Ofcom
Disabilities Mystery Shopping – MAIN REPORT

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Ofcom

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1. - Background, Objectives and Method

1.1. Background

In 2009-10, Continental Research carried out mystery shopping on behalf of Ofcom, to determine what information the major fixed and mobile telecoms providers provide to consumers with disabilities about products and services that are designed to benefit them. This followed similar research conducted in 2004 and 2006.

The following eight providers were selected for assessment on the basis of having more than 5% market share (at the time the research was commissioned):[1]

- BT
- Orange
- O2
- TalkTalk
- T-mobile
- Virgin Media
- Vodafone
- 3

This report looks at the findings across these providers.

1.2. Objectives

Ofcom was particularly interested to see which of the services mandated under General Condition 15 were mentioned by the providers, both spontaneously and

[1] 5% of each relevant market – fixed and mobile telephony. Source: Ofcom technology tracker survey

after being prompted by mystery shoppers, to consumers who are (or are calling on behalf of people who are):

- Blind/visually impaired
- Deaf/hard of hearing
- Cognitively impaired or in hospital long term

For each of the types of disability under consideration, there was a set of specific mandated service aspects that Ofcom wished to see if providers offered when it was appropriate to do so:

Blind/visually impaired:

- Free directory enquiries (195)
- Through-connection
- Bills/contracts in Braille
- Bills/contracts in large print
- Priority fault repair

Deaf/hard of hearing:

- Access to text relay service
- Special tariff/money back scheme
- Priority fault repair (fixed line only)

Cognitively impaired or in hospital long term:

- Third party bill management
- Priority fault repair

This report focuses on **the specific mandated services** only, and not other services spontaneously mentioned by telecoms providers.

1.3. Method

The mystery shopping research, conducted from 23 September 2009 to 12 February 2010, employed multiple forms of contact to test the availability of services for people with disabilities.

In total, across all providers, 1,377 mystery shopping contacts (telephone or email) were made as follows:

- Quantitative research consisting of 1,271 telephone calls (approximately 150 per provider) was conducted to enable relatively robust comparisons between providers to be made.
    - Includes 51 Text Relay calls (a relay assistant based in a call centre voices over what the deaf person types and types back what is said)
- Additional qualitative research was undertaken to evaluate the responses received when each provider was contacted via email (or their website). 105 contacts were made via email/website contact form (15 per provider, except for Virgin).
    - Email results are not included within main telephone results reported below

In addition there was also a one-off assessment of each provider's website to get a feel for the quality and quantity of information about services for disabled people that is readily available online.

In order to avoid detection, mystery shopper calls were rotated between daytime and evenings, and weekdays. Calls were made from a mixture of landline numbers, prepaid calling cards and mobiles with unregistered SIMs, and the number of calls per week was kept low.

All mystery shoppers posed as potential customers or relatives of potential customers.

1,271 mystery shopper contacts (excluding email) were made as follows:

Disability	
Blind/visually impaired	430
Deaf/hard of hearing	441
Cognitive problems/in hospital long term	400

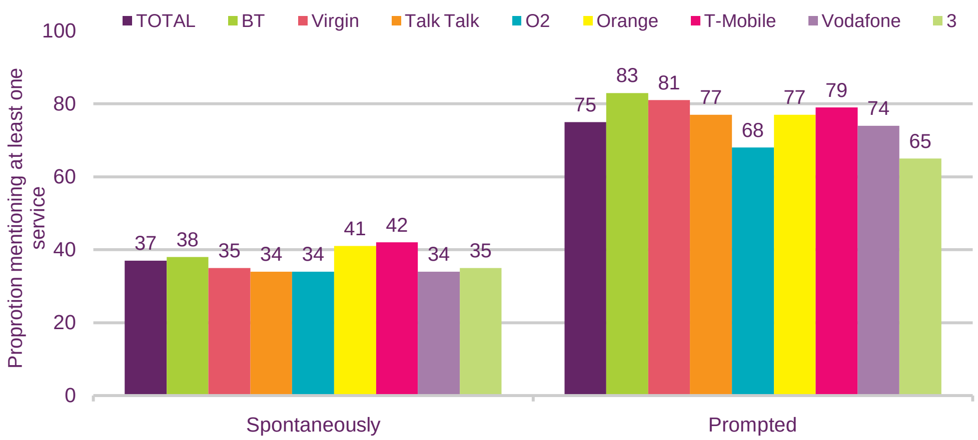
2. Summary of overall performance

This section examines the overall mystery shopping findings from the telephone contacts.

Across all of the eight providers in 2010, in just over a third (37%) of all mystery shopper calls at least one mandated service was spontaneously mentioned. This was a statistically significant **rise** since the previous wave in 2006, when at least one mandated service was spontaneously mentioned in 29% of calls. There were no statistically significant differences between providers' spontaneous responses.

In total (either spontaneously or after prompting), at least one mandated service was mentioned in three-quarters of all calls across the other providers (see figure 1). This was a significant **drop** since 2006, where 91% mentioned at least one service after prompting. All providers surveyed performed less well than in 2006 on prompted mentions. Spontaneous and prompted mentions of two or more services were lower.

