

22086 Ofcom Switching In-home Depths Discussion Guide – Active Considerers - Final

One of the key objectives for the qualitative research is to feed into the development of quantitative questionnaire. As such it is important to gain insights on the following; perceptions of barriers & benefits to switching, the dynamics & trade offs in choosing a bundle of services, consumers experience of specific switching processes (C&R and/or GPL), identifying the nature and magnitude of any consumer harms and terminology used when discussing switching.

Introduction

- Moderator to introduce themselves/BDRC Continental as independent researcher.
- Provide necessary assurances regarding confidentiality / MRS Code of Conduct
- Explain purpose of research: Understand the reasons why and how consumers chose communication services & packages, including any perceptions and experience of switching
 - *NB: Focus is NOT on mobile for this research (except where quadplay)*
- Reassurances:
 - No right or wrong answers
 - Just interested in opinions / reactions
 - Not here to sell you anything
- Explain structure of visit and arrange as convenient

Structure - broadly

- Main decision maker first – 40-50 mins
- Other household – next / during – 10-15 mins each
- Group immersion session – 30 mins

NB: We will need to be flexible about the structure for each visit.

- *Where there is a key decision maker; the person who chooses services and pays for them; we will want to speak to this person first*
- *For a group of friends sharing a flat, it would make more sense to run a group session first and then catch up with the individuals afterwards*
- *Inevitably, the respondents will also have a view on what works for them*

Individual interviews

Section 1: Respondent details *(With each household member)*

- Brief respondent introduction
 - Name
 - Tell me a bit about yourself: e.g. occupation, hobbies etc.
- In a typical day / week how long do you spend using communications services in the home - either watching TV / pay TV, OTT, playing games online, speaking on your landline or mobile (in home), using internet?
- Where / how do they do this? – ‘show and tell’

Main interview with decision maker – 40 mins

Current services

- Brief overview of current subscription of communications services (i.e. broadband / fixed voice / Pay TV / mobile voice/ OTT)
 - What services do you have currently?
 - Who supplies these services? How much do they cost monthly?
 - How long have you had these services? What did you have before this?
- Can you talk me through the decision making process for choosing the services you now have?
 - What were your thought processes / main considerations
 - What did you do first / next?
- Did you look at other services/ other providers? Where did you search for information? Trusted sources? How easy is it to obtain information?
- What are your impressions of what else is available versus what you currently have?
- If, for some reason, you decided you wanted to switch communication providers when could you do this?
 - **PROBE:** When does your contract run out? Is it the same date for all of your services or not?
 - What happens when the contract (s) expires? – i.e. do you intend to roll on / do you expect a contact from your provider(s) etc? Any perceptions of ETC charges/ notice periods etc?
 - If contract times / periods are different for LL/BB and Pay TV, when would be the logical time to consider other options? Do contracts ever end at the same time?
 -
 - How does this impact on your decision to switch in future?

Pre-task feedback

We asked you to think about switching communications services, to note down any experiences you have of switching and to find one or two images that expressed something for you about the process

For each image, briefly:

- Briefly explore the meaning / metaphor

Section 4a: Engagement 10m

You've told us that you have considered switching your communication provider. We'd like to understand the reasons why and where you are in your thought processes.

- What made you start to think about switching services
 - What, if anything, happened? What was the trigger (s) for this? – e.g. increased need, unhappy with services / customer service / better offers etc.
 - Explore whether impulse was push (poor service / not happy with channels etc.) or pull (better offer (price), new channels etc.)
 - If there was any communication from provider which triggered this – get an understanding of content / purpose of communication etc
 - Who in the household has suggested switching? Why? What discussions have taken place?
- How long have you been thinking about switching? Why?
- Is there any reason why you have to wait before you can switch? Why?
 - **IF NOT MENTIONED PROBE ON:** contracts / being out of contract. Different end dates to contracts? How did they find out about this? Check paperwork? Talk to their provider?

Section 4b: Assessment 10m

I'd now like you to tell us about what, if any, research or information gathering you have done

- How far did you get in your consideration process?
 - Elicit the story of where they have got to so far...
- Did you look for information? Where? What kind/type of information were you looking for? Why?
- How did you find out what else was available from other provider?
 - Information sources / usefulness / helpfulness
- What providers / services were you / are you considering? Why? – i.e. one provider / two providers?
- What, if anything, stopped you from considering some providers / other services?
- How easy / hard did you find it to compare providers and services? Why?

- Were you looking at switching single services (i.e. the elements not happy with) or only at packaged / bundled services (use respondent language here)? Why? Why not?
 - **PROBE:** on benefits / drawbacks of single, dual and triple bundled services
 - What do they call these? (packages, bundles, deals etc.)
 - Are they perceived as better value / discounted / how?
- Roughly how long did you spend thinking / looking? Was it hard / easy? Why?
- How far in the process did you get / what, if anything did you do?
- Did you communicate with your current provider or any other provider when you were considering switching? What happened? What happened next? **PROBE IN DETAIL**
- Where are you in your thinking now? Why have you not gone ahead with switching?

Section 4c: Action 10m

- What, if any past experience do you have of switching provider in communications / other services? What have these experienced been like?
- If you did decide to look at other provider or switch services, what would you do first? What would you do next?
- If you were thinking about switching, who would you contact / contact first (current provider / new provider) Why?
- How easy do you think it would be to switch providers? Why? Why not? What makes you think this?
 - **PROBE** around any perceptions of gaps in services? (Pay TV vs LL/BB) Would they expect these? What would they do in order to avoid these?
 - **PROBE** around any discussion of infrastructure changes / boxes and router changes / holes in walls etc.
 - **PROBE** if not contacted any providers including current provider, what is their perception around who they would need to contact first / second?
 - What were your expectations around how long it might take?
- Who would you need to speak with? How long do you think the process take? Why?
- What, if anything, puts you off switching? Why?
- What would make you consider switching? What elements of this are most important to you?
- Do you have a fixed idea of what you would want if you did switch, or are you still considering different options?
- Ideally, what service or package of services would you have in your home? Why?
- What, if anything, stops you from getting this?

Section 4d: completion – 20m

n/a

Section 5: Priorities in the process 10m

I'd now like you to think about the process of switching itself; about what actually happens once you start making the arrangements to disconnect or connect services?

- When you think about switching broadband and landline and Pay TV, which of these factors are the most important?
- SHOW FEATURES ON CARDS NEXT TO EACH OTHER – I.E. LIKE A FORM OF QUALITATIVE CONJOINT. ENSURE THAT OVERALL TIME IS COMPARED AGAINST HAVING THE PROVIDER SORT OUT AS ONE PAIR
 - The overall time taken to switch
 - Ease of switching
 - Avoiding gaps in services
 - Having the provider sorting out the switch for me
 - Sorting out the switch myself
 - Porting numbers

NB: key thing here it to explore the issue of time vs certainty – would they wait longer to have everything managed for them?

- Unpack if there is certainty/trust around switching in allowing a provider to manage this process?

Show options A (C&R) and B (GPL) (attachment) then probe around additions in A and B

- From your experiences in looking at switching communications services:
 - What would you tell other people?
- What, if anything, could work better about the process? Is there anything that could be done to make things easier for you to switch?
- How do you feel now about the services you have? Why?
- If you were explaining or giving advice to someone looking at switching their communication providers what would you tell them?
- Have you switched any other services (energy, banking, insurance)? How do you think switching communication providers would compare? How often do you switch?

Shorter interviews with other household members – 10 to 15 mins each

I'd like you to show me one of the communication devices you have in the home (TV, tablet, connected game etc.) you typically spend time on and whilst you do that I'm going to ask you some other questions.

