Consumer Switching and Bundling

A report commissioned by

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1. Executive summary

Incidence of switching and considering

- A majority of decision makers have neither switched nor considered switching provider in the last year.
- There is greater experience of switching in the last year relating to services in a bundle compared to standalone services. This experience mostly relates to switching any individual services within or to the bundle of services. Few have switched the whole bundle of services in the last year.
- Fixed broadband is the standalone service most likely to have been switched in the last year, and pay TV as a standalone service is the least likely.

Hassle

- While most switchers rate the switching process as easy, around one in ten say it was difficult to change to a new provider.
- The MAC/ PAC and C&R processes are more likely to be rated as difficult compared to the NoT process for fixed broadband.
- The C&R process is more likely to be rated as difficult compared to the NoT process for fixed line voice.
- Those switching fixed broadband are more likely to say that they found any of the aspects of switching that we asked about to be difficult compared to those switching other services.
- While no single switching process is more likely to be rated as difficult by switchers, the NoT process is the most likely to be rated as easy, with the C&R process the least likely to be rated as easy. The responses from those using the MAC or PAC process indicate that the PAC process is more likely to be rated as easy.
- The C&R process is also the least likely to be rated as easy for making contact with providers in order to make the switch.
- Compared to those using the NoT process, those using MAC/ PAC or C&R are more likely to agree that changing providers seems like too much hassle.
- Across all decision makers, those who have neither switched nor considered switching are the most likely to agree that changing providers seems like too much hassle. For these inactive consumers, the strongest association with hassle is searching for information about other providers they could use.
- The switching process and save activity play a role in considerers deciding not to switch, but inertia, no benefit in moving and contractual terms are also likely barriers.
- Save activity is more likely to play a role in considerers deciding not to switch a bundle of services or mobile provider as compared to considerers deciding not to switch their pay TV or fixed line voice service. Inertia/ satisfaction with the existing provider is the key reason for not considering switching among inactive decision makers, with reasons relating to perceived hassle of process obstacles given by around one in ten inactive consumers.

Clarity

- A significant minority of those who have considered switching provider in the last 12 months do not know which process they would need to go through in order to switch.

- Very few considerers volunteer that a lack of knowledge of the necessary switching process was a reason for deciding not to switch provider in the last year.

- Where just one or two switching processes are available, an additional group of considerers incorrectly identify the process they would need to go through to switch provider.

- Those using the C&R process to switch fixed broadband or fixed line voice provider are more likely to have had to pay an early termination charge to their previous supplier in order to leave their contract.

- All decision makers state a preference for a guaranteed date for the switch over the switch happening as quickly as possible, with the strongest preference among considerers compared to switchers or inactive consumers.

Contact with providers

- At least one in ten switchers say it was difficult to get their previous provider to provide the information needed to be able to switch to another provider.

- Among fixed broadband switchers, those using MAC or C&R are more likely than those using NoT to say it was difficult to get this information from the previous provider. Among fixed line voice switchers, those using C&R are more likely than those using NoT to say it was difficult to get this information from the previous provider.

- Making contact with providers is more likely to be rated as difficult by those using C&R to switch fixed broadband or fixed line voice.

- A minority of those switching provider in the last 12 months listened to an offer to stay from their previous provider, through a combination of no offer being made and the switcher choosing not to listen to an offer from their previous provider.

- Those switching fixed broadband or fixed line voice, dominated by the NoT process led by the gaining provider, are the least likely to have experienced save activity on the part of the previous provider.

- Around one in ten switchers who were in contact with their previous provider about the switch say they felt put under pressure to stay.

- Among those who have considered switching to another provider in the last 12 months, a minority were in contact with their provider about their intention to switch.

- Where contact was made by considerers, around half experienced a save offer from their provider, with around four in five of these accepting the offer.

- Around one in five considerers who were in contact with their previous provider about the switch say they felt put under pressure to stay.

- Both switchers and considerers are more likely to prefer an opt-in system over an opt-out system for save activity.

Slamming

- 2% of decision makers have experienced slamming for their communications services in the last 12 months

Continuity of service

- Around one in four switching pay TV or fixed broadband in the last year experienced a period with an unwanted break with no service, with an average break of 12 days. While this is less likely for the other services, at least one in ten switching a bundle, fixed line voice or mobile provider experienced an unwanted break with no service.

- Around one in seven switching a bundle, fixed broadband service or mobile provider experienced a period paying more than one company to ensure continuity of service, and around one in ten switching pay TV or fixed line voice service. For these switchers, the average period paying more than one company is 12 days, with an average additional cost of £30.

- Those using the MAC process to switch fixed broadband and the C&R process to switch fixed line voice are more likely to have experienced paying more than one company to ensure continuity of service.

- Those using the C&R process to switch fixed broadband or to switch fixed line voice are more likely to have experienced an unwanted break with no service.

Email addresses

- One in five or fewer fixed broadband switchers or considerers used and wanted to continue to use an email address from their broadband provider.

- Experience of any difficulties in continuing to use the email address when switching or considering switching accounts for just 3% of switchers and 6% of considerers.

- Those aged 55 and over and those in C1 socio-economic groups are more likely to use an email address from their broadband provider. Those aged 55 and over are more likely to have experienced difficulties continuing to use their email address; accounting for 7% in this age group.

Impact of experience

- At least six in ten switchers say their experience has made no difference to their propensity to switch in future, with most of the remainder saying that they are now more likely to switch in future.

- Switchers who say they are now less likely to switch in future account for around one in ten or fewer of all switchers.

- The proportion of considerers who say they are now less likely to switch in future is higher than among switchers; accounting for between one in ten and one in five of all considerers.

- Switchers who used the NoT or MAC/ PAC process are more likely to switch in future compared to those using C&R. Intentions among those switching using MAC and those switching using PAC do not differ significantly.

Bundled services

- Half of all decision makers have a bundle of communications services.
- The youngest and oldest consumers and those in lower income households are less likely to have a bundle of services.
- Cost savings are the key reason for taking a bundle, followed by convenience.
- Close to half of those with pay TV or fixed broadband in their bundle did not hold these services before they held their current bundle, while half or more of those with mobile phone or fixed line voice in their bundle switched these services from another provider.
- Services held in a bundle are relatively unlikely to have been previously held in a bundle with another provider.

2. Introduction

This section sets out the key objectives of the research and explains the research methodology and analysis.

2.1 Background

Ofcom's principal duty under Section 3(1) of the Communications Act 2003 is:

- to further the interest of citizens in relation to communications matters; and
- to further the interests of consumers in relevant markets, where appropriate by promoting competition.

Effective competition delivers choice, lower prices and innovation. However, in order to benefit from competition, consumers must have confidence to be able to exercise choice. This means that consumers should be able to switch between services and providers without undue effort, disruption and anxiety. A lack of consumer confidence in switching processes may mean consumers choose not to switch. This could dampen the competitive process and consumers will not receive the benefits from competition they should be able to expect.

Different switching processes have evolved across different communications sectors over time. This has resulted in the existence of multiple switching processes, even for switching the same set of services.

Ofcom is concerned that several potential barriers exist in switching services between communications providers, which may result in consumers choosing not to switch or switching but having a poor experience.

This research was required to better understand switching behaviour as well as the barriers consumers face in changing their broadband, mobile, fixed line voice and pay TV providers. In addition, with an increasing number of consumers now taking multiple services from a single provider, the research was also required to look at bundling in more detail.

2.2 Research methodology and analysis

This report draws on research conducted with decision makers aged 16 and over. An initial phase of quantitative research was followed by some in-depth qualitative interviews.

Quantitative research

A sample frame was constructed using postcode geography to reflect the required sample. Sample points were selected with probability proportional to size to ensure a representative sample, with quota control by three key variables (age, gender and socio-economic group) to control the sample interviewed within each sampling point.

The Output Areas[1] in the UK were grouped into sampling units (SUs), which were then stratified by region and rural/urban:

- firstly, all the SUs were sorted by region,
- the SUs were then sorted within region by rural/urban.

[1] The 1991 Census Data was classified using Enumeration Districts (ED's). The 2001 Census data has been classified using Output Areas (OAs). These areas are broadly the same, but with slightly different boundaries.

Since region has been used as the first sorting variable, regional distribution of SUs will be more or less in proportion to the number of residential addresses in each region.

The size of a SU is measured by the number of addresses it contains. The SUs were selected with a probability proportionate to size. This ensures that all households within an SU have an equal chance of being selected, regardless of the size of the SU in which a household is situated. The number of interviews per SU was 10.

Interviewers were provided with specific addresses. The average SU contains around 250 households, thus affording tight control over the addresses the interviewers called at.

A quota sample of 2,008 adults aged 16+ in the UK were interviewed from 18 February to 1 March 2010. Interviews were carried out across 214 different sampling points in the UK, face-to-face, in home. The interview was conducted with the person in the household responsible for making decisions about which provider to use for the communications services in the home.

At this initial in-home stage of the quantitative research, all decision makers were eligible to take part in the research. The purpose of this initial stage was to reach a representative sample of UK adult decision makers and provide measures of the incidence of switching and considering switching for each of the four communications services as well as bundles comprising two or more of the services.

In order to be able to report in detail on the different services, service bundles and different switching processes, it was necessary to achieve minimum quotas within the overall interviewed sample. The following table indicates with an asterisk (*) the groups of interest requiring a minimum sample of interviews from the quantitative research.

Switched in last year – and switching process used				
	Total	Notification of Transfer	Cease & Re-provide	MAC/ PAC
Fixed line voice	*	*	*	
Fixed line broadband	*	*		*
Pay TV	*		*	
Mobile phone	*		*	*
Considered switching in last year				
Fixed line voice	*			
Fixed line broadband	*			
Pay TV	*			
Mobile phone	*			
Bundle of services currently hold				
Fixed line voice & broadband – from BT	*			
Fixed line voice & broadband – not from BT	*			
Fixed line voice & broadband & Pay TV – Sky	*			
Fixed line voice & broadband & Pay TV – Virgin Media	*			

While some of these minimum quotas were reached through the in-home interviewing, some of the quotas groups were expected to have very low incidence levels which would have required a very substantial overall sample of decision makers in order to reach all of the minimum quotas through the in-home survey.

Detailed questions within the questionnaire used for the quantitative research covered a maximum of two services that had been switched or considered for switching in the last year. It was necessary to set this maximum in order to ensure that the maximum interview length was 55 minutes. The questionnaire used for the in-home interviewing prioritised questions relating to experience of switching in the last year over experience of considering switching and also prioritised experience of switching services expected to have a lower overall incidence of switching.

In order to reach each of the minimum quotas for the different switching processes and the services considered for switching in the last year, a second stage of quantitative research was conducted online. The data collected from the in-home interviewing was assessed and any groups of interest where the minimum quota had not been achieved were identified. The purpose of this subsequent stage conducted online was to ensure that all of the minimum quotas were reached. A total of 863 interviews were conducted online with decision makers from 12 to 19 March 2010.

Data from the in-home and online quantitative interviewing stages has been combined for this report; totalling 2,871 interviews with decision makers. Corrective weighting has been applied in order to accurately represent the experience of switching and considering switching in the last year.

Significance testing

Significance testing at the 95% confidence level was carried out and any findings detailed in this report have been found to be significant to a 95% confidence level. This means that where findings are commented on, there is only a 5% or less probability that the difference between the samples is by chance. Statistically significant findings are indicated in the figures in the report by circles or arrows. Details of what the significance testing indicates are shown at the bottom of each chart.

Qualitative research

Having completed the quantitative stage through a combination of in-home and online interviewing, a stage of qualitative research was conducted in order to provide more depth of information regarding the experience of those decision makers who had switched providers for one or more of their communications services and those who had considered but not switched in the last year.

A total of 32 depth interviews were conducted by telephone with decision makers who had taken part in either the in-home or online quantitative stage, with interviews conducted to the following profile.

Switched in last year – and switching process used				
	Total	Notification of Transfer	Cease & Re-provide	MAC/ PAC
Fixed line voice	**4**	**2**	**2**	
Fixed line broadband	**4**	***2***		**2**
Pay TV	**2**			
Mobile phone	**4**		**2**	**2**
Entire/ part of bundle	**4 (2 double play[2] and 2 triple play[3])**			
Considered switching in last year				
Fixed line voice	**2**			
Fixed line broadband	**2**			
Pay TV	**2**			
Mobile phone	**2**			
Entire/ part of bundle	**4 (2 double play and 2 triple play)**			

[2] Fixed line voice and broadband
[3] Fixed line voice, broadband and pay TV

3. Incidence of switching and considering

This section looks at the incidence of switching provider or considering switching in the last year among those decision makers who have a bundle[4] of services or standalone[5] services.

Key findings

- A majority of decision makers have neither switched nor considered switching provider in the last year.
- There is greater experience of switching in the last year relating to services in a bundle compared to standalone services. This experience mostly relates to switching any individual services within or to the bundle of services. Few have switched the whole bundle of services in the last year.
- Fixed broadband is the standalone service most likely to have been switched in the last year, and pay TV as a standalone service is the least likely.

3.1 More switching in the last year relating to services in a bundle than any of the standalone services

The qualifying questions in the in-home and online questionnaires established which of four communications services were in the household, asking decision makers to select as many as applied from the following options;

- A TV service via cable TV, satellite TV or a broadband connection which you either pay a monthly subscription to receive or you can pay to view particular programmes or films (such as from Virgin media, Sky, BT Vision or Tiscali TV)[6];
- A fixed broadband service through a phone line or cable service into the home (not access through a mobile phone or a 'dongle' you may plug into a USB port on a laptop or computer);
- A mobile phone that you personally use;
- A fixed line phone service for making and receiving calls (not using a mobile phone or the internet to make or receive calls).

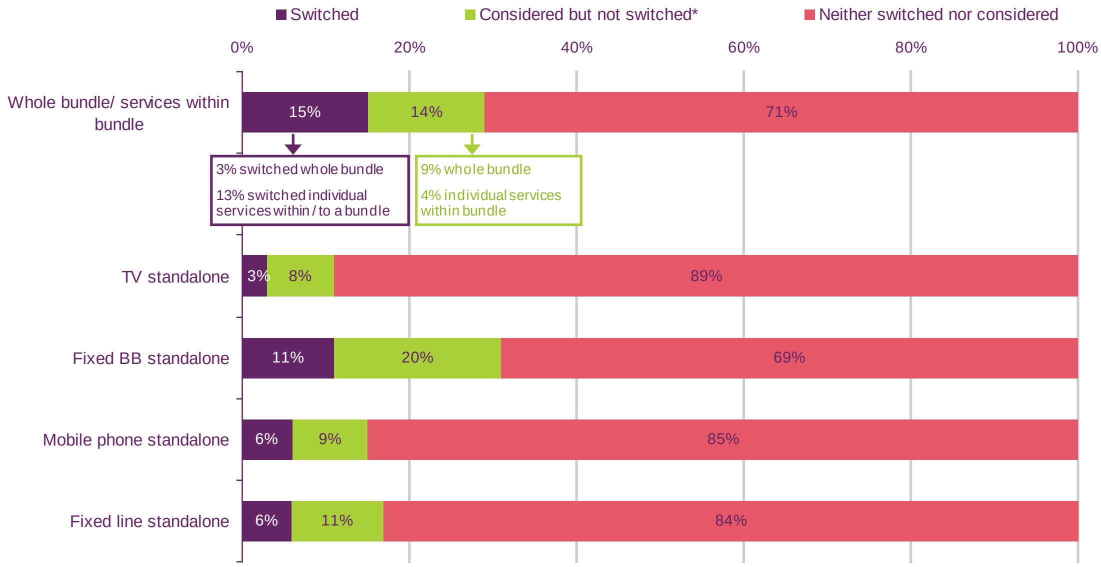
Once it had been established which services were in the household, decision makers were asked to state which provider is used for each service. Where the same provider was used for two or more of the services in the household, decision makers were asked whether they receive one bill or separate bills for those services. Those receiving one bill covering more than one service from the same provider were classified as having a bundle of services. Those using a different provider for each of the services in the household and those receiving separate bills for different services from one provider were classified as having standalone services.

[4] The term 'bundle' is used within this report to indicate where the same provider is used to provide more than one service and these services are covered by a single bill to the household. The bundle may or may not be discounted.
[5] The term 'standalone service' is used within this report to indicate where a provider is used to provide only one service for the household or where multiple services received from the same provider are covered by multiple bills to the household.
[6] This type of TV service is referred to within this report as pay TV.

Those decision makers with a bundle of services were asked whether they had in the last year either switched provider for their whole bundle of services to one other provider, switched provider for any of the individual services in their bundle, considered switching provider for their whole bundle of services to one other provider, or considered switching provider for any of the individual services in their bundle. Those decision makers with standalone services were asked whether they had switched provider or considered switching provider for that service in the last year.

Figure 1 shows the incidence of switching and considering switching in the last year among decision makers with a bundle of services and those with each of the four standalone services. The switching incidence levels for those decision makers with a bundle of services represents both where a whole bundle of services has been switched and where any individual services have been switched within or to a bundle. Similarly the considering incidence levels for decision makers with a bundle of services represents both considering switching a whole bundle of services has been switched and any individual services within or to a bundle.

Figure 1: Incidence of switching and considering switching in the last year[7]



QA26/QA29 – Which of the following applies to your household/[SERVICE] in the last year?
Base: Those with a bundle of services for which they receive one bill (1424), Those with each service as a standalone service (996 TV, 714 fixed broadband, 2556 mobile phone, 1214 fixed line.
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

Among decision makers with a bundle of services as well as those with each of the four standalone services, a majority have neither switched nor considered switching in the last year.

There is a higher incidence of switching relating to services in a bundle than any of the four standalone services; with 15% of those with a bundle having switched the whole bundle (3%) or switching any individual services within or to their bundle of services (13%) in the last year. The standalone service most likely to have been switched in the last year is fixed broadband (11%), while pay TV is the least likely standalone service to have been switched in the last year (3%). Levels of switching standalone mobile phone and fixed line voice services both stand at 6% of decision makers for each service.

[7] The percentages shown within the text boxes in Figure 1 may not add to the percentage shown within the row due to rounding.

Those with a bundle of services are equally likely to have considered switching without doing so as they are to have switched provider in the last year (14% considered vs. 15% switched). Within this overall incidence of considering switching without doing so, 9% considered switching their whole bundle of services from one provider to another with a further 4% considering switching individual services within or to their bundle.

The equal split between switchers and considerers that is evident for those with a bundle of services is not seen for those with standalone services; where decision makers are more likely to be considerers than switchers. This skew towards considerers is most evident among pay TV decision makers (3% switchers vs. 8% considerers). Across each of the services, fixed broadband has the highest proportion of considerers: with one in five fixed broadband decision makers having considered switching provider in the last year (20%) compared to around one in ten for each of the other standalone services.

Figure 2 shows the incidence of switching and considering switching in the last year among decision makers with a bundle of services, comparing the different demographic groups within this overall base of decision makers.

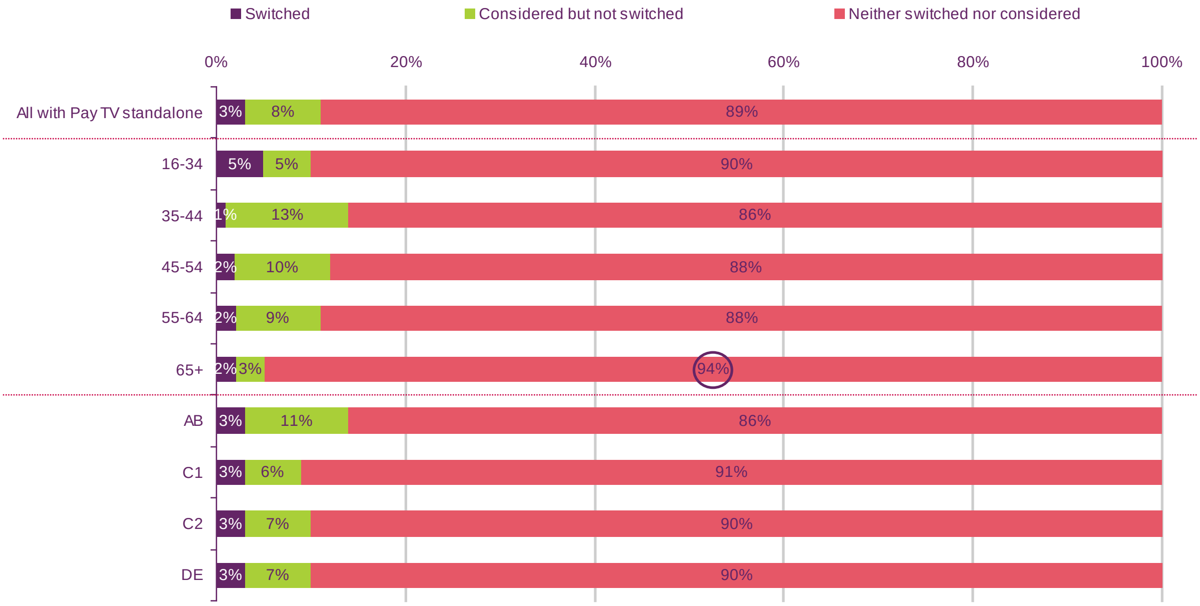
Figure 2: Incidence of switching and considering in the last year among bundle decision makers - by age and socio-economic group

QA26 – Which of the following applies to your household/ [SERVICE] in the last year?
Base: Those with a bundle of services for which they receive one bill (1424 aged 16+, 372 aged 16-34, 314 aged 35-44, 288 aged 45-54, 235 aged 55-64, 215 aged 65+, 413 AB, 439 C1, 277 C2, 294 DE). Significance testing shows any difference between any age group and any socio-economic group and all decision makers with a bundle.
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

Within the overall base of decision makers with a bundle of services, those in DE socio-economic groups are more likely to have neither switched nor considered switching in the last year (79% vs. 71% of all). While the incidence of switching does not differ across the demographic groups, decision makers aged 35-44 are more likely to have considered switching their whole bundle of services in the last year (15% vs. 9% of all).

Figure 3 shows the incidence of switching and considering switching in the last year among decision makers with pay TV as a standalone service, comparing the different demographic groups within this overall base of decision makers.

Figure 3: Incidence of switching and considering in the last year among pay TV decision makers - by age and socio-economic group

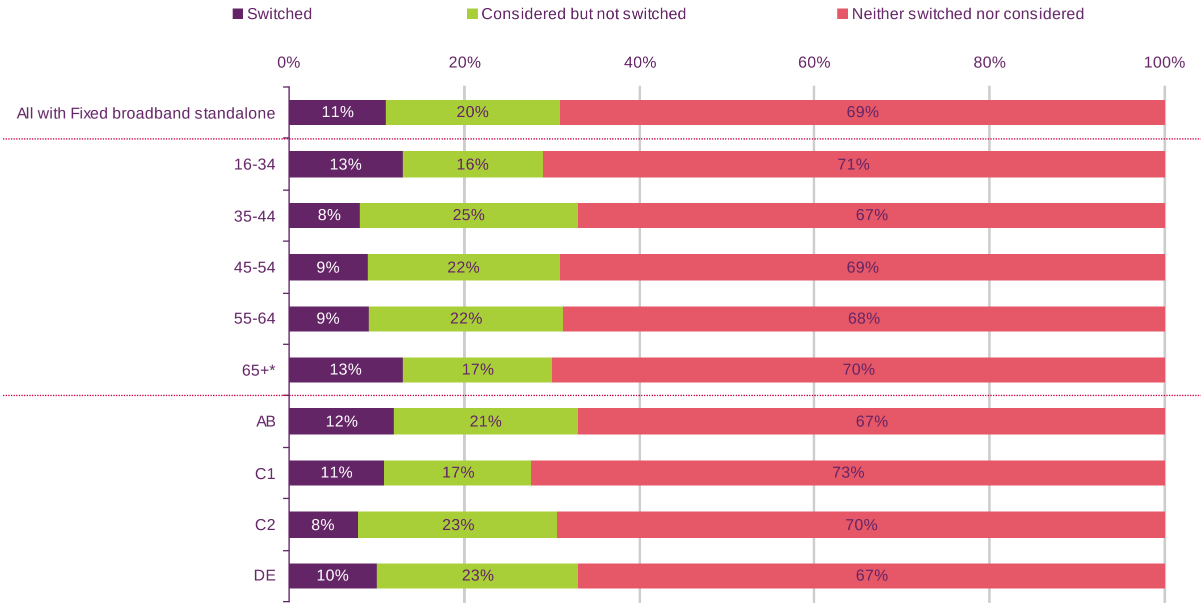


QA29B– Which of the following applies to your TV service with a monthly subscription in the last year?
Base: Those with Pay TV as a standalone service (996 aged 16+, 321 aged 16-34, 199 aged 35-44, 170 aged 45-54, 166 aged 55-64, 140 aged 65+, 299 AB, 275 C1, 195 C2, 227 DE) Significance testing shows any difference between any age group and any socio-economic group and all decision makers with standalone Pay TV.
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

Within the overall base of decision makers with pay TV as a standalone service, those aged 65 and over are more likely to have neither switched nor considered switching in the last year (94% vs. 89% of all). The incidence of switching and considering does not otherwise vary across the demographic groups.

