



Switching mobile network provider The Consumer Experience

Final report

February 2016

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Background



- Ofcom's principal remit is to further the interests of consumers by promoting competition. Its specific remit for switching processes is concerned with the consumer *experience* of switching and includes the importance of . . .
 - Switching quickly and conveniently
 - Switching without loss of service
 - Being properly informed about the implications of the decision to switch
 - Being protected from being switched against their will
- In June 2015, Ofcom commissioned Futuresight to conduct qualitative research to understand the consumer experience of mobile network switching (and the types of difficulties that consumers face when trying to switch provider) in each of the following contexts:
 - Where an existing losing-provider-led (LPL) process applies, i.e., when the consumer wishes to port their number and must therefore obtain a port authorisation code (PAC) from their current provider
 - Where no switching process exists, when the consumer has no wish to port their number and is required to coordinate the end of service with one provider and start of service with a new provider, i.e. 'cease and re-provide' (C&R)
- This report presents the findings of the research study

Research objectives - overall



- The **overall** objectives¹ of this study were to identify and understand:
 - Factors that have the greatest impact on the decision to switch or not to switch
 - Any difficulties when switching or trying to switch
 - How, and to what extent, any difficulties in switching are linked to current processes / arrangements (LPL PAC and C&R) and any non-process barriers
 - Behaviour and preferences in relation to losing-provider discussions
 - Satisfaction with the decision to switch or not to switch
 - Perceived strengths and weaknesses of the current LPL process
 - Reactions to some GPL scenarios²

¹ Please see Appendix 1 for a full description of the objectives, complete with the topic guides used in this research

² GPL = Gaining provider led, whereby the consumer contacts a new provider (the 'gaining provider') rather than their existing provider, to lead and manage the switch on their behalf. Please see Appendix 2 for a full description of the GPL scenarios shown to participants

Research objectives - specifically



- Specifically, among switchers and those deciding not to switch, there was a need to understand:

Switching:

- The extent that save activity³ was welcomed, or a difficulty that switchers had to overcome
- Their experience of the PAC process
- Difficulties, if any, in obtaining a PAC, or the experience of C&R
- Experiences, if any, of trying to coordinate PAC requests⁴

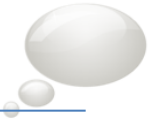
Deciding not to:

- The impact and triggers of any save activity, and whether welcomed
- Whether save activity is a key factor in the decision not to switch
- Any current provider or potential new provider behaviour that was interpreted as 'frustrating the process'

³ We define 'save activity' as an attempt (or attempts) by a current provider to retain the customer, at or around the time when the customer has stated an intention to leave or sought to cancel

⁴ Coordination of notice periods and PAC expiry date, to minimise or avoid gaps in service or 'double billing'

Method and sampling



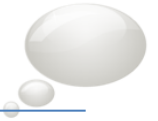
- A qualitative approach was taken, combining a series of introductory and reconvened focus group discussions with the use of an interactive online diary
- A total of 120 people participated in the study across four stages:

Stage 1:	12 x 40 min focus groups (10 per group)	Meeting and briefing for stage 2
Stage 2:	In-the-moment reporting	Online diary capture ⁵
		Online diary interaction
Stage 3:	90 min reconvened focus groups	In-depth assessment of switching experiences
Stage 4:	Follow-up telephone interviews	In-depth assessment among those not completed in time for Stage 3

- The participants were drawn from all four nations of the UK, living in both urban and rural locations
- The fieldwork was conducted between June and November 2015

⁵ A paper-based version of the diary was provided for n=3 participants who were not online

Sample definition⁶



- All participants in the study were consumers who were:
 - The principal decision-maker for their mobile network provider
 - Actively seeking to switch their mobile network provider
 - Either out of contract or nearing the end of their contract, and actively looking to switch their mobile network provider
 - Not working or involved in any way in the communications services industry (including close members of family)
- The sample reflected a good balance of ages, life-stages and male to female ratio
- All in the sample were currently either post-pay⁷ or pre-pay (PAYG) customers of:
 - EE, including T-Mobile and Orange (n=30)
 - O2 (n=25)
 - Tesco Mobile (n=10)
 - Three (n=20)
 - Virgin Mobile (n=10)
 - Vodafone (n=25)

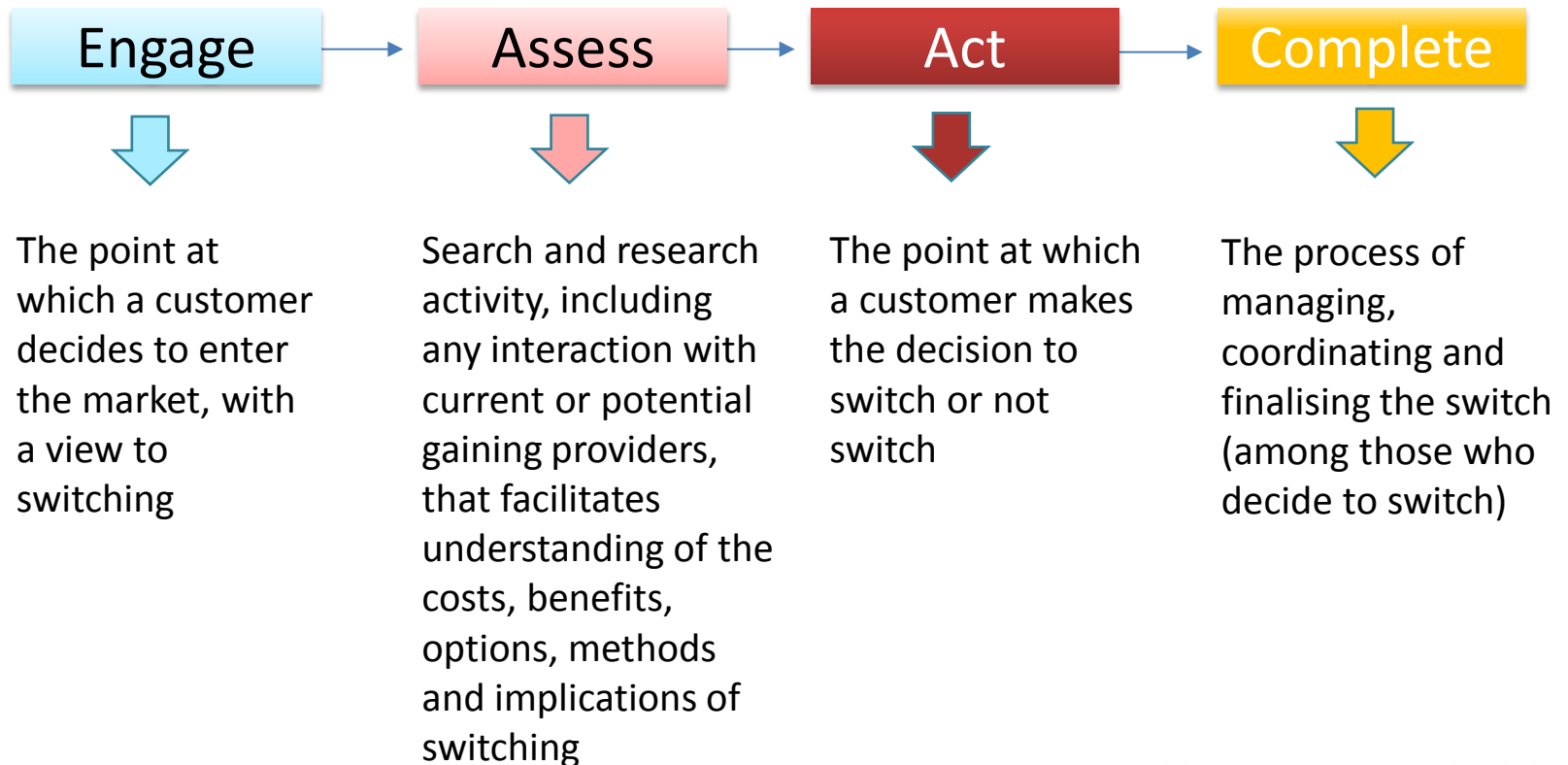
⁶ Please see Appendix 3 for the sample screeners used in the research

⁷ Post-pay: Either 18/24 term including handset, or 12 month rolling SIM-only

The customer journey



- The main findings of this study relate to consumer experiences at four key stages of the customer's journey. These stages are summarised as follows:



A note on the method

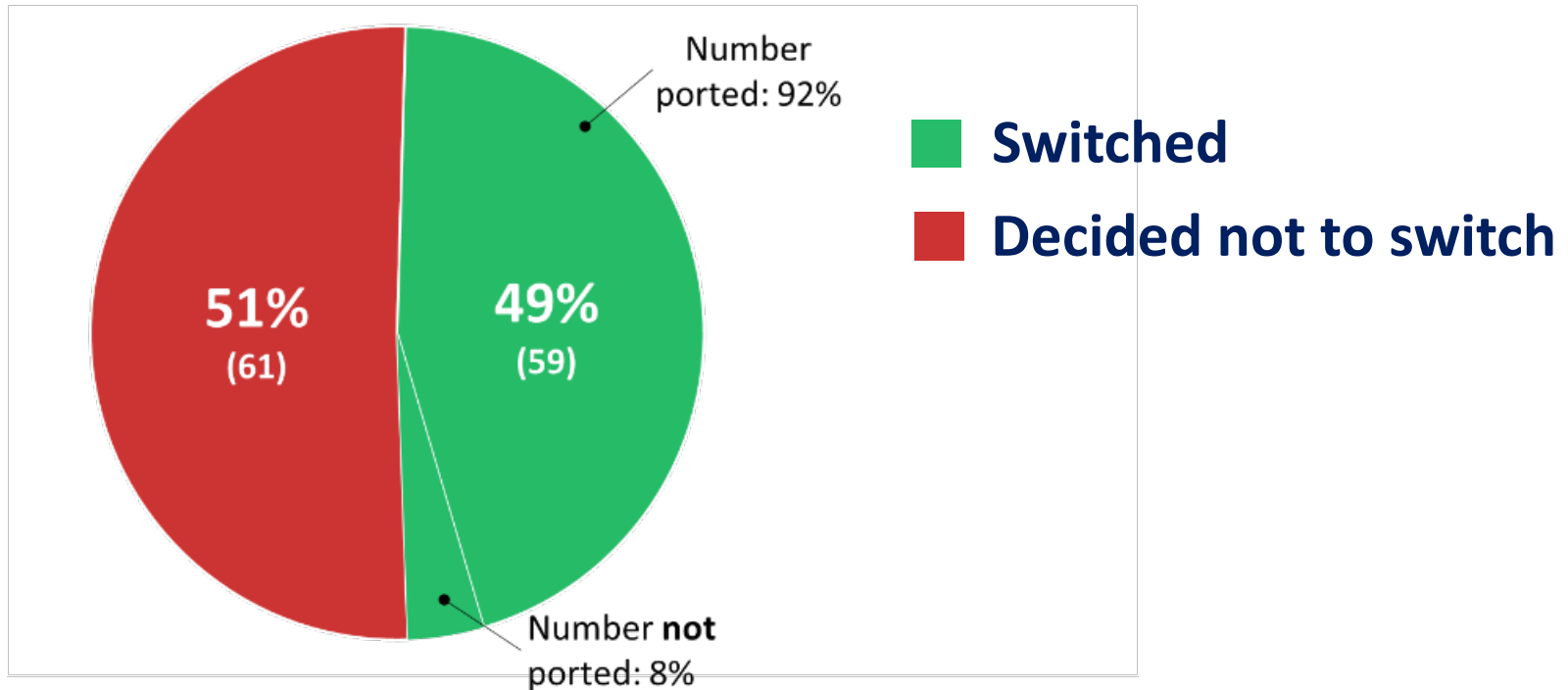


- It is important to note that the findings of this report are not statistically representative of the views of the general public
- Qualitative research is designed to be illustrative, detailed and exploratory and provides insight into the perceptions, feelings and behaviours of people rather than conclusions drawn from a robust, quantifiably valid sample
- Percentages and quantifiers, such as ‘most’, ‘few’, ‘some’, etc., used in this report must be treated as descriptions of the sample, and should not be interpreted conclusively as actual proportions or incidence levels in the market
- This qualitative report should be read in conjunction with Ofcom’s quantification (see: *Ofcom Mobile Switching Quantitative Research*, September 2015). References to this quantitative research are made in this report when relevant

Sample - switching outcomes



Around half of the sample switched:



Base: total sample: n=120

Caution: %'s are descriptions of this qualitative sample, and should not be interpreted conclusively as actual incidence levels in the market



Executive Summary

Executive Summary



Overview:

- Around half of the sample (49%) switched their mobile provider. The remaining half (51%) decided not to
- Among the 51% who decided not to switch, most did not switch for two main reasons. . .
 - They were put off during **assessment**, where they spent an undue amount of time, ‘hassle’ and difficulty in understanding their needs
 - At the time of weighing up options and making a decision (Act), their current provider offered them a deal that they accepted. Their decision to accept this deal was often influenced by the amount of perceived risk, hassle, difficulty and awkwardness in leaving their current provider

Executive Summary



- Difficulty and ‘hassle’ was experienced in a variety of ways. Key mentions were:
 - Time and difficulty in understanding tariffs and making like-for-like comparisons
 - Difficulty in understanding what was actually needed (i.e., in terms of minutes, texts and particularly data) in relation to what was being offered
 - Perceived ‘risk’ in entering and being tied to an extended contract, prior to being able to fully determine whether the phone, tariff and network service was suitable
 - Waiting time to get through to their current provider in order to cancel (and further waiting time when being passed to ‘retention’ departments)
 - Finding it ‘awkward’ and sometimes daunting when cancelling, and, during save attempts, feeling under an obligation to ‘have to defend’ their decision to leave
 - Having to manage the transfer themselves, by either obtaining and transferring their PAC or cancelling and setting up with a new provider

Executive Summary



- Current processes can be seen to act as a barrier to switching. This was most evident among the less confident in the sample and at the time of weighing up options and making a decision (**Act**)
- Specifically, the requirement to contact their current provider (to cancel and port) was often seen (and reported) to:
 - Add to perceived ‘hassle’, effort and difficulty
 - Increase the effect of save activity and perception of gain by staying
 - Increase the perceived level of gain required from potential new providers to switch
 - Encourage some to consider that changing their number was comparatively easier than keeping their existing one
 - Puts many off from switching altogether, given the **perceived** time and hassle involved
- Other difficulties were evident after the decision to switch. These related mainly to:
 - Billing overlap (difficulty of coordination)
 - Gaps in service (difficulty of coordination and porting delays)

Executive Summary



- The approach taken by consumers, and their attitude to switching varied across the sample. Three main in-going mind-sets were identified:
 - **Determined** to switch
 - **Minded to negotiate** (with their current provider)
 - **Uncertain & doubtful** (about the likely success of switching)
- Typically, the more strongly determined were most likely to switch. This was mainly by virtue of greater confidence, tech-savviness, prior experience (in switching) and skill in navigating the market
- Those **minded to negotiate** and particularly the **uncertain & doubtful** were, by comparison, less likely to switch. This was by virtue of less confidence *per se*, and the acceptance of an offer from their existing provider

Executive Summary



Engagement

(The point at which a customer decides to enter the market, with a view to switching)

- The sample was unified at the outset, by an enthusiasm for wanting to switch
- Key reasons for initial engagement relate in the main to 'reactive' factors, e.g., a 'problem' or 'complaint' with the service quality, customer service and / or cost
- There was relatively very little drop-out at this initial stage

Executive Summary



Assessment

(Search and research activity, including any interaction with current or potential gaining providers, that facilitates understanding of the costs, benefits, options, methods and implications of switching)

- Very different approaches to assessing were evident by the three main in-going mind-sets identified. Typically:
 - Those **determined** to switch demonstrated the most linear, clear-sighted, purposeful and goal-driven approach, over the shortest time-frame, with a strong focus on interaction with potential new providers
 - Those who were **minded to negotiate** demonstrated more of an iterative approach, to-ing and fro-ing between their current provider and new providers, with the aim to negotiate the best deal, ideally with their current provider (in order to avoid the perceived ‘hassle’ and ‘risk’ of switching)
 - The less confident in the sample (**uncertain & doubtful**) reported most difficulty, with what we observed to be a more time-consuming, inefficient, ‘haphazard’, unfocused approach. This often led to higher perceptions of risk, lower perceptions of choice and greater receptivity to ‘save’ offers from their current provider
- Drop-out was more evident at this stage, compared to the initial stage of engagement

Executive Summary



Act

(The point at which a customer weighs up their options and makes the decision to switch or not)

- Key difficulties at this decision-making stage, relate to the requirement to contact their current provider (to cancel and port their number)
- The main difficulties reported were:
 - Time required to ‘get through’
 - Time and ‘hassle’ when dealing with their current provider’s retention team
 - Difficulty, ‘awkwardness’ and ‘hassle’ in overcoming (and rejecting) providers’ ‘save’ attempts
- These difficulties had the greatest impact on the less confident, in their decision not to switch
- Drop out was relatively very substantial at this stage, compared to the previous stages of Engage and Assess

