

# Comparing customer service: mobile, home broadband and landline

Comparing Service Quality



# Overview

This is Ofcom's fourth annual report on how service levels compare in telecoms. We publish it to help people make informed decisions about which provider is best for them as part of our work to ensure fairness for customers.

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 and see what level of service they can expect from different providers. It also acts as an incentive for providers to improve their customer service.

This report covers customer experiences in 2019 and customer satisfaction levels in January 2020, before the Covid-19 pandemic came to the UK. The pandemic is likely to have affected the levels of service received by telecoms customers (in areas such as new services and repair times) and this impact will be covered in our next annual report, to be published in 2021.

## What we have found

- **Overall customer satisfaction with all three services (mobile, home broadband and landline) was in line with the previous year.**<sup>1</sup> However, there have been improvements in some areas. For example, complaints to us about telecoms companies continued to fall, as did the proportion of engineer appointments that were missed. New lines were being installed more quickly than in 2018, on average.
- **However, other aspects of customer service did not improve, and** average call waiting times increased. This is important, as phone calls remain the most common method of contacting providers.
- **There was little variation in customer satisfaction between providers for each service.** But Tesco Mobile customers had higher than average satisfaction for mobile and Plusnet had higher than average satisfaction for broadband, as did BT for landline.
- **Mobile users were happier overall with their service than broadband and landline customers.** They were more likely to recommend their provider to a friend, and less likely to have a reason to complain, than either landline or home broadband customers.<sup>2</sup>
- In 2019, **87% of new landline and broadband orders were delivered on the agreed date**, and it took an average of 11 days to get a new service installed (four days less than in 2018). Most providers took an average of two days to resolve faults where there was a total loss of service, and the majority were able to resolve nine out of ten of these faults within a week.

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<sup>1</sup> Customer satisfaction measured in January 2020 and compared with January 2019.

<sup>2</sup> In 2019, landline customers were less likely to have a reason to complain than broadband customers.

- The automatic compensation scheme has resulted in an increase in the amount of compensation paid to landline and broadband customers when things go wrong. Five providers – BT, Sky, TalkTalk, Virgin Media and Zen Internet – signed up to the scheme when it launched. Together they paid over £20.7m in automatic compensation over the six months between July and December 2019.

The information in this report has been collected through our own research, directly from the larger telecoms providers, and from third parties. The high-level findings in this report are supported by an [interactive data tool](#), which provides detailed information on how providers compare across all the data sets we have collected.

## Mobile phones<sup>3</sup>

### Summary

	Average mobile	BT	EE	giffgaff	i mobile	O <sub>2</sub>	sky	TESCO mobile	3	Virgin	vodafone
Satisfaction with service overall	93%	N/A	93%	95%	N/A	93%	N/A	97% ↑	89%	93%	90%
Customers with a reason to complain	3% ↓	3%	2%	2%	N/A	1% ↓	N/A	3%	6% ↑	3%	3%
Overall satisfaction with complaint handling	58%	N/A	59%	65%	N/A	59%	N/A	59%	60%	51%	52%
Average call waiting time (mm:ss)	1:18 ↑	0:34	0:57	N/A	1:43	0:43	2:06	0:35	2:37	1:35	1:12
Ofcom complaints per 100,000 subscribers	13 ↓	21	7	N/A	10	9	11	3	15	27	26

↑ ↓ Significantly higher or lower than the previous year (2018) for all data sources with the exception of Customer Satisfaction tracker, for which the previous year was 2019.

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

**XX** Statistically significantly worse than the sector average at the 95% confidence level for market research results / bottom performers for MI data.

- As in 2018, **more than nine in ten mobile customers (93%) were satisfied with the overall service** provided. Compared to the previous year, **Tesco Mobile customers were more satisfied with their overall service.**<sup>4</sup>

<sup>3</sup> 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. Ofcom's market research includes UK communications providers with a market share of c.4% or more. There are exceptions; providers that do not meet this level have been reported on if the base sizes are sufficient.

<sup>4</sup> Tesco Mobile and giffgaff use the O2 network and Virgin Mobile uses the EE network. Differences in satisfaction with network performance compared to these networks may be due to different geographic distribution of customers or, potentially, a halo effect.

- The average amount of time spent by mobile customers in a call queue was **1 minute 18 seconds** in 2019 (up by **25 seconds**). Of the major mobile providers, the **shortest average waiting time was from BT Mobile**, at 34 seconds, while the longest was from Three, at 2 minutes 37 seconds.
- **We again received the fewest complaints** (per 100k pay-monthly mobile subscribers, and of the major mobile providers) **about Tesco Mobile in 2019** (three per 100k subscribers for pay-monthly mobile services, compared to an average of 13), while **Virgin Mobile and Vodafone generated the most** (at 27 and 26 per 100k subscribers).
- In line with 2018, **nearly six in ten mobile customers who complained to their provider were satisfied with how the complaint was handled.**<sup>5</sup> In 2019 Vodafone and Virgin Mobile customers were less likely than average to be satisfied.

## Home broadband and phone<sup>6</sup>

### Summary: Home broadband

	Average broadband	BT	E E	KCOM	plusnet	POST OFFICE	sky	TalkTalk	Virgin	vodafone
Satisfaction with service overall	85%	86%	88%	N/A	93%	N/A	86%	78%	85%	N/A
Customers with a reason to complain	12%	10%	15%	N/A	14%	10%	12%	14%	14%	12%
Overall satisfaction with complaint handling	53%↑	↑57%	↑66%	N/A	49%	N/A	↑62%	44%	46%	N/A
Average call waiting time (mm:ss)	2:10 ↑	0:55	0:26	0:54	3:48	1:12	2:28	0:39	4:26	2:16
Ofcom complaints per 100,000 subscribers	52 ↓	50	22	N/A	100	37	21	87	60	115

↑↓ Significantly higher or lower than the previous year (2018) for all data sources with the exception of Customer Satisfaction tracker, for which the previous year was 2019.

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

**XX** Statistically significantly worse than the sector average at the 95% confidence level for market research results / bottom performer for MI data.

<sup>5</sup> Complaints -handling fieldwork was conducted between 4 December 2019 and 6 January 2020 and asked about complaints made in the past six months (between June 2019 and January 2020).

<sup>6</sup> For definitions and methodology, see relevant report section and annex; call waiting times are calculated for landline and broadband services together; Ofcom's market research includes UK communications providers with a market share of c.4% or more. Where providers are not included in the market research this is due to their not meeting the inclusion criteria. There are some exceptions: providers which do not meet this criterion have been reported on if base sizes allow.

## Summary: Landline

	Average landline	BT	EE	KCOM	plusnet	POST OFFICE	sky	TalkTalk	Virgin Media	vodafone
Satisfaction with service overall	85%	90%	82%	N/A	83%	N/A	88%	83%	77%	N/A
Customers with a reason to complain	4%	4%	5%	N/A	6%	8%	3%	3%↓	3%	4%
Overall satisfaction with complaint handling	54%	54%	59%	N/A	52%	N/A	↑60%	44%	49%	N/A
Average call waiting time (mm:ss) <sup>16</sup>	↑2:10	0:55	0:26	0:54	3:48	1:12	2:28	0:39	4:26	2:16
Ofcom complaints per 100,000 subscribers	↓38	31	17	N/A	78	34	18	69	49	65

↑↓ Significantly higher or lower than the previous year (2018) for all data sources with the exception of Customer Satisfaction tracker, for which the previous year was 2019.

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

**XX** Statistically significantly worse than the sector average at the 95% confidence level for market research results / bottom performers for MI data.

- **Overall satisfaction with landline and home broadband was unchanged** since the previous year (both at 85% this year). Overall **satisfaction with broadband was higher than average among Plusnet customers** and lower than average among TalkTalk customers. Overall **satisfaction with landline was higher among BT customers** and lower among Virgin Media customers, compared to the average.
- In 2019, the **average time customers had to wait in a call queue for landline and broadband providers was 2 minutes 10 seconds (up 33 seconds on 2018)**. **EE had the shortest average waiting time, at 26 seconds**, while Virgin Media had the longest, at 4 minutes 26 seconds.
- Among the major fixed telecoms providers, **the average number of landline and of broadband complaints to Ofcom per 100k customers fell** in 2019. **Sky had the fewest broadband complaints** (21 per 100k subscribers compared to an average of 52) and **EE had the fewest landline complaints** (17 per 100k compared to an average of 38). Vodafone had the most complaints for broadband (115 per 100k) and Plusnet had the most for landline (78 per 100k).
- Compared to 2018, home **broadband customers were more likely to be satisfied with how their complaint was handled**, up four percentage points to 53% in 2019, driven by improvements from BT, EE and Sky. **EE and Sky broadband customers were more likely than average to be satisfied with how their complaint was handled**, while TalkTalk and Virgin



Media customers were less likely than average to be satisfied. For landline services, Sky customers were more likely than average to be satisfied with how their complaint was handled and TalkTalk customers were less likely.

- In 2019, **87% of customers received a new landline or broadband order by the date agreed**, and on average<sup>7</sup> it took 11 days to get a new service installed (**down by four days since 2018**).
- For the first time we have data from providers about how they manage faults. Across all fixed-line providers, **about 46 faults were reported per 1,000 customers per month**. Where there was a total loss of service, **most providers took an average of two days to resolve faults**<sup>8</sup>, and the majority of providers were able to repair nine in ten **total loss of service faults within a week**.

## We are working to help improve service quality for telecoms customers

We have an ongoing programme of work to improve quality of service and to make sure customers can access high quality, reliable services. Our work means telecoms customers are benefiting from improvements in the delivery of new service installations and repairs or compensation if things go wrong. Since our last service quality report, we have:

- carried out a review of the first year of the voluntary automatic compensation scheme. This shows that the scheme is operating as intended with landline and broadband customers are getting more compensation when things go wrong and without having to ask for it;<sup>9</sup>
- evaluated our intervention with Openreach to improve its service standards. This evaluation shows that as a result of our intervention the service quality levels for on-time installations and repairs has improved for almost all services using Openreach;<sup>10</sup> and
- launched our ‘Fairness for Customers’ commitments, which major broadband, phone and pay-TV companies have signed up to.<sup>11</sup> These include a commitment for customers’ services to work as promised and to be reliable, and for providers to respond and fix problems promptly and to help their customers.

