

Quality of Customer Service – Complaints

Produced by: BDRC

Fieldwork: December 2017/January 2018

Contents

Slide	Section
3	<u>Background and Objectives</u>
5	<u>Methodology</u>
9	<u>Executive summary</u>
12	<u>Sector overview</u>
23	<u>Results by communications sector</u>
24	<u>Broadband complaints</u>
41	<u>Landline complaints</u>
58	<u>Mobile complaints</u>
75	<u>Pay TV complaints</u>

Background

Communications providers in the research

Since 2009 Ofcom has conducted research to quantify levels of satisfaction with customer service for the main communications providers in the UK (defined as those with a 4% or more market share).

Following a review, in 2016 Ofcom refocused the study to monitor customer satisfaction with complaints handling. Consequently this research monitors satisfaction with customer service provided to customers who have contacted their provider with a complaint in the six months prior to fieldwork. As such, the data is comparable with the Quality of Customer Service – Complaints 2016 research, but not directly comparable with other previous quality of customer service research conducted by Ofcom.

As with the previous quality of customer service research, this research includes UK communications providers with a market share of 4% or more (Q1 2017.) The providers included in the research are listed below.

Broadband	Landline	Mobile	Pay TV
BT	BT	EE	BT
EE	Sky	O2	Sky
Sky	TalkTalk	Tesco Mobile	TalkTalk
TalkTalk	Virgin Media	Three	Virgin Media
Virgin Media		Virgin Mobile	
Plusnet		Vodafone	
		giffgaff	

Objectives

Core objectives for this study

- The core aim of this study is understand the level of satisfaction with customer service on a range of criteria across the main providers of fixed broadband, pay TV, mobile and fixed voice services among those who have contacted their provider with a complaint within the last six months.
- To report customer service satisfaction and consumer perceptions of provider performance by types of complaint i.e. billing and customer service, repairs and installation, service issues for each of the main providers in each sector.
- To gather an overall customer satisfaction with customer service measure for all providers per sector.

Methodology

Sample

- The overall sample size is 6,700 interviews
- Targets were set by provider within sector in order to ensure that a minimum number of interviews per cell was achieved for the purposes of analysis
- See sample distribution slide for further details of cells included in the research

Data collection

- The survey was conducted among an online panel sample
- Online research allowed a cost effective and efficient means to reach the low incidence audience Ofcom wished to consult
- Fieldwork took place from 28th November 2017 to 7th January 2018. Therefore the last six month time period refers to complaints to providers in the second half of 2017.

Data reporting

- Data is reported on a total sector level (i.e. the combined results of the providers included in the research for each sector) as well as split by provider within each sector
- The total has been weighted to represent complaints within each sector among the providers included, using market share and incidence of complaint data for each provider

Methodology

Weighting

- The data is presented at both a total sector level and at a provider level. We have weighted the total sector level data only, provider level data is unweighted.
- Total sector level data has been weighted using market share and incidence of complaints for each provider, in order to report total sector figures that best represent the make up of complaints within each sector. This was done using market share data and the incidence of complaint for each supplier and each service which was calculated from the fieldwork data.
- There were several reasons why we chose this approach:
 - Weighting to market share alone, would not account for the differences in incidence of complaints by provider and, as such, may overweight the effects of some providers that have a larger market share.
 - This approach is repeatable for subsequent waves and will be able to account for changes over time
- The provider level data is unweighted and is therefore representative of customers of the provider **with a complaint in the 6 months prior to fieldwork** and who are **online**.

Methodology

Complaints were grouped into three categories for reporting:

- *Billing and customer service* complaints, these could include: unexpected/unclear charges, overcharged or incorrect bill, dissatisfaction with customer service from a previous occasion or contact.
- *Repairs and installation* complaints, these could include; a problem with a repair to the service, for example the time taken to repair, it didn't happen/didn't happen when you were told it would or didn't solve the problem. A problem relating to the installation or set up of your service for example the time taken to install/set up the service, changed/missed/late installation or installation appointment, it was not installed/set up correctly or time taken for hardware to arrive.
- *Service issues* complaints, could include; the service not performing as it should, for example loss of service, unable to use mobile (2G, 3G or 4G) in certain areas, text (SMS or IM) or voice mails delivered late, slow broadband speeds, poor call/line/picture quality or unable to get certain TV channels/content.

Methodology



Sample distribution:

Provider	Sample Sizes by Sector 2017/2018			
	Fixed broadband	Landline	Mobile	Pay TV
BT	717	579		368
EE	291		511	
Sky	720	500		639
TalkTalk	598	420		298
Virgin	804	503	269	519
Plusnet	266			
O2			538	
Tesco Mobile			319	
Three			500	
Vodafone			500	
giffgaff			219	

Data tables

Quality of customer service – complaint handling data tables

Links to the data tables can be found at:

Total sector level data tables:

https://www.ofcom.org.uk/_data/assets/pdf_file/0019/111781/Quality-of-customer-service-total-level-data-tables-weighted.pdf

Provider level data tables:





https://www.ofcom.org.uk/_data/assets/pdf_file/0020/111782/Quality-of-customer-service-supplier-level-data-tables-unweighted.pdf

Executive summary

Executive summary: satisfaction with complaint handling



Overall satisfaction with providers' handling of most recent complaint

	Above market average	In line with market	Below market average
 Fixed broadband	EE, Sky	BT, Plusnet, Virgin Media	TalkTalk
 Landline	Sky	BT, Virgin Media	TalkTalk
 Mobile	EE, Tesco Mobile	giffgaff, O2, Three,	Virgin Mobile, Vodafone
 Pay TV		BT, Sky	TalkTalk, Virgin Media

Executive summary: satisfaction with complaints handling – by sector



- **Half** (50%) of fixed broadband customers who contacted their provider with a complaint were satisfied with how the complaint was handled, a decline since 2016 (56%). Overall satisfaction with complaint handling was higher for **EE** (59%) and **Sky** (57%) and lower for **TalkTalk** (40%).
 - Compared to 2016 **BT**, **TalkTalk** and **Virgin Media** all saw declines in overall satisfaction.



- **Over half** (53%) of landline customers who contacted their provider with a complaint were satisfied with how the complaint was handled, a decline since 2016 (62%). Overall satisfaction with complaint handling was higher for **Sky** (58%) and lower for **TalkTalk** (44%).
 - Compared to 2016 **TalkTalk**, **Sky** and **BT** all saw declines in overall satisfaction.



- **Over half** (56%) of mobile customers who contacted their provider with a complaint were satisfied with how the complaint was handled. Overall satisfaction with complaint handling was higher for **Tesco Mobile** (67%) and **EE** (61%) and lower for **Virgin Mobile** (49%) and **Vodafone** (47%).
 - Compared to 2016 only **Virgin Mobile** declined for overall satisfaction.



- **Over half** (55%) of pay TV customers who contacted their provider with a complaint were satisfied with how the complaint was handled, a decline since 2016 (64%). Overall satisfaction with complaint handling was lower for **TalkTalk** (48%) and **Virgin Media** (47%).
 - Compared to 2016 **TalkTalk**, **Virgin Media** and **BT** all saw declines in overall satisfaction.

Sector overview

Executive summary – sector overview (1)

High level summary:

Satisfaction: overall and by complaint type

- Satisfaction with complaint handling was lower for **broadband** (50%) compared to **landline** (53%), **mobile** (56%) and **pay TV** (55%).
- By complaint type, satisfaction with complaints handling was the same across sectors for *billing and customer service* and *repairs and installations* complaints. However, for *service issues* complaints: **broadband** was lower than all other sectors and **mobile** was higher than all other sectors.
- Compared to 2016, satisfaction with complaints handling:
 - Decreased overall for **landline** – driven mostly by *repairs and installation* and *service issues* complaints
 - Is in line with the previous year in the **mobile** market
 - Decreased overall for **broadband** – driven by *service issues* complaints
 - Decreased overall for **pay TV** – driven by all three types of complaints

Executive summary – sector overview (2)

High level summary:

Satisfaction with specific aspects

- Satisfaction with specific aspects of complaints handling varied between markets. Those who made a complaint to their **broadband** provider reported lower satisfaction levels than **landline**, **mobile** and **pay TV** markets across most measures.

Completely resolved

- The proportion of complaints that were completely resolved was lower for **broadband** (49%) compared to **landline** (57%), **mobile** (54%) and **pay TV** (54%).

Satisfaction among completely resolved

- For all sectors, satisfaction with complaint handling was higher among those whose complaint was completely resolved than all complaints.

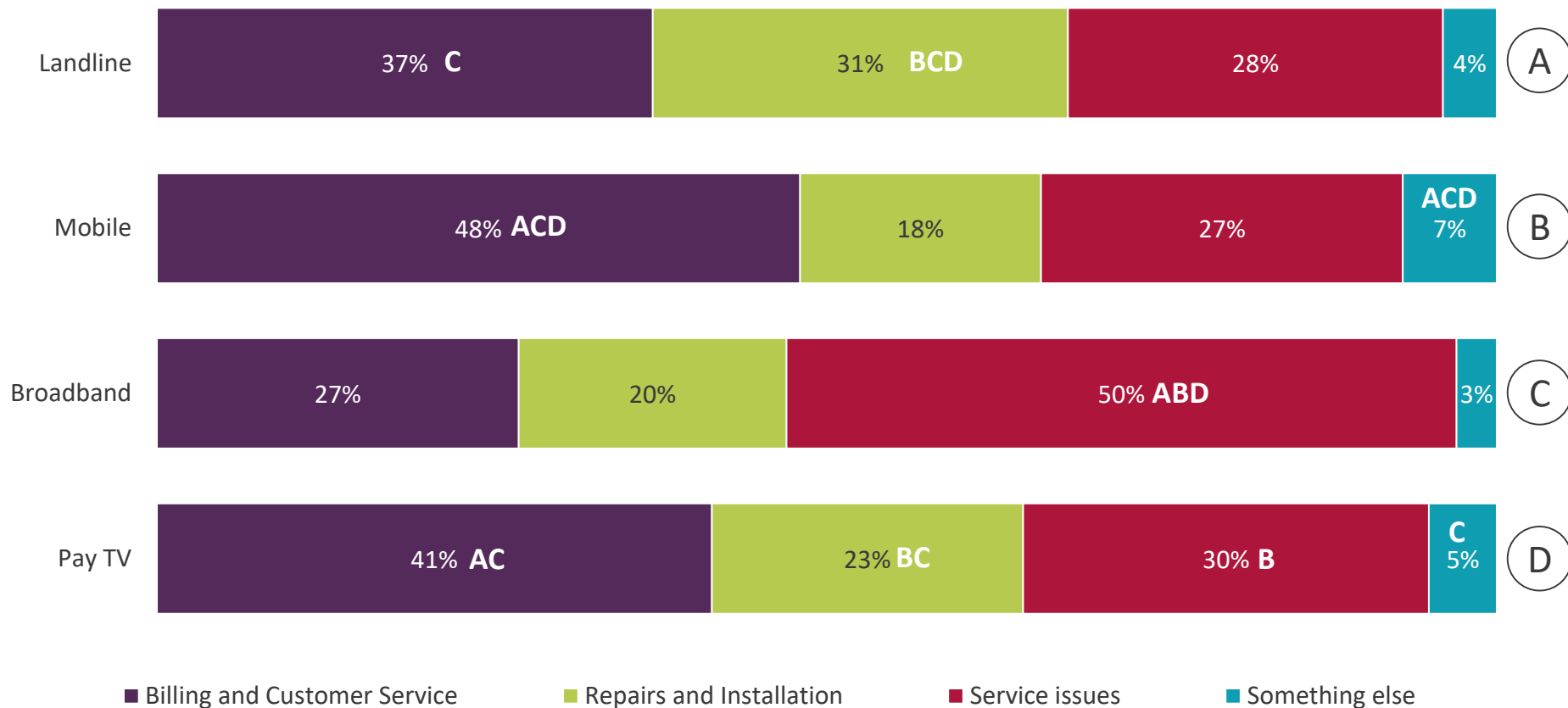
Resolved on first contact

- **Broadband** (35%) complaints were less likely to be resolved on first contact than all other sectors; landline (45%), mobile (43%) and pay TV (41%).

Billing and customer service issues made up the largest proportion of complaints across sectors, with the exception of the broadband market where *service issues* made up the largest proportion of complaints.

Complaint type

All Sectors



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

Q. And thinking of the most recent complaint you had to contact [company] about, which one of the following categories did the issue fall into? Was it to do with...

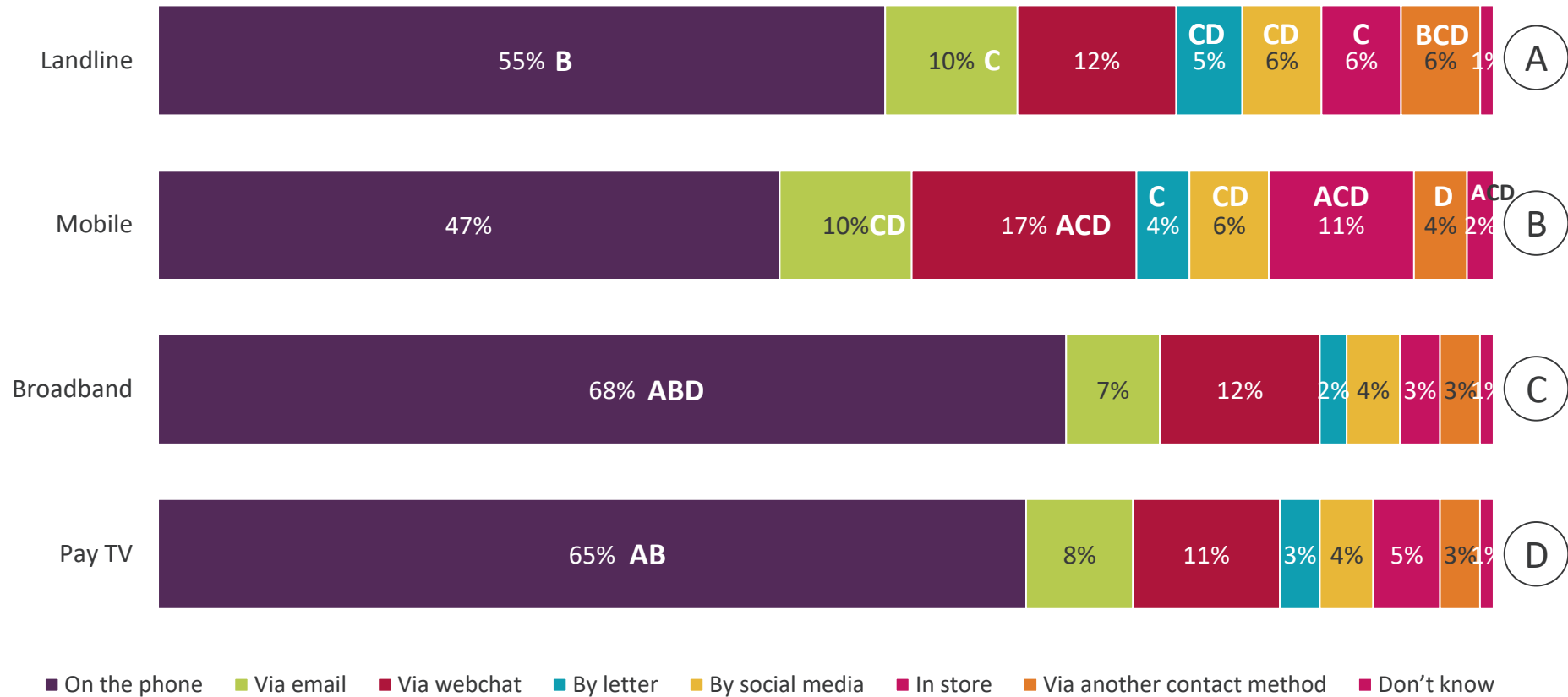
Base: All who complained about each service in past 6 months: Landline (2002), Mobile (2856), Broadband (3396), Pay TV (1824).

A/B/C/D shows significantly higher within category (95% level)

Phone was the dominant form of contacting to complain. This was lower for mobile than for other sectors.



Method of contact (Only / mainly)
All sectors



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

Q. In dealing with [provider] about this complaint did you contact them...?

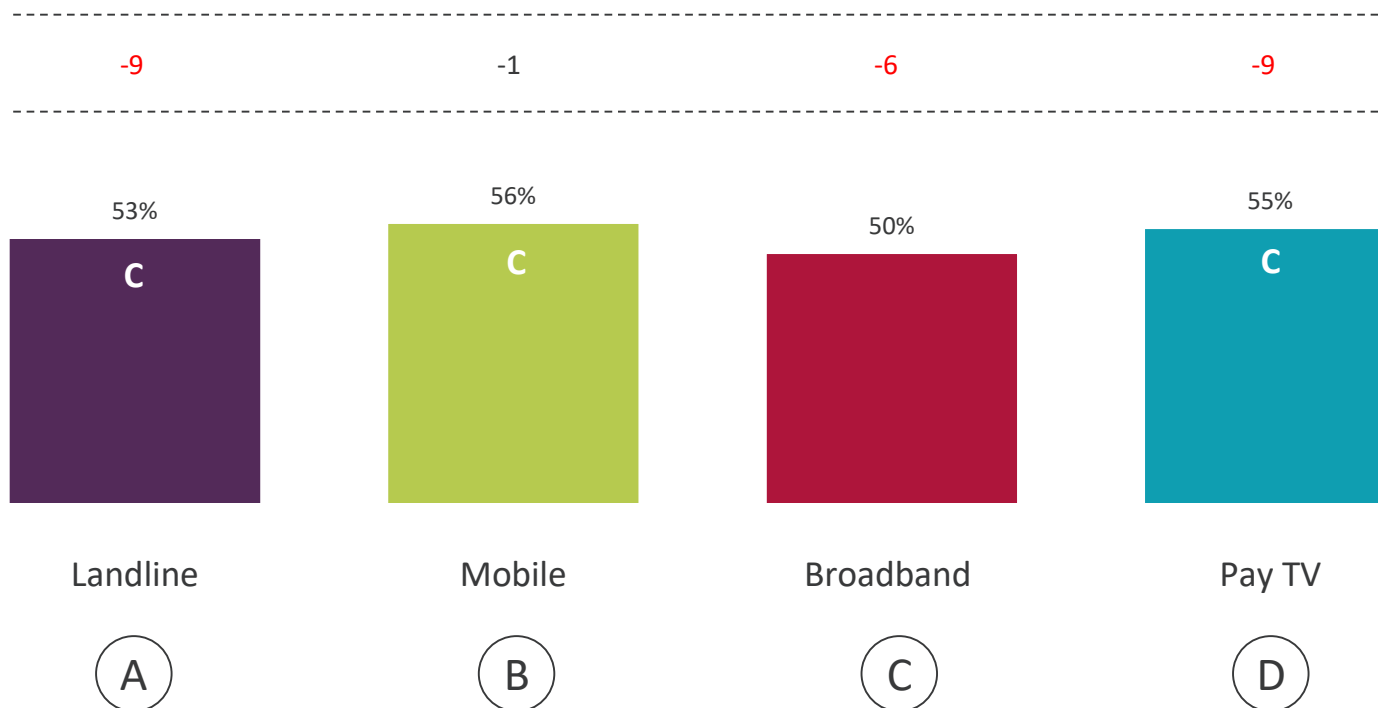
Base: All who complained about each service in past 6 months: 2016: Landline (2468), Mobile (2989), Broadband (3558), Pay TV (2213). 2017: Landline (2002), Mobile (2856), Broadband (3396), Pay TV (1824). A/B/C/D shows significantly higher within category (95% level)

Satisfaction with complaint handling was lower for broadband compared to landline, mobile and pay TV.

Overall satisfaction with provider's handling of most recent complaint

All sectors
% Satisfied (7-10)

% points difference
2017 vs. 2016



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

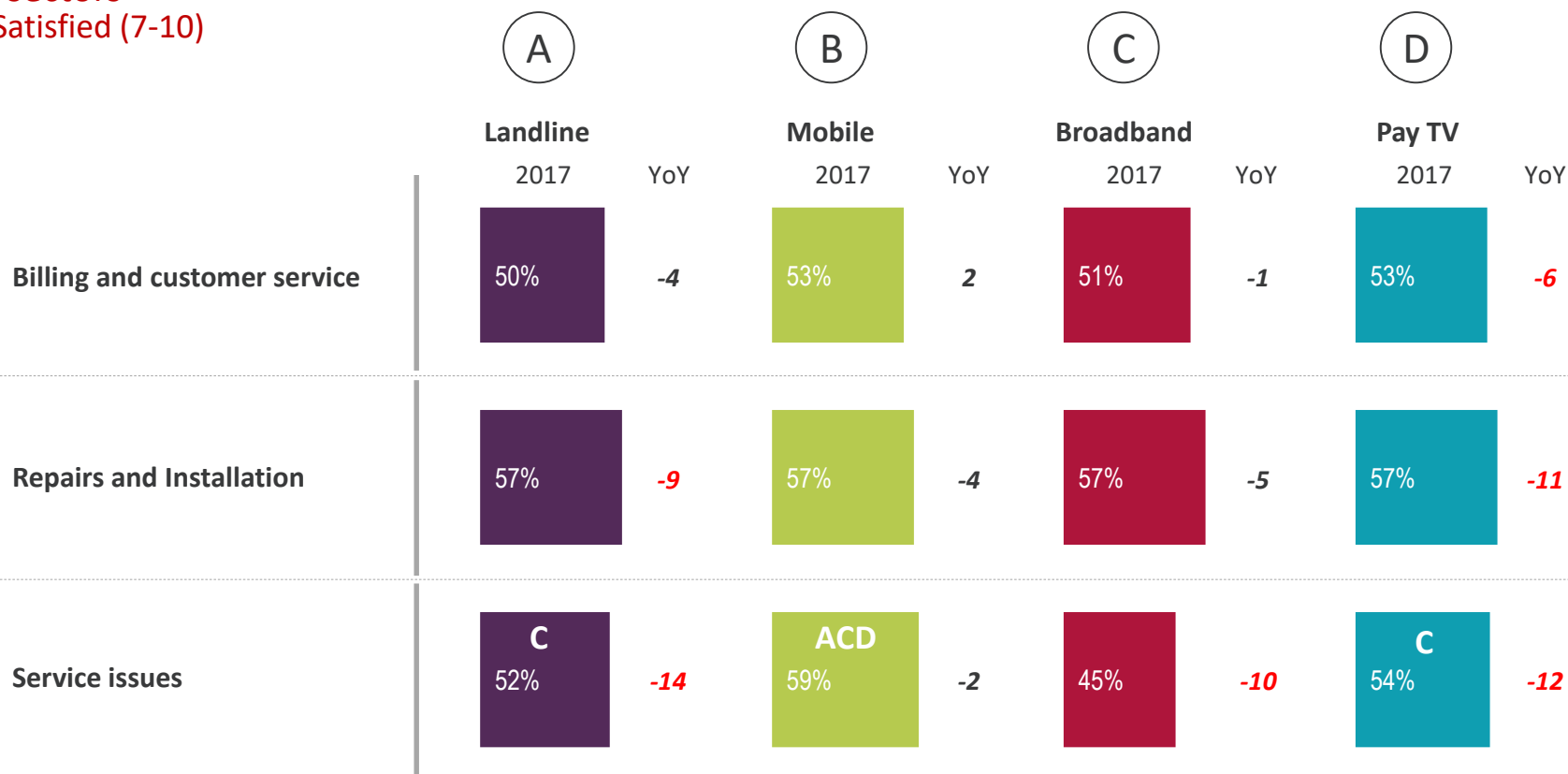
Q. Overall, how satisfied are you with the service you received from [provider] customer services with regard to the complaint that you had?

Base: All who complained about each service in past 6 months: 2016: Landline (2468), Mobile (2989), Broadband (3558), Pay TV (2213). 2017: Landline (2002), Mobile (2856), Broadband (3396), Pay TV (1824). A/B/C/D shows significantly higher within category (95% level). Red or Green text indicates significantly lower/higher than 2016 at the 95% confidence level.

Satisfaction with complaints handling was the same across sectors for *billing and customer service* and *repairs and installations* complaints. However for *service issues* complaints, broadband was lower than all other sectors and mobile was higher than all other sectors.

Satisfaction by complaint type

All sectors
% Satisfied (7-10)



YoY=2017%-2016%

Source: Ofcom Quality of customer service – complaints research, online survey, fieldwork carried out by BDRG, 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: 2016: Landline (2468), Mobile (2989), Broadband (3558), Pay TV (2213). 2017: Landline (2002), Mobile (2856), Broadband (3396), Pay TV (1824). A/B/C/D shows significantly higher within category (95% level). Red or Green text indicates significantly lower/higher than 2016 at the 95% confidence level.

Those who made a complaint to their broadband provider reported lower satisfaction levels than landline, mobile and pay TV markets across most measures.

YoY=2017%-2016%

Satisfaction with specific aspects

All sectors

% Satisfied (7-10)

		A Landline		B Mobile		C Broadband		D Pay TV	
		2017	YoY	2017	YoY	2017	YoY	2017	YoY
Contacting	Ease of finding provider contact details	62%	3	65% A	3	63%	3	63%	3
	Ease of getting through to the right person (phone) ¹	49%	1	53% AC	1	50%	1	51%	1
Speed	The time taken to handle your issue	51% C	-8	56% ACD	-8	46%	-8	51% C	-8
Standard of advice	Getting the issue resolved to your satisfaction	54% C	-11	57% C	-11	49%	-11	57% C	-11
Advisor	Courtesy and politeness of advisors	64%	0	67% A	0	65%	0	68% A	0
	Advisor doing what they said they would do	58% C	-3	59% C	-3	55%	-3	61% C	-3
	Logging of query details to avoid having to repeat yourself	54% C	-6	55% C	-6	49%	-6	55% C	-6
General	Offering compensation or a goodwill payment	47% C	-5	48% CD	-5	36%	-5	44% C	-5
	Willingness to help resolve your issue	59%	-6	62% AC	-6	58%	-6	63% AC	-6

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 each service in past 6 months: 2016: Landline (2468), Mobile (2989), Broadband (3558), Pay TV (2213). 2017: Landline (2002), Mobile (2856), Broadband (3396), Pay TV (1824). A/B/C/D shows significantly higher within category (95% level). Red or Green text indicates significantly lower/higher than 2016 at the 95% confidence level.

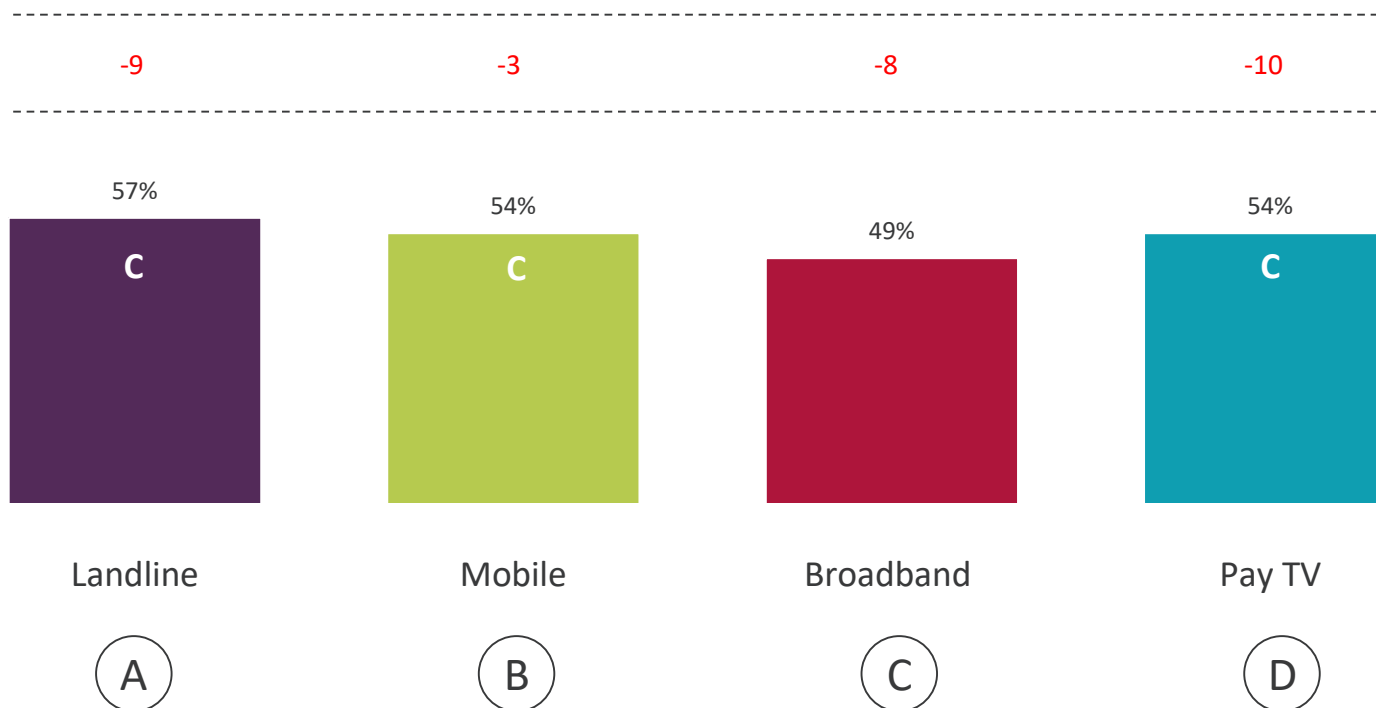
¹All contacting by phone (1119/1305/2324/1119)

The proportion of complaints that were completely resolved was lower for broadband compared to landline, mobile and pay TV.

Proportion whose most recent complaint was completely resolved

All sectors
% Completely Resolved

% points difference
2017 vs. 2016



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?

