

# Choosing the best broadband, mobile and landline provider

Comparing Service Quality



# Overview

This is Ofcom's third annual report on how service levels compare in telecoms.

As part of our work to ensure fairness for customers, we want to help people make more informed decisions about which provider is best for them. We also want to encourage providers to improve the quality of their services.

By shining a light on the performance of the UK's main mobile, broadband and home phone providers, this report allows people to look beyond the price of a service.

## What we have found

- **Overall customer satisfaction this year for all three of these markets is in line with 2018.** There have been some positive developments – for example, complaints to Ofcom about telecoms companies fell last year. Also, the number of broadband customers with a reason to complain about their service declined.
- **Some companies set a stronger standard for satisfaction than others.** For broadband, Sky customers were less likely to have a reason to complain, and more likely to be satisfied with how their complaint was handled. Meanwhile, for mobile giffgaff and Tesco Mobile customers were more likely to recommend their provider to a friend, and had higher than average satisfaction with value for money.
- **However, there is room for improvement in several areas.** Only around half of broadband customers who made a complaint last year were satisfied with the way it was handled. Also, a lower proportion of broadband complaints were resolved on first contact than in 2017.
- **TalkTalk has generally scored below the broadband industry average across several measures,** with its customers less likely to be satisfied with their overall service, its reliability and speed. Its customers were also more likely to have a reason to complain, and less likely to have complaints resolved on first contact or be satisfied with how their complaint was handled.

The information in the report has been collected through our own research, directly from the larger telecoms providers, and from third parties.

The high-level findings in this narrative report are supported by an interactive version, which provides detailed information on how providers compare across all the data sets we have collected.<sup>1</sup>

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<sup>1</sup> See [Comparing Service Quality – Interactive Report 2019](#)

## Mobile phones

Customers' overall satisfaction with their mobile service (93%) is in line with 2018. However, customers are more likely to be satisfied with reception or signal strength than they were last year. A small proportion of mobile customers (4%) report having a reason to complain in the last 12 months.<sup>2</sup>

Complaints about mobile companies<sup>3</sup> to Ofcom fell in 2018 to an average of 17 per 100,000 subscribers – down from 21 the year before. Virgin Mobile generated the most complaints per 100,000 subscribers (41) and Tesco Mobile the fewest (3).

There are more ways than ever for mobile customers to contact their provider. Most contacts are by telephone (82%), with 15% using webchat and the rest by email, mobile applications, social media, letter or in-store. Customers choosing to call their provider are waiting an average of 52 seconds for their call to be answered, six seconds less than the previous year.

Giffgaff and Tesco Mobile customers are more likely than average to recommend their provider to a friend. These customers also reported higher than average satisfaction with value for money.

In December 2018, O2's network suffered an outage that affected all customers on the network. This led to more O2 customers having a reason to complain than the industry average and compared with the previous year.<sup>4</sup> It also led to a large spike on postings about telecoms providers on Twitter and Facebook. However, satisfaction with complaint handling among O2 customers was also in line with the average and with the previous year.

### Mobile: overview of data

Market research		Overall average								
Satisfaction		93%	N/A	93%	96%	92%	▼90%	92%	91%	93%
Customers with a reason to complain		4%	N/A	2%	3%	▲6%	3%	2%	3%	▼4%
Satisfaction with complaints handling		56%	N/A	58%	60%	54%	▼59%	59%	44%	▲54%
Provider data										
Average call waiting time (mm:ss)		0:52	1:00	00:58	N/A	0:48	1:04	00:49	00:45	00:49
Complaints to Ofcom per 100k subscribers		18	33	11	N/A	11	3	13	44	35

▲ ▼ significantly higher or lower than **previous year** at the 99% confidence level for market research results

X% significantly **higher or lower** than the sector **average** at the 95% confidence level for market research results

X% significantly **higher or lower** than the sector **average** at the 95% confidence level for market research results

**Notes:** For definitions and methodology see relevant report section and annexes 1 and 3; 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. 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.

<sup>2</sup> Fieldwork was conducted in December 2018, therefore reasons to complain date back to December 2017.

<sup>3</sup> Refer to Figure 8 for further detail and definitions.

<sup>4</sup> O2's network outage was 6 December 2018 and affected all operators using their network. Ofcom's Customer complaints research: Reason to complain fieldwork was carried out between 5-16 December 2018.

## Home phone and broadband

**Customers' satisfaction with their home broadband service (83%) is in line with last year (80%).**

TalkTalk customers continue to be less likely than average to be satisfied with different aspects of their service. They were also less likely than average to recommend their provider to a friend.

**A broadband customer had to wait an average of one minute 37 seconds for their call to be answered by a customer service agent** – nearly twice as long as calls to mobile providers. TalkTalk customers had the shortest call waiting times on average (33 seconds) and Plusnet by far the longest (six minutes 47 seconds).

**The proportion of customers with a reason to complain (13%) about their broadband in 2018<sup>5</sup> was lower than the year before (15%).** However, in 2018 broadband customers were more likely to have had a reason to complain than mobile and landline customers.

**Only around half (51%) of broadband customers who made a complaint were satisfied with the way it was handled,** unchanged year-on-year. Also, a lower proportion of broadband complaints were resolved on first contact than in 2017 (32%, down from 35%). TalkTalk customers who complained were less likely than average to report their complaint as being resolved on first contact, and to be satisfied overall with how their complaint was handled.

**Complaints to Ofcom fell in 2018 for both broadband and landline services.<sup>6</sup>** There were 58 complaints per 100,000 subscribers on average for broadband, down from 75 in 2017. Sky had the fewest complaints for both broadband (20) and landline (18), and Plusnet had the most (101 and 76 respectively).

**Installations of new services took an average of 14 days in 2018.** This was a one-day increase compared to 2017. Rural installations continued to take an average of one day longer than those in urban areas, and there was no change in the proportion of installations taking more than 30 days from the order date (5%).

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<sup>5</sup> Fieldwork was conducted in December 2018, therefore reasons to complain date back to December 2017.

<sup>6</sup> Ofcom reports on the number of complaints generated by the major mobile providers for pay-monthly services each quarter but does not report on pay-as-you-go mobile services due to low complaint volumes. Refer to Figure 21.

## Home broadband: overview of data

Market research		Overall average								
Satisfaction		83%	80%	87%	N/A	86%	N/A	83%	79%	85%
Customers with a reason to complain		▼13%	12%	11%	N/A	12%	N/A	▼10%	17%	15%
Satisfaction with complaints handling		49%	47%	53%	N/A	49%	n/a	54%	44%	47%
Provider data										
Average call waiting time (mm:ss)		1:37	1:13	0:35	2:44	6:47	0:34	1:24	0:33	2:19
Complaints to Ofcom per 100k subscribers		58	79	36	N/A	101	N/A	20	96	51

▲ ▼ significantly higher or lower than **previous year** at the 99% confidence level for market research results

X% significantly **higher or lower** than the sector **average** at the 95% confidence level for market research results

X% significantly **higher or lower** than the sector **average** at the 95% confidence level for market research results

**Notes:** For definitions and methodology see relevant report section and annex; call waiting times are calculated for landline and broadband services together; a sufficient sample was not obtained in the satisfaction research to be able to publish a metric for Post Office.

## Landline: overview of data

Market Research		Overall average								
Satisfaction		86%	88%	90%	N/A	89%	N/A	86%	81%	83%
Customers with a reason to complain		3%	4%	2%	N/A	2%	9%	2%	6%	3%
Satisfaction with complaints handling		51%	50%	63%	N/A	N/A	N/A	52%	48%	52%
Provider data										
Average call waiting time (mm:ss)		1:37	1:13	0:35	2:44	6:47	0:34	1:24	0:33	2:19
Complaints to Ofcom per 100k subscribers		45	53	27	N/A	65	57	18	78	45

▲ ▼ significantly higher or lower than **previous year** at the 99% confidence level for market research results

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X% significantly **higher or lower** than the sector **average** at the 95% confidence level for market research results

**Notes:** For definitions and methodology see relevant report section and annexes 1nd 3; call waiting times are calculated for landline and broadband services together; a sufficient sample was not obtained in the satisfaction research to be able to publish a metric for Post Office.

## Social media posts about telecoms providers

To gain further insight into customers' views about service quality, we commissioned analysis of public Twitter and Facebook posts in 2018 about telecoms providers. The full findings are published alongside this report. The analysis of over 95,000 posts found the following:

- The most common issues consumers discussed were related to customer service and price or billing issues. Posts about customer service were most likely to be emotive and were also most likely to mention Ofcom;
- Posts about Plusnet, TalkTalk and Vodafone were most likely to be about poor customer service;
- Among mobile providers, Three was most likely to be mentioned in posts about signal, coverage and data. This was despite O2 having a major outage in December, which accounted for 8% of the total number of posts across all providers in 2018, and 53% of all posts about O2.

## What Ofcom is doing to help improve service quality for telecoms customers

Ofcom has an ongoing programme of work to improve service quality. Since our last report we have:

- introduced **automatic compensation** from 1 April 2019, meaning broadband and landline customers get money back when things go wrong, without having to ask for it. Firms signed up to the scheme<sup>7</sup> will give customers compensation as follows:

Problem	A landline or broadband customer would be entitled to compensation if...	Amount of compensation
Delayed repair following loss of service	Their service has stopped working and it is not fully fixed after two full working days.	 £8 for each calendar day that the service is not repaired
Missed appointments	An engineer does not turn up for a scheduled appointment, or it is cancelled with less than 24 hours' notice.	 £25 per missed appointment
Delays with the start of a new service	Their provider promises to start a new service on a particular date, but fails to do so.	 £5 for each calendar day of delay, including the missed start date

- strengthened **broadband customers' rights**<sup>8</sup> from March 2019, so they are given more accurate speeds information and can exit their contract penalty free if their speed falls below the minimum guaranteed level;
- strengthened our **rules on complaints handling**<sup>9</sup>, to ensure providers deal with customer complaints more effectively, from October 2018; and

<sup>7</sup> For more information about the scheme, including which providers are signed up, visit the Ofcom website

<sup>8</sup> [Broadband Speeds Code of Practice Consultation](#) or [Ofcom's Consumer Guide](#)

<sup>9</sup> [Consolidated General Conditions](#); October 2018

- launched our “**Boost your Broadband**” campaign in December 2018 to help people to find out if they can get a faster service and/or a cheaper broadband package.<sup>10</sup>

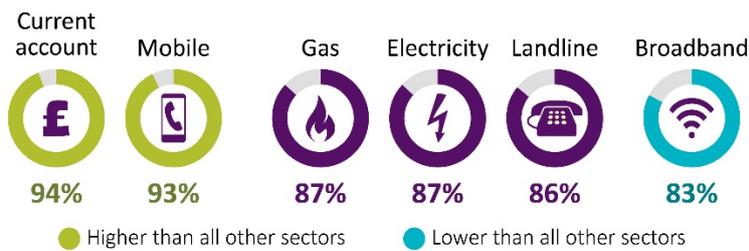
In addition, we are implementing the Government’s universal broadband service, which will give people the legal right to request a decent connection.<sup>11</sup> This forms part of our broader programme of work to support better broadband and mobile services, which is a priority for us.<sup>12</sup>

In the longer term, we are promoting competition and investment in ultrafast full-fibre networks, which will transform the broadband service experience for people and businesses.

