



Provision of quality of service information

Research Document

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Section 1

Executive Summary

Introduction

Qualitative research conducted amongst consumers and SMEs confirmed that several factors combine to determine overall perceptions of a provider in the communications services sectors, a number of which fall under the high level category of “Quality of Service”.

When asked to define what constitutes “Quality of Service” in the communications services sector, both consumers and SMEs raised several aspects of the service they receive from their telecoms providers. These fall into two high level categories: technical service (i.e. the performance of the service networks themselves) and customer service (including technical support, loyalty rewards and/or deals and product / package).

Further quantitative research conducted amongst consumers showed that it is actually the technical service that tends to be the more important aspect of “Quality of Service”. However consumers nonetheless display some interest in using information that covers aspects of customer service as well as network performance issues.

The detailed findings with regard to levels of interest for information on the constituent elements of “Quality of Service” are provided on a sector by sector basis in this Executive Summary.

Fixed Line Summary

When shown a list of all the possible elements of “Quality of Service” in this sector, two thirds of fixed line decision-makers (66%) were able to identify at least one of these factors as being important when choosing a fixed line supplier.

Of all the factors tested, line reliability and call quality were the most important aspects when choosing a supplier in this sector – both relating to the network performance dimension of “Quality of Service”. The third most important factor was speed of repairing faults, a customer service dimension. When it comes to the information that consumers most want to compare suppliers on, the ‘time taken to resolve faults’ was more likely to be used than the ‘number of faults per thousand customers’.

The other two types of “Quality of Service” information that consumers said they would be most likely to use to compare providers on were ‘whether you have to pay for technical help/support’ and ‘average time taken in minutes to speak to someone when you call’.

At a total level, the stated intention to use quality of service information to compare suppliers ranges from 43% to 61% depending on the information being offered. However, this falls to between 16% and 28% based on a more conservative measurement that takes into account the fact that consumers do not always follow through on their intentions. The calculation, which is a market research industry standard, assumes that 70% of those saying “very likely to use” and 20% of those saying they would be “fairly likely to use” would go on to do so.

It is also important to take into account the fact that some consumers are not actively participating in this sector currently. Based on the more realistic scenario, likelihood to use information among the participation segments:

- Rises to between 18% and 34% among Switchers (those who have switched supplier or negotiated with their current supplier in the past, as well as those who are actively looking to switch to a new supplier)
- Rises to between 24% and 35% among Considerers (those who are open to the idea of a new supplier but have not yet switched or negotiated or starting looking around)
- Falls to between 13% and 24% among Non-switchers (those who have not switched in the past and are not interested in a new supplier)

Around a third said they would make a considerable or reasonable effort to find information on network performance (38%) or customer service (35%) and usage estimates assume that the data is easily accessible and in a format that is user friendly and easy to interpret.

Most were seeking a balance of subjective information (from a reliable customer satisfaction survey) and objective information (in the form of factually based data on complaints resolved).

In the fixed line sector, consumers were almost as likely to make an effort to find information on customer service as they were to find information on network performance.

Mobile Phone Summary

When shown a list of all the possible elements of “Quality of Service” in this sector, two thirds of mobile decision-makers (66%) were able to identify at least one of these factors as being important when choosing a mobile supplier.

Of all the factors tested, network coverage was the most important by some margin, particularly among those with 3G mobiles. Despite this, when it comes to the information that consumers most want to compare suppliers on, the ‘time taken to resolve faults’ was more likely to be used than the ‘number of faults per thousand customers’. This implies that when network performance information is presented in this way (as a statistic per thousand customers) may not be particularly helpful in the decision-making process.

The other two types of “Quality of Service” information that consumers said they would be most likely to use to compare providers on were ‘whether you have to pay for technical help/support’ and ‘average time taken in minutes to speak to someone when you call’.

At a total level, the stated intention to use quality of service information to compare suppliers ranges from 27% to 67% depending on the information being offered. However, this falls to between 10% and 32% based on the more conservative measurement described above.

It is also important to take into account the fact that some consumers are not actively participating in this sector currently. Based on the more realistic scenario, likelihood to use information among the participation segments:

- Rises to between 18% and 29% among Switchers
- Rises to between 20% and 36% among Considerers
- Falls to between 14% and 26% among Non-switchers

Around a third said they would make a considerable or reasonable effort to find information on network performance (41%) or customer service (36%) and usage estimates assume that the data is easily accessible and in a format that is user friendly and easy to interpret.

Most were seeking a balance of subjective information (from a reliable customer satisfaction survey) and objective information (in the form of factually based data on complaints resolved).

In the mobile phone sector, consumers were more likely to make an effort to find information on “Quality of Service” information related to network performance than customer service.

Broadband Internet Summary

When shown a list of all the possible elements of “Quality of Service” in this sector, almost four fifths of broadband decision-makers (79%) were able to identify at least one of these factors as being important when choosing a broadband supplier. This indicates the highest importance of quality of service across all four communications sectors.

Of all the factors tested, connection speed was the most important aspect by some margin, followed by connection reliability and consistent speed – all aspects relating to the network performance dimension of “Quality of Service”. Speed was also the type of information that consumers were most likely to want to compare providers on. However, as regards reliability of connection, the comparative information that consumers were most likely to use in this regard was again ‘time taken to resolve faults’ as opposed to the ‘number of faults per thousand customers’. This implies that when network performance information is presented in this way (as a statistic per thousand customers) it may not be particularly helpful in the decision-making process. It is possible that an expression of connection reliability that is easier to understand might be more likely to be used.

The other two types of “Quality of Service” information that consumers said they would be most likely to use to compare providers on were ‘whether you have to pay for technical help/support’ and ‘average time taken in minutes to speak to someone when you call’.

At a total level, the stated intention to use quality of service information to compare suppliers ranges from 51% to 75% depending on the information being offered. However, this falls to between 18% and 35% based on the more conservative measurement.

It is also important to take into account the fact that some consumers are not actively participating in this sector currently. Based on the more realistic scenario, likelihood to use information among the participation segments is not as differentiated as seen in other communications services sectors (in other words, likely usage of information is more consistent across all consumer segments):

- Between 20% and 37% among Switchers
- Between 24% and 38% among Considerers
- Between 18% and 30% among Non-switchers

More consumers in this sector said they would make a considerable or reasonable effort to find information on network performance (55%) or customer service (48%) although usage estimates nonetheless assume that the data is easily accessible and in a format that is user friendly and easy to interpret.

Most were seeking a balance of subjective information (from a reliable customer satisfaction survey) and objective information (in the form of factually based data on complaints resolved).

In the broadband sector, consumers were more likely to make an effort to find information on “Quality of Service”, with a slightly greater willingness to invest time looking for network performance information than customer service.

Pay TV Summary

When shown a list of all the possible elements of “Quality of Service” in this sector, three quarters of Pay TV decision-makers (75%) were able to identify at least one of these factors as being important when choosing a Pay TV supplier.

Of all the factors tested, after choice of channels, picture/signal quality was the most important by a considerable margin. Despite this, the aspect of network performance information that consumers were most likely to want to compare providers on was again ‘time taken to resolve faults’ as opposed to the ‘number of faults per thousand customers’. (Consumers were not directly asked about likely uptake of comparative information on channel choice or picture quality in this survey). This again implies that when network performance information is presented in this way (as a statistic per thousand customers) it may not be particularly helpful in the decision-making process. It is possible that an expression of picture/signal quality that is easier to understand might be more likely to be used.

The other two types of “Quality of Service” information that consumers said they would be most likely to use to compare providers on were ‘whether you have to pay for technical help/support’ and ‘average time taken in minutes to speak to someone when you call’.

At a total level, the stated intention to use comparable quality of service information ranges from 49% to 66% depending on the information being offered. However, this falls to between 17% and 32% based on the more conservative measurement.

It is also important to take into account the fact that some consumers are not actively participating in this sector currently. Based on the more realistic scenario, likelihood to use information among the participation segments is not as differentiated as seen in other communications services sectors (in other words, likely usage of information is more consistent across all consumer segments):

- Rises to between 22% and 36% among Switchers
- Rises to between 19% and 37% among Considerers
- Falls to between 18% and 30% among Non-switchers

Around a third said they would make a considerable or reasonable effort to find information on network performance (46%) or customer service (36%) and uptake estimates assume that the data is easily accessible and in a format that is user friendly and easy to interpret.

As with the other sectors, measures of customer satisfaction ranked higher (in terms of propensity to use this data) than operational data measures, however most consumers could see the benefit in having both sources of information.

Section 2

Objectives and methodology

2.1 Introduction

Service in the communications sector is a fairly wide ranging concept, including product reliability issues, ease of getting hold of providers, ownership of the issue, manner of the response, speed of dealing with complaints and the degree of follow-up.

Given the increasing commoditisation of areas of the communications sector (particularly with regard to broadband and fixed line services) service is one of the key areas where products and services can differentiate, and yet is not always considered by consumers until things go wrong and/or they have had poor experiences in the past. The invisible then becomes visible and the value of 'service' rises to the fore, becoming an important driver of behaviour.

In addition, as the sector develops and with new communications services such as Pay TV and bundling becoming increasingly important in the sector, consumer expectations of the quality of the service they receive from providers are changing.

Research conducted by Ofcom in this area shows that quality of service is the second most important driver of consumer switching after price. Ofcom therefore believes that quality of service information is potentially valuable to consumers when making decisions about their communications service. The need for further research has subsequently arisen in order to establish the type of quality of service information that consumers both want and would use, to help them make decisions when choosing products/services.

2.2 Objectives

The main objective of this study was to inform Ofcom's thinking in relation to the provision of quality of service information to consumers in each of the communications sectors (fixed line phone, mobile phone, broadband internet and Pay TV).

More specifically, the research was intended to fulfil the following detailed objectives:

- ▶ To understand the type of quality of service information consumers would like and/or would use when making supplier comparisons and choices in the four communication sectors, both individually and as bundled packages.
- ▶ To measure the level of demand for additional quality of service information in each sector.
- ▶ To identify most effective methods/outlets for any additional information.
- ▶ Although the main focus of this research was residential consumers, there was also a requirement to understand whether the needs of small to medium size businesses (up to 250 employees) were similar or different in this regard.

2.3 Methodology

A two stage programme of market research was designed to fulfil these objectives:

Preliminary Qualitative Stage

The main objectives of the qualitative research were to:

- ▶ Understand how consumers and SMEs define “Quality of Service” in each sector.
- ▶ Explore the potential value to these audiences in having information on Quality of Service in each sector.
- ▶ Identify the types of information that would have most value in each sector.
- ▶ Identify the most effective formats and channels for communicating any additional information.

In order to deliver the above objectives the following approach was adopted.

1) 12 mini focus groups with consumers

(each with up to 6 respondents attending and lasting 1.5 hours).

The following sample framework was developed with a view to ensuring a broad spread of interviews across the key consumer profile variables that will be used for analysis purposes, namely: age, social grade, lifestyle and region.

Group	Lifestage	SEG	Location	Urban/Rural classification
1	Pre-Family (20-35yrs)	A/B/C1	England (London)	Urban (bundled)
2	Family (30-45yrs)	C2/D/E	England (London)	Urban (bundled)
3	Pre-Family	A/B/C1	England (Birmingham)	Sub-urban (non-bundled)
4	Post Family (50+ yrs)	C2/D/E	England (Birmingham)	Sub-urban (non-bundled)
5	Post-Family	A/B/C1	England (York)	Rural (mix)
6	Family	C2/D/E	England (York)	Rural (bundled)
7	Family	A/B/C1	Scotland (Glasgow)	Urban (mix)
8	Pre-Family	C2/D/E	Scotland (Glasgow)	Urban (mix)
9	Family	A/B/C1	Wales	Rural (non-bundled)
10	Post-Family	C2/D/E	Wales	Rural (non-bundled)
11	Post-Family	A/B/C1	Northern Ireland	Urban (mix)
12	Pre-Family	C2/D/E	Northern Ireland	Urban (bundled)

In addition, the groups were recruited to the following criteria:

Responsibility for decision-making:

- ▶ All respondents had to be the sole or joint household decision maker in terms of choosing and managing technology suppliers (telephone, internet and mobile).

Technology usage:

- ▶ All respondents had to have at least one of the four technologies being assessed: fixed line phone, mobile phone, Pay TV (i.e. Sky or Virgin Media), broadband internet.
- ▶ In each group, a minimum of 3 respondents had to have broadband and a minimum of 2 respondents to have Pay TV.
- ▶ Across all groups, a minimum of 6 respondents were mobile phone only (i.e. did not have a fixed line).
- ▶ Across the groups, we achieved a mixture of those on bundled packages (containing at least two of the four technologies) and non-bundled packages. Groups 1 and 6 were recruited to be exclusively bundled, all others fell out naturally.

Gender:

- ▶ Mix of men and women in each group

Attitude:

- ▶ In addition, anyone saying service was unimportant, or who was indifferent to the service they received, were excluded from the groups on the basis that they would be unlikely to make constructive participants in the discussion.
- ▶ All respondents also had to agree to one of the following statements:

IN PAST 4 YEARS

Switched/considered switching/changed tariff/asked supplier to match a deal

CURRENTLY

Make an effort to keep up-to-date with the sector / always on the look out for deals

IN FUTURE

Certain/very likely to look at an alternative provider/deals/switch/re-negotiate existing package/change existing package or take up a new service altogether

2) 12 Telephone depth interviews with SMEs

(each lasting up to 30 minutes)

The following sample framework was developed with a view to ensuring a broad spread of interviews across the key business profile variables that will be used for analysis purposes, namely: company size, industry sector and region.

Group	Size	Sector	Location
1	Large (100-250)	White collar	England
2	Large	Blue collar	England
3	Medium(25-50)	White collar	England
4	Medium	Blue collar	England
5	Small (1-10)	White collar	England
6	Small	Blue collar	England
7	Large	White collar	Scotland
8	Medium	Blue collar	Scotland
9	Medium	White collar	Wales
10	Small	Blue collar	Wales
11	Small	White collar	Northern Ireland
12	Large	Blue collar	Northern Ireland

In addition, all depths were recruited to the following criteria:

Responsibility for decision-making:

- ▶ Within each SME we interviewed the main person responsible for choosing and managing technology suppliers (telephone, internet and mobile) on behalf of the business.

Technology usage:

- ▶ All respondents had to have at least one of the following: fixed line phone, mobile phone, broadband internet. A mix of different technology combinations were included in the research.

Nature of growth:

- ▶▶ A minimum of 2 start-ups (set up in business within the last 24 months)
- ▶▶ A minimum of 2 high growth companies (indicate growth in the past two years as well as aspirations for significant growth of at least 10% in next two years)
- ▶▶ A minimum of 2 respondents who are early adopters/risk takers, and 2 who are more cautious with regard to new technology/risk averse

Attitude:

- ▶▶ In addition, anyone saying service was unimportant, or who was indifferent to the service they received, was excluded on the basis that they would be unlikely to make constructive participants in the discussion.
- ▶▶ All respondents also had to agree to one of the following statements:

IN PAST 4 YEARS

Switched/considered switching/changed tariff/asked supplier to match a deal

CURRENTLY

Make an effort to keep up-to-date with the sector / always on the look out for deals

IN FUTURE

Certain/very likely to look at an alternative provider/deals/switch/re-negotiate existing package/change existing package or take up a new service altogether

Main Quantitative Stage

The main objectives of the quantitative research were to:

- ▶▶ Measure the overall importance of Quality of Service as a driver of decision-making in each sector.
- ▶▶ Measure the overall level of demand for additional Quality of Service information in each sector.
- ▶▶ Establish what types of information on Quality of Service consumers and SMEs would be most likely to want/use to facilitate decision-making in each sector.

In order to deliver the above objectives the following approach was adopted:

- ▶▶ 2,186 face-to-face interviews via consumer omnibus (including a boost of 55 interviews in Northern Ireland).
- ▶▶ Fieldwork conducted in September 2008.

A UK representative consumer sample was achieved on this basis.

Technology	Have for personal use at home:	Main decision-maker for:
Landline	84%	65%
Mobile phone	84%	72%
Broadband internet	61%	43%
Pay TV	34%	25%
None	2%	11%

Section 3

Main Findings

3.1 Introduction

The qualitative research conducted amongst consumers and SMEs confirmed that several factors combine to determine overall brand perceptions, a number of which fall under the high level category of “Quality of Service”.

When asked to define what constitutes “Quality of Service” in the communications services sector, both consumers and SMEs raised several aspects of the service they receive from their telecoms providers. These fall into two high level categories: technical service (i.e. the performance of the service networks themselves) and customer service (including technical support, loyalty rewards and/or deals and product / package).

There are subtle differences in the elements comprising service quality across the four technologies being assessed (fixed line phone, mobile phone, broadband internet and Pay TV). These are outlined below:

Fixed Line Phone

In this sector network performance was expected but various aspects of customer service were key elements in the ‘Quality of Service’ definition:

- ▶ Network Performance
 - Reliability of connection (the line being free of faults and high call quality i.e. no distortion on the line – i.e. not having to think about the product at all because it works)
- ▶ Service
 - Fault repair (if faults do occur, the speed and efficiency with which they are repaired and what is done to compensate)
 - Technical support (engineers turning up when they say they will and ensuring that the problem is genuinely fixed before they leave)
 - Set-up and installation (the speed with which a new connection can be installed, where relevant)
 - Customer service (ease of getting help, ability to have a meaningful dialogue with staff, keeping promises, free helpline/helpdesk, being proactive, quality of billing, accuracy of billing)
- ▶ Package/Deals
 - Deals (e.g. discounted calls to certain telephone numbers, inclusive calls, discounted international calls, free line rental etc.)
 - Not having to pay extra for non-direct debit payment methods

Mobile Phone

In this sector, while coverage and package deals dominated user understanding of 'Quality of Service', customer service did also form part of the definition:

- ▶▶ Network Performance
 - Coverage (network availability and signal strength – more of an issue in rural areas where living in poor reception areas, elsewhere tend to assume all networks now fairly similar)
- ▶▶ Service
 - Customer service (defined as in other technologies but a larger number of touchpoints than other technologies such as replacement handsets/upgrades)
 - Clear explanation of packages (transparency of extra costs/international charges a particular issue – also an issue on the borders of Northern Ireland and the Republic where roaming charges can apply)
 - Technical support (ease of reporting faults, ease of obtaining replacement handsets, speed of resolving issues)
- ▶▶ Package/Deals
 - Loyalty deals (cash-back, loyalty bonuses, proactively offering upgrades, being prepared to negotiate on the package)

Broadband Internet

In this sector 'Quality of Service' was defined primarily as a combination of network performance and technical support, although it was also seen to include certain aspects of customer service:

- ▶▶ Network Performance
 - Speed of connection (more sophisticated users place a particular emphasis on contention ratios although the discrepancy between claimed and actual speeds is now a familiar issue)
 - Reliability of connection (the number of problems experienced and the length of time taken to fix them)
- ▶▶ Service
 - Technical support (access to support staff that know what questions to ask in order to identify the problem and can provide advice in laymans' terms)
 - Set-up and installation (the speed with which a new connection can be installed, where relevant, also the simplicity of installing the broadband service itself is a key element of service to all users)
 - Customer service (is described in the same way across all technologies)

▶▶ Package/Deals

- Added extras such as wireless routers
- Deals (free upgrades to higher speeds, discounts, ensuring customers are on the best package)

Pay TV

In this sector, users tended to define 'Quality of Service' in terms of package and deals but network performance and customer service also played a role:

▶▶ Network Performance

- Reliability of connection (picture quality, signal strength – even more of an issue in coastal areas where service can be disrupted by bad weather)

▶▶ Service

- Customer service (defined as for other technologies)
- Technical support (ease of reporting problems, speed of fault repair, speed and ease of obtaining replacement boxes, ability to resolve problems)

▶▶ Package/Deals

- Content (channel choice – even more of an issue in non-cable areas where supply is restricted to Sky)
- Deals (additional services offered – e.g. Sky/V Plus, Catch up TV)
- Loyalty deals (willingness to negotiate or provide loyalty deals – e.g. offering similar deals to existing customers as well as new)
- Ability to flex packages up and down to suit needs

Bundled Packages

The constituent elements of Quality of Service did not fundamentally change for those on a bundled package, nor did the priority placed on Quality of Service as a key decision-making factor. While those who were not currently on a bundle tended to anticipate that customer service would be more of an imperative, this was not borne out by experience. Choice of provider among those on bundled packages was driven primarily by cost – even to the extent of being willing to trade off customer service to acquire lower prices. This may be explained by the fact that those on bundles were typically driven by one core technology, with the remaining technologies in the bundle being less critical.

The qualitative research showed that in assessing Quality of Service, two core dimensions of service need to be considered: 'network performance' as well as more traditional measures of 'customer service'. The definition of Quality of Service can also be stretched to include the package or deals offered to customers.

3.2 Fixed line

Of the sample of consumers whose opinions were canvassed in the omnibus research, the vast majority (84%) had a landline connection for personal use at home and two in three (65%) claimed to be the decision-maker for this technology.

Overall satisfaction amongst these decision-makers was high: 89% were satisfied overall, 44% being “very” satisfied.

Furthermore, participation in the sector was relatively low: most (71%) had not switched or negotiated their fixed line contract within the last four years and even higher proportions (83%) said they were not interested in switching to a new supplier in future. It follows that as many as one in five (19%) were not interested in comparing providers in this sector.

This is important contextual data as the likelihood of consumers to re-enter this sector will define the potential demand for “Quality of Service” information on fixed line providers.

Aspects important to fixed line consumers

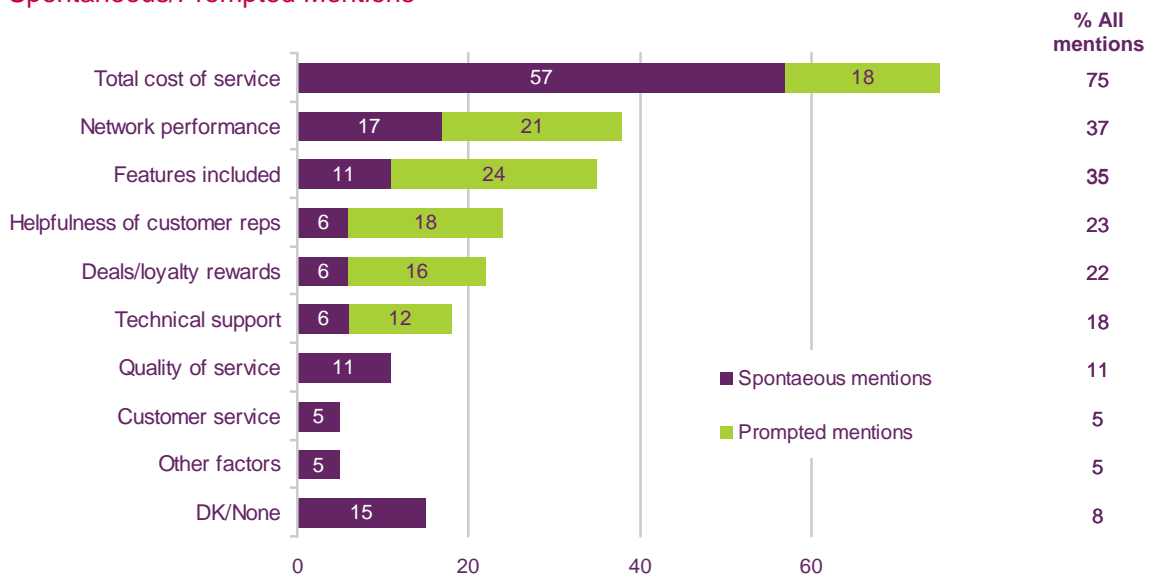
Respondents were first asked to identify what factors were important to them when thinking about their fixed line provider. This question was intended to establish the key decision-making criteria for the fixed line sector in order that we could identify the relative importance of Quality of Service in the mix.

Figure 1 shows that the total cost of the service was the most important factor by some margin, even after prompting: a total of 75% of decision makers identified cost as a key factor to them in relation to their fixed line provider, representing 38 percentage points more mentions than any other factor. This reflects indications in the qualitative research that this technology is (and has been for some time) regarded as a commodity product, commanding low levels of emotional connection from users simply because things rarely go wrong. Respondents in the qualitative research were typically only switching to gain cost savings.

“Quality of Service” as a generic category was mentioned by 11% of fixed line decision-makers. However the high level elements of Quality of Service were more likely to be identified: network performance was mentioned by around one in three (37%), customer service/helpfulness of customer representatives by almost one in four (23%), loyalty rewards by a similar proportion (22%) and technical support by almost one in five (18%).

