Landline phone and broadband

Overview

Eighty-one per cent of UK adults had a broadband service at home in 2016.[14] For many of these people the internet has a central role in home life, used for everything from grocery shopping and banking to children's homework and family entertainment. Two-thirds of households with broadband say they would "struggle to function" without it for any length of time.[15]

Eighty-four per cent of UK adults had a landline phone service at home in 2016.[16] For younger and family households, this is typically an important back-up, used when other services go down. [17] For some people who do not own a mobile phone, particularly elderly consumers, their landline may be their principal means of communicating with friends and family, and without it they would feel isolated. Twenty-seven per cent of households with a landline say they would struggle to function without it for any length of time.[18]

This section explores the service quality experienced by consumers using landline and broadband services in 2016, including:

- **Overall satisfaction** - how satisfied customers were with their service, and whether they had a reason to complain.

[14] Ofcom, *Technology Tracker H2 2016,* table 48: https://www.ofcom.org.uk/__data/assets/pdf_file/0032/93596/Ofcom-Technology-Tracker-H2-2016.pdf
[15] Jigsaw Research, *Automatic compensation: Consumer experience of provisioning delays, loss of service and missed appointments,* March 2017, p. 16: https://www.ofcom.org.uk/__data/assets/pdf_file/0026/98711/automatic-compensation-jigsaw-report.pdf
[16] *Technology Tracker H2 2016,* table 15
[17] Jigsaw Research, *Quality of service in telecoms*, *Residential consumer and SME experiences of quality of service in fixed line, broadband and mobile telecoms*, February 2016, p. 13: https://www.ofcom.org.uk/__data/assets/pdf_file/0025/78370/jigsaw_quality_of_service_in_telecoms.pdf
[18] *Quality of service in telecoms*, p. 13

- **Getting a new service** - how long it took for new services to be provided, and how often this was on time, as promised.
- **Service performance** - whether services were available and working as they should, and how quickly they were put right when something went wrong.
- **Customer service** - the experience of contacting providers and how effectively they resolved complaints.

While the focus of this section is on services marketed to households, this information will be relevant to the many small businesses that also use these or equivalent services.

Overall satisfaction and reasons to complain

While most landline and broadband customers were satisfied with their service in 2016, there were some differences between providers

In 2016, nine in ten (89%) landline phone customers reported that they were satisfied with the overall service they received; comparable with overall satisfaction in 2015 (88%).[19] BT customers reported higher than average satisfaction (92%). Ninety-one per cent reported they were satisfied with the reliability of their service, with no differences between providers.

Figure 1: Satisfaction with landline provider

	Total landline	BT	Sky	TalkTalk	Virgin Media
Satisfaction with overall service	89%	92%	90%	83%	85%
Satisfaction with reliability of service	91%	93%	91%	88%	91%

Source: Ofcom Switching Tracker, July-August 2016
*Base: All adults aged 16+ who are the decision-maker and express an opinion on landline (1716), receiving their service from BT (664), Sky (381), Virgin Media (334), TalkTalk (170). Providers used by fewer than 100 respondents are not shown individually but are included in the total. 'Don't know' responses have been excluded from the base. NB: Figures highlighted in **green**/**red** indicate a statistically significant difference compared to the total market average.*

Eighty-seven per cent of broadband customers reported that they were satisfied with their overall service, up from 83% in 2015, with 86% satisfied with reliability and 83% satisfied with the speed of their service.[20] Virgin Media customers reported higher than average satisfaction; nine in ten customers reported satisfaction with each of these three measures.

Figure 2: Satisfaction with broadband provider

	Total broadband	BT	Sky	TalkTalk	Virgin Media
Satisfaction with overall service	87%	84%	88%	83%	91%
Satisfaction with reliability of service	86%	83%	88%	83%	90%
Satisfaction with online speed	83%	80%	83%	71%	91%

Source: Ofcom Switching Tracker, July to August 2016
*Base: All adults aged 16+ who are the decision-maker and express an opinion on fixed broadband (1527), receiving their service from Sky (416), BT (402), Virgin Media (357), TalkTalk (170). Providers used by fewer than 100 respondents are not shown individually but are included in the total. 'Don't know' responses have been excluded from the base. NB: Figures highlighted in **green**/**red** indicate a statistically significant difference compared to the total market average.*

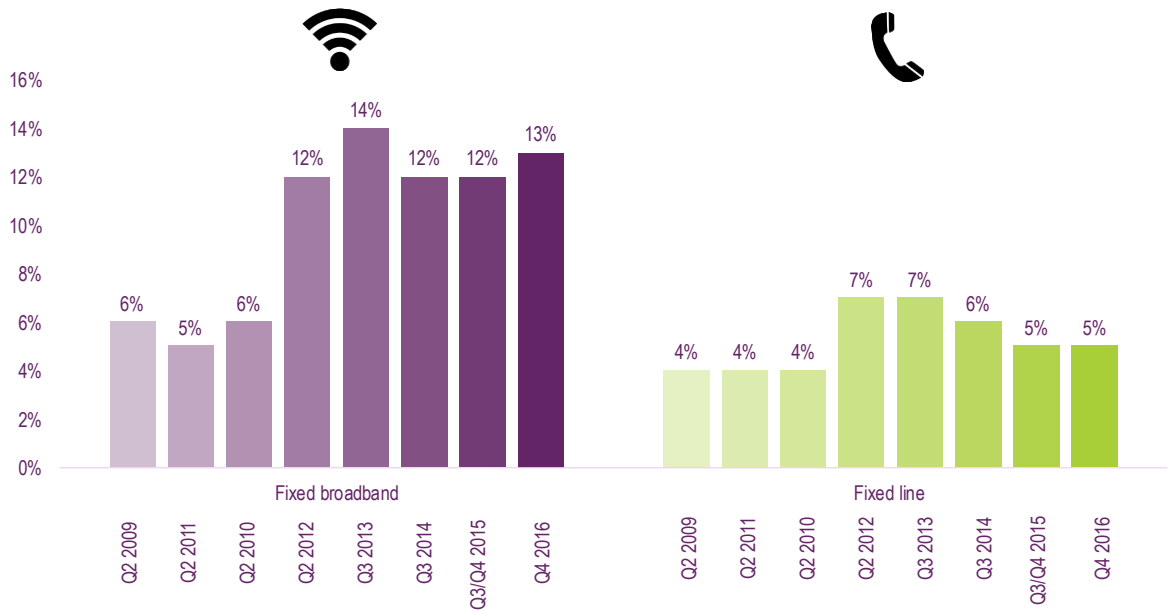
[19] Ofcom, *Switching Tracker 2016*, table 41: https://www.ofcom.org.uk/__data/assets/pdf_file/0025/95524/Switching-Tracker-2016-Data-tables.pdf
[20] *Switching Tracker 2016,* tables 257-261 and 265-271

Rural customers were more likely to be dissatisfied with the reliability of their broadband service; 11% were dissatisfied compared to 8% in urban areas.[21]

Around one in eight broadband customers had reason to complain about their service in 2016

Thirteen per cent of broadband, and 5% of landline customers, reported that they had a reason to complain about their provider in the last 12 months (both unchanged since 2015).[22]

Figure 3: Proportion of broadband and landline consumers who had a reason to complain in the last 12 months (whether or not they went on to complain)



Source: Ofcom Quality of customer service research, face-to-face omnibus survey, fieldwork carried out by Kantar Media, December 2016. Ofcom research, omnibus survey, fieldwork carried out by Saville Rossiter-Base in August, September and November 2015. Base: All UK households 16+ (n 2016: broadband = 5368, fixed-line = 5391. n 2015: broadband = 2669, landline = 2925). Q. Have you personally had a reason to complain about any of these services or suppliers in the last 12 months, whether or not you went on to make a complaint? There was no significant change between 2015 and 2016.

Broadband customers with TalkTalk and Virgin Media were more likely than broadband customers overall to have reason to complain in the last 12 months (16% vs. 13%).

Plusnet broadband customers were less likely than broadband customers overall to have had reason to complain in the last 12 months (8% vs. 13%).

[21] *Switching Tracker 2016,* table 266

[22] Ofcom, *Reasons to complain research,* April 2017, https://www.ofcom.org.uk/__data/assets/pdf_file/0016/100609/reason-complain-research-2016.pdf Fieldwork was conducted in December 2016, therefore reasons to complain date back to December 2015.

Figure 4: Proportion of broadband consumers with a reason to complain in the last 12 months (whether or not they went on to complain), by provider

	Total broadband	BT	EE/ Orange	Sky	Talk Talk	Virgin Media	Plusnet
Reason to complain in the last 12 months	13%	13%	12%	12%	16%	16%	8%

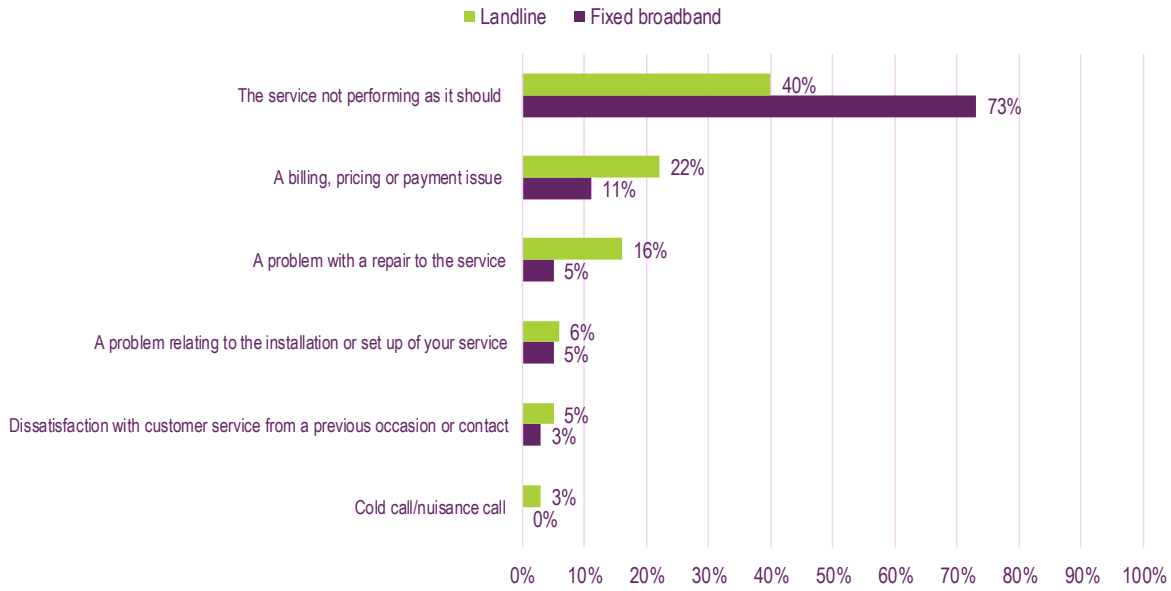
Source: Ofcom Quality of customer service research, face-to-face omnibus survey, fieldwork carried out by Kantar Media, December 2016
Base: All UK households using broadband 16+ (5368), BT (1330), EE/ Orange (241), Sky (1271), TalkTalk (624), Virgin Media (1261), Plus Net (173).Q. Have you personally had a reason to complain about any of these services or suppliers in the last 12 months, whether or not you went on to make a complaint?
***Red** or **green** text indicates figures are significantly higher than those for broadband consumers overall.*

Whether having a reason to complain influences a customer's overall satisfaction with their service may depend on how long the issue lasted, and how effectively the provider dealt with it if the customer reported it to them. We examine how satisfied consumers were with complaints handling on page 53.

The most common reason people had to complain about their broadband service was that it was not performing as it should

Of those with a reason to complain about their broadband service, around three-quarters (73%) reported that it was because the service was not performing as it should (for example, because of a complete or intermittent loss of service, slow broadband speeds, or the service not performing as advertised). Among landline consumers, 40% of those with a reason to complain reported that their service was not performing as it should.

Figure 5: Reasons to complain about broadband or landline phone service (whether or not they went on to complain)



Source: Ofcom Quality of customer service research, face-to-face omnibus survey, fieldwork carried out by Kantar Media, December 2016. Base: All who had a reason to complain about their landline phone (263), all who had a reason to complain about fixed broadband provider (722). Q. What was the most recent issue you had reason to complain about in connection with your home landline / fixed broadband?

Landline and broadband: getting a new service

Consumers first experience their provider's service quality when they place an order for a new service.[23] People value clear and accurate advice about what is available and how it will meet their needs. Once they decide to place an order, flexibility in scheduling an installation is also valued. It is then important that the service is provided on time, as agreed, and delays are managed effectively. We report on the differences in providers' customer service more widely from page 46 onwards.

