





Customer satisfaction research

Fieldwork: July - August 2016

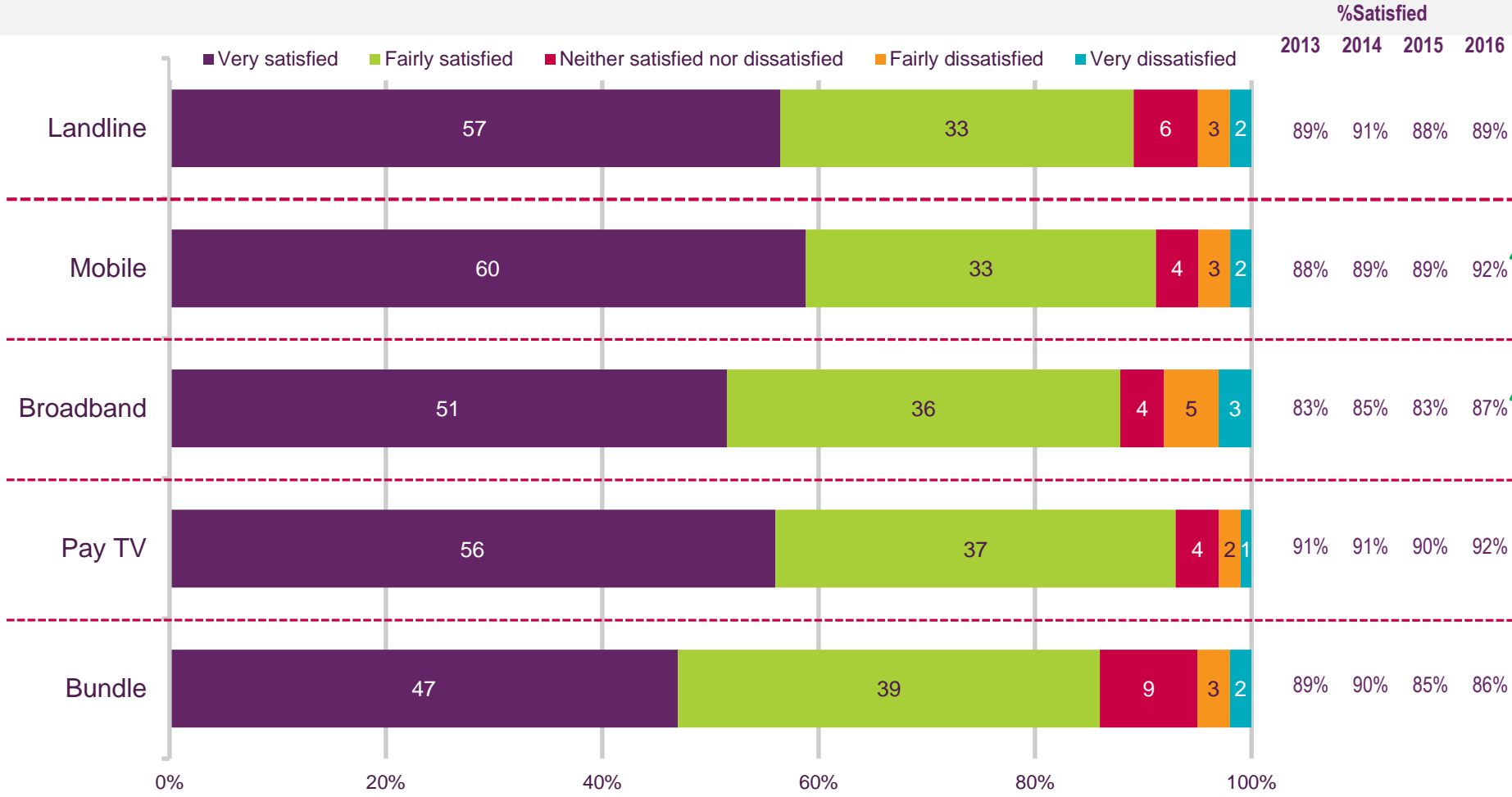
Background and methodology

Background and methodology

- The Switching Tracker is Ofcom's key data source on switching levels, attitudes and experiences across the communications markets (landline, mobile, fixed broadband and multi-channel/Pay TV). Since 2007 Ofcom has run this tracking study among UK adults (decision makers in each market) to measure participation levels, switching incidence and ease of switching, as well as satisfaction levels in each market.
- We have moved from RDD telephone interviewing (2014 and prior), through an interim year (2015) where interviewing was split to achieve half by telephone and half face-to-face, to conduct all of the interviewing in 2016 face-to-face (2576 interviews).
- Fieldwork took place in July – August 2016. Questions are asked up front to establish household ownership of landline, fixed broadband, TV service and mobile phone. For each service, the questionnaire established whether the respondent is the decision maker. Questions of the decision maker also established whether any of the household's services are in a bundle or package from the same supplier.
- On completion of the interviews, weighting is applied for each section (i.e. each of the above markets) of the survey using profiles from our Communications Tracking Survey.
- Throughout the chart pack  indicates significant decrease,  indicates significant increase at 99% confidence level, compared to 2015 and  indicates a significantly lower score,  indicates a significantly higher score at 99% confidence level compared to the total market.
- The data tables can be found at: https://www.ofcom.org.uk/data/assets/pdf_file/0025/95524/Switching-Tracker-2016-Data-tables.pdf

Since 2015 there has been an increase in overall satisfaction in the mobile and broadband markets.

