



# Comparing Service Quality: a summary

## People need communications services they can rely on

Phone and internet services are central to our home and work lives. They keep us entertained, help us stay in touch with friends and family and make day-to-day tasks easier. But when they go wrong it can be inconvenient, disruptive and expensive.

This means it's vital that communications providers deliver reliable services and proper support when things aren't working. Drawing on information from consumers and industry, this report looks at how well the larger providers did in 2016.

## Most customers are satisfied with their services overall

When asked, most internet and phone users say they are satisfied with their service. Mobile customers are more satisfied than broadband and landline customers.

## But many still experience poor service, especially with their broadband

More than one in ten broadband users had a reason to complain about their service in 2016. The most common reason was the service not performing as expected, e.g. because of a slow or patchy connection. Around one in twenty mobile customers had cause for complaint, and the most common reasons were signal problems and billing.

*“Our household would struggle to function without it.”*



66%



27%



65%

Satisfaction with service overall



87%



89%



92%



Had a reason to complain about service or provider in last 12 months



13%



5%



4%

## Quality of service can vary by provider

Many aspects of service, from dealing with customer calls through to installations and repairs, differ by provider. We think people should be able to take this into account when they choose a new service. We're publishing information to help people understand what is available and what to expect.

## Broadband and landline services

### Faster broadband packages should deliver a better experience

Many customers using standard 'up to 17Mb' broadband receive speeds that may be too slow for their day-to-day activities. Superfast products are significantly faster on average and upgrading to these, where available, should improve the customer's experience.

### But the speed of some 'superfast' services varies across the day

Although Virgin Media customers get faster speeds on average than those with other superfast packages, a small minority suffer severe slowdowns at peak times. Our research into home broadband speeds shows that, in November 2016, 9% of customers on Virgin Media's 'up to 50Mb' package and 6% on its 'up to 100Mb' package received average speeds of less than 10Mbit/s between 8 and 10pm.

### Service problems can arise in the home and on the network

Many broadband and landline service problems arise in the home. If diagnosed correctly, these can often be resolved quickly by providers through effective customer support. Other service problems involve a fault on the network and may need to be dealt with by an engineer.

For customers on the network operated by Openreach (the part of BT responsible for repairs and installations), these network faults occur around once every nine years for lines carrying standard broadband, once every six to seven years for lines carrying superfast broadband and once every twelve years for landline-only services.<sup>1</sup>

Type	Technology	Advertised speeds (Mbit/s)	8-10pm average speed (Mbit/s)
Standard	ADSL2+ copper line	up to 17	9.8
Superfast	Fibre-to-the-cabinet	up to 38	33
		up to 52	47
		up to 76	60
	Cable (Virgin Media only)	up to 50	42
		up to 100	79
		up to 200	150

## Common causes of service problems in the home

Faulty home wiring 

Incorrect router or wall-socket set-up 

Old or faulty router 

Faulty phone handset or computer 

WiFi interference from other devices 

<sup>1</sup> Ofcom, *Quality of Service for WLR, MPF and GEA, Consultation on proposed quality of services remedies*, March 2017, p. 37: [https://www.ofcom.org.uk/data/assets/pdf\\_file/0033/99645/QoS-WLR-MPF-GEA.pdf](https://www.ofcom.org.uk/data/assets/pdf_file/0033/99645/QoS-WLR-MPF-GEA.pdf)

### Providers can improve the experience of repairs

When a fault is reported, the provider must make a diagnosis and decide what action to take. If providers using Openreach identify a network fault, they rely on Openreach engineers to fix the problem. For customers of these providers, how quickly a network fault is fixed depends in part on when the issue is referred to Openreach and the level of service the provider has paid for from Openreach. Although Openreach does not always meet its targets, being on a better service level will generally result in a faster fix.

In 2016 most providers that rely on Openreach paid for repairs within two working days (the lowest service level) for most of their customers. At the start of 2016, Sky and TalkTalk purchased

Openreach's next-working-day service maintenance level for most of their customers. During the year, both providers decided to downgrade that service level to Openreach's two-working-day repair service level. In contrast, in summer 2016 BT upgraded most of its customers on to Openreach's next-working-day service level.

