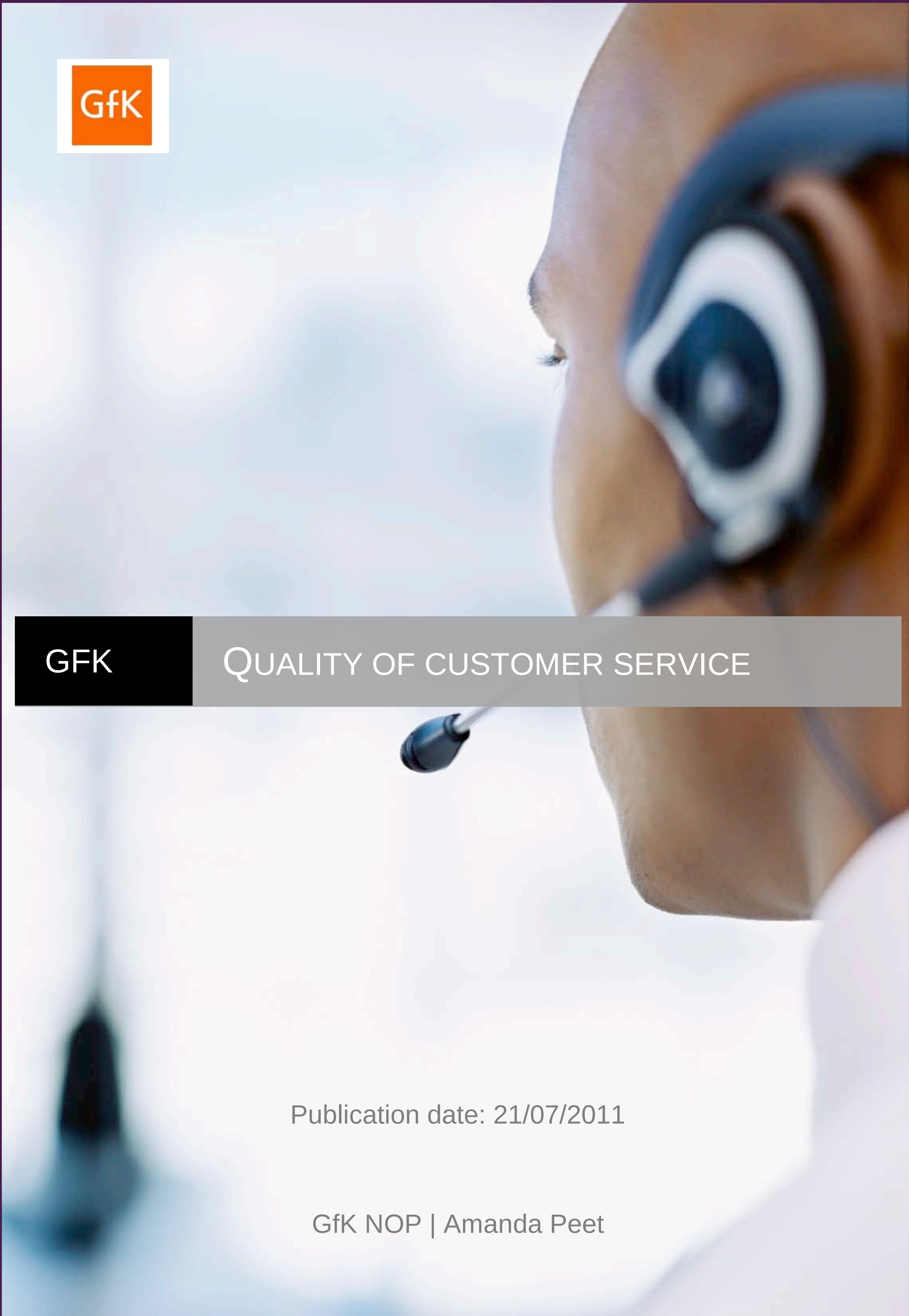


GFK

QUALITY OF CUSTOMER SERVICE

Publication date: 21/07/2011

GfK NOP | Amanda Peet

Contents:

Executive Summary of Findings

Background

- Ofcom (Office of Communications) is the regulator for the UK communications industries, with responsibilities across television, radio, telecommunications and wireless communications services.

- In October 2009, Ofcom commissioned a study to understand the quality of service offered to customers of broadband, mobile, fixed line and pay TV providers. This involved research to understand satisfaction with the quality of service that customers receive from their providers. The results of this research were published in the July 2010 Quality of Service document [see http://stakeholders.ofcom.org.uk/consultations/topcomm/qos-report/]

- In order to track supplier performance and measure any change in performance, GfK was commissioned to conduct a second wave of the research in February 2011. The results are shared in this report, and reflect consumers' views based on their most recent contact with their provider in the last three months (i.e. approximately mid November 2010 to mid February 2011).

Findings

Overall satisfaction with customer service

- UK providers of landline, broadband, mobile and pay TV services continue to provide a satisfactory contact experience in the majority of cases. However, 1 in 5 in each of the fixed and broadband markets, and one in ten in each of the mobile and pay TV markets were dissatisfied with the quality of customer service. Around two thirds of consumers would welcome impartial service rating advice on providers; this rises to around three quarters amongst dissatisfied customers.

- Satisfaction with customer service remains lower in the broadband (57%) and landline (58%) sectors - compared with mobile (69%) and pay TV (66%) - and dissatisfaction is increasing. This would seem to be related to the higher proportion of complaints in the landline and broadband sectors, which typically result in higher levels of dissatisfaction.

- Key provider differences in each sector are:
  - Landline: Sky achieves the highest levels of satisfaction, while TalkTalk is rated below average. Satisfaction with Sky and BT has improved since 2009.
  - Broadband: Coming from behind the other providers in 2009, Orange now achieves the highest customer satisfaction level, while overall satisfaction with TalkTalk is below the market average.
  - Mobile: Improvement for T-Mobile and Orange since 2009, although no one provider dominates.
  - Pay TV: Improvement in Sky satisfaction and adviser ratings, and increasing dissatisfaction with customer service and declining loyalty for Virgin.

- Encouragingly, ratings of various aspects of providers' customer service have generally strengthened since 2009, with the exceptions of Virgin mobile and TalkTalk landline.

Impact on loyalty:

- Delivery on customer service appears to have a direct impact on customer loyalty, with improved customer service having notably increased loyalty for Sky in the landline sector and Orange in the broadband sector. Similarly, weaker performances by TalkTalk and Virgin mobile have resulted in customers claiming to be less likely to stay with these providers.

Contact profiles (number of enquiries and/ or complaints):

- There are relatively fewer contacts to landline providers, compared with other sectors. Contacts in the broadband sector have increased relative to 2009, and decreased in the pay TV sector.

- There is some variation in the overall profile of contacts by sector, with a greater proportion of billing queries in the landline sector and more faults enquiries in the broadband sector. ‘General queries’ are more dominant in the mobile and pay TV sectors.

Issue resolution:

- Most respondents said that issues raised were subsequently resolved - although in many cases this required more than one contact. However, faults & repairs in the broadband and mobile sectors, and billing queries in the landline and broadband sectors, are less fully resolved.

Objectives and Methodology

Research Aim

To quantify levels of satisfaction with customer service experience among the leading communications providers in the UK, to understand whether performance varied depending on the type of issue being dealt with, and to evaluate changes over time by market and provider.

Methodology

The study was divided into two stages, using the same methodologies as in 2009, as follows:

Stage 1:

- 3,000 interviews were undertaken on GfK's weekly nationally representative telephone omnibus to establish a robust profile of the issues (Billing/ Fault/ General) consumers raise with their comms providers.

- This profile was used to weight the online survey data to the profile of contacts for each provider (within service). It was considered necessary to conduct this weighting again in 2011 as the market may have changed, particularly the weighting of events by provider within sector.

- In general, in terms of the profile of contacts the 2011 results were broadly comparable to those seen in 2009, which gives us confidence that the sample is broadly representative of the types of consumers and contacts being made to each supplier. The results of the 2009 research can be seen at: http://stakeholders.ofcom.org.uk/consultations/topcomm/qos-report/

Stage 2:

- An online panel survey was completed amongst consumers who had contacted their service provider(s) in the last three months. Between 1,300 and 2,000 customer service events were identified within each of the four service areas: landline, mobile, broadband and pay TV.

- These events were profiled, and provider performance rated, for relevant aspects of individual customer service experiences.

- Although the methodology for this second wave was identical to that of the first wave, there were minor changes to the questionnaire, as follows:
    - Tiscali was combined with TalkTalk as a broadband provider (the use of Tiscali as a stand-alone brand ceased in January 2010).
    - Tiscali and Talk Talk data for 2009 was netted for comparative purposes.
    - The list of customer service attributes for rating was reduced from 20 to 16, following regression analysis to determine which statements were most important in driving customer satisfaction.
    - A question was added about whether the contact was a complaint.

- For reporting purposes, differences over time (October 2009 versus February 2011) and against the total market ('overall' i.e. the average of all the results in the chart combined) are noted in the report only when they are significantly different. Differences have been reported at the 99% confidence level, meaning that if you asked 100 people in the population, 99 of them would give a similar response to the finding reported.

- Where a 2011 result is significantly different to the average for the market or sector, the difference is indicated with a green circle (result significantly higher) or a red box (result significantly lower). Significant differences over time are indicated by a green up arrow (significant increase) or a red down arrow (significant decrease).

- Please note, when calculating significance difference between percentages, sample sizes are taken into account, and therefore in some charts where providers have similar scores it is possible that one provider score could be significantly different to the overall score, while the other is not.

Overview of all sectors

This section compares the different sectors in terms of incidence, method of contact, issue type, resolution levels, satisfaction with service, as well as interest in service rating information about different providers.

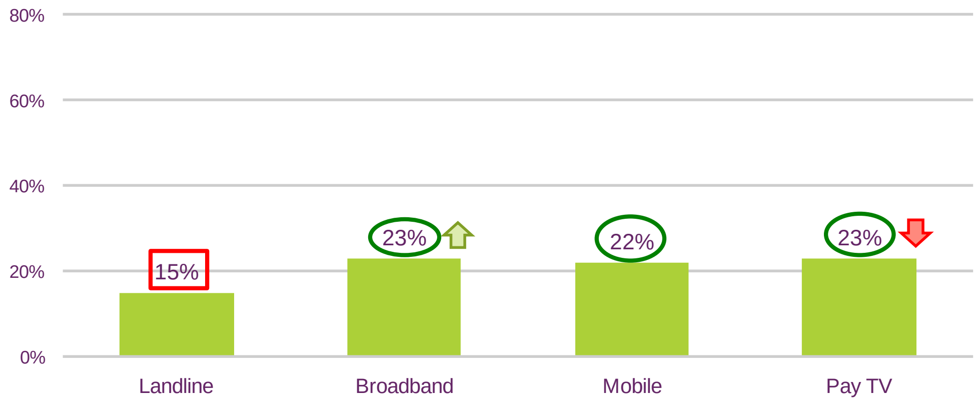
Recent contact with provider

Figure 1.1 (below) shows the proportion of customers who had contacted their service provider in the previous three months. These percentages are based on data from the GfK omnibus survey.

Since 2009, the proportion of customers contacting their broadband provider has increased (from 17%), and contact to pay TV providers has decreased (from 26%).

The chart shows that the lowest incidence of contact was amongst landline customers - significantly lower than the total market.

Figure 1.1 Proportion of customers who had contacted provider in last three months



Q6: Thinking of [PROVIDER] and the services you buy from them, have you contacted them in the last 3 months by phone/ email…?

Base: All UK households using providers: Landline 2,714, Broadband 2,087, Mobile 2,324, Pay TV 1,555.

/ indicates significantly higher/ lower than overall (99% test).

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: GfK Omnibus survey

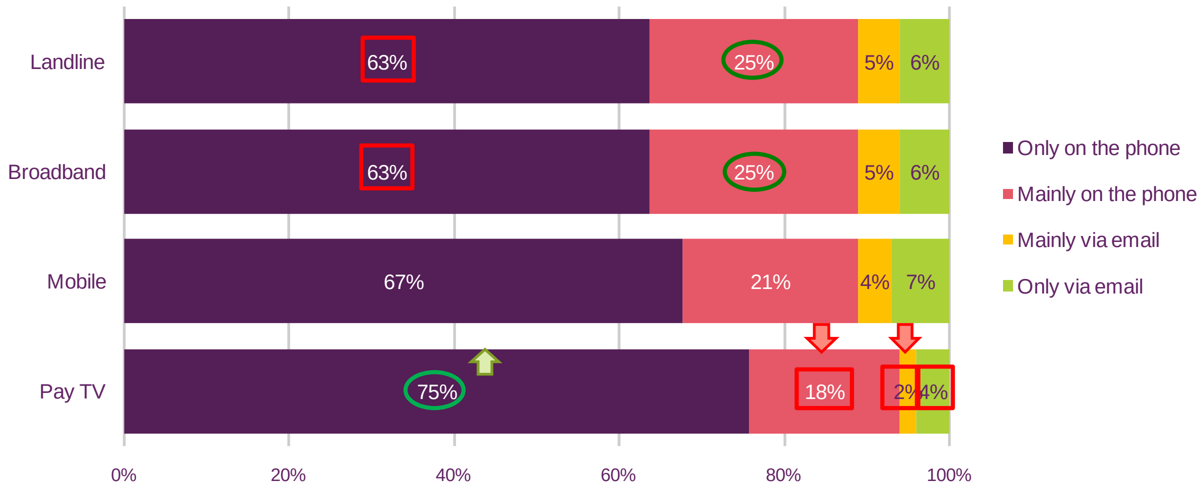
Type of contact with provider

Figure 1.2 (below) shows the way in which customers contacted their service providers.

Pay TV customers were the only customers to have changed their method of contact since 2009, being significantly more likely to have made only telephone contact (an increase from 69% in 2009), and less likely to be making contact via email (down to net of 6% versus 9% in 2009).

While the majority of customers in all sectors made contact solely or mainly by telephone, pay TV customers were more likely, and landline and broadband customers were less likely, to contact only by phone, compared with the market average.

Figure 1.2: Type of contact made most recently



Q2: In dealing with [PROVIDER] about this, did you contact them…?

Base: All UK households contacting provider: Landline 1,259, Broadband 1,781, Mobile 1,995, Pay TV 1,476.

/ indicates significantly higher/ lower than overall (99% test).

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Reason for recent contact with provider

Figure 1.3 (below) shows the type of issue about which customers were contacting their service providers.

Contact profiles were categorised under billing, faults and general. ‘Faults’ covered fault and repair issues whilst ‘general’ covered all other enquiries not related to billing, faults or repairs. The three groups captured all the issues being dealt with by providers whilst helping to understand how the provider’s customer service performance varied depending on the type of issue being dealt with.

Overall, the type of contact by sector is similar to 2009.

Landline customers were significantly more likely than average to have called about billing issues, while broadband customers were more likely to have called about faults. ‘General’ issues were more common than average - and faults less common - in the mobile sector. Pay TV and broadband customers were less likely than average to call about billing issues.

NB: These issues are classified on the basis of what consumers indicated when questioned and therefore subject to interpretation. They may not exactly reflect the actual calls received by the respective providers over the specified period.

Figure 1.3: Type of contact issue made most recently

Q3: Thinking of the most recent issue you had to contact [PROVIDER] about, which of these categories did the issue fall into?

Base: All UK households contacting provider: Landline 394, Broadband 480, Mobile 516, Pay TV 358.

 indicates significantly higher/ lower than overall (99% test).

 indicates significant increase/ decrease versus previous wave (99% test).

Source: GfK Omnibus survey

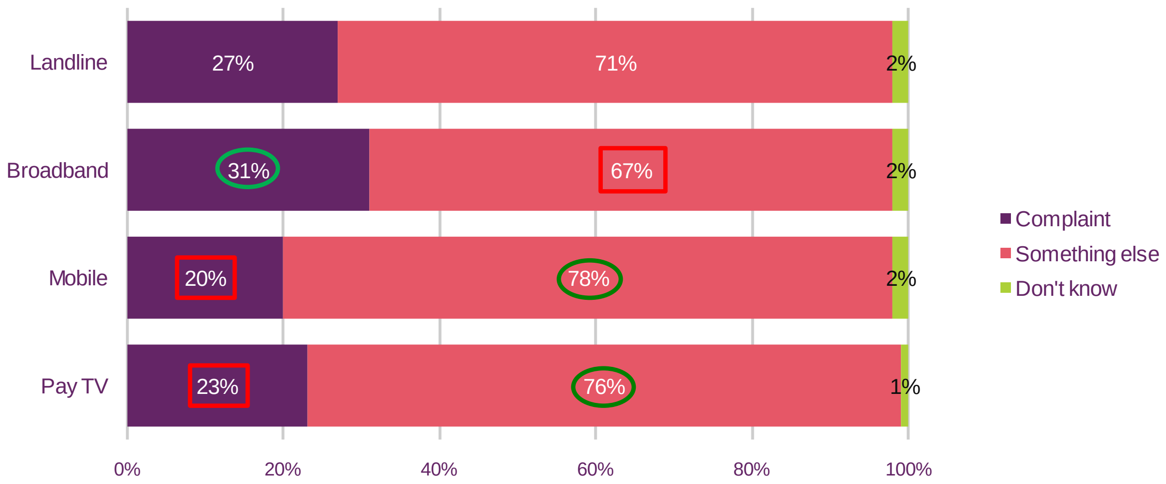
Proportion of complaints

Figure 1.4 (below) shows the proportion of recent contacts to providers that were considered by customers to be complaints.

At least a fifth of contacts in each sector were complaints. The proportion of complaints in the broadband sector was higher than average, whilst mobile and pay TV customers were less likely than average to say that their contact was a complaint.

NB: This question was not asked in 2009.

Figure 1.4: Whether recent contact was regarding a complaint



Q5a: And in your opinion, was the reason for this contact with [PROVIDER] a complaint, or something else?

Base: All UK households contacting provider: Landline 1,259, Broadband 1,781, Mobile 1,995, Pay TV 1,476.

/ indicates significantly higher/ lower than overall (99% test).

Source: Online survey

Degree of resolution of issue by provider

Figure 1.5 (below) shows, by issue type, whether the issue that customers were contacting their service provider about had been resolved.

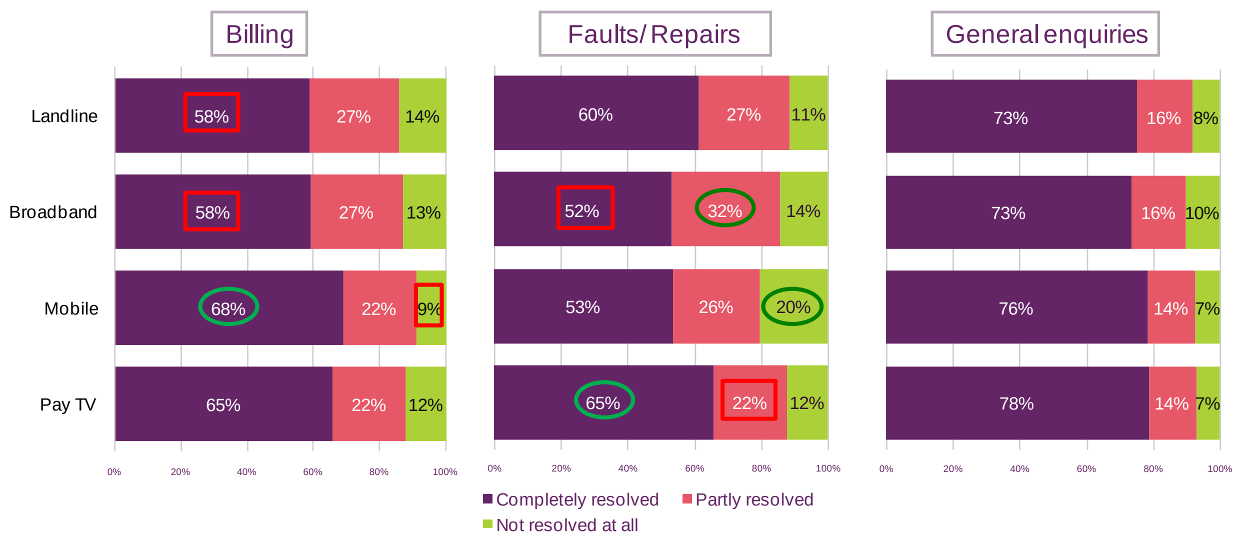
Overall, there were no changes in levels of call resolution since 2009.

The majority of issues in all sectors had been completely resolved, although general enquiries were more likely to have been completely resolved than billing or faults issues.

Amongst those with billing issues, mobile customers were more likely than average, and landline and broadband customers less likely, to have had their issue completely resolved.

For faults issues, broadband customers were less likely than average - and pay TV customers more likely - to have had full resolution, while mobile customers were more likely not to have had their faults issues resolved at all.

Figure 1.5: Whether issue has been 'resolved'



Q5: In your opinion, was [PROVIDER] able to successfully resolve your issue [Billing/Fault/General]?

Base: All UK households contacting provider: Landline 530/313/416, Broadband 562/648/571, Mobile 781/378/836, Pay TV 472/459/545.

/ indicates significantly higher/ lower than overall (99% test).

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

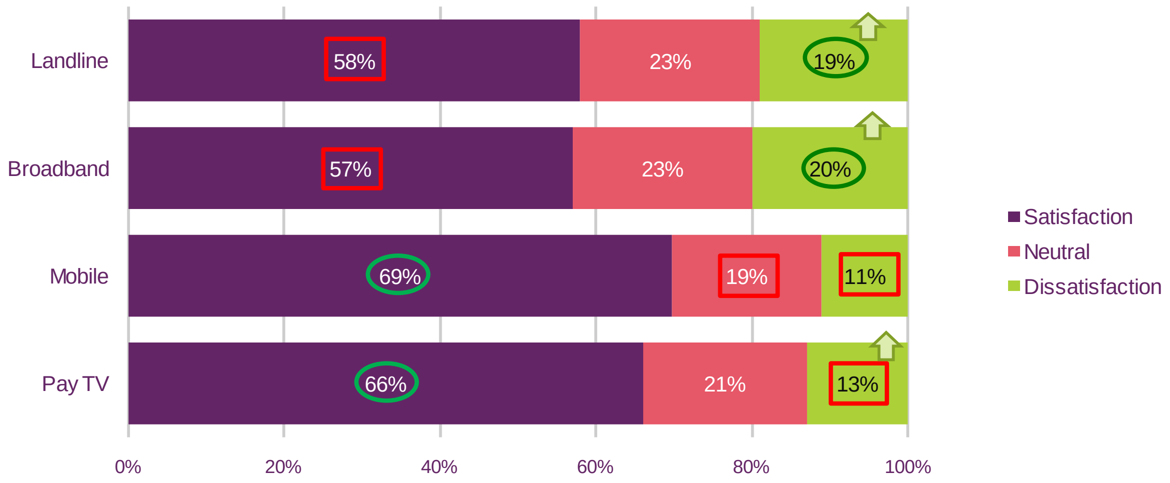
Satisfaction with provider's customer service

Figure 1.6 (below) shows, for each sector, how satisfied customers were with the customer service provided by their service provider during their most recent contact. Satisfaction was rated on a scale from 1 to 10, with a 1 being completely dissatisfied and a 10 being completely satisfied. Ratings are grouped as follows: 7-10 satisfied, 4-6 neutral, 1-3 dissatisfied.