- Which communications services do you most enjoy? Why?
- Since you've had the package of services you have now, how has your behaviour changed? What do you do now that you didn't before?
- Which services / content do you most enjoy? Why?
 - **PROBE:** As to whether this is paid for / free (OTT) content?
- Which are the most useful / essential for you? Why?
- Which services could you not live without? Why?
- Which services could you do without?
 - **PROBE:**
 - Importance of landline, TV subscription, OTT and broadband speeds
- What, if anything, would you like to be able to do or have access to that you don't have currently?
 - **PROBE:** Can friends / colleagues do things that they can't / watch things that they can't?
- What, if anything could be better about the communications services you currently have?
- Have you been involved in the decision to look at switching options and then not switch? Can you tell me about this? What stopped your household from switching in the end?

Household Session

Decision making – 15 mins

- How are decisions made in your household around what communications services in the home are needed?
 - Who is involved in the decision?
 - What role does each person play? (Who pays?)
 - What factors are taken into consideration?
 - What are the priorities for the household?
 - How are final decisions taken? What is traded off against what?
- For the provider (s) that you use, what are the key things that made you choose this / these providers?
- **PROBE AROUND:**
 - Cost / value
 - Convenience
 - Content
 - Speed of broadband
 - Availability?
- Was their one main thing that led your household to pick this communications bundle over the others? Why?
- How, if at all, could they be more suitable for you? **IF NOT SUITABLE:** what, if anything, stops you from considering other communication providers/ services?
- How do you find out what else is available from other providers?
 - How do you compare other offers with what you have and what else is available? How easy is this?

Content storage

- What, if any content do you have stored that is associated with your current provider? Where is this stored? What would happen if you were to switch? Why?

Bundled Services – 10 mins

- If you could design your own 'optimum solution' for your household what would it look like?
 - Is this currently offered by providers? What stops you from taking these services up?

You recently looked into switching, why did that process start and why did this not happen?

- PROBE as to the extent to which any perceived complexity in researching switching and actual switching / dealing with providers etc. prevents them from doing this?
- (if appropriate) Tell me about the choices you make with regards to using the same provider for two or three services versus using one
- **PROBE:** on benefits / drawbacks of single, dual and triple bundled services. What do they call these? (packages, bundles, deals etc.)

OTT services – 10 mins

- What OTT services do you use?
 - How is that distinction made? Does it all come as part of package? Subscription based? Pay additionally for it?
 - How would you describe those additional TV services? r?
- (Spontaneous) which? – and then show board (Prompted)?
 - *NB: Netflix, Now TV, Amazon Prime (BOARD?)*
- Why did you decide to have these additional channels?
- *NB: sometimes OTT channels are offered to customers as part of an upgrade deal*
- What, for you or your family, is the value in these additional channels?
- What would be the result if you didn't have these channels available?
 - i.e. PROBE on whether these are perceived as 'extra' channels or replacements – e.g. what does having Netflix or Amazon Prime mean on the PAYTV package you subscribe to? Probe: value/price points
 - *Have you switched OTT services? What was it like? Would you consider switching? What do you perceive OTT switching to be like?*
- *NB: need to explore how attached they are to these services and whether risk of losing them would put them off switching to another provider)*
- *Briefly mention interest in Quad bundles –*
- *Do they ever talk about switching communications to those outside of household?*

THANK AND CLOSE.

22086 Ofcom Switching Mini-Groups Discussion Guide – Active Considerers - Final

NOTE TO MODERATOR:

One of the key objectives for the qualitative research is to feed into the development of Quantitative Questionnaire. As such it is important to gain insights on the following; perceptions of barriers & benefits to switching, the dynamics & trade offs in choosing a bundle of services, how consumers experience specific switching processes (C&R and/or GPL), assessing consumer harms and terminology used when discussing switching.

Introduction - 5m

- Moderator to introduce themselves/BDRC Continental as independent researcher.
- Provide necessary assurances regarding confidentiality / recording / MRS Code of Conduct
- Explain purpose of research: Understand the reasons why and how consumers chose communication services & packages, including any experience of switching
- Reassurances:
 - No right or wrong answers
 - Just interested in opinions / reactions
 - Not here to sell you anything
- Length of group

Section 1: Respondent background – 5m

- Respondent introductions in pairs (moderator to include self if odd number)
 - Name
 - Household composition
 - Occupation
 - (ice breaker) How they use communications in the house – one that they are prepared to share – i.e. long video calls with mum / watching silly you tube video's etc.

Section 2: Re-cap on pre-task / current services – 10m

For the pre-task, we suggest supplying respondents with a self-complete diagram / list showing communications and devices used within the household including OTT and paid for content:

- I'd like you to each briefly describe your current household communications diagram, tell us a little about who uses and who watches what in your household
- Focus on:
 - Fixed line
 - Fixed broadband (Wi-Fi)
 - Pay TV
- What's the most important service for your household? What could you not do without? Is this the same service for everyone, or different for individuals within the household?
- What, if any elements are not as good as they might be / could be better? Why? How?
- What, if anything, would you like to be able to do / have access to that you don't have currently? What, if anything would you change from what you have if you were able to? Why?

Section 3: Perceptions on switching - UNPROMPTED – 5-10m

One of the main reasons we've asked you here this evening is to talk about switching communications services in the home; the reasons people decide to switch or not to switch and also the steps people go through in order to switch .

Before we look at this in more detail, I have a selection of images here, and I'd like you to select a couple of images which in some way express **a thought or feeling you have about your most recent experience of switching.**

NB: We have a large selection of non-literal / projective images which we can use for this. – a collection of projective – non-literal images – Visual Explorer

For each image selected:

- Explore meaning of image and (briefly) ladder up / down as appropriate
- Fully explore any examples – particularly around degree of choice experienced /felt by the consumer

As a group:

- What else comes to mind when we think about ...X (the element of switching raised by the respondent)
 - **CAPTURE ON FLIPCHART - DISCUSS**
- What other experiences do people go through when they switch suppliers for communications services in the home?

I'd like us to talk in more detail about your experiences of switching communications services in the home to another supplier.

Section 4a: Engagement

You've told us that you have considered switching your communication supplier. We'd like to understand the reasons why and where you are in your thought processes.

- What made you start to think about switching services
 - What, if anything, happened? What was the trigger (s) for this? – e.g. increased need, unhappy with services / customer service / better offers etc.
 - Who in the household has suggested switching? Why? What discussions have taken place?
- How long have you been thinking about switching? Why?
- Is there any reason why you have to wait before you can switch? Why?
 - **IF NOT MENTIONED PROBE ON:** contracts / being out of contract. Different end dates to contracts? How did they find out about this? Check paperwork? Talk to their supplier?

Section 4b: Assessment

I'd now like you to tell us about what, if any, research or information gathering you have done

- How far did you get in your consideration process?
 - Elicit the story of where they have got to so far...
- Did you look for information? Where? What kind/type of information were you looking for? Why?
- How did you find out what else was available from other suppliers?
 - Information sources / usefulness / helpfulness
- What providers / services were you / are you considering? Why? – i.e. one supplier / two suppliers?
- What, if anything, stopped you from considering some suppliers / other services?
- How easy / hard did you find it to compare suppliers and services? Why?
- Were you looking at switching single services (i.e. the elements not happy with) or only at packaged / bundled services (use respondent language here)? Why? Why not?
 - **PROBE:** on benefits / drawbacks of single, dual and triple bundled services
 - What do they call these? (packages, bundles, deals etc.)
 - Are they perceived as better value / discounted / how?