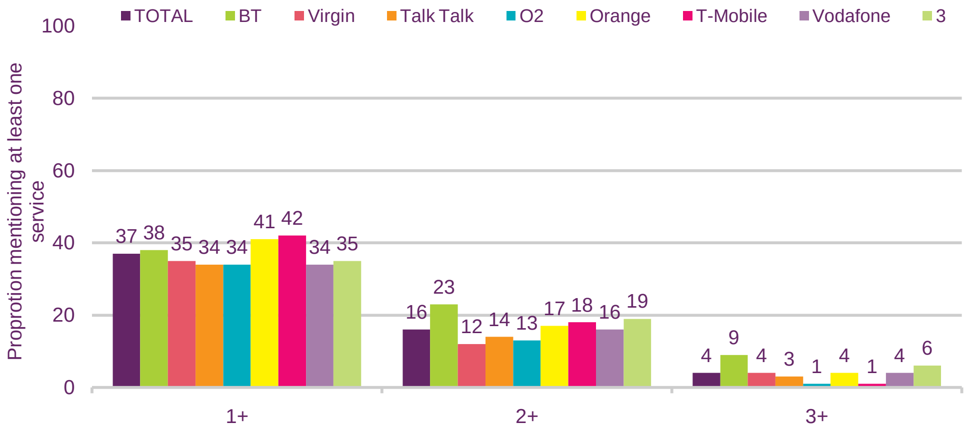
Figure 1: Proportion of all calls in which at least one mandated service was mentioned



Source: Q11/12/14/15/18/19
Base: 1271. All phone calls to each provider

The proportion of calls in which two or more mandated services were mentioned fell to 16% on average, and in just 4% of calls on average were three or more mandated service mentioned (see figure 2). These figures represent no change since the 2006 wave. BT was significantly more likely than other providers to mention more than one mandated service spontaneously.

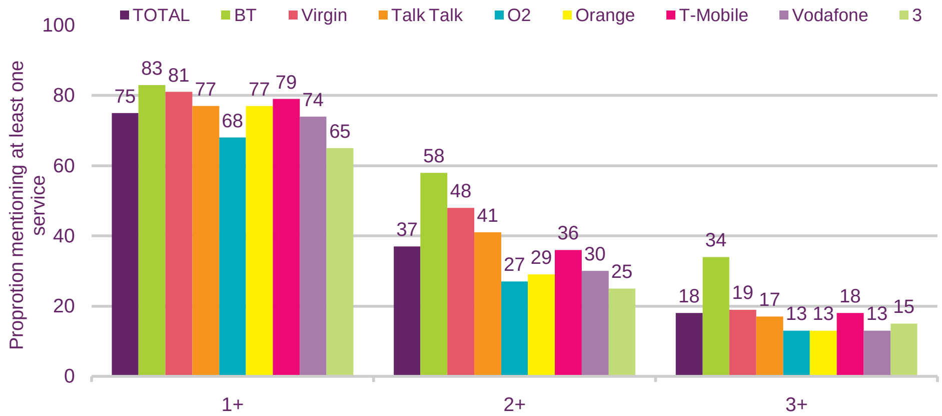
Figure 2: Proportion of all calls in which one or more mandated services were mentioned spontaneously



Source: Q11/14/18
Base: 1271. All phone calls to each provider

After prompting, just over a third (37%) of all calls led to two or more mandated services being mentioned, and in one in five (18%) of calls were three or more mentioned (see figure 3). These both represent drops (as an average of the providers surveyed) since the previous wave.

Figure 3: Proportion of all calls in which one or more mandated services were mentioned, including after prompting



Source: Q11/12/14/15/18/19
Base: 1271. All phone calls to each provider

All providers were worse in 2010 after prompting where a comparison could be made (see figure 4). (NTL and Telewest are both now part of Virgin so Virgin has been compared with them; 3 and TalkTalk were not included in the 2006 research.)

Figure 4: Proportion of all calls in which <u>at least one</u> mandated service was mentioned, including after prompting

Source: Q11/12/14/15/18/19
Base: 1271. All phone calls to each provider

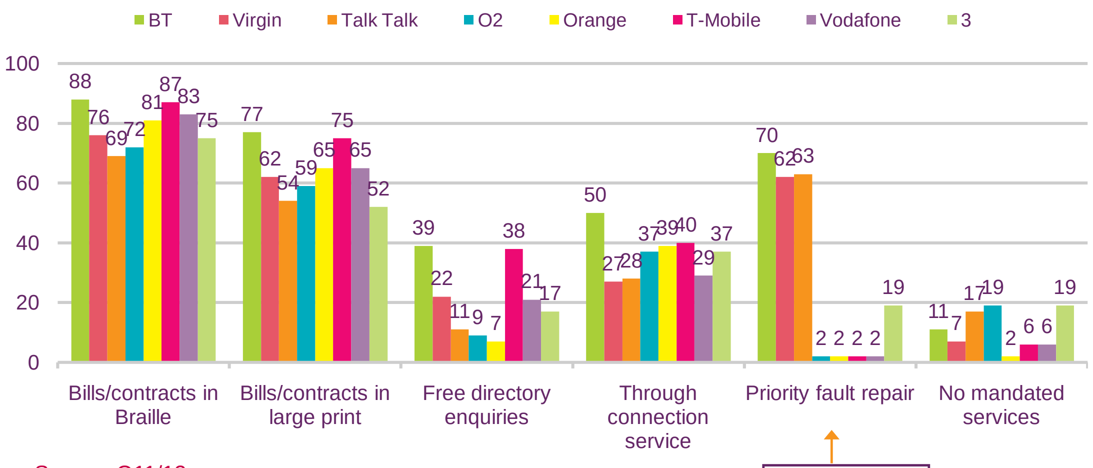
3. Blind/visually impaired consumers

This section specifically examines the results of the telephone contacts enquiring about the services provided for people who are blind or visually impaired.