It took over two weeks, on average, for a new service to be provided in 2016, but consumers appear to expect much faster installations

Our research indicates that on average, consumers consider 8 calendar days an acceptable time for a new broadband service to be activated, 6 days for a landline service and 11 days for a landline and broadband service.[24] However, in 2016, across the providers we are reporting on, it took on average 13 calendar days to provide a new standalone broadband service, and 16 calendar days to provide a standalone landline service or a landline and broadband service.[25]

There are several reasons why new services may take this long, or longer, to provide:

- **Rules on service migrations (i.e. switches):** where a consumer switches landline and/or broadband services between providers within the Openreach or KCOM networks, Ofcom rules require that this takes a minimum of ten working days. This allows time for the switch to be stopped if, for instance, the consumer has not agreed to it, or they have changed their mind.[26] In 2016, orders subject to this rule accounted for around 30% of those made to the providers on the Openreach network we have reported on.

  These rules do not apply to switches to or from other networks, for example, Virgin Media cable or smaller alternative network providers, or to fibre-to-the-premises connections.

- **Customer choice**: Not all consumers will want their new service to start as soon as possible. Some may be waiting for the contract for their existing service to expire, while others who are moving home may want their new service to start on the date they move in. The average times to provide new services will reflect these cases.

[23] *Quality of service in telecoms*, p. 25
[24] *Automatic compensation: Consumer experience of provisioning delays, loss of service and missed appointments*, pp. 22-24
[25] Ofcom analysis of provider data (includes providers on the Openreach network, Virgin Media and KCOM).
[26] Ofcom, *Consumer Switching, A statement and consultation on the processes for switching fixed voice and broadband providers on the Openreach copper network,* August 2013 https://www.ofcom.org.uk/__data/assets/pdf_file/0033/76569/consumer_switching.pdf

- **Customer circumstances and the service ordered**: The time taken to provide a new service also depends on the nature of the installation required. The service requested, and any service the customer already receives at their home, can affect the type of work that is needed to provide a new service. Orders requiring an engineer visit to the home typically take longer, as they require an available appointment slot that works for the customer. Around a third (30-40%) of installations by Openreach involve an engineer visit.[27]

Figure 6 shows how the average time to provide a new service can vary based on the customer's circumstances and the specific service ordered. For example, transfers of active lines on the Openreach network are completed within an average of 17 calendar days; this is effectively three calendar days longer than the minimum period of 10 working days.

Figure 6: Time to provide a new landline or broadband service, by type of order (providers on Openreach network)[28]

Order type	Percentage of all providers' orders	Average time to provide (calendar days)
New line – where a new line must be connected to the home for the service to be provided.	32%	18
Restart – where an old line running into the home is reactivated to provide the new service.	18%	11
Transfer – where an active line is transferred from the customer's current provider to their new provider. *	23%	17
Home move – where the customer is moving home and wishes to takeover an active line at their new premises while remaining with their current provider.*	7%	17
Product change – where a customer wishes to stay with their provider but change their current service, for example by upgrading to a faster broadband speed.	14%	15

*Source: Ofcom analysis of provider data. * indicates ten-working-day minimum switching rule applies*[29]

[27] Ofcom, *Quality of Service for WLR, MPF and GEA, Consultation on proposed quality of services remedies*, March 2017, p. 163, figure A6.4: https://www.ofcom.org.uk/__data/assets/pdf_file/0033/99645/QoS-WLR-MPF-GEA.pdf,

[28] Providers included in this analysis are BT, Plusnet, Post Office, Sky and TalkTalk. Around 6% of orders were not classified or did not fit into the categories specified above. More information on how Ofcom derived this and other information from provider data can be found at annex 1.

[29] Under General Condition 22.

Figure 7 shows the time taken for Virgin Media to provide new services on its network. 'Quickstart' orders, which can be installed by customers themselves, typically take less than half the time of orders requiring an engineer visit.

Figure 7: Time to provide a new landline or broadband service, by type of order (Virgin Media)

Order type	Percentage of orders	Average time to provide (calendar days)
'Quickstart' self-install – where the home has an existing Virgin Media line and the customer can complete the installation themselves	55%	6
Engineer install - where an engineer is required to install a new Virgin Media line into the home or repair an existing Virgin Media connection	45%	18

Source: Ofcom analysis of provider data. Ten-working-day minimum switching rule does not apply to Virgin Media orders.

The time taken to complete an order for a new service may also depend on where the customer lives. On average, orders in rural areas took an additional day to be completed in 2016.[30]

A provider's own processes may also affect the time it takes for a service to be provided. Figure 8 shows how the time taken to complete orders for new landline and broadband services varied by provider on the Openreach network in 2016, in both urban and rural areas.[31] Sky completed the highest proportion of orders placed in urban areas within one week (20%) and two weeks (59%), while TalkTalk completed the smallest proportion in one week (5%) and two weeks (47%).[32]

[30] Ofcom analysis of provider data.
[31] Ofcom analysis of provider data. Urban and rural postcodes identified using the locale classification: http://www.bluewavegeographics.com/images/LOCALE_Classification.pdf. See annex 1 for further details.
[32] Differences in provider performance may in part be the result of different customer circumstances. However, there are also indications that some providers on the Openreach network can provide the same type of order significantly faster than others. We intend to explore this further in future reports.

Figure 8: Percentage of new landline and broadband services in urban areas provided within one, two, three and four weeks of the order date (providers on Openreach network)[33]

Provider	One week	Two weeks	Three weeks	Four weeks
BT	13%	51%	84%	93%
Sky	20%	59%	89%	95%
TalkTalk	5%	47%	87%	94%

Source: Ofcom analysis of provider data

Virgin Media, to whom the ten-working-day transfer rules do not apply, completed 53% of orders in urban areas within one week and 74% within two weeks.[34]

Figure 9: Percentage of new landline and broadband services in urban areas provided within one, two, three and four weeks of the order date (Virgin Media)[35]

Provider	One week	Two weeks	Three weeks	Four weeks
Virgin Media	53%	74%	86%	92%

Source: Ofcom analysis of provider data

KCOM completed 13% of orders placed in the (mostly urban) Hull and East Yorkshire areas it serves within one week, and 80% within two weeks.

Figure 10: Percentage of new landline and broadband services in Hull and East Yorkshire provided within one, two, three and four weeks of the order date (KCOM)

Provider	One week	Two weeks	Three weeks	Four weeks
KCOM	13%	80%	90%	95%

Source: Ofcom analysis of provider data

In rural areas, Sky and BT completed the highest proportion of orders within one week (13%) and Sky completed the highest proportion of orders within two weeks (52%). TalkTalk completed the smallest proportion of orders in rural areas in one week (4%) and two weeks (41%). Virgin Media's network is available in relatively few rural areas so we have not reported on its time to provide in these areas.

[33] Ofcom analysis of provider data. The time taken to provide a new service is calculated by taking the difference between the date the order was logged and the date that billing for the service began. More detail on our methodology is available in annex 1. Plusnet, EE and the Post Office were unable to provide data in line with our requirements and have been excluded from this analysis.

[34] Virgin Media indicated that the date billing starts may not always be the most appropriate proxy for when its services are made available to its customers, and therefore provided alternative information for this analysis, based on either the date an engineer reported the service was made available, or the estimated arrival date of self-start routers.

[35] Ofcom analysis of provider data.

Figure 11: Percentage of new landline and broadband services in rural areas provided within one, two, three and four weeks of the order date (providers on Openreach network)

Provider	One week	Two weeks	Three weeks	Four weeks
BT	13%	50%	80%	91%
Sky	13%	52%	87%	94%
TalkTalk	4%	41%	85%	93%

Source: Ofcom analysis of provider data

Very long installation times may cause frustration and inconvenience for consumers, even if their expectations have been managed by their provider. In 2016, 6% of orders took more than 30 days to be completed and 1% of orders took more than 60 days.[36] Sometimes long installation times are due to factors outside providers' control; for example, where permission to conduct street works is required, or 'wayleaves' need to be agreed to install equipment on private land.

More than one in ten landline phone and broadband orders are not completed on the date agreed with the customer

Unexpected delays in providing a new service can cause serious inconvenience and harm.[37] People may have to spend time rearranging the installation, and wait in again if an engineer visit is required. Consumers may also be left without a service entirely if their old service has been switched off.

In analysis for our automatic compensation consultation, we found that 12% of orders for landline and/or broadband services are subject to delays.[38] Ofcom is consulting on requiring providers to automatically compensate consumers when a provider promises to deliver a service on a specific date and fails to do so. Under the provisional proposals, consumers would be compensated if their provider missed the date they had originally promised in writing, regardless of whether consumers had been given notice in advance of the delay.[39]

For this report, we had intended to publish a provider comparison of orders completed on time. However, due to differences between some providers in how the date agreed with the customer is recorded, we are not confident that the data we have obtained is sufficiently comparable to enable us to publish a breakdown for each provider.

We also asked providers to indicate how often, for orders in 2016, they rearranged the date agreed with their customers. Several providers were unable to supply this information and this has limited

[36] Ofcom analysis of provider data.
[37] *Quality of service in telecoms*, p. 25
[38] Ofcom, *Automatic Compensation, Protecting consumers from quality of service problems*, March 2017, p. 46: https://www.ofcom.org.uk/__data/assets/pdf_file/0030/98706/automatic-compensation-consultation.pdf
[39] *Automatic Compensation, Protecting consumers from quality of service problems*, p. 24

our ability to make a fully informed assessment of performance. We consider that this data should be captured and tracked as a measure of customer experience, and we will consider what action may be required to ensure this information is recorded and available for future reports.

Openreach has an important role in ensuring new services are provided on time

With the exception of Virgin Media and KCOM, the UK's largest communications providers rely on Openreach to install connections. Since 2014, Openreach has been subject to minimum standards in relation to how many installations it completes on time, and when it offers appointments for engineer visits.[40] It is also required to publish information on its performance in these areas.[41]

Openreach has complied with the minimum standard of 90% on-time installations for landline and standard broadband services over the past three years. But it has not consistently performed much better than the minimum, despite a 2015 commitment to do so.[42] Ofcom is therefore consulting on proposals to raise the minimum to 95% for on-time installations, and to include superfast broadband within this standard.[43]

In 2014 Ofcom required Openreach to increase the proportion of engineer appointments it offers within 12 working days from 42% in 2012 to 80% by 2017, for landline and standard broadband installations. It has exceeded this minimum, making appointments available within 12 working days for more than 90% of relevant orders requiring an engineer visit in 2014/14 and 2015/16.[44] We believe Openreach can sustain a high level of performance, and are proposing to increase the minimum requirement to 90%, including superfast broadband installations, and to reduce the required lead time from 12 to 10 working days.[45]

We believe these proposals will reduce delays and give providers on Openreach's network more certainty about when an installation will take place.

Missed installation appointments can also cause delays and harm

When a customer waits in for an installation but no one arrives in the agreed slot to provide it, not only will the customer not get the new service as expected but they may suffer from wasted time waiting in and having to reschedule. Ofcom is consulting on provisional proposals to require

[40] This standard applies to the installation of full copper (ADSL) connections, but not fibre connections (fibre to the cabinet/premises).
[41] Available at https://www.homeandwork.openreach.co.uk/OurResponsibilities/our-performance.aspx
[42] *Quality of Service for WLR, MPF and GEA*, p. 75
[43] *Quality of Service for WLR, MPF and GEA,* section 6
[44] *Quality of Service for WLR, MPF and GEA,* p. 80
[45] *Quality of Service for WLR, MPF and GEA,* pp. 88-91

providers to compensate consumers if an appointment is missed or cancelled with less than 24 hours' notice.[46]

In relation to the residential customers of the retail providers we are reporting on here, Openreach missed 3.6% of installation appointments during the year.[47] It significantly reduced the proportion of installation appointments its engineers missed over the course of 2016; from 6% in January to 2.2% in December.[48] When an Openreach engineer does not arrive during the originally agreed slot or before the agreed slot with the agreement of the customer, the appointment is recorded as 'missed' by Openreach even if it is carried out later the same day.

In 2016, 0.6% of Virgin Media installation appointments did not take place on the date agreed with the customer.[49] Virgin Media has indicated that its engineers call the customer in advance of an appointment that day, and if the engineer is running early or late, they will try to arrange an alternative time on the same day to complete the work. Where the appointment is agreed to take place earlier or later that same day (and attended) Virgin Media does not class the appointment as 'missed'. In the final quarter of 2016, for 20% of installation appointments Virgin Media engineers arrived either more than one hour before the slot originally agreed with the customer, or sometime after the agreed slot.[50]

[46] *Automatic Compensation, Protecting consumers from quality of service problems*, section 7
[47] Ofcom analysis of retail provider data.
[48] In relation to the residential customers of the retail providers we're reporting on. Ofcom analysis of retail provider data.
[49] Ofcom analysis of Virgin Media data.
[50] Virgin Media data.

