

# Customer Satisfaction Tracker 2019

## Summary of research findings

Produced by: Critical Research

Fieldwork: 3 January to 6 February 2019

# Section 1

## Background, objectives, methodology

# Background, objectives and methodology

## Background and objectives

The Customer Satisfaction Tracker is Ofcom's key data source on levels of overall 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 to the quality of service they receive for each service they purchase.

The study is designed to report on satisfaction at an overall level per market and by provider within market. The providers included in the research are listed below.

Fixed broadband	Fixed-line	Mobile	Pay TV
BT	BT	EE	BT
EE	EE	giffgaff	Sky
Plusnet	Plusnet	O2	TalkTalk
Sky	Sky	Tesco Mobile	Virgin Media
TalkTalk	TalkTalk	Three	
Virgin Media	Virgin Media	Virgin Mobile	
		Vodafone	

Questions are asked upfront to establish household ownership of landline, mobile phone, fixed broadband and pay TV. For each of these services the questionnaire established whether the respondent is the decision maker and whether any of the household's services are taken from the same provider. Customers who are decision makers for and take more than one of the communication services from the same provider are referred to as bundle customers. Those that take a particular service outside of a bundle are referred to as standalone customers for that service.

# 4

## Background, objectives and methodology/2

### Background and objectives

Between 2010 and 2016 customer satisfaction levels across these communications markets were monitored via questions on Ofcom's annual Switching Tracker. Since 2018, the data was collected through a face-to-face study (replicating the approach of the Switching Tracker), followed by an online element. The aim of the additional online element 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.

On completion of all interviewing, again replicating the approach of the Switching Tracker, the data was weighted to each of the service types using profiles from Ofcom's Technology Tracker Survey and also to correct for any differences in the method of interviewing. More information about weighting approach can be found here [https://www.ofcom.org.uk/data/assets/pdf\\_file/0027/145809/customer-satisfaction-tracker-2019-technical-report.pdf](https://www.ofcom.org.uk/data/assets/pdf_file/0027/145809/customer-satisfaction-tracker-2019-technical-report.pdf)

Data tables can be found here: [https://www.ofcom.org.uk/data/assets/pdf\\_file/0018/141345/cs-tracker-data-table-2019.pdf](https://www.ofcom.org.uk/data/assets/pdf_file/0018/141345/cs-tracker-data-table-2019.pdf)

# Background, objectives and methodology/3

## Methodology

### Sample

- 2,547 face to face, in home interviews with adults aged 16+
- 831 online interviews with adults aged 16+ using a research panel (502 interviews with a representative sample of internet users and 329 interviews with those who took certain services with particular providers)
- Quotas set based on gender, age and socio-economic group

### Data collection

- Conducted by Critical Research
- Fieldwork from 3rd January to 6<sup>th</sup> February 2019

### Data reporting




- Weighted within market, based on profiles from Ofcom's Technology Tracker and due to the multi-modal approach. More information about the weighting approach can be found in the technical note
- Significance testing applied at the 95% level (within year) or 99% confidence level (between 2018 and 2019)

# Background, objectives, methodology /4

## Significance testing

Throughout the chart pack, where it is possible to do so, statistically significant differences are flagged over time (at the 99% confidence level) and are indicated by the following symbols where: ▲ shows a significant increase over time and ▼ shows a significant decrease.

In the market specific charts (from slide 18), statistically significant differences are also flagged comparing results for a particular provider to the average for that market (at the 95% confidence level).

The market average score is always shown outlined in black  , a measure that is higher than average is outlined in green  and a lower than average measure is outlined in red 

On some charts (i.e. those showing the Net Promoter Scores™ and when making comparisons between urban and rural areas) these symbols ▲ ▼ may also be used to flag significant differences. In these instances there is an accompanying explanation on the chart or in the chart footer.

If a finding is not statistically significant it may be referenced as being unchanged or that it does not differ/ vary when compared to another measure. In some instances, the two percentages compared could differ by as much as 15 percentage points, but due to relatively low base sizes for one (or both) of these groups the difference is not registering as statistically significant.

The charts showing Net Promoter Scores™ have been tested for statistical significance and potentially some results could have differed to those shown in the data tables. This is because the significance testing in the data tables is based on treating the NPS™ as a continuous variable, whereas in fact it is a variable with discrete values. As a result the standard errors tend to be overestimated, and the significance underestimated.

## Section 2

# Satisfaction with communications services- service comparison

## Summary – service comparison

At least four in five customers say they are satisfied overall with the service from their communications provider

- Satisfaction is highest for mobile (93%) and lowest for broadband (83%)
- Compared to 2018, satisfaction is unchanged for mobile (93%), landline (86%), broadband (83%), pay TV (88%) and among those taking more than one service from the same provider (bundle customers) (86%)
- Unreliable connections and slow speeds are the main reasons given for dissatisfaction with broadband services
- Unreliable connections and value for money are the main reasons for dissatisfaction with landline and pay TV services
- Poor reception/coverage is the main reason for dissatisfaction with mobile phone services

Compared to 2018, satisfaction with the reliability of landline, broadband and pay TV services is unchanged and is higher for mobile services

- Mobile customers (87% vs. 84% in 2018)
- Landline customers (90%)
- Pay TV customers (90%)
- Broadband customers (83%)
- Satisfaction with reception/ signal strength is lower in rural compared to urban areas among mobile and broadband customers



## Summary – service comparison/2

Overall satisfaction with current account provider is comparable to that for mobile phone provider and is higher than for pay TV, landline, bundle and broadband provider. Satisfaction with gas and electricity provider is lower than for mobile phone provider and higher than for broadband provider

- 94% for main current account provider, 93% for mobile provider
- 88% for pay TV provider, 87% for gas provider and 87% for electricity provider, 86% for landline provider and 86% for pay TV provider
- 83% for broadband provider

When asked to rate their likelihood to recommend their communications provider to friends and family (where 0 is extremely unlikely and 10 extremely likely), customers in each market are more likely to be 'Promoters' (give a score of 9-10) than they are to be 'Detractors' (give a score of 0-6)

- The Net Promoter Score™ – the difference between the proportion of Promoters and Detractors - is higher among mobile customers (30) than among pay TV (19), landline (16) or broadband (12) customers

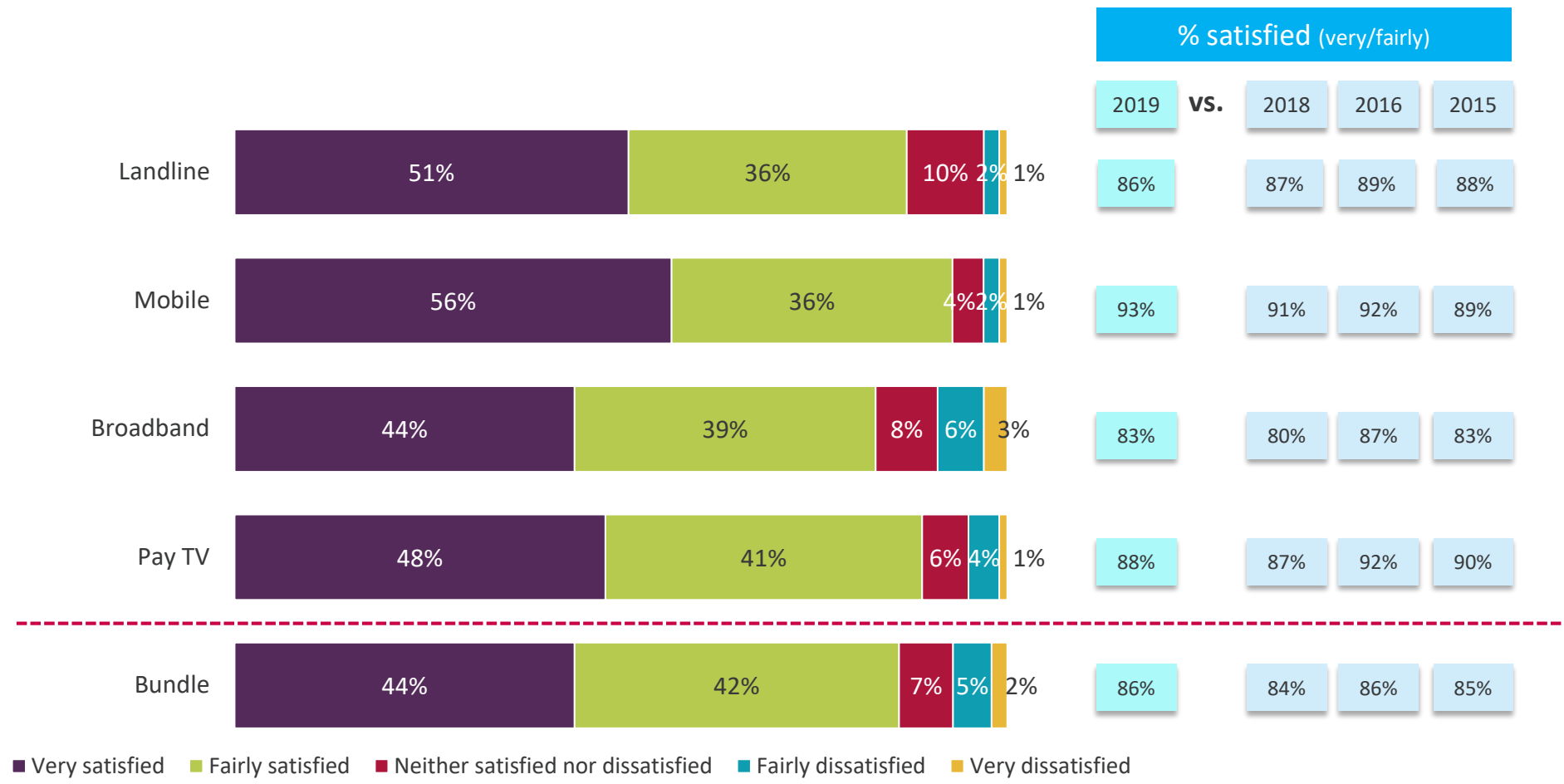
Satisfaction with value for money among pay TV customers has increased compared to 2018, although this follows a similar decrease between 2016 and 2018

- Pay TV customers (71% in 2019 vs. 58% in 2018 vs. 69% in 2016)



In 2019, overall satisfaction remains highest among mobile customers and lowest among broadband customers. Satisfaction with the service provided is unchanged since 2018 for landline, fixed broadband, mobile, pay TV and bundle customers.

Overall satisfaction with services from communications provider – total market



Source: Ofcom Customer Satisfaction Tracker survey 2019  
 L1/M2/IN2/PT1/B1: In terms of your (SERVICE) how satisfied are you with the overall service provided by (PROVIDER)? Would you say you are...  
 Base: All adults aged 16+ who are the decision maker and express an opinion on their landline service (2404), their mobile phone service (3078), their fixed broadband service (2395), their pay TV service (1575), their services taken with the same supplier (2271). 'Don't know' responses have been excluded from the base.

Main reasons for dissatisfaction with broadband are poor/unreliable connection and slow speeds. For landline and pay TV, the main reasons are unreliable connections and poor value for money. Poor reception/coverage is the main reason for dissatisfaction with mobile services.

Reasons for dissatisfaction with overall service from communications provider – Top five mentions per service type

	Broadband (9% dissatisfied)		Pay TV (5% dissatisfied)		Landline (4% dissatisfied)		Mobile (3% dissatisfied)	
Base	219		85**		99**		102	
Service I take from them is poor/bad connection/doesn't work some of the time/unreliable	55%	1	20%	2	46%	1		
Speed isn't as advertised/slow	47%	2						
Too expensive/not good value for money	15%	3	36%	1	24%	2	16%	3
Poor customer service/unhelpful	10%	4	14%	4	19%	3	10%	5
Problems left unresolved/takes too long to fix	5%	5			6%	5		
Poor TV reception			18%	3				
Problems with payment/billing					8%	4		
Poor reception/coverage (unspecified)							35%	1
Poor mobile reception/coverage – at home							11%	4
Poor mobile reception/coverage – in my area							18%	2
Too many repeats/ low quality programming/ too many channels/ poor selection of channels/not enough new content			13%	5				

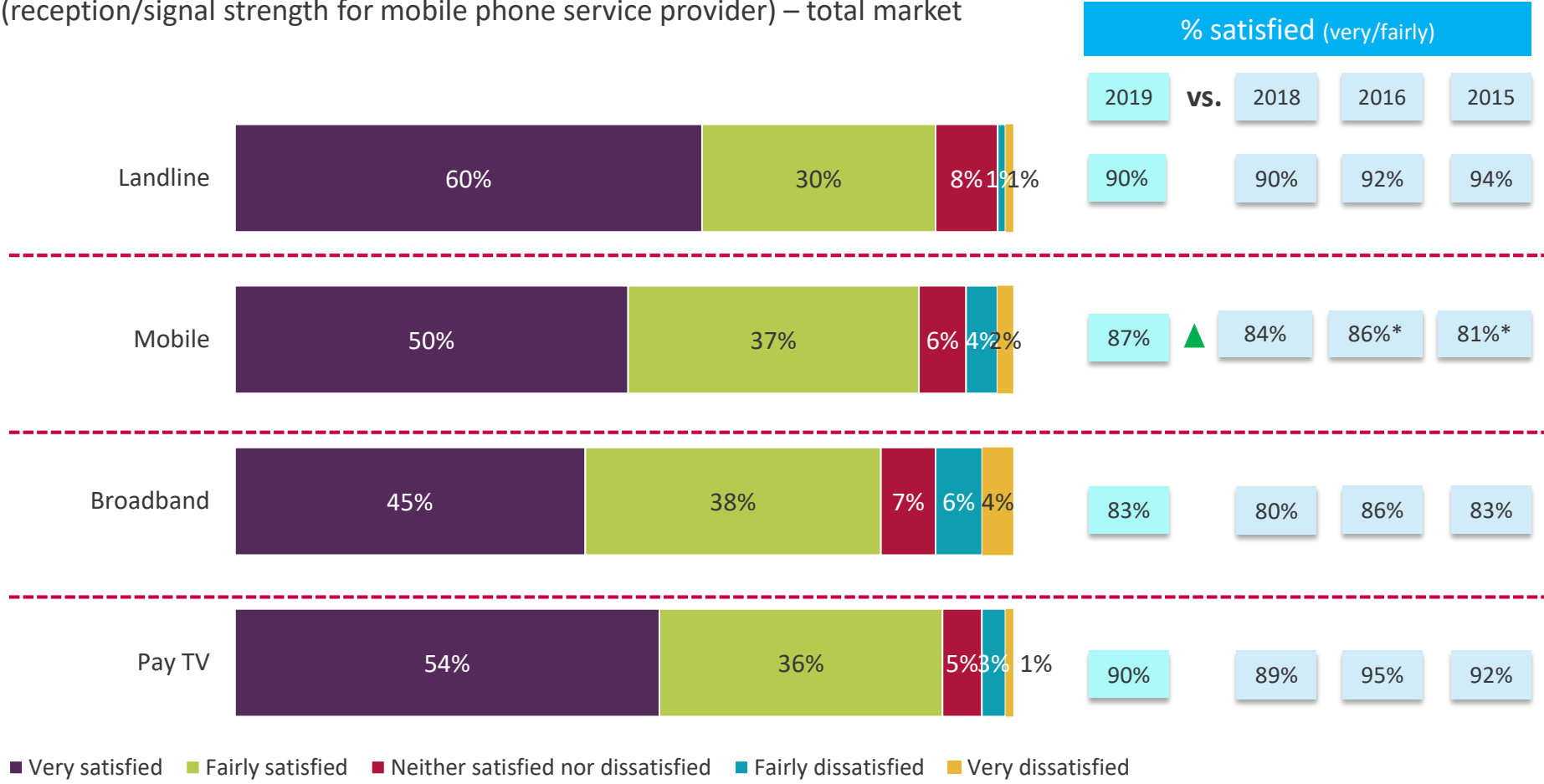
Source: Ofcom Customer Satisfaction Tracker survey 2019

D1/D2/D3/D4: You said earlier you were dissatisfied with the overall service from your landline provider/ mobile phone service provider/ fixed broadband provider/ pay TV provider. Why do you say that ?

