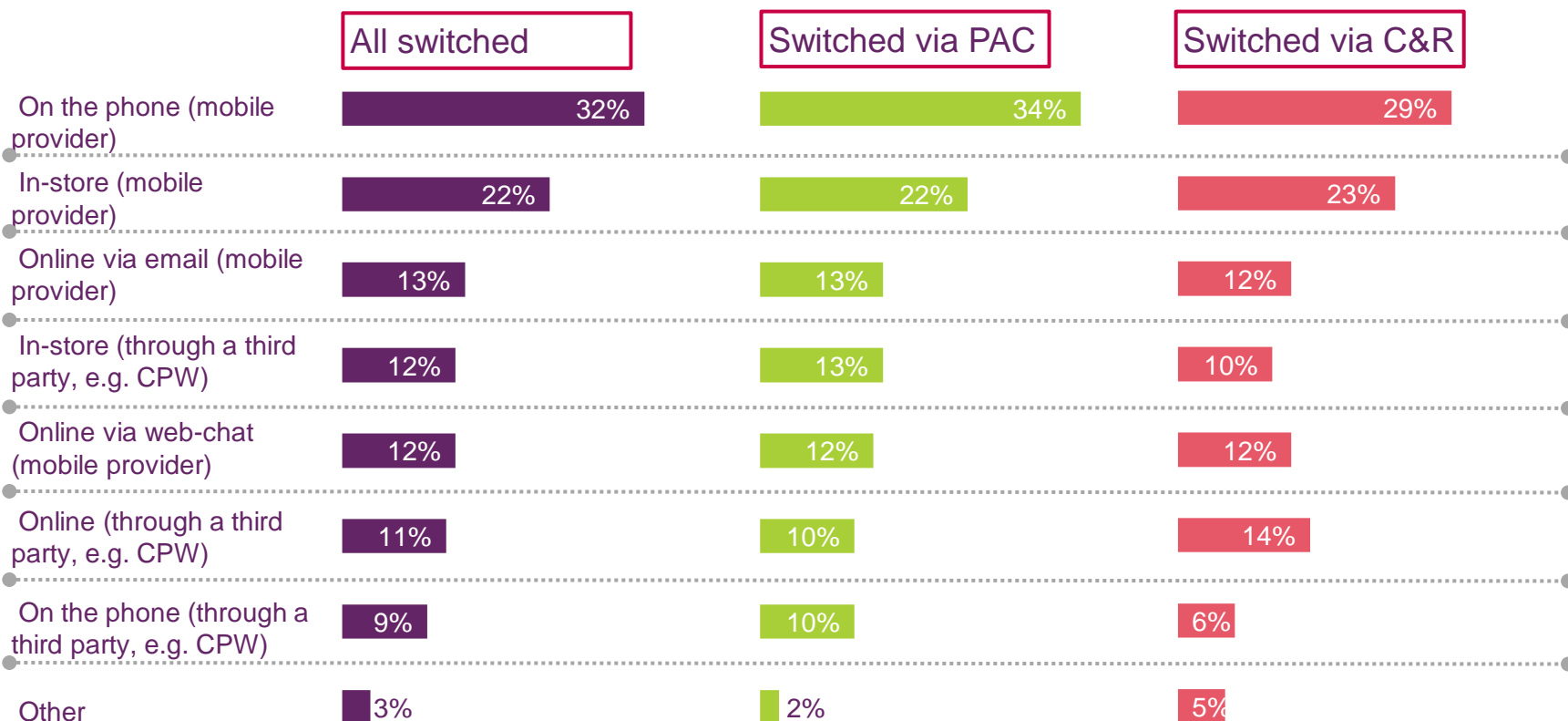
QD11 Do you recall why your previous mobile provider contacted you?

Base: All contacted: Switched in last 18M (313), Switched via PAC (193), Switched via C&R (120)



## Methods used to contact new provider

A third contacted their new provider on the phone, a fifth in store



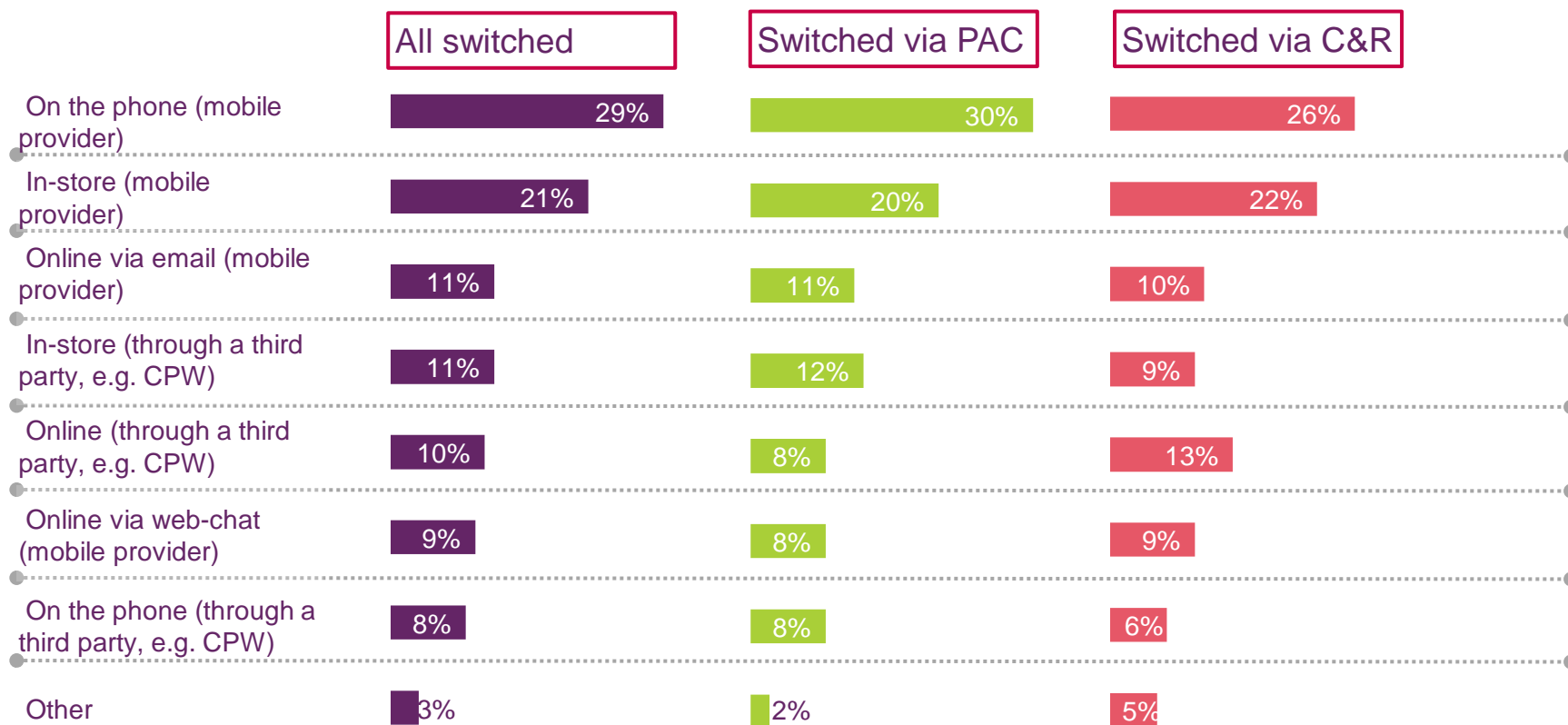
QD12A How did you contact your new provider when switching your service?

Base: All switched in last 18m (1306) / All switched via PAC in last 18m (705) / All switched via C&R in last 18m (601)



## Main method used to contact new provider

The main method of contact for the new provider was via phone



QD12a/b How did you contact your new provider when switching your service?/ And which was the main method?  
Base: All switched in last 18m (1306) / All switched via PAC in last 18m (705)/ All switched via C&R in last 18m (601)



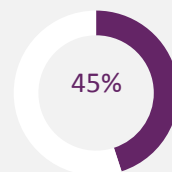
# SWITCHING MOBILE PROVIDER: PAC



## At what point was the contact to request the PAC / cancel service

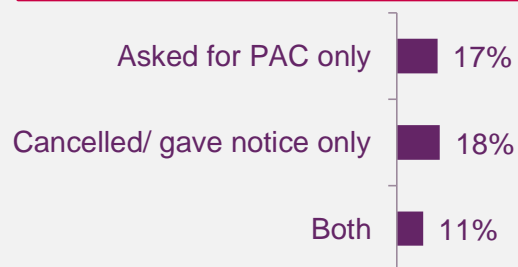
**Almost half asked for either, most did not ask for both**

Asked for PAC **or** cancelled service when contacted previous provider **before** they switched:



49% PAC  
38% C&R

Reasons for contacting previous provider before switch:



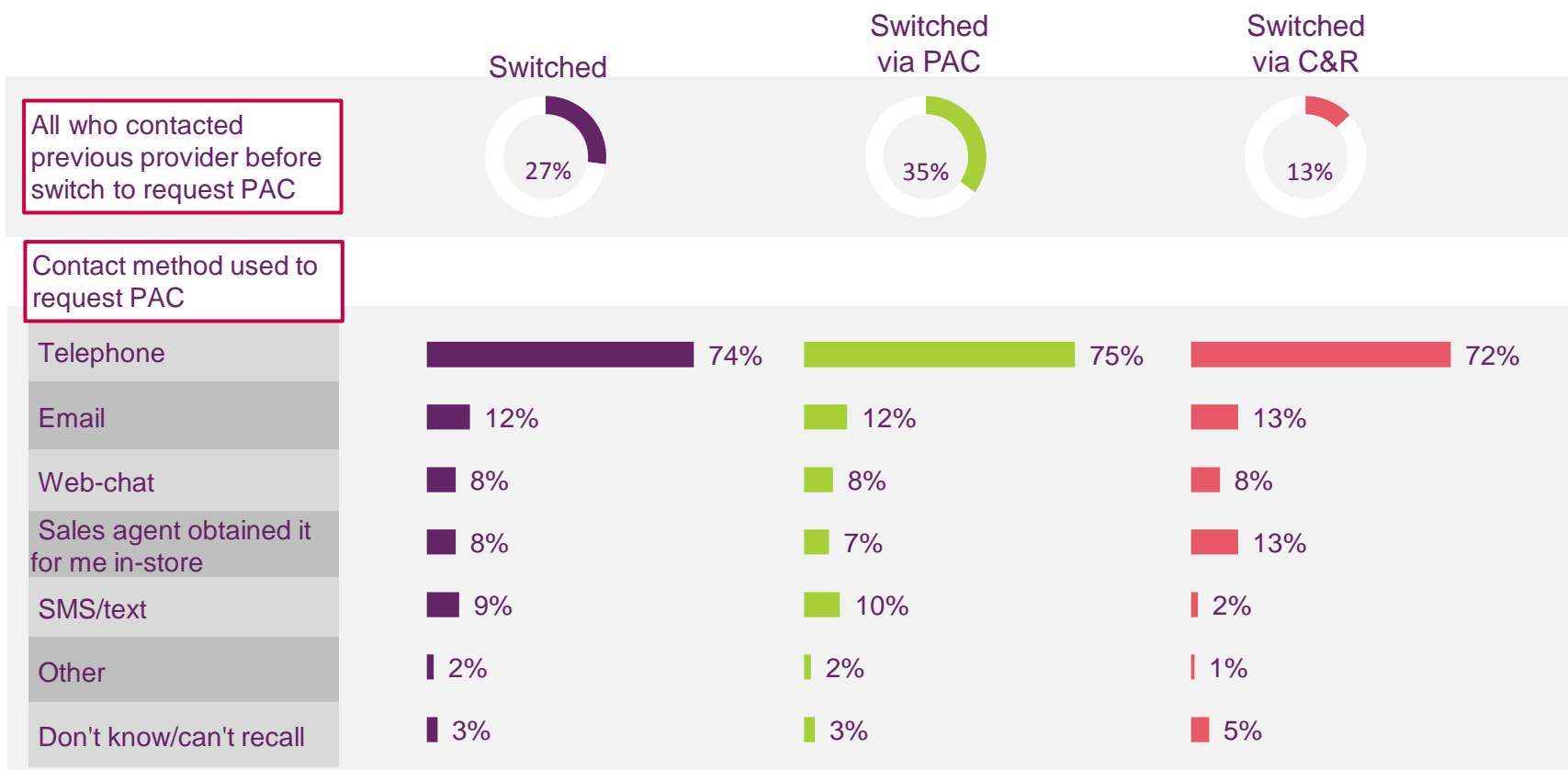
Of those doing both ..

8% did at the same time  
1% cancelled first  
(Remainder did not know)



## Method of contact used to request PAC

Telephone was the most common contact method used to request PAC



QD4 And which, if any, of these were reasons you contacted your previous provider before you switched? / QE1 You said earlier that you requested a code (a PAC) from your previous provider, how did you contact your provider to request the code?

Base: All switched in last 18m (1306), All switched via PAC in last 18m (705) , All switched via C&R in last 18m (601)/ All who made contact to receive a PAC: Switched (330), Switched via PAC (256), Switched via C&R (74)



## Means of receiving PAC (those contacted to request it)

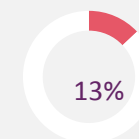
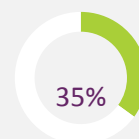
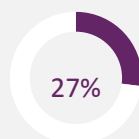
**SMS was the most recalled means of receiving PAC, although telephone and email also figure**

Switched

Switched  
via PAC

Switched  
via C&R

All who contacted  
previous provider before  
switch to request PAC



Method of receiving PAC:

SMS/text



Telephone



Email



Sales agent obtained it for me in-store



Web-chat



Other



Did not receive code from provider



Don't know/can't recall



QD4 And which, if any, of these were reasons you contacted your previous provider before you switched? / QE2 And how did you actually receive the code?

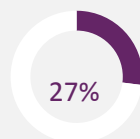
Base: All switched in last 18m (1306), All switched via PAC in last 18m (705) , All switched via C&R in last 18m (601)/ All who made contact to receive a PAC: Switched (330), Switched via PAC (256), Switched via C&R (74)



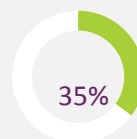
## What discussed when contacted previous provider for PAC

Around half discussed something other than the PAC when they contacted their previous provider for it

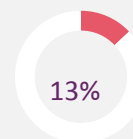
Switched



Switched via PAC

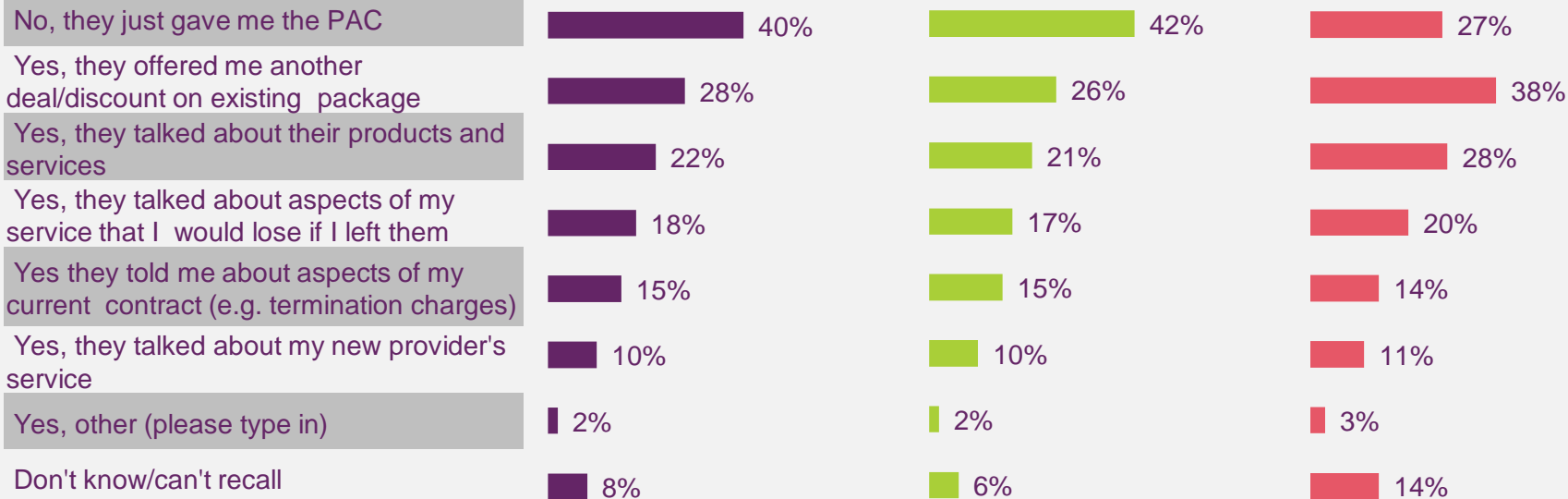


Switched via C&R



All who contacted previous provider before switch to request PAC

What else was talked about:



QD4 And which, if any, of these were reasons you contacted your previous provider before you switched? / QE3 Did your <SWITCHER previous provider talk to you about anything else when you contacted them to obtain the code?

