Automatic compensation: Consumer experience of provisioning delays, loss of service and missed appointments

Presentation of Quantitative Findings
# CONTENTS

## Background, objectives & approach

Slide #

**Fixed Line research**

**Consumers**
- Executive summary: 8
- Demographics, services used: 12
- Reliance on services, switching behaviour: 16
- Experience of and impact of loss of service/delayed provisioning: 20
- Experience of and impact of loss of service: 28
- Compensation for loss of service: 47
- Experience of missed appointments and compensation: 51

**SMEs**
- Executive summary: 61
- Firmographics, services used: 64
- Reliance on services, switching behaviour: 72
- Experience of and impact of loss of service/delayed provisioning: 78
- Experience of and impact of loss of service: 87
- Compensation for loss of service: 106
- Experience of missed appointments and compensation: 112

**Mobile Research**

**Consumers**
- Minimum standards & willingness to pay more/less for better/worse service: 130

**SMEs**
- Minimum standards & willingness to pay more/less for better/worse service: 147

**Minimum standards & willingness to pay more/less for better/worse service**

Slide #

2
Background, objectives & approach
Background

Two of Ofcom’s current projects relate to service quality across the supply chains for fixed and mobile communications.

The **Automatic Compensation project** focuses on retail communications providers for both fixed and mobile communications. The project is considering whether to require retail CPs to pay residential consumers and SMEs automatic compensation when service quality problems occur that affect fixed or mobile services. If so, the project will consider at what value compensation should be set. Research with Consumers and SMEs was needed to feed into both of these projects, the objectives of which are detailed overleaf.

The **Quality of Fixed Networks (QoFN)** project focuses on quality of service within the fixed voice and broadband wholesale market. This project is exploring issues such as whether the standards set by Ofcom meet consumers and businesses’ needs and expectations, how to regulate the service quality that Openreach delivers to retail communications providers and how Ofcom may require Openreach to provide better service where this will deliver better value to end users.

Research with Consumers and SMEs was needed to feed into both of these projects, the objectives of which are detailed overleaf.

*NB: Ofcom already sets regulated minimum standards for Openreach for the timely completion of repairs and installations*
Consumer & SME expectations of standards of service quality for fixed & mobile services

- Expectations of service reliability and understand what constitutes ‘reliable’
- Experiences and expectations around service faults/ouages
  - Frequency of service faults and the nature of these
  - Experiences of getting a repair? What are expectations/priorities?
- Experiences and expectations around new service installations

Impact/harm/detriment caused by Quality of Service issues for fixed & mobile services

- QoS problems experienced and the frequency of these
- Length of time to resolve and satisfaction with this
- Detriment experienced
- Action taken to mitigate the problem and associated costs
- Experiences, expectations and satisfaction around compensation
- Possible mitigating actions that could be taken by the retail CP
- Willingness to pay to avoid QoS problems in the future

Willingness to pay for incrementally better service for fixed & mobile services

- How do users balance price and service quality?
- Willingness to pay for incrementally better service above baseline expectations?
- Willingness to accept lower levels of service in return for a lower price?
Approach

Consumers - In home CAPI interviews
We spoke to a nationally and regionally representative sample of 2,088 adults across the UK. Random location interviewing was used to ensure a good geographical spread. Controls were applied by region and sub-region, then quotas were set on age, gender, working status and tenure. Note: The mobile phone questions were taken from a similar earlier study*

SMEs - CATI interviews
We spoke to 1,006 telecoms decision makers across the UK. An interlocking quota sample based on country/region and size was implemented. In addition to controlling the sample this way, non-interlocking quotas were set on industry sector to ensure broad alignment with UK business profiles. Note: The mobile phone questions were merged with those from an earlier study in order to boost the total number of mobile phone ‘loss of service’ interviews*.

Screening: All respondents were responsible for telecoms approach, policy and purchasing - covering the day to day processes, as well as the decision making

Weighting: In both cases, our final data has been weighted in order to align it to the sample profile of each universe

Timing: Interviews were undertaken between 16th December, 2016 and 27th January, 2017. *The earlier interviews took place between 25th August and 28th September, 2016
Automatic compensation:
Consumer experience of provisioning delays, loss of service and missed appointments

Fixed Line Research:
Consumers
Fixed line research: Consumer executive summary (1)

- Overall, consumers have a **greater reliance on broadband and mobile** than Landline
  - 2 in 3 say their HH would struggle to function without these vs 1 in 4 for landline

- **Price is the dominant factor in the choice of provider.**
  - Broadband speed (35%) and reliability (30%) are also key for internet
  - Bundling is important to 1 in 3, in relation to both landline (33%) and internet (29%)

- Two fifths (41%) have switched any fixed line service in the past 5 years
  - 27% have switched both, 11% broadband (only) and 4% landline (only)

- A quarter (24%) have experienced a **complete loss (for more than one hour, within the last 2 years) of their fixed line service**, whilst 1 in 20 (5%) have experienced a LoS during provisioning or upgrading
  - On average, the complete LoS lasted 3.5 days and the provisioning/upgrading LoS 1.9 days

- Three quarters (77%) reported their LoS to their provider
  - Overall, they waited 12 hours before doing so and their service was restored after 4.3 days

- Just over half (54%) are satisfied with their providers ability to resolve the LoS
  - They become increasingly **dissatisfied after waiting 3 days** for their restoration
  <1day = 76% satisfied, 1-3 days = 65% satisfied, 4+ days = 13% satisfied
Fixed line research: Consumer executive summary (2)

- Three fifths (58%) feel their LoS had a negative impact on their HH generally

- Only 7% received compensation for their LoS, with 3% asking for it. Of those that did not receive compensation, 7% asked for it and 88% did not (5% didn’t know)

- After probing, 30% of consumers expect to be compensated for the impact of their LoS. On average, they expect £35 - to be paid as a credit on their account or cash

- 1 in 10 (8%) changed supplier as a direct result of their LoS. Similar proportions are actively looking to change (7%), wanted to change, but stayed as they were within their minimum contact period (7%) or stayed for other reasons (6%)
1 in 4 (27%) of those experiencing a LoS waited in for an engineer visit, with 1 in 10 taking time off.

On average, 1½ days is considered reasonable notice for an amendment to an engineer appointment.

4% have ever experienced a missed appointment, with 3% doing so in the last 2 years.
- On average, they spend 2 hours waiting for an engineer.
- On average, they spend 3 hours trying to set up another appointment.
  - 3 in 4 contact their provider. All used the phone. On average, they contacted their provider 3 times.

Only 8% received compensation for their missed appointment, with 4% asking for it. Of those that did not receive compensation, 15% asked for it and 79% did not (4% didn’t know).

After probing, 41% of consumers expect to be compensated. On average, they expect c£50 - to be paid as a credit on their account or cash.
Section 1
Demographics, Services used
Key sample criteria: Gender, age, working status, SEG, HH composition

Demographics

### Gender
- Male: 48%
- Female: 52%

### Age
- 16-24: 9%
- 25-44: 32%
- 45-64: 34%
- 65+: 25%

### Working status
- Full time education: 4%
- Working full time: 38%
- Working part time: 13%
- Looking after home/family: 8%
- Retired from paid work: 28%
- Unemployed: 6%
- Work/training scheme: 0%
- Permanently sick/disabled: 3%
- Don’t know/ref: 0%

### # of adults in household
- One: 22%
- Two: 56%
- Three: 15%
- Four or more: 8%

### # of children in household
- One: 14%
- Two: 13%
- Three: 4%
- Four or more: 2%
- None: 66%
### Key sample criteria: Country/region, urbanity and HH ownership

**Location**

<table>
<thead>
<tr>
<th>Region</th>
<th>%</th>
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<tbody>
<tr>
<td>England</td>
<td>75%</td>
</tr>
<tr>
<td>South East</td>
<td>15%</td>
</tr>
<tr>
<td>London</td>
<td>12%</td>
</tr>
<tr>
<td>South West</td>
<td>10%</td>
</tr>
<tr>
<td>West Midlands</td>
<td>9%</td>
</tr>
<tr>
<td>East of England</td>
<td>9%</td>
</tr>
<tr>
<td>East Midlands</td>
<td>7%</td>
</tr>
<tr>
<td>North West</td>
<td>9%</td>
</tr>
<tr>
<td>Yorkshire and the Humber</td>
<td>7%</td>
</tr>
<tr>
<td>North East</td>
<td>6%</td>
</tr>
<tr>
<td>Scotland</td>
<td>8%</td>
</tr>
<tr>
<td>Wales</td>
<td>5%</td>
</tr>
<tr>
<td>Northern Ireland</td>
<td>2%</td>
</tr>
</tbody>
</table>

**Urbanity**

<table>
<thead>
<tr>
<th>Urbanity</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Urban</td>
<td>86%</td>
</tr>
<tr>
<td>Medium town</td>
<td>35%</td>
</tr>
<tr>
<td>Smaller city/large town</td>
<td>20%</td>
</tr>
<tr>
<td>Large city</td>
<td>16%</td>
</tr>
<tr>
<td>Small town</td>
<td>15%</td>
</tr>
<tr>
<td>Rural</td>
<td>14%</td>
</tr>
<tr>
<td>Remote rural</td>
<td>2%</td>
</tr>
</tbody>
</table>

**Home ownership status**

<table>
<thead>
<tr>
<th>Ownership Type</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Owned outright</td>
<td>34%</td>
</tr>
<tr>
<td>Being bought on mortgage</td>
<td>28%</td>
</tr>
<tr>
<td>Rented from LA/HA</td>
<td>22%</td>
</tr>
<tr>
<td>Rented from private landlord</td>
<td>15%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
</tr>
<tr>
<td>Don't know</td>
<td>0%</td>
</tr>
</tbody>
</table>
Almost 9 in 10 have fixed broadband. Three quarters have smartphones (correlated with younger age) or use telephone landlines for making/receiving calls (correlated with older age).

**Communication services currently used**

<table>
<thead>
<tr>
<th>Service</th>
<th>Consumer</th>
<th>Base: Total Sample Consumer n=2088</th>
</tr>
</thead>
<tbody>
<tr>
<td>Telephone landline (used only for broadband connection)</td>
<td>20%</td>
<td>199 682 702 505 1053 1035 1904 184</td>
</tr>
<tr>
<td>Telephone landline (not mobile) - used for making and/or receiving calls</td>
<td>74%</td>
<td>27% 29% 18% 7% 18% 21% 21% 10%</td>
</tr>
<tr>
<td>Fixed broadband internet connection</td>
<td>87%</td>
<td>91% 95% 94% 66% 93% 81% 87% 86%</td>
</tr>
<tr>
<td>Smartphone</td>
<td>74%</td>
<td>97% 92% 80% 35% 81% 67% 75% 68%</td>
</tr>
<tr>
<td>Standard mobile phone</td>
<td>22%</td>
<td>6% 8% 21% 48% 19% 25% 21% 28%</td>
</tr>
</tbody>
</table>
Section 2
Reliance on Services, Switching behaviour
Greater reliance on Internet and Mobile than Landline. Two-thirds say household would “struggle to function” without these. Households feel they could cope just under a week without Internet (much longer for landline).

**Importance of telecoms services currently used**

- **Landline telephone**
  - My household would not find day to day activity impeded without this service: 22%
  - My household would rather the service was available but could manage without it: 29%
  - My household could manage but only for a limited period without it: 22%
  - My household would struggle to function without it: 27%

- **Fixed Internet connection**
  - My household would not find day to day activity impeded without this service: 3%
  - My household would rather the service was available but could manage without it: 8%
  - My household could manage but only for a limited period without it: 23%
  - My household would struggle to function without it: 66%

- **Mobile phone**
  - My household would not find day to day activity impeded without this service: 6%
  - My household would rather the service was available but could manage without it: 9%
  - My household could manage but only for a limited period without it: 20%
  - My household would struggle to function without it: 65%

**Mean # days household able to cope without service**

- Landline telephone: 45.4 days
- Fixed Internet connection: 6.2 days
- Mobile phone: 10.5 days
Internet likely to have been changed/upgraded more recently than landline for calls. More than a quarter have changed/upgraded broadband services within the past 2 years.

When last changed supplier or upgraded existing service

Within last 5 years:

- 44% within last 2 years
- 33% 2-5 years ago
- 44% 5 to 10 years ago
- 19% 10 or more years ago
- 22% never/can’t remember

Landline used only for Broadband

Landline used for making & receiving calls

Fixed Broadband Internet

C1 When did you last change your (service) supplier or upgrade your existing service with the same supplier?
Base: All Consumers with LL used only for BB n=432, all with LL used for making/receiving calls n=1509, all with fixed broadband internet n=1794
Price is the dominant factor in choice of provider across services. With Internet, Broadband speed and reliability are key for around a third. Bundling is important for some in relation to Landline and Broadband (most likely bundled together).

Main factors that influenced choice of provider (unprompted)

- **Price**: 68%
- **Bundled with other services**: 33%
- **Reliability**: 24%
- **Trusted brand**: 17%
- **Only one available in area at time**: 4%
- **Speed of installation**: 3%
- **Responsiveness to faults**: 3%
- **Customer service**: 2%
- **Can’t remember**: 4%

**Data**

- **Price**: 62%
- **Broadband speed**: 35%
- **Reliability**: 30%
- **Bundled with other services**: 29%
- **Trusted brand**: 16%
- **Customer service**: 8%
- **Only one available in area at time**: 6%
- **Speed of installation**: 4%
- **Responsiveness to faults**: 1%
- **Can’t remember**: 1%

- **Price**: 67%
- **Data allowance**: 20%
- **Reliability**: 19%
- **Trusted brand**: 15%
- **Data coverage**: 11%
- **Broadband speed**: 11%
- **Bundled with other services**: 11%
- **Choice of handsets**: 11%
- **Voice call coverage**: 10%
- **Customer service**: 10%
- **Voice call quality**: 7%
- **Only one available in area at time**: 5%
- **Responsiveness to faults**: 3%
- **Can’t remember**: 6%

C2a/b/c. Thinking back to when you chose your (service), what were the main factors that influenced your choice of provider?

**Base:** All Consumers that have a landline but no fixed broadband and changed their provider in the last 10 years n=96, all that have a fixed broadband connection and changed their provider in the last 10 years n=1479, all with a mobile service n=1931
Section 3
Experience of and impact of loss of service/delayed provisioning
Two-fifths (41%) have switched any of landline or broadband in the past 5 years

Switching providers/services

- Not changed LL or BB in past 5 years: 59%
- All changed LL (only) in last 5 years: 11%
- All changed BB (only) in last 5 years: 4%
- Changed LL & BB in past 5 years: 27%

- 95% changed both together
- 1% changed LL most recently
- 4% changed BB most recently

C1 When did you last change your supplier or upgrade your service with existing supplier? Base: All Consumers with LL used only for BB n=432, all with LL used for making/receiving calls n=1509, all with fixed broadband internet n=1794. E1a You said earlier that you have changed or upgraded your landline and broadband services in the last two/five years. Did you change both services at the same time to the same provider? E1b (If did not change both services at the same time) Which service did you change or upgrade more recently? Base: All that changed or upgraded their landline and broadband in the last five years n=586.
1 in 3 of those changing their LL and BB together did not previously have existing services in their premises

Scenario last time changed or upgraded service

- No existing service: 20% (Landline only), 20% (Broadband only), 33% (LL & BB together)
- Change/upgrade existing provider, service maintained: 20% (Landline only), 32% (Broadband only), 16% (LL & BB together)
- Change/upgrade existing provider, temporary loss service: 6% (Landline only), 5% (Broadband only), 4% (LL & BB together)
- Switch to new provider, temporary loss service: 13% (Landline only), 7% (Broadband only), 9% (LL & BB together)
- Switch to new provider, service maintained: 30% (Landline only), 22% (Broadband only), 29% (LL & BB together)
- Switch to new provider, service loss due to own choices: 3% (Landline only), 8% (Broadband only), 5% (LL & BB together)
- Other/DK: 8% (Landline only), 8% (Broadband only), 4% (LL & BB together)

E2 Which of these scenarios applied to the last time you changed or upgraded your service?

Base: All Consumers that have changed landline only/broadband only/landline & broadband together in the last 5 years n=79*/223/554

*CAUTION LOW BASE
On average 6.4 days to service activation for Landline only. 94% said this was in line with provider information and 92% felt the time taken was reasonable.

Scenario last time changed or upgraded service

- **No existing service**
- **Change/upgrade existing provider, service maintained**
- **Change/upgrade existing provider, temporary loss service**
- **Switch to new provider, temporary loss service**
- **Switch to new provider, service maintained**
- **Switch to new provider, service loss due to own choices**
- **Other/DK**

### Service activation/upgrade (days)

- **Mean (days)**: 6.4

### In line with time period given by provider?

- 94%

### Reasonable timing?

- 92%

E2 Which of these scenarios applied to the last time you changed or upgraded your service? Base: All Consumer that have changed landline most recently in the last 5 years n=79* E3 Did you move home at the same time? Base: All not 'other/dk' at E2 n=74*. E4 Did the change or upgrade require an engineer to visit your home to install new lines or other equipment? Base: All not 'no existing service' 'service loss due to own choices' or 'other/dk' at E2 n=54*. E5 Approximately how many calendar days after placing the order was the service activated or upgraded? Base: all that had a new landline service n=72* (not including other/dk or those without service due to own choices at E2). E5b And was this in line with the time period you had been given by your provider? E6a Do you think the time it took was reasonable? Base: All where service activated n=72*
On average 8.5 days to service activation for Broadband only. 93% said this was in line with provider information and 88% felt the time taken was reasonable.

**Scenario last time changed or upgraded service**

- No existing service: 20%
- Change/upgrade existing provider, service maintained: 32%
- Change/upgrade existing provider, temporary loss service: 28%
- Switch to new provider, temporary loss service: 5%
- Switch to new provider, service maintained: 7%
- Switch to new provider, service loss due to own choices: 22%
- Other/DK: 8%

**Service activation/upgrade (days)**

- Zero: 1%
- One: 13%
- Two: 9%
- Three: 8%
- Four: 5%
- Five: 7%
- Six: 1%
- Seven: 20%
- 8 to 10: 11%
- 11 to 14: 14%
- 15 to 21: 4%
- 22+ days: 7%
- Not yet: 1%

**Mean (days)**: 8.5

**In line with time period given by provider?**

- Yes: 93%

**Reasonable timing?**

- Yes: 88%

Of the 23 who said no, the average (mean) was 5 days to be reasonable.

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E2 Which of these scenarios applied to the last time you changed or upgraded your service? Base: All Consumer that have changed broadband most recently in the last 5 years n=223
E3 Did you move home at the same time? Base: All not ‘other/dk’ at E2 n=204
E4 Did the change or upgrade require an engineer to visit your home to install new lines or other equipment? Base: All not ‘no existing service’, ‘service loss due to own choices’ or ‘other/dk’ at E2 n=145
E5 Approximately how many calendar days after placing the order was the service activated or upgraded? Base: all that had a new broadband service n=185 (not including other/dk or those without service due to own choices at E2).
E6a Do you think the time it took was reasonable? Base: All where service activated n=184
On average 10.8 days to service activation for combined Landline & Broadband. 92% said this was in line with provider information and 86% felt the time taken was reasonable.

Scenario last time changed or upgraded service

- No existing service
- Change/upgrade existing provider, service maintained
- Change/upgrade existing provider, temporary loss service
- Switch to new provider, temporary loss service
- Switch to new provider, service maintained
- Switch to new provider, service loss due to own choices
- Other/DK

Mean (days) 10.8

In line with time period given by provider? 92%

Reasonable timing? 86%

E2 Which of these scenarios applied to the last time you changed or upgraded your service? Base: All Consumer that have changed landline & broadband together in the last 5 years n=554. E3 Did you move home at the same time? Base: All not ‘other/dk’ at E2 n=530. E4 Did the change or upgrade require an engineer to visit your home to install new lines or other equipment? Base: All not ‘no existing service’, ‘service loss due to own choices’ or ‘other/dk’ at E2 n=323. E5 Approximately how many calendar days after placing the order was the service activated or upgraded? Base: all that had a new landline & broadband service n=501 (not including other/dk or those without service due to own choices at E2). E5b And was this in line with the time period you had been given by your provider? E6a Do you think the time it took was reasonable? Base: All where service activated n=500

E2: 33%
E3: 40%
E4: 44%
E5: 29%
E5b: 10.8
E6a: 86%
5% of our sample had experienced loss of service during provisioning or upgrading for any of LL, BB or LL&BB). On average this loss was 9 days.

Experience of loss of service (any service) during provisioning or upgrading - how long without the service?

Mean (days) 9.1

Base sizes too low to analyse by specific services

- < one hour: 17%
- 1-6 hours: 11%
- 6-24 hours: 2%
- 1 day: 17%
- 2 days: 11%
- 3-5 days: 12%
- 6-10 days: 13%
- 11-20 days: 9%
- 21-50 days: 6%
- Over 50 days: 2%
- Don't know: 9%

E8 You said earlier that you experienced a loss of service during provisioning or upgrading. How long were you without service during the changeover period? Base: all consumer that experienced loss of service during provisioning or upgrading n=112
Amongst past switchers, a reasonable activation time to acquire the service from scratch would be around a week for Internet or Landline/Internet combined (slightly lower for landline only)

(Amongst switchers in past 5 years): If didn’t have service at all, what would be reasonable activation time?

<table>
<thead>
<tr>
<th>Mean (days)</th>
<th>5.5</th>
<th>6.5</th>
<th>6.6</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt; one day</td>
<td>0%</td>
<td>1%</td>
<td>0%</td>
</tr>
<tr>
<td>One</td>
<td>6%</td>
<td>6%</td>
<td>7%</td>
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<tr>
<td>Two</td>
<td>28%</td>
<td>22%</td>
<td>12%</td>
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<tr>
<td>Three</td>
<td>9%</td>
<td>9%</td>
<td>9%</td>
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<td>Four</td>
<td>9%</td>
<td>5%</td>
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<td>Five</td>
<td>8%</td>
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<td>Six</td>
<td>0%</td>
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<td>Seven</td>
<td>27%</td>
<td>28%</td>
<td>33%</td>
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<td>8 to 10</td>
<td>3%</td>
<td>5%</td>
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<tr>
<td>11 to 14</td>
<td>8%</td>
<td>10%</td>
<td>12%</td>
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<tr>
<td>15 to 21</td>
<td>0%</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>22+ days</td>
<td>2%</td>
<td>3%</td>
<td>1%</td>
</tr>
</tbody>
</table>

E7 I’d like you to imagine that you did not have (service) at all and had placed an order to have the service installed. How many days would you consider it reasonable to wait for it to be activated? Base: all consumers who had switched landline/broadband/both most recently in past 5 years and had existing landline service n=61*, broadband n=183, landline & broadband n=376. *CAUTION LOW BASE
Amongst all with the service, on average a week (6.6 days) would be acceptable for landline activation; slightly lower for broadband (5.8 days).

If didn’t have service at all, what would be reasonable activation time?

<table>
<thead>
<tr>
<th>Mean (days)</th>
<th>6.6</th>
<th>5.8</th>
</tr>
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<tbody>
<tr>
<td>&lt; one day</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>One</td>
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<td>14%</td>
</tr>
<tr>
<td>Two</td>
<td>15%</td>
<td>14%</td>
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<tr>
<td>Three</td>
<td>11%</td>
<td>10%</td>
</tr>
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<td>Four</td>
<td>4%</td>
<td>6%</td>
</tr>
<tr>
<td>Five</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>Six</td>
<td>2%</td>
<td>1%</td>
</tr>
<tr>
<td>Seven</td>
<td>28%</td>
<td>29%</td>
</tr>
<tr>
<td>8 or more</td>
<td>17%</td>
<td>16%</td>
</tr>
</tbody>
</table>

G16 I’d like you to imagine that you did not have (service) at all and had placed an order to have the service installed. How many days would you consider it reasonable to wait for it to be activated? Base: all consumer with a landline n=1961; all with broadband n=1798.
Section 4
Experience of and impact of loss of service
Within the last 2 years, a quarter (24%) have ever experienced complete loss of service for more than one hour.