Figure 4 shows the incidence of switching and considering switching in the last year among decision makers with fixed broadband as a standalone service, comparing the different demographic groups within this overall base of decision makers.

Figure 4: Incidence of switching and considering in the last year among fixed broadband decision makers - by age and socio-economic group

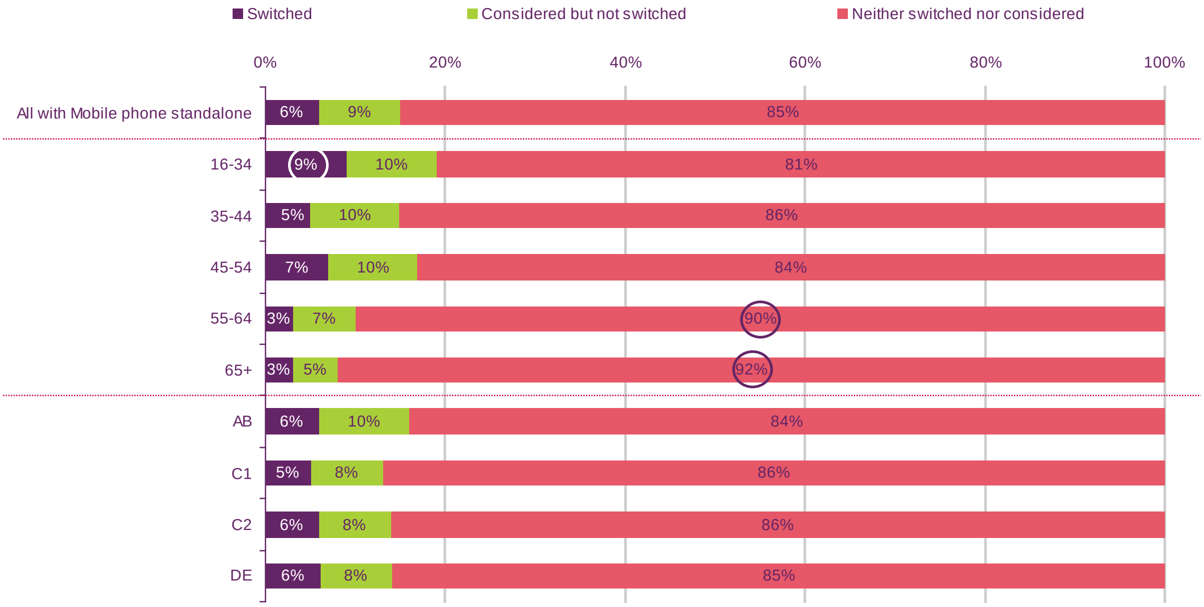


QA29C– Which of the following applies to your fixed broadband service with a monthly subscription in the last year?
Base: Those with Fixed line broadband as a standalone service (714 aged 16+, 236 aged 16-34, 141 aged 35-44, 123 aged 45-54, 121 aged 55-64, 93 aged 65+, 299 AB, 275 C1, 195 C2, 227 DE). Significance testing shows any difference between any age group and any socio-economic group and all decision makers with standalone Fixed broadband.
NB: *Low base for aged 65+; treat as indicative only
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

Within the overall base of decision makers with fixed broadband as a standalone service, the incidence of switching and considering does not vary across the demographic groups.

Figure 5 shows the incidence of switching and considering switching in the last year among decision makers with a mobile phone as a standalone service, comparing the different demographic groups within this overall base of decision makers.

Figure 5: Incidence of switching and considering in the last year among mobile phone decision makers - by age and socio-economic group



QA29D– Which of the following applies to your mobile phone network in the last year?
Base: Those with a mobile phone as a standalone service (2556 aged 16+, 786 aged 16-34, 497 aged 35-44, 454 aged 45-54, 418 aged 55-64, 401 aged 65+, 723 AB, 735 C1, 479 C2, 618 DE). Significance testing shows any difference between any age group and any socio-economic group and all decision makers with standalone Mobile phone.
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

Within the overall base of decision makers with a mobile phone as a standalone service, the youngest decision makers, aged 16-34, are more likely to have switched provider in the last year (9% vs. 6% of all). The oldest decision makers, aged 55-64 and 65 and over are more likely to have neither switched nor considered switching in the last year (90% and 92% vs. 85% of all).

Figure 6 shows the incidence of switching and considering switching in the last year among decision makers with fixed line voice as a standalone service, comparing the different demographic groups within this overall base of decision makers.

Figure 6: Incidence of switching and considering in the last year among fixed line voice decision makers - by age and socio-economic group

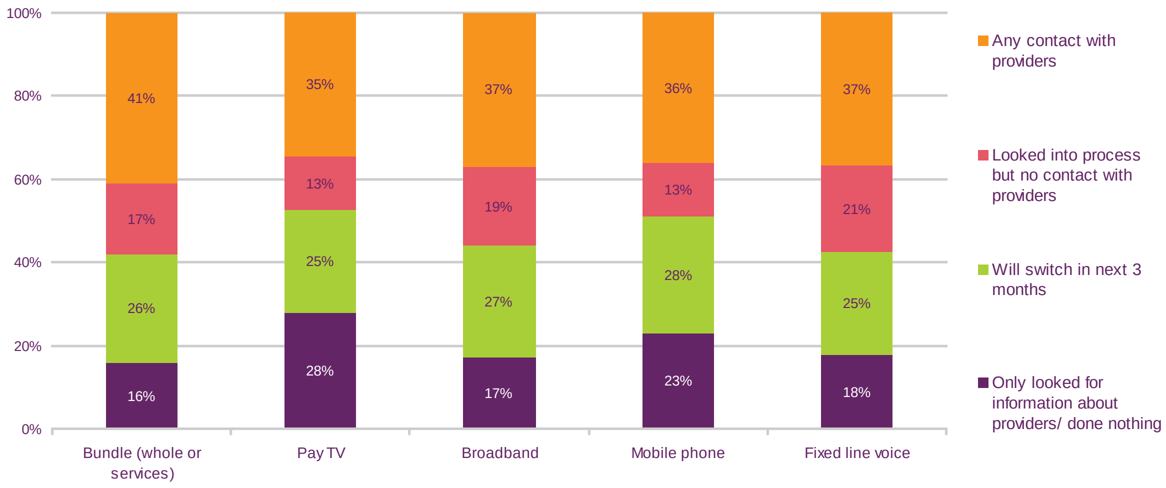
QA29E– Which of the following applies to your fixed line phone service in the last year?
Base: Those with fixed line phone as a standalone service (1214 aged 16+, 292 aged 16-34, 195 aged 35-44, 183 aged 45-54, 208 aged 55-64, 336 aged 65+, 362 AB, 344 C1, 206 C2, 302 DE). Significance testing shows any difference between any age group and any socio-economic group and all decision makers with standalone Fixed line phone.
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

Within the overall base of decision makers with fixed line voice as a standalone service, the incidence of switching and considering does not vary across the demographic groups.

3.2 A minority of those who have considered switching in the last year have made contact with any providers

Decision makers who indicated that they had considered switching provider in the last year were taken through a series of questions to establish the extent of their consideration in terms of whether they had looked into the process they would need to go through in order to change provider. Those who had looked into the process were asked whether they are in the process of actively looking for another provider and, if so, when they expect to switch to another provider. Those who do not expect to switch in the next three months were asked whether they had been in contact with either their current or any new providers.

Figure 7: Actions taken by those who have considered switching provider in the last year



QA30A-E/ QC1/ QC2/ QC19 – Which, if any, of these have you done when considering switching supplier for your (SERVICE) in the last year?/ Are you in the process of actively looking for another provider for your (SERVICE) at the moment?/ When do you expect to switch to another provider for the (SERVICE)?/ In considering switching your (SERVICE) did you contact...
Base: All decision makers who have considered switching provider in the last 12 months (216 Bundle, 164 Pay TV, 261 Fixed Broadband, 331 Mobile phone, 261 Fixed Line voice)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

A minority of those who have considered switching in the last year without doing so have been in contact with any providers and do not expect to switch within the next three months; ranging from 35% of those with pay TV as a standalone service to 41% of those with a bundle of services.

Those who do not expect to switch in the next three months but have not had any contact with providers account for around one in five of all considerers; ranging from 13% of those with pay TV as a standalone service to 21% of those with fixed line voice as a standalone service.

As such, broadly half of those who say they have considered switching in the last 12 months have at least looked into the process they would need to go through in order to change provider and do not expect to switch in the next three months. This group of considerers (shown in the top two bars within Figure 7) could potentially have encountered any barriers to switching and so form the focus of this survey's investigation of the experience of considerers.

3.3 Multiple switching processes available for certain communications services

Different switching processes have evolved across different communications services over time. As a result, there are up to three different processes in use for switching certain communications services. The switching process a consumer needs to use depends on the service being switched and which provider the consumer is moving to and from.

In order to identify any differences in decision makers' switching experiences based on the switching process they went through, decision makers were shown descriptions of the possible switching processes for the service or services they had switched in the last year, and asked to say which one of these processes they had used. The exception to this is pay TV; where just one switching process is available to consumers looking to change from one provider to another.

Figure 8 shows the descriptions of the processes that were used in the questionnaire along with the abbreviations used in this report for each process. The relevant communications services for each process are indicated with an asterisk (*).

Figure 8: Switching processes and communications services

<table>
<tr><th></th><th>Pay TV</th><th>Fixed broadband</th><th>Mobile phone</th><th>Fixed line voice</th></tr>
<tr><td rowspan="2">Notification of Transfer (NoT)</td><td colspan="4">I contacted my new provider to start the switch. My new provider then arranged the switch for me.</td></tr>
<tr><td></td><td>*</td><td></td><td>*</td></tr>
<tr><td rowspan="2">Migration/ Portability Authorisation Code (MAC/ PAC)</td><td colspan="4">I needed to get a code from my old provider to start the switch. I got the code and contacted my new provider to give it to them. My new provider then arranged the switch for me.</td></tr>
<tr><td></td><td>*</td><td>*</td><td></td></tr>
<tr><td rowspan="2">Cease and Re-provide (C&R)</td><td colspan="4">I had to arrange when the old services stopped and the new service started. I contacted my old provider to tell them I wanted to cancel. I contacted my new provider to tell them I wanted to start using their service.</td></tr>
<tr><td>*</td><td>*</td><td>*</td><td>*</td></tr>
</table>

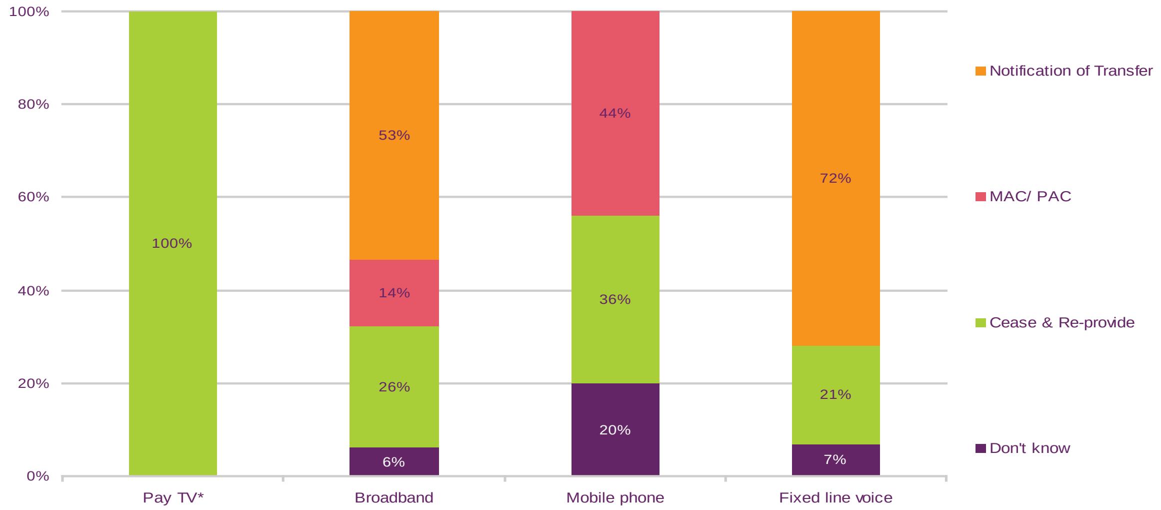
The NoT process is led by the gaining provider following contact from the consumer. The gaining provider places an order on the electronic gateway and the losing provider is notified. The gaining provider sends a welcome letter to the consumer with a transfer date. The losing provider also sends a letter to inform the consumer about the transfer and any relevant terms and conditions including early termination charges. The NoT process therefore does not require the consumer to make contact with the losing provider.

The MAC and PAC processes are led by the losing provider; requiring a unique authorisation code to be obtained by the consumer from the losing provider and then given by the consumer to the gaining provider to allow the service to be switched. The MAC/ PAC processes therefore require the consumer to make contact with the losing provider.

The C&R process can be used for any of the services. The consumer terminates the contract with the losing provider and requests the new service from the gaining provider.

Figure 9 shows the responses from decision makers who have switched provider in the last year in terms of the switching process that was used in order to switch provider for the service. As indicated within Figure 9, those switching pay TV provider were not asked this question as only the C&R switching process is available in order to switch this service.

Figure 9: Switching process used by those changing provider in the last year



QB7B-E – Which one of these best describes the process you went through when you switched your (SERVICE) to the supplier you use now? (Prompted responses, single coded). *NB – Not asked of Pay TV switchers – all must have used C&R
Base: All decision makers who have switched provider in the last 12 months (155 Pay TV, 451 Fixed broadband, 267 Mobile phone, 326 Fixed line voice)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

While close to half (44%) of those switching mobile provider went through the PAC process, led by the losing provider, to switch to another provider, relatively few (14%) went through the MAC process to switch fixed broadband provider. A significant minority of those who have switched mobile provider (20%) were unable to say which process they used. While it could be that these switchers can't remember the process they followed, the proportion who are unable to say which process was used to switch fixed broadband (6%) and fixed line voice (7%) is considerably lower. Within the overall base of mobile phone switchers, the incidence of being unable to say which process was used is considerably higher among those with a pay as you go mobile phone compared to those with a mobile phone contract (50% vs. 7%). These pay as you go switchers may have simply bought a new SIM card in order to switch to another mobile provider, and are therefore less clear about the switching process.

For both fixed broadband (53%) and fixed line voice (72%), the NoT process, led by the gaining provider, was the most commonly used.

4. Hassle

This section looks at a range of issues related to hassle in the context of switching providers, considering switching without doing so and as a reason for neither switching nor considering switching.

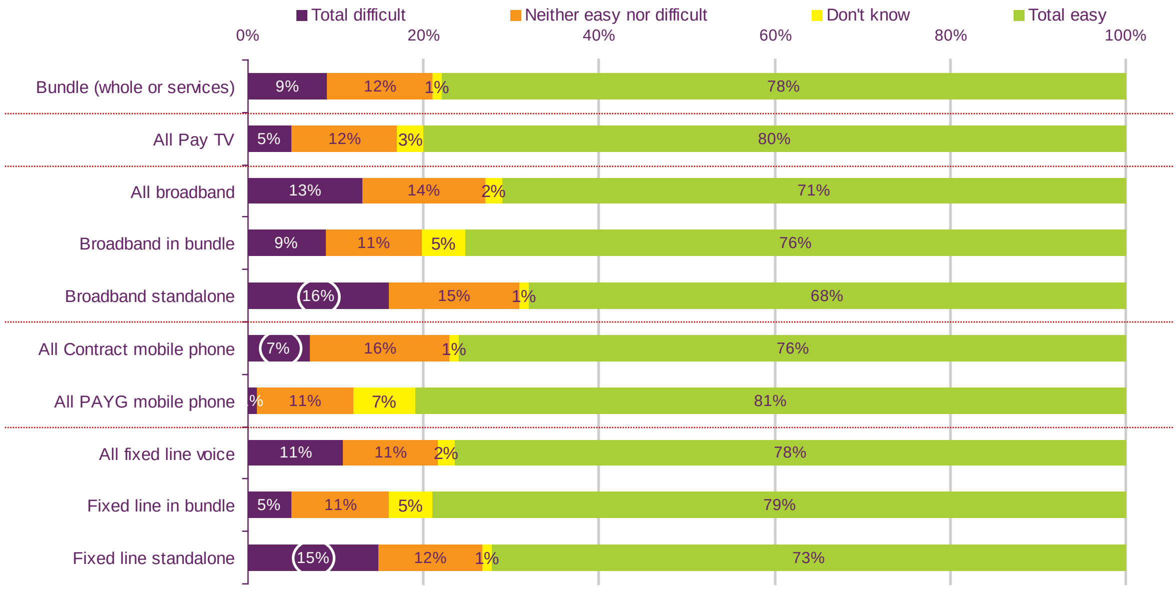
Key findings

- While most switchers rate the switching process as easy, around one in ten say it was difficult to change to a new provider.
- The MAC/ PAC and C&R processes are more likely to be rated as difficult compared to the NoT process for fixed broadband.
- The C&R process is more likely to be rated as difficult compared to the NoT process for fixed line voice.
- Those switching fixed broadband are more likely to say that they found any of the aspects of switching that we asked about to be difficult compared to those switching other services.
- While no single switching process is more likely to be rated as difficult by switchers, the NoT process is the most likely to be rated as easy, with the C&R process the least likely to be rated as easy. The responses from those using the MAC or PAC process indicate that the PAC process is more likely to be rated as easy.
- The C&R process is also the least likely to be rated as easy for making contact with providers in order to make the switch.
- Compared to those using the NoT process, those using MAC/ PAC or C&R are more likely to agree that changing providers seems like too much hassle.
- Across all decision makers, those who have neither switched nor considered switching are the most likely to agree that changing providers seems like too much hassle. For these inactive consumers, the strongest association with hassle is searching for information about other providers they could use.
- The switching process and save activity play a role in considerers deciding not to switch, but inertia, no benefit in moving and contractual terms are also likely barriers.
- Save activity is more likely to play a role in considerers deciding not to switch a bundle of services or mobile provider as compared to considerers deciding not to switch their pay TV or fixed line voice service. Inertia/ satisfaction with the existing provider is the key reason for not considering switching among inactive decision makers, with reasons relating to perceived hassle of process obstacles given by around one in ten inactive consumers.

4.1 A minority of switchers rate the process as difficult

All decision makers who had switched providers in the last year were asked to refer to a scale to say how easy or difficult they had found the switching process. Those switching services in a bundle (whether the whole bundle or any individual services in their bundle) were asked to respond both in terms of their overall experience of switching the services in their bundle and also in terms of their experience of switching each of the services concerned. Figure 10 shows the difficulty ratings given by decision makers switching each service, along with the ratings from those switching services in a bundle and those switching standalone services for fixed broadband and fixed line voice.

Figure 10: Rating of difficulty of the switching process to change provider – by service switched and whether in a bundle or standalone



QB9/ QB10B-E – Overall, how easy or difficult did you find the switching process to change the different services in your package?/ How easy or difficult did you find this switching process for (SERVICE)? (Prompted responses, single coded)
Base: All decision makers who have switched in the last 12 months (125 bundle of services, 155 Pay TV, 489 Fixed broadband, 116 Broadband in package, 373 Broadband standalone, 219 Contract mobile phone, 132 Pay As You Go mobile phone, 335 Fixed line voice, 120 Fixed line in package, 216 Fixed line standalone). Significance testing shows any difference between bundle and standalone for broadband and fixed line, and between PAYG and Contract for mobile phone.
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

Across each of the services a majority of decision makers rate the switching process as easy; ranging from 68% for fixed broadband standalone switchers to 81% for Pay As You Go mobile phone switchers. In almost all cases, decision makers who do not rate the switching process as easy are as likely or more likely to give a neutral (neither easy nor difficult) rating of the process than they are to rate the process as difficult; the exception being those switching fixed line voice as a standalone service (12% neutral vs. 15% difficult).

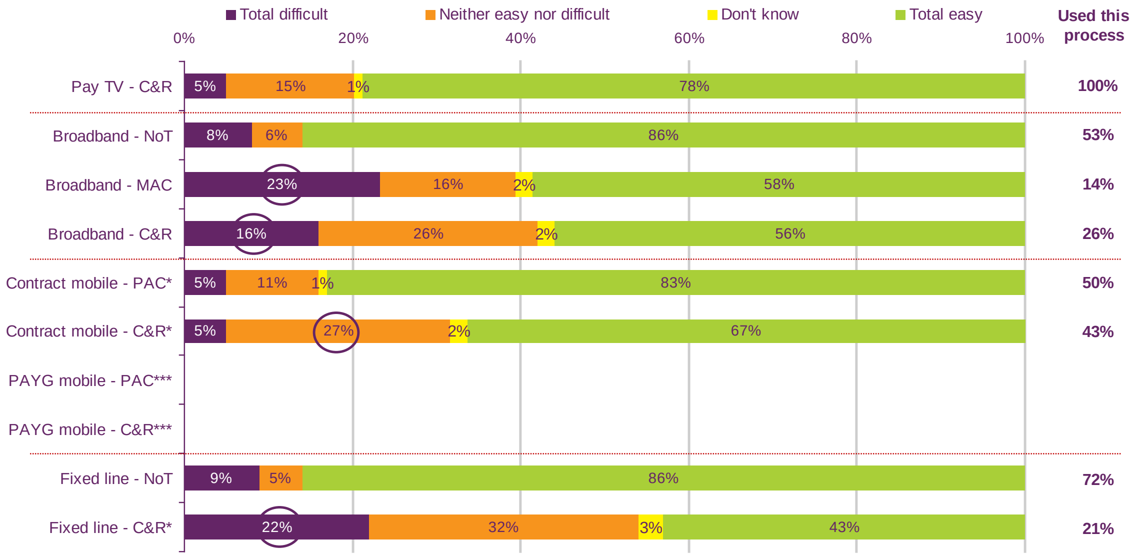
Around one in ten switchers rate the switching process as difficult; ranging from 5% for pay TV switchers to 16% for fixed broadband standalone switchers.

Those switching fixed broadband or fixed line voice as a standalone service are more likely than those switching these services as part of a bundle of services to rate the switching process as difficult (16% vs. 9% for fixed broadband, 15% vs. 5% for fixed line voice). Those with a mobile phone on a monthly contract are more likely than those with a Pay As You Go mobile phone to rate the switching process as difficult (7% vs. 1%).

4.2 The NoT process is less likely to be rated as difficult compared to MAC/ PAC and C&R for fixed broadband and fixed line voice

As already detailed, with the exception of pay TV, there are multiple switching processes in place for switching communications services. Figure 11 compares the difficulty ratings given by those using each switching process to change providers for the different services. Figure 11 also shows the incidence of switchers using each of these processes, to put these findings into context for each service.

