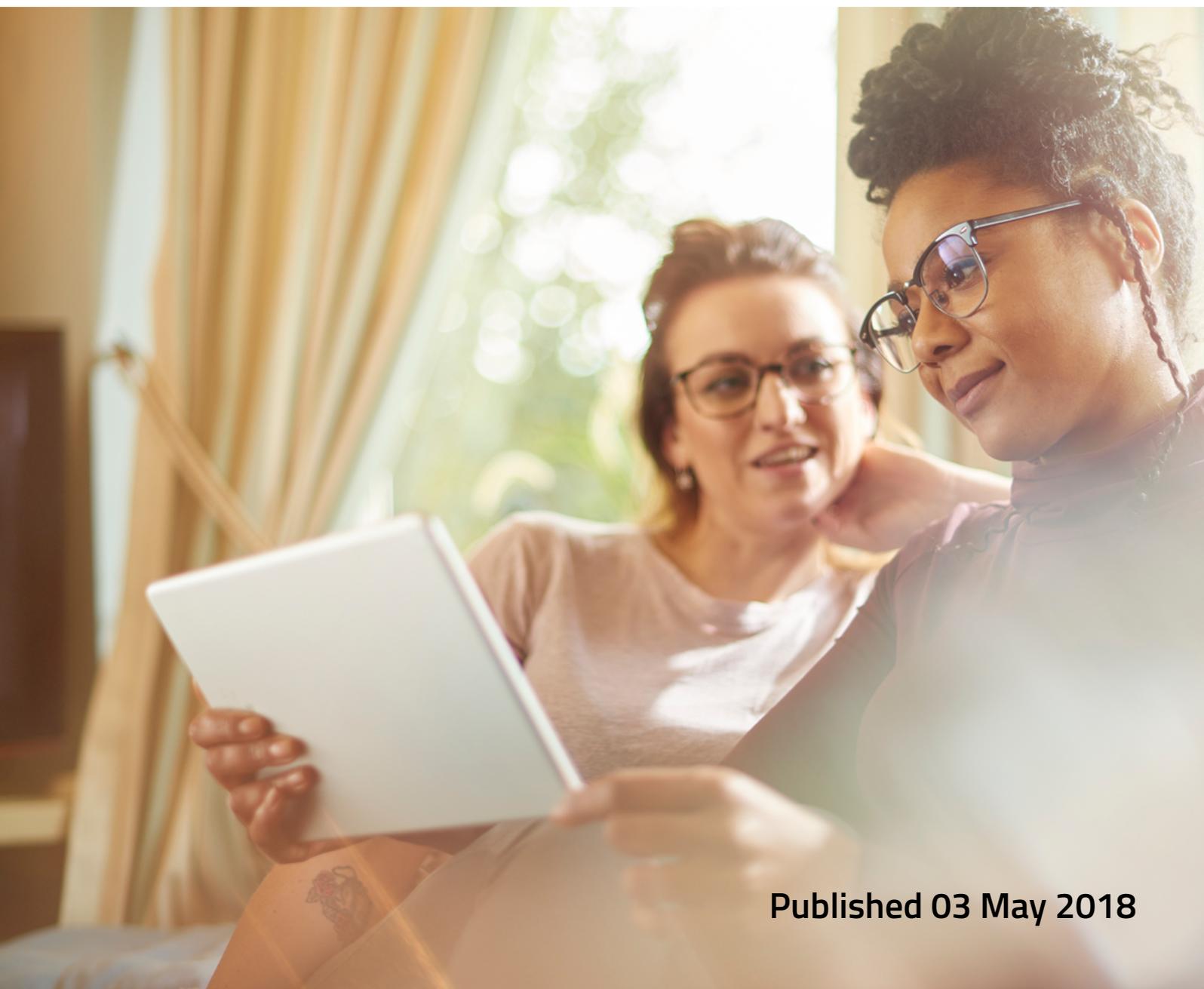


Choosing the best broadband, mobile and landline provider **Comparing Service Quality 2017**



Published 03 May 2018

About this document

This is the second annual Ofcom report on how telecoms providers are performing. It shows the quality of service offered by the UK's main broadband, mobile and landline providers to their customers in 2017. The information has been collected through our own research, directly from providers, and from third parties.

We want to shine a light on providers' performance to help consumers make more informed decisions, and to give providers additional incentives to improve the quality of the service they provide.

We will publish information at least annually to give consumers an up-to-date view on how providers are performing.

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Summary

Service quality matters

Communications services such as our home phone, mobile and broadband, help to keep us entertained, stay in touch with friends and family and make everyday tasks easier. But when they go wrong it can be inconvenient, disruptive and expensive. This means it's vital that communications providers deliver reliable services, and offer proper support when things aren't working.

Shining a light on customers' experiences means people can easily compare the service quality available. It allows them to look beyond the price and get a much richer picture of what they can expect from different companies. It also gives providers a clear incentive to improve their service quality.

This report looks at how well the larger providers did in 2017¹, based on information from consumers and industry.

Mobile phones

Overall, the vast majority of mobile phone customers were satisfied with their service

When asked, just over nine in ten mobile customers said they were satisfied with their service overall; which has not changed since 2016.

A small minority (4%) had a reason to complain. When they did, the main cause was that their service was not performing as it should be, followed by a billing, pricing or payment issue. Over half of mobile customers (56%) who complained to their provider were satisfied with how their complaint was handled, which was in line with 2016.

¹ The fieldwork for the customer satisfaction and recommend to a friend market research was conducted between 5 January and February 2018.

Of the main mobile providers, giffgaff and Tesco Mobile scored highly for customer satisfaction

The two mobile providers that ranked higher than average for overall customer satisfaction were giffgaff and Tesco Mobile; while Virgin Mobile and Vodafone both ranked lower than average.



Customers of giffgaff and Tesco Mobile were more likely to say they would recommend their provider

When asked, giffgaff and Tesco Mobile customers were more likely than average to say they would recommend their provider to a friend.² In contrast, Virgin Mobile and Vodafone customers were less likely to say they would do so.

Recommend to a friend: Mobile providers	
More likely to recommend	giffgaff Tesco Mobile
Mobile average	EE · O2 Three
Less likely to recommend	Vodafone Virgin Mobile

Home broadband

Fast broadband has become essential for day-to-day activities such as business, entertainment and socialising. The amount of data residential broadband customers used per line last year grew by 44%.

Average download speeds have also been rising sharply in recent years. The main reason for this has been the growth in take-up of superfast broadband packages.

However, although superfast broadband is now available to 93% of premises, around two in five still use standard broadband. This is reflected in the slower speeds that some households receive. Most homes on standard broadband packages could receive faster speeds if they upgraded to faster broadband packages.

² Net Promoter Score™ (NPS™), see Annex 2 for further details on how this metric is calculated. The average ‘recommend to a friend’ score in the mobile market was good (22). Giffgaff and Tesco Mobile had “excellent” scores, while all other mobile providers had “good” scores.

Broadband customers' overall satisfaction has fallen since 2016

Eight in ten broadband customers were satisfied with their service overall, down from just less than nine in ten in 2016. Customers highlighted that their dissatisfaction was mainly due to unreliable broadband connections and slow speeds.

TalkTalk's broadband customers were less satisfied than average with their service overall.³

Customers on faster broadband packages were more satisfied with the speed they received

Broadband customers' satisfaction with the speeds they received has fallen compared to 2016, (from 83% to 77%), however those on faster broadband packages were more satisfied than those on standard broadband packages.

Virgin Media was the only provider with above average customer satisfaction with broadband speeds.

Virgin Media broadband customers were more likely to recommend their provider

When asked, Virgin Media's customers were more likely than average to say they would recommend their provider to a friend.⁴ TalkTalk's customers were less likely to say they would do so.

Recommend to a friend: Broadband providers	
More likely to recommend	Virgin Media 
Broadband average	BT · EE Plusnet · Sky
Less likely to recommend	TalkTalk

There has been a rise in the proportion of broadband customers with a reason to complain

One in seven broadband customers had a reason to complain in 2017, (a rise from 13% in 2016 to 15%). By far the most common cause was a slow and patchy connection. At 18%, TalkTalk customers were more likely than average to have had a reason to complain.

³ All other providers' scores were in line with the average.

⁴ The average 'recommend to a friend' score in the broadband market was good (6). Virgin Media's score was 15, while TalkTalk's was -13.

Broadband providers need to improve their handling of complaints

Broadband customers' satisfaction with their how their complaints were handled fell in 2017 (from 56% to 50%). In particular, people were less happy with how their complaints about broadband service quality issues, such as slow broadband speeds, were handled.

EE and Sky had high customer satisfaction with complaints handling⁵

There were differences in satisfaction with how broadband providers handled complaints. Almost three-fifths of EE and Sky customers said they were satisfied, but only two-fifths of TalkTalk's customers were satisfied.



On average, EE broadband customers had the shortest wait to speak to their provider on the phone

The average time broadband customers had to wait to speak to their provider on the phone varied widely. Of the largest broadband providers, EE customers had the shortest wait time (48 seconds on average). Plusnet's customers had the longest wait, of just under eight minutes.



Most home phone and broadband orders were installed within 13 calendar days, but a small minority took more than four weeks

The majority of new landline and broadband orders were delivered by the date agreed with the customer, including any rearrangements agreed in advance. On average, new services were delivered by the main providers within 13 calendar days.⁶ However, a small minority of orders (less than 6%) took more than four weeks to be delivered. Sometimes long installation times are due to factors outside providers' control; for example, where permission to conduct street works is required, or right of way needs to be agreed to install equipment on private land.

⁵ Compared to the average.

⁶ The time taken to deliver a new order depends on the type of order and network used, see main report for details.

BT and Post Office (broadband) have prioritised service quality by paying for quicker repairs than other providers on the Openreach network

Where service issues are caused by network faults⁷, providers need to ensure they are fixed quickly. If providers using Openreach identify a network fault, they rely on Openreach engineers to fix the problem. How quickly that fault is fixed depends in part on which Openreach service level the provider buys.

In 2017, BT and the Post Office (broadband) were the only providers that paid for Openreach to fix faults within one working day for most of their customers. Most major providers on the Openreach network paid for repairs within two working days. Although Openreach does not fix every fault on time, BT and Post Office (broadband) customers will generally have their service fixed more quickly than other major providers on Openreach's network.

Openreach repair level used for most residential customers (December 2017)

<i>One working day repair (level 2)</i>	<i>Two working days repair (level 1)</i>
BT Post Office (broadband)	EE Plusnet Post Office (landline) Sky TalkTalk

One working day is the basic service level for fibre-to-the cabinet products

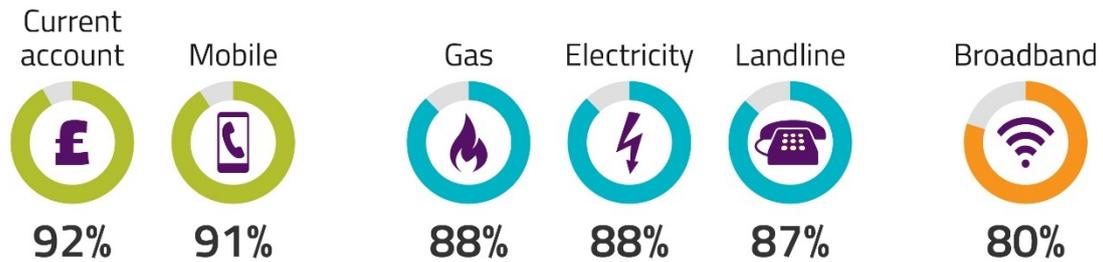
Service problems can arise in the home, as well as on the network

If diagnosed correctly, problems in the home can often be resolved quickly by providers through effective customer support. Consumers can also use Ofcom's [broadband checker app](#) to test their broadband connection and get tips on how to improve it. We have also published new [guides](#) on how consumers can improve their broadband speeds.

Comparison with other sectors

Overall satisfaction among mobile customers was in line with that among current account customers, and above gas, electricity and landline customers. However, satisfaction among broadband customers was below all of these other sectors.

⁷ We estimate that these faults occur approximately every 8 to 9 years for lines carrying standard broadband services, once every 12 years for landline-only services, and once every 7 years for line carrying superfast broadband services.



How Ofcom is working to improve service quality in the communications sector

This report is just one element of Ofcom's plan to improve service quality, which also includes:

- introducing automatic compensation for slow repairs, missed appointments and delayed installations from March 2019;
- improving the Broadband Speeds Codes of Practice, to give new customers more accurate speeds information and a stronger right to exit if their speed falls below the minimum guaranteed level from March 2019;
- strengthening the rules on complaints handling to ensure that providers deal with complaints from consumers promptly and effectively, from October 2018;
- setting tougher quality of service standards for Openreach to install new lines and fix faults more quickly. These came into effect on 1 April 2018;
- setting wholesale price controls that strengthen Openreach's incentives to make long-term investments in service quality. These came into effect on 1 April 2018; and
- supporting the rollout of competing full-fibre networks, which will enable faster speeds and provide a more reliable service. In addition, the broadband USO will help improve speeds for those who currently get less than 10 Mbit/s.



Dashboards

Broadband – overview of key data

		Overall average	BT	EE	Plusnet	Sky	Talk Talk	Virgin Media
Satisfaction		80%	79%	79%	86%	83%	72%*	83%
Customers with a reason to complain		15%	14%	14%	13%	14%	18%*	16%
Average call waiting time (mm:ss)		01:40	01:27	00:48	07:50	02:03	00:52	01:29
Ofcom complaints per 100,000 subscribers		75	115	61	99	29	113	54
Satisfaction with complaints handling		50%	50%	59%*	48%	57%*	40%*	46%

*Note: For definitions and methodology see relevant report section and annexes 1-2. Call waiting times are calculated for landline and broadband services together. Average call waiting time includes KCOM and Post Office. Red or green shading and * indicates significantly lower/higher than the sector average at the 95% confidence level for market research results.*

Landline – overview of key data

		Overall average	BT	EE	Plusnet	Post Office	Sky	Talk Talk	Virgin Media
Satisfaction		87%	88%	90%	81%	-	90%	82%*	84%
Customers with a reason to complain		4%	4%	3%	4%	7%	2%*	5%	4%
Average call waiting time (mm:ss)		01:40	01:27	00:48	07:50	00:53	02:03	00:52	01:29
Ofcom complaints per 100,000 subscribers		54	65	44	79	83	26	83	47
Satisfaction with complaints handling		53%	53%	-	-	-	58%*	44%*	53%

Note: For definitions and methodology see relevant report section and annexes 1-2. Call waiting times are calculated for landline and broadband services together. Average call waiting time includes KCOM. Red or green shading and * indicates significantly lower/higher than the sector average at the 95% confidence level for market research results. A sufficient sample was not obtained in the satisfaction research to be able to publish a metric for Post Office. Inclusion criteria for satisfaction with complaints handling research is those providers with a 4% or more market share; '-' represents no data for satisfaction with complaint handling due to providers having a market share of below 4% at Q1 2017.

Mobile – overview of key data

		Overall average	BT Mobile	EE	giffgaff	O2	Tesco Mobile	Three	Virgin Mobile	Vodafone
Satisfaction 		91%	-	93%	98%*	92%	97%*	89%	86%*	88%*
Customers with a reason to complain 		4%	-	2%*	1%*	3%	3%	3%	4%	7%*
Average call waiting time (mm:ss) 		00:58	00:43	00:53	-	01:17	00:51	00:52	00:58	-
Ofcom complaints per 100,000 subscribers 		21	47	14	-	12	3	13	33	48
Satisfaction with complaints handling 		56%	-	61%*	60%	57%	67%*	57%	49%*	47%*

*Note: For definitions and methodology see relevant report section and annexes 1-2. Red or green shading and * indicates significantly lower/higher than the sector average at the 95% confidence level. Vodafone's data on call waiting times was not comparable to other providers. giffgaff does not have a call centre and it does not meet the market share threshold to be included in Ofcom's published complaints data. Ofcom complaints data: Due to the different methodologies used to compile subscriber figures, we have identified through sensitivity checks that BT Mobile's performance in 2017 may be comparable to Vodafone. A sufficient sample was not obtained in the customer satisfaction research, satisfaction with complaints handling and reason to complain research to be able to publish a metric for BT Mobile.*



Background to the report

Service quality and the consumer experience

We rely heavily on phone and broadband services in our everyday lives, from keeping in touch with friends and family, to shopping or banking online, as well as for work. Our use of broadband services in particular has been evolving rapidly, and this has been reflected in a significant rise in the amount of data we use.⁸

It is essential that these services are reliable and perform well. If phone and broadband services are unreliable, they can quickly become a cause of real frustration. If they stop working completely, they can disrupt life at home and at work. When problems arise, it is vital that communications providers support consumers and address their issues effectively.

For consumers to be able to compare how different providers are performing, they need clear information on service quality. The aim of this report is to make such information available so that consumers can make informed purchasing decisions, and to give providers additional incentives to improve their performance.

