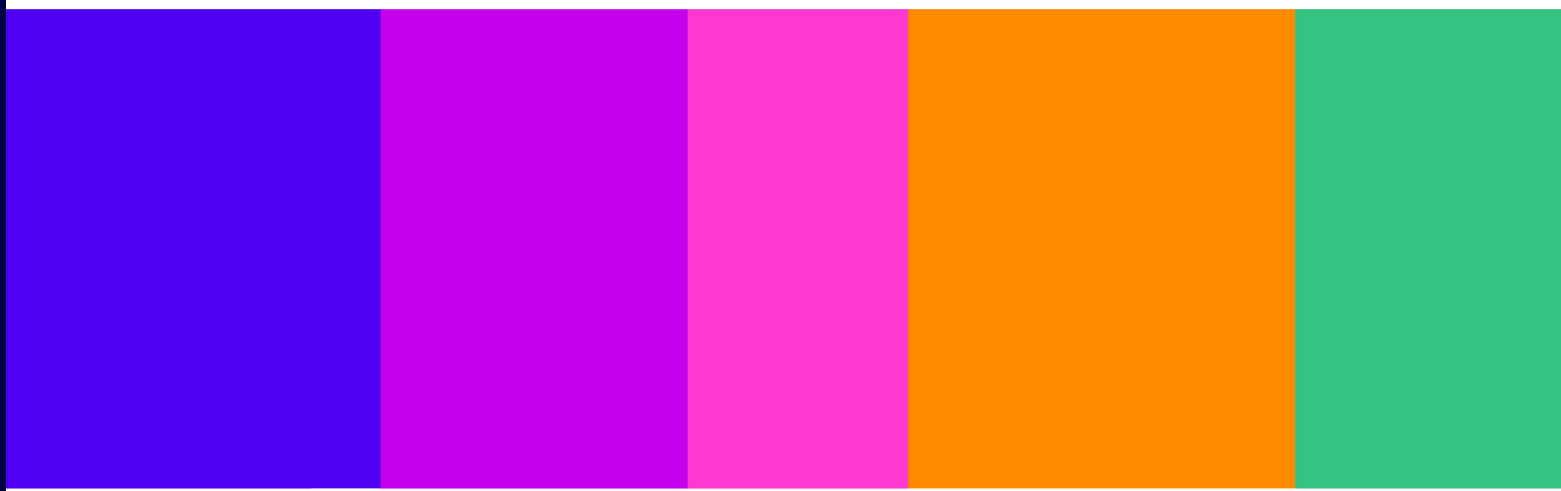


# Comparing customer service: mobile, landline and home broadband

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Published 18 May 2023



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# 1. Overview

This is Ofcom's seventh annual report on how customer service levels for residential customers compare across the telecoms industry. We publish it to help people make informed decisions about which provider is best for them, as part of our work to ensure fairness for customers, and to incentivise the UK's main mobile, home broadband and landline providers to improve their level of customer service.

This report covers customers' experiences in 2022. Overall customer satisfaction levels were high, particularly for mobile services, although this has decreased since 2021. Some aspects of quality of service have improved; for example, complaints made to Ofcom have reduced when compared with the previous year. However, the percentage of customers who had a reason to complain increased for both landline and mobile services. Satisfaction with complaints handling remained the same as in 2021 and there is still room for further improvement. In addition, average call waiting times and call abandonment rates have increased since 2021. At a time when many customers have experienced significant price rises, it is vital that providers do more to improve customer service and put treating customers fairly at the heart of their business.

Although the focus of this report is on customer service, we acknowledge there are other factors which customers may consider when choosing a telecoms service; for example, availability and price. Regarding the latter, we recently published our [Affordability report 2023](#) which sets out consumers' attitudes and behaviours regarding the affordability of communications services and the progress made on the awareness, availability and take-up of social tariffs.

The information in this report has been collected through our own research, directly from the larger telecoms providers and from third parties. The high-level findings in this report are supported by an [interactive data tool](#), which provides detailed information on how providers compare across all the datasets we have collected.

## What we have found

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**Mobile customers were the most likely to be satisfied with the service from their provider, with 87% saying they were satisfied with their service overall and only 4% saying they were dissatisfied.** This compared to 82% of broadband customers and 77% of landline customers who were satisfied with their service, with dissatisfaction at 7% and 4% respectively.

**For mobile, giffgaff and Tesco Mobile customers had higher than average satisfaction (both 95%),** while Virgin Mobile's customers had lower than average satisfaction (81%). **For broadband, Plusnet customers had higher than average satisfaction (89%). For landline, EE customers showed higher than average satisfaction (90%).** As in 2021, Virgin Media customers had lower than average satisfaction (70%) with their landline service.

**Across mobile, broadband and landline, the average number of complaints made to Ofcom per 100,000 customers either fell or stayed the same for most providers when compared with 2021.** However, there were increases for some providers: BT Mobile, O2, EE and Tesco Mobile in the mobile sector (up by five, two, one and one complaints per 100,000 customers respectively), EE in broadband (up by two) and Vodafone in landline (up by five). Sky had the lowest average number of complaints made to Ofcom for mobile, broadband and landline.

**As in 2021, only around half of mobile, broadband and landline customers who made a complaint to their provider in 2022 were satisfied with the way their complaint was handled.** This was an industry-wide issue, with no individual provider receiving more than 56% satisfaction with its complaint handling. Thirty-four per cent of customers in each sector provided a neutral response. For mobile, 13% of complainants were dissatisfied, while for landline and broadband 15% of complainants were dissatisfied. Our research to understand the factors which drive satisfaction with complaints handling suggests that there are steps providers can take, including reviewing their procedures for ensuring customers are treated fairly throughout the complaints handling process.

**Average call waiting times were just under two and half minutes in 2022.** Mobile customers calling their provider spent an average of 2min 23s in a queue, while broadband and landline customers waited 2min 37s on average. For mobile, O2, Tesco Mobile, Virgin Mobile and Vodafone managed to reduce their average call waiting times in 2022. For broadband and landline, only KCOM, Sky and Virgin Media reduced their average call waiting times compared with 2021.

**In 2022, broadband and landline providers took two days on average to fix faults where there was a total loss of service.** KCOM was often quickest to resolve, while Virgin Media was able to resolve 98% of faults within a week. As in 2021, BT resolved the lowest proportion of faults within a week and had the highest proportion of re-contacts. **Overall, the proportion of re-contacts in a year fell from 15% to 4% of customers having to re-contact about their fault.**

**Three per cent of repair and provision appointments were missed in 2022, consistent with 2021.** Plusnet was the only provider that missed a higher proportion of appointments in 2022 than in 2021.

**In 2022, signatories to the automatic compensation scheme paid £60m to consumers when things went wrong with their broadband and/or landline, £1.5m more than in 2021.** It is encouraging to see a decrease in the volume of payments for delayed repairs and missed appointments, despite an increase in the number of signatories, indicating fewer instances when things went wrong. However,

the volume of payments for the delayed provision of a new service increased by 17%, so there is still room for improvement.

## Changes to our customer research trackers

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This year we can compare data from the two most recent waves (2021 and 2022) of all three Ofcom trackers looking at customers' experiences in the telecoms sector: the Reasons to Complain Tracker (RtC), the Customer Satisfaction Tracker (CST) and the Complaints Handling Tracker (CHT).

For more information about the methodologies used for each of these trackers, and the changes we have made to them in recent years, please see [Annex 2 Customer research sources](#).

In 2022, we added Vodafone for landline and Sky for mobile across all three trackers, as these providers had sufficient customers to achieve a robust sample size for the relevant services.

For 2022, we conducted some additional qualitative research to explore what drives [satisfaction and dissatisfaction with complaints handling](#). This research was designed to provide further insights into the experiences of people who made complaints about their mobile, landline or broadband service and why they were satisfied or dissatisfied. Please refer to the [A Closer Look into Customer Satisfaction with Complaints Handling](#) section at the end of this report for further information.

## 2. Mobile customer service

	Average mobile <sup>1</sup>										
Satisfaction with service overall	87%↓	N/A	87%	95%	N/A	85%↓	88%	95%	83%	81%	86%
Satisfaction with reception or signal strength	81%	N/A	80%	83%	N/A	78%	79%	92%	75%	75%	84%
Satisfaction with value for money <sup>2</sup>	82%↓	N/A	74%	93%	N/A	79%	N/A	95%	84%	81%*	76%
Customers with a reason to complain	12%↑	18%	12%↑	11%	4%	9%	14%↑	7%	21%	12%	17%↑
Overall satisfaction with complaint handling	53%	N/A	55%	52%	N/A	53%	54%	50%	50%	54%	56%
Complaints to Ofcom per 100,000 subscribers	8↓	14↑	6↑	N/A	10↓	10↑	5	5↑	9↓	12↓	9↓
Average call waiting times (mm:ss)	2:23↑	1:45↑	3:41↑	N/A	1:52↑	2:33↓	1:51	1:05↓	0:47↑	1:39↓	2:03↓

**XX** Statistically significantly better than the sector average at the 95% confidence level for market research results.

**XX** Statistically significantly worse than the sector average at the 95% confidence level for market research results.

<sup>1</sup> Please note, some providers use the same network, for example, giffgaff, Sky, Tesco and Virgin use O2's network. BT uses EE's network and iD Mobile uses Three's network.

<sup>2</sup> Fieldwork was conducted in November-December 2022, before any 2023 inflation linked in-contract price rises came into effect.

↑ ↓ Significantly higher or lower than the previous year (2021) at the 99% confidence level for the Customer Satisfaction Tracker and the Reasons to Complain Tracker, and at the 95% confidence level for the Complaints Handling Tracker. Arrows also indicate the figure is higher or lower than the previous year (2021) for operator data.

\* Satisfaction with value for money: Virgin Mobile had a low base size for this measure (74) associated with a wide margin of error, so results should be treated as indicative only.

Note: Where a provider has a lower base size (noting that a provider's base size reflects its share of the relevant market), it is possible that despite a result the same as, or close to, that of the sector average and/or other providers, it is not statistically the same. This is due to a wider margin of error.

Results are marked 'N/A' where a provider was not included in the research trackers or where the sample size is too low for a finding to be included i.e. less than 50. See Annex 1 and 2 for further details on provider base sizes and significance testing. See Annex 3 for complaints to Ofcom and average call waiting times methodologies.

Sky Mobile was included as a mobile provider in our customer satisfaction and satisfaction with complaints handling research trackers for the first time in this wave, therefore year-on-year comparisons are not available for metrics from these trackers for this provider. The Reasons to Complain tracker had a sufficient base size for Sky Mobile for both 2021 and 2022, so we have included the year-on-year trend.