- More convenient / less infrastructure / fewer bills etc?
- Roughly how long did you spend thinking / looking? Was it hard / easy? Why?
- How far in the process did you get / what, if anything did you do?
- Did you communicate with your current supplier or any other supplier when you were considering switching? What happened? What happened next? **PROBE IN DETAIL**
- Where are you in your thinking now? Why have you not gone ahead with switching?

Section 4c: Action

I'd now like you to think about where you are now in your thinking

- What, if any past experience do you have of switching suppliers in communications / other services? What have these experienced been like?
- If you did decide to look at other suppliers or switch services, what would you do first? What would you do next?
- If you were thinking about switching, who would you contact / contact first (current provider / new provider) Why?
- How easy do you think it would be to switch suppliers? Why? Why not? What makes you think this?
- Who would you need to speak with?
 - First / next?
 - What would those conversations be like?
 - How long do you think the process take? Why?
- What, if anything, puts you off switching? Why?
- What would make you consider switching? What elements of this are most important to you?
- Do you have a fixed idea of what you would want if you did switch, or are you still considering different options?
- Ideally, what service or package of services would you have in your home? Why?
- What, if anything, stops you from getting this?

Section 4d: completion – 20m

n/a

Section 5: Priorities in the process

I'd now like you to think about the process of switching itself; about what actually happens once you start making the arrangements to disconnect or connect services?

- Which of these would be your priorities when switching services....**PAIRED COMPARISONS**
 - The overall time taken to switch
 - Ease of switching services on and off
 - Avoiding gaps in services
 - Having the supplier sorting out the switch for me
 - Sorting out the switch myself
 - Porting numbers
- Are there trade-offs? – for example, would you rather arrange things yourself if that is quicker or would you prefer the supplier sorting it for you even if that was slower?
 - Unpack if there is certainty/trust around switching in allowing a provider to do manage this process?

Show options A (C&R) and B (GPL) (attachment) then probe around additions in A and B

- From any experiences you have in switching communications services:
 - What would you tell other people?
- Are you happy now with the services and providers you have? Why? Why not?
- What, if anything, could work better about the process? What could providers do in order to make things easier for you?
- If you were explaining or giving advice to someone on switching their communication providers what would you tell them? How would switching work ideally, you can think about this from the start of the process to the end? Why?

Section 5: Quad Play – 5m

Some people have bundles of communications services which include a mobile phone contract or SIM as well as pay TV, Broadband and landline?

- Does anyone have this?
 - Why did you decide to do this?
 - Who is the mobile contract (s) for? Why?
 - How long is the contract? Is it the same length as the contract you have for other services? What do you plan to do when it's time to renew?
 - If you wanted to switch everything, what would you do? How would this work?

- Would anyone consider this? Why? Why not?
- What, if anything, would be different about switching to or from a Quad package like this? **PROBE ON** contract lengths
 - What, if any effect would the mobile contract have?

Section 6: OTT services – 5m

- What OTT services do you use?
- How is that distinction made? Does it all come as part of package? Subscription based?
- How would you describe those additional TV services that you subscribe to or receive in addition to your contract with your supplier?
- (Spontaneous) which? – and then show board (Prompted)?
 - *NB: Netflix, Now TV, Amazon Prime (BOARD?)*
- Why did you decide to have these additional channels? Experience of switching OTT? – how does it compare to Triple Play?
- What, for you or your family, is the value in these additional channels?
- What would be the result if you didn't have these channels available?
 - i.e. PROBE on whether these are perceived as 'extra' channels or replacements – e.g. what does having Netflix or Amazon Prime mean on the PAYTV package you subscribe to? Probe: value/price points
- *NB: need to explore how attached they are to these services and whether risk of losing them would put them off switching to another supplier)*

Section 7: Final Thoughts – 2m

- What, if any, final comments do you have?

THANK AND CLOSE

22086 OfCom Switching In-home Depths Discussion Guide – Decided not to Switch - Final

One of the key objectives for the qualitative research is to feed into the development of quantitative questionnaire. As such it is important to gain insights on the following; perceptions of barriers & benefits to switching, the dynamics & trade offs in choosing a bundle of services, consumers experience of specific switching processes (C&R and/or GPL), identifying the nature and magnitude of any consumer harms and terminology used when discussing switching.

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- Reassurances:
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 - Just interested in opinions / reactions
 - Not here to sell you anything
- Explain structure of visit and arrange as convenient

Structure - broadly

- Main decision maker first – 40-50 mins
- Other household – next / during – 10-15 mins each
- Group immersion session – 30 mins

NB: We will need to be flexible about the structure for each visit.

- *Where there is a key decision maker; the person who chooses services and pays for them; we will want to speak to this person first*
- *For a group of friends sharing a flat, it would make more sense to run a group session first and then catch up with the individuals afterwards*
- *Inevitably, the respondents will also have a view on what works for them*

Individual interviews

Section 1: Respondent details *(With each household member)*

- Brief respondent introduction
 - Name
 - Tell me a bit about yourself: e.g. occupation, hobbies etc.
- In a typical day / week how long do you spend using communications services in the home - either watching TV / pay TV, OTT, playing games online, speaking on your landline or mobile (in home), using internet?
- Where / how do they do this? – ‘show and tell’

Main interview with decision maker – 40 mins

Current services

- Brief overview of current subscription of communications services (i.e. broadband / fixed voice / Pay TV / mobile voice/ OTT)
 - What services do you have currently?
 - Who supplies these services? How much do they cost monthly?
 - How long have you had these services? What did you have before this?
- Can you talk me through the decision making process for choosing the services you now have?
 - What were your thought processes / main considerations
 - What did you do first / next?
- Did you look at other services/ other providers? Where did you search for information? Trusted sources? How easy is it obtain information?
- What are your impressions of what else is available versus what you currently have?
- If, for some reason, you decided you wanted to switch communication providers when could you do this?
 - **PROBE:** When does your contract run out? Is it the same date for all of your services or not?
 - What happens when the contract (s) expires? – i.e. do you intend to roll on / do you expect a contact from your provider(s) etc? Any perceptions of ETC charges/ notice periods etc?
 - If contract times / periods are different for LL/BB and Pay TV, when would be the logical time to consider other options? Do contracts ever end at the same time?
 - How does this impact on your decision to switch in future?

Pre-task feedback

We asked you to think about switching communications services, to note down any experiences you have of switching and to find one or two images that expressed something for you about the process

For each image, briefly:

- Briefly explore the meaning / metaphor

Section 4a: Engagement 10m

I'd like you to think about your thought processes from the earliest stage – the point at which you were starting to think that you might want to switch services.

- At what point did you decide to think about switching services?
 - Why? What happened? What was the trigger (s) for this? – e.g. increased need, unhappy with services / customer service / better offers/ increase in price etc.
 - Explore whether impulse was push (poor service / not happy with channels etc.) or pull (better offer (price), new channels etc.)
 - If there was any communication from provider which triggered this – get an understanding of content / purpose of communication etc
 - Who in the household suggested switching? Why? What discussions took place?
- How long was it before you got around to doing something about this? Why?
- Did you do anything at this stage in terms of finding out information on how to switch etc?
- Did you have to wait before you could switch? Why?

Section 4b: Assessment 10m

I'd now like you to think about what happened from the point that you actively started considering your options and looking for information up to the point where you decided what you were going to do.

- Once you had decided to investigate switching, what did you do /do next? Why?
- What kind/type of information were you looking for? Why?
- Where did you go for information? How easy/hard was it to find?
 - Information sources used / what information were you looking for /usefulness / helpfulness / did it explain process you need to take?
- What providers / services did you consider? Why? – i.e. one provider / two providers
- What, if anything, stopped you from considering other providers / other services?
- How easy / hard was it to compare providers and services?
- Did you look at switching single services (i.e. the elements not happy with) or only at packaged / bundled services (use respondent language here)? Why? Why not?