Figure 1: Factors important when thinking about fixed line provider – all mentions

Spontaneous/Prompted Mentions

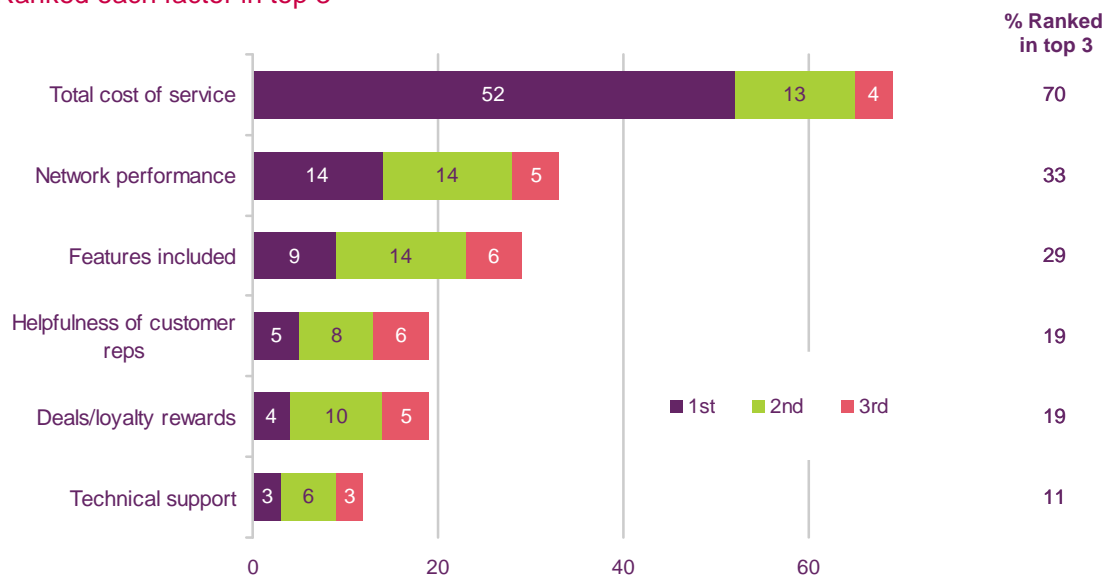


Source: Quality of Service Research – Q3a/b
 Base: All joint/sole decision makers for Landline Phones (n=1435)

Figure 2 shows that the ranked order of these factors mirrors the number of mentions shown above, confirming that cost was by far the greatest priority to consumers, followed by network performance and features.

Figure 2: Factors important when thinking about fixed line provider – ranked order

% Ranked each factor in top 3



Source: Quality of Service Research – Q3c
 Base: All joint/sole decision makers for Landline Phones (n=1435)

N.B. Excluded those who did not identify any issues as important

Aspects consumers want to compare fixed line providers on

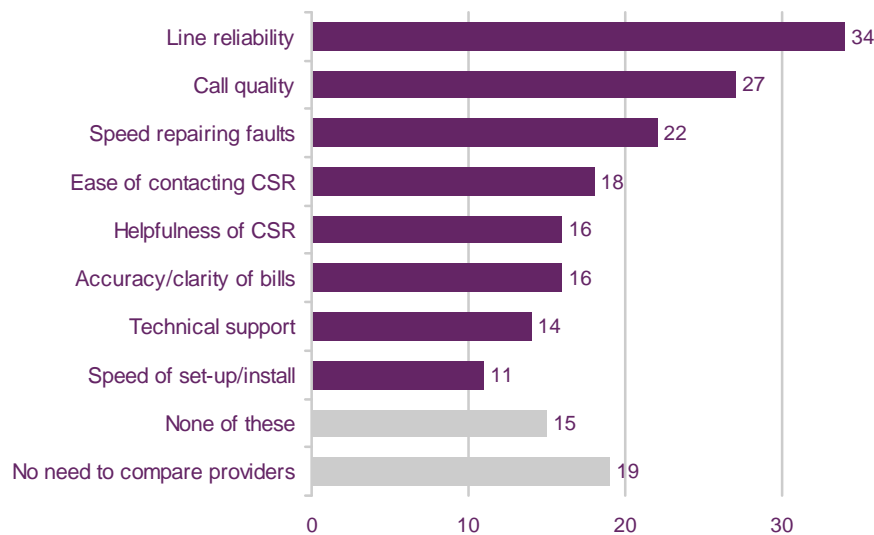
Respondents were then asked to consider the full range of different Quality of Service elements that were identified in the qualitative research and identify which, if any, they felt were important when choosing a supplier in this sector.

Figure 3 shows that the Quality of Service aspects related to network performance (namely line reliability and call quality) were important to a far greater proportion of fixed line decision-makers than those related to customer service (essentially all the other factors listed), which were mentioned by far fewer respondents.

It is noteworthy that around a third (34%) did not engage with any of these Quality of Service factors, either because they didn't regard any of them as important, or because they had no need to compare providers in this sector.

Figure 3: QoS factors important when comparing / choosing fixed line providers – all mentions

% Mentioning as important

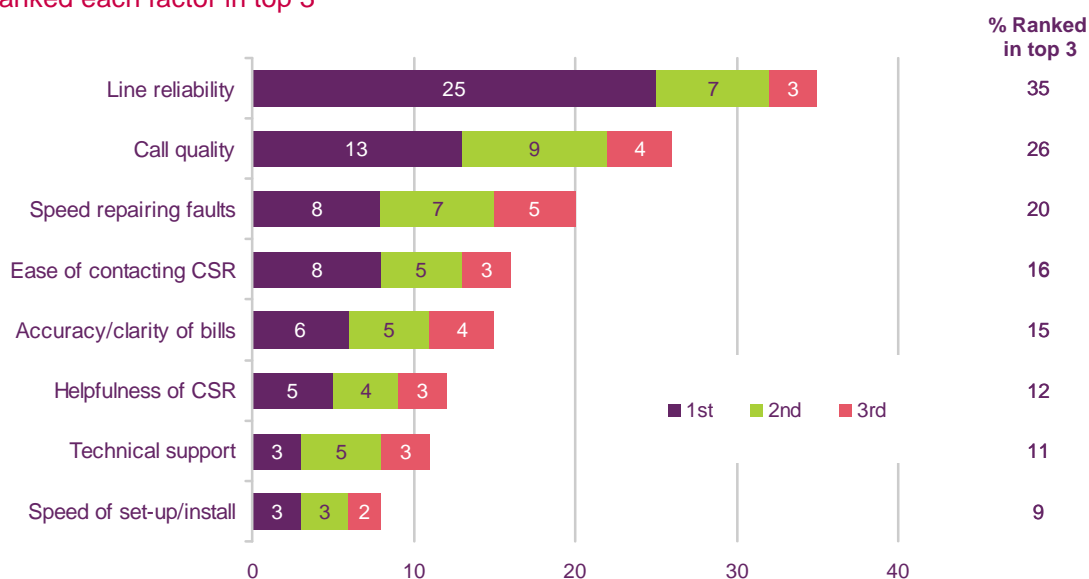


Source: Quality of Service Research – Q4a
 Base: All joint/sole decision makers for Landline Phones (n=1435)

The ranked order of factors shown in Figure 4 clearly identifies line reliability as the most important comparison point (for around a third of decision-makers – 35%), followed by call quality (important to a quarter of decision-makers – 26%). These priorities suggest that if Quality of Service information is defined purely in terms of customer service, it could have a more limited impact on decision-making.

Figure 4: QoS factors important when comparing / choosing fixed line providers – ranked order

% Ranked each factor in top 3



Source: Quality of Service Research – Q4b
 Base: All joint/sole decision makers for Landline Phones (n=1435)

N.B. Excluded those who did not identify any issues as important

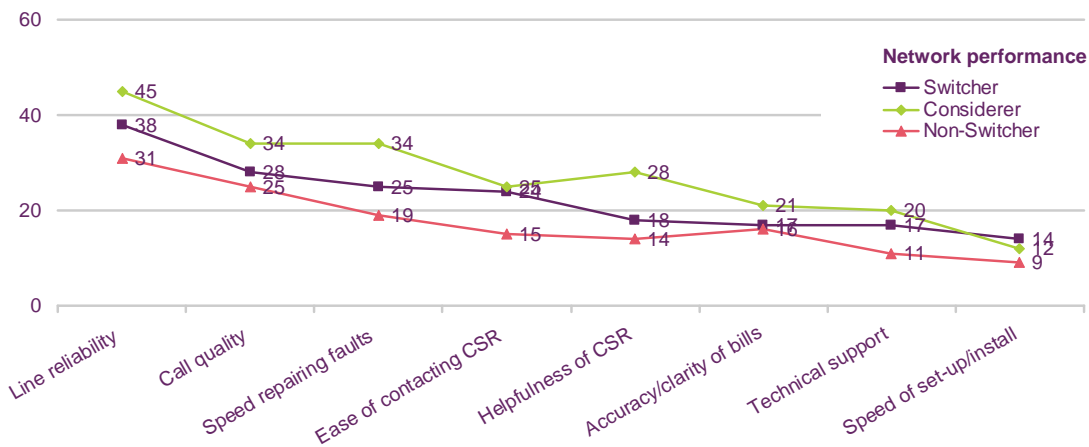
The research shows that the priority placed on Quality of Service factors also differed significantly based on levels of participation in the fixed line phone sector. Three participation segments were identified for analysis purposes:

- ▶ Switchers (those who have switched supplier or asked their current supplier to match a better tariff or package deal in the last four years – as well as those who are actively looking for a new supplier at the moment) – (30%)
- ▶ Considerers (those who are open to the idea of a new supplier but have not yet switched or negotiated) - (8%)
- ▶ Non-switchers (those who have not switched or negotiated their contract in the past four years and who are not interested in a new supplier) – (62%)

Non-switchers gave lower importance ratings to all the Quality of Service factors tested, while Considerers tended to give the highest ratings, as indicated in Figure 5.

Figure 5: QoS factors important when comparing / choosing fixed line provider – by participation

% Mentioning QoS factor as important



Source: Quality of Service Research – Q4a analysed by Q8/9 segments
 Base: Joint/sole decision makers for Landline Phones in each segment

A few significant differences were also evident on socio-demographic variables:

- Line reliability, call quality and ease of contacting customer services tended to be equally important across all consumer groups.
- Speed of repairing faults and speed of set-up and installation were more important to men than women. The former increases in importance with age, the latter decreases in importance with age.
- Helpfulness of the customer service representative was more important to women than men. It was also more important to the under 35s and was inversely correlated to social grade, possibly indicating that younger and/or less well educated consumers require more help.
- Conversely, technical support was more important to men than women.

Likelihood to use information

Respondents were asked to think about a scenario where they were switching or wanted to assess whether there were other providers that would be more suitable than their current provider. Figure 6 shows how likely decision-makers felt they would be to use information on these Quality of Service aspects to compare the performance of different providers in this situation. (N.B. Respondents were asked to assume that the information would be available on all providers from a reliable source.)

This data indicates that the *stated intention* to use information was between 43%-61% across the aspects of Quality of Service tested. In fact more than half of all decision-makers in the fixed line sector claimed that they would be very or fairly likely to use six different types of information.

Interestingly, while line reliability and call quality were the most important elements of Quality of Service, the information decision-makers most wanted to compare providers on was not the number of faults occurring but the average time taken to resolve them (59% said they would be very or fairly likely to use the latter compared to 43% who would use the former).

The main element of customer service that decision-makers were most interested in was the average time they would spend on hold when trying to get through to a customer service representative.

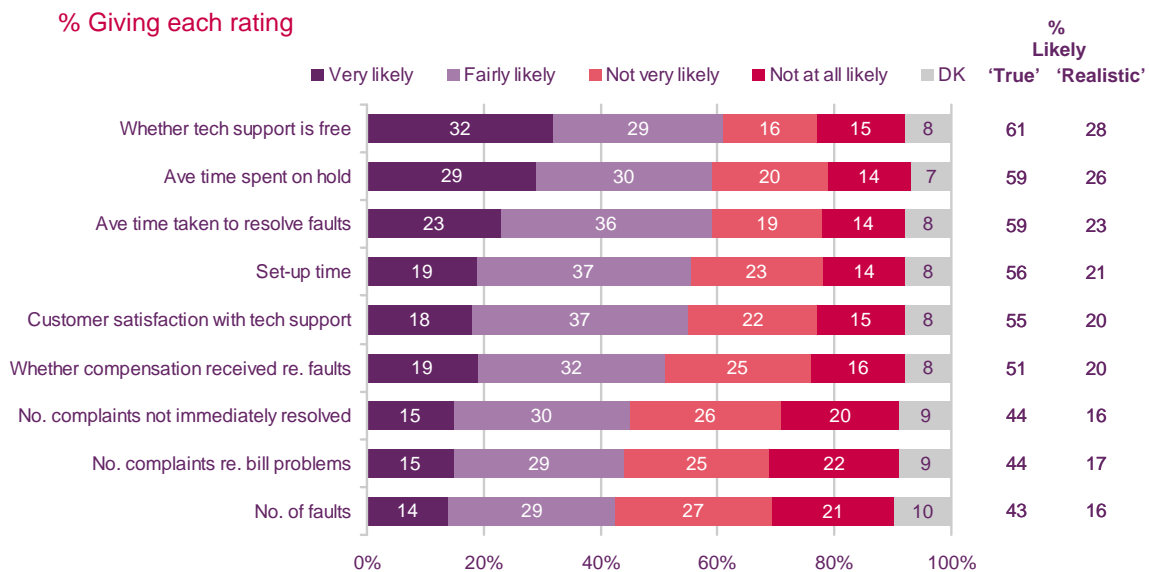
When considering uptake of any product or service it is typical to look at best- and worst-case scenarios. The best-case scenario could reasonably be assumed to be the sector's *stated intention to use*. However, given that people often do not follow through on their intended behaviour, these data can be down-weighted to give a more conservative estimate of uptake. In this case the ingoing assumption is that 70% of those saying they would be very likely to use the information would actually do so, while 20% of those saying they were fairly likely to use the information would actually do so. (N.B. These weighting factors are subjective but they are also based on fairly conservative research industry norms).

Figure 6 also shows the likely uptake of information on this basis, from which it is possible to see that overall likelihood to use Quality of Service information falls by around a third, to between 16% and 28% depending on the type of information tested.

On the basis of these 'down-weighted' data, at least one in four decision-makers would compare fixed line providers on the following factors:

- ▶▶ whether technical support is free (28%)
- ▶▶ average time spent on hold (26%)
- ▶▶ average time taken to resolve faults (23%)

Figure 6: Likelihood to use information to compare fixed line provider performance



Source: Quality of Service Research – Q5
 Base: All joint/sole decision makers for Landline Phones (n=1435)

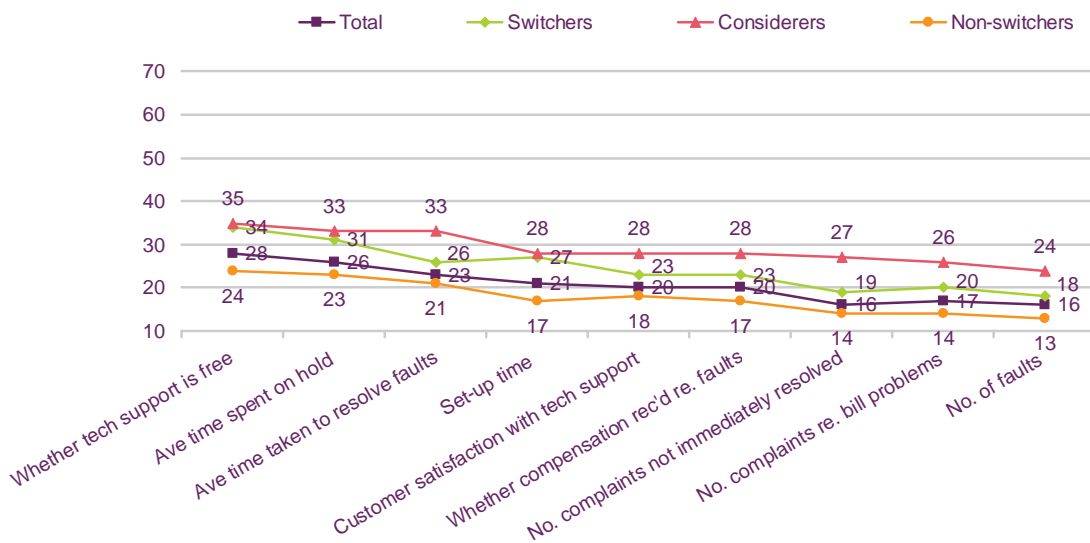
The research shows that likely uptake varies depending on how engaged consumers are in the sector. Looking at overall likelihood to use Quality of Service information on the basis of stated intention, Considerers demonstrate significantly higher levels of interest in Quality of Service information across all the areas on which that information might be available, with likelihood to use ranging from 61% to 73%.

Figure 7 looks at likelihood to use different types of Quality of Service information across the three key participation segments in a worst-case scenario. Again, Considerers

demonstrated the highest levels of interest in Quality of Service information across all the areas on which that information might be available, with likelihood to use ranging from 24% to 35%. Likelihood to use this type of information was most notably higher than either Switchers or Non-Switchers with regard to ‘average time taken to resolve faults’ and ‘number of complaints not immediately resolved’. This might infer that Considerers have a higher propensity to re-enter the sector as a result of problems with their current service provider, encouraging them to make more informed decisions on this basis in their next contract.

Figure 7: Likelihood to use information to compare fixed line provider performance – by participation

DOWNWEIGHTED % Very /Fairly Likely to use each source



Source: Quality of Service Research – Q5
 Base: All joint/sole decision makers for each technology (n=1435/412/109/891)

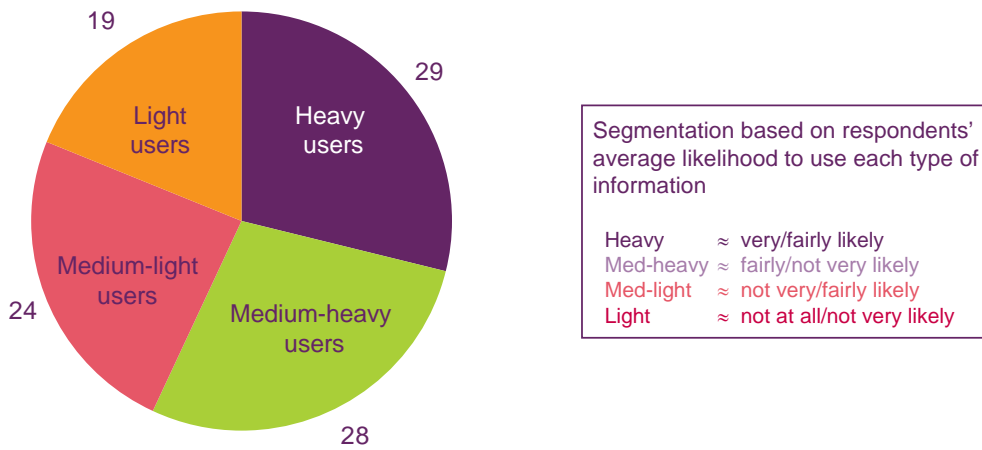
Another way to segment the sector is simply to consider overall propensity to use Quality of Service information by looking at respondents’ average scores across each type of Quality of Service information. This was assessed using a four-point scale, where one meant not at all likely and four meant very likely. On this basis the sector may be divided into four discrete segments:

- ▶▶ Heavy Users: average score between 3 and 4
 - Might be described as very/fairly likely to use any QoS information
- ▶▶ Medium to Heavy Users: average score between 2.5 and 3
 - Might be described as being fairly/not very likely to use any QoS information
- ▶▶ Medium to Light Users: average score between 2 and 2.5
 - Might be described as not very/fairly likely to use any QoS information
- ▶▶ Light Users: average score between 1 and 2
 - Might be described as not at all/not very likely to use any QoS information

Figure 8 shows the distribution of fixed line decision-makers on these segments.

Figure 8: Profile of fixed line sector by four usage segments

% in each segment

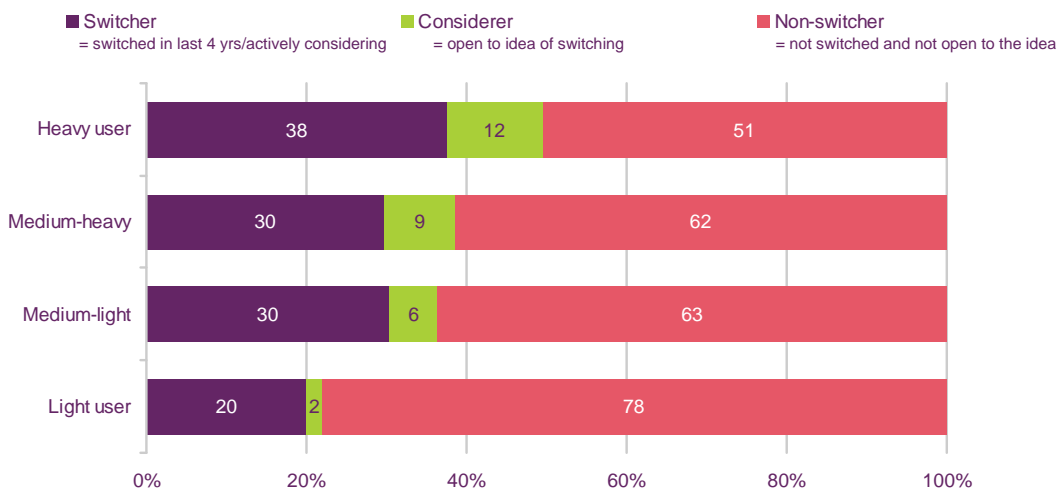


Source: Quality of Service Research – Q5
 Base: All joint/sole decision makers for Landline Phones (n=1435)

Heavy users might reasonably be described as a key target market given their higher propensity to use Quality of Service information. Their level of participation displayed by each of these segments is shown in Figure 9. The data shows that Heavy Users in the fixed line sector were significantly more likely to have already re-entered the sector or be open to doing so: 38% of Heavy Users were Switchers (experienced or actively looking) compared to 20% of Light Users – and 12% were Considerers compared to just 2% of Light Users. This is simply another way to establish that interest in Quality of Service information is highest amongst the more engaged segments of the sector.

Figure 9: Levels of participation among four usage segments

% of each segment who have switched or might switch in the future



Source: Quality of Service Research – Q8/9 analysed by Q5 segments
 Base: All joint/sole decision makers for Landline Phones in each segment (n=410/400/349/275)

The Heavy Users profile is relatively affluent, working families aged between 25 and 44 years as shown below. This data is based on respondents from all four sectors.

Figure 10: Socio-demographic profile of four usage segments

	Heavy users	Medium-heavy	Medium-light	Light users
Gender				
Male	52	51	48	47
Female	48	49	52	53
Age				
16-24	11	16	10	11
25-44	47	40	30	25
45-64	31	28	34	30
65+	11	15	25	34
Social Grade				
AB	27	23	17	16
C1C2	50	47	47	44
DE	24	30	36	41
Working status				
Working	61	57	48	43
Not working/studying	22	24	19	16
Retired	17	20	32	41
Children at home				
Yes	39	30	26	24

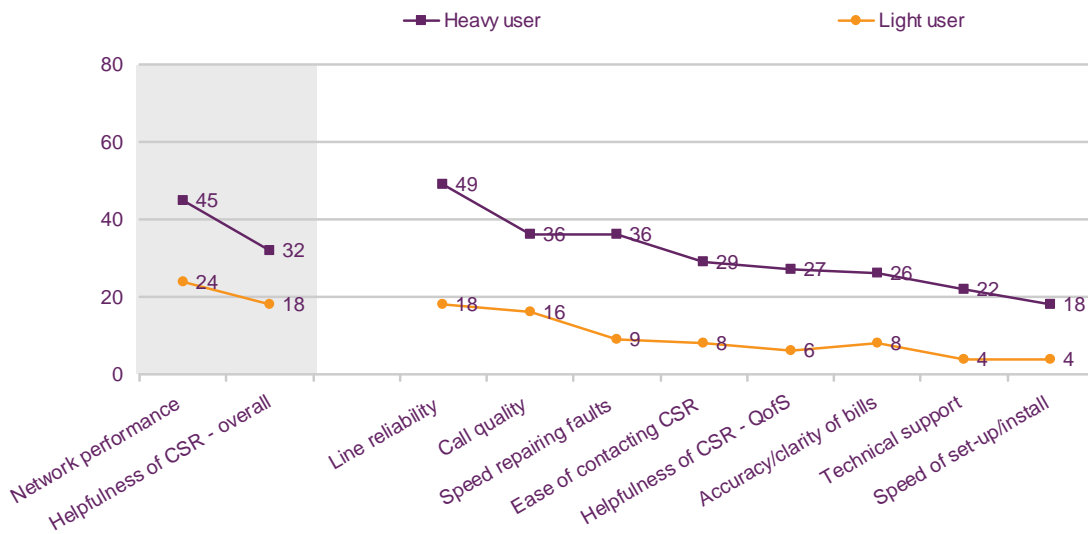
Source: Quality of Service Research – demographics analysed by Q5 segments
 Base: All joint/sole decision makers for all technologies in each segment (n=481/554/462/411)

The research data shows that Heavy Users placed a higher importance on Quality of Service information than any other segment. As shown in Figure 11, at an overall level, Heavy Users were almost twice as likely as Light Users to regard network performance as an important aspect of their fixed line provider (45% compared to 24% respectively). They were also more likely to regard customer service as a key driver (32% and 18% respectively) at an overall level. It follows that Heavy Users were more interested in comparing their fixed line providers on all the constituent elements of Quality of Service. The gap between Heavy and Light Users was most marked on line reliability and speed of repairing faults, as is consistent with the priority placed on network performance at an overall level.