Base: All switched in last 18m (1306), All switched via PAC in last 18m (705), All switched via C&R in last 18m (601)/ All who made contact to receive a PAC: Switched (330), Switched via PAC (256), Switched via C&R (74)





## Experience of obtaining PAC

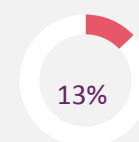
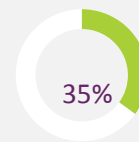
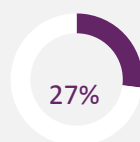
### Four in five found obtaining the PAC code 'easy'

Switched

Switched  
via PAC

Switched  
via C&R

All who contacted previous  
provider before switch to  
request PAC



Experience of obtaining PAC:

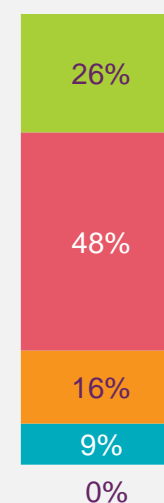
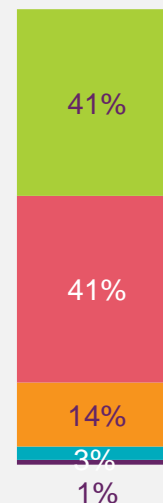
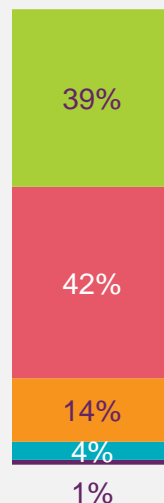
*Easy (net):*

81%

82%

75%

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



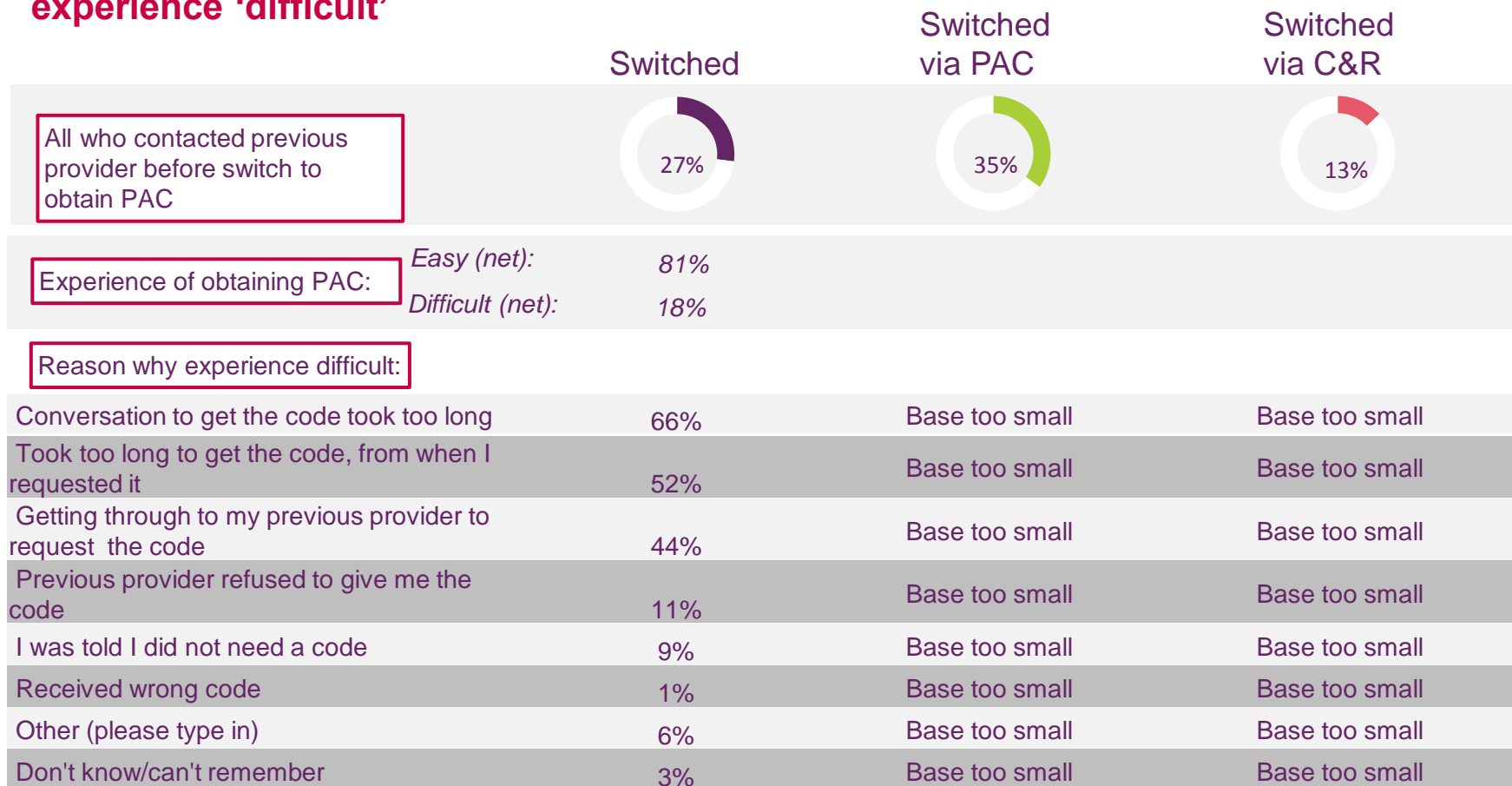
QD4 And which, if any, of these were reasons you contacted your previous provider before you switched? / QE4 How easy, or difficult, did you find it to obtain your PAC?

Base: All switched in last 18m (1306), All switched via PAC in last 18m (705), All switched via C&R in last 18m (601)/ All who made contact to receive a PAC: Switched (309), Switched via PAC (256), Switched via C&R (53)



## Reason for negative experience of obtaining PAC

Reasons around it taking 'too long' were the most commonly cited as making the experience 'difficult'



QD4 And which, if any, of these were reasons you contacted your previous provider before you switched? QE4 How easy, or difficult, did you find it to obtain your PAC? QE5B And which, if any, of the following were reasons you felt it was difficult to get the code?

Base: All switched in last 18m (1306), All switched via PAC in last 18m (705) , All switched via C&R in last 18m (601)/ All who had a difficult experience receiving the PAC: Switched (56), Switched via PAC (45), Switched via C&R (11)



## What was difficult about getting the code

*Had to go through a debate before they'd release it to me*  
**Male, 61**

*They spent too much time trying to get me to stay a customer*  
**Female, 35**

*Had to speak with 3 different people before being able to obtain it. I think purposely difficult so that you'd give up*  
**Female, 29**

*On a number of occasions Virgin were asked to provide the PAC code and refused - we ended up having to contact their chief exec office and speak to someone higher up the chain to organise getting the code. The staff at the chief exec office were not terribly impressed and even nullified our final mobile bill because of the hassle we had been through*  
**Female, 44**

*I rang Customer Services who passed me to someone else who passed me to someone else ... they seemed reluctant to help or even empathise that the services they now offered existing Orange customers, now that they were EE, was poor in comparison*  
**Female, 50**

*Trying to keep me to stay with them*  
**Male, 23**

*Because I was kept waiting on the line for ages*  
**Female, 47**

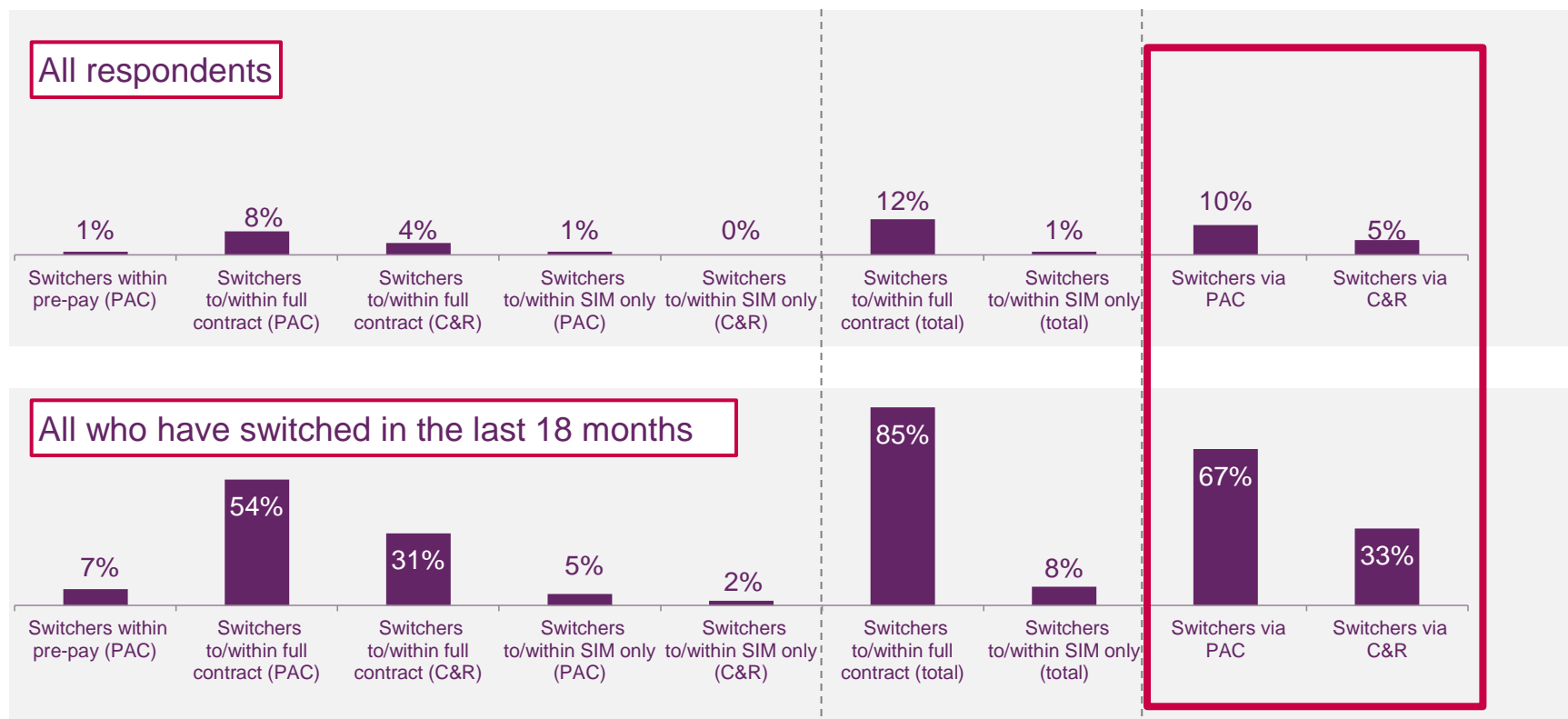
*They just wanted to sell me more and keep my custom. I had to talk to at least 3 people each time answering basically the same questions. They were a pain. They first wanted me to phone them on a number which would have cost me rather than the free customer services number*  
**Male, 57**

*They seemed more interested in convincing me to stay than just sending out the code. I had to contact them twice as the first the code didn't arrive*  
**Female, 37**

# **SWITCHING MOBILE PROVIDER: REASONS FOR CEASE AND RE- PROVIDE**



## Split of C&R and PAC switches



QA12 When you switched, what type of mobile package did you switch from?/ QA6 Which of these best describes the main mobile phone package you personally use and pay for? / QA13 And when you switched did you..?

Base: All respondents (6762) / All switched last 18M (1306)

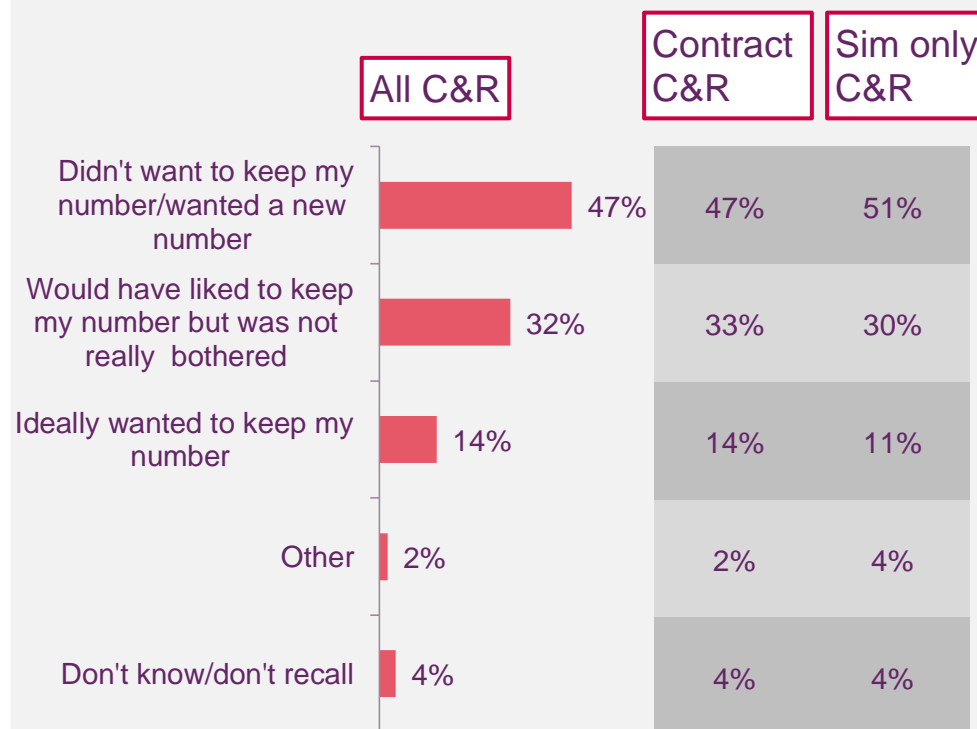
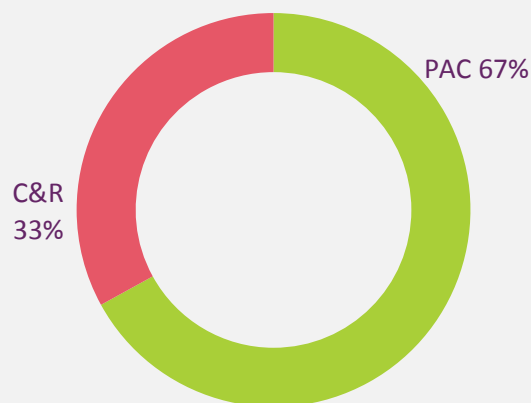




## Whether C&R wanted to keep number

**Just over one (14%) in ten C&R switchers said they had ‘ideally wanted to keep their number’**

Method of switch  
(all who switched in last 18m)



QA12 When you switched, what type of mobile package did you switch from?/ QD24 You mentioned earlier that you got a new mobile number when you switched provider. Which of the following best describes your original preference for keeping your previous number when you switched?

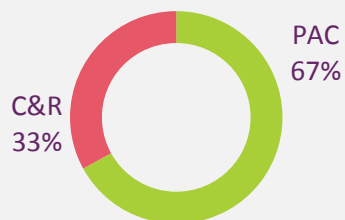
Base: All who switched providers in the last 18 months: 1306, All who switched via C&R (601), All C&R to/ within full contract (501), All C&R to/ within SIM only (100)



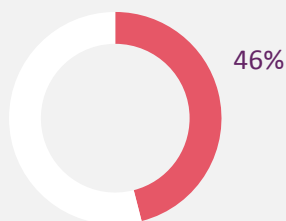
## Reasons why C&R did not keep their number

Perception of those who did not keep number, but may have liked to do so, was for a third that it was going to be faster to not do so, and a third that that it would be easier

Method of switch  
(all who switched in last 18m)



C&R but wanted/ would have liked to keep old number



Reason why C&R despite wanted/ would have liked to keep old number (Prompted)

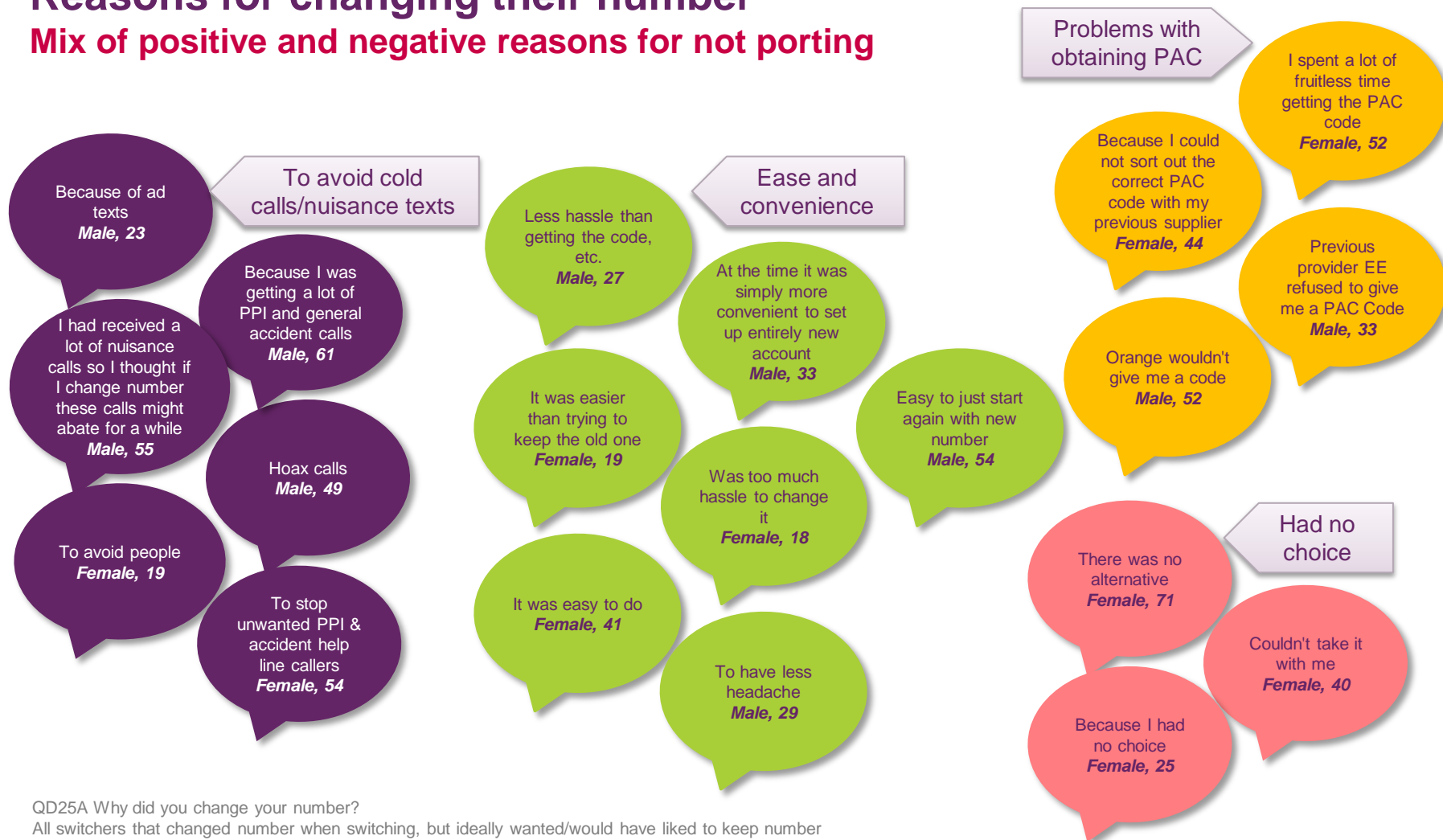
It was easier to switch if I didn't keep my number	32%
It was faster to switch and get a new number /was going to take too long to keep my number	32%
I didn't want to pay to keep my number	18%
I was unaware I could keep my number	13%
I needed to make extra calls to get a PAC code	13%
I might have been without my mobile service if I had kept my number	11%
My new provider told me I couldn't keep my number	10%
My old provider told me I couldn't keep my number	10%
Other	4%
Don't know/can't recall	7%

QA12 When you switched, what type of mobile package did you switch from?/ QD25b And which, if any, of these were reasons why you changed your number?  
Base: All who switched providers in the last 18 months: 1306, All who switched via C&R (601), All who switched via C&R but wanted old number (275)



## Reasons for changing their number

### Mix of positive and negative reasons for not porting



QD25A Why did you change your number?

