

Mobile Switching: attitudes towards current and potential alternative processes

Produced by: BDRC Continental

Note: This document has been re-published to include analysis of additional open ended responses in relation aspects 'disliked' about previous method of cancellation or PAC request on slides 30, 31, 35 and 36.

Note: This document has been re-published (December 2017) to include the analysis of the willingness to pay data included in the Statement, see Annex 2 of this slide pack.

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Background and objectives

Project Background:

Ofcom published a Consultation on mobile switching processes in March 2016. Further to this research was required to understand:

- The consumer experience and attitudes in relation to contact with their previous provider; and
- Attitudes to Ofcom's proposed reform options.

Ofcom proposed two alternative process reforms; Auto-Switch and Gaining Provider Led (GPL) these are set out in full in Ofcom's May 2017 consultation 'Mobile Switching – proposals to reform switching of mobile communication services' and on slides 41-43 and 71-72 in this summary.

Research Objectives:

- Key objectives:

Attitudes towards current switching processes:
understanding consumers' previous experience, attitudes towards previous provider contact

Attitudes towards Ofcom's two reform options:

- Auto-Switch
- GPL (gaining provider led)

Including stated likely take up and value placed on each option

Methodology (1)

Data collection

- The main survey was conducted among an online panel sample
- Online research allowed a cost effective and efficient means to reach the low incidence audiences required
- Fieldwork took place from 23rd January to 6th February 2017
- A sizing Omnibus survey, conducted face to face, was also undertaken 30th November to 6th December 2016

Sample

- The overall sample size was 2,009 interviews with switchers in the last 18 months for the online survey.
- The sample comprised 1,251 previous 'PAC* switchers' (PAC), i.e. switched and kept their mobile number; and 758 'cease and re-provide' (C&R) switchers, i.e. switched and changed their mobile number.
- No quotas or targets were set, and no weights were applied. The sample was allowed to fall out naturally, but monitored against the expected demographic profile and switching subgroup incidence rates.
- The sample size for the Omnibus survey was 4,323, of which 491 were switchers in the last 18 months. The survey was nationally representative.

*PAC = port authorisation code, the code required in order to transfer a mobile number between mobile operators

Methodology (2)

Approach to stated and down-weighted take-up of alternative switching methods (i.e. process reform options)

- Respondents were presented with alternative hypothetical methods of switching/requesting their port authorisation code (PAC), i.e. the code that enables switchers to keep their mobile number when they switch. They were asked for each whether they were likely to use this rather than the way they switched/ requested the PAC previously.*
- When analysing stated take-up of a future scenario/product it is appropriate to down-weight responses. This is to reflect that people will not always do what they say they will.
- We have applied a down-weight of 80% for those stating they would 'definitely' take up each new option and 20% for those stating they would 'probably' take up the option. Both the stated and down-weighted take-up figures are reported in this report.

Approach to stated and down-weighted willingness to pay (WTP) for alternative switching methods (i.e. process reform options)

- Respondents were also asked about how much they would be willing to pay for each option.
- For the consultation we calculated stated values, based on an average of the highest values respondents said they were 'willing to pay' as well as various adjusted figures among sub-groups of respondents.
- The adjustment is a down-weight applied by take-up and results in a conservative estimate of the values respondents are willing to pay. Further detail on weighting is set out in the technical appendix.
- Using this approach, two *stated* average values for each option have been calculated, the first only takes account of the highest value respondents said they would 'definitely' be willing to pay (referred to as 'definitely'). The other *also* takes account of the highest stated value respondents said they would 'probably' be willing to pay (referred to as 'probably'). Both values are based on the responses of those who said they would either definitely or probably take up the option.
- Four *adjusted* average values for each option have been calculated. Details of these calculations are set out on the next slide.

*The sequence the hypothetical switching methods were presented in was alternated from respondent to respondent, to mitigate the influence of any order effect.

Methodology (3)

Calculations to determine average stated and adjusted WTP values

- Four *adjusted* average values for each option have been calculated as follows:
 - £ respondents were 'definitely' willing to pay – among those who would 'definitely' take-up the process, adjusted for lower than stated take-up (80% definitely).
 - £ respondents were 'definitely' willing to pay – among those who would 'definitely' or 'probably' take-up the process, adjusted for lower than stated take-up (80% definitely/20% probably).
 - £ respondents were 'probably' willing to pay – among those who would 'definitely' take-up the process, adjusted for lower take-up than stated (80% definitely).
 - £ respondents were 'probably' willing to pay – among those who would 'definitely' or 'probably' take-up the process, adjusted for lower take-up than stated (80% definitely/20% probably).
- In each case the average was based on the maximum value each respondent would 'definitely' or 'probably' pay (as appropriate for each of the four values above).
- For the Statement (see Annex 2) we analyse 'willingness to pay' as a measure of the proportion who would take up at each price point, with responses to take up if free treated as 'willingness to pay if £0'. For each price point (including take-up if £0), we establish the proportion of respondents 'definitely' or 'probably' willing to take-up. We then apply a down-weighting to these proportions to derive an 'adjusted take-up/WTP' at each given price. Average adjusted WTP was derived by taking x% of the amount for definitely willing to pay and y% of the additional amount for probably willing to pay. This was 80% and 20% for the base case, 80% and 0% for the low case, and 80% and 40% for the high case.

Approach to analysis of respondents who only stated interest in the online

- Due to the questionnaire structure, the values for Auto-Switch combined SMS/online among PAC switchers were run using data from a reduced sample. This sample *excludes* those respondents who said they 'might' take up the SMS option but would 'definitely or probably' take up the online option. These respondents did not provide a value they were willing to pay for the online option. In the Consultation these 61 respondents were removed from the base. See technical appendix for further detail.
- For the Statement we took a more conservative approach to this analysis. This approach is consistent with how the data has been used to estimate 'take-up'. Under this approach we retain these 61 respondents in the base and analyse them according to their response to 'take-up of SMS' i.e. they said they 'might' take up the SMS option (and so they do not appear in the take-up estimates) and so we apply a £0 value.

Executive summary

Executive summary

Experience of, and attitudes towards previous switching process used

Two-thirds (65%) of mobile switchers kept their number when they switched (i.e. followed the PAC process)

Most (65%) mobile switchers (switched in the 18 months prior to interview) kept their number when they switched (i.e. PAC switcher). The remainder (34%) changed their number (i.e. C&R switcher). C&R switchers tended to be younger than PAC switchers and more likely to be in the DE socio-economic group/not working.

More than half (54%) of C&R switchers stated no preference for keeping their number the last time they switched but a minority (15%) either said they had 'really wanted' (7%) or had a 'mild preference' (7%) to keep their number the last time they switched. This equates to 6% of mobile switchers. When asked about *current* preferences towards their mobile number, half (50%) of previous C&R switchers said they 'definitely' or 'probably' would ideally want to keep their number if they switched again. This compares to three-quarters (77%) of previous PAC switchers.

PAC requests tended to be made at the same time as cancelling; before signing up with the new provider; and largely via the phone

Nearly two-thirds (63%) of PAC switchers said they requested their PAC and cancelled their previous service at the same time. A further 14% said they only requested a PAC and did not cancel their service. The remainder either said the PAC request and cancellation happened on separate occasions (15%) or they did not recall (7%).

Just over a third (37%) of PAC switchers said they requested their PAC after they had signed up with their new provider, while 62% made this request at some point before this (i.e. before deciding to switch or signing up). Three-fifths (61%) of PAC switchers requested their PAC via the phone, with lower proportions mentioning alternative routes. In total, three-quarters (74%) requested their PAC either via phone or in-store.

Most switchers were satisfied with their previous method of requesting a PAC and/or cancelling their previous service

Around four in five (82%) switchers who requested a PAC were satisfied with their previous method and a similar proportion who cancelled their previous service (including both PAC and C&R switchers) said they were satisfied with the way they did this previously (79%). Dissatisfaction stood at 16% for PAC requests and 14% for method of cancellation.

Most (89%) switchers recalled contact with their previous provider when they switched, and a quarter recalled discussing aspects other than their PAC or cancellation. For many (59%) these discussions were around alternative deals, or aspects related to ending their contract e.g. end of contract date (28%), other products and services (26%), services they would lose if they switched (25%), or outstanding charges (20%).

Interest in potential future switching options (1)

Respondents were presented with hypothetical methods of switching/requesting a PAC/code. They were asked for each whether they were likely to use this rather than the way they switched/requested their code previously. As noted in the methodology section, data on stated take-up has been adjusted to reflect that people will not always do what they say they will.

Interest in Auto-Switch options

Among previous PAC switchers nearly two in five (41%) said they would switch via the Auto-Switch SMS option presented to them (adjusted) Unadjusted data reports four in five (78%) previous PAC switchers said they would definitely or probably use Auto-Switch via SMS if this were available, rather than the way they switched last time. Adjusting the data to take account of the likelihood that some of these respondents would *not* follow the new process (and likely still contact their old provider) takes likely take up to 41% among this group of switchers.

Adjusted take up of Auto-Switch either SMS/online stood at around two in five among both PAC and C&R switchers

Previous C&R switchers were only shown one variant of the Auto-Switch scenario, i.e. one that covered both an SMS and online option. Nearly three-quarters (73%) of previous C&R switchers said they would use this process, instead of the way they switched last time (80% among previous PAC switchers). The adjusted figure stands at 38% among C&R switchers, broadly similar to the adjusted figure for this combined option among PAC switchers (42%).

Interest in Gaining provider led (GPL) option

Take up (adjusted) of a GPL approach to switching was lower than the Auto-Switch option at 30% among previous PAC switchers

Unadjusted data reports two-thirds (66%) of previous PAC switchers said they would use the GPL process presented to them rather than the way they switched last time. This falls to 30% when adjusted to better reflect likely use of this process – lower than adjusted likely take-up of Auto-Switch among this group of switchers.

Among previous C&R switchers take up (adjusted) of the GPL option (24%) was lower than among previous PAC switchers (30%) Unadjusted data reports three in five (58%) previous C&R switchers said they would use the GPL process rather than the way they switched last time. This falls to 24% for C&R switchers when adjusted to better reflect likely use of this process, significantly lower than among PAC switchers (30%), and lower than adjusted potential take-up of Auto-Switch among this group of switchers (38%).

Executive summary

Interest in potential future switching options (2)

Preference for Auto-Switch SMS vs. Auto-Switch online among previous PAC switchers

Half (49%) of all previous PAC switchers stated a preference for Auto-Switch online compared to Auto-Switch SMS or the way they requested their PAC the previous time they switched. Comparatively fewer (35%) stated a preference for Auto-Switch SMS compared to the online option or the way they requested their PAC last time. One in ten (12%) reported some interest in either Auto-Switch options and a minority (3%) stated a preference for their previous method.

Preference for Auto-Switch vs. GPL

More than two in five previous PAC (47%) or C&R (44%) switchers stated a preference for Auto-Switch over GPL

A quarter (24%) of previous PAC switchers said they would have used Auto-Switch (either SMS or online) if this route had been available last time they switched, and they would not have used GPL. A further 23% said they would have used either Auto-Switch or GPL but when asked to choose between the two, stated a preference for Auto-Switch. The comparable figures for previous C&R switchers were 24% and 20% respectively.

Comparatively fewer previous PAC/C&R switchers said they would use GPL (5%/8%) but not Auto-Switch (either SMS or online) with higher proportions (34% and 24%) of PAC/C&R switchers that said they would have used either option, but stated a preference for GPL when asked to choose between the two.

Around three in five potential users of each process, said they thought they would have spent less time speaking to their previous provider if they had used one of the alternative options presented to them

Three in five (61%) previous PAC or C&R switchers who said they would use one of the options presented to them, thought they would have spent less time speaking to their provider than they did previously using these options. This proportion did not vary significantly by the previous type of switch (PAC/C&R) or the option presented (Auto-Switch/GPL).

Executive summary

Willingness to pay for alternative switching options

Respondents were asked how much they would be willing to pay for each of the switching options. Stated values, based on an average of the highest values respondents said they were 'willing to pay' have been calculated. Adjusted figures among sub-groups of respondents, i.e. those who said they would 'definitely' take up the new process or including those who said they would 'probably' take-up the new process have also been calculated. The adjustment is a down-weight applied by take-up. This ensures the willingness to pay data also reflects the likelihood that actual take-up may be lower than stated. Further detail is set out in the methodology slides.

Previous PAC switchers tended to value the switching options presented to them, higher than previous C&R switchers. Average 'definitely' willing to pay values (stated) ranged between 51p-67p depending on the option presented

Previous C&R switchers who said they would either 'definitely' or 'probably' take up the new option/s valued GPL and Auto-Switch SMS/online broadly similarly. The stated average value that these respondents said they would definitely pay was 51p and 52p respectively.

Previous PAC switchers who said they would 'definitely' or 'probably' take up the new option/s tended to report higher willingness to pay values than previous C&R switchers. GPL reported the highest stated 'definite' value (at 67p for PAC vs. 51p for C&R), with Auto-Switch SMS/online at 62p for PAC (59p using the more conservative approach to analysis taken in the Statement) vs. 52p for C&R).

Respondents stated they would 'probably' be willing to pay values of between £1.28 and £1.63 depending on the option presented

The stated values respondents said they were 'probably' willing to pay were higher and stood between £1.28 and £1.63 depending on the option – highest for GPL among PAC switchers who would use GPL and lowest for GPL among C&R switchers who said they would use this process.

The approach to the down-weighting of WTP analysis was revised for the Statement

See the technical appendix and slides 98-100 in this pack for details of this analysis

Summary tables: take-up of process reform options and willingness to pay (WTP)

PAC and C&R switchers

Summary of take-up for each scenario by previous process used

Stated take up

	Auto-Switch SMS	Auto-Switch SMS/online		GPL	
	n=1251	n=1251	n=758	n=1251	n=758
	PAC switchers	PAC switchers	C&R switchers	PAC switchers	C&R switchers
Definitely would	43%	43%	39%	28%	21%
Probably would	35%	36%	35%	38%	37%
Possibly/Possibly not	15%	17%	18%	22%	30%
Probably wouldn't	4%	2%	6%	8%	9%
Definitely wouldn't	2%	2%	3%	4%	3%
Net: 'would'	78%	80%	73%	66%	58%

Base: As shown on table

Summary of take-up for each scenario by previous process used

Adjusted take up (down-weighted by 80/20*)

	Auto-Switch SMS	Auto-Switch SMS/online		GPL	
	n=1251	n=1251	n=758	n=1251	n=758
Down weight applied to each (%)	PAC switchers	PAC switchers	C&R switchers	PAC switchers	C&R switchers
Definitely would (80%)	34%	35%	31%	23%	17%
Probably would (20%)	7%	7%	7%	8%	7%
Net: 'would'	41%	42%	38%	30%	24%

Base: As shown on table

*Stated take-up down-weighted to 80% for those stating 'definitely take-up' and 20% for those stating 'probably take-up'

Average willingness to pay (WTP) for each scenario by process used

Stated willingness to pay (WTP)

	Average definitely WTP* (definitely WTP if definitely/probably take up: as stated)	Average probably WTP** (definitely/ probably WTP if definitely/ probably take-up: as stated)
All C&R switchers (n=758)		
GPL	£0.51	£1.28
Auto-Switch SMS/online	£0.52	£1.41
C&R switchers who would take-up the option		
GPL (n=430)	£0.90	£2.26
Auto-Switch SMS/online (n=539)	£0.73	£1.98
All PAC switchers (n=1251)		
GPL	£0.67	£1.63
Auto-Switch SMS	£0.59	£1.51
Auto-Switch SMS/online***	£0.62	£1.59
PAC switchers who would take up the option		
GPL (n=807)	£1.04	£2.53
Auto-Switch SMS/online (n=959)	£0.77	£1.98

Base: As shown on table

*Average of the maximum values respondents were definitely willing to pay

**Average of the maximum values respondents were probably or definitely willing to pay

***All PAC asked WTP question, i.e. excludes those who stated top two boxes for online but were asked WTP for SMS: 1190. The approach taken in the Statement attributes £0 to these respondents, which is consistent with estimates of 'take up' i.e. where they said they 'might' take up the SMS option they do not appear in the take-up estimates, and so a £0 value would apply. This analysis is run on the total base of 1251 PAC switchers and reports average definitely WTP at £0.59 and average probably WTP at £1.52.

Average willingness to pay (WTP) for each scenario by process used

Adjusted willingness to pay (down-weighted by take-up)

	Average definitely WTP* (definitely WTP only if definitely take-up: down-weighted by take-up: 80/0)	Average definitely WTP* (definitely WTP if definitely/probably take up: down-weighted by take-up: 80/20)	Average probably WTP** (definitely/probably WTP only if definitely take-up: down-weighted by take-up: 80/0)	Average probably WTP** (definitely/probably WTP if definitely/probably take-up: down-weighted by take-up: 80/20)
All C&R switchers (n=758)				
GPL	£0.27	£0.31	£0.54	£0.66
Auto-Switch SMS/online	£0.34	£0.36	£0.71	£0.82
All PAC switchers (n=1251)				
GPL	£0.44	£0.47	£0.72	£0.87
Auto-Switch SMS	£0.37	£0.39	£0.66	£0.80
Auto-Switch SMS/online***	£0.39	£0.42	£0.70	£0.85

Base: As shown on table

*Average of the maximum values respondents were definitely willing to pay

**Average of the maximum values respondents were probably or definitely willing to pay

***All PAC asked WTP question, i.e. excludes those who stated top two boxes for online but were asked WTP for SMS : 1190. The approach taken in the Statement attributes £0 to these respondents, which is consistent with estimates of 'take up' i.e. where they said they 'might' take up the SMS option they do not appear in the take-up estimates, and so a £0 value would apply. This analysis is run on the total base of 1251 PAC switchers and reports the following figures which correspond with the headings in the table above: £0.37, £0.40, £0.67, £0.80.

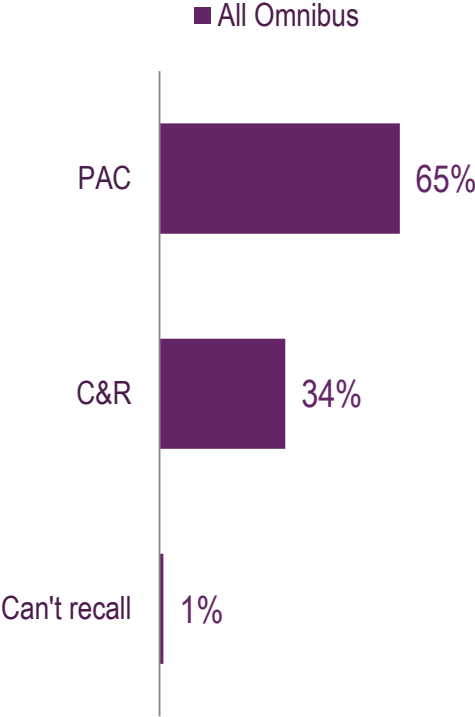
Main Findings

Attitudes towards current port authorisation code (PAC) requests and cancellation

The majority of UK adults who switched mobile phone provider in the last 18 months did so via PAC

Proportion of switchers switching via PAC and C&R

Mobile Switchers*



Switcher Profile

	Switched (PAC)	Switched (C&R)
Male	51%	51%
Female	49%	49%
16-24	16%	28%
25-34	25%	25%
35-44	18%	14%
45-54	20%	12%
55-64	11%	13%
65+	10%	9%
AB	29%	15%
C1	36%	24%
C2	17%	24%
DE	18%	37%
Working	64%	48%
Not working	36%	52%

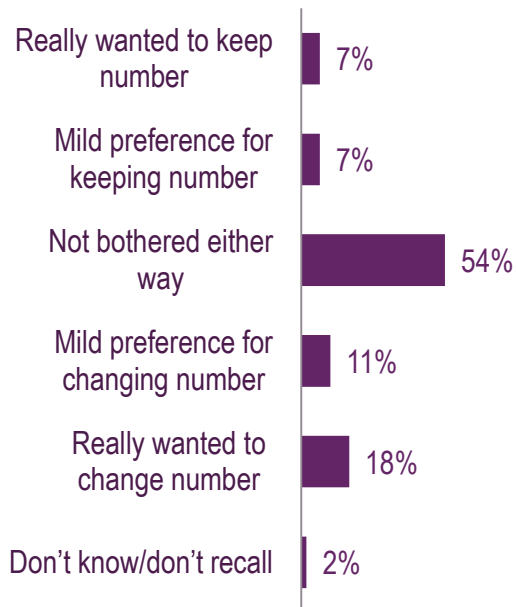
Q. And when you switched did you..?

Base: All who have switched provider in the last 18 months – Omnibus= 491, PAC switchers= 315, C&R switchers = 172
* Figures among all who have switched provider in the last 12 months – Omnibus (63% PAC, 37% C&R – excl. 1% can't recall)

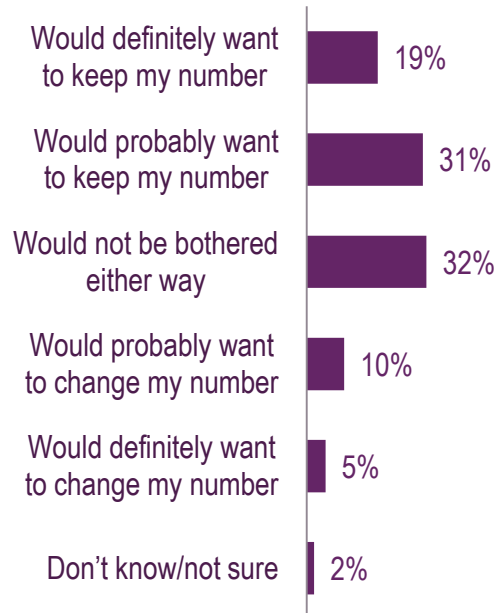
The majority of C&R switchers wanted to retain their number in the future and to a greater extent than when they last switched. PAC switchers were more emphatic about wanting to keep their number in future than C&R switchers

Preference for keeping phone number

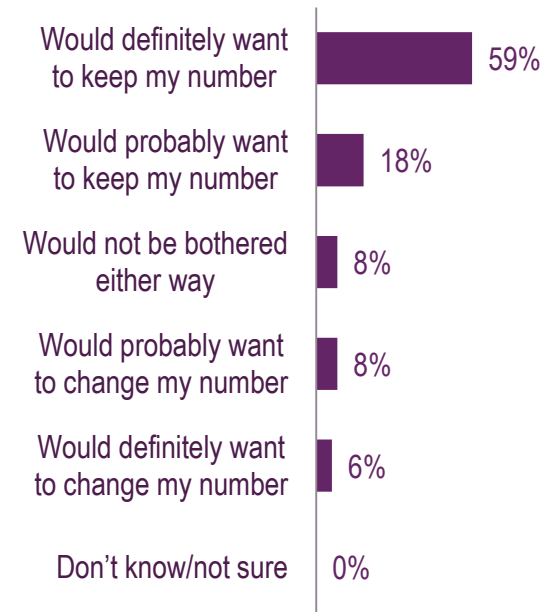
C&R Switchers: when switched



C&R Switchers: preference in the future



PAC Switchers: preference in the future



Q. Which of the following best describes your original preference for keeping your previous number when you switched?

Q. And ideally, what do you think you would want to do if you switched again?

Example reasons given for preference (wanted to keep number but changed)

I have a dual SIM phone and wanted a second number.

I was bought the phone as a gift.

Because my provider made it so extraordinarily difficult to keep the number I had with them.

It would have cost £4.99 to keep number and the process was taking too long.

Switched before previous contract had fully expired.

The process of keeping it was too long and extra so it was easier to stick with the one I was given.

I was having problems with my previous phone and the provider was unable to provide any way of transferring the data from my old phone to the new phone so I had to get a new number and keep the old phone on PAYG.

My old network was ceasing operation, there was a mistake made in passing on information between the old and new provider which meant my number was lost.

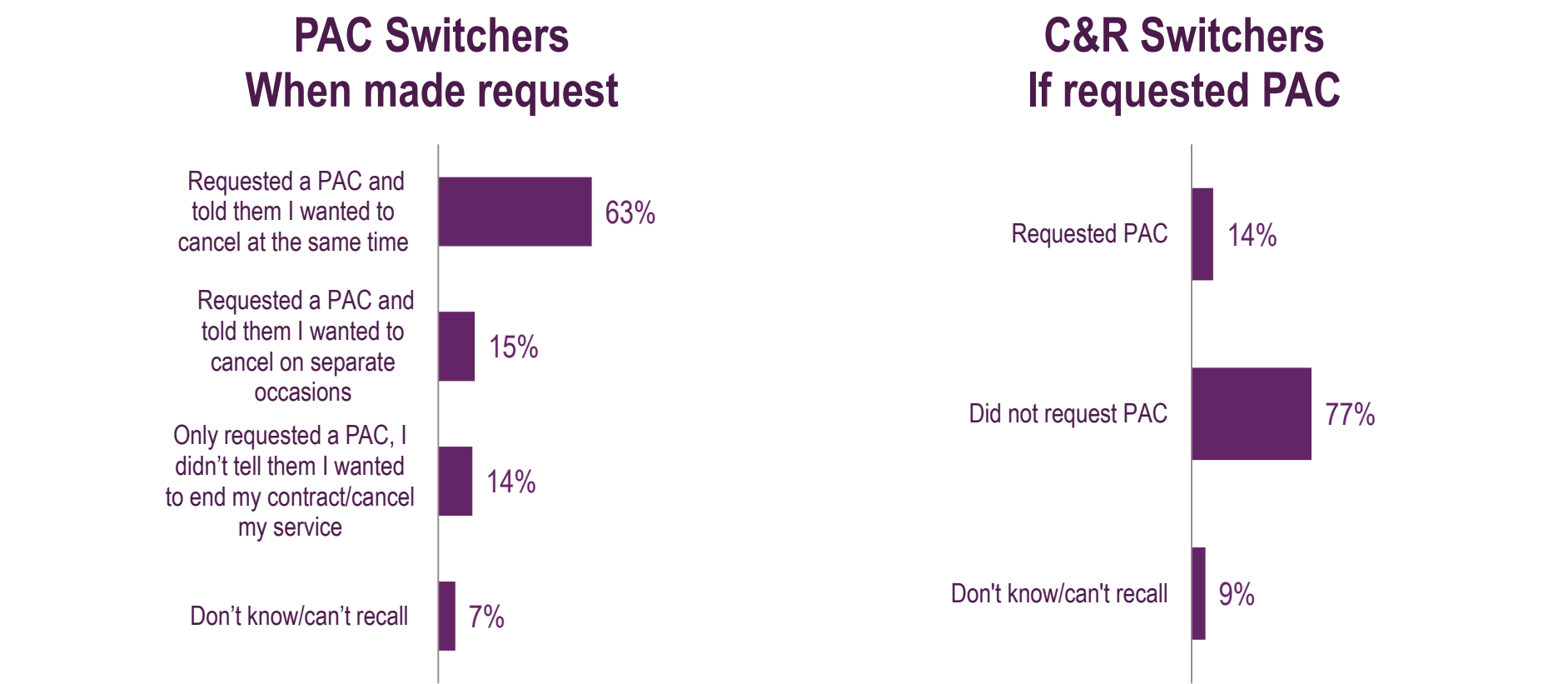
I needed to get a new rolling 30 day deal and couldn't wait to go through the process to keep my old number.