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<sup>7</sup> Using the median as a measure of the average as the mean is skewed by outliers

<sup>8</sup> Using the median as a measure of the average as the mean is skewed by outliers

<sup>9</sup> Ofcom, 2020. [Improving compensation for landline and broadband customer: Review of the automatic compensation scheme](#).

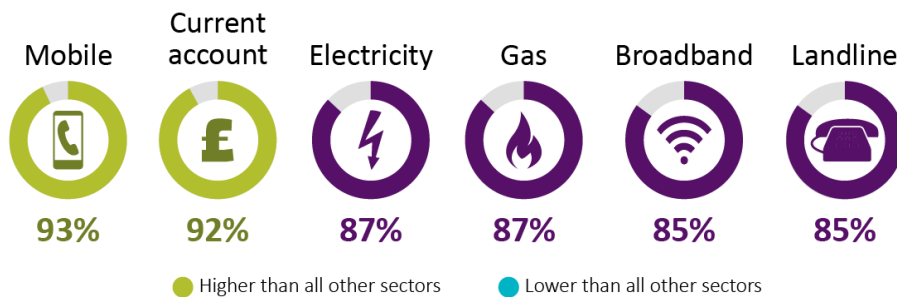
<sup>10</sup> Ofcom, May 2020. [Improving broadband and landline standards](#)

<sup>11</sup> <https://www.ofcom.org.uk/about-ofcom/latest/media/media-releases/2019/broadband-and-phone-firms-put-fairness-first>

## Comparison with other sectors

Mobile customers' satisfaction with their overall service was in line with that for bank current accounts and higher than for gas, electricity, landline and broadband. Broadband and landline customers' satisfaction with their overall service was in line with that for gas and electricity and below that for mobile and for bank current accounts.

**Figure 1: Overall satisfaction with services from communications providers, compared to current account and energy providers**



Source: [Ofcom Customer Satisfaction Tracker 2020](#) (see Note A in Annex 1 for more details)

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# Residential mobile services

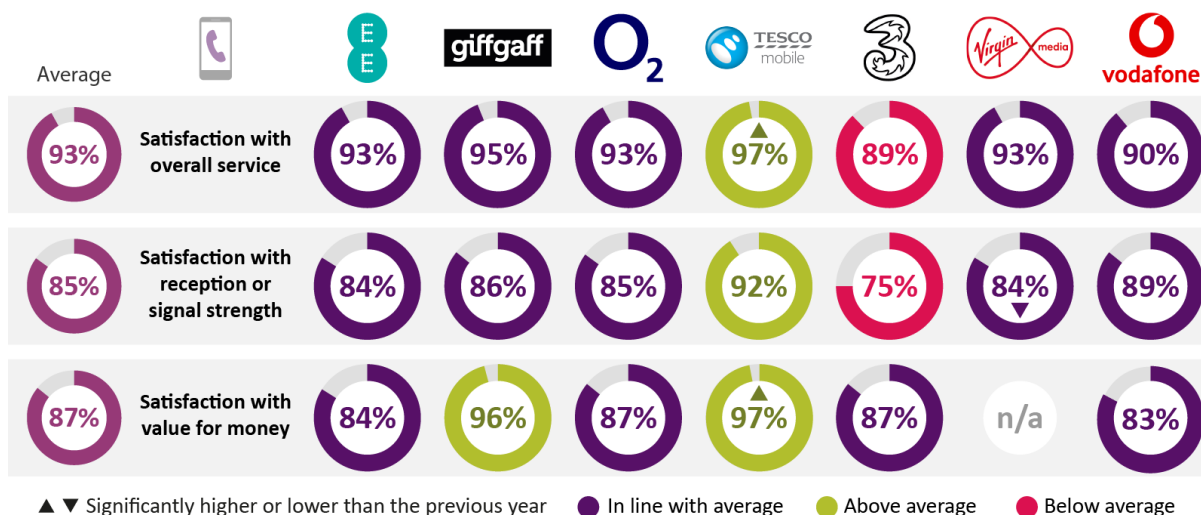
## Satisfaction

Overall satisfaction, and satisfaction with reception or signal strength,<sup>12</sup> were lower than average among Three customers and higher than average among Tesco Mobile customers, while satisfaction with value for money was higher than average among giffgaff and Tesco Mobile customers. Tesco Mobile customers were more satisfied with their overall service (97% compared with 90% the year before) and with value for money (97% compared with 92% the year before). Virgin Mobile customers were less satisfied

with their reception or signal strength than in the previous year.

Satisfaction with the overall service reception or signal strength, and value for money, were in line with the previous year. Where customers were dissatisfied,<sup>13</sup> the main cause was poor reception or coverage (70%), followed by the mobile service being too expensive or not good value for money (21%), also in line with the previous year.

Figure 2: Satisfaction with mobile service



Source: [Ofcom Customer Satisfaction Tracker 2020](#) (see Note B in Annex 1 for more details)

<sup>12</sup> Tesco Mobile and giffgaff use the O2 network and Virgin Mobile uses the EE network. Differences in satisfaction with network performance compared to these networks may be due to

different geographic distribution of customers or potentially a 'halo effect'.

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

EE and Three customers were less likely than average to recommend their provider to a friend,<sup>14</sup> while giffgaff and Tesco Mobile customers were more likely to do so.<sup>15</sup>

For Three customers this aligned with lower levels of overall satisfaction, and for Tesco Mobile customers, with higher levels of overall satisfaction, while both EE and giffgaff customers reported average levels of satisfaction. However, willingness to recommend may also have been linked to satisfaction with value for money, which was higher among both giffgaff (96%) and Tesco Mobile (97%) customers compared to the average (87%).

## Customer service

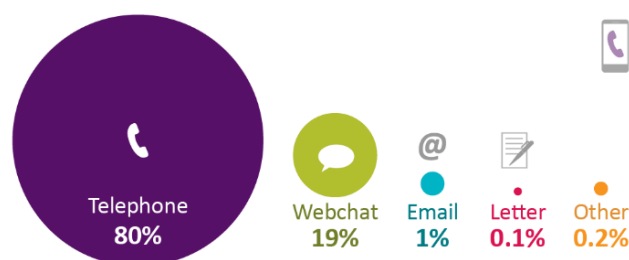
In 2019 all the major mobile providers offered phone calls, webchat, letter, email and online contact forms as ways in which their customers could contact them, as well as through social media. Overall, phone calls were the most popular method of customer contact<sup>16</sup> with major mobile providers, accounting for 80% of contacts during the year, followed by webchat at 19%.

Figure 3: Recommend to a friend: mobile providers

	2019	2020
More likely to recommend	giffgaff TESCO mobile	giffgaff TESCO mobile
Mobile average	EE, O2, 3, Vodafone, Virgin media	O2, Virgin media, Vodafone
Less likely to recommend		EE, 3

Source: Ofcom Customer Satisfaction Tracker 2019 and 2020 (see Note C in Annex 1 for more details)

Figure 4: Customer contacts with mobile providers, by channel: 2019



Source: Ofcom / provider data, 2019.<sup>17</sup>

Note: Due to changes in definitions this data is not directly comparable to last year as it includes incoming contacts from prospective customers.

<sup>14</sup> 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 [Ofcom Customer Satisfaction Tracker 2020]

<sup>15</sup> The average 'recommend to a friend' score in the mobile market was 25. The scores for individual providers were as follows: EE (17), giffgaff (52), O2 (30), Tesco Mobile (44), Three (10), Virgin Mobile (26) and Vodafone (27). Scores that were between 0 and 50 and are considered 'good' based on global NPSTM standards, while scores over 50 are considered 'excellent'.

<sup>16</sup> By 'customer contact' we mean a recorded instance when a residential customer or potential 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>17</sup> The figure shown for 'email' also includes customer contacts by online contact form.

In 2019, all the major mobile providers had a dedicated mobile application for their customers. These apps enabled customers to view their bills, payment plans, tariff or bundle changes and usage statistics (e.g. data use), and often offered a 'self-serve' option for answering queries. O2, Virgin Media and Vodafone allowed customers to contact them via in-app messaging.

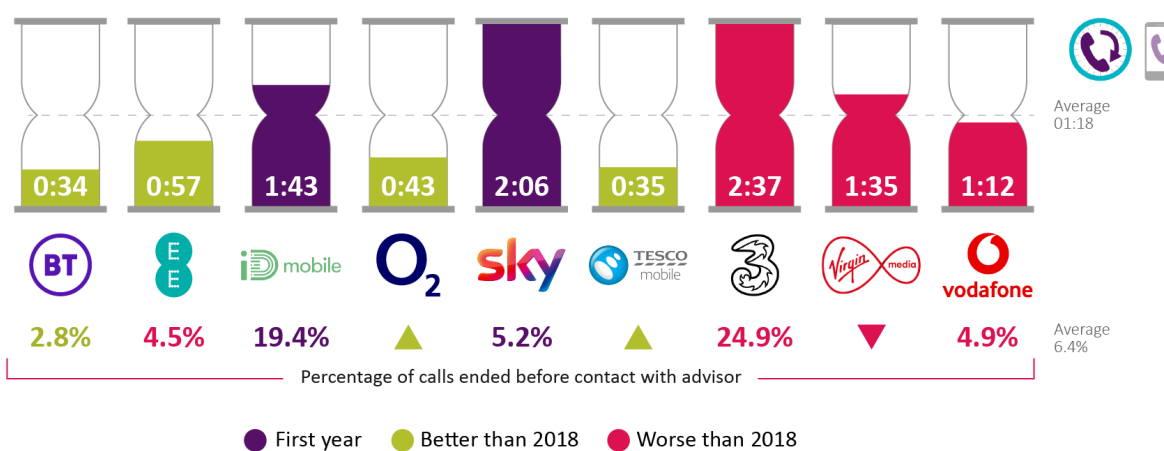
Mobile providers also reported responding to customer contacts via social media. Facebook and Twitter were the most frequently used platforms, while BT Mobile, EE, Tesco Mobile and O2 also responded to customers via Instagram.