## Customer satisfaction

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- **Eighty-seven per cent of mobile customers were satisfied with their service overall in 2022, a decrease since 2021 (91%).** giffgaff and Tesco Mobile customers were more likely than average to be satisfied with their overall service (both 95%), while Virgin Mobile customers (81%) were less likely than average to be satisfied. Satisfaction levels were in line with the average for all other providers. O2 customers were less likely overall than in 2021 to be satisfied with their service.
- **Four per cent of mobile customers said they were dissatisfied with their service overall.** Four in ten of these (42%) said poor reception or coverage in an unspecified location was the main reason for their dissatisfaction.<sup>3</sup>
- **Tesco Mobile (92%) customers were more likely to be satisfied with their mobile reception or signal strength, compared to the average (81%).** Satisfaction on this measure for all other providers was in line with the average.
- **Eighty-two per cent of standalone mobile customers were satisfied with the value for money of their mobile service, a decrease since 2021 (85%).** giffgaff (93%) and Tesco Mobile (95%) customers were more likely to be satisfied with the value for money of their mobile services compared to the industry average (82%), while EE (74%) and Vodafone (76%) customers were less likely to be satisfied. All other providers were in line with the average.

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<sup>3</sup> Low base size (96), treat as indicative only.

- **giffgaff and Tesco Mobile customers were more likely than average to recommend their provider to a friend,<sup>4</sup> as in 2021, while EE, Three and Vodafone customers were less likely than average to do so.<sup>5</sup> In 2021, EE and Vodafone were in line with the average and Virgin Mobile had a lower than average ‘recommend to a friend’ score. Virgin Mobile therefore improved its position, while EE and Vodafone’s positions worsened in 2022.**

**Figure 1: Recommend to a friend: mobile providers**

	2022	2021
More likely to recommend		
Mobile average		
Less likely to recommend		

Source: [Ofcom Customer Satisfaction Tracker 2022](#).

## Complaints<sup>6</sup> and complaints handling<sup>7</sup>

- **Twelve per cent of mobile customers said they had a reason to complain<sup>8</sup> about their mobile service or provider in 2022, an increase compared with 2021 (9%).** BT (18%), Three (21%) and Vodafone (17%) customers were more likely than average to say they had a reason to complain. iD Mobile (4%), O2 (9%) and Tesco Mobile (7%) customers were less likely than average to have had a reason to complain. EE, Sky and Vodafone customers were all more likely than in 2021 to have had a reason to complain.

<sup>4</sup> Net Promoter Score TM (NPSTM), see Annex 2 for further details on how this metric is calculated. Full results can be found in the data tables [Ofcom Customer Satisfaction Tracker 2022](#).

<sup>5</sup> The average ‘recommend to a friend’ score in the mobile market in 2022 was 16. EE (12), giffgaff (41), O2 (13), Sky (15), Tesco Mobile (30), Three (10), Virgin Mobile (11) and Vodafone (8) all have scores that are between 0 and 50 and therefore considered ‘good’ based on global NPSTM standards.

<sup>6</sup> Source: [Ofcom Reason to Complain Tracker 2022](#)









<sup>7</sup> Source: [Ofcom Complaints Handling Tracker 2022](#)

<sup>8</sup> ‘Reason to complain’ is defined as respondents who said that they had a reason to complain in the last 12 months irrespective of whether they actually went on to make a complaint.



- **Of the 12% of mobile customers who said that they had a reason to complain about their mobile service, 71% went on to make a complaint.**
- **Where mobile customers had a reason to complain, the most common reason given was that their service was not performing as it should (47%),** for example because of poor connection quality or loss of service. This was followed by billing, pricing or payment issues (36%), and then dissatisfaction with customer service (22%). These were the same top three reasons as in 2021.
- **About half of mobile customers who made a complaint to their provider in 2022 (53%) were satisfied with the way their complaint was handled,** with 34% giving neutral responses and 13% dissatisfied.
- **Satisfaction levels with complaints handling were in line with the industry average for all providers,** and unchanged compared to 2021.
- **Just over two in five (43%) complaints made by customers were resolved on first contact,** with all providers in line with the average on this measure. This was unchanged since 2021, with no year-on-year change recorded by individual providers.

**Figure 2: Handling of mobile complaints**

	Average mobile								
Overall satisfaction with complaints handling	53%	55%	52%	53%	54%	50%	50%	54%	56%
Overall dissatisfaction with complaints handling*	13%	12%	11%	14%	11%	14%	15%	13%	13%
Complaints completely resolved on first contact	43%	44%	47%	42%	45%	43%	40%	42%	44%

**XX** Statistically significantly better than the sector average at the 95% confidence level for market research results.

**XX** Statistically significantly worse than the sector average at the 95% confidence level for market research results.

Sky Mobile was included as a mobile provider in our research trackers for the first time in this wave, therefore year-on-year comparisons are not available for this provider. Please see Annex 2 for more detail.

\*The remaining 34% of complainants were neutral. Please refer to the CHT qualitative research section of this report for more information on how satisfaction with complaints handling has been further investigated.

Source: [Ofcom Complaints Handling Tracker 2022](#) (see Note F & G in Annex 1 for more information)

## Complaints to Ofcom

- **EE, Sky Mobile and Tesco Mobile generated the fewest complaints to Ofcom per 100,000 subscribers in 2022.** BT Mobile generated the most complaints per 100,000 subscribers, with 14. The average number of complaints received in the year, per 100,000 subscribers, fell from ten in 2021 to eight in 2022.

Figure 3: Pay-monthly mobile complaints per 100,000 subscribers

### Pay-monthly mobile: Complaints per 100,000

	2022	2021
Fewest complaints		
Sky Mobile	5	6
Tesco Mobile	5	4
EE	6	5
Industry average	8	10
Vodafone	9	14
Three UK	9	14
iD Mobile	10	12
O2	10	9
Virgin Mobile	12	16
BT Mobile	14	8
Most complaints		

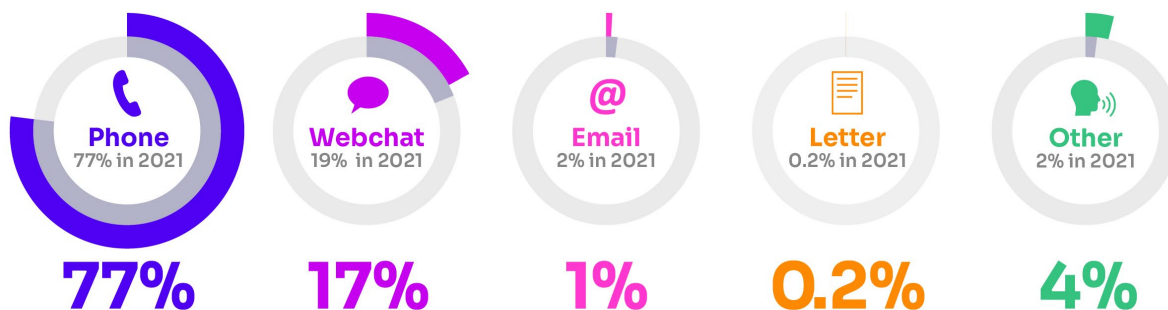
Source: Ofcom, 2022 and 2021

Notes: All figures are rounded to the nearest whole number; the industry average relates only to the providers included in the analysis. The actual measurable difference between the following providers' pay-monthly complaints per 100,000 subscribers is less than one, so their results should be considered comparable. In 2022, this was: 1. EE, Sky Mobile and Tesco Mobile; 2. Industry average and Vodafone; 3. iD Mobile, Three and Vodafone; and 4. iD Mobile, O2 and Three. In 2021, this was: 1. EE and Sky Mobile; 2. BT and O2; 3. Vodafone and Three.

## Customer contacts

- **Phone remained the most popular way for mobile customers to contact their provider**, accounting for 77% of contacts during the year, the same as in 2021. Webchat was the next most popular at 17%, down from 19% in 2021.

Figure 4: Customer contacts with mobile providers, by channel

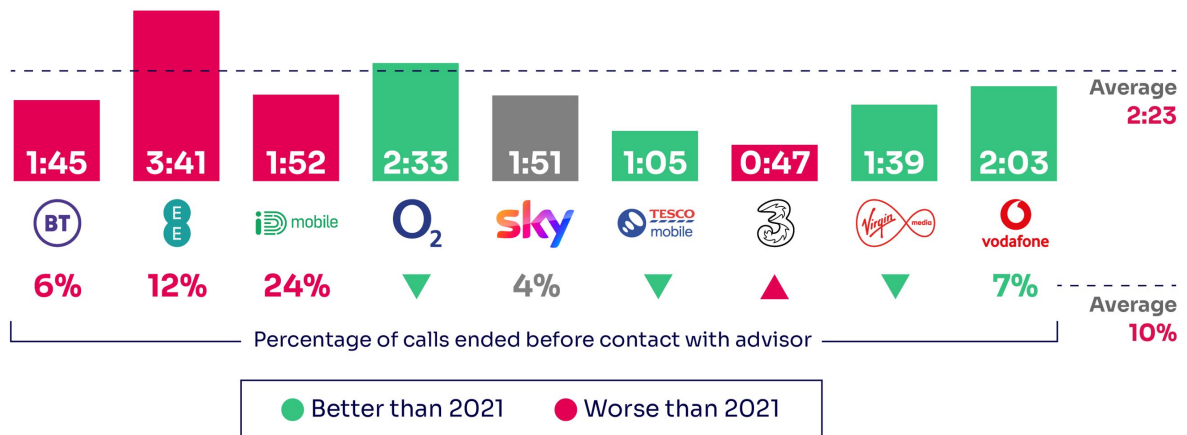


Source: Ofcom / provider data, 2022 and 2021

## Call waiting time and abandonment rate

- **There was an increase in the average call waiting time for mobile customers, from 2min 15s in 2021 to 2min 23s in 2022.**
- **Four providers out of the nine in our analysis managed to reduce their average call waiting times in 2022**, while for four, waiting times increased by more than ten seconds. O2 had the biggest decrease in actual call wait times, from an average of 3min 59s in 2021 to 2min 33s in 2022.
- **Among the providers for which comparable figures were available, EE had the longest average call waiting time for mobile customers, at 3min 41s in 2022.** Three again had the shortest average call waiting time, at 47s, although this was an increase by just over half a minute (31s) on its 2021 figure.
- **In 2022, 10% of calls were abandoned before the customer spoke to a customer service agent**, a slightly higher proportion than in 2021 (8%). Of the providers which submitted comparable data, Sky Mobile had the lowest abandonment rate at 3.7%, consistent with the figure in last year's report, followed by BT at 6.4%. iD Mobile had the highest abandonment rate, with just under a quarter of calls being abandoned (24.2%).






Figure 5: Average call waiting times and abandonment rates, by mobile provider



Source: Ofcom / provider data, 2022.

Notes: Abandonment rates are rounded to the nearest whole percentage. Only providers with comparable data were included in the average abandonment rate: BT, EE, iD Mobile, Sky Mobile and Vodafone. O2, Tesco Mobile, Three and Virgin Mobile were unable to provide comparable data for the abandonment rate, so only information about their performance compared to the previous year has been included. giffgaff does not have a call centre and therefore is not included. Lycamobile was again excluded as it did not provide comparable data on either metric. We are following this up separately to determine what action may be required. See Annex 3 for methodology.

