

Mobile services

Overview

More than nine in ten adults in the UK use a mobile phone.¹²⁶ As well as making and receiving calls, three-quarters use their mobiles to access the internet, and the use of mobile data continues to rise year on year.¹²⁷

For many younger, and family households, a reliable mobile service is considered vital, especially for those with an out-and-about lifestyle.¹²⁸ Two-thirds of households say they would struggle to function without their mobile service.¹²⁹

This section explores the service quality that mobile users received from their providers in 2016, including:

- **Overall satisfaction** - how satisfied customers were with their service and whether they had a reason to complain.
- **Service performance** - whether services were available and working as they should.
- **Customer service** - the experience of contacting providers and how effectively they resolved complaints.

¹²⁶ Ofcom, *Technology Tracker H2 2016*, table 24:

https://www.ofcom.org.uk/data/assets/pdf_file/0032/93596/Ofcom-Technology-Tracker-H2-2016.pdf

¹²⁷ *Technology Tracker H2 2016*, table 32

¹²⁸ 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

¹²⁹ 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

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

Overall satisfaction and reasons to complain

Most mobile users were satisfied with their service in 2016 but there were differences between providers

Ninety-two per cent of mobile phone customers reported they were satisfied with their service overall in 2016, up from 89% in 2015.¹³⁰ Tesco Mobile customers had higher than average satisfaction, with 96% of customers reporting satisfaction with the overall service.

Figure 30: Satisfaction with mobile phone provider

	Total	EE	O2	Tesco Mobile	Three	Virgin Mobile	Vodafone
Satisfaction with overall service	92%	92%	93%	96%	89%	94%	89%

Source: Ofcom Switching Tracker, July to August 2016

Base: All adults aged 16+ who are the decision-maker and express an opinion on mobile (2262), receiving their service from EE (577), O2 (555), Vodafone (315), 3 (225), Virgin (150), Tesco (140). 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.

Only 4% of mobile users had a reason to complain about their service in 2016, although this varied by provider

Four per cent of mobile customers reported that they had a reason to complain about their provider in the last 12 months, a decrease since 2015 (6%).¹³¹ The proportion of mobile customers with a reason to complain was significantly lower than for broadband customers (13%) and landline phone customers (5%).

¹³⁰ Ofcom, *Switching Tracker H2 2016*, table 72:

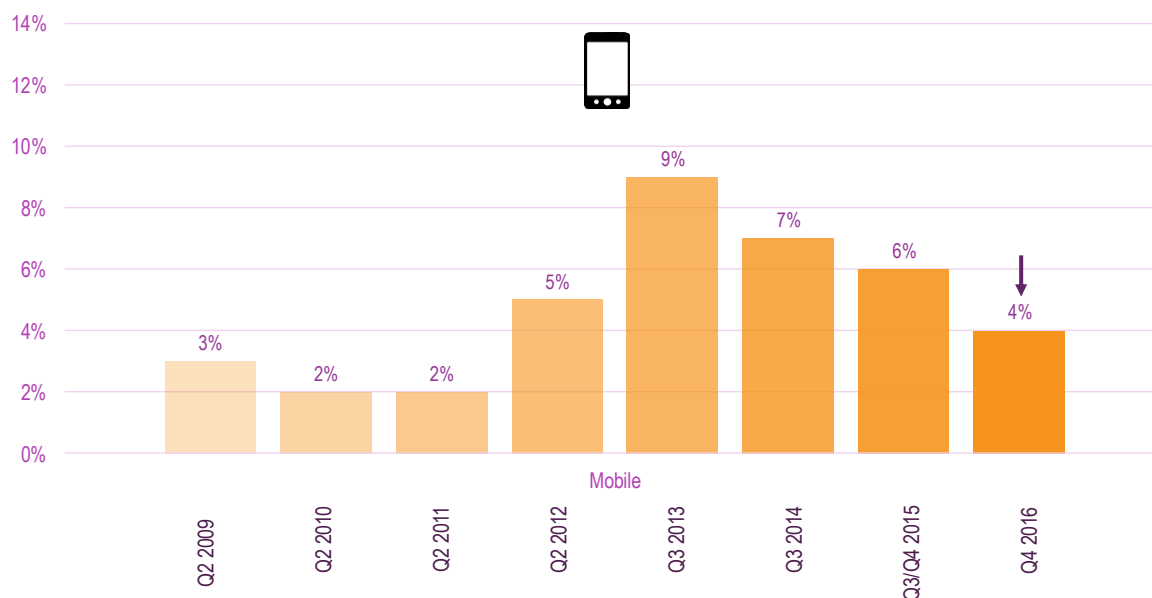
https://www.ofcom.org.uk/_data/assets/pdf_file/0025/95524/Switching-Tracker-2016-Data-tables.pdf

¹³¹ Ofcom, *Reason 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 31: Proportion of mobile consumers who reported a reason to complain in the last 12 months, whether or not they went on to make a complaint



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: Base: All UK households 16+ (n 2016: mobile = 5875. n 2015: mobile = 3033).

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?

↑ ↓ Represent a significant increase or decrease since 2015.

The proportion of Vodafone customers with a reason to complain was higher than mobile customers overall (7% vs. 4%). This is in line with complaints to the Ofcom contact centre, which received considerably more complaints per subscriber from Vodafone customers than from any other mobile provider. Data collected by Ombudsman Services (the scheme which provides alternative dispute resolution for Vodafone) shows that a majority of complaints about Vodafone (53%) related to billing issues.¹³²