All switchers that changed number when switching, but ideally wanted/would have liked to keep number

# EXPERIENCE OF CONSIDERING SWITCHING PROVIDER



# CONSIDERING SWITCHING MOBILE PROVIDER: SUMMARY



## Summary: consumers who ‘considered’ switching

### Who they are

- It was a minority of the sample (5%) who considered switching providers in the past 12 months but decided not to
- More were currently considering switching provider (19%), however the views of these consumers have not been included because they did not have a complete view of the consideration or switching journey
- Those who considered switching were more likely to be male than those who had switched provider. They were also slightly more likely to be social grades ABC1
- Their attitudes towards technology were similar to those who have switched and were more confident about technology than the overall sample, e.g. 76% agreed that they ‘try and keep up with technology’ vs. 61% of the total sample
- However, they were less likely to have switched provider for services in other markets
  - Just over half had done so for the services asked about, compared to two thirds for those who had switched mobile provider





## Summary: consumers who ‘considered’ switching

The journey that those who ‘considered’ switching took

- Almost all (91%) who considered switching had taken some action related to it. For 45% this involved ‘looking online at potential new provider’s website’
- Those who considered switching and wanted to keep their number were slightly more likely to have contacted their provider regarding the switch (73% vs. 66%)
- When thinking about switching, in most cases those that contacted their current provider had looked at alternative providers (53%), and 13% had made a decision but not signed up (13%)
- Experiences of contacting providers: 11% said ‘difficulty in contacting their current provider’ was a ‘major’ factor in remaining with them, and a further 19% a ‘minor’ factor
  - Taking too long to get through was the single biggest reason for this difficulty (37%)
  - Almost matched by the 32% who said they had difficulty with ‘provider tried to convince me to stay with them’
- A quarter (23%) were contacted by their current provider. The largest reason for this was to be offered a deal (63% of those contacted), followed by ‘to tell me about their services’ (32%).
- More than two fifths (46%) of those who called to obtain a PAC were offered a deal/ discount on their existing package



## Summary: consumers who ‘considered’ switching

### Overall experience

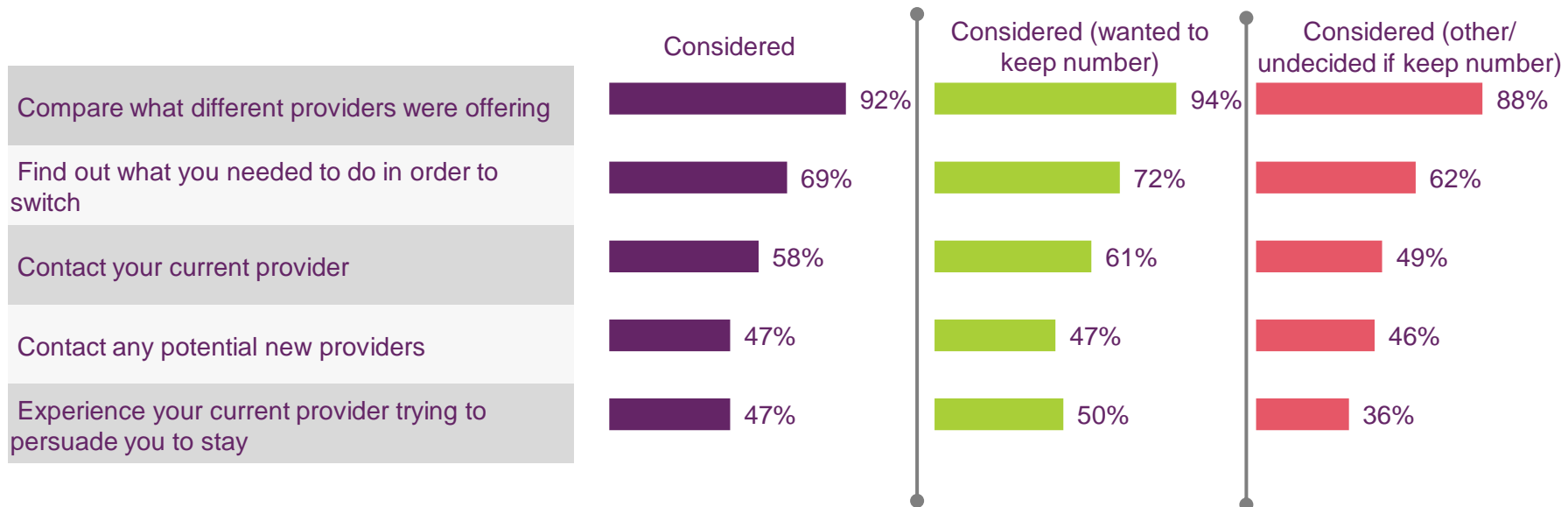
- Most consumers who considered but did not switch were satisfied with their decision to stay with their current provider (85%)
- The main factors contributing to the decision not to switch were ‘current provider is still the best deal/ cheapest’ (20% ‘main’ reason), and ‘I negotiated/ accepted a deal with my current provider’ (12% ‘main’ reason)
  - ‘I prefer to stay with trusted/ known provider’, coupled with ‘there wasn’t enough difference in cost to be worth switching’ were also commonly cited reasons for not switching (83% and 78% ‘major’/‘minor’ factor) although few in comparison mentioned either as ‘main’ reasons (5% for each)
- Bad experiences switching in other markets generally (33%) or the mobile market specifically (29%) were factors for a minority and were almost always not the ‘main’ reason for not switching.
  - difficulties obtaining the PAC was a factor for a minority (25%) and did not figure as the ‘main’ factor in not switching

# **CONSIDERING SWITCHING MOBILE PROVIDER: SUMMARY OF EXPERIENCE**



## Activities undertaken by *those that considered switching*

**Nine in ten compared what other providers were offering when they considered switching. Three in four looked at what they needed to do in order to switch**



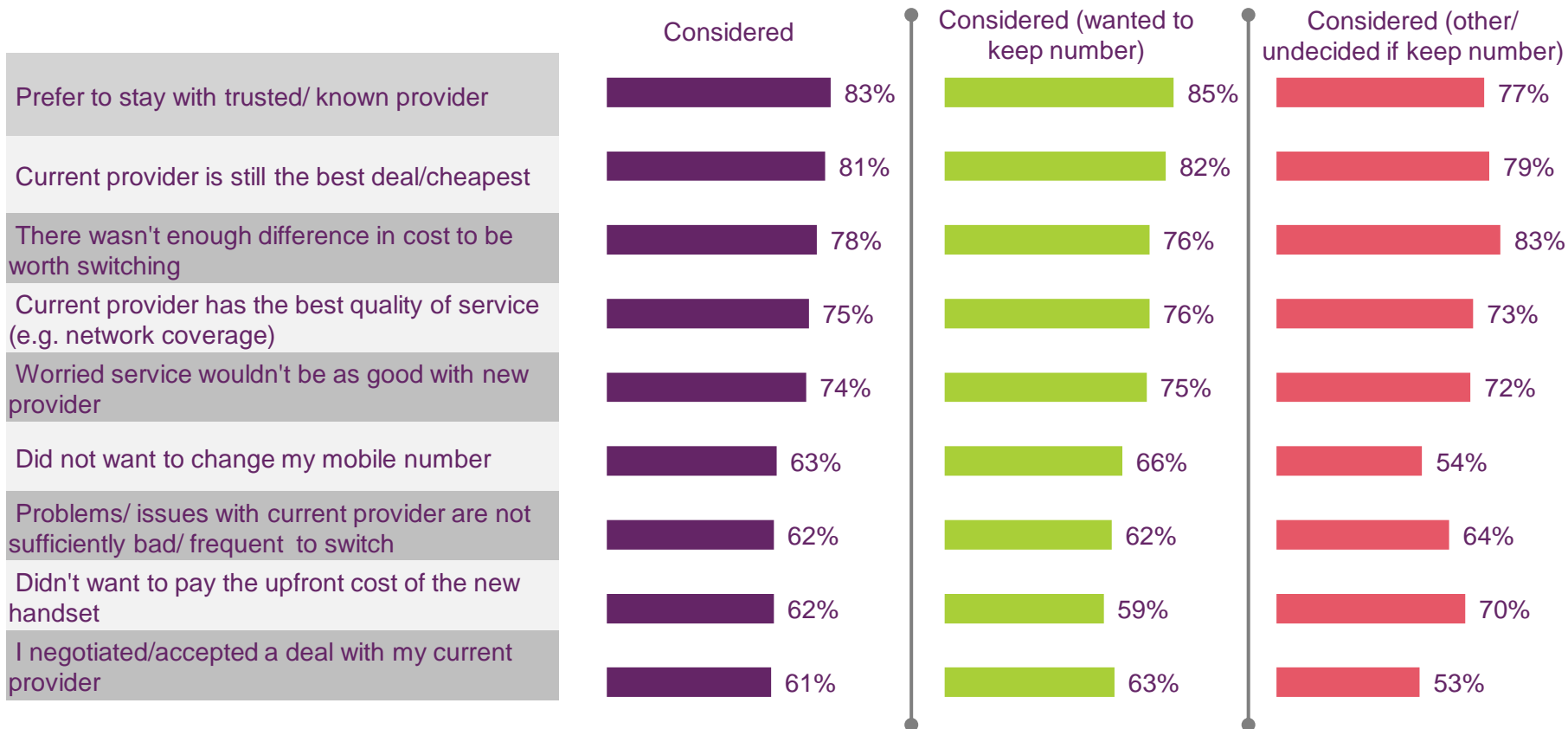
QA14 When you last changed mobile provider, did you...?

Base: All considered switching (500), All considered via PAC (394), Considered other/ undecided (106)

The approach to asking about experience of switching/remaining with existing provider is discussed in detail in 'About the research'



Those reporting a MAJOR/ MINOR factor in remaining with existing provider (1 of 3)  
Eight in ten said preferring to stay with ‘trusted/ known provider’ was a factor. The same proportion indicated that their current provider ‘is the best deal’



QA16A Which, if any, of the following were factors that made you decide to stay with your existing mobile provider?

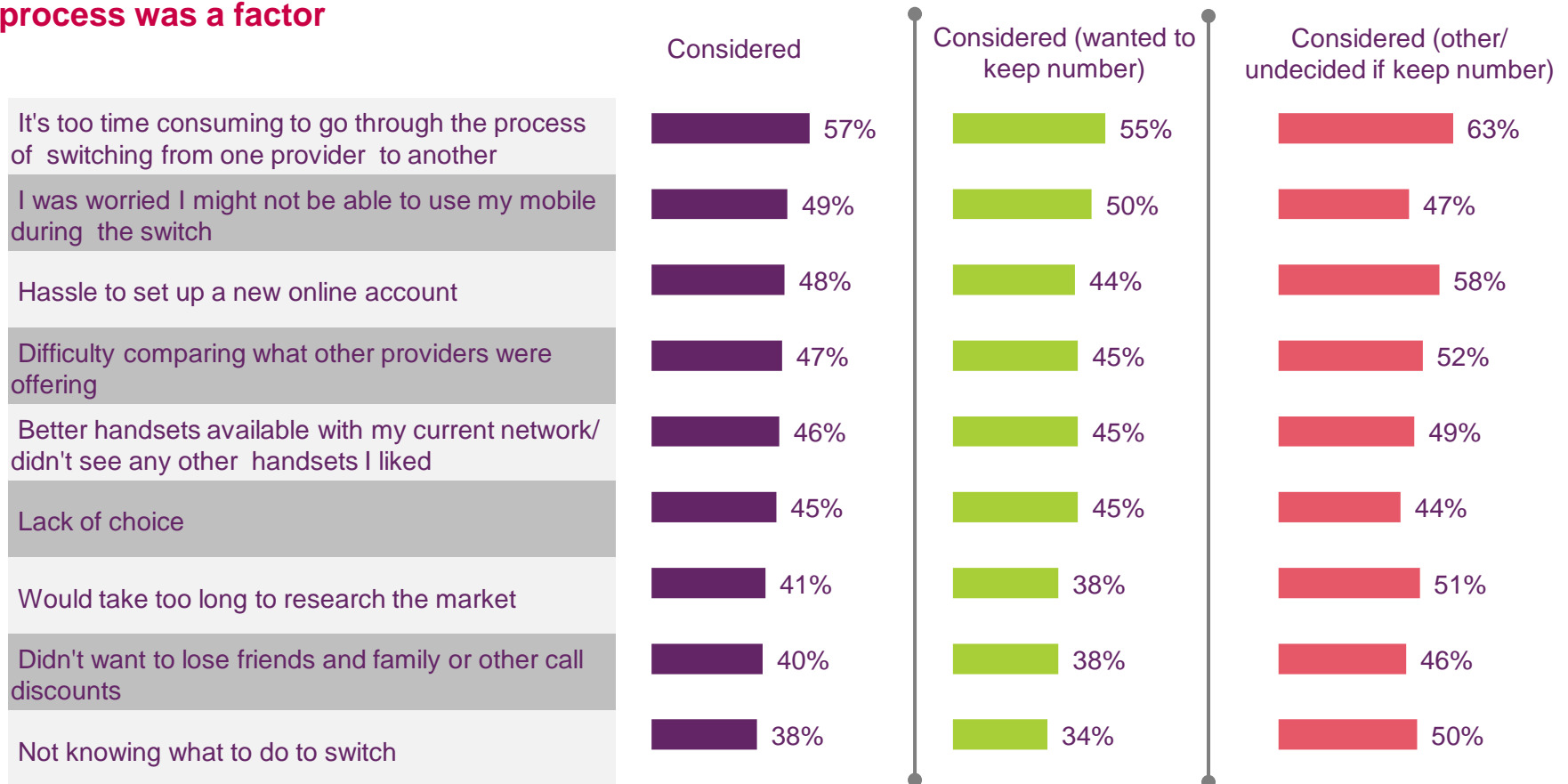
Base: All considered switching (500), All considered via PAC (394), Considered other/ undecided (106)

The approach to asking about experience of switching/remaining with existing provider is discussed in detail in 'About the research'





Those reporting a MAJOR/ MINOR factor in remaining with existing provider (2 of 3)  
Approaching three in five indicated that the fact it was too time-consuming to go through the process was a factor



QA16A Which, if any, of the following were factors that made you decide to stay with your existing mobile provider?

Base: All considered switching (500), All considered via PAC (394), Considered other/ undecided (106)

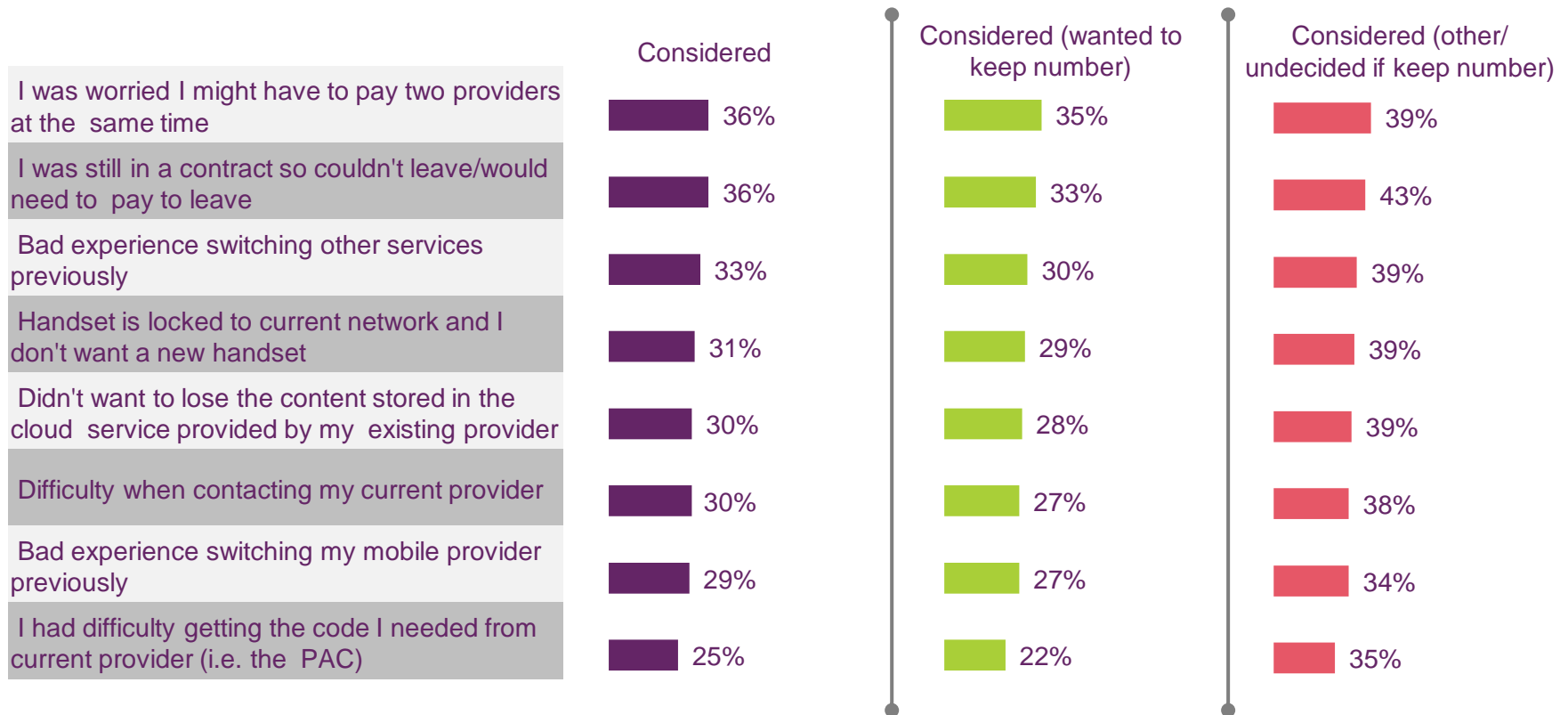
The approach to asking about experience of switching/remaining with existing provider is discussed in detail in 'About the research'





## Those reporting each activity as a MAJOR/ MINOR factor in remaining with their existing provider (3 of 3)

A quarter indicated that having difficulty getting the PAC was a factor



QA16A Which, if any, of the following were factors that made you decide to stay with your existing mobile provider?

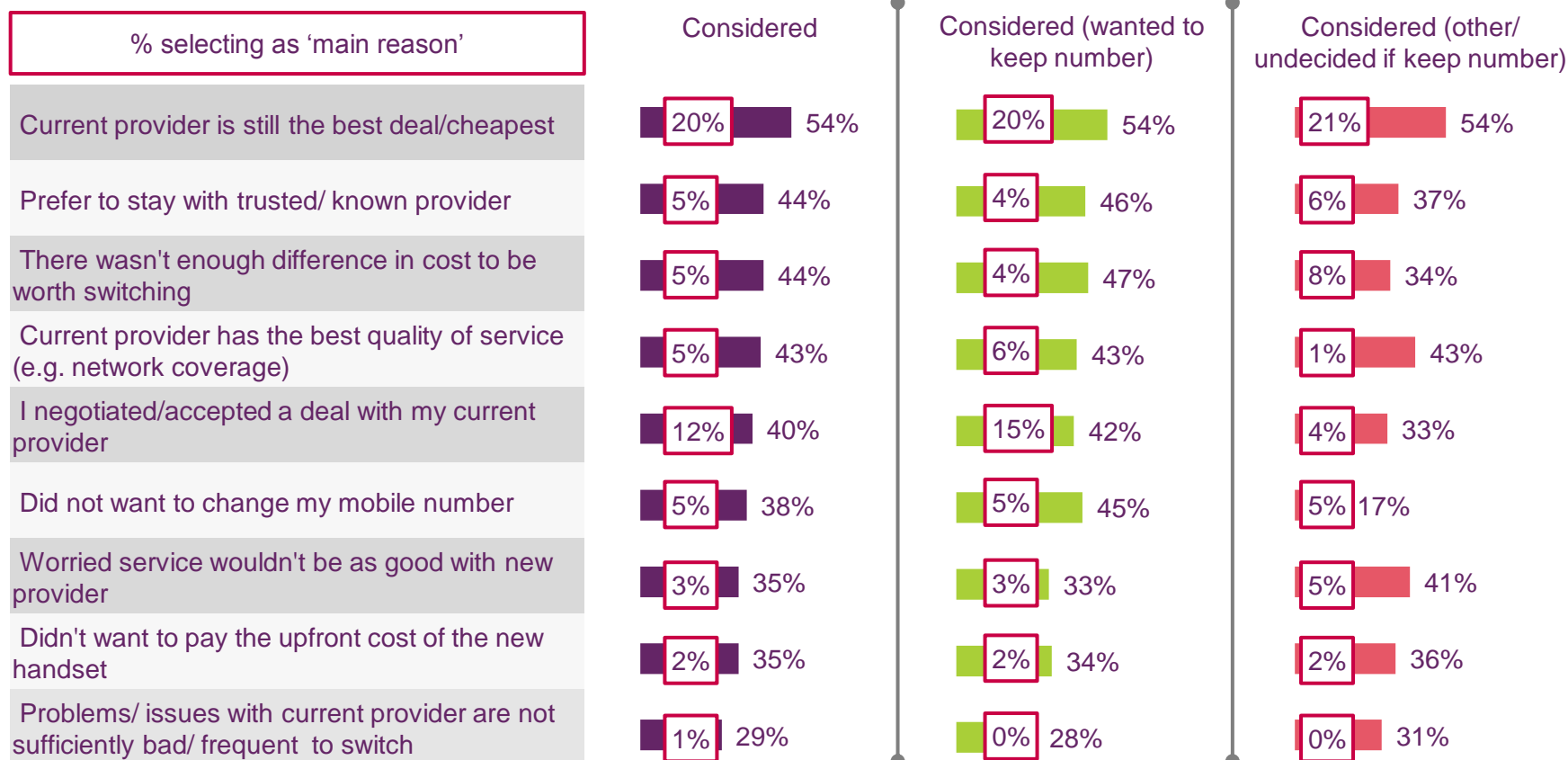
Base: All considered switching (500), All considered via PAC (394), Considered other/ undecided (106)

The approach to asking about experience of switching/remaining with existing provider is discussed in detail in 'About the research'



## Those reporting each activity as a MAJOR/ MAIN factor in remaining with existing provider (1 of 3)

**Current provider is still the best deal/ cheapest is a main factor for one in five**



QA16A Which, if any, of the following were factors that made you decide to stay with your existing mobile provider?