## Comparison with other sectors

Mobile customers’ satisfaction with their overall service was in line with that for current accounts and above those of gas, electricity, landline and broadband. However, broadband customers’ satisfaction with their overall service was lower than for other services.

Figure 1: Cross-sector satisfaction



Source: [Ofcom Customer Satisfaction Tracker 2019](#).

<sup>10</sup> [Boost your Broadband website](#).

<sup>11</sup> [More information on the broadband USO](#).

<sup>12</sup> [Ofcom’s Annual Plan: our programme of work for 2019/20](#), page 6-7.



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# Residential mobile services

## Satisfaction

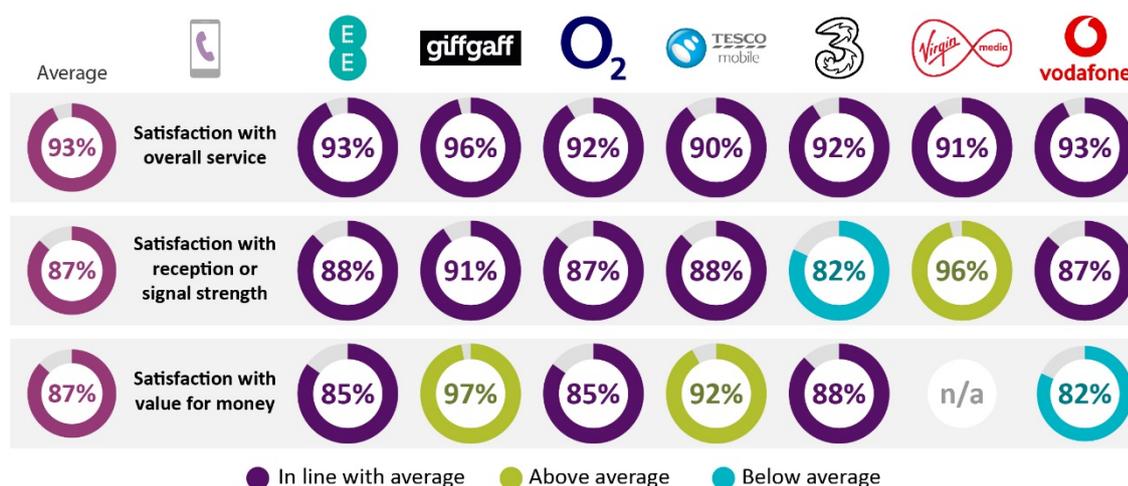
**Satisfaction with mobile services in 2019 was in line with last year**, with 93% of mobile customers satisfied with the overall service provided. Where customers were dissatisfied,<sup>13</sup> the main cause was any type of poor reception or coverage (63%) followed by their mobile service being too expensive or not good value for money (16%).

Satisfaction levels with all mobile providers included in the research<sup>14</sup> were in line with the sector average. Overall satisfaction levels were comparable to the previous year for all providers except Tesco Mobile, whose customers were less likely to be satisfied

(90%, down from 97% the previous year). Eighty-seven per cent of mobile customers were satisfied with the reception or signal strength of their mobile service, up since 2018 (84%).

Customers of Virgin Mobile (a virtual mobile network operator which uses EE's network) were more likely than average to be satisfied with their mobile service reception or signal strength (96%, up from 86% in the previous year). Three's customers (82%) were less likely than average to be satisfied with the reception or signal strength of their mobile service.

Figure 2: Satisfaction with mobile service



Source: [Ofcom Customer Satisfaction Tracker 2019](#) (see note A in Annex 1 for more details).

Notes: Green shading denotes a measure that is significantly higher and blue shading a measure that is significantly lower than the market average (at the 95% confidence level). No data for satisfaction with value for money for Virgin Mobile due to insufficient base size.

<sup>13</sup> 3% said they were dissatisfied with their mobile service overall.

<sup>14</sup> Refer to [Ofcom Customer Satisfaction Tracker 2019](#).

**Giffgaff and Tesco Mobile customers were more likely to say they would recommend their provider to a friend, even though they reported levels of satisfaction with their service that were in line with the average.** This may have been driven by higher than average satisfaction with value for money among customers of these two providers (97% for giffgaff and 92% for Tesco Mobile, compared to the 87% average).

*Figure 3: Recommend to a friend: mobile providers*

	2018	2019
More likely to recommend	 	 
Mobile average	  	    
Less likely to recommend	 	

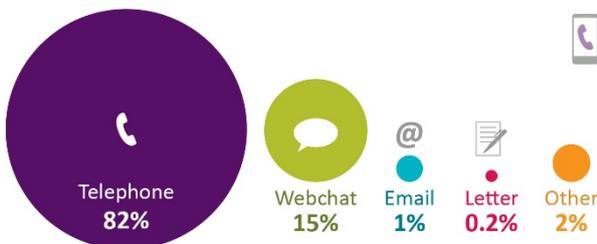
**Source:** *Ofcom Customer Satisfaction Tracker 2019* (see note B in Annex 1 for more details).

## Customer service

All the major mobile providers offered telephone, social media, letter and email/webform as ways in which their customers could contact them in 2018.<sup>15</sup> Overall, phone calls were the most popular method of customer contact with major mobile providers, accounting for 82% of contacts during the year.<sup>16</sup>

**In 2018, all the major mobile providers provided a dedicated mobile application for their customers.** These offered a variety of functions, of which the most common were viewing bills and payment plans and viewing usage statistics (e.g. data use). Three was the only provider which offered in-app live webchat or ‘asynchronous messaging’.<sup>17</sup>

*Figure 4: Customer contacts with mobile providers, by channel: 2018*



**Source:** *Ofcom / provider data, 2018.*

Where mobile providers responded to customer contacts using social media, Facebook and Twitter were the most frequently used platforms, although EE, Tesco Mobile and O2 also responded to customers via Instagram. As a rule, mobile operators responded to customers using whichever method of contact the customer used, unless account-specific details needed to be disclosed.

<sup>15</sup> By ‘customer contact’ we mean a recorded instance when a residential customer interacts with a customer services agent or other employee to make an enquiry or complaint about their residential mobile service. We have excluded interactions with mobile applications as it is not possible to measure the number of interactions with a customer services agent that originated within a mobile application.

<sup>16</sup> Due to differing methods of data collection, we are unable to compare 2018 data with previous years.

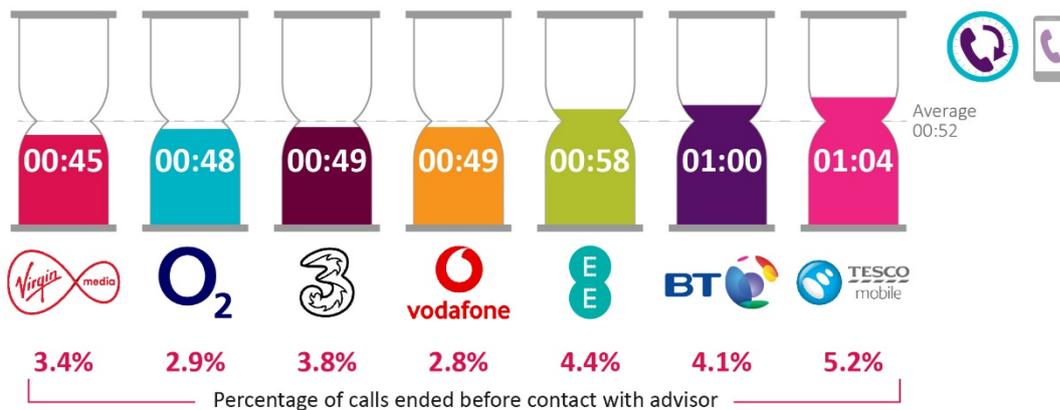
<sup>17</sup> ‘Asynchronous messaging’ is where customer messages are placed in a queue for a response. Responses may not be immediate and are not real-time.

## Call waiting time and abandonment rates

On average in 2018, mobile customers waited in a queue for 52 seconds before speaking to an advisor. This was six seconds less than in 2017.<sup>18</sup> Among the major mobile providers, Virgin Mobile customers had the shortest average call waiting time (45 seconds) while Tesco Mobile's had the longest average wait, at just over a minute.

On average, customers ended 4% of calls while they were waiting to speak to an advisor, down from 5% in 2017.

Figure 5: Average call waiting times, by provider: 2018



Source: Ofcom / provider data, 2018.

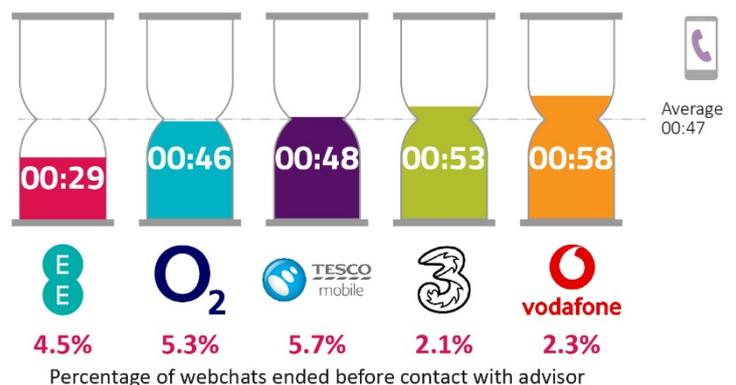
Notes: Figures for BT include provider call-backs to customers.

## Webchat

Every major mobile provider except Virgin Mobile offered webchat as a method of customer contact in 2018. It took an average of 47 seconds for an agent to respond after a customer initiated a webchat conversation. Vodafone had the longest average time to respond (58 seconds), while EE had the shortest average time (29 seconds).

On average, 4% of webchats initiated by mobile customers were abandoned before contact was made with an agent.

Figure 6: Average agent response time from when a customer initiates a webchat, mobile providers: 2018



Source: Ofcom / provider data, 2018.<sup>19</sup>

<sup>18</sup> The 2017 average used for comparison did not include figures for Vodafone.

<sup>19</sup> Vodafone's figure represents five months of data only: August to December 2019.