¹³² <https://www.ombudsman-services.org/for-consumers/complaints-data>

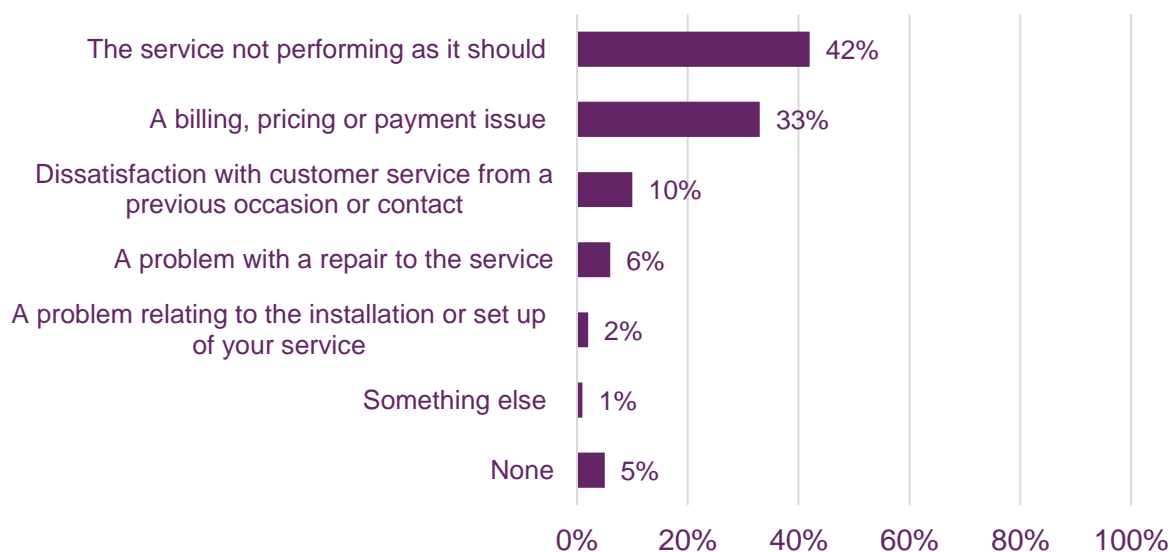
Figure 32: Proportion of mobile customers with a reason to complain in the last 12 months, by provider

	Total mobile	EE/ Orange/ T-Mobile	O2	Tesco Mobile	Three	Virgin Mobile	Vodafone
Reason to complain in the last 12 months	4%	4%	3%	2%	5%	5%	7%

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 a mobile phone 16+ (5875), EE/Orange/T-Mobile (1517), O2 (1349), Tesco Mobile (464), Three (624), Virgin (360), Vodafone (859) 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 or lower than those for mobile consumers as a whole (4%).

Of those with a reason to complain, the most common reason was the service not performing as it should (42%), e.g. poor call or line quality, loss of service or voicemails being delivered late. The second most common cause for complaint was billing, pricing or payment issues (33%).

Figure 33: Reasons to complain about mobile service or provider



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 mobile phone (231) Q. What was the most recent issue you had reason to complain about in connection with your mobile phone?

We examine below how satisfied consumers were with complaint handling, among those who had made a complaint to their provider (see page 76).

Mobile: service performance

Mobile signal coverage is the most important single factor in consumers' quality of experience. Without adequate signal, mobile services cannot meet consumers' basic needs and expectations.¹³³ Poor mobile signal can lead to:

- calls dropping out, or not being able to make and receive calls at all;
- loss of voice quality, so that parts of the call are missed and the conversation cannot flow;
- text messages being undelivered or delivered late; or
- data being unavailable or slow to connect.

Mobile network capacity is another factor in the consumer experience; the issues listed above also arise when the parts of the network to which the consumer is connected fill up with other users' traffic (become 'congested'). At busy times, when many people are trying to use mobile services at once, even mobile users who have a signal may not get the performance they expect from their network.

Good coverage is essential for a reliable mobile experience

Coverage levels vary by operator, and this is reflected in how satisfied people are with their reception. In 2016, 86% of customers were satisfied with the reception, or ease of accessing their mobile service (an increase from 81% in 2015), with Three customers reporting below-average satisfaction (80%).¹³⁴

¹³³ *Quality of service in telecoms, Residential consumer and SME experiences of quality of service in fixed line, broadband and mobile telecoms*, p. 18

¹³⁴ *Switching Tracker 2016*, table 76

Figure 34: Customer satisfaction with their provider's service reception¹³⁵

	Total	EE	O2	Tesco Mobile	Three	Virgin Mobile	Vodafone
Satisfaction with reception of service	86%	85%	86%	91%	80%	87%	86%

Source: Ofcom Switching Tracker, July to August 2016

Base: All adults aged 16+ who are the decision-maker and express an opinion on mobile (2262), receiving their service from EE (577), O2 (555), Vodafone (315), 3 (225), Virgin (150), Tesco (140). 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. Tesco Mobile is provided over the O2 network and Virgin Mobile is provided on the EE network

Nineteen per cent of people in rural areas were dissatisfied with their mobile reception, compared to 6% of people in urban areas and 8% overall. This is a significant decrease since 2015, when 31% of those in rural areas reported being dissatisfied.¹³⁶

Each year, in our *Connected Nations* report, we provide an update on the levels of voice and data coverage available across the UK. The most recent report shows coverage levels as of June 2016. We also offer a tool which consumers can use to check the latest coverage levels offered by providers in their area: <https://checker.ofcom.org.uk>.

Figure 35 below shows the coverage of mobile voice services for each operator in the UK, as of June 2016. We expect improvements during 2017 as operators deploy more voice-enabled 4G infrastructure.

Figure 35: UK coverage for each operator's mobile voice service, June 2016

	O ₂ (2G, 3G)	Vodafone (2G, 3G)	EE (2G, 3G, 4G)	Three (3G, 4G)
Indoor, premises	96%	95%	96%	95%
Outdoor geographic, landmass	78%	82%	80%	76%
Outdoor, premises	99%	99%	99%	99%

Source: Ofcom analysis of operator data (*Connected Nations 2016*)

¹³⁵ *Switching Tracker 2016*, table 76

¹³⁶ *Switching Tracker 2016*, table 76

All four network operators increased their 4G coverage between 2015 and 2016, with outdoor premises coverage increasing from 46% in 2015 to 86% in 2016. Outdoor coverage reached 40% of the UK landmass, up from 8%.¹³⁷ However, coverage in rural areas, particularly in Scotland and Wales, still lags behind other areas of the UK. Overall coverage by data services is still driven by 3G, which is available more widely than 4G, but this will change in 2017 as 4G roll-out continues.

Figure 36: UK coverage for each operator’s mobile data services, based on combined 3G and 4G coverage, June 2016

	O ₂	Vodafone	EE	Three
Indoor, premises	92%	92%	95%	87%
Outdoor geographic, landmass	63%	66%	76%	70%
Outdoor, premises	96%	97%	99%	97%

Source: Ofcom analysis of operator data (Connected Nations 2016)

Poor coverage on transport networks is also a cause of concern for many consumers. The UK motorway networks, on average, have 97% voice coverage, falling to 62% on A and B roads.¹³⁸

Mobile operators have committed to continue to improve their coverage in 2017:

- In 2014 the UK Government reached an agreement with the four mobile operators to improve mobile coverage. In this agreement, reflected in the operators’ licence obligations, each operator committed to provide voice coverage to 90% of the UK’s landmass by the end of 2017.¹³⁹
- O2 is required under the terms of the 4G licence it was awarded in 2013 to provide indoor coverage for mobile data to 98% of the population by the end of 2017. Other providers have indicated they will match this level of coverage over the same period.

