Annex 2: Customer research sources

This annex sets out the scope and methodologies for the main sources of customer research Ofcom has drawn on for our analysis in the *Comparing Customer Service* report.

Changes to the trackers from 2022

The methodologies for the Reasons to Complain (RtC), Customer Satisfaction (CST) and Complaints Handling Trackers (CHT) have remained consistent compared to 2022 and therefore, we are able to compare data from all three trackers across the last two waves (2022 and 2024). We continue to consider online to be a proportionate alternative to face-to-face research for these trackers, as it allows us to cost effectively achieve robust samples of low incidence groups (i.e. people who say that they have a reason to complain or who have complained about their service, as opposed to general customers, and customers of smaller communications providers closer to our 4% market share inclusion criteria).

This approach means these data exclude standalone landline customers i.e. landline users who do not have home internet access (5% of all landline users[1]) and potentially under-represents lower internet users. It is also important to acknowledge any potential behavioural differences that a respondent might exhibit when completing a survey face to face versus completing a survey online. In particular, it is known that online panels can result in fewer responses in the top satisfaction/agreement category.

In 2024, we added Lebara for mobile across all three of our trackers, as Lebara had sufficient customers to achieve a robust sample size. We also removed Virgin Mobile from 2024 reporting as their customers were migrated to O2 in 2023.

Significance testing and error margin

Only providers with a stable residential market share of 4% or more are included in the analysis from these surveys.

As outlined in the main report, there are occasions where two (or more) providers have the same or a similar percentage to the sector average and/or other providers but are not noted as being statistically significant. This is due to a provider's unweighted base sizes (i.e. the number of interviews conducted) reflecting its share of the relevant market. Base sizes between the communications providers included in the three trackers in 2024, and across the markets considered in this report, varied from 1,349 customers for the provider with the largest market share to 102 with the smallest (over the threshold of 4% market share).

The reason for the varying levels of statistical significance is that the size of the sample impacts the level of confidence we can have in the data. A lower base size means there is a wider confidence interval and where two intervals overlap the difference is not considered significant. Where there is a larger sample of interviews, we can be more confident that the behaviour displayed, more

[1] Ofcom's 2024 Technology Tracker survey

accurately represents the likely behaviour of the populations we are looking to understand, as the confidence intervals are much smaller.

The table below (drawn from the Ofcom Reasons to Complain Tracker 2020) illustrates the difference the base size can have on the lower and upper confidence interval around a particular result.

In this example, BT Mobile (7%) appears to have the same percentage of customers who had a reason to complain about their provider as each of O2 and Tesco Mobile. However, unlike O2 and Tesco Mobile, BT Mobile is not showing as statistically significantly different from the total market average at a 95% level of confidence. This is due to the fact that BT Mobile has a lower base size (221) compared to Tesco Mobile (572) and O2 (1121). The lower base size of BT Mobile means that it has a wider confidence interval than that of the other providers e.g. BT Mobile has a range between 3% and 10% compared to O2 which has a range between 6% and 9%.

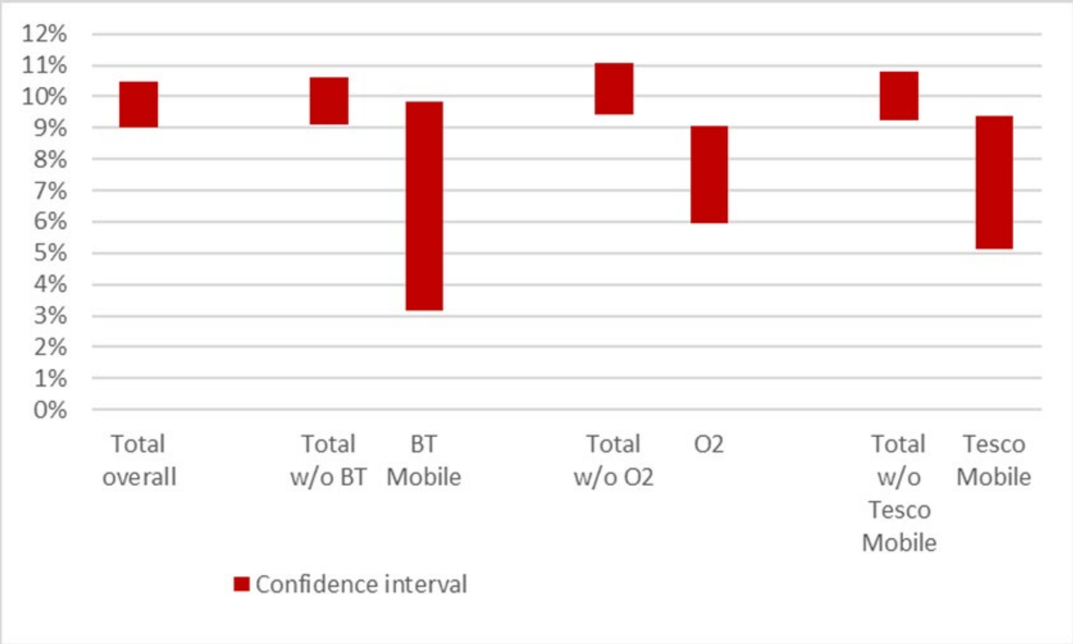
Figure 1: Proportion of BT Mobile, O2 and Tesco Mobile customers with a reason to complain in 2020