Experience loss of service in last 2 years

- None: 76%
- Broadband: 21%
- Landline: 10%

Most recent loss of service

- Landline & Broadband together: 10%
- Broadband ONLY: 12%
- Landline ONLY: 2%

E9a Over the last 2 years, have you experienced a complete loss of service for more than one hour for the following services taken by your household? By loss of service, we mean complete inability to make or receive voice calls or to access the internet. Please don’t include instances when your connection speed was slower than usual, but do include those that occurred as a result of a fault on your existing service. E9b Did you lose your landline and your broadband service at the same time? E9c Which service did you lose most recently? E9d When you lost your landline service did you also lose your broadband at the same time? E9e When you lost your broadband service did you also lose your landline at the same time? Base: Total Sample Consumers n=2088
Overall, 29% had experienced any loss or delay with regard to their fixed line telecommunications services. The vast majority of these were related to loss of existing services due to a fault, rather than issues with provisioning/upgrading.

% incidence in each group within the CONSUMER population

- New service Delayed Provisioning n=19 (1%)
- Delayed Provisioning n=25 (2%)
- Loss of service during provisioning or upgrading n=63 (5%)
- Loss of service due to a fault n=450 (24%)
- Did not have existing service at property. Provisioning NOT within time-scale given
- Provisioning NOT within time-scale given
- Any loss/delay 29%
- NO loss/delay 71%

Base: All Consumer n=2088
On average, a complete LoS lasts 3.5 days. A LoS involving broadband (only) lasts a day less (2.7 days) and a reported LoS a day more (4.4 days), whereas a loss of service during provisioning or upgrading lasts approximately 2 days.

**How long experienced loss of service for?**

<table>
<thead>
<tr>
<th>Mean (days)</th>
<th>Loss of service</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Any Loss of service</strong></td>
<td></td>
</tr>
<tr>
<td>Median 1.0</td>
<td>3.5</td>
</tr>
<tr>
<td>broadband only</td>
<td></td>
</tr>
<tr>
<td>Median 0.3</td>
<td>2.7</td>
</tr>
<tr>
<td>Any landline</td>
<td></td>
</tr>
<tr>
<td>Median 2.0</td>
<td>4.5</td>
</tr>
<tr>
<td>Reported LoS</td>
<td></td>
</tr>
<tr>
<td>Median 2.0</td>
<td>4.4</td>
</tr>
<tr>
<td>Non-reported LoS</td>
<td></td>
</tr>
<tr>
<td>Median 0.1</td>
<td>0.6</td>
</tr>
</tbody>
</table>

| Loss of service during provisioning or upgrading | |
| < one hour | 3% |
| 1-6 hours | 18% |
| 6-12 hours | 3% |
| 12-18 hours | 0 |
| 18-23 hours | 0 |
| 1 day | 14% |
| 2 days | 6% |
| 3-5 days | 7% |
| 6-10 days | 8% |
| 11-20 days | 0 |
| 21-50 days | 0 |
| 50+ days | 0 |
| Unresolved | 41% |

F1 Thinking about the most recent loss of your landline due to a fault / delay in service change or upgrade on your landline/broadband/ how long did you experience a loss of service for? Base: All that experienced a loss of service n=450, broadband n=228, landline n=222

Base: All that experienced loss of service during provisioning or upgrading n=63 *CAUTION LOW BASE
On average, three-quarters reported their fault to their provider. Of these, more than half made contact within the hour - almost exclusively via the telephone and half just once.

**Experience of loss of service (any service)**

- **ANY: Loss of service**
  - YES: 77%
  - 53% contacted once, 19% twice, 28% 3+ times
  - 95% contacted via phone, 2% email, 2% webchat, 3% other

**Why NOT reported?**
- Didn't think would last long/wait much longer: 37%
- Fixed/installed before had time to report: 22%
- Looked at provider website for updates: 21%
- Don't know: 21% (DK 2%)

**Mean:**
- How long wait after loss did you contact your provider? Mean: 0.5 days
- How long did it take for service to be restored after first notification? Mean: 4.3 days

---

F2a Did you report your Landline/Broadband/Landline & Broadband loss of service / delay in your new order to your provider? Base: Loss of service n=450 F2b why did you not contact your provider Base: all not reporting n=96*. F2c How long after you (lost service/expected service to be installed/upgraded) did you contact the provider to let them know? F2d How did you contact your provider? F2e How many times did you contact your provider? F5 How long did it take for your service to be restored after you first notified your provider of the issue? BASE: all who reported n=348. *CAUTION LOW BASE
Those losing any landline service were more likely to report it to their provider.

**Experience of loss of service - Any loss vs. broadband only vs. Any landline**

Reported to provider?

<table>
<thead>
<tr>
<th>Any loss of service</th>
<th>broadband only</th>
<th>Any landline</th>
</tr>
</thead>
<tbody>
<tr>
<td>77%</td>
<td>72%</td>
<td>82%</td>
</tr>
</tbody>
</table>

How reported?

- 53% contacted once
- 19% twice
- 28% 3+ times
- 95% via phone
- 2% email
- 2% webchat
- 3% other

No significant differences by BB only vs. Any LL

Why NOT reported?

- Didn't think would last long/wait much longer: 37%
- Fixed/installed before had time to report: 22%
- Looked at provider website for updates: 21%
- Other: 30%

F2a Did you report your Landline/Broadband/Landline & Broadband loss of service / delay in your new order to your provider? Base: Loss of service n=450, broadband n=228, landline n=222. F2b why did you not contact your provider Base: all not reporting n=96*. F2c How long after you (lost service/expected service to be installed/upgraded) did you contact the provider to let them know? F2d How did you contact your provider? F2e How many times did you contact your provider? F5 How long did it take for your service to be restored after you first notified your provider of the issue? BASE: all who reported n=348. *CAUTION LOW BASE
On average, it takes 4.3 days to restore a service. Broadband (only) losses are restored more quickly.

Experience of loss of service (any service) - amongst those reporting a LoS

How long wait after loss/expectation before contacting provider?
How long did it take for service to be restored after first notification?

F2c How long after you (lost service/expected service to be installed/upgraded) did you contact the provider to let them know?
F5 How long did it take for your service to be restored after you first notified your provider of the issue?

BASE: all who reported n=348, broadband only n=164, any landline n=184
Only a quarter reported a loss of service during provisioning or upgrading to their provider.

**Experience of loss of service (any service) during provisioning or upgrading**

Reported to provider?

- **YES** 25%
  - ANY: Loss of service during provisioning or upgrading

- **NO** 58%
  - (DK 17%)
Consumers become increasingly dissatisfied with their provider’s ability to resolve the issue as the length of time to resolve increases.

<table>
<thead>
<tr>
<th>Loss of Service</th>
<th>Very satisfied</th>
<th>Fairly satisfied</th>
<th>Neither/nor</th>
<th>Fairly dissatisfied</th>
<th>Very dissatisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Up to 1 day</td>
<td>43%</td>
<td>10%</td>
<td>12%</td>
<td>14%</td>
<td>20%</td>
</tr>
<tr>
<td>1-3 days</td>
<td>49%</td>
<td>10%</td>
<td>17%</td>
<td>10%</td>
<td>14%</td>
</tr>
<tr>
<td>2 days or more</td>
<td>29%</td>
<td>11%</td>
<td>17%</td>
<td>39%</td>
<td>34%</td>
</tr>
<tr>
<td>More than 3 days</td>
<td>7%</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
<td>4%</td>
</tr>
</tbody>
</table>

**Total “satisfied”**

- **54%** Very satisfied
- **76%** Fairly satisfied
- **65%** Neither/nor
- **34%** Fairly dissatisfied
- **13%** Very dissatisfied

F6 Overall, how satisfied or dissatisfied were you with the length of time it took your provider to resolve your loss of service for your (service), using the following scale? Base: All with a complete loss of service n=450; F5 How long did it take for your service to be restored after you first notified your provider of the issue? BASE: all who reported n=348, all where service restored within 1 day n=105, 1-3 days n=136, 2 days or more n=162, more than 3 days n=83 *CAUTION LOW BASE
Just over half were satisfied with their provider’s ability to resolve their loss of service.

**Satisfaction with provider ability to resolve loss of service**

<table>
<thead>
<tr>
<th>Total “satisfied”</th>
<th>54%</th>
<th>52%</th>
<th>56%</th>
<th>56%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very satisfied</td>
<td>18%</td>
<td>17%</td>
<td>18%</td>
<td>36%</td>
</tr>
<tr>
<td>Fairly satisfied</td>
<td>37%</td>
<td>36%</td>
<td>38%</td>
<td>20%</td>
</tr>
<tr>
<td>Neither/nor</td>
<td>12%</td>
<td>9%</td>
<td>14%</td>
<td>11%</td>
</tr>
<tr>
<td>Fairly dissatisfied</td>
<td>10%</td>
<td>11%</td>
<td>10%</td>
<td>6%</td>
</tr>
<tr>
<td>Very dissatisfied</td>
<td>20%</td>
<td>25%</td>
<td>15%</td>
<td>7%</td>
</tr>
<tr>
<td>DK/NA</td>
<td>4%</td>
<td>3%</td>
<td>5%</td>
<td>18%</td>
</tr>
</tbody>
</table>

Any LoS | Any LL LoS | BB only LoS | Temp LoS during provisioning or upgrading

No difference in satisfaction by reported vs not reported.

F6 Overall, how satisfied or dissatisfied were you with the length of time it took your provider to resolve your loss of service for your (service), using the following scale? Base: All with a complete loss of service n=450, landline or landline & broadband loss of service n=222, broadband only loss of service n=228. Loss of service during provisioning or upgrading n=63.

37.
Two fifths of those experiencing a loss of service claim it had a negative impact on their day to day activities. A reported loss or a loss involving a landline are more likely to lead to negative impacts, anxiety and stress.

Two fifths of those experiencing a loss of service during provisioning or upgrading claim it had no adverse affects on their household.

**Household impacts (Loss of Service)**

- **Negative impact on day to day activities**
  - Any: 46
  - Any LL: 38
  - BB only: 13
  - Loss during P/U: 7
  - Other: 3
  - Did not affect household: 4
  - Don’t know: 3

  **Reported losses** tend have a more **negative impact on day to day activities** (47% vs 27%) and cause more **anxiety and stress** (33% vs 19%)

- **Found alternative workaround**
  - Any: 43
  - Any LL: 35
  - BB only: 25
  - Loss during P/U: 27
  - Other: 7
  - Did not affect household: 21
  - Don’t know: 13

  **Non-reported losses** are less likely to affect the household (35% vs 20%)

---

F7a Which, if any, of the following would you say applied to your most recent loss of service. Base: All that experienced a loss of service, n=450 (reported n=348, not reported n=96*), loss of landline or landline & broadband n=222, broadband only n=228, Base: loss of service during provisioning or upgrading n=63*.

*CAUTION LOW BASE
Amongst those who found an alternative workaround, mobiles were heavily used as a substitute; largely with no direct financial cost associated.

Experience of a loss of service

Found an alternative workaround

- Any loss of service: 35%
  - Broadband only: 27%
  - Any landline: 43%
  - Loss during P/U: 25%

Actions taken to reduce impact

- Used mobile to make calls: 74%
- Used mobile to receive calls: 56%
- Used mobile to access emails: 53%
- Used mobile to access Internet: 49%
- Used mobile wifi instead: 18%
- Went/worked from other location: 11%
- Used backup Internet connection: 8%
- Tethered laptop to mobile via wifi: 7%
- Used dongle: 1%
- Other: 3%
- Didn’t do anything: 4%

Direct financial costs of these actions

- <£10: 9%
- £11-20: 3%
- £21-50: 3%
- More than £50: 6%
- No cost: 67%
- Don’t know: 12%

Base: All who found an alternative workaround – any service n=152, any landline n=91*, broadband only n=61*. *CAUTION LOW BASE

F7a Which, if any, of the following would you say applied to your most recent loss of service OR delay to activation or upgrade of your service? Base: All that experienced a loss of service Total n=450. F7b> What, if anything, did you do to reduce the impact of this [telephone landline / fixed broadband] loss of service / delay to activation or upgrade of your service? Base: all who found an alternative workaround n=160, any landline n=96*, broadband only n=64*. F7c> Thinking about the factors you mentioned, what were the direct financial costs to you (e.g. cost of mobile calls) and the people in your household that were caused by your most recent loss of service / delay in service installation? Base: all that did something and found an alternative workaround – any service n=152, any landline n=91*, broadband only n=61*. *CAUTION LOW BASE
Two thirds of those that found a workaround claim that it had a negative impact on their normal activities.

**Extent to which normal activities affected by workaround/loss of service**

<table>
<thead>
<tr>
<th>Total “had an impact”</th>
<th>Any loss of service</th>
<th>broadband only</th>
<th>Any landline</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>62%</td>
<td>58%</td>
<td>65%</td>
</tr>
<tr>
<td></td>
<td>55%</td>
<td>54%</td>
<td>55%</td>
</tr>
<tr>
<td>0 - not affected</td>
<td>13%</td>
<td>20%</td>
<td>9%</td>
</tr>
<tr>
<td></td>
<td>9%</td>
<td>12%</td>
<td>7%</td>
</tr>
<tr>
<td>1</td>
<td>16%</td>
<td>17%</td>
<td>18%</td>
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<td></td>
<td>15%</td>
<td>17%</td>
<td>12%</td>
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<td>2</td>
<td>25%</td>
<td>24%</td>
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<tr>
<td></td>
<td>19%</td>
<td>24%</td>
<td>12%</td>
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<tr>
<td>3</td>
<td>18%</td>
<td>15%</td>
<td>21%</td>
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<td></td>
<td>16%</td>
<td>15%</td>
<td>16%</td>
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<tr>
<td>4</td>
<td>19%</td>
<td>15%</td>
<td>21%</td>
</tr>
<tr>
<td></td>
<td>20%</td>
<td>15%</td>
<td>26%</td>
</tr>
<tr>
<td>5 - very great impact</td>
<td>Found workaround</td>
<td>16%</td>
<td>21%</td>
</tr>
<tr>
<td></td>
<td>No workaround</td>
<td>15%</td>
<td>15%</td>
</tr>
</tbody>
</table>

Base too small to look at this by loss of service due to provisioning or upgrading.
Key negative impacts of loss were an inability to use WiFi or contact/be contacted.

Experience of a loss of service

Loss/delay had a negative impact on day to day activities

Any loss of service

Any of following applied?

Unable use WiFi

People unable to contact/be contacted

Unable complete household tasks

Unhappiness/arguments in household

Negative impact on work related activities

Missed/rearranged gatherings/appointments

Incurred bank charges/late payment

Other

None of these

F9 Did any of the following apply to your most recent loss of [relevant service] OR delay in installation / upgrade? Base: all that had a negative impact all loss of service n=186, broadband only n=84, any landline n=102. *CAUTION LOW BASE
The majority (89%) of those who took time to try and resolve their loss of service, called their provider. About half spent time trying to fix it themselves.

### Experience of a loss of service

**Took time to try to resolve loss of service**

- **25%**

### Actions taken to try to resolve

- **Called provider**: 89%
- **Spent time trying to fix by self**: 47%
- **Other**: 9%

### Time taken trying to get services fixed

- **< 1 hour**: 15%
- **1-6 hours**: 37%
- **6-12 hours**: 4%
- **1 day**: 7%
- **2 days**: 10%
- **2-5 days**: 9%
- **Longer**: 5%
- **None**: 6%
- **Don’t know**: 7%

**Mean amongst those saying less than one day**: 0.2 (median 0.1) days

**Mean**: 2.5 days

F8a What did you do to try to resolve your loss of service? F8b How much time did you and other people in your household spend trying to get your service(s) fixed? Please think about all the things that you and others in your household spent time on to resolve the loss (e.g. time spent on the phone with your provider or time spent trying to fix the problem yourselves). It should not include the time spent waiting for an engineer visit(s).

Base: all loss of service that took time to resolve n=107
Two thirds state that the loss of service had an impact on the communication needs of their household. This impact increases when the LoS is reported.

### Impact of loss of service on communication needs of household

<table>
<thead>
<tr>
<th>Total “had an impact”</th>
<th>63%</th>
<th>67%</th>
<th>59%</th>
<th>37%</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Reported 69%</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Non-reported 41%</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **0** - no impact at all
- **1**
- **2**
- **3**
- **4**
- **5** - very great impact

<table>
<thead>
<tr>
<th>Any LoS</th>
<th>Any LL LoS</th>
<th>BB only LoS</th>
<th>LoS during provisioning/upgrading</th>
</tr>
</thead>
<tbody>
<tr>
<td>9%</td>
<td>11%</td>
<td>7%</td>
<td>9%</td>
</tr>
<tr>
<td>13%</td>
<td>14%</td>
<td>19%</td>
<td>26%</td>
</tr>
<tr>
<td>14%</td>
<td>14%</td>
<td>22%</td>
<td>21%</td>
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<tr>
<td>21%</td>
<td>19%</td>
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<td>22%</td>
<td>19%</td>
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<td>27%</td>
<td>33%</td>
<td>22%</td>
<td>13%</td>
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<tr>
<td>8%</td>
<td>19%</td>
<td>15%</td>
<td>9%</td>
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<tr>
<td>19%</td>
<td>15%</td>
<td>15%</td>
<td>17%</td>
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<tr>
<td>21%</td>
<td>22%</td>
<td>15%</td>
<td>7%</td>
</tr>
<tr>
<td>26%</td>
<td>26%</td>
<td>13%</td>
<td>11%</td>
</tr>
</tbody>
</table>

**Base:** All consumer that experienced a loss of service n=450 (reported n=348, not reported n=96*), any landline loss (landline or landline and broadband) n=222, broadband only loss of service n=228, loss of service due to provisioning or upgrading n=63*  *CAUTION LOW BASE
Three fifths state that the loss of their service had an impact on the household generally. Again, this impact increases when the LoS is reported.

Impact of loss of service on household generally

<table>
<thead>
<tr>
<th>Total “had an impact”</th>
<th>58%</th>
<th>61%</th>
<th>55%</th>
<th>31%</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>0 - no impact at all</td>
<td>13%</td>
<td>13%</td>
<td>14%</td>
<td>16%</td>
</tr>
<tr>
<td>1</td>
<td>14%</td>
<td>14%</td>
<td>16%</td>
<td>16%</td>
</tr>
<tr>
<td>2</td>
<td>23%</td>
<td>21%</td>
<td>24%</td>
<td>24%</td>
</tr>
<tr>
<td>3</td>
<td>14%</td>
<td>15%</td>
<td>13%</td>
<td>18%</td>
</tr>
<tr>
<td>4</td>
<td>21%</td>
<td>25%</td>
<td>18%</td>
<td>10%</td>
</tr>
<tr>
<td>5 - very great impact</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

F15 How much of an impact did the loss of your {relevant service} / delay in service activation or upgrade have on your household? Base: All consumer that experienced a loss of service n=450 (reported n=348, not reported n=96*), any landline loss (landline or landline and broadband) n=222, broadband only loss of service n=228, loss of service due to provisioning or upgrading n=63*. *CAUTION LOW BASE
Overall, 1 in 4 had spend time waiting in for engineer visit(s), with 1 in 10 taking time off work in order to do so

Incidence of waiting for engineer visit(s) or taking time off work

Proportion had to spend time waiting in for engineer visit(s)

- Any loss of service: 27% (any loss of service)
- Broadband only: 20%
- Any landline: 34%
- LoS during provisioning /upgrading: 29%

You/others in household have to take time off work?

- Any loss of service
  - No: 87%
  - Not sure: 3%
  - Unpaid: 6%
  - Paid/holiday: 4%
- Any landline
  - No: 87%
  - Not sure: 3%
  - Unpaid: 6%
  - Paid/holiday: 4%
- Broadband only
  - No: 85%
  - Not sure: 11%
  - Unpaid: 2%
  - Paid/holiday: 2%

F13 Did you, or people in your household have to wait in for an engineer to visit? F14a Did you or any other people in your household need to take time off work as a consequence of your loss of service? Base: All that experienced a loss of service n=450; any Landline n=222; Broadband only n=228, loss of service due to provisioning or upgrading n=63* *CAUTION LOW BASE
Section 5
Compensation for loss of service
7% had received compensation for a loss of service and 4% for a loss of service due to provisioning or upgrading.

**Compensation**

- **Any loss of service:**
  - Asked & received: 82%
  - Not asked but received: 3%
  - Asked & NOT received: 4%
  - NOT asked, NOT received: 5%
  - Don't know: 7%

- **Broadband only:**
  - Asked & received: 87%
  - Not asked but received: 3%
  - Asked & NOT received: 4%
  - NOT asked, NOT received: 3%
  - Don't know: 5%

- **Any landline:**
  - Asked & received: 78%
  - Not asked but received: 9%
  - Asked & NOT received: 2%
  - NOT asked, NOT received: 3%
  - Don't know: 6%

- **Loss during provisioning/upgrading:**
  - Asked & received: 82%
  - Not asked but received: 8%
  - Asked & NOT received: 2%
  - NOT asked, NOT received: 4%
  - Don't know: 6%
The vast majority had not asked for compensation - key reasons being a lack of expectation or a belief that it wouldn’t be worth the effort

Experience of loss of service or delayed provisioning

Received compensation for loss of service/delayed provisioning?

**YES 8%**

- **Asked for compensation?**
  - **Asked** 7%
  - **Did not ask** 88%
  - **Don’t know** 5%

- **Why not ask?**
  - Didn’t expect to get 31%
  - Too much hassle 26%
  - Not worth it 18%
  - Not provider’s fault 15%
  - Didn’t know how 15%
  - Forgot 7%
  - Outage resolved 4%
  - Didn’t occur to me 4%
  - Not necessary 3%
  - Assumed asked for 3%
  - Not interested 1%
  - Changing providers 1%
  - Other 3%

H1a Did you receive any compensation from your provider for this loss of service/delay in installation/activation? All that experienced a loss of service or delay provisioning (any service) n=557 H1c/d Did you ask for compensation or was it offered/did you ask for compensation in regard to the loss of service? Base: all that did not receive compensation n=514. H1e Why did you not ask for compensation? Base: all who did not get or ask for compensation n=454.
30% of consumers expect to be compensated for the impact that the loss of service had on their household. On average, they would expect approximately £35 (£10 per day) - to be paid as a credit on their account or in cash.

**Expected compensation (amongst all with complete loss of service yet not received/asked/offered)**

<table>
<thead>
<tr>
<th>Level of payment enough to compensate household for impact</th>
<th>Median 0.0</th>
</tr>
</thead>
<tbody>
<tr>
<td>£92 excl. no need</td>
<td>£34</td>
</tr>
<tr>
<td>£10</td>
<td>7%</td>
</tr>
<tr>
<td>£11-25</td>
<td>8%</td>
</tr>
<tr>
<td>£26-50</td>
<td>8%</td>
</tr>
<tr>
<td>£51-100</td>
<td>3%</td>
</tr>
<tr>
<td>£101-200</td>
<td>2%</td>
</tr>
<tr>
<td>£201+</td>
<td>2%</td>
</tr>
<tr>
<td>No need, no adverse impact</td>
<td>51%</td>
</tr>
<tr>
<td>Don't know</td>
<td>19%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Form would expect compensation to take</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Credit on account</td>
<td>64%</td>
</tr>
<tr>
<td>Cash</td>
<td>36%</td>
</tr>
<tr>
<td>Future discounts/reductions</td>
<td>7%</td>
</tr>
<tr>
<td>Free service upgrade</td>
<td>7%</td>
</tr>
</tbody>
</table>

**Level of payment enough to compensate household for impact (per day) £10**

Due to the combination of questions this is based on a combined and unweighted sample, excluding those requesting compensation of > £1,000.

- **H1g**: What was the monetary value of this compensation? Base: All that received compensation from the provider and found it reasonable at H1h (n=14) <H1i> How much would have been enough to compensate for the (problem) you experienced? Base: All that received compensation from the provider and did not find it reasonable at H1g (n=12) <H1k> Thinking back to the loss of service you have described and all of the impacts that the loss of service had on your household what level of payment do you think would be enough to compensate your household for that impact? All who experienced a complete loss of service but did not receive ask for or get compensation n=368, any landline los n=171, broadband only los n=197. H1l What form would you like that compensation to take? Base: all giving an amount n=111

**Level of payment enough to compensate household for impact**

- **£92 excl. no need**
- **£63 excl. no need**
- **£64 excl. no need**
- **£132 excl. no need**

**Income brackets**

<table>
<thead>
<tr>
<th>Income bracket</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>£201+</td>
<td>7%</td>
</tr>
<tr>
<td>£101-200</td>
<td>2%</td>
</tr>
<tr>
<td>£51-100</td>
<td>3%</td>
</tr>
<tr>
<td>£26-50</td>
<td>8%</td>
</tr>
<tr>
<td>£11-25</td>
<td>8%</td>
</tr>
<tr>
<td>£92 excl. no need</td>
<td>7%</td>
</tr>
<tr>
<td>£34</td>
<td>30%</td>
</tr>
<tr>
<td>Median 0.0</td>
<td></td>
</tr>
</tbody>
</table>

**Median 0.0**

**H1k**
1 in 10 (8%) changed supplier as a direct result of their loss of service and a similar proportion either looked into changing but decided to stay (7%) or are actively looking to change (7%). 2 in 5 respondents accept that services losses occur from time to time and a quarter are happy with the response of their provider.