Where consumers experience poor coverage, particularly in buildings, providers may offer various solutions, depending on the customer’s contract. All the mobile network operators now offer Wi-Fi

¹³⁷ Ofcom, *Connected Nations 2016*, December 2016

https://www.ofcom.org.uk/_data/assets/pdf_file/0035/95876/CN-Report-2016.pdf, p.36 figure 17

¹³⁸ Ofcom, *Connected Nations 2016*, December 2016, p. 40:

https://www.ofcom.org.uk/_data/assets/pdf_file/0035/95876/CN-Report-2016.pdf

¹³⁹ The signal levels used in the coverage measures we report in *Connected Nations* are based on Ofcom’s own field testing of the minimum mobile signal levels needed for a good consumer experience. These signal levels differ from those used in existing mobile operator licences, so even when these obligations are met at the end of 2017, the coverage levels we report may differ from the licence targets.

calling, which can be activated directly on newer smartphones or via the provider's app. There are also devices available from mobile providers to boost signal within the home using the customer's home broadband network.

Mobile signal in the home

- The location and characteristics of a property can affect the mobile signal available indoors. Thick walls, metal window frames, ceilings, pillars, or basement rooms can all impair coverage. Signal may also be blocked if the property is in the 'shadow' of a hill or large building.
- One way to overcome poor coverage in the home is **Wi-Fi calling and texts**. This service, offered by all the mobile operators, allows customers to make calls and send texts over a Wi-Fi network.
- The operators also offer **devices for the home** which can be bought or supplied by the operators to improve in-home signal (EE's Signal Box, O2's Boostbox, Three's Home Signal, Vodafone's Sure Signal). These work by connecting to a router and sending traffic over the broadband network to increase the mobile signal within homes and buildings.

Ofcom believes that more needs to be done for consumers experiencing poor coverage. We will work in 2017 to help improve mobile coverage by: ensuring that existing coverage obligations are met; considering targeted new obligations, where appropriate; and considering spectrum options to support connectivity on trains. Other measures we are working on include the development of new rules to allow the use of licence-exempt mobile repeaters to help consumers improve coverage in the home.

If mobile coverage is available, most people appear to experience good call quality

For most consumers, the ability to make and receive calls is still a key requirement of their mobile service.¹⁴⁰ Text messages, which are being used less frequently with the rise of instant messaging and social media, are also carried over voice networks.

The findings below are based on Ofcom's research via our testing for the *Smartphone Cities* report (where Ofcom testers compared the performance of mobile networks in UK cities) and our mobile research application (which uses a nationally representative panel of mobile customers and measures their experience of using mobile services using an app installed on their phone).

¹⁴⁰ In 2015 pay-monthly customers made 219 minutes of outgoing calls per month, with pay-as-you-go customers making 55 minutes' worth of calls. Ofcom, *Communications Market Report 2016*, August 2016, p. 168: https://www.ofcom.org.uk/_data/assets/pdf_file/0024/26826/cmr_uk_2016.pdf

These two sets of research measure different aspects of mobile performance (and in the case of the app, user behaviour) using different methodologies and over different time periods. Figure 37 highlights the key differences in methodology.

Figure 37: Differences between Ofcom’s mobile performance research methodologies

	Smartphone Cities ¹⁴¹	Mobile research app ¹⁴²
Objectives	Benchmark network performance and provide information to consumers on market level	Benchmark consumer experience and satisfaction, and provide information to consumers on market level
Methodology	Managed walk and drive testing	Passive monitoring of consumer research panel via an Android app
Geographic scope	Case studies in UK cities	Nationally representative
Latest test fieldwork	July - October 2016	September - December 2016

Our *Smartphone Cities* report provides a snapshot of mobile network performance in the UK cities where we carry out our testing.¹⁴³ As part of this, we measure voice call success rate, which is the proportion of calls successfully completed, compared with those that dropped within 90 seconds or failed to be set up at all. In our most recent research (with fieldwork between July and October 2016), the large majority of calls made in the tested cities were successful, with 99% of calls being completed on Vodafone and Three, 98% on EE and 97% on O2.¹⁴⁴

¹⁴¹ More information on the methodology used for our *Smartphone Cities* research is available at the [technical annex](#) of the December 2016 *Smartphone Cities report*.

¹⁴² More information on the methodology used for our mobile research app research is available at [annex 3](#) of this report.

¹⁴³ In our most recent fieldwork, these were: Belfast, Birmingham, Cardiff, Edinburgh, London, Sheffield and Southampton which we chose because they all had 4G coverage from each of the four operators. London was not included in our analysis of call success rates. Ofcom, *Smartphone Cities, Measuring 4G mobile broadband and voice performance*, December 2016:

https://www.ofcom.org.uk/_data/assets/pdf_file/0027/95904/Smartphone-Cities-Dec16.pdf

¹⁴⁴ *Smartphone Cities, Measuring 4G mobile broadband and voice performance*, p. 26

Figure 38: Call success rate (Smartphone Cities research; tested cities only - not nationally representative)

Provider	Completed	Dropped	Failed
EE	98%	1%	2%
O2	97%	1%	2%
Vodafone	99%	0%	1%
Three	99%	0%	1%

Source: Ofcom mobile broadband measurements, fieldwork July to October 2016. We used 4G SIMs that were uncapped on speed. In the case of EE, testing was carried out on an uncapped 4G EE tariff, but EE also offers tariffs which are capped in relation to speed. Vodafone, O2 and Three do not differentiate on speed, and so testing was carried out on standard 4G SIMs. Tariffs offered by each operator can change. Consumers need to check with each operator for up-to-date information.

Our mobile research app measures how many calls were dropped due to loss of service. As with the *Smartphone Cities* research, voice services had a very high success rate (over 99%) with few calls dropped before completion. There were no significant differences between operators.¹⁴⁵ Unlike our *Smartphone Cities* research, the app does not measure whether customers can make a call in the first place.

