



Residential mobile services

Overview

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

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

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

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

Overall satisfaction

Customer satisfaction with their mobile service remains very high

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

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

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

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

Source: *Ofcom Customer Satisfaction Tracker survey 2018*

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

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

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

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

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

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

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

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

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

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

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

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

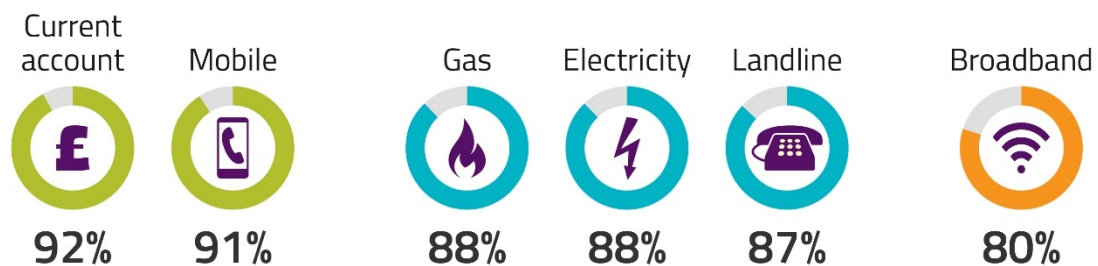
Giffgaff and Tesco Mobile customers were more likely than average to say they would recommend their provider to a friend.¹¹⁴ In contrast, Vodafone and Virgin Mobile customers were less likely than average to say they would do so.

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

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

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

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



Source: *Ofcom Customer Satisfaction Tracker survey 2018*

L1/M2/IN2/PT1/B1/BM3/BM9/BM10: In terms of your (SERVICE) how satisfied are you with the overall service provided by (PROVIDER)? Would you say you are...

Base: All adults aged 16+ who are the decision maker and express an opinion on their landline service(2252), their mobile phone service (2861), their fixed broadband service (2263), their pay TV service (1487), their services taken with the same supplier (2182), their main current account provider (2867), their gas provider (2212), their electricity provider (2536). ‘Don’t know’ responses have been excluded from the base

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

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

Customer service¹¹⁵

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

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

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

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

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

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

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

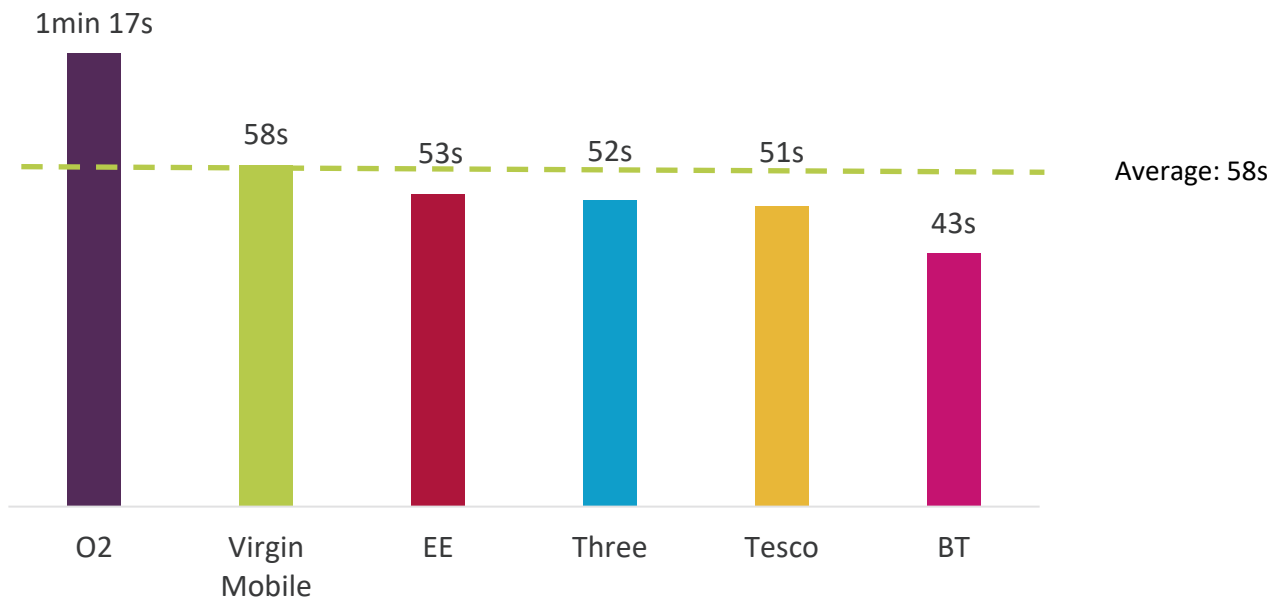
¹¹⁶ They are therefore not included in the call metrics below.