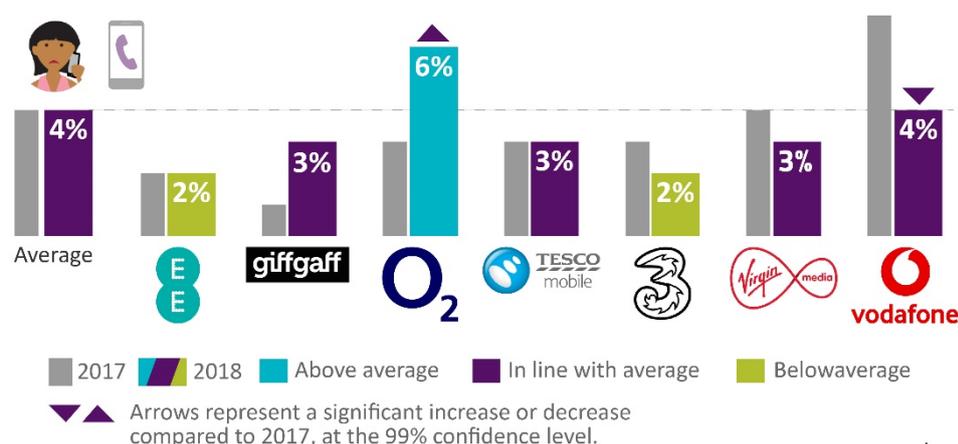
## Reasons to complain and complaints volumes<sup>20</sup>

Four per cent of mobile customers said they had a reason to complain about their mobile service or supplier in 2018,<sup>21</sup> unchanged compared to 2017. O2 customers were more likely than average to have had a reason to complain in 2018 (6%) (double the proportion in 2017), likely reflecting the O2 network outage in December 2018;<sup>22</sup> nevertheless, O2 customers' overall satisfaction with their service was in line with the average. Compared to 2017, the proportion of Vodafone customers with a reason to complain decreased (from 7% in 2017 to 4% in

2018). EE customers were less likely than average to have had a reason to complain in 2018.

Where mobile customers did have a reason to complain, the most common reason was that their service was not performing as it should (67%); for example, because of poor connection quality, loss of service, inability to use 2G, 3G or 4G, or text or voice mails being delivered late, while the proportion with a billing, pricing or payment issue, has decreased since 2017 (19% from 37%).

Figure 7: Proportion of mobile customers who had a reason to complain in the past 12 months, (whether or not they went on to make a complaint), by provider



Source: [Ofcom Comparing Service Quality research 2018; reason to complain](#) (see note C in Annex 1 for more details).

<sup>20</sup> Refer to Annex 2 for details of market research methodology.

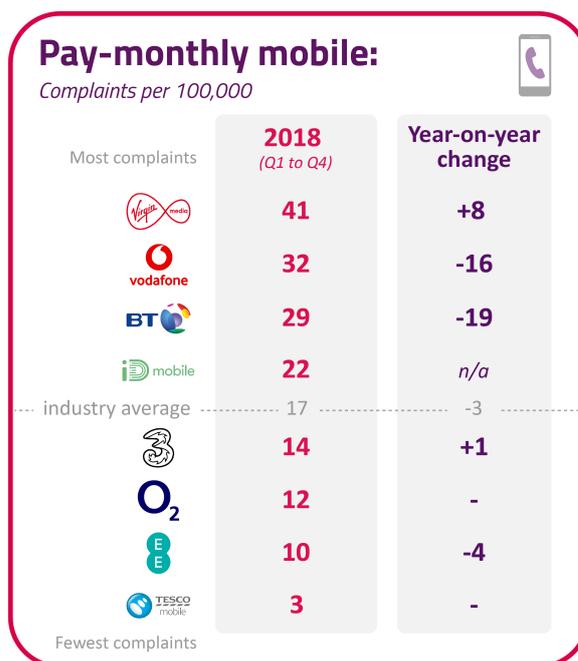
<sup>21</sup> Fieldwork was conducted in December 2018, therefore reasons to complain date back to December 2017.

<sup>22</sup> O2's network outage was 6 December 2018. Ofcom's *Customer complaints research: Reason to complain* fieldwork was carried out between 5-16 December 2018.

## Complaints to Ofcom

For the second consecutive year, Tesco Mobile generated the fewest complaints per 100,000 subscribers for pay-monthly mobile services, while Virgin Mobile generated the most complaints per 100,000 subscribers (41). The average number of complaints per 100,000 subscribers across all of the major providers fell from 20 to 17 during the year.

Figure 8: Pay-monthly mobile complaints per 100,000 subscribers: 2018<sup>23</sup>



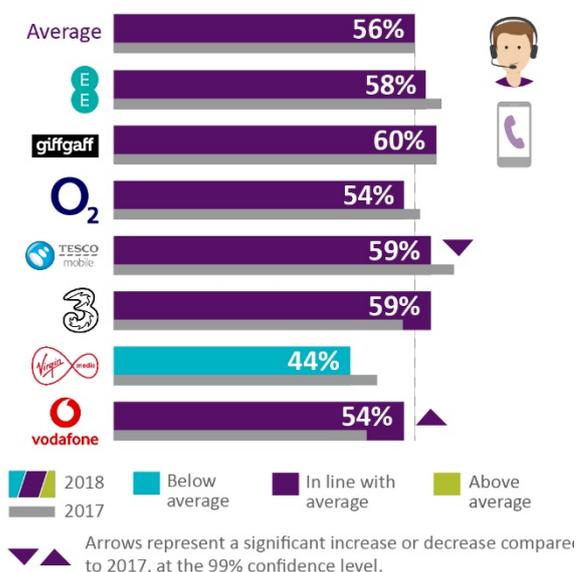
Source: Ofcom CCT data.

Notes: All figures are rounded to the nearest whole number; the industry average relates only to the providers included in the analysis.

## Complaints handling

Virgin Mobile customers were less likely than average to be satisfied with how their complaint was handled. Fifty-six per cent of mobile customers who made a complaint to their provider were satisfied with how their complaint was handled, in line with 2017. Tesco Mobile customers were less likely to be satisfied with how their complaint was handled (59% vs. 67% in 2017), while Vodafone customers were more likely (54% vs. 47% in 2017).

Figure 9: Overall satisfaction with mobile complaints handling



Source: Ofcom Comparing Service Quality research 2018; complaints handling (see note D in Annex 1 for more details).

Notes: Arrows represent a significant increase or decrease compared to 2017.

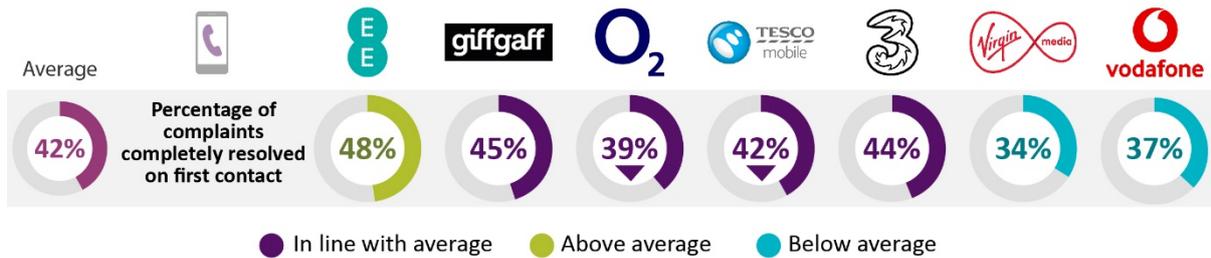
<sup>23</sup> Ofcom reports on the number of complaints generated by the major mobile providers for pay-monthly services each quarter but does not report on pay-as-you-go mobile services due to low complaint volumes.

Forty-two per cent of those who made a complaint about their mobile phone service or supplier reported that it was resolved on first contact with their provider, in line with 2017. EE customers were more likely than average to report their complaint was resolved on first contact (48%), while Virgin

Mobile (34%) and Vodafone (37%) customers were less likely to.<sup>24</sup>

Compared to 2017, O2 and Tesco Mobile customers were less likely to report that their complaint was completely resolved on first contact.

Figure 10: Proportion of mobile complaints resolved on first contact



Source: *Ofcom Comparing Service Quality research 2018; complaints handling* (see note E in Annex 1 for more details).

Notes: Arrows represent a significant increase or decrease compared to 2017. Blue and green shading indicates that the figure is higher or lower than the sector average.

## Complaints 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 one of two alternative dispute resolution (ADR) schemes that handle broadband, landline and mobile complaints: [Ombudsman Services](#) (OS) and [Communication and Internet Services Adjudication Scheme](#) (CISAS).<sup>25</sup>

For the third successive year billing was the most commonly referred mobile complaint to ADR schemes. Service quality issues was second for most of the major providers.

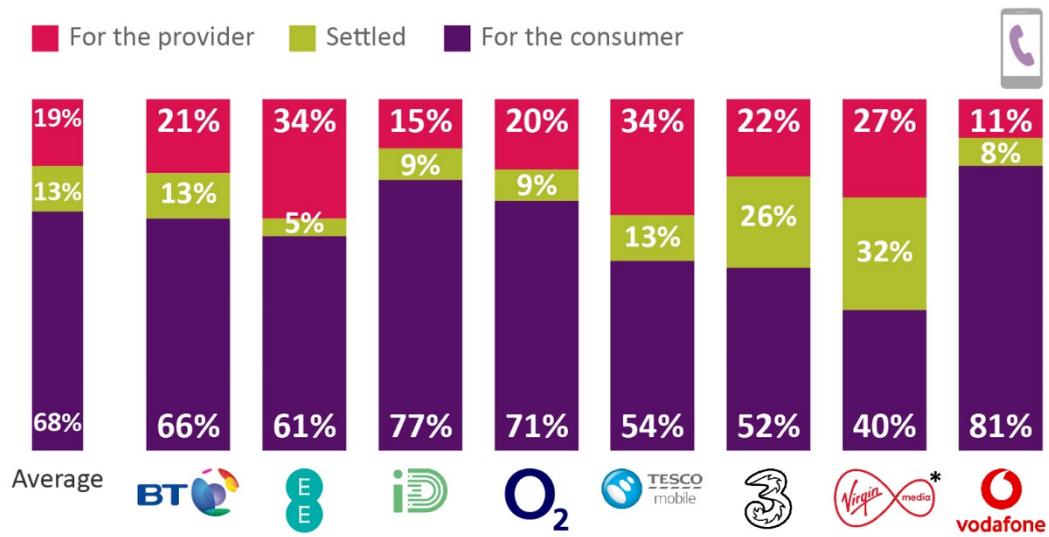
Eighty-one per cent of mobile complaints considered by the ADR schemes were settled<sup>26</sup> or found in favour of the customer. Vodafone (81%) had the highest proportion of complaints found in favour of the customer. Virgin had the highest percentage of settled complaints (32%).

<sup>24</sup> Interviewing was conducted between 5 December 2018 and 14 January 2019 and complaints would have been made between June 2018 and January 2019. The timing of the complaint (during the 6-month period) and the resolution is not comparable across respondents.

<sup>25</sup> Both schemes publish data summarising the complaints they receive each quarter, broken down by provider. This information can be found on their websites.

<sup>26</sup> Settled refers to cases resolved with the agreement of both the communications provider and the consumer without the need for an investigation.

Figure 11: ADR Case outcomes for the largest mobile operators (2018)



Source: CISAS and OS data.

Notes: Some figures do not sum to 100% due to rounding. Those marked \* have a low base size.