Where visual impairment was mentioned by the mystery shoppers, providers were more likely to offer at least one mandated service than when other disabilities were mentioned. This may reflect the fact that there are more services mandated that benefit visually impaired customers.

For blind/visually impaired consumers, bills and contracts in Braille or large print were the two most commonly mentioned services overall compared to the other mandated services, in both 2006 and 2010 (see figure 5). There were some significant shifts amongst the lesser mentioned services (priority fault repair and free directory enquiries), and overall providers were significantly **more** likely to mention at least one mandated service in 2010 than in 2006. However, even after prompting, free directory enquiries were only offered in 21% of the calls (70% in 2006) and 19% of the mystery shopping enquiries on behalf of visually impaired customers resulted in the mystery shopper being told that there were no special services for disabled customers.

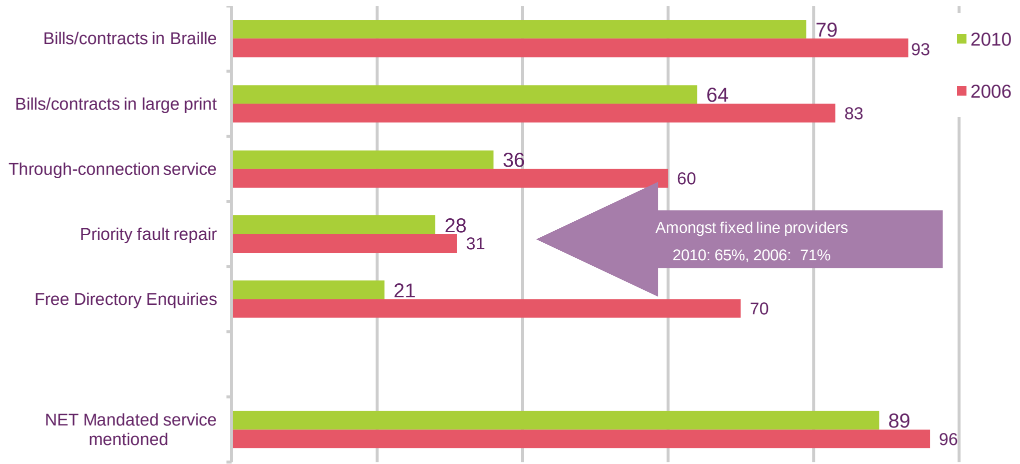
Figure 5: Provider comparison: services mentioned (including after prompting) for blind/visually impaired consumers



Source: Q11/12
Base: Blind/visually impaired phone calls (430)

When prompted, 89% of calls to providers on behalf of visually impaired consumers resulted in at least one mandated service being mentioned, with alternative format bills and contracts again the two most mentioned individual services (see figure 6). This was a significant drop since 2006, with free directory enquiries and through-connection showing the biggest decline (see figure 7).

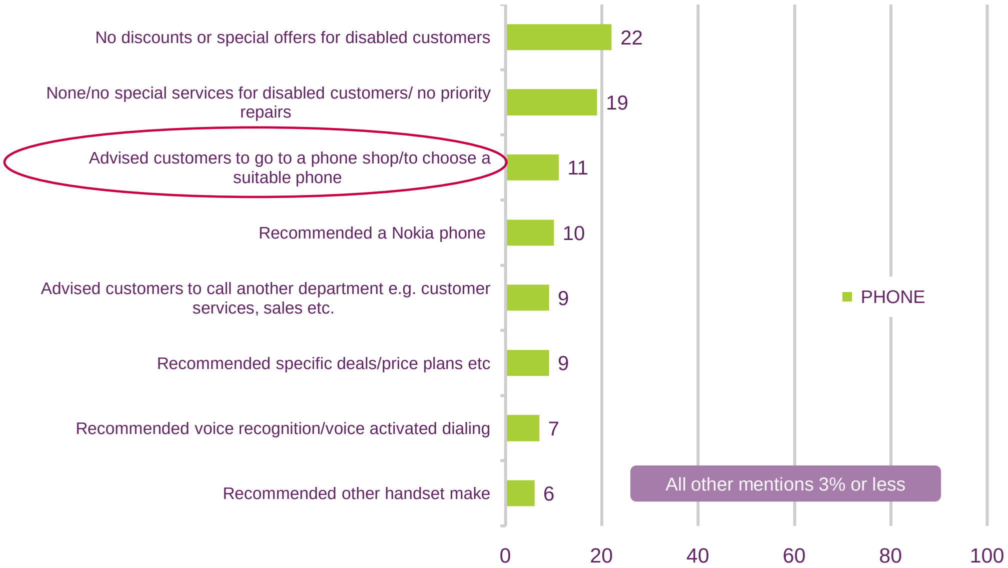
Figure 6: Total services mentioned (including after prompting) for blind/visually impaired customers



Source : Q11/Q12 All services mentioned including after prompting
Base : Blind/visually impaired phone calls – 2004 (70), 2006 (350), 2010 (430)

In some cases, call handlers offered additional information, for example in relation to handsets. However, in 22% of calls the caller was told that there were no discounts or special offers for disabled people and in 19% of calls the caller was told that there were no special services for disabled consumers and no priority fault repair (see figure 7).