This report focuses on the service quality⁹ offered by the main landline, fixed broadband and mobile providers in 2017:

- For **residential fixed services**, the main providers included are BT, EE, KCOM (Hull & East Yorkshire only), Plusnet, Post Office, Sky, TalkTalk and Virgin Media.
- For **residential mobile services** the main providers included are BT Mobile, EE, giffgaff, O2, Tesco Mobile, Three, Virgin Mobile and Vodafone.

⁸ Average data use per fixed line residential broadband connection increased by 44% year on year in June 2017, and average data use per mobile connection increased by 46%. See Ofcom, 2017, [Connected Nations Report](#), p.15, p.20.

⁹ In this report, service quality covers both service reliability and performance, as well as how effectively providers support consumers when they need help.

- For **business fixed services**, the providers included are BT Business, TalkTalk Business, Verastar, Virgin Media Business and XLN Telecom; and
- For **business mobile services**, the providers included are EE, O2 and Vodafone.

Information in this report

As with our first Comparing Service Quality report (published in 2017),¹⁰ we draw on Ofcom market research, complaints to Ofcom and to ADR schemes, as well as communications providers' own data.¹¹ In addition to trend data compared to last year, we have included new data this year, in particular a new measure of the likelihood of customers to recommend their current provider to a friend.¹²

As with last year's report, when requesting data from providers we have been limited to collecting data that they already hold for their own internal business purposes. In some cases, providers do not appear to be collecting data to measure the real consumer experience. For example, some providers are unable to report on their success at completing a new order on the date promised to the customer because they overwrite the original date if any changes are made to that date.

This makes it difficult to obtain comparable results, as each provider has different data collection systems and processes in place. As a result, we have been unable to report on fault frequency and repair times by provider.

However, we have used new information gathering powers¹³ to require providers to start collecting new data on faults, the provision of new services, and missed appointments from 2019 onwards.¹⁴ This should enable us to report on the extent to which providers are meeting commitments made to customers in future publications.

While our focus is on services for residential consumers, we have also looked at the service care levels offered with standard business contracts; these are the contracts more typically used by small and medium-sized businesses.

¹⁰ Ofcom, 2016, [Comparing Service Quality Report](#).

¹¹ For further information on our use of providers' data, [see Annex 1](#). For further information on the market research included in this report, [see Annex 2](#). For further information on how we use our complaints data see: Ofcom, [Telecoms and pay-TV complaints report: Q4 \(October to December\) 2017](#).

¹² The Net Promoter Score™ measures the willingness of customers to recommend a company's products or services to others, on scale of -100 to 100, [see Annex 2](#).

¹³ Under Section 137A, Communications Act 2003. These powers allow Ofcom to specify, in a proportionate way, data that providers should record.

¹⁴ Providers need to make systems and process changes to be able to gather this new data. Providers signed up to the automatic compensation scheme (BT, Virgin Media, TalkTalk, Sky) will start collecting this new data in March 2019, and we will look to publish it late 2019/early 2020.

In addition, we have developed a new webpage where consumers can find out more about service quality issues to help them choose the right provider.¹⁵

Other work to improve service quality

This report is part of Ofcom's wider strategy to drive service improvements in the telecoms industry.¹⁶ Other key work includes the following:

- **Introducing automatic compensation when things go wrong:** Following an Ofcom review, BT, Sky, TalkTalk, Virgin Media and Zen Internet have agreed to introduce automatic compensation when things go wrong.¹⁷ Specifically, from March 2019, they will give their broadband and landline customers money back when they experience delayed repairs following loss of service, delayed installations and missed appointments. This should also incentivise improved service quality.
- **Improving Openreach's performance:** In March 2018, we announced measures that will improve the reliability of the Openreach network, including tougher requirements to ensure more services are installed promptly and repairs completed when consumers expect them.¹⁸ These came into effect on 1 April 2018.
- **Strengthening broadband speeds information available to consumers and businesses:** From 1 March 2019, signatories to the Residential and Business Broadband Speeds Codes of Practice will be required to provide potential customers with better information on the broadband speeds they are likely to receive, before they commit to a new contract.¹⁹ The new codes also strengthen the right to exit that signatories have to offer customers if their speed falls below a minimum guaranteed level.
- **Supporting further rollout of networks:** We have published a package of measures to encourage the deployment of competing full-fibre networks which will ultimately benefit consumers as more UK homes will have access to ultrafast broadband, and more reliable networks which came into effect on 1 April 2018.²⁰ In addition, the broadband USO will help improve speeds for those who currently get less than 10 Mbit/s.²¹
- **Improving complaints handling:** We continue to monitor providers' compliance with Ofcom's complaint handling rules through an open enforcement programme.²² New rules will come into effect on 1 October 2018 to ensure that providers deal with complaints from consumers promptly and effectively.

¹⁵ Ofcom, [Choosing a provider](#).

¹⁶ The strategy was first set out in Ofcom's [Digital Communications Review](#), which concluded that a step change in service quality was needed.

¹⁷ The providers are BT, Sky, TalkTalk, Virgin Media and Zen Internet. Further details can be found [here](#).

¹⁸ Ofcom, 2018, [Quality of Service for WLR, MPF and GEA Statement](#).

¹⁹ Ofcom, 2018, [Better Broadband Speeds Information – Voluntary Codes of Practice Statement](#).

²⁰ Ofcom, 2018, [Wholesale Local Access Market Review Statement](#).

²¹ [The Electronic Communications \(Universal Service\) \(Broadband\) Order 2018](#).

²² Ofcom, 2018, [Monitoring and Enforcement Programme on complaints handling](#).

Legal framework for this report

Under Section 3 of the Communications Act 2003 (“the Act”) our principal duty, in carrying out our functions, is to further the interests of (a) citizens in relation to communications matters; and (b) consumers in relevant markets, where appropriate by promoting competition.

In preparing and publishing this report, we have carried out a number of our statutory functions:

- Under Section 14 of the Act we have a duty to carry out consumer research on certain topics. Under Section 15 we have a duty to publish the results of such research; and to consider and take account (to the extent we think fit) of the results of such research in carrying out our functions.
- Under Section 26 of the Act we must arrange for the publication of such information and advice about matters in relation to which we have functions, including to the customers of communications providers.
- Under Section 134D of the Act we may carry out and publish comparative overviews of the quality of public electronic communications services, in the interest of the end-users of such services.²³ Under Section 136(1) of the Act we may require communications providers to provide us with such information as we consider necessary for the purpose of carrying out a comparative overview under Section 134D. We used this power to obtain some of the data set out in this report.

²³ As well as the prices of such services.



Residential landline and fixed broadband services

Overview

This section explores the service quality experienced by consumers using landline and fixed broadband services in 2017,²⁴ including:

- **Overall satisfaction** - how satisfied consumers were with their service, and whether they would recommend their provider to a friend.
- **Getting a new service** - how long it took for new landline and fixed broadband orders to be delivered.
- **Landline and broadband faults** – how providers can make a difference to the time taken to fix faults.
- **Missed appointments** – the extent to which providers and customers have missed appointments for installations and repairs.
- **Customer service** – consumers’ experience of contacting providers.
- **Reasons to complain and complaints volumes** – whether consumers had a reason to complain and how many consumers complained to Ofcom.
- **Satisfaction with complaints handling** - how effectively providers dealt with and resolved complaints.
- **Complaints taken to an alternative dispute resolution scheme** – whether complaints against providers were upheld by an alternative dispute resolution scheme.

²⁴ The fieldwork for the Customer Satisfaction Survey was conducted from 3rd January to 15th February 2018.

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

Overall satisfaction

Customer satisfaction with fixed broadband services has fallen since 2016

Since 2016, there has been a decline in broadband customers' overall satisfaction with their fixed broadband service, down to 80% from 87% in 2016. Where customers said they were dissatisfied,²⁵ the top two reasons were poor or unreliable broadband connectivity (48%) and slow speeds (47%).

Speed and reliability are key factors for broadband customers

There has been a decline in customer satisfaction with the reliability²⁶ and speed of broadband services compared to 2016.^{27,28} However, a significantly higher proportion of superfast and ultrafast broadband customers (82% and 86%, respectively) were satisfied with the speed of their service compared to standard broadband customers (71%).²⁹

Figure 1: Satisfaction with fixed broadband provider

	Average broadband	BT	EE	Plusnet	Sky	TalkTalk	Virgin Media
Satisfaction with overall service	80% ▼	79%	79%	86%	83%	72%* ▼	83% ▼
Satisfaction with reliability of service	80% ▼	81%	82%	82%	81% ▼	73%*	82% ▼
Satisfaction with speed of service	77% ▼	77%	76%	70%	76% ▼	71%	82%* ▼

Source: *Ofcom Customer Satisfaction Tracker survey 2018*

Base: All adults aged 16+ who are the decision maker and express an opinion on their fixed broadband internet service. Base sizes are variable. See data tables for more information.

Providers used by fewer than 100 respondents are not shown individually but are included in the total; unless otherwise stated. 'Don't know' responses have been excluded from the base. Red or green shading and * indicates significantly lower/higher than the sector average at the 95% confidence level. Arrows represent a significant increase or decrease compared to 2016

²⁵ 11% of customers said they were not satisfied with their broadband service overall.

²⁶ Down to 80% from 86% in 2016.

²⁷ Down to 77% from 83% in 2016.

²⁸ Data tables can be found [here](#) and a slide pack of key results can be found [here](#).

²⁹ In this research, we defined broadband speeds as follows: standard - a download speed of up to 30Mbit/s; superfast - a download speed of between 30Mbit/s and 100Mbit/s; and ultrafast - a download speed of 100Mbit/s or higher. Since conducting this research, Ofcom's definition of ultrafast has changed to a download speed of 300Mbit/s or higher.

Fast broadband has become essential for day-to-day activities such as business, entertainment and socialising, and the amount of data residential broadband customers used per line last year grew by 44%.³⁰ Average download speeds have also been rising sharply in recent years. The main reason for this has been the growth in take-up of superfast broadband packages.

However, although superfast broadband is now available to 93% of premises,³¹ around two in five still use standard broadband.³² This is reflected in the slow speeds that some households receive. Most homes on standard broadband packages could receive faster speeds if they upgraded to faster broadband packages.

Ofcom will shortly be publishing the UK Home Broadband Performance report 2018, with data on the performance of UK fixed-line home broadband services.

Virgin Media ranked higher than average for satisfaction with broadband speed

Although satisfaction with service, reliability and speed have declined overall, there were however differences by provider. Virgin Media ranked higher than average for satisfaction with speed of service, while TalkTalk ranked lower than average for overall satisfaction, as well as for satisfaction with reliability of service.

Virgin Media’s customers were more likely to recommend their provider

We asked broadband customers how likely they would be to recommend their broadband provider to a friend.³³

Virgin Media customers were more likely than average³⁴ to say they would recommend their provider to a friend, while TalkTalk customers were less likely to say they would do so.

Recommend to a friend: Broadband providers	
More likely to recommend	Virgin Media
Broadband average	BT · EE · Plusnet · Sky
Less likely to recommend	TalkTalk

³⁰ See Ofcom, 2017, [Connected Nations Report](#), p.15

³¹ Ofcom, [Connected Nations Update: Spring 2018](#)

³² See Ofcom, 2017, [Connected Nations Report](#).

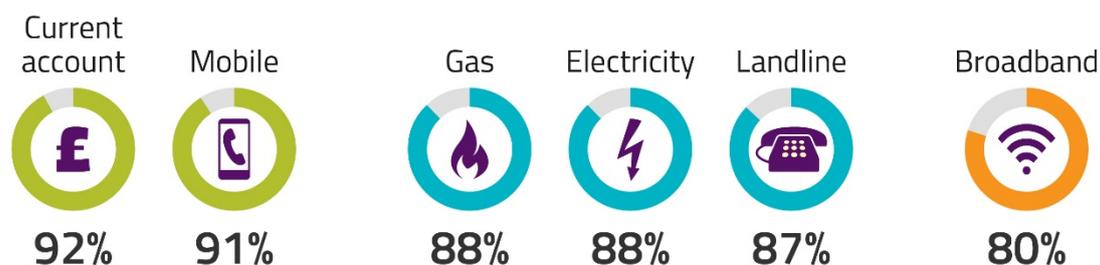
³³ Net Promoter Score™ (NPS™), see [Annex 2](#) for further details on how this metric is calculated. Full results can be found in the data tables [here](#) and slide pack [here](#).

³⁴ Based on the global NPS™ standards, any score above 0 is considered “good”, 50 and above is considered excellent, [see Annex 2](#) for further details. The average ‘recommend to a friend’ score in the broadband market was good (6). Virgin Media’s score was 15, while TalkTalk’s was -13.

Overall satisfaction in the broadband market was below satisfaction in other sectors

The level of overall satisfaction among broadband customers was below that among mobile and landline customers, as well as among current account, gas and electricity customers.

Figure 2: Customers' overall satisfaction with communications providers compared to current account and energy providers



Source: [Ofcom Customer Satisfaction Tracker survey 2018](#)

L1/M2/IN2/PT1/B1/BM3/BM9/BM10: 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 their landline service(2252), their mobile phone service (2861), their fixed broadband service (2263), their pay TV service (1487), their services taken with the same supplier (2182), their main current account provider (2867), their gas provider (2212), their electricity provider (2536). 'Don't know' responses have been excluded from the base

Customer satisfaction in the landline market remained high³⁵

Nearly nine in ten landline customers reported that they were satisfied with their overall service, which was in line with 2016. The level of customer satisfaction with the reliability of service was also high and comparable with that for 2016.

Where customers were dissatisfied,³⁶ the top two reasons were poor or unreliable service (37%), and the expense of the service (27%).

Overall satisfaction among TalkTalk's customers was below average.³⁷

³⁵ Data tables can be found [here](#) and a slide pack of key results can be found [here](#).

³⁶ 4% of customers said they were not satisfied with their overall landline service.

³⁷ Satisfaction with overall service is not registered as significant for Plusnet due to lower base size of Plusnet respondents.

Figure 3: Satisfaction with landline provider³⁸

	Average landline	BT	EE	Plusnet	Sky	TalkTalk	Virgin Media
Satisfaction with overall service	87%	88%	90%	81%	90%	82% *	84%
Satisfaction with reliability of service	90%	91%	92%	87%	90%	87%	91%

Source: *Ofcom Customer Satisfaction Tracker survey 2018*

Base: All adults aged 16+ who are the decision maker and express an opinion on their landline service (2252). Base sizes are variable. See data tables for more information. Providers used by fewer than 100 respondents are not shown individually but are included in the total; unless otherwise stated. 'Don't know' responses have been excluded from the base.

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

Landline providers all received a recommend a friend score in line with the average

For landline, the extent to which customers said they would be likely to recommend their provider did not vary by provider, when compared to the average.³⁹

Recommend to a friend: Landline providers	
More likely to recommend	-
Landline average	BT · EE · Plusnet · Sky TalkTalk · Virgin Media
Less likely to recommend	-

Getting a new service

Most landline and broadband orders were delivered on the date agreed

A consumer's first experience of a provider's service quality is when they place their first order. It is important that all new orders are provided quickly, on the date agreed, and that any delays are managed effectively.

The majority (94%) of landline and broadband orders were delivered by the date agreed with the customer, including any rearrangements agreed in advance⁴⁰ in 2017.⁴¹ Some providers were

³⁸ Comparison with satisfaction measures for 2016 is not possible for EE and Plusnet, as the sample size for these providers was not large enough in previous research.

³⁹ Based on the global NPS™ standards, any score above 0 is considered "good", 50 and above is considered excellent. The average 'recommend to a friend' score in the landline market was good (11). See [Annex 2](#) for further details.

⁴⁰ For providers who could record date changes, around 2% of total orders were rearranged by the provider.

⁴¹ Ofcom analysis of data from BT, EE, Virgin Media, Sky and TalkTalk and measured from the last service commitment date provided to the customer and includes home moves and regrades. It has not been possible to publish provider-specific figures here. See [Annex 1](#) for further details.

unable to report on their success at completing a new order on the date first promised to the customer because they overwrite the original date if any changes are made. We expect to be able to report on this when we start receiving new data in 2019, under new information gathering powers.

Where a customer was moving home but staying with the same provider, nine in ten (90%) orders were delivered by the date agreed.⁴² This lower success rate may in part reflect dates for home moves changing at short notice.⁴³

On average, it took 13 days for a landline or broadband order to be delivered

Across the main providers, it took an average of 13 calendar days to deliver a landline or broadband order in 2017;⁴⁴ this was a slight improvement compared to 2016.⁴⁵ On average orders in rural areas took an additional 1 day to be completed.⁴⁶

There are several reasons why orders can take 13 days or longer to be delivered. Ofcom rules require that switches between providers within the Openreach or KCOM networks take a minimum of ten working days,⁴⁷ and orders can take longer to complete if a customer wants the service to be delivered at a later date (e.g. when the customer is moving into a new home).