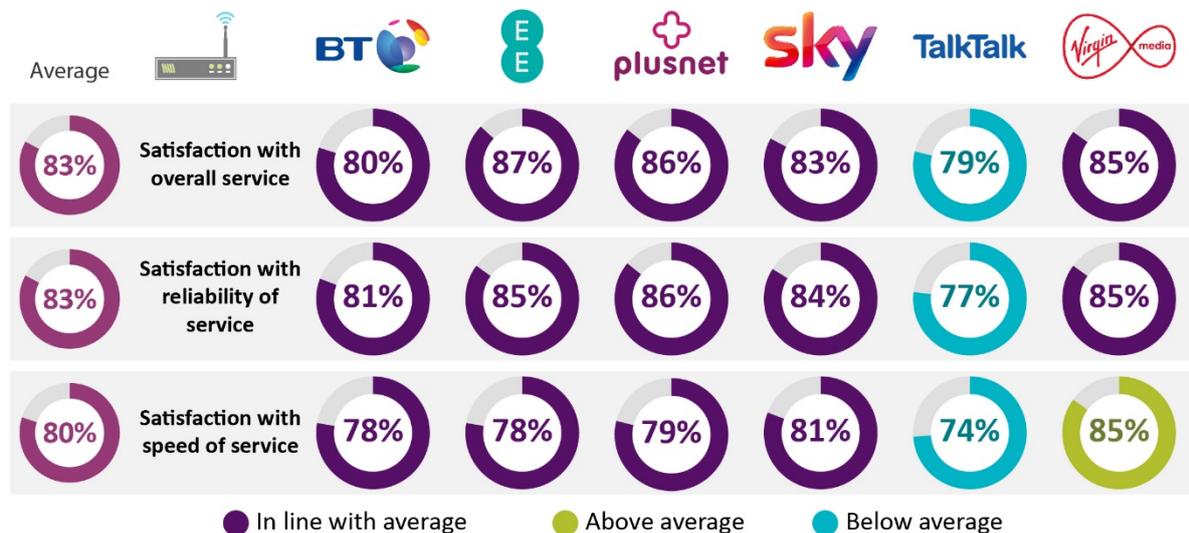
# Residential landline and broadband services

## Satisfaction

**Eighty-three per cent of broadband customers were satisfied with their overall service in 2019.** This was in line with 2018 (80%). Where customers said they were dissatisfied,<sup>27</sup> the top two reasons were poor or unreliable connectivity (55%) and slow speeds or speed not as advertised (47%). Satisfaction with the reliability of the broadband service has also remained in line with 2018 (83%), while satisfaction with speed (80%) has increased since 2018 (77%).

TalkTalk broadband customers were less likely than average to be satisfied with their overall service, the reliability of the service and speed of the service. Virgin Media broadband customers were more likely than average to be satisfied with the speed of their service, possibly reflecting the higher speed broadband packages that it offers.

Figure 12: Satisfaction with home broadband service



Source: [Ofcom Customer Satisfaction Tracker 2019](#) (see note F in Annex 1 for more details).

<sup>27</sup> 10% of customers said they were not satisfied with their broadband service overall.

**TalkTalk broadband customers were less likely than average to recommend their provider to a friend.** This is consistent with the lower than average levels of satisfaction reported above.

*Figure 13: Recommend to a friend: broadband providers*

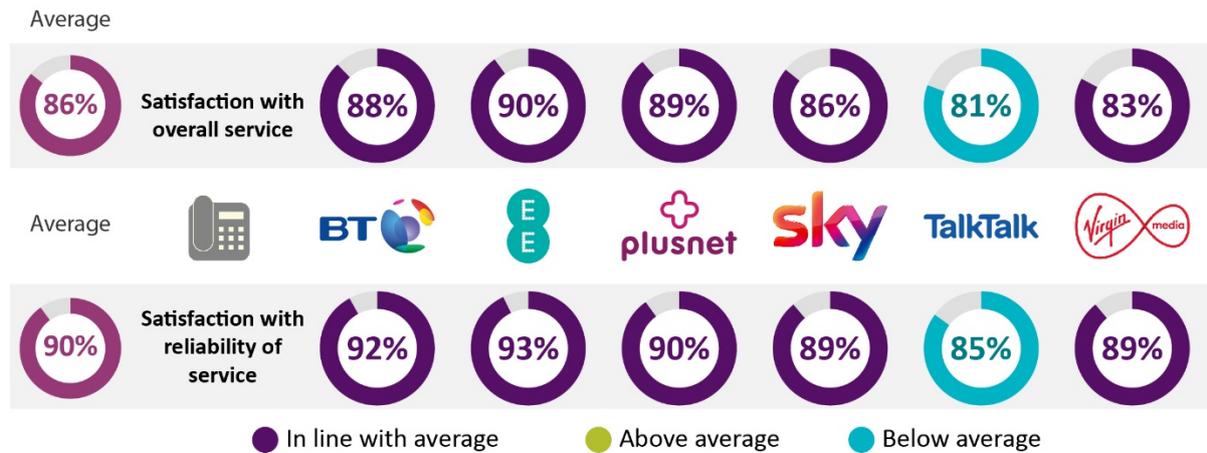
	2018	2019
More likely to recommend		
Broadband average		
Less likely to recommend		

*Source: Ofcom Customer Satisfaction Tracker 2019 (see note G in Annex 1 for more details).*

**TalkTalk customers were less likely than average to be satisfied with their landline service.** This was the case for both overall satisfaction and satisfaction with the reliability of the service.

Eighty-six per cent of landline customers were satisfied with their overall landline service, while 90% of landline customers were satisfied with its reliability. Both measures are in line with 2018 (87% and 90% respectively).

*Figure 14: Satisfaction with landline service*



*Source: Ofcom Customer Satisfaction Tracker 2019 (see note H in Annex 1 for more details).*

**TalkTalk landline customers were less likely to recommend their provider to a friend.**

Again, this is consistent with their lower-than-average satisfaction levels.

Figure 15: Recommend to a friend: landline providers

	2018	2019
<b>More likely to recommend</b>		
<b>Less likely to recommend</b>		<b>TalkTalk</b>

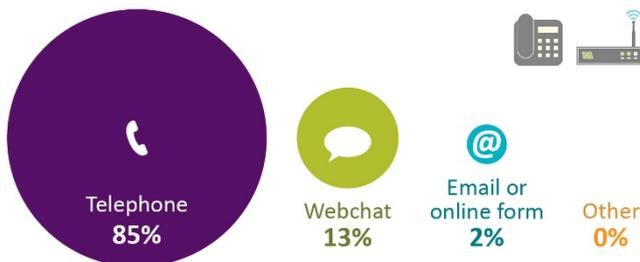
Source: *Ofcom Customer Satisfaction Tracker 2019* (see note 1 in Annex 1 for more details).

### Customer service

Telephone remains the most popular method of contact across all of the major landline and broadband providers,<sup>28</sup> accounting for an average of 85% of customer contacts.<sup>29</sup> The proportion of customer contacts to landline and broadband providers via webchat averaged 13% in 2018.<sup>30</sup>

broadband provider to offer in-app live webchat or ‘asynchronous messaging’, while TalkTalk, Sky and Virgin Media’s customer apps allowed users to track orders and monitor/schedule appointments with engineers.

Figure 16: Customer contacts by channel, landline and fixed broadband providers: 2018



Source: *Ofcom / provider data, 2018.*

**Most of the major fixed providers offered a dedicated mobile application for their customers in 2018.** The exceptions were KCOM, Plusnet and the Post Office. These apps offer a variety of functions to users: TalkTalk was the only landline and fixed

As with mobile providers, most landline and broadband providers responded to customer contacts made over social media; Facebook and Twitter were the most frequently used platforms. BT and KCOM also responded to customer questions and complaints via Instagram and LinkedIn. The Post Office was the only fixed-line provider not to respond to customers via social media.

Most providers attempted to address issues on the social media platform initially used to contact them but migrated the conversation to other channels (e.g. phone, email) where the query was complicated, or if account information was required.

<sup>28</sup> This statement relates to all fixed-line providers from whom Ofcom requested data on customer contacts by channel: BT, KCOM, Plusnet, the Post Office, Sky and Virgin Media.

<sup>29</sup> By ‘customer contact’ we mean a recorded instance when a residential customer interacts with a customer services agent or other employee to make an enquiry or complaint about their residential broadband or landline service. We have excluded interactions with mobile applications as it is not possible to measure the number of interactions with a customer services agent that originated within a mobile application.

<sup>30</sup> The proportion of customer contacts made over webchat varied considerably between providers, from a low of <1% for EE to a high of 24% for BT.

## Call waiting times and abandonment rates

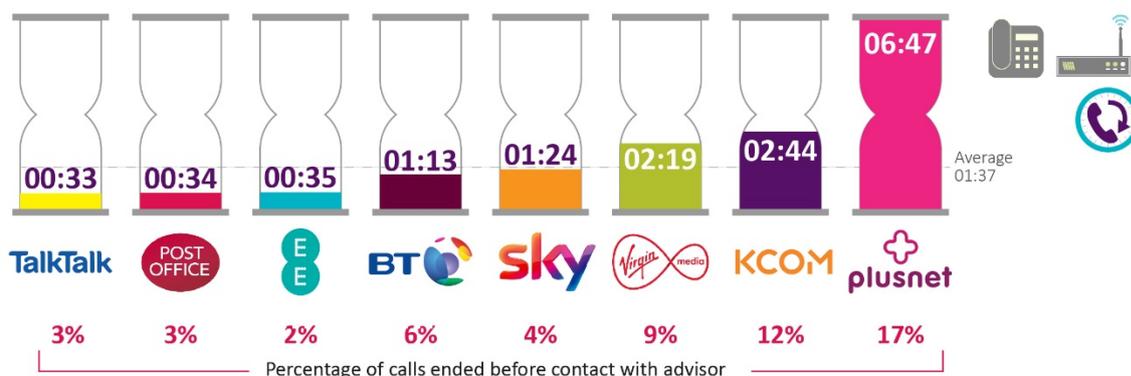
On average, landline and fixed broadband customers had to wait in a queue for one minute 37 seconds to speak to an advisor in 2018, a three-second fall since 2017 but still much longer than call waiting times for mobile providers (which averaged 52 seconds).

Among the major landline and broadband providers, TalkTalk, Post Office and EE customers had the shortest average waiting times, while Plusnet's had the longest average wait at nearly seven minutes. Plusnet customers experienced the largest variations in average monthly waiting times in 2018, ranging from under three minutes to over 13 minutes.

From September to November 2018, Plusnet customers had to wait longer than in other periods to speak to their advisors due to technical problems following the launch of a new billing platform on 1 September 2018.

On average, 6% of calls to major landline and fixed broadband providers ended while the customer was waiting in a queue, a one percentage point decline since 2017.<sup>31</sup> Abandonment rates are closely linked with call waiting times; EE, TalkTalk and Post Office, which had the shortest average call waiting times, also had the lowest proportions of calls that were ended when the customer was waiting to speak to an advisor (all 3%), while Plusnet had the highest proportion (17%).

Figure 17: Average call waiting times, landline and fixed broadband providers: 2018



Source: Ofcom / provider data, 2018.