Satisfaction with overall services from communications provider - total market



Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2016

QL5/QM5/QI5/QT5/QB5. In terms of your (SERVICE)... How satisfied are you with the OVERALL SERVICE PROVIDED by (PROVIDER)? Would you say you are...

Base: All adults aged 16+ who are the decision-maker and express an opinion on fixed line (2016, 1716), mobile (2016, 2262), fixed broadband (2016, 1528), pay TV (2016, 1085), any bundle (2016, 1312). 'Don't know' responses have been excluded from the base.



BT customers have higher overall satisfaction than landline customers as a whole (89%⁴ vs 92%)

Satisfaction with overall services, by landline provider - total market



Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2016

QL5. In terms of your landline service... How satisfied are you with the OVERALL SERVICE PROVIDED by (PROVIDER)

Base: All adults aged 16+ who are the decision-maker and express an opinion on fixed line (1716), receiving their service from BT (664), Sky (381), Virgin Media (334), TalkTalk (170). Providers used by fewer than 100 respondents are not shown individually but are included in the total. 'Don't know' responses have been excluded from the base.



Tesco Mobile customers have higher overall satisfaction than mobile customers as a whole (96% vs 92%)

Satisfaction with overall services, by mobile provider - total market



Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2016

QM5. In terms of your mobile phone service... How satisfied are you with the OVERALL SERVICE PROVIDED by (PROVIDER)? Would you say you are...

Base: All adults aged 16+ who are the decision-maker and express an opinion on mobile (2262), receiving their service from EE (577), O2 (555), Vodafone (315), 3 (225), Virgin (150), Tesco (140). Providers used by fewer than 100 respondents are not shown individually but are included in the total. 'Don't know' responses have been excluded from the base.



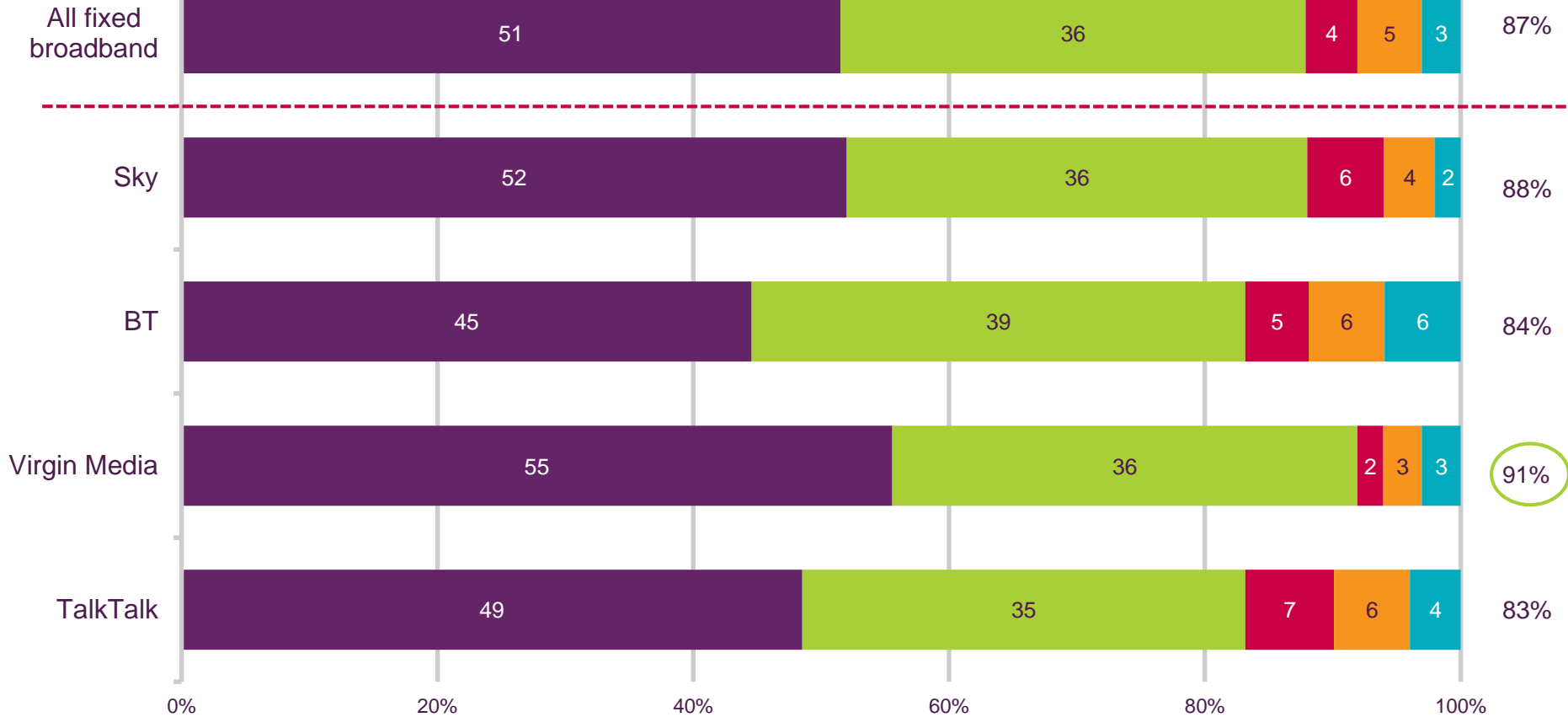
Virgin Media customers have higher overall satisfaction with their fixed broadband than fixed broadband customers as a whole (91% vs 87%)

Satisfaction with overall services, by fixed broadband provider - total market



Very satisfied
Fairly satisfied
Neither satisfied nor dissatisfied
Fairly dissatisfied
Very dissatisfied