The time taken to deliver an order can depend on the type of order and network

In addition, the time taken to deliver a service can depend on the type of order placed by the customer. On the Openreach network, a product change for an existing customer (such as moving to a package with a faster broadband speed), took 14 days on average, compared to 16 days for providing a new customer with a service, and 17 days for a home move. A product change on the Openreach network takes almost as long as other types of order because upgrading to superfast broadband on the Openreach network often requires a physical change in the equipment used to deliver the new service. As customers move onto Fibre-to-the-Premises networks, the average time taken to deliver a product upgrade on the Openreach is likely to decline.

⁴² Ofcom analysis of data from BT, EE, Virgin Media, Sky and TalkTalk and measured from the last service commitment date provided to the customer.

⁴³ For next year's report, we intend to review with providers the main drivers for this lower success rate.

⁴⁴ Ofcom analysis of data from BT, EE, Virgin Media, Sky and TalkTalk and measured from the order date to the last service commitment date provided to the customer and includes home moves and regrades.

⁴⁵ In 2016, it took 14.5 days to deliver a new landline or broadband order.

⁴⁶ Ofcom analysis of data from BT, EE, Virgin Media, Sky and TalkTalk and measured from the order date to the last service commitment date provided to the customer and includes home moves and regrades. Urban and rural postcodes identified using the Locale classification – see [Annex 1](#) for further details.

⁴⁷ This is so that a consumer can stop the switch if they have not agreed to it or have changed their mind.

Figure 4: Time to provide a landline or broadband service on the Openreach network⁴⁸

	Percentage of all providers' orders	Average time to provide (calendar days) ⁴⁹
New Customer Service – where a new service is ordered, by a new customer, either a new line or a new customer who is switching from another provider ⁵⁰	67%	16
Home Move – where the customer is moving home and wishes to take over an active line at their new premises while remaining with their current provider ⁵¹	8%	17
Product Change – where a customer wishes to stay with their provider but change their current service, for example by upgrading to a faster broadband speed	25%	14

Source: Ofcom analysis of BT, Sky, EE, TalkTalk, Plusnet, and Post Office data

On the Virgin Media network, a self-install by the customer typically took 6 days and an engineer-install of a new line took 19 days.⁵² A product change on Virgin Media's network took 2 days, (however, this figure is not directly comparable to the figure for Openreach product changes).⁵³ Some customers upgrading may need to wait for a new router from their provider to arrive; but where this is not the case, Virgin Media can activate the regrade on the same day.

⁴⁸ Providers included in this analysis are BT, EE, Sky, Virgin Media and TalkTalk. More information on how Ofcom derived this and other information from provider data can be found at [Annex 1](#). For 2017, Ofcom reduced the number of "order types" by including restarts and transfers in the "new line" category.

⁴⁹ Rounded up to the nearest full day.

⁵⁰ As set out at [Annex 1](#), this order type combines the "new line", "restart" and "transfer" categories used in 2016.

⁵¹ This does not include home moves where a new customer has switched from another provider.

⁵² Or to repair a line that already existed.

⁵³ Virgin Media's data includes regrades provided proactively by Virgin Media, that were not initiated by the customer.

Figure 5: Time to provide a landline or broadband service on the Virgin Media network⁵⁴

	Percentage of all providers' orders	Average time to provide (calendar days) ⁵⁵
'Quickstart' self-install – where the home has an existing Virgin Media line and the customer can complete the installation themselves	18%	6
Engineer install - where an engineer is required to install a new Virgin Media line into the home or repair an existing Virgin Media connection	32%	19
Product change – where a customer wishes to stay with their provider but change their current service, for example by upgrading to a faster broadband speed	50%	2

Source: Ofcom analysis of Virgin Media data. The ten-day -working minimum switching rules does not apply to Virgin Media orders. Note: Virgin's product change data includes regrades not requested by the customer and is not directly comparable to Openreach providers' data.

As set out in the tables above, the time taken to deliver an order can depend on the network used.

The vast majority of orders were delivered within four weeks

There were limited differences in the time taken to complete landline and broadband orders by provider on the Openreach network. Although EE completed fewer orders compared to the other providers at two weeks, overall there was little difference in the average number of days it took all providers to deliver a new order. In addition, each provider completed the vast majority of orders within four weeks.

Figure 6: Percentage of landline and broadband services provided within four weeks of the order date, and average number of days taken to provide (providers on Openreach network)⁵⁶

	One week	Two weeks	Three weeks	Four weeks	Average Days ⁵⁷
BT	15%	53%	84%	93%	16
EE	11%	38%	89%	96%	16
Sky	17%	55%	88%	95%	15
TalkTalk	11%	54%	90%	96%	15

Source: Ofcom analysis of provider data

⁵⁴ We have not reported separately on the time taken to complete Virgin Media home moves in 2016 or 2017 but will explore this for future publications.

⁵⁵ Rounded up to the nearest full day.

⁵⁶ Ofcom analysis of provider data. The time taken to provide a new service is calculated by taking the difference between the order date and service activation date. More detail on our methodology is available in [Annex 1](#). Plusnet and the Post Office were unable to provide data in line with our requirements and have been excluded from this analysis.

⁵⁷ Rounded up to the nearest full day.

Virgin Media, to whom the ten-working day switching rule does not apply, completed almost seven in ten orders in one week and more than eight in ten orders in two weeks. The main driver of Virgin Media’s high completion of orders in one and two weeks is the relative ease with which it can deliver product upgrades.

Figure 7: Percentage of landline and broadband services provided within four weeks of the order date (Virgin Media)⁵⁸

	One week	Two weeks	Three weeks	Four weeks	Average days ⁵⁹
Virgin Media	68%	84%	90%	94%	8

Source: Ofcom analysis of provider data. Note: This data includes regrades not requested by the customer and is not directly comparable to other providers’ data.

In 2017, KCOM⁶⁰ completed a much lower proportion of its orders in one, two, three and four weeks than it did in 2016. For example, in 2016 it completed four-fifths of orders in two weeks, whereas in 2017 it completed only three-fifths of orders in two weeks. KCOM reported that this was in part due to limitations in its IT systems, as well as its Fibre-to-the-Premise (FTTP) rollout programme.⁶¹

Figure 8: Percentage of landline and broadband services in Hull and East Yorkshire provided within four weeks of the order date (KCOM)⁶²

	One week	Two weeks	Three weeks	Four weeks	Average days ⁶³
KCOM	6%	60%	74%	79%	20

Source: Ofcom analysis of provider data

But a small minority of orders took more than four weeks to be delivered

Very long installation times may cause frustration and inconvenience for consumers, even if their expectations have been managed by their provider. In 2017, fewer than six per cent of orders (around 400,000 orders in total) took more than four weeks to be delivered, and around one per cent took more than eight weeks.⁶⁴

Sometimes long installation times are due to factors outside providers’ control; for example, where permission to conduct street works is required, or ‘wayleaves’ need to be agreed to install or run

⁵⁸ Ofcom analysis of provider data.

⁵⁹ Rounded up to the nearest full day.

⁶⁰ KCOM is the universal service provider in Hull.

⁶¹ Due to the time taken to deliver FTTP, where a customer ordered an FTTP service and did not already have broadband, KCOM would provide a standard ADSL service in the interim, to ensure that customers had access to a broadband service.

⁶² Ofcom analysis of provider data.

⁶³ Rounded up to the nearest full day.

⁶⁴ Ofcom analysis of provider data for BT, EE, Sky, TalkTalk and Virgin Media.

equipment on private land. Next year, we intend to look more closely at the reasons why services took longer than four weeks to be delivered.

Four per cent of orders on Openreach's network were reported as not working⁶⁵

Around four per cent⁶⁶ of new orders for landline and/or broadband services on the Openreach network were reported by the customer as not working on the date of delivery. Such orders require an engineer visit or a new customer router to be sent out to resolve the issue. This is likely to be a source of frustration for consumers, and is an area that we will consider further for next year's report.

Landline and broadband faults

Having access to a reliable service is essential for landline and broadband customers to be able to get the most from their service. Where service faults occur, it is vital that these are diagnosed and resolved quickly.

Faults can occur in the home

Sometimes customers lose their service or experience poor service quality, (such as a slow or patchy connection), because of a problem originating in their own home. Common in-home issues include incorrect set-up of the home network, faulty wiring in the home, use of old or faulty equipment, wifi interference and user error.⁶⁷

For these types of problem, effective customer service may be able to help resolve the problem quickly, and we discuss customer service and complaints handling further below. Providers may also be able to reduce the frequency of some of these problems by supplying customers with effective information when they provide a new service, for example on the correct set-up and location of the wifi router.

Ofcom's mobile and broadband checker app offers tips on how consumers can improve their internet connection.⁶⁸ We have also published a new consumer guide with practical tips on how to improve broadband speeds along with a new video guide.⁶⁹

⁶⁵ Data from Virgin Media and KCOM did not allow us to accurately identify and reflect the services delivered not working that would allow for meaningful comparisons.

⁶⁶ Ofcom analysis of data provided by Openreach, of services reported as not working within 8 days of services being delivered using the Reseller Identification Codes identified by each provider for their residential services – [see Annex 1](#).

⁶⁷ Based on information supplied to Ofcom by providers.

⁶⁸ Ofcom, [Mobile and broadband checker app](#).

⁶⁹ Ofcom, [Practical tips for improving your broadband speed](#), which includes new video guide.

Providers can make a difference to the time taken to fix faults

When problems originate outside of the home, on the customer's line or wider network, an engineer will usually be needed to address the fault.

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

We have not been able to publish any provider data on the frequency or time taken to repair faults, which we believe would be useful information for consumers,⁷⁰ however, providers will start recording new, comparable faults data in 2019.⁷¹

BT and Post Office (broadband) pay for quicker repairs than other providers using Openreach

All the largest broadband and landline providers in the UK, apart from Virgin Media and KCOM, rely on Openreach engineers to investigate and fix faults with their customers' connections. We estimate that these faults occur approximately every 8 to 9 years for lines carrying standard broadband services, once every 12 years for landline-only services, and once every 7 years for line carrying superfast broadband services.⁷²

When a provider notifies Openreach of a fault on Openreach's network, Openreach must repair it within an agreed time, depending on which service maintenance level (SML) has been purchased, or pay the provider compensation.⁷³ The service levels range from resolution within two working days (level 1) to within six hours (level 4). Retail providers have a choice of which service level to take; one working day is the basic service level for fibre-to-the-cabinet (FTTC) products. In 2017, there was no change in the Openreach repair level that

Openreach repair level used for most residential customers (2017)

<i>One working day repair (level 2)</i>	<i>Two working days repair (level 1)</i>
BT	EE
Post Office (broadband)	Plusnet
	Post Office (landline)
	Sky
	TalkTalk

One working day is the basic service level for fibre-to-the-cabinet products

⁷⁰ This follows a pilot exercise where we found that the data we could obtain from providers on total loss of service would not be sufficiently comparable to include in this report.

⁷¹ The new data collection coincides with the implementation of the voluntary automatic compensation scheme - under which a landline or broadband customers would be entitled to compensation if their service has stopped working and is not fully fixed after two working days.

⁷² Ofcom, 2018, *Quality of Service for WLR, MPF and GEA Statement*, para 4.15.

⁷³ Except for circumstances beyond the reasonable control of Openreach, such as when civil engineering works are required to repair a fault, or where the customer requests a repair appointment beyond the specified timetable (for example because they cannot be available at the time offered).

providers used for most of their residential customers. BT and Post Office (broadband) continued to pay for quicker repairs than other providers using Openreach.

Openreach’s performance for fixing faults within the agreed time improved slightly in 2017.

Figure 9: Comparison of level 1 and 2 faults fixed within agreed timescales, 2016 and 2017

	2016	2017
Level 1 faults fixed within two working days	83%	84%
Level 2 faults fixed within one working day	78%	79%

Source: Openreach⁷⁴

Ofcom has recently raised the quality of service standards applied to Openreach.⁷⁵ Amongst other things, we have introduced a new standard to ensure that the vast majority of repairs are completed within a reasonable timeframe. By 2020/21, Openreach should complete 88% of landline and broadband fault repairs within one to two working days of being notified, compared with 80% in 2017. It will also need to complete 97% of repairs no later than five working days after the date promised. In addition, these standards will now also cover broadband delivered over Openreach’s fibre-to-the street cabinet (FTTC) that are used to provide superfast broadband services.

Missed appointments

When engineers miss an agreed appointment slot, customers may suffer from delays in having their service installed or repaired, as well as from the time they spend waiting in and having to reschedule the appointment.

Different providers use different definitions for missed appointments, making it difficult to draw comparisons across providers.⁷⁶ For this reason, we are not currently able to report on the volume of appointments missed by these engineers by provider. We expect to be able to report on this when we start receiving new data in 2019, under new information gathering powers.

⁷⁴ Openreach, *Regulated KPIs*.

⁷⁵ Ofcom, 2018, *Quality of Service for WLR, MPF and GEA Statement*.

⁷⁶ See [Annex 1](#) for further details.

Openreach has continued to reduce the proportion of appointments that are missed

In 2017, Openreach reduced the proportion of repairs and installation appointments that it missed⁷⁷ compared to 2016.⁷⁸ There is now little difference in the missed appointments rates for these two types of appointment.

Figure 10: Proportion of appointments missed by Openreach, by appointment type, 2017

	2016	2017
Installation	3.6%	1.9%
Repairs ⁷⁹	2.8%	1.8%

Source: Ofcom analysis of provider data

The proportion of appointments missed by Virgin Media remained low

In 2017, Virgin Media missed 0.3% of all engineer appointments.⁸⁰ Figure 11 shows that, as with Openreach, the proportion of appointments missed fell for installations. However, the proportion of appointments that were missed for repairs increased slightly in 2017.

Figure 11: Proportion of appointments missed by Virgin Media, by appointment type

	2016	2017
Installation	0.6%	0.4%
Repairs	0.2%	0.3%

Source: Ofcom analysis of provider data

Customers also miss appointments, causing delays to repairs and installations

There are also instances when appointments are missed by the customer, such as when the customer is not ready when the engineer turns up at the appointment time. For 2017, the proportion of Openreach appointments missed by the customer was 4.5%.⁸¹ For Virgin Media, this proportion was 2.7%. Customers therefore missed a higher proportion of appointments than Openreach and Virgin Media engineers.

⁷⁷ Openreach defines an appointment as missed if the engineer does not arrive during the originally agreed slot or arrives before the agreed slot without the prior agreement of the customer.

⁷⁸ This is based on data from the following providers: BT, EE, Plusnet, TalkTalk, Sky, and Post Office. [See Annex 1](#) for further details.

⁷⁹ These figures exclude Post Office, as they were not able to provide data on the proportion of missed appointments for which the fault was not the customer.

⁸⁰ For the purposes of this report, Virgin Media only class an appointment as missed if it does not take place on the scheduled day.

⁸¹ This excludes appointments booked with other-third party engineers or the provider's own workforce.

Customer service

Phone remains the most popular way for customers to contact their provider

In most instances, customers continue to contact their provider by telephone. In addition, with the exception of EE and Post Office, the main providers can be contacted via webchat and social media for queries relating to fixed landline and broadband services. Contact via social media is mostly limited to Facebook and Twitter, although some providers respond to queries on other social media platforms.

Sky and TalkTalk can also be contacted via message services that do not require the customer to stay connected to the advisor or to respond in real time.⁸² For example, with Sky this involves a customer messaging an advisor via SMS or Facebook Messenger.

Some providers also have apps to support landline and broadband customers

BT, Sky, TalkTalk and Virgin Media each have apps that can be used by landline and broadband customers. The capability of these apps varies across providers, but generally customers can carry out activities such as checking and paying their bill and checking their data usage. In some cases, customers can test their broadband speed, run broadband diagnostics, and report and track faults.

EE's, Post Office's and TalkTalk's customers waited less than one minute on average to speak to their provider on the phone

The average call waiting times were generally higher for landline and broadband customers than for mobile customers.^{83, 84}

There were however variations by provider. Landline and broadband customers calling EE, Post Office or TalkTalk had less than a minute on average to wait to speak to their provider on the phone. Plusnet, however, was the slowest provider to answer the phone, with an average call waiting time of just less than eight minutes.