Overall, dissatisfaction has increased since October 2009 in the landline, broadband and pay TV sectors (from 15%,16% and 9% respectively).

In each sector over half of customers were satisfied with the customer service they had received. However, mobile and pay TV customers were significantly more likely than average - and landline and broadband customers less likely - to be satisfied.

Figure 1.6: Satisfaction with customer service by sector



Q3: Overall, how satisfied are you with the service you received from [PROVIDER] customer services on this occasion?

Base: All UK households contacting provider: Landline 1,259, Broadband 1,781, Mobile 1,995, Pay TV 1,476.

/ indicates significantly higher/ lower than overall (99% test).

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

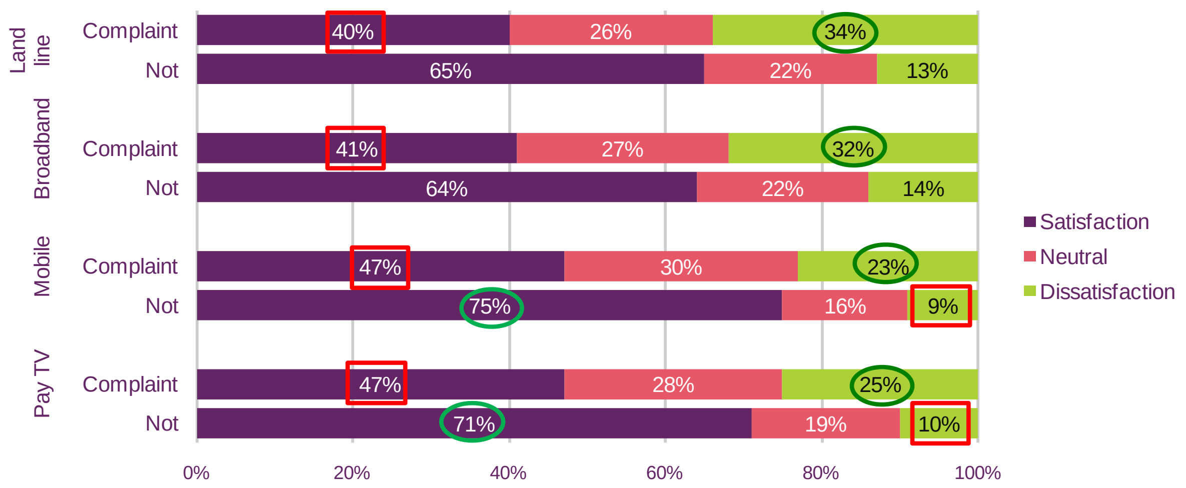
Satisfaction with provider's customer service by whether contact was a complaint

Figure 1.7 (below) shows, for each sector, satisfaction with customer service split by whether or not customers considered their contact to be a complaint.

Customers in each sector were less satisfied (and more dissatisfied) when their call was a complaint. Satisfaction was highest in the mobile and pay TV sectors where the contact was not a complaint.

NB: The question to determine complaints was not asked in 2009.

Figure 1.7: Satisfaction with customer service by whether recent contact was a complaint



Q3: Overall, how satisfied are you with the service you received from [PROVIDER] customer services on this occasion?

Base: All UK households contacting provider: (Complaint/Not): Landline (349/910), Broadband (534/1,247), Mobile (421/1,574), Pay TV (333/1,143).

/ indicates significantly higher/ lower than overall (99% test).

Source: Online survey

Interest in impartial ratings of customer service performance

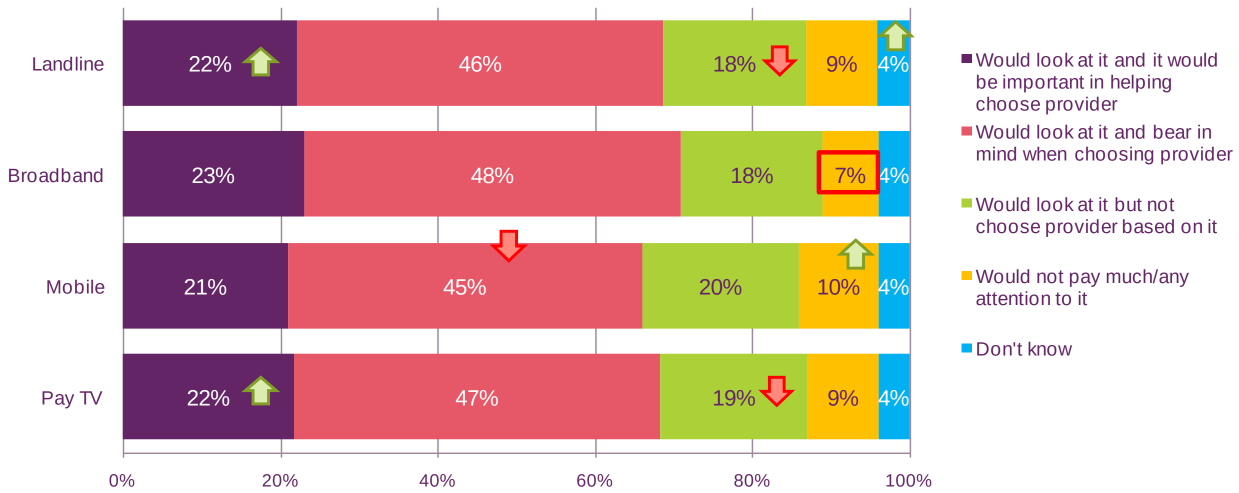
Figure 1.8 (below) shows customer interest in provision of impartial information about different companies' customer service ratings. As with the previous charts, the figures represent only a subsection of consumers; specifically, those who had contacted their service provider in the previous three months.

Across all four sectors, around two thirds of customers suggested that they would at least bear such information in mind when choosing a service provider; a similar level to 2009. Broadband customers were less likely than average to say they would not pay attention to such information.

Since 2009, there have been increases in the proportion of landline and pay TV customers who said this type of information would be important in helping them choose a provider (both up from 18%). There has also been a decline in the proportion of mobile customers who said they would bear such information in mind (down from 49%), and an increase in the proportion who said would not pay much attention (from 8% in 2009).

Figure 1.8: Need for impartial information – All services

(NB: Reported intentions may differ from actual behaviour)



Q8: If you were provided with customer service ratings for different companies, so that you could distinguish between good and bad performance… Which of the following statements do you think would best describe your attitude to that information if you were thinking about changing from [PROVIDER] to an alternative provider …?

Base: All UK households contacting provider: Landline 1,259, Broadband 1,781, Mobile 1,995, Pay TV 1,476.

/ indicates significantly higher/ lower than overall (99% test).

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

NB: It is worth noting in this type of questioning that consumers tend to overstate intention to act and in reality actions are likely to be lower.

Interest in impartial customer service ratings by satisfaction with service

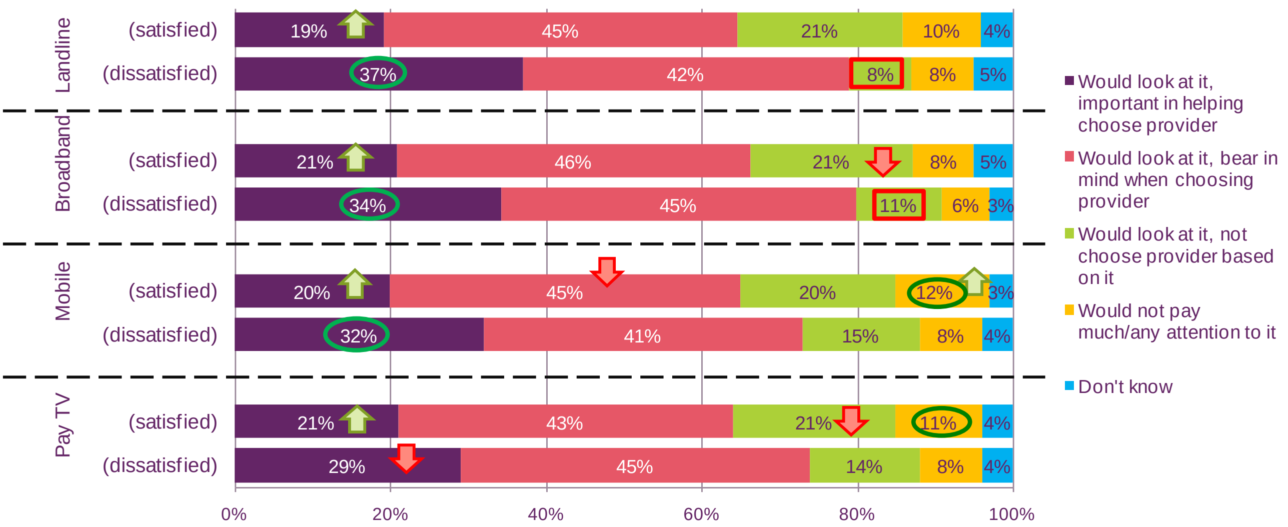
Figure 1.9 (below) also shows interest in impartial information about companies' service ratings, but this time split by satisfied versus dissatisfied customers in each sector. As with previous charts, the figures only represent the subsection of consumers who had contacted their service provider in the previous three months.

The importance of impartial information has increased amongst satisfied customers in the landline, broadband, mobile and pay TV sectors since 2009 (up from 13%, 12%, 16% and 14% respectively).

In the landline, broadband and mobile sectors, dissatisfied customers were more likely than satisfied customers to say that impartial rating information would be important.

Figure 1.9: Need for impartial information – All services

(NB: Reported intentions may differ from actual behaviour)



Q8: If you were provided with customer service ratings for different companies, so that you could distinguish between good and bad performance… Which of the following statements do you think would best describe your attitude to that information if you were thinking about changing from [PROVIDER] to an alternative provider …?

Base: All UK households contacting provider: Landline Sat/Dis 732/240, Broadband Sat/Dis 1,021/341, Mobile Sat/Dis 1,372/232, Pay TV Sat/Dis 952/206.

/ indicates significantly higher/ lower than overall score for each sector (99% test).

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

NB: It is worth noting in this type of questioning that consumers tend to overstate intention to act and in reality actions are likely to be lower.

Landline Sector

This section looks specifically at the landline sector, in terms of service providers contacted, issue type, issue resolution, number of contacts, satisfaction and impact on future use.

Executive Summary

- Overall, the main - and increasing - reasons for contact with a landline provider are to change package/service and because of poor line quality.
- Around two-thirds of issues are considered fully resolved, with one in ten unresolved. Faults and billing queries are less likely to be fully resolved.
- Each provider received a similar proportion of complaints and, overall, customers were less satisfied with the handling of complaints than non-complaints. Satisfaction with customer service for complaints was below average for all providers apart from Sky, and satisfaction with non-complaints was above average for all providers apart from TalkTalk.
- A lower proportion of BT customers, compared with customers of other landline providers, have contacted their provider in the last three months. There has been an increase in BT faults contacts since 2009.
- However, this increase has not impacted negatively on BT's customer satisfaction - there has been an increase in levels of overall satisfaction with both Sky and BT since 2009, and in the rating of their customer service advisers. Sky customers are more satisfied overall than average, rating this provider as having better advisers and standard of advice. TalkTalk customers are more dissatisfied than average, and their advisers are generally rated below average.
- In line with this, Sky customers appear to be more loyal than average, while TalkTalk has a higher proportion of customers that appear less likely than average to stay with this provider.

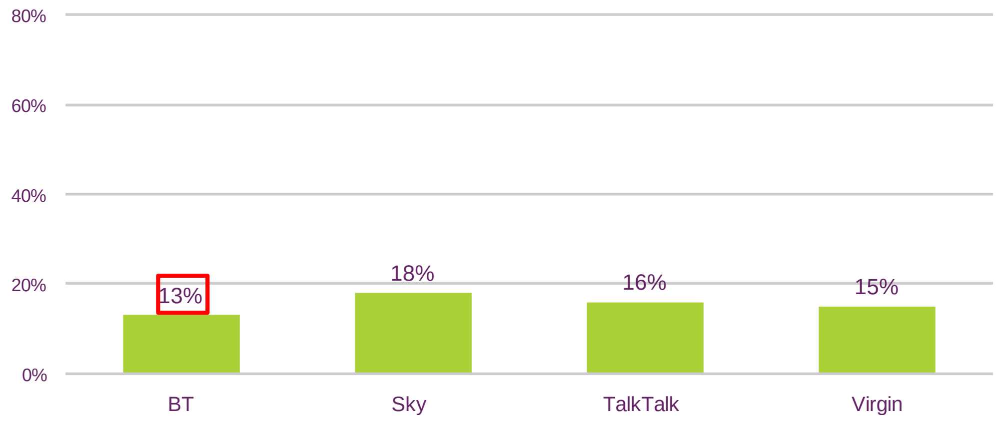
Recent contact with provider

Figure 2.1 (below) shows the proportion of customers of different landline providers who had contacted that provider in the last three months.

Levels of contact were relatively low, and have not changed significantly since 2009.

The proportion of BT customers contacting their provider was lower than the sector average.

Figure 2.1: Landline – Proportion of customers who have contacted their landline provider about an issue in the last three months



Q6: Thinking of [PROVIDER] and the services you buy from them, have you contacted them in the last three months by phone/ email?

Base: All UK households using landline providers: BT 1,552, Sky 222, TalkTalk 430, Virgin 510.

/ indicates significantly higher/ lower than overall (99% test).

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: GfK Omnibus Survey

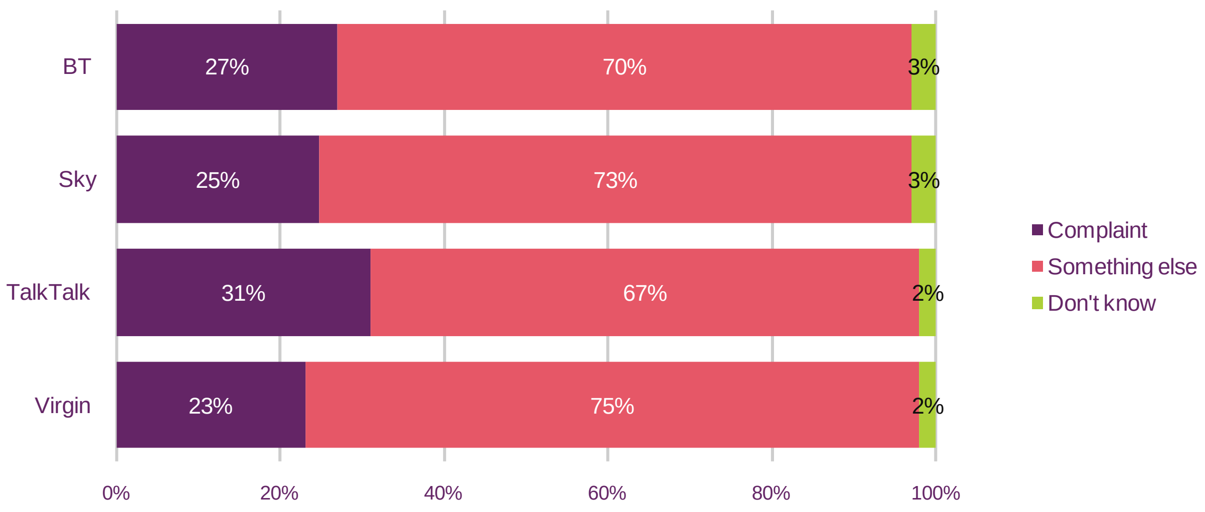
Proportion of complaints

Figure 2.2 (below) shows the proportion of recent contacts to landline providers that were considered to be complaints.

Around a quarter of contacts were deemed to be complaints, according to customers. There was no significant difference between the levels of complaints for the various landline providers.

NB: This question was not asked in 2009.

Figure 2.2: Landline – Whether recent contact was regarding a complaint



Q5a: And in your opinion, was this reason for contact with [PROVIDER] a complaint, or something else?

Base: All UK households contacting landline provider: BT 520, Sky 205, TalkTalk 226, Virgin 308

/ indicates significantly higher/ lower than overall (99% test).

Source: Online survey

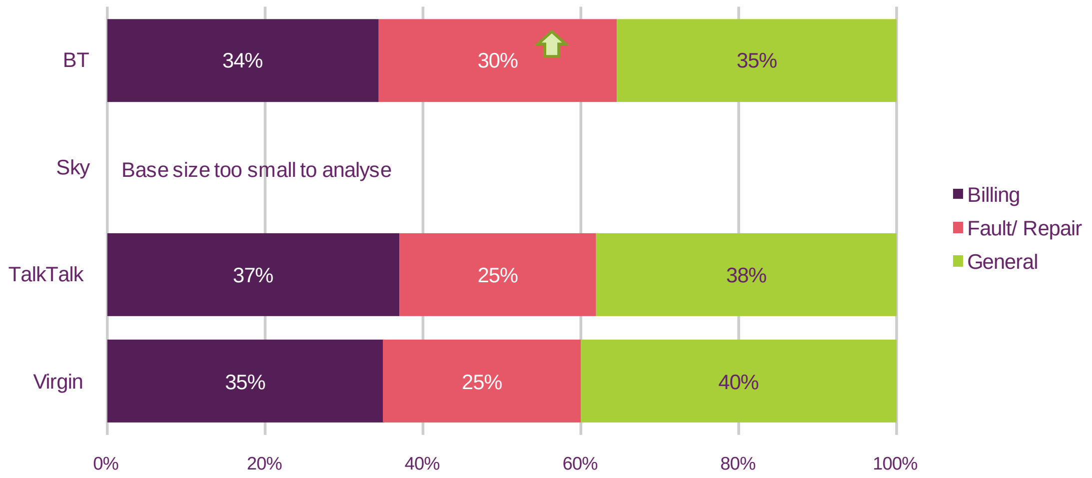
Type of call made most recently with landline provider

Figure 2.3 (below) shows the type of call made to landline providers.

The proportion of faults & repairs enquiries made to BT increased from the 18% in 2009

There were no differences by provider compared with the proportions of call type across the sector as a whole.

Figure 2.3: Landline – Type of call made most recently with landline provider



Q8: Thinking of the most recent issue you had to contact [PROVIDER] about, which of the following categories did the issue fall into?

Base: All UK households contacting landline provider: BT 213, Talk Talk 72, Virgin 82.

/ indicates significantly higher/ lower than overall (99% test).

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: GfK Omnibus Survey

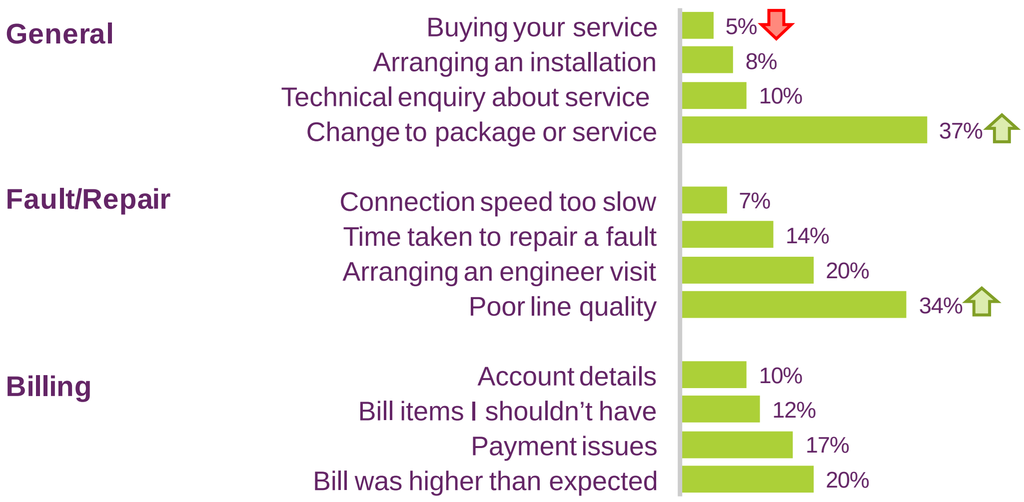
Key issues by contact type

Figure 2.4 (below) shows – for each of the three main types of issue – the most common specific reasons for recent contact with landline service providers. NB: the results are shown as a proportion of each type of call by supplier (general, fault/repair or billing) as shown in Figure 2.3. E.g. calls regarding 'account details' made up 10% of all contacts about billing issues.

The main reasons for contact were to change landline package or service or about poor line quality. The incidence of these issues was significantly higher than in 2009 (up from 28% and 23% respectively), while mention of 'buying service' had decreased (from 11% of contacts regarding general issues in 2009).

Billing enquiries were mainly to do with bills being too high, payment issues or inaccuracies.

Figure 2.4: Landline - Top four issues per contact type



S7: Which of the following best describes what the issue with [PROVIDER] was concerning?

Base: All UK households contacting landline provider: Billing 530, Fault 313, General 416.

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

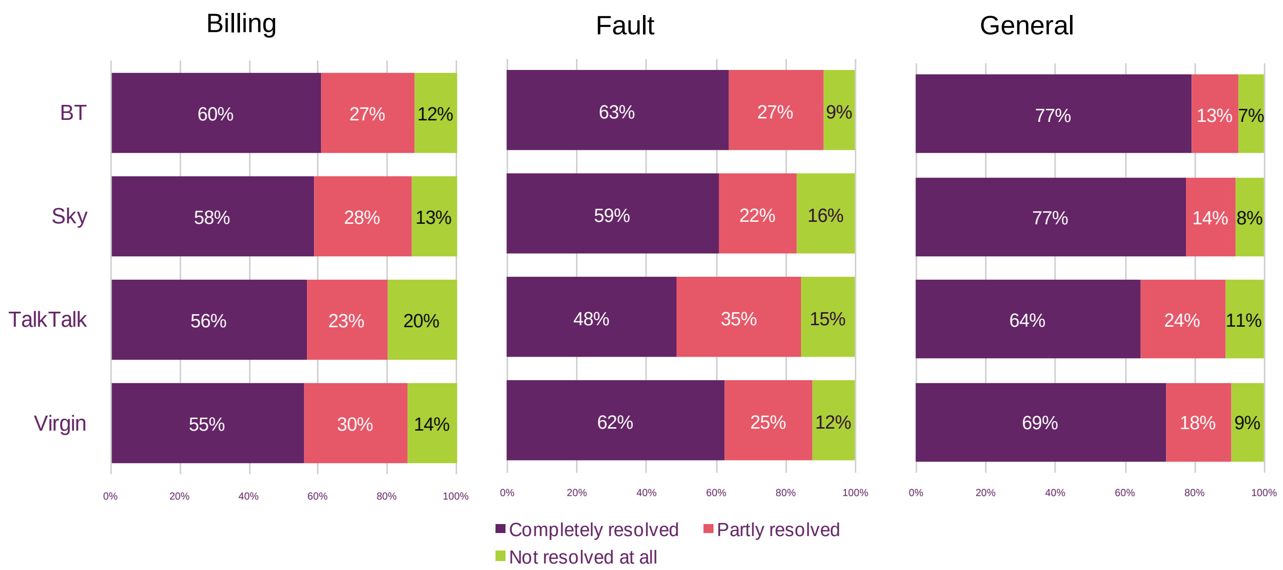
Issue resolution by landline provider

Figure 2.5 (below) shows the degree of issue resolution by landline providers (as perceived by the customer).