### Providers can make a real difference to how new services are installed

Some types of installations are quicker than others. However, providers' processes, such as the time it takes to dispatch a router, can affect how quickly new services are delivered. Providers are also responsible for managing any delays and the impacts these have on customers. Unexpected delays affected around one in ten orders in 2016, and many other customers had their original install date postponed at least once.

### Three per cent of appointments for engineer visits are missed

When customers waited in for a service to be installed or repaired in 2016, around 3% of appointments were missed. Openreach significantly reduced the proportion of appointments its engineers missed during 2016, from 6% in January to 2% in December.<sup>2</sup> Less

## Openreach repair level used for most residential customers (December 2016)

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

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

## Average time to provide a new service, by order type (providers on Openreach network)



*Calendar days. Retail provider data.*

<sup>2</sup> In relation to the residential customers of the providers we are reporting on. Ofcom analysis of retail provider data.

than 1% of appointments with Virgin Media engineers did not take place on the agreed day (though some on-the-day appointments took place before or after the agreed slot).

### Most providers rely on Openreach engineers to install new services and repair network faults

Except for Virgin Media, the UK's largest landline and broadband providers rely on Openreach to install and maintain their connections. Openreach's performance therefore affects the experience of many customers, and it is subject to minimum standards set by Ofcom. Although it has generally met these standards, we are consulting on introducing new binding targets for repairs and installations, as it is our view that Openreach could do better in these areas.<sup>3</sup>

### Many customers are waiting too long to speak to their provider on the phone

Customer service in telecoms appears to trail behind other sectors; for example, it came bottom of the Institute of Customer Service's Satisfaction Index for the second year in a row in 2016.<sup>4</sup>

On average, broadband and landline customers waited around three minutes to speak to an advisor on the phone in 2016. Calls to technical support took on average two and a half minutes longer to answer than sales calls.

### Satisfaction with how complaints are handled is low

Our research found that just 56% of those complaining about their broadband service were satisfied with how their issue was handled. Only three in five broadband customers were satisfied that their provider showed a willingness to help resolve the issue, and just two in five (43%) were satisfied with the ease of getting through to their provider on the phone.

## Openreach performance (Oct-Dec 2016)



**On-time installations:**  
93%



**Repairs within agreed time (one working day):**  
78%



**Repairs within agreed time (two working days):**  
83%

*Openreach published KPIs*

## Average call waiting time

**Longest:**  
**Plusnet**  
(7min 27sec)



**Shortest:**  
**TalkTalk**  
(47sec)

## Average call waiting time

**Sales:**  
**1 min 19 sec**

**Tech support:**  
**3 min 54 sec**



## Satisfaction with how complaint was handled

**Highest:**  
**Sky**  
(61%)



**Lowest:**  
**TalkTalk**  
(51%)

<sup>3</sup> Quality of Service for WLR, MPF and GEA

<sup>4</sup> The Institute of Customer Service, UK Customer Satisfaction Index, January 2017:

<https://www.instituteofcustomerservice.com/research-insight/uk-customer-satisfaction-index>

## Mobile services

### Coverage is the most important factor in a consumer's mobile experience

Coverage levels vary by operator, and can affect how satisfied people are with their service. Poor coverage is a particular problem for people in rural areas, where 19% were dissatisfied with their reception, compared to just 6% in urban areas.

But where there is coverage, our research indicates that voice call quality is typically good and the vast majority of calls made are successful. Similarly, when consumers with 4G are able to make a data connection, websites usually load successfully within seconds.

### Two in five mobile data connections made by 4G customers were to 3G or 2G networks

The quality of experience for data services is markedly better over 4G networks. However, our research found that when those with 4G contracts were using mobile data, 35% of the time they did not have a 4G data connection but were on 3G or 2G.

Ofcom provides a [checker tool](#) to help consumers make informed decisions about which operator's coverage is the most likely to meet their needs.