Figure 11: Rating of difficulty of the switching process to change provider – by service and switching process used



QB10B-E –How easy or difficult did you find this switching process for (SERVICE). (Prompted responses, single coded)
Base: All decision makers who have switched in the last 12 months (108 Pay TV C&R, 161 Broadband NoT, 125 Broadband MAC, 109 Broadband C&R, 70 Contract mobile PAC, 73 Contract mobile C&R, 206 Fixed line NoT, 75 Fixed line C&R). Significance testing shows any difference between switching processes within each service. *Caution: Low base, ***Base too low for reporting
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

Among those switching their fixed broadband service, those using the MAC or C&R processes are more likely than those using the NoT process to rate the switching process as difficult (23% and 16% vs. 8%). Similarly, among those switching their fixed line voice service, those using the C&R process are more likely than those using the NoT process to rate the switching process as difficult (22% vs. 9%). For both fixed broadband and fixed line voice, therefore, the less commonly used switching processes are more likely to be rated as difficult. In addition, around one third (32%) of those switching their fixed line voice service using the C&R process give a neutral rating for this process, resulting in a minority of these switchers rating the process as easy (43% C&R vs. 86% NoT). Each of the other switching process groups has a majority rating the process as easy.

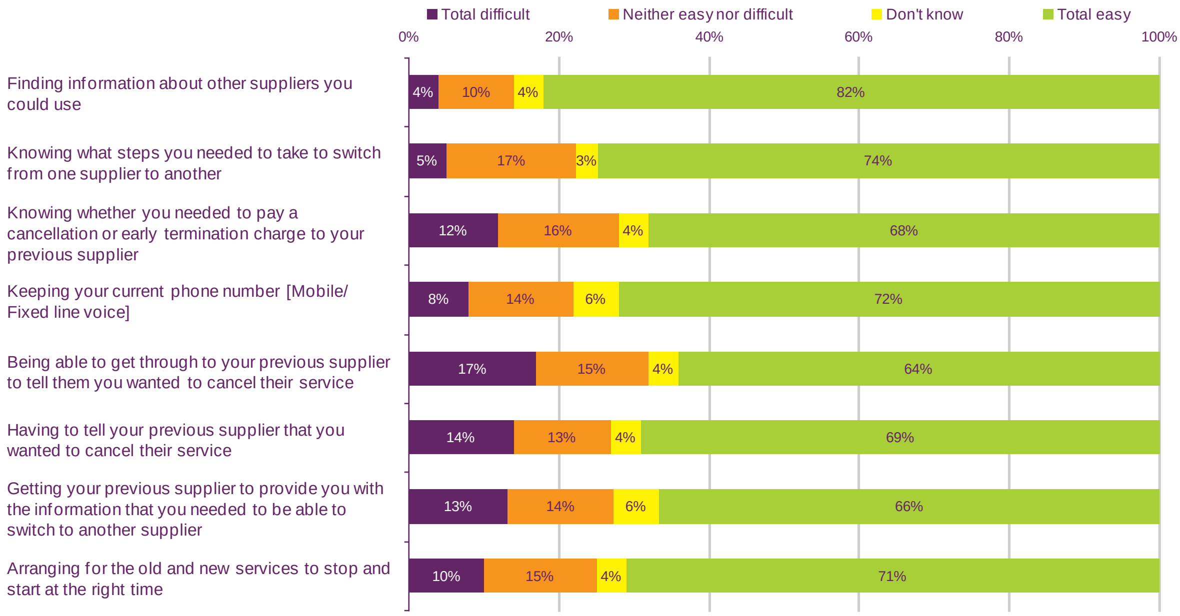
Among those switching mobile with a contract, no switching process stands out as more difficult. Those using the C&R process are more likely to give a neutral rating compared to those using the PAC process (27% vs. 11%), resulting in fewer of these switchers rating the switching process as easy (67% C&R vs. 83% PAC).

The responses from those using the MAC or PAC process indicate that the PAC process is more likely to be rated as easy.

4.3 While a minority experience difficulties, contact with the previous supplier appears more likely to be rated as difficult

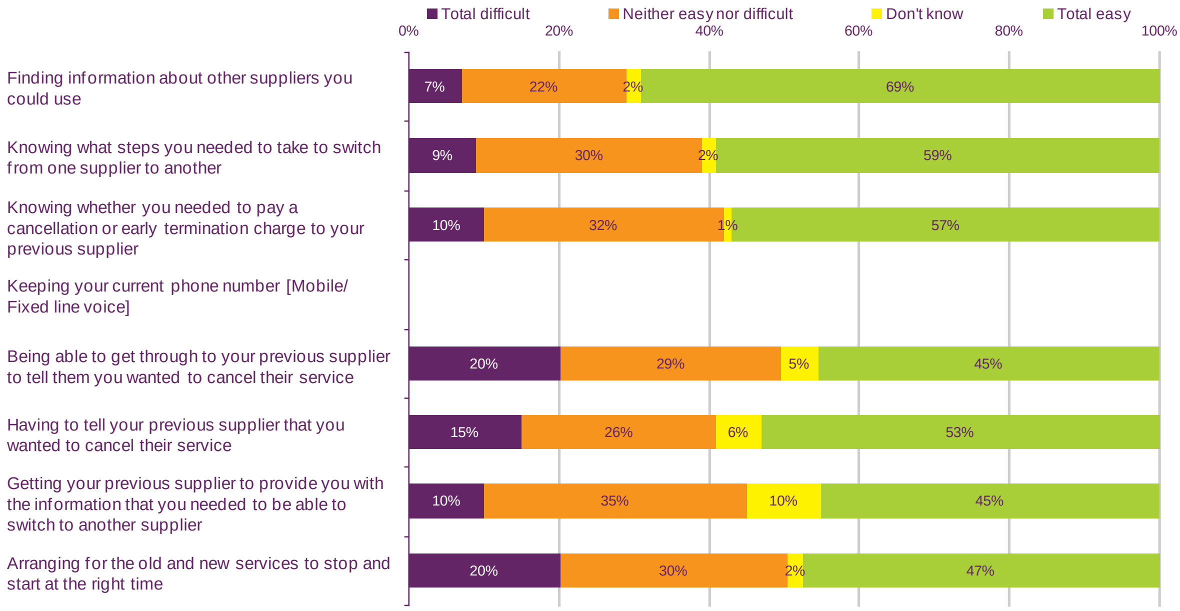
All decision makers who had switched provider in the last 12 months were presented with a series of aspects of the switching experience and were asked to use a scale to say how easy or difficult they had found each of these aspects. Figures 12-16 show the ratings given by those switching each of the five services. Section 4.4 below summarises the extent to which any difficulties were experienced.

Figure 12: Rating of difficulty of aspects of the switching process to change provider – those switching a whole bundle or services within/ to a bundle



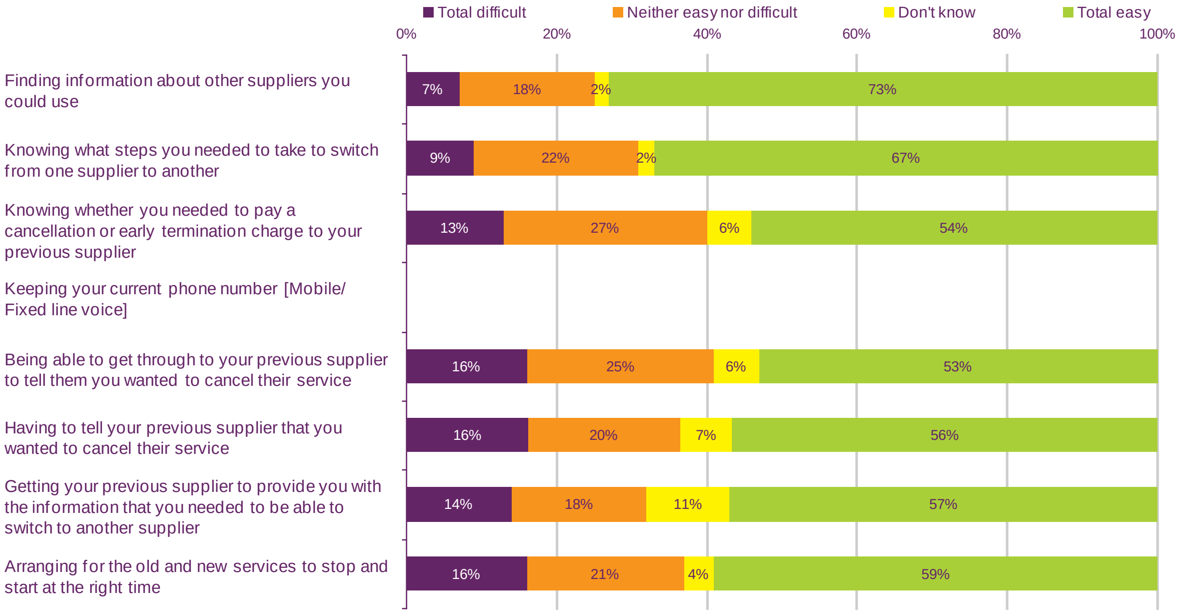
QB12AA-AH – How easy or difficult did you find each of the following aspects when you switched from one provider to another for your package of services? (Prompted responses, single coded)
Base: All decision makers who have switched their package of services in the last 12 months (125)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

Figure 13: Rating of difficulty of aspects of the switching process to change provider – those switching pay TV provider



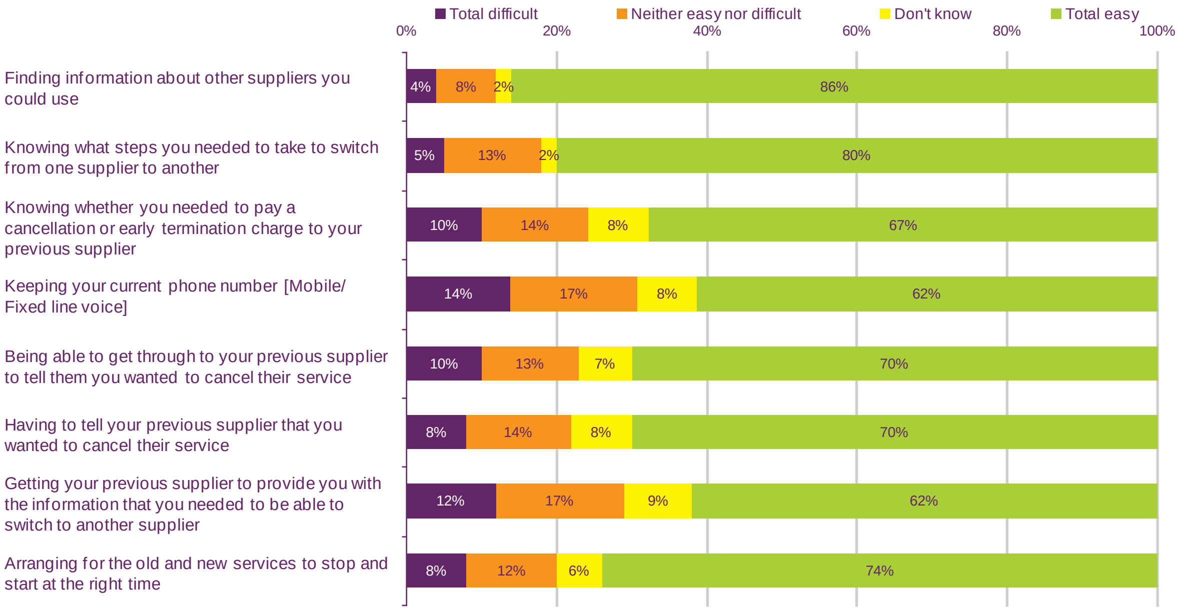
QB12BA-BH – How easy or difficult did you find each of the following aspects when you switched from one provider to another for your package of services? (Prompted responses, single coded)
Base: All decision makers who have switched Pay TV as a standalone service in the last 12 months (87) *Caution: Low base
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

Figure 14: Rating of difficulty of aspects of the switching process to change provider – those switching fixed broadband provider



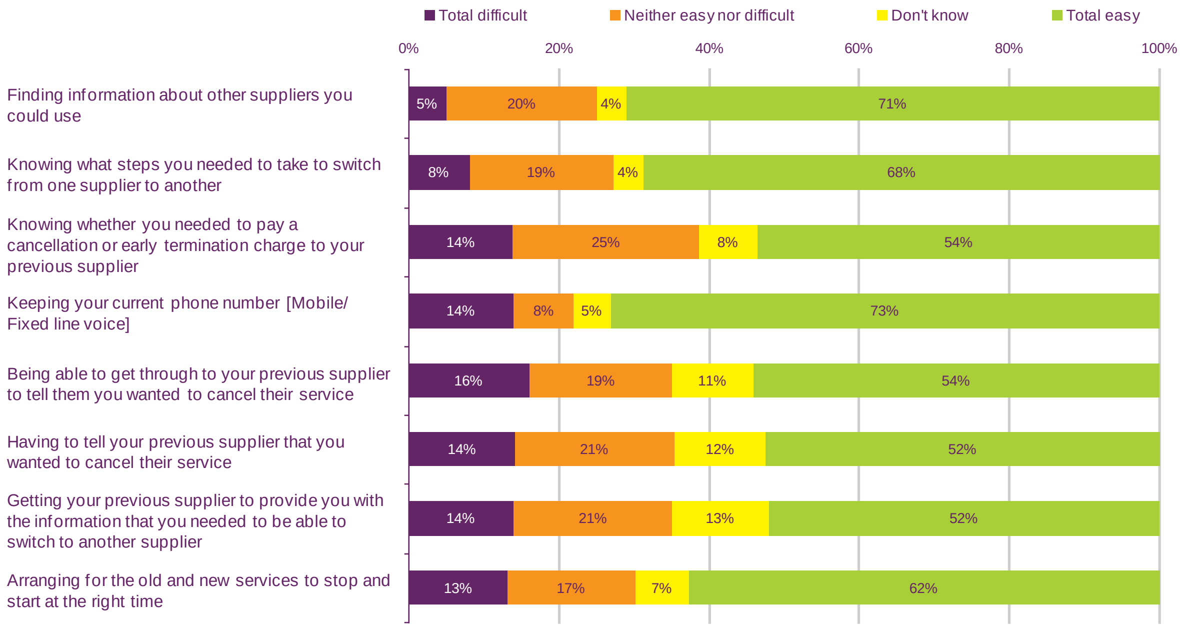
QB12CA-CH – How easy or difficult did you find each of the following aspects when you switched from one provider to another for your fixed line broadband? (Prompted responses, single coded)
Base: All decision makers who have switched fixed line broadband as a standalone service in the last 12 months (373)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

Figure 15: Rating of difficulty of aspects of the switching process to change provider – those switching mobile provider



QB12DA-DH – How easy or difficult did you find each of the following aspects when you switched from one provider to another for your mobile phone network? (Prompted responses, single coded)
Base: All decision makers who have switched mobile phone network as a standalone service in the last 12 months (341)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

Figure 16: Rating of difficulty of aspects of the switching process to change provider – those switching fixed line voice provider

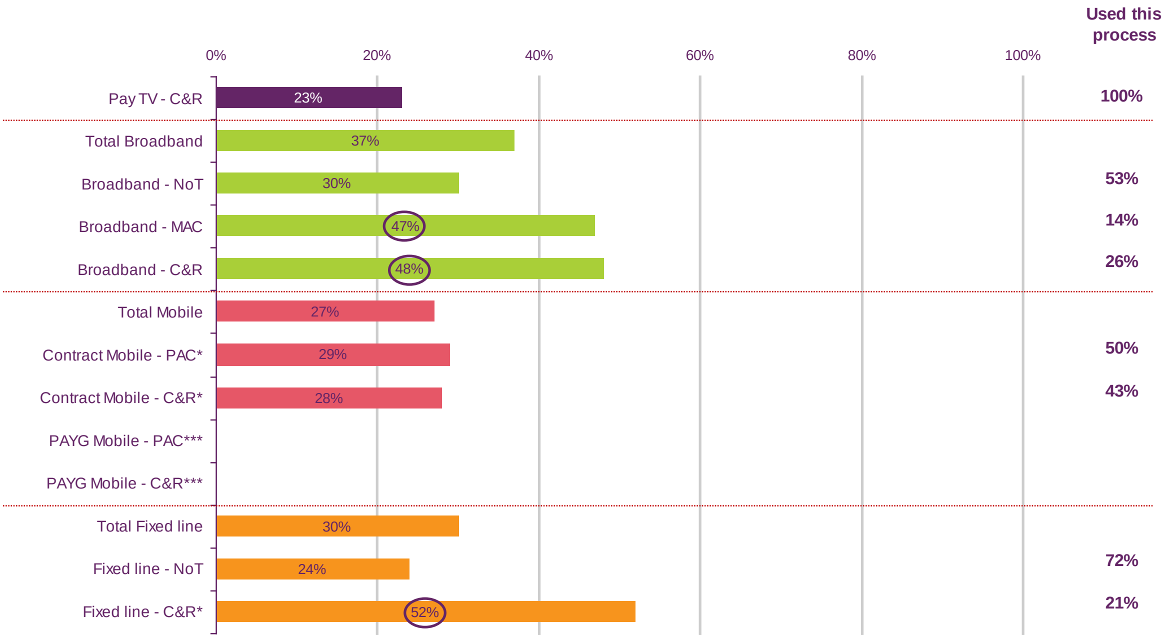


QB12EA-EH – How easy or difficult did you find each of the following aspects when you switched from one provider to another for your fixed line phone? (Prompted responses, single coded)
Base: All decision makers who have switched fixed line voice as a standalone service in the last 12 months (216)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

4.4 While a minority experience difficulties, this is more likely among those switching fixed broadband provider

Figure 17 shows the proportion of decision makers who rated any of the aspects detailed in Figures 12 to 16 as being at all difficult. Responses are shown for all decision makers switching each particular service and those using each of the different switching processes to switch the service in question.

Figure 17: Any difficulties experienced when switching provider – by switching process used



QB12AA-EH – How easy or difficult did you find each of the following aspects when you switched from one provider to another for your (SERVICE)? Base: All decision makers who have switched last 12 months (120 Pay TV C&R, 489 Total Broadband, 161 Broadband NoT, 125 Broadband MAC, 109 Broadband C&R, 341 Mobile, 70 Contract mobile PAC, 73 Contract mobile C&R, 335 Total Fixed line, 206 Fixed line NoT, 75 Fixed line C&R). Significance testing shows any difference between those using each switching processes and all switching that service. *Caution: Low base, ***Base too low for reporting
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

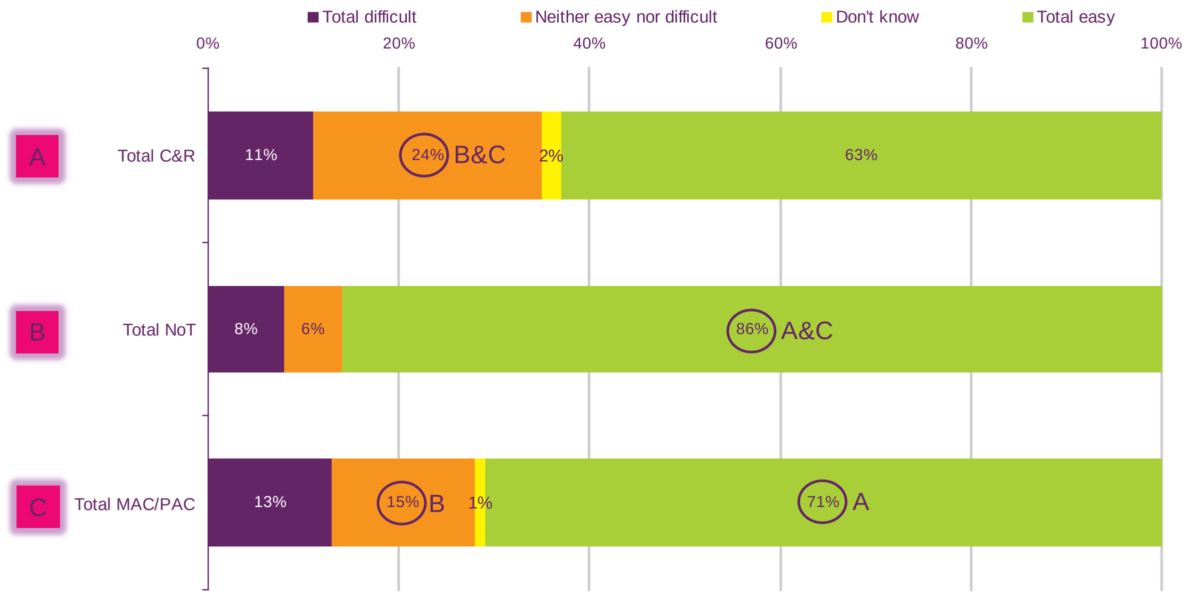
A minority of those switching provider in the last 12 months experienced any of the difficulties that we asked about; ranging from 23% of those switching their pay TV services to 37% of those switching their fixed broadband service. Those switching their fixed broadband provider are more likely than those switching provider for the other three services to experience difficulties when switching provider (37% fixed broadband vs. 30% fixed line voice vs. 27% mobile phone vs. 23% pay TV).

Among those switching their fixed broadband provider, those using the MAC or C&R processes were more likely to experience difficulties compared to those using the NoT process (47% MAC and 48% C&R vs. 30% NoT). Similarly, those switching fixed line voice provider using the C&R process were more likely to experience difficulties compared to those using the NoT process (52% C&R vs. 24% NoT).

4.5 The NoT process is more likely to be rated as easy compared to MAC/PAC and C&R once all services are combined

Figure 18 combines the responses from those switchers using the C&R process (labelled ‘A’) across each of the four communications services, those switchers using the NoT process (labelled ‘B’) across fixed broadband and fixed line voice, and those switchers using the MAC or PAC process (labelled ‘C’) across fixed broadband and mobile phone.

Figure 18: Rating of difficulty of the switching process to change provider – by switching process used across all services



QB10B-E –How easy or difficult did you find this switching process for (SERVICE). (Prompted responses, single coded)
Base: All decision makers who have switched in the last 12 months using C&R (385), NoT (367), MAC/ PAC (231). Significance testing shows any difference across switching processes
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

No single switching process is more likely to be rated as difficult at this overall level, once the specific services that have been switched are combined. While most switchers rate the process used as easy, the NoT process, led by the gaining provider, is more likely than both the C&R and the MAC/ PAC processes to be rated as easy (86% NoT vs. 63% C&R and 71% MAC/ PAC).

Figure 18 combines the responses from those switching using the MAC process for fixed broadband and the PAC process for mobile phone, as both processes require the consumer to get a code from the losing provider and give this code to the gaining provider in order to start the switch. Those using the MAC process are, however, more likely than those using the PAC process to rate the switching process as difficult (23% vs. 6%).

4.6 The MAC/ PAC and NoT processes are more likely than C&R to be rated as easy for making contact with providers once all services are combined

Those switching to another provider were asked to refer to a scale to say how easy or difficult they had found the process of making contact with providers in order to make the switch. Figure 19 combines the responses from those using the C&R process across each of the four communications services, those using the NoT process across fixed broadband and fixed line voice, and those using the MAC or PAC process across fixed broadband and mobile phone.

Figure 19: Rating of difficulty of making contact with providers – by switching process used across all services

QB29A-E – How easy or difficult did you find the process of making contact with suppliers in order to make the switch? (Prompted responses, single coded)
Base: All decision makers who have switched in the last 12 months using C&R (387), NoT (367), MAC/ PAC (237). Significance testing shows any difference across switching processes
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

A majority switchers rate the process of making contact with providers in order to make the switch as easy, but those using the NoT or MAC/ PAC process are more likely to rate the process as easy compared to those using the C&R process (79% NoT and 74% MAC/ PAC vs. 67% C&R). While Figure 18 showed that no single process was more likely to be rated as difficult at an overall level, Figure 19 shows that the C&R process is more likely to be rated as difficult for making contact with providers compared to the NoT process (10% C&R vs. 4% NoT). Those using the C&R process are also more likely than those using the NoT process to give a neutral rating for the ease of making contact with providers (23% C&R vs. 15% NoT).