	Base	Mean	Upper	Lower	Confidence Interval (+/-)
Total	6246	10%	10%	9%	<1%
BT Mobile	221	7%	10%	3%	3%
O2	1121	7%	9%	6%	2%
Tesco Mobile	572	7%	9%	5%	2%

XX *Statistically significantly better than the sector average at the 95% confidence level for market research results / top performer for other data.*

Significance testing on the Customer Satisfaction and Reasons to Complain Tracker data included in this report (for in-year comparisons) is run by provider against the total market average, excluding that provider. As shown in the chart below (which again, draws upon Reasons to Complain 2020), larger providers such as O2 and Tesco Mobile have a proportionally larger impact on the market average than smaller providers, such as BT Mobile. Removing O2 from the average impacts the total more than removing BT Mobile. A significant result is indicated where there is no overlap between the provider result and the market average (excluding the result of that provider) when taking into account the respective error margins, therefore the result is significant for both O2 and Tesco Mobile at 95% significance.

Figure 2: Confidence intervals (at 95% significance) among BT Mobile, O2 and Tesco Mobile customers with a reason to complain in 2020



Q5. Which if any of the following services or suppliers have given you a reason to complain in the last 12 months? By mobile supplier
Unweighted base: BT Mobile (221), O2 (1,121), Tesco Mobile (572)

Comparing customer service research: Complaints Handling Tracker 2024

Since 2016, Ofcom has monitored levels of customer satisfaction with complaints handling in the mobile, landline and broadband markets. The core aim of this study is to monitor satisfaction with customer service during complaints handling among customers who complained to their provider in the six months prior to fieldwork.

As outlined in the Complaints Handling Tracker's technical report, we invite a sample demographically representative of the UK adult population to take part in the research, from which respondents are screened to select those who have made a complaint to a relevant provider within the six months prior to fieldwork. Fieldwork took place between 11 November 2024 and 6 January 2025. As such, the "previous six-months" time period referred to in the research corresponds broadly to complaints made to providers in the second half of 2024.

This research includes UK communications providers with a consistent market share of 4% or more (as at Q1 2024).

The data is presented at both a total sector level and at a provider level. Total sector level data is weighted using market share and incidence of complaints for each provider calculated from fieldwork data, in order to report total sector figures that best represent the make-up of complaints within each sector. Provider level data is unweighted.

Significance testing has been applied at the 95% confidence level both in year and for year on year comparisons.

In the *Comparing Customer Service* report, when we use the term "average" we are referring to the average of the providers included in the study (see report for providers included).

Data tables can be found at: Total level data tables and Provider level data tables.

Complaints Handling Tracker sample design

The research is conducted using an online panel and river sampling approach as we consider it to be the most cost-effective and efficient means to reach low incidence audiences (customers who have made a complaint to their communications provider).

In the absence of robust profiling data for this audience, we viewed this approach as the best method to ensure that the resulting sample was as representative of the sample target as possible in the circumstances.

The Complaints Handling Tracker has evolved over time and in 2019 questions were added that allowed us to identify respondents who have an impacting/limiting condition and/or are financially vulnerable.

On analysing data from 2019 and 2020, Ofcom identified a higher-than-expected proportion of respondents with at least one impacting/limiting condition and a lower-than-expected proportion of respondents aged 55 and over in the sample who complete the complaints handling survey.

We explored this in detail and as a result made a change to our approach to sampling in the 2021 wave by opening up the survey primarily to over 55-year-olds and adjusting the proportion of the sample derived from river versus panel sample sources from 35:65 to 50:50 during the first two weeks of fieldwork, in order to increase the opportunity for over 55s to participate. We then opened the survey up to respondents of all ages and reverted to a proportion of 35:65 for river versus panel sample sources during the remainder of the fieldwork.

