



Automatic compensation :
Consumer experience of provisioning delays, loss of
service and missed appointments

Presentation of Quantitative Findings

16th March, 2017



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Background, objectives & approach

Background

Two of Ofcom's current projects relate to service quality across the supply chains for fixed and mobile communications

*The **Automatic Compensation project** focuses on retail communications providers for both fixed and mobile communications. The project is considering whether to require retail CPs to pay residential consumers and SMEs automatic compensation when service quality problems occur that affect fixed or mobile services. If so, the project will consider at what value compensation should be set. Research with Consumers and SMEs was needed to feed into both of these projects, the objectives of which are detailed overleaf*

*The **Quality of Fixed Networks (QoFN) project** focuses on quality of service within the fixed voice and broadband wholesale market. This project is exploring issues such as whether the standards set by Ofcom meet consumers and businesses' needs and expectations, how to regulate the service quality that Openreach delivers to retail communications providers and how Ofcom may require Openreach to provide better service where this will deliver better value to end users.*

Research with Consumers and SMEs was needed to feed into both of these projects, the objectives of which are detailed overleaf

****NB: Ofcom already sets regulated minimum standards for Openreach for the timely completion of repairs and installations****

Objectives

1

Consumer & SME expectations of standards of service quality for fixed & mobile services

- Expectations of service reliability and understand what constitutes ‘reliable’
- Experiences and expectations around service faults/outages
 - Frequency of service faults and the nature of these
 - Experiences of getting a repair? What are expectations/priorities?
- Experiences and expectations around new service installations

2

Impact/harm/detriment caused by Quality of Service issues for fixed & mobile services

- QoS problems experienced and the frequency of these
- Length of time to resolve and satisfaction with this
- Detriment experienced
- Action taken to mitigate the problem and associated costs
- Experiences, expectations and satisfaction around compensation
- Possible mitigating actions that could be taken by the retail CP
- Willingness to pay to avoid QoS problems in the future

3

Willingness to pay for incrementally better service for fixed & mobile services

- How do users balance price and service quality?
- Willingness to pay for incrementally better service above baseline expectations?
- Willingness to accept lower levels of service in return for a lower price?

Approach

Consumers - In home CAPI interviews

We spoke to a nationally and regionally representative sample of 2,088 adults across the UK. Random location interviewing was used to ensure a good geographical spread. Controls were applied by region and sub-region, then quotas were set on age, gender, working status and tenure. *Note: The mobile phone questions were taken from a similar earlier study**

SMEs - CATI interviews

We spoke to 1,006 telecoms decision makers across the UK. An interlocking quota sample based on country/region and size was implemented. In addition to controlling the sample this way, non-interlocking quotas were set on industry sector to ensure broad alignment with UK business profiles. *Note: The mobile phone questions were merged with those from an earlier study in order to boost the total number of mobile phone ‘loss of service’ interviews*.*

Screening: All respondents were responsible for telecoms approach, policy and purchasing - covering the day to day processes, as well as the decision making

Weighting: In both cases, our final data has been weighted in order to align it to the sample profile of each universe

Timing: Interviews were undertaken between 16th December, 2016 and 27th January, 2017. **The earlier interviews took place between 25th August and 28th September, 2016*





Automatic compensation :
Consumer experience of provisioning delays, loss of
service and missed appointments

Fixed Line Research:
Consumers



Fixed line research: Consumer executive summary (1)

- ❑ Overall, consumers have a **greater reliance on broadband and mobile** than Landline
 - 2 in 3 say their HH would struggle to function without these vs 1 in 4 for landline
- ❑ **Price is the dominant factor in the choice of provider.**
 - Broadband speed (35%) and reliability (30%) are also key for internet
 - Bundling is important to 1 in 3, in relation to both landline (33%) and internet (29%)
- ❑ **Two fifths (41%) have switched any fixed line service in the past 5 years**
 - 27% have switched both, 11% broadband (only) and 4% landline (only)  
- ❑ **A quarter (24%) have experienced a complete loss (*for more than one hour, within the last 2 years*) of their fixed line service, whilst 1 in 20 (5%) have experienced a LoS during provisioning or upgrading**
 - On average, the complete LoS lasted **3.5 days** and the provisioning/upgrading LoS **1.9 days**
- ❑ **Three quarters (77%) reported their LoS to their provider**
 - Overall, they waited 12 hours before doing so and their service was restored after 4.3 days
- ❑ **Just over half (54%) are satisfied with their providers ability to resolve the LoS**
 - They become increasingly dissatisfied after waiting **3 days** for their restoration
 <1day = 76% satisfied, 1-3 days = 65% satisfied, 4+ days = 13% satisfied

Fixed line research: Consumer executive summary (2)

- ❑ **Three fifths (58%)** feel their LoS had a **negative impact** on their HH generally
- ❑ Only **7%** received compensation for their LoS, with **3%** asking for it. Of those that did not receive compensation, **7%** asked for it and **88%** did not (**5%** didn't know)
- ❑ After probing, **30%** of consumers **expect to be compensated** for the impact of their LoS. On average, they expect **£35** - to be paid as a credit on their account or cash
- ❑ **1 in 10 (8%)** changed supplier as a **direct result of their LoS**. Similar proportions are actively looking to change (**7%**), wanted to change, but stayed as they were within their minimum contact period (**7%**) or stayed for other reasons (**6%**)

Fixed line research: Consumer executive summary (3)

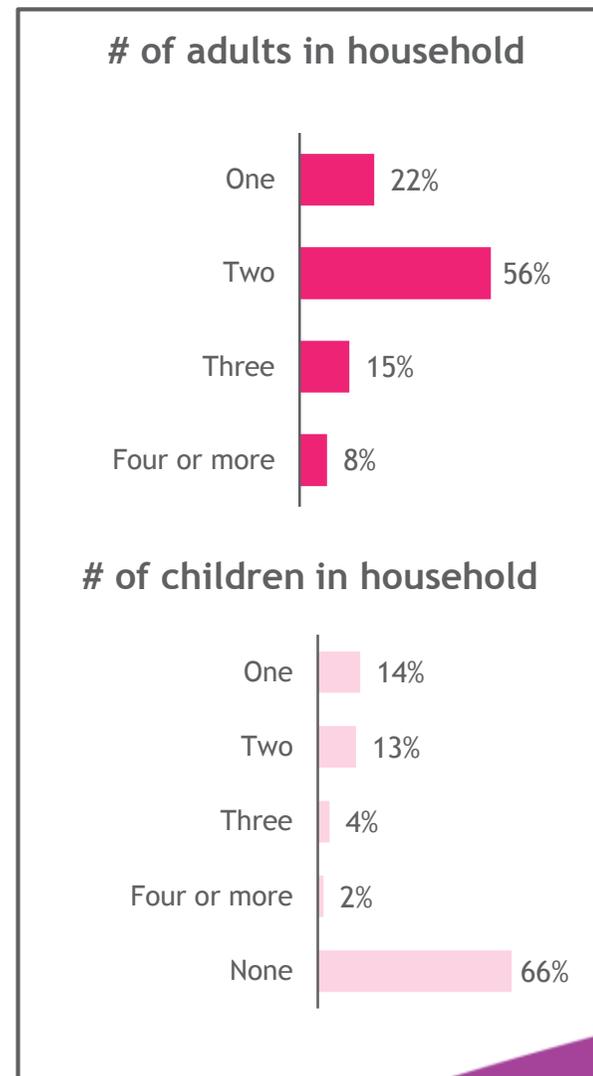
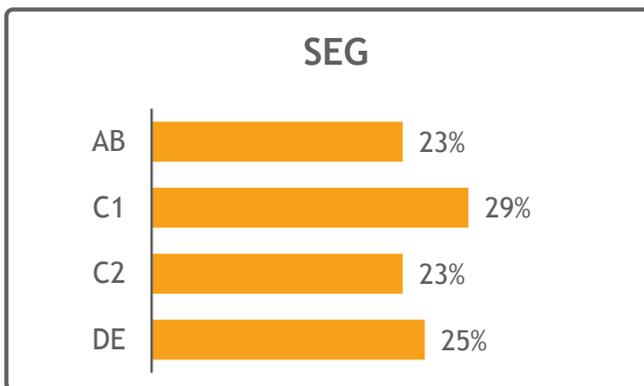
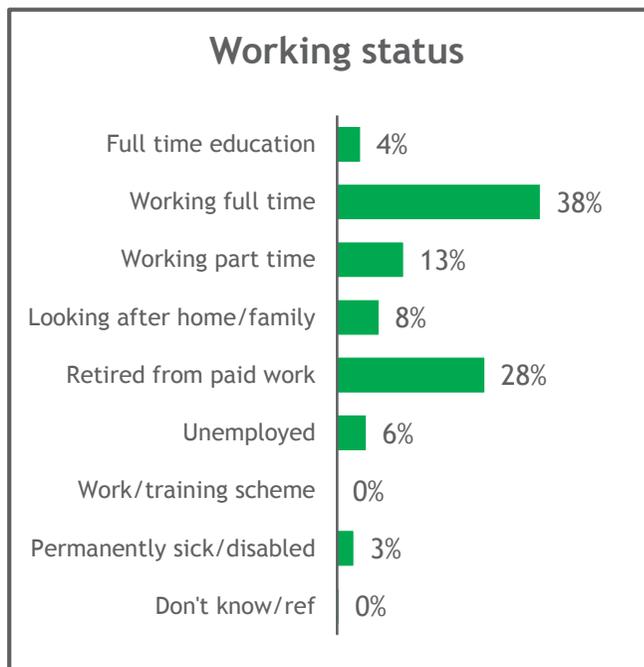
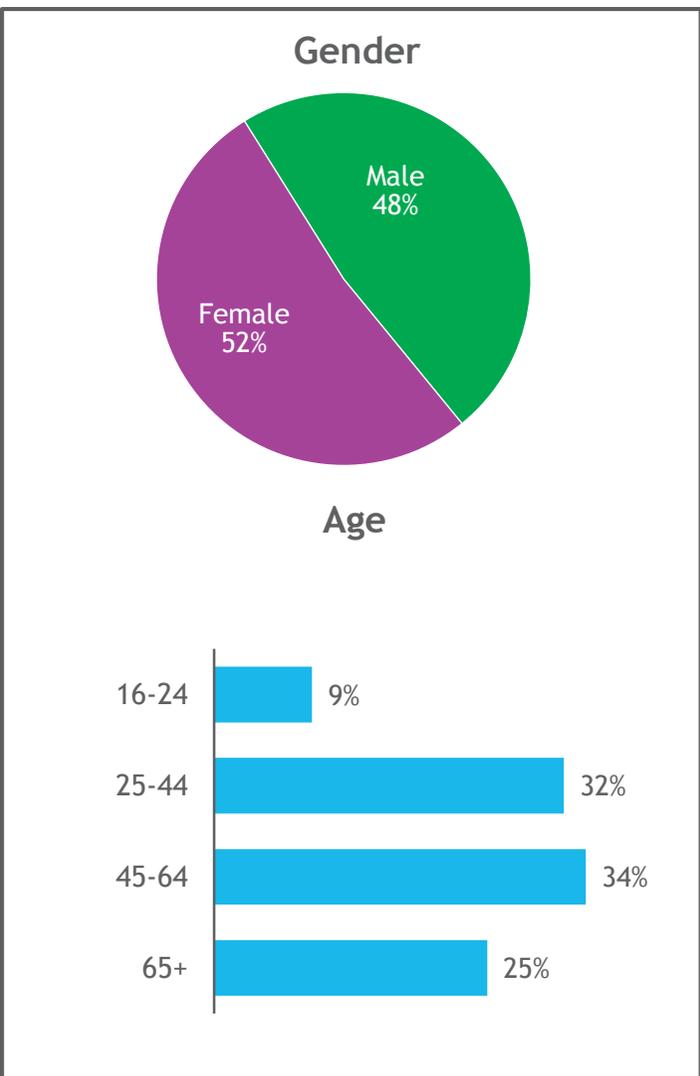
- ❑ 1 in 4 (27%) of those experiencing a LoS waited in for an engineer visit, with 1 in 10 taking time off
- ❑ On average, 1½ days is considered reasonable notice for an amendment to an engineer appointment
- ❑ 4% have ever experienced a missed appointment, with 3% doing so in the last 2 years
 - On average, they spend 2 hours waiting for an engineer
 - On average, they spend 3 hours trying to set up another appointment
 - 3 in 4 contact their provider. All used the phone. On average, they contacted their provider 3 times
- ❑ Only 8% received compensation for their missed appointment, with 4% asking for it. Of those that did not receive compensation, 15% asked for it and 79% did not (4% didn't know)
- ❑ After probing, 41% of consumers expect to be compensated. On average, they expect c£50 - to be paid as a credit on their account or cash

Section 1

Demographics, Services used

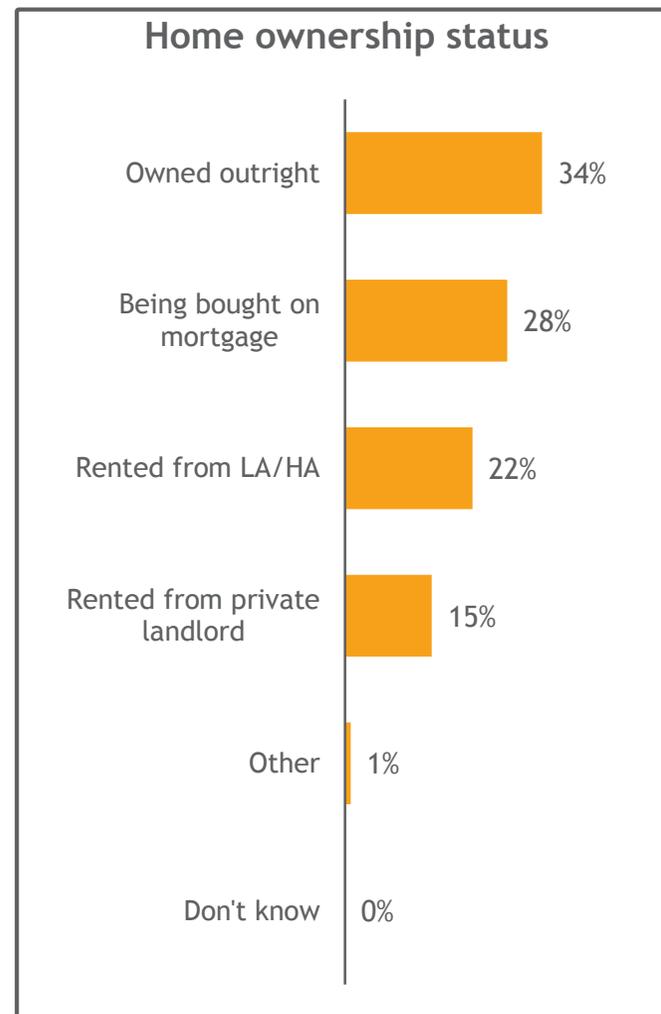
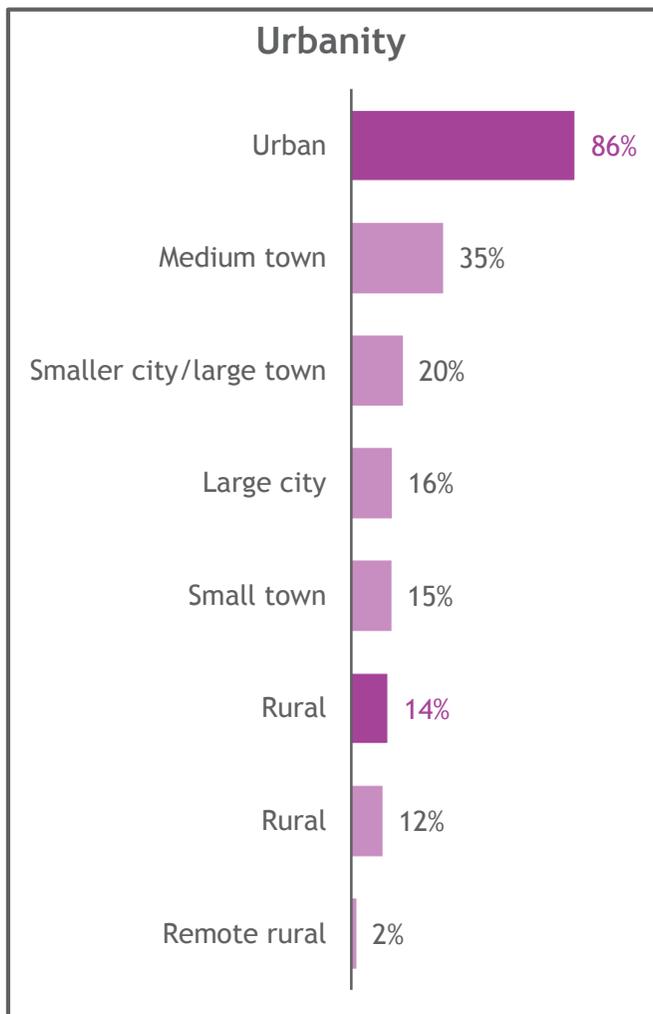
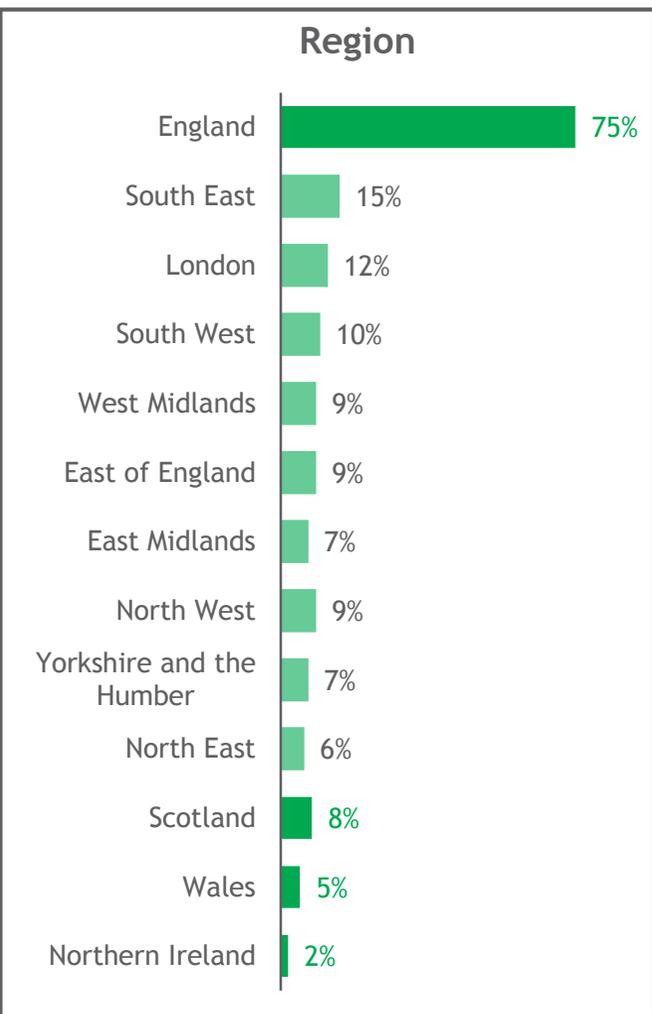
Key sample criteria: Gender, age, working status, SEG, HH composition

Demographics



Key sample criteria: Country/region, urbanity and HH ownership

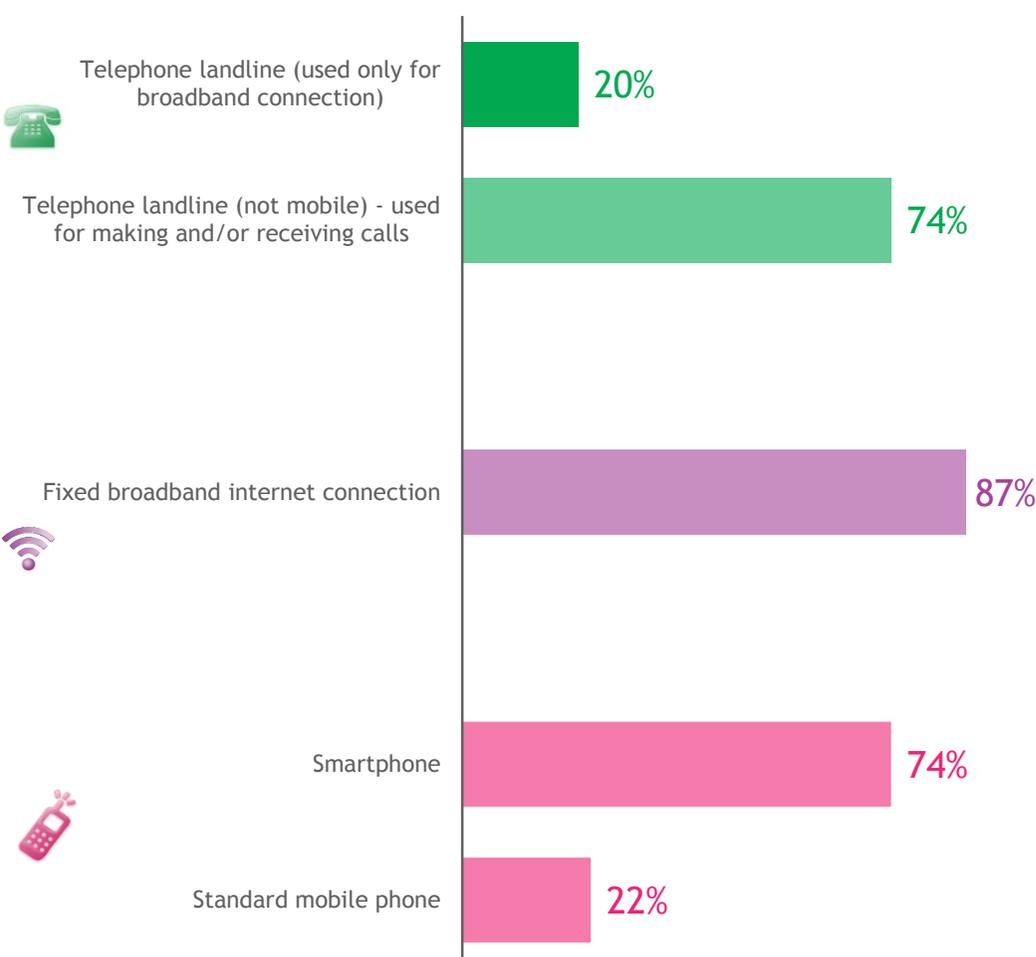
Location



Almost 9 in 10 have fixed broadband. Three quarters have smartphones (correlated with younger age) or use telephone landlines for making/receiving calls (correlated with older age)

Communication services currently used

Consumer



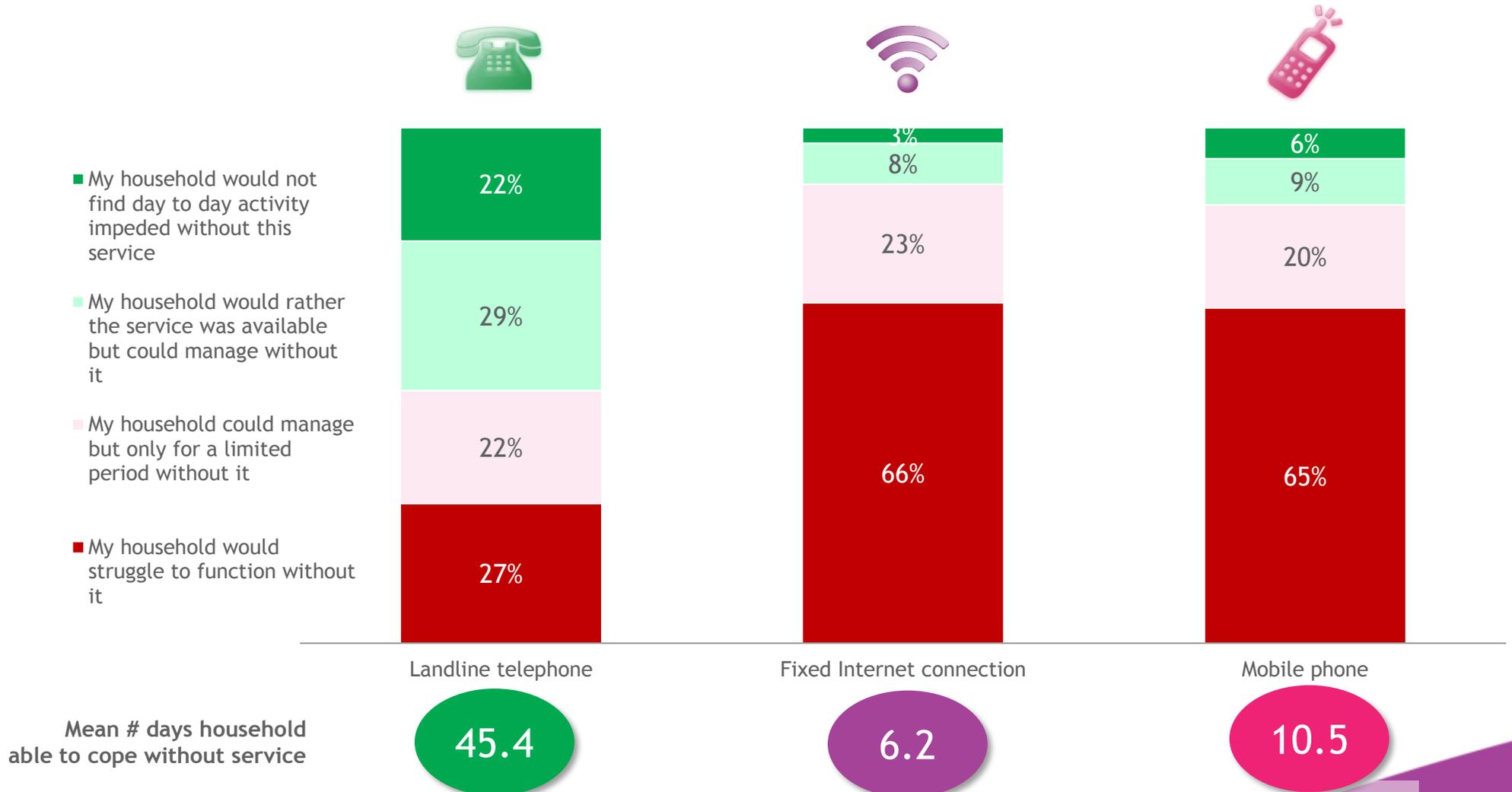
	AGE				SEG		Urbanity	
	16-24	25-44	45-64	65+	ABC1	C2DE	Urban	Rural
	199	682	702	505	1053	1035	1904	184
Telephone landline (used only for broadband connection)	27%	29%	18%	7%	18%	21%	21%	10%
Telephone landline (not mobile) - used for making and/or receiving calls	54%	61%	78%	92%	75%	72%	72%	87%
Fixed broadband internet connection	91%	95%	94%	66%	93%	81%	87%	86%
Smartphone	97%	92%	80%	35%	81%	67%	75%	68%
Standard mobile phone	6%	8%	21%	48%	19%	25%	21%	28%

Section 2

Reliance on Services, Switching behaviour

Greater reliance on Internet and Mobile than Landline. Two-thirds say household would “struggle to function” without these. Households feel they could cope just under a week without Internet (much longer for landline).

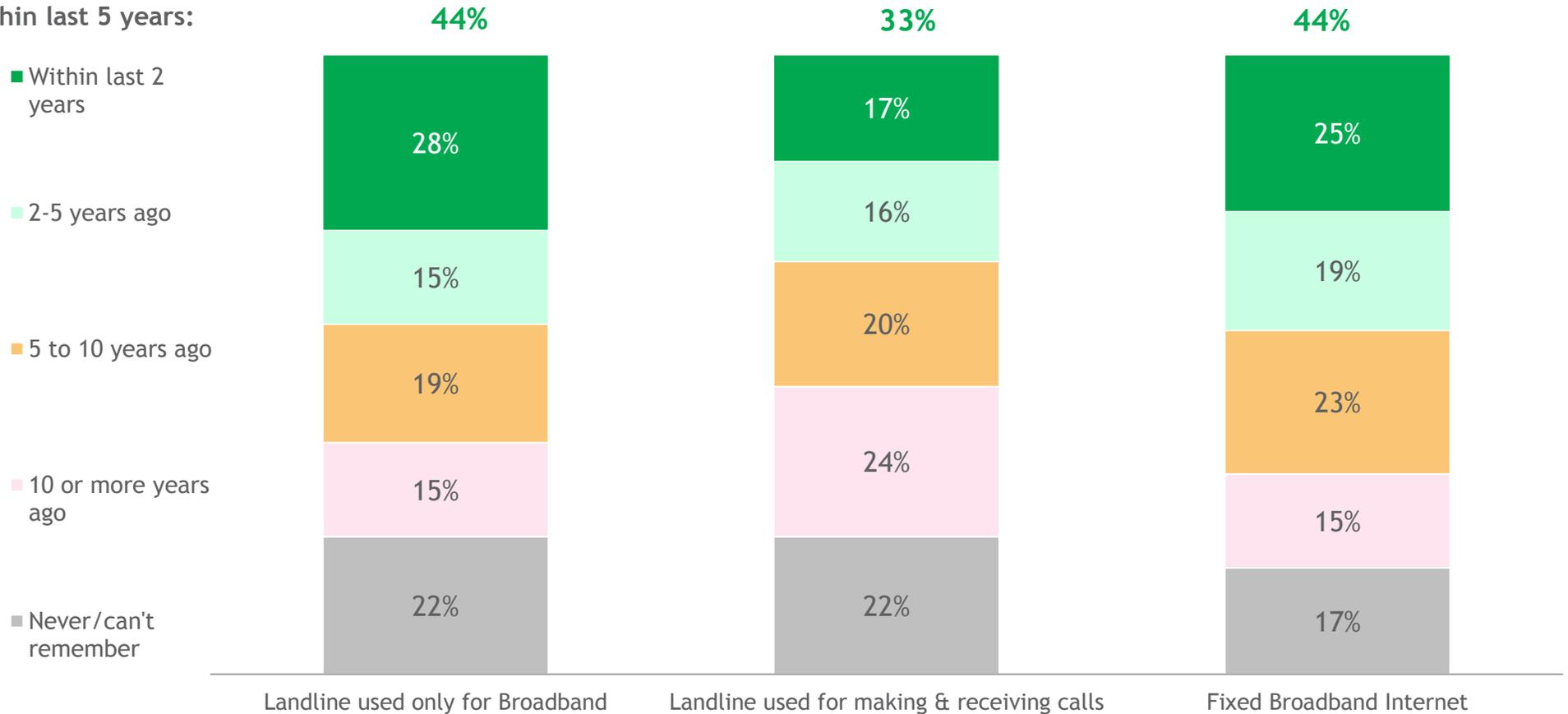
Importance of telecoms services currently used



Internet likely to have been changed/upgraded more recently than landline for calls. More than a quarter have changed/upgraded broadband services within the past 2 years.

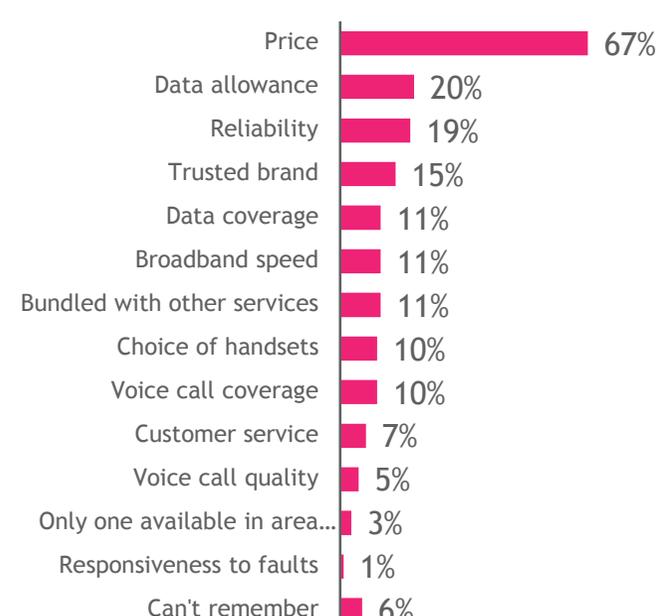
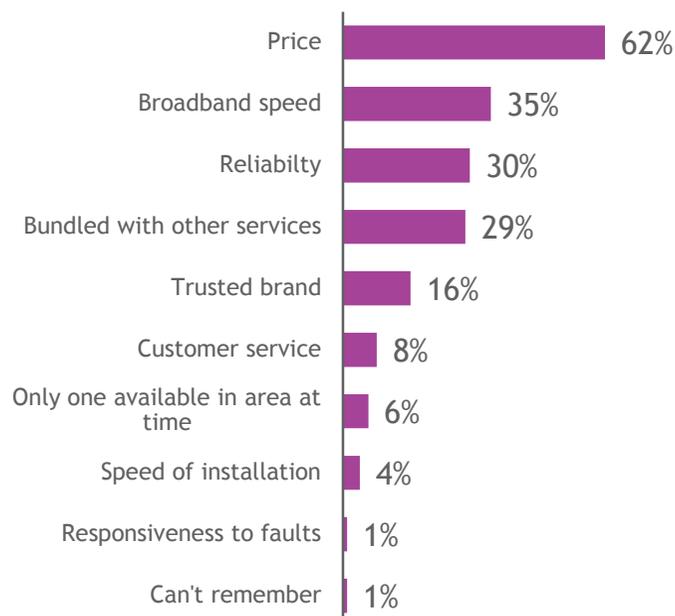
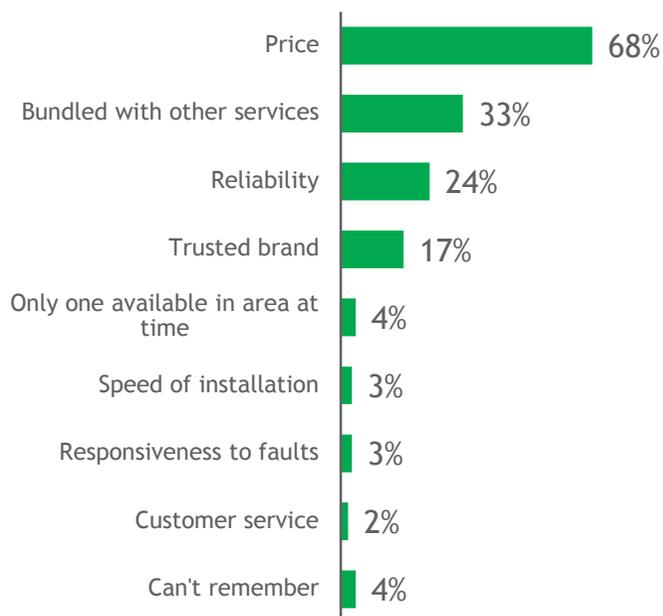
When last changed supplier or upgraded existing service

Within last 5 years:



Price is the dominant factor in choice of provider across services. With Internet, Broadband speed and reliability are key for around a third. Bundling is important for some in relation to Landline and Broadband (most likely bundled together)

Main factors that influenced choice of provider (unprompted)



C2a/b/c. Thinking back to when you chose your (service), what were the main factors that influenced your choice of provider?

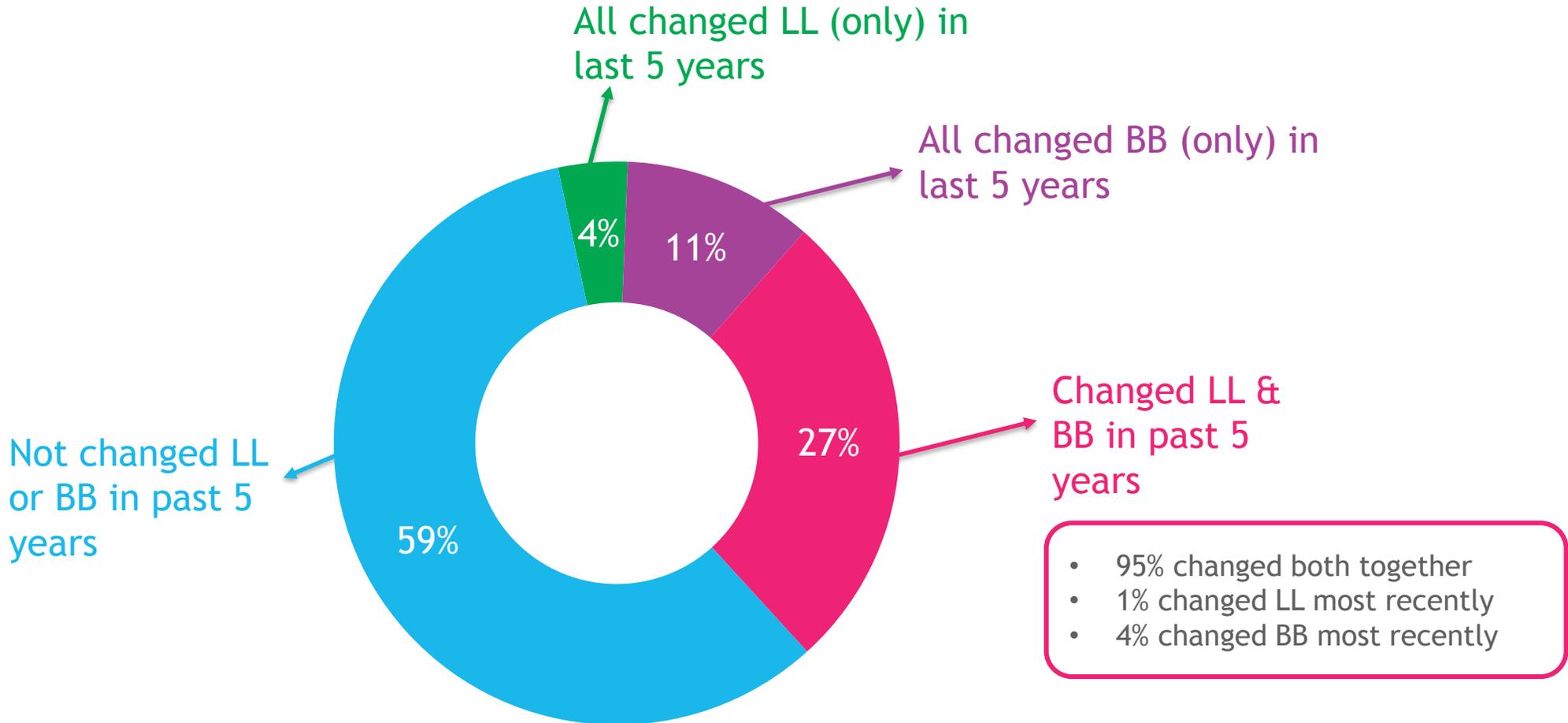
Base: All Consumers that have a landline but no fixed broadband and changed their provider in the last 10 years n=96, all that have a fixed broadband connection and changed their provider in the last 10 years n=1479, all with a mobile service n=1931

Section 3

Experience of and impact of loss of service/delayed provisioning

Two-fifths (41%) have switched any of landline or broadband in the past 5 years

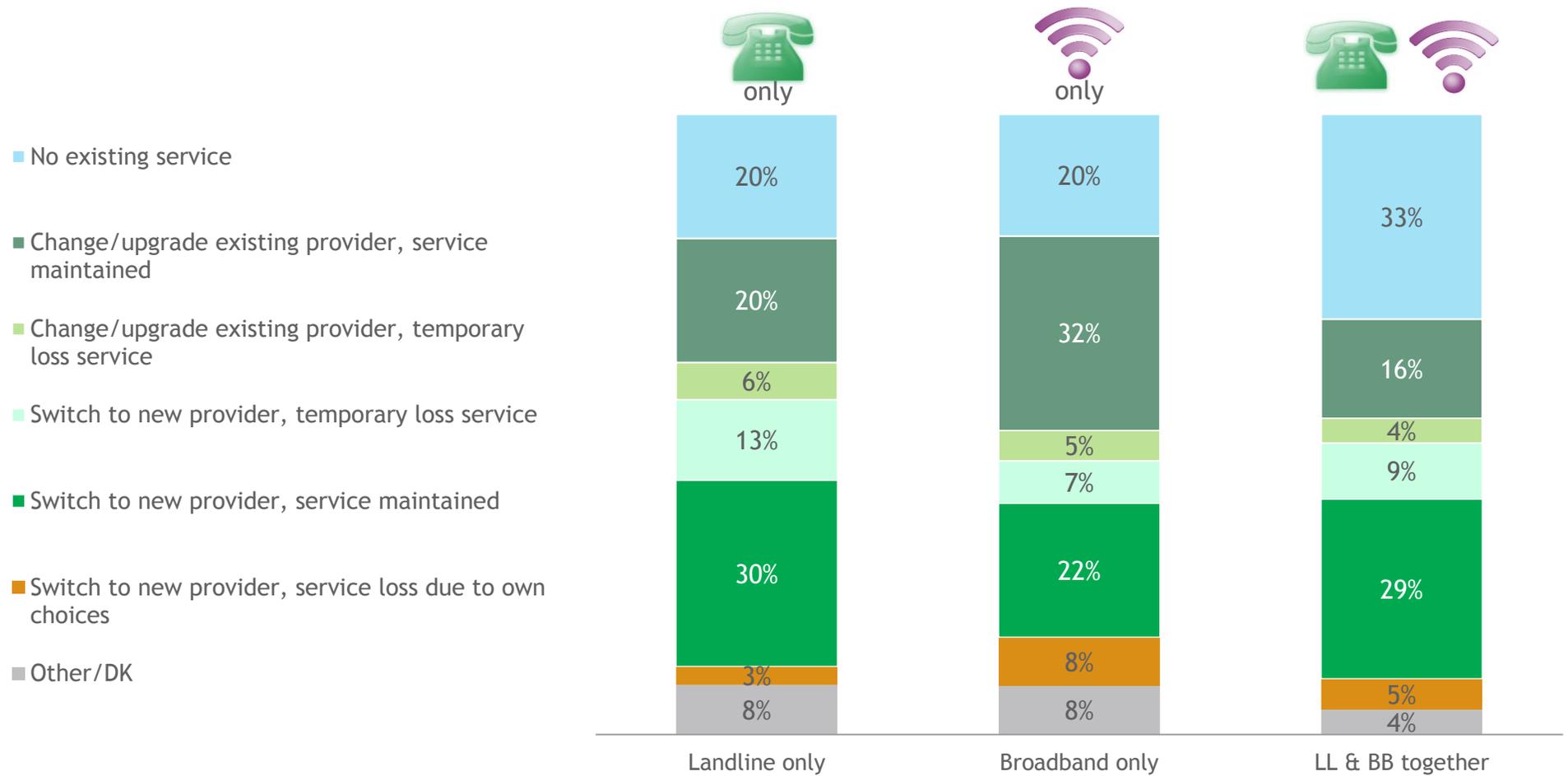
Switching providers/services



C1 When did you last change your supplier or upgrade your service with existing supplier? Base: All Consumers with LL used only for BB n=432, all with LL used for making/receiving calls n=1509, all with fixed broadband internet n=1794. E1a You said earlier that you have changed or upgraded your landline and broadband services in the last two/five years. Did you change both services at the same time to the same provider? E1b (If did not change both services at the same time) Which service did you change or upgrade more recently? Base: All that changed or upgraded their landline and broadband in the last five years n=586.

1 in 3 of those changing their LL and BB together did not previously have existing services in their premises

Scenario last time changed or upgraded service



E2 Which of these scenarios applied to the last time you changed or upgraded your service?

Base: All Consumers that have changed landline only/broadband only/landline & broadband together in the last 5 years n=79*/223/554

*CAUTION LOW BASE

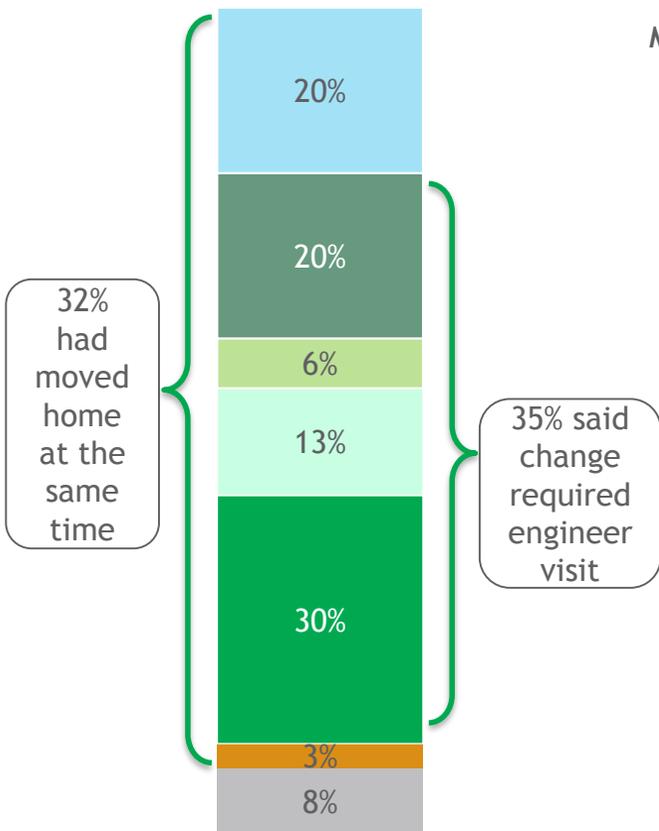
On average 6.4 days to service activation for Landline only. 94% said this was in line with provider information and 92% felt the time taken was reasonable.



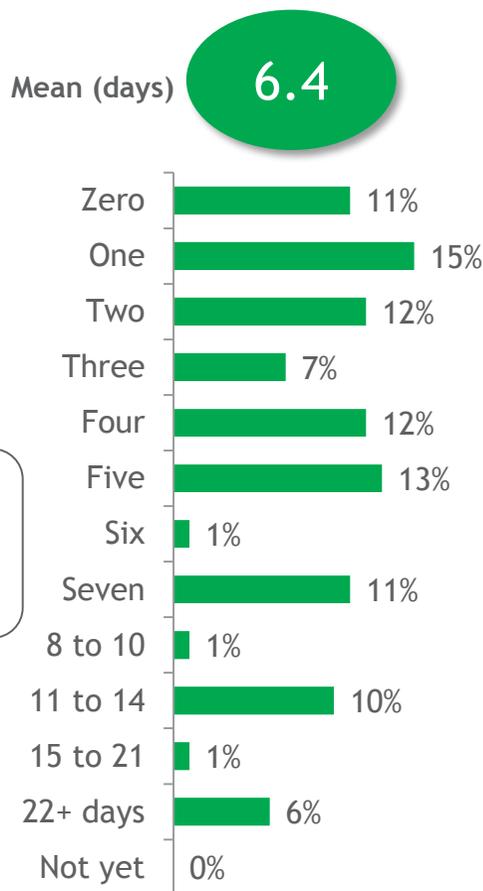
Scenario last time changed or upgraded service

Service activation/upgrade (days)

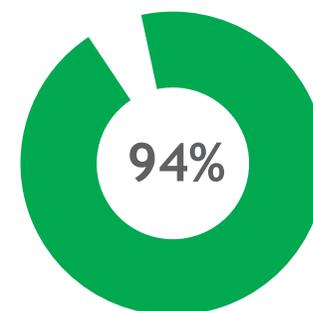
- No existing service
- Change/upgrade existing provider, service maintained
- Change/upgrade existing provider, temporary loss service
- Switch to new provider, temporary loss service
- Switch to new provider, service maintained
- Switch to new provider, service loss due to own choices
- Other/DK



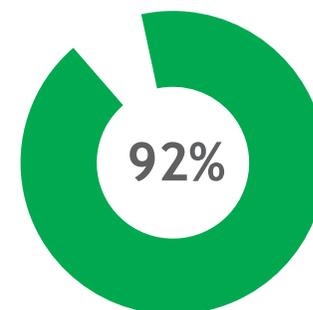
Landline only



In line with time period given by provider?



Reasonable timing?



Of the 6 who said no, 1 said "1 day", 3 said "2 days", 2 said "7 days",

E2 Which of these scenarios applied to the last time you changed or upgraded your service? Base: All Consumer that have changed landline most recently in the last 5 years n=79* E3 Did you move home at the same time? Base: All not 'other/dk' at E2 n=74*. E4 Did the change or upgrade require an engineer to visit your home to install new lines or other equipment? Base: All not 'no existing service' 'service loss due to own choices' or 'other/dk' at E2 n=54*. E5 Approximately how many calendar days after placing the order was the service activated or upgraded? Base: all that had a new landline service n=72* (not including other/dk or those without service due to own choices at E2). E5b And was this in line with the time period you had been given by your provider? E6a Do you think the time it took was reasonable? Base: All where service activated n=72*

*CAUTION LOW BASE

On average 8.5 days to service activation for Broadband only. 93% said this was in line with provider information and 88% felt the time taken was reasonable.



Scenario last time changed or upgraded service

Service activation/upgrade (days)

No existing service

Change/upgrade existing provider, service maintained

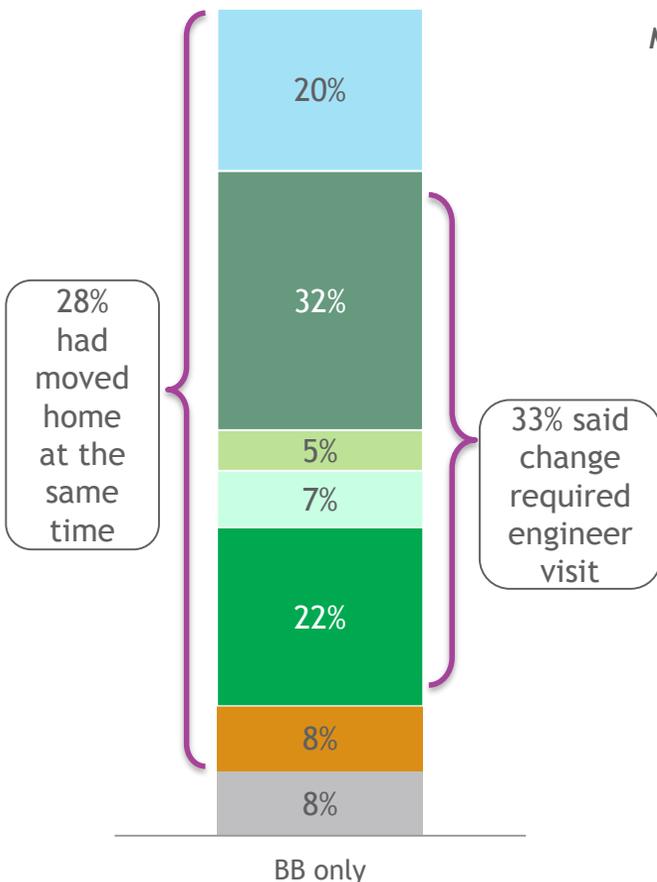
Change/upgrade existing provider, temporary loss service

Switch to new provider, temporary loss service

Switch to new provider, service maintained

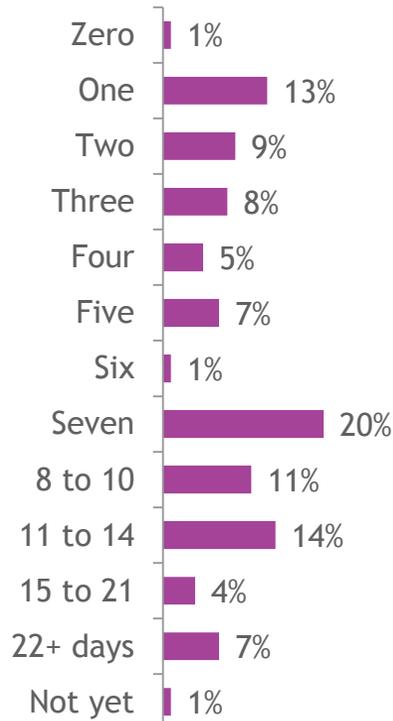
Switch to new provider, service loss due to own choices

Other/DK

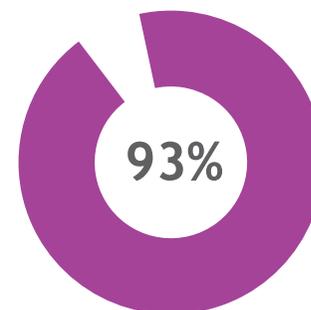


Mean (days)

8.5



In line with time period given by provider?



Reasonable timing?



Of the 23 who said no, the average (mean) was 5 days to be reasonable

E2 Which of these scenarios applied to the last time you changed or upgraded your service? Base: All Consumer that have changed broadband most recently in the last 5 years n=223 E3 Did you move home at the same time? Base: All not 'other/dk' at E2 n=204. E4 Did the change or upgrade require an engineer to visit your home to install new lines or other equipment? Base: All not 'no existing service', 'service loss due to own choices' or 'other/dk' at E2 n=145. E5 Approximately how many calendar days after placing the order was the service activated or upgraded? Base: all that had a new broadband service n=185 (not including other/dk or those without service due to own choices at E2). E5b And was this in line with the time period you had been given by your provider? E6a Do you think the time it took was reasonable? Base: All where service activated n=184

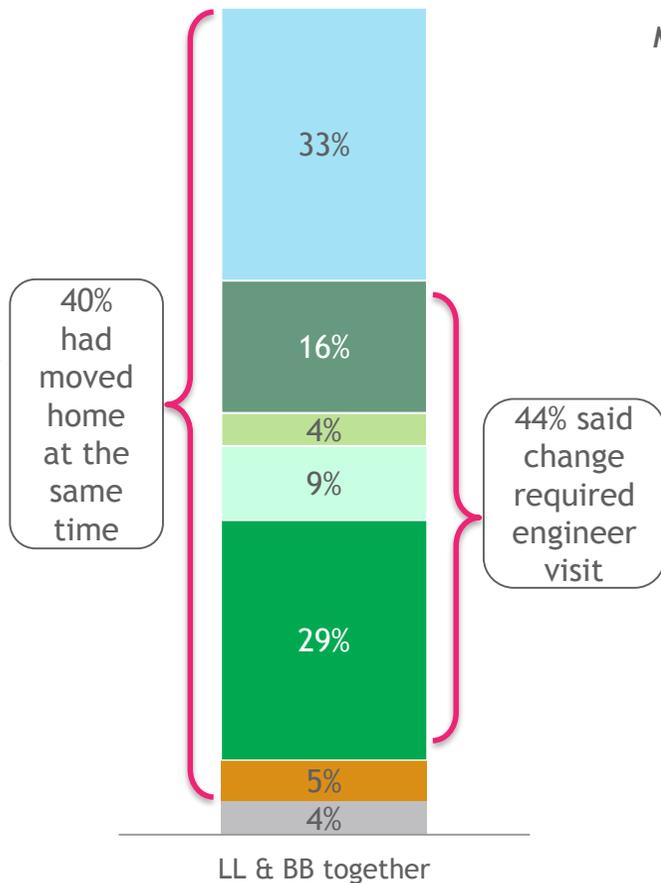
On average 10.8 days to service activation for combined Landline & Broadband. 92% said this was in line with provider information and 86% felt the time taken was reasonable.

Scenario last time changed or upgraded service



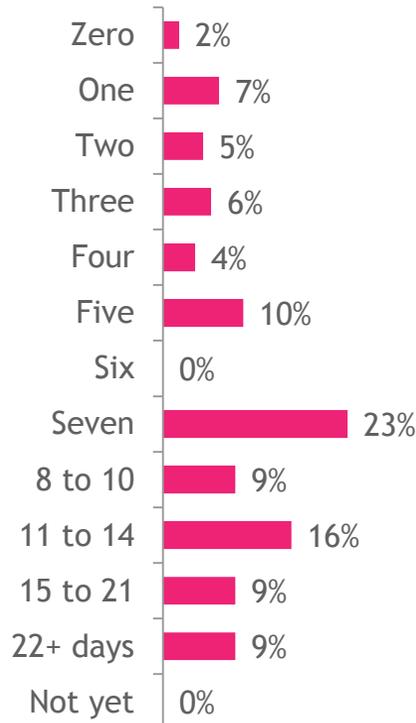
Service activation/upgrade (days)

- No existing service
- Change/upgrade existing provider, service maintained
- Change/upgrade existing provider, temporary loss service
- Switch to new provider, temporary loss service
- Switch to new provider, service maintained
- Switch to new provider, service loss due to own choices
- Other/DK

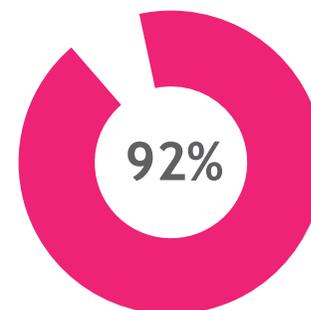


Mean (days)

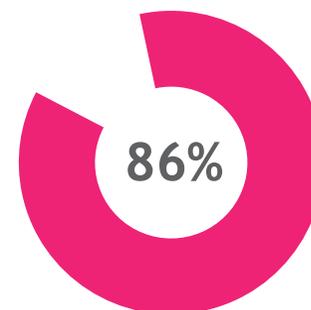
10.8



In line with time period given by provider?



Reasonable timing?

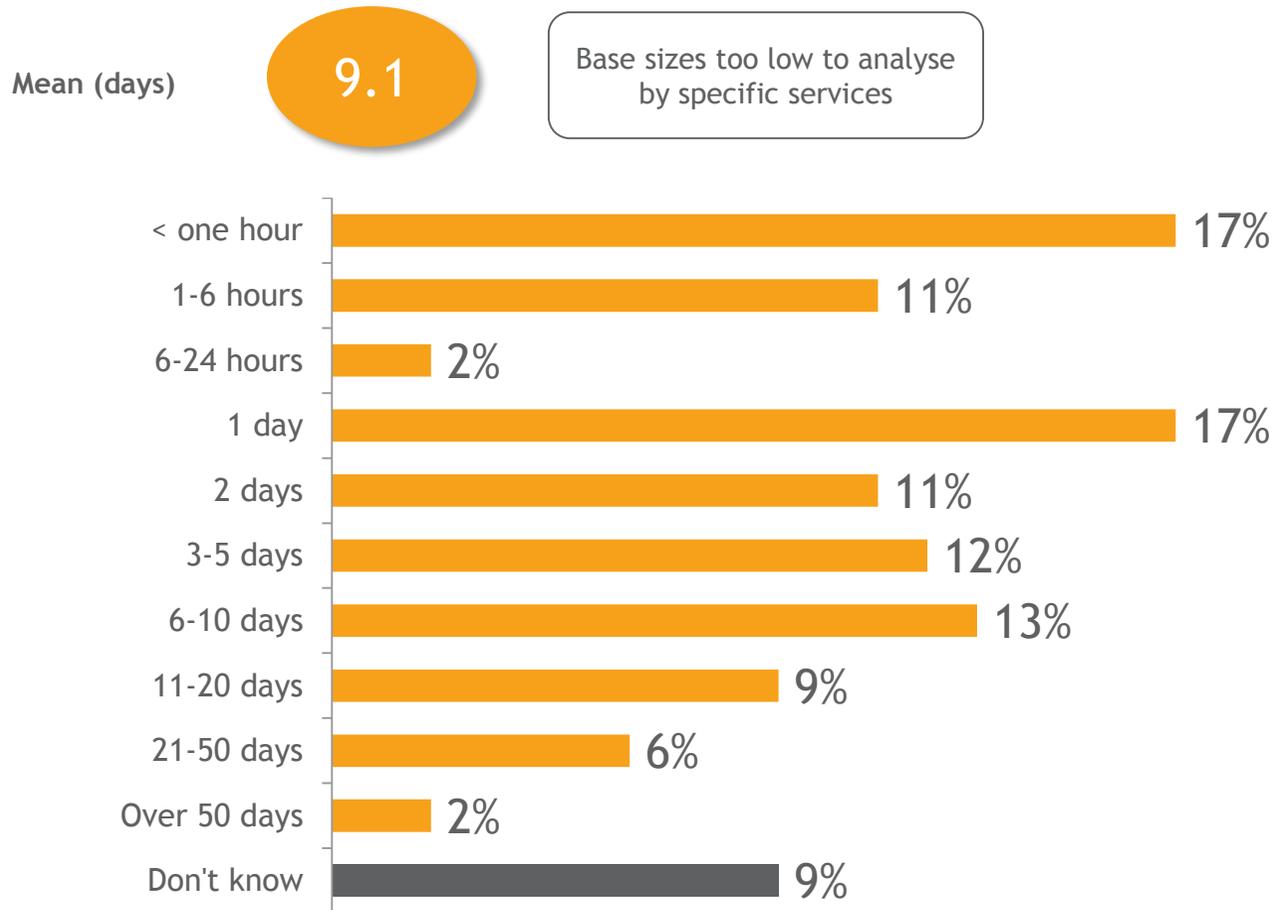


Of the 6 who said no, 1 said "1 day", 3 said "2 days", 2 said "7 days",

E2 Which of these scenarios applied to the last time you changed or upgraded your service? Base: All Consumer that have changed landline & broadband together in the last 5 years n=554. E3 Did you move home at the same time? Base: All not 'other/dk' at E2 n=530. E4 Did the change or upgrade require an engineer to visit your home to install new lines or other equipment? Base: All not 'no existing service', 'service loss due to own choices' or 'other/dk' at E2 n=323. E5 Approximately how many calendar days after placing the order was the service activated or upgraded? Base: all that had a new landline & broadband service n=501 (not including other/dk or those without service due to own choices at E2). E5b And was this in line with the time period you had been given by your provider? E6a Do you think the time it took was reasonable? Base: All where service activated n=500

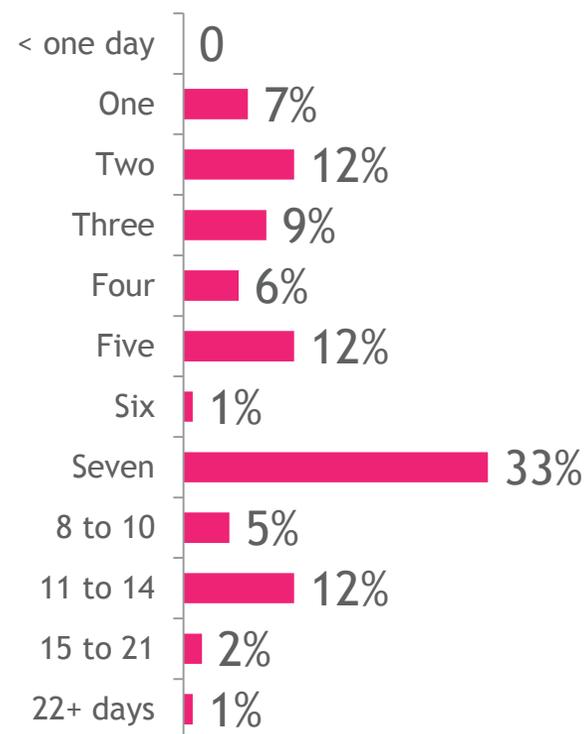
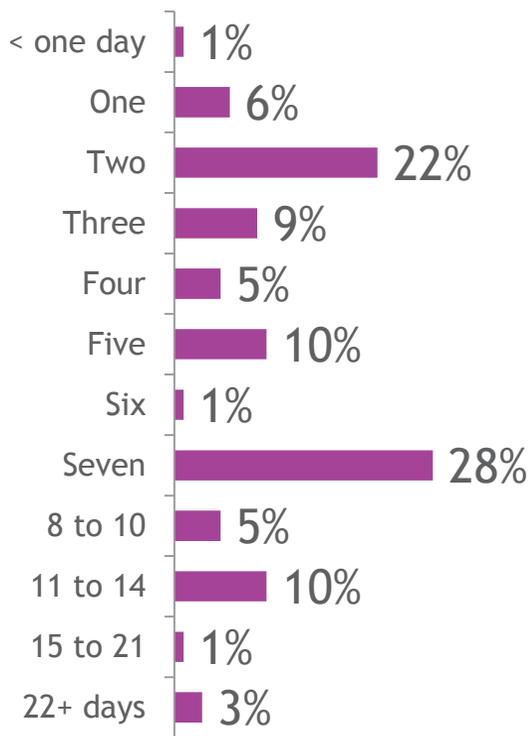
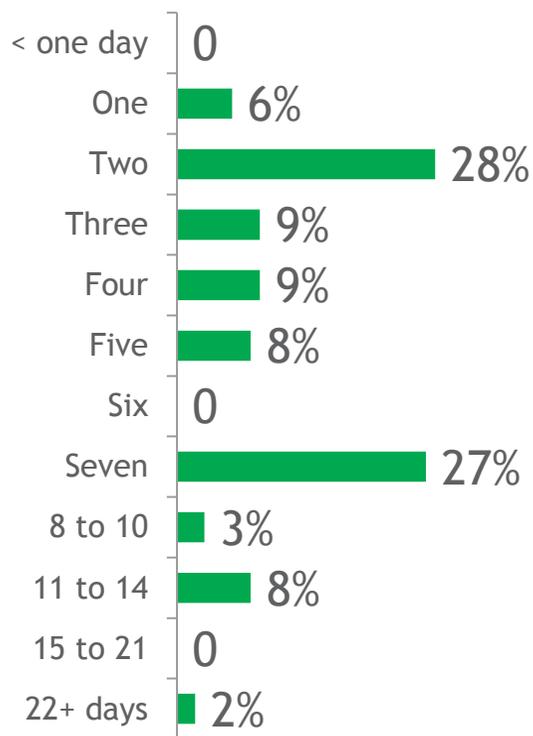
5% of our sample had experienced loss of service during provisioning or upgrading for any of LL, BB or LL&BB). On average this loss was 9 days.