%Satisfied
2016



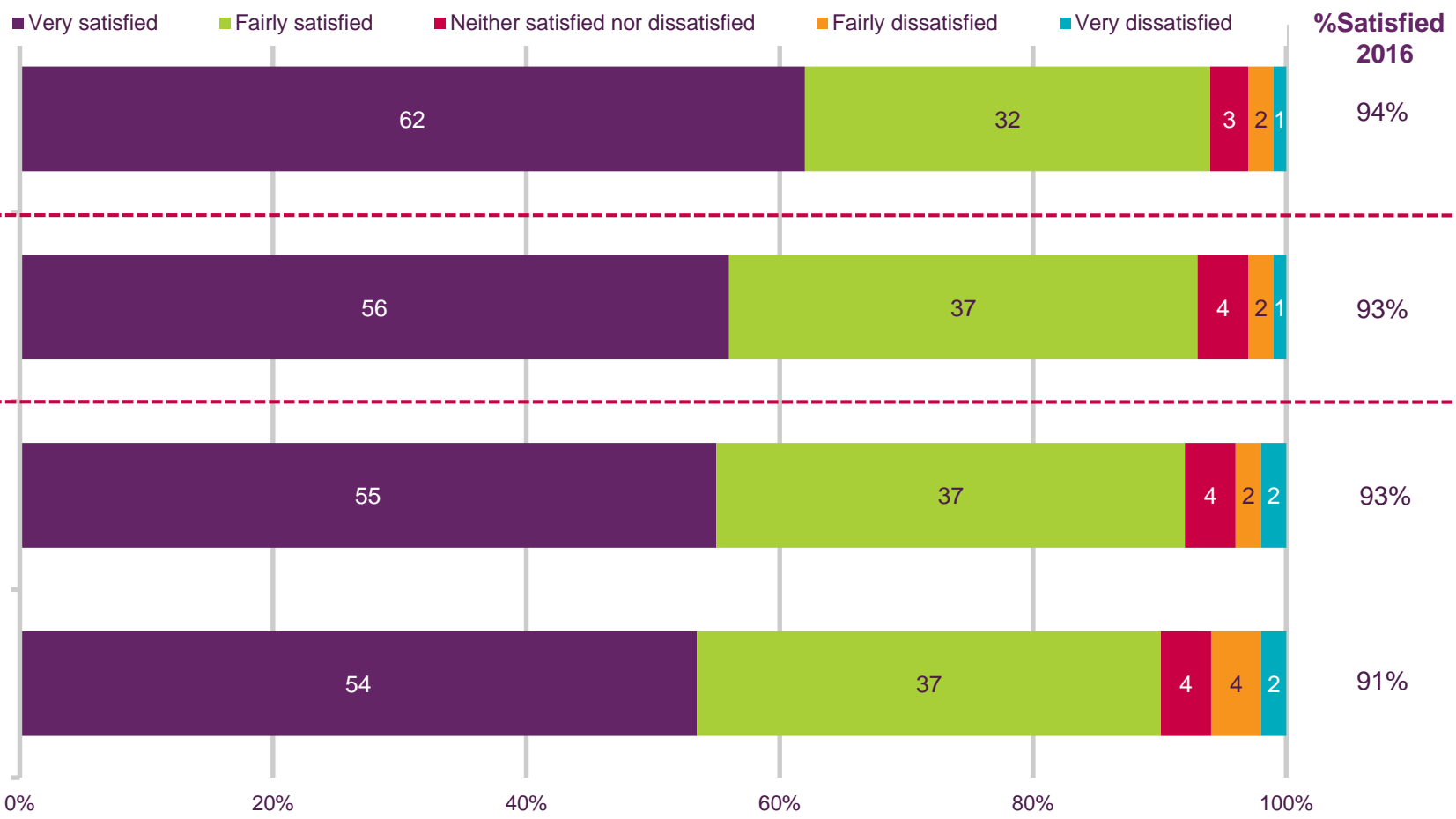
Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2016

Q15. In terms of your fixed broadband service... How satisfied are you with the OVERALL SERVICE PROVIDED by (PROVIDER)? Would you say you are...

Base: All adults aged 16+ who are the decision-maker and express an opinion on fixed broadband (1528), receiving their service from Sky (415), BT (404), Virgin Media (356), TalkTalk (171). Providers used by fewer than 100 respondents are not shown individually but are included in the total. 'Don't know' responses have been excluded from the base.

About nine out of ten pay TV and digital TV customers were satisfied with their overall service, with no significant difference between Sky and Virgin Media customers