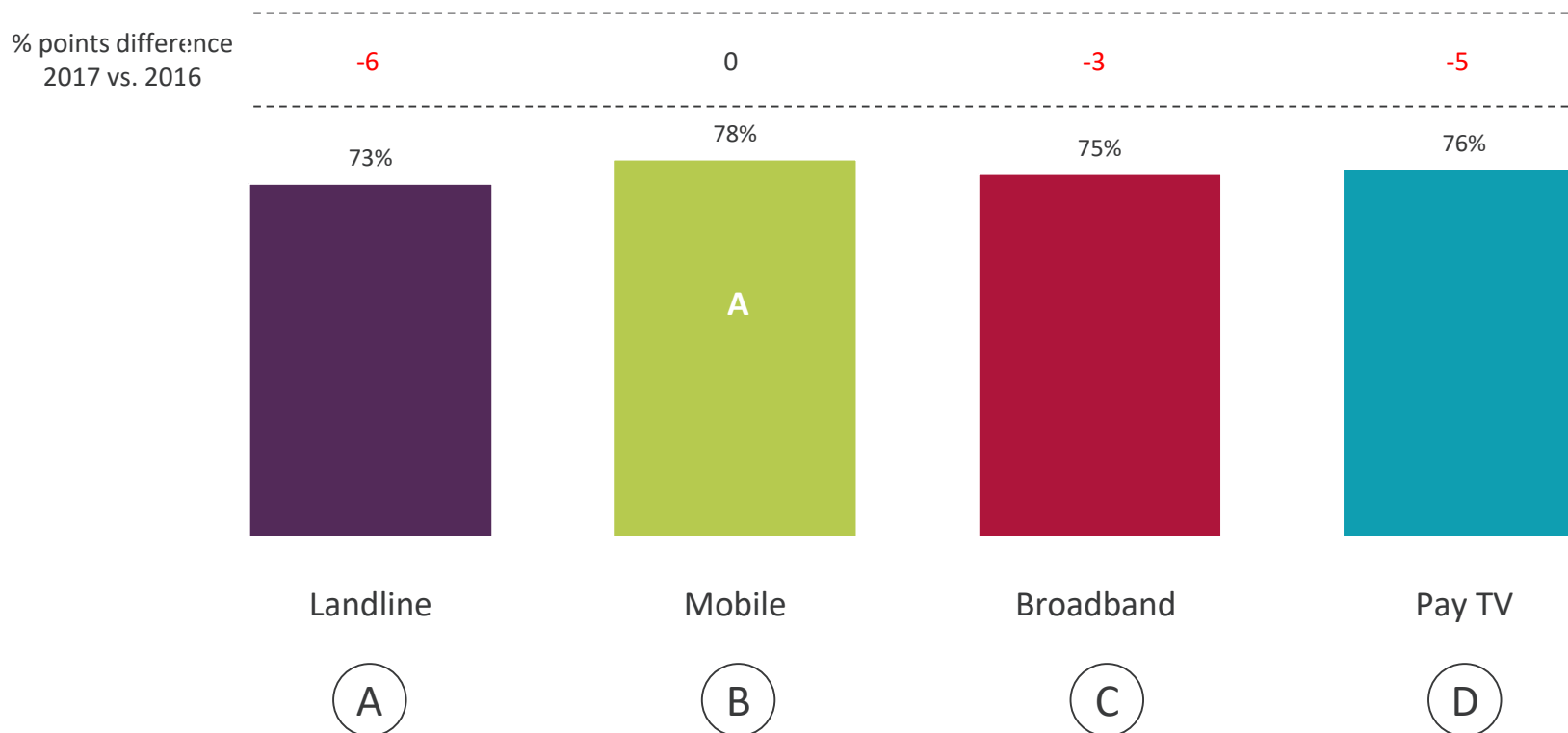
Base: All who complained about each service in past 6 months: 2016: Landline (2468), Mobile (2989), Broadband (3558), Pay TV (2213). 2017: Landline (2002), Mobile (2856), Broadband (3396), Pay TV (1824). A/B/C/D shows significantly higher within category (95% level). Red or Green text indicates significantly lower/higher than 2016 at the 95% confidence level.

For all sectors, satisfaction with complaint handling was higher among those whose complaint was completely resolved than all complaints.

Overall satisfaction with provider's handling of most recent complaint

Among completely resolved complaints – All sectors

% Satisfied (7-10)



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

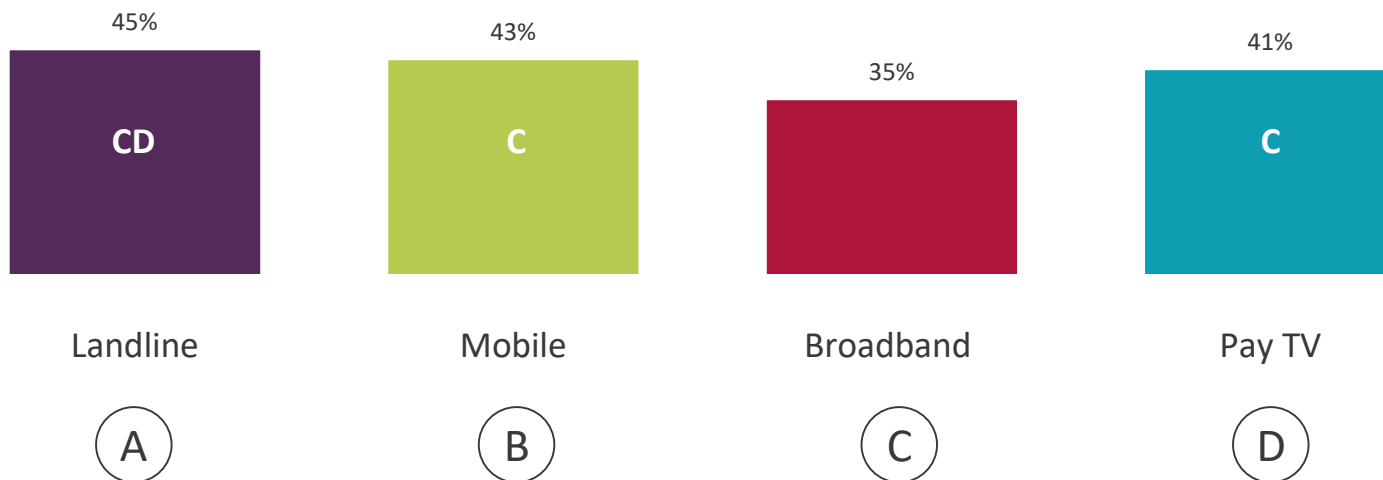
Q. Overall, how satisfied are you with the service you received from [provider] customer services with regard to the complaint that you had?

Base: All who complained about each service in past 6 months whose issue was completely resolved: 2016: Landline (1583), Mobile (1758), Broadband (2010), Pay TV (1467). 2017: Landline (1109), Mobile (1525), Broadband (1655), Pay TV (979). A/B/C/D shows significantly higher within category (95% level). Red or Green text indicates significantly lower/higher than 2016 at the 95% confidence level.

Broadband complaints were less likely to be resolved on first contact than all other sectors. Pay TV complaints were less likely to be resolved on first contact than landline complaints.

Proportion where complaint was resolved on first contact

Landline complaints
% resolved 1st contact



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

Q. You said that your complaint was completely resolved, was it completely resolved on your first contact with PROVIDER?

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

A/B/C/D shows significantly higher within category (95% level). Red or Green text indicates significantly lower/higher than 2016 at the 95% confidence level.

Results by communications sector

Broadband complaints

Executive summary – fixed broadband (1)

High level summary:

Overall satisfaction

- **Half** (50%) of fixed broadband customers who contacted their provider with a complaint were satisfied with how the complaint was handled, a decline since 2016 (56%). Overall satisfaction with complaint handling was higher for **EE** (59%) and **Sky** (57%) and lower for **TalkTalk** (40%).
 - Compared to 2016 **BT**, **TalkTalk** and **Virgin Media** all saw declines in overall satisfaction.

Satisfaction among completely resolved

- **Three in four** (75%) customers whose complaint was completely resolved were satisfied with complaint handling, there was no variation by provider.

Completely resolved

- **Half** (49%) of broadband complaints were completely resolved, a decline since 2016 (57%). **EE** (57%) and **Sky** (53%) resolved a higher proportion and **TalkTalk** (37%) resolved a lower proportion.
 - Compared to 2016 **BT**, **TalkTalk** and **Virgin Media** all saw declines in the proportion of complaints that were completely resolved.

Executive summary – fixed broadband (2)

High level summary:

Satisfaction by complaint type

- Satisfaction with *repairs and installation* complaints was higher than average for **EE** and lower for **TalkTalk** – compared to 2016, **EE** increased and **Sky** declined. *Service issues* complaints were higher than average for **EE** and **Sky**, and lower for **TalkTalk** – compared to 2016, **BT**, **TalkTalk** and **Virgin Media** declined.

Resolved on first contact

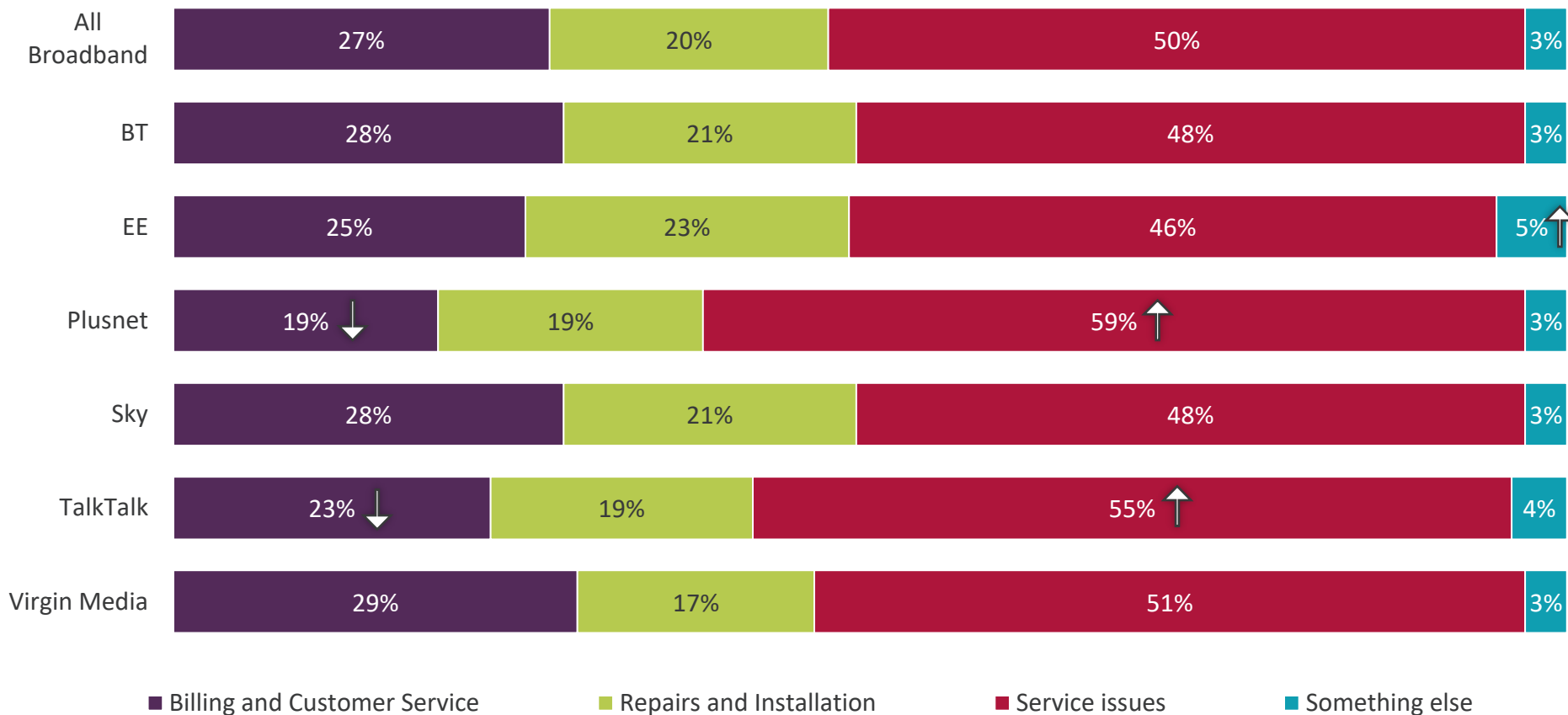
- **A third** (35%) of broadband complaints were resolved on first contact; **Sky** (41%) was more likely to resolve the complaint on first contact, while **TalkTalk** (25%) was less likely to do so on first contact.



Compared to all broadband complaints, TalkTalk and Plusnet had a higher proportion of *service issues* complaints, but a lower proportion of *billing/customer service* complaints. EE had a higher proportion of complaints about *something else* compared to all broadband complaints.

Complaint type

Broadband complaints



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

Q. And thinking of the most recent **complaint** you had to contact [company] about, which one of the following categories did the issue fall into?

Base: All who complained about the broadband service in past 6 months (3396), BT (717), EE (291), Plusnet (266), Sky (720), TalkTalk (598), Virgin Media (804).

↑ ↓ Indicates significantly higher/lower than the sector average at the 95% confidence level.

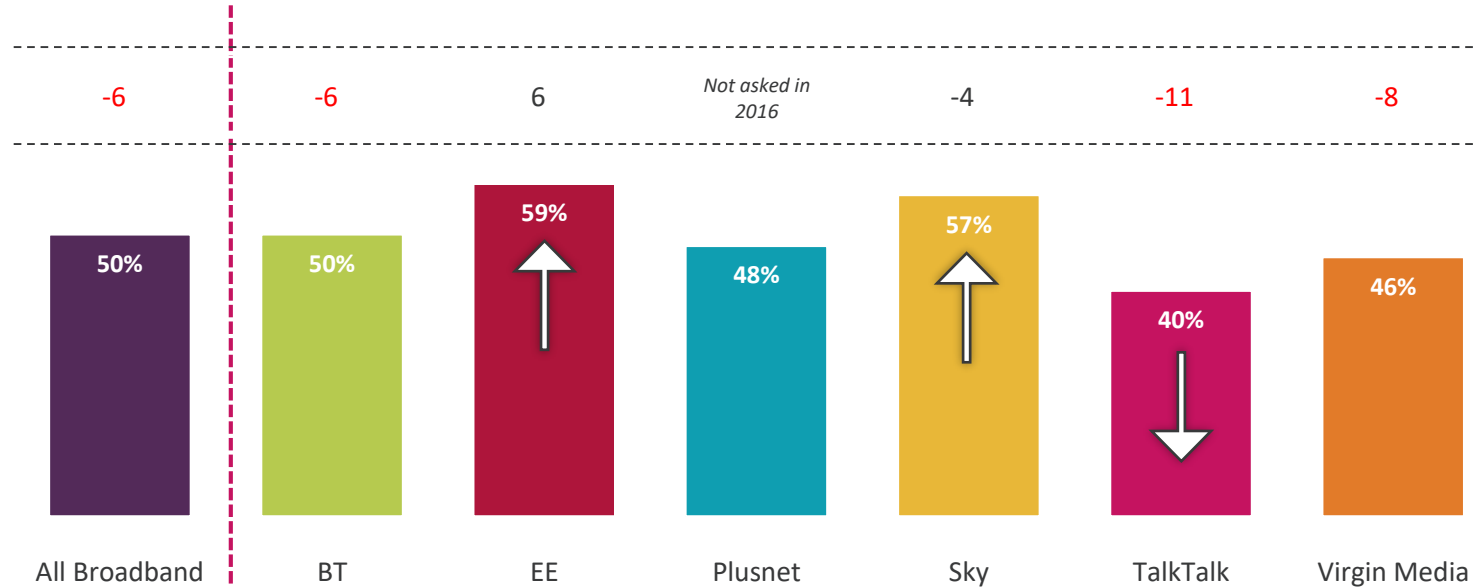
Overall, half of broadband complaints were handled to customers' satisfaction (a decline since 2016); higher for EE and Sky and lower for TalkTalk.



Overall satisfaction with provider's handling of most recent complaint

Broadband complaints % Satisfied (7-10)

% points difference
2017 vs. 2016



◆ YoY = 2017%-2016%	All Broadband		BT		EE		Plusnet		Sky		TalkTalk		Virgin Media	
	2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY
Billing/Customer Service	51%	-1	47%	-1	61%*	1	45%*	N/A	62%	0	49%	8	45%	-7
Repairs/Installation	57%	-5	64%	2	62%*↑	18	59%*	N/A	57%	-12	45%↓	-7	56%	-10
Service Issues	45%	-10	46%	-10	58%*↑	6	45%	N/A	52%*↑	-6	36%*↓	-18	44%	-8

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 broadband service in past 6 months: 2016: All / Billing/Customer Service / Service Issues (3558/797/657/2017), BT (1017/200/227/571), EE (215/62*/52*/95*), Sky (660/165/152/326), TalkTalk (843/149/88*/575), Virgin Media (823/221/138/450). 2017: All / Billing/Customer Service / Service Issues (3396/890/673/1720), BT (717/200/154/342), EE (291/72*/68*/135), Plusnet (266/51*/51*/157), Sky (720/199/150/349), TalkTalk (598/135/112/329), Virgin Media (804/253/138/408).

↑ ↓ Indicates significantly higher/lower than the sector/complaint type average at the 95% confidence level. **Red text** Indicates significantly lower than 2016 at the 95% confidence level.

Green text Indicates significantly higher than 2016 at the 95% confidence level.

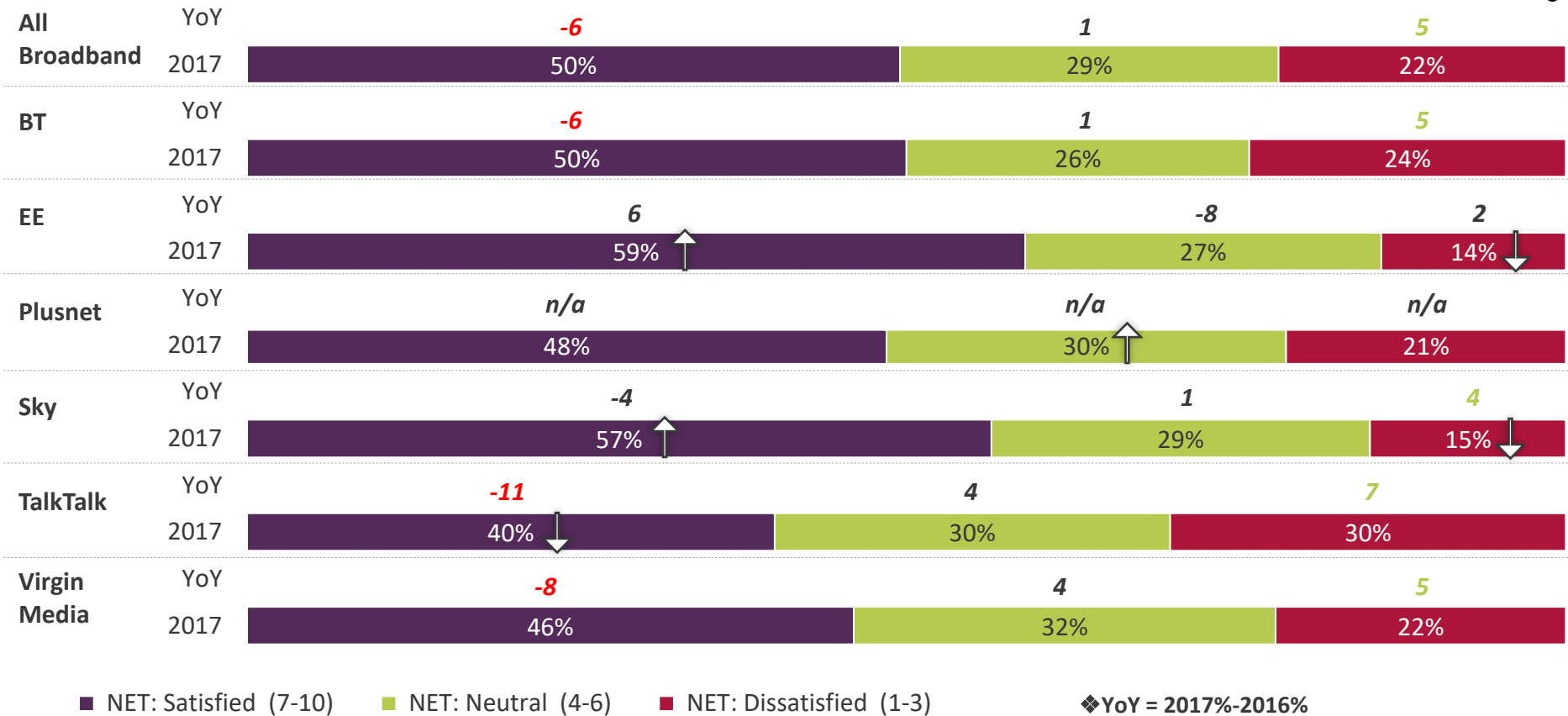
Overall, there was a decrease in satisfaction with complaints handling and an accompanying increase in dissatisfaction compared to 2016.



YoY = 2017%-2016%

Satisfaction shifts

Broadband complaints



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 broadband service in past 6 months (3396), BT (717), EE (291), Plusnet (266), Sky (720), TalkTalk (598), Virgin Media (804).

↑ ↓ Indicates significantly higher/lower than the sector average at the 95% confidence level.
 Red text Indicates significantly lower than 2016 at the 95% confidence level.
 Green text Indicates significantly higher than 2016 at the 95% confidence level.



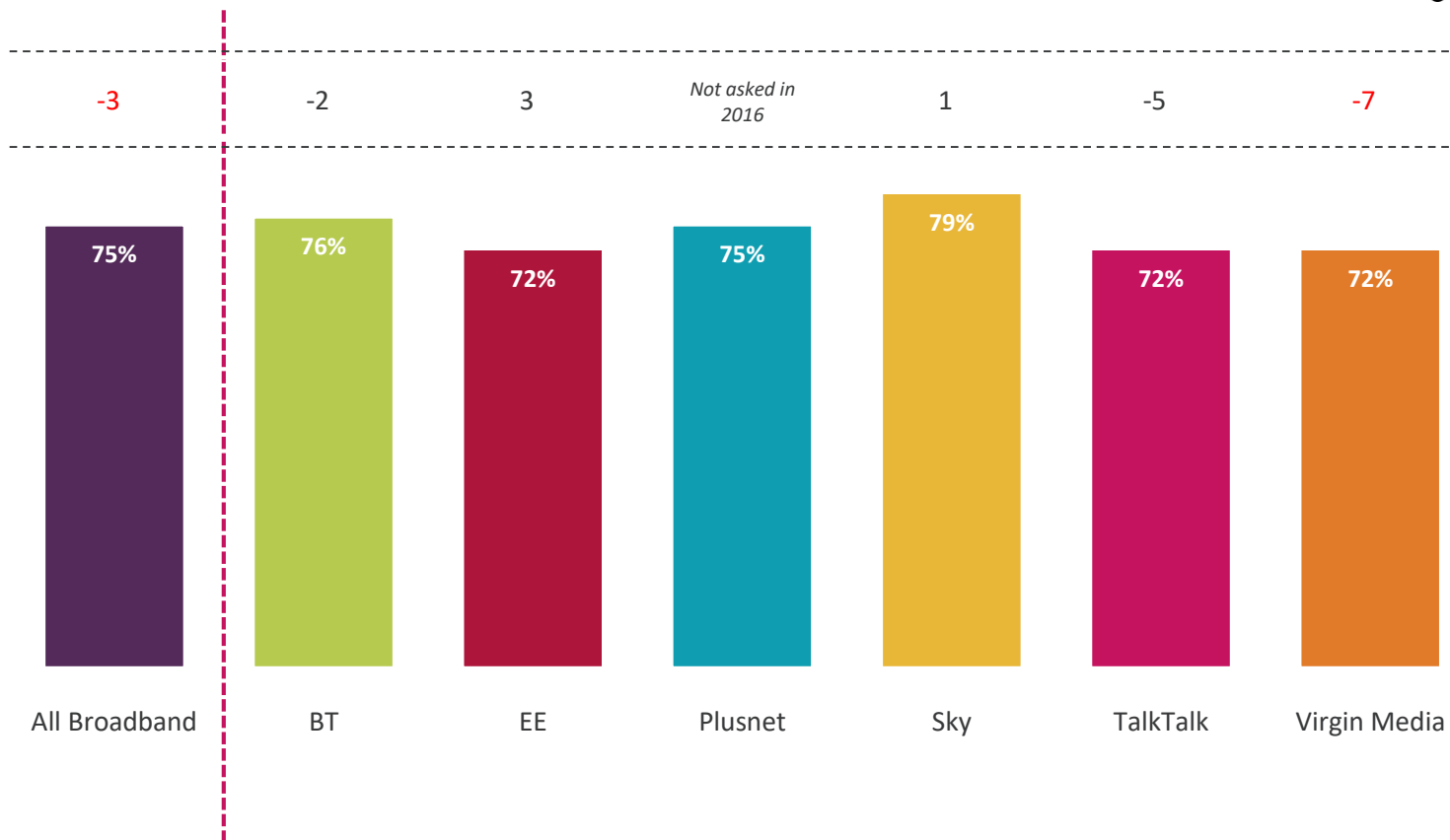
Overall, three in four whose broadband complaint was completely resolved were satisfied with the complaint handling, a decline since 2016. There was no variation by provider.

Overall satisfaction with provider's handling of most recent complaint

Among completely resolved broadband complaints

% Satisfied (7-10)

% points difference
2017 vs. 2016



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 broadband service in past 6 months whose issue was completely resolved: 2016: All (2010), BT (622), EE (114), Sky (361), TalkTalk (466), Virgin Media (447). 2017: All (1655), BT (369), EE (167), Plusnet (126), Sky (382), TalkTalk (220), Virgin Media (391).



Indicates significantly higher/lower than the sector/complaint type average at the 95% confidence level. **Red text** Indicates significantly lower than 2016 at the 95% confidence level.

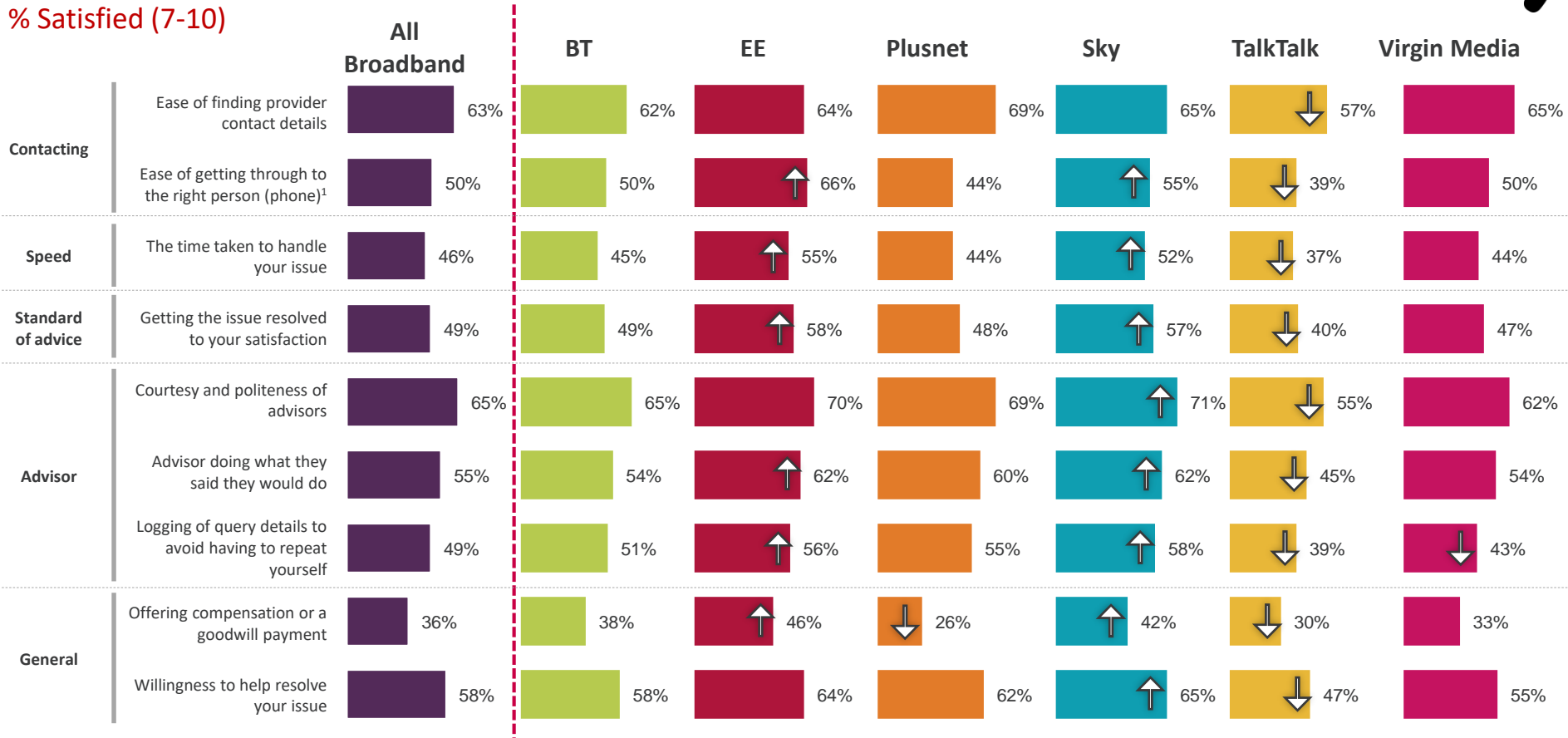
Green text Indicates significantly higher than 2016 at the 95% confidence level.

Sky was above average for satisfaction for eight specific aspects of complaints handling and EE for six. TalkTalk was below average for *all*, and Plusnet and Virgin Media for one.



Satisfaction with specific aspects Broadband complaints – All

% Satisfied (7-10)



Source: Ofcom Quality of customer service – complaints research, online survey, fieldwork carried out by BDRG, 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 broadband service in past 6 months – All (3396), BT (717), EE (291), Plusnet (266), Sky (720), TalkTalk (598), Virgin Media (804).