Experience of loss of service (any service) during provisioning or upgrading - how long without the service?



Amongst past switchers, a reasonable activation time to acquire the service from scratch would be around a week for Internet or Landline/Internet combined (slightly lower for landline only)

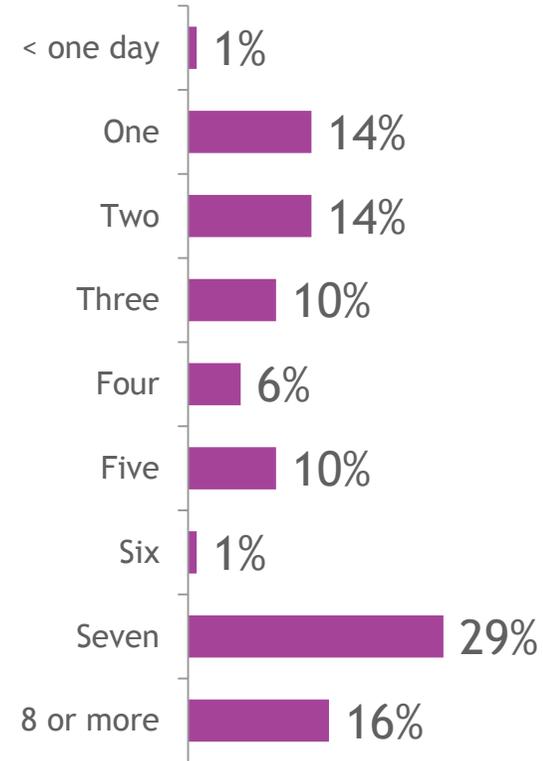
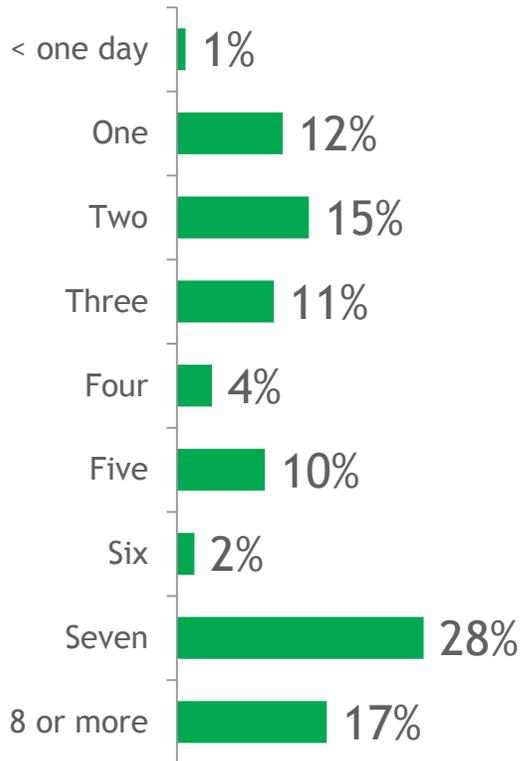
(Amongst switchers in past 5 years): If didn't have service at all, what would be reasonable activation time?



E7 I'd like you to imagine that you did not have (service) at all and had placed an order to have the service installed. How many days would you consider it reasonable to wait for it to be activated? Base: all consumers who had switched landline/broadband/both most recently in past 5 years and had existing landline service n=61*, broadband n=183, landline & broadband n=376. *CAUTION LOW BASE

Amongst all with the service, on average a week (6.6 days) would be acceptable for landline activation; slightly lower for broadband (5.8 days)

If didn't have service at all, what would be reasonable activation time?



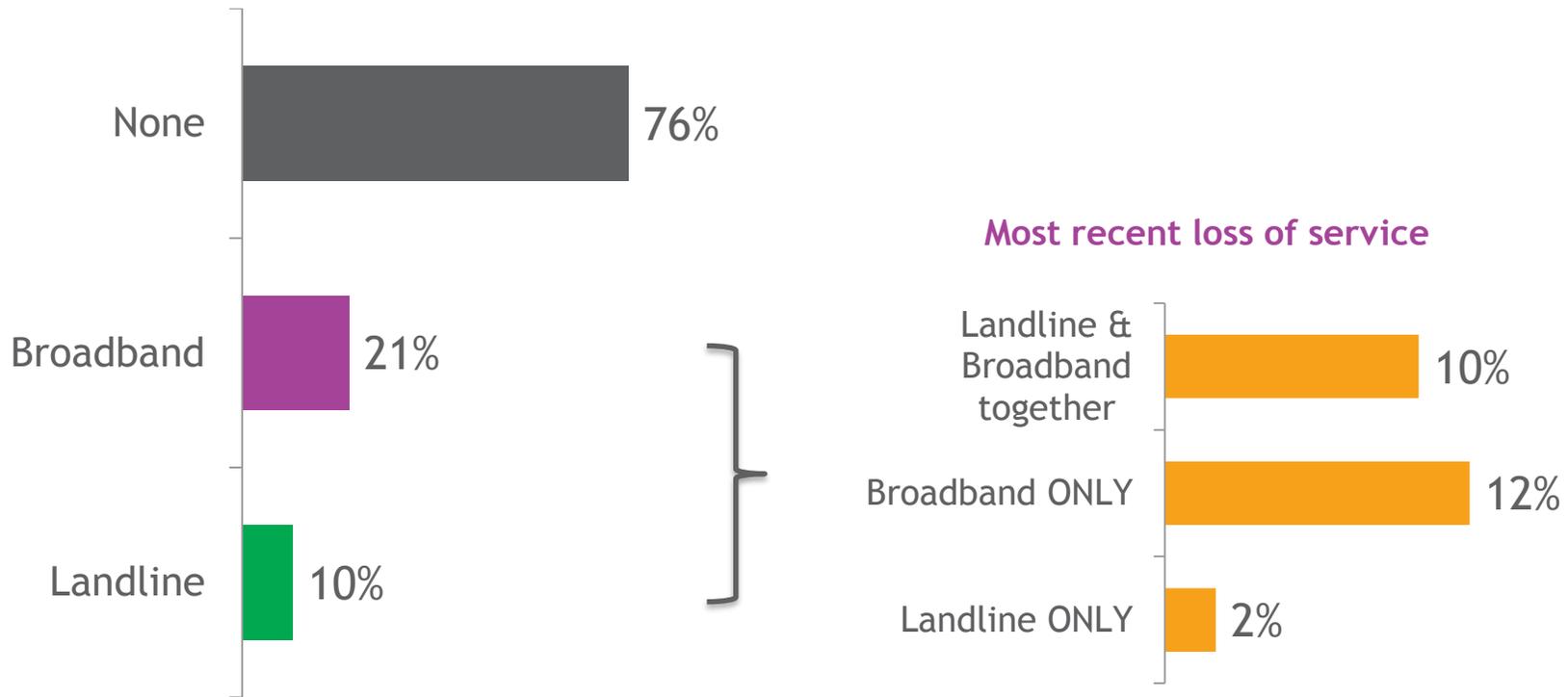
G16 I'd like you to imagine that you did not have (service) at all and had placed an order to have the service installed. How many days would you consider it reasonable to wait for it to be activated? Base: all consumer with a landline n=1961, all with broadband n=1798

Section 4

Experience of and impact of loss of service

Within the last 2 years, a quarter (24%) have ever experienced complete loss of service for more than one hour

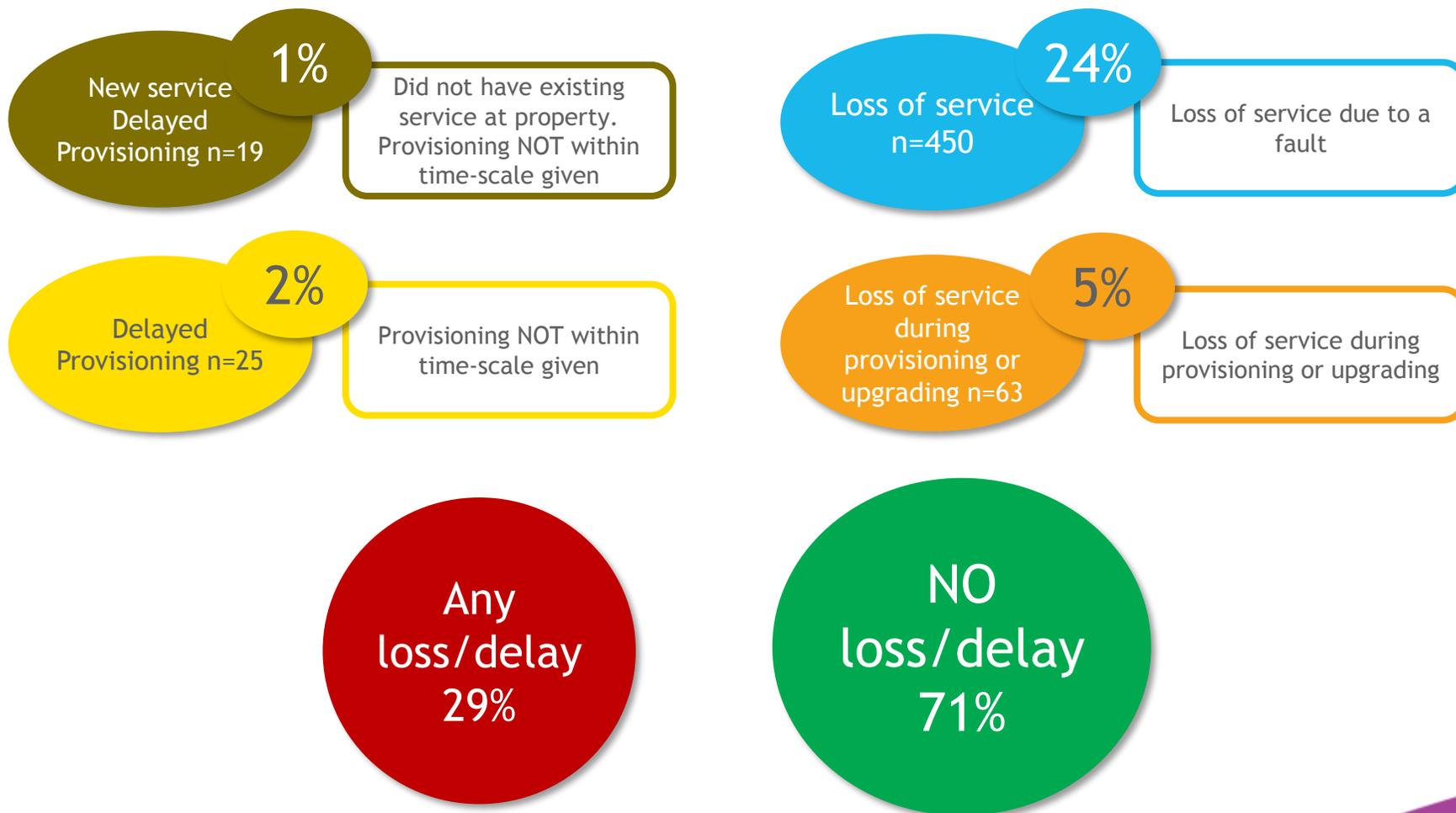
Experience loss of service in last 2 years



E9a Over the last 2 years, have you experienced a complete loss of service for more than one hour for the following services taken by your household? By loss of service, we mean complete inability to make or receive voice calls or to access the internet. Please don't include instances when your connection speed was slower than usual, but do include those that occurred as a result of a fault on your existing service. E9b Did you lose your landline and your broadband service at the same time? E9c Which service did you lose most recently? E9d When you lost your landline service did you also lose your broadband at the same time? E9e When you lost your broadband service did you also lose your landline at the same time? Base: Total Sample Consumers n=2088

Overall, 29% had experienced any loss or delay with regard to their fixed line telecommunications services. The vast majority of these were related to loss of existing services due to a fault, rather than issues with provisioning/upgrading

% incidence in each group within the CONSUMER population



On average, a complete LoS lasts 3.5 days. A LoS involving broadband (only) lasts a day less (2.7 days) and a reported LoS a day more (4.4 days), whereas a loss of service during provisioning or upgrading lasts approximately 2 days

How long experienced loss of service for?

Mean (days)

Any Loss of service

Loss of service

Loss of service during provisioning or upgrading

Mean (days)

Any LoS during provisioning or upgrading

Median 1.0 **3.5**

broadband only

Median 0.3 **2.7**

Any landline

Median 2.0 **4.5**

Reported LoS

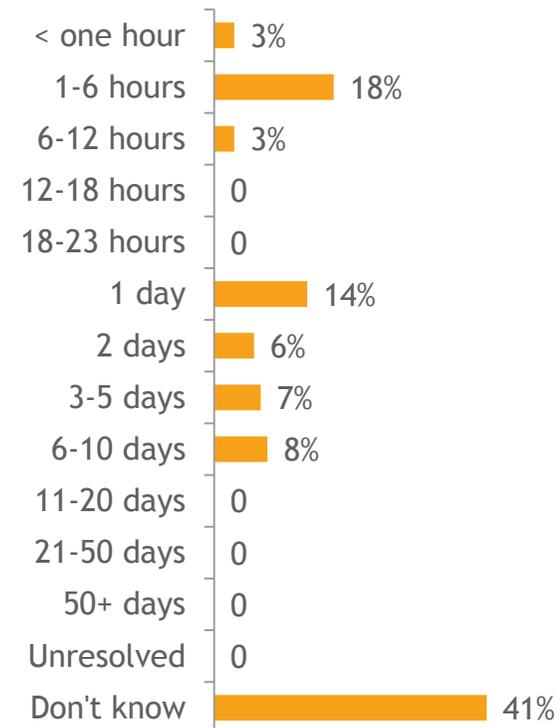
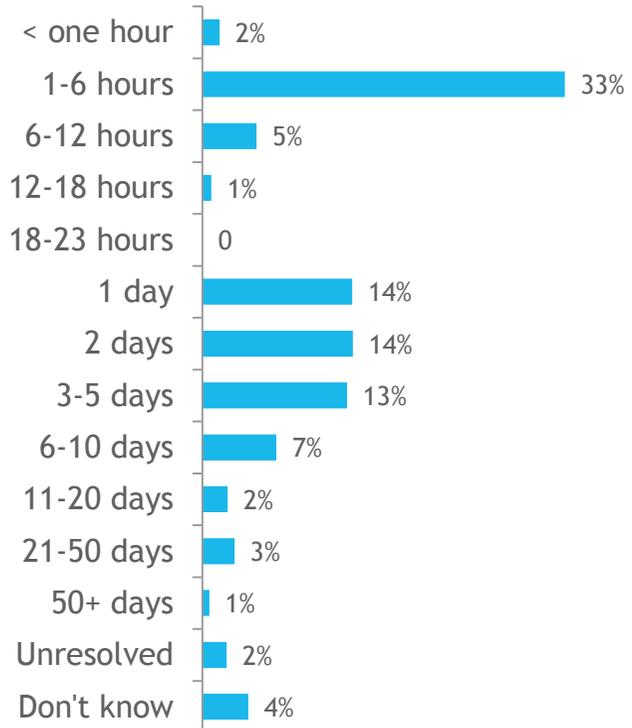
Median 2.0 **4.4**

Non-reported LoS

Median 0.1 **0.6**

1.9

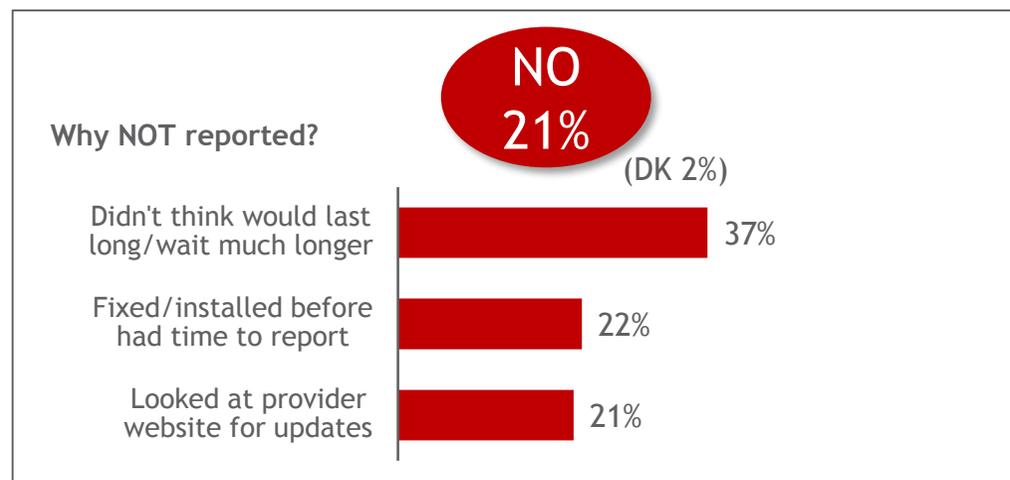
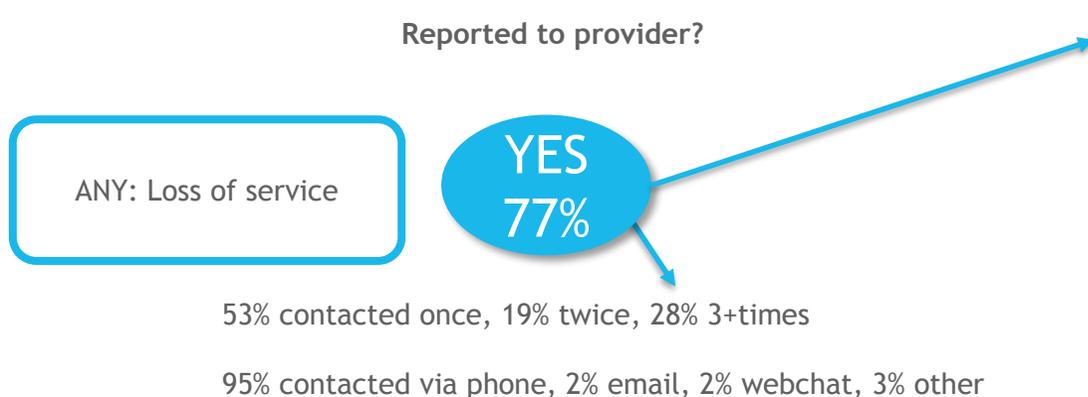
Median 1.0



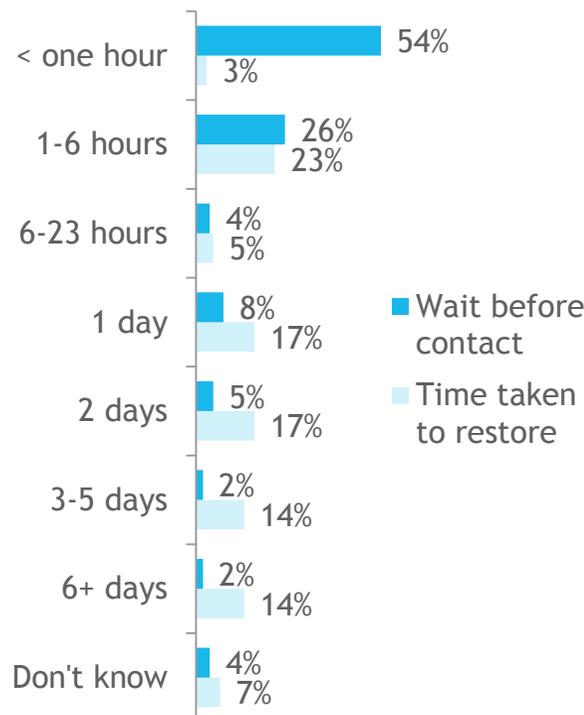
F1 Thinking about the most recent loss of your landline due to a fault / delay in service change or upgrade on your landline/broadband/ how long did you experience a loss of service for? Base: All that experienced a loss of service n=450, broadband n=228, landline n=222
 Base: All that experienced loss of service during provisioning or upgrading n=63* *CAUTION LOW BASE

On average, three-quarters reported their fault to their provider. Of these, more than half made contact within the hour - almost exclusively via the telephone and half just once

Experience of loss of service (any service)



How long wait after loss did you contact your provider?
How long did it take for service to be restored after first notification?



Mean: 0.5 days

Mean: 4.3 days

F2a Did you report your Landline/Broadband/Landline & Broadband loss of service / delay in your new order to your provider? Base: Loss of service n=450
F2b why did you not contact your provider Base: all not reporting n=96*. F2c How long after you (lost service/expected service to be installed/upgraded) did you contact the provider to let them know? F2d How did you contact your provider? F2e How many times did you contact your provider? F5 How long did it take for your service to be restored after you first notified your provider of the issue? BASE: all who reported n=348. *CAUTION LOW BASE

Those losing any landline service were more likely to report it to their provider

Experience of loss of service - Any loss vs. broadband only vs. Any landline

Reported to provider?

Any loss of service

broadband only

Any landline

Any loss of service

broadband only

Any landline



YES



NO



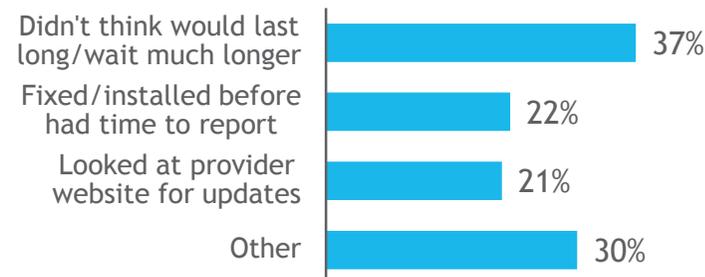
How reported?

53% contacted once
19% twice
28% 3+times

95% via phone
2% email
2% webchat
3% other

No significant differences
by BB only vs. Any LL

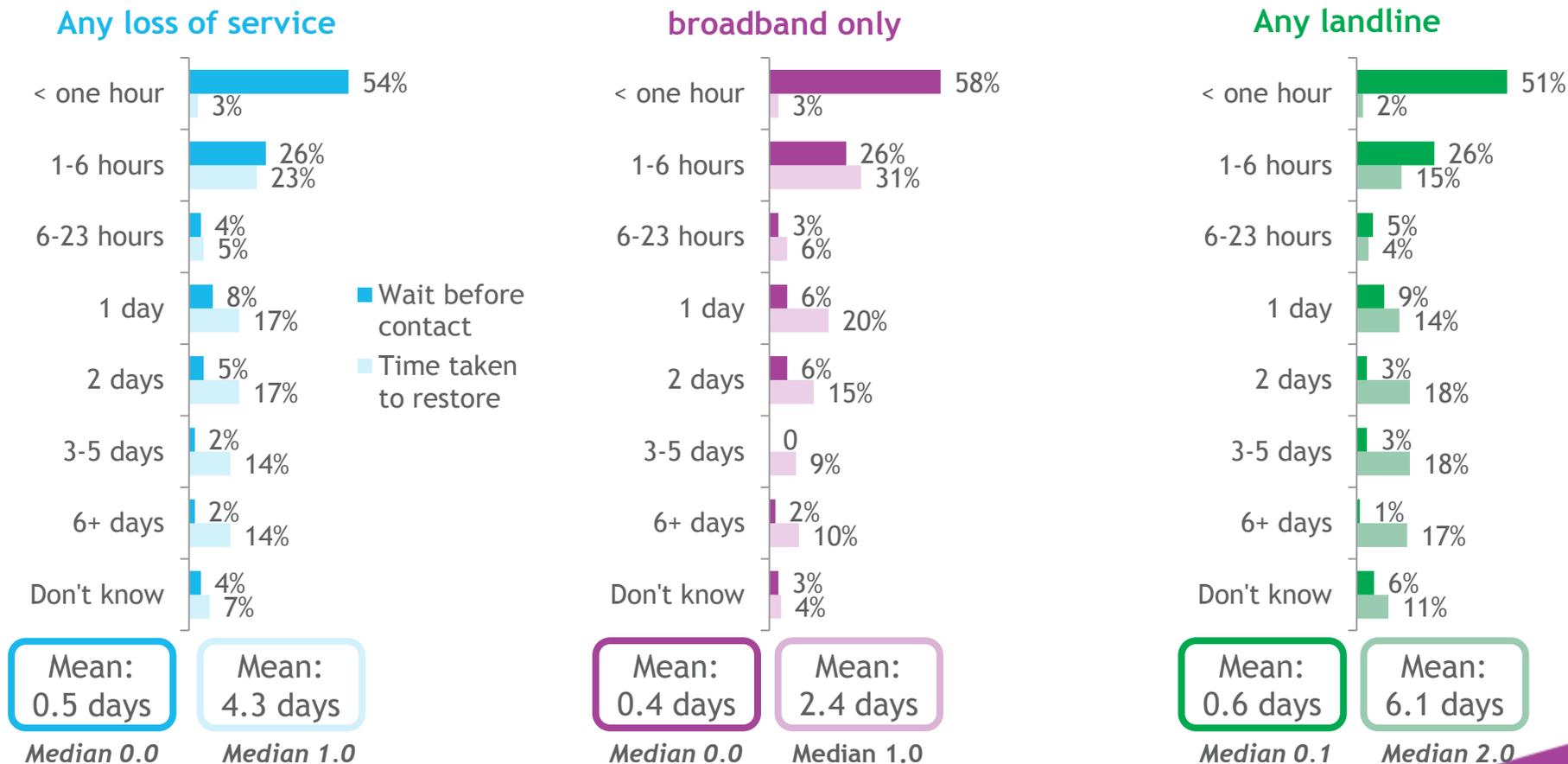
Why NOT reported?



On average, it takes 4.3 days to restore a service. Broadband (only) losses are restored more quickly

Experience of loss of service (any service) - amongst those reporting a LoS

How long wait after loss/expectation before contacting provider?
 How long did it take for service to be restored after first notification?



F2c How long after you (lost service/expected service to be installed/upgraded) did you contact the provider to let them know?
 F5 How long did it take for your service to be restored after you first notified your provider of the issue?
 BASE: all who reported n=348, broadband only n=164, any landline n=184

Only a quarter reported a loss of service during provisioning or upgrading to their provider.

Experience of loss of service (any service) during provisioning or upgrading

Reported to provider?

ANY: Loss of service during provisioning or upgrading

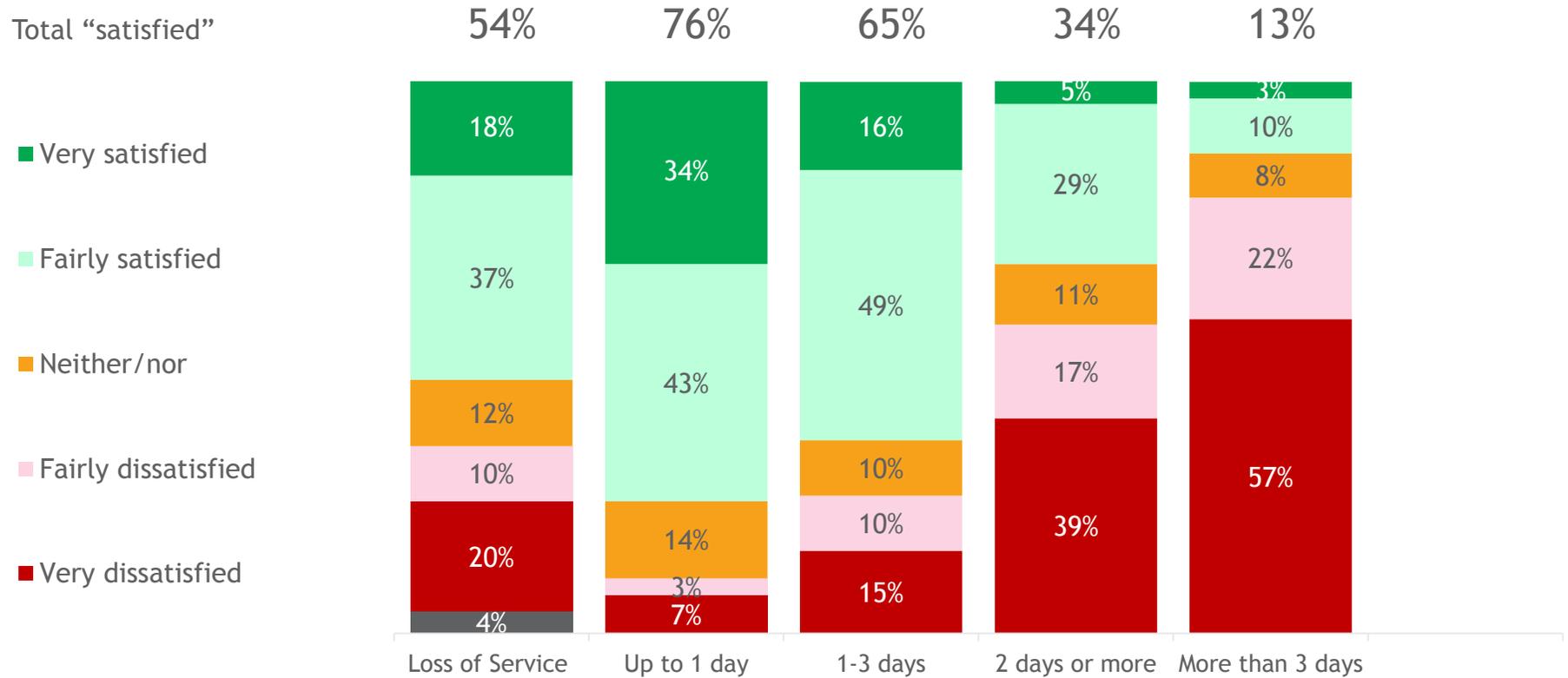
YES
25%

NO
58%

(DK 17%)

Consumers become increasingly dissatisfied with their provider’s ability to resolve the issue as the length of time to resolve increases

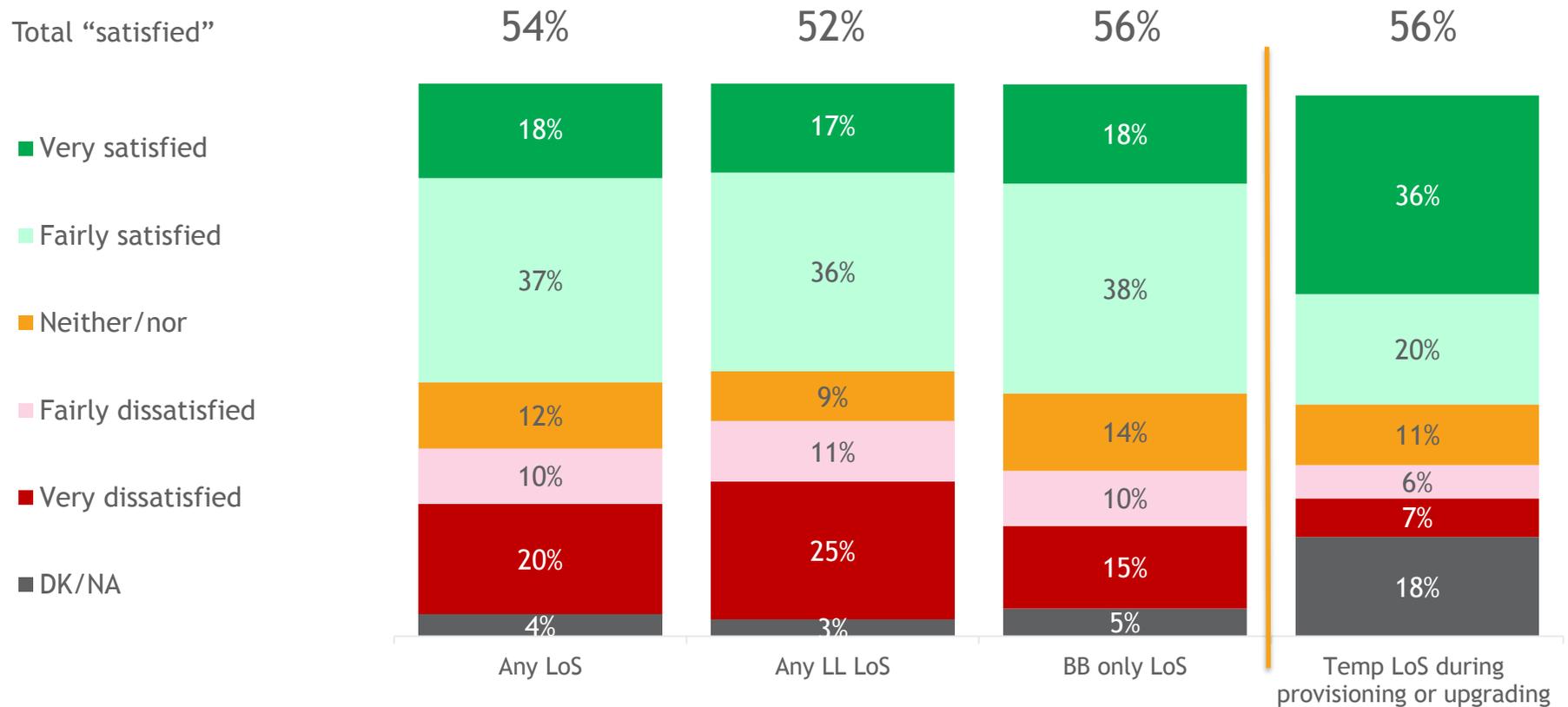
Satisfaction with provider ability to resolve loss of service x by how long did it take for your service to be restored after first notifying the provider



F6 Overall, how satisfied or dissatisfied were you with the length of time it took your provider to resolve your loss of service for your (service), using the following scale?
 Base: All with a complete loss of service n=450, F5 How long did it take for your service to be restored after you first notified your provider of the issue? BASE: all who reported n=348, all where service restored within 1 day n=105, 1-3 days n=136, 2 days or more n=162, more than 3 days n=83* *CAUTION LOW BASE

Just over half were satisfied with their provider's ability to resolve their loss of service

Satisfaction with provider ability to resolve loss of service



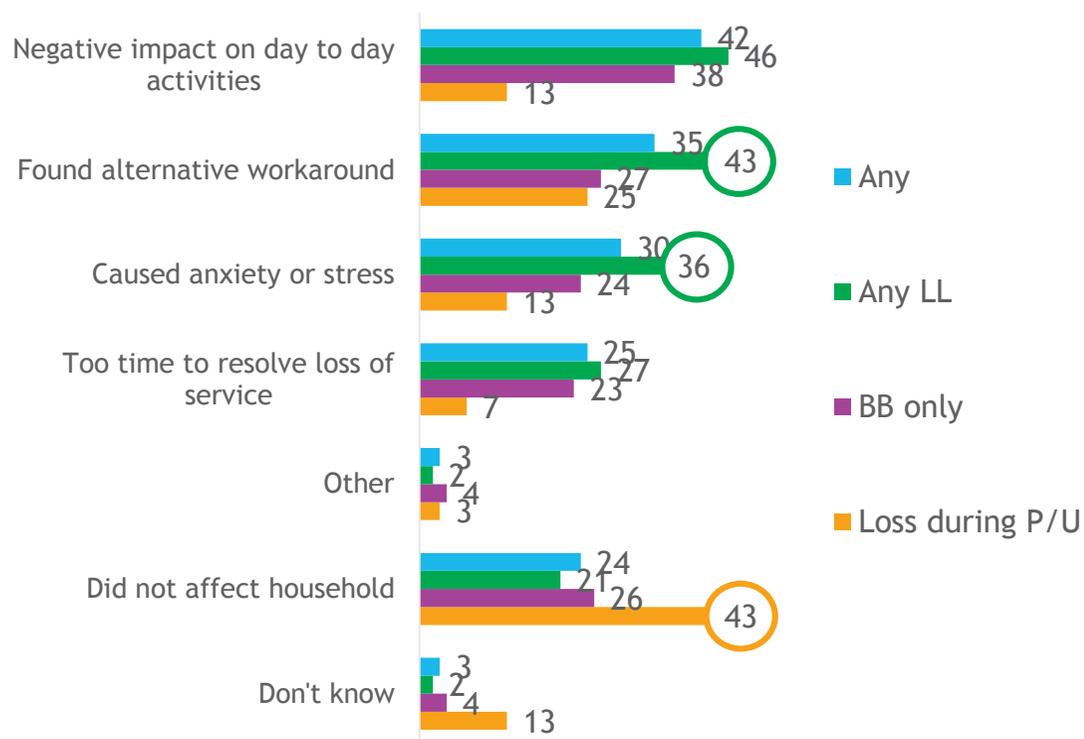
No difference in satisfaction by reported vs not reported

F6 Overall, how satisfied or dissatisfied were you with the length of time it took your provider to resolve your loss of service for your (service), using the following scale?
 Base: All with a complete loss of service n=450, landline or landline & broadband loss of service n=222, broadband only loss of service n=228. Loss of service during provisioning or upgrading n=63*

Two fifths of those experiencing a loss of service claim it had a negative impact on their day to day activities. A reported loss or a loss involving a landline are more likely to lead to negative impacts, anxiety and stress.

Two fifths of those experiencing a loss of service during provisioning or upgrading claim it had no adverse affects on their household.

Household impacts (Loss of Service)



Reported losses tend have a more **negative impact on day to day activities** (47% vs 27%) and **cause more anxiety and stress** (33% vs 19%)

Non-reported losses are less likely to affect the household (35% vs 20%)

F7a Which, if any, of the following would you say applied to your most recent loss of service. Base: All that experienced a loss of service, n=450 (reported n=348, not reported n=96*), loss of landline or landline & broadband n=222, broadband only n=228, Base: loss of service during provisioning or upgrading n=63*

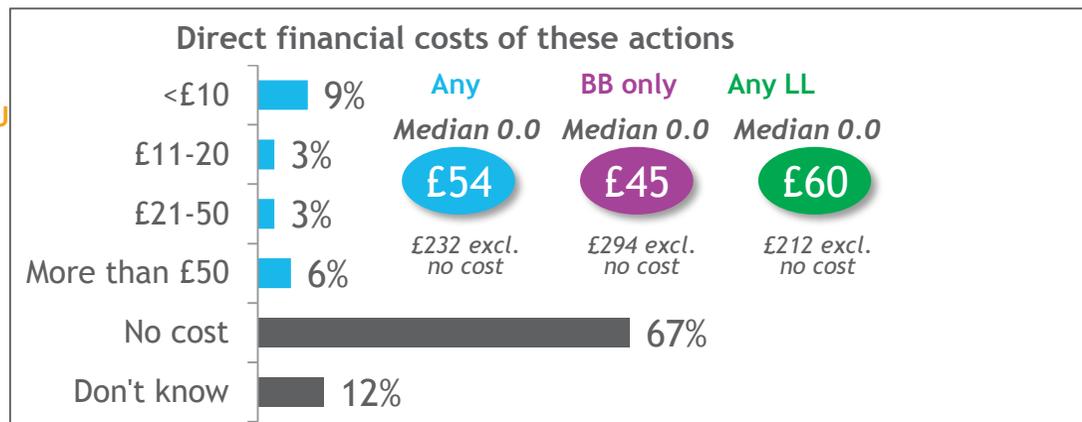
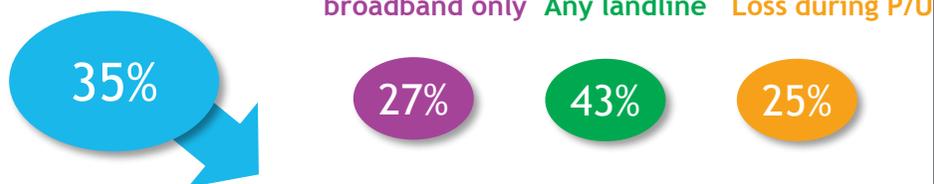
*CAUTION LOW BASE

Amongst those who found an alternative workaround, mobiles were heavily used as a substitute; largely with no direct financial cost associated

Experience of a loss of service

Found an alternative workaround

Any loss of service



Actions taken to reduce impact

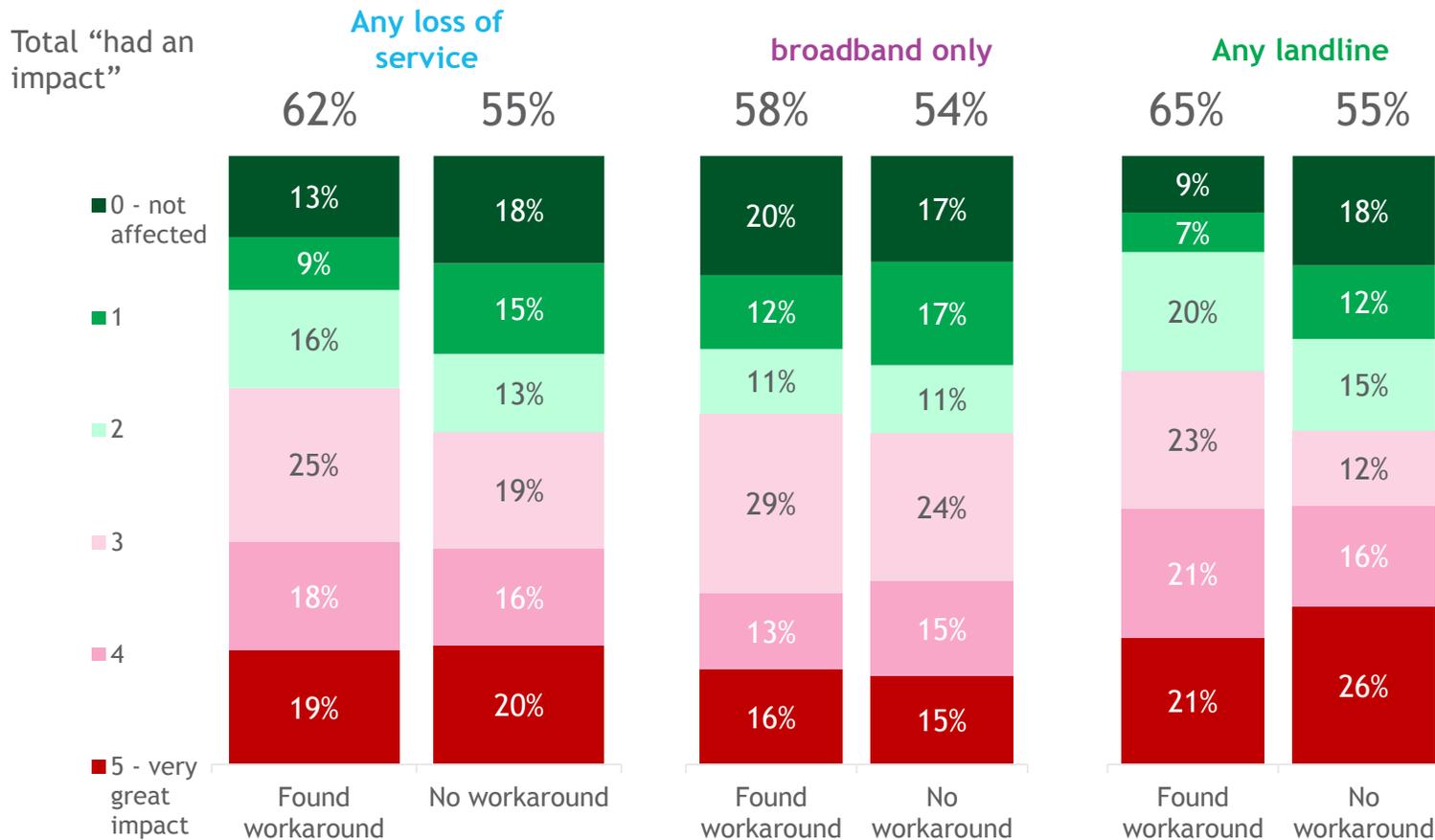


broadband only 59%	Any landline 83%
broadband only 40%	Any landline 67%
broadband only 59%	Any landline 49%
broadband only 58%	Any landline 43%
broadband only 25%	Any landline 13%

F7a Which, if any, of the following would you say applied to your most recent loss of {relevant service} OR delay to activation or upgrade of your {relevant service}? Base: All that experienced a loss of service Total n=450. F7b> What, if anything, did you do to reduce the impact of this [telephone landline / fixed broadband] loss of service / delay to activation or upgrade of your service? Base: all who found an alternative workaround n=160, any landline n=96*, broadband only n=64*. F7c> Thinking about the factors you mentioned, what were the direct financial costs to you (e.g. cost of mobile calls) and the people in your household that were caused by your most recent loss of service / delay in service installation? Base: all that did something and found an alternative workaround - any service n=152, any landline n=91*, broadband only n=61*. *CAUTION LOW BASE

Two thirds of those that found a workaround claim that it had a negative impact on their normal activities.

Extent to which normal activities affected by workaround/loss of service



Base too small to look at this by loss of service due to provisioning or upgrading

F7d To what extent were your normal activities affected by this workaround? Base: all that found alternative workaround any loss of service n=160, broadband loss only n=64*, any landline loss n=96*. F10 To what extent were your normal activities affected by this loss of service? Please use a scale where 0 indicates 'not affected' (i.e. was able to carry out same activity as would have done in event of no loss of service) and 5 indicates a very large impact (i.e. it was not possible to do any of the things you usually do using the service you lost). Base: all that did NOT find an alternative workaround any loss of service n=290, broadband loss only n=164, any landline loss n=126. *CAUTION LOW BASE

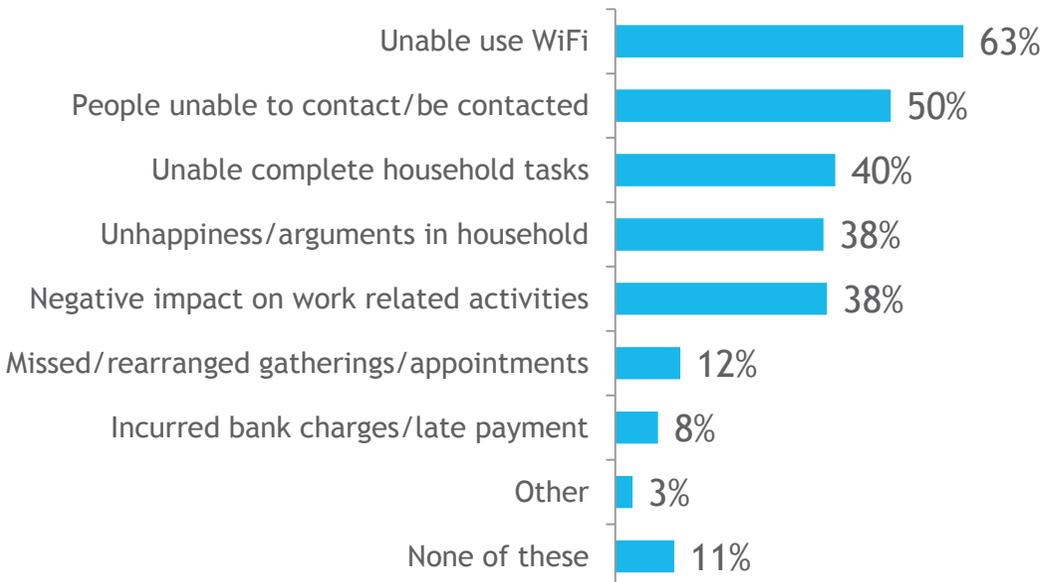
Key negative impacts of loss were an inability to use WiFi or contact/be contacted

Experience of a loss of service

Loss/delay had a negative impact on day to day activities



Any of following applied?



Broadband only LoS



Any landline LoS



Loss during provisioning or upgrading



broadband only 66%

Any landline 60%

broadband only 37%

Any landline 61%

broadband only 42%

Any landline 38%

broadband only 33%

Any landline 42%

broadband only 41%

Any landline 36%

The majority (89%) of those who took time to try and resolve their loss of service, called their provider. About half spent time trying to fix it themselves

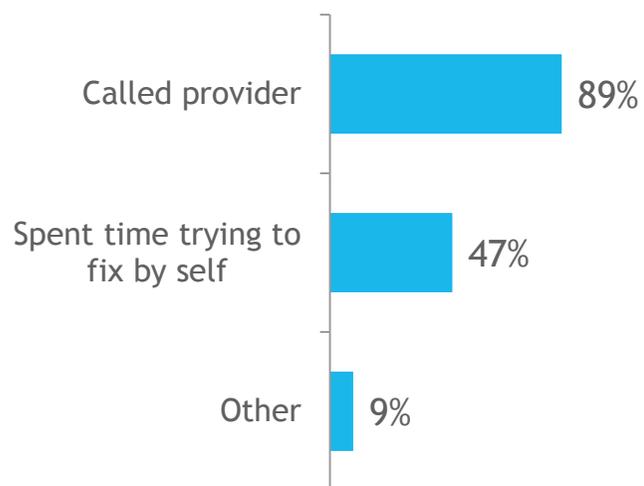
Experience of a loss of service

Took time to try to resolve loss of service

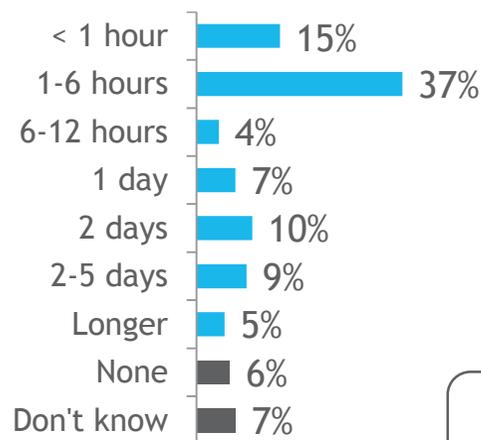


Base too small to look at this by other subgroups

Actions taken to try to resolve



Time taken trying to get services fixed



Mean:
2.5 days

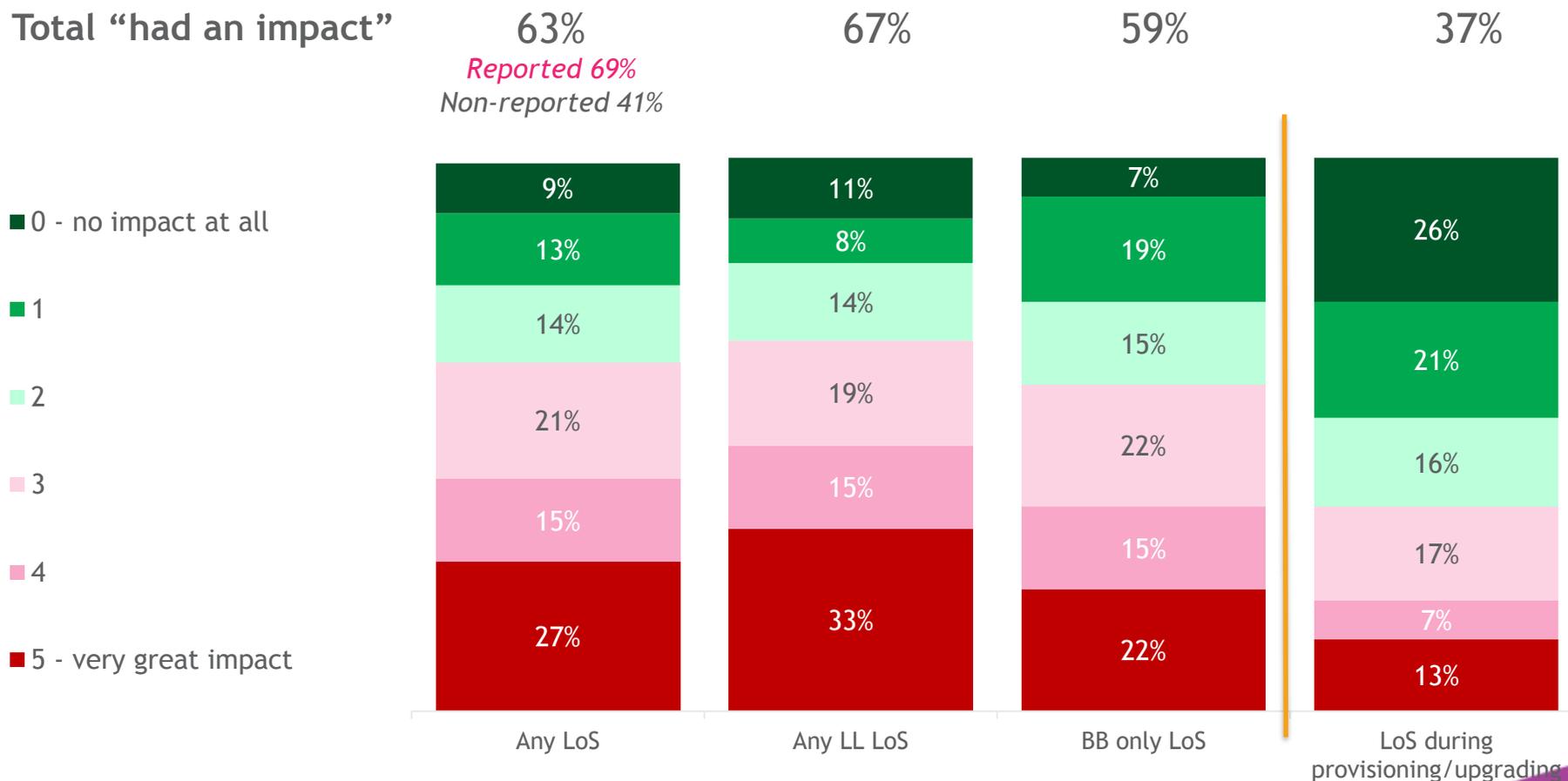
Median 0.1

Mean amongst those saying less than one day 0.2 (median 0.1) days

F8a What did you do to try to resolve your loss of service? F8b How much time did you and other people in your household spend trying to get your service(s) fixed? Please think about all the things that you and others in your household spent time on to resolve the loss (e.g. time spent on the phone with your provider or time spent trying to fix the problem yourselves). It should not include the time spent waiting for an engineer visit(s).
Base: all loss of service that took time to resolve n=107

Two thirds state that the loss of service had an impact on the communication needs of their household. This impact increases when the LoS is reported.

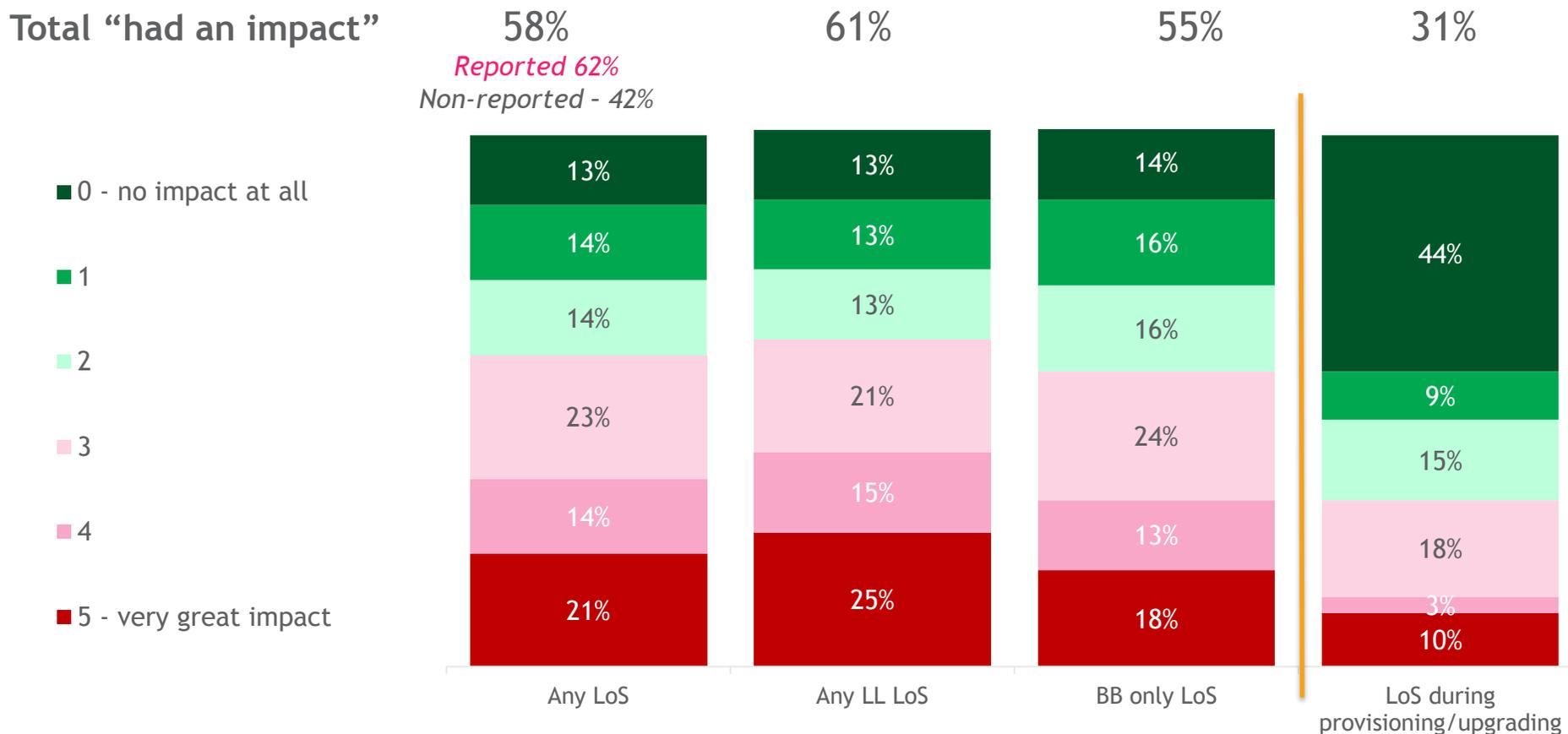
Impact of loss of service on communication needs of household



F3 Thinking back to when you experienced your most recent loss of service. How much of an impact did this have on the communication needs of your household?
 Base: All consumer that experienced a loss of service n=450 (reported n=348, not reported n=96*), any landline loss (landline or landline and broadband) n=222, broadband only loss of service n=228, loss of service due to provisioning or upgrading n=63* *CAUTION LOW BASE

Three fifths state that the loss of their service had an impact on the household generally. Again, this impact increases when the LoS is reported.

Impact of loss of service on household generally



F15 How much of an impact did the loss of your {relevant service} / delay in service activation or upgrade have on your household? Base: All consumer that experienced a loss of service n=450 (reported n=348, not reported n=96*), any landline loss (landline or landline and broadband) n=222, broadband only loss of service n=228, loss of service due to provisioning or upgrading n=63*. *CAUTION LOW BASE

Overall, 1 in 4 had spend time waiting in for engineer visit(s), with 1 in 10 taking time off work in order to do so

Incidence of waiting for engineer visit(s) or taking time off work

Any loss of service



Proportion had to spend time waiting in for engineer visit(s)
(any loss of service)

broadband only



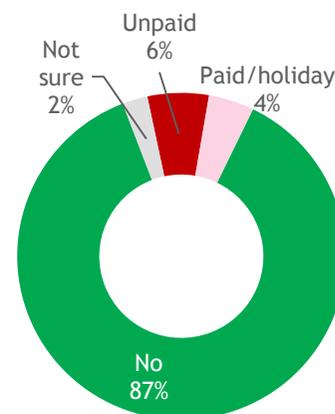
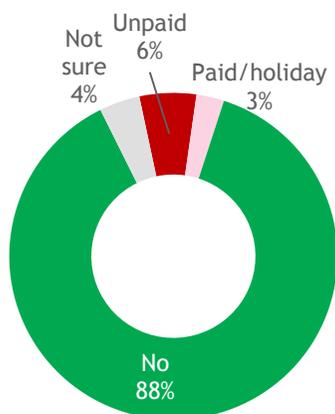
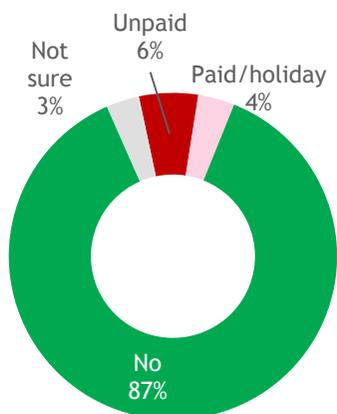
Any landline



LoS during provisioning /upgrading



You/others in household have to take time off work?
(any loss of service)

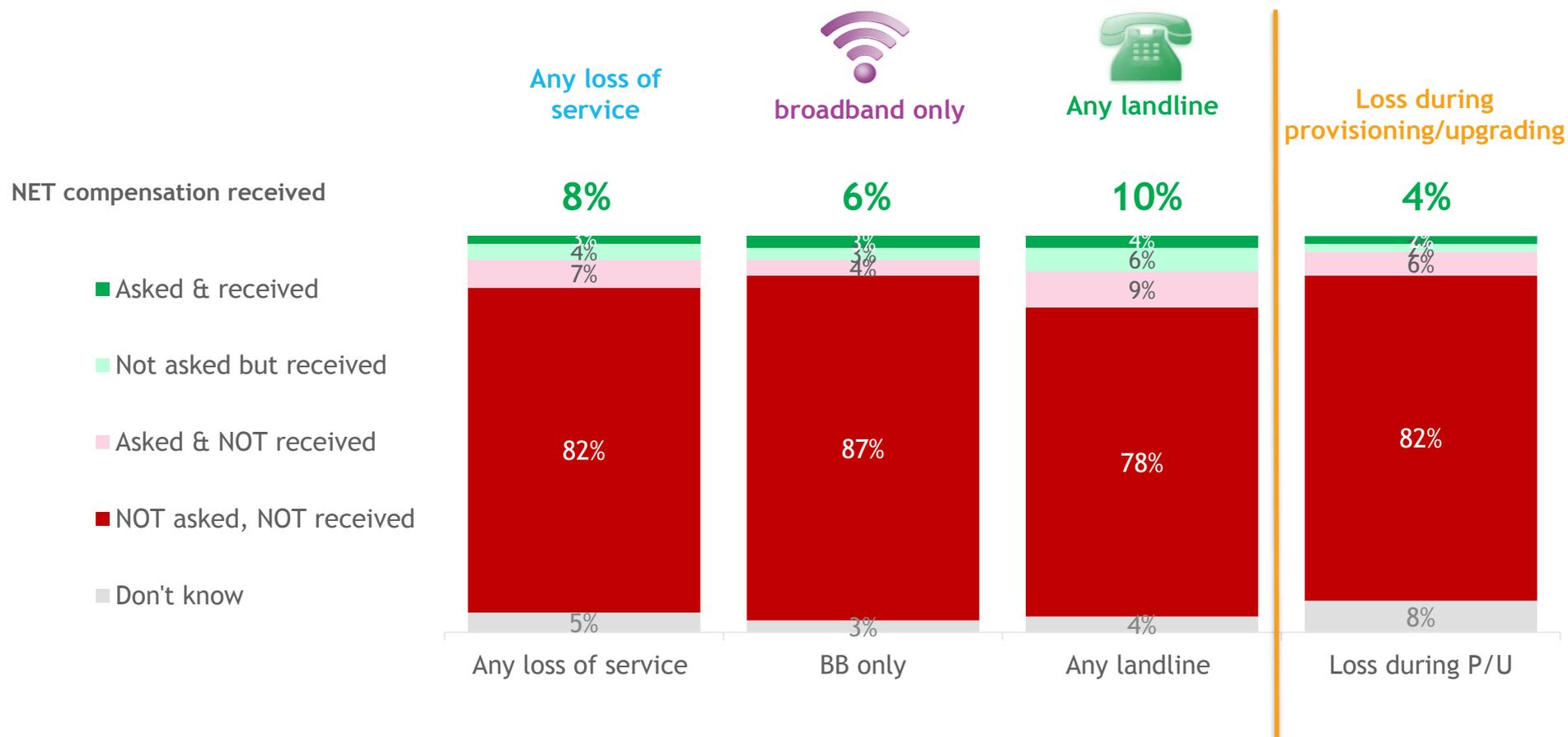


Section 5

Compensation for loss of service

7% had received compensation for a loss of service and 4% for a loss of service due to provisioning or upgrading

Compensation



The vast majority had not asked for compensation - key reasons being a lack of expectation or a belief that it wouldn't be worth the effort

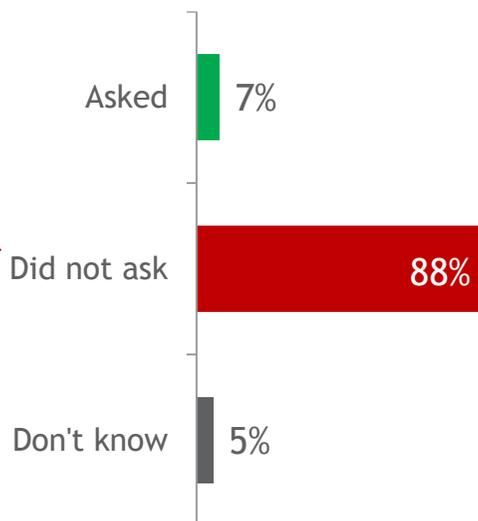
Experience of loss of service or delayed provisioning

Received compensation for loss of service/delayed provisioning?