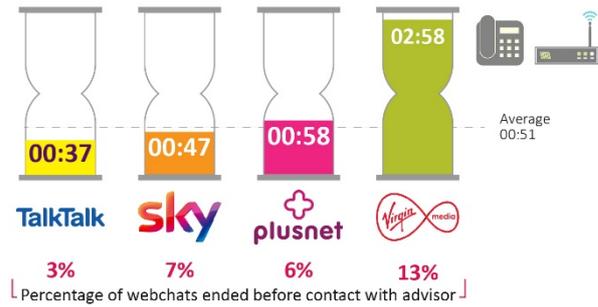
Note: Figures for BT include provider call-backs to customers.

<sup>31</sup> The 2017 average used for comparison did not include the Post Office.

## Webchat

All of the major fixed line providers except the Post Office offered a webchat facility to their customers in 2018. It took an average of 51 seconds for an agent to respond when a customer initiated a conversation via webchat; Virgin Media had the longest average time to respond (two minutes 45 seconds) and TalkTalk had the shortest average time (37 seconds).

Figure 18: Average agent response time to a customer-initiated webchat, landline and fixed broadband providers: 2018



Source: Ofcom / provider data, 2018.

Note: BT and EE figures are excluded as their pilot was launched only in the last quarter of 2019.

## Reasons to complain and complaints volumes<sup>32</sup>

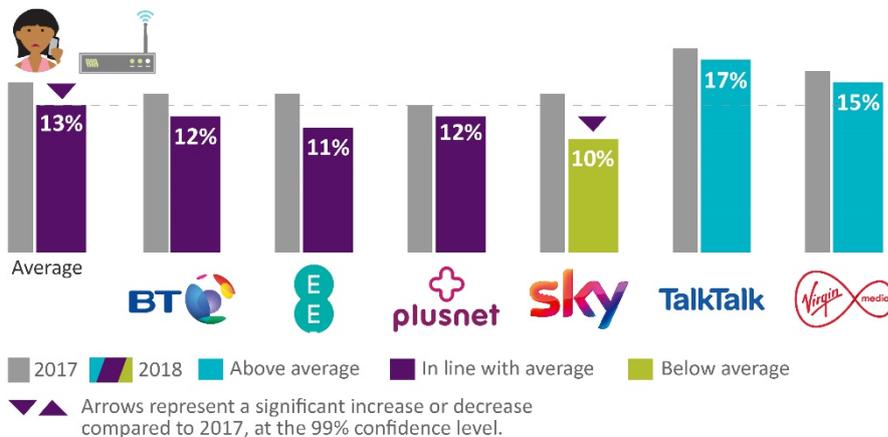
The proportion of broadband customers with a reason to complain fell in 2018, returning to 2016 levels after a corresponding increase in 2017. Thirteen per cent of broadband customers had a reason to complain in 2018, down from 15% in 2017.

The most common reason for customers to complain about their fixed broadband were service issues (84%) such as slow broadband speeds and intermittent or total loss of service, followed by billing, pricing or payment issues (12%).

The proportion of customers with a reason to complain about a problem with a repair fell from 9% in 2017 to 3% in 2018.

TalkTalk and Virgin Media customers were more likely than average to have had a reason to complain about their broadband service in 2018 (17% and 15% respectively), while Sky customers were less likely (10%). The proportion of Sky customers with a reason to complain has decreased since 2017 (from 14%).

Figure 19: 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



Source: Ofcom Comparing Service Quality research 2018; Reason to complain (see note J in Annex 1 for more details).

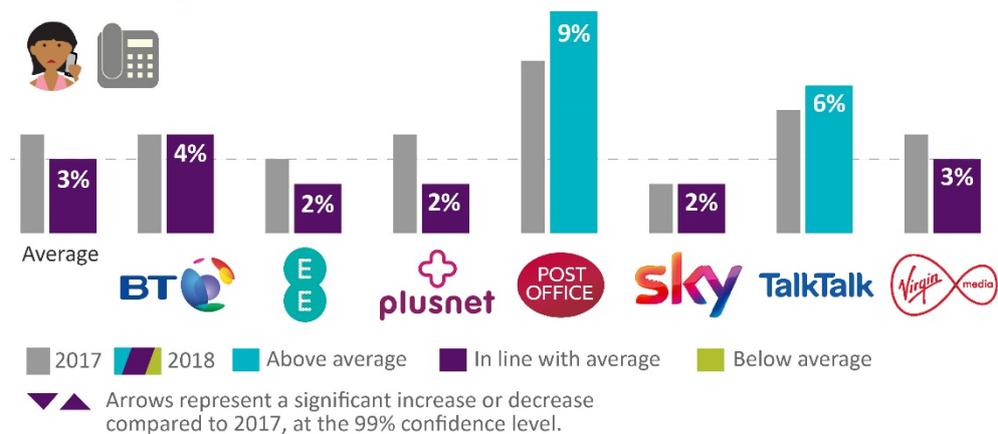
<sup>32</sup> Refer to Annex 2 for details of market research methodology.

**The proportion of customers with a reason to complain about their landline (4%) in 2018 remained unchanged since 2017.** The most common reasons for customers to complain about their landline service related to service issues (52%) such as loss of service, followed by billing, pricing or payment issues (23%).

Post Office and TalkTalk customers were more likely than average to have had a reason to complain about their landline service, while Sky customers were less likely.

Compared to 2017, the proportion of landline customers with a reason to complain about a problem with a repair decreased (7% vs. 18% in 2017).

**Figure 20: Proportion of landline customers who had a reason to complain in the past 12 months, (whether or not they went on to make a complaint), by provider**



**Source:** [Ofcom Comparing Service Quality research 2018: Reason to complain](#) (see note K in Annex 1 for more details).

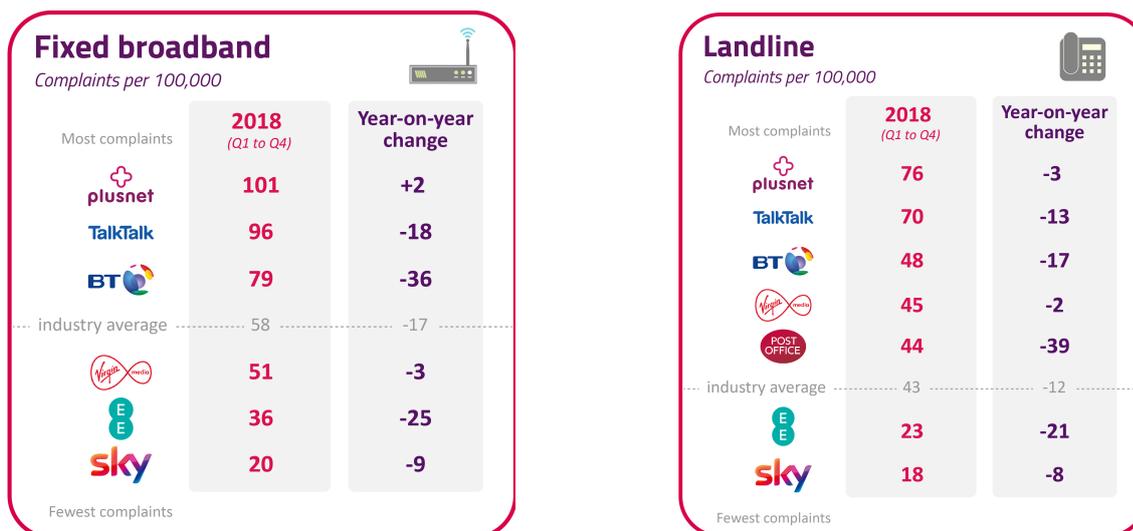
## Complaints to Ofcom

In 2018, for the second successive year, Sky generated the fewest complaints per 100,000 subscribers for both landline and broadband services. Conversely, Plusnet generated the most landline and the most broadband

complaints per 100,000 subscribers during the year.

Among the major fixed telecoms providers, the average number of landline and of broadband complaints per 100,000 customers fell in 2018 (from 54 to 43 for landlines and 75 to 58 for broadband).

Figure 21: Fixed broadband and landline complaints per 100,000 subscribers: 2018



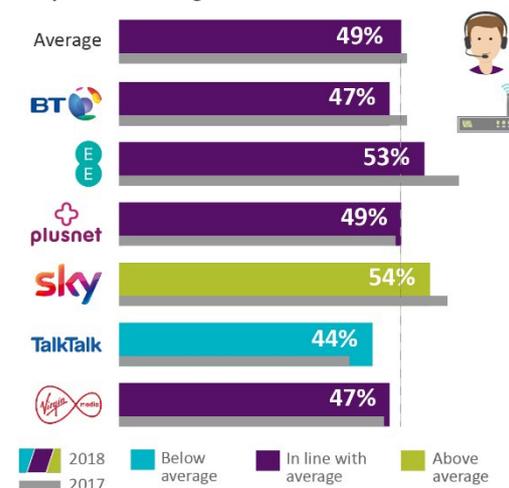
Source: Ofcom CCT data.

Notes: All figures are rounded to the nearest whole number; the industry average relates only to the providers included in the analysis in a particular year. The actual measurable difference between Virgin Media and Post Office's landline complaints per 100,000 subscribers is less than one and so their results should be considered comparable.

## Complaints handling

Half of broadband customers (49%) who complained to their provider in 2018 were satisfied with how their complaint was handled<sup>33</sup>, in line with 2017 (50%). Sky customers were more likely than average to be satisfied with how their complaint was handled, while TalkTalk customers were less likely to be satisfied.

Figure 22: Overall satisfaction with broadband complaint handling



Source: Ofcom Comparing Service Quality research 2018; Complaints handling (see note L in Annex 1 for more details).

<sup>33</sup> Interviewing was conducted between 5 December 2018 and 14 January and complaints would have been made between June 2018 and January 2019.

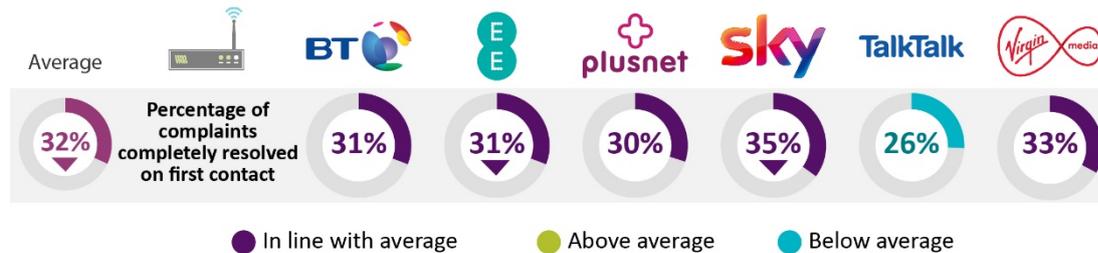
**The proportion of broadband complaints that were completely resolved on first contact decreased between 2017 and 2018.**

In 2018, a third (32%) of broadband customers who made a complaint said the issue was completely resolved on first contact with their provider. This was down from 35% in 2017, driven by falls in the proportion of

complaints resolved on first contact by EE (31% in 2018; 40% in 2017) and Sky (35% in 2018; 41% in 2017).