Q. Why did you change your number?

Base: All C&R switchers in the last 18 months who had some preference to keep number when last switched

The majority of PAC switchers informed their previous provider that they were cancelling at the same time as requesting a PAC. A minority of C&R switchers requested a PAC

PAC request timings

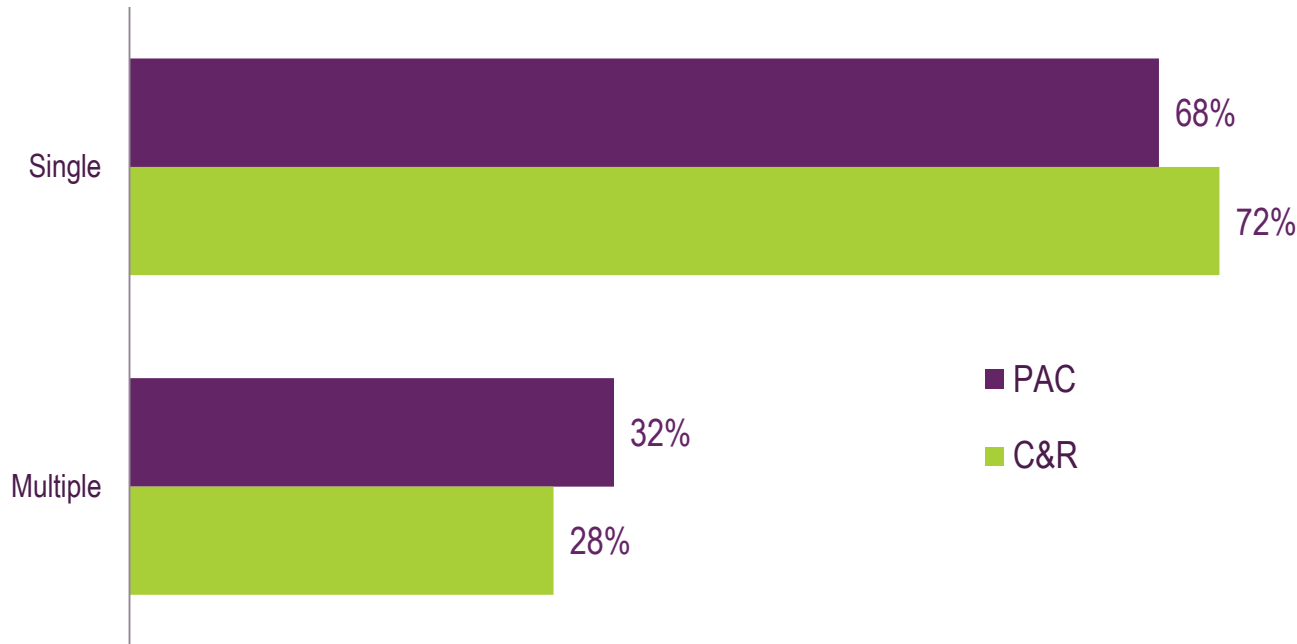


Q. Thinking back to when you switched your mobile provider and kept your phone number, you would have needed to get a code (a Port Authorisation Code or 'PAC') from your **previous** provider to give to your **new** provider, and may have told your **previous** provider that you wanted to end your contract/cancel your service. Did you do both of these, and if so did you do them at the same time, or at different times?
Q. Thinking back to when you switched your mobile provider, did you at any point request a code (a PAC) from your previous provider to give to your **new** provider that would have allowed you to keep your old number?

For around one third of both C&R and PAC switchers, contact was made with their previous provider more than once

Number of contacts to request PAC/ cancel service

Mobile Switchers

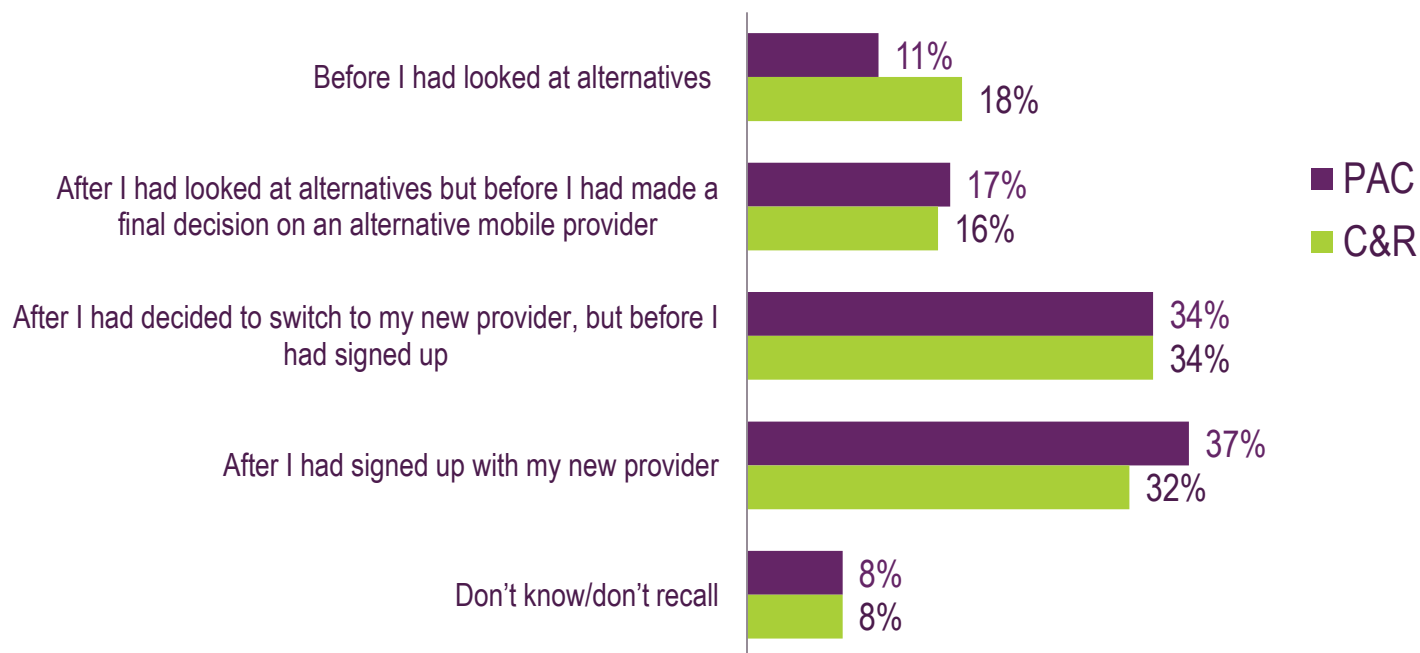


Q. Did you have contact with your previous provider more than once to request your PAC and cancel your service/ to request your PAC/ to cancel your service?

Most switchers (C&R and PAC) had made a PAC request after they had already taken steps to sign up with their new provider

PAC request timings from previous provider

When made PAC request

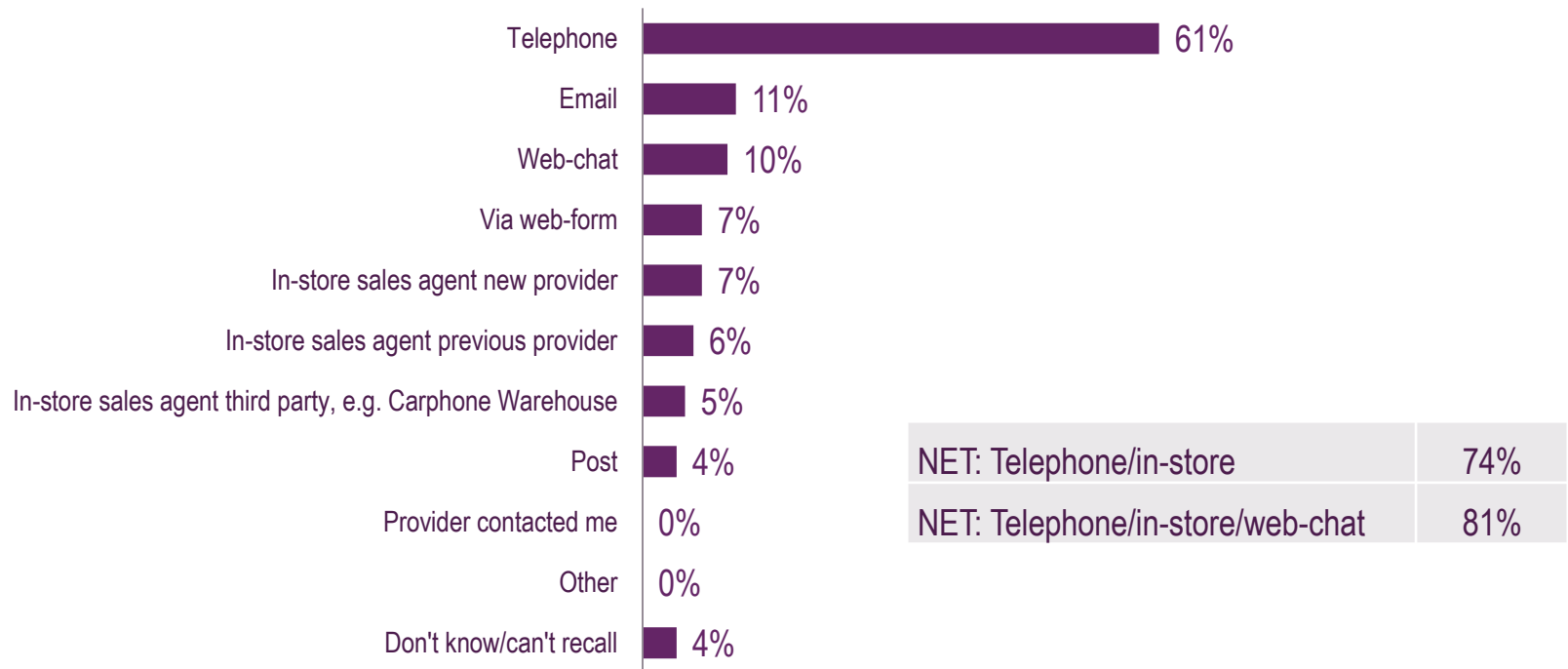


Q. At what point did you request a PAC from your previous mobile provider?

Base: All switchers in the last 18 months: C&R (that requested a PAC) = 104, PAC= 1251

The majority had requested their PAC by telephone

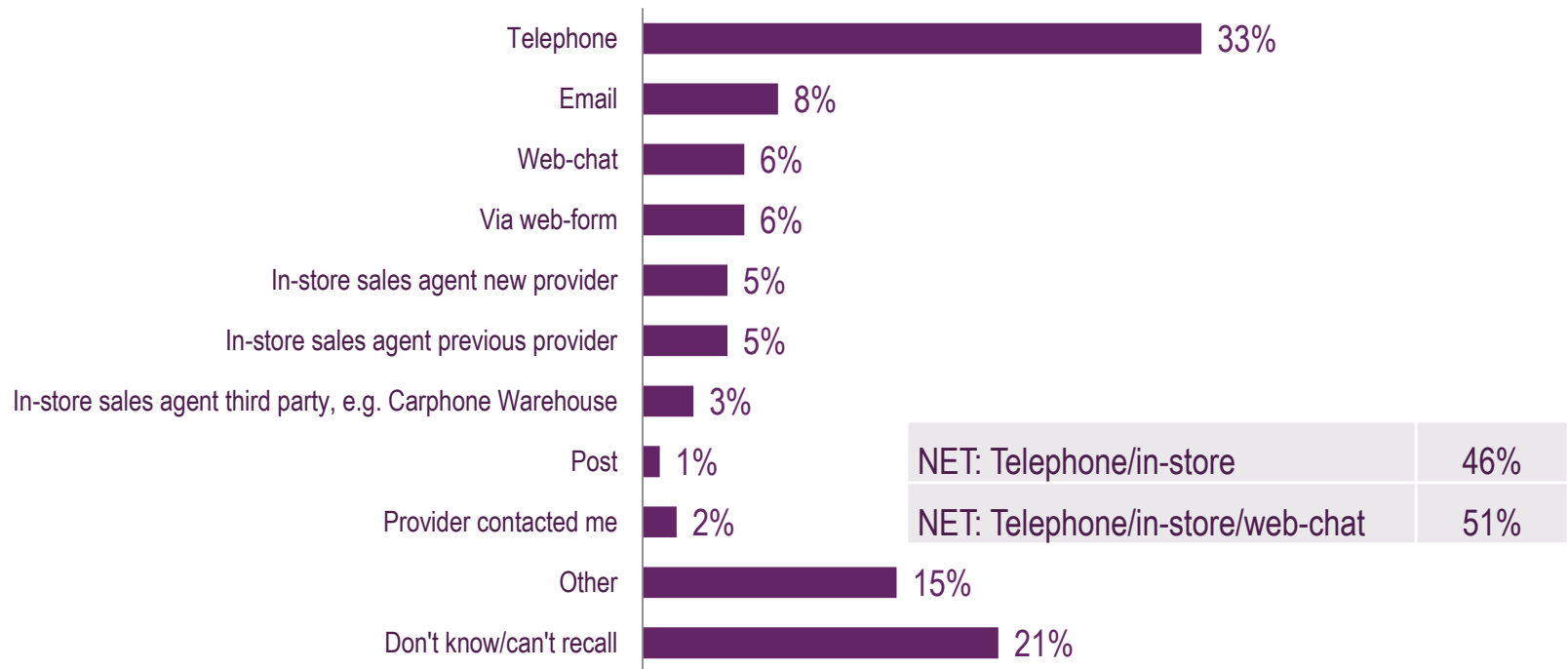
Method used to request PAC/request PAC and cancel service



Q. How did you contact your previous provider to request a PAC/request your PAC and cancel your service? (prompted)

One in three C&R switchers had cancelled via telephone

Method used to cancel previous service

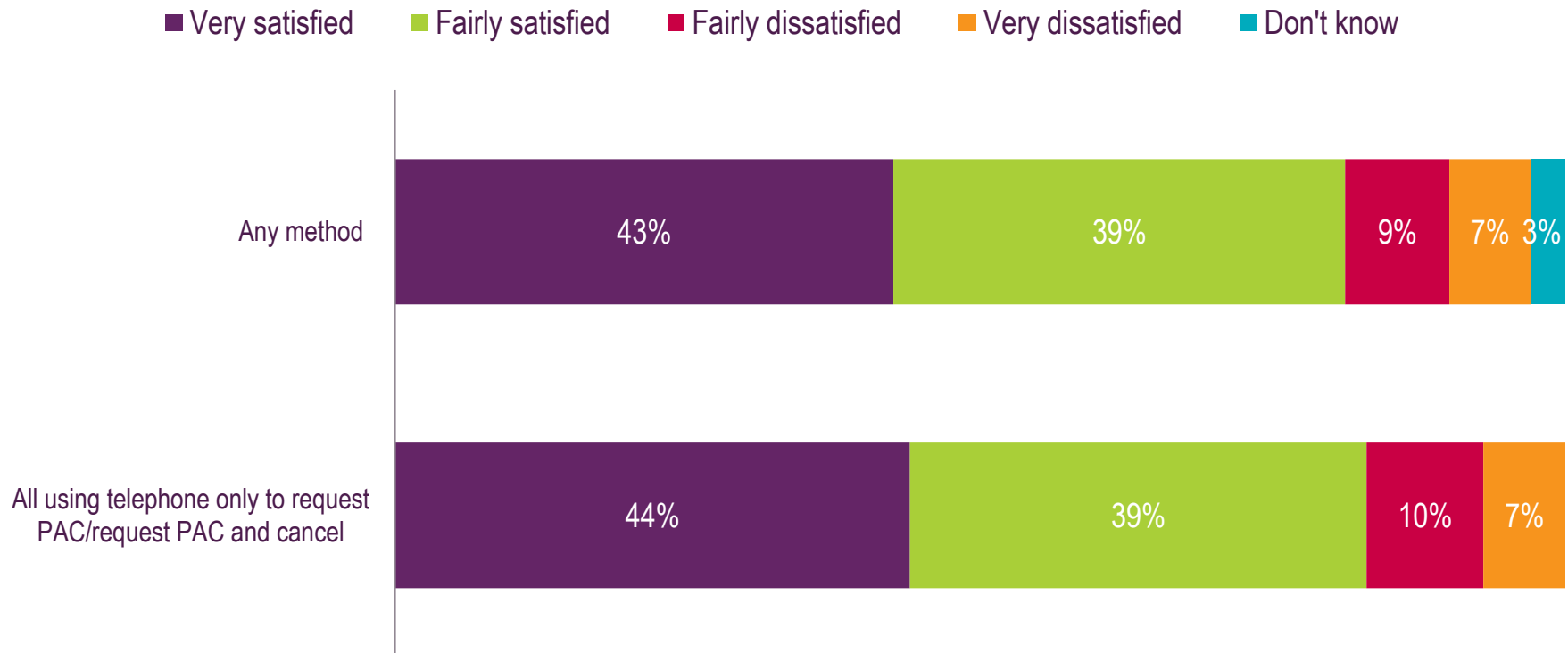


Q. How did you contact your previous provider to cancel your service? (prompted)

Base: All C&R switched in the last 18 months = 758

The majority were either very or fairly satisfied with the previous method used to request their PAC, with over two in five very satisfied with the method

Satisfaction with each method of requesting a PAC



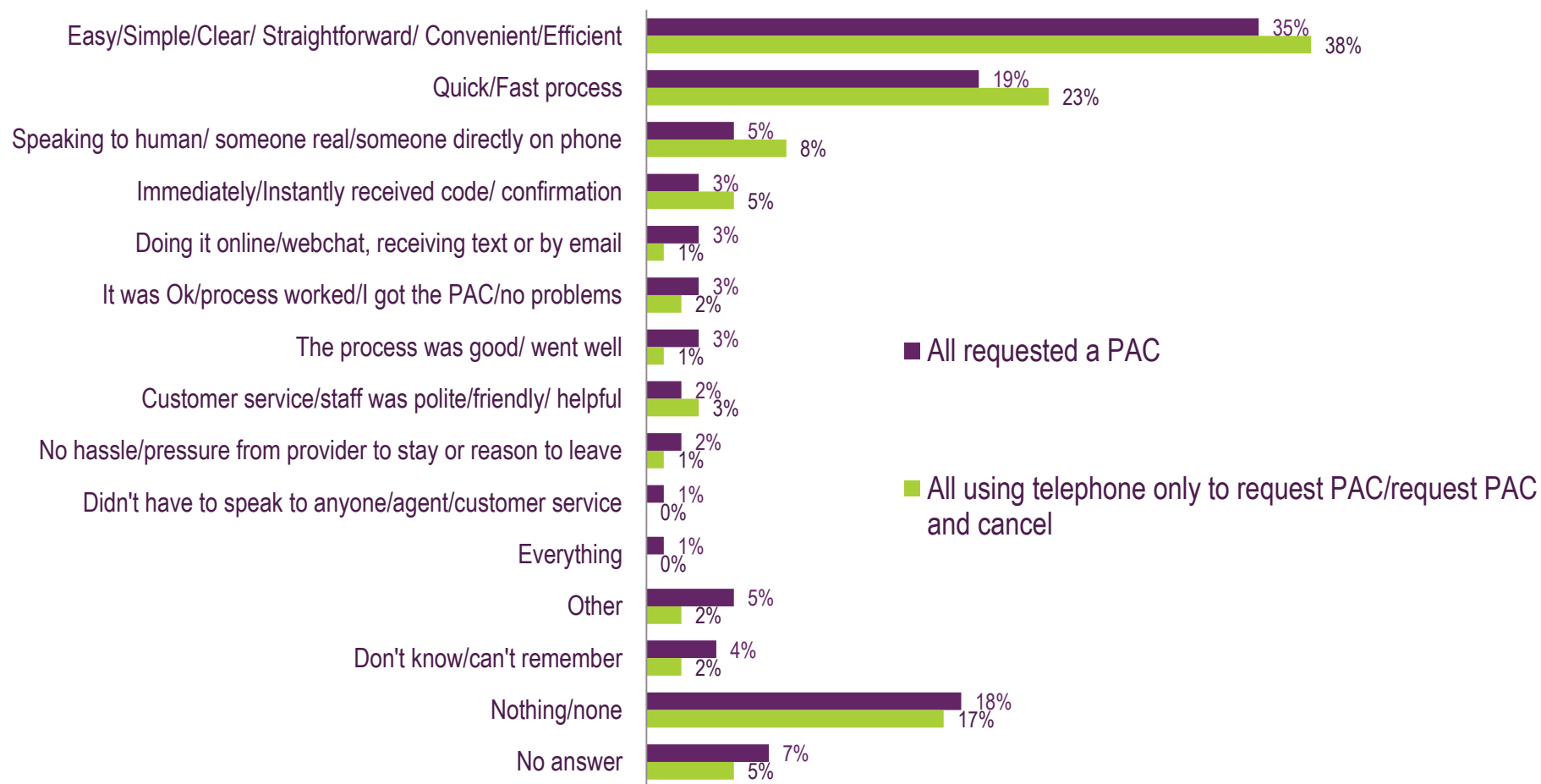
Q. How satisfied were you with [this method/these methods] of requesting a PAC?

Base: All requested a PAC: Any method = 1355, all using telephone only to request a PAC/request a PAC and cancel = 721

Base sizes below 100 for other contact methods

The method previously used for requesting a PAC was liked largely for being an easy straightforward experience

Aspects liked about the previous method of requesting a PAC



Q. What, if anything, was there about [this method/these methods] of requesting a PAC that you liked? (unprompted)

N.B. some respondents mentioned aspects they disliked for this question. These have not been shown in the chart, therefore the sum of responses may equal less than 100%.

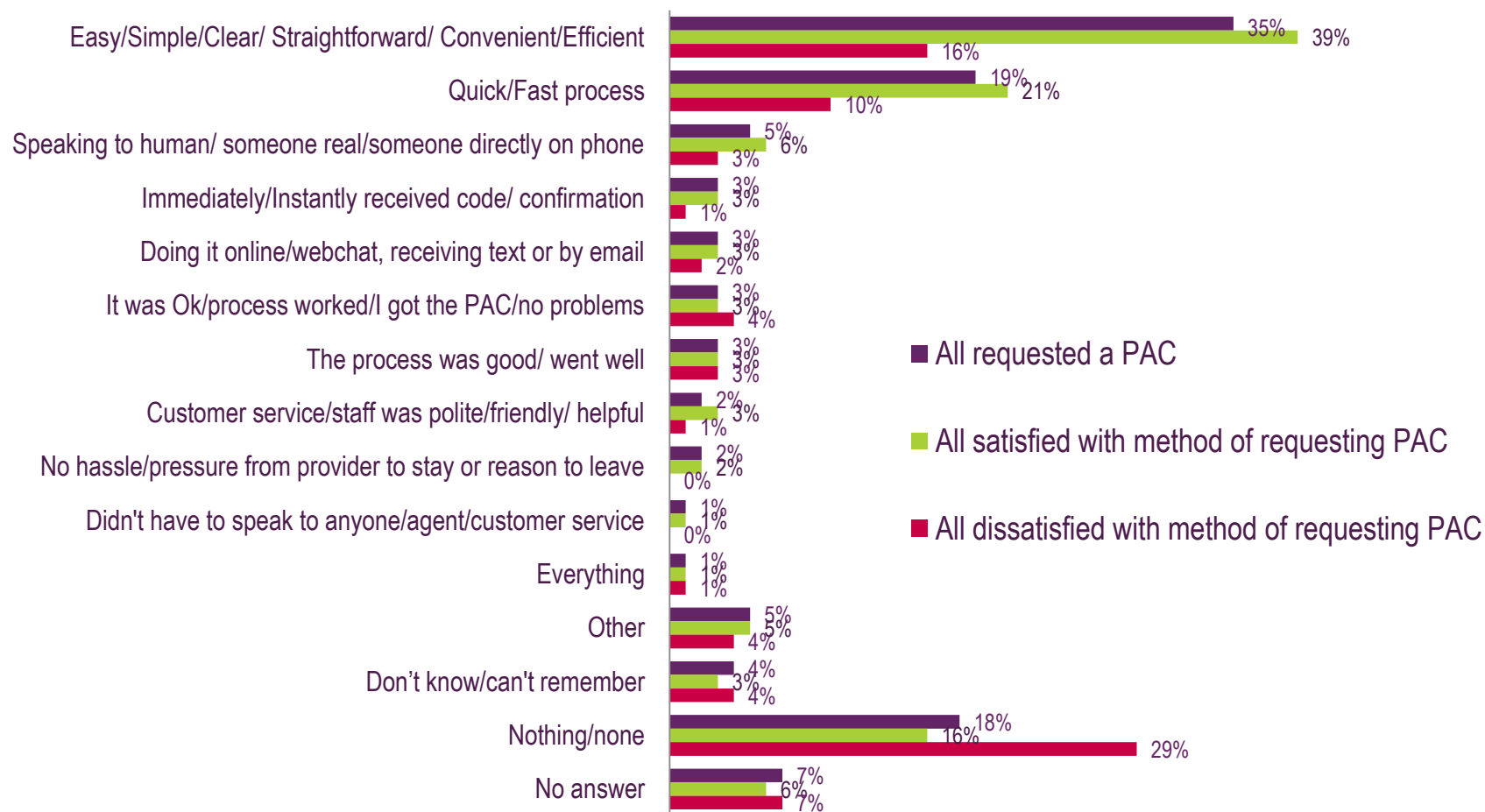
Base: All requested a PAC: Any method = 1355, all using telephone only to request a PAC/request a PAC and cancel = 721

Base sizes below 100 for other contact methods

The method previously used for requesting a PAC was liked largely for being an easy straightforward experience

Aspects liked about the previous method of requesting a PAC

By satisfaction with method of requesting PAC



Q. What, if anything, was there about [this method/these methods] of requesting a PAC that you liked? (unprompted)

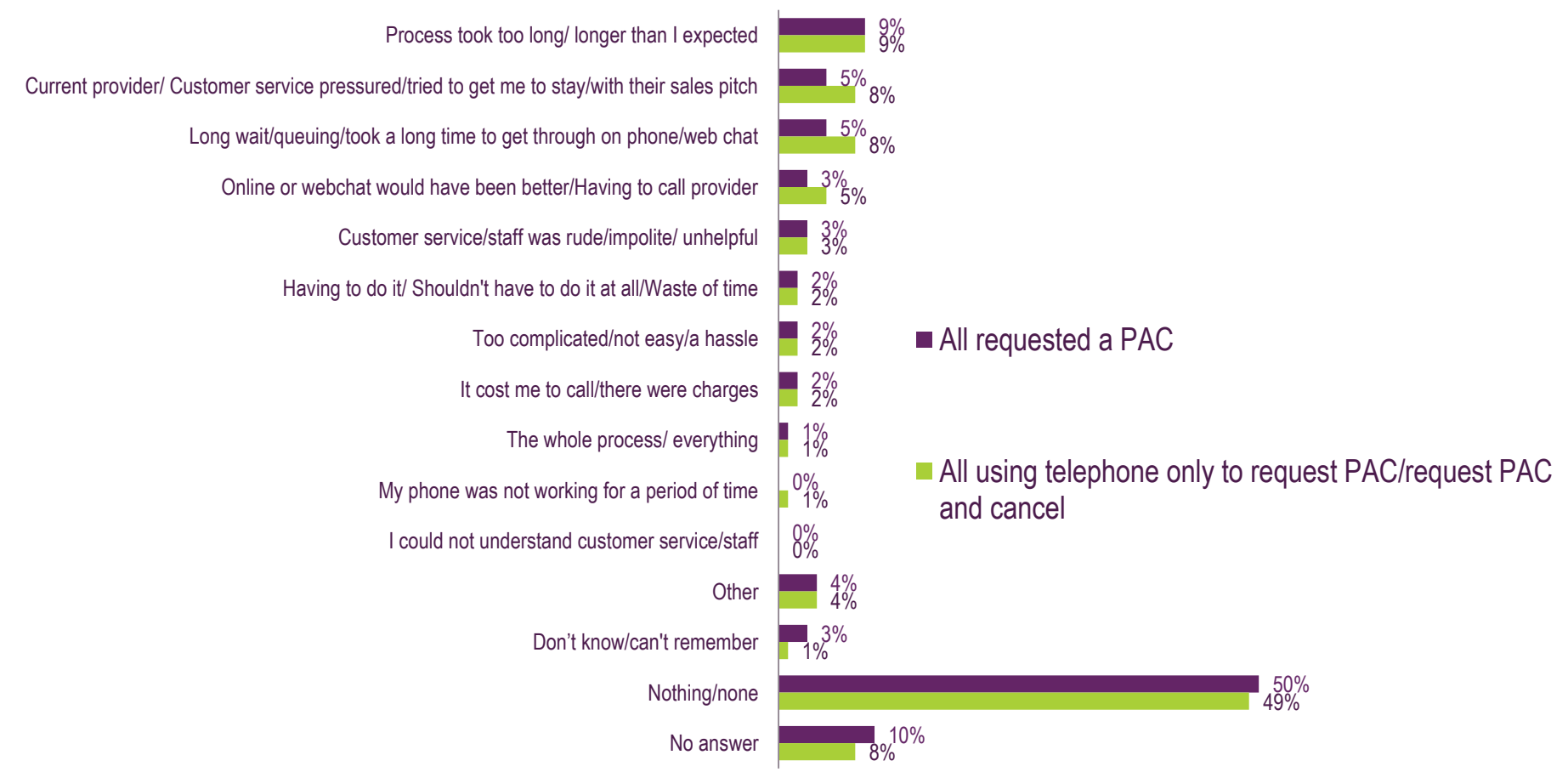
N.B. some respondents mentioned aspects they disliked for this question. These have not been shown in the chart, therefore the sum of responses may equal less than 100%.