For our *Smartphone Cities* report, we also tested the quality of voice calls. On average, in the cities where we carried out our testing, the actual voice quality of calls was good.¹⁴⁶ With providers now offering high-definition voice calling, the quality levels are set to improve, with further innovation likely as providers implement 4G voice services.

The deployment of 4G networks is improving consumers’ experience of data services

Consumers’ ability to connect to internet applications and services is becoming more and more important. In 2016, 74% of adults with a mobile phone used data services on their mobile (up from 69% in 2015.)¹⁴⁷ Those who use mobile data are also using more of it, as video streaming and other

¹⁴⁵ Ofcom mobile research application 2016.

¹⁴⁶ Ofcom mobile broadband measurements, fieldwork July to October 2016. On average across operators the average was a ‘Mean Opinion Score’ of 4. Mean Opinion Score ranges from 1.0 (bad) to 5.0 (excellent), using ITU T P.863 POLQA (Perceptual Objective Listening Quality Assessment), an internationally recognised quality estimate of the quality in the voice (speech): <https://www.itu.int/rec/T-REC-P.863-201409-I/en>

¹⁴⁷ *Technology Tracker H2 2016*, table 32; Ofcom, *Technology Tracker H2 2015*, table 34: https://www.ofcom.org.uk/data/assets/pdf_file/0020/81425/ofcom_technology_tracker_half_2_2015_uk_data_tables.pdf

data-intensive applications become more popular. Average data use per mobile connection increased by 45% between June 2015 and June 2016.¹⁴⁸

Our research in UK cities indicates that where 4G data services are available, consumers should generally experience a high level of performance from their network provider. The websites tested (YouTube, BBC and Amazon) rarely failed to load, and typically took between one and five seconds. There were differences between providers; for example, in average download speed. Whether these differences are noticeable will depend on the behaviour and expectations of individual consumers.

Figure 39: Smartphone Cities 2016 key metrics scorecard (4G results)

	4G Web browsing speed						4G Download speed		Voice call
	Average speed			Successful loading			Average speed	Speeds over 2Mbit/s	Success rate
	BBC	Amazon	YouTube	BBC	Amazon	YouTube			
EE	4 seconds	2 seconds	1 second	99%	99%	100%	32Mbit/s	99%	98%
O2	5 seconds	2 seconds	1 second	97%	98%	99%	13Mbit/s	90%	97%
Three	4 seconds	2 seconds	1 second	98%	98%	99%	18Mbit/s	93%	99%
Vodafone	4 seconds	2 seconds	1 second	98%	98%	99%	18Mbit/s	95%	99%

Source: Ofcom mobile broadband measurements, fieldwork July to October 2016. Note: Average (mean for web browsing and median for download speed) of all tests gathered, with 4G as the best bearer. We used 4G SIMs that were uncapped on speed. In the case of EE testing was carried out on an uncapped 4G EE tariff, but EE also offers tariffs which are capped in relation to speed. Vodafone, O2 and Three do not differentiate on speed, and so testing was carried out on standard 4G SIMs. Tariffs offered by each operator can change. Consumers need to check with each operator for up-to-date information.¹⁴⁹

More than two-thirds of internet connections on mobile phones are made using Wi-Fi

Our mobile research app records the type of network that users connect to when actively using apps and transferring data. This information is collected on a second-by-second basis and provides an overall picture of the type of network mobile users are connecting to most frequently when using the internet during app sessions.

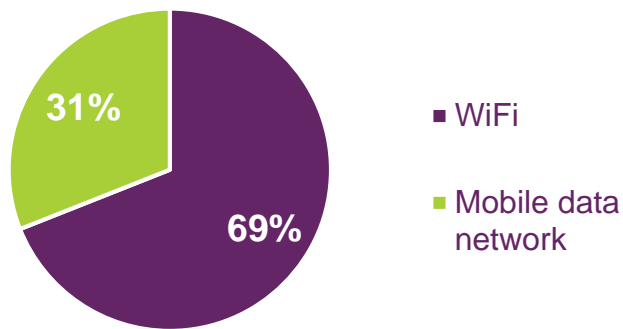
Notably, most connections do not use a cellular network, but connect using Wi-Fi. This enables consumers to retain their 3G and 4G data allowances for when they are outside the home or other Wi-Fi coverage areas.¹⁵⁰

¹⁴⁸ *Connected Nations 2016*, p. 45, figure 23

¹⁴⁹ *Smartphone Cities, Measuring 4G mobile broadband and voice performance*, p. 5

¹⁵⁰ Ofcom mobile research application 2016.

Figure 40: Data network share when using apps



Source: mobile research application, 4G panellists

The success rate of connecting to the network and downloading data is high among 4G users

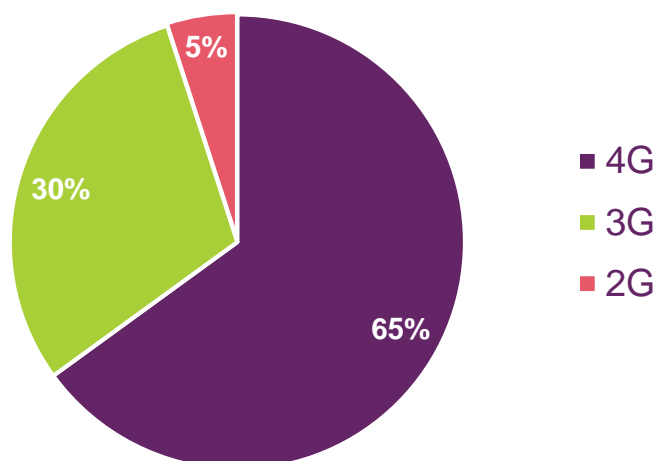
When users are connected to their mobile network rather than Wi-Fi, our mobile research app records whether they make a successful connection and download data. Every 15 minutes, an automated test is run in the background which attempts to download a small file and logs whether this can be done successfully. The research indicates that for 4G panellists, 96% of tests were successful.¹⁵¹

35% of mobile data connections by 4G customers were to 3G or 2G networks

As noted earlier, 4G coverage was lower than 3G coverage in 2016. As such, 4G customers may connect to 3G or 2G networks where a 4G signal is not available. This is likely to result in a lower-speed internet service. This may also occur when mobile providers manage traffic on their network by moving 4G customers onto 3G at peak times if the network is congested. Figure 41 indicates that when 4G customers were connected to a mobile data network (i.e. not via Wi-Fi) and using apps, 35% of the time they did not have a 4G data connection but were on 3G or 2G.