Executive Summary



In-going perceptions of the switching process

- In-going perceptions varied across the sample
- Many of the less confident (**uncertain & doubtful**) who decided to switch:
 - Claimed to know little, if anything, about what to expect, or how long the process of switching would take
 - Tended to ‘imagine’ that switching would be more difficult and lengthy than it actually was
 - In some cases, claimed to be unsure whether it was possible to keep their number (expecting instead to have to change their number)
- Many of the more confident (**determined**) either drew on past experience or claimed to have researched the ‘process’ prior to their decision to switch. Typically, they claimed to:
 - Find that the the actual experience was broadly in line with what they expected, i.e., either ‘very’ or ‘fairly easy’
 - Be better prepared and planned to manage and ‘cope’ with any difficulty or delay (e.g., by making use of a temporary number)

Executive Summary



The switching experience and completion

(The process of managing, coordinating and finalising the switch, among those who decide to switch)

- The majority of switchers (around 9 out of 10) claimed:
 - That they wished to keep their number
 - That the PAC process was ‘easy’ or at least ‘easier than expected’
- A minority (around 1 in 10) reported that the PAC process was ‘difficult’ or ‘more difficult than expected’
- Among this minority in particular, current processes appear to incur additional costs (in terms of time, effort and money), via . . .
 - Difficulties with timing / coordination
 - Time and planning required to avoid ‘gaps’ and particularly billing ‘overlaps’
- Some among the majority who claimed that the process was ‘easy’ incurred costs due to billing overlaps

Executive Summary



Response to some Gaining Provider-Led (GPL) scenarios

(Please see Appendix 1 for a description of the scenarios shown)

- When described, GPL as a process is welcomed by most in the sample
- The key perceived advantages were:
 - Convenience
 - Greater certainty that the transfer would take place without ‘gaps’ or ‘overlaps’ in billing
- The key perceived disadvantages, expressed more strongly by the **uncertain & doubtful**, were:
 - Loss of control
 - Loss of ‘negotiating power’ with their current provider
- Method-wise, the strongest preference was for cancelling and porting directly by the new provider (as opposed to a third-party)
- A choice of new provider channels (i.e., telephone, online, in-store) was generally preferred



Main findings



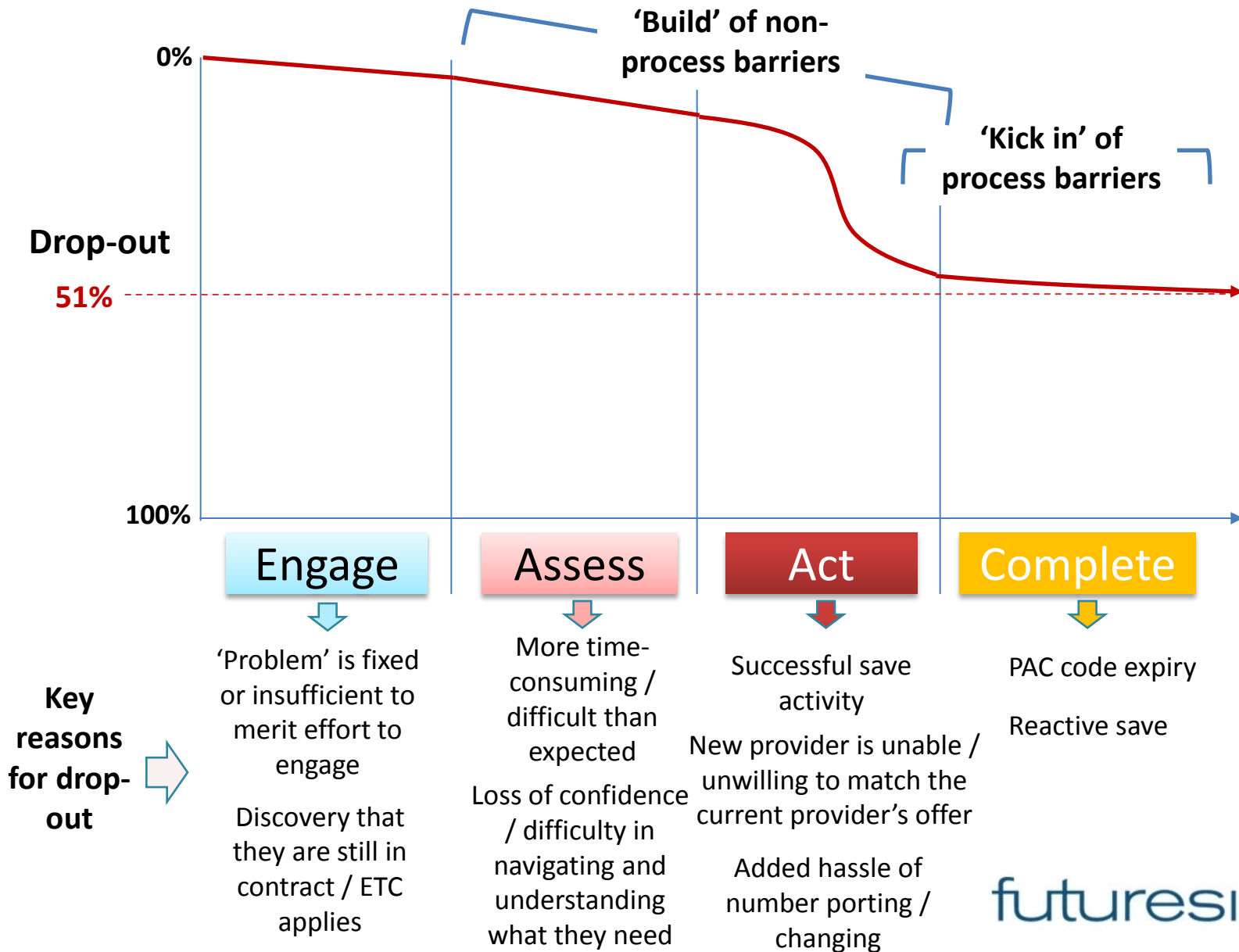
Experiences across the journey - overview



This section . . .

- Highlights the pattern of drop-out at the different stages
- Provides an overview of key difficulties at the different stages across the journey
- Summarises barriers that impact on the decision to switch, and where these occur in the journey
- Introduces key ‘mind-sets’, at the outset of the journey, and emotions felt at the end of the journey

The Journey - overview



The Journey - overview



- The two difficulties reported that had most impact on the decision **not** to switch were . . .
 - **During assessment:** difficulties in navigating the market. Time, hassle, difficulty in understanding ‘real’ needs and reducing perceived ‘risk’
 - **At the time of deciding (Act):** successful ‘save’ activity plus hassle, difficulty and ‘awkwardness’ in leaving their current provider
- This can be seen in the diagram (in the previous slide) which shows that the biggest levels of drop-out occurred at the Assess and particularly ‘Act’ stages

The Journey - overview



- Most participants did not think about switching ‘processes’ until later in their journey
 - Not widely / strongly considered at the outset
 - Considered, and more often ‘discovered’, along the way
 - Brought into full focus at the point of deciding (‘Act’)
- When they ‘kick in’, aspects of the current processes act as a barrier, particularly among the less confident / less savvy. For example:
 - Having to contact their current provider (to obtain their PAC) was reported to add to perceived ‘hassle’, effort and difficulty
 - In turn, this encouraged some to consider that **changing** their number was comparatively easier than keeping their existing number
- These perceptions / understanding of the process put some respondents off from switching altogether by:
 - Increasing the effect of save activity / perception of gain by staying
 - Increasing the level of gain required from potential new providers to switch

The Journey - overview

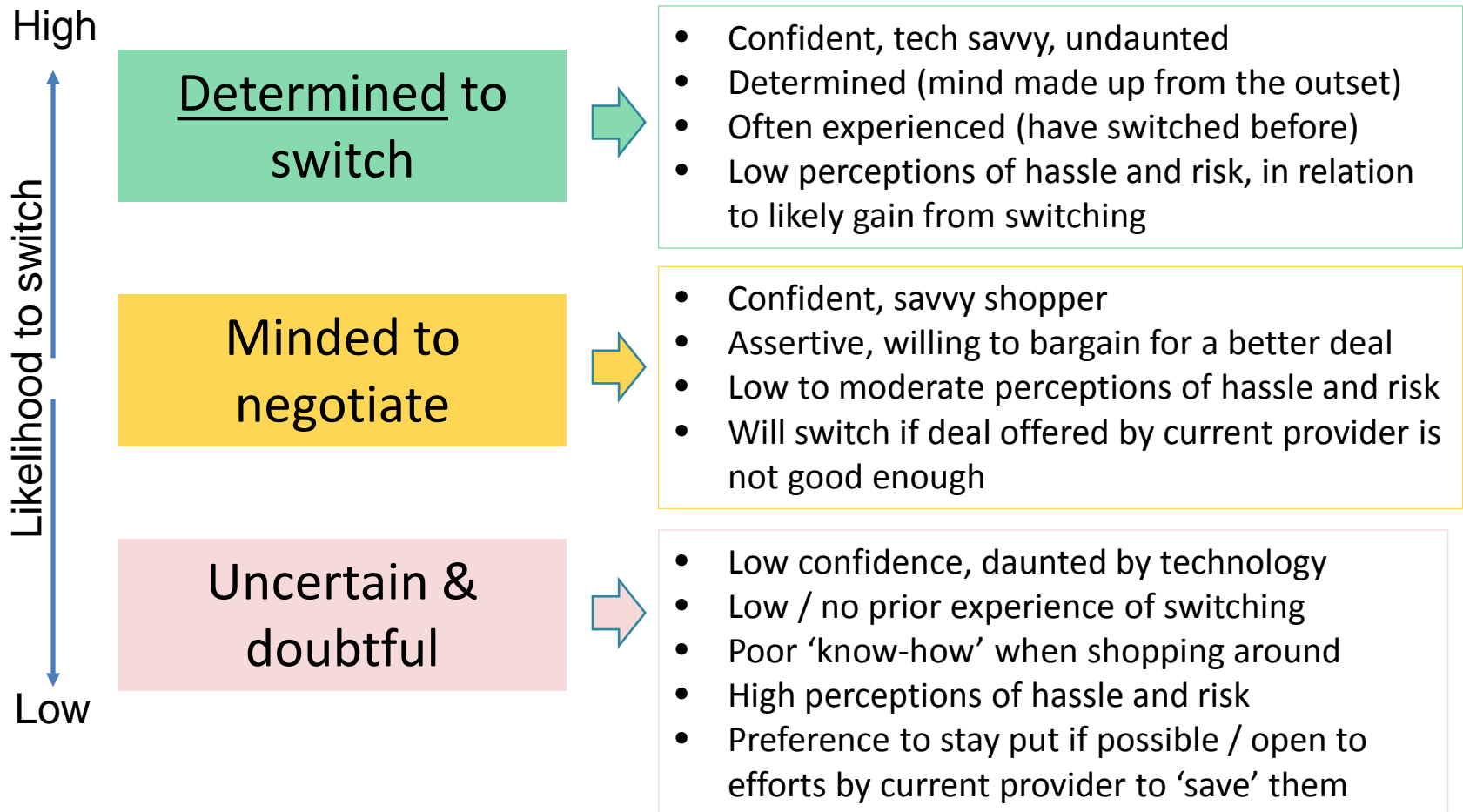


- Other difficulties tended to be experienced after the decision to switch
- For the most part, these were related to . . .
 - Billing overlap (lack of coordination)
 - Gaps in service (poor coordination / porting delays)
- Few of these switchers said they were organised / experienced enough to know what was needed in advance
 - These respondents were most likely to take personal responsibility for any problems incurred throughout their switching experience
- For most switchers, it was observed (and sometimes reported) that timing / coordination tended to be more a matter of luck than judgement

The Journey - overview



- Three in-going mind-sets were identified:



The Journey - overview



- The quality of the **Assess** experience was key to reinforcing or challenging these in-going mind-sets
- For example, a negative assessment experience led to a feeling of frustration among the **determined**. A positive experience led to a feeling of encouragement among the **uncertain & doubtful**

Assess experience:

In-going mind-set



Negative



Positive



Determined to switch



'Frustrated'

'Confident'

Minded to negotiate



'Disappointed'

'Empowered'

Uncertain & doubtful



'Anxious'

'Encouraged'

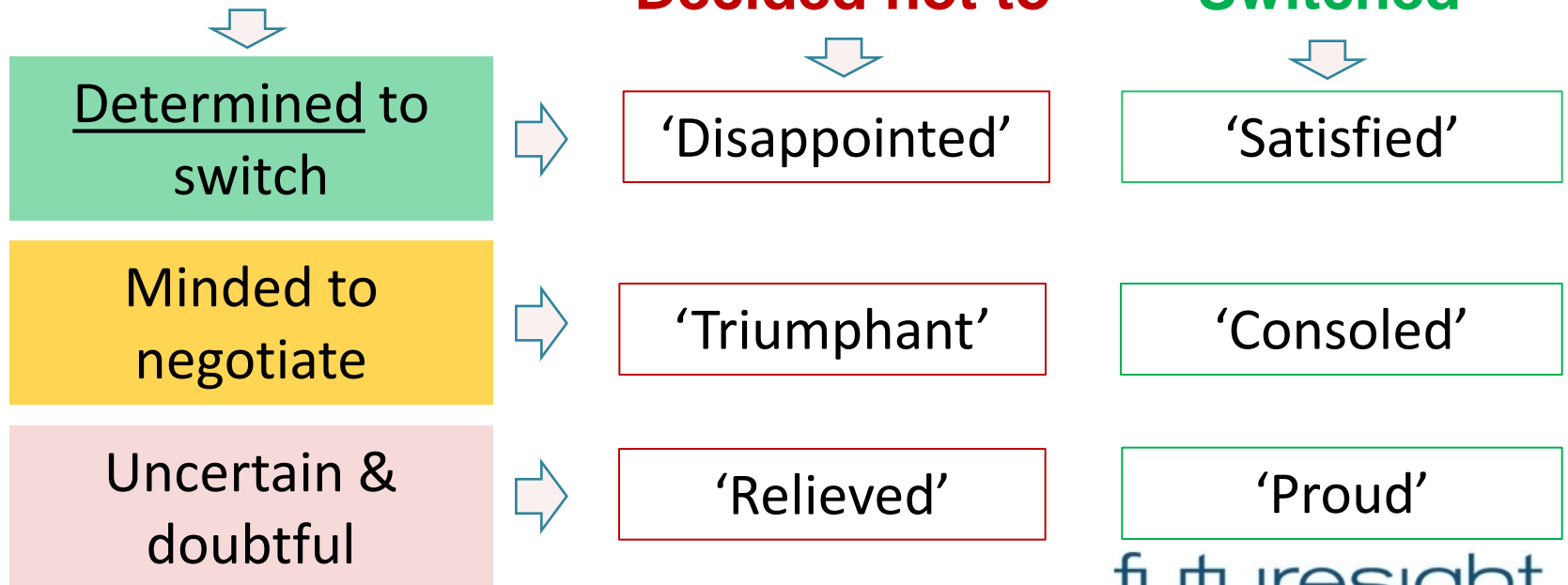
The Journey - overview



- Different resulting emotions were evident, after decision made to either switch or decide not to (Act). For example:
 - Those who described themselves, initially, as **uncertain & doubtful**, tended to express a degree of pride in switching, given the uncertainties that they managed to overcome
 - Those who claimed that they were **minded to negotiate** initially, reported a degree of ‘consolation’ having switched, i.e., though they preferred to stay put, they gained sufficiently from switching

In-going mind-set

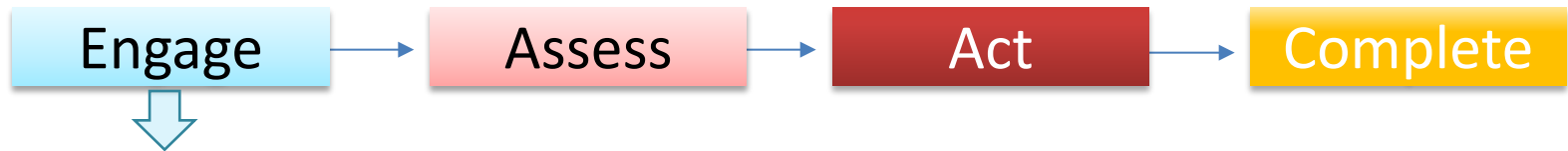
Outcome:





The Journey in detail

– initial engagement



The point at which a customer decides to enter the market, with a view to switching

This section . . .