↑ ↓ Indicates significantly higher/lower than the sector average at the 95% confidence level. * Caution: small base

¹All contacting by phone

(2324/460/186/473/403/618/184)

Compared to 2016, EE had an increase in satisfaction for three specific aspects and BT for one; TalkTalk and Virgin Media both had decreases for seven aspects, BT for four, and Sky for three.



Satisfaction with specific aspects

Broadband complaints – All

YoY=2017%-2016%

% Satisfied (7-10)

		All Broadband		BT		EE		Plusnet		Sky		TalkTalk		Virgin Media	
		2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY
Contacting	Ease of finding provider contact details	63%	1	62%	4	64%	9	69%	N/A	65%	0	57%	-3	65%	-2
	Ease of getting through to the right person (phone) ¹	50%	2	50%	9	66%	20	44%	N/A	55%	-1	39%	-5	50%	-4
Speed	The time taken to handle your issue	46%	-7	45%	-9	55%	5	44%	N/A	52%	-4	37%	-9	44%	-9
Standard of advice	Getting the issue resolved to your satisfaction	49%	-7	49%	-9	58%	5	48%	N/A	57%	-2	40%	-11	47%	-7
Advisor	Courtesy and politeness of advisors	65%	-1	65%	2	70%	12	69%	N/A	71%	-1	55%	-10	62%	-6
	Advisor doing what they said they would do	55%	-5	54%	-3	62%	3	60%	N/A	62%	-6	45%	-11	54%	-7
	Logging of query details to avoid having to repeat yourself	49%	-7	51%	-6	56%	6	55%	N/A	58%	-6	39%	-11	43%	-12
General	Offering compensation or a goodwill payment	36%	-9	38%	-9	46%	2	26%	N/A	42%	-6	30%	-10	33%	-9
	Willingness to help resolve your issue	58%	-3	58%	-2	64%	4	62%	N/A	65%	-3	47%	-10	55%	-5

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 broadband service in past 6 months – All (3396), BT (717), EE (291), Plusnet (266), Sky (720), TalkTalk (598), Virgin Media (804).

Red or Green text indicates significantly lower/higher than 2016 at the 95% confidence level. * Caution: small base

¹All contacting by phone (2324/460/186/473/403/618/184)

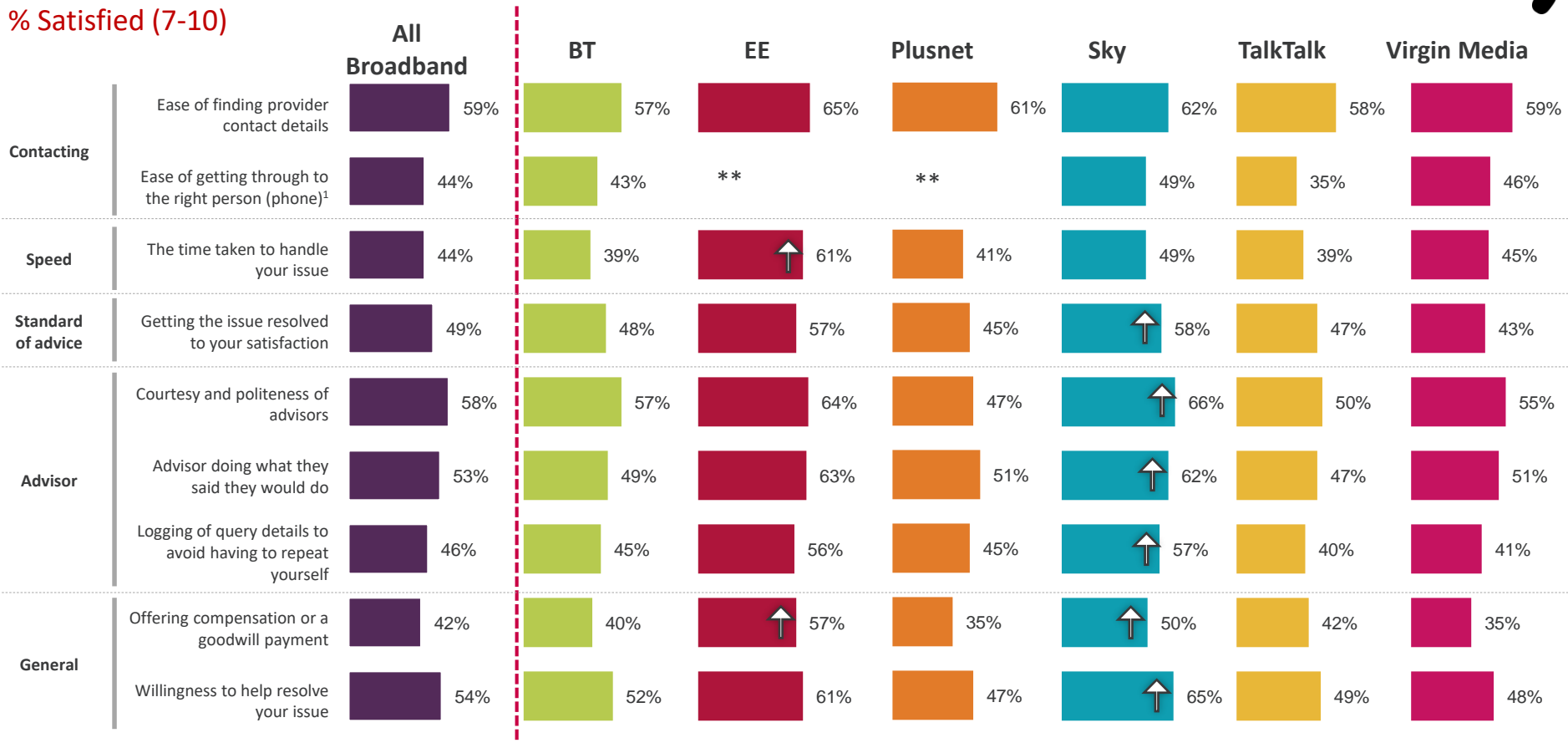
For *billing/customer service* complaints, Sky was above average for satisfaction for six specific aspects of customer service and EE for two.



Satisfaction with specific aspects

Broadband complaints – Billing and Customer Service

% Satisfied (7-10)



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 broadband service in past 6 months – Billing and Customer Service (890), BT (200), EE (72*), Plusnet (51*), Sky (199), TalkTalk (135), Virgin Media (253).

↑ ↓ Indicates significantly higher/lower than the sector average at the 95% confidence level. * Caution: small base **Base too small to chart

¹All contacting by phone (540/117/36**/113/85*/161/28**)



For *billing/customer service* complaints compared to 2016, BT had the only increase in satisfaction from 2016, for one aspect; while Virgin Media had the only decrease, for one aspect.

Satisfaction with specific aspects

Broadband complaints – Billing and Customer Service

YoY=2017%-2016%

% Satisfied (7-10)		All Broadband		BT		EE		Plusnet		Sky		TalkTalk		Virgin Media	
		2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY
Contacting	Ease of finding provider contact details	59%	3	57%	6	65%	13	61%	N/A	62%	0	58%	6	59%	-3
	Ease of getting through to the right person (phone) ¹	44%	1	43%	15	**	N/A	**	N/A	49%	-2	35%	-2	46%	-9
Speed	The time taken to handle your issue	44%	-4	39%	-6	61%	8	41%	N/A	49%	-6	39%	4	45%	-8
Standard of advice	Getting the issue resolved to your satisfaction	49%	-2	48%	0	57%	-4	45%	N/A	58%	0	47%	9	43%	-9
Advisor	Courtesy and politeness of advisors	58%	-4	57%	-5	64%	1	47%	N/A	66%	-1	50%	-2	55%	-8
	Advisor doing what they said they would do	53%	-3	49%	-4	63%	-3	51%	N/A	62%	-2	47%	6	51%	-7
	Logging of query details to avoid having to repeat yourself	46%	-4	45%	-4	56%	-5	45%	N/A	57%	-2	40%	6	41%	-10
General	Offering compensation or a goodwill payment	42%	-1	40%	2	57%	2	35%	N/A	50%	-4	42%	6	35%	-6
	Willingness to help resolve your issue	54%	-3	52%	2	61%	-2	47%	N/A	65%	-3	49%	1	48%	-9

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 broadband service in past 6 months – Billing and Customer Service (890), BT (200), EE (72*), Plusnet (51*), Sky (199), TalkTalk (135), Virgin Media (253).

Red or Green text indicates significantly lower/higher than 2016 at the 95% confidence level. * Caution: small base **Base too small to chart

¹All contacting by phone (540/117/36**/113/85*/161/28**)

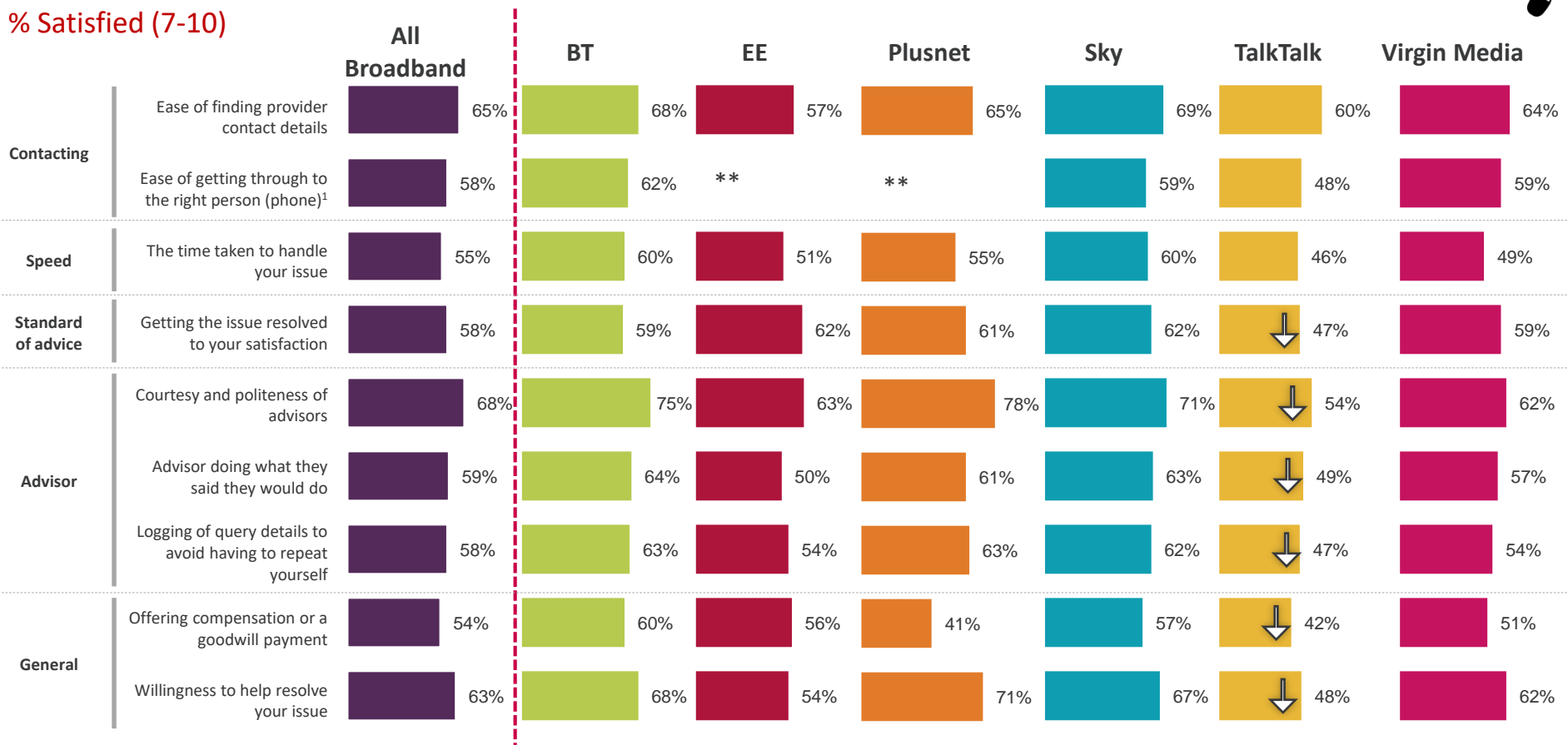
For *repairs/installation* complaints no provider had any above average satisfaction measures. TalkTalk however did have *below* average satisfaction for six specific aspects.



Satisfaction with specific aspects

Broadband complaints – Repairs and Installation

% Satisfied (7-10)



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 broadband service in past 6 months – Repairs and Installation (673), BT (154), EE (68*), Plusnet (51*), Sky (150), TalkTalk (112), Virgin Media (138).

↑ ↓ Indicates significantly higher/lower than the sector average at the 95% confidence level. * Caution: small base **Base too small to chart
¹All contacting by phone (387/100/29**/82*/58*/85*/33**)

For repairs/installation complaints compared to 2016, BT had increases in satisfaction for two specific aspects and EE for one; Virgin Media had decreases for three and Sky for two.



Satisfaction with specific aspects

Broadband complaints – Repairs and Installation

YoY=2017%-2016%

% Satisfied (7-10)

		All Broadband		BT		EE		Plusnet		Sky		TalkTalk		Virgin Media	
		2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY
Contacting	Ease of finding provider contact details	65%	1	68%	9	57%	13	65%	N/A	69%	-3	60%	5	64%	-10
	Ease of getting through to the right person (phone) ¹	58%	11	62%	26	**	N/A	**	N/A	59%	-5	48%	3	59%	10
Speed	The time taken to handle your issue	55%	-4	60%	3	51%	1	55%	N/A	60%	-6	46%	2	49%	-15
Standard of advice	Getting the issue resolved to your satisfaction	58%	-5	59%	-3	62%	12	61%	N/A	62%	-10	47%	0	59%	-8
Advisor	Courtesy and politeness of advisors	68%	2	75%	11	63%	21	78%	N/A	71%	-3	54%	-5	62%	-12
	Advisor doing what they said they would do	59%	-3	64%	5	50%	0	61%	N/A	63%	-7	49%	-4	57%	-9
	Logging of query details to avoid having to repeat yourself	58%	-3	63%	5	54%	10	63%	N/A	62%	-11	47%	-1	54%	-10
General	Offering compensation or a goodwill payment	54%	-5	60%	4	56%	8	41%	N/A	57%	-12	42%	-3	51%	-11
	Willingness to help resolve your issue	63%	-3	68%	6	54%	2	71%	N/A	67%	-6	48%	-10	62%	-20

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 broadband service in past 6 months – Repairs and Installation (673), BT (154), EE (68*), Plusnet (51*), Sky (150), TalkTalk (112), Virgin Media (138).

Red or Green text indicates significantly lower/higher than 2016 at the 95% confidence level. * Caution: small base **Base too small to chart

¹All contacting by phone (387/100/29**/82*/58*/85*/33**)

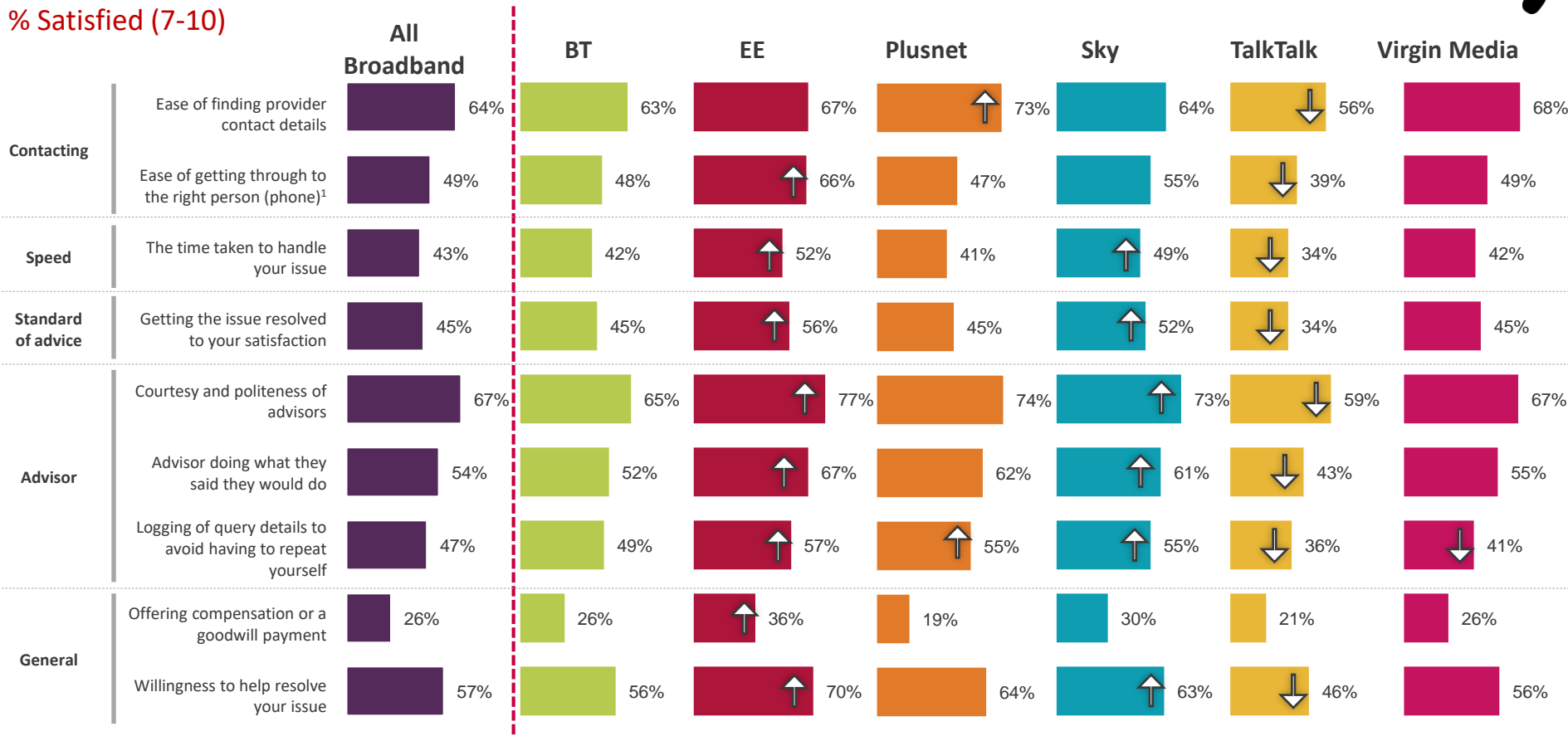
For *service issues* complaints EE was above average for eight specific aspects, Sky for six and Plusnet for two; TalkTalk was below average for eight and Virgin Media for one.



Satisfaction with specific aspects

Broadband complaints – Service Issues

% Satisfied (7-10)



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 broadband service in past 6 months – Service Issues (1720), BT (342), EE (135), Plusnet (157), Sky (349), TalkTalk (329), Virgin Media (408).

↑ ↓ Indicates significantly higher/lower than the sector average at the 95% confidence level. * Caution: small base **Base too small to chart

¹All contacting by phone (1320/232/109/265/246/351/118)



For *service issues* complaints compared to 2016, EE had increases in satisfaction for two specific aspects; TalkTalk had decreases for seven, BT for five, Virgin Media for three and Sky for one.

Satisfaction with specific aspects

Broadband complaints – Service Issues

YoY=2017%-2016%

% Satisfied (7-10)		All Broadband		BT		EE		Plusnet		Sky		TalkTalk		Virgin Media	
		2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY
Contacting	Ease of finding provider contact details	64%	1	63%	2	67%	4	73%	N/A	64%	1	56%	-6	68%	1
	Ease of getting through to the right person (phone) ¹	49%	0	48%	3	66%	18	47%	N/A	55%	-1	39%	-5	49%	-5
Speed	The time taken to handle your issue	43%	-9	42%	-15	52%	3	41%	N/A	49%	-3	34%	-15	42%	-7
Standard of advice	Getting the issue resolved to your satisfaction	45%	-10	45%	-14	56%	5	45%	N/A	52%	-3	34%	-20	45%	-6
Advisor	Courtesy and politeness of advisors	67%	0	65%	2	77%	13	74%	N/A	73%	-1	59%	-9	67%	-1
	Advisor doing what they said they would do	54%	-7	52%	-5	67%	6	62%	N/A	61%	-9	43%	-17	55%	-5
	Logging of query details to avoid having to repeat yourself	47%	-10	49%	-10	57%	9	55%	N/A	55%	-7	36%	-18	41%	-13
General	Offering compensation or a goodwill payment	26%	-15	26%	-21	36%	-1	19	N/A	30%	-7	21	-20	26%	-9
	Willingness to help resolve your issue	57%	-5	56%	-7	70%	8	64%	N/A	63%	-3	46%	-14	56%	-2

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 broadband service in past 6 months – Service Issues (1720), BT (342), EE (135), Plusnet (157), Sky (349), TalkTalk (329), Virgin Media (408).

Red or Green text indicates significantly lower/higher than 2016 at the 95% confidence level. * Caution: small base **Base too small to chart

¹All contacting by phone (1320/232/109/265/246/351/118)

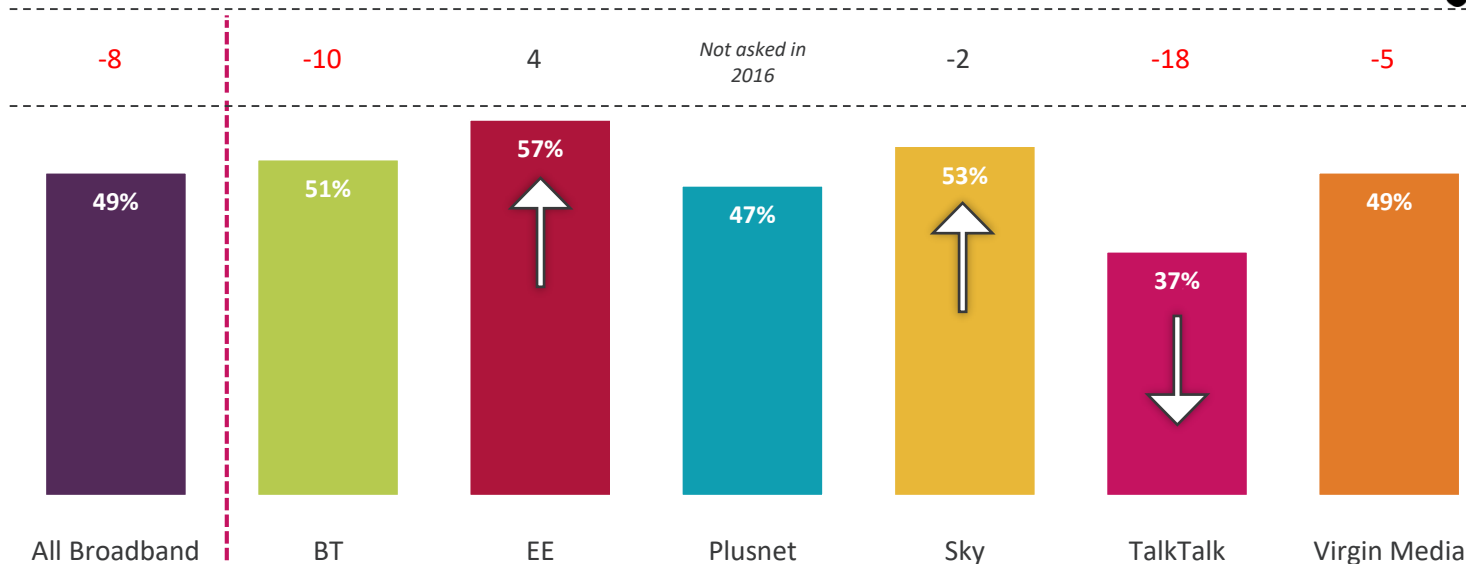


Overall, half of broadband complaints were completely resolved (a decline since 2016); the proportion was higher for EE and Sky and lower for TalkTalk.

Proportion whose most recent complaint was completely resolved

Broadband complaints % Completely Resolved

% points difference
2017 vs. 2016



◆ YoY = 2017%-2016%	2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY
Billing/ Customer Service	50%	-3	53%	-1	60%	4	47%	N/A	55%	2	45%	-1	45%	-8
Repairs/ Installation	62%	-4	68%	-2	71%	23	69%	N/A	65%	0	45%	-15	58%	10
Service Issues	42%	-14	43%	-18	49%	-6	39%	N/A	45%	-5	31%	-26	47%	-4

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? Base: All who complained about the broadband service in past 6 months: 2016: All / Billing/Customer Service / Service Issues (3558/797/657/2017), BT (1017/200/227/571), EE (215/62*/52*/95*), Sky (660/165/152/326), TalkTalk (843/149/88*/575), Virgin Media (823/221/138/450). 2017: All / Billing/Customer Service / Service Issues (3396/890/673/1720), BT (717/200/154/342), EE (291/72*/68*/135), Plusnet (266/51*/51*/157), Sky (720/199/150/349), TalkTalk (598/135/112/329), Virgin Media (804/253/138/408).



Indicates significantly higher/lower than the sector/complaint type average at the 95% confidence level. **Red text** Indicates significantly lower than 2016 at the 95% confidence level.

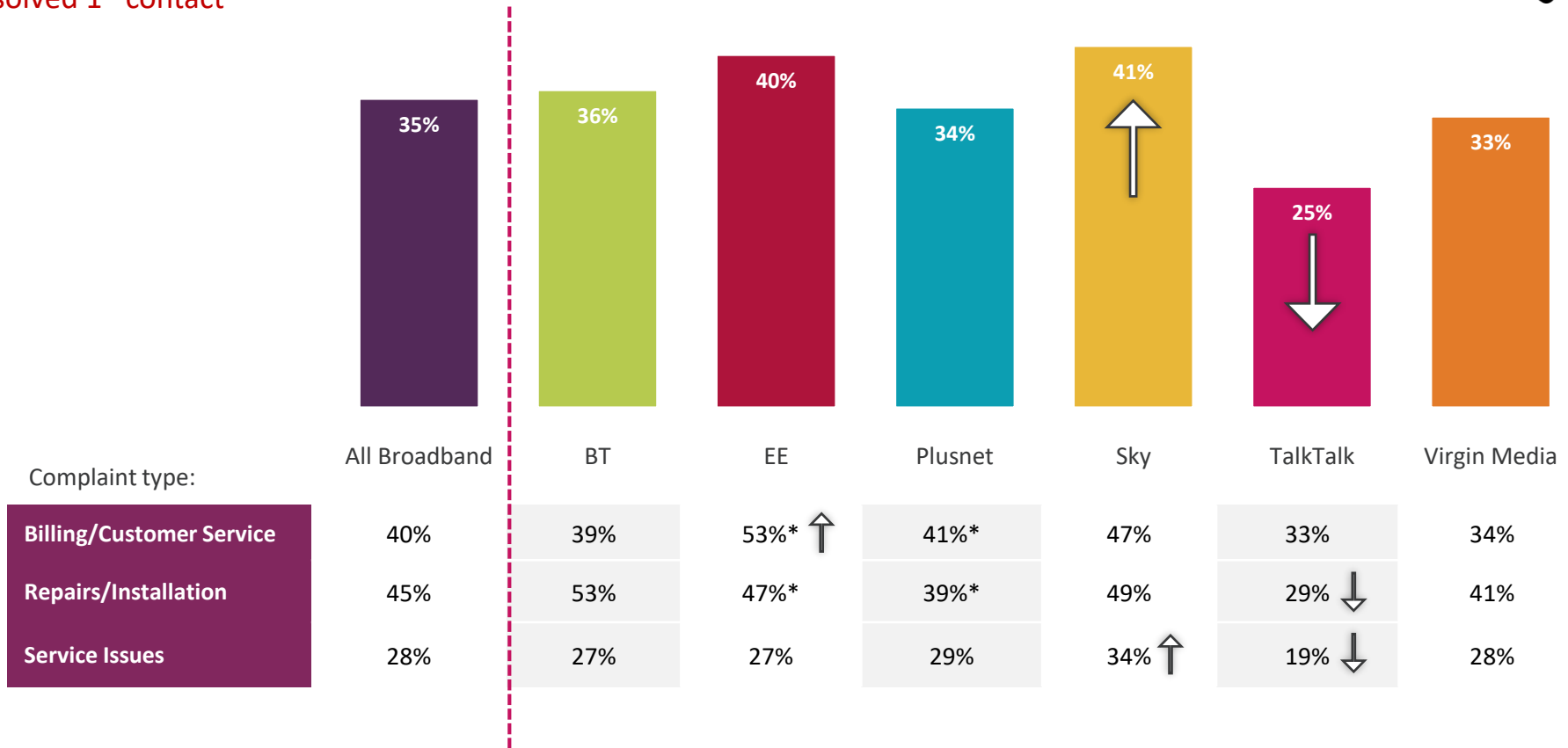
Green text Indicates significantly higher than 2016 at the 95% confidence level

Overall, a third of broadband complaints were completely resolved on first contact; the proportion was higher for Sky and lower for TalkTalk.



Proportion where complaint was resolved on first contact

Broadband complaints % resolved 1st contact



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

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 broadband service in past 6 months: 2017: All / Billing/Customer Service / Service Issues (3396/890/673/1720), BT (717/200/154/342), EE (291/72*/68*/135), Plusnet (266/51*/51*/157), Sky (720/199/ 150/349), TalkTalk (598/135/112/329), Virgin Media (804/253/138/408). *LOW BASE <100

↑ ↓ Indicates significantly higher/lower than the sector/complaint type average at the 95% confidence level.

Landline complaints

Executive summary – landline (1)

High level summary:

Overall satisfaction

- **More than half** (53%) of landline customers who contacted their provider with a complaint were satisfied with how the complaint was handled, a decline since 2016 (62%). Overall satisfaction with complaint handling was higher for **Sky** (58%) and lower for **TalkTalk** (44%).
 - Compared to 2016 **TalkTalk**, **Sky** and **BT** all saw declines in overall satisfaction.

Satisfaction among completely resolved

- **Three in four** (73%) customers whose complaint was completely resolved were satisfied with complaint handling, there was no variation by provider.
 - Compared to 2016 there were declines for **TalkTalk** and **BT**.