Base: All adults aged 16+ who are the decision maker who say they are dissatisfied with the overall service from their provider (Bases shown in the table). \*\* Findings are indicative only - base under 100 interviews

Overall satisfaction with service reliability is unchanged compared to 2018 in the landline, broadband and pay TV markets. Satisfaction is higher compared to 2018 among mobile phone customers.

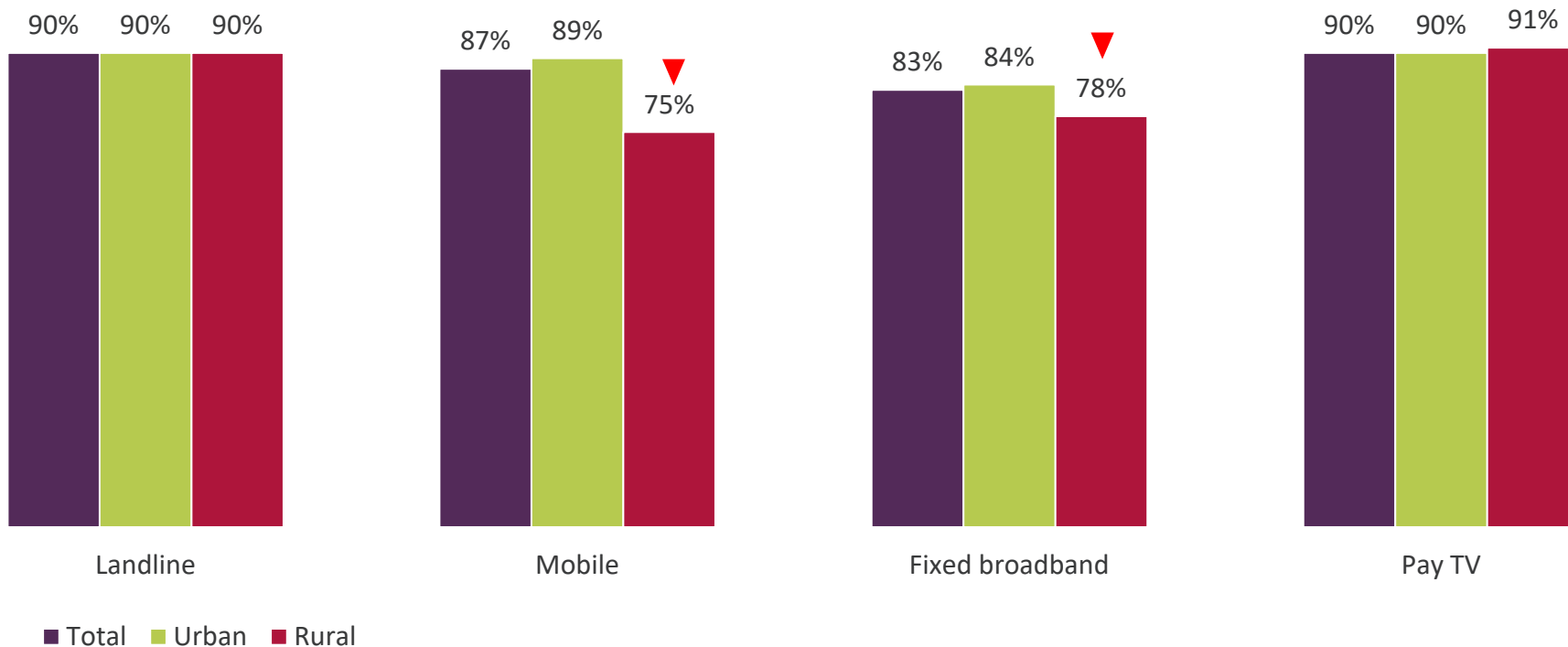
Satisfaction with reliability of service from communications provider (reception/signal strength for mobile phone service provider) – total market



Source: Ofcom Customer Satisfaction Tracker survey 2019  
 L3/IN5/PT3: And how satisfied are you with the reliability of your landline/ fixed broadband/ pay TV service from (PROVIDER)? / M4: And how satisfied are you overall with the reception or signal strength that you get on your mobile phone service from (PROVIDER)? Would you say you are...  
 Base: All adults aged 16+ who are the decision maker who express an opinion on their landline service (2383), mobile phone service (3079), fixed broadband service (2395), pay TV service (1573). 'Don't know ' responses have been excluded from the base. \* Before 2018 respondents were asked about the reception or ease of accessing the (PROVIDER) network

## Satisfaction with reception/signal strength among mobile and broadband customers is lower in rural areas compared to urban areas.

% satisfied with reliability of service from communications provider (reception/ signal strength for mobile phone service provider) – by location



Source: Ofcom Customer Satisfaction Tracker survey 2019

L3/IN5/PT3: And how satisfied are you with the reliability of your landline/ fixed broadband/ pay TV service from (PROVIDER)? / M4: And how satisfied are you overall with the reception or signal strength that you get on your mobile phone service from (PROVIDER)? Would you say you are...

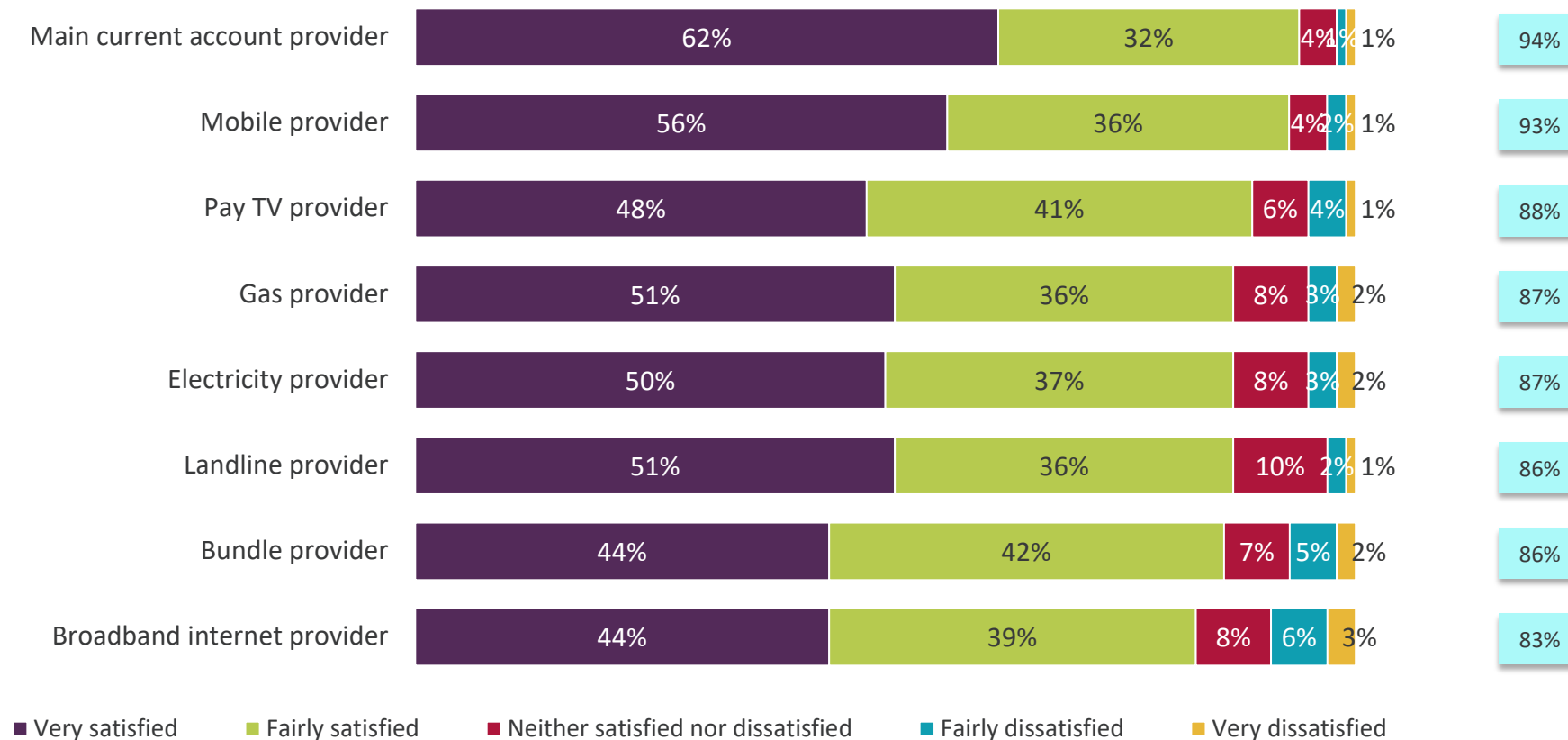
Base: All adults aged 16+ who are the decision maker who express an opinion on their landline service (2383 total, 2021 urban, 355 rural), mobile phone service (3079 total, 2640 urban, 432 rural), fixed broadband service (2395 total, 2065 urban, 322 rural), pay TV service (1573 total, 1365 urban, 201 rural).

Significance testing shows any difference (at the 95% level) between customers in urban and rural areas.

Overall satisfaction with current account provider is higher than for pay TV, landline, bundle and broadband provider. Satisfaction with gas and electricity provider is lower than for mobile provider and higher than for broadband provider.

Overall satisfaction with services from communications provider – benchmark with other providers (utility and current account provider)

% satisfied  
(very/fairly)



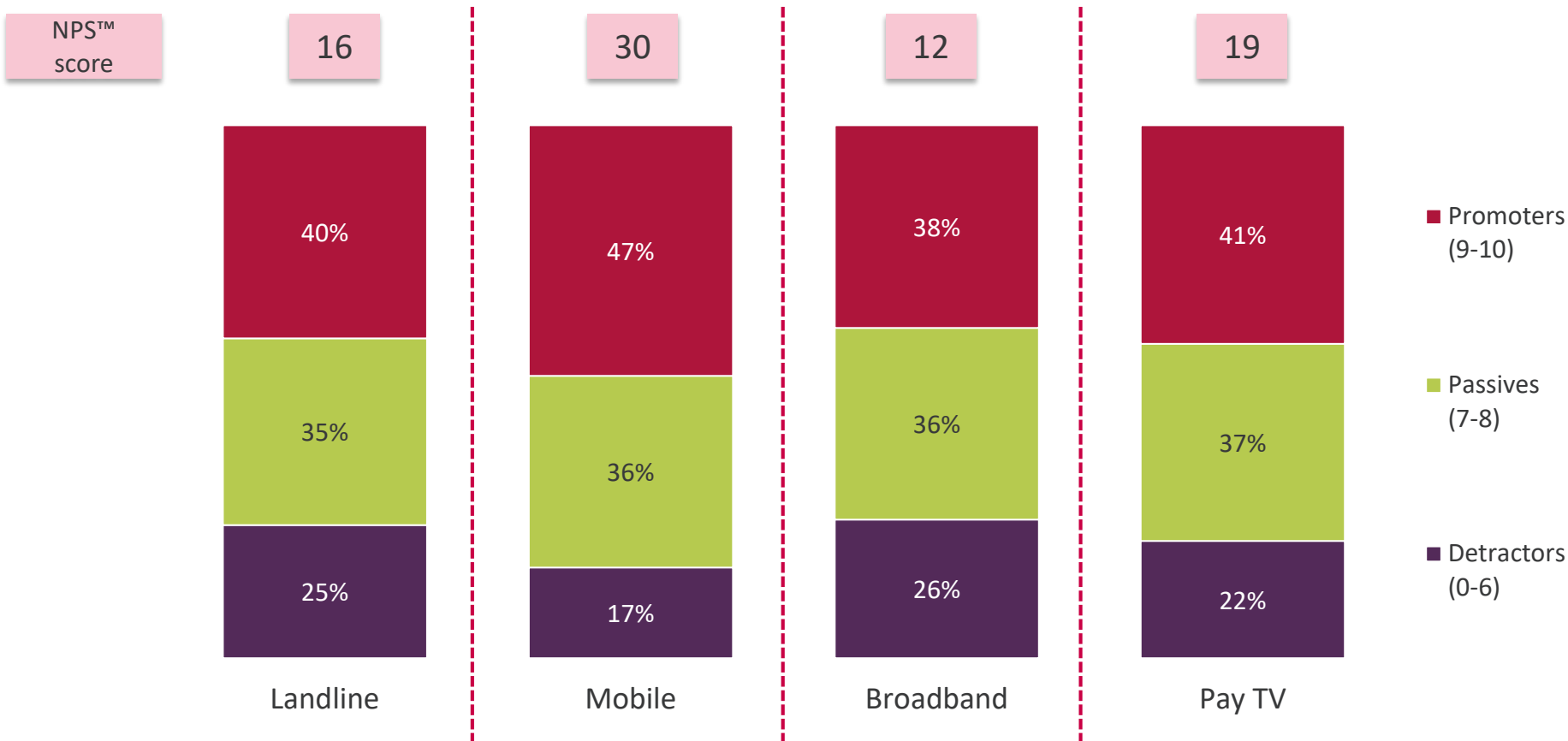
Source: Ofcom Customer Satisfaction Tracker survey 2019

L1/M2/IN2/PT1/B1/BM3/BM8/BM10: In terms of your (SERVICE) how satisfied are you with the overall service provided by (PROVIDER)? Would you say you are...

Base: All adults aged 16+ who are the decision maker and express an opinion on their landline service(2404), their mobile phone service (3078), their fixed broadband service (2395), their pay TV service (1575), their services taken with the same supplier (2271), their main current account provider (3004), their gas provider (2331), their electricity provider (2699). 'Don't know' responses have been excluded from the base.

For each market, customers are more likely to be 'Promoters' than 'Detractors'.  
NPS™ is higher for mobile than for the other markets.

Net Promoter score (NPS™) by service type, total market



Source: Ofcom Customer Satisfaction Tracker survey 2019

QN1/ QN2/ QN3/ QN4: Based on your overall experience of using (PROVIDER) for your landline service/ as your mobile phone service provider/ as your fixed broadband provider/ as your pay TV provider, how likely would you be to recommend them to a friend or family member as a (SERVICE) provider? Please give a rating on a scale of 0 to 10, where 0 is 'Extremely Unlikely' and 10 is 'Extremely Likely'?

Base: All adults aged 16+ who are the decision maker and express an opinion on their landline service(2466), their mobile phone service (3082), their fixed broadband service (2399), their pay TV service (1576).

‘Cost’ is the main reason given by customers for not recommending their landline, pay TV or mobile service. However, in addition to ‘cost’, ‘unreliable connections’ are common responses for not recommending their broadband service.

Reasons for not recommending provider\* among those that are not dissatisfied with their service from communications provider – Top five mentions per service type

\* By giving a NPS™ score of four or lower

	Landline (5% would not recommend and are not dissatisfied)		Pay TV (4% would not recommend and are not dissatisfied)		Broadband (4% would not recommend and are not dissatisfied)		Mobile (3% would not recommend and are not dissatisfied)	
Base	123		68**		105		88**	
Too expensive/ not good value for money	26%	1	43%	1	27%	2	21%	1
Service I take from them is poor/bad connection/ doesn't work some of the time/ unreliable	20%	3	9%	3	28%	1		
I do not recommend/ I don't use it enough/ know enough to recommend	21%	2	8%	4			16%	3
Poor customer service/ unhelpful	6%	4	9%	2	15%	4	11%	4
Have to pay for something I don't use/ have to have a landline	4%	5						
Problems left unresolved/takes a long time to fix					5%	5		
Too many repeats/low quality programming/too many channels/poor selection of channels/not enough new content			7%	5				
Speed isn't as advertised/ slow					19%	3		
Poor reception/ coverage (unspecified)							16%	2
They offer poor deals/I have seen better deals elsewhere							10%	5

Source: Ofcom Customer Satisfaction Tracker survey 2019

QN5/QN6/QN7/QN8: Why would you not particularly recommend (PROVIDER) as a landline/mobile phone service/broadband/ pay TV provider?