Figure 7: Additional information provided



Source : Q13 What other advice did the operator offer for blind/visually impaired customers?
Base : Blind/visually impaired phone calls (430)

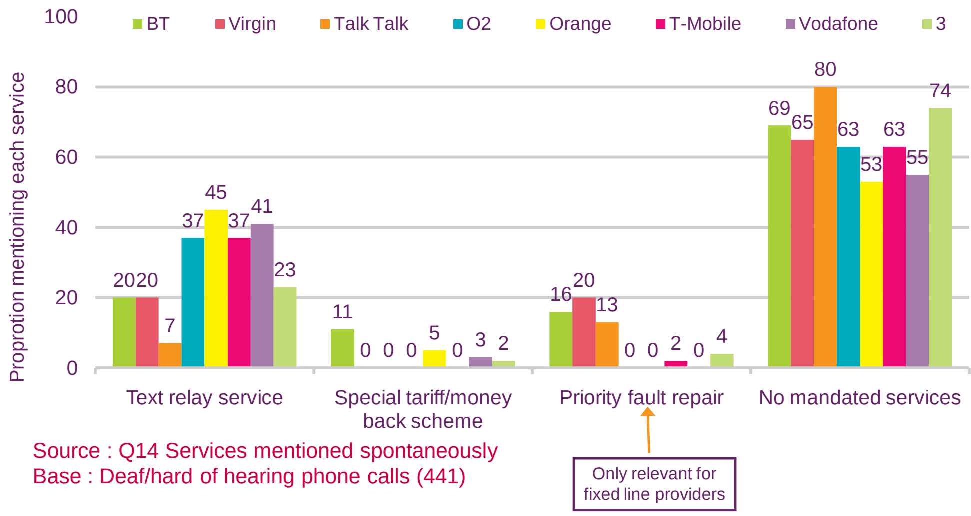
4. Deaf/hard of hearing consumers

This section examines the results of the telephone contacts enquiring about the services provided for those who are deaf or hard of hearing.

The text relay service was spontaneously mentioned in over a quarter (29%) of calls, but the other two relevant services were mentioned spontaneously in less than one in 10 calls (see figure 8). Rebates for text relay calls were mentioned in 3% of mystery shopping calls (5% in 2006) and in calls to fixed line providers, priority fault repair was mentioned 17% of the time (7% in 2006).

Overall, slightly over a third (35%) of calls resulted in a mandated service being spontaneously mentioned – a slight but not significant increase over 2006.

Figure 8: Provider comparison: services mentioned <u>spontaneously</u> for deaf/hard of hearing consumers



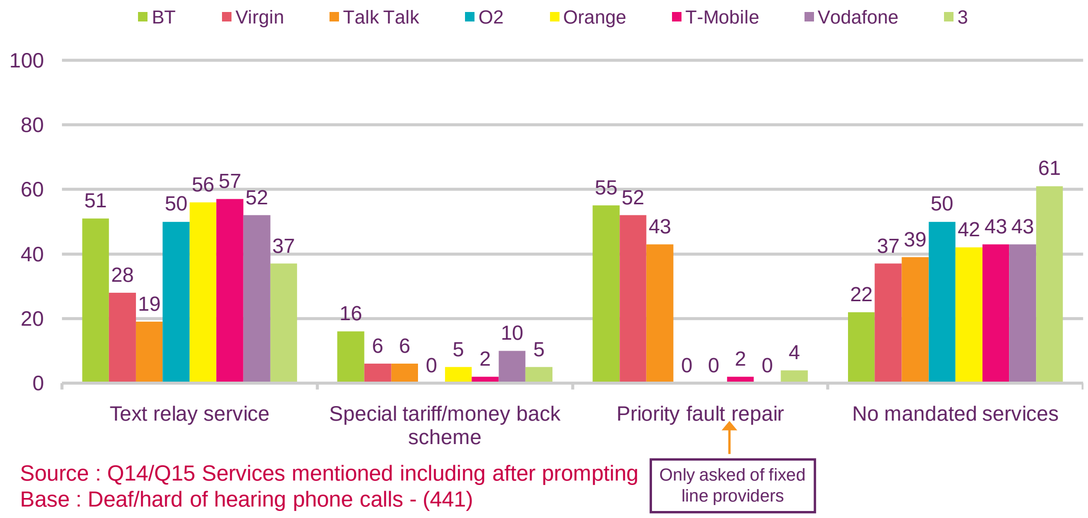
Source : Q14 Services mentioned spontaneously
Base : Deaf/hard of hearing phone calls (441)

The most commonly mentioned service for deaf consumers was text relay. However, this was only mentioned 49% of the time on average even after prompting (78% in 2006). Rebates for users of text relay were only mentioned 6% of the time (33% in 2006) (see figure 9).