There were no significant changes since 2009 in terms of issue resolution.

In the customer's view general queries were more likely to be completely resolved than billing and faults. There were no significant differences versus the average for any providers.

Figure 2.5 Landline – Whether issue is seen as 'resolved'



Q5: In your opinion, was [PROVIDER] able to successfully resolve your issue [billing/ faults/ general enquiries]?

Base: All UK households contacting landline provider: BT 223/120/177, Sky 79/49*/77, TalkTalk 100/60/66 , Virgin 128/84/96.

/ indicates significantly higher/ lower than overall (99% test).

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

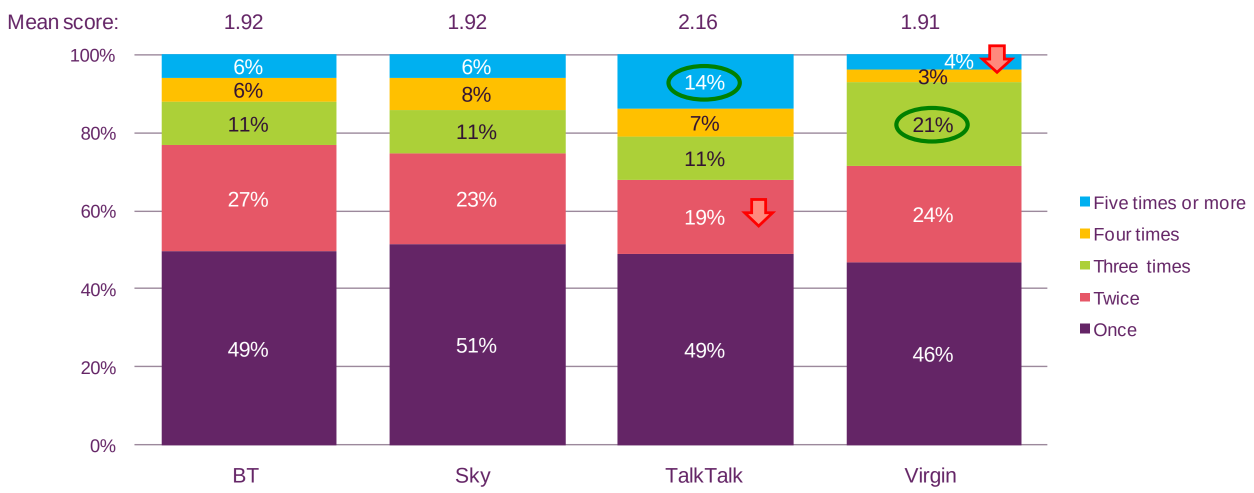
Number of contacts with landline provider

Figure 2.6 (below) shows the number of times customers contacted their landline providers regarding their most recent issue.

There were some changes since 2009 in contact frequency, with a drop in TalkTalk customers contacting twice (down from 28%) and in Virgin customers contacting five times or more (down from 8%).

On average around two contacts were required. Virgin customers were more likely than average to require three contacts per issue, while TalkTalk customers were more likely to need five or more contacts.

Figure 2.6: Landline – Number of contacts made, by provider



Q6: How many times have you been in contact with [PROVIDER] in relation to this particular issue so far?

Base: All UK households contacting landline provider: BT 520, Sky 205, TalkTalk 226, Virgin 308.

/ indicates significantly higher/ lower than overall (99% test).

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

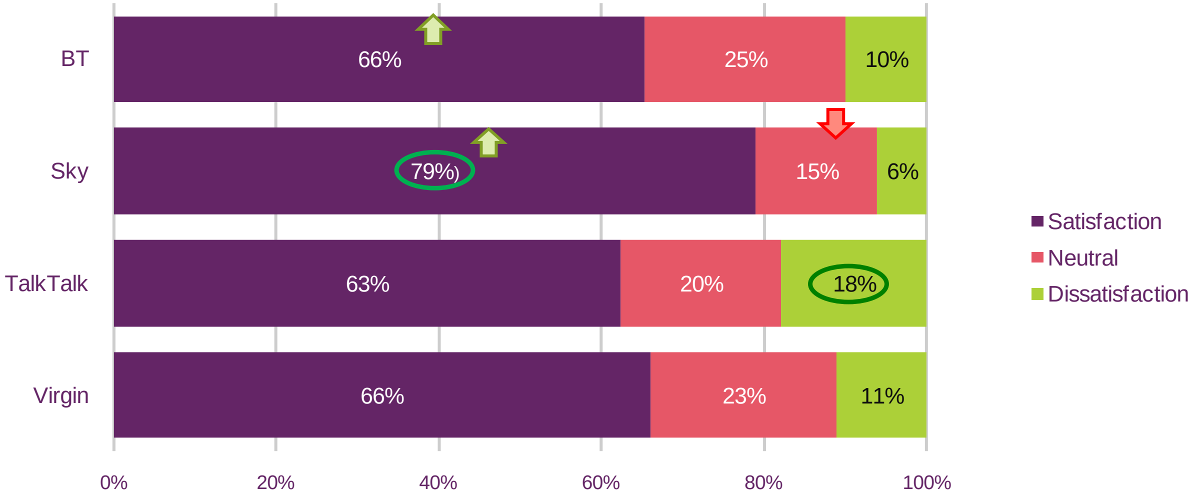
Overall satisfaction with landline provider

Figure 2.7 (below) shows levels of overall satisfaction with landline providers.

Satisfaction with both Sky and BT has increased since 2009 (from 56% and 65% respectively).

Around two thirds of customers were satisfied with their provider, with outright dissatisfaction relatively low. Satisfaction was significantly higher than average for Sky, whilst TalkTalk had higher than average dissatisfaction.

Figure 2.7: Landline – Overall satisfaction by provider



Q1: Overall how satisfied are you with [PROVIDER] as your provider of [SERVICE] on a 1 to 10 scale?

Base: All UK households contacting landline provider: BT 520, Sky 205, TalkTalk 226, Virgin 308.

/ indicates significantly higher/ lower than overall (99% test).

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

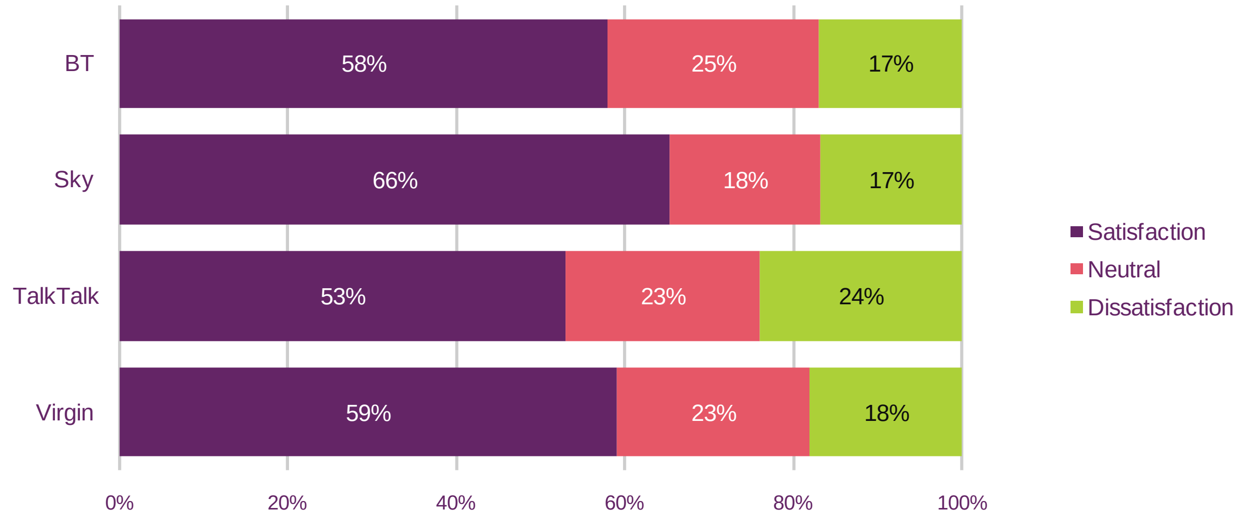
Overall satisfaction with customer service by landline provider

Figure 2.8 (below) shows levels of satisfaction with the customer service of landline providers.

There has been no change in satisfaction levels for any provider since 2009.

There were no significant differences in overall satisfaction versus the average.

Figure 2.8: Landline – Overall satisfaction with customer service by provider



Q3: Overall how satisfied are you with [PROVIDER] as your provider of [service] on a 1 to 10 scale?

Base: All UK households contacting landline provider: BT 520, Sky 205, TalkTalk 226, Virgin 308.

/ indicates significantly higher/ lower than overall (99% test).

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

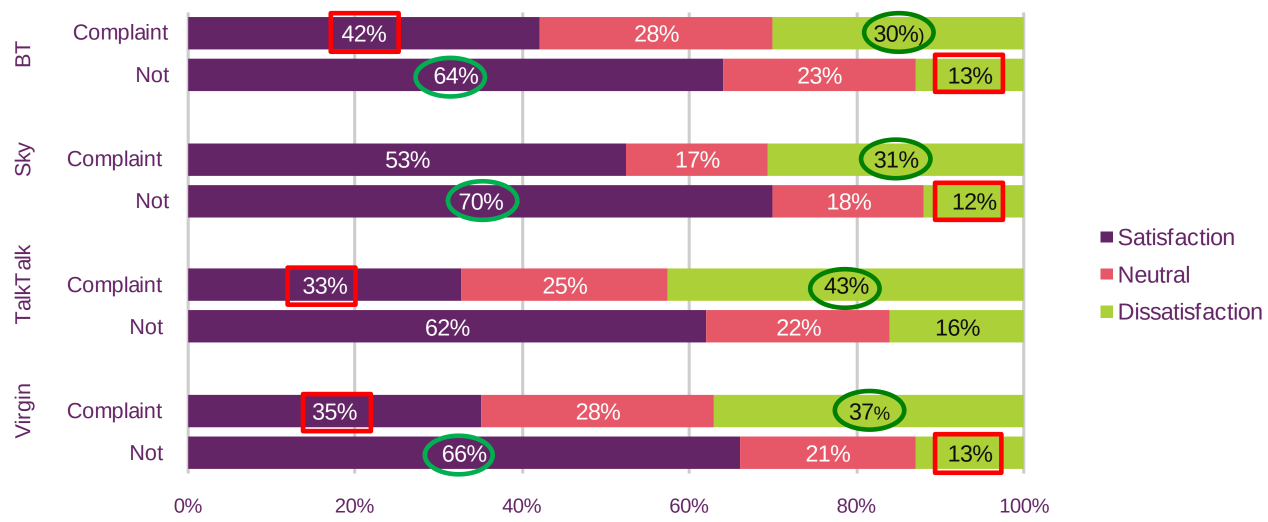
Satisfaction with customer service, by whether contact was complaint

Figure 2.9 (below) shows the level of satisfaction with customer service from landline providers split by whether or not the contact was considered to be a complaint.

For all landline providers, dissatisfaction with customer service was higher when the contact was a complaint.

NB: The question to determine complaints was not asked in 2009.

Figure 2.9: Landline - Satisfaction with customer service by complaint or not



Q3: Overall how satisfied are you with the service you received from [PROVIDER] customer services on this occasion?

Base: All UK households contacting provider: (Complaint/Not): BT 138/382, Sky 59/146, TalkTalk 70/154, Virgin 76/232

/ indicates significantly higher/ lower than overall satisfaction (99% test).

Source: Online survey

Satisfaction with ease of contacting customer service

Figure 2.10 (below) shows mean satisfaction scores on various aspects of contacting customer service, where 10 is extremely satisfied and 1 extremely dissatisfied. Although some statements regarding ease of contacting were removed from the questionnaire in 2011, the remaining statements were unchanged and so comparison between years is valid.

There has been improvement in ease of contacting BT and Sky since 2009, in terms of calling back (up from 5.7 and 6.0 respectively) and ease of getting through to the right person (up from 5.4 and 6.1 respectively). BT has also seen improvement in ease of finding contact details (up from 6.6)

TalkTalk's satisfaction rating was below average on getting through to the right person.

Figure 2.10: Landline – Satisfaction with ease of contacting customer service

	BT	Sky	TalkTalk	Virgin
Ease of finding provider contact details	7.0 ⇧	7.4	6.7	7.4
Calling you back when they said they would	6.6 ⇧	7.1 ⇧	5.9	6.4
Ease of getting through to the right person *(phone only)*	6.3 ⇧	6.8 ⇧	$\boxed{5.7}$	6.6

Q4: How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied.

Base: All UK households contacting provider landline provider: BT 520, Sky 205, TalkTalk 226, Virgin 308.

⬭ / ▭ indicates significantly higher/ lower than overall (99% test).

⇧ / ⇩ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Satisfaction with speed of customer service

Figure 2.11 (below) shows mean satisfaction scores on various aspects to do with the speed of customer service.

Service from BT and Virgin has improved since 2009 on speed of answering phones (both up from 5.7) and time taken to handle issue (both up from 5.9), as has Sky's service on speed of answering phones (from 6.1) There was no improvement since 2009 for TalkTalk.

TalkTalk's performance in terms of speed of customer service is weaker than average.

Figure 2.11: Landline – Satisfaction with the speed of customer service

	BT	Sky	TalkTalk	Virgin
Speed of answering phones *(phone only)*	6.5 ⇧	6.9 ⇧	$\boxed{5.9}$	6.5 ⇧
The time taken to handle issue	6.5 ⇧	6.9	5.9	6.6 ⇧

Q4: How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied.

Base: All UK households contacting landline provider: BT 520, Sky 205, TalkTalk 226, Virgin 308.

/ indicates significantly higher/ lower than overall (99% test).

⇧ / ⇩ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Satisfaction with advice from customer service

Figure 2.12 (below) shows mean satisfaction scores for the standard of advice from customer service.

BT's standard of advice has improved since 2009 on providing easy to understand advice (from 6.2), useful advice (from 6.1) and getting the issue resolved (from 6.1). Advice ratings of other providers have not changed significantly.

Satisfaction with Sky's advice was above average for the sector, while TalkTalk was weaker than average in terms of giving clear advice.

Figure 2.12: Landline – Satisfaction with the standard of advice from customer service

	BT	Sky	TalkTalk	Virgin
Advice/information was easy to understand	6.9 ⇧	7.5	6.2	7.0
Advice/information was useful	6.7 ⇧	7.3	6.2	6.8
Getting the issue resolved to your satisfaction	6.7 ⇧	7.2	6.1	6.7

Q4: How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied.

Base: All UK households contacting landline provider: BT 520, Sky 205, TalkTalk 226, Virgin 308.

/ indicates significantly higher/ lower than overall (99% test).

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Satisfaction with customer service adviser

Figure 2.13 (below) shows mean satisfaction with the customer service adviser.

Satisfaction with BT and Sky advisers has strengthened since 2009 on understanding the problem (from 6.3 and 6.8 respectively), keep the customer informed (from 6.2 and 6.8 respectively), doing what they said (from 6.3 and 7.0 respectively), and logging details (from 5.8 and 6.3 respectively). BT has also strengthened on courtesy (up from 6.9) and taking the question seriously (up from 6.6). There were no significant changes for TalkTalk or Virgin.

Sky was rated significantly above average on all aspects relating to customer service advisers, while TalkTalk was rated below average for all aspects except courtesy and politeness of advisers and advisers doing what they say they would do.

Figure 2.13: Landline – Satisfaction with the adviser of customer service

	BT	Sky	TalkTalk	Virgin
Courtesy and politeness of advisers	7.5 ↑	8.1	7.3	7.4
Adviser ability to understand the issue and identify the problem	6.9 ↑	7.5 ↑	6.3	6.8
Adviser took my questions/ issue seriously	7.2 ↑	7.9	6.7	7.0
Keeping you informed throughout the process	6.8 ↑	7.5 ↑	6.2	6.8
Adviser doing what they say they would do	7.0 ↑	7.7 ↑	6.5	7.1
Logging of query details to avoid having to repeat yourself	6.6 ↑	7.4 ↑	5.7	6.5

Q4: How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied.

Base: All UK households contacting landline provider: BT 520, Sky 205, TalkTalk 226, Virgin 308.

/ indicates significantly higher/ lower than overall (99% test).

↑ / indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Satisfaction with other aspects of customer service

Figure 2.14 (below) shows mean satisfaction scores for more general customer service attributes.

BT's ratings have improved since 2009 on offering compensation (up from 4.3) and willingness to help (from 6.4). Ratings for other providers have not change significantly.

TalkTalk's ratings on both aspects were lower than average.

Figure 2.14: Landline – Satisfaction with other aspects of customer service

	BT	Sky	TalkTalk	Virgin
Offering compensation or a goodwill payment	5.2 ⇧	5.7	4.2	5.1
Willingness to help resolve your issue	7.0 ⇧	7.4	6.4	7.0

Q4: How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied.

Base: All UK households contacting landline provider: BT 520, Sky 205, TalkTalk 226, Virgin 308.

⬭ / ▭ indicates significantly higher/ lower than overall (99% test).

⇧ / ⇩ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Future use of provider given customer service experience

Figure 2.16 (below) shows the likelihood of using each landline provider in the future, in light of the customer service experience during the most recent contact.

There have been no significant changes in levels of claimed loyalty to providers since 2009.

As was seen in 2009, the relatively strong customer service provided by Sky resulted in its customers claiming to be more loyal than on average. TalkTalk's relatively weaker service experience meant its customers were significantly more likely than average to say they would be less likely to use this landline provider again.

Figure 2.16: Landline – Future use of provider given customer experience

Q7: Has the experience of [PROVIDER]'s customer service for this issue made you more likely or less likely to use [PROVIDER] in the future?

Base: All UK households contacting landline provider: BT 520 , Sky 205, TalkTalk 226, Virgin 308.

/ indicates significantly higher/ lower than overall (99% test).

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Broadband sector

This section looks specifically at the broadband sector, in terms of service providers contacted, issue type, issue resolution, number of contacts, satisfaction and impact on future use.

In order to draw valid comparisons over time, TalkTalk and Tiscali data for 2009 has been merged.

Executive Summary

- Connection speed remains the biggest issue in the broadband sector, followed by package change and, increasingly, higher than expected bills. Faults issues are generally least likely to be fully resolved.

- There has been an increase in customer contacts to BT and Virgin regarding broadband services since 2009, and an increase in BT faults contacts (as seen in the landline sector). However, this increased contact with BT and Virgin has not resulted in a negative impact on satisfaction scores.

- Satisfaction with Orange has increased from a weak position in 2009, and satisfaction with its customer service is now higher than average. Orange customers are less likely than average to have made complaints (which typically result in greater dissatisfaction).

- Adviser ratings have improved for Orange, also for BT and to a lesser degree, Sky. Orange and Sky advisers provide a better standard of advice compared with the market overall.

- Overall satisfaction with TalkTalk is significantly below average, and its advisers are also generally rated below average.

- Sky's claimed loyalty is higher than average, while Orange's customer loyalty has increased significantly since 2009. However, TalkTalk's customers claim to be less likely than average to stay with this provider due to the standard of recent customer service.

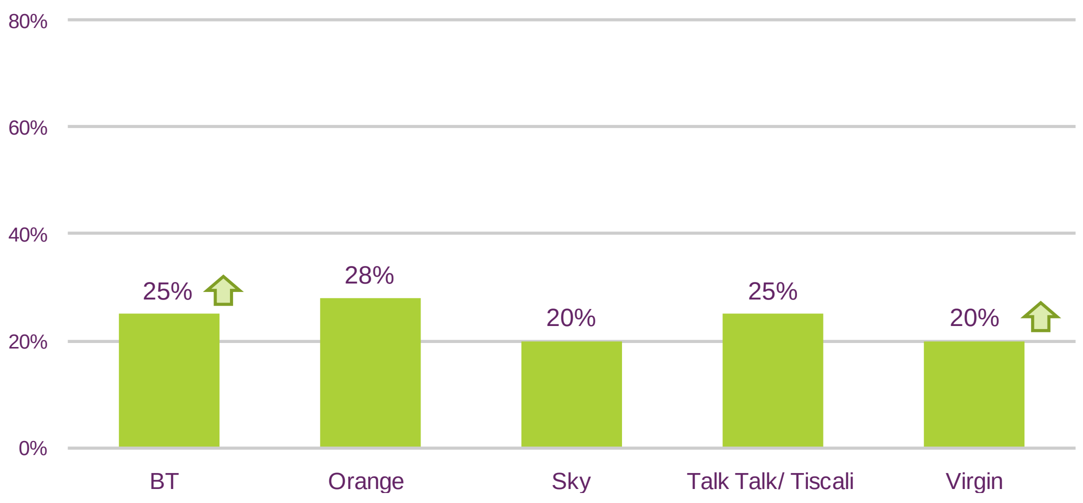
Recent contact with provider

Figure 3.1 (below) shows the proportion of customers of different broadband providers who had contacted that provider in the last three months.

Levels of contact have increased since 2009 amongst BT and Virgin broadband customers (up from 18% and 13% respectively).

Contact levels were generally higher than those for landline providers. No providers had contact levels significantly different from the average for this sector.

Figure 3.1: Broadband – Proportion of customers who have contacted their broadband provider about an issue in the last three months



Q6: Thinking of [PROVIDER] and the services you buy from them, have you contacted them in the last 3 months by phone/ email?

Base: All UK households using broadband providers: BT 703, Orange 62, Sky 353, TalkTalk 487, Virgin 481.

/ indicates significantly higher/ lower than overall (99% test).

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: GfK Omnibus Survey

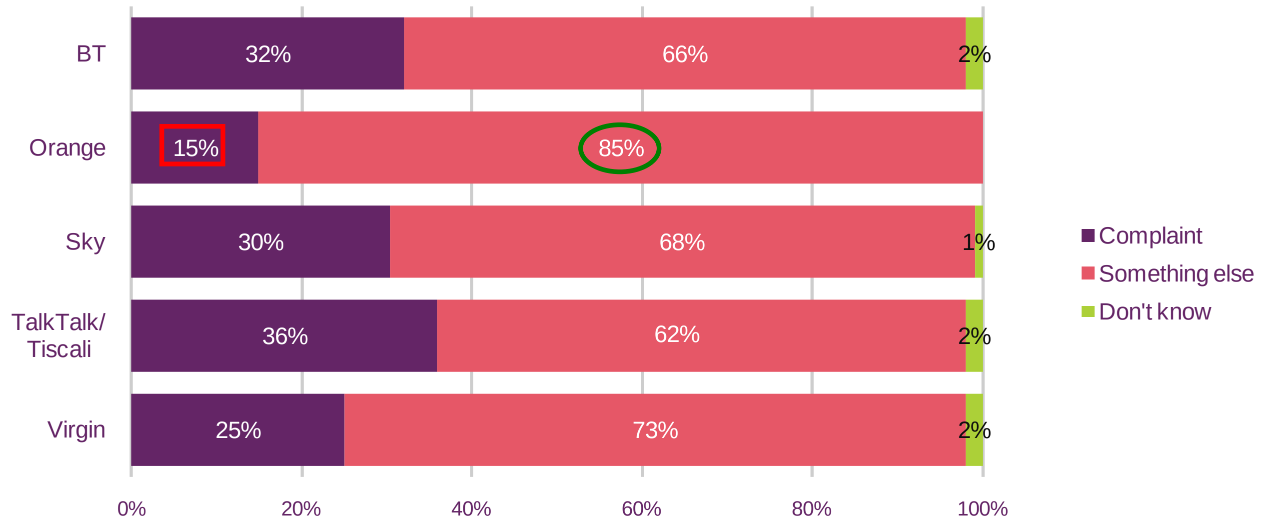
Proportion of complaints

Figure 3.2 (below) shows the proportion of recent contacts that were considered (by customers) to be complaints.