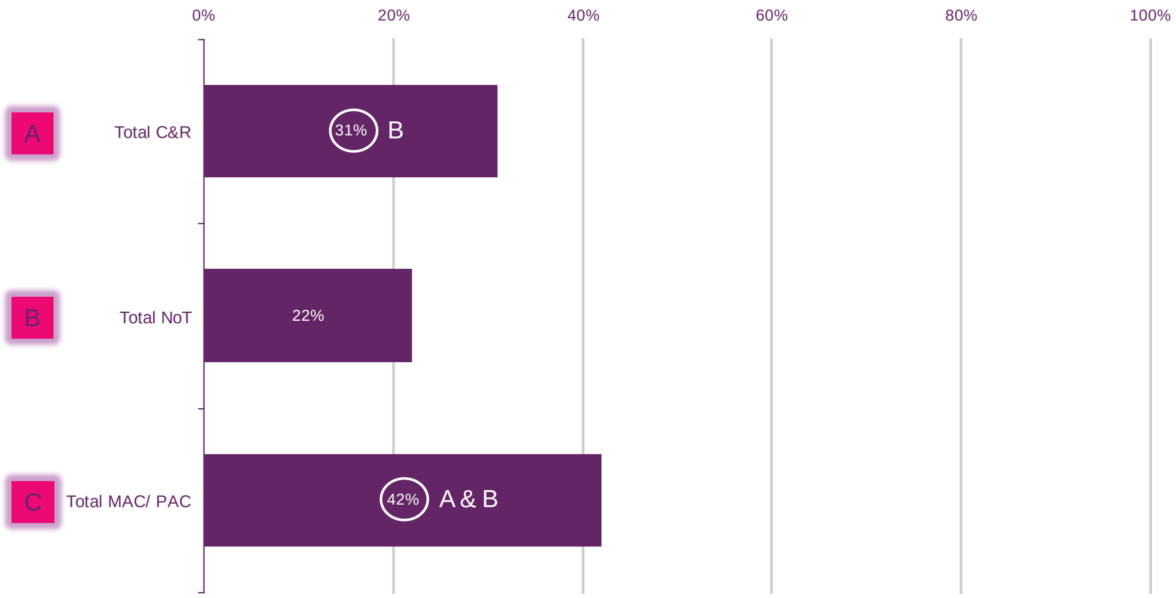
Figure 19 combines the responses from those switching using the MAC process for fixed broadband and the PAC process for mobile phone, as both processes require the consumer to get a code from the losing provider and give this code to the gaining provider in order to start the switch. Individually, neither process is more likely to be rated as difficult for making contact with providers (7% MAC vs. 6% PAC), but the PAC process is more likely to be rated as easy (79% PAC vs. 67% MAC.

4.7 Those using the MAC/PAC process are most likely to agree that switching seems like too much hassle, while those using the NoT process are least likely to agree

Decision makers were asked to refer to a scale to say how much they agreed or disagreed with the statement ‘Changing providers for my home technology seems like too much hassle’.

Figure 20 shows the extent of agreement with this statement having combined the responses from those using the C&R process across each of the four communications services, those using the NoT process across fixed broadband and fixed line voice, and those using the MAC or PAC process across fixed broadband and mobile phone.

Figure 20: Agreement that changing provider 'seems like too much hassle' – by switching process used across all services



QD12I – To what extent do you agree or disagree 'Changing suppliers for my home technology seems like too much hassle'? (Prompted responses, single coded)
Base: All decision makers who have switched in the last 12 months using C&R (385), NoT (367), MAC/ PAC (231). Significance testing shows any difference across switching processes
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

While a minority of switchers using each process agree that changing provider 'seems like too much hassle', those using the MAC/ PAC process are more likely to agree than those using either C&R or NoT to switch provider (42% MAC/ PAC vs. 31% C&R and 22% NoT). By contrast, agreement that changing provider 'seems like too much hassle' is lower among those using NoT, led by the gaining provider, compared to the other two switching processes.

Figure 20 combines the responses from those switching using the MAC process for fixed broadband and the PAC process for mobile phone, as both processes require the consumer to get a code from the losing provider and give this code to the gaining provider in order to start the switch. Individually, agreement that changing provider 'seems likely too much hassle' does not differ to any significant extent across the two processes (39% MAC vs. 44% PAC). Ratings that relate directly to the experience of the switching process (as detailed in Figures 13 and 14) indicate that PAC process users are more likely to rate the switching process as easy compared to MAC process users. This difference between MAC and PAC users is not evident in the degree of agreement that changing provider 'seems likely too much hassle', which refers more generally to changing 'my home technology'.

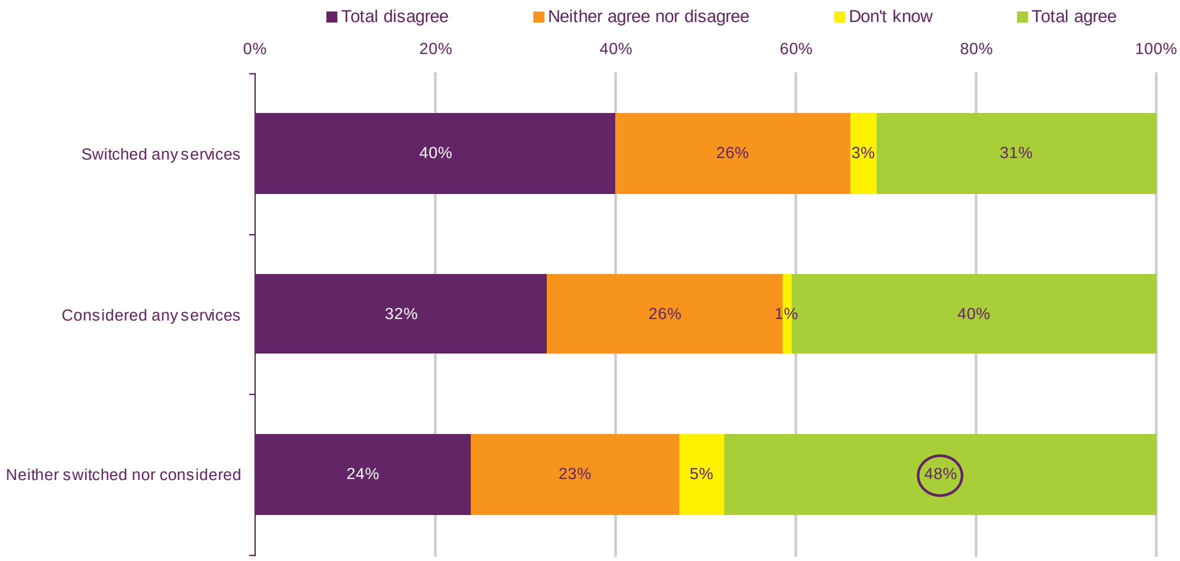
4.8 Inactive consumers are the most likely to agree that changing providers seems like too much hassle

As detailed above, decision makers were asked to refer to a scale to say how much they agreed or disagreed with the statement 'Changing providers for my home technology seems like too much hassle'. While Figure 20 focused on those with experience of switching provider in the last year, Figure 21 shows the extent of agreement with this statement among different groups of decision makers;

- those who have switched any services in the last year;

- those who have considered switching any services in the last year but not switched;
- those who have neither switched nor considered switching any services in the last year.

Figure 21: Agreement that changing provider 'seems like too much hassle' – switchers, considerers and inactive[8] consumers



QD12I – To what extent do you agree or disagree 'Changing suppliers for my home technology seems like too much hassle'? (Prompted responses, single coded)
Base: All decision makers who have switched in the last 12 months (925), all who have considered switching (460), all who have neither switched nor considered (1551)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

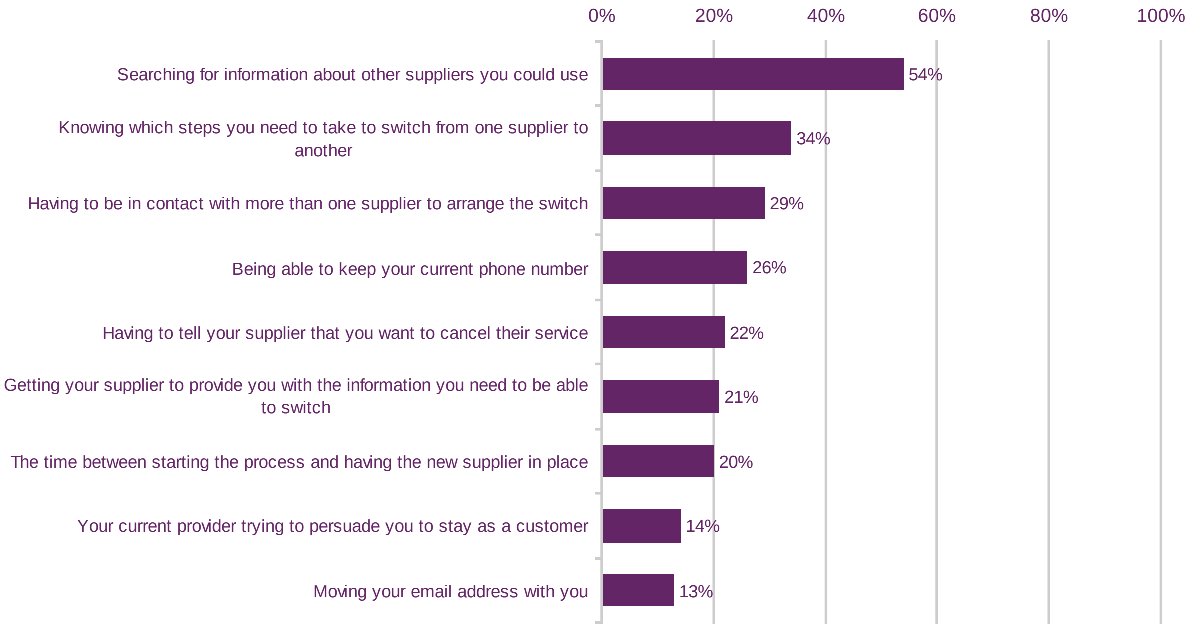
Switchers are less likely than considerers to agree that changing provider 'seems like too much hassle' (31% switchers vs. 40% considerers). Inactive consumers who have neither switched nor considered switching in the last year are more likely than both switchers and considerers to agree that changing provider 'seems like too much hassle', with half of all inactive consumers (48%) agreeing with this statement.

These findings suggest that perceptions of hassle could be a barrier to considering switching among this inactive group of decision makers and, to a lesser extent, a barrier to switching among considerers. Those with experience of switching are relatively unlikely to agree that changing provider 'seems like too much hassle'.

Those with experience of switching or of considering in the last year were asked a series of detailed questions about their experience, in order to assess the range of issues related to hassle in the context of switching or considering switching providers. Those inactive consumers agreeing that changing provider 'seems like too much hassle' were shown a list of possible aspects of switching and asked to say which, if any, of these aspects they would consider to be too much hassle. Responses from these inactive consumers are shown in Figure 22.

[8] Decision makers who have not switched any services and not considered switching any services in the last 12 months are referred to in this document as inactive decision makers or inactive consumers

Figure 22: Aspects of switching considered to be too much hassle by inactive consumers



QD13 – Which, if any, of these aspects would you consider to be too much hassle? (prompted responses, multi-coded) NB: Based on in-home interviewing only
Base: Decision makers who have not switched or considered switching in the last 12 months and who agree that changing suppliers feels like too much hassle (708)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

Among inactive decision makers who agree that changing provider 'seems like too much hassle', the key 'hassle' selected from the list relates to the decision maker searching for information about potential providers; nominated by over half (54%) of these consumers.

The remaining aspects relate more directly to the process of switching; with around one third saying that they consider knowing the necessary steps required to switch provider (34%) and needing to be in contact with more than one provider to arrange the switch (29%) to be hassle. Contact with the current provider features as perceived hassle among inactive consumers with around one fifth nominating having to tell their provider they want to cancel (22%) and getting their provider to give them the necessary information to be able to switch (21%).

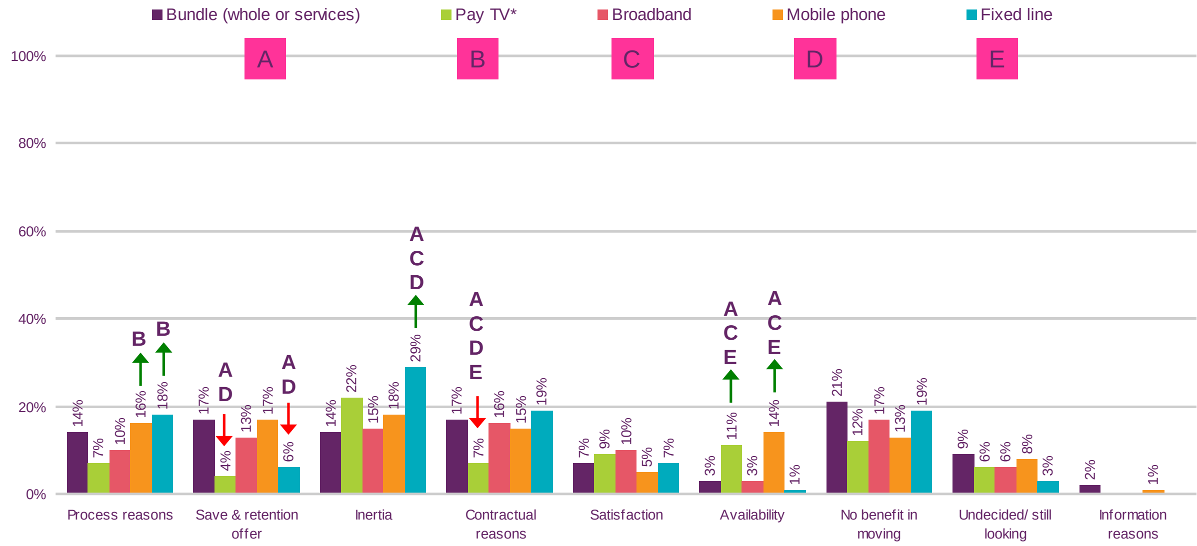
4.9 While the switching process and save activity play a role in considerers not going through with a switch, inertia, no benefit in moving and contractual terms are also likely barriers

Those decision makers who had considered switching provider but not switched in the last 12 months (shown in green in Figure 1) were asked to say why they had decided not to switch provider for the service or services concerned. Considerers were not prompted with any reasons for not switching. Responses have been grouped into the following nine broad reasons:

Process reasons	Take too long to install/ connect a BT line/ phone line Concerned about losing email address/ do not want to give up email address Want to keep phone number/ would need to change phone number Don't know processes would need to go through Process seems daunting/ messy/ complicated Hassle/ too much hassle – unspecified
Save & retention offer	Current provider offered a better/ improved/ enhanced deal/ package Current provider offered a good deal/ price Current provider offered a cheaper deal/ reduced price/ discounted price Current provider matched offer from other provider Current provider offered a new package
Inertia	Haven't got around to it Too busy/ not had time to look/ research Lazy/ can't be bothered to switch Personal circumstances – just had baby/ ill health Will wait until we move house Inconvenient/ easier to stay with current provider
Contractual reasons	Still within contract period Would need to pay to leave contract Still have credit on current phone/ need to wait until credit runs out Would need a BT line/ reconnect BT line/ new phone line
Satisfaction	Happy/ satisfied with current provider/ service Current provider is reliable/ trustworthy/ other providers not as reliable Poor customer services from new provider (e.g. failed appointments) Current provider offers best coverage/ signal in our area
Availability	Choice of new provider – only one/ no others available in our area New provider can't provide what I want – faster broadband/ TV channels/ package options
No benefit in moving	Current provider cheaper/ most competitive/ no better/ cheaper deals available No different/ little difference between providers Too much trouble for the saving/ return involved Cost – unspecified Cost to connect/ reconnect BT line
Undecided/ still looking	Still looking – haven't found a better deal yet Still making a decision/ need time to assess options Waiting to see what offers/ deals become available/ if provider will offer a deal
Information reasons	Hassle finding the best deal Too much information to make a decision Difficult to compare packages/ prices

Figure 23 shows the reasons for considering but not switching each of the services in the last 12 months. In order to show where there are differences across the five services, each has been labelled from A to E, with the green and red arrows within Figure 13 carrying these labels. As an example, those who considered switching pay TV are less likely than those who considered switching each of the other four services to give contractual reasons for deciding not to switch.

Figure 23: Reasons given by considerers for not switching provider in the last year – by service considered for switching



QC5A-E – Why did you decide not to switch to a different provider for your (SERVICE)? (Unprompted responses, multi-coded)
Base: All decision makers who have considered switching provider in the last 12 months, looked into the process, and will not switch soon (114 Bundle, 63 Pay TV*, 134 Fixed broadband, 145 Mobile phone, 106 Fixed line voice) *Caution: Low base. Significance testing shows any difference across services considered for switching.
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

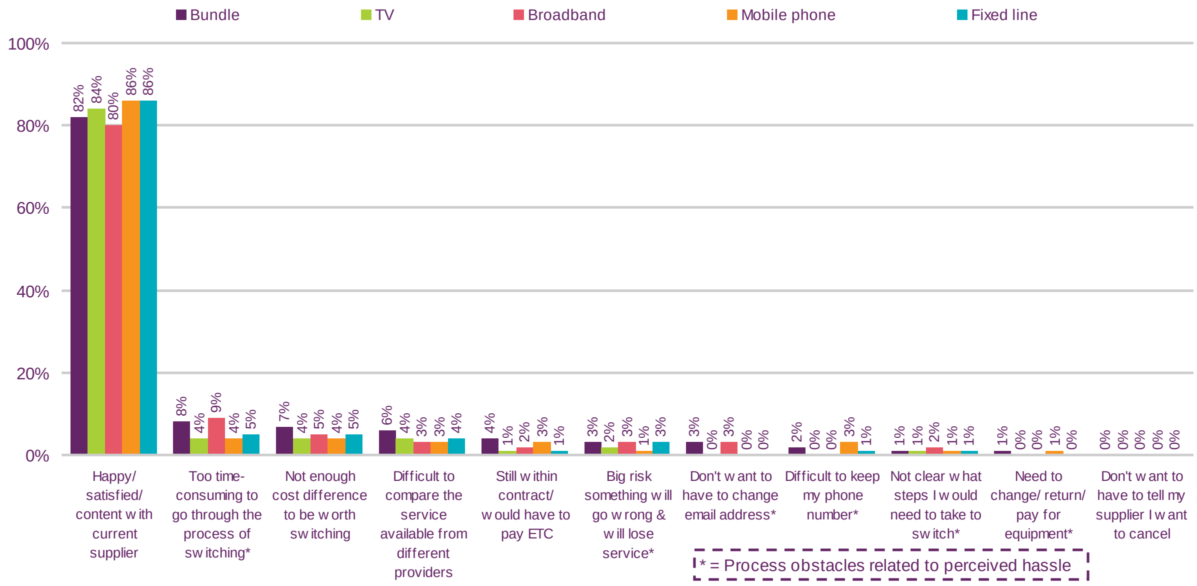
As shown in Figure 23, a variety of reasons for deciding not to switch are given by considerers, and there are some differences across the services considered for switching. Reasons relating to the switching process (18% fixed line voice, 16% mobile phone) and the save and retention offer (17% bundle, 17% mobile phone) both play a role in considerers deciding not to switch for some services, but these reasons are less likely to be given by those considering switching pay TV (7% Process reasons, 4% Save and retention offer). Those considering switching pay TV and mobile phone are more likely than those considering other services to have decided not to switch due to availability (11% pay TV, 14% mobile phone).

While the switching process and save activity play a role in considerers deciding not to switch, inertia, no benefit in moving and contractual terms are also likely barriers.

4.10 Inertia/satisfaction with the existing provider is the key reason for not considering switching among inactive decision makers

Decision makers who had neither switched nor considered switching providers for their services were shown a list of possible reasons for not considering switching to another provider and asked to say which, if any, of these reasons applied to the service concerned. Reasons for not considering switching are shown in Figure 24 for each of the five services.

Figure 24: Reasons given by inactive consumers for not considering switching in the last year – by service



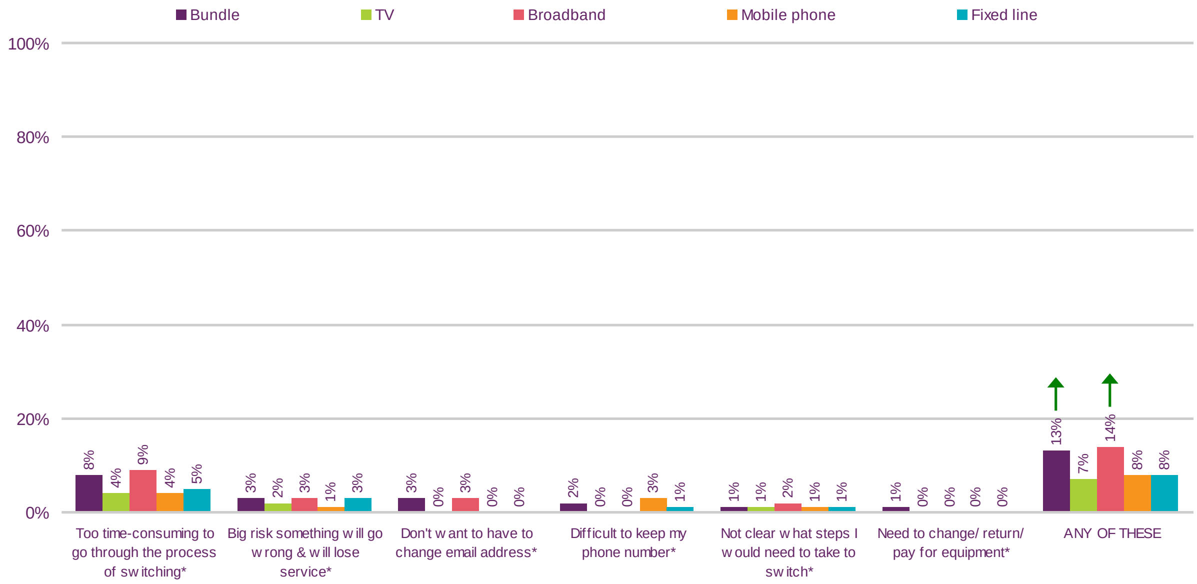
QA32A-E – Which, if any, of these are reasons why you have not considered switching to another supplier for your (SERVICE) in the last year? (Prompted responses, multi-coded) NB: Question only asked in in-home interviewing
Base: Decision makers who have not switched or considered switching in the last 12 months (667 bundle of services, 551 pay TV, 243 fixed broadband, 1519 mobile phone, 686 fixed line voice)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

The key reason for not considering switching across each of the services is satisfaction with the existing provider, which can be interpreted as inertia on the part of the decision maker. Satisfaction with the current provider accounts for around eight in ten inactive decision makers; ranging from 80% for fixed broadband to 86% for mobile phone and fixed line voice.

Perceived hassle associated with switching is unlikely to be a top of mind reason among inactive consumers not considering switching provider. Six reasons for not considering which relate to the perceived hassle of process obstacles to switching are flagged within Figure 25 with an asterisk (*). Each of these six process obstacles related to perceived hassle is mentioned by fewer than one in ten inactive consumers as a reason for not considering switching. Few inactive decision makers who say that they have not considered switching because they are satisfied with their current provider also give any of these hassle-related reasons; ranging from 3% for pay TV to 6% for fixed broadband and 7% for pay TV.

Figure 25 focuses on these six reasons for not considering switching which relate to the perceived hassle of process obstacles to switching and also shows an aggregate measure (labelled ‘Any of these’).