18% of callers were specifically told that there were no discounts for disabled customers. 22% of callers were told that there were no special services for disabled customers (see figure 11).

NB: text relay was not asked about by the mystery shoppers in the 51 text relay calls that were made (approximately six per provider) as it would have been obvious that the shopper was already using that
service.

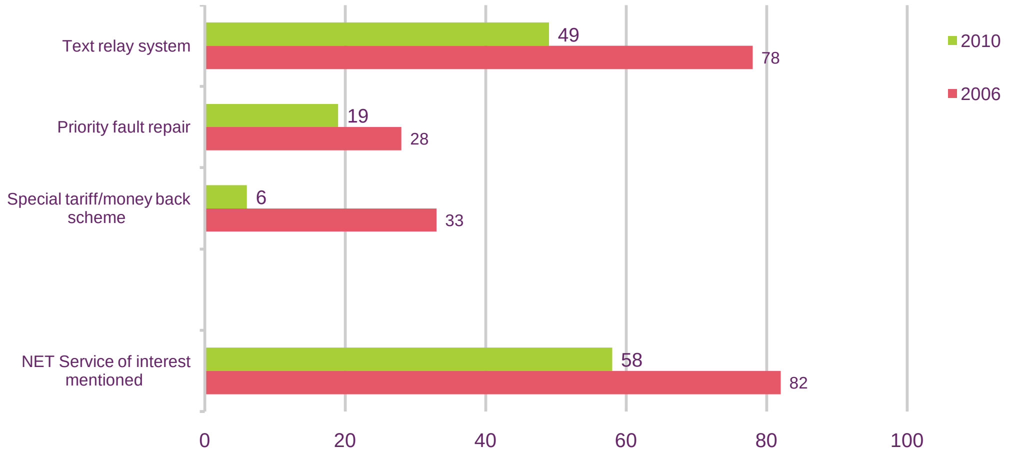
Figure 9: Provider comparison: services mentioned (including after prompting) for deaf/hard of hearing consumers



Source : Q14/Q15 Services mentioned including after prompting
Base : Deaf/hard of hearing phone calls - (441)

All mandated services for deaf/hard of hearing customers showed a significant drop in mentions since 2006, and the proportion of calls where any services were mentioned fell from 82% to 58% (see figure 10).

Figure 10: Total services mentioned/confirmed (including after prompting) for deaf/hard of hearing customers



Source : Q14/Q15 All services mentioned including after prompting
Base : Deaf/hard of hearing phone calls - 2006 (350), 2010 (441)

Figure 11: Additional information provided (by all providers)

Source : Q16 What other advice did the call handler offer for deaf/hard of hearing customers?
Base : Deaf/hard of hearing phone calls (441)

4.1. Text relay calls

A total of 51 calls were made via text relay (approximately 6 per provider). There was a wide variety in the responses from individual call handlers. Some were extremely helpful and sympathetic, whereas some were blunt, or even came across as rude. On a number of occasions it appeared that the call handler just hung up on the call (this wasn't particular to any individual provider).

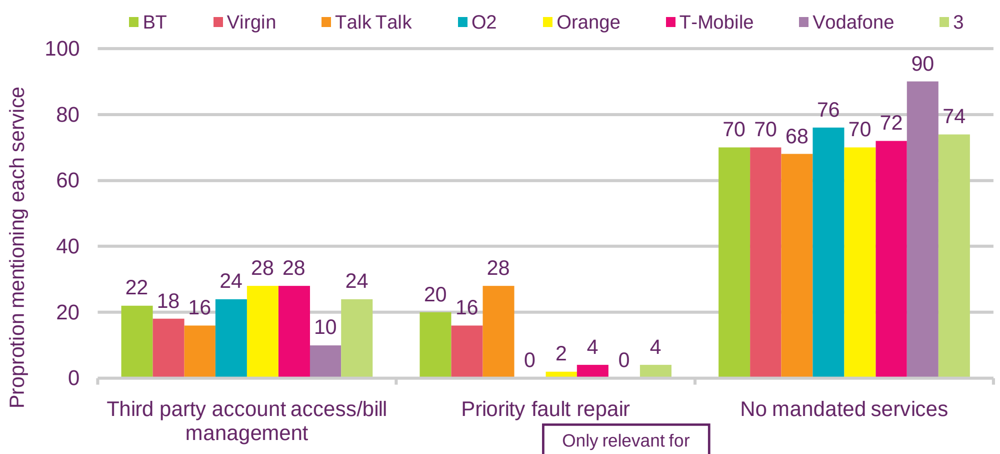
However, there were no significant differences between the amount of information provided when contacted by telephone in a voice call or via text relay, and there were no notable differences between providers (but because there were only approximately 6 text relay calls per provider it would be hard to discern any differences between them).

5. Cognitive problems/long term hospital stay

This section provides the results for the final area of telephone contact - services for those with cognitive problems or long term hospital patients. This was the least well known area with regard to spontaneous knowledge. Overall, just a quarter (26%) of calls resulted in at least one service being mentioned spontaneously (see figure 12). However this was a significant increase over 2006, when less than one in 10 (9%) mentioned any services.

Just over one in five (21%) of calls resulted in the mystery shopper being spontaneously informed about third party account access/bill management, and 21% were told about priority fault repair (fixed line providers only).