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

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

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

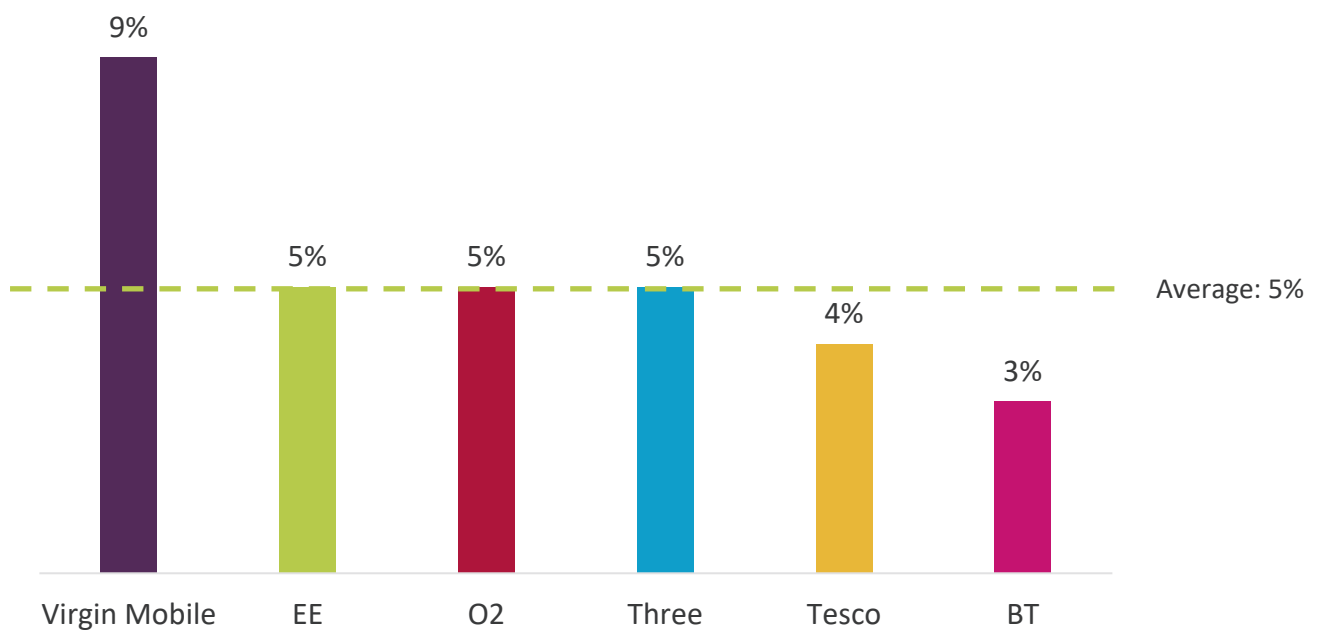
Figure 33: Average call waiting time, mobile providers