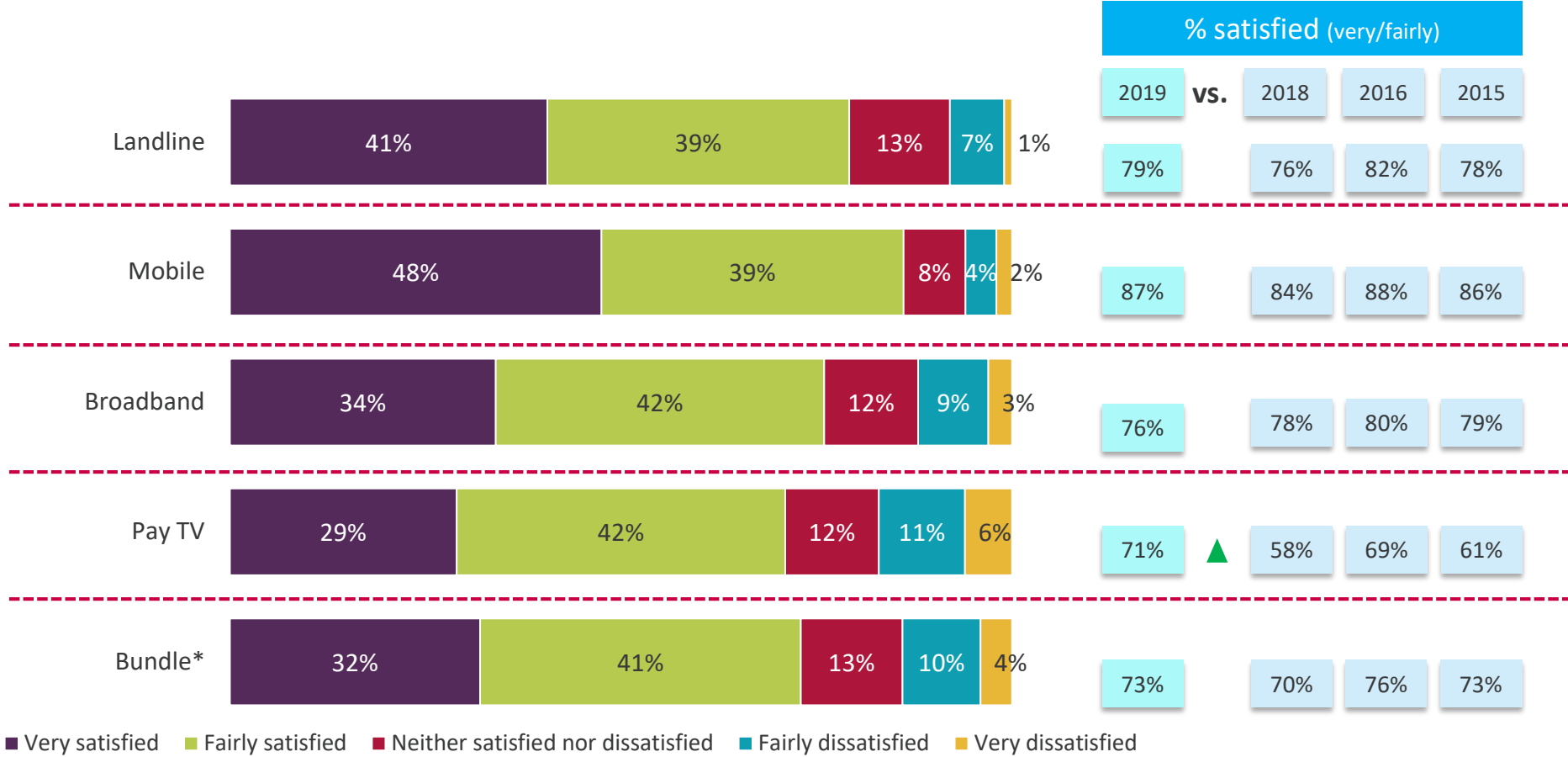
Base: All adults aged 16+ who are the decision maker for that particular service who do not say they are dissatisfied with the overall service from their provider but who would not recommend\* their service provider (Bases shown in the table). \* By giving a Net Promoter Score (NPS™) of four or lower.

\*\* Findings are indicative only - base under 100 interviews



In the last year, satisfaction with value for money has increased among standalone customers for mobile and pay TV customers, following a corresponding decrease between 2016 and 2018.

Satisfaction with value for money from communications provider – standalone service and bundle customers



\*Those with each service on a standalone basis were asked about the value for money of that particular service. As bundle customers receive one bill/ make one payment they were asked instead about the value for money of the service from their bundle provider.

Source: Ofcom Customer Satisfaction Tracker survey 2019  
 L2/M3/IN3/PT2/B2: And how satisfied are you with the overall value for money of your service from (PROVIDER)? Would you say you are...  
 Base: All adults aged 16+ who are the decision maker who express an opinion on their landline service (349), mobile phone service (2642), fixed broadband service (213), pay TV service (393) where it is held as a standalone service/ not taken with another service from the same provider and among those who take more than one service from the same provider (2261) 'Don't know' responses have been excluded from the base.

# Section 3

## Fixed Broadband

## Summary – fixed broadband

More than four in five (83%) customers are satisfied overall with their fixed broadband service, unchanged since 2018

- TalkTalk broadband customers are less satisfied than the market as a whole (79% vs. 83%)

Over four in five (83%) fixed broadband customers are satisfied with the reliability of their broadband service, unchanged since 2018

- TalkTalk customers are also less satisfied than average with this aspect of their broadband service (77% vs. 83%)

Four in five (80%) fixed broadband customers are satisfied with the speed of their broadband service while online, an increase since 2018 (77%)

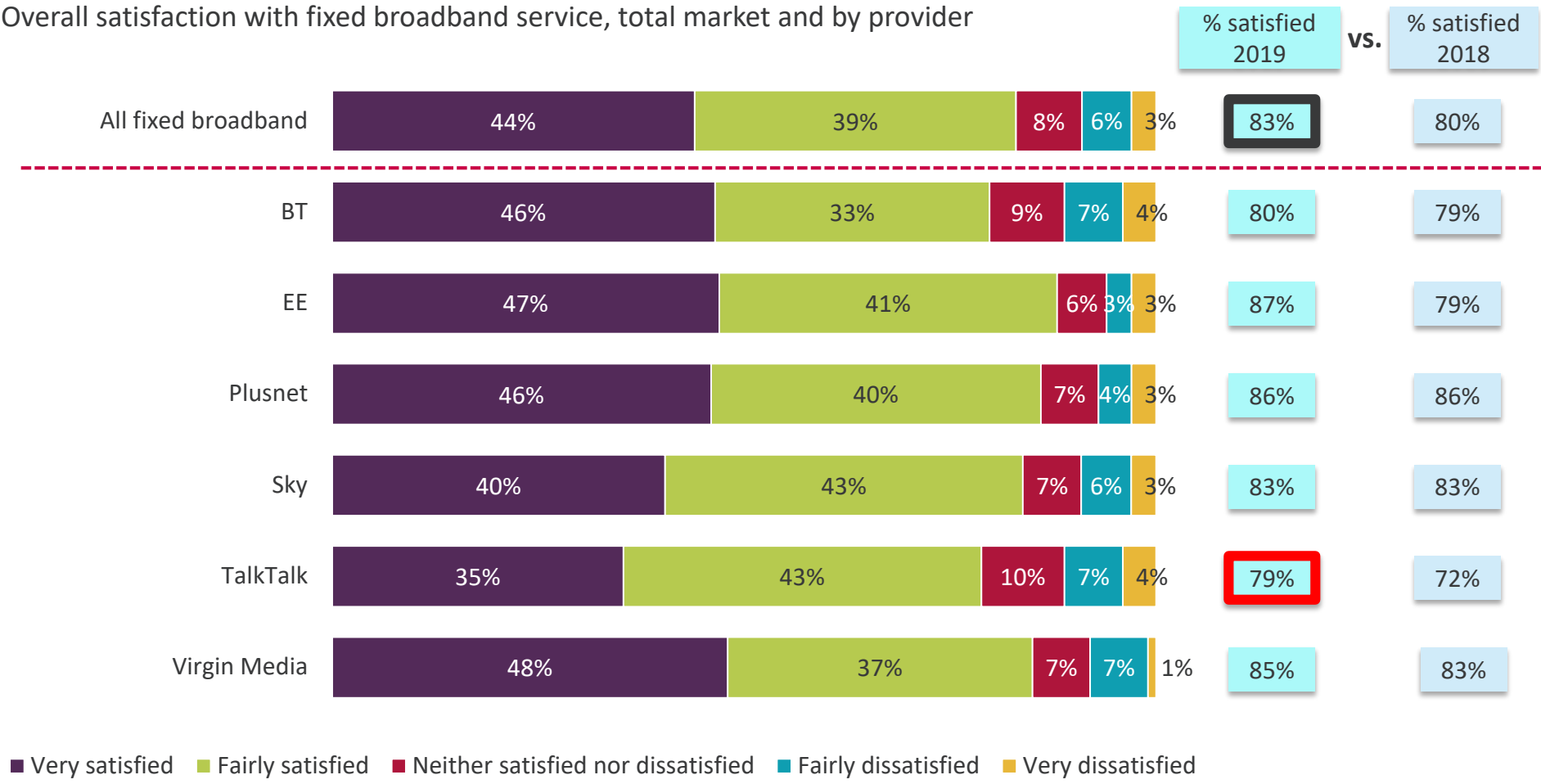
- Virgin Media (85%) customers have higher than average satisfaction with the speed of their broadband service, while TalkTalk customers satisfaction is lower (74%)

TalkTalk broadband customers have a Net Promoter Score™ that is lower than average

More than three quarters (76%) of standalone broadband customers say they are satisfied with the value for money of their service, comparable to 2018

Compared to 2018, overall satisfaction is unchanged for the market as a whole, and for each provider. TalkTalk broadband customers are less likely than average to be satisfied.

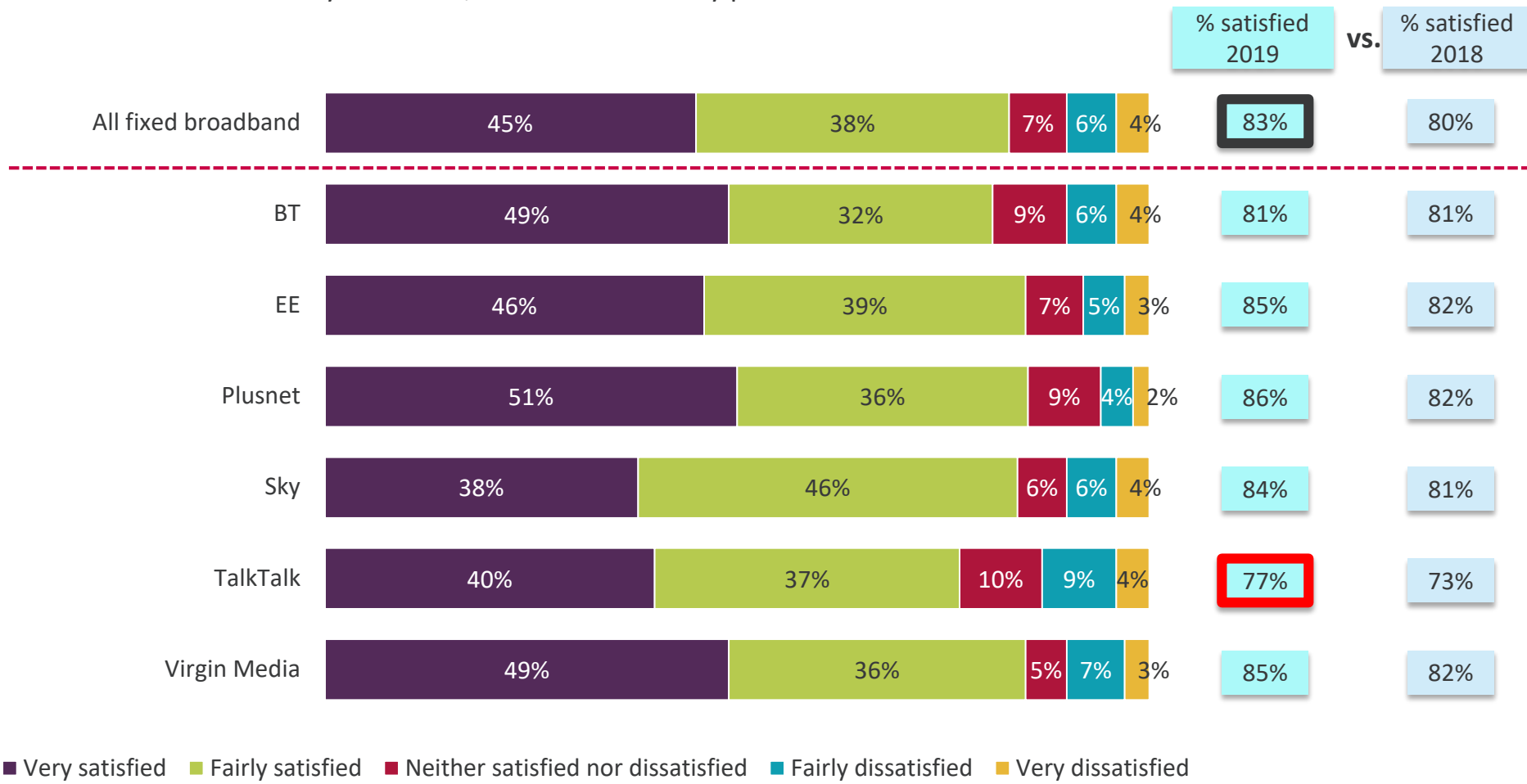
Overall satisfaction with fixed broadband service, total market and by provider



Source: Ofcom Customer Satisfaction Tracker survey 2019  
 IN2: In terms of your fixed broadband service, how satisfied are you with the overall service provided by (FIXED BROADBAND INTERNET PROVIDER)? Would you say you are...  
 Base: All adults aged 16+ who are the decision maker and express an opinion on their fixed broadband internet service (2395), receiving their service from BT (507), EE (136), Plusnet (124), Sky (602), TalkTalk (415), Virgin Media (448). Providers used by fewer than 100 respondents are not shown individually but are included in the total. 'Don't know' responses have been excluded from the base.

TalkTalk customers are less likely to be satisfied with the reliability of the service compared to the average for the fixed line broadband market. Compared to 2018, satisfaction with service reliability in the market as a whole and for each provider is unchanged.