Figure 25: Reasons given by inactive consumers for not considering switching in the last year related to hassle of process obstacles – by service



QA32A-E – Which, if any, of these are reasons why you have not considered switching to another supplier for your (SERVICE) in the last year? (Prompted responses, multi-coded) NB: Question only asked in in-home interviewing
Base: Decision makers who have not switched or considered switching in the last 12 months (667 bundle of services, 551 pay TV, 243 fixed broadband, 1519 mobile phone, 686 fixed line voice)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

Having aggregated the six individual reasons for not considering switching which relate to the perceived hassle of process obstacles to switching, the aggregate measure of these barriers to considering switching range from 7% for those with pay TV to 13% for those with a bundle and 14% for those with fixed broadband. While accounting for a minority of inactive consumers, hassle related to the switching process is more of a barrier to considering switching for those with a bundle and those with fixed broadband.

5. Clarity

This sections sets out the key objectives of the research and explains the research methodology and analysis.

Key findings

- A significant minority of those who have considered switching provider in the last 12 months do not know which process they would need to go through in order to switch.
- Very few considerers volunteer that a lack of knowledge of the necessary switching process was a reason for deciding not to switch provider in the last year.
- Where just one or two switching processes are available, an additional group of considerers incorrectly identify the process they would need to go through to switch provider.
- Those using the C&R process to switch fixed broadband or fixed line voice provider are more likely to have had to pay an early termination charge to their previous supplier in order to leave their contract.
- All decision makers state a preference for a guaranteed date for the switch over the switch happening as quickly as possible, with the strongest preference among considerers compared to switchers or inactive consumers.

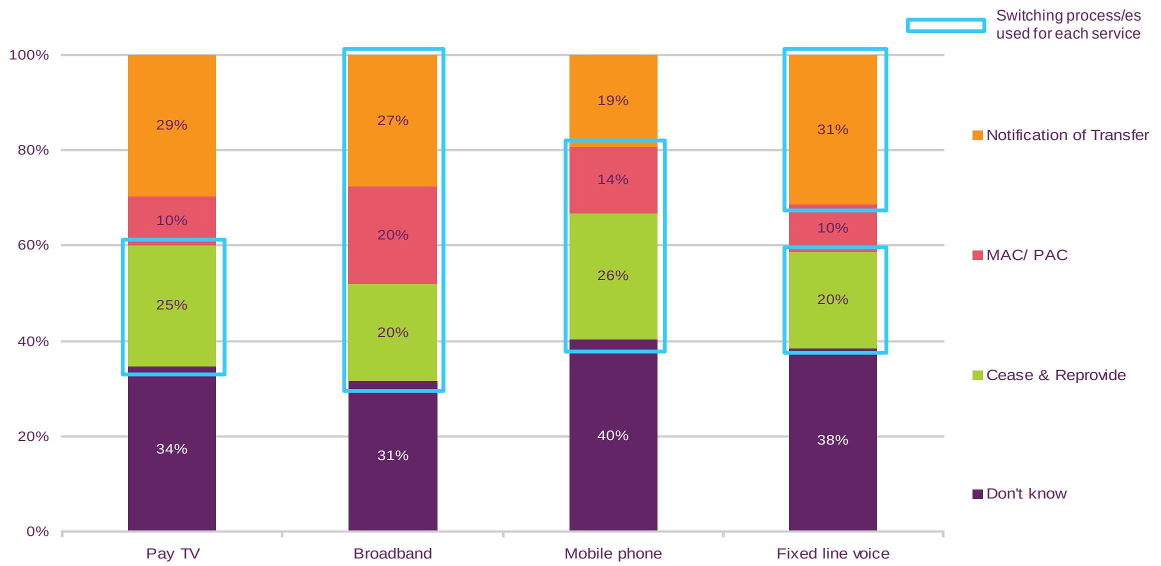
5.1 Many considering switching are unclear as to the process they would need to go through to switch provider

As mentioned earlier in section 3.2, the focus of this survey's investigation of the experience of considerers is the groups of decision makers have considered switching in the last 12 months, have at least looked into the process they would need to go through in order to change provider and do not expect to switch in the next three months.

Considerers were asked to refer to the descriptions of the three different switching processes (as detailed in Figure 3) and say which one of the three best describes the process they would need to go through to switch their service to another provider. Considerers were asked to select one process from a list showing all three of the switching processes. As detailed in Figure 8, just one process (C&R) is used to switch pay TV provider, two processes are used to change mobile provider (PAC and C&R) or fixed line voice provider (NoT and C&R) and all three (NoT, MAC and C&R) are used to switch fixed broadband provider.

Figure 26 shows the responses from considerers for each service, with blue boxes used to highlight the switching process or processes used for switching each of the services.

Figure 26: Awareness of relevant switching processes among considerers



QC4B-E – Which one of these best describes the process you would need to go through to switch your (SERVICE) to another supplier, as far as you know? (Prompted responses, single coded).
Base: All decision makers who have considered switching provider in the last 12 months (124 Pay TV, 242 Fixed broadband, 149 Mobile phone, 214 Fixed line voice)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

A significant minority of considerers do not know which process they would need to go through to switch to another provider; ranging from 31% for fixed broadband to 40% for mobile phone.

For the services where just one or two of the three processes are used, an additional group of considerers incorrectly identify the process they would need to go through to switch provider. Incorrect identification is most likely among those considering switching their pay TV service, which only has the C&R process available; with 29% incorrectly selecting the NoT process and 10% incorrectly selecting the MAC/ PAC process.

Both mobile and fixed line voice use two switching processes. Incorrect identification of the switching process among considerers is higher among mobile considerers; with 19% incorrectly identifying the NoT process compared to 10% of fixed line voice considerers incorrectly identifying the MAC/ PAC process.

Correct identification of the process needed to switch provider therefore accounts for 69% of fixed broadband considerers, 51% of fixed line voice considerers, 40% of mobile phone considerers and 25% of pay TV considerers.

When asked to nominate their reasons for deciding not to switch provider in the last year, very few considerers gave the reason that this was because they didn't know what process they would need to go through; ranging from 0% for pay TV considerers to 5% for fixed line voice switchers.

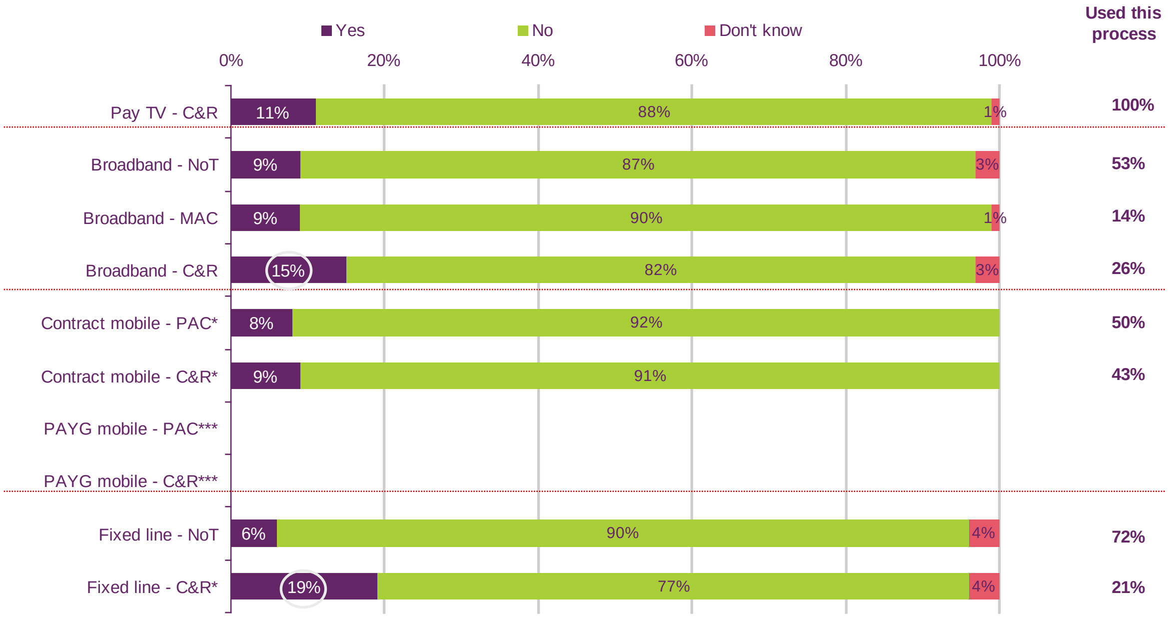
Few of the considerers interviewed as part of the qualitative stage had been in contact with any providers as part of their consideration process. Most expected that the process would be easy, but did not have a clear idea of how long the process would take. One considerer who was looking to move three standalone services to create a bundle assumed that this could be achieved through one call to the bundle provider.

> They'd basically do the whole thing you know. I don't think it should be that difficult at all.

5.2 Those switching fixed broadband or fixed line voice using C&R are more likely to have had to pay an early termination charge to leave their previous provider

All switchers were asked whether they needed to pay an early termination charge or cancellation charge to their previous provider in order to leave their contract. Figure 27 shows the incidence of paying an early termination charge by those using each of the different switching processes for each service.

Figure 27: Incidence of paying an early termination charge to the previous provider – by switching process used



QB30A-E – When you decided to switch to your new supplier, did you need to pay your previous supplier an early termination charge or cancellation charge in order to leave your contract with them?
Base: All decision makers who have switched last 12 months (108 Pay TV C&R, 161 Broadband NoT, 125 Broadband MAC, 109 Broadband C&R, 70 Contract mobile PAC, 73 Contract mobile C&R, 206 Fixed line NoT, 75 Fixed line C&R). Significance testing shows any difference between switching processes within each service. *Caution: Low base, ***Base too low for reporting
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

Those using C&R to switch their fixed broadband service are more likely to have paid an early termination charge (15% C&R vs. 9% NoT and 9% MAC). Similarly, those using C&R to switch their fixed line voice service are more likely to have paid an early termination charge (19% C&R vs. 6% NoT).

On combining the processes used across each of the services, those switching using C&R are the most likely to have paid an early termination charge (13% C&R vs. 9% MAC/ PAC vs. 7% NoT).

Across all of the services where the consumer had to pay an early termination charge, around one in ten (13%) said that they didn't know about the charge before they agreed to switch provider. There are insufficient interviews to look at this finding for any particular service or switching process.

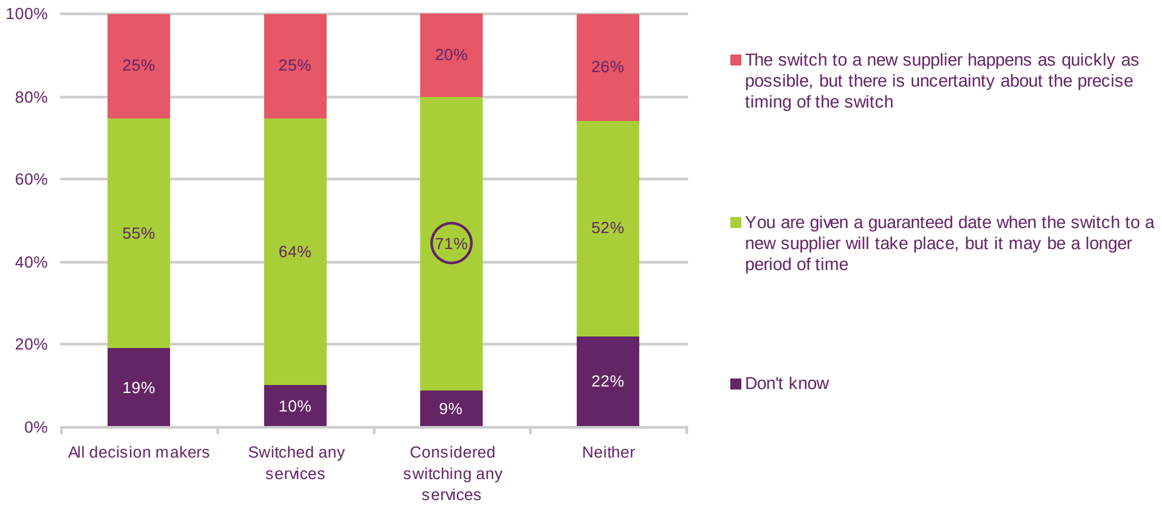
5.3 There is a preference for a guaranteed date for the switch over how quickly the switch will happen

All decision makers were asked to choose from two options to say which would be more important to them if they wanted to change provider:

- The switch to a new provider happens as quickly as possible, but there is some uncertainty about the precise timing of the switch
- You are given a guaranteed date when the switch to a new provider will take place, but it may be a longer period of time

Figure 28 shows the responses from all decision makers, those who have switched any services in the last year, those who have considered but not switched, and inactive consumers who have not considered switching any services in the last year.

Figure 28: Preference for speed or certainty of the switch – among all decision makers, switchers, considerers and inactive consumers



QD2 – If you wanted to change supplier, which one of these would be more important to you? (Prompted responses, single coded)
Base: All decision makers (2871)/ those who have switched provider in the last 12 months (925)/ those who have considered switching provider in the last 12 months (460)/ those who have neither switched nor considered switching (1551) . Significance testing shows any difference between those switching, considering or neither of these and all decision makers.
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

There is a clear preference for a guaranteed date of when the switch will happen over the speed of the switch across each of the three groups of decision makers. This preference is most evident among considerers, where a higher proportion prefers a guaranteed date compared to switchers and inactive consumers (71% considerers vs. 64% switchers and 52% inactive consumers). Inactive consumers are more likely than switchers and considerers to say they don't know which option would be their preference (22% inactive consumers vs. 10% switchers and 9% considerers).

6. Contact with providers

This section looks at the extent to which switchers found it difficult to get their previous provider to provide the information they needed to make the switch, the ease or difficulty of making contact with providers in order to make the switch, the experience of save activity among switchers and considerers, and whether those in contact felt put under pressure to stay. This section also looks at preferences for different save activity arrangements among switchers and considerers.

Key findings

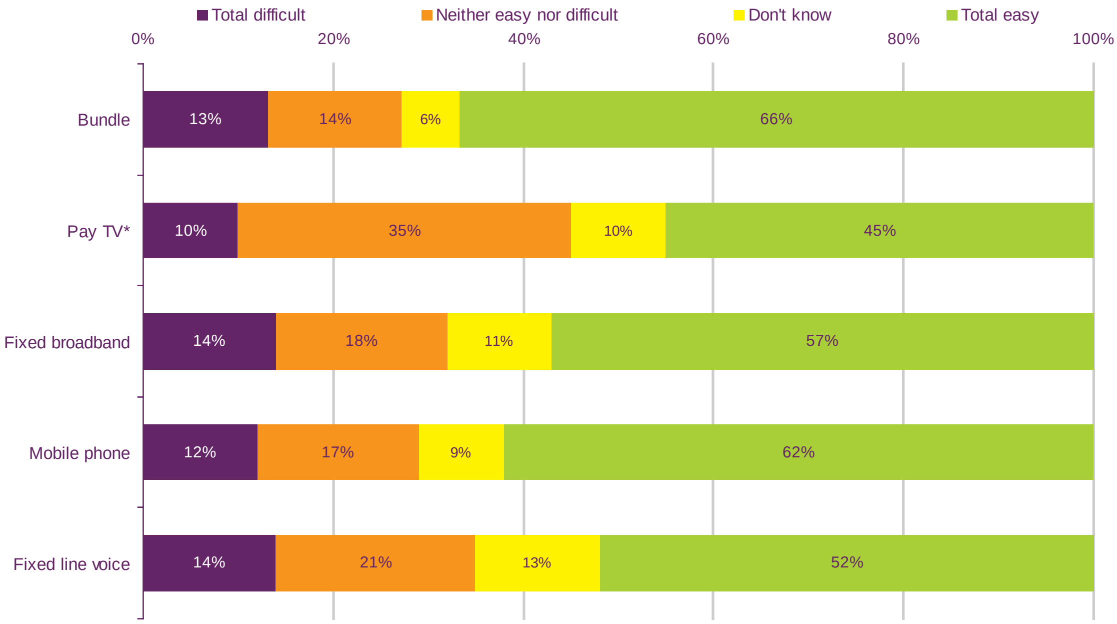
- At least one in ten switchers say it was difficult to get their previous provider to provide the information needed to be able to switch to another provider.
- Among fixed broadband switchers, those using MAC or C&R are more likely than those using NoT to say it was difficult to get this information from the previous provider. Among fixed line voice switchers, those using C&R are more likely than those using NoT to say it was difficult to get this information from the previous provider.
- Making contact with providers is more likely to be rated as difficult by those using C&R to switch fixed broadband or fixed line voice.
- A minority of those switching provider in the last 12 months listened to an offer to stay from their previous provider, through a combination of no offer being made and the switcher choosing not to listen to an offer from their previous provider.
- Those switching fixed broadband or fixed line voice, dominated by the NoT process led by the gaining provider, are the least likely to have experienced save activity on the part of the previous provider.
- Around one in ten switchers who were in contact with their previous provider about the switch say they felt put under pressure to stay.
- Among those who have considered switching to another provider in the last 12 months, a minority were in contact with their provider about their intention to switch.
- Where contact was made by considerers, around half experienced a save offer from their provider, with around four in five of these accepting the offer.
- Around one in five considerers who were in contact with their previous provider about the switch say they felt put under pressure to stay.
- Both switchers and considerers are more likely to prefer an opt-in system over an opt-out system for save activity.

6.1 At least one in ten switchers experience difficulties getting information from their previous provider

As mentioned in section 4.3, all decision makers who had switched provider in the last 12 months were presented with a series of aspects of the switching experience and were asked to use a scale to say how easy or difficult they had found each of these aspects. One of these aspects was ‘Getting your previous provider to provide you with the information that you needed to be able to switch to another provider’.

Figure 29 shows the difficulty ratings given to this aspect of switching from those switching each of the services concerned.

Figure 29: Difficulty of getting the previous provider to provide information needed to be able to switch – by service



QB12AG/BG/CG/DG/EG – How easy or difficult did you find … Getting your previous supplier to provide you with the information that you needed to be able to switch to another supplier. (Prompted responses, single coded)
Base: All decision makers who have switched in the last 12 months (125 Bundle, 87 Pay TV, 373 Fixed broadband, 341 Mobile phone, 216 Fixed line voice) *Caution: Low base
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

With the exception of pay TV, across each of the services a majority of decision makers rate the process of getting their previous provider to give them the necessary information to be able to switch as easy; ranging from 52% for fixed line voice to 66% for bundles. Pay TV switchers are more likely than those switching other services to give a neutral (neither easy nor difficult) rating, which has suppressed the more positive ratings from these switchers.

No group of switchers is more likely to rate the process of getting their previous provider to give them the necessary information to be able to switch as difficult. For each of the five services, at least one in ten give a difficult rating to this aspect; ranging from 10% for pay TV to 14% for fixed broadband and fixed line voice. Among fixed broadband switchers, difficult ratings are higher among those using the MAC and C&R processes compared to NoT (20% MAC and 19% C&R vs. 11% NoT). Similarly, among fixed line voice switchers, difficult ratings are higher among those using the C&R process compared to NoT (19% C&R vs. 12% NoT).

While most reported positive experiences, a number of the switchers and considerers interviewed as part of the qualitative stage mentioned issues they had encountered in trying to obtain the necessary information from their previous provider in order to be able to switch to a new provider.

I found it quite difficult as I had to go through like seven different people. They passed me around quite a few different people, but the final person I spoke to who actually gave me the PAC code was really helpful.

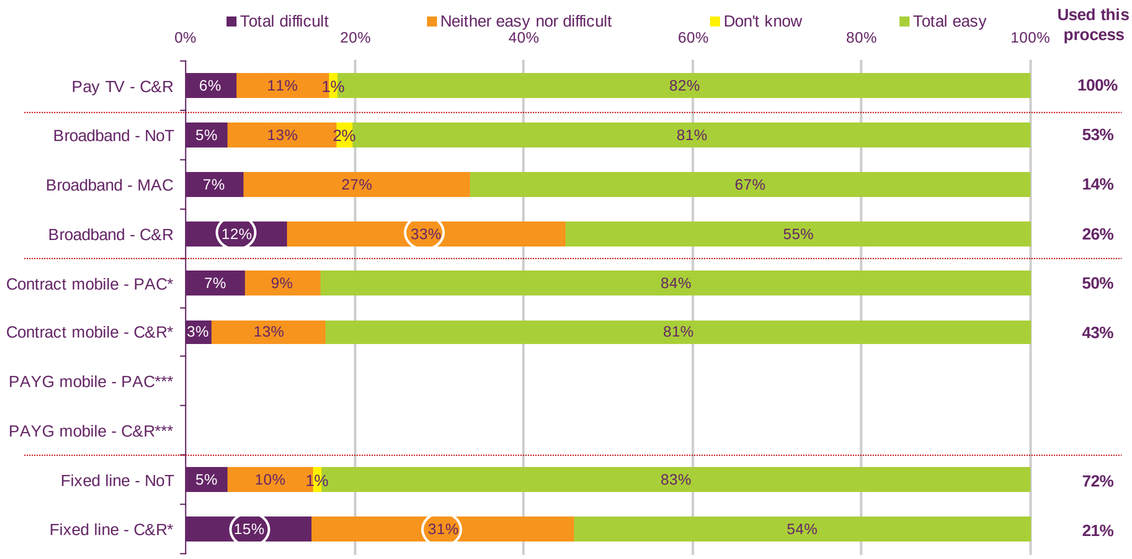
I wanted to get the MAC number and after 20 minutes waiting on the phone I just hung up. Then they fobbed me off to another number and it meant queuing all over again.

6.2 Those switching fixed broadband or fixed line voice using the C&R process have more difficulty contacting providers in order to make the switch

All decision makers who had switched providers in the last year were asked to refer to a scale to say how easy or difficult they had found the process of making contact with providers in order to make the switch. Responses to this question are shown earlier in Figure 9 having combined the responses from all those using the C&R process, the NoT process and the MAC or PAC processes.

Figure 30 compares the difficulty ratings given by those using each switching process to change providers for the different services, along with the incidence of switchers using each of these processes, to put these findings into context for each service.

Figure 30: Rating of difficulty of making contact with providers in order to make the switch – by service and switching process used



QB29A-E – How easy or difficult did you find the process of making contact with suppliers in order to make the switch? (Prompted responses, single coded)
Base: All decision makers who have switched in the last 12 months (130 Pay TV C&R, 161 Broadband NoT, 125 Broadband MAC, 109 Broadband C&R, 81 Contract mobile PAC, 74 Contract mobile C&R, 206 Fixed line NoT, 75 Fixed line C&R). Significance testing shows any difference between switching processes within each service. *Caution: Low base, ***Base too low for reporting
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

For each of the services a majority switchers rate the process of making contact with providers in order to make the switch as easy. However, those using the C&R process to switch fixed broadband provider are more likely than those using the other fixed broadband processes to rate this as difficult (12% C&R vs. 7% MAC and 5% NoT). Similarly, those using the C&R process to switch fixed line voice provider are more likely than those using the NoT process to rate this as difficult (15% C&R vs. 5% NoT).

6.3 C&R switchers are as likely to contact the previous supplier or the new supplier first once they have decided to switch

Those who switched provider using the C&R process were asked to say which provider they were in contact with first regarding the switch: their previous provider or their new provider. Figure 31 shows the responses from those using the C&R process across each of the four services.