- Provides a summary of the key motivations for engaging in the market
- Describes the key mind-sets that participants have at the start point of engage
- Includes pen portraits of these mind-sets, to illustrate feelings, expectations and competencies at the outset of the journey

Engage - summary



- Key reasons for engagement related in the main to ‘reactive’ factors, e.g., a ‘problem’ or ‘complaint’ with the service quality, customer service and / or cost
- Broadly, participants fell into three main categories, in terms of their mind-set at the outset:
 - **Determined** to switch
 - **Minded to negotiate** with their current provider
 - **Uncertain & doubtful** as to their likely success in switching
- These in-going mind-sets varied in terms of confidence, experience, tech-savviness and attitudes to risk, all of which could be seen to impact strongly on actual switching outcomes
- There was very little drop-out at this initial stage

Engage



Key reasons / motivations for engagement . . .

Routine (a few)

- End of contract
- Opportunity for financial review

Reactive (majority)

- Poor allowances / over-billing / 'bill-shock'
- Increased 'burden' in having to 'micro-manage' data usage (no capping)
- Resentment / feeling of paying more than they need to
- Better deals offered to new customers only
- Poor customer service / unresponsive / not feeling valued
- Change in service (loss of signal due to house move / new work location)
- Loss of 'added value' benefits, e.g., Orange Wednesdays

Proactive (minority)

- Promise of significant savings 'elsewhere' (SIM-only)
- Opportunity to obtain more data (at lower cost)
- Greater freedom to use data hungry apps
- Handset upgrade opportunity
- Excitement and 'freedom' to choose
- Access to (better) 4G coverage

Engage



- The sample was unified by an enthusiasm for wanting to switch
- The approach and journey progress was mediated by the three different in-going mind-sets . . .

**Determined to
switch**

**Minded to
negotiate**

**Uncertain &
doubtful**

- The following slides illustrate (via pen portraits) each of these mind-sets



Determined to switch

- **Background:** confident, savvy, loves technology
- **Reactive trigger to engage:** felt ‘tricked’ into accepting 2Gb data instead of unlimited, mid-way through his contract. Now going over his allowance and having to micro-manage usage
- **Proactive trigger to engage:** opportunities to increase data allowance at a lower cost
- **Mind-set:** assertive, undaunted, mind ‘made-up’ from the outset, ‘immune’ to actual and potential ‘save’ activity
- **Approach:** clear-sighted, purposeful, well-prepared and informed, via online research, **prior** to engagement with potential new providers
- **Perceived ‘hassle’ and attitude to risk:** low: relaxed, unperturbed, with a firm view that potential for gain elsewhere outweighs the hassle / risk of switching

Engage – pen portraits



Determined to switch

“My mind was made up before my contract had ended”

“Really important to know what you want before you call these people. You can get bamboozled otherwise. You need to be purposeful and prepared . . . well armed. If they think you don’t know what you’re talking about, they’ll take advantage of that”

“When I called to cancel and get my PAC, I was ready to deal with what I call the ‘turnaround guy’. It’s easy. You just keep saying no, no matter what they offer. In fact, they know you mean business and so don’t really try it on”

“I wasn’t listening. I didn’t need to listen. I knew that they were never going to offer ‘free everything’ for 24 months, which is what it would take for me to stay”



Minded to negotiate

- **Background:** confident, ‘savvy shopper’, functional use of technology
- **Reactive trigger to engage:** ‘resents’ paying too much. Belief that she can get better value elsewhere. No reward for loyalty
- **Proactive trigger to engage:** promise of ‘major’ savings elsewhere, via SIM-only. Opportunity to ‘leverage’ this with her current provider
- **Mind-set:** assertive, ‘daring’, has the ‘front’ to bargain and negotiate with **both** current and potential providers, from the outset
- **Approach:** missionary ‘zeal’, to get from her current provider what she can get elsewhere, to avoid the ‘hassle’ of switching. Happy to devote time and effort to go backwards and forwards, between providers, to ‘play them off’. Went as far as asking for her PAC, to win concessions (knowing that she didn’t have to use it)
- **Perceived hassle and attitude to risk:** low to moderate. No great qualms about switching if the deal from her current provider is not ‘good enough’



Minded to negotiate

“If it’s any contract that needs renewing I’ll look at it. I’ve absolutely no loyalties whatsoever. Haggling’s in my blood”

“If I can get the best deal from who I’m with, then there’s no reason to switch. I’d switch if I had to. It’s not that difficult. It all depends on who offers the best deal”

“You need the balls and the front to do it. I just keep on saying: ‘Is that the best price you can give me?’ My husband hides his face!”

“I call again because you can get to speak to a different agent who might offer more than the other one did”

“They didn’t budge enough, so I asked for my PAC. And, hey presto, they called me back and offered me what I wanted. Honestly, I don’t know why they make me go through all this. Why don’t they just give me what I want in the first place?!”



Uncertain & doubtful

- **Background:** daunted by technology, low confidence, fears change, low / no previous experience of switching
- **Reactive trigger to engage:** poor signal due to house move
- **Proactive trigger to engage:** opportunity to upgrade, ‘step up into the modern world’, get to grips with a smartphone
- **Mind-set:** anxious, unsure, ‘leap into the dark’, doesn’t know what she doesn’t know. Unsure that she can actually keep her number. Worried that changing her number will be a ‘hassle’
- **Approach:** haphazard, unprepared, overwhelmed, strange terminology, feels ‘bamboozled’. And so, seeks ‘comfort’, ‘warmth’ and friendliness of her current provider
- **Perceived ‘hassle’ and attitude to risk:** high. Key fear of a ‘mistake’ and then ‘too late’ to get out of a contract



Uncertain & doubtful

“I’m perfectly fine with gas and electricity. It’s easy. They make it easy. Computers though, mobile, mega-watts, giga things, and all that – I just don’t feel comfortable”

“Frightened of changing my phone. It’s taken me two years to get to grips with the one I’ve got”

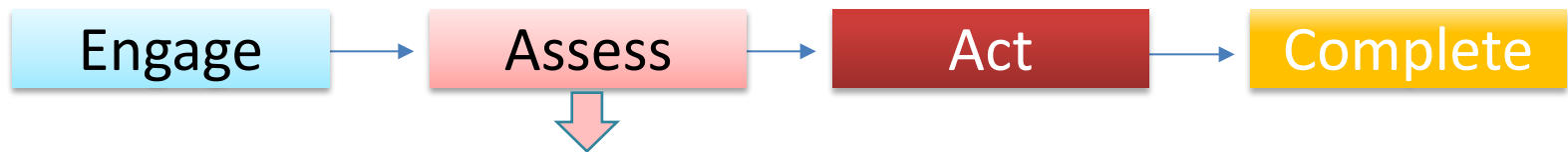
“You go into a phone shop. They ask you what you want instead of helping me to know what I need. The moment you can’t say what you want, they lose all interest. I feel stupid. It’s all geared to younger people who know the jargon and know what they want”

“They said I needed a PUK or something. I thought, gosh, that’s just more hassle and worry. I don’t have time for it”

“I spoke to my current server [sic] and felt relieved to be honest. They were really friendly and helpful. It made me stay put because, well, honestly, they are the only devil I know. It’s so much easier”



Assess



Search and research activity, including any interaction with current or potential gaining providers, that facilitates understanding of the costs, benefits, options, methods and implications of switching

This section provides . . .

- An overview of the different approaches taken by participants when assessing the market
- Specific areas of ease and difficulty experienced, depending on the approach taken
- A summary of changes to mind-sets as a result of the assessment experience

Assess - summary



- The approach taken, when assessing the market, had a major impact on the switching decision
- Typically, the more confident and tech-savvy were more likely to switch by being:
 - Better enabled to assess their options comprehensively and efficiently
 - Better informed when dealing directly with both current and potential new providers
- By contrast, the less confident were less likely to switch, by being:
 - Poorly equipped to shop around and gather information fully and effectively
 - More easily convinced that choice was limited
 - More easily convinced their current provider offered the 'best' deal / quality of service
- The following slides provide detailed illustrations of the typical assessment approach taken by different participants

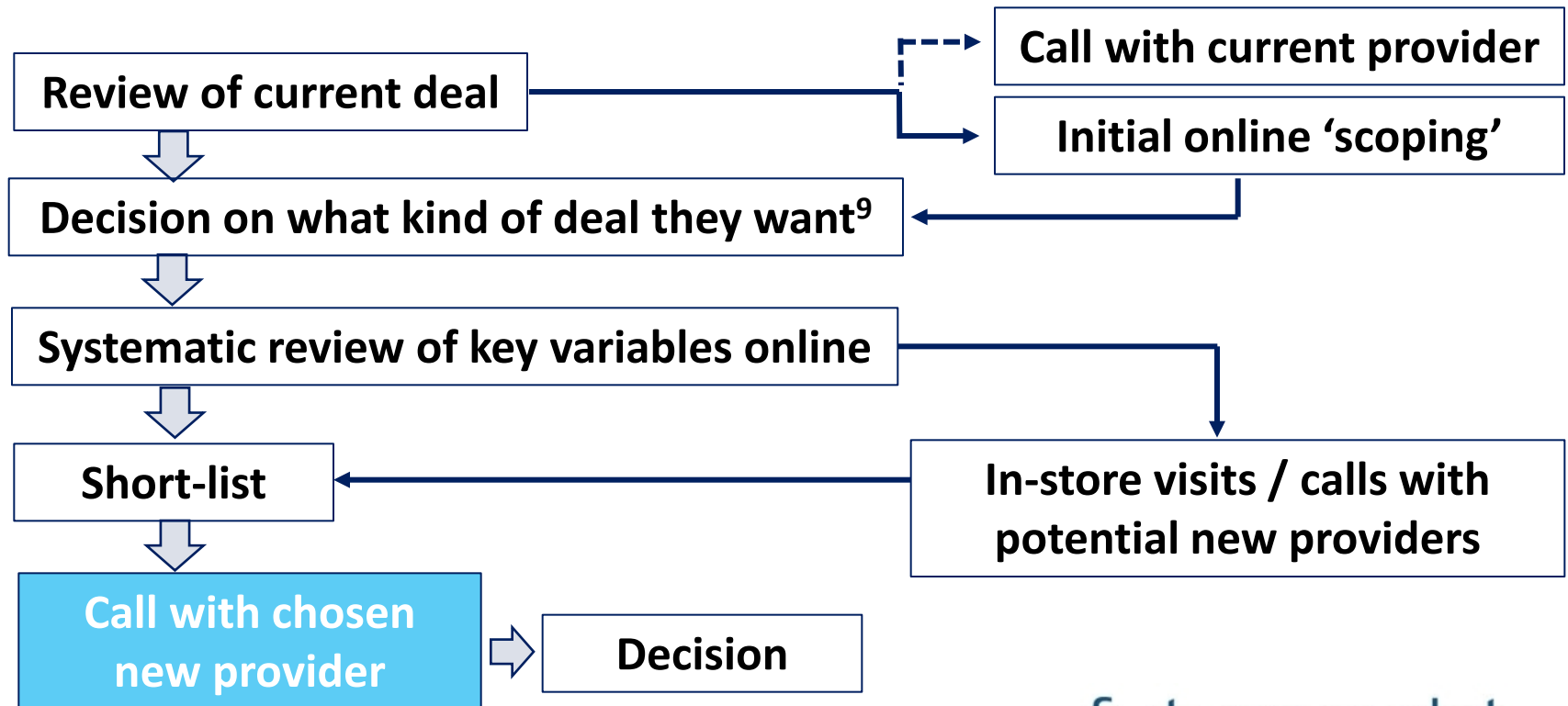
Ofcom's Quantitative Research⁸ reports that lack of choice was a major factor in the decision to remain with their existing provider, for one in seven 'considerers', i.e., consumers who planned to switch but did not eventually do so

Assess – different approaches



Determined to switch

- Typically, the more determined in the sample demonstrated a linear approach - clear-sighted, purposeful, goal-driven, efficient, over the shortest time-frame (compared to others):



⁹ Handset, minutes, texts, data, price band

Assess – different approaches



Determined to switch

- Most confident in the sample
- Typically . . .
 - Previous switchers
 - Younger (18-30 year olds)
 - Digital natives / online savvy
 - Prefer ease / convenience of online
 - Reduce time / effort via use of comparison sites
 - Well-informed, prior to store visits
 - Know what they need to know
 - Command attention / responsiveness and ‘respect’ from potential new providers in-store
- Positive feelings toward new providers:
 - **New providers:** helpful, informative, advisory, not ‘pushy’
 - **Current provider:** unvalued, unhelpful, unresponsive

“All pretty easy really. The key thing is that you must know what you want”

“If you do your homework before going into the store to talk, you get a lot more help and advice out of them, and less selling, which is the bit I hate. They know that you know what you’re talking about”

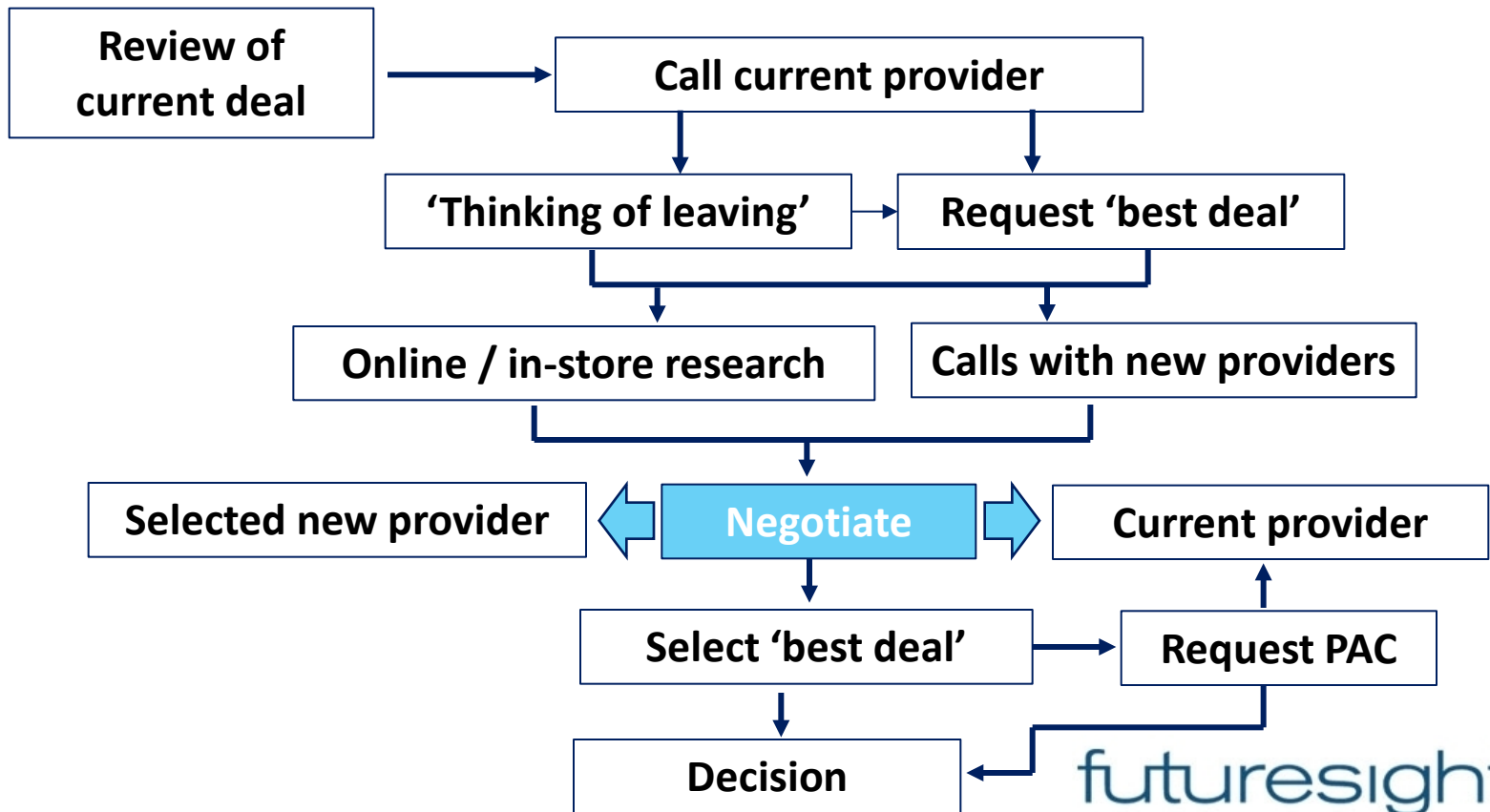
“I did most of my research online, using comparison sites and then looking at specific deals. It’s the best and most convenient way to do it”

Assess – different approaches



Minded to negotiate

- Typically, an iterative approach was adopted by this sub-group, i.e., a process of ‘to-ing’ and ‘fro-ing’ between current and potential new providers, building to a decision:



Assess – different approaches



Minded to negotiate

- Moderate technical know-how, but assertive / undaunted when shopping around
- Typically . . .
 - Older (30-50 year olds)
 - ‘Canny’, financially astute
 - Persistent
 - Prefer direct contact (in-store, phone)
 - Minimal online research – ‘just enough’ to ‘leverage’ response from current provider and potential new providers
 - Willing to re-call and re-visit stores to ‘improve’ negotiation outcomes
 - Sometimes will ‘ask for PAC’ as a negotiating tactic (knowing that it does not have to be used)