## Call waiting time and abandonment rates

The average amount of time spent by mobile customers in a call queue was 1 minute 18 seconds in 2019 (up 25 seconds on 2018). Of the major mobile providers, the shortest average wait was for BT (34 seconds), while Three had the longest average waiting time (2 minutes 37 seconds).

Around 6.4% of calls to major mobile service providers ended while the customer was waiting in a queue. Of those who submitted comparable data,<sup>18</sup> BT had the lowest abandonment rate, while Three had the highest. Among those whose data were not comparable, both O2 and Tesco Mobile had improved since the previous year, while Virgin Mobile's abandonment rate had worsened.

Figure 5: Average call waiting times, by provider: 2019



Source: Ofcom / provider data, 2019.

Note: Some providers<sup>19</sup> were not able to provide comparable data. Abandonment average not comparable with 2018.<sup>20,21</sup>

<sup>18</sup> BT Mobile, EE, Three, Vodafone, Sky Mobile and iD Mobile.

<sup>19</sup> Lycamobile excluded as unable to provide comparable data. O2, Tesco Mobile and Virgin Mobile unable to provide comparable data about the percentage of calls that ended, so only information about their performance compared to the previous year has been included.

<sup>20</sup> Not comparable with 2018 due to reduced number of providers included in the calculation to ensure only comparable rates are used.

<sup>21</sup> Sky's call abandonment rate and the industry average call abandonment rate were adjusted in May 2021 from what was originally published.

## Reasons to complain and numbers of complaints

Three per cent of mobile customers said they had a reason to complain about their mobile service or supplier<sup>22</sup>, down one percentage point since 2018.

Customers of Three were more likely than average to have had a reason to complain in 2019, and this likelihood was up since 2018 (6% vs. 2%), although this may be because Three suffered a major network outage in October 2019. O2 customers were less likely than average to have a reason to complain in 2019, and less likely than in 2018.<sup>23</sup>

The most common reason to complain was that mobile services were not performing satisfactorily (61% of those who had reason to complain), either because of poor connection quality, loss of service, or text or voice mails delivered late. This was followed by billing, pricing or payment issues (24%). The proportion of mobile customers who had a reason to complain about a problem relating to installation and/ or set-up of their device fell from 5% in 2018 to 1% in 2019.

**Figure 6: 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**

	Average mobile	BT	E E	giffgaff	Lycamobile	O <sub>2</sub>	TESCO mobile	3	Virgin mobile	vodafone
Customers with a reason to complain in 2019	▼ 3%	3%	2%	2%	-	▼ 1%	3%	▲ 6%	3%	3%
Customers with a reason to complain in 2018	4%	-	2%	3%	3%	6%	3%	2%	3%	4%

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

X% Significantly lower than the market average at the 95% confidence level for market research results

X% Significantly higher than the market average at the 95% confidence level for market research results

Source: [Ofcom Comparing Service Quality research 2019: Reasons to complain \(see Note D in Annex 1 for more information\)](#)

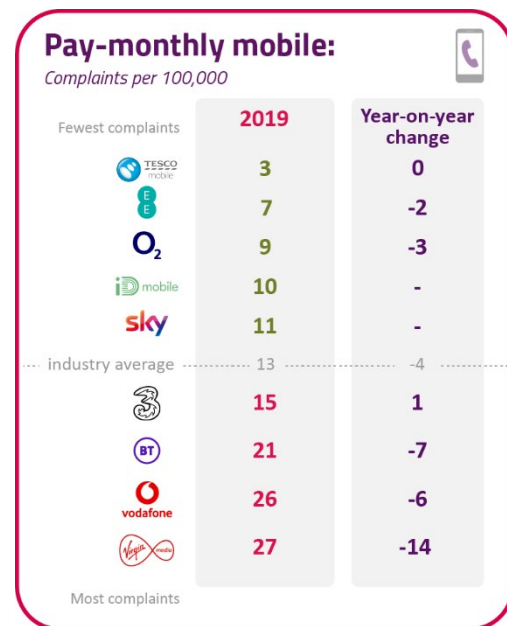
<sup>22</sup> Reasons to complain fieldwork conducted between 8 January 2020 and 28 January 2020 and asked about reasons to complain in the past 12 months (between January 2019 and January 2020).

<sup>23</sup> O2 suffered a network outage on 6 December 2018 which affected all operators using their network. This led to more O2 customers having a reason to complain than the industry average in 2018, and compared with 2017.

## Complaints to Ofcom

For the third consecutive year, Tesco Mobile generated the fewest complaints in 2019 (three per 100k subscribers for pay-monthly mobile services), while Virgin Mobile and Vodafone generated the most complaints per 100k subscribers (at 27 and 26 respectively). In 2019, the average number of complaints per 100k subscribers across all the major providers fell from 17 to 13 complaints per year.

Figure 7: Pay-monthly mobile complaints per 100k subscribers: 2019<sup>24</sup>



Source: Ofcom CCT data (Q1 2019 – Q4 2019)

Notes: All figures are rounded to the nearest whole number; the industry average relates only to the providers included in the analysis. The actual measurable difference between Virgin Media and Vodafone’s pay-monthly mobile complaints per 100k subscribers is less than one, so their results should be considered comparable.

<sup>24</sup> Ofcom reports on the number of complaints generated by the major mobile providers for pay-monthly services each quarter but does not report

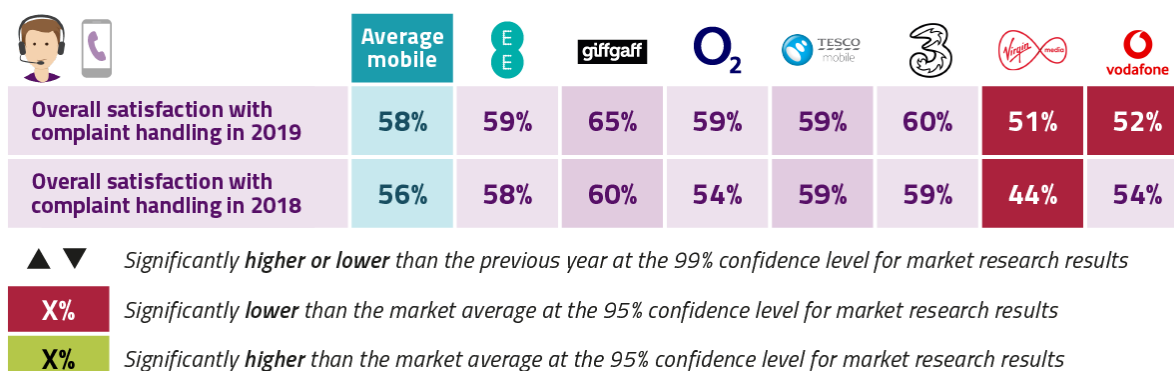
on pay-as-you-go mobile services, about which it receives low volumes of complaints in comparison with other services.

## Complaints handling

In 2019, Virgin Mobile and Vodafone customers were less likely than average to be satisfied with how their complaint was handled, as was the case for Virgin Mobile

customers in 2018.<sup>25</sup> Nearly six in ten mobile customers who made a complaint to their provider in 2019 were satisfied with how their complaint was handled, in line with 2018.

Figure 8: Overall satisfaction with mobile complaints handling

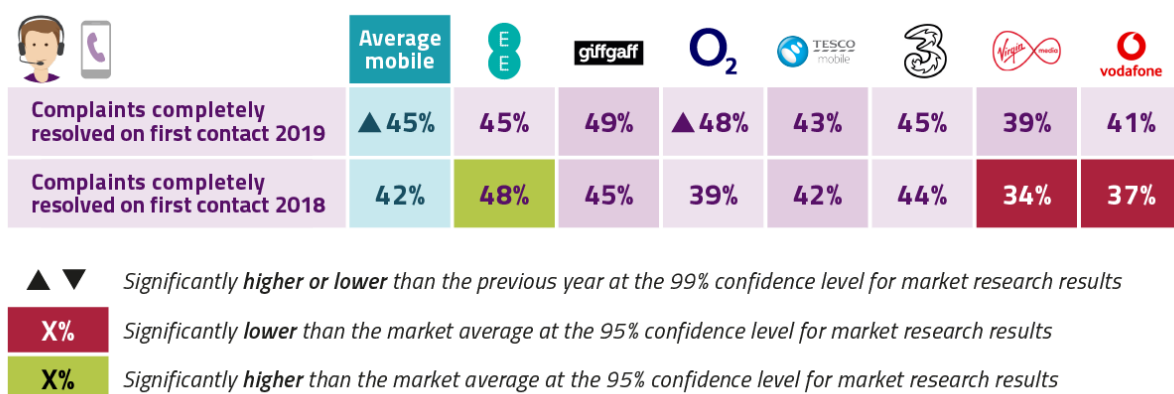


Source: Ofcom Customer complaints research: Quality of service [2018](#) and [2019](#) (see Note E in Annex 1 for more information)

The proportion of mobile complaints that were completely resolved on first contact with the provider increased in 2019, up three percentage points since 2018. The main driver

of this improvement was an increase in the proportion of complaints to O2 that were resolved on first contact (48%, up from 39% in 2018).

Figure 9: Proportion of mobile complaints resolved on first contact



Source: Ofcom Customer complaints research: Quality of service [2018](#) and [2019](#) (see Note F in Annex 1 for more information)

<sup>25</sup> In 2018 satisfaction with complaint handling among Vodafone customers was in line with the average.