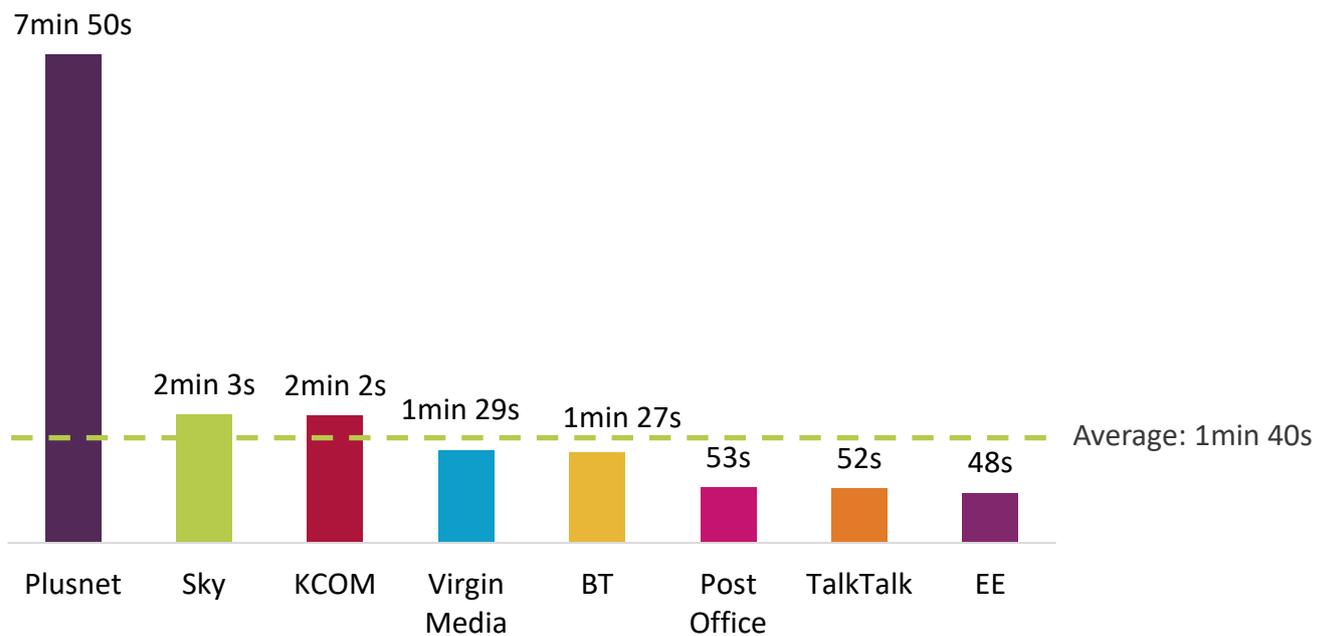
BT was the only provider that offered customers waiting in the call queue the option of receiving a call-back.

⁸² This is also referred to as asynchronous messaging.

⁸³ The average call wait time for mobile customers was just under one minute compared to 1min 40s for landline and broadband customers.

⁸⁴ The data we requested here differed in 2017, and therefore may not be comparable with 2016.

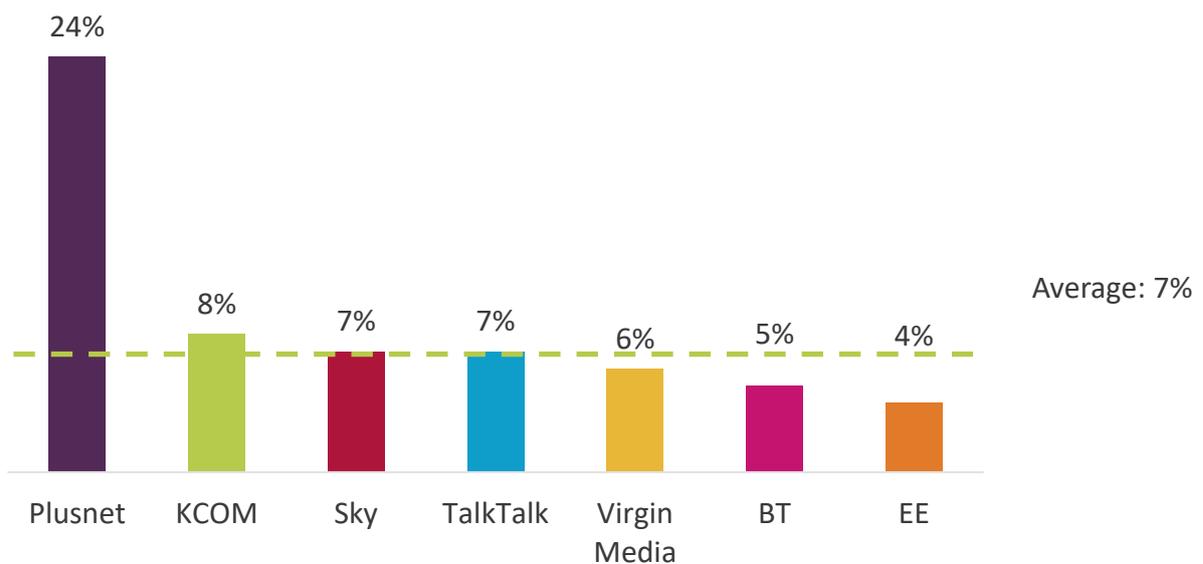
Figure 12: Average call waiting times, landline and broadband providers



Source: provider data, 2017. Note: the BT data includes call-backs.

Plusnet also had the highest proportion of phone calls that ended while the customer was in the queue waiting to speak to an advisor.

Figure 13: Calls ended while the customer was queuing to speak to an advisor, landline and broadband providers



Source: provider data, 2017. Post Office has been excluded from this data set, as they were unable to include instances where the call was ended without the customer hanging up (e.g. due to technical problems), meaning that their data was not comparable with the other providers'.

Reasons to complain and complaints volumes

The proportion of broadband consumers with a reason to complain has increased since 2016

Around one in seven broadband consumers reported that they had a reason to complain⁸⁵ about their provider in the last 12 months,⁸⁶ an increase since 2016.⁸⁷ TalkTalk consumers were more likely than average to have had a reason to complain in the past year.

Figure 14: Proportion of broadband customers who had a reason to complain in the past 12 months, (whether or not they went on to make a complaint), by provider

	Average Broadband	BT	EE	Plusnet	Sky	TalkTalk	Virgin Media
Proportion of consumers with a reason to complain	15% 	14%	14%	13%	14%	18%*	16%

Source: [Ofcom Quality of customer service research](#), face-to-face omnibus survey, fieldwork carried out by Kantar Media, January 2018.

Base: All UK households 16+; average broadband (5171), BT (5391), EE (214), Plusnet (175), Sky (1189), TalkTalk (659) and Virgin Media (1242)

Q. Have you personally had a reason to complain about any of these services or suppliers in the last 12 months, whether or not you went on to make a complaint?

Red or green shading and * indicates significantly lower/higher than the sector average at the 95% confidence level. Arrows represent a significant increase or decrease compared to 2016.⁸⁸

The most common reason to complain was the broadband service not performing as it should

Of those with a reason to complain, the main cause was a service issue, such as slow broadband speeds, complete or intermittent loss of service or service not as advertised.⁸⁹ The next most common causes were a billing or pricing issue, and a problem with a repair to the service.

⁸⁵ This is regardless of whether or not they went on to make a complaint.

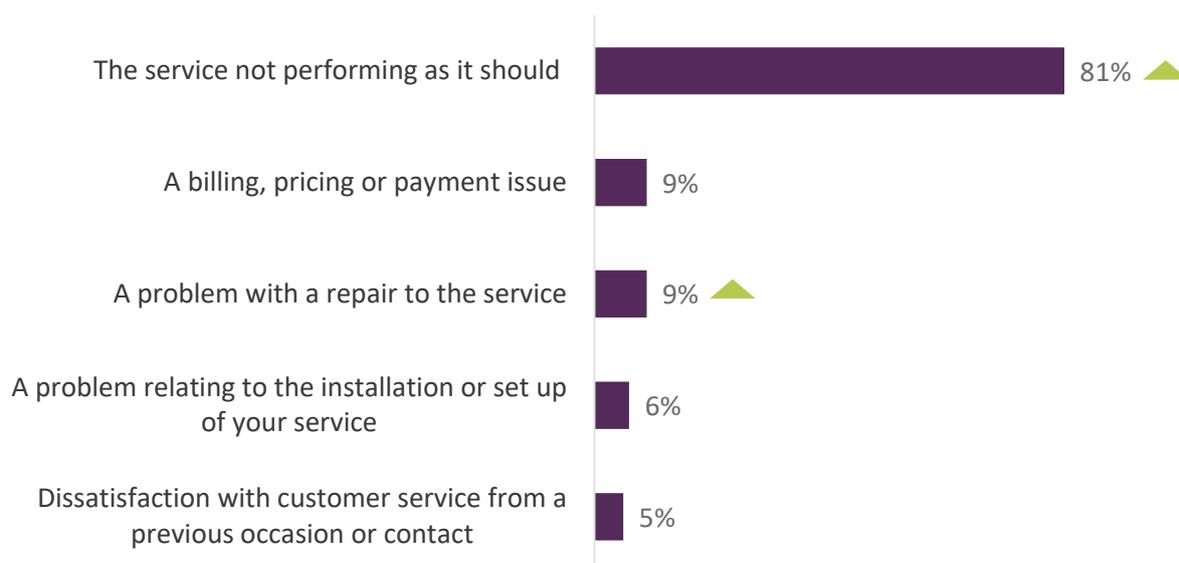
⁸⁶ Fieldwork was conducted in January 2018, therefore reasons to complain date back to January 2017.

⁸⁷ The proportion of broadband customers with a reason to complain has increased from 13% to 15%.

⁸⁸ Ofcom, 2018, [Reasons to complain study](#); Ofcom, 2016, [Reasons to Complain data tables](#).

⁸⁹ This has increased to 81%, up from 73% in 2016.

Figure 15: Reasons to complain about broadband provider



Source: [Ofcom Quality of customer service research](#), face-to-face omnibus survey, fieldwork carried out by Kantar Media, January 2018.

Base: All UK households 16+ who had a reason to complain about broadband (764)

Q. What was the issue/s you had reason to complain about in connection with your fixed broadband internet?

Arrows represent a significant increase or decrease compared to 2016

The proportion of landline consumers with a reason to complain has fallen since 2016

Only four percent of landline consumers had a reason to complain in 2017, which represents a fall since 2016 (5%). Sky consumers were less likely than average to have had a reason to complain.⁹⁰

Figure 16: Proportion of landline customers who had a reason to complain in the past 12 months⁹¹

	Average landline	BT	EE	Plusnet	Post Office	Sky	TalkTalk	Virgin Media
Proportion of consumers with a reason to complain	4% ▼	4%	3%	4%	7%	2%* ▼	5%	4%

Source: [Ofcom Quality of customer service research](#), face-to-face omnibus survey, fieldwork carried out by Kantar Media, January 2018.

Base: All UK households 16+; average landline (5227), BT (2042), EE (181), Plusnet (132), Post Office (85), Sky (964), TalkTalk (607) and Virgin Media (1021)

Q. Have you personally had a reason to complain about any of these services or suppliers in the last 12 months, whether or not you went on to make a complaint?

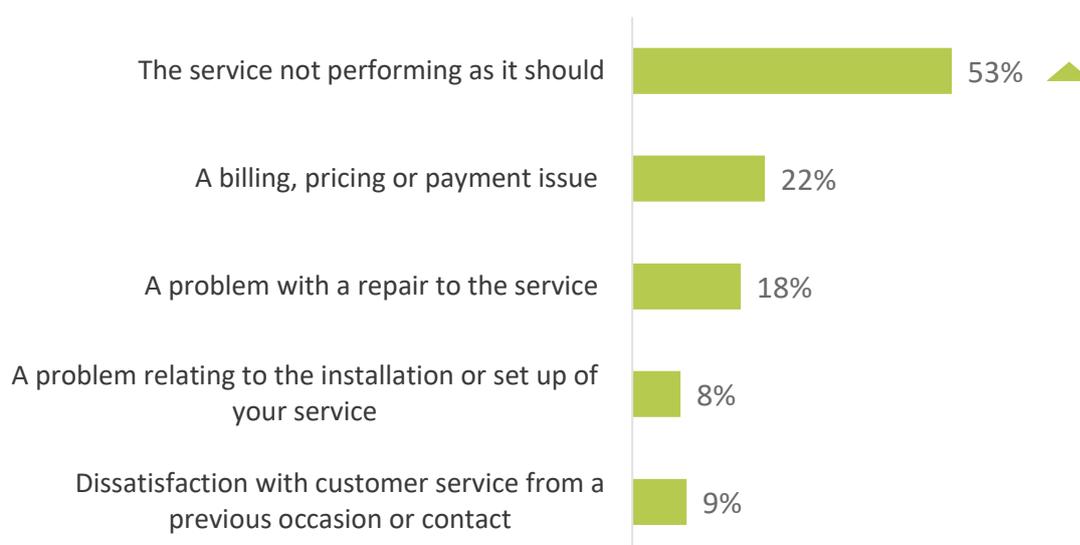
⁹⁰ All other apparent differences are not statistically significant.

⁹¹ Whether or not they went on to make a complaint.

Red or green shading and * indicates significantly lower/higher than the sector average at the 95% confidence level. Arrows represent a significant increase or decrease compared to 2016

Of the small proportion of landline customers with a reason to complain, the main cause was a service issue, such as poor line quality or voicemails delivered late.⁹² The next most common cause to complain was a billing pricing or payment issue, followed by a problem with a repair to the service.

Figure 17: Reasons to complain about landline provider



Source: [Ofcom Quality of customer service research](#), face-to-face omnibus survey, fieldwork carried out by Kantar Media, January 2018.

Base: All UK households 16+ who had a reason to complain about landline (210)

Q. What was the issue\|s you had reason to complain about in connection with your home landline?

Arrows represent a significant increase or decrease compared to 2016

Sky generated the lowest number of broadband complaints to Ofcom per 100,000 subscribers

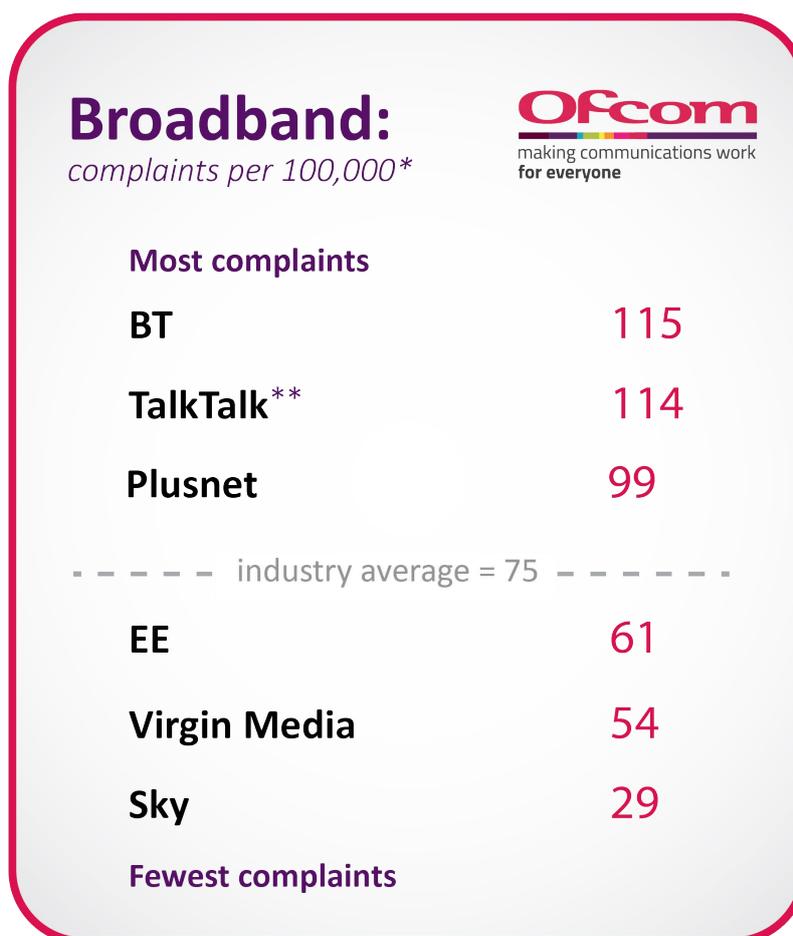
Some customers contact Ofcom to complain about their broadband provider. Ofcom reports on the total number of complaints generated by the main broadband providers each quarter.⁹³

For 2017, Sky generated the lowest number of complaints to Ofcom per 100,000 subscribers whereas BT generated the highest number of complaints.

⁹² This has increased from 40% in 2016 to 53% in 2017.

⁹³ Further information about how we compile our complaints data can be found in our most recent quarterly report publication: Ofcom, [Telecoms and pay-TV complaints data](#).