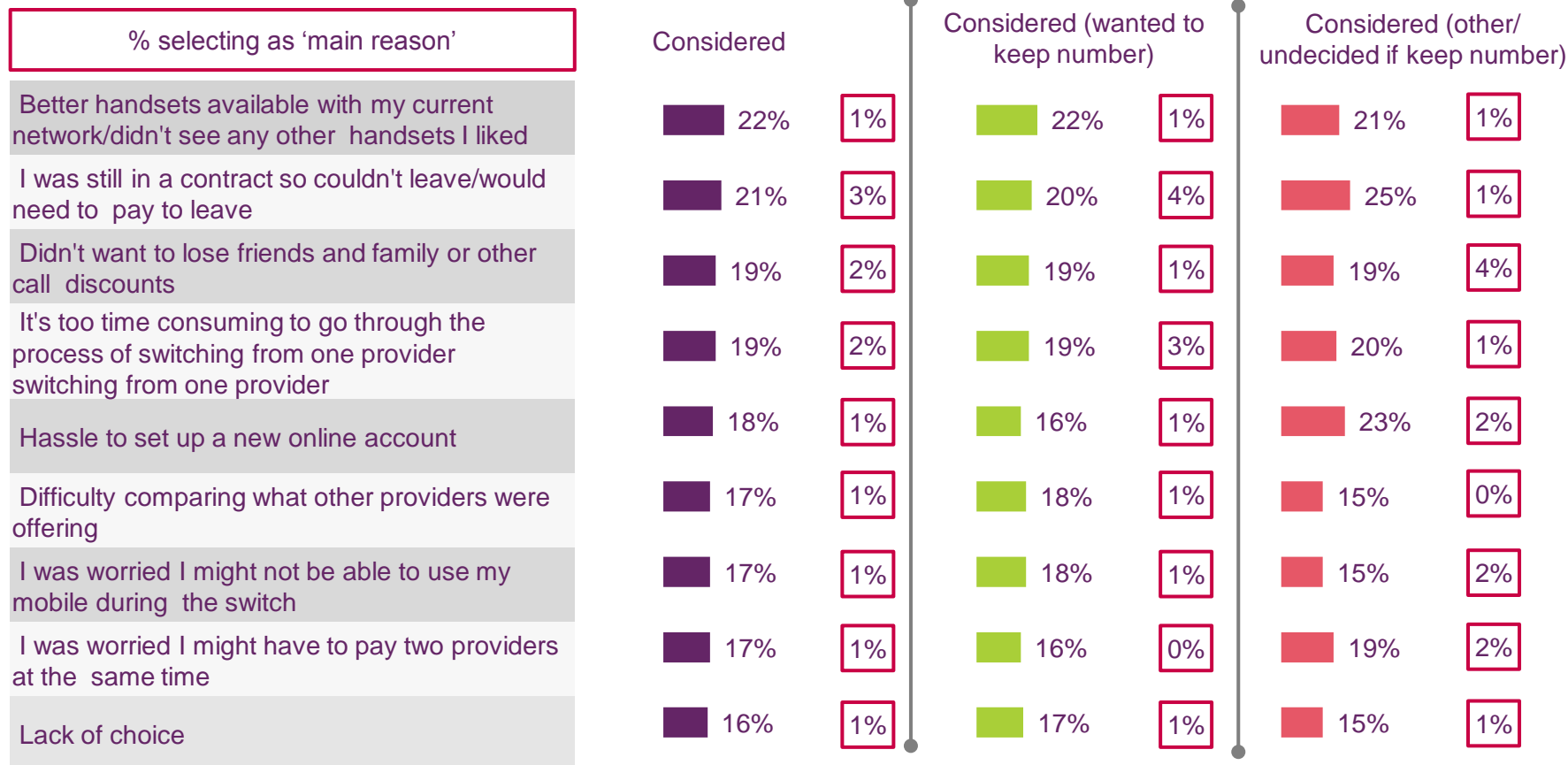
Base: All considered switching (500), All considered via PAC (394), Considered other/ undecided (106)

The approach to asking about experience of switching/remaining with existing provider is discussed in detail in 'About the research'



## Those reporting each activity as a MAJOR/ MAIN factor in remaining with existing provider (2 of 3)

**Finding it a 'hassle' to set up a new online account was a major factor for almost one in five**



QA16A Which, if any, of the following were factors that made you decide to stay with your existing mobile provider?

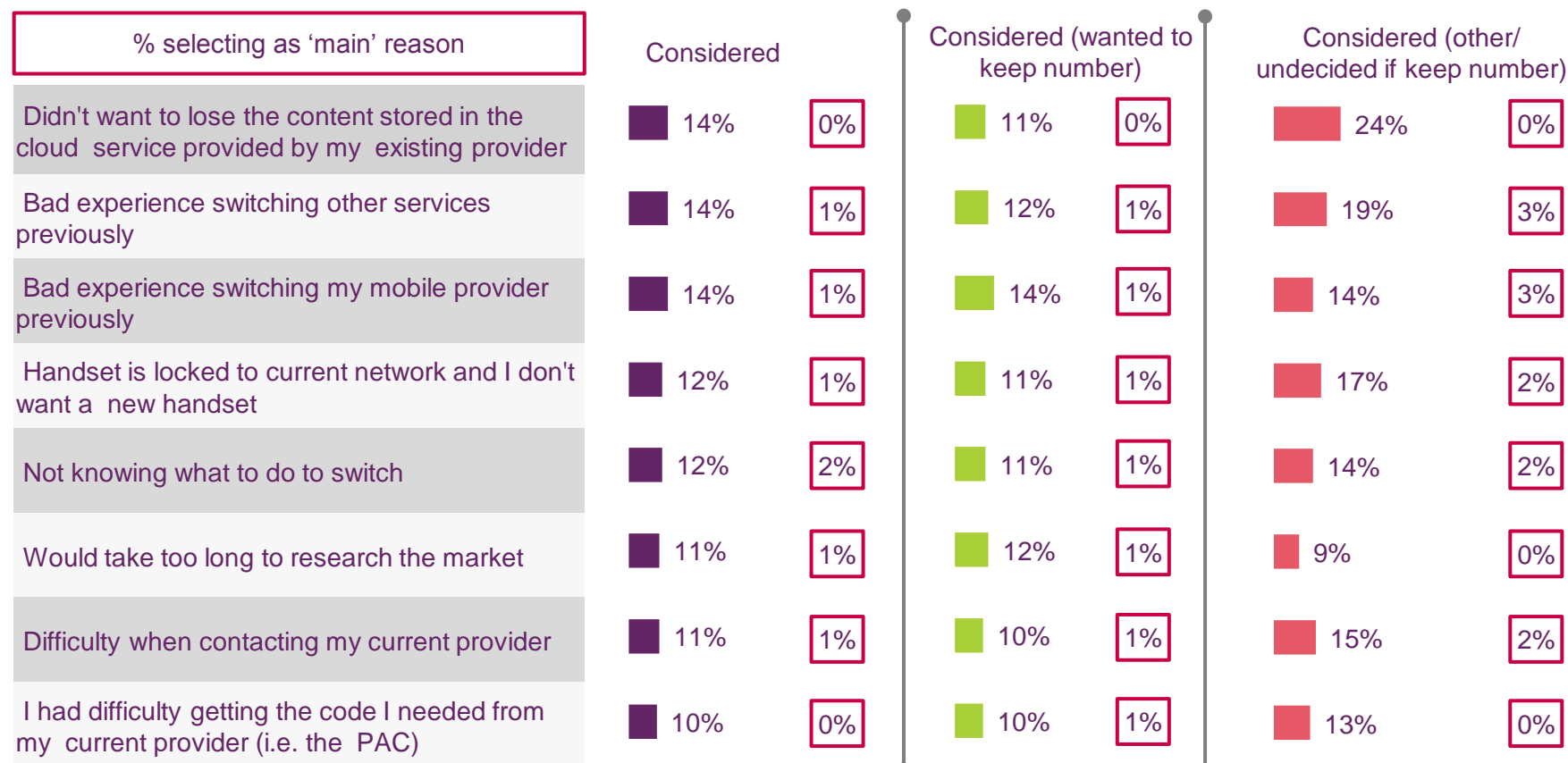
Base: All considered switching (500), All considered via PAC (394), Considered other/ undecided (106)

The approach to asking about experience of switching/remaining with existing provider is discussed in detail in 'About the research'



## Those reporting each activity as a MAJOR/ MAIN factor in remaining with existing provider (3 of 3)

One in ten indicated getting the PAC code was 'major difficulty'



QA16A Which, if any, of the following were factors that made you decide to stay with your existing mobile provider?

Base: All considered switching (500), All considered via PAC (394), Considered other/ undecided (106)

The approach to asking about experience of switching/remaining with existing provider is discussed in detail in 'About the research'



## Satisfaction with decision to stay with current provider

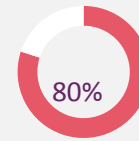
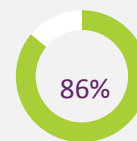
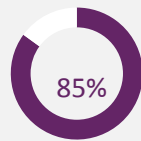
Four in ten were 'very satisfied' with their decision to stay with their current provider

Considered

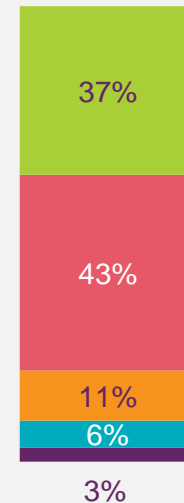
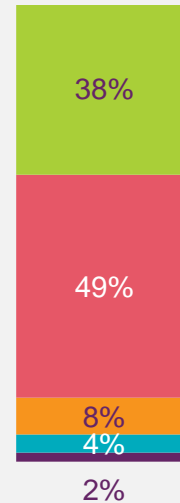
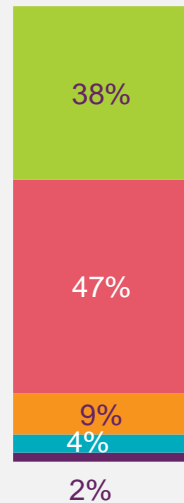
Considered (wanted to keep number)

Considered (other/ undecided if keep number)

All satisfied



- Very satisfied
- Fairly satisfied
- Fairly dissatisfied
- Very dissatisfied
- Don't know



QE7 Overall, how satisfied are you with your decision to stay with your current provider  
Base: All considered (500), Considered via PAC (394), Considered other/ undecided (106)



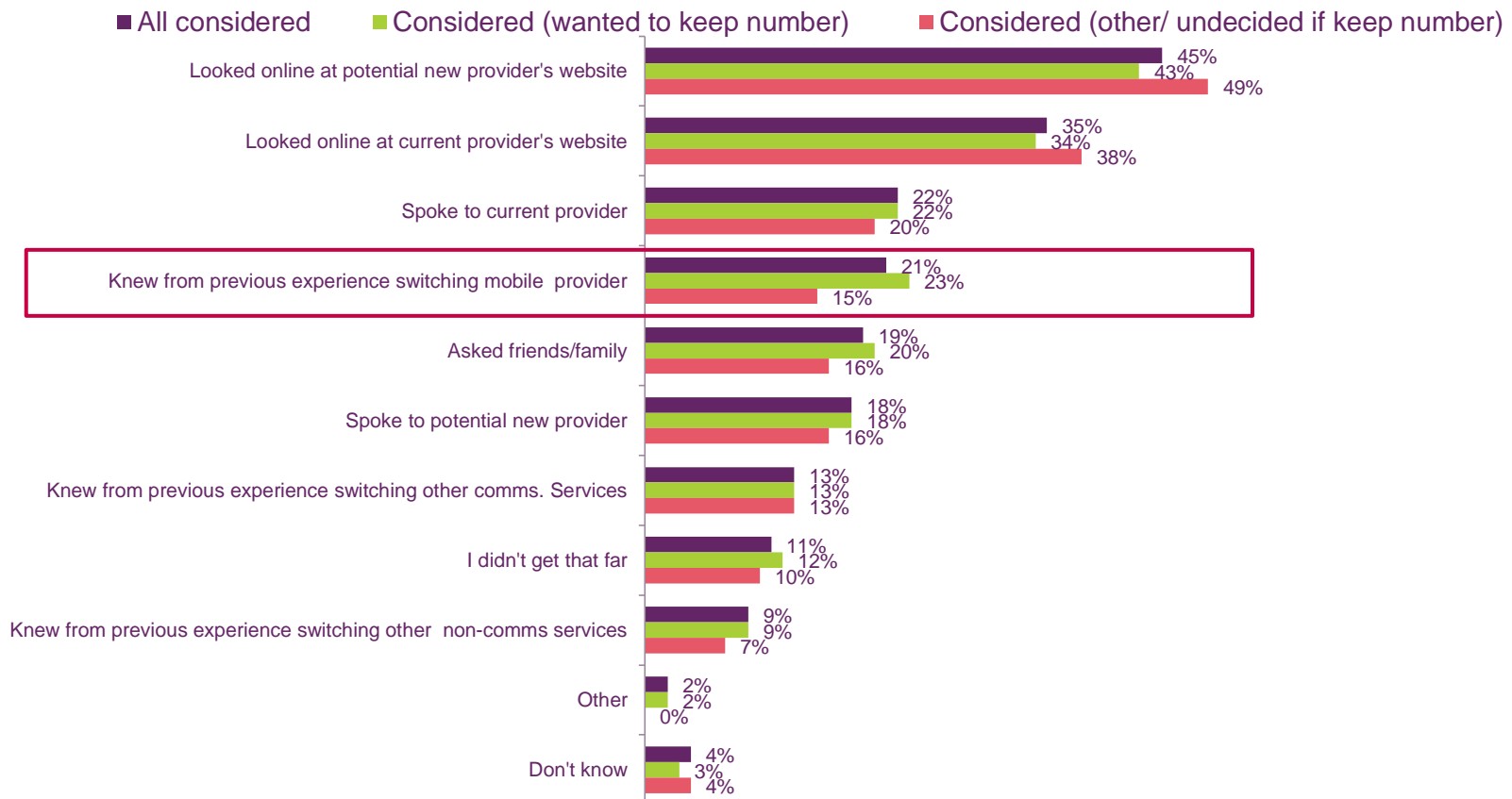
# CONSIDERING SWITCHING MOBILE PROVIDER: JOURNEY





## How found out what needed to do to switch

**Looking online at potential provider's website was the most common means of finding out what to do to switch**



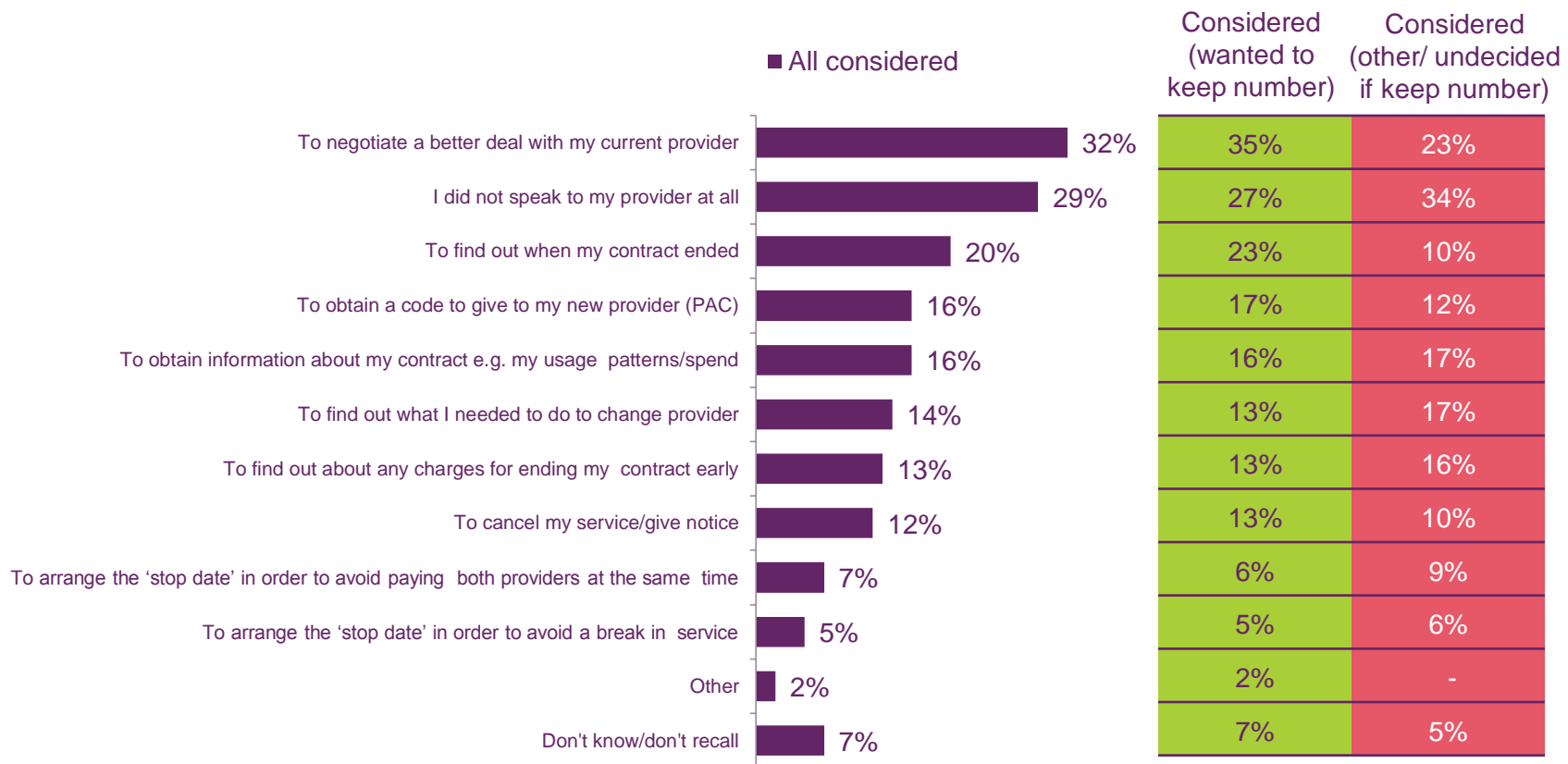
QB6 How did you find out what you needed to do in order to switch?