YES 8%

NO 93%

Asked for compensation?



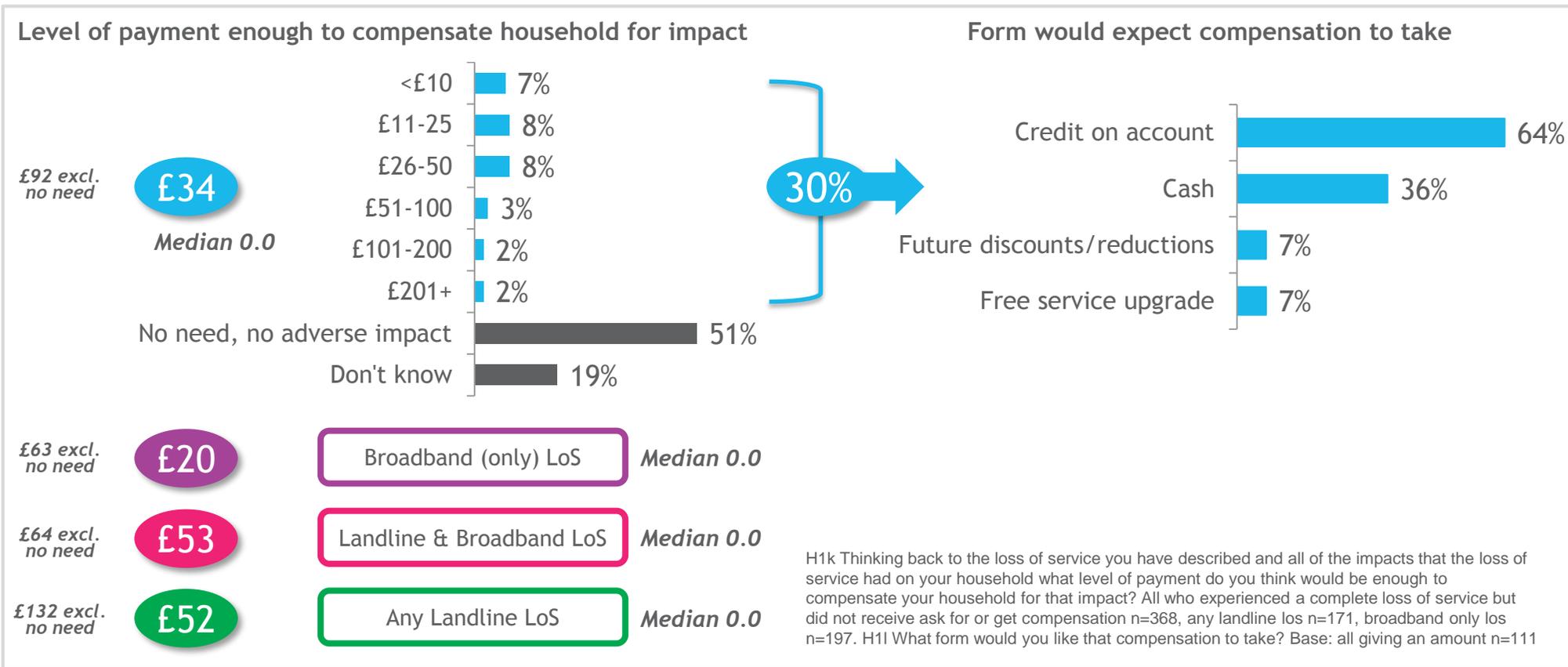
Why not ask?



H1a Did you receive any compensation from your provider for this loss of service/delay in installation/activation? All that experienced a loss of service or delay provisioning (any service) n=557 H1c/d Did you ask for compensation or was it offered/did you ask for compensation in regard to the loss of service? Base: all that did not receive compensation n=514. H1e Why did you not ask for compensation? Base: all who did not get or ask for compensation n=454.

30% of consumers expect to be compensated for the impact that the loss of service had on their household. On average, they would expect approximately £35 (£10 per day) - to be paid as a credit on their account or in cash

Expected compensation (amongst all with complete loss of service yet not received/asked/offered)



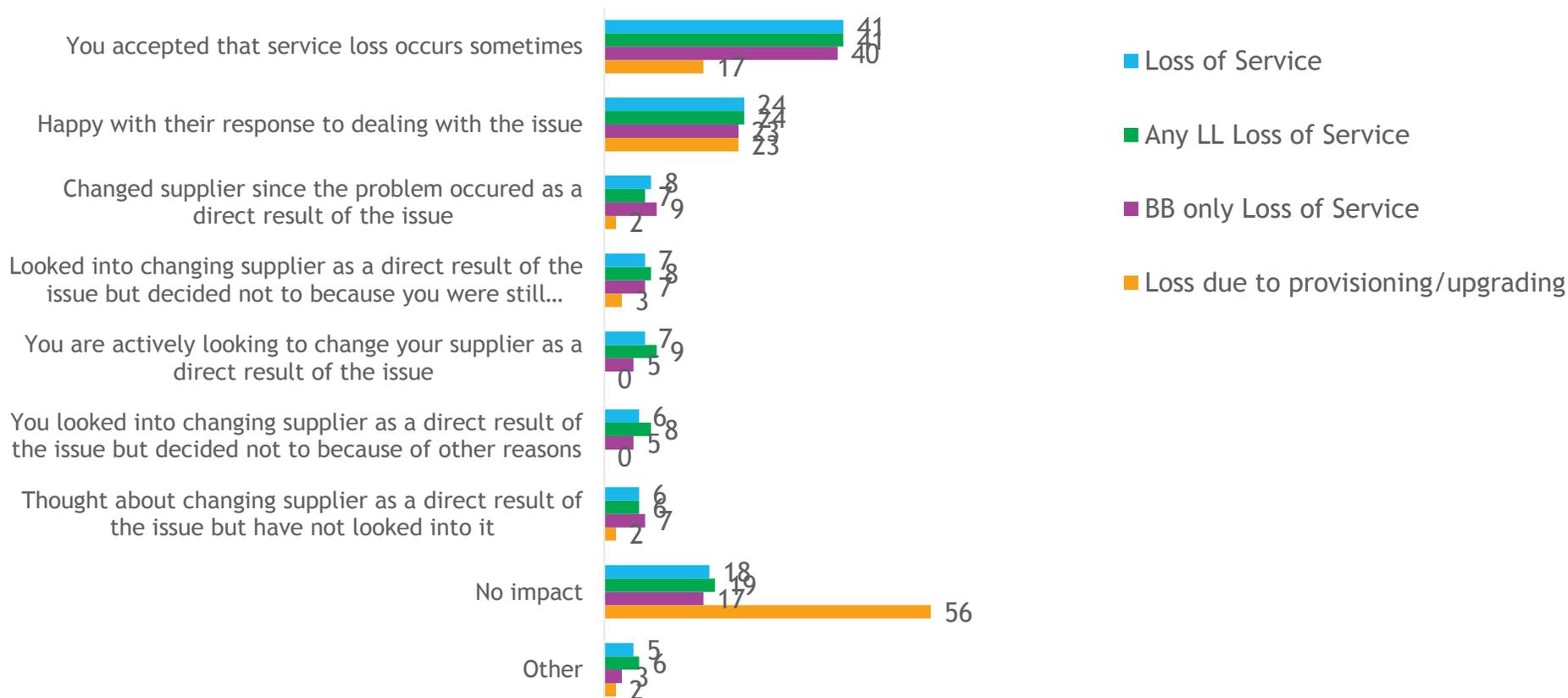
Level of payment enough to compensate household for impact (per day) £10

Due to the combination of questions this is based on a combined and unweighted sample, excluding those requesting compensation of > £1,000
 <H1g>: What was the monetary value of this compensation? Base: All that received compensation from the provider and found it reasonable at H1h (n=14) <H1i> How much would have been enough to compensate for the {problem} you experienced? Base: All that received compensation from the provider and did not find it reasonable at H1g (n=12) <H1k> Thinking back to the loss of service you have described and all of the impacts that the loss of service had on your household what level of payment do you think would be enough to compensate your household for that impact? All who experienced a complete loss of service but did not receive ask for or get compensation (n=281)

1 in 10 (8%) changed supplier as a direct result of their loss of service and a similar proportion either looked into changing but decided to stay (7%) or are actively looking to change (7%). 2 in 5 respondents accept that services losses occur from time to time and a quarter are happy with the response of their provider.

Experience of loss of service

Impact on attitudes to supplier relationship



H1m Taking everything into account that happened when you lost service, the processes you went through and the time taken to get your service restored, has this had any of the following effects on your attitudes towards your relationship with the supplier?

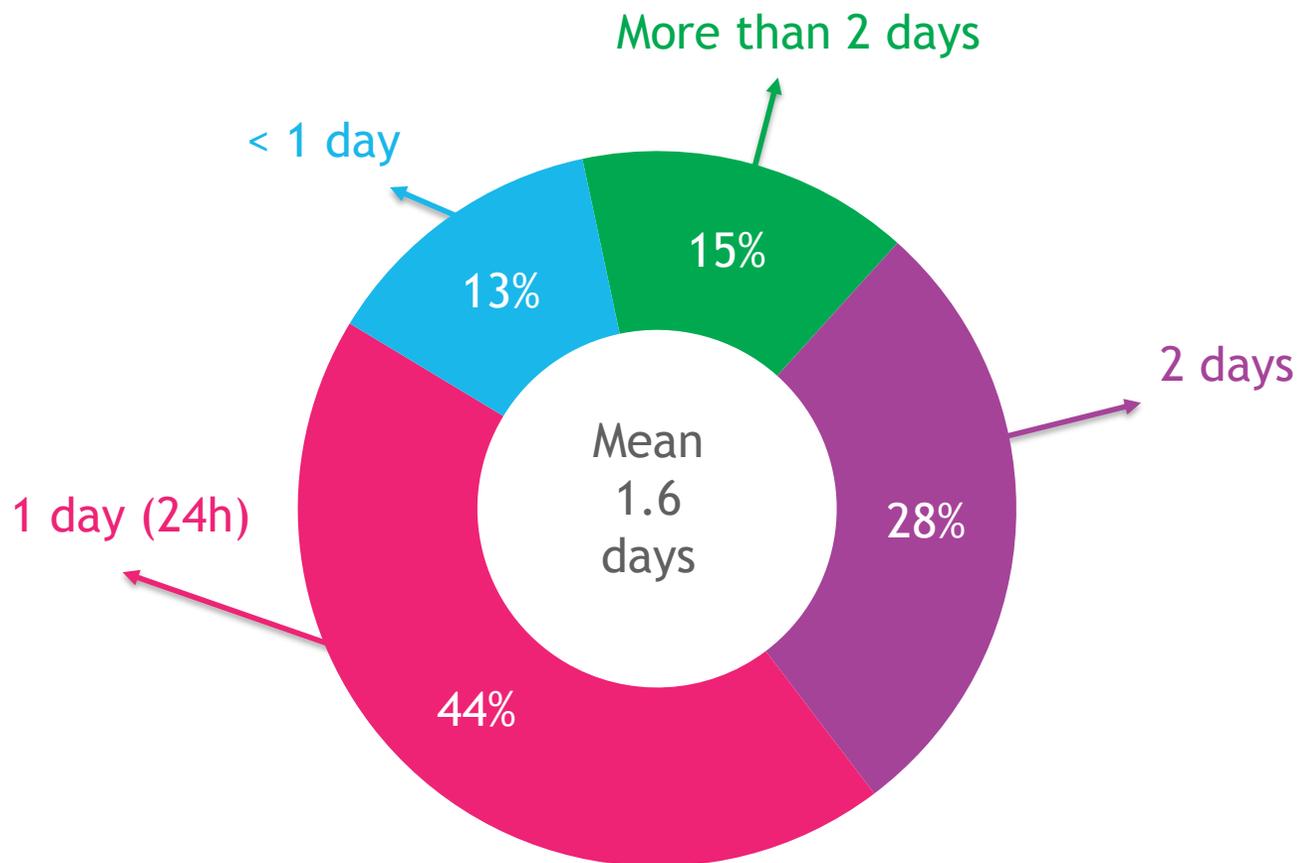
Base: All who experienced loss of service n=450, any landline (LL or LL&BB) loss of service n=222, BB only loss of service n=228, loss of service due to provisioning or upgrading n=63* *CAUTION LOW BASE

Section 6

Experience of missed appointments and compensation

1 ½ days, on average, is considered reasonable notice of a cancellation/change to an engineer appointment. Two-fifths would say 24 hours.

Reasonable notice for an engineer appointment to be cancelled or changed by provider



No difference by those that have had a service issue in the last 2 years

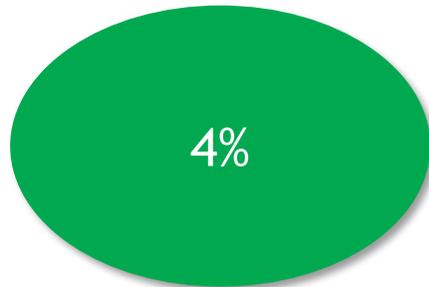
11 Some telephone line or broadband installation or repair processes require an engineer to visit the customer's home to carry out the work. Customers are usually given a specific time slot within which to expect the engineer's visit and sometimes engineers fail to arrive within the allotted time slot. What do you consider to be a reasonable amount of notice for an engineer appointment to be cancelled or changed by your provider? Please give your answer in hours or days.

Base: Total Sample Consumer n=2088

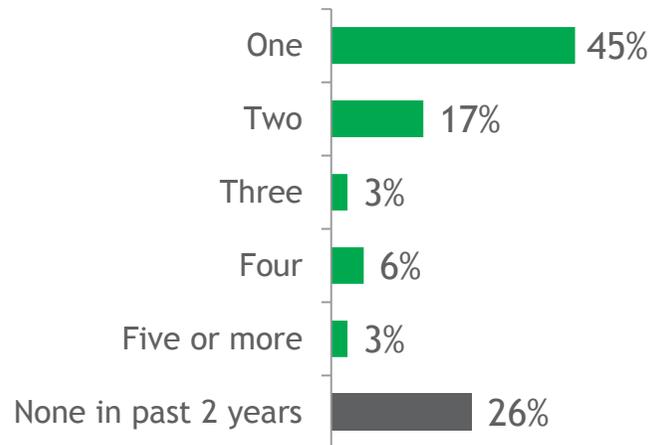
4% have had experience of a missed appointment. 3 in 5 of these rearranged their appointment for another day, whilst the engineer turned up later that day for 1 in five

Experience of a missed appointment

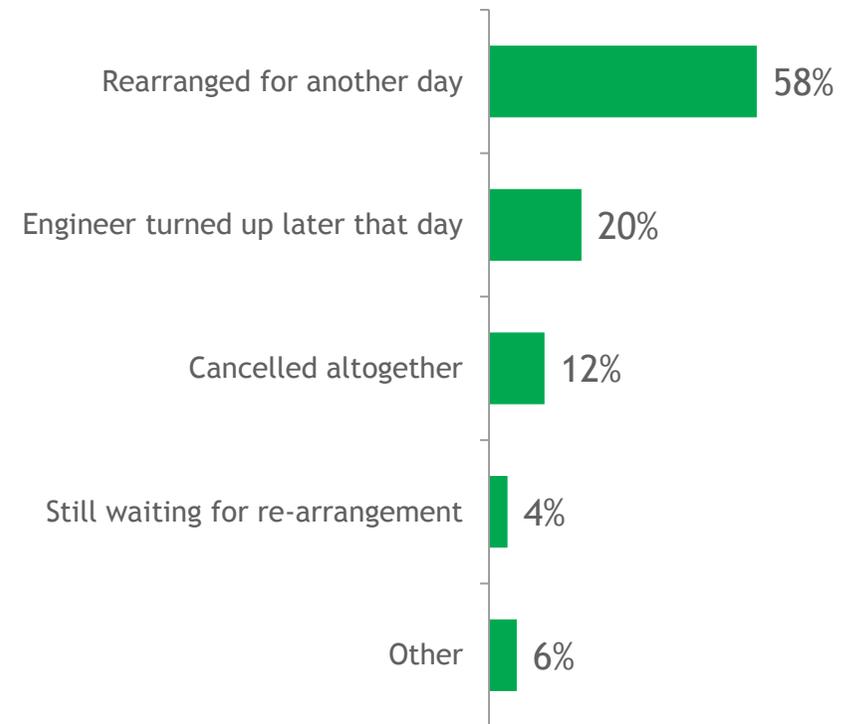
Ever experienced?



How many in last 2 years?



What happened after appointment missed?

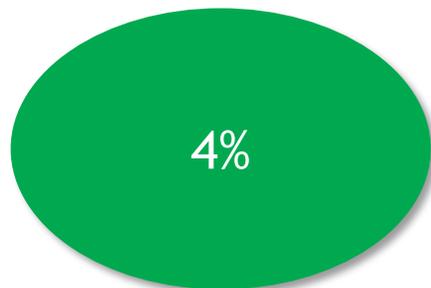


I2a Have you ever experienced a missed appointment regarding a landline and/or broadband service (i.e. where an engineer was scheduled to arrive at your home within a specified appointment window and did not turn up within that time)? This could be, for example, to install a new service or repair an existing service. Base: Total Sample n=2088. I2b Overall how many missed appointments have you experienced in the last two years? I3 What happened after the appointment was missed? I8 M9dHow much time did you and other people in your household spend trying to get another appointment? (e.g. time spent on the phone with your provider). It should not include the time spent while waiting for the original missed appointment. Base: all that experienced a missed appointment n=72* *CAUTION LOW BASE

On average, consumers spent 2 hours waiting for their engineer to arrive. The waiting meant that 3 in 5 couldn't do other things and it made 2 in 5 feel anxious. Only 1 in 3 were able to spend less than an hour rearranging their next appointment

Experience of a missed appointment

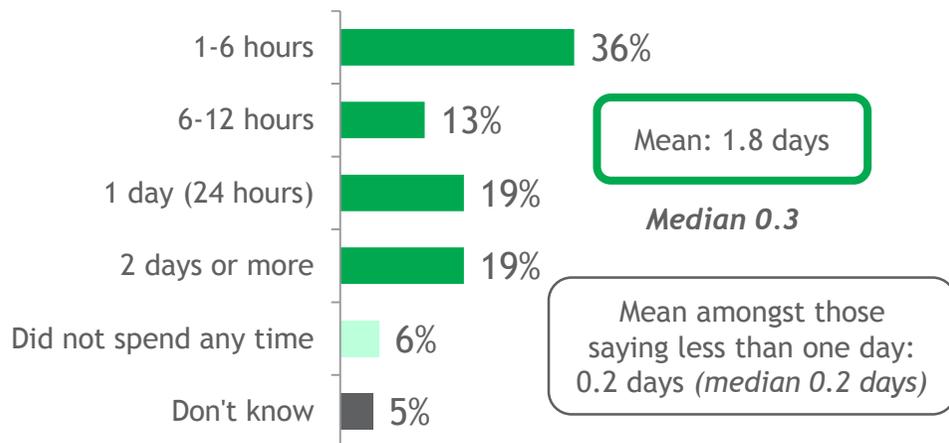
Ever experienced?



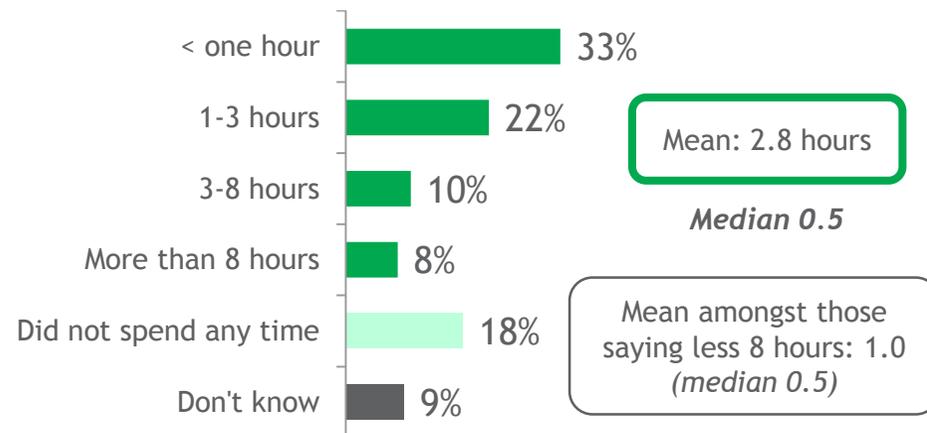
Which applied to most recent missed appointment?



Time spent waiting for engineer to arrive



Time spent trying to get another appointment

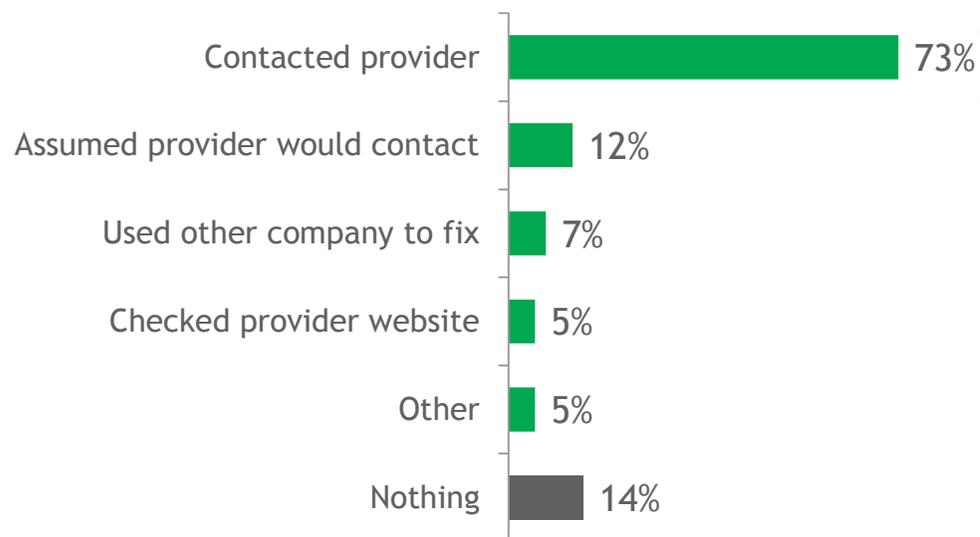


I2a Have you ever experienced a missed appointment regarding a landline and/or broadband service (i.e. where an engineer was scheduled to arrive at your home within a specified appointment window and did not turn up within that time)? This could be, for example, to install a new service or repair an existing service. Base: Total Sample n=2088. I4 How much time did you spend waiting for the engineer to arrive? I6 M4 Which, if any, of the following would you say applied to your most recent missed appointment? I7 M11 Which of the following actions did you or other people in your household take to rearrange the appointment that had been missed? Base: all that experienced a missed appointment n=72* CAUTION LOW BASE

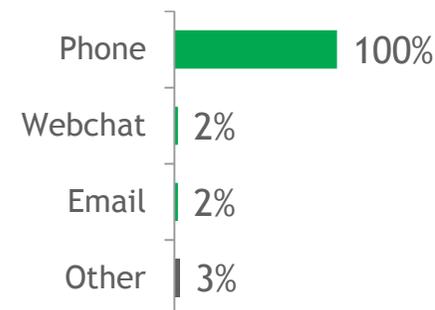
Three quarters (73%) contacted their provider to re-arrange the appointment. All used the phone. Only 2 in 5 (43%) needed to contact their provider once

Experience of a missed appointment

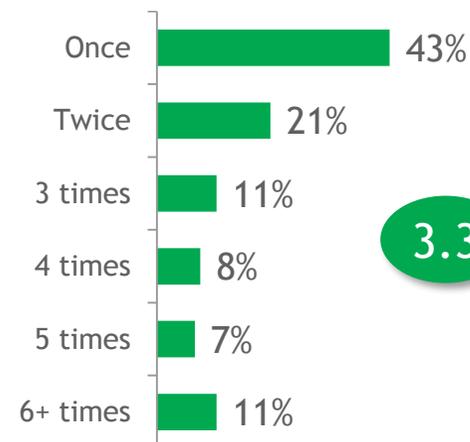
Actions taken by you/household to re-arrange



How contacted?



How many times contacted provider?



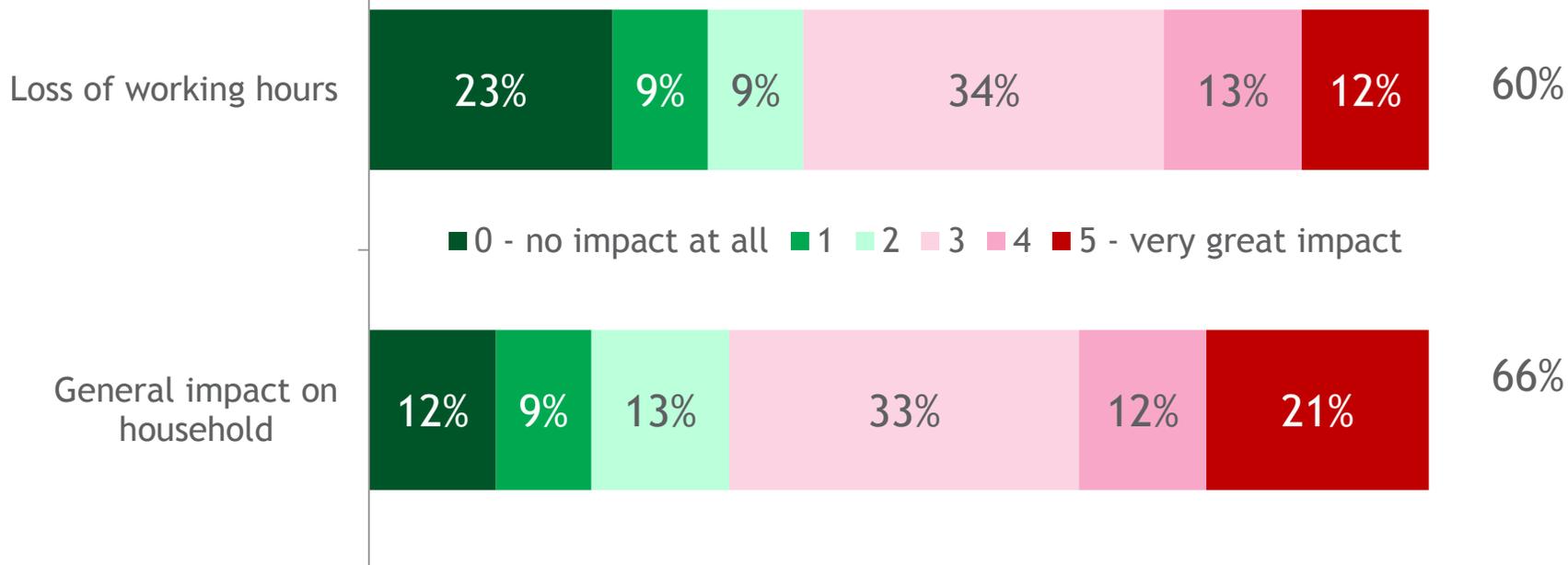
3.3

3 in 5 claim that the loss in working hours that resulted from the missed appointment had a negative impact on their household

Experience of a missed appointment

Impact of the missed appointment on household

% had an impact



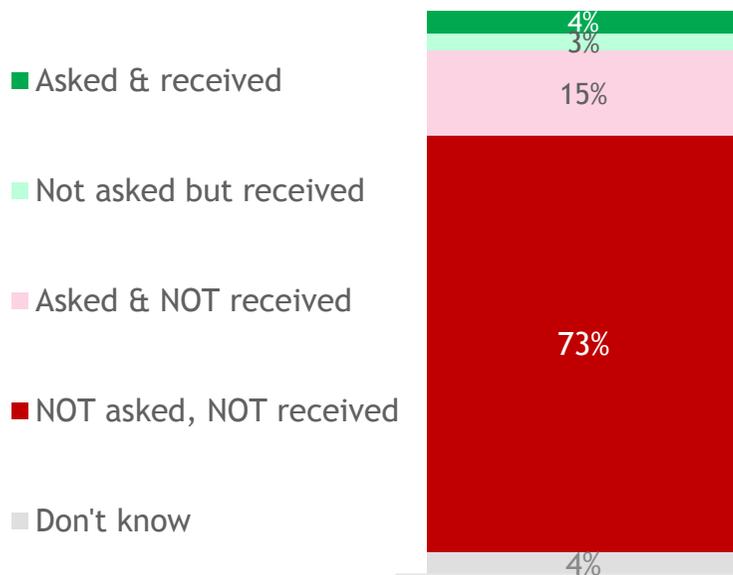
I11 How much of an impact did this loss of working hours, have on your household Please use a scale of 0 to 5 where 0 denotes "No impact at all" and 5 denotes "Very great impact". I5 Thinking back to when you experienced a missed appointment, how much of an impact did this have on you and your household? Please use a scale of 0 to 5 where 0 denotes "No impact at all" and 5 denotes "Very great impact". Base: all that experienced a missed appointment n=72* *CAUTION LOW BASE

Overall, only 8% received compensation for their missed appointment

Missed appointment compensation

NET compensation received

8%



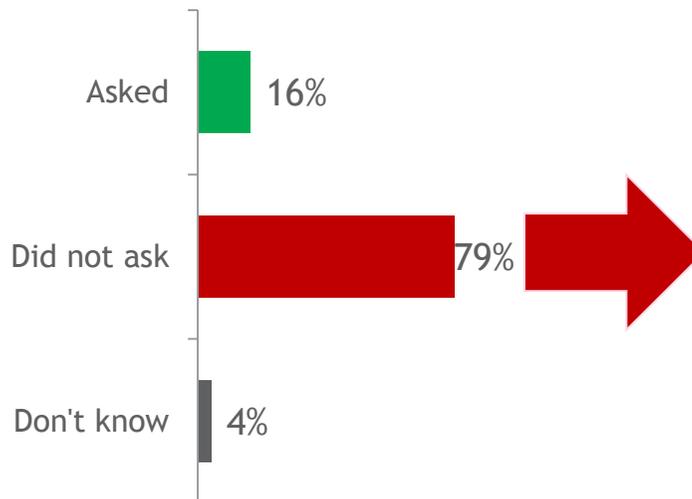
Only 8% had received compensation for their missed appointment. The vast majority did not ask for compensation - key reasons being a lack of expectation, a belief that it wouldn't be worth it and a lack of knowledge about how to do it

Experience of a missed appointment

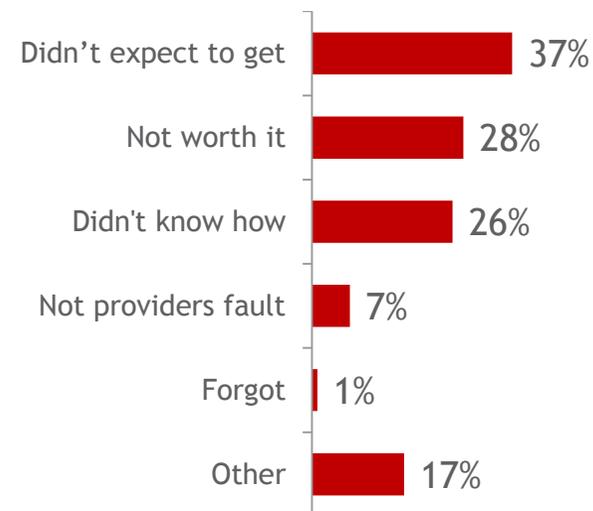
Received compensation for missed appointment?

YES
8%

Asked for compensation?



Why not ask?



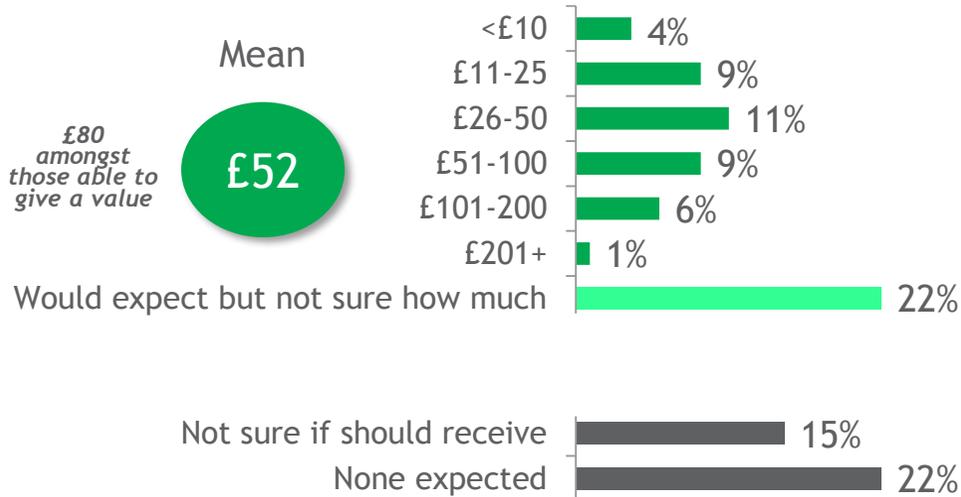
NO
92%

I12a M16 Did you receive any compensation from your provider for this missed appointment? Base: all with missed appointment n=72* I12bi Did you ask for compensation in regards to the missed appointment? We are referring to you proactively asking for compensation rather than simply notifying your provider of the missed appointment. Base: all who did not receive compensation n=65* I12c M18a Why did you not ask for compensation? Base: all who did not get or ask for compensation n=52*.
*CAUTION LOW BASE

41% of consumers expect to be compensated for a missed appointment. On average, they would expect approximately £50 - to be paid as a credit on their account or in cash

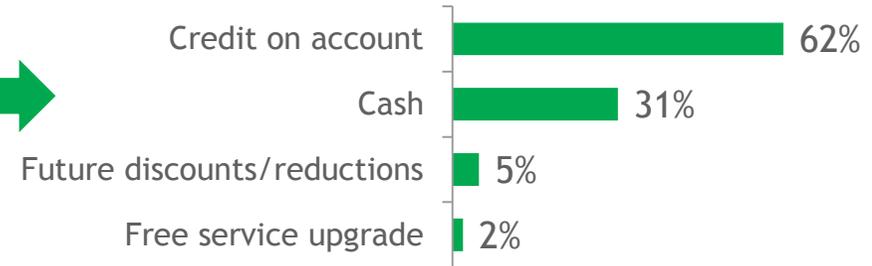
Hypothetical missed appointment

Expect to be compensated for a missed appointment?



41%

Form would expect compensation to take



Why not expect to receive compensation?



36%

I13a I'd like you to imagine a situation where you had been given an appointment time by your supplier for an engineer to visit your home to install, repair or upgrade one of your services and the engineer did not turn up at all. Would you expect to be compensated for this missed appointment? and if so, how much? Base: all consumer that have NOT experienced a missed appointment n=2016

I13b M23 Why would you not expect to receive any compensation for the missed appointment? Base: all not expecting compensation n=733

I12c M24 What form would you expect that compensation to take? Base: all expecting compensation and giving an amount n=819



Automatic compensation :
Consumer experience of provisioning delays, loss of
service and missed appointments

Fixed Line Research:
SMEs



Fixed line research: SME executive summary (1)

- ❑ More than half say their business would **struggle to cope without fixed broadband and landline**. However, the importance of landline is linked to its role in providing broadband
 - Larger SMEs (10+ emps) are more reliant upon broadband and landline services
- ❑ **Price dominates** as the influencing factor in provider choice
 - Larger SMEs are more likely to cite broadband speed
- ❑ **3 in 5 (59%) have switched any fixed line service in the past 5 years**
 - 27% have switched both, 18% broadband (only) and 14% landline (only)
- ❑ **39% have experienced a complete loss of fixed line service**
 - On average, the LoS lasted c5 days (c3 days for larger SMEs)
- ❑ **89% reported their LoS to their provider (96% of larger SMEs)**. They waited 5 hours before reporting it and service was restored after 5.3 days (3.4 days for Larger SMEs)
- ❑ **Half (48%) are satisfied** with their providers ability to resolve their LoS. SMEs also become **increasingly dissatisfied after waiting 3 days** for their restoration
 - <1day = 74% satisfied, 1-3 days = 49% satisfied, 4+ days = 12% satisfied
- ❑ **Three fifths (61%) felt their LoS had a negative impact on their business generally** (73% respectively for Larger SMEs)
- ❑ **The LoS prevented people working in 2 in 5 businesses**. On average, 26 working hours were lost in these businesses

Fixed line research: SME executive summary (2)

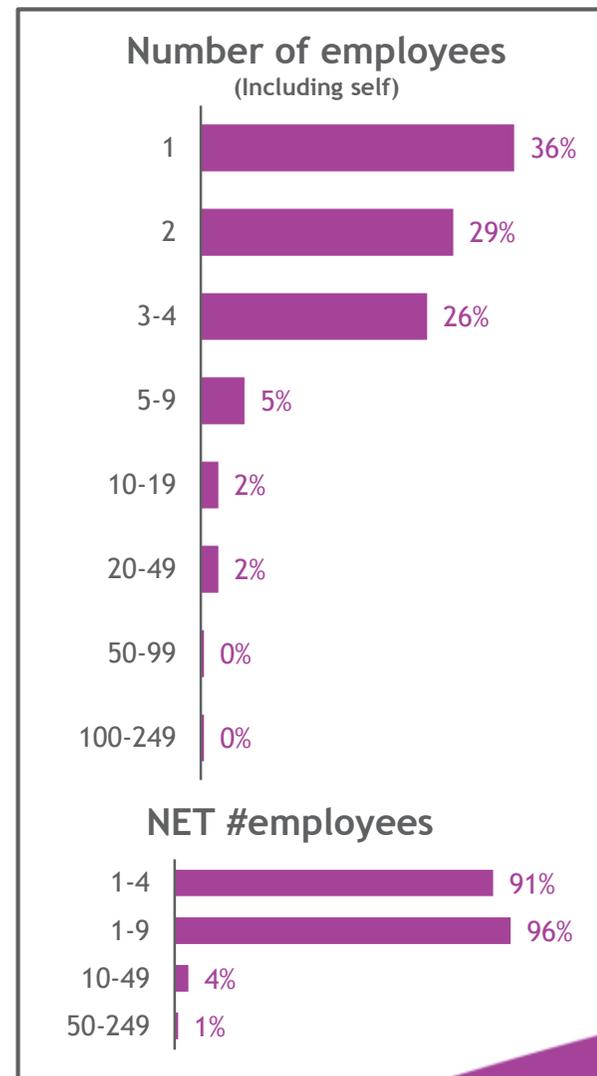
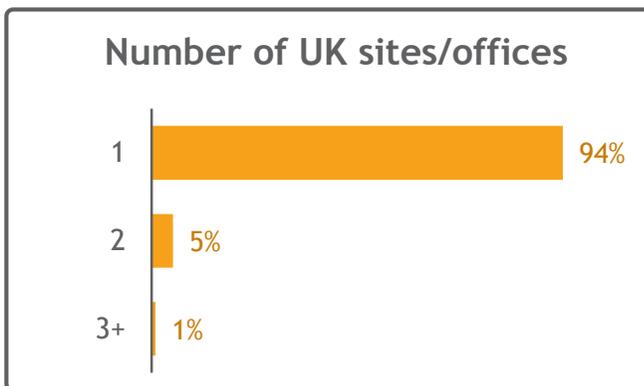
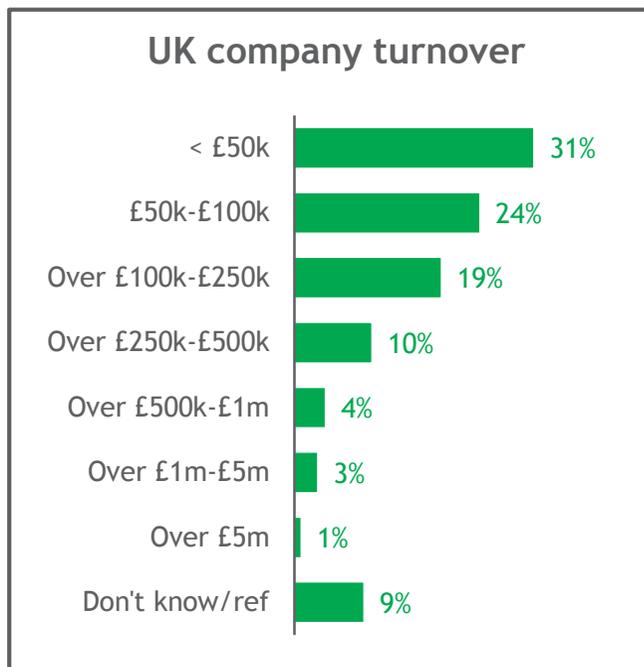
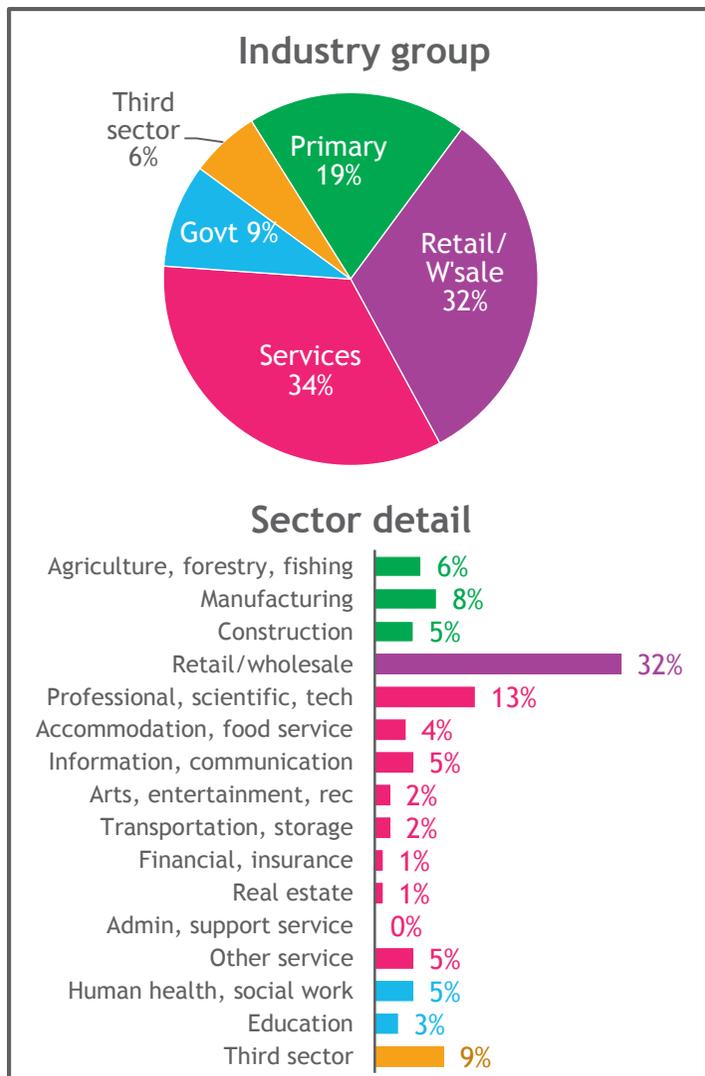
- ❑ 11% received compensation for their LoS, with 6% asking for it. Of those that did not receive compensation, 10% asked for it and 89% did not (2% didn't know)
- ❑ After probing, 39% expect to be compensated for the impact of their LoS. On average, they expect c£160 (c330 for larger SMEs) - to be paid as an account credit or cash
- ❑ 1 in 20 (6%) changed supplier as a direct result of their LoS. 1 in 7 looked into it, but stayed as they were within their minimum contact period (14%) and 1 in 10 looked into it, stayed for other reasons (9%)
- ❑ On average, 1 days notice is 'reasonable' for a change to an engineer appointment
- ❑ 7% have ever experienced a missed appointment (18% of larger SMEs), with 6% doing so in the last 2 years
 - Affected SMEs spend 9 hrs waiting for an engineer
 - This negatively affects 94%
 - They spend 5½ hrs trying to set up another appt (2 hrs for larger SMEs).
 - Almost all use the phone channel and, on average, they make contact 3 times
 - These SMEs lose c12 working hrs as a result of their missed appt(s)
- ❑ Only 4% received compensation for their missed appt, with 2% asking for it. Of those that did not receive compensation, 15% asked for it and 85% did not
- ❑ After probing, 59% of SMEs expect to be compensated. On average, they expect c£45 (larger SMEs expect c£190), to be paid as a credit on their account or cash

Section 1

Firmographics, Services used

Key sample criteria: Firmographics

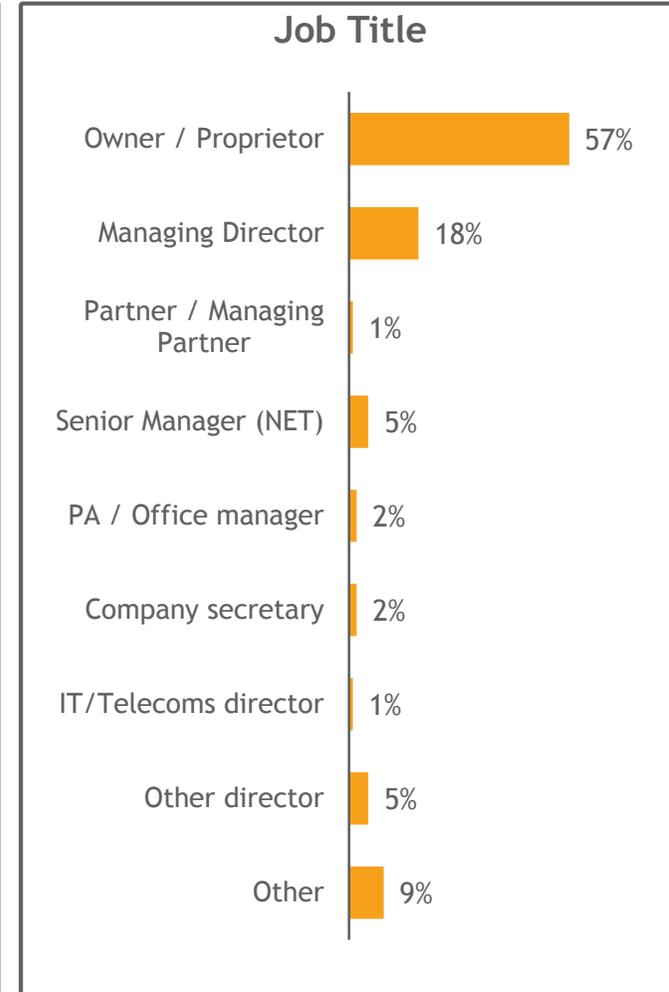
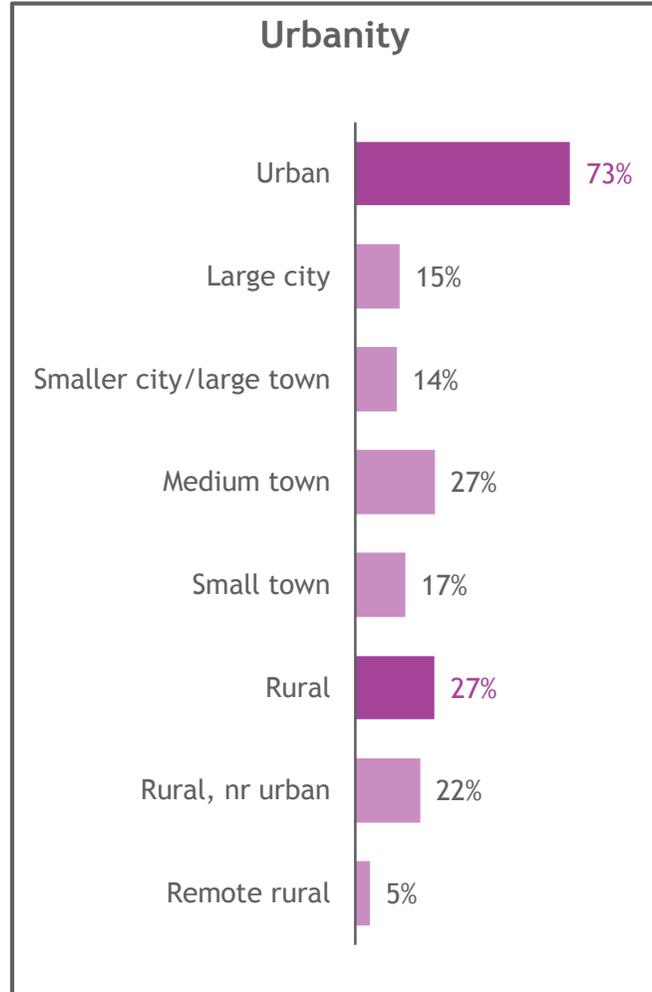
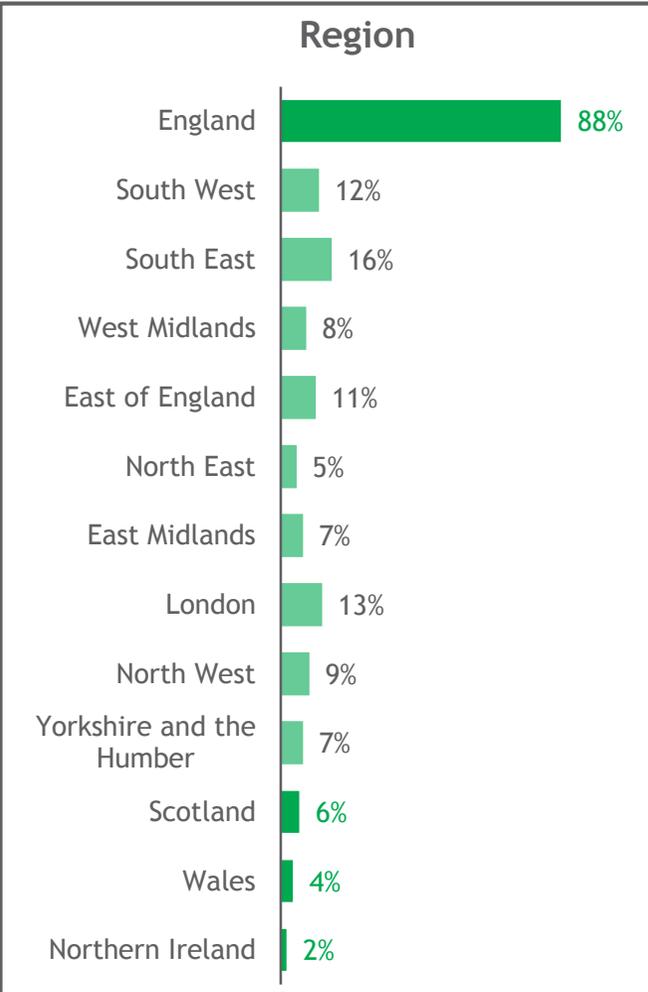
Industry sector and Company size



F4 into which of the following bands does the company turnover in the UK fall? B1 How many employees (including yourself) are there in the company in the UK, including both fulltime and part time workers? B2b. How many sites or offices does your organisation operate from in the UK, including this one? B4a SIC code (from sample)
 Base: All SME n=1006

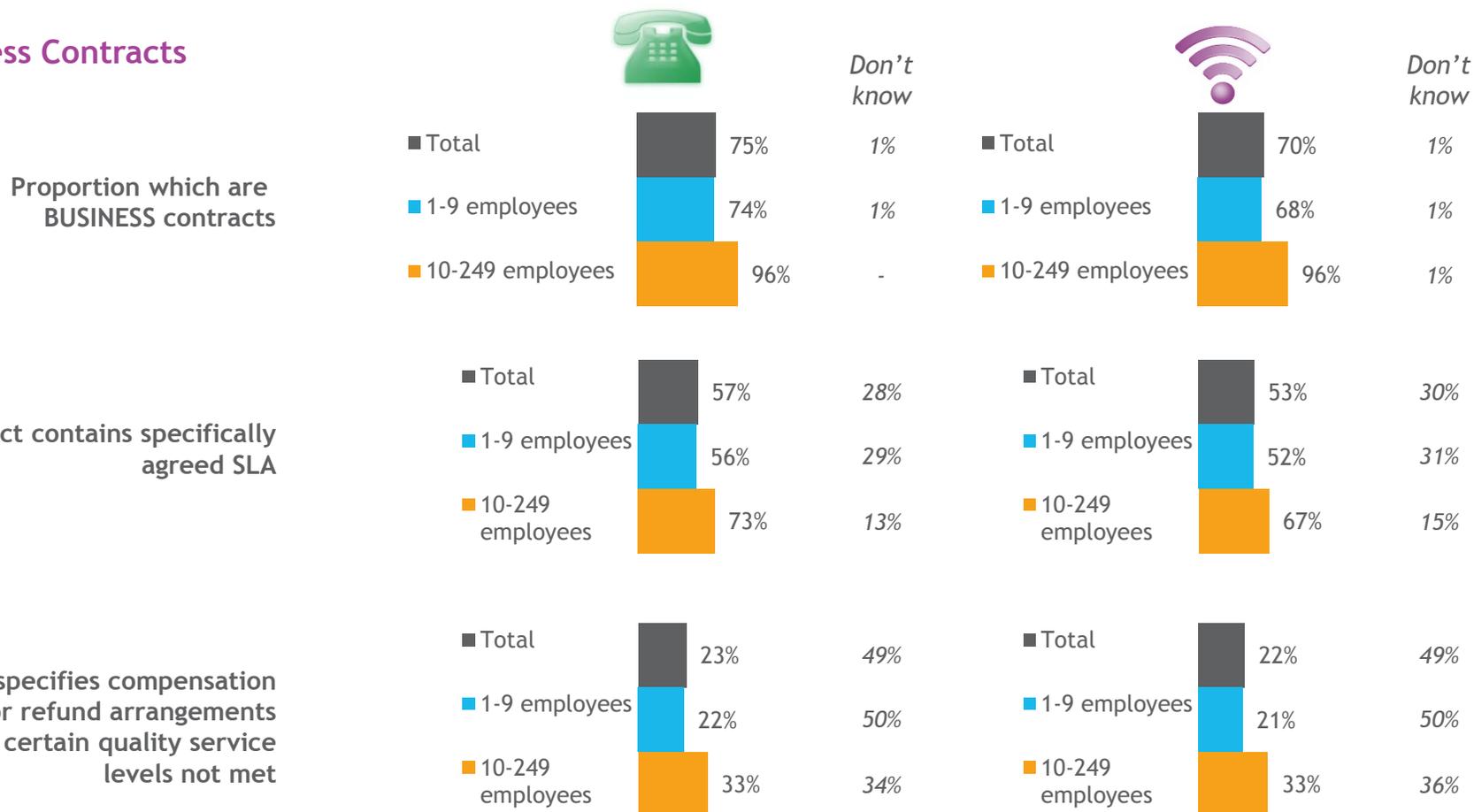
Key sample criteria: Country/region, urbanity and job title

Location



75% of landline and 70% of broadband are business contracts (significantly higher in larger SMEs). Around half of these contracts contain SLAs and around a fifth specific compensation/refund arrangements (again, both higher in larger SMEs)

Business Contracts

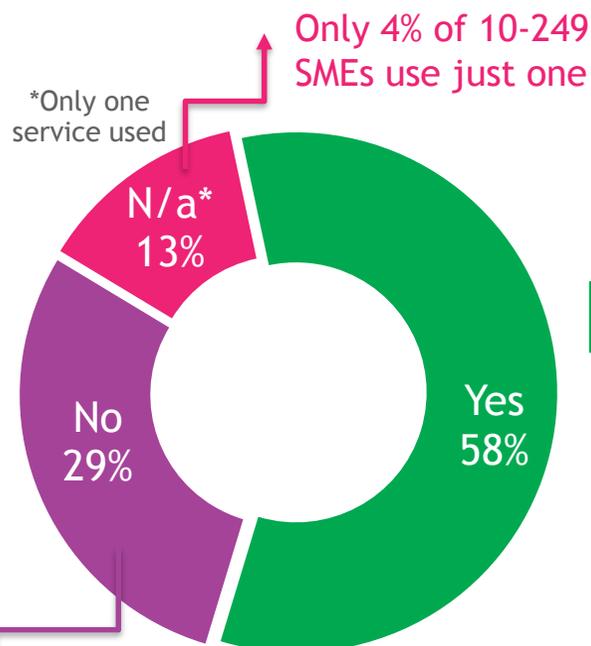


B8A Does your company have a specific business contract for your landline service or do you just have an ordinary residential contract? Base: all with landline n=957, 1-9 employees n=624, 10-249 employees n=333. B8C Does the contract contain specifically agreed levels of service quality (a Service Level Agreement), for example an agreement to repair faults within a certain time frame? B8D Does the contract specify compensation and/or refund arrangements if certain quality service levels are not met? Base: all with landline business contract n=816, 1-9 employees n=491, 10-249 employees n=325. B11A Does your company have a specific business contract for your broadband service or do you just have an ordinary residential contract? Base: all with broadband n=873, 1-9 employees n=544, 10-249 employees n=329. B11C Does the contract contain specifically agreed levels of service quality (a Service Level Agreement), for example an agreement to repair faults within a certain time frame? B11D Does the contract specify compensation and/or refund arrangements if certain quality service levels are not met? Base: all with broadband business contract n=724, 1-9 employees n=408, 10-249 employees n=316.

58% of SMEs buy any communications services in a bundled package. This is likely to be a bundle of landline and broadband

Bundling of services

Any services bundled together from the same supplier?



Only 4% of 10-249 SMEs use just one

*Only one service used

45% of 10-249 SMEs do NOT bundle



Almost all those bundling have one bundle with one supplier (98%). 2% have two bundles.

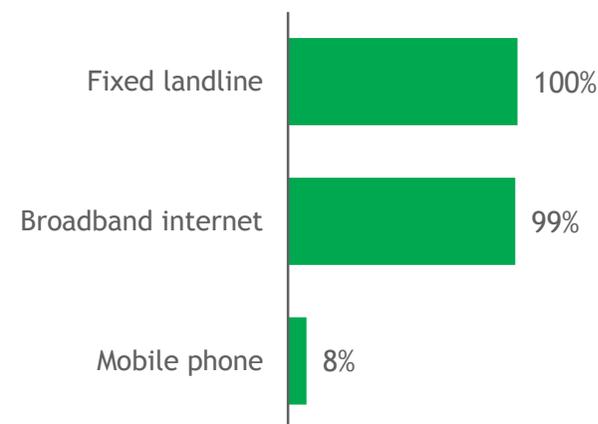


6% of all with bundle



92% of all with bundle

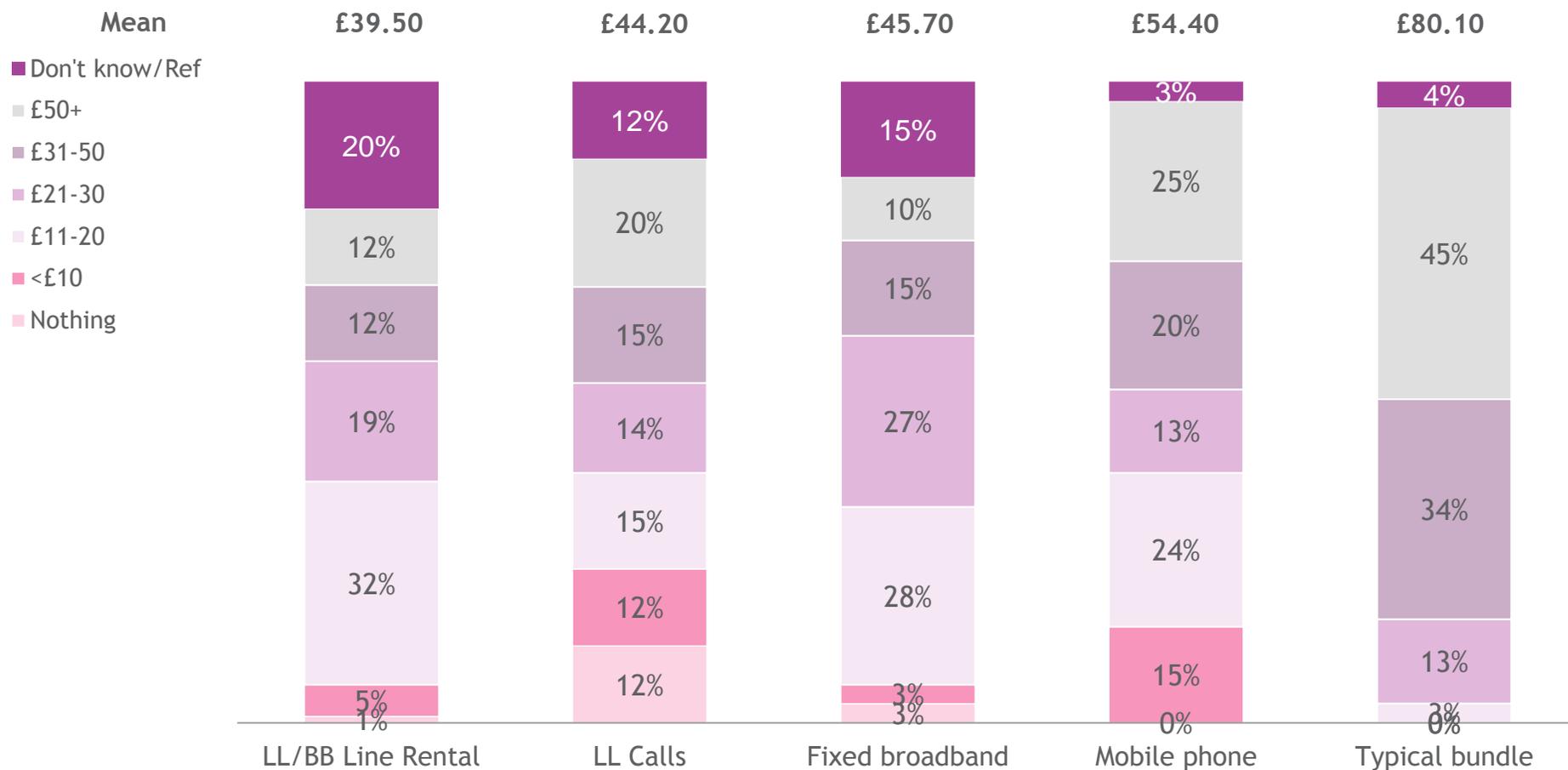
Services bundled (all bundles)



1% of all with bundle

Average bundle spend is c£80 per month

Monthly spend on telecoms services



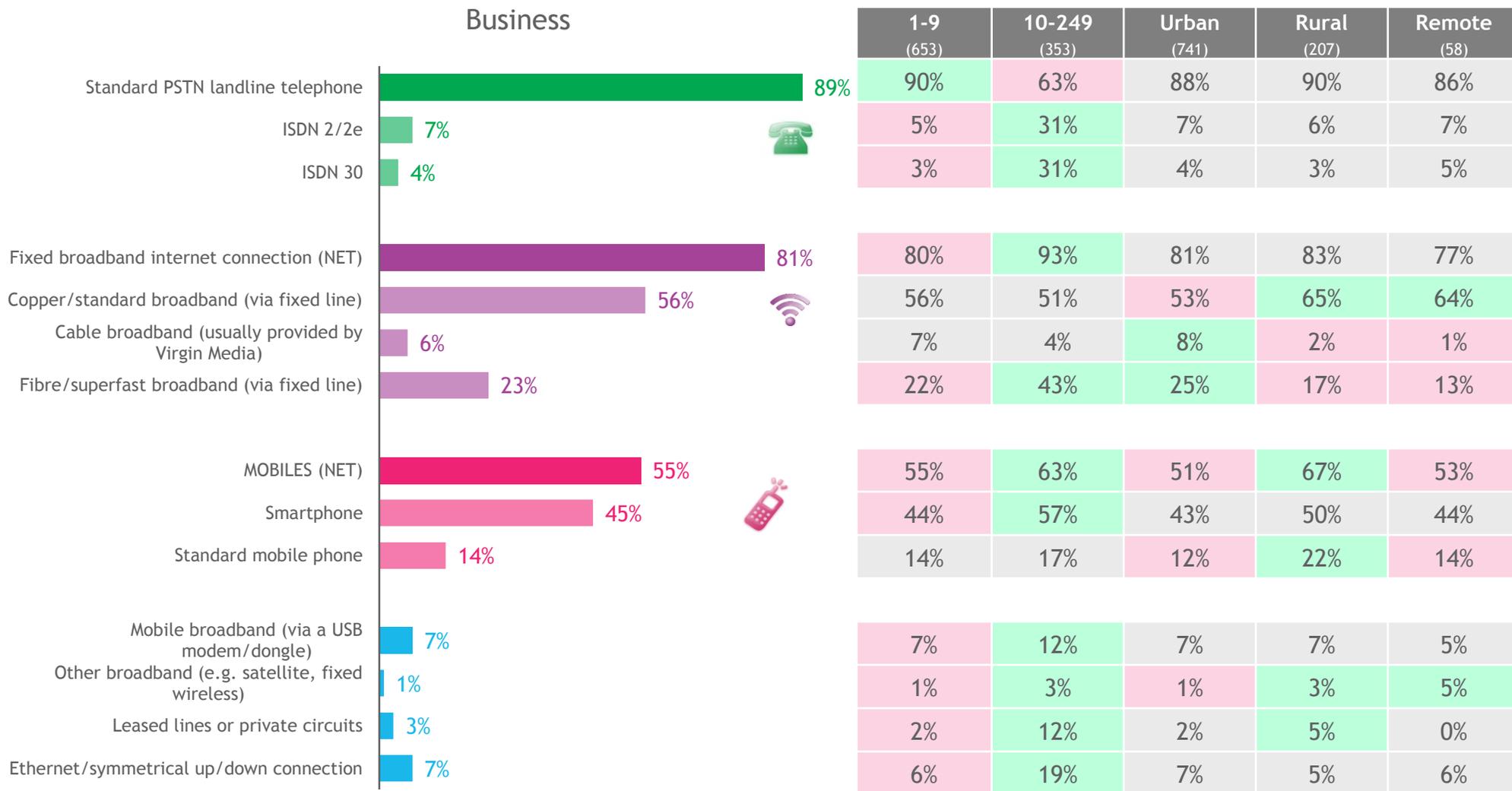
As expected, total annual spend increases with size of SME. Average annual spend is c£1,340

Total annual spend on telecoms services



Larger SMEs have more sophisticated services (e.g. ISDN, fibre/superfast, smartphones).
Cable and fibre/superfast associated with urban areas.