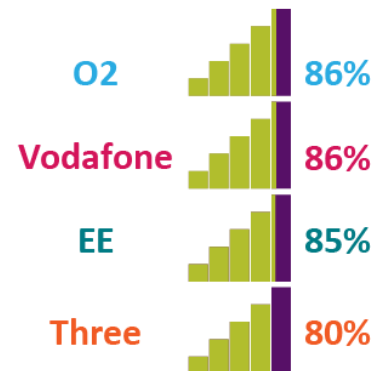
### Customer service varies significantly between mobile providers

While most mobile providers answered calls in less than two minutes, on average, when customers went on to make a complaint only 57% said they were satisfied overall with how their complaint had been handled.

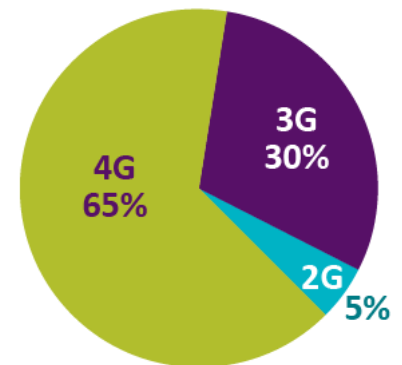
There were important differences between providers. Around three-quarters of Tesco Mobile customers who made a complaint were satisfied with how their complaint was handled, while less than half of Vodafone customers who complained were satisfied.

This is reflected in the numbers of complaints received by Ofcom in 2016, with Vodafone customers making the most complaints per 100,000 subscribers (92) and Tesco Mobile customers making the fewest (3).

## Satisfaction with reception by mobile network operator



## Technology used when using mobile data for apps



## Satisfaction with how complaint was handled



## **This report is just one part of Ofcom’s plan to improve service quality**

By publishing this report, we hope to equip consumers with information to help them make more informed decisions and to give providers an additional incentive to improve their overall service quality. However, we recognise there are limits to what can be achieved by simply making more information available. This report is one element of Ofcom’s plan to improve service quality, which also includes:

- introducing automatic compensation for consumers affected by poor service quality. We have published a consultation document inviting stakeholder comments by 5 June 2017;
- setting tougher quality of service standards for Openreach, and establishing new ones where appropriate;
- setting wholesale price controls that strengthen Openreach’s incentives to make long-term investments in service quality;
- undertaking a programme of work to improve mobile coverage, including considering how new coverage obligations can be used to improve availability and quality of coverage; and
- strengthening the rules on complaints handling as part of our current review of the General Conditions.

## **Let us know what you think about this report, so we can improve our future reports**

We have not been able to publish some information that we believe would be useful for consumers in this first report, because providers do not collect it in a way that allows for meaningful comparison. In future, we expect to be able to use new powers conferred by the Digital Economy Bill to ensure that providers collect information in a way that will allow more aspects of their performance to be directly compared.

We will monitor how the data we have published is used by consumers to help us understand how we can make it even more relevant and accessible. We welcome comments on this report and suggestions for information we should include in future reports. These should be sent to

[comparing-service-quality@ofcom.org.uk](mailto:comparing-service-quality@ofcom.org.uk)










## Broadband – overview of key data (2016)

Ofcom metrics		Overall Average	BT	EE	Plusnet	Sky	TalkTalk	Virgin Media
Ofcom complaints per 100,000 subscribers		75	127	108	113	26	98	40
Consumer research metrics		<i>(figures marked in bold purple are statistically better than average, those bold red statistically worse)</i>						
Satisfaction		87%	84%	-	-	88%	83%	<b>91%</b>
Satisfaction with reliability		86%	83%	-	-	88%	83%	<b>90%</b>
Customers with a reason to complain		13%	13%	12%	<b>8%</b>	12%	<b>16%</b>	<b>16%</b>
Satisfaction with complaints handling		56%	56%	53%	-	<b>61%</b>	<b>51%</b>	54%
Industry metrics (landline and broadband)								
Average call waiting time (mm:ss)		02:51	03:59	00:52	07:27	01:42	00:47	01:39
Customers hanging up before speaking to someone		10%	13%	4%	21%	7%	4%	7%