Experience of loss of service

Impact on attitudes to supplier relationship

- You accepted that service loss occurs sometimes
- Happy with their response to dealing with the issue
- Changed supplier since the problem occurred as a direct result of the issue
- Looked into changing supplier as a direct result of the issue but decided not to because you were still...
- You are actively looking to change your supplier as a direct result of the issue
- You looked into changing supplier as a direct result of the issue but decided not to because of other reasons
- Thought about changing supplier as a direct result of the issue but have not looked into it
- No impact
- Other

H1m Taking everything into account that happened when you lost service, the processes you went through and the time taken to get your service restored, has this had any of the following effects on your attitudes towards your relationship with the supplier?

Base: All who experienced loss of service n=450; any landline (LL or LL&BB) loss of service n=222, BB only loss of service n=228, loss of service due to provisioning or upgrading n=63* \*CAUTION LOW BASE
Section 6
Experience of missed appointments and compensation
1 ½ days, on average, is considered reasonable notice of a cancellation/change to an engineer appointment. Two-fifths would say 24 hours.

Reasonable notice for an engineer appointment to be cancelled or changed by provider

- **1 day (24h):** 44%
- **2 days:** 28%
- **< 1 day:** 15%
- **More than 2 days:** 13%

Mean 1.6 days

No difference by those that have had a service issue in the last 2 years

I1 Some telephone line or broadband installation or repair processes require an engineer to visit the customer’s home to carry out the work. Customers are usually given a specific time slot within which to expect the engineer’s visit and sometimes engineers fail to arrive within the allotted time slot. What do you consider to be a reasonable amount of notice for an engineer appointment to be cancelled or changed by your provider? Please give your answer in hours or days.

Base: Total Sample Consumer n=2088
4% have had experience of a missed appointment. 3 in 5 of these rearranged their appointment for another day, whilst the engineer turned up later that day for 1 in five.

**Experience of a missed appointment**

**Ever experienced?**

- 4%

**How many in last 2 years?**

- One: 45%
- Two: 17%
- Three: 3%
- Four: 6%
- Five or more: 3%
- None in past 2 years: 26%

**What happened after appointment missed?**

- Rearranged for another day: 58%
- Engineer turned up later that day: 20%
- Cancelled altogether: 12%
- Still waiting for re-arrangement: 4%
- Other: 6%

I2a Have you ever experienced a missed appointment regarding a landline and/or broadband service (i.e. where an engineer was scheduled to arrive at your home within a specified appointment window and did not turn up within that time)? This could be, for example, to install a new service or repair an existing service. Base: Total Sample n=2088. I2b Overall how many missed appointments have you experienced in the last two years? I3 What happened after the appointment was missed? I8 M9d How much time did you and other people in your household spend trying to get another appointment? (e.g. time spent on the phone with your provider). It should not include the time spent while waiting for the original missed appointment. Base: all that experienced a missed appointment n=72* **CAUTION LOW BASE**
On average, consumers spent 2 hours waiting for their engineer to arrive. The waiting meant that 3 in 5 couldn’t do other things and it made 2 in 5 feel anxious. Only 1 in 3 were able to spend less than an hour rearranging their next appointment.

**Experience of a missed appointment**

**Ever experienced?**

![Pie Chart](image)

4%

**Time spent waiting for engineer to arrive**

<table>
<thead>
<tr>
<th>Time Duration</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-6 hours</td>
<td>36%</td>
</tr>
<tr>
<td>6-12 hours</td>
<td>13%</td>
</tr>
<tr>
<td>1 day (24 hours)</td>
<td>19%</td>
</tr>
<tr>
<td>2 days or more</td>
<td>19%</td>
</tr>
<tr>
<td>Did not spend any</td>
<td>6%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>5%</td>
</tr>
</tbody>
</table>

Mean: 1.8 days

Median 0.3

**Which applied to most recent missed appointment?**

<table>
<thead>
<tr>
<th>Applying</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Waiting meant not doing other</td>
<td>57%</td>
</tr>
<tr>
<td>Increased anxiety &amp; stress</td>
<td>41%</td>
</tr>
<tr>
<td>Took time to re-arrange</td>
<td>30%</td>
</tr>
<tr>
<td>Had to take paid leave/holiday</td>
<td>14%</td>
</tr>
<tr>
<td>Unpaid time off work</td>
<td>12%</td>
</tr>
<tr>
<td>Paid for engineer to fix</td>
<td>5%</td>
</tr>
<tr>
<td>Not affected</td>
<td>14%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>3%</td>
</tr>
</tbody>
</table>

**Time spent trying to get another appointment**

<table>
<thead>
<tr>
<th>Time Duration</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt; one hour</td>
<td>33%</td>
</tr>
<tr>
<td>1-3 hours</td>
<td>22%</td>
</tr>
<tr>
<td>3-8 hours</td>
<td>10%</td>
</tr>
<tr>
<td>More than 8 hours</td>
<td>8%</td>
</tr>
<tr>
<td>Did not spend any</td>
<td>18%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>9%</td>
</tr>
</tbody>
</table>

Mean: 2.8 hours

Median 0.5

Mean amongst those saying less than 1 day: 0.2 days (median 0.2 days)

Mean amongst those saying less 8 hours: 1.0 (median 0.5)
Three quarters (73%) contacted their provider to re-arrange the appointment. All used the phone. Only 2 in 5 (43%) needed to contact their provider once.

Experience of a missed appointment

Actions taken by you/household to re-arrange

- Contacted provider: 73%
- Assumed provider would contact: 12%
- Used other company to fix: 7%
- Checked provider website: 5%
- Other: 5%
- Nothing: 14%

How contacted?

- Phone: 100%
- Webchat: 2%
- Email: 2%
- Other: 3%

How many times contacted provider?

- Once: 43%
- Twice: 21%
- 3 times: 11%
- 4 times: 8%
- 5 times: 7%
- 6+ times: 11%

I9a How did you contact your provider? I9b How many times did you contact your provider? I9a M12 How did you contact your provider? I9b M13 How many times did you contact your provider? Base: All that contacted the provider n=53* CAUTION LOW BASE
3 in 5 claim that the loss in working hours that resulted from the missed appointment had a negative impact on their household.

**Experience of a missed appointment**

**Impact of the missed appointment on household**

- **Loss of working hours**
  - 23%: 0 - no impact at all
  - 9%: 1
  - 9%: 2
  - 34%: 3
  - 13%: 4
  - 12%: 5 - very great impact
  - 60% of respondents

- **General impact on household**
  - 12%: 0 - no impact at all
  - 9%: 1
  - 13%: 2
  - 33%: 3
  - 12%: 4
  - 21%: 5 - very great impact
  - 66% of respondents

**Note:** How much of an impact did this loss of working hours have on your household? Please use a scale of 0 to 5 where 0 denotes “No impact at all” and 5 denotes “Very great impact”. How much of an impact did this have on you and your household? Please use a scale of 0 to 5 where 0 denotes “No impact at all” and 5 denotes “Very great impact”. Base: all that experienced a missed appointment n=72* **CAUTION LOW BASE**
Overall, only 8% received compensation for their missed appointment

**Missed appointment compensation**

- **NET compensation received**: 8%
  - Asked & received: 4%
  - Not asked but received: 15%
  - Asked & NOT received: 73%
  - NOT asked, NOT received: 4%
  - Don’t know: 4%

*I12a Did you receive any compensation from your provider for this missed appointment? I12b/c Did you ask for compensation or was it offered by the provider/did you ask for compensation. Base: all that experienced a missed appointment n=72* CAUTION LOW BASE*
Only 8% had received compensation for their missed appointment. The vast majority did not ask for compensation - key reasons being a lack of expectation, a belief that it wouldn’t be worth it and a lack of knowledge about how to do it.

Experience of a missed appointment

Received compensation for missed appointment?

- **YES** 8%
- **NO** 92%

**Asked for compensation?**

- **Asked** 16%
- **Did not ask** 79%
- **Don't know** 4%

**Why not ask?**

- Didn’t expect to get: 37%
- Not worth it: 28%
- Didn’t know how: 26%
- Not providers fault: 7%
- Forgot: 1%
- Other: 17%

I12a M16 Did you receive any compensation from your provider for this missed appointment? Base: all with missed appointment n=72*

I12bi Did you ask for compensation in regards to the missed appointment? We are referring to you proactively asking for compensation rather than simply notifying your provider of the missed appointment. Base: all who did not receive compensation n=65*

I12c M18a Why did you not ask for compensation? Base: all who did not get or ask for compensation n=52*.

*CAUTION LOW BASE
41% of consumers expect to be compensated for a missed appointment. On average, they would expect approximately £50 - to be paid as a credit on their account or in cash.

**Hypothetical missed appointment**

**Expect to be compensated for a missed appointment?**

<table>
<thead>
<tr>
<th>Amount</th>
<th>Expect Compensation</th>
</tr>
</thead>
<tbody>
<tr>
<td>£11-25</td>
<td>9%</td>
</tr>
<tr>
<td>£26-50</td>
<td>11%</td>
</tr>
<tr>
<td>£51-100</td>
<td>9%</td>
</tr>
<tr>
<td>£101-200</td>
<td>6%</td>
</tr>
<tr>
<td>£201+</td>
<td>1%</td>
</tr>
<tr>
<td>&lt;£10</td>
<td>4%</td>
</tr>
</tbody>
</table>

Mean: £52

**Would expect but not sure how much**

<table>
<thead>
<tr>
<th>Amount</th>
<th>Expect Compensation</th>
</tr>
</thead>
<tbody>
<tr>
<td>£11-25</td>
<td>9%</td>
</tr>
<tr>
<td>£26-50</td>
<td>11%</td>
</tr>
<tr>
<td>£51-100</td>
<td>9%</td>
</tr>
<tr>
<td>£101-200</td>
<td>6%</td>
</tr>
<tr>
<td>£201+</td>
<td>1%</td>
</tr>
<tr>
<td>&lt;£10</td>
<td>4%</td>
</tr>
</tbody>
</table>

Mean: £80

**Form would expect compensation to take**

<table>
<thead>
<tr>
<th>Form</th>
<th>Expect Compensation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credit on account</td>
<td>62%</td>
</tr>
<tr>
<td>Cash</td>
<td>31%</td>
</tr>
<tr>
<td>Future discounts/reductions</td>
<td>5%</td>
</tr>
<tr>
<td>Free service upgrade</td>
<td>2%</td>
</tr>
</tbody>
</table>

**Why not expect to receive compensation?**

<table>
<thead>
<tr>
<th>Reason</th>
<th>Expect Compensation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Just don't expect it</td>
<td>19%</td>
</tr>
<tr>
<td>Just one of those things</td>
<td>13%</td>
</tr>
<tr>
<td>No great loss/inconvenience</td>
<td>11%</td>
</tr>
<tr>
<td>Didn't know how</td>
<td>11%</td>
</tr>
<tr>
<td>Not a problem</td>
<td>8%</td>
</tr>
<tr>
<td>Depends on circumstances</td>
<td>6%</td>
</tr>
<tr>
<td>Don't do that sort of thing</td>
<td>5%</td>
</tr>
<tr>
<td>Too much hassle</td>
<td>4%</td>
</tr>
<tr>
<td>Quickly resolved</td>
<td>2%</td>
</tr>
<tr>
<td>Other</td>
<td>9%</td>
</tr>
<tr>
<td>Don't know</td>
<td>16%</td>
</tr>
</tbody>
</table>

I13a I’d like you to imagine a situation where you had been given an appointment time by your supplier for an engineer to visit your home to install, repair or upgrade one of your services and the engineer did not turn up at all. Would you expect to be compensated for this missed appointment? and if so, how much? Base: all consumer that have NOT experienced a missed appointment n=2016

I13b M23 Why would you not expect to receive any compensation for the missed appointment? Base: all not expecting compensation n=733

I12c M24 What form would you expect that compensation to take? Base: all expecting compensation and giving an amount n=819
Automatic compensation:
Consumer experience of provisioning delays, loss of service and missed appointments

Fixed Line Research:
SMEs
More than half say their business would struggle to cope without fixed broadband and landline. However, the importance of landline is linked to its role in providing broadband.
- Larger SMEs (10+ emps) are more reliant upon broadband and landline services

Price dominates as the influencing factor in provider choice.
- Larger SMEs are more likely to cite broadband speed

3 in 5 (59%) have switched any fixed line service in the past 5 years.
- 27% have switched both, 18% broadband (only) and 14% landline (only)

39% have experienced a complete loss of fixed line service.
- On average, the LoS lasted c5 days (c3 days for larger SMEs)

89% reported their LoS to their provider (96% of larger SMEs). They waited 5 hours before reporting it and service was restored after 5.3 days (3.4 days for Larger SMEs)

Half (48%) are satisfied with their providers ability to resolve their LoS. SMEs also become increasingly dissatisfied after waiting 3 days for their restoration.
- <1day = 74% satisfied, 1-3 days = 49% satisfied, 4+ days = 12% satisfied

Three fifths (61%) felt their LoS had a negative impact on their business generally (73% respectively for Larger SMEs)

The LoS prevented people working in 2 in 5 businesses. On average, 26 working hours were lost in these businesses.
Fixed line research: SME executive summary (2)

- 11% received compensation for their LoS, with 6% asking for it. Of those that did not receive compensation, 10% asked for it and 89% did not (2% didn’t know).

- After probing, 39% expect to be compensated for the impact of their LoS. On average, they expect c£160 (c330 for larger SMEs) - to be paid as an account credit or cash.

- 1 in 20 (6%) changed supplier as a direct result of their LoS. 1 in 7 looked into it, but stayed as they were within their minimum contact period (14%) and 1 in 10 looked into it, stayed for other reasons (9%).

- On average, 1 days notice is ‘reasonable’ for a change to an engineer appointment.

- 7% have ever experienced a missed appointment (18% of larger SMEs), with 6% doing so in the last 2 years.
  - Affected SMEs spend 9 hrs waiting for an engineer.
    - This negatively affects 94%.
    - They spend 5½ hrs trying to set up another appt (2 hrs for larger SMEs).
    - Almost all use the phone channel and, on average, they make contact 3 times.
    - These SMEs lose c12 working hrs as a result of their missed appt(s).

- Only 4% received compensation for their missed appt, with 2% asking for it. Of those that did not receive compensation, 15% asked for it and 85% did not.

- After probing, 59% of SMEs expect to be compensated. On average, they expect c£45 (larger SMEs expect c£190), to be paid as a credit on their account or cash.
Key sample criteria: Firmographics

**Industry sector and Company size**

### Industry group
- Primary: 19%
- Services: 34%
- Retail/W’sale: 32%
- Govt: 9%
- Third sector: 6%

### Sector detail
- Agriculture, forestry, fishing: 6%
- Manufacturing: 8%
- Construction: 5%
- Retail/wholesale: 32%
- Professional, scientific, tech: 13%
- Accommodation, food service: 4%
- Information, communication: 5%
- Arts, entertainment, rec: 2%
- Transportation, storage: 2%
- Financial, insurance: 1%
- Real estate: 1%
- Admin, support service: 0%
- Other service: 5%
- Human health, social work: 5%
- Education: 3%
- Third sector: 9%

### UK company turnover
- < £50k: 31%
- £50k-£100k: 24%
- Over £100k-£250k: 19%
- Over £250k-£500k: 10%
- Over £500k-£1m: 4%
- Over £1m-£5m: 3%
- Over £5m: 1%
- Don’t know/ref: 9%

### Number of employees (Including self)
- 1: 36%
- 2: 29%
- 3-4: 26%
- 5-9: 5%
- 10-19: 2%
- 20-49: 2%
- 50-99: 0%
- 100-249: 0%

### Number of UK sites/offices
- 1: 94%
- 2: 5%
- 3+: 1%

F4 into which of the following bands does the company turnover in the UK fall? B1 How many employees (including yourself) are there in the company in the UK, including both fulltime and part time workers? B2b. How many sites or offices does your organisation operate from in the UK, including this one? B4a SIC code (from sample) Base: All SME n=1006
Key sample criteria: Country/region, urbanity and job title

### Location

<table>
<thead>
<tr>
<th>Region</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>England</td>
<td>88%</td>
</tr>
<tr>
<td>South West</td>
<td>12%</td>
</tr>
<tr>
<td>South East</td>
<td>16%</td>
</tr>
<tr>
<td>West Midlands</td>
<td>8%</td>
</tr>
<tr>
<td>East of England</td>
<td>11%</td>
</tr>
<tr>
<td>North East</td>
<td>5%</td>
</tr>
<tr>
<td>East Midlands</td>
<td>7%</td>
</tr>
<tr>
<td>London</td>
<td>13%</td>
</tr>
<tr>
<td>North West</td>
<td>9%</td>
</tr>
<tr>
<td>Yorkshire and the Humber</td>
<td>7%</td>
</tr>
<tr>
<td>Scotland</td>
<td>6%</td>
</tr>
<tr>
<td>Wales</td>
<td>4%</td>
</tr>
<tr>
<td>Northern Ireland</td>
<td>2%</td>
</tr>
</tbody>
</table>

### Urbanity

<table>
<thead>
<tr>
<th>Urbaneity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Urban</td>
<td>73%</td>
</tr>
<tr>
<td>Large city</td>
<td>15%</td>
</tr>
<tr>
<td>Smaller city/large town</td>
<td>14%</td>
</tr>
<tr>
<td>Medium town</td>
<td>27%</td>
</tr>
<tr>
<td>Small town</td>
<td>17%</td>
</tr>
<tr>
<td>Rural</td>
<td>27%</td>
</tr>
<tr>
<td>Rural, nr urban</td>
<td>22%</td>
</tr>
<tr>
<td>Remote rural</td>
<td>5%</td>
</tr>
</tbody>
</table>

### Job Title

<table>
<thead>
<tr>
<th>Job Title</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Owner / Proprietor</td>
<td>57%</td>
</tr>
<tr>
<td>Managing Director</td>
<td>18%</td>
</tr>
<tr>
<td>Partner / Managing Partner</td>
<td>1%</td>
</tr>
<tr>
<td>Senior Manager (NET)</td>
<td>5%</td>
</tr>
<tr>
<td>PA / Office manager</td>
<td>2%</td>
</tr>
<tr>
<td>Company secretary</td>
<td>2%</td>
</tr>
<tr>
<td>IT/Telecoms director</td>
<td>1%</td>
</tr>
<tr>
<td>Other director</td>
<td>5%</td>
</tr>
<tr>
<td>Other</td>
<td>9%</td>
</tr>
</tbody>
</table>

B4b Urbaneity (from sample), Region (from sample). B3a What is your job title?
Base: All SME n=1006
75% of landline and 70% of broadband are business contracts (significantly higher in larger SMEs). Around half of these contracts contain SLAs and around a fifth specific compensation/refund arrangements (again, both higher in larger SMEs)

### Business Contracts

**Proportion which are BUSINESS contracts**

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>Don’t know</th>
<th>1-9 employees</th>
<th>1-9 employees</th>
<th>10-249 employees</th>
<th>10-249 employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>75%</td>
<td>1%</td>
<td>74%</td>
<td>74%</td>
<td>96%</td>
<td>96%</td>
</tr>
<tr>
<td>1-9 employees</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10-249 employees</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Contract contains specifically agreed SLA**

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>Don’t know</th>
<th>1-9 employees</th>
<th>1-9 employees</th>
<th>10-249 employees</th>
<th>10-249 employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>57%</td>
<td>28%</td>
<td>56%</td>
<td>56%</td>
<td>73%</td>
<td>73%</td>
</tr>
<tr>
<td>1-9 employees</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10-249 employees</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Contract specifies compensation and/or refund arrangements if certain quality service levels not met**

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>Don’t know</th>
<th>1-9 employees</th>
<th>1-9 employees</th>
<th>10-249 employees</th>
<th>10-249 employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>23%</td>
<td>49%</td>
<td>22%</td>
<td>22%</td>
<td>33%</td>
<td>33%</td>
</tr>
<tr>
<td>1-9 employees</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10-249 employees</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

B8A Does your company have a specific business contract for your landline service or do you just have an ordinary residential contract? Base: all with landline n=957, 1-9 employees n=624, 10-249 employees n=333. B8C Does the contract contain specifically agreed levels of service quality (a Service Level Agreement), for example an agreement to repair faults within a certain time frame? B8D Does the contract specify compensation and/or refund arrangements if certain quality service levels are not met? Base: all with landline business contract n=816, 1-9 employees n=491, 10-249 employees n=325. B11A Does your company have a specific business contract for your broadband service or do you just have an ordinary residential contract? Base: all with broadband n=873, 1-9 employees n=544, 10-249 employees n=329. B11C Does the contract contain specifically agreed levels of service quality (a Service Level Agreement), for example an agreement to repair faults within a certain time frame? B11D Does the contract specify compensation and/or refund arrangements if certain quality service levels are not met? Base: all with broadband business contract n=724, 1-9 employees n=408, 10-249 employees n=316.
58% of SMEs buy any communications services in a bundled package. This is likely to be a bundle of landline and broadband.

Bundling of services

Any services bundled together from the same supplier?

- Yes: 58%
- No: 29%
- N/a*: 13%

*Only one service used

Almost all those bundling have one bundle with one supplier (98%). 2% have two bundles.

45% of 10-249 SMEs do NOT bundle

6% of all with bundle

92% of all with bundle

1% of all with bundle

100% Fixed landline

99% Broadband internet

8% Mobile phone

B15 Do you buy any of your communications services together in one bundled package from the same provider? Base: all SME n=1006

B16 How many different providers do you have bundled services with? B17 And which of these services are supplied as a bundle package? Base: all SME who bundle n=538
Average bundle spend is £80 per month

### Monthly spend on telecoms services

<table>
<thead>
<tr>
<th>Mean</th>
<th>£39.50</th>
<th>£44.20</th>
<th>£45.70</th>
<th>£54.40</th>
<th>£80.10</th>
</tr>
</thead>
<tbody>
<tr>
<td>£50+</td>
<td>12%</td>
<td>10%</td>
<td>15%</td>
<td>25%</td>
<td>25%</td>
</tr>
<tr>
<td>£31-50</td>
<td>15%</td>
<td>15%</td>
<td>20%</td>
<td>20%</td>
<td>34%</td>
</tr>
<tr>
<td>£21-30</td>
<td>14%</td>
<td>15%</td>
<td>13%</td>
<td>13%</td>
<td>34%</td>
</tr>
<tr>
<td>£11-20</td>
<td>19%</td>
<td>15%</td>
<td>20%</td>
<td>24%</td>
<td>34%</td>
</tr>
<tr>
<td>&lt;£10</td>
<td>32%</td>
<td>28%</td>
<td>20%</td>
<td>15%</td>
<td>13%</td>
</tr>
<tr>
<td>Nothing</td>
<td>20%</td>
<td>12%</td>
<td>3%</td>
<td>15%</td>
<td>0%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Don’t know/Ref</th>
<th>£50+</th>
<th>£31-50</th>
<th>£21-30</th>
<th>£11-20</th>
<th>&lt;£10</th>
</tr>
</thead>
<tbody>
<tr>
<td>LL/BB Line Rental</td>
<td>5%</td>
<td>12%</td>
<td>12%</td>
<td>12%</td>
<td>12%</td>
<td>12%</td>
</tr>
<tr>
<td>LL Calls</td>
<td>12%</td>
<td>12%</td>
<td>12%</td>
<td>12%</td>
<td>12%</td>
<td>12%</td>
</tr>
<tr>
<td>Fixed broadband</td>
<td>15%</td>
<td>27%</td>
<td>20%</td>
<td>13%</td>
<td>12%</td>
<td>3%</td>
</tr>
<tr>
<td>Mobile phone</td>
<td>5%</td>
<td>3%</td>
<td>3%</td>
<td>15%</td>
<td>15%</td>
<td>0%</td>
</tr>
<tr>
<td>Typical bundle</td>
<td>1%</td>
<td>3%</td>
<td>3%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

B18/B19: Approximately how much do you pay for your landline/broadband/mobile/bundle per month? Base: All SME n=1006
As expected, total annual spend increases with size of SME. Average annual spend is £1,340.