Communication services currently used

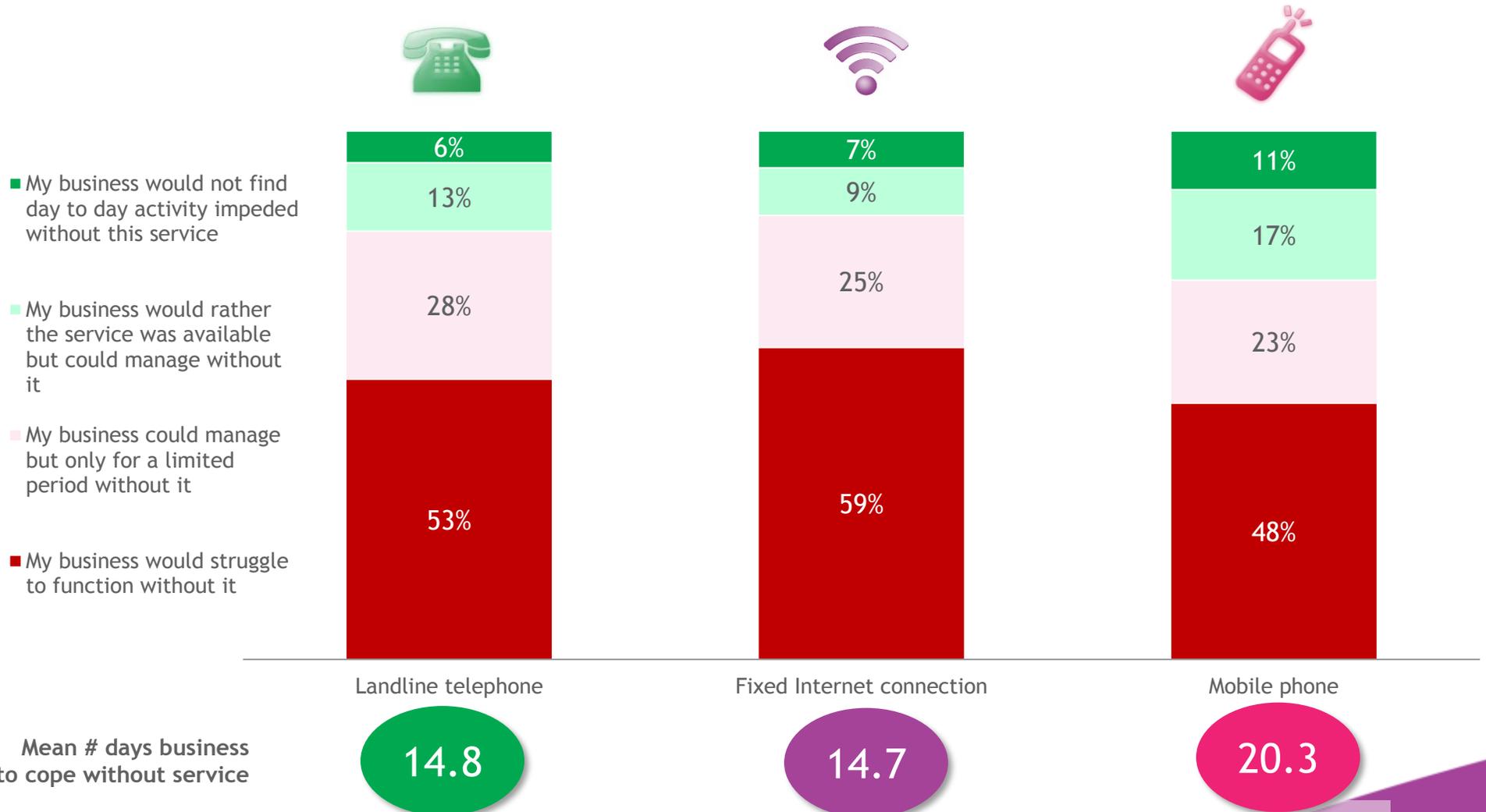


Section 2

Reliance on Services, Switching behaviour

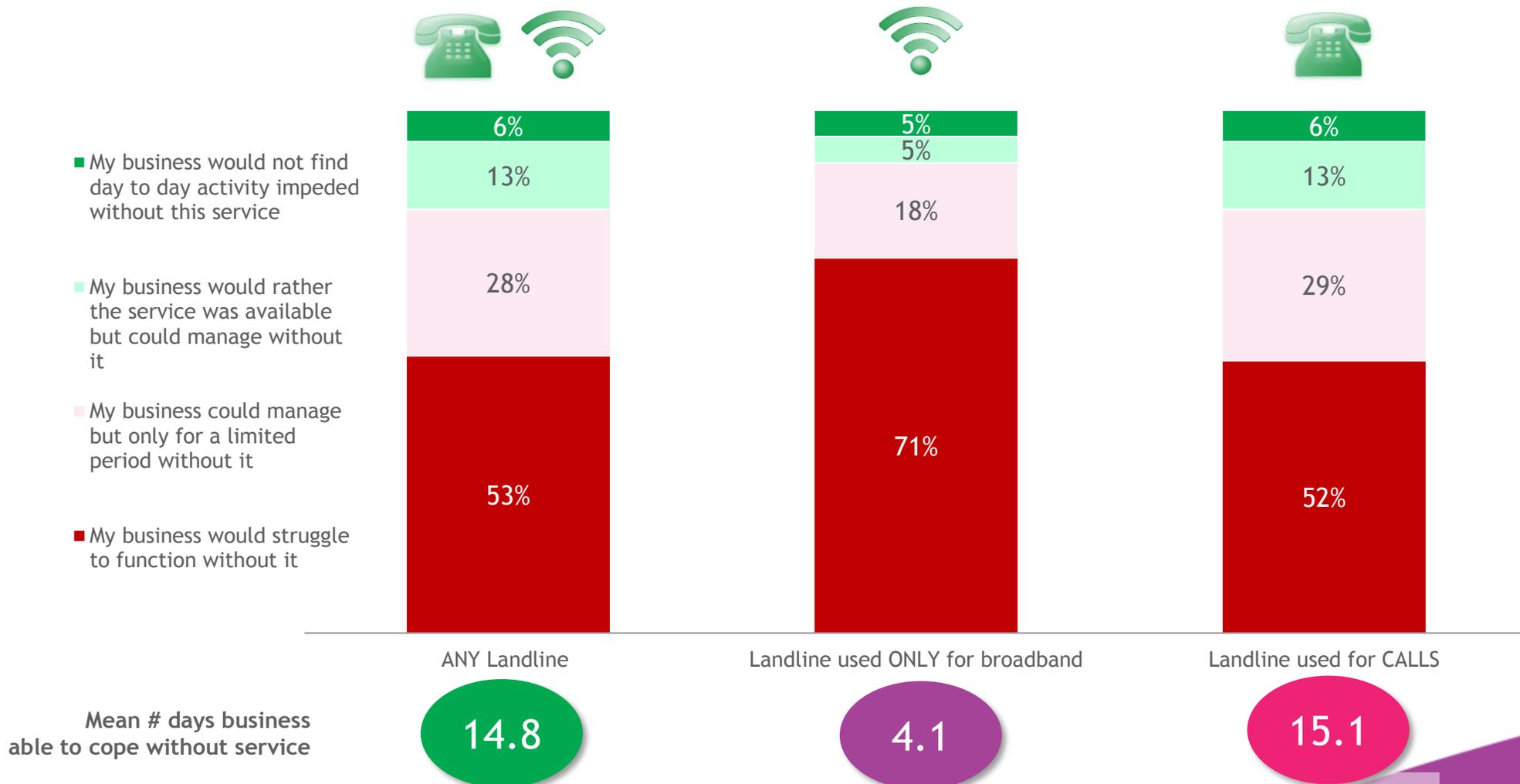
More than half feel their business would struggle to cope without fixed broadband or landline

Importance of telecoms services currently used



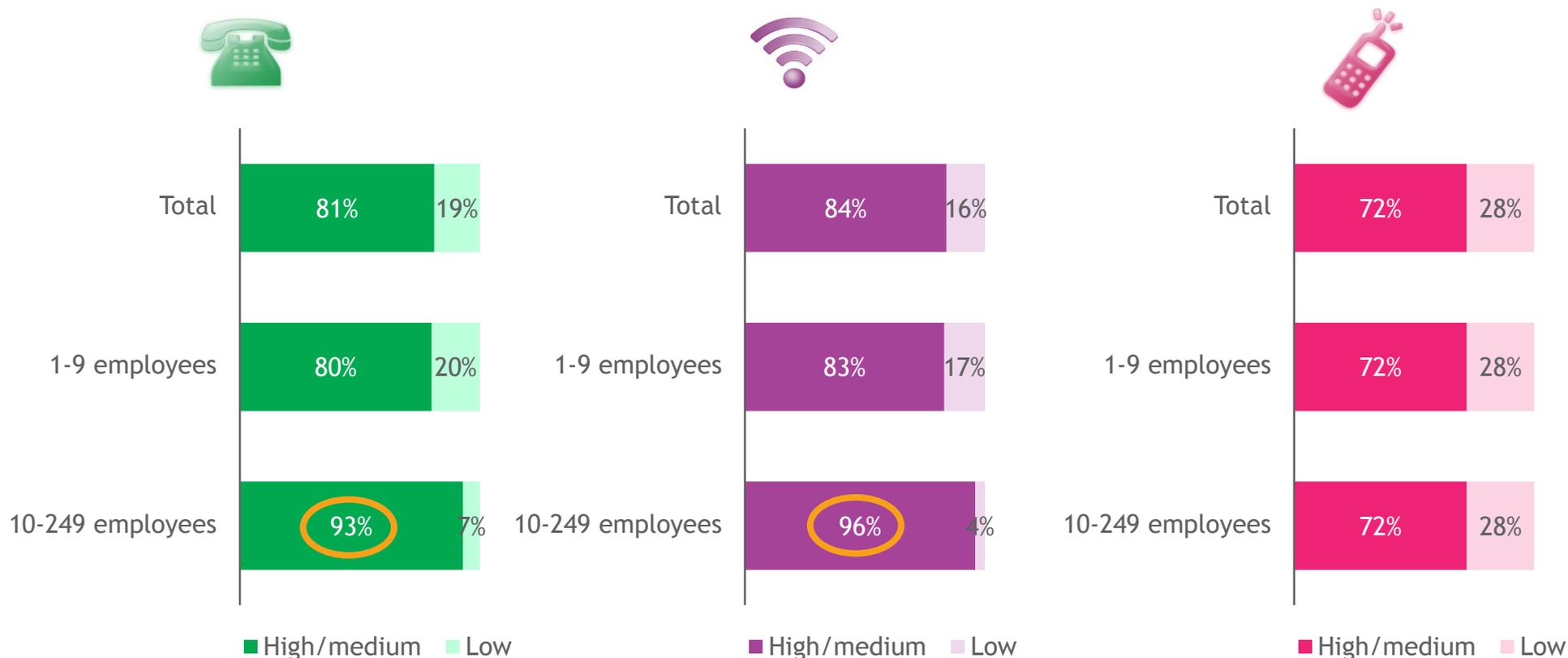
Importance of landline to businesses is likely to be linked to its role in providing broadband rather than calls

Importance of telecoms services currently used



Larger SMEs significantly more reliant upon broadband and landline services compared to smaller businesses. No difference in reliance upon mobiles.

Level of reliance upon of telecoms services currently used

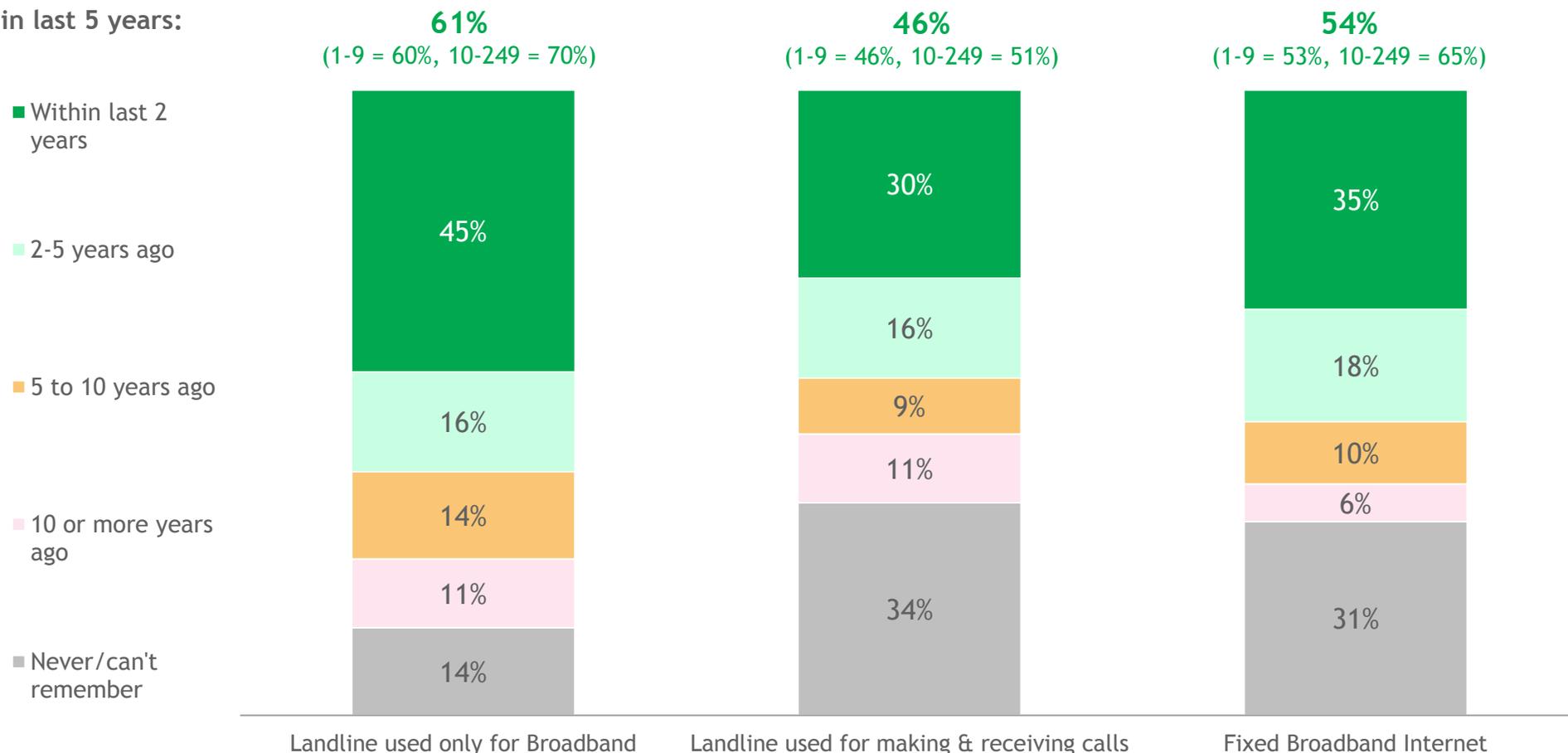


High/medium: My business would struggle to function without it/could manage but only for a limited period without it
 Low: My business would rather the service was available but could manage without it / would not find day to day activity impeded without this service

Internet likely to have been changed/ upgraded more recently than landline for calls. Especially the case for larger SMEs

When last changed supplier or upgraded existing service

Within last 5 years:

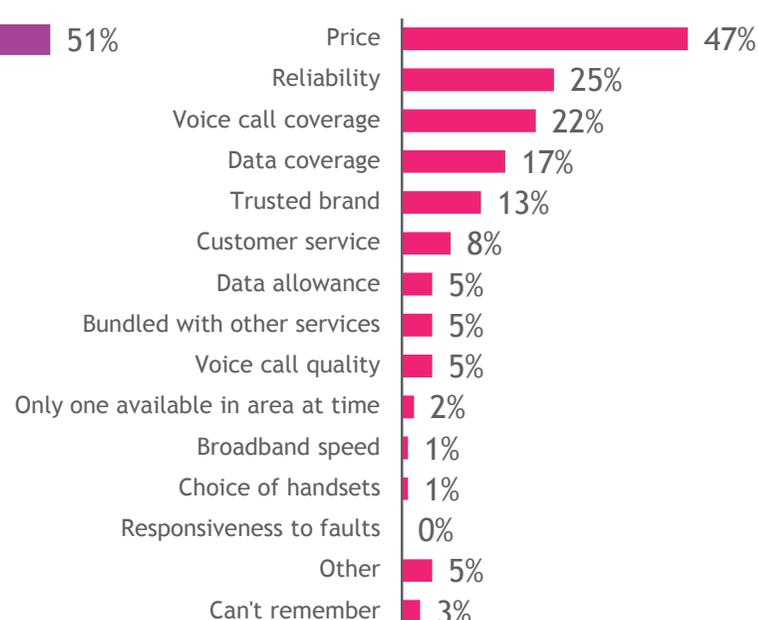
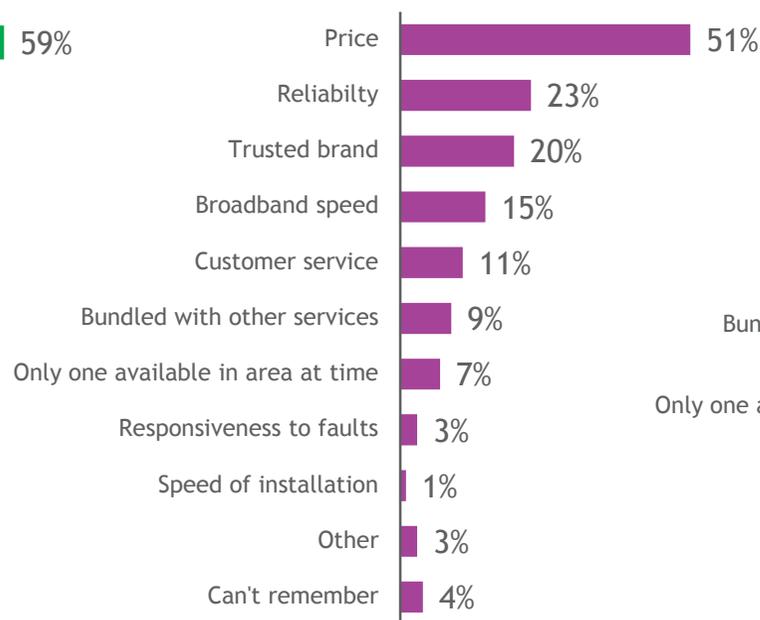
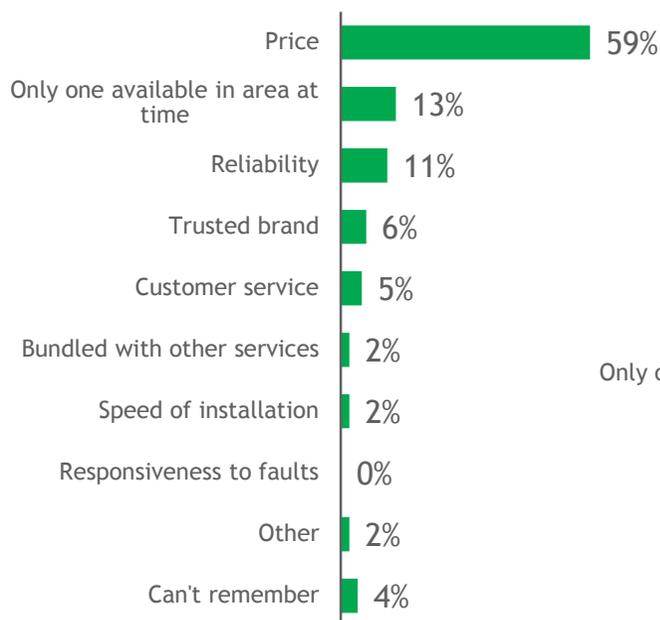


C1 When did you last change your (service) supplier or upgrade your existing service with the same supplier?

Base: All with LL used only for BB n=232 (1-9 n=114/10-249 =118), all with LL used for making/receiving calls n=889 (1-9 n=585/10-249 =304), all with fixed broadband internet n=873 (1-9 n=544/10-249 =329),

Price dominates as the influencing factor in provider choice. Larger SMEs (10-249 emps) less likely to cite this, and more likely to cite broadband speed

Main factors that influenced choice of provider (unprompted)



- Only 39% of 10+ SMEs cite price vs. 52% of 1-9
- 24% of 10+ SMEs cite broadband speed vs. only 15% of 1-9

- 14% of 10+ SMEs cite customer service vs. only 8% of 1-9s

C2a/b/c. Thinking back to when you chose your (service), what were the main factors that influenced your choice of provider?

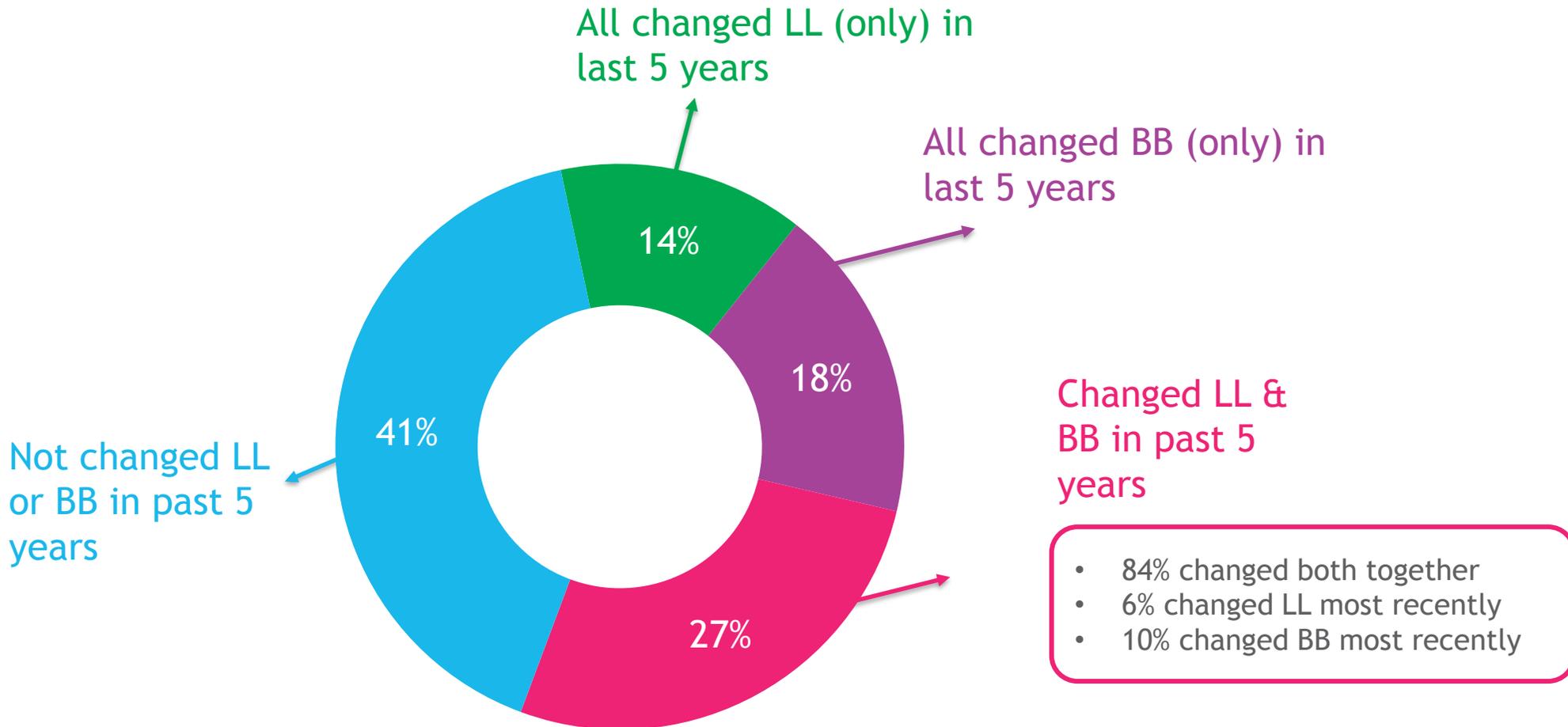
Base: All that have a landline but no fixed broadband and changed their provider in the last 10 years n=72, all that have a fixed broadband connection and changed their provider in the last 10 years n=635, all with a mobile service n=577

Section 3

Experience of and impact of loss of service/delayed provisioning

Almost 6 in 10 (59%) have switched any of landline or broadband in the past 5 years

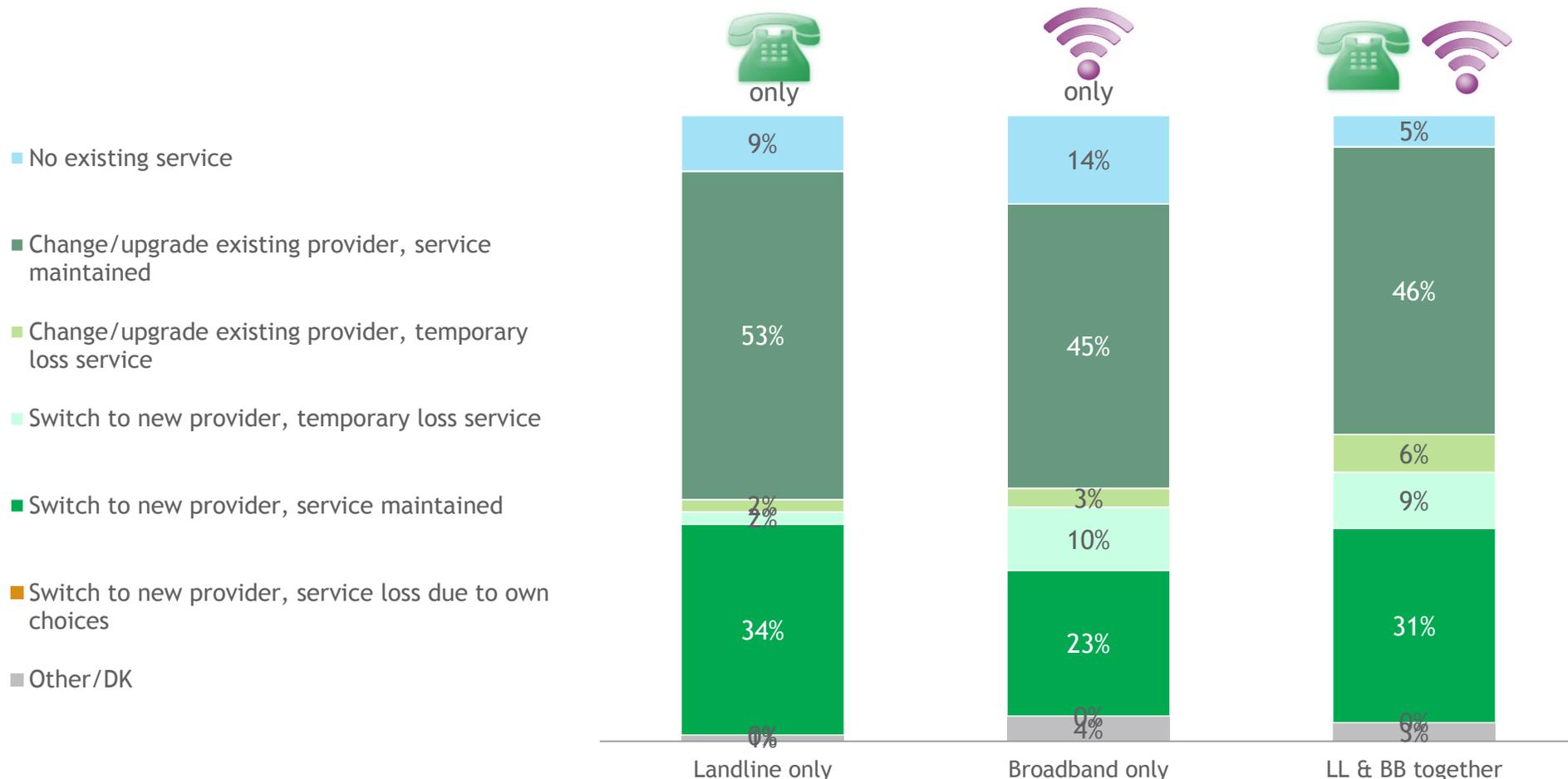
Switching providers/services



C1 When did you last change your supplier or upgrade your service with existing supplier? Base: All with LL used only for BB n=232, all with LL used for making/receiving calls n=889, all with fixed broadband internet n=873. E1a You said earlier that you have changed or upgraded your landline and broadband services in the last two/five years. Did you change both services at the same time to the same provider? Base: All that changed or upgraded their landline or broadband in the last five years n=348. E1b Which service did you change or upgrade more recently? All that did not change both services at the same time n=74*

SMEs are most likely to change/upgrade with their existing provider

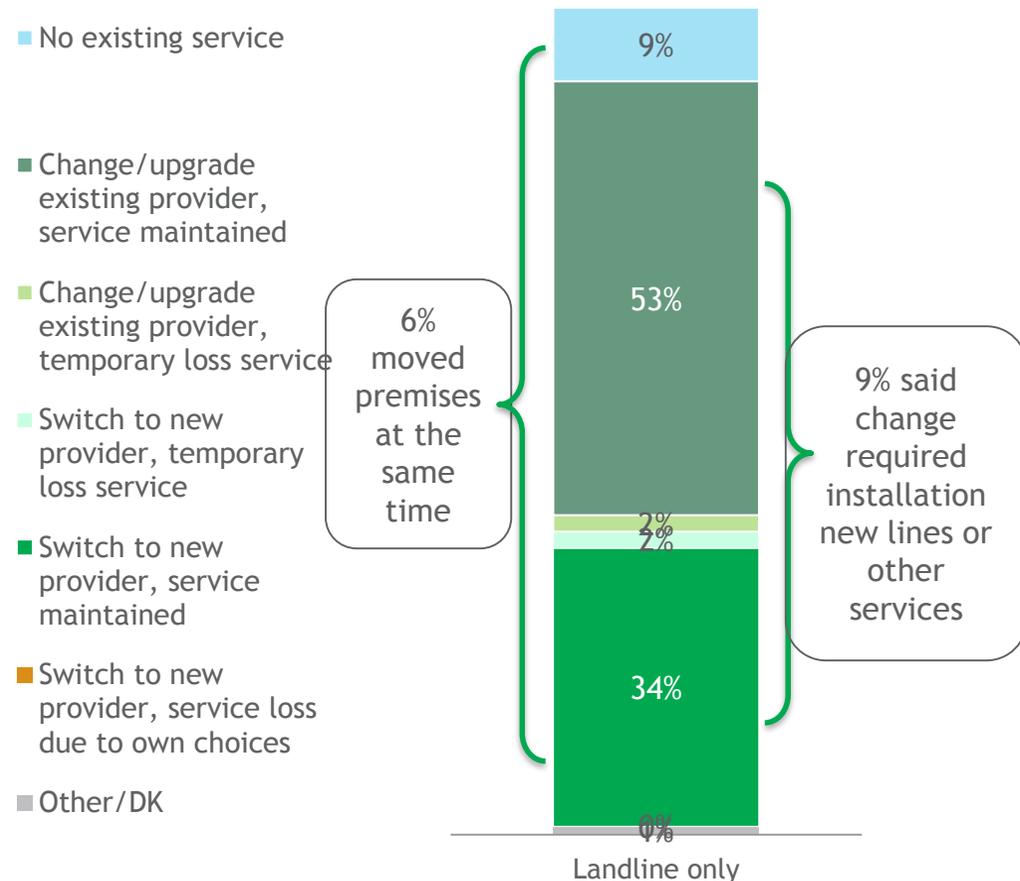
Scenario last time changed or upgraded service



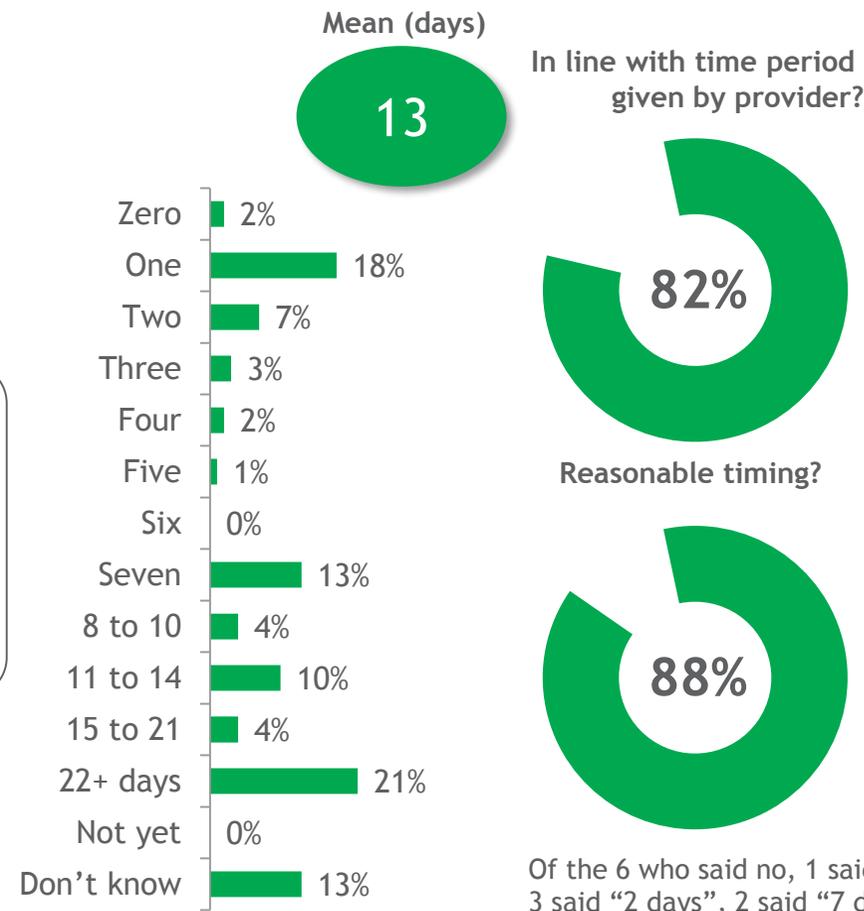
On average it takes 13 days to activate/upgrade a Landline (only). 82% said this was in line with provider information and 88% felt the time taken was reasonable



Scenario last time changed or upgraded service (Landline only)



Service activation (days)



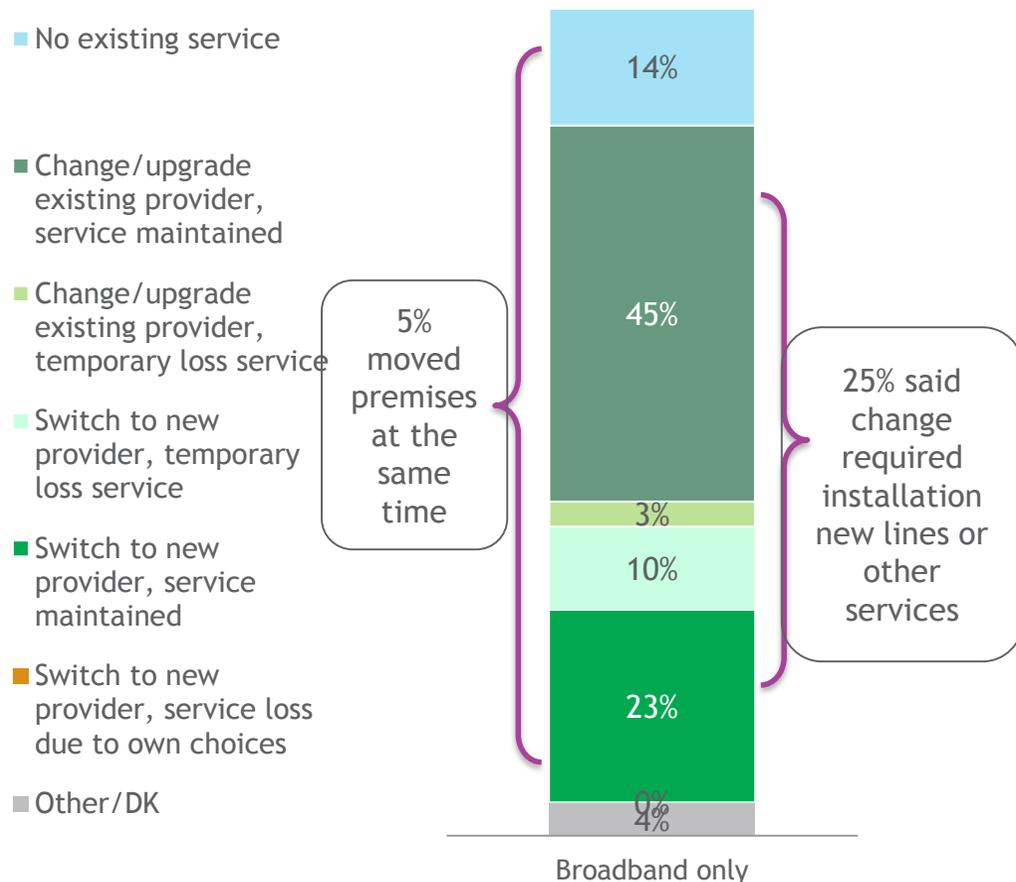
E2 Which of these scenarios applied to the last time you changed or upgraded your service? Base: All that have changed landline most recently in the last 5 years n=142

E3 Did you move premises at the same time? Base: All not 'other/dk' at E2 n=139. E4 Did the change or upgrade require the installation of new lines or other services? Base: All not 'no existing service', 'other/dk' or lost service due to own actions at E2 n=131. E5 Approximately how many calendar days after placing the order was the service activated or upgraded? Base: all that had a new landline service n=139 (not including other/dk or those without service due to own choices). E5b And was this in line with the time period you had been given by your provider? E6a Do you think the time it took was reasonable? Base: All where service activated n=138

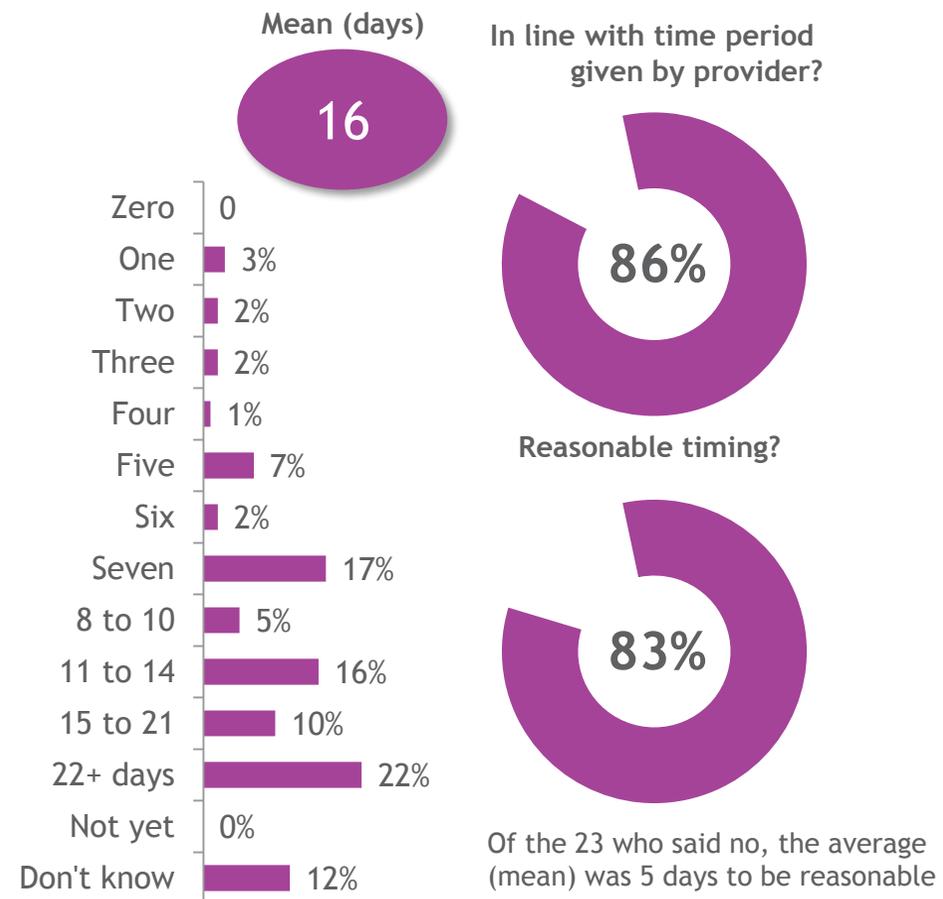
On average 16 days to service activation for Broadband only. 86% said this was in line with provider information and 83% felt the time taken was reasonable.



Scenario last time changed or upgraded service (Broadband only)



Service activation (days)

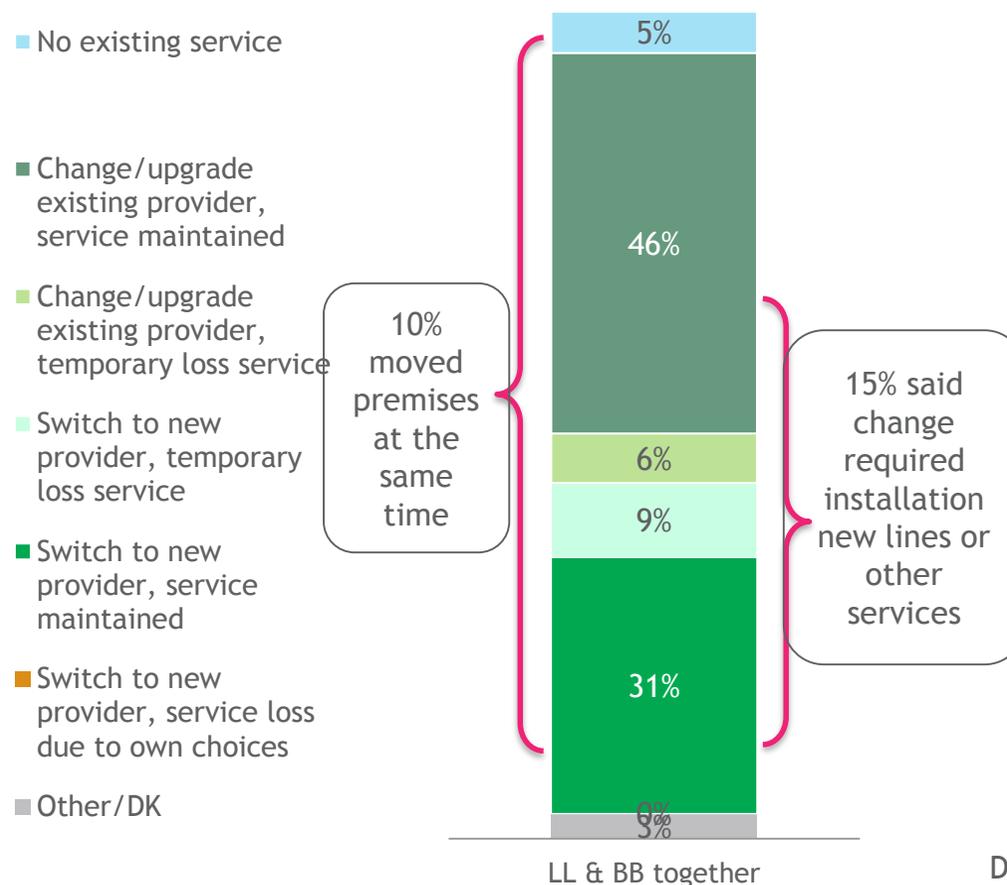


E2 Which of these scenarios applied to the last time you changed or upgraded your service? Base: All that have changed broadband most recently in the last 5 years n=180
 E3 Did you move premises at the same time? Base: All not 'other/dk' at E2 n=177. E4 Did the change or upgrade require the installation of new lines or other services? Base: All not 'no existing service' other/dk' or lost service due to own actions at E2 n=157. E5 Approximately how many calendar days after placing the order was the service activated or upgraded? Base: all that had a new broadband service n=176 (not including other/dk or those without service due to own choices). E5b And was this in line with the time period you had been given by your provider? E6a Do you think the time it took was reasonable? Base: All where service activated n=176

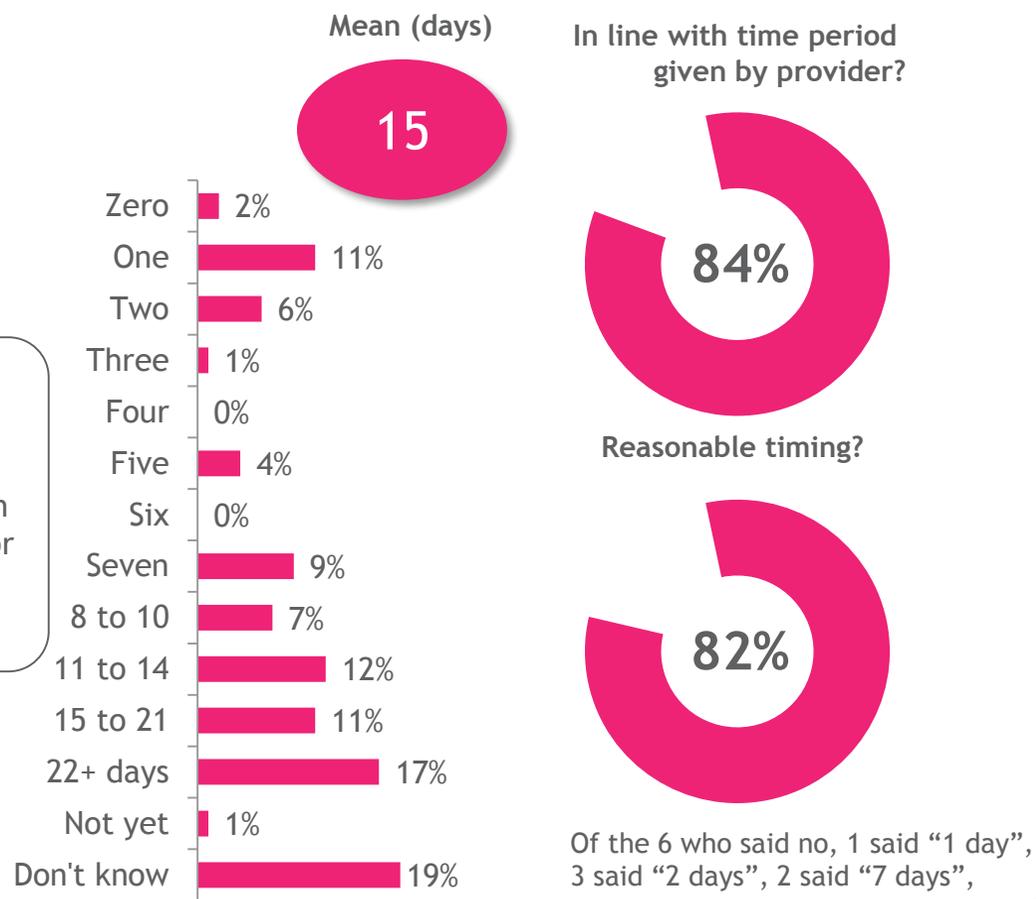
It takes 15 days for combined Landline & Broadband to be activated. 84% said this was in line with provider information and 82% felt the time taken was reasonable.



Scenario last time changed or upgraded service (LL&BB together)



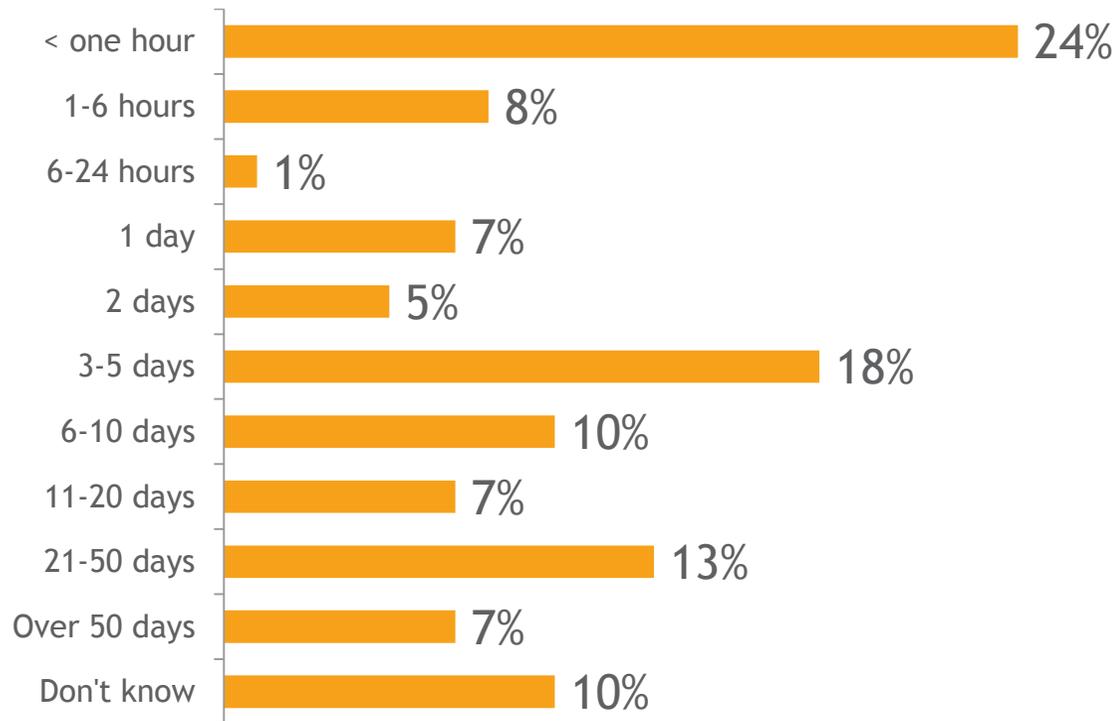
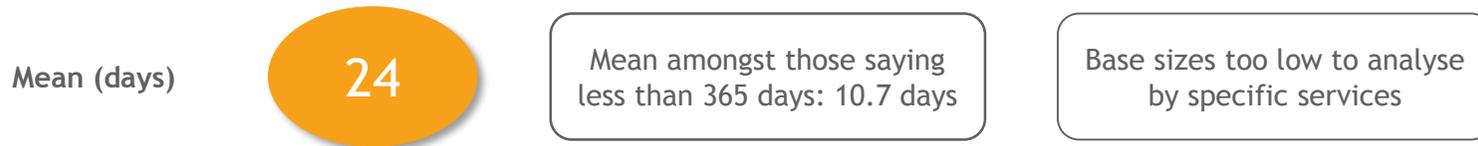
Service activation (days)



E2 Which of these scenarios applied to the last time you changed or upgraded your service? Base: All that have changed landline & broadband together in the last 5 years n=274. E3 Did you move premises at the same time? Base: All not 'other/dk' at E2 n=266. E4 Did the change or upgrade require an engineer to visit your home to install new lines or other equipment? Base: All not 'no existing service' other/dk' or lost service due to own actions at E2 n=246. E5 Approximately how many calendar days after placing the order was the service activated or upgraded? Base: all that had a new landline & broadband service n=264 (not including other/dk or those without service due to own choices). E5b And was this in line with the time period you had been given by your provider? E6a Do you think the time it took was reasonable? Base: All where service activated n=261

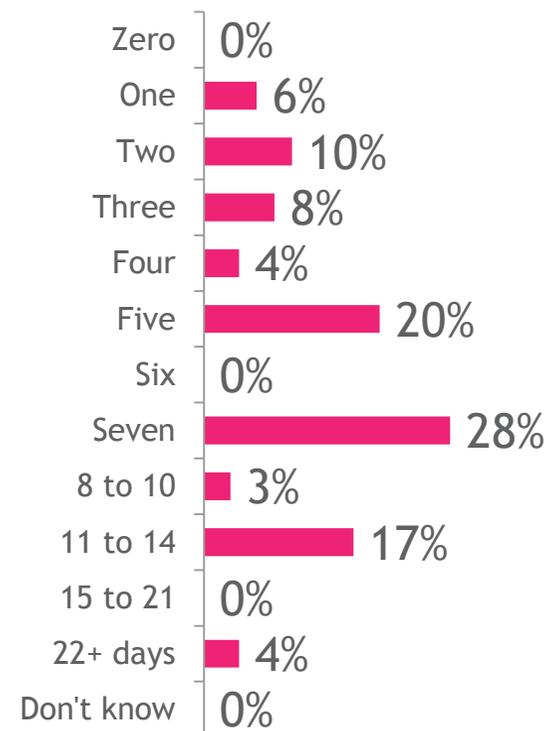
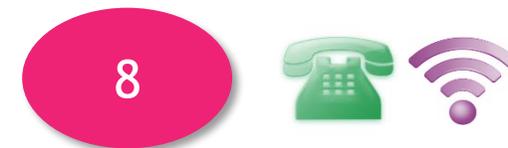
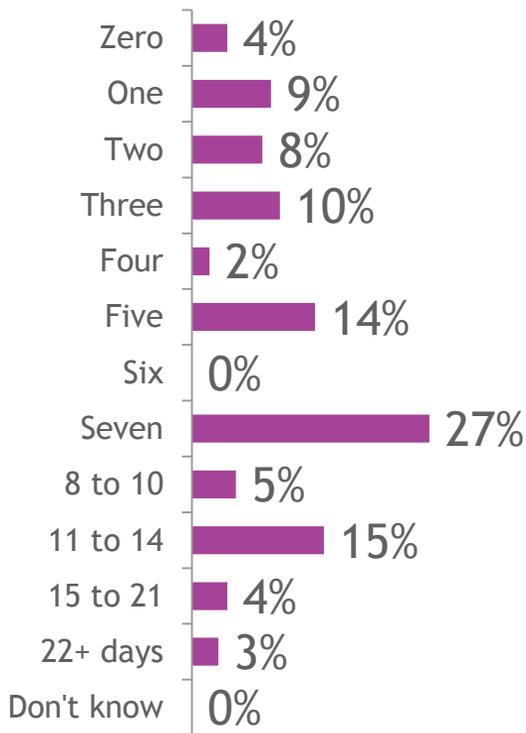
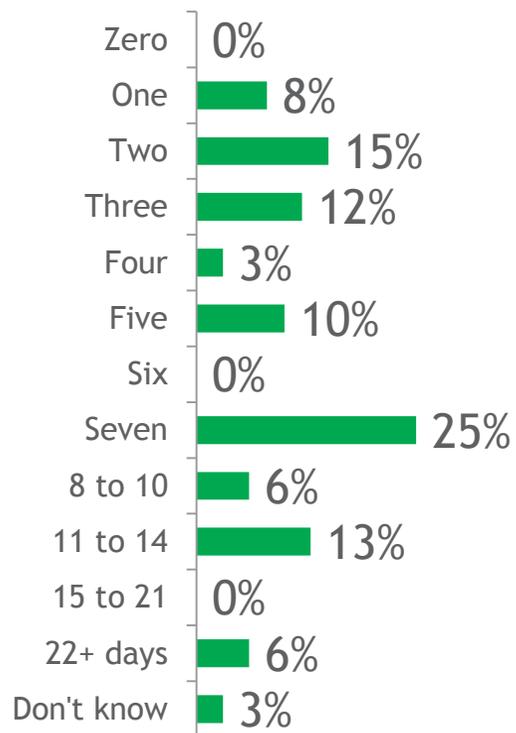
6% of our sample had experienced loss of service (during provisioning or upgrading for any of LL, BB or LL&BB). On average this loss was 24 days.

Experience of loss of service due to provisioning or upgrading (any service) - how long without the service?



Amongst switchers, just over a week on average would be considered a reasonable activation time if a business didn't have an existing service

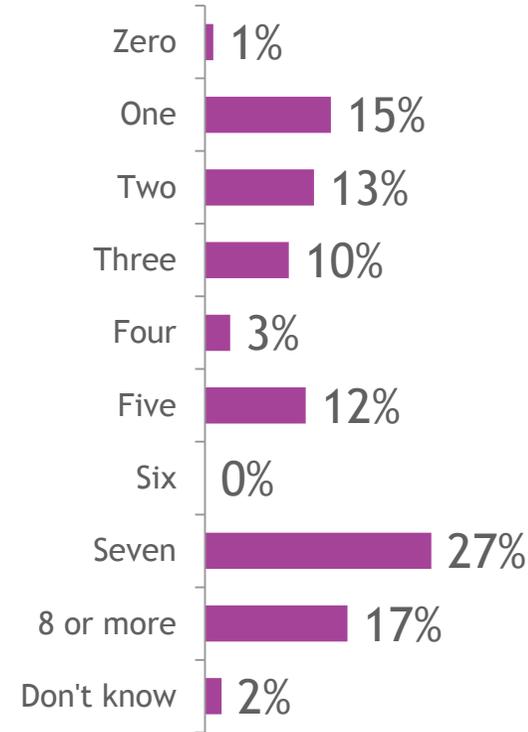
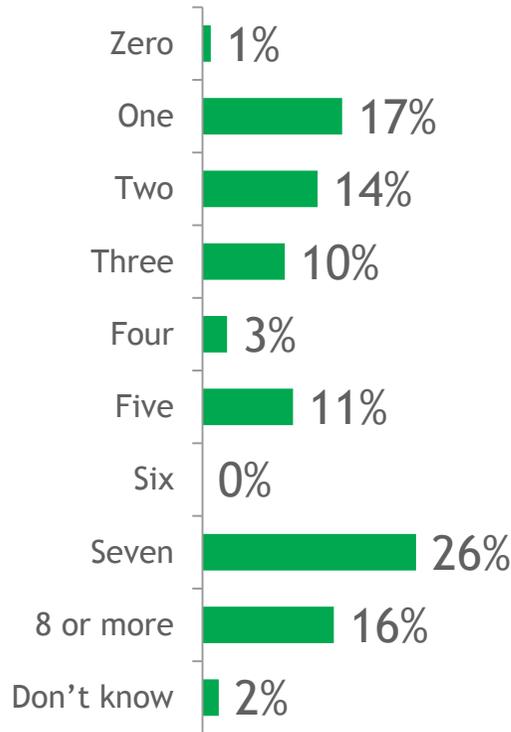
(Amongst switchers in past 5 years): If didn't have service at all, what would be reasonable activation time?



E7 I'd like you to imagine that you did not have (service) at all and had placed an order to have the service installed. How many days would you consider it reasonable to wait for it to be activated? Base: all who had switched landline/broadband/both most recently in past 5 years and had existing landline service n=134, broadband n=160, landline & broadband n=256

Amongst all with the service, on average 6 days would be acceptable for landline activation; slightly longer for broadband (7 days)

If didn't have service at all, what would be reasonable activation time?

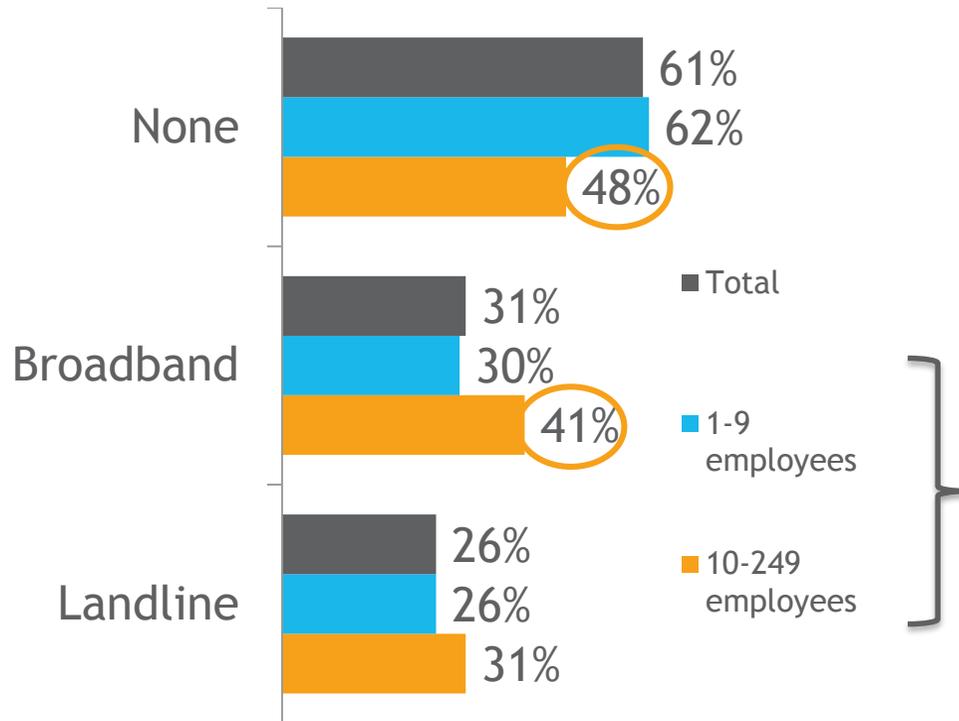


Section 4

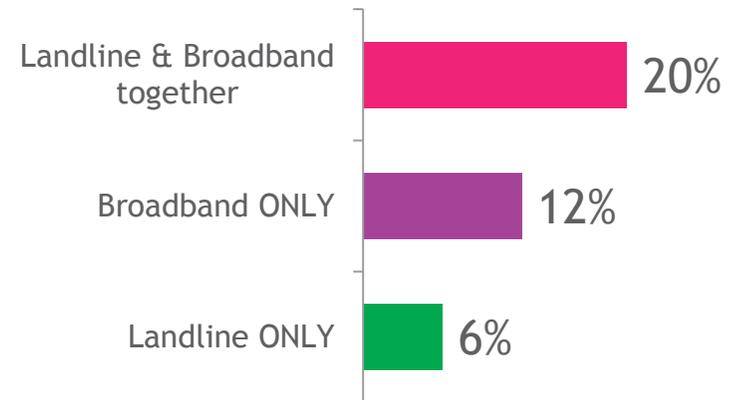
Experience of and impact of loss of service

Almost two-fifths (39%) have ever experienced a complete loss of service for more than one hour. Larger SMEs are more likely to have experienced this.