Completely resolved

- **Over half** (57%) of landline complaints were completely resolved, a decline since 2016 (66%). **TalkTalk** (47%) resolved a lower proportion.
 - Compared to 2016 **TalkTalk** and **BT** both saw declines in the proportion of complaints that were completely resolved.

Executive summary – landline (2)

High level summary:

Satisfaction by complaint type

- Satisfaction with *repairs and installation* and *service issues* complaints was lower than average for **TalkTalk**.
 - Compared to 2016, **TalkTalk** and **BT** both declined for *service issues* complaints, while **Virgin Media** declined for *billing/customer service* complaints.

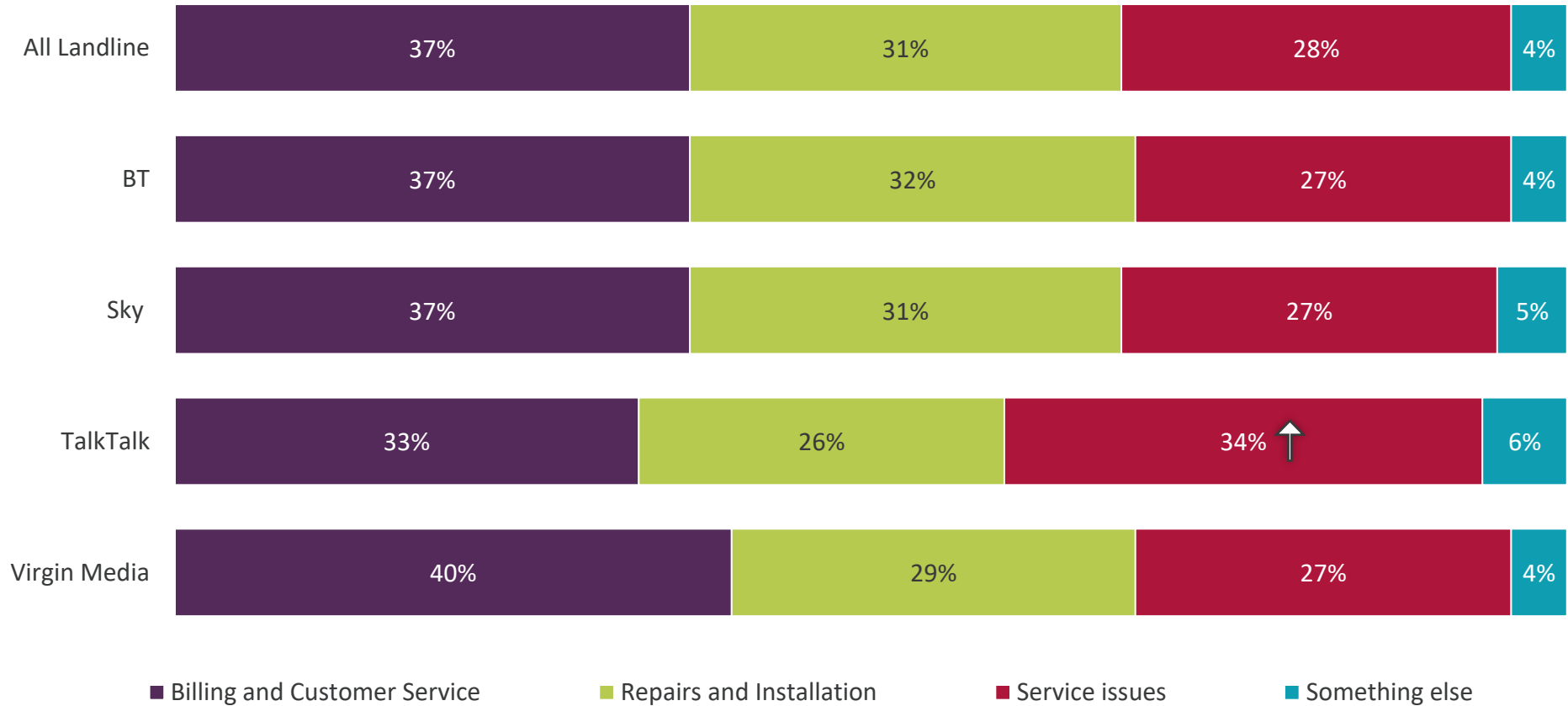
Resolved on first contact

- **Nearly half** (45%) of landline complaints were resolved on first contact; **TalkTalk** (34%) was less likely to do so on first contact.

TalkTalk had a higher proportion of *service issues* complaints compared to all landline complaints. There was no other variation in type of complaint by provider.



Complaint type
Landline complaints



Source: Ofcom Quality of customer service – complaints research, online survey, fieldwork carried out by BDRC, December 2017/January 2018
 Q. And thinking of the most recent complaint you had to contact [company] about, which one of the following categories did the issue fall into?
 Base: All who complained about the landline service in past 6 months (2002), BT (579), Sky (500), TalkTalk (420), Virgin Media (503).

↑ ↓ Indicates significantly higher/lower than the sector average at the 95% confidence level.

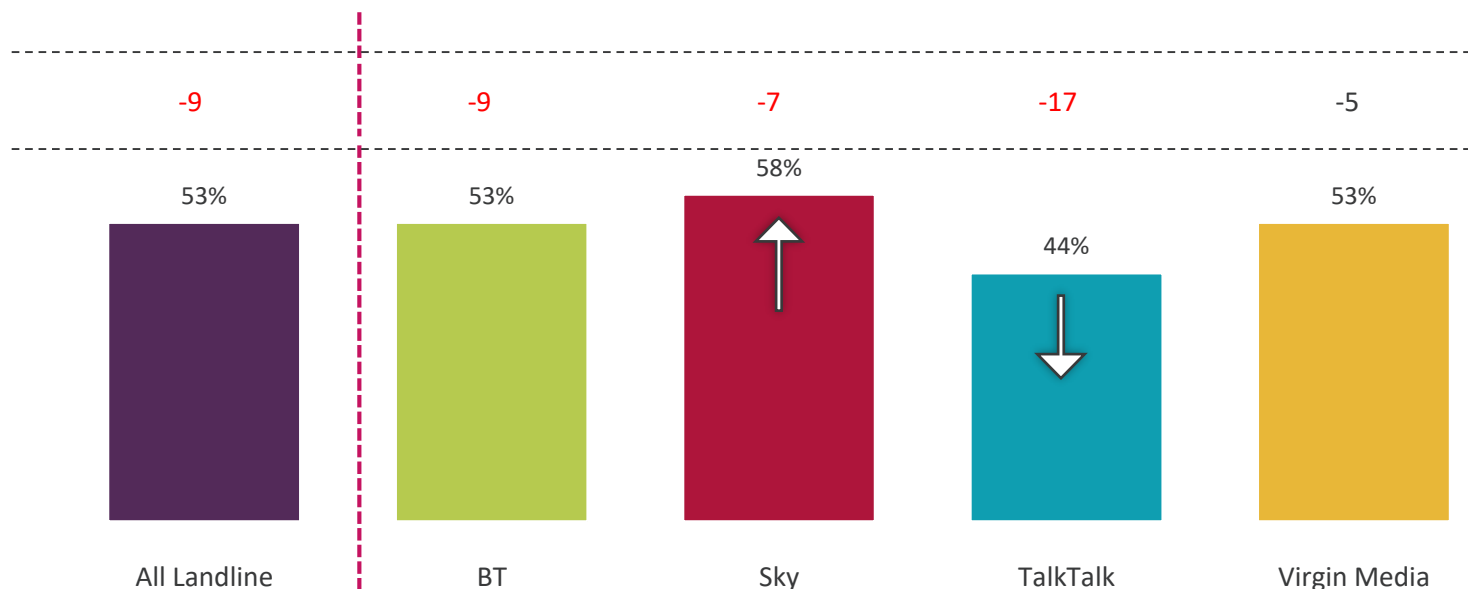


Overall, more than half of landline complaints were handled to customers' satisfaction (a decline since 2016); higher for Sky and lower for TalkTalk.

Overall satisfaction with provider's handling of most recent complaint

Landline complaints % Satisfied (7-10)

% points difference
2017 vs. 2016



❖ YoY = 2017% - 2016%

	2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY
Billing/Customer Service	50%	-4	48%	-3	55%	-8	51%	6	46%	-11
Repairs/Installation	57%	-9	58%	-7	61%	-8	42% ↓	-11	61%	-10
Service Issues	52%	-14	54%	-14	57%	-7	35% ↓	-36	54%	4

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 landline service in past 6 months: 2016: All / Billing/Customer Service / Service Issues (2468/840/593/944), BT (925/285/244/367), Sky (489/188/162/120), TalkTalk (537/143/70*/302), Virgin Media (517/224/117/155). 2017: All / Billing/Customer Service / Service Issues (2002/737/600/573), BT (579/215/185/157), Sky (500/184/156/136), TalkTalk (420/138/111/144), Virgin Media (503/200/148/136).

↑ ↓ Indicates significantly higher/lower than the sector/complaint type average at the 95% confidence level. **Red text** Indicates significantly lower than 2016 at the 95% confidence level.

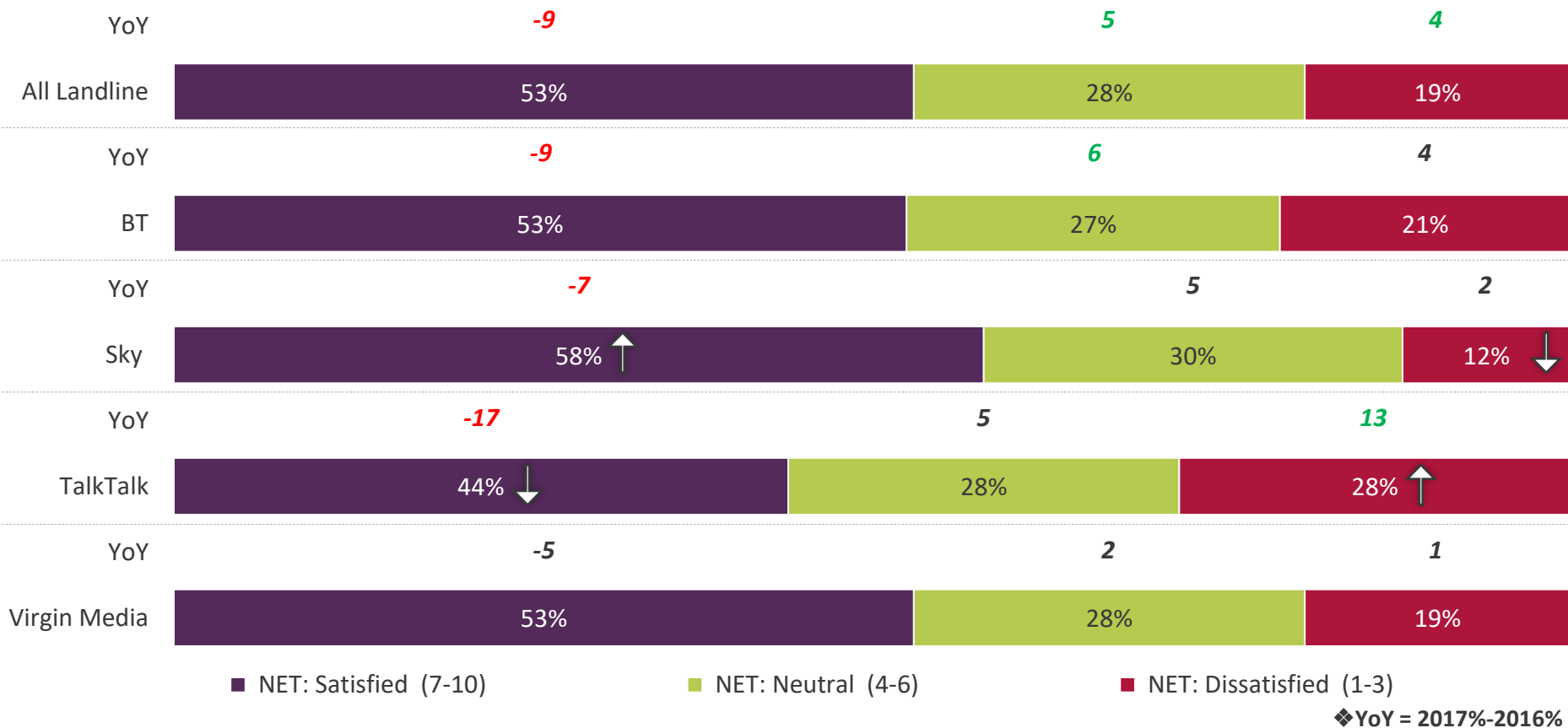
Green text Indicates significantly higher than 2016 at the 95% confidence level



Overall and for all providers apart from Virgin Media, satisfaction declined from 2016. For all landline complaints, this was a shift to both being neutral and dissatisfied, while for BT the decrease in satisfaction was mostly to being neutral and for TalkTalk the shift was largely to dissatisfaction.

Satisfaction shifts

Landline complaints



Source: Ofcom Quality of customer service – complaints research, online survey, fieldwork carried out by BDRG, 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 landline service in past 6 months (2016), BT (579), Sky (500), TalkTalk (420), Virgin Media (503).

↑ ↓ Indicates significantly higher/lower than the sector/complaint type average at the 95% confidence level. Red text Indicates significantly lower than 2016 at the 95% confidence level.

Green text Indicates significantly higher than 2016 at the 95% confidence level



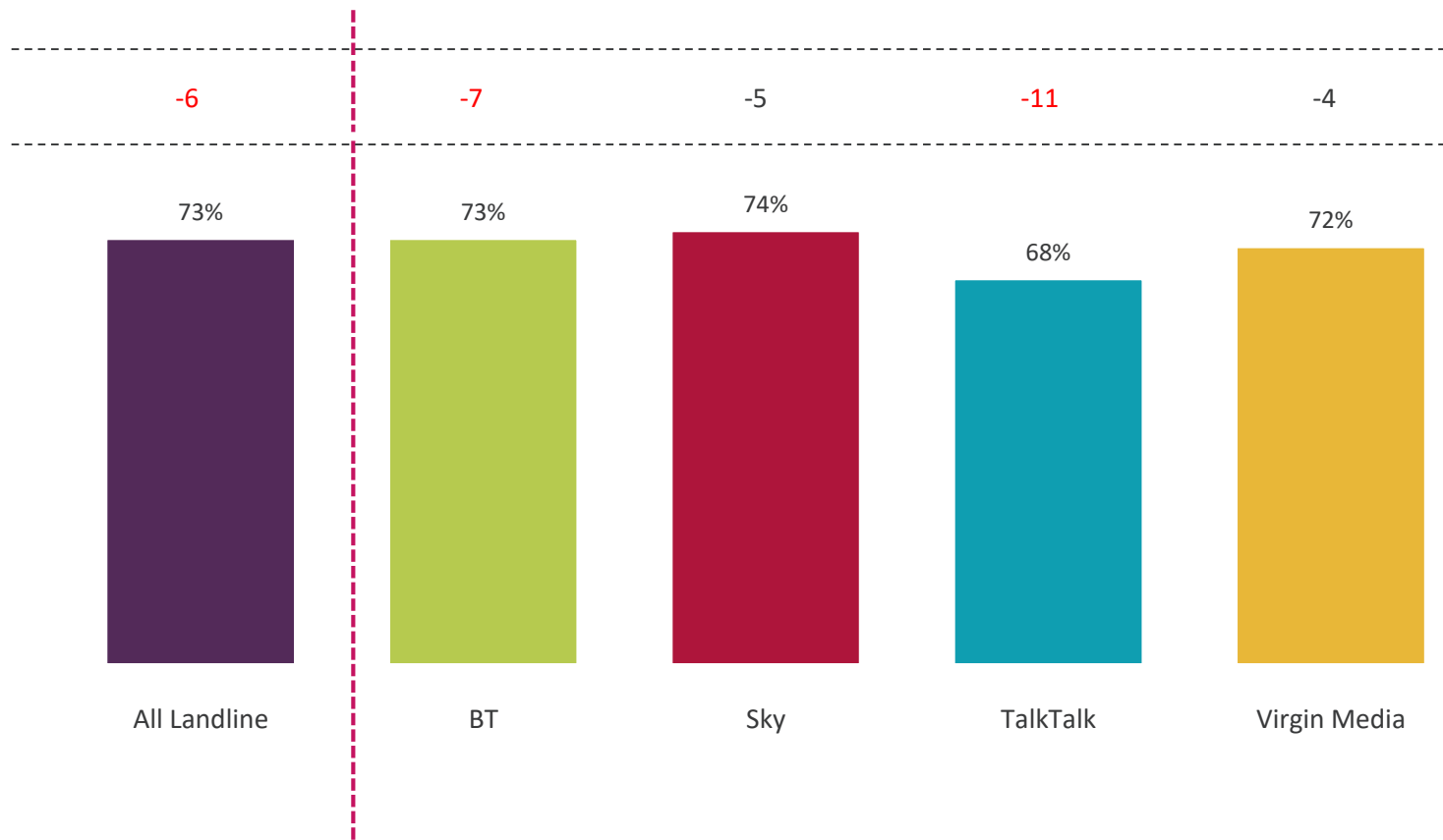
Overall, three in four whose landline complaint was completely resolved were satisfied with the complaint handling, a decline since 2016. There was no variation by provider.

Overall satisfaction with provider's handling of most recent complaint

Among completely resolved landline complaints

% Satisfied (7-10)

% points difference
2017 vs. 2016



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 landline service in past 6 months whose issue was completely resolved: 2016: All (1583), BT (606), Sky (293), TalkTalk (378), Virgin Media (306). 2017: All (1109), BT (348), Sky (283), TalkTalk (198), Virgin Media (280).

↑↓ Indicates significantly higher/lower than the sector/complaint type average at the 95% confidence level. **Red text** Indicates significantly lower than 2016 at the 95% confidence level. **Green text** Indicates significantly higher than 2016 at the 95% confidence level

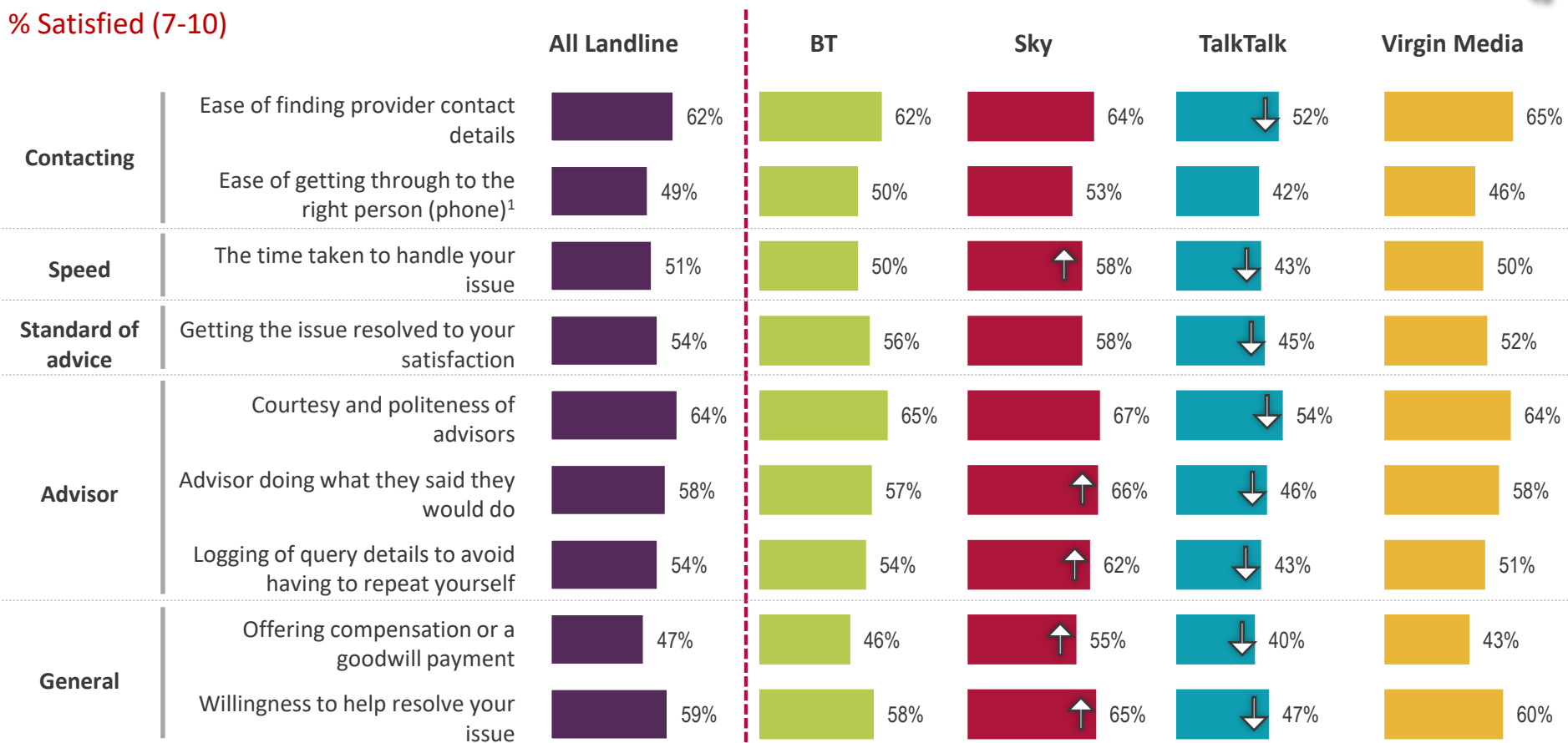


Sky was above average for satisfaction for five specific aspects of complaints handling. TalkTalk was below average for eight.

Satisfaction with specific aspects

Landline complaints – All

% Satisfied (7-10)



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 landline service in past 6 months – All (2002), BT (579), Sky (500), TalkTalk (420), Virgin Media (503).

↑↓ Indicates significantly higher/lower than the sector average at the 95% confidence level. * Caution: small base

¹All contacting by phone (1119/329/220/242/328)



Compared to 2016, no provider had increases in satisfaction for any specific aspects of complaints handling; TalkTalk had decreases for seven, BT for five, Virgin Media for three and Sky for one.

Satisfaction with specific aspects

Landline complaints – All

% Satisfied (7-10)

YoY=2017%-2016%

		All Landline		BT		Sky		TalkTalk		Virgin Media	
		2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY
Contacting	Ease of finding provider contact details	62%	3	62%	3	64%	-1	52%	-9	65%	-1
	Ease of getting through to the right person (phone) ¹	49%	1	50%	5	53%	-7	42%	-2	46%	-6
Speed	The time taken to handle your issue	51%	-8	50%	-9	58%	-6	43%	-14	50%	-9
Standard of advice	Getting the issue resolved to your satisfaction	54%	-11	56%	-9	58%	-5	45%	-16	52%	-9
Advisor	Courtesy and politeness of advisors	64%	0	65%	1	67%	-4	54%	-10	64%	-5
	Advisor doing what they said they would do	58%	-3	57%	-4	66%	-2	46%	-15	58%	-4
	Logging of query details to avoid having to repeat yourself	54%	-6	54%	-6	62%	-3	43%	-15	51%	-12
General	Offering compensation or a goodwill payment	47%	-5	46%	-6	55%	-3	40%	-15	43%	-11
	Willingness to help resolve your issue	59%	-6	58%	-7	65%	-2	47%	-19	60%	-5

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 landline service in past 6 months – All (2002), BT (579), Sky (500), TalkTalk (420), Virgin Media (503).

Red or Green text indicates significantly lower/higher than 2016 at the 95% confidence level. * Caution: small base

¹All contacting by phone (1119/329/220/242/328)

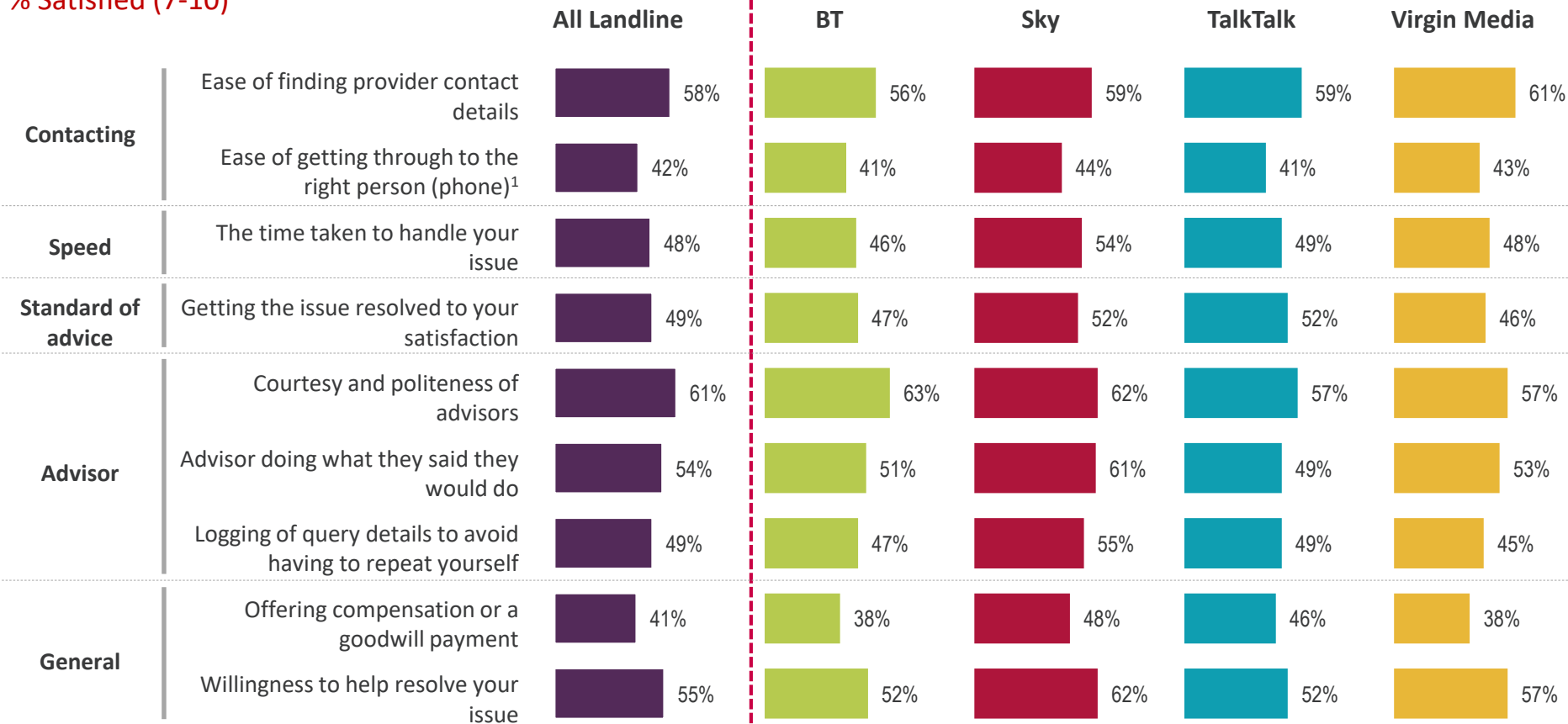


For *billing/customer service* complaints, no provider was above or below average for any specific aspect of complaints handling.

Satisfaction with specific aspects

Landline complaints – Billing and Customer Service

% Satisfied (7-10)



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 landline service in past 6 months – Billing and Customer Service (737), BT (215), Sky (184), TalkTalk (138), Virgin Media (200).

↑↓ Indicates significantly higher/lower than the sector average at the 95% confidence level. * Caution: small base

¹All contacting by phone (429/122/90*/81*/136)



For *billing/customer service* complaints compared to 2016, no provider had increases for satisfaction for any specific aspects of complaints handling; Virgin Media had decreases for six and Sky for one.

Satisfaction with specific aspects

Landline complaints – Billing and Customer Service

% Satisfied (7-10)

YoY=2017%-2016%

		All Landline		BT		Sky		TalkTalk		Virgin Media	
		2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY
Contacting	Ease of finding provider contact details	58%	1	56%	4	59%	-4	59%	2	61%	-3
	Ease of getting through to the right person (phone) ¹	42%	-4	41%	3	44%	-9	41%	-4	43%	-12
Speed	The time taken to handle your issue	48%	-4	46%	-1	54%	-10	49%	8	48%	-8
Standard of advice	Getting the issue resolved to your satisfaction	49%	-6	47%	-7	52%	-9	52%	9	46%	-11
Advisor	Courtesy and politeness of advisors	61%	-3	63%	4	62%	-9	57%	-5	57%	-11
	Advisor doing what they said they would do	54%	-5	51%	-3	61%	-8	49%	-4	53%	-10
	Logging of query details to avoid having to repeat yourself	49%	-4	47%	-1	55%	-9	49%	6	45%	-11
General	Offering compensation or a goodwill payment	41%	-3	38%	1	48%	-8	46%	8	38%	-12
	Willingness to help resolve your issue	55%	-3	52%	-1	62%	-3	52%	-3	57%	-6

Source: Ofcom Quality of customer service – complaints research, online survey, fieldwork carried out by BDRG, 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 landline service in past 6 months – Billing and Customer Service (737), BT (215), Sky (184), TalkTalk (138), Virgin Media (200).

