

Triple play switching, online research

Main findings

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- Switching motivations
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Main findings

Switchers

- Activities undertaken when considering/switching
- Difficulties experienced
- Experience of loss of service
- Experience of double billing/contract overlap
- Notice periods, early termination and other charges
- Provider contact
- Attitude to switching/ease of switching/satisfaction

Decided not to switch (DNT)

- Activities undertaken when considering switching
- Factors impacting decision not to switch
- Provider contact
- Attitude to switching/ease of switching/satisfaction

Non-switcher/non-active considerer (NS/NAC)

- Factors impacting decision not to switch/consider switching
- Attitude to switching/ease of switching

Annex

Profile of key sample groups





Research objectives and methodology



Background to research

- Ofcom's statutory duties under the Communications Act 2003 are:
- to further the interests of citizens in relation to communications matters;
- and to further the interests of consumers in relevant markets, where appropriate by promoting competition

Ofcom has a statutory duty to further the interests of consumers

Consumers must be able to switch between providers

- •To benefit from competition, they must be able to switch between products and services without undue effort, disruption and anxiety
- Research indicates that although consumers do not spontaneously recall difficulties switching, when prompted half in each market say they have

- Quantitative and qualitative research was commissioned
- Research assessed the consumer experience when switching one or more of fixed line telephony, fixed line broadband and pay TV

Research has been commissioned to understand switching



Research method



Data collection



- The main survey was conducted among an online panel sample
- A short face to face survey was also carried out to obtain profile information of the sample key groups, for weighting purposes (see weighting)
- The main study was conducted online which provided an effective and efficient means to reach the audience Ofcom wished to consult
- Fieldwork took place from 22nd
 October to 16th November 2015
- The overall sample size is 2,529 interviews

Sample



- Quotas were set in order to target a minimum number of interviews per sample group cell for the purposes of analysis
- Additionally the fallout of current/previous Virgin customers among the CPS sample; and the fallout of Virgin, Openreach and Sky and pay TV standalone, triple play and dual play customers among the Non-switching samples was monitored throughout to ensure there were no heavy skews
- The sample was divided into different groups in terms of their recent switching behaviour, services switched and their current and previous provider/s
- (More on the composition of these groups can be found on subsequent slides)

Weighting



- Online samples can sometimes be biased towards particular types of individuals
- The profile of respondents was therefore compared to data collected from a nationally representative face to face omnibus survey
- The Not switched/ Not considered sample group was found to diverge from the face to face sample on key demographic and attitudinal measures and was therefore weighted to match the face to face profile on these

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Statistical differences



Information on how to read the statistical differences



Higher than sample group of that colour



Lower than sample group of that colour

NB: significance testing at 95% level

* Denotes low base and findings should be treated as indicative only = 50 to 100

Sample structure – overall groups





Definition:

Switched a triple play, dual play or standalone pay TV package in the past 2 years*

Sample size:

N=1132

For subgroups please see following chart





Definition:

Currently have a triple play, dual play or standalone pay TV package and considered and actively started looking at changing provider in the last 12 months, but **decided not to**

Sample size:

N=699

Split:

Accepted a deal 466

Did not accept a deal: 233

NS/NAC Not switched/ Not actively considered

Definition:

Currently have a triple play, dual play or standalone pay TV package and considered changing provider in the last 12 months, but did not start looking and decided not to, or did not consider changing in the last 12 months

Sample size:

N=698



Accepted a deal: 339 Did not accept a deal: 359

^{*}Switchers were excluded if when they switched they had moved home at the same time; were migrated from Virgin Media National to TalkTalk; or if they had to get a MAC in order to switch broadband

Switching subgroups



Openreach switchers (ORS) 40% of switchers n=451

Switched a triple play or dual play package to and from a provider on the Openreach network (includes switching to/from Sky Dual and from

Cross **Platform Switchers** (CPS) 60% of

Switched to or from a Virgin triple play or dual play package; or from Sky Triple to Openreach; or to/from Virgin/Sky standalone pay TV

Switched a triple play, dual play or standalone pay TV package in the past 2 years*

Openreach to Sky Triple**)

Openreach switchers (ORS) no cancel - 27% of switchers (68% of ORS)

Subsets of ORS

Openreach switchers (ORS) with cancel - 13% of switchers (32% of ORS)

Cancelled with previous provider (E3 or F5 to cancel)

^{*}Respondents were excluded if they switched at the same time as moving home; were migrated from Virgin Media National to TalkTalk; or if they had to get a MAC in order to switch broadband ** While a switch to Sky triple would include a cross platform switch, we would expect consumers to follow a gaining provider led process, which is more aligned with an ORS hence these types of switch have been analysed within ORS.

Definition of 'decided not to switch' and 'not considered switching'



To qualify for interview as a 'decided not to' respondent had to fulfil the following criteria:

- Currently have a triple play, dual play or standalone pay TV package
- Have considered and actively started looking at changing provider in the last 12 months, but decided not to

To qualify for interview as a 'not switched/ not actively considered' respondent they had to fulfil the following criteria:

- Currently have a triple play, dual play or standalone pay TV package
- Have considered changing provider in the last 12 months, but did not start looking and decided not to, or did not consider changing in the last 12 months

DNT total N=699

All who decided not to switch

NS/NAC total

N=698

All NS/NAC 'not switched/ not actively considered'

Sub-groups of overall samples

DNT – who accepted a deal

67% N=466 Decided not to switch who said a major or minor factor in not switching was that they negotiated/ accepted a deal with their current provider

NS/NAC - Accepted

49% N=339 NS/NAC who said a major or minor factor in not switching was that they negotiated/ accepted a deal with their current provider

DNT – who did not accept a deal

33% N=233 All who decided not to switch who DID NOT say that a major or minor factor in not switching was that they negotiated/ accepted a deal with their current provider

NS/NAC -Did not accept deal

51% N=359 All NS/NAC who DID NOT say that a major or minor factor in not switching was that they negotiated/ accepted a deal with their current provider

Research covered the following areas:



Switchers

- Switching journey
- Activities undertaken
- Difficulties experienced
- •Follow on questions & verbatims
- •Period of Notice, early termination charges (ETC)
- Loss of service
- Incidence of overlapping contracts
- Previous provider contact
- Ease and expectations
- Satisfaction and recommendation

DNT

Decided Not To

- Switching journey
- Activities undertaken
- · Factors in not switching
- Follow on questions & verbatim
- Negotiating deal
- Previous provider contact
- Perceived ease
- Satisfaction

NS/NAC

Non switcher/Non-Active Considerers

- Reasons for not considering switching
- Factors in not switching/considering
- •Follow on questions & verbatim
- Negotiating deal
- Perceived ease
- Satisfaction

Questionnaire structure around 'difficulties'



Activities undertaken

 What activities respondents had undertaken whilst switching

Whether difficulties were experienced with activities undertaken

- •List of potential difficulties shown of activities respondent indicated they had undertaken
- Plus other additional activities that were assumed to be undertaken by all, e.g. contacting new provider

Whether difficulties experienced were 'major' or 'minor'

- •Those giving more than one 'major' difficulty were additionally asked what their 'main' difficulty was.
- 78% of switchers citing a 'major difficulty' stated which of these was the 'main difficulty'

- These questions then generated a list of 'major', 'minor' and the 'main' difficulty (where applicable) that respondents experienced when switching their service/s.
- The following charts show the results for all switchers and the key switching groups (i.e. ORS and CPS see slide 8)
- Additionally types of difficulty relating to the 'process of switching' have been grouped together to understand whether any difficulties being experienced are part of the process, or whether they are more general

NB: Only those respondents who noted a major difficulty/factor were asked which of these was the main difficulty/factor...and respondents were able to state 'no main'

NB: Analysis of difficulties among the NS/NAC group is focussed on 'main' only. We consider a conservative approach to analysis is appropriate for these respondents as their lack of engagement in the market means they are unlikely to have responded on an informed basis.



Contextual findings



What prompted switching/thinking about switching:

	Switched	DNT total	DNT who accepted a deal	DNT who did not accept a deal
Wanted to reduce the cost of services	42%	48%	47%	51%
Found out about a better deal/price with another provider	36%	16%	16%	18%
Previous/current provider increased cost of services	27%	30%	27%	35%
Poor customer service with previous provider	27%	11%	9%	15%
Wanted faster/unlimited broadband services	22%	17%	14%	21%
Technical issues with my previous service	22%	11%	10%	15%
My contract/deal came to an end	18%	20%	24%	10%
I always regularly review what I sign up to, to check that I have the best deal/product	11%	16%	18%	13%
Wanted the convenience of getting all services from one provider	10%	8%	8%	10%
Wanted additional content or channels	9%	6%	6%	6%
Friends and family mentioned a deal	8%	8%	8%	8%
Wanted specific content or channels not available with my previous service (e.g. exclusive sport or movie channels)	7%	3%	3%	4%

Listed mentions of 5% or more of Switched

QC5a. What made you first think about switching your services. Why did you first decide to review your arrangements? Base: All switched in last 24m (1132), DNT total (699), DNT who accepted a deal (466), DNT who didn't accepted a deal (233)



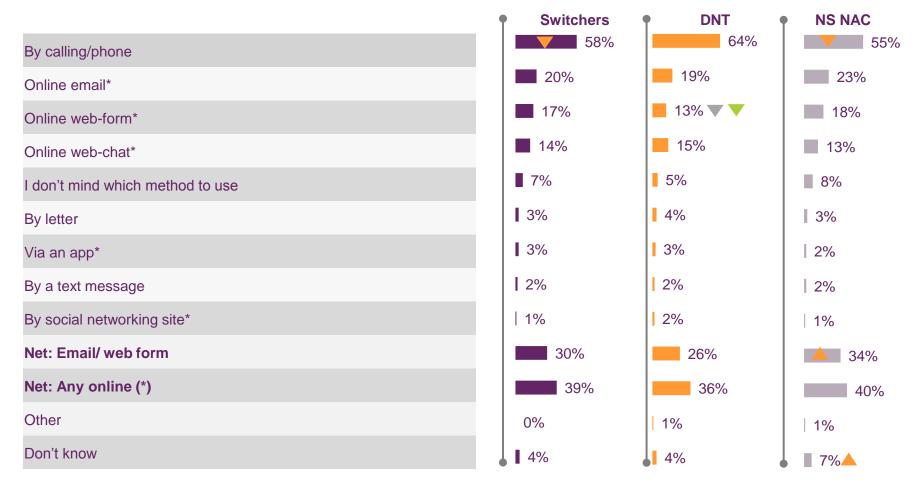
How found out what needed to do to switch

	Switched	DNT
Spoke to new provider	45%	15%
Looked online at new provider's website	37%	32%
Looked online at comparison website/s	19%	27%
Looked online at previous provider's website	14%	28%
Spoke to previous provider	13%	21%
Knew from previous experience switching the same services	12%	10%
Asked friends/family	12%	12%
Knew from previous experience switching other communications services	10%	8%
Looked online at consumer advice website/s	8%	11%
Knew from previous experience switching other non-communications services	8%	8%

QE1 How did you find out what you needed to do in order to switch? Base: All switched in last 24m (1132), DNT total (699)



Preferred method of contacting to cancel a service in the future



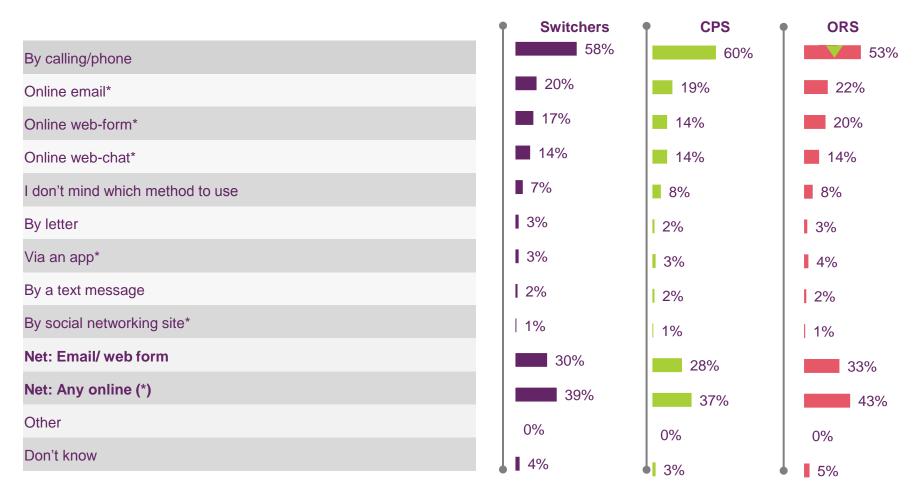
QF8 If you were to switch services in the future and needed to contact your provider to cancel their service, what would be your preferred way of contacting them?

Base: All respondents (2517), Switchers (1132), DNT (699), Non-switcher/Non-active considerer (698)

Arrow denotes sig difference
Direction of difference by up or down arrow
Colour to which group the difference applies to



Preferred method of contacting to cancel a service in the future, by process



QF8 If you were to switch services in the future and needed to contact your provider to cancel their service, what would be your preferred way of contacting them?