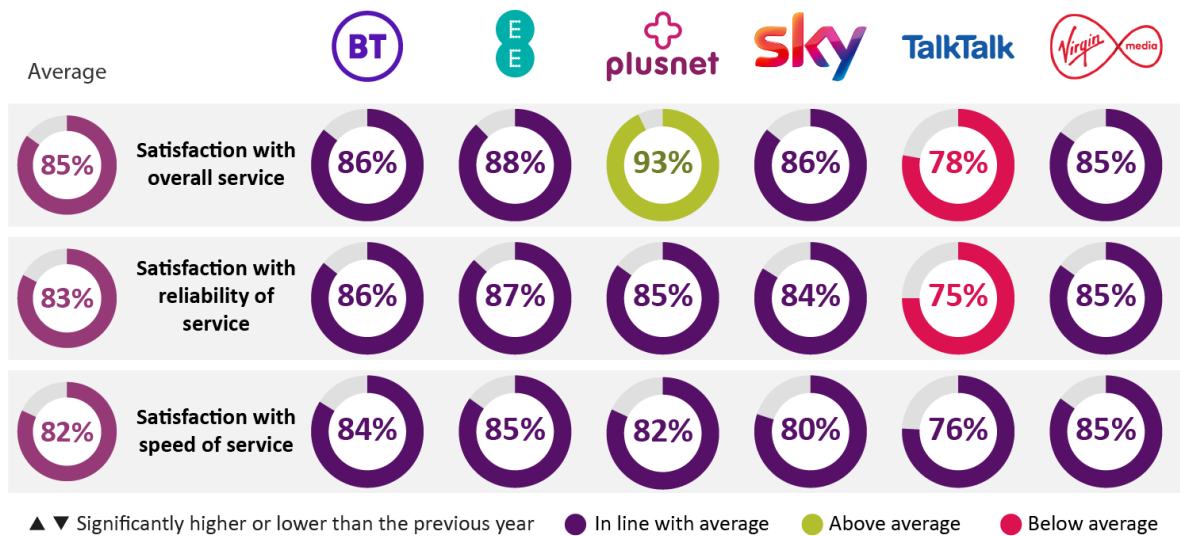
# Residential broadband and landline services

## Satisfaction

Overall satisfaction was higher among Plusnet broadband customers and lower among TalkTalk broadband customers, compared to the average. TalkTalk broadband customers were also less satisfied than average with the reliability of their service.

Where customers said they were dissatisfied<sup>26</sup> with their home broadband service, the top two reasons were slow speeds, or speed not as advertised (50%), and poor or unreliable connectivity (40%), in line with the previous year.

Figure 10: Satisfaction with home broadband service



Source: [Ofcom Customer Satisfaction Tracker 2020](#) (see Note G in Annex 1 for more information)

<sup>26</sup> 8% of customers said they were not satisfied with their broadband service overall

TalkTalk customers were less likely than average to recommend their broadband provider to a friend, which is consistent with the lower than average levels of satisfaction reported by TalkTalk broadband customers.<sup>27</sup>

**Figure 11: Recommend to a friend: broadband providers**

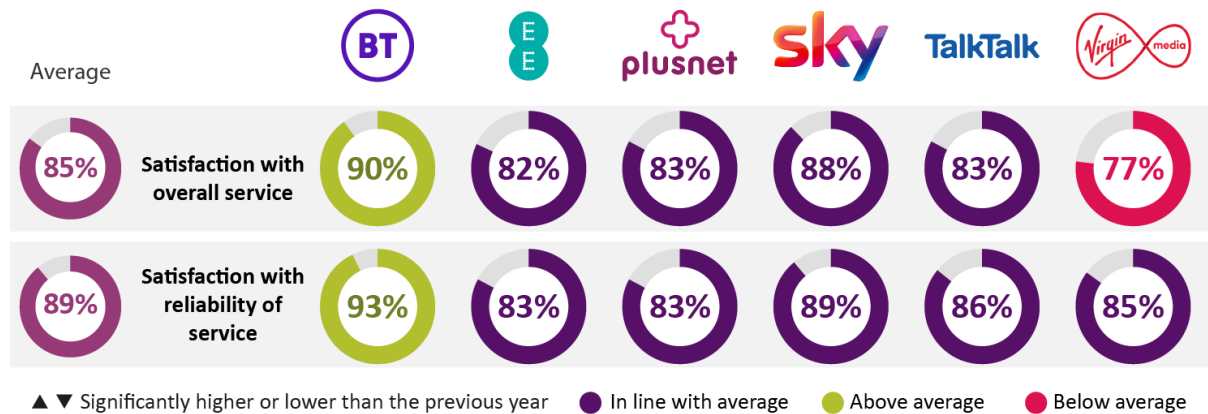
	2019	2020
<b>More likely to recommend</b>		
Broadband average		
<b>Less likely to recommend</b>	<b>TalkTalk</b>	<b>TalkTalk</b>

Overall satisfaction was higher among BT landline customers and lower among Virgin Media landline customers, compared to the average. BT customers were also more likely than average to be satisfied with the reliability of their landline service.

Overall satisfaction with landline services and satisfaction with the reliability of the service were in line with the previous year. Where customers said they were dissatisfied,<sup>28</sup> the top two reasons were ‘poor or unreliable connectivity’ (45%) and ‘the service is too expensive or not good value for money’ (26%), in line with the previous year.

Source: *Ofcom Customer Satisfaction Tracker 2020* (see Note H in Annex 1 for more information)

**Figure 12: Satisfaction with landline service**



Source: *Ofcom Customer Satisfaction Tracker 2020* (see Note I in Annex 1 for more information)



<sup>27</sup> The average ‘recommend to a friend’ score in the broadband market was 12. BT (12), EE (17), Plusnet (15), Sky (9) and Virgin Media (19) have ‘recommend to a friend’ scores that are between 0 and 50 and therefore considered ‘good’ based on

global NPS standards, while TalkTalk’s score was below 0 (-5).

<sup>28</sup> 3% of customers said they were not satisfied with their landline service overall.

All landline providers had ‘recommend to a friend’ scores that are considered ‘good’<sup>29</sup> (ranging from 5 to 27). Each landline provider had a score that was in line with the industry average, with none significantly higher or lower than the average.

Figure 13: Recommend to a friend: landline providers

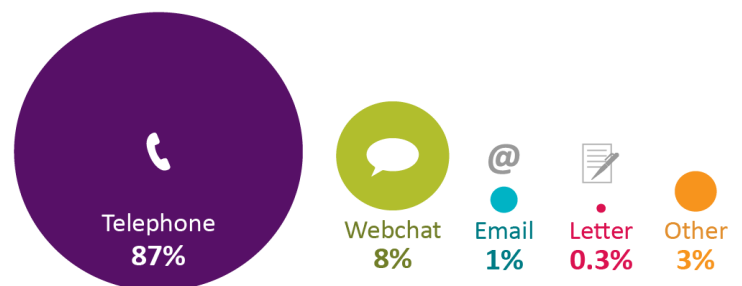
	2019	2020
More likely to recommend	-	-
Landline average		
Less likely to recommend	TalkTalk	

Source: Ofcom Customer Satisfaction Tracker 2020 (see Note J in Annex 1 for more information)

## Customer service

Phone calls were the most popular method of contact<sup>30</sup> across all of the major landline and broadband providers in 2019, accounting for an average of 87% of customer contacts, followed by webchat at 8%.

Figure 14: Customer contacts by channel, landline and home broadband provider: 2019



Source: Ofcom / provider data, 2019.<sup>31</sup>

Note: Due to changes in definitions this data is not directly comparable to last year as it includes incoming contacts from prospective customers

<sup>29</sup> The average ‘recommend to a friend’ score in the landline market was 12. All landline providers have scores that are between 0 and 50 and therefore considered ‘good’ based on global NPSTM standards; BT (19), EE (11), Plusnet (27), Sky (10), TalkTalk (9) and Virgin Media (5).

<sup>30</sup> By ‘customer contact’ we mean a recorded instance when a residential customer or potential 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>31</sup> The figure shown for ‘email’ also includes customer contacts by online contact form. ‘Other’ communication methods include text messaging and Facebook Messenger

As with the mobile providers, most of the major landline and broadband providers (except Plusnet and Post Office) offered their customers a dedicated mobile app in 2019, with a variety of functions. All the providers with mobile applications reported payments and bills as features of the app, and the ability to view usage statistics was a feature of most providers' apps. The apps provided by TalkTalk, Sky and Virgin Media allowed customers to arrange repairs and services such as rescheduling call-out appointments. TalkTalk, Virgin Media and Vodafone also allowed contact via in-app messaging.

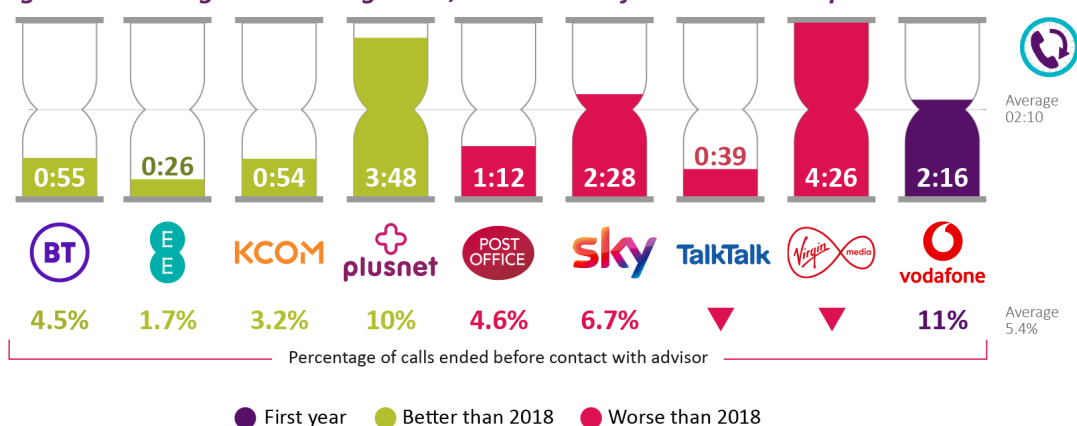
Most landline and broadband providers responded to customer contacts made over social media; Facebook and Twitter were the most frequently used platforms. More providers responded to customers via Instagram than last year, with BT, EE, KCOM and TalkTalk using this platform. Post Office was the only landline and broadband provider in our analysis which did not respond to customers via social media.