Figure 18: Broadband complaints to Ofcom per 100,000 subscribers in 2017⁹⁴



*All figures rounded to nearest whole number. Industry average is limited to those providers included in the report. Source: Ofcom, CCT data

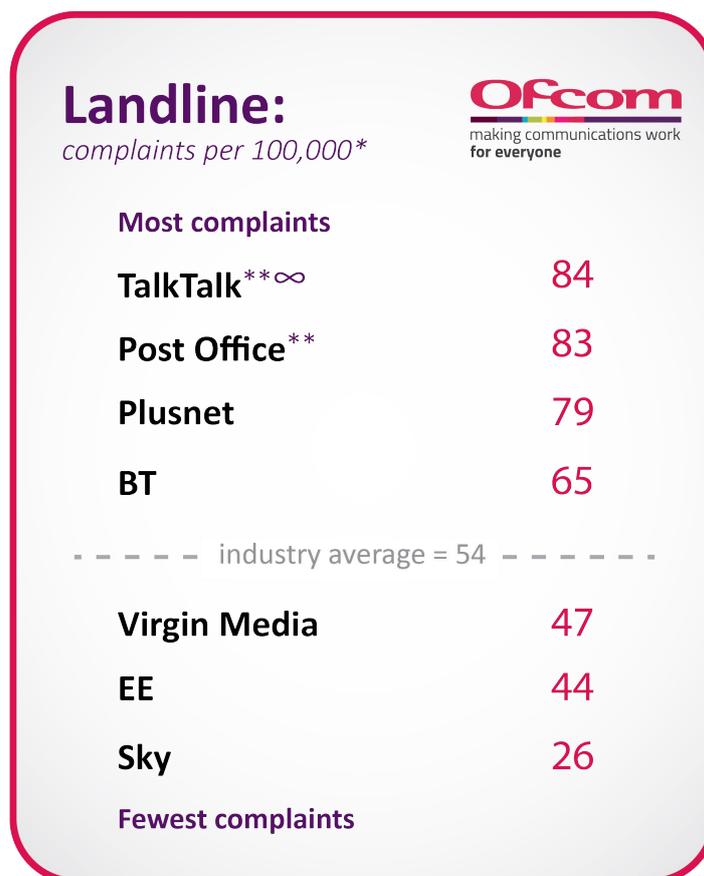
**TalkTalk's broadband complaints to Ofcom per 100,000 subscribers was adjusted from 113 to 114 on 30 April 2019.

Sky also generated the lowest number of landline complaints to Ofcom per 100,000 subscribers

For landline services, Sky generated the lowest number of complaints to Ofcom per 100,000 subscribers, whereas TalkTalk and Post Office generated the highest number of complaints in 2017.

⁹⁴ We have normalised complaints figures using the average of the quarterly subscriber figures across the year. This is a change from the methodology used to calculate the 2016 complaints data and therefore we cannot make any comparisons between 2016 and 2017 data.

Figure 19: Landline complaints to Ofcom per 100,000 subscribers in 2017⁹⁵



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

** The actual measurable difference between TalkTalk and Post Office's landline complaints per 100,000 is less than one and so results should be considered comparable.

∞ TalkTalk's landline complaints to Ofcom per 100,000 subscribers was adjusted from 83 to 84 on 30 April 2019

Complaints handling⁹⁶

Satisfaction with complaints handling in the broadband markets has decreased since 2016

Complaints handling is a crucial part of customer service. Unless providers respond effectively to dissatisfied customers, issues can become drawn-out and any harm can increase. Ofcom requires providers to have in place transparent, accessible and effective complaints handling procedures.⁹⁷

When asked, half of broadband customers who complained to their provider said they were satisfied with how their complaint was handled, a fall compared to 2016.⁹⁸ This decline has mainly been

⁹⁵ We have normalised complaints figures using the average of the quarterly subscriber figures across the year. This is a change from the methodology used to calculate the 2016 complaints data and therefore we cannot make any comparisons between 2016 and 2017 data.

⁹⁶ In the Quality of customer service – complaints research 'average' refers to the average of the providers included in the survey (see table).

⁹⁷ Ofcom, [The Ofcom Approved Code of Practice for Complaints Handling](#).

⁹⁸ 56% of broadband customers said they were satisfied with complaints handling in 2016.

driven by a decrease in satisfaction with providers' handling of service issue complaints,⁹⁹ such as slow broadband speeds, complete or intermittent loss of service or service not as advertised.

EE and Sky had high satisfaction with broadband complaints handling

Both Sky and EE ranked higher than average for overall satisfaction with complaints handling, while TalkTalk ranked lower than average.

Figure 20: Broadband – overall satisfaction with complaint handling



Source: [Ofcom Quality of customer service – complaints research](#), online survey, fieldwork carried out by BDRC, December 2017/January 2018

Q. Overall, how satisfied are you with the service you received from [provider] customer services with regard to the complaint that you had?

Base: All who complained about the broadband service in past 6 months (3396), BT (717), EE (291), Plusnet (266), Sky (720), TalkTalk (598), Virgin Media (804).

Red or green shading and * indicates significantly lower/higher than the sector average at the 95% confidence level. Arrows indicate an increase or decrease compared to 2016. No 2016 data for Plusnet.¹⁰⁰

These findings were also reflected in customer satisfaction with providers' customer service during the complaints handling process, with Sky and EE ranking higher than average across a number of factors, while TalkTalk ranked lower than average across each factor.

⁹⁹ Satisfaction with service issue complaints was 45% compared to 52% in 2016.

¹⁰⁰ Plusnet was added to the 2017/18 survey as it reached the 4% market share inclusion criteria.

Figure 21: Broadband – satisfaction with specific aspects of customer service measured

Satisfaction with specific aspects of customer service:	Average Broadband	BT	EE	Plusnet	Sky	TalkTalk	Virgin Media
Ease of finding provider contact details	63%	62%	64% ▲	69%	65%	57%*	65%
Ease of getting through to the right person (PHONE)	50%	50% ▲	66%* ▲	44%	55%*	39%*	50%
Time taken to handle issue	46% ▼	45% ▼	55%*	44%	52%*	37%* ▼	44% ▼
Getting issue resolved to your satisfaction	49% ▼	49% ▼	58%*	48%	57%*	40%* ▼	47% ▼
Courtesy and politeness of advisors	65%	65%	70% ▲	69%	71%*	55%* ▼	62% ▼
Advisor doing what they said they would do	55% ▼	54%	62%*	60%	62%* ▼	45%* ▼	54% ▼
Logging of query details to avoid having to repeat yourself	49% ▼	51% ▼	56%*	55%	58%* ▼	39%* ▼	43%* ▼
Offering compensation or goodwill payment	36% ▼	38% ▼	46%*	26%*	42%* ▼	30%* ▼	33% ▼
Willingness to help resolve your issue	58% ▼	58%	64%	62%	65%*	47%* ▼	55% ▼

Source: *Ofcom Quality of customer service – complaints research*, online survey, fieldwork carried out by BDRC, December 2017/January 2018

Q. And how satisfied were you with the following aspects of [provider]'s customer service?

Base: All who complained about the broadband service in past 6 months (3396), BT (717), EE (291), Plusnet (266), Sky (720), TalkTalk (598), Virgin Media (804).

Red or green shading and * indicates significantly lower/higher than the sector average at the 95% confidence level. Arrows indicate an increase or decrease compared to 2016. No 2016 data for Plusnet.

Around half of broadband complaints were completely resolved

Consumers reported that around half of their broadband complaints were completely resolved by their provider; this proportion was higher for EE and Sky and lower for TalkTalk. Just over a third of all complaints were completely resolved on the first contact with provider; this was higher for Sky and lower for TalkTalk.

Figure 22: Broadband – proportion of complaints completely resolved and resolved on first contact

	Average Broadband	BT	EE	Plusnet	Sky	TalkTalk	Virgin Media
Proportion of complaints completely resolved	49% ▼	51% ▼	57%*	47%	53%*	37%* ▼	49% ▼
Proportion of complaints resolved on first contact	35%	36%	40%	34%	41%*	25%*	33%

Source: *Ofcom Quality of customer service – complaints research*, online survey, fieldwork carried out by BDRC, December 2017/January 2018

Q. In your opinion, was [provider] able to successfully resolve your complaint? Q. You said that your complaint was completely resolved, was it completely resolved on your first contact with PROVIDER?

Base: All who complained about the broadband service in past 6 months (3396), BT (717), EE (291), Plusnet (266), Sky (720), TalkTalk (598), Virgin Media (804).

Red or green shading and * indicates significantly lower/higher than the sector average at the 95% confidence level. Arrows indicate an increase or decrease compared to 2016. No 2016 data for Plusnet. No 2016 data for proportion of complaints resolved on first contact.¹⁰¹

Satisfaction with the handling of landline complaints has also fallen

Just over half (53%) of landline customers who complained to their provider said they were satisfied with how their complaint was handled, a decline compared to 2016.¹⁰² Again this has mostly been driven by a decrease in satisfaction with handling of service issue complaints, such as poor line quality or voicemails delivered late.¹⁰³

Sky had high satisfaction for landline complaints handling

In 2017, Sky ranked higher than average overall for customer satisfaction with landline complaints handling, while TalkTalk ranked lower.

Figure 23: Landline – overall satisfaction with complaints handling

	Average Landline	BT	Sky	TalkTalk	Virgin Media
Overall satisfaction with complaint handling	53% ▼	53% ▼	58%* ▼	44%* ▼	53%

Source: [Ofcom Quality of customer service – complaints research](#), online survey, fieldwork carried out by BDRC, December 2017/January 2018

Q. Overall, how satisfied are you with the service you received from [provider] customer services with regard to the complaint that you had?

Base: All who complained about the landline service in past 6 months (2002), BT (579), Sky (500), TalkTalk (420), Virgin Media (503).

Red or green shading and * indicates significantly lower/higher than the sector average at the 95% confidence level. Arrows indicate an increase or decrease compared to 2016.

These findings were also reflected in customer satisfaction with different aspects of providers' customer service during the complaints handling process; Sky ranked higher than average across five factors, while TalkTalk ranked lower than average across eight factors.

¹⁰¹ This question was new to the 2017/18 research.

¹⁰² Down from 62% in 2016.

¹⁰³ 52% in 2017 vs. 66% in 2016.

Figure 24: Landline – satisfaction with specific aspects of customer service measured

Satisfaction with specific aspects of customer service:	Average Landline	BT	Sky	TalkTalk	Virgin Media
Ease of finding provider contact details	62%	62%	64%	52%*	65%
Ease of getting through to the right person (PHONE)	49%	50%	53% ▼	42%	46%
Time taken to handle issue	51% ▼	50% ▼	58%*	43%* ▼	50% ▼
Getting issue resolved to your satisfaction	54% ▼	56% ▼	58%	45%* ▼	52%
Courtesy and politeness of advisors	64%	65%	67%	54%* ▼	64%
Advisor doing what they said they would do	58% ▼	57%	66%*	46%* ▼	58%
Logging of query details to avoid having to repeat yourself	54% ▼	54% ▼	62%*	43%* ▼	51% ▼
Offering compensation or goodwill payment	47% ▼	46% ▼	55%*	40%* ▼	43% ▼
Willingness to help resolve your issue	59% ▼	58% ▼	65%*	47%* ▼	60%

Source: *Ofcom Quality of customer service – complaints research*, online survey, fieldwork carried out by BDRC, December 2017/January 2018

Q. And how satisfied were you with the following aspects of [provider]'s customer service?

Base: All who complained about the landline service in past 6 months (2002), BT (579), Sky (500), TalkTalk (420), Virgin Media (503).

Red or green shading and * indicates significantly lower/higher than the sector average at the 95% confidence level. Arrows indicate an increase or decrease compared to 2016.

Almost three in five landline complaints were completely resolved

Customers reported that almost three in five of all landline complaints were completely resolved by their provider in 2017; however, the proportion was lower for TalkTalk.

Customers also reported that just less than half of all landline complaints were completely resolved on the first contact with provider; again the proportion for TalkTalk was lower compared to the average.

Figure 25: Landline – proportion of complaints completely resolved and resolved on first contact

	Average Landline	BT	Sky	TalkTalk	Virgin Media
Proportion of complaints completely resolved	57% ▼	60% ▼	57%	47%* ▼	56%
Proportion of complaints resolved on first contact	45%	48%	46%	34%*	43%

Source: [Ofcom Quality of customer service – complaints research](#), online survey, fieldwork carried out by BDRC, December 2017/January 2018

Q. In your opinion, was [provider] able to successfully resolve your complaint? Q. You said that your complaint was completely resolved, was it completely resolved on your first contact with PROVIDER?

Base: All who complained about the landline service in past 6 months (2002), BT (579), Sky (500), TalkTalk (420), Virgin Media (503).

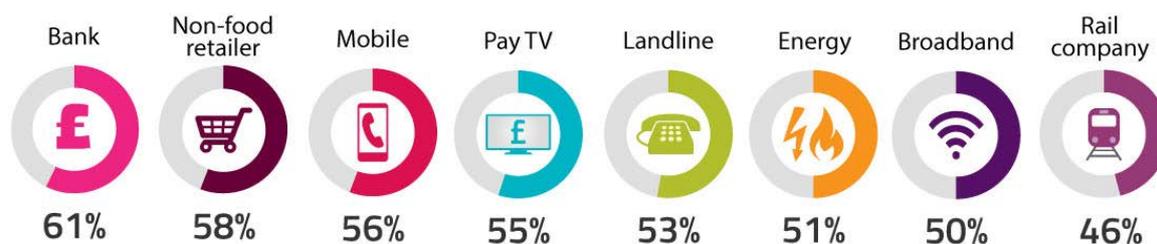
Red or green shading and * indicates significantly lower/higher than the sector average at the 95% confidence level. Arrows indicate an increase or decrease compared to 2016. No 2016 data for proportion of complaints resolved on first contact.

Satisfaction with complaint handling in other sectors

The level of overall satisfaction with broadband complaint handling was in line with the energy and rail sectors, but lower than the bank and non-food retail sectors.

The level of overall satisfaction with landline complaint handling was in line with the energy, rail and non-food retail sectors, but lower than the bank sector.

Figure 26: Overall satisfaction with complaint handling in communications, energy, bank, non-food retail and rail sectors



Source for landline, mobile, broadband and pay TV: [Ofcom Quality of customer service – complaints research](#), online survey, fieldwork carried out by BDRC, December 2017/January 2018

Q. Overall, how satisfied are you with the service you received from [provider] customer services with regard to the complaint that you had?

Base: All who complained about each service in past 6 months: Landline (2002), Mobile (2856), Broadband (3396), Pay TV (1824). Source for energy, bank, rail company and non-food retailer: Ofcom complaint handling benchmarking survey - online survey, fieldwork carried out by Populus, 6 – 7 December

Q. Overall, how satisfied are you with the service you received from [provider's] customer services with regard to the complaint that you had?

Base: All who complained about each service in the past 6 months: energy (223), bank (210), non-food retailer (395) and rail company (172).

Complaints taken to an alternative dispute resolution scheme

Service quality was the most common type of broadband complaint taken to an alternative dispute resolution scheme

If a customer believes their provider has not dealt with a complaint properly, they can escalate it to the appropriate alternative dispute resolution (ADR) scheme. There are two schemes that handle broadband and landline complaints,¹⁰⁴ both of which have recently published data summarising the complaints they received between October and December 2017, broken down by provider. This information can be found on their respective websites.¹⁰⁵

For broadband services, service quality (for example, loss of service, disconnections and broadband speeds) and billing were the most common types of complaint made to the ADR schemes.

Figure 27: Most common type of complaints made to ADR schemes for the largest broadband providers (Q4, 2017)

	Most Common	Second Most Common
BT	Service Quality (41%)	Billing (21%)
EE	Service Quality (49%)	Billing (19%)
Plusnet	Service Quality (42%)	Billing (19%)
Sky	Service Quality (38%)	Billing (19%)
TalkTalk	Service Quality (42%)	Contract Issues (13%)
Virgin Media	Contract Issues (23%)	Billing (21%), Service Quality (21%)

Source: CISAS and OS data

Over 70 percent of broadband complaints considered by the ADR schemes were found in favour of the consumer or settled

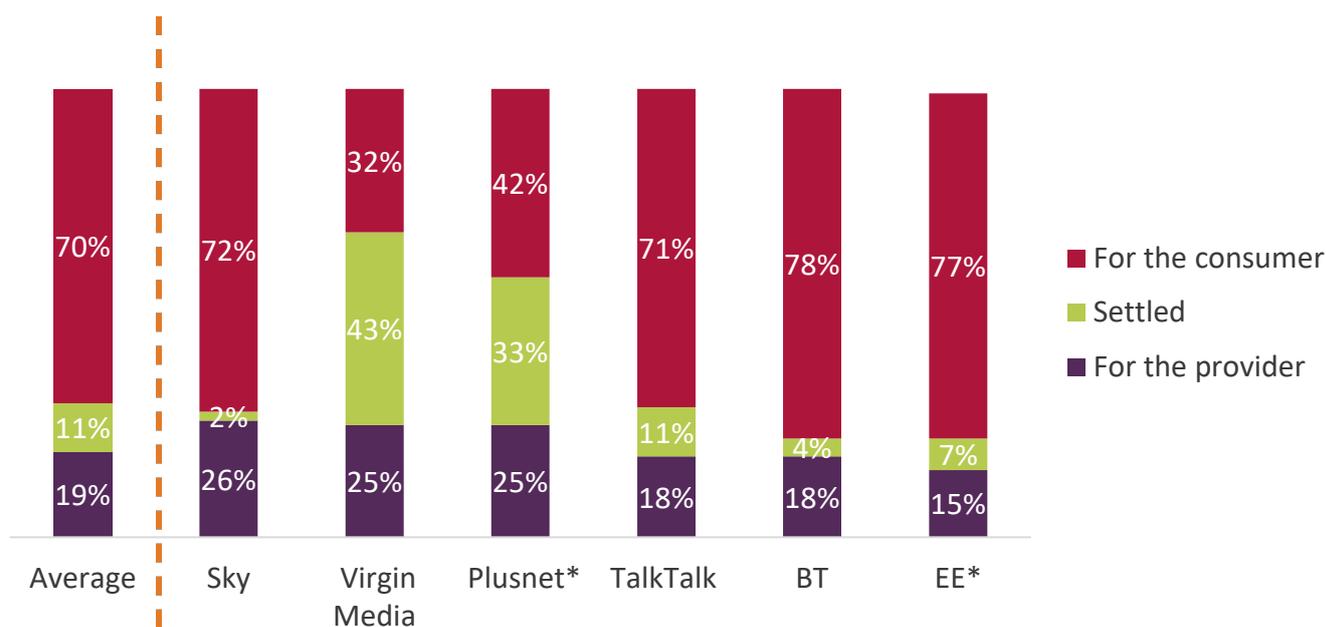
BT and EE had the highest proportion of complaints found in favour of the consumer,¹⁰⁶ whereas Virgin Media had the lowest. Virgin Media and Plusnet settled a much larger proportion of complaints than the other providers.