Orange customers were less likely than average to say that they had contacted their provider to make a complaint.

NB: This question was not asked in 2009.

Figure 3.2: Broadband – Whether recent contact was regarding a complaint



Q5a: And in your opinion, was the reason for this contact with [PROVIDER] a complaint, or something else?

Base: All UK households contacting broadband provider: BT 392, Sky 360, TalkTalk 386, Orange 152, Virgin 491.

/ indicates significantly higher/ lower than overall (99% test).

Source: Online survey

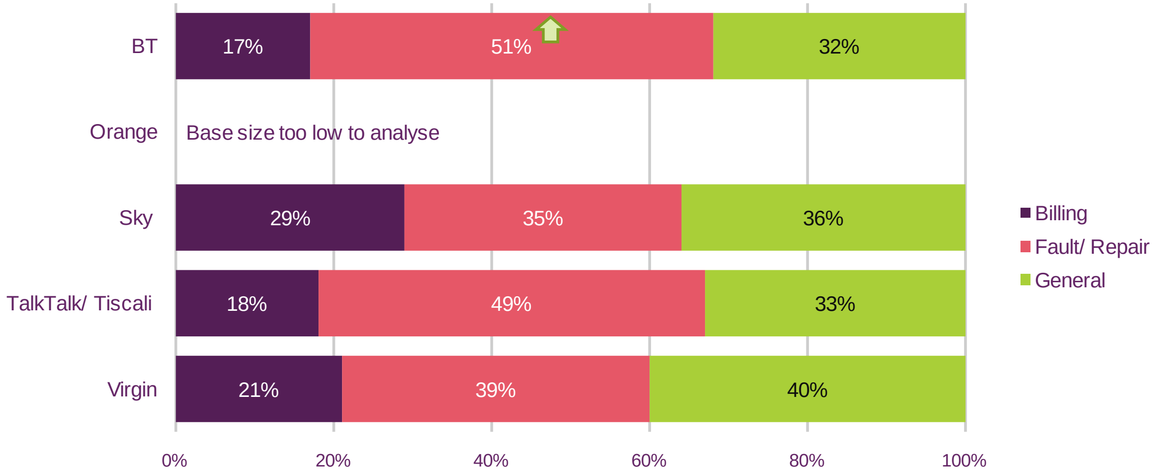
Type of call made most recently with broadband provider

Figure 3.3 (below) shows the type of call made to broadband providers.

The only change since 2009 was an increase in the proportion of faults contacts amongst BT customers (up from 35%) – something also seen amongst BT landline customers.

Billing queries were least common amongst all providers.

Figure 3.3: Broadband – Type of call made most recently with broadband provider



Q8: Thinking of the most recent issue you had to contact [PROVIDER] about, which of the following categories did the issue fall into?

Base: All UK households contacting broadband provider: BT 180, Sky 72, TalkTalk 119, Virgin 98.

/ indicates significantly higher/ lower than overall (99% test).

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: GfK Omnibus Survey

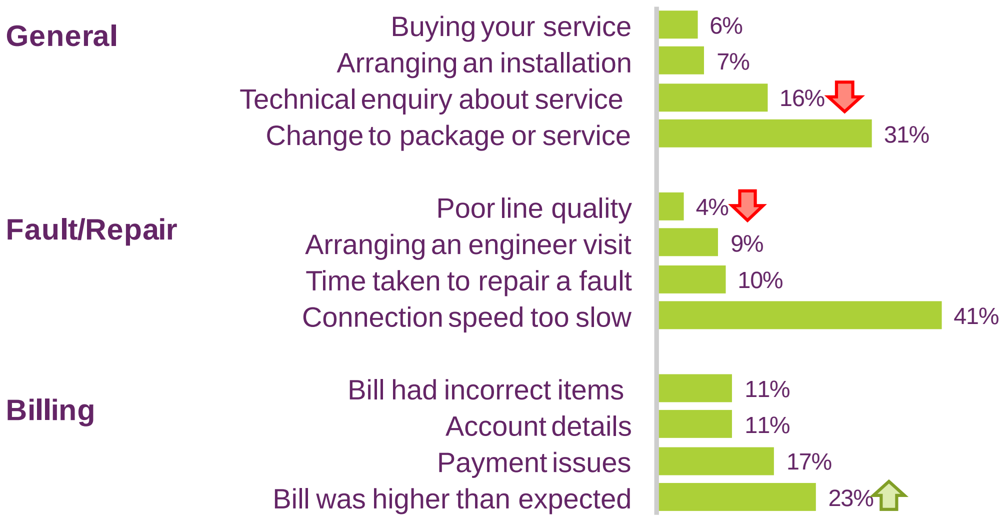
Key issues by contact type

Figure 3.4 (below) shows – for each of the three main reasons for contact – the most common specific reasons for recent contact with broadband service providers. NB: the results are shown as a proportion of each type of call by supplier (general, fault/repair or billing) as shown in Figure 3.3. E.g. calls regarding 'bill had incorrect items' accounted for 11% of all contacts about billing issues.

The most typical reason for contact with a broadband provider remained slow connection speed, followed by changing package or service. There were fewer technical enquiries and complaints about poor line quality than in 2009 (down from 23% and 10% of 'general' contacts respectively).

In the less common area of billing there was an increase since 2009 in the proportion of customers whose bills were higher than expected (up from 13% of contact about billing issues in 2009).

Figure 3.4: Broadband - Top four issues per contact type



S7: Which of the following best describes what the issue with [PROVIDER] was concerning?

Base: All UK households contacting broadband provider: Billing 562, Fault 648, General 571.

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

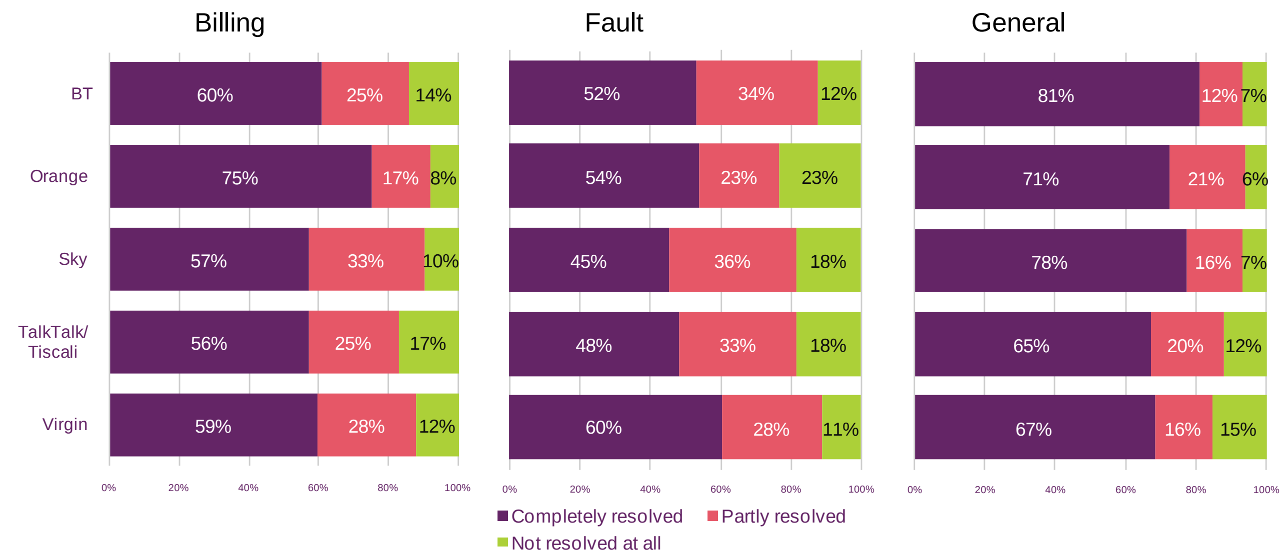
Issue resolution by broadband provider

Figure 3.5 (below) shows the degree of issue resolution by broadband providers (as perceived by the customer).

There were no significant changes since 2009 in levels of issue resolution.

In the consumers' view, general queries were more often completely resolved, while faults were least likely to be resolved. There were no differences by provider.

Figure 3.5: Broadband – Whether issue is seen as 'resolved'



Q5: In your opinion, was [PROVIDER] able to successfully resolve your issue [billing/ faults/ general enquiries]?

Base: All UK households contacting broadband provider for billing/faults/general enquiries: BT 121/146/125, Orange 48*/52/52, Sky 110/130/120, TalkTalk 155/141/123, Virgin 161/179/151.

/ indicates significantly higher/ lower than overall (99% test).

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

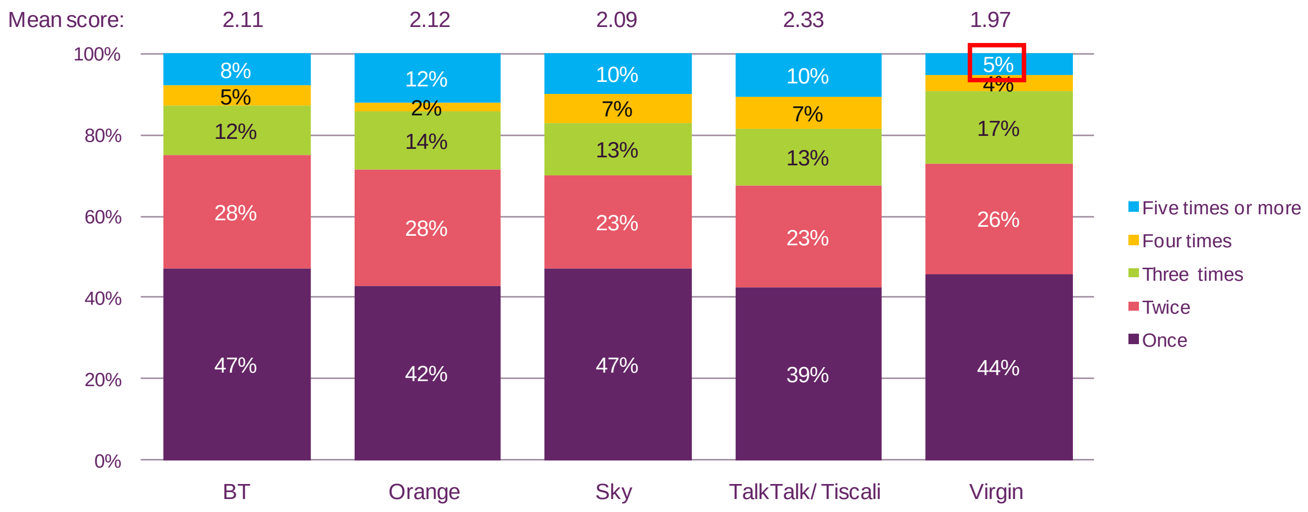
Number of contacts made to service provider

Figure 3.6 (below) shows the number of times customers contacted their broadband provider regarding their most recent issue.

There were no changes since 2009 in the number of contacts to providers.

A similar number of contacts were needed by customers of all broadband providers, although Virgin customers were less likely than average to require five or more contacts.

Figure 3.6: Broadband – Number of contacts made, by provider



Q6: How many times have you been in contact with [PROVIDER] in relation to this particular issue so far?

Base: All UK households contacting provider broadband provider: BT 392, Orange 152, Sky 360, TalkTalk 386, Virgin 491.

/ indicates significantly higher/ lower than overall (99% test).

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

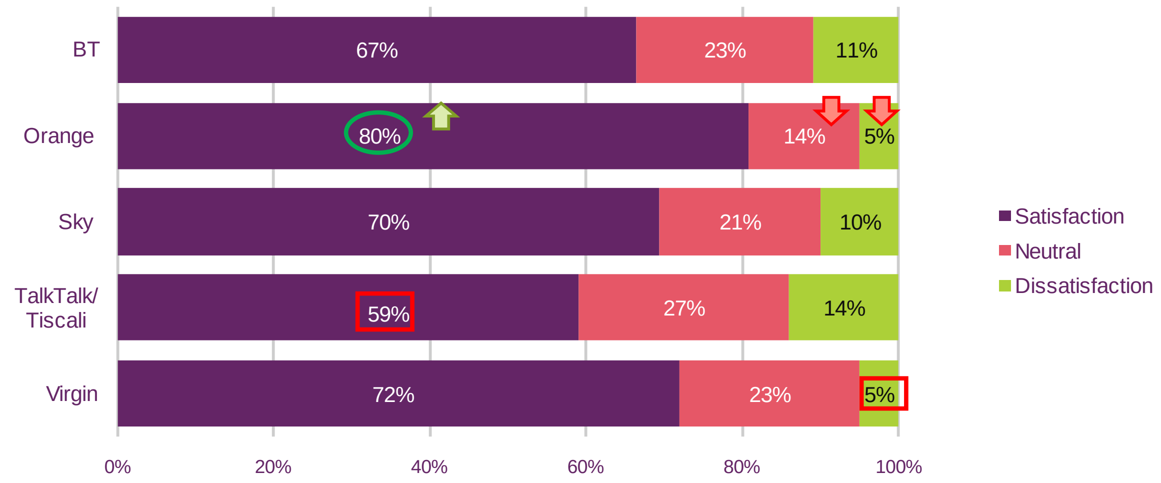
Overall satisfaction by provider

Figure 3.7 (below) shows levels of overall satisfaction with broadband providers.

Overall satisfaction with Orange has improved significantly since 2009 (up from 40%).

Satisfaction with Orange was significantly above average, while satisfaction with TalkTalk was below average. Dissatisfaction with Virgin was below average.

Figure 3.7: Broadband – Overall satisfaction by provider



Q1: Overall how satisfied are you with [PROVIDER] as your provider of [service] on a 1 to 10 scale?

Base: All UK households contacting broadband provider: BT 392, Orange 152, Sky 360, TalkTalk 386, Virgin 491.

/ indicates significantly higher/ lower than overall (99% test).

/ indicates significant increase/ decrease versus previous wave (99% test).

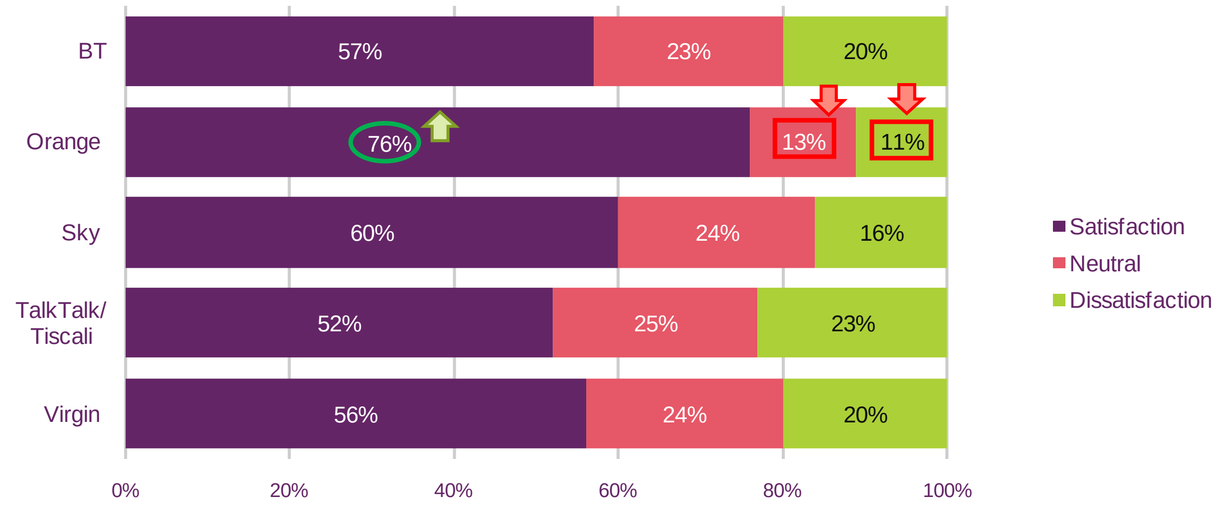
Source: Online survey

Overall satisfaction with customer service by provider

Figure 3.8 (below) shows levels of satisfaction with the customer service of broadband providers.

Satisfaction with Orange customer service has also improved since 2009 (up from 42%), and is above the market average.

Figure 3.8: Broadband – Overall satisfaction with customer service by provider



Q3: Overall how satisfied are you with the service you received from [PROVIDER] customer services on this occasion?

Base: All UK households contacting broadband provider: BT 392, Orange 152, Sky 360, TalkTalk 386, Virgin 491.

/ indicates significantly higher/ lower than overall (99% test).

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

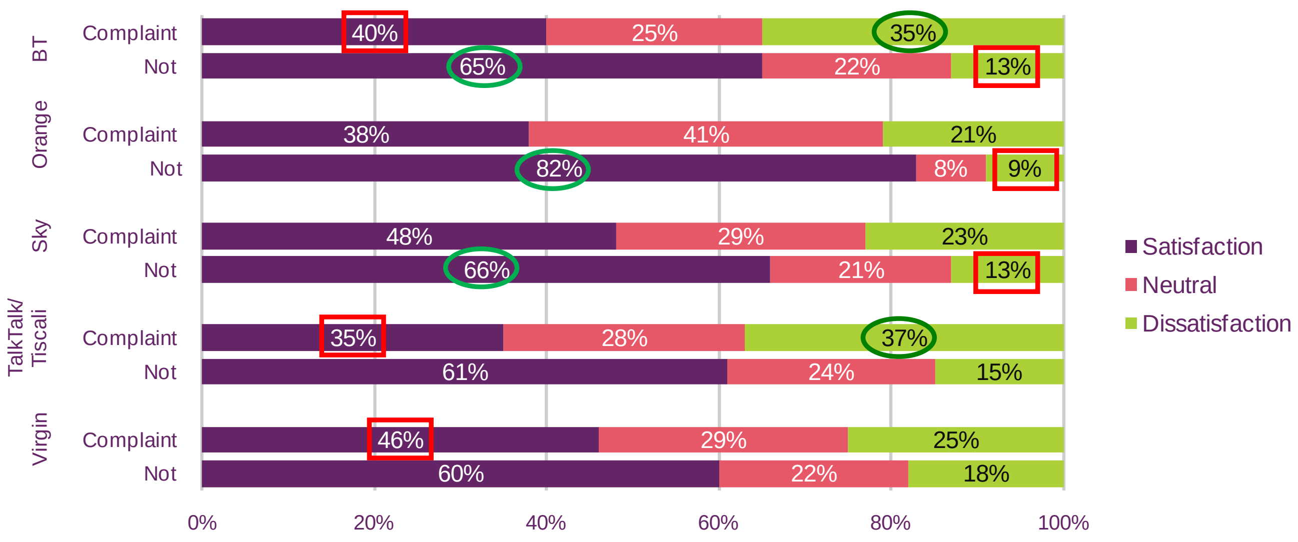
Satisfaction with customer service, by whether contact was a complaint

Figure 3.9 (below) shows the level of satisfaction with customer service from broadband providers, split by whether or not the contact was a complaint.

For all providers, satisfaction was higher when the contact was not a complaint. Satisfaction was lower than average for BT and TalkTalk complaints.

NB: The question to determine complaints was not asked in 2009.

Figure 3.9: Broadband - Satisfaction with customer service by complaint or not



Q3: Overall how satisfied are you with the service you received from [PROVIDER] customer services on this occasion?

Base: All UK households contacting provider: (Complaint/Not): BT 120/272, Sky 112/248, TalkTalk 138/248, Orange 38*/114, Virgin 126/365.

/ indicates significantly higher/ lower than overall (99% test).

Source: Online survey

Satisfaction with ease of contacting customer service

Figure 3.10 (below) shows mean satisfaction scores on various aspects of contacting customer service, based on 10 being extremely satisfied and 1 being extremely dissatisfied.

BT and Orange improved their satisfaction ratings since 2009 on ease of finding contact details (from 6.5 and 5.7 respectively), calling back (from 6.0 and 4.6 respectively) and ease of getting through to the right person (from 5.2 and 4.6 respectively). Sky and Virgin improved their ratings on callbacks (up from 5.9 and 5.7 respectively).

TalkTalk has not made any improvements on these aspects since 2009 and was rated below average in terms of callbacks and on ease of getting through to the right person.

Figure 3.10: Broadband – Satisfaction with ease of contacting customer service

	BT	Orange	Sky	TalkTalk/ Tiscali	Virgin
Ease of finding provider contact details	7.0	7.5	7.0	6.7	7.3
Calling you back when they said they would	6.8	6.6	7.0	5.7	6.3
Ease of getting through to the right person *(phone only)*	6.3	6.5	6.5	5.8	6.3

Q4: How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied.

Base: All UK households contacting broadband provider: BT 392, Orange 152, Sky 360, TalkTalk 386, Virgin 491.

/ indicates significantly higher/ lower than overall (99% test).

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Satisfaction with speed of customer service

Figure 3.11 (below) shows mean satisfaction scores on various aspects to do with the speed of customer service.

BT and Orange increased their ratings since 2009 for speed of answering phones (up from 5.7 and 5.0 respectively) and time taken to handle issue (up from 5.9 and 4.9 respectively). Sky and Virgin improved on speed of answering (from 5.8 and 5.9 respectively).

TalkTalk showed no improvement since 2009 and was rated lower than average in terms of satisfaction with both speed of answering phones and time taken to handle the issue.

Figure 3.11: Broadband – Satisfaction with the speed of customer service

	BT	Orange	Sky	TalkTalk/ Tiscali	Virgin
Speed of answering phones *(phone only)*	6.6 ⇧	6.9 ⇧	6.5 ⇧	$\boxed{6.0}$	6.4 ⇧
The time taken to handle issue	6.5 ⇧	6.8 ⇧	6.5	$\boxed{5.8}$	6.4

Q4: How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied.

Base: All UK households contacting broadband provider: BT 392, Orange 152, Sky 360, TalkTalk 386, Virgin 491.

◯ / ☐ indicates significantly higher/ lower than overall (99% test).

⇧ / ⇩ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Satisfaction with advice from customer service

Figure 3.12 (below) shows mean satisfaction scores for the standard of advice from customer service.