Base: All requested a PAC: Any method = 1355, all satisfied with method of requesting PAC = 1107, all dissatisfied with method of requesting PAC = 209

Base sizes below 100 for other contact methods

For respondents that mentioned reasons for disliking the method of requesting a PAC, these were related largely to it being a long process, feeling in a pressured sales environment, or a long waiting time in telephone queues

Aspects disliked about the method of requesting a PAC



Q. What, if anything, was there about [this method/these methods] of requesting a PAC that you did not like? (unprompted)

N.B. some respondents mentioned aspects they liked for this question. These have not been shown in the chart, therefore the sum of responses may equal less than 100%.

Base: All requested a PAC: Any method = 1355, all using telephone only to request a PAC/request a PAC and cancel = 721

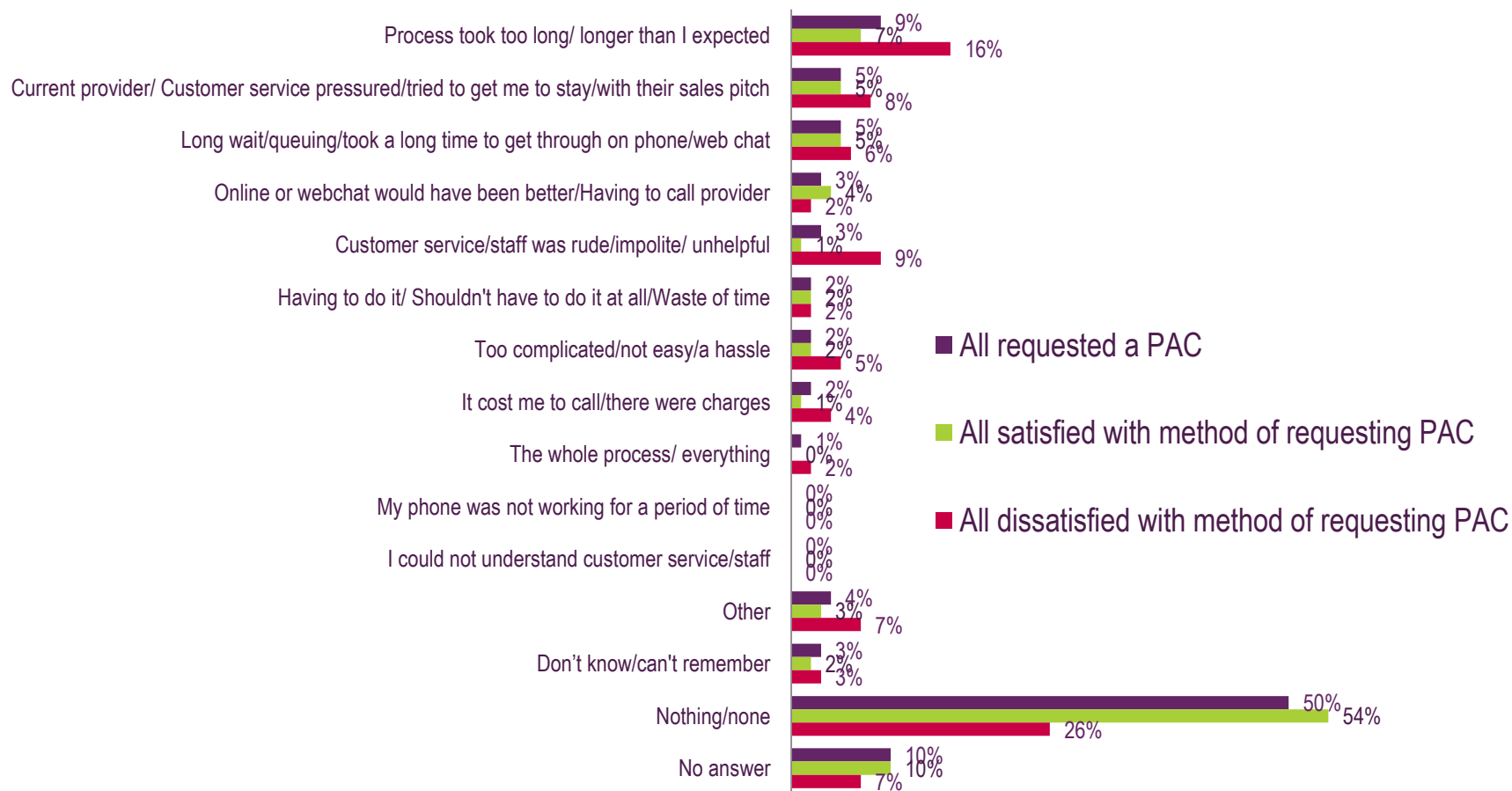
Base sizes below 100 for other contact methods



For respondents that mentioned reasons for disliking the method of requesting a PAC, these were related largely to it being a long process, feeling in a pressured sales environment, or a long waiting time in telephone queues

Aspects disliked about the method of requesting a PAC

By satisfaction with method of requesting PAC



Q. What, if anything, was there about [this method/these methods] of requesting a PAC that you did not like? (unprompted)

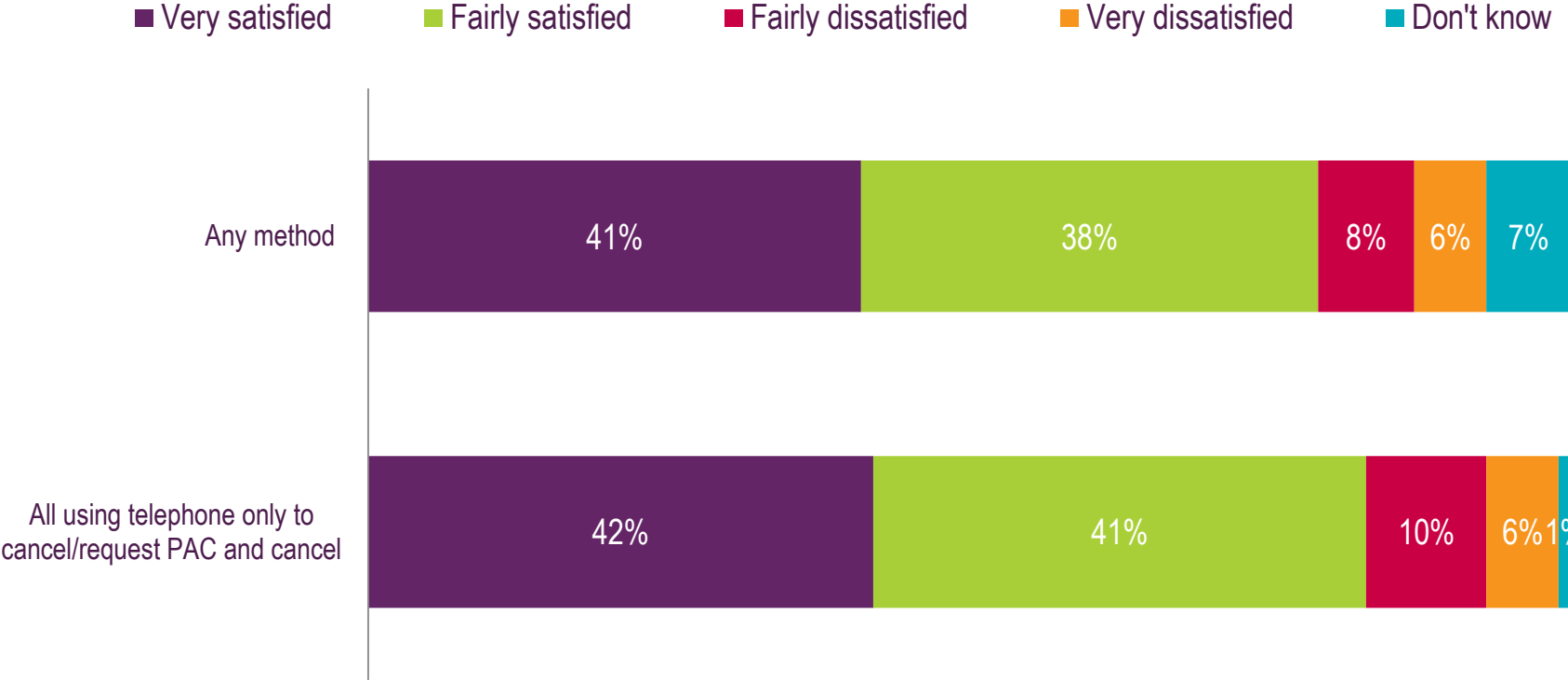
N.B. some respondents mentioned aspects they liked for this question. These have not been shown in the chart, therefore the sum of responses may equal less than 100%.

Base: All requested a PAC: Any method = 1355, all satisfied with method of requesting PAC = 1107, all dissatisfied with method of requesting PAC = 209

Base sizes below 100 for other contact methods

Similar to satisfaction with requesting a PAC, the majority of those cancelling their service were either very or fairly satisfied with the method used

Satisfaction with method of cancelling service

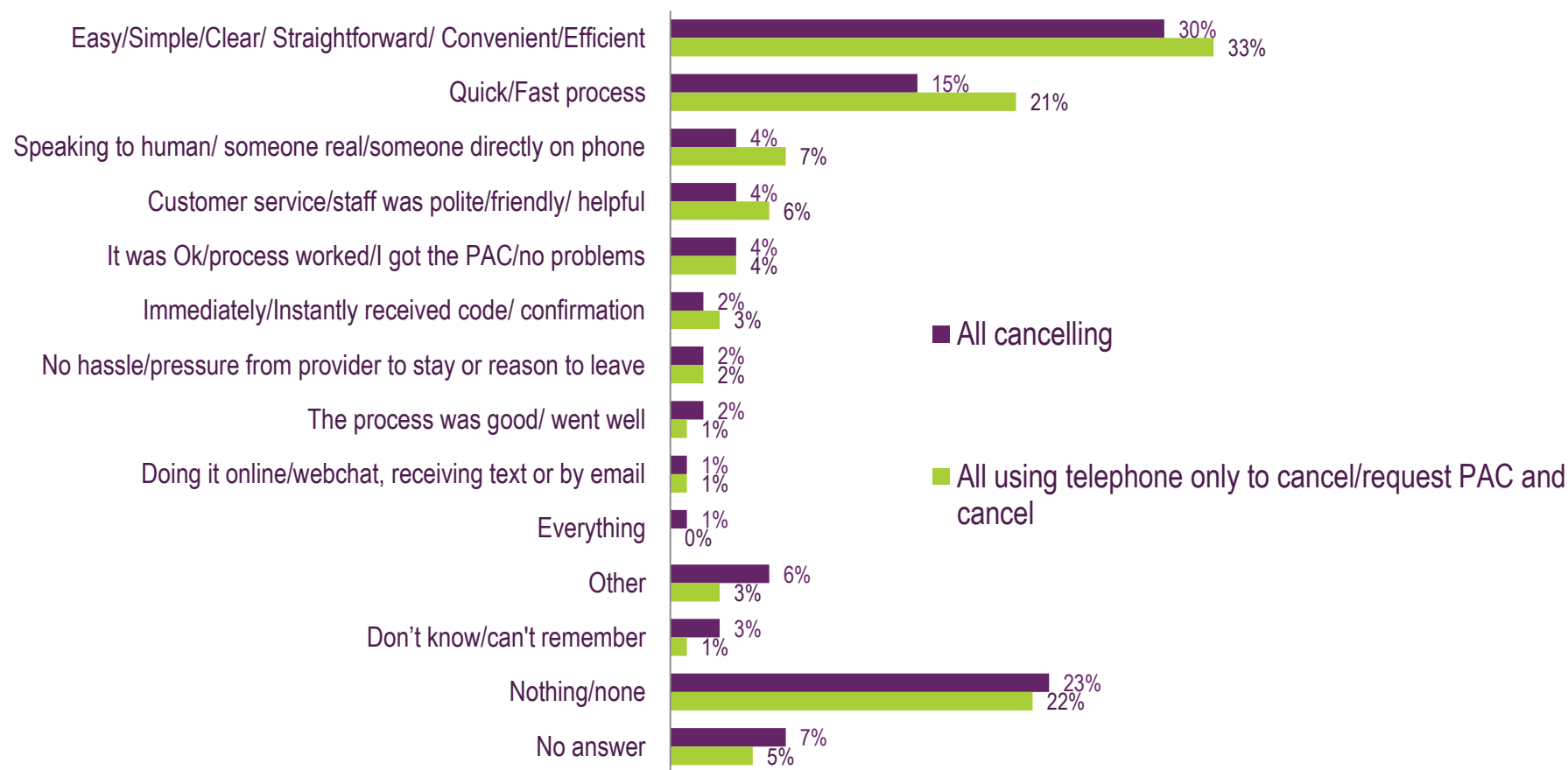


Q. How satisfied were you with [this method/these methods] of cancelling your service?

Base: All cancelling service: Any method = 1828, all using telephone only to cancel/request a PAC and cancel = 854
 Base sizes below 100 for other contact methods

The method used for cancelling was liked, largely for being an easy or straightforward experience

Aspects liked about the method of cancelling



Q. What, if anything, was there about [this method/these methods] of cancelling that you liked? (unprompted)

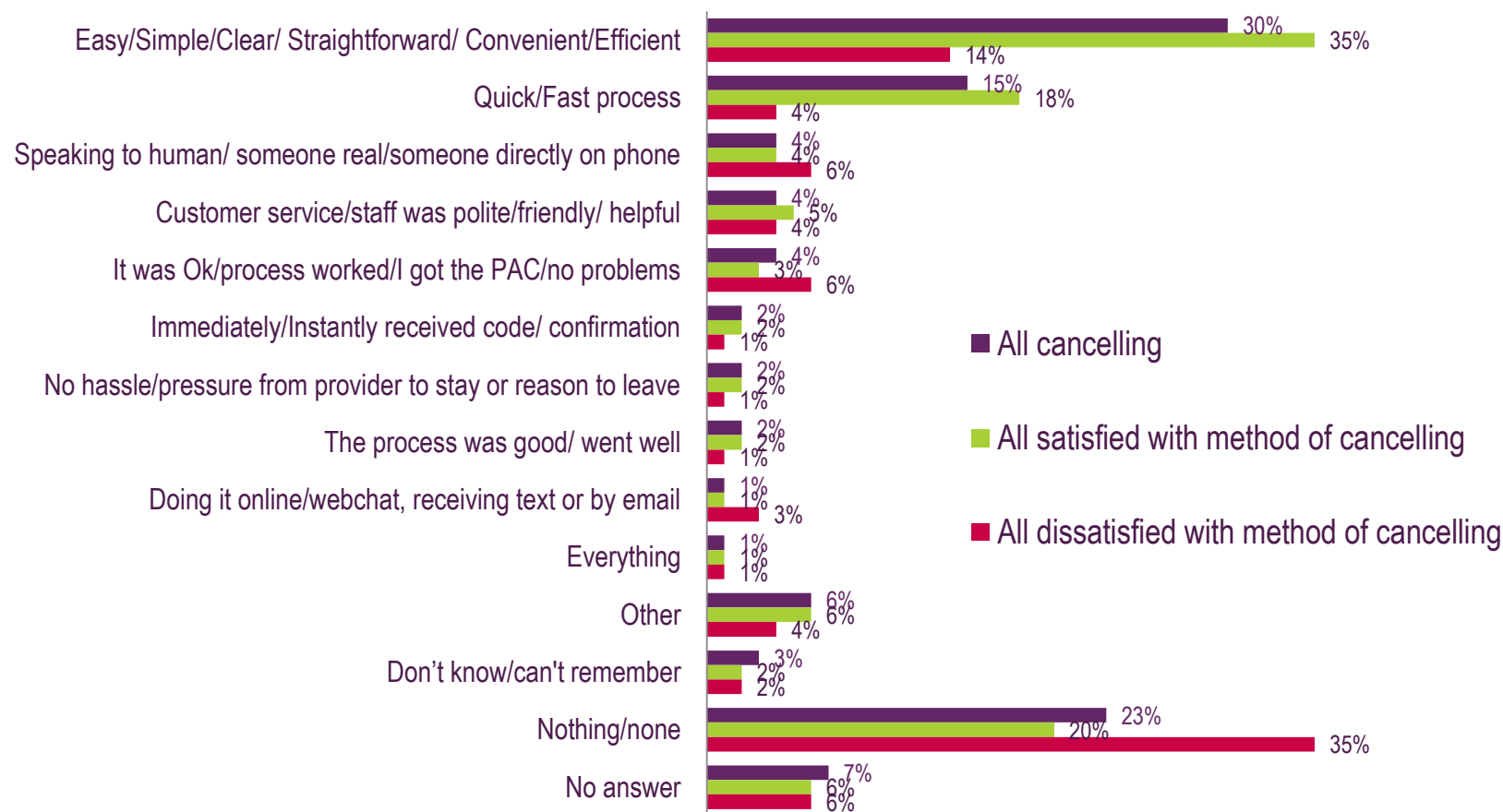
N.B. some respondents mentioned aspects they disliked for this question. These have not been shown in the chart, therefore the sum of responses may equal less than 100%.

Base: All cancelling service: Any method = 1828, all using telephone only to cancel/request a PAC and cancel = 854

Base sizes below 100 for other contact methods

The method used for cancelling was liked, largely for being an easy or straightforward experience

Aspects liked about the method of cancelling By satisfaction with method of cancelling



Q. What, if anything, was there about [this method/these methods] of cancelling that you liked? (unprompted)

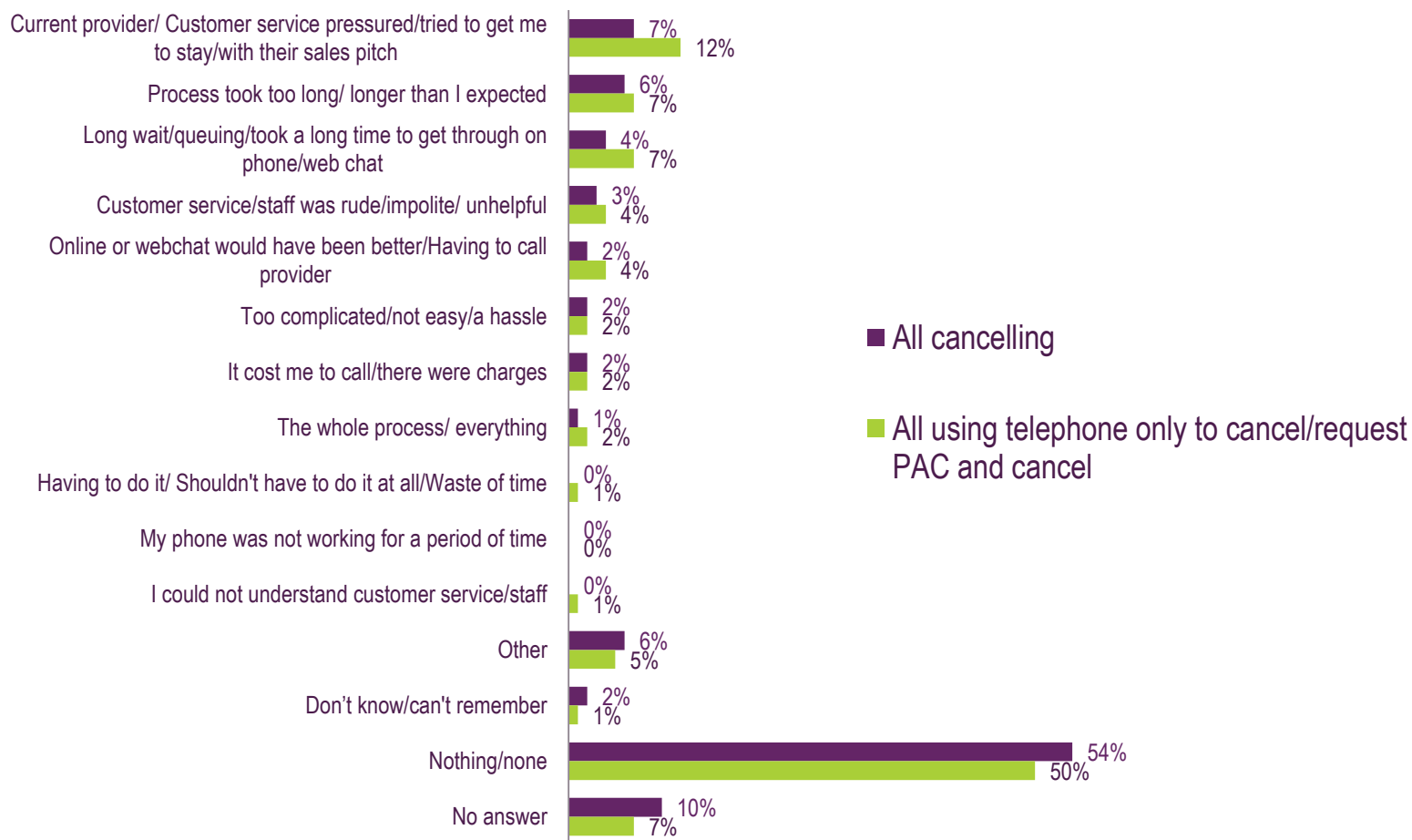
N.B. some respondents mentioned aspects they disliked for this question. These have not been shown in the chart, therefore the sum of responses may equal less than 100%.

Base: All cancelling service: Any method = 1828, all satisfied with method of cancelling = 1449, all dissatisfied with method of cancelling = 254

Base sizes below 100 for other contact methods

For respondents that mentioned reasons for disliking the method of cancelling, these were related largely to feeling in a pressured sales environment, taking too long or a long waiting time in telephone queues

Aspects disliked about the method of cancelling



Q. What, if anything, was there about [this method/these methods] of cancelling that you did not like? (unprompted)

N.B. some respondents mentioned aspects they liked for this question. These have not been shown in the chart, therefore the sum of responses may equal less than 100%.