Experience of loss of service



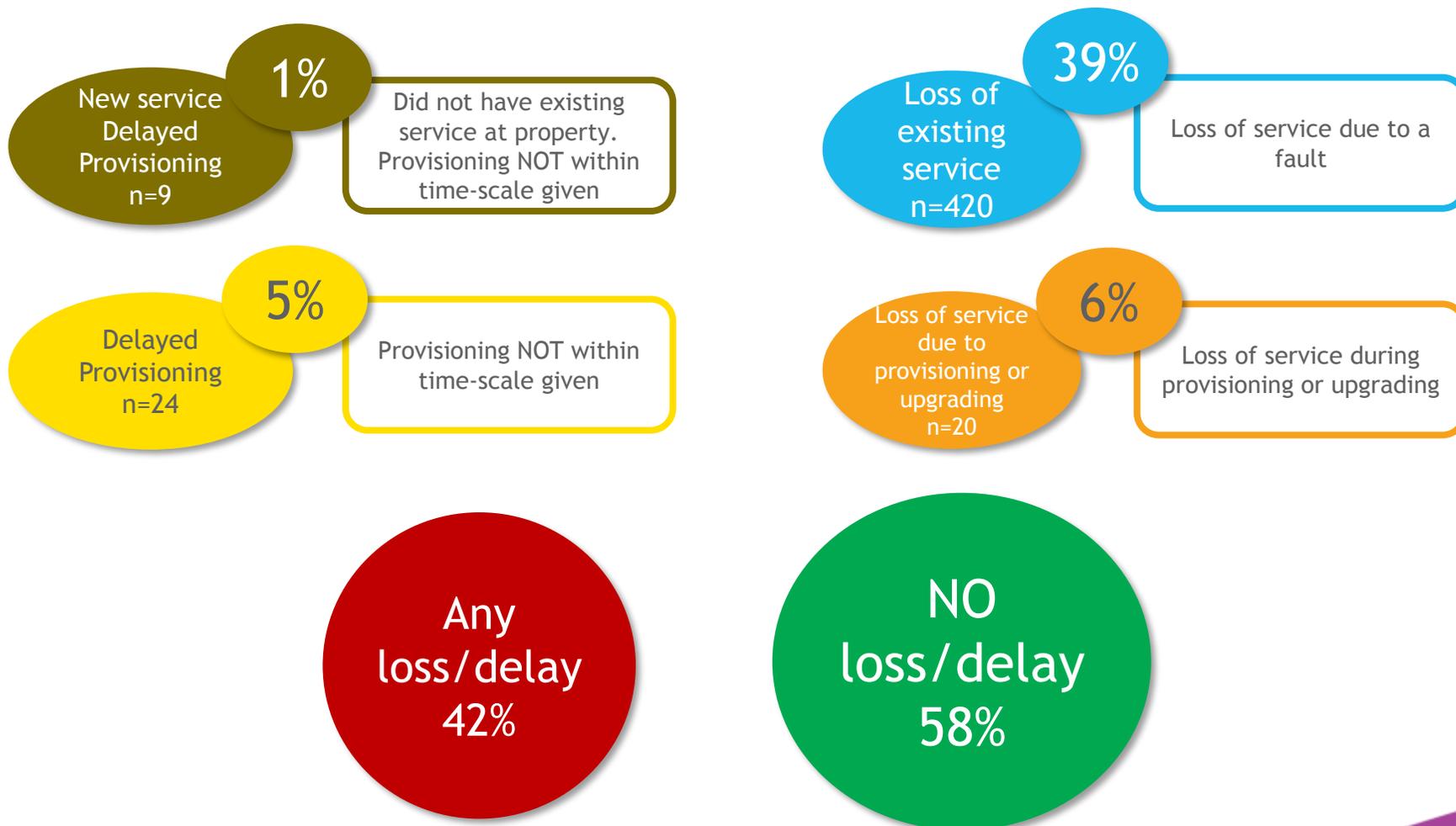
Most recent loss of service



E9a Over the last 2 years, have you experienced a complete loss of service for more than one hour for the following services taken by your business? By loss of service, we mean complete inability to make or receive voice calls or to access the internet. Please don't include instances when your connection speed was slower than usual, but do include those that occurred as a result of a fault on your existing service. E9b Did you lose your landline and your broadband service at the same time? E9c Which service did you lose most recently? E9d When you lost your landline service did you also lose your broadband at the same time? E9e When you lost your broadband service did you also lose your landline at the same time? Base: Total Sample with landline or broadband n=991

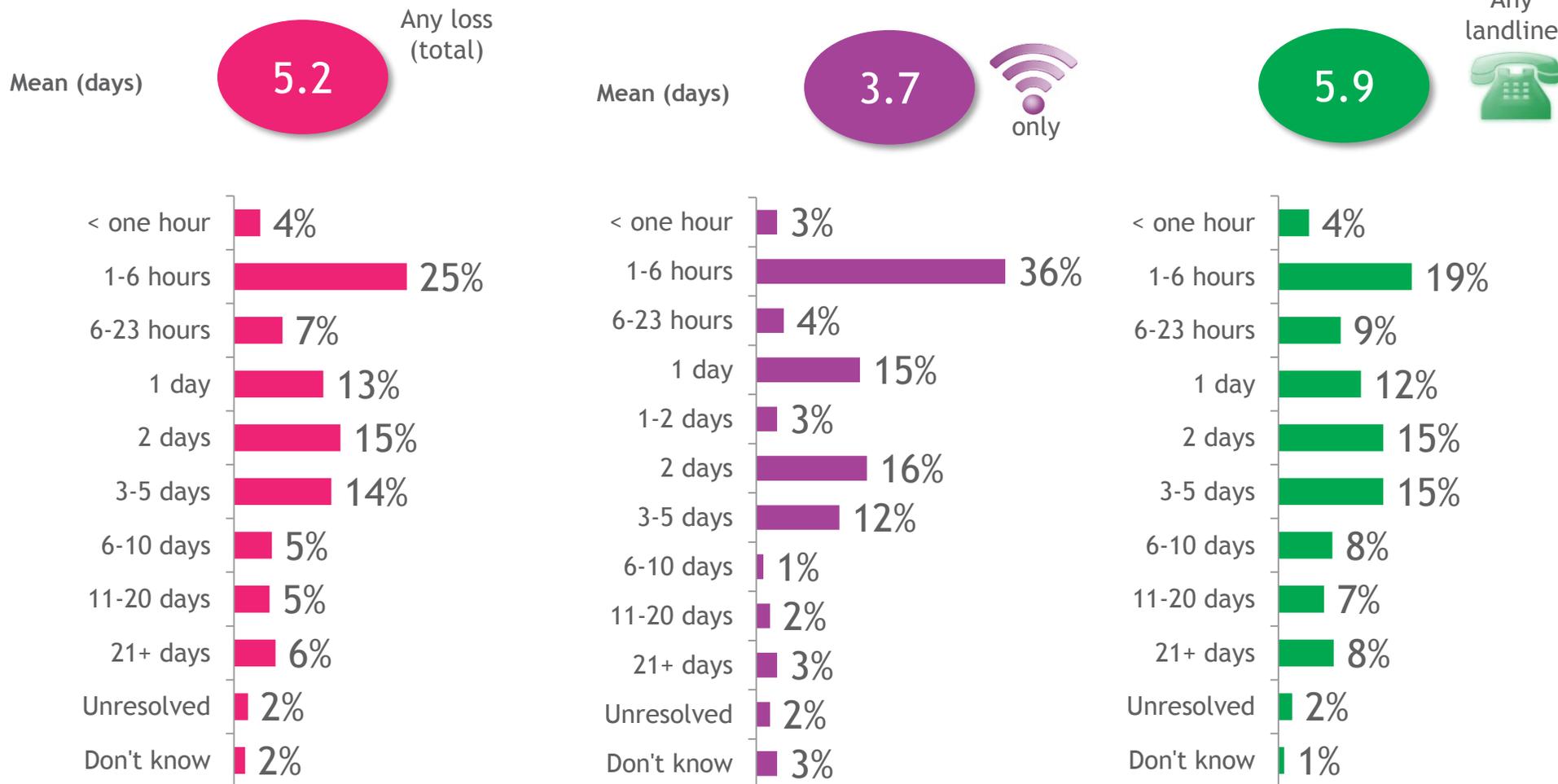
Overall, 42% of SMEs had experienced any loss or delay with regard to telecommunications services. The vast majority of these were related to loss of existing services due to a fault, rather than issues with provisioning/upgrading

% incidence in each group within the SME population



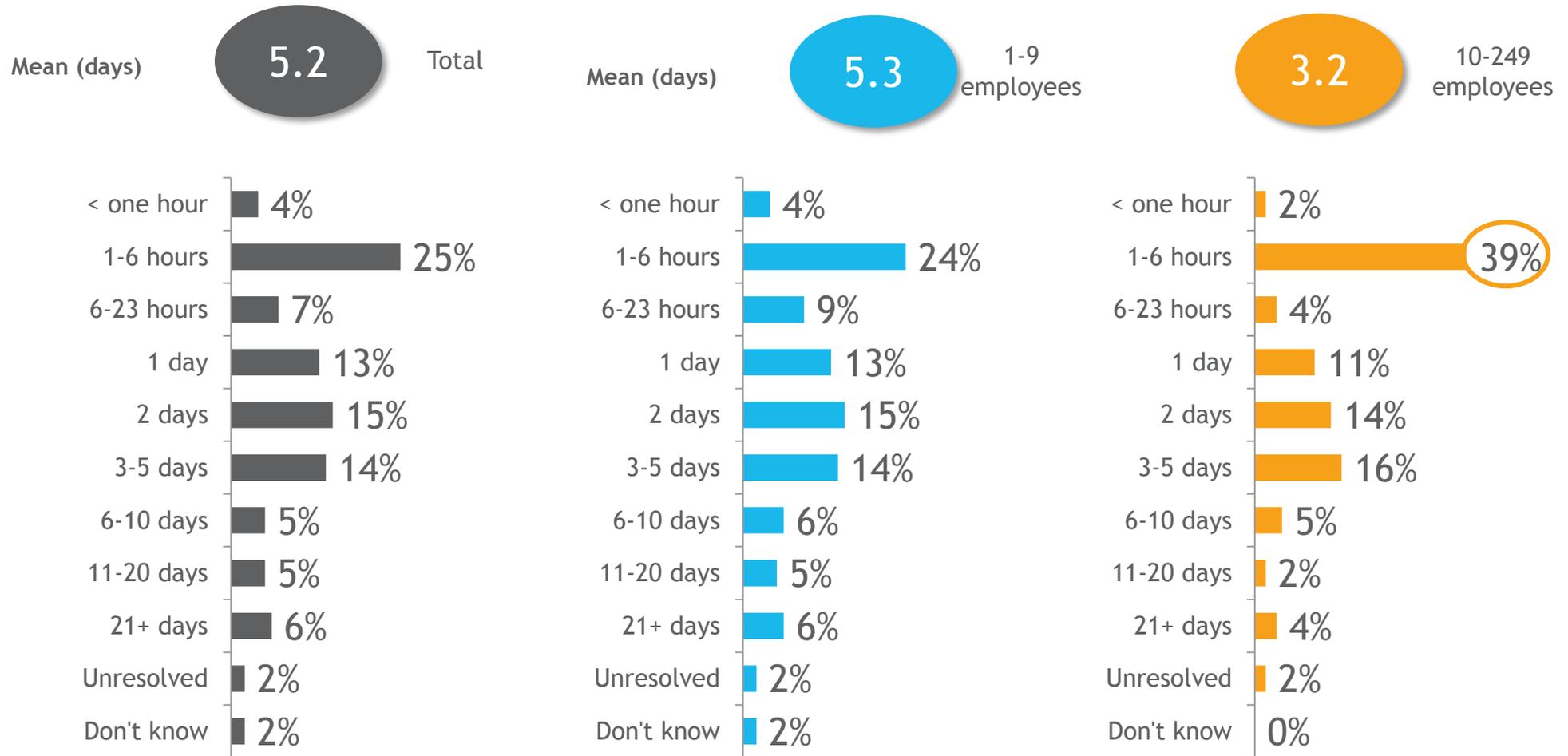
Loss of service clearly very variable, but on average lasted around 4 days for broadband (only), rising to almost a week for any landline

How long experienced loss of service for?



Larger SMEs likely to have experienced their loss of service over a shorter time frame

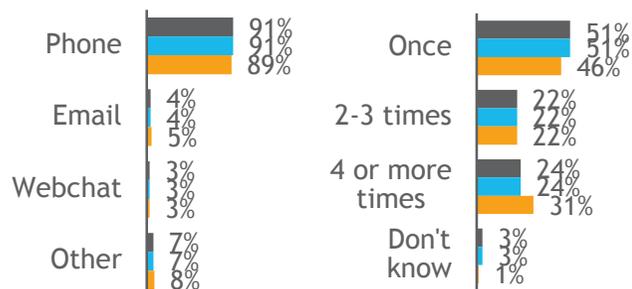
How long experienced loss of service for (any service)?



On average, almost 9 in 10 reported to provider (96% of larger SMEs). Of these, almost three-quarters made contact within the hour - almost all via telephone, half just once. A quarter had a recurring fault.

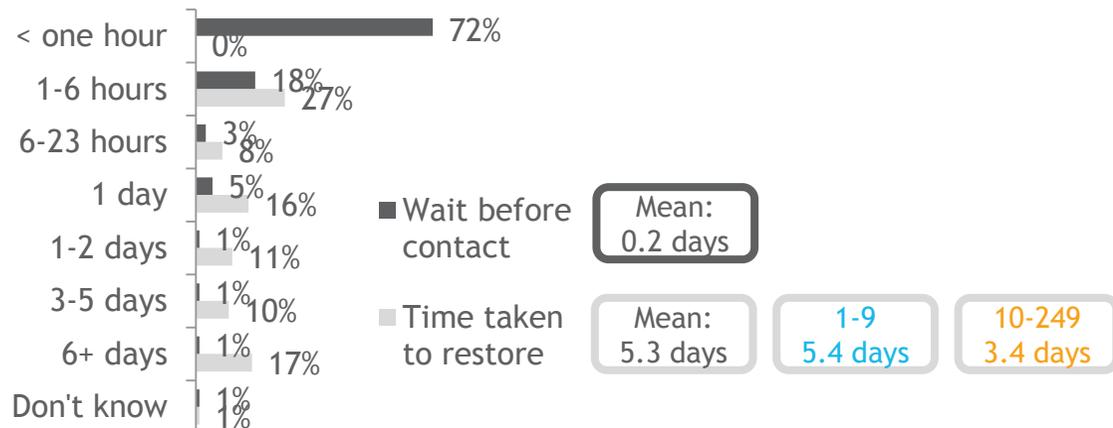
Experience of loss of service (any service)

Reported to provider?

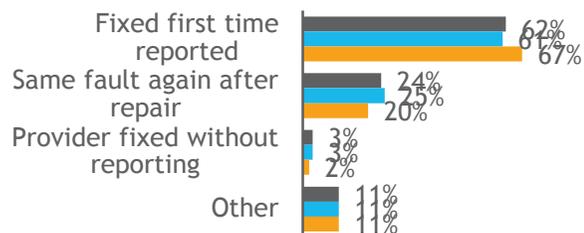


How long wait after loss/expectation before contacting provider?

How long did it take for service to be restored after first notification?



What happened when reported?



Why NOT reported?

NO
11%

Of the 32 who did not report, 8 looked at providers website for updates, 5 said it was fixed before they had time to report, 6 didn't think it would last very long

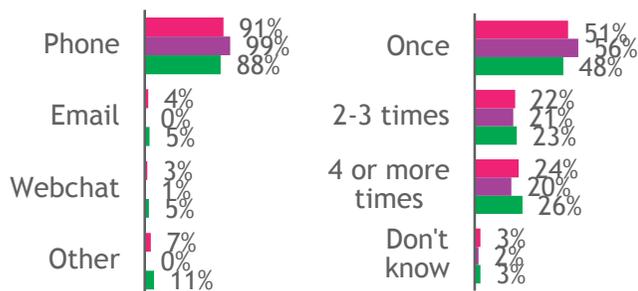
F2a Did you report your Landline/Broadband/Landline & Broadband loss of service?

Base: ANY SERVICE: loss of service n=420, 1-9 employees n=251, 10-249 employees n=169. F2c How long after you (lost service/expected service to be installed/upgraded) did you contact the provider to let them know? F2d How did you contact your provider? F2e How many times did you contact your provider? F5 How long did it take for your service to be restored after you first notified your provider of the issue? F4 Which of the following best matches what happened when you reported the loss of service? BASE: all who reported n=388, 1-9 employees n=226, 10-249 n=162

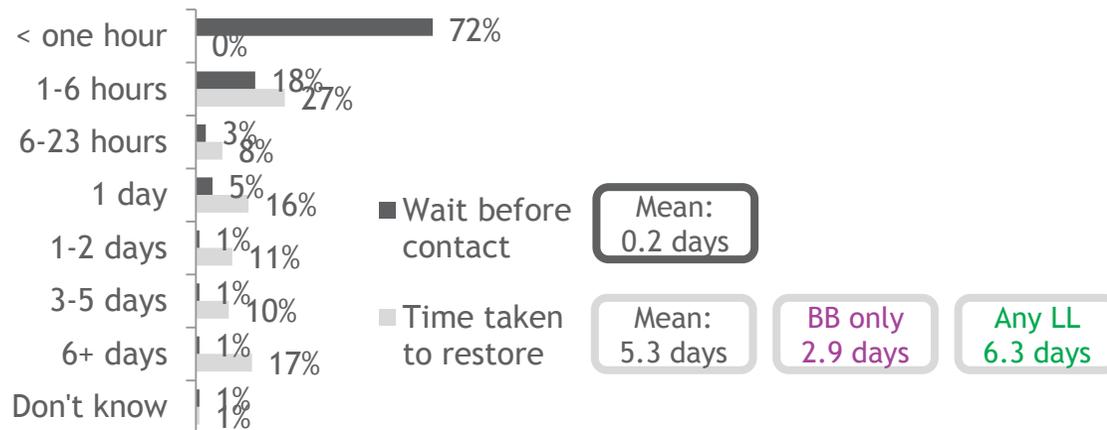
Businesses experiencing any LL loss were more likely to report it to their provider. On average, broadband (only) faults were restored more quickly (within c3 days)

Experience of loss of service (any service)

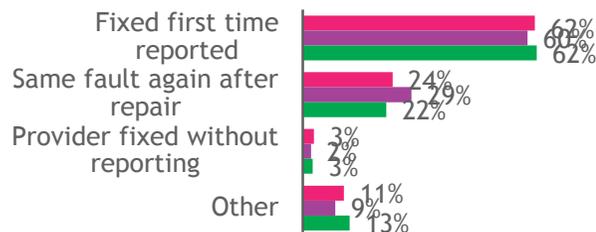
Reported to provider?



How long wait after loss/expectation before contacting provider?
How long did it take for service to be restored after first notification?



What happened when reported?



Why NOT reported?

NO 11%

Of the 32 who did not report, 8 looked at providers website for updates, 5 said it was fixed before they had time to report, 6 didn't think it would last very long

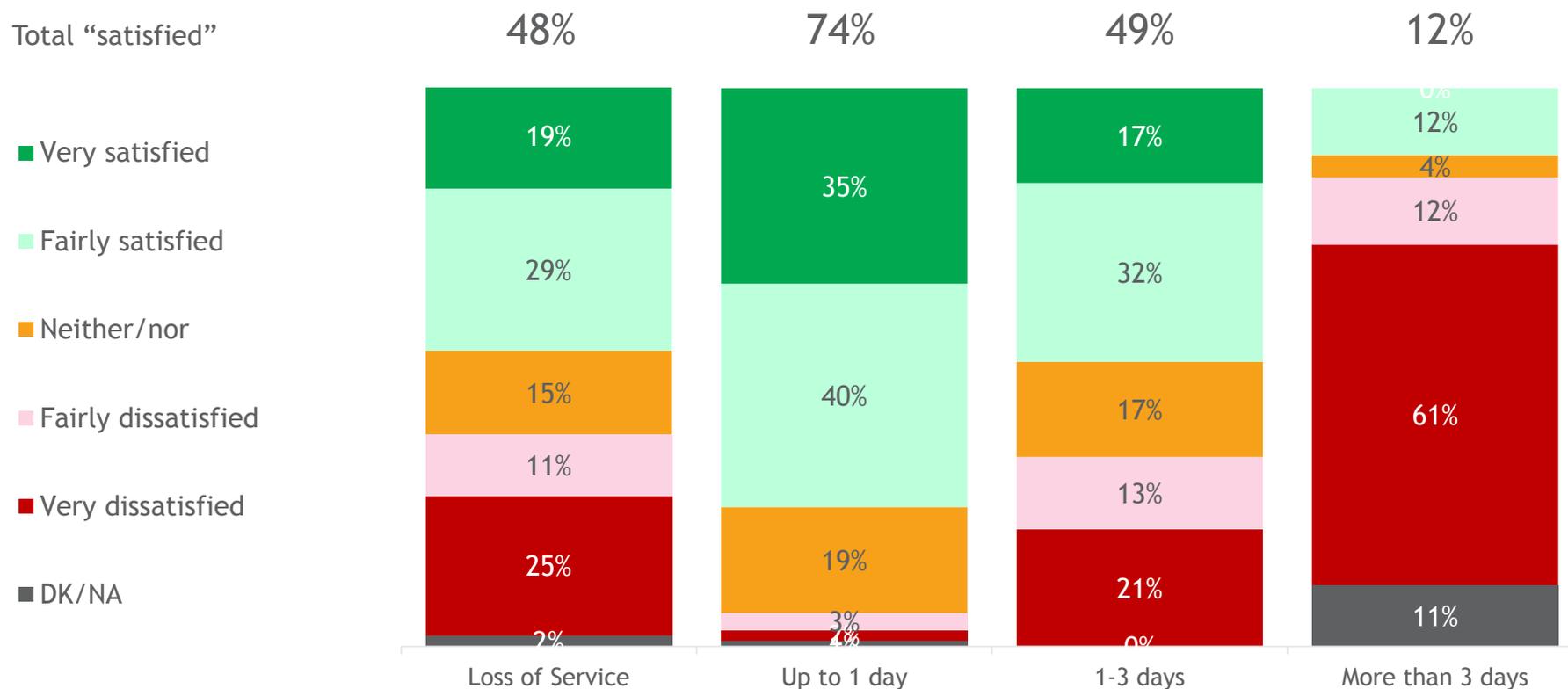
F2a Did you report your Landline/Broadband/Landline & Broadband loss of service?

Base: ANY SERVICE: loss of service n=420, broadband only n=161, any landline n=169. F2c How long after you (lost service/expected service to be installed/upgraded) did you contact the provider to let them know? F2d How did you contact your provider? F2e How many times did you contact your provider? F5 How long did it take for your service to be restored after you first notified your provider of the issue? F4 Which of the following best matches what happened when you reported the loss of service?

BASE: all who reported n=388, broadband only n=143, any landline n=245

SMEs become increasingly dissatisfied with their provider’s ability to resolve the issue as the length of time to resolve increases

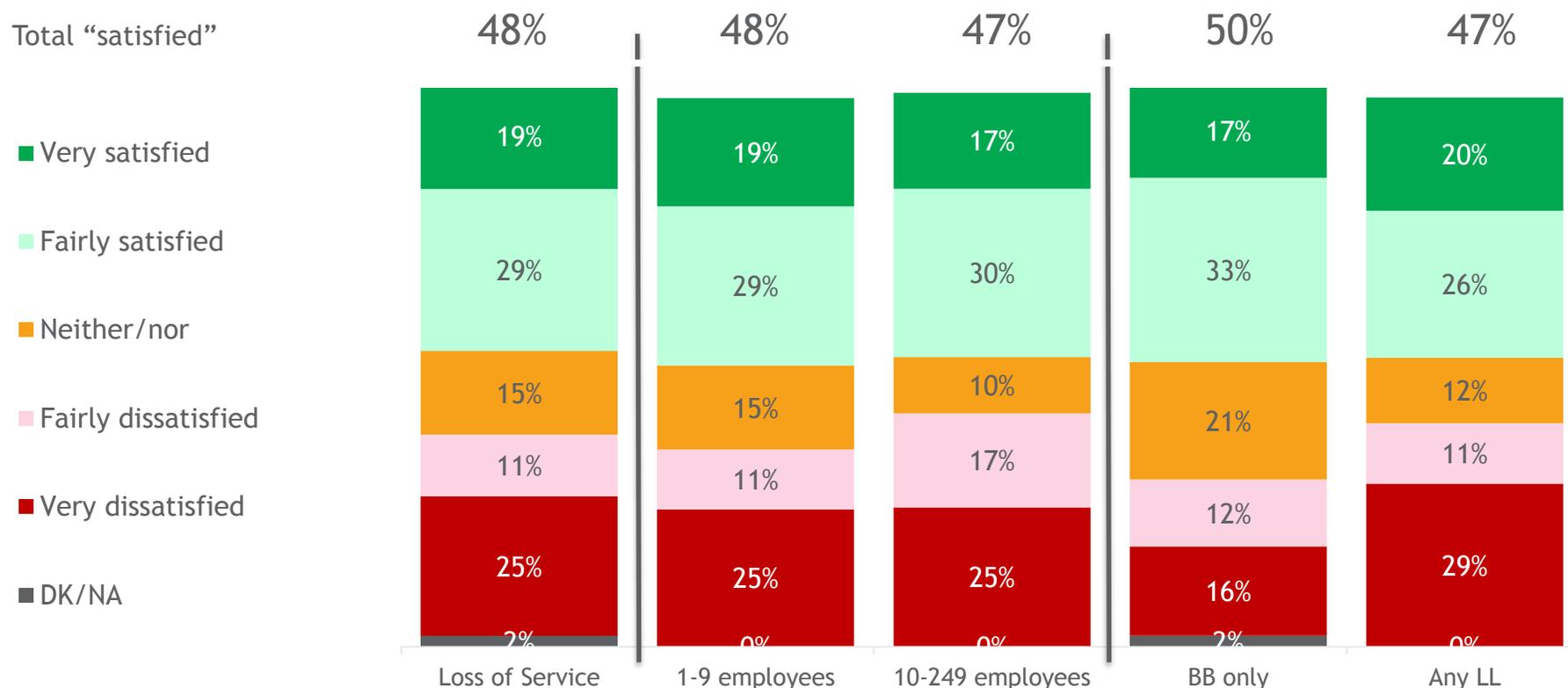
Satisfaction with provider ability to resolve loss of service x by how long did it take for your service to be restored after first notifying the provider



F6 Overall, how satisfied or dissatisfied were you with the length of time it took your provider to resolve your loss of service for your (service), using the following scale?
 Base: All with a complete loss of service. Total n=420, F5 How long did it take for your service to be restored after you first notified your provider of the issue? BASE: all who reported n=388, all where service restored within 1 day n=164, 1-3 days n=131, more than 3 days n=77*
 *CAUTION LOW BASE

Overall around half are satisfied with the length of time their provider took to resolve their loss of service (slightly lower satisfaction if business had lost their landline - either on it's own or with broadband)

Satisfaction with provider ability to resolve loss of service



F6 Overall, how satisfied or dissatisfied were you with the length of time it took your provider to resolve your loss of service for your (service), using the following scale?
 Base: All with a complete loss of service. Total n=420, 1-9 n=251, 10-249 n=169, broadband only n=161, any landline n=259

Two-thirds found an alternative workaround to the loss of service. Half stated it had a negative impact on their work-related activities, whilst more than two-fifths felt it caused stress

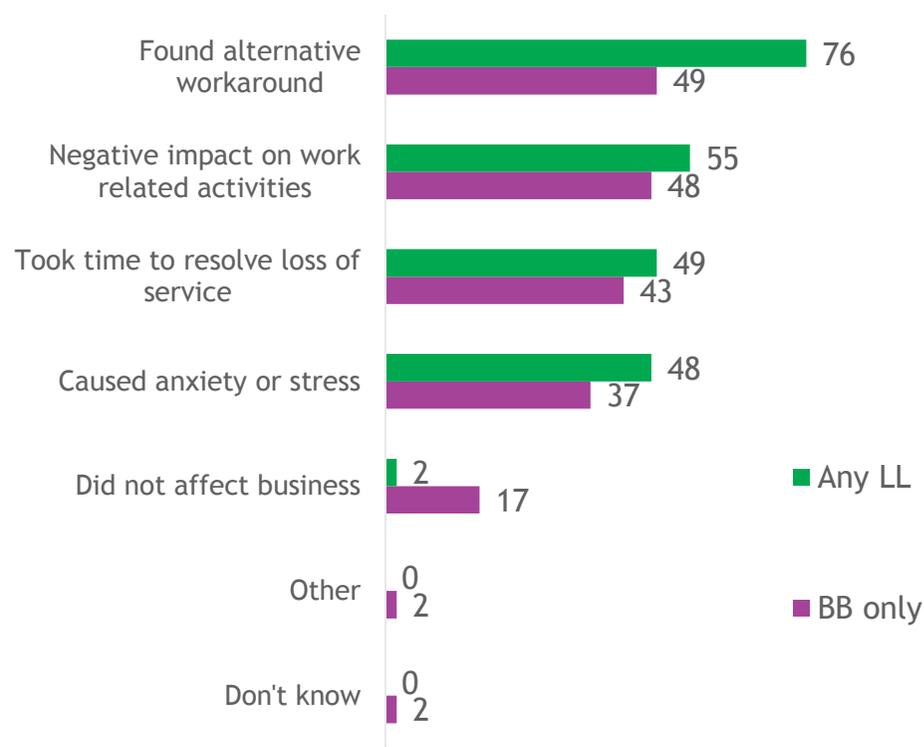
Larger SMEs / those losing any landline were more likely to be negatively impacted by their service loss

Experience of loss of service

Business impacts (by business size)



Business impacts (by service lost)



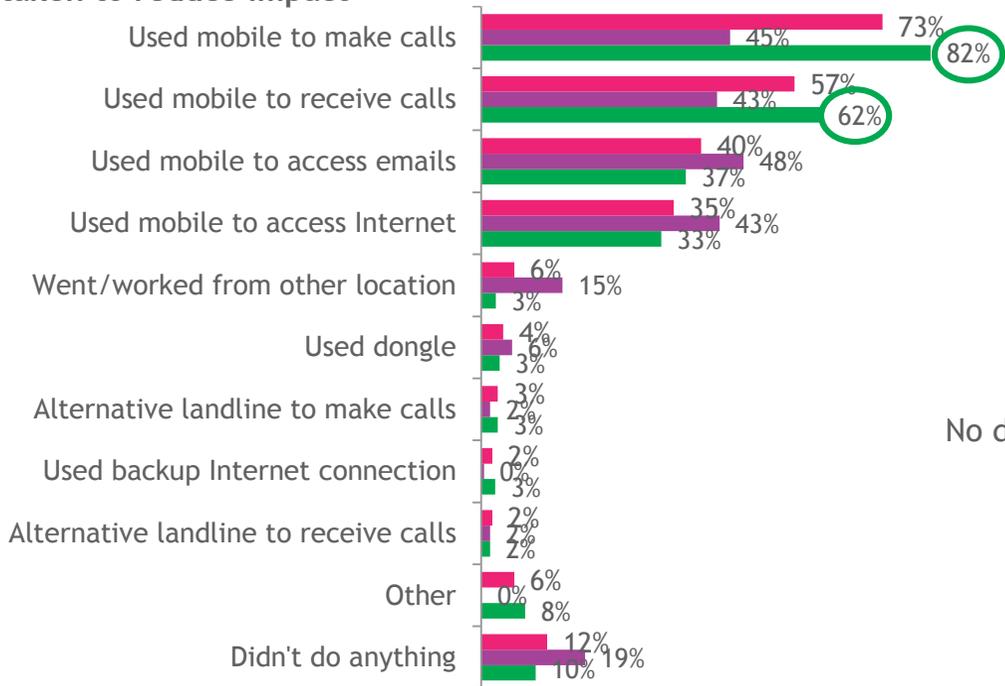
Amongst those who found an alternative workaround, mobiles were most likely to be involved. More than half claim no direct financial cost resulting from their alternative workaround actions. BB (only) workarounds typically cost less.

Experience of a complete loss of service (any service)

Found an alternative workaround

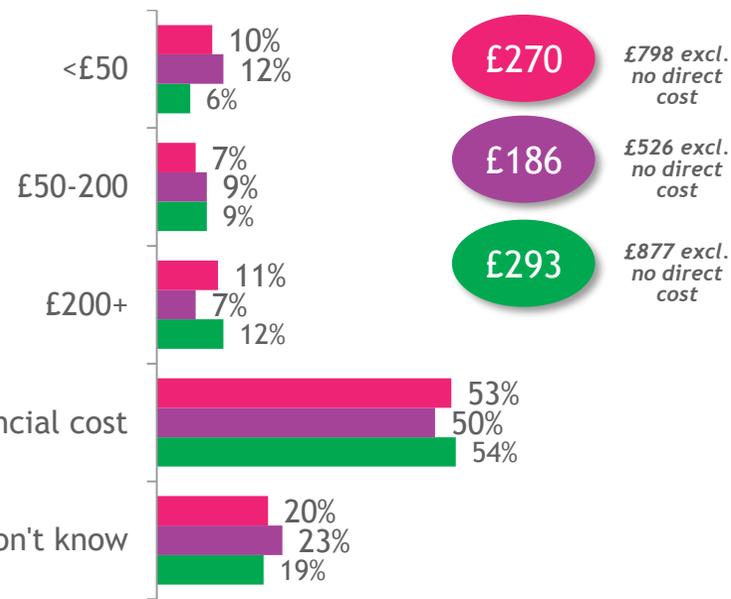


Actions taken to reduce impact



Direct financial costs of these actions

Mean



F7a Which, if any, of the following would you say applied to your most recent loss of service? Base: All that experienced a loss of service. Total n=420.

F7b> What, if anything, did you do to reduce the impact of this loss of service? Base: all who found an alternative workaround n=252, broadband only n=85*, any landline n=195. F7c> Thinking about the factors you mentioned, what were the direct financial costs to you (e.g. cost of mobile calls) and the people in your business that were caused by your most recent loss of service? Base: all who did something n=255, broadband only n=73 any landline n=182. *CAUTION LOW BASE

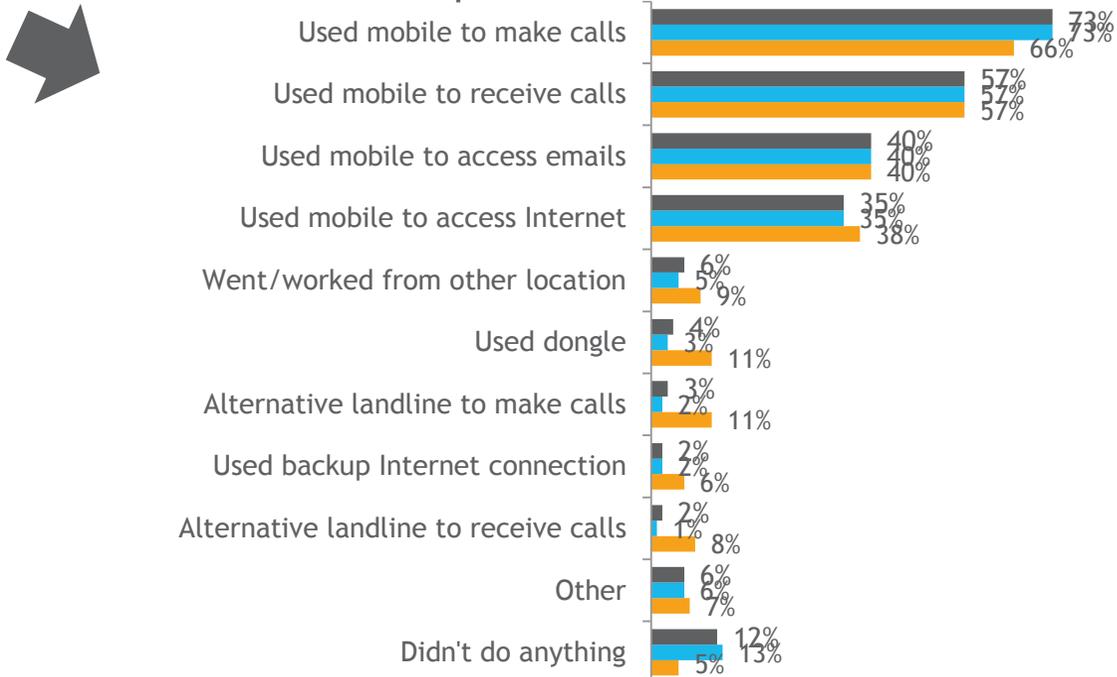
Again, mobiles were most likely to be involved in the workaround. The workaround was more costly for larger SMEs at an average of c£735

Experience of a complete loss of service (any service)

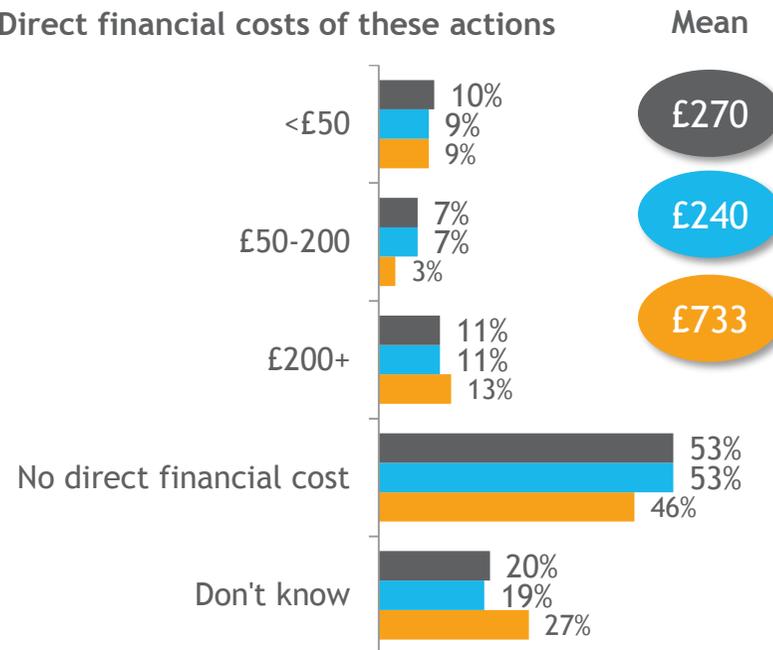
Found an alternative workaround



Actions taken to reduce impact



Direct financial costs of these actions



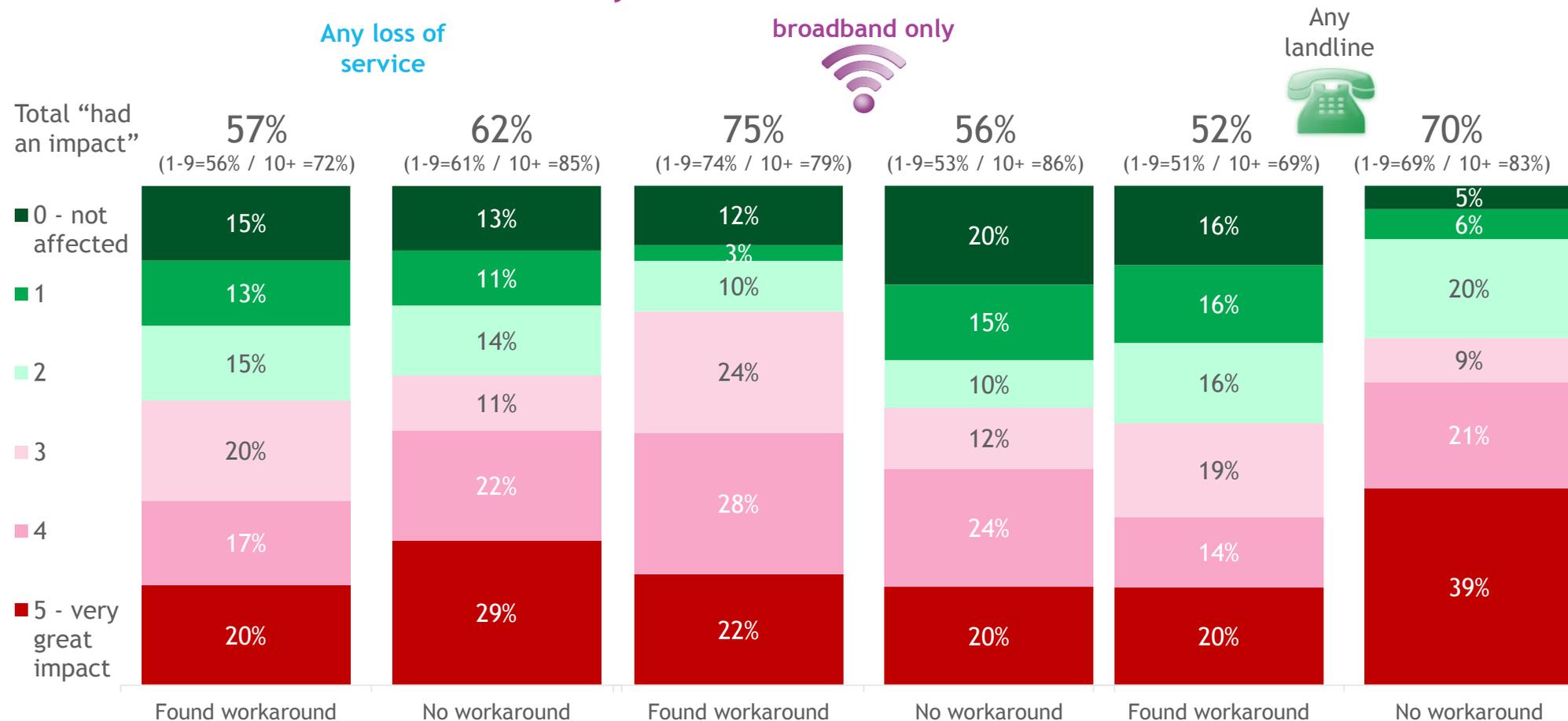
F7a Which, if any, of the following would you say applied to your most recent loss of service? Base: All that experienced a loss of service. Total n=420.

F7b> What, if anything, did you do to reduce the impact of this loss of service? Base: all who found an alternative workaround n=280, 1-9 employees n=168, 10-249 employees n=112. F7c> Thinking about the factors you mentioned, what were the direct financial costs to you (e.g. cost of mobile calls) and the people in your business

that were caused by your most recent loss of service? Base: all who did something n=255, 1-9 employees n=148, 10-249 employees n=107

Two thirds of those that found a workaround claim that it had a negative impact on their normal activities (the workaround negatively affected three quarters of larger SMEs).

Extent to which normal activities affected by workaround/loss of service



F7d To what extent were your normal activities affected by this workaround? Base: all that found alternative workaround and did something n=255, broadband only n=73*, any landline n=182. F10 To what extent were your normal activities affected by this loss of service? Please use a scale where 0 indicates 'not affected' (i.e. was able to carry out same activity as would have done in event of no loss of service) and 5 indicates a very large impact (i.e. it was not possible to do any of the things you usually do using the service you lost). Base: all that did NOT find an alternative workaround n=140, broadband only n=76*, any landline n=64* *CAUTION LOW BASE

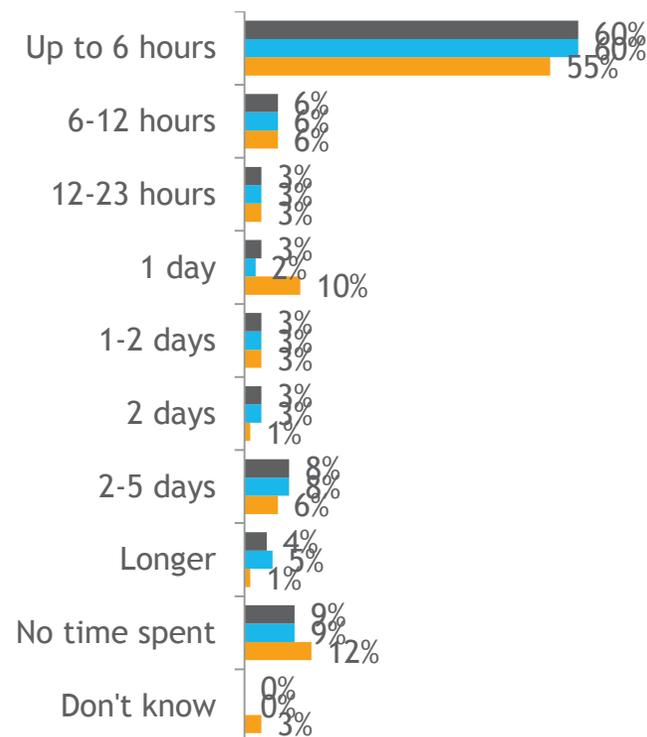
The majority (95%) of those who took time to try and resolve their loss of service, called their provider. About half spent time trying to fix it themselves. Half spent less than 6 hours trying to fix their fault.

Experience of a complete loss of service (any service)

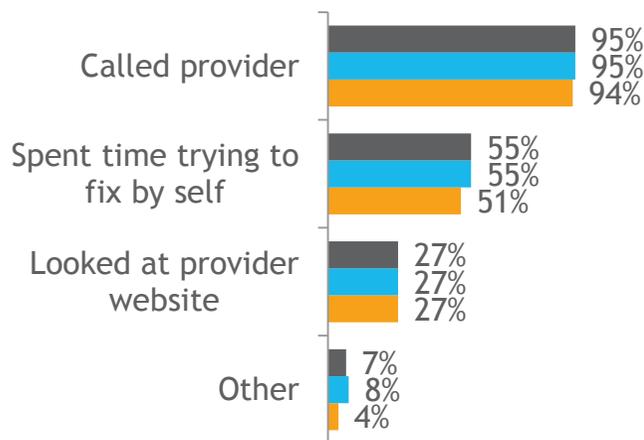
Took time to try to resolve loss of service



Time taken trying to get services back



Actions taken to try to resolve



F8a What did you do to try to resolve your loss of service? F8b How much time did you and other people in your business spend trying to get your service(s) fixed? Please think about all the things that you and others in your business spent time on to resolve the loss (e.g. time spent on the phone with your provider or time spent trying to fix the problem yourselves). It should not include the time spent waiting for an engineer visit(s).

Base: all that took time to resolve n=235, 1-9 employees n=134, 10-249 employees n=101, total loss n=235, broadband only n=87*, any landline n=148

*CAUTION LOW BASE

The majority (95%) of those who took time to try and resolve their loss of service, called their provider. About half spent time trying to fix it themselves. Half spent less than 6 hours trying to fix their fault.

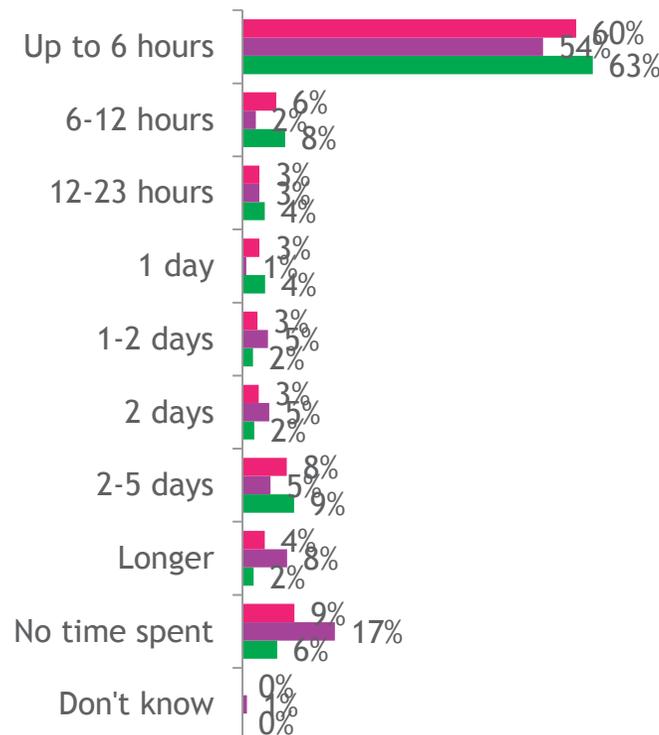
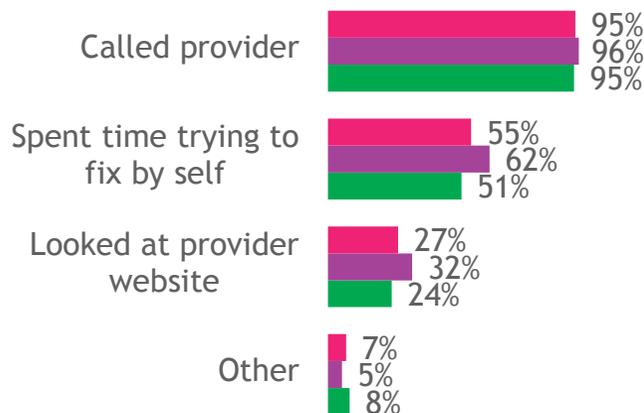
Experience of a complete loss of service (any service)

Took time to try to resolve loss of service

Time taken trying to get services back



Actions taken to try to resolve



F8a What did you do to try to resolve your loss of service? F8b How much time did you and other people in your business spend trying to get your service(s) fixed? Please think about all the things that you and others in your business spent time on to resolve the loss (e.g. time spent on the phone with your provider or time spent trying to fix the problem yourselves). It should not include the time spent waiting for an engineer visit(s).

Base: all that took time to resolve n=235, 1-9 employees n=134, 10-249 employees n=101, total loss n=235, broadband only n=87*, any landline n=148

Key negative impacts of loss were time wasted (especially micros) - and work disrupted and stress (especially larger SMEs and BB (only) loss of service).
 6 in 10 claimed an impact on supplier communications and more than half felt an impact on sales or revenue

Experience of a complete loss of service (any service)

Loss of service had a negative impact

Total
53%

1-9
52%

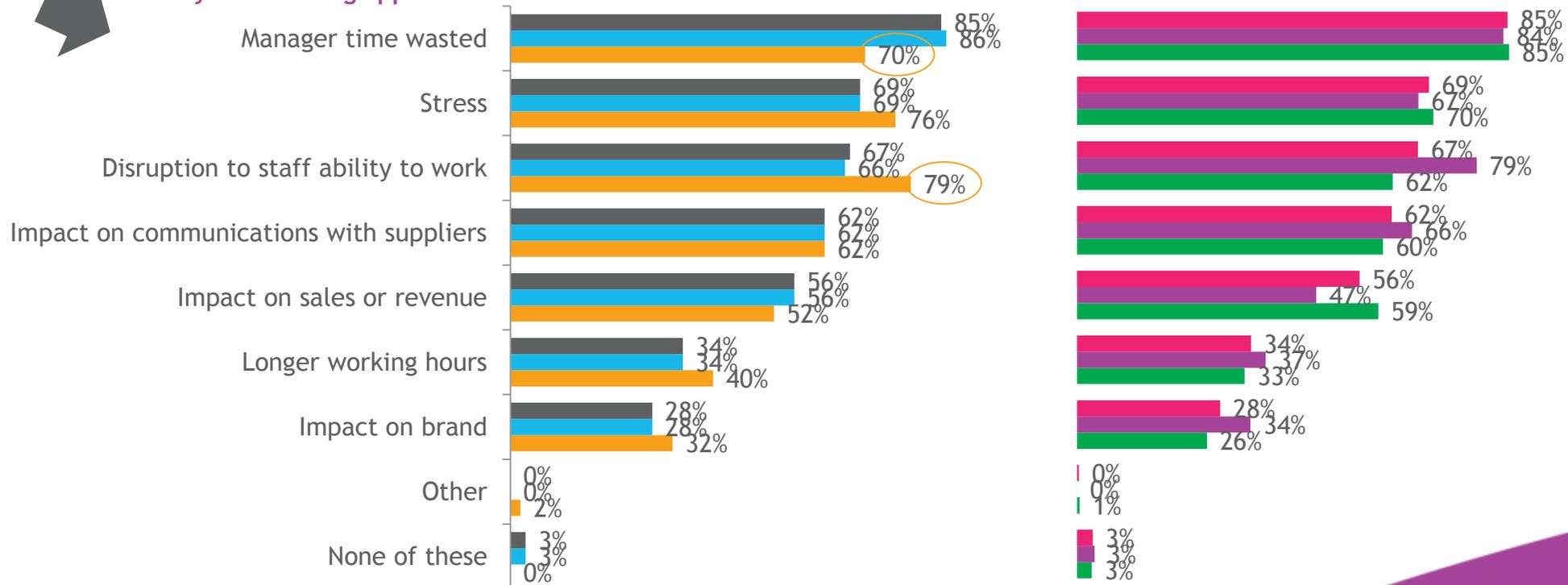
10-249
66%

Total loss
53%

BB only
48%

Any LL
55%

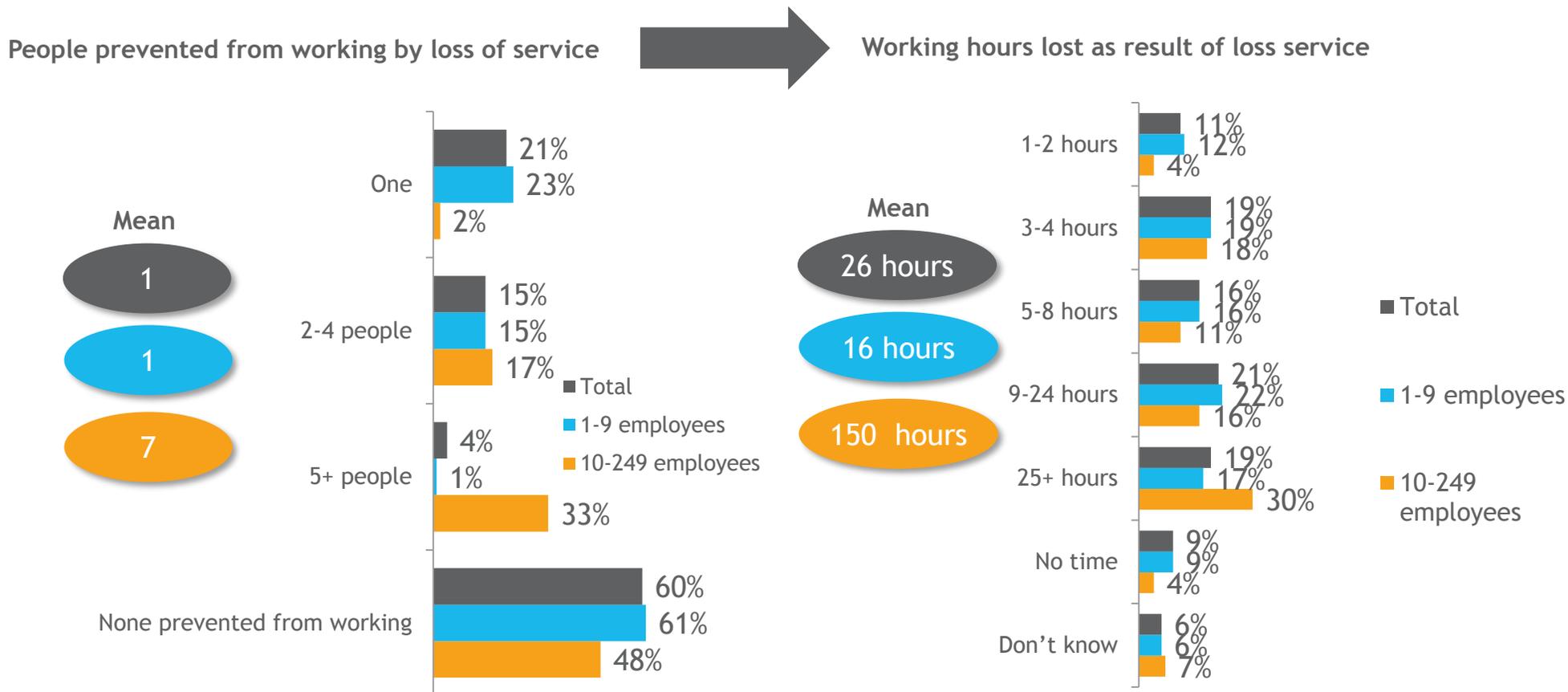
Any of following applied?



F9 Did any of the following apply to your most recent loss of service? Base: all that had a negative impact n=264, 1-9 employees n=142, 10-249 employees n=121
 Any that had a negative impact through total loss of service n=264, broadband only n=108, any landline n=156

Larger SMEs less likely to say no-one was prevented from working

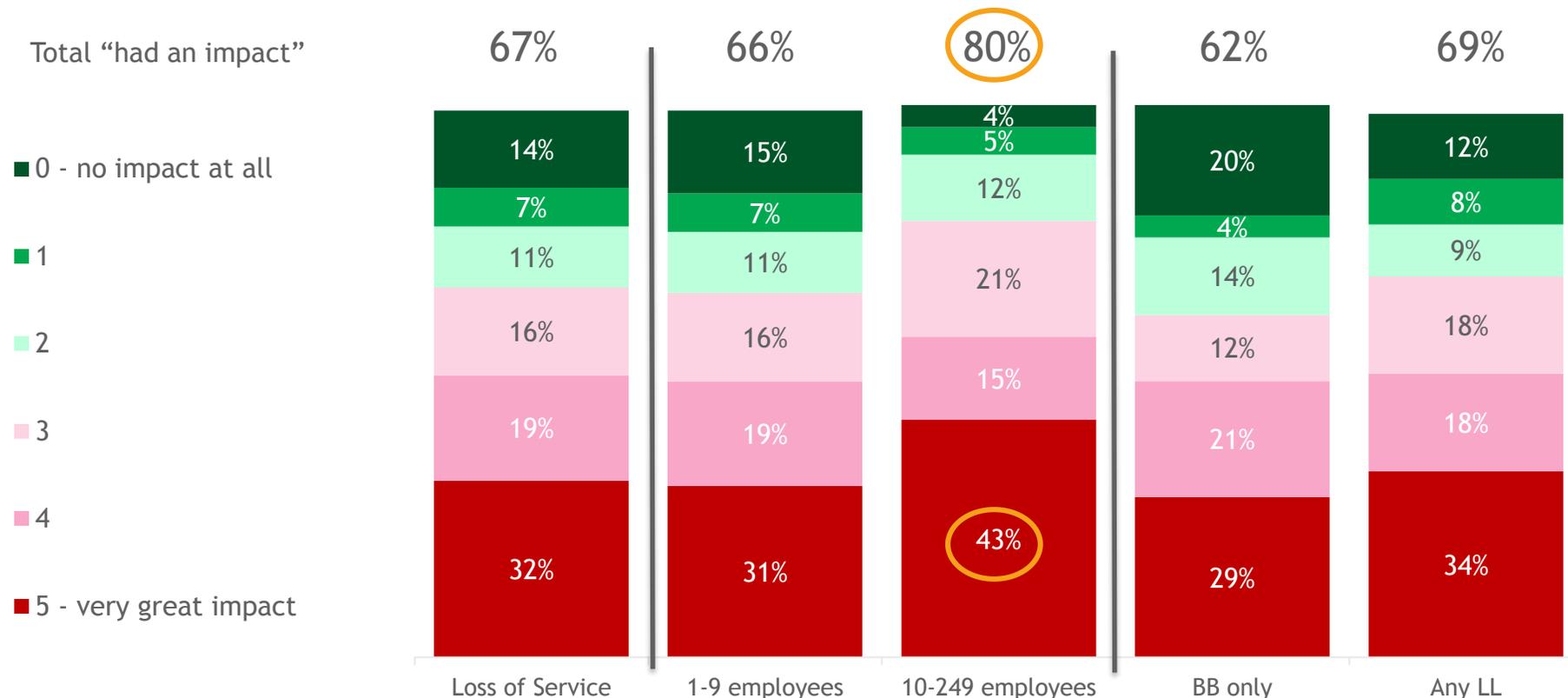
Experience of loss of service



F11 As a result of your loss of [landline telephone / fixed broadband] how many people, if any, were prevented from working? Base: all loss of service n=420, 1-9 employees n=251, 10-249 employees n=169 F12 Approximately how many working hours do you think were lost as a result of your loss of [landline telephone / fixed broadband] / delay in service activation or upgrade? Please don't include the time taken to fix the issue. Base: all where people prevented from working n=199 1-9 employees n=103, 10-249 employees n=96* *CAUTION LOW BASE

Overall, two thirds feel the loss of service had an impact on the communication needs of their business (a very great impact in a third of cases). This is driven by loss of any landline. Loss of broadband alone is less impactful. Larger SMEs felt the impact more than smaller ones

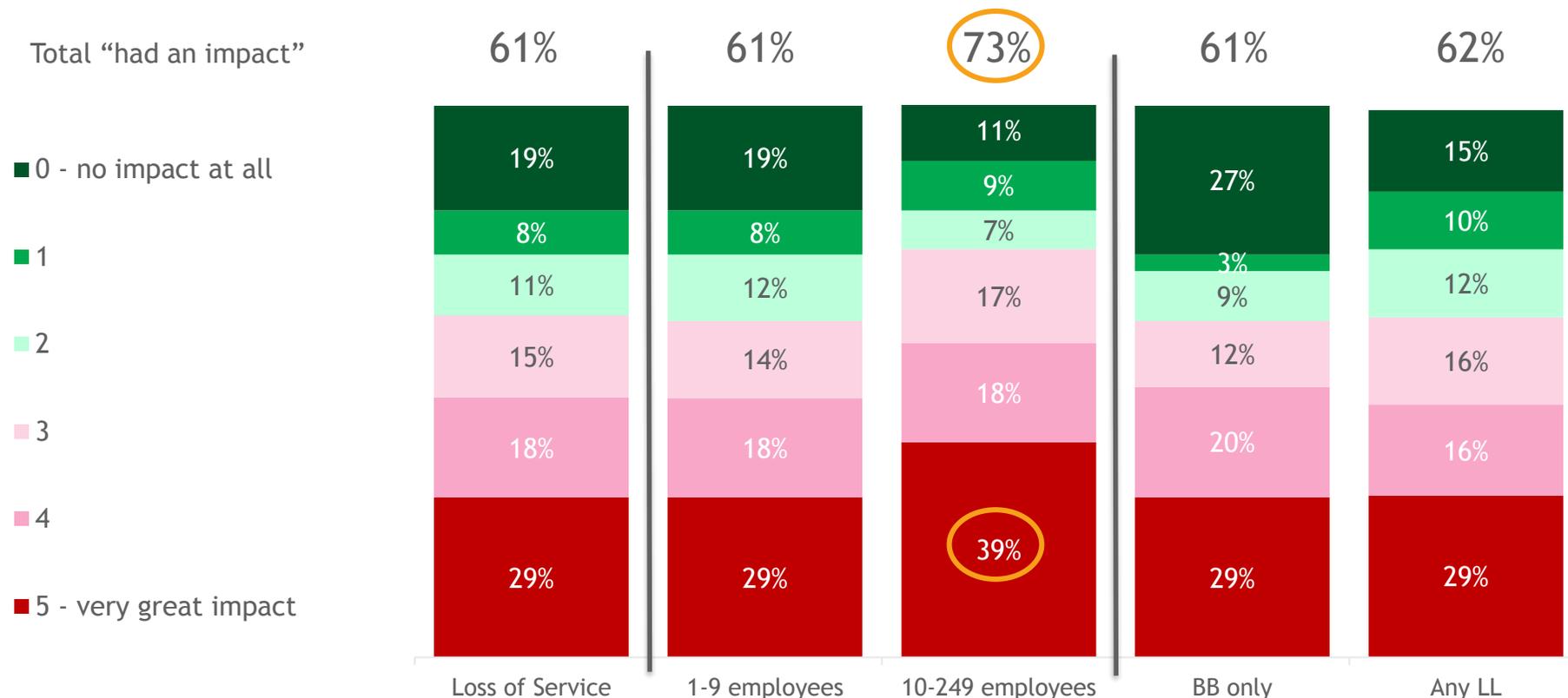
Impact of loss of service on communication needs of business



F3 Thinking back to when you experienced your most recent loss service. How much of an impact did this have on the communication needs of your business? Base: All that experienced a loss of service Total n=420, 1-9 n=251, 10-249 n=169 landline only n=90*, broadband only n=161, any landline n=259, landline and broadband together n=189 *CAUTION LOW BASE

Three fifths feel that the loss of their service had an impact on their business generally. Larger SMEs felt the impact more than smaller ones

Impact of loss of service on business generally



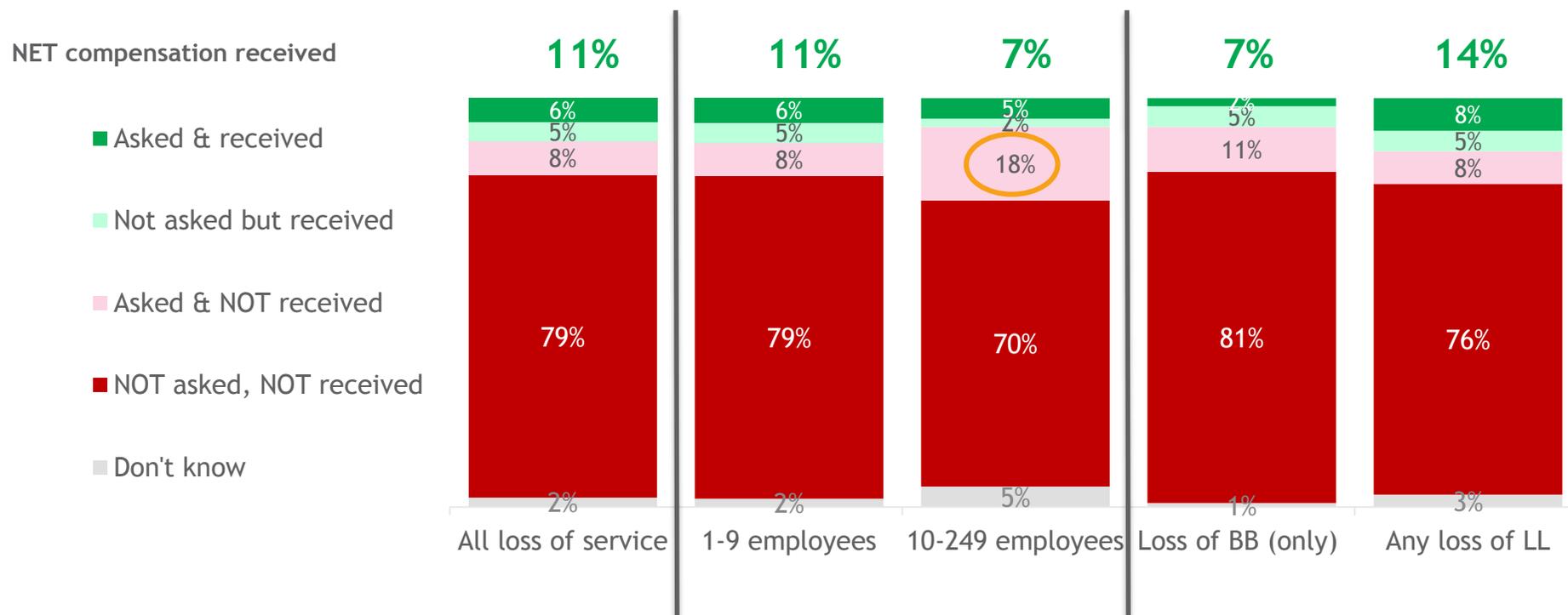
F15 How much of an impact did the loss of your {relevant service} / delay in service activation or upgrade have on your business? Base: All that experienced a loss of service Total n=420, 1-9 n=251, 10-249 n=169, landline only n=90, broadband only n=161, any landline n=259 *CAUTION LOW BASE

Section 5

Compensation for loss of service

11% received compensation for their LoS. Larger SMEs more likely to have asked for yet not received compensation for loss of service

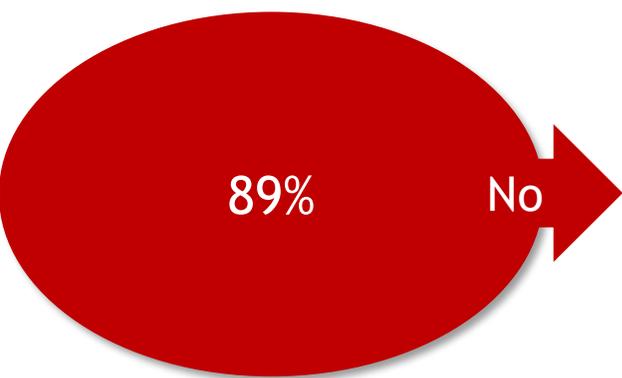
Compensation for loss of service



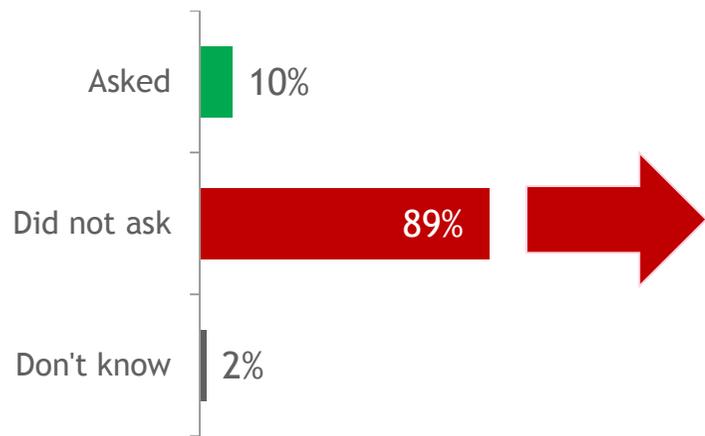
The vast majority have not asked for compensation - key reasons being a lack of expectation, a belief that it wouldn't be worth the effort or because the provider wasn't at fault

Experience of a loss of service (any LL/BB or LL&BB)

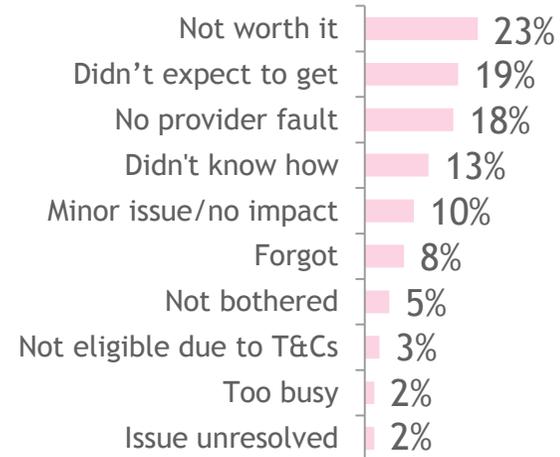
Received compensation for loss of service?