TalkTalk customers (26%) were less likely than average to say their complaint had been completely resolved on first contact with provider.<sup>34</sup>

**Figure 23: Proportion of broadband complaints resolved on first contact**

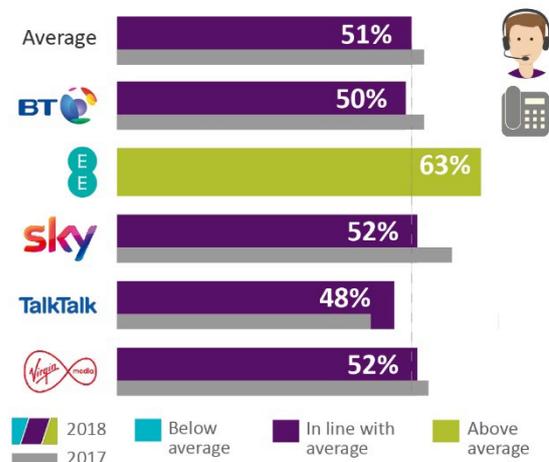


**Source:** *Ofcom Comparing Service Quality research 2018; Complaints handling* (see note M in Annex 1 for more details).

**Notes:** Arrows represent a significant increase or decrease compared to 2017. Blue and green shading indicates the figure is higher or lower than the sector average.

**Sixty-three per cent of EE landline customers were more likely than average to be satisfied with how their complaint was handled, higher than the 51% sector average. Overall satisfaction with landline complaints handling was in line with 2017.**

**Figure 24: Overall satisfaction with landline complaint handling**



**Source:** *Ofcom Comparing Service Quality research 2018; Complaints handling* (see note N in Annex 1 for more details).

**Note:** There is no data available for EE in 2017.

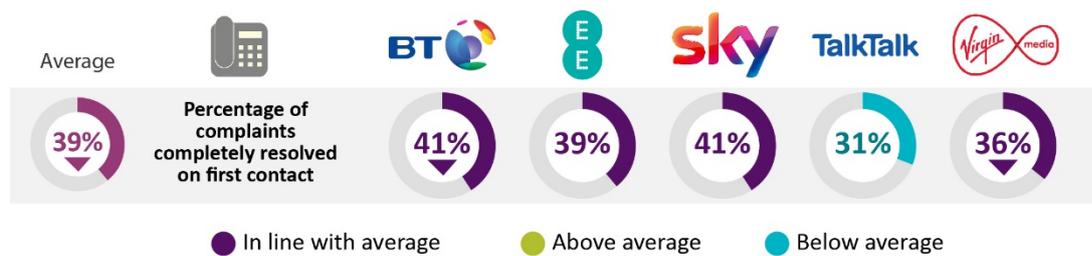
<sup>34</sup> Interviewing was conducted between 5 December 2018 and 14 January and complaints would have been made between June 2018 and January 2019. The timing of the complaint (during the 6-month period) and the resolution is not comparable across respondents.

**The proportion of landline complaints completely resolved on first contact has decreased since 2017.** Thirty-nine per cent of landline customers who made a complaint said their complaint was completely resolved on first contact with their provider, lower than in 2017 (45%).

This was driven by BT and Virgin Media whose customers were less likely to report that their complaint was completely resolved on first contact compared to 2017 (48% and 43% respectively in 2017).

TalkTalk customers (31%) were less likely than average to say that their complaint had been completely resolved on first contact.<sup>35</sup>

Figure 25: Proportion of landline complaints resolved on first contact



Source: [Ofcom Comparing Service Quality research 2018; Complaints handling](#) (see note O in Annex 1 for more details).

Notes: Arrows represent a significant increase or decrease compared to 2017. Blue and green shading indicates the figure is higher or lower than the sector average.

## Complaints taken to an alternative dispute resolution scheme

As in 2017, service quality issues (e.g. loss of service, disconnections and broadband speeds) accounted for the highest proportion of overall complaints taken to ADR schemes for most of the major broadband and landline providers in 2018. The exceptions were Sky and Virgin Media, for whom it was billing.

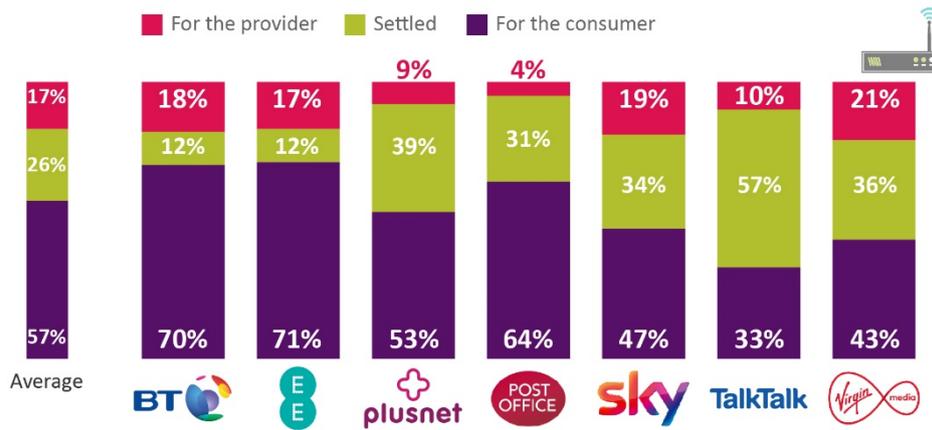
On average, 83% of **broadband** complaints were either settled or found in favour of the customer. EE (71%) had the highest proportion of complaints found in favour of

the customer, while TalkTalk had the highest proportion of settled complaints (57%).

The industry average for **landline** complaints that were found in favour of the customer or settled was 82% in 2017. KCOM had nine ADR landline complaints in total, all of which were found in favour of the customer, with BT (68%) having the next highest proportion in favour of the consumer. TalkTalk had the highest proportion of settled complaints (56%).

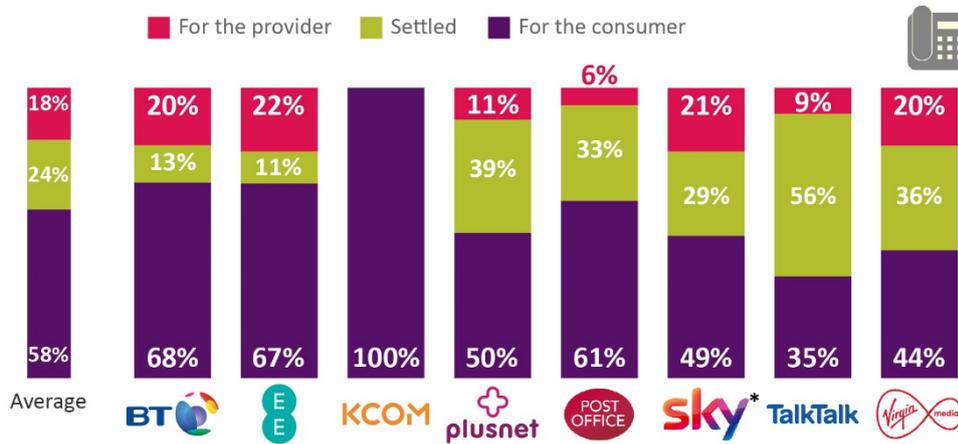
<sup>35</sup> Interviewing was conducted between 5 December 2018 and 14 January and complaints would have been made between June 2018 and January 2019. The timing of the complaint (during the 6-month period) and the resolution is not comparable across respondents.

Figure 26: ADR case outcomes for the largest broadband providers (2018)



Source: CISAS and OS data. Some figures do not sum to 100% due to rounding. These are marked with a \*.

Figure 27: ADR case outcomes for the largest landline providers (2018)



Source: CISAS and OS data. Notes: Some figures do not sum to 100% due to rounding. These are noted with a \*. KCOM had <10 cases reaching ADR schemes.



# Provisioning and faults

## Getting a new service<sup>36</sup>

Customers expect their service to be installed quickly and on the date agreed. Any changes should be clearly communicated and managed by the provider.

**Overall, 93% of all landline and broadband orders were delivered by the date agreed with the customer in 2018.** This figure includes any rearrangements agreed in advance and was slightly lower than in 2017 (94%). When a customer was moving home and staying with the same provider, 88% of orders were delivered by the date agreed; this lower proportion may relate to the unpredictability of moving dates.

On average, it took 15 days for a landline or broadband order (whether it be a new service, home move or change to service) to be delivered in 2018.

This was a slight increase on the 13-day average in 2017. Overall there was little difference in the average number of days it took providers to deliver a new service, averaging 12-16 days across all providers except Plusnet, which took an average of 19 days.

On average it took a day longer to deliver a new service in a rural area than in an urban area.

The type of provisioning event can impact the time taken to deliver a new service. These are categorised as: obtaining a new service from a new provider; moving to a new house and staying with your provider; and changing the service you currently receive from your supplier (such as moving to a higher speed service).

Figure 28: Average days to deliver a service, from order to delivery

	Average	BT	E E	KCOM	plusnet	POST OFFICE	sky	TalkTalk	Virgin media
Average delivery days	15	13	12	15	19	16	14	16	14

Source: Ofcom / provider data, 2018.

<sup>36</sup> For further details on the providers included and the methodology used see Annex 3.

Figure 29: Average days to deliver a new service, changes to the service or moving home

	Openreach				
	BT	E E	POST OFFICE	TalkTalk	Virgin media
New service	15	16	16	17	15
Home move	17	18	17	16	13
Changes in service	9	7	15	14	8

Source: Ofcom / provider data, 2018.

Note: Sky data did not record Home Move details. KCOM and Plusnet were not able to provide provisions by event.

**Full-fibre services on average took four days longer to be delivered than other broadband services.** Full Fibre is still a relatively new deployment technology with a more complex installation process, reflected in the higher number of days to deliver. New equipment is needed to reach the home, and within the home, to support the service.

**Landline and broadband providers completed the vast majority of orders within four weeks.** Ofcom’s rules require that switches between providers on the Openreach or KCOM networks take a minimum of ten working days, which means that there is at least a ten-working-day wait for such orders to be completed.<sup>37</sup> This rule does not, however, apply to home moves, changes in service or moves to/from Virgin Media and other networks.

**A small minority of orders took more than four weeks to be delivered.** In 2018, 5% of orders (around 400,000 in 2018) took more than four weeks to be delivered. Less than 1% of new installations took more than eight weeks to be completed in 2018.

Providers reported that installations which took longer than four weeks were frequently delayed due to street works (road opening issues, wayleaves) or issues with building the network to the customer (access to land and property). Data provided by Virgin Media and KCOM indicates that the higher proportion of installations that took over four weeks was due to longer timelines for full-fibre connection. We were not able to ascertain why Plusnet had more installations that took longer than four weeks compared to other providers using the Openreach network.