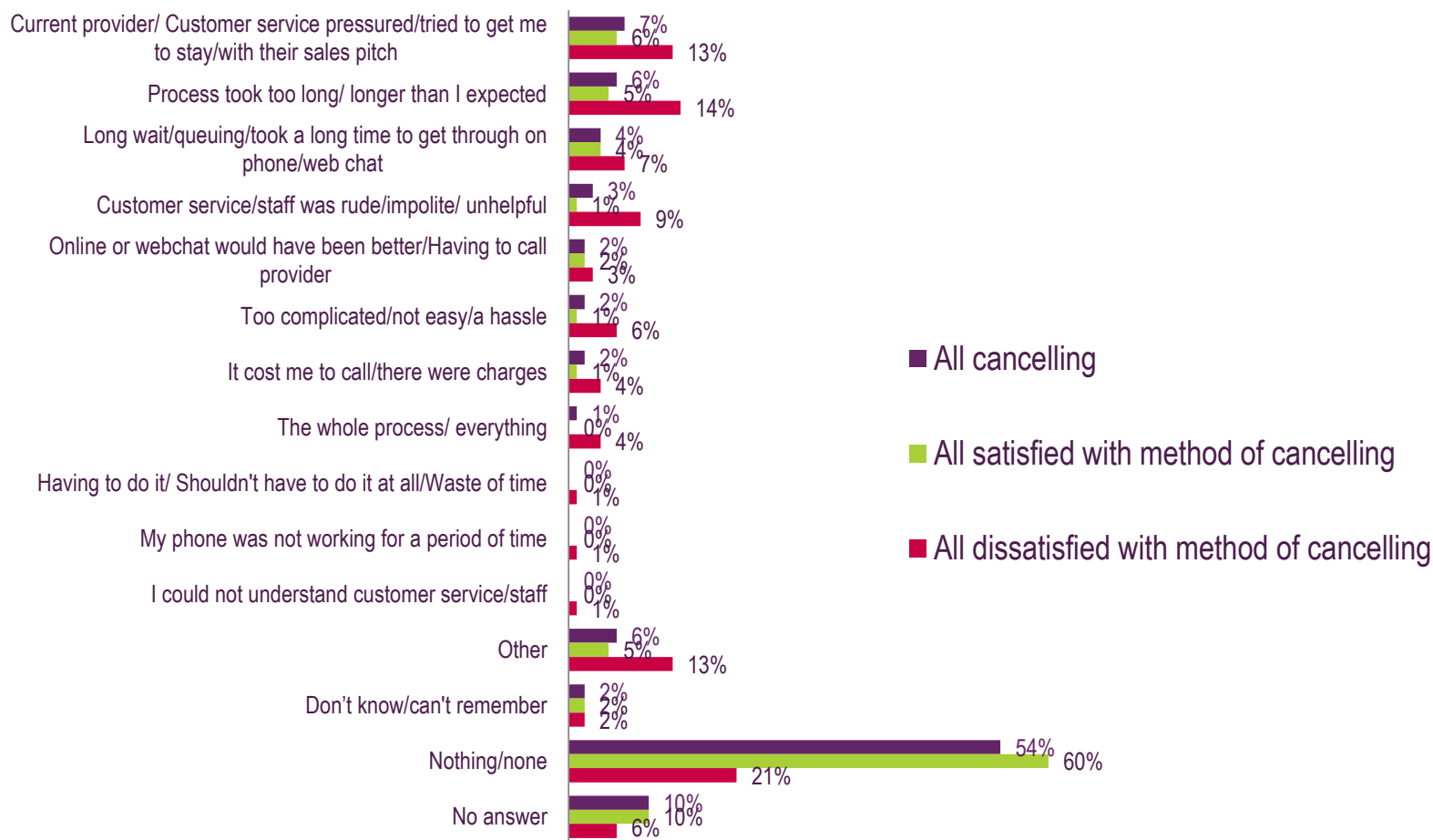
Base: All cancelling service: Any method = 1828, all using telephone only to cancel/request a PAC and cancel = 854

Base sizes below 100 for other contact methods

For respondents that mentioned reasons for disliking the method of cancelling, these were related largely to feeling in a pressured sales environment, taking too long or a long waiting time in telephone queues

Aspects disliked about the method of cancelling

By satisfaction with method of cancelling



Q. What, if anything, was there about [this method/these methods] of cancelling that you did not like? (unprompted)

N.B. some respondents mentioned aspects they liked for this question. These have not been shown in the chart, therefore the sum of responses may equal less than 100%.

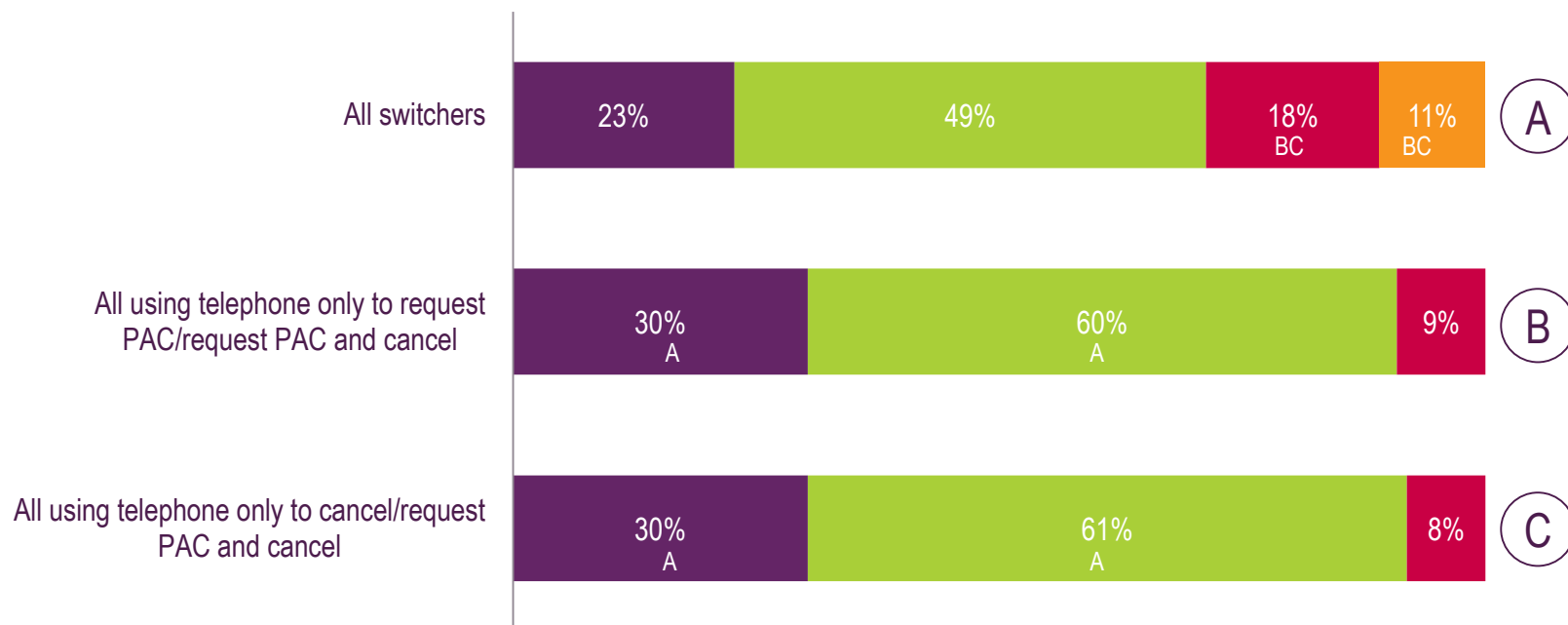
Base: All cancelling service: Any method = 1828, all satisfied with method of cancelling = 1449, all dissatisfied with method of cancelling = 254

Base sizes below 100 for other contact methods

A quarter of switchers recalled discussing other matters with their previous provider when requesting the PAC/ cancelling. Rising to around one in three for telephone. One in ten switchers did not speak to their previous provider

Proportion discussing other things with previous provider when requested PAC/ cancelled service and what these things were

■ Discussed other things ■ No only discussed PAC/cancellation ■ Don't know/ can't recall ■ Did not speak to previous provider



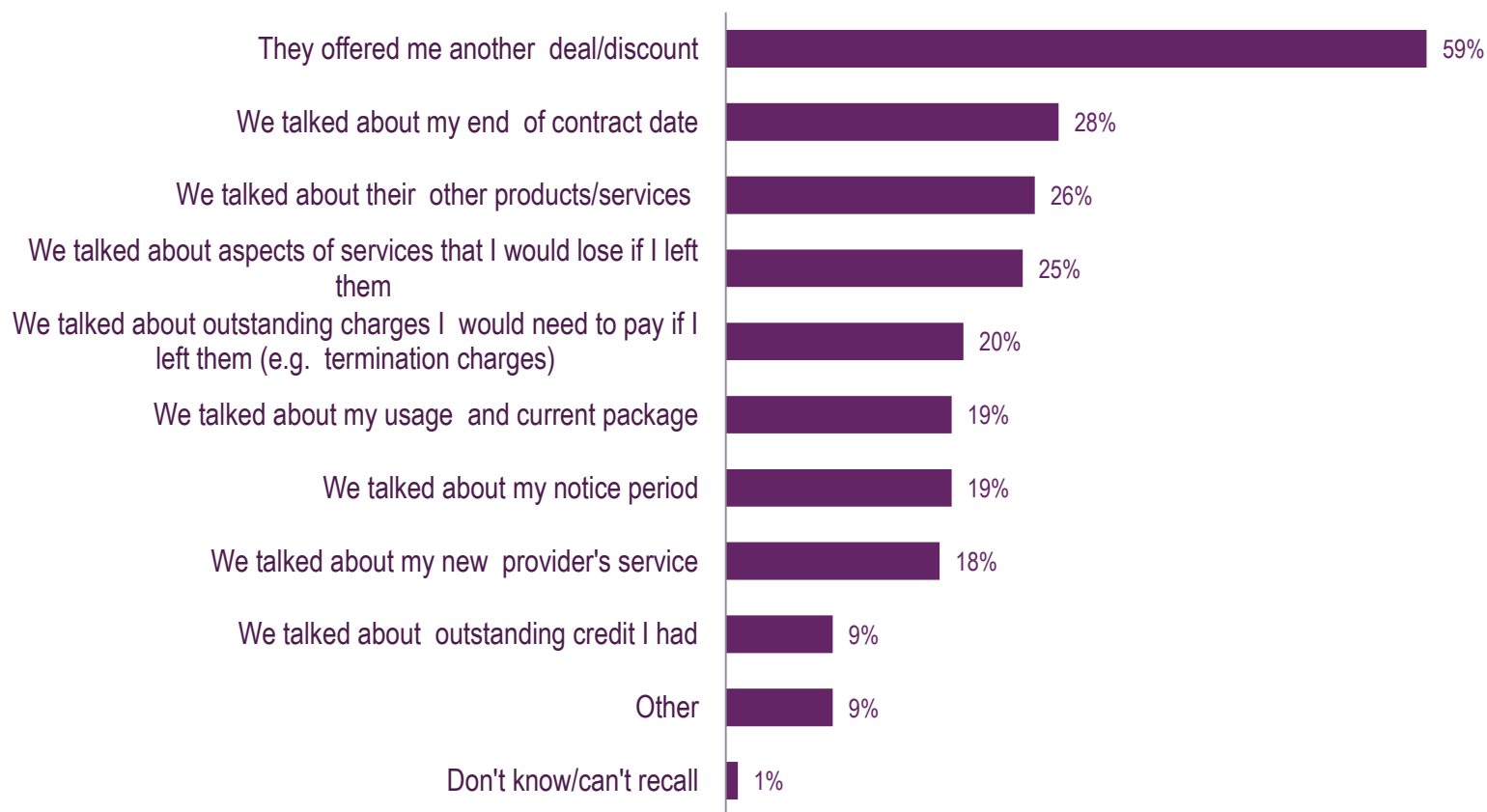
Q. Did you and your previous provider talk about anything else when you requested your PAC and cancelled your service/requested your PAC/cancelled your service?

Base: All who switched in the last 18 months = 2009, all using telephone only to request a PAC/request a PAC and cancel = 721, all using telephone only to cancel/request a PAC and cancel = 854

Base sizes below 100 for other contact methods

Where discussion of other matters were recalled, this was largely sales content (offering another deal or discount, other products or services), but also specific matters about ending service

What else was discussed when called to request PAC or cancel



Q. What else did you talk about [when called to request PAC or cancel service]? (prompted)

Base: All who talked about something else = 454

Attitudes towards reform options

PAC Switchers

Reform option diagrams

PAC Switchers

Auto-Switch SMS PAC Switchers

If you were to do this, the PAC would be texted back to you immediately.

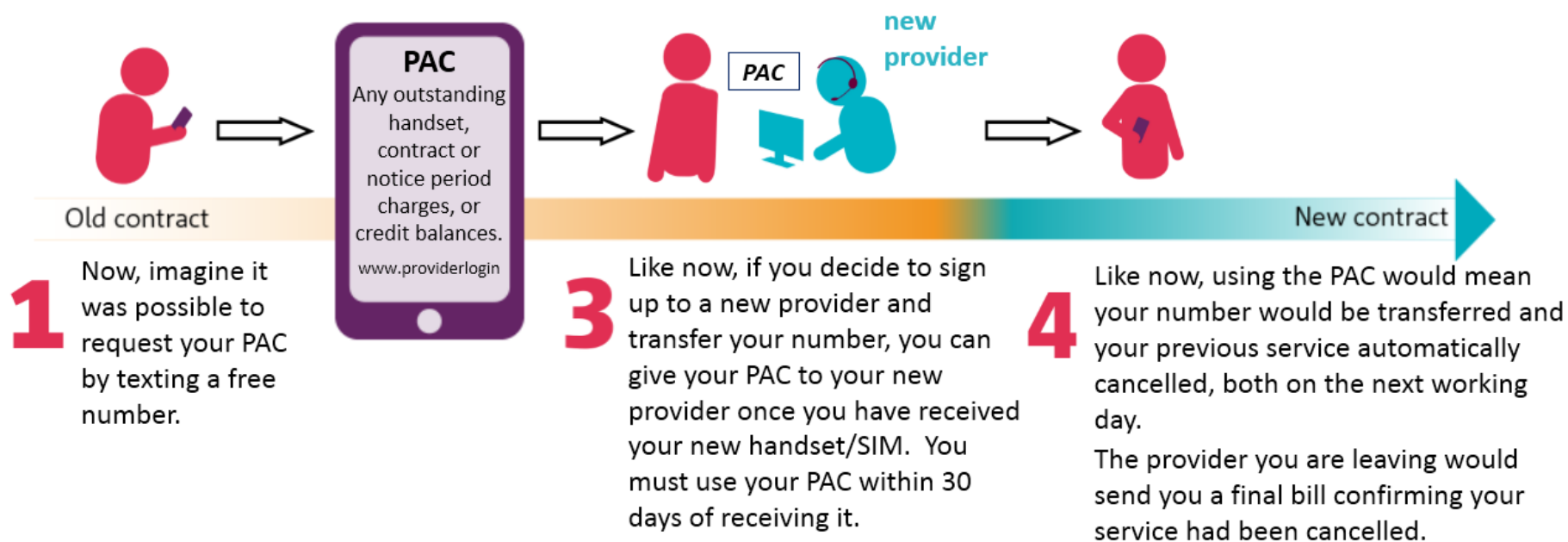
The text would include information from your current provider about any outstanding handset, contract or notice period charges you may owe your current provider if you switched at that point.*

For pay as you go customers, it would include information on any credit balances you might lose.*

2

The text would also include a link to your online account if you have one, in case you wanted further information.

*Information about these outstanding charges or credit balances would also be available at any time, by texting a shortcode or by accessing your online account.



Auto-Switch Online PAC Switchers

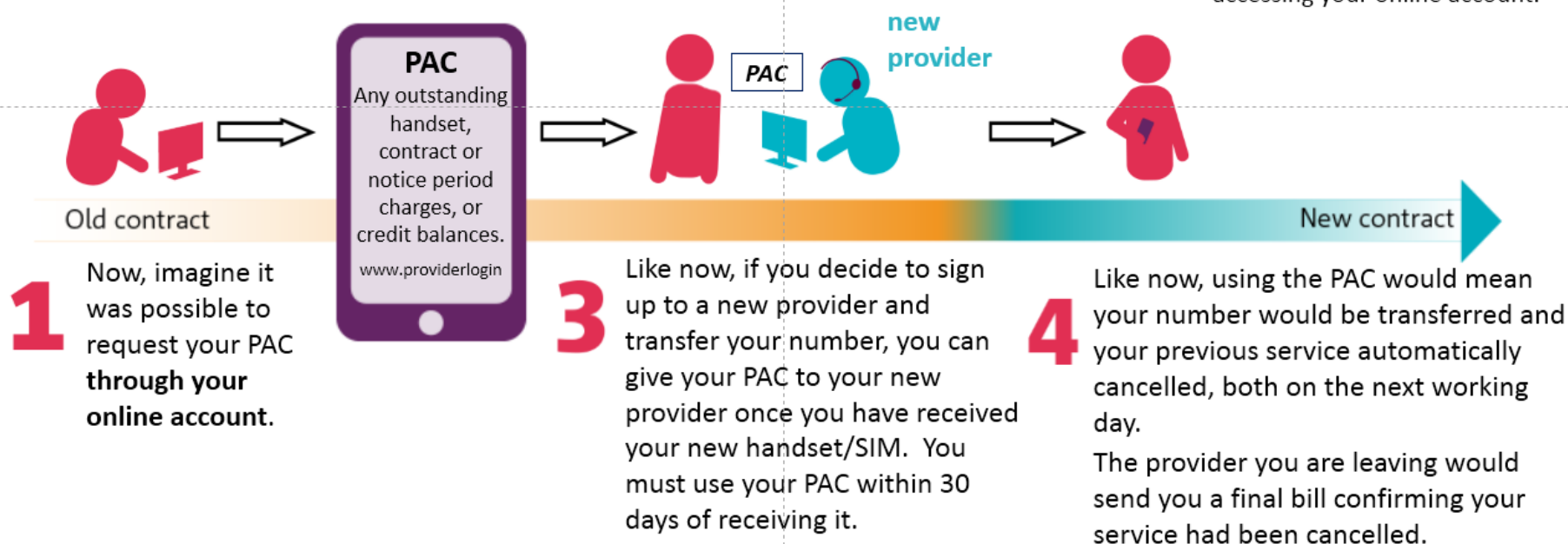
If you were to do this, the PAC would **be displayed onscreen and also texted back to you immediately**, alongside information from your current provider about any outstanding handset, contract or notice period charges you may owe your current provider if you switched at that point.*

For pay as you go customers, it would include information on any credit balances you might lose.*

2

The text would also include a link to your online account if you have one, in case you wanted further information.

*Information about these outstanding charges or credit balances would also be available at any time, by texting a shortcode or by accessing your online account.



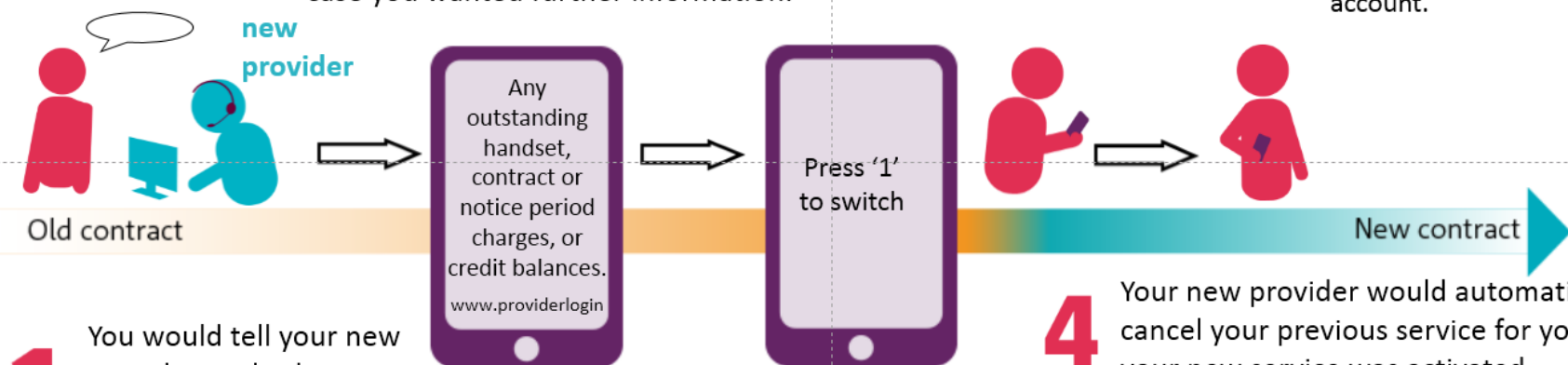
GPL PAC Switchers

Your new provider would arrange for you to receive a text during the sales conversation. This would give you information from your current provider about any outstanding handset, contract or notice period charges you may owe your current provider if you switched at that point.*

For pay as you go customers, it would include information on any credit balances you might lose.*

The text would also include a link to your online account if you have one, in case you wanted further information.

*Information about these outstanding charges or credit balances would also be available at any time, by texting a shortcode or by accessing your online account.

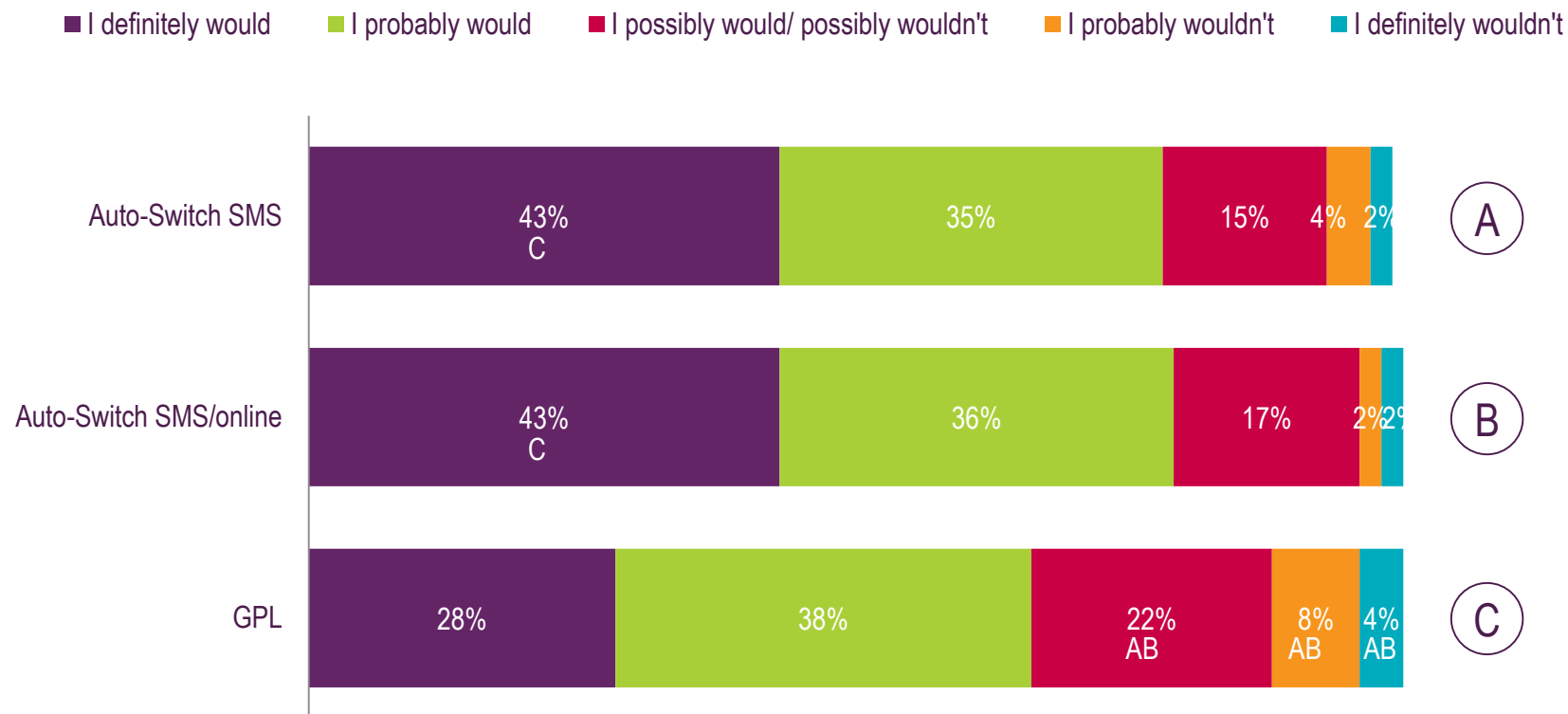


Attitudes towards reform options

PAC Switchers Summary

PAC switchers were more likely to claim they would definitely use an Auto-Switch SMS or SMS/online route instead of the way they switched last time

Interest in alternative switching methods compared to way they switched/requested their PAC previously: Summary (before price options provided) – PAC Switchers



Q. How likely would you be to request your PAC via a free text message rather than the way you requested it last time you switched?
 Q. How likely would you be to request your PAC online rather than texting a free number/rather than the way you requested your PAC last time?
 Q. How likely would you be to use this method, rather than the way you switched last time you switched?

Base: All PAC switched in the last 18 months = 1251

Attitudes towards Auto-Switch SMS PAC Switchers

Over three in four stated they would use the Auto-Switch SMS route rather than the way they switched previously

PAC switchers – Auto-Switch SMS only

Take up

	Take-up (stated)	Take-up (down-weighted – 80/20)
	n=1251	n=1251
Base	All PAC switchers	All PAC switchers
Definitely would	43%	34%
Probably would	35%	7%
Net: 'would'	78%	41%
Possibly/Possibly not	15%	n/a
Probably wouldn't	4%	n/a
Definitely wouldn't	2%	n/a

Q. How likely would you be to request your PAC via a free text message rather than the way you requested it last time you switched?