“I went online to begin with but felt I wanted to call because you can get more from them on the phone”

“I called at the wrong time and spoke to an Indian call centre. No use. They read off a script. Better to call in the day – to speak to someone who you can bargain with”

Assess – different approaches



Minded to negotiate

- At this stage, mainly neutral (dispassionate) feelings to their current provider and potential new providers alike:
 - ‘Business-like’, informative, helpful
- Some, (less persistent) expressed disappointment if their current provider didn’t try to keep them, i.e., the current provider:
 - Not ‘budging’ from their initial offer
 - Not appearing to be ‘bothered’ when they threaten to leave
- Feelings could then change . . .
 - **Current provider:** unhelpful, unresponsive, unrewarding (for loyalty)
 - **Potential new providers:** Helpful, generous, positive, responsive

“I called [current provider] and was really surprised. I said I was thinking of leaving and they said fine. I was shocked. 8 years of loyalty doesn’t seem to count for anything”

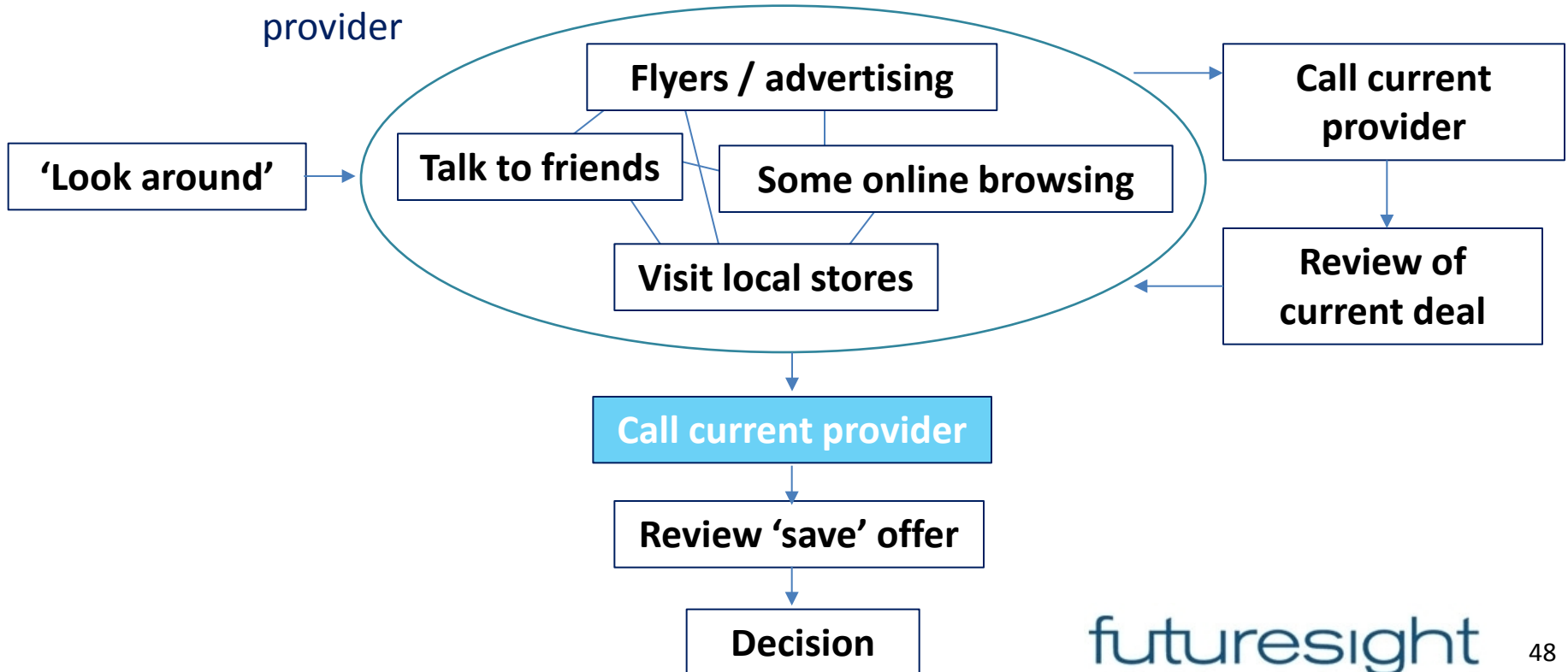
“I don’t think it worked. I think they called my bluff. I will have to start looking for someone else for real now”

Assess – different approaches



Uncertain & doubtful

- Typically, the **uncertain & doubtful**:
 - Demonstrated a linear approach, but this was often haphazard, unfocused and most time-consuming and inefficient
 - Felt poorly informed / ‘equipped’ prior to discussions with their current provider



Assess – different approaches



Uncertain & doubtful

- Least confident, technically and shopping-wise
- Typically . . .
 - Older (50+)
 - Low / mid-level needs ('basic' smartphone, low use tariffs)
 - Poor awareness / use of independent information sources (e.g., reviews)
 - Confused, easily put off / daunted by terminology, making it hard to compare – particularly 'Gb' data needs
 - Reliant on friends & family for advice
 - Averse to online for research (lacks dialogue / explanation)
 - Preference for in-store dialogue
 - Poor / variable in-store experiences
- Positive feelings toward current provider:
 - **Potential new providers:** typically feel cold, unhelpful, uninformative, 'pushy'
 - **Current provider:** feel warm, 'safe', 'value me', helpful, responsive

"I looked online but it's complicated. Overwhelming really. Quite stressful, I really needed to talk to someone"

"I don't know what I need. That's the problem. It makes it difficult to know whether what's being sold to you is right for your needs"



Uncertain & doubtful

- Their biggest difficulty (reported) was: **Not knowing what they don't know**
- Typically, in-store experiences were very off-putting:
 - Geared to 'younger people' / people 'in the know'
 - Pushy, 'keen to sell', not listen to needs
 - So bad that some claimed they would never repeat the experience
- Some had more positive experiences, but worries remained:
 - Helpful, prepared to listen
 - Still hard to know whether offer met needs
 - Worries about 'making a mistake'
- Either way, this tended to encourage a discussion with their current provider prior to 'acting'

"It's a minefield. They [stores] are not interested unless you are going for the most expensive phones"

"I was told that all the smartphones were high tech and I should go and look in other stores!"

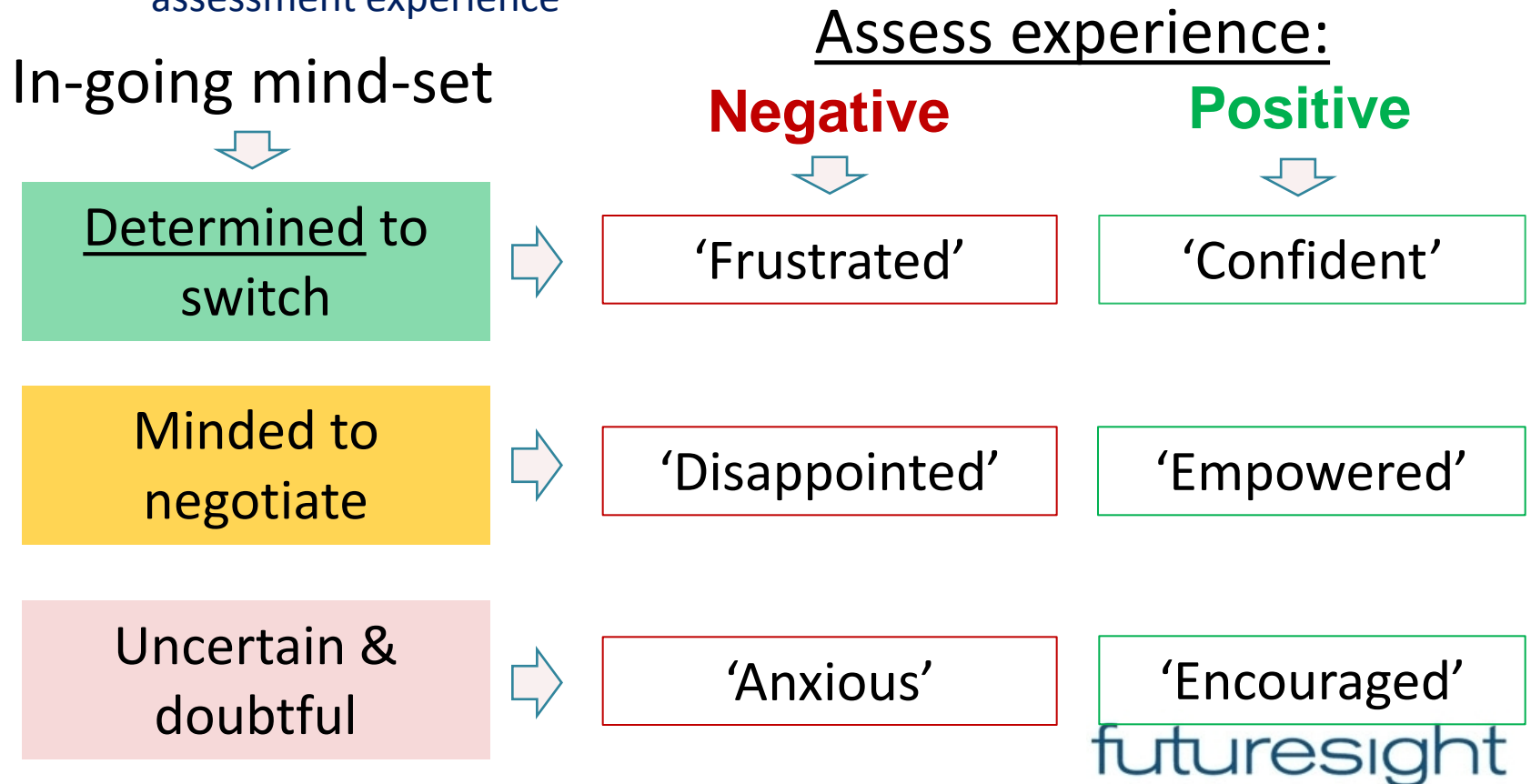
"I felt embarrassed, as if I didn't belong there"

"How do I know how many gigabytes I need? I could end up paying more than I need to and then it's too late. You're stuck"

Assess - outcomes

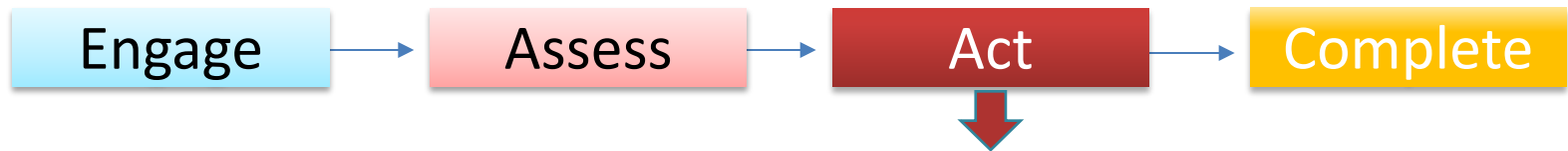


- Overall, the **Assessment** experience had a strong impact on either reinforcing or challenging in-going mind-sets
- For example, the **uncertain & doubtful** tended to report a feeling of stress and anxiety after a negative assessment experience. The **mindful to negotiate** sub-group claimed to feel empowered after a positive assessment experience





Act



The point at which a customer weighs up their options and makes the decision to switch or not switch

This section provides . . .

- A focus on the key ‘moments of truth’ that describe what drives the decision and what determines it
- A focus on the impact of save activity
- An description of emotions felt after whatever decision was made

Act - Summary



- Participants with different in-going mind-sets experienced different ‘moments of truth’ at the time of deciding to switch or ‘stick’ with their current provider. In summary:
 - Those who were initially **determined to switch**, tended to make their decision based on interaction with their selected **new provider**
 - Those who were initially **minded to negotiate** tended to select the ‘best option’ based on contact and interaction **between** their current and potential new provider
 - Those who were initially **uncertain & doubtful** tended to make their decision based on interaction with their **current provider**
- Key difficulties at this decision-making stage were most often experienced by the **uncertain & doubtful**, and related to:
 - Time required to get through to cancel
 - Time and reported ‘hassle’ when dealing with their current provider’s retention department
 - Difficulty and reported ‘hassle’ in overcoming (and rejecting) their current provider’s ‘save’ attempts

Ofcom’s Quantitative Research¹⁰ reports that almost 2 in 5 switchers found cancelling to be a major/minor difficulty

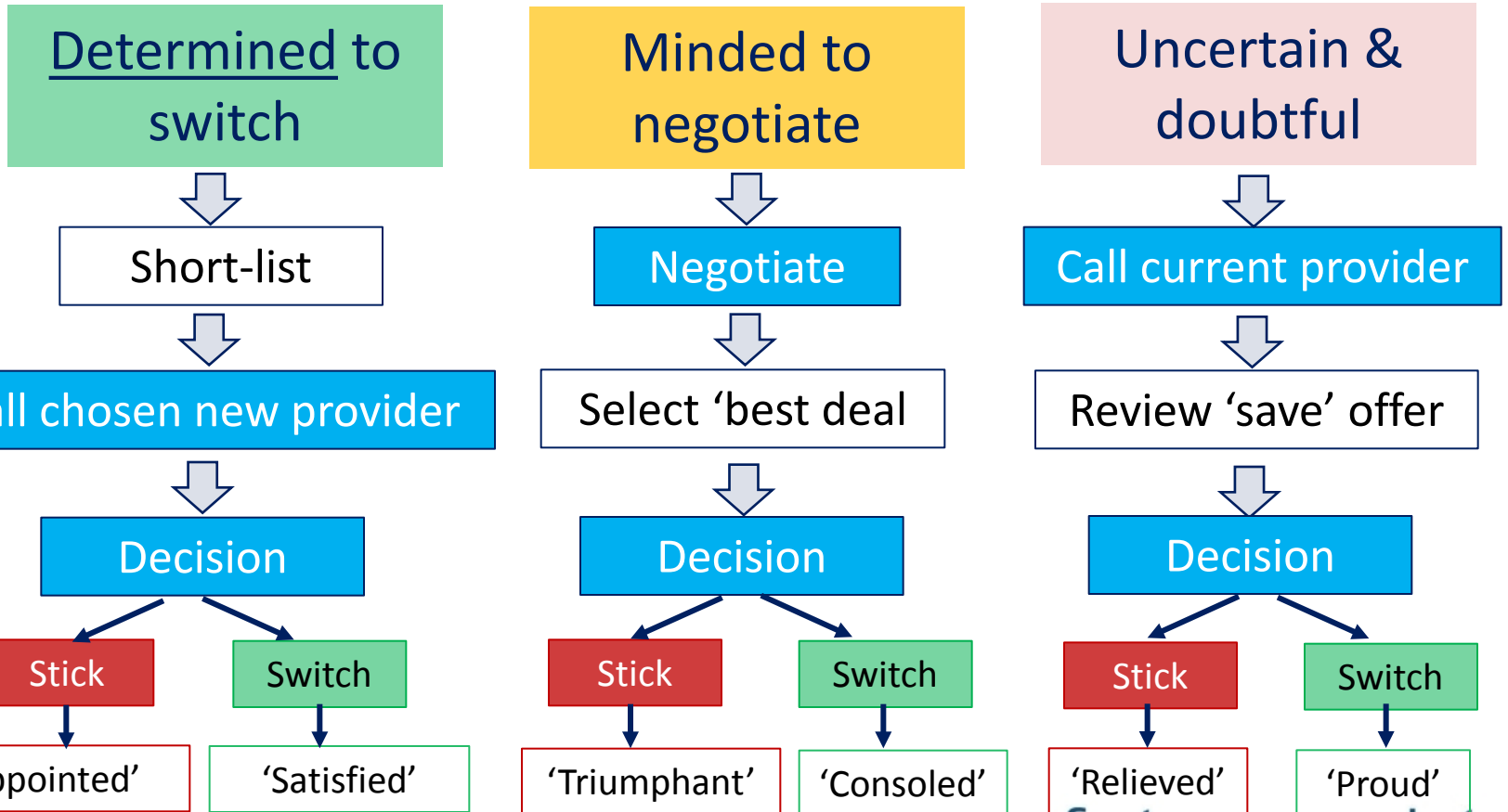
- Of those who were contacted by their current provider, half were contacted and offered a better deal
- Those who succeeded in switching tended to be more confident with technology (compared to the average consumer) e.g., 52% agreed that ‘my friends tend to come to me if they have questions about technology’, compared to 34% for the total sample.