### 3. Broadband customer service

	Average broadband			KCOM	NOW		Shell <sup>9</sup>	sky	TalkTalk For Everyone		
Satisfaction with service overall	82%	83%	85%	N/A	N/A	89%	N/A	82%	78%	81%	83%
Satisfaction with speed of service	80%	80%	81%	N/A	N/A	83%	N/A	80%	76%	82%	82%
Customers with a reason to complain	20%	19%	13%	N/A	10%	20%	N/A	18%	24%	25%	22%
Overall satisfaction with complaint handling	51%	55%	55%	N/A	N/A	53%↑	N/A	55%	46%	46%	49%
Ofcom complaints per 100,000 subscribers**	44↓	35↓	22↑	N/A	N/A	46↓	108	16↓	67↓	66↓	64
Average call waiting time (mm:ss)**	2:37	2:45↑	1:06↑	4:13↓	0:51↑	2:08	8:14	2:14↓	1:22↑	3:07↓	3:19↑

**XX** Statistically significantly better than the sector average at the 95% confidence level for market research results.

**XX** Statistically significantly worse than the sector average at the 95% confidence level for market research results.

↑ ↓ Significantly higher or lower than the previous year (2021) at the 99% confidence level for the Customer Satisfaction Tracker and the Reasons to Complain Tracker, and at the 95% confidence level for the Complaints Handling Tracker. Arrows also indicate the figure is higher or lower than the previous year (2021) for operator data.

\*\* Sector average is not comparable with previous year due to changes in the mix of the providers included in the analysis.

Note: Where a provider has a lower base size (noting that a provider's base size reflects its share of the relevant market), it is possible that despite a result being the same as, or close to that of the sector average and/or other providers, it is not statistically the same. This is due to a wider margin of error. For example, in the

<sup>9</sup> Data from Shell for 2022 included the migration of customers from the Post Office platform to the Shell Energy platform.

broadband sector this applies to the measure of satisfaction with complaints handling among BT's and EE's customers. The findings for both BT and EE have a wider margin of error when compared to Sky, as both have a lower base size than Sky. Hence the result for BT and EE, while the same as that for Sky, is not marked as significantly different to the average.

Results are marked 'N/A' where a provider was not included in the research trackers or where the sample size is too low for a finding to be included i.e. less than 50. See Annex 1 and 2 for further details on provider base sizes and significance testing. Call waiting times are calculated for landline and broadband service together. See Annex 3 for complaints to Ofcom and average call waiting times methodologies.

## Customer satisfaction

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- **In 2022, 82% of broadband customers were satisfied with their service overall**, unchanged since 2021. Plusnet customers were more likely than average to be satisfied with their overall service (89%). Satisfaction levels were in line with the average for all other providers.
- **Seven per cent of broadband customers said they were dissatisfied with their service overall.** The main reason for dissatisfaction among these broadband customers was unreliable connection (cited by 64% of dissatisfied users).
- **Four in five broadband customers (81%) were satisfied with the reliability of their service**, in line with 2021. Plusnet customers were more likely than average to be satisfied with their broadband reliability (87%), while TalkTalk (75%) and Virgin Media (77%) customers were less likely than average to be satisfied.
- **Eighty per cent of broadband customers were satisfied with the speed of their broadband service; all providers were in line with this average.**
- **Sixty-two per cent of standalone broadband customers were satisfied with the value for money of their broadband service**, consistent with 2021 (66%).<sup>10</sup>
- **EE, Plusnet and Sky customers were more likely than average to recommend their broadband provider to a friend**,<sup>11</sup> while BT and TalkTalk customers were less likely than average to do so.<sup>12</sup> In 2021, BT customers were more likely than average to

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<sup>10</sup> Satisfaction with value for money for their broadband service is asked of customers who purchase their broadband as a standalone service (i.e. not as part of a bundle package). Due to sample size, reporting is at a total standalone broadband level and not broken down by individual provider.

<sup>11</sup> Net Promoter Score TM (NPSTM): see Annex 2 for further details on how this metric is calculated. Full results can be found in the data tables [Ofcom Customer Satisfaction Tracker 2022](#).

<sup>12</sup> The average 'recommend to a friend' score in the broadband market in 2022 was 3. EE (14), Plusnet (24), Sky (8), Virgin Media (2) and Vodafone (1) have 'recommend to a friend' scores that are between 0 and 50 and therefore considered 'good' based on global NPS standards. BT's and TalkTalk's 'recommend to a friend' scores are below 0 at -2 and -13 respectively.

recommend their broadband provider, while Virgin Media customers were less likely. Therefore, while Virgin Media improved its relative position, BT worsened in 2022.

**Figure 6: Recommend to a friend: broadband providers**

	2022	2021
More likely to recommend		
Broadband average		
Less likely to recommend		

Source: [Ofcom Customer Satisfaction Tracker 2022](#).

Note: Vodafone was included for the first time in the 2022 wave due to reaching the minimum market share requirement.

## Complaints<sup>13</sup> and complaints handling<sup>14</sup>








- **One in five broadband customers (20%) said they had a reason to complain in 2022**, unchanged since 2021. As in last year’s report, Virgin Media customers (25%) were more likely than average to have had a reason to complain about their broadband service. In 2022, EE (13%), NOW Broadband (10%) and Sky (18%) customers were less likely than average to have had one.
- **Of the 20% of broadband customers who said that they had had a reason to complain about their mobile service, 76% went on to make a complaint.**
- **The most common reason why customers had a reason to complain about their broadband in 2022 was a service issue such as slow connection speeds or an intermittent or total loss of service (66%).** However, the proportion who cited this reason was lower than in 2021 (75%). This was followed by a billing, pricing or payment issue (25%), and problems relating to the installation/set-up of the service (15%), both of which were more commonly cited than in 2021 (16% and 10% respectively in 2021).

<sup>13</sup> Source: [Ofcom Reason to Complain Tracker 2022](#)

<sup>14</sup> Source: [Ofcom Complaints Handling Tracker 2022](#)

- **About half (51%) of customers who made a complaint to their broadband provider were satisfied with the way it was handled**, with 34% giving neutral responses and 15% dissatisfied.
- **Sky performed better than average on satisfaction with complaints handling (55%)**, while TalkTalk and Virgin Media performed below average (both 46%).
- **Satisfaction with complaints handling was unchanged compared to 2021**. Plusnet was the only provider to have a year-on-year change (53%, up from 43% in 2021).
- **The majority (61%) of complaints needed more than one contact to resolve the issue**. BT customers were more likely than average to have a complaint resolved on first contact (44% vs 39%), while TalkTalk and Virgin Media customers were less likely (34% and 33%, respectively). First-contact complaint resolution remained unchanged compared to 2021.

**Figure 7: Handling of broadband complaints**

	Average broadband							
Overall satisfaction with complaints handling	51%	55%	55%	53% <sup>XX</sup>	55%	46%	46%	49%
Overall dissatisfaction with complaints handling*	15%	14%	11%	15%	9%	21%	18%	20%
Complaints completely resolved on first contact	39%	44%	39%	37%	41%	34%	33%	38%

**XX** Statistically significantly better than the sector average at the 95% confidence level for market research results.

**XX** Statistically significantly worse than the sector average at the 95% confidence level for market research results.

*Note: Where a provider has a lower base size (noting that a provider's base size reflects its share of the relevant market), it is possible that despite a result the same as, or close to that of the sector average and/or other providers, it is not statistically the same. This is due to a wider margin of error. For example, in the broadband sector this applies to the measure of satisfaction with complaints handling among BT's and EE's customers. BT's and EE's finding has a wider margin of error when compared to Sky, as both have a lower base size. Hence the result for BT and EE, while the same as Sky, is not marked as significantly different to the average.*

\* The remaining 34% of complainants were neutral. Please refer to the CHT qualitative research section of this report for more information on how satisfaction with complaints handling has been further investigated.

Source: [Ofcom Complaints Handling Tracker 2022](#) (see Note M & N in Annex 1 for more information)



## Complaints to Ofcom

- In 2022, Sky generated the fewest broadband complaints to Ofcom per 100,000 subscribers (16). Shell Energy generated the most complaints per 100,000 subscribers, at 108. The average number of broadband complaints per 100,000 subscribers was 44 in 2022, with all providers except EE (excluding Shell Energy) generating the same amount of, or fewer, complaints than in 2021.

Figure 8: Broadband complaints per 100,000 subscribers

### Fixed broadband: Complaints per 100,000

Fewest complaints	2022	2021
Sky	16	21
EE	22	20
BT	35	42
Industry average	44	N/A
Plusnet	46	56
Vodafone	64	64
Virgin Media	66	78
TalkTalk	67	75
Shell Energy	108	N/A
Most complaints		

Source: Ofcom, 2022 and 2021

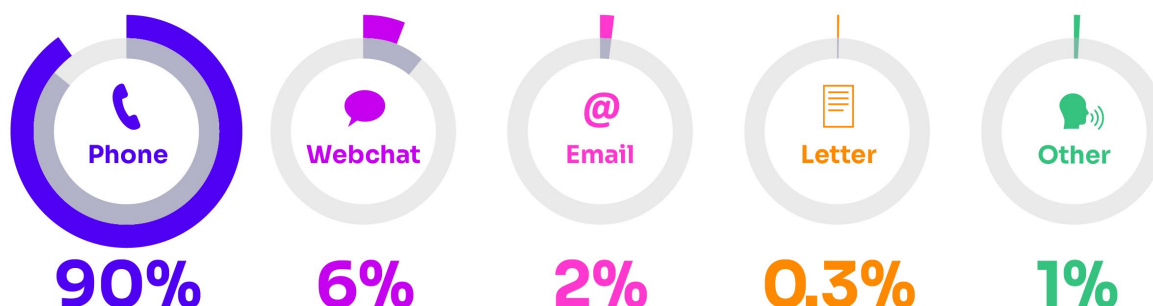
Notes: All figures are rounded to the nearest whole number; the industry average relates only to the providers included in the analysis. Providers that did not have a consistent market share of over 1.5% in 2021/22 (e.g. NOW Broadband) were not included in the analysis. Due to change in the providers included in the analysis (namely the inclusion of Shell Energy), the industry average is not comparable with 2021.

## Customer contacts

- Phone was the most popular method of contact for landline and broadband customers in 2022, accounting for an average of 90% of customer contacts across

providers. The next most popular method of contact was webchat, with 6% of the total.<sup>15</sup>

**Figure 9: Customer contacts with broadband and landline providers, by channel**



Source: Ofcom / provider data, 2022

Notes: Due to change in the providers included in the analysis (namely the inclusion of Shell Energy), the industry average is not comparable with the previous year.