Example reasons why would or why wouldn't use Auto-Switch SMS

Why would use

It's a quick and simple process not having to talk to employees

I would hope it would be quicker than hanging on the end of a telephone

Easy, quick and no pressure to remain

Sounds much easier to organise and also much quicker for the number to become active on the new network

Not having the pressure selling over the phone would make it less stressful

I can do it any time of the day

Why wouldn't use

Its far too complicated just to send a message, I do not get this system at all

Well it sounds easy, but it's easier to go into Carphone Warehouse

It was easy to do on the phone so why try any alternative

I think I can request it online and I would be more likely to do that instead

The whole transaction is too impersonal and I prefer to have contact with people I buy from

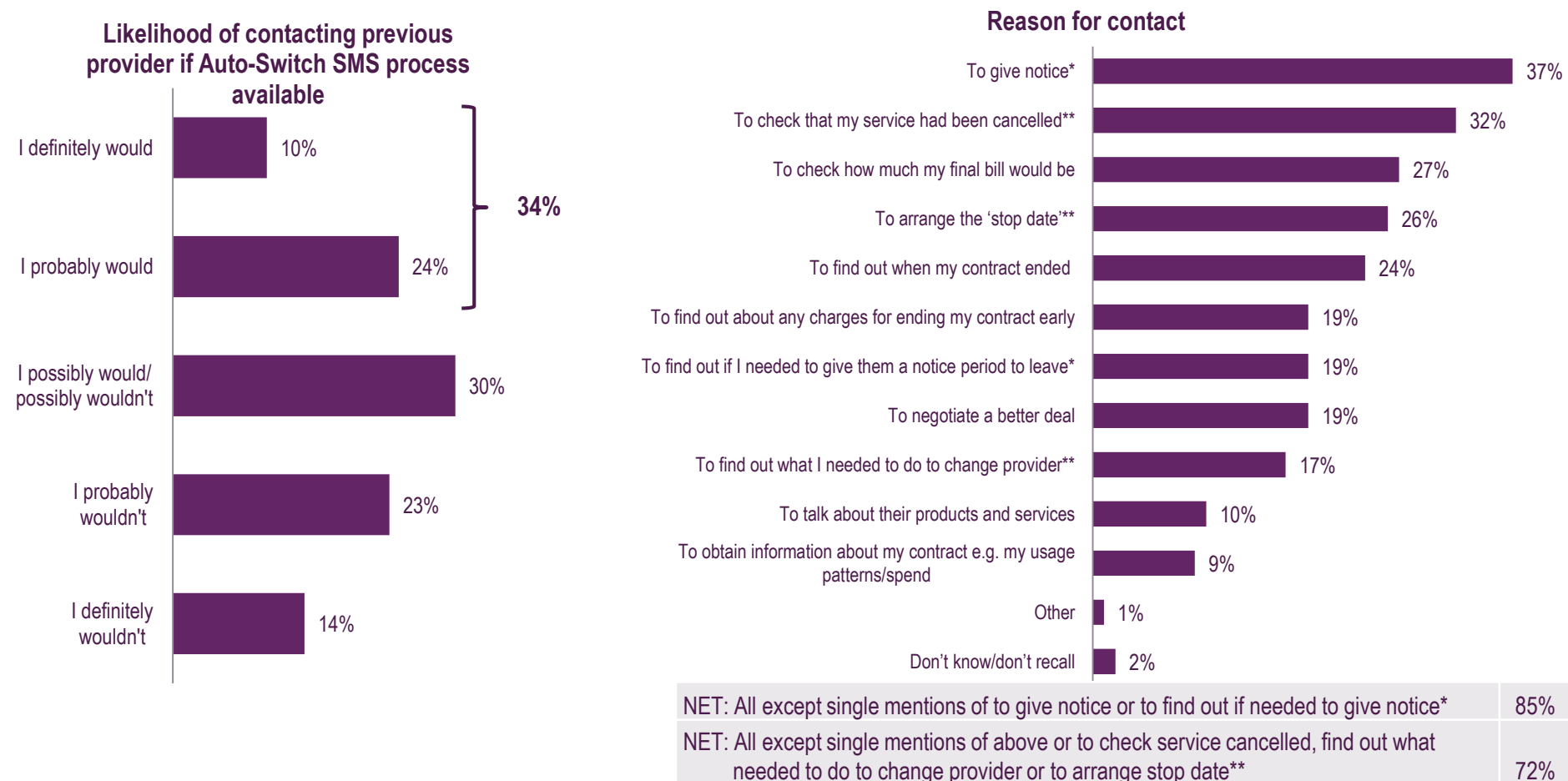
Too time consuming, would probably forget what day you were going to do one thing or another, confusing, too many things going on

Q. Why do you say you would/might request your PAC via a free text message? Unprompted

Q. Why do you say you wouldn't request your PAC via a free text message? Unprompted

One in three said they would definitely or probably contact their previous provider as well if Auto-Switch SMS were available. This was for a variety of purposes concerning the cancellation of the service as well as details about ending their contract

Likelihood of contacting previous provider if had used Auto-Switch SMS process last time they switched and anticipated reasons for this contact



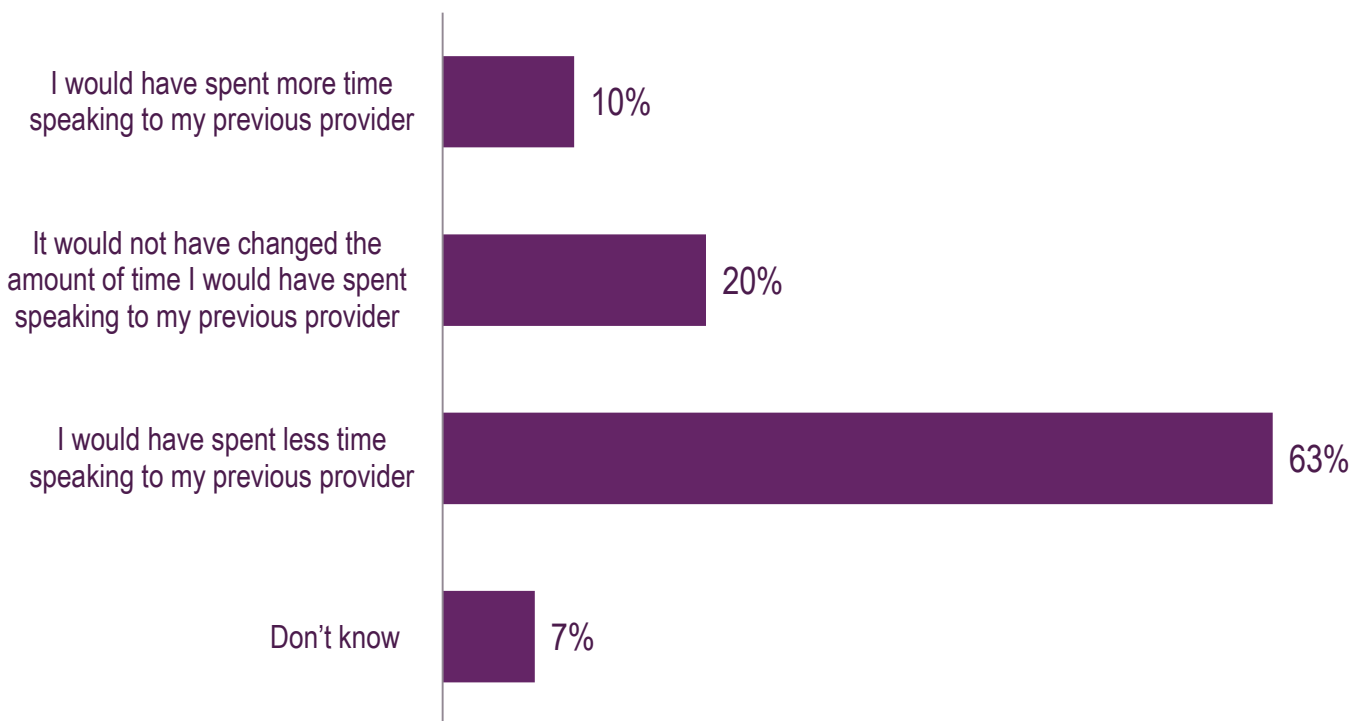
Q. If you had followed these steps last time you switched do you think you would also have contacted your previous provider, either while you were thinking about whether to switch, or to make the switch happen? / Q. Which, if any, of these would be reasons that you would still have contacted your previous provider? (prompted)

Base: All PAC switched in the last 18 months and would definitely or probably take up Auto-Switch SMS = 973

Base for reasons for contact: All PAC switched in the last 18 months, would definitely or probably take up Auto-Switch SMS and would definitely or probably have still contacted previous provider = 326

Although some (34%) PAC switchers said they would still have spoken to their previous provider if they had used the Auto-Switch SMS route last time they switched, around two thirds of these thought they would have spent less time talking to them

Anticipated time impact if had contacted previous provider using Auto-Switch SMS process last time they switched



Q. How, if at all, do you think this new method of requesting your PAC would have affected the total amount of time you would have spent speaking to your previous provider, either while you were thinking about whether to switch, or to make the switch happen?

Among those that said they would use an Auto-Switch SMS route, one in three said they would definitely be willing to pay for it at a 50p level, one in five at the £1 level

Willingness to pay (WTP): Auto-Switch SMS – PAC Switchers

Stated willingness to pay

■ I definitely would ■ I probably would ■ I possibly would/ possibly wouldn't ■ I probably wouldn't ■ I definitely wouldn't



Reasons would not pay at lowest price (50p)

Because I should not have to pay anything for this option	66%
Because it's not worth paying extra for	48%
Other	5%
Don't know	0%

Q. You said you would request your PAC via a free text message if this method were available? If, instead of being free, there had been a charge to use this method of xx how likely would you be to use this method, rather than the way you requested your PAC last time you switched?

Q. You said you would not take up this option if there was a 50p charge. Why do you say this?

Base: All PAC switched in the last 18 months and would definitely or probably take up Auto-Switch SMS answering question = 935

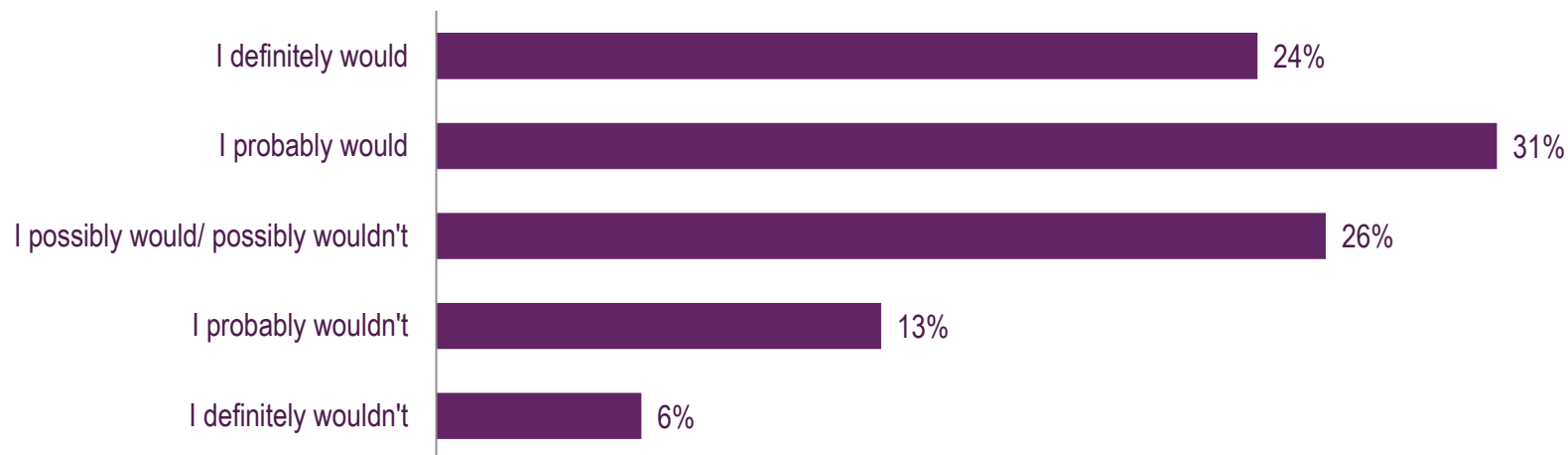
Base for reasons would not pay: All PAC switched in the last 18 months and would definitely or probably not take up Auto-Switch SMS at all price options = 238

Attitudes towards Auto-Switch online option PAC Switchers

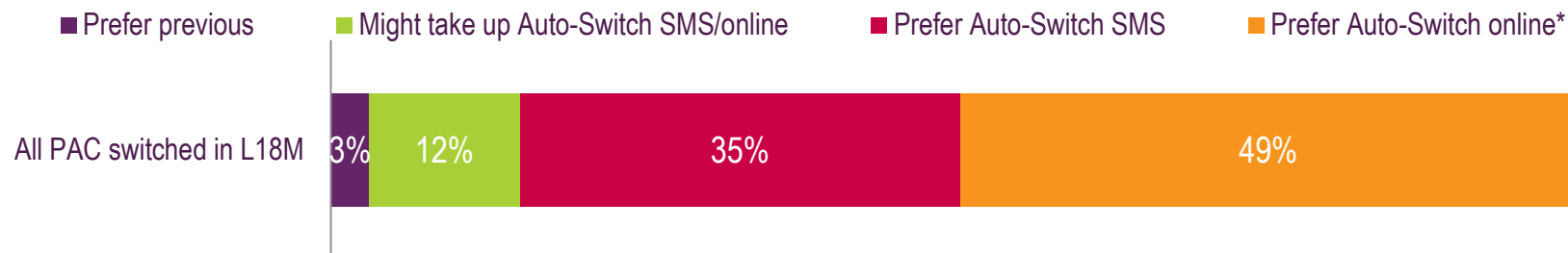
Over half (55%) of those who said they would use an Auto-Switch SMS route, said they would definitely or probably prefer the online route

Likelihood of using Auto-Switch online route rather than Auto-Switch SMS

Prefer Auto-Switch online vs. Auto-Switch SMS



Overall Auto-Switch preference



Q. How likely would you be to request your PAC online rather than texting a free number?

*Preference for Auto-Switch online includes 61 respondents who said they 'might' use the Auto-Switch SMS option rather than the way they switched previously, but would 'definitely or probably' use an online route over the SMS route. For the purposes of the combined Auto-Switch SMS/online take-up reported elsewhere, these respondents have been classified as 'might' take up.

Base: All PAC switched in the last 18 months who would definitely or probably take-up Auto-Switch SMS = 973

Base: All PAC switched in the last 18 months = 1251

Example reasons why would or why wouldn't use Auto-Switch online

Why would use

I have free Internet at home and am always on it it's easier to use a PC.

Easier than texting, faster and more efficient.

I would use this method as there are extra barriers in place as if someone got a hold of your phone, they'd also need to get your account details to mess around with your phone.

It would be more safer to speak to a web chat adviser rather than it being sent by SMS.

If I have an online account that gives me this amount of information and control. It would make more sense to do everything possible from this site and keep a record.

Easy to go online. Can't receive a text if you may not have a phone at the time.

Why wouldn't use

In my opinion it takes a while to get access to an online account when you are older.

A text message would be more convenient.

It's easier by text. Can do it anywhere anytime.

Because it would take longer to login online than to send a text on my mobile.

Not sure of the security of doing this online.

They might have the wrong information or I haven't got the new account details yet

Q. Why do you say you would/might request your PAC via your online account?

Q. Why do you say you wouldn't request your PAC via your online account?

Attitudes towards Auto-Switch SMS/online option PAC Switchers

Four in five stated they would use the Auto-Switch SMS/online route rather than the way they switched previously

PAC switchers – Auto-Switch SMS and/or online

Take up

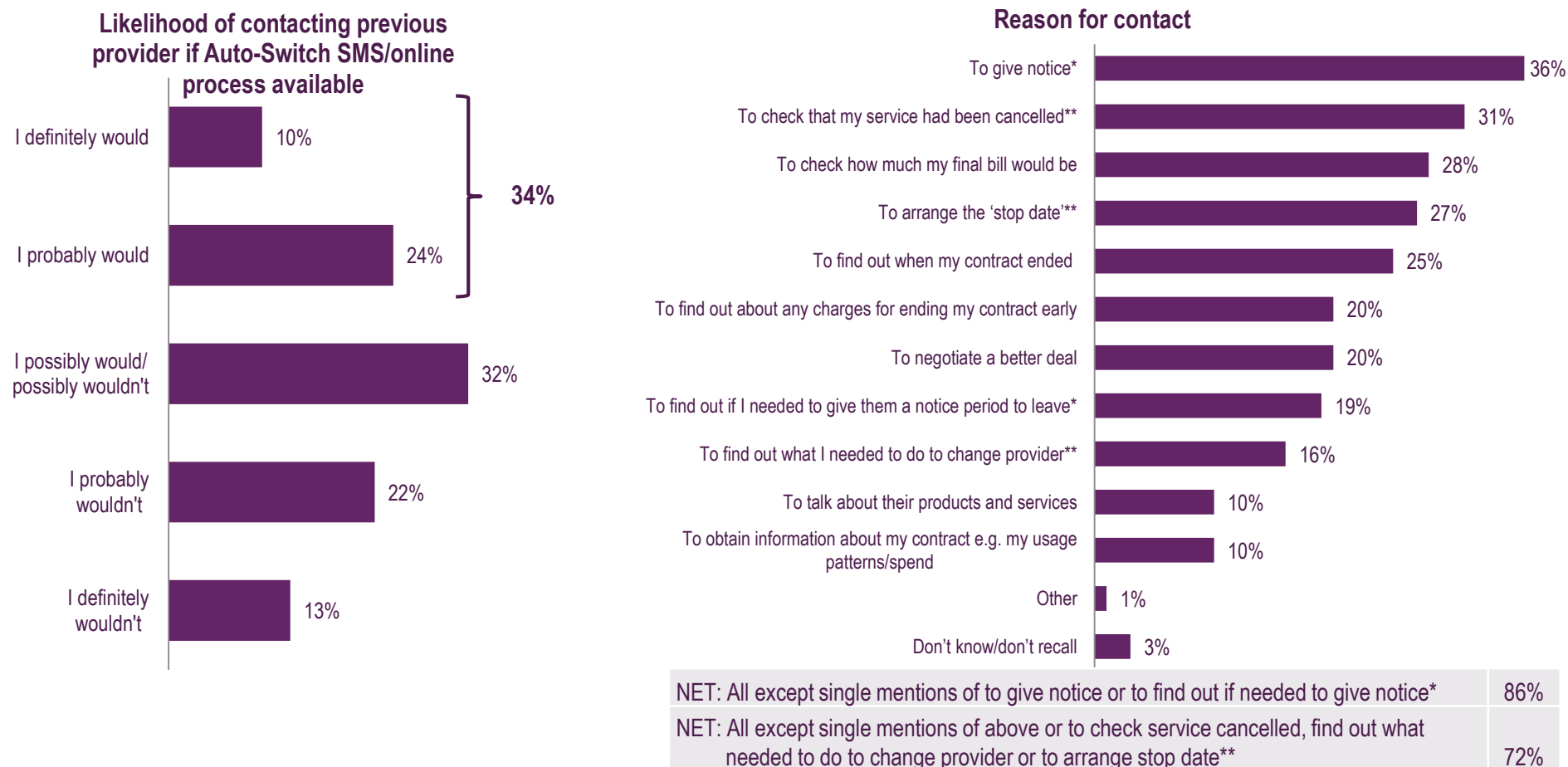
	Take-up (stated)	Take-up (down-weighted – 80/20)
	n=1251	n=1251
Base	All PAC switchers	All PAC switchers
Definitely would	43%	35%
Probably would	36%	7%
Net: 'would'	80%	42%
Possibly/Possibly not	17%	n/a
Probably wouldn't	2%	n/a
Definitely wouldn't	2%	n/a

Q. How likely would you be to request your PAC via a free text message rather than the way you requested it last time you switched?

Q. How likely would you be to request your PAC online rather than texting a free number?

One in three said they would definitely or probably have contacted their previous provider if they had used Auto-Switch SMS or online the last time they switched - for a variety of purposes concerning giving notice and information about ending their contract

Likelihood of contacting previous provider if had used Auto-Switch SMS/online process last time they switched and anticipated reasons for this contact



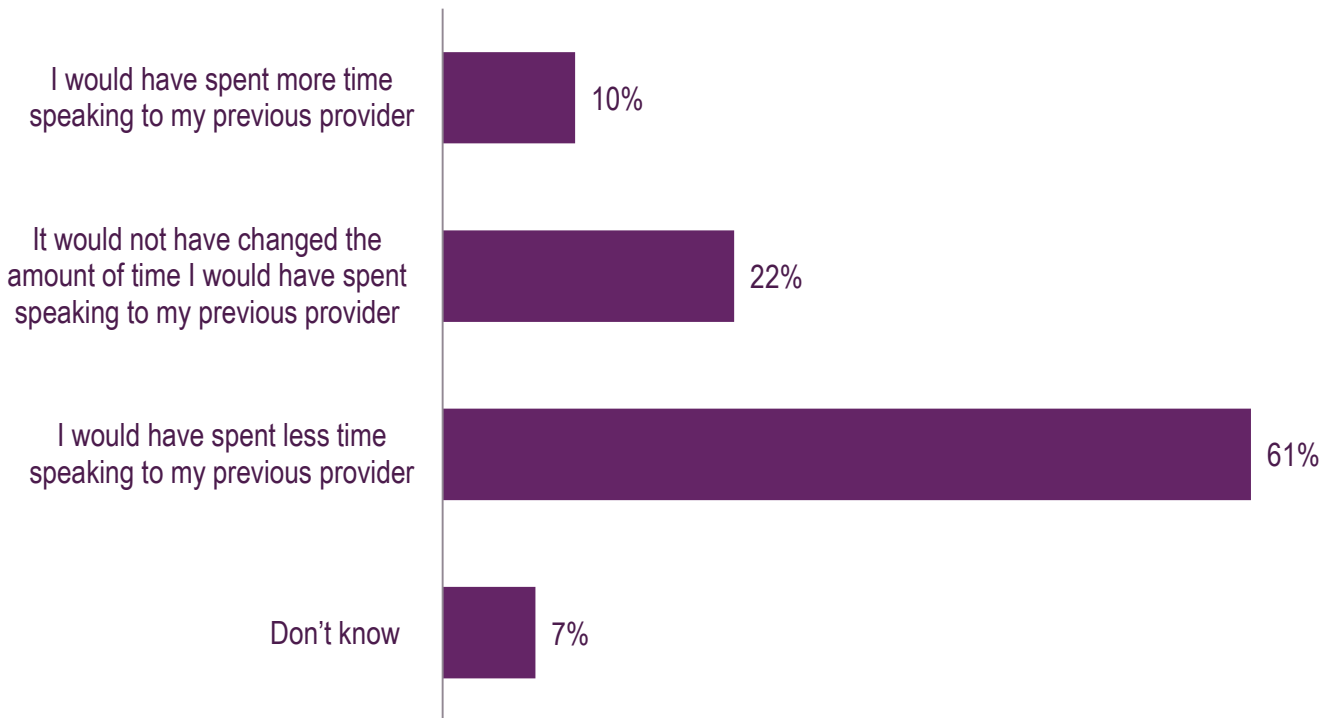
Q. If you had followed these steps last time you switched do you think you would also have contacted your previous provider, either while you were thinking about whether to switch, or to make the switch happen? / Q. Which, if any, of these would be reasons that you would still have contacted your previous provider? (prompted)

Base: All PAC switched in the last 18 months and would definitely or probably take up Auto-Switch SMS or Auto-Switch Online = 1058

Base: All PAC switched in the last 18 months, would definitely or probably take up Auto-Switch SMS/Online and would definitely or probably have still contacted previous provider = 355

Although some (34%) PAC switchers said they would still have spoken to their previous provider if they had used the Auto-Switch SMS/online route the last time they switched, around three in five thought they would have spent less time talking to them

Anticipated time impact if had contacted previous provider using Auto-Switch SMS/online process last time they switched



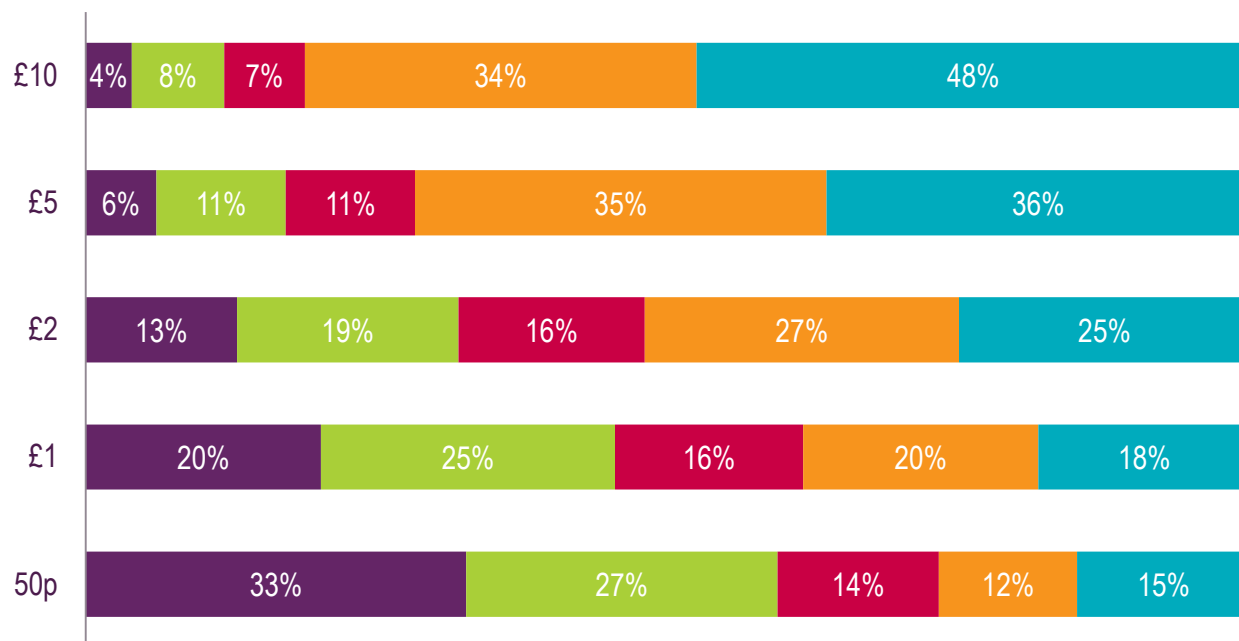
Q. How, if at all, do you think this new method of requesting your PAC would have affected the total amount of time you would have spent speaking to your previous provider, either while you were thinking about whether to switch, or to make the switch happen?

Among those that said they would use an Auto-Switch SMS or online route, one in three said they would definitely be willing to pay for it at a 50p level, one in five at the £1 level

Willingness to pay (WTP): Auto-Switch SMS/online – PAC Switchers

Stated willingness to pay

■ I definitely would ■ I probably would ■ I possibly would/ possibly wouldn't ■ I probably wouldn't ■ I definitely wouldn't



Reasons would not pay at lowest price (50p)

Because I should not have to pay anything for this option	66%
Because it's not worth paying extra for	48%
Other	6%
Don't know	0%

Q. You said you would request your PAC via a free text message / your online account if this method were available. If, instead of being free, there had been a charge to use this method of xx how likely would you be to use this method, rather than the way you requested your PAC last time you switched? / Q. You said you would not take up this option if there was a 50p charge. Why do you say this?

Base: All PAC switched in the last 18 months and would definitely or probably take up Auto-Switch SMS or would take up Auto-Switch Online answering question = 959

Base: All PAC switched in the last 18 months and would definitely or probably not take up Auto-Switch SMS or would definitely or probably not take up Auto-Switch Online at all price options = 253

Attitudes towards GPL PAC Switchers

Two thirds stated they would use the GPL route rather than the way they switched previously

PAC switchers – GPL

Take up

	Take-up (stated)	Take-up (down-weighted – 80/20)
	n=1251	n=1251
Base	All PAC switchers	All PAC switchers
Definitely would	28%	23%
Probably would	38%	8%
Net: 'would'	66%	30%
Possibly/Possibly not	22%	n/a
Probably wouldn't	8%	n/a
Definitely wouldn't	4%	n/a

Q. How likely would you be to use this method, rather than the way you switched last time you switched?

Example reasons why would or why wouldn't use GPL

Why would use

It is happening in real time through my new provider at little time or energy cost to me.

Simple, immediate and you have someone there for advice if you need it.

It would reduce the number of steps to take.

This method is faster and much simpler as you don't have to deal with two different companies.

It is quick and convenient, saving me the hassle of contacting the old provider and eliminating the chance for them to try sales/retention activities.

Takes the responsibility out of your hands and presumably they would be doing this regularly so it would be easy and uncomplicated for them.

Why wouldn't use

Because I would feel I wasn't in control of the process and anyone having my phone number could pretend to be me and switch without my knowledge.

Again the concept fails to simplify an already simple and quick way of communicating.

I would like to give my current provider the chance to offer me their best deal.