Figure 11: All factors important when choosing / comparing fixed line providers – by usage segment

Provision of quality of service information

% of each segment mentioning factors as being important

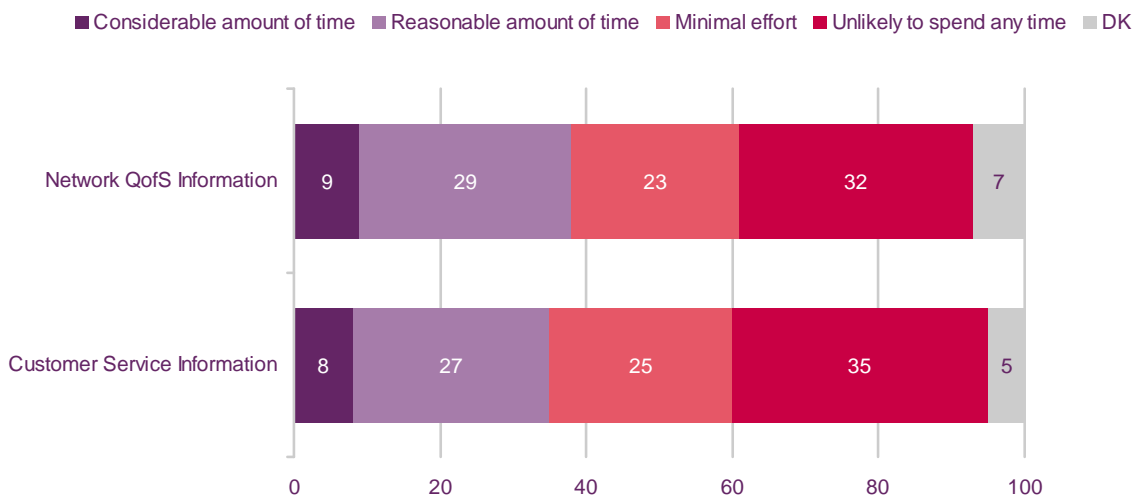


Source: Quality of Service Research – Q3a/b, Q4 analysed by Q5 segments
 Base: All joint/sole decision makers for Landline Phones in each segment (n=410/400/349/275)

Figure 12 shows that around two in five decision-makers in the fixed line sector (38%) would make at least a reasonable amount of effort to look for information on network quality of service. A similar proportion (35%) said they would make an effort to find information on customer service. However, consumers were polarised on this issue: almost as many said they were unlikely to spend any time looking for information on either of these two aspects of Quality of Service (32% and 35% respectively).

Figure 12: Length of time willing to spend searching for information on fixed line providers

% Stating each



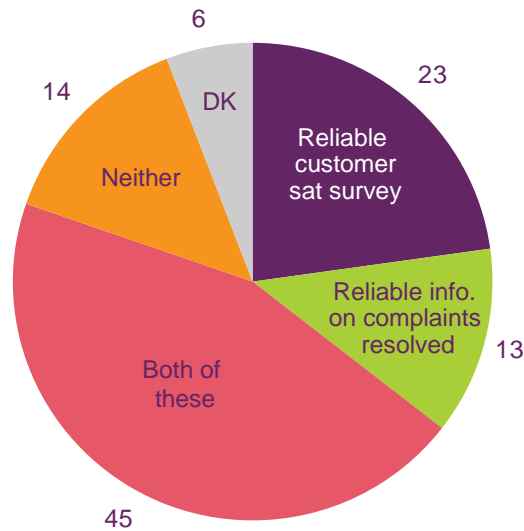
Source: Quality of Service Research – Q7
 Base: All joint/sole decision makers for Landline Phones: Sample 1 (n=697), Sample 2 (n=738)

Most consumers in this sector (45%) felt that the most valuable way to provide Quality of Service information was via a combination of subjective data (i.e. via a reliable customer satisfaction survey) as well as objective data (i.e. statistics based on actual service levels/performance), as Figure 13 shows.

This reinforces the qualitative research findings, which showed that there was a role for customer satisfaction data as long as it met certain criteria, namely that it was robust (i.e. a sample that was not overly self-selecting and large enough to be meaningful), from an independent source (i.e. not from the providers themselves) and supported with factual data, which was perceived as being less open to interpretation and/or manipulation.

Figure 13: Most valuable type of information on fixed line providers

% Stating each

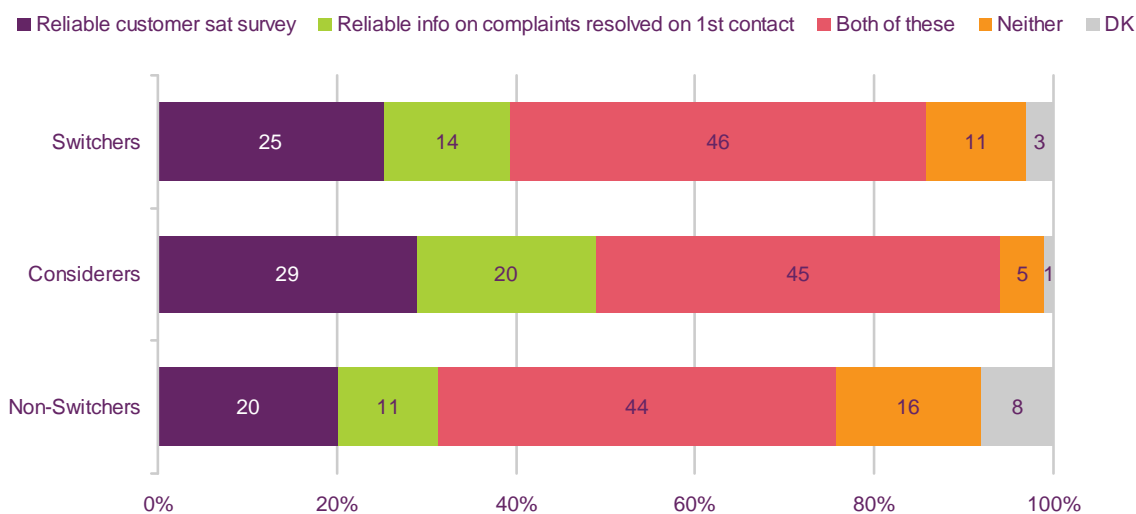


Source: Quality of Service Research – Q6
 Base: All joint/sole decision makers for Landline Phones (n=1435)

Figure 14 shows that this was consistent across the three key participation segments, although Considerers were marginally more interested in customer satisfaction surveys than the other two segments (29% compared to 25% among Switchers and 20% among Non-Switchers).

Figure 14: Most valuable type of information on fixed line providers – by participation

% Stating each



Source: Quality of Service Research – Q6
 Base: All joint/sole decision makers for Landline Phones in each segment

Summary of findings in the fixed line phone sector

When consumers were asked to think about what mattered to them in their fixed line provider, by far the most important factor identified was the total cost of the service.

At a high level, Quality of Service featured most strongly in terms of network performance, which is the second most important driver. Customer service was mentioned by fewer decision-makers in this sector and ranked lower in importance.

Drilling down into all the constituent elements of Quality of Service in the fixed line sector, it follows that line reliability and call quality were the most important factors when choosing a fixed line provider. However it is important to point out that one in three were not engaged with any aspects of Quality of Service, either having no need to compare providers in this sector or not regarding any of the factors as important in the selection process.

The stated intentions of fixed line decision-makers to use the different types of Quality of Service tested ranged from 43% to 61%. However this dropped to between 16% and 28% based on a more conservative estimate of how many consumers will do as they intend in reality. Likelihood to use all types of information was highest amongst those who have re-entered the sector (experienced switchers and those actively looking for a new supplier) and those who are open to the idea of a new supplier.

Although line reliability and call quality were the most important aspects of Quality of Service, consumers were more likely to want to compare providers on the time taken to resolve faults as opposed to the overall number of faults occurring.

The customer service aspects that consumers were most likely to want to compare providers on were whether technical support is free and how long the average person spends on hold waiting to speak to a customer service representative.

Most were seeking a balance of subjective information (from a reliable customer satisfaction survey) and objective information (in the form of factually based data on complaints resolved).

In the fixed line sector, consumers were almost as likely to make an effort to find Quality of Service information on customer service as they were for information on network performance.

3.3 Mobile

The incidence of mobile phones for personal use at home was on a par with incidence of fixed line phones: 84% used a mobile phone at home, just over half on a PAYG basis (58%) just under half on a contract basis (42%). Almost one in four (23%) claimed to have a mobile phone with 3G technology, although this research did not identify whether or not – or to what extent – this functionality was being used.

Almost all of these consumers (72%) claimed to be the decision-maker for this technology and were therefore eligible for interview.

Overall satisfaction amongst mobile phone decision-makers was high: 88% were satisfied overall, 42% being “very” satisfied. Those on a PAYG service were a little more likely to be very satisfied than those on a contract (44% vs. 40% respectively) although at an overall level satisfaction levels were the same regardless of payment method (87% vs. 89% respectively).

Participation in the mobile phone sector was also relatively low: most (69%) had not switched or negotiated their contract within the last four years and even higher proportions (80%) said they were not interested in switching to a new supplier in future. There are significant differences between PAYG and contract users in this regard, the latter displaying a higher propensity to re-enter the sector (23% of those on contracts stated that they were either actively looking for a new supplier or open to the idea of this, compared to just 15% of those with PAYG service). Those with 3G technology were even more likely to re-enter the sector (27%).

However, as with fixed line users, as many as one in five (18%) were not interested in comparing providers in this sector.

The proportion of consumers who were, or might in future be interested in, re-entering this sector will define the potential demand for “Quality of Service” information for mobile phone providers.

Aspects important to mobile consumers

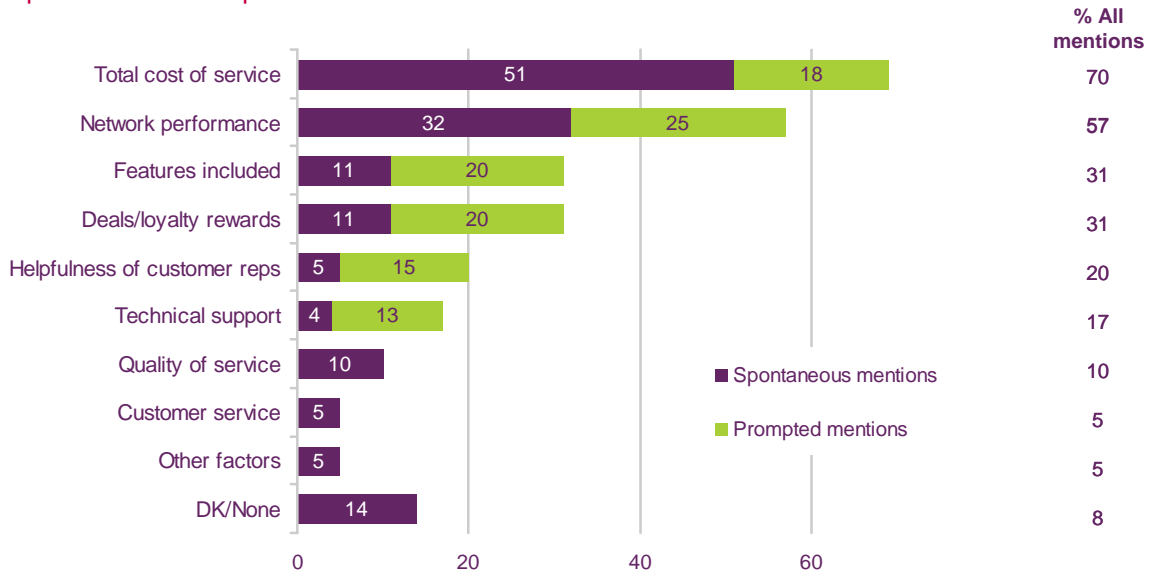
Figure 15 shows that when asked to identify what factors were important when thinking about their mobile phone provider, the total cost of the service was again the most frequently mentioned issue, both before (51%) and after (70%) prompting. However for this technology, network performance was a much closer second, with 57% mentioning this as a key driver of provider perceptions – a gap of 13%.

Features and loyalty deals were mentioned by almost one in three mobile phone decision-makers (31% for both aspects). However only a minority mentioned the other key dimensions of Quality of Service: customer service / technical support (20% and 17% respectively).

“Quality of Service” as a generic category was mentioned by few (10%) mobile phone decision-makers.

Figure 15: Factors important when thinking about mobile provider – all mentions

Spontaneous/Prompted Mentions

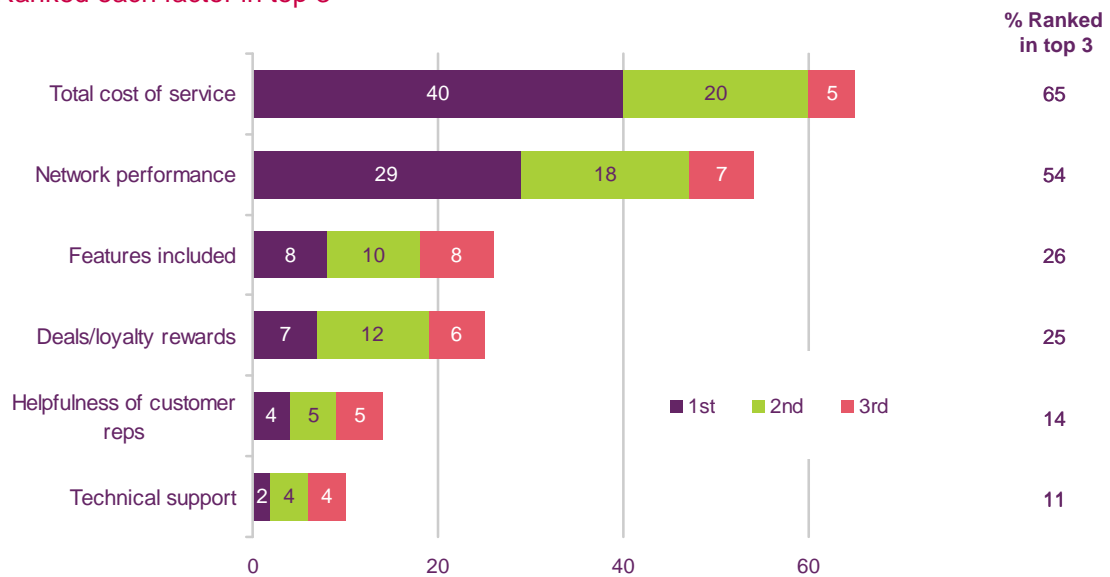


Source: Quality of Service Research – Q3a/b
 Base: All joint/sole decision makers for Mobile Phones (n=1535)

Figure 16 shows that the ranked order of these factors mirrors the number of mentions shown above, confirming that cost and network performance were the key priorities to mobile phone decision-makers by some margin.

Figure 16: Factors important when thinking about mobile provider – ranked order

% Ranked each factor in top 3



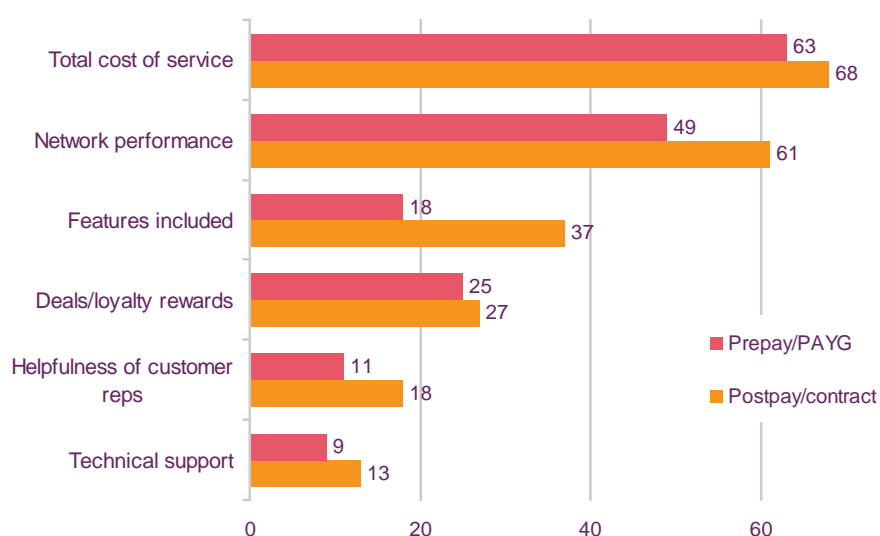
Source: Quality of Service Research – Q3c
 Base: All joint/sole decision makers for Mobile Phones (n=1535)

N.B. Excluded those who did not identify any issues as important

Some significant differences were apparent by payment method in this sector, as shown below. Those paying on a contract basis placing greater importance on all issues than PAYG users, particularly with regard to features (37% of contract customers and 18% of pre-pay customers placing this in the top three) and network performance (61% vs 49% respectively). This is indicative of the fact that contract customers have closer relationships with, and higher expectations of their service providers than pre-pay customers.

Figure 17: Factors important when thinking about mobile provider – by payment method

Total Top 3 Rankings



Source: Quality of Service Research – Q3c
 Base: All joint/sole decision makers for Mobile Phones (n=933/596)

N.B. Excluded those who did not identify any issues as important

Aspects consumers want to compare mobile providers on

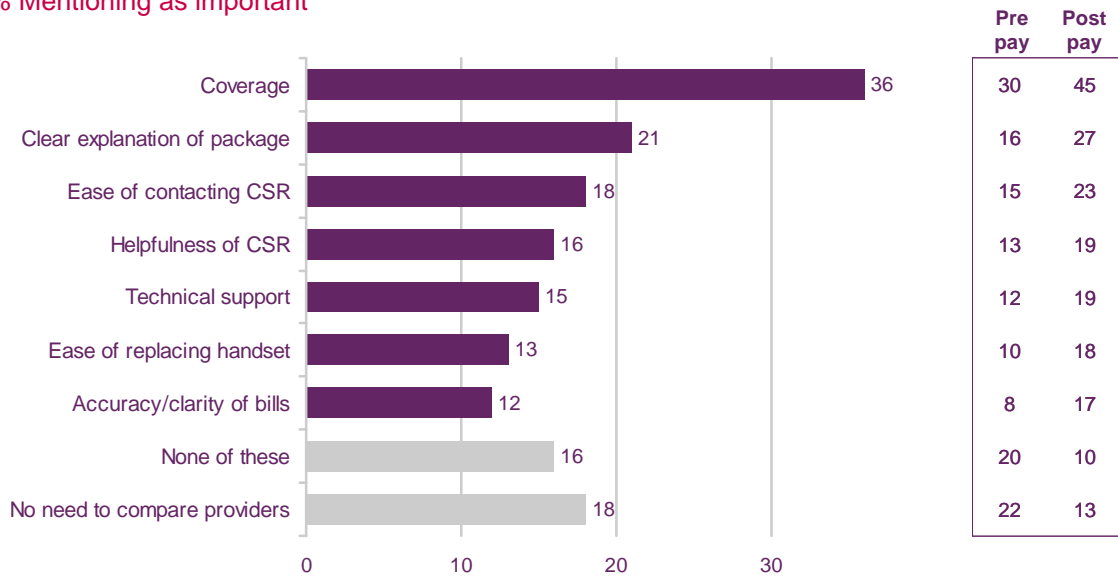
When asked to consider the individual elements comprising Quality of Service that were identified in the qualitative research, the most important by some considerable margin was coverage: 36% identified this as an important factor when choosing a supplier in this sector, rising to 45% among contract customers.

All the other aspects shown in Figure 18 related to customer service in some form or other and these were mentioned by far fewer mobile phone decision-makers.

It is noteworthy that around a third (34%) did not engage with any of these Quality of Service factors, either because they didn't regard any of them as important, or because they had no need to compare providers in this sector. This again indicates that there is a limit to the size of the potential demand for Quality of Service information on mobile phone providers.

Figure 18: QoS factors important when comparing / choosing mobile providers – all mentions

% Mentioning as important

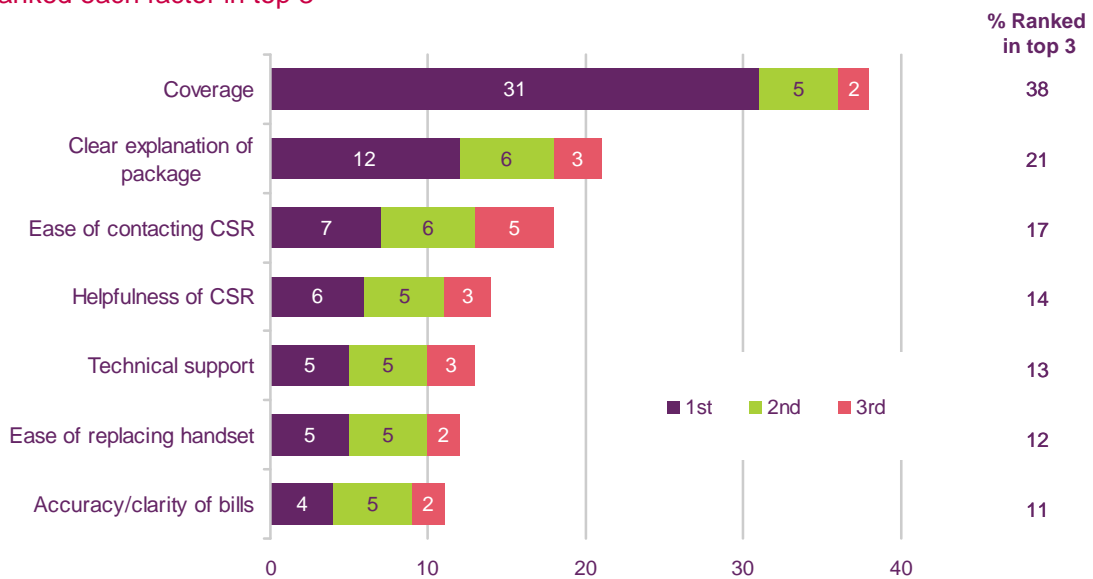


Source: Quality of Service Research – Q4e
 Base: All joint/sole decision makers for Mobile Phones (n=1535/933/596)

The ranked order of factors shown in Figure 19 clearly identifies coverage as the most important Quality of Service factor by some considerable margin, indicating a lead of 17 percentage points over the second most important factor – clear explanation of package. All other aspects fell into the top three for fewer than one in five consumers. These priorities suggest that if Quality of Service information is defined purely in terms of customer service, it could have a more limited impact on decision-making.

Figure 19: QoS factors important when comparing / choosing mobile providers – ranked order

% Ranked each factor in top 3



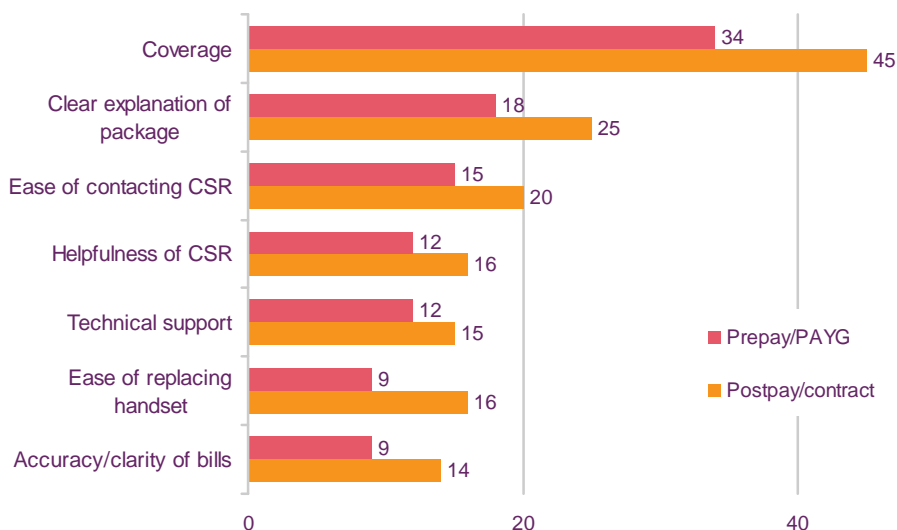
Source: Quality of Service Research – Q4f
 Base: All joint/sole decision makers for Mobile Phones (n=1535)

N.B. Excluded those who did not identify any issues as important

There are again marked differences between contract and pre-pay customers in terms of the priorities placed on Quality of Service. Those on contracts tended to regard all elements as being more important than PAYG customers, the gap being most significant on coverage (45% vs. 34% placing this in their top three respectively).