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

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

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



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

Reasons to complain and complaints volumes

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

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

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

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

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

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

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

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

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

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

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

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

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

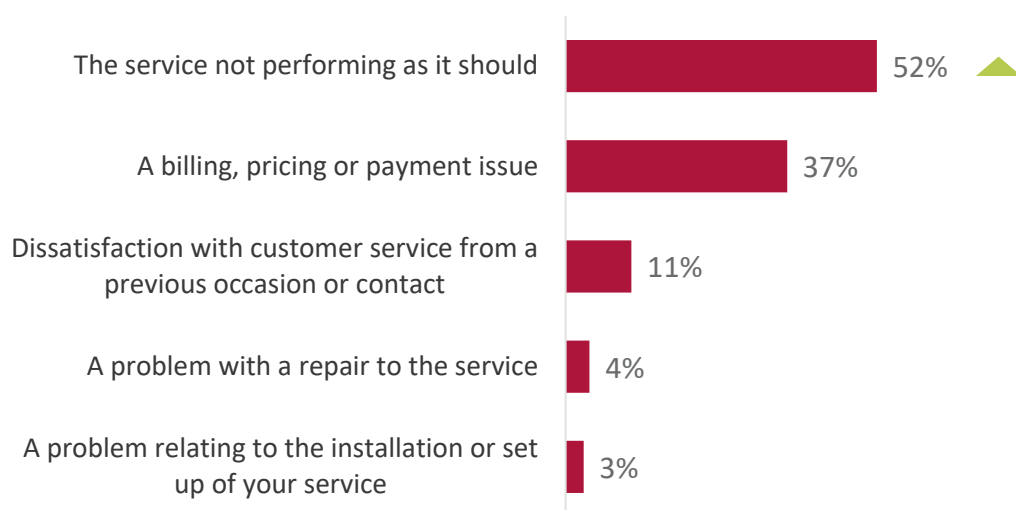
¹²¹ Fieldwork was conducted in January 2018, therefore reasons to complain date back to January 2017.

¹²² Whether or not they went on to make a complaint

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

¹²⁴ The proportion was 42% in 2016.

Figure 36: Reason to complain about mobile provider



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

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

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

Arrows represent a significant increase or decrease compared to 2016.¹²⁵

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

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

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

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

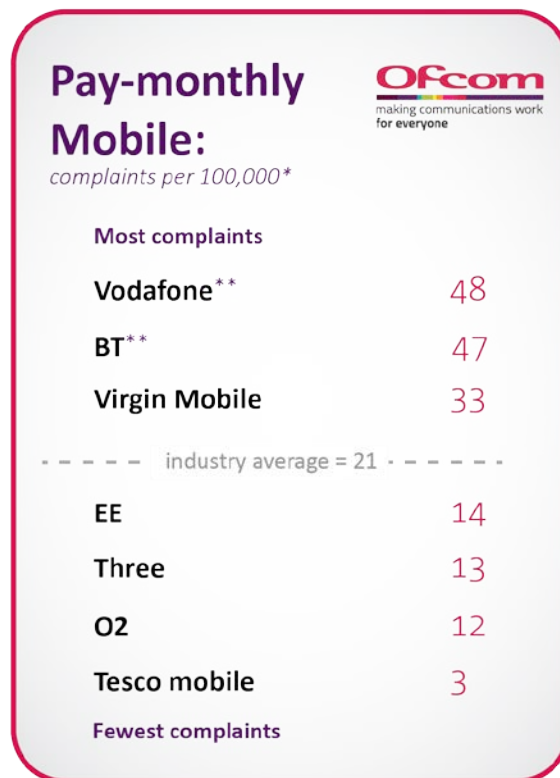
¹²⁶ Further information about how we compile our complaints data can be found in our most recent quarterly report publication: Ofcom, [Telecoms and pay-TV complaints data](#).