All considered switching (500), All considered switching via PAC (394)/ All considered other/ undecided (106)



## Reasons for contacting current provider when considering switching

### A third contacted their current provider in order to negotiate a better deal

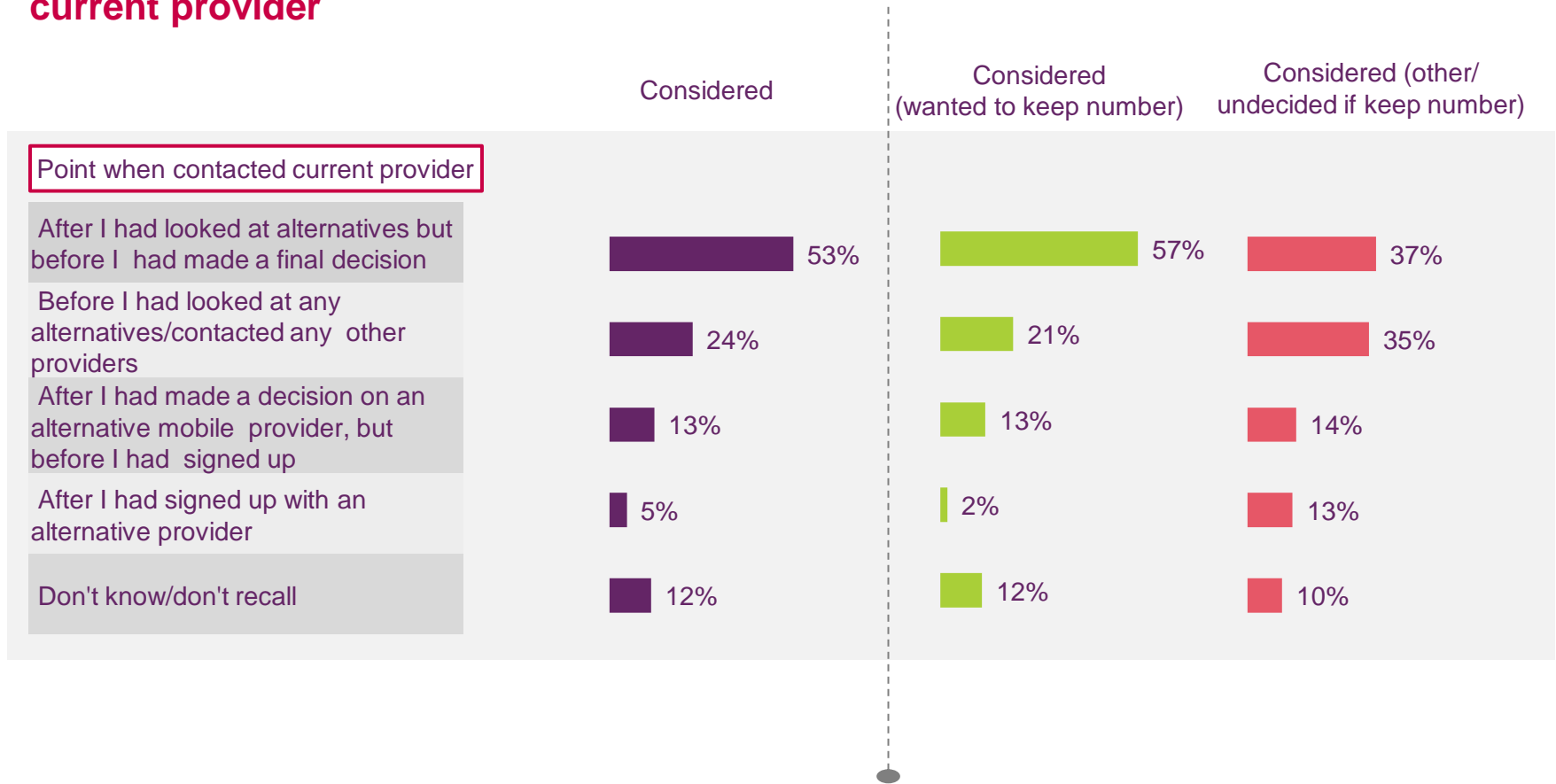


QC1 When you were thinking about switching did you contact your current provider for any of the following reasons?  
All considered switching (500), All considered switching via PAC (394)/ All considered other/ undecided (106)



## Timescale for contacting current provider

**Very few wait until they have signed up to a new service before they contact their current provider**



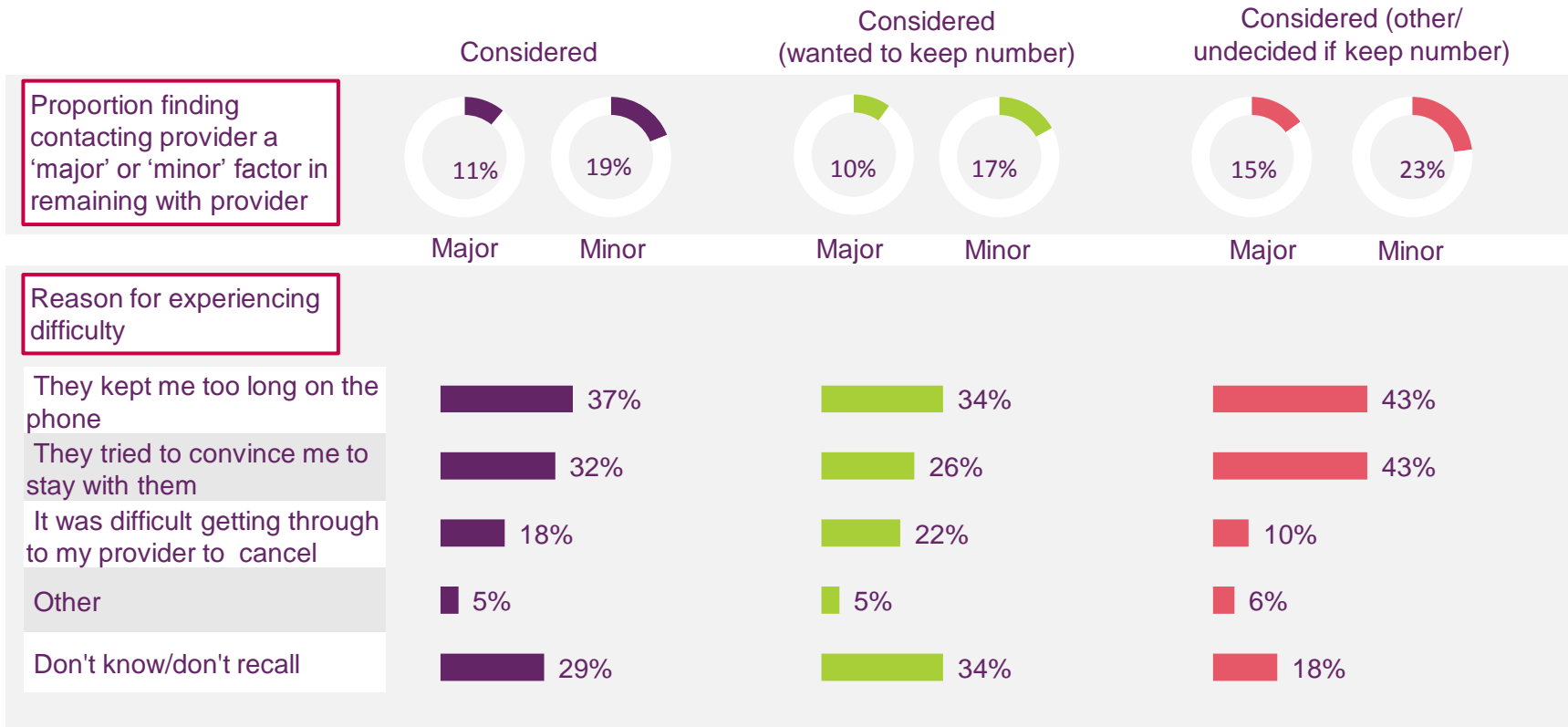
QC1 When you were thinking about switching did you contact your current provider for any of the following reasons? QC2 And at what point did you contact your current mobile provider?

All considered switching (500), All considered switching via PAC (394)/ All considered other/ undecided (106)



## Experience of contacting current provider to leave

**Almost a third stated difficulty contacting their current provider was a 'major or minor' factor in deciding to stay with their existing provider**



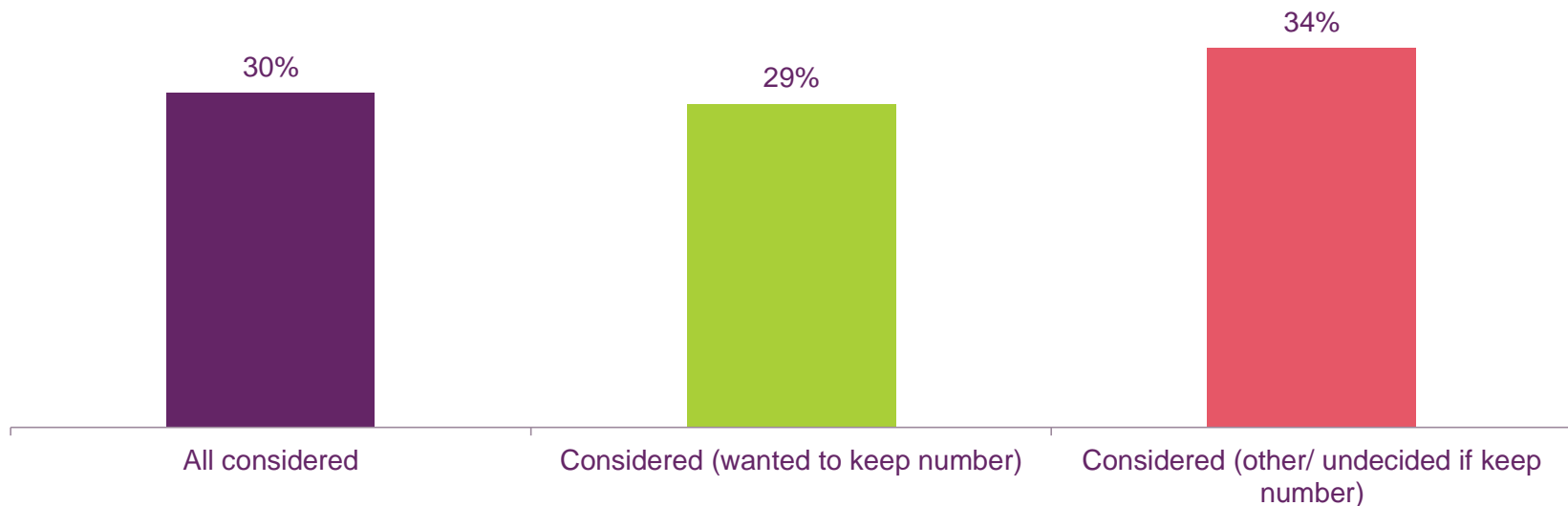
QA16A And which, if any, were factors that made you decide to stay with your existing mobile provider...? / QA16c What was difficult about contacting your current provider?

Base: All considered switching (500), All considered switching via PAC (394)/ All not considered via PAC (106)/ All who had difficulty contacting their current provider: considered switching (142), considered via PAC (105), considered other/ not known (37\*\*) \*\*Caution very small base



## Whether told about any provider specific benefits when called current provider to switch

**3 in 10 were told about benefits that they might lose by switching provider**



QB7 When you contacted your provider to switch, did they tell you about any provider-specific benefits (such as friends and family discounts, 2 for 1 cinema tickets) that you might lose by switching away from them?

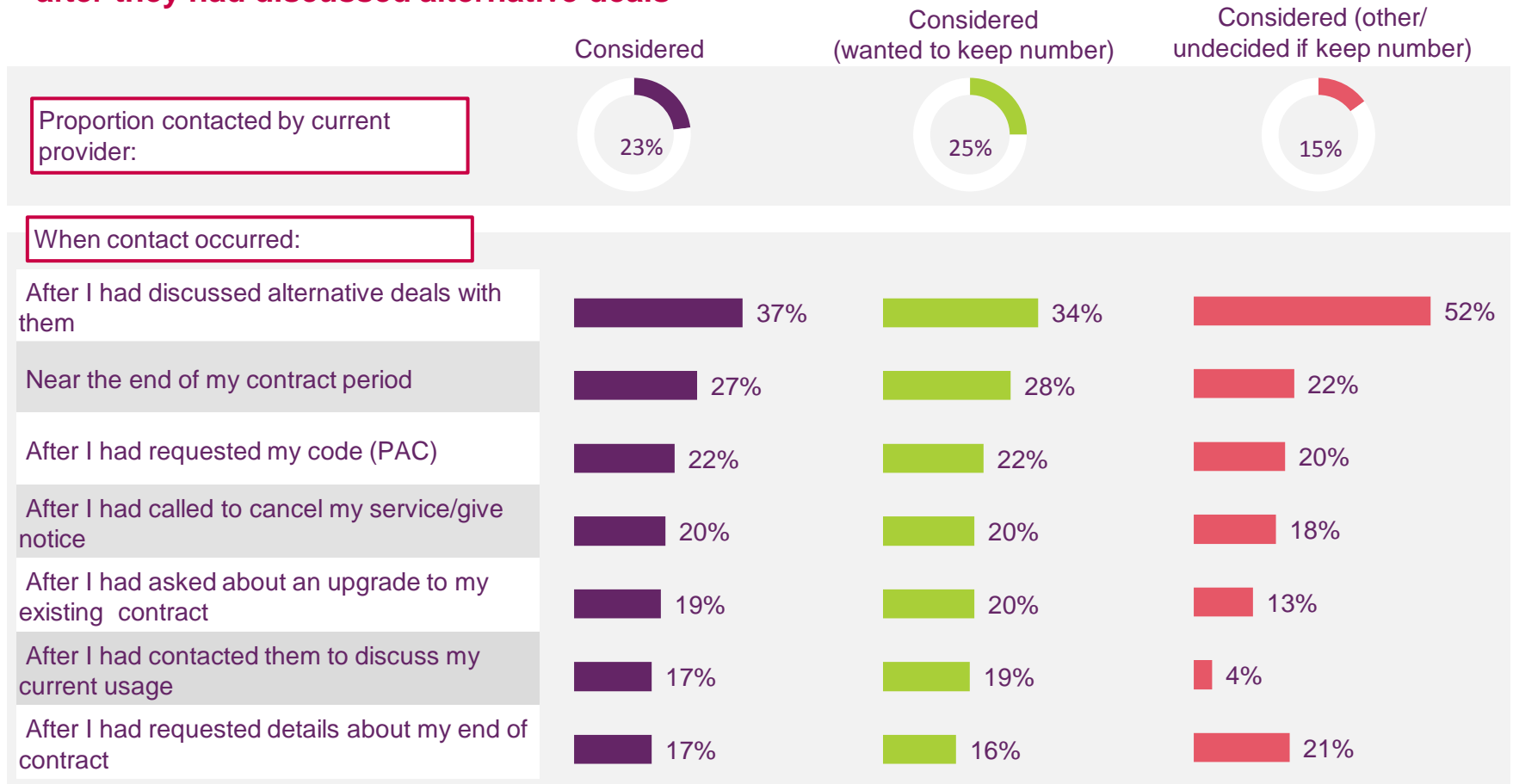
Base: All considered switching (500), All considered switching via PAC (394)/ All not considered via PAC (106)





## Contact from current provider (when occurred)

**A quarter were contacted at some point when they considered switching. For two in five this was after they had discussed alternative deals**



QC5 Did your current mobile provider contact you at any point when you were considering switching? (e.g. via text, phone call or a letter etc.)/ QC6 At what point did your current mobile provider contact you?

Base: All considered switching (500), All considered via PAC (394), Considered other/ don't know (106)

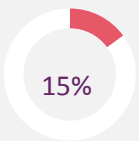
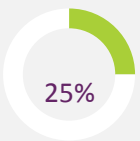
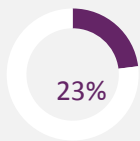


# Contact from previous provider (reason)

For two in three the reason for contact was in order to be offered a deal

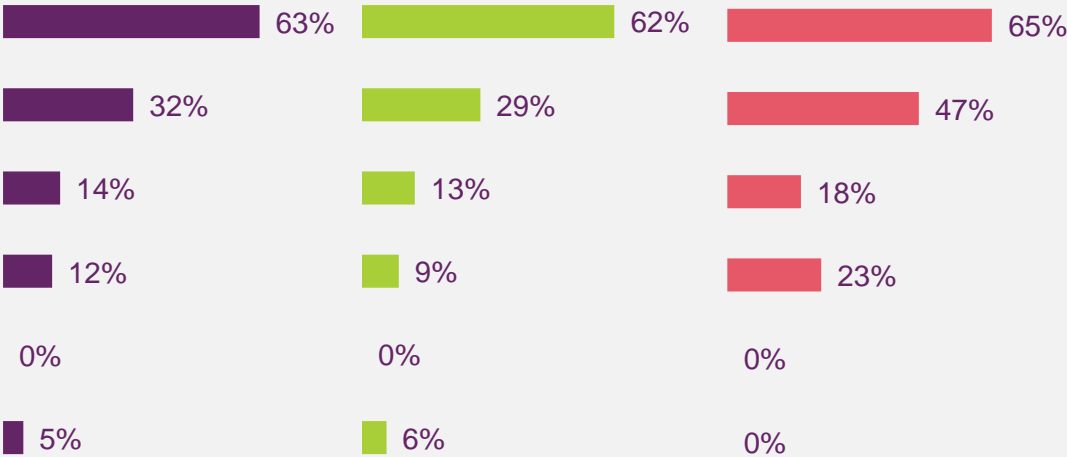
Considered                      Considered (wanted to keep number)                      Considered (other/ undecided if keep number)

Proportion contacted by previous provider:



Reason contact occurred:

- To offer me a deal
- To tell me about their services
- To give me my PAC
- To tell me about charges I needed to pay for ending my contract early
- Other
- Don't know/don't recall



QC5 Did your current mobile provider contact you at any point when you were considering switching? (e.g. via text, phone call or a letter etc.) QC7 Do you recall why your current mobile provider contacted you?  
Base: All considered switching (500), All considered via PAC (394), Considered other/ undecided (106)

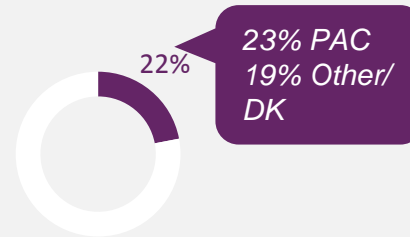
# **CONSIDERING SWITCHING MOBILE PROVIDER: PAC PROCESS**



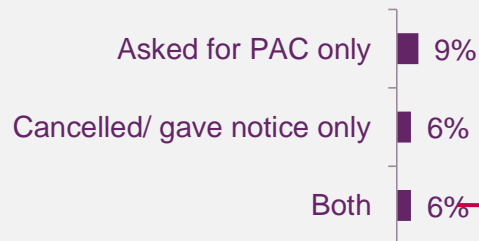
## Whether asked for PAC/ cancelled service

Almost a quarter asked for PAC or cancelled their service when contacting provider

Asked for PAC **or** cancelled service when contacted current provider thinking about switching:



What asked for:



Of those doing both..