Base: All switched in last 24m (1132), CPS (681), ORS (451)

Arrow denotes sig difference
Direction of difference by up or down arrow
Colour to which group the difference applies to



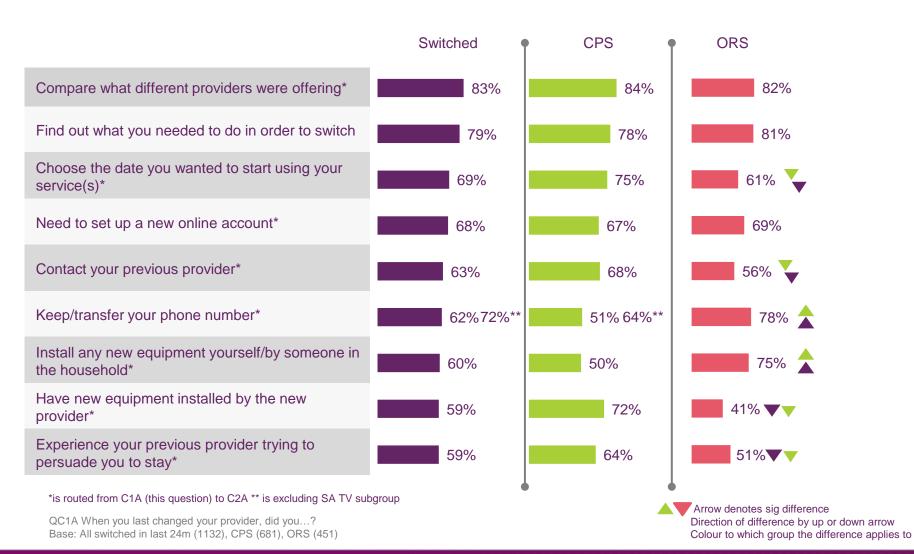
Main findings among switchers:



ACTIVITIES UNDERTAKEN



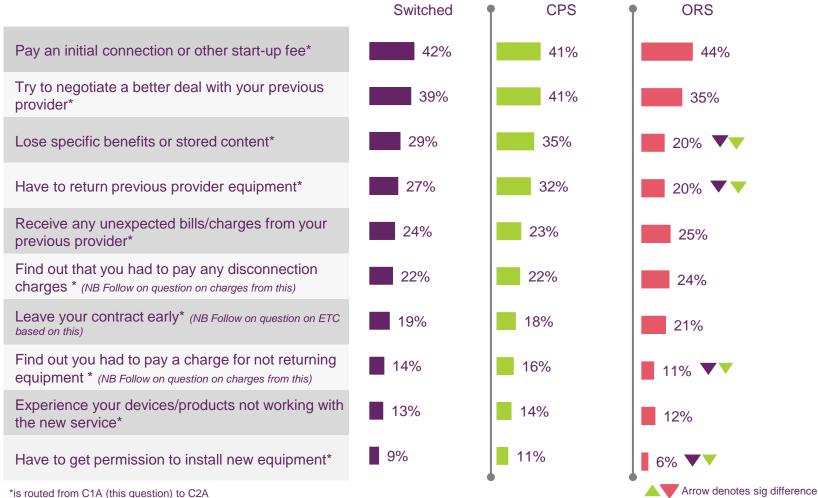
Activities undertaken by those that have switched: (1 of 2)



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Activities undertaken by those that have switched: (2 of 2)



^{*}is routed from C1A (this question) to C2A

QC1A When you last changed your provider, did you...? Base: All switched in last 24m (1132), CPS (681), ORS (451)



DIFFICULTIES

Difficulties by Major, Minor, Major & Minor and Main: All Switchers (1 of 2)

Switchers, ordered on major



Note: Major & Minor may not equal the total of Major plus Minor due to rounding

	Major	Minor	Major & Minor	Main*
Getting a better deal with your previous provider*	13%	11%	23%	3%
Resolving billing issue with your previous provider*	11%	8%	19%	5%
Cancelling your previous service	10%	25%	35%	3%
Your previous provider trying to persuade you to stay*	9%	21%	30%	3%
Arranging the switch so that you were not paying for your old and new services at the same time	8%	22%	30%	1%
Contacting your previous provider*	7%	16%	23%	1%
Arranging the switch so that you always had access to your services*	6%	22%	29%	2%
Paying a disconnection charge*	5%	7%	12%	1%
Paying the charge to exit your contract early*	4%	5%	9%	1%
Getting the switch to happen on the date you wanted*	4%	12%	16%	1%
Understanding the relevant steps required to switch provider	3%	22%	25%	1%
Finding time to research the market	3%	23%	27%	1%
Contacting your new provider	3%	12%	15%	1%
Having new equipment installed/services set up by your new provider*	3%	12%	15%	1%
Other devices/products you own not working with the new service*	2%	5%	8%	1%
Paying a charge for not returning equipment*	2%	3%	5%	0%

QC2A And which, if any, of these did you experience difficulty with...?

Base: All switched in last 24m (1132)

^{* 78%} of those citing a major difficulty stated which of these was the main difficulty faced, 7% did not know and 16% were unable to say which of the major factors stood out

Switchers, ordered on major



Note: Major & Minor may not equal the total of Major plus Minor due to rounding

Difficulties by Major, Minor, Major & Minor and Main: All switchers (2 of 2)

	Major	Minor	Major & Minor	Main*
Comparing what different providers are offering*	2%	19%	21%	1%
Paying an initial connection or other start-up fee, costs for a set top box to new provider etc.*	2%	12%	14%	0%
Receiving and installing new equipment from your new provider yourself*	2%	11%	12%	0%
Returning your previous provider's equipment*	2%	9%	11%	1%
Setting up a new online account*	1%	9%	11%	0%
Keeping/transferring your phone number*	2%	6%	8%	1%
Getting permission to install new equipment*	0%	2%	3%	0%

QC2A And which, if any, of these did you experience difficulty with...?

Base: All switched in last 24m (1132)

* See slide 22

Difficulties by Major, Minor, Major & Minor and Main: CPS (1 of 2)

CPS, ordered on major

Note: Major & Minor may not equal the total of Major plus Minor due to rounding



	Major	Minor	Major & Minor	Main*
Getting a better deal with your previous provider*	12%	12%	24%	3%
Resolving billing issue with your previous provider*	11%	7%	18%	5%
Cancelling your previous service	11%	27%	38%	4%
Your previous provider trying to persuade you to stay*	11%	23%	34%	4%
Arranging the switch so that you were not paying for your old and new services at the same time	8%	26%	34%	1%
Contacting your previous provider*	7%	16%	23%	1%
Arranging the switch so that you always had access to your services*	7%	23%	29%	2%
Paying a disconnection charge*	5%	7%	12%	1%
Paying the charge to exit your contract early*	4%	5%	9%	1%
Getting the switch to happen on the date you wanted*	4%	13%	17%	1%
Understanding the relevant steps required to switch provider	4%	23%	27%	1%
Finding time to research the market	4%	24%	28%	1%
Contacting your new provider	3%	15%	17%	1%
Having new equipment installed/services set up by your new provider*	3%	16%	19%	1%
Other devices/products you own not working with the new service*	2%	6%	8%	1%
Paying a charge for not returning equipment*	2%	4%	6%	0%

QC2A And which, if any, of these did you experience difficulty with...? Base: All CPS (681) * see slide 22

CPS, ordered on major



Note: Major & Minor may not equal the total of Major plus Minor due to rounding

Major Difficulties by Major, Minor, Major & Minor and Main: CPS (2 of 2)

	Major	Minor	Major & Minor	Main*
Comparing what different providers are offering*	2%	21%	23%	0%
Paying an initial connection or other start-up fee, costs for a set top box to new provider etc.*	2%	13%	15%	0%
Returning your previous provider's equipment*	2%	11%	13%	1%
Setting up a new online account*	2%	10%	12%	0%
Receiving and installing new equipment from your new provider yourself*	1%	9%	11%	0%
Keeping/transferring your phone number*	1%	5%	7%	1%
Getting permission to install new equipment*	0%	3%	4%	0%

QC2A And which, if any, of these did you experience difficulty with...?

Base: All CPS (681)

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* See slide 22

Major Difficulties by Major, Minor, Major & Minor and Main: ORS (1 of 2)

ORS, ordered on major

Note: Major & Minor may not equal the total of Major plus Minor due to rounding



	3				
	Major	Minor	Major & Minor	Main*	
Getting a better deal with your previous provider*	14%	8%	22%	4%	
Resolving billing issue with your previous provider*	12%	9%	20%	6%	
Cancelling your previous service	9%	21%	30%	2%	
Your previous provider trying to persuade you to stay*	7%	18%	25%	1%	
Arranging the switch so that you were not paying for your old and new services at the same time	7%	15%	22%	1%	
Contacting your previous provider*	7%	15%	22%	1%	
Arranging the switch so that you always had access to your services*	6%	22%	27%	2%	
Paying a disconnection charge*	5%	8%	13%	1%	
Paying the charge to exit your contract early*	4%	5%	9%	1%	
Getting the switch to happen on the date you wanted*	4%	10%	14%	1%	
Understanding the relevant steps required to switch provider	3%	20%	23%	1%	
Finding time to research the market	2%	22%	25%	1%	
Contacting your new provider	2%	9%	11%	0%	
Having new equipment installed/services set up by your new provider*	2%	6%	8%	1%	
Other devices/products you own not working with the new service*	2%	5%	8%	1%	
Comparing what different providers are offering*	2%	17%	19%	0%	

QC2A And which, if any, of these did you experience difficulty with...? Base: All ORS (451) * see slide 22

ORS, ordered on major



Note: Major & Minor may not equal the total of Major plus Minor due to rounding

Major Difficulties by Major, Minor, Major & Minor and Main: ORS (2 of 2)

	Major	Minor	Major & Minor	Main*
Receiving and installing new equipment from your new provider yourself*	2%	13%	14%	0%
Paying an initial connection or other start-up fee, costs for a set top box to new provider etc.*	2%	11%	13%	1%
Keeping/transferring your phone number*	2%	7%	9%	1%
Paying a charge for not returning equipment*	1%	2%	3%	0%
Returning your previous provider's equipment*	1%	7%	8%	0%
Setting up a new online account*	1%	8%	9%	1%
Getting permission to install new equipment*	0%	1%	1%	0%

QC2A And which, if any, of these did you experience difficulty with...?

Base: All ORS (451)

* See slide 22



Summary of 'process related' difficulties

Major process difficulties: CPS & ORS

Major Difficulties

Minor Difficulties

	Switchers	CPS	ORS	Switchers	CPS	ORS
Cancelling your previous service	10%	11%	9%	25%	27%	21%
Getting the switch to happen on the date you wanted	4%	4%	4%	12%	13%	10%
Arranging the switch so that you always had access to your services	6%	7%	6%	22%	23%	22%
Arranging the switch so that you were not paying for your old and new services at the same time	8%	8%	7%	22%	26%	15%
Total process	18%	20%	16%	48%	52%	41%

QC2A And which, if any, of these did you experience difficulty with...? Base: All switched in last 24m (1132), All switched via CPS (681), ORS (451)

Arrow denotes sig difference
Direction of difference by up or down arrow
Colour to which group the difference applies to



Difficulties experienced: overview by process

	All switched	CPS	ORS
Any major difficulty	41%	42%	38%
Any major process difficulty*	18%	20%	16%
Any minor difficulty	72%	76%	67%
Any minor process difficulty*	48%	52%	41%
Any difficulty (major or minor)	76%	79%	71%
Any difficulty (major or minor) process difficulty*	54%	58%	49%

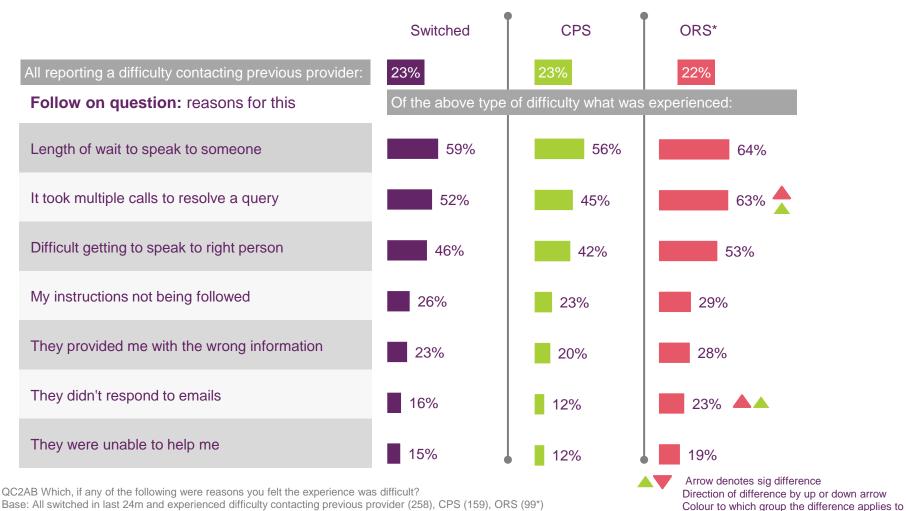
QC2A And which, if any, of these did you experience difficulty with...? Base: All switched in last 24m (1132), CPS (681), ORS (451)

^{*} Process difficulties are set out on previous slide

Reasons for citing difficulty contacting previous provider



Those reporting ANY difficulty (Major/Minor) contacting previous provider: specific difficulties experienced

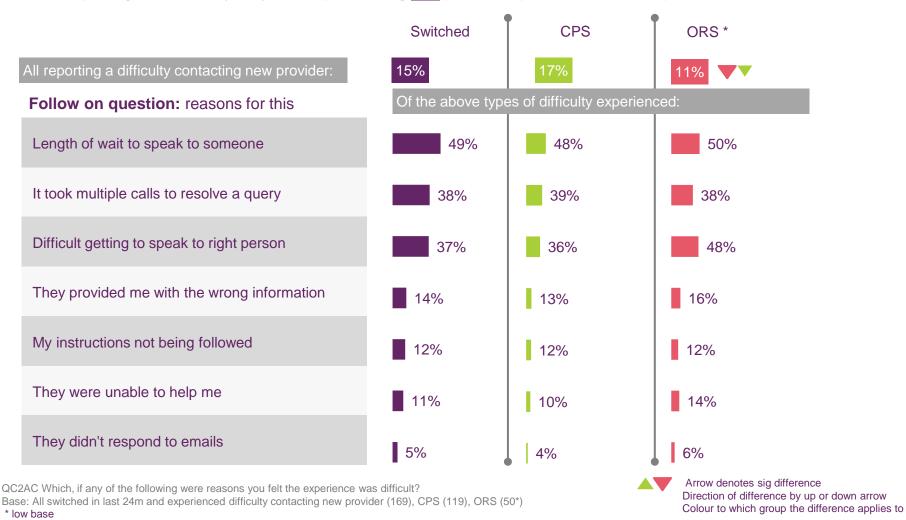


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Reasons for citing difficulty **contacting new** provider