¹⁵¹ The results represent the success rate of the connection tests (every 15 min) for each network. Panellists were chosen so that they all have 4G services. Therefore, each time 4G is not available, the device will try to connect to 3G, and if 3G is not available, then 2G. The low success percentages of 2G do not actually represent poor 2G coverage; they represent the cases where 2G was available (or not) when neither of the other technologies (3G, 4G) were available. Similarly, the 3G % represents the cases where 3G was available when 4G wasn't.

Figure 41: Data network share when using apps



Source: mobile research application: 4G panellists

Losing access to mobile services can cause harm

With mobile voice and data services so important to many consumers, losing them can cause significant difficulties and inconvenience. While landline services and in-home solutions such as Wi-Fi calling might be a temporary solution for those who have them, they will not always be available outside the home.

Our research indicates that in the last 12 months around one in ten (8%) mobile users experienced a loss of service in an area where they would normally get good coverage.¹⁵² Service can be lost for a variety of reasons – from faulty handsets through to network problems such as mobile masts failing or operating at reduced capacity.

Mobile providers do not have in place systems and processes that routinely calculate how many of their customers lose service due to network failures.¹⁵³ We have therefore not been able to compare how frequently network outages affected the customers of the mobile providers covered in this report. Our analysis for our consultation on automatic compensation indicates that the vast majority (c.87%) of mast outages are fixed within 24 hours, but a significant minority of consumers experience loss of service for longer periods of time.¹⁵⁴

¹⁵² *Automatic compensation: Consumer experience of provisioning delays, loss of service and missed appointments*, p. 134

¹⁵³ In part this is because, typically, an outage on one mast will not affect a consumer if their handset can receive service from a different mast with overlapping coverage.

¹⁵⁴ Ofcom, *Automatic Compensation, Protecting consumers from quality of service problems*, March 2017, p. 115: https://www.ofcom.org.uk/data/assets/pdf_file/0030/98706/automatic-compensation-consultation.pdf

Mobile: customer service

Billing issues are a key area of concern for some mobile customers, and effective customer service is crucial in dealing with these

As noted above, the most common reasons customers had to complain about their mobile service in 2016 related to the service not performing as it should (42%) and billing, pricing and payment issues (33%).¹⁵⁵

Billing issues accounted for 38% of complaints to Ofcom about pay-monthly mobile services in 2016, compared to 15% of complaints about broadband services and 23% of complaints about landline phone services.¹⁵⁶ They were also the biggest driver of complaints to alternative dispute resolution schemes about mobile services in 2016. Billing issues may occur more often in relation to mobile services than other communications services because mobile bills are more likely to change month by month, and by larger amounts; for example, due to traveling abroad.

Ofcom requires communications providers to accurately bill customers for their usage.¹⁵⁷ If providers breach these requirements, Ofcom can investigate and issue a penalty. In 2016, Ofcom fined Vodafone £3.7m for its failure to credit pay-as-you-go customers' accounts between December 2013 and April 2015.¹⁵⁸ Ofcom also fined EE £2.7m for overcharging customers who contacted its customer service number while roaming in the EU.¹⁵⁹ In March 2017 Ofcom fined the landline and broadband provider Plusnet £880,000 for continuing to bill former landline and broadband customers who had cancelled their service.¹⁶⁰

In 2016 mobile customers waited less than half as long as landline and broadband customers, on average, to speak to their provider

Mobile customers have access to the same customer service channels as do landline and broadband customers, as described on page 26. Information on a mobile provider's website, apps or automated telephone systems can sometimes remove the need to contact a provider in the first place. For

¹⁵⁵ 42% of mobile customers with a reason to complain about their mobile service reported it was because the service was not performing as it should, 33% reported that it was because of billing, payment or pricing issues (see Figure 33).

¹⁵⁶ Ofcom complaints data.

¹⁵⁷ Ofcom regulates under General Condition 11: Metering and Billing. Regulated communications providers have a 'relevant turnover' in their most recent complete financial year exceeding £40m and must be signed up to an external approval body.

¹⁵⁸ <https://www.ofcom.org.uk/about-ofcom/latest/features-and-news/vodafone-fined-4.6-million>

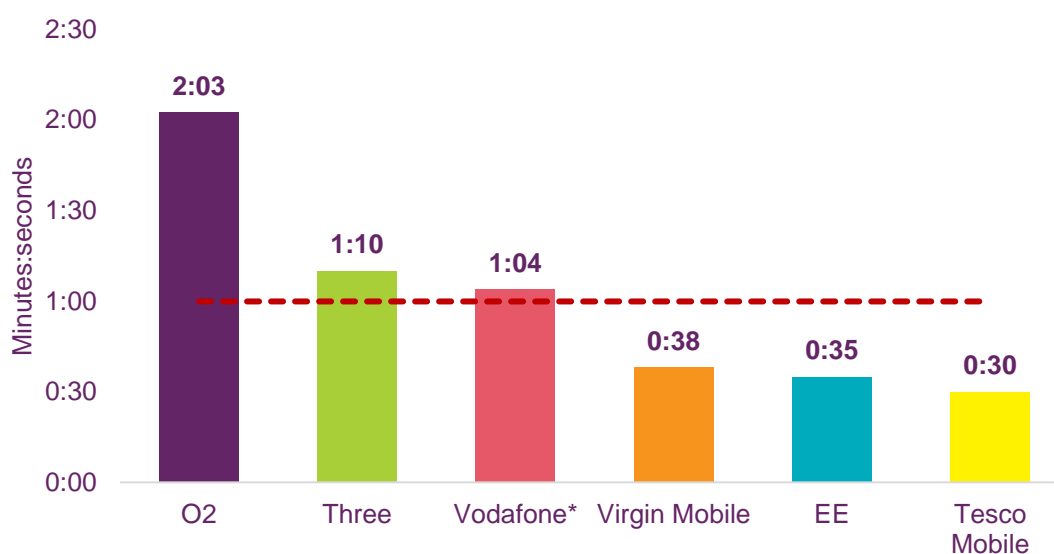
¹⁵⁹ <https://www.ofcom.org.uk/about-ofcom/latest/features-and-news/ee-fine>

¹⁶⁰ <https://www.ofcom.org.uk/about-ofcom/latest/media/media-releases/2017/plusnet-fined-880,000>

example, mobile customers can use their providers' online coverage checkers to see whether there are service problems in their area and how long these are likely to last.