### Total annual spend on telecoms services

<table>
<thead>
<tr>
<th>Mean</th>
<th>Overall spend</th>
<th>1-9 employees</th>
<th>10-249 employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>£1,337.90</td>
<td>13%</td>
<td>13%</td>
<td>22%</td>
</tr>
<tr>
<td>£1,118.30</td>
<td>2%</td>
<td>1%</td>
<td>16%</td>
</tr>
<tr>
<td>£6,694.2</td>
<td>10%</td>
<td>9%</td>
<td>20%</td>
</tr>
</tbody>
</table>

- Don't know/Ref
- £5000-£9,000
- £2000-£4,999
- £1000-£1999
- £500-999
- <£500

B18/B19 Approximately how much do you pay for your landline/broadband/mobile/bundle per month? Base: all SME n=1006
Larger SMEs have more sophisticated services (e.g. ISDN, fibre/superfast, smartphones). Cable and fibre/superfast associated with urban areas.

### Communication services currently used

#### Business

<table>
<thead>
<tr>
<th>Service</th>
<th>1-9 (653)</th>
<th>10-249 (353)</th>
<th>Urban (741)</th>
<th>Rural (207)</th>
<th>Remote (58)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard PSTN landline telephone</td>
<td>90%</td>
<td>63%</td>
<td>88%</td>
<td>90%</td>
<td>86%</td>
</tr>
<tr>
<td>ISDN 2/2e</td>
<td>5%</td>
<td>31%</td>
<td>7%</td>
<td>6%</td>
<td>7%</td>
</tr>
<tr>
<td>ISDN 30</td>
<td>3%</td>
<td>31%</td>
<td>4%</td>
<td>3%</td>
<td>5%</td>
</tr>
<tr>
<td>Fixed broadband internet connection (NET)</td>
<td>80%</td>
<td>93%</td>
<td>81%</td>
<td>83%</td>
<td>77%</td>
</tr>
<tr>
<td>Copper/standard broadband (via fixed line)</td>
<td>56%</td>
<td>51%</td>
<td>53%</td>
<td>65%</td>
<td>64%</td>
</tr>
<tr>
<td>Cable broadband (usually provided by Virgin Media)</td>
<td>7%</td>
<td>4%</td>
<td>8%</td>
<td>2%</td>
<td>1%</td>
</tr>
<tr>
<td>Fibre/superfast broadband (via fixed line)</td>
<td>22%</td>
<td>43%</td>
<td>25%</td>
<td>17%</td>
<td>13%</td>
</tr>
<tr>
<td>MOBILES (NET)</td>
<td>55%</td>
<td>63%</td>
<td>51%</td>
<td>67%</td>
<td>53%</td>
</tr>
<tr>
<td>Smartphone</td>
<td>44%</td>
<td>57%</td>
<td>43%</td>
<td>50%</td>
<td>44%</td>
</tr>
<tr>
<td>Standard mobile phone</td>
<td>14%</td>
<td>17%</td>
<td>12%</td>
<td>22%</td>
<td>14%</td>
</tr>
<tr>
<td>Mobile broadband (via a USB modem/dongle)</td>
<td>7%</td>
<td>12%</td>
<td>7%</td>
<td>7%</td>
<td>5%</td>
</tr>
<tr>
<td>Other broadband (e.g. satellite, fixed wireless)</td>
<td>1%</td>
<td>3%</td>
<td>1%</td>
<td>3%</td>
<td>5%</td>
</tr>
<tr>
<td>Leased lines or private circuits</td>
<td>3%</td>
<td>12%</td>
<td>2%</td>
<td>5%</td>
<td>0%</td>
</tr>
<tr>
<td>Ethernet/symmetrical up/down connection</td>
<td>6%</td>
<td>19%</td>
<td>7%</td>
<td>5%</td>
<td>6%</td>
</tr>
</tbody>
</table>

S2 Which of the following do you have in your business?
Base: All SME n=1006
More than half feel their business would struggle to cope without fixed broadband or landline

Importance of telecoms services currently used

- **Landline telephone**
  - My business would not find day to day activity impeded without this service: 6%
  - My business would rather the service was available but could manage without it: 13%
  - My business could manage but only for a limited period without it: 28%
  - My business would struggle to function without it: 53%

- **Fixed Internet connection**
  - My business would not find day to day activity impeded without this service: 7%
  - My business would rather the service was available but could manage without it: 9%
  - My business could manage but only for a limited period without it: 25%
  - My business would struggle to function without it: 59%

- **Mobile phone**
  - My business would not find day to day activity impeded without this service: 11%
  - My business would rather the service was available but could manage without it: 17%
  - My business could manage but only for a limited period without it: 23%
  - My business would struggle to function without it: 48%

Mean # days business able to cope without service

- Landline telephone: 14.8 days
- Fixed Internet connection: 14.7 days
- Mobile phone: 20.3 days
Importance of landline to businesses is likely to be linked to its role in providing broadband rather than calls

Importance of telecoms services currently used

<table>
<thead>
<tr>
<th>Service Used</th>
<th>ANY Landline</th>
<th>Landline used ONLY for broadband</th>
<th>Landline used for CALLS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any service</td>
<td>6%</td>
<td>5%</td>
<td>6%</td>
</tr>
<tr>
<td>Landline used for broadband only</td>
<td>13%</td>
<td>5%</td>
<td>13%</td>
</tr>
<tr>
<td>Landline used for calls</td>
<td>28%</td>
<td>18%</td>
<td>29%</td>
</tr>
<tr>
<td>Landline used for broadband + calls</td>
<td>53%</td>
<td>71%</td>
<td>52%</td>
</tr>
</tbody>
</table>

- My business would not find day to day activity impeded without this service
- My business would rather the service was available but could manage without it
- My business could manage but only for a limited period without it
- My business would struggle to function without it

Mean # days business able to cope without service

- ANY Landline: 14.8 days
- Landline used ONLY for broadband: 4.1 days
- Landline used for CALLS: 15.1 days

D1 Thinking again about your [landline / broadband / Mobile phone] service, how much does your business rely on each of these?
Base: All SME using landline (total) n=957, used only for broadband n=232, used for calls n=889
Larger SMEs significantly more reliant upon broadband and landline services compared to smaller businesses. No difference in reliance upon mobiles.

**Level of reliance upon telecoms services currently used**

<table>
<thead>
<tr>
<th>Service</th>
<th>Total</th>
<th>1-9 employees</th>
<th>10-249 employees</th>
<th>1-9 employees</th>
<th>10-249 employees</th>
<th>1-9 employees</th>
<th>10-249 employees</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>High/medium</strong></td>
<td>81%</td>
<td>80%</td>
<td>93%</td>
<td>84%</td>
<td>96%</td>
<td>72%</td>
<td>72%</td>
</tr>
<tr>
<td><strong>Low</strong></td>
<td>19%</td>
<td>20%</td>
<td>7%</td>
<td>16%</td>
<td>4%</td>
<td>28%</td>
<td>28%</td>
</tr>
</tbody>
</table>

**High/medium**: My business would struggle to function without it/could manage but only for a limited period without it

**Low**: My business would rather the service was available but could manage without it / would not find day to day activity impeded without this service

D1: Thinking again about your [landline / broadband / Mobile phone] service, how much does your business rely on each of these?

Base: All SME using landline/broadband/mobile phone n=957/873/577
Internet likely to have been changed/upgraded more recently than landline for calls. Especially the case for larger SMEs

When last changed supplier or upgraded existing service

<table>
<thead>
<tr>
<th>Within last 5 years:</th>
<th>Landline used only for Broadband</th>
<th>Landline used for making &amp; receiving calls</th>
<th>Fixed Broadband Internet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Within last 2 years</td>
<td>61% (1-9 = 60%, 10-249 = 70%)</td>
<td>46% (1-9 = 46%, 10-249 = 51%)</td>
<td>54% (1-9 = 53%, 10-249 = 65%)</td>
</tr>
<tr>
<td>2-5 years ago</td>
<td>45%</td>
<td>30%</td>
<td>35%</td>
</tr>
<tr>
<td>5 to 10 years ago</td>
<td>16%</td>
<td>9%</td>
<td>18%</td>
</tr>
<tr>
<td>10 or more years ago</td>
<td>14%</td>
<td>11%</td>
<td>10%</td>
</tr>
<tr>
<td>Never/can’t remember</td>
<td>11%</td>
<td>34%</td>
<td>6%</td>
</tr>
</tbody>
</table>

When did you last change your (service) supplier or upgrade your existing service with the same supplier?

Base: All with LL used only for BB n=232 (1-9 n=114/10-249 =118), all with LL used for making/receiving calls n=889 (1-9 n=585/10-249 =304), all with fixed broadband internet n=873 (1-9 n=544/10-249 =329),
Price dominates as the influencing factor in provider choice. Larger SMEs (10-249 emps) less likely to cite this, and more likely to cite broadband speed

Main factors that influenced choice of provider (unprompted)

- Price: 59%
- Reliability: 23%
- Trusted brand: 20%
- Broadband speed: 15%
- Customer service: 11%
- Bundled with other services: 9%
- Only one available in area at time: 7%
- Responsiveness to faults: 3%
- Speed of installation: 1%
- Other: 3%
- Can’t remember: 4%

- Price: 51%
- Reliability: 25%
- Voice call coverage: 22%
- Data coverage: 17%
- Trusted brand: 13%
- Customer service: 8%
- Data allowance: 5%
- Bundled with other services: 5%
- Voice call quality: 5%
- Only one available in area at time: 2%
- Broadband speed: 1%
- Choice of handsets: 1%
- Responsiveness to faults: 0%
- Other: 5%
- Can’t remember: 3%

- Only 39% of 10+ SMEs cite price vs. 52% of 1-9
- 24% of 10+ SMEs cite broadband speed vs. only 15% of 1-9

- Only 14% of 10+ SMEs cite customer service vs. only 8% of 1-9

C2a/b/c. Thinking back to when you chose your (service), what were the main factors that influenced your choice of provider?

Base: All that have a landline but no fixed broadband and changed their provider in the last 10 years n=72, all that have a fixed broadband connection and changed their provider in the last 10 years n=635, all with a mobile service n=577
Section 3
Experience of and impact of loss of service/delayed provisioning
Almost 6 in 10 (59%) have switched any of landline or broadband in the past 5 years

Switching providers/services

- **All changed LL (only) in last 5 years**: 41%
- **All changed BB (only) in last 5 years**: 14%
- **Not changed LL or BB in past 5 years**: 27%

**Changed LL & BB in past 5 years**
- 84% changed both together
- 6% changed LL most recently
- 10% changed BB most recently

C1 When did you last change your supplier or upgrade your service with existing supplier? Base: All with LL used only for BB n=232, all with LL used for making/receiving calls n=889, all with fixed broadband internet n=873. E1a You said earlier that you have changed or upgraded your landline and broadband services in the last two/five years. Did you change both services at the same time to the same provider? Base: All that changed or upgraded their landline and broadband services in the last two/five years n=348. E1b Which service did you change or upgrade more recently? All that did not change both services at the same time n=74*
SMEs are most likely to change/upgrade with their existing provider

Scenario last time changed or upgraded service

- No existing service
- Change/upgrade existing provider, service maintained
- Change/upgrade existing provider, temporary loss service
- Switch to new provider, temporary loss service
- Switch to new provider, service maintained
- Switch to new provider, service loss due to own choices
- Other/DK

E2 Which of these scenarios applied to the last time you changed or upgraded your service?
Base: All that have changed landline/broadband/landline & broadband in the last 5 years 142/180/274
On average it takes 13 days to activate/upgrade a Landline (only). 82% said this was in line with provider information and 88% felt the time taken was reasonable.

**Scenario last time changed or upgraded service (Landline only)**

- No existing service: 9%
- Change/upgrade existing provider, service maintained: 53%
- Change/upgrade existing provider, temporary loss service: 6%
- Switch to new provider, temporary loss service: 2%
- Switch to new provider, service maintained: 34%
- Switch to new provider, service loss due to own choices: 2%
- Other/DK: 9%

**Service activation (days)**

- Mean (days): 13
- In line with time period given by provider: 82%
- Reasonable timing: 88%

**Of the 6 who said no, 1 said “1 day”, 3 said “2 days”, 2 said “7 days”,**
On average 16 days to service activation for Broadband only. 86% said this was in line with provider information and 83% felt the time taken was reasonable.

Scenario last time changed or upgraded service (Broadband only)

- No existing service
- Change/upgrade existing provider, service maintained
- Change/upgrade existing provider, temporary loss service
- Switch to new provider, temporary loss service
- Switch to new provider, service maintained
- Switch to new provider, service loss due to own choices
- Other/DK

E2 Which of these scenarios applied to the last time you changed or upgraded your service? Base: All that have changed broadband most recently in the last 5 years n=180
E3 Did you move premises at the same time? Base: All not ‘other/dk’ at E2 n=177. E4 Did the change or upgrade require the installation of new lines or other services? Base: All not ‘no existing service’ other/dk or lost service due to own actions at E2 n=157. E5 Approximately how many calendar days after placing the order was the service activated or upgraded? Base: all that had a new broadband service n=176 (not including other/dk or those without service due to own choices). E5b And was this in line with the time period you had been given by your provider? E6a Do you think the time it took was reasonable? Base: All where service activated n=176

Service activation (days)

- Zero: 0
- One: 3%
- Two: 2%
- Three: 2%
- Four: 1%
- Five: 7%
- Six: 2%
- Seven: 17%
- 8 to 10: 5%
- 11 to 14: 16%
- 15 to 21: 10%
- 22+ days: 22%
- Not yet: 0%
- Don’t know: 12%

Mean (days): 16

86% said the change required installation new lines or other services

83% said the change was in line with the time period given by provider

Of the 23 who said no, the average (mean) was 5 days to be reasonable
It takes 15 days for combined Landline & Broadband to be activated. 84% said this was in line with provider information and 82% felt the time taken was reasonable.

Scenario last time changed or upgraded service (LL&BB together)

- No existing service: 5%
- Change/upgrade existing provider, service maintained: 46%
- Change/upgrade existing provider, temporary loss service: 10%
- Switch to new provider, temporary loss service: 6%
- Switch to new provider, service maintained: 9%
- Switch to new provider, service loss due to own choices: 31%
- Other/DK: 9%

Service activation (days)

- Mean (days): 15
- In line with time period given by provider: 84%
- Reasonable timing: 82%

Of the 6 who said no, 1 said “1 day”, 3 said “2 days”, 2 said “7 days”,

E2 Which of these scenarios applied to the last time you changed or upgraded your service? Base: All that have changed landline & broadband together in the last 5 years n=274. E3 Did you move premises at the same time? Base: All not ‘other/dk’ at E2 n=266. E4 Did the change or upgrade require an engineer to visit your home to install new lines or other equipment? Base: All not ‘no existing service’ other/dk or lost service due to own actions at E2 n=246. E5 Approximately how many calendar days after placing the order was the service activated or upgraded? Base: All that had a new landline & broadband service n=264 (not including other/dk or those without service due to own choices). E5b And was this in line with the time period you had been given by your provider? E6a Do you think the time it took was reasonable? Base: All where service activated n=261
6% of our sample had experienced loss of service (during provisioning or upgrading for any of LL, BB or LL&BB). On average this loss was 24 days.

Experience of loss of service due to provisioning or upgrading (any service) - how long without the service?

<table>
<thead>
<tr>
<th>Duration</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt; one hour</td>
<td>24%</td>
</tr>
<tr>
<td>1-6 hours</td>
<td>8%</td>
</tr>
<tr>
<td>6-24 hours</td>
<td>1%</td>
</tr>
<tr>
<td>1 day</td>
<td>7%</td>
</tr>
<tr>
<td>2 days</td>
<td>5%</td>
</tr>
<tr>
<td>3-5 days</td>
<td>18%</td>
</tr>
<tr>
<td>6-10 days</td>
<td>10%</td>
</tr>
<tr>
<td>11-20 days</td>
<td>7%</td>
</tr>
<tr>
<td>21-50 days</td>
<td>13%</td>
</tr>
<tr>
<td>Over 50 days</td>
<td>7%</td>
</tr>
<tr>
<td>Don't know</td>
<td>10%</td>
</tr>
</tbody>
</table>

Mean amongst those saying less than 365 days: 10.7 days

Base sizes too low to analyse by specific services

E8 You said earlier that you experienced a temporary service loss when ordering a new service or upgrading. How long were you without service during the changeover period? Base: all that experienced a loss of service due to provisioning or upgrading n=74 *CAUTION LOW BASE
Amongst switchers, just over a week on average would be considered a reasonable activation time if a business didn’t have an existing service.

(Amongst switchers in past 5 years): If didn’t have service at all, what would be reasonable activation time?

Mean (days)

<table>
<thead>
<tr>
<th>Days</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zero</td>
<td>0%</td>
</tr>
<tr>
<td>One</td>
<td>8%</td>
</tr>
<tr>
<td>Two</td>
<td>15%</td>
</tr>
<tr>
<td>Three</td>
<td>12%</td>
</tr>
<tr>
<td>Four</td>
<td>3%</td>
</tr>
<tr>
<td>Five</td>
<td>10%</td>
</tr>
<tr>
<td>Six</td>
<td>0%</td>
</tr>
<tr>
<td>Seven</td>
<td>25%</td>
</tr>
<tr>
<td>8 to 10</td>
<td>6%</td>
</tr>
<tr>
<td>11 to 14</td>
<td>13%</td>
</tr>
<tr>
<td>15 to 21</td>
<td>0%</td>
</tr>
<tr>
<td>22+ days</td>
<td>6%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>3%</td>
</tr>
</tbody>
</table>

Mean (days)

<table>
<thead>
<tr>
<th>Days</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zero</td>
<td>4%</td>
</tr>
<tr>
<td>One</td>
<td>9%</td>
</tr>
<tr>
<td>Two</td>
<td>8%</td>
</tr>
<tr>
<td>Three</td>
<td>10%</td>
</tr>
<tr>
<td>Four</td>
<td>2%</td>
</tr>
<tr>
<td>Five</td>
<td>14%</td>
</tr>
<tr>
<td>Six</td>
<td>0%</td>
</tr>
<tr>
<td>Seven</td>
<td>27%</td>
</tr>
<tr>
<td>8 to 10</td>
<td>5%</td>
</tr>
<tr>
<td>11 to 14</td>
<td>15%</td>
</tr>
<tr>
<td>15 to 21</td>
<td>4%</td>
</tr>
<tr>
<td>22+ days</td>
<td>3%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>0%</td>
</tr>
</tbody>
</table>

Mean (days)

<table>
<thead>
<tr>
<th>Days</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zero</td>
<td>0%</td>
</tr>
<tr>
<td>One</td>
<td>6%</td>
</tr>
<tr>
<td>Two</td>
<td>10%</td>
</tr>
<tr>
<td>Three</td>
<td>8%</td>
</tr>
<tr>
<td>Four</td>
<td>4%</td>
</tr>
<tr>
<td>Five</td>
<td>20%</td>
</tr>
<tr>
<td>Six</td>
<td>0%</td>
</tr>
<tr>
<td>Seven</td>
<td>28%</td>
</tr>
<tr>
<td>8 to 10</td>
<td>3%</td>
</tr>
<tr>
<td>11 to 14</td>
<td>17%</td>
</tr>
<tr>
<td>15 to 21</td>
<td>0%</td>
</tr>
<tr>
<td>22+ days</td>
<td>4%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>0%</td>
</tr>
</tbody>
</table>

E7 I’d like you to imagine that you did not have (service) at all and had placed an order to have the service installed. How many days would you consider it reasonable to wait for it to be activated? Base: all who had switched landline/broadband/both most recently in past 5 years and had existing landline service n=134, broadband n=160, landline & broadband n=256.
Amongst all with the service, on average 6 days would be acceptable for landline activation; slightly longer for broadband (7 days)

If didn’t have service at all, what would be reasonable activation time?

G16 I’d like you to imagine that you did not have (service) at all and had placed an order to have the service installed. How many days would you consider it reasonable to wait for it to be activated? Base: all with a landline n=957, all with broadband n=873
Almost two-fifths (39%) have ever experienced a complete loss of service for more than one hour. Larger SMEs are more likely to have experienced this.

Experience of loss of service

E9a Over the last 2 years, have you experienced a complete loss of service for more than one hour for the following services taken by your business? By loss of service, we mean complete inability to make or receive voice calls or to access the internet. Please don’t include instances when your connection speed was slower than usual, but do include those that occurred as a result of a fault on your existing service. E9b Did you lose your landline and your broadband service at the same time? E9c Which service did you lose most recently? E9d When you lost your landline service did you also lose your broadband at the same time? E9e When you lost your broadband service did you also lose your landline at the same time? Base: Total Sample with landline or broadband n=991
Overall, 42% of SMEs had experienced any loss or delay with regard to telecommunications services. The vast majority of these were related to loss of existing services due to a fault, rather than issues with provisioning/upgrading.

% incidence in each group within the SME population

- **Any loss/delay 42%**
  - New service Delayed Provisioning n=9
  - Delayed Provisioning n=24

- **NO loss/delay 58%**
  - Did not have existing service at property. Provisioning NOT within time-scale given
  - Provisioning NOT within time-scale given

- **Loss of existing service 39%**
  - Loss of service due to a fault n=420

- **Loss of service during provisioning or upgrading 6%**
  - Loss of service due to provisioning or upgrading n=20

**PRIORITY GROUP DEFINITIONS.** Base: All SME with a fixed line (LL, BB or LL&BB) not mobile only n=991
Loss of service clearly very variable, but on average lasted around 4 days for broadband (only), rising to almost a week for any landline.

How long experienced loss of service for?

Mean (days) Any loss (total) Mean (days) Any landline

| < one hour | 4% | 3% | 4% |
| 1-6 hours | 25% | 36% | 19% |
| 6-23 hours | 7% | 4% | 9% |
| 1 day | 13% | 15% | 12% |
| 2 days | 15% | 16% | 15% |
| 3-5 days | 14% | 12% | 15% |
| 6-10 days | 5% | 1% | 8% |
| 11-20 days | 5% | 2% | 7% |
| 21+ days | 6% | 3% | 8% |
| Unresolved | 2% | 2% | 2% |
| Don’t know | 2% | 3% | 1% |

Any

landline

Total n=420, any landline n=259, broadband only n=161

Thinking about the most recent loss of your (service) due to a fault on your (service) how long did you experience a loss of service for? Base: All that experienced a loss of service
Larger SMEs likely to have experienced their loss of service over a shorter time frame

How long experienced loss of service for (any service)?

Mean (days) | Total
---|---
< one hour | 4% | 25%
1-6 hours | 7% | 13%
6-23 hours | 14% | 15%
1 day | 13% | 6-10 days | 5%
2 days | 15% | 11-20 days | 6%
3-5 days | 14% | 21+ days | 6%
6-10 days | 5% | Unresolved | 2%
11-20 days | 5% | Don't know | 2%
21+ days | 6% | 1-9 employees

Mean (days) | 5.3
---|---
< one hour | 4%
1-6 hours | 9%
6-23 hours | 13%
1 day | 13%
2 days | 15%
3-5 days | 14%
6-10 days | 6%
11-20 days | 5%
21+ days | 6%
Unresolved | 2%
Don't know | 2%

Mean (days) | 3.2
---|---
< one hour | 2%
1-6 hours | 4%
6-23 hours | 5%
1 day | 11%
2 days | 11%
3-5 days | 16%
6-10 days | 5%
11-20 days | 2%
21+ days | 4%
Unresolved | 2%
Don't know | 0%

F1 Thinking about the most recent loss of your (service) due to a fault on your (service) how long did you experience a loss of service for? Base: All that experienced a loss of service Total n=420, 1-9 n=251, 10-249 n=169
On average, almost 9 in 10 reported to provider (96% of larger SMEs). Of these, almost three-quarters made contact within the hour - almost all via telephone, half just once. A quarter had a recurring fault.