¹⁰ Ofcom Mobile Switching Quantitative Research, September 2015

Act – Key ‘moments of truth’



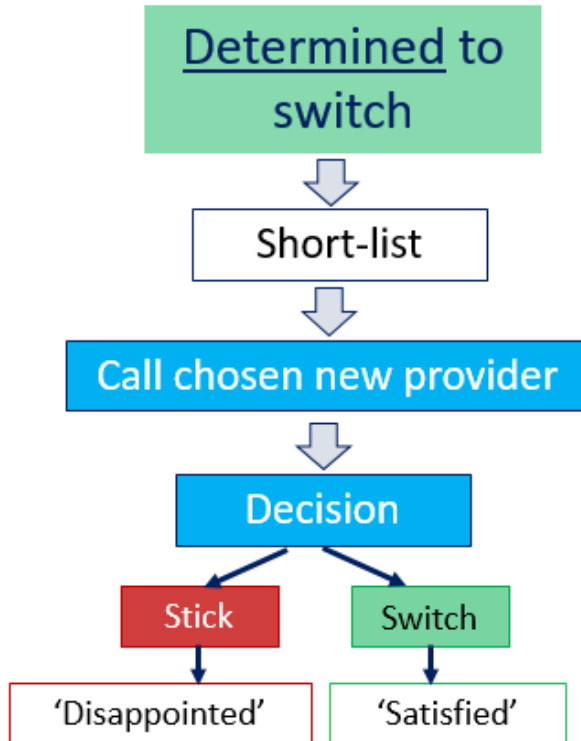
- The blue boxes below summarise the key events or ‘moments of truth’ typically reported by participants, when, having weighed up their options, they decide to either ‘switch’ or ‘stick’ with their current provider
- Each of these moments is detailed in the following slides



Act – Key moments of truth



- Among those who were **determined to switch**, and did so:

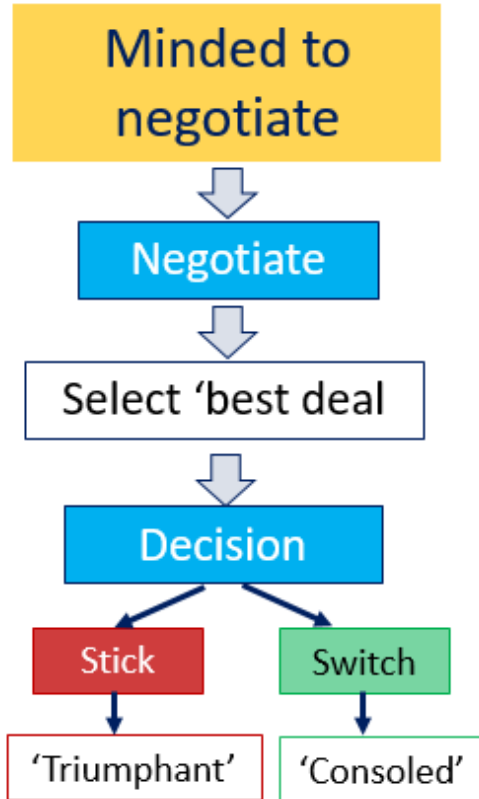


- Majority in this sub-group
- ‘Perfunctory’ call with chosen new provider
 - Check details
 - Confirm deal
- Low impact of cancellation call with current provider
 - No difficulty / awkwardness reported
 - Mind ‘made up’
 - No major save attempts reported
 - Save attempts ineffective in any event

Among those who were **determined to switch** but did **not** eventually do so:

- Minority in this sub-group
- Call with chosen new provider
 - New provider can’t resolve problem with current provider, i.e., signal coverage
- Call to current provider, to cancel
 - Discover they are still in contract / liable for a sizable early termination charge (ETC)

Act – Key moments of truth



Among those who were **minded to negotiate** and did not switch:

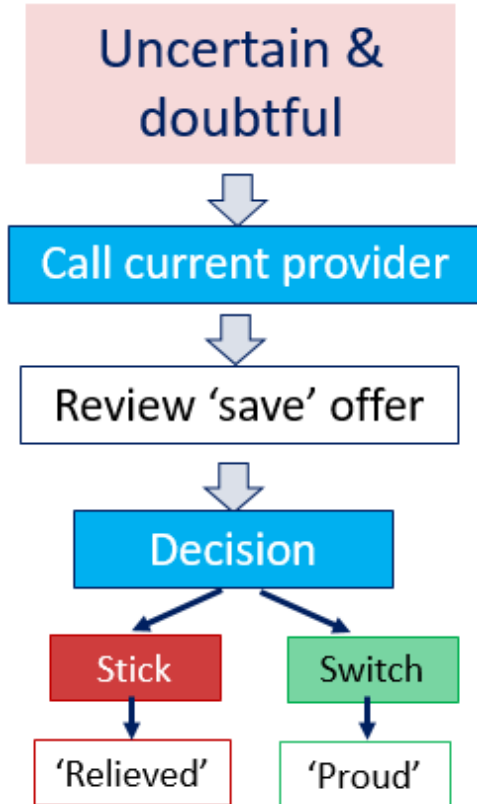
- Majority in this sub-group
- Major (perceived) gain from current provider
- Avoids 'hassle' and awkwardness of leaving, i.e., time required to contact, and dealing with 'retention'
- For many, a strong **sense of achievement** – in gaining what they could get elsewhere, without the 'hassle' of switching¹¹

Among those who were **minded to negotiate** but decided to switch:

- Minority in this sub-group
- Generally positive, but a mixed blessing / consolation
 - Better gain elsewhere (as a result of negotiation)
 - Perceived 'hassle' in having to switch

¹¹ Please see page 13 for the full list of difficulties and 'hassles' identified at all stages in this research

Act – Key moments of truth



*"I did it!!
Hurrah! Who
would have
thought!?"*

- Among those who were **uncertain & doubtful** and decided not to switch
 - Large majority in this sub-group
 - Feeling of current provider as a 'haven', after negative assessment experience
 - Save attempt welcomed and accepted (construed as 'reward for loyalty')
 - Avoids awkwardness / difficulty of leaving
 - Avoids added worry / hassle of switching process
 - Some claimed they would be unwilling to try switching again, given the negative experiences reported at this stage and at the Assess stage
 - In all, many report a strong feeling of **relief**

Among those who were **uncertain & doubtful** but decided to switch:

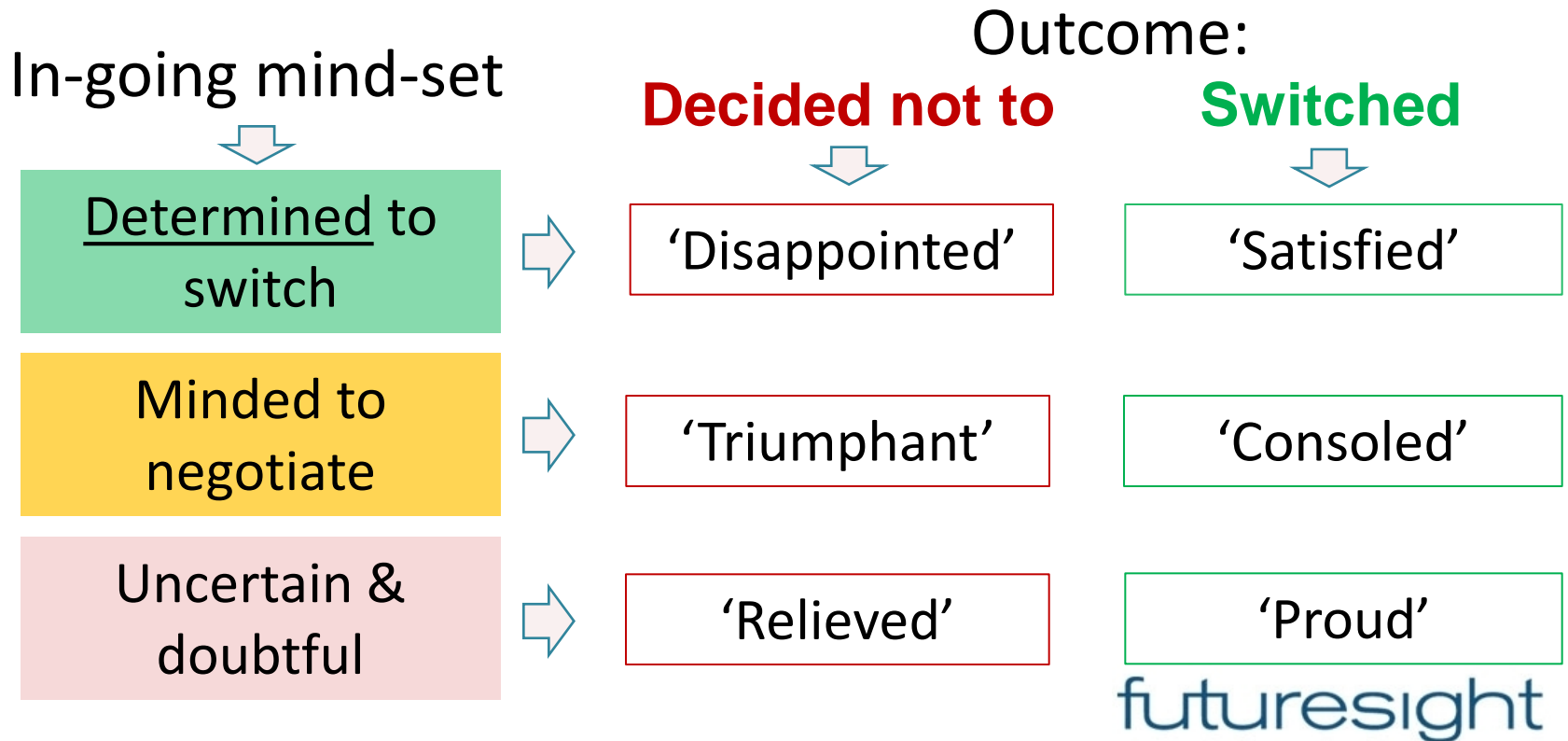
- Very small minority in this sub-group
- Level of gain elsewhere outweighs perceived 'hassle' and risk
- Poor or no save offer from current provider
- Positive assessment experience (emboldening)
- For many, a feeling of **pride**, in having overcome their doubt and uncertainty

"To tell you the truth, I'd feel embarrassed and disloyal if I were to leave them. Sounds silly, but as I walk through [supermarket], I'd worry that they'd look at me and think: 'that's the one that left us. She's not faithful to us'"

Act - outcomes

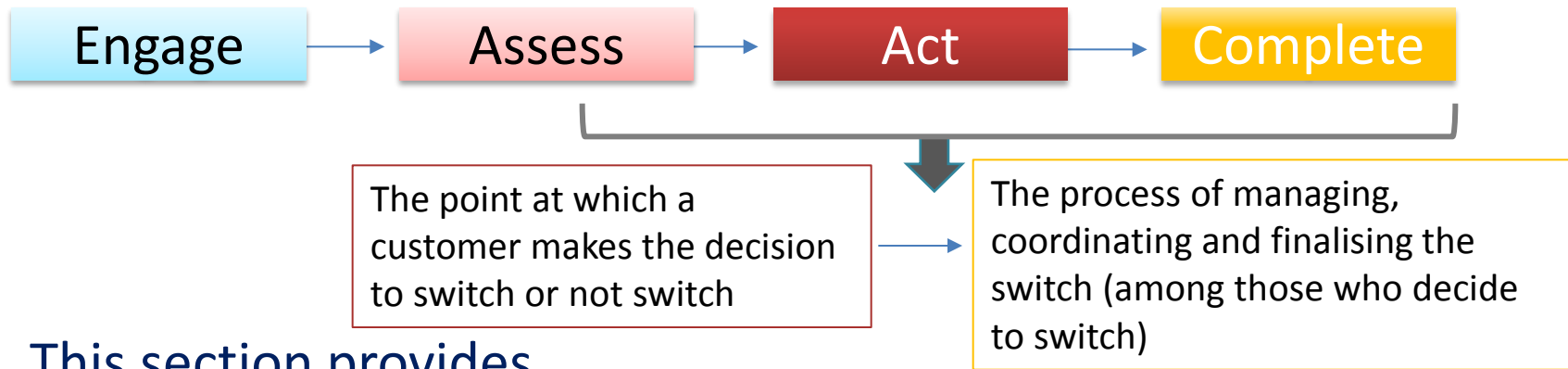


- Different resulting emotions were evident, depending on the decision made (after assessment). For example:
 - Those who were initially **‘minded to negotiate’** tended to report a strong feeling of achievement and ‘triumph’, having decided not to switch as a result of a positive save experience
 - Those who were initially **‘uncertain & doubtful’**, tended to express ‘relief’ when deciding not to switch, again given a positive save experience





Switching experience – from assess to complete



This section provides . . .

- A summary of key motivations for keeping and changing their number
- An overview of awareness, expectations and experience of switching processes
- Detailed experiences of current processes (LPL PAC and C&R)
- Coordination, service loss and billing overlaps during Completion

Switching experience - Summary



- The majority of the sample claimed to have a major desire to keep their number
- Awareness (at the outset) of the steps to take in order to switch varied significantly by previous experience
- Many in the sample were not aware at the outset and tended to 'discover' the steps needed during their journey and particularly just prior to their decision to 'act'
- The majority of switchers in the sample described their experience of the PAC process as positive and satisfactory
- A minority of switchers reported difficulties and were dissatisfied in terms of:
 - Difficulties related to timing / coordination
 - The degree of planning / time / effort required, to avoid 'gaps' and particularly 'overlaps'
- For the majority of those who decided not to switch, current processes could be seen to deter switching, by increasing:
 - Perceptions of 'hassle', effort and difficulty
 - Impact of save activity, and perception of gain by staying
 - Level of gain required from new providers to switch

Ofcom's Quantitative Research reports that among those who had a contract overlap, close to 1 in 3 switchers wanted an overlap to ensure a continuous service. This rises to 40% among those who switched via C&R

Switching experience – why port?



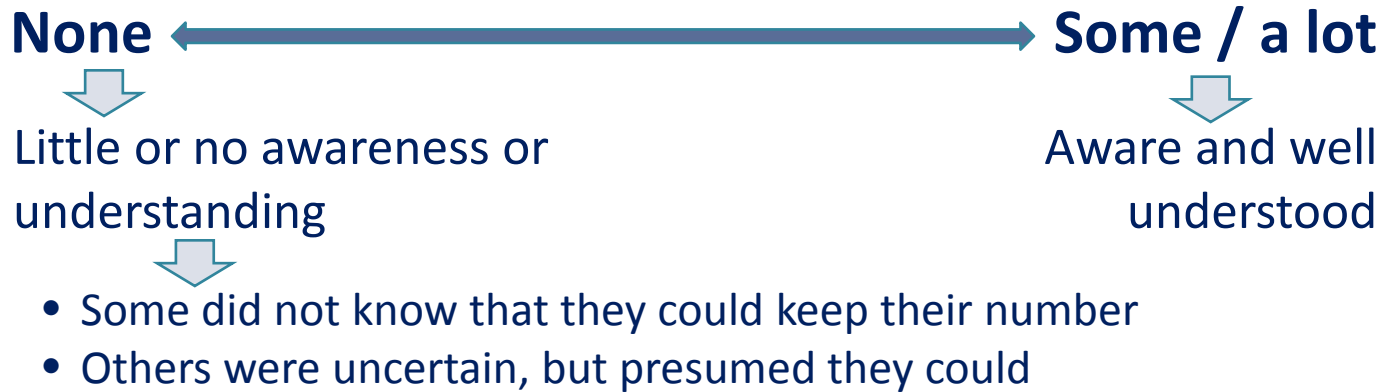
- The majority claimed to have a major desire to keep their number. (Around 9 out of 10 switchers kept their number)
 - Existing number is cherished (a part of their identity)
 - Major hassle to inform everyone (friends, family, but also doctor, dentist, school, etc.)
 - Worries about loss of contact (with people they don't know to inform)
 - Major reliance on existing number for business (self-employed)
- A small minority claimed to be happy / keen to change their number
 - Rids them of 'nuisance' calling (PPI, ex-spouse)
 - The number of friends / relatives, etc. to inform (about the new number) was seen to be 'easy' and manageable
 - Avoids 'protracted' call with current provider / seen as 'simpler' to just cancel
 - Avoids perceived hassle of transferring

Of those who switched via 'C&R', nearly half (46%) claimed that they would have liked to keep their old number

Switching experience – awareness of process

- Awareness at the outset, of the steps¹² to take in order to switch, varied significantly by previous experience:

Past experience of switching



- Many 'discovered' (more about) the processes during assessment (via information sources and discussions with providers)

¹² The main steps were (i) identifying who to inform, (ii) determining how to keep or change their number, (iii) porting their number (if keeping) and (iv) determining how to cancel and re-provide (if changing their number)

Switching process – in-going perceptions



- Many of the less confident (**uncertain & doubtful**) who decided to switch:
 - Claimed to know little, if anything, about what to expect, or how long the process of switching would take
 - Tended to ‘imagine’ that switching would be more difficult and lengthy than it actually was
 - In some cases, claimed to be unsure whether it was possible to keep their number (expecting instead to have to change their number)