Figure 30: Average days to deliver a service, by technology

Technology	Average delivery days
ADSL	15
FTTC	13
Cable (DocSIS)	14
Full fibre	18
Landline	15

Source: Ofcom / provider data, 2018.

<sup>37</sup> This is so that a consumer can ‘stop the switch’ if they have not agreed to it or have changed their mind.

Ofcom, the Government, local authorities and providers have been working to improve the process in preparation for the migration to ultrafast full-fibre broadband services.<sup>38</sup> This work has been through the DCMS-led ‘Busting Barriers Task Force’ and has resulted in the publication of a series of guides and advice notes for communications providers seeking to deploy new connections or networks.<sup>39</sup> The Government has also consulted on further legislative measures to make such deployment easier.

Figure 31 Percentage of landline and broadband services provided within four weeks of the order date, and average number of days taken: 2018

	Openreach							
	BT	E E	plusnet	POST OFFICE	sky	TalkTalk	KCOM	Virgin media
One week	28%	32%	7%	1%	17%	4%	10%	38%
Two weeks	68%	57%	37%	48%	64%	57%	62%	69%
Three weeks	89%	94%	80%	96%	95%	95%	81%	83%
Four weeks	94%	97%	90%	96%	95%	95%	87%	90%
More than four weeks	6%	3%	10%	4%	5%	5%	13%	10%
Average delivery days	13	12	19	16	14	16	15	14

Source: Ofcom / provider data, 2018.

## Missed appointments

Timeslots for provisioning and repair offered by providers were broadly consistent in 2018, as many providers used Openreach’s standard 8am-1pm or 1pm-6pm timeslots. Several operators also used third-party Qube engineers who offered two-to-three-hour slots, while Sky and TalkTalk also offered two-to-three-hour timeslots when using their own rather than Openreach engineers.

The proportion of missed appointments by Openreach engineers, for both installations and repairs, has remained broadly stable since 2017.

Figure 32 Proportion of missed appointments by Openreach, by appointment type: 2016-2018

Openreach network	2016	2017	2018
Installation	3.6%	1.9%	1.9%
Repair	2.8%	1.8%	1.8%

Source: Ofcom analysis of provider data, 2018.  
 Notes: 2018 data was derived from information provided by both Openreach as well as individual operators whereas data for previous years it was solely collected from operators. As a result, data is not directly comparable between these years.

<sup>38</sup>See [DCMS Barrier Busting Taskforce](#).

<sup>39</sup>See [Resources for communications network providers](#).

In 2018, Virgin Media missed 0.1% of all engineer appointments for installations, down from 0.4% in 2017. The proportion of engineer-missed repair appointments increased slightly from 0.3% in 2017 to 0.4% in 2018<sup>40</sup>.

**Figure 33: Proportion of missed appointments by Virgin Media, by appointment type: 2016-2018**

Virgin Media	2016	2017	2018
Installation	0.6%	0.4%	0.1%
Repair	0.2%	0.3%	0.4%

**Source:** Ofcom analysis of provider data, 2018.

As with previous reports, we have been unable to report on fault frequency and repair times by provider as each provider has different data collection systems and processes in place, making it difficult to obtain comparable results. We have used new information gathering powers to require providers to start collecting new data on faults, the provision of new services, and missed appointments from this year onwards.

Our 2020 Comparing Service Quality report will therefore include details of automatic compensation, additional data on faults and their repair times and more detailed information on installations and missed appointments.

<sup>40</sup> As per previous [reports](#) 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 whereas Virgin Media class an appointment as missed if it does not take place on the scheduled day.



# Social media posts about telecoms providers

To gain further insight into customers' views about service quality and to help us understand and explore any concerns and complaints raised on social media about fixed and mobile telecoms providers, we commissioned Ipsos MORI to analyse public Twitter and Facebook posts<sup>41</sup> for ten fixed and mobile telecoms providers made during 2018.<sup>42</sup>

Over 95 thousand public Twitter posts (excluding retweets) and Facebook posts were analysed. The posts collected included those that were made directly to providers, posts that were made about providers and posts made by providers. Facebook data could only be collected from the public Facebook pages for each of the providers and therefore

includes posts that were made directly on provider public pages, but not private posts that discussed providers. A full report outlining the research's findings can be accessed on our [website](#).

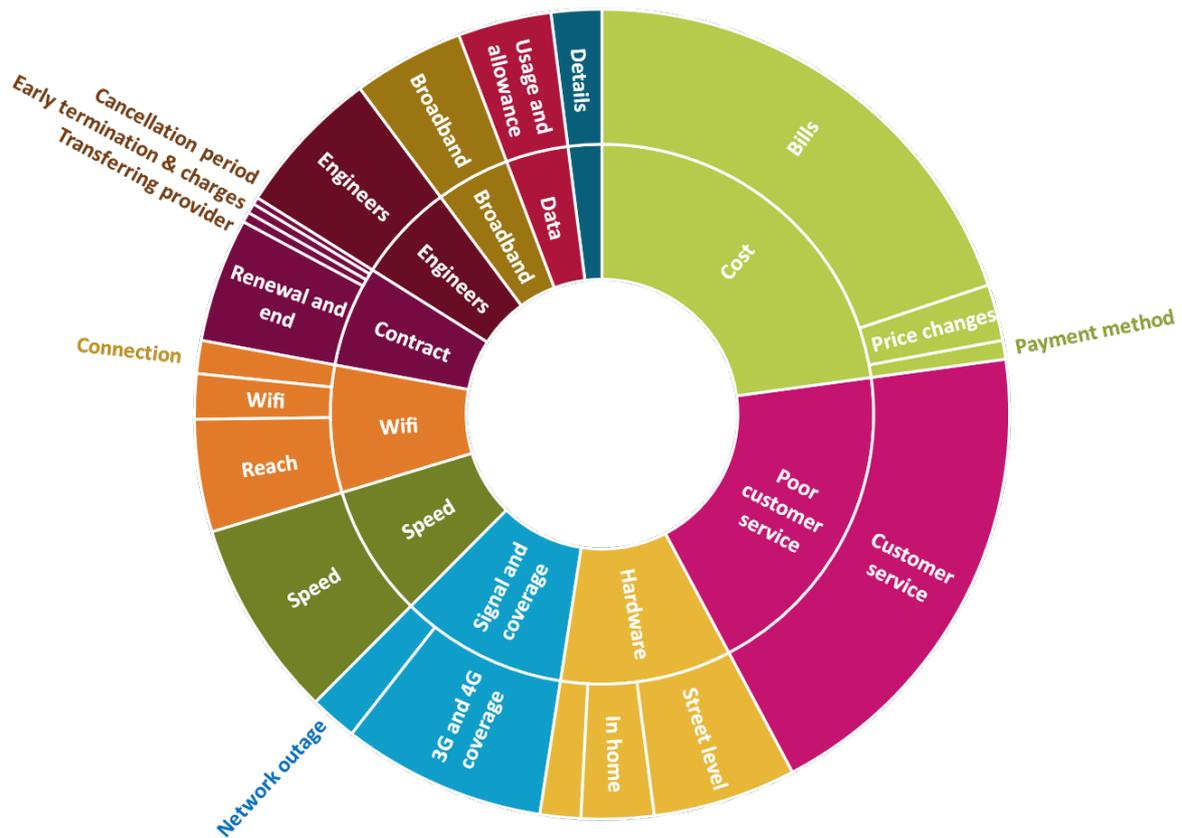
**The most common issues consumers discussed were related to customer service and price or billing issues.** Posts about customer service were most likely to be contain emotive language and were also most likely to mention Ofcom. Posts about price mainly related to bills although there was a smaller proportion referring to price changes and payment methods. The topic wheel in Figure 34 illustrates the variation in the online consumer conversation about fixed and mobile telecoms providers.

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<sup>41</sup> Research was focussed on Twitter and Facebook, reflecting the large user bases of these social media platforms, and due to the ability to extract public data via their application program interfaces (APIs).

<sup>42</sup> The ten major telecoms providers were BT, EE, O2, Openreach, Plusnet, Sky, TalkTalk, Three, Virgin Media and Vodafone. Openreach is excluded from the overall findings as they are not consumer facing.

Figure 34: Topic wheel relating to consumer concerns on telecoms providers: 2018



**Source:** Ipsos MORI analysis of UK Twitter and Facebook posts, 2018

**Note:** This topic wheel contains a subset of the topics identified by the overall the topic model, selected based on their relevance to consumer issues. The data within each topic reflects consumer only posts, excluding retweets and posts categorised as being made by providers.

**Posts about Plusnet, TalkTalk and Vodafone were most likely to be about poor customer service,** although poor customer service was an issue for all providers. Poor customer service refers to complaints about time taken to resolve an issue, but also quality of customer service interactions.

**Among mobile providers, Three was most likely to be mentioned in posts about signal, coverage and data.** This was despite O2 having a major outage in December, which accounted for 8% of the total number of posts across all providers in 2018, and 53% of all posts about O2.

Figure 35: Proportion of posts by topic area (excluding retweets), by provider: 2018<sup>43</sup>

	All providers	BT	E E	O <sub>2</sub>	plusnet	sky	TalkTalk	3	Virgin media	vodafone
Posts/100,000 lines/subscriptions	103	82	68	137	319	105	93	74	112	126
Poor customer service	38%	40%	33%	30%	50%	34%	46%	34%	37%	47%
Costs and contracts	20%	20%	21%	18%	26%	18%	23%	21%	15%	24%
Broadband and speed	13%	20%	11%	2%	16%	19%	18%	7%	8%	11%
Signal, coverage and data	11%	4%	25%	25%	4%	5%	4%	30%	5%	16%
Wifi	7%	7%	7%	6%	9%	5%	8%	7%	7%	6%
Hardware	6%	10%	4%	1%	6%	7%	8%	3%	6%	3%
Engineers and diagnosing issues	5%	9%	2%	1%	8%	6%	10%	1%	5%	3%

Source: Ipsos MORI

Note: Factor analysis was used to group together related topics from the topic model, based on the likelihood that they occur near each other within individual posts. Of the topic areas identified, seven were more directly related to consumer issues and are included in the table above.

We calculated the number of posts per 100,000 residential landline, broadband and post-pay mobile phone connections.<sup>44</sup> The findings were broadly consistent with the findings elsewhere in this report. For example, Plusnet (which had the highest numbers of complaints to Ofcom per 100,000 landline and broadband customers in 2018) had the most social media posts per 100,000 customers and the highest proportion of posts that related to bad customer service (50%).

**Social media activity is highly influenced by events such as service outages.** Our analysis captured an average of 204 tweets about UK communications providers per day.<sup>45</sup> There was a significant spike in activity on 6-7 December 2019 relating to O2's network outage which generated 5,746 postings, accounting for 8% of the total number of posts across all providers in 2018, and 53% of all posts about O2. Customer posts at this time tended to ask for clarification on the issue, share experiences of areas where mobile signal did not appear to be working, and request compensation.

<sup>43</sup> Posts can relate to more than one topic, so the totals may add up to more than 100%.