¹⁰⁴ Ofcom currently approves two ADR schemes in communications: Ombudsman Services: Communications (OS) and Communication and Internet Services Adjudication scheme (CISAS). Our most recent review is: Ofcom, 2017, [Review of Ofcom's approval of Alternative Dispute Resolution Schemes](#).

¹⁰⁵ [OS website](#) and [CISAS website](#).

¹⁰⁶ ADR schemes will investigate a complaint if it is within their terms of reference, and will then allocate the outcome to the following categories: for the provider - these are cases that are found entirely in favour of the communications provider, with nothing going to the consumer; settled - these are cases resolved with the agreement of both the communications provider and the consumer without the need for an investigation; and for the consumer - these are cases where any part of the complaint is found in favour of the customer.

Figure 28: ADR case outcomes for the largest broadband providers (Q4, 2017)



Source: CISAS and OS data. Some figures do not sum to 100% due to rounding. Those marked * have a low base size.

Service quality was the most common type of landline complaint taken to an ADR scheme

For landline services, service quality (for example, loss of service and disconnections) and billing were the most common types of complaints made to the ADR schemes for the main landline providers.¹⁰⁷

Figure 29: Most common type of complaints made to ADR schemes for the largest landline providers (Q4, 2017)

	Most Common	Second Most Common
BT	Service Quality (33%)	Billing (27%)
EE	Service Quality (49%)	Billing (20%)
Plusnet	Service Quality (33%)	Billing (23%)
Post Office	Contract Issues (35%)	Service Quality (28%)
Sky	Service Quality (35%)	Billing (22%)
TalkTalk	Service Quality (35%)	Contract Issues (15%)
Virgin Media	Contract Issues (25%)	Billing (20%)

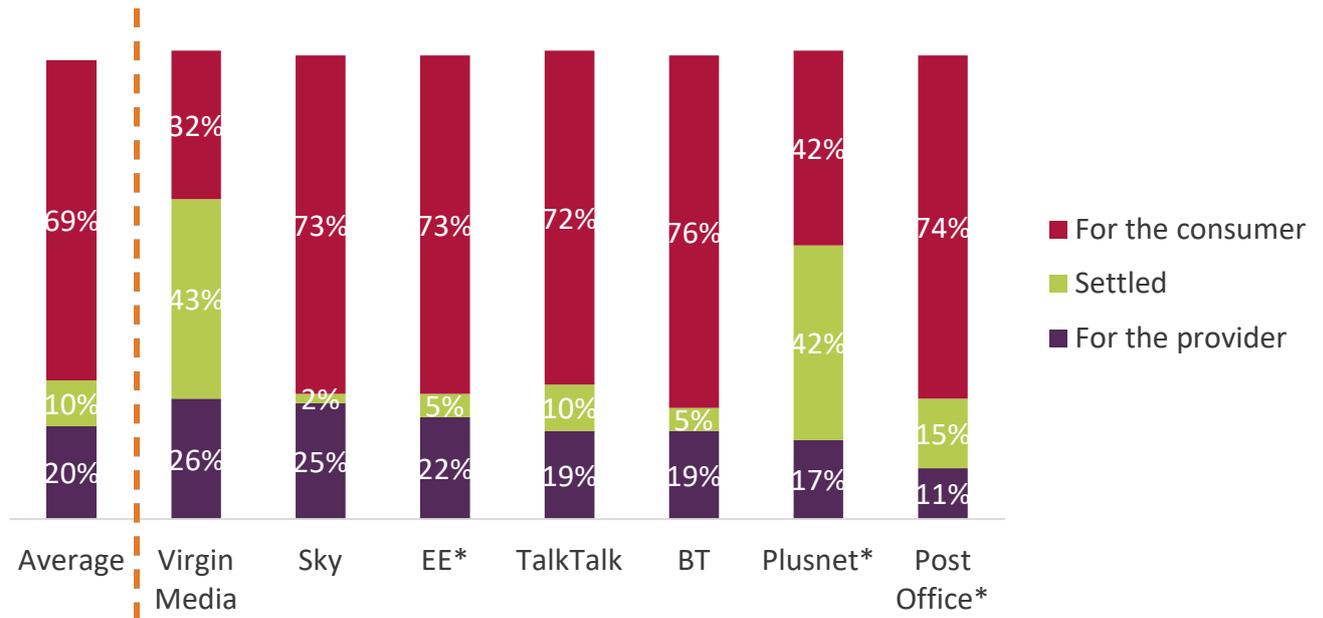
Source: CISAS and OS data

¹⁰⁷ Both schemes log one case per service. That means that each case logged may include a number of different complaints relating to the same service (for example, a consumer may complain about their bill, but also their provider's customer service in relation to their broadband service). Both schemes allocate each case to a single category of complaint according to what they perceive to be the main issue raised by the complainant.

Over three quarters of landline complaints considered by the ADR schemes were found in favour of the consumer or settled

BT had the highest proportion of complaints found in favour of the consumer, whereas Virgin had the lowest. Virgin Media and Plusnet settled a much larger proportion of complaints than the other providers.

Figure 30: ADR case outcomes for the largest landline providers (Q4, 2017)



Source: CISAS and OS data. Chart only includes providers with a market share over 1.5%. Providers with OS: BT, EE, Plusnet (from 21 November 2017, with CISAS before) and Sky (with CISAS from 1 February 2018). Providers with CISAS: TalkTalk (from 1 October 2017, with OS before) and Virgin. Some figures do not sum to 100% due to rounding. Those marked * have a low base size.



Residential mobile services

Overview

This section explores the service quality experienced by consumers using mobile services in 2017,¹⁰⁸ including:

- **Overall satisfaction** - how satisfied customers were with their service, and whether they would recommend their provider to a friend.
- **Customer service** – consumers’ experience of contacting providers.
- **Reasons to complain and complaints volumes** – whether consumers had a reason to complain and how many consumers complained to Ofcom.
- **Satisfaction with complaints handling** – how effectively providers dealt with and resolved complaints.
- **Complaints taken to an alternative dispute resolution scheme** – whether complaints against providers were upheld by an alternative dispute resolution scheme.

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

¹⁰⁸ The fieldwork for the Customer Satisfaction Survey was conducted from 3rd January to 15th February 2018.

Overall satisfaction

Customer satisfaction with their mobile service remains very high

Just over nine in ten mobile customers reported that they were satisfied with the overall service they received;¹⁰⁹ this has not changed since 2016. Where customers were dissatisfied, the two main causes were poor reception or coverage, and the mobile service being too expensive or not good value for money.

More than eight in ten customers were satisfied with the reception or signal strength when using their mobile service, which is in line with 2016,¹¹⁰ however, satisfaction was lower in rural areas (69%), compared to urban areas (86%). Ofcom will shortly be publishing a report with the results of our Consumer Mobile Experience research, which measures the consumer experience of using mobile services on Android phones.

Figure 31: Satisfaction with mobile phone provider^{111, 112}

	Average mobile	EE	giffgaff	O2	Tesco Mobile	Three	Virgin Mobile	Vodafone
Satisfaction with overall service	91%	93%	98%*	92%	97%*	89%	86%*	88%*
Satisfaction with reception or signal strength	84%	83%	91%	83%	88%	82%	86%	84%

Source: *Ofcom Customer Satisfaction Tracker survey 2018*

Base: All adults aged 16+ who are the decision maker and express an opinion on their mobile phone service.

Base sizes are variable. See data tables for more information.

Providers used by fewer than 100 respondents are not shown individually but are included in the average; unless otherwise stated. 'Don't know' responses have been excluded from the base.

Red or green shading and * indicates significantly lower/higher than the sector average at the 95% confidence level. Arrows represent a significant increase or decrease compared to 2016

Of the main mobile providers, giffgaff and Tesco Mobile ranked highly for overall satisfaction in the mobile market

Compared to the mobile market average, giffgaff and Tesco Mobile scored higher than average for overall satisfaction, while Virgin Mobile and Vodafone ranked lower than average.

¹⁰⁹ Data tables can be found [here](#) and a slide pack of key results can be found [here](#).

¹¹⁰ Question wording change since 2016. In 2016 the question was: "How satisfied are you with the RECEPTION or EASE OF ACCESSING the (MOBILE PHONE NETWORK) network?". In 2018 the question was: how satisfied are you overall with the reception or signal strength that you get on your mobile phone service from (YOUR MOBILE PHONE SERVICE PROVIDER)?".

¹¹¹ Satisfaction measures for 2016 are not available for giffgaff, as sample size for giffgaff was not large enough in the 2016 research study

¹¹² Tesco Mobile and giffgaff deliver their services over the same network as O2. Virgin Mobile delivers their services over the same network as EE.

Similarly, giffgaff and Tesco Mobile customers were more likely than average to recommend their provider

We asked mobile customers how likely they would be to recommend their mobile provider to a friend.¹¹³

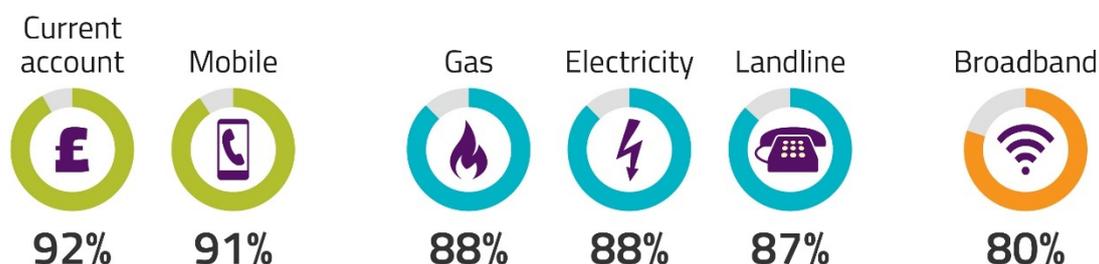
Giffgaff and Tesco Mobile customers were more likely than average to say they would recommend their provider to a friend.¹¹⁴ In contrast, Vodafone and Virgin Mobile customers were less likely than average to say they would do so.

Recommend to a friend: Mobile providers	
More likely to recommend	giffgaff · Tesco Mobile
Mobile average	EE · O2 · Three
Less likely to recommend	Vodafone · Virgin Mobile

Overall satisfaction in the mobile market was in line with, or above, that in other sectors

Mobile customers’ satisfaction with the overall service they received from their provider was comparable to overall satisfaction levels among current account customers and above the levels seen for gas and electricity, landline and broadband customers.

Figure 32: Customers’ overall satisfaction with communications providers compared to current account and energy providers



Source: *Ofcom Customer Satisfaction Tracker survey 2018*

L1/M2/IN2/PT1/B1/BM3/BM9/BM10: 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 their landline service(2252), their mobile phone service (2861), their fixed broadband service (2263), their pay TV service (1487), their services taken with the same supplier (2182), their main current account provider (2867), their gas provider (2212), their electricity provider (2536). ‘Don’t know’ responses have been excluded from the base

¹¹³ This is the Net Promoter Score™ (NPS™), see [Annex 2](#) for further details. Full results can be found in the data tables [here](#) and slide pack [here](#).

¹¹⁴ Based on the global NPS standards, any score above 0 is considered “good”, 50 and above is considered excellent. The average ‘recommend to a friend’ score in the mobile market was good (22). This is higher than for landline and fixed broadband services. Giffgaff and Tesco Mobile had “excellent” scores, while all other mobile providers had “good” scores. See [Annex 2](#) for further details.

Customer service¹¹⁵

Phone remains the most popular way for customers to contact their provider

Providers offer a range of means by which customers can contact them, including phone and webchat. While most providers have a phone service for their customers to contact them, giffgaff does not, and instead offers an online support service and member forum.¹¹⁶

All the main providers respond to social media enquiries (primarily Twitter and Facebook), and in addition they all offer customers the option of using an app. Customer take-up of the app varies; some providers reported only a small minority of their customers using the app, while others have 25-45% of their customers using the app.¹¹⁷ The capabilities of these apps vary from providing simple information about allowances, to top-up/upgrade facilities, to a way of accessing live chat with their provider. However, most customers still prefer to contact their provider by telephone.

BT Mobile customers waited the shortest amount of time before speaking to their provider on the phone¹¹⁸

In 2017, the average time that customers spent waiting in a telephone queue before speaking to an advisor was 58 seconds. The 2017 average call waiting times were generally lower for mobile customers than for landline and broadband customers, where the average wait time was 1 minute 40s.¹¹⁹ Of the mobile providers, BT Mobile had the shortest and O2 the longest wait times.

BT Mobile offered customers waiting in the call queue the option of receiving a call-back from an advisor.

¹¹⁵ The data requested here differed in 2017, and therefore may not be comparable with 2016.

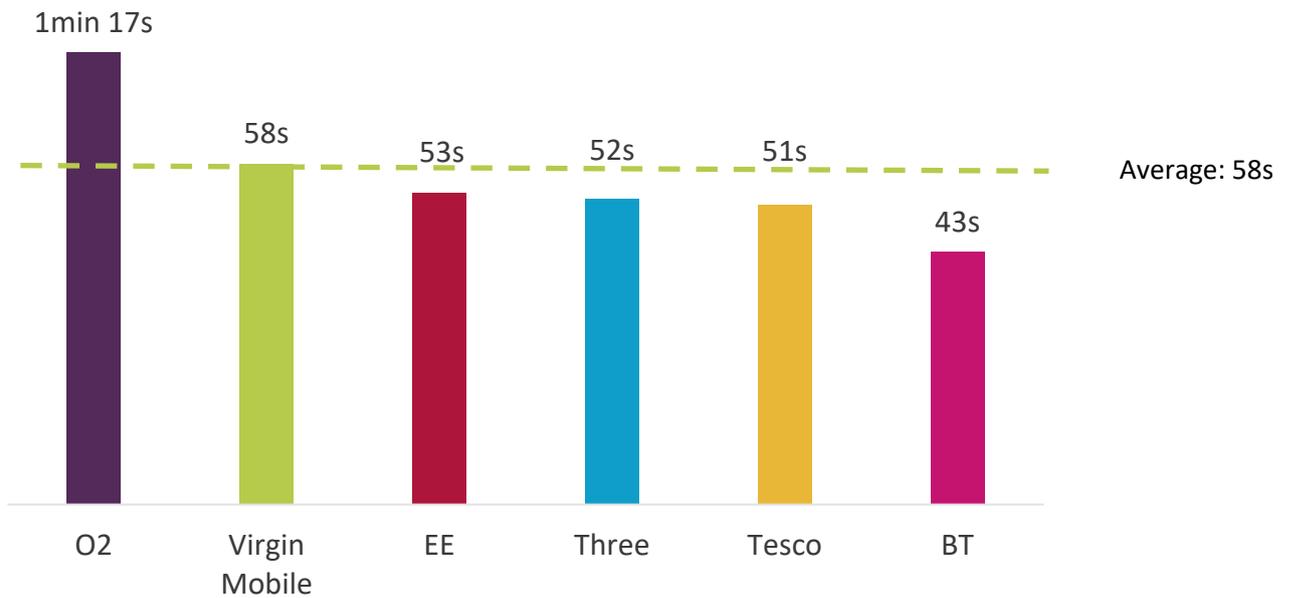
¹¹⁶ They are therefore not included in the call metrics below.

¹¹⁷ Active users, based on those who used the app during Q4 2017, as a percentage of the provider's overall residential mobile subscriber base

¹¹⁸ Vodafone has been excluded because they were unable to include transfers as separate calls in the data that they gave us. As such, their data is not comparable with the other providers.

¹¹⁹ Ofcom analysis of provider data. More information on how Ofcom derived this and other metrics from provider data can be found at [Annex 1](#).