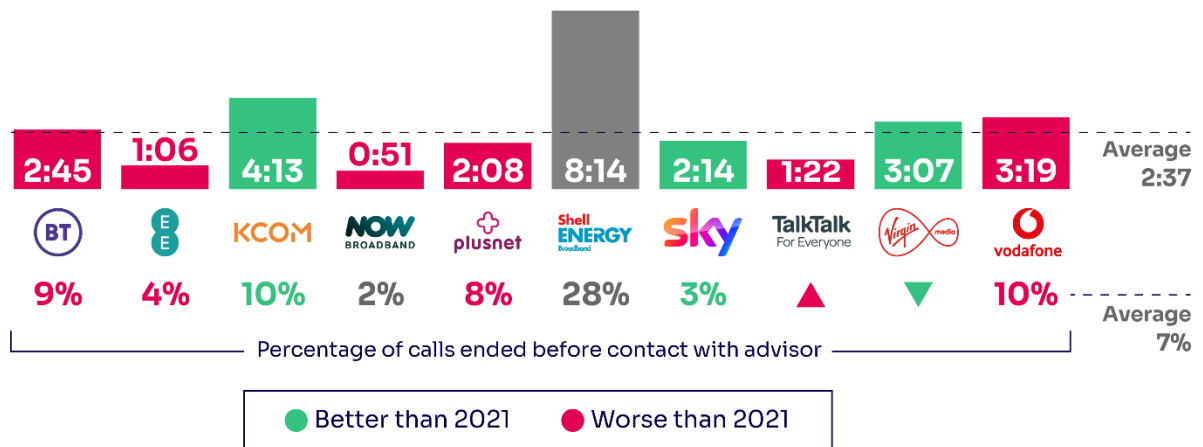
## Call waiting time and abandonment rate<sup>16</sup>

- **The industry average call waiting time for broadband and landline providers was 2min 37s in 2022.**
- **Half of the broadband and landline providers in our analysis had an increase in their average call waiting times compared to 2021**, but KCOM, Sky and Virgin Media reduced theirs by 53%, 2% and 17% respectively. Vodafone had the biggest increase in average call waiting times, up by 155% from 1min 18s in 2021 to 3min 19s in 2022.
- **NOW Broadband customers had the shortest average call waiting time in 2022**, at 51s, although this was increase on its average for the previous year. Shell Energy had the longest average call waiting time in 2022 at 8min 14s.
- **In 2022, 7% of calls were abandoned before the customer spoke to a customer service advisor.** Of the providers which submitted comparable data, NOW Broadband and Sky had the lowest call abandonment rates, while Shell Energy had the highest. Among those whose data were not comparable, Virgin Media's abandonment rates improved in 2022 while TalkTalk's worsened.

<sup>15</sup> Due to change in the providers included in the analysis (namely the inclusion of Shell Energy) the industry average for customer contacts with broadband and landline providers by channel is not comparable with the previous year.

<sup>16</sup> Due to change in the providers included in the analysis (namely the inclusion of Shell Energy), the industry averages for broadband and landline providers' call waiting time and abandonment rate are not comparable with the previous year.











Figure 10: Average call waiting times and abandonment rates, by broadband and landline provider



Source: Ofcom / provider data, 2022.

Notes: Abandonment rates are rounded to the nearest whole number. When the actual measurable difference between providers is less than one, their results should be considered comparable. Due to changes in the providers included in the analysis (namely the inclusion of Shell Energy), the industry average is not comparable with the previous year. TalkTalk and Virgin Media were unable to provide comparable data about the percentage of calls that ended before contact with advisor, so only information about their performance compared to the previous year has been included. See Annex 3 for methodology.

## 4. Landline customer service

	Average landline										
Satisfaction with service overall	77%	78%	90%	N/A	N/A	78%	N/A	77%	73%	70%	77%
Customers with a reason to complain	7% <sup>↑</sup>	7%	6%	N/A	2%	6%	N/A	6% <sup>↑</sup>	10%	7%	8%
Overall satisfaction with complaint handling	51%	51%	56%	N/A	N/A	51%*	N/A	53%	44%	51%	52%
Ofcom complaints per 100,000 subscribers**	26 <sup>↓</sup>	22 <sup>↓</sup>	10 <sup>↓</sup>	N/A	N/A	29 <sup>↓</sup>	87	9 <sup>↓</sup>	42 <sup>↓</sup>	40 <sup>↓</sup>	33 <sup>↑</sup>
Average call waiting time (mm:ss) <sup>17**</sup>	2:37	2:45 <sup>↑</sup>	1:06 <sup>↑</sup>	4:13 <sup>↓</sup>	0:51 <sup>↑</sup>	2:08	8:14	2:14 <sup>↓</sup>	1:22 <sup>↑</sup>	3:07 <sup>↓</sup>	3:19 <sup>↑</sup>

**XX** Statistically significantly better than the sector average at the 95% confidence level for market research results.

**XX** Statistically significantly worse than the sector average at the 95% confidence level for market research results.

<sup>↑</sup> <sup>↓</sup> Significantly higher or lower than the previous year (2021) at the 99% confidence level for the Customer Satisfaction Tracker and the Reasons to Complain Tracker, and at the 95% confidence level for the Complaints Handling Tracker. Arrows also indicate the figure is higher or lower than the previous year (2021) for operator data.

\*Satisfaction with complaints handling: Plusnet had a low base size for this measure (70), associated with a wide margin of error, so results should be treated as indicative only.

\*\* Sector average is not comparable with previous year due to changes in the mix of the providers included in the analysis.

<sup>17</sup> Call waiting times are calculated for landline and broadband service together. Please see broadband section for further details on landline providers' average call waiting times and call abandonment rates.

*Note: Where a provider has a lower base size (noting that a provider's base size reflects its share of the relevant market), it is possible that despite a result the same as, or close to, that of the sector average and/or other providers, it is not statistically the same. This is due to a wider margin of error.*

*Results are marked 'N/A' if a provider was not included in the research trackers or where the sample size is too low for a finding to be included i.e. less than 50. See Annex 1 and 2 for further details on provider base sizes and significance testing. See Annex 3 for complaints to Ofcom and average call waiting times methodologies.*

*Vodafone was included as a landline provider in our research trackers for the first time in this wave, therefore year-on-year comparisons are not available for this provider. Please see Annex 2 for more detail.*

## Customer satisfaction

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- **In 2022, just over three-quarters of landline customers (77%) were satisfied with their overall service**, in line with 2021. EE customers were more likely than average to be satisfied (90%), while Virgin Media customers were less likely than average to be satisfied (70%).
- **Four per cent of landline customers said they were dissatisfied with their service overall.** The main reason given for dissatisfaction among these landline customers was that the service was poor or unreliable (40%).<sup>18</sup> This differs from 2021, when the main reason for dissatisfaction was that the service was too expensive or not good value for money.<sup>19</sup>
- **Over four in five landline customers were satisfied with the reliability of their service (84%).** EE customers were more likely than average to be satisfied with the reliability of their landline (91%), while Vodafone's customers were less likely to be (76%).
- **Sixty-eight per cent of standalone landline customers were satisfied with the value for money of their landline service, consistent with 2021 (62%).**<sup>20</sup>
- **In 2022, EE, Plusnet and Sky customers were more likely than average to recommend their landline provider to a friend,<sup>21</sup> while BT, TalkTalk, Virgin Media**

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<sup>18</sup> Low base size (97), treat as indicative only.



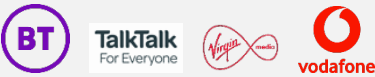

<sup>19</sup> Fieldwork was conducted in November-December 2022, before any 2023 inflation linked in-contract price rises came into effect.

<sup>20</sup> Satisfaction with value for money for their landline service is asked of customers who purchase their landline as a standalone service (i.e. not as part of a bundle package). Due to sample size, reporting is at a total standalone landline level and not broken down by individual provider.

<sup>21</sup> Net Promoter Score TM (NPSTM), see Annex 2 for further details on how this metric is calculated. Full results can be found in the data tables [Ofcom Customer Satisfaction Tracker 2022](#).

and Vodafone customers were less likely than average to do so.<sup>22</sup> In 2021, BT, EE, Plusnet and Sky were more likely than average, and TalkTalk and Virgin Media were less likely than average, on this measure. BT’s relative position had therefore worsened in 2022.

**Figure 11: Recommend to a friend: landline providers**

	2022	2021
More likely to recommend		
Landline average		
Less likely to recommend		

Source: [Ofcom Customer Satisfaction Tracker 2022](#).

## Complaints<sup>23</sup> and complaints handling<sup>24</sup>

- **Seven per cent of landline customers said they had a reason to complain in 2022, a higher proportion than in 2021 (5%).** TalkTalk customers were more likely than average to have had a reason to complain (10%). Compared with 2021, Sky landline customers (6% in 2022 vs 3% in 2021) were more likely to say they had a reason to complain.
- **Of the 7% of landline customers who said that they had a reason to complain about their mobile service, 78% went on to make a complaint. The most common cause for landline customers to have had a reason to complain about their service or provider related to a service issue such as poor call line quality or loss of service (46%).** This was also the top reason in 2021. The proportion of landline customers with a reason to complain, who said it was a problem with a repair to their service, increased in 2022 (33% vs 22% in 2021).

<sup>22</sup> The average ‘recommend to a friend’ score in the landline market in 2022 was 1. EE (24) Plusnet (14) and Sky (8) have ‘recommend to a friend’ scores that are between 0 and 50 and therefore considered ‘good’ based on global NPS standards. BT (-6), TalkTalk (-10), Virgin Media’s (-5) and Vodafone’s (-6) ‘recommend to a friend’ scores are below 0.

<sup>23</sup> Source: [Ofcom Reason to Complain Tracker 2022](#)

<sup>24</sup> Source: [Ofcom Complaints Handling Tracker 2022](#)

- **About half (51%) of landline customers who made a complaint to their provider were satisfied with how it was handled**, with 34% giving neutral responses and 15% dissatisfied. TalkTalk performed lower than average on this measure (44%), while all other providers were in line with the average.
- **Landline complaint handling satisfaction was unchanged since 2021**, with no provider seeing a year-on-year change.
- **About two in five (42%) landline complaints were resolved on first contact**. EE landline customers were more likely than average to have had a complaint resolved on first contact, and its position on this measure had improved since 2021 (53% compared with 39% in 2021).

**Figure 12: Handling of landline complaints**

	Average landline	BT	EE	plusnet	sky	TalkTalk For Everyone	Virgin	vodafone
Overall satisfaction with complaints handling	51%	51%	56%	51%*	53%	44%	51%	52%
Overall dissatisfaction with complaints handling**	15%	15%	8%	17%	13%	19%	15%	17%
Complaints completely resolved on first contact	42%	44%	53% ↑	34%	43%	39%	41%	41%

**XX** Statistically significantly better than the sector average at the 95% confidence level for market research results.

**XX** Statistically significantly worse than the sector average at the 95% confidence level for market research results.

\* low base size (70), treat as indicative only.

\*\* The remaining 34% of complainants were neutral. Please refer to the CHT qualitative research section of this report for more information on how satisfaction with complaints handling has been further investigated.

Vodafone was included as a landline provider in our research trackers for the first time in this wave, therefore year-on-year comparisons are not available for this provider. Please see Annex 2 for more detail.

Source: [Ofcom Complaints Handling Tracker 2022](#) (see Note S & T in Annex 1 for more information)

## Complaints to Ofcom

- **EE and Sky generated the fewest landline complaints to Ofcom per 100,000 subscribers in 2022.** Shell Energy generated the most complaints per 100,000 subscribers, at 87. The average number of landline complaints per 100,000 subscribers was 26 in 2022.

Figure 13: Landline complaints per 100,000 subscribers

### Landline: Complaints per 100,000

Fewest complaints	2022	2021
Sky	9	14
EE	10	12
BT	22	27
<b>Industry average</b>	<b>26</b>	<b>N/A</b>
Plusnet	29	34
Vodafone	33	28
Virgin Media	40	46
TalkTalk	42	51
Shell Energy	87	N/A
Most complaints		

Source: Ofcom, 2022 and 2021









Notes: All figures are rounded to the nearest whole number; the industry average relates only to the providers included in the analysis.