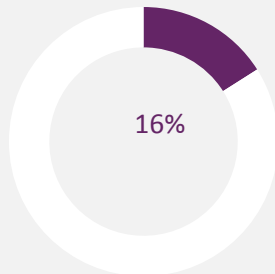
3% did at the same time  
1% did not  
1% don't know



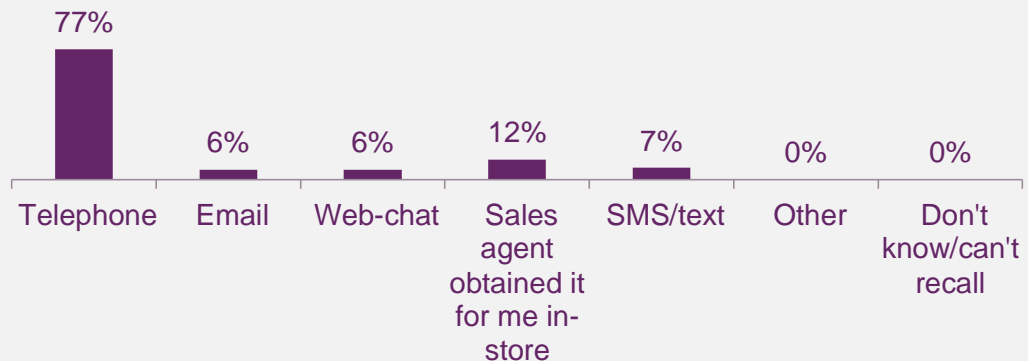
## Method of contact used to obtain PAC

Three in four asked for their PAC code via telephone

All who contacted previous provider to request PAC



Contact method used to request PAC



QC1 When you were thinking about switching did you contact your current provider for any of the following reasons? / QE1 You said earlier that you requested a code (a PAC) from your current provider>, how did you contact your provider to request the code?

Base: All considered switching (500)/ All considered that requested PAC (73)

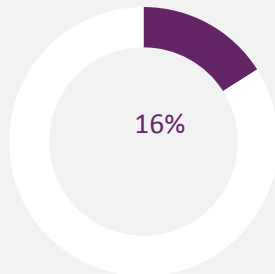




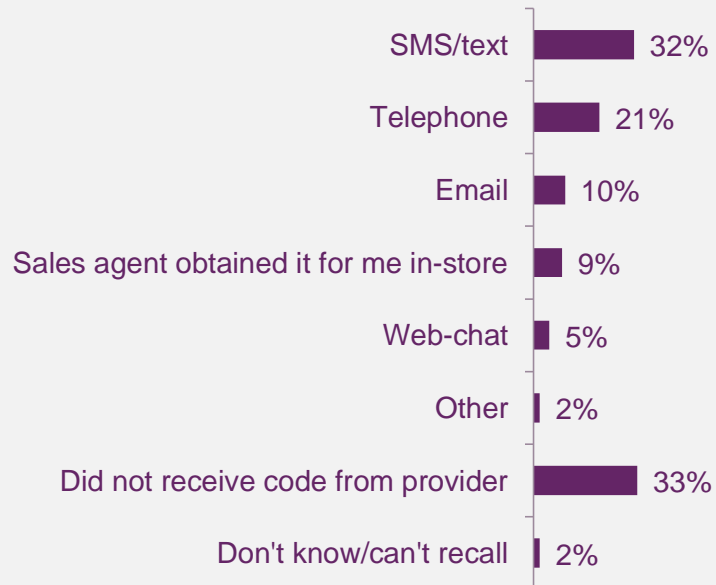
## Means of receiving PAC

**SMS and telephone were the most common ways of receiving the PAC**

All who contacted  
previous provider to  
request PAC



Contact method used to  
request PAC



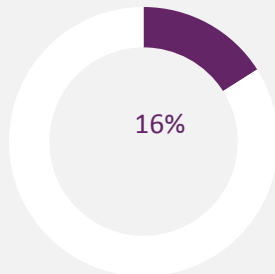
QC1 When you were thinking about switching did you contact your current provider for any of the following reasons? / QE2 And how did you actually receive the code?  
Base: All considered switching (500), Considered and requested PAC (73)



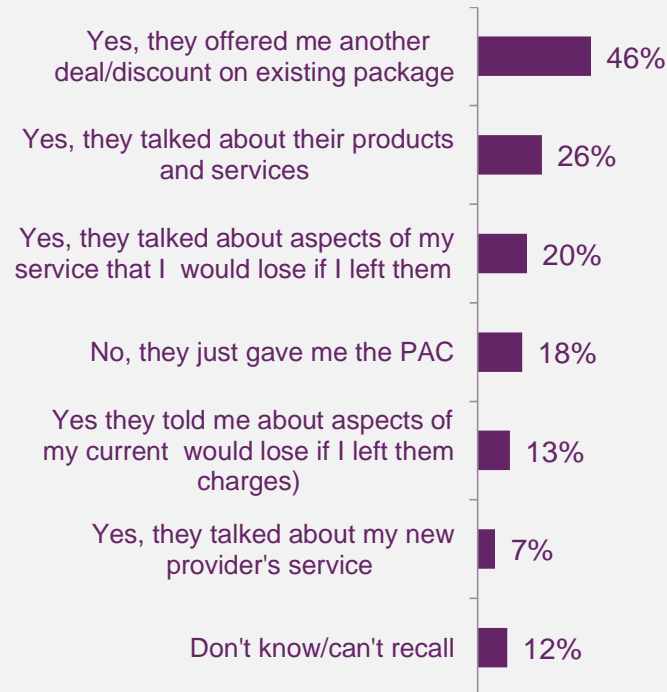
## What else provider discussed when consumer called to obtain PAC

**Provider discussed something other than the PAC when most called to request it**

All who contacted previous provider before switch to request PAC



Other areas discussed when called to request PAC



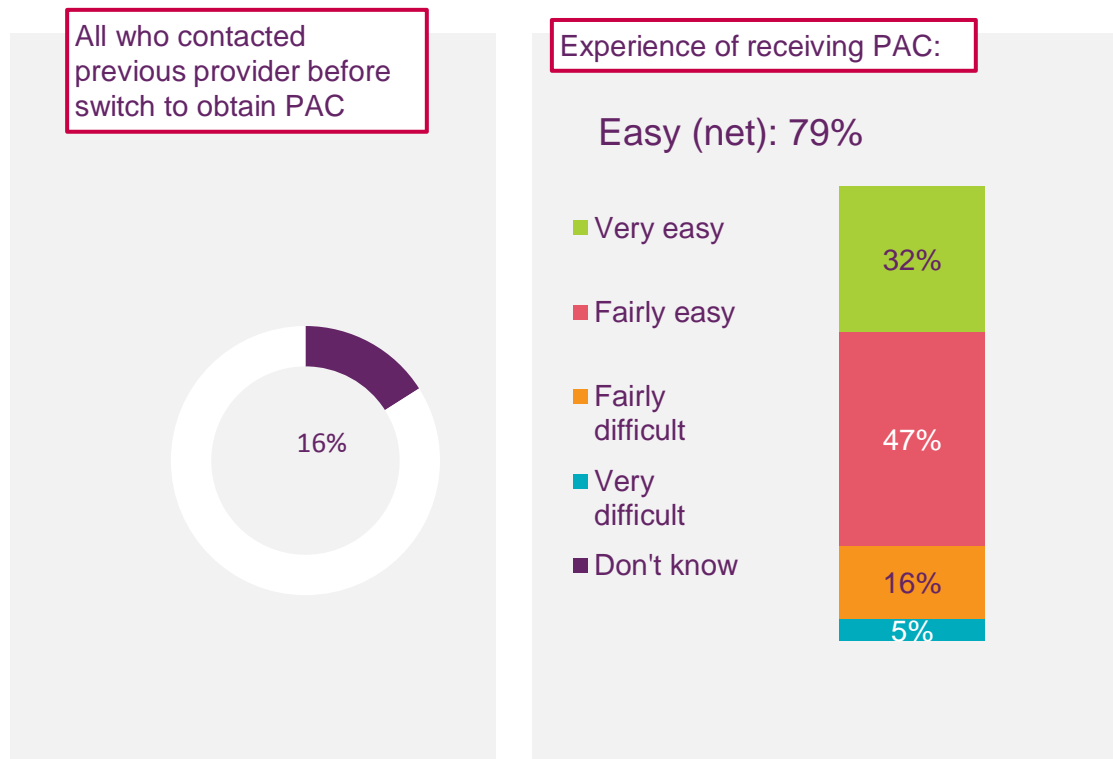
QC1 When you were thinking about switching did you contact your current provider for any of the following reasons? / QE3 Did your current provider talk to you about anything else when you contacted them to obtain the code?

Base: All considered switching (500), Considered and requested PAC (73)



## Experience of obtaining the PAC

For four in five, the experience of obtaining the PAC was 'easy'



QC1 When you were thinking about switching did you contact your current provider for any of the following reasons? / QE4 How easy, or difficult, did you find it to obtain your PAC? / QE5B And which, if any, of the following were reasons you felt it was difficult to get the code?

Base: All considered switching (500), Considered and requested PAC (73)



## What was difficult about getting the code

*EE have the worst customer service*  
**Male, 66**

*I had to call many times*  
**Female, 36**

*The current network provider was trying to persuade me to stay*  
**Male, 27**

*I expected it to be more or less instant but got nothing from them for months and then it said I had to use it with in a certain time frame. By this time I had given up was too much hassle*  
**Female, 57**

*I needed the code for a different reason which I told EE when I phoned up and told them that I wasn't planning on changing provider. However they ignored this and were very reluctant to give me the PAC and instead kept offering me new deals and telling me about what I would be losing out on. It took over 15 minutes to get the code.*  
**Female, 24**

*Trying to explain what I wanted*  
**Female, 50**

*It takes time*  
**Female, 39**

*Trying to get to speak to someone*  
**Female, 63**

*Service provider not very co-operative*  
**Female, 50**

# NON-SWITCHER/NON-CONSIDERER





## Summary: 'Non-switcher/non-considerer' consumers

### Who they are

- Non-switcher/non-considerer consumers accounted for around two-thirds (68%) of mobile phone users in our sample and most of these had not considered switching provider in any way in the last 12 months (52%). There was also a group of consumers who had considered switching but that had not started looking (16%) who are classed with this group because they did not go far enough through the switching process to have truly considered making a provider switch
- 'Non-switcher/non-considerer' consumers were almost as likely to be using PAYG (41%) as they were a handset and monthly contract (44%), with a minority (14%) SIM only

### Why they are non-switcher/non-considerers

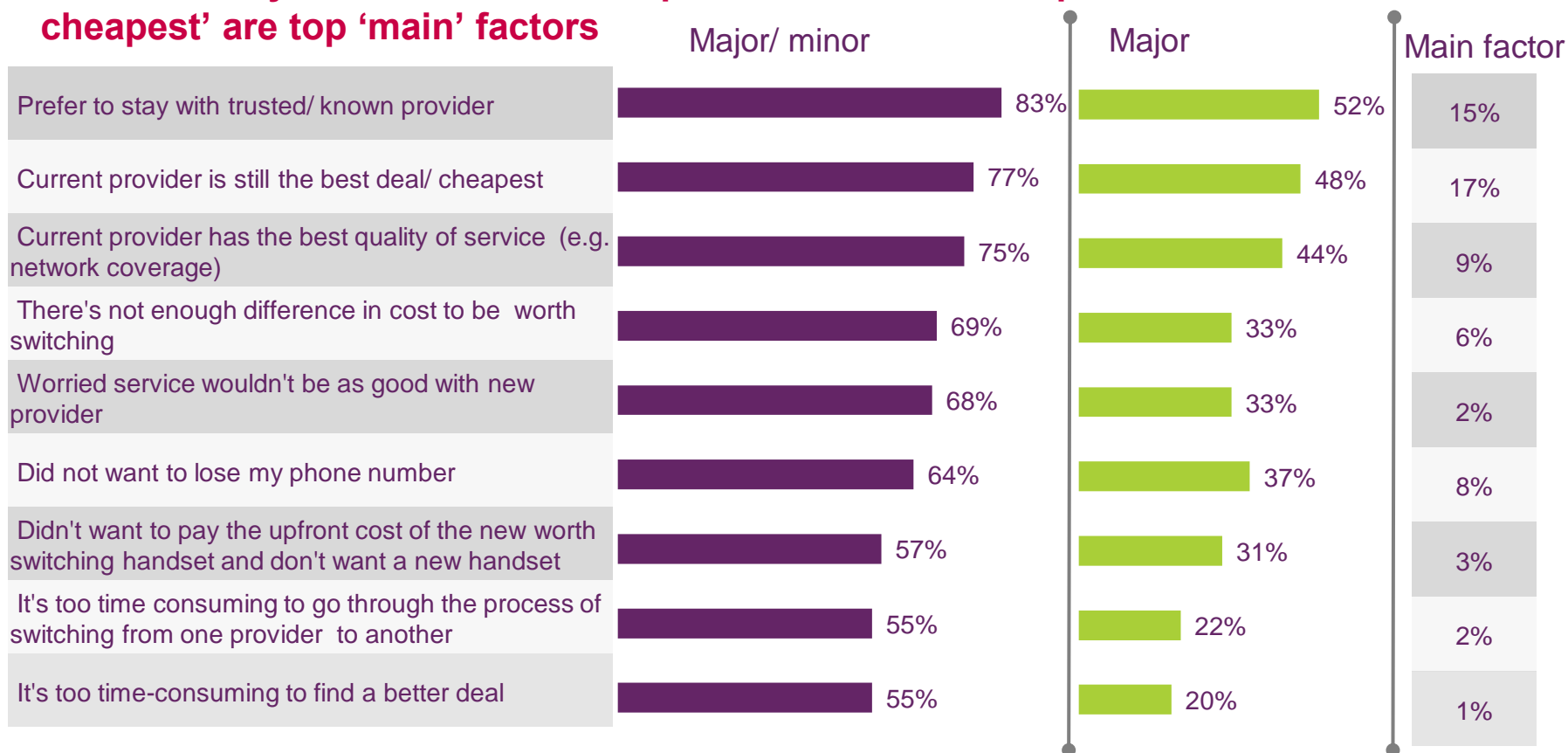
- 'Prefer to stay with trusted/ known provider' and 'current provider is still the best deal/ cheapest' were the most commonly chosen 'main factors' in remaining with the existing provider and not considering a switch (15% and 17% respectively)
- Other relatively high scoring factors were 'current provider has the best quality of service, e.g. network coverage' (9% select as 'main' factor), and 'did not want to lose my phone number' (8%, rising to 15% for those with a contract)
- At the other end of the scale, bad experience with other switches, or a perception of 'lack of choice' were cited by fewer than one-in-ten as 'major' reasons in remaining with their current provider

# **NON-SWITCHER/NON-CONSIDERER: SUMMARY OF EXPERIENCE**



Those reporting each as a factor *in remaining with existing provider and not considering a switch* (1 of 3)

**‘Prefer to stay with trusted/ known provider’ and ‘current provider still the best/ cheapest’ are top ‘main’ factors**



QA17A Which, if any, of these are factors why you have not recently switched or actively considered switching your current mobile network provider to another provider?

Tables ordered on major/minor

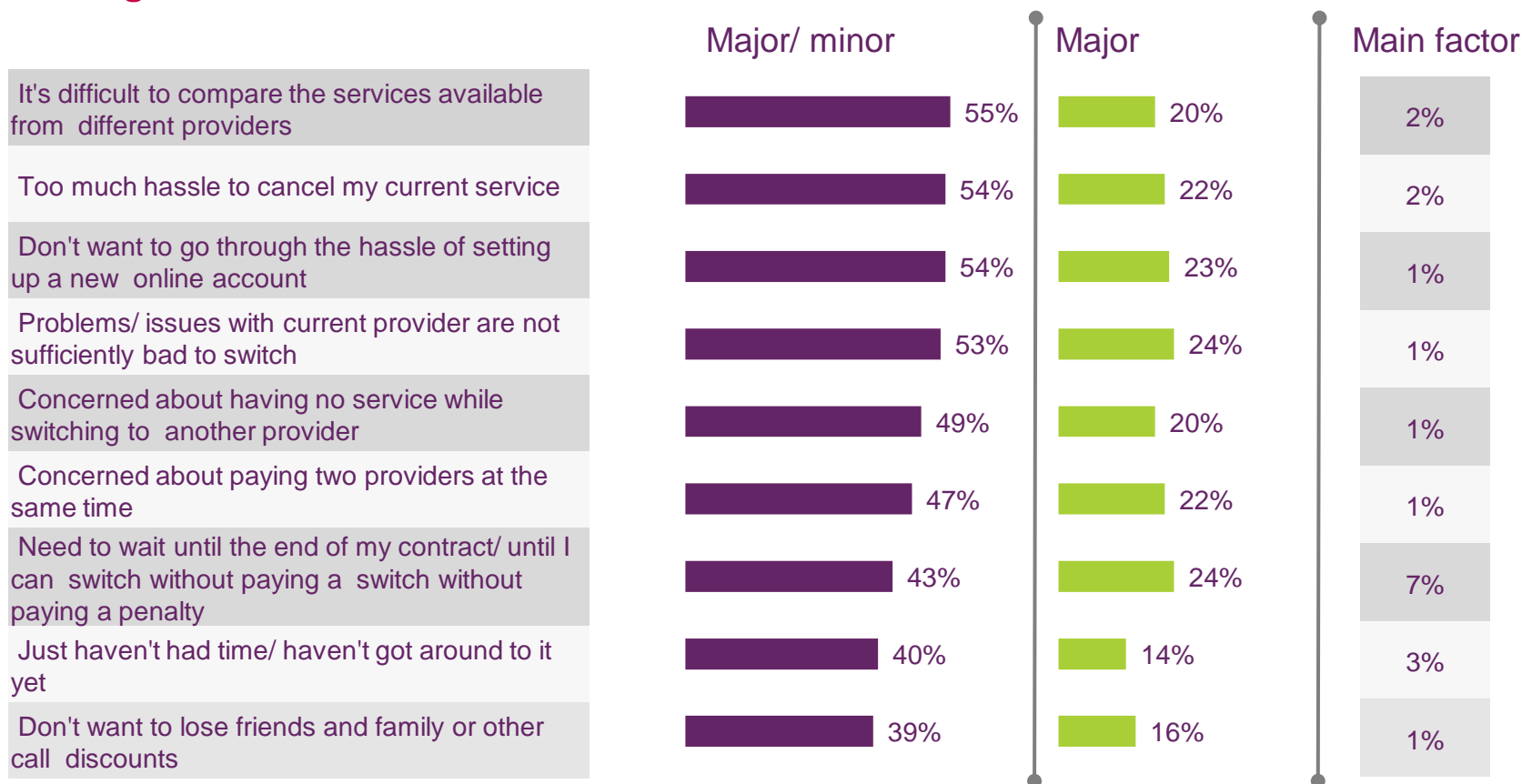
Base: All Non-switcher/non-considerer (4033)

The approach to asking about experience of switching/remaining with existing provider is discussed in detail in 'About the research'



Those reporting each factor as a factor *in remaining with existing provider and not considering a switch* (2 of 3)

**Needing to wait until the end of contract was a 'main' factor for 7%**



QA17A Which, if any, of these are factors why you have not recently switched or actively considered switching your current mobile network provider to another provider?