Figure 20: QoS factors important when comparing / choosing mobile providers – by payment method

Total Top 3 Rankings



Source: Quality of Service Research – Q4f
 Base: All joint/sole decision makers for Mobile Phones (n=933/596)

N.B. Excluded those who did not identify any issues as important

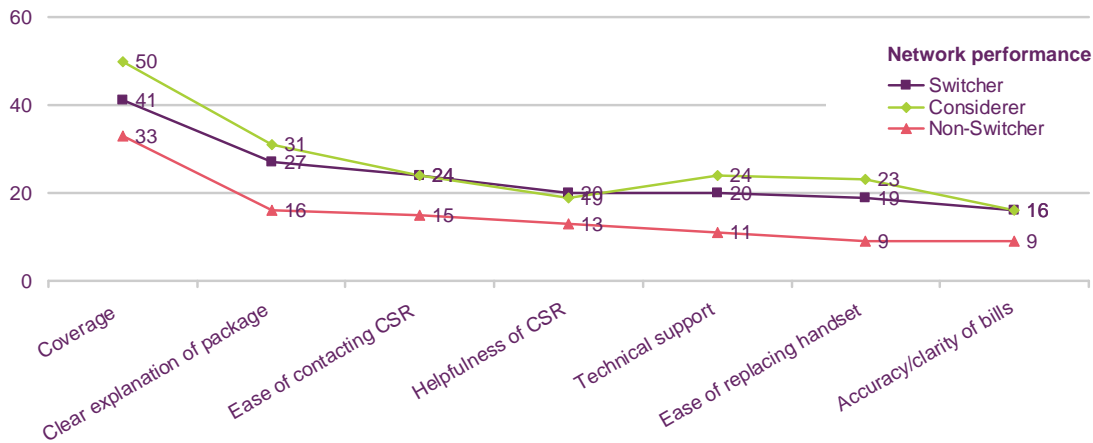
The research shows that the priority placed on Quality of Service factors also differed significantly based on levels of participation in the mobile sector. The incidence of the three participation segments identified for analysis purposes were as follows:

- ▶ Switchers (those who have switched supplier or asked their current supplier to match a better tariff or package deal in the last four years – as well as those who are actively looking for a new supplier at the moment) – (32%)
- ▶ Considerers (those who are open to the idea of a new supplier but have not yet switched or negotiated) - (7%)
- ▶ Non-switchers (those who have not switched or negotiated their contract in the past four years and who are not interested in a new supplier) – (60%)

Non-Switchers gave lower importance ratings to all the Quality of Service factors tested, as indicated in Figure 21.

Figure 21: QoS factors important when choosing / comparing mobile providers – by participation

% Mentioning QoS factor as important



Source: Quality of Service Research – Q4e analysed by Q8/9 segments
Base: Joint/sole decision makers for Mobile Phones in each segment

A few significant differences were also evident on socio-demographic variables:

- Coverage was equally important across different socio-demographic groups but was more important to those living in rural areas than urban areas.
- Technical support was more important to men than women, and to those who were single and/or renting.
- Importance of ease of obtaining replacement handsets was inversely correlated to age and was again more important to those who were single and/or renting, as well as to those in lower social classes and/or not working.
- Ease of accessing customer service and helpfulness of customer service representatives were most important to those of retirement age (65+) and those without access to the internet.
- Accuracy and clarity of billing was particularly important to older age groups (55+), those in lower socio-economic groups (DE) and those in rural areas.

Likelihood to use information

Respondents were asked to think about a scenario where they were switching or wanted to assess whether there were other mobile phone providers that would be more suitable than their current provider. Figure 22 shows how likely decision-makers felt they would be to use information on these Quality of Service aspects to compare the performance of different providers in this situation. (N.B. Respondents were asked to assume that the information would be available on all providers from a reliable source.)

This data indicates that the *stated intention* to use information was between 27% and 67% across the aspects of Quality of Service tested. More than half of all decision-makers in the

mobile phone sector claimed that they would be very or fairly likely to use seven different types of information, rising to 67% for information on coverage, reflecting the importance placed on this aspect of Quality of Service.

The other aspect of network performance that consumers most wanted to compare providers on was 'average time taken to resolve faults' (59% said they would be very or fairly likely to use this information compared to 44% who would use information on 'number of faults occurring').

The main element of customer service that decision-makers were most interested in comparing mobile phone providers on was the average time they would spend on hold when trying to get through to a customer service representative.

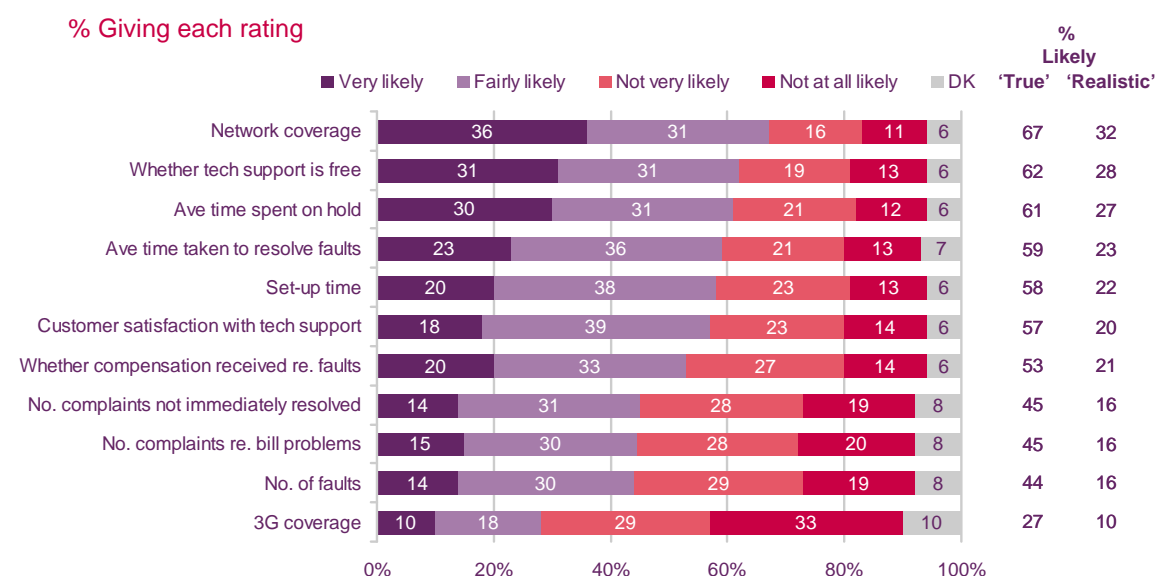
Figure 22 also shows the likely uptake of information based on a more conservative scenario, which assumes that 70% of those saying they were "very likely" to use the information and 20% of those saying "fairly likely" would actually do so in reality. On this basis overall likelihood to use Quality of Service information falls by as much as half, to between 10% and 32% depending on the type of information tested.

On the basis of these 'down-weighted' data, at least one in four decision-makers would compare mobile phone providers on the following factors:

- ▶▶ coverage (32%)
- ▶▶ whether technical support is free (28%)
- ▶▶ average time spent on hold (27%)
- ▶▶ average time taken to resolve faults (23%)

Interest in other types of Quality of Service information drops off to around a fifth.

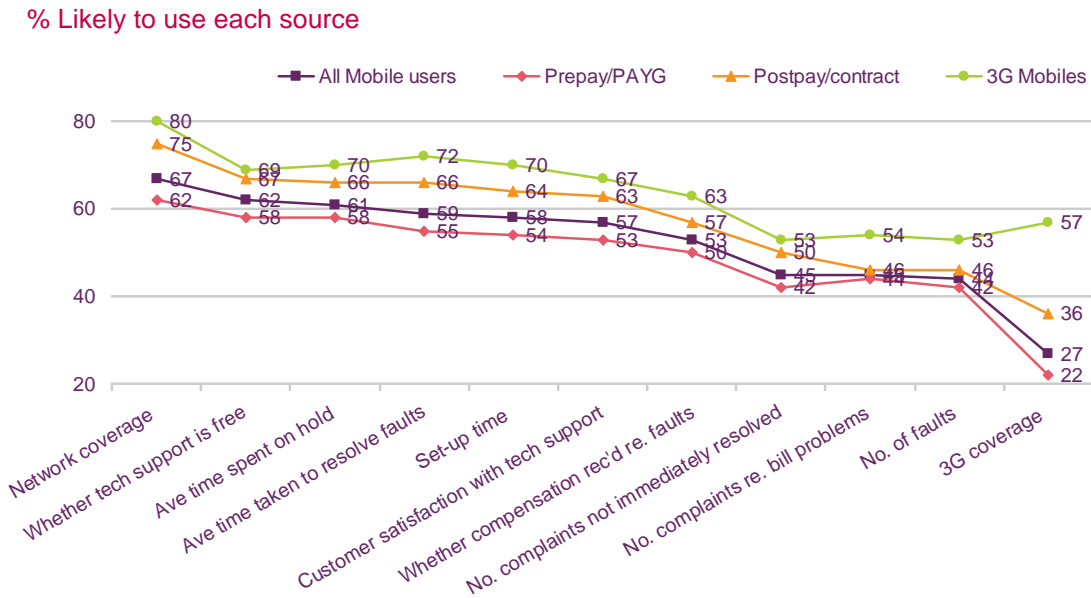
Figure 22: Likelihood to use information to compare mobile provider performance



Source: Quality of Service Research – Q5
 Base: All joint/sole decision makers for Mobile Phones (n=1535)

Figure 23 illustrates the significant differences that exist by payment method in terms of likely use of information. Those on PAYG service were significantly less likely to use any of these types of information, compared to either contract customers or those with 3G mobiles (who indicated the highest propensity to use Quality of Service information).

Figure 23: Likelihood to use information to compare mobile provider performance – by payment method



Source: Quality of Service Research – Q5
 Base: All joint/sole decision makers for Mobile Phones (n=1535/933/596/318)

Looking at overall likelihood to use Quality of Service information on the basis of stated intention, Considerers demonstrate significantly higher levels of interest across all the areas on which that information might be available, with likely uptake ranging from 57% to 73%. Experienced Switchers also have relatively high levels of interest: between 50% and 66%.

Figure 24 looks at the conservative estimates for likely uptake across the three key participation segments. Again, Considerers demonstrated the highest levels of interest in Quality of Service information across all the areas on which that information might be available, with likelihood to use ranging from 20% to 36%. Likelihood to use this type of information was most notably higher than either Switchers or Non-Switchers with regard to 'whether technical support is free' and 'average time taken to resolve faults'. Non-Switchers were the least interested, with likelihood to use ranging from 14% to 26%.

Figure 24: Likelihood to use information to compare mobile provider performance – by participation

DOWNWEIGHTED % Very /Fairly Likely to use each source

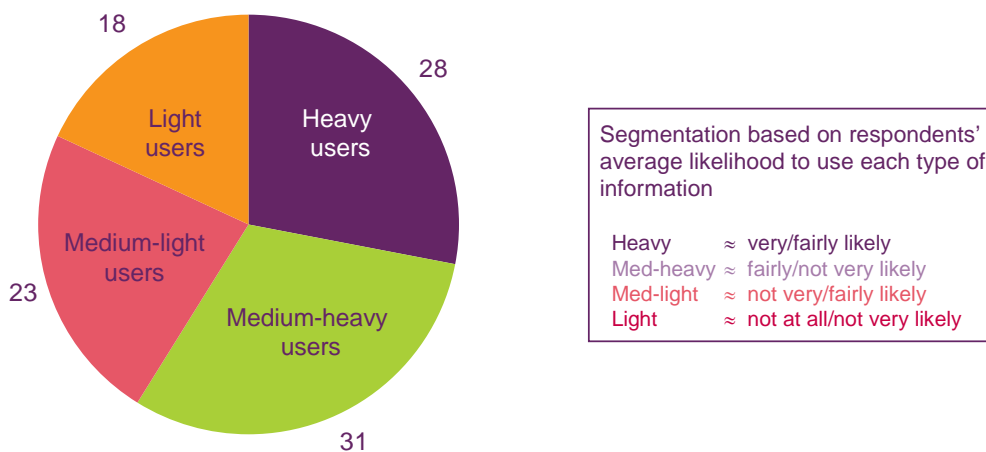


Source: Quality of Service Research – Q5
 Base: All joint/sole decision makers for each technology (n=1535/476/113/925)

The distribution of decision-makers in the mobile phone sector based on the four information usage segments is shown in Figure 25 below.

Figure 25: Profile of mobile sector by four usage segments

% in each segment



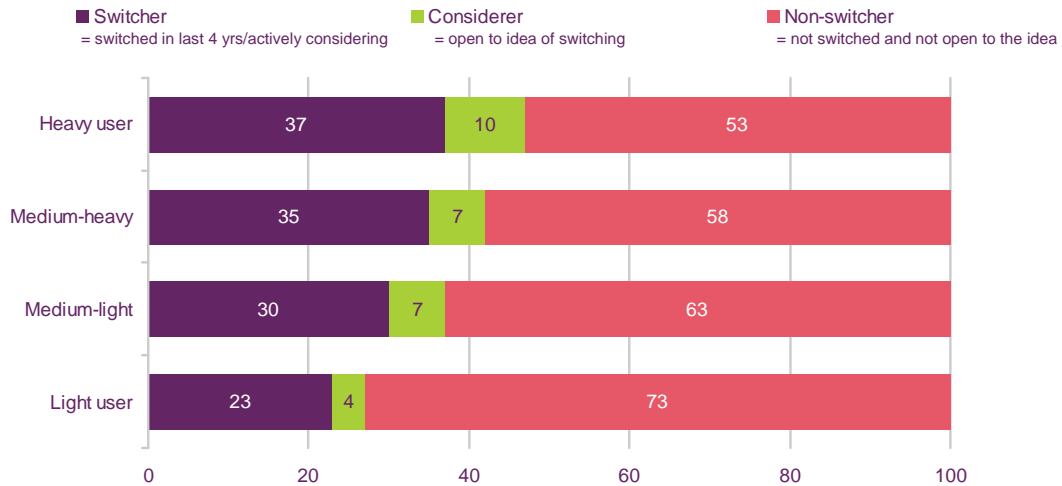
Source: Quality of Service Research – Q5
 Base: All joint/sole decision makers for Mobile Phones (n=1535)

Figure 26 shows the level of participation of these segments in the mobile phone sector. The data shows that Heavy Users were significantly more likely to have already re-entered the mobile phone sector or be open to doing so: 37% of Heavy Users were Switchers (experienced or actively looking) compared to 23% of Light Users – and 10% were

Considerers compared to 4% of Light Users. This is simply another way to establish that interest in Quality of Service information is highest amongst the more engaged segments of the mobile phone sector.

Figure 26: Levels of participation among four usage segments

% of each segment who have switched or might switch in the future

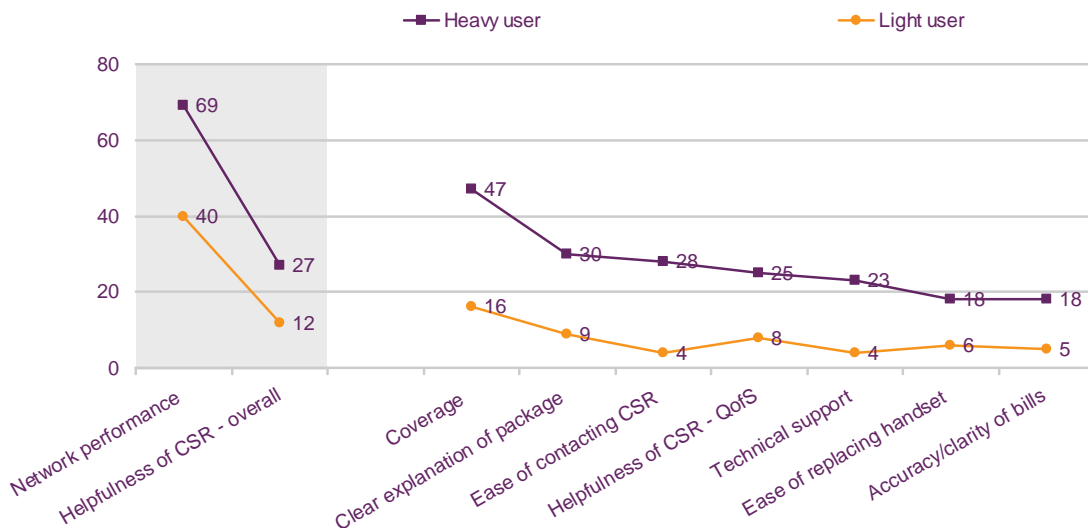


Source: Quality of Service Research – Q8/9 analysed by Q5 segments
 Base: All joint/sole decision makers for Mobile Phones in each segment (n=428/469/360/277)

Heavy Users again placed a higher importance on Quality of Service information. As shown in Figure 27, at an overall level, Heavy Users were almost twice as likely as Light Users to regard network performance as an important aspect of their mobile phone provider (69% compared to 40% respectively). They were more than twice as likely to regard customer service as a key driver (27% and 12% respectively) at an overall level. It follows that Heavy Users were more interested in comparing their mobile phone provider on all the elements constituting Quality of Service at a detailed level. The gap between Heavy and Light Users was most marked with regard to coverage, as is consistent with the priority placed on network performance at an overall level.

Figure 27: All factors important when choosing / comparing mobile providers – by usage segment

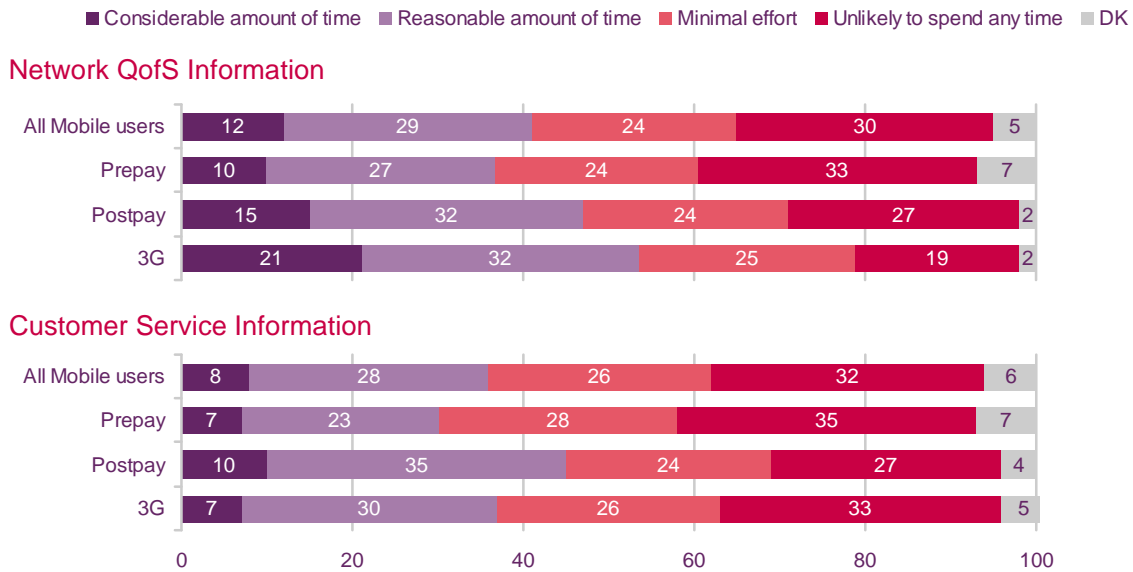
% of each segment mentioning factors as being important



Source: Quality of Service Research – Q3a/b, Q4 analysed by Q5 segments
 Base: All joint/sole decision makers for Mobile Phones in each segment (n=428/469/360/277)

Figure 28 shows that more than one in three decision-makers in the mobile phone sector (41%) would make at least a reasonable amount of effort to find information on network performance. Slightly fewer (36%) said they would make this degree of effort to find information on customer service. However, consumers were polarised on how much energy they would expend: almost as many said they were unlikely to spend any time looking for information on either of these two aspects of Quality of Service (30% and 32% respectively). Those on contracts were significantly more likely to make an effort to find these types of information than those on PAYG.

Figure 28: Length of time willing to spend searching for information on mobile providers



Source: Quality of Service Research – Q7
 Base: All joint/sole decision makers for Mobile Phones: Sample 1 (n=744/449/293/162), Sample 2 (n=791/484/303/156)

Most consumers in the mobile phone sector (47%) felt that a combination of subjective data (i.e. via a reliable customer satisfaction survey) as well as objective data (i.e. statistics based on actual service levels/performance), would be most valuable to them, as Figure 29 shows. This holds true regardless of payment method, although those with PAYG service were more likely to say they weren't interested in either of these types of information (14% vs 8% of contract customers and 5% of those with 3G mobiles).

Figure 29: Most valuable type of information on mobile providers – by payment method

% Stating each

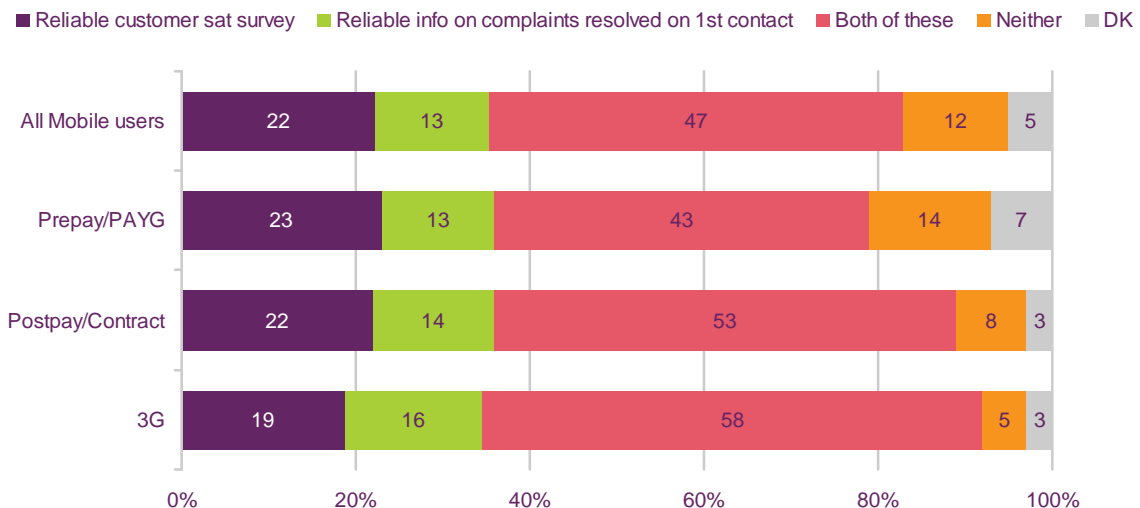
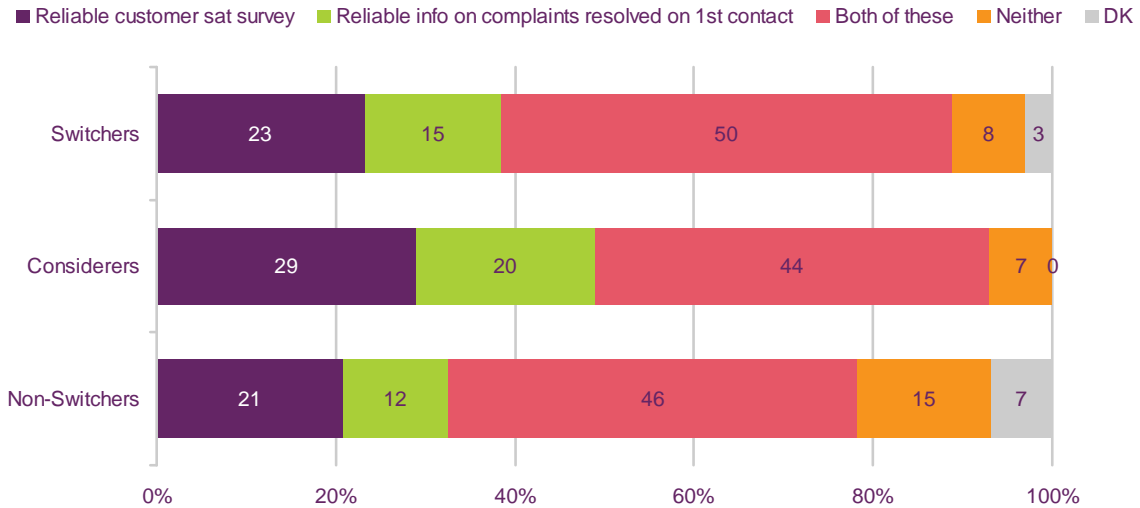


Figure 30 shows that this was consistent across the three key participation segments, although Considerers, the segment most likely to say they would use information, were more interested in customer satisfaction surveys than either of the other two segments (29% favoured this type of approach compared to 23% of Switchers and 21% of Non-Switchers).

Figure 30: Most valuable type of information on mobile providers – by participation

% Stating each



Source: Quality of Service Research – Q6
 Base: All joint/sole decision makers for Mobile Phones in each segment

Summary of findings in the mobile phone sector

When consumers were asked to think about what mattered to them in their mobile phone provider, the most important factors identified were the total cost of the service and the network coverage. Customer service was mentioned by fewer decision-makers in this sector and ranked lower in importance.