Landline and broadband: service performance

A reliable connection is essential to get the most from landline and broadband

A reliable connection is a key requirement for broadband and landline customers. Our qualitative research[51] indicates there are two important aspects to this:

- **Day-to-day performance** - broadband users say they expect their connection to meet the speed promised to them when they bought the service, and to be fast enough to cope with the activities they and their household want to perform online. Landline phone users expect a clear line and no echo.

- **Service availability and fault repair**- people say that they expect their broadband to be 'always on' and will tolerate only very occasional periods of down-time. When things go wrong, they expect their providers to repair the service as quickly as possible. The same applies to landline phones, particularly for those people who are dependent on it, for example if they do not have a mobile phone.

The biggest driver of reasons to complain about broadband and landline services is failure to meet these expectations.[52] Despite this, only around one-third of customers consider broadband speeds (35%) and reliability (30%) when choosing their broadband provider; price is often the most important factor (62%).[53] Reliability is a factor in choice of landline provider for 24% of people.

Day-to-day performance

The broadband speeds a household experiences depend on the product chosen, the location and how the household uses the service

Download speeds - and how they vary throughout the day – are a key factor in determining the quality of consumers' experience when they use the internet. Data-intensive activities such as video streaming are becoming more popular and, with the growth in internet-enabled devices, it is common for a household to have multiple users connected to the internet at the same time. If speeds are not adequate, consumers will find these activities slow or even impossible to carry out.

Our 2016 *Connected Nations* report highlighted that as people move from standard to superfast speeds, the amount of data they use grows. In particular, the relatively low data consumption on

[51] *Quality of service in telecoms*, p. 18
[52] See Figure 5
[53] *Automatic compensation: Consumer experience of provisioning delays, loss of service and missed appointments*, p. 18

connections with an average download speed below 10Mbit/s suggests that people with these connections may be constrained in what they can do with their service.

The speeds available over ADSL standard broadband and fibre-to-the-cabinet superfast broadband depend on the length and quality of the copper phone wire going from the telephone exchange or cabinet to the customer's house. Ofcom's broadband checker can be used to view the availability and highest predicted speeds of services at an address.

Average broadband speeds are increasing year on year, but many with standard broadband may be getting speeds that are too slow for their day-to-day activities

Ofcom's measurement of home broadband performance

Ofcom, in conjunction with its research partner SamKnows, researches the performance of fixed broadband services using a panel of volunteers who connect a measurement unit to their broadband router. The research tests a number of aspects of the service provided to consumers, including: recording the download and upload speeds on a regular basis, and any disconnections from the service. We also report on the level of quality for internet video services (this year in relation to Netflix).

The volunteers are customers of all the major, and many smaller, broadband providers across a range of services, and the panel is compiled to ensure that it is representative of UK broadband customers overall.

Our latest report on home broadband performance is published alongside this report.[54] It shows that average UK residential broadband speeds were 36.2Mbit/s in November 2016, up from 28.9Mbit/s in 2015. This has largely been due to an increasing proportion of people buying 'superfast' (above 30Mbit/s) broadband services; either fibre-to-the-cabinet (FTTC) products such as BT Infinity, Sky Fibre or TalkTalk Fibre Broadband, or Virgin Media's cable products. However, while superfast broadband is available at 89% of premises[55], only around 49% of households with a broadband service have a superfast product.[56]

Many customers are still using 'standard' broadband based on a copper line from the home to the street cabinet and then to the telephone exchange. While speeds of standard broadband services have increased, on average they are still lower than 10Mbit/s. Ofcom consumer research in late

[54] Ofcom, *UK Home Broadband Performance report 2016*, April 2016: https://www.ofcom.org.uk/research-and-data/broadband-research/uk-home-broadband-performance-2016
[55] Ofcom, *Connected Nations 2016*, December 2016, p. 4: https://www.ofcom.org.uk/__data/assets/pdf_file/0035/95876/CN-Report-2016.pdf
[56] *UK Home Broadband Performance report 2016*

2015 found that 14% of standard broadband users felt that the speed of their connection was often too slow to meet their needs, compared to 6% of superfast users.[57] For many on standard broadband products, the only way to significantly improve their experience is to upgrade to a superfast connection, if available in their area.

People in rural areas tend to experience slower speeds than those in urban areas. This is in part because of longer distances between local exchanges, street cabinets and people's homes, requiring longer copper lines over which speeds will reduce. Superfast connections are also not available in some rural areas due to slower roll-out of fibre-to-the-cabinet infrastructure and low cable broadband availability. However, gradual deployment of superfast products into rural areas, for example under the Broadband UK rural roll-out programme, is delivering improvements in the speeds available.[58]

Figure 12: Average actual urban and rural broadband download speeds across the day and at peak times (Mbit/s)

	Urban Standard (ADSL)	Rural Standard (ADSL)	Urban Superfast (FTTC)	Rural Superfast (FTTC)
24-hour	10.3	6.3	44.6	39.2
8pm to 10pm	10.1	6.2	44.0	38.9

Source: Home Broadband Performance report 2016.

Most consumers experience variation in their broadband speed across the day

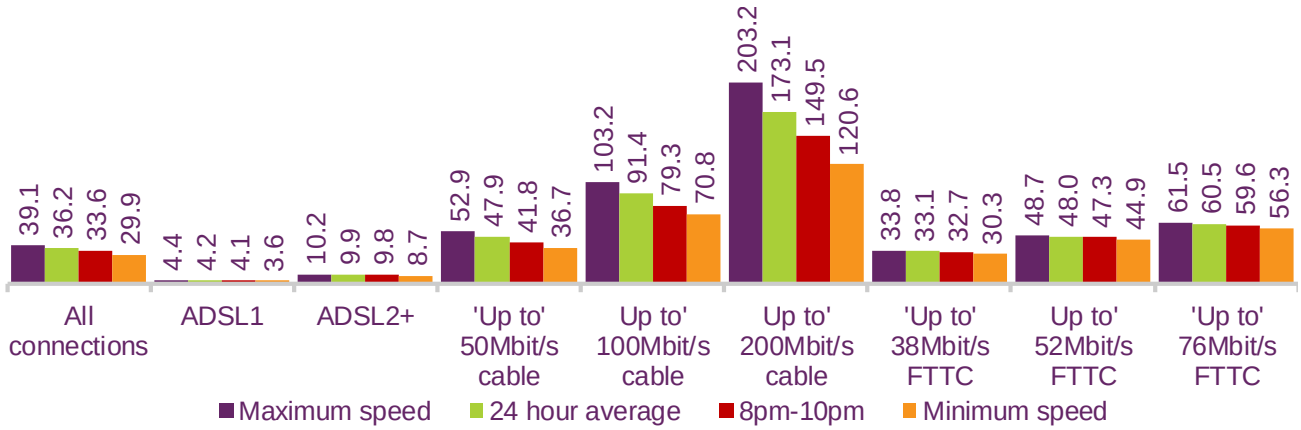
Our research indicates that broadband speeds vary throughout the day, with speeds often falling during peak hours, when more people on the network are using their broadband at the same time. The extent to which a consumer's speed varies, and when it varies, can affect their ability to use the service as they expected. Our research recorded the maximum, the minimum, and the average speeds received by panellists over a 24-hour period, and in the peak period of 8pm to 10pm during November 2016.

The variation was greatest for cable products, particularly the fastest 200Mbit/s service, where the average peak-time speed was 14% lower than the average speed throughout the day. However, the average peak-time speeds experienced for Virgin Media's 100Mbit/s and 200Mbit/s are still relatively high (80Mbit/s for 100Mbit/s cable and 150Mbit/s for 200Mbit/s cable) and, depending on

[57] Ofcom, *Residential and SME broadband research*, March 2016, p. 20: https://www.ofcom.org.uk/__data/assets/pdf_file/0031/99643/Broadband-residential-research.pdf
[58] https://www.gov.uk/guidance/broadband-delivery-uk

how they use their service, customers receiving these speeds may not notice the variation in performance.

Figure 13: Average download speeds, by technology, throughout the day



Source: UK Home Broadband Performance report 2016

A minority of cable customers suffer large drops in speed during peak evening periods

Slowdowns in peak periods do not affect all customers equally. For example, while many of Virgin Media's customers received consistently high speeds (47% of 'up to' 50Mbit/s cable panellists had an 8-10pm peak-time average speed of 50Mbit/s or higher), some customers experienced severely degraded speeds in peak times. Figure 14 below shows that 9% of those with a 50Mbit/s cable connection received an average peak-time speed of less than 10Mbit/s, as did 6% with a 100Mbit/s cable connection. It was rare for the average peak time speed of any fibre-to-the-cabinet connection to consistently drop below 10Mbit/s.

Figure 14: Percentage of broadband users receiving an average peak-time (8pm to 10pm) download speed below 20Mbit/s, by product type

	Less than 10 Mbit/s	10-15 Mbit/s	15-20 Mbit/s
All ADSL	57%	25%	17%
38 Mbit/s fibre to the cabinet	0%	3%	6%
52 Mbit/s fibre to the cabinet	0%	0%	0%
76 Mbit/s fibre to the cabinet	0%	0%	0%
50 Mbit/s cable	9%	2%	0%
100 Mbit/s cable	6%	1%	3%
200 Mbit/s cable	0%	0%	0%

Source: UK Home Broadband Performance report 2016

Greater variation in speeds for Virgin Media cable connections is in part a consequence of the structure of the cable network: users share the bandwidth between the home and Virgin Media's 'cable head end' (the equivalent of an Openreach exchange). Services using the Openreach network have a dedicated connection between the home and the cabinet (for fibre-to-the-cabinet) or exchange (for ADSL), although contention in providers' backhaul and core networks (i.e. between the local exchange and the connections to the wider internet) can reduce speeds during busy times.

Superfast broadband connections are less likely than standard broadband connections to disconnect

Another potential cause of inconvenience and frustration is when a broadband service unexpectedly disconnects for short periods of time. Our research, which runs approximately 5,200 tests throughout the day, found that in November 2016, standard broadband disconnected for 30 seconds or longer on average around once a day (1.1 disconnections per day), compared to an average of just under once every three days (0.3 per day) across superfast services.[59]

The voluntary *Code of Practice on Broadband Speeds* seeks to protect consumers who receive slower than expected speeds

All of the large providers are signatories to Ofcom's voluntary Code of Practice on Broadband Speeds, which requires that customers are given an estimate of the speed of broadband that will be provided, and that customers have the right to exit their contract, penalty-free, if speeds fall below the minimum speed provided. We are looking to update the Code so that estimates and minimum speeds are based on peak-time performance (i.e. 8-10pm), and it is made clearer to customers when they have the right to exit a contract. We expect to consult on an updated Code later in 2017, when we will also publish the results of mystery shopping against the current Code.

The actual speed experienced can also be affected by how a consumer sets up and uses their broadband service. Practical tips to help consumers improve their speeds within the home are available on Ofcom's website. Ofcom's broadband and mobile checker app enables consumers to run tests to check how well their Wi-Fi is performing and get tips on how performance can be improved.

Service availability and fault repair

When a consumer's broadband or landline service becomes unavailable, it can be a cause of serious harm

While short disconnections can be frustrating, longer outages can be harmful. Our research has found that within the last two years, around a quarter (24%) of landline and broadband customers

[59] *UK Home Broadband Performance report 2016*

experienced a complete loss of service for more than an hour. Of these, 42% said it had a negative impact on their day-to-day activities and 36% said it caused them stress and anxiety.[60]

Sometimes customers lose their service because of a problem originating in the home. Common in-home issues include the Wi-Fi router being incorrectly set up, microfilters not being used properly, or the re-use of old routers for new services.[61] Customers may also be unable to connect because of a problem with the device they are using or the content they are trying to access.

For these types of service problem, effective first-line customer service may be able to help resolve the problem quickly and with minimal hassle. We discuss providers' customer service on page 46 below. Providers may also be able to reduce the frequency of some of these problems by supplying effective information to customers when they provide a new service, for example on the correct set-up and location of the Wi-Fi router.

In our consultation on wholesale quality of service, we identified that a significant proportion of faults reported to telecoms providers on Openreach's network can be cleared by the provider without referral to Openreach.[62] This suggests that many of the problems experienced by consumers whose services are supplied over Openreach's network arise in the home.

When service problems originate outside the home, on the customer's line or the wider network, an engineer will usually be needed to address the fault. How often these network faults affect an individual customer may depend on the broadband product used, their location, and how the provider (or the provider's network operator) manages the network.