## Call waiting time and abandonment rates

The average time customers had to wait in a call queue for broadband and landline providers was 2 minutes 10 seconds (up by 33 seconds since 2018). EE had the shortest average waiting time, at 26 seconds, while Virgin Media had the longest, at 4 minutes 26 seconds. Generally, the shorter the call waiting time, the lower the proportion of abandoned calls.

In 2019 5.4% of calls to major landline and fixed broadband providers ended while the customer was waiting in a queue. Of the providers which submitted comparable data,<sup>32</sup> EE had the lowest rate of call abandonment (1.7%). Of those which did not submit comparable data, TalkTalk and Virgin Media's abandonment rate had worsened since the previous year.

Figure 15: Average call waiting times, landline and fixed broadband providers: 2019



Source: Ofcom / provider data, 2019. Note: Some providers<sup>33</sup> were not able to provide comparable data. Abandonment average not comparable with 2018.<sup>34,35</sup>

<sup>32</sup> BT, EE, KCOM, Plusnet, Post Office, Sky and Vodafone

<sup>33</sup> TalkTalk and Virgin Media were unable to provide comparable data about the percentage of calls that ended, so only information about their performance compared to the previous year has been included.

<sup>34</sup> Not comparable with 2018 due to reduced number of providers included in the calculation to ensure only comparable rates are used.

<sup>35</sup> Sky's call abandonment rate and the industry average call abandonment rate for 2019 were adjusted in May 2021 from what was originally published.

## Reasons to complain and numbers of complaints

**Twelve per cent of broadband customers had a reason to complain in 2019, in line with 2018.** Virgin Media customers were more likely than average to have a reason to complain about their broadband service in 2019.

The most common reason for customers to complain about their home broadband was service issues such as slow broadband speeds and intermittent or total loss of service (at 80%), followed by billing, pricing or payment issues (15%).

The proportion of customers with a reason to complain about a repair to their broadband service – for example if a repair did not take place on time or at all, or the repair didn't solve the problem – has increased (from 3% in 2018 to 6% in 2019). This was driven by an increase in the proportion of Virgin Media customers with a reason to complain about a repair to their broadband service in 2019 (10%, compared to 3% in 2018).

**Figure 16: 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<sup>36</sup>**

	Average broadband	BT	EE	plusnet	POST OFFICE	sky	TalkTalk	Virgin Media	vodafone
Customers with a reason to complain in 2019	12%	10%	15%	14%	10%	12%	14%	14%	12%
Customers with a reason to complain in 2018	13%	12%	11%	12%	-	10%	17%	15%	-

▲ ▼ Significantly higher or lower than the previous year at the 99% confidence level for market research results  
 X% Significantly lower than the market average at the 95% confidence level for market research results  
 X% Significantly higher than the market average at the 95% confidence level for market research results

Source: [Comparing Service Quality research 2019: Reasons to complain](#) (see Note K in Annex 1 for more information)

**The proportion of landline customers with a reason to complain was 4% in 2019.**

The most common reasons for customers to complain about their landline service related to service issues such as loss of service (55%),

followed by billing, pricing or payment issues (26%).

TalkTalk customers were less likely to have a reason to complain about their landline service in 2019 than in 2018.

<sup>36</sup> Virgin Media is marked as higher than average at 14% while TalkTalk, EE and Plusnet are not, because their results are not statistically significantly different from the average due to smaller base sizes.

Figure 17: 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

	Average landline	BT	EE	plusnet	POST OFFICE	sky	TalkTalk	Virgin	vodafone
Customers with a reason to complain in 2019	4%	4%	5%	6%	8%	3%	▼ 3%	3%	4%
Customers with a reason to complain in 2018	3%	4%	2%	2%	9%	2%	6%	3%	-

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

X% Significantly lower than the market average at the 95% confidence level for market research results

X% Significantly higher than the market average at the 95% confidence level for market research results

Source: [Ofcom Comparing Service Quality research 2019; Reason to complain \(see Note L in Annex 1 for more information\)](#)

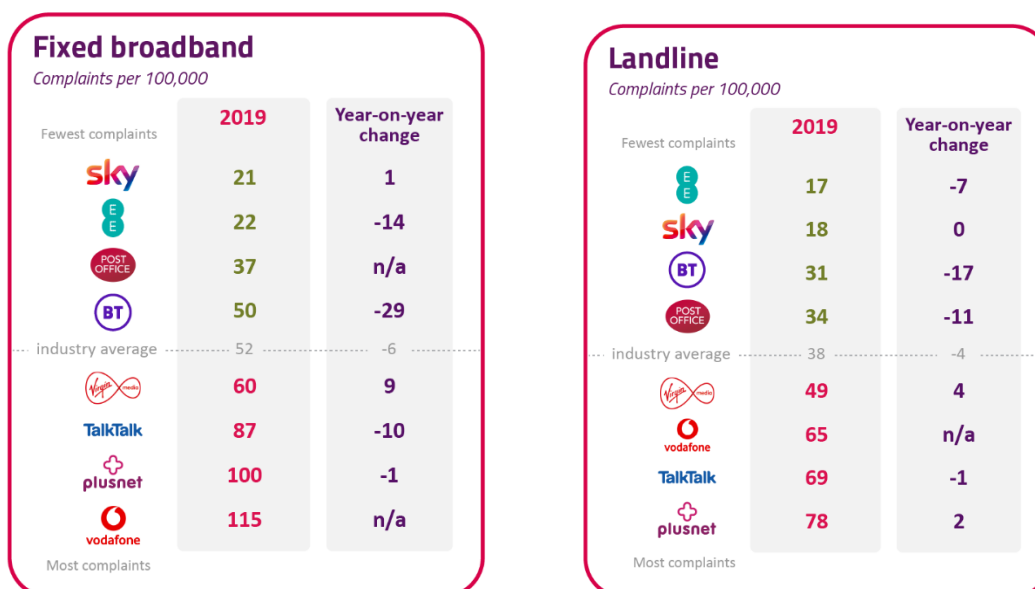
## Complaints to Ofcom

In 2019, Sky and EE generated the fewest broadband complaints to Ofcom per 100k subscribers per year (Sky generated the fewest for the third consecutive year), while for landline, EE generated the fewest complaints to Ofcom per 100k subscribers. Vodafone had the most home broadband

complaints per 100k subscribers, while Plusnet had the most landline complaints.

Among the major fixed telecoms providers, the average number of landline and of broadband complaints per 100k customers fell in 2019 (from 43 to 38 for landlines and 58 to 52 for broadband).

Figure 18: Fixed broadband and landline complaints per 100k subscribers: 2019



Source: Ofcom CCT data (Q1 2019 – Q4 2019).

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 Sky and EE's number of fixed broadband complaints per 100k customers was less than one, so their results should be considered comparable; Vodafone's market share was not above the threshold for inclusion throughout 2018.

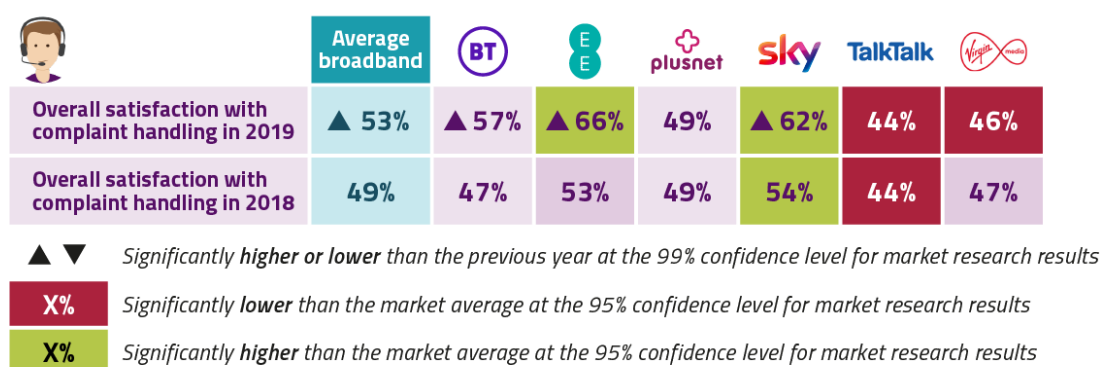


## Complaints handling

**Broadband customers were more likely than in 2018 to be satisfied with how their complaint was handled**, up from 49% to 53%. This can be attributed to increased levels of satisfaction with complaints handling among BT, EE and Sky customers, due to improvements in the way these companies dealt with complaints about service issues such as slow speeds or intermittent connection.<sup>37</sup>

In 2019, EE and Sky customers were more likely than average to be satisfied with the way their complaint was handled, while TalkTalk and Virgin Media customers were less likely to feel this way

**Figure 19: Overall satisfaction with broadband complaints handling**



Source: Ofcom Customer complaints research: Quality of service [2018](#) and [2019](#) (see Note M in Annex 1 for more information)

**Broadband complaints were more likely than in 2018 to be completely resolved<sup>38</sup> on first contact with their provider (37% compared to 32%);** a return to 2017 levels. The increase in the proportion of broadband complaints completely resolved on first contact in 2019 was attributable to improvements made by BT, EE and Sky.