Asked for compensation?



Why not ask?

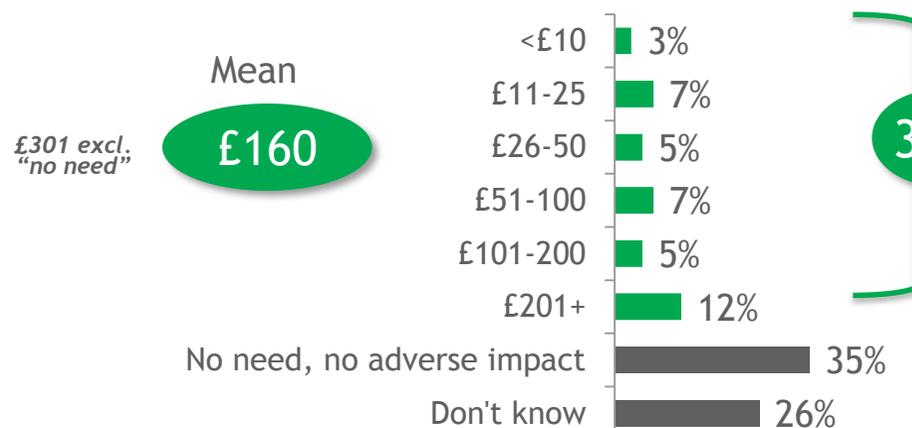


H1a Did you receive any compensation from your provider for this loss of service? All that experienced a loss of service n=420 H1c/d Did you ask for compensation or was it offered/did you ask for compensation in regard to the loss of service? Base: all that did not receive compensation n=384. H1e Why did you not ask for compensation? Base: all who did not get or ask for compensation n=321.

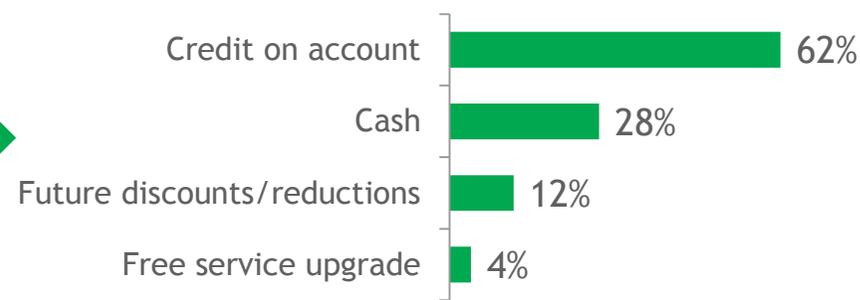
Around two-fifths would expect some compensation for loss of service. Majority of these would expect it in the form of account credit

Expected compensation (amongst all with loss of service yet not received/asked/offered)

Level of payment enough to compensate business for impact



Form would expect compensation to take

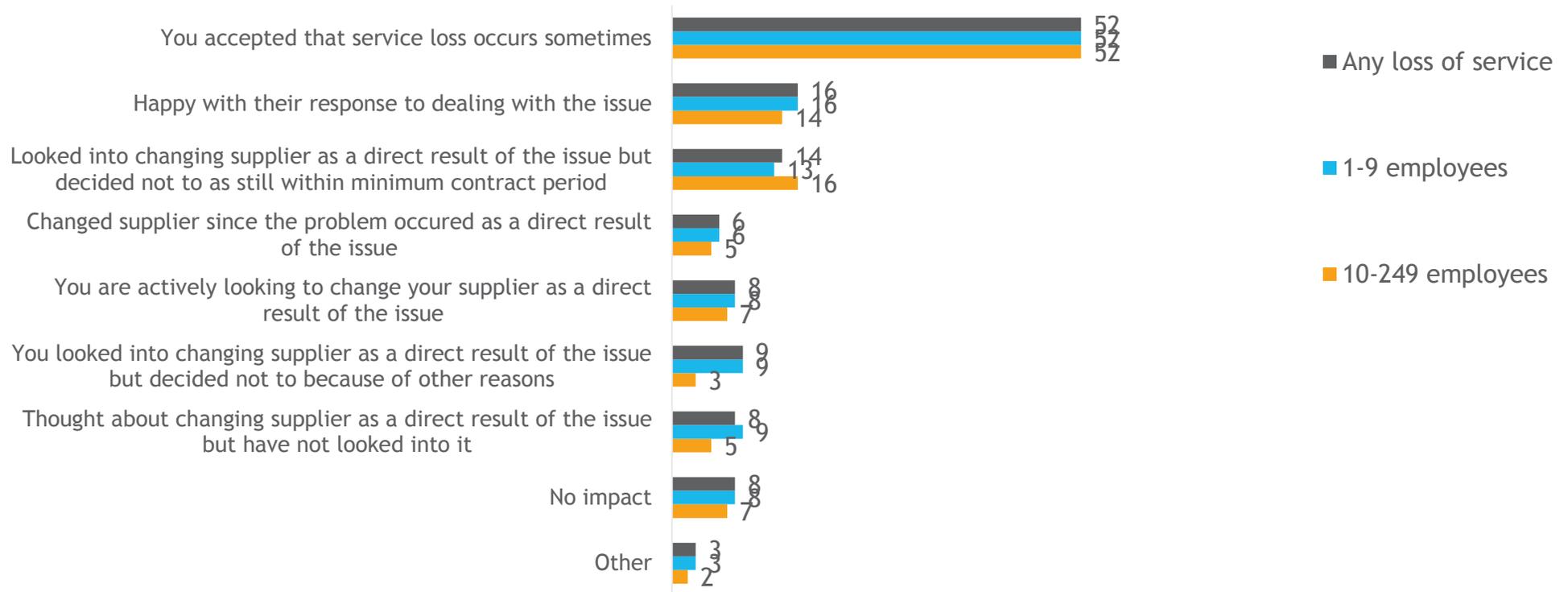


H1k Thinking back to the loss of service you have described and all of the impacts that the loss of service had on your business what level of payment do you think would be enough to compensate your business for that impact? All who experienced a complete loss of service but did not receive ask for or get compensation n=321
 H1l What form would you like that compensation to take? Base: all giving an amount n=129

More than half of SMEs accept that service loss can occur. Some have looked into switching as a result of service loss but only 6% have actually done so

Experience of loss of service (any LL/BB or LL&BB)

Impact on attitudes to supplier relationship



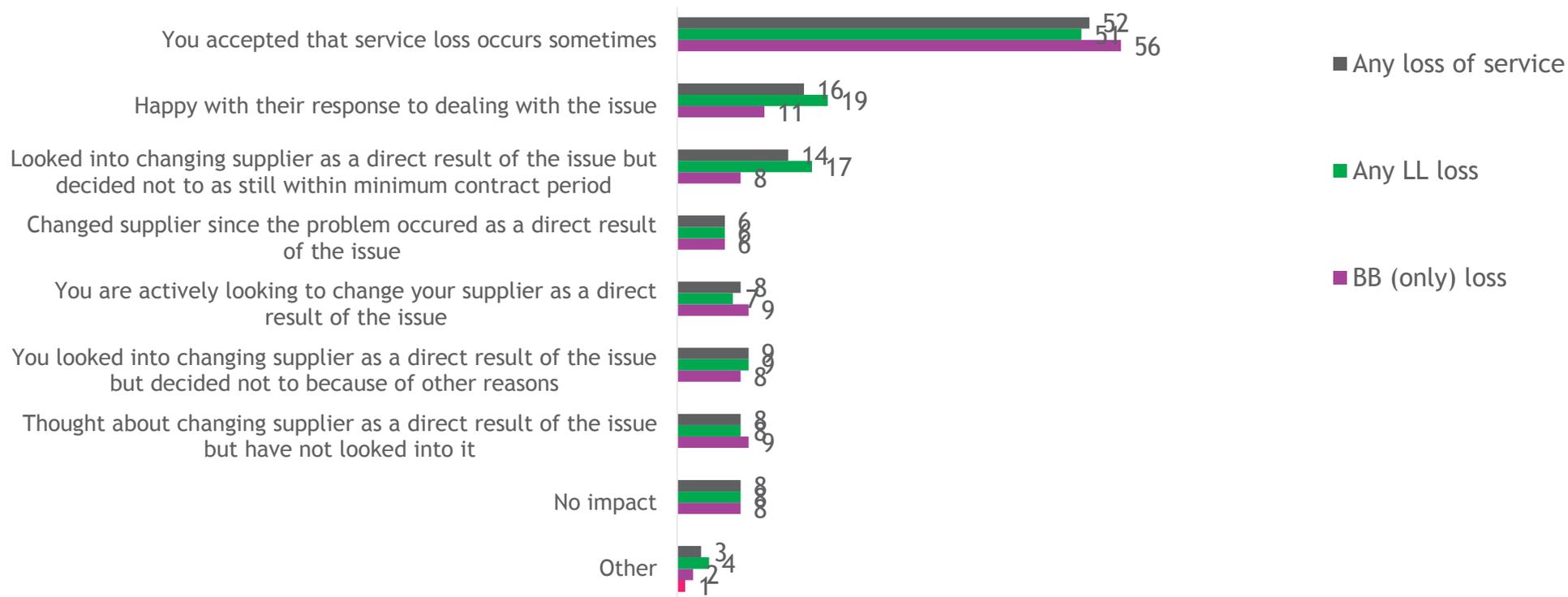
H1m Taking everything into account that happened when you lost service, the processes you went through and the time taken to get your service restored, has this had any of the following effects on your attitudes towards your relationship with the supplier?

Base: All who experienced loss of service for any/LL only/BB only/LL&BB n=420, 1-9 employees n=251, 10-249 employees n=169

More than half of SMEs accept that service loss can occur. Some have looked into switching as a result of service loss but only 6% have actually done so

Experience of loss of service (any LL/BB or LL&BB)

Impact on attitudes to supplier relationship



H1m Taking everything into account that happened when you lost service, the processes you went through and the time taken to get your service restored, has this had any of the following effects on your attitudes towards your relationship with the supplier?

Base: All who experienced loss of service for any/LL only/BB only/LL&BB n=420, Landline only n=90*, Broadband only n=161, Landline & Broadband n=169

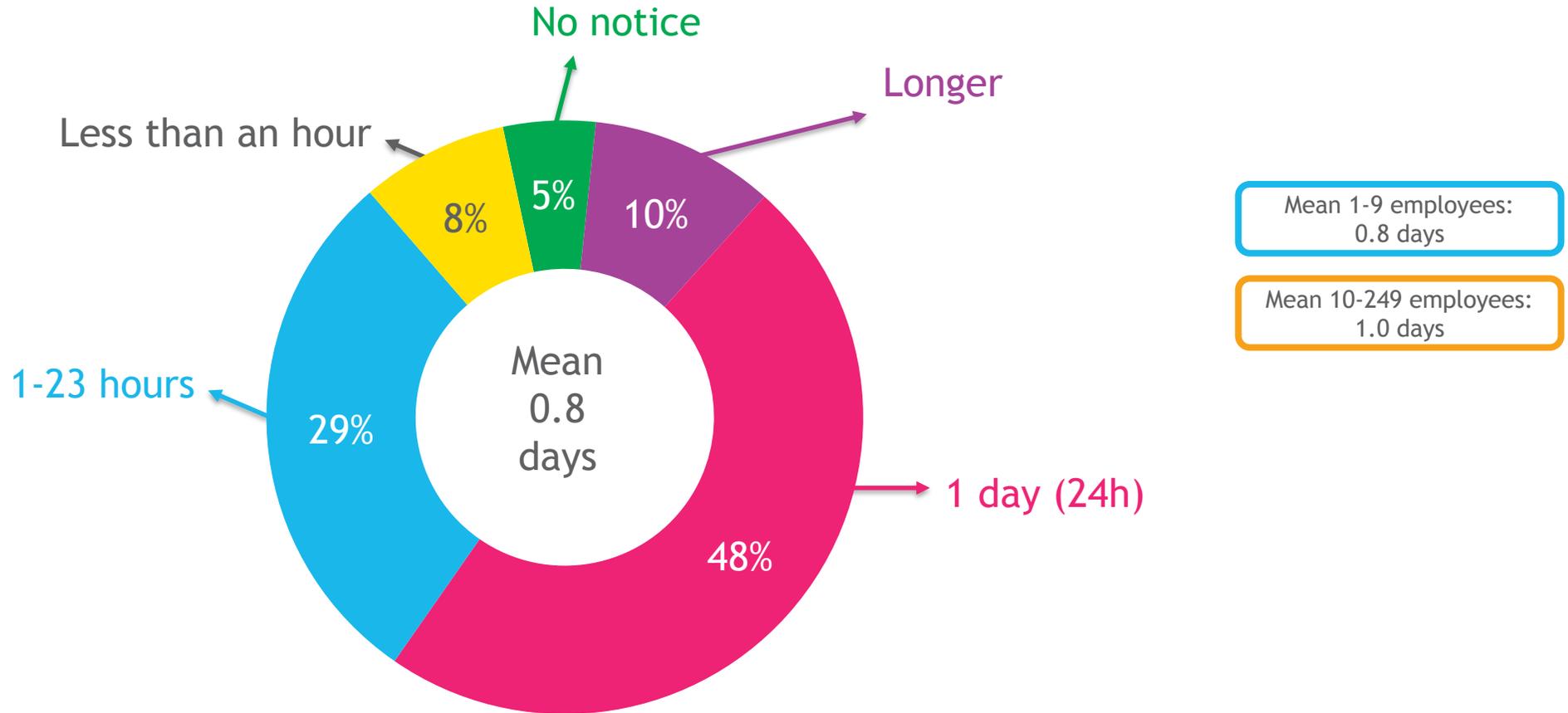
*CAUTION LOW BASE

Section 6

Experience of missed appointments and compensation

0.8 days on average is considered reasonable notice of a cancellation/change to an engineer appointment. Around half say 24 hours is sufficient.

Reasonable notice for an engineer appointment to be cancelled or changed by provider



I1 Some telephone line or broadband installation or repair processes require an engineer to visit the customer's home to carry out the work. Customers are usually given a specific time slot within which to expect the engineer's visit and sometimes engineers fail to arrive within the allotted time slot. What do you consider to be a reasonable amount of notice for an engineer appointment to be cancelled or changed by your provider? Please give your answer in hours or days.

Base: Total Sample with landline or broadband n=991

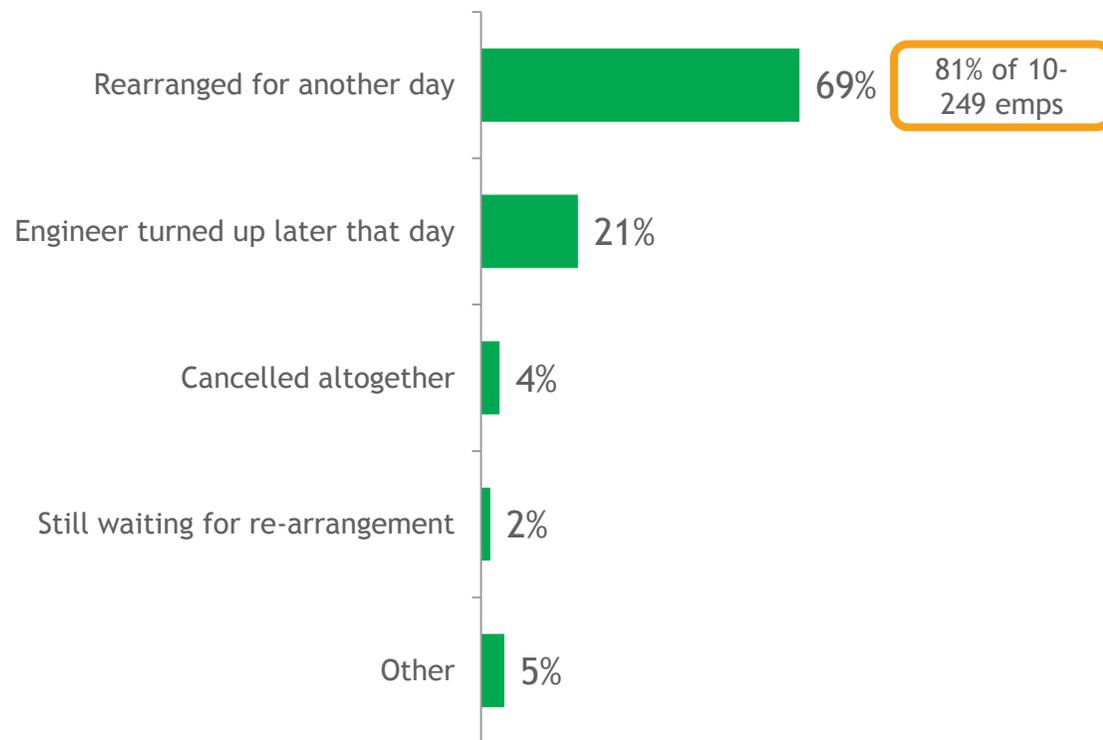
7% have had experience of a missed appointment (more than twice that amongst larger SMEs who are also more likely to have had more than one occurrence)

Experience of a missed appointment

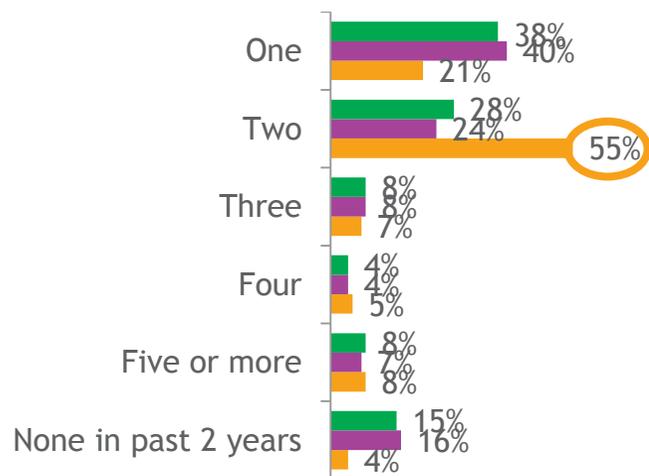
Ever experienced?



What happened after appointment missed (last 2 years)?



How many in last 2 years?



I1a Have you ever experienced a missed appointment regarding a landline and/or broadband service (i.e. where an engineer was scheduled to arrive at your home within a specified appointment window and did not turn up within that time)? This could be, for example, to install a new service or repair an existing service.

Base: Total Sample with a landline or broadband n=991. 1-9 employees n=641, 10-249 n=350. I2b Overall how many missed appointments have you experienced in the last two years? I3 What happened after the appointment was missed? Base: all that experienced a missed appointment n=108, 1-9 employees n=52*, 10-249 employees n=56*

*CAUTION LOW BASE

6 in 10 SMEs say they experienced anxiety and stress as result of the missed appointment. More than half took time to re-arrange or lost staff working time

Experience of a missed appointment

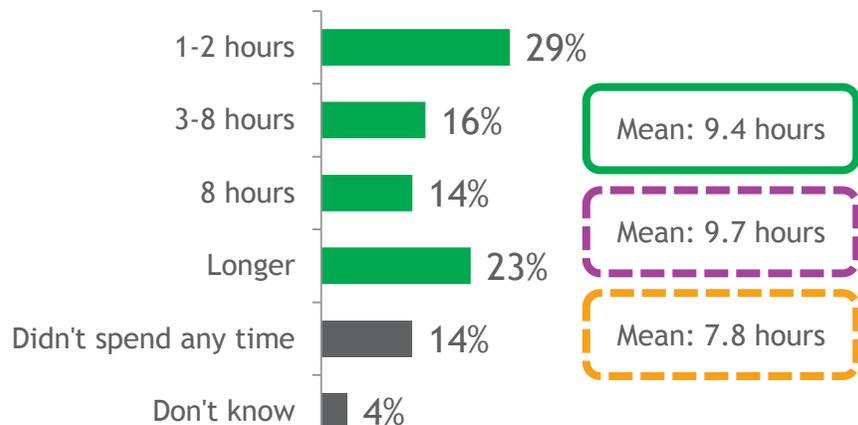
Ever experienced?



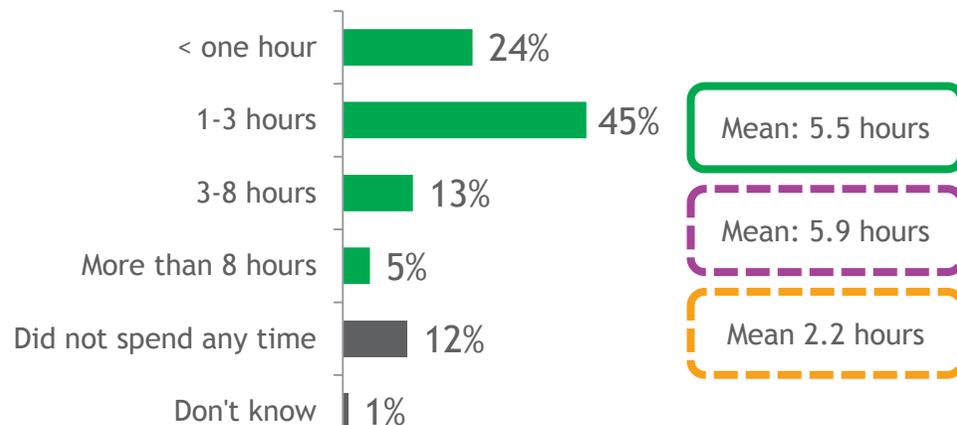
Which applied to most recent missed appointment?



Time spent waiting for engineer to arrive



Time spent trying to get another appointment

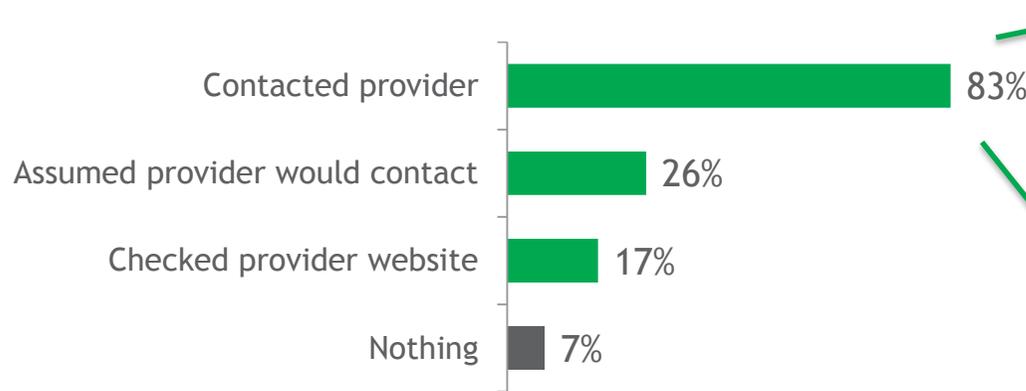


I2a Have you ever experienced a missed appointment regarding a landline and/or broadband service (i.e. where an engineer was scheduled to arrive at your business within a specified appointment window and did not turn up within that time)? This could be, for example, to install a new service or repair an existing service. Base: Total Sample n=2088. I4 How much time did you spend waiting for the engineer to arrive? I6 M4 Which, if any, of the following would you say applied to your most recent missed appointment? Base: all that experienced a missed appointment in past 2 years n=97*. I8 M9d How much time did you and other people in your business spend trying to get another appointment? (e.g. time spent on the phone with your provider). It should not include the time spent while waiting for the original missed appointment. *CAUTION LOW BASE

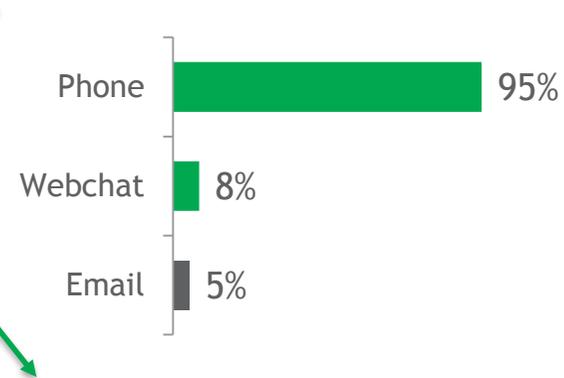
More than 8 in 10 SMEs contacted their provider to re-arrange the missed appointment (majority by phone). On average contact was made 3.4 times.

Experience of a missed appointment

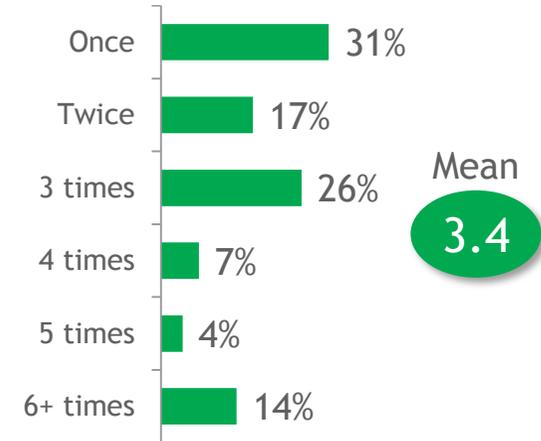
Actions taken by you/others to re-arrange



How contacted?



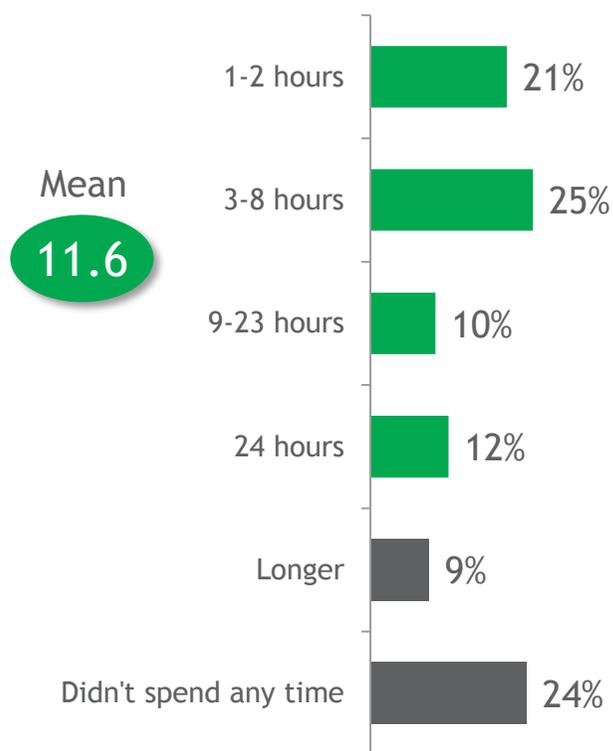
How many times contacted provider?



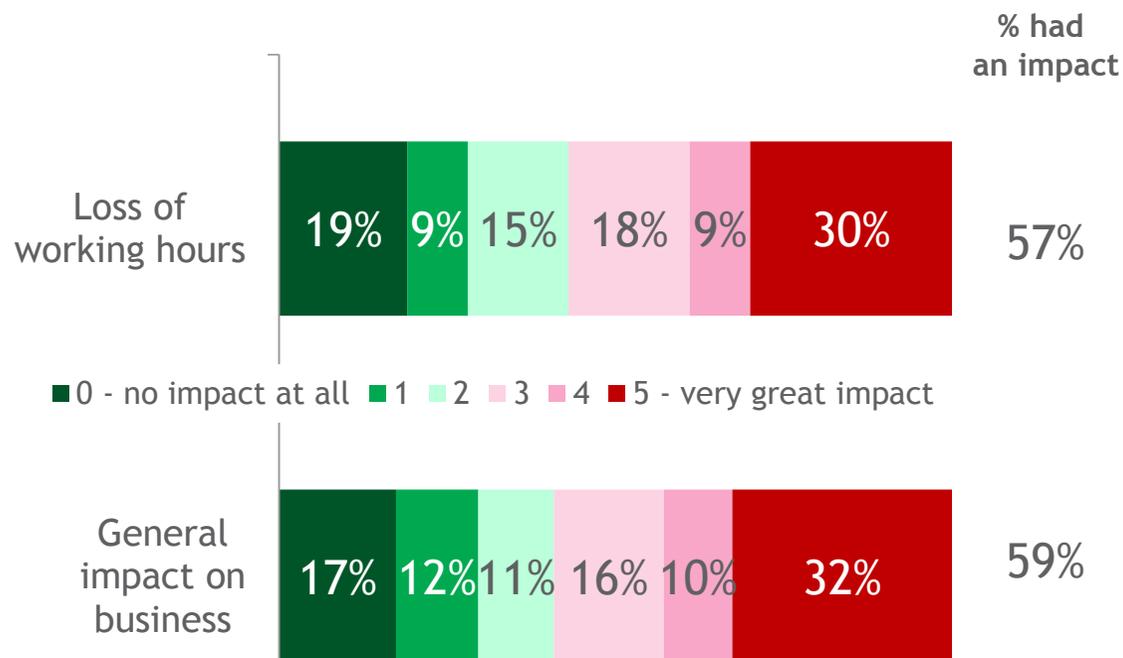
On average 12 working hours were lost as a result of the missed appointment and more than half felt it had had an impact on business or on working hours lost

Experience of a missed appointment

Approximate working hours lost as result



Impact of the missed appointment on business



I10 Approximately how many working hours do you think were lost as a result of your missed appointment? Please don't include the time taken to fix the issue
 I11 How much of an impact did this loss of working hours, have on your business Please use a scale of 0 to 5 where 0 denotes "No impact at all" and 5 denotes "Very great impact".
 I5 Thinking back to when you experienced a missed appointment, how much of an impact did this have on you and your business? Please use a scale of 0 to 5 where 0 denotes "No impact at all" and 5 denotes "Very great impact". Base: all that experienced a missed appointment in the past 2 years n=97*
 *CAUTION LOW BASE

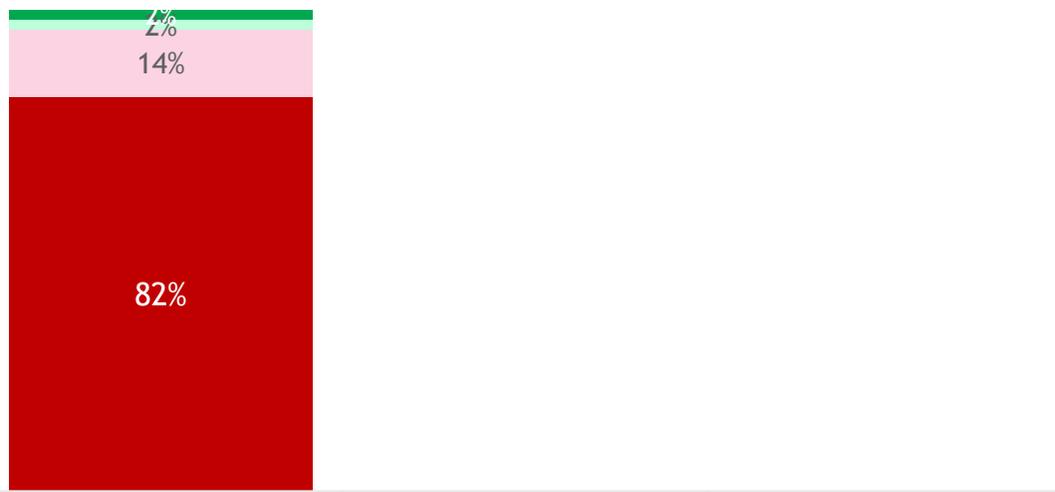
Overall, only 4% received compensation for their missed appointment

Missed appointment compensation

NET compensation received

4%

- Asked & received
- Not asked but received
- Asked & NOT received
- NOT asked, NOT received



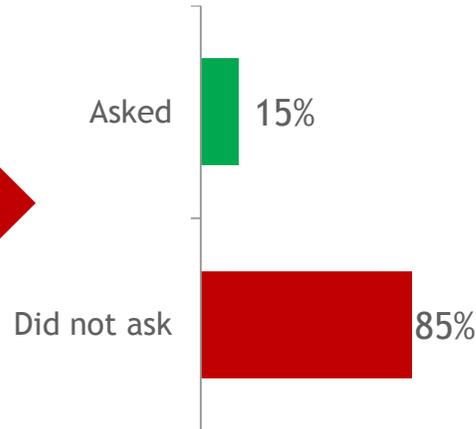
Only 4% received compensation for a missed appointment. Majority of SMEs had not asked for this anyway; largely because they either didn't expect to receive any or that the amount would not be worth the effort

Experience of a missed appointment

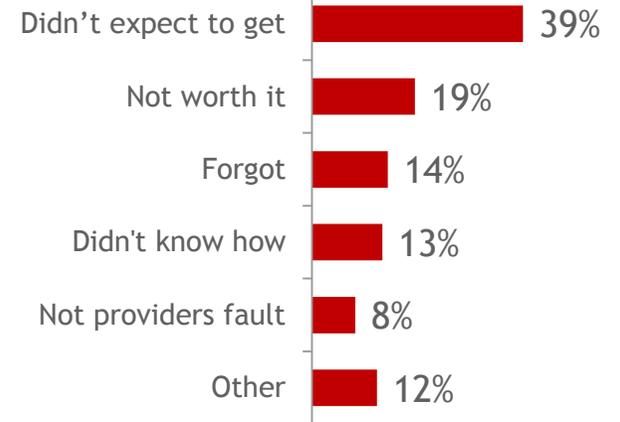
Received compensation for missed appointment?



Asked for compensation?



Why not ask?



59% of SMEs expect compensation for a missed appointment, 41% do not - mainly because “these things happen” or because it would have a minimal financial impact to their business

Hypothetical missed appointment

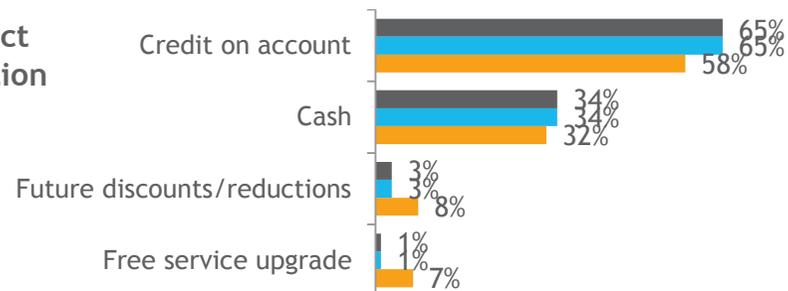
Expect to be compensated for a missed appointment?



59% expect compensation



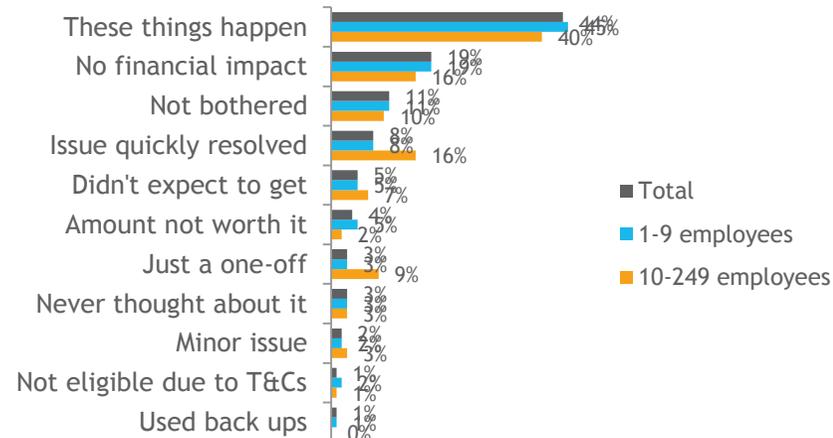
Form would expect compensation to take



41% not sure / expected



Why not expect to receive compensation?



I13a I'd like you to imagine a situation where you had been given an appointment time by your supplier for an engineer to visit your business to install, repair or upgrade one of your services and the engineer did not turn up at all. Would you expect to be compensated for this missed appointment? and if so, how much? Base: all that have not experienced a missed appointment n=883, 1-9 employees n=589, 10-249 employees n=294. I13b M23 Why would you not expect to receive any compensation for the missed appointment? Base: all who don't expect compensation n=289 I12c M24 What form would you expect that compensation to take? Base: all who gave amount n=204



Automatic compensation :

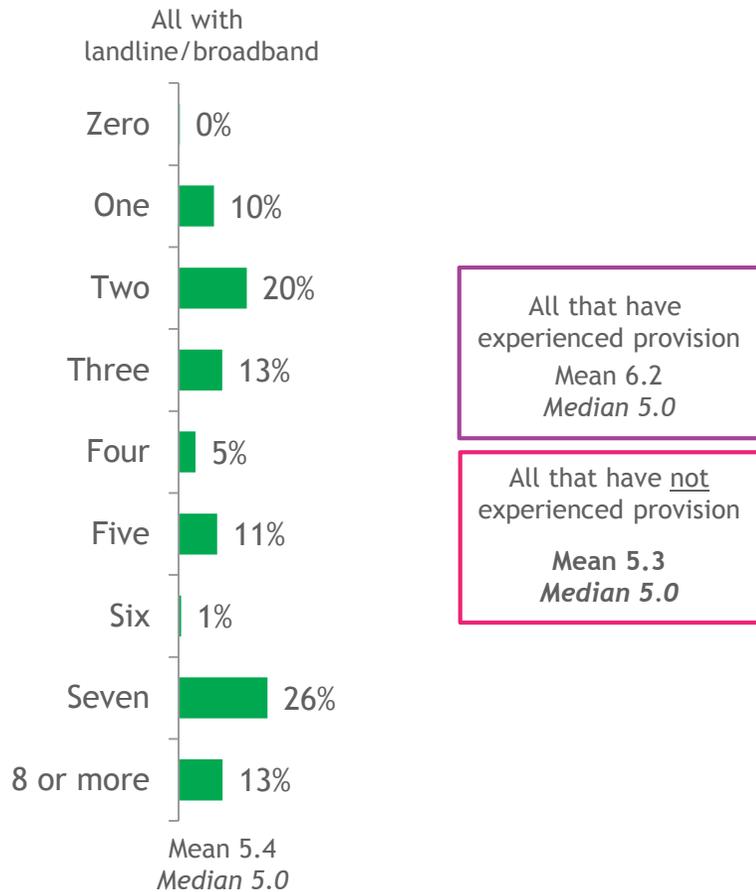
Minimum standards & willingness to pay more/less for better/worse service: Consumers



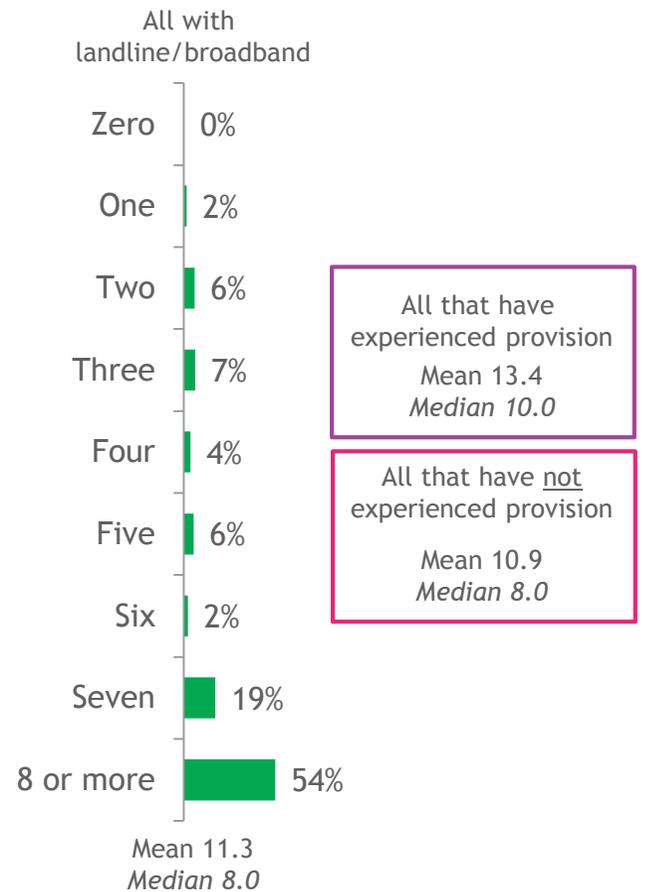
On average, 5 days is considered a reasonable wait time for an installation appointment. 11 days (1 ½ weeks) is considered to be unacceptable

CONSUMERS: Installation of a new fixed line broadband service or landline service

Reasonable wait time for appointment (days)



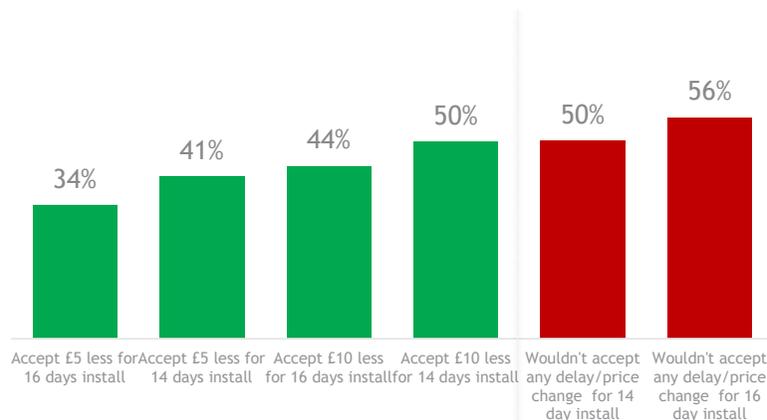
Unacceptable wait time for appointment (days)



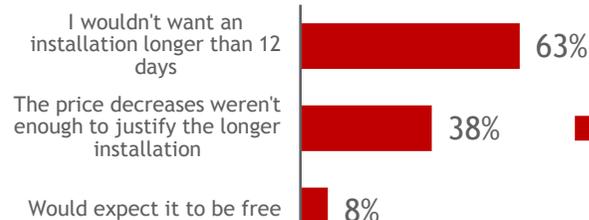
C1/C1h Please think back to when you experienced [E1a] for [fixed line/BB]. How long do you think it would have been *reasonable* to wait until the first suitable appointment for an engineer to visit? Reasonable' does not have to mean your 'ideal' situation, but one that would be generally satisfactory to you. Please give your answer in terms of calendar days C2 And what would be an *unacceptable* length of time to wait? Please give your answer in terms of calendar days landline/broadband installation n=1898 / experienced provision n=278 / all asked hypothetical question n=1620

Around half initially *claim* they would not accept a reduced price for a delayed install and slightly higher proportions would not pay more for a faster install

CONSUMERS: Installation of a new fixed line broadband service or landline service - Trade off scenarios



Unwilling to accept delayed install / reduction in price



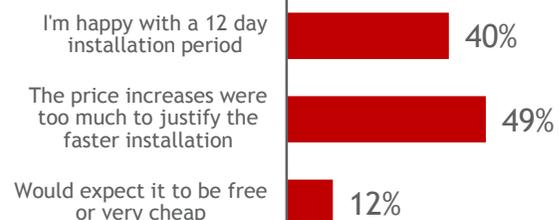
Price reduction would accept for 14 DAY installation

£23.30 mean
£20.00 median

No price reduction = 33%



Unwilling to pay more for faster install



Price would accept for 8 DAY installation

Pay nothing extra = 91%

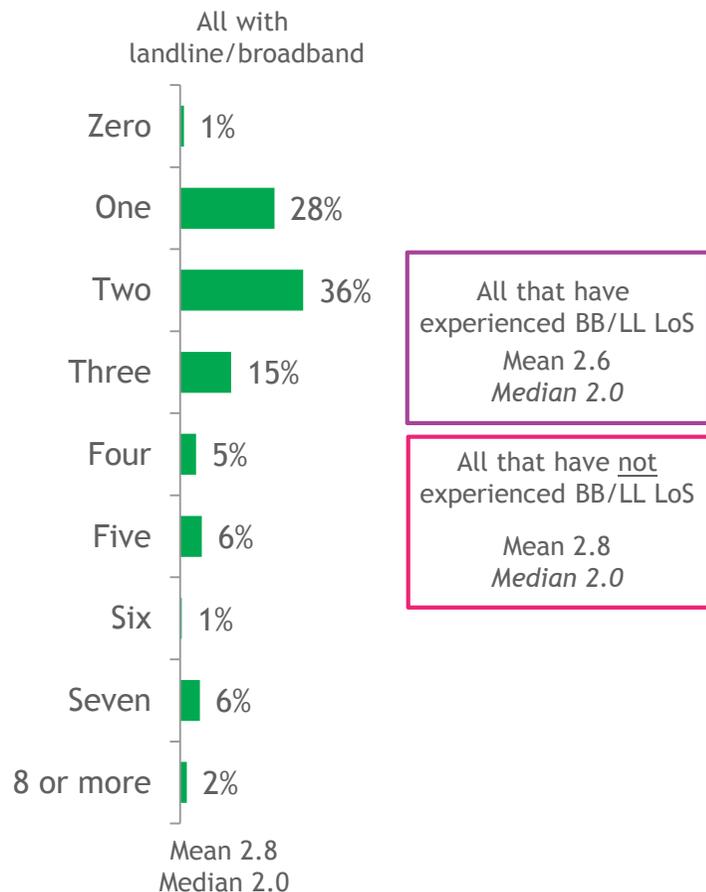
(Base too small to show acceptable prices)

C3 An appointment is usually available within 12 days for an engineer to visit you to install a fixed line service and the installation price is £40. Which of the following best describes why you would be unwilling to accept a slower installation at a cheaper price? Landline/broadband installation n=1898 All with landline/broadband unwilling to accept slower installation n=1069 C4 Which of the following best describes why you would be unwilling to pay a higher price for faster installation? All with landline/broadband unwilling to pay high price for faster installation n=1064

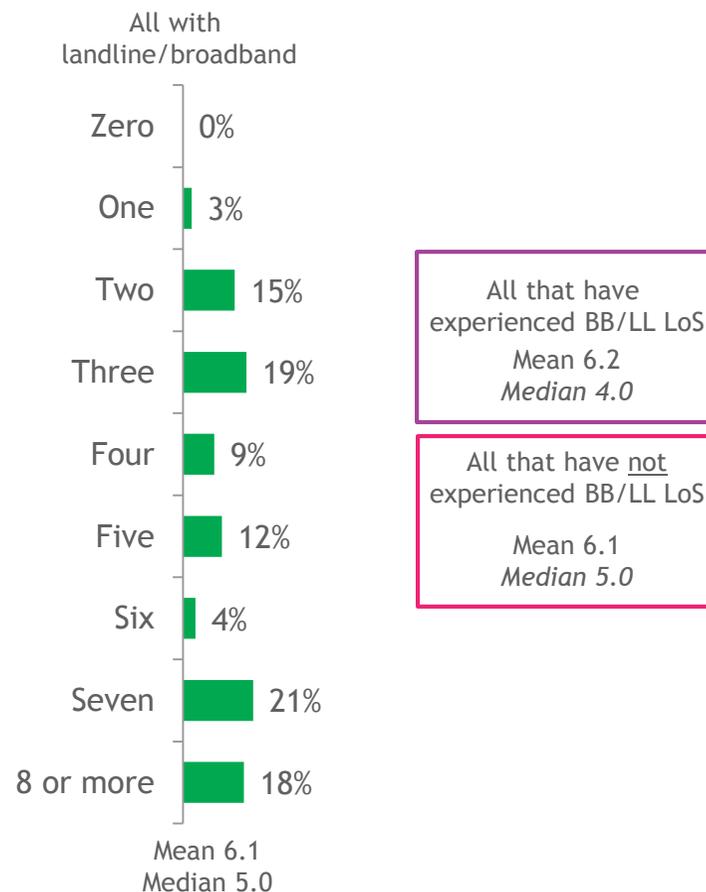
On average, 3 days is considered an reasonable wait time for a fault to be fixed. Just under a week (6 days) is considered to be unacceptable

CONSUMERS: Loss of service to fixed line broadband service or landline service

Reasonable wait time for fault to be fixed (days)



Unacceptable wait time for fault to be fixed (days)

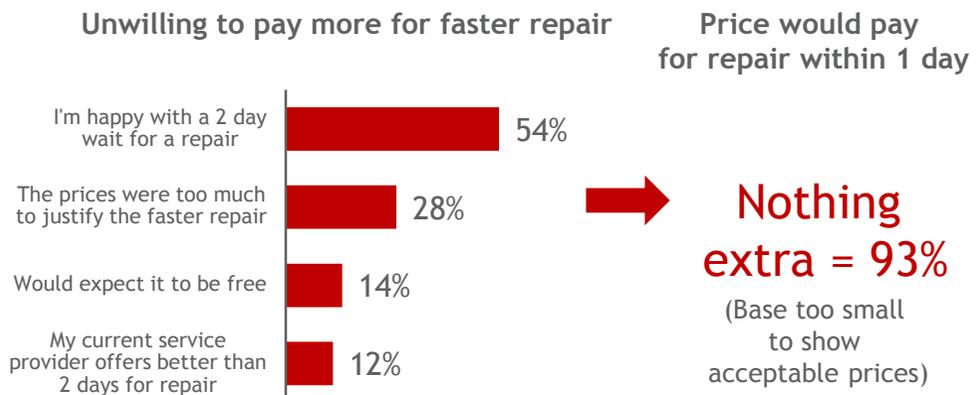
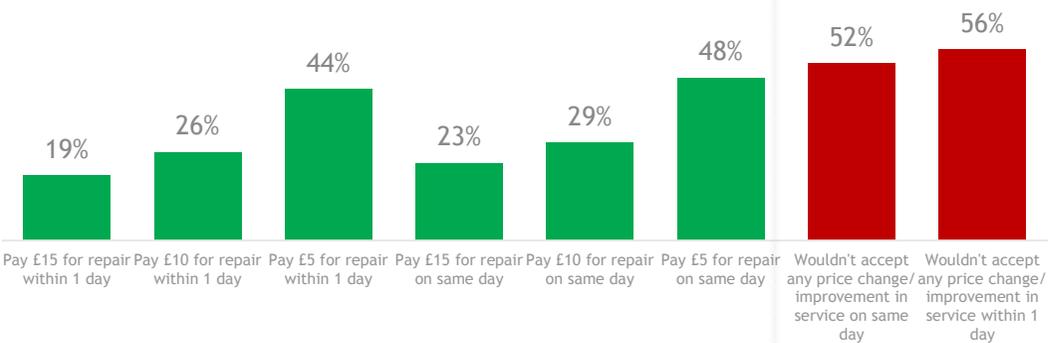
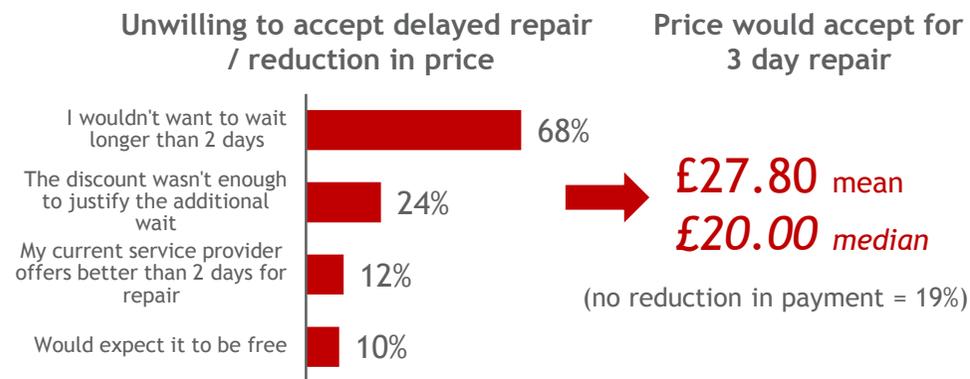
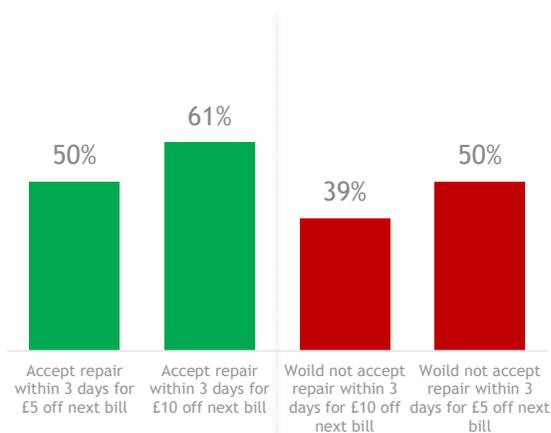


C5b Please think back to when you experienced loss of service for [fixed line/BB/mobile]. How long do you think it would have been reasonable to wait for the fault to be fixed? Reasonable' does not have to mean your 'ideal' situation, but one that would be generally satisfactory to you. Please give your answer in terms of calendar days

C6 And what would be an *unacceptable* length of time to wait? Please give your answer in terms of calendar days
 landline/broadband installation n=1898 / experienced loss of service n=345 / all asked hypothetical question n=1553

Half *claim* they would not accept a £5 reduction in price for a delayed repair, whilst more than half would not pay more for a faster repair

CONSUMERS: Loss of service to fixed line broadband service or landline service - Trade off scenarios



C7 Which of the following best describes why you would be unwilling to accept a slower repair time for a discount off your net bill?

landline/broadband installation n=1898 All with landline/broadband unwilling to accept slower repair time n=736

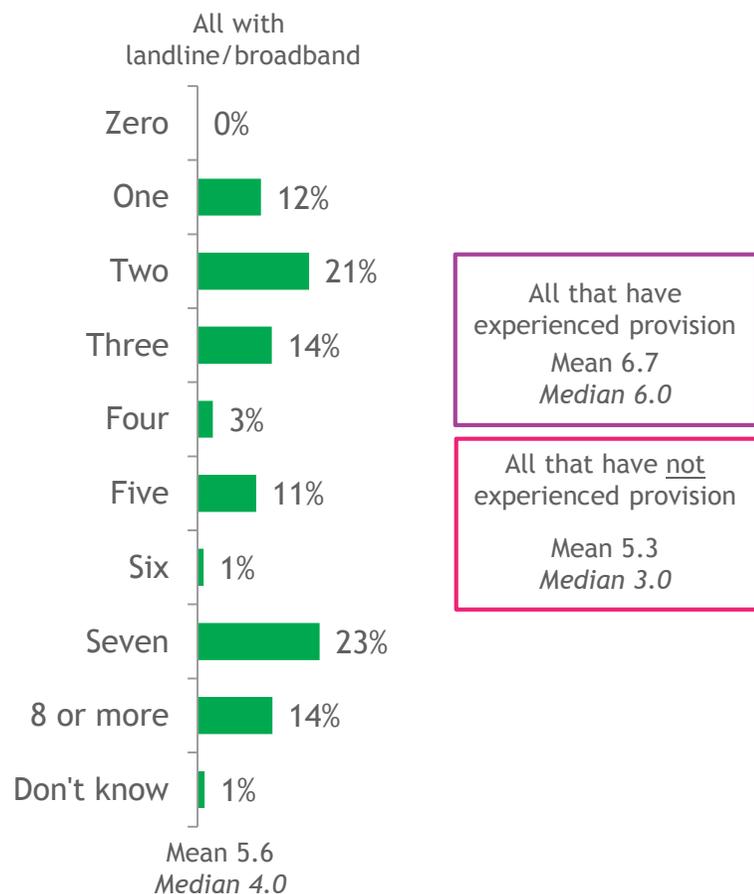
C8 Which of the following best describes why you would be unwilling to pay a price for a faster repair?

