A2. Consumer research sources

A2.1   This annex sets out the scope and methodologies for the main sources of consumer research Ofcom has drawn on for our analysis in this service quality report.

Comparing Service Quality research 2018: Complaints handling

A2.2   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 has 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 handling 2016 and 2017 research but is not comparable with quality of customer service research conducted by Ofcom prior to 2016.

A2.3   The core aim of this study is to monitor satisfaction with customer service provided among customers who have made complaints to their provider in the last six months. The research was conducted via an online panel sample among a representative sample of 6,700 UK adults, aged 16+. Fieldwork took place from 5 December 2018 to 14 January 2019. As such, the last six months refers to the six months prior to fieldwork (i.e. June 2018 – January 2019).

A2.4   As with the previous quality of customer service research, this research includes UK communications providers with a market share of 4% or more (Q2 2018). The data is presented at both a total sector level and at a provider level. Total sector level data is weighted to be representative of the UK as a whole, and provider level data is unweighted. The provider level data is therefore representative of customers of the provider with a complaint in the six months prior to fieldwork and who are online.

A2.5   In the report, when we use the term sector "average" we are referring to the average of the providers included in the study (see report for providers included).

A2.6   For the full chart pack, see Comparing Service Quality research 2018: Complaints handling.

A2.7   See Complaints handling tracker 2018: total market data tables for the total level data tables. For the provider level data tables, see Complaints handling tracker 2018: supplier level data tables.

Comparing Service Quality research 2018: Reason to complain

A2.8   Since 2009 Ofcom has been tracking the proportion of customers using a landline, broadband and mobile service who say they have had reason to complain about their provider in the previous 12 months. Pay TV was included for the first time in the 2016 wave of research. The 2018 research was conducted via a face to face omnibus among a representative sample of 6,399 UK adults, aged 16+. The fieldwork took place from 5

December – 16 December 2018 and, as such, data refers to the 12-month period December 2017 to December 2018.

A2.9   The specific objectives are: to explore whether consumers have had reason to complain about their landline, fixed broadband, mobile and/or pay TV provider in the last 12 months, and if so, what was the reason for the complaint. To explore whether customers with a reason to complain actually went on to make a complaint, if they did, who did they complain to, and if they did not go on to make a complaint, why not. And, where sample size allows, to split information within each sector by communications provider.

A2.10   Significance testing performed at the 95% confidence level and conducted using unrounded percentage values.

A2.11   The data are weighted to the national UK profile using target rim weights for gender, age, social class and grouped government region (North, Midlands, South).

A2.12   In the report, when we use the term sector "average" we are referring to the average of all providers in the relevant sector.

A2.13   See Comparing Service Quality research 2018: Reason to complain for the full chart pack.

A2.14   See Reason to complain 2019 data tables for the data tables.

Customer satisfaction tracker 2019

A2.15   The Customer satisfaction tracker is Ofcom's key data source on levels of satisfaction across the communications markets (landline, mobile, fixed broadband and pay TV). The aim of this study is to track and understand the attitudes of residential consumers (decision makers) to the quality of service they receive for each specific telecommunications service or product they purchase.

A2.16   The study is designed to report on satisfaction at an overall level per market and by provider within market.

A2.17   Between 2010 and 2016 customer satisfaction levels across these communications markets were monitored via questions on Ofcom's annual Switching Tracker (face to face methodology). In 2018, we moved the questions to a bespoke tracking study and the data was collected through a face-to-face study, followed by an online study. The aim of the online approach was to increase the number of interviews achieved with customers of the smaller communications providers where less than 100 interviews were achieved on the initial face- to-face study.

A2.18   Fieldwork took place from 3 January to 6 February 2019. A total of 2,547 face-to-face, in-home interviews with telecoms decision makers aged 16+ were conducted, followed up by 831 online interviews with decision makers aged 16+. Quotas were set based on gender, age and socio-economic group. On completion of the interviews, weighting of the data is applied for each of the markets using profiles from our Communications Tracking Survey.

A2.19   More information about the methodology and weighting can be found in the technical note.

A2.20   Significance testing applied at the 95% confidence level for 2019 data and at the 99% confidence level year on year and conducted using unrounded percentage values.

A2.21   In the report, when we use the term "sector average" in relation to levels of customer satisfaction with the service provided we are referring to the average of all providers in the relevant sector.

A2.22   In the report we use the term 'Recommend to a friend' to show customer loyalty in the market. This measure is the Net Promoter ScoreTM (NPSTM). The NPSTM Calculation NPSTM is calculated by using the answer to a key question, using a 0-10 scale: Based on your overall experience of using (PROVIDER) for your (SECTOR) provider, how likely would you be to recommend them to a friend or family member as a (SECTOR) provider? Please give a rating on a scale of 0 to 10, where 0 is 'Extremely Unlikely' and 10 is 'Extremely Likely'? Respondents are grouped as follows: -Promoters (score 9-10) are loyal enthusiasts. -Passives (score 7-8) are satisfied but unenthusiastic customers. -Detractors (score 0-6) are unhappy customers. The NPSTM is calculated by subtracting the percentage of Detractors from the percentage of Promoters. The score can range from a low of -100 (if every customer is a Detractor) to a high of 100 (if every customer is a Promoter). Based on the global NPS standards, any score above 0 is considered "good", 50 and above is considered excellent and 70 and above is considered "world class".

A2.23   See Customer satisfaction tracker 2019 for the full chart pack.

A2.24   See Customer satisfaction tracker 2019 data tables for the data tables.