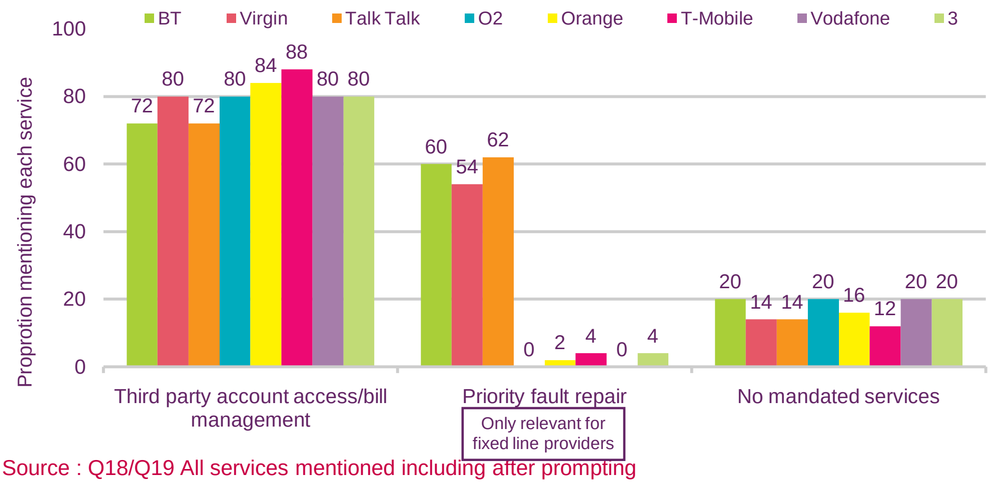
Figure 12: Provider comparison: services mentioned <u>spontaneously</u> for customers with cognitive problems/ in hospital long term



Source : Q18 Services mentioned spontaneously
Base : Cognitive problems/long term hospital patient calls 2010 (400)

After prompting, the proportion of calls in which third party bill management was mentioned increased significantly (from 21% when asked about spontaneously to 80% when prompted).

Figure 13: Provider comparison: services mentioned (including after prompting) for customers with cognitive problems/ in hospital long term

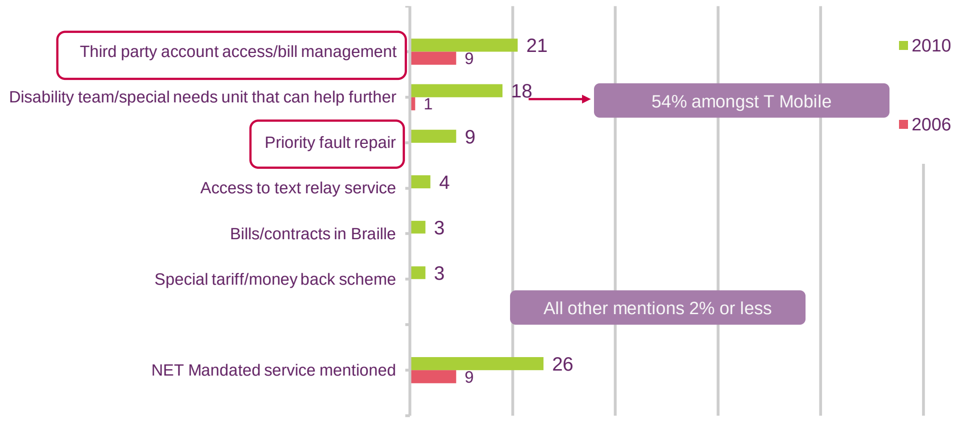


Source : Q18/Q19 All services mentioned including after prompting
Base : Cognitive problems/long term hospital patient calls (400)

Overall, at least one mandated service was mentioned in 83% of calls - a fall since 2006, even though priority fault repair was not asked about in the last wave (see figures 13 and 14). Priority fault repair was mentioned 59% of the time after prompting (fixed line providers only).

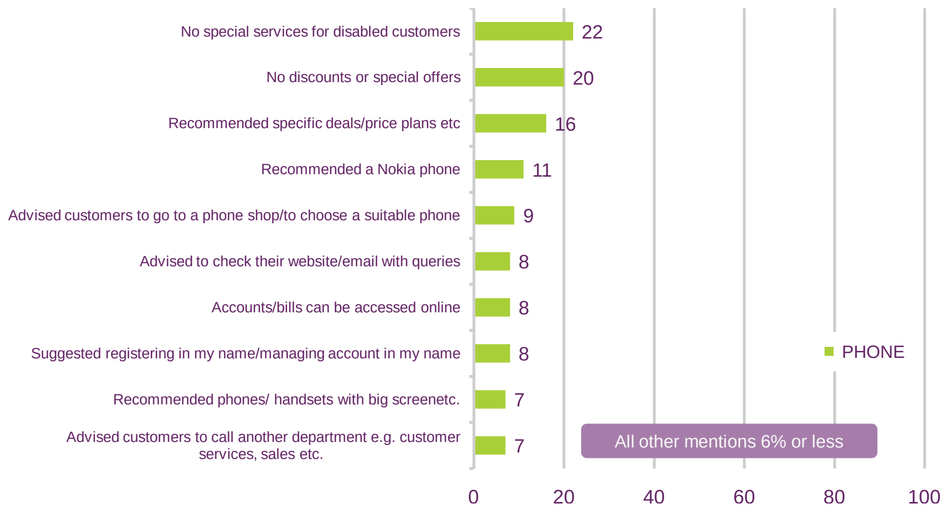
Again, many callers were told that there were no special services for this group of customers (22% of calls) or no discounts or special offers (20% of calls).