Data supplied by providers show that most mobile customers used their phone when contacting their provider in 2016, accounting for 83% of contacts on average.¹⁶¹ Webchat accounted for 12% of contacts on average, emails and online contact forms 4%, and letters less than 1%.¹⁶² Some mobile providers also offer help in local stores, allowing customers to bring in their handsets to discuss problems face-to-face.

Figure 42: Average call waiting time, mobile providers (2016)



*Source: provider data. * Vodafone offered customers waiting in the call queue in 2016 the option to receive a call back, which may reduce call waiting times. Vodafone 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 (1 minute)*

In 2016 the average call waiting time for mobile providers was 1 minute, nearly 2 minutes shorter than for landline and broadband providers.¹⁶³ The provider with the longest overall call waiting time was O2, at 2 minutes 3 seconds, and the shortest was Tesco Mobile, at 30 seconds. Unlike for

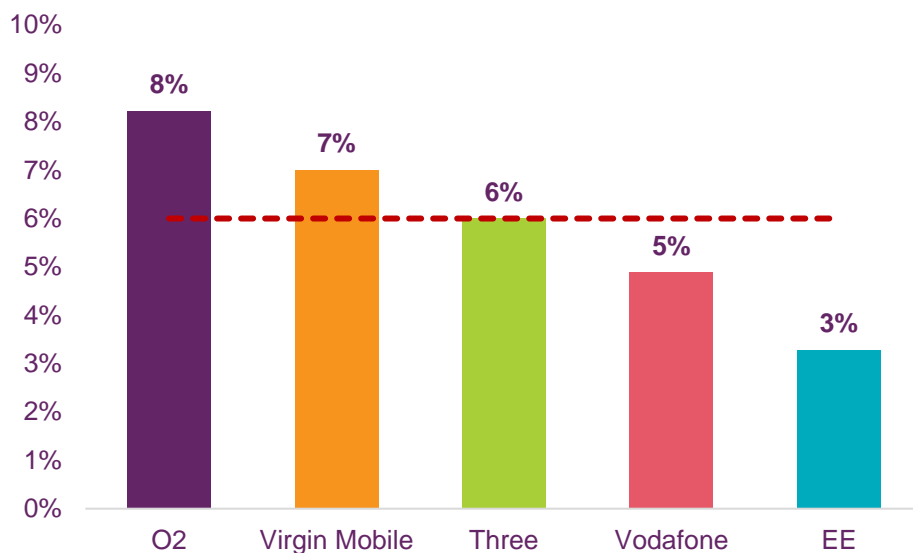
¹⁶¹ Ofcom analysis of provider data. More information on how Ofcom derived this and other metrics from provider data can be found at [annex 1](#).

¹⁶² All but one provider had 2% or fewer contacts by email or online contact form. One provider had a significantly higher contact rate, which increased the average to 4%.

¹⁶³ Ofcom analysis of provider data. Average call waiting time is the overall mean time, in seconds, that 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. The data provided is the overall average for calendar year 2016. It includes calls enquiring about new services and those reporting problems with existing services.

landline and broadband providers, the average difference between sales calls and other call types for mobile providers was very small.

Figure 43: Customer calls abandoned while waiting in the call queue, mobile providers (2016)



Source: provider data. Dotted line indicates average (6%)

The proportion of mobile customers hanging up before reaching an advisor was lower than for landline and broadband customers, corresponding with lower average call waiting time.¹⁶⁴ However, as noted above, not all customers leave the call queue because of the length of time they have been waiting; some customers may ‘abandon’ because they receive useful information through an automated message. This can reduce the effort required by customers and the time spent in the queue.

Vodafone customers were much more likely than customers of other mobile providers to complain to Ofcom

As noted above, only a small number of consumers with reason to complain choose to complain to Ofcom, but this can be indicative of poor service quality. There were fewer complaints per 100,000 subscribers made to Ofcom in 2016 concerning mobile services than about landline or broadband.

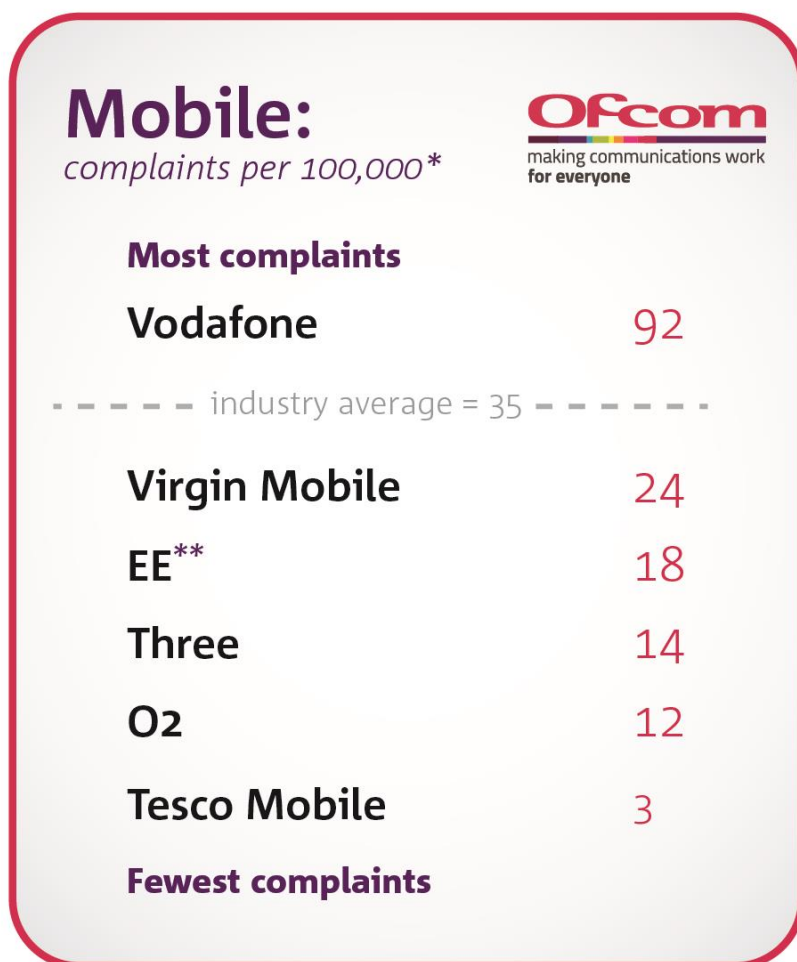
Each quarter [Ofcom reports on the complaints received by its Consumer Contact Centre](#). Below, we set out the complaints generated by each mobile provider for pay-monthly services, over the whole

¹⁶⁴ 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.

of 2016.¹⁶⁵ Ofcom receives significantly fewer complaints about pay-as-you-go mobile services and does not regularly report on these. Further information about how we compile our complaints data can be found in our most recent quarterly report publication.¹⁶⁶

In 2016 Vodafone generated the most pay-monthly mobile complaints to Ofcom per 100,000 subscribers (92) while Tesco Mobile generated the fewest (3).