Figure 31: Provider contacted first by C&R switchers

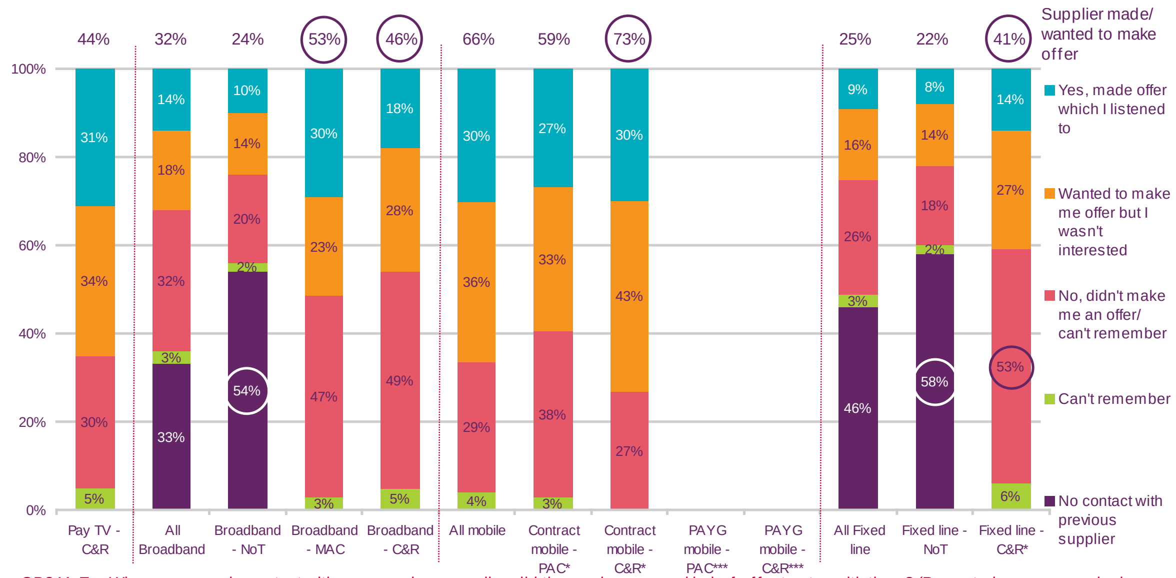
	Pay TV	Fixed broadband	Mobile phone	Fixed line voice
Previous provider	44%	50%	44%	56%
New provider	49%	40%	46%	40%
Can't remember	7%	9%	10%	4%

For each service, those switching using C&R are as likely to contact their previous provider or their new provider first once they decide to switch. C&R switchers who could remember which provider they contacted first were asked why they had first contacted that provider. The response 'To find out what I needed to do to make the switch' is equally likely to be given by those who first contacted the previous provider (51%) and those who first contacted the new provider (51%). The response 'To see what they could offer me' is, however, more likely to be given by those who first contacted the new provider (52%) than by those who first contacted the previous provider (26%).A minority of switchers who were in contact with their previous provider listed to an offer to stay

Those switching to another provider in the last 12 months who were in contact with their previous provider were asked whether that provider had made any kind of offer for them to stay. Where the provider had made an offer, switchers were asked to say if they listened to the offer or they weren't interested in listening.

Figure 32 shows whether contact was made with the previous provider and the incidence of a save offer being made to switchers using each of the different switching processes for each service, regardless of whether this was a standalone service or part of a bundle.

Figure 32: Experience of a save offer from the previous provider – by service and switching process



QB34A-E – When you were in contact with your previous supplier, did they make you any kind of offer to stay with them? (Prompted responses, single coded)
Base: All decision makers who have switched last 12 months (109 Pay TV C&R, 451 Total Broadband, 161 Broadband NoT, 125 Broadband MAC, 109 Broadband C&R, 212 Total Mobile, 70 Contract mobile PAC, 74 Contract Mobile C&R, 327 Total Fixed line, 206 Fixed line NoT, 75 Fixed line C&R).
Significance testing shows any difference between those using each switching processes and all switching that service. *Caution: Low base, ***Base too low for reporting
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

A majority of those using the NoT process to switch fixed broadband (54%) or fixed line voice (58%) said they were not in contact with their previous provider and so there was no experience of save activity for these switchers. For both fixed broadband NoT switchers (10%) and fixed line voice NoT switchers (8%) around one in ten listened to an offer from their previous provider. By contrast, around half of fixed broadband MAC (53%) and C&R (46%) switchers were made an offer from the previous provider, which they may or may not have chosen to listen to.

Among contract mobile switchers, those using the C&R process (73%) are more likely than those using the PAC process (59%) to have the opportunity to listen to a save offer. As already noted, C&R switchers for fixed line voice (41%) are more likely than those using NoT (22%) to have the opportunity to listen to a save offer.

Across the different services, mobile phone switchers are the most likely to experience a save offer (66%), followed by pay TV switchers (44%), and fixed broadband switchers (32%), with fixed line voice switchers the least likely to experience a save offer (25%).

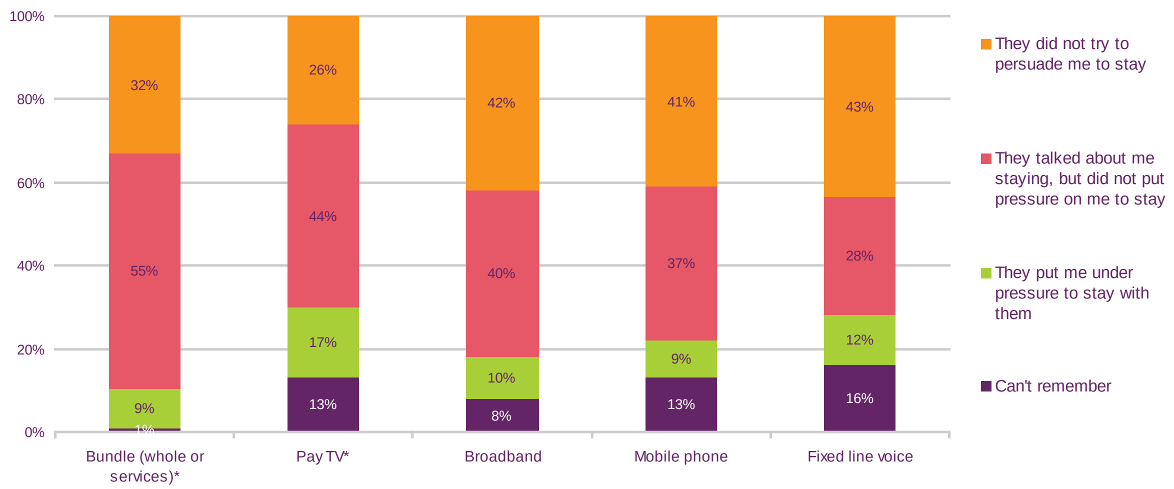
6.4 Around one in ten switchers in contact with their previous provider felt put under pressure to stay

Those switching to another provider in the last 12 months who were in contact with their previous provider were asked to choose a single response from three statements relating to the contact they had with their previous provider:

- They did not try to persuade me to stay
- They talked about me staying, but did not put pressure on me to stay
- They put me under pressure to stay with them

Feeling under pressure to stay with the previous provider may be a result of the switchers being told they won't do better elsewhere or that they couldn't leave their contract with the provider. Responses from those switching each of the four standalone services and those switching a whole bundle or services within a bundle are shown in Figure 33.

Figure 33: Experience of pressure to stay from previous provider – by service



QB39A-E – Which one of these statements best describes how you felt about the contact you had with your previous supplier?
Base: All decision makers who have switched provider in the last 12 months and had contact with their previous provider (80 Bundle, 63 Pay TV, 262 Fixed Broadband, 204 Mobile phone, 100 Fixed Line voice). Significance testing shows any difference one service and all other services. *Caution: Low base
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

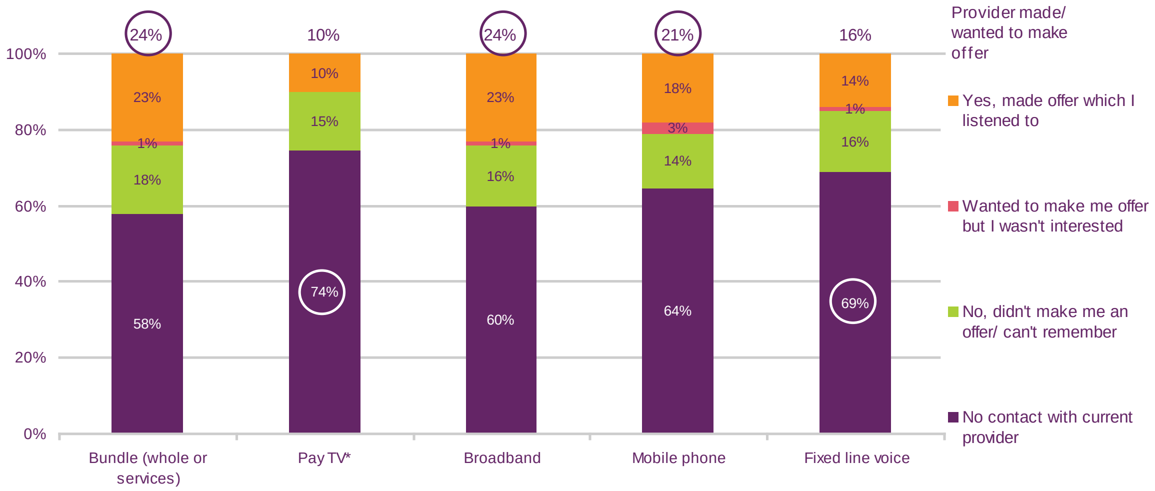
Among switchers who were in contact with their previous provider across the four standalone services and those with a bundle, around one in ten felt put under pressure to stay; ranging from

9% for bundle and mobile phone switchers to 17% for pay TV switchers. The base sizes available mean that the measures of pressure to stay across the services do not differ significantly. Combining responses across all of the services, the examples of pressure to stay that were mentioned by switchers include the supplier being persistent during the call and being told by the supplier they would not do better elsewhere.

6.5 A minority of considerers were in contact with their current provider about their intention to switch

Decision makers who have considered switching to another provider in the last year but did not switch and do not expect to switch soon were asked whether they had made contact with their current provider about their intention to switch. Those who had made contact with their provider were asked whether that provider had made any kind of offer for them to stay. Where the provider had made an offer, considerers were asked to say if they listened to the offer or they weren't interested in listening.

Figure 34: Experience of a save offer to considerers from the current provider – by service



QC27A-E – When you were in contact with your current supplier, did they make you any kind of offer to stay with them?
Base: All decision makers who have considered switching provider in the last 12 months and will not switch soon (114 Bundle, 63 Pay TV*, 134 Fixed broadband, 145 Mobile phone, 106 Fixed line voice) *Caution: Low base
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

For each of the services considered for switching in the last 12 months, a majority of considerers did not make contact with their current provider; ranging from 58% for bundle considerers to 74% for pay TV considerers. Where contact was made with the current provider, around half experienced a save offer from the provider, and around four in five of these accepted the offer. The low incidence of contact with the previous provider, however, means that experience of a save offer accounts for only around one in five considerers.

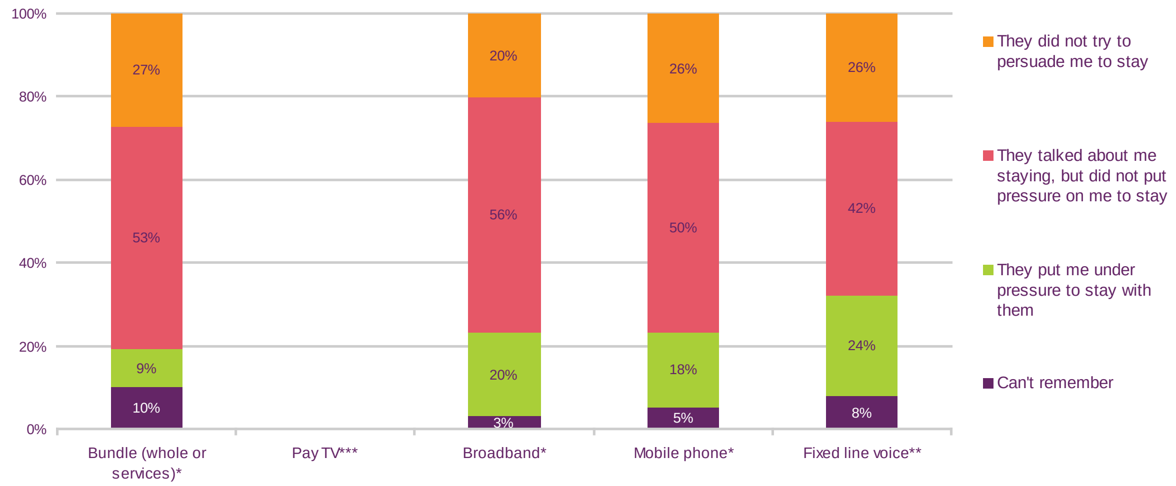
6.6 Around one in five considerers in contact with their current provider felt put under pressure to stay

Those considering switching to another provider in the last 12 months who were in contact with their provider were asked to choose a single response from three statements relating to the contact they had with their provider:

- They did not try to persuade me to stay
- They talked about me staying, but did not put pressure on me to stay
- They put me under pressure to stay with them

Feeling under pressure to stay with the provider may be a result of the considerers being told they won't do better elsewhere or that they couldn't leave their contract with the provider. Responses from those considering switching each of the standalone services and those switching a whole bundle or services within a bundle are shown in Figure 35.

Figure 35: Experience of pressure to stay from current provider – by service



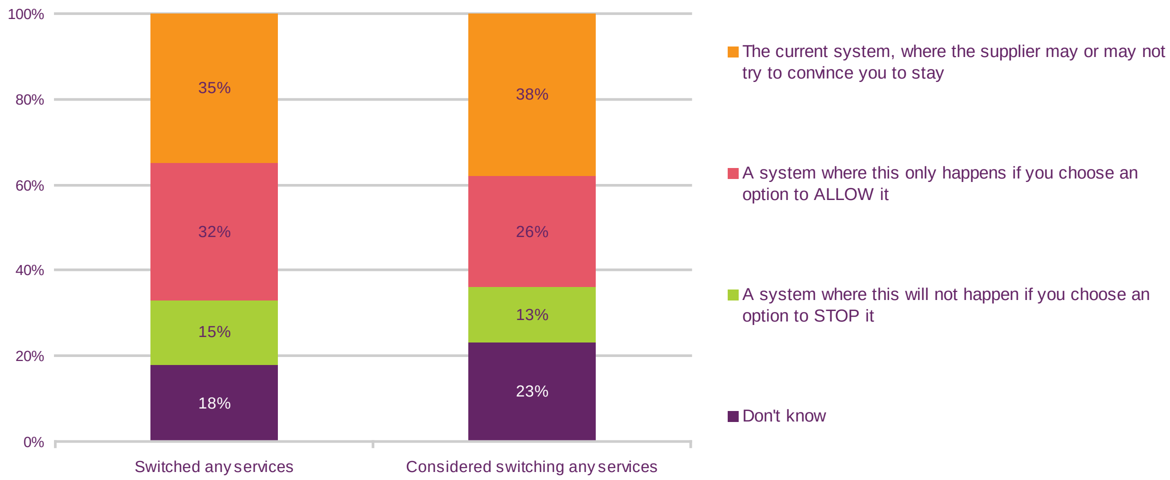
QC35A-E – Which one of these statements best describes how you felt about the contact you had with your current supplier?
Base: All decision makers who have considered switching provider in the last 12 months and had contact with their current provider (54 Bundle, 62 Fixed broadband, 61 Mobile phone, 39 Fixed line voice) *Caution: Low base, **Very low base, ***Base too low for reporting
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

Among considerers who were in contact with their provider across the three standalone services with a sufficient base size and those with a bundle, around one in five felt put under pressure to stay; ranging from 9% for bundle considerers to 24% for fixed line voice considerers. The base sizes available mean that the measures of pressure to stay across the services do not differ significantly. Combining responses across all of the services, the examples of pressure to stay that were mentioned by considerers include being told by the supplier they would not do better elsewhere and being told by the supplier it was not possible to leave their contract.

6.7 Among switchers and considerers there is a preference for an opt in system over an opt out system for save activity

Decision makers who had either switched or considering switching one of their services in the last 12 months were shown three options for save activity on the part of the losing provider and were asked to say which one they would prefer to decide whether a provider tries to convince a consumer to stay. Responses from switchers and considerers are shown in Figure 36.

Figure 36: Preference for save activity among switchers and considerers

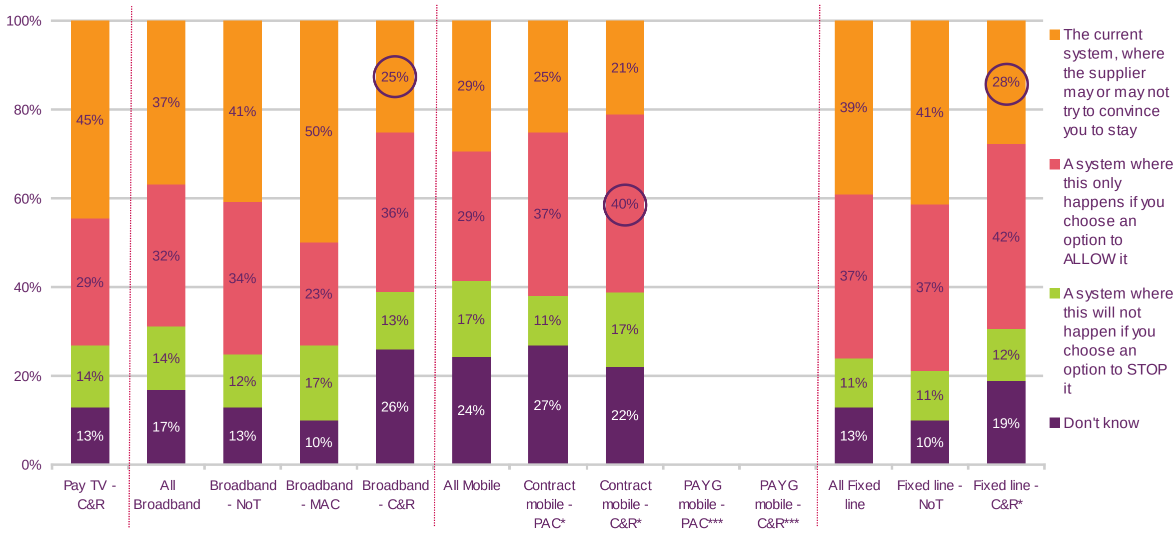


QD1 – Which one of these three systems would you prefer to decide whether a supplier tries to convince you to stay? (Prompted responses, single coded)
Base: All decision makers who have switched provider in the last 12 months (925)/ who have considered switching provider in the last 12 months (460)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

While none of the three options is preferred by a majority of either switchers or considerers, there is a preference for an opt-in system over an opt-out system among both switchers (32% vs. 15%) and considerers (25% vs. 13%).

Figure 37 looks at save activity preferences among switchers, detailing the responses from those using each switching process to change providers for the different services.

Figure 37: Preference for save activity among switchers – by switching process used



QD1 – Which one of these three systems would you prefer to decide whether a supplier tries to convince you to stay? (Prompted responses, single coded)
Base: All decision makers who have switched last 12 months (108 Pay TV C&R, 489 Total Broadband, 161 Broadband NoT, 125 Broadband MAC, 109 Broadband C&R, 351 Total Mobile, 70 Contract mobile PAC, 73 Contract Mobile C&R, 335 Total Fixed line, 206 Fixed line NoT, 75 Fixed line C&R).
Significance testing shows any difference between those using each switching processes and all switching that service. *Caution: Low base, ***Base too low for reporting
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

Across each of the switching processes used, none of the three options for save activity from the losing provider attracts a majority response. Those switching their fixed broadband or fixed line voice service using the C&R process are less likely than all switching these services to prefer the current system for save activity, where the provider may or may not try to convince the consumer to stay. Those switching their contract mobile provider using the C&R process are more likely than mobile switchers as a whole to prefer an opt-in process. As shown earlier in Figure32, mobile switchers using C&R are the most likely group to have experienced save activity from the losing provider when switching.

7. Slamming

7.1 2% of decision makers have experienced slamming for their communications services in the last 12 months

Decision makers were asked whether any of their phone, internet or TV services had been switched to another provider in the last 12 months without their express knowledge or consent. Across all decision makers, 2% have experience of this practice which is referred to as slamming. This overall incidence of slamming includes fixed broadband (1.3%), fixed line voice (1.0%), pay TV (less than 0.5%) and mobile phone services (less than 0.5%). Experience of slamming as a proportion of those decision makers with each service accounts for 2% for fixed broadband decision makers, 1.2% for fixed line voice decision makers and less than 0.5% for pay TV and mobile phone decision makers.

The actual number of decision makers with any experience of slamming in the last year totals 112 of all the respondents surveyed, and so there is limited scope for further analysis of this group.

For one in four (24%) of those with experience of slamming in the last 12 months this resulted in any additional costs to the decision maker. While numbers are very small, this appears to be more of an issue for those experiencing slamming for fixed broadband and fixed line voice and less of an issue for pay TV and mobile phone. The average additional spend among this group experiencing additional costs was £36.

In terms of its impact on propensity to switch in the future, experience of slamming is broadly as likely to have resulted in those who are now more likely (17%) as those who are now less likely (13%), with the remainder saying that slamming has made no difference (42%) or that they're unsure (27%).

8. Continuity of service

This section looks at the incidence of switchers experiencing an unwanted break with no service during the switching process and whether switchers had a period of paying more than one company to ensure continuity of service. These issues are also addressed for those considering switching in the last year; to establish whether considerers believed there was going to be an unwanted break with no service or a period paying more than one company.

Key findings

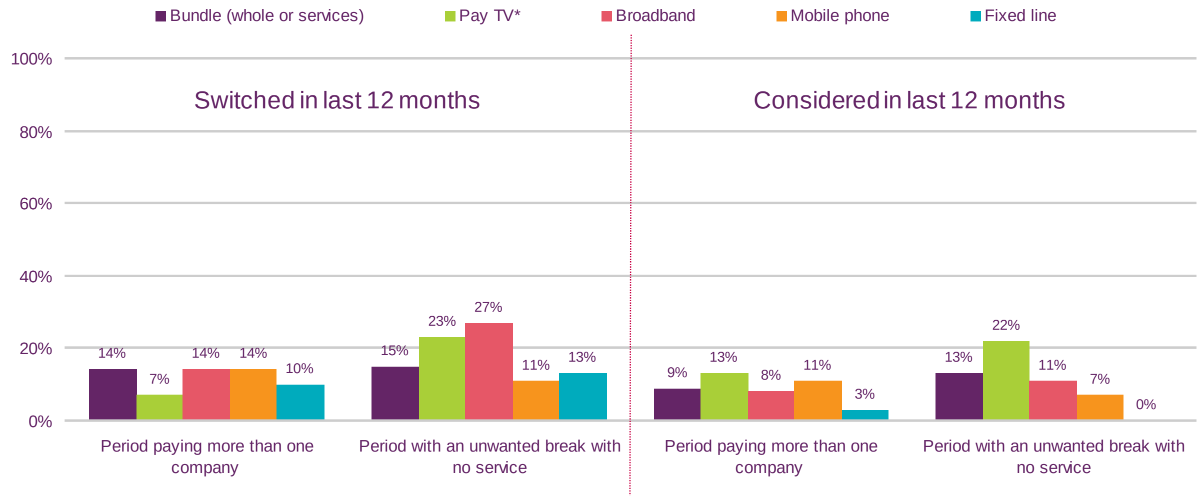
- Around one in four switching pay TV or fixed broadband in the last year experienced a period with an unwanted break with no service, with an average break of 12 days. While this is less likely for the other services, at least one in ten switching a bundle, fixed line voice or mobile provider experienced an unwanted break with no service.
- Around one in seven switching a bundle, fixed broadband service or mobile provider experienced a period paying more than one company to ensure continuity of service, and around one in ten switching pay TV or fixed line voice service. For these switchers, the average period paying more than one company is 12 days, with and average additional cost of £30.
- Those using the MAC process to switch fixed broadband and the C&R process to switch fixed line voice are more likely to have experienced paying more than one company to ensure continuity of service.
- Those using the C&R process to switch fixed broadband or to switch fixed line voice are more likely to have experienced an unwanted break with no service.

8.1 A significant minority of switchers experienced an unwanted break in service or a period paying more than one company to ensure continuity of service

Those switching a service in the last 12 months were asked whether there was a period of time in the switching process where they chose to or had to pay more than one company to provide a service to make sure they didn't lose that service. Switchers were also asked whether there was a period of time in the switching process where there was an unwanted break with no service from either the losing or gaining provider. Those considering switching a service in the last 12 months were asked whether they would have experienced a period of time paying more than one company or a period of time with no service as part of the switching process.