Those reporting ANY difficulty (Major/Minor) contacting new provider: specific difficulties experienced

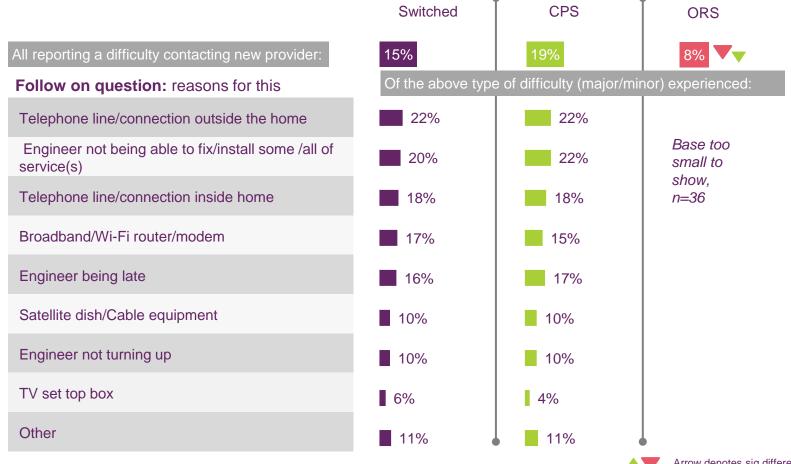


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Reasons for citing difficulty having equipment installed by provider

Those reporting ANY difficulty (Major/Minor) having new equipment installed by provider: specific difficulties experienced



QC2AG Which, if any of the following were reasons you felt the experience was difficult?

Base: All switched in last 24m and experienced difficulty having new equipment installed by new provider (166), CPS (130)

Arrow denotes sig difference
Direction of difference by up or down arrow
Colour to which group the difference applies to

Reasons for difficulty setting up/receiving equipment yourself



% citing difficulty Analysis among all those citing minor/major difficulty with this aspect **ORS Switchers** CP The local connector Difficulty in the box was set up 12% 11% 14% installation process wrong so engineer had to come out to sort it out. Female, 33, ORS I was struggling Despite my clear Engineer problems Simply getting the router **Installation Problems** with the setup explanation of roof to work and getting instructions. access problems. installation help from the Male, 42, CPS the first guy out to company proved difficult install had no and unreliable. Male, equipment needed 54, ORS Male, 41, CPS The instruction We did not booklet only understand how Installing the The engineer was called contained half of to set it up broadband, some in at the last minute and the info and the correctly. Male, of the steps were was annoyed, he was in Poor signal to other half of the confusing. 21, CPS a rush to get off and did start with. booklet was blank. Female 29. CPS not have time to show me engineer had to Male, 35, CPS the controls or explain the resolve this. Twice I was sent the sysyem. Male, 49, CPS Female, 59, ORS wrong items. When I phoned to tell them, Needed Equipment shipment the phone operator engineer visit. complications was unclear what I Female, 30, should do. Female. They were unable to **CPS** 55. CPS Delivery of We didn't have our set up the new equipment caused equipment delivered broadband and problems as the Equipment was not and had to chase them phone line. Female, No instructions delivery company sent when up to send a new box; 30, ORS came, had to didn't leave the promised and I had when they did, it look it up online router with a to contact to have it wouldn't work with our Male, 18, CPS neighbour as re-sent. Male, 29, settings on the TV. instructed. Male, ORS Female, 20, ORS 45, ORS

QC2AH You mentioned you experienced difficulty receiving or setting up equipment from your new provider yourself/or by a member of your household. What was it about the experience that was difficult? Major/ Minor, Unprompted.

Reasons for difficulty keeping/transferring phone number



Analysis among all those citing minor/major difficulty with this aspect

It was more effort than I had time for.

Female, 19, CPS

Length of process

It took too long. I

was left without

phone and

broadband for 3

weeks. Male, 54,

CPS

Took a long time and communication was bad. *Male, 23, ORS*

The time it took when transferring my number. My phone line was down for a few days. *Female*, *29*, *CPS*

Inconvenience of having to contact old provider and new one that I wanted to keep my number.

Male, 19, CPS

Customer service problems

Trying to find the right person to speak to and then trying to get them to understand what I wanted to do. *Female*, *36, ORS*

Terrible
customer
services who did
not speak very
good English.
Female, 59,
ORS

Incompetent

staff not doing

what they said

they would.

Male, 55, ORS

Cwitch are CD

Switchers CP ORS 8% 7% 9%

% citing difficulty

Had to make the request on several different occasions. They initially tried to put me off taking my number. *Female, 41, CPS*

Unhelpful previous provider

The request to keep my old number was ignored until I persisted several times to have it honoured.

Male, 45, CPS

having to ask questions.

Female, 44,
ORS

Had to have temporary new

Complicated process

number before I

could get my old number back.

Female, 53, CPS

The process you have to go through is lengthy and confusing.

Female, 21, CPS The company did appear to be rather disinclined to offer full support throughout process as a possible means of delaying or reversing a decision to change provider. *Male*, *33*, *ORS*

QC2AD You mentioned you experienced difficulty keeping/transferring your phone number. What was it about the experience that was difficult? Major/ Minor. Unprompted

Not knowing

what to do -

Reasons for difficulty cancelling the service



Analysis among all those citing minor/major difficulty with this aspect

Old provider attempts to

retain the customer

It was a while

before they let us

cancel and they

made us stay with

them until the end of

the month. Male.

21. CPS

Female, 55.

CPS

They were trying to persuade me to stay but couldn't offer me a better price and just kept telling me how awful my new provider were. I had to repeat myself many times. Female, 34, ORS

Customer service difficulties

The provider were

difficult to pin

down to get them

to cancel the

service. Male 35,

CPS

Difficult to cancel online, or through email. Female, 60, **CPS**

They kept sending me to different departments over the phone. Female, 23, **CPS**

> The customer service was awful and it was nearly impossible to actually get hold of anyone. Female, 29, CPS

Hidden/Exit charges

The provider tried to impose exit penalties even though the contract period had ended. Male, 50, ORS

The provider was incompetent at cancelling our previous contract, they continued to charge us for an additional month until we contacted them again. Male, 40, CPS

% citing difficulty **Switchers CP ORS** 35% 38% 30%

Having to call a number of times and long waits when trying to call to cancel.

Female, 31, CPS

Trying to get them to collect the items supplied by previous provider and continual correspondence trying to get me back!. Female, 68, CPS

> realised they were still charging me for a set-top box I had already returned to them, and they have STILL NOT refunded me.

Unhelpful previous

provider

Male, 39, CPS

They were very persistent on the phone with trying to keep me as a customer.

Very rude &

pushy sales

people.

Female, 40,

ORS

Female, 28, CPS

Dispute on the amount owed to previous supplier.

Kept ringing me to

offer better prices

than I was paying

previously.

Female, 64, CPS

I contacted them when I

QC2AE You mentioned you experienced difficulty cancelling your previous service. What was it about the experience that was difficult? Major/Minor. Unprompted



Reasons for difficulty getting the switch to happen on dates OFCOM you wanted



% citing difficulty Analysis among all those citing minor/major difficulty with this aspect **ORS** CP **Switchers** 17% 14% 16% Could not switch The install date soon enough. offered would have Had to wait 2 left me with no Provider being unable weeks. Male 30, Internet or landline to meet clients needs ORS for a week. Male, 41, CPS New provider could not arrange an engineer. Male, 60, Finding a suitable ORS We had to go Just could not Dates were all date two weeks switch on the day taken up so I without TV or that I wanted so had had to wait for 2 broadband. to wait. Female, 19, weeks. Male, Female, 24, **CPS** They were not 29, CPS **CPS** able to offer the Unavailability of They didn't have any day I wanted. dates available for service Female, 30, Our internet when we wanted. **CPS** connection went Perhaps very busy or Engineer had to down, our previous shortage of staff. rearrange provider kept coming Female, 21, CPS installation time. up with different Male, 42, CPS excuses and we couldn't arrange new cover. The TV was set on a There were no Female, 44, CPS different date to the dates available that phone and broadband as suited my days off this work was done by 2 Engineer did not arrive work. Female, 55, separate engineers. and we were without any **CPS** Female, 57, CPS service for 2 weeks. Male, 33, CPS

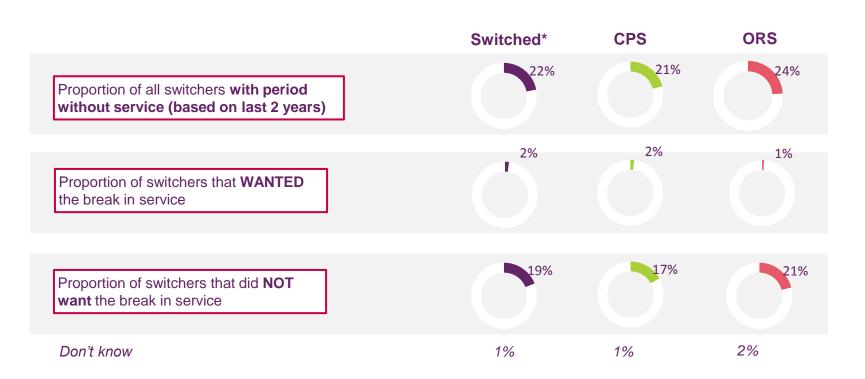
QC2AF You mentioned you experienced difficulty getting the switch to happen on the date you wanted. What was it about the experience that was difficult? Major/ Minor. Unprompted



LOSS OF SERVICE



Experience of loss of service when switching, and whether this was wanted



QG8 When you switched, did you experience any period of time without any of your services? QG11 Did you want the break in service?

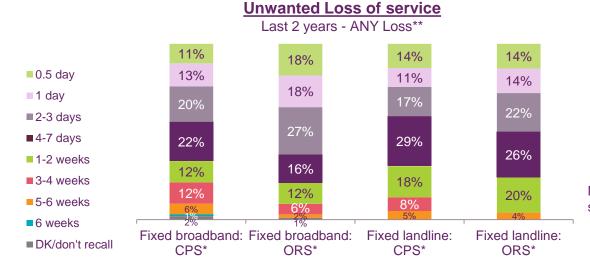
Base: All switched in last 24m (1132), All CPS (681), ORS (451)/ All switchers in last 24m who had period without service: All switched (252), All switched via CP (144), (125), ORS (108). C. 1-2% in each sample group did not know whether the loss of service was wanted or unwanted and c. 5%-6% did not recall whether there was a loss of service.

* Bespoke analysis: 21% of those switching to Openreach experienced an unwanted loss of service which compares to 15% among those switching to Virgin.

Unwanted loss of service by type of switch



Unwanted loss of		CPS			ORS			
service Last 2 years	Any	Fixed broadband*	Fixed landline*	Pay TV	Any	Fixed broadband*	Fixed landline*	Pay TV
% experiencing unwanted loss	17%	12%	10%	6%	21%	19%	11%	4%
Mean loss (length)**	n/a	9 days	8 days	Base too low to show Pay TV	n/a	5 days	6 days	Base too low to show Pay TV



Note: The fixed broadband sample in this study includes dual (FL & BB) and triple play(FL, BB and pay TV) customers only. These account for around two thirds of fixed broadband customers

Note: Base too low to

show pay TV

QG8 When you switched, did you experience any period of time without any of your services? QG9 Which services did you lose for a period of time? / G10 How long were you without service? / QG11 Did you want the break in service?

Base: All switched in last 24m: CPS (681), ORS (451) / Base: All switchers in last 24m who had period without service up to 6 weeks and did not want this: Fixed broadband – CPS (82*), Fixed broadband – ORS (83*), Fixed landline – CPS (66*), Fixed landline – CPS (50*) *Low base size treat as indicative only

** ANY Loss = up to 6 weeks. 3 outliers have been excluded from the data, these respondents reported a loss in excess of 6 weeks (FLL – one 8 weeks; FBB – one 8 weeks, one 2 months). This has no impact on the total proportion experiencing unwanted loss of service. n/a = not available

Unwanted loss of service: reasons



Last 2 yrs	Switched	CPS	ORS*
All switchers with period without service (who did not want this)	19%	17%	21%
Delay in service activation	25%	22%	28%
The new provider gave me a starting date that was after the end of my previous contract	17%	17%	17%
There was a fault with the line	16%	18%	15%
Delay in broadband installation	14%	12%	16%
Problems/a fault with the equipment (e.g. satellite dish, cable box, broadband router)	9%	12%	5%
To switch on a particular date, that I wanted	8%	8%	7%
Delay in landline installation	9%	13%	5%
Delay in delivery of the equipment	8%	8%	7%
Previous service not cancelled correctly	7%	6%	8%
Delay in cable installation	6%	8%	3%
I cancelled my previous service before arranging my new one	2%	3%	1%
The wrong equipment was provided /needed something extra	2%	3%	1%
Delay in satellite dish installation	1%	2%	1%
Don't know/can't recall	9%	7%	13%

QG8 When you switched, did you experience any period of time without any of your services? QG12 Why did you have a period without service? Base: All switchers in last 24m who had period without service and did not want this: (213), CPS (118), ORS (95*) *Low base size treat as indicative only



Unwanted loss of service: summary of reasons

	Switchers	CPS	ORS
Delay in service activation/installation	42%	42%	42%
Delay in service activation	25%	22%	28%
Delay in broadband/landline/cable/satellite installation	23%	26%	20%
Difficulties co-ordinating	31%	32%	29%
The new provider gave me a start date that was after the end of my previous contract	17%	17%	17%
I cancelled my previous service before arranging my new one	2%	3%	1%
To switch on a particular date, that I wanted	8%	8%	7%
Previous service was not cancelled correctly	7%	6%	8%
Issues with equipment	17%	20%	14%
Problems/fault with the equipment (e.g. satellite dish, cable box, router)	9%	12%	5%
Delay in delivery of the equipment	8%	8%	7%
The wrong equipment was provided /needed something extra	2%	3%	1%

QG8 When you switched, did you experience any period of time without any of your services? QG12 Why did you have a period without service?