Orange improved significantly since 2009 on giving advice that was easy to understand (from 5.7) and useful (from 5.5), and getting the issue resolved (up from 5.4). Sky improved its rating of advice being easy to understand (up from 6.7).

Orange and Sky were generally rated above average (apart from Sky on issue resolution), while TalkTalk was rated below average on advice being easy to understand and issue resolution.

Figure 3.12: Broadband – Satisfaction with the standard of advice from customer service

	BT	Orange	Sky	TalkTalk/ Tiscali	Virgin
Advice/information was easy to understand	6.6	7.3	7.2	6.2	6.7
Advice/information was useful	6.5	7.3	7.0	6.1	6.5
Getting the issue resolved to your satisfaction	6.7	7.4	6.8	5.9	6.5

Q4: How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied.

Base: All UK households contacting broadband provider: BT 392, Orange 152, Sky 360, TalkTalk 386, Virgin 491.

/ indicates significantly higher/ lower than overall (99% test).

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Satisfaction with customer service adviser

Figure 3.13 (below) shows mean satisfaction with the customer service adviser.

Orange showed significant improvement since 2009 on all adviser attributes (up from 6.7, 5.6, 6.2, 5.3, 5.7 and 5.2 respectively). BT and Sky improved their ratings on courtesy (both up from 7.3), taking the issue seriously (from 6.9 and 7.0 respectively), following through (from 6.6 and 6.7 respectively), and BT additionally for logging details (up from 5.7).

Satisfaction with Orange was significantly above average for keeping the customer informed, while Sky advisers were rated above average on understanding the problem and logging details. TalkTalk advisers, however, were rated below average on understanding the problem, keeping the customer informed, following through and logging of details.

Figure 3.13: Broadband – Satisfaction with the adviser of customer service

	BT	Orange	Sky	TalkTalk/ Tiscali	Virgin
Courtesy and politeness of advisers	7.7	8.1	7.8	7.4	7.5
Adviser ability to understand the issue and identify the problem	6.7	7.2	7.1	6.2	6.7
Adviser took my questions/issue seriously	7.3	7.7	7.5	6.8	6.9
Keeping you informed throughout the process	6.7	7.5	7.0	6.2	6.6
Adviser doing what they say they would do	7.2	7.4	7.3	6.3	7.0
Logging of query details to avoid having to repeat yourself	6.4	6.6	6.8	5.8	6.3

Q4: How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied.

Base: All UK households contacting broadband provider: BT 392, Orange 152, Sky 360, TalkTalk 386, Virgin 491.

/ indicates significantly higher/ lower than overall (99% test).

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Satisfaction with other aspects of customer service

Figure 3.14 (below) shows mean satisfaction scores for more general customer service attributes.

Orange improved its ratings on both compensation and willingness to resolve your issue since 2009 (up from 3.4 and 5.9 respectively), while BT improved in terms of willingness (up from 6.8), and Virgin improved on offering compensation (up from 4.8).

Virgin was rated significantly above average on offering compensation, while TalkTalk advisers were rated below average on willingness to help.

In general, ratings remained relatively low in terms of satisfaction with offering compensation.

Figure 3.14: Broadband – Satisfaction with <u>other aspects</u> of customer service

	BT	Orange	Sky	TalkTalk/ Tiscali	Virgin
Offering compensation or a goodwill payment	4.5	5.3 ⇧	5.3	4.4	5.4 ⇧
Willingness to help resolve your issue	7.2 ⇧	7.4 ⇧	7.2	6.5	7.0

Q4: How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied.

Base: All UK households contacting broadband provider: BT 392, Orange 152, Sky 360, TalkTalk 386, Virgin 491.

⬭ / ▭ indicates significantly higher/ lower than overall (99% test).

⇧ / ⇩ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

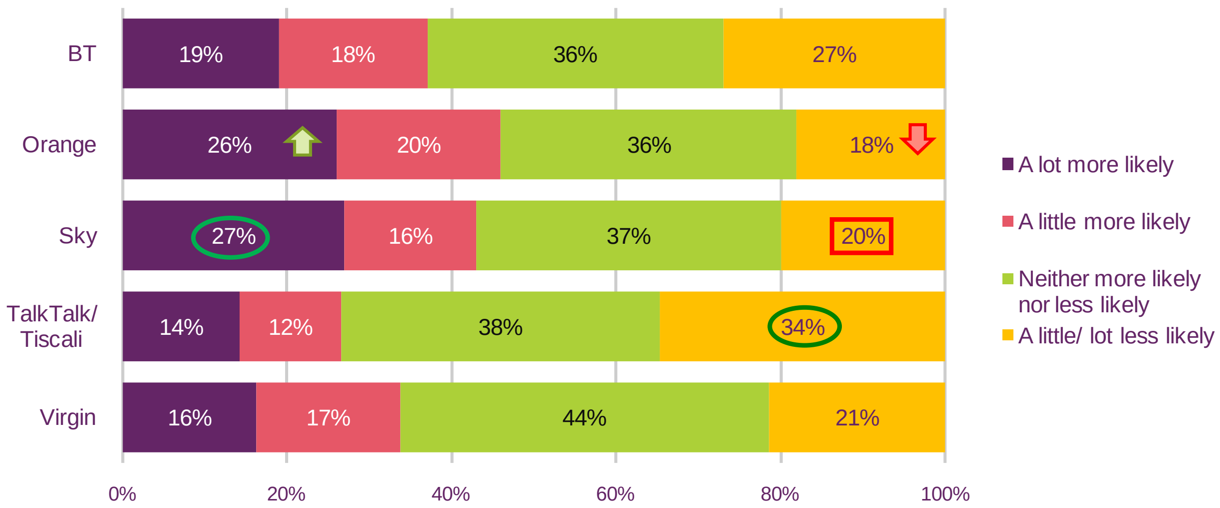
Future use of provider given customer service experience

Figure 3.15 (below) shows the likelihood of using each broadband provider in the future, in light of the customer service experience during the most recent contact.

Orange has shifted from having the weakest satisfaction ratings in 2009 to some of the highest, and this has resulted in a significant uplift in claimed loyalty for this provider (up from 10%), and a drop in those saying they would not stay with Orange (down from 42%).

The relatively strong customer service provided by Sky was reflected in above average claimed loyalty to this provider. In line with their weaker satisfaction ratings, TalkTalk customers were significantly less likely than average to say they would use this broadband provider in future.

Figure 3.15: Broadband – Future use of provider given customer service experience



Q7: Has the experience of [PROVIDER]'s customer service for this issue made you more likely or less likely to use [PROVIDER] in the future?

Base: All UK households contacting broadband provider: BT 392, Orange 152, Sky 360, TalkTalk 386, Virgin 491.

/ indicates significantly higher/ lower than overall (99% test).

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Mobile phone sector

This section looks specifically at the mobile phone sector, in terms of service providers contacted, issue type, issue resolution, number of contacts, satisfaction and impact on future use.

Executive Summary

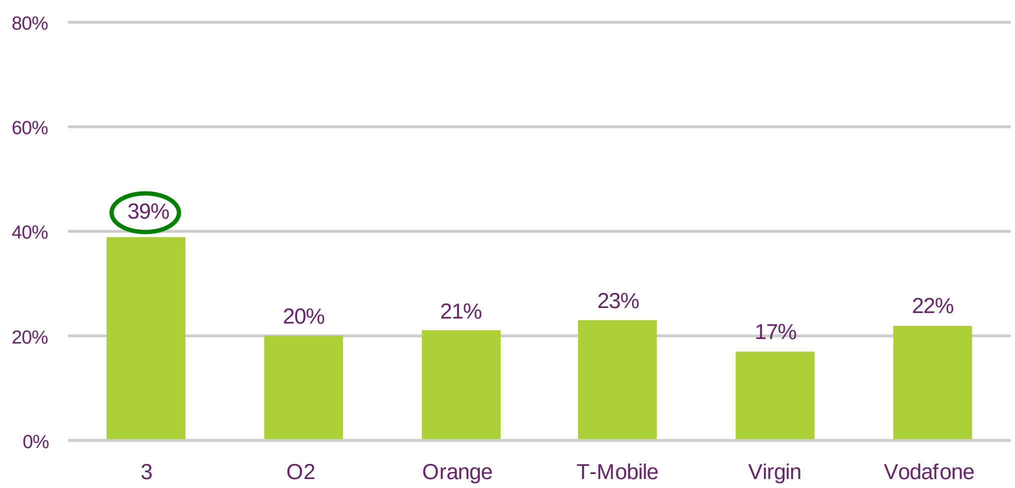
- General enquiries, most typically changing package, are well handled by mobile phone providers. There are fewer faults enquiries; these are dominated by poor reception/coverage and are less well resolved.
- 3 remains more likely to have been contacted by its customers in the last 3 months and has higher proportions of faults issues and complaints than average.
- Overall satisfaction with 3, Orange and T-Mobile has increased since 2009.
- There has been an increase in adviser ratings for Orange and T-Mobile and, to a lesser extent, Vodafone and O2. 3 advisers are significantly below average at understanding the customer and giving clear advice.
- Unlike for most of the other providers, there was a slight weakening in most adviser ratings for Virgin since 2009, and Virgin customer loyalty has subsequently dropped back from its lead position.

Recent contact with provider

Figure 4.1 (below) shows the proportion of customers of different mobile phone providers who had contacted that provider in the last three months.

There were no changes in contact frequency since 2009, but as in 2009 the level of recent contact with 3 was significantly higher than average.

Figure 4.1: Mobile – Proportion of customers who have contacted their mobile provider about an issue in the last three months



Q6: Thinking of [PROVIDER] and the services you buy from them, have you contacted them in the last 3 months by phone/ email?

Base: All UK households using mobile phone providers: 3 176, O2 637, Orange 606, T-Mobile 284, Virgin 160, Vodafone 461.

/ indicates significantly higher/ lower than overall (99% test).

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: GfK Omnibus Survey

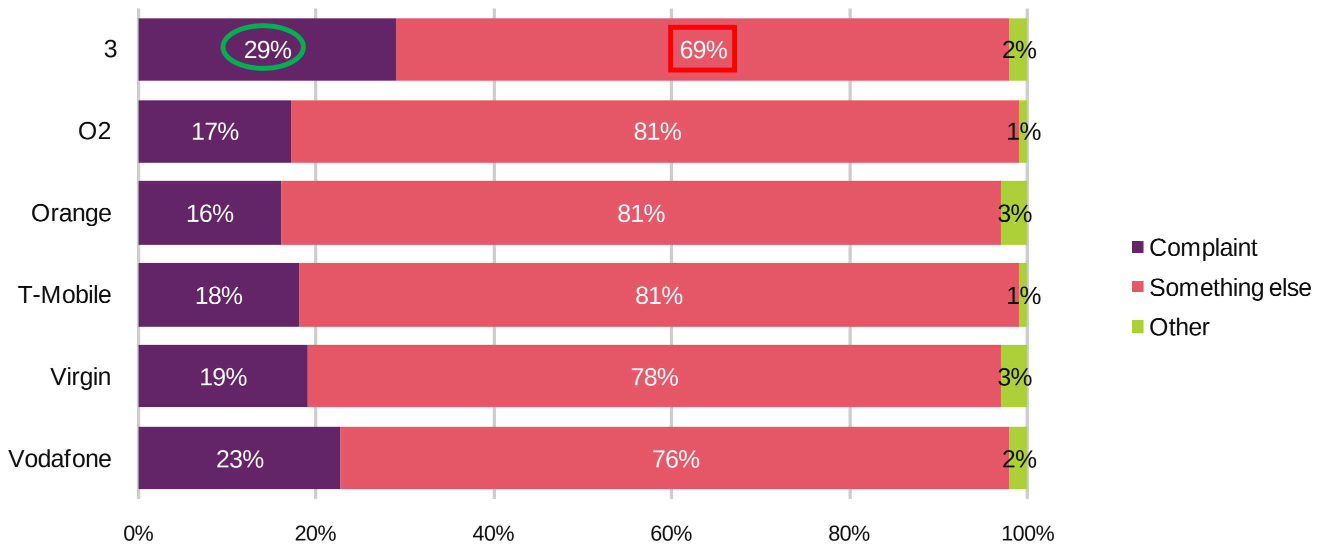
Proportion of complaints

Figure 4.2 (below) shows the proportion of recent contacts that were considered (by customers) to be complaints.

3 customers were more likely than average to say that they had contacted their provider to make a complaint.

NB: This question was not asked in 2009.

Figure 4.2: Mobile – Whether recent contact was regarding a complaint



Q5a: And in your opinion, was the reason for this contact with [PROVIDER] a complaint, or something else?

Base: All UK households contacting mobile phone provider: 3 200, O2 491, Orange 429, T-Mobile 302, Virgin 171, Vodafone 402.

/ indicates significantly higher/ lower than overall (99% test).

Source: Online survey

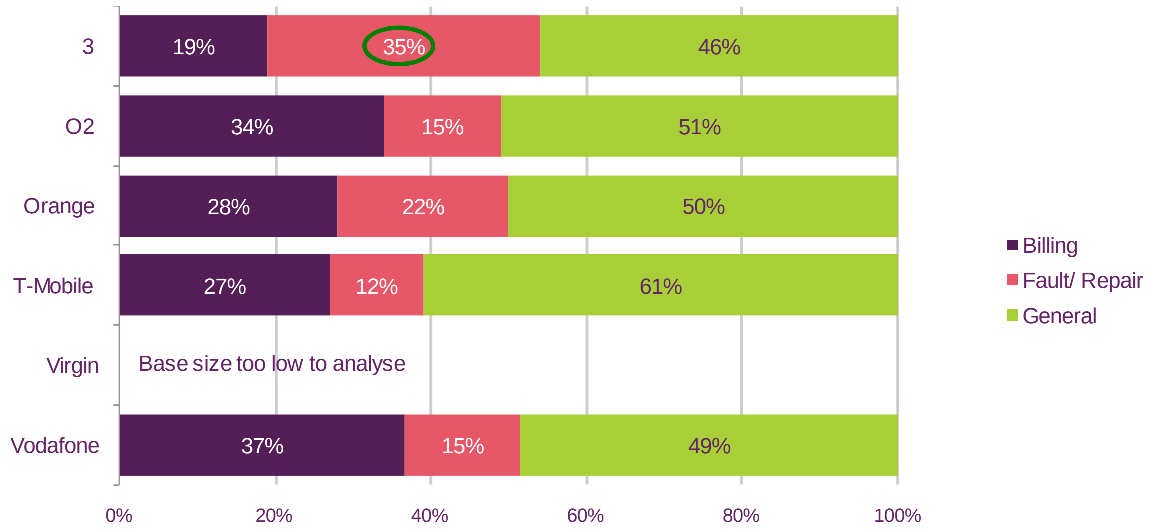
Type of call made most recently to mobile provider

Figure 4.3 (below) shows the type of call made to mobile phone providers.

The proportion of billing contacts to 3 has declined since 2009 (from 37%).

General queries were most prevalent. There were relatively few differences by providers, with the exception of 3, which had significantly more faults contacts than average.

Figure 4.3: Mobile – Type of call made most recently with mobile provider



Q8: Thinking of the most recent issue you had to contact [PROVIDER] about, which of the following categories did the issue fall into?

Base: All UK households contacting mobile phone provider: 3 66, O2 127, Orange 131, T-Mobile 64, Vodafone 102.

/ indicates significantly higher/ lower than overall (99% test).

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: GfK Omnibus Survey

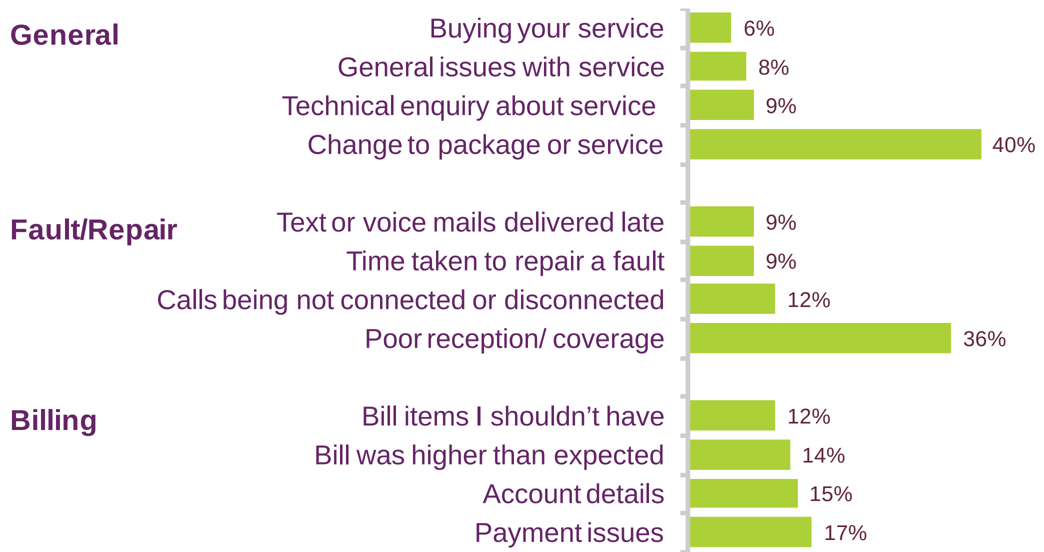
Key issues by contact type

Figure 4.4 (below) shows – for each of the three main types of issue – the most common specific reasons for recent contact with mobile phone service providers. NB: the results are shown as a proportion of each type of call by supplier (general, fault/repair or billing) as shown in Figure 4.3. E.g. calls regarding 'bill was higher than expected'' accounted for 14% of all contacts about billing issues.

There were no significant differences in key issues compared with 2009.

The main reason for recent general customer contact remained changing package or service. In the less common area of faults the main issue was poor reception or coverage, and there was a range of billing issues.

Figure 4.4: Mobile - Top four issues per contact type



S7: Which of the following best describes what the issue with [PROVIDER] was concerning?

Base: All UK households contacting mobile phone provider: Billing 781, Fault 378, General 836.

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

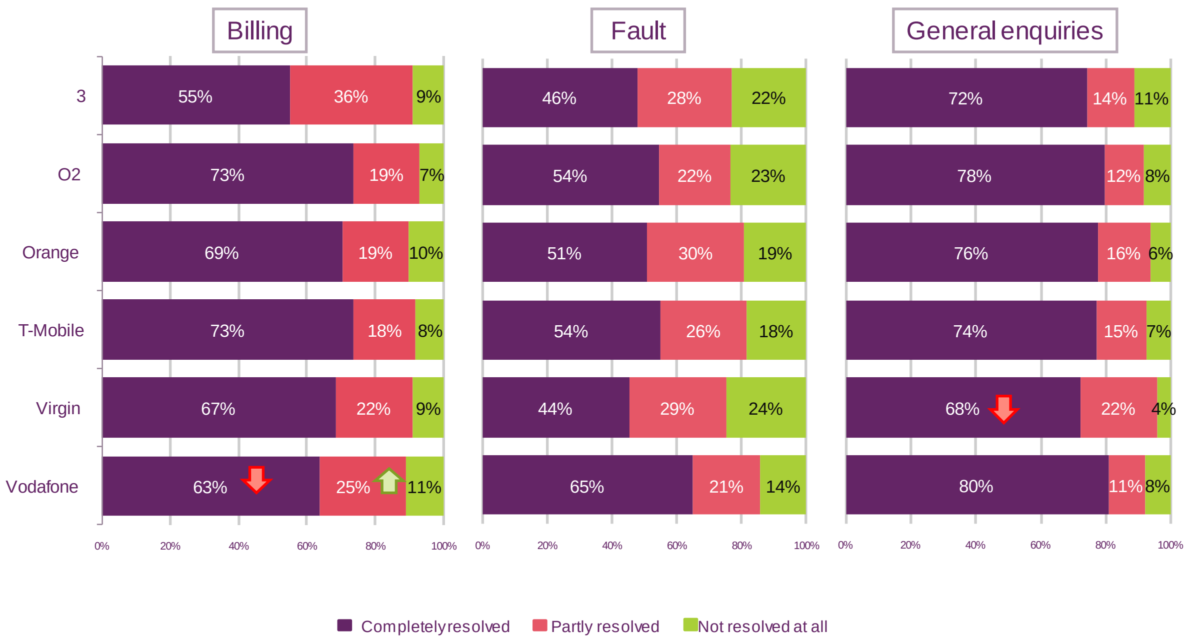
Issue resolution by mobile provider

Figure 4.5 (below) shows the degree of issue resolution by mobile phone providers (as perceived by the customer).

Since 2009 there has been a drop in full resolution of Virgin general enquiries (down from 90%), and a shift from full resolution (down from 75%) to partial resolution (up from 11%) of Vodafone billing issues.

There were no significant differences to the average by provider in terms of fault resolution. General queries typically had the highest claimed resolution rates, while faults were least likely to be completely resolved.

Figure 4.5: Mobile – Whether issue is seen as 'resolved'



Q5: In your opinion, was [PROVIDER] able to successfully resolve your issue?

Base: All UK households contacting mobile phone provider [Billing/ Fault/ General]: 3 67/50/83, O2 201/79/211, Orange 167/88/174, T-Mobile 118/61/123, Virgin 64/34*/73, Vodafone 164/66/172.

/ indicates significantly higher/ lower than overall (99% test).

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

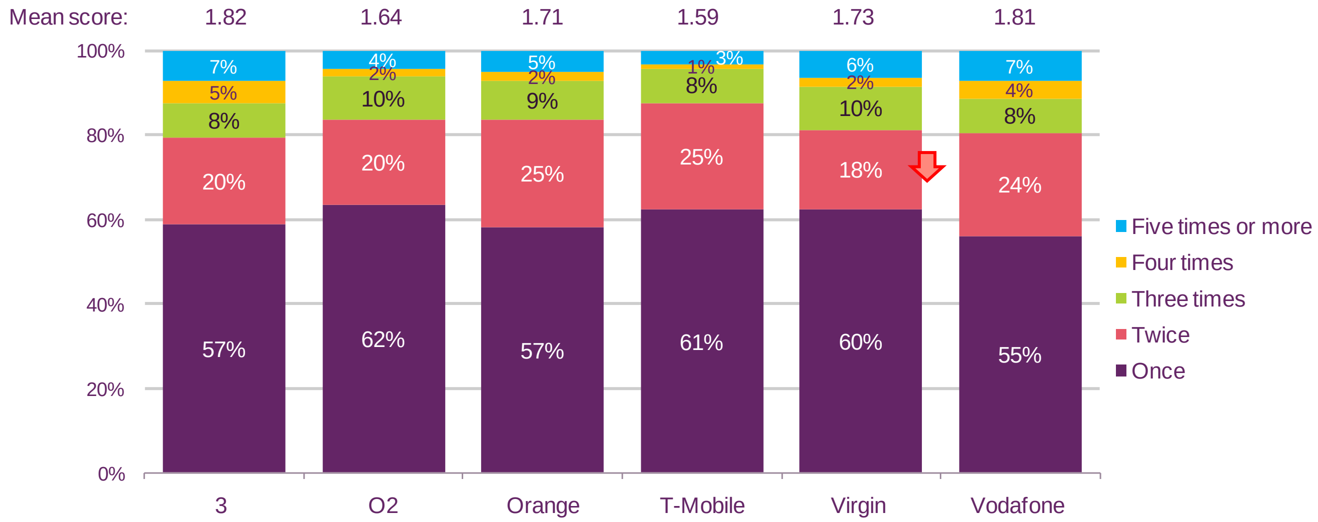
Number of contacts made with service provider

Figure 4.6 (below) shows the number of times customers contacted their mobile phone provider regarding their most recent issue.