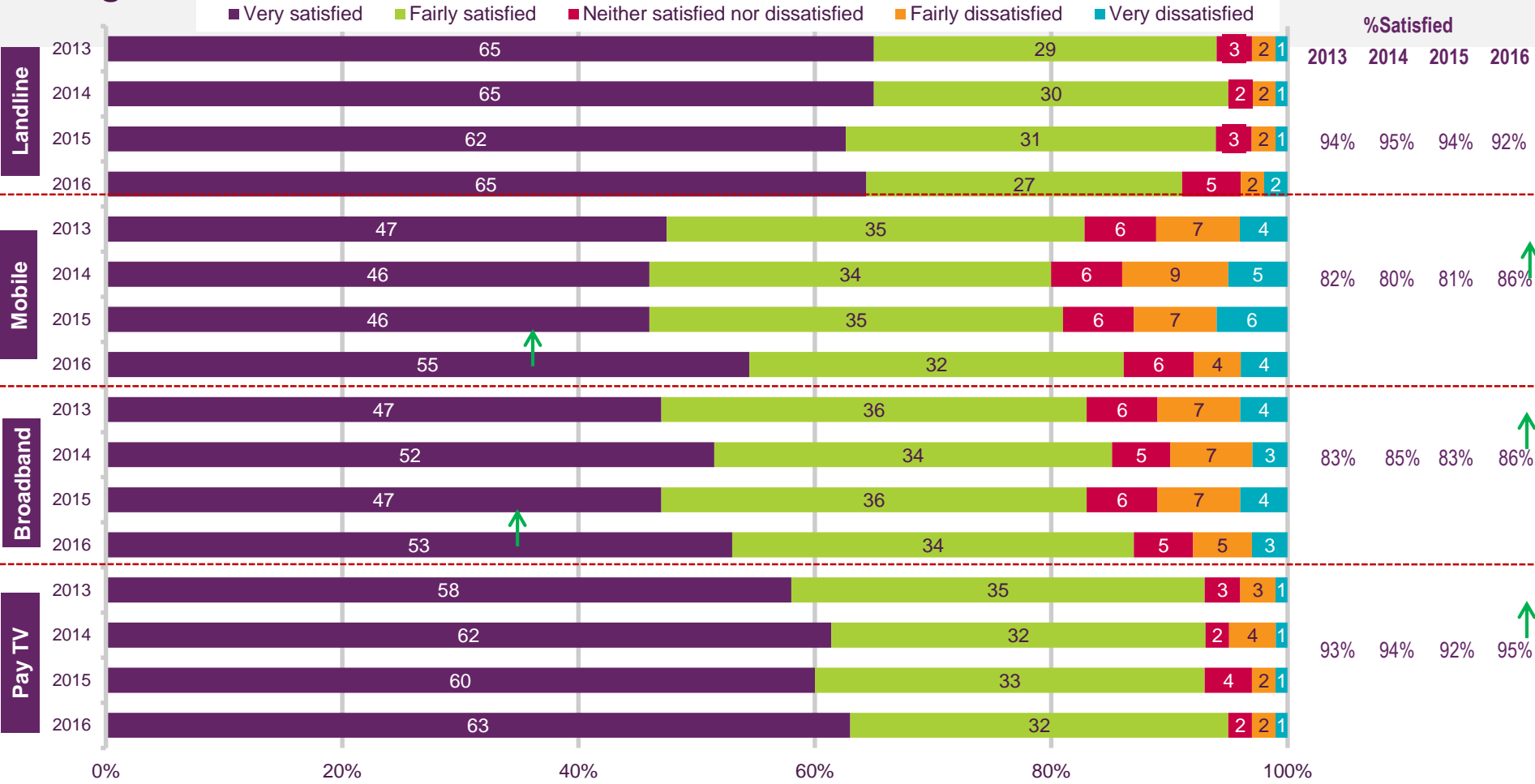
Satisfaction with overall services, by Pay TV provider - total market



Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2016
 QT5. In terms of your television service... How satisfied are you with the OVERALL SERVICE PROVIDED by (PROVIDER)? Would you say you are...
 Base: All adults aged 16+ who are the decision-maker and express an opinion on Digital TV (1850) Pay TV (1085), receiving their service from Sky (635), Virgin Media (304). Providers used by fewer than 100 respondents are not shown individually but are included in the total. 'Don't know' responses have been excluded from the base.

Satisfaction with reliability remains highest in the pay TV and landline markets, despite increases in satisfaction among mobile, fixed broadband and pay TV customers