Base: All switched in last 24m and experienced an unwanted period without service (213), CPS with unwanted period without service (118), ORS with unwanted period without service (95*)

*Low base size treat as indicative only

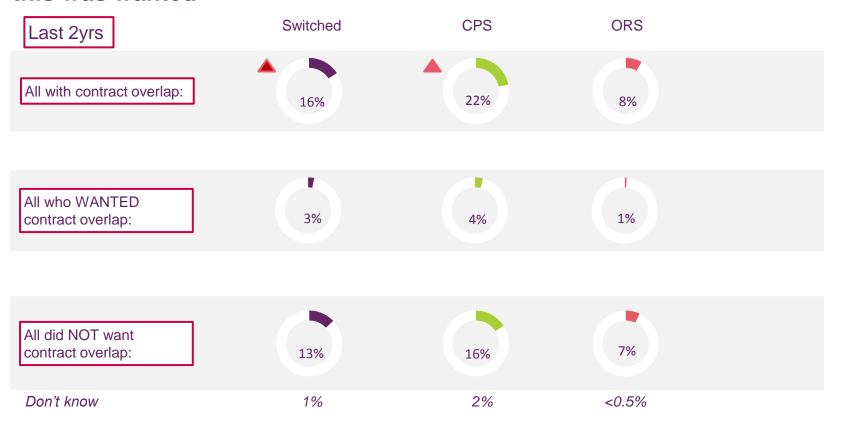




DOUBLE BILLING/CONTRACT OVERLAP



Experience of double billing/contract overlap when switching, and whether this was wanted



NB: The following charts are based on those who did NOT want a contract overlap

QG3 Did the contracts for your old and new service(s) overlap at all? QG6 Did you want the contracts to overlap? Base: All switched in last 24m (1132), CPS (681), ORS (451)

Note: Figures include overlap of 1 day, excluding these only reduces the proportion of CPS with contract overlap to 21%



Double billing/contract overlap reasons (1 of 2)

Last 2yrs

Last Zyro			
	Switched	CPS	ORS
All with contract overlap	16%	22%	8%
I had already signed up with my new provider, and wasn't aware of the notice period with my previous provider	16%	14%	
To ensure I always had a BROADBAND service(s) during the switch	16%	18%	
To switch to a better service immediately	15%	14%	
Due to the available engineer appointment dates	14%	15%	Base too
The new provider gave me a date that was before the end of my previous contract	13%	15%	small for
Previous service not cancelled correctly	12%	12%	ORS
The previous service wasn't cancelled on the date requested	11%	11%	
To sign up with my new provider before a deal ran out	9%	11%	
To ensure I always had a PHONE service(s) during the switch	11%	11%	

QG3 Did the contracts for your old and new service(s) overlap at all? QG7 Why did the contracts overlap?

Base: All switched in last 24m (1132), CPS (681), ORS (451)/All who had contracts which overlapped: Switched (185), CPS (149)

Note: Figures include overlap of 1 day, excluding these only reduces the proportion of CPS with contract overlap to 21%





Double billing/contract overlap reasons (2 of 2)

Last 2yrs

All with contract overlap

Switched CPS ORS

22%

8%

To ensure I always had a pay TV service(s) during the switch	9%	10%
To switch on a particular date, that I wanted	8%	6%
To ensure I kept my landline number	6%	7%
To get faster broadband speed as soon as possible	5%	6%
To get inclusive calls as soon as possible	1%	1%
Other	8%	7%

Base too small for ORS

QG3 Did the contracts for your old and new service(s) overlap at all? QG7 Why did the contracts overlap?

Base: All switched in last 24m (1132), CPS (681), ORS (451)/All who had contracts which overlapped: Switched (185), CPS (149)

Note: Figures include overlap of 1 day, excluding these only reduces the proportion of CPS with contract overlap to 21%

Double billing/contract overlap: summary of reasons



Last 2yrs

All with contract overlap

	Switched	CPS
Difficulties co-ordinating	61%	58%
Already signed up with new provider and wasn't aware of notice period	16%	14%
Engineer availability	14%	15%
Previous service wasn't cancelled on date requested	11%	11%
New provider gave me date that was before end of previous contract	13%	15%
Previous service not cancelled correctly	12%	12%
To switch on particular date that I wanted	8%	6%
To ensure continuity of service	26%	28%
To ensure I always had a broadband service during the switch	16%	18%
To ensure I always had a phone service during the switch	11%	11%
To ensure I kept my landline number	6%	7%
To ensure I always had a Pay TV service during the switch	9%	10%
To get a better service /deal immediately	27%	29%
To switch to a better service immediately	15%	14%
To sign up with my new provider before a deal ran out	9%	11%
To get faster broadband as soon as possible	5%	6%
To get the channels I wanted as soon as possible	2%	2%
To get inclusive calls as soon as possible	1%	1%
To get a channel in time to view a specific event	1%	1%

QG7 Why did the contracts overlap?

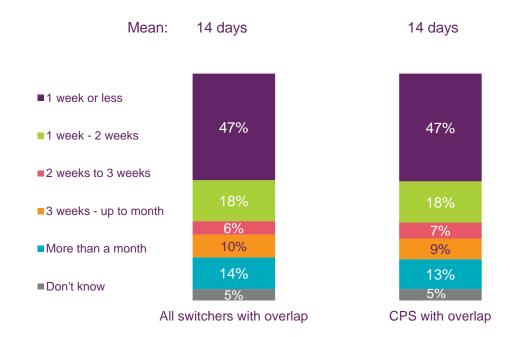
Base: All who had contracts which overlapped: Switched (185), CPS (149), base too low to show for ORS (36)



Length of double billing/contract overlap

Length of contract overlap

Last 2 years - ANY



QG5 How long did the contracts overlap for? In other words how long were you paying for both services at the same time? Base: All switched and reported overlap (185), All CPS switched and reported overlap (149), Base too low to show for ORS (36)

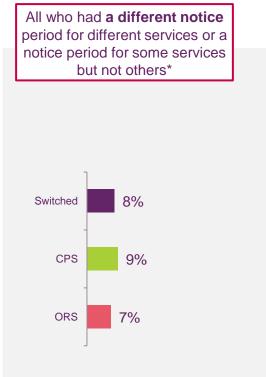


GIVING NOTICE AND CHARGES



Types of notice period/when gave notice





QG1 Before you left your previous (INSERT SERVICES SWITCHED AT QB3) service(s) provider, you may have been required to give them notice. If so, which of the following applied/QG2 Before you left your previous (INSERT SERVICES SWITCHED AT QB3) service(s) provider, you may have been required to give them notice. / QG2. If you did so, at what point did you give notice to your provider that you wanted to leave?

Base: All switched in last 24m (1132), CPS (681), ORS (451), 1 notice period for all services: total (637), CPS (419), ORS (218)

^{* 35%} of switchers could not recall/did not know whether they had a single notice period, different notice periods or no notice period for their services, 29% for CPS and 45% for ORS.

Overall summary on charges



	All paying an early termination charge (ETC)	All finding they had to pay disconnection charge	All finding they had to pay charge for equipment	All paying disconnection charge	All paying charge for equipment
All switched	9%	22%	14%	10%	3%
CPS	8%	22%	16%	9%	3%
ORS	11%	24%	11%	10%	2%



Point at which found out they had to pay an ETC

	Switched	CPS	
All who had to pay the charge	9%	8%	Base too small for ORS
Point where found out they had to pay ETC (based on all who had to pay)		*	
Before I had looked at any alternatives/contacted any other providers	25%	32%	
After I had looked at alternatives but before I had made a final decision	23%	21%	
After I had made a decision on an alternative provider, but before I had signed up	13%	18%	
After I had signed up with an alternative provider	32%	23%	
Don't know/don't recall	7%	7%	

QC1AB Did you have to pay a charge before the end of your minimum contract period? QC1AG Which of the following best describes when you found out you had to pay the charge? Base: All switched in last 24m who paid ETC: total (105), CPS (57*), * LOW BASE TREAT AS INDICATIVE ONLY



Point at which found out they had to pay a disconnection charge

	Switched	CPS	ORS
All who found out they had to pay the charge NB: they may not have paid it	22%	22%	24%
Point where found out they had to pay disconnection charge (based on all found out they had to pay it)			
Before I had looked at any alternatives/contacted any other providers	19%	22%	14%
After I had looked at alternatives but before I had made a final decision	19%	16%	22%
After I had made a decision on an alternative provider, but before I had signed up	17%	20%	12%
After I had signed up with an alternative provider	32%	29%	37%
Don't know/don't recall	14%	13%	15%

QC1A When you last changed your provider, did you find out that you had to pay disconnection charges? QC1AG Which of the following best describes when you found out you had to pay the charge?

Base: All switched in last 24m (1132), CPS (681), ORS (451), All switchers who found out they had to pay the charge: total (254), CPS (148), ORS (106)



Point at which found out they had to pay a charge for not returning equipment

	Switched	CPS	ORS*
All who found out they had to pay the charge (NB they may not have paid the charge)	14%	16%	11%
Point where found out they had to pay charge for not returning equipment (based on all found they had to pay)			
Before I had looked at any alternatives/contacted any other providers	17%	16%	20%
After I had looked at alternatives but before I had made a final decision	19%	19%	20%
After I had made a decision on an alternative provider,	15%	19%	6%
but before I had signed up	1070	1070	
but before I had signed up After I had signed up with an alternative provider	30%	26%	39%

QC1A When you last changed your provider, did you find out that you had to pay a charge for not returning equipment? QC1AG Which of the following best describes when you found out you had to pay the charge?

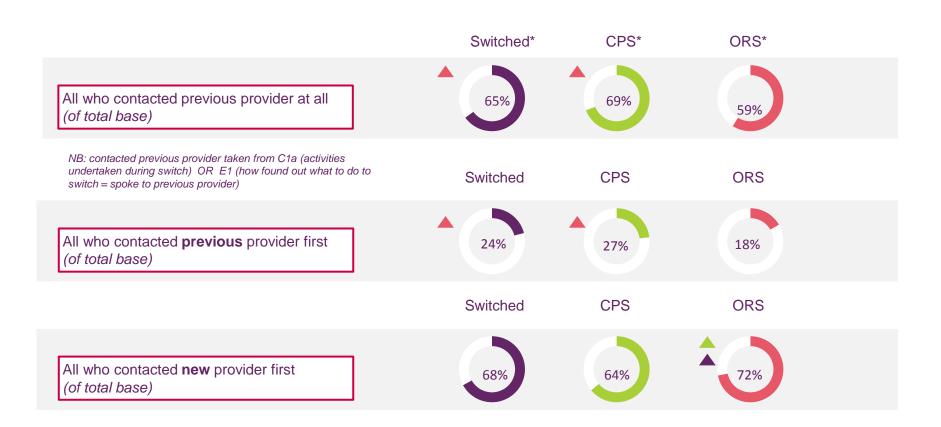
Base: All switched in last 24m (1132), CPS (681), ORS (451), All switchers who found out they had to pay the charge: total (159), CPS (108), ORS (51*) *low base size treat as indicative only



CONTACT WITH PROVIDER



Overview: Point of contact on deciding to switch



QF1 Once you decided to switch your services, who did you contact first? QF3 And at what point did you contact your previous service provider?

Base: All switched in last 24m (1132), CPS (681), ORS (451); All who contacted previous provider: Switched (732), CPS (467), ORS (265)

* The proportion who recall contacting their previous provider at all rises to 71%, 77% and 62% respectively, when including those who recalled doing so at QE3 and QF1.



Point of contact: previous provider

	Switched	CPS	ORS
All who contacted previous provider (at all)	65%	69%	59%
Point of contact (of those that had contacted their previous provider)			
After I had looked at alternatives but before I had made a final decision on an alternative provider	25%	26%	24%
After I had made a decision on an alternative provider, but before I had signed up	40%	41%	37%
After I had signed up with an alternative provider	31%	32%	29%
Don't know/don't recall	14%	12%	17%

QF3 And at what point did you contact your previous service provider?

Base: All switched in last 24m (1132), CPS (681), ORS (451)/All who contacted previous provider: Switched (732), CPS (467), ORS (265)



Reasons for contacting previous provider (1 of 2)

() numbers in brackets based on total	Switched	CPS	ORS
All who contacted previous provider at all Of these, reason for contacting:	65%	69%	59%
To cancel my service/ give notice	43% (28%)	44% (30%)	40% (24%)
To confirm that service was cancelled	30% (20%)	30% (21%)	31% (18%)
To arrange the 'stop date' in order to avoid paying both providers at the same time	28% (18%)	30% (21%)	25%(15%)
To check how much my final bill would be	25% (16%)	27% (18%)	22% (13%)
To arrange the 'stop date' in order to avoid a break in service	22% (14%)	4 24% (17%)	18% (10%)
To negotiate a better deal with my current provider	17% (11%)	17% (12%)	18% (11%)
To find out if I had a notice period	14% (9%)	16% (11%)	11% (7%)
To find out what I needed to do to change provider	13% (8%)	10% (7%)	17% (10%)
To find out about any other charges for ending my contract	12% (8%)	12% (8%)	12% (7%)

QF5 And which if any of these where reasons you contacted your previous provider?