The only change since 2009 was a drop in the proportion of Virgin customers contacting their provider twice, but there was no change in the average number of contacts required to Virgin.

Mobile customers typically required fewer contacts with their provider than landline and broadband customers, but no provider scores were significantly different to the average.

Figure 4.6: Mobile – Number of contacts made, by provider



Q6: How many times have you been in contact with [PROVIDER] in relation to this particular issue so far?

Base: All UK households contacting mobile phone provider: 3 200, O2 491, Orange 429, T-Mobile 302, Virgin 171, Vodafone 402.

/ indicates significantly higher/ lower than overall (99% test).

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

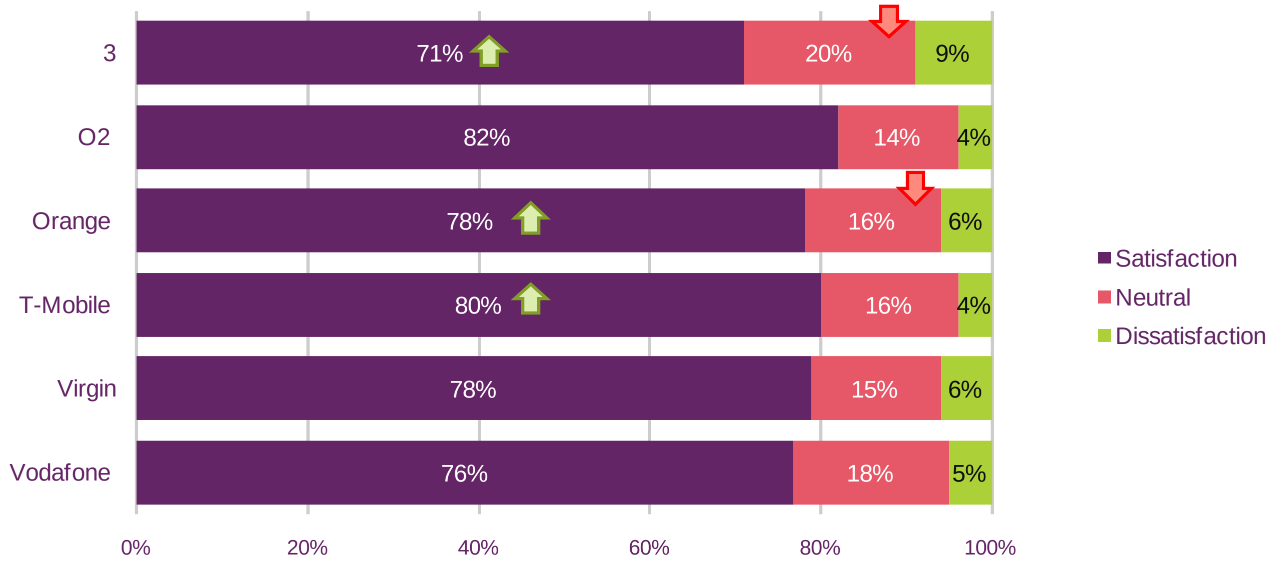
Overall satisfaction by provider

Figure 4.7 (below) shows levels of overall satisfaction with mobile phone providers.

Satisfaction with 3, Orange and T-Mobile increased significantly since 2009 (up from 59%, 71% and 71% respectively), with a decline in neutral ratings for 3 and Orange.

Satisfaction was typically higher than in the landline and broadband sectors. No providers were significantly different to the average for the sector.

Figure 4.7: Mobile – Overall satisfaction by provider



Q1: Overall how satisfied are you with [PROVIDER] as your provider of [SERVICE]?

Base: All UK households contacting mobile phone provider: 3 200, O2 491, Orange 429, T-Mobile 302, Virgin 171, Vodafone 402.

/ indicates significantly higher/ lower than overall (99% test).

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

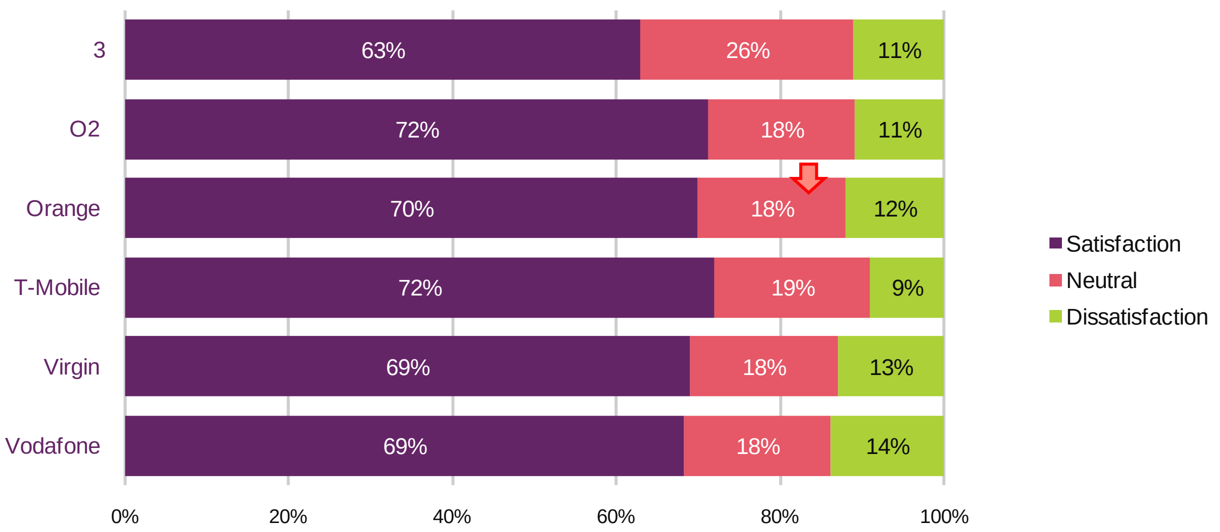
Overall satisfaction with customer service by provider

Figure 4.8 (below) shows levels of satisfaction with the customer service of mobile phone providers.

Neutral ratings of Orange satisfaction declined since 2009 (from 26%), with ratings becoming slightly more polarised. There were no other significant shifts from 2009.

As for overall satisfaction, no providers were significantly different to the average in terms of customer service satisfaction.

Figure 4.8: Mobile – Overall satisfaction with customer service by provider



Q3: Overall how satisfied are you with the service you received from [PROVIDER] customer services on this occasion?

Base: All UK households contacting mobile phone provider: 3 200, O2 491, Orange 429, T-Mobile 302, Virgin 171, Vodafone 402.

/ indicates significantly higher/ lower than overall (99% test).

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

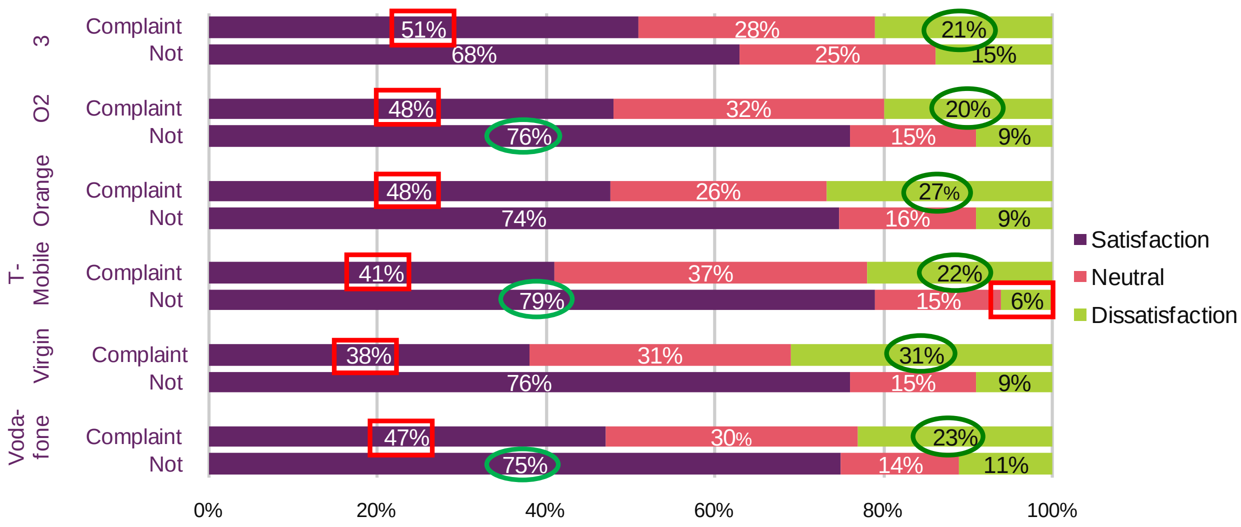
Satisfaction with customer service, by whether contact was a complaint

Figure 4.9 (below) shows the level of satisfaction with customer service from mobile phone providers split by whether or not the contact was a complaint.

As with other sectors, satisfaction for all providers was lower when the contact was considered to be a complaint. Satisfaction with non-complaint contacts to O2, T-Mobile and Vodafone was above average.

NB: The question to determine complaints was not asked in 2009.

Figure 4.9: Mobile - Satisfaction with customer service by complaint or not



Q3: Overall how satisfied are you with the service you received from [PROVIDER] customer services on this occasion?

Base All UK households contacting mobile phone provider (Complaint/Not): 3 54/146, O2 89/402, Orange 77/352, T-Mobile 65/237, Virgin 37*/134, Vodafone 99/303.

/ indicates significantly higher/ lower than overall (99% test).

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Satisfaction with ease of contacting customer service

Figure 4.10 (below) shows mean satisfaction scores on various aspects of contacting customer service.

Orange, T-Mobile and Vodafone improved their ratings since 2009 on ease of finding contact details (from 7.0, 7.6 and 7.1 respectively), while O2, Orange, T-Mobile and Vodafone improved in terms of calling back (from 6.6, 6.2, 6.2 and 6.0 respectively) and ease of getting through to the right person (from 7.0, 6.4, 6.7 and 6.4 respectively).

T-Mobile was rated above average on ease of finding contact details.

Figure 4.10: Mobile – Satisfaction with ease of contacting customer service

	3	O2	Orange	T-Mobile	Virgin	Vodafone
Ease of finding provider contact details	7.6	7.8	7.8 ⇧	8.1 ⇧	7.7	7.6 ⇧
Calling you back when they said they would	6.9	7.1 ⇧	6.7 ⇧	7.3 ⇧	6.6	6.8 ⇧
Ease of getting through to the right person *(phone only)*	7.0	7.5 ⇧	7.2 ⇧	7.3 ⇧	6.8	7.3 ⇧

Q4: How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied.

Base: All UK households contacting mobile phone provider: 3 200, O2 491, Orange 429, T-Mobile 302, Virgin 171, Vodafone 402.

⬭ / ▭ indicates significantly higher/ lower than overall (99% test).

⇧ / ⇩ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Satisfaction with speed of customer service

Figure 4.11 (below) shows mean satisfaction scores on various aspects to do with the speed of customer service.

There was improvement for O2, Orange, T-Mobile and Vodafone since 2009 on speed of answering phones (from 6.8, 6.3, 6.6 and 6.5 respectively) and time taken to handle issue (from 7.0, 6.6, 6.7 and 6.6 respectively).

Virgin was rated below average on speed of answering phones..

Figure 4.11: Mobile – Satisfaction with the speed of customer service

	3	O2	Orange	T-Mobile	Virgin	Vodafone
Speed of answering phones *(phone only)*	7.1	7.4 ⇧	7.0 ⇧	7.4 ⇧	$\boxed{6.6}$	7.3 ⇧
The time taken to handle issue	6.8	7.4 ⇧	7.3 ⇧	7.6 ⇧	6.8	7.1 ⇧

Q4: How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied.

Base: All UK households contacting mobile phone provider: 3 200, O2 491, Orange 429, T-Mobile 302, Virgin 171, Vodafone 402.

/ indicates significantly higher/ lower than overall (99% test).

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Satisfaction with customer service advice

Figure 4.12 (below) shows mean satisfaction scores for the standard of advice from customer service.

Orange and T-Mobile customer service ratings improved significantly from 2009 on advice being easy to understand (from 7.1 and 7.0 respectively), useful (from 6.9 and 6.8 respectively), and issue resolution (from 6.8 and 6.7 respectively). Vodafone improved on giving useful advice (up from 6.8).

3 was rated below average on giving advice that was easy to understand.

Figure 4.12: Mobile – Satisfaction with the standard of advice from customer service

	3	O2	Orange	T-Mobile	Virgin	Vodafone
Advice/information was easy to understand	6.8	7.6	7.6	7.8	7.2	7.4
Advice/information was useful	6.9	7.4	7.5	7.7	7.2	7.3
Getting the issue resolved to your satisfaction	6.7	7.3	7.3	7.7	7.1	7.1

Q4: How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied.

Base: All UK households contacting mobile phone provider: 3 200, O2 491, Orange 429, T-Mobile 302, Virgin 171, Vodafone 402.

/ indicates significantly higher/ lower than overall (99% test).

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Satisfaction with customer service adviser

Figure 4.13 (below) shows mean satisfaction with the customer service adviser.

There was significant improvement since 2009 for O2, Orange and Vodafone on courtesy (up from 7.7, 7.5 and 7.5 respectively), and O2, Orange, T-Mobile and Vodafone on taking questions seriously (from 7.4, 7.2, 7.4 and 7.1 respectively), keeping the customer informed (from 7.1, 7.0, 7.1 and 6.8 respectively), and logging details (from 6.8, 6.7, 6.7 and 6.5 respectively). Orange and T-Mobile also improved on understanding the issue (from 7.0 and 7.2 respectively) and doing what they said (from 7.0 and 7.3 respectively).

3 was rated below average on adviser ability to understand the issue.

Figure 4.13: Mobile – Satisfaction with the adviser of customer service

	3	O2	Orange	T-Mobile	Virgin	Vodafone
Courtesy and politeness of advisers	7.8	8.1	8.1	8.1	8.0	8.0
Adviser ability to understand the issue and identify the problem	6.9	7.6	7.6	7.8	7.3	7.4
Adviser took my questions/issue seriously	7.4	7.8	7.8	8.0	7.6	7.6
Keeping you informed throughout the process	7.3	7.6	7.6	7.8	7.3	7.4
Adviser doing what they say they would do	7.2	7.6	7.7	7.9	7.4	7.4
Logging of query details to avoid having to repeat yourself	6.7	7.3	7.3	7.5	6.9	7.1

Q4: How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied.

Base: All UK households contacting mobile phone provider: 3 200, O2 491, Orange 429, T-Mobile 302, Virgin 171, Vodafone 402.

/ indicates significantly higher/ lower than overall (99% test).

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Satisfaction with other aspects of customer service

Figure 4.14 (below) shows mean satisfaction scores for more general customer service attributes.

Orange and T-Mobile improved their ratings since 2009 on offering payment (both from 5.2) and willingness to help (both up from 7.2). Vodafone also improved on offering compensation (up from 5.2).

No mobile providers were rated above or below average on either of these aspects.

Figure 4.14: Mobile – Satisfaction with other aspects of customer service

	3	O2	Orange	T-Mobile	Virgin	Vodafone
Offering compensation or a goodwill payment	5.5	6.1	5.9 ⇧	6.2 ⇧	5.6	5.9 ⇧
Willingness to help resolve your issue	7.3	7.6	7.7 ⇧	7.9 ⇧	7.6	7.5

Q4: How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied.

Base: All UK households contacting mobile phone provider: 3 200, O2 491, Orange 429, T-Mobile 302, Virgin 171, Vodafone 402.

○ / □ indicates significantly higher/ lower than overall (99% test).

⇧ / ⇩ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

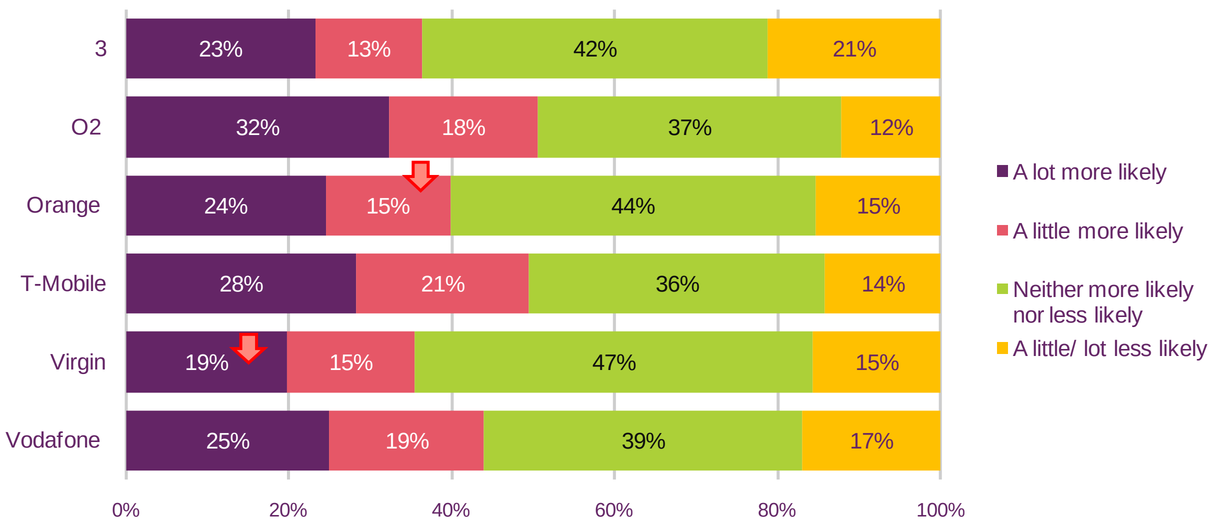
Future use of provider given customer service experience

Figure 4.15 (below) shows the likelihood of using each mobile provider in the future, in light of the customer service experience during the most recent contact.

Unlike many of the other mobile phone providers, ratings of different aspects of Virgin's customer service have not improved since 2009, and this may be reflected in the drop in the proportion of customers claiming to be a lot more likely to use them in future (down from 36%).

There was no difference by provider in claimed loyalty.

Figure 4.15: Mobile – Future use of provider given customer service experience



Q7: Has the experience of [PROVIDER]'s customer service for this issue made you more likely or less likely to use [PROVIDER] in the future?

Base: All UK households contacting mobile phone provider: 3 200, O2 491, Orange 429, T-Mobile 302, Virgin 171, Vodafone 402.

/ indicates significantly higher/ lower than overall (99% test).

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Pay TV sector

This section looks specifically at the pay TV sector, in terms of service providers contacted, issue type, issue resolution, number of contacts, satisfaction and impact on future use.

Executive Summary

- Contact frequency in the sector is similar to in 2009, with just under a quarter of customers having contacted their provider recently.

- The key reasons for contact are changing package or service, and arranging an engineer's visit; billing issues are less common in this sector. Issues are mostly resolved, with general issues most likely to be fully resolved.

- Overall satisfaction with Sky, and Sky advisors, has increased across the board since 2009. Dissatisfaction with Virgin customer service has increased since 2009, and Virgin advisers are generally rated below average for the sector.

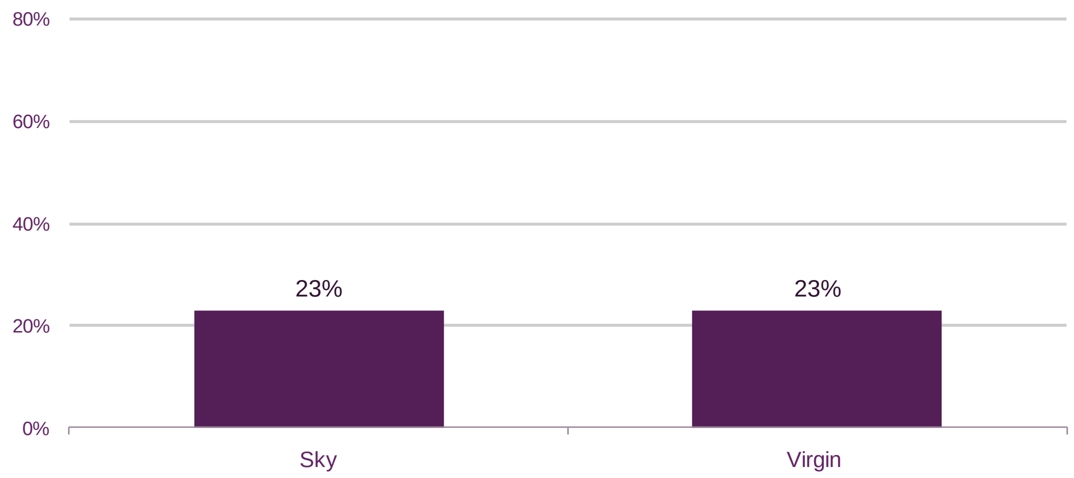
- To date the improvement in Sky customer service has not had a significant effect on customer loyalty for this provider, but claimed future use of Virgin has declined a little.

Recent contact with provider

Figure 5.1 (below) shows the proportion of customers of different pay TV providers who had contacted that provider in the last three months.

There was no significant change since 2009, and neither provider was different from the average in terms of the proportion of customers contacting recently.

Figure 5.1: Pay TV – Proportion of customers who have contacted their pay TV provider about an issue in the last three months



Q6: Thinking of [PROVIDER] and the services you buy from them, have you contacted them in the last 3 months by phone/ email?

Base: All UK households using pay TV providers: Sky 1,118, Virgin 437.

/ indicates significantly higher/ lower than overall (99% test).

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: GfK Omnibus Survey

Proportion of complaints

Figure 5.2 (below) shows the proportion of recent contacts that were considered (by customers) to be complaints.

Neither provider was significantly different to the average in terms of the proportion of complaints..

NB: This question was not asked in 2009.

Figure 5.2: Pay TV – Whether recent contact was regarding a complaint

Q5a: And in your opinion, was the reason for this contact with [PROVIDER] a complaint, or something else?

Base: All UK households contacting pay TV provider: Sky 958, Virgin 518.

/ indicates significantly higher/ lower than overall (99% test).