Satisfaction with reliability of service, total market and by provider

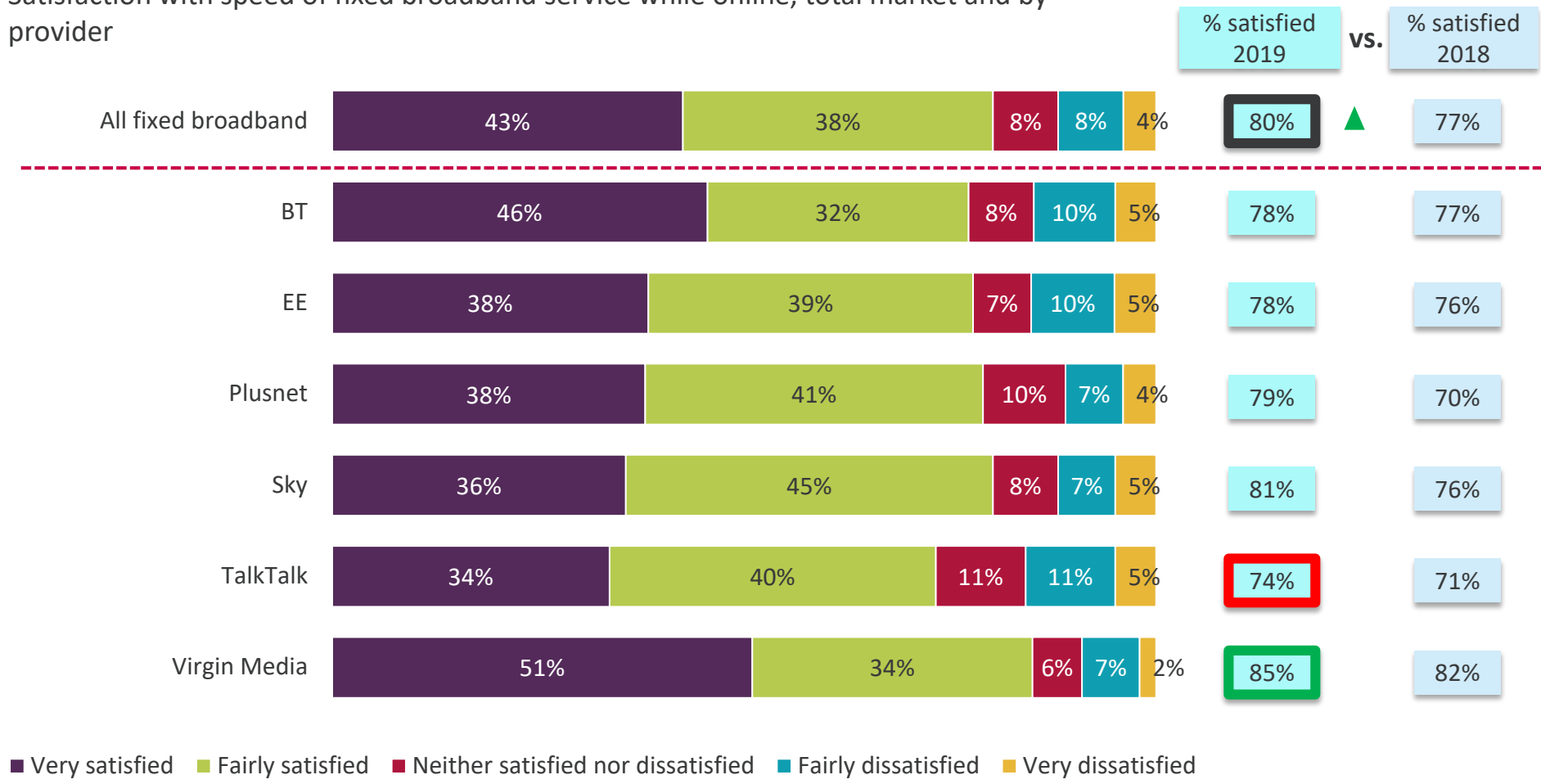


Source: Ofcom Customer Satisfaction Tracker survey 2019  
 IN5: And how satisfied are you with the reliability of your fixed broadband service from (FIXED BROADBAND PROVIDER)? Would you say you are...  
 Base: All adults aged 16+ who are the decision maker and express an opinion on their fixed broadband internet service (2395), receiving their service from BT (507) EE (136), Plusnet (124), Sky (603), TalkTalk (414), Virgin Media (447). Providers used by fewer than 100 respondents are not shown individually but are included in the total. 'Don't know' responses have been excluded from the base.



Four in five (80%) fixed broadband customers are satisfied with the speed of the service, an increase since 2018. Compared to this average, satisfaction is higher among Virgin Media customers (85%) and lower among TalkTalk customers (74%).

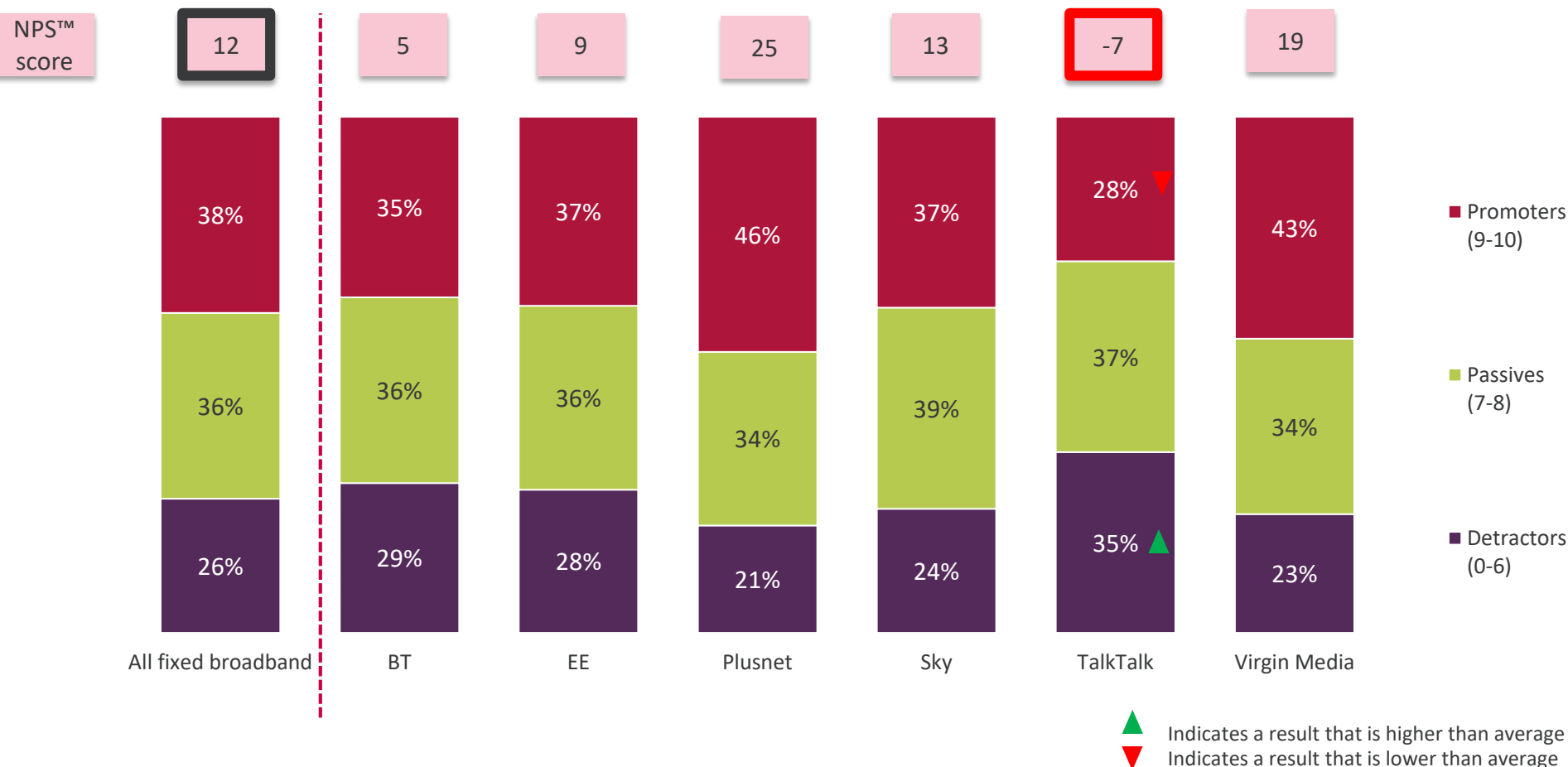
Satisfaction with speed of fixed broadband service while online, total market and by provider



Source: Ofcom Customer Satisfaction Tracker survey 2019  
 IN4: And how satisfied are you with the speed of service while online from (FIXED BROADBAND INTERNET PROVIDER)? Would you say you are...  
 Base: All adults aged 16+ who are the decision maker and express an opinion on their fixed broadband internet service (2387), receiving their service from BT (505) EE (136), Plusnet (125), Sky (600), TalkTalk (411), Virgin Media (447). Providers used by fewer than 100 respondents are not shown individually but are included in the total. 'Don't know' responses have been excluded from the base.

## TalkTalk broadband customers have a lower than average Net Promoter Score™

### Net Promoter score™, total market and by provider



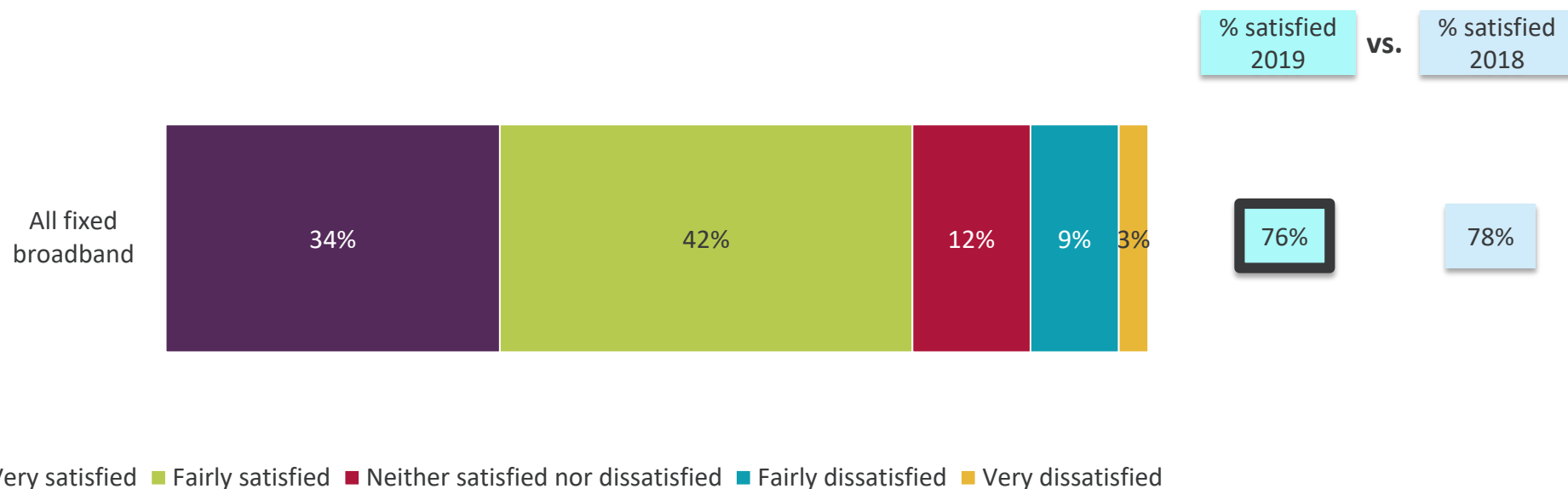
Source: Ofcom Customer Satisfaction Tracker survey 2019

QN3: Based on your overall experience of (FIXED BROADBAND PROVIDER) as your fixed broadband provider, how likely would you be to recommend them to a friend or family member as a fixed broadband provider? Please give a rating on a scale of 0 to 10, where 0 is 'Extremely Unlikely' and 10 is 'Extremely Likely'?

Base: All adults aged 16+ who are the decision maker and express an opinion on their fixed broadband internet service (2399), receiving their service from BT (507), EE (136), Plusnet (125), Sky (604), TalkTalk (416), Virgin Media (448). Providers used by fewer than 100 respondents are not shown individually but are included in the total.

As in 2018, over three quarters (76%) of standalone broadband customers say they are satisfied with the value for money of their service.

Satisfaction with value for money – standalone fixed broadband service\*



\*As value for money was asked of those with fixed broadband as a standalone service, it is not possible to show results for each broadband provider due to low base sizes

Source: Ofcom Customer Satisfaction Tracker survey 2019

IN3: And how satisfied are you with the overall value for money of your service from (FIXED BROADBAND PROVIDER)? Would you say you are...

Base: All adults aged 16+ who are the decision maker who express an opinion on their fixed broadband internet service where it is held as a standalone service/ not taken with another service from the same provider (213), 'Don't know' responses have been excluded from the base.



# Section 4

## Landline

## Summary - landline

When looking at overall satisfaction with landline services, close to nine in ten (86%) are satisfied

- In 2019, TalkTalk landline customers (81%) are less satisfied than average
- Satisfaction with landline services is unchanged compared to 2018 for the market as a whole and for each landline provider

As in 2018, nine in ten (90%) landline customers are satisfied with the reliability of their landline service

- In 2019, TalkTalk customers (85%) also are less satisfied than average with this aspect of their landline service

Close to nine in ten (89%) landline customers are satisfied with the clarity of the line when making or receiving calls, unchanged compared to 2018

- This measure does not vary by provider

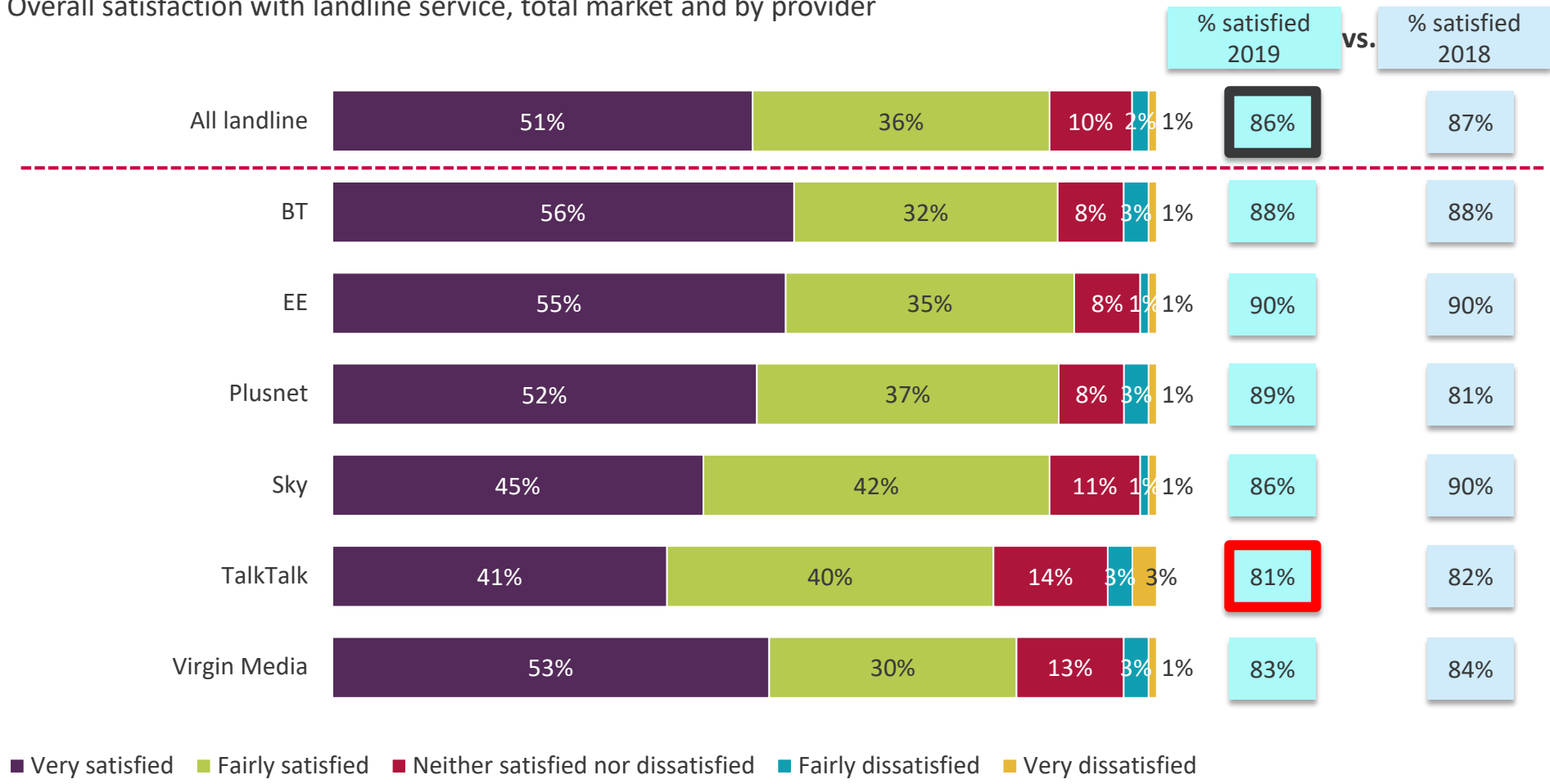
The Net Promoter Score™ is lower than average for TalkTalk landline customers

Nearly four in five (79%) standalone landline customers say they are satisfied with the value for money of their landline service



Over four in five customers (86%) are satisfied with their landline service, comparable to 2018. Satisfaction is lower among TalkTalk customers compared to this average.