This adjustment was repeated in the 2022 wave meaning the results can be compared year-on-year between 2021 and 2022 and we have used this approach again to allow for comparisons between 2022 and 2024 to be made.

Figure 3: Sample sizes by sector – 2024

Provider	Sample sizes by sector 2024			
	Landline	Fixed broadband	Mobile	Pay TV
BT	553	638		343
EE	235	376	739	276
giffgaff			256	
Lebara			167	
O2			868	
Plusnet	42	183		
Sky	561	740	172	774
TalkTalk	305	541		293
Tesco Mobile			322	
Three			490	
Virgin	422	762		525
Vodafone	166	243	581	

Comparing customer service research: Reasons to Complain 2024

Since 2009, Ofcom has been tracking the proportion of customers using a mobile, broadband and landline service who say they have had reason to complain about their provider in the previous 12 months.

In 2024, we continued to use the online methodology for the RtC that we first adopted in 2020.

The research was conducted via an online omnibus among a nationally representative sample of 6,349 adults aged 16+. The fieldwork took place between 20 and 26 of November 2024. As such, the last 12 months refers to the 12 months prior to fieldwork (November 2023 – November 2024). Given that the methodology is unchanged in this wave, we are able to compare the 2022 and 2024 data.

The specific objectives of the RtC are to explore whether consumers have had a reason to complain about their landline, broadband, mobile and/or pay TV provider in the last 12 months, and if so, to ascertain the reason for the complaint. In addition, to explore whether customers with a reason to complain went on to make a complaint; and, if they did, to which organisation they complained, or if they did not go on to make a complaint, why not. And, where sample size allows, to split information within each sector by communications provider.

Significance testing has been applied at the 95% confidence level in year and at the 99% confidence level for year-on-year comparisons.

The data are weighted to the national UK profile using target rim weights for gender, age, social class and region.

More information about the methodology and weighting can be found in the RtC Technical Note.

In the *Comparing Customer Service* report, when we use the term "average" we are referring to the average of all providers in the relevant sector.

Data tables can be found at: Reasons to Complain Data tables.

Comparing customer service research: Customer Satisfaction Tracker 2024

The Customer Satisfaction Tracker (CST) is Ofcom's key data source on levels of satisfaction across the communications markets. The aim of this study is to track and understand the attitudes of residential consumers (decision makers) to the quality of service they receive for each specific telecommunications service or product they purchase.

The study is designed to report on satisfaction at an overall level per market and by provider within market.

Between 2010 and 2016, customer satisfaction levels across these communications markets were monitored via questions on Ofcom's annual Switching Tracker (face to face methodology). In 2018, we moved the questions to a bespoke tracking study, the CST, and between 2018 and January/February 2020 the data was collected through a face-to-face study followed by a smaller online study.

In 2024, we continued to use the online methodology for the CST that we first adopted in 2020 in response to Covid-19 lockdown measures. The research was conducted via a bespoke online panel among a nationally representative sample of 2,585 UK adults, aged 16+. Fieldwork took place between 18 and 29 November 2024. Given that the methodology was unchanged in this wave, we are able to compare the 2022 and 2024 data.

Significance testing was applied at the 95% confidence level in year and at the 99% confidence level for year-on-year comparisons. More information about the methodology and weighting can be found in the CST Technical Note.

In the *Comparing Customer Service* report, when we use the term “average” in relation to levels of customer satisfaction with the service provided we are referring to the average of all providers in the relevant sector.

In the report we use the term ‘Recommend to a friend’ to show customer loyalty in the market. This measure is the Net Promoter Score™ (NPS™). The NPS™ is calculated by using the answer to a key question, using a 0-10 scale: Based on your overall experience of using (PROVIDER) for your (SECTOR) provider, how likely would you be to recommend them to a friend or family member as a (SECTOR) provider? Please give a rating on a scale of 0 to 10, where 0 is 'Extremely Unlikely' and 10 is 'Extremely Likely'? Respondents are grouped as follows: -Promoters (score 9-10) are loyal enthusiasts. -Passives (score 7-8) are satisfied but unenthusiastic customers. -Detractors (score 0-6) are unhappy customers. The NPS™ is calculated by subtracting the percentage of Detractors from the percentage of Promoters. The score can range from a low of -100 (if every customer is a Detractor) to a high of 100 (if every customer is a Promoter). Based on the global NPS standards, any score above 0 is considered “good”, 50 and above is considered excellent and 70 and above is considered “world class”.

Data tables can be found at: Customer Satisfaction Tracker Data tables.