- **PROBE:** on benefits / drawbacks of single, dual and triple bundled services
- What do they call these? (packages, bundles, deals etc.)
- Are they perceived as better value / discounted / how?
- More convenient / less infrastructure / fewer bills etc?
- Roughly how long did you spend doing this? Was it hard / easy? Why?

Section 4c: Action 10m

- What did you think the switching process would be like? What did you think would be involved? Did you think it would be easy /hard? Why?
 - **PROBE** around any perceptions of gaps in services? (Pay TV vs LL/BB)
Would they expect these? What would they do in order to avoid these?
 - **PROBE** around any discussion of infrastructure changes / boxes and router changes / holes in walls etc.
 - **PROBE** if not contacted any providers including current provider, what is their perception around who they would need to contact first / second?
 - What were your expectations around how long it might take?
 - Is the time taken to go from deciding to switch to the switch taking place an important consideration if no gap in service or double paying? What would be considered a reasonable period of time? What length of time would it become unacceptable?
- Did you actively talk with providers? How did you reach a decision as to which provider to talk to about switching services to them? What was the deciding factor? What other reasons were important?
- Did you have a fixed idea of what you wanted, or were you still considering different options?
- Elicit the 'story' of why they decided not to switch? How far did they get?
 - Who did they speak to (current provider / other potential provider (s) / etc?
How (channel)? Why? What was discussed?
- Why did you decide not to switch?
 - What, if anything, was discussed about the implications of switching – i.e. price changes / early termination charges (ETCs) / losing channels?
 - What was discussed around what you'd need to do in order to switch?

Section 4d: completion – 20m

n/a

Section 5: Priorities in the process 10m

I'd now like you to think about the process of switching itself; about what actually happens once you start making the arrangements to disconnect or connect services?

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NB: key thing here it to explore the issue of time vs certainty – would they wait longer to have everything managed for them?

- Unpack if there is certainty/trust around switching in allowing a provider to manage this process?

Show options A (C&R) and B (GPL) (attachment) then probe around additions in A and B

- From your experiences in looking at switching communications services:
 - What would you tell other people?
- What, if anything, could work better about the process? Is there anything that could be done to make things easier for you to switch?
- How do you feel now about the services you have? Why?
- How happy are you with your decision not to switch? Why?
- If you were explaining or giving advice to someone looking at switching their communication providers what would you tell them?
- Have you switched any other services (energy, banking, insurance)? How do you think switching communication providers would compare? How often do you switch?

Shorter interviews with other household members – 10 to 15 mins each

I'd like you to show me one of the communication devices you have in the home (TV, tablet, connected game etc.) you typically spend time on and whilst you do that I'm going to ask you some other questions.

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- Which services / content do you most enjoy? Why?
 - **PROBE:** As to whether this is paid for / free (OTT) content?
- Which are the most useful / essential for you? Why?
- Which services could you not live without? Why?
- Which services could you do without?
 - **PROBE:**
 - i.e. do they need the landline for calls? Do they need subscription TV packages (as much as in the past?) Do they need superfast broadband for what they use?
- What, if anything, would you like to be able to do or have access to that you don't have currently?
 - **PROBE:** Can friends / colleagues do things that they can't / watch things that they can't?
- What, if anything could be better about the communications services you currently have?
- Have you been involved in the decision to look at switching options and then not switch? Can you tell me about this? What stopped your household from switching in the end?

Household Session

Decision making – 15 mins

- How are decisions made in your household around what communications services in the home are needed?
 - Who is involved in the decision?
 - What role does each person play? (Who pays?)
 - What factors are taken into consideration?
 - What are the priorities for the household?
 - How are final decisions taken? What is traded off against what?
- For the provider (s) that you use, what are the key things that made you choose this / these providers?
- **PROBE AROUND:**
 - Cost / value
 - Convenience
 - Content
 - Speed
 - Availability?
- Was their one main thing that led your household to pick this communications bundle over the others? Why?
- How, if at all, could they be more suitable for you? **IF NOT SUITABLE:** what, if anything, stops you from considering other communication providers/ services?
- How do you find out what else is available from other providers?
 - How do you compare other offers with what you have and what else is available? How easy is this?

Content storage

- What, if any content do you have stored that is associated with your current provider? Where is this stored? What would happen if you were to switch? Why?

Bundled Services – 10 mins

- If you could design your own 'optimum solution' for your household what would it look like?
 - Is this currently offered by providers? What stops you from taking these services up?

You recently looked into switching, why did that process start and why did this not happen?

- PROBE as to the extent to which any perceived complexity in researching switching and actual switching / dealing with providers etc. prevents them from doing this?
- (if appropriate) Tell me about the choices you make with regards to using the same provider for two or three services versus using one
- **PROBE:** on benefits / drawbacks of single, dual and triple bundled services. What do they call these? (packages, bundles, deals etc.)

OTT services – 10 mins

- What OTT services do you use?
 - How is that distinction made? Does it all come as part of package? Subscription based? Pay additionally for it?
 - How would you describe those additional TV services? r?
- (Spontaneous) which? – and then show board (Prompted)?
 - *NB: Netflix, Now TV, Amazon Prime (BOARD?)*
- Why did you decide to have these additional channels?

NB: sometimes OTT channels are offered to customers as part of an upgrade deal

- What, for you or your family, is the value in these additional channels?
- What would be the result if you didn't have these channels available?
 - i.e. PROBE on whether these are perceived as 'extra' channels or replacements – e.g. what does having Netflix or Amazon Prime mean on the PAYTV package you subscribe to? Probe: value/price points
 - *Have you switched OTT services? What was it like? Would you consider switching? What do you perceive OTT switching to be like?*
- *NB: need to explore how attached they are to these services and whether risk of losing them would put them off switching to another provider)*
- *Briefly mention interest in Quad bundles –*
- *Do they ever talk about switching communications to those outside of household?*

THANK AND CLOSE.

22086 Ofcom Switching Mini-Groups Discussion Guide – Decided not to Switch - Final

NOTE TO MODERATOR:

One of the key objectives for the qualitative research is to feed into the development of Quantitative Questionnaire. As such it is important to gain insights on the following; perceptions of barriers & benefits to switching, the dynamics & trade offs in choosing a bundle of services, how consumers experience specific switching processes (C&R and/or GPL), assessing consumer harms and terminology used when discussing switching.

Introduction - 5m

- Moderator to introduce themselves/BDRC Continental as independent researcher.
- Provide necessary assurances regarding confidentiality / recording / MRS Code of Conduct
- Explain purpose of research: Understand the reasons why and how consumers chose communication services & packages, including any experience of switching
- Reassurances:
 - No right or wrong answers
 - Just interested in opinions / reactions
 - Not here to sell you anything
- Length of group

Section 1: Respondent background – 5m

- Respondent introductions in pairs (moderator to include self if odd number)
 - Name
 - Household composition
 - Occupation
 - (ice breaker) How they use communications in the house – one that they are prepared to share – i.e. long video calls with mum / watching silly you tube video's etc.

Section 2: Re-cap on pre-task / current services – 10m

For the pre-task, we suggest supplying respondents with a self-complete diagram / list showing communications and devices used within the household including OTT and paid for content:

- I'd like you to each briefly describe your current household communications diagram, tell us a little about who uses and who watches what in your household
- Focus on:
 - Fixed line
 - Fixed broadband (wi-fi)
 - Pay TV
- What's the most important service for your household? What could you not do without? Is this the same service for everyone, or different for individuals within the household?
- What, if any elements are not as good as they might be / could be better? Why? How?
- What, if anything, would you like to be able to do / have access to that you don't have currently? What, if anything would you change from what you have if you were able to? Why?