Overall satisfaction with landline service, total market and by provider

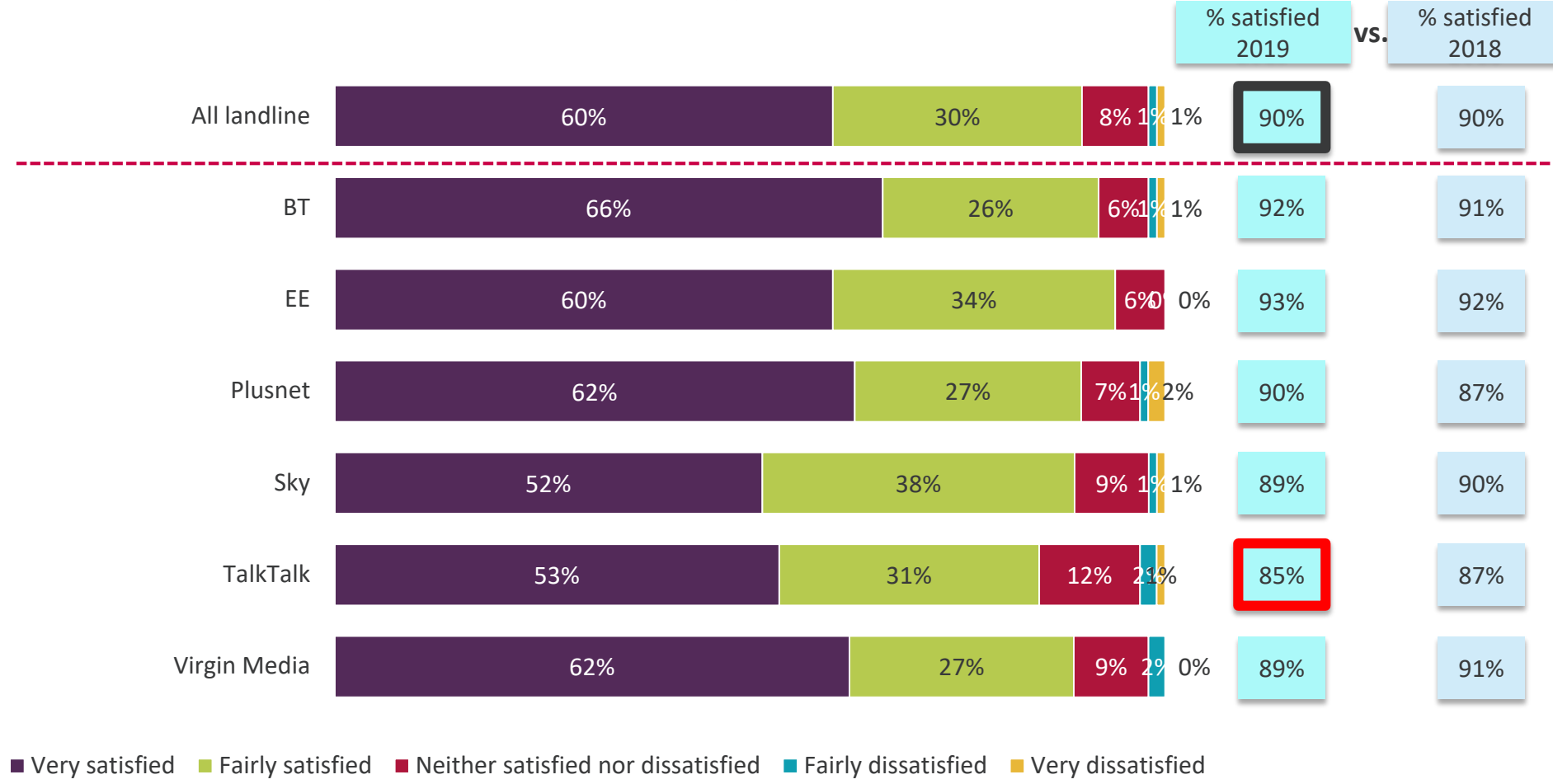


Source: Ofcom Customer Satisfaction Tracker survey 2019  
 L1: I'd like to ask you some questions about your home landline service from (LANDLINE PROVIDER). In terms of your landline service, how satisfied are you with the overall service provided by (LANDLINE PROVIDER)? Would you say you are...  
 Base: All adults aged 16+ who are the decision maker and express an opinion on their landline service (2404), receiving their service from BT (779), EE (108), Plusnet (112), Sky (512), TalkTalk (372), Virgin Media (372). Providers used by fewer than 100 respondents are not shown individually but are included in the total. 'Don't know' responses have been excluded from the base.



Nine in ten customers (90%) say they are satisfied with the reliability of their landline, as in 2018. Satisfaction amongst TalkTalk customers is lower than average.

Satisfaction with reliability of service, total market and by provider



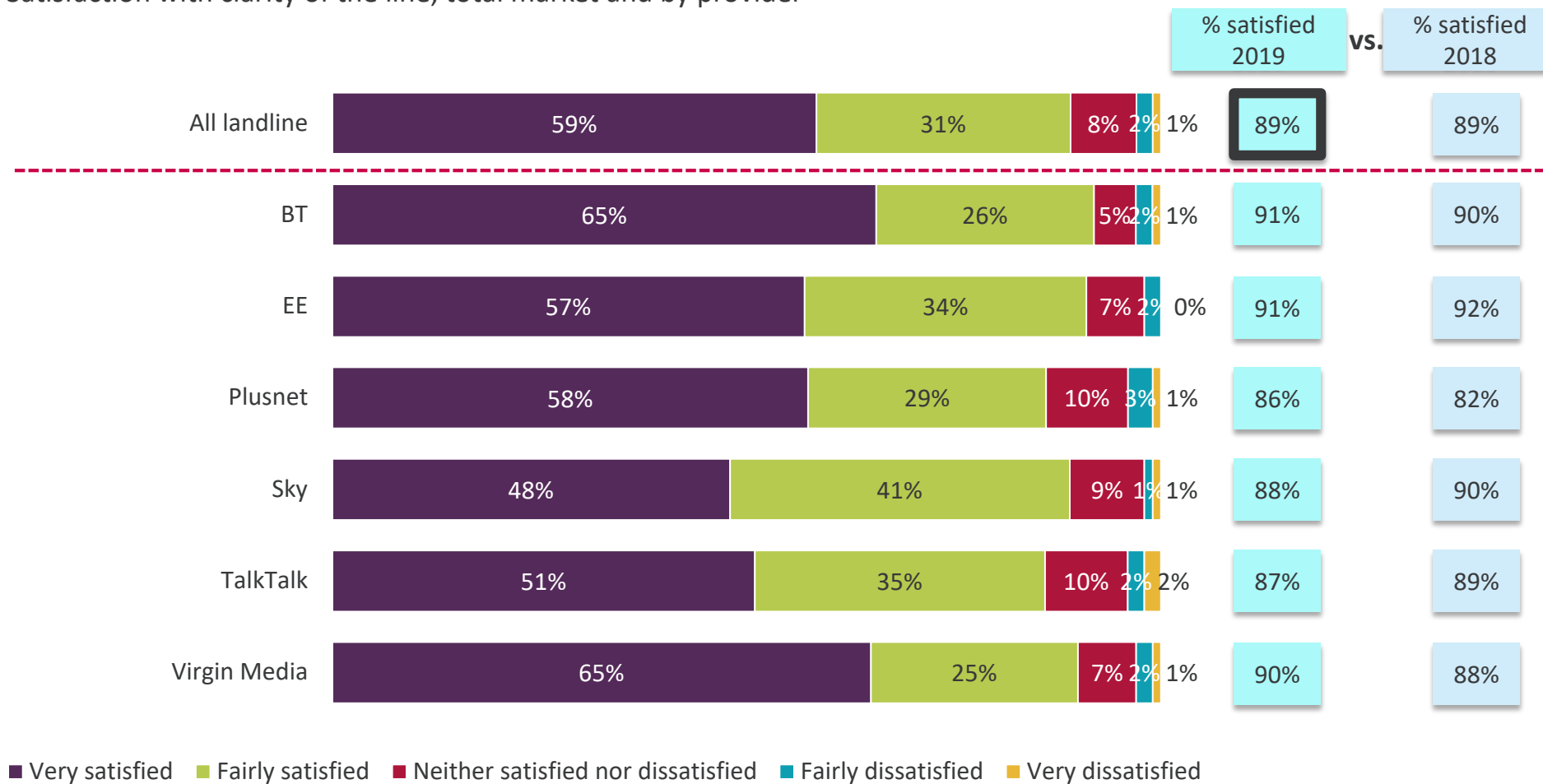
Source: Ofcom Customer Satisfaction Tracker survey 2019

L3: And how satisfied are you with the reliability of your landline service from (LANDLINE PROVIDER)? IF NECESSARY: By reliability, I mean being able to make a call when you need to, so getting a dialling tone? Would you say you are...

Base: All adults aged 16+ who are the decision maker and express an opinion on their landline service(2383), receiving their service from BT (777), EE (109), Plusnet (109), Sky (507), TalkTalk (365), Virgin Media (371). Providers used by fewer than 100 respondents are not shown individually but are included in the total. 'Don't know' responses have been excluded from the base..

Nine in ten customers (89%) are satisfied with the clarity of the line when making or receiving calls – comparable to 2018. Satisfaction does not vary by provider.

Satisfaction with clarity of the line, total market and by provider



Source: Ofcom Customer Satisfaction Tracker survey 2019

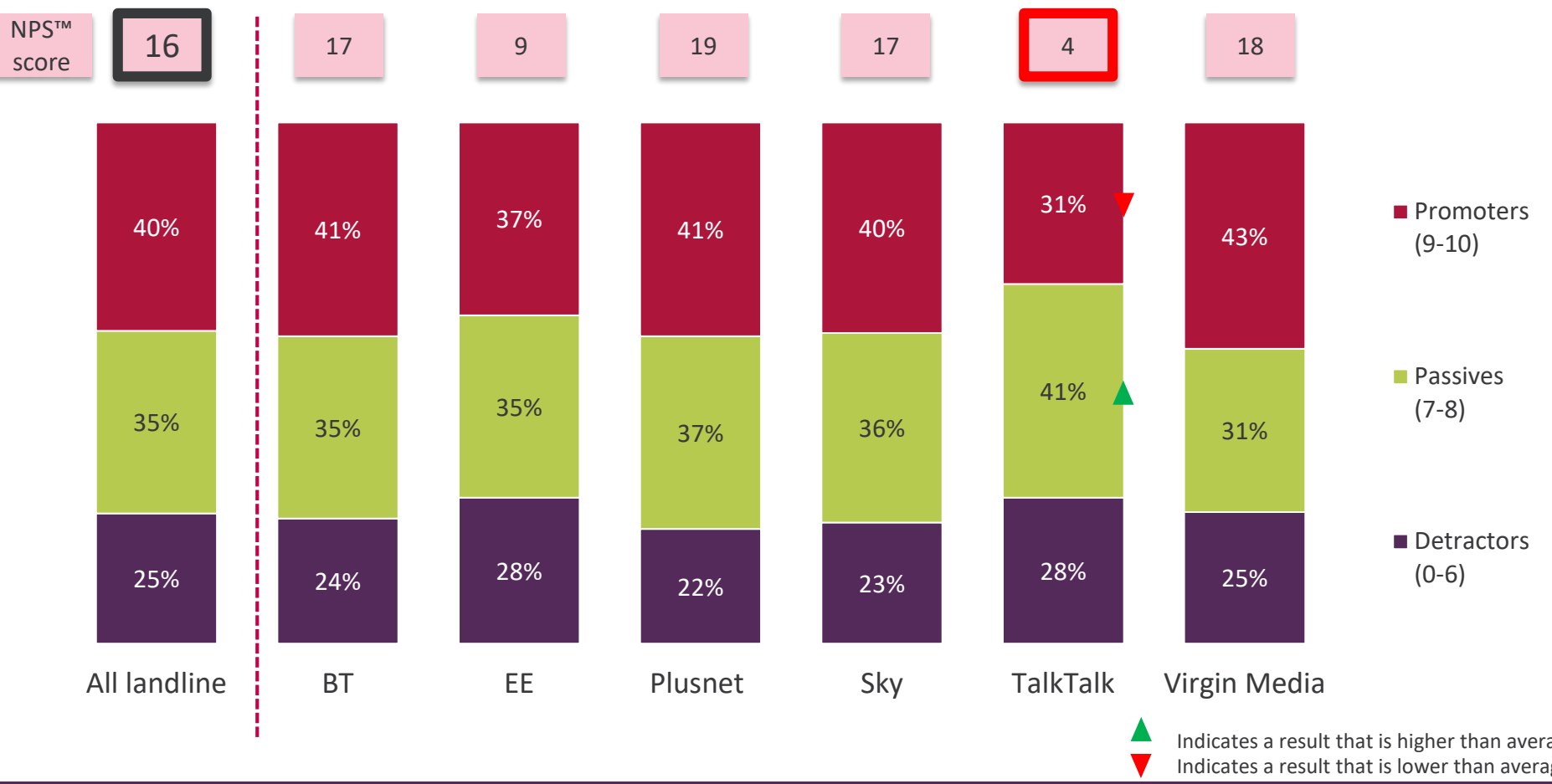
L4: And how satisfied are you with the clarity of the line when making or receiving calls on your landline from (LANDLINE PROVIDER)? IF NECESSARY: By this I mean being able to clearly hear the other person on the call. Would you say you are...

Base: All adults aged 16+ who are the decision maker and express an opinion on their landline service (2340), receiving their service from BT (769), EE (109), Plusnet (104), Sky (495), TalkTalk (360), Virgin Media (361). Other providers used by fewer than 100 respondents are not shown individually but are included in the total. 'Don't know' responses have been excluded from the base.



# TalkTalk landline customers have a lower than average Net Promoter Score™.

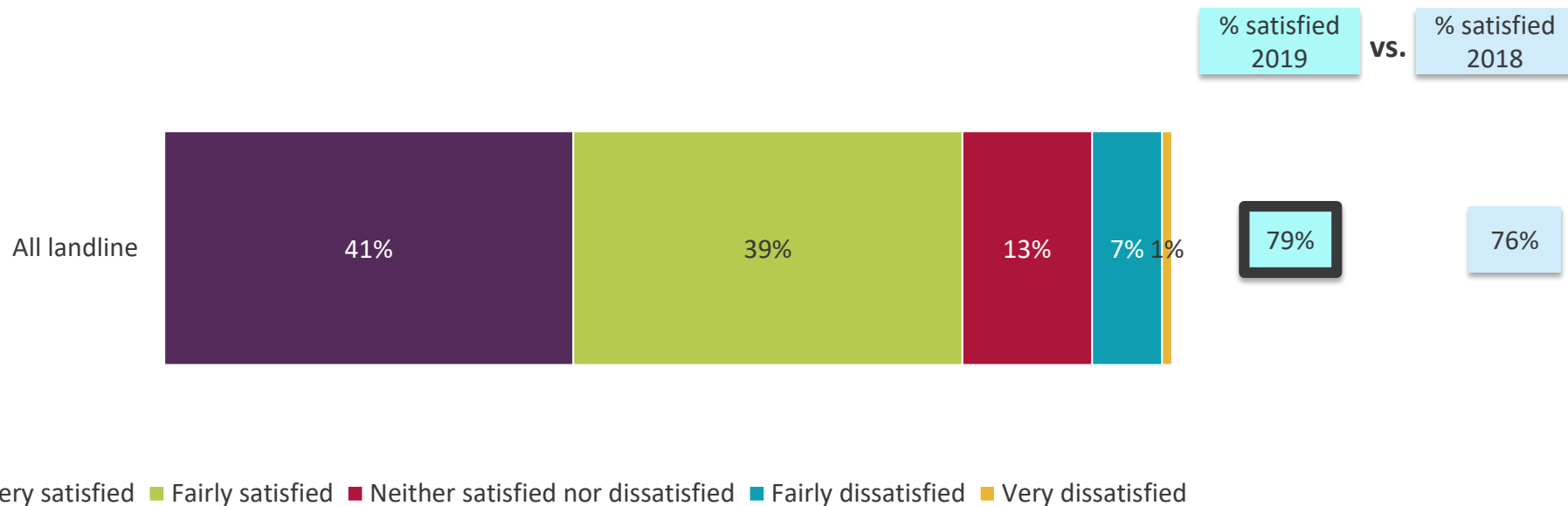
Net Promoter score (NPS™), total market and by landline provider



Source: Ofcom Customer Satisfaction Tracker survey 2019  
 QN1 Based on your overall experience of using (LANDLINE PROVIDER) for your landline service, how likely would you be to recommend them to a friend or family member as a landline provider? Please give a rating on a scale of 0 to 10, where 0 is 'Extremely Unlikely' and 10 is 'Extremely Likely'  
 Base: All adults aged 16+ who are the decision maker and express an opinion on their landline service (2466), receiving their service from BT (790), EE (117), Plusnet (114), Sky (533), TalkTalk (377), Virgin Media (382). Providers used by fewer than 100 respondents are not shown individually but are included in the total.

