Technical report – Customer Satisfaction Tracker 2021 (Nov-Dec)

Preface

Since 2010, Ofcom has been tracking levels of customer satisfaction among users of telecommunications services; and, since 2017, this has been carried out via the Customer Satisfaction Tracker ("CST"). In previous waves of the CST the data was collected through an initial face-to-face study, followed by a smaller online survey. The primary aim of the online study was to increase the number of interviews achieved with customers of communications providers (with a market share of at least 4%) where fewer than 100 interviews were achieved on the initial face-to-face study. Prior to 2020, the research was conducted via a face to face omnibus. However due to the coronavirus pandemic, restrictions on face-to-face interviewing were put in place which has meant that an online methodology has been used since November 2020. More information on the previous wave's approach and methodology is available on Ofcom's website.

Data Comparability and Limitations

Whilst the YonderLive panel has been carefully built to ensure that it remains demographically balanced, this survey does not capture the views of the offline population who do not have access to the internet and therefore results are skewed to those who are online.

It is also important to acknowledge any potential behavioural differences that a respondent might exhibit when completing a survey face to face versus completing a survey online. In particular, it is known that online panels can result in fewer responses in the top satisfaction/ agreement category.

Due to the change in methodology in 2020 (from face to face to online) we cannot compare these data to those from waves prior to 2020. However, data from this wave can be compared to that from 2020.

Study Objectives

This wave of the CST is run by Yonder Consulting on behalf of Ofcom. The objective of the survey is to track and understand the attitudes of residential consumers to the quality of service they receive for each specific telecommunications service or product they are a decision maker for within the household. It focuses specifically on levels of satisfaction with aspects of their service across the four key communication markets (landline, mobile, fixed broadband and pay TV). The study is designed to report on satisfaction at an overall level per market and by provider within market, where a provider has a market share of at least 4%.

In the current study, Yonder interviewed a quota sample of 2,687 adults adults aged 16+ via it's own online research panel. The online interviews consisted of 2,559 'main sample' interviews and 128 'boost' interviews. The 'boost' interviews, were conducted with customers of those providers where fewer than 100 interviews were achieved in the initial round of 'main sample' surveys.

All interviews were conducted over a two-week period between the 29th of November and the 14th December 2021.

Questions were asked upfront to establish household ownership of landline, mobile phone, fixed broadband and pay TV. For each of these services the questionnaire established that the respondent is the decision maker for that service and also whether any of the households' communications services are taken from the same provider. Analysis was conducted by each total market i.e. fixed line, mobile, fixed broadband, pay TV and those purchasing services as a bundle. On completion of the interviews, weighting was applied for each market section (i.e. each of the above markets) of the survey using profiles from Ofcom's Technology Tracker Survey.

Details of the sampling frame, research methodology, and weighting procedures are outlined in the following pages. A note on statistical reliability is also included in the final section of this document.

Sample Design

Quotas

Nationally representrative quotas were used in the current study to closely represent the UK population. Quotas were set using 2019 PAMCO data for Great Britain and Northern Ireland. PAMCO 2019 was also used to inform weighting – more information on this is provided in the weighting section of this document.

- Age (16-24, 25-34, 35-44, 45-54, 55-64, 65+)
- Socio-economic grade (SEG)
- Gender

Fieldwork

An online survey was conducted using Yonder's online panel (YonderLive) to reach adults aged 16+. YonderLive is made up of 150,000 members across the UK. For the 'main sample' online interviews with interlocking quotas were set to be broadly representative of UK internet users based on gender within age bands; with further quotas set based on household socio-economic group and nation. For the 'boost' interviews no specific quotas were set. The criteria for inclusion for these 'boost' interviews was being a customer of any service provider, typically from one of the smaller communications providers, where fewer than 100 interviews had been conducted in the initial 'main sample' survey's. These providers were:

- Landline: EE
- Broadband: EE, Vodafone
- Pay TV: TalkTalk

Weighting

The data from the 'main sample' and 'boost' online surveys has been combined and weighted in total. The weighting plan is to weight to targets by age, gender, and SEG to a nationally representative scheme of the UK population. Any discrepancy between the final achieved sample and the known offline profile of the UK was adjusted by RIM[1] weighting, using the known demographic profile of the population. The current study used PAMCO 2019 to weight these demographics – this is a widely used population data source employed by many research agencies to provide more up-to-date demographic proportions of the UK population than the 2011 census. Market share data was also used to weight services used by market (i.e. Landline, Mobile, Fixed broadband, and Pay TV) and by communication providers–with 4% or more market share. All other communication provides with a market share of less than 4% or that were spontaneously mentioned by participants were combined to create an "other communication providers" variable per market.

The overall weighting was extremely efficient with the relationship between effective and unweighted samples at 76% for all four services.

[1]Random Iterative Method. RIM weighting is a form of survey weighing to accurately showcase demographics among a population or customer base. RIM weighting allows each variable and question to be weighed as an individual entity to assure each data point and demographic is accurately represented. Rim weighting is used when there are a number of weighting variables but the inter-relationship between them is not know. It tries to change the weights of each weighting variable as little as possible while interpolating these relationships.

Guide to Statistical Reliability

The variation between the sample results and the "true" values (the findings that would have been obtained if every telecoms customer had been interviewed) can be predicted from the sample sizes on which the results are based, and on the number of times that a particular answer is given. The confidence with which

we can make this prediction is usually chosen to be 95%, that is, the chances are 95 in 100 that the “true” values will fall within a specified range. However, as the sample is weighted, we need to use the effective sample size[1] (ESS) rather than actual sample size to judge the accuracy of results. The following table compares ESS and actual samples for some of the main groups across all respondents.

1 Effective Sample Size shown as Effective Weighted Sample in the data tables produced

	ACTUAL	ESS
TOTAL	2687	2687
GENDER: Male	1313	1305
GENDER: Female	1357	1365
AGE: 16-17	15	82
AGE: 18-24	305	278
AGE: 25-34	437	446
AGE: 35-44	441	416
AGE: 45-54	461	446
AGE: 55-64	417	405
AGE: 65+	611	615
SEG: AB	713	709
SEG: C1	714	795
SEG: C2	579	545
SEG: DE	681	637