Section 3: Perceptions on switching - UNPROMPTED – 10m

One of the main reasons we've asked you here this evening is to talk about switching communications services in the home; the reasons people decide to switch or not to switch and also the steps people go through in order to switch .

Before we look at this in more detail, I have a selection of images here, and I'd like you to select a couple of images which in some way express **a thought or feeling you have about your most recent experience of switching.**

NB: We have a large selection of non-literal / projective images which we can use for this. – a collection of projective – non-literal images – Visual Explorer

For each image selected:

- Explore meaning of image and (briefly) ladder up / down as appropriate
- Fully explore any examples – particularly around degree of choice experienced /felt by the consumer

As a group:

- What else comes to mind when we think about ...X (the element of switching raised by the respondent)
 - **CAPTURE ON FLIPCHART - DISCUSS**
- What other experiences do people go through when they switch suppliers for communications services in the home?

I'd like us to talk in more detail about your experiences of switching communications services in the home to another supplier.

NB: RECALL STEPS/STAGES REFERRED TO BY CUSTOMER WHERE APPROPRIATE

Whilst the following sections have been split into distinct steps to fit with Ofcom's view of the process, inevitably consumer perceptions and recall of the switching process will be less 'neat and tidy' and they will likely start talking about the latter stages of switching from the outset.

Section 4a: Engagement – 10m

I'd like you to think about your thought processes from the earliest stage – the point at which you were starting to think that you might want to switch services.

- At what point did you decide to think about switching services?
 - Why? What happened? What was the trigger (s) for this? – e.g. increased need, unhappy with services / customer service / better offers/ increase in price etc.
 - Explore whether impulse was push (poor service / not happy with channels etc.) or pull (better offer (price), new channels etc.)
 - If there was any communication from provider which triggered this – get an understanding of content / purpose of communication etc
 - Who in the household suggested switching? Why? What discussions took place?
- How long was it before you got around to doing something about this? Why?
- Did you do anything at this stage in terms of finding out information on how to switch etc?
- Did you have to wait before you could switch? Why?

Section 4b: Assessment – 10m

I'd now like you to tell us about what, if any, research or information gathering you have done

I'd now like you to think about what happened from the point that you actively started considering your options and looking for information up to the point where you decided what you were going to do.

- Once you had decided to investigate switching, what did you do /do next? Why?

- What kind/type of information were you looking for? Why?
- Where did you go for information? How easy/hard was it to find?
 - Information sources used / what information were you looking for /usefulness / helpfulness / did it explain process you need to take?
- What providers / services did you consider? Why? – i.e. one provider / two providers
- What, if anything, stopped you from considering other providers / other services?
- How easy / hard was it to compare providers and services?
- Did you look at switching single services (i.e. the elements not happy with) or only at packaged / bundled services (use respondent language here)? Why? Why not?
 - **PROBE:** on benefits / drawbacks of single, dual and triple bundled services
 - What do they call these? (packages, bundles, deals etc.)
 - Are they perceived as better value / discounted / how?
 - More convenient / less infrastructure / fewer bills etc?
- Roughly how long did you spend doing this? Was it hard / easy? Why?

Section 4c: Action – 10m

- What did you think the switching process would be like? What did you think would be involved? Did you think it would be easy /hard? Why?
 - **PROBE** around any perceptions of gaps in services? (Pay TV vs LL/BB)
Would they expect these? What would they do in order to avoid these?
 - **PROBE** around any discussion of infrastructure changes / boxes and router changes / holes in walls etc.
 - **PROBE** if not contacted any providers including current provider, what is their perception around who they would need to contact first / second?
 - What were your expectations around how long it might take?
 - Is the time taken to go from deciding to switch to the switch taking place an important consideration if no gap in service or double paying? What would be considered a reasonable period of time? What length of time would it become unacceptable?
- Did you actively talk with providers? How did you reach a decision as to which provider to talk to about switching services to them? What was the deciding factor? What other reasons were important?
- Did you have a fixed idea of what you wanted, or were you still considering different options?
- Elicit the 'story' of why they decided not to switch? How far did they get?
 - Who did they speak to (current provider / other potential provider (s) / etc?
How (channel)? Why? What was discussed?
- Why did you decide not to switch?
 - What, if anything, was discussed about the implications of switching – i.e. price changes / early termination charges (ETCs) / losing channels?

- What was discussed around what you'd need to do in order to switch?
- **IF SPOKE TO PROVIDER:** What, if anything, was discussed about the implications of switching – e.g. any early termination charges / price changes / losing channels or other content / broadband speeds
- Where difficulties are mentioned probe: main v other difficulties what had an impact on them switching/not switching?
-

Section 4d: completion

n/a

Section 5: Priorities in the process 10m

I'd now like you to think about the process of switching itself; about what actually happens once you start making the arrangements to disconnect or connect services?

- When you think about switching broadband and landline and Pay TV, which of these factors are the most important?
- SHOW FEATURES ON CARDS NEXT TO EACH OTHER – I.E. LIKE A FORM OF QUALITATIVE CONJOINT. ENSURE THAT OVERALL TIME IS COMPARED AGAINST HAVING THE PROVIDER SORT OUT AS ONE PAIR
 - The overall time taken to switch
 - Ease of switching
 - Avoiding gaps in services
 - Having the provider sorting out the switch for me
 - Sorting out the switch myself
 - Porting numbers

NB: key thing here it to explore the issue of time vs certainty – would they wait longer to have everything managed for them?

- Unpack if there is certainty/trust around switching in allowing a provider to manage this process?

Show options A (C&R) and B (GPL) (attachment) then probe around additions in A and B

- From your experiences in looking at switching communications services:
 - What would you tell other people?
- What, if anything, could work better about the process? Is there anything that could be done to make things easier for you to switch?
- How do you feel now about the services you have? Why?
- How happy are you with your decision not to switch? Why?

- If you were explaining or giving advice to someone looking at switching their communication providers what would you tell them?
- Have you switched any other services (energy, banking, insurance)? How do you think switching communication providers would compare? How often do you switch?

Section 5: Quad Play – 5m

Some people have bundles of communications services which include a mobile phone contract or SIM as well as pay TV, Broadband and landline?

- Does anyone have this?
 - Why did you decide to do this?
 - How long is the contract? Is it the same length as the contract you have for other services? What do you plan to do when it's time to renew?
 - If you wanted to switch everything, what would you do? How would this work?
- Would anyone consider this? Why? Why not?
- What would you call this package of services?
- What, if anything, would be different about switching to or from a package like this?
PROBE ON contract lengths

Section 6: OTT services – 5m

- What PayTV services do you use? Those as part of package or others you subscribe too?
- How is that distinction made? Does it all come as part of package? subscription based?
- How would you describe those additional TV services that you subscribe to or receive in addition to your contract with your supplier?
- (Spontaneous) which? – and then show board (Prompted)?
 - *NB: Netflix, Now TV, Amazon Prime, BT Sport (BOARD?)*
 - *Do people know the difference between OTT and PayTV? Terminology of OTT – how do they refer to these additional services*
- Why did you decide to have these additional channels?
- *NB: sometimes OTT channels are offered to customers as part of an upgrade deal*
- What, for you or your family, is the value in these additional channels?
- How does it fit into your current package? **How do you make choices about the package you choose?** *Probe Importance of OTT service in relation to overall package? As part of it (free inclusion) in package / as an additional element/ availability on service chosen?*
- What would be the result if you didn't have these channels available?
 - i.e. PROBE on whether these are perceived as 'extra' channels or replacements – e.g. what does having Netflix or Amazon Prime mean on the PAYTV package you subscribe to?
- *NB: need to explore how attached they are to these services and whether risk of losing them would put them off switching to another provider)*

Section 7: Final Thoughts – 5m

or giving advice to someone on switching their communication providers what would you tell them? What would be the ideal switching process? Why? How does it compare with the experience of switching other services e.g utilities/banks etc?