For customers of providers on the Openreach network, we estimate that these faults occur approximately once every 9 years for lines carrying standard broadband services, once every 12 years for landline-only services, and once every 6 to 7 years for lines carrying superfast broadband services.[63]

We obtained information for this report with a view to publishing a comparison of service problems originating on the network, including between providers on the Openreach network and those using alternative networks such as Virgin Media. However, we are not satisfied that the data we have

[60] *Automatic compensation: Consumer experience of provisioning delays, loss of service and missed appointments*, p. 38
[61] Information supplied to Ofcom by providers.
[62] Ofcom analysis of the data of three providers using the Openreach network. The percentage of faults cleared by the provider ranged from 20% to 79% depending on provider and the product type. *Quality of Service for WLR, MPF and GEA,* p. 35
[63] *Quality of Service for WLR, MPF and GEA*, p. 37

obtained is sufficiently comparable to enable us to publish provider-specific performance for this report. This is something we intend to report on in future.

The longer it takes to repair a service, the greater the potential harm to the customer

While consumers might tolerate short outages, if a loss of service becomes drawn out, problems accumulate.[64] Our consumer research indicates that for those affected by a loss of service in the last two years, in most cases (65%) service was restored two calendar days after the provider had been notified of the issue. A further 4% of respondents had their service restored on the third day, while 23% of households had to wait more than three days.[65]

While 76% of those who reported the loss to their provider and had their service restored within a day were satisfied with their provider's response, only 34% were satisfied when it took two days or longer, falling to 13% for repairs that took longer than three days.[66]

The time taken to restore service will depend on how long it takes to diagnose the nature of the fault (for example, whether it is in the home or on the network), the speed at which an engineer is dispatched by the provider or their supplier, if one is required, and the nature of the problem.

When an engineer is sent to address a network fault, they are usually able to find and fix the problem but sometimes this may not be possible.[67] This can be because the problem actually lies in the home or somewhere outside the responsibility of the engineer to fix, or because the cause cannot be identified, which means that further investigation may be necessary causing a delay.

The time taken to fix a fault can also depend on where the customer lives. Repairs in rural areas can take more time because, for example, longer lines to the cabinet or telephone exchange may mean faults are harder to locate.[68]

There is currently little information available to consumers about repair times. Most providers do not specify a guaranteed or target time in their contracts for residential broadband and landline

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[64] *Quality of service in telecoms*, p. 3

[65] The remaining respondents (7%) could not recall or did not know how long it took to restore their service. *Automatic compensation: Consumer experience of provisioning delays, loss of service and missed appointments*, p. 34, question F5

[66] *Automatic compensation: Consumer experience of provisioning delays, loss of service and missed appointments*, p. 36

[67] Our analysis of provider data suggests a fault is not found on investigation by the engineer on around 20% of occasions.

[68] Our analysis of provider data indicates that faults in rural areas can take around 20% longer to fix compared to those in urban areas.

services.[69] We consider that it would be useful to publish a comparison of the actual time taken to repair services, by provider; however, as above, we are not satisfied that the data we have obtained on this occasion is sufficiently comparable to enable us to publish provider-specific performance.

Given the potential inconvenience and harm caused by a drawn-out loss of service, Ofcom is consulting on requiring providers to automatically compensate consumers whose service is not restored within two working days. Under our provisional proposals, consumers would receive £10 for each calendar day that the service is not restored after two working days has passed.[70]

Repair times for services using the Openreach network will be affected by the service maintenance level a retail provider buys from Openreach

All the largest broadband and landline providers in the UK, apart from Virgin Media and KCOM, rely on Openreach engineers to investigate and address faults with their customers' connections. When a provider notifies Openreach of a fault on Openreach's network, Openreach must repair it within an agreed time, depending on which service maintenance level (SML) has been purchased, or pay the provider compensation.[71] The SMLs available range from resolution within two working days to within six hours.

Figure 15: Openreach service maintenance level (SML) repair times[72]

Service level	Contractually agreed repair time
Level 1	Fault clear by 23.59 day after next, Monday to Friday, excluding public and bank holidays.
Level 2	Faults clear by 23.59 next day, Monday to Saturday, excluding public and bank holidays
Level 3	Report by 13.00, fault clear by 23.59 same day. Report after 13.00, fault clear by 12.59 next day, seven days a week, including public and bank holidays.
Level 4	Fault clear within six hours, any time of day, any day of the year.

Source: Openreach

[69] Ofcom internal analysis of standard provider contractual terms, November 2016.
[70] *Automatic Compensation, Protecting consumers from quality of service problems*, p. 40
[71] Except for circumstances beyond the reasonable control of Openreach, such as when civil engineering works are required to repair a fault, or where the customer requests a repair appointment beyond the specified timetable (for example, because they cannot be available at the offered time).
[72] https://www.openreach.co.uk/orpg/home/products/serviceproducts/serviceharmonisation/serviceharmonisation/downloads/servicemaintenancelevelsfactsheet.pdf

Retail providers have a choice of which Openreach service level to take. They may then pass on this choice and the cost of any service level to the customer, over and above the default level. The pricing structures are complex, but an upgrade from Openreach's most basic service level (SML1 – resolution within two working days) to its next service level (SML2 – resolution by the end of the next working day) for standard broadband and landline services typically costs between around £2 and £6 a year more.[73] SML2 is currently the basic repair service level available from Openreach for its fibre products.

In 2016, SML1 and SML2 were the most common Openreach service levels purchased by the major providers on the Openreach network, applying to over 99% of the residential customers of the providers we are reporting on (excluding Virgin Media and KCOM). Almost all the customers of Plusnet and EE were on SML1 throughout 2016.[74] Around three in five Post Office customers were on SML1, and two in five were on SML2 throughout 2016.[75]

The take-up of Openreach service levels by TalkTalk, Sky and BT changed over the course of the year:

- At the start of 2016, Sky and TalkTalk purchased Openreach's next-working-day service maintenance level for most of their customers.[76] During the year, they decided to downgrade that service level to Openreach's two-working-day repair service level for most customers.[77]

- In contrast, BT started the year with most of its customers on Openreach's basic maintenance level[78], but upgraded most residential customers onto Openreach's next-working-day service level in summer 2016.[79]

[73] https://www.openreach.co.uk/orpg/home/products/pricing/loadProductPriceDetails.do?data=o1GUUZA4oSGmoXU5lc%2BgZQD265It6W32TNnfEUU7w1FZ6rNZujnCs99NbIKJZPD9hXYmiijxH6wr%0ACQm97GZMyQ%3D%3D [Accessed 10 April 2017]. For standard broadband and landline services SML3 typically costs £37.20-£43.52 and SML4 £48 – £54.32.

[74] Provider data on volume of residential landline and broadband subscribers on each service maintenance level. More than 99% of Plusnet's were on SML1 during the year, as were more than 98% of EE's residential subscribers.

[75] Ofcom analysis of provider data.

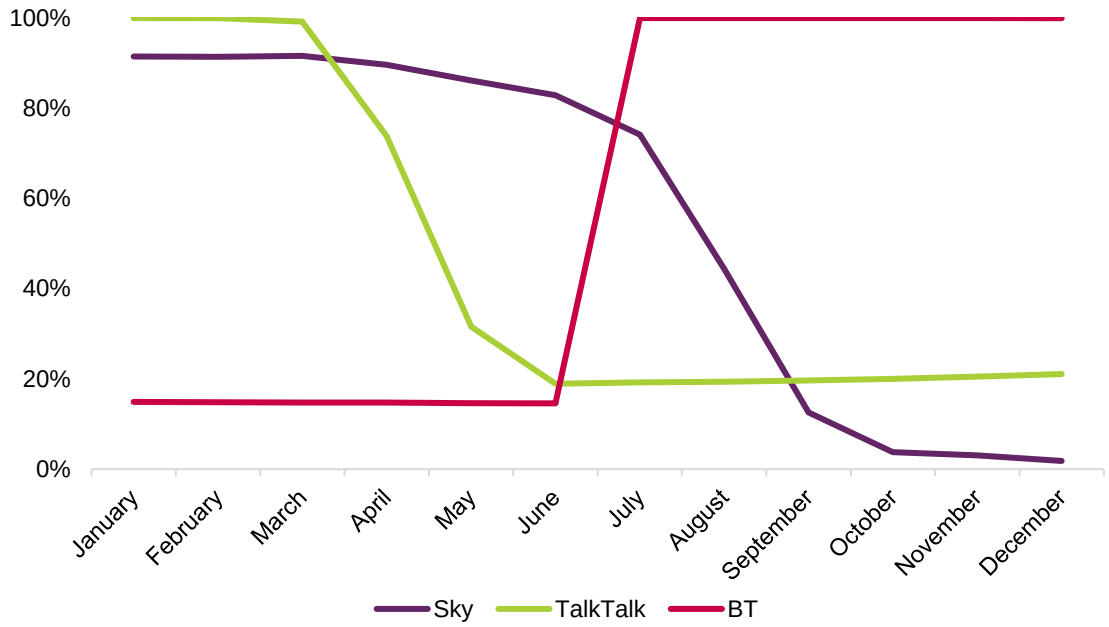
[76] 91% of Sky's residential customers were on SML2 in January, as were over 99% of TalkTalk's residential subscribers.

[77] In December 2016, 21% of TalkTalk's residential subscribers were on SML2. 2% of Sky's residential subscribers were on SML2.

[78] 85% of BT's residential subscribers were on SML1 in January 2016.

[79] Over 99% of BT's residential subscribers were on SML2 from July 2016.

Figure 16: Proportion of providers' landline and broadband customers on Openreach maintenance level 2 in 2016 (providers who changed maintenance level)



Source: Ofcom analysis of provider data

The information we have gathered from providers indicates that the customers of providers which had more customers on SML2 received faster repairs during 2016.

Although choosing SML2 over SML1 should generally result in a faster repair service, Openreach does not always complete repairs within the promised time. In 2014, after a gradual decline in Openreach's performance on fault repairs over several years, Ofcom introduced a minimum standard, requiring it to complete 80% of repairs within service level agreement timescales for SML1 and SML2 by 2017.[80]

Since the introduction of this minimum standard, there appears to have been a degree of improvement in the number of repairs completed within the service level agreement timescales. However, fault repair performance has not quite returned to 2009/10 levels.[81]

[80] Ofcom, *Fixed access market reviews: wholesale local access, wholesale fixed analogue exchange lines, ISDN2 and ISDN30, Volume 1: Statement on the markets, market power determinations and remedies*, June 2014, section 11: https://www.ofcom.org.uk/__data/assets/pdf_file/0032/78863/volume1.pdf. The standards made allowances for matters beyond the reasonable control of Openreach; for example, extreme weather events or criminal or negligent damage.

[81] *Quality of Service for WLR, MPF and GEA*, p. 48

Ofcom is consulting on introducing new standards to require Openreach to meet agreed timescales for SML1 and SML2 93% of the time by 2021.[82] We are also proposing a secondary quality standard to protect customers who fall outside the 93%: Openreach would be required to complete 97% of repairs no later than five working days beyond the relevant service level agreement.

For lines maintained by Openreach, this should improve the consumer's experience of faults, over time. However, customers may not be offered any guarantees regarding the resolution of faults in their contracts, and the actual service experienced may not always mirror the Openreach service levels.

As well as the maintenance level their provider chooses, consumers' experience of network fault resolution on the Openreach network will continue to be shaped by their provider's own customer service and the time it takes them to refer a fault to Openreach. Service problems that originate in some parts of the network; for example, provider equipment in the Openreach exchange or the provider's backhaul service[83], also remain exclusively the responsibility of the retail provider.

Missed engineer appointments can delay fault repairs, and inconvenience consumers

When a customer waits in for an engineer or technician to address their service issue and the engineer does not arrive, it can both prolong the problem and waste the customer's time.

In relation to customers of the providers we are reporting on here, provider-supplied data indicated that Openreach missed 2.7% of repair appointments on average in 2016. It significantly reduced its rate of missed repair appointments over the course of the year, from 5.7% in January 2016 to 2.1% in December 2016.[84] When an Openreach engineer does not arrive during the originally agreed slot or before the agreed slot with the agreement of the customer, the appointment is recorded as 'missed' by Openreach even if it is carried out later the same day.

Providers on the Openreach network, such as Sky, TalkTalk and EE, also use their own or other third-party technicians to address service issues in the home. We have not been able to obtain comparable data on the appointments missed by these technicians for this report, but this is something we will consider reporting on in future.

[82] *Quality of Service for WLR, MPF and GEA*, p. 52. Under these proposals, Openreach would also be required to complete 97% of repairs within six or seven working days, dependent on service level.
[83] Backhaul is the part of the communications network which connects the local exchange to a provider's core network.
[84] Ofcom analysis of retail provider data.