<sup>44</sup> The denominator was calculated as the number of residential landline customers (including calls-only customers) plus the number of residential fixed broadband lines and the number of residential pay-monthly mobile phone subscriptions. It should be noted that these figures may be slightly overstated as businesses may also make social media posts.

<sup>45</sup> 74,379 tweets (excluding re-tweets) were made from 1 January to 31 December 2019.

In addition, posts relating to the O2 service outage, figure 36 highlights spikes in customer posts for EE, Vodafone, Sky, Virgin Media, BT and Plusnet. These spikes emphasise short-term problems in delivery of telecoms services, largely driven by service outages:

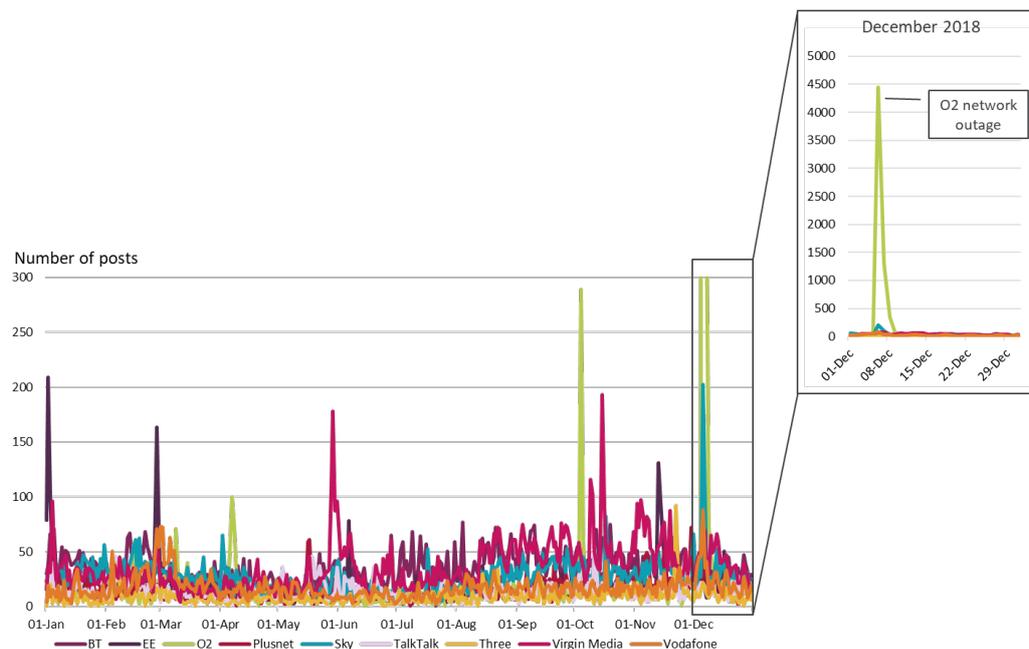
- Mobile signal outage or widespread problems with broadband connections are the most common cause of spikes in customer posts,<sup>46</sup>
- The largest spike for EE related to downtime in its customer service platforms (such as the chatbot service and telephone lines) in early January. This was preventing customers from paying bills or following up on existing issues that they had previously raised with the customer service team.

**Providers often communicate using apologetic language and look to invite further communication or suggest solutions.**<sup>47</sup> Provider posts referred to a range of common communication methods including webchat, private message, email and phone. Webchat and private message were the most frequently mentioned.

"We are sorry for any inconvenience this has caused and we are glad you have now got this sorted. Please PM us your mobile number and we can raise your feedback internally for further training to avoid this issue in future."

*Provider Facebook post*

**Figure 36: Customer social media posts over time, by provider: 2018**



**Source:** Ipsos MORI analysis of UK Twitter and Facebook posts, 2018

<sup>46</sup> These issues explain spikes in the online conversation for EE on 27 February, Sky on 2 April, Virgin Media on 29 May and 15 October, and O2 on 4 October.

<sup>47</sup> Based on the full data set excluding retweets.

# Annex 1: Consumer research source details

## Note A

**M2:** In terms of your mobile phone service, how satisfied are you with the overall service provided by (MOBILE PHONE SERVICE PROVIDER)? Would you say you are...

**Base:** All adults aged 16+ who are the decision maker and express an opinion on their mobile phone service (3078), receiving their service from EE (743), giffgaff (133), O<sub>2</sub> (694), Tesco Mobile (242), 3 (329), Virgin Mobile (170), Vodafone (428), on a contract (2306), on prepay (764). Providers used by fewer than 100 respondents are not shown individually but are included in the total. 'Don't know' responses have been excluded from the base.

**M3:** And how satisfied are you with the overall value for money of your service from (MOBILE PHONE SERVICE PROVIDER)? Would you say you are...

**Base:** All adults aged 16+ who are the decision maker who express an opinion on their mobile phone service where it is held as a standalone service/ not taken with another service from the same provider (2652), receiving their service from EE (658), giffgaff (130), O<sub>2</sub> (686), Tesco Mobile (240), 3 (323), Virgin Mobile (70), Vodafone (406). 'Don't know' responses have been excluded from the base.

**M4:** And how satisfied are you overall with the reception or signal strength that you get on your mobile phone service from (MOBILE PHONE SERVICE PROVIDER)? Would you say you are...

**Base:** All adults aged 16+ who are the decision maker and express an opinion on their mobile phone service (3079), receiving their service from EE (743), giffgaff (134), O<sub>2</sub> (693), Tesco Mobile (242), 3 (329), Virgin Mobile (170), Vodafone (428), on a contract (2308), on prepay (763). Providers used by fewer than 100 respondents are not shown individually but are included in the total. 'Don't know' responses have been excluded from the base.

## Note B

**QN2:** Based on your overall experience of (MOBILE PHONE SERVICE PROVIDER) as your mobile phone service provider, how likely would you be to recommend them to a friend or family member as a mobile phone service provider? Please give a rating on a scale of 0 to 10, where 0 is 'Extremely unlikely' and 10 is 'Extremely likely'?

**Base:** All adults aged 16+ who are the decision maker and express an opinion on their mobile phone service (3082), receiving their service from EE (744), giffgaff (134), O<sub>2</sub> (694), Tesco Mobile (242), 3 (329), Virgin Mobile (170), Vodafone (429), on a contract (2308), on prepay (766). Providers used by fewer than 100 respondents are not shown individually but are included in the total.

## Note C

**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?

**Base:** All UK households 16+ with mobile: average mobile (5689), EE (1380), giffgaff (262), O2 (1257), Tesco Mobile (474), Three (597), Virgin Mobile (428) and Vodafone (853).

## Note D

**Q9.** 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 have complained about mobile phone service in the last six months (3027), BT (604), EE (645), O2 (677), Tesco Mobile (306), Three (450), Virgin Mobile (198), Vodafone (532), giffgaff (219).

## Note E

**Q11:** In your opinion, was [Provider] able to successfully resolve your complaint? You said that your complaint was completely resolved, was it completely resolved on your first contact with [Provider]?

**Base:** All who have complained about mobile phone service in the last six months (3027), BT (604), EE(645), O2 (677),Tesco Mobile (306), Three (450), Virgin Mobile (198), Vodafone(532), GiffGaff (219).

## Note F

**IN2/IN5/IN4:** In terms of your fixed broadband service, how satisfied are you with the overall service/ reliability of your fixed broadband service / speed of service while online from (FIXED BROADBAND INTERNET PROVIDER)? Would you say you are...

**Base:** All adults aged 16+ who are the decision maker and express an opinion on their fixed broadband internet service (2395), receiving their service from BT (507), EE (136), Plusnet (124), Sky (602), TalkTalk (415), Virgin Media (448), those who say they have standard broadband (885), superfast broadband (1186), ultrafast broadband (160). Providers used by fewer than 100 respondents are not shown individually but are included in the total. 'Don't know' responses have been excluded from the base.

## Note G

**QN3:** Based on your overall experience of (FIXED BROADBAND PROVIDER) as your fixed broadband provider, how likely would you be to recommend them to a friend or family member as a fixed broadband provider? Please give a rating on a scale of 0 to 10, where 0 is 'Extremely Unlikely' and 10 is 'Extremely Likely'?

**Base:** All adults aged 16+ who are the decision maker and express an opinion on their fixed broadband internet service (2399), receiving their service from BT (507), EE (136), Plusnet (125), Sky (604), TalkTalk (416), Virgin Media (448), those who say they have standard broadband (886), superfast broadband (1187), ultrafast broadband (160). Providers used by fewer than 100 respondents are not shown individually but are included in the total.

## Note H

**L1:** I'd like to ask you some questions about your home landline service from (LANDLINE PROVIDER). In terms of your landline service, how satisfied are you with the overall service provided by (LANDLINE PROVIDER)? Would you say you are...**L3:** And how satisfied are you with the reliability of your landline service from (LANDLINE PROVIDER)? **IF NECESSARY:** By reliability, I mean being able to make a call when you need to, so getting a dialling tone? Would you say you are...

**Base:** All adults aged 16+ who are the decision maker and express an opinion on their landline service (2404), receiving their service from BT (779), EE (108), Plusnet (112), Sky (512), TalkTalk (372), Virgin Media (372). Providers used by fewer than 100 respondents are not shown individually but are included in the total. 'Don't know' responses have been excluded from the base.

## Note I

**QN1** Based on your overall experience of using (LANDLINE PROVIDER) for your landline service, how likely would you be to recommend them to a friend or family member as a landline provider? Please give a rating on a scale of 0 to 10, where 0 is 'Extremely unlikely' and 10 is 'Extremely likely'?

**Base:** All adults aged 16+ who are the decision maker and express an opinion on their landline service (2466), receiving their service from BT (790), EE (117), Plusnet (114), Sky (533), TalkTalk (377), Virgin Media (382). Providers used by fewer than 100 respondents are not shown individually but are included in the total.

## Note J

**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?

**Base:** All UK households with fixed broadband 16+: average broadband (5115), BT (1270), EE (234), Plusnet (197), Sky (1240), TalkTalk (592) and Virgin Media (1280).

## Note K

**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?

**Base:** All UK households 16+ with a landline: average landline (4887), BT (1809), EE (189), Plusnet (143), Post Office (99), Sky (985), TalkTalk (531) and Virgin Media (978).

## Note L

**Q9:** 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 have complained about Broadband service in the last six months (2898), BT (604), EE (204), Sky (624), TalkTalk (563), Virgin Media (695), Plusnet (208).

## Note M

**Q12:** You said that your complaint was completely resolved, was it completely resolved on your first contact with [Provider]?

**Base:** All who have complained about Broadband service in the last six months (2898), BT (604), EE (204), Sky (624), TalkTalk (563), Virgin Media (695), Plusnet (208).

## Note N

**Q9:** 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 have complained about landline service in the last six months (1933), BT (566), Sky (437), TalkTalk (340), Virgin Media (428), EE (162).

## Note O

**Q12:** You said that your complaint was completely resolved, was it completely resolved on your first contact with [Provider]?

**Base:** All who have complained about landline service in the last six months (1933), BT (566), Sky (437), TalkTalk (340), Virgin Media (428), EE (162).