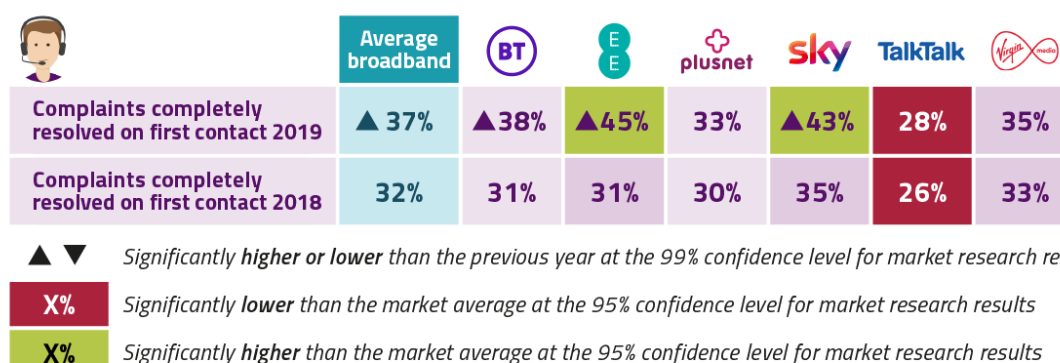
TalkTalk customers were less likely than average to say their complaint was completely resolved on first contact with their provider, while EE and Sky customers were more likely than average to say this.

<sup>37</sup> In the complaints-handling tracker, we ask about satisfaction with the handling of three broad types of complaint for each market (broadband, landline and mobile): billing and customer service issues (such as incorrect bill or dissatisfaction with customer service from a previous contact), service issues (such as slow speeds or intermittent

connection), and repairs and installation (such as time taken to repair or install a service).

<sup>38</sup> Interviewing was conducted between 4 December 2019 and 6 January 2020 and complaints would have been made between June 2019 and January 2020. The timing of the complaint (during the six-month period) and the resolution is not comparable across respondents.

**Figure 20: Proportion of broadband complaints resolved on first contact**

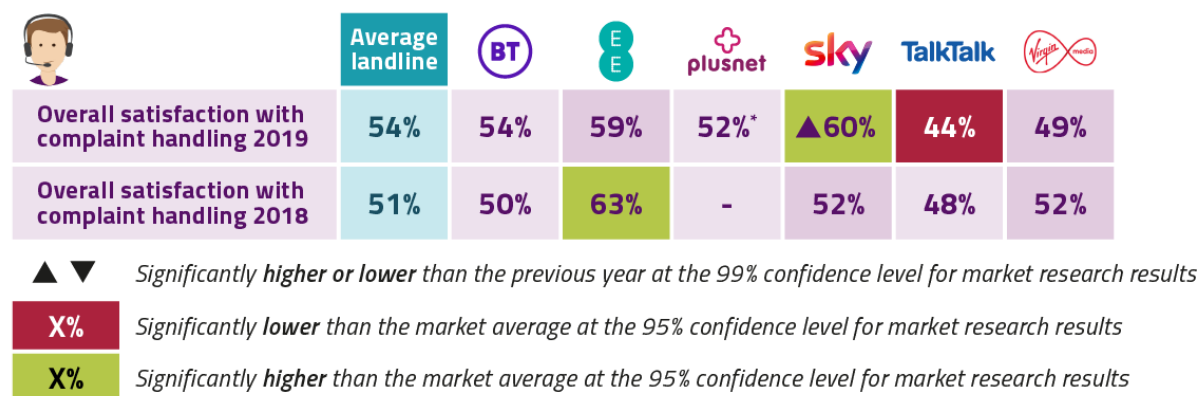


Source: Ofcom Customer complaints research: Quality of service 2018 and 2019 (see Note N in Annex 1 for more information)

**Sky landline customers were more likely than average to be satisfied with how their complaint was handled**, while TalkTalk landline customers were less likely than average to feel this way. Overall satisfaction with landline complaint handling was in line with 2018.

Sky customers' satisfaction with how their landline complaints were handled had increased since 2018.

**Figure 21: Overall satisfaction with landline complaints handling**




Source: Ofcom Customer complaints research: Quality of service 2018 and 2019 (see Note O in Annex 1 for more information) \* = Low base size (under 100)

TalkTalk and Plusnet landline customers were less likely than average to say their complaint had been completely resolved on first contact, while Sky landline customers were more likely to say this.

Just over four in ten landline customers who made a complaint to their provider said their complaint had been completely resolved on first contact, in line with 2018.

Figure 22: Proportion of landline complaints resolved on first contact

	Average landline	BT	E E	plusnet	sky	TalkTalk	Virgin media
Complaints completely resolved on first contact 2019	41%	42%	45%	29%*	47%	33%	38%
Complaints completely resolved on first contact 2018	39%	41%	39%	n/a	41%	31%	36%

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

X% Significantly lower than the market average at the 95% confidence level for market research results

X% Significantly higher than the market average at the 95% confidence level for market research results

Source: Ofcom Customer complaints research: Quality of service [2018](#) and [2019](#) (see Note P in Annex 1 for more information)

\* = Low base size (under 100)



# Fixed line: new services and repairs

## Getting a new service<sup>39</sup>

Overall, providers reported that **87% of all landline and broadband orders were delivered by the date agreed** with the customer in 2019.<sup>40</sup> When a customer was moving home and staying with the same provider, 86% of these types of orders were delivered by the agreed date.

On average, it took **11 days to complete a new landline or broadband order** (either a new service, home move or a change to service), four days faster than last year. On average, it took a day longer to deliver a new service in rural areas than in urban areas.

Figure 23: Average time to deliver a service, from order to delivery (days)



Source: Ofcom / provider data, 2019.

The type of new service ordered can affect the time taken to deliver the service. The changes can be categorised as:

- obtaining a service from a new provider;
- moving to a new house and staying with the same provider; and
- changing the service provided by an existing supplier (such as moving to a higher-speed broadband service).

**Changing the service received from an existing supplier is the quickest** of these processes. **Home moves typically take the longest.** However, there was significant variation between providers. **Virgin Media was the quickest across all three types**, while Post Office was slower than average. Plusnet was the slowest at delivering a new service when customers move house.

<sup>39</sup> For further details on the providers included and the methodology used see Annex 3.

<sup>40</sup> This data is not directly comparable with last year as it does not include all rearranged appointments

The average time to change provider is 14 days. It is unlikely to fall significantly below 14 days as Ofcom rules specify a minimum transfer period for most switches between

providers that use the Openreach and KCOM networks.<sup>41</sup> Most providers take a similar amount of time to complete a switch.

Figure 24: Average time to change a service, home move and switch provider (days)

	Average	BT	E E	KCOM	plusnet	POST OFFICE	sky	TalkTalk	Virgin
Change of service (same provider)	8	9	8	13	8	15	10	13	2
Home move (same provider)	15	16	16	15	19	18	15	15	12
Switch to new provider	14	14	16	17	17	17	14	15	12

Source: Ofcom / provider data, 2019

Landline and broadband providers completed a large majority of orders within four weeks. A small minority of orders took more than four weeks to be delivered. In 2019, **4% of orders (about 300,000 in total) took more than four weeks to be delivered**, while less than 1% of new installations took more than eight weeks to be completed. Providers reported that when installations took longer than four weeks, this was often because of street works (road opening issues, permission to dig) or issues with building the network to the customer’s home (problems with access to land and property, such as getting landlord permission).

**On average, full-fibre services were delivered in a similar timeframe as other broadband services.** Full-fibre is still a relatively new deployment technology and has a more complex installation process and a relatively

low install base compared to other technologies.

Figure 25: Average time to deliver a service, by technology (days)

Technology	Average delivery days
ADSL	15
FTTC	12
Cable (DOCSIS)	7
Cable (DOCSIS over Fibre)	13
FOTP	13
Landline PSTN	17
Landline VoIP	25

Source: Ofcom / provider data, 2019

<sup>41</sup> Switches between providers using the Openreach or KCOM copper (including FTTC) networks take at least ten working days. This gives time for customers to ‘stop the switch’ if they have not agreed to it or have changed their mind (e.g. if they are told they need to pay an early termination charge). The rules for switching,

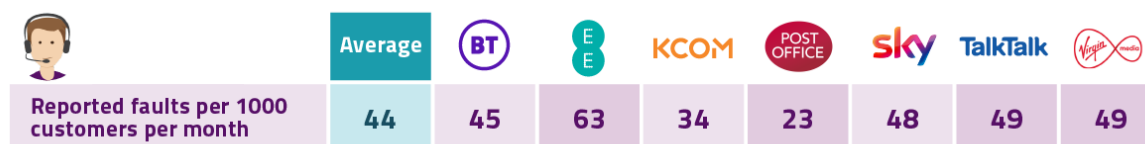
including between networks (e.g. from Openreach to Virgin Media) and to/from full-fibre, are currently under review.

<https://www.ofcom.org.uk/consultations-and-statements/category-1/proposals-to-implement-new-eecc>

## Number of Faults

Across the industry, providers received about **44 reported faults<sup>42</sup> per 1,000 fixed line broadband and landline customers per month** during the relevant reporting period.<sup>43</sup>

*Figure 26: Reported faults per 1000 customers per month, by provider*



Source: Ofcom / provider data, July-Dec 2019

Note: EE, Post Office and KCOM data are based on Sept to December.<sup>44</sup>

Not all faults are the result of a failure or degradation of the provider's network or service. Sometimes the cause of the fault is in the customer's own home (or an area for which they are responsible), such as problems with in-home wiring or misconnections between devices. On average, **just under half of fixed-line faults reported to providers were identified to be within the customer domain** (Figure 27). The others were the result of a failure of the provider's network or service, or where a specific cause could not be conclusively established.

Broadband faults were split equally between those that were found to be the customer's responsibility and those that were the provider's responsibility. However, **of the faults that related to voice, or voice and broadband services, fewer were considered to be in the customer's domain**. This may be because physical network faults on a landline (e.g. damage) are more likely to affect the

voice service (if no broadband is taken) or both voice and broadband services, rather than solely the broadband service. It is also the case that in-home issues related to devices or signal interference are more likely to affect broadband performance than landline performance.