In 2016, 0.2% of Virgin Media repair appointments did not take place on the date agreed with the customer.[85] As with installation appointments, Virgin Media has indicated that its engineers call the customer in advance of an appointment that day, and if the engineer is running early or late, they will try to arrange an alternative time on the same day to complete the work. Where the appointment is agreed to take place earlier or later that same day (and attended) Virgin Media does not class the appointment as 'missed'. In the final quarter of 2016, for 8% of repair appointments Virgin Media engineers arrived either more than one hour before the slot originally agreed with the customer, or sometime after the agreed slot.[86]

Given the harm caused by missed appointments for the provision and repair of services, Ofcom is consulting on requiring providers to compensate consumers when an engineer does not turn up for a scheduled appointment, or cancels with less than 24 hours' notice.[87]

Investment in new infrastructure should improve the reliability and capability of broadband

As noted above, the gradual deployment of superfast services through the BDUK programme, and any broadband universal service obligation the Government chooses to implement, should improve the availability of faster broadband services across the country, and in turn the experience of those who choose to take up these services.

Several providers have indicated they intend to invest in fibre-to-the-premises infrastructure over the coming years. The increased capacity of 'full fibre' networks should mean that the speeds experienced by consumers will be more stable and less likely to degrade at peak times. Because they are less likely than copper-based connections to be affected by water ingress, full fibre connections to the home can also be more reliable and less prone to faults.

We therefore welcome the commitments made by various providers to deploy more fibre-based connections from this year onwards:

- In summer 2017 BT will begin deploying hybrid-fibre G.fast connections delivering speeds of up to 330Mbit/s, with the aim to reach 10 million premises by 2020.[88] In addition, BT intends to roll out full fibre broadband to 2 million premises by 2020.[89]

[85] Ofcom analysis of provider data.
[86] Virgin Media data.
[87] *Automatic Compensation, Protecting consumers from quality of service problems*, section 7
[88] http://www.btplc.com/news/#/pressreleases/bt-ceo-delivers-vision-for-britain-s-digital-future-1222020
[89] http://announce.ft.com/Detail/?DocKey=1323-12804128-356G2BTB6DISE7SP5MMTOSGJ8S

- Virgin Media's parent company has stated that it aims to connect 700,000 to 800,000 homes to its UK network during 2017 as part of its Project Lightning programme.[90] Once completed, more than half of the deployment under Project Lightning is expected to be fibre-to-the-premises rather than co-axial cable.[91]

- KCOM expects around three-quarters of its network to have ultrafast capability by the end of 2017.[92]

- TalkTalk, Sky and CityFibre have committed to extend their FTTP network in York from an initial trial of 14,000 properties across the city to cover a further 40,000 homes.[93]

- Smaller network providers such as Gigaclear, Hyperoptic and IFNL continue to invest in full fibre services in some parts of the country.

Ofcom has recently consulted on allowing providers to build their own fibre networks direct to the home by using BT's existing telegraph poles and ducts. This should incentivise more investment in new ultrafast network infrastructure.[94]

[90] http://www.libertyglobal.com/pdf/presentations/Liberty-Global-Group-Q4-2016-Investor-Call-Presentation-FINAL-AMENDED.pdf In March 2017 Liberty Global (Virgin Media's parent company) indicated it had overestimated the total number of connections made under Project Lightning at the end of 2016. It indicated that this will affect the total number of premises that are connected to Virgin Media's network during the first half of 2017, but that any shortfall during this timeframe should not affect the total number of premises that will be added.

[91] http://www.virginmedia.com/corporate/media-centre/press-releases/virgin-media-q3-2016-results.html

[92] https://www.kcomhome.com/products/broadband/lightstream/

[93] https://www.talktalkgroup.com/articles/talktalkgroup/2016/October/Ultra-Fibre-Optic-Trial-set-to-cover-the-whole-of-York

[94] Ofcom, *Wholesale Local Access Market Review, Initial proposals to develop an effective PIA remedy*, December 2016: https://www.ofcom.org.uk/__data/assets/pdf_file/0024/95109/Wholesale-Local-Access-Market-Review.pdf

Landline and broadband: customer service

Customer service in communications continues to trail behind other sectors

When a communications service goes wrong, the outcome for the customer depends on the speed and effectiveness of their provider's response. Good customer service can prevent a minor issue becoming a major problem and can minimise the adverse impact of a major issue. [95] In contrast, poor customer service can cause customers to expend additional time and energy to get a resolution, leaving them dissatisfied.

The communications sector appears to be lagging behind other sectors when it comes to customer service. Some consumers see communications providers as lacking the flexibility and proactivity of companies in sectors such as retail[96], and telecoms and media was the lowest-ranked sector in the Institute of Customer Service (ICS) satisfaction index for 2016.[97] However, some providers do appear to be offering a better quality of customer service than others.

Research commissioned by Ofcom shows that when customers have a problem with their communications service, they aim to get it off their 'to-do list' as painlessly as possible. [98] Ideally their provider should:

- Take responsibility for the problem, including explaining how the issue will be managed, co-ordinating with other parties and providing regular updates.
- Resolve the problem quickly, as promised, and with minimal customer effort.
- Minimise any stress by showing empathy and being helpful, polite and flexible.

In some cases, consumers can help themselves quickly and with relatively little effort by using information on their provider's website, app or automated telephone system ('IVR'). However, many consumers prefer to talk to a real person, and some consumers, including those in vulnerable circumstances, may not be able to access or use web-based information or successfully navigate IVRs.

[95] *Quality of service in telecoms*, p. 3
[96] *Quality of service in telecoms*, p. 4
[97] *Quality of service in telecoms*, p. 19; The Institute of Customer Service, *UK Customer Satisfaction Index: The state of customer satisfaction in the UK*, January 2017, p. 6: https://www.instituteofcustomerservice.com/research-insight/research-library/ukcsi-the-state-of-customer-satisfaction-in-the-uk-january-2017
[98] *Quality of service in telecoms*, p. 18

Making good quality information accessible is a key part of good customer service, and consumers should consider what is available and what they need when they research new providers.

Even high quality customer information will not remove the need for some consumers to contact their provider. This report focuses on this aspect of customer service, particularly:

- **ease of contact**: how easy it is for consumers to contact their provider in the first place; and
- **complaints handling**: how effectively providers respond to consumers' complaints.

Phone remains the most popular way for customers to contact their landline and broadband providers

As noted above, many issues with broadband and landline phone services originate in the home and can be addressed by the customer with assistance over the phone, by email or by webchat. Provider-supplied data indicate that, on average, landline and broadband providers resolved 77% of issues or queries in a single contact with customers who called them in 2016.[99]

However, a minority of customers with a reason to complain chose not to contact their provider to complain because of the perceived effort involved.[100] Around one in four customers with a reason to complain about their landline and broadband services customers in 2016 chose not to do so.[101][102]

For those who did contact their provider in 2016, data supplied by providers show that the phone

Call transfers

> *You explain your whole situation and they'll go, 'hold on… we'll put you through to someone else. You'll have to relay the whole thing to them, you know'…*
>
> **- Landline and broadband customer**

While being able to get through to an advisor matters to consumers, speaking to the 'right' advisor can be even more important. Being transferred multiple times, and having to re-explain the situation, can be deeply frustrating to customers. Short waiting times are of little benefit to a customer if they do not then get through to an advisor who can help them with their issue.

[99] Ofcom analysis of provider data on the proportion of calls made to each call destination, for existing residential retail customers with enquiries about a fixed voice or broadband service, where the same customer did not call back into the same call destination within the next seven calendar days.
[100] Ofcom Reason to Complain research, April 2017, https://www.ofcom.org.uk/__data/assets/pdf_file/0016/100609/reason-complain-research-2016.pdf. Of the broadband customers who had a reason to complain about their provider but chose not to in 2016, one in five said it was "not worth the hassle" or they "didn't have the time."
[101] Reason to Complain research.
[102] Call transfer quotation from *Quality of service in telecoms*, p.38

remained the most popular method of contact, used 89% of the time. Other methods, such as email and webchat, may be becoming more common, but accounted for only 3% and 8% of contacts respectively.[103]

While email responses generally take hours rather than minutes, customers do not have to wait at the end of a phone, and some find email easier to use when explaining a complicated problem. Webchat is considered easier for quick-to-answer issues, such as a sales query or checking on a local service issue. Both give customers a printable record of their conversation.[104] Letters accounted for less than 1% of contacts.[105] We did not request information on contacts via social media, but some providers have told us that such contacts are growing year on year.

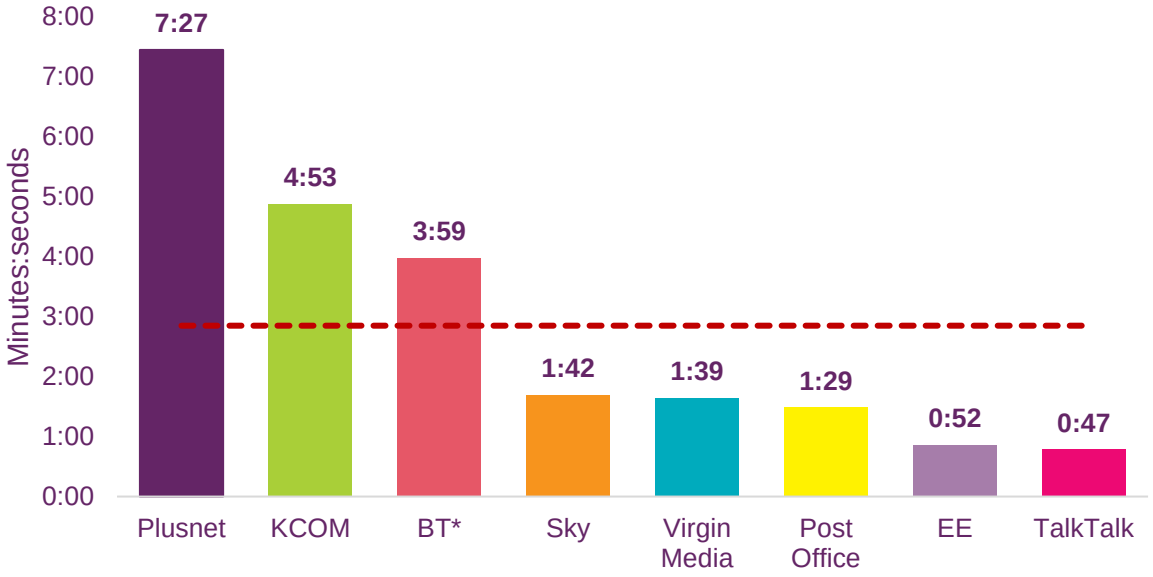
Landline phone and broadband customers waited 3 minutes on average to speak to their provider on the phone in 2016, with one in ten not getting through at all.

All the providers we are reporting on used interactive voice response (IVR) systems to direct customers to the appropriate department in 2016. This involves dialling or speaking through voice recognition software to select a route.

If a customer chooses to speak to someone and an advisor is not available immediately, they will usually be placed in a call waiting queue. The average time spent waiting before speaking to a customer services advisor (the 'call waiting time') was around 3 minutes in 2016 for the landline and broadband providers we are reporting. Plusnet had the longest average call waiting time, taking 7 minutes 27 seconds. TalkTalk had the shortest average call waiting time, with an average of 47 seconds.[106]

[103] Ofcom analysis of provider data.
[104] *Quality of service in telecoms*, p. 36
[105] Ofcom analysis of provider data.
[106] Provider data. Average call waiting time is the overall mean time, in seconds, customers spent in a call queue when they were waiting to get through to a call services agent on the contact system provided for new and existing residential fixed voice and broadband customers, not including time taken to navigate options before being placed in the queue. The data reported is the overall average for calendar year 2016. It includes all call types, including calls enquiring about new services and those reporting problems with existing services.