Close to four in five standalone landline customers are satisfied with the value for money of their service, unchanged compared to 2018.

Satisfaction with value for money – standalone landline service\*



\*As value for money was asked of those with a landline as a standalone service, it is not possible to show results for each landline provider due to low base sizes

Source: Ofcom Customer Satisfaction Tracker survey 2019

L2: And how satisfied are you with the overall value for money of your service from (LANDLINE PROVIDER)? Would you say you are...

Base: All adults aged 16+ who are the decision maker who express an opinion on their landline service where it is held as a standalone service/ not taken with another service from the same provider (349)

'Don't know' responses have been excluded from the base.

# Section 5

## Mobile



## Summary – mobile phone

More than nine in ten (93%) mobile phone customers say they are satisfied overall with their mobile phone service provider – this is unchanged from 2018

- Satisfaction does not vary by provider in 2019, there are also no differences in satisfaction between monthly contract and prepay customers
- Tesco Mobile customers are less satisfied compared to 2018 (90% vs. 97%)

87% of mobile customers are satisfied with the reception/ signal strength of their service, higher than in 2018 (84%)

- In 2019, compared to this average (87%) Virgin Mobile customers (96%) are more satisfied and Three customers are less satisfied (82%)
- Satisfaction with reception/ signal strength is higher than in 2018 among Virgin Mobile customers (96% vs 86%)
- Monthly contract customers are also more satisfied compared to 2018 (87% vs. 83%)

Giffgaff and Tesco Mobile customers have a higher than average NPS™

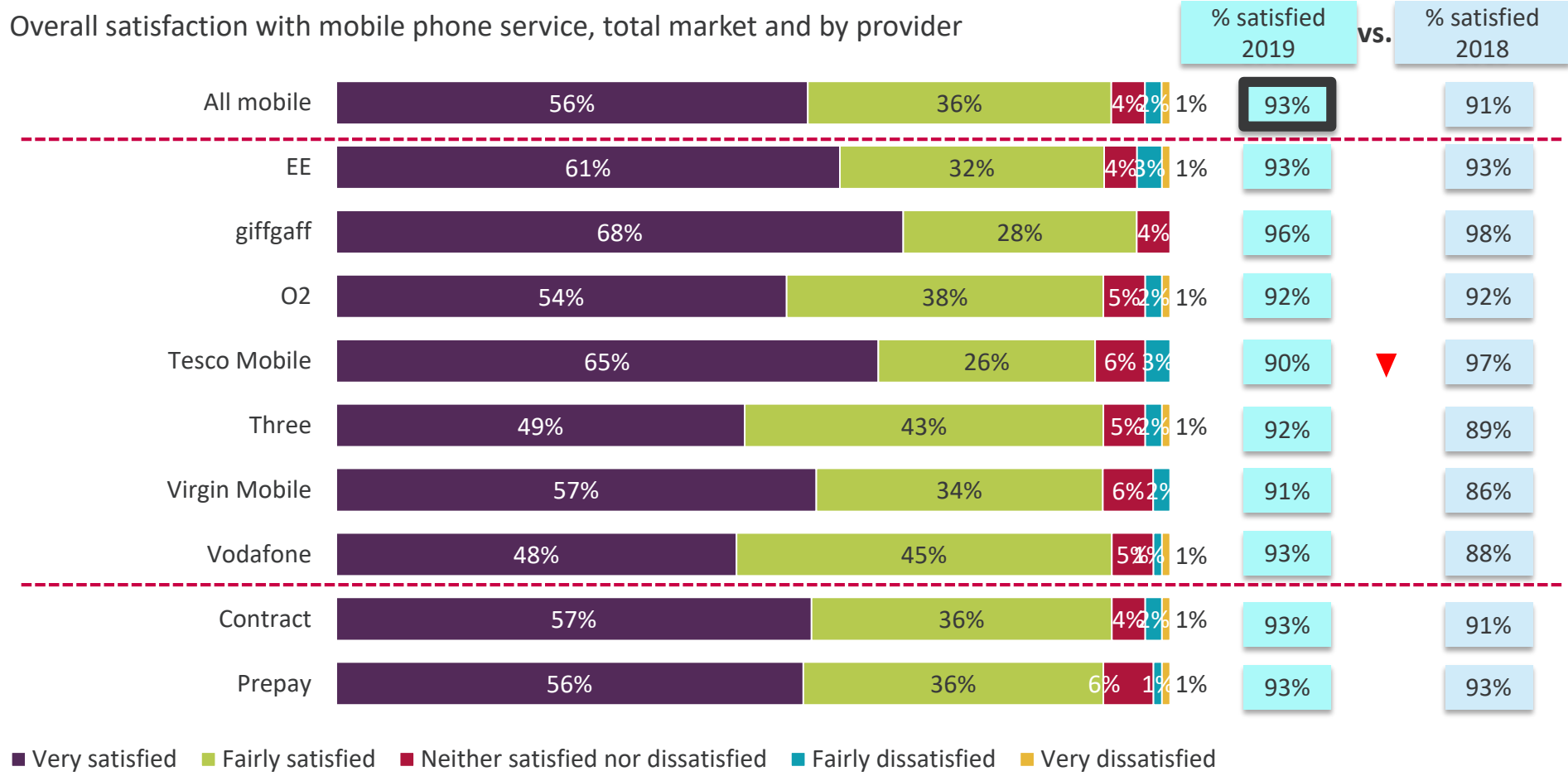
Nearly nine in ten (87%) standalone mobile phone customers say they are satisfied with the overall value for money of their mobile phone service

- This is an increase compared to 2018, however, as discussed previously this follows a similar decrease between 2016 (88%) and 2018 (84%)
- Satisfaction for this measure does not vary between monthly contract and prepay customers



More than nine in ten (93%) mobile customers are satisfied with the overall service provided, an increase compared to 2018 (91%). In spite of this increase in satisfaction for the market as a whole, Tesco Mobile customers (90%) are less satisfied than in 2018 (97%).

Overall satisfaction with mobile phone service, total market and by provider



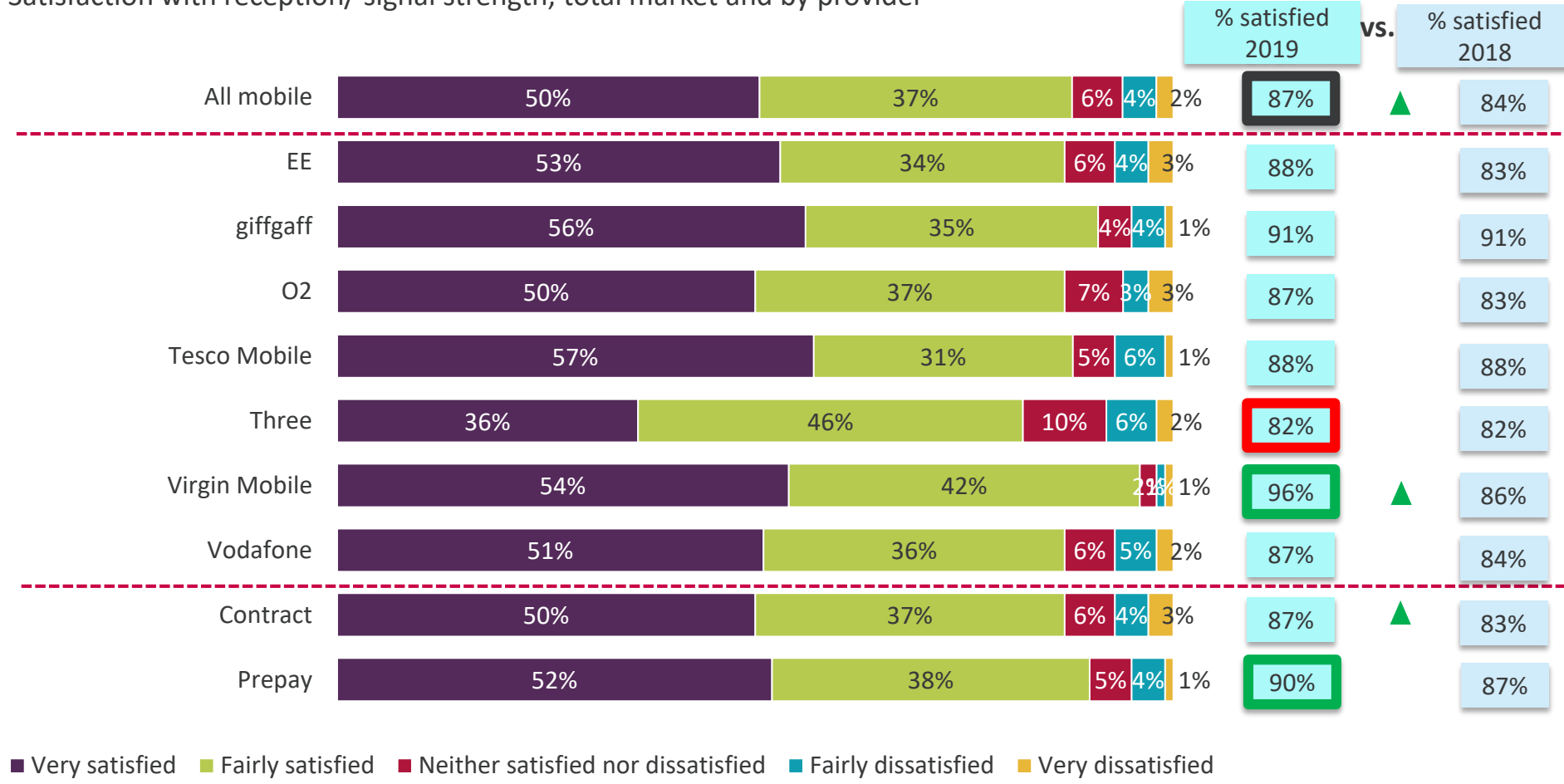
Source: Ofcom Customer Satisfaction Tracker survey 2019

M2: In terms of your mobile phone service, how satisfied are you with the overall service provided by (MOBILE PHONE SERVICE PROVIDER)? Would you say you are...  
 Base: All adults aged 16+ who are the decision maker and express an opinion on their mobile phone service (3078), receiving their service from EE (743), giffgaff (133), O<sub>2</sub> (694), Tesco Mobile (242), 3 (329), Virgin Mobile (170), Vodafone (428), on a contract (2306), on prepay (764). Providers used by fewer than 100 respondents are not shown individually but are included in the total. 'Don't know' responses have been excluded from the base.



Since 2018, satisfaction with mobile reception or signal strength has increased (87% vs. 84%) for the market as a whole and for Virgin Mobile customers in particular (96% vs. 86%). In 2019, customers of Three are less satisfied than average.

Satisfaction with reception/ signal strength, total market and by provider

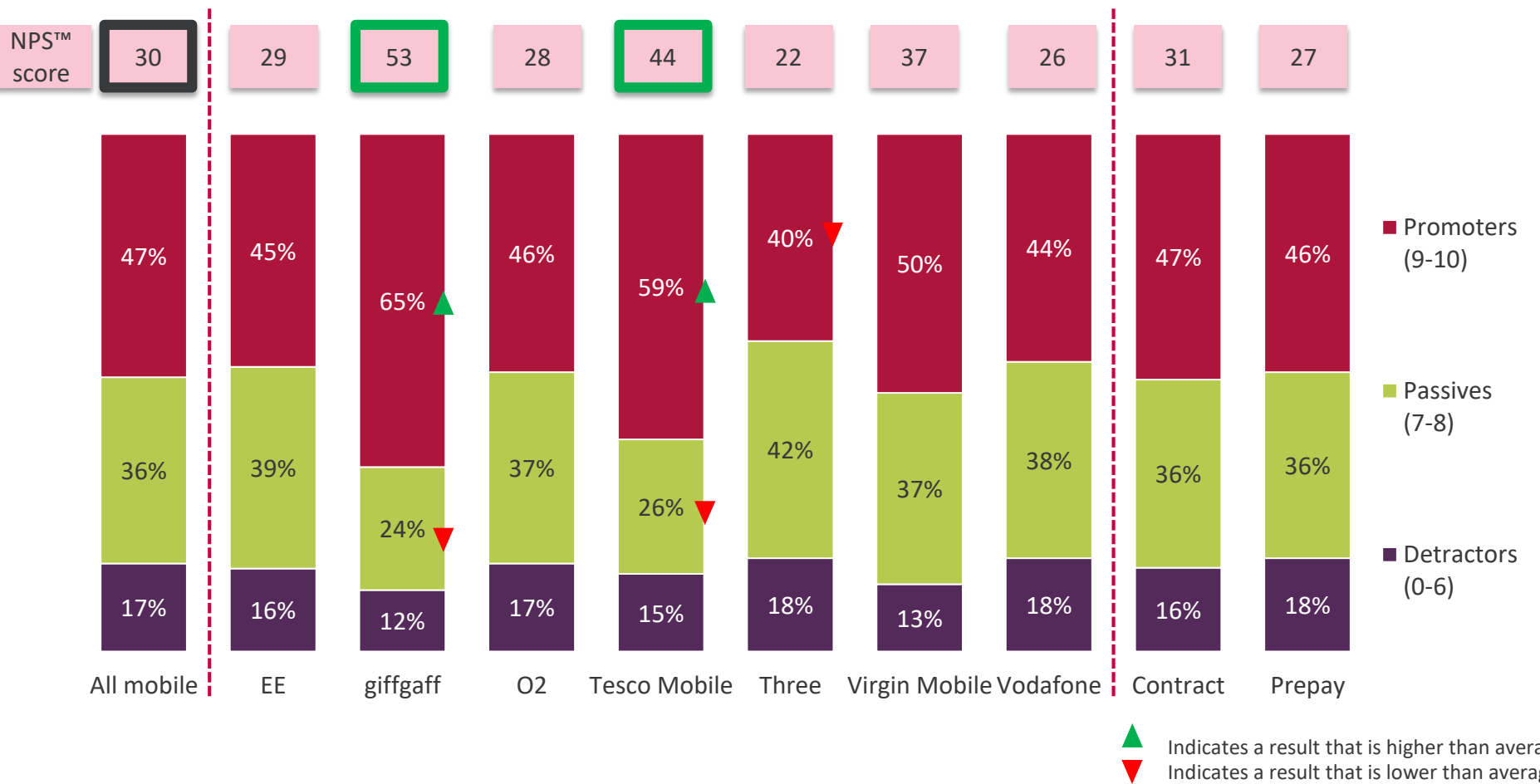


Source: Ofcom Customer Satisfaction Tracker survey 2019  
 M4: And how satisfied are you overall with the reception or signal strength that you get on your mobile phone service from (MOBILE PHONE SERVICE PROVIDER)? Would you say you are...  
 Base: All adults aged 16+ who are the decision maker and express an opinion on their mobile phone service (3079), receiving their service from EE (743), giffgaff (134), O<sub>2</sub> (693), Tesco Mobile (242), 3 (329), Virgin Mobile (170), Vodafone (428), on a contract (2308), on prepay (763). Providers used by fewer than 100 respondents are not shown individually but are included in the total. 'Don't know' responses have been excluded from the base.