I would rather contact my previous provider to make sure the cancellation had been implemented.

I believe it's not likely because of existing contractual matters with the present provider. I think matters like minutes, texts, contract length remaining or other costs involved with the current provider would make it disadvantageous.

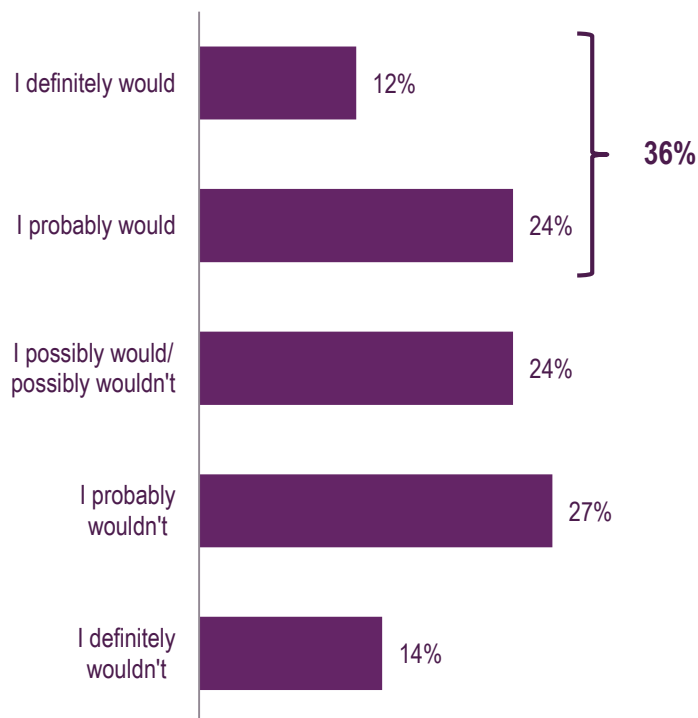
Q. Why do you say you would/might use this method? Unprompted

Q. Why do you say you wouldn't use this method? Unprompted

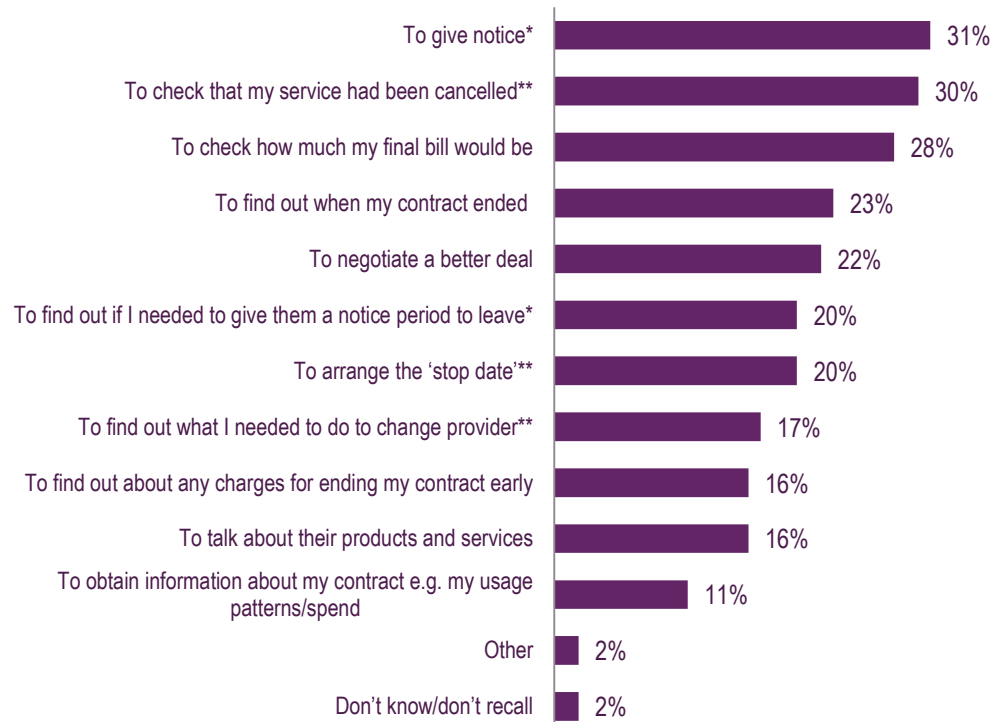
One in three said they would definitely or probably have contacted their previous provider if they had used GPL last time they switched. This was for a variety of purposes - primary reasons to give notice, check on cancellation and the final bill

Likelihood of contacting previous provider if had used GPL process last time they switched and anticipated reasons for this contact

Likelihood of contacting previous provider if GPL process available



Reason for contact



NET: All except single mentions of to give notice or to find out if needed to give notice*	91%
NET: All except single mentions of above or to check service cancelled, find out what needed to do to change provider or to arrange stop date**	75%

Q. If you had followed these steps last time you switched do you think you would also have contacted your previous provider, either while you were thinking about whether to switch, or to make the switch happen?

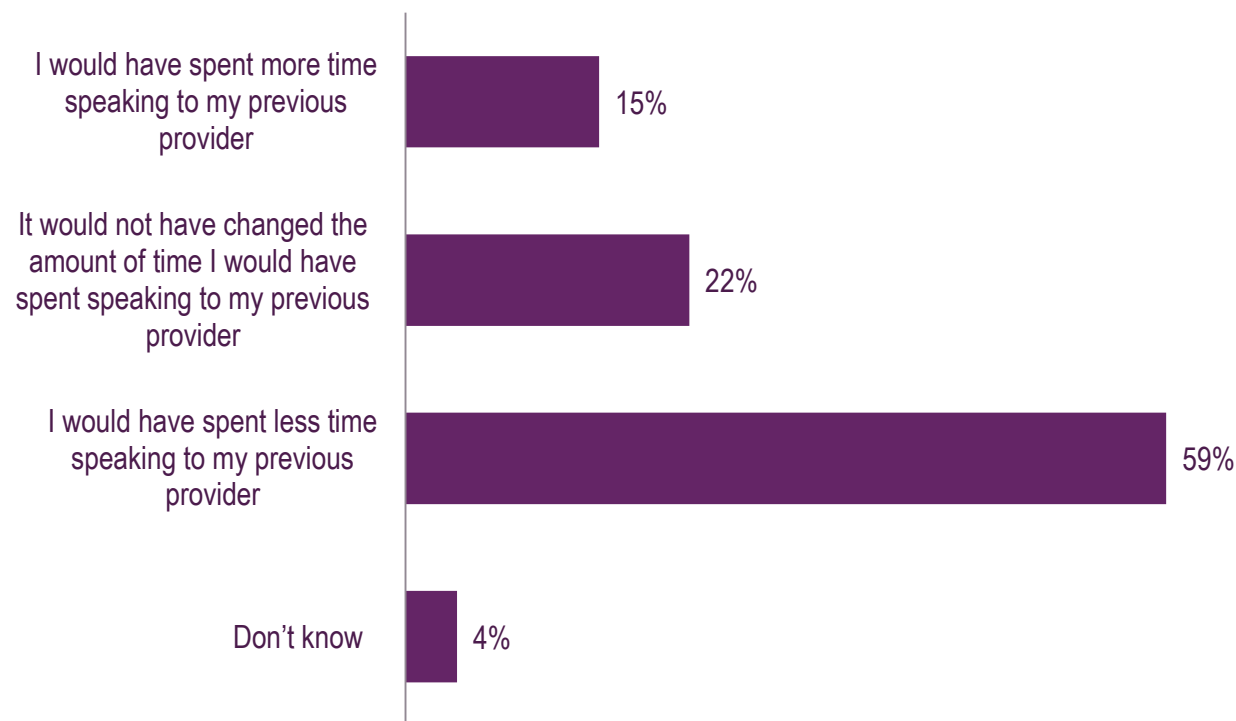
Q. Which, if any, of these would be reasons that you would still have contacted your previous provider? (prompted)

Base: All PAC switched in the last 18 months and would definitely or probably take up GPL = 829

Base: All PAC switched in the last 18 months, would definitely or probably take up GPL and would have still contacted previous provider = 297

Although some (36%) PAC switchers said they would still have spoken to their previous provider if they had used the GPL route the last time they switched, three in five thought they would have spent less time talking to them

Anticipated time impact if had contacted previous provider using GPL process last time they switched

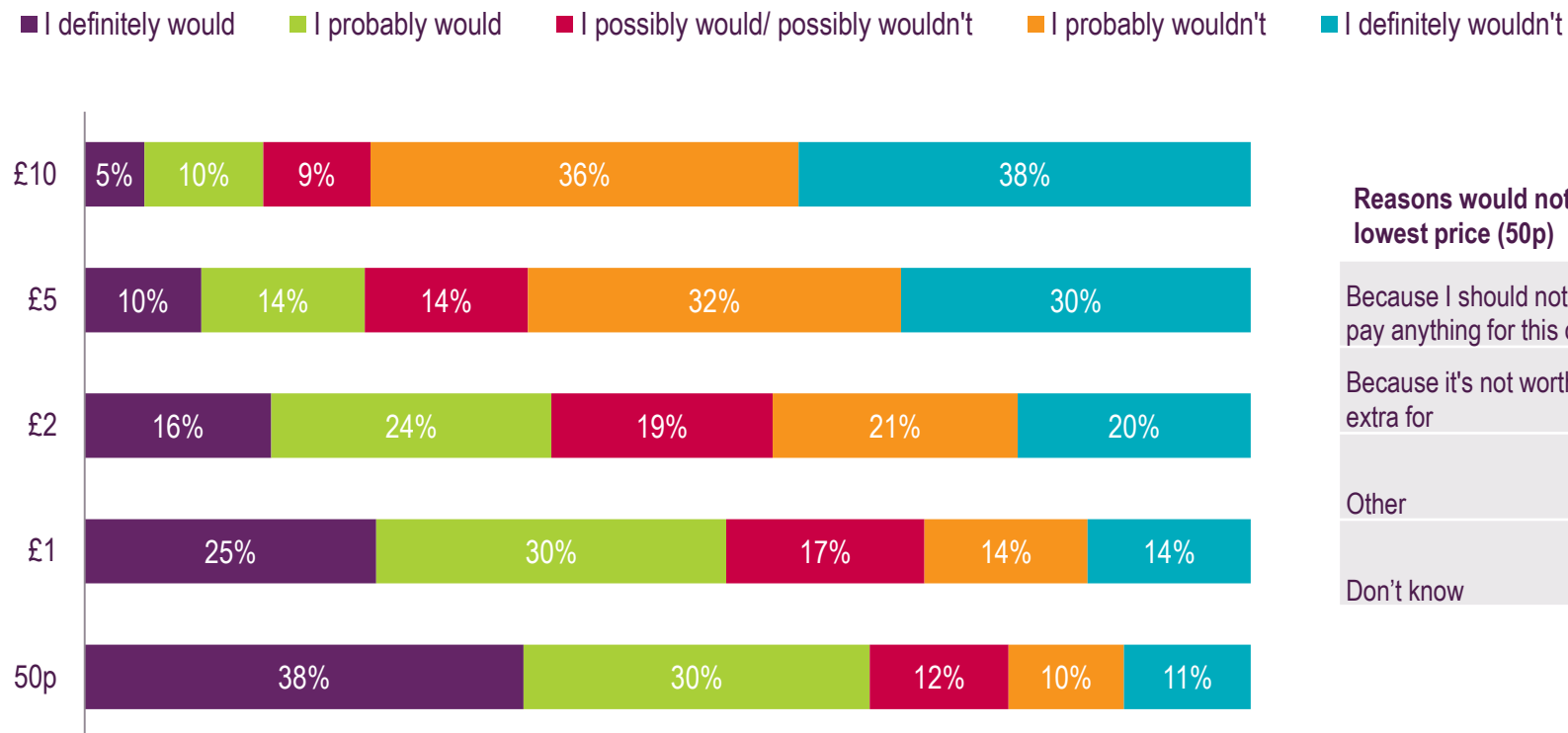


Q. How, if at all, do you think this new method of switching would have affected the total amount of time you would have spent speaking to your previous provider, either while you were thinking about whether to switch, or to make the switch happen?

Among those that said they would use a GPL route, more than one in three said they would definitely be willing to pay for it at a 50p level, one in four at the £1 level

Willingness to pay (WTP): GPL – PAC Switchers

Stated willingness to pay



Reasons would not pay at lowest price (50p)

Because I should not have to pay anything for this option	66%
Because it's not worth paying extra for	47%
Other	5%
Don't know	0%

Q. You said you would use this method of switching if it was available. If, instead of being free, there had been a charge to use this method of xx how likely would you be to use this method, rather than the way you switched last time you switched?

Q. You said you would not take up this option if there was a 50p charge. Why do you say this?

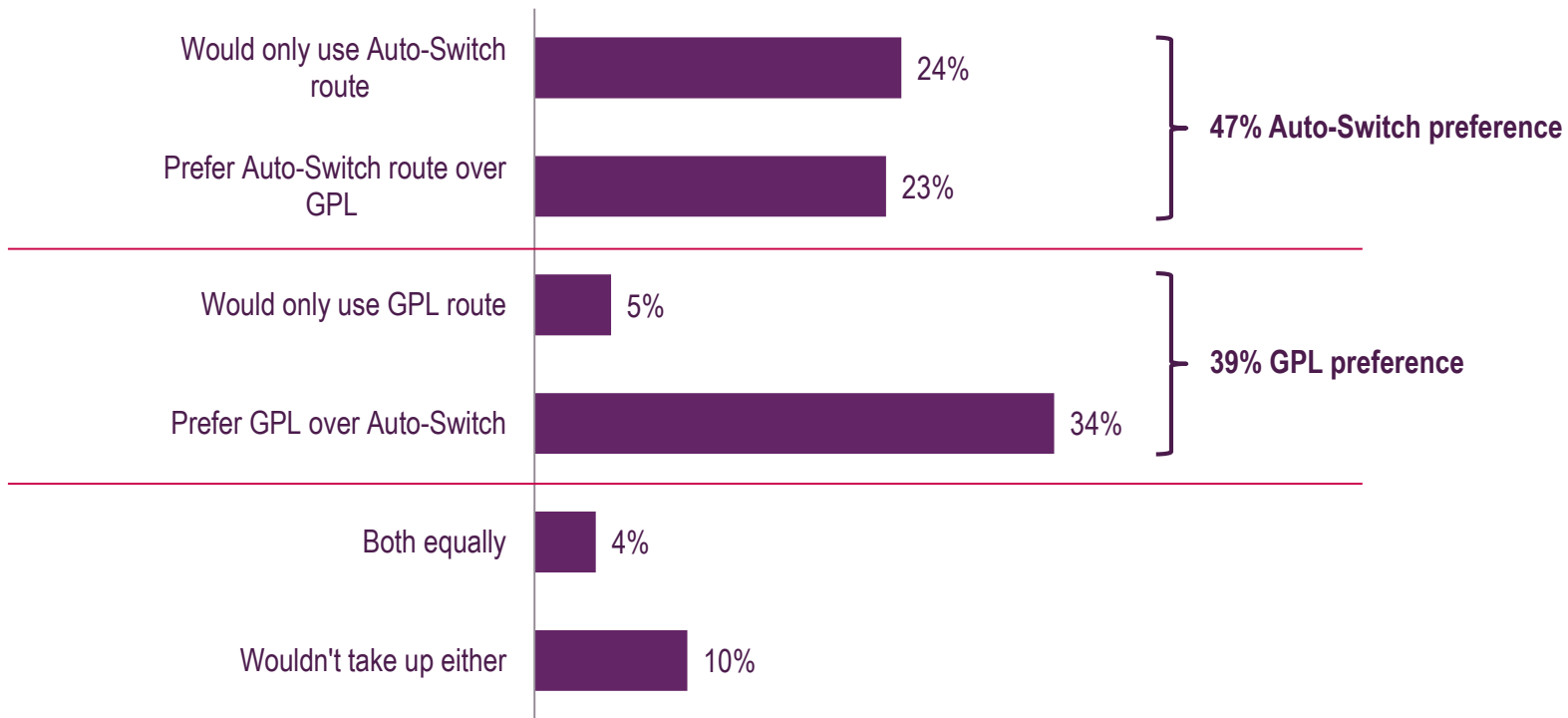
Base: All PAC switched in the last 18 months and would definitely or probably take up GPL answering question = 807

Base: All PAC switched in the last 18 months and would definitely or probably not take up GPL at all price options = 165

Attitudes towards Auto-Switch vs. GPL PAC Switchers

A higher proportion of PAC switchers said they would either only use an Auto-Switch route or would prefer it over GPL (47%), than stated a preference for GPL (39%)

Preference for Auto-Switch vs. GPL



Q. How likely would you be to request your PAC via a free text message rather than the way you requested it last time you switched? / Q. How likely would you be to request your PAC online rather than texting a free number? / Q. How likely would you be to use this method, rather than the way you switched last time you switched?
Q. Which of these would you be most likely to use?

Example reasons why PAC switchers preferred an Auto-Switch or GPL method most

Reasons for Auto-Switch SMS/Online preference

It takes away the hassle of having to ring up and request PAC code.

This seems a logical process and doesn't require any complex negotiations with a current supplier.

Easier and avoids the staff from the old provider keeping you on a call offering you stuff you don't need to make you stay despite poor service during your time as a customer.

This is the quickest and easiest and would save me time.

It allows me more control over when I use the code and which future supplier I use. I'd rather discuss things with my chosen new supplier and just need to give them the PAC code.

Seems more straightforward and I could do it in my own time not when I'm talking to a salesperson.

Reasons for GPL preference

Everything with a text message absolutely fantastic.

The new provider is much more likely to get on with it whereas the current provider might be tempted to drag his feet.

It seems the option with the least hassle for the customer. Plus you are still asked, if you want to proceed. So it means that you are still informed.

Seems the easiest way, I only have to contact one supplier and there's no break in service.

I think it is slightly more appealing than the other option but then it is probably because it is a couple of steps less that you have to do then if you have to text.

Seems like a game changer. I know loads of people who have just changed number rather than go through the hassle of PAC codes.

Q. Why do you say would be most likely to use this option?

Attitudes towards reform options

C&R Switchers

Reform option diagrams

C&R Switchers

Auto-Switch SMS/online C&R Switchers

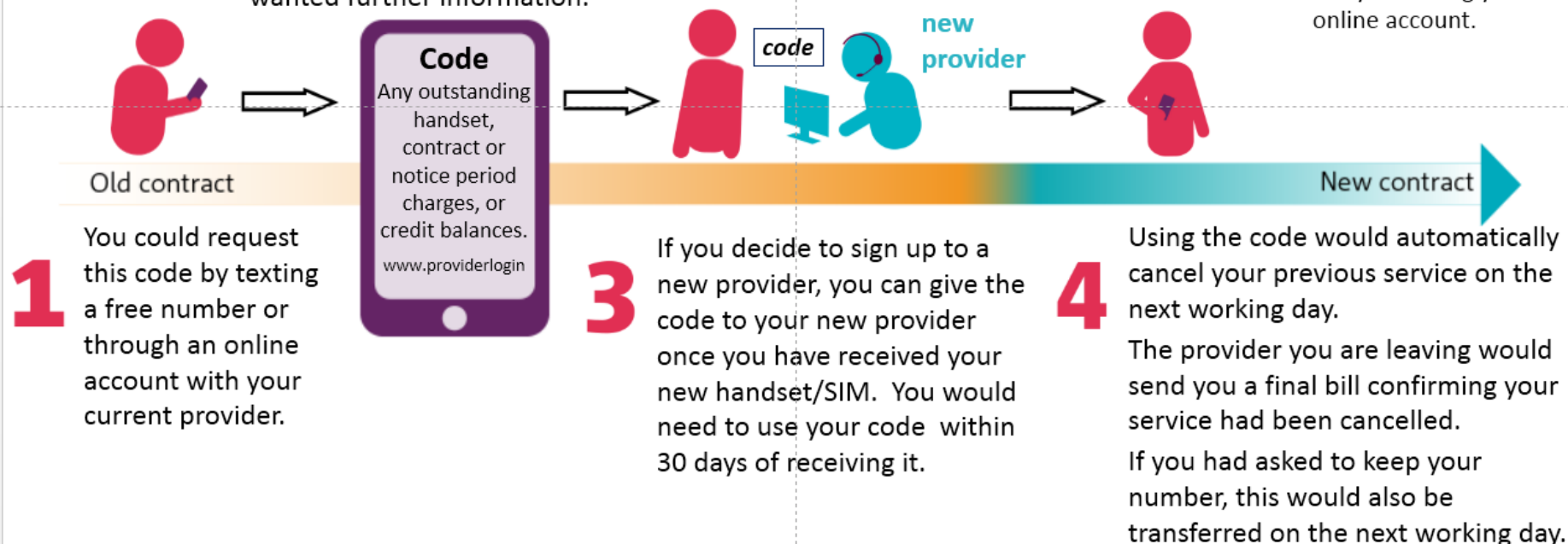
If you were to request the code by texting or using your online account, it would be texted back to you immediately.

The text would include information from your current provider about any outstanding handset, contract or notice period charges you may owe your current provider if you switched at that point.*

2 For pay as you go customers, it would include information on any credit balances you might lose.*

The text would also include a link to your online account if you have one, in case you wanted further information.

*Information about these outstanding charges or credit balances would also be available at any time, by texting a shortcode or by accessing your online account.



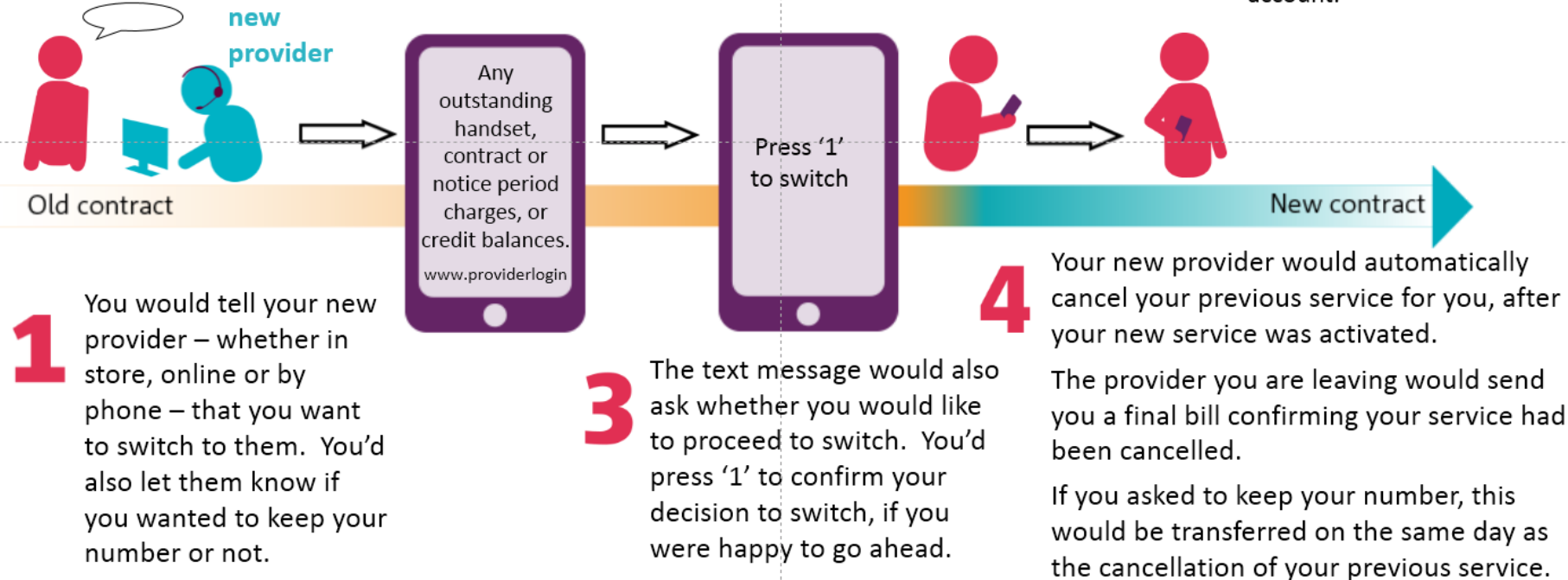
GPL C&R Switchers

Your new provider would arrange for you to receive a text during the sales conversation. This would give you information from your current provider about any outstanding handset, contract or notice period charges you may owe your current provider if you switched at that point.*

For pay as you go customers, it would include information on any credit balances you might lose.*

The text would also include a link to your online account if you have one, in case you wanted further information.

*Information about these outstanding charges or credit balances would also be available at any time, by texting a shortcode or by accessing your online account.



Attitudes towards reform options

C&R Switchers Summary

Similar to PAC switchers, C&R switchers anticipated an Auto-Switch method being more likely to be used than GPL

Interest in alternative switching methods compared to way they switched previously summary (before price options provided) – C&R Switchers

■ I definitely would ■ I probably would ■ I possibly would/ possibly wouldn't ■ I probably wouldn't ■ I definitely wouldn't



Q. If this code was available either by texting a free number or through your online account with your current provider, how likely would you be to use this code to switch, rather than the way you switched last time you switched?

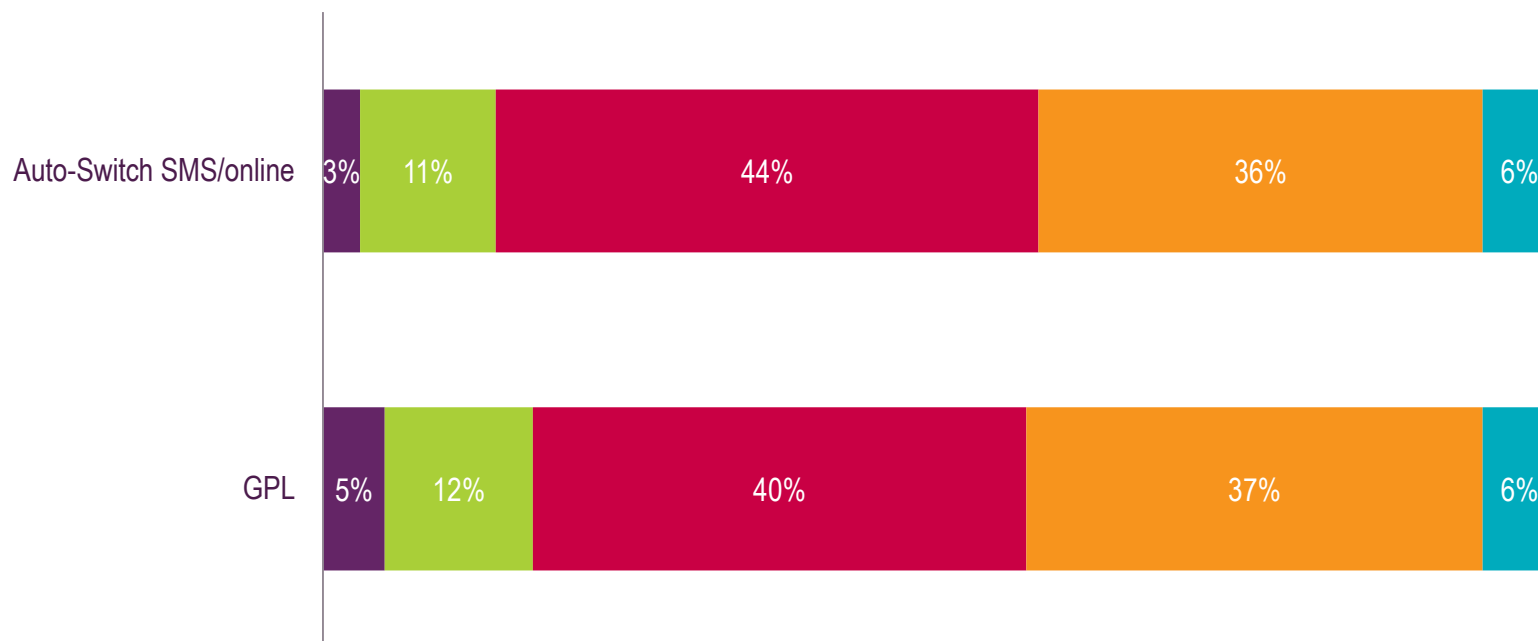
Q. How likely would you be to use this method, rather than the way you switched last time you switched?