“I don’t know what to expect. I’ll just have to see and hope for the best”

“Phone worked straightaway. I was expecting to have to go without it for a day at least”

“I got a temporary number which meant that I didn’t lose any service”

Switching process – in-going perceptions



- Many of the more confident (**determined**) either drew on past experience or claimed to have researched the ‘process’ prior to their decision to switch. Typically, they claimed to:
 - Find that the actual experience was broadly in line with what they expected, i.e., either ‘very’ or ‘fairly easy’
 - Be better prepared and planned to manage and ‘cope’ with any difficulty or delay (e.g., by timing it on a day off)

“It all pretty much went the way I expected it would. All fairly easy really”

“I’ve got two phones, so I was never worried if it took longer, but it didn’t. All went really smoothly, amazingly”

“The PAC was texted to me when they said it would. I then waited to transfer it on my day off so that if there was any delay, it wouldn’t matter so much”

“I was keen to choose the right date so that it would happen at the end of my notice period. There was about an hour when the number transferred but that was fine”

Switching experience – impact of process



- The key majority mind-set, prior to Act, was:

**“I’ll cross that bridge when I come to it
– let’s see what’s out there first”**

- The point at which respondents weigh up their options and make a decision (i.e. Act), brings processes into focus which then can be seen to impact on the decision:

Determined to switch



Unperturbed: mind is made up, regardless of what they need to do / implications

Minded to negotiate



An ‘added’ hassle (and risk): desirable to avoid via negotiation. (Feeling that ‘gain’ from a new provider has to be ‘worth’ the hassle¹³)

Uncertain & doubtful



A real worry: ‘sounds difficult’, ‘things could go wrong’. (“Another reason to stay with my current provider”)

¹³ Please see page 13 for a full list of reported difficulties and ‘hassles’ identified in this research

Switching experience – focus on PAC



For the majority of switchers, the experience of the PAC process was described as positive and satisfactory

- The majority of the sample (around 8 to 9 in 10) reported that their PAC:
 - Was ‘easy to obtain’
 - Required one request only to obtain
 - Was sent to them within the time frame that was promised
 - Worked first time
- A similar proportion of the sample described the following as either ‘very’ or ‘fairly’ satisfactory:
 - The experience of obtaining their PAC
 - The experience of transferring it
- Around a third of the sample reported a billing overlap¹⁴

¹⁴ ‘Most switchers in the sample who experienced a billing overlap claimed that, whilst this was not wanted, was ‘preferable’ in retrospect, to ensure continuity of service

Switching experience – focus on PAC



A minority of switchers described the PAC process as ‘difficult’ and not satisfactory

- A minority of the sample (around 1 in 10) reported that their PAC:

- Was ‘very’ or ‘fairly’ difficult to obtain
- Required two or more requests to obtain
- Was sent to them outside of the time frame that was promised
- Did not work first time

“I was told by [current provider] I had to use it [PAC] within 24 hours, so I did it straightaway. (I was worried that I’d lose the service). It all went from bad to worse after that, because I’m now paying [new provider] and still paying [old provider] for the notice period”

- A similar proportion of the sample described the following as either ‘very’ or ‘fairly’ unsatisfactory:

- The experience of obtaining their PAC
- The experience of transferring it

“I had to use a temporary number for 3 days which was a hassle because I missed calls and had to tell everyone my new number”

- A minority (around 1 in 10) reported a loss in service during the transfer

- A similar proportion of the sample reported a billing overlap¹⁵

“When you press the button for sales, you get through to a UK call centre instantly. When you want to cancel, it’s ages to get through to India. They purposely make it difficult”

¹⁵ Many of the switchers who experienced a billing overlap said it was not wanted and considered it unacceptable



Response to some Gaining Provider-Led (GPL) scenarios¹⁶

This section provides . . .

- A summary of the perceived advantages and disadvantages of GPL as a switching process (when described)
- An overview of responses to some GPL scenarios
- Detailed responses to these GPL scenarios

¹⁶ Please see Appendix 2 for a full description of the GPL scenarios shown to participants

GPL scenarios - Summary



- When described, GPL is welcomed, i.e., the advantages outweighed the disadvantages for most in the sample
- The key advantages were:
 - Convenience
 - Greater certainty that the transfer would take place without ‘gaps’ or ‘overlaps’ in billing
- The key disadvantages, expressed more strongly by the less confident and determined, were:
 - Loss of control
 - Loss of ‘negotiating power’ with their current provider
- Method-wise, the strongest preference was for cancelling and porting directly by the new provider (as opposed to a third-party)
- A choice of new provider channels (i.e., telephone, online, in-store) was generally preferred
- When described and compared, the current methods of switching (i.e., LPL PAC and C&R) were least preferred, except for some in the **uncertain & doubtful** sub-group

GPL scenarios - overview



- A GPL process, for cancelling and porting, (when described) was generally welcomed
- Broadly, the advantages were thought by many to outweigh the disadvantages:

Key perceived advantages

- Easier, simpler, more convenient, saves time
- One call, not two or more
- Among “**determined**”, removes hassle / awkwardness of leaving their current provider
- Strongly facilitates ‘**negotiators**’ and the ‘**uncertain**’ to switch, in situations where they cannot gain from their current provider
- More ‘reliable’ – the new provider has an ‘incentive’ to make the switch happen quickly and efficiently
- Reduced risk of ‘gaps’ and ‘overlaps’ – when decided to switch
- Does not rule out / ‘prevent’ discussion with their old provider

“There’s a stronger incentive for the new company to make it all happen smoothly. They want the business”

“It would have saved me time and hassle, when I discovered that [current provider] wasn’t going to budge”



Advantages – key verbatims

“Simpler, easier, more convenient, saves time”

“Great! It means I can avoid the hassle of calling and cancelling. No more being put through to the ‘retention team’”

“Depends on the deal. If I can’t get the best deal from my current provider, then this saves me time and hassle in getting it all transferred over”

“The new provider has an incentive to do it quickly and get it right. I think they’d work harder [than the old provider] to make it hassle and risk free”

“One contact – to take care of it all. I’d expect that to mean a problem-free switch. It’s like what they do with banks and gas and electricity. It’s really easy”

GPL scenarios - overview



- Disadvantages of GPL, stated by participants, related mainly to perceived loss of control:

Key perceived disadvantages

- Loss of control in managing the switch
 - Fears, expressed spontaneously, of being switched without their knowledge or consent
 - Compared to their current provider, the new provider is not as trusted / no established relationship
 - Happens without their input – reliant on the new provider to inform them / keep them in the loop
 - Reduced negotiating power with current provider – no longer able to request their PAC as a ‘threat’ to leave
- These disadvantages tended to be expressed more strongly by the **‘uncertain & doubtful’** . . .
 - Many reported a fear of placing control into the hands of an ‘unknown’ entity



Disadvantages – key verbatims

“I’d be a bit worried about someone pretending to be me when they call. When you call your own provider, they have all your personal details and can take you through security”

“Makes me feel a bit out of control. You’re handing it all over to some one else to do it for you. I feel as if I want to do it myself, so that I can know what’s going on”

“I know [current provider] and they know me, so I think they would be more trustworthy to be in control of it. A new provider is unknown – and so I’m not sure I’d trust them at the start of it”

“The good thing about the current method is that I can ask for my PAC which then makes them offer me a better deal. If the new company asks for it on my behalf, they’ll just hand it over”

GPL scenarios - overview



- Participants were presented with a number of alternative methods¹⁷ of obtaining a PAC from their chosen new provider and were asked to state their overall preference
- Broadly, the overall order of preference was as follows . . .
 - 1. Obtaining PAC directly from the new provider**
 - At new provider store
 - Call to new provider
 - Online, at new provider website
 - 2. Obtaining PAC via third-party (e.g., Carphone Warehouse)**
 - In-store
 - Telephone
 - Online
 - 3. Obtaining PAC via a central contact centre (common to all operators)**
 - 4. Obtaining PAC via the existing LPL PAC process**
- In order to contact the new provider directly, participants claimed to prefer a choice of methods, i.e., in-store, by telephone or online

¹⁷ Please see Appendix 2 for a full description of the GPL scenarios shown to participants

GPL scenarios - specifics



- Summary of advantages and disadvantages:

Obtaining PAC directly from new provider

	Advantages	Disadvantages
At new provider store	<ul style="list-style-type: none">▪ Greater certainty▪ Face-to-face dialogue▪ Direct, personal confirmation▪ Can hold agent to account	<ul style="list-style-type: none">▪ Inconvenience (unless store is nearby)▪ Limited times / opportunities to get it done
Call to new provider	<ul style="list-style-type: none">▪ As above, but easier / more convenient	<ul style="list-style-type: none">▪ 'Hassle' / time to call / get through▪ Lack of face-to-face contact▪ Harder to re-contact same agent / hold one person to account
Online, at new provider website	<ul style="list-style-type: none">▪ Most convenient▪ 24/7 access▪ Ease / speed of access	<ul style="list-style-type: none">▪ Uncertainty / lack of certain confirmation▪ Worries that request with 'disappear into the ether'

GPL scenarios - specifics



- Summary of advantages and disadvantages:

Obtaining PAC via third-party, e.g., Carphone Warehouse

- With this scenario, 'generic' pros and cons, similar to those for direct new provider channels (on the previous page), were reported, plus:

Advantages

- 'Specialist', expert know-how
- 'Neutral' / independent
- Better placed to 'arbitrate' / resolve disputes between the current and new provider

Disadvantages

- An added 'layer'
- Loss of control / input
- An 'unknown' entity (in this context) / hard to trust
- Concerns regarding lack of speed / efficiency
- Not neutral: focused on 'sales' more than 'service'

GPL scenarios - specifics



- Summary of advantages and disadvantages:

Obtaining PAC via independent contact centre

- Similar 'generic' pros and cons were also reported for this scenario, plus:

Advantages

- Completely independent
- Ease / convenience of 'full service', i.e., determining contract end-date, ETCs, PAC request and PAC transfer
- Removes hassle / burden of responsibility altogether

Disadvantages

- Worries re: delegation of entire process / no control / input at all
- Marked concerns re: possible lack of speed / efficiency / priority
- Call centre queuing (with multitude of others)
- Raises questions:
 - What will it cost?
 - Who will run it?
 - Can they be trusted?

GPL scenarios - specifics



- Summary of advantages and disadvantages:

Obtaining PAC via existing LPL PAC process

- Some (mainly among the **‘uncertain & doubtful’**) claimed a preference for the existing process
 - ‘Feels safest’
 - Gives them direct contact with their ‘trusted’ current provider
 - The potential new provider is ‘unknown’ (untried and untested)
 - The current provider holds their personal details = more secure, re: authorised transfer
 - Greater/ more direct opportunity to be ‘saved’



Appendices



Appendix 1

- Some GPL scenarios shown to participants

Some GPL scenarios shown to participants



Requesting your PAC . . .

1. In a store of the mobile network provider you plan to switch to
2. In a third-party store (e.g., Carphone Warehouse)
3. On the online site of the mobile network provider you plan to switch to
4. On a third-party online site (e.g., Carphone Warehouse)
5. By calling the mobile network provider you plan to switch to
6. By calling a third party (e.g., Carphone Warehouse)
7. By contacting your current mobile network provider, i.e., the provider you plan to switch away from
8. By phoning a central number common for all operators, and speaking to someone who would . . .
 - Obtain details from your current provider about your contract end date
 - Find out about any outstanding charges from your current provider
 - Obtain a PAC from your old provider
 - Give the PAC to your new provider and arrange the transfer of your number

Note: the scenarios 1-8 above were shown individually to participants in randomised order



Appendix 2

**- Detailed research objectives and
topic guides**

Detailed objectives - switchers



- To identify and understand the experiences of switchers and any difficulties they faced (and overcame) when switching provider – and what factors have greatest impact on the decision to switch
- To understand whether any difficulties experienced (and overcame) are linked to the current processes or are linked to non-process barriers – and what these are
- To understand any benefits of the existing process, and respondent behaviour and preferences in relation to losing provider discussions.
- Specifically . . .
 - The impact and triggers of save activity: and the extent this was a ‘difficulty’ that switchers had to overcome in order to switch
 - Losing and Gaining Provider behaviour that could be interpreted as ‘frustrating the process’
 - The experience of the PAC process
 - Any experience of trying to coordinate PAC requests (and PAC expiry date) with notice periods (generally 30 days) to minimise or avoid ‘double billing’.
 - Any other specific difficulties, with a particular focus on any actual or perceived difficulty in obtaining a PAC or the process of C&R.
- To identify aspects of the process that were most difficult and, to the extent they had a significant impact on the overall switching experience, what, could be made easier
- To assess what was gained from switching and the level of satisfaction with the decision to switch
- To identify any differences in the above between participants with a mobile contract, pre-pay or rolling 30-day SIM-only contract

Topic guide - switchers



1. INTRODUCTION (5 mins)

- **Welcome back** and thanks for their diary participation
- **Explain the purpose** of re-convening, i.e., to learn in detail about the ‘journey’ that they have made
- Remind them about our **neutrality** – not here to make judgements about them or the way they went about switching. You may not agree with others or have taken the same steps – and that is fine (encourage debate)
- Remind about **audio and video** recording

2. PARTICIPANT INTRODUCTION (10 mins)

Go around the table, one at a time, and get a brief summary of the start and end point of their journey

- Main reason for wanting to switch – and % certainty
- What triggered them to want to switch at that time?
- Thinking about your whole journey, from assessment to the point you started using your new mobile network provider...what was easy about the experience?
- What, if anything, was difficult?
- Probe on which stage was easiest/most difficult. Experience vs. expectations
 - If we can make a compare and contrast within the groups for C&R and PAC users – i.e., are the same steps easiest / same steps most difficult – where are the differences between users of different processes.



3. FOCUS ON ASSESS STAGE (10 mins)

Introduce: Thinking about when you were looking at alternatives, deciding which other provider to switch to. What worked well/what did they have trouble with?

Spontaneous to begin with and then probe . . .

- Main sources used / relied on – Why?
- Types of information sought and how this benefited them (e.g., cost, quality, where and when did they seek information on what they needed to do in order to switch, e.g., portability, notice periods, who to contact for what, etc.)

Note any mention of PAC requests

- To what extent did previous experience play a role in their understanding of the steps they needed to take. What previous experience (in what sector, if not mobile)
- Perceived ease or difficulty in making comparisons in terms of deals / offers. Why? How?

4. FOCUS ON ACT STAGE (30 mins)

Explain: At some point, either during or after your assessment of your options, you decided, for whatever reason, to switch. Can you help me to pinpoint that moment.

Go around the table: and focus on the specific moment of decision. **Then open out for discussion:**

- What happened at this moment? How did you feel?
- What helped their decision-making? How? Why?

Topic guide - switchers



- What was the main reason you decided switch to your new provider ? What did you gain / lose by switching?
- Did you try to negotiate a deal with you previous provider at all? Why, why not? What was the outcome of this?
- To what extent did your current provider ‘fail’ to persuade you to stay? Or, to what extent did a potential new provider succeed to convince you to switch? Which was it? What makes you say this?
Explore this in depth.
- **Discussions with previous provider** (*as discussed this may flow from earlier in the session, but have moved here in the interests of moving on quickly from the assess stage*)
- What **drives** discussion with their **previous** provider? Why contact them? At what point did they contact them? What were they trying to achieve? Did they achieve everything they needed?
- How did they feel during these discussions? What three words would they use to these conversations, and why?

Which if any of the following words describe how you felt? [Present words not mentioned spontaneously already]

- Reassuring
- Helpful
- Essential
- Informative
- Unnecessary
- Frustrating
- Unhelpful
- Time-consuming

Topic guide - switchers



THEN FOCUS ON OUR SPECIFIC INTEREST IN NUMBER PORTING

NOTE: ASK 4A FOR THOSE WHO PORTED, AND 4B FOR THOSE WHO DID NOT PORT

4A. Explain: You decided to keep your old number. Let's talk a bit about that.

EXPLORE PRIOR KNOWLEDGE AND EXPECTATIONS FIRST

- At the outset, what did you feel you knew about how to or whether you could take your number with you?
 - Anything at all? What? Describe what you knew, **at that time**, about the process of switching and keeping your number. How did you think it worked?
 - How easy or difficult did you think it would be to switch and port your number? And how easy or difficult was it, compared to these expectations. Why?
 - What did you know, if anything, about the expiry date for the PAC? Any issues with this? Did impact on timing / ease of arranging the switch date?
 - If you hadn't taken your number with you, how did you think that would work? Did you think it would be easier, more difficult, or the same, to switch provider – regardless of whether you kept your number?