Source: Online survey

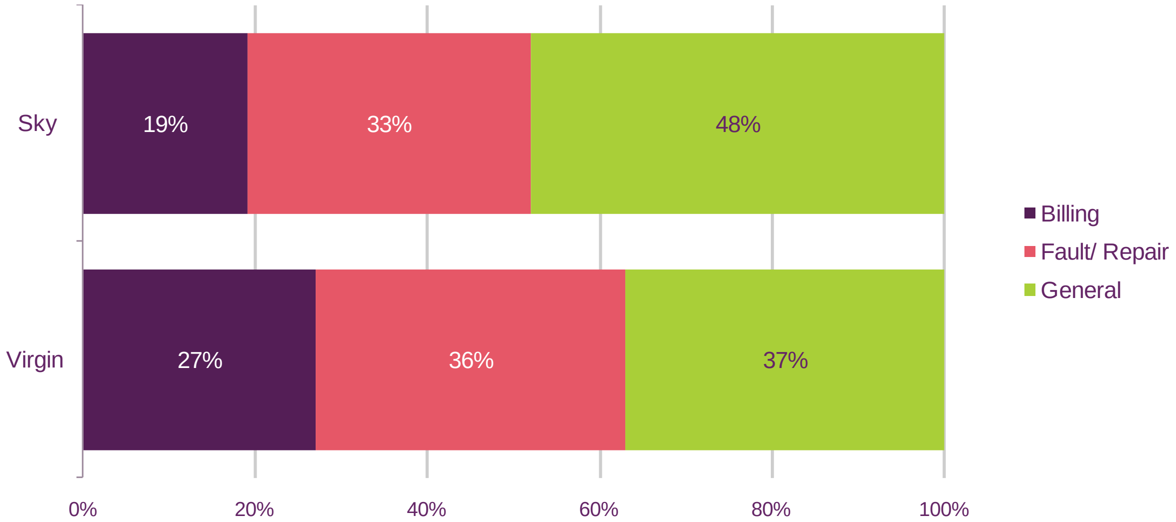
Type of call made most recently to service provider

Figure 5.3 (below) shows the type of call made to pay TV providers.

There was no change in call type by provider compared with 2009.

Billing enquiries were less common than faults or general enquiries. Neither provider was significantly different to the average for the sector.

Figure 5.3: Pay TV – Type of call made most recently with pay TV provider



Q8: Thinking of the most recent issue you had to contact [PROVIDER] about, which of the following categories did the issue fall into?

Base: All UK households contacting pay TV provider: Sky 252, Virgin 102.

/ indicates significantly higher/ lower than overall (99% test).

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: GfK Omnibus Survey

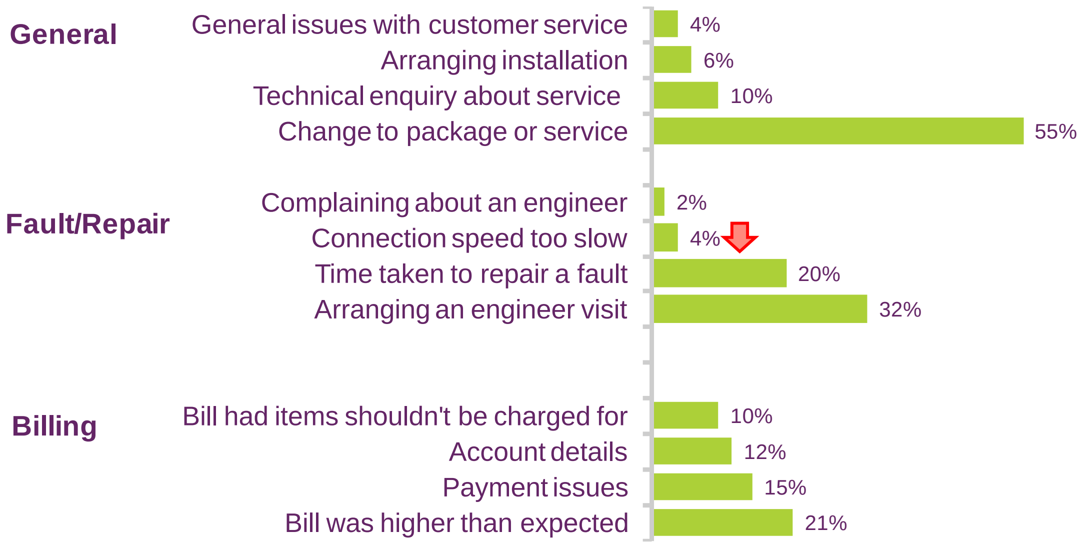
Key issues by contact type

Figure 5.4 (below) shows – for each of the three main types of issue – the most common specific reasons for recent contact with pay TV service providers. NB: the results are shown as a proportion of each type of call by supplier (general, fault/repair or billing) as shown in Figure 5.3. E.g. calls regarding 'bill had items shouldn't be charged for' accounted for 10% of contacts about billing issues.

There was a drop since 2009 in the proportion of fault/ repair contacts regarding slow connection speed (down from 8% of contacts about fault/repairs in 2009).

By far the main reason for contacting pay TV providers was to change package or service. Next most typical reasons for contact were to arrange an engineer visit or to discuss the time taken to repair a fault.

Figure 5.4: Pay TV - Top four issues per contact type



S7: Which of the following best describes what the issue with [PROVIDER] was concerning?

Base: All UK households contacting pay TV provider: Billing 472, Fault 459, General 545

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

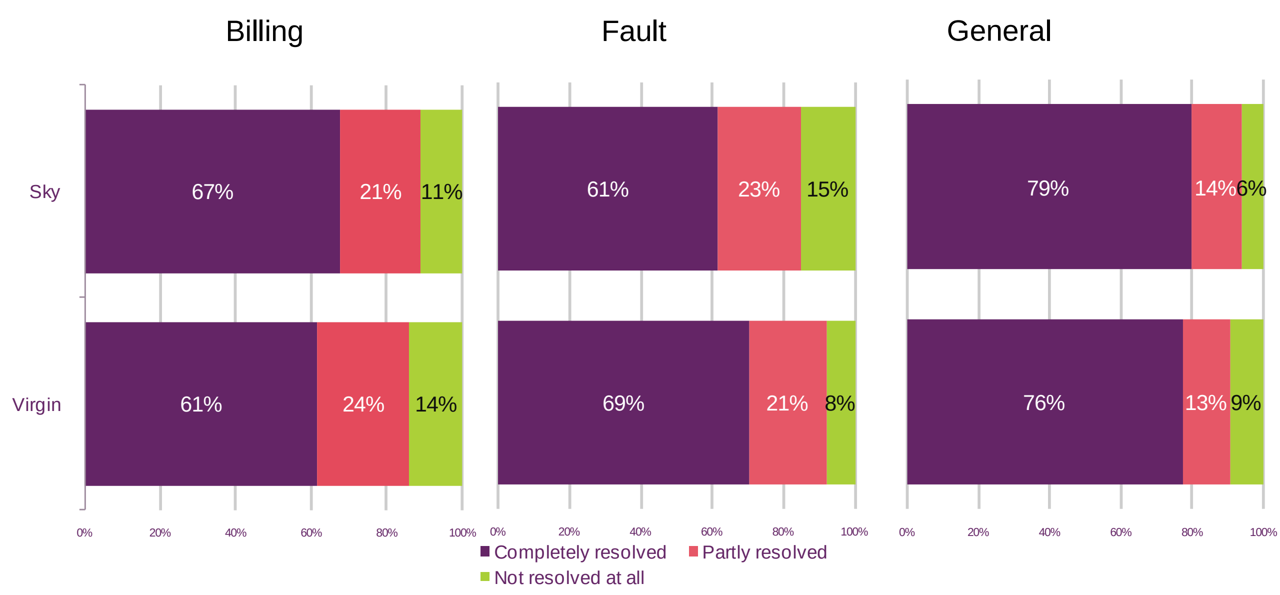
Issue resolution by service provider

Figure 5.5 (below) shows the degree of issue resolution by pay TV providers (as perceived by the customer).

There were no significant changes in issue resolution since 2009.

Neither provider was different from the average in terms of resolution levels by issue type.

Figure 5.5: Pay TV – Whether issue is seen as 'resolved'



Q5: In your opinion, was [PROVIDER] able to successfully resolve your issue? [Billing/Faults/General]

Base: All UK households contacting pay TV provider: Sky 315/269/374, Virgin 157/190/171.

/ indicates significantly higher/ lower than overall (99% test).

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

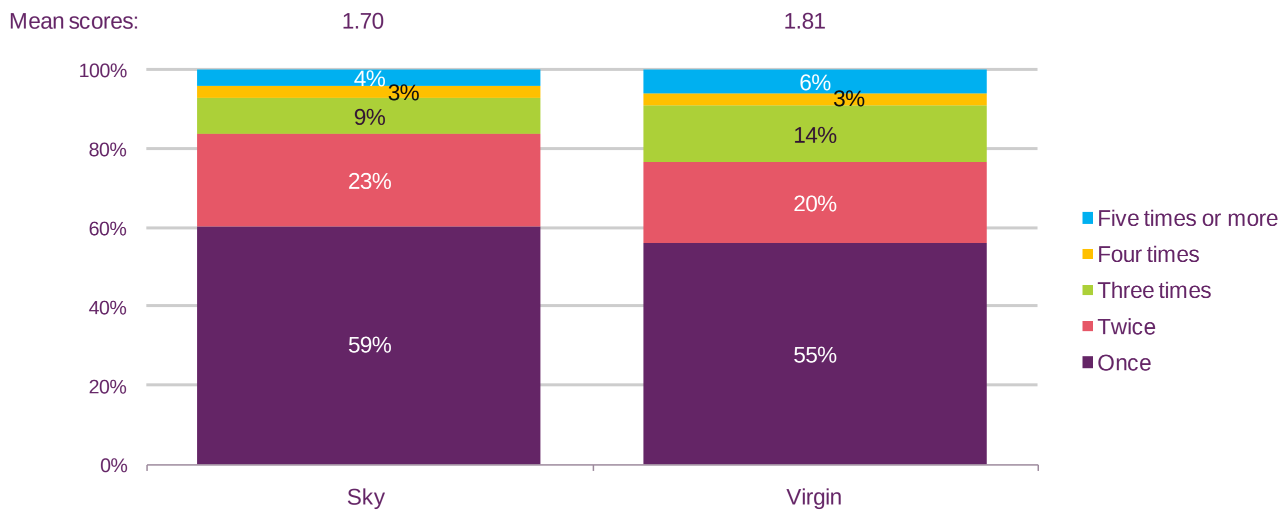
Number of contacts made with service provider

Figure 5.6 (below) shows the number of times customers contacted their pay TV provider regarding their most recent issue.

There were no significant changes since 2009.

As in the mobile phone sector, pay TV customers generally required fewer contacts with their provider compared with landline or broadband customers. Neither provider was significantly different from the average in terms of number of contacts needed to resolve the issue.

Figure 5.6: Pay TV – Number of contacts made, by provider



Q6: How many times have you been in contact with [PROVIDER] in relation to this particular issue so far?

Base: All UK households contacting pay TV provider: Sky 958, Virgin 518.

/ indicates significantly higher/ lower than overall (99% test).

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

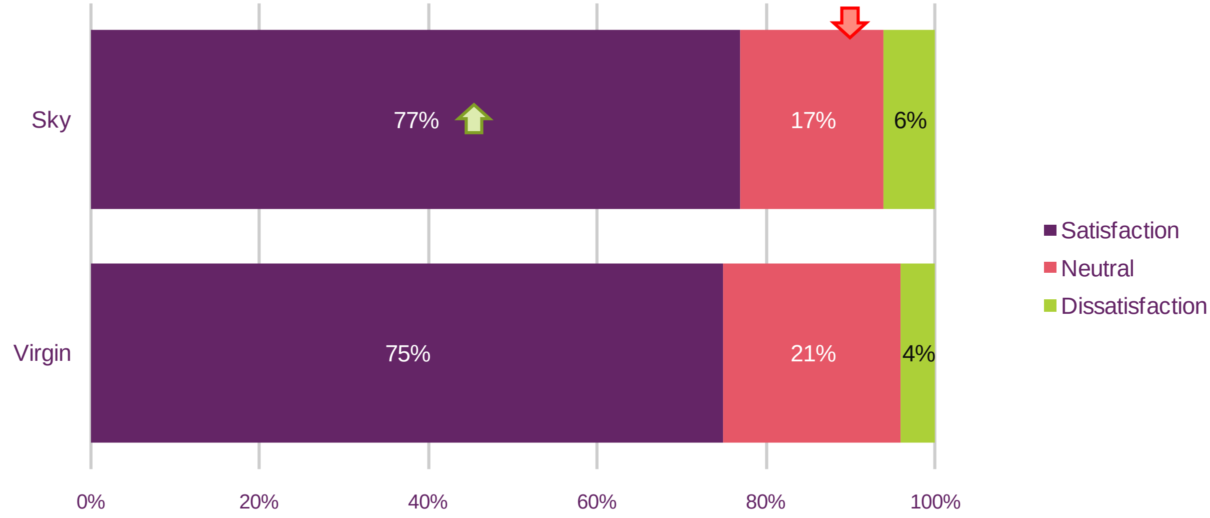
Overall satisfaction by provider

Figure 5.7 (below) shows levels of overall satisfaction with pay TV providers.

There was an increase in overall satisfaction with Sky since 2009 (from 72%)

Around three quarters of customers were satisfied with their provider. The two providers were rated similarly on this measure.

Figure 5.7: Pay TV – Overall satisfaction by provider



Q1: Overall how satisfied are you with [PROVIDER] as your provider of [SERVICE] on a 1 to 10 scale?

Base: All UK households contacting pay TV provider: Sky 958, Virgin 518.

/ indicates significantly higher/ lower than overall (99% test).

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

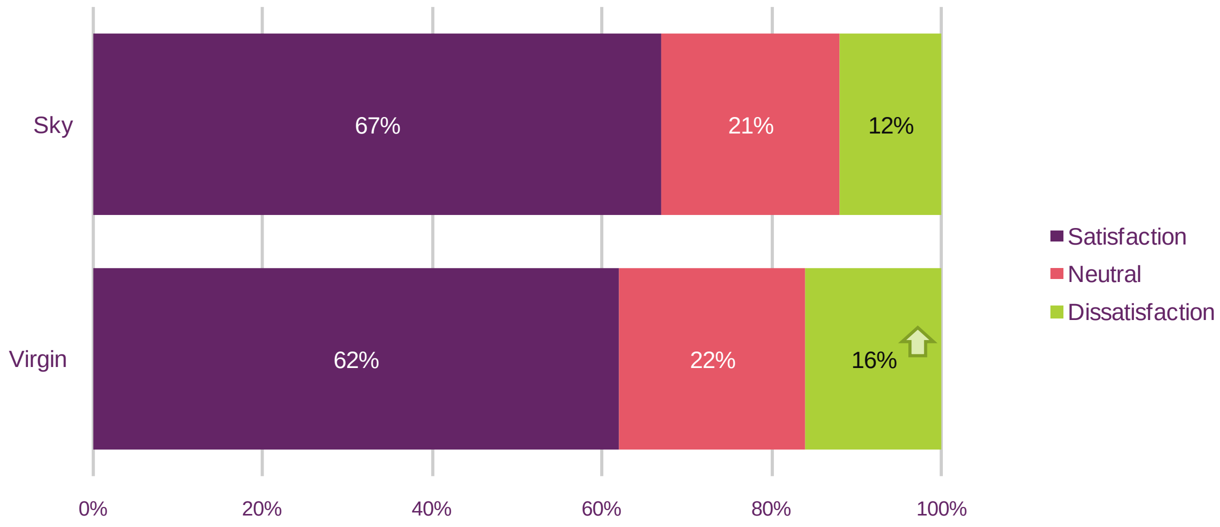
Overall satisfaction with customer service by provider

Figure 5.8 (below) shows levels of satisfaction with the customer service of pay TV providers.

Dissatisfaction with Virgin has increased significantly since 2009 (from 10%).

Neither provider was significantly different to the average for the sector.

Figure 5.8: Pay TV – Overall satisfaction with customer service by provider



Q3: Overall how satisfied are you with the service you received from [PROVIDER] customer services on this occasion?

Base: All UK households contacting pay TV provider: Sky 958, Virgin 518.

/ indicates significantly higher/ lower than overall (99% test).

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

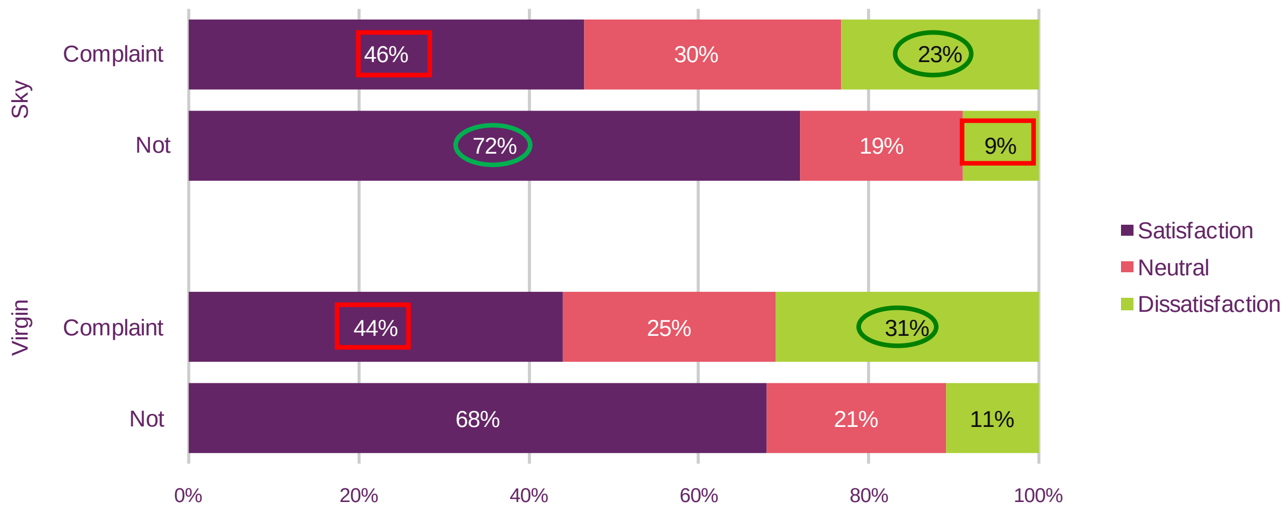
Satisfaction with customer service, by whether contact was a complaint

Figure 5.9 (below) shows the level of satisfaction with customer service from pay TV providers, split by whether or not the contact was a complaint.

As with other sectors, satisfaction for both providers was higher when the contact was not considered to be a complaint. Satisfaction with Sky for non-complaint contacts was above average.

NB: The question to determine complaints was not asked in 2009.

Figure 5.9: Pay TV - Satisfaction with customer service by complaint or not



Q3: Overall how satisfied are you with the service you received from [PROVIDER] customer services on this occasion?

Base: All UK households contacting pay TV provider (Complaint/Not): Sky 196/762, Virgin 137/381.

/ indicates significantly higher/ lower than overall (99% test).

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Satisfaction with ease of contacting customer service

Figure 5.10 (below) shows mean satisfaction scores on various aspects of contacting customer service.

Sky ratings have improved since 2009 on ease of finding contact details (up from 6.6), calling back (from 5.9) and ease of getting through to the right person (from 6.0). Virgin also improved its rating on calling back (from 6.1).

Virgin was rated above average in terms of ease of finding contact details.

Figure 5.10: Pay TV – Satisfaction with ease of contacting customer service

	Sky	Virgin
Ease of finding provider contact details	7.3 ⇧	7.8
Calling you back when they said they would	7.0 ⇧	6.8 ⇧
Ease of getting through to the right person *(phone only)*	6.8 ⇧	6.9

Q4: How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied.

Base: All UK households contacting pay TV provider: Sky 958, Virgin 518.

/ indicates significantly higher/ lower than overall (99% test).

⇧ / ⇩ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Satisfaction with speed of customer service

Figure 5.11 (below) shows mean satisfaction scores on various aspects to do with the speed of customer service.

Both Sky and Virgin improved since 2009 on speed of answering phones (up from 5.9 and 6.3 respectively), and Sky also improved on time taken to handle issue (from 6.4).

Neither provider was significantly different to the average in these areas.

Figure 5.11: Pay TV – Satisfaction with the speed of customer service

	Sky	Virgin
Speed of answering phones *(phone only)*	6.7 ⇧	6.8 ⇧
The time taken to handle issue	7.0 ⇧	6.8

Q4: How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied.

Base: All UK households contacting pay TV provider: Sky 958, Virgin 518.

/ indicates significantly higher/ lower than overall (99% test).

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Satisfaction with customer service advice

Figure 5.12 (below) shows mean satisfaction scores for the standard of advice from customer service.

Sky improved its ratings since 2009 on advice being easy to understand (from 6.9) and useful (from 6.7) and on getting the issue resolved (from 6.7).

Virgin was rated below average on giving advice that was easy to understand.

Figure 5.12: Pay TV - Satisfaction with the standard of advice from customer service

	Sky	Virgin
Advice/information was easy to understand	7.6 ⇧	7.1
Advice/information was useful	7.3 ⇧	7.0
Getting the issue resolved to your satisfaction	7.3 ⇧	6.9

Q4: How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied.

Base: All UK households contacting pay TV provider: Sky 958, Virgin 518.

/ indicates significantly higher/ lower than overall (99% test).

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Satisfaction with customer service adviser

Figure 5.13 (below) shows mean satisfaction with the customer service adviser.

Sky's ratings improved since 2009 in terms of courtesy (from 7.4), understanding the issue (from 6.9), taking the issue seriously (from 7.1), keeping the customer informed (from 6.8), doing what they said (from 7.0) and logging details (from 6.5).

Virgin advisers were rated significantly below average for the pay TV sector on all aspects apart from courtesy.

Figure 5.13: Pay TV – Satisfaction with the adviser of customer service

	Sky	Virgin
Courtesy and politeness of advisers	8.1 ⇧	7.8
Adviser ability to understand the issue and identify the problem	7.6 ⇧	$\boxed{7.0}$
Adviser took my questions/issue seriously	7.9 ⇧	$\boxed{7.4}$
Keeping you informed throughout the process	7.6 ⇧	$\boxed{7.0}$
Adviser doing what they say they would do	7.7 ⇧	$\boxed{7.3}$
Logging of query details to avoid having to repeat yourself	7.2 ⇧	$\boxed{6.7}$

Q4: How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied.

Base: All UK households contacting pay TV provider: Sky 958, Virgin 518.

/ indicates significantly higher/ lower than overall (99% test).

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Satisfaction with other aspects of customer service

Figure 5.14 (below) shows mean satisfaction scores for more general customer service attributes.

Sky improved its ratings since 2009 on offering compensation (up from 5.0) and willingness to help (from 6.9).

Virgin was rated below average in terms of willingness to help.

Figure 5.14: Pay TV – Satisfaction with other aspects of customer service

	Sky	Virgin
Offering compensation or a goodwill payment	5.9 ⇧	5.7
Willingness to help resolve your issue	7.6 ⇧	$\boxed{7.1}$

Q4: How satisfied were you with the following aspects of your provider's customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied.

Base: All UK households contacting pay TV provider: Sky 958, Virgin 518.

/ indicates significantly higher/ lower than overall (99% test).