*Figure 27: Proportion of identified causes of reported faults, by responsibility*

Service	Customer domain	Not customer domain
Broadband faults	50%	50%
'Voice' or 'voice and broadband' faults	40%	60%
All faults	49%	51%

Source: Ofcom / provider data, 2019

<sup>42</sup> A fault can be anything that a customer reports to a provider regarding the degradation or even complete failure of the service. See Annex 3 for more details.

<sup>43</sup> Most providers submitted data for July to December 2019. EE and KCOM's data cover September to December. Methodology Annex 3 describes the reporting periods in more detail.

<sup>44</sup> Faults per 1,000 customer per month figures for BT, Virgin Media and the industry average were adjusted in May 2021 from what was originally published.



## Fault repair times

There was little variation in the time taken to fix faults where there was a total loss of service (TLOS). Almost all of the providers included in our analysis took an average of two days or less to resolve these faults.<sup>45</sup>

Three-quarters of total loss of service (TLOS) faults were not considered to be the customer’s responsibility.

Figure 28: Average (median)<sup>46</sup> time taken to repair/resolve TLOS faults



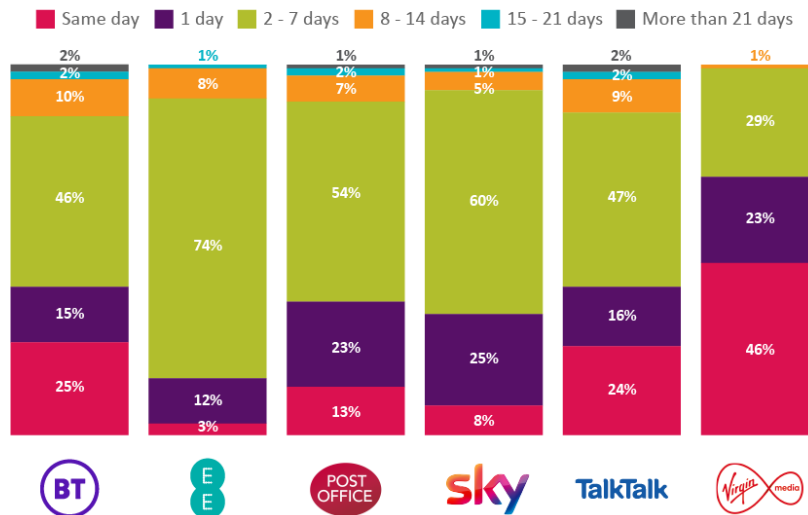
Source: Ofcom / provider data, 2019.

\*KCOM data only relates to TLOS faults that required an engineer visit.

Most providers were able to fix nine out of ten faults within a week. Long resolution/repair times might be because the operator needs access to a building or permission to dig up the street to repair cables. The time taken to fix a fault can depend on whether an

engineer needs to be dispatched to investigate, either to the customer’s property or to somewhere else in the provider’s network (such as a street cabinet). **Fault resolution typically took almost two days longer when an engineer was required.**

Figure 29: Distribution of repair times, by provider



Source: Ofcom / provider data, 2019

Note: KCOM is excluded from this analysis as its data only relates to TLOS faults that required an engineer visit.

<sup>45</sup> To ensure consistency and comparability between providers, we used a stricter definition of a fault: a total loss of service (TLOS). This excluded issues such as intermittent faults or where broadband speeds have degraded, to avoid subjective judgements by the providers when

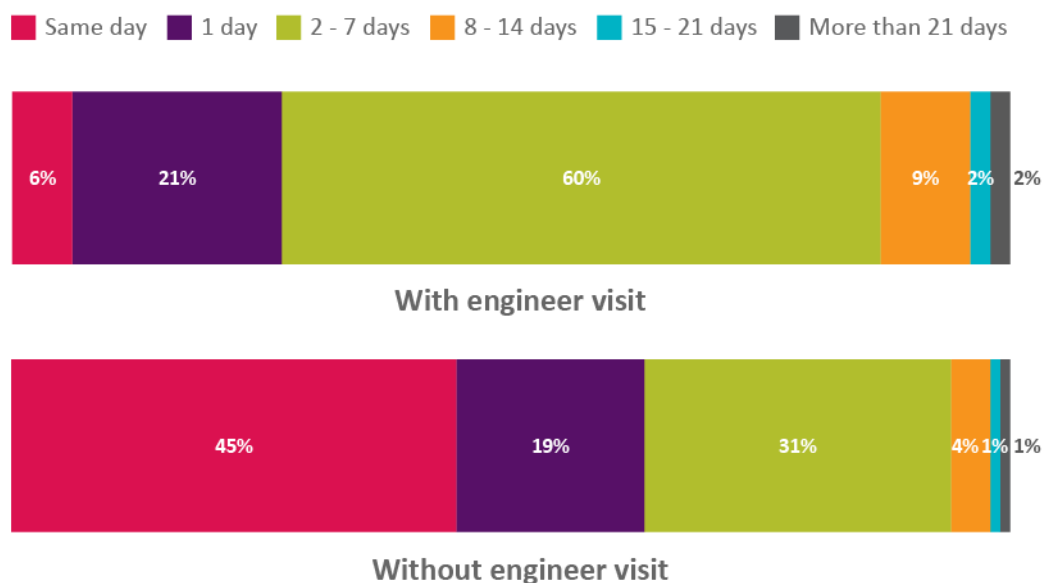
reporting fault repairs. Further information on the data gathered and the definitions used can be found in the Methodology Annex 3.

<sup>46</sup> The median repair time is the value (duration) at the midpoint: Half of the repair times will be lower than this value; the other half longer.

Of the Virgin Media faults that were fixed on the same day, around two-thirds were due to broadband outages where multiple customers reported faults in the same locality. This may be due to the way in which broadband services are delivered over Virgin Media’s predominantly cable broadband network. A single fault in the local access system can

result in multiple customer fault reports, but may be quickly resolved remotely without the need to send an engineer. This might explain the slightly higher reported fault rate (Figure 26), yet faster resolution times (Figures 28 and 29) and lower re-contact rates (Figure 31 below) for Virgin Media customers.

**Figure 30: Distribution of repair times with / without engineer visit**



Figures may not add up to exactly 100% due to rounding.

Source: Ofcom / provider data, 2019

Note: Excludes KCOM.

The time taken to fix a fault can also depend on the type of service that has stopped working. **Voice and voice and broadband faults took a day longer to fix than broadband-only faults** and, as noted above, they were more often found to be caused by issues in the provider’s domain.

The majority of faults were fixed at the first attempt. On average, **customers had to re-contact their provider regarding around one in ten faults**, with notable variations between providers.<sup>47</sup>

<sup>47</sup> The data captured whether the customer re-contacted the provider regarding the same fault

within 48 hours of the first recording of completion.

Figure 31: Proportion of re-contacts within 48 hours, by operator



Source: Ofcom / provider data, 2019

\* KCOM is excluded from this analysis as its data only relates to TLOS faults that required an engineer visit; TalkTalk did not provide any re-contact data.

## Missed appointments

**Time slots for installations offered by providers were broadly consistent in 2019, as many providers used Openreach’s standard Monday to Friday 8am-1pm or 1pm-6pm time slots.** Virgin Media offered the same slots using its own engineers. KCOM also used its own engineers and offered two- and four-hour slots, while BT additionally offered premium slots (7am to 8am and 6pm to 8pm).

**Providers all offered shorter timeslots for fault repairs in some circumstances.** In addition to using Openreach’s standard time slots, most operators also used third-party Qube or Enjoy engineers who offered two- to

three-hour slots to customers, either Monday to Friday or Monday to Saturday. TalkTalk also offered two- to three-hour time slots, while KCOM and Virgin Media offered three- to four-hour time slots using their own engineers. While most providers offered engineer visits between 7am and 8pm, EE, Virgin Media, and KCOM engineers were available for fewer hours of the day.

The proportion of missed appointments by Openreach engineers has fallen significantly since reporting started in 2016, for both installations and repairs.<sup>48</sup>

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

Openreach network	2016	2017	2018	2019
Installation	3.6%	1.9%	1.9%	1.4%
Repair	2.8%	1.8%	1.8%	1.5%

Source: Ofcom analysis of provider data, 2019.

Notes: 2018 and 2019 data were derived from information provided by Openreach whereas data for previous years were collected only from operators. As a result, data are not directly comparable between these years.

<sup>48</sup> Next year we will also report on missed appointments by non-Openreach engineers.

In 2019, Virgin Media missed 0.7% of all engineer appointments for installations, up from 0.1% in 2018. The proportion of engineer-missed repair appointments increased from 0.4% in 2018 to 1.7% in 2019.<sup>49</sup> KCOM missed 0.1% of installation appointments and 3.5% of repairs in 2019.

**Figure 33: Proportion of missed appointments by Virgin Media, by appointment type: 2016-2019**




Virgin Media network	2016	2017	2018	2019
Installation	0.6%	0.4%	0.1%	0.7%
Repair	0.2%	0.3%	0.4%	1.7%

Source: Ofcom analysis of provider data, 2019.

## Automatic compensation scheme

**The automatic compensation scheme has generated more compensation for landline and broadband customers when things go wrong.** Launched in April 2019, the automatic compensation scheme for residential broadband and landline customers was designed to ensure that customers receive

appropriate redress when they experience problems with their service. The scheme requires that signatories pay compensation, without the customer having to ask for it, for delayed repairs following a loss of service, missed repair or provision appointments, and delays to the start of a new service.<sup>50</sup>

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.	 <b>£8</b> 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.	 <b>£25</b> 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.	 <b>£5</b> for each calendar day of delay, including the missed start date

Five providers – BT, Sky, TalkTalk, Virgin Media and Zen Internet – signed up to the scheme when it launched. Together **they paid over £20.7m in automatic compensation**

**between July and December 2019.**<sup>51</sup> This is notably higher than the compensation all providers were paying out before the scheme was introduced. We estimated landline and

<sup>49</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 classes an appointment as missed if it does not take place on the scheduled day.