Figure 38 shows the overall picture for these continuity of service issues for both switchers and for considerers.

Figure 38: Paying more than one company or having an unwanted break in service as part of the switching process – among switchers and considerers



QB13A-E/ QB16A-E/ QC7A-E/ QC9A-E– Was there (going to be) a period of time in the switching process where you chose to or had to pay more than one company to provide a service to make sure you didn't lose that service?/ Was there (going to be) a period of time in the switching process where there was an unwanted break where you were not receiving a service from either company? (Prompted responses, multi-coded)
Base: All decision makers who have switched provider in the last 12 months (125 Bundle, 87 Pay TV, 373 Fixed broadband, 341 Mobile phone, 216 Fixed line voice), All decision makers who have considered switching provider in the last 12 months (114 Bundle, 63 Pay TV*, 134 Fixed broadband, 145 Mobile phone, 106 Fixed line voice) *Caution: Low base
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

Around one in four switching their pay TV (23%) or fixed broadband (27%) service in the last year experienced a period with an unwanted break with no service as part of the switching process. Experience of an unwanted break in service is less likely among those switching the other services, but still accounts for at least one in ten switching a bundle (15%), fixed line voice service (13%) or mobile provider (11%).

Those switching a bundle, mobile provider or fixed line voice service are broadly as likely to experience a period with an unwanted break in service as they are to experience a period paying more than one company to ensure no loss of service. Those switching pay TV or fixed broadband, however, are much more likely to experience an unwanted break than a period paying more than one company (23% vs. 7% for pay TV and 27% vs. 14% for fixed broadband).

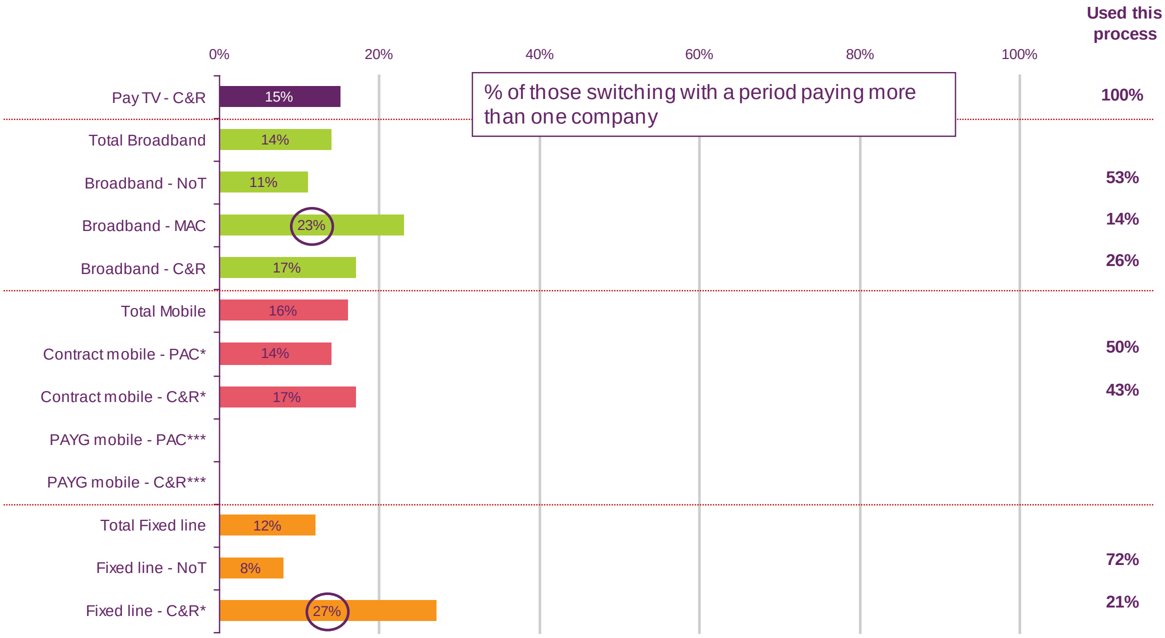
Across all switchers experiencing an unwanted break in service as part of the switching process, the average break is 12 days. Across all switching experiencing a period paying more than one company to ensure continuity of service, the average period is also 12 days with an average additional spend of £30.

Those considering switching their pay TV service in the last year are also more likely to say there was going to be an unwanted break than a period paying more than one company (22% vs. 13%), with other considerers broadly equally likely to say that either of the two continuity of service issues was going to happen as part of the switching process.

8.2 Those using the MAC process for fixed broadband and the C&R process for fixed line voice are more likely to have experience of paying more than one company to ensure continuity of service

Figure 39 shows the extent to which those switching provider in the last 12 months had a period where they paid more than one company to ensure continuity of service, detailing the responses from those using each switching process to change providers for the different services, whether as part of a bundle or as a standalone service.

Figure 39: Paying more than one company as part of the switching process – by switching process used



QB13A-E – Was there (going to be) a period of time in the switching process where you chose to or had to pay more than one company to provide a service to make sure you didn't lose that service?
Base: All decision makers who have switched last 12 months (109 Pay TV C&R, 451 Total Broadband, 161 Broadband NoT, 125 Broadband MAC, 109 Broadband C&R, 277 Mobile, 75 Contract mobile PAC, 73 Contract mobile C&R, 327 Total Fixed line, 207 Fixed line NoT, 75 Fixed line C&R).
Significance testing shows any difference between those using each switching processes and all switching that service. *Caution: Low base, ***Base too low for reporting
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

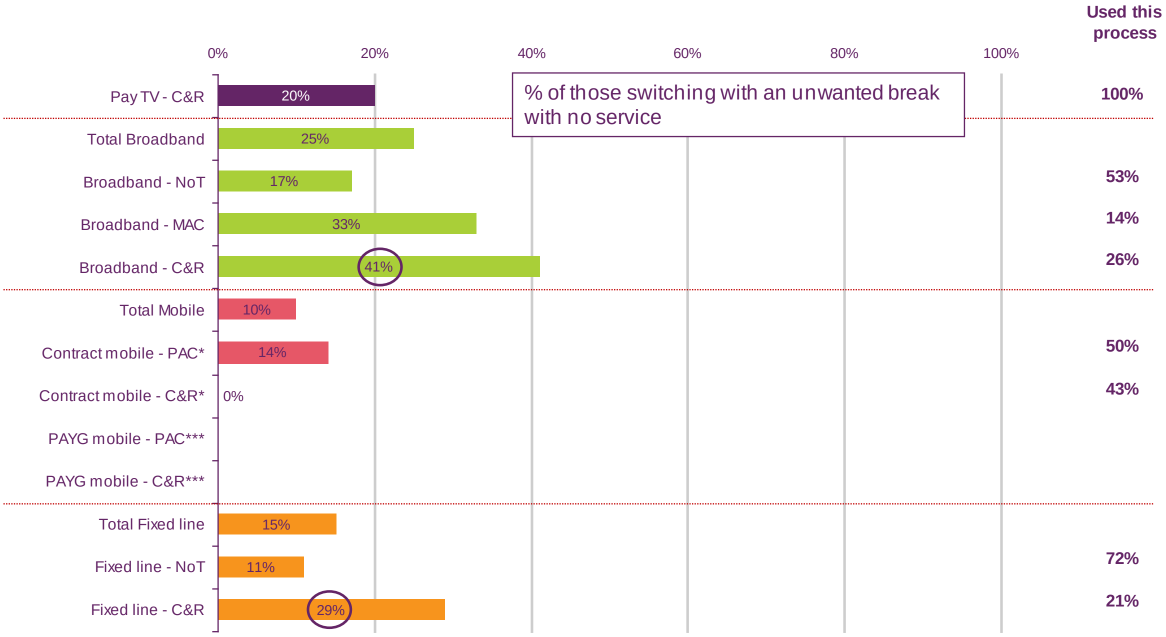
At an all-service level, there is little difference across the four communications services in terms of experience of having to pay more than one company to ensure continuity of service; ranging from 12% for fixed line voice to 16% for mobile phone switchers. Within the overall total of fixed line voice switchers, however, those using the C&R process are more likely to have paid more than one company (27% vs. 12% of all fixed line voice switchers) and this difference is also evident for those using the MAC process to switch fixed broadband provider (23% vs. 14% of all fixed broadband switchers).

With the MAC process, the providers should be managing when the services stop and start: in this way making the switch a seamless process. Around one in five switching using MAC were also switching other services in a bundle at the same time, which may explain some of those experiencing a period paying more than one company. From the qualitative research, some switchers reported paying more than one company through having an obligation to pay the losing provider to the end of the month , with some of these subsequently getting a rebate or refund.

8.3 Those using the C&R process for fixed broadband or fixed line voice are more likely to have experience of an unwanted break in service

Figure 40 shows the extent to which those switching provider in the last 12 months had a period where they paid more than one company to ensure continuity of service, detailing the responses from those using each switching process to change providers for the different services, whether as part of a bundle or as a standalone service.

Figure 40: Unwanted break in service as part of the switching process – by switching process used



QB16A-E –Was there (going to be) a period of time in the switching process where there was an unwanted break where you were not receiving a service from either company?
Base: All decision makers who have switched last 12 months (109 Pay TV C&R, 451 Total Broadband, 161 Broadband NoT, 125 Broadband MAC, 109 Broadband C&R, 277 Mobile, 75 Contract mobile PAC, 73 Contract mobile C&R, 327 Total Fixed line, 207 Fixed line NoT, 75 Fixed line C&R).
Significance testing shows any difference between those using each switching processes and all switching that service. *Caution: Low base, ***Base too low for reporting
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

At an all-service level, there is considerable difference across the four communications services in terms of experience of an unwanted break in services as part of the switching process; ranging from 10% for mobile phone to 25% for fixed broadband switchers. Those using the C&R process to switch their fixed broadband (41%) or fixed line voice service (29%) are more likely than all fixed broadband (25%) or all fixed line voice switchers (15%) to have experienced an unwanted break in service.

While those switching using C&R for fixed broadband or fixed line voice are more likely than others to have experienced an unwanted break in service, some of those using NoT or MAC/ PAC also experienced an unwanted break in service. Some of these switchers were also switching other services in a bundle at the same time, which may explain some of those experiencing a period with an unwanted break. From the qualitative research, some fixed broadband switchers reported a delay in starting the new service through broadband services being 'down' or a delay in the transfer of their telephone number.

9. Email addresses

This section looks at the extent to which fixed broadband switchers and considerers use an email address from their broadband provider, whether these consumers wanted to continue to use this email address, and whether they experienced any difficulties in doing so

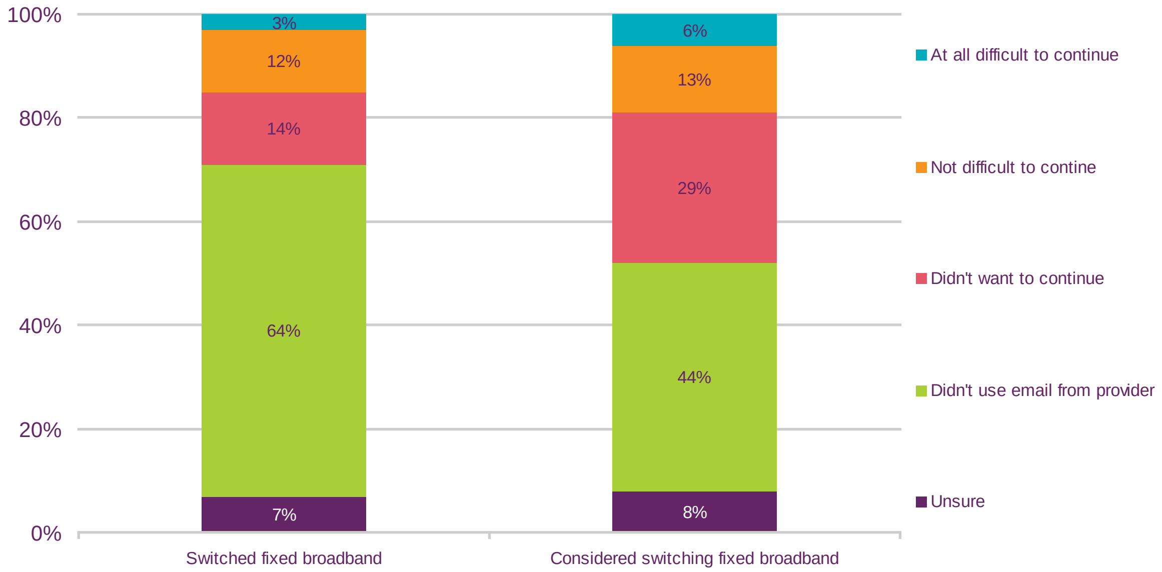
Key findings

- One in five or fewer fixed broadband switchers or considerers used and wanted to continue to use an email address from their broadband provider.
- Experience of any difficulties in continuing to use the email address when switching or considering switching accounts for just 3% of switchers and 6% of considerers.
- Those aged 55 and over and those in C1 socio-economic groups are more likely to use an email address from their broadband provider. Those aged 55 and over are more likely to have experienced difficulties continuing to use their email address; accounting for 7% in this age group.

9.1 A minority of fixed broadband switchers and considerers want to move an email address from their previous broadband provider when they switch and few experience any difficulties

Those decision makers who had switched or considered switching their fixed broadband service in the last 12 months were asked a series of questions to understand whether they used an email address from their broadband provider, whether the wanted to continue to use this address after switching provider and whether it was at all difficult to continue to use this email address. Figure 41 shows responses to this series of questions from all fixed broadband switchers and considerers.

Figure 41: Interest in and experience of continuing to use email address from broadband provider when switching – among switchers and considerers



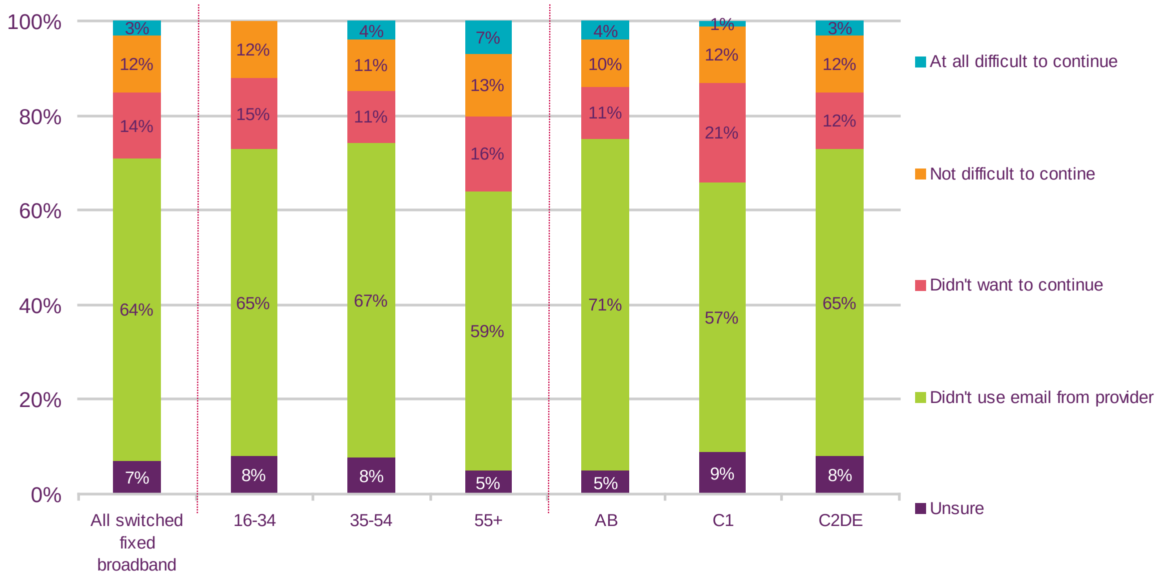
QB22/23/25/ QC14/15/17 – Did/ Do you use an email address from your broadband provider?/ Did you want to continue to use the email address when you changed provider? How easy or difficult did you find this? (Prompted responses, single coded)
Base: All decision makers who have switched broadband provider in the last 12 months (489)/ who have considered switching broadband provider in the last 12 months (242)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

A majority of fixed broadband switchers (64%) and close to half of fixed broadband considerers (44%) do not use an email address from their broadband provider. In addition, a significant proportion of switchers (14%) and considerers (29%) did not want to continue to use an email address from their broadband provider. This is therefore not an issue for these consumers, accounting for 78% of switchers and 73% of considerers.

Just 15% of fixed broadband switchers and 19% of fixed broadband considerers used and wanted to continue to use the email address from their provider. The proportion encountering any difficulties in continuing to use the email address accounts for only 3% of fixed broadband switchers and 6% of fixed broadband considerers.

Figure 42 looks in more detail at this issue among fixed broadband switchers, comparing responses from those in different age groups and socio-economic groups.

Figure 42: Interest in and experience of continuing to use an email address from broadband provider when switching – among switchers, by age and socio-economic group



QB22/23/25 – Did you use an email address from your broadband provider?/ Did you want to continue to use the email address when you changed provider? How easy or difficult did you find this? (Prompted responses, single coded)
Base: All decision makers who have switched broadband provider in the last 12 months (489 aged 16+, 169 aged 16-34, 181 aged 35-54, 139 aged 55+, 169 AB, 155 C1, 165 C2DE)
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

Fixed broadband switchers aged 55 and over and those in the C1 socio-economic group are more likely than other switchers to have used the email address from their fixed broadband provider; accounting for 36% of those aged 55 and over and 34% of those in C1 socio-economic group compared to 29% of all fixed broadband switchers. There is therefore more potential for the ability to continue using an email address from their fixed broadband provider to be an issue for these groups of switchers. As with all fixed broadband switchers, a significant proportion did not want to continue using the email address among those aged 55 and over (16%) and those in the C1 socio-economic group (21%).

20% of those aged 55 and over and 13% of those in the C1 socio-economic group used and wanted to continue to use the email address from their provider. The proportion encountering any difficulties in continuing to use the email address accounts for 7% aged 55 and over and 1% of those in the C1 socio-economic group. This higher incidence of difficulty among older adults is not significantly higher than the measure for all fixed broadband switchers (3%), but it does appear that issues are more prevalent among older switchers.

10. Impact of experience

This section looks at the impact of the experience of switching or considering switching on propensity to change provider in the future.

Key findings

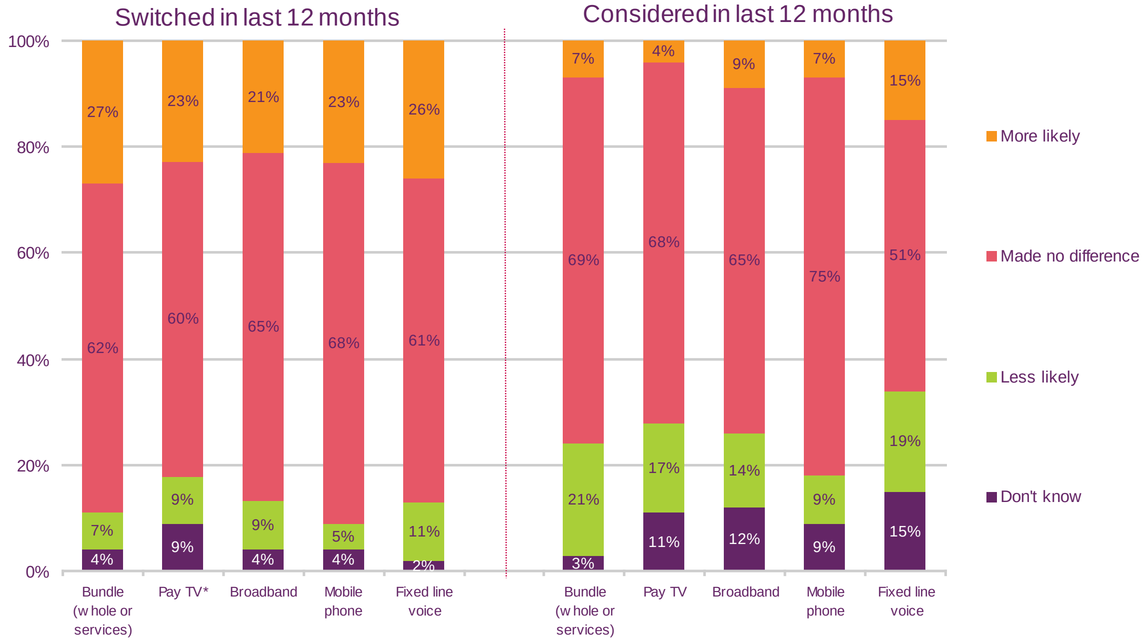
- At least six in ten switchers say their experience has made no difference to their propensity to switch in future, with most of the remainder saying that they are now more likely to switch in future.
- Switchers who say they are now less likely to switch in future account for around one in ten or fewer of all switchers.
- The proportion of considerers who say they are now less likely to switch in future is higher than among switchers; accounting for between one in ten and one in five of all considerers.
- Switchers who used the NoT or MAC/ PAC process are more likely to switch in future compared to those using C&R. Intentions among those switching using MAC and those switching using PAC do not differ significantly.

10.1 Most switchers and considerers say their experience has made no difference or made it more likely that they will switch in the future

All decision makers who had switched any services in the last 12 months and those who had considered switching were asked to say whether their overall experience of the process has made them more likely or less likely to change provider in future, or whether it had made no difference. Please note that stated intentions do not necessarily reflect actual subsequent behaviour. While the responses from decision makers should not be interpreted as absolute levels of future switching behaviour, it is possible to compare the relative levels across the services and switching processes.

Responses from those switching or considering switching a bundle or any of the four standalone services are shown in Figure 43.

Figure 43: Impact of experience on propensity to switch in the future – among switchers and considerers, by service



QB43A-E/ QC37A-E – If you were thinking about changing supplier for your (SERVICE) in the future, has your overall experience of the process made you more likely or less likely to make this change, or has it made no difference? (Prompted responses, single coded)
Base: All decision makers who have switched provider in the last 12 months (125 Bundle, 87 Pay TV, 373 Fixed broadband, 341 Mobile phone, 216 Fixed line voice), All decision makers who have considered switching provider in the last 12 months (114 Bundle, 63 Pay TV, 134 Fixed broadband, 145 Mobile phone, 106 Fixed line voice) *Caution: Low base
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

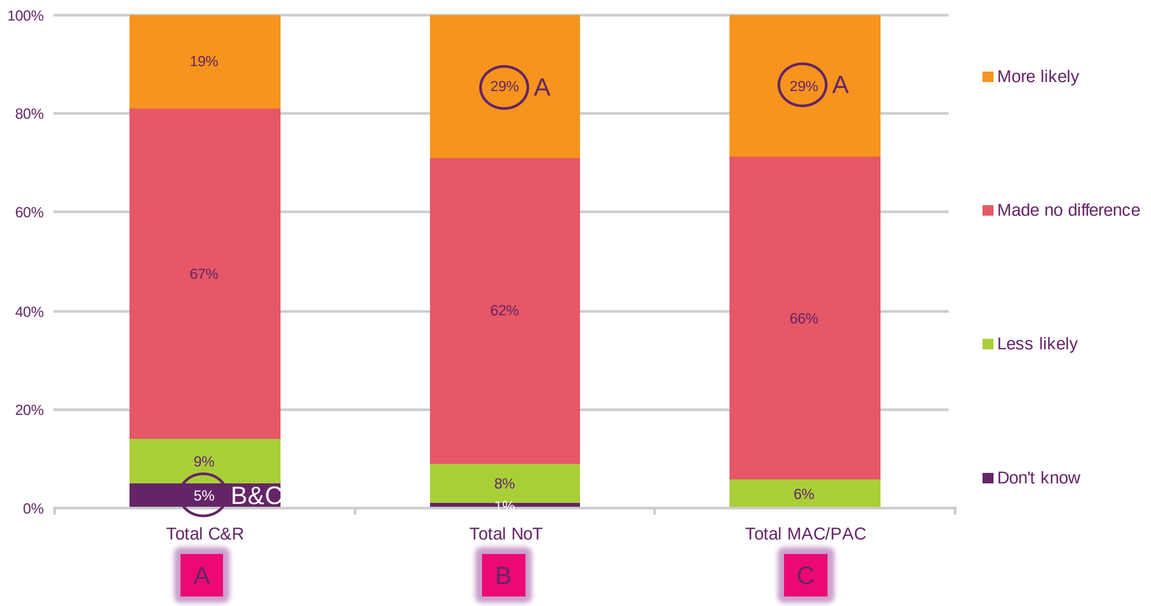
Among switchers, a majority say that their experience has made no difference to their propensity to switch in future; ranging from 60% for pay TV to 68% for mobile phone. Most of the remainder, say that their experience has made them more likely to switch in future; ranging from 21% for fixed broadband to 27% for those switching a bundle. Switchers who say they are now less likely to switch in future therefore account for one in ten or fewer of all switchers; ranging from 5% for mobile phone to 11% for fixed line voice.