Red or Green text indicates significantly lower/higher than 2016 at the 95% confidence level. * Caution: small base

¹All contacting by phone (429/122/90*/81*/136)

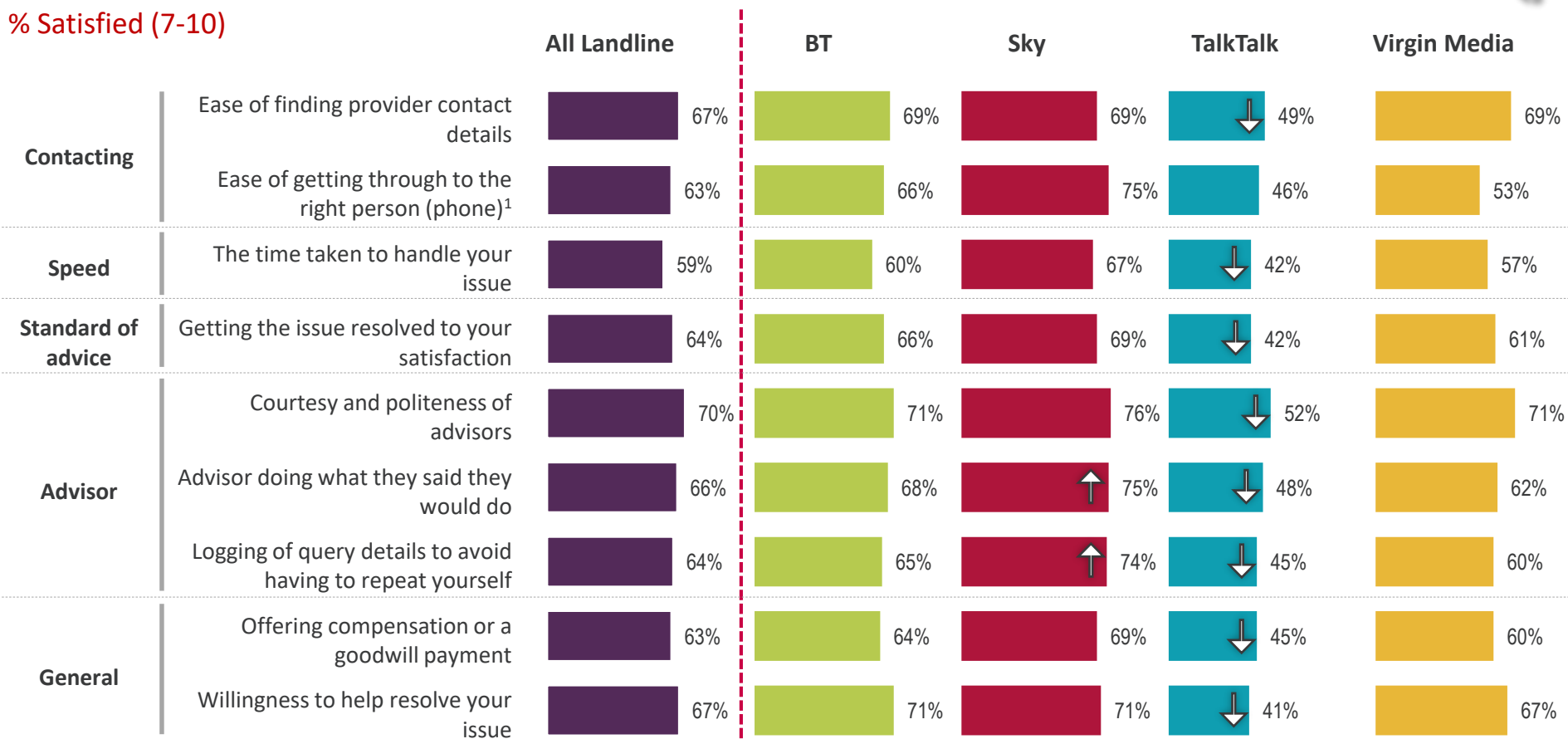
For repairs/installation complaints, Sky was above average for satisfaction for two specific aspects of complaints handling; TalkTalk was below average for eight specific aspects.



Satisfaction with specific aspects

Landline complaints – Repairs and Installation

% Satisfied (7-10)



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 landline service in past 6 months – Repairs and Installation (600), BT (185), Sky (156), TalkTalk (111), Virgin Media (148).

↑↓ Indicates significantly higher/lower than the sector average at the 95% confidence level. * Caution: small base

¹All contacting by phone (273/100/51*/50*/72*)



For *repairs/installation* complaints compared to 2016, BT had an increase in satisfaction for one specific aspect of complaints handling; while Virgin Media had a decrease for two specific aspects and TalkTalk for one.

Satisfaction with specific aspects

Landline complaints – Repairs and Installation

% Satisfied (7-10)

YoY=2017%-2016%

		All Landline		BT		Sky		TalkTalk		Virgin Media	
		2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY
Contacting	Ease of finding provider contact details	67%	2	69%	6	69%	0	49%	-2	69%	-4
	Ease of getting through to the right person (phone) ¹	63%	13	66%	24	75%	5	46%	**	53%	3
Speed	The time taken to handle your issue	59%	-4	60%	-1	67%	-2	42%	-2	57%	-14
Standard of advice	Getting the issue resolved to your satisfaction	64%	0	66%	4	69%	-3	42%	-5	61%	-11
Advisor	Courtesy and politeness of advisors	70%	1	71%	1	76%	6	52%	3	71%	-4
	Advisor doing what they said they would do	66%	0	68%	2	75%	6	48%	-6	62%	-9
	Logging of query details to avoid having to repeat yourself	64%	0	65%	4	74%	4	45%	-4	60%	-14
General	Offering compensation or a goodwill payment	63%	2	64%	6	69%	0	45%	-8	60%	-6
	Willingness to help resolve your issue	67%	0	71%	4	71%	1	41%	-18	67%	-3

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 landline service in past 6 months – Repairs and Installation (600), BT (185), Sky (156), TalkTalk (111), Virgin Media (148).

Red or Green text indicates significantly lower/higher than 2016 at the 95% confidence level. * Caution: small base

¹All contacting by phone (273/100/51*/50*/72*)

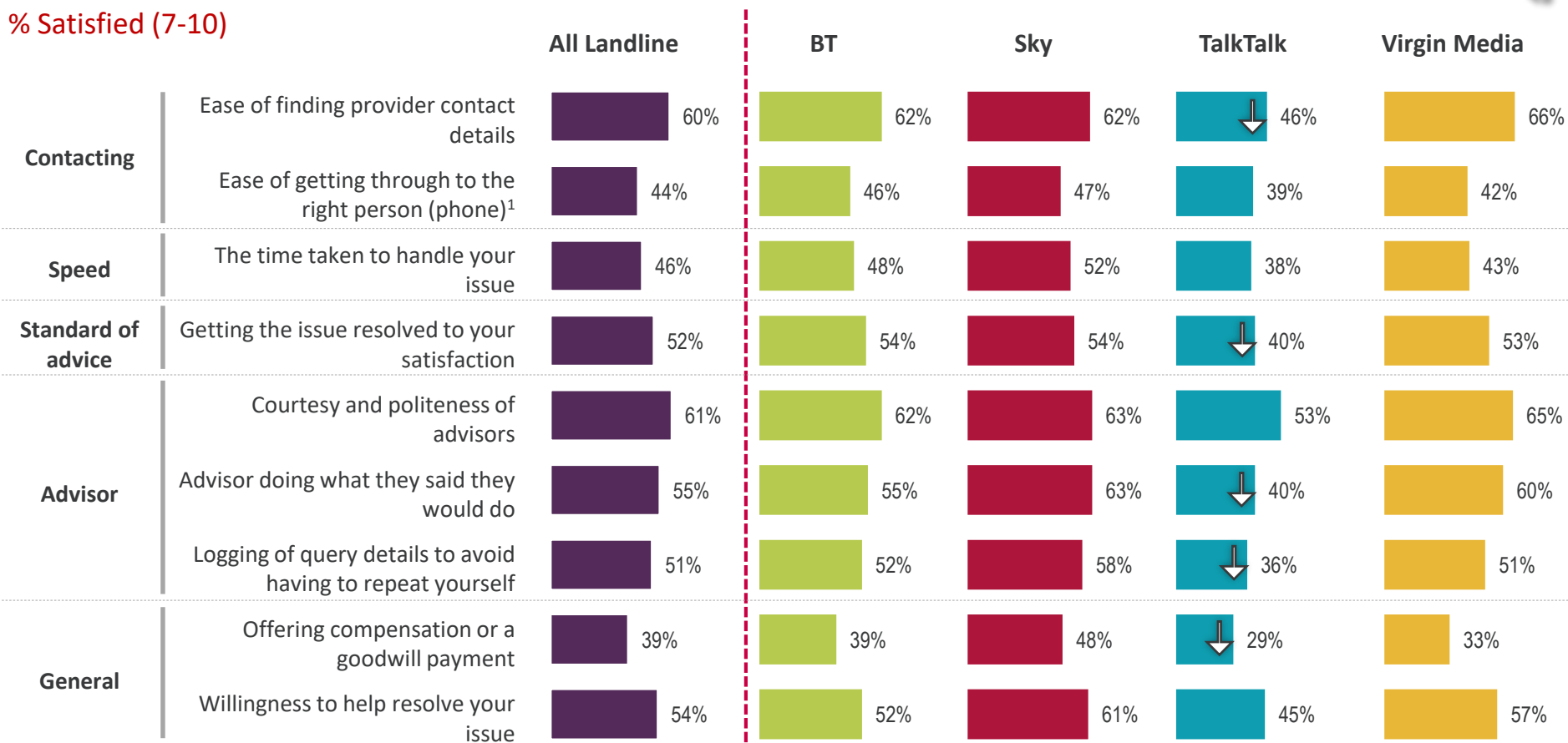
For *service issues* complaints, no provider was above average for satisfaction for any specific aspects of complaints handling; TalkTalk was below average for five specific aspects.



Satisfaction with specific aspects

Landline complaints – Service Issues

% Satisfied (7-10)



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 landline service in past 6 months – Service Issues (573), BT (157), Sky (136), TalkTalk (144), Virgin Media (136).

↑ ↓ Indicates significantly higher/lower than the sector average at the 95% confidence level. * Caution: small base

¹All contacting by phone (355/95*/62*/95*/103)



For *service issues* complaints compared to 2016, no provider had increases for satisfaction for any specific aspects of complaints handling; TalkTalk had decreases for eight specific aspects, BT for five and Virgin Media for two.

Satisfaction with specific aspects

Landline complaints – Service Issues

% Satisfied (7-10)

YoY=2017%-2016%

		All Landline		BT		Sky		TalkTalk		Virgin Media	
		2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY
Contacting	Ease of finding provider contact details	60%	-4	62%	-2	62%	-2	46%	-20	66%	3
	Ease of getting through to the right person (phone) ¹	44%	-5	46%	-4	47%	-12	39%	-3	42%	-4
Speed	The time taken to handle your issue	46%	-19	48%	-20	52%	-5	38%	-29	43%	-11
Standard of advice	Getting the issue resolved to your satisfaction	52%	-18	54%	-20	54%	-5	40%	-33	53%	-6
Advisor	Courtesy and politeness of advisors	61%	-6	62%	-3	63%	-10	53%	-14	65%	-2
	Advisor doing what they said they would do	55%	-9	55%	-9	63%	-5	40%	-26	60%	5
	Logging of query details to avoid having to repeat yourself	51%	-16	52%	-17	58%	-3	36%	-32	51%	-14
General	Offering compensation or a goodwill payment	39%	-21	39%	-23	48%	1	29%	-37	33%	-19
	Willingness to help resolve your issue	54%	-18	52%	-21	61%	-4	45%	-30	57%	-11

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 landline service in past 6 months – Service Issues (573), BT (157), Sky (136), TalkTalk (144), Virgin Media (136).

Red or Green text indicates significantly lower/higher than 2016 at the 95% confidence level. * Caution: small base

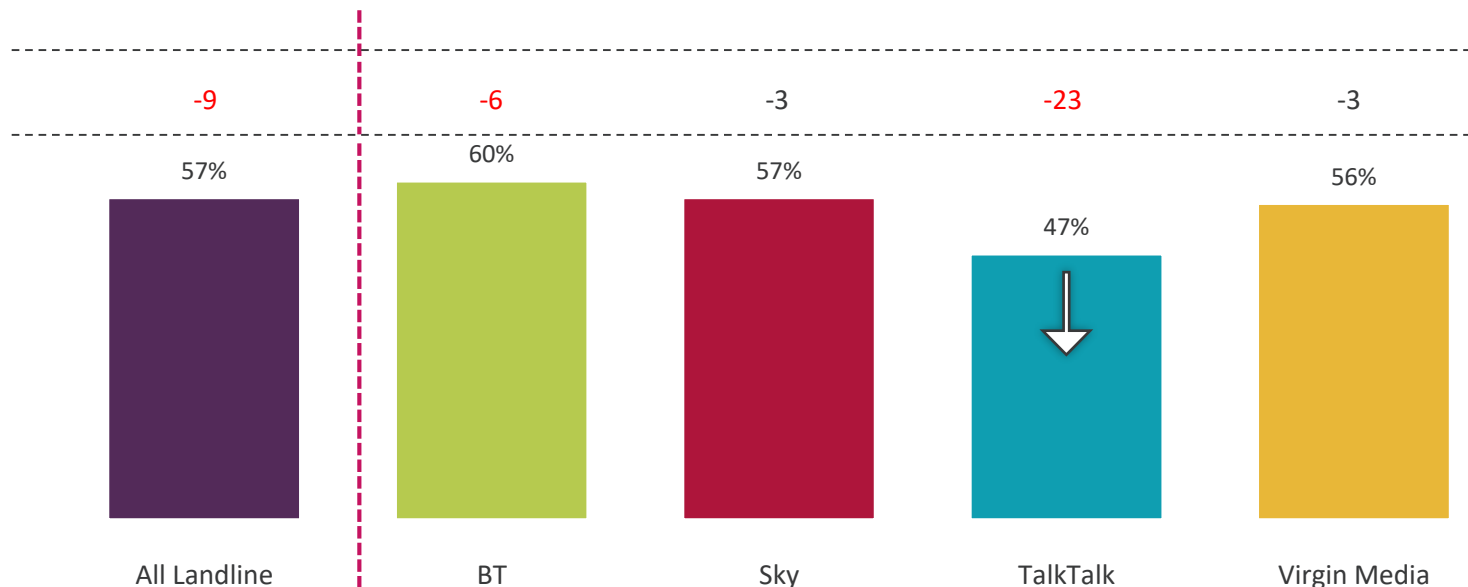
¹All contacting by phone (355/95*/62*/95*/103)

Overall, over half of landline complaints were completely resolved (a decrease since 2016); the proportion was lower for TalkTalk.

Proportion whose most recent complaint was completely resolved

Landline complaints % Completely Resolved

% points difference
2017 vs. 2016



❖ YoY = 2017% - 2016%

	2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY
Billing/Customer Service	52%	-2	53%	-1	49%	-7	54%	4	49%	-5
Repairs/Installation	65%	-1	71%	4	63%	-4	50%↓	-10	61%	-7
Service Issues	55%	-19	57%	-18	57%	92	41%↓	-43	57%	-5

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? Base: All who complained about the landline service in past 6 months: 2016: All / Billing/Customer Service / Service Issues (2468/840/593/944), BT (925/285/244/367), Sky (489/188/162/120), TalkTalk (537/143/70*/302), Virgin Media (517/224/117/155). 2017: All / Billing/Customer Service / Service Issues (2002/737/600/573), BT (579/215/185/157), Sky (500/184/156/136), TalkTalk (420/138/111/144), Virgin Media (503/200/148/136).

↑ ↓ Indicates significantly higher/lower than the sector/complaint type average at the 95% confidence level. **Red text** Indicates significantly lower than 2016 at the 95% confidence level.

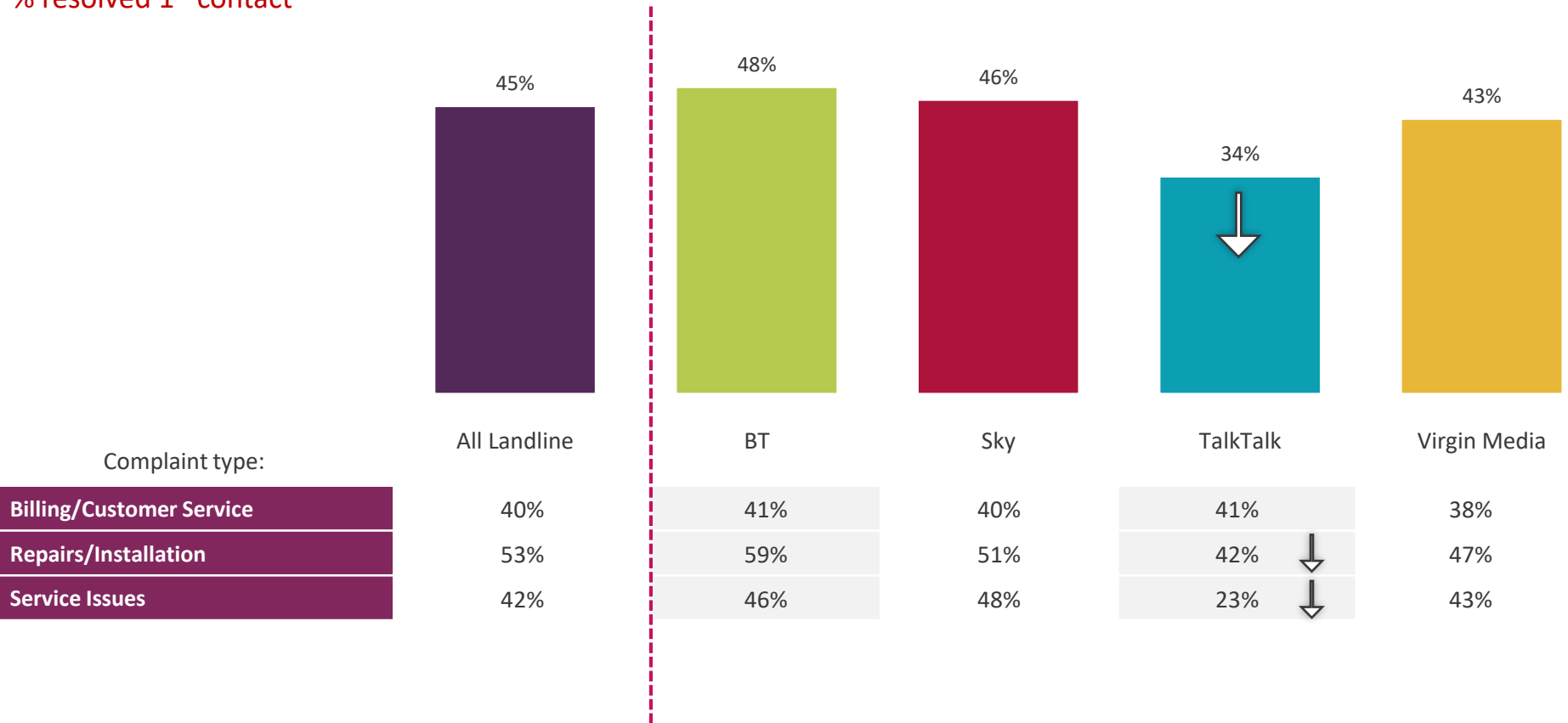
Green text Indicates significantly higher than 2016 at the 95% confidence level

Overall, more than two in five landline complaints were resolved on first contact; lower for TalkTalk.



Proportion where complaint was resolved on first contact

Landline complaints % resolved 1st contact



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

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 landline service in past 6 months: 2017: All / Billing/Customer Service / Service Issues (2002/737/600/573), BT (579/215/185/157), Sky (500/184/156/136), TalkTalk (420/138/111/144), Virgin Media (503/200/148/136).

↑ ↓ Indicates significantly higher/lower than the sector/complaint type average at the 95% confidence level.

Mobile complaints

Executive summary – mobile (1)

High level summary:

Overall satisfaction

- **Over half** (56%) of mobile customers who contacted their provider with a complaint were satisfied with how the complaint was handled; overall satisfaction with complaint handling was higher for **Tesco Mobile** (67%) and **EE** (61%) and lower for **Virgin Mobile** (49%) and **Vodafone** (47%).
 - Compared to 2016 **Virgin Mobile** declined for overall satisfaction.

Satisfaction among completely resolved

- **Over three in four** (78%) whose complaint was completely resolved were satisfied with complaint handling, there was no variation by provider and no change from 2016.

Completely resolved

- **Over half** (54%) of mobile complaints were completely resolved, a decrease since 2016 (57%). **EE** (61%) resolved a higher proportion and **Three** (49%), **Virgin Mobile** (47%) and **Vodafone** (47%) resolved a lower proportion.
 - Compared to 2016 **Tesco Mobile**, **Virgin Mobile** and **O2** all saw declines in the proportion of completely resolved complaints.

Executive summary – mobile (2)

High level summary:

Satisfaction by complaint type

- Satisfaction with *billing and customer service* complaints was higher than average for **Tesco Mobile** and **EE** and lower for **Vodafone**. *Service issues* complaints were lower than average for **Virgin Mobile** – compared to 2016, **Virgin Mobile** and **Three** declined. *Repairs and installation* complaints declined for **Virgin Mobile** and **O2** compared to 2016.

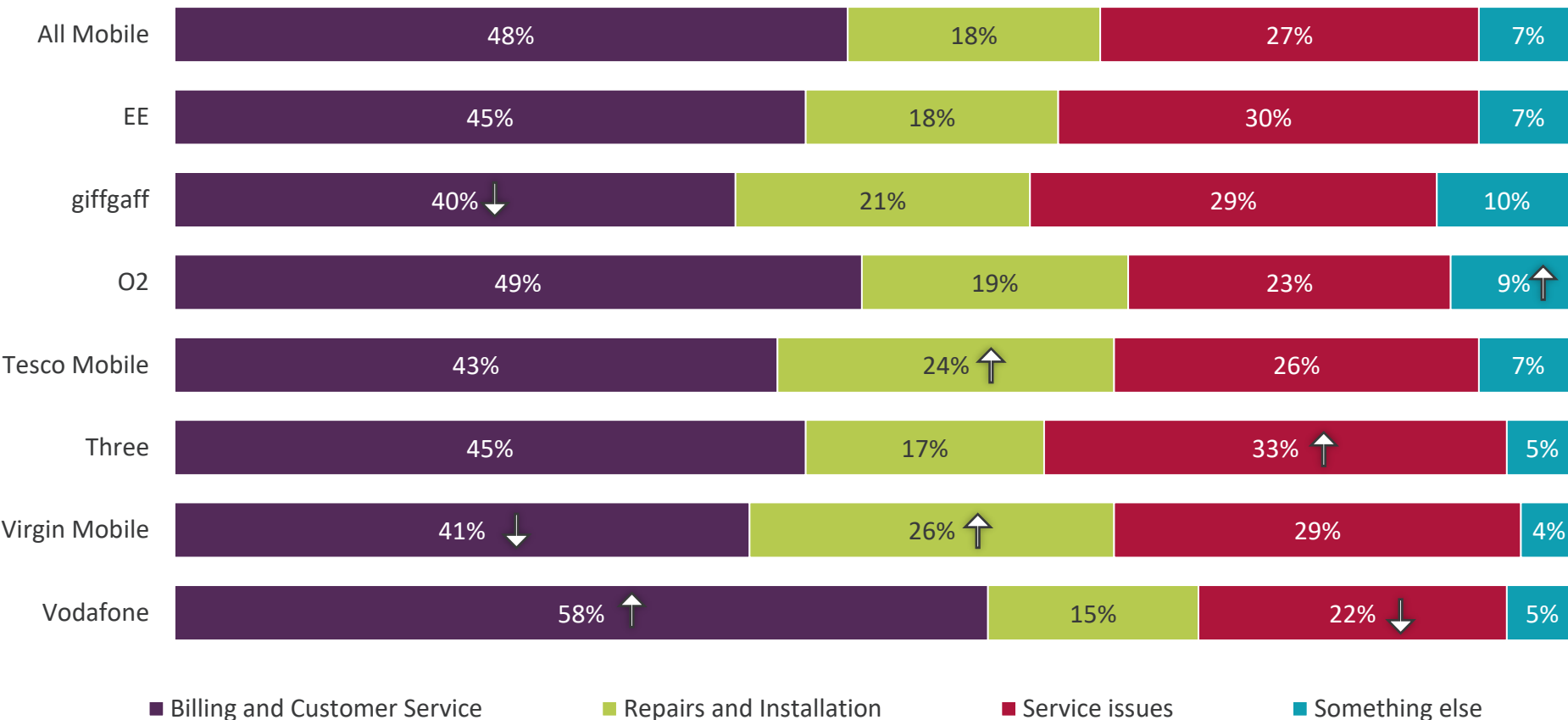
Resolved on first contact

- **Over two in five** (43%) of mobile complaints were resolved on first contact; **Tesco Mobile** (50%) and **EE** (48%) were more likely to resolve the complaint on first contact, while **Vodafone** (35%) was less likely to do so.



Type of complaint varied by provider; compared to all mobile complaints Vodafone had a higher proportion of *billing/customer service* complaints. Tesco Mobile and Virgin Mobile had a higher proportion of *repairs/installation* complaints; and Three had a higher proportion for *service issues*.

Complaint type
Mobile complaints



Source: Ofcom Quality of customer service – complaints research, online survey, fieldwork carried out by BDRC, December 2017/January 2018
 Q. And thinking of the most recent complaint you had to contact [company] about, which one of the following categories did the issue fall into?
 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).
 ↑ ↓ Indicates significantly higher/lower than the sector average at the 95% confidence level.

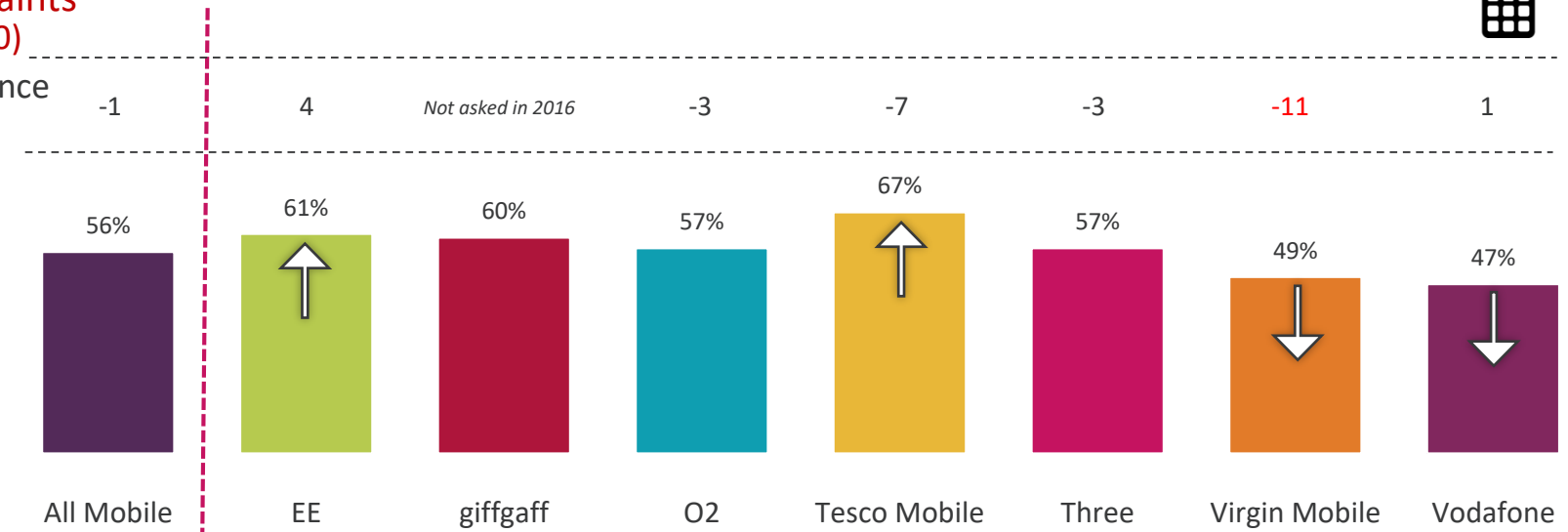
Overall, more than half of mobile complaints were handled to customers' satisfaction; higher for Tesco Mobile and EE and lower for Virgin Mobile and Vodafone.



Overall satisfaction with provider's handling of most recent complaint

Mobile complaints % Satisfied (7-10)

% points difference
2017 vs. 2016



	2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY
Billing/Customer Service	53%	2	61%↑	2	57%*	N/A	53%	1	69%↑	-4	56%	3	49%	2	42%↓	1
Repairs/Installation	57%	-4	60%*	6	**	N/A	53%	-14	61%*	-6	60%*	-2	60%*	-16	51%*	-9
Service Issues	59%	-2	63%	8	55%*	N/A	64%	1	69%*	-8	54%	-11	40%*↓	-24	57%	8

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; 2016: All / Billing/Customer Service / Service Issues (2989/1301/553/984), EE (666/309/125/198), O2 (729/286/145/262), Tesco Mobile (327/74*/51*/186), Three (500/204/84*/179), Virgin Mobile (258/117/76*/56*), Vodafone (509/311/72*/103). 2017: All / Billing/Customer Service / Service Issues (2856/1339/545/777), EE (511/231/93*/152), giffgaff (219/87*46**/64*), O2 (538/262/102/123), Tesco Mobile (319/137/76*/84*), Three (500/223/85*/165), Virgin Mobile (269/109/70*/78*), Vodafone (500/290/73*/111).