Base: All switched in last 24m (1132), All switched CPS (681), ORS (451)/ All who contacted previous provider: Switched (732), Switched CPS (467), Switched ORS (265)



Reasons for contacting previous provider (2 of 2)

() numbers in brackets based on total	Switched	CPS	ORS
All who contacted previous provider at all Of these, reason for contacting:	65%	69%	59%
To find out about any charges for ending my contract early	11%(7%)	11% (7%)	13% (8%)
To find out when my contract ended	11% (7%)	11% (7%)	12% (7%)
To complain/ report an issue	11% (7%)	9% (6%)	14% (8%)
To talk about their products and services	5% (4%)	3% (2%)	9% (5%)
To understand content that might be affected, e.g. that I might lose by switching	5% (3%)	6 % (4%)	3% (2%)
To obtain information about my contract e.g. my usage patterns/spend	4% (2%)	4% (3%)	3% (2%)
Other	1% (1%)	1% (0%)	2% (1%)
Don't know/don't recall	5% (3%)	5% (3%)	6% (3%)

QF5 And which if any of these where reasons you contacted your previous provider?

Base: All switched in last 24m (1132), All switched CPS (681), ORS (451)/ All who contacted previous provider: Switched (732), Switched CPS (467), Switched ORS (265)



Reasons for contacting previous provider: summary

All who contacted previous provider at all

Of these, reason for contacting:

	Switched	CPS	ORS
To find a better deal/search To negotiate a better deal with my current provider To talk about their products/services	22%	20%	26%
To find information about the implications of switching To find out about other charges for ending my contract To find out about charges for ending my contract early To find out when my contract ended	27%	26%	30%
Questions relating to the process To confirm that the service was cancelled To find out what I needed to do to change provider To find out if I had a notice period To cancel my service/give notice To arrange a stop date in order to avoid paying both providers at the same time To arrange the stop date to avoid paying both providers at the same time	66%	66%	66%

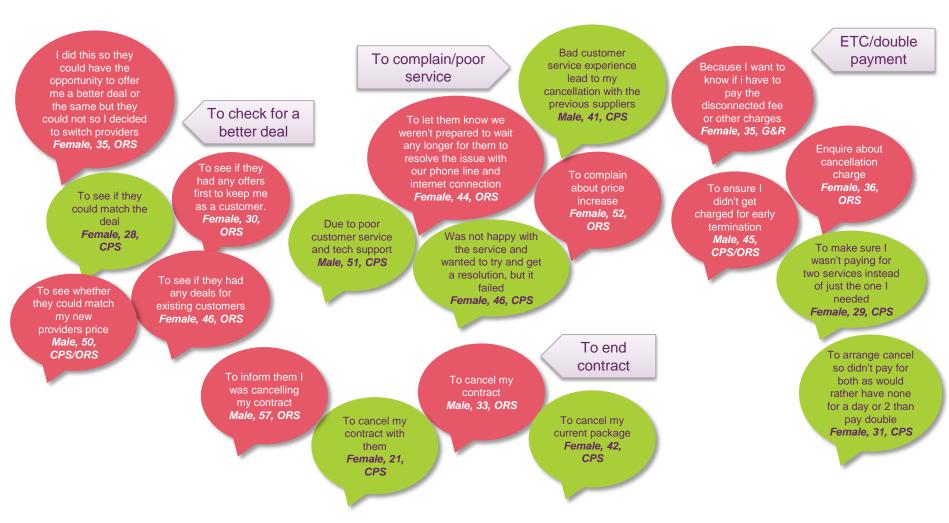
QF5 And which if any of these where reasons you contacted your previous provider?

Base: All who contacted previous provider: Switched (732), Switched CPS (467), Switched ORS (265)





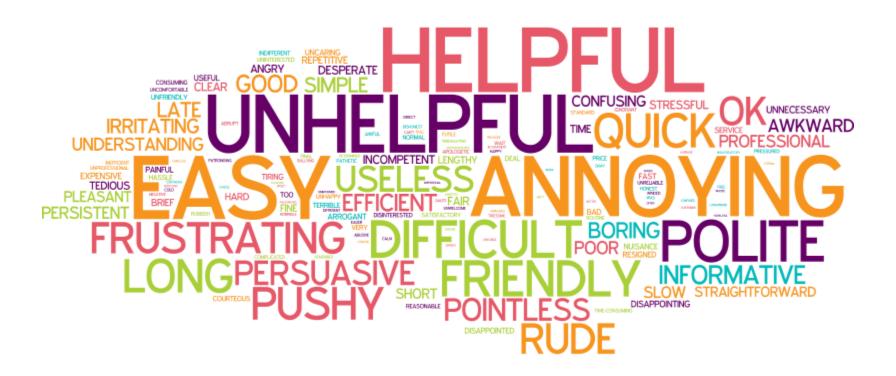
Reasons for contacting previous provider first



QF2 What was your main reason for contacting your previous provider first, instead of your new provider? Unprompted.



Spontaneous verbatims about conversations with previous provider



QF12 Thinking about all the conversations that you had with your previous provider when switching, what THREE words would you use to describe this contact with them? Base: All switchers that had contact with previous provider when switching, (902). Unprompted.



ORS

Prompted descriptions about conversations with previous provider

() numbers in brackets based on all in each sub-group

Proportion that recalled ANY contact with previous provider when switching (includes those contacted by their provider) (of total):

80%	81%	77%

CPS

Switched

Words used to describe contact (of those that recalled contact). Ordered by number of mentions.	Switched	CPS	ORS
Frustrating	44% (35%)	45% (37%)	41% (32%)
Time-Consuming	43% (34%)	45% (36%)	41% (31%)
Unhelpful	36% (29%)	36% (29%)	36% (28%)
Helpful	22% (17%)	20% (17%)	23% (18%)
Unnecessary	20% (16%)	19% (16%)	20% (15%)
Informative	18% (14%)	17% (14%)	20% (16%)
Essential	12% (9%)	12% (10%)	12% (9%)
Reassuring	7% (6%)	8% (6%)	7% (5%)
Don't know/don't recall	7% (6%)	6% (5%)	8% (6%)

QF14. And still thinking about all the conversations you had with your previous provider when switching, which of the following words would you use to describe this contact? Base: All switchers that had contact with previous provider when switching, (902), CPS (555), ORS (347)



Methods used to contact previous provider to cancel

	Switched	CPS	ORS cancel	
Proportion who contacted previous provider (of total):				
Method of contacting previous provider to cancel (of those who had contacted):	65%	69%	30%	
By calling/phone	88%	88%	93%	
Online email*	14%	13%	15%	
Online web-chat*	5%	5%	6%	
Online web-form*	4%	3%	6%	
By letter	2%	2%	3%	
By a text message	1%	1%	1%	
By social networking site*	1%	1%	1%	
Via an app *	-	-	1%	
Other	1%	-	1%	
Don't know/don't recall	3%	2%	-	
Net: Email and/or web-form	16%	14%	18%	
Net: Any online (*)	20%	19%	21%	

QF6 Which of these methods did you use to contact your provider to tell them you wanted to leave/cancel your service? Base: All switchers who contacted previous provider and: total (732), CPS (467), ORS & cancelled (143) * Online includes online email, online web-chat, online web-form, via an app, social networking site.

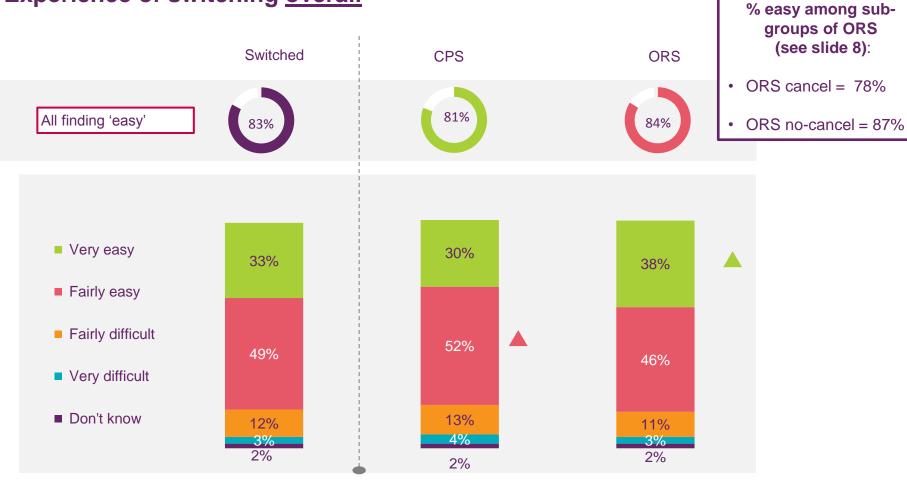




ATTITUDES TO SWITCHING



Experience of switching overall



QG13 How would you rate your overall switching experience, i.e. from the point at which you decided you wanted to switch to the point you were using your new provider's service?

Base: All switched in last 24m (1132), CPS (681), ORS (451), ORS cancel (143), ORS no cancel (308)



Arrow denotes sig difference by process Direction of difference by up or down arrow Colour to which group the difference applies to



Experience of switching by experience of major difficulties



QG13 How would you rate your overall switching experience, i.e. from the point at which you decided you wanted to switch to the point you were using your new provider's service?

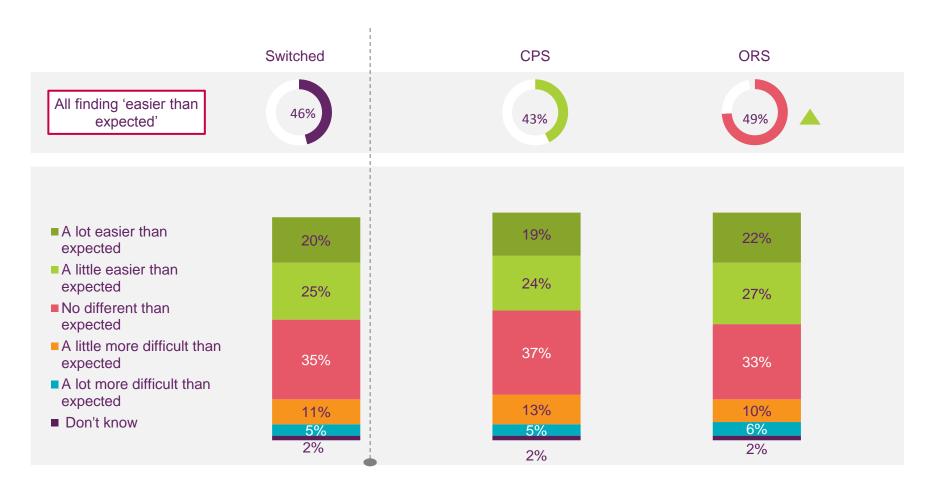
Base: All switched in last 24m (1132), All switched and experienced a major difficulty (459), All switched and experienced a minor but not major difficulty (401), All switched and experienced no difficulties (272)



Arrow denotes sig difference
Direction of difference by up or down arrow
Colour to which group the difference applies to



Experience vs. expectations



QG14 And how did this compare to what you had expected? Base: All switched in last 24m (1132), CPS (681), ORS (451)



Arrow denotes sig difference
Direction of difference by up or down arrow
Colour to which group the difference applies to

Reasons: Switching easier than expected



Having not been through the process before I expected it to be much harder, but my new provider made the switch easy by arranging everything with previous provider. *Male*, *58*, *ORS*

I expected the previous provider to make it difficult - out of 'spite' *Male, 28,*

I expected to be in dispute with my previous provider, but that didn't happen. Also my new provider was able to install the equipment very quickly.

Male, 44, CPS

Old/New Supplier

The switch didn't take as long as I had expected and both companies were very helpful during the switch. *Female*, *39*, *CPS*

Helpful Customer Service

Because I did not do anything. I just made a phone call to my service provider and rest of the things they have done by themselves. *Male*, 30, ORS

Two phone calls and it was done.

Male, 59, CPS

I thought it would be quite difficult to install especially as there was no engineer and it wasn't at all - very easy to do. *Female*, 46, *ORS*

Quicker and less time consuming due to all the information I was provided with.

Fluid communication all round, Female, 45, ORS

Female, 51, ORS

I was sure something would go wrong but nothing did Female, 45, CPS/ORS

Simple switching process

I was expecting a day without services but it was actually less than an hour. Male, 62, ORS I expected delays and problems, but everything went smoothly and in the timescale promised. *Female*, 43, ORS

> I expected some difficulty but received none *Male, 69, CPS*

> > Bad expectations/Good results

I expected some problems – at least a day without service or being billed extra – but it was all seamless.

Male, 25, ORS

QG15 Why do you say it was easier than expected? Unprompted



Reasons: Switching was as expected

I expected that there might be a bit of persuasion on my previous provider to stay with them - it didn't really bother me. Female, 65, CPS

I expected it to be easy. My new provider was anxious to get my business and so were going to be cooperative. I have always found my previous one be co-operative as well and this was no exception.

Female, 73, CPS

Old/New Supplier Previous experiences

I had been told by my daughter who had done the same move some months earlier that one side could be awkward, however the new provider did most of the arranging for me. *Male*, *70*, *ORS*

There was no difference to any other times that's I changed providers in the past. *Male*,

65. CPS

I have switched before and have had a delay in broadband service. *Female*,

36. CPS

I knew that there could have been a wait for installation. *Female*, *27*, *CPS*

Thought it would take time to install new equipment so I expected delays.