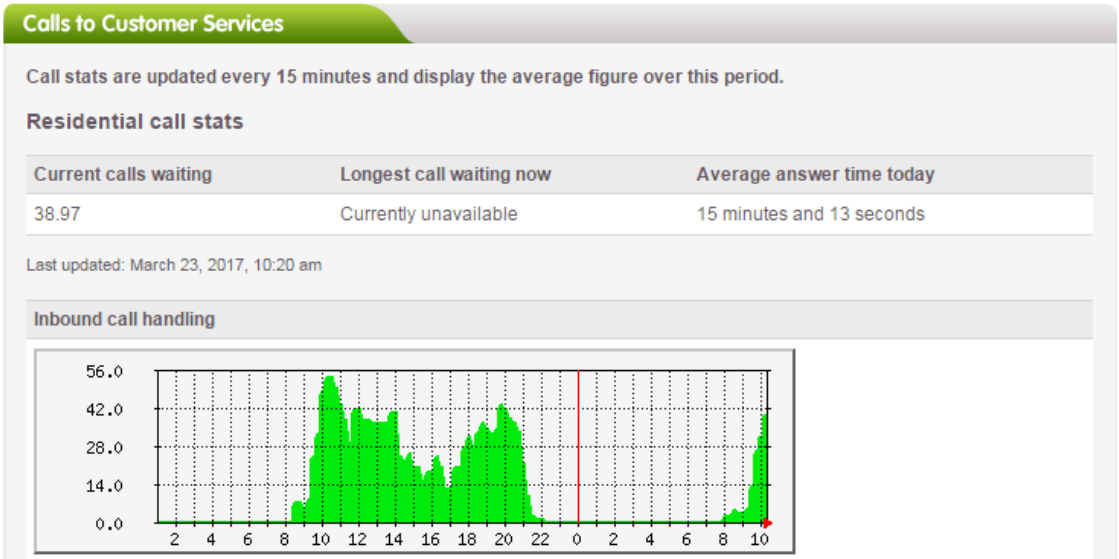
Figure 17: Average call waiting time, landline and broadband providers (2016)



Source: Ofcom analysis of provider data
BT offered customers waiting in the call queue in 2016 the option to receive a call back, which may reduce call waiting times. BT was unable to provide information on how long on average it takes to get back to a customer when they have been offered a call-back. Dotted line indicates average (2 minutes 51 seconds**).*

Averages do not show the daily variations in the call waiting time, which can be significant. For example, more people tend to call before and after working hours, and waiting times may be much longer at these times. Plusnet provides live information about answering times on its website, allowing customers to make an informed choice about when to call. [107]

Figure 18: live customer service information provided by Plusnet (accessed 23 March 2017)

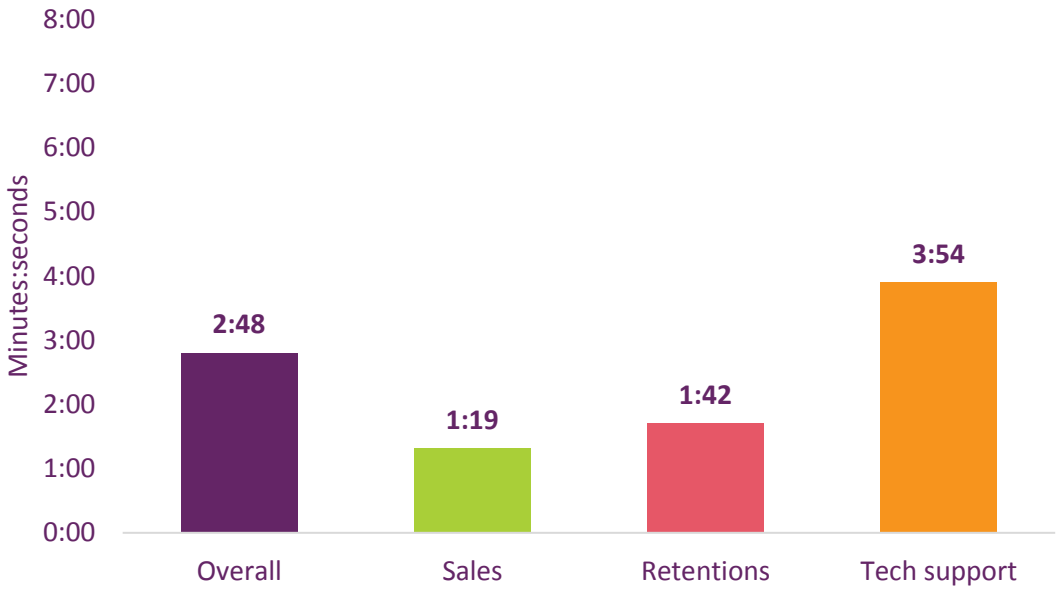


[107] http://www.plus.net/supportpages.html?a=212

The average call waiting time also varied over the course of the year for individual providers. When an issue affects many customers, it can lead to an increase in calls and in turn an increase in the call waiting time. For example, there was a spike in several providers' call waiting times during December 2016 following the Mirai worm attack which affected customers' broadband routers.[108]

Calls about customer service typically had a longer call waiting time than sales calls. Across providers, sales calls were answered, on average, 2 minutes 35 seconds faster than technical support calls. Calls about cancelling a service ('cancellations' or 'retentions') were answered 2 minutes 12 seconds faster than technical support calls.[109] In our research, we found that some customers call the sales line when they have a problem, thinking it likely to be answered more quickly than the main customer services number.[110]

Figure 19: Average call waiting time by call type, landline and broadband providers (2016)

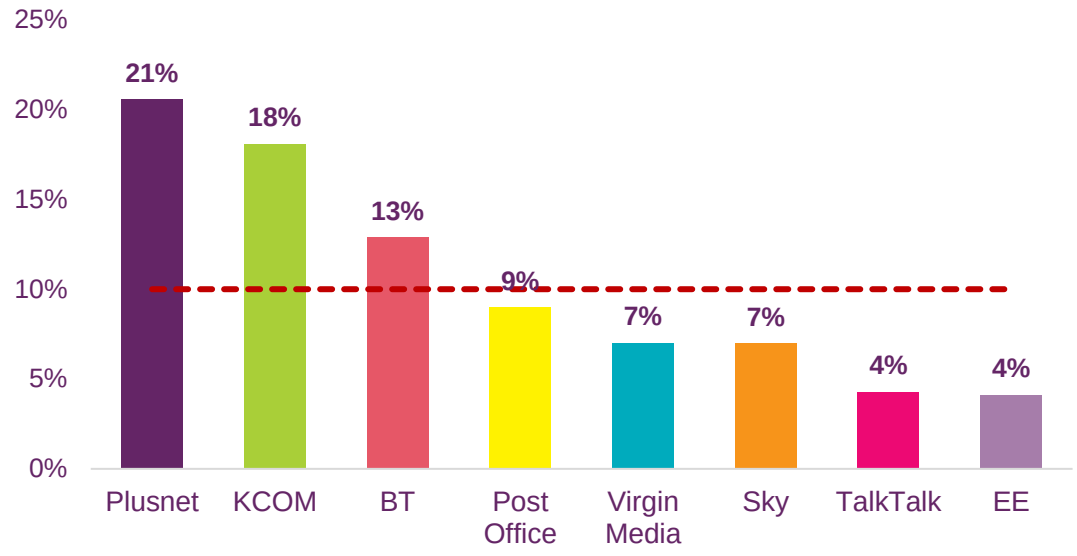


Source: Ofcom analysis of provider data

Longer average call waiting time correlated strongly with the number of consumers hanging up before they got through to speak to an advisor. As well as having the highest call waiting time, Plusnet had the highest 'abandonment rate', with more than one in five (21%) customers leaving the call queue before speaking to someone. EE and TalkTalk had the lowest rate, at 4%.[111]

[108] Ofcom analysis of provider data.
[109] Ofcom analysis of provider data.
[110] *Quality of service in telecoms*, p. 24
[111] Provider data. The abandonment rate is the overall number of occasions where a customer abandoned the call while in a call queue waiting to speak to a call services agent as a percentage of total occasions customers were waiting in a call queue during calendar year 2016.

Figure 20: Customer calls abandoned while waiting in the call queue, landline and broadband providers (2016)



*Source: provider data. Dotted line indicates average (**10%**).*

It is important to note that not all customers choose to leave the call queue because of how long they have been waiting. Recorded messages that are played while on hold may cause customers to leave the queue after receiving useful information, for example on a known fault that is being investigated. Providers using these messages may therefore show higher abandonment rates.

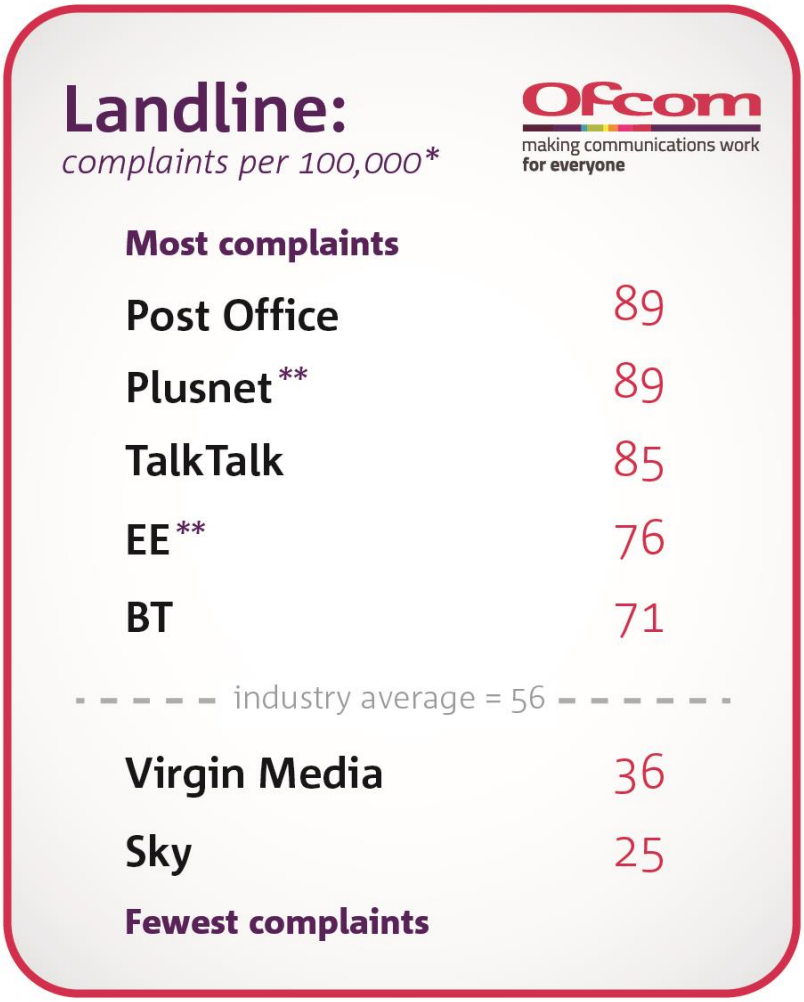
The volume of complaints received by Ofcom differed by provider over 2016

On average, Ofcom receives nearly 300 calls a day from consumers, who also contact us by post and through our website. Many of these contacts result in complaints, often made after a consumer has been unable to resolve an issue with their provider to their satisfaction. We record these complaints by service and by provider but we do not investigate cases on an individual basis. However, the complaints we receive about providers can be an indicator of poor service quality.

Each quarter Ofcom reports on the complaints we receive, in order to help inform consumer decision-making. Below we set out the complaints generated by each of the providers reported on in this document, over the whole of 2016. In line with our quarterly reports, the data is presented as complaints per 100,000 subscribers (using subscriber figures at 30 June 2016).[112] Further information about how we compile our complaints data can be found in the most recent quarterly report publication.

[112] We decided to use subscriber figures at a single point (rather than averaging across the four quarters) in the year, to minimise manipulation of the data. We chose to use subscriber figures as of 30 June as this represents the mid-point of the calendar year reported on.