It follows that coverage was the most important element of Quality of Service for decision-makers when choosing a mobile phone provider. However it is important to point out that one in three were not engaged with any aspects of Quality of Service, either having no need to compare providers in this sector or not regarding any of the factors as important in the selection process.

The stated intentions of mobile phone decision-makers to use the different types of Quality of Service tested ranged from 27% to 67%. However this dropped to between 10% and 32% based on a more conservative estimate of how many consumers will do as they intend in reality. Likelihood to use all types of information was highest amongst those who have re-entered the sector (experienced switchers and those actively looking for a new supplier) and those who are open to the idea of a new supplier.

Information on network coverage was more likely to be used than any other type of Quality of Service information. On other aspects of network performance, Consumers were more likely to want to compare providers on the time taken to resolve faults as opposed to the overall number of faults occurring.

The customer service aspects that consumers were most likely to want to compare providers on were whether technical support is free and how long the average person spends on hold waiting to speak to a customer service representative.

Those on contracts regarded the various elements of Quality of Service as more important than those on PAYG. They also indicated higher levels of likely usage across all the different types of information tested. Previous Ofcom research indicates that contract users tend to spend more each month on their mobile than PAYG customers. This would assume higher use and at least partly explain the greater importance of reliability amongst contract customers compared to PAYG customers.

Those with 3G mobiles expressed even higher desire to compare providers on quality of service information, particularly in terms of 3G network coverage.

Most were seeking a balance of subjective information (from a reliable customer satisfaction survey) and objective information (in the form of factually based data on complaints resolved).

In the mobile phone sector, consumers were more likely to make an effort to find information on Quality of Service information related to network performance than customer service.

3.4 Broadband

Almost two in three respondents (64%) had broadband internet for personal use at home - 43% claimed to be the decision-maker for this technology and were therefore eligible for interview.

Overall satisfaction amongst broadband decision-makers was high: 88% were satisfied overall, 41% being “very” satisfied.

Participation in the broadband sector was slightly higher than in other sectors: two thirds (65%) of these users had not switched or negotiated their contract within the last four years and three quarters (78%) said they were not interested in switching to a new supplier in future. It follows that slightly fewer broadband decision-makers (12%) claimed not to be interested in comparing providers in this sector.

The proportion of consumers who either were, or might in future be interested in, re-entering this sector, will define the potential demand for “Quality of Service” information for broadband providers.

Aspects important to broadband consumers

Figure 31 shows that when asked to identify what factors were important when thinking about their broadband internet provider, network performance was just as likely to be mentioned as the total cost of the service in this sector: 72% and 73% respectively.

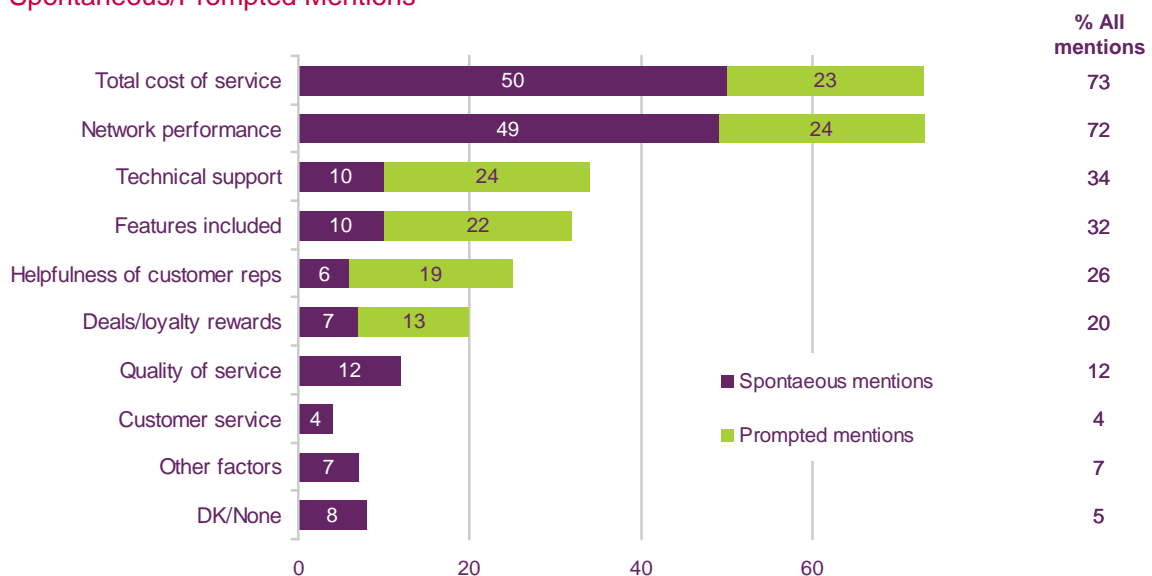
Technical support was mentioned by more than one in three broadband decision-makers (34%). This supports findings from the qualitative research that this can be a more demanding technology (particularly for the less technically savvy and for those who are more engaged with the service/more heavily dependent on it), which is more likely to “go wrong”. Only if the service is regarded as peripheral (manifested in the feeling that one ‘ought’ to have a connection) might it simply be taken as part of a package and bought purely as a commodity, on the basis of price.

The other key dimensions of Quality of Service (customer service reps and loyalty rewards) were less important aspects of the broadband provider: 26% and 20% respectively.

“Quality of Service” as a generic category was mentioned by few (12%) of decision-makers.

Figure 31: Factors important when thinking about broadband provider – all mentions

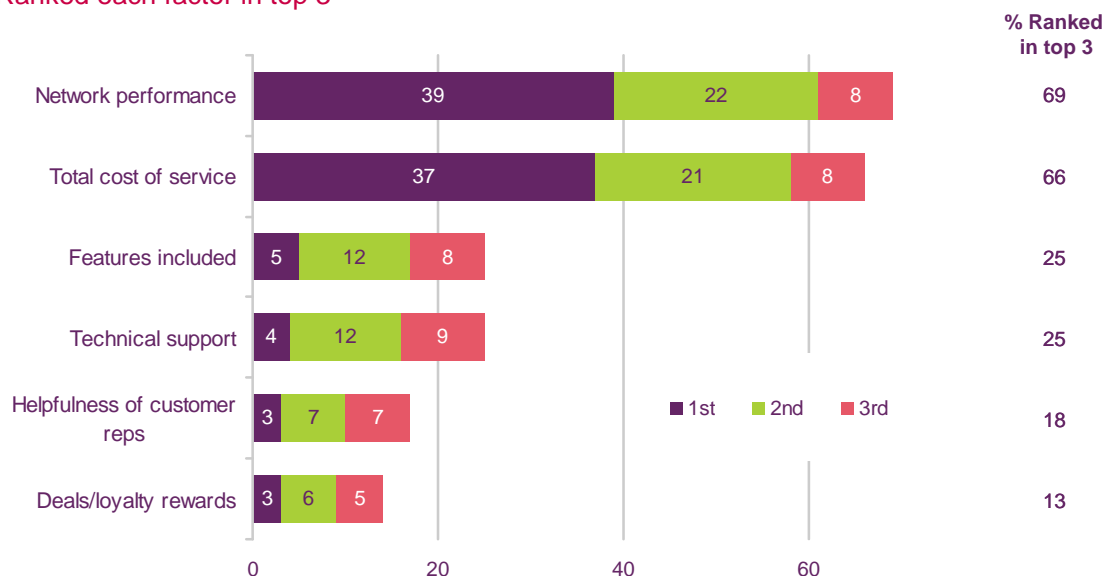
Spontaneous/Prompted Mentions



When asked to rank these factors, network performance becomes the highest priority, followed closely by cost, as shown in Figure 32. Otherwise the ranking mirrors the number of mentions shown previously.

Figure 32: Factors important when thinking about broadband provider – ranked order

% Ranked each factor in top 3



Source: Quality of Service Research – Q3c
 Base: All joint/sole decision makers for Broadband Internet (n=894)

N.B. Excluded those who did not identify any issues as important

Aspects broadband consumers want to compare

When asked to consider the individual elements comprising Quality of Service that were identified in the qualitative research, the most important priority when comparing broadband providers was connection speed (47%) followed by connection reliability (40%), both of which led the other factors by some margin.

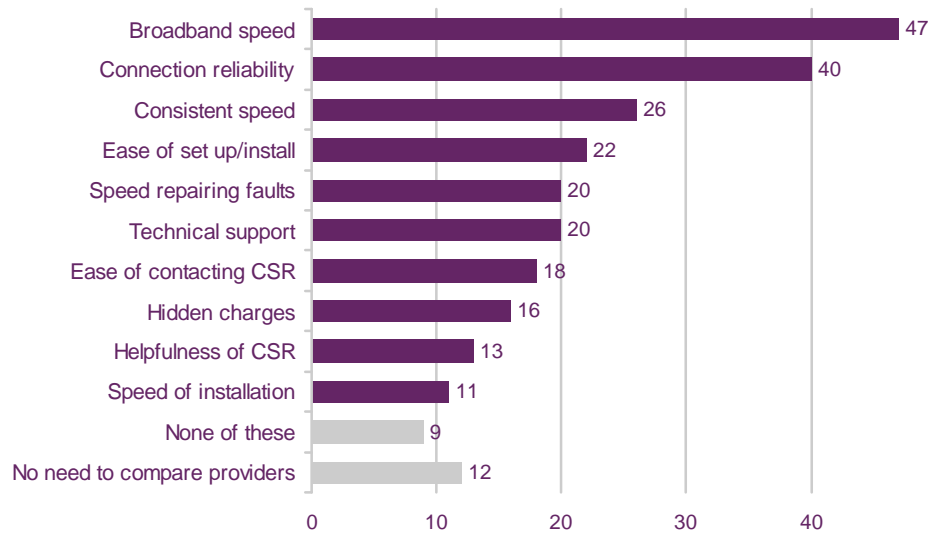
In third position was a third dimension of network performance, consistent speed, which was mentioned by more than one in four broadband decision-makers (26%).

All the other aspects shown in Figure 33 related to customer service in some form or other and these were mentioned by far fewer respondents.

Around a fifth (21%) did not engage with any of these Quality of Service factors, either because they didn't regard any of them as important, or because they had no need to compare providers in this sector. This is significantly fewer than in other sectors, suggesting that the demand for Quality of Service information could potentially be greater for this technology.

Figure 33: QoS factors important when comparing / choosing broadband providers – all mentions

% Mentioning as important

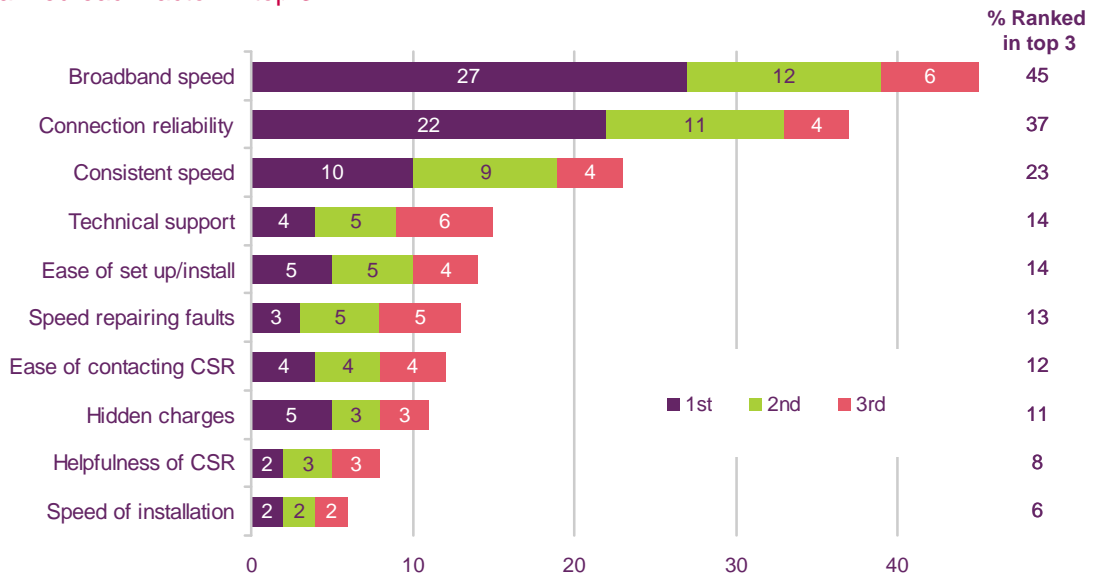


Source: Quality of Service Research – Q4c
 Base: All joint/sole decision makers for Broadband Internet (n=894)

The ranked order of factors shown in Figure 34 clearly identifies the three dimensions of network performance as the first, second and third most important Quality of Service factors (ranked in the top three by 45%, 37% and 23% respectively). The other customer service elements, including technical support, were mentioned by significantly fewer respondents, again suggesting that if Quality of Service information is defined purely in terms of customer service, it could have a more limited impact on decision-making.

Figure 34: QoS factors important when comparing / choosing broadband providers – ranked order

% Ranked each factor in top 3



Source: Quality of Service Research – Q4d
 Base: All joint/sole decision makers for Broadband Internet (n=894)

N.B. Excluded those who did not identify any issues as important

The research shows that the priority placed on Quality of Service factors also differed significantly based on levels of participation in the broadband sector. Three participation segments were identified for analysis purposes:

- ▶ Switchers (those who have switched supplier or asked their current supplier to match a better tariff or package deal in the last four years – as well as those who are actively looking for a new supplier at the moment) – (37%)
- ▶ Considerers (those who are open to the idea of a new supplier but have not yet switched or negotiated) - (10%)
- ▶ Non-switchers (those who have not switched or negotiated their contract in the past four years and who are not interested in a new supplier) – (53%)

Non-Switchers gave lower importance ratings to all the Quality of Service factors tested, as indicated in Figure 35. The other two segments were reasonably similar in their patterns of response with the exception of speed and reliability of connection, which were more relevant to Considerers, implying that these could potentially be triggers for switching.

Figure 35: QoS factors important when comparing / choosing broadband providers – by participation

% Mentioning QoS factor as important



A few significant differences were also evident on socio-demographic variables:

- Speed was more important to younger age groups and to renters.
- Connection reliability was more important to men than women, more to those married/living as married than to singles, more to property owners than renters and more to those living in urban areas than in rural areas.
- Ease of set-up/installation was more important to families.
- Technical support was more important to men, to those in the lowest socio-economic group (DE), to young singles / renters / those without children as well as to those in older age groups, and also to those in rural areas.

- Speed of repairing faults and speed of installation were most important to those of retirement age (65+) as well as to the youngest age groups / renters – and speed of installation was more important to those living in rural areas.
- Ease of accessing customer service and helpfulness of the customer service representative were more important to those without children, renters and those who were not working. While ease of accessing customer service was more important to men than women, helpfulness of the customer service representative was more important to men than women. Helpfulness was also inversely correlated to social grade, possibly indicating that younger and/or less well educated consumers require more help.
- Hidden charges were more of an issue to men than women, to those without children, not working, DEs and those in rural areas. They also increased in importance with age.

Likelihood to use information

Respondents were asked to think about a scenario where they were switching or wanted to assess whether there were other broadband providers that would be more suitable than their current provider. Figure 36 shows how likely decision-makers felt they would be to use information on these Quality of Service aspects to compare the performance of different providers in this situation. (N.B. Respondents were asked to assume that the information would be available on all providers from a reliable source.)

This data indicates that the *stated intention* to use information was between 51% and 75% across the aspects of Quality of Service tested. More than half of all decision-makers in the broadband sector claimed that they would be very or fairly likely to use all ten types of information, rising to over 70% for information on connection speeds and free technical support, reflecting the importance placed on these aspects of Quality of Service.

The other aspect of network performance that consumers most wanted to compare providers on was not the number of faults occurring but the average time taken to resolve them.

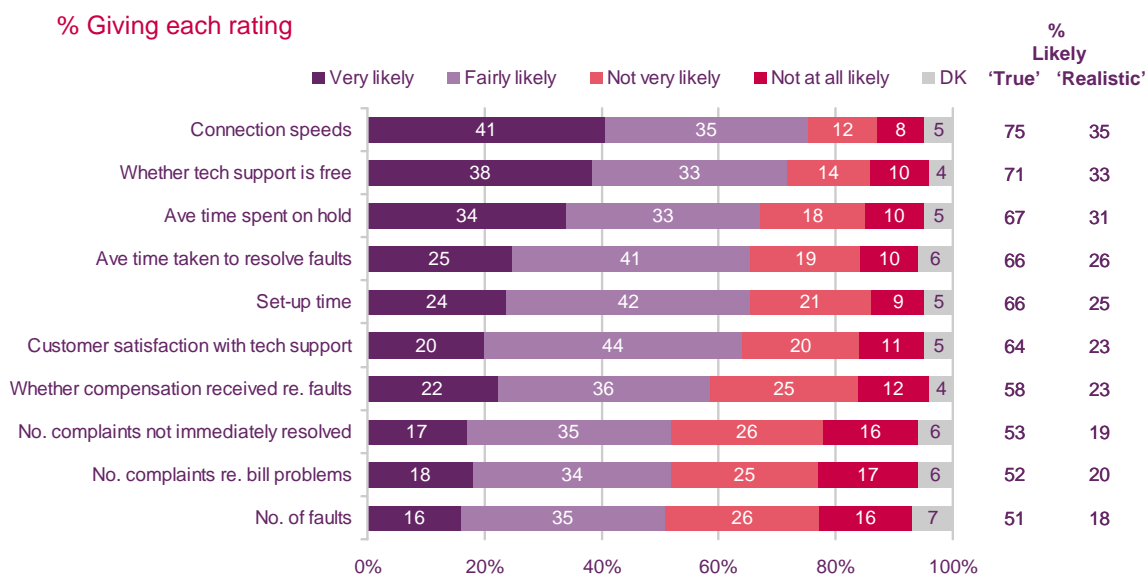
Aside from whether or not technical support is free, the main element of customer service that decision-makers in this sector were most interested in comparing providers on was the average time they would spend on hold when trying to get through to a customer service representative.

Figure 36 also shows the likely use of information based on a more conservative scenario, which assumes that 70% of those saying they were “very likely” to use the information and 20% of those saying “fairly likely” would actually do so in reality. On this basis overall likelihood to use Quality of Service information falls by at least half, to between 18% and 35%, with more than three in ten decision-makers wanting to compare broadband internet providers on the following factors:

- ▶ connection speeds (35%)
- ▶ whether technical support is free (33%)
- ▶ average time spent on hold (31%)

Interest in other types of Quality of Service information drops off to a quarter or less.

Figure 36: Likelihood to use information to compare broadband provider performance



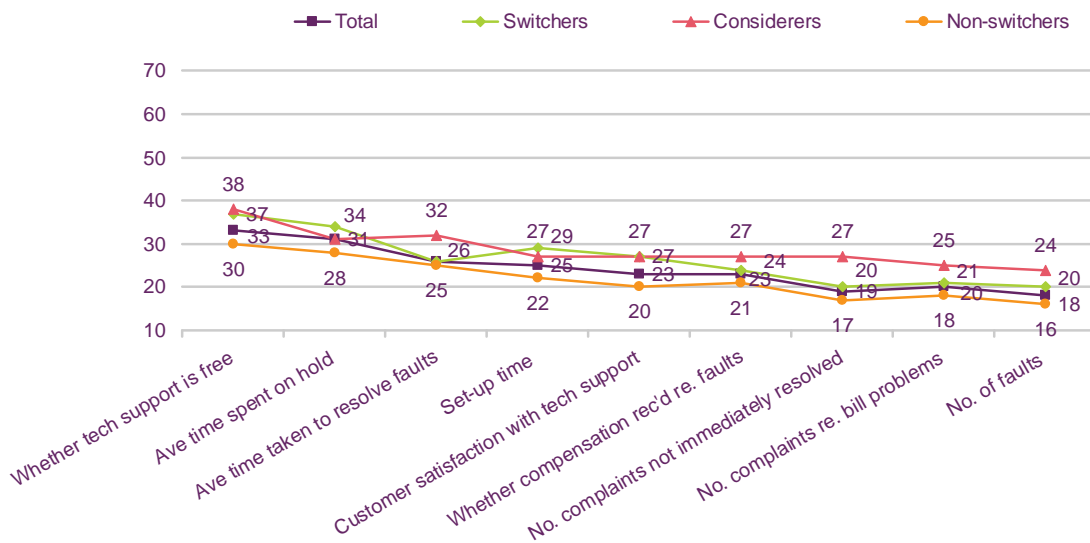
Source: Quality of Service Research – Q5
 Base: All joint/sole decision makers for Broadband Internet (n=894)

Looking at overall likelihood to use Quality of Service information on the basis of stated intention, Considerers demonstrate significantly higher levels of interest across all the areas on which that information might be available, with likelihood to use ranging from 61% to 82%.

Figure 37 looks at the conservative estimates for likely uptake across the three key participation segments. Again, Considerers demonstrated the highest levels of interest in Quality of Service information across all the areas on which that information might be available, with likelihood to use ranging from 24% to 38%. Likelihood to use this type of information was most notably higher than either Switchers or Non-Switchers with regard to 'complaints not immediately resolved', identifying this as a potential switching trigger. Non-Switchers were the least interested, with likelihood to use ranging from 16% to 30%. However the difference between the participation segments was less extreme in this sector compared to the fixed and mobile sectors.

Figure 37: Likelihood to use information to compare broadband provider performance – by participation

DOWNWEIGHTED % Very /Fairly Likely to use each source

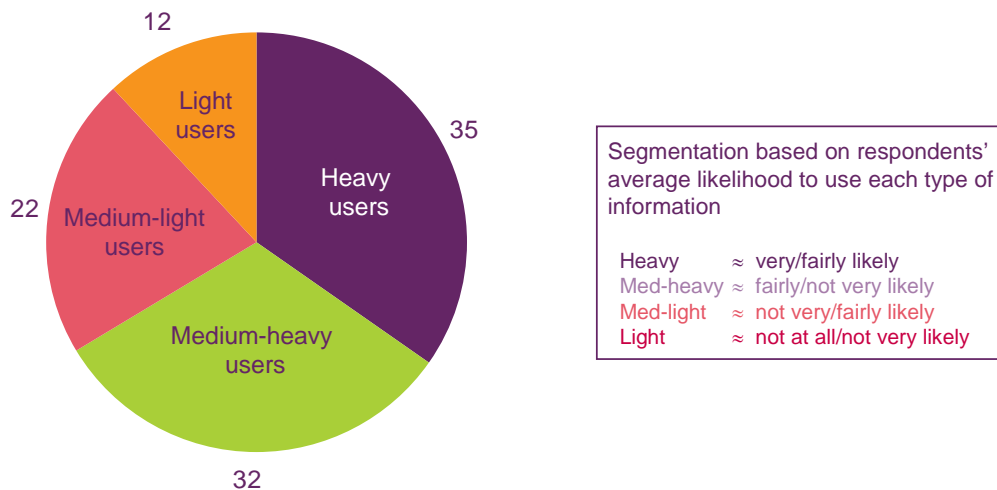


Source: Quality of Service Research – Q5
 Base: All joint/sole decision makers for each technology (n=894/315/88/477)

The distribution of decision-makers in the broadband sector based on the four information usage segments is shown in Figure 38 below.

Figure 38: Profile of broadband sector by four usage segments

% in each segment



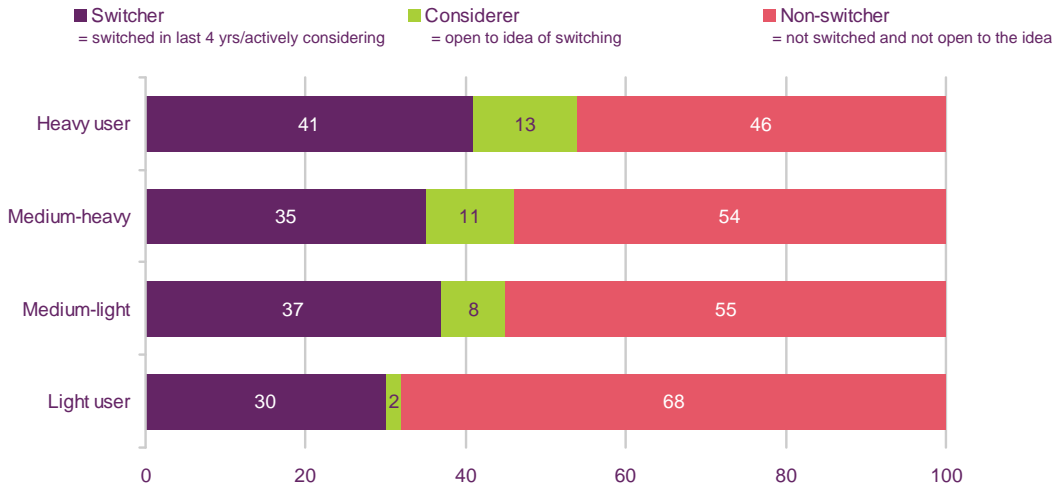
Source: Quality of Service Research – Q5
 Base: Joint/sole decision makers for Broadband Internet (n=894)

Figure 39 shows participation levels among these segments in the broadband sector. The data shows that Heavy Users were significantly more likely to have already re-entered the broadband sector or be open to doing so: 41% of Heavy Users were Switchers (experienced or actively looking) compared to 30% of Light Users – and 13% were Considerers compared

to 2% of Light Users. This is simply another way to establish that interest in Quality of Service information is highest amongst the more engaged segments of the sector.