Female, 55, CPS

Switching process

knew that in order to cancel the old provider and get a new one I would have had to follow lot of steps and to wait for the new connection too. Female, 28, ORS

Because I
expected it to be
straightforward.
Female, 30,
ORS

We have switched providers in the past without too many problems so we anticipated that this time would be the same. *Female*, *51*, *CPS*

I didn't expect the change to go flawlessly due to past experience. *Female*, 60, *CPS*

Expectations and results

In this day and age it shouldn't really be difficult just to switch services, so everything went easy and as planned. *Male*, *43*, *ORS*

QG17 Why do you say it was no different than expected? Unprompted

Reasons: Switching was more difficult than expected



We felt very trapped between the two providers, as each provider kept blaming the other for having control over the line. Female, 44, ORS

I expected the new provider would sort it all out for me but they didn't and I hadn't realised I had to cancel the old myself Female, 46, CPS

Because my previous provider made it extremely difficult to switch. Male, 31, CPS

Old/New Supplier

Previous provider was not helpful and the new provider delayed the date of installation. Male. 30, CPS

> Problems with the equipment and installation meant numerous visits from an engineer and being without decent broadband service for a period of time. Female, 54, CPS

At every turn, there was a complication with changing providers. The landline didn't work, we were without a home phone number, the internet was delayed delivery, and it was impossible to find anyone to speak to on the phone. Female. 20. ORS

Customer Service Problems

> All the phone calls and being put on hold while you get passed from person to person. Male, 33, CPS

> > The length of time being put on hold. Female, 29, CPS

Complex switching process

Quicker and less time consuming due to all the information I was provided with. Female, 51, ORS

not have to do up a couple of times. Male, 54, **CPS**

I was told I would anything but ended up having to phone

Good expectations/bad

results

Thought it was a

simple easy switch

but it took a while

and was quite

complicated.

Female, 21, ORS

I never assumed there would be any problems Female. 55. **CPS**

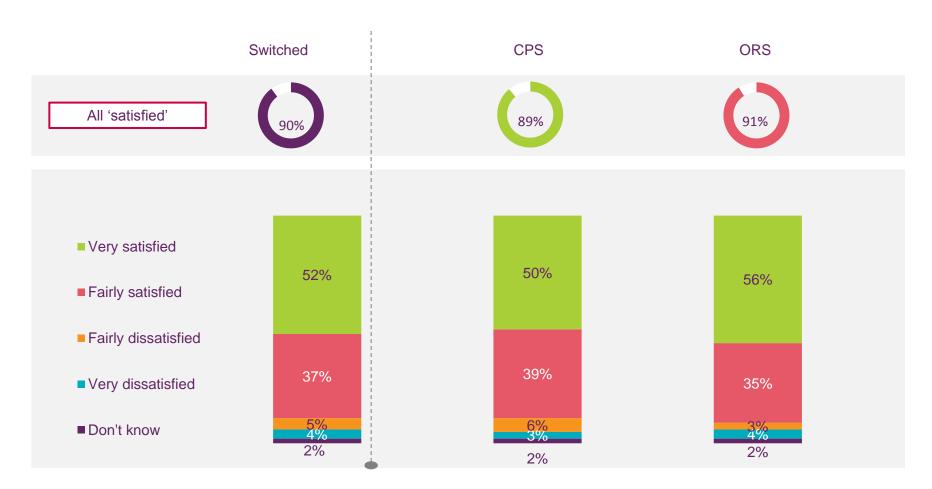
Because I know of other people who switch providers frequently and so I assumed everything would go smoothly and without consequence. Male, 71, ORS

Because I wasn't expecting a reasonably reputable company to screw us over and cancel our services for their mistakes. Male, 20, ORS

QG16 Why do you say it was more difficult than expected? Unprompted



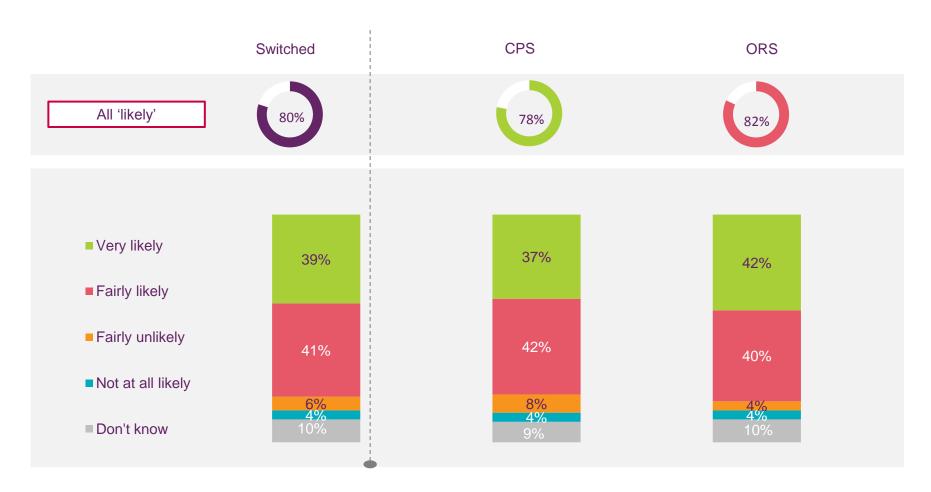
Satisfaction with decision to switch



QG19 Overall, how satisfied are you with your decision to switch provider? Base: All switched in last 24m (1132), CPS (681), ORS (451)



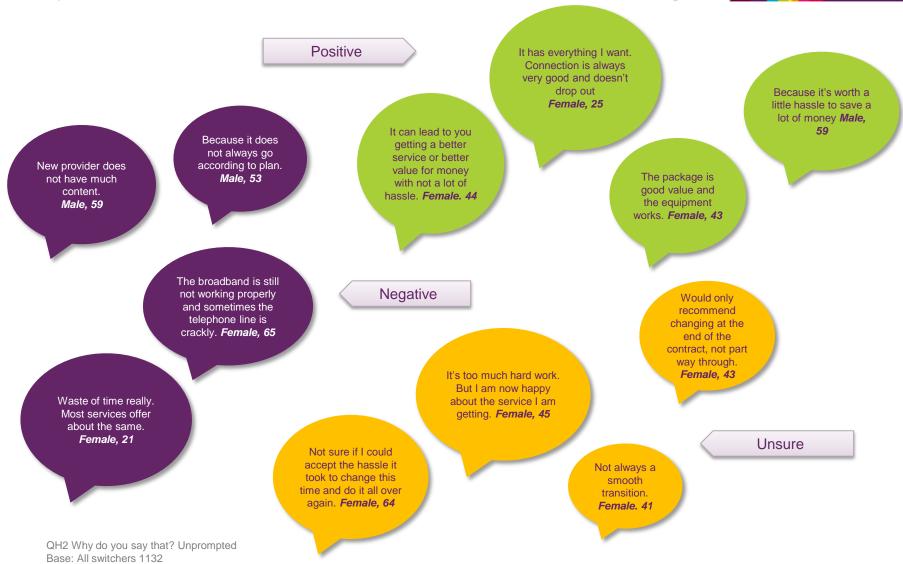
Would recommend switching to someone else



QH1. Based on your experience, how likely are you to recommend switching <INSERT RELEVANT SERVICES USED> to someone else (e.g. a friend or relative)? Base: All switched in last 24m (1132), CPS (681), ORS (451)

Why respondents would/ would not recommend switching







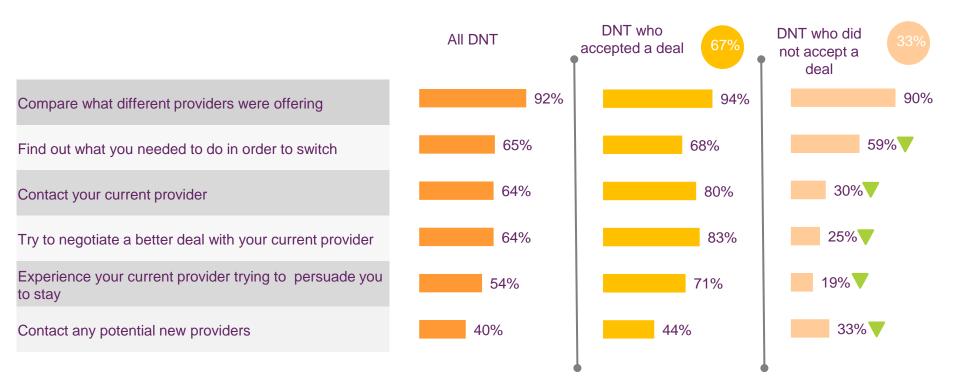
Main findings among Decided not to (DNT) switch:



ACTIVITIES UNDERTAKEN



<u>Activities</u> undertaken by those that considered switching but decided not to (DNT)



Arrow denotes sig difference between those who accepted a better deal and those who didn't Direction of difference by up or down arrow

QC3 While considering switching your provider, did you...?

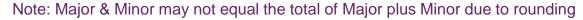
Base: All DNT (699), All DNT who accepted a better deal with current provider (466), All DNT who did not accept a better deal with current provider (233)



FACTORS IMPACTING DECISION NOT TO SWITCH

Factors impacting decisions by Major, Minor, Major & Minor and Main: (1 of 3)

Decided Not To, ordered on major





	Major	Minor	Major & Minor	Main
I negotiated/accepted a deal with my current provider	50%	17%	67%	25%
Current providers still the best deal/cheapest	47%	27%	74%	11%
There wasn't enough cost difference for it to be worth switching	42%	30%	72%	6%
Current provider has the best quality of service	40%	33%	73%	6%
Worried service wouldn't be as good with a new provider	39%	35%	74%	4%
Prefer to stay with trusted/known	37%	40%	77%	3%
Didn't want to pay initial connection/ other start-up fees e.g. costs set top box etc.	29%	32%	61%	N/a
Problems/ issues with current provider are not sufficiently bad/frequent to switch	25%	34%	60%	N/a
I was worried about being without Broadband during the switch	25%	22%	47%	2%
Concern about arranging the services to start/stop at the right time	23%	35%	59%	1%
Didn't want to lose specific benefits/stored content e.g film /specific channels which came with previous package	22%	23%	46%	3%
Do not want to lose my phone number	21%	19%	40%	1%
Lack of Choice	20%	29%	49%	3%
Didn't want to pay the disconnection charge	20%	21%	41%	1%

QC3A Which, if any, of the following were factors that made you decide to stay with your current provider? Base: All DNT (699)

Tables ordered major. Note: Main' figures may not total the net precisely due to rounding.

Factors impacting decisions by Major, Minor, Major & Minor and Main: (2 of 3)

Decided Not To, ordered on major





	Major	Minor	Major & Minor	Main
Its too time consuming to go through the process of switching from one provider to another	20%	37%	57%	2%
Hassle to set up a new online account	19%	30%	49%	N/a
I was still in a contract so couldn't leave/would need to pay	18%	16%	34%	2%
Hassle of needing to contact more than one provider	17%	35%	52%	1%
I was worried I might have to pay two providers at the same time	16%	24%	40%	1%
Didn't want to have to install new equipment myself	16%	24%	40%	N/a
Didn't want to have to get engineer in to install the new equipment services(s)	15%	24%	40%	N/a
Difficulty comparing what other providers were offering	14%	36%	50%	N/a
I was worried about being without Landline during the switch	13%	17%	31%	1%
Difficulty cancelling my service	13%	24%	36%	1%
Other devices/products I own not working with new service	12%	21%	32%	N/a
Bad experience when switching my communication services previously	11%	15%	36%	<0.5%
Didn't want to learn a new service	11%	27%	37%	N/a

QC3A Which, if any, of the following were factors that made you decide to stay with your current provider?

Base: All DNT (699) Tables ordered major. Note: Main figures may not total the net precisely due to rounding.

Factors impacting decisions by Major, Minor, Major & Minor and Main: (3 of 3)

Decided Not To, ordered on major





	Major	Minor	Major & Minor	Main
Bad experience when switching other services previously	10%	20%	30%	N/a
Difficulty when contacting potential new provider(s)	10%	21%	31%	1%
Difficulty when contacting my current provider	9%	19%	28%	0%
Would take too long to research the market	9%	28%	37%	N/a
Not knowing what to do to switch	9%	23%	32%	<0.5%
Couldn't get permission to install new equipment where I live e.g. cables, satellite etc.	8%	7%	15%	N/a
I was worried about being without pay TV during the switch	7%	16%	23%	0%
Having to return providers equipment	7%	18%	26%	N/a

QC3A Which, if any, of the following were factors that made you decide to stay with your current provider?

Base: All DNT (699)

Tables ordered major. Note: Main figures may not total the net precisely due to rounding.





Process factors that made respondents decide not to switch

	Major	Minor	Main
I was worried about being without broadband during the switch	25%	22%	2%
Concern about arranging the services to start/stop at the right time	23%	35%	1%
I was worried I might have to pay two providers at the same time	16%	24%	1%
I was worried about being without landline during the switch	13%	17%	1%
Difficulty cancelling my service	13%	24%	1%
I was worried about being without pay TV during the switch	7%	16%	0%
Net: ANY process	45%	69%	6%

79% mentioned at least one of these factors as major or minor factor in their decision not to switch

QC3A Which, if any, of the following were factors that made you decide to stay with your current provider? Base: All who considered but decided not to switch (699)

Tables ordered major. Note: Main figures may not total the net precisely due to rounding.