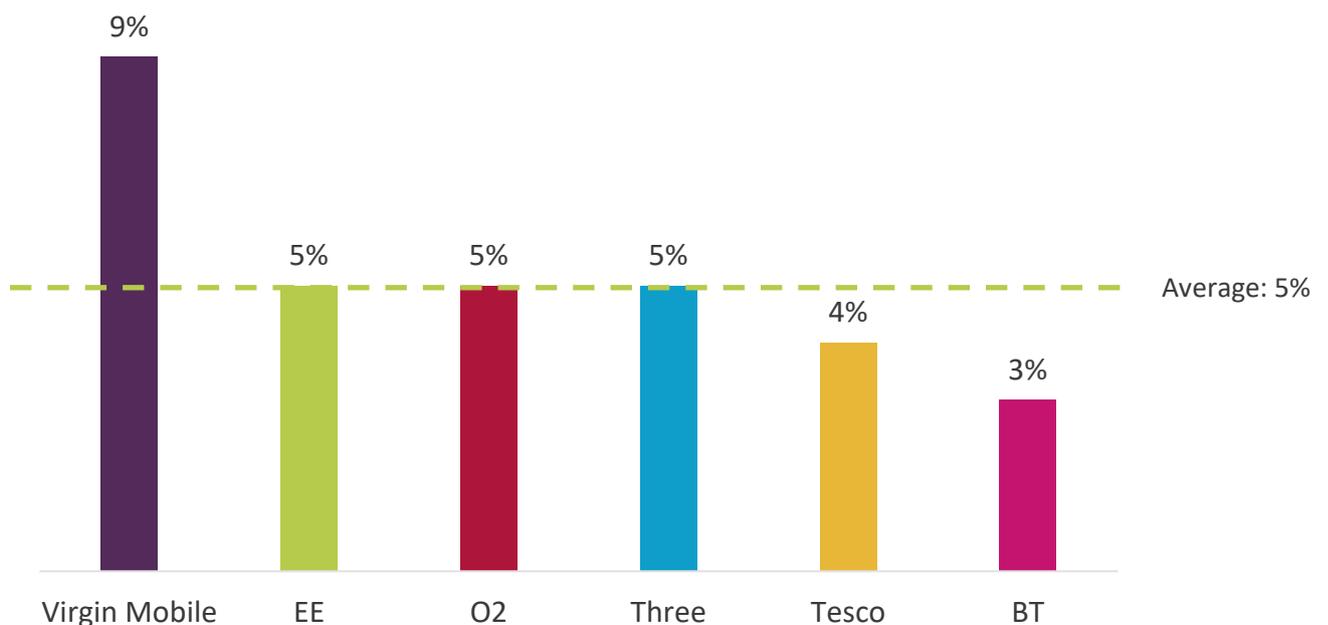
Figure 33: Average call waiting time, mobile providers



Source: provider data, 2017. Note: the BT data includes call-backs.

On average, five percent of calls ended while the customer was still in the queue waiting to speak to an advisor, though the proportion was higher for Virgin Mobile. This is slightly lower than fixed line customer experiences, where the average rate was seven per cent.

Figure 34: Calls ended while the customer was queuing to speak to an advisor, mobile providers



Source: provider data, 2017. As above, Vodafone has been excluded because they were unable to include transfers as separate calls in the data that they gave us. As such, their data is not comparable with the other providers.

Reasons to complain and complaints volumes

A small minority of mobile consumers had a reason to complain in 2017

Four percent of mobile consumers reported that they had a reason to complain¹²⁰ about their provider in the last 12 months,¹²¹ which is the same as in 2016.

EE and giffgaff mobile customers were less likely than average to have had a reason to complain

In 2017, giffgaff and EE customers were less likely than average to have had a reason to complain in the past year, while Vodafone customers were more likely.

Figure 35: Proportion of customers who had a reason to complain in the past 12 months¹²²

	Average mobile	EE	giffgaff	Lycamobile	O2	Tesco Mobile	Three	Virgin Mobile	Vodafone
Proportion of consumers with a reason to complain	4%	2%* ▼	1%*	4%	3%	3%	3%	4%	7%*

Source: *Ofcom Quality of customer service research*, face-to-face omnibus survey, fieldwork carried out by Kantar Media, January 2018.

Base: All UK households 16+; average mobile (5584), EE (1413), giffgaff (201), Lycamobile (57), O2 (1237), Tesco Mobile (491), Three (590), Virgin Mobile (387) and Vodafone (872).

Q. Have you personally had a reason to complain about any of these services or suppliers in the last 12 months, whether or not you went on to make a complaint?

Red or green shading and * indicates significantly lower/higher than the sector average at the 95% confidence level. Arrows represent a significant increase or decrease compared to 2016. No 2016 data for giffgaff and Lycamobile.¹²³

The most common reason to complain was the mobile service not performing as it should

Where mobile customers did have a reason to complain, the most common cause was a service issue, such as a loss of service, or an inability to use their mobile (2G, 3G or 4G) in certain areas. This has increased compared to 2016.¹²⁴ The next most common cause, was a billing pricing or payment issue, which was unchanged since 2016.

¹²⁰ This metric does not measure whether customers actually went on to make a complaint.

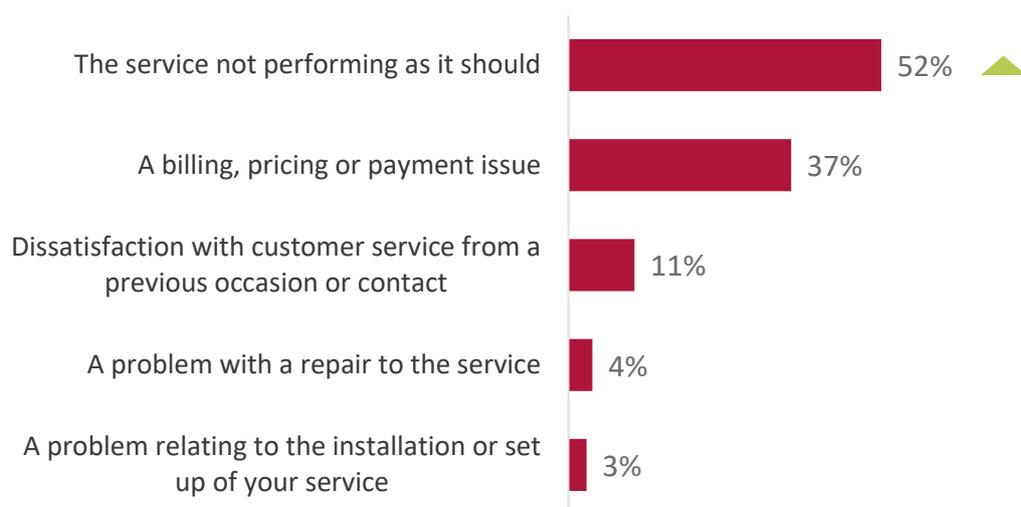
¹²¹ Fieldwork was conducted in January 2018, therefore reasons to complain date back to January 2017.

¹²² Whether or not they went on to make a complaint

¹²³ Reason to complain measures for 2016 are not available for these providers individually as they were captured in an 'other' category in the 2016 study.

¹²⁴ The proportion was 42% in 2016.

Figure 36: Reason to complain about mobile provider



Source: [Ofcom Quality of customer service research](#), face-to-face omnibus survey, fieldwork carried out by Kantar Media, January 2018.

Base: All UK households 16+ who had a reason to complain about mobile (188)

Q. What was the issue/s you had reason to complain about in connection with your fixed broadband internet?

Arrows represent a significant increase or decrease compared to 2016.¹²⁵

Tesco Mobile generated the lowest volume of complaints to Ofcom per 100,000 subscribers

Some customers contact Ofcom to complain about their mobile provider. Ofcom reports on the total number of complaints generated by the main mobile provider for pay-monthly services each quarter;¹²⁶ but does not report on pay-as-you-go mobile services by provider given the low volume of complaints received.¹²⁷

In 2017, Tesco Mobile generated the fewest complaints to Ofcom per 100,000 subscribers. In addition, Vodafone, BT and Virgin Mobile generated complaints per 100,000 subscribers above the industry average.^{128, 129}

¹²⁵ Ofcom, 2018, [Reasons to complain study](#); Ofcom, 2016, [Reasons to Complain data tables](#).

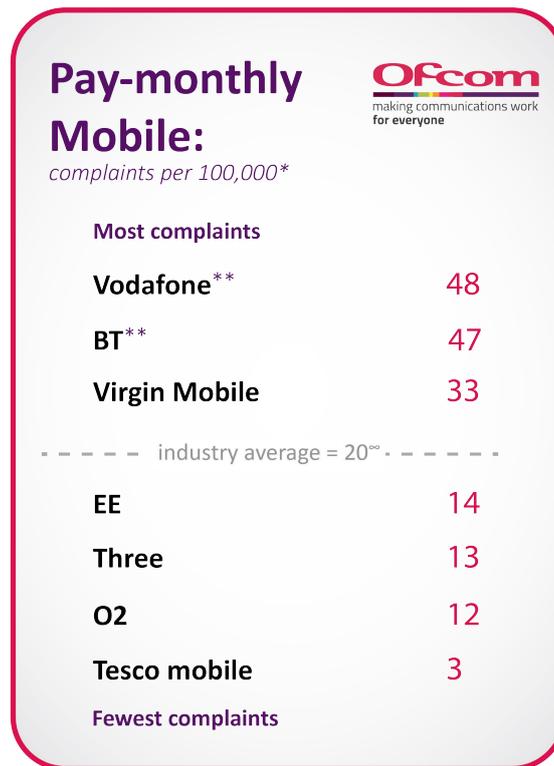
¹²⁶ Further information about how we compile our complaints data can be found in our most recent quarterly report publication: Ofcom, [Telecoms and pay-TV complaints data](#).

¹²⁷ Pay-as-you-go mobile industry trend data can be found in the csv file accompanying the complaints publication [here](#).

¹²⁸ We have normalised complaints figures using the average of the quarterly subscriber figures across the year. This is a change from the methodology used to calculate the 2016 complaints data and therefore we cannot make any comparisons between 2016 and 2017 data.

¹²⁹ Due to the different methodologies used to compile subscriber figures, we have identified through sensitivity checks that BT Mobile's performance in 2017 may be comparable to Vodafone. For more information on the methodology used for complaints, please see our recent quarterly: Ofcom, [Telecoms and pay-TV report](#), paragraph A1.22.

Figure 37: Pay-monthly mobile complaints to Ofcom, per 100,000 subscribers in 2017¹³⁰



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

** Due to the different methodologies used to compile subscriber figures, we have identified through sensitivity checks that BT mobile's performance in 2017 may be comparable to Vodafone.

∞ The pay-monthly mobile industry average complaints per 100,000 subscribers figure was changed from 21 to 20 on 30 April 2019.

Complaints handling¹³¹

Tesco Mobile and EE had high satisfaction with complaints handling

In 2017, just over half of mobile customers who complained to their provider were satisfied with how their complaint was handled. This was in line with 2016.

As with 2016, the quality of complaints handling varied by provider: Tesco Mobile and EE ranked higher than average for satisfaction with complaints handling, whereas Vodafone and Virgin Mobile ranked lower than average.

¹³⁰ This is the first year we are reporting on BT Mobile as BT exceeded the 1.5% market share threshold for residential pay-monthly mobile services in Q1 2017.

¹³¹ In the [Quality of Customer Service – complaints research](#) 'average mobile' refers to the average of the mobile providers included in the survey (see table).

Figure 38: Mobile – satisfaction with complaints handling

	Average mobile	EE	giffgaff	O2	Tesco Mobile	Three	Virgin Mobile	Vodafone
Overall satisfaction with complaint handling	56%	61%*	60%	57%	67%*	57%	49%* ▼	47%*

Source: *Ofcom Quality of customer service – complaints research*, online survey, fieldwork carried out by BDRC, December 2017/January 2018

Q. Overall, how satisfied are you with the service you received from [provider] customer services with regard to the complaint that you had?

Base: All who complained about the mobile service in past 6 months (2856), EE (511), giffgaff (219), O2 (538), Tesco Mobile (319), Three (500), Virgin Media (269), Vodafone (500)

Red or green shading and * indicates significantly lower/higher than the sector average at the 95% confidence level. Arrows represent a significant increase or decrease compared to 2016. No 2016 data for giffgaff.¹³²

These findings for overall satisfaction were also reflected in satisfaction with customer service during the complaints handling process, with Tesco Mobile and EE ranking higher than average across a number of factors, while Virgin Mobile and Vodafone ranked lower than average across a number of factors.

Figure 39: Mobile – satisfaction with customer service received when making a complaint

Satisfaction with specific aspects of customer service:	Average mobile	EE	giffgaff	O2	Tesco Mobile	Three	Virgin Mobile	Vodafone
Ease of finding provider contact details	65%	69% ▲	63%	63%	69%	68%	61% ▼	63%
Ease of getting through to the right person (PHONE)	53%	60%*	50%	50%	65%*	60%	46%	44%*
Time taken to handle issue	56%	61%*	58%	56% ▼	66%* ▼	57%	49%* ▼	47%*
Getting issue resolved to your satisfaction	57%	61%	59%	58% ▼	65%* ▼	58%	48%* ▼	49%*
Courtesy and politeness of advisors	67%	71%	62%	65%	74%* ▲	69%	61% ▼	62%*
Advisor doing what they said they would do	59%	64%	61%	61%	70%*	62%	52%* ▼	49%*
Logging of query details to avoid having to repeat yourself	55%	60%*	59%	55% ▼	61% ▼	55%	46%* ▼	50%*
Offering compensation or goodwill payment	48% ▼	49%	52%	48% ▼	52% ▼	51%	43% ▼	43%*
Willingness to help resolve your issue	62%	68%* ▲	62%	60% ▼	70%* ▼	63%	56%* ▼	55%*

Source: *Ofcom Quality of customer service – complaints research*, online survey, fieldwork carried out by BDRC, December 2017/January 2018

Q. And how satisfied were you with the following aspects of [provider]'s customer service?

Base: All who complained about the mobile service in past 6 months (2856), EE (511), giffgaff (219), O2 (538), Tesco Mobile (319), Three (500), Virgin Media (269), Vodafone (500).

Red or green shading and * indicates significantly lower/higher than the sector average at the 95% confidence level. Arrows represent a significant increase or decrease compared to 2016. No 2016 data for giffgaff.

¹³² Giffgaff was added to the 2017/18 survey as it reached the 4% market share inclusion criteria.

Just over half of all mobile complaints were completely resolved

Mobile customers reported that just over half of their complaints were completely resolved; higher for EE and lower for Vodafone, Virgin Mobile and Three.

In addition, the proportion of all complaints that were completely resolved on the first contact with their provider was lower than average for Vodafone, but higher for EE and Tesco Mobile.

Figure 40: Mobile – satisfaction with resolution of complaints

	Average mobile	EE	giffgaff	O2	Tesco Mobile	Three	Virgin Mobile	Vodafone
Proportion of complaints completely resolved	54% ▼	61%*	57%	54% ▼	59% ▼	49%*	47%* ▼	47%*
Proportion of complaints resolved on first contact	43%	48%*	48%	45%	50%*	41%	38%	35%*

Source: *Ofcom Quality of customer service – complaints research*, online survey, fieldwork carried out by BDRC, December 2017/January 2018

Q. In your opinion, was [provider] able to successfully resolve your complaint? Q. You said that your complaint was completely resolved, was it completely resolved on your first contact with PROVIDER?

Base: All who complained about the mobile service in past 6 months (2856), EE (511), giffgaff (219), O2 (538), Tesco Mobile (319), Three (500), Virgin Media (269), Vodafone (500)

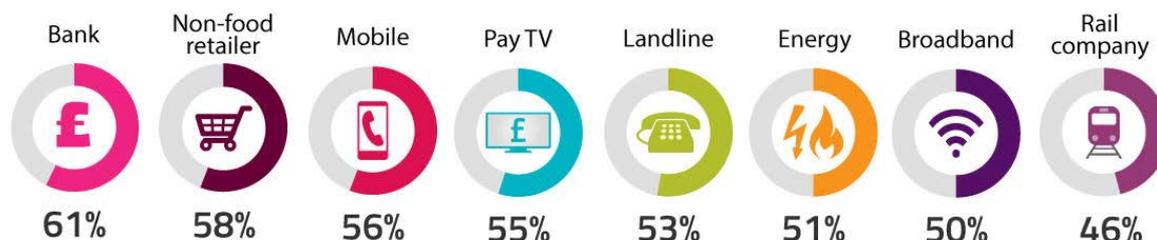
Red or green shading and * indicates significantly lower/higher than the sector average at the 95% confidence level.

Arrows represent a significant increase or decrease compared to 2016. No 2016 data for giffgaff. No 2016 data for proportion of complaints resolved on first contact.

Satisfaction with complaint handling in the mobile sector was in line with, or above, other sectors

Levels of satisfaction with complaint handling overall in the mobile sector were in line with the bank, non-food retail and energy, sectors, however they were higher than satisfaction with complaint handling in the rail sector.

Figure 41: Overall satisfaction with complaint handling in communications, energy, bank, non-food retail and rail sectors



Source for landline, mobile, broadband and pay TV: [Ofcom Quality of customer service – complaints research](#), online survey, fieldwork carried out by BDRC, December 2017/January 2018

Q. Overall, how satisfied are you with the service you received from [provider] customer services with regard to the complaint that you had?

Base: All who complained about each service in past 6 months: Landline (2002), Mobile (2856), Broadband (3396), Pay TV (1824).