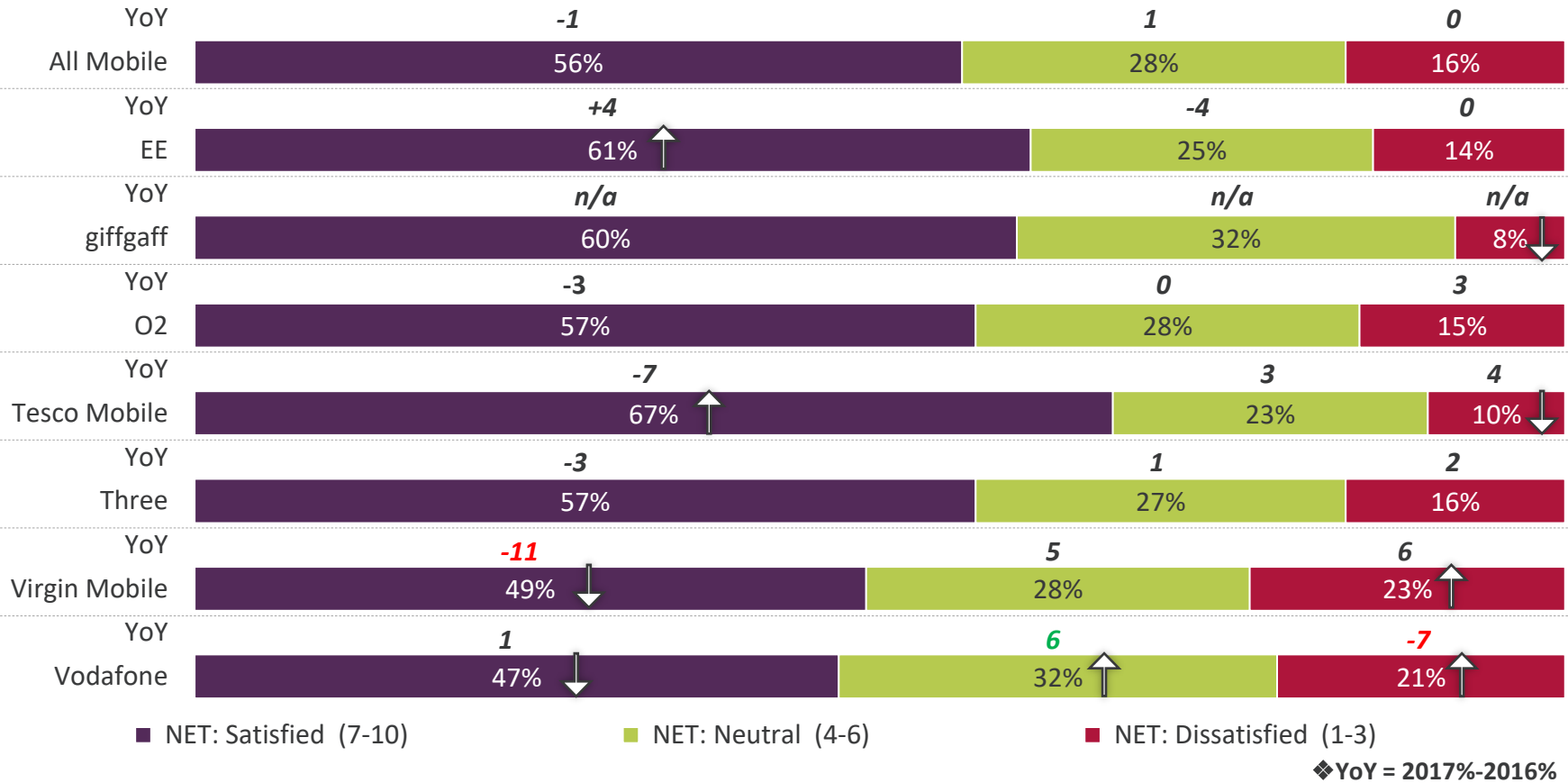
↑ ↓ Indicates significantly higher/lower than the sector/complaint type average at the 95% confidence level. Red text indicates significantly lower than 2016 at the 95% confidence level.

Green text indicates significantly higher than 2016 at the 95% confidence level

Compared to 2016, satisfaction has remained relatively stable. However, Virgin Mobile had a decrease in satisfaction and Vodafone saw a shift from dissatisfied to neutral.



Satisfaction shifts Mobile complaints



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).

↑ ↓ Indicates significantly higher/lower than the sector/complaint type average at the 95% confidence level. Red text Indicates significantly lower than 2016 at the 95% confidence level.

Green text Indicates significantly higher than 2016 at the 95% confidence level

Overall, over three in four whose mobile complaint was completely resolved were satisfied with the complaint handling. There was no variation by provider.

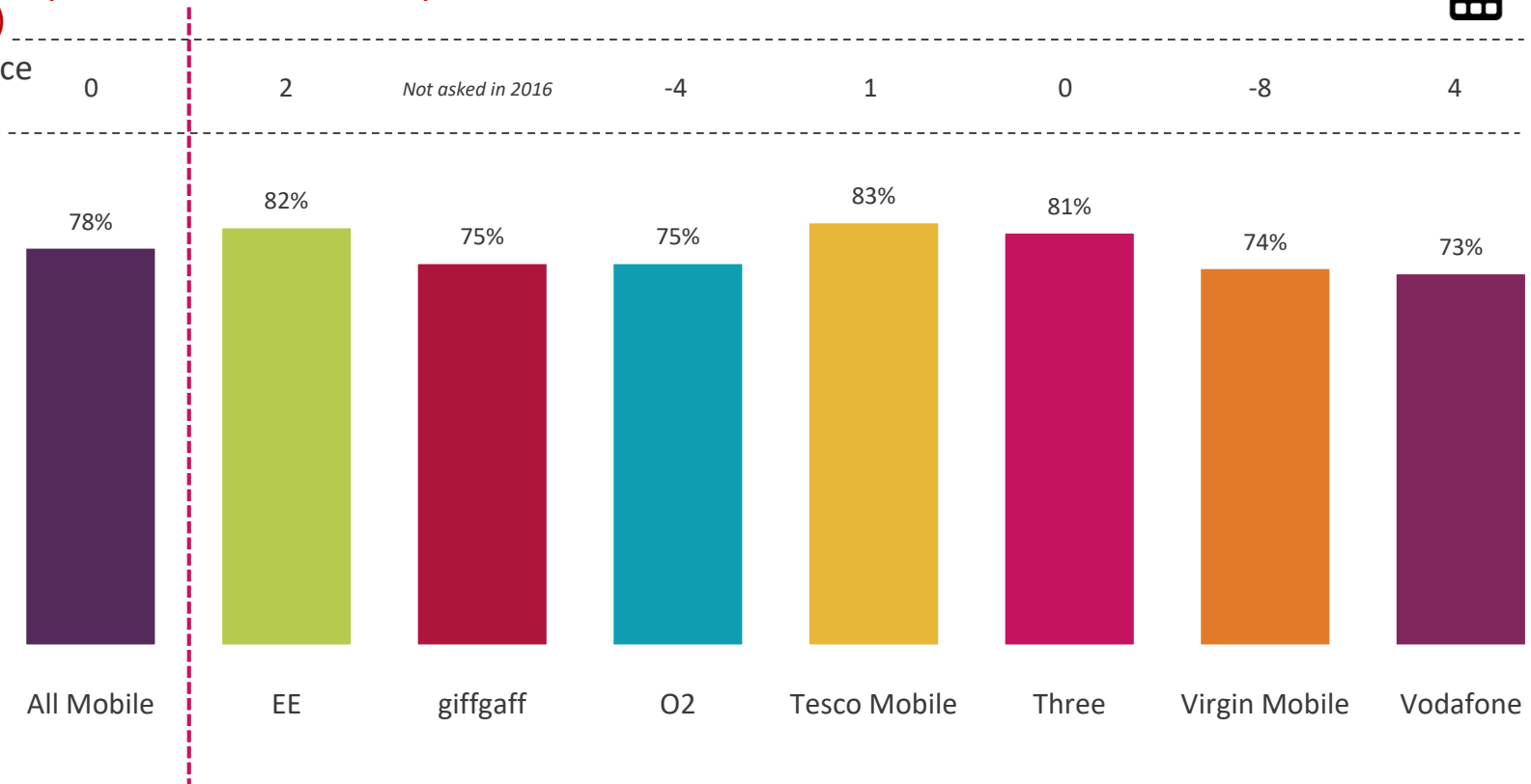


Overall satisfaction with provider's handling of most recent complaint

Among completely resolved mobile complaints

% Satisfied (7-10)

% points difference
2017 vs. 2016



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 whose issue was completely resolved: 2017: All (1758), EE (370), O2 (457), Tesco Mobile (264), Three (266), Virgin Mobile (153), Vodafone (248). 2016: All (1525), EE (311), giffgaff (124), O2 (293), Tesco Mobile (189), Three (244), Virgin Mobile (127), Vodafone (237).

↑ ↓ Indicates significantly higher/lower than the sector/complaint type average at the 95% confidence level. **Red text** Indicates significantly lower than 2016 at the 95% confidence level.

Green text Indicates significantly higher than 2016 at the 95% confidence level

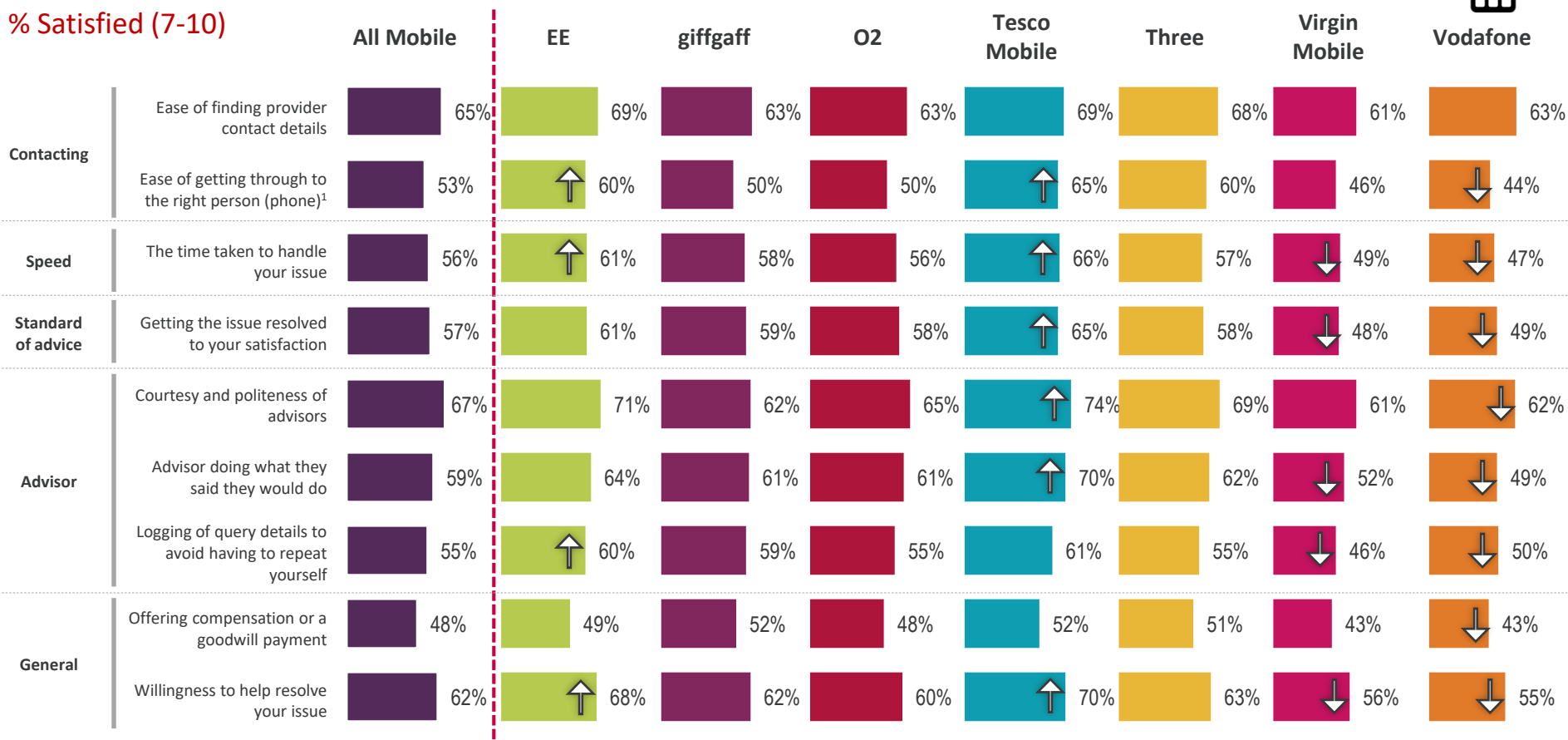


Tesco Mobile was above average for six specific aspects of complaints handling, followed by EE for four. Vodafone was below average for eight specific aspects and Virgin Mobile for five.

Satisfaction with specific aspects

Mobile complaints – All

% Satisfied (7-10)



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 – All (2856), EE (511), giffgaff (219), O2 (538), Tesco Mobile (319), Three (500), Virgin Mobile (269), Vodafone (500). ↑ ↓ Indicates significantly higher/lower than the sector average at the 95% confidence level. * Caution: small base. ¹All contacting by phone (1305/250/230/119/257/146/249/54*)

Compared to 2016, EE had increases in satisfaction for two specific aspects and Tesco Mobile for one; Virgin Mobile had declines for eight aspects, and O2 and Tesco Mobile for five.



Satisfaction with specific aspects

Mobile complaints – All

% Satisfied (7-10)

YoY=2017%-2016%

	All Mobile		EE		giffgaff		O2		Tesco Mobile		Three		Virgin Mobile		Vodafone		
	2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY	
Contacting	Ease of finding provider contact details	65%	0	69%	7	63%	N/A	63%	-4	69%	0	68%	-2	61%	-11	63%	3
	Ease of getting through to the right person (phone) ¹	53%	-1	60%	5	50%	N/A	50%	-7	65%	-1	60%	-2	46%	-4	44%	1
Speed	The time taken to handle your issue	56%	-2	61%	3	58%	N/A	56%	-8	66%	-12	57%	-1	49%	-13	47%	3
Standard of advice	Getting the issue resolved to your satisfaction	57%	-2	61%	2	59%	N/A	58%	-8	65%	-15	58%	-1	48%	-11	49%	4
Advisor	Courtesy and politeness of advisors	67%	0	71%	2	62%	N/A	65%	-4	74%	9	69%	4	61%	-10	62%	1
	Advisor doing what they said they would do	59%	-2	64%	1	61%	N/A	61%	-4	70%	3	62%	-1	52%	-12	49%	-1
	Logging of query details to avoid having to repeat yourself	55%	-2	60%	5	59%	N/A	55%	-9	61%	-11	55%	-3	46%	-17	50%	5
General	Offering compensation or a goodwill payment	48%	-3	49%	3	52%	N/A	48%	-9	52%	-22	51%	2	43%	-19	43%	1
	Willingness to help resolve your issue	62%	-1	68%	6	62%	N/A	60%	-7	70%	-11	63%	-2	56%	-9	55%	3

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 – All (2856), EE (511), giffgaff (219), O2 (538), Tesco Mobile (319), Three (500), Virgin Mobile (269), Vodafone (500). **Red** or **Green** text indicates significantly lower/higher than 2016 at the 95% confidence level. * Caution: small base. ¹All contacting by phone (1305/250/230/119/257/146/249/54*)

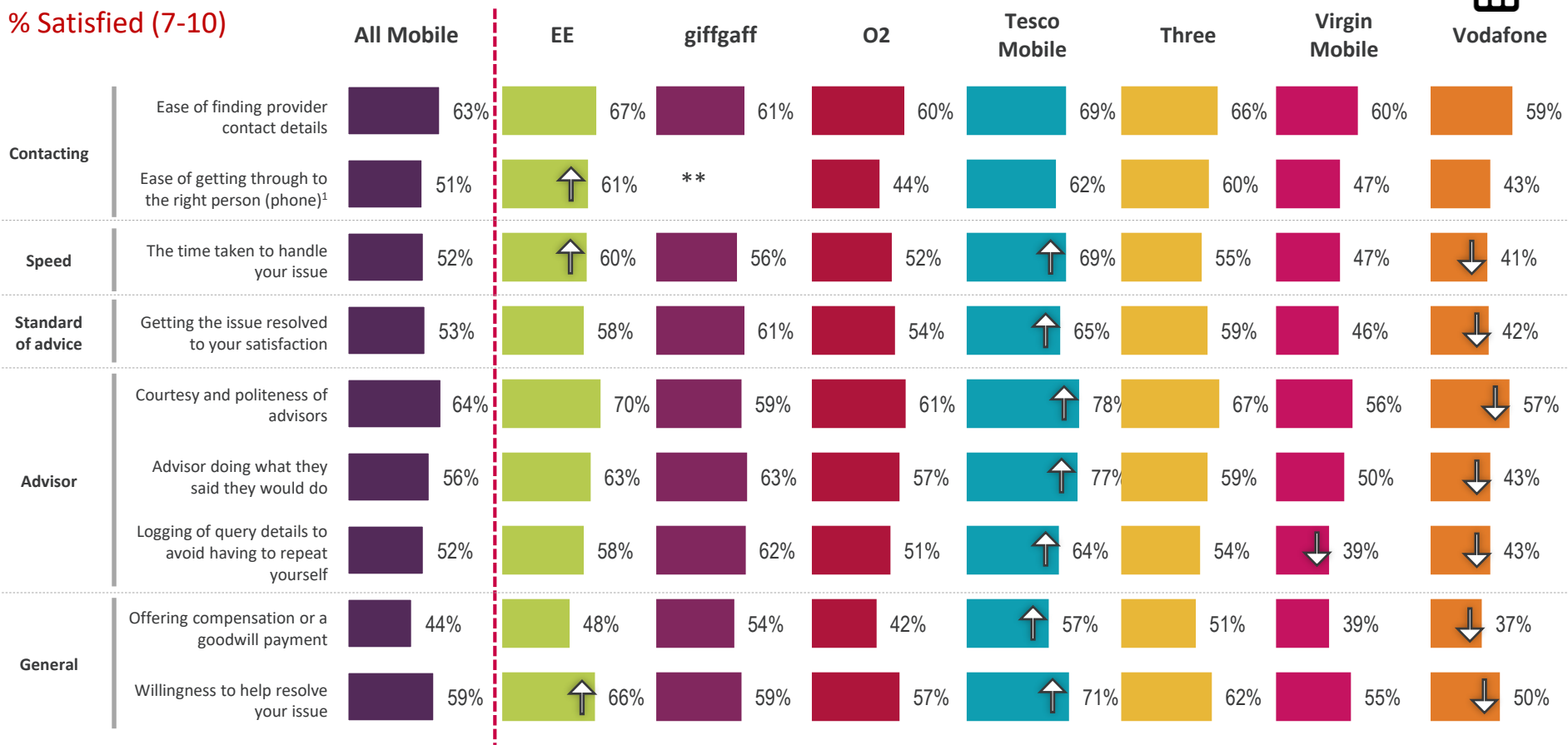
For *billing/customer service* complaints, Tesco Mobile was above average for satisfaction for seven specific aspects of customer service and EE for three; Vodafone was below average for seven specific aspects and Virgin Mobile for one.



Satisfaction with specific aspects

Mobile complaints – Billing and Customer Service

% Satisfied (7-10)



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 – Billing and Customer service (1339), EE (231), giffgaff (87*), O2 (262), Tesco Mobile (137), Three (223), Virgin Mobile (109), Vodafone (290). ↑ ↓ Indicates significantly higher/lower than the sector average at the 95% confidence level. * Caution: small base. ¹All contacting by phone (687/134/124/52*/119/66*/170/22**) **Base too small to chart

There were no changes compared to 2016 for *billing/customer service* complaints.



Satisfaction with specific aspects

Mobile complaints – Billing and Customer Service

YoY=2017%-2016%

% Satisfied (7-10)

		All Mobile		EE		giffgaff		O2		Tesco Mobile		Three		Virgin Mobile		Vodafone	
		2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY
Contacting	Ease of finding provider contact details	63%	0	67%	5	61%	N/A	60%	-6	69%	-1	66%	-5	60%	-2	59%	1
	Ease of getting through to the right person (phone) ¹	51%	0	61%	4	**	N/A	44%	-8	62%	**	60%	-2	47%	10	43%	4
Speed	The time taken to handle your issue	52%	1	60%	0	56%	N/A	52%	-3	69%	-1	55%	3	47%	1	41%	2
Standard of advice	Getting the issue resolved to your satisfaction	53%	1	58%	-3	61%	N/A	54%	-3	65%	-3	59%	7	46%	-1	42%	2
Advisor	Courtesy and politeness of advisors	64%	0	70%	1	59%	N/A	61%	-6	78%	1	67%	4	56%	-5	57%	-2
	Advisor doing what they said they would do	56%	0	63%	0	63%	N/A	57%	-1	77%	8	59%	-2	50%	0	43%	-3
	Logging of query details to avoid having to repeat yourself	52%	1	58%	4	62%	N/A	51%	-4	64%	-2	54%	0	39%	-10	43%	2
General	Offering compensation or a goodwill payment	44%	0	48%	2	54%	N/A	42%	-3	57%	-11	51%	4	39%	-8	37%	-1
	Willingness to help resolve your issue	59%	3	66%	3	59%	N/A	57%	-2	71%	-3	62%	3	55%	4	50%	4

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 – Billing and Customer service (1339), EE (231), giffgaff (87*), O2 (262), Tesco Mobile (137), Three (223), Virgin Mobile (109), Vodafone (290). **Red** or **Green** text indicates significantly lower/higher than 2016 at the 95% confidence level. * Caution: small base. ¹All contacting by phone (687/134/124/52*/119/66*/170/22**) **Base too small to chart

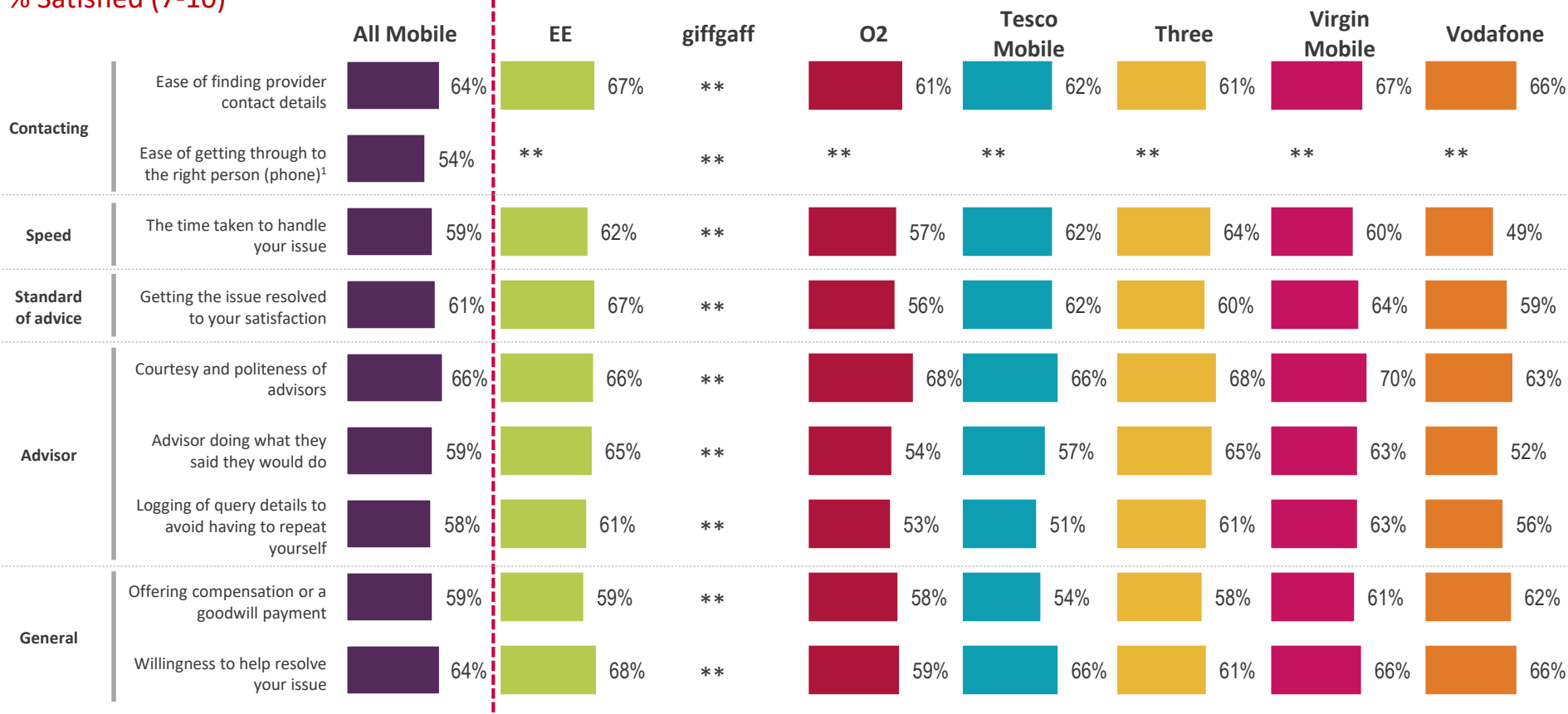
For repairs/installation complaints, no provider was above or below average for satisfaction with any specific aspects of complaints handling.



Satisfaction with specific aspects

Mobile complaints – Repairs and Installation

% Satisfied (7-10)



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 – Repairs and Installation (545), EE (93*), giffgaff (46**), O2 (102), Tesco Mobile (76*), Three (85*), Virgin Mobile (70*), Vodafone (73*).

↑ ↓ Indicates significantly higher/lower than the sector average at the 95% confidence level. * Caution: small base. ¹All contacting by phone (180/19**/37**/26**/33**/31**/24**/10**) **Base too small to chart

For repairs/installation complaints compared to 2016, no provider had increases for satisfaction for any specific aspects of complaints handling; Virgin Mobile had decreases for six, O2 for four and Tesco Mobile for two.



Satisfaction with specific aspects

Mobile complaints – Repairs and Installation

% Satisfied (7-10)		All Mobile		EE		giffgaff		O2		Tesco Mobile		Three		Virgin Mobile		Vodafone	
		2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY
Contacting	Ease of finding provider contact details	64%	-4	67%	2	**	N/A	61%	-7	62%	-16	61%	-6	67%	-20	66%	-1
	Ease of getting through to the right person (phone) ¹	54%	-5	**		**	N/A	**		**		**		**		**	
Speed	The time taken to handle your issue	59%	-5	62%	4	**	N/A	57%	-12	62%	-13	64%	6	60%	-19	49%	-14
Standard of advice	Getting the issue resolved to your satisfaction	61%	-4	67%	9	**	N/A	56%	-16	62%	-11	60%	-3	64%	-15	59%	-4
Advisor	Courtesy and politeness of advisors	66%	-4	66%	2	**	N/A	68%	-6	66%	-9	68%	6	70%	-10	63%	-11
	Advisor doing what they said they would do	59%	-7	65%	3	**	N/A	54%	-18	57%	-18	65%	5	63%	-16	52%	-11
	Logging of query details to avoid having to repeat yourself	58%	-4	61%	10	**	N/A	53%	-17	51%	-25	61%	4	63%	-17	56%	-5
General	Offering compensation or a goodwill payment	59%	-1	59%	7	**	N/A	58%	-11	54%	-17	58%	15	61%	-18	62%	-1
	Willingness to help resolve your issue	64%	-4	68%	5	**	N/A	59%	-13	66%	-9	61%	-3	66%	-13	66%	-3

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 – Repairs and Installation (545), EE (93*), giffgaff (46**), O2 (102), Tesco Mobile (76*), Three (85*), Virgin Mobile (70*), Vodafone (73*).

Red or Green text indicates significantly lower/higher than 2016 at the 95% confidence level. * Caution: small base. ¹All contacting by phone (180/19**/37**/26**/33**/31**/24**/10**) **Base too small to chart

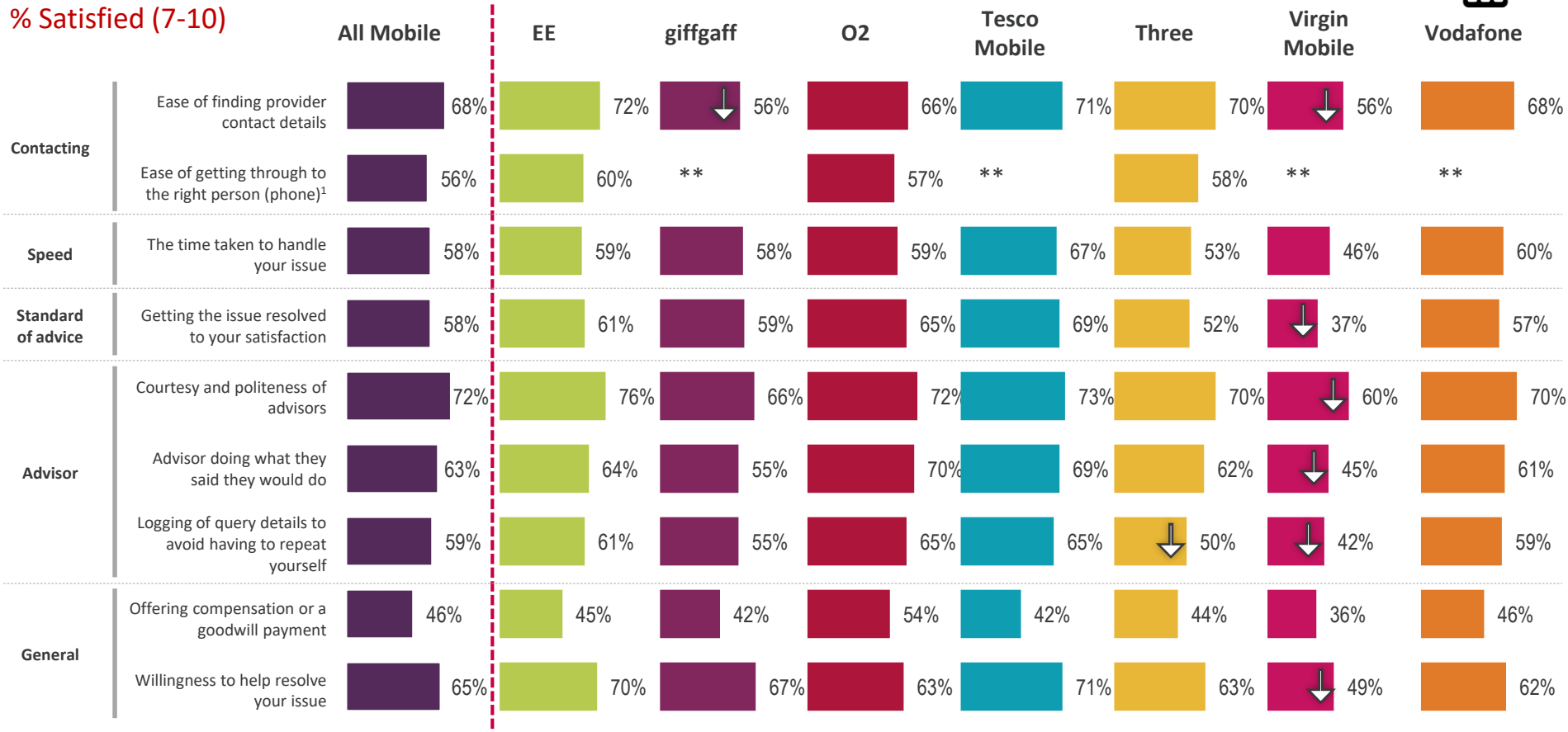
For *service issues* complaints, no provider was above average for satisfaction for any specific aspect; Virgin Mobile was below average for six, and Three and giffgaff for one each.