Tables ordered on major/minor

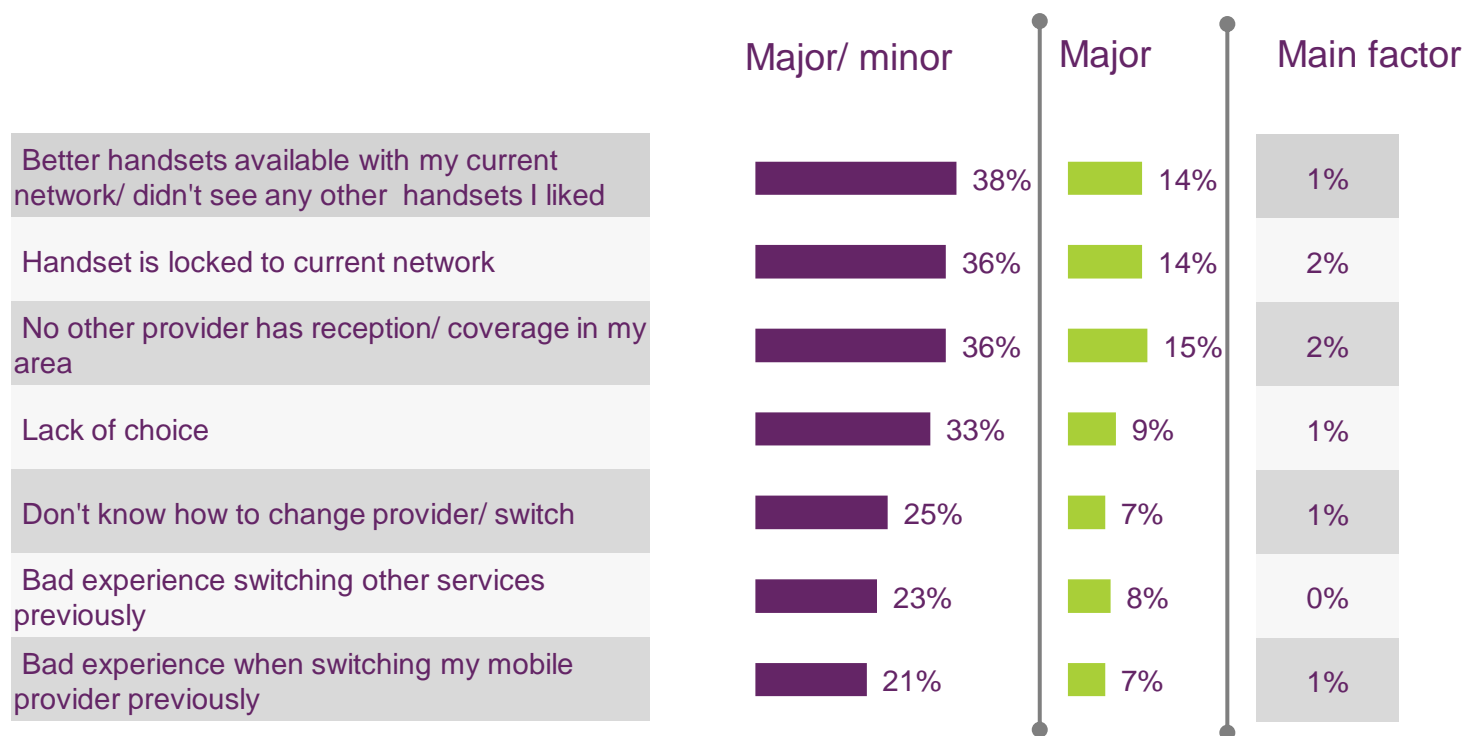
Base: All Non-switcher/non-considerer (4033)

The approach to asking about experience of switching/remaining with existing provider is discussed in detail in 'About the research'



Those reporting each factor as a factor in remaining with existing provider and *not considering a switch* (3 of 3)

**Bad experience switching in this or other markets does not figure as a factor for most**



QA17A Which, if any, of these are factors why you have not recently switched or actively considered switching your current mobile network provider to another provider?

Tables ordered on major/minor

Base: All Non-switcher/non-considerer (4033)

The approach to asking about experience of switching/remaining with existing provider is discussed in detail in 'About the research'



# APPENDIX

## **Further demographic/attitudinal analysis:**

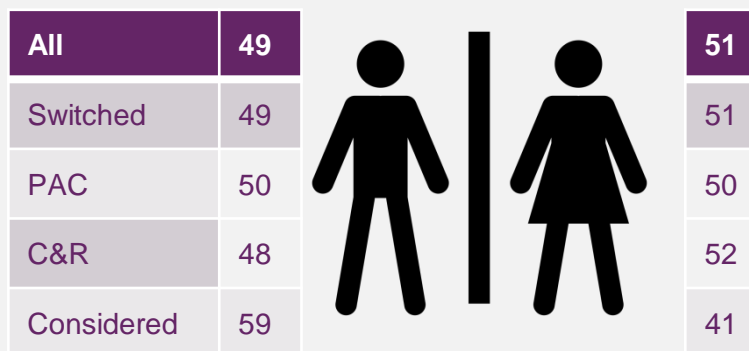
- Demographics and attitudinal profiles
- Profile in mobile usage

# DEMOGRAPHIC AND ATTITUDINAL PROFILE OF GROUPS

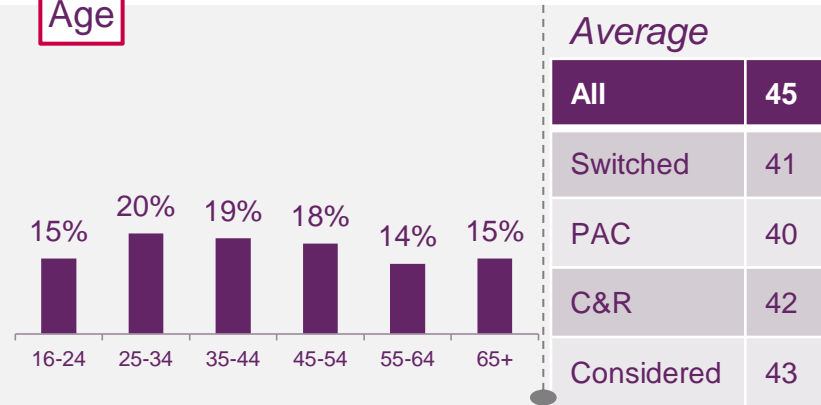
## Demographic of switched and considered switching

Age, gender and social grade differences are subtle between the different groups

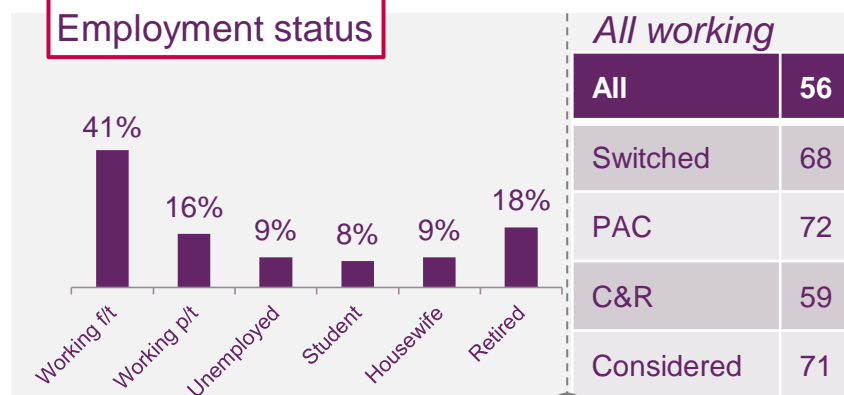
### Gender



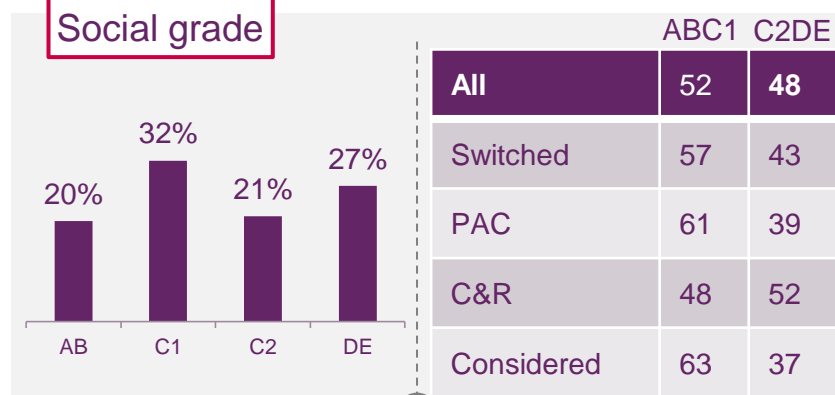
### Age



### Employment status



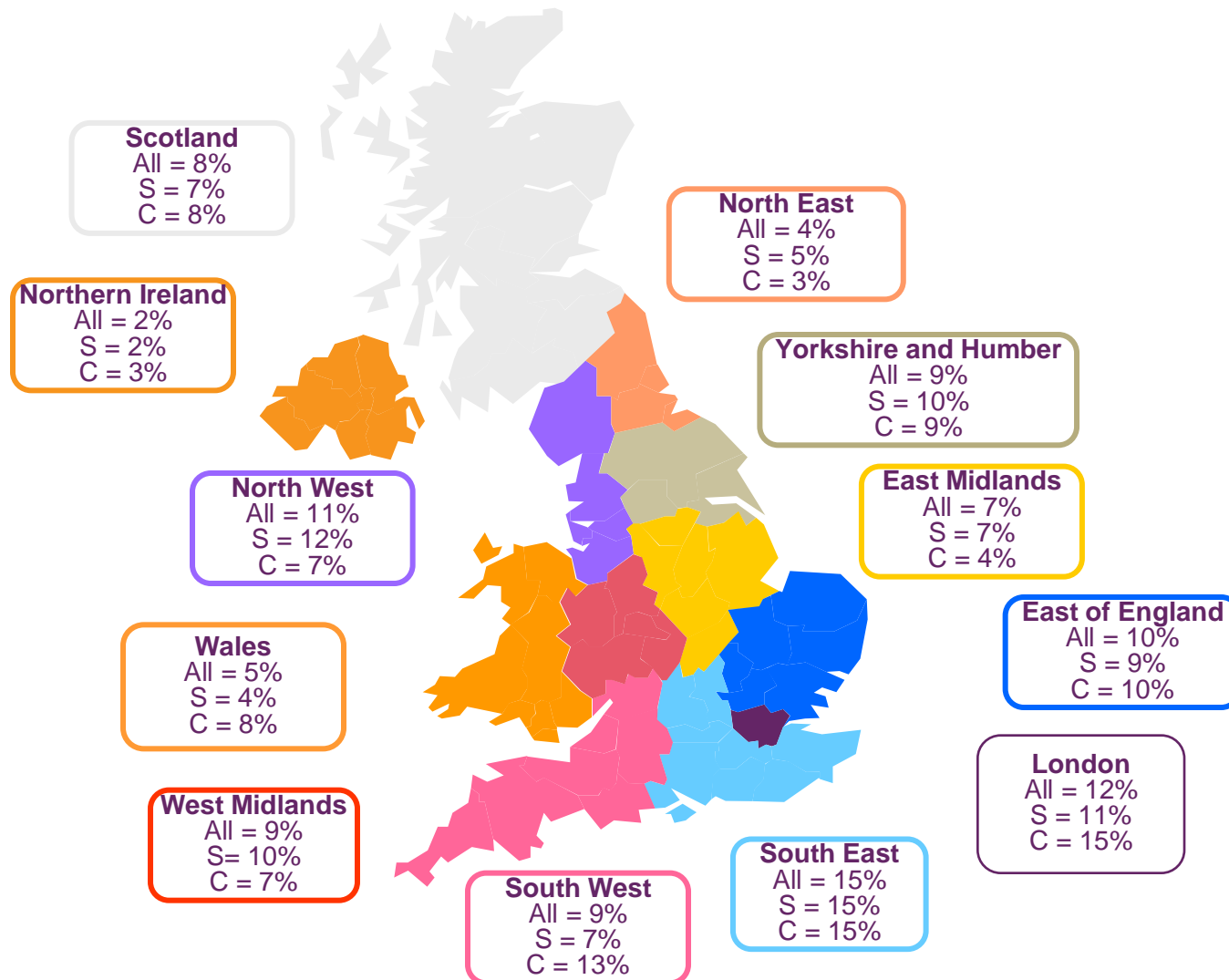
### Social grade



QA1/2/3/4

Base: All respondents (6762) / All switched last 18m (1306) / All switched via PAC (705) / All switched via C&R (601), All considered (500)

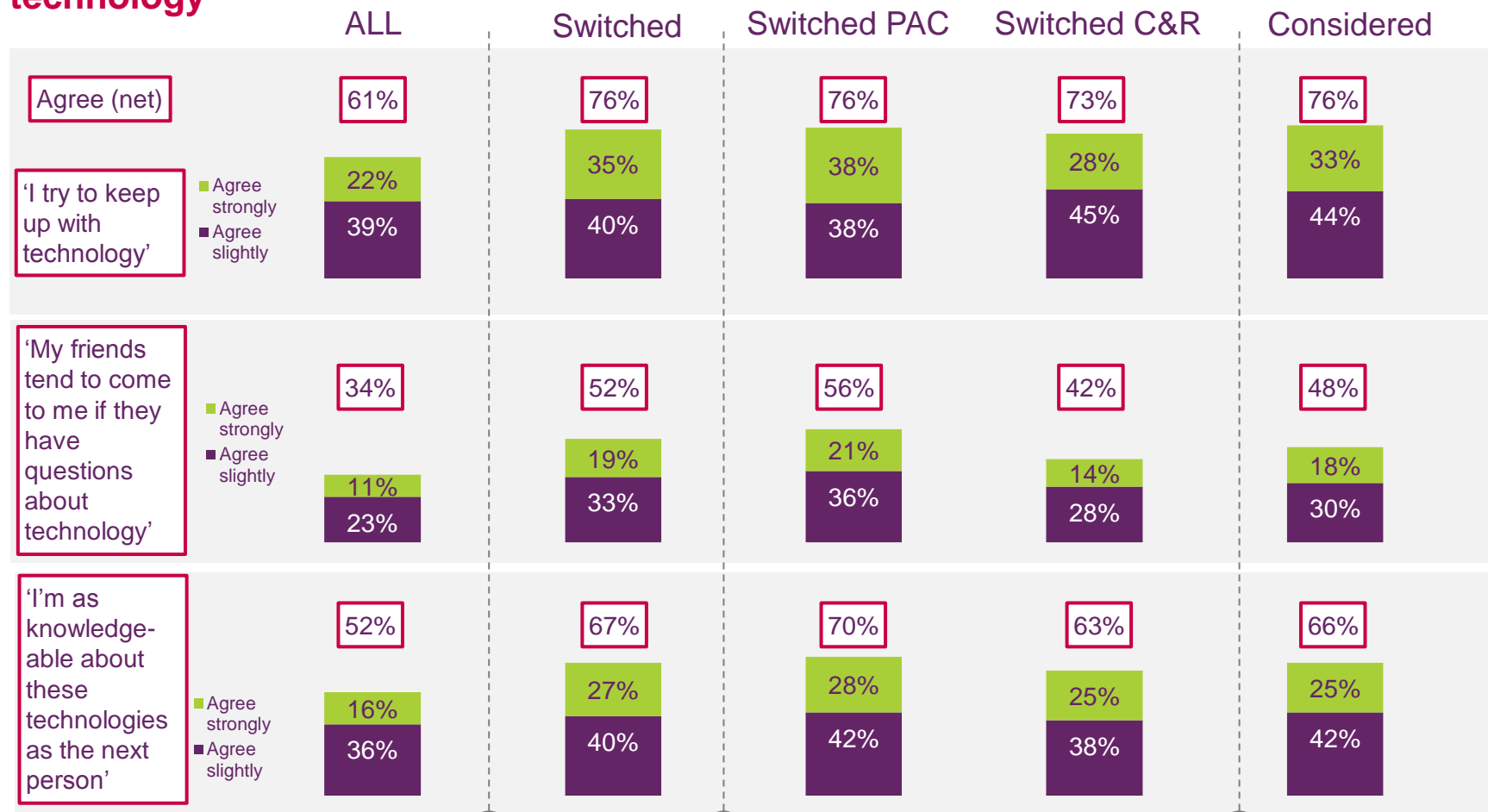
# Geographic profile of switched and considered switching





## Attitudes to technology

**‘Switched’ and ‘considered’ sample groups are more likely to keep up with technology**



QA9 Before we ask you more about the mobile 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...

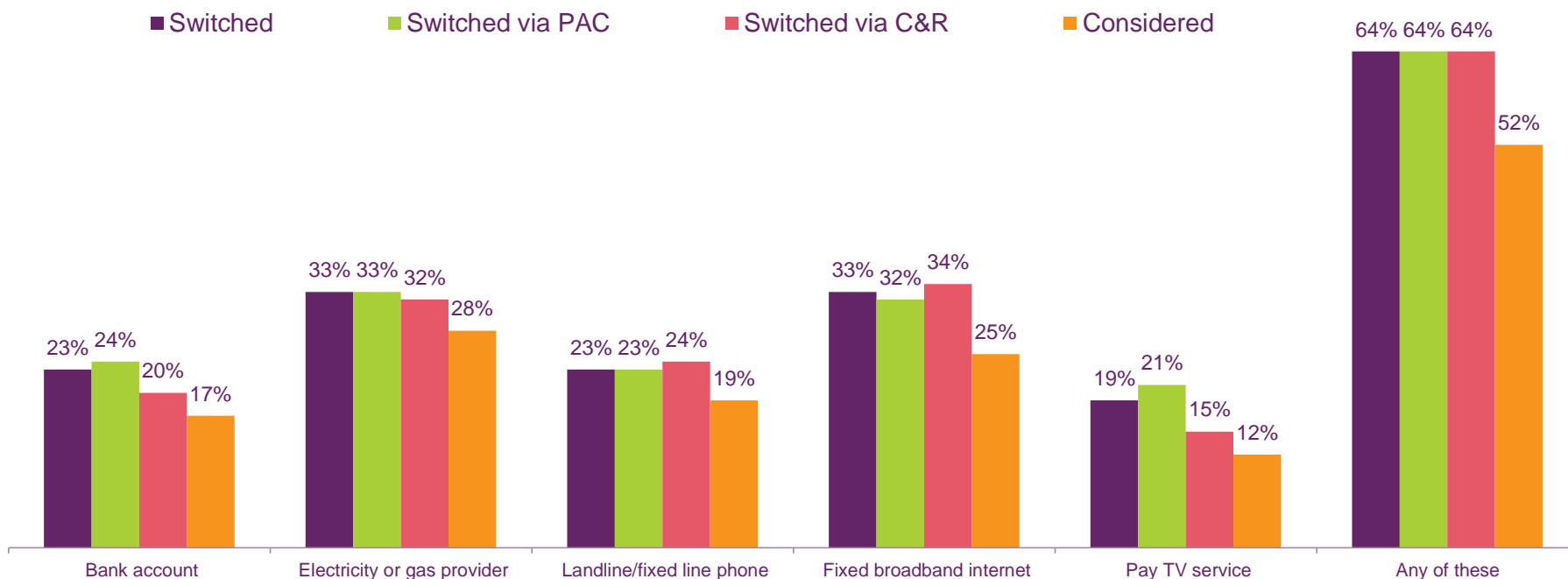
Base: All respondents (6762) / All switched last 18m (1306) / All switched via PAC (705) / All switched via C&R (601), All considered (500)



# PROFILE IN MOBILE USAGE

## Switching in other markets in the past 18 months

Those considered in 12 months but not switched in 18m also less likely to have switched in other markets