Base: All C&R switched in the last 18 months = 758

The majority said they would keep their number if they were to switch using either reform option, similar proportions for each

Likelihood of keeping vs. changing number if were to switch via Auto-Switch SMS/online or GPL option – C&R Switchers

■ Definitely would change number ■ Probably would change number ■ Probably would keep number ■ Definitely would keep number ■ Don't know



Q. If this method was available and you used it to switch do you think you would change or keep your phone number?

Base: All C&R switched in the last 18 months and would definitely or probably take up Auto-Switch SMS/Online = 557

Base: All C&R switched in the last 18 months and would definitely or probably take up GPL = 438

Attitudes towards Auto-Switch SMS/online C&R Switchers

Three quarters stated they would use the Auto-Switch SMS/online route rather than the way they switched previously

Cease and re-provide (C&R) switchers – Auto-Switch SMS and/or online Take up

	Take-up (stated)	Take-up (down-weighted – 80/20)
	n=758	n=758
Base	All C&R switchers	All C&R switchers
Definitely would	39%	31%
Probably would	35%	7%
Net: 'would'	73%	38%
Possibly/Possibly not	18%	n/a
Probably wouldn't	6%	n/a
Definitely wouldn't	3%	n/a

Q. If this code was available either by texting a free number or through your online account with your current provider, how likely would you be to use this code to switch, rather than the way you switched last time you switched?

Example reasons why would or why wouldn't use Auto-Switch SMS/online

Why would use

I find that option very easy and fast and cheap which is good.

Because using the code would automatically cancel your previous service on the next working day.

It seems easy to do, the number is transferred quickly, service cancellation is a real advantage so that I don't have to speak to the old provider (and hear them trying to persuade me to stay!). No hassle is great.

There would be no cost, and a permanent record of the code.

Avoids the middle man and any hard sell attempts to stay with current provider.

It sounds very simple and easy and would enable me to keep my number.

Why wouldn't use

I would prefer to see what's going on and have it explain or put simply to me if I didn't understand and a free text service or online account can't do that.

I would prefer to deal with it all separately myself. Then I know it's done.

I don't see much benefit in doing this; I'd be concerned about the costs of switching this way without checking with my provider (e.g. by getting a bill with exit fees added on once I'd switched).

Because phoning up seems so much easier and quicker and there is peace of mind that it has been done correctly.

I would prefer to see what's going on and have it explain or put simply to me if I didn't understand and a free text service or online account can't do that.

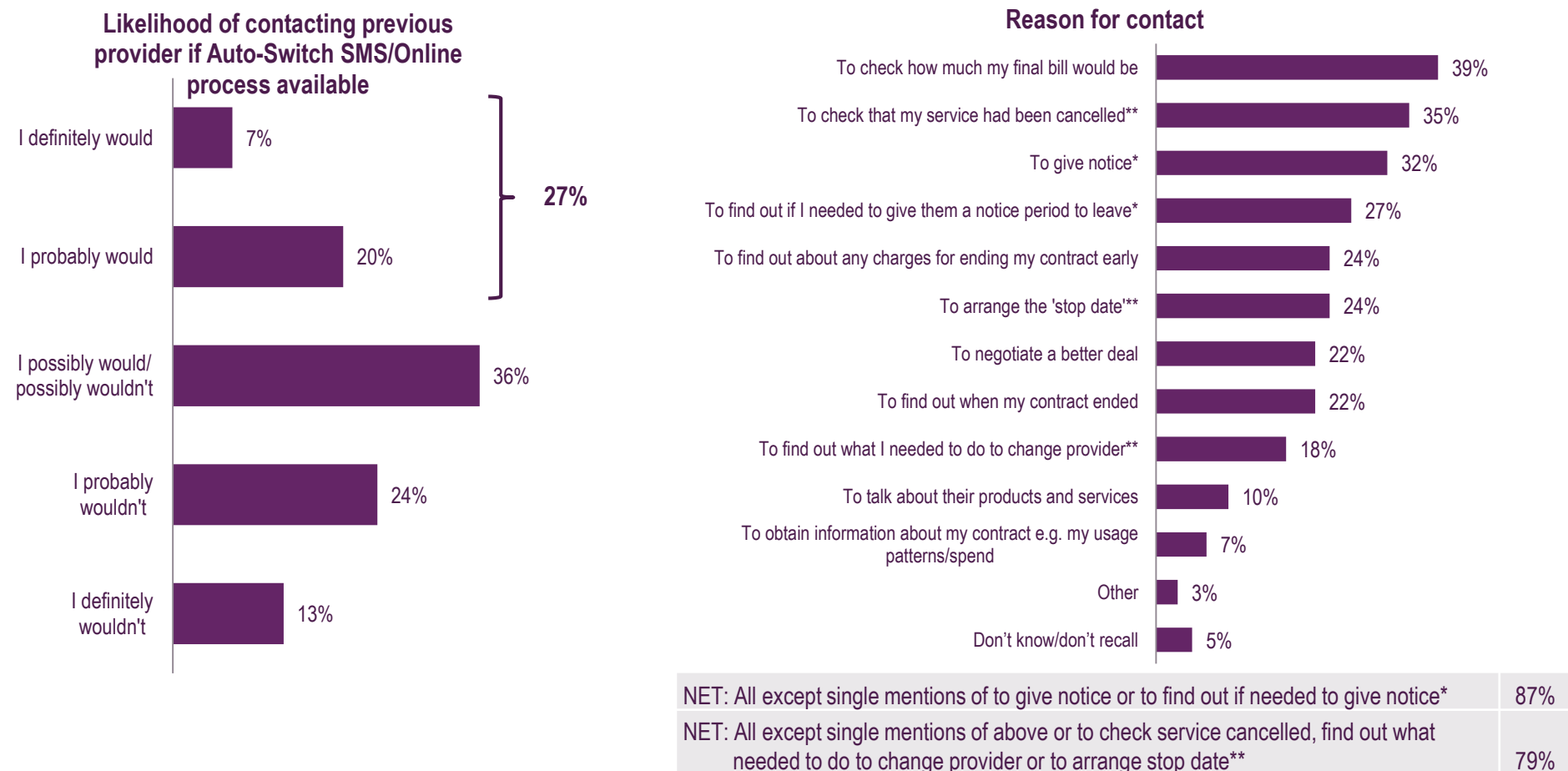
Because it sounds complicated and time consuming.

Q. Why do you say you would/might request a code via a free text message or through your online account?

Q. Why do you say you wouldn't request a code via a free text message or through your online account?

One in four said they would definitely or probably have contacted their previous provider as well if Auto-Switch SMS/online were available. This was for a variety of purposes with primary reasons to check on cancellation and on the final bill

Likelihood of contacting previous provider if had used Auto-Switch SMS/online process last time they switched and anticipated reasons for this contact



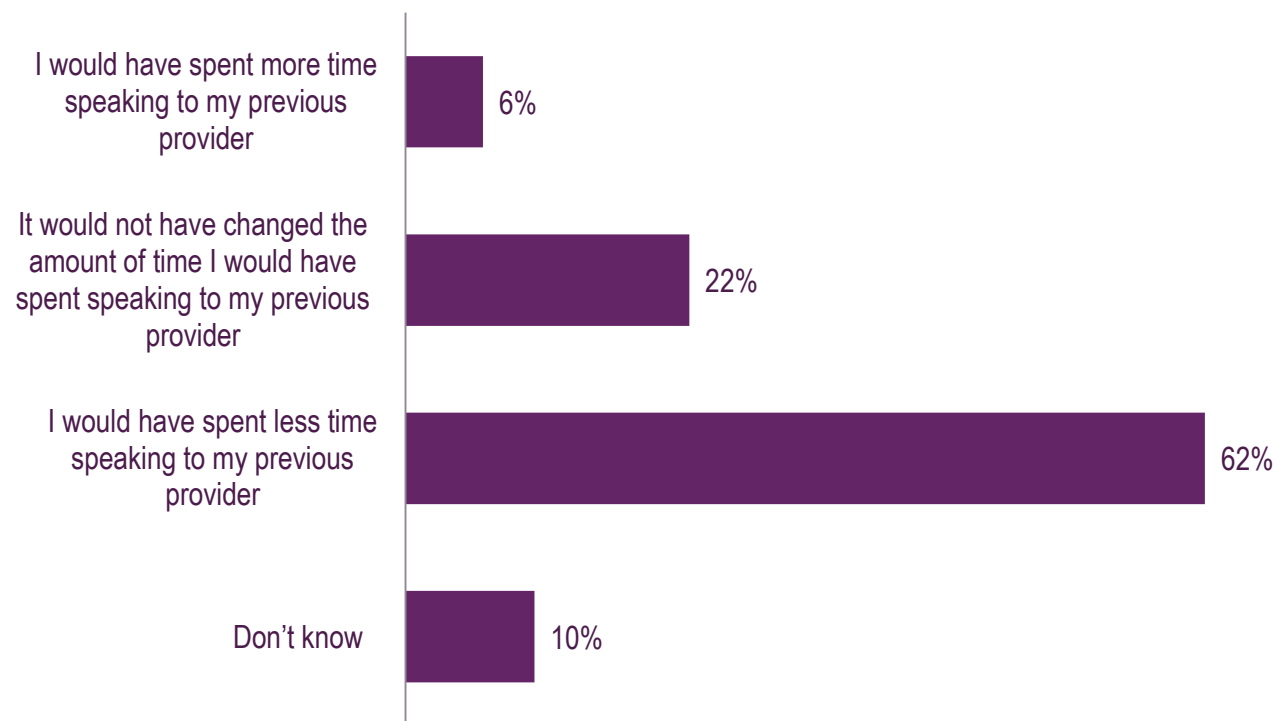
Q. If you had followed these steps last time you switched do you think you would also have contacted your previous provider, either while you were thinking about whether to switch, or to make the switch happen? / Q. Which, if any, of these would be reasons that you would still have contacted your previous provider? (prompted)

Base: All C&R switched in the last 18 months and would definitely or probably take up Auto-Switch SMS/Online = 557

Base: All C&R switched in the last 18 months, would definitely or probably take up Auto-Switch SMS/Online and would definitely or probably have still contacted previous provider = 153

Although some (27%) C&R switchers said they would still have spoken to their previous provider if they had used the Auto-Switch SMS/online route the last time they switched, nearly two in three thought they would have spent less time doing so

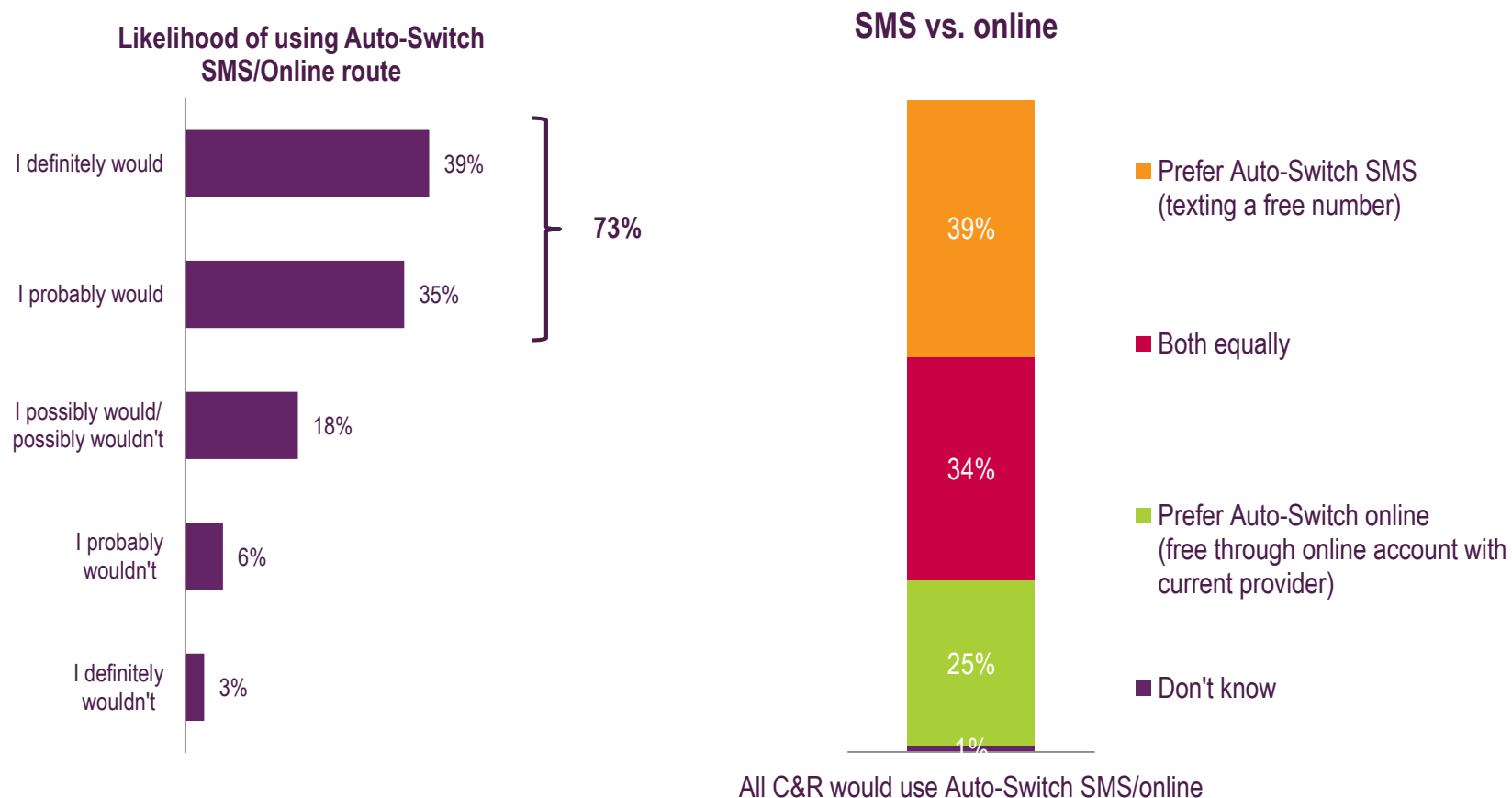
Anticipated time impact if had contacted previous provider using Auto-Switch SMS/online process last time they switched



Q. How, if at all, do you think this new method of switching would have affected the total amount of time you would have spent speaking to your previous provider, either while you were thinking about whether to switch, or to make the switch happen?

Two in five of those who said they would use an Auto-Switch SMS/online option, said they would prefer an SMS route over an online one, a quarter preferred online and one third had no preference

Preference for using Auto-Switch SMS route vs. Auto-Switch online route



Q. Would you prefer to request a code by texting a free number or through your online account with your current provider?

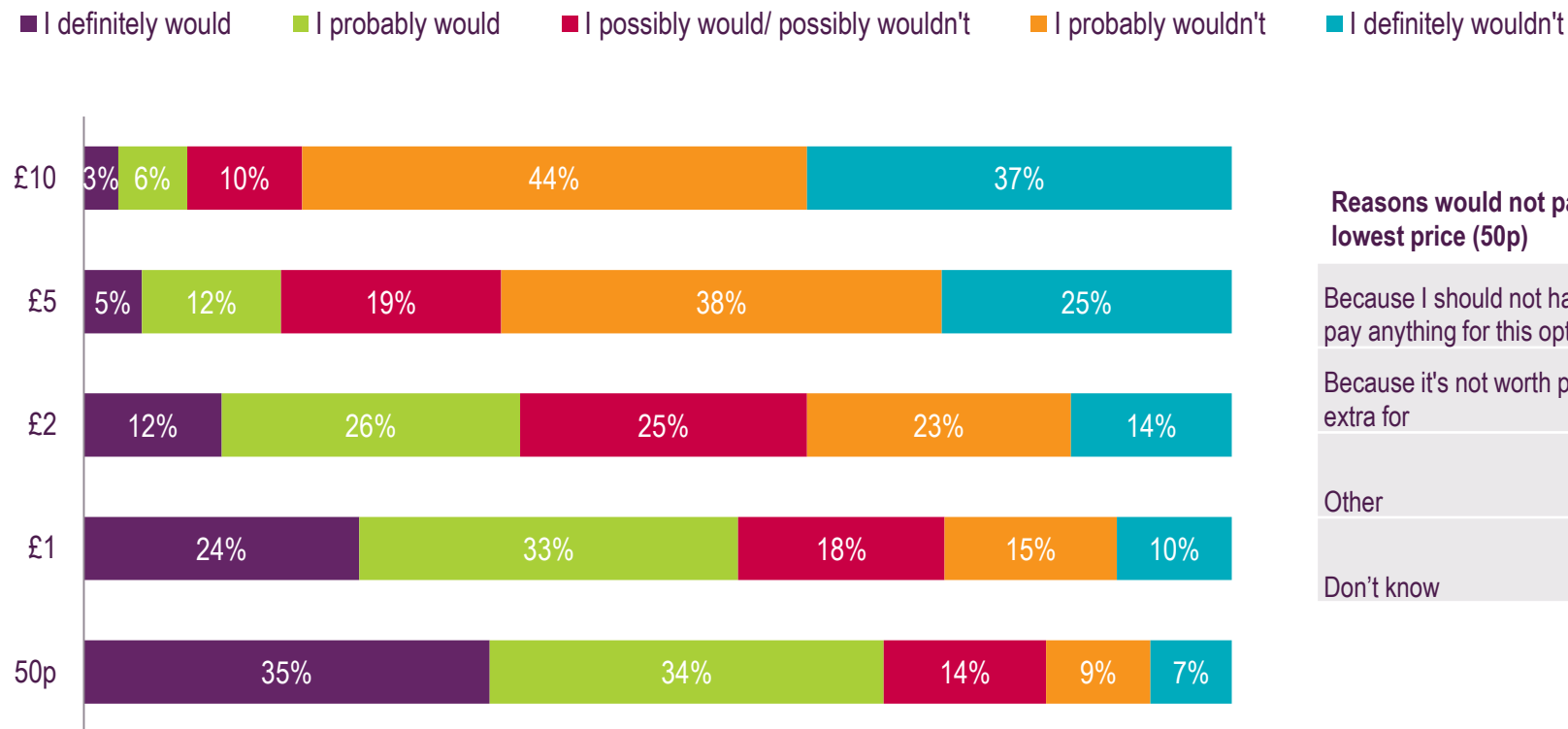
Base: All C&R switched in the last 18 months = 758

Base: All C&R switched in the last 18 months and would definitely or probably take up Auto-Switch SMS/Online = 557

Among those that said they would use an Auto-Switch SMS/online route, one in three said they would definitely be willing to pay for it at a 50p level, one in four at the £1 level

Willingness to pay (WTP): Auto-Switch SMS/online – C&R Switchers

Stated willingness to pay



Reasons would not pay at lowest price (50p)

Because I should not have to pay anything for this option	67%
Because it's not worth paying extra for	36%
Other	8%
Don't know	3%

Q. You said you would switch by requesting this code via a free text message if this method were available? If, instead of being free, there had been a charge to use this method of xx how likely would you be to use this method, rather than the way you requested your PAC last time you switched?

Q. You said you would not take up this option if there was a 50p charge. Why do you say this?

Base: All C&R switched in the last 18 months and would definitely or probably take up Auto-Switch SMS/Online answering question = 539

Base: All C&R switched in the last 18 months and would definitely or probably not take up Auto-Switch SMS/Online at all price options = 91*

*Caution: small base
treat as indicative only

Attitudes towards GPL C&R Switchers

Nearly three in five stated they would use the GPL route rather than the way they switched previously

Cease and re-provide (C&R) – GPL

Take up

	Take-up (stated)	Take-up (down-weighted – 80/20)
	n=758	n=758
Base	All C&R switchers	All C&R switchers
Definitely would	21%	17%
Probably would	37%	7%
Net: 'would'	58%	24%
Possibly/Possibly not	30%	n/a
Probably wouldn't	9%	n/a
Definitely wouldn't	3%	n/a

Q. How likely would you be to use this method, rather than the way you switched last time you switched?

Example reasons why would or why wouldn't use GPL

Why would use

Better than what I had to do.

It's easy, convenient and can be done instantly with my new provider.

It would be more believable were it from my new provider...I wouldn't get stuck with the biased view of my previous provider trying to keep me as a customer.

Sounds easy and straightforward, makes changing easy.

I can stand in the shop whilst the assistant does it all for me. It is much more straightforward than the previous convoluted method.

I'd feel a little more reassured if there was someone on the phone talking me through it. It doesn't seem to demand too much from me!

Why wouldn't use

It just seems pointless. Going into a store to talk to someone whilst they send a text? Is it really that difficult to just phone and cancel? No, no more difficult or easy so why bother with a new system that saves no time and achieves the thing?

It is not very appealing and you might get a surprise final bill from your previous provider if you cancelled your contract with them. I am not too sure.

I don't think that would be the easiest and quickest choice.

It's quite different from the normal method and is also quite arduous and tiring.

There's no guarantee your old contract would get cancelled.

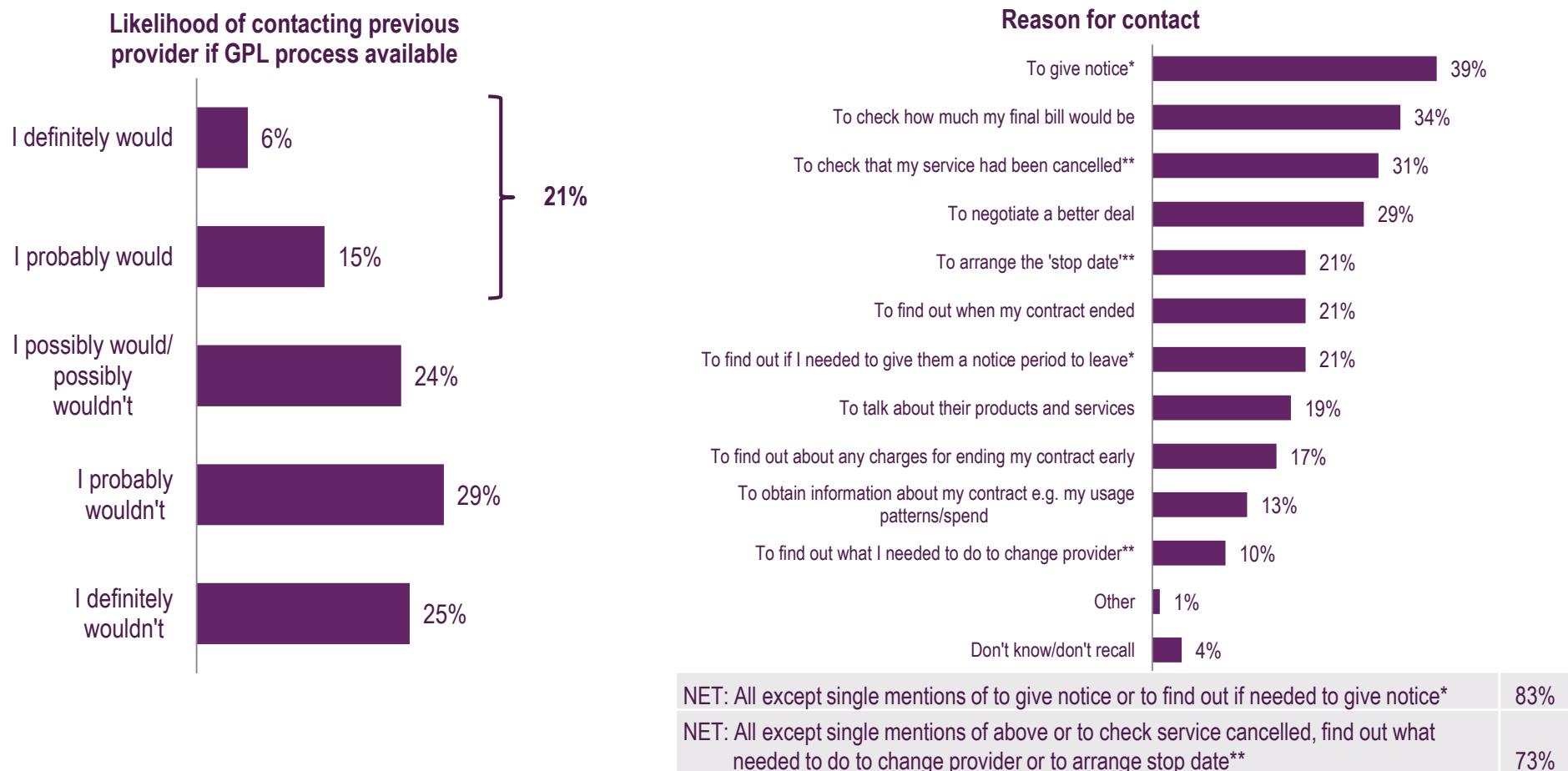
Q. Why do you say you would/might use this method?