The actual measurable difference between the following providers' landline complaints per 100,000 subscribers is less than one, so their results should be considered comparable. In 2022, this was EE and Sky. In 2021, this was BT and Vodafone.

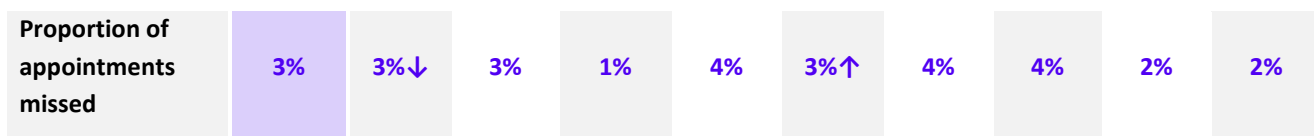
Providers that did not have a consistent market share of over 1.5% in 2021/22 (e.g. NOW Broadband) were not included in the analysis. Due to a change in the providers included in the analysis (namely the inclusion of Shell Energy), the industry average is not comparable with 2021.



## 5. Broadband and landline: provisioning and repair

	Average									
Average days to complete an order (all provisions)	11↓	9↓	14↑	9↑	14	14	14	16↑	3↓	17↑
Average days to switch to a new provider	14	14	15	15↑	14	16↑	14	15↑	10	17↑
Average days to deliver a change of service (same provider)	5↓ <sup>25</sup>	7	12↑	8	12	9↑	13↑	20↑	0	4↑
Average days to deliver a home move (same provider)	14	14	15↑	10	N/A	16	N/A	14	11	15
Proportion of orders completed by date agreed	88%	89%↓	95%↑	95%↓	91%↓	86%↑	95%↑	89%	82%	68%↓
Faults per 1000 customers per month: 2022	41↓	46↓	46↓	28↑	22↓	20↓	25↓	38↓	55↑	60↓
Average time to repair a total loss of service (days)	2	2	4↑	0	2	3↑	2	2	1	1
Proportion of re-contacts	4%↓	16%↓	16%	1%↓	2%↓	1%↑	4%↓	6%↓	3%	15%↑

<sup>25</sup> BT and Virgin Media increased the number of package changes between 2021 and 2022; Virgin Media in particular. This has reduced the overall average, as the number of 0-day package changes (from Virgin Media) is higher than in the previous year.



Source: Ofcom / provider data, 2022. See Annex 3 for methodology.

↑ ↓ Higher or lower than the previous year (2021).

## Getting a new service

- **Across all provision types, landline and broadband orders took an average of 11 days to complete.**<sup>26</sup> This is a day quicker, on average, than in 2021. As in 2022, customer orders for a change to an existing service with their current provider (such as an upgrade to a higher-speed service) were completed more quickly (five days), on average, than home moves or a change of service to a new provider (14 days).
- **Overall, providers reported that in 2022, 88% of all landline and broadband orders were delivered by the date agreed.** When a customer was moving home or changing package while keeping the same provider, 84% of these types of orders were delivered by the agreed date.
- **Virgin Media was the fastest to provide a service overall, at three days, and also the fastest at providing a new service to a new customer, taking on average ten days.** However, Virgin Media is not required to wait for a minimum of ten working days before a new service can be switched to it, which explains the difference in timescales between it and other providers. BT and Virgin Media were the only providers to provide a new service more quickly in 2022 than in 2021, with a reduction of one day.
- **Vodafone completed the lowest proportion of orders on the date agreed,** at 68%, a drop from the previous year. EE, KCOM and Sky completed the highest proportion of orders on the date agreed, at 95%. The biggest improvement across providers was by Plusnet, which completed 86% of orders on the date agreed, up from 81% in 2021.
- **Fibre-to-the-cabinet (FTTC) services were installed quickest, taking an average of 13 days to complete.** This was faster than fibre-to-the-premises (FTTP) (about 2 weeks on

<sup>26</sup> Switches between providers using the Openreach or KCOM copper networks (including fibre-to-the-cabinet) currently follow a process which includes a minimum lead time of at least ten working days. This gives time for customers to stop the switch if they have not agreed to it or have changed their mind (for example, if they are told they need to pay an early termination charge). A new quicker switching process for landline and broadband services, One Touch Switch (OTS), was due to be used from 3 April 2023, but because of industry delays the existing process will now continue until OTS is launched.

average).<sup>27</sup> Across all providers, and across all provision types, FTTC was completed most quickly by BT, with an average of eight days, while Vodafone was the slowest at 16 days.

## Fault repair

### Number of faults

- **Across the major broadband and landline providers, there were on average 41 faults a month, of any kind, per 1,000 customers in 2022, lower than in 2021.** This includes any landline or broadband fault that took place in 2022, not just those which resulted in a total loss of service.
- **Despite an improvement since last year's report, Vodafone still had the highest number of faults per 1,000 customers, at 60 faults per month, compared to 67 faults per month the previous year.** Plusnet had the lowest number, at 20 per month, improving from 23 faults per month the previous year.
- **Virgin Media had the largest increase in the monthly average number of faults per 1,000 customers in 2022,** from 40 to 55 faults per 1,000 customers per month. All the other providers (excluding KCOM), which reported data for both years, reported fewer faults a month per 1,000 customers compared to 2021.

Figure 143: Number of faults per 1,000 customers per month

	Average	BT	EE	KCOM	NOW	plusnet	sky	TalkTalk For Everyone	Virgin Media	vodafone
Faults per 1000 customers per month: 2021	44	50	57	27	32	23	41	47	40	67
Faults per 1000 customers per month: 2022	41↓	46↓	46↓	28↑	22↓	20↓	25↓	38↓	55↑	60↓

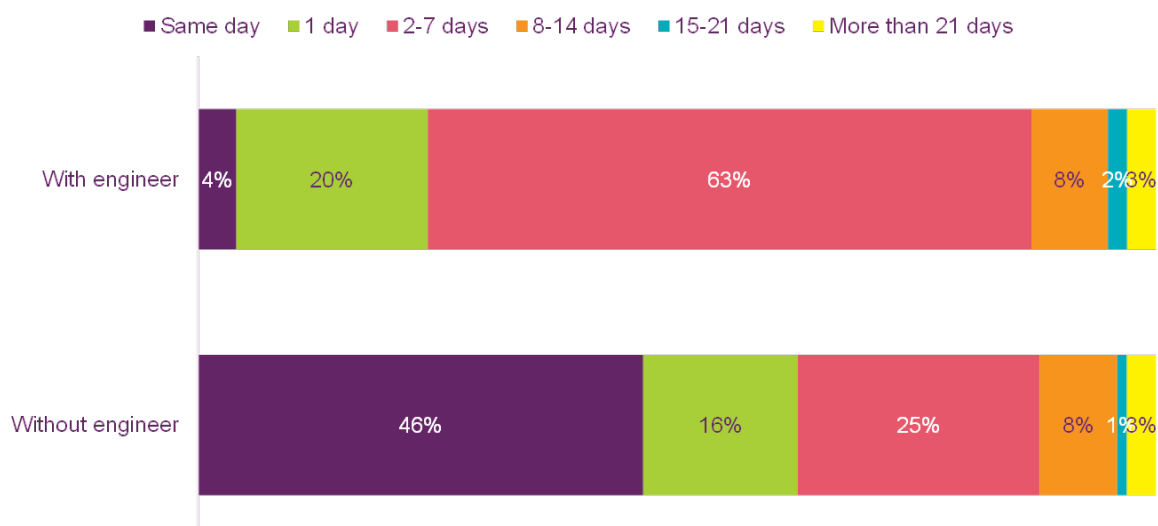
Source: Ofcom / provider data, 2021/2022. EE's 2021 figure has been updated since previous publication. See Annex 3 for methodology.

<sup>27</sup> ADSL stands for asymmetric digital subscriber line and is broadband delivered through the copper wires of the phone line. There are two types of fibre broadband: 'fibre-to-the-cabinet' (FTTC) and 'fibre-to-the-premises' (FTTP). With fibre-to-the-cabinet, fibre optic cables run from the telephone exchange to street cabinets before using standard copper telephone wires to connect to homes. Fibre-to-the-premises broadband involves fibre optic cables running directly to the home.

## Fault repair times<sup>28</sup>

- **On average in 2022, providers took two days to fix faults when there was a total loss of service.** KCOM was the quickest when there was a total loss of service; on average it was able to resolve faults within one day. This is unchanged since 2021. EE and Plusnet both took an extra day to fix a total loss of service fault compared to the previous year. There were no differences in time taken for the other providers compared to the year before.
- **The time taken to fix a fault can depend on whether an engineer is required.** Long resolution/repair times may be because the provider needs access to a building or permission to dig up a street to repair cables. If an engineer was required, it typically took two days longer to have the fault resolved than if an engineer was not needed.

**Figure 154: Distribution of repair times with / without an engineer visit**

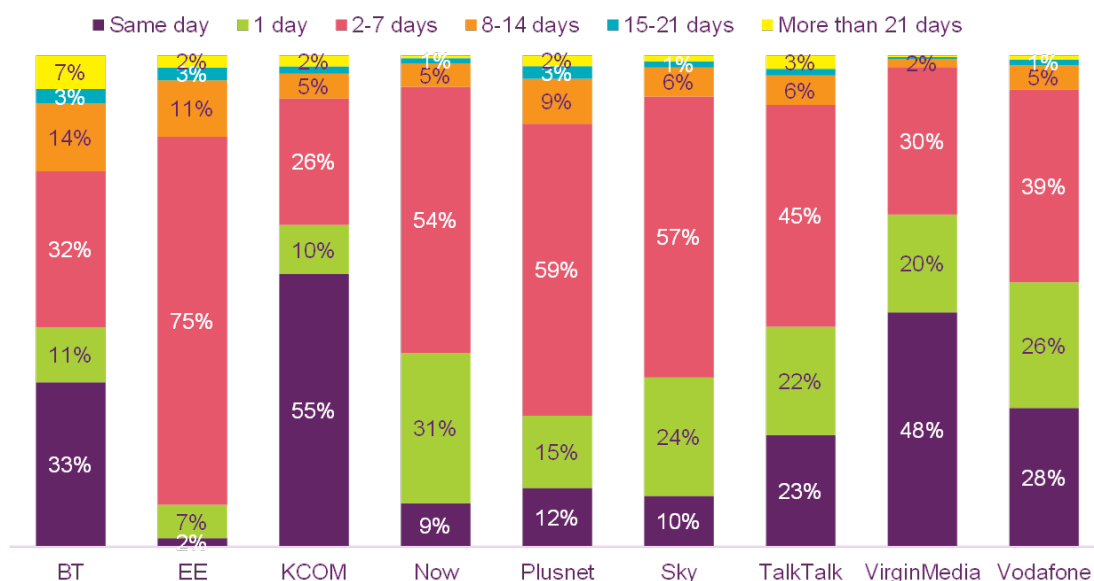


Source: Ofcom / provider data, 2022. See Annex 3 for methodology.

- **Eighty-seven per cent of total loss-of-service faults were resolved within a week;** Virgin Media resolved 98% of its faults within a week.
- **Despite an improvement on the previous year, BT resolved the lowest proportion of total loss-of-service faults within a week, at 76%,** and had the highest proportion of faults that took longer than 21 days to resolve (7%).