Figure 14: Services mentioned (spontaneously) for customers with cognitive problems/in hospital long term by all providers



Source : Q18 Services mentioned spontaneously
Base : Cognitive problems/long term hospital patient scenarios – 2006 (350), 2010 (400)

Figure 15: Additional information provided (by all providers)



Source : Q20 What other advice did the call handler offer for customers with cognitive problems, or long term hospital patients?
Base : Cognitive problems/long term hospital patient calls (400)

6. Contact via email

15 emails (5 for each disability) were sent to each of 7 of the providers, to an enquiries email address (or similar) sourced from their website (Virgin did not have a method for non-customers to contact them electronically). Each email contained a brief enquiry/request for general information. Out of a total of 105 emails, 71 received a non-automated reply within the fieldwork period. An average of 4 days passed from each email being sent until a reply was received.

Overall, less information was provided by email than over the phone, even though the providers would have had more opportunity to research the answers than when dealing with telephone enquiries (see figures 16, 17 and 18).

Two-thirds of replies gave a URL or website address where further information could be found, and just over half gave a phone number to contact for further information. However the majority of these were for general information rather than specifically disability-related.

Although email replies were generally clear and easy to understand, this was largely due to the lack of detailed information provided. Mystery shoppers were asked to rate the clarity and ease of understanding of the replies, on a scale of 1-5 (where 1 was not at all clear and easy to understand, and 5 was very clear and easy to understand). The average score across all providers was just under 4, and there was minimal difference between each of the individual providers' scores.

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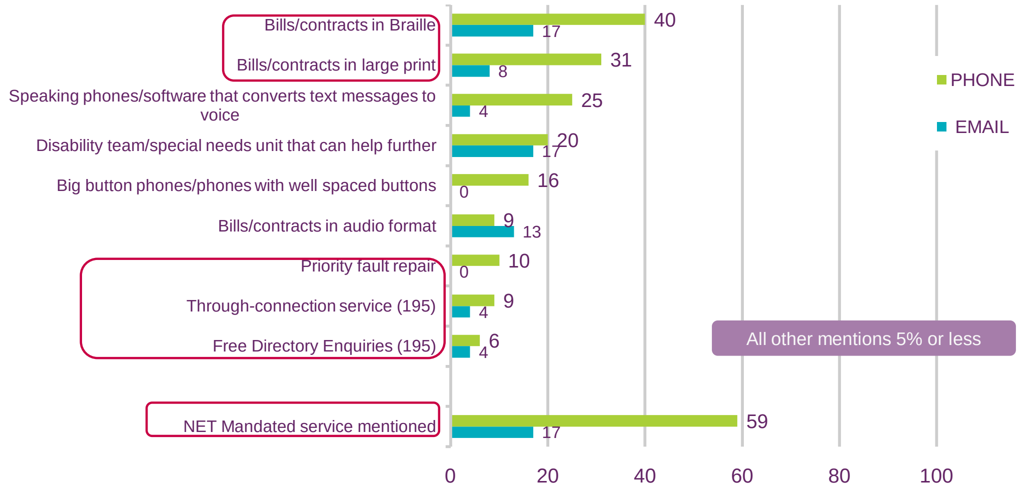
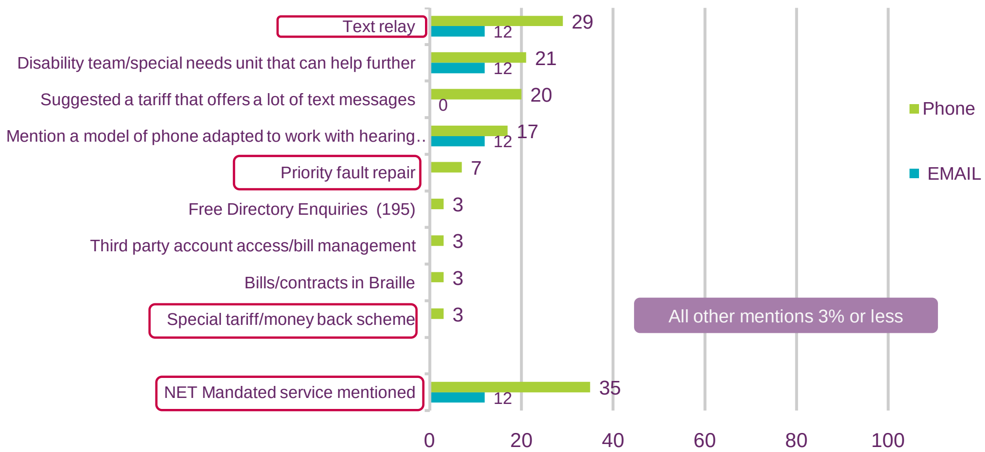
Figure 16: Services mentioned (spontaneously) for blind/visually impaired customers by all providers: phone vs. email