Figure 39: Levels of participation among four usage segments

% of each segment who have switched or might switch in the future

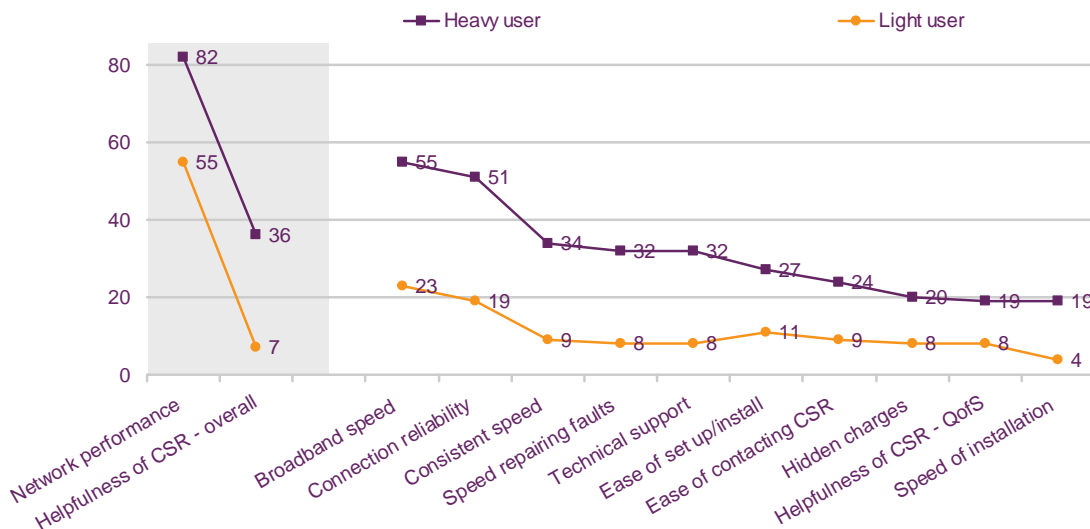


Source: Quality of Service Research – Q8/9 analysed by Q5 segments
 Base: All joint/sole decision makers for Broadband Internet in each segment (n=313/285/193/104)

In this sector, Heavy Users again placed a higher importance on Quality of Service information. As shown in Figure 40, at an overall level, Heavy Users were markedly more likely than Light Users to regard network performance as an important aspect of their broadband provider (82% compared to 55% respectively). They were also more likely to regard customer service as a key driver (36% and 7% respectively) although this was much less important at an overall level. It follows that Heavy Users were more interested in comparing their broadband provider on all the elements constituting Quality of Service at a detailed level. The gap between Heavy and Light Users was most marked on speed and reliability of connection, aligning with the importance of network performance overall.

Figure 40: All factors important when choosing / comparing broadband providers – by usage segment

% of each segment mentioning factors as being important

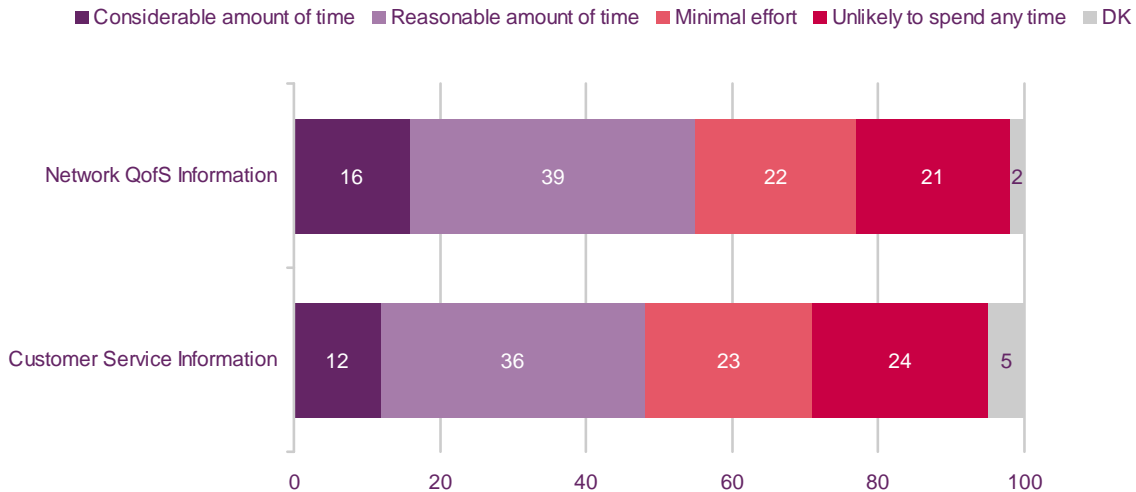


Source: Quality of Service Research – Q3a/b, Q4 analysed by Q5 segments
 Base: All joint/sole decision makers for Broadband Internet in each segment (n=313/285/193/104)

Figure 41 shows that more than half of all broadband decision-makers (55%) said they would spend a reasonable or a considerable amount of time looking for information on network performance. A similar proportion (48%) said they would make this degree of effort to find information on customer service. Significantly fewer consumers in this sector were unlikely to spend any time looking for information on these Quality of Service aspects (21% and 24% respectively) compared to consumers in the fixed and mobile sectors.

Figure 41: Length of time willing to spend searching for information on broadband providers

% Stating each

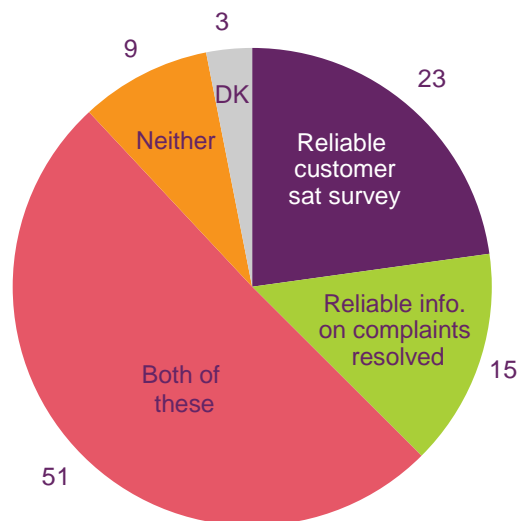


Source: Quality of Service Research – Q7
 Base: All joint/sole decision makers for Broadband Internet: Sample 1 (n=424), Sample 2 (n=470)

Most consumers in this sector felt that the most valuable way to provide information on Quality of Service was via a combination of subjective data (i.e. via a reliable customer satisfaction survey) as well as objective data (i.e. statistics based on actual service levels/performance), as Figure 42 shows.

Figure 42: Most valuable type of information on broadband providers

% Stating each

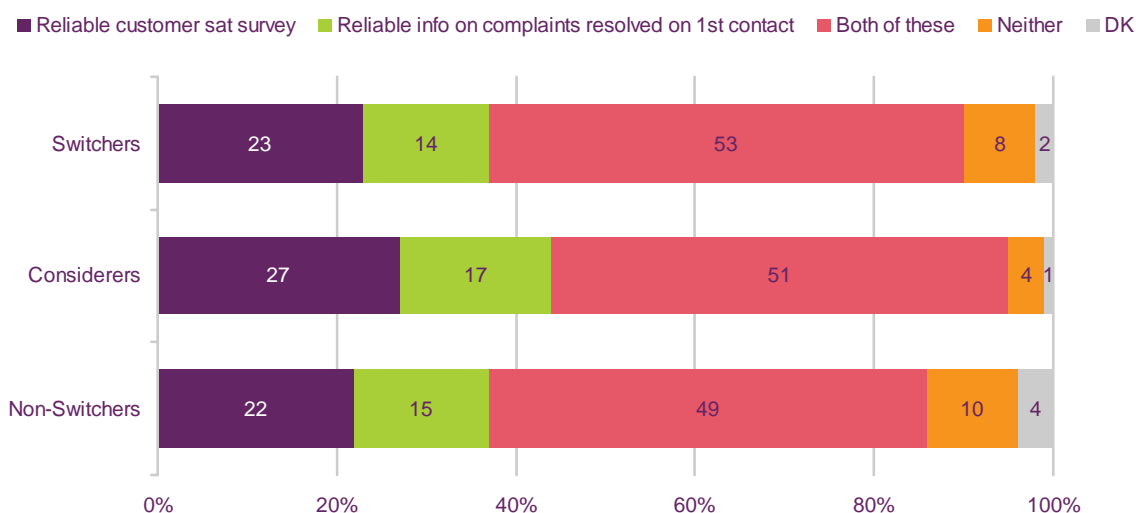


Source: Quality of Service Research – Q6
 Base: All joint/sole decision makers for Broadband Internet (n=894)

Figure 43 shows that this was consistent across the three key participation segments, although Considerers were slightly more interested in customer satisfaction surveys than the other two segments (27% compared to 23% among Switchers and 22% among Non-Switchers).

Figure 43: Most valuable type of information on broadband providers – by participation

% Stating each



Source: Quality of Service Research – Q6
 Base: All joint/sole decision makers for Broadband Internet in each segment

Summary of findings in the broadband sector

When consumers were asked to think about what mattered to them in their broadband internet provider, the total cost of the service and the network coverage tied as the most important factors. Customer service was mentioned by fewer decision-makers in this sector and ranked lower in importance.

It follows that speed and reliability of connection were the two most important elements of Quality of Service for decision-makers when choosing a broadband internet provider, followed by consistency of speed. Only one in eight were not engaged with any aspects of Quality of Service, either having no need to compare providers in this sector or not regarding any of the factors as important in the selection process.

The stated intentions of broadband decision-makers to use the different types of Quality of Service tested ranged from 51% to 75%. However this dropped to between 18% and 35% based on a more conservative estimate of how many consumers will do as they intend in reality. Likelihood to use all types of information was highest amongst those who have re-entered the sector (experienced switchers and those actively looking for a new supplier) and those who are open to the idea of a new supplier. However, differences by participation were less marked in this sector.

Information on connection speed was more likely to be used than any other type of Quality of Service information. As far as other aspects of network performance were concerned, consumers were more likely to want to compare broadband providers on the time taken to resolve faults as opposed to the overall number of faults occurring.

The customer service aspects that consumers were most likely to want to compare providers on were whether technical support is free and how long the average person spends on hold waiting to speak to a customer service representative.

Most were seeking a balance of subjective information (from a reliable customer satisfaction survey) and objective information (in the form of factually based data on complaints resolved).

In the broadband sector, consumers were more likely to make an effort to find information on Quality of Service, with a slightly greater willingness to invest time looking for network performance information than customer service.

3.5 Pay TV

Around one in three respondents (34%) had Pay TV for personal use at home – 25% claimed to be the decision-maker for this technology and were therefore eligible for interview.

Overall satisfaction amongst Pay TV decision-makers was high: 87% were satisfied overall, 42% being “very” satisfied.

Participation in the Pay TV sector was low in comparison to the other communications sectors: most (83%) of these users had not switched or negotiated their contract within the last four years and a similarly high proportion (81%) said they were not interested in switching to a new supplier in future. This reflects the lack of competition in this sector compared to other communications services and it is not therefore surprising that one in four Pay TV decision-makers (25%) claimed not to be interested in comparing providers in this sector – a higher percentage than in any other sector.

This is important contextual information given that the proportion of Pay TV consumers re-entering this sector will define the potential demand for “Quality of Service” information for Pay TV providers.

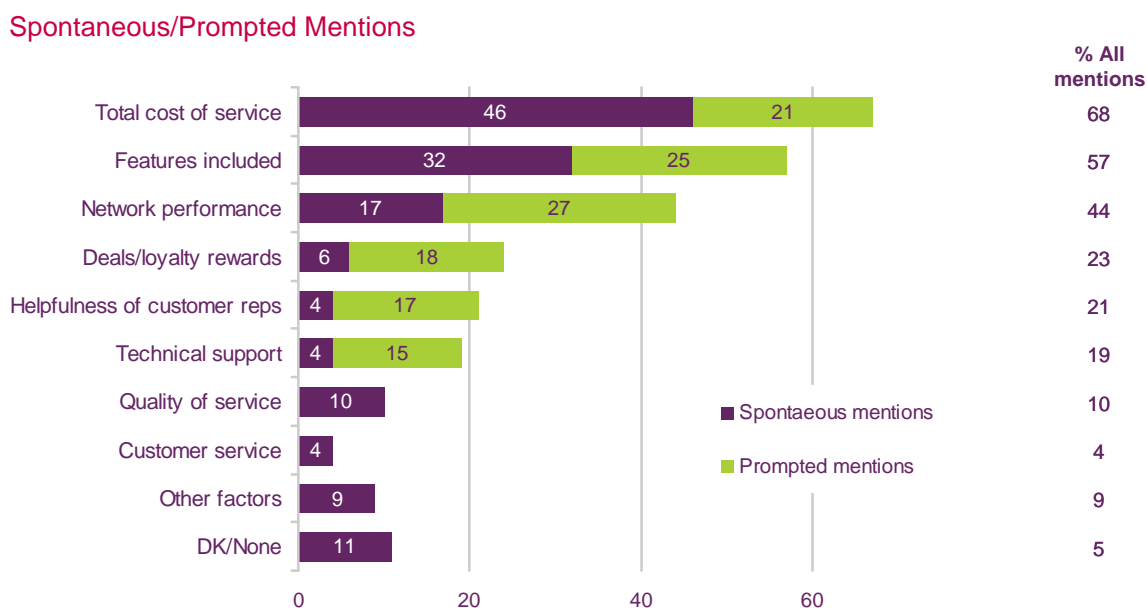
Aspects important to Pay TV consumers

Figure 44 shows that when asked to identify what factors were important when thinking about their Pay TV provider, the total cost of the service was the most relevant influence on provider perceptions (mentioned by 68% of consumers). Features were the next most important factor (57%), reflecting the fact that this sector is heavily content driven as the qualitative research highlighted.

Network performance was the third most important factor, being mentioned by more than two in five Pay TV decision-makers (17% unprompted and 27% prompted).

The other elements of Quality of Service were less important aspects of providers. “Quality of Service” as a generic category was mentioned by few (10%) of decision-makers.

Figure 44: Factors important when thinking about Pay TV provider – all mentions

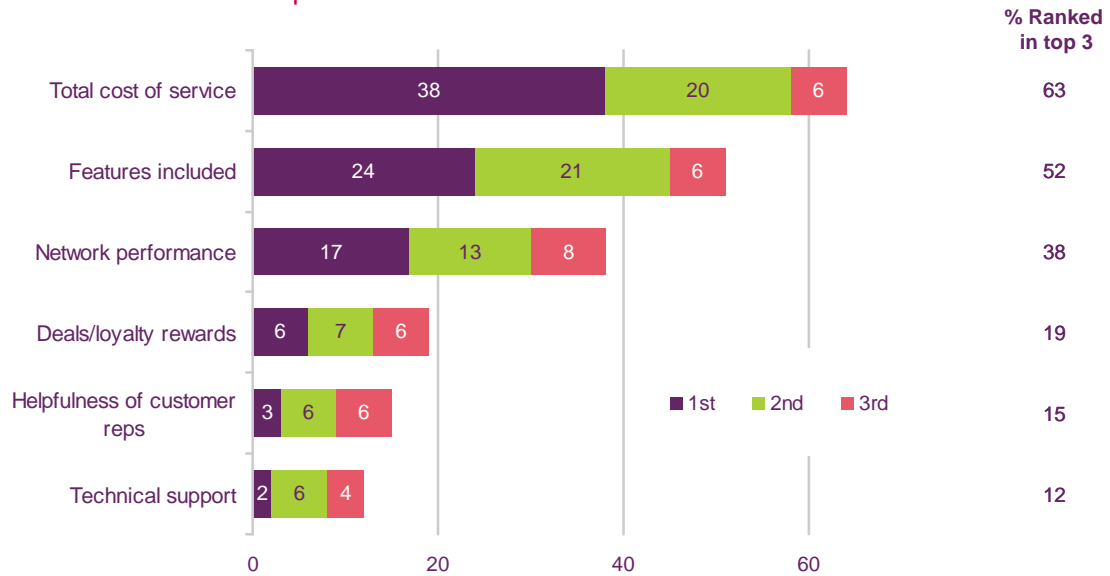


Source: Quality of Service Research – Q3a/b
 Base: All joint/sole decision makers for Pay-TV (n=530)

Figure 45 shows that the ranked order of these factors mirrors the number of mentions shown above. This confirms that cost was the greatest priority to consumers, followed by features and then network performance.

Figure 45: Factors important when thinking about Pay TV provider – ranked order

% Ranked each factor in top 3



Source: Quality of Service Research – Q3c
 Base: All joint/sole decision makers for Pay-TV (n=530)

N.B. Excluded those who did not identify any issues as important

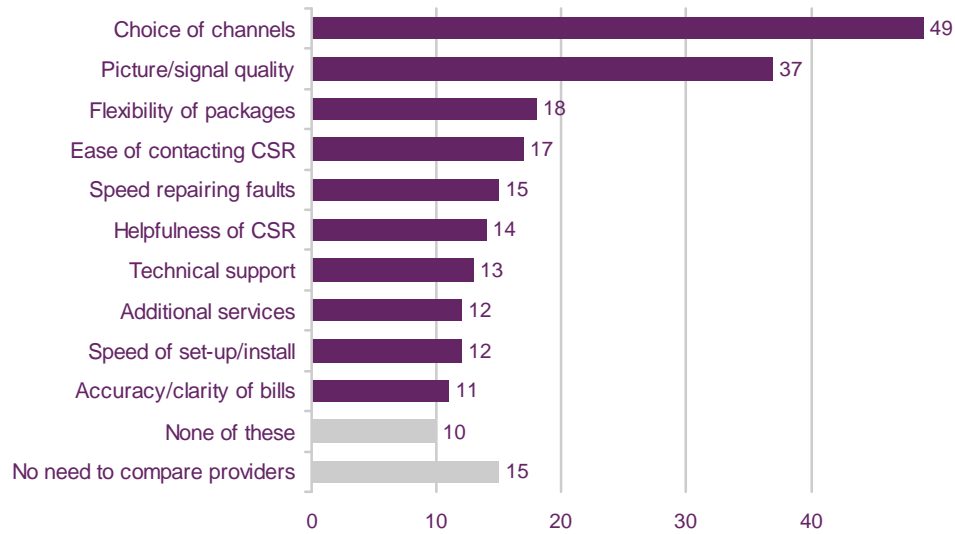
Aspects Pay TV consumers want to compare

When asked to consider the individual elements comprising Quality of Service that were identified in the qualitative research, the most important priority by some margin was choice of channels (mentioned by 49% of consumers), again reflecting the content driven nature of this sector. This was closely followed by picture/signal quality (37%), an aspect of network performance that was a far greater priority than any of the other customer service elements tested (none of which were mentioned by more than one in five decision-makers).

Figure 46 also shows that around a quarter (25%) did not engage with any of these Quality of Service factors, either because they didn't regard any of them as important, or because they had no need to compare providers in this sector.

Figure 46: QoS factors important when comparing / choosing Pay TV providers – all mentions

% Mentioning as important

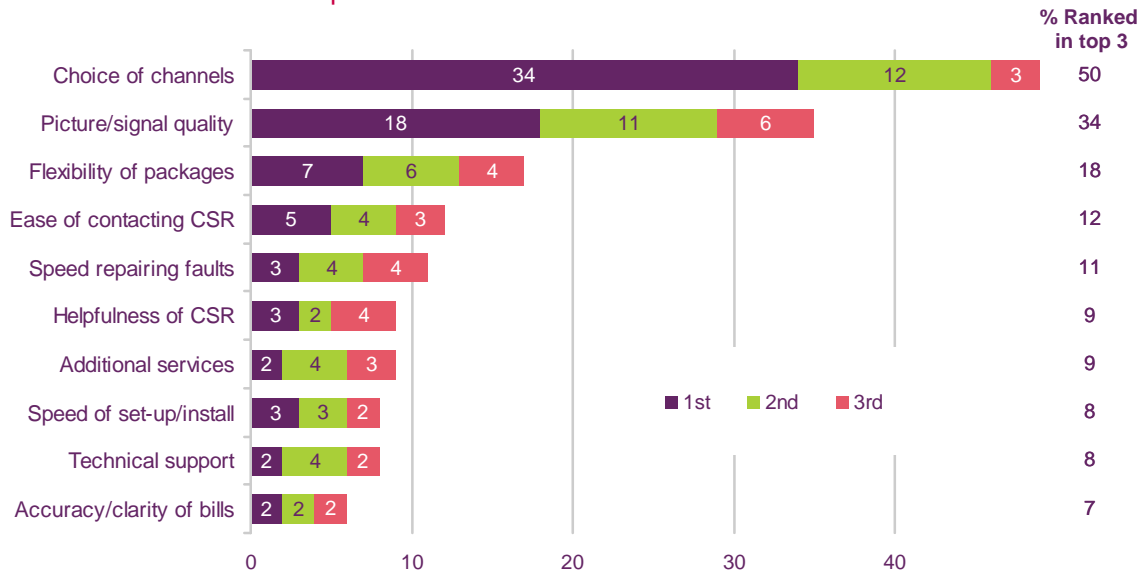


Source: Quality of Service Research – Q4g
 Base: All joint/sole decision makers for Pay-TV (n=530)

The ranked order of factors shown in Figure 47 mirrors the number of mentions described above, confirming that choice of channels is the factor that consumers most want to compare providers on, followed by picture/signal quality.

Figure 47: QoS factors important when comparing / choosing Pay TV providers – ranked order

% Ranked each factor in top 3



Source: Quality of Service Research – Q4h
 Base: All joint/sole decision makers for Pay-TV (n=530)

N.B. Excluded those who did not identify any issues as important

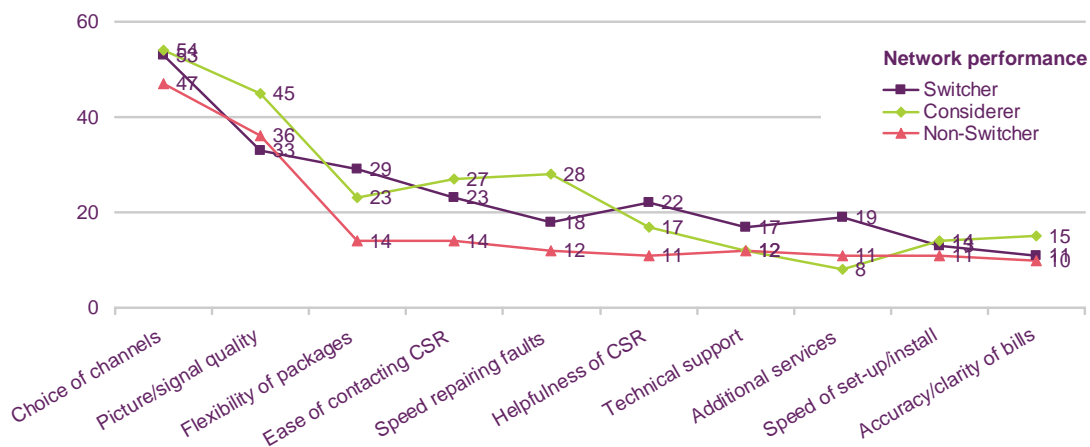
The research shows that the priority placed on Quality of Service factors also differed significantly based on levels of participation in the Pay TV sector. Three participation segments were identified for analysis purposes:

- ▶ Switchers (those who have switched supplier or asked their current supplier to match a better tariff or package deal in the last four years – as well as those who are actively looking for a new supplier at the moment) – (18%)
- ▶ Considerers (those who are open to the idea of a new supplier but have not yet switched or negotiated) - (13%)
- ▶ Non-switchers (those who have not switched or negotiated their contract in the past four years and who are not interested in a new supplier) – (69%)

Non-switchers tended to give lower importance ratings to all the Quality of Service factors tested, while Switchers tended to give the highest importance ratings, as indicated in Figure 48.

Figure 48: QoS factors important when choosing / comparing Pay TV providers – by participation

% Mentioning QoS factor as important



Source: Quality of Service Research – Q4g analysed by Q8/9 segments
Base: Joint/sole decision makers for Pay TV in each segment

A few significant differences were also evident on socio-demographic variables:

- Choice of channels and picture/signal quality were universally important across all sub-groups.
- Package flexibility was more important to women, to younger age groups and to those living in rural areas.
- Speed of set-up/installation was more important to men than women, to renters, those who are not working and those living in rural areas.
- Availability of additional services was most important to ABs, those with internet access and those living in urban areas.