THANK AND CLOSE

22086 Ofcom Switching In-home Depths Discussion Guide - Recent Switchers - Final

One of the key objectives for the qualitative research is to feed into the development of quantitative questionnaire. As such it is important to gain insights on the following; perceptions of barriers & benefits to switching, the dynamics & trade offs in choosing a bundle of services, consumers experience of specific switching processes (C&R and/or GPL), identifying the nature and magnitude of any consumer harms and terminology used when discussing switching.

Introduction

- Moderator to introduce themselves/BDRC Continental as independent researcher.
- Provide necessary assurances regarding confidentiality / MRS Code of Conduct
- Explain purpose of research: Understand the reasons why and how consumers chose communication services & packages, including any perceptions and experience of switching
 - *NB: Focus is NOT on mobile for this research (except where quadplay)*
- Reassurances:
 - No right or wrong answers
 - Just interested in opinions / reactions
 - Not here to sell you anything
- Explain structure of visit and arrange as convenient

Structure - broadly

- Main decision maker first – 40-50 mins
- Other household – next / during – 10-15 mins each
- Group immersion session – 30 mins

NB: We will need to be flexible about the structure for each visit.

- *Where there is a key decision maker; the person who chooses services and pays for them; we will want to speak to this person first*
- *For a group of friends sharing a flat, it would make more sense to run a group session first and then catch up with the individuals afterwards*
- *Inevitably, the respondents will also have a view on what works for them*

Individual interviews

Section 1: Respondent details *(With each household member)*

- Brief respondent introduction
 - Name
 - Tell me a bit about yourself: e.g. occupation, hobbies etc.
- In a typical day / week how long do you spend using communications services in the home - either watching TV / pay TV, OTT, playing games online, speaking on your landline or mobile (in home), using internet?
- Where / how do they do this? – ‘show and tell’

Main interview with decision maker – 50 mins

Current services

- Brief overview of current subscription of communications services (i.e. broadband / fixed voice / Pay TV / mobile voice/ OTT)
 - What services do you have currently?
 - Who supplies these services? How much do they cost monthly?

Pre-task feedback

We asked you to think about switching communications services, to note down any experiences you have of switching and to find one or two images that expressed something for you about the process

For each image, briefly:

- Briefly explore the meaning / metaphor

Section 4a: Engagement 10m

I'd like you to think about your thought processes from the earliest stage – the point at which you were starting to think that you might want to switch services

- At what point did you decide to think about switching services?
 - Why? What happened? What was the trigger (s) for this? – e.g. increased need, unhappy with services / customer service / better offers/ increase in price etc.
 - Explore whether impulse was push (poor service / not happy with channels etc.) or pull (better offer (price), new channels etc.)
 - Who in the household suggested switching? Why? What discussions took place?
 - If there was any communication from provider which triggered this – get an understanding of content / purpose of communication etc

- Who in the household suggested switching? Why? What discussions took place?
- How long was it before you got around to doing something about this? Why?
- Did you do anything at this stage in terms of finding out information on how to switch etc?
- Did you have to wait before you could switch? Why?
 - **IF NOT MENTIONED PROBE ON:** contracts / being out of contract. Different end dates to contracts? How did they find out about this? Check paperwork? Talk to previous provider? ETC (end of contract charges) Noticed periods?

Section 4b: Assessment 10m

I'd now like you to think about what happened from the point that you actively started considering your options and looking for information up to the point where you decided what you were going to do.

- Once you had decided to investigate switching, what did you do /do next? Why?
- What kind/type of information were you looking for? Why?
- Where did you go for information? How easy/hard was it to find?
- Information sources used / what information were you looking for /usefulness / helpfulness / did it explain process you need to take? Trusted sources? What providers / services did you consider? Why? – i.e. one provider / two providers
- What, if anything, stopped you from considering other providers/ other services?
- How easy / hard was it to compare providers and services?
- Did you look at switching single services (i.e. the elements not happy with) or only at packaged / bundled services (use respondent language here)? Why? Why not?
 - **PROBE:** on benefits / drawbacks of single, dual and triple bundled services
 - What do they call these? (packages, bundles, deals etc.)
 - Are they perceived as better value / discounted / how?
 - More convenient / less infrastructure / fewer bills etc?
- Roughly how long did you spend doing this? Was it hard / easy? Why?

Section 4c: Action 10m

I'd now like you to think about what happened once you'd decided you were going to switch.

- Before going ahead, what did you think the switching process would be like? What did you think would be involved? Did you think it would be easy /hard? Why?

- How did you reach a decision as to which provider (s) to actively talk to about switching services to them? What was the deciding factor? What other reasons were important?
- Did you have a fixed idea of what you wanted, or were you still considering different options?
 - Explore whether impulse was push (poor service / not happy with channels etc.) or pull (better offer (price), new channels etc.)
 - How, if at all, did your decisions change during the process of arranging to switch? Why? What happened?
- Who did you contact / contact first (previous provider / new provider) Why? What happened next?
NB: need to understand why contacted previous provider – because they wanted to / had to?
- Elicit the ‘story’ of each switching conversation / contact
 - Who did they speak to? How (channel) Why? What was discussed?
- What did you discuss with your previous provider? – i.e. what attempts were made at negotiation (on either side) / retention – save? If save – how was this experienced? Why did you decide not to go with offer?
 - What, if anything, was discussed about the implications of switching – i.e. price changes / losing channels
 - What was discussed around what you’d need to do in order to switch

Section 4d: completion – 10m

I’d now like you to think about the actual process itself. What actually happened once you started making the arrangements to change providers?

- What, if anything were you asked to do by your current provider?
- What, if anything were you asked to do by your previous provider?
- When were you asked to do this? What were you told was the reason for this?
- What was your priority at this stage? Why? – i.e. what was needed first?
- Elicit the story of the switch? What happened? What happened next?
 - What was their role in the process?
 - Who did they contact? – i.e. did they call previous provider to cancel / whether required to or not? Why? Drivers behind this i.e lack of trust in process etc
 - What, if any, appointments were made? Who arranged these? How convenient were they? What happened?
 - NB: Important to discover if these were with an Open-reach engineer (Broadband / landline) or a provider engineer – or whether new line / dish was needed. Did they need someone to set things up for them?

- What, if any, difficulties did you experience during this process?
 - **PROBE ON:**
 - Any loss of service / gaps in service? How long?
 - Any perceptions of double paying? How much by? Do they know detail?

IMPORTANT MODERATOR NOTE: Understanding of consumer choice i.e did a consumer choose to double pay rather than lose service?

Did a consumer have a gap in service due to not being able to be around on some dates offered for installation?

- NB: Need to explore whether any loss of service was wanted (i.e. on holiday) or unwanted – installation delays / accidental error / contract lengths etc.
 - Need to explore whether double paying was caused by:
 - The previous provider overlapping
 - Appointment date issues – not being able to be around
 - The customer need to ensure continuous service – even if this meant double paying
- What, if anything, did you find surprising or unexpected about this process? Why?

Section 5: Priorities in the process 10m

I'd now like you to think about the actual process itself. What actually happened once you started making the arrangements to disconnect or connect services?

