



# Summary

## Service quality matters

Communications services such as our home phone, mobile and broadband, help to keep us entertained, stay in touch with friends and family and make everyday tasks easier. But when they go wrong it can be inconvenient, disruptive and expensive. This means it's vital that communications providers deliver reliable services, and offer proper support when things aren't working.

Shining a light on customers' experiences means people can easily compare the service quality available. It allows them to look beyond the price and get a much richer picture of what they can expect from different companies. It also gives providers a clear incentive to improve their service quality.

This report looks at how well the larger providers did in 2017<sup>1</sup>, based on information from consumers and industry.

## Mobile phones

### **Overall, the vast majority of mobile phone customers were satisfied with their service**

When asked, just over nine in ten mobile customers said they were satisfied with their service overall; which has not changed since 2016.

A small minority (4%) had a reason to complain. When they did, the main cause was that their service was not performing as it should be, followed by a billing, pricing or payment issue. Over half of mobile customers (56%) who complained to their provider were satisfied with how their complaint was handled, which was in line with 2016.

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<sup>1</sup> The fieldwork for the customer satisfaction and recommend to a friend market research was conducted between 5 January and February 2018.

## Of the main mobile providers, giffgaff and Tesco Mobile scored highly for customer satisfaction

The two mobile providers that ranked higher than average for overall customer satisfaction were giffgaff and Tesco Mobile; while Virgin Mobile and Vodafone both ranked lower than average.



## Customers of giffgaff and Tesco Mobile were more likely to say they would recommend their provider

When asked, giffgaff and Tesco Mobile customers were more likely than average to say they would recommend their provider to a friend.<sup>2</sup> In contrast, Virgin Mobile and Vodafone customers were less likely to say they would do so.

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

## Home broadband

Fast broadband has become essential for day-to-day activities such as business, entertainment and socialising. The amount of data residential broadband customers used per line last year grew by 44%.

Average download speeds have also been rising sharply in recent years. The main reason for this has been the growth in take-up of superfast broadband packages.

However, although superfast broadband is now available to 93% of premises, around two in five still use standard broadband. This is reflected in the slower speeds that some households receive. Most homes on standard broadband packages could receive faster speeds if they upgraded to faster broadband packages.

<sup>2</sup> Net Promoter Score™ (NPS™), see Annex 2 for further details on how this metric is calculated. The average ‘recommend to a friend’ score in the mobile market was good (22). Giffgaff and Tesco Mobile had “excellent” scores, while all other mobile providers had “good” scores.

## Broadband customers' overall satisfaction has fallen since 2016

Eight in ten broadband customers were satisfied with their service overall, down from just less than nine in ten in 2016. Customers highlighted that their dissatisfaction was mainly due to unreliable broadband connections and slow speeds.

TalkTalk's broadband customers were less satisfied than average with their service overall.<sup>3</sup>


## Customers on faster broadband packages were more satisfied with the speed they received

Broadband customers' satisfaction with the speeds they received has fallen compared to 2016, (from 83% to 77%), however those on faster broadband packages were more satisfied than those on standard broadband packages.

Virgin Media was the only provider with above average customer satisfaction with broadband speeds.

## Virgin Media broadband customers were more likely to recommend their provider

When asked, Virgin Media's customers were more likely than average to say they would recommend their provider to a friend.<sup>4</sup> TalkTalk's customers were less likely to say they would do so.

Recommend to a friend: Broadband providers	
More likely to recommend	Virgin Media 
Broadband average	BT · EE Plusnet · Sky
Less likely to recommend	TalkTalk

## There has been a rise in the proportion of broadband customers with a reason to complain

One in seven broadband customers had a reason to complain in 2017, (a rise from 13% in 2016 to 15%). By far the most common cause was a slow and patchy connection. At 18%, TalkTalk customers were more likely than average to have had a reason to complain.

<sup>3</sup> All other providers' scores were in line with the average.

<sup>4</sup> The average 'recommend to a friend' score in the broadband market was good (6). Virgin Media's score was 15, while TalkTalk's was -13.

## Broadband providers need to improve their handling of complaints

Broadband customers' satisfaction with their how their complaints were handled fell in 2017 (from 56% to 50%). In particular, people were less happy with how their complaints about broadband service quality issues, such as slow broadband speeds, were handled.

### EE and Sky had high customer satisfaction with complaints handling<sup>5</sup>

There were differences in satisfaction with how broadband providers handled complaints. Almost three-fifths of EE and Sky customers said they were satisfied, but only two-fifths of TalkTalk's customers were satisfied.