Contact with <u>current</u> provider as the stated reason for not switching



QC3AB You mentioned that difficulty contacting your current provider was a factor in deciding not to switch your services. What was it about the experience that was difficult? Unprompted



Contact with <u>potential new provider</u> as the stated reason for not switching



QC3AC You mentioned that difficulty contacting your potential new provider(s) was a factor in deciding not to switch your services. What was it about the experience that was difficult? Unprompted





Reasons for stating problems cancelling the service



QC3AF You mentioned you experienced difficulty cancelling your service. What was it about the experience that was difficult? Unprompted



CONTACT WITH PROVIDER



Point at which DNTs contacted current provider

All DNT DNT who accepted a deal DNT who did not accept a deal

Proportion that contacted current provider (of total)

All DNT who did not accept a deal 31%

Point/ points when contacted current provider (of those that had done so):				
Before I had looked at any alternatives/contacted any other providers	19%	18%	22%	
After I had looked at alternatives but before I had made a final decision	65%	69% 📥	47%	
After I had made a decision on an alternative provider, but before I had signed up	10%	9%	18% 📥	
After I had signed up with an alternative provider	4%	3%	3%	
Don't know/don't recall	8%	6%	17% 📤	

QF4 And at what point or points did you contact your current service provider?

Base: All DNTs who contacted previous provider and: total (466), DNTs who accepted a better deal (394), DNTs who did not accept a better deal (72*) *Low base size



Reasons for contacting previous provider (1 of 2)

	DNT	DNT who accepted a deal	DNT who did not accept a deal
Proportion that contacted current provider (of total):	69%	84%	31%
Reasons for contacting previous provider (of those that did):			
To negotiate a better deal with my current provider	57%	60%	39%
To talk about their products and services	20%	20%	18%
To cancel my service/ give notice	16%	16%	11%
To find out when my contract ended	15%	14%	24% 📤
To find out what I needed to do to change provider	12%	11%	17%
To find out if I had a notice period	12%	10%	18%
To check how much my final bill would be	9%	9%	11%
To complain/ report an issue	9%	8%	14%
To obtain information about my contract e.g. my usage patterns/spend	8%	8%	11%

QF5 And which if any of these where reasons you contacted your previous provider?

Base: All decided not to (699), DNT and accepted a deal (466), DNT and did not accept a deal (233). All who contacted previous provider: DNT (444), Accepted a deal (375), Did not accept a deal (69)



Reasons for contacting previous provider (2 of 2)

	DNT	DNT who accepted a deal	DNT who did not accept a deal
Proportion that contacted current provider (of total):	69%	84%	31%
Reasons for contacting previous provider (of those that did	d):		
To understand content that might be affected, e.g. that I might lose by switching	8%	9%	7%

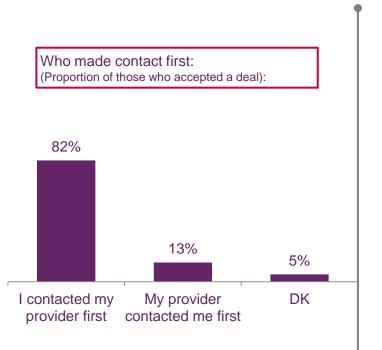
To understand content that might be affected, e.g. that I might lose by switching	8%	9%	7%
To find out about any other charges for ending my contract	8%	7%	11%
To find out about any charges for ending my contract early	8%	7%	11%
To arrange the 'stop date' in order to avoid a break in service	6%	5%	8%
To arrange the 'stop date' in order to avoid paying both providers at the same time	5%	5%	7%
To confirm that service was cancelled	3%	3%	3%
Other	3%	3%	6%
Don't know/don't recall	5%	4%	8%

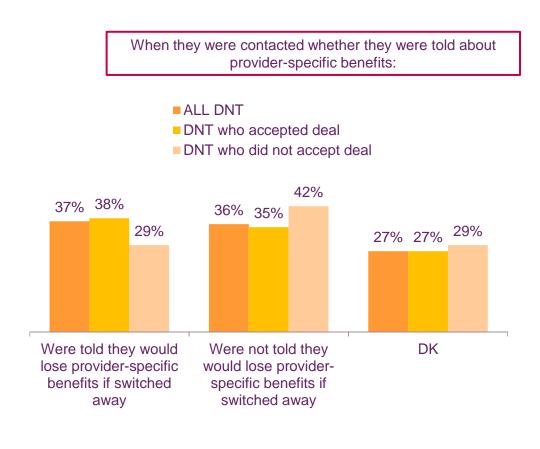
QF5 And which if any of these where reasons you contacted your previous provider?

Base: All decided not to (699), DNT and accepted a deal (466), DNT and did not accept a deal (72*)



Who made first contact when negotiated/ accepted a better deal





QC3AE When you negotiated/ accepted a deal with your current provider, who made the first contact? Base: All who considered but decided not to switch and negotiated/ accepted a deal: (465)



Methods used to contact provider to cancel: DNTs

DNT who accepted a deal

DNT who did not accept a deal

Proportion that contacted current provider (of total):



All DNT





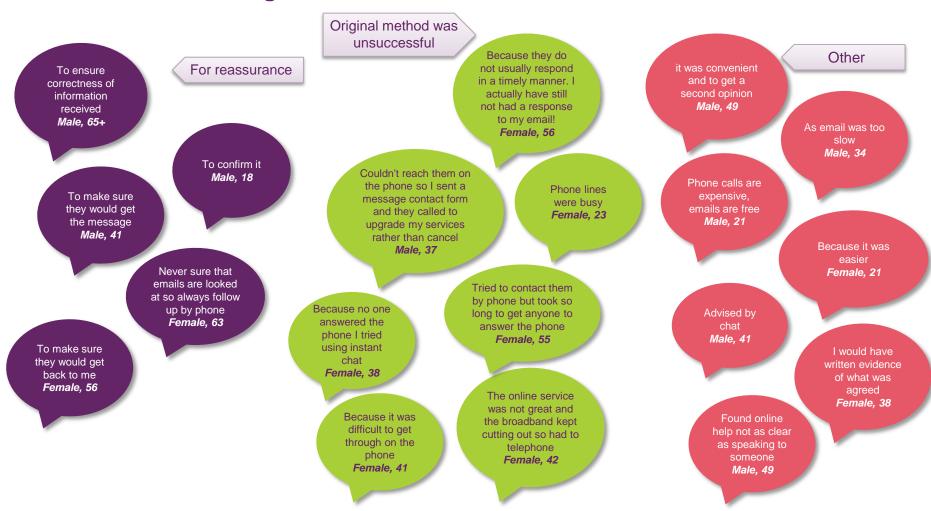
Method of contacting current provider to tell them they wanted to leave (of those made contact):				
By calling/phone	85%	86%	82%	
Online email*	8%	8%	8%	
Online web-chat*	7%	7%	8%	
Online web-form*	6%	5%	7%	
Via an app*	1%	1%	1%	
By a text message	1%	1%	1%	
By social networking site*	1%	1%	3%	
By letter	-	-	-	
Other	1%	1%	1%	
Don't know/don't recall	4%	3%	7%	
Net: Email and/or web-form	13%	12%	15%	
Net: Any online*	18%	18%	22%	

QF6 Which of these methods did you use to contact your provider to tell them you wanted to leave/cancel your service? Multi-code

Base: All DNTs who contacted previous provider and: total (444), DNTs who accepted a better deal (375), DNTs who did not accept a better deal (69*) *Low base size treat as indicative only * Online = email, web-chat, web-form, app, social networking site.



Reasons for contacting via more than one method



QF7 Why did you contact your provider to tell them you wanted to leave/cancel your service more than one method? Unprompted

Words used to describe the contact with current provider



All DNT

DNT who accepted a deal

DNT who did not accept a deal

Proportion that recalled contact with current provider when considering switching:







Words used to describe contact (of those that recalled contact)	Decided not to	Accepted a deal	Did not accept a deal
Helpful	55%	60%	28%
Informative	44%	48%	25%
Time-consuming	32%	30%	43%
Frustrating	28%	24%	46%
Reassuring	19%	20%	13%
Essential	16%	18%	8%
Unhelpful	16%	11%	40%
Unnecessary	6%	5%	14%
Don't know/don't recall	3%	2%	6%

Base: All switchers that had contact with previous provider when switching, (487), Accepted a deal (407), Did not accept a deal (80)

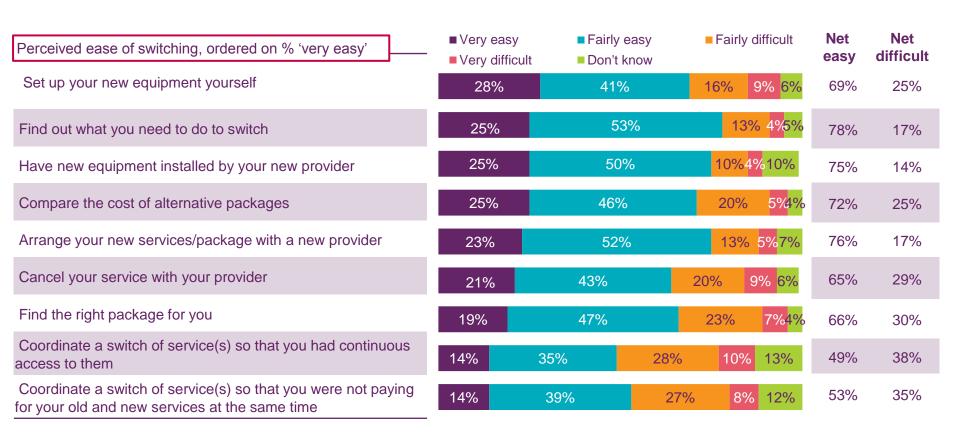
QF15 And still thinking about all the conversations you had with your provider when you were considering switching, which of the following words would you use to describe this contact? Multi-code



ATTITUDES TO SWITCHING



Perceived ease of switching (all DNT)



QG18 How easy or difficult do you think it would be to do each of the following? Base: All who considered but decided not to switch: (699)



Satisfaction with decision to stay with current provider



QG19 Overall, how satisfied are you with your decision to stay with your <INSERT RELEVANT SERVICES FROM QB1 > provider? Base: All decided not to switch (1124), All accepted a deal (466), All did not accept a deal (233)



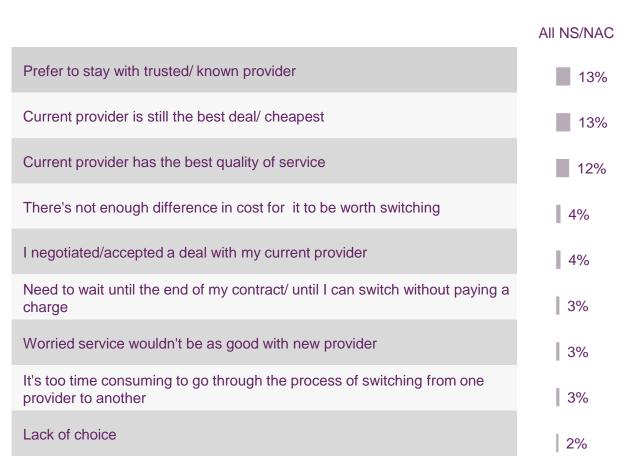
Main findings among Non-switcher/Non-Active Considerer (NS/NACs):



FACTORS IMPACTING DECISION NOT TO SWITCH OR CONSIDER SWITCHING







NS/NAC who NS/NAC who 49% did not accept a 51% accepted a deal deal 13% 13% 14% 12% 12% 3% 6% 8% n/a 5% 1% 4% 2% 3% 1% 4%

Arrow denotes sig difference between those who accepted a better deal and those who didn't Direction of difference by up or down arrow

Base: All Not switched/ Not considered (698), All Not switched/ Not considered who accepted a better deal with current provider (339), All Not switched/ Not considered who did not accept a better deal with current provider (359)



QC4AA And which, if any of these, were the main factor for not switching or actively consider switching your current provider to another provider or providers?



Why did not switch/actively consider switching (2 of 3, MAIN factors)

	All NS/NAC	NS/NAC who accepted a deal	NS/NAC who 9% did not accept a deal
Lose specific benefits or stored content, e.g. film programmes or specific channels which came with previous package	2%	3%	2%
I was worried about being without the Broadband service(s) during the switch	2%	3%	1%
Did not want to lose my phone number	1%	1%	2%
I was worried about being without the Landline phone service(s) during the switch	1%	0%	3%
Problems/ issues with current provider are not sufficiently bad/ frequent to switch	1%	1%	2%
It's difficult to compare what other providers are offering	1%	1%	1%
Concerned it would be difficult to arrange for the old and new services to start and stop at the right time	1%	2%	0%
It's too time-consuming to find a better deal	1%	0%	1%
Don't want to go through the hassle of setting up a new online account	1%	0%	1%

QC4AA And which, if any of these, were the main factor for not switching or actively consider switching your current provider to another provider or providers?

Base: All Not switched/ Not considered (698), All Not switched/ Not considered who accepted a better deal with current provider (339), All Not switched/ Not considered who did not accept a better deal with current provider (359)

Arrow denotes sig difference between those who accepted a better deal and those who didn't Direction of difference by up or down arrow



Why did not switch/actively consider switching (3 of 3, MAIN factors)

All NS/NAC

Concerned about paying two providers at the same time	1%
Too much hassle to cancel my current service	1%
Didn't want to pay the disconnection charge	1%
I was worried about being without the pay TV service(s) during the switch	1%

NS/NAC who accepted a deal	NS/NAC who did not accept a 51% deal
1%	1%
0%	1%
1%	0%
1%	0%

0 or <0.5%:

Did not want to contact current provider

Just haven't had time/ haven't got around to it yet

Having to return provider's equipment

Did not want to have to install new equipment myself

Did not want to have to get engineer in to install the new equipment/service(s)

Didn't want to contact potential new provider(s)

Don't know how to change provider/ switch

Bad experience when switching my communication services previously

Bad experience switching other service previously

Concern about other devices/products I own not working with new service(s)

Could not get permission to install new equipment where I live e.g. cables, satellite, etc.