**Figure 165: Distribution of repair times, by provider**

<sup>28</sup> Although many companies use the same underlying Openreach infrastructure to provide a service, there are different service agreements available from Openreach, which can affect repair times.












Source: Ofcom / provider data, 2022. See Annex 3 for methodology.

- **Overall, the proportion of re-contacts in a year fell from 15% to 4% of customers having to re-contact about their fault. BT and EE had the highest proportion of re-contacts, with 16% of customers having to re-contact about their fault. KCOM and Plusnet had the lowest proportion of re-contacts, at only 1% of customers.**

## Missed appointments

- **Overall, 3% of repair and provision appointments were missed in 2022.**<sup>4</sup> NOW Broadband, Sky and TalkTalk had the highest proportion of missed appointments, while KCOM had the lowest proportion, at 1%.
- **The proportion of missed appointments between repair and installations were similar, at 3%.** EE, Sky, TalkTalk and Virgin Media missed the highest proportion of provision appointments in 2022 (4%) and Sky and NOW Broadband also missed the highest proportion of repair appointments (5%).
- **The proportion of total appointments missed is consistent with 2021, at 3%.** BT improved slightly, down from 4% to 3%. NOW Broadband, Plusnet and Sky all missed a higher proportion of appointments in 2022 than in 2021.

Figure 17: Proportion of appointments missed, by provider: 2022

	Average									
Proportion of appointments missed	3%	3%↓	3%	1%	4%	3%↑	4%	4%	2%	2%
Proportion of provision appointments missed	3%	1%↓	4%↓	0%	3%↑	2%↑	4%↑	4%↑	4%↑	2%
Proportion of repair appointments missed	3%	4%	2%↑	2%↓	5%↓	4%↑	5%↑	3%↓	0%↓	2%

Source: Ofcom analysis of provider data, 2022. See Annex 3 for methodology.

Note: All figures are rounded to the nearest whole number. When the actual measurable difference between providers is less than one, their results should be considered comparable.

## 6. Automatic compensation scheme

The automatic compensation scheme requires that signatories pay compensation to landline and broadband customers, without the customer having to ask for it, in the event of delayed repairs following a total loss of service, missed repair or provisioning appointments, and where there are delays to the start of a new service.

Ten providers are now signed up to the scheme.<sup>29</sup> Plusnet joined the scheme most recently, in May 2022. At the end of 2022, 89% of landline and 93% of broadband customers were covered by the scheme.

The level of automatic compensation to be paid under the scheme increased on 1 April 2022 in line with the Consumer Price Index (CPI) as of 31 October 2021.<sup>30</sup> The increased compensation levels applied to any new service issues that occurred from 1 April 2022 onwards.

In 2022, over £60m was paid in automatic compensation, with around 1.34 million payments being made across all three service issues. This does not include compensation paid outside the scheme.

**Figure 18: Amount of automatic compensation paid**

Service issue	Amount of automatic compensation paid 2022	Year-on-year change £m (%)
<b>Delayed repair following loss of service</b>	£21.6m	-£1.2m (-5%)
<b>Missed appointments</b>	£5.9m	-£0.5m (-8%)
<b>Delayed provision of a new service</b>	£32.5m	+£3.2m (11%)

Source: Ofcom analysis of provider data, 2022. See Annex 3 for methodology.

Despite an increase in the number of providers signed up to the scheme, it is encouraging to see a decrease in the volume of payments for delayed repairs and missed appointments, indicating fewer instances when things went wrong. However, the volume of payments for delayed provision of a new service increased by 17%, so there is still room for improvement. This resulted in a slight

<sup>29</sup> The following providers are signed up to the automatic compensation scheme: BT (April 2019), EE (May 2021), Hyperoptic (October 2018), Plusnet (May 2022), Sky (April 2019; includes NOW Broadband), TalkTalk (April 2019), Utility Warehouse (February 2020), Virgin Media (April 2019), Vodafone (November 2021) and Zen Internet (April 2019). John Lewis Broadband customers were previously covered under the scheme as the service was provided by Plusnet. John Lewis Broadband has closed.

<sup>30</sup> On 1 April 2022, automatic compensation levels increased from: £8.06 to £8.40 per day for delayed repairs; £25.18 to £26.24 for missed appointments; and £5.04 to £5.25 per day for delayed provisions.

increase in overall volumes and the total automatic compensation paid to customers between 2021 and 2022.

**Figure 19: Number of automatic compensation payments made**

Service issue	Volume of automatic compensation payments 2022	Year-on-year change (%)
<b>Delayed repair following loss of service</b>	601,000	-3,000 (-1%)
<b>Missed appointment</b>	229,000	-25,000 (-10%)
<b>Delayed provision of a new service</b>	512,000	+76,000 (17%)

*Source: Ofcom analysis of provider data, 2022. All figures are rounded to the nearest 1,000. See Annex 3 for methodology.*

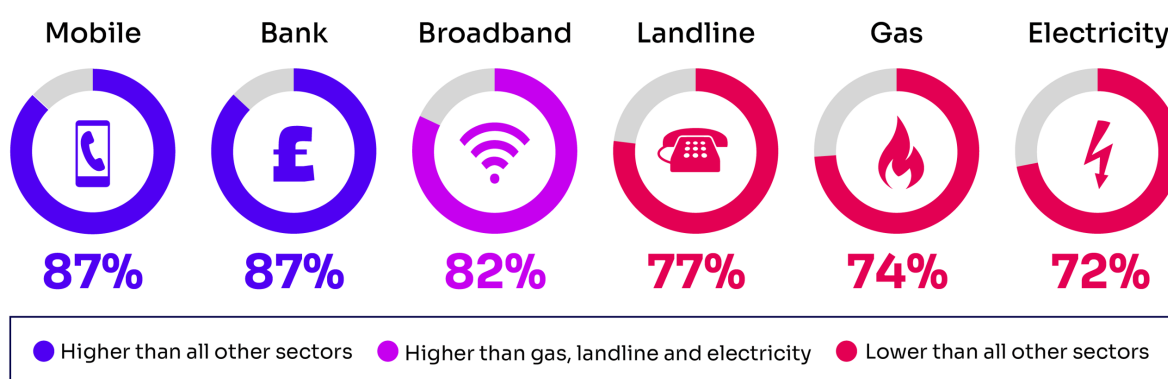
The scheme continues to provide important automatic redress for consumers when things go wrong with their broadband and landline services. Ofcom continues to encourage those providers which are not already part of the scheme to sign up.



## 7. Comparison with other sectors

Mobile customers' satisfaction with their overall service was in line with that among banking customers when asked about their main bank account (both 87%), and higher than that among broadband (82%), gas (74%), landline (77%) and electricity (72%) customers. Broadband customers were more likely to be satisfied with their overall service when compared to gas, landline, and electricity customers.

**Figure 20: Overall satisfaction with services from communications providers, compared to bank account and energy providers**



Source: [Ofcom Customer Satisfaction Tracker 2022](#). (see Note A in Annex 1 for more details).

## 8. A closer look into customer satisfaction with complaints handling

Our 2021 [Fairness for Customers commitments progress review](#) identified satisfaction with complaints handling as an area of concern, and called on telecoms providers to take steps to improve it, as a priority. In our 2022 and 2021 CCS reports, we noted our disappointment with the levels of customer satisfaction with complaint handling. We encouraged providers do more to improve customer service and put treating customers fairly at the heart of their business.

In the light of this ongoing concern, we sought to gain a deeper understanding of consumers' experiences of complaints handling, and to explore the factors that contributed to positive, and less positive, experiences. We conducted a key driver analysis of our Complaints Handling Tracker data, and commissioned qualitative research among customers who had contacted their provider with a complaint in the previous six months of fieldwork, recruited from our tracker sample. Our qualitative research included complainants to a range of landline, mobile, fixed broadband and pay-TV providers and included some who were vulnerable customers. More detailed findings from the qualitative research can be seen [here](#).

As noted earlier in this report, our latest Complaints Handling Tracker research found that in 2022 about half of the fixed broadband (51%), landline (51%) and mobile (53%) customers who contacted their provider with a complaint were satisfied with how their complaint was handled. About a third of customers (34% in each sector) provided a neutral score, rating the service they received as neither satisfactory nor unsatisfactory. Levels of dissatisfaction with how the complaint was handled was 15% for landline, 15% for fixed broadband and 13% for mobile.

Although the levels of satisfaction with complaints handling in 2022 were broadly in line with 2021, we remain concerned that providers have not responded to our earlier calls to prioritise service improvements. We consider good customer service to be an essential component of a fair culture. As noted in our Fairness for Customers commitments progress review, embedding a culture of fairness across a business can help to address existing consumer issues and prevent new unfair practices from arising.

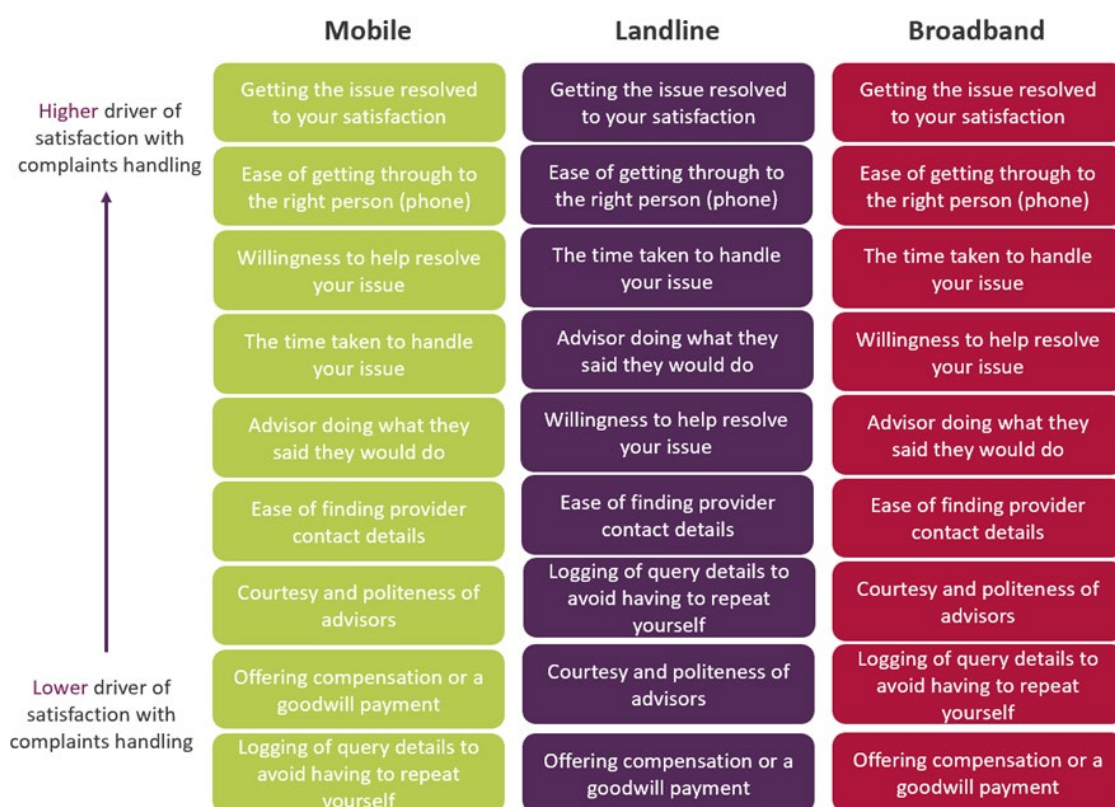
In this section, we set out the factors that our research identified which contribute to higher satisfaction with complaints handling, and the areas where we encourage providers to focus, to improve their complaints handling processes. We also take a closer look at the experience of vulnerable customers, given the requirements on providers to have policies and procedures in place to ensure that vulnerable customers are treated fairly.