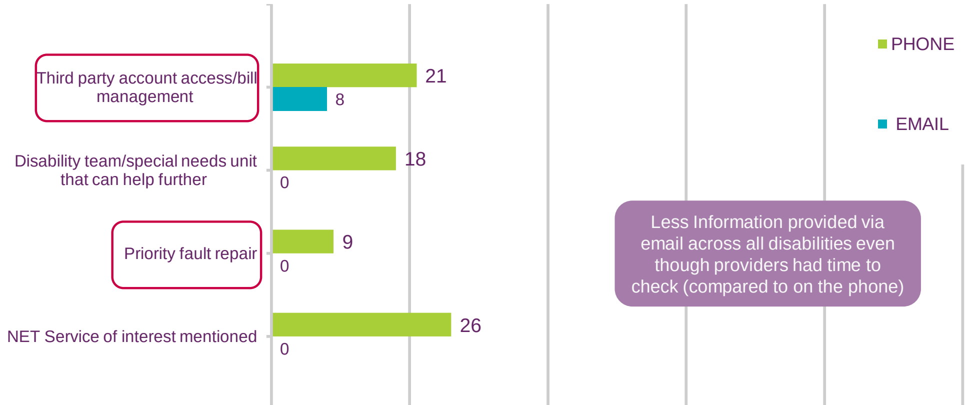
Source : Q11 Services mentioned spontaneously
Base : Blind/visually impaired phone calls/emails –(430/24 – **note very low base size for email**)

Figure 17: Services mentioned (spontaneously) for deaf/hard of hearing customers by all providers: phone vs. email



Source : Q14 Services mentioned spontaneously
Base : Deaf/hard of hearing phone calls/emails – (441/)

Figure 18: Services mentioned (spontaneously) for customers with cognitive problems/in hospital long term by all providers: phone vs. email



Source : Q18 Services mentioned spontaneously
Base : Cognitive problems/long term hospital patient calls/emails, (400)

7. Website assessment

7.1. Method

Each provider's website was also evaluated to see if it contained relevant information for customers with disabilities. The research was a qualitative exercise, with each site assessed once within a limited period of time, so the scores are representative of one person's experience on the day that the assessment was conducted.

The main aims of the website assessment were to evaluate:

- How easy it was to find this information from the home page
- What sort of information was returned when specific key words were searched for

A dedicated mystery shopper evaluated all sites to allow consistent comparisons, using the process as follows:

- Start on home page
- Find search box
- Search for each of the relevant words and phrases (Disabled; Disability; Help for disabilities; Deaf; Hard of hearing; Blind; Visually impaired; Cognitive problems; Hospital stay)
- They then used their initiative to try to find additional relevant information
- A minimum of 20 minutes was spent per site (unless all information was found)
- A maximum of 30 minutes was spent per site

The mystery shopper then filled in an evaluation form for each website.

7.2. Findings

The results for the search terms varied from website to website, with some providing highly relevant links for particular terms, and some not providing any links at all. The search terms *'hospital stay'* and *'cognitive problems'* didn't provide any information on any of the sites and the mystery shopper was not able to find any mention of special tariffs or rebates for textphone users on any website (within the parameters of the exercise).

The websites were also assessed with regard to the **clarity** of information provided and how **easy** it was to find on each provider's website, across the differing disabilities. As previously mentioned, the mystery shopper initially searched for specific words and phrases, and then, if necessary searched the site further (for up to 30 minutes) until the relevant information was found. Information was then rated on a scale of 1 to 5 (where 1 = not at all, and 5 = very), firstly for how clear and easy to understand it was, and then how easy it was to find. The average scores across all the websites are shown on the chart below.

The following table gives a breakdown of the total number of websites that featured any information about the relevant service for each specific disability. Free directory enquiries, bills/contracts in Braille or large print, and access to text relay services were the most frequently mentioned.

	Blind/visually impaired	Deaf/hard of hearing	Cognitive impairment/long term hospital stay
Free Directory Enquiries	5	N/A	N/A
Through-connection service	2	N/A	N/A
Bills/contracts in Braille	4	N/A	N/A
Bills/contracts in large print	4	N/A	N/A
Priority fault repair (fixed line only)	2	2	2
Access to text relay service	N/A	4	N/A
Special tariff/money back scheme	N/A	0	N/A
Third party account access/bill management	N/A	N/A	1
TOTAL	17 (out of 35 possible services that could have been mentioned)	6 (out of 19)	3 (out of 11)

8. Summary and conclusions

8.1. Current performance on mandated services

Just over a third of callers were spontaneously provided with information on at least one mandated service.

When call handlers were prompted (with minimum detail), three-quarters of callers were provided with information on at least one mandated service. However, they did not necessarily receive information on all the mandated services that would have benefited them or the person on whose behalf they were calling.

With regard to level of mandated information provided, provider performances vary from disability to disability, and from service to service.

Some providers stood out as offering a better response, particularly on some services, but no single provider stood out as offering a significantly worse response than the average.

8.2. Performance on mandated services - 2010 vs. 2006

Providers had improved their performance when asked for information spontaneously (industry average increased from 29% in 2006 to 37% in 2010).

However when prompted, providers performed less well (decreased from 91% to 75%).

No single provider is primarily responsible for the overall drop – performance is lower across all of them.

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