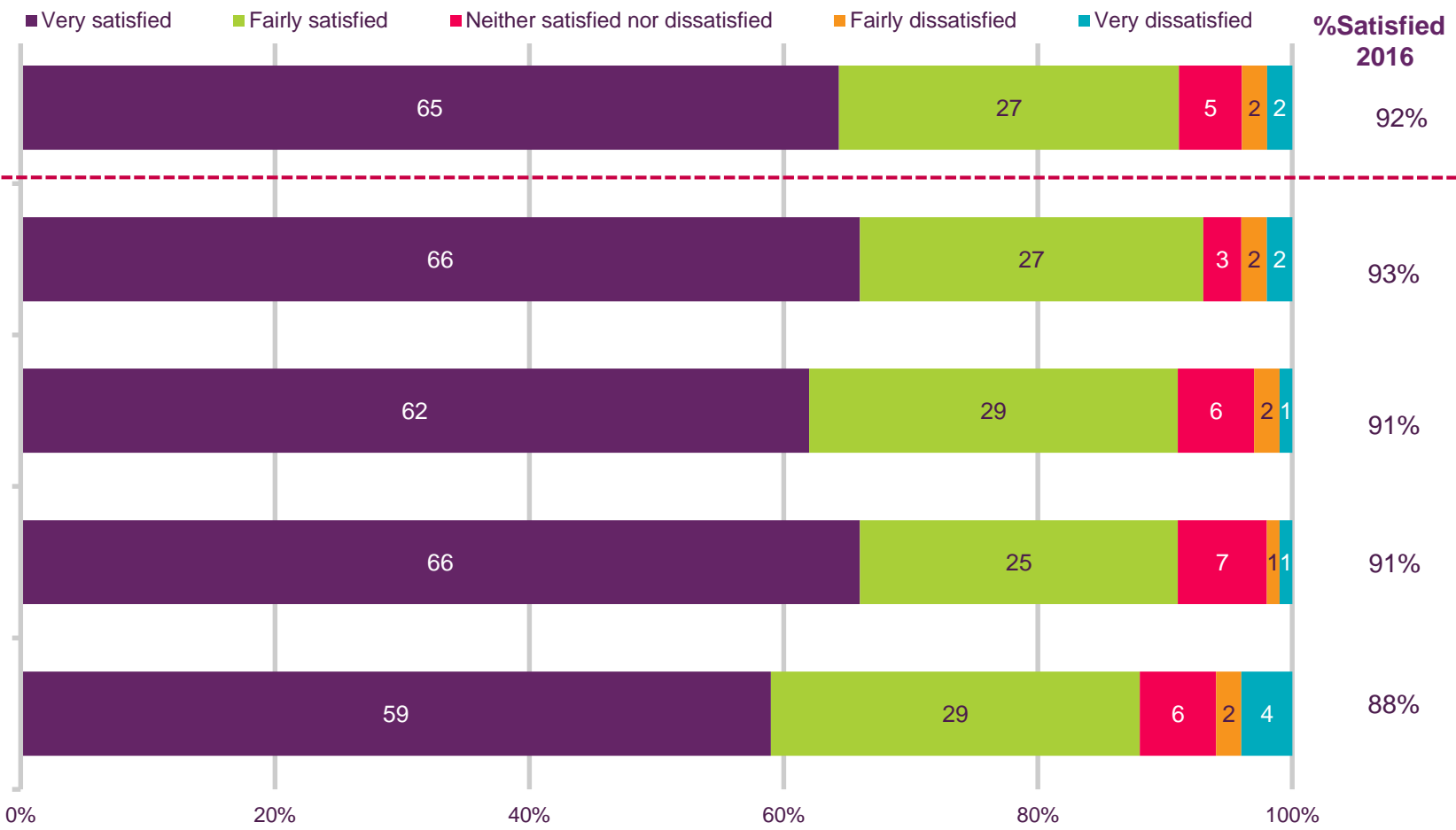
Satisfaction with reliability of service (reception/ease of accessing mobile network) among total market: 2013-2016



Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2013, 2014 and 2015
 QL5b/QM5b/QI5b/QT5b. And how satisfied are you with the RELIABILITY of your (SERVICE) from (PROVIDER)? Would you say you are...
 Base: All adults aged 16+ who are the decision-maker and express an opinion on fixed line (2013,1576) (2014, 1730) (2015, 2165) (2016, 1713), mobile (2013,1703) (2014, 1670) (2015, 2587) (2016, 2259), fixed broadband (2013,1283) (2014, 1459) (2015, 1864) (2016, 1527), pay TV (2013, 908) (2014, 1006) (2015, 1302) (2016, 1083). 'Don't know' responses have been excluded from the base.

About nine in ten landline customers were satisfied with the reliability of their landline service

Satisfaction with reliability of service, by landline provider - total market



Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2016

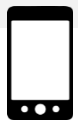
QL5b. And how satisfied are you with the RELIABILITY of your (SERVICE) from (PROVIDER)? Would you say you are...

Base: All adults aged 16+ who are the decision-maker and express an opinion on fixed line (1713), receiving their service from BT (665), Sky (379), Virgin Media (332), TalkTalk (169). Providers used by fewer than 100 respondents are not shown individually but are included in the total. 'Don't know' responses have been excluded from the base.



Customers of Three reported lower overall satisfaction with their mobile reception than mobile customers as a whole (80% vs 86%)

Satisfaction with reception/ease of accessing mobile network, by mobile provider – total market



Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2016

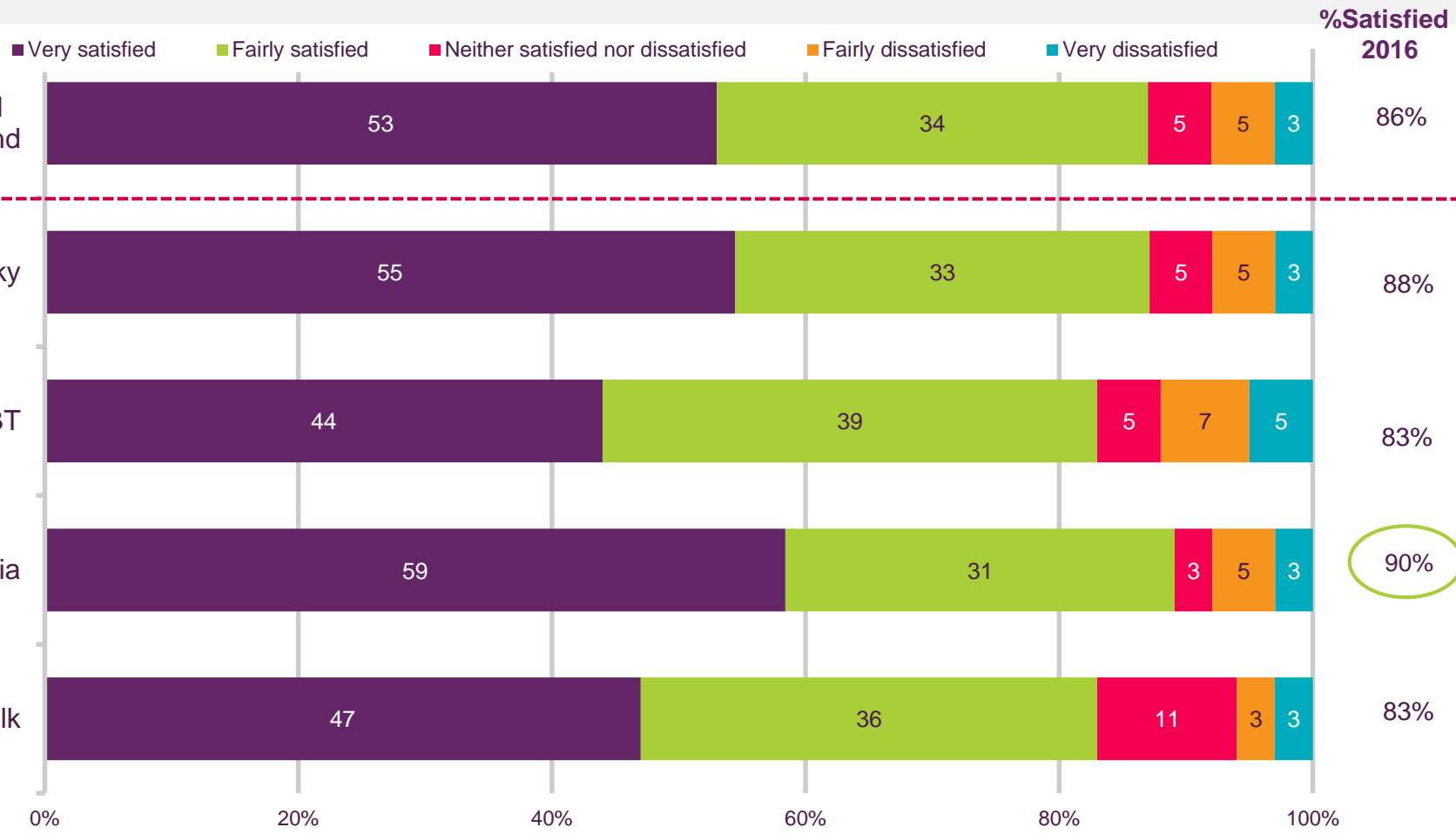
QM5b. And how satisfied are you with the RECEPTION or EASE OF ACCESSING the (PROVIDER) network? Would you say you are...

Base: All adults aged 16+ who are the decision-maker and express an opinion on mobile (2259), receiving their service from EE (577), O2 (554), Vodafone (315), 3 (225), Virgin (150), Tesco (140). Providers used by fewer than 100 respondents are not shown individually but are included in the total. 'Don't know' responses have been excluded from the base



Virgin Media customers reported higher overall satisfaction with the reliability of their fixed broadband service than fixed broadband customers as a whole (90% vs 86%)

Satisfaction with reliability of service, by fixed broadband provider



Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2016

Q15b. And how satisfied are you with the RELIABILITY of your (SERVICE) from (PROVIDER)? Would you say you are...

Base: All adults aged 16+ who are the decision-maker and express an opinion on fixed broadband (1527), receiving their service from Sky (416), BT (402), Virgin Media (357), TalkTalk (170). Providers used by fewer than 100 respondents are not shown individually but are included in the total. 'Don't know' responses have been excluded from the base



Over nine in ten pay TV customers were satisfied with the reliability of their service

Satisfaction with reliability of service, by Pay TV provider- total market



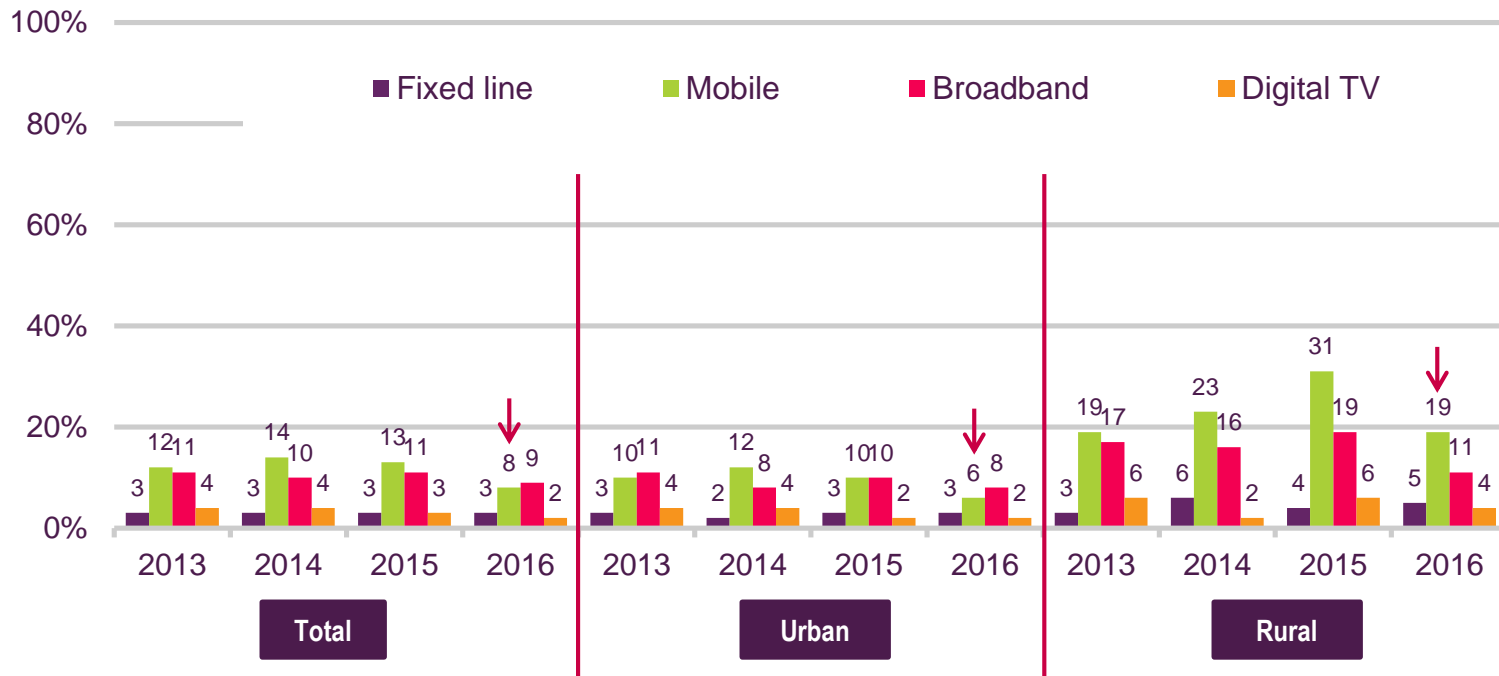
Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2016