# Giffgaff and Tesco Mobile customers have a higher than average Net Promoter Score™.



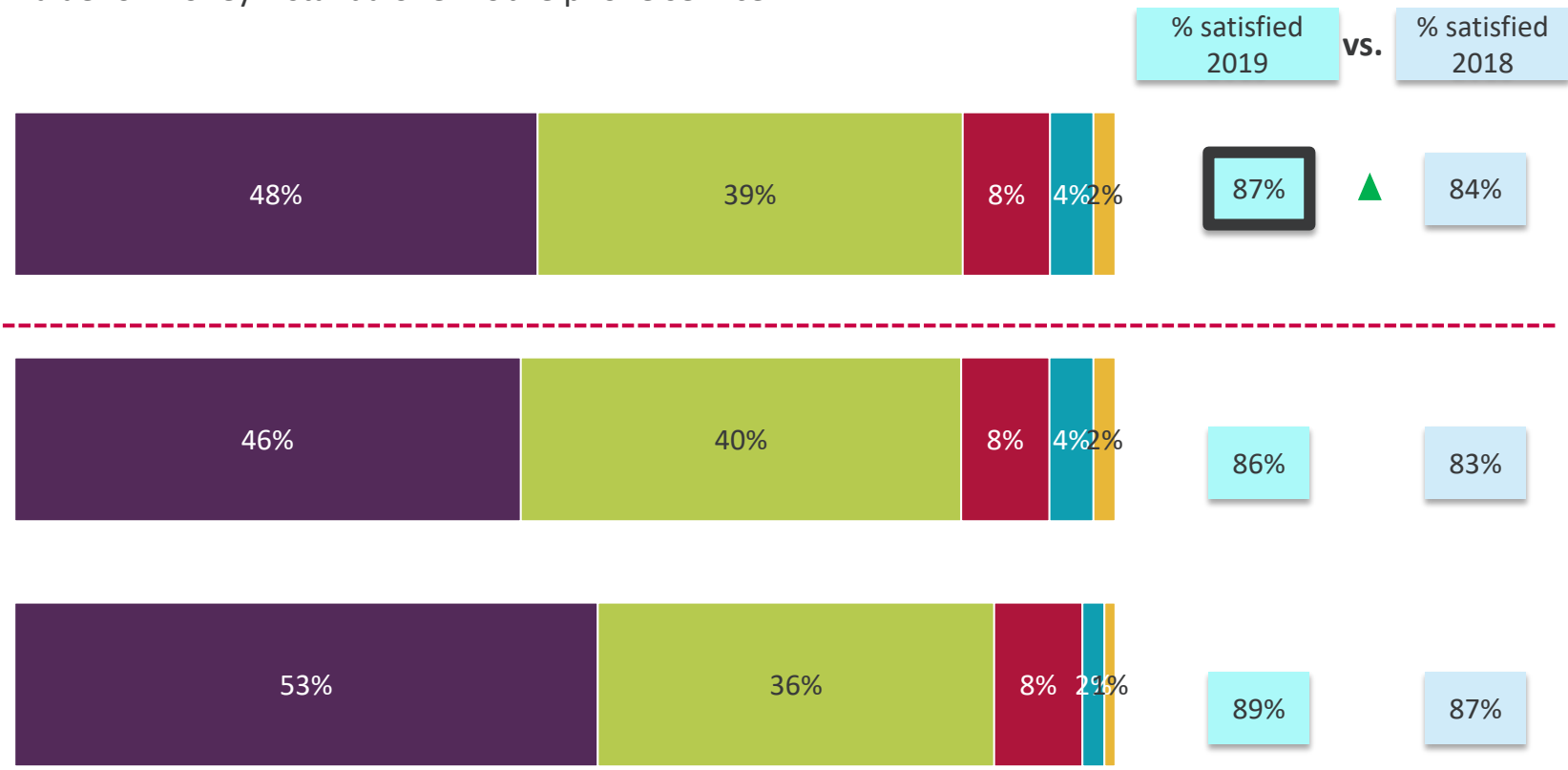
### Net Promoter score™, total market and by mobile phone service provider



Source: Ofcom Customer Satisfaction Tracker survey 2019  
 QN2: Based on your overall experience of (MOBILE PHONE SERVICE PROVIDER) as your mobile phone service provider, how likely would you be to recommend them to a friend or family member as a mobile phone service provider? Please give a rating on a scale of 0 to 10, where 0 is 'Extremely Unlikely' and 10 is 'Extremely Likely'?  
 Base: All adults aged 16+ who are the decision maker and express an opinion on their mobile phone service (3082), receiving their service from EE (744), giffgaff (134), O<sub>2</sub> (694), Tesco Mobile (242), 3 (329), Virgin Mobile (170), Vodafone (429), on a contract (2308), on prepay (766). Providers used by fewer than 100 respondents are not shown individually but are included in the total.

# Standalone mobile phone customers (87%) are more satisfied with the value for money of their mobile phone service, compared to 2018 (84%).

Satisfaction with value for money – standalone mobile phone service\*



■ Very satisfied ■ Fairly satisfied ■ Neither satisfied nor dissatisfied ■ Fairly dissatisfied ■ Very dissatisfied

\*As value for money was asked of those with a mobile phone as a standalone service, it is not possible to show results for each mobile phone provider due to low base sizes for some providers

# Section 6

## Pay TV

## Summary – Pay TV

As in 2018, close to nine in ten pay TV customers (88%) say they are satisfied overall with their pay TV service

- In 2019, overall satisfaction with their pay TV service does not vary by provider
- There has been no change in provider satisfaction scores since 2018

Nine in ten (90%) pay TV customers are satisfied with the reliability of their pay TV service

- This average is also unchanged compared to 2018
- In 2019, satisfaction with service reliability is lower among BT TV customers (82%) compared to the average

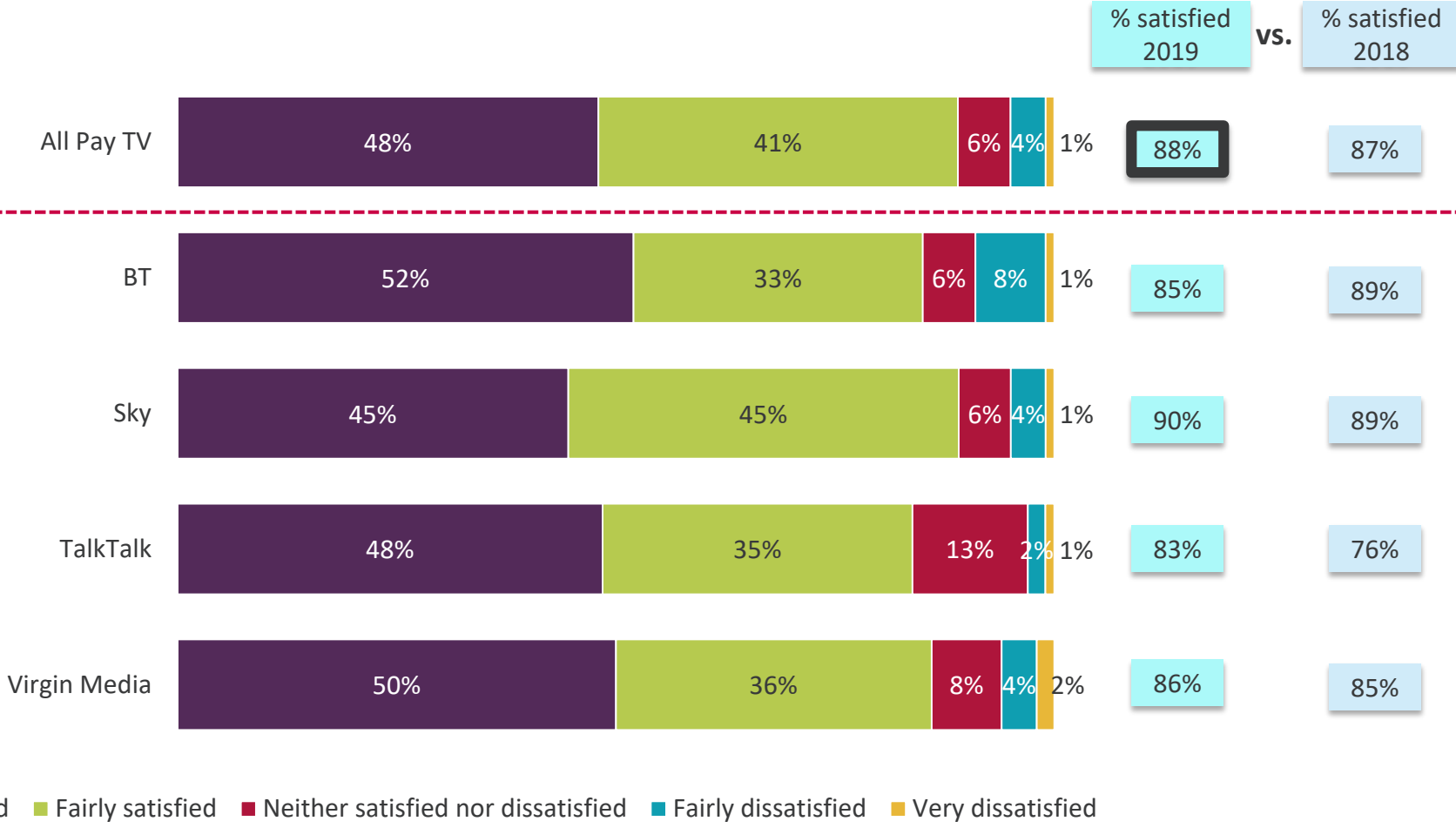
The NPS™ among pay TV providers does not vary compared to the average

Seven in ten (71%) standalone pay TV customers are satisfied with the value for money of their service

- This is an increase compared to 2018, however, as discussed previously this increase follows a similar decrease between 2016 (69%) and 2018 (58%)

Overall satisfaction among pay TV customers does not vary by provider. It is unchanged compared to 2018, for the market as a whole and by provider.

Overall satisfaction with pay TV service, total market and by provider



Source: Ofcom Customer Satisfaction Tracker survey 2019

PT1: I'd like to ask you some questions about your pay TV service provided by (PAY TV SERVICE PROVIDER). How satisfied are you with the overall service provided by your television service provider (PAY TV SERVICE PROVIDER) ? Would you say you are...

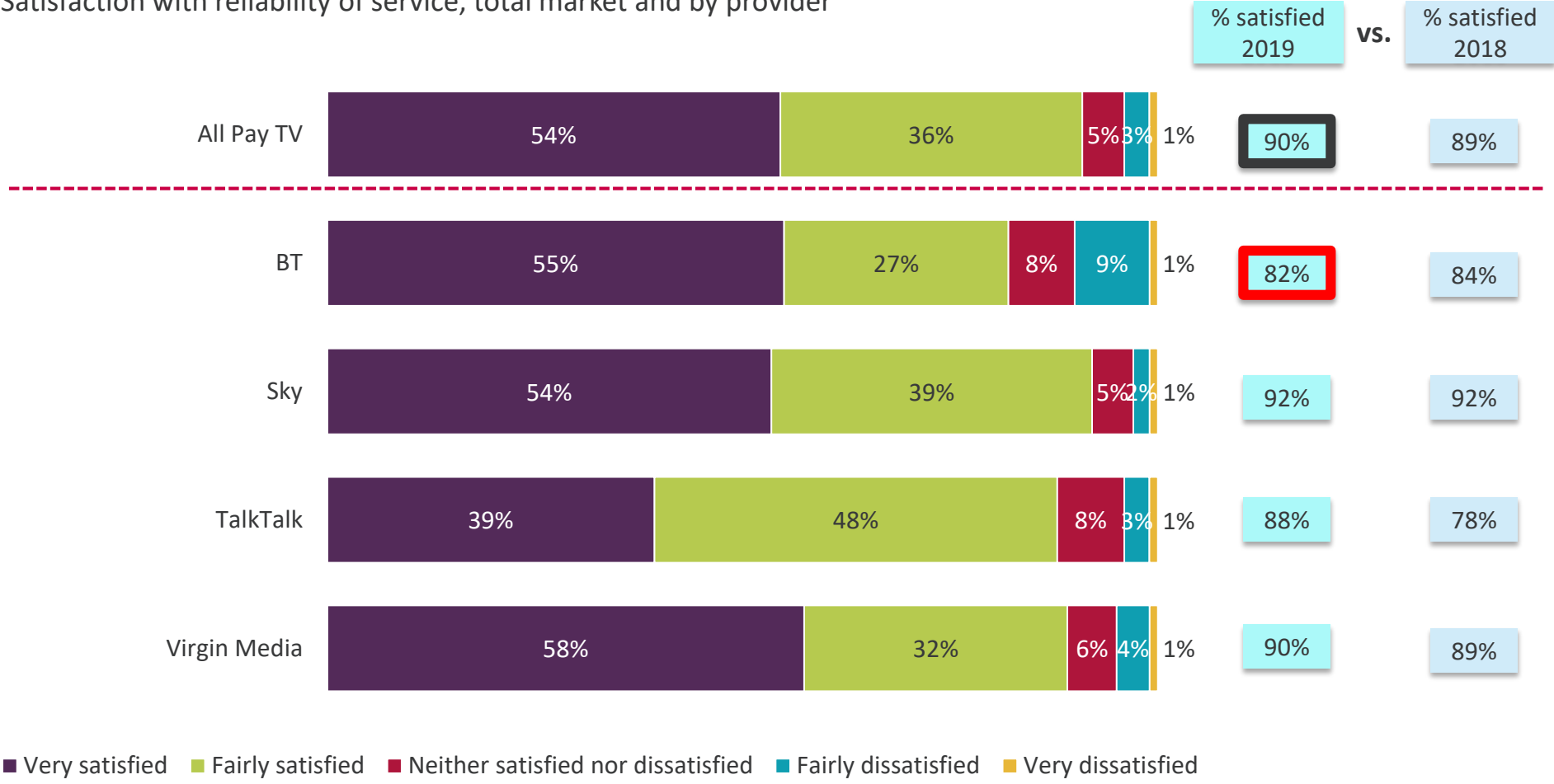
Base: All adults aged 16+ who are the decision maker and express an opinion on their pay TV service (1575), receiving their service from BT (151), Sky (870), TalkTalk (116), Virgin Media (356). Providers used by fewer than 100 respondents are not shown individually but are included in the total. 'Don't know' responses have been excluded from the base.





Nine in ten pay TV customers (90%) are satisfied overall with the reliability of their pay TV service, unchanged compared to 2018. Customers with BT TV (82%) have lower levels of satisfaction in 2019, compared to the market as a whole.