CHECK:

- How important was it to you to keep your number? Why? How do you feel about the idea of getting a new number? **(Explore differences across the group in terms of perceived importance and reasons)**

Topic guide - switchers



THEN FOCUS ON THE ACTUAL EXPERIENCE

- Thinking about the **experience** you have had, what have you now learned about number porting?
Spontaneous to begin with and then probe . . .
 - What do you know now, that you did not know before?
- **Overall, go around the table:** How easy was it to keep your number? What was easy, what was difficult? Did you encounter any problems, what were these?
 - **Prompt (if not mentioned above)** for discussion around the process of obtaining a PAC from their current provider, how long it took etc.
- **Refer back to what were cited as difficulties (in Section 2) and ask porting this was more or less difficult than other aspects of their journey, and why?**

THEN FOCUS ON THE CURRENT METHOD (LPL)

Explain: Just to be clear, if you wish to keep your number, the current way of obtain your PAC is to contact your old provider and request the PAC yourself. You must then pass this on to your new provider.

- What are the **advantages, if any**, of obtaining your PAC in this way? Why do you say that?
- And what are the **disadvantages, if any**? Why do you say that?

Topic guide - switchers



4B. Explain: You decided not to keep your old number.

EXPLORE PRIOR KNOWLEDGE AND EXPECTATIONS FIRST

- At the outset, what did you feel you knew about what you would need to do in order to change or keep your number?
 - Anything at all? What? Describe what you knew, **at that time**, about how, or whether you could keep your mobile number when changing provider.
 - What did you know, if anything, about the expiry date for the PAC? Any issues with this? Did impact on decision not to keep number.
 - How easy or difficult did you think it would be to keep your number? And did this factor into your decision not to keep your number? Why? Why not?

THEN FOCUS ON THE ACTUAL EXPERIENCE

- In your experience of trying to switch . . .
- How far did you go to keep your old number?
(Did you decide at the outset that you did not want to keep your number? Or, did something happen that made you decide not keep your number? If so, what was this?)
- **CHECK:** Did anyone go so far as to request a PAC? If so, what made them decide not to port?
- Overall, did you think it would be easier, more difficult, or the same, to switch provider – regardless of whether you kept your number?

Topic guide - switchers



CHECK:

- Why did you **not** keep your number? How important was it to you to keep your number?
- How do you feel about getting a new number? (**Explore differences across the group in terms of perceived importance and reasons**)

THEN FOCUS ON THE CURRENT METHOD (LPL)

Explain: Just to be clear, if you wish to keep your number, the current way of obtain your PAC is to contact your old provider and request the PAC yourself.

- If you were to keep your old number, what are the advantages, if any, of obtaining your PAC in this way? Why do you say that?
- And what are the disadvantages, if any? Why do you say that?

IN ALL OF THE ABOVE, NEED TO ESTABLISH HOW FAR THEY GOT, DID THEY TRY AND TAKE THEIR NUMBER WITH THEM AND THEN HIT BARRIERS/OBSTACLES THAT MADE THEM CHANGE THEIR MIND

5. FOCUS ON COMPLETE STAGE (10 mins)

Explain: Let's go on to the period when the actual switch took place. Tell me what happened at that point.

Probe:

- From the time you received your new handset and / or inserted your new SIM card, tell me what you did? Did you get a new handset, or put the SIM into your old handset? Why?
- How much did you feel you knew about what to do in order to start receiving your new service?

Topic guide - switchers



ARRANGING THE START AND STOP DATES:

- How much influence did you feel you had over the actual date the switch happened, tell me about that?
- Did the switch happen on the date that you had requested? Why not?
- What would have been your ideal date, why?
- What factors did you consider when deciding what date to switch over? **Probe:** Did you think about the notice period? Did you consider any loss in service? Did you want a period of overlapping? Why?
- What was the timing of the delivery of the handset? Any issues with that? What?

GAPS IN SERVICE?

- Any time / period without service? (If so, how long, and was this desired? Why?)
(Link back to the factors they took into account when deciding what date to switch – had they deliberately arranged an overlap to avoid any loss in service?)
- **For those who ported:** Any time / period with a temporary number? (If so, how long was it until their number was available to use?)
- **For those who didn't port:** Any period of time without any service at all? If so, how long were they unable to make and receive calls/texts?
- Overall satisfaction with decision to switch, and keep number/change number

6. Recap and introduce hypothetical scenarios (15 mins)

Explain: Looking back and reflecting on your experiences, if you could start again, what, if anything, would you do differently? Why? **Spontaneous to begin with then probe:**

- Thinking about the various steps you went through, How, if at all, could any of these be made easier, probe on all stages: 'assess', 'act' and 'complete'?
- What, if anything, would have made the experience easier, would they have done differently knowing what they do now?

Topic guide - switchers



INTRODUCE HYPOTHETICAL SCENARIOS

EXPLAIN: In some markets, such as energy and broadband, in order to switch providers, consumers contact the new provider who arranges the cancellation of the old service. Think about mobile, imagine that your new provider contacts your old provider on your behalf to transfer your number.

- What are the **advantages, if any**, of this? Why?
- And what are the **disadvantages, if any**, of this? Why?

EXPLAIN: On these cards are different places you could go to cancel and transfer your number (without having to contact your old provider)

**HAND OUT SCENARIOS on CARDS. ASK PARTICIPANTS TO CHOOSE THE ONE THEY MOST PREFER.
[MODERATOR TO NOTE RESPONSES]**

THEN, explore reasons for their preference, plus key positives and negatives (if any).

Obtain spontaneous views to begin with, and then probe . . .

- Advantages?
- Disadvantages?
- How it compares with the current method of obtaining their PAC?
- Any difference in how they would have gone about it, if this method was available? What? How? Why?

THANK AND END

Detailed objectives – non-switchers



- To identify and understand the experiences of non-switchers and any difficulties when trying to switch provider – and what factors have greatest impact on the decision **not** to switch
- To understand whether any difficulties experienced are linked to the current processes, or are linked to non-process barriers – and what these are.
- To understand any benefits of the existing process, and respondent behaviour and preferences in relation to losing provider discussions.
- Specifically . . .
 - The impact and triggers of save activity: whether welcomed or put under pressure and the extent to which this was a key factor in the decision not to switch
 - Losing and Gaining Provider behaviour that could be interpreted as ‘frustrating the process
- Any experience of the PAC process and ending contracts, to identify any aspects of the process that were difficult and what, if anything could be made easier
- To assess what was gained from not switching and the level of satisfaction with the decision to not switch.
- To identify any differences in the above between participants with a mobile contract, pre-pay or rolling 30-day SIM-only contract Includes only those pre-pay customers who wished to port their phone number

Topic guide – non-switchers



1. INTRODUCTION (5 mins)

- **Welcome back** and thanks for their diary participation
- **Explain the purpose** of re-convening, i.e., to learn in detail about the ‘journey’ that they have made
- Remind them about our **neutrality** – not here to make judgements about them or the way they went about switching. You may not agree with others or have taken the same steps – and that is fine (encourage debate)
- Remind about **audio and video** recording

2. PARTICIPANT INTRODUCTION (10 mins)

Go around the table, one at a time, and get a brief summary of the start and end point of their journey

- Main reason for wanting to switch – and % certainty
- What triggered them to want to switch at that time?
- Main reason for not eventually switching
- Thinking about your whole journey, from assessment to the point you started using your new mobile network provider...what was easy about the experience?
- What, if anything, was difficult?
- Expectations: how easy or difficult to switch did they expect it to be?
- **Probe** on which stage was easiest/most difficult. Experience vs. expectations

Topic guide – non-switchers



3. FOCUS ON ASSESS STAGE (10 mins)

Introduce: Thinking about when you were looking at alternatives, deciding which other provider to switch to. What worked well/what did they have trouble with?

Spontaneous to begin with and then probe . . .

- Main sources used / relied on – Why?
- Types of information sought and how this benefited them (e.g., cost, quality, where and when did they seek information on what they needed to do in order to switch, e.g., portability, notice periods, who to contact for what, etc.)

Note any mention of PAC requests

- To what extent did previous experience play a role in their understanding of the steps they needed to take. What previous experience (in what sector, if not mobile)
- Perceived ease or difficulty in making comparisons in terms of deals / offers. Why? How?
- Whether spoke to new or old providers? Why? Why not? (**Note any mention of contacting for PAC, and follow up on this later**)
- What **drives** discussion with their **current** provider? Why contact them? At what point did they contact them? What were they trying to achieve? Did they achieve everything they needed?
- What drives discussion with potential new providers? At what point did they contact them? What were they trying to achieve?
- How did they feel during these discussions? What three words would they use to describe these conversations? Why these words?

Topic guide – non-switchers



- Which if any of the following words describe how you felt? [Present words not mentioned spontaneously already]
 - Reassuring
 - Helpful
 - Essential
 - Informative
 - Unnecessary
 - Frustrating
 - Unhelpful
 - Time-consuming
- Overall satisfaction with their decision? Why do they say that?

4. FOCUS ON ACT STAGE (30 mins)

Explain: At some point, either during or after your assessment of your options, you decided, for whatever reason, to switch. Can you help me to pinpoint that moment.

Go around the table: and focus on the specific moment of decision. **Then open out for discussion:**

- What happened at this moment? How did you feel?
- What was the main reason you decided to stay with your current provider and not switch? What did you gain/lose by not switching? Probe for time and effort, money, service aspects.
- Did you accept/negotiate a deal with your current provider, or make no change at all? If accepted a deal, was this something you were keen to do, why, why not?

Topic guide – non-switchers



- What, if anything could a potential new provider have done to convince you to switch? What makes you say this? **Probe on the aspects they mention above as things they lost / gained by not switching, e.g., time / effort, money, etc.**
- How much time would you want it to take? How much money would you need to save? What would you need to gain?
- What aspects did you think would take the most time, searching for comparable offers, speaking to providers?
- Overall, was there anything about the process of switching itself that influenced your decision not to switch? **Explore this in depth.**
- **Prompt if necessary:** Did you foresee any risks involved in switching – what were these, and what could be done to overcome these?
 - Where did these risks come from, previous experience switching, if yes, in what sector (if not mobile)?

Then reveal our specific interest in number porting:

CHECK FIRST:

- How important is it to you to keep your number?
- Why? How do you feel about the idea of getting a new number?
(Explore differences across the group in terms of perceived importance and reasons)

THEN EXPLORE PRIOR KNOWLEDGE AND EXPECTATIONS

- At the outset, what did you feel you knew about **number porting**?

Topic guide – non-switchers



- Anything at all? What? Describe what you knew, **at that time**, about the process of switching and keeping your number. How did you think it worked? Did you think you were able to switch and keep your number?
- How easy or difficult did you think it would be to switch and port your number? What would be easy, what would be difficult?
- If you hadn't wanted to port your number, how did you think that would work? Again, describe what you knew, at the time, about the process of switching without keeping your number.
- How easy or difficult did you think it would be to switch and not keep your number, easier or more difficult or the same, as if you were going to keep your number?

THEN FOCUS ON THE ACTUAL EXPERIENCE

- Thinking about the experience you have had, what, if anything you have now learned about number porting? **Spontaneous to begin with and then probe . . .**
 - What do you know now, that you did not know before?
 - How easy or difficult did you **discover** that it was to switch and keep your number?
 - Before you decided not to switch, did you think about the importance of your mobile number? Did this aspect of switching have any impact on your decision?
 - How, if at all, did your understanding of number portability influence your decision **not** to switch? **(Explore this in depth)**
- Did you have any concerns about transferring your number over to another mobile provider? Why? Why not? What were these?

Topic guide – non-switchers



5. Recap and then introduce hypothetical scenarios (15 mins)

EXPLAIN: Looking back and reflecting on your experiences, if you could start again, what, if anything, would you do differently? Why? **Spontaneous to begin with then probe:**

- Thinking about the various steps you went through, How, if at all, could any of these be made easier, probe on all stages: ‘assess’, ‘act’ and ‘complete’?
- What, if anything, would have made the experience easier, would they have done differently knowing what they do now?

INTRODUCE HYPOTHETICAL SCENARIOS

EXPLAIN: In some markets, such as energy and broadband, in order to switch providers, consumers contact the new provider who arranges the cancellation of the old service. Think about mobile, imagine that your new provider contacts your old provider on your behalf to transfer your number.

- What are the **advantages, if any**, of this? Why?
- And what are the **disadvantages, if any**, of this? Why?

EXPLAIN: On these cards are different places you could go to cancel and transfer your number (without having to contact your old provider)

HAND OUT SCENARIOS on CARDS. ASK PARTICIPANTS TO CHOOSE THE ONE THEY MOST PREFER.

[MODERATOR TO NOTE RESPONSES}

THEN, explore reasons for their preference, plus key positives and negatives (if any).

- If the one you most prefer was in place, how if at all would it have changed your decision not to switch?

THANK AND END



Appendix 3

- Questionnaires administered to participants

Questionnaire - switchers



The following is a set of questions about the switch you have made to your new network provider.

Note: We use the term 'PAC' in the questions below. Just to be clear, when switching, if you want to keep your old number, you need to obtain a 'PAC' (Port Authentication Code) from your previous network provider, and pass this to your new network provider.

Q1. Please write in your name:

First name: _____ Surname: _____

SECTION 1: This first section is all about how you obtained your PAC

Q2. Which one of the following methods best describes HOW you REQUESTED your PAC code?

TICK ONE BOX ONLY

Telephone	[]
Email	[]
Web-chat	[]
Sales agent requested it for me in store	[]
SMS / Text	[]
Other (Please write in) _____	[]
Don't know / can't recall	[]

Q3. Firstly, which ONE of the following statements best describes how difficult or easy it was to obtain your PAC from your current provider? **TICK ONE BOX ONLY**

Very easy	[]
Fairly easy	[]
Neither easy nor difficult	[]
Fairly difficult	[]
Very difficult	[]

Q4. To the best of your recall, did you request a PAC code from provider on either a Friday or the weekend?

Yes	[]
No	[]
Can't remember	[]

Q5. Did you request your PAC code BEFORE or AFTER any discussion with your new mobile network service provider?

Before	[]
After	[]

Q6. How many requests did you make to obtain your PAC code?

TICK ONE BOX ONLY

One request	[]
Two	[]
Three or more requests	[]

Q7. Approximately, how much time did it take to contact and get through to the right person to request your PAC? (If you are not certain, please make a best estimate)

TICK ONE BOX ONLY

Less than 5 minutes	[]
5-10 minutes	[]
11-30 minutes	[]
31-59 minutes	[]
An hour	[]
2-3 hours	[]
More than 3 hours	[]

Q8. Did you need to provide any kind of notice period to your old mobile service provider before being able to switch to your new provider?

TICK ONE BOX ONLY

Yes	[]	Please go to Q9
No	[]	Please go to Q10

Questionnaire - switchers



Q9. Which one of the following statements best describes WHEN you asked for your PAC?

TICK ONE BOX ONLY

AFTER the END of your notice period	<input type="checkbox"/>
DURING your notice period	<input type="checkbox"/>
BEFORE the START of your notice period	<input type="checkbox"/>
At the START of your notice period	<input type="checkbox"/>
At the END of your notice period	<input type="checkbox"/>

Q10. Around the time of asking for your PAC, were you aware of having to use your PAC within a certain time frame?

TICK ONE BOX ONLY

Yes	<input type="checkbox"/>
No	<input type="checkbox"/>

Q11. From the time when you requested your PAC, how long did it take before you RECEIVED it from your old provider? (If you can't recall exactly, please make a best estimate). **TICK ONE BOX ONLY**

Almost immediately	<input type="checkbox"/>
Up to an hour	<input type="checkbox"/>
Within a few hours	<input type="checkbox"/>
About a day	<input type="checkbox"/>
Within 2-3 days	<input type="checkbox"/>
Within 4-10 days	<input type="checkbox"/>
More than 10 days	<input type="checkbox"/>

Q12. Was this the length of time that your old provider said it would take?

TICK ONE BOX ONLY

Yes	<input type="checkbox"/>
No	<input type="checkbox"/>

Q13. Taking everything into account, how satisfied or dissatisfied were you with the whole experience of obtaining your PAC? **TICK ONE BOX ONLY**

Very satisfied	<input type="checkbox"/>
Fairly satisfied	<input type="checkbox"/>
Fairly dissatisfied	<input type="checkbox"/>
Very dissatisfied	<input type="checkbox"/>

SECTION 2: This next section is all about giving your PAC to your new network provider

Q14. Firstly, from the moment you received your PAC, approximately how long was it before you gave this PAC to your new provider? (If you can't recall exactly, please make a best estimate).