- Technical support was more important to women than men, to families, to renters and also to those in rural areas.
- Ease of accessing customer service and helpfulness of the customer service representative were most important to those of retirement age (65+), DEs and renters. Helpfulness was particularly important to those living in rural areas.
- Speed of repairing faults was particularly important to families and those without internet access.
- The importance of accuracy / clarity of billing was more important to DEs, families and those without internet access.

Likelihood to use information

Respondents were asked to think about a scenario where they were switching or wanted to assess whether there were other Pay TV providers that would be more suitable than their current provider. Figure 49 shows how likely decision-makers felt they would be to use information on these Quality of Service aspects to compare the performance of different providers in this situation. (N.B. Respondents were asked to assume that the information would be available on all providers from a reliable source.)

This data indicates that the *stated intention* to use information was between 49% and 66% across the aspects of Quality of Service tested. At least half of all decision-makers in the Pay TV sector claimed that they would be very or fairly likely to use all nine types of information.

Despite the importance of picture/signal quality, the aspect of network performance that consumers most wanted to compare providers on was not the number of faults occurring but the average time taken to resolve them.

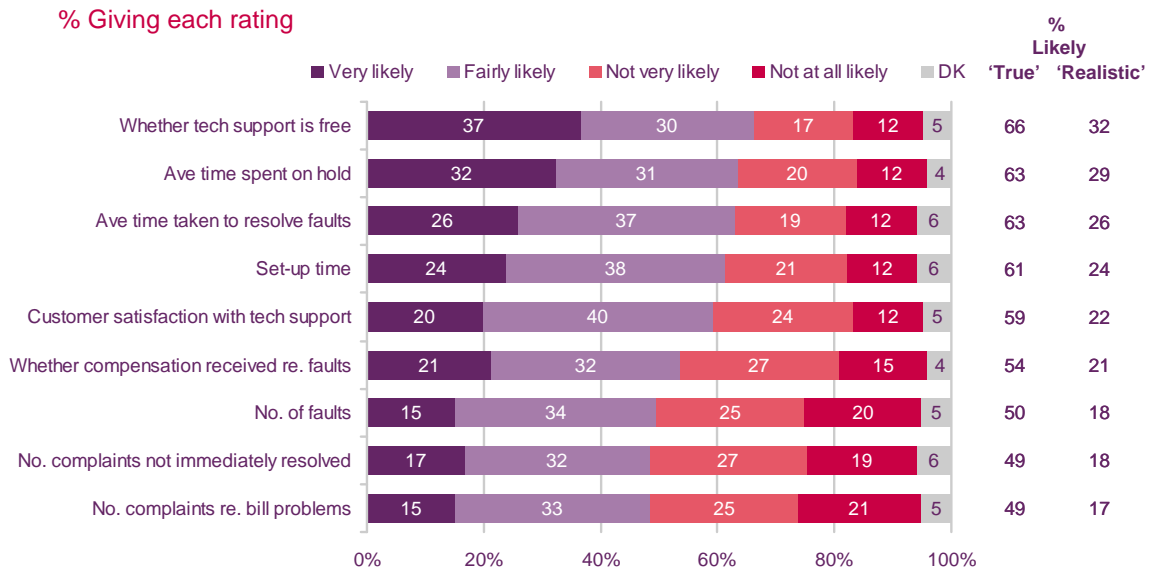
The main element of customer service that decision-makers in this sector were most interested in comparing providers on was the average time they would spend on hold when trying to get through to a customer service representative.

Figure 49 also shows the likely uptake of information based on a more conservative scenario, which assumes that 70% of those saying they were “very likely” to use the information and 20% of those saying “fairly likely” would actually do so in reality. On this basis overall likelihood to use Quality of Service information falls by at least half, to between 17% and 32%, with more than a quarter of Pay TV decision-makers wanting to compare providers on the following factors:

- ▶ whether technical support is free (32%)
- ▶ average time spent on hold (29%)
- ▶ average time taken to resolve faults (26%)

Interest in other types of Quality of Service information drops to a quarter or less.

Figure 49: Likelihood to use information to compare Pay TV provider performance

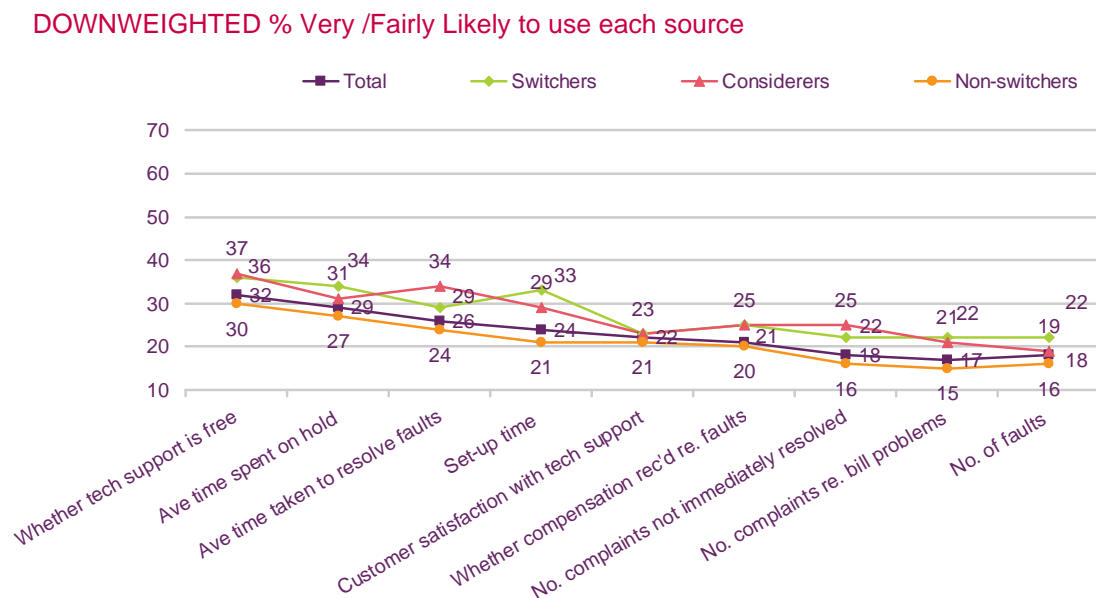


Source: Quality of Service Research – Q5
 Base: All joint/sole decision makers for Pay-TV (n=530)

Looking at overall likelihood to use Quality of Service information on the basis of stated intention, both Considerers and Switchers demonstrated higher than average levels of interest, with likelihood to use ranging from 55% to 80% and 53% to 74% respectively.

Figure 50 looks at the conservative estimates for likely uptake across the three key participation segments. Again, both Considerers and Switchers demonstrated higher levels of interest in Quality of Service information across all the areas on which that information might be available, with likelihood to use ranging from 19% to 37%, and 22% to 36% respectively. Non-Switchers were the least interested, with likelihood to use ranging from 15% to 30%.

Figure 50: Likelihood to use information to compare Pay TV provider performance – by participation

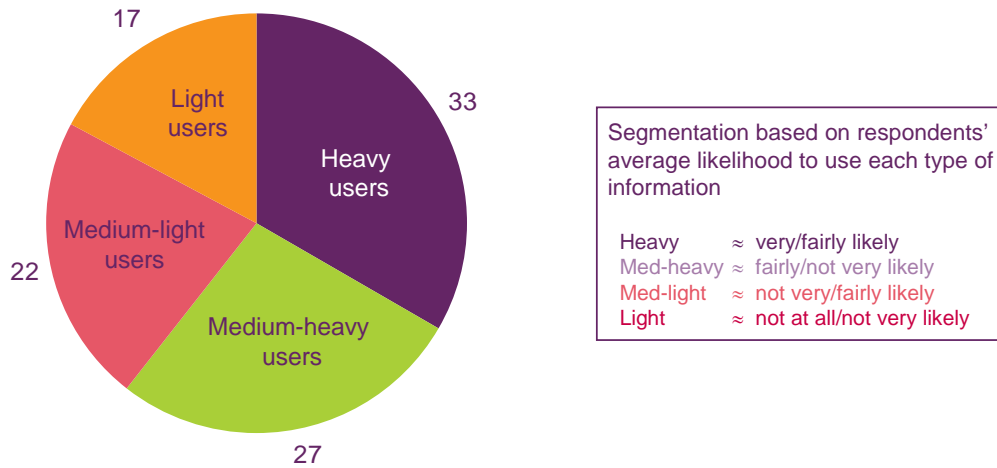


Source: Quality of Service Research – Q5
 Base: All joint/sole decision makers for each technology (n=530/91/69/366)

The distribution of decision-makers in the Pay TV sector based on the four information usage segments is shown in Figure 51 below.

Figure 51: Profile of Pay TV sector by four usage segments

% in each segment



Source: Quality of Service Research – Q5
 Base: Joint/sole decision makers for Pay-TV (n=530)

Figure 52 reports participation levels among each of these segments in the Pay TV sector. The data shows that Heavy Users were significantly more likely to have already re-entered the Pay TV sector or be open to doing so: 22% of Heavy Users were Switchers (experienced or actively looking) compared to 11% of Light Users – and 16% were Considerers compared to 7% of Light Users. This is simply another way to establish that interest in Quality of Service information is highest amongst the more engaged segments of the sector.

Figure 52: Levels of participation among four usage segments

% of each segment who have switched or might switch in the future

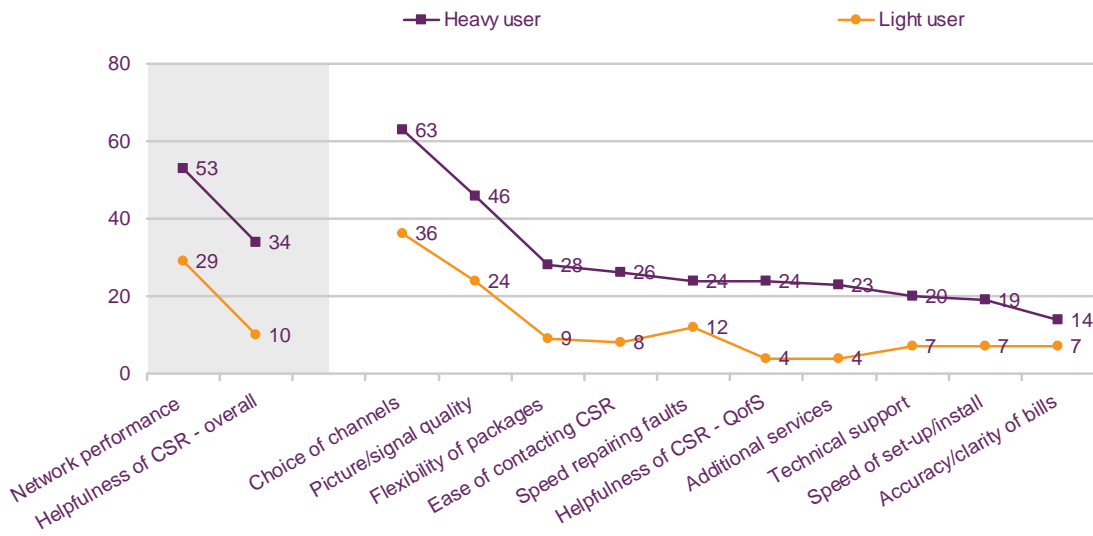


Source: Quality of Service Research – Q8/9 analysed by Q5 segments
 Base: All joint/sole decision makers for Pay-TV in each segment (n=175/145/119/91)

In this sector, Heavy Users again place a higher importance on Quality of Service. As shown in Figure 53, at an overall level, Heavy Users were significantly more likely than Light Users to regard both network performance and customer service as important aspects of their Pay TV provider: Heavy Users were 24% more likely than Light Users to rate each of these aspects as important. It follows that Heavy Users were more interested in comparing their Pay TV provider on all the elements constituting Quality of Service at a detailed level. The gap between Heavy and Light Users was most marked with regard to choice of channels and picture/signal quality, as is consistent with the priority placed on network performance at an overall level.

Figure 53: All factors important when choosing / comparing Pay TV providers – by usage segment

% of each segment mentioning factors as being important

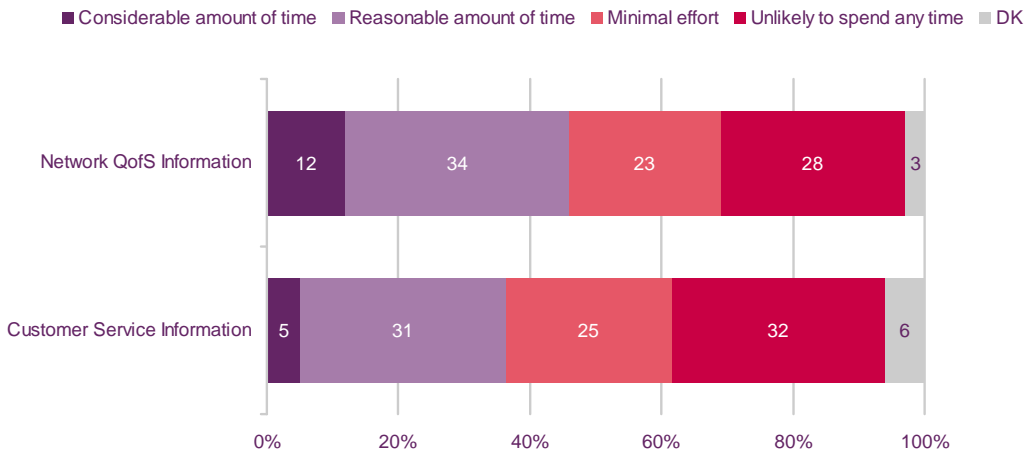


Source: Quality of Service Research – Q3a/b, Q4 analysed by Q5 segments
 Base: All joint/sole decision makers for Pay-TV in each segment (n=175/145/119/91)

Figure 54 shows that almost half of all Pay TV decision-makers (46%) said they would spend at least a reasonable amount of time looking for information on network performance. Significantly fewer (36%) said they would make this degree of effort to find information on customer service. Compared to other communications sectors, consumers were less inclined to make any effort looking for information on either aspect of Quality of Service.

Figure 54: Length of time willing to spend searching for information on Pay TV providers

% Stating each

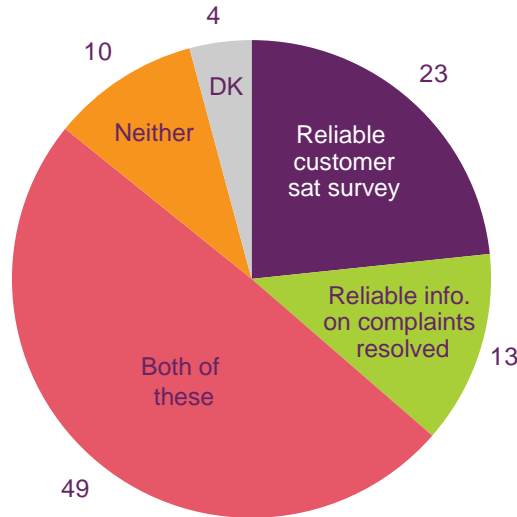


Source: Quality of Service Research – Q7
 Base: All joint/sole decision makers for Pay-TV: Sample 1 (n=226), Sample 2 (n=304)

Most consumers in this sector felt that the most valuable way to provide Quality of Service information was via a combination of subjective data (i.e. via a reliable customer satisfaction survey) as well as objective data (i.e. statistics based on actual service levels/performance), as Figure 55 below shows.

Figure 55: Most valuable type of information on Pay TV providers

% Stating each



Source: Quality of Service Research – Q6
 Base: All joint/sole decision makers for Pay-TV (n=530)

Figure 56 shows that this was consistent across the three key participation segments. However Switchers and Considerers were significantly more interested in customer satisfaction surveys than Non-Switchers (33% and 38% compared to 18% respectively).

Figure 56: Most valuable type of information on Pay TV providers – by participation

% Stating each



Source: Quality of Service Research – Q6
 Base: All joint/sole decision makers for Pat TV in each segment

Summary of findings in the Pay TV sector

When consumers were asked to think about what mattered to them in their Pay TV provider, the total cost of the service was the most important factor, closely followed by the features included in the package (i.e. what is included within the price). Network performance was the third most important factor but customer service was mentioned by very few decision-makers in this sector and ranked lower in importance as a result.

It follows that channel choice and picture/signal quality were the two most important elements of Quality of Service for decision-makers when choosing a Pay TV provider. However it is important to point out that one in four were not engaged with any aspects of Quality of Service, either having no need to compare providers in this sector or not regarding any of the factors as important in the selection process.

The stated intentions of Pay TV decision-makers to use the different types of Quality of Service tested ranged from 49% to 66%. However this dropped to between 17% and 32% based on a more conservative estimate of how many consumers will do as they intend in reality. Likelihood to use all types of information was highest amongst those who have re-entered the sector (experienced switchers and those actively looking for a new supplier) and those who are open to the idea of a new supplier.

As far as network performance was concerned, consumers were more likely to want to compare Pay TV providers on the time taken to resolve faults than the overall number of faults occurring.

The customer service aspects that consumers were most likely to want to compare providers on were whether technical support is freely available and how long the average person spends on hold waiting to speak to a customer service representative.

Most were seeking a balance of subjective information (from a reliable customer satisfaction survey) and objective information (in the form of factually based data on complaints resolved).

In the Pay TV sector, consumers were less likely to make an effort to look for Quality of Service information, although they were slightly more inclined to seek out information on network performance than customer service.

3.6 Methods for distribution

An important consideration in the provision of information into sectors where consumers already complain of being overwhelmed is how to present it in such a way that it is easy to understand and genuinely serves to clarify and facilitate decision-making, rather than confuse and hinder decision-making.

During the qualitative research, respondents were asked to react to various different formats for presenting data and the results are summarised below:

- ▶▶ Bar charts were appealing to those who like data/numbers and provided clear visual comparisons and a genuine indication of the gap between providers. However some questioned how the scores were generated.
- ▶▶ Star rating systems provided a simple visual that appealed to the less numerate based on a system that is familiar to many given its use in other sectors. However some felt it lacked differentiation and again questioned what scores they would represent and how the scores were generated.
- ▶▶ Ranked positions had no real value as they failed to provide any indication of the gap between providers.
- ▶▶ Scores that were not graphically represented could cause confusion among the less numerate.

The common requirements that consumers voiced were (a) having access to aggregate as well as detailed scores for each metric and (b) having access to the full range of scores on any given metric in order to evaluate the position of the providers being rated.

As far as distribution channel is concerned, most participants in the qualitative research recommended that the information (including cost comparisons) be made available on the internet, ideally on a single site or page to facilitate comparisons between providers. Most assumed that given Ofcom's role as regulator, any Quality of Service information for the sector would be published on Ofcom's site. However respondents highlighted that Ofcom's site would have to have a high(er) profile in order to be of any value. In other words there would need to be links to Ofcom's site from provider sites and/or from other comparison sites.

In acknowledgement of those without access to the internet, the suggestion was also made to develop and distribute information packs or leaflets via relevant retail environments - mobile phone shops for example.

Most critically, if it was at all hard to find, access or make comparisons, the likelihood of any Quality of Service information being consulted would be limited.

3.7 Comparison across sectors

Figure 57 below shows the factors that are most important in driving provider perceptions among decision-makers across the four communications services sectors. The research shows that aside from cost, the 'network performance' side of Quality of Service is consistently the more important driver of decisions than the 'customer service' side – particularly in the mobile phone and broadband internet sectors.

The figures highlighted are significantly different from data points in other sectors.

Figure 57: Factors important when thinking about provider – by sector

N.B. Excluded those who did not identify any issues as important

Total Top 3 Rankings

%	Mobile phone	Landline phone	Broadband Internet	Pay-TV
Total cost of service	65	70	66	63
Network performance	54	33	69	38
Features included	26	29	25	52
Deals/loyalty rewards	25	19	13	19
Helpfulness of customer reps	14	19	18	15
Technical support	11	11	25	12

Figure 58 shows the detailed elements of Quality of Service that matter most to consumers across the four communications services sectors – i.e. the elements on which they would most want to compare providers in the respective sectors. The research shows that in three out of the four sectors, the most important criteria for evaluation is a core aspect of service reliability (coverage, line reliability, broadband speed) – in other words, even at this detailed level, 'network performance' issues out-rank 'customer service' issues.

Even in the Pay TV sector, 'network performance' (picture/signal quality) emerges as the second most important factor, so it is not far behind.

Figure 58: QoS factors important when choosing / comparing providers – by sector

N.B. Excluded those who did not identify any issues as important

% Ranked each factor in top 3

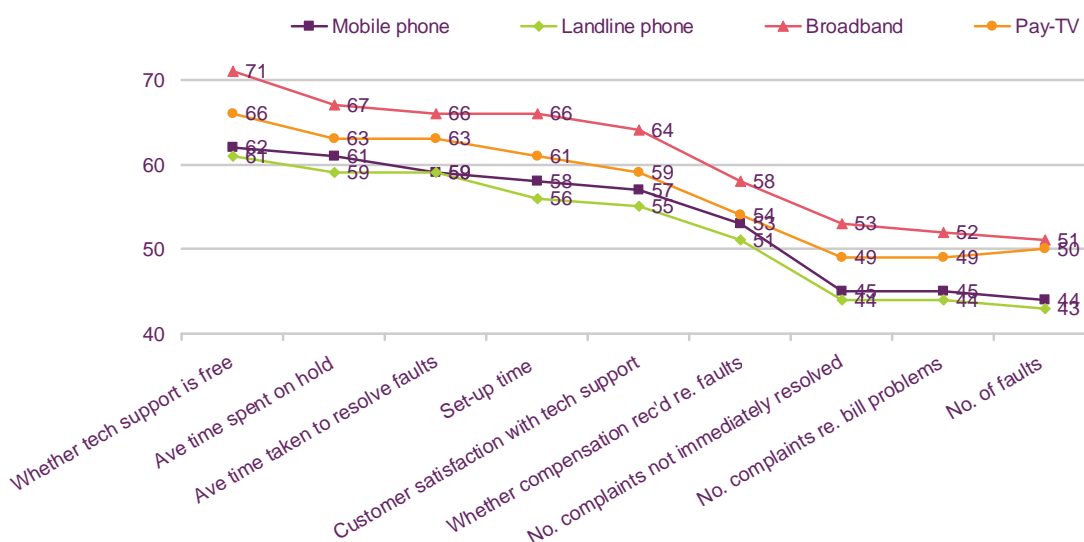
%	Mobile phone	Landline phone	Broadband Internet	Pay-TV
Most important issue				
Coverage	38			
Line reliability		35		
Broadband speed			45	
Choice of channels				50
Common factors				
Speed repairing faults		20	13	11
Ease of contacting CSR	17	16	12	12
Technical support	13	11	14	8
Helpfulness of CSR	14	12	8	9
Accuracy/clarity of bills	11	15		7
Speed of set-up/install		9	6	8

As shown in Figure 59 below, the broadband internet sector demonstrates the highest propensity to use the different types of Quality of Service information that might be made available, followed by the Pay TV sector.

Given the gap that is known to exist between stated intentions and actual behaviour, uptake is likely to fall 30-40% from these levels assuming that only 70% of those saying they were “very likely” to use the information and 20% of those saying “fairly likely” would actually do so in reality.