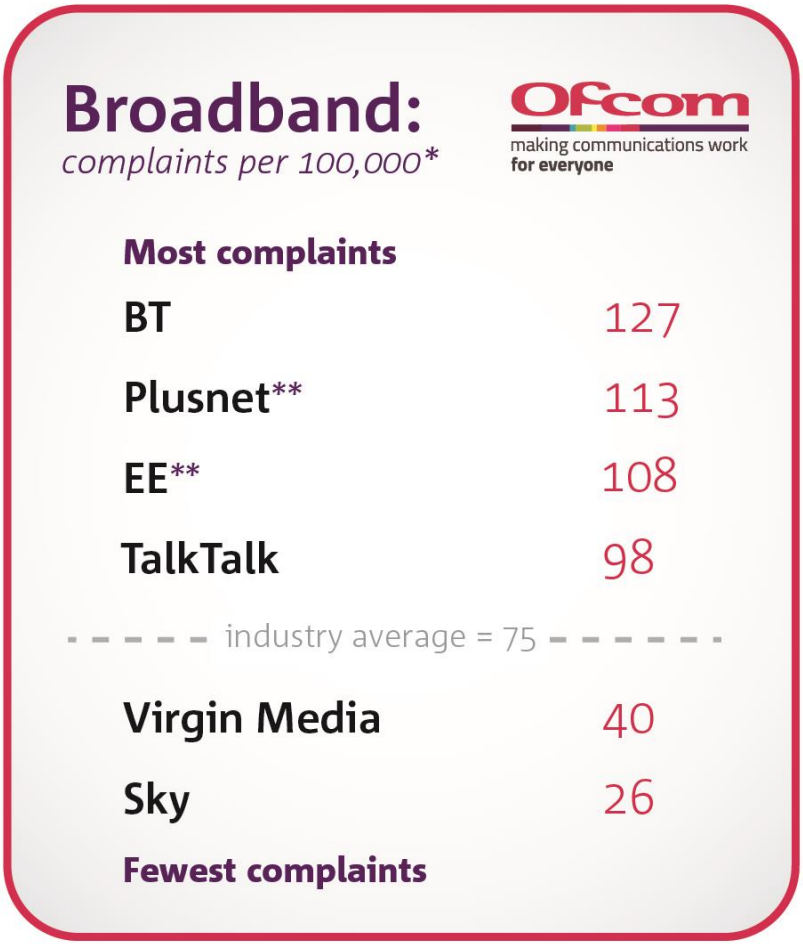
Figure 21: Landline complaints per 100,000 subscribers to Ofcom in 2016



*All figures rounded to nearest whole number.
Actual measurable difference may in some cases be less than one.
**Brand owned by BT Group
Note: Industry average is limited to those providers included in the report
Source: Ofcom, CCT data

The Post Office and Plusnet generated the highest number of complaints per 100,000 subscribers to Ofcom about landline phone services in 2016 (89) closely followed by TalkTalk (85). Sky generated the lowest number of complaints (25), and Virgin Media (35) was also below the industry average (56).

Figure 22: Broadband complaints per 100,000 subscribers to Ofcom in 2016



**All figures rounded to nearest whole number.*
Actual measurable difference may in some cases be less than one.
***Brand owned by BT Group*
Note: Industry average is limited to those providers included in the report
Source: Ofcom, CCT data

For broadband services, BT generated the highest number of complaints per 100,000 subscribers to Ofcom in 2016 (127). As with landline phone complaints, Sky generated the lowest number of complaints (26), and Virgin Media (40) was also below the industry average for broadband complaints (75).

Only 56% of those who complained to their provider about their broadband service in 2016 were satisfied with the response

Most customers who have a reason to complain about their service complain to their provider, not to Ofcom.[113] Complaints handling is a crucial part of customer service. Unless providers respond

[113] 77% of broadband customers with a reason to complain about their service in 2016 went on to make a complaint, 1% of those who complained did so to Ofcom and 23% did not make a complaint at all. 76% of landline customers with a reason to complain complained to their provider, 3% of those who complained did

effectively to dissatisfied customers, issues can become drawn-out and any harm can increase. Ofcom requires communications providers to have in place transparent, accessible and effective complaints handling procedures.[114]

Our research on satisfaction with complaints handling has found that around three in five landline phone customers (64%) and just over half (56%) of all broadband customers who complained to their provider in the last six months of 2016 were satisfied with how their complaint was handled.[115] Only 62% of complaints about landline services and 57% of complaints about broadband services were completely resolved in the time period asked about.

Previous Ofcom research had showed that satisfaction with customer service received is generally lower for those who contact their provider with a complaint, than those who contact them about something else.[116] Nevertheless, as complaints handling is such a crucial element of customer service, we consider that significant improvement is required in the sector's overall performance.

Satisfaction with certain aspects of complaints handling was lower than we would expect. As noted above, ease of contact is vital to the customer's experience of dealing with their provider, and may shape their willingness to make a complaint in future. But only 43% of those who complained about their broadband service were satisfied with the ease of getting through to their provider on the phone[117] and just 53% were satisfied with the time taken to handle their issue.

Research by The Institute of Customer Service indicates that average satisfaction with the handling of complaints in the telecoms and media sector was lower than in any other UK sector except national public services in 2016. Telecoms and media customers were also less satisfied on average

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so to Ofcom and 24% did not make a complaint at all. *Reason to complain research*, April 2017. https://www.ofcom.org.uk/__data/assets/pdf_file/0016/100609/reason-complain-research-2016.pdf

[114] See Ofcom's Approved Complaints Code of Practice: https://www.ofcom.org.uk/__data/assets/pdf_file/0035/85967/complaints-handling-code.pdf

[115] Ofcom, *Quality of Customer Service research*: https://www.ofcom.org.uk/__data/assets/pdf_file/0008/100610/quality-customer-service-research-2016.pdf The research was conducted via an online panel sample and fieldwork took place from 8 December 2016 to 6 January 2017 (as such the last six months refers to the six months prior to fieldwork: i.e. June 2016- December 2016). More details can be found at annex 2.

[116] For example, in 2015 53% of broadband customers who contacted their provider with a complaint were satisfied with the customer service they received, compared to 74% who contacted their provider for another reason. Savile Rossiter-Base, *Quality of Customer Service Report*, January 2016, p. 19: https://www.ofcom.org.uk/__data/assets/pdf_file/0018/83025/quality_of_customer_service_report_2015.pdf

[117] Among those who contacted their provider over the phone.

with specific aspects of complaints handling, including staff understanding the issue, staff doing what they say they will do, the attitude of staff and speed of resolving complaints.[118]

Overall satisfaction with complaint handling in the landline market did not vary by provider

In the landline market, overall satisfaction with complaint handling did not vary by provider, although Sky performed above the landline sector average for three of the nine specific aspects of customer service that we measured.

Figure 23: Landline - overall satisfaction and satisfaction with specific aspects of customer service measured[119]

	Total landline	BT	Sky	Talk Talk	Virgin Media
Overall satisfaction with service you received over this complaint - % satisfied	62%	62%	65%	61%	58%
% Satisfied with specific aspects of customer service measured:					
Ease of finding provider contact details	59%	59%	65%	61%	66%
Ease of getting through to the right person (PHONE)[1]	45%	45%	**60%**	44%	52%
Time taken to handle your issue	59%	59%	64%	57%	59%
Getting the issue resolved to your satisfaction	65%	65%	63%	61%	61%
Courtesy and politeness of advisors	64%	64%	**71%**	64%	69%
Advisor doing what they said they would do	61%	61%	**68%**	61%	62%
Logging of query details to avoid having to repeat yourself	60%	60%	65%	58%	63%
Offering compensation or a goodwill payment	52%	52%	58%	55%	54%
Willingness to help resolve your issue	65%	65%	67%	66%	65%

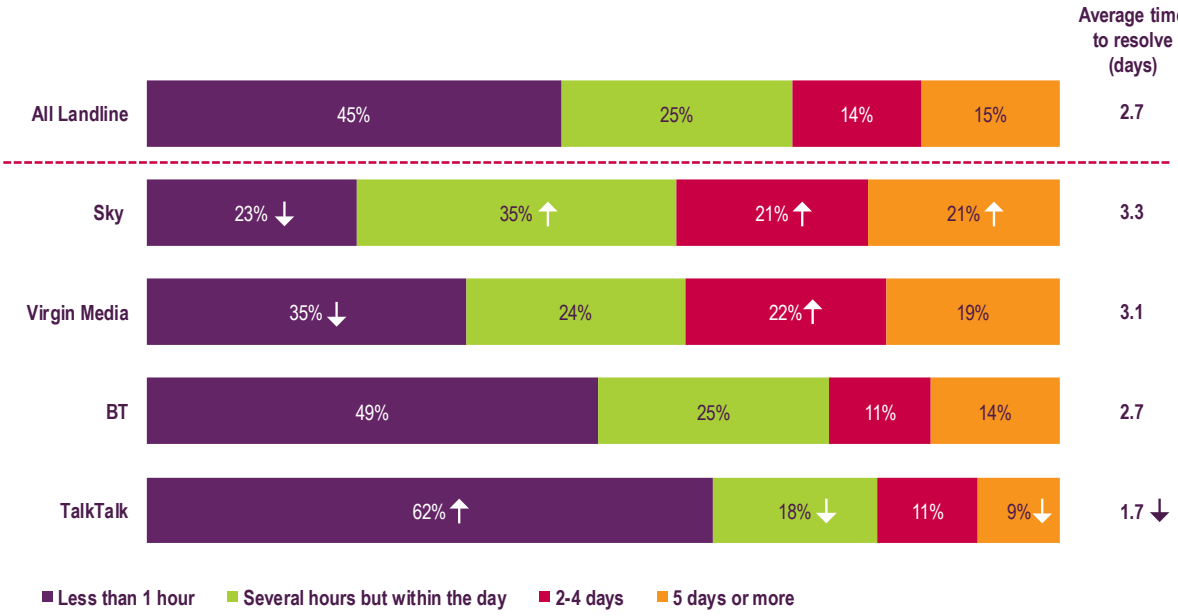
*Source: Ofcom Quality of customer service – complaints research, online survey, fieldwork carried out by BDRC Continental, December 2016/January 2017. Base: All who complained about landline service in past six months (2468), BT (925), Sky (489), TalkTalk (537), Virgin Media (517). Base: All contacting by phone (1341/501/240/278/322). **Red** or **green** text indicates significantly higher/lower than the sector average at the 95% confidence level.*

Among landline phone customers whose complaint had been completely resolved, TalkTalk customers were more likely than the sector overall to report that the complaint had been resolved in less than an hour, and less likely to report that it took five days or more.

[118] The Institute of Customer Service, *UK Customer Satisfaction Index: Telecommunications & Media Sector Report*, January 2017: https://www.instituteofcustomerservice.com/research-insight/research-library/ukcsi-telecommunications-media-sector-report-january-2017

[119] The data in the charts is presented at both a total sector level and at a provider level. Total sector level data is weighted to be representative of the UK overall, and any provider-level data is unweighted. The provider-level data is therefore representative of customers of the provider with a complaint in the six months prior to fieldwork and who are online. More information can be found in annex 2.

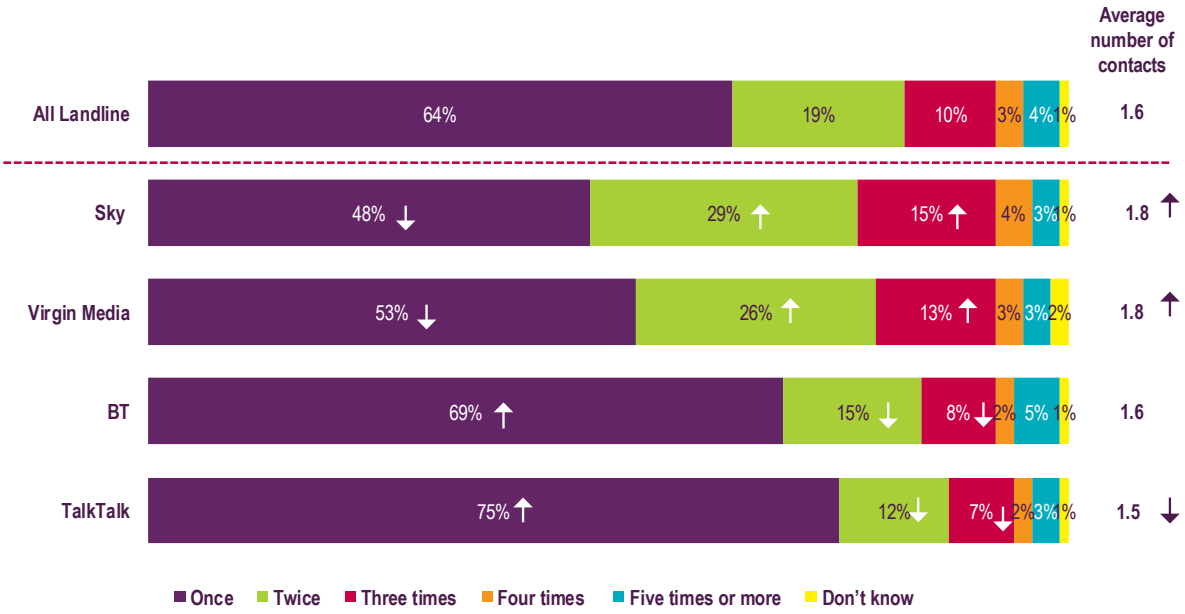
Figure 24: Landline - time taken to completely resolve the complaint (among those whose complaint was completely resolved)



Source: Ofcom Quality of customer service – complaints research, online survey, fieldwork carried out by BDRC Continental, December 2016/January 2017 Q. How long did it take to resolve the issue with [provider]? Base: All who complained about the landline service in the past six months whose issue was completely resolved – All (1583), BT (606), Sky (293), TalkTalk (378), Virgin Media (306) Arrows indicates significantly higher/lower than the sector average at the 95% confidence level.

TalkTalk and BT customers were more likely than the sector overall to report that the complaint had been resolved in one contact, and less likely to report that it needed two or three contacts.