Experience of loss of service (any service)

**Reported to provider?**

<table>
<thead>
<tr>
<th>Total</th>
<th>1-9</th>
<th>10-249</th>
</tr>
</thead>
<tbody>
<tr>
<td>89%</td>
<td>88%</td>
<td>96%</td>
</tr>
</tbody>
</table>

- **Phone**: 91% (89% 89%)  
- **Email**: 4% (4% 5%)  
- **Webchat**: 3% (3% 3%)  
- **Other**: 7% (7% 8%)

**What happened when reported?**

- **Fixed first time reported**: 62% (67%)  
- **Same fault again after repair**: 24% (20%)  
- **Provider fixed without reporting**: 4% (3%)  
- **Other**: 2% (3%)

**How long wait after loss/expectation before contacting provider?**

- < one hour: 0%  
- 1-6 hours: 18% (27%)  
- 6-23 hours: 3% (8%)  
- 1 day: 5% (16%)  
- 1-2 days: 1% (11%)  
- 3-5 days: 1% (10%)  
- 6+ days: 1% (17%)  
- Don't know: 1%

**Mean: 0.2 days**

**Time taken to restore**

- Wait before contact
- Fixed first time restored

**Mean: 5.3 days**

**Why NOT reported?**

- Of the 32 who did not report, 8 looked at providers website for updates, 5 said it was fixed before they had time to report, 6 didn’t think it would last very long.

**F2a** Did you report your Landline/Broadband/Landline & Broadband loss of service?**

**F2c** How long after you (lost service/expected service to be installed/upgraded) did you contact the provider to let them know?**

**F2d** How did you contact your provider?**

**F2e** How many times did you contact your provider?**

**F5** How long did it take for your service to be restored after you first notified your provider of the issue?**

**F4** Which of the following best matches what happened when you reported the loss of service? **BASE: all who reported n=388, 1-9 employees n=226, 10-249 n=162**
Businesses experiencing any LL loss were more likely to report it to their provider. On average, broadband (only) faults were restored more quickly (within c3 days)

### Experience of loss of service (any service)

<table>
<thead>
<tr>
<th>Report to provider?</th>
<th>Total loss</th>
<th>BB only</th>
<th>Any LL</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>89%</td>
<td>84%</td>
<td>91%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Method</th>
<th>Total</th>
<th>BB only</th>
<th>Any LL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone</td>
<td>91%</td>
<td>91%</td>
<td>88%</td>
</tr>
<tr>
<td>Email</td>
<td>1%</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>Webchat</td>
<td>3%</td>
<td>5%</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>7%</td>
<td>0%</td>
<td>11%</td>
</tr>
</tbody>
</table>

| Contacted once  | 51%   | 48%     | 53%    |
| 2-3 times       | 22%   | 21%     | 24%    |
| 4 or more times | 26%   | 23%     | 19%    |

<table>
<thead>
<tr>
<th>How many times?</th>
<th>Total</th>
<th>BB only</th>
<th>Any LL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Don't know</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
</tr>
</tbody>
</table>

**What happened when reported?**

<table>
<thead>
<tr>
<th>Event</th>
<th>Total</th>
<th>BB only</th>
<th>Any LL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fixed first time</td>
<td>62%</td>
<td>62%</td>
<td>62%</td>
</tr>
<tr>
<td>Same fault again after</td>
<td>24%</td>
<td>29%</td>
<td>24%</td>
</tr>
<tr>
<td>Provider fixed without</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Other events</th>
<th>Total</th>
<th>BB only</th>
<th>Any LL</th>
</tr>
</thead>
<tbody>
<tr>
<td>3%</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
</tr>
</tbody>
</table>

### Why NOT reported?

**NO** 11%

Of the 32 who did not report, 8 looked at providers website for updates, 5 said it was fixed before they had time to report, 6 didn’t think it would last very long

---

F2a Did you report your Landline/Broadband/Landline & Broadband loss of service? Base: ANY SERVICE: loss of service n=420, broadband only n=161, any landline n=169. F2c How long after you (lost service/expected service to be installed/upgraded) did you contact the provider to let them know? F2d How did you contact your provider? F2e How many times did you contact your provider? F5 How long did it take for your service to be restored after you first notified your provider of the issue? F4 Which of the following best matches what happened when you reported the loss of service? BASE: all who reported n=388, broadband only n=143, any landline n=245

---

**Mean:** 0.2 days

Mean: 5.3 days

BB only 2.9 days

Any LL 6.3 days
SMEs become increasingly dissatisfied with their provider’s ability to resolve the issue as the length of time to resolve increases

Satisfaction with provider ability to resolve loss of service x by how long did it took for your service to be restored after first notifying the provider

F6 Overall, how satisfied or dissatisfied were you with the length of time it took your provider to resolve your loss of service for your (service), using the following scale? Base: All with a complete loss of service. Total n=420, F5 How long did it take for your service to be restored after you first notified your provider of the issue? BASE: all who reported n=388, all where service restored within 1 day n=164, 1-3 days n=131, more than 3 days n=77* 

*CAUTION LOW BASE
Overall around half are satisfied with the length of time their provider took to resolve their loss of service (slightly lower satisfaction if business had lost their landline – either on it’s own or with broadband).

Satisfaction with provider ability to resolve loss of service

<table>
<thead>
<tr>
<th>Total “satisfied”</th>
<th>Very satisfied</th>
<th>Fairly satisfied</th>
<th>Neither/nor</th>
<th>Fairly dissatisfied</th>
<th>Very dissatisfied</th>
<th>DK/NA</th>
</tr>
</thead>
<tbody>
<tr>
<td>48%</td>
<td>19%</td>
<td>29%</td>
<td>15%</td>
<td>11%</td>
<td>25%</td>
<td>2%</td>
</tr>
<tr>
<td>48%</td>
<td>19%</td>
<td>29%</td>
<td>15%</td>
<td>11%</td>
<td>25%</td>
<td>2%</td>
</tr>
<tr>
<td>47%</td>
<td>17%</td>
<td>30%</td>
<td>10%</td>
<td>17%</td>
<td>25%</td>
<td>0%</td>
</tr>
<tr>
<td>50%</td>
<td>17%</td>
<td>33%</td>
<td>21%</td>
<td>12%</td>
<td>25%</td>
<td>0%</td>
</tr>
<tr>
<td>47%</td>
<td>20%</td>
<td>26%</td>
<td>12%</td>
<td>11%</td>
<td>25%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Loss of Service: 1-9 employees, 10-249 employees, BB only, Any LL

F6 Overall, how satisfied or dissatisfied were you with the length of time it took your provider to resolve your loss of service for your (service), using the following scale?
Base: All with a complete loss of service. Total n=420, 1-9 n=251, 10-249 n=169, broadband only n=161, any landline n=259
Two-thirds found an alternative workaround to the loss of service. Half stated it had a negative impact on their work-related activities, whilst more than two-fifths felt it caused stress.

Larger SMEs / those losing any landline were more likely to be negatively impacted by their service loss.

**Experience of loss of service**

**Business impacts (by business size)**

<table>
<thead>
<tr>
<th>Impact</th>
<th>Total loss</th>
<th>1-9 employees</th>
<th>10-249 employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Found alternative workaround</td>
<td>67</td>
<td>62</td>
<td>70</td>
</tr>
<tr>
<td>Negative impact on work related activities</td>
<td>53</td>
<td>52</td>
<td>66</td>
</tr>
<tr>
<td>Too time to resolve loss of service</td>
<td>47</td>
<td>46</td>
<td>57</td>
</tr>
<tr>
<td>Caused anxiety or stress</td>
<td>44</td>
<td>44</td>
<td>53</td>
</tr>
<tr>
<td>Did not affect business</td>
<td>7</td>
<td>3</td>
<td>53</td>
</tr>
</tbody>
</table>

**Business impacts (by service lost)**

<table>
<thead>
<tr>
<th>Impact</th>
<th>Any LL</th>
<th>BB only</th>
</tr>
</thead>
<tbody>
<tr>
<td>Found alternative workaround</td>
<td>49</td>
<td>76</td>
</tr>
<tr>
<td>Negative impact on work related activities</td>
<td>48</td>
<td>55</td>
</tr>
<tr>
<td>Took time to resolve loss of service</td>
<td>49</td>
<td>43</td>
</tr>
<tr>
<td>Caused anxiety or stress</td>
<td>48</td>
<td>37</td>
</tr>
<tr>
<td>Did not affect business</td>
<td>2</td>
<td>17</td>
</tr>
</tbody>
</table>

F7a Which, if any, of the following would you say applied to your most recent loss of service? Base: All that experienced a loss of service

Total n=420, 1-9 n=251, 10-249 n=169 landline only n=90*, broadband only n=161, landline and broadband together n=189, any landline n=259 *CAUTION LOW BASE
Amongst those who found an alternative workaround, mobiles were most likely to be involved. More than half claim no direct financial cost resulting from their alternative workaround actions. BB (only) workarounds typically cost less.

### Experience of a complete loss of service (any service)

**Found an alternative workaround**

- **Total loss**: 67%
- **BB only**: 49%
- **Any LL**: 76%

#### Actions taken to reduce impact

- **Used mobile to make calls**: 49%
- **Used mobile to receive calls**: 43%
- **Used mobile to access emails**: 40%
- **Used mobile to access Internet**: 35%
- **Went/worked from other location**: 6%
- **Used dongle**: 4%
- **Alternative landline to make calls**: 3%
- **Used backup Internet connection**: 2%
- **Alternative landline to receive calls**: 2%
- **Other**: 0%
- **Didn't do anything**: 12%

#### Direct financial costs of these actions

- **£200+**: 53%
- **£50-200**: 27%
- **<£50**: 20%
- **No direct financial cost**: 20%
- **Don't know**: 19%

**Mean**

- **£798 excl. no direct cost**
- **£526 excl. no direct cost**
- **£877 excl. no direct cost**

---

*F7a Which, if any, of the following would you say applied to your most recent loss of service? Base: All that experienced a loss of service. Total n=420.*

*F7b> What, if anything, did you do to reduce the impact of this loss of service? Base: all who found an alternative workaround n=252, broadband only n=85*, any landline n=195. **F7c> Thinking about the factors you mentioned, what were the direct financial costs to you (e.g. cost of mobile calls) and the people in your business that were caused by your most recent loss of service? Base: all who did something n=255, broadband only n=73 any landline n=182. *CAUTION LOW BASE*
Again, mobiles were most likely to be involved in the workaround. The workaround was more costly for larger SMEs at an average of c£735

Experience of a complete loss of service (any service)
Found an alternative workaround

<table>
<thead>
<tr>
<th>Total</th>
<th>1-9</th>
<th>10-249</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>67%</td>
<td>70%</td>
</tr>
</tbody>
</table>

Actions taken to reduce impact

<table>
<thead>
<tr>
<th>Action</th>
<th>Total</th>
<th>1-9</th>
<th>10-249</th>
</tr>
</thead>
<tbody>
<tr>
<td>Used mobile to make calls</td>
<td>66%</td>
<td>60%</td>
<td>73%</td>
</tr>
<tr>
<td>Used mobile to receive calls</td>
<td>57%</td>
<td>66%</td>
<td>57%</td>
</tr>
<tr>
<td>Used mobile to access emails</td>
<td>40%</td>
<td>40%</td>
<td>40%</td>
</tr>
<tr>
<td>Used mobile to access Internet</td>
<td>38%</td>
<td>35%</td>
<td>35%</td>
</tr>
<tr>
<td>Went/worked from other location</td>
<td>9%</td>
<td>6%</td>
<td>9%</td>
</tr>
<tr>
<td>Used dongle</td>
<td>9%</td>
<td>4%</td>
<td>6%</td>
</tr>
<tr>
<td>Alternative landline to make calls</td>
<td>11%</td>
<td>11%</td>
<td>11%</td>
</tr>
<tr>
<td>Used backup Internet connection</td>
<td>11%</td>
<td>11%</td>
<td>11%</td>
</tr>
<tr>
<td>Alternative landline to receive calls</td>
<td>6%</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Other</td>
<td>8%</td>
<td>8%</td>
<td>7%</td>
</tr>
<tr>
<td>Didn't do anything</td>
<td>13%</td>
<td>6%</td>
<td>12%</td>
</tr>
</tbody>
</table>

Direct financial costs of these actions

<table>
<thead>
<tr>
<th>Direct financial costs</th>
<th>Mean</th>
<th>1-9</th>
<th>10-249</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;£50</td>
<td>£270</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>£50-200</td>
<td>£240</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>£200+</td>
<td>£733</td>
<td>3%</td>
<td>13%</td>
</tr>
</tbody>
</table>

No direct financial cost: 46%

Don't know: 27%

F7a Which, if any, of the following would you say applied to your most recent loss of service? Base: All that experienced a loss of service. Total n=420.
F7b What, if anything, did you do to reduce the impact of this loss of service? Base: all who found an alternative workaround n=280, 1-9 employees n=168, 10-249 employees n=112. F7c Thinking about the factors you mentioned, what were the direct financial costs to you (e.g. cost of mobile calls) and the people in your business that were caused by your most recent loss of service? Base: all who did something n=255, 1-9 employees n=148, 10-249 employees n=107
Two thirds of those that found a workaround claim that it had a negative impact on their normal activities (the workaround negatively affected three quarters of larger SMEs).

**Extent to which normal activities affected by workaround/loss of service**

<table>
<thead>
<tr>
<th>Total “had an impact”</th>
<th>Found workaround</th>
<th>No workaround</th>
<th>Found workaround</th>
<th>No workaround</th>
<th>Found workaround</th>
<th>No workaround</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Any loss of service</td>
<td>broadband only</td>
<td>Any landline</td>
<td>Any landline</td>
<td>Any landline</td>
<td>Any landline</td>
</tr>
<tr>
<td>0 - not affected</td>
<td>57% (1-9=56% / 10+ =72%)</td>
<td>62% (1-9=61% / 10+ =85%)</td>
<td>57% (1-9=56% / 10+ =72%)</td>
<td>62% (1-9=61% / 10+ =85%)</td>
<td>57% (1-9=56% / 10+ =72%)</td>
<td>62% (1-9=61% / 10+ =85%)</td>
</tr>
<tr>
<td>1</td>
<td>15%</td>
<td>13%</td>
<td>12%</td>
<td>12%</td>
<td>16%</td>
<td>16%</td>
</tr>
<tr>
<td>2</td>
<td>13%</td>
<td>11%</td>
<td>11%</td>
<td>10%</td>
<td>15%</td>
<td>16%</td>
</tr>
<tr>
<td>3</td>
<td>15%</td>
<td>14%</td>
<td>24%</td>
<td>15%</td>
<td>16%</td>
<td>16%</td>
</tr>
<tr>
<td>4</td>
<td>15%</td>
<td>11%</td>
<td>11%</td>
<td>10%</td>
<td>16%</td>
<td>19%</td>
</tr>
<tr>
<td>5 - very great impact</td>
<td>20%</td>
<td>22%</td>
<td>28%</td>
<td>24%</td>
<td>24%</td>
<td>19%</td>
</tr>
</tbody>
</table>

F7d To what extent were your normal activities affected by this workaround? Base: all that found alternative workaround and did something n=255, broadband only n=73*, any landline n=182. F10 To what extent were your normal activities affected by this loss of service? Please use a scale where 0 indicates ‘not affected’ (i.e. was able to carry out same activity as would have done in event of no loss of service) and 5 indicates a very large impact (i.e. it was not possible to do any of the things you usually do using the service you lost. Base: all that did NOT find an alternative workaround n=140, broadband only n=76*, any landline n=64* *CAUTION LOW BASE
The majority (95%) of those who took time to try and resolve their loss of service, called their provider. About half spent time trying to fix it themselves. Half spent less than 6 hours trying to fix their fault.

Experience of a complete loss of service (any service)

**Took time to try to resolve loss of service**

- **Total**: 47%
- **1-9 employees**: 46%
- **10-249 employees**: 57%

**Actions taken to try to resolve**

- Called provider
  - Total: 95%
  - 1-9 employees: 95%
  - 10-249 employees: 94%
- Spent time trying to fix by self
  - Total: 55%
  - 1-9 employees: 55%
  - 10-249 employees: 51%
- Looked at provider website
  - Total: 27%
  - 1-9 employees: 27%
  - 10-249 employees: 27%
- Other
  - Total: 7%
  - 1-9 employees: 8%
  - 10-249 employees: 4%

**Time taken trying to get services back**

- Up to 6 hours: 60%
- 6-12 hours: 55%
- 12-23 hours: 6%
- 1 day: 10%
- 1-2 days: 9%
- 2 days: 1%
- 2-5 days: 6%
- Longer: 1%
- No time spent: 9%
- Don't know: 12%

F8a What did you do to try to resolve your loss of service?
F8b How much time did you and other people in your business spend trying to get your service(s) fixed? Please think about all the things that you and others in your business spent time on to resolve the loss (e.g. time spent on the phone with your provider or time spent trying to fix the problem yourselves). It should not include the time spent waiting for an engineer visit(s).

*CAUTION LOW BASE*
The majority (95%) of those who took time to try and resolve their loss of service, called their provider. About half spent time trying to fix it themselves. Half spent less than 6 hours trying to fix their fault.

Experience of a complete loss of service (any service)

### Took time to try to resolve loss of service

<table>
<thead>
<tr>
<th></th>
<th>Total loss</th>
<th>BB only</th>
<th>Any LL</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>47%</strong></td>
<td><strong>43%</strong></td>
<td><strong>49%</strong></td>
<td></td>
</tr>
</tbody>
</table>

### Actions taken to try to resolve

- **Called provider**
  - 95%
  - 96%
  - 95%

- **Spent time trying to fix by self**
  - 55%
  - 62%
  - 51%

- **Looked at provider website**
  - 27%
  - 32%
  - 24%

- **Other**
  - 7%
  - 5%
  - 8%

### Time taken trying to get services back

- **Up to 6 hours**
  - 54%
  - 60%
  - 63%

- **6-12 hours**
  - 6%
  - 8%

- **12-23 hours**
  - 3%
  - 4%

- **1 day**
  - 3%
  - 4%

- **1-2 days**
  - 3%
  - 2%

- **2 days**
  - 3%
  - 5%

- **2-5 days**
  - 8%
  - 9%

- **Longer**
  - 4%
  - 8%

- **No time spent**
  - 9%
  - 17%

- **Don’t know**
  - 0%

---

F8a What did you do to try to resolve your loss of service? F8b How much time did you and other people in your business spend trying to get your service(s) fixed? Please think about all the things that you and others in your business spent time on to resolve the loss (e.g. time spent on the phone with your provider or time spent trying to fix the problem yourselves). It should not include the time spent waiting for an engineer visit(s).

Base: all that took time to resolve n=235, 1-9 employees n=134, 10-249 employees n=101, total loss n=235, broadband only n=87*, any landline n=148
Key negative impacts of loss were time wasted (especially micros) - and work disrupted and stress (especially larger SMEs and BB (only) loss of service). 6 in 10 claimed an impact on supplier communications and more than half felt an impact on sales or revenue.

Experience of a complete loss of service (any service)

Loss of service had a negative impact

Any of following applied?

- Manager time wasted
- Stress
- Disruption to staff ability to work
- Impact on communications with suppliers
- Impact on sales or revenue
- Longer working hours
- Impact on brand
- Other
- None of these

F9 Did any of the following apply to your most recent loss of service? Base: all that had a negative impact n=264, 1-9 employees n=142, 10-249 employees n=121
Any that had a negative impact through total loss of service n=264, broadband only n=108, any landline n=156

Total 53%
1-9 52%
10-249 66%

Total loss 53%
BB only 48%
Any LL 55%
Larger SMEs less likely to say no-one was prevented from working

### Experience of loss of service

#### People prevented from working by loss of service

<table>
<thead>
<tr>
<th>Category</th>
<th>1-9 Employees</th>
<th>10-249 Employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>None prevented from working</td>
<td>60%</td>
<td>48%</td>
</tr>
<tr>
<td>1 person</td>
<td>21%</td>
<td>23%</td>
</tr>
<tr>
<td>2-4 people</td>
<td>15%</td>
<td>17%</td>
</tr>
<tr>
<td>5+ people</td>
<td>33%</td>
<td></td>
</tr>
</tbody>
</table>

#### Working hours lost as result of loss service

<table>
<thead>
<tr>
<th>Category</th>
<th>1-9 Employees</th>
<th>10-249 Employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>None prevented from working</td>
<td>60%</td>
<td>48%</td>
</tr>
<tr>
<td>1 person</td>
<td>21%</td>
<td>23%</td>
</tr>
<tr>
<td>2-4 people</td>
<td>15%</td>
<td>17%</td>
</tr>
<tr>
<td>5+ people</td>
<td>33%</td>
<td></td>
</tr>
</tbody>
</table>

F11 As a result of your loss of [landline telephone / fixed broadband] how many people, if any, were prevented from working? Base: all loss of service n=420, 1-9 employees n=251, 10-249 employees n=169 F12 Approximately how many working hours do you think were lost as a result of your loss of [landline telephone / fixed broadband] / delay in service activation or upgrade? Please don’t include the time taken to fix the issue. Base: all where people prevented from working n=199 1-9 employees n=103, 10-249 employees n=96* "CAUTION LOW BASE"
Overall, two thirds feel the loss of service had an impact on the communication needs of their business (a very great impact in a third of cases). This is driven by loss of any landline. Loss of broadband alone is less impactful. Larger SMEs felt the impact more than smaller ones.

Impact of loss of service on communication needs of business

<table>
<thead>
<tr>
<th>Total “had an impact”</th>
<th>67%</th>
<th>66%</th>
<th>80%</th>
<th>62%</th>
<th>69%</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 - no impact at all</td>
<td>14%</td>
<td>15%</td>
<td>14%</td>
<td>20%</td>
<td>12%</td>
</tr>
<tr>
<td>1</td>
<td>7%</td>
<td>7%</td>
<td>5%</td>
<td>4%</td>
<td>8%</td>
</tr>
<tr>
<td>2</td>
<td>11%</td>
<td>11%</td>
<td>12%</td>
<td>14%</td>
<td>9%</td>
</tr>
<tr>
<td>3</td>
<td>16%</td>
<td>16%</td>
<td>15%</td>
<td>12%</td>
<td>18%</td>
</tr>
<tr>
<td>4</td>
<td>19%</td>
<td>19%</td>
<td>21%</td>
<td>21%</td>
<td>18%</td>
</tr>
<tr>
<td>5 - very great impact</td>
<td>32%</td>
<td>31%</td>
<td>43%</td>
<td>29%</td>
<td>34%</td>
</tr>
</tbody>
</table>

Loss of Service | 1-9 employees | 10-249 employees | BB only | Any LL

F3 Thinking back to when you experienced your most recent loss service. How much of an impact did this have on the communication needs of your business? Base: All that experienced a loss of service. Total n=420, 1-9 n=251, 10-249 n=169 landline only n=90*, broadband only n=161, any landline n=259, landline and broadband together n=189

*CAUTION LOW BASE
Three fifths feel that the loss of their service had an impact on their business generally. Larger SMEs felt the impact more than smaller ones.

### Impact of loss of service on business generally

<table>
<thead>
<tr>
<th>Impact Level</th>
<th>Total “had an impact”</th>
<th>Loss of Service</th>
<th>1-9 employees</th>
<th>10-249 employees</th>
<th>BB only</th>
<th>Any LL</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 - no impact at all</td>
<td>61%</td>
<td>19%</td>
<td>19%</td>
<td>11%</td>
<td>27%</td>
<td>15%</td>
</tr>
<tr>
<td>1</td>
<td>61%</td>
<td>8%</td>
<td>8%</td>
<td>9%</td>
<td>3%</td>
<td>10%</td>
</tr>
<tr>
<td>2</td>
<td>73%</td>
<td>11%</td>
<td>12%</td>
<td>17%</td>
<td>9%</td>
<td>12%</td>
</tr>
<tr>
<td>3</td>
<td>61%</td>
<td>15%</td>
<td>14%</td>
<td>18%</td>
<td>12%</td>
<td>16%</td>
</tr>
<tr>
<td>4</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>18%</td>
<td>16%</td>
</tr>
<tr>
<td>5 - very great impact</td>
<td>62%</td>
<td>29%</td>
<td>29%</td>
<td>39%</td>
<td>29%</td>
<td>29%</td>
</tr>
</tbody>
</table>

F15 How much of an impact did the loss of your [relevant service] / delay in service activation or upgrade have on your business? Base: All that experienced a loss of service Total n=420, 1-9 n=251, 10-249 n=169, landline only n=90, broadband only n=161, any landline n=259 *CAUTION LOW BASE
Section 5
Compensation for loss of service
11% received compensation for their LoS. Larger SMEs more likely to have asked for yet not received compensation for loss of service

Compensation for loss of service

NET compensation received

- 11% asked & received
- 11% not asked but received
- 7% asked & NOT received
- 7% NOT asked, NOT received
- 14% don’t know

11% received compensation for their LoS. Larger SMEs more likely to have asked for yet not received compensation for loss of service.
The vast majority have not asked for compensation - key reasons being a lack of expectation, a belief that it wouldn’t be worth the effort or because the provider wasn’t at fault.