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

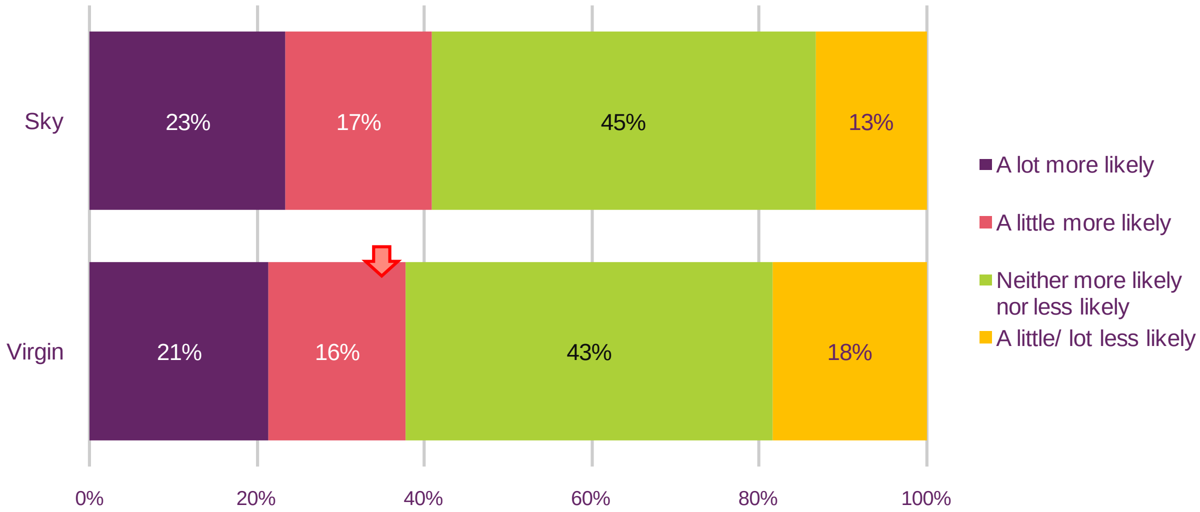
Future use of provider given customer service experience

Figure 5.15 (below) shows the likelihood of using each pay TV provider in the future, in light of the customer service experience during the most recent contact.

There has been a decline since 2009 in the proportion of Virgin customers saying they were a little more likely to use this provider in the future (down from 21%).

Neither provider was rated significantly different to the sector average in terms of claimed likelihood to use in the future.

Figure 5.15: Pay TV – Future use of provider given customer service experience



Q7: Has the experience of [PROVIDER]'s customer service for this issue made you more likely or less likely to use [PROVIDER] in the future?

Base: All UK households contacting pay TV provider: Sky 958, Virgin 518.

/ indicates significantly higher/ lower than overall (99% test).

/ indicates significant increase/ decrease versus previous wave (99% test).

Source: Online survey

Appendix 1: Final Questionnaire

Screener

ASK ALL / SINGLE CODE
S1 Standard panel question to record exact age

CLOSE IF UNDER 18

ASK ALL / SINGLE CODE
S2 Standard panel question to record gender

ASK ALL / SINGLE CODE PER PROVIDER
S3 Which company does your household use for the following services, if any?

A. Landline telephone calls
B. Broadband internet (HOVER-OVER TEXT: This refers to broadband delivered via your household landline, NOT via a dongle or a 3G connection from a mobile operator)
C. Cable/ Satellite TV

And thinking of your personal mobile phone (so not one that might be provided by your work), which network are you on? If you use more than one mobile network, please select the one you use most for personal calls.

D. Personal mobile phone (HOVER-OVER TEXT: This refers to the network you use for mobile voice and SMS (not networks which are purely used for mobile broadband access)

CLOSE IF ‘OTHER’ OR ‘DO NOT USE’ CODED FOR EVERY SERVICE

ASK ALL USING AT LEAST ONE ELIGIBLE PROVIDER / SINGLE CODE
S4 Thinking of [PROVIDER] and the services you buy from them, have you contacted them in the last 3 months by telephone or email?

REPEAT FOR ALL ELIGIBLE PROVIDERS IN A LOOP USING AT S3, ASK ONLY ONCE FOR EACH PROVIDER, EVEN IF USE MORE THAN ONE SERVICE FROM THEM

1. Yes
2. No

IF S4= 2 (NO) FOR ALL PROVIDERS SCREEN OUT

ASK IF USE ANY PROVIDER FOR MORE THAN ONE SERVICE AT S3, AND HAVE CONTACTED THEM AT S4 / MULTICODE
S5 Thinking of the most recent issue that you had to contact [PROVIDER] about, which of the services that you buy from them was it relating to?
Please tick all that apply.

SHOW ONLY SERVICES BEING USED BY THE RESPONDENT

1. Landline telephone calls
2. Broadband internet
3. Cable/ Satellite TV
4. Mobile phone services (not including mobile broadband)

ASK FOR ALL PROVIDERS CONTACTED (S4=1). IF NO PROVIDERS CONTACTED (S4=1), CLOSE / SINGLE CODE

S6 And thinking of the most recent issue that you had to contact [PROVIDER] about, which of the following categories did the issue fall into?

ROTATE ORDER OF OPTIONS, WITH THE EXCEPTION OF CODE 7, WHICH IS ALWAYS THE LAST

1. A billing, pricing or payment issue
2. A problem with your account details, for example name and address etc.
3. A fault with the service you are buying from them, for example total or partial failure of service
4. The service not performing as well as expected, for example issues with picture quality, broadband speed, mobile coverage etc.
5. Problems with the repair service, for example it didn't happen or didn't solve the problem
6. A problem relating to the installation or set up of your service
7. Or something else, a general issue

ASK FOR ALL PROVIDERS CONTACTED (S4=1) / SINGLE CODE

S7 (A-C) And more specifically, which of the following best describes what the issue with [PROVIDER] was concerning?

ROTATE CODES WITHIN EACH HEADING, EXCEPT FOR 'A DIFFERENT ISSUE' WHICH IS ALWAYS LAST
RESPONDENT IS ONLY SHOWN CODES RELATING TO THE SERVICE THEY USE THE PROVIDER FOR, OR IF CALL WAS RELATING TO MULTIPLE SERVICES, THEN FOR ALL THOSE SERVICES.
CODES ARE RELEVANT TO ALL SERVICES UNLESS MARKED SPECIFICALLY IN BRACKETS AFTERWARDS.

A. Billing (USE THIS LIST IF CODES 1 OR 2 AT S6)
1. Bill was inaccurate
2. Bill contained items I shouldn't have been charged for
3. Pre-pay credit lost or not credited to card (MOBILE)
4. Costs of international and roaming calls (MOBILE)
5. Needed help to understand the bill
6. Bill was a lot higher than expected
7. The format of the bill
8. Payment issues (including setting up/making a payment, non-direct debit charges)
9. Account details (name, address, tariff, package etc.)
10. Getting a refund, credit note or cashback
11. A different issue (please describe it briefly in your own words) _____

B. Faults and repairs (USE THIS LIST IF CODES 3,4,5 AT S6)
1. Poor line quality (LANDLINE)
2. Poor reception/coverage (MOBILE)
3. Text or voice mails delivered late (MOBILE)
4. Problems with calls being disconnected during a call or not connected at all (MOBILE)
5. Arranging an appointment for an engineer visit (LANDLINE/BROADBAND/PAY TV)
6. Complaining about an engineer (LANDLINE/BROADBAND/PAY TV)
7. Time taken to repair a fault
8. Connection speed too slow (BROADBAND)
9. Problems with voice over internet (VOIP) telephone calls (BROADBAND)
10. A different issue (please describe it briefly in your own words) _____

C. General enquiries (USE THIS LIST IF CODE 6 & 7 AT S6)

1. Mis-selling
2. Keeping your mobile phone number when changing suppliers (MOBILE)
3. Time taken to install the service (LANDLINE/BROADBAND/PAY TV)
4. Damage to property during installation or repair (LANDLINE/BORADBAND/PAY TV)
5. Unsolicited contacts (e.g. sales and marketing calls or faxes, emails/spam, scams), (MOBILE/LANDLINE/BROADBAND)
6. Enquiring or complaining about the terms of your contract
7. General issues with customer service
8. Arranging an installation (LANDLINE/BROADBAND/PAY TV)
9. Buying your service
10. Change to your package or service (upgrading or downgrading your service)
11. Technical enquiry about the service
12. Enquiring about usage levels (hours/amount downloaded) and quotas/caps on usage (MOBILE/BROADBAND/LANDLINE)
13. Switching issues (e.g. problems trying to switch or switched without permission)
14. A different issue (please describe it briefly in your own words) _____

Service Satisfaction

ASK FOR ALL PROVIDERS CONTACTED AT S4, AND SEPARATELY FOR EACH SERVICE USED (SO MULTIPLE TIMES FOR BUNDLED PROVIDERS) / SINGLE CODE

Q1 Overall how satisfied would you say you are with [PROVIDER] as your provider of [SERVICE] on a 1 to 10 scale where 10 means you are extremely satisfied, and 1 means you are extremely dissatisfied?

10 – Extremely satisfied
9
8
7
6
5
4
3
2
1 – Extremely dissatisfied

ASK ALL – ONLY ONCE PER PROVIDER CONTACTED, REGARDLESS OF BUNDLING / SINGLE CODE

Q2 We're now going to concentrate on the most recent issue that you had to contact [PROVIDER] about. In dealing with [PROVIDER] about this did you contact them only on the phone, mainly on the phone, only via email or mainly via email?

1. Only on the phone
2. Mainly on the phone
3. Only via email
4. Mainly via email
5. Don't Know

ASK ALL – ONLY ONCE PER PROVIDER CONTACTED, REGARDLESS OF BUNDLING / SINGLE CODE

Q3 Overall, how satisfied are you with the service you received from [PROVIDER] customer services on this occasion?

Please give your rating on a scale from ‘1’ to ‘10’, where ‘10’ means that you are extremely satisfied and ‘1’ means you are extremely dissatisfied?

1. Extremely dissatisfied
2.
3.
4.
5.
6.
7.
8.
9.
10. Extremely satisfied

ASK ALL – ONLY ONCE PER PROVIDER CONTACTED, REGARDLESS OF BUNDLING / SINGLE CODE

Q4 And how satisfied were you with the following aspects of your provider’s customer service? Please rate each on a 10 point scale where 10 means that you were extremely satisfied, and 1 means that you were extremely dissatisfied.

NB: If a statement does not apply to the contact you made, please select, ‘Not applicable’
RANDOMISE WITHIN EACH HEADING.

SCREEN 1:
Contacting…
A. Ease of finding provider contact details
B. Calling back when they said they would
C. Ease of getting through to the right person (PHONE)

Speed…
D. Speed of answering phones (PHONE)
E. The time taken to handle your issue

Standard of advice…
F. Advice/information was easy to understand
G. Advice/information was useful
H. Getting the issue resolved to your satisfaction

SCREEN 2:
Adviser…
I. Courtesy and politeness of advisers
J. Adviser ability to understand the issue and identify the problem
K. Adviser took my question/issue seriously
L. Keeping you informed throughout the process
M. Adviser doing what they said they would do
N. Logging of query details to avoid having to repeat yourself

General…
O. Offering compensation or a goodwill payment
P. Willingness to help resolve your issue

ASK ALL – ONLY ONCE PER PROVIDER CONTACTED, REGARDLESS OF BUNDLING / SINGLE CODE

Q5 In your opinion, was [PROVIDER] able to successfully resolve your issue?

1. Completely resolved
2. Partly resolved
3. Not resolved at all
4. Don't know

ASK ALL – ONLY ONCE PER PROVIDER CONTACTED, REGARDLESS OF BUNDLING / SINGLE CODE

Q5a And in your opinion, was the reason for this contact with [PROVIDER] a complaint, or something else?

1. Complaint
2. Something else
3. Don't know

ASK ALL – ONLY ONCE PER PROVIDER CONTACTED, REGARDLESS OF BUNDLING / SINGLE CODE

Q6 How many times have you been in contact with [PROVIDER] in relation to this particular issue so far? Please take your best guess if you cannot remember exactly how many this is.

1. Once
2. Twice
3. Three times
4. Four times
5. Five times or more
6. Don't know

ASK ALL – ONLY ONCE PER PROVIDER CONTACTED, REGARDLESS OF BUNDLING / SINGLE CODE

Q7 Has your experience of [PROVIDER]'s customer service for this issue made you more or less likely to use [PROVIDER] in the future?

1. A lot more likely
2. A little more likely
3. Neither more nor less likely
4. A little less likely
5. A lot less likely
6. Don't know

ASK ALL – ONLY ONCE PER PROVIDER CONTACTED, REGARDLESS OF BUNDLING / SINGLE CODE

Q8 If you were provided with customer service ratings for different companies, so that you could distinguish between good and bad performance …Which of the following statements do you think would best describe your attitude to that information if you were thinking about changing from [PROVIDER] to an alternative provider?

1. I would not pay much or any attention to it
2. I would look at it but would not choose a provider based on it
3. I would look at it and bear it in mind when choosing a provider
4. I would look at it and it would be an important part in helping me to choose a provider
5. Don't Know

Classification

ASK ALL MOBILE OWNERS WHO HAVE ANSWERED ABOUT A CUSTOMER SERVICE EVENT FOR AN ELGIIBLE MOBILE NETWORK AT S3D / SINGLE CODE

CL1 Is your personal mobile phone on a contract or pay as you go?

1. Contract (with monthly bills)
2. Pay as you go
3. Don't know

ASK ALL / SINGLE CODE

CL2 What is your current employment status?

1. Employed or self-employed (full-time)
2. Employed or self-employed (part-time)
3. Homemaker
4. Student / under education
5. Temporarily not working (unemployed / illness)
6. Retired

ASK ALL / SINGLE CODE

CL3 Approximately, what is your total annual income before tax?

1. Under £5,000
2. £5,000 to £9,999
3. £10,000 to £19,999
4. £20,000 to £29,999
5. £30,000 to £39,999
6. £40,000 to £49,999
7. £50,000 to £59,999
8. £60,000 or more
9. Don't know
10. Would rather not say

ASK ALL / SINGLE CODE

CL4 Where do you live?

1. East Midlands
2. Eastern
3. London
4. North East
5. North West
6. Scotland
7. South East
8. South West
9. Ulster / Northern Ireland
10. Wales
11. West Midlands
12. Yorks & Humber

ASK ALL / MULTI-CODE

CL5 And finally, which of these, if any, limit your daily activities or the work you can do?

Please select all that apply

1. Breathlessness or chest pains
2. Poor vision, partial sight or blindness
3. Difficulty in speaking or in communicating
4. Poor hearing, partial hearing or deafness
5. Cannot walk at all / use a wheelchair
6. Cannot walk far or manage stairs or can only do so with difficulty
7. Limited ability to reach
8. Mental health problems or difficulties
9. Dyslexia
10. Other illnesses or health problems which limit your daily activities or the work that you can do (specify)
11. None
12. Don't know
13. Would rather not say

Appendix 2: Omnibus

3000 short interviews were conducted via GfK's weekly nationally representative telephone omnibus.

The questionnaire

ASK ALL / SINGLE CODE

Q1 Which company does your household use for normal, landline telephone calls? If you use more than one company for landline calls, please tell me about the one you use most often. We are only interested in the company you use for household landline calls. This may be different to your line rental provider, and does not include mobile calls.

1. BT
2. Virgin Media
3. Talk Talk/ AOL
4. Sky
5. Other

DK. Don't Know

ASK ALL / SINGLE CODE

Q2 And thinking of your personal mobile phone, so not one that might be provided to you by your work, which network are you on? Again if you have more than one mobile phone network provider, please tell me about the one you use most often.

1. O2
2. Orange
3. T-Mobile
4. 3
5. Virgin Mobile
6. Vodafone
7. Don't have a personal mobile
8. Other

DK. Don't Know

ASK ALL / SINGLE CODE

Q.3 Which company does your household use for its broadband internet connection? By this I mean, broadband used through your household phone line, and not a mobile broadband connection where you plug a USB dongle into your computer. If you have more than one household broadband Internet connection, please tell me about the one you use most often.

1. BT
2. Orange
3. Sky
4. Talk Talk/ AOL/ Tiscali
5. Virgin Media
6. Don't have broadband
7. Other

DK. Don't Know

ASK ALL / SINGLE CODE

Q.4 Which company does your household use for cable or satellite TV, if any? If you use more than one company, please just tell me about the one which you use most often.

1. Sky
2. Virgin Media
3. Don't have pay TV
4. Other

DK. Don't Know

ASK Q.5 FOR ALL COMPANIES CODED AT Q.1/2/3/4 (Q.1 CODES 01-04, Q.2 CODES 01-06, Q.3 CODES 01-05, Q.4 CODES 01-02) AND ASK SEPARATELY FOR EACH SERVICE FOR COMPANIES USED FOR MORE THAN ONE SERVICE:

Q5 Overall how satisfied would you say you are with [PROVIDER] as your provider of [SERVICE] on a 1 to 10 scale where 10 means you are extremely satisfied, and 1 means you are extremely dissatisfied?

SERVICE LIST

1. Landline telephone calls – ASK FOR COMPANY CODED AT Q.1 CODES 01-04
2. Mobile phone services – ASK FOR COMPANY CODED AT Q.2 CODES 01-05
3. Broadband internet – ASK FOR COMPANY CODED AT Q.3 CODES 01-05
4. Satellite or cable TV – ASK FOR COMPANY CODED AT Q.4 CODES 01-02

ASK FOR ALL COMPANIES CODED AT Q.1/2/3/4 (Q.1 CODES 01-04, Q.2 CODES 01-06, Q.3 CODES 01-05, Q.4 CODES 01-02) BUT ONLY ASK EACH COMPANY ONCE IF USED FOR MORE THAN ONE PRODUCT:
SINGLE CODE

Q6 Thinking of [COMPANY] and the services you buy from them, have you contacted them in the last 3 months by telephone or email?

ASK FOR BT IF Q.1 CODE 01 OR Q.3 CODE 01
ASK FOR VIRGIN IF Q.1 CODES 02 OR IF Q.2 CODED 05 OR Q.3 CODED 05 OR Q.4 CODED 02
ASK FOR TALK TALK/AOL/TISCALI IF Q.1 CODED 03 OR Q.3 CODED 04
ASK FOR SKY IF Q.1 CODED 04 OR Q.3 CODED 03 OR Q.4 CODED 01
ASK FOR 02 IF Q.2 CODED 01
ASK FOR ORANGE IF Q.2 CODED 02 OR Q.3 CODED 02
ASK FOR T MOBILE IF Q.2 CODED 03
ASK FOR 3 IF Q.2 CODED 04
ASK FOR VODAFONE IF Q.2 CODED 06

1. Yes
2. No
3. DK

ASK Q.7 AND Q.8 AND Q.9 IN A LOOP FOR THESE SPECIFIED PROVIDERS IF:
BT IF USE BT AT Q.1 AND Q.3 AND CODE 01 FOR BT AT Q.6
TALK TALK IF USE TALK TALK AT Q.1 AND Q.3 AND CODE 01 FOR TALK TALK AT Q.6
ORANGE IF USE ORANGE AT Q.2 AND Q.3 AND CODE 01 FOR ORANGE AT Q.6
VIRGIN IF USE VIRGIN AT 2 OR MORE OF Q.1/2/3/4 AND CODE 01 FOR VIRGIN AT Q.6

SKY IF USE SKY AT 2 OR MORE OF Q.1/3/4 AND CODE 01 FOR SKY AT Q.6

MULTICODE – ONLY SHOW RELEVANT SERVICES TO INTERVIEWER

Q.7 Thinking now of the MOST RECENT issue you had to contact [COMPANY] about, which of the services that you buy from them was it relating to, was it for [LIST SERVICES USED], or was it a general issue that applies to all?

1. Landline phone (FROM Q.1)
2. Mobile phone (FROM Q.2)
3. Broadband (FROM Q.3)
4. Cable or satellite TV (FROM Q.4)
5. General issue
6. Don't Know

ASK Q.8 and 9 FOR ALL COMPANIES CODED AT Q.1/2/3/4 (Q.1 CODES 01-04, Q.2 CODES 01-06, Q.3 CODES 01-05, Q.4 CODES 01-02) AND CODED 01 AT Q.6 BUT ONLY ASK EACH COMPANY ONCE IF USED FOR MORE THAN ONE PRODUCT:
ASK FOR BT IF Q.1 CODE 01 OR Q.3 CODE 01 AND Q.6 CODE 01
ASK FOR VIRGIN IF Q.1 CODES 02 IF Q.2 CODED 05 OR Q.3 CODED 05 OR Q.4 CODED 02 AND Q.6 CODE 01
ASK FOR TALK TALK/AOL/TISCALI IF Q.1 CODED 03 OR Q.3 CODED 04 AND Q.6 CODE 01
ASK FOR SKY IF Q.1 CODED 04 OR Q.3 CODED 03 OR Q.4 CODED 01 AND Q.6 CODE 01
ASK FOR 02 IF Q.2 CODED 01 AND Q.6 CODE 01
ASK FOR ORANGE IF Q.2 CODED 02 OR Q.3 CODED 02 AND Q.6 CODE 01
ASK FOR T MOBILE IF Q.2 CODED 03 AND Q.6 CODE 01
ASK FOR 3 IF Q.2 CODED 04 AND Q.6 CODE 01
ASK FOR VODAFONE IF Q.2 CODED 06 AND Q.6 CODE 01

SINGLE CODE, PROMPTED, ROTATE ORDER (EXCEPT 07 WHICH IS ALWAYS LAST)

Q.8 And thinking of the most recent issue you had to contact [COMPANY] about, which of the following categories did the issue fall into? Was it to do with…

1. A billing, pricing or payment issue
2. A problem with your account details, for example name and address etc.
3. A fault with the service you are buying from them, for example total or partial failure of service
4. The service not performing as well as expected, for example issues with picture quality, broadband speed, mobile coverage etc.
5. Problems with the repair service, for example it didn't happen or didn't solve the problem
6. A problem relating to the installation or set up of your service
7. Or something else, a general issue

READ OUT. SINGLE CODE

Q.9 Did you discuss this issue with [COMPANY] only or mainly via the phone, email, the company's website or a letter sent in the post?

1. By phone
2. By email
3. By website
4. By letter

Appendix 3: Sample profile

It was the objective of the study to gain a representative sample of the UK population who have recently contacted their service provider about a billing/ fault/ general issue. During fieldwork, therefore, a quota sample methodology was adopted to ensure that minimum targets were achieved for the providers and also for the three issue types.

Table 1.1: Unweighted profile of the online survey data

	Total Base	2009	2011
Gender	Male	48%	38%
	Female	52%	62%
Age	18-24	15%	12%
	25-34	26%	23%
	35-44	22%	23%
	45-54	17%	18%
	55-64	11%	16%
	65+	9%	9%
Working Status	Full time	52%	49%
	Part time	15%	17%
	Other	33%	34%
Region (GOR)	East Midlands	8%	7%
	Eastern	5%	6%
	London	13%	11%
	North East	6%	5%
	North West	11%	12%
	Scotland	11%	8%
	South East	17%	18%
	South West	7%	9%
	Ulster / Northern Ireland	2%	1%
	Wales	4%	5%
	West Midlands	8%	9%
	Yorks & Humber	8%	9%