Among considerers being less likely to switch in future as a result of the experience of considering switching is more evident, compared to those who actually switched. Between one in ten and one in five considerers say they are now less likely to switch in future; ranging from 9% for mobile phone to 21% for those considering switching all or some of the services in a bundle. It is not necessarily the case that this significant minority of considerers saying they are now less likely to switch is an indication of a negative experience. As shown earlier, a key reason for not switching among considerers is that the decision maker judges that there is no benefit in moving.

10.2 Switchers using NoT or MAC/PAC processes are more likely to switch in future than those using C&R

Figure 44 combines the propensity to switch responses from those switchers using the C&R process (labelled 'A') across each of the four communications services, those switchers using the NoT process (labelled 'B') across fixed broadband and fixed line voice, and those switchers using the MAC or PAC process (labelled 'C') across fixed broadband and mobile phone.

Figure 44: Impact of experience on propensity to switch in the future – by switching process used across all services



QB43A-E– If you were thinking about changing supplier for your (SERVICE) in the future, has your overall experience of the process made you more likely or less likely to make this change, or has it made no difference? (Prompted responses, single coded)
Base: All decision makers who have switched in the last 12 months using C&R (387), NoT (367), MAC/ PAC (237). Significance testing shows any difference across switching processes
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

While none of the switching processes has a higher proportion of switchers less likely to switch in the future, the C&R process has a lower proportion more likely to switch in the future (19% C&R vs. 29% Not and 29% MAC/ PAC). The overall measure shown in Figure 38 for MAC/ PAC of 29% saying they are now more likely to switch in future can be split between the two processes: with 27% now more likely for MAC users and 30% now more likely for PAC users. These measures do not differ from each other significantly.

11. Bundled services

This section looks at the incidence of decision makers holding a bundle of services; through receiving one bill covering more than one service from the same provider. It also looks at the demographic groups more likely and less likely to hold a bundle of services. It covers the key reasons for deciding to take a bundle and the extent to which bundle consumers start using a service for the first time on taking a bundle. Comparisons are made between bundle consumers and those with standalone services in terms of their overall satisfaction with service, their experience of dealing with customer services and satisfaction with value for money.

Key findings

- Half of all decision makers have a bundle of communications services.
- The youngest and oldest consumers and those in lower income households are less likely to have a bundle of services.
- Cost savings are the key reason for taking a bundle, followed by convenience.
- Close to half of those with pay TV or fixed broadband in their bundle did not hold these services before they held their current bundle, while half or more of those with mobile phone or fixed line voice in their bundle switched these services from another provider.
- Services held in a bundle are relatively unlikely to have been previously held in a bundle with another provider.

11.1 Half of all decision makers have a bundle of communications services

As detailed in section 3.1, the qualifying questions established which of the four communications services of interest were in the household and which provider is used for each service. Those receiving one bill covering more than one service from the same provider were classified as having a bundle of services. Figure 45 shows the overall incidence of bundles and standalone services.

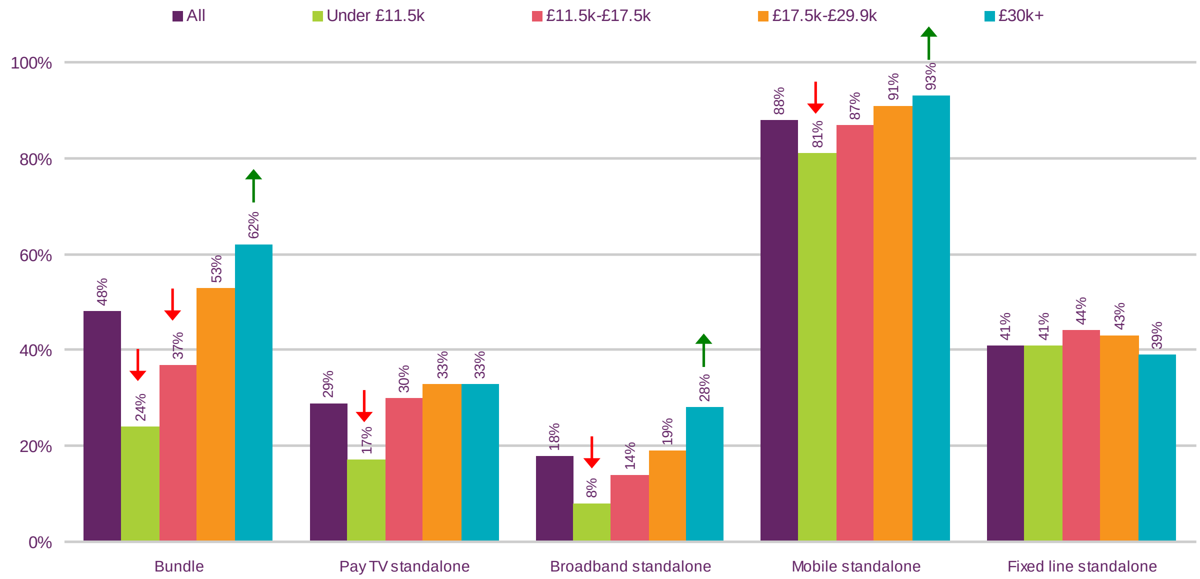
Figure 45: Incidence of service bundles and standalone services, by age of decision maker

QA1/ QA6/ QA7/ QA7A/ QA8 – Which of these services are in your household?/ Which supplier do you use for [SERVICE]?/ Do you receive one bill or separate bills for your [SERVICES]?/ To confirm, which services do you receive covered by a single bill from that supplier?/ Do you get these services as a package or as separate services?
Base: All respondents (2871 aged 16+, 826 aged 16-34, 536 aged 35-44, 496 aged 45-54, 466 aged 55-64, 547 aged 65+). Significance testing shows any difference between those in a particular age group with a service and all decision makers with that service.
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

While half (48%) of all decision makers have a bundle of services, this is less likely among decision makers aged 16-34 (44%) and those aged 65 and over (32%), and more likely among those aged 35-44 (58%) and aged 45-54 (59%). Older decision makers aged 65 and over are more likely than all decision makers to hold their fixed line voice services as a standalone service (68% vs. 41%).

The incidence of service bundles also varies by household income, as shown in Figure 46.

Figure 46: Incidence of service bundles and standalone services, by household income of decision maker



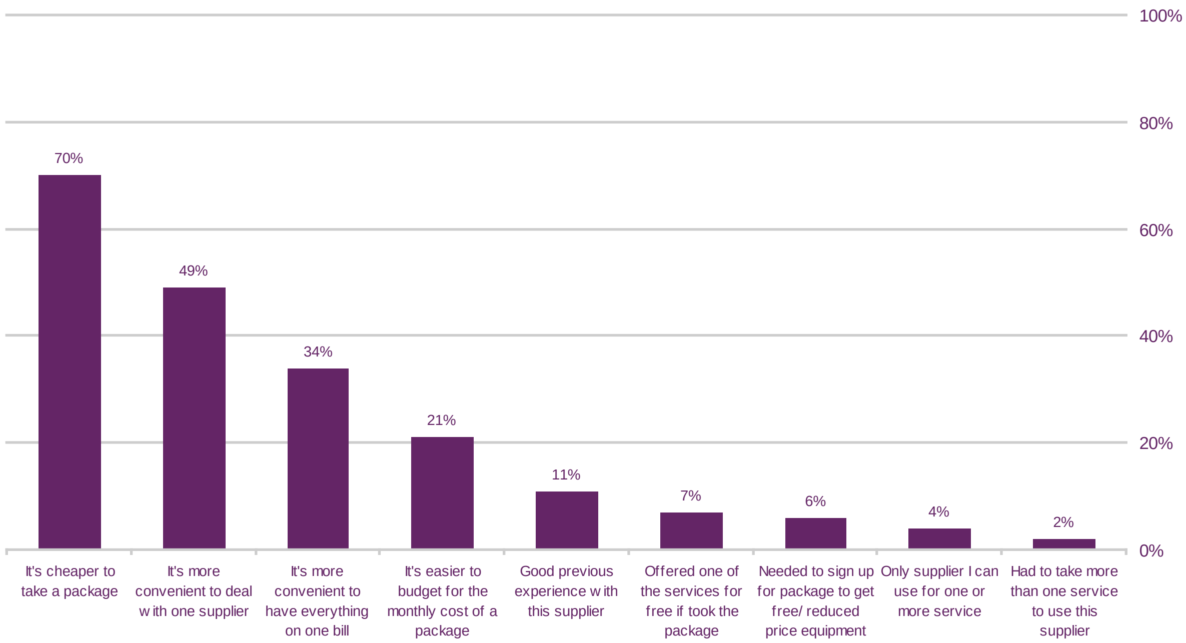
QA1/ QA6/ QA7/ QA7A/ QA8 – Which of these services are in your household?/ Which supplier do you use for [SERVICE]?/ Do you receive one bill or separate bills for your [SERVICES]?/ To confirm, which services do you receive covered by a single bill from that supplier? /Do you get these services as a package or as separate services?
Base: All respondents (2871 aged 16+, 397 Under £11.5K, 300 £11.5k-£17.5K, 482 £17.5K-£29.9K, 715 £30K+). Significance testing shows any difference between those in a particular income group with a service and all decision makers with that service.
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

Bundles are less likely to be held by decision makers in households with an annual income of under £11,500 (24%) or £11,500 to £17,500 (37%), compared to all decision makers (48%). Those in households with an annual income of £30,000 or over are more likely to have a bundle of services (62% vs. 48% of all).

11.2 Cost savings are the key reason for taking a bundle

All decision makers with a bundle of services were asked to refer to a list of possible reasons for deciding to take a bundle of services rather than separate services and then choose which reasons were important to them. Figure 47 shows the reasons chosen by all bundle consumers and those with each of the four specific bundle types.

Figure 47: Reasons for deciding to take a bundle of services



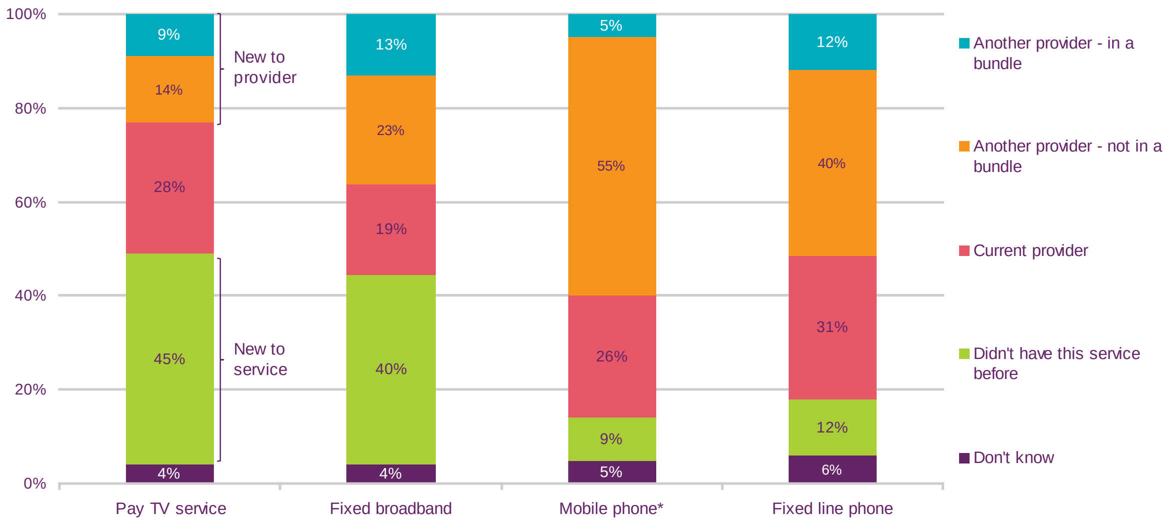
QA19 – Which, if any, of these were important in your decision to take a package of services rather than take these services separately?
Base: Those who receive a bundle of services for which they receive one bill (1424).
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

Most (70%) decided to take a bundle rather than separate services because of the cost savings. The other key reasons given by at least one in four of all with a bundle relate to convenience: it's more convenient to deal with one provider (49%) and that it's more convenient to have everything on one bill (34%).

11.3 Many with pay TV or fixed broadband in their bundle are new to these services

Those with a bundle of services were asked to refer to a list of options to say whether they had previously held each service in the bundle with the current provider, another provider (and whether this was in a bundle or not) or whether they didn't have this service before having the bundle of services. Figure 48 shows the responses from all bundle holders with each of the four types of services currently in a bundle.

Figure 48: Previous provider used for services in the bundle



QA17B/C/E – Who did you use for your [SERVICE] before you had your package of services with [SUPPLIER]?
Base: Those who receive a bundle of services for which they receive one bill (725 with Pay TV in bundle, 1338 with Fixed broadband in bundle, 74 with mobile phone in bundle, 1295 with Fixed line phone in a bundle)
NB: *Low base for mobile phone in a bundle; treat as indicative only
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

The previous provider used for the different services now held in a bundle varies considerably across the services. Around half of those with pay TV (45%) or with fixed broadband (40%) in a bundle are new to these services, having not previously held the service. It is relatively uncommon for bundle holders to be new to having a mobile phone (9%) or fixed line voice (12%) service.

Over half of those with a mobile phone (60%) or fixed line voice (52%) in a bundle have moved these services from another provider, with by far the majority of these moving mobile phone (59%) or fixed line voice (40%) having held these as standalone services with another provider.

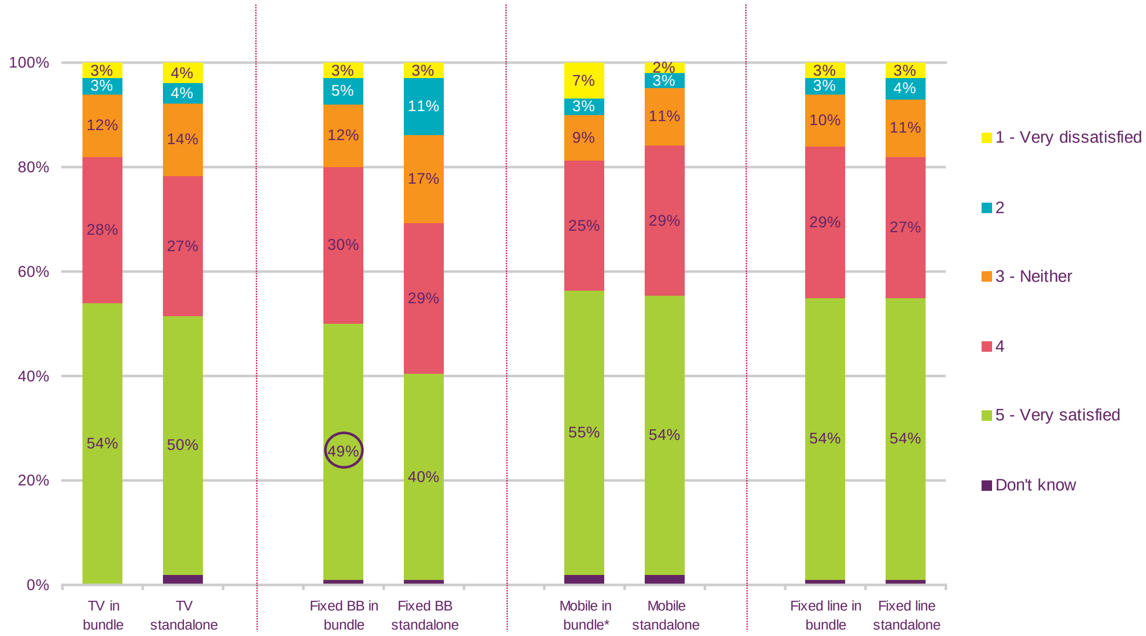
A significant minority of bundle holders already held the service with their current provider before having the bundle currently held; accounting for 31% for those with fixed line voice in a bundle, 28% for pay TV, 26% for mobile phone and 19% for fixed broadband.

As detailed earlier in section 3.1, there is a higher incidence of switching individual services within or to a bundle of services (13%) than switching the whole bundle of services (3%) in the last year. This is reflected in the detail of Figure 48, which shows that around one in ten with each type of service in a bundle previously held that service in a bundle with another provider; from 5% for mobile phone to 13% for fixed broadband.

11.4 Greater satisfaction with value for money among decision makers with a bundle for each service

All decision makers were asked to refer to a scale to say how satisfied they are with a number of service aspects for each communications service they currently have. Figure 49 details satisfaction with the overall service provided; comparing the responses from those with the service as part of a bundle and those with the service as a standalone service.

Figure 49: Satisfaction with the overall service provided – among bundle consumers and standalone service consumers

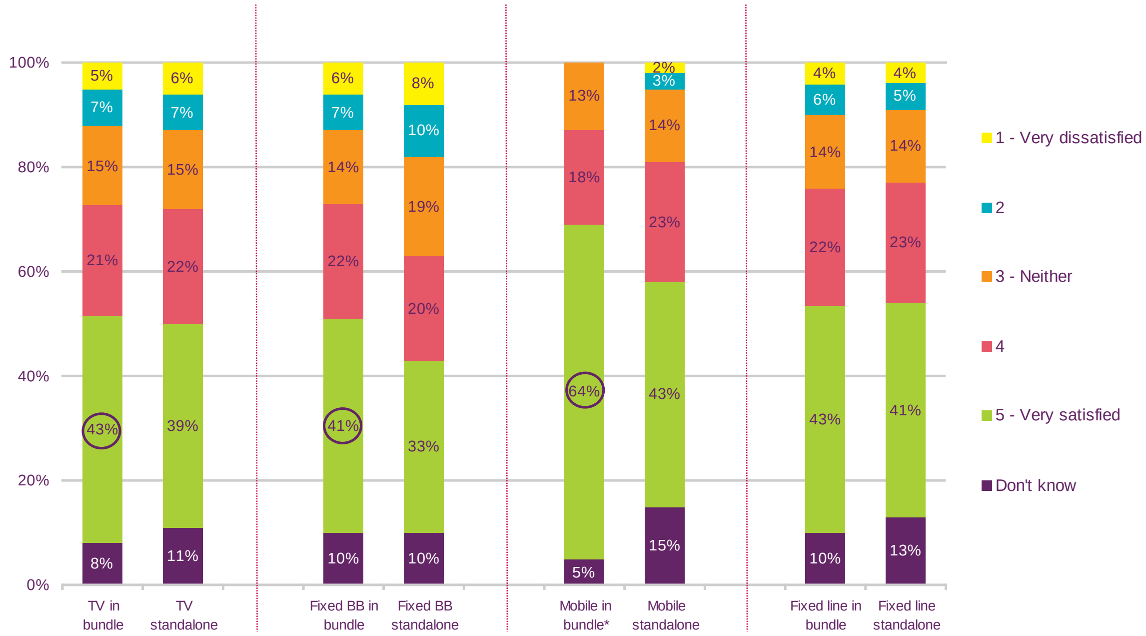


QA21B-E – How satisfied are you with the overall service provided for your [SERVICE]?
Base: All respondents with each service (725 TV in a bundle, 996 TV standalone, 1338 fixed broadband in bundle, 714 fixed broadband standalone, 74 mobile in bundle, 2256 mobile standalone, 1295 fixed line in bundle, 1214 fixed line standalone) . *Caution: Low base. Significance testing shows any difference between those with a service in a bundle and those with a standalone service.
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

The majority of decision makers for each service are satisfied with the overall service provided. For pay TV, mobile phone and fixed line voice services, satisfaction does not vary between those with the service in a bundle and those with a standalone service. For fixed broadband consumers, however, those with the service in a bundle are more likely to be very satisfied with the overall service provided (49% vs. 40%).

Figure 50 details satisfaction with the experience of dealing with customer services; comparing the responses from those with the service as part of a bundle and those with the service as a standalone service.

Figure 50: Satisfaction with dealing with customer services – among bundle consumers and standalone service consumers



QA22B-E – How satisfied are you with your experience of dealing with the customer services for your [SERVICE]?
Base: All respondents with each service (725 TV in a bundle, 996 TV standalone, 1338 fixed broadband in bundle, 714 fixed broadband standalone, 74 mobile in bundle, 2256 mobile standalone, 1295 fixed line in bundle, 1214 fixed line standalone) . *Caution: Low base. Significance testing shows any difference between those with a service in a bundle and those with a standalone service.
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

Those with services in a bundle are more likely to be very satisfied than those with standalone services for mobile phone (64% vs. 43%), pay TV (43% vs. 39%) and fixed broadband (41% vs. 33%). Fixed live voice is therefore the exception; with a similar proportion of bundle and standalone consumers (43% and 41%) saying they are very satisfied with their experience of dealing with customer services.

Figure 51 details satisfaction with value for money; comparing the responses from those with the service as part of a bundle and those with the service as a standalone service.

Figure 51: Satisfaction with value for money – among bundle consumers and standalone service consumers

QA23B-E – How satisfied are you with the value for money for your [SERVICE]?
Base: All respondents with each service (725 TV in a bundle, 996 TV standalone, 1338 fixed broadband in bundle, 714 fixed broadband standalone, 74 mobile in bundle, 2256 mobile standalone, 1295 fixed line in bundle, 1214 fixed line standalone) . *Caution: Low base. Significance testing shows any difference between those with a service in a bundle and those with a standalone service.
Source: Ofcom research, fieldwork carried out by Saville Rossiter-Base in February to March 2010

Those with services in a bundle are more likely to be very satisfied with value for money than those with standalone services for each of the four services. The greatest difference in the proportion saying they are very satisfied with value for money is seen for mobile phone (62% vs. 45%), followed by fixed broadband (42% vs. 31%) and pay TV (41% vs. 31%), with a smaller, but still significant, difference for fixed line voice (44% vs. 38%).

Annex 1

Glossary

Term	Definition
Bundle	Same supplier used for two or more services and one bill received from the supplier or (if unsure about billing) confirmation that the consumer gets the services as a package rather than as separate services. The bundle may or may not be discounted
Double/ double play	Fixed broadband and fixed line voice from the same supplier
Triple/ triple play	Pay TV and fixed broadband and fixed line voice from the same supplier
Standalone	Different supplier used for the service or more than one bill received where the same supplier is used for two or more services or (if unsure of billing) confirmation that the consumer gets the service as a separate service rather than as part of a package
Switched	Switched to another supplier in the last year – whether whole package, individual services in the package, or standalone service
Considered (*Additional criteria applied to answer detailed questions on consideration)	Considered switching to another supplier in the last year but not switched (*and (at least) looked into the process needed to change supplier (if not contacted current supplier about cancelling/ other suppliers about using) and not actively looking for another provider at the moment or actively looking but do not expect to switch in the next 3 months)
Inactive	Not switched supplier in the last year and not considered switching at all
NoT (Notification of Transfer)	“I contacted my new supplier to start the switch. My new supplier then arranged the switch for me.”
MAC/ PAC (Migration/ Portability Authorisation Code)	“I needed to get a code from my old supplier to start the switch. I got the code and contacted my new supplier to give it to them. My new supplier then arranged the switch for me.”
C&R (Cease and Re-provide)	“I had to arrange when the old service stopped and the new service started. I contacted my old supplier to tell them I wanted to cancel. I contacted my new supplier to tell them I wanted to start using their service.”