TICK ONE BOX ONLY

Almost immediately	<input type="checkbox"/>
Up to an hour	<input type="checkbox"/>
Within a few hours	<input type="checkbox"/>
About a day	<input type="checkbox"/>
Within 2-3 days	<input type="checkbox"/>
Within 4-10 days	<input type="checkbox"/>
Within 11-15 days	<input type="checkbox"/>
Within 16-31 days	<input type="checkbox"/>
Longer than a month	<input type="checkbox"/>

Q15. When you gave your PAC to your new provider, did it work first time, or did you have to request a new PAC? **TICK ONE BOX ONLY**

Had to request a new PAC	<input type="checkbox"/>	Please go to Q16
Worked first time	<input type="checkbox"/>	Please go to Q17

Q16. After you requested a new PAC (again) from your old provider, how long was it before you received it? **TICK ONE BOX ONLY**

Almost immediately	<input type="checkbox"/>
Up to an hour	<input type="checkbox"/>
Within a few hours	<input type="checkbox"/>
About a day	<input type="checkbox"/>
Within 2-3 days	<input type="checkbox"/>
Within 4-10 days	<input type="checkbox"/>
Within 11-15 days	<input type="checkbox"/>
Within 16-31 days	<input type="checkbox"/>
Longer than a month	<input type="checkbox"/>

Questionnaire - switchers



SECTION 3: This last section is all about the success of your number transfer once you had given your PAC to your new provider

Q17. From the moment you inserted your new SIM card into your phone, how long did it take for your old number to work with your new provider? (If you can't recall exactly, please make a best estimate). **TICK ONE BOX ONLY**

Almost immediately	[]
Up to an hour	[]
Within a few hours	[]
The next day	[]
Within 2-3 days	[]
Within 4-10 days	[]
Within 11-15 days	[]
Within 16-31 days	[]
Longer than a month	[]

Q18. Were you given a temporary number to use whilst waiting for your old number to transfer? **TICK ONE BOX ONLY**

Yes	[]	Go to Q19
No	[]	Go to Q20

Q19. Approximately, how long were you required to use the temporary number? **TICK ONE BOX ONLY**

Up to an hour	[]
A few hours	[]
A day	[]
2-3 days	[]
4-10 days	[]
11-15 days	[]
16-31 days	[]
Longer than a month	[]

Q20. Did you experience any period of time without access to a mobile service from your new provider, when transferring your number from your old provider to your new provider? **TICK ONE BOX ONLY**

Yes	[]
No	[]

Q21. Did you have any difficulty in accessing your mobile service using your ported number? **TICK ONE BOX ONLY**

Yes	[]
No	[]

Q22. Taking everything into account, how satisfied or dissatisfied were you with the length of time it took for your old number to work with your new provider? **TICK ONE BOX ONLY**

Very satisfied	[]
Fairly satisfied	[]
Fairly dissatisfied	[]
Very dissatisfied	[]

Q23. Did the contracts for your old and new mobile service overlap at all? In other words, were you paying for both of them at the same time for any period? **TICK ONE BOX ONLY**

Yes	[]	Please go to Q24
No	[]	Please go to Q25

Q24. How long did the contracts overlap for? In other words, how long were you paying for both of them at the same time? **TICK ONE BOX ONLY**

1 day	[]
2-3 days	[]
4-6 days	[]
A week	[]
2 weeks	[]
3 weeks	[]
A month	[]
More than a month	[]

Q25. Did you want the contracts to overlap? **TICK ONE BOX ONLY**

Yes	[]
No	[]

Questionnaire - switchers



Q26. Taking everything into account, how satisfied or dissatisfied were you with the whole experience of transferring your number? **TICK ONE BOX ONLY**

Very satisfied	[]
Fairly satisfied	[]
Fairly dissatisfied	[]
Very dissatisfied	[]

That's it.

Thank you!

Questionnaire – non-switchers



The following is a set of questions about the experience you had in trying to switch to a different mobile network provider.

Q1. Please write in your name:

First name: _____ Surname: _____

Q2. Which, if any, of the following were factors that made you decide to stay with your existing mobile network provider?

PLEASE TICK ALL THAT APPLY

There was a lack of choice
I was worried that the service wouldn't be as good with new provider
There wasn't enough difference in cost to be worth switching
I didn't know how to change provider / how to switch
No other provider has reception / coverage in my area
It was too time consuming to go through the process of switching from one provider to another
I didn't want to go through the hassle of setting up a new online account
I was concerned about having no service while switching to another provider
I didn't want to lose friends and family or other call discounts
I was concerned about paying two providers at the same time
I didn't want to lose my phone number
My current provider is still the best deal / cheapest
I prefer to stay with a trusted / known provider
The problems / issues I have with my current provider are not sufficiently bad / frequent to switch
It's too time-consuming to find a better deal
It's difficult to compare the services available from different providers
I had a bad experience when switching my mobile provider previously
I had a bad experience switching other services previously
My current provider has the best quality of service (e.g., network coverage)
Better handsets were available with my current network / I didn't see any other handsets I liked
I didn't want to pay the upfront cost of the new handset and didn't want a new handset
My handset is locked to my current network
It was too much hassle to cancel my current service

Q3. Was there anything else (not mentioned above) that made you decide to stay with your existing mobile network provider? **PLEASE WRITE IN BELOW**

Q4. And which of ONE of the above (at Q2 or Q3) was the main factor that made you decide to stay with your existing mobile provider? **PLEASE WRITE IN BELOW**

--

Q5. In your efforts made to assess your options, leading up to your decision not to switch, which, if any, of these did you experience particular difficulty with...?

PLEASE TICK ALL THAT APPLY

Comparing what different providers are offering
Understanding the relevant steps required to switch provider
Finding time to research the market
Paying the charge to exit your contract early
Contacting your current provider
Contacting potential new providers
Avoiding your current provider's attempts to persuade you to stay
Cancelling your service
Getting the information you needed from your current provider
Paying the upfront cost of a new handset
Getting the switch to happen on the date you wanted
Unlocking your handset

Q6. Was there anything else (not mentioned above) that caused you particular difficulty when trying to switch? **PLEASE WRITE IN BELOW**

Questionnaire – non-switchers



Q7. And which of ONE of the above (at Q5 or Q6) was the main thing that caused you particular difficulty when trying to switch? **PLEASE WRITE IN BELOW**

Q8. When assessing your options, and deciding on whether to switch or not, did you have any contact with your current provider?

Yes	[]	Please go to Q9
No	[]	Please go to Q13

Q9. At what point did you contact your current mobile provider?

BEFORE I had looked at any alternatives / contacted any other providers
AFTER I had looked at alternatives and before I had made a <u>final</u> decision not to switch

Q10. Did you contact your current provider for any of the following reasons?
PLEASE SELECT ALL THAT APPLY

To cancel my service / give notice
To find out what I needed to do to change provider
To negotiate a better deal with my current provider
To find out about any charges for ending my contract early
To arrange the 'stop date' in order to avoid a break in service
To arrange the 'stop date' in order to avoid paying both providers at the same time
To obtain information about my contract e.g. my usage patterns / spend
To obtain a code to give to my new provider (PAC)
To find out when my contract ended

Q11. Was there anything else (not mentioned above) that explains why you contacted your current provider? **PLEASE WRITE IN BELOW**

Q12. And which of ONE of the above (at Q9 or Q10) was the main thing you had for contacting your current provider? **PLEASE WRITE IN BELOW**

Q13. Which of the following best describes how likely you would have been to keep your phone number if you had switched mobile network?

TICK ONE ONLY

I definitely would have kept my mobile number
I might have kept my mobile number
I definitely wouldn't have kept my mobile number
I don't know if I would have kept my number
I didn't know I could keep my phone number

Q14. What makes you say this?

That's it.

Thank you!



Appendix 4

- Recruitment screener

Recruitment screener



Hello. My name is _____ from _____.

We are conducting an important research study about mobile phones, on behalf of Ofcom which regulates the UK telecommunications industry. May I ask you a few questions?

REASSURE: Everything you say as part of the research will be entirely confidential. We are not trying to sell you anything, etc.

Q1. Firstly, we need to be sure that we recruit people who work in certain occupations. Could you please tell me if you, any members of your family or close friends work in any of the following areas?

A	<input type="checkbox"/>	Marketing or advertising	→	CLOSE
B	<input type="checkbox"/>	Market research	→	CLOSE
C	<input type="checkbox"/>	Journalism / Public relations / The media	→	CLOSE
D	<input type="checkbox"/>	Telecommunications industry, including broadband, mobile phones, TV, <u>in any capacity</u>	→	CLOSE
E	<input type="checkbox"/>	None of these	→	CONTINUE

Q2. Have you participated in any kind of market research in the past 6 months?

1	<input type="checkbox"/>	Yes	→	CLOSE
2	<input type="checkbox"/>	No	→	CONTINUE

Q3. Do you personally own, use and pay for a mobile phone?

<input type="checkbox"/>	Yes	CONTINUE
<input type="checkbox"/>	No	CLOSE

Q4. Which ONE of the following statements best describes your role when it comes to deciding on what mobile phone to pay for and use?

READ LIST. RECORD ONE RESPONSE.

A	<input type="checkbox"/>	I am the primary decision-maker for my mobile phone	→	CONTINUE
B	<input type="checkbox"/>	I share in the responsibility	→	SEEK REFERRAL
C	<input type="checkbox"/>	Others make the decision	→	SEEK REFERRAL
D	<input type="checkbox"/>	I don't have a mobile phone	→	CLOSE

IT IS ESSENTIAL THAT RESPONDENT IS THE PRIMARY DECISION-MAKER.

Q5. For your mobile phone that you personally own and use, who is your current network service provider?

EE / Orange / T-Mobile	<input type="checkbox"/>	CHECK QUOTAS AND CONTINUE
Virgin Mobile	<input type="checkbox"/>	
Tesco Mobile	<input type="checkbox"/>	
Vodafone	<input type="checkbox"/>	
Three / 3	<input type="checkbox"/>	
O2	<input type="checkbox"/>	CLOSE
Other	<input type="checkbox"/>	

Q6. Are you actively intending to switch your mobile phone network service to another provider within the next 6 weeks or so?

<input type="checkbox"/>	Yes	CONTINUE
<input type="checkbox"/>	No	CLOSE

Q7. You say that you actively intend to switch your mobile phone service. Thinking about how certain you are to switch and where you are with it, which ONE of the follow statements best applies? **READ OUT. SINGLE CODE ONLY**

1	<input type="checkbox"/>	I am determined to switch, know who I am going to switch to, and have already contacted my intended provider and / or my current provider	HOLD IN RESERVE BUT CHECK EXCLUSIONS ON PAGE 7
2	<input type="checkbox"/>	I am determined to switch, and know who I am going to switch to but have not done anything else yet.	CONTINUE BUT CHECK EXCLUSIONS ON PAGE 7
3	<input type="checkbox"/>	I have started looking into alternative providers but not contacted anyone yet	CONTINUE
4	<input type="checkbox"/>	I'm fairly sure I will switch but have not yet started looking into alternative providers	CONTINUE

Q8. What makes you want to switch your mobile phone provider? What is the main reason for wanting to do so? **WRITE IN VERBATIM. PROBE FULLY**

Recruitment screener



Q9. If you have given any thought to it just yet, which provider(s) are you likely to consider switching your mobile phone service to?

CODE ALL THAT APPLY

A	EE / Orange / T-Mobile	<input type="checkbox"/>
B	Virgin Mobile	<input type="checkbox"/>
C	Tesco Mobile	<input type="checkbox"/>
D	Vodafone	<input type="checkbox"/>
E	Three / 3	<input type="checkbox"/>
F	O2	<input type="checkbox"/>
H	Other [PLEASE WRITE IN] _____	<input type="checkbox"/>
I	Don't Know / Can't say	<input type="checkbox"/>

INTERVIEWER CHECK:

CHECK QUOTA FOR CURRENT PROVIDER (Q5):	EXCLUSIONS
Orange	EXCLUDE IF CERTAIN TO SWITCH (CODE 1 OR 2 AT Q7) AND INTENDING TO SWITCH TO 'EE' (Q9)
T-Mobile	EXCLUDE IF CERTAIN TO SWITCH (CODE 1 OR 2 AT Q7) AND INTENDING TO SWITCH TO 'EE' (Q9)

ASK ALL

Q10. Which ONE of the following best describes the way you currently pay for your mobile phone service? **READ OUT – SINGLE CODE ONLY**

A	<input type="checkbox"/> A monthly contract	GO TO Q11	
B	<input type="checkbox"/> Pay-As-You-Go (PAYG)	GO TO Q14	
C	<input type="checkbox"/> A 30 day rolling contract SIM-only deal	GO TO Q11	MAX 10 in sample

ASK Q11 IF MONTHLY CONTRACT OR SIM ONLY AT Q10 – OTHERWISE GO TO Q14

Q11. For your current mobile phone service, do you know if you are still in contract?

A	<input type="checkbox"/> Still in contract	GO TO Q12
B	<input type="checkbox"/> Out of contract	GO TO Q15
C	<input type="checkbox"/> Not sure / no idea	

Q12. How long is left to run on your contract?

A	<input type="checkbox"/> On a 30 day rolling contract	GO TO Q15
A	<input type="checkbox"/> Less than a month	
B	<input type="checkbox"/> 1 to 2 months	GO TO Q13
C	<input type="checkbox"/> 3 months or more	
D	<input type="checkbox"/> Don't know / can't say	

Q13. Even though you are still in contract, are you actively seeking to switch within the next 6 weeks or so?

A	<input type="checkbox"/> Yes	GO TO Q15
B	<input type="checkbox"/> No	CLOSE
C	<input type="checkbox"/> Don't know / can't say	CLOSE

ASK Q14 IF PAYG AT Q10 – OTHERWISE GO TO Q15

Q14. When it comes to switching your mobile phone service, do you plan to keep your mobile number / take it with you to your next provider?

A	<input type="checkbox"/> Yes	GO TO Q15
B	<input type="checkbox"/> No	CLOSE

IF ON PAYG, THEY MUST BE PLANNING TO KEEP THEIR NUMBER WHEN THEY SWITCH

ASK ALL

Q15. Which one of the following age categories do you fall into? **Record Exact:**

.....

A	<input type="checkbox"/> Younger than 18 years	→	CLOSE
B	<input type="checkbox"/> 18 to 24	→	PLEASE ENSURE A GOOD SPREAD & CONTINUE
C	<input type="checkbox"/> 25 to 34 years	→	
D	<input type="checkbox"/> 35 to 44	→	
E	<input type="checkbox"/> 45 to 54	→	
F	<input type="checkbox"/> 55 to 64	→	
G	<input type="checkbox"/> 65 to 74	→	
H	<input type="checkbox"/> 75 or older	→	

Q16. What, if any, is the occupation of the chief income earner in your household?

(IF RETIRED, THEN PLEASE ASK: What, if any, was the occupation of the chief income earner in your household?) **TO OBTAIN AN ACCURATE MEASURE OF SOCIAL GRADE, PLEASE PROBE FOR:** position / rank / grade, industry, qualifications and number of staff responsible (if any)

1	<input type="checkbox"/> A	PLEASE ENSURE A GOOD SPREAD AND CONTINUE
2	<input type="checkbox"/> B	
3	<input type="checkbox"/> C1	
4	<input type="checkbox"/> C2	
5	<input type="checkbox"/> D	
6	<input type="checkbox"/> E	THANK & CLOSE
7	<input type="checkbox"/> Refused / not stated	

Recruitment screener



ASK ALL

Q17. Our study is all about switching mobile network providers, from the very start point of you thinking about the idea of it, before actually doing anything. We'd like to invite you to participate in our study but, to do so, we would need to ask you to hold off making any contact with either your current provider or your intended new provider until we convene a focus group that we would ask you to attend. This will be on [state the date of the group]. If you are able to attend on this date, would you be willing to not do anything further until we meet with you at this group?

A	<input type="checkbox"/>	Yes, I am happy to wait	GO TO Q18
B	<input type="checkbox"/>	No, I need to get on with it now	HOLD IN RESERVE*

* Please discuss the details with us so that we can determine how best to include these kinds of people, e.g., those who want to take advantage of a special offer that will end if they don't act soon.

Q18. Do you have regular access to the Internet and email?

A	<input type="checkbox"/>	Yes	GO TO INVITE
B	<input type="checkbox"/>	No, I am not online	

INVITE

We would like to invite you to participate in our market research study. This will involve you in the following . . .

- Coming along to a focus group, lasting about 40 minutes, being held on [DATE / TIME]
- Filling in a diary, in the period after this focus group, to tell us about the steps you have taken in switching your service. Full details of this would be given when we meet you at the focus group
- Coming back to a focus group, lasting about 75 minutes, which is likely to take place on a date in [TARGET WEEK]. (The exact date is to be confirmed.)

We'd be really pleased if you can take part. In return, we would offer you a total of £xx for your participation. £xx would be paid to you after the initial focus group and £xx would be paid to you at the end of the reconvened focus group.

If you are willing to take part, we really need to be sure that you can commit to **all** stages in the project described above. Are you willing and able to commit fully?

- YES [] – **CHECK QUOTA – AND CONTINUE**
- NO [] – **RECORD REASON**

RECORD DETAILS – AND SEND INVITATION

TITLE: FORENAME:

SURNAME:

ADDRESS:

POSTCODE:

TEL:

MOBILE NO :

EMAIL

INTERVIEWER: PLEASE CONFIRM EMAIL ADDRESS