Experience of a loss of service (any LL/BB or LL&BB)

Received compensation for loss of service?

- **11%** Yes
- **89%** No

**Asked for compensation?**

- **10%** Asked
- **89%** Did not ask
- **2%** Don’t know

**Why not ask?**

- Not worth it: 23%
- Didn’t expect to get: 19%
- No provider fault: 18%
- Didn’t know how: 13%
- Minor issue/no impact: 10%
- Forgot: 8%
- Not bothered: 5%
- Not eligible due to T&Cs: 3%
- Too busy: 2%
- Issue unresolved: 2%

H1a Did you receive any compensation from your provider for this loss of service? All that experienced a loss of service n=420 H1c/d Did you ask for compensation or was it offered/did you ask for compensation in regard to the loss of service? Base: all that did not receive compensation n=384. H1e Why did you not ask for compensation? Base: all who did not get or ask for compensation n=321.
Around two-fifths would expect some compensation for loss of service. Majority of these would expect it in the form of account credit.

**Expected compensation (amongst all with loss of service yet not received/asked/offered)**

<table>
<thead>
<tr>
<th>Level of payment enough to compensate business for impact</th>
<th>Form would expect compensation to take</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mean</td>
<td>Credit on account</td>
</tr>
<tr>
<td>£301 excl. “no need” £160</td>
<td>Cash</td>
</tr>
<tr>
<td>£282 excl. “no need” £151</td>
<td>Future discounts/reductions</td>
</tr>
<tr>
<td>£730 excl. “no need” £330</td>
<td>Free service upgrade</td>
</tr>
<tr>
<td>£301 excl. “no need” £160</td>
<td>No need, no adverse impact</td>
</tr>
<tr>
<td>£300 excl. “no need” £126</td>
<td>Don’t know</td>
</tr>
</tbody>
</table>

H1k Thinking back to the loss of service you have described and all of the impacts that the loss of service had on your business what level of payment do you think would be enough to compensate your business for that impact? All who experienced a complete loss of service but did not receive ask for or get compensation n=321

H1l What form would you like that compensation to take? Base: all giving an amount n=129
More than half of SMEs accept that service loss can occur. Some have looked into switching as a result of service loss but only 6% have actually done so.

### Experience of loss of service (any LL/BB or LL&BB)

#### Impact on attitudes to supplier relationship

- **You accepted that service loss occurs sometimes**
  - Any loss of service: 52%
  - 1-9 employees: 14%
  - 10-249 employees: 16%

- **Happy with their response to dealing with the issue**
  - Any loss of service: 16%
  - 1-9 employees: 14%
  - 10-249 employees: 16%

- **Looked into changing supplier as a direct result of the issue but decided not to as still within minimum contract period**
  - Any loss of service: 14%
  - 1-9 employees: 5%
  - 10-249 employees: 6

- **Changed supplier since the problem occurred as a direct result of the issue**
  - Any loss of service: 52
  - 1-9 employees: 8
  - 10-249 employees: 9

- **You are actively looking to change your supplier as a direct result of the issue**
  - Any loss of service: 8
  - 1-9 employees: 8
  - 10-249 employees: 9

- **You looked into changing supplier as a direct result of the issue but decided not to because of other reasons**
  - Any loss of service: 9
  - 1-9 employees: 9
  - 10-249 employees: 9

- **Thought about changing supplier as a direct result of the issue but have not looked into it**
  - Any loss of service: 8
  - 1-9 employees: 5
  - 10-249 employees: 8

- **No impact**
  - Any loss of service: 8
  - 1-9 employees: 8
  - 10-249 employees: 7

- **Other**
  - Any loss of service: 3
  - 1-9 employees: 2

---

H1m Taking everything into account that happened when you lost service, the processes you went through and the time taken to get your service restored, has this had any of the following effects on your attitudes towards your relationship with the supplier?

Base: All who experienced loss of service for any/LL only/BB only/LL&BB n=420, 1-9 employees n=251, 10-249 employees n=169
More than half of SMEs accept that service loss can occur. Some have looked into switching as a result of service loss but only 6% have actually done so.

Experience of loss of service (any LL/BB or LL&BB)

Impact on attitudes to supplier relationship

- **You accepted that service loss occurs sometimes**
  - Any loss of service: 52%
  - Any LL loss: 11%
  - BB (only) loss: 16%

- **Happy with their response to dealing with the issue**
  - Any loss of service: 19%
  - Any LL loss: 16%
  - BB (only) loss: 8%

- **Looked into changing supplier as a direct result of the issue but decided not to as still within minimum contract period**
  - Any loss of service: 17%
  - Any LL loss: 6%
  - BB (only) loss: 8%

- **Changed supplier since the problem occurred as a direct result of the issue**
  - Any loss of service: 6%
  - Any LL loss: 6%
  - BB (only) loss: 7%

- **You are actively looking to change your supplier as a direct result of the issue**
  - Any loss of service: 8%
  - Any LL loss: 9%
  - BB (only) loss: 9%

- **You looked into changing supplier as a direct result of the issue but decided not to because of other reasons**
  - Any loss of service: 9%
  - Any LL loss: 9%
  - BB (only) loss: 9%

- **Thought about changing supplier as a direct result of the issue but have not looked into it**
  - Any loss of service: 9%
  - Any LL loss: 9%
  - BB (only) loss: 9%

- **No impact**
  - Any loss of service: 3%
  - Any LL loss: 3%
  - BB (only) loss: 4%

- **Other**
  - Any loss of service: 1%

H1m Taking everything into account that happened when you lost service, the processes you went through and the time taken to get your service restored, has this had any of the following effects on your attitudes towards your relationship with the supplier?

*CAUTION LOW BASE*
Section 6
Experience of missed appointments and compensation
0.8 days on average is considered reasonable notice of a cancellation/change to an engineer appointment. Around half say 24 hours is sufficient.

Reasonable notice for an engineer appointment to be cancelled or changed by provider

- **No notice**: 5%
- **Less than an hour**: 8%
- **1-23 hours**: 29%
- **0.8 days**: 10%
- **1 day (24h)**: 48%
- **Longer**: 0%

Mean 1-9 employees: 0.8 days
Mean 10-249 employees: 1.0 days

Some telephone line or broadband installation or repair processes require an engineer to visit the customer’s home to carry out the work. Customers are usually given a specific time slot within which to expect the engineer’s visit and sometimes engineers fail to arrive within the allotted time slot. What do you consider to be a reasonable amount of notice for an engineer appointment to be cancelled or changed by your provider? Please give your answer in hours or days.

Base: Total Sample with landline or broadband n=991
7% have had experience of a missed appointment (more than twice that amongst larger SMEs who are also more likely to have had more than one occurrence)

Experience of a missed appointment

Ever experienced?

<table>
<thead>
<tr>
<th>Total</th>
<th>1-9 employees</th>
<th>10-249 employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>7%</td>
<td>7%</td>
<td>18%</td>
</tr>
</tbody>
</table>

How many in last 2 years?

- One: 40% (Total), 38% (1-9 employees), 40% (10-249 employees)
- Two: 28% (Total), 28% (1-9 employees), 55% (10-249 employees)
- Three: 8% (Total), 8% (1-9 employees), 7% (10-249 employees)
- Four: 4% (Total), 4% (1-9 employees), 5% (10-249 employees)
- Five or more: 8% (Total), 8% (1-9 employees), 8% (10-249 employees)
- None in past 2 years: 16% (Total), 16% (1-9 employees), 16% (10-249 employees)

What happened after appointment missed (last 2 years)?

- Rearranged for another day: 69% (10-249 employees)
- Engineer turned up later that day: 21%
- Cancelled altogether: 4%
- Still waiting for re-arrangement: 2%
- Other: 5%

I1a Have you ever experienced a missed appointment regarding a landline and/or broadband service (i.e. where an engineer was scheduled to arrive at your home within a specified appointment window and did not turn up within that time)? This could be, for example, to install a new service or repair an existing service.

Base: Total Sample with a landline or broadband n=991. 1-9 employees n=641, 10-249 n=350.

I2b Overall how many missed appointments have you experienced in the last two years? I3 What happened after the appointment was missed? Base: all that experienced a missed appointment n=108, 1-9 employees n=52*, 10-249 employees n=56* *CAUTION LOW BASE
6 in 10 SMEs say they experienced anxiety and stress as result of the missed appointment. More than half took time to re-arrange or lost staff working time.

### Experience of a missed appointment

<table>
<thead>
<tr>
<th>Ever experienced?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
</tr>
<tr>
<td>1-9 employees</td>
</tr>
<tr>
<td>10-249 employees</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>7%</td>
</tr>
<tr>
<td>7%</td>
</tr>
<tr>
<td>18%</td>
</tr>
</tbody>
</table>

### Which applied to most recent missed appointment?

- Increased anxiety and stress: 61%
- Took time to re-arrange: 59%
- Lost staff work time: 52%
- Missed/rearranged meetings: 33%
- Had to pay overtime: 8%
- Not affected: 4%

### Time spent waiting for engineer to arrive

<table>
<thead>
<tr>
<th>Time</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-2 hours</td>
<td>29%</td>
</tr>
<tr>
<td>3-8 hours</td>
<td>16%</td>
</tr>
<tr>
<td>8 hours</td>
<td>14%</td>
</tr>
<tr>
<td>Longer</td>
<td>23%</td>
</tr>
<tr>
<td>Didn’t spend any time</td>
<td>14%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>4%</td>
</tr>
</tbody>
</table>

### Time spent trying to get another appointment

<table>
<thead>
<tr>
<th>Time</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt; one hour</td>
<td>24%</td>
</tr>
<tr>
<td>1-3 hours</td>
<td>45%</td>
</tr>
<tr>
<td>3-8 hours</td>
<td>13%</td>
</tr>
<tr>
<td>More than 8 hours</td>
<td>5%</td>
</tr>
<tr>
<td>Did not spend any time</td>
<td>12%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>1%</td>
</tr>
</tbody>
</table>

I2a Have you ever experienced a missed appointment regarding a landline and/or broadband service (i.e. where an engineer was scheduled to arrive at your business within a specified appointment window and did not turn up within that time)? This could be, for example, to install a new service or repair an existing service. Base: Total Sample n=2088.

I4 How much time did you spend waiting for the engineer to arrive? I6 M4 Which, if any, of the following would you say applied to your most recent missed appointment? Base: all that experienced a missed appointment in past 2 years n=97*.

I8 M9 How much time did you and other people in your business spend trying to get another appointment? (e.g. time spent on the phone with your provider). It should not include the time spent while waiting for the original missed appointment. *CAUTION LOW BASE
More than 8 in 10 SMEs contacted their provider to re-arrange the missed appointment (majority by phone). On average contact was made 3.4 times.

Experience of a missed appointment

**Actions taken by you/others to re-arrange**
- **Contacted provider**: 83%
- **Assumed provider would contact**: 26%
- **Checked provider website**: 17%
- **Nothing**: 7%

**How contacted?**
- **Phone**: 95%
- **Webchat**: 8%
- **Email**: 5%

**How many times contacted provider?**
- **Once**: 31%
- **Twice**: 17%
- **3 times**: 26%
- **4 times**: 7%
- **5 times**: 4%
- **6+ times**: 14%

**Mean**: 3.4
On average 12 working hours were lost as a result of the missed appointment and more than half felt it had had an impact on business or on working hours lost.

Experience of a missed appointment

**Approximate working hours lost as result**

<table>
<thead>
<tr>
<th>Duration</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-2 hours</td>
<td>21%</td>
</tr>
<tr>
<td>3-8 hours</td>
<td>25%</td>
</tr>
<tr>
<td>9-23 hours</td>
<td>10%</td>
</tr>
<tr>
<td>24 hours</td>
<td>12%</td>
</tr>
<tr>
<td>Longer</td>
<td>9%</td>
</tr>
<tr>
<td>Didn't spend any time</td>
<td>24%</td>
</tr>
</tbody>
</table>

**Mean**

11.6

**Impact of the missed appointment on business**

<table>
<thead>
<tr>
<th>Impact of the missed appointment on business</th>
<th>% had an impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Loss of working hours</td>
<td>57%</td>
</tr>
<tr>
<td>0 - no impact at all</td>
<td>19%</td>
</tr>
<tr>
<td>1</td>
<td>9%</td>
</tr>
<tr>
<td>2</td>
<td>15%</td>
</tr>
<tr>
<td>3</td>
<td>18%</td>
</tr>
<tr>
<td>4</td>
<td>9%</td>
</tr>
<tr>
<td>5 - very great impact</td>
<td>30%</td>
</tr>
<tr>
<td>General impact on business</td>
<td>59%</td>
</tr>
<tr>
<td>0 - no impact at all</td>
<td>17%</td>
</tr>
<tr>
<td>1</td>
<td>12%</td>
</tr>
<tr>
<td>2</td>
<td>11%</td>
</tr>
<tr>
<td>3</td>
<td>16%</td>
</tr>
<tr>
<td>4</td>
<td>10%</td>
</tr>
<tr>
<td>5 - very great impact</td>
<td>32%</td>
</tr>
</tbody>
</table>

*CAUTION LOW BASE

I10 Approximately how many working hours do you think were lost as a result of your missed appointment? Please don't include the time taken to fix the issue.

I11 How much of an impact did this loss of working hours have on your business? Please use a scale of 0 to 5 where 0 denotes “No impact at all” and 5 denotes “Very great impact.”

I15 Thinking back to when you experienced a missed appointment, how much of an impact did this have on you and your business? Please use a scale of 0 to 5 where 0 denotes “No impact at all” and 5 denotes “Very great impact.” Base: all that experienced a missed appointment in the past 2 years n=97
Overall, only 4% received compensation for their missed appointment.

**Missed appointment compensation**

- **NET compensation received**: 4%
  - Asked & received: 2%
  - Not asked but received: 14%
  - Asked & NOT received: 82%
  - NOT asked, NOT received

**COMPENSATION SUMMARY**: Base: all that experienced a missed appointment in the past 2 years n=97* *CAUTION LOW BASE
Only 4% received compensation for a missed appointment. Majority of SMEs had not asked for this anyway; largely because the either didn’t expect to receive any or that the amount would not be worth the effort.

**Experience of a missed appointment**

- **Received compensation for missed appointment?**
  - 4%
  - 96%

- **Asked for compensation?**
  - Asked: 15%
  - Did not ask: 85%

- **Why not ask?**
  - Didn’t expect to get: 39%
  - Not worth it: 19%
  - Forgot: 14%
  - Didn’t know how: 13%
  - Not providers fault: 8%
  - Other: 12%

*I12a M16 Did you receive any compensation from your provider for this missed appointment? Base: all with missed appointment in past 2 years n=97*  
*I12bi Did you ask for compensation in regards to the missed appointment? We are referring to you proactively asking for compensation rather than simply notifying your provider of the missed appointment.  
*I12c M18a Why did you not ask for compensation? Base: all who did not get or ask for compensation n=73*.  
*CAUTION LOW BASE*
59% of SMEs expect compensation for a missed appointment, 41% do not - mainly because “these things happen” or because it would have a minimal financial impact to their business.

Hypothetical missed appointment

Expect to be compensated for a missed appointment?

<table>
<thead>
<tr>
<th>Amount</th>
<th>1-9 employees</th>
<th>10-249 employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>£95</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>£1125</td>
<td>2%</td>
<td>7%</td>
</tr>
<tr>
<td>£26-50</td>
<td>7%</td>
<td>6%</td>
</tr>
<tr>
<td>£51-100</td>
<td>6%</td>
<td>3%</td>
</tr>
<tr>
<td>£101-200</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>£201+</td>
<td>4%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Would expect but not sure how much

- Total: 26%
- 1-9 employees: 29%
- 10-249 employees: 28%

Not sure if should receive

- Total: 12%
- 1-9 employees: 13%
- 10-249 employees: 12%

None expected

- Total: 29%
- 1-9 employees: 28%
- 10-249 employees: 39%

59% expect compensation

Form would expect compensation to take

- Credit on account: 65%
- Cash: 58%
- Future discounts/reductions: 34%
- Free service upgrade: 32%

Why not expect to receive compensation?

- These things happen: 46%
- No financial impact: 16%
- Not bothered: 11%
- Issue quickly resolved: 11%
- Didn’t expect to get: 2%
- Amount not worth it: 2%
- Just a one-off: 1%
- Never thought about it: 1%
- Minor issue: 19%
- Not eligible due to T&Cs: 1%
- Used back ups: 1%

I13a I’d like you to imagine a situation where you had been given an appointment time by your supplier for an engineer to visit your business to install, repair or upgrade one of your services and the engineer did not turn up at all. Would you expect to be compensated for this missed appointment? and if so, how much? Base: all that have not experienced a missed appointment n=883, 1-9 employees n=589, 10-249 employees n=294. I13b M23 Why would you not expect to receive any compensation for the missed appointment? Base: all who don’t expect compensation n=289 I12c M24 What form would you expect that compensation to take? Base: all who gave amount n=204
Automatic compensation:

Minimum standards & willingness to pay more/less for better/worse service: Consumers
On average, 5 days is considered a reasonable wait time for an installation appointment. 11 days (1 ½ weeks) is considered to be unacceptable.

**CONSUMERS: Installation of a new fixed line broadband service or landline service**

<table>
<thead>
<tr>
<th>Reasonable wait time for appointment (days)</th>
<th>Unacceptable wait time for appointment (days)</th>
</tr>
</thead>
<tbody>
<tr>
<td>All with landline/broadband</td>
<td>All with landline/broadband</td>
</tr>
<tr>
<td>Zero</td>
<td>Zero</td>
</tr>
<tr>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>One</td>
<td>One</td>
</tr>
<tr>
<td>10%</td>
<td>2%</td>
</tr>
<tr>
<td>Two</td>
<td>Two</td>
</tr>
<tr>
<td>20%</td>
<td>6%</td>
</tr>
<tr>
<td>Three</td>
<td>Three</td>
</tr>
<tr>
<td>13%</td>
<td>7%</td>
</tr>
<tr>
<td>Four</td>
<td>Four</td>
</tr>
<tr>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>Five</td>
<td>Five</td>
</tr>
<tr>
<td>11%</td>
<td>6%</td>
</tr>
<tr>
<td>Six</td>
<td>Six</td>
</tr>
<tr>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>Seven</td>
<td>Seven</td>
</tr>
<tr>
<td>26%</td>
<td>19%</td>
</tr>
<tr>
<td>8 or more</td>
<td>8 or more</td>
</tr>
<tr>
<td>13%</td>
<td>54%</td>
</tr>
</tbody>
</table>

Mean 5.4  Median 5.0
Mean 11.3  Median 8.0

All that have experienced provision
Mean 6.2  Median 5.0
All that have not experienced provision
Mean 5.3  Median 5.0

All that have experienced provision
Mean 13.4  Median 10.0
All that have not experienced provision
Mean 10.9  Median 8.0
Around half initially claim they would not accept a reduced price for a delayed install and slightly higher proportions would not pay more for a faster install.

**CONSUMERS: Installation of a new fixed line broadband service or landline service - Trade off scenarios**

<table>
<thead>
<tr>
<th>Scenario</th>
<th>16 Days Install</th>
<th>14 Days Install</th>
<th>14 Days Install</th>
<th>16 Days Install</th>
<th>14 Days Install</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accept £5 less for install</td>
<td>34%</td>
<td>41%</td>
<td>44%</td>
<td>50%</td>
<td>56%</td>
</tr>
<tr>
<td>Accept £10 less for install</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wouldn’t accept any delay/price change for 14 day install</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wouldn’t accept any delay/price change for 16 day install</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Unwilling to accept delayed install / reduction in price**
- I wouldn’t want an installation longer than 12 days: 63%
- The price decreases weren’t enough to justify the longer installation: 38%
- Would expect it to be free: 8%

**Price reduction would accept for 14 DAY installation**
- £23.30 mean
- £20.00 median

**Unwilling to pay more for faster install**
- I’m happy with a 12 day installation period: 40%
- The price increases were too much to justify the faster installation: 49%
- Would expect it to be free or very cheap: 12%

**Price would accept for 8 DAY installation**
- Pay nothing extra = 91%

(Base too small to show acceptable prices)

C3 An appointment is usually available within 12 days for an engineer to visit you to install a fixed line service and the installation price is £40. Which of the following best describes why you would be unwilling to accept a slower installation at a cheaper price? Landline/broadband installation n=1069

C4 Which of the following best describes why you would be unwilling to pay a higher price for faster installation? All with landline/broadband unwilling to accept slower installation n=1069 All with landline/broadband unwilling to pay high price for faster installation n=1064
On average, 3 days is considered an reasonable wait time for a fault to be fixed. Just under a week (6 days) is considered to be unacceptable.

**CONSUMERS: Loss of service to fixed line broadband service or landline service**

**Reasonable** wait time for fault to be fixed (days)

<table>
<thead>
<tr>
<th></th>
<th>All with landline/broadband</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zero</td>
<td>1%</td>
</tr>
<tr>
<td>One</td>
<td>28%</td>
</tr>
<tr>
<td>Two</td>
<td>36%</td>
</tr>
<tr>
<td>Three</td>
<td>15%</td>
</tr>
<tr>
<td>Four</td>
<td>5%</td>
</tr>
<tr>
<td>Five</td>
<td>6%</td>
</tr>
<tr>
<td>Six</td>
<td>1%</td>
</tr>
<tr>
<td>Seven</td>
<td>6%</td>
</tr>
<tr>
<td>8 or more</td>
<td>2%</td>
</tr>
</tbody>
</table>

**Unacceptable** wait time for fault to be fixed (days)

<table>
<thead>
<tr>
<th></th>
<th>All with landline/broadband</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zero</td>
<td>0%</td>
</tr>
<tr>
<td>One</td>
<td>3%</td>
</tr>
<tr>
<td>Two</td>
<td>15%</td>
</tr>
<tr>
<td>Three</td>
<td>19%</td>
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<tr>
<td>Four</td>
<td>9%</td>
</tr>
<tr>
<td>Five</td>
<td>12%</td>
</tr>
<tr>
<td>Six</td>
<td>4%</td>
</tr>
<tr>
<td>Seven</td>
<td>21%</td>
</tr>
<tr>
<td>8 or more</td>
<td>18%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Reasonable wait time for fault to be fixed (days)</th>
<th>Unacceptable wait time for fault to be fixed (days)</th>
</tr>
</thead>
<tbody>
<tr>
<td>All that have experienced BB/LL LoS</td>
<td>All that have experienced BB/LL LoS</td>
</tr>
<tr>
<td>Mean 2.6</td>
<td>Mean 6.2</td>
</tr>
<tr>
<td>Median 2.0</td>
<td>Median 4.0</td>
</tr>
<tr>
<td>All that have not experienced BB/LL LoS</td>
<td>All that have not experienced BB/LL LoS</td>
</tr>
<tr>
<td>Mean 2.8</td>
<td>Mean 6.1</td>
</tr>
<tr>
<td>Median 2.0</td>
<td>Median 5.0</td>
</tr>
</tbody>
</table>

C5b Please think back to when you experienced loss of service for [fixed line/BB/mobile]. How long do you think it would have been reasonable to wait for the fault to be fixed? 'Reasonable' does not have to mean your ‘ideal’ situation, but one that would be generally satisfactory to you. Please give your answer in terms of calendar days

C6 And what would be an unacceptable length of time to wait? Please give your answer in terms of calendar days

landline/broadband installation n=1898 / experienced loss of service n=345 / all asked hypothetical question n=1553
Half claim they would not accept a £5 reduction in price for a delayed repair, whilst more than half would not pay more for a faster repair.