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

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

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

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



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

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

Complaints handling¹³¹

Tesco Mobile and EE had high satisfaction with complaints handling

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

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

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

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

Figure 38: Mobile – satisfaction with complaints handling

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

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

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

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

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

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

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

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

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

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

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

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

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

Just over half of all mobile complaints were completely resolved

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

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

Figure 40: Mobile – satisfaction with resolution of complaints

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

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

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

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

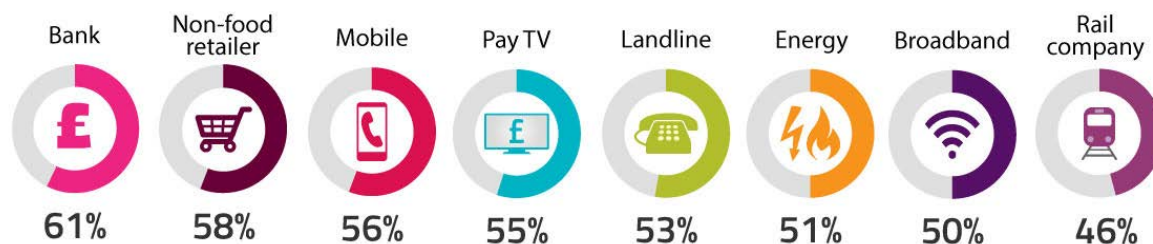
Red or green shading and * indicates significantly lower/higher than the sector average at the 95% confidence level.

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

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

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

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



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

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

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

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

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

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

Complaints taken to an alternative dispute resolution scheme

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

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

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

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

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

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

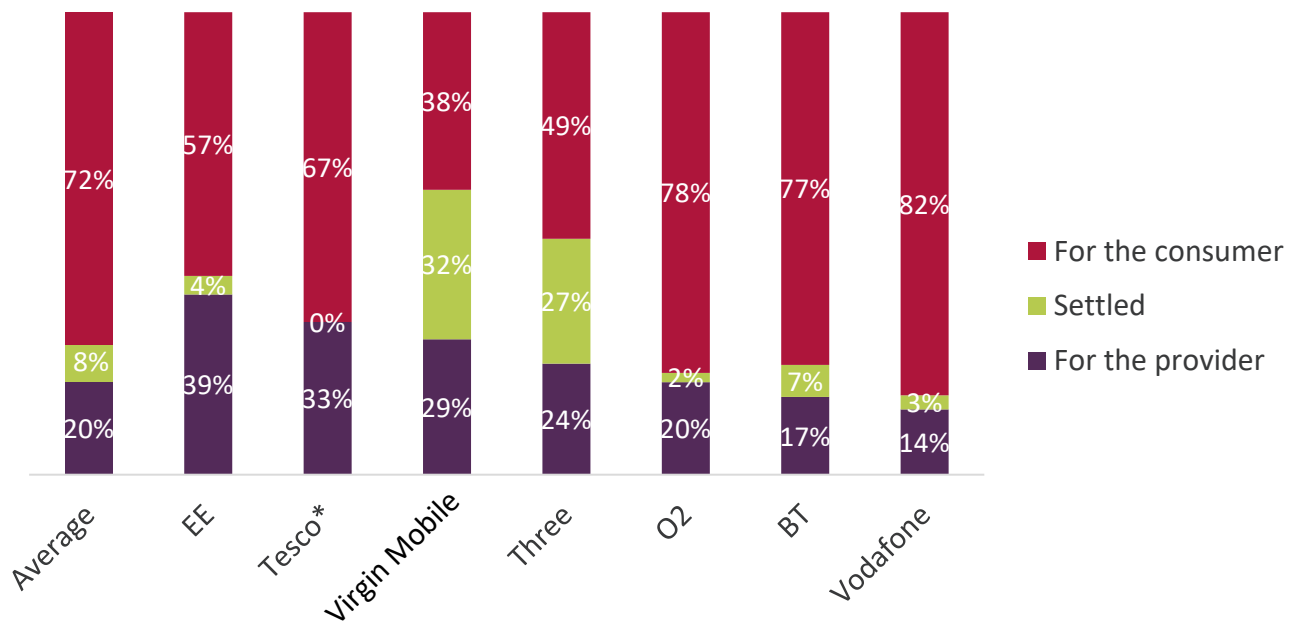
	Most Common	Second Most Common
BT	Billing (31%)	Service Quality (23%)
EE	Billing (34%)	Contract Issues (16%)
O2	Billing (33%)	Contract Issues (19%)
Tesco	Billing (32%)	Contract Issues (18%), Service Quality (18%), Security (18%)
Three	Billing (30%)	Service Quality (22%)
Virgin Mobile	Billing (36%)	Contract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

Source: CISAS and OS data

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

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

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



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

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