- When you think about switching broadband and landline and Pay TV, which of these factors are the most important?
- SHOW FEATURES ON CARDS NEXT TO EACH OTHER – I.E. LIKE A FORM OF QUALITATIVE CONJOINT. ENSURE THAT OVERALL TIME IS COMPARED AGAINST HAVING THE PROVIDER SORT OUT AS ONE PAIR
 - The overall time taken to switch
 - Ease of switching
 - Avoiding gaps in services
 - Having the provider sorting out the switch for me
 - Sorting out the switch myself
 - Porting numbers

NB: key thing here it to explore the issue of time vs certainty – would they wait longer to have everything managed for them?

- Unpack if there is certainty/trust around switching in allowing a provider to manage this process?

Show options A (C&R) and B (GPL) (attachment) then probe around additions in A and B

- From your experiences in switching communications services:
 - What would you tell other people?
- What, if anything, could work better about the process? What could providers do in order to make things easier for you?
- In the end, did you feel that you got the package you wanted / an ideal package? Why? Why not? What compromises, if any, did you make?
- If you were explaining or giving advice to someone on switching their communication providers what would you tell them? How would switching work ideally, you can think about this from the start of the process to the end? Why?

Shorter interviews with other household members – 10 mins each

I'd like you to show me one of the communication devices you have in the home (TV, tablet, connected game etc.) you typically spend time on and whilst you do that I'm going to ask you some other questions.

- Which communications services do you most enjoy? Why?
- Since you've had the package of services you have now, how has your behaviour changed? What do you do now that you didn't before?
- Which services / content do you most enjoy? Why?
 - **PROBE:** As to whether this is paid for / free (OTT) content?
- Which are the most useful / essential for you? Why?
- Which services could you not live without? Why?
- Which services could you do without?
 - **PROBE:**
 - Importance of landline, TV subscription, OTT and broadband speeds
- What, if anything, would you like to be able to do or have access to that you don't have currently?
 - **PROBE:** Can friends / colleagues do things that they can't / watch things that they can't?
- What, if anything could be better about the communications services you currently have?
- Have you been involved in the decision to look at switching options and then not switch? Can you tell me about this? What stopped your household from switching in the end?

Household Session

Decision making – 15 mins

- How are decisions made in your household around what communications services in the home are needed?
 - Who is involved in the decision?
 - What role does each person play? (Who pays?)
 - What factors are taken into consideration?
 - What are the priorities for the household?
 - How are final decisions taken? What is traded off against what?
- For the provider (s) that you use, what are the key things that made you choose this / these providers?
- **PROBE AROUND:**
 - Cost / value
 - Convenience
 - Content
 - Speed of broadband
 - Availability?
- Was their one main thing that led your household to pick this communications bundle over the others? Why?
- How, if at all, could they be more suitable for you? **IF NOT SUITABLE:** what, if anything, stops you from considering other communication providers/ services?
- How do you find out what else is available from other providers?
 - How do you compare other offers with what you have and what else is available? How easy was this?

Content storage

- What, if any content do you have stored that is associated with your current provider? Where is this stored? What would happen if you were to switch? Why?

Bundled Services – 10 mins

- If you could design your own 'optimum solution' for your household what would it look like?
 - Is this currently offered by providers? What stops you from taking these services up?

You recently looked into switching, why did that process start and why did this not happen?

- PROBE as to the extent to which any perceived complexity in researching switching and actual switching / dealing with providers etc. prevents them from doing this?
- (if appropriate) Tell me about the choices you make with regards to using the same provider for two or three services versus using one
- **PROBE:** on benefits / drawbacks of single, dual and triple bundled services. What do they call these? (packages, bundles, deals etc.)

OTT services – 10 mins

- What OTT services do you use?
 - How is that distinction made? Does it all come as part of package? Subscription based? Pay additionally for it?
 - How would you describe those additional TV services? r?
- (Spontaneous) which? – and then show board (Prompted)?
 - *NB: Netflix, Now TV, Amazon Prime (BOARD?)*
- Why did you decide to have these additional channels?
- What, for you or your family, is the value in these additional channels?
- *NB: sometimes OTT channels are offered to customers as part of an upgrade deal*
- What would be the result if you didn't have these channels available?
 - i.e. PROBE on whether these are perceived as 'extra' channels or replacements – e.g. what does having Netflix or Amazon Prime mean on the PAYTV package you subscribe to? Probe: value/price points
 - *Have you switched OTT services? What was it like? Would you consider switching? What do you perceive OTT switching to be like?*
- *NB: need to explore how attached they are to these services and whether risk of losing them would put them off switching to another provider)*
- *Briefly mention interest in Quad bundles*
- *Do they ever talk about switching communications to those outside of household?*

THANK AND CLOSE.

22086 Ofcom Switching Mini-Groups Discussion Guide – Recent Switchers - Final

NOTE TO MODERATOR:

One of the key objectives for the qualitative research is to feed into the development of quantitative questionnaire. As such it is important to gain insights on the following; perceptions of barriers & benefits to switching, the dynamics & trade offs in choosing a bundle of services, consumers experience of specific switching processes (C&R and/or GPL), identifying the nature and magnitude of any consumer harms and terminology used when discussing switching.

Introduction - 5m

- Moderator to introduce themselves/BDRC Continental as independent researcher.
- Provide necessary assurances regarding confidentiality / recording / MRS Code of Conduct
- Explain purpose of research: Understand the reasons why and how consumers chose communication services & packages, including any perceptions and experience of switching
- Reassurances:
 - No right or wrong answers
 - Just interested in opinions / reactions
 - Not here to sell you anything
- Length of group

Section 1: Respondent background – 5m

- Respondent introductions in pairs (moderator to include self if odd number)
 - Name
 - Household composition
 - Occupation
 - (Ice Breaker) How they use communications in the house – one that they are prepared to share – i.e. long video calls with mum / watching silly you tube video's etc.

Section 2: Re-cap on pre-task / current services – 10m

For the pre-task, we have supplied respondents with a self-complete diagram / list showing communications and devices used within the household including OTT and paid for content:

- I'd like you to each briefly describe your current household communications diagram, tell us a little about who uses and who watches what in your household
- Focus on:
 - Fixed line
 - Fixed broadband
 - Pay TV
- What's the most important service for your household? What could you not do without? Is this the same service for everyone, or different for individuals within the household?

- What, if any elements are not as good as they might be / could be better? Why? How?
- What, if anything, would you like to be able to do / have access to that you don't have currently? What, if anything would you change from what you have if you were able to? Why?

Section 3: Perceptions on switching - UNPROMPTED – 5-10m

One of the main reasons we've asked you here this evening is to talk about switching communications services in the home; the reasons people decide to switch or not to switch and also the steps people go through in order to switch .

Before we look at this in more detail, I have a selection of images here, and I'd like you to select a couple of images which in some way express **a thought or feeling you have about your most recent experience of the process of switching.**

NB: We have a large selection of non-literal / projective images which we can use for this. – a collection of projective – non-literal images – Visual Explorer

For each image selected:

- Explore meaning of image and (briefly) ladder up / down as appropriate
- Fully explore any examples – particularly around degree of choice experienced /felt by the consumer

As a group:

- What else comes to mind when we think about ...X (the element of switching raised by the respondent)
 - **CAPTURE ON FLIPCHART - DISCUSS**
- How does it compare with the experience of switching other services e.g energy/banks/insurance etc?

I'd like us to talk in more detail about your experiences of switching communications services in the home to another supplier.