Q. Why do you say you wouldn't use this method?

Base: All C&R switched in the last 18 months

One in five said they would definitely or probably have contacted their previous provider as well if GPL were available, lower than for Auto-Switch SMS/online method. This was for a variety of purposes - primary reasons to check on the final bill and that the service had been cancelled

Likelihood of contacting previous provider if had used GPL process last time they switched and anticipated reasons for this contact



Q. If you had followed these steps last time you switched do you think you would also have contacted your previous provider, either while you were thinking about whether to switch, or to make the switch happen? / Q. Which, if any, of these would be reasons that you would still have contacted your previous provider? (prompted)

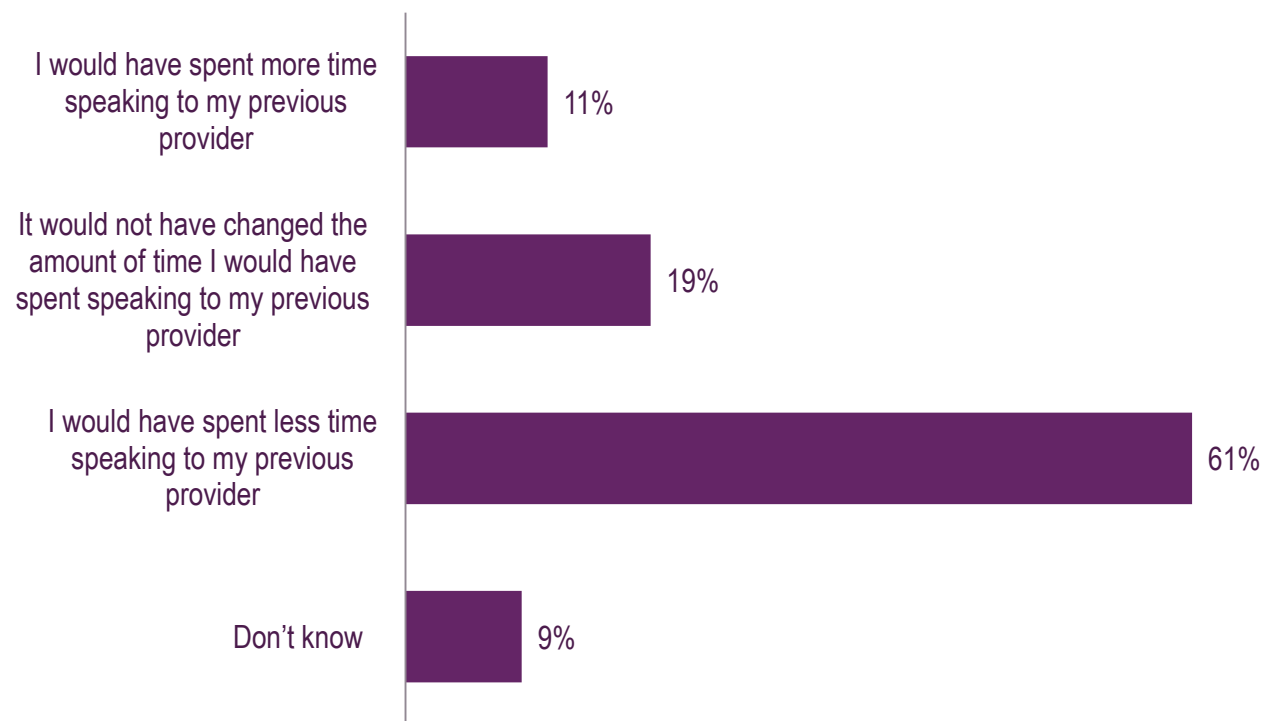
*Caution: small base treat as indicative only

Base: All C&R switched in the last 18 months and would definitely or probably take up GPL = 438

Base: All C&R switched in the last 18 months, would definitely or probably take up GPL and would definitely or probably have still contacted previous provider = 94*

Although some (21%) C&R switchers said they would still have spoken to their previous provider if they had used the GPL route the last time they switched, three in five thought they would have spent less time talking to them

Anticipated time impact if had contacted previous provider using GPL process last time they switched

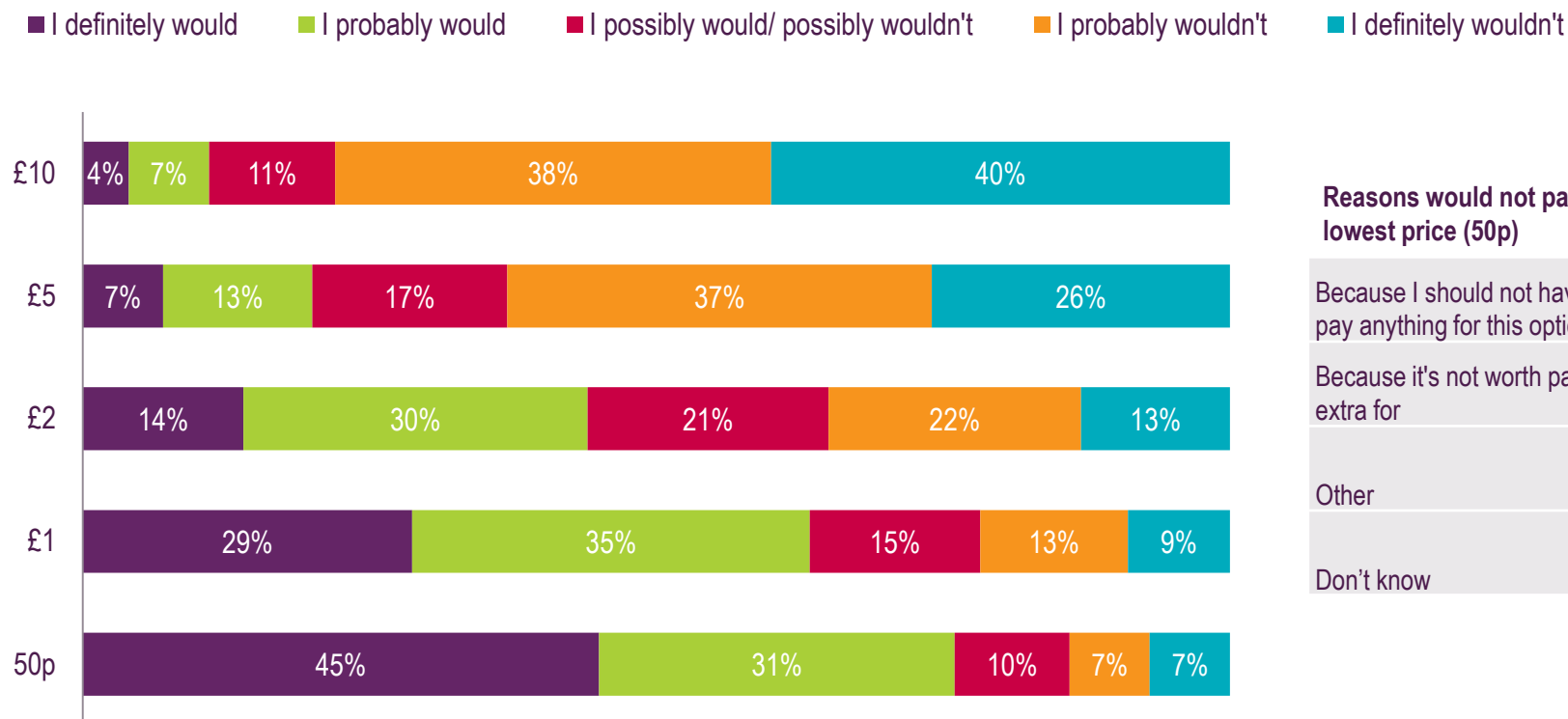


Q. How, if at all, do you think this new method of switching would have affected the total amount of time you would have spent speaking to your previous provider, either while you were thinking about whether to switch, or to make the switch happen?

Among those that said they would use a GPL route, nearly half (45%) said they would definitely be willing to pay for it at a 50p level, one in four at the £1 level

Willingness to pay (WTP): GPL – C&R Switchers

Stated willingness to pay



Reasons would not pay at lowest price (50p)

Because I should not have to pay anything for this option	61%
Because it's not worth paying extra for	49%
Other	5%
Don't know	3%

Q. You said you would use this method of switching if it was available. If, instead of being free, there had been a charge to use this method of xx how likely would you be to use this method, rather than the way you switched last time you switched?

Q. You said you would not take up this option if there was a 50p charge. Why do you say this?

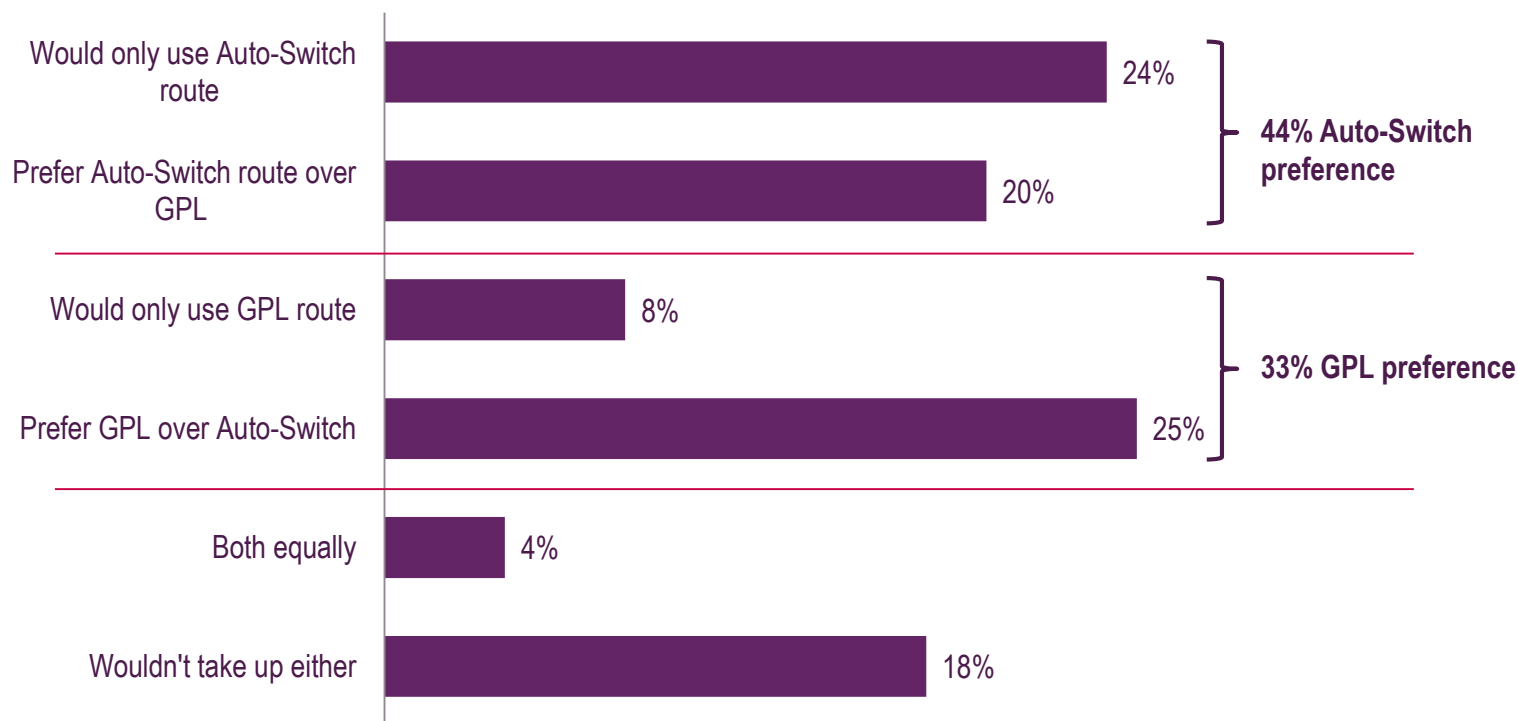
Base: All C&R switched in the last 18 months and would definitely or probably take up GPL answering question = 430

Base: All C&R switched in the last 18 months and would definitely or probably not take up GPL at all price options = 61* *Caution: small base, treat as indicative only

Attitudes towards Auto-Switch vs. GPL C&R switchers

A higher proportion of C&R switchers would either only use an Auto-Switch route or said they would prefer it over GPL

Preference for Auto-Switch vs. GPL



Q. If this code was available either by texting a free number or through your online account with your current provider, how likely would you be to use this code to switch, rather than the way you switched last time you switched? / Q. How likely would you be to use this method, rather than the way you switched last time you switched?
Q. Which of these would you be most likely to use?

Example reasons why C&R switchers preferred an Auto-Switch or GPL method most

Reasons for Auto-Switch SMS/Online preference

I would want to do it the easiest way, which would be by either texting or online.

I prefer the fact that I select the code and make the decision on when I use it.

It requires less communication with other people and seems like the quicker and easier method of the two.

Easiest way, no calling, being on hold or talking to a human that doesn't always know what they are advising or has to look it up. A text or computer gathers information and sends it to you quickly, more efficient.

I'm more used to using such things as code and would find this method more simple and convenient.

I prefer to deal directly either by text, online with my provider just to be sure I do not owe them any more money as I would rather deal with them or hear directly from them than a new provider whom I have no previous business relationship with.

Reasons for GPL preference

Because the sales agent would be present to confirm all OK.

It seems like a less complicated way to change providers, and people may get it messed up when they need to type in the code.

It is vastly simpler. If the sales assistant wants my custom then I can reasonably expect them to do this quick and simple process for me. I can't see it taking more than a minute or two.

Old providers always try to retain custom and I'm not comfortable with that.

Because it requires no pre-planning and can be done on the spur of the moment while in store.

It's probably more convenient to do it while arranging the new contract.

Q. Why do you say would be most likely to use this option?

Annex 1

**Take-up and willingness to pay (WTP)
among respondents who used telephone,
in-store or web-chat contact methods**

Summary of take-up for each scenario by previous process used

Stated take up among switchers who used telephone/in-store/web-chat methods

	Auto-Switch SMS	Auto-Switch SMS/online		GPL	
	n=1019	n=1019	n=385	n=1019	n=385
	PAC switchers	PAC switchers	C&R switchers	PAC switchers	C&R switchers
Definitely would	45%	46%	45%	29%	23%
Probably would	36%	37%	32%	39%	39%
Possibly/Possibly not	12%	14%	15%	20%	26%
Probably wouldn't	5%	2%	6%	7%	9%
Definitely wouldn't	2%	2%	2%	4%	2%
Net: 'would'	81%	82%	77%	68%	63%

Base: As shown on table

PAC switchers who requested PAC by telephone, in-store or web-chat/C&R switchers who cancelled by telephone, in-store or web-chat

Summary of take-up for each scenario by previous process used

Adjusted take up (down-weighted by 80/20*) among switchers who used telephone/in-store/web-chat methods

	Auto-Switch SMS	Auto-Switch SMS/online		GPL	
	n=1019	n=1019	n=385	n=1019	n=385
Down weight applied to each (%)	PAC switchers	PAC switchers	C&R switchers	PAC switchers	C&R switchers
Definitely would (80%)	36%	37%	36%	23%	18%
Probably would (20%)	7%	7%	6%	8%	8%
Net: 'would'	43%	44%	43%	31%	26%

Base: As shown on table

PAC switchers who requested PAC by telephone, in-store or web-chat/C&R switchers who cancelled by telephone, in-store or web-chat

*Stated take-up down-weighted to 80% for those stating 'definitely take-up' and 20% for those stating 'probably take-up'

Average willingness to pay (WTP) for each scenario by process used

Stated willingness to pay (WTP) among switchers who used telephone/in-store/web-chat methods

	Average definitely WTP* (definitely WTP if definitely/probably take up: as stated)	Average probably WTP** (definitely/ probably WTP if definitely/ probably take-up: as stated)
All C&R switchers (n=385)		
GPL	£0.61	£1.51
Auto-Switch SMS/online	£0.66	£1.70
All PAC switchers (n=1019)		
GPL	£0.72	£1.61
Auto-Switch SMS	£0.62	£1.52
Auto-Switch SMS/online***	£0.65	£1.60

Base: As shown on table

PAC switchers who requested PAC by telephone, in-store or web-chat/C&R switchers who cancelled by telephone, in-store or web-chat

*Average of the maximum values respondents were definitely willing to pay

**Average of the maximum values respondents were probably or definitely willing to pay

***All PAC asked WTP question i.e. excludes those who stated top two boxes for online but were asked WTP for SMS: 981

Average willingness to pay (WTP) for each scenario by process used

Adjusted willingness to pay (down-weighted by take-up) among switchers who used telephone/in-store/web-chat methods

	Average definitely WTP* (definitely WTP only if definitely take-up: down-weighted by take-up: 80/0)	Average definitely WTP* (definitely WTP if definitely/probably take up: down-weighted by take-up: 80/20)	Average probably WTP** (definitely/probably WTP only if definitely take-up: down-weighted by take-up: 80/0)	Average probably WTP** (definitely/probably WTP if definitely/probably take-up: down-weighted by take-up: 80/20)
All C&R switchers (n=385)				
GPL	£0.32	£0.36	£0.62	£0.77
Auto-Switch SMS/online	£0.44	£0.46	£0.92	£1.03
All PAC switchers (n=1019)				
GPL	£0.47	£0.50	£0.73	£0.87
Auto-Switch SMS	£0.39	£0.42	£0.68	£0.81
Auto-Switch SMS/online***	£0.41	£0.44	£0.71	£0.85

Base: As shown on table

PAC switchers who requested PAC by telephone, in-store or web-chat/C&R switchers who cancelled by telephone, in-store or web-chat

*Average of the maximum values respondents were definitely willing to pay

**Average of the maximum values respondents were probably or definitely willing to pay

***All PAC asked i.e. excludes those who stated top two boxes for online but were asked WTP for SMS: 981

Annex 2

Approach to willingness to pay (WTP) for the Statement published in December 2017

Average willingness to pay (WTP) for Auto-Switch SMS and Auto-Switch SMS/online by process used

Stated and adjusted average willingness to pay (down-weighted on WTP response)

		Average stated WTP*		Average adjusted WTP****		
		Definitely pay**	Probably pay***	Low case (80:0 weight)	Base case (80:20 weight)	High case (80:40 weight)
All C&R switchers (n=758)	Auto-Switch SMS/online	£0.52	£1.41	£0.42	£0.59	£0.77
All PAC switchers (n=1251)	Auto-Switch SMS	£0.59	£1.51	£0.47	£0.65	£0.84
All PAC switchers (n=1251)	Auto-Switch SMS/online	£0.59	£1.52	£0.47	£0.66	£0.84

Base: As shown on table

*Respondents who stated "possibly/possibly not", "probably not" or "definitely not" to the take-up for free question are assumed to have zero willingness to pay

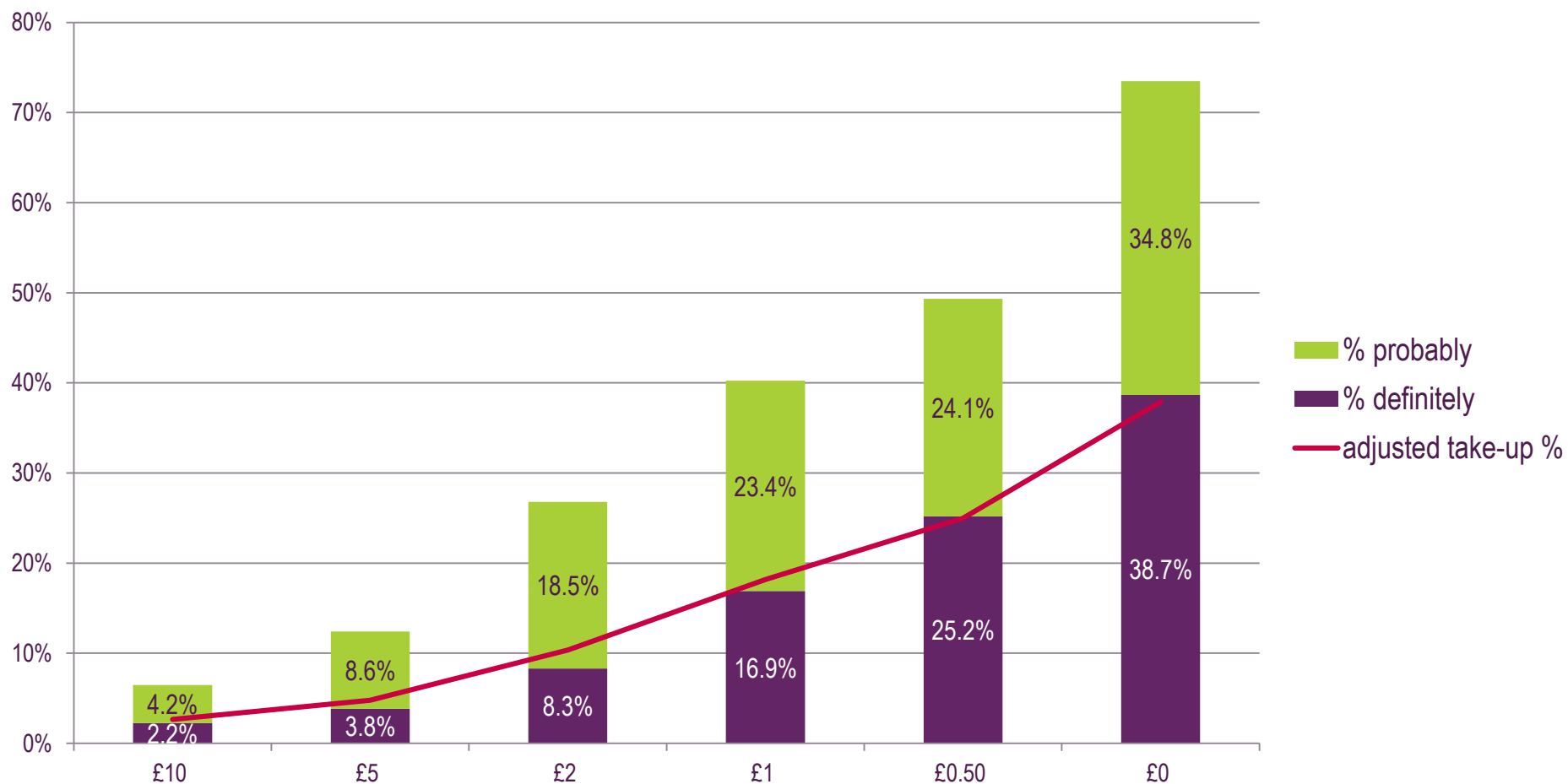
**Average of the maximum values respondents were definitely willing to pay

*** Average of the maximum values respondents were probably or definitely willing to pay

****Adjusted based on x% of amount definitely willing to pay + y% of additional amount probably willing to pay

Willingness to pay (WTP): Auto-Switch SMS/online – C&R Switchers

Stated and adjusted take-up at given price points

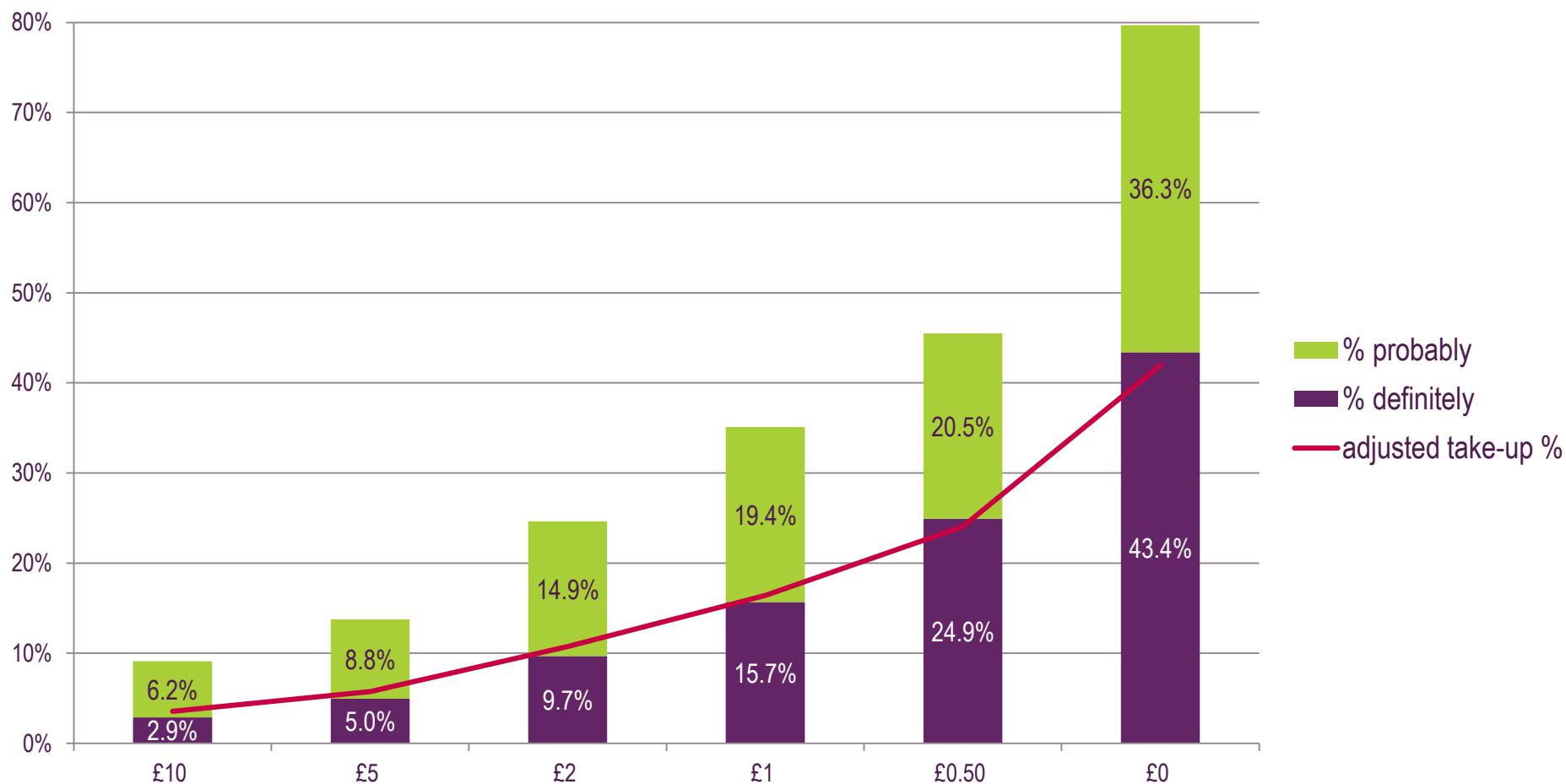


Q. If this code was available either by texting a free number or through your online account with your current provider, how likely would you be to use this code to switch, rather than the way you switched last time you switched? / Q. How likely would you be to use this method, rather than the way you switched last time you switched?

Base: All C&R switched in the last 18 months = 758

Willingness to pay (WTP): Auto-Switch SMS/online – PAC Switchers

Stated and adjusted take-up at given price points



Q. How likely would you be to request your PAC via a free text message rather than the way you requested it last time you switched? / Q. How likely would you be to request your PAC online rather than texting a free number/rather than the way you requested your PAC last time? / Q. You said you would request your PAC via a free text message / your online account if this method were available. If, instead of being free, there had been a charge to use this method of xx how likely would you be to use this method, rather than the way you requested your PAC last time you switched?

Base: All PAC switched in the last 18 months = 1251