CONSUMERS: Loss of service to fixed line broadband service or landline service - Trade off scenarios

Unwilling to accept delayed repair / reduction in price

- I wouldn't want to wait longer than 2 days: 68%
- The discount wasn't enough to justify the additional wait: 24%
- My current service provider offers better than 2 days for repair: 12%
- Would expect it to be free: 10%

Price would accept for 3 day repair

- £27.80 mean
- £20.00 median

Unwilling to pay more for faster repair

- I'm happy with a 2 day wait for a repair: 54%
- The prices were too much to justify the faster repair: 28%
- Would expect it to be free: 14%
- My current service provider offers better than 2 days for repair: 12%

Price would pay for repair within 1 day

- Nothing extra = 93%

C7 Which of the following best describes why you would be unwilling to accept a slower repair time for a discount off your net bill? landline/broadband installation n=1898 All with landline/broadband unwilling to accept slower repair time n=736

C8 Which of the following best describes why you would be unwilling to pay a price for a faster repair? All with landline/broadband unwilling to pay high price for faster installation n=990
On average, 5 ½ days is considered a reasonable wait time for an installation appointment. 14 ½ days (2 weeks) is considered to be unacceptable.

**SMEs: Installation of a new fixed line broadband service or landline service**

<table>
<thead>
<tr>
<th>Acceptable wait time for appointment (days)</th>
<th>Unacceptable wait time for appointment (days)</th>
</tr>
</thead>
<tbody>
<tr>
<td>All with landline/broadband</td>
<td>All with landline/broadband</td>
</tr>
<tr>
<td>Zero</td>
<td>Zero</td>
</tr>
<tr>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>One</td>
<td>One</td>
</tr>
<tr>
<td>12%</td>
<td>0%</td>
</tr>
<tr>
<td>Two</td>
<td>Two</td>
</tr>
<tr>
<td>21%</td>
<td>6%</td>
</tr>
<tr>
<td>Three</td>
<td>Three</td>
</tr>
<tr>
<td>14%</td>
<td>10%</td>
</tr>
<tr>
<td>Four</td>
<td>Four</td>
</tr>
<tr>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Five</td>
<td>Five</td>
</tr>
<tr>
<td>11%</td>
<td>5%</td>
</tr>
<tr>
<td>Six</td>
<td>Six</td>
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<td>1%</td>
<td>4%</td>
</tr>
<tr>
<td>Seven</td>
<td>Seven</td>
</tr>
<tr>
<td>23%</td>
<td>16%</td>
</tr>
<tr>
<td>8 or more</td>
<td>8 or more</td>
</tr>
<tr>
<td>14%</td>
<td>54%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>Don’t know</td>
</tr>
<tr>
<td>1%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Mean 5.6  
Median 4.0

Mean 14.5  
Median 8.0

All that have experienced provision
Mean 6.7  
Median 6.0

All that have not experienced provision
Mean 5.3  
Median 3.0

All that have experienced provision
Mean 14.5  
Median 9.0

All that have not experienced provision
Mean 14.4  
Median 8.0

C1/C1h Please think back to when you experienced [E1a] for [fixed line/BB]. How long do you think it would have been reasonable to wait until the first suitable appointment for an engineer to visit? Reasonable’ does not have to mean your ‘ideal’ situation, but one that would be generally satisfactory to you. Please give your answer in terms of calendar days. C2 And what would be an unacceptable length of time to wait? Please give your answer in terms of calendar days. landline/broadband installation n=990 / experienced provision n=232 / all asked hypothetical question n=758
Around half initially claim they would not accept a reduced price for a delayed install and a similar proportion would not pay more for a faster install.

SMEs: Installation of a new fixed line broadband service or landline service - Trade off scenarios

Unwilling to accept delayed install / reduction in price

- I wouldn't want an installation longer than 12 days: 61%
- The price decreases weren't enough to justify the longer installation: 56%
- Would expect it to be included: 2%

Price reduction would accept for 14 DAY installation

- £26.8 mean
- £20.0 median
- No price reduction = 18%

Unwilling to pay more for faster install

- I'm happy with a 12 day installation period: 42%
- The price increases were too much to justify the faster installation: 42%
- Would expect it to be included: 5%

Price would accept for 8 DAY installation

- Pay nothing extra = 77%
  (Base too small to show acceptable prices)

C3 Which of the following best describes why you would be unwilling to accept a slower installation at a cheaper price?
landline/broadband installation n=990  All with landline/broadband unwilling to accept slower installation n=604
C4 Which of the following best describes why you would be unwilling to pay a higher price for faster installation?
All with landline/broadband unwilling to pay high price for faster installation n=388
On average, 1 ½ days is considered an reasonable wait time for a fault to be fixed. Half a week (3.9 days) is considered to be unacceptable.

**SMEs: Loss of service to fixed line broadband service or landline service**

<table>
<thead>
<tr>
<th>Acceptable wait time for loss of service (days)</th>
<th>Unacceptable wait time for loss of service (days)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zero</td>
<td>Zero</td>
</tr>
<tr>
<td>1%</td>
<td>0%</td>
</tr>
<tr>
<td>One</td>
<td>One</td>
</tr>
<tr>
<td>65%</td>
<td>3%</td>
</tr>
<tr>
<td>Two</td>
<td>Two</td>
</tr>
<tr>
<td>22%</td>
<td>49%</td>
</tr>
<tr>
<td>Three</td>
<td>Three</td>
</tr>
<tr>
<td>7%</td>
<td>20%</td>
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<td>Four</td>
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<td>1%</td>
<td>5%</td>
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<td>Five</td>
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<td>5%</td>
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<td>Six</td>
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<td>0%</td>
<td>1%</td>
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<tr>
<td>Seven</td>
<td>Seven</td>
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<tr>
<td>1%</td>
<td>11%</td>
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<tr>
<td>8 or more</td>
<td>8 or more</td>
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<tr>
<td>0%</td>
<td>7%</td>
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<tr>
<td>Don’t know</td>
<td>Don’t know</td>
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<tr>
<td>1%</td>
<td>1%</td>
</tr>
</tbody>
</table>

All with landline/broadband

Acceptable wait time for loss of service (days)

<table>
<thead>
<tr>
<th>Zero</th>
<th>1%</th>
</tr>
</thead>
<tbody>
<tr>
<td>One</td>
<td>65%</td>
</tr>
<tr>
<td>Two</td>
<td>22%</td>
</tr>
<tr>
<td>Three</td>
<td>7%</td>
</tr>
<tr>
<td>Four</td>
<td>1%</td>
</tr>
<tr>
<td>Five</td>
<td>1%</td>
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<tr>
<td>Six</td>
<td>0%</td>
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<tr>
<td>Seven</td>
<td>1%</td>
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<tr>
<td>8 or more</td>
<td>0%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>1%</td>
</tr>
</tbody>
</table>

Mean 1.6
Median 1.0

Unacceptable wait time for loss of service (days)

<table>
<thead>
<tr>
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<th>0%</th>
</tr>
</thead>
<tbody>
<tr>
<td>One</td>
<td>3%</td>
</tr>
<tr>
<td>Two</td>
<td>49%</td>
</tr>
<tr>
<td>Three</td>
<td>20%</td>
</tr>
<tr>
<td>Four</td>
<td>5%</td>
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<td>Five</td>
<td>5%</td>
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<td>Six</td>
<td>1%</td>
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<td>Seven</td>
<td>11%</td>
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<tr>
<td>8 or more</td>
<td>7%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>1%</td>
</tr>
</tbody>
</table>

Mean 3.9
Median 2.0

All that have experienced BB/LL LoS

Mean 1.7
Median 1.0

All that have not experienced BB/LL LoS

Mean 1.5
Median 1.0

All that have experienced BB/LL LoS

Mean 4.2
Median 3.0

All that have not experienced BB/LL LoS

Mean 3.9
Median 2.0

C5b Please think back to when you experienced loss of service for [fixed line/BB/mobile]. How long do you think it would have been reasonable to wait for the fault to be fixed? ‘Reasonable’ does not have to mean your ‘ideal’ situation, but one that would be generally satisfactory to you. Please give your answer in terms of calendar days.

C6 And what would be an unacceptable length of time to wait? Please give your answer in terms of calendar days. landline/broadband installation n=990 / experienced loss of service n=339 / all asked hypothetical question n=651

Mean 1.6
Median 1.0

Mean 3.9
Median 2.0
3 in 5 claim they would not accept a reduced price for a delayed repair, whilst 1 in 3 would not pay more for a faster repair

SMEs: Loss of service to fixed line broadband service or landline service - Trade off scenarios

C7 Which of the following best describes why you would be unwilling to accept a slower repair time for a discount off your net bill?
landline/broadband installation n=990  All with landline/broadband unwilling to accept slower repair time n=705

C8 Which of the following best describes why you would be unwilling to pay a price for a faster repair?
All with landline/broadband unwilling to pay high price for faster installation n=339
Automatic compensation:
Consumer experience of provisioning delays, loss of service and missed appointments

Mobile Service Research:
Consumers
Mobile research: Consumer executive summary (1)

- Consumers have a greater reliance on mobile and broadband than Landline
  - 2 in 3 say their HH would struggle to function without these vs. 1 in 4 for landline
- Price is the dominant factor in the choice of mobile provider (67%). Data allowance (20%) and reliability (19%) are the next most important factors
- 1 in 10 (8%) experienced a loss of service in an area where they would normally get good coverage, in the last 12 months
  - Almost half (46%) reported this to their provider
  - On average, this LoS lasted for 3.3 days
- Loss of contactability (45%) was the key impact faced by households, along with inability to use apps (24%), negative impact on work activities (22%) and stress (19%)
- 77% of HHs experienced no direct financial costs, whilst 12% were unsure. Of the 11% that did experience costs, the average additional cost was c£8
- More than half did nothing to reduce the impact of their LoS
  - 29% used their landline to make calls and 14% used it to receive calls
  - 44% felt frustrated by the loss of service, 31% were annoyed and 30% stressed
- 59% tried to restore their mobile service, with 37% contacting their provider and 23% rebooting their device. On average consumers spent c3 days trying to get their mobile service fixed, although half (49%) spend no time at all
Mobile research: Consumer executive summary (2)

- Only 8% received compensation for their LoS, with 1% asking for it. Of those that did not receive compensation, 8% asked for it and 89% did not (3% didn’t know)

- After probing, 18% expect to be compensated for the impact of their LoS. On average, they expect c£13 - to be paid as a credit on their account or cash

- Three quarters (74%) describe their loss of mobile service as ‘very or fairly inconvenient’

- Half (50%) feel that regular progress updates from providers would be useful during a future loss of service
Greater reliance on Internet and Mobile than Landline. Two-thirds say household would “struggle to function” without these. Households feel they could cope just under a week without Internet (much longer for landline).

**Importance of telecoms services currently used**

- **Landline telephone**
  - My household would not find day to day activity impeded without this service: 22%
  - My household would rather the service was available but could manage without it: 29%
  - My household could manage but only for a limited period without it: 22%
  - My household would struggle to function without it: 27%

- **Fixed Internet connection**
  - My household would not find day to day activity impeded without this service: 3%
  - My household would rather the service was available but could manage without it: 8%
  - My household could manage but only for a limited period without it: 23%
  - My household would struggle to function without it: 66%

- **Mobile phone**
  - My household would rather the service was available but could manage without it: 6%
  - My household could manage but only for a limited period without it: 9%
  - My household would struggle to function without it: 20%

**Mean # days household able to cope without service**

- **Landline telephone**: 45.4 days
- **Fixed Internet connection**: 6.2 days
- **Mobile phone**: 10.5 days

*WAVE 2 CONSUMER: D1 Thinking again about your [landline / broadband / Mobile phone] service, how much does your household rely on each of these?* Base: All Consumers using landline/broadband/mobile phone n=1941/1794/1931
Price is the dominant factor in choice of provider across services. This is especially the case when it comes to Mobile services.

Main factors that influenced choice of provider (unprompted)

Price 68%
Bundled with other services 33%
Reliability 24%
Trusted brand 17%
Only one available in area at time 4%
Speed of installation 3%
Responsiveness to faults 3%
Customer service 2%
Can’t remember 4%

Price 62%
Bundled with other services 29%
Reliability 30%
Trusted brand 16%
Customer service 8%
Only one available in area at time 6%
Speed of installation 4%
Responsiveness to faults 1%
Can’t remember 1%

Base: All that have a landline but no fixed broadband and changed their provider in the last 10 years n=96; all that have a fixed broadband connection and changed their provider in the last 10 years n=1479, all with a mobile service n=1931
8% of mobile users have experienced loss of service in an area where they would normally get good coverage. Almost half reported this to their provider.

Experienced loss of voice and/or data services on mobile phone?

- No loss: 90%
- Loss of service*: 8%
- Error on bill: 2%
- Other: 1%

Reported to provider?

- Yes: 46%
In a third of cases the loss was fixed without a report to the provider; on average restoration of service was 3.3 days but a quarter of cases remained unresolved and for a fifth the same fault reoccurred following the fix.

Experience of loss of mobile service

**Reported to provider?**

- **YES 46%**

**What happened following loss of mobile service?**

- **Fixed first time**
  - 19%
- **Same fault happened again after fix**
  - 22%
- **Provider fixed without having to report**
  - 32%
- **Other**
  - 27%

**How long initially took to restore mobile service to normal?**

- **< one hour**
  - 10%
- **1-6 hours**
  - 26%
- **6-23 hours**
  - 5%
- **1 day**
  - 8%
- **Longer**
  - 16%
- **Unresolved**
  - 26%
- **Don’t know**
  - 10%

Mean: 3.3 days

---

WAVE 1 CONSUMER: E3b Which of the following best matches what happened following your loss of mobile service? E3a How long in total did it initially take to restore your mobile service to normal? Base: E3c Including the period of time before you reported the fault to your provider, how long in total were you without your mobile phone service? Base: All with mobile loss of service n=137
Loss of contactability was the key impact faced by households. When prompted, around a quarter mentioned inability to use apps and around a fifth a negative impact on work or increased anxiety/stress.

### Experience of loss of service

#### Household impacts (unprompted)

<table>
<thead>
<tr>
<th>Impact</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unable contact/be contacted</td>
<td>24</td>
</tr>
<tr>
<td>Poor reception/no service</td>
<td>8</td>
</tr>
<tr>
<td>Unable work/homework</td>
<td>7</td>
</tr>
<tr>
<td>Inconvenient/nuisance</td>
<td>6</td>
</tr>
<tr>
<td>Annoying</td>
<td>4</td>
</tr>
<tr>
<td>Worrying/upsetting/isolating</td>
<td>3</td>
</tr>
<tr>
<td>Frustrating</td>
<td>3</td>
</tr>
<tr>
<td>Unable go online</td>
<td>3</td>
</tr>
<tr>
<td>No effect on household</td>
<td>38</td>
</tr>
<tr>
<td>Don't know</td>
<td>1</td>
</tr>
</tbody>
</table>

#### Household impacts (prompted)

<table>
<thead>
<tr>
<th>Impact</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unable contact/be contacted</td>
<td>45</td>
</tr>
<tr>
<td>Unable to use mobile/tablet apps</td>
<td>24</td>
</tr>
<tr>
<td>Negative impact on work related activities</td>
<td>22</td>
</tr>
<tr>
<td>Increased anxiety/stress</td>
<td>19</td>
</tr>
<tr>
<td>Time to resolve loss of service</td>
<td>14</td>
</tr>
<tr>
<td>Unhappiness/arguments</td>
<td>12</td>
</tr>
<tr>
<td>Had to use different location</td>
<td>12</td>
</tr>
<tr>
<td>Increased landline bill</td>
<td>10</td>
</tr>
<tr>
<td>Unable complete household tasks</td>
<td>9</td>
</tr>
<tr>
<td>Negative impact study/homework</td>
<td>6</td>
</tr>
<tr>
<td>Had to use payphone</td>
<td>4</td>
</tr>
<tr>
<td>Increased mobile bill</td>
<td>3</td>
</tr>
<tr>
<td>Missed TV shows/catch up</td>
<td>3</td>
</tr>
<tr>
<td>Missed appointments</td>
<td>3</td>
</tr>
<tr>
<td>Other</td>
<td>9</td>
</tr>
<tr>
<td>No effect on household</td>
<td>17</td>
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<tr>
<td>Don't know</td>
<td>5</td>
</tr>
</tbody>
</table>
The majority of households experienced no direct financial costs as a result of their loss of service. Where they did face costs, these were an average of £7.80.

Experience of loss of service

Household impacts (prompted)

<table>
<thead>
<tr>
<th>Impact</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unable contact/be contacted</td>
<td>45</td>
</tr>
<tr>
<td>Unable to use mobile/tablet apps</td>
<td>24</td>
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<tr>
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<tr>
<td>Increased landline bill</td>
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<tr>
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<td>3</td>
</tr>
<tr>
<td>Missed appointments</td>
<td>3</td>
</tr>
<tr>
<td>Other</td>
<td>9</td>
</tr>
<tr>
<td>No effect on household</td>
<td>17</td>
</tr>
<tr>
<td>Don’t know</td>
<td>5</td>
</tr>
</tbody>
</table>

Direct financial costs of these impacts

- £7.80
- £11-50: 2%
- £50+: 5%
- No direct financial cost: 77%
- Don’t know: 12%

NB: bases are too small to split out the individual costs associated with particular issues.
More than half didn’t do anything to reduce the impact of their mobile service loss; using a landline to make/receive calls was the most likely action. Two-fifths felt frustrated by the loss of service. Annoyance and stress were outcomes for a third.

Experience of loss of mobile service

### Actions taken to reduce impact

- Used landline to make calls: 29%
- Used landline to receive calls: 14%
- Went/worked from other location: 9%
- Used (alternative) mobile: 9%
- Mobile wifi: 6%
- Used dongle: 1%
- Other: 8%
- Didn’t do anything: 52%

### How loss of service made you feel

- Frustrated: 44%
- Annoyed: 31%
- Stressed: 30%
- Cut off: 21%
- Angry: 18%
- Worried: 15%
- Not valued: 8%
- Ignored: 7%
- Not seriously affected: 16%
- Not negatively affected at all: 14%
Over a third contacted their provider (most by phone) in an attempt to fix or restore service their service. Around a quarter resorted to rebooting their device.

### Experience of loss of mobile service

**Actions taken to fix/restore service**

- [ ] Contacted provider: 37%
- [ ] Rebooted: 23%
- [ ] Asked a relative/friend: 16%
- [ ] Research to try fix issue by self: 12%
- [ ] Checked provider website for details: 11%
- [ ] Contacted Ofcom: 1%
- [ ] Used another company to try fix: 1%
- [ ] Other: 5%
- [ ] Didn't do anything: 41%

**Detail of contact made**

Of the 43 who contacted their provider, 32 did so via phone, 6 via email, 4 via webchat, 7 in another way.
On the whole, four in five were not prevented from working as a result of their loss of mobile service.

**Experience of loss of mobile service**

Prevented from working by loss of service (if use mobile for work)

- 1-5 hours: 7%
- 6-10 hours: 2%
- 11-25 hours: 2%
- Not prevented from working: 81%
- Don’t know: 7%

WAVE 1 E12a: As a result of your Loss of Mobile, were you prevented from working for any length of time? E12: Please indicate the number of hours you were prevented from working. Base: all loss of mobile service and use mobile for work purposes n=52* *CAUTION LOW BASE
On average people spent around 3 days trying to get their mobile service fixed, but around half spent no time at all. Very few had to wait in for an engineer visit.

**Time you/others spent trying to get service fixed**

- Up to 30 minutes: 8%
- 30 minutes to an hour: 9%
- 1-2 hours: 7%
- 2-5 hours: 4%
- More than 5 hours: 14%
- Don’t know: 9%
- Didn’t spend any time: 49%

**Mean:** 3.2 days

**Time you/others spent waiting in for engineer visits**

- 1-6 hours: 2%
- 1 day: 2%
- Longer: 4%
- Don’t know: 2%
- Didn’t spend any time: 90%

**Mean:** 9.5 hours

NB: This excludes the person claiming to spend 5,000 hours over a 6 month period.

WAVE 1 CONSUMER E12di How much time did you and other people in your household spend trying to get your mobile service fixed? Please think about all the things that you and others in your business spent time on to resolve the loss from the point at which the loss occurred until you had service again. This should include the time taken to contact your provider and any attempts to repair the service yourself. It should not include the time spent waiting for an engineer visit(s). E12di And how much time, if any, did you and other people in your household spend waiting in for an engineer visit or visits? Base: all with mobile loss of service n=113.
Fewer than one in ten received any compensation or temporary alternative services following the loss of mobile service.

**Experience of loss of mobile service**

**Received any compensation?**

- **NET compensation received**
  - Asked & received: 8%
  - Not asked but received: 7%
  - Asked & NOT received: 82%
  - NOT asked, NOT received: 1%
  - Don’t know: 1%

**Did provider offer any temporary alternative services?**

- **Regular progress updates**: 9%
- **Specific engineer appointment windows**: 1%
- **Other**: 1%
- **No**: 88%
- **Don’t know**: 3%

WAVE 1 CONSUMER: E19 Did you receive any compensation from your provider for this loss of service? Base: all mobile loss of service n=113 E20a/b Did you ask for compensation in regards to the loss of service or was it offered by your provider? Base: all mobile loss of service n=113 E28a Did your provider offer any temporary alternative services while your Mobile was/were out of service? What were they? Base: all loss of mobile service n=113
The vast majority neither asked for nor received compensation. Key rationale for not asking is that people don’t expect to get it or feel it’s not worth it.

**Experience of loss of mobile service**

Received compensation for loss of mobile service?

- **YES** 8%
- **NO** 92%

Ask for compensation?

- Asked 8%
- Did not ask 89%
- Don’t know 3%

Why not ask?

- Didn’t expect to get 28%
- Not worth it 25%
- Didn’t know how 19%
- Not provider’s fault 12%
- Forgot 3%
- Other 18%

*CAUTION LOW BASE*
Half wouldn’t expect any compensation for mobile loss of service of this nature; for most this was because the outage was short-lived.

Experience of loss of mobile service

Level of payment enough to compensate for impact

<table>
<thead>
<tr>
<th>Amount</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;£10</td>
<td>8%</td>
</tr>
<tr>
<td>&gt;£10</td>
<td>10%</td>
</tr>
<tr>
<td>Mean</td>
<td>£13.00</td>
</tr>
<tr>
<td>18%</td>
<td></td>
</tr>
</tbody>
</table>

Don't expect any compensation:
- Not long/quickly resolved: 34%
- Not provider fault: 20%
- Area fault: 10%
- Hassle/not bothered: 10%
- Don't expect it: 7%
- No financial loss: 6%
- Don't know how: 4%
- Other: 9%
- Don't know: 4%

WAVE 1 CONSUMER E25c How much, if anything, would you expect to receive as compensation to completely make up for the loss of service you experienced?
Base: All who experienced mobile loss of service n=113
E26 Why would you not expect to receive any compensation? Base: all not expecting to receive n=57 * CAUTION LOW BASE
Three quarters would describe their loss of mobile service as inconvenient. Half feel that regular progress updates from providers would be useful during a future loss of service.