### Factors that contribute to higher satisfaction with complaints handling

Our Complaints Handling Tracker provides a measure of satisfaction with overall complaints handling, and with nine individual aspects of the complaints handling process, as listed in Figure 1 below. To better understand what drives overall satisfaction with complaints handling, and the

relative importance of each measure, we conducted a key driver analysis.<sup>31</sup> This analysis identified that all nine elements of the customer complaints experience that we asked about were positively related to satisfaction with complaint handling, so are all important in contributing to a positive customer experience. Some elements, however, are more likely than others to drive overall satisfaction. As shown below, for mobile, landline and broadband complainants, getting the issue resolved to their satisfaction was the highest relative driver of satisfaction with complaints handling, followed by ease of getting through to the right person (for those contacting via phone).

**Figure 21: Drivers of satisfaction with complaint handling**



Source: Ofcom Complaints Handling Tracker, 2022

Our qualitative research supports these findings. Participants told us that, among other aspects, the time and the effort required on their part to resolve the issue had a significant bearing on their level

<sup>31</sup> This analysis took the data from Q10 in the Complaints Handling Tracker which asks complainants about their level of satisfaction with nine specific elements of the complaint handling experience. To determine the key drivers of satisfaction, a regression analysis was conducted using SPSS where Q9 (overall satisfaction) was the dependent variable, and Q10 gave the predictors. All predictors were significant at the 95% confidence level, and the resulting R2 value for each model was between 0.68 and 0.72, suggesting the model gave a good indication of the drivers of overall satisfaction.

of satisfaction with the process. They also indicated that being listened to and understood, and having their complaint resolved at first contact, were likely to leave them happier with the process.

Other factors that were important for a positive experience included: complainants being kept informed of the progress/ status of their complaint (if ongoing); whether expectations were well managed (e.g. no over-promising) and whether providers did what they said they were going to do. Also important was whether the call handler remained courteous, the complaint was logged well/ appropriately (to avoid repetition with other call handlers) and, in some cases, if compensation was offered.

While complaint resolution is important to overall satisfaction, our qualitative research identified that for some, a positive call experience could mitigate against the disappointment of an unresolved complaint. Although participants whose complaints were not resolved might have felt frustrated by this, they could still have a positive call experience if the complaint was thought to have been handled well, for example when they felt listened to, were helped, and were treated professionally. If the complaint was not perceived to have been handled well, this exacerbated the dissatisfaction with the unresolved complaint.

## **Areas where providers should focus to improve the complaints handling process**

Our qualitative research also sought to understand the steps providers could take to improve their complaints handling processes. Areas where participants thought providers could improve their experience included having a better call centre experience: call waiting times, getting through to the right person quickly, and dealing with the complaint first time whenever possible were all identified as factors that could be improved. Also mentioned were improved communications, in terms of the effort taken to understand the complaint, keeping customers updated about the complaint progress, and giving customers solutions or options where appropriate. In some cases, where it was not already offered by providers, respondents felt that compensation would have improved their experience, in recognition of the inconvenience they had experienced.

As a relatively high proportion of respondents to our Complaints Handling Tracker had reported feeling neutral about their experience (34%), our qualitative research also sought to gain a better understanding of the reasons behind neutral responses. We found that 'neutral' participants tended to have a mix of both positive and negative experiences throughout their contact. Beyond this, the research did not find any predominant factors which contributed towards a neutral experience.

However, we consider that the proportion of customers categorising their experience as 'neutral' is an opportunity for providers to improve overall customer satisfaction with the complaints handling process.

When considering the qualitative research alongside our quantitative research through our trackers, we identified two areas where we expect providers to make improvements, in line with the rules we place on them through the general conditions, and the expectations we set out in our [Treating vulnerable customers fairly](#) guidance.

## Ease of making contact with providers to make a complaint

General Condition C4 requires communications providers to ensure that their complaints handling procedures are accessible to customers, including those who are disabled and those who are in circumstances that may make them vulnerable. Providers must allow customers to make a complaint in at least three ways: (a) a telephone number which is either a 'free to call' number or a number charged at the equivalent of a geographic call rate; (b) a UK postal address; and (c) either an email address or an internet web page form dedicated to allowing customers to lodge a complaint. These channels must be well publicised, easily accessible, and should not unduly deter customers from making a complaint.

Our qualitative research found, however, that in some cases participants felt that they were being directed towards online rather than phone contact (or vice versa) or that there was no choice at all. Having a choice of contact method is especially important for vulnerable customers, as highlighted in our 2020 guidance on [Treating vulnerable customers fairly](#); for example, customers who have experienced mental health problems often have serious difficulties using the telephone, so might prefer an alternative communication channel.

Our Reasons to Complain Tracker found that among those who had a reason to complain but did not go on to make one<sup>32</sup>, about one in ten said this was because they could not get through to their provider (12% for landline; 9% for mobile; 9% for fixed broadband)<sup>33</sup>, and some did not initiate a complaint because they did not know where to go/who to complain to (12% for landline; 13% for mobile; 6% for fixed broadband).<sup>34</sup>

Our qualitative research reinforces this, finding that while most participants said they found it easy to source contact details (via search engines or pre-stored contact details), some noted difficulty in finding the correct department. Some participants also cited being passed around call handlers and different departments which were not able to log their complaint.

Taken together, these findings indicate that a proportion of customers want to make a complaint but do not do so, due to difficulties in making contact with the provider. Ensuring that options are easily accessible, from the beginning of the process, would ensure that no customer who wishes to make a complaint encounters unnecessary barriers.<sup>35</sup>

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<sup>32</sup> Our Reason to Complain Tracker found that about three in four customers who had a reason to complain went on to make a complaint to their provider (71% for landline; 64% for mobile; 72% for broadband).

<sup>33</sup> Note: the base size for landline customers who did not go on to make the complaint was low (79) so this should be treated as an indicative finding.

<sup>34</sup> As above.

<sup>35</sup> Having a choice of contact method is especially important for vulnerable customers, as highlighted in our guide on treating vulnerable customers fairly.

## Supporting vulnerable customers through the complaints handling process

General Condition C5 aims to ensure that communications providers give sufficient consideration to the particular needs of people with disabilities, and people whose circumstances may make them vulnerable. It requires providers to have policies and procedures in place to make sure vulnerable customers are treated fairly.

There are indications across our research, however, that vulnerable customers are less satisfied with complaints handling.<sup>36</sup> Analysis of our Complaints Handling Tracker found that consumers who are vulnerable may be having a less satisfactory experience with their complaints process than those who are not vulnerable. Findings include that:

- landline (49% vs 57%), broadband (49% vs 57%) and mobile (51% vs 60%) complainants living with an impacting or limiting condition were less likely than those without such a condition to be satisfied with how their complaint was handled;
- those with an impacting or limiting condition were less likely than those without to have their complaint resolved on first contact, across landline (41% vs 48%), broadband (37% vs 42%) and mobile (40% vs. 50%); and
- the most financially vulnerable<sup>37</sup> were less likely to be satisfied with the complaints handling experience than either the potentially vulnerable or the least financially vulnerable customers. The most financially vulnerable were also more likely to be dissatisfied with their complaints handling experience in the landline and mobile sectors.

We also explored the experiences of vulnerable customers in our qualitative research. Some financially vulnerable customers described the complaints process as stressful, and emphasised the importance of fairness. Some respondents with an impacting or limiting condition highlighted how empathetic customer service representatives could help make the process easier.

Overall, we are concerned that vulnerable customers may have a worse experience than the average customer when complaining to their provider. As we set out in our [Treating vulnerable customers fairly](#) guide, providers should focus on making customer interactions positive for all their customers, especially vulnerable people. The guide gives good practice suggestions such as training customer service agents to deal with the needs of vulnerable customers in an empathetic way; by avoiding the need for vulnerable customers to have to explain their personal circumstances every time they make

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<sup>36</sup> For the purposes of our research, we refer to vulnerable customers as those who have an impacting or limiting condition and/or are financially vulnerable.

<sup>37</sup> Respondents providing sufficient personal data (household income and number of children in household) were grouped into three levels of financial vulnerability: most, potentially and least.

contact, which can be frustrating and/or distressing; and by allowing more time for a telephone call, to ensure a high-quality conversation.

## **Monitoring improvements on satisfaction with complaints handling**

As highlighted earlier in this section, we remain concerned that only half of the customers who contacted their provider with a complaint were satisfied with how the complaint was handled. We expect providers to review their procedures for ensuring that customers are treated fairly throughout the complaints handling process, in the light of the findings presented in this section, paying specific attention to the rules they are required to meet through the General Conditions. This should include reviewing their contact methods to ensure that customers have the option of at least three ways to contact the provider to make a complaint, and training customer service representatives so that they can resolve complaints efficiently.

Given our ongoing concern in this area, and as part of our regular stakeholder engagement, we will continue to challenge providers to assess and improve their complaints handling service. We will also monitor whether providers are treating customers in vulnerable circumstances fairly and giving them the support, and services, they need. This work will include looking at how providers ensure that customers in debt, or struggling to pay, are treated fairly.

# A1. Customer research source details<sup>38</sup>

## Mobile

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### Note A

**M2:** In terms of your mobile phone service, how satisfied are you with the overall service provided by (MOBILE PHONE SERVICE PROVIDER)?

**Base for 2021:** All adults aged 16+ who are the decision maker and express an opinion on their mobile phone service (2563), receiving their service from EE (476), giffgaff (156), O2 (403), Tesco Mobile (208), Three (234), Virgin Mobile (226), Vodafone (315), on a contract (2060), on pre-pay (489). 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.

**Base for 2022:** All adults aged 16+ who are the decision maker and express an opinion on their mobile phone service (2863), receiving their service from EE (510), giffgaff (290), O2 (406), Sky (177), Tesco Mobile (231), Three (222), Virgin Mobile (196), Vodafone (310), on a contract (2261), on prepay (585). 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.

### Note B

**M3:** And how satisfied are you with the overall value for money of your service from (MOBILE PHONE SERVICE PROVIDER)?

**Base for 2021:** All adults aged 16+ who are the decision maker and who express an opinion on their mobile phone service where it is held as a standalone service/ not taken with another service from the same provider (1999), receiving their service from EE (387), giffgaff (154), O2 (400), Tesco Mobile (206), Three (229), Vodafone (265), on a contract (1548), on pre-pay (441).

NB. Base size for Virgin Mobile (90) is low, so treat as indicative only.

**Base for 2022:** All adults aged 16+ who are the decision maker who express an opinion on their mobile phone service where it is held as a standalone service/ not taken with another service from the same provider (2195), receiving their service from EE (368), giffgaff (287), O2 (405), Tesco Mobile (231), Three (216), Vodafone (249), on a contract (1668), on pre-pay (516).