For definitions and methodology see relevant report section and annexes 1-3. Satisfaction/satisfaction with reliability reported as of June 2016. Customers with a reason to complain is percentage of those who reported in December 2016 to have had a reason to complain in the last 12 months. Satisfaction with complaints handling refers to proportion of customers who reported in December 2016 having made a complaint in the last six months who reported being satisfied overall with how their complaint was handled. '-' indicates a sufficient sample was not obtained through consumer research to be able to publish a metric for that particular provider. Metrics for KCOM (which operates in the Hull and East Yorkshire areas) are not included in this summary but covered later in the report. Averages for industry metrics include KCOM's performance.



## Landline – overview of key data (2016)








	Overall Average	BT	EE	Plusnet	Post Office	Sky	TalkTalk	Virgin Media
<b>Ofcom metrics</b>								
Ofcom complaints per 100,000 subscribers 	56	71	76	89	89	25	85	36
<b>Consumer research metrics</b>	<i>(figures marked in bold purple are statistically better than average, those bold red statistically worse)</i>							
Satisfaction 	89%	<b>92%</b>	-	-	-	90%	83%	85%
Satisfaction with reliability 	91%	93%	-	-	-	91%	88%	91%
Customers with a reason to complain 	5%	6%	4%	5%	3%	4%	6%	4%
Satisfaction with complaints handling 	62%	62%	-	-	-	65%	61%	58%
<b>Industry metrics (landline and broadband)</b>								
Average call waiting time (mm:ss) 	02:51	03:59	00:52	07:27	01:29	01:42	00:47	01:39
Customers hanging up before speaking to someone 	10%	13%	4%	21%	9%	7%	4%	7%

For definitions and methodology see relevant report section and annexes 1-3. Satisfaction/satisfaction with reliability reported as of June 2016. Customers with a reason to complain is percentage of those who reported in December 2016 to have had a reason to complain in the last 12 months. Satisfaction with complaints handling refers to proportion of customers who reported in December 2016 having made a complaint in the last six months who reported being satisfied overall with how their complaint was handled. '-' indicates a sufficient sample was not obtained through consumer research to be able to publish a metric for that particular provider. Metrics for KCOM (which operates in the Hull and East Yorkshire areas) are not included in this summary but covered later in the report. Averages for industry metrics include KCOM's performance.





## Mobile – overview of key data (2016)

Ofcom metrics		Overall Average	EE	O2	Tesco Mobile	Three	Virgin Mobile	Vodafone
Ofcom complaints per 100,000 subscribers 		35	18	12	3	14	24	92
Consumer research metrics		<i>(figures marked in bold purple are statistically better than average, those bold red statistically worse)</i>						
Satisfaction 		92%	92%	93%	<b>96%</b>	89%	94%	89%
Satisfaction with reception 		86%	85%	86%	91%	<b>80%</b>	87%	86%
Customers with a reason to complain 		4%	4%	3%	2%	5%	5%	<b>7%</b>
Satisfaction with complaints handling 		57%	57%	60%	<b>74%</b>	60%	60%	<b>46%</b>
Industry metrics <i>(landline and broadband)</i>								
Average call waiting time (mm:ss) 		01:00	00:35	02:03	00:30	01:10	00:38	01:04
Customers hanging up before speaking to someone 		6%	3%	8%	-	6%	7%	5%

For definitions and methodology see relevant report section and annexes 1-3. Satisfaction/satisfaction with reception reported as of June 2016. Customers with a reason to complain is percentage of those who reported in December 2016 to have had a reason to complain in the last 12 months. Satisfaction with complaints handling refers to proportion of customers who reported in December 2016 having made a complaint in the last six months who reported being satisfied overall with how their complaint was handled. '-' indicates information was not supplied in line with Ofcom requirements for industry metric.