Learning how to use a new service

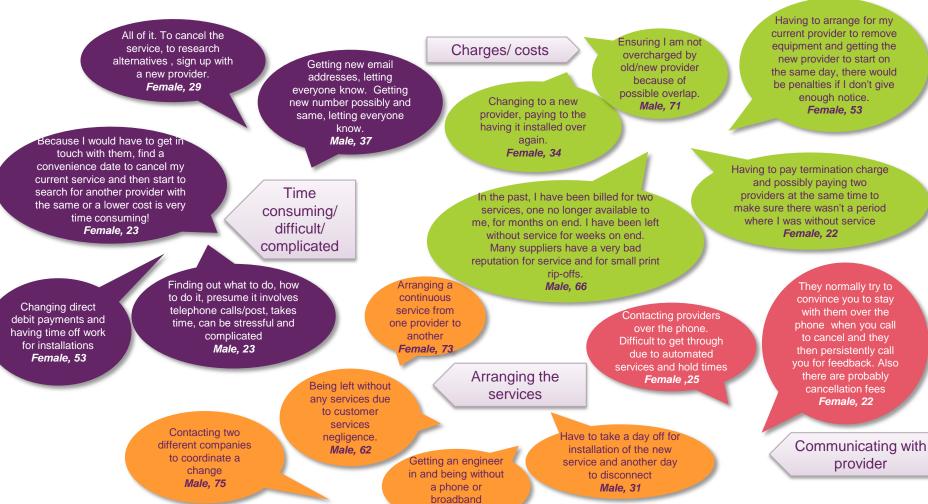
- 92% had a major factor and therefore could give a 'main' reason
- · 8% could not choose a 'main' reason
- 6% were not sure

QC4AA And which, if any of these, were the main factor for not switching or actively consider switching your current provider to another provider or providers?

Base: All Not switched/ Not considered (698), All Not switched/ Not considered who accepted a better deal with current provider (339), All Not switched/ Not considered who did not accept a better deal with current provider (359)



Reasons that it was 'too much hassle' to cancel current service



Female, 59

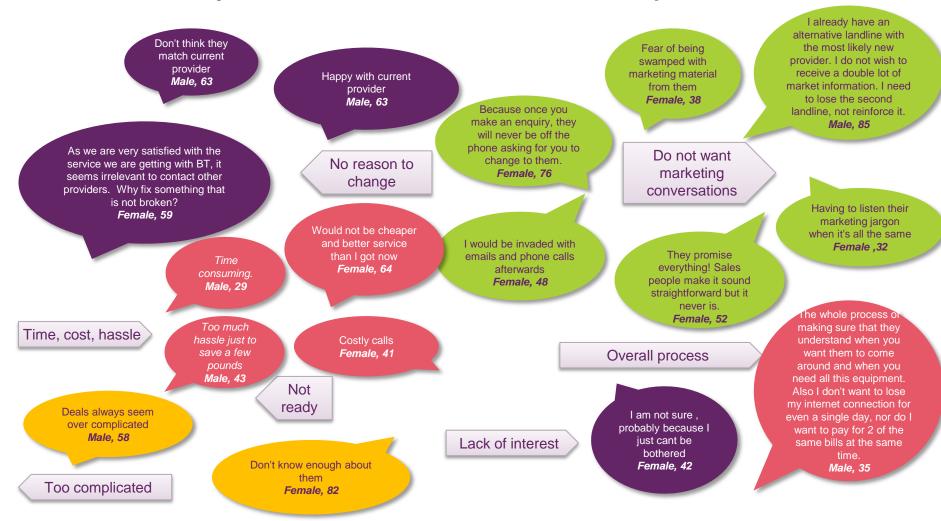
QC3AB You mentioned that difficulty contacting your current provider was a factor in deciding not to switch your services. What was it about the experience that was difficult? Unprompted



Reasons that they did not want to contact their current provider I have always been put It would feel through to an automated I don't like talking disloyal machine which makes it to call centre Being put on hold for a Female, 80 very difficult to get to talk agents long time, trying to to an actual advisor Female, 34 convince me to stay even Female, 19 Can take a long time to though my mind was set access the person you Female, 32 They have a reputation (bad) of not need Experience on Female. 64 wanting to let you go and hassle customers on the phone. One of my phone neighbours tried to leave sky and couldn't, after a year of trying and even Attempt at 'save' It is always a bit of a having her phone line cut off and then blocked from other providers, she had nightmare contacting BT Previous experiences with their to get a lawyer to deal with them. customer services are off putting, Female, 82 Female, 61 you only get to speak to the nice people after the first 2 have tried They would always to fob you off. try to renegotiate & Female, 36 make it difficult to leave Female, 42 Difficult to contact supplier due to hearing disability Male, 69 Sometimes get through to call centre, after a long wait, only to Not find I can't always understand ready what they are saying Have made contact Female, 65 I don't want the hassle before but ended up in an Indian Call Female, 22 didn't want to contact my Still looking around. Centre and didn't provider as I don't fully Male, 44 understand much of know if I want to stay with Difficulty what was being said. them or not. Male. 74 understanding Female, 21

QC3C You mentioned that you did not want to contact your current provider. What, if anything, made you not want to contact your current provider? Unprompted

Reasons that they did not want to contact their current provider



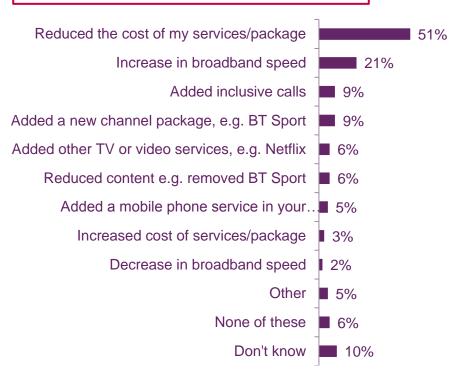
QC3D You mentioned you did not want to contact potential new providers. What, if anything made you not want to contact potential new providers? Unprompted

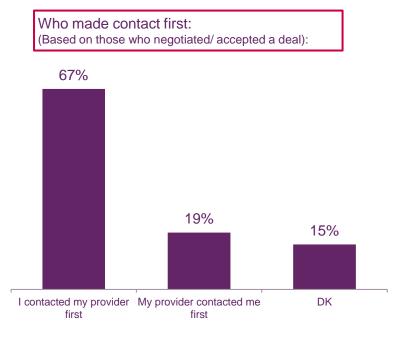
Ofcom



What was involved in the deal negotiated with current provider

What was involved in deal with current provider (Based on those who negotiated/ accepted a deal):





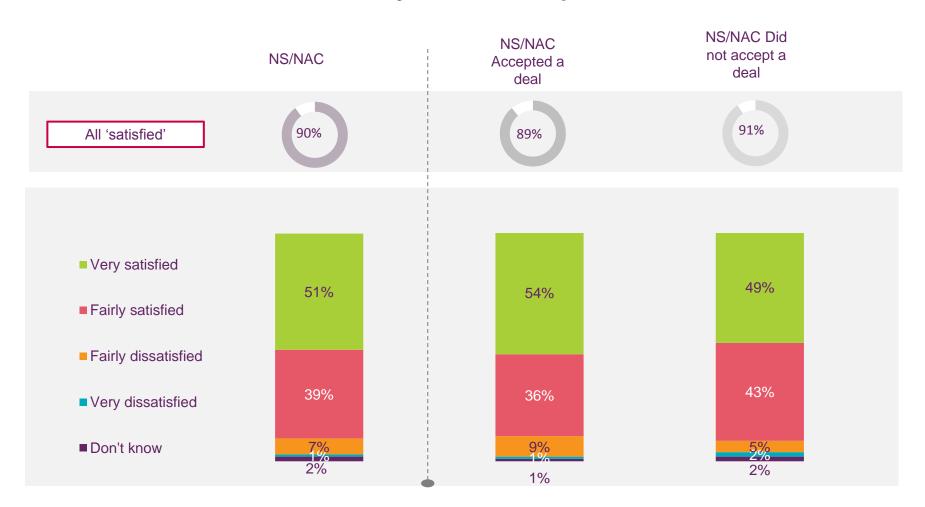
QC4AE. You mentioned you negotiated/ accepted a deal with your current provider. Which, if any of the following did this involve? Base: All NS/NAC that accepted a deal with current provider (339)



ATTITUDES TO SWITCHING



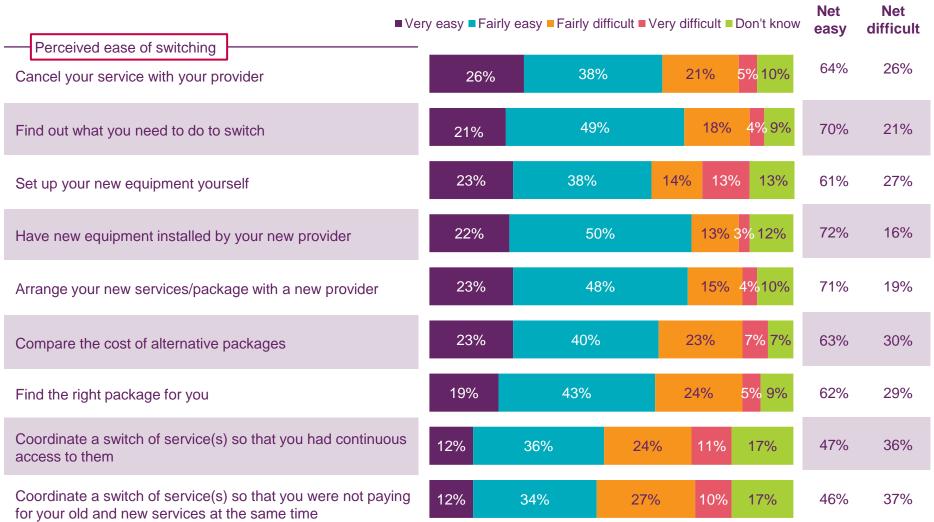
Satisfaction with decision to stay with current provider



QG19 Overall, how satisfied are you with your decision to stay with your <INSERT RELEVANT SERVICES FROM QB1 > provider? Base: All NS/NAC (698), All accepted a deal (339), All did not accept a deal (359)

Perceived ease of switching





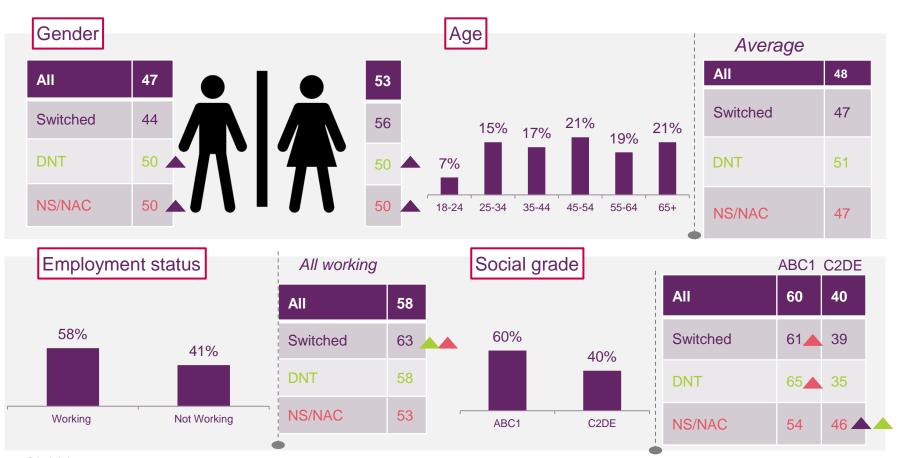
QG18 How easy or difficult do you think it would be to do each of the following? Ordered as per questionnaire. Base: All Not switched/ Not considered: (698)



Annex: Demographic and attitudinal profile of key sample groups



Demographics of key sample groups

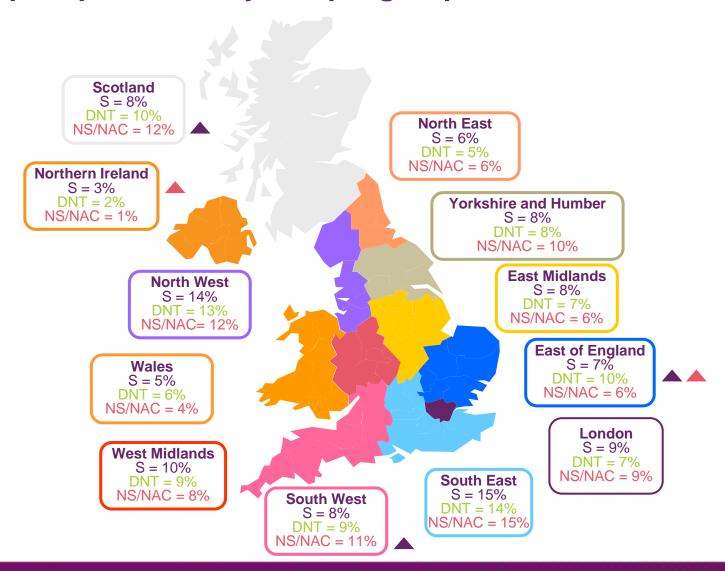


QA2/3/4/5

Base: All respondents (2529) /Total Switchers (1132) /DNT(699)/NS/NAC (698)



Geographic profile of key sample groups





Attitudes to technology



QA7: Before we ask you more about the TV, phone and broadband services you use, please look at the different statements people have made about technology services such as mobile phones, landline phones, broadband or TV services. For each statement please indicate how much you agree or disagree...

Base: All respondents (2529) /Total Switchers (1132) /DNT(699)/NS/NAC (698)

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