All with landline/broadband unwilling to pay high price for faster installation n=990

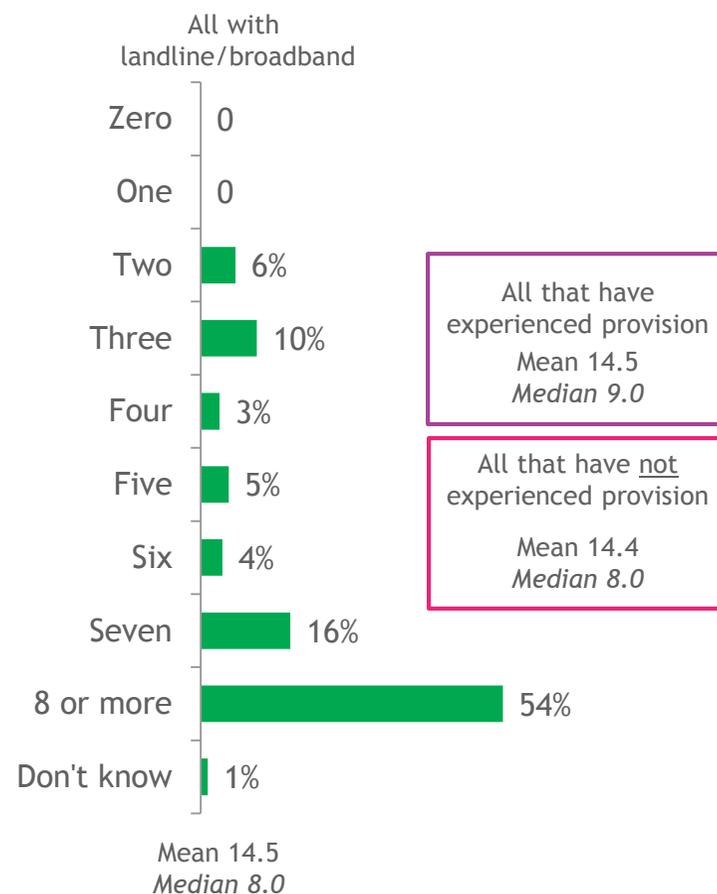
On average, 5 ½ days is considered an reasonable wait time for an installation appointment. 14 ½ days (2 weeks) is considered to be unacceptable

SMEs: Installation of a new fixed line broadband service or landline service

Acceptable wait time for appointment (days)



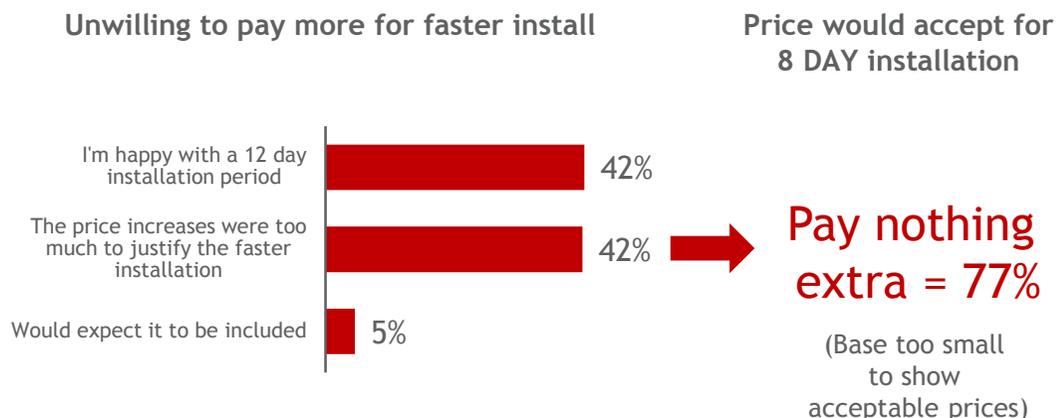
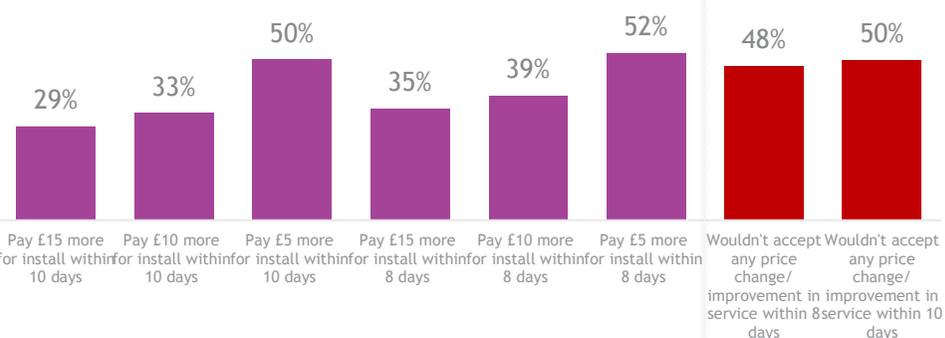
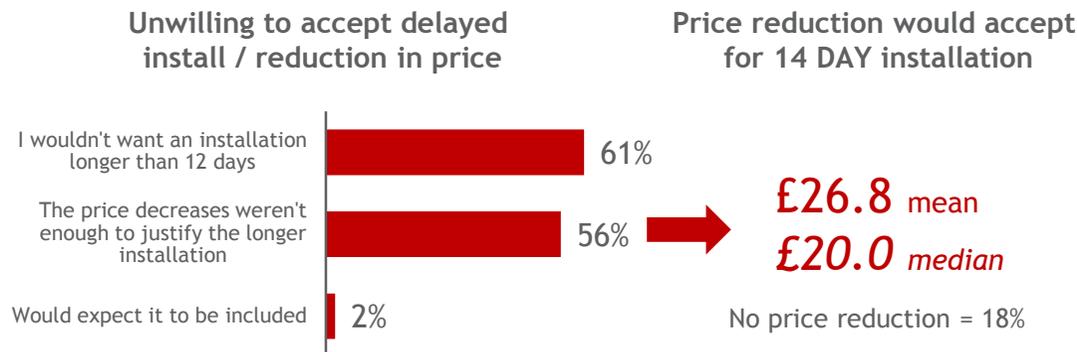
Unacceptable wait time for appointment (days)



C1/C1h Please think back to when you experienced [E1a] for [fixed line/BB]. How long do you think it would have been *reasonable* to wait until the first suitable appointment for an engineer to visit? Reasonable' does not have to mean your 'ideal' situation, but one that would be generally satisfactory to you. Please give your answer in terms of calendar days C2 And what would be an *unacceptable* length of time to wait? Please give your answer in terms of calendar days landline/broadband installation n=990 / experienced provision n=232 / all asked hypothetical question n=758

Around half initially *claim* they would not accept a reduced price for a delayed install and a similar proportion would not pay more for a faster install

SMEs: Installation of a new fixed line broadband service or landline service - Trade off scenarios

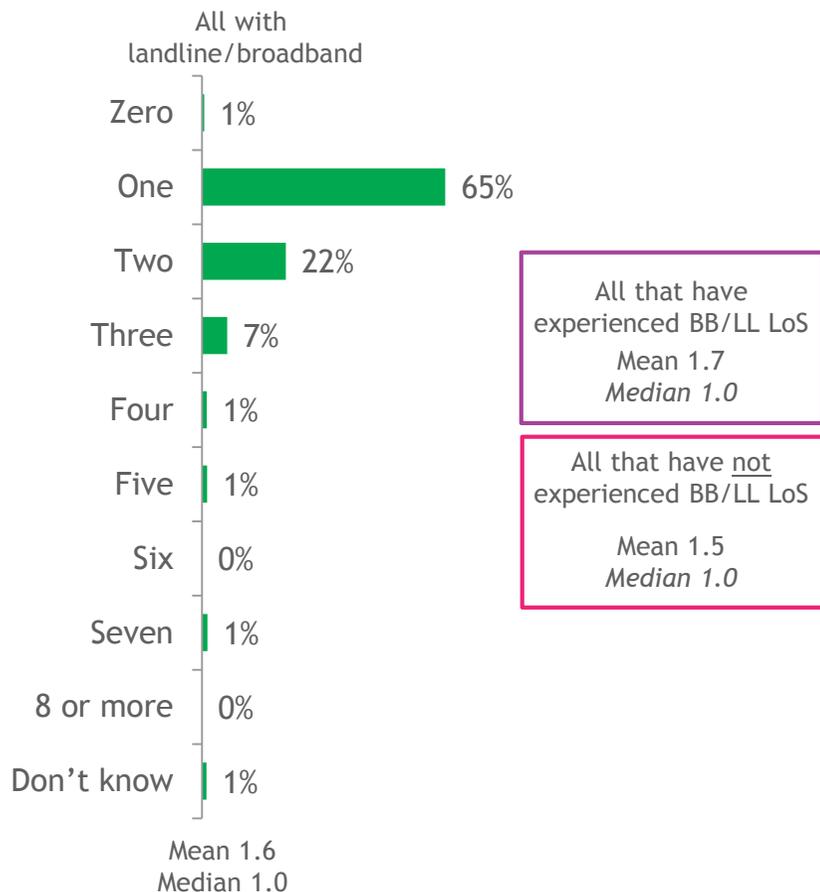


C3 Which of the following best describes why you would be unwilling to accept a slower installation at a cheaper price?
landline/broadband installation n=990 All with landline/broadband unwilling to accept slower installation n=604
C4 Which of the following best describes why you would be unwilling to pay a higher price for faster installation?
All with landline/broadband unwilling to pay high price for faster installation n=388

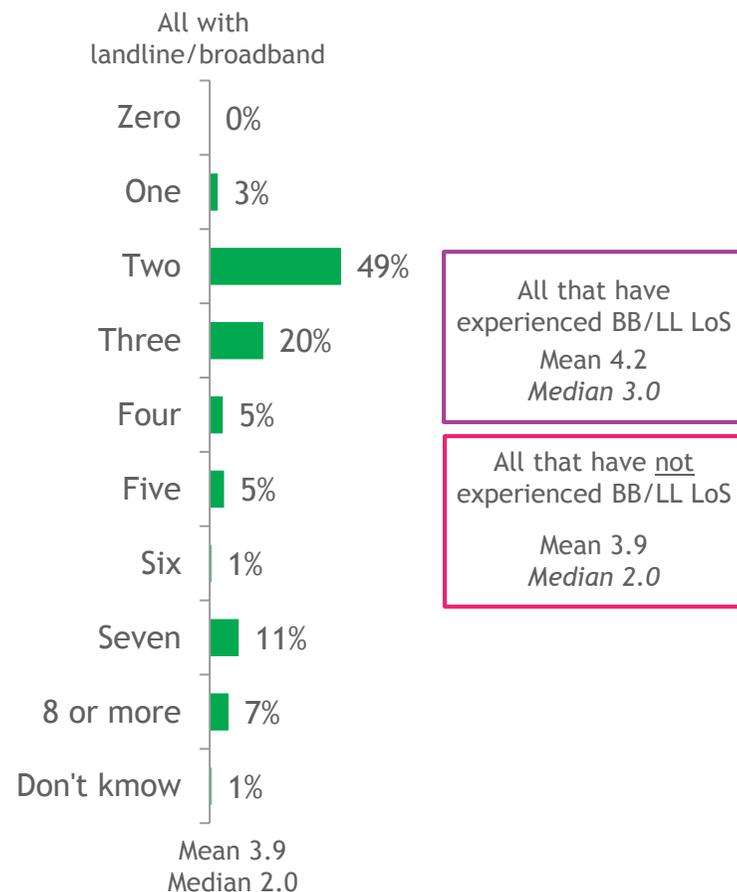
On average, 1 ½ days is considered an reasonable wait time for a fault to be fixed. Half a week (3.9 days) is considered to be unacceptable

SMEs: Loss of service to fixed line broadband service or landline service

Acceptable wait time for loss of service (days)



Unacceptable wait time for loss of service (days)

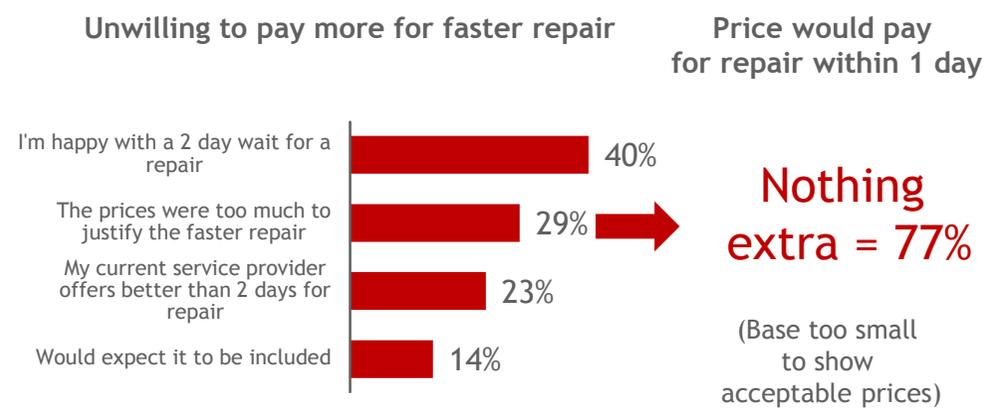
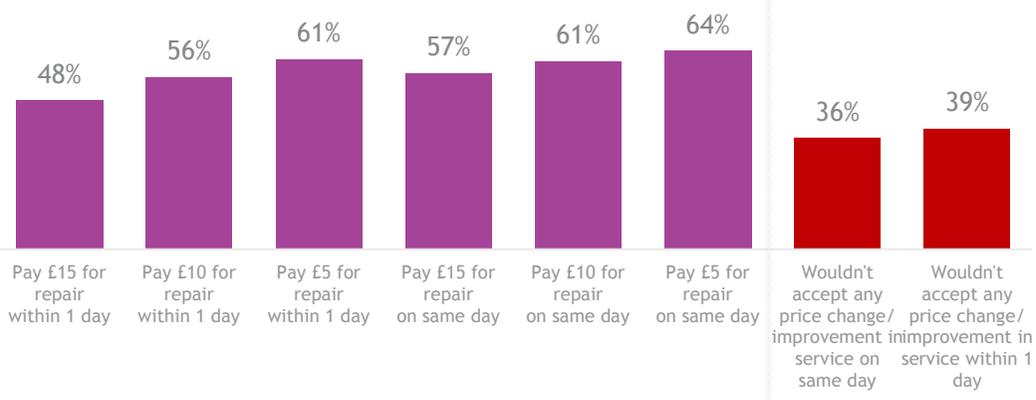
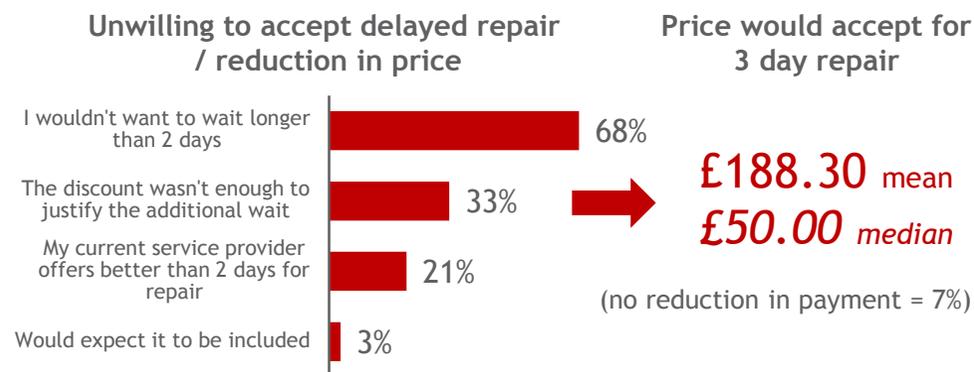
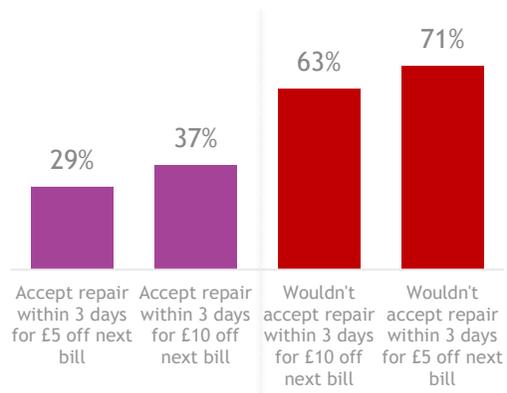


C5b Please think back to when you experienced loss of service for [fixed line/BB/mobile]. How long do you think it would have been reasonable to wait for the fault to be fixed? Reasonable' does not have to mean your 'ideal' situation, but one that would be generally satisfactory to you. Please give your answer in terms of calendar days

C6 And what would be an *unacceptable* length of time to wait? Please give your answer in terms of calendar days
 landline/broadband installation n=990 / experienced loss of service n=339 / all asked hypothetical question n=651

3 in 5 *claim* they would not accept a reduced price for a delayed repair, whilst 1 in 3 would not pay more for a faster repair

SMEs: Loss of service to fixed line broadband service or landline service - Trade off scenarios



C7 Which of the following best describes why you would be unwilling to accept a slower repair time for a discount off your net bill?

landline/broadband installation n=990 All with landline/broadband unwilling to accept slower repair time n=705

C8 Which of the following best describes why you would be unwilling to pay a price for a faster repair?

All with landline/broadband unwilling to pay high price for faster installation n=339



Automatic compensation :
Consumer experience of provisioning delays, loss of
service and missed appointments

Mobile Service Research:
Consumers



Mobile research: Consumer executive summary (1)

- ❑ **Consumers have a greater reliance on mobile and broadband than Landline**
 - 2 in 3 say their HH would struggle to function without these vs. 1 in 4 for landline
- ❑ **Price is the dominant factor in the choice of mobile provider (67%).** Data allowance (20%) and reliability (19%) are the next most important factors
- ❑ **1 in 10 (8%) experienced a loss of service in an area where they would normally get good coverage, in the last 12 months**
 - Almost half (46%) reported this to their provider
 - On average, this LoS lasted for 3.3 days
- ❑ **Loss of contactability (45%) was the key impact faced by households, along with inability to use apps (24%), negative impact on work activities (22%) and stress (19%)**
- ❑ **77% of HHs experienced no direct financial costs, whilst 12% were unsure.** Of the 11% that did experience costs, the average additional cost was c£8
- ❑ **More than half did nothing to reduce the impact of their LoS**
 - 29% used their landline to make calls and 14% used it to receive calls
 - 44% felt frustrated by the loss of service, 31% were annoyed and 30% stressed
- ❑ **59% tried to restore their mobile service, with 37% contacting their provider and 23% rebooting their device.** On average consumers spent c3 days trying to get their mobile service fixed, although half (49%) spend no time at all

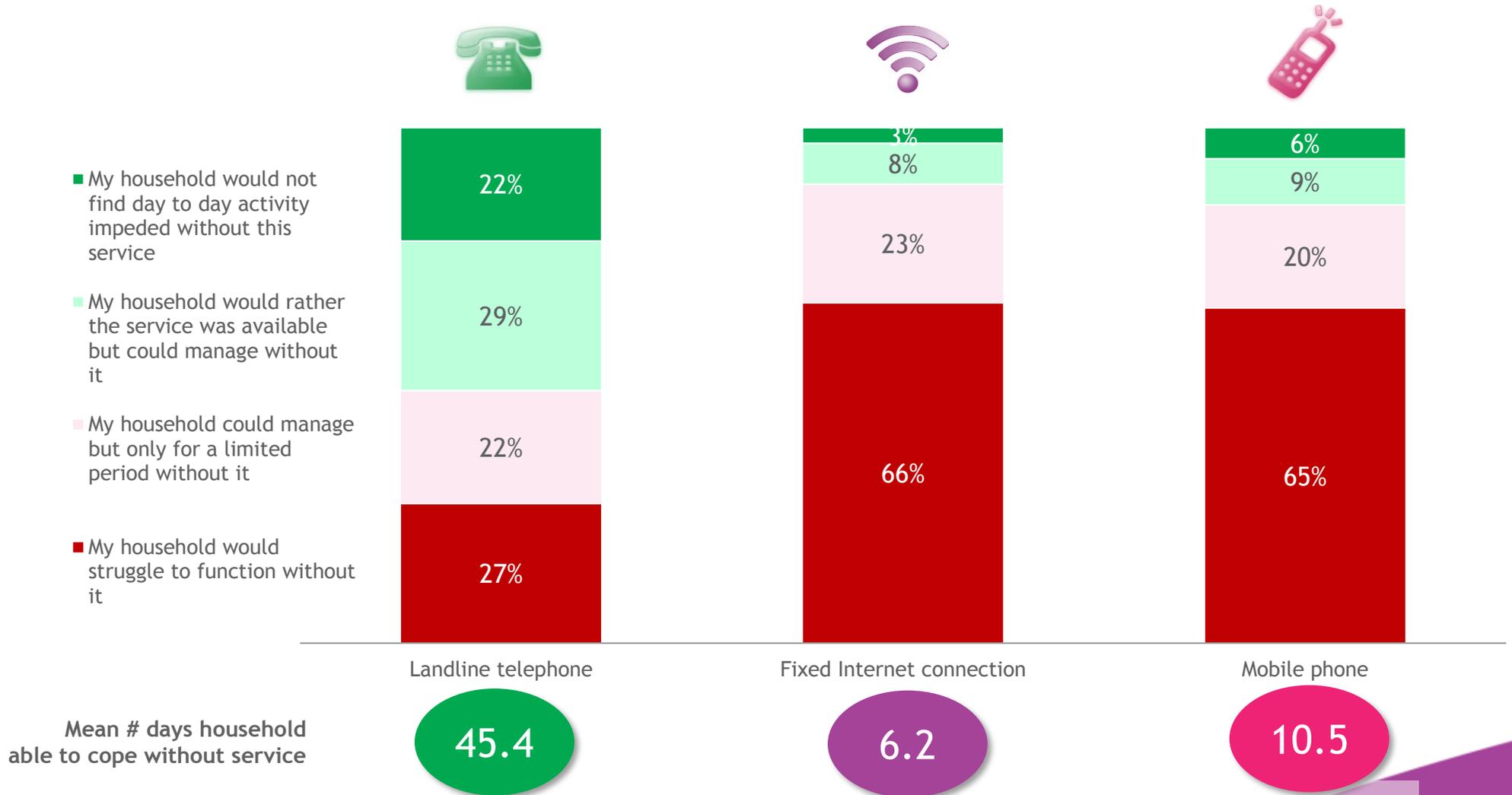
Mobile research: Consumer executive summary (2)

- ❑ Only 8% received compensation for their LoS, with 1% asking for it. Of those that did not receive compensation, 8% asked for it and 89% did not (3% didn't know)
- ❑ After probing, 18% expect to be compensated for the impact of their LoS. On average, they expect c£13 - to be paid as a credit on their account or cash
- ❑ Three quarters (74%) describe their loss of mobile service as 'very or fairly inconvenient'
- ❑ Half (50%) feel that regular progress updates from providers would be useful during a future loss of service



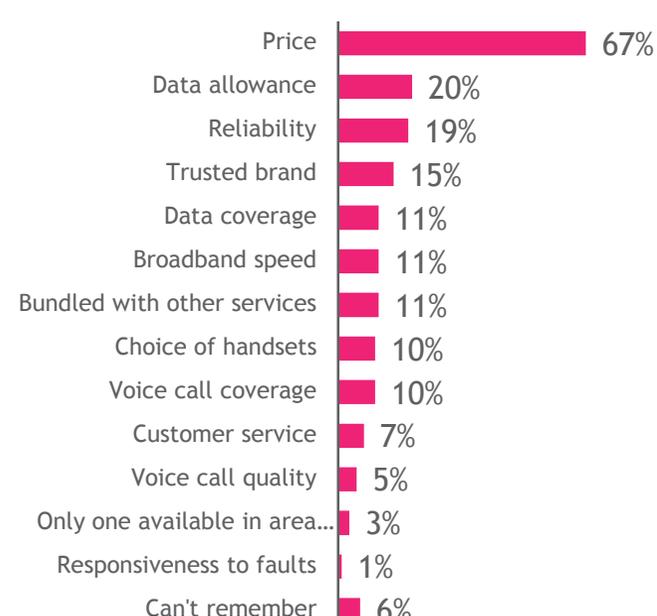
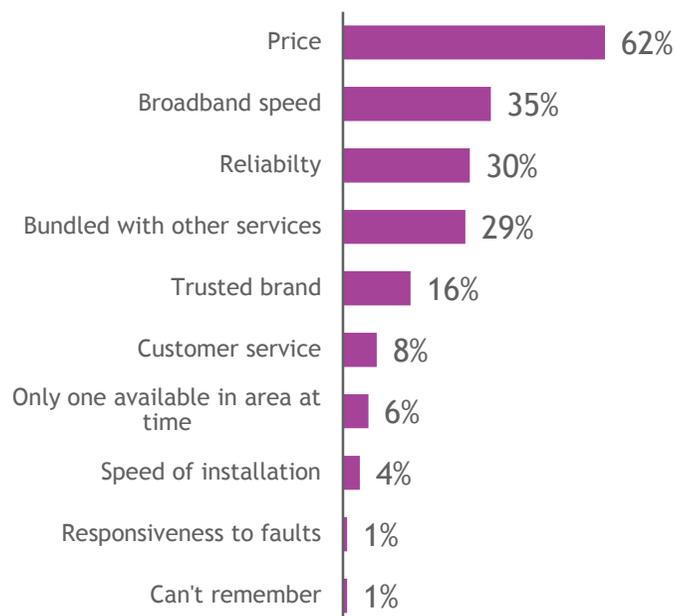
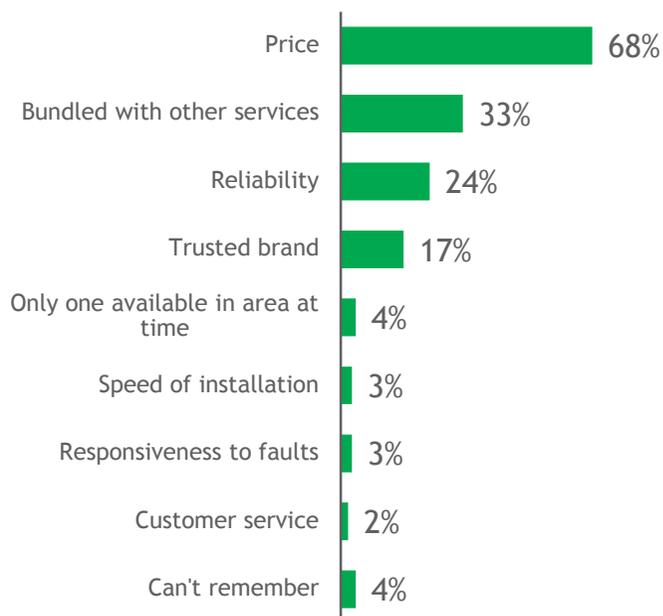
Greater reliance on Internet and Mobile than Landline. Two-thirds say household would “struggle to function” without these. Households feel they could cope just under a week without Internet (much longer for landline).

Importance of telecoms services currently used



Price is the dominant factor in choice of provider across services. This is especially the case when it comes to Mobile services

Main factors that influenced choice of provider (unprompted)

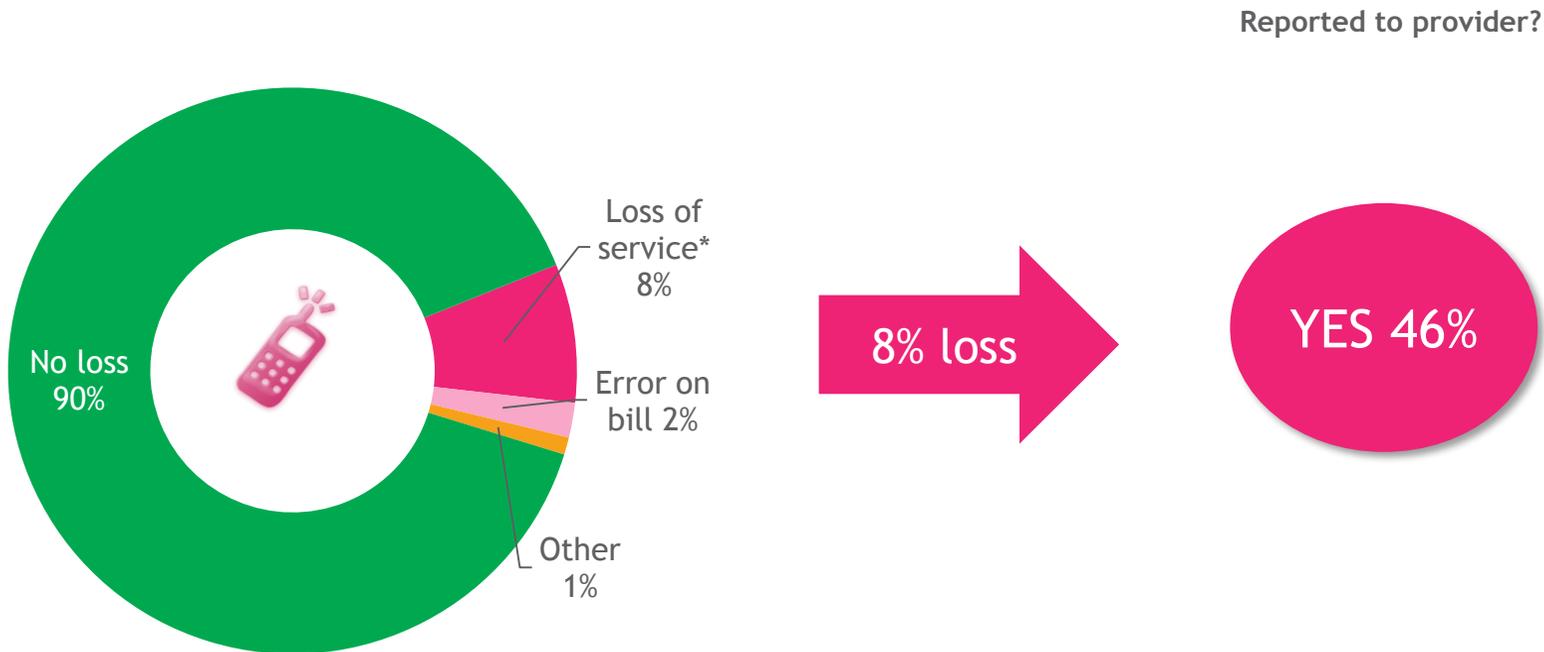


WAVE 2 CONSUMER: C2a/b/c. Thinking back to when you chose your (service), what were the main factors that influenced your choice of provider?

Base: All that have a landline but no fixed broadband and changed their provider in the last 10 years n=96, all that have a fixed broadband connection and changed their provider in the last 10 years n=1479, all with a mobile service n=1931

8% of mobile users have experienced loss of service in an area where they would normally get good coverage. Almost half reported this to their provider.

Experienced loss of voice and/or data services on mobile phone?



WAVE 1 CONSUMER: E2a Over the last 12 months, have you experienced any of the following in relation to your mobile phone? Base: All who use a mobile n=1872

*Loss of service in an area where you would normally get good coverage, for more than 1 hour. E2b did you report this loss of service to your provider? Base: all mobile loss of service n=137



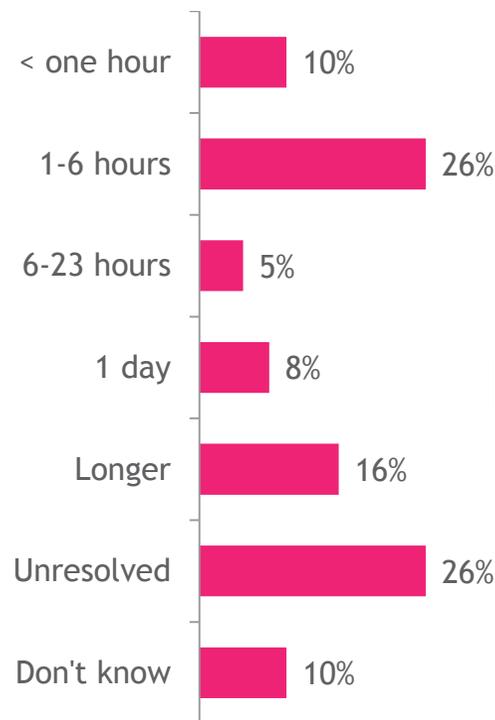
In a third of cases the loss was fixed without a report to the provider; on average restoration of service was 3.3 days but a quarter of cases remained unresolved and for a fifth the same fault reoccurred following the fix

Experience of loss of mobile service

Reported to provider?

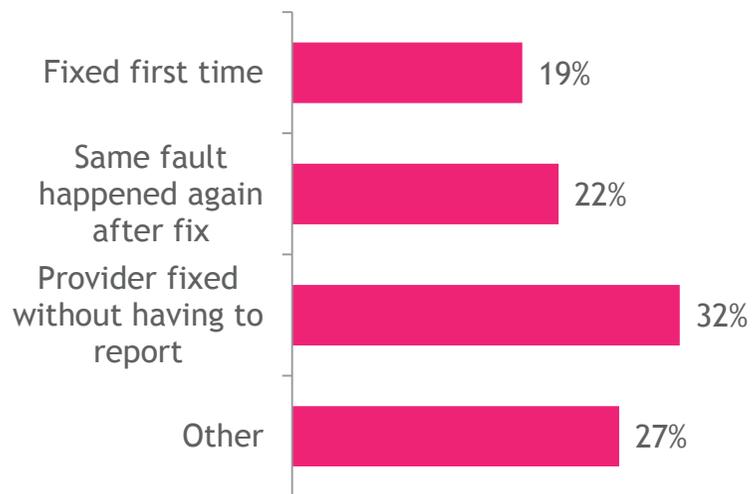


How long initially took to restore mobile service to normal?



Mean: 3.3 days

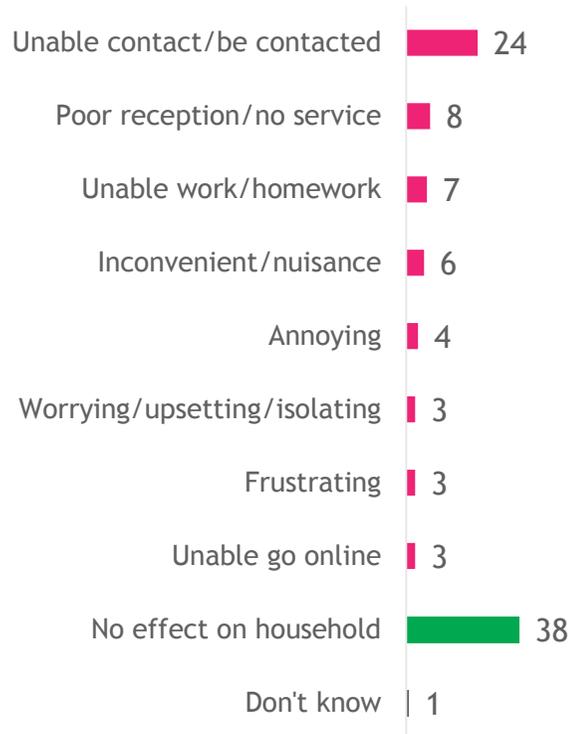
What happened following loss of mobile service?



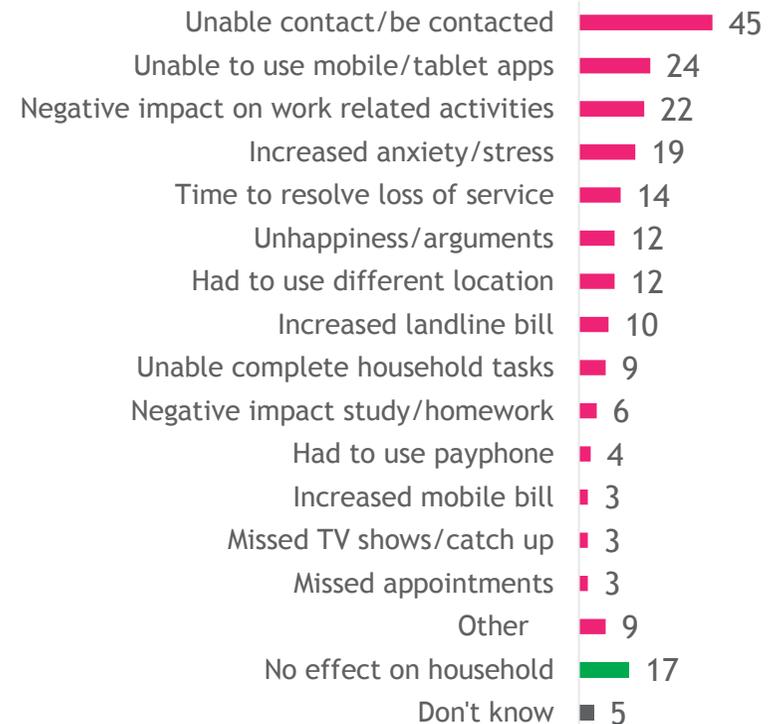
Loss of contactability was the key impact faced by households. When prompted, around a quarter mentioned inability to use apps and around a fifth a negative impact on work or increased anxiety/stress

Experience of loss of service

Household impacts (unprompted)



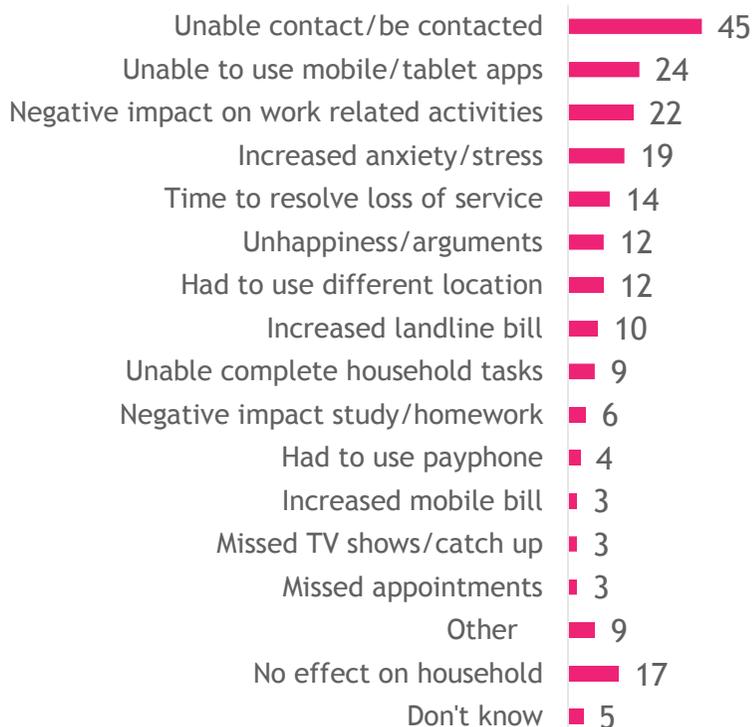
Household impacts (prompted)



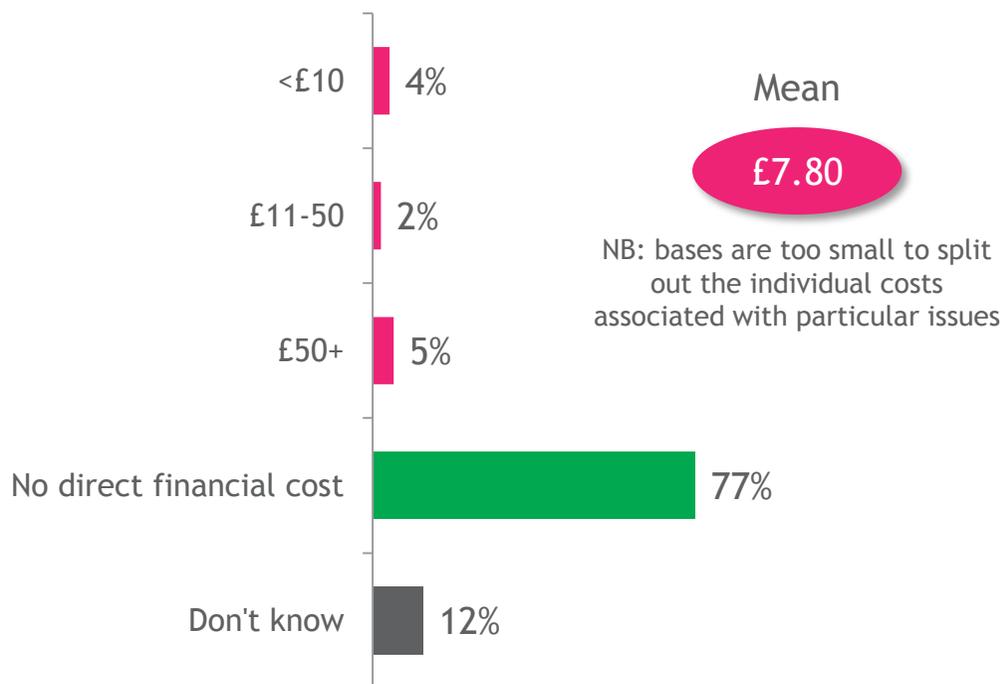
The majority of households experienced no direct financial costs as a result of their loss of service. Where they did face costs, these were an average of £7.80

Experience of loss of service

Household impacts (prompted)



Direct financial costs of these impacts



WAVE 1 E7 Which, if any, of the following would you say applied to your most recent loss of mobile service? Base: all with loss of mobile service n=113

E8 Thinking about the factors you mentioned, what were the direct financial costs to your household for all of the following because of your most recent loss of mobile service? Base: all mentioning specific* factors n=50*

E9 Overall what were the direct financial costs to you and your business/the people in your household because of your most recent service loss to? all not mentioning specific factors n=63*

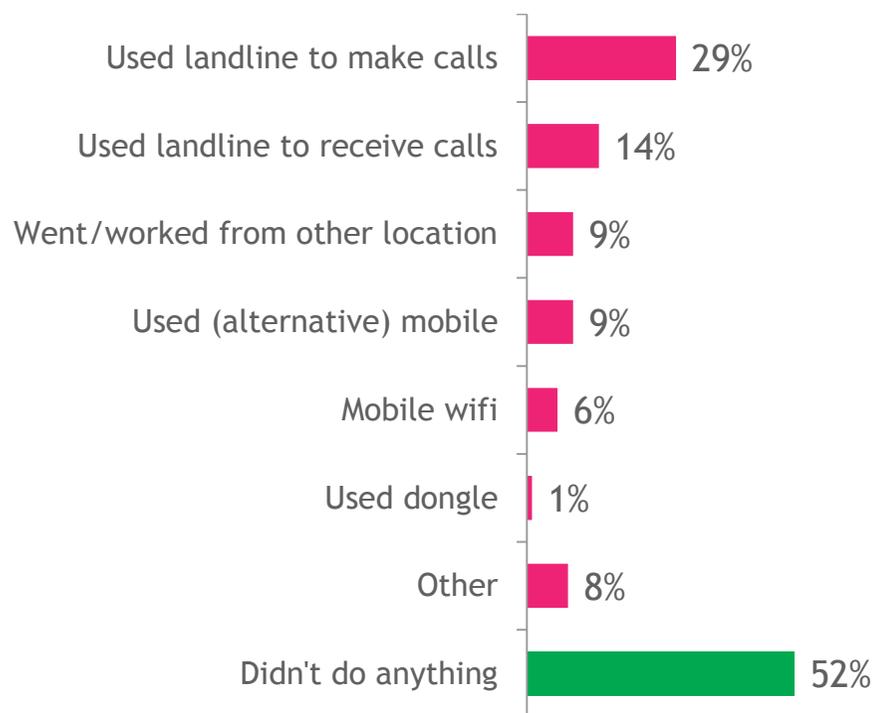
E11: Still thinking about the direct financial costs to you and the people in your household. If there were any other direct financial costs not included in the factors mentioned previously, could you please indicate the amount of these costs below? Base: all mentioning specific* factors n=50*

E8 / E9 / E11 Summary table - Base: all with loss of mobile service n=113. *CAUTION LOW BASE

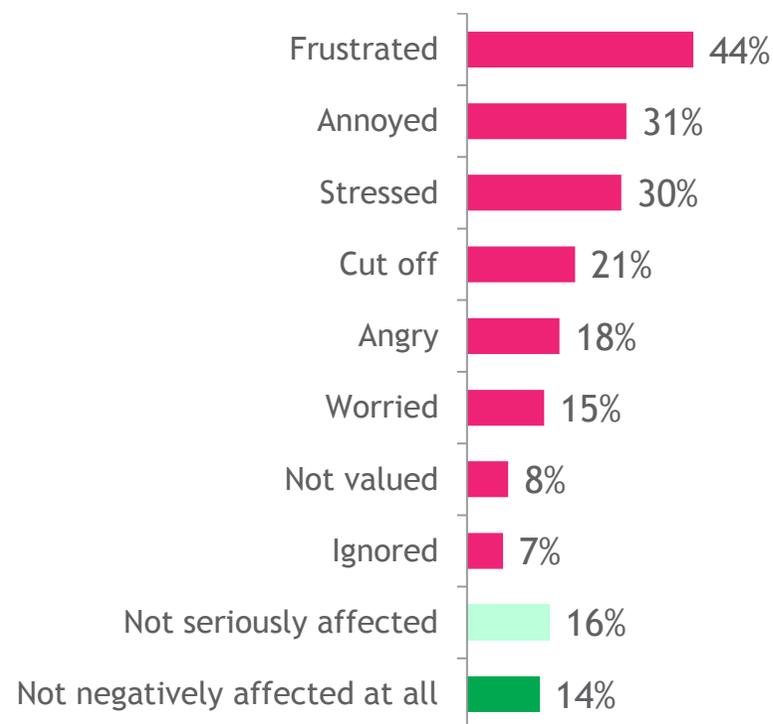
More than half didn't do anything to reduce the impact of their mobile service loss; using a landline to make/receive calls was the most likely action. Two-fifths felt frustrated by the loss of service. Annoyance and stress were outcomes for a third.

Experience of loss of mobile service

Actions taken to reduce impact



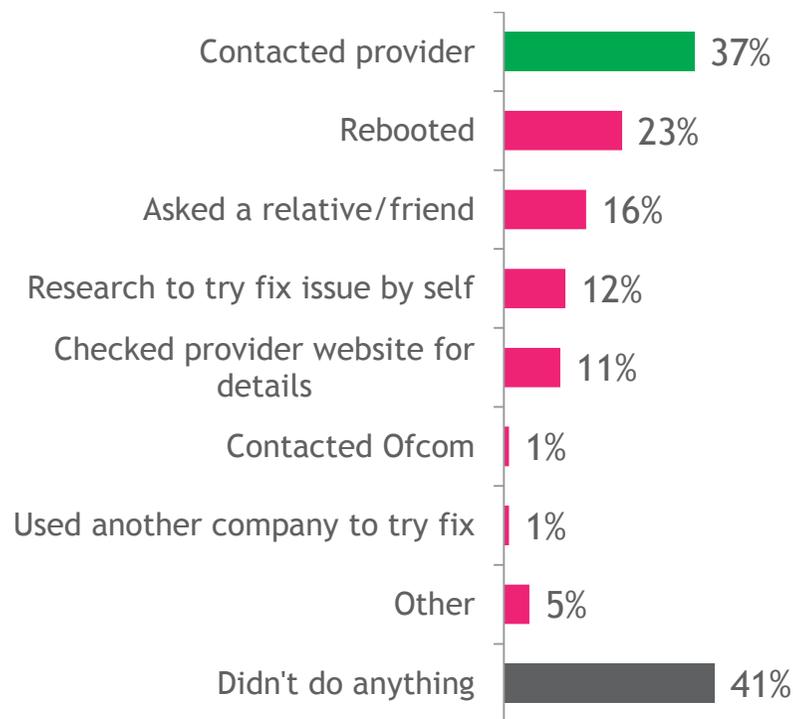
How loss of service made you feel



Over a third contacted their provider (most by phone) in an attempt to fix or restore service their service. Around a quarter resorted to rebooting their device.

Experience of loss of mobile service

Actions taken to fix/restore service



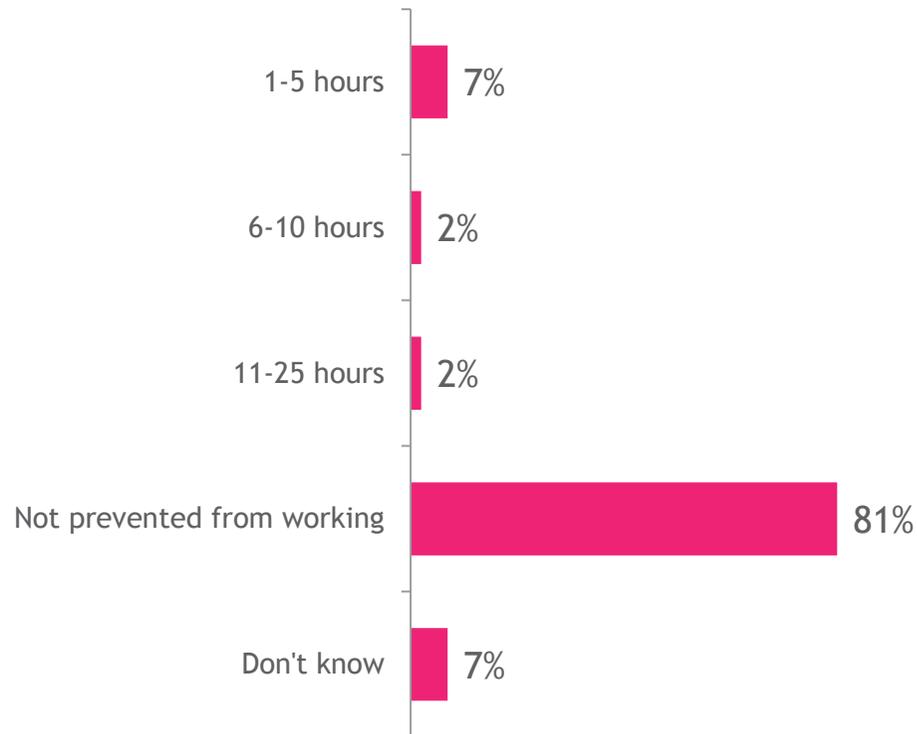
Detail of contact made

Of the 43 who contacted their provider, 32 did so via phone, 6 via email, 4 via webchat, 7 in another way

On the whole, four in five were not prevented from working as a result of their loss of mobile service

Experience of loss of mobile service

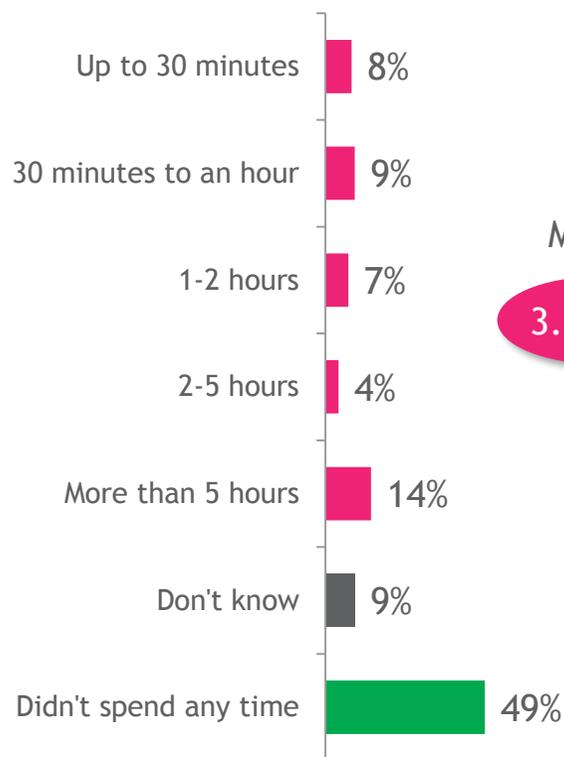
Prevented from working by loss of service (if use mobile for work)



On average people spent around 3 days trying to get their mobile service fixed, but around half spent no time at all. Very few had to wait in for an engineer visit

Experience of loss of mobile service

Time you/others spent trying to get service fixed

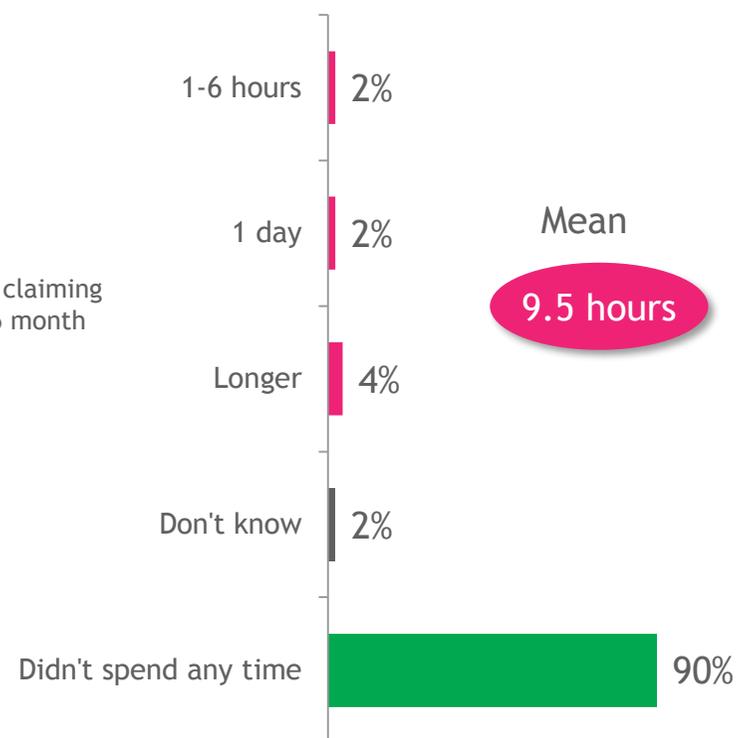


Mean

3.2 days

NB: This excludes the person claiming to spend 5,000 hours over a 6 month period

Time you/others spent waiting in for engineer visits



Mean

9.5 hours

WAVE 1 CONSUMER E12di How much time did you and other people in your household spend trying to get your mobile service fixed? Please think about all the things that you and others in your household spent time on to resolve the loss from the point at which the loss occurred until you had service again. This should include the time taken to contact your provider and any attempts to repair the service yourself. It should not include the time spent waiting for an engineer visit(s). E12dii And how much time, if any, did you and other people in your household spend waiting in for an engineer visit or visits? Base: all with mobile loss of service n=113.

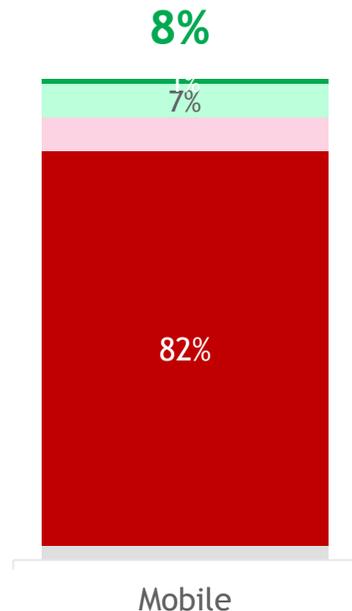
Fewer than one in ten received any compensation or temporary alternative services following the loss of mobile service

Experience of loss of mobile service

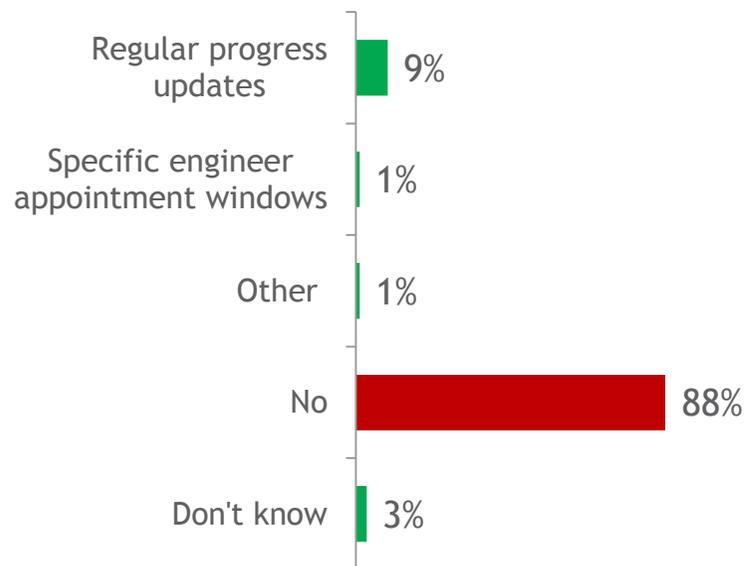
Received any compensation?

NET compensation received

- Asked & received
- Not asked but received
- Asked & NOT received
- NOT asked, NOT received
- Don't know



Did provider offer any temporary alternative services?

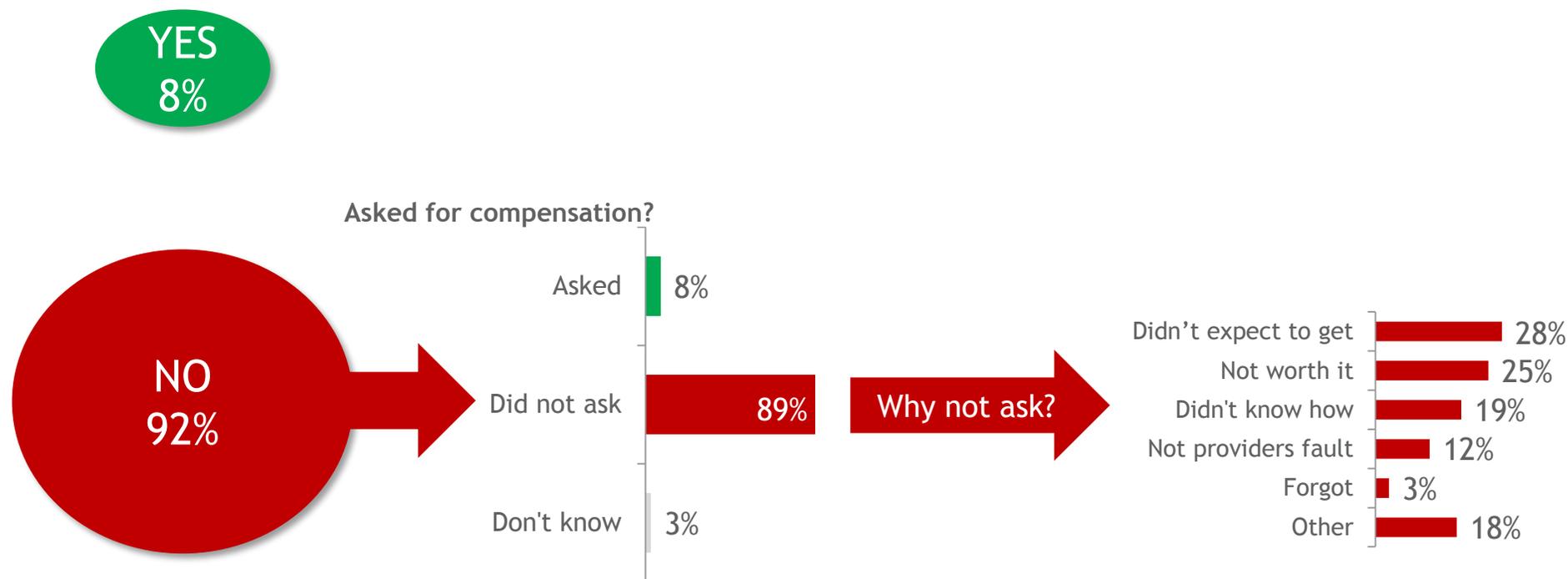


WAVE 1 CONSUMER: E19 Did you receive any compensation from your provider for this loss of service? Base: all mobile loss of service n=113 E20a/b Did you ask for compensation in regards to the loss of service or was it offered by your provider? Base: all mobile loss of service n=113 E28a Did your provider offer any temporary alternative services while your Mobile was/were out of service? What were they? Base: all loss of mobile service n=113

The vast majority neither asked for nor received compensation. Key rationale for not asking is that people don't expect to get it or feel it's not worth it

Experience of loss of mobile service

Received compensation for loss of mobile service?



Half wouldn't expect any compensation for mobile loss of service of this nature; for most this was because the outage was short-lived

Experience of loss of mobile service

Level of payment enough to compensate for impact



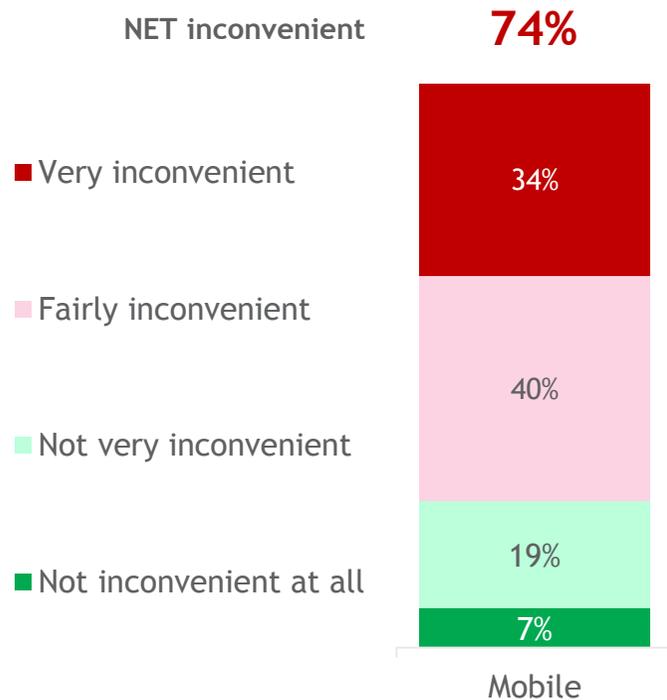
WAVE 1 CONSUMER E25c How much, if anything, would you expect to receive as compensation to completely make up for the loss of service you experienced?

Base: All who experienced mobile loss of service n=113

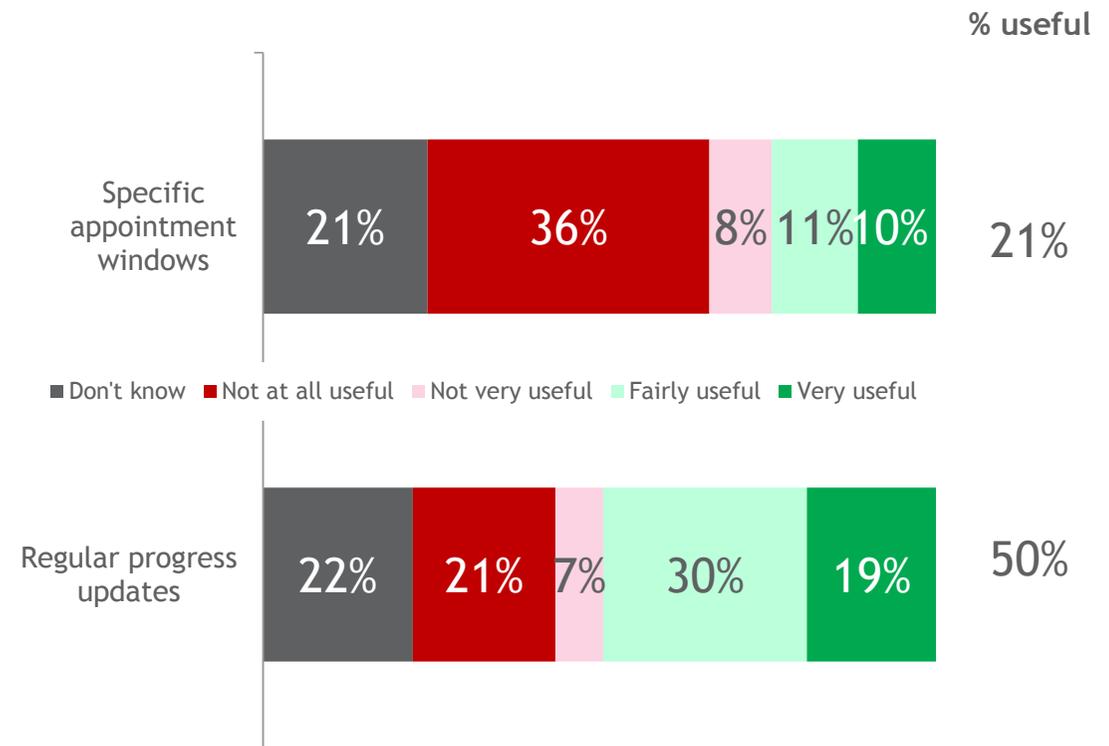
E26 Why would you not expect to receive any compensation? Base: all not expecting to receive n=57* *CAUTION LOW BASE

Three quarters would describe their loss of mobile service as inconvenient. Half feel that regular progress updates from providers would be useful during a future loss of service

Experience of loss of mobile service



Perceived usefulness of concepts during loss of service





Automatic compensation :
Consumer experience of provisioning delays, loss of
service and missed appointments

Mobile Service Research:
SMEs



Mobile research: SME executive summary (1)

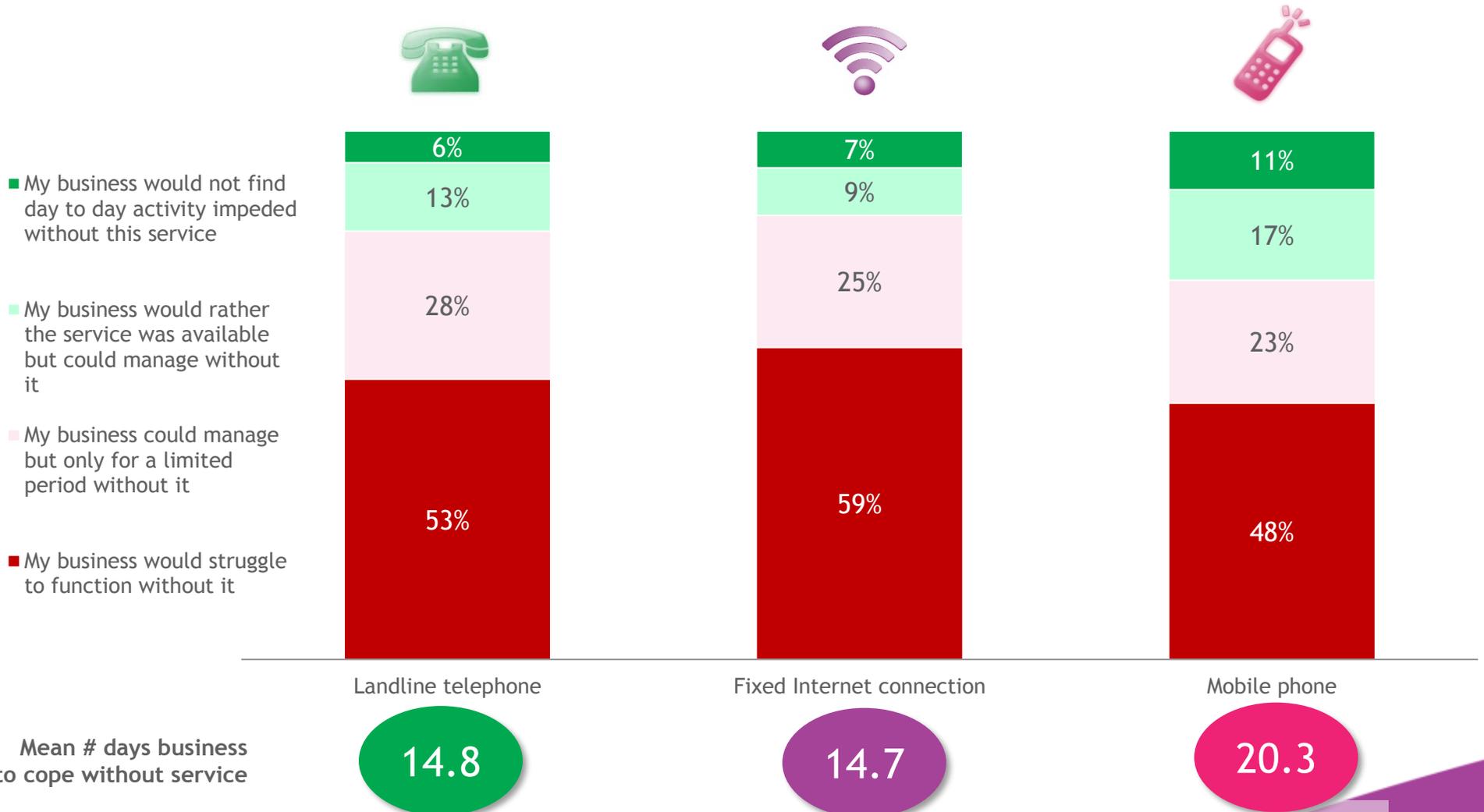
- ❑ Half (48%) feel business would struggle to cope without a mobile phone
- ❑ Price is the main factor affecting provider choice (47%). Larger SMEs (10+ employees) are less likely to cite this, and more likely to mention customer service (14%)
- ❑ 1 in 8 (12%) have experienced a loss of service in an area where they would normally get good coverage, in the past 12 months
 - Only a third (37%) reported this to their provider
 - On average, this LoS lasted for 4.3 days
 - 2 in 5 (41%) were satisfied with their providers ability to resolve the matter
- ❑ Loss of contactability (69%) was the key business impact, along with inability to receive enquiries (39%), time taken to resolve (38%) and the need to use of different location (33%)
- ❑ 63% of SMEs experienced no direct financial costs, whilst 22% were unsure. Of the 16% that experience additional costs, the average cost was c£380
- ❑ The LoS prevented people working in 14% of businesses. On average, 3 hours were lost across these businesses
- ❑ Half (47%) did nothing to reduce the impact of their LoS. 41% used their landline to make calls and 35% used it to receive calls
 - 47% felt frustrated by the LoS, 17% were angry and 16% annoyed

Mobile research: SME executive summary (2)

- ❑ **73% tried to restore their mobile service**, with 40% contacting their provider or rebooting their device. 24% checked the provider website for updates
- ❑ **On average, SMEs spent 3½ hours trying to get their mobile service fixed**, but half spend no time at all
- ❑ **Only 8% received compensation for their LoS**, with no SME asking for it. Of those that did not receive compensation, 3% asked for it and 97% did not
- ❑ **31% of SMEs expect to be compensated for the impact of their LoS**. On average, they expect c90 - to be paid as a credit on their account or cash
- ❑ **More than half (55%) describe their loss of mobile service as ‘very or fairly inconvenient’**
- ❑ **Two thirds (63%) feel that regular progress updates from providers would be useful during a future loss of service**

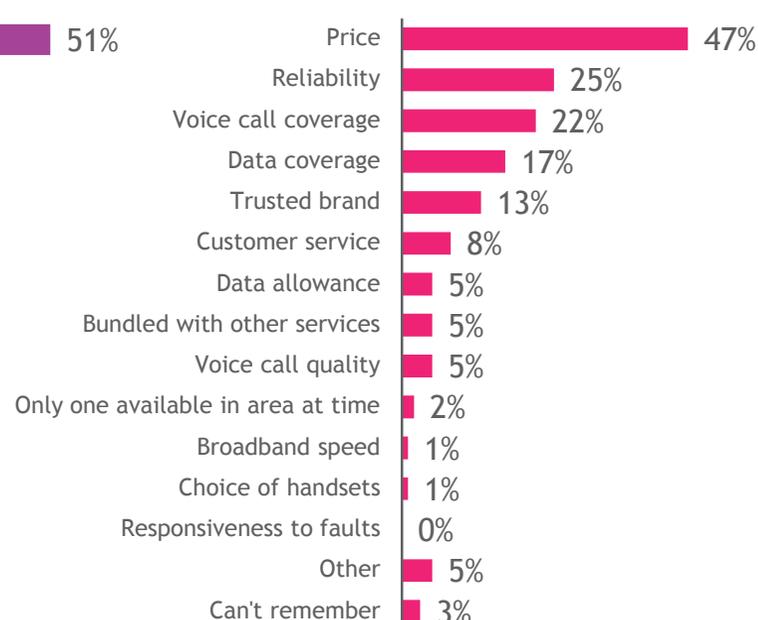
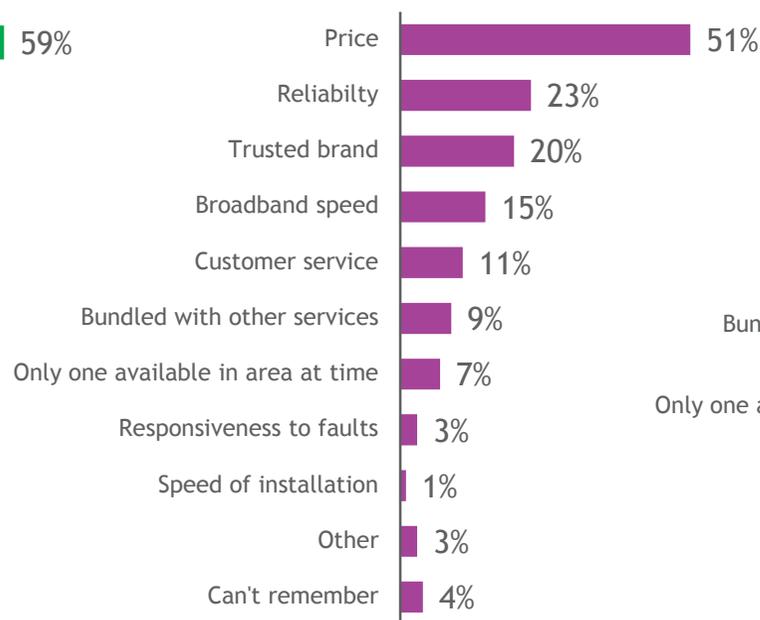
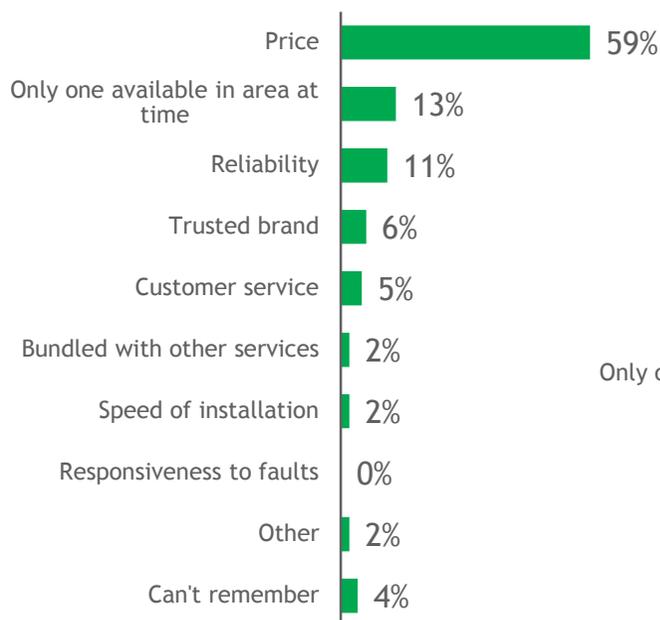
Around half feel business would struggle to cope without a mobile phone

Importance of telecoms services currently used



Price dominates as the influencing factor in provider choice. Larger SMEs (10+ employees) are less likely to cite this, and more likely to cite mobile customer service (14%)

Main factors that influenced choice of provider (unprompted)



- Only 39% of 10+ SMEs cite price vs. 52% of 1-9
- 24% of 10+ SMEs cite broadband speed vs. only 15% of 1-9

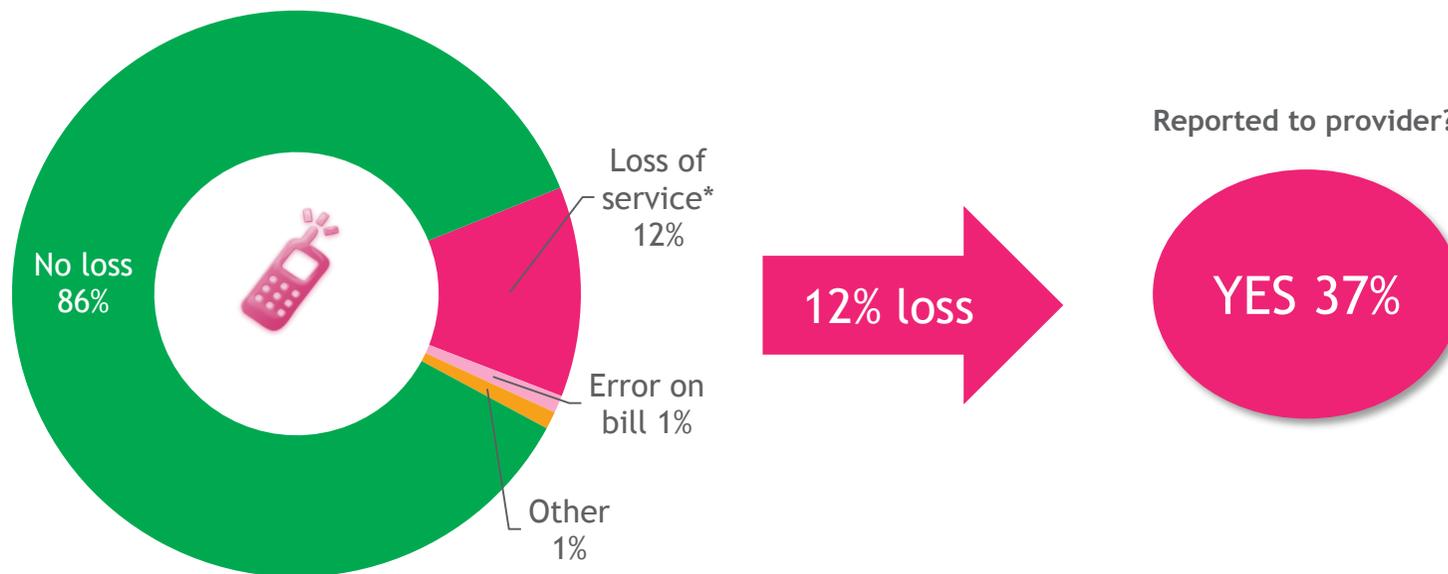
- 14% of 10+ SMEs cite customer service vs. only 8% of 1-9s

SME: C2a/b/c. Thinking back to when you chose your (service), what were the main factors that influenced your choice of provider?