Figure 25: Landline - number of contacts with provider to completely resolve the complaint



Source: Ofcom Quality of customer service – complaints research, online survey, fieldwork carried out by BDRC Continental, December 2016/January 2017 Q. How many times have you been in contact with [provider] in relation to this particular complaint so far? Base: All who complained about the landline service in past six months whose issue was completely resolved – All (1583), BT (606), Sky (293), TalkTalk (378), Virgin Media (306). Arrows indicates significantly higher/lower than the sector average at the 95% confidence level.

Sky customers were more likely to be satisfied with complaints handling

Sky broadband customers were more likely than the sector average to report being satisfied overall with how a complaint was handled (61%), and with five of the nine specific aspects of customer service measured. TalkTalk (51%) performed below average for overall satisfaction with complaint handling, and for six of the nine specific aspects of customer service measured.

Figure 26: Broadband - overall satisfaction and satisfaction with specific aspects of customer service measured[120]

	Total broadband	BT	EE/ Orange	Sky	TalkTalk	Virgin Media
Overall satisfaction with service you received over this complaint - % satisfied	56%	56%	53%	61%	51%	54%
% Satisfied with specific aspects of customer service measured:						
Ease of finding provider contact details	62%	58%	55%	65%	60%	67%
Ease of getting through to the right person (PHONE)[1]	43%	41%	46%	56%	44%	54%
Time taken to handle your issue	53%	54%	50%	56%	46%	53%
Getting the issue resolved to your satisfaction	56%	58%	53%	59%	51%	54%
Courtesy and politeness of advisors	66%	63%	58%	72%	65%	68%
Advisor doing what they said they would do	60%	57%	59%	68%	56%	61%
Logging of query details to avoid having to repeat yourself	56%	57%	50%	64%	50%	55%
Offering compensation or a goodwill payment	45%	47%	44%	48%	40%	42%
Willingness to help resolve your issue	61%	60%	60%	68%	57%	60%

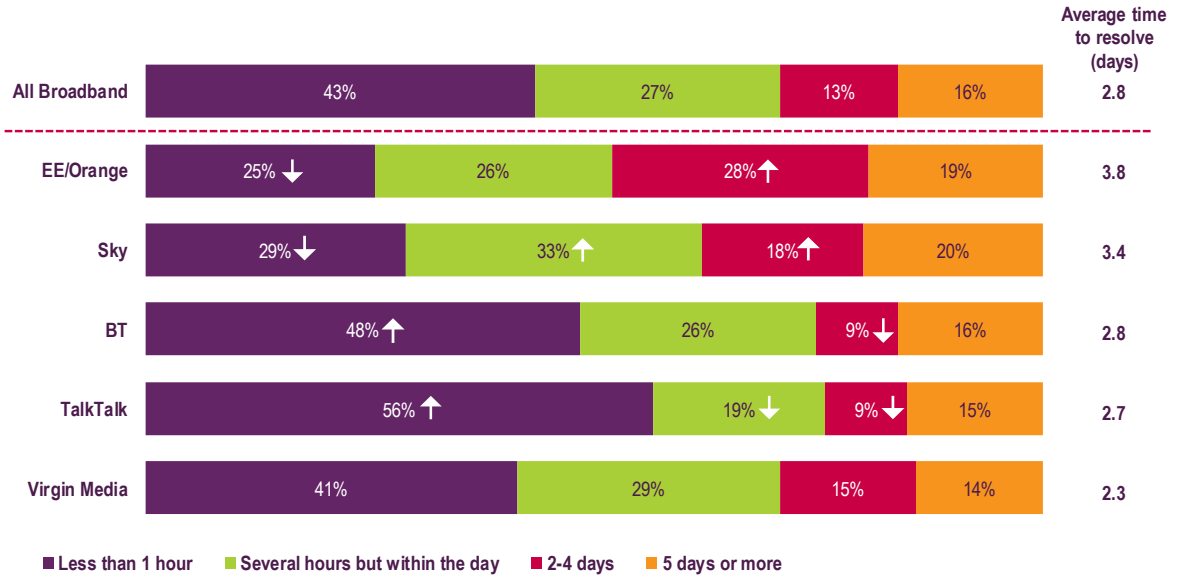
Source: Ofcom Quality of customer service – complaints research, online survey, fieldwork carried out by BDRC Continental, December 2016/January 2017
Base: All who complained about broadband service in past six months (3558), BT (1017), EE/Orange (215), Sky (660), TalkTalk (843), Virgin Media (823)
Base: All contacting by phone (2290/583/134/459/515/599)
***Red** or **green** text indicates significantly higher/lower than the sector average at the 95% confidence level.*

TalkTalk and BT broadband customers were more likely than the sector average to report that their complaint had been resolved in less than an hour

Around 70% of resolved broadband complaints were reported as having been resolved within a day, while 13% of resolved broadband complaints were reported as taking two to four days to resolve, and 16% took five or more days to resolve. Among those with a resolved broadband complaint, BT and TalkTalk customers were more likely than the sector average to report that their complaint had been resolved within an hour.

[120] The data in the charts is presented at both a total sector level and at a provider level. Total sector level data is weighted to be representative of the UK overall, and any provider-level data is unweighted. The provider-level data is therefore representative of customers of the provider with a complaint in the six months prior to fieldwork and who are online. More information can be found in annex 2.

Figure 27: Broadband - time taken to completely resolve the complaint (among those whose complaint was completely resolved)

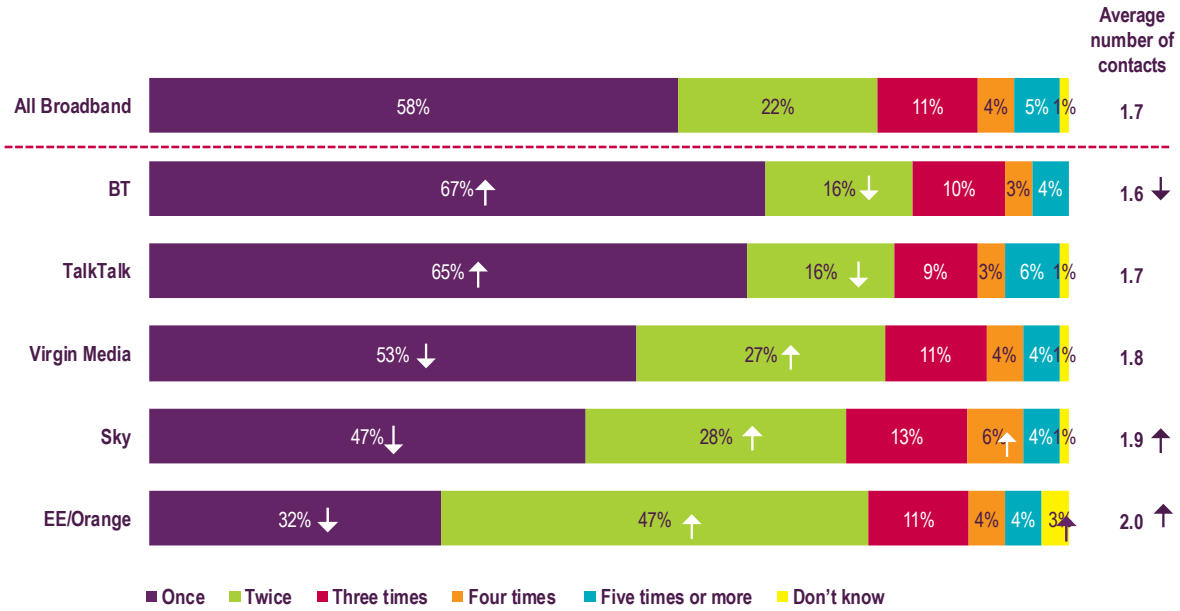


Source: Ofcom Quality of customer service – complaints research, online survey, fieldwork carried out by BDRC Continental, December 2016/January 2017
Q. How long did it take to resolve the issue with [provider]?
Base: All who complained about broadband service in past six months whose issue was completely resolved – All (2010), BT (622), EE/Orange (114), Sky (361), TalkTalk (466), Virgin Media (447)
Arrows indicates significantly higher/lower than the sector average at the 95% confidence level.

Eighty per cent of completely resolved broadband complaints were resolved with one or two contacts.

On average, completely resolved broadband complaints were resolved in just under two contacts with the provider. Nine per cent of complaints were resolved in four or more contacts. On average, Sky and EE/Orange customers reported more contacts to resolve an issue, and BT customers reported fewer, compared to the sector overall.

Figure 28: Broadband: number of contacts with provider to completely resolve the complaint



Source: Ofcom Quality of customer service – complaints research, online survey, fieldwork carried out by BDRC Continental, December 2016/January 2017
Q. How many times have you been in contact with [provider] in relation to this particular complaint so far?
Base: All who complained about broadband service in past six months whose issue was completely resolved – All (2010), BT (622), EE/Orange (114), Sky (361), TalkTalk (466), Virgin Media (447)
Arrows indicates significantly higher/lower than the sector average at the 95% confidence level.

Customers who are not satisfied with how their complaint was handled may wish to take their case to an alternative dispute resolution scheme

If a customer believes their provider is not dealing with a complaint properly, they can escalate it to the appropriate alternative dispute resolution (ADR) scheme. The scheme will examine the complaint and decide whether it should be resolved, wholly or partly, in favour of the customer or the provider. Complaints can be taken to ADR when a provider sends a 'deadlock' letter on request, or after eight weeks without resolution.

All communications providers must be signed up to one of two ADR schemes approved by Ofcom: Ombudsman Services: Communications (OS), and Communications and Internet Services Adjudication scheme (CISAS).

Both OS and CISAS have recently published data summarising the subject matter of the complaints they received between October and December 2016, broken down by provider. The information can be found on their respective websites: OS and CISAS

In relation to broadband and landline services, the main complaint drivers over the period were 'service quality' (for example, loss of service, disconnections and broadband speeds), billing, and

contract issues.[121] Figure 29 shows the most common types of complaint made to ADR schemes in relation to each of the largest providers.

Figure 29: Most common type of complaints made to ADR schemes, largest landline and broadband providers[122]

Provider	Most common	Second most common
BT	Service quality[123] (41%)	Billing (22%)
Plusnet	Service quality (39%)	Contract issues (17%)
Post Office	Service quality (38%)	Billing (22%)
Sky	Service quality (46%)	Billing (17%)
TalkTalk	Service quality (47%)	Contract issues (17%)
Virgin Media	Contract issues (28%)	Service quality (19%) / billing (19%)

Source: Ombudsman Services and CISAS

Ofcom is looking at ways to improve consumers' experience of complaint handling

We are currently reviewing the rules on complaints handling that apply to providers (General Condition 14).[124] We have proposed strengthening the rules in several areas, including requiring that providers inform consumers how their complaint will be handled, how long it will take, and that they have the right to use ADR if their complaint concludes without resolution. A statement setting out our conclusions from this review will be published later in 2017.

[121] Both schemes log one case per service. That means that each case logged may include a number of different complaints relating to the same service (for example, a consumer may complain about their bill but also their provider's customer service in relation to their broadband service). Both schemes allocate each case to a single category of complaint according to what they perceive to be the main issue raised by the complainant.
[122] This data also includes ADR complaints to the mobile customers of these providers, where relevant.
[123] 'Service quality' complaints include, for example, those relating to loss of service, network coverage, disconnections and download speeds.
[124] Ofcom, *Review of the General Conditions of Entitlement, Consultation on the general conditions relating to consumer protection*, December 2016: https://www.ofcom.org.uk/__data/assets/pdf_file/0032/95873/Review-of-the-General-Conditions-of-Entitlement-Consultation-on-the-general-conditions-relating-to-consumer-protection.pdf

We are also currently carrying out a review of our approval of Ombudsman Services and CISAS, which will consider whether the schemes continue to meet required criteria such as accessibility, effectiveness and fairness.[125]

Free and independent assistance for consumers wishing to complain

Citizens Advice	Can provide advice on consumer problems and tell you which laws apply to your situation. Helpline: 03454 04 05 06 Website: **www.citizensadvice.org.uk**
Consumer Council - Northern Ireland	Investigates enquires and complaints on behalf of consumers. Complaints line: 0800 121 6022 Email: complaints@consumercouncil.org.uk Website: **www.consumercouncil.org.uk**
Resolver	Provides easy access to provider contact details and a log of your complaint details. Also makes recommendations on steps to take with a complaint. Website: **www.resolver.co.uk**

[125] Ofcom, *Review of Alternative Dispute Resolution Schemes, Call for Inputs*, March 2017: https://www.ofcom.org.uk/__data/assets/pdf_file/0034/99664/adr-review-call-inputs-2017.pdf