QT5b. And how satisfied are you with the RELIABILITY of your (SERVICE) from (PROVIDER)? Would you say you are...

Base: All adults aged 16+ who are the decision-maker and express an opinion on Digital TV (1847) Pay TV (1083), receiving their service from Sky (634), Virgin Media (304). Providers used by fewer than 100 respondents are not shown individually but are included in the total. 'Don't know' responses have been excluded from the base.

Dissatisfaction with the reliability of service among both mobile and fixed broadband customers is higher in rural areas compared to urban areas

Dissatisfaction with reliability of service, by urbanity: 2013-2016



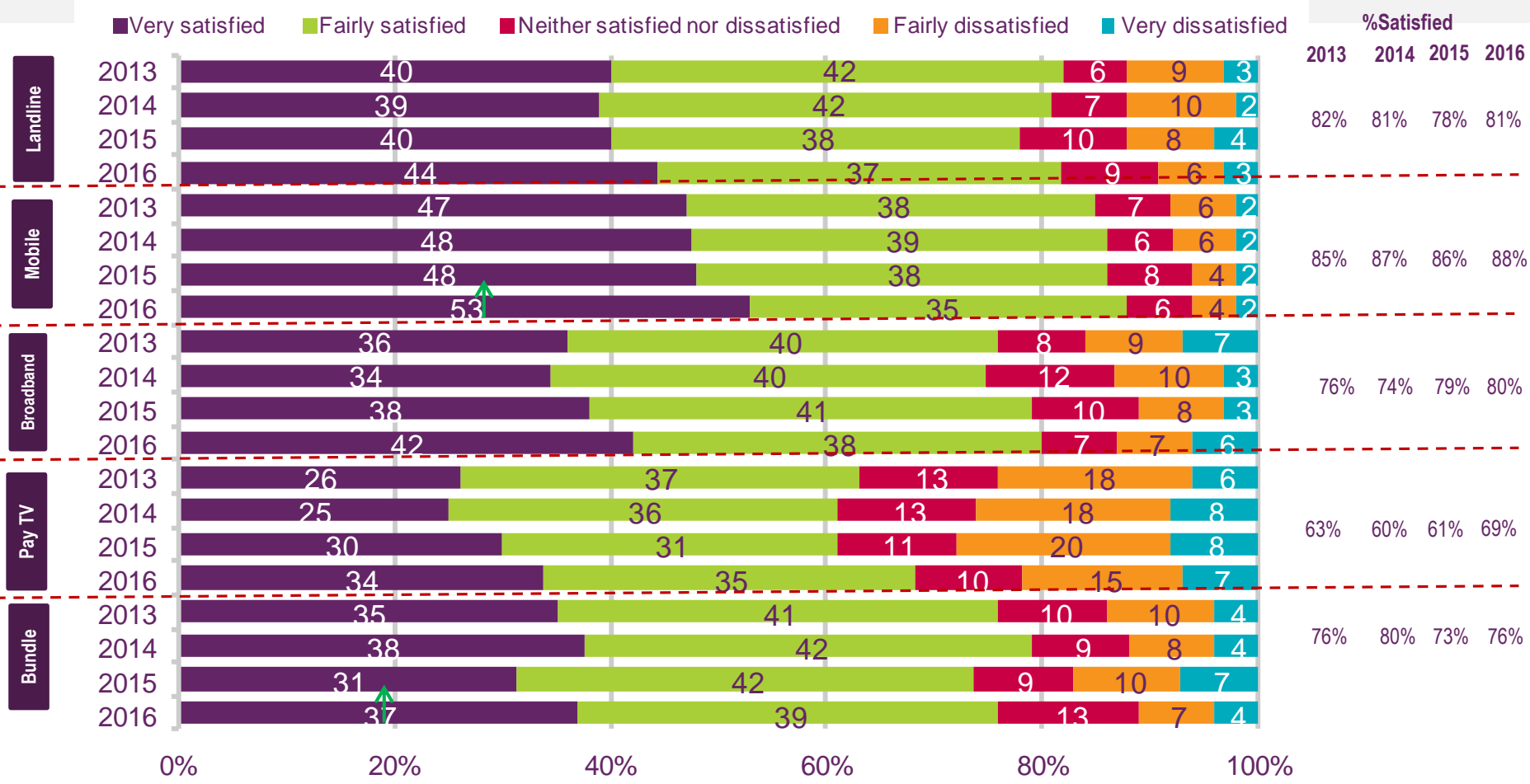
Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2013, 2014, 2015 and 2016

QL5b/QM5b/QI5b/QT5b. And how satisfied are you with the RELIABILITY of your (SERVICE) from (PROVIDER)? Would you say you are...