Base: All that have a landline but no fixed broadband and changed their provider in the last 10 years n=72, all that have a fixed broadband connection and changed their provider in the last 10 years n=635, all with a mobile service n=577

12% of SME mobile users have experienced loss of service in an area where they would normally get good coverage. Over a third reported this to their provider.

Experienced loss of voice and/or data services on mobile phone?



COMBO SME: E2a Over the last 12 months, have you experienced any of the following in relation to your mobile phone? Base: All who use a mobile n=868

*Loss of service in an area where you would normally get good coverage, for more than 1 hour. E2b Did you report your mobile phone loss of service to your provider?

Base: all mobile loss of service n=122



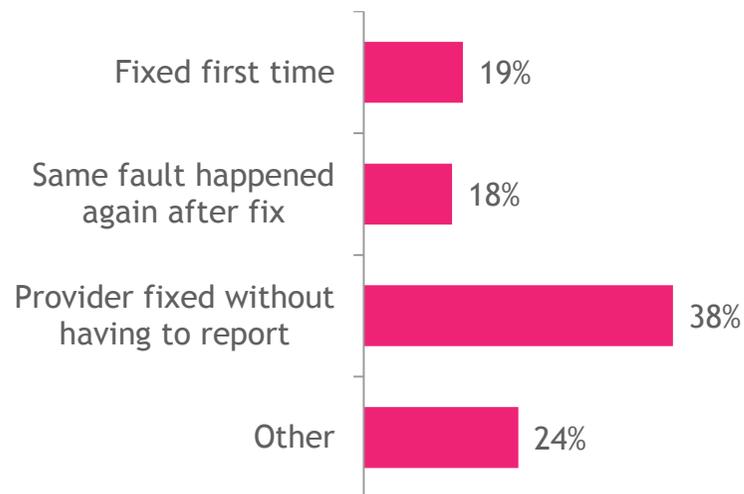
In more than a third of cases the loss was fixed without a report to the provider; a fifth of cases remained unresolved and for a fifth the same fault reoccurred following the fix

Experience of loss of mobile service

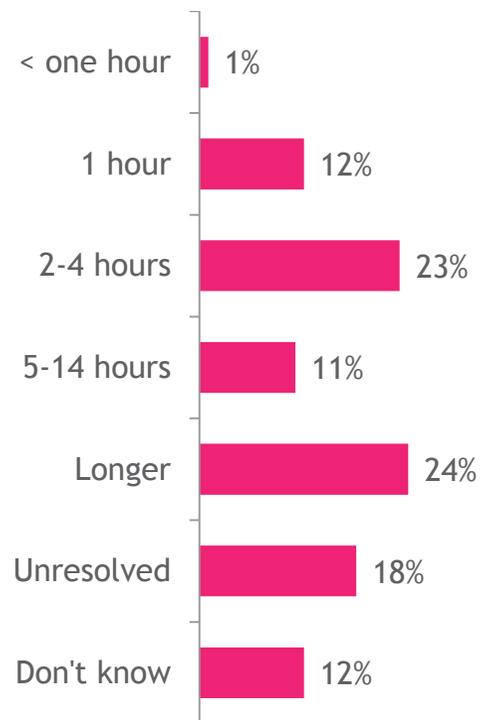
Reported to provider?



What happened following loss of mobile service?



How long initially took to restore mobile service to normal?



Mean: 4.3 days

Overall two-fifths are satisfied but a third are dissatisfied with their provider's ability to resolve their mobile loss of service (larger SMEs more polarised)

Experience of loss of mobile service

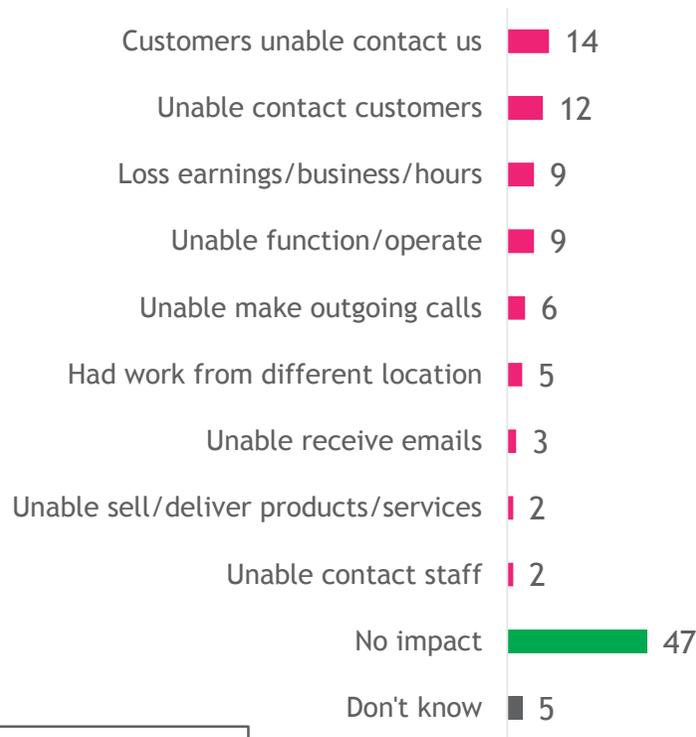
Satisfaction with provider ability to resolve loss of service



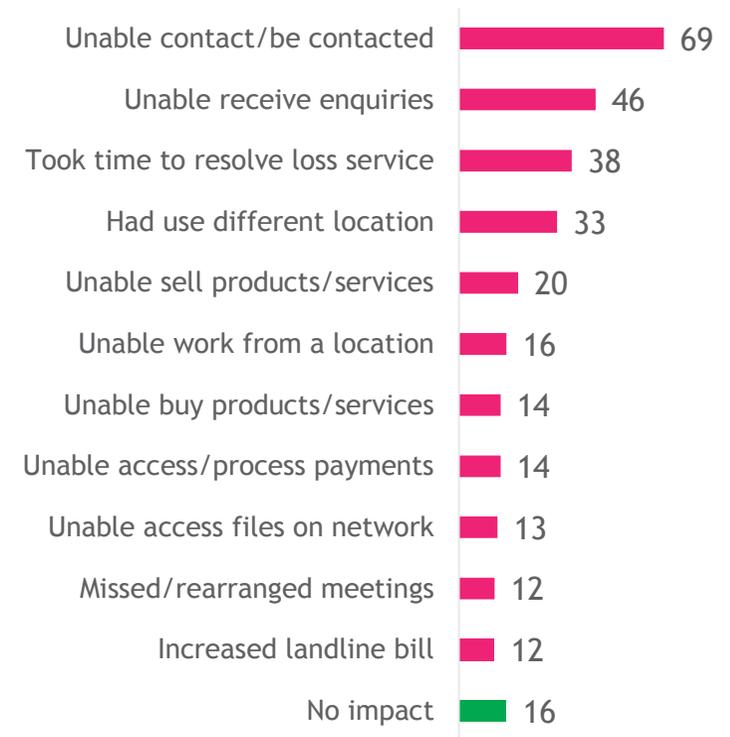
Loss of contactability to/from customers was the key business impact

Experience of loss of service

Business impacts (unprompted)



Business impacts (prompted)

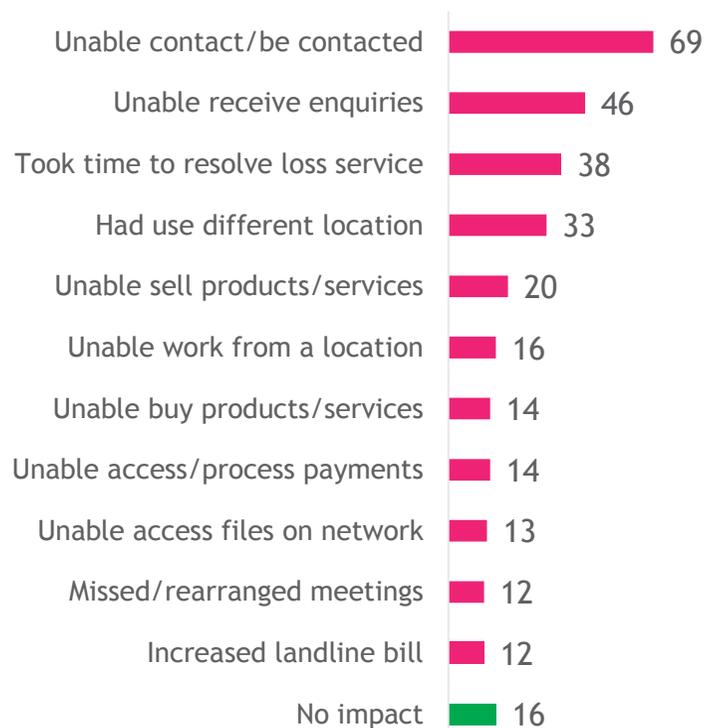


NB: Sample for 10-249 employees only 31 so can't be shown

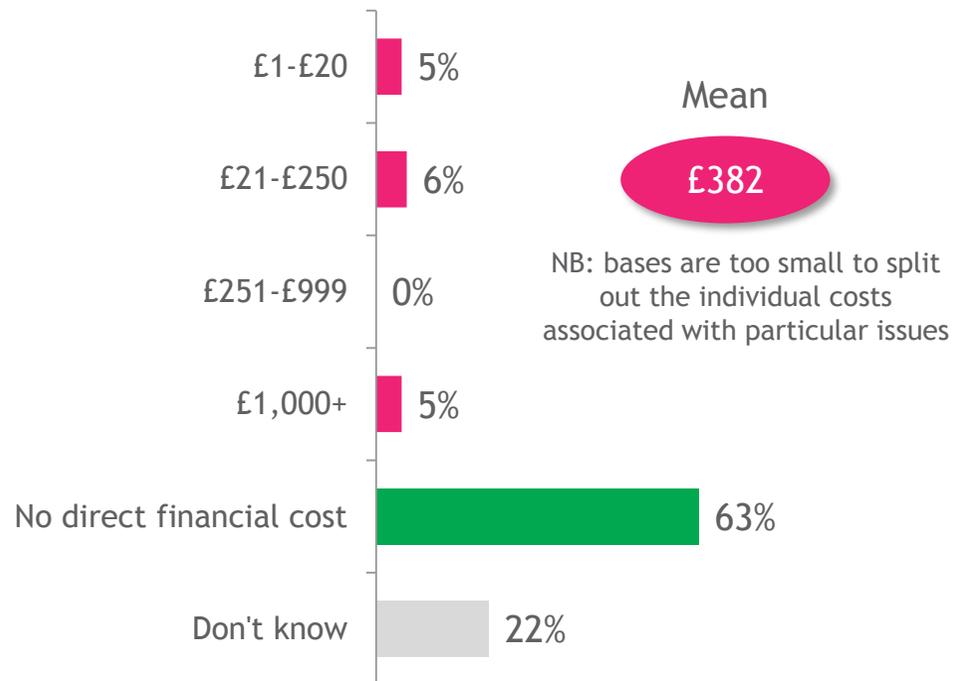
The majority of SMEs experienced no direct financial costs as a result of their loss of service. Where they did face costs, these were an average of £382

Experience of loss of service

Business impacts (prompted)



Direct financial costs of these actions*



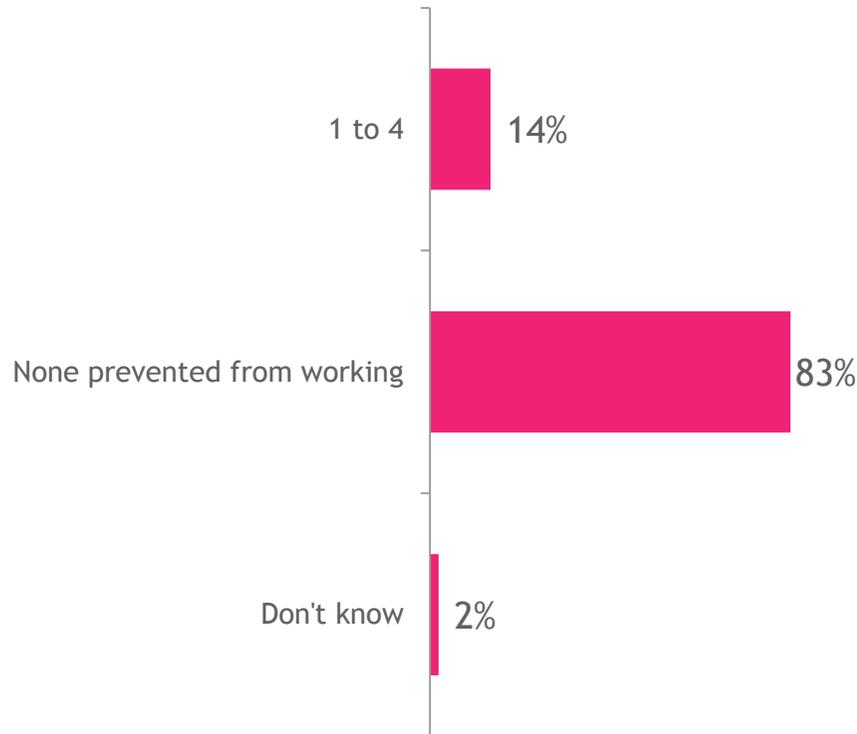
SME E7 Which, if any, of the following would you say applied to your most recent loss of mobile service? Base: all with loss of mobile service n=90*

E8 Thinking about the factors you mentioned, what were the direct financial costs to your business for all of the following because of your most recent loss of mobile service? Still thinking about the direct financial costs to your business. If there were any other direct financial costs not included in the factors mentioned previously, could you please indicate the amount of these costs below? Base: all with loss of mobile service n=90* *CAUTION LOW BASE

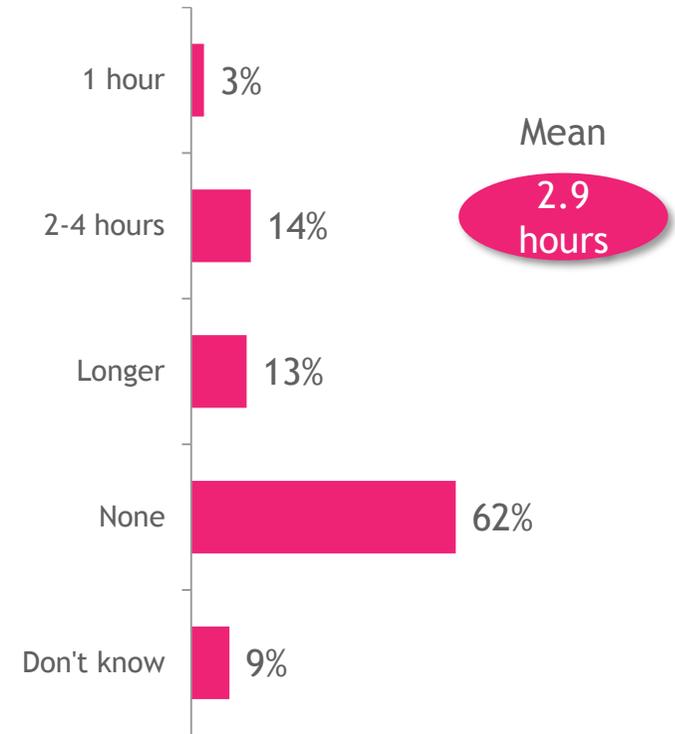
The loss of service prevented staff in 1 in 7 SMEs from working, however, number of hours lost was relatively low

Experience of loss of mobile service

People prevented from working by loss of service



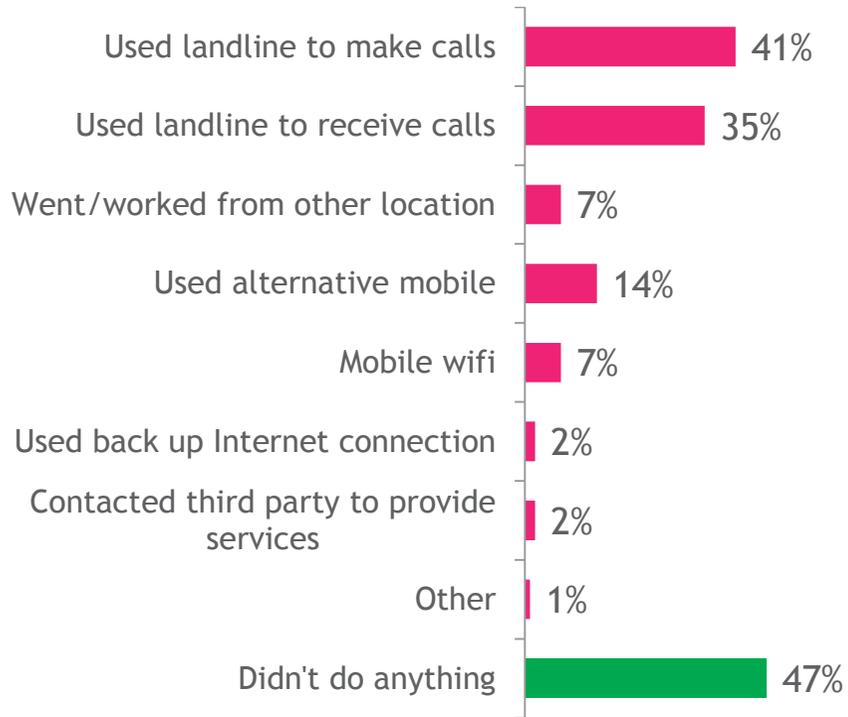
Working hours lost as result of loss mobile service



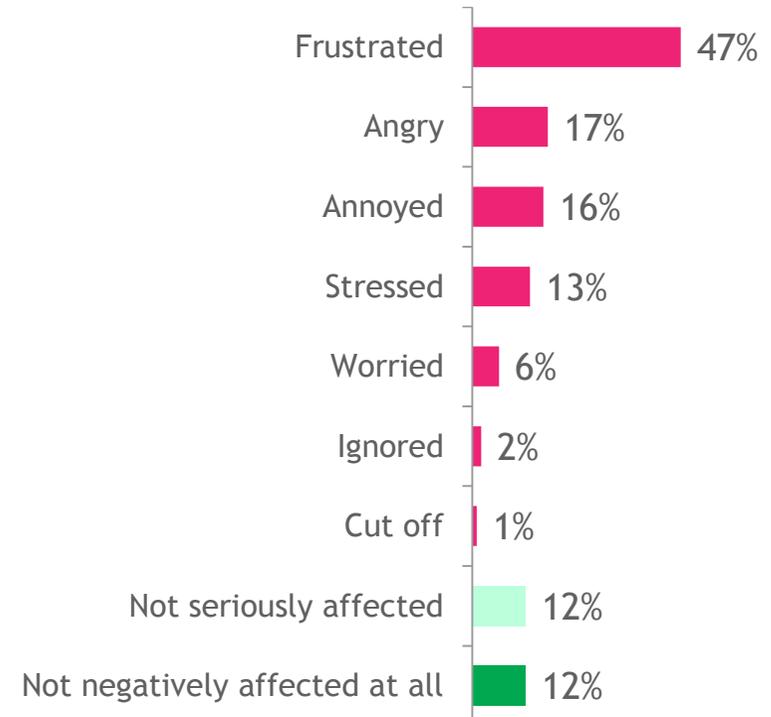
Most likely action to reduce the impact was to use landline for calls. Almost half say the loss of mobile service left them feeling frustrated

Experience of loss of mobile service

Actions taken to reduce impact



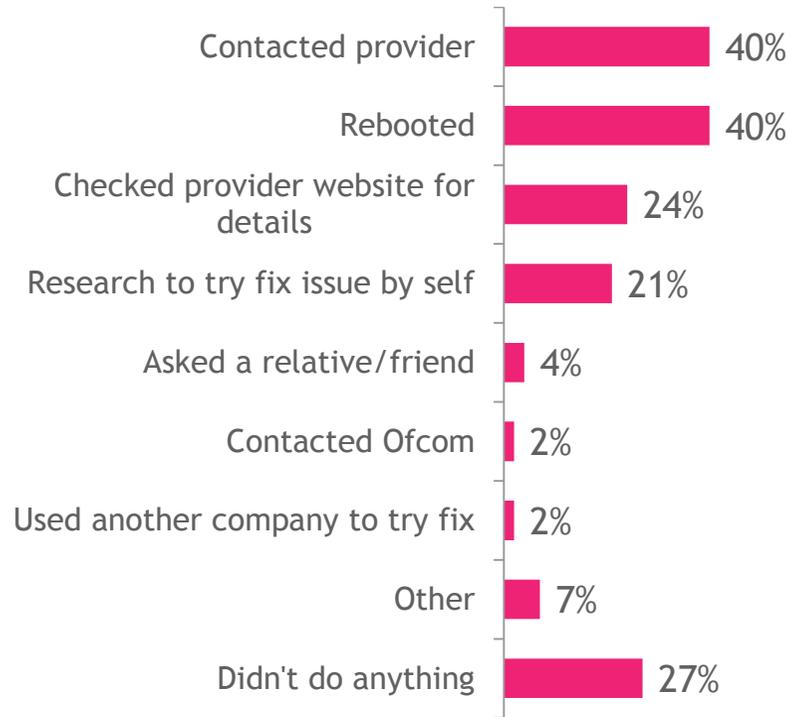
How loss of service made you feel



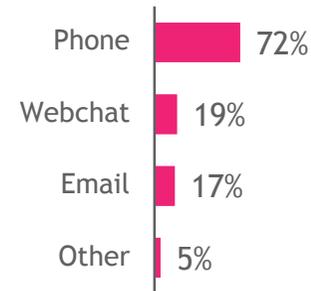
Two fifths contacted their provider or rebooted - and a further quarter checked their provider website for details. Contact was mainly via telephone (72%), although 1 in 5 (19%) used webchat or email (17%).

Experience of loss of mobile service

Actions taken to fix/restore service



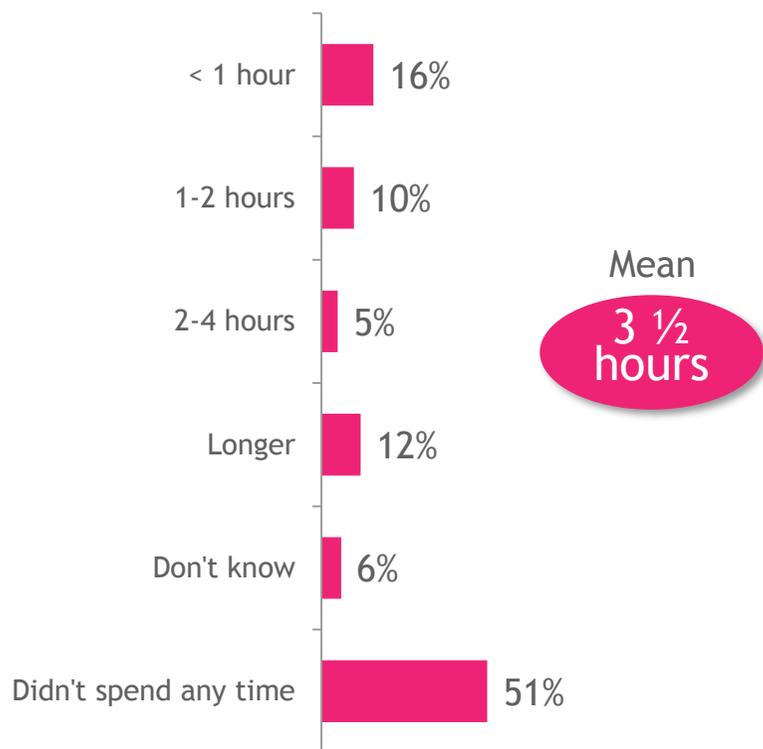
Detail of contact made



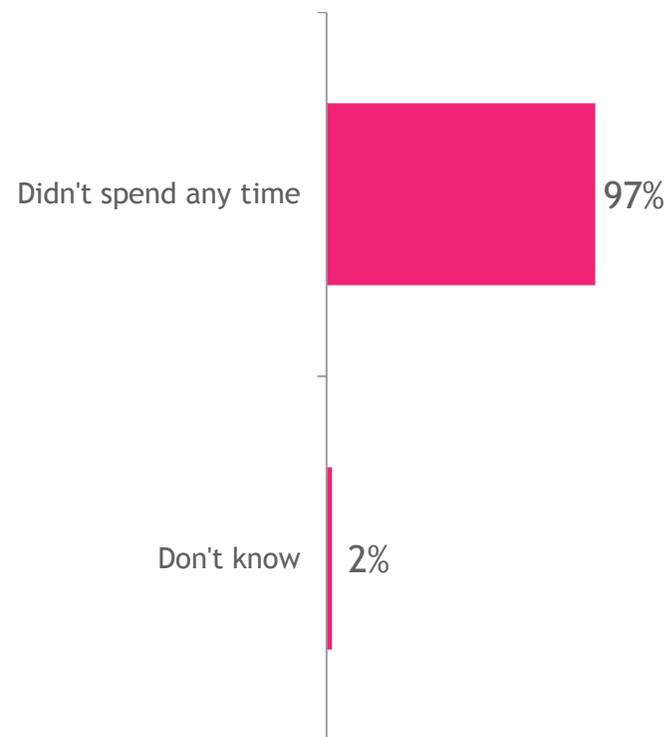
More than half spent no time trying to get their mobile service fixed and no one spent time waited in for an engineer

Experience of loss of mobile service

Time you/others spent trying to get service fixed



Time you/others spent waiting in for engineer visits



E12di How much time did you and other people in your business spend trying to get your mobile service fixed? Please think about all the things that you and others in your business spent time on to resolve the loss from the point at which the loss occurred until you had service again. This should include the time taken to contact your provider and any attempts to repair the service yourself. It should not include the time spent waiting for an engineer visit(s). E12dii And how much time, if any, did you and other people in your business spend waiting in for an engineer visit or visits? Base: All answering on mobile loss of service n=90*
*CAUTION LOW BASE

Fewer than one in ten received any compensation

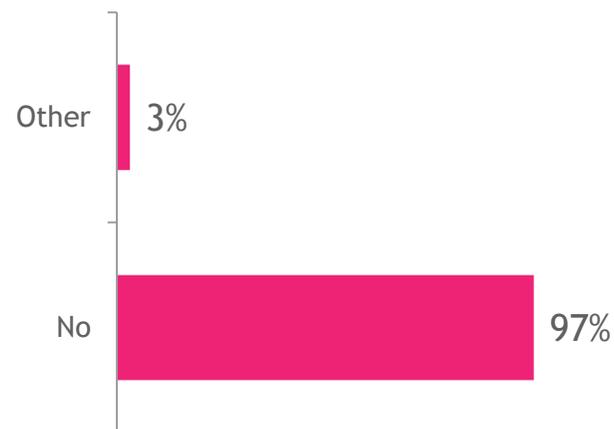
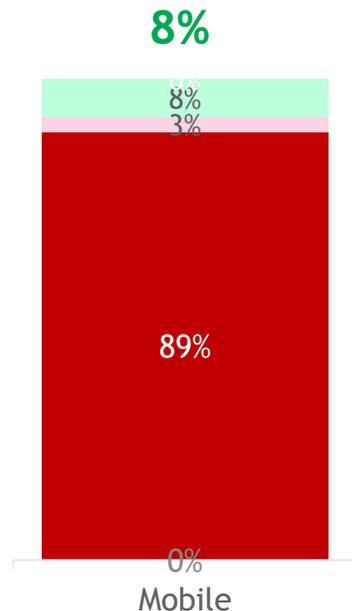
Experience of loss of mobile service

Received any compensation?

Did provider offer any temporary alternative services?

NET compensation received

- Asked & received
- Not asked but received
- Asked & NOT received
- NOT asked, NOT received
- Don't know



SME: E19 Did you receive any compensation from your provider for this loss of service? E20a/b Did you ask for compensation in regards to the loss of service or was it offered by your provider? Base: all answering on mobile loss of service n=90*

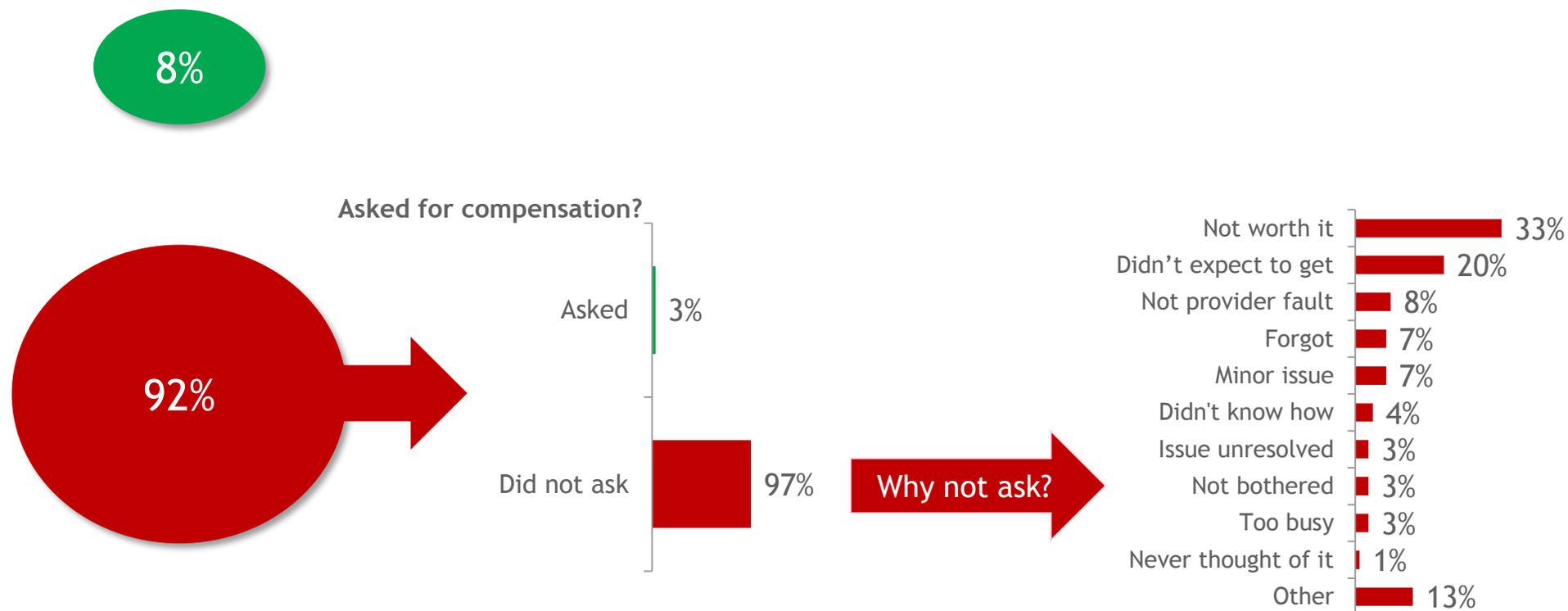
E28a Did your provider offer any temporary alternative services while your Mobile was/were out of service? What were they? Base: all loss of mobile service n=90*

*CAUTION LOW BASE

The vast majority neither asked for nor received compensation. Key rationale for not asking is that people feel it's not worth it or they don't expect to get it

Experience of loss of mobile service

Received compensation for loss of mobile service?



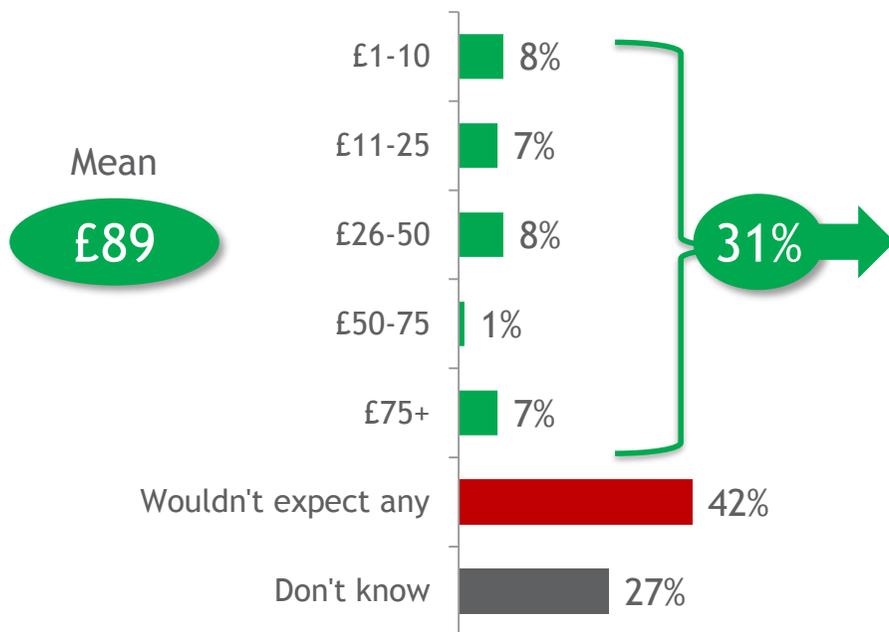
SME: E19 Did you receive any compensation from your provider for this loss of service? E20a/b Did you ask for compensation in regards to the loss of service or was it offered by your provider? Base: all answering on mobile loss of service n=90*

E21 Why did you not ask for compensation? Base: all who didn't ask for compensation n=82* *CAUTION LOW BASE

After probing, a third expect some form of compensation for a loss of mobile service.

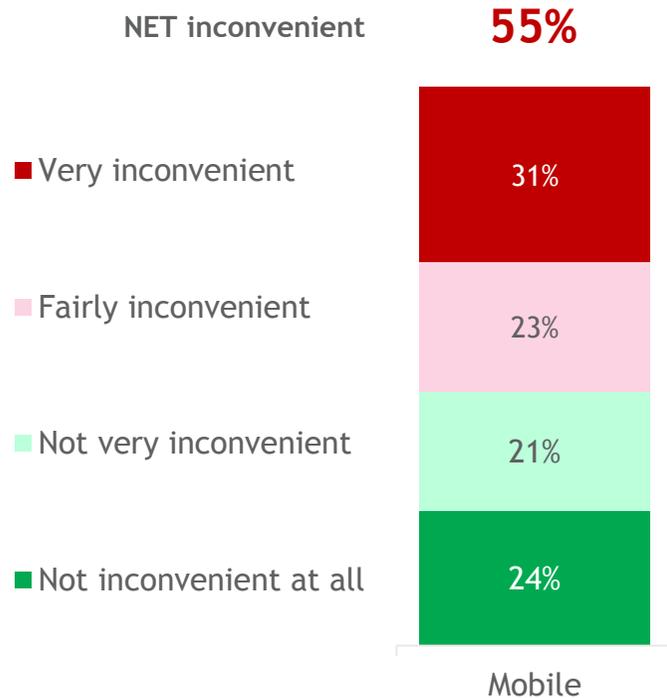
Experience of loss of mobile service

Level of payment enough to compensate for impact

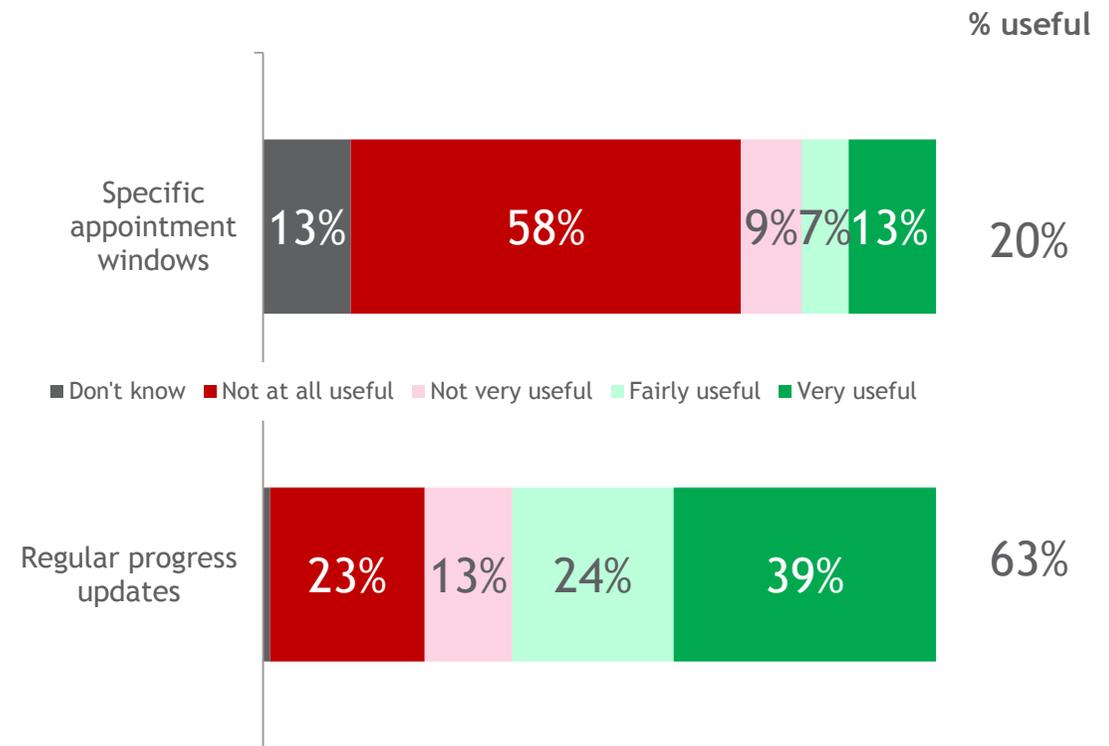


More than half found their loss of mobile service to be inconvenient. More than 6 in 10 would find regular progress updates useful.

Experience of loss of mobile service



Perceived usefulness of concepts during loss of service



SME E18b Which of the following best describes the impact of the loss of mobile service on your business? E29 To what extent would the following have been useful to you during your loss of service?

Base: all answering on mobile loss of service n=90* *CAUTION LOW BASE

Automatic compensation :

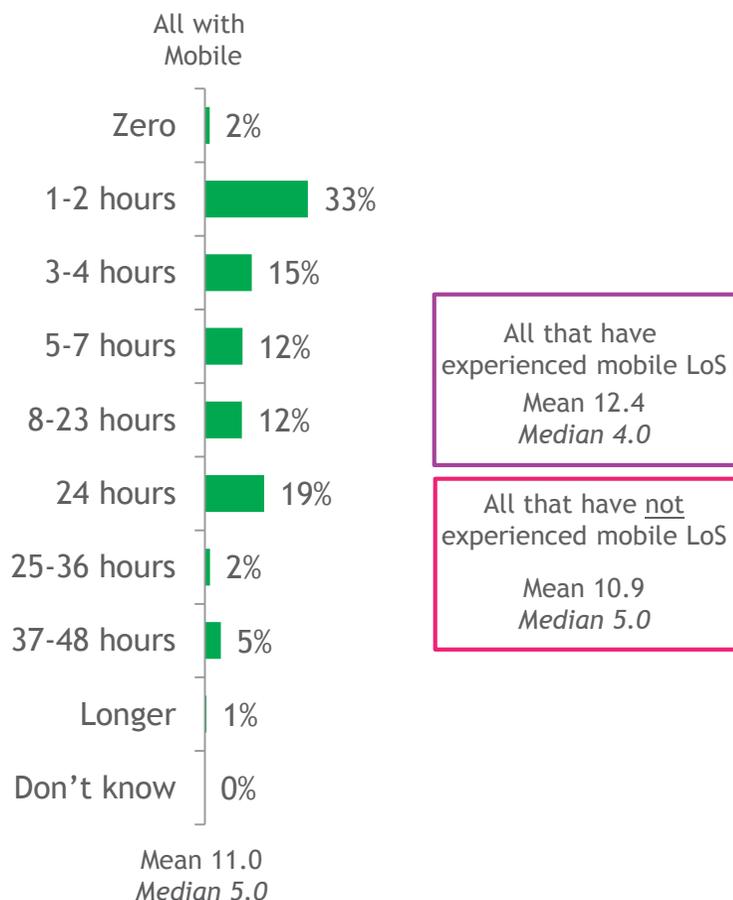
Minimum standards & willingness to pay more/less for better/worse service: Consumers & SMEs



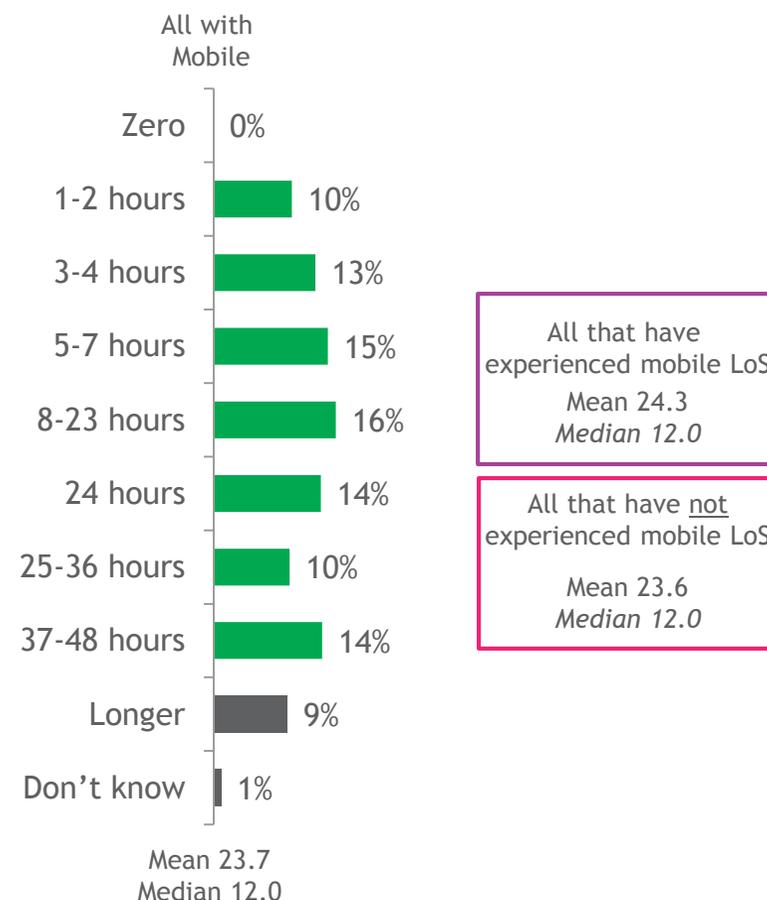
11 hours is considered the maximum reasonable wait time for a fault to be fixed on a mobile service. Around a day (23.7 hours) is considered to be unacceptable

CONSUMERS: Loss of service on mobile phone service

Acceptable wait time for loss of service (hours)



Unacceptable wait time for loss of service (hours)

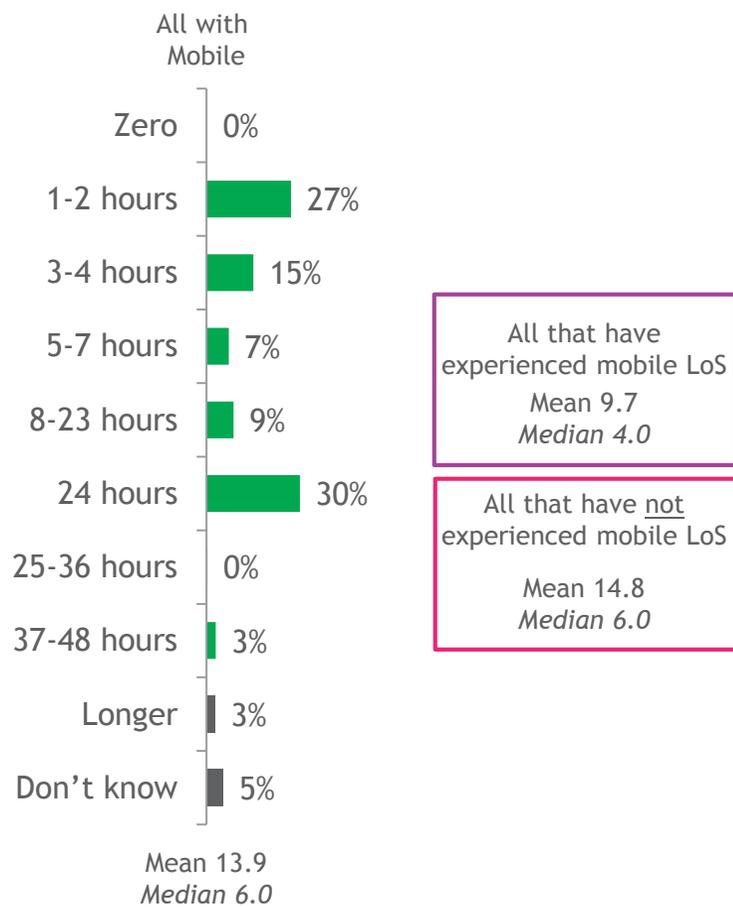


C10 Please think back to when you experienced a loss of service for your mobile phone service. How long do you think it is reasonable for the maximum wait until your provider has successfully resolved the fault? 'Reasonable' does not have to mean your 'ideal' situation, but one that would be generally satisfactory to you. Please give your answer in terms of hours C11 And what would be an *unacceptable* length of time to wait? Again, please give your answer in terms of hours mobile loss of service n=1872 / experienced loss of mobile service n=137 / hypothetical loss of mobile phone n=1735

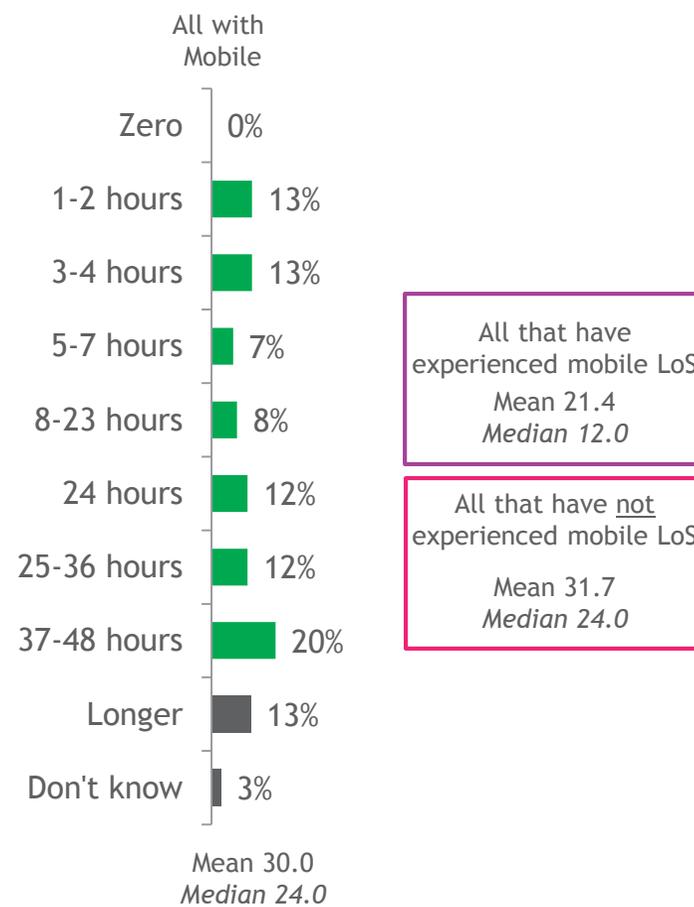
14 hours is considered the maximum reasonable wait time for a fault to be fixed on a mobile service. 30 hours is considered to be unacceptable

SMEs: Loss of service on mobile phone service

Acceptable wait time for loss of service (hours)



Unacceptable wait time for loss of service (hours)



C10 Please think back to when you experienced a loss of service for your mobile phone service. How long do you think it is reasonable for the maximum wait until your provider has successfully resolved the fault? 'Reasonable' does not have to mean your 'ideal' situation, but one that would be generally satisfactory to you. Please give your answer in terms of hours C11 And what would be an *unacceptable* length of time to wait? Again, please give your answer in terms of hours mobile loss of service n=639 / experienced loss of mobile service n=101 / hypothetical loss of mobile phone n=538



Extra analysis

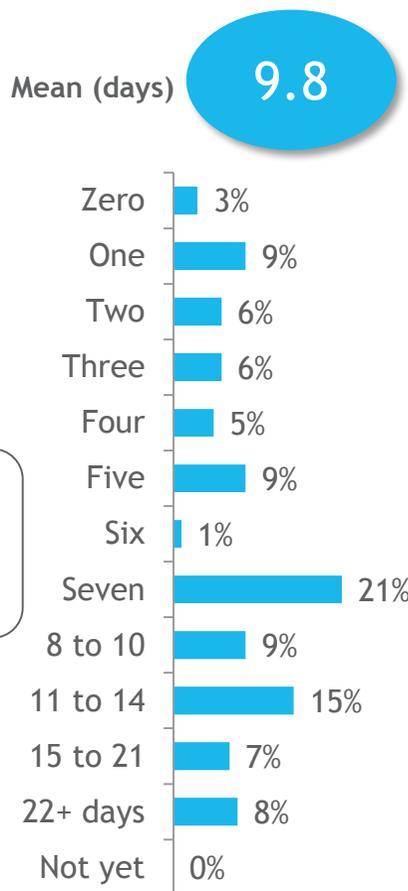
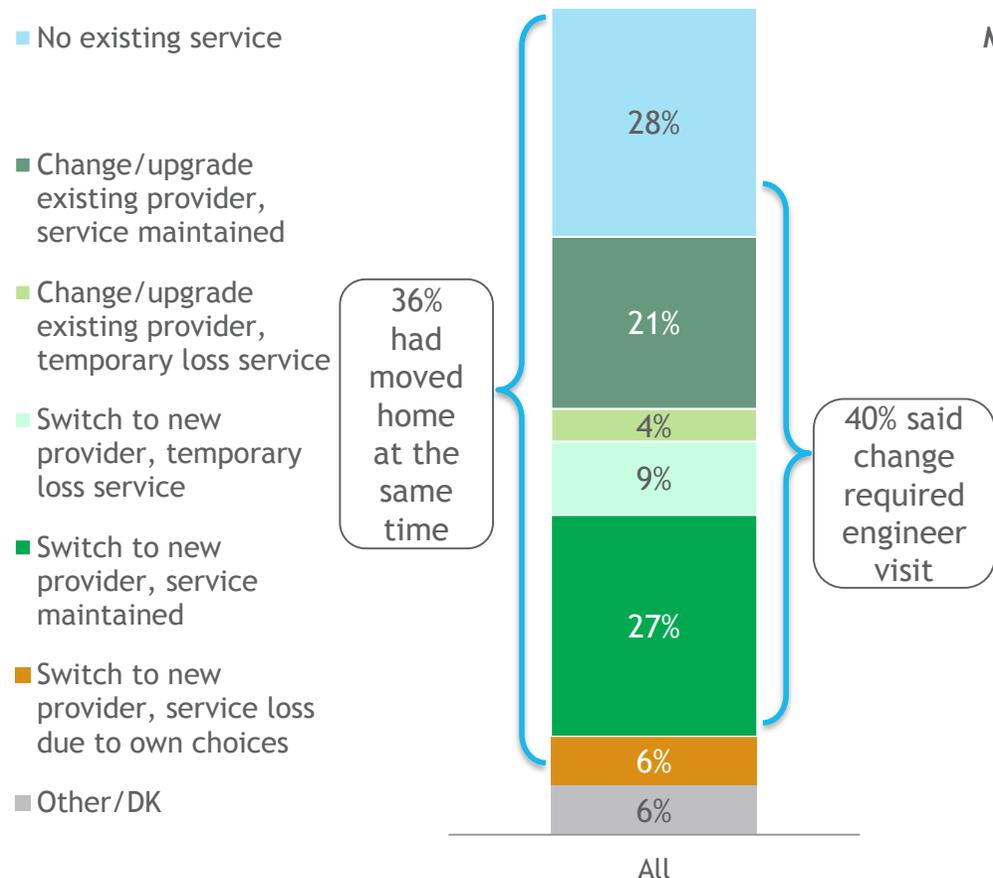
Fixed Line Research:
Consumers



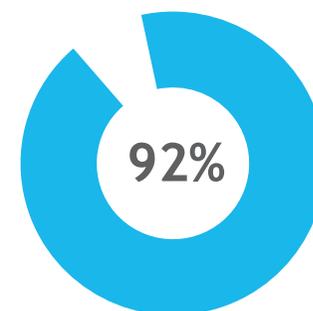
On average 9.8 days to service activation for any service. 92% said this was in line with provider information and 87% felt the time taken was reasonable.

Scenario last time changed or upgraded service (any service)

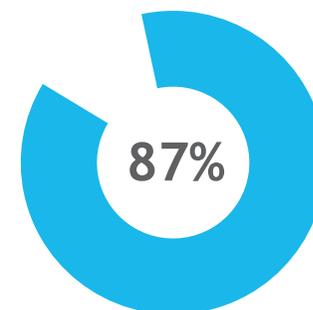
Service activation/upgrade (days)



In line with time period given by provider?



Reasonable timing?

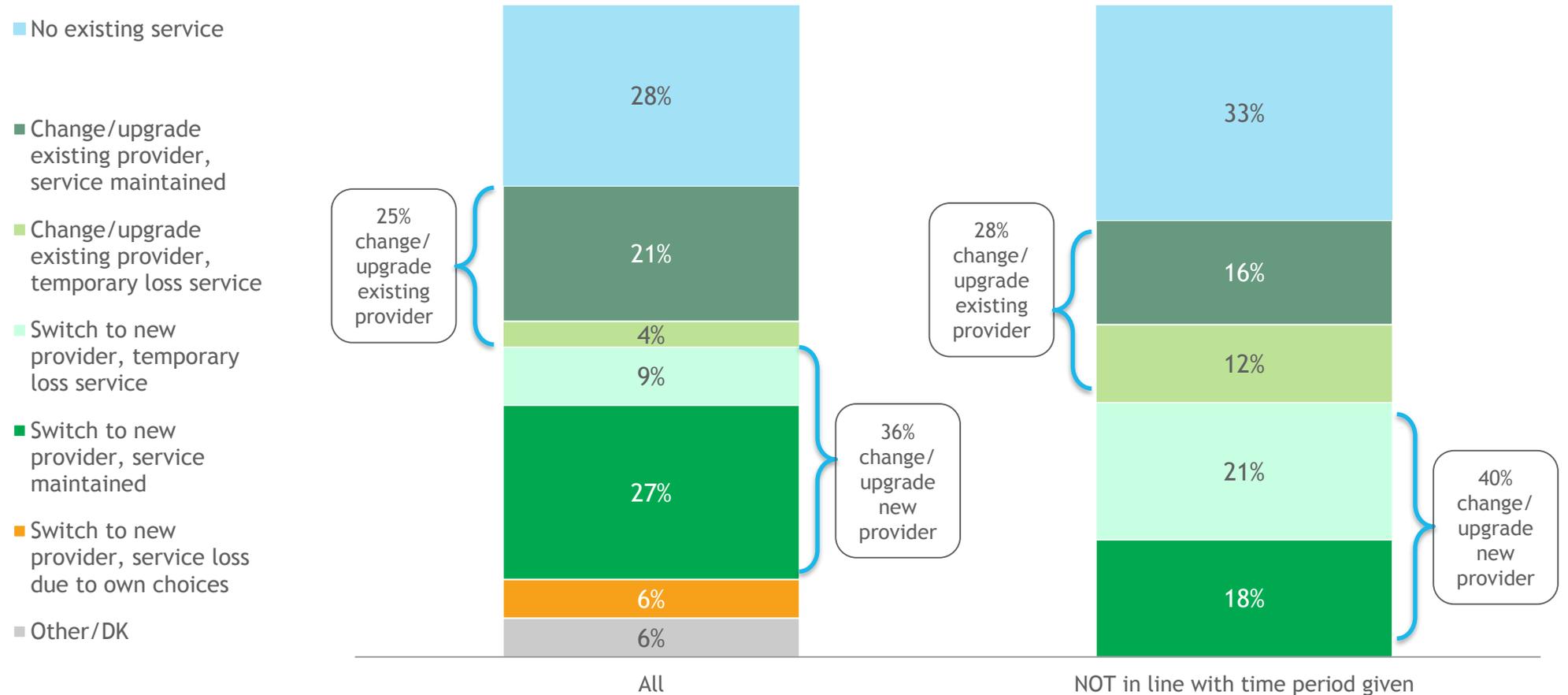


Of those who said no, the mean for a reasonable time was 5.2 days

E2 Which of these scenarios applied to the last time you changed or upgraded your service? Base: All Consumer that have changed (any service) in the last 5 years n=856 E3 Did you move home at the same time? Base: All not 'other/dk' at E2 n=808. E4 Did the change or upgrade require an engineer to visit your home to install new lines or other equipment? Base: All not 'no existing service' 'service loss due to own choices' or 'other/dk' at E2 n=522. E5 Approximately how many calendar days after placing the order was the service activated or upgraded? Base: all that had a new service n=758 (not including other/dk or those without service due to own choices at E2). E5b And was this in line with the time period you had been given by your provider? E6a Do you think the time it took was reasonable? Base: All where service activated n=522

Overall, a quarter (28%) did not have an existing service at their property, a quarter (25%) changed or upgraded with their existing provider and a third (36%) switched to a new provider.

Scenario last time changed or upgraded service (any service)



E2 Which of these scenarios applied to the last time you changed or upgraded your service? Base: All that have changed (any service) in the last 5 years n=856; All where service activation/upgrade was NOT in line with the time period given by their provider (excluding those who say service loss to own choice or DK at E2 which is why those codes then don't appear) n=101