Section 4a: Engagement 10m

I'd like you to think about your thought processes from the earliest stage – the point at which you were starting to think that you might want to switch services

- At what point did you decide to think about switching services?
 - Why? What happened? What was the trigger (s) for this? – e.g. increased need, unhappy with services / customer service / better offers/ increase in price etc.

- Who in the household suggested switching? Why? What discussions took place?
- How long was it before you got around to doing something about this? Why?
- Did you do anything at this stage in terms of finding out information on how to switch etc?
- Did you have to wait before you could switch? Why?
 - **IF NOT MENTIONED PROBE ON:** contracts / being out of contract. Different end dates to contracts? How did they find out about this? Check paperwork? Talk to previous supplier?

Section 4b: Assessment 10m

I'd now like you to think about what happened from the point that you actively started considering your options and looking for information up to the point where you decided what you were going to do.

- Once you had decided to investigate switching, what did you do /do next? Why?
- What kind/type of information were you looking for? Why?
- Where did you go for information? How easy/hard was it to find?
 - Information sources used / what information were you looking for /usefulness / helpfulness / did it explain process you need to take
- What providers / services did you consider? Why? – i.e. one supplier / two suppliers
- What, if anything, stopped you from considering other suppliers / other services?
- How easy / hard was it to compare suppliers and services?
- Did you look at switching single services (i.e. the elements not happy with) or only at packaged / bundled services (use respondent language here)? Why? Why not?
 - **PROBE:** on benefits / drawbacks of single, dual and triple bundled services
 - What do they call these? (packages, bundles, deals etc.)
 - Are they perceived as better value / discounted / how?
 - More convenient / less infrastructure / fewer bills etc?
- Roughly how long did you spend doing this? Was it hard / easy? Why?

Section 4c: Action 10m

I'd now like you to think about what happened once you'd decided you were going to switch.

- Before going ahead, what did you think the switching process would be like? What did you think would be involved? Did you think it would be easy /hard? Why?
 - What were your expectations around how long it might take?
 - Is the time taken to go from deciding to switch to the switch taking place an important consideration if no gap in service or double

paying? What would be considered a reasonable period of time? What length of time would it become unacceptable?

- How did you reach a decision as to which supplier (s) to actively talk to about switching services to them? What was the deciding factor? What other reasons were important?
- Did you have a fixed idea of what you wanted, or were you still considering different options?
 - How, if at all, did your decisions change during the process of arranging to switch? Why? What happened?
- Who did you contact / contact first (previous supplier / new supplier) Why? What happened next?
NB: need to understand why contacted previous supplier – because they wanted to / had to?
- Elicit the ‘story’ of each switching conversation / contact
 - Who did they speak to? How (channel) Why? What was discussed?
- What did you discuss with your previous provider? – i.e. what attempts were made at negotiation (on either side) / retention – save? If save – how was this experienced? Why did you decide not to go with offer?
 - What, if anything, was discussed about the implications of switching – i.e. price changes / losing channels
 - What was discussed around what you’d need to do in order to switch
- What, if anything, was discussed about the implications of switching – e.g. any early termination charges / price changes / losing channels or other content / broadband speeds
- Where difficulties are mentioned probe: main v other difficulties what had an impact on them switching/not switching?

Section 4d: completion – 20m

I’d now like you to think about the actual process itself. What actually happened once you started making the arrangements to change providers?

- What, if anything were you asked to do by your current supplier?
- What, if anything were you asked to do by your previous supplier?
- When were you asked to do this? What were you told was the reason for this?
- What was your priority at this stage? Why? – i.e. what was NEEDED first?
- Elicit the story of the switch? What happened? What happened next?
 - What was their role in the process?
 - Who did they contact? – i.e. did they call previous supplier to cancel / whether required to or not? Why? Drivers behind this i.e lack of trust in process etc

- What, if any, appointments were made? Who arranged these? How convenient were they? What happened?
- NB: Important to discover if these were with an Open-reach engineer (Broadband / landline) or a supplier engineer
- What, if any, difficulties did you experience during this process?
 - **PROBE ON:**
 - Any loss of service / gap in service? How long?
 - Any perceptions of double paying? How much by? Do they know detail?

IMPORTANT MODERATOR NOTE: Understanding of consumer choice i.e did a consumer choose to double pay rather than lose service?

Did a consumer have a gap in service due to not being able to be around on some dates offered for installation?

- NB: Need to explore whether any loss of service was wanted (i.e. on holiday) or unwanted – installation delays / accidental error / contract lengths etc.
 - Need to explore whether double paying was caused by:
 - The previous supplier overlapping
 - Appointment date issues – not being able to be around
 - The customer need to ensure continuous service – even if this meant double paying
- What, if anything, did you find surprising or unexpected about this process? Why?

Section 5: Priorities in the process 10m

- SHOW FEATURES ON CARDS NEXT TO EACH OTHER – I.E. LIKE A FORM OF QUALITATIVE CONJOINT. ENSURE THAT OVERALL TIME IS COMPARED AGAINST HAVING THE PROVIDER SORT OUT AS ONE PAIR
 - The overall time taken to switch
 - Ease of switching
 - Avoiding gaps in services
 - Having the provider sorting out the switch for me
 - Sorting out the switch myself
 - Porting numbers

NB: key thing here it to explore the issue of time vs certainty – would they wait longer to have everything managed for them?

- Unpack if there is certainty/trust around switching in allowing a provider to manage this process?

Show options A (C&R) and B (GPL) (attachment) then probe around additions in A and B

- From your experiences in looking at switching communications services:
 - What would you tell other people?
- What, if anything, could work better about the process? Is there anything that could be done to make things easier for you to switch?
- How do you feel now about the services you have? Why?
- How happy are you with your decision to switch? Why?
- If you were explaining or giving advice to someone looking at switching their communication providers what would you tell them?
- Have you switched any other services (energy, banking, insurance)? How do you think switching communication providers would compare? How often do you switch?

Section 5: Quad Play – 5m

Some people have bundles of communications services which include a mobile phone contract or SIM as well as pay TV, Broadband and landline?

- Does anyone have this?
 - Why did you decide to do this?
 - Who is the mobile contract (s) for? Why?
 - How long is the contract? Is it the same length as the contract you have for other services? What do you plan to do when it's time to renew?
 - If you wanted to switch everything, what would you do? How would this work?
- Would anyone consider this? Why? Why not?

- What, if anything, would be different about switching to or from a Quad package like this? **PROBE ON** contract lengths
 - What, if any effect would the mobile contract have?

Section 6: OTT services – 5m

- What OTT services do you use?
- How is that distinction made? Does it all come as part of package? Subscription based?
- How would you describe those additional TV services that you subscribe to or receive in addition to your contract with your supplier?
- (Spontaneous) which? – and then show board (Prompted)?
 - *NB: Netflix, Now TV, Amazon Prime (BOARD?)*
- Why did you decide to have these additional channels? Experience of switching OTT? – how does it compare to Triple Play?
- *NB: sometimes OTT channels are offered to customers as part of an upgrade deal*
- What, for you or your family, is the value in these additional channels?
- How does it fit into your current package? **How do you make choices about the package you choose?** *Probe Importance of OTT service in relation to overall package? As part of it (free inclusion) in package / as an additional element/ availability on service chosen?*
- What would be the result if you didn't have these channels available?
 - i.e. PROBE on whether these are perceived as 'extra' channels or replacements – e.g. what does having Netflix or Amazon Prime mean on the PAYTV package you subscribe to?
- *NB: need to explore how attached they are to these services and whether risk of losing them would put them off switching to another provider)*

Section 7: Final Thoughts – 2m

- What, if any, final comments do you have?

THANK AND CLOSE