Figure 44: Pay-monthly mobile complaints per 100,000 subscribers to Ofcom in 2016



*All figures rounded to nearest whole number apart from where they are less than 0.5.

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

¹⁶⁵ This information has been normalised using subscriber numbers as of June 2016.

¹⁶⁶ Ofcom, *Telecoms and Pay TV Complaints Q4 (October to December) 2016*, March 2017:

https://www.ofcom.org.uk/data/assets/pdf_file/0030/99471/Complaints-publication-Telecoms-and-Pay-TV-Complaints-Q4-2016.pdf

The quality of complaints handling varied considerably across mobile providers in 2016

Our consumer research into complaints and complaint handling found that mobile customers are less likely than broadband customers to have a reason to complain, and those who do have a reason are less likely to proceed to make a complaint (64% compared to 77% broadband).¹⁶⁷

However, among those who did complain to their mobile provider, there were low levels of satisfaction with how their complaints were handled. Our research found that in the second half of 2016 less than three in five (57%) mobile consumers were satisfied with how their complaint was handled.¹⁶⁸ This is lower than levels of overall satisfaction with complaint handling in the landline phone market (62%) but in line with the broadband market (56%).

Across mobile providers, satisfaction with some specific aspects of complaints handling was also low. For example, although the average waiting time for customer service calls to mobile providers is significantly lower than to landline phone and broadband providers, only 54% of customers were satisfied with the ease of getting through to the right person on the phone.¹⁶⁹ As noted above, the Institute of Customer Service found that the telecoms and media sector overall performed below most other sectors for complaints handling in 2016.

There were differences between mobile providers in their customers' level of satisfaction with complaints handling. As shown in Figure 45 below, Tesco Mobile (74%) performed above the sector average for overall satisfaction with how complaints were handled, and Vodafone (46%) below average. Unsurprisingly, overall satisfaction with complaint handling, among those whose complaint was completely resolved at the time of the research (78%), was higher than among those whose complaints were not completely resolved (28%).

Tesco Mobile performed above the mobile sector average for seven of the nine specific aspects of customer service measured. Vodafone performed below the market average for all nine specific aspects of customer service measured.

¹⁶⁷ Ofcom, Reason to complain research, April 2017, https://www.ofcom.org.uk/data/assets/pdf_file/0016/100609/reason-complain-research-2016.pdf

¹⁶⁸ Ofcom, *Quality of customer service research*, April 2017 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. More details can be found in the research annex.

¹⁶⁹ Among those who contacted their provider over the phone.

Figure 45: Mobile - overall satisfaction and satisfaction with specific aspects of customer service measured

	Total mobile	EE/ Orange/ T-Mobile	O2	Tesco Mobile	Three	Virgin Mobile	Vodafone
Overall satisfaction with service you received over this complaint - % satisfied	57%	57%	60%	74%	60%	60%	46%
% Satisfied with specific aspects of customer service measured:							
Ease of finding provider contact details	65%	62%	67%	69%	70%	72%	60%
Ease of getting through to the right person (PHONE) ¹	54%	55%	57%	66%	62%	50%	43%
Time taken to handle your issue	58%	58%	64%	78%	58%	62%	44%
Getting the issue resolved to your satisfaction	59%	59%	66%	80%	59%	59%	45%
Courtesy and politeness of advisors	67%	69%	69%	65%	65%	71%	61%
Advisor doing what they said they would do	61%	63%	65%	67%	63%	64%	50%
Logging of query details to avoid having to repeat yourself	57%	55%	64%	72%	58%	63%	45%
Offering compensation or a goodwill payment	51%	46%	57%	74%	49%	62%	42%
Willingness to help resolve your issue	63%	62%	67%	81%	65%	65%	52%

Source: Ofcom Quality of customer service – complaints research, online survey, fieldwork carried out by BDRG Continental, December 2016/January 2017

Base: All who complained about mobile phone service in past six months (2989), EE/Orange/T-Mobile (666), O2 (729), Tesco Mobile (327), Three (500), Virgin Mobile (258), Vodafone (509)

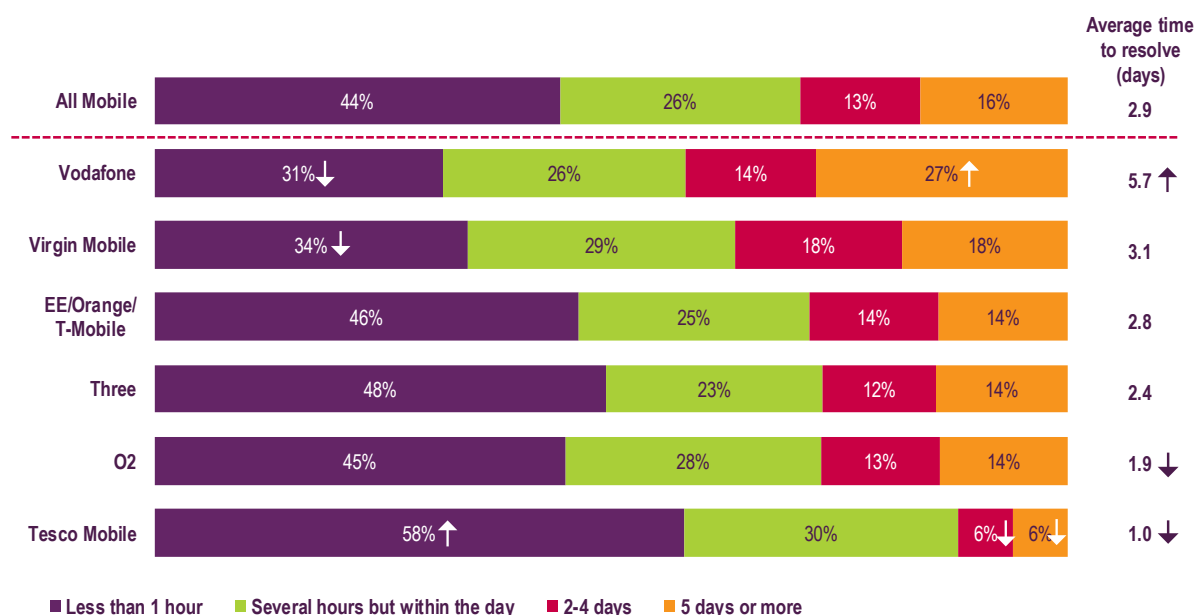
Base: All contacting by phone (1490/373/295/128/270/139/285)

Red or green text indicates significantly higher/lower than the sector average at the 95% confidence level.