Figure 59: Likelihood to use information to compare provider performance – by sector

% Very /Fairly Likely to use each source



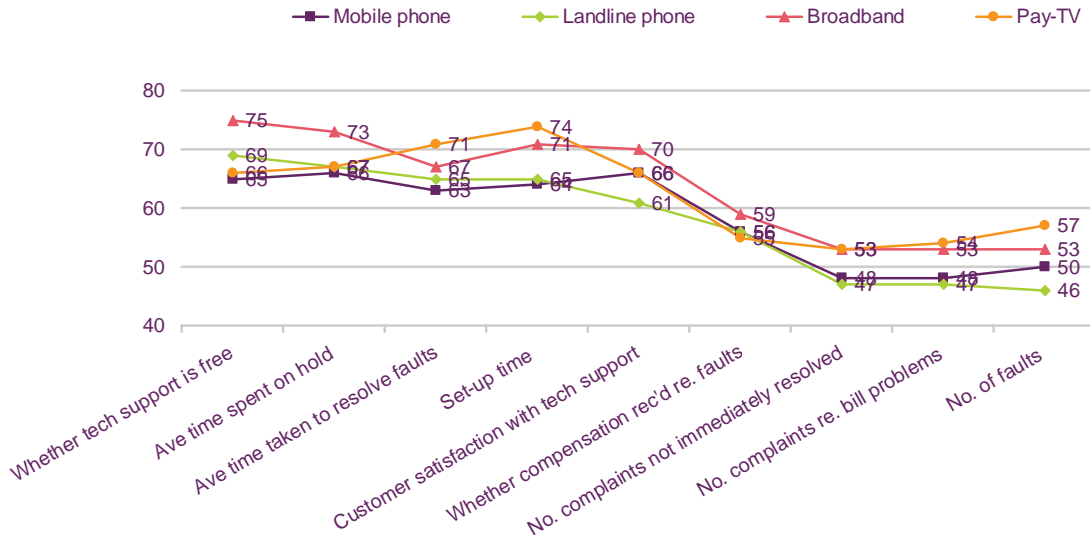
Source: Quality of Service Research – Q5
 Base: All joint/sole decision makers for each technology (n=1535/1435/894/530)

Of the three key participation segments considered in this research, likely uptake is highest among Considerers and Switchers in all sectors, while levels of interest are consistently

lower among Non-Switchers. Likelihood to use Quality of Service information, based on stated intention, is compared below for the former two segments:

Figure 60: Likelihood to use information to compare provider performance – by sector

% SWITCHERS Very / Fairly Likely to use each source

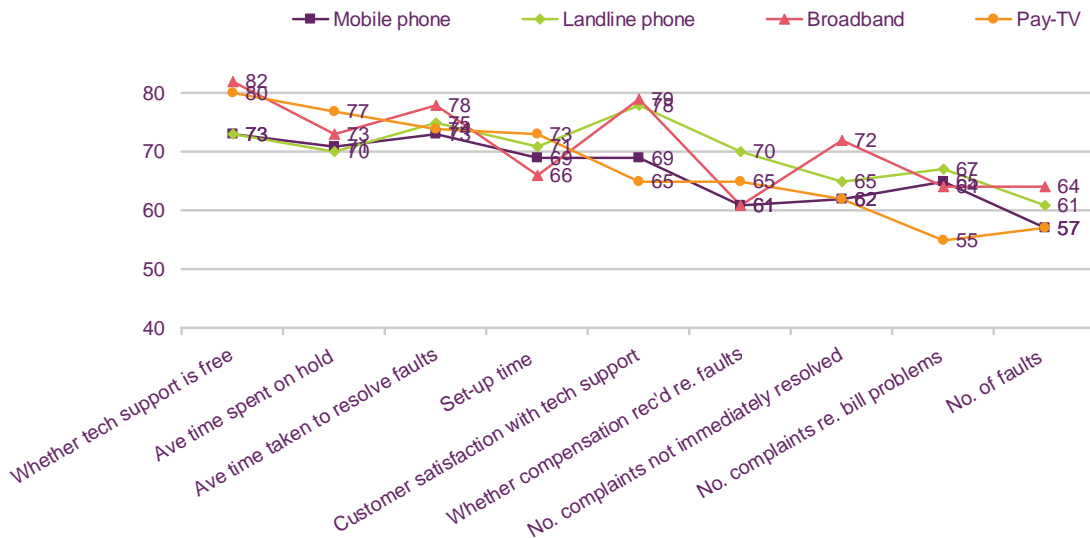


Source: Quality of Service Research – Q5

Base: All joint/sole decision makers for each technology who have switched in last 4 years/actively looking for alternative (n=476/412/315/91)

Figure 61: Likelihood to use information to compare provider performance – by sector

% CONSIDERERS Very / Fairly Likely to use each source



Source: Quality of Service Research – Q5

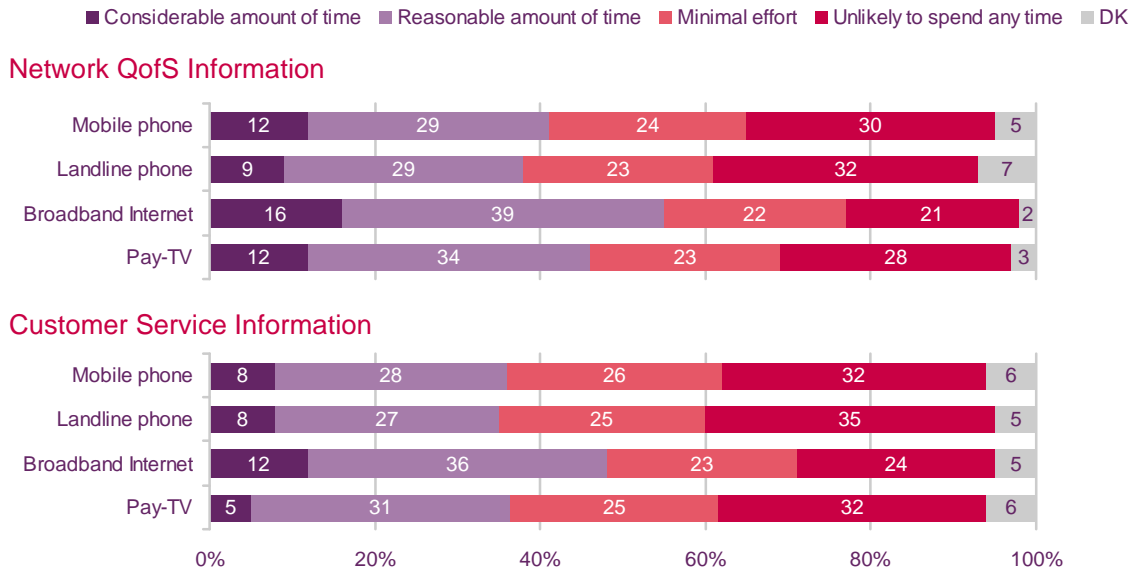
Base: All joint/sole decision makers for each technology who are open to idea of new supplier (n=113/109/88/69)

Not insignificant numbers of consumers say they are unlikely to spend any time looking for Quality of Service information on either 'network performance' or 'customer service' issues. However this varies significantly by sector as shown in Figure 62. Decision-makers in the broadband sector are most likely to make an effort on both dimensions, with more than half of all consumers saying they would spend a considerable or reasonable amount of time seeking out this information.

In the mobile phone and Pay TV sectors, decision-makers are more inclined to make a considerable effort to find information on ‘network performance’ than ‘customer service’. Those in the fixed line sector are the least inclined to make an effort on either dimension.

This reflects current levels of participation in each of these sectors.

Figure 62: Length of time willing to spend searching for information – by sector

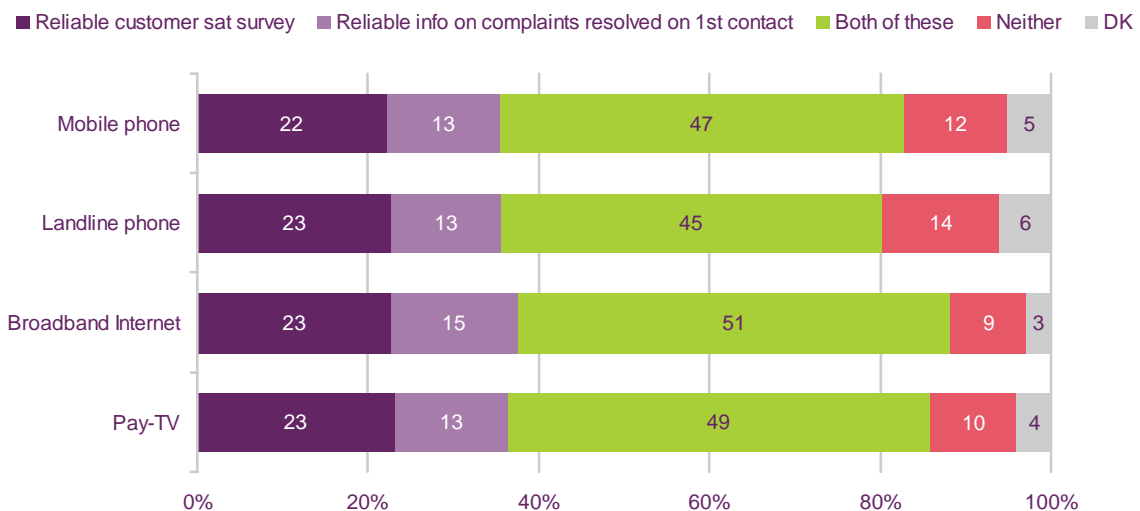


Source: Quality of Service Research – Q7
 Base: All joint/sole decision makers for each technology: Sample 1 (n=744/697/424/226), Sample 2 (n=791/738/470/304)

Finally, Figure 63 shows that when given the choice, consumers in all sectors state a preference for having both objective and subjective sources of Quality of Service information on which to compare providers (assuming that customer satisfaction data is based on independent research from a trusted source, rather than being the provider’s own research).

Figure 63: Most valuable type of information – by sector

% Stating each



Source: Quality of Service Research – Q6
 Base: All joint/sole decision makers for each technology (n=1535/1435/894/530)

Annex 1

Quantitative questionnaire

SHOWCARD

Q1 Which of the following do you have for personal use at home?

INTERVIEWER NOTE: BY PAY TV WE MEAN TV SERVICES FOR WHICH YOU PAY A SUBSCRIPTION TO A SUPPLIER SUCH AS VIRGIN, SKY OR BT VISION

Landline telephone	1
Mobile phone	2
Broadband Internet	3
Pay-TV	4
None of the above	5 → CLOSE

Q2a And which of them are you either the sole or joint decision maker for? By sole or joint decision maker, we mean that you would be involved in any decision to review or switch suppliers.

SHOW ONLY THOSE SERVICES CODED AT Q1

Landline telephone	1
Mobile phone	2
Broadband Internet	3
Pay-TV	4
None of the above	5 → CLOSE

ONLY ASK Q2b IF CODE 2 AT Q2a

Q2b For your mobile phone are you on pay as you go or a contract service?

Pay as you go	1
Contract	2
Don't know	3

ONLY ASK Q2b IF CODE 2 AT Q2a

Q2c And is your mobile a 3G mobile, in other words are you able to send and receive data at high speeds and make and receive video calls?

- Yes
- No
- Don't know

FROM NOW ON, ASK RESPONDENTS TO RATE EACH SERVICE THEY ARE DECISION MAKERS FOR at Q2a

ASK Q2d FOR ALL TECHNOLOGIES RESPONDENT IS DECISION MAKER FOR AT Q2a BEFORE MOVING TO Q3a

Provision of quality of service information

Q2d. How satisfied are you with the overall service provided by your [landline/mobile/broadband/Pay TV - INSERT ALL MENTIONED AT Q2a - ROTATE ORDER OF] supplier? Would you say you are...

READ OUT

Very satisfied	1
Fairly satisfied	2
Neither satisfied nor dissatisfied	3
Fairly dissatisfied	4
Very dissatisfied	5
None of the above	6

ASK RESPONDENTS Q3, Q4 and Q5 FOR EACH TECHNOLOGY MENTIONED AT Q2a, THEN REPEAT FOR THE NEXT TECHNOLOGY

Q3a. What factors are important to you when thinking about your _____ (INSERT TECHNOLOGY AS LANDLINE/MOBILE/BROADBAND/PAY TV ROTATE ORDER) provider? **DO NOT READ OUT. CODE ALL MENTIONED BELOW**

SHOWCARD (LIST)

Q3b Besides the things you've just mentioned, please could you tell me if any of the following are important to you?

READ OUT ALL NOT MENTIONED AT Q3a (EXCEPT QUALITY OF SERVICE AND CUSTOMER SERVICE). CODE ALL MENTIONED BELOW

Total cost of service	1
The deals & loyalty rewards they are willing to offer you (e.g. offers, discounts and upgrades)	2
The features included within the package i.e. what is included for the price (e.g. [VARIES DEPENDING ON SERVICE BEING DISCUSSED: MOBILE handsets FIXED friends and family deals BROADBAND free hardware such as a router PAY TV what channels are available)	3
The network performance (i.e. quality, coverage and reliability of the actual signal/speed and quality of connection)	4
Helpfulness of customer representatives (e.g. courtesy, keeping promises) [not including technical support]	5
Technical support	6
DO NOT READ AT Q3B: Quality of service (unspecified)	7
DO NOT READ AT Q3B: Customer service (unspecified)	8
Other (specify)	9
(Q3b ONLY BUT DO NOT READ OUT: None of these are important)	0

Q3c Next, please could you rank the factors on this list from most important to least important in terms of how much they matter to you in a...._____ (INSERT TECHNOLOGY AS LANDLINE/MOBILE/BROADBAND/PAY TV ROTATE ORDER) provider.

ONLY SHOW FACTORS MENTIONED AT Q3a OR Q3b. TURN COMPUTER TO RESPONDENT AND ASK THEM TO SELF-COMPLETE.

Which of these factors is most important to you _____ REPEAT UNTIL ALL FACTORS HAVE BEEN SELECTED.

Total cost of service

The deals & loyalty rewards they are willing to offer you (i.e. offers, discounts and upgrades)

The features included within the package i.e. what is included for the price (e.g. [VARIES DEPENDING ON SERVICE BEING DISCUSSED:

MOBILE	handsets
FIXED	friends and family deals
BROADBAND	free hardware such as a router
PAY TV	what channels are available)

The network performance (i.e. quality, coverage and reliability of the actual signal/speed and quality of connection)

Helpfulness of customer representatives (i.e. courtesy, keeping promises etc. but not including technical support)

Technical support

Other (PLEASE INSERT ANY OTHERS MENTIONED AT Q3a - EXCEPT FOR "QUALITY OF SERVICE" OR "CUSTOMER SERVICE" - AND ANY OTHERS MENTIONED AT 3b INTO THE RANKING AT Q3c)

RANDOMISE ORDER OF THE MARKETS IN SECTION 4

LANDLINE

Q4a Looking specifically at the quality of service factors that would be important to you when comparing landline providers, please indicate which factors, if any, on this list are important to you when choosing a supplier for this service....

IF RESPONDENT SAYS THEY HAVE NO NEED TO COMPARE BETWEEN PROVIDERS, CODE AS "NONE OF THESE ARE IMPORTANT"

MULTICODE

RANDOMISE ORDER

Line reliability (i.e. the line is free of faults)

Call quality

Speed of repairing faults

The technical support (i.e. ability & expertise of the staff)

Speed of set-up and installation

Ease of getting through to speak to customer service representative

Provision of quality of service information

Helpfulness of customer representatives (i.e. courtesy, keeping promises etc.)

The accuracy and ease of understanding the bills

Other (specify)

None of these are important = SKIP Q4b AND GO TO Q5 (unless they have other services then will need to answer relevant sections of 4)

Q4b. Please rank the factors on this list from most important to least important in terms of how much they matter to you when comparing landline providers.

ONLY SHOW FACTORS MENTIONED AT Q4a. TURN COMPUTER TO RESPONDENT AND ASK THEM TO SELF-COMPLETE.

IF RESPONDENT SAYS THEY HAVE NO NEED TO COMPARE PROVIDERS ASK THEM TO THINK ABOUT WHAT MIGHT BE IMPORTANT TO THEM IF THEY DID

Which of these factors is most important to you _____ REPEAT UNTIL ALL FACTORS HAVE BEEN SELECTED.

RANDOMISE ORDER.

Line reliability (i.e. the line is free of faults)

Call quality

Speed of repairing faults

The technical support (i.e. ability & expertise of the staff)

Speed of set-up and installation

Ease of getting through to speak to customer service representative

Helpfulness of customer representatives (i.e. courtesy, keeping promises)

The accuracy and ease of understanding the bills

Other (PLEASE INSERT ANY OTHERS MENTIONED AT 4a)

BROADBAND

Q4c Looking specifically at the quality of service factors that would be important to you when comparing broadband providers, please indicate which factors, if any, on this list are important to you when choosing a supplier for this service...

IF RESPONDENT SAYS THEY HAVE NO NEED TO COMPARE BETWEEN PROVIDERS, CODE AS "NONE OF THESE ARE IMPORTANT"

MULTICODE

RANDOMISE ORDER

Broadband speeds

Consistent broadband speeds (same speeds even at peak hours)

Reliability of connection e.g. frequency faults, downtime etc

Ease of set up and installation

The technical support (i.e. ability & expertise of the staff)

Speed of repairing faults

Speed of installation (how quickly the ISP supplies the service to your home)

Ease of getting through to speak to customer service representative

Helpfulness of customer representatives (i.e. courtesy, keeping promises)

Whether there are any hidden charges (i.e. unexpected costs for technical help lines etc)

Other (specify)

None of these are important = SKIP Q4d AND GO TO Q5 (unless they have other services then will need to answer relevant sections of 4)

Q4d Please rank the factors on this list from most important to least important in terms of how much they matter to you when comparing broadband providers.

ONLY SHOW FACTORS MENTIONED AT Q4c. TURN COMPUTER TO RESPONDENT AND ASK THEM TO SELF-COMPLETE.

IF RESPONDENT SAYS THEY HAVE NO NEED TO COMPARE PROVIDERS ASK THEM TO THINK ABOUT WHAT MIGHT BE IMPORTANT TO THEM IF THEY DID

Which of these factors is most important to you _____ REPEAT UNTIL ALL FACTORS HAVE BEEN SELECTED.

RANDOMISE ORDER.

Broadband speeds

Consistent broadband speeds (same speeds even at peak hours)

Reliability of connection e.g. frequency faults, downtime etc

Provision of quality of service information

Ease of set up and installation

The technical support (i.e. ability & expertise of the staff)

Speed of repairing faults

Speed of installation (i.e. how quickly the ISP supplies the service to your home)

Ease of getting through to speak to customer service representative

Helpfulness of customer representatives (i.e. courtesy, keeping promises)

Whether there are any hidden charges (i.e. unexpected costs for technical help lines etc)

Other (PLEASE INSERT ANY OTHERS MENTIONED AT 4c)

MOBILE

Q4e Looking specifically at the quality of service factors that would be important to you when comparing *mobile* providers, please indicate which factors, if any, on this list are important to you when choosing a supplier for this service...

IF RESPONDENT SAYS THEY HAVE NO NEED TO COMPARE BETWEEN PROVIDERS, CODE AS "NONE OF THESE ARE IMPORTANT"

MULTICODE

RANDOMISE ORDER

Coverage (network availability including 3G coverage and signal strength)

The technical support (i.e. ability & expertise of the staff)

Ease of obtaining replacement handsets if there is a fault/it is lost

A clear explanation of the package (including extra costs)

Ease of getting through to speak to customer service representative

Helpfulness of customer representatives (courtesy, keeping promises)

The accuracy and ease of understanding the bills

Other (specify)

None of these are important = SKIP Q4f AND GO TO Q5 (unless they have other services then will need to answer relevant sections of 4)

Q4f Please rank the factors on this list from most important to least important in terms of how much they matter to you when comparing mobile providers.

ONLY SHOW FACTORS MENTIONED AT Q4e. TURN COMPUTER TO RESPONDENT AND ASK THEM TO SELF-COMPLETE.

IF RESPONDENT SAYS THEY HAVE NO NEED TO COMPARE PROVIDERS ASK THEM TO THINK ABOUT WHAT MIGHT BE IMPORTANT TO THEM IF THEY DID

Which of these factors is most important to you _____ REPEAT UNTIL ALL FACTORS HAVE BEEN SELECTED.

RANDOMISE ORDER.

Coverage (network availability including 3G coverage and signal strength)

The technical support (i.e. ability & expertise of the staff)

Ease of obtaining replacement handsets if there is a fault/it is lost

A clear explanation of the package (i.e. including extra costs)

Ease of getting through to speak to customer service representative

Helpfulness of customer representatives (i.e. courtesy, keeping promises)

The accuracy and ease of understanding the bills

Other (PLEASE INSERT ANY OTHERS MENTIONED AT 4e)

PAY TV

Q4g Looking specifically at the quality of service factors that would be important to you when comparing Pay TV providers, please indicate which factors, if any, on this list are important to you when choosing a supplier for this service...

IF RESPONDENT SAYS THEY HAVE NO NEED TO COMPARE BETWEEN PROVIDERS, CODE AS "NONE OF THESE ARE IMPORTANT"

MULTICODE

RANDOMISE ORDER

The choice of channels

Flexibility of the packages (i.e. subscribing to / unsubscribing from certain channels)

Speed of set-up and installation

Availability of additional services (e.g. catch up TV)

The picture quality/signal availability

The technical support (i.e. ability & expertise of the staff)

Ease of getting through to speak to customer service representative

Helpfulness of customer representatives (i.e. courtesy, keeping promises etc.)

Speed of repairing and handling of faults (i.e. including receiving replacement boxes)

Provision of quality of service information

The accuracy and ease of understanding the bills

Other (specify)

None of these are important = SKIP Q4h AND GO TO Q5

Q4h Please rank the factors on this list from most important to least important in terms of how much they matter to you when comparing Pay TV providers.

ONLY SHOW FACTORS MENTIONED AT Q4g. TURN COMPUTER TO RESPONDENT AND ASK THEM TO SELF-COMPLETE.

IF RESPONDENT SAYS THEY HAVE NO NEED TO COMPARE PROVIDERS ASK THEM TO THINK ABOUT WHAT MIGHT BE IMPORTANT TO THEM IF THEY DID

Which of these factors is most important to you _____ REPEAT UNTIL ALL FACTORS HAVE BEEN SELECTED.

RANDOMISE ORDER.

The choice of channels

Flexibility of the packages (e.g. subscribing to / unsubscribing from certain channels)

Speed of set-up and installation

Availability of additional services (e.g. catch up TV)

The picture quality/signal availability

The technical support (i.e. ability & expertise of the staff)

Ease of getting through to speak to customer service representative

Helpfulness of customer representatives (courtesy, keeping promises)

Speed of repairing and handling of faults (including receiving replacement boxes)

The accuracy and ease of understanding the bills

Other (PLEASE INSERT ANY OTHERS MENTIONED AT 4g)

SHOWCARD (SCALE)

Q5 I am now going to read out some types of information that you might use to compare the performance of different providers. Please assume that this information was available on each provider from a reliable source. Please could you tell me how likely or unlikely you would be to use each type of information to compare performance if you were thinking of switching providers or wanted to assess whether there are other providers who would be more suitable for your needs, using the scale on this card.

- Very likely
- Fairly likely
- Not very likely
- Not at all likely to use the comparison data

So, starting with (READ OUT FIRST FACTOR), would you be...(READ OUT SCALE)?

REPEAT FOR EACH FACTOR. RANDOMISE ORDER. SINGLE CODE PER FACTOR.

	Very Likely	Fairly Likely	Not very Likely	Not at all likely	DK
The time it takes for the service to be set-up/ installed in working days	1	2	3	4	5
The total number of complaints received per 1000 customers that were not resolved on the initial contact	1	2	3	4	5
The total number of complaints per 1000 about problems with bills	1	2	3	4	5
The total number of faults per 1000 customers	1	2	3	4	5
The average time taken to resolve faults in hours	1	2	3	4	5
The average time you were on hold before speaking to someone when you call	1	2	3	4	5
Whether you have to pay for technical help/support.....	1	2	3	4	5
Whether you receive compensation if your service is unavailable/ connections go down	1	2	3	4	5
Customer satisfaction data on the quality of the technical support	1	2	3	4	5
MOBILE PHONE CUSTOMERS ONLY					
The network coverage of mobile phone providers	1	2	3	4	5
3G coverage (coverage of suppliers offering 3G services such as video calling and high speed data transfer)	1	2	3	4	5
BROADBAND CUSTOMERS ONLY					
Connection speeds for broadband providers	1	2	3	4	5

Provision of quality of service information

Q6 Which, if either, of the following types of information would be most valuable to you or are they both equally valuable.....?
READ OUT. SINGLE CODE

A reliable customer satisfaction survey (for example, a customer satisfaction survey commissioned by Ofcom showing the proportion of customers satisfied with their providers' complaint handling)

1

A reliable source providing information total number of complaints resolved on the initial contact

2

Both equally valuable

3

(DO NOT READ OUT) Neither

4

(DO NOT READ OUT) Don't know

5

SHOWCARD (ANSWERS)

Q7 Which of the following statements best describes how long you would spend searching for

HALF RESPONDENTS TO BE READ (a)

HALF RESPONDENTS TO BE READ (b).

(a) information about customer service (e.g. complaint handling, helpfulness of customer representatives)

(b) information about network quality of service (e.g. reception, faults)

for a _____ (INSERT TECHNOLOGY AS LANDLINE/MOBILE/BROADBAND/PAY TV ROTATE ORDER) provider?

REPEAT FOR EACH TECHNOLOGY CODED AT Q2a. SINGLE CODE FOR EACH

I would spend a considerable amount of time as it is important to me to ensure I make the right choice

1

I would spend a reasonable amount of time, provided it did not take too long

2

I would use the information if it was readily available and I could find it with minimal effort spent

3

I would be unlikely to spend any time as I would base my choice on other things

4

(DO NOT READ OUT) Don't know

5

SHOWCARD (SERVICES)

Q8 In the last 4 years have you switched suppliers or asked your current supplier to match a better tariff or package deal for any of the services you use? IF YES Which telecoms services have you switched or negotiated?

ONLY SHOW SERVICES CODED AT Q2a. MULTICODE

Landline telephone..... 1

Mobile phone 2

Broadband Internet 3

Pay-TV..... 4

None / No..... 5

ASK Q9 FOR EACH TECHNOLOGY CODED AT Q2a

Q9 For each of these services going forward would you say that you are:

- 1) Actively looking for a new supplier at the moment
- 2) Open to the idea of a new supplier
- 3) Not interested in a new supplier

SINGLE CODE PER SERVICE. READ OUT SERVICES. DK ALLOWED.

	Active	Open	No interest
Landline telephone	1	1	1
Mobile phone	2	2	2
Broadband Internet	3	3	3
Pay-TV.....	4	4	4