Satisfaction with specific aspects

Mobile complaints – Service Issues

% Satisfied (7-10)



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 – Service Issues (777), EE (152), giffgaff (64*), O2 (123), Tesco Mobile (84*), Three (165), Virgin Mobile (78*), Vodafone (111).

↑ ↓ Indicates significantly higher/lower than the sector average at the 95% confidence level. * Caution: small base. ¹All contacting by phone (359/77*/53*/29**/97*/41**/45**/17**) **Base too small to chart



For *service issues* complaints compared to 2016, EE and Tesco Mobile had increases in satisfaction for one specific aspect each; Virgin had decreases for eight, Three and Tesco for four and O2 for three.

Satisfaction with specific aspects

Mobile complaints – Service Issues

YoY=2017%-2016%

% Satisfied (7-10)

		All Mobile		EE		giffgaff		O2		Tesco Mobile		Three		Virgin Mobile		Vodafone	
		2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY
Contacting	Ease of finding provider contact details	68%	4	72%	13	56%	N/A	66%	0	71%	6	70%	1	56%	-19	68%	6
	Ease of getting through to the right person (phone) ¹	56%	0	60%	9	**	N/A	57%	-2	**		58%	-2	**		**	
Speed	The time taken to handle your issue	58%	-6	59%	4	58%	N/A	59%	-12	67%	-15	53%	-11	46%	-24	60%	10
Standard of advice	Getting the issue resolved to your satisfaction	58%	-7	61%	2	59%	N/A	65%	-8	69%	-19	52%	-12	37%	-22	57%	10
Advisor	Courtesy and politeness of advisors	72%	6	76%	6	66%	N/A	72%	4	73%	15	70%	3	60%	-19	70%	12
	Advisor doing what they said they would do	63%	-2	64%	-1	55%	N/A	70%	2	69%	4	62%	-4	45%	-28	61%	6
	Logging of query details to avoid having to repeat yourself	59%	-4	61%	1	55%	N/A	65%	-6	65%	-9	50%	-13	42%	-28	59%	12
General	Offering compensation or a goodwill payment	46%	-10	45%	3	42%	N/A	54%	-11	42%	-39	44%	-11	36%	-35	46%	0
	Willingness to help resolve your issue	65%	-4	70%	9	67%	N/A	63%	-10	71%	-15	63%	-7	49%	-26	62%	4

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 – Service Issues (777), EE (152), giffgaff (64*), O2 (123), Tesco Mobile (84*), Three (165), Virgin Mobile (78*), Vodafone (111). **Red** or **Green** text indicates significantly lower/higher than 2016 at the 95% confidence level. * Caution: small base. ¹All contacting by phone (359/77*/53*/29**/97*/41**/45**/17**) **Base too small to chart



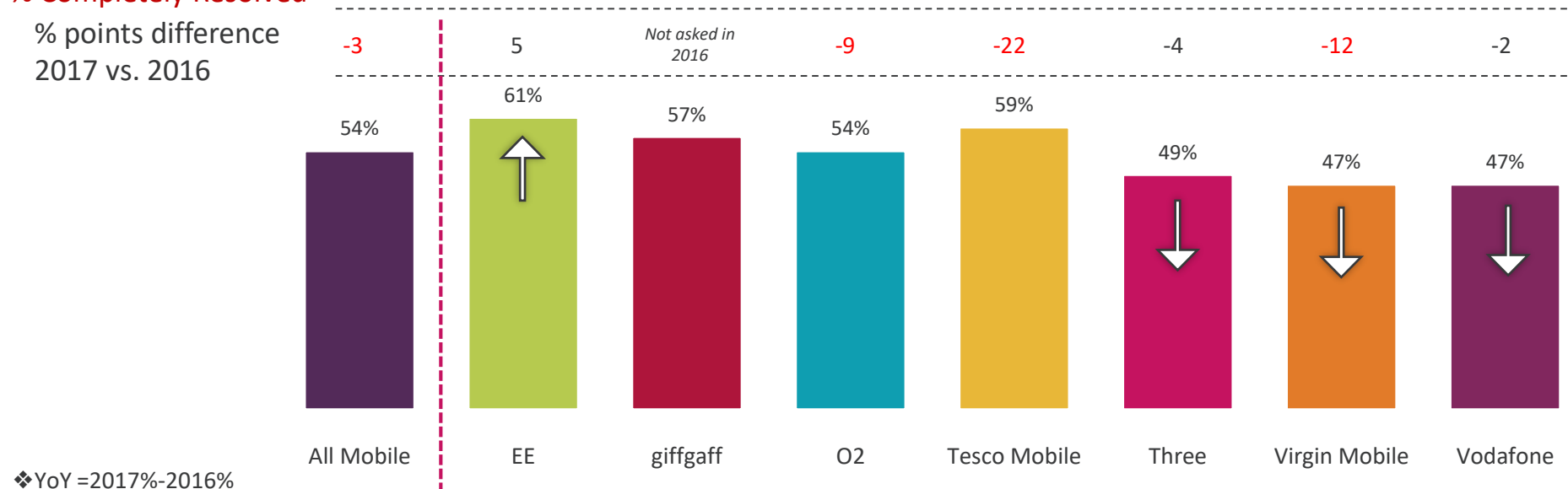
Overall, over half of mobile complaints were completely resolved (a decrease since 2016); higher for EE and lower for Three, Virgin Mobile and Vodafone.

Proportion whose most recent complaint was completely resolved

Mobile complaints

% Completely Resolved

% points difference
2017 vs. 2016



	2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY
Billing/ Customer Service	52%	0	59%↑	3	61%	N/A	48%	-4	59%	-17	53%	3	42%↓	-5	48%	0
Repairs/ Installation	59%	-2	69%	8	**	N/A	60%	0	62%	-11	45%↓	-16	57%	-14	52%	-4
Service Issues	52%	-10	58%	5	47%	N/A	59%	-14	58%	-29	40%↓	-13	45%	-21	45%	-1

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: 2016: All (2989), EE (666), O2 (729), Tesco Mobile (327), Three (500), Virgin Mobile (258), Vodafone (509). 2017: All / Billing/Customer Service / Service Issues (2856/1339/545/777), EE (511/231/93*/152), giffgaff (219/87*46**/64*), O2 (538/262/102/123), Tesco Mobile (319/137/76*/84*), Three (500/223/85*/165), Virgin Mobile (269/109/70*/78*), Vodafone (500/290/73*/111).

↑↓ Indicates significantly higher/lower than the sector/complaint type average at the 95% confidence level. Red text Indicates significantly lower than 2016 at the 95% confidence level.

Green text Indicates significantly higher than 2016 at the 95% confidence level

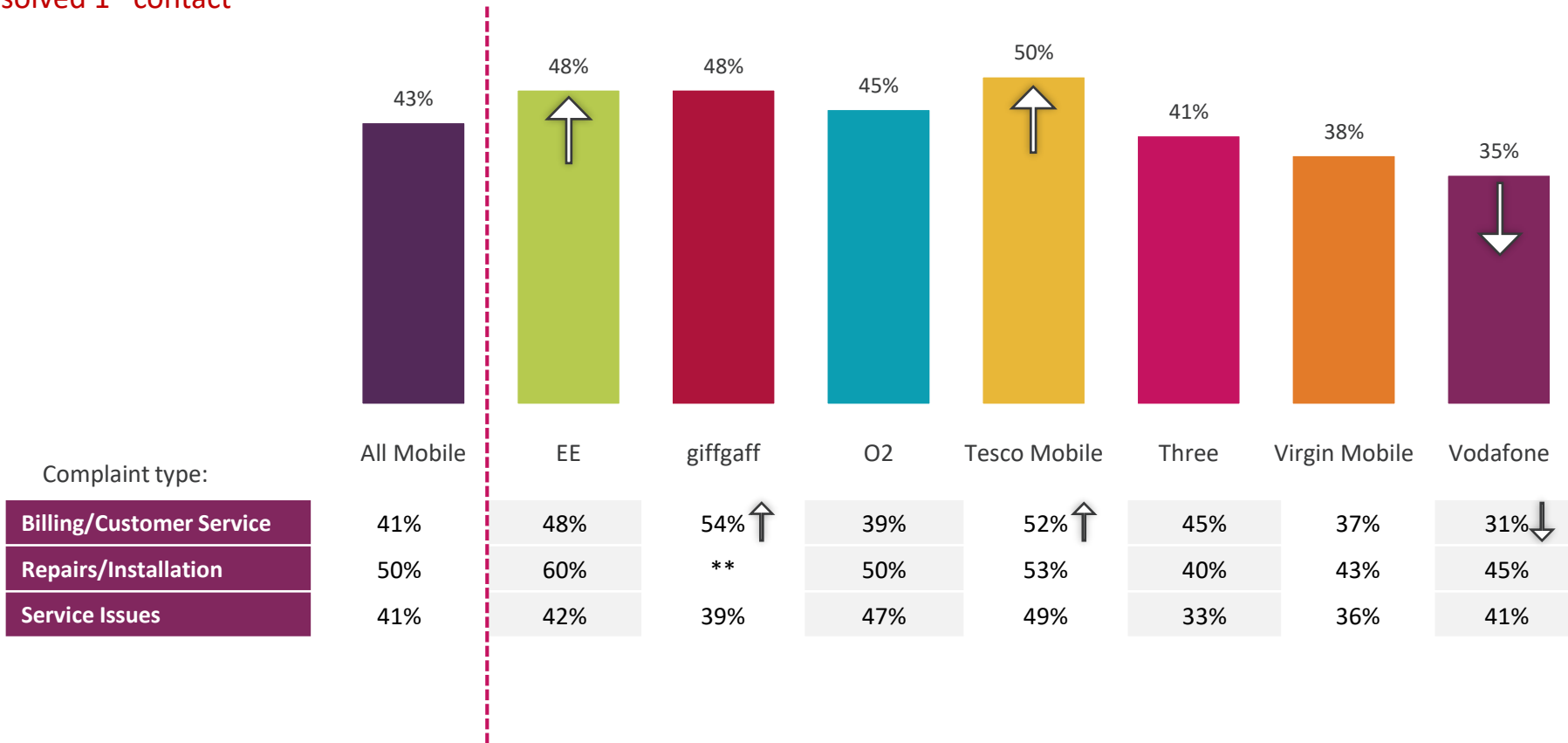
Overall, more than two in five mobile complaints were resolved on first contact; higher for Tesco Mobile and EE and lower for Vodafone.



Proportion where complaint was resolved on first contact

Mobile complaints

% resolved 1st contact



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

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: 2017: All/ Billing/Customer Service / Service Issues (2856/1339/545/777), EE (511/231/93*/152), giffgaff (219/87*46**/64*), O2 (538/262/102/123), Tesco Mobile (319/137/76*/84*), Three (500/223/85*/165), Virgin Mobile (269/109/70*/78*), Vodafone (500/290/73*/111).



↑ ↓ Indicates significantly higher/lower than the sector/complaint type average at the 95% confidence level. Red text Indicates significantly lower than 2016 at the 95% confidence level.

Green text Indicates significantly higher than 2016 at the 95% confidence level

Pay TV complaints

Executive summary – pay TV (1)

High level summary:

Overall satisfaction

- **More than half** (55%) of pay TV customers who contacted their provider with a complaint were satisfied with how the complaint was handled, a decline since 2016 (64%). Overall satisfaction with complaint handling was lower for **TalkTalk** (48%) and **Virgin Media** (47%).
 - Compared to 2016 **TalkTalk**, **Virgin Media** and **BT** all saw declines in overall satisfaction.

Satisfaction among completely resolved

- **Three in four** (76%) customers whose complaint was completely resolved were satisfied with complaint handling, a decline since 2016 (81%). Higher for **BT** (82%) and lower for **TalkTalk** (64%).
 - Compared to 2016, there was a decline overall and for **TalkTalk** and **Virgin Media**.

Completely resolved

- **Over half** (54%) of pay TV complaints were completely resolved, a decline since 2016 (64%). There were no differences by provider.
 - Compared to 2016 **TalkTalk**, **BT** and **Virgin Media** all saw declines in the proportion of complaints that were completely resolved.

Executive summary – pay TV (2)

High level summary:

Satisfaction by complaint type

- Satisfaction with *repairs and installation* and *service issues* complaints was higher than average for **BT** and lower than average for **TalkTalk**. *Billing and customer service* and *service issues* complaints were both lower than average for **Virgin Media**.
 - Compared to 2016, **Virgin Media** declined for all complaint types, while **TalkTalk** and **BT** both declined for *service issues* complaints.

Resolved on first contact

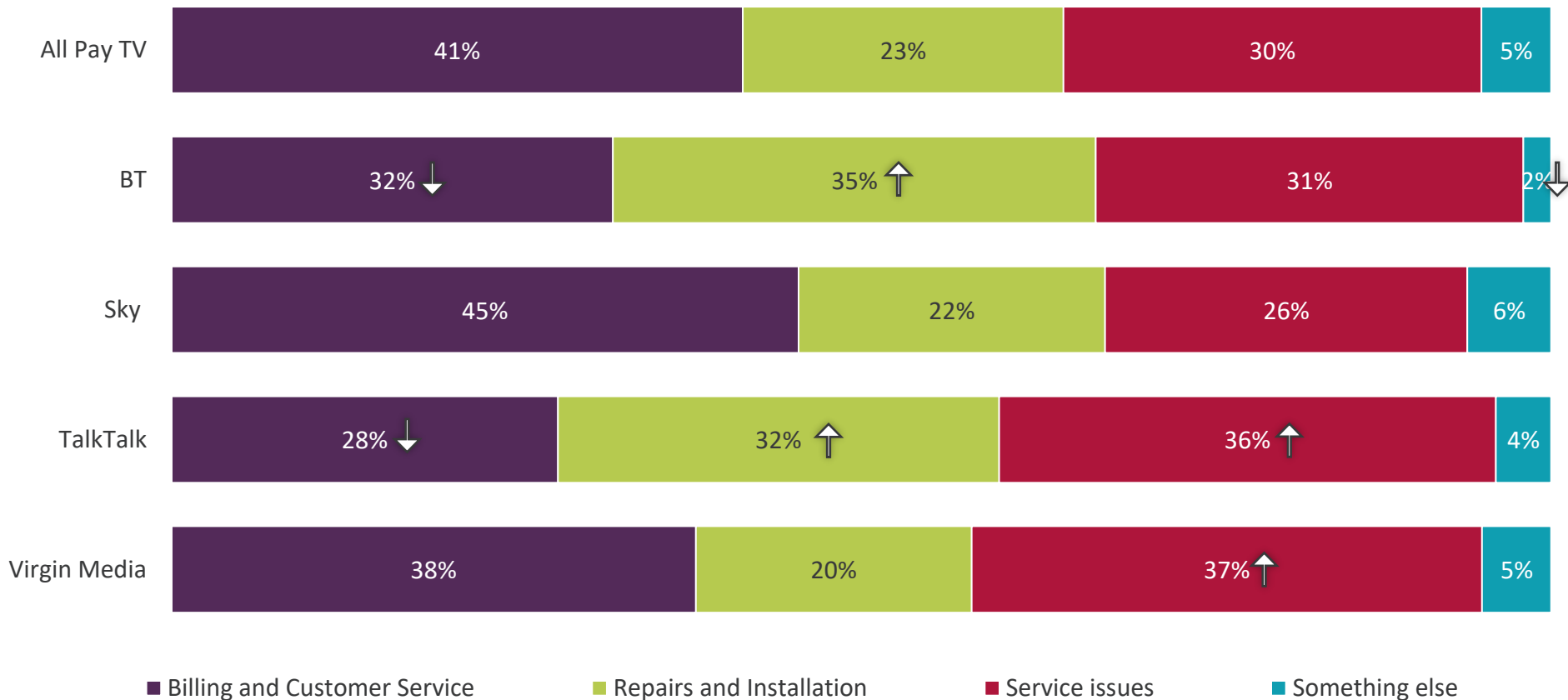
- **Two in five** (41%) pay TV complaints were resolved on first contact; **BT** (48%) was more likely to resolve the complaint on first contact, while **Virgin Media** (35%) was less likely to do so.



BT and TalkTalk had an above average proportion of *repairs/installation* complaints and a below average proportion of *billing/customer service* complaints compared to all pay TV; while Virgin Media and TalkTalk had an above average proportion of *service issue* complaints.

Complaint type

Pay TV complaints



Source: Ofcom Quality of customer service – complaints research, online survey, fieldwork carried out by BDRC, December 2017/January 2018
 Q. And thinking of the most recent complaint you had to contact [company] about, which one of the following categories did the issue fall into?
 Base: All who complained about the pay TV service in past 6 months (1824), BT (368), Sky (639) TalkTalk (298), Virgin Media (519).

↑ ↓ Indicates significantly higher/lower than the sector average at the 95% confidence level.

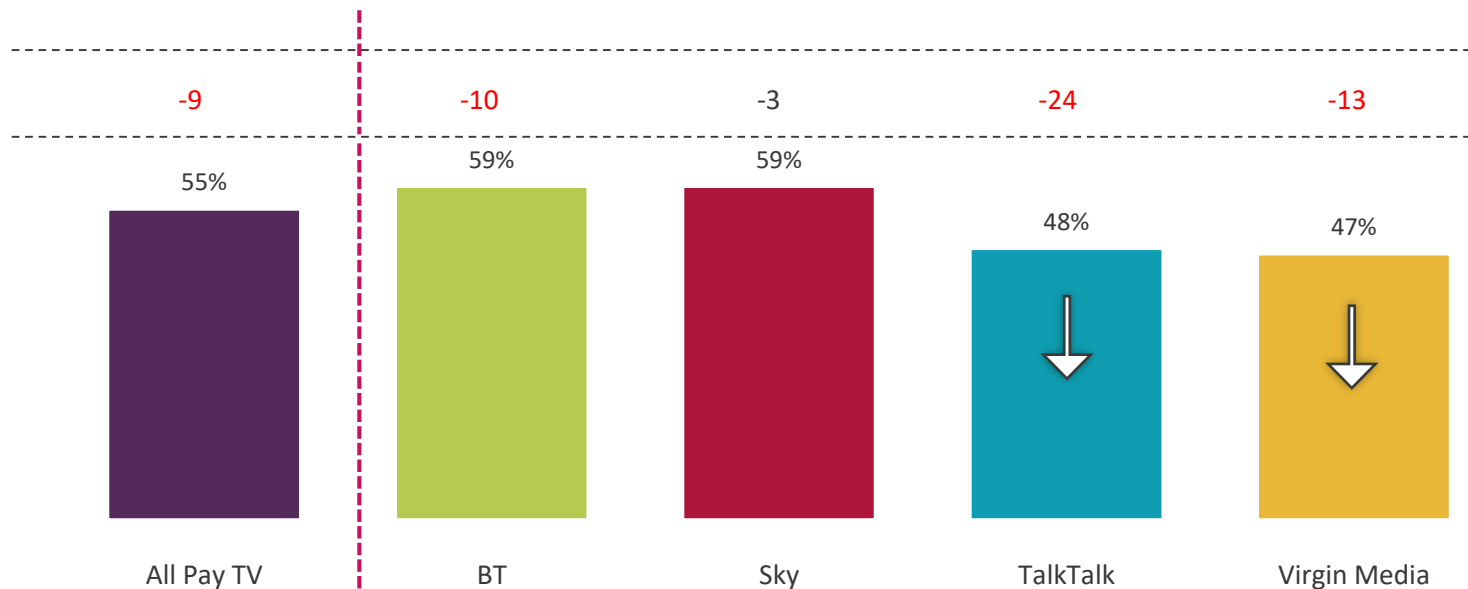
Overall, more than half of pay TV complaints were handled to customers' satisfaction (a decline since 2016); lower for Virgin Media and TalkTalk.



Overall satisfaction with provider's handling of most recent complaint

Pay TV complaints % Satisfied (7-10)

% points difference
2017 vs. 2016



❖ YoY = 2017% - 2016%

	2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY
Billing/Customer Service	53%	-6	55%	-1	56%	-5	51%*	**	45%↓	-11
Repairs/Installation	57%	-11	71%↑	0	59%	-7	45%*↓	**	50%	-20
Service Issues	54%	-12	50%	-22	61%	1	48%	-30	44%↓	-16

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 Pay TV service in past 6 months: 2016: All / Billing/Customer Service / Service Issues (2213/713/442/990), BT (507/82*/133/281), Sky (796/354*/178/228), TalkTalk (332/45**/35**/244), Virgin Media (578/232/96*/237). 2017: All / Billing/Customer Service / Service Issues (1824/688/470/582), BT (368/117/129/114), Sky (639/289/142/169), TalkTalk (298/83*/96*/108), Virgin Media (519/199/103/191).



Indicates significantly higher/lower than the sector/complaint type average at the 95% confidence level. **Red text** Indicates significantly lower than 2016 at the 95% confidence level.

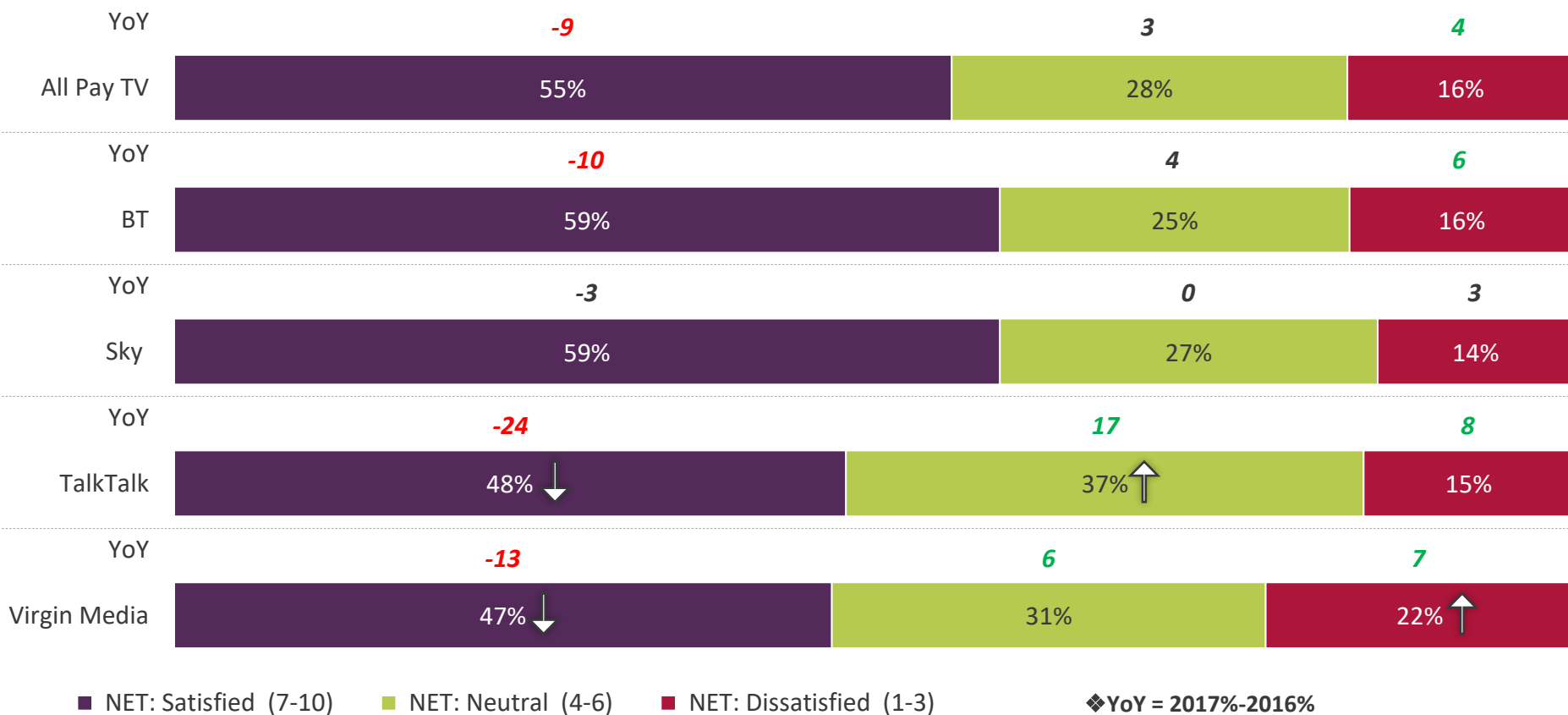
Green text Indicates significantly higher than 2016 at the 95% confidence level



Overall and for all providers apart from Sky, satisfaction declined from 2016. Where satisfaction decreased, dissatisfaction increased in all cases. For TalkTalk and Virgin Media, there was also an accompanying increase in the proportion being neutral.

Satisfaction shifts

Pay TV complaints



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 pay TV service in past 6 months (1824), BT (368), Sky (639) TalkTalk (298), Virgin Media (519).

↑ ↓ Indicates significantly higher/lower than 2016

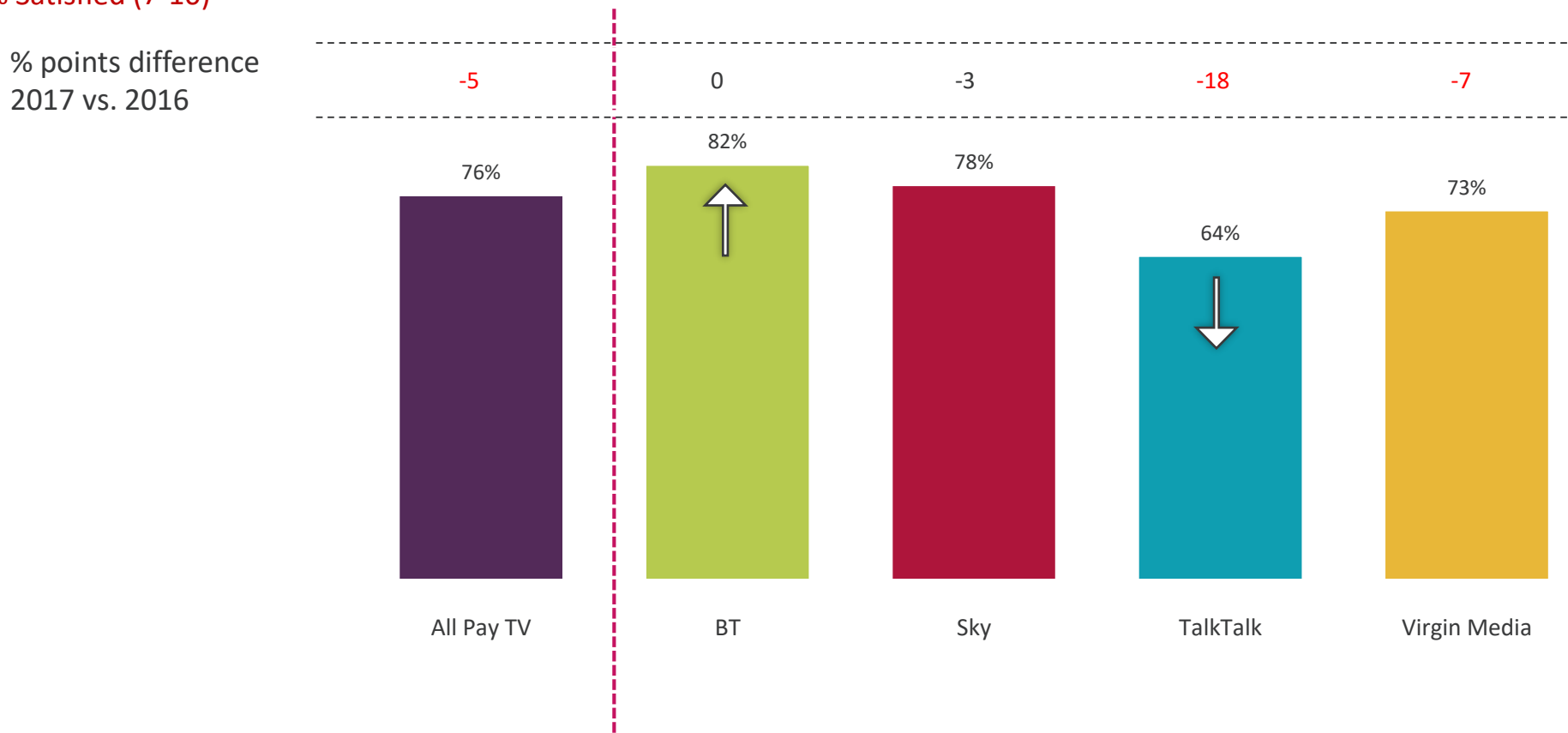


Overall, three in four whose pay TV complaint was completely resolved were satisfied with the complaint handling – satisfaction was above average for BT and below average for TalkTalk. Compared to 2016, there was a decline overall and for TalkTalk and Virgin Media.

Overall satisfaction with provider's handling of most recent complaint

Among completely resolved pay TV complaints

% Satisfied (7-10)



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 Pay TV service in past 6 months whose issue was completely resolved: 2016: All (1467), BT (399), Sky (462), TalkTalk (269), Virgin Media (337). 2017: All (979), BT (217), Sky (353), TalkTalk (150), Virgin Media (259).



Indicates significantly higher/lower than the sector/complaint type average at the 95% confidence level. **Red text** Indicates significantly lower than 2016 at the 95% confidence level.