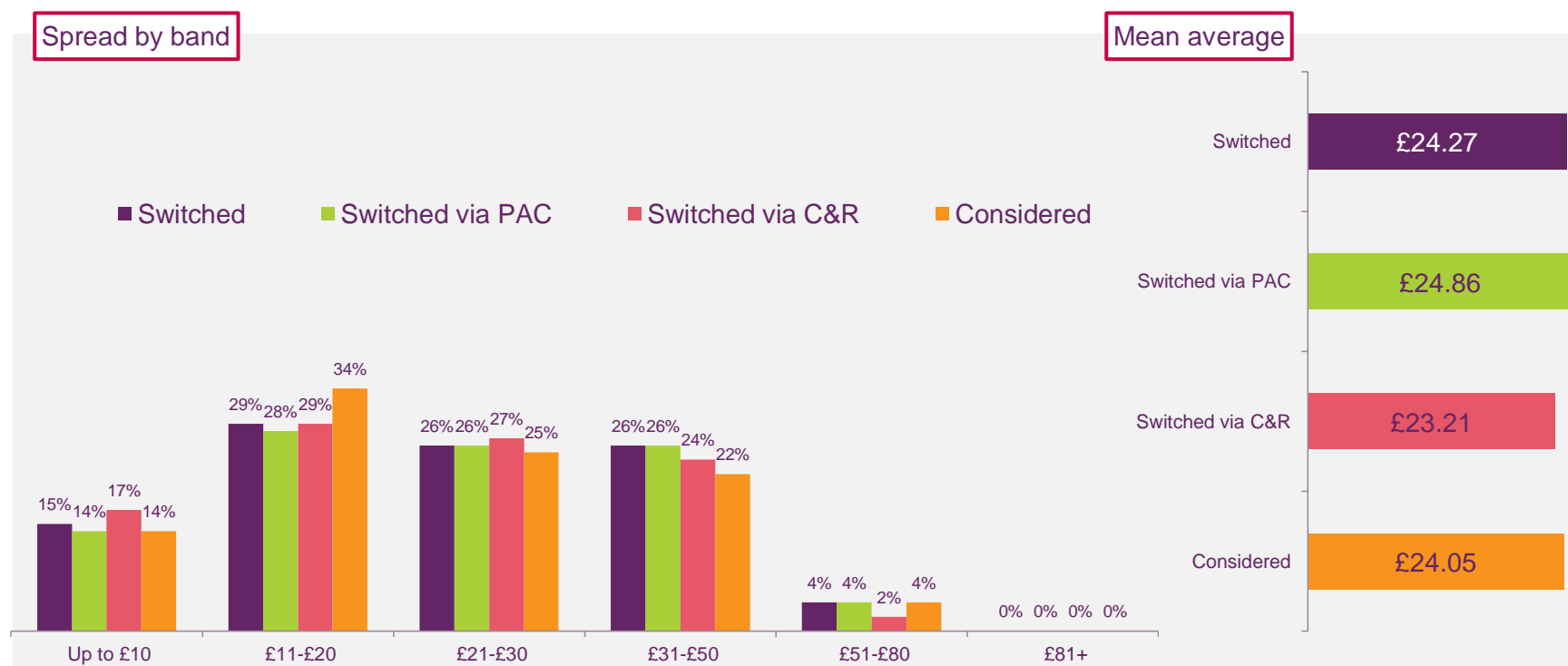


QA10 Looking at the following services, for which, if any, have you changed provider in the last 18 months?

Base: All respondents (6762) / All switched last 18m (1306) / All switched via PAC (705) / All switched via C&R (601), All considered (500)

## Typical contract spend (per month)

Monthly spend is similar between those who have switched compared to those who had considered only

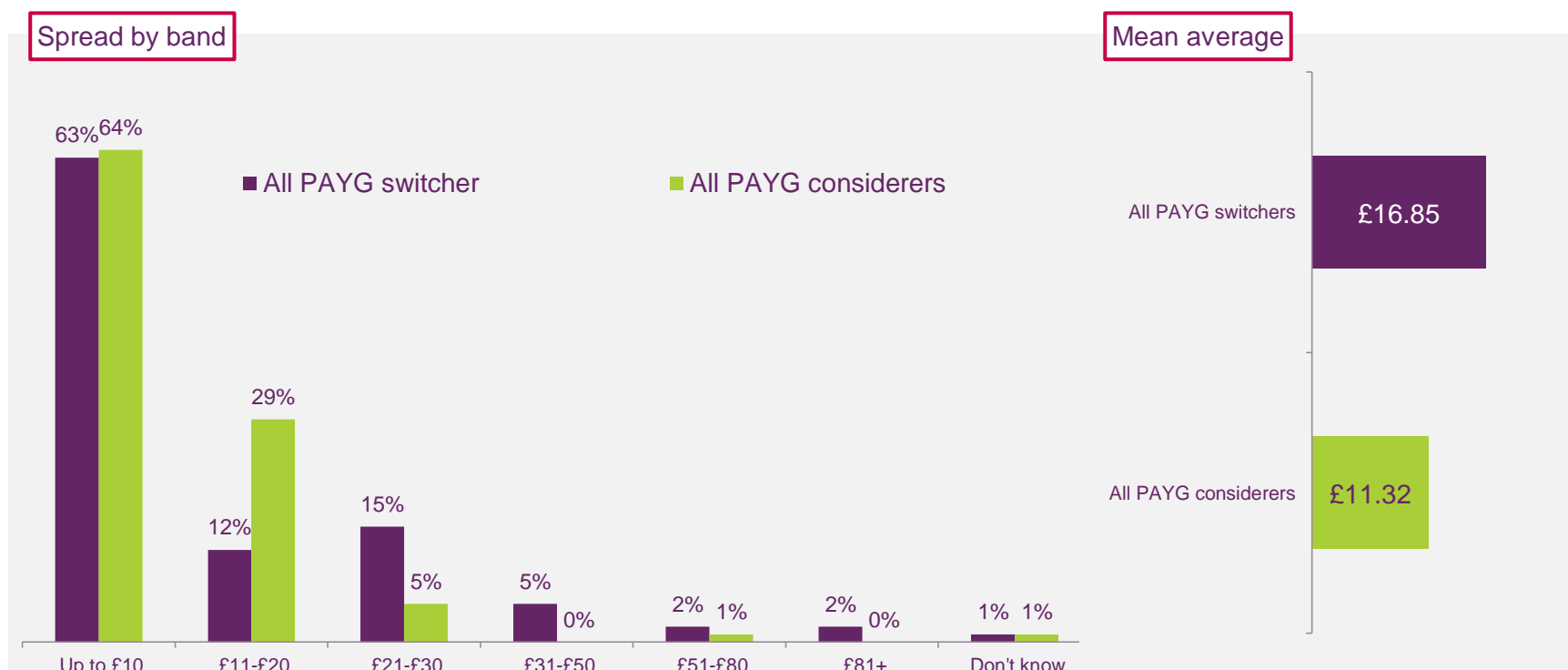


QB4 How much do you pay on average for your mobile phone contract per month?

Base: **Have contract**: All switched in last 18m (1205) / All switched via PAC in last 18m (604) / All switched via C&R in last 18m (601) / All considered switching in the last 12 months (361)

## Typical PAYG spend (monthly)

Average spend is higher for PAYG switchers compared to those who have considered only

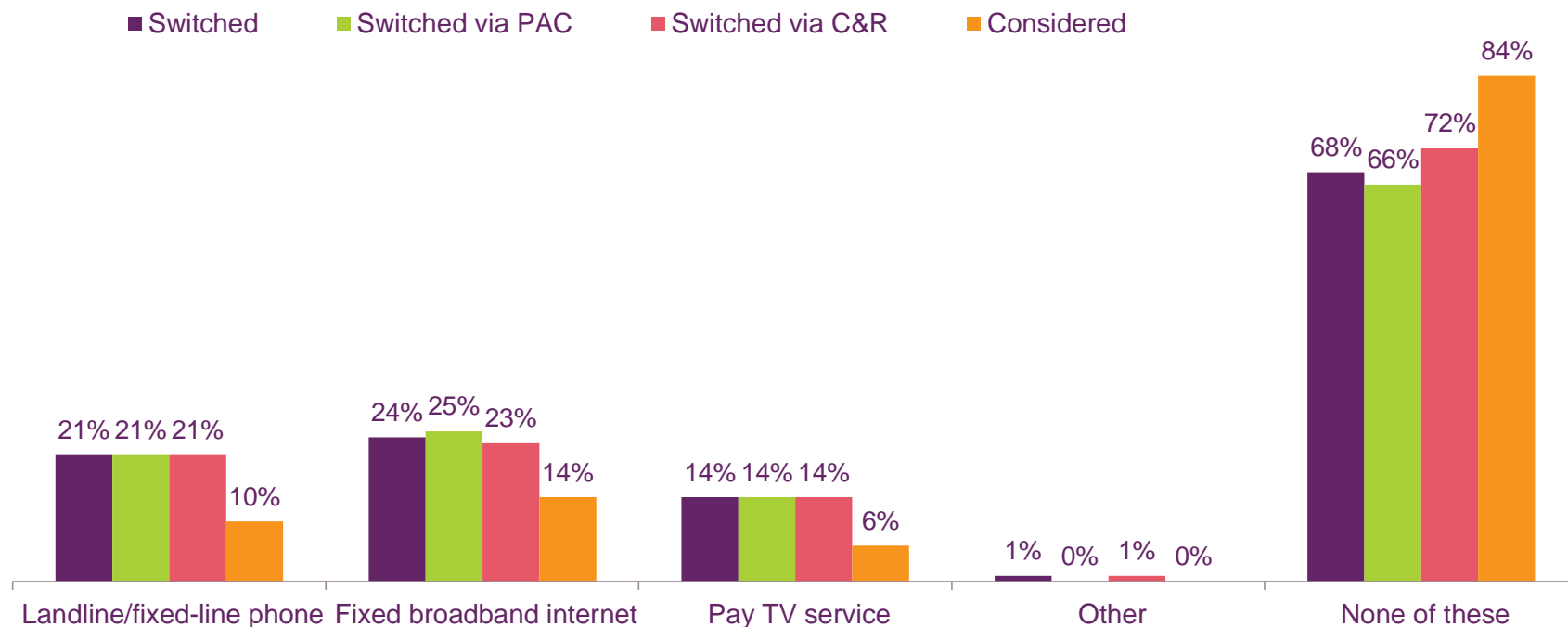


QB4 How much do you pay on average for your top up on average per month?

Base: **Have PAYG**: All switched via PAC in last 18m (101)/ All considered switching in the last 12 months (139)

## Usage of products from same provider as mobile network service

### Incidence of usage similar for those that have switched compared to considered only



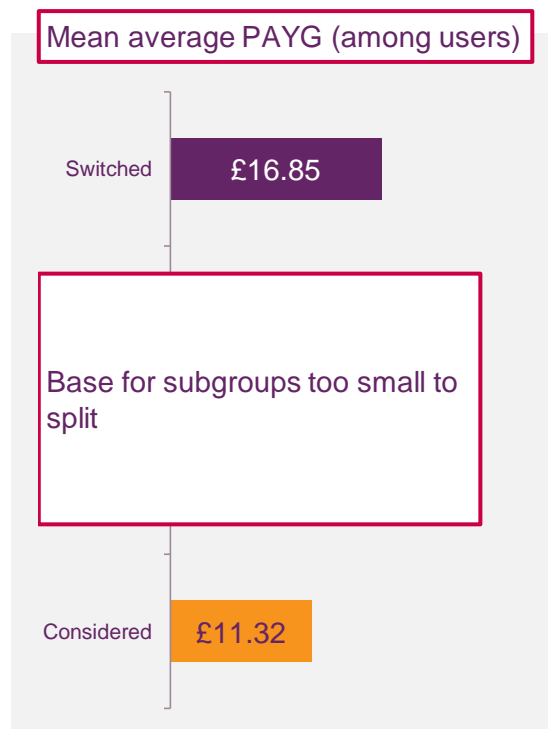
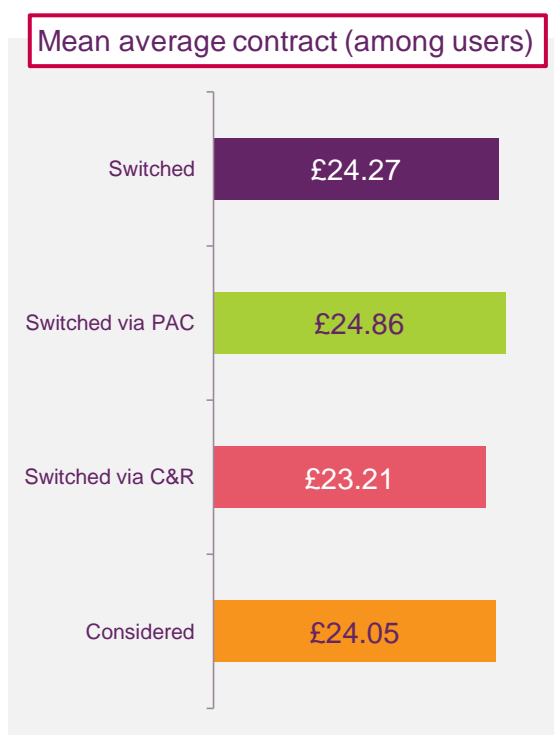
QB3 Which, if any, of the following services do you also purchase from the same provider as your current mobile network service? (e.g. landline/fixed line phone, fixed broadband internet, Pay TV service)

Base: All respondents (6762) / All switched last 18m (1306) / All switched via PAC (705) / All switched via C&R (601), All considered (500)



## Typical spend (per month)

Monthly contract spend is similar between those who have switched compared to those who had considered only, but slightly higher for PAYG switched vs. considered



QB4 How much do you pay on average for your mobile phone contract per month?

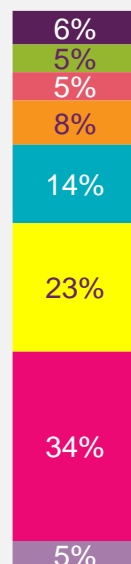
Base: **Have contract**: All switched in last 18m (1205) / All switched via PAC in last 18m (604)/ All switched via C&R in last 18m (601)/ All considered switching in the last 12 months (361)

## Time left on contract

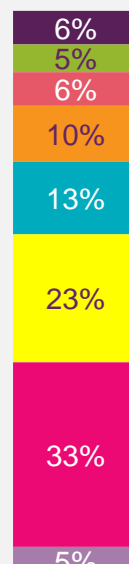
**A third of those who switched had more than 12 months left on their contract**

### Spread by band

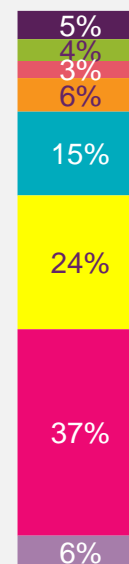
- Am now 'out of contract'/am on a rolling one month
- Don't have a specific time limit on the contract
- In the next month
- In 2-3 months
- In 4-6 months
- In 7-12 months
- In more than 12 months
- Not sure when contract runs out



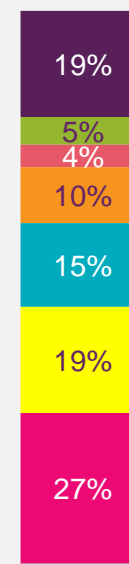
Switched



Switched  
via PAC



Switched  
via C&R



Considered

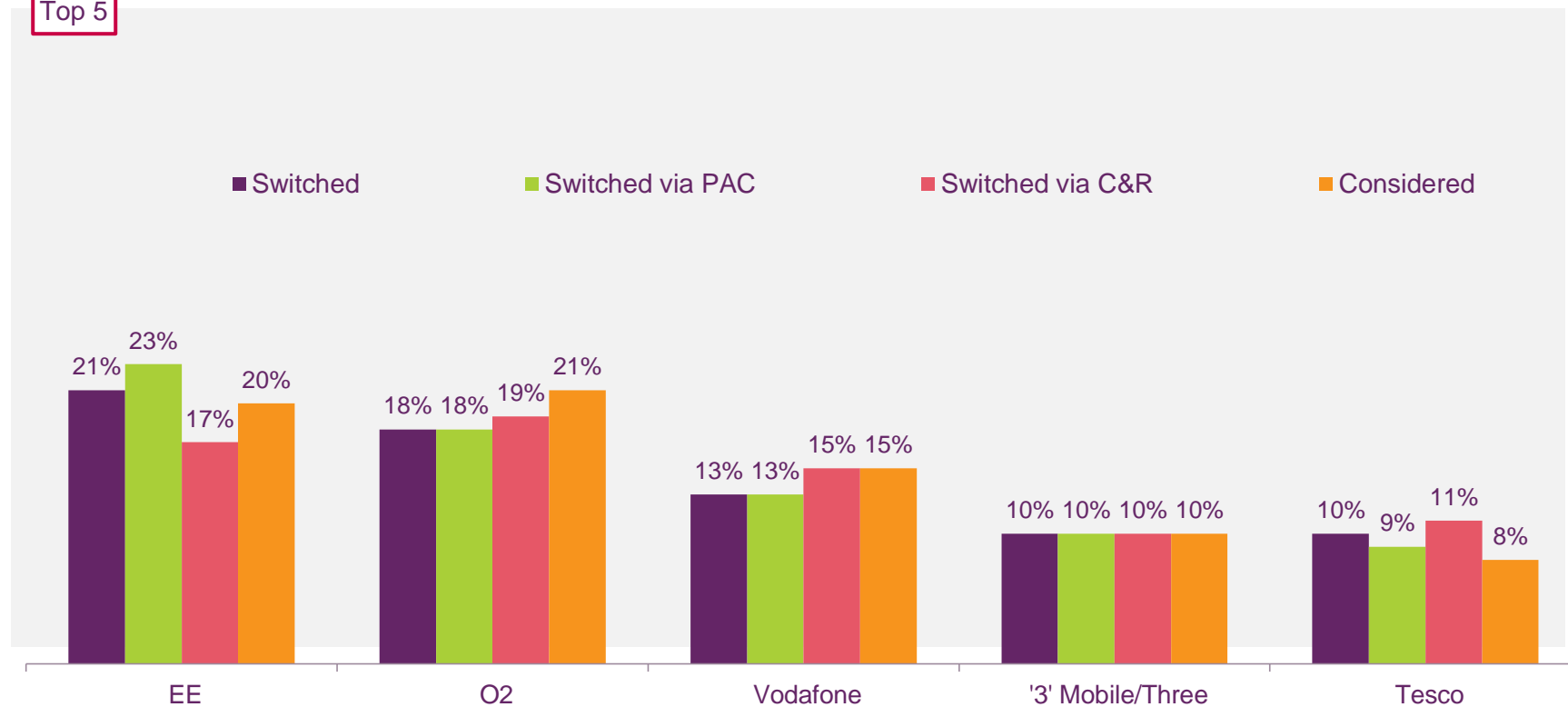
QB5 How much longer do you have left on your mobile phone contract – that is, when does your current contract run out?

Base: **Have contract**: All switched in last 18m (1566) / All switched via PAC in last 18m (604)/ All switched via C&R in last 18m (601)/ All considered switching in the last 12 months (361)

## Network used currently

One in five of our sample of switchers moved to EE and to O2, more than to Vodafone

Top 5



QB2A. Which provider do you currently use for the main mobile phone package you personally use and pay for?

Base: All switched in last 18m (1306), All switched via PAC (705), All switched via C&R (601), Considered (500)