## Satisfaction with how complaint was handled

Above average:

EE (59%)  
Sky (57%)



Below average:

TalkTalk (40%)

### On average, EE broadband customers had the shortest wait to speak to their provider on the phone

The average time broadband customers had to wait to speak to their provider on the phone varied widely. Of the largest broadband providers, EE customers had the shortest wait time (48 seconds on average). Plusnet's customers had the longest wait, of just under eight minutes.

## Average call waiting time

Longest:  
Plusnet  
(7 min 50 sec)



Shortest:  
EE  
(48 sec)

### Most home phone and broadband orders were installed within 13 calendar days, but a small minority took more than four weeks

The majority of new landline and broadband orders were delivered by the date agreed with the customer, including any rearrangements agreed in advance. On average, new services were delivered by the main providers within 13 calendar days.<sup>6</sup> However, a small minority of orders (less than 6%) took more than four weeks to be delivered. Sometimes long installation times are due to factors outside providers' control; for example, where permission to conduct street works is required, or right of way needs to be agreed to install equipment on private land.

<sup>5</sup> Compared to the average.

<sup>6</sup> The time taken to deliver a new order depends on the type of order and network used, see main report for details.

## BT and Post Office (broadband) have prioritised service quality by paying for quicker repairs than other providers on the Openreach network

Where service issues are caused by network faults<sup>7</sup>, providers need to ensure they are fixed quickly. If providers using Openreach identify a network fault, they rely on Openreach engineers to fix the problem. How quickly that fault is fixed depends in part on which Openreach service level the provider buys.

In 2017, BT and the Post Office (broadband) were the only providers that paid for Openreach to fix faults within one working day for most of their customers. Most major providers on the Openreach network paid for repairs within two working days. Although Openreach does not fix every fault on time, BT and Post Office (broadband) customers will generally have their service fixed more quickly than other major providers on Openreach's network.

### Openreach repair level used for most residential customers (December 2017)

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

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

## Service problems can arise in the home, as well as on the network

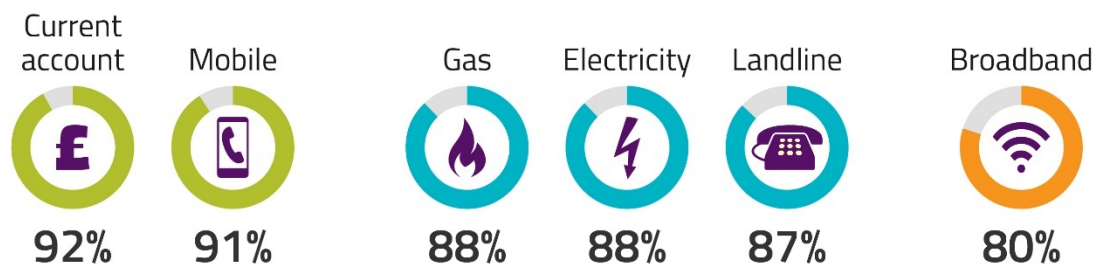
If diagnosed correctly, problems in the home can often be resolved quickly by providers through effective customer support. Consumers can also use Ofcom's [broadband checker app](#) to test their broadband connection and get tips on how to improve it. We have also published new [guides](#) on how consumers can improve their broadband speeds.

## Comparison with other sectors

Overall satisfaction among mobile customers was in line with that among current account customers, and above gas, electricity and landline customers. However, satisfaction among broadband customers was below all of these other sectors.

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<sup>7</sup> We estimate that these faults occur approximately every 8 to 9 years for lines carrying standard broadband services, once every 12 years for landline-only services, and once every 7 years for line carrying superfast broadband services.



## How Ofcom is working to improve service quality in the communications sector

This report is just one element of Ofcom's plan to improve service quality, which also includes:

- introducing automatic compensation for slow repairs, missed appointments and delayed installations from March 2019;
- improving the Broadband Speeds Codes of Practice, to give new customers more accurate speeds information and a stronger right to exit if their speed falls below the minimum guaranteed level from March 2019;
- strengthening the rules on complaints handling to ensure that providers deal with complaints from consumers promptly and effectively, from October 2018;
- setting tougher quality of service standards for Openreach to install new lines and fix faults more quickly. These came into effect on 1 April 2018;
- setting wholesale price controls that strengthen Openreach's incentives to make long-term investments in service quality. These came into effect on 1 April 2018; and
- supporting the rollout of competing full-fibre networks, which will enable faster speeds and provide a more reliable service. In addition, the broadband USO will help improve speeds for those who currently get less than 10 Mbit/s.