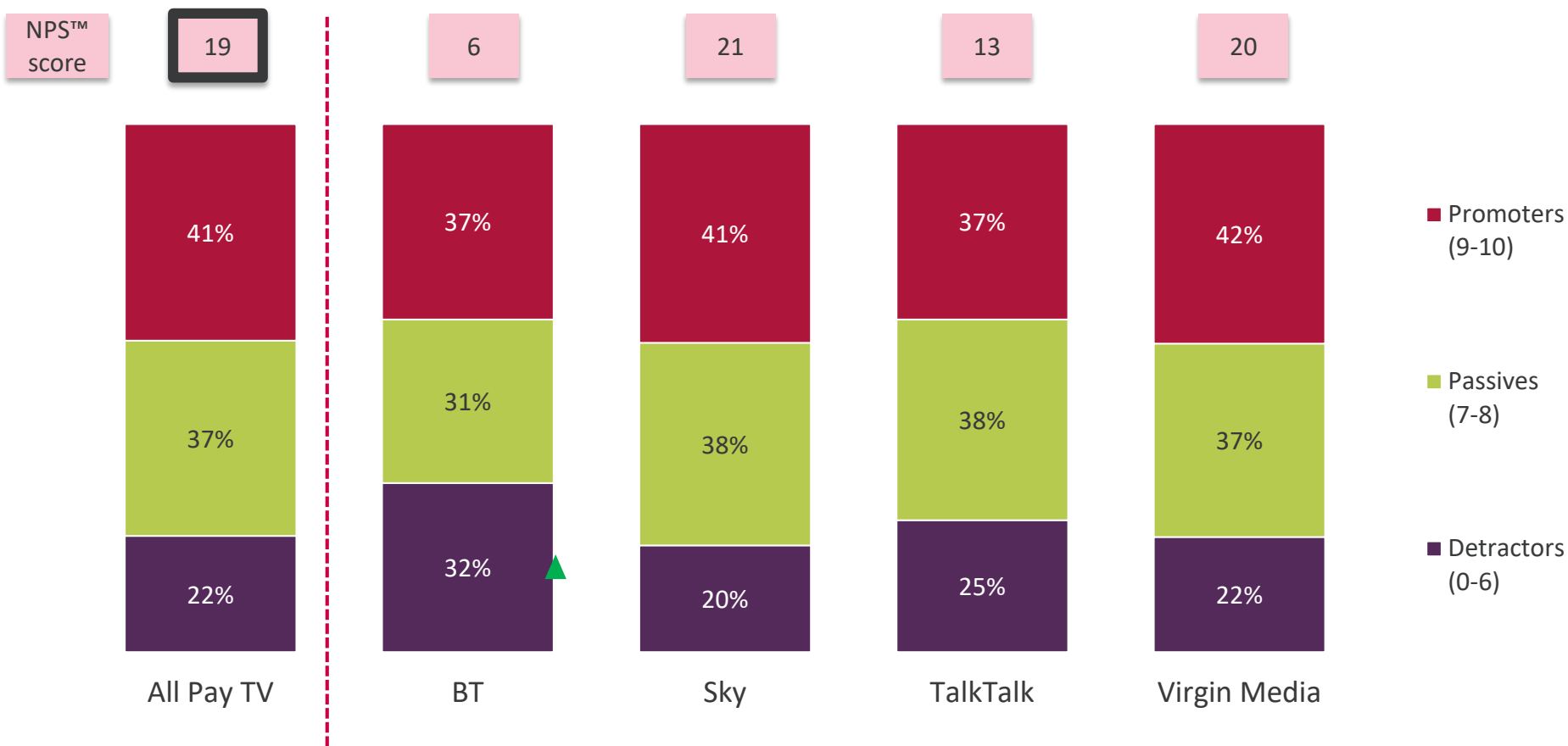
Satisfaction with reliability of service, total market and by provider



Source: Ofcom Customer Satisfaction Tracker survey 2019  
 PT3 And how satisfied are you with the reliability of your pay TV service from (PAY TV SERVICE PROVIDER)? Would you say you are...  
 Base: All adults aged 16+ who are the decision maker and express an opinion on their pay TV service (1573), receiving their service from BT (151), Sky (870), TalkTalk (116), Virgin Media (354).  
 Providers used by fewer than 100 respondents are not shown individually but are included in the total. 'Don't know' responses have been excluded from the base.

Pay TV customers as a whole are more likely to be 'Promoters' rather than 'Detractors', resulting in a positive Net Promoter Score™ for the pay TV market. Although this score does not vary by provider, BT customers are more likely than average to be 'Detractors'.

Net Promoter score (NPS™), total market and by pay TV provider



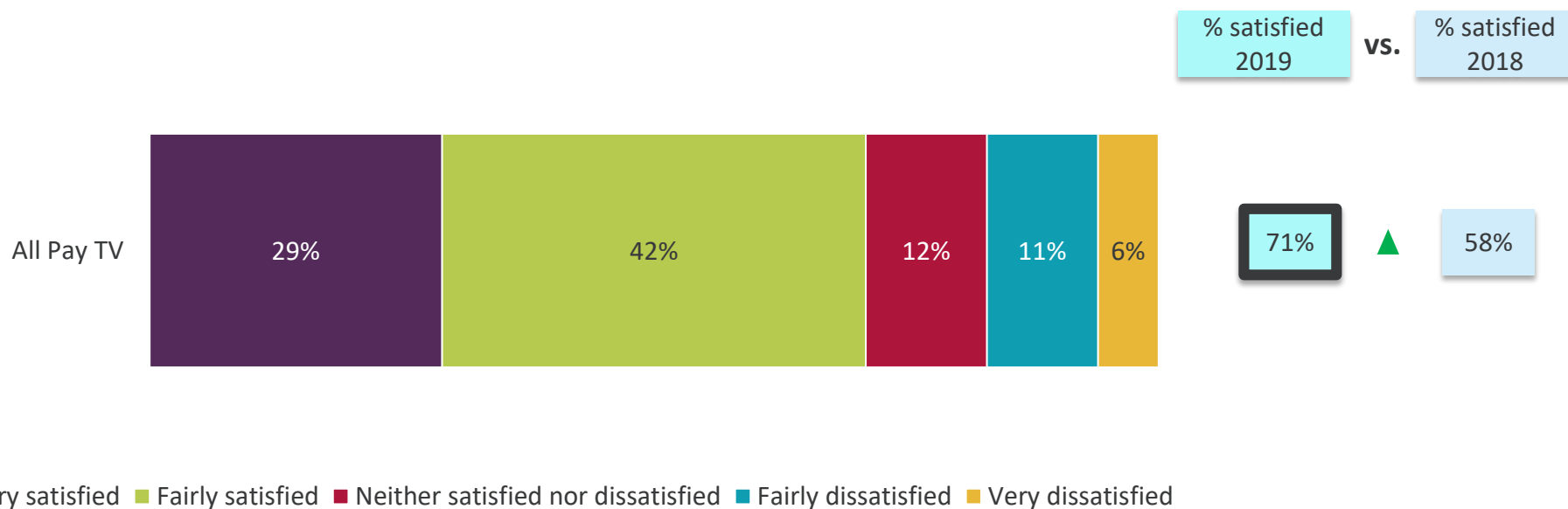
Source: Ofcom Customer Satisfaction Tracker survey 2019

QN4: Based on your overall experience of using (PAY TV PROVIDER) as your pay TV provider, how likely would you be to recommend them to a friend or family member as a landline provider? Please give a rating on a scale of 0 to 10, where 0 is 'Extremely Unlikely' and 10 is 'Extremely Likely'?

Base: All adults aged 16+ who are the decision maker and express an opinion on their pay TV service (1576), receiving their service from BT (151), Sky (870), TalkTalk (116), Virgin Media (356). Providers used by fewer than 100 respondents are not shown individually but are included in the total.

Seven in ten standalone pay TV customers (71%) are satisfied with the value for money of their pay TV service, which is higher compared to 2018 (58%).

Satisfaction with value for money – standalone pay TV service\*



\*As value for money was asked of those with pay TV as a standalone service, it is not possible to show results for each pay TV provider due to low base sizes

Source: Ofcom Customer Satisfaction Tracker survey 2019

PT2: And how satisfied are you with the overall value for money of your service from ( PAY TV SERVICE PROVIDER)? Would you say you are...

Base: All adults aged 16+ who are the decision maker who express an opinion on their pay TV service service where it is held as a standalone service/ not taken with another service from the same provider (393), 'Don't know ' responses have been excluded from the base.

# Section 7

## Services taken from the same provider/ Bundle

## Summary – services taken with the same provider

Eighty six percent of bundle customers are satisfied overall with the service they receive – unchanged compared to 2018

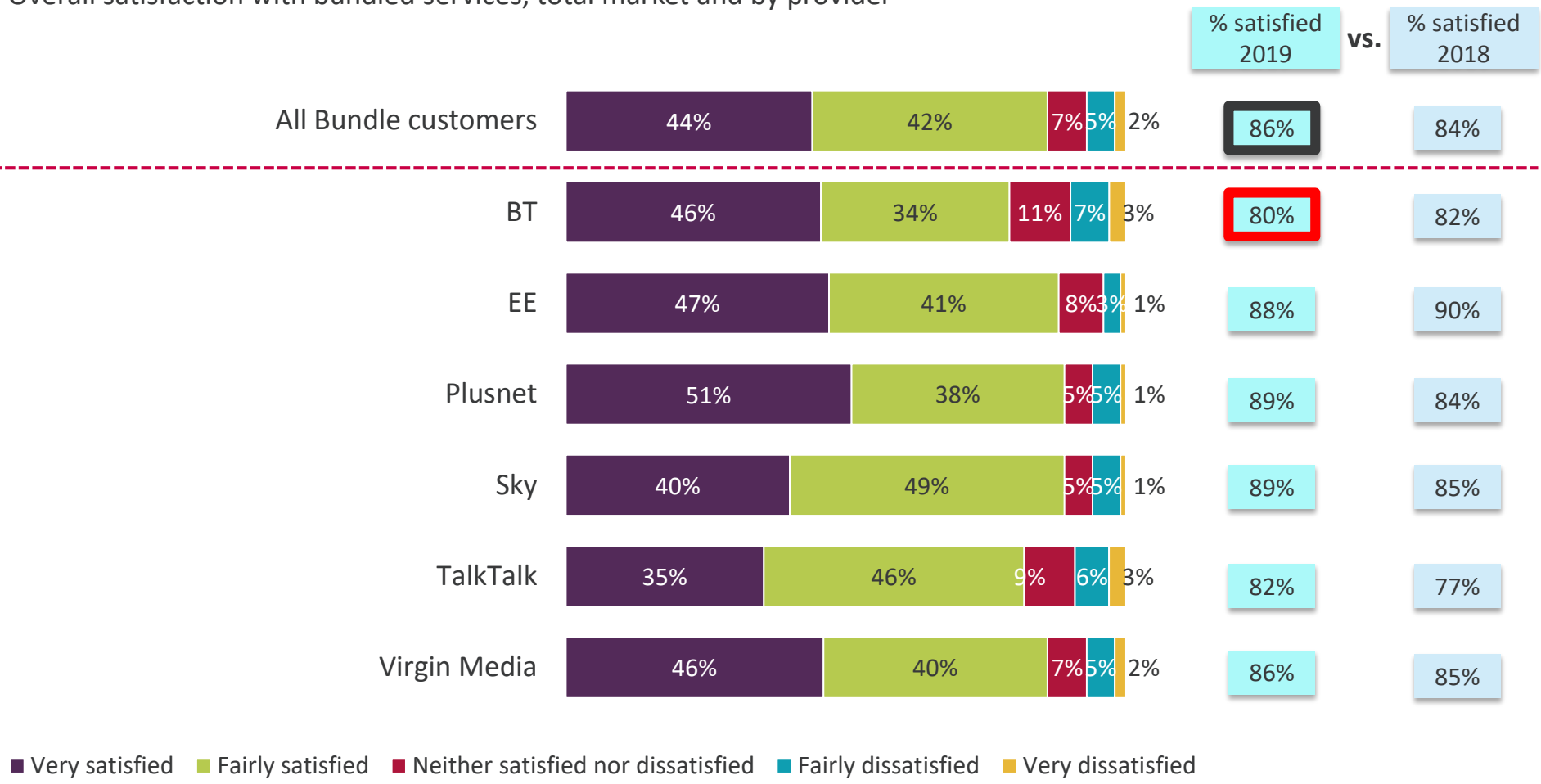
- BT bundle customers (80%) are less likely than average (86%) to be satisfied

More than seven in ten (73%) bundle customers are satisfied with the overall value for money of these services, also unchanged compared to 2018

- Satisfaction with value for money is higher than average among those who have more than one service with Plusnet (84%) or with TalkTalk (80%)

Nearly nine in ten (86%) bundle customers say they are satisfied overall with the service provided – unchanged compared to 2018. In 2019, BT bundle customers (80%) are less likely than average to be satisfied.

Overall satisfaction with bundled services, total market and by provider

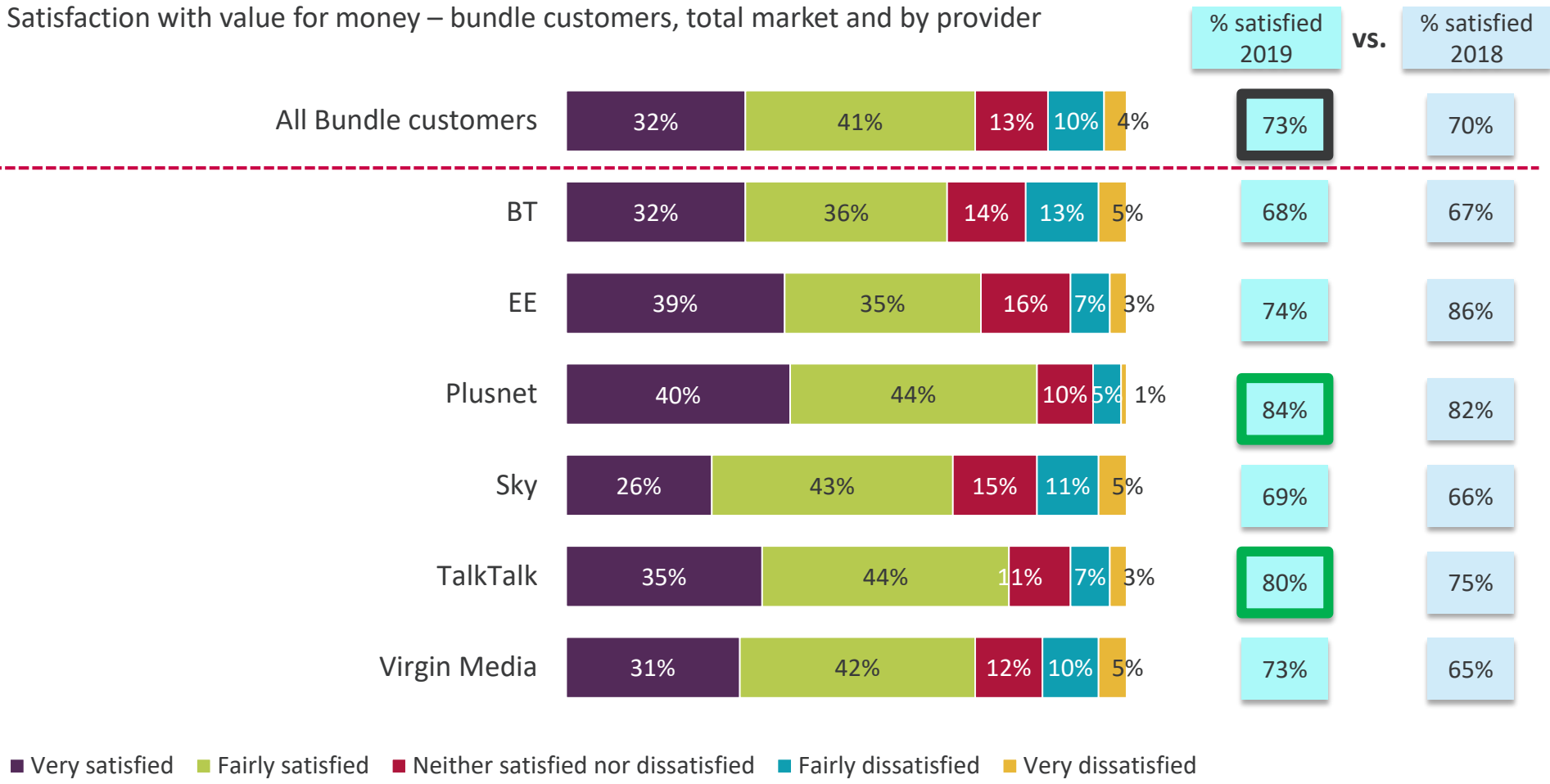


Source: Ofcom Customer Satisfaction Tracker survey 2019  
 B1: I'd like to talk to you about the services you have from the same supplier - so using (PROVIDER) for your (SERVICES TAKEN). In terms of you overall package of services, how satisfied are you with the overall service provided by (PROVIDER)? Would you say you are...  
 Base: All adults aged 16+ who are the decision maker and express an opinion on those services they take from the same provider (2271), receiving their service from BT (491), EE (126), Plusnet (112), Sky (588), TalkTalk (378), Virgin Media (418). Providers used by fewer than 100 respondents are not shown individually but are included in the total. 'Don't know' responses have been excluded from the base.



More than seven in ten bundle customers (73%) say they satisfied with the value for money of these services, unchanged compared to 2018. In 2019, Plusnet (84%) and TalkTalk bundle (80%) customers have higher levels of satisfaction compared to this average.

Satisfaction with value for money – bundle customers, total market and by provider



Source: Ofcom Customer Satisfaction Tracker survey 2019

B2: And how satisfied are you with the overall value for money of your service from (PROVIDER)? Would you say you are...

Base: All adults aged 16+ who are the decision maker and express an opinion on those services they take from the same provider (2261), receiving their service from BT (488), EE (125), Plusnet (112), Sky (587), TalkTalk (374), Virgin Media (417). Providers used by fewer than 100 respondents are not shown individually but are included in the total. 'Don't know' responses have been excluded from the base.