**Experience of loss of mobile service**

<table>
<thead>
<tr>
<th>NET inconvenient</th>
<th>74%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very inconvenient</td>
<td>34%</td>
</tr>
<tr>
<td>Fairly inconvenient</td>
<td>40%</td>
</tr>
<tr>
<td>Not very inconvenient</td>
<td>19%</td>
</tr>
<tr>
<td>Not inconvenient at all</td>
<td>7%</td>
</tr>
</tbody>
</table>

**Perceived usefulness of concepts during loss of service**

- **Specific appointment windows**
  - Not at all useful: 21%
  - Not very useful: 36%
  - Fairly useful: 8%
  - Very useful: 11%
  - Don't know: 10%

- **Regular progress updates**
  - Not at all useful: 22%
  - Not very useful: 21%
  - Fairly useful: 7%
  - Very useful: 30%
  - Don't know: 19%

WAVE 1 CONSUMER E18b Which of the following best describes the impact of the loss of mobile service on your household? E29 To what extent would the following have been useful to you during your loss of service? Base: all with mobile loss of service n=113
Automatic compensation:
Consumer experience of provisioning delays, loss of service and missed appointments

Mobile Service Research:
SMEs
Mobile research: SME executive summary (1)

- Half (48%) feel business would struggle to cope without a mobile phone
- Price is the main factor affecting provider choice (47%). Larger SMEs (10+ employees) are less likely to cite this, and more likely to mention customer service (14%)
- 1 in 8 (12%) have experienced a loss of service in an area where they would normally get good coverage, in the past 12 months
  - Only a third (37%) reported this to their provider
  - On average, this LoS lasted for 4.3 days
  - 2 in 5 (41%) were satisfied with their providers ability to resolve the matter
- Loss of contactability (69%) was the key business impact, along with inability to receive enquiries (39%), time taken to resolve (38%) and the need to use of different location (33%)
- 63% of SMEs experienced no direct financial costs, whilst 22% were unsure. Of the 16% that experience additional costs, the average cost was c£380
- The LoS prevented people working in 14% of businesses. On average, 3 hours were lost across these businesses
- Half (47%) did nothing to reduce the impact of their LoS. 41% used their landline to make calls and 35% used it to receive calls
  - 47% felt frustrated by the LoS, 17% were angry and 16% annoyed
Mobile research: SME executive summary (2)

- 73% tried to restore their mobile service, with 40% contacting their provider or rebooting their device. 24% checked the provider website for updates.

- On average, SMEs spent 3½ hours trying to get their mobile service fixed, but half spent no time at all.

- Only 8% received compensation for their LoS, with no SME asking for it. Of those that did not receive compensation, 3% asked for it and 97% did not.

- 31% of SMEs expect to be compensated for the impact of their LoS. On average, they expect c90 - to be paid as a credit on their account or cash.

- More than half (55%) describe their loss of mobile service as ‘very or fairly inconvenient’

- Two thirds (63%) feel that regular progress updates from providers would be useful during a future loss of service.
Around half feel business would struggle to cope without a mobile phone

Importance of telecoms services currently used

- My business would not find day to day activity impeded without this service
  - 6% Landline telephone
  - 7% Fixed Internet connection
  - 11% Mobile phone

- My business would rather the service was available but could manage without it
  - 13% Landline telephone
  - 9% Fixed Internet connection
  - 17% Mobile phone

- My business could manage but only for a limited period without it
  - 28% Landline telephone
  - 25% Fixed Internet connection
  - 23% Mobile phone

- My business would struggle to function without it
  - 53% Landline telephone
  - 59% Fixed Internet connection
  - 48% Mobile phone

Mean # days business able to cope without service

- Landline telephone: 14.8 days
- Fixed Internet connection: 14.7 days
- Mobile phone: 20.3 days
Price dominates as the influencing factor in provider choice. Larger SMEs (10+ employees) are less likely to cite this, and more likely to cite mobile customer service (14%).

Main factors that influenced choice of provider (unprompted)

- **Price**: 59%
- **Reliability**: 23%
- **Trusted brand**: 20%
- **Broadband speed**: 15%
- **Customer service**: 11%
- **Bundled with other services**: 9%
- **Only one available in area at time**: 7%
- **Responsiveness to faults**: 3%
- **Speed of installation**: 1%
- **Other**: 3%
- **Can’t remember**: 4%

**Price**
- Only one available in area at time: 47%
- Reliability: 25%
- Voice call coverage: 22%
- Broadband speed: 17%
- Trusted brand: 13%
- Data coverage: 11%
- Customer service: 10%
- Data allowance: 9%
- Bundled with other services: 7%
- Voice call quality: 6%
- Only one available in area at time: 5%
- Broadband speed: 4%
- Choice of handsets: 5%
- Customer service: 3%
- Data allowance: 2%
- Bundled with other services: 2%
- Voice call quality: 2%
- Only one available in area at time: 1%
- Bundled with other services: 1%
- Voice call quality: 1%
- Other: 1%
- Can’t remember: 0%

- **Price**: 51%
- **Reliability**: 38%
- **Trusted brand**: 29%
- **Broadband speed**: 20%
- **Customer service**: 15%
- **Bundled with other services**: 9%
- **Only one available in area at time**: 7%
- **Responsiveness to faults**: 3%
- **Speed of installation**: 1%
- **Other**: 3%
- **Can’t remember**: 4%

**Price**
- Only one available in area at time: 47%
- Reliability: 25%
- Voice call coverage: 22%
- Broadband speed: 17%
- Trusted brand: 13%
- Data coverage: 11%
- Customer service: 10%
- Data allowance: 9%
- Bundled with other services: 7%
- Voice call quality: 6%
- Only one available in area at time: 5%
- Broadband speed: 4%
- Choice of handsets: 5%
- Customer service: 3%
- Data allowance: 2%
- Bundled with other services: 2%
- Voice call quality: 2%
- Only one available in area at time: 1%
- Bundled with other services: 1%
- Voice call quality: 1%
- Other: 1%
- Can’t remember: 0%

**Main factors that influenced choice of provider (unprompted)**

**SME: C2a/b/c. Thinking back to when you chose your (service), what were the main factors that influenced your choice of provider?**

**Base:** All that have a landline but no fixed broadband and changed their provider in the last 10 years n=72; all that have a fixed broadband connection and changed their provider in the last 10 years n=635, all with a mobile service n=577
12% of SME mobile users have experienced loss of service in an area where they would normally get good coverage. Over a third reported this to their provider.

**Experienced loss of voice and/or data services on mobile phone?**

- No loss: 86%
- Loss of service*: 12%
- Error on bill: 1%
- Other: 1%

**Reported to provider?**

- 12% loss
- YES 37%

*Loss of service in an area where you would normally get good coverage, for more than 1 hour. E2b Did you report your mobile phone loss of service to your provider? Base: all mobile loss of service n=122
In more than a third of cases the loss was fixed without a report to the provider; a fifth of cases remained unresolved and for a fifth the same fault reoccurred following the fix.

Experience of loss of mobile service

Reported to provider?

YES 37%

What happened following loss of mobile service?

- Fixed first time: 19%
- Same fault happened again after fix: 18%
- Provider fixed without having to report: 38%
- Other: 24%

How long initially took to restore mobile service to normal?

- < one hour: 1%
- 1 hour: 12%
- 2-4 hours: 23%
- 5-14 hours: 11%
- Longer: 24%
- Unresolved: 18%
- Don’t know: 12%

Mean: 4.3 days

SME: E2b Did you report your mobile loss of service to your provider? E3b Which of the following best matches what happened when you reported your loss of mobile service? E3a How long in total did it initially take to restore your mobile service to normal? Base: all with mobile loss of service n=120
Overall two-fifths are satisfied but a third are dissatisfied with their provider’s ability to resolve their mobile loss of service (larger SMEs more polarised)

Experience of loss of mobile service

Satisfaction with provider ability to resolve loss of service

<table>
<thead>
<tr>
<th>NET Satisfied</th>
<th>41%</th>
<th>41%</th>
<th>46%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very satisfied</td>
<td>19%</td>
<td>20%</td>
<td>14%</td>
</tr>
<tr>
<td>Fairly satisfied</td>
<td>22%</td>
<td>21%</td>
<td>32%</td>
</tr>
<tr>
<td>Neither</td>
<td>20%</td>
<td>21%</td>
<td>7%</td>
</tr>
<tr>
<td>Fairly dissatisfied</td>
<td>16%</td>
<td>17%</td>
<td>5%</td>
</tr>
<tr>
<td>Very dissatisfied</td>
<td>17%</td>
<td>16%</td>
<td>33%</td>
</tr>
<tr>
<td>Don’t know/na</td>
<td>6%</td>
<td>5%</td>
<td>10%</td>
</tr>
</tbody>
</table>

SME: E5 Overall, how satisfied or dissatisfied were you with your provider’s ability to resolve this loss of service? Base: all mobile loss of service n=122, 1-9 employees n=77*, 10-249 employees n=45* CAUTION LOW BASE
Loss of contactability to/from customers was the key business impact

### Experience of loss of service

#### Business impacts (unprompted)

<table>
<thead>
<tr>
<th>Impact</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customers unable contact us</td>
<td>14</td>
</tr>
<tr>
<td>Unable contact customers</td>
<td>12</td>
</tr>
<tr>
<td>Loss earnings/business/hours</td>
<td>9</td>
</tr>
<tr>
<td>Unable function/operate</td>
<td>9</td>
</tr>
<tr>
<td>Unable make outgoing calls</td>
<td>6</td>
</tr>
<tr>
<td>Had work from different location</td>
<td>5</td>
</tr>
<tr>
<td>Unable receive emails</td>
<td>3</td>
</tr>
<tr>
<td>Unable sell/deliver products/services</td>
<td>2</td>
</tr>
<tr>
<td>Unable contact staff</td>
<td>2</td>
</tr>
<tr>
<td>No impact</td>
<td>47</td>
</tr>
<tr>
<td>Don't know</td>
<td>5</td>
</tr>
</tbody>
</table>

#### Business impacts (prompted)

<table>
<thead>
<tr>
<th>Impact</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unable contact/be contacted</td>
<td>69</td>
</tr>
<tr>
<td>Unable receive enquiries</td>
<td>46</td>
</tr>
<tr>
<td>Took time to resolve loss service</td>
<td>38</td>
</tr>
<tr>
<td>Had use different location</td>
<td>33</td>
</tr>
<tr>
<td>Unable sell products/services</td>
<td>20</td>
</tr>
<tr>
<td>Unable work from a location</td>
<td>16</td>
</tr>
<tr>
<td>Unable buy products/services</td>
<td>14</td>
</tr>
<tr>
<td>Unable access/process payments</td>
<td>14</td>
</tr>
<tr>
<td>Unable access files on network</td>
<td>13</td>
</tr>
<tr>
<td>Missed/rearranged meetings</td>
<td>12</td>
</tr>
<tr>
<td>Increased landline bill</td>
<td>12</td>
</tr>
<tr>
<td>No impact</td>
<td>16</td>
</tr>
</tbody>
</table>

NB: Sample for 10-249 employees only 31 so can’t be shown
The majority of SMEs experienced no direct financial costs as a result of their loss of service. Where they did face costs, these were an average of £382.

Experience of loss of service

<table>
<thead>
<tr>
<th>Business impacts (prompted)</th>
<th>Direct financial costs of these actions*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unable contact/be contacted</td>
<td>£1-£20: 5%</td>
</tr>
<tr>
<td>Increased landline bill</td>
<td>£21-£250: 6%</td>
</tr>
<tr>
<td>No impact</td>
<td>£251-£999: 0%</td>
</tr>
<tr>
<td>Had use different location</td>
<td>£1,000+: 5%</td>
</tr>
<tr>
<td>Increased landline bill</td>
<td>No direct financial cost: 63%</td>
</tr>
<tr>
<td>Unable receive enquiries</td>
<td>Don’t know: 22%</td>
</tr>
<tr>
<td>Unable work from a location</td>
<td></td>
</tr>
<tr>
<td>Unable buy products/services</td>
<td></td>
</tr>
<tr>
<td>Unable sell products/services</td>
<td></td>
</tr>
<tr>
<td>Unable access/files on network</td>
<td></td>
</tr>
<tr>
<td>Missed/rearranged meetings</td>
<td></td>
</tr>
<tr>
<td>Increased landline bill</td>
<td></td>
</tr>
</tbody>
</table>

SME E7 Which, if any, of the following would you say applied to your most recent loss of mobile service? Base: all with loss of mobile service n=90*

E8 Thinking about the factors you mentioned, what were the direct financial costs to your business for all of the following because of your most recent loss of mobile service? Still thinking about the direct financial costs to your business. If there were any other direct financial costs not included in the factors mentioned previously, could you please indicate the amount of these costs below? Base: all with loss of mobile service n=90* *CAUTION LOW BASE

NB: bases are too small to split out the individual costs associated with particular issues.
The loss of service prevented staff in 1 in 7 SMEs from working, however, number of hours lost was relatively low.

**Experience of loss of mobile service**

**People prevented from working by loss of service**

- None prevented from working: 83%
- 1 to 4: 14%
- Don't know: 2%

**Working hours lost as result of loss mobile service**

- None: 62%
- 1 hour: 3%
- 2-4 hours: 14%
- Longer: 13%
- Don't know: 9%

**Mean**: 2.9 hours
Most likely action to reduce the impact was to use landline for calls. Almost half say the loss of mobile service left them feeling frustrated.

**Experience of loss of mobile service**

### Actions taken to reduce impact

- Used landline to make calls: 41%
- Used landline to receive calls: 35%
- Went/worked from other location: 7%
- Used alternative mobile: 14%
- Mobile wifi: 7%
- Used back up Internet connection: 2%
- Contacted third party to provide services: 2%
- Other: 1%
- Didn't do anything: 47%

### How loss of service made you feel

- Frustrated: 47%
- Angry: 17%
- Annoyed: 16%
- Stressed: 13%
- Worried: 6%
- Ignored: 2%
- Cut off: 1%
- Not seriously affected: 12%
- Not negatively affected at all: 12%

*SME: E13 What, if anything did you do to reduce the impact of this mobile phone loss of service?  
E18a How did this mobile phone loss of service make you feel? Base: all answering on mobile loss of service n=90* CAUTION LOW BASE*
Two fifths contacted their provider or rebooted - and a further quarter checked their provider website for details. Contact was mainly via telephone (72%), although 1 in 5 (19%) used webchat or email (17%).

Experience of loss of mobile service

Actions taken to fix/restore service
- Contacted provider: 40%
- Rebooted: 40%
- Checked provider website for details: 24%
- Research to try fix issue by self: 21%
- Asked a relative/friend: 4%
- Contacted Ofcom: 2%
- Used another company to try fix: 2%
- Other: 7%
- Didn't do anything: 27%

Detail of contact made
- Phone: 72%
- Webchat: 19%
- Email: 17%
- Other: 5%
More than half spent no time trying to get their mobile service fixed and no one spent time waited in for an engineer.

**Experience of loss of mobile service**

**Time you/others spent trying to get service fixed**

- < 1 hour: 16%
- 1-2 hours: 10%
- 2-4 hours: 5%
- Longer: 12%
- Don't know: 6%
- Didn't spend any time: 51%

**Mean**: 3 ½ hours

**Time you/others spent waiting in for engineer visits**

- Didn't spend any time: 97%
- Don't know: 2%

E12di How much time did you and other people in your business spend trying to get your mobile service fixed? Please think about all the things that you and others in your business spent time on to resolve the loss from the point at which the loss occurred until you had service again. This should include the time taken to contact your provider and any attempts to repair the service yourself. It should not include the time spent waiting for an engineer visit(s). E12di And how much time, if any, did you and other people in your business spend waiting in for an engineer visit or visits? Base: All answering on mobile loss of service n=90*  
*CAUTION LOW BASE
Fewer than one in ten received any compensation

Experience of loss of mobile service

Received any compensation?

- Did you receive any compensation from your provider for this loss of service? 
- Did you ask for compensation in regards to the loss of service or was it offered by your provider? 

Did provider offer any temporary alternative services?

- Did your provider offer any temporary alternative services while your Mobile was/were out of service? What were they?

NET compensation received

- 8% Asked & received
- 3% Not asked but received
- 89% Asked & NOT received
- 0% NOT asked, NOT received
- 0% Don't know

SME: E19 Did you receive any compensation from your provider for this loss of service? E20a/b Did you ask for compensation in regards to the loss of service or was it offered by your provider? Base: all answering on mobile loss of service n=90*

E28a Did your provider offer any temporary alternative services while your Mobile was/were out of service? What were they? Base: all loss of mobile service n=90*

*CAUTION LOW BASE
**Experience of loss of mobile service**

<table>
<thead>
<tr>
<th>Received compensation for loss of mobile service?</th>
<th>Asked</th>
<th>Not asked</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asked for compensation?</td>
<td>3%</td>
<td>97%</td>
</tr>
<tr>
<td>Did not ask</td>
<td>8%</td>
<td>92%</td>
</tr>
</tbody>
</table>

**Why not ask?**

- Not worth it: 33%
- Didn’t expect to get: 20%
- Not provider fault: 8%
- Forgot: 7%
- Minor issue: 7%
- Didn’t know how: 4%
- Issue unresolved: 3%
- Not bothered: 3%
- Too busy: 3%
- Never thought of it: 1%
- Other: 13%

SME: E19 Did you receive any compensation from your provider for this loss of service? E20a/b Did you ask for compensation in regards to the loss of service or was it offered by your provider? Base: all answering on mobile loss of service n=90* E21 Why did you not ask for compensation? Base: all who didn’t ask for compensation n=82* *CAUTION LOW BASE
After probing, a third expect some form of compensation for a loss of mobile service.

### Experience of loss of mobile service

#### Level of payment enough to compensate for impact

<table>
<thead>
<tr>
<th>Payment Range</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>£1-10</td>
<td>8%</td>
</tr>
<tr>
<td>£11-25</td>
<td>7%</td>
</tr>
<tr>
<td>£26-50</td>
<td>8%</td>
</tr>
<tr>
<td>£50-75</td>
<td>1%</td>
</tr>
<tr>
<td>£75+</td>
<td>7%</td>
</tr>
<tr>
<td>Wouldn’t expect any</td>
<td>42%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>27%</td>
</tr>
</tbody>
</table>

Mean: £89

*CAUTION LOW BASE*
More than half found their loss of mobile service to be inconvenient. More than 6 in 10 would find regular progress updates useful.

Experience of loss of mobile service

![Experience of loss of mobile service chart]

Perceived usefulness of concepts during loss of service

![Perceived usefulness chart]

SME E18b Which of the following best describes the impact of the loss of mobile service on your business? E29 To what extent would the following have been useful to you during your loss of service?

Base: all answering on mobile loss of service n=90* *CAUTION LOW BASE
Automatic compensation:

Minimum standards & willingness to pay more/less for better/worse service: Consumers & SMEs
11 hours is considered the maximum reasonable wait time for a fault to be fixed on a mobile service. Around a day (23.7 hours) is considered to be unacceptable.

CONSUMERS: Loss of service on mobile phone service

**Acceptable wait time for loss of service (hours)**

<table>
<thead>
<tr>
<th></th>
<th>All with Mobile</th>
<th>Zero</th>
<th>1-2 hours</th>
<th>3-4 hours</th>
<th>5-7 hours</th>
<th>8-23 hours</th>
<th>24 hours</th>
<th>25-36 hours</th>
<th>37-48 hours</th>
<th>Longer</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mean</td>
<td>11.0</td>
<td>2%</td>
<td>33%</td>
<td>15%</td>
<td>12%</td>
<td>12%</td>
<td>19%</td>
<td>2%</td>
<td>5%</td>
<td>1%</td>
<td>0%</td>
</tr>
<tr>
<td>Median</td>
<td>5.0</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Unacceptable wait time for loss of service (hours)**

<table>
<thead>
<tr>
<th></th>
<th>All with Mobile</th>
<th>Zero</th>
<th>1-2 hours</th>
<th>3-4 hours</th>
<th>5-7 hours</th>
<th>8-23 hours</th>
<th>24 hours</th>
<th>25-36 hours</th>
<th>37-48 hours</th>
<th>Longer</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mean</td>
<td>23.7</td>
<td>0%</td>
<td>10%</td>
<td>13%</td>
<td>15%</td>
<td>16%</td>
<td>14%</td>
<td>10%</td>
<td>14%</td>
<td>9%</td>
<td>1%</td>
</tr>
<tr>
<td>Median</td>
<td>12.0</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

C10 Please think back to when you experienced a loss of service for your mobile phone service. How long do you think it is reasonable for the maximum wait until your provider has successfully resolved the fault? ‘Reasonable’ does not have to mean your ‘ideal’ situation, but one that would be generally satisfactory to you. Please give your answer in terms of hours. C11 And what would be an unacceptable length of time to wait? Again, please give your answer in terms of hours.

Mobile loss of service n=1872 / experienced loss of mobile service n=137 / hypothetical loss of mobile phone n=1735
14 hours is considered the maximum reasonable wait time for a fault to be fixed on a mobile service. 30 hours is considered to be unacceptable.

**SMEs: Loss of service on mobile phone service**

<table>
<thead>
<tr>
<th>Acceptable wait time for loss of service (hours)</th>
<th>Unacceptable wait time for loss of service (hours)</th>
</tr>
</thead>
<tbody>
<tr>
<td>All with Mobile</td>
<td>All with Mobile</td>
</tr>
<tr>
<td>Zero</td>
<td>Zero</td>
</tr>
<tr>
<td>1-2 hours</td>
<td>1-2 hours</td>
</tr>
<tr>
<td>3-4 hours</td>
<td>3-4 hours</td>
</tr>
<tr>
<td>5-7 hours</td>
<td>5-7 hours</td>
</tr>
<tr>
<td>8-23 hours</td>
<td>8-23 hours</td>
</tr>
<tr>
<td>24 hours</td>
<td>24 hours</td>
</tr>
<tr>
<td>25-36 hours</td>
<td>25-36 hours</td>
</tr>
<tr>
<td>37-48 hours</td>
<td>37-48 hours</td>
</tr>
<tr>
<td>Longer</td>
<td>Longer</td>
</tr>
<tr>
<td>Don’t know</td>
<td>Don’t know</td>
</tr>
</tbody>
</table>

Mean 13.9  
Median 6.0  
Mean 21.4  
Median 12.0

C10 Please think back to when you experienced a loss of service for your mobile phone service. How long do you think it is reasonable for the maximum wait until your provider has successfully resolved the fault? ‘Reasonable’ does not have to mean your ‘ideal’ situation, but one that would be generally satisfactory to you. Please give your answer in terms of hours.  
C11 And what would be an unacceptable length of time to wait? Again, please give your answer in terms of hours.  
Mobile loss of service n=639 / experienced loss of mobile service n=101 / hypothetical loss of mobile phone n=538

<table>
<thead>
<tr>
<th>All that have experienced mobile LoS</th>
<th>All that have not experienced mobile LoS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mean 9.7</td>
<td>Mean 14.8</td>
</tr>
<tr>
<td>Median 4.0</td>
<td>Median 6.0</td>
</tr>
</tbody>
</table>

Mean 30.0  
Median 24.0
Extra analysis

Fixed Line Research: Consumers
On average 9.8 days to service activation for any service. 92% said this was in line with provider information and 87% felt the time taken was reasonable.

**Scenario last time changed or upgraded service (any service)**

- No existing service: 6%
- Change/upgrade existing provider, service maintained: 27%
- Change/upgrade existing provider, temporary loss service: 9%
- Switch to new provider, temporary loss service: 21%
- Switch to new provider, service maintained: 36%
- Switch to new provider, service loss due to own choices: 4%
- Other/DK: 6%

**Service activation/upgrade (days)**

- Mean (days): 9.8
- In line with time period given by provider?: 92%
- Reasonable timing?: 87%

Of those who said no, the mean for a reasonable time was 5.2 days.

E2 Which of these scenarios applied to the last time you changed or upgraded your service? Base: All Consumer that have changed (any service) in the last 5 years n=856
E3 Did you move home at the same time? Base: All not 'other/dk' at E2 n=808
E4 Did the change or upgrade require an engineer to visit your home to install new lines or other equipment? Base: All not 'no existing service' 'service loss due to own choices' or 'other/dk' at E2 n=522
E5 Approximately how many calendar days after placing the order was the service activated or upgraded? Base: all that had a new service n=758 (not including other/dk or those without service due to own choices at E2).
E5b And was this in line with the time period you had been given by your provider? E6a Do you think the time it took was reasonable? Base: All where service activated n=522
Overall, a quarter (28%) did not have an existing service at their property, a quarter (25%) changed or upgraded with their existing provider and a third (36%) switched to a new provider.

Scenario last time changed or upgraded service (any service)

- No existing service: 28%
- Change/upgrade existing provider, service maintained: 21%
- Change/upgrade existing provider, temporary loss service: 9%
- Switch to new provider, temporary loss service: 4%
- Switch to new provider, service maintained: 27%
- Switch to new provider, service loss due to own choices: 6%
- Other/DK: 6%

Overall, a quarter (28%) did not have an existing service at their property, a quarter (25%) changed or upgraded with their existing provider and a third (36%) switched to a new provider.

E2 Which of these scenarios applied to the last time you changed or upgraded your service? Base: All that have changed (any service) in the last 5 years n=856; All where service activation/upgrade was NOT in line with the time period given by their provider (excluding those who say service loss to own choice or DK at E2 which is why those codes then don’t appear) n=101