<sup>50</sup> Paragraph 40 of the [automatic compensation scheme](#) specifies the exceptional circumstances in which signatories are not obligated to pay automatic compensation. Ofcom analysis of data provided by BT, Sky, TalkTalk and Virgin Media suggests that in 2019 the most commonly cited exception was that the customer is at fault for the service failure or prevents the service issue from being resolved.

<sup>51</sup> BT, Sky, TalkTalk, Virgin Media and Zen Internet response to formal information request dated 6 June 2020.

broadband customers were receiving £8m in compensation over an equivalent six-month period for loss of service incidents, missed appointments, and delayed provisions.<sup>52</sup> In addition, we note that this increase in compensation is despite significant improvements in Openreach quality of service

(particularly on delayed repairs) over the last few years.<sup>53</sup>

Figure 34 shows how much compensation was paid for each service issue between July and December 2019. These figures do not include any compensation that was paid over and above what is required under the scheme.

**Figure 34: Amount of automatic compensation paid**

Service issue	Amount of automatic compensation paid July-December 2019
Delayed repair following loss of service	<b>£9.7m</b>
Missed appointments	<b>£1.6m</b>
Delayed provision of a new service	<b>£9.5m</b>

Source: Ofcom analysis of provider data, 2019

**Almost 600,000 automatic compensation payments were made in July to December 2019.**<sup>54</sup> Figure 35 shows that in 2019 there were more almost 600,000 incidents of either loss of service, delayed provision or missed appointments for which a customer received

automatic compensation without having to ask for it. This is higher than the estimated number of compensation payments paid for an equivalent six-month period before the scheme was introduced.<sup>55</sup>

<sup>52</sup> £5.9m for loss of service incidents; £1.9m for delayed provisions; and £0.4m for missed appointments. Ofcom, March 2017. [Automatic Compensation: Protecting consumers from quality of service problems](#), page 77, converted from annual to six-month averages. Figures represent averages across the period Q3 2014 to Q2 2016. Loss of service payments include compensation paid for a loss of service that was repaired within two working days.

<sup>53</sup> For further details on improvements in Openreach service quality see Ofcom, 2020, [Improving broadband and landline standards: A review of how Ofcom’s service quality rules have affected Openreach’s service level performance](#).

<sup>54</sup> BT, Sky, TalkTalk, Virgin Media and Zen Internet response to formal information request dated 6 June 2020.

<sup>55</sup> 440,000 payments for loss of service incidents; 20,000 payments for missed appointments; and 80,000 payments for delayed provisions. Ofcom, March 2017. [Automatic Compensation: Protecting consumers from quality of service problems](#), page 77, converted from annual to six-month averages. Figures represent averages across the period Q3 2014 to Q2 2016. Loss of service payments includes compensation paid for a loss of service that was repaired within two working days.

**Figure 35: Number of automatic compensation payments made**

<b>Service issue</b>	<b>Volume of automatic compensation payments July – December 2019</b>
Delayed repair following loss of service	<b>309,000</b>
Missed appointments	<b>59,000</b>
Delayed provision of a new service	<b>228,000</b>

*Source: Ofcom analysis of provider data, 2019. All figures are rounded to the nearest 1,000.*

Ofcom analysis of the data provided found that the amount of compensation signatories paid in these instances is in line with the values signatories are required to pay out

under the scheme. Further details of our assessment of the scheme can be found in our review of the automatic compensation scheme, published alongside this report.<sup>56</sup>

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<sup>56</sup> Ofcom, 2020. [Improving compensation for landline and broadband customer: Review of the automatic compensation scheme.](#)

# Annex 1: Consumer research source details

## Note A

**L1/M2/IN2/PT1/B1/BM3/BM8/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(2225), their mobile phone service (3064), their fixed broadband service (2362), their pay TV service (1524), their services taken with the same supplier (2225), their main current account provider (2992), their gas provider (2225), their electricity provider (2697). 'Don't know' responses have been excluded from the base.*

## Note B

**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 (3064), receiving their service from EE (741), giffgaff (126), O<sub>2</sub> (602), Tesco Mobile (257), Three (331), Virgin Mobile (164), Vodafone (436), on a contract (2403), on prepay (652). 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 (2554), receiving their service from EE (647), giffgaff (122), O<sub>2</sub> (593), Tesco Mobile (253), Three (321), Vodafone (398).*

*NB. Base size for Virgin Mobile for question M3 too low to report on.*

**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 (3065), receiving their service from EE (742), giffgaff (126), O<sub>2</sub> (604), Tesco Mobile (256), Three (331), Virgin Mobile (163), Vodafone (436), on a contract (2403), on prepay (653). 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 C

**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:

**2019 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), Three (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.

**2020 Base:** All adults aged 16+ who are the decision maker and express an opinion on their mobile phone service (3068), receiving their service from EE (742), giffgaff (126), O<sub>2</sub> (604), Tesco Mobile (257), Three (331), Virgin Mobile (164), Vodafone (436), on a contract (2404), on prepay (654). Providers used by fewer than 100 respondents are not shown individually but are included in the total.

## Note D

**Q.5** 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 (5623), BT (261), EE (1256), giffgaff (285), O<sub>2</sub> (1121), Tesco Mobile (457), Three (582), Virgin Mobile (364) and Vodafone (922).

## Note E

**Q9.** Overall, how satisfied are you with the service you received from [Provider] customer services with regard to the complaint that you had?

**Base for 2019:** All who complained about the mobile service in past six months (2951), EE (647), giffgaff (207), O<sub>2</sub> (604), Tesco Mobile (304), Three (454), Virgin Media (200), Vodafone (535).

**Base for 2018:** All who complained about the mobile service in past six months (3027), EE (645), giffgaff (219), O<sub>2</sub> (677), Tesco Mobile (306), Three (450), Virgin Media (198), Vodafone (532).

## Note F

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

**Base: for 2019:** All who complained about mobile service in past six months (2951), EE (647), giffgaff (207), O2 (604), Tesco Mobile (304), Three (454), Virgin Media (200), Vodafone (535).

**Base: for 2018:** All who complained about mobile service in past six months (3027), EE (645), giffgaff (219), O2 (677), Tesco Mobile (306), Three (450), Virgin Media (198), Vodafone (532).

## Note G

**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...

**IN2 Base:** All adults aged 16+ who are the decision maker and express an opinion on their fixed broadband internet service (2362), receiving their service from BT (520), EE (133), Plusnet (134), Sky (611), TalkTalk (282), Virgin Media (467). 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.

**IN4 Base:** All adults aged 16+ who are the decision maker and express an opinion on their fixed broadband internet service (2354), receiving their service from BT (517), EE (132), Plusnet (135), Sky (610), TalkTalk (281), Virgin Media (466). 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.

**IN5 Base:** All adults aged 16+ who are the decision maker and express an opinion on their fixed broadband internet service (2363), receiving their service from BT (519), EE (133), Plusnet (134), Sky (613), TalkTalk (283), Virgin Media (467). 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 H

**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'?

**2020 Base:** All adults aged 16+ who are the decision maker and express an opinion on their fixed broadband internet service (2369), receiving their service from BT (521), EE (133), Plusnet (135), Sky (614), TalkTalk (283), Virgin Media (467). Providers used by fewer than 100 respondents are not shown individually but are included in the total.

**2019 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). Providers used by fewer than 100 respondents are not shown individually but are included in the total.

## Note I

**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:

**For L1:** All adults aged 16+ who are the decision maker and express an opinion on their landline service (2225), receiving their service from BT (705), EE (117), Plusnet (115), Sky (516), TalkTalk (250), Virgin Media (363). 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.

**For L3:** All adults aged 16+ who are the decision maker and express an opinion on their landline service (2206), receiving their service from BT (709), EE (114), Plusnet (112), Sky (514), TalkTalk (250), Virgin Media (352). 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 J

**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:

**2020:** All adults aged 16+ who are the decision maker and express an opinion on their landline service (2297), receiving their service from BT (719), EE (120), Plusnet (120), Sky (540), TalkTalk (225), Virgin Media (378). Providers used by fewer than 100 respondents are not shown individually but are included in the total.

**2019:** 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 K

**Q.5** 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 (4982), BT (1302), EE (268), Plusnet (196), Post Office (50), Sky (1204), TalkTalk (561), Virgin Media (1234) and Vodafone (149).*

## Note L

**Q.5** 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 (4644), BT (1839), EE (174), Plusnet (147), Post Office (67), Sky (925), TalkTalk (473), Virgin Media (871) and Vodafone (110).*

## Note M

**Q9:** Overall, how satisfied are you with the service you received from [Provider] customer services with regard to the complaint that you had?

**Base for 2019:** All who have complained about Broadband service in the last six months (2897), BT (632), EE (204), Sky (611), TalkTalk (539), Virgin Media (697), Plusnet (214).

**Base for 2018:** 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

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

**Base for 2019:** All who have complained about Broadband service in the last six months (2897), BT (632), EE (204), Sky (611), TalkTalk (539), Virgin Media (697), Plusnet (214).

**Base for 2018:** 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 O

**Q9:** Overall, how satisfied are you with the service you received from [Provider] customer services with regard to the complaint that you had?

**Base for 2019:** All who have complained about Landline service in the last six months (2039), BT (543), EE (157), Plusnet (89), Sky (493), TalkTalk (326), Virgin Media (431).

**Base for 2018:** All who have complained about Landline service in the last six months (1933), BT (566), EE (162), Sky (437), TalkTalk (340), Virgin Media (428).

## Note P

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

**Base for 2019:** All who have complained about Landline service in the last six months (2039), BT (543), EE (157), Plusnet (89), Sky (493), TalkTalk (326), Virgin Media (431).

**Base for 2018:** All who have complained about Landline service in the last six months (1933), BT (566), EE (162), Sky (437), TalkTalk (340), Virgin Media (428).