Green text Indicates significantly higher than 2016 at the 95% confidence level

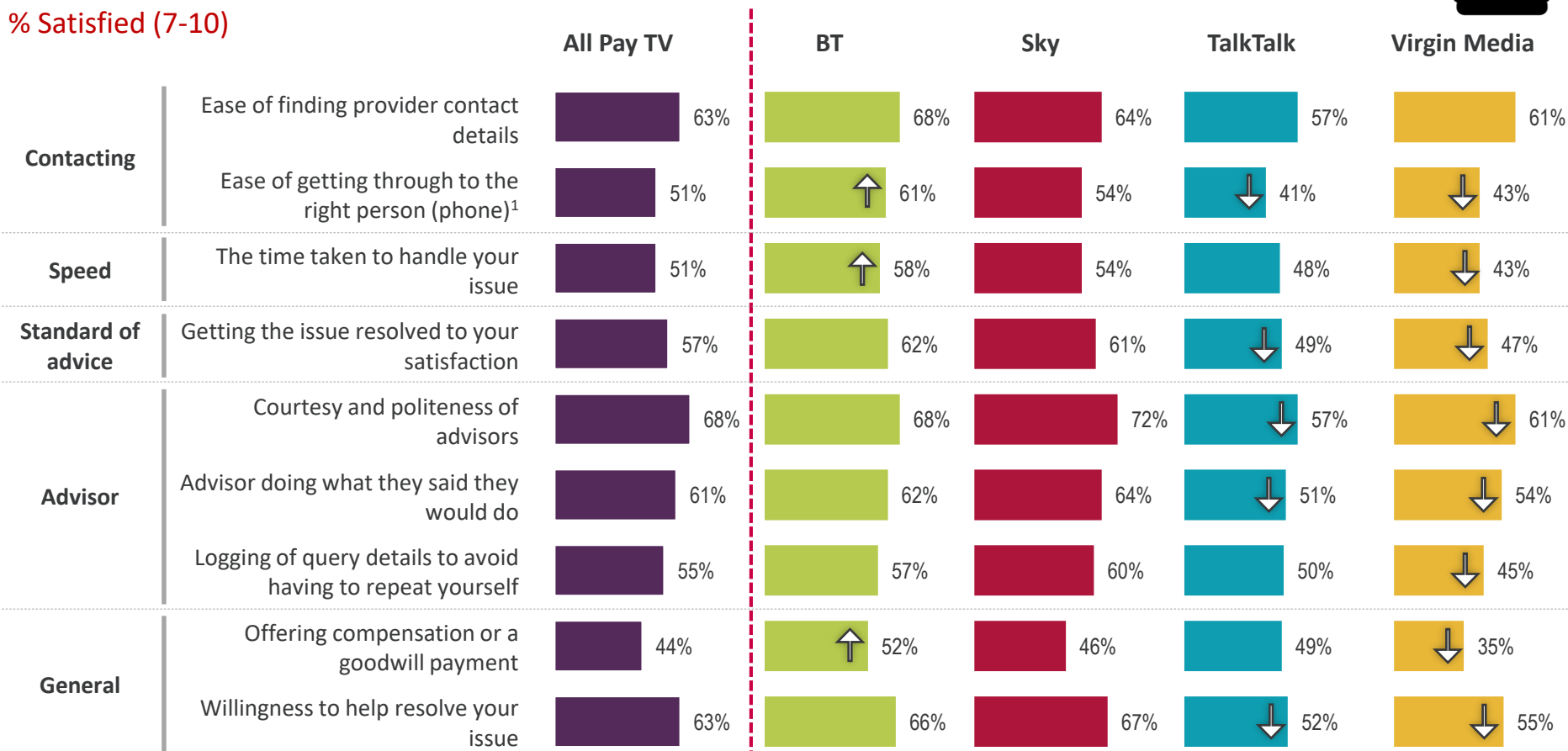
BT was above average for satisfaction for three specific aspects of complaints handling. Virgin Media was below average for eight specific aspects and TalkTalk for five.



Satisfaction with specific aspects

Pay TV complaints – All

% Satisfied (7-10)



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 Pay TV service in past 6 months – All (1824), BT (368), Sky (639), TalkTalk (298), Virgin Media (519).

↑ ↓ Indicates significantly higher/lower than the sector average at the 95% confidence level. * Caution: small base

¹All contacting by phone (1119/200/406/125/388)



Compared to 2016, BT had increases in satisfaction for two specific aspects of complaints handling. TalkTalk and Virgin Media both had decreases for *all* specific aspects, BT had decreases for five and Sky for two.

Satisfaction with specific aspects

Pay TV complaints – All

% Satisfied (7-10)

YoY=2017%-2016%

		All Pay TV		BT		Sky		TalkTalk		Virgin Media	
		2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY
Contacting	Ease of finding provider contact details	63%	-3	68%	7	64%	-1	57%	-10	61%	-9
	Ease of getting through to the right person (phone) ¹	51%	-4	61%	16	54%	-5	41%	-9	43%	-11
Speed	The time taken to handle your issue	51%	-10	58%	-11	54%	-6	48%	-22	43%	-12
Standard of advice	Getting the issue resolved to your satisfaction	57%	-9	62%	-14	61%	-2	49%	-27	47%	-13
Advisor	Courtesy and politeness of advisors	68%	-2	68%	5	72%	-1	57%	-11	61%	-7
	Advisor doing what they said they would do	61%	-7	62%	-3	64%	-6	51%	-17	54%	-12
	Logging of query details to avoid having to repeat yourself	55%	-9	57%	-12	60%	-3	50%	-18	45%	-14
General	Offering compensation or a goodwill payment	44%	-9	52%	-16	46%	-5	49%	-21	35%	-6
	Willingness to help resolve your issue	63%	-5	66%	-10	67%	2	52%	-24	55%	-8

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 Pay TV service in past 6 months – All (1824), BT (368), Sky (639), TalkTalk (298), Virgin Media (519).

Red or Green text indicates significantly lower/higher than 2016 at the 95% confidence level. * Caution: small base

¹All contacting by phone (1119/200/406/125/388)

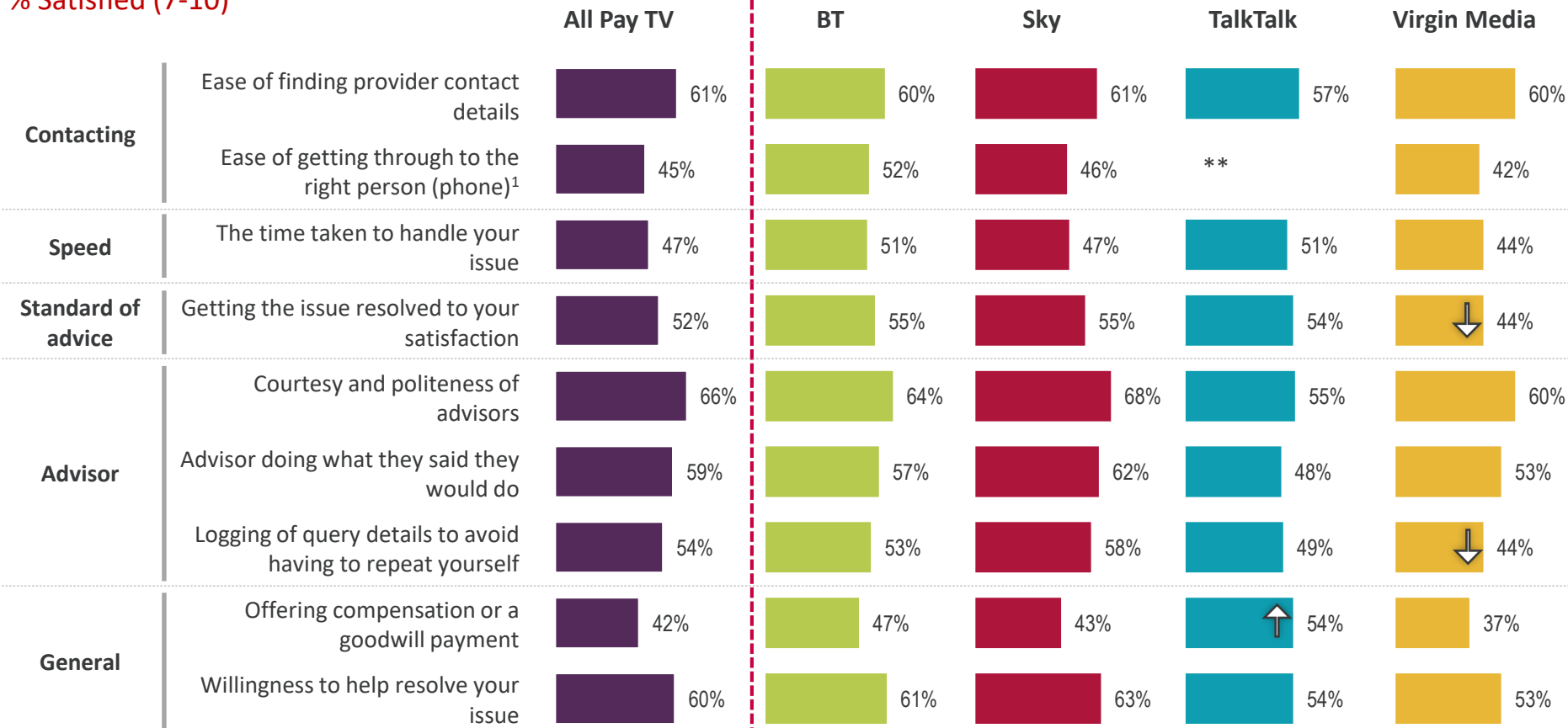


For *billing/customer service* complaints TalkTalk was above average for satisfaction for one specific aspect of complaints handling; Virgin Media was below average for two specific aspects.

Satisfaction with specific aspects

Pay TV complaints – Billing and Customer Service

% Satisfied (7-10)



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 Pay TV service in past 6 months – Billing and Customer Service (688), BT (117), Sky (289), TalkTalk (83*), Virgin Media (199).

↑ ↓ Indicates significantly higher/lower than the sector average at the 95% confidence level. * Caution: small base ** Base too small to chart

¹All contacting by phone (435/54*/200/32**/150)



For *billing/customer service* complaints compared to 2016, no provider had an increase for satisfaction for any specific aspects of complaints handling; Virgin Media decreased for four specific aspects and Sky for three.

Satisfaction with specific aspects

Pay TV complaints – Billing and Customer Service

% Satisfied (7-10)

YoY=2017%-2016%

		All Pay TV		BT		Sky		TalkTalk		Virgin Media	
		2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY
Contacting	Ease of finding provider contact details	61%	-3	60%	5	61%	-3	57%	**	60%	-8
	Ease of getting through to the right person (phone) ¹	45%	-9	52%	**	46%	-9	**	**	42%	-15
Speed	The time taken to handle your issue	47%	-10	51%	-9	47%	-10	51%	**	44%	-10
Standard of advice	Getting the issue resolved to your satisfaction	52%	-10	55%	-12	55%	-8	54%	**	44%	-14
Advisor	Courtesy and politeness of advisors	66%	-2	64%	3	68%	-2	55%	**	60%	-7
	Advisor doing what they said they would do	59%	-6	57%	1	62%	-4	48%	**	53%	-12
	Logging of query details to avoid having to repeat yourself	54%	-5	53%	-3	58%	-4	49%	**	44%	-9
General	Offering compensation or a goodwill payment	42%	-6	47%	-10	43%	-7	54%	**	37%	-3
	Willingness to help resolve your issue	60%	-2	61%	-4	63%	0	54%	**	53%	-6

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 Pay TV service in past 6 months – Billing and Customer Service (688), BT (117), Sky (289), TalkTalk (83*), Virgin Media (199).

Red or Green text indicates significantly lower/higher than 2016 at the 95% confidence level. * Caution: small base ** Base too small to chart

¹All contacting by phone (435/54*/200/32**/150)

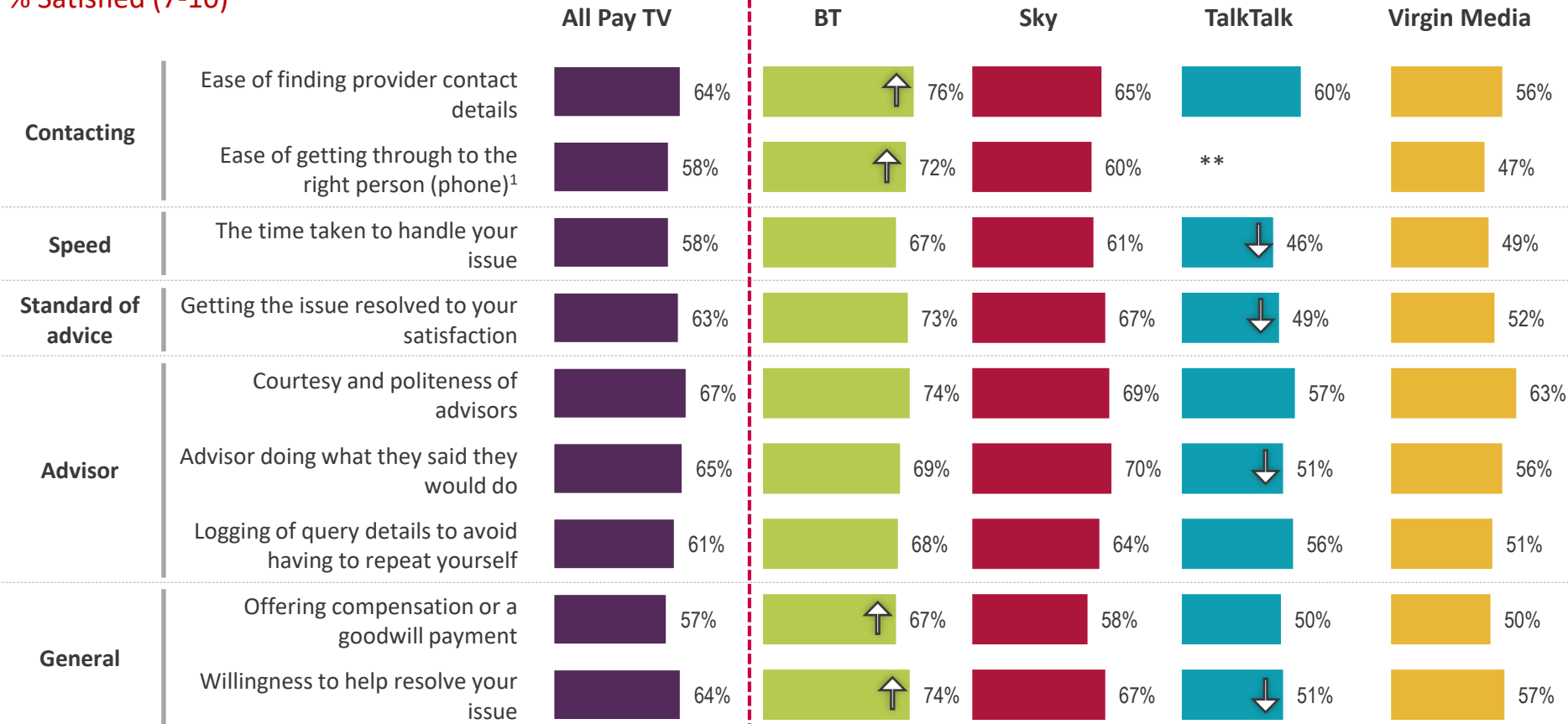
For repairs/installation complaints, BT was above average for satisfaction for four specific aspects of complaints handling, while TalkTalk was below average for four specific aspects.



Satisfaction with specific aspects

Pay TV complaints – Repairs and Installation

% Satisfied (7-10)



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 Pay TV service in past 6 months – Repairs and Installation (470), BT (129), Sky (142), TalkTalk (96*), Virgin Media (103).

↑ ↓ Indicates significantly higher/lower than the sector average at the 95% confidence level. * Caution: small base ** Base too small to chart

¹All contacting by phone (238/76*/67*/37**/58*)

For repairs/installation complaints compared to 2016, BT had an increase for one specific aspect of complaints handling, while Virgin Media had decreases for seven specific aspects.



Satisfaction with specific aspects

Pay TV complaints – Repairs and Installation

% Satisfied (7-10)

YoY=2017%-2016%

		All Pay TV		BT		Sky		TalkTalk		Virgin Media	
		2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY
Contacting	Ease of finding provider contact details	64%	-4	76%	13	65%	-3	60%	**	56%	-21
	Ease of getting through to the right person (phone) ¹	58%	0	72%	**	60%	-5	**	**	47%	**
Speed	The time taken to handle your issue	58%	-6	67%	2	61%	-5	46%	**	49%	-14
Standard of advice	Getting the issue resolved to your satisfaction	63%	-7	73%	0	67%	-1	49%	**	52%	-24
Advisor	Courtesy and politeness of advisors	67%	-7	74%	6	69%	-8	57%	**	63%	-14
	Advisor doing what they said they would do	65%	-7	69%	4	70%	-5	51%	**	56%	-20
	Logging of query details to avoid having to repeat yourself	61%	-8	68%	2	64%	-6	56%	**	51%	-21
General	Offering compensation or a goodwill payment	57%	-9	67%	-5	58%	-9	50%	**	50%	-13
	Willingness to help resolve your issue	64%	-9	74%	-2	67%	-6	51%	**	57%	-20

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 Pay TV service in past 6 months – Repairs and Installation (470), BT (129), Sky (142), TalkTalk (96*), Virgin Media (103).

Red or Green text indicates significantly lower/higher than 2016 at the 95% confidence level. * Caution: small base ** Base too small to chart

¹All contacting by phone (238/76*/67*/37**/58*)

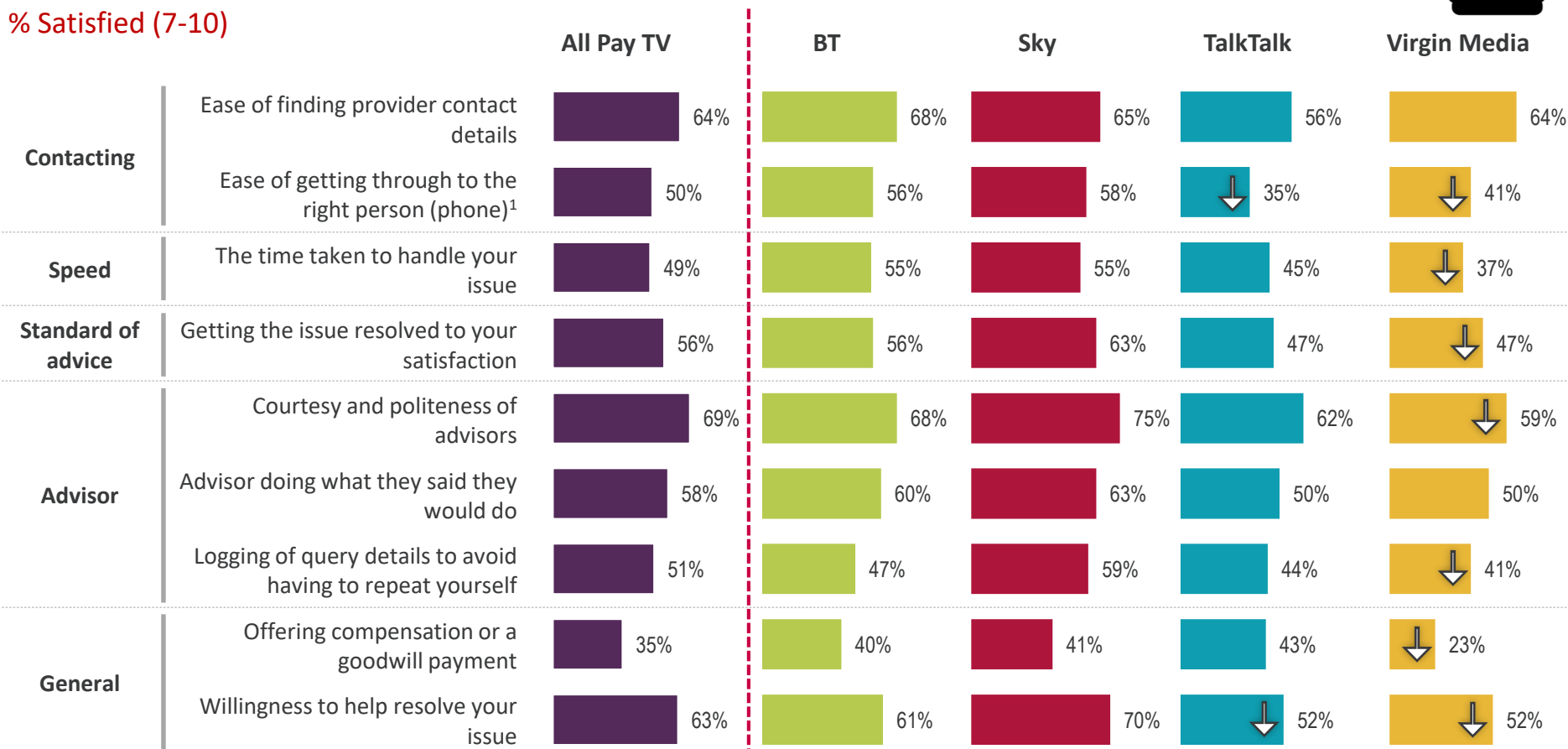


For *service issues* complaints, no provider was above average for satisfaction for any specific aspects of complaints handling; Virgin Media received below average for seven specific aspects and TalkTalk for two.

Satisfaction with specific aspects

Pay TV complaints – Service Issues

% Satisfied (7-10)



Source: Ofcom Quality of customer service – complaints research, online survey, fieldwork carried out by BDRG, 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 Pay TV service in past 6 months – Service Issues (582), BT (114), Sky (169), TalkTalk (108), Virgin Media (191).

↑ ↓ Indicates significantly higher/lower than the sector average at the 95% confidence level. * Caution: small base ** Base too small to chart

¹All contacting by phone (397/68*/115/54*/160)



For *service issues* complaints compared to 2016, no provider had an increase for satisfaction for any specific aspects of complaints handling; TalkTalk decreased for *all* aspects, while Virgin Media decreased for seven and BT for five.

Satisfaction with specific aspects

Pay TV complaints – Service Issues

% Satisfied (7-10)

YoY=2017%-2016%

		All Pay TV		BT		Sky		TalkTalk		Virgin Media	
		2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY
Contacting	Ease of finding provider contact details	64%	-2	68%	5	65%	1	56%	-14	64%	-6
	Ease of getting through to the right person (phone) ¹	50%	-4	56%	7	58%	-3	35%	-15	41%	-11
Speed	The time taken to handle your issue	49%	-16	55%	-19	55%	-6	45%	-30	37%	-17
Standard of advice	Getting the issue resolved to your satisfaction	56%	-13	56%	-25	63%	2	47%	-36	47%	-11
Advisor	Courtesy and politeness of advisors	69%	-2	68%	6	75%	-2	62%	-12	59%	-9
	Advisor doing what they said they would do	58%	-12	60%	-7	63%	-9	50%	-23	50%	-15
	Logging of query details to avoid having to repeat yourself	51%	-15	47%	-29	59%	0	44%	-30	41%	-20
General	Offering compensation or a goodwill payment	35%	-18	40%	-31	41%	0	43%	-34	23%	-13
	Willingness to help resolve your issue	63%	-8	61%	-20	70%	7	52%	-31	52%	-11

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 Pay TV service in past 6 months – Service Issues (582), BT (114), Sky (169), TalkTalk (108), Virgin Media (191).

Red or Green text indicates significantly lower/higher than 2016 at the 95% confidence level. * Caution: small base ** Base too small to chart

¹All contacting by phone (397/68*/115/54*/160)

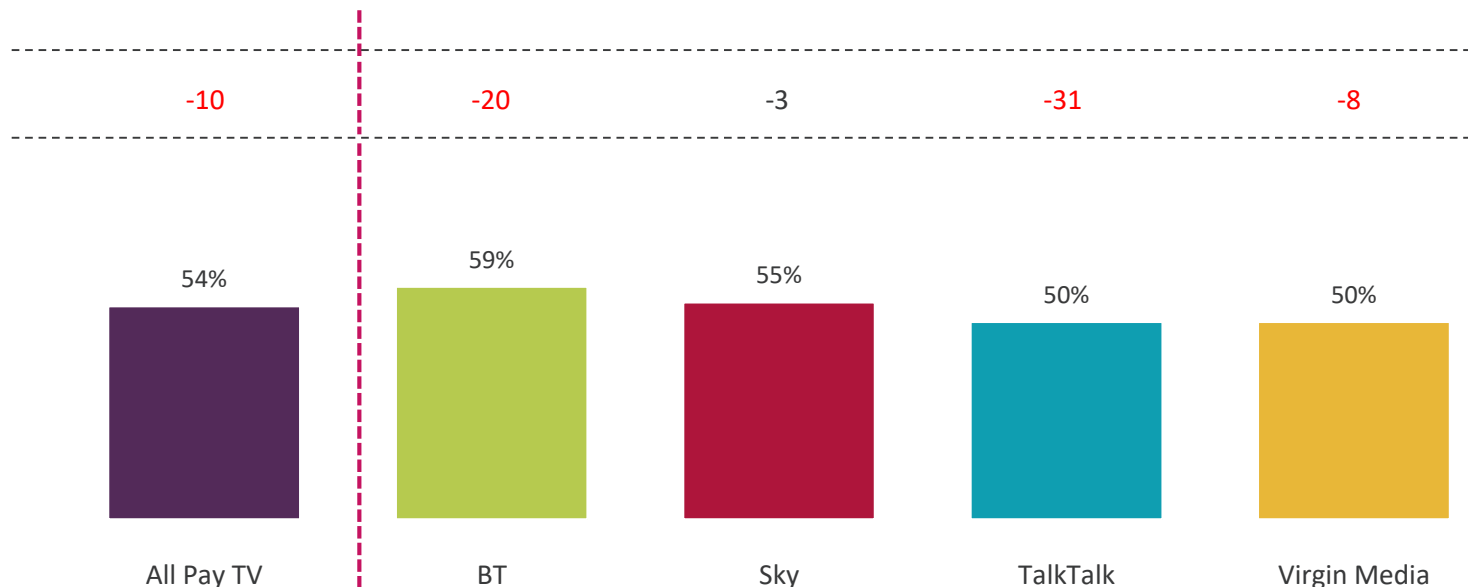


Overall, over half of pay TV complaints were completely resolved - a decrease since 2016. There were no differences by provider.

Proportion whose most recent complaint was completely resolved

Pay TV complaints % Completely Resolved

% points difference
2017 vs. 2016



❖ YoY = 2017% - 2016%

	2017	YoY	2017	YoY	2017	YoY	2017	YoY	2017	YoY
Billing/Customer Service	50%	-7	56%	-5	52%	-5	49%	**	44%	-10
Repairs/Installation	60%	-6	67%	-13	60%	-2	60%	**	54%	-16
Service Issues	53%	-17	53%	-31	54%	-2	42%↓	-49	52%	-7

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? Base: All who complained about the Pay TV service in past 6 months: 2016: All / Billing/Customer Service / Service Issues (2213/713/442/990), BT (507/82*/133/281), Sky (796/354/178/228), TalkTalk (332/45**/35**/244), Virgin Media (578/232/96*/237). 2017: All / Billing/Customer Service / Service Issues (1824/688/470/582), BT (368/117/129/114), Sky (639/289/142/169), TalkTalk (298/83*/96*/108), Virgin Media (519/199/103/191).



Indicates significantly higher/lower than the sector/complaint type average at the 95% confidence level. **Red text** Indicates significantly lower than 2016 at the 95% confidence level.

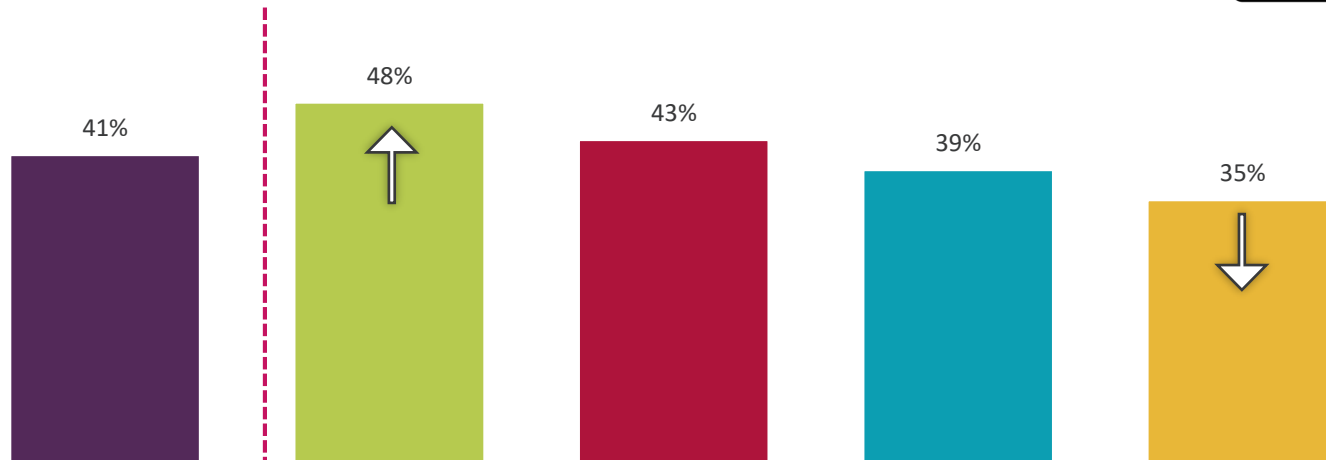
Green text Indicates significantly higher than 2016 at the 95% confidence level

Overall, two in five pay TV complaints were resolved on first contact; higher for BT and lower for Virgin Media.



Proportion where complaint was resolved on first contact

Pay TV complaints % resolved 1st contact



Complaint type:

Complaint type	All Pay TV	BT	Sky	TalkTalk	Virgin Media
Billing/Customer Service	38%	41%	39%	36%	33%
Repairs/Installation	50%	61%	52%	48%	41%
Service Issues	38%	40%	41%	31%	32%

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

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 Pay TV service in past 6 months: 2017: All / Billing/Customer Service / Service Issues (1824/688/470/582), BT (368/117/129/114), Sky (639/289/142/169), TalkTalk (298/83*/96*/108), Virgin Media (519/199/103/191).