Tesco Mobile customers were more likely than the mobile sector average to report that their complaint had been resolved in under an hour

Among those whose complaint had been completely resolved, Vodafone and Virgin Media consumers were less likely to report their complaint had been resolved in under an hour, compared to the market average. Vodafone customers were also more likely to report that their complaint took five days or more to be resolved.

Figure 46: Mobile - 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 mobile phone service in past six months whose issue was completely resolved – All (1758), EE/Orange/T-Mobile (370), O2 (457), Tesco Mobile (264), Three (266), Virgin Mobile (153), Vodafone (248)

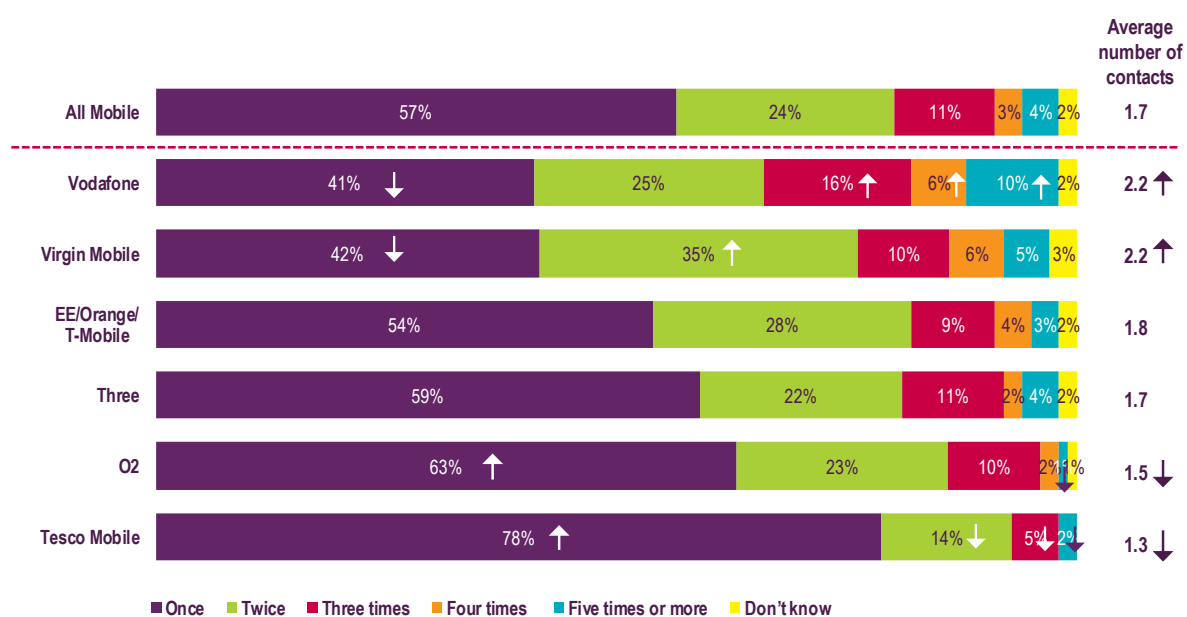
Arrows indicates significantly higher/lower than the sector average at the 95% confidence level.

Tesco Mobile and O2 customers were more likely than the mobile sector average to report just one contact to completely resolve their complaint

On average, mobile complaints that were completely resolved took just under 2 contacts (1.7) to resolve. Three per cent of completely resolved complaints took four contacts to resolve, and 4% took five contacts or more.

The average number of contacts required to completely resolve a complaint was higher than the sector overall for Vodafone and Virgin Mobile, and lower for Tesco Mobile and O2.

Figure 47: Mobile - number of contacts with provider needed 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 mobile phone service in past six months whose issue was completely resolved – All (1758), EE/Orange/T-Mobile (370), O2 (457), Tesco Mobile (264), Three (266), Virgin Mobile (153), Vodafone (248)

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

The two ADR schemes that Ofcom approves, CISAS and OS, have released data on the subject matter of the complaints they received between October and December 2016, relating to pay-monthly mobile service providers. That data can be found on their respective websites: [CISAS](#) and [OS](#).

In relation to mobile services, the main complaint drivers over the period were billing and contract issues. Figure 48 shows the most common types of complaint made to ADR schemes in relation to each of the largest providers.

Figure 48: Most common types of complaints made to ADR schemes (October - December 2016), mobile providers¹⁷⁰

	Most common	Second most common
EE	Billing (33%)	Contract issues (22%)
Telefonica (including O2)	Billing (33%)	Customer service (19%)
Tesco Mobile	Service quality ¹⁷¹ (27%)	Contract issues (23%)
Three	Billing (24%)	Service quality (22%)
Vodafone	Billing (53%)	Contract issues (18%)

Source: Ombudsman Services (Communications); CISAS

Community-based customer service

Some mobile providers are innovating in how they provide customer service. One example is the use of community forums that incentivise customers to help each other find solutions to problems, often through a reward system offering discounts, vouchers or prizes.

This approach allows giffgaff, for example, to help customers without having a traditional call centre. An email response service is provided for issues that cannot be resolved through the community forum. While we have not reported on giffgaff's performance in this report, due to its size, it was the highest-scoring telecoms and media provider in the Institute of Customer Service 2016 Satisfaction Index, and the only telecoms company to feature in the top ten of KPMG Nunwood's 2016 UK Customer Experience Excellence Analysis.

¹⁷⁰ This data also includes ADR complaints to the landline and broadband customers of these providers, where relevant.

¹⁷¹ 'Service quality' complaints include, for example, those relating to loss of service, network coverage, disconnections or download speeds.