NB. Base size for Sky (46) is too low to report on. Base size for Virgin Mobile (74) is low, so treat as indicative only.

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<sup>38</sup> Base sizes for all questions can be found in the data tables: [Ofcom Customer Satisfaction Tracker 2022](#), [Ofcom Reason to Complain Tracker 2022](#) and [Ofcom Complaints Handling Tracker 2022](#)



## Note C

**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)?

**Base for 2021:** All adults aged 16+ who are the decision maker and express an opinion on their mobile phone service (2563), receiving their service from EE (476), giffgaff (156), O2 (403), Tesco Mobile (208), Three (234), Virgin Mobile (226), Vodafone (315), on a contract (2060), on pre-pay (489). 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.

**Base for 2022:** All adults aged 16+ who are the decision maker and express an opinion on their mobile phone service (2863), receiving their service from EE (510), giffgaff (290), O2 (406), Sky (177), Tesco Mobile (231), Three (222), Virgin Mobile (196), Vodafone (310), on a contract (2261), on pre-pay (585). 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.

## Note D

**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 for 2021:** All adults aged 16+ who are the decision maker and express an opinion on their mobile phone service (2563), receiving

their service from EE (476), giffgaff (156), O2 (403), Tesco Mobile (208), Three (234), Virgin Mobile (226), Vodafone (315), on a contract (2060), on prepay (489). Providers used by fewer than 100 respondents are not shown individually but are included in the total.

**Base for 2022:** All adults aged 16+ who are the decision maker and express an opinion on their mobile phone service (2863), receiving their service from EE (510), giffgaff (290), O2 (406), Sky (177), Tesco Mobile (231), Three (222), Virgin Mobile (196), Vodafone (310), on a contract (2261), on prepay (585). 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.

## Note E

**Q.5** Which, if any, of the following services or suppliers have given you a reason to complain in the last 12 months, whether or not you went on to make a complaint?

**Base for 2021:** All UK households 16+ with mobile: average mobile (6321), BT (251), EE (1208), giffgaff (378), O2 (1067), Tesco Mobile (574), Three (664), Virgin Mobile (470) and Vodafone (855).

**Base for 2022:** All UK households 16+ with mobile: average mobile (6286), BT (228), EE (1105), giffgaff (433), ID Mobile (126), O2 (1034), Sky (410), Tesco Mobile (557), Three (581), Virgin Mobile (409) and Vodafone (790).

## Note F

**Q9.** Overall, how satisfied are you with the service you received from [Provider] customer services with regard to the complaint that you had?

**Base for 2021:** All who complained about the mobile service in past six months (3205), EE (797), giffgaff (241), O2 (641), Tesco Mobile (339), Three (479), Virgin Mobile (206), Vodafone (502).

## Note G

**Q12:** You said that your complaint was completely resolved, was it completely resolved on your first contact with [Provider]?

**Base: for 2021:** All who complained about mobile service in past six months (3205), EE

**Base for 2022:** All who complained about the mobile service in past six months (3446), EE (762), giffgaff (238), O2 (684), Sky Mobile (141), Tesco Mobile (339), Three (502), Virgin Mobile (220), Vodafone (560).

(797), giffgaff (241), O2 (641), Tesco Mobile (339), Three (479), Virgin Media (206), Vodafone (502).

**Base for 2022:** All who complained about the mobile service in past six months (3446), EE (762), giffgaff (238), O2 (684), Sky Mobile (141), Tesco Mobile (339), Three (502), Virgin Mobile (220), Vodafone (560).

## Broadband

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### Note H

**IN2:** In terms of your fixed broadband service, how satisfied are you with the overall service provided by (FIXED BROADBAND SERVICE PROVIDER)?

**Base for 2021:** All adults aged 16+ who are the decision maker and express an opinion on their fixed broadband internet service (2261), receiving their service from BT (472), EE (142), Plusnet (143), Sky (428), TalkTalk (283), Virgin Media (525), Vodafone (102). 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.

**Base for 2022:** All adults aged 16+ who are the decision maker and express an opinion on their fixed broadband internet service (2585), receiving their service from BT (570), EE (219), Plusnet (263), Sky (400), TalkTalk (292), Virgin Media (475), Vodafone (145). 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.

### Note I

**IN4:** And how satisfied are you with the speed of service while online from (FIXED BROADBAND SERVICE PROVIDER)?

**Base for 2021:** All adults aged 16+ who are the decision maker and express an opinion on their fixed broadband internet service (2261), receiving their service from BT (472), EE (142), Plusnet (143), Sky (428), TalkTalk (283), Virgin Media (525), Vodafone (102). 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.

**Base for 2022:** All adults aged 16+ who are the decision maker and express an opinion on their fixed broadband internet service (2585), receiving their service from BT (570), EE (219), Plusnet (263), Sky (400), TalkTalk (292), Virgin Media (475), Vodafone (145). 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.

### Note J

**IN5:** And how satisfied are you with the reliability of your fixed broadband service from (FIXED BROADBAND SERVICE PROVIDER)?

**Base for 2021:** All adults aged 16+ who are the decision maker and express an opinion on their fixed broadband internet service (2261), receiving their service from BT (472), EE (142), Plusnet (143), Sky (428), TalkTalk (283), Virgin Media (525), Vodafone (102). 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.

**Base for 2022:** All adults aged 16+ who are the decision maker and express an opinion on their fixed broadband internet service (2585), receiving their service from BT (570), EE (219), Plusnet (263), Sky (400), TalkTalk (292), Virgin Media (475), Vodafone (145). 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.

## Note K

**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 for 2021:** All adults aged 16+ who are the decision maker and express an opinion on their fixed broadband internet service (2261), receiving their service from BT (472), EE (142), Plusnet (143), Sky (428), TalkTalk (283), Virgin Media (525), Vodafone (102). Providers used by fewer than 100 respondents are not shown individually but are included in the total.

**Base for 2022:** All adults aged 16+ who are the decision maker and express an opinion on their fixed broadband internet service (2585), receiving their service from BT (570), EE (219), Plusnet (263), Sky (400), TalkTalk (292), Virgin Media (475), Vodafone (145). 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.

## Note L

**Q.5** Which, if any, of the following services or suppliers have given you a reason to complain in the last 12 months, whether or not you went on to make a complaint?

**Base for 2021:** All UK households with fixed broadband 16+: average broadband (6169), BT (1345), EE (291), Plusnet (423), Sky (1232), TalkTalk (671), Virgin Media (1406) and Vodafone (289).

**Base for 2022:** All UK households with fixed broadband 16+: average broadband (6071), BT (1323), EE (275), NOW Broadband (122), Plusnet (431), Sky (1205), TalkTalk (644), Virgin Media (1302) and Vodafone (371).

## Note M

**Q9.** Overall, how satisfied are you with the service you received from [Provider] customer services with regard to the complaint that you had?

**Base for 2021:** All who complained about broadband service in past six months (3201), BT (634), EE (258), Plusnet (208), Sky (718), TalkTalk (506), Virgin Media (691), Vodafone (186).

**Base for 2022:** All who complained about broadband service in past six months (3363), BT (636), EE (276), Plusnet (200), Sky (758), TalkTalk (556), Virgin Media (753), Vodafone (184).

## Note N

**Q12:** You said that your complaint was completely resolved, was it completely resolved on your first contact with [Provider]?

**Base for 2021:** All who complained about broadband service in past six months (3201), BT (634), EE (258), Plusnet (208), Sky (718), TalkTalk (506), Virgin Media (691), Vodafone (186).

**Base for 2022:** All who complained about broadband service in past six months (3363), BT (636), EE (276), Plusnet (200), Sky (758), TalkTalk (556), Virgin Media (753), Vodafone (184).

## Landline

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### Note O

**L1:** In terms of your landline service, how satisfied are you with the overall service provided by (LANDLINE SERVICE PROVIDER)?

**Base for 2021:** All adults aged 16+ who are the decision maker and express an opinion on their landline service (1875), receiving their service from BT (465), EE (104), Plusnet (119), Sky (359), TalkTalk (256), Virgin Media (379). 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.

**Base for 2022:** All adults aged 16+ who are the decision maker and express an opinion on their landline service (2087), receiving their service from BT (533), EE (163), Plusnet (232), Sky (329), TalkTalk (239), Virgin Media (331), Vodafone (102). 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.

### Note P

**L3:** And how satisfied are you with the reliability of your landline service from (LANDLINE SERVICE PROVIDER)?

**Base for 2021:** All adults aged 16+ who are the decision maker and express an opinion on their landline service (1875), receiving their service from BT (465), EE (104), Plusnet (119), Sky (359), TalkTalk (256), Virgin Media (379). 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.

**Base for 2022:** All adults aged 16+ who are the decision maker and express an opinion on their landline service (2087), receiving their service from BT (533), EE (163), Plusnet (232), Sky (329), TalkTalk (239), Virgin Media (331), Vodafone (102). 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.

### Note Q

**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 for 2021:** All adults aged 16+ who are the decision maker and express an opinion on their landline service (1875), receiving their service from BT (465), EE (104), Plusnet (119), Sky (359), TalkTalk (256), Virgin Media (379). Providers used by fewer than 100 respondents are not shown individually but are included in the total.

**Base for 2022:** All adults aged 16+ who are the decision maker and express an opinion on their landline service (2087), receiving their service from BT (533), EE (163), Plusnet (232), Sky (329), TalkTalk (239), Virgin Media (331), Vodafone (102). 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.

## Note R

**Q.5** Which, if any, of the following services or suppliers have given you a reason to complain in the last 12 months, whether or not you went on to make a complaint?

**Base for 2021:** All UK households 16+ with a landline: average landline (5450), BT (1418), EE (237), Plusnet (385), Sky (1091), TalkTalk (606), Virgin Media (1084) and Vodafone (257).

**Base for 2022:** All UK households 16+ with a landline: average landline (5241), BT (1312), EE (229), NOW Broadband (104), Plusnet (379), Sky (1085), TalkTalk (577), Virgin Media (972) and Vodafone (329).

## Note S

**Q9.** Overall, how satisfied are you with the service you received from [Provider] customer services with regard to the complaint that you had?

**Base for 2021:** All who complained about landline service in past six months (2234), BT (556), EE (190), Sky (610), TalkTalk (343), Virgin Media (465).

NB. Base size for Plusnet (70) is low, so treat as indicative only.

**Base for 2022:** All who complained about landline service in past six months (2304), BT (583), EE (192), Sky (559), TalkTalk (325), Virgin Media (462), Vodafone (113).

NB. Base size for Plusnet (70) is low, so treat as indicative only.

## Note T

**Q12:** You said that your complaint was completely resolved, was it completely resolved on your first contact with [Provider]?

**Base for 2021:** All who complained about landline service in past six months (2234), BT (556), EE (190), Sky (610), TalkTalk (343), Virgin Media (465).

NB. Base size for Plusnet (70) is low, so treat as indicative only.

**Base for 2022:** All who complained about landline service in past six months (2304), BT (583), EE (192), Sky (559), TalkTalk (325), Virgin Media (462), Vodafone (113).

NB. Base size for Plusnet (70) is low, so treat as indicative only.