Base: All adults aged 16+ who are the decision-maker and express an opinion on fixed line (2016, 1713), mobile (2016, 2259), broadband (2016, 1527), digital TV (2016, 1847). 'Don't know' responses have been excluded from the base.

Satisfaction with value for money is highest in the mobile market and lowest in the pay TV market

Satisfaction with value for money: 2013-2016 – standalone service



Note: Value for money was asked only of those taking each service outside of a bundle. As a result sample is too small to chart by provider.

Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2012, 2013, 2014, 2015 and 2016

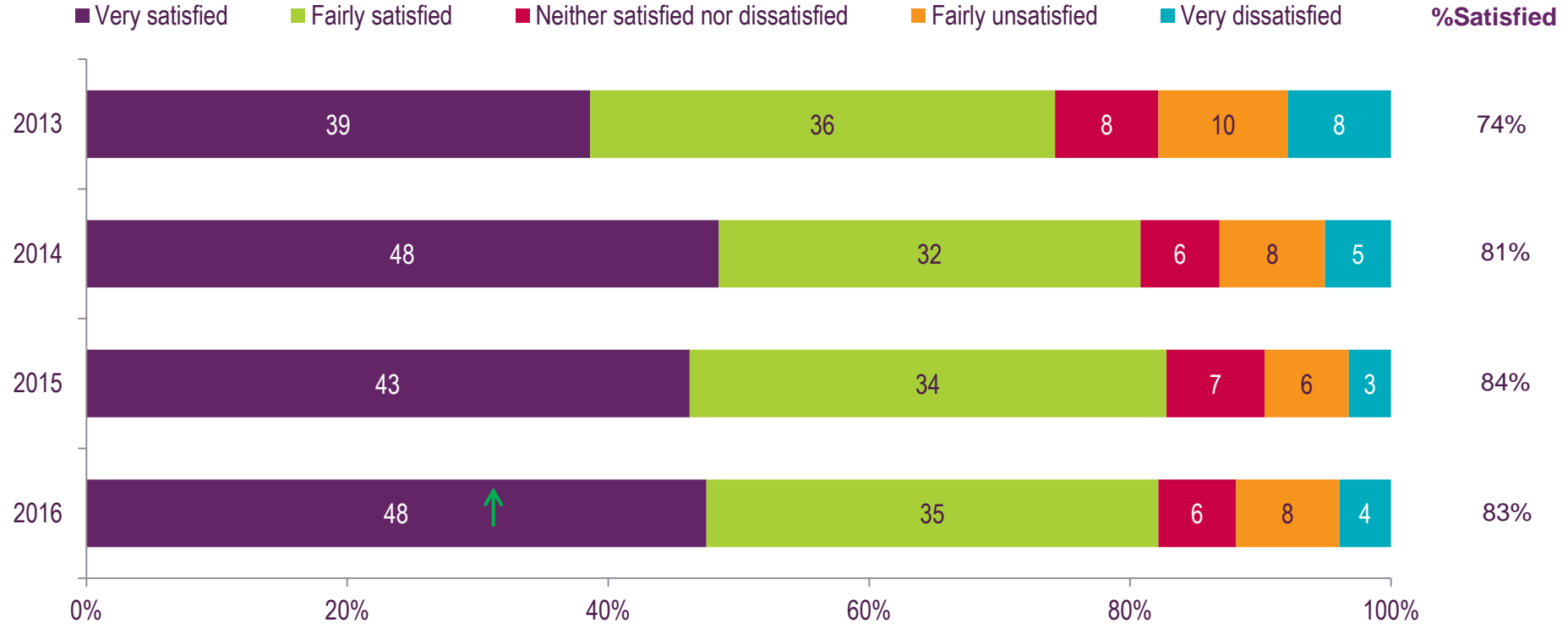
QL5a/QM5a/QI5a/QT5a. And how satisfied are you with the VALUE FOR MONEY of your service from (PROVIDER)? Would you say you are...

Base: All adults aged 16+ who are the decision-maker and express an opinion on fixed line (2016, 503), mobile (2016, 2106), broadband (2016, 272), pay TV (2016, 310), bundle (2016, 1308). 'Don't know' responses have been excluded from the base.



There has been very little change in satisfaction with speed of fixed broadband service in the last three years

Satisfaction with speed of fixed broadband service while online: 2013-2016



Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2012-2016

Base: All adults aged 16+ who are the fixed broadband decision-maker who expressed an opinion (2013, 1254) (2014, 1449), (2015, 1851) (2016, 1521). Q15c. And how satisfied are you with the SPEED OF SERVICE while online (not just the connection)? Would you say you are...

Note: 'Don't know' responses have been excluded from the base.



Customers of Virgin Media have higher satisfaction with their online broadband service and customers of BT and TalkTalk have lower satisfaction than customers as a whole

Satisfaction with speed of fixed broadband service while online, by fixed broadband provider



Source: Ofcom decision-making survey carried out by Saville Rossiter-Base in July to August 2016

Q15c. And how satisfied are you with the SPEED OF SERVICE while online (not just the connection)? Would you say you are...

Base: All adults aged 16+ who are the decision-maker and express an opinion on fixed broadband (1521), receiving their service from Sky (414), BT (400), Virgin Media (356), TalkTalk (170). Providers used by fewer than 100 respondents are not shown individually but are included in the total. 'Don't know' responses have been excluded from the base.