Source for energy, bank, rail company and non-food retailer: [Ofcom complaint handling benchmarking survey - online survey](#), fieldwork carried out by Populus, 6 – 7 December

Q. Overall, how satisfied are you with the service you received from [provider] customer services with regard to the complaint that you had?

Base: All who complained about each service in the past 6 months: energy (223), bank (210), non-food retailer (395) and rail company (172).

Complaints taken to an alternative dispute resolution scheme

Billing was the most common type of complaint taken to an alternative dispute resolution scheme

If a customer believes their provider has not dealt with a complaint properly, they can escalate it to the appropriate alternative dispute resolution (ADR) scheme.¹³³ There are two schemes that handle mobile complaints, both of which have recently published data summarising the complaints they received between October and December 2017, broken down by provider. This information can be found on their respective websites.¹³⁴

As in 2016, complaints related to billing were the most common type of complaint made to the ADR schemes. There were also frequent complaints made about service quality and contract issues.

¹³³ Ofcom currently approves two ADR schemes in communications: Ombudsman Services: Communications (OS) and Communication and Internet Services Adjudication scheme (CISAS). Our most recent review is [here](#).

¹³⁴ [OS website](#) and [CISAS website](#).

Figure 42: Most common type of complaints made to ADR schemes for the largest mobile providers

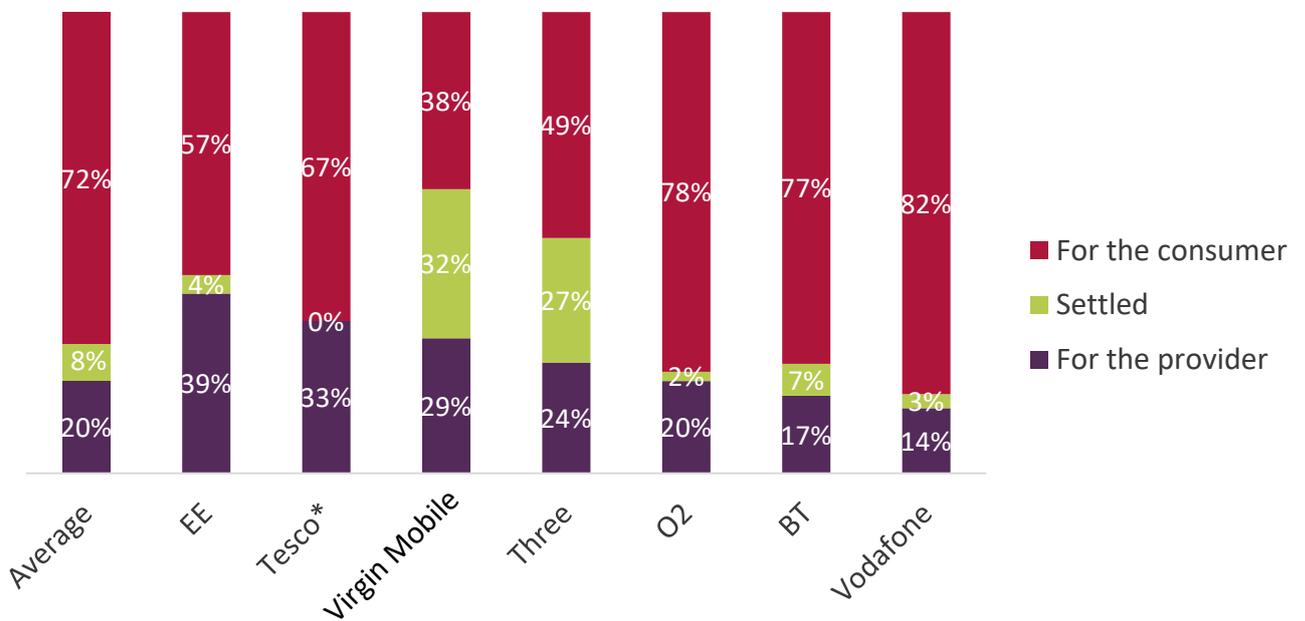
	Most Common	Second Most Common
BT	Billing (31%)	Service Quality (23%)
EE	Billing (34%)	Contract Issues (16%)
O2	Billing (33%)	Contract Issues (19%)
Tesco	Billing (32%)	Contract Issues (18%), Service Quality (18%), Security (18%)
Three	Billing (30%)	Service Quality (22%)
Virgin Mobile	Billing (36%)	Contract Issues (19%)
Vodafone	Billing (51%)	Contract Issues (16%)

Source: CISAS and OS data

Over three quarters of the mobile complaints considered by the ADR schemes, were found in favour of the consumer or settled

Vodafone had the highest proportion of complaints found in favour of the consumer,¹³⁵ whereas EE had the lowest. Virgin Mobile and Three settled a much larger proportion of complaints than the other providers.

Figure 43: ADR case outcomes for the largest mobile providers (Q4, 2017)



Source: CISAS and OS data. Some figures do not sum to 100% due to rounding, those marked * have a low base size.

¹³⁵ ADR schemes will investigate a complaint if it is within their terms of reference, and will then allocate the outcome to the following categories: for the provider these are cases that are found entirely in favour of the communications provider, with nothing going to the consumer; settled - these are cases resolved with the agreement of both the communications provider and the consumer without the need for an investigation; and for the consumer, these are cases where any part of the complaint is found in favour of the customer.



Business services – fixed and mobile

Overview

This chapter focuses on the service quality experience of small and medium-sized enterprises (SMEs).¹³⁶ In 2017, there were around 5.7 million SMEs, accounting for over 99% of all businesses in the UK. Of these, around 5.4 million were micro-businesses, with less than 10 employees.¹³⁷

SMEs are vital to the success of the UK economy, and communications services are of key importance for such businesses. Previous Ofcom research has found that around eight in ten (81%) SMEs agreed that communication services were fundamental to their business.¹³⁸ For broadband, SMEs have highlighted the importance of having sufficient bandwidth to enable them to conduct routine business operations quickly, reliably and predictably.¹³⁹

However, compared to larger businesses, SMEs can face particular challenges when engaging with communications services, especially where they do not employ technical experts. They can struggle to understand some of the technology involved and to understand which products and services are best suited to their needs.¹⁴⁰ Some are also unaware of the level of service quality that their provider offers.¹⁴¹

This chapter first looks at business landline and fixed broadband services and then business mobile services.¹⁴² The focus is on services provided to customers on standard business contracts, as opposed to more bespoke contracts (e.g. leased lines for fixed services).¹⁴³ However, some SMEs

¹³⁶ SMEs are defined as any business with fewer than 250 employees.

¹³⁷ Department for Business, Energy & Industrial Strategy, [Business population estimates 2017](#).

¹³⁸ Ofcom, 2017, [“The SME experience of communications service: research report”](#), p.8.

¹³⁹ BDRC, 2018, [SME Communications Needs](#), p.27.

¹⁴⁰ *ibid*, p.15.

¹⁴¹ *ibid*, p.37.

¹⁴² Ofcom did not carry out a repeat of the “SME experience of communications service: research report” in 2017, therefore this section draws on provider responses: Ofcom, 2017, [Narrowband Market Review](#), and a new piece of qualitative research, BDRC, 2018, [SME Communication Needs](#).

¹⁴³ Different providers classify their business customers in different ways, including by employee count, wallet spend, products purchased. In the absence of a common approach across providers, we have looked at the SLAs offered to

choose to purchase communications products marketed at residential consumers and have contracts that reflect this.¹⁴⁴ The comparisons we make elsewhere in the report will therefore be relevant to those businesses.

Business landline and fixed broadband services

The market that provides fixed services to businesses is very complex with many suppliers and a wide variety of specialist landline and broadband products. In 2017, BT Business accounted for the largest share of SME customers (estimated to be over 40%), with TalkTalk, Virgin Media, XLN Telecom and Verastar¹⁴⁵ combined making up an estimated 25%, and a long tail of other providers and resellers making up the rest.¹⁴⁶ For the purposes of this report we have focused on the standard business contracts that these five main providers offer. For this report, standard business contracts exclude leased lines, ISDN 30 products, and residential contracts or packages.

Most of the main providers offer a choice of service quality

A key distinguishing feature of business contracts for landline and fixed broadband is the use of service level agreements (SLAs). These set out a provider's commitment to offer services at an agreed quality. SLAs often cover, but are not limited to, fault repair times, installation times, the time period within which action will be taken when a query or complaint is raised, and some also state the maximum number of days without service before compensation is paid to the business.

A provider will typically offer a range of SLAs for business customers to choose between. On repair times, for instance, service care levels ranged from repairs within as little as six hours to repairs within two to three working days, depending on the provider, service (landline or broadband), and the package selected by the SME. Businesses usually paid an additional charge to sign up to a higher SLA, although providers such as Virgin Media bundled higher SLAs as part of their higher speed packages.

customers on standard rather than more bespoke contracts (i.e. leased lines for fixed services), which are more likely to be used by SMEs, though some larger businesses may also use such contracts.

¹⁴⁴ Ofcom research indicates that 30-33% of SMEs have a residential contract for their internet service, while 25-30% have a residential landline contract. This is based on two pieces of research: Ofcom, January 2017, [SME experience of communications services](#), p.85 and Jigsaw, March 2017, [Automatic compensation research](#), slide 66, questions B8A and B11A.

¹⁴⁵ Verastar is the parent company for Unicom, kinex, Woav and Clear Business.

¹⁴⁶ Figures are based on SME research from: Ofcom, 2017, [Narrowband Market Research review](#). See questions 7A and 8A for more information.

Four of the five providers covered in this section, BT Business, Verastar, Virgin Media and XLN Telecom, offered a choice of SLAs to customers on standard business contracts. TalkTalk, however, applied a standard single service care level across all such contracts.¹⁴⁷

Of the main providers:

- Only Virgin Media offered a broadband repair time of twelve hours; the fastest repair time offered by Openreach providers is by end of next business day.
- Most offered faster repair times for landline services, starting from six hours.

Figure 44: The range of fault repair times offered to customers on standard business contracts for landline and broadband services

Provider	Fault repair times (from day of report)
BT Business	Fixed line: Between six hours to midnight on the 2 nd working day Broadband: Between midnight on the next weekday or Saturday to midnight on the 2 nd working day
TalkTalk Business	5 days (from standard terms and conditions for business contracts)
Verastar	Fixed line: Between six hours to midnight on the 2 nd working day Broadband: Between midnight on the next weekday or Saturday to midnight on the 2 nd working day
Virgin Media Business	Fixed line: Between 6-24 hours Broadband: Between 12-48 hours
XLN Telecom	Fixed line: Between six hours to midnight on the 2 nd working day Broadband: Between midnight on the next weekday or Saturday to midnight on the 2 nd working day

Source: Ofcom analysis of provider information.

BT, Virgin Media and XLN Telecom offered compensation related to SLAs

Not all providers offer compensation if they fail to meet their SLAs. Of the main providers, only BT Business, Virgin Media and XLN Telecom offered such compensation in 2017. For example, BT Business set out that failure to meet a service level would entitle the business customer to service credits. Virgin Media offered one month's line rental for certain products where faults were not fixed within 24 hours of being reported. XLN compensated the customer by reimbursing them the daily rate of their package for each day that the agreed SLA is missed. In some circumstances XLN also offered a full month's package price as compensation.

¹⁴⁷ TalkTalk aims to resolve faults and installation issue within a fixed number of days and includes this within the terms and conditions for standard business contracts.

Phone was the most popular way for SMEs to contact their fixed provider

Phone was the most popular method of contact, accounting for between seven in ten and nine in ten contacts.¹⁴⁸ Verastar was the only main provider that offered a call-back service to its customers on standard business contracts.¹⁴⁹ Other methods, such as email and webchat, accounted for a much smaller proportion of contacts.¹⁵⁰

Of the main providers, Verastar, Virgin Media, and XLN responded to individual business customer queries or complaints via social media (such as Twitter and Facebook), while BT Business and TalkTalk Business did not.

Business mobile services

The market for business mobile services is largely served by EE, O2 and Vodafone.

EE and O2 mobile customers preferred to call whilst Vodafone's customers mainly contacted their provider by email or webchat

Phone was the most popular method of contact for EE and O2 business customers. For these providers, email and webchat accounted for a much smaller proportion of customer contacts. However, for Vodafone, email and webchat combined were more popular methods of contact compared to the phone.

All three providers responded to customer queries or complaints via social media, such as Twitter and Facebook (however they did not differentiate between residential and business customers).

Providers offered business customers enhanced service features

Mobile providers offered business customers enhanced features,¹⁵¹ including features to enhance service quality. Examples included the following:

- EE offered businesses on its 'small business plan' a free phone replacement if the phone develops a fault.¹⁵² Business that have between five and nine eligible connections had priority routing of their calls when contacting EE, and faster phone replacement.
- O2 offered an extended manufacturer's warranty on mobile equipment for the duration of the minimum term of the agreement.

¹⁴⁸ Across providers this ranged from 72%-89% of all contacts made in 2017.

¹⁴⁹ By 'call back facility' we are referring to whether customers are given the option to be called back by a customer services agent before or while they are queuing to speak to a call services agent.

¹⁵⁰ Across providers, this ranged from 11%-28% in 2017.

¹⁵¹ These may not necessarily be available to residential customers.

¹⁵² By comparison, for a typical residential contract, the customer would need to send a faulty phone to EE for repair.

- Vodafone provided its business customers with an insurance product that guarantees a replacement for faulty handsets within 4 hours. Vodafone also offered a service that provides customers with a dedicated point of contact for advice and assistance.



Glossary

2G Second generation of mobile systems. Uses digital transmission to support voice, low-speed data communications, and short messaging services.

3G Third generation of mobile systems. Provides higher-speed data transmission and supports multi-media applications such as video, audio and internet access, alongside conventional voice services.

4G Fourth generation of mobile systems designed to provide faster data download and upload speeds on mobile networks.

ADR Alternative dispute resolution schemes act as an independent middleman between the service provider and the customer when an initial complaint cannot be resolved.

ADSL This is the technology supporting standard broadband services, delivered over a copper telephone line. These are often advertised with 'up to' download speed of 17Mbit/s. ADSL stands for Asymmetric Digital Subscriber Line. 'Asymmetric' means that it allows higher speeds in one direction ('downstream' towards the customer) than the other.

Bandwidth The physical characteristic of a telecommunications system that indicates the amount of data that can be transmitted in a fixed amount of time.

Broadband A data service or connection generally defined as being 'always on' and providing a bandwidth greater than narrowband (dial-up) connections.

Cable This is an alternative technology for providing superfast broadband, where the service is delivered over a cable network (instead of the copper telephone line). Services with download speeds up to 300Mbit/s are currently available from this type of network.

Call waiting time The amount of time waiting on hold to talk to a customer service agent.

FTTC Fibre to the Cabinet. This is the most commonly used technology for superfast broadband services using the existing telephone line to the end user premises. High broadband speeds are achieved because the telephone line is connected to a cabinet installed in the street which is connected to the rest of the network using optical fibres. These are often advertised with 'up to' download speed of 38Mbit/s, 52Mbit/s or 76Mbit/s. The higher speeds are achieved by reducing the length of the copper telephone line between the premises and the network equipment.

FTTP / Full fibre broadband Fibre to the Premises. This is an alternative technology for fibre broadband service, where the optical fibre is installed all the way from the local exchange (or similar building) to the household, and is capable of providing ultrafast broadband speeds.

Mbit/s Megabits per second (1 Megabit = 1 million bits). A measure of bandwidth in a digital system.

Net Promoter Score™ (NPS™) A measure of the willingness of customers to recommend their current provider to friends or family members. It is calculated by taking the percentage of promoters away from the percentage of detractors.

Openreach The part of BT responsible for installing and maintaining connections for retail providers.

Resellers – Providers that sell connectivity services from national players who own their own networks.

Retail provider (provider) An organisation that provides electronic communications services to consumers

SLAs – Service Level Agreements are part of commercial contracts and set out a supplier's commitment to provide services to an agreed quality, e.g. within a specified period.

SME Small and Medium Enterprises are businesses with 249 or fewer employees.

Standard broadband Broadband services that deliver download speeds of less than 30Mbit/s, typically over a copper telephone line.

Superfast broadband Broadband services that deliver download speeds of between 30 Mbit/s and 100 Mbit/s, typically over fibre to the cabinet connection or coaxial cable (on Virgin Media's network).

Ultrafast broadband The customer satisfaction research included in this report used the definition of ultrafast broadband being broadband services that deliver download speeds of greater than 100 Mbit/s; Ofcom has since updated this definition to delivering download speeds of greater than 300 Mbit/s.

Webchat A system that allows consumers to communicate in real time with provider's customer service agents using messaging on the supplier's website

Wifi A short range wireless access technology that allows devices to connect to a network. These technologies allow an over-the-air connection between a wireless client and a base station or between two wireless clients.



Riverside House
2a Southwark Bridge Road
London SE1 9HA
www.ofcom.org.uk

Tel: +44 (0)300 123 3000
+44 (0)20 7981 3000
Fax: +44 (0)20 7981 3333
Textphone: 020 7981 3043