

A2. Consumer research sources

This annex sets out the scope and methodologies for the main sources of consumer research Ofcom has drawn on for our analysis in the Comparing Customer Service report.

Impact of Covid-19 on research methodology in 2020 and 2021

Prior to 2020, both the Reasons to Complain tracker (RTC) and Customer Satisfaction tracker (CST) collected data face to face in-home. In 2020, due to the Covid-19 pandemic, it was decided it was not possible to conduct research with an element of in-home interviewing. Therefore, Ofcom moved to an online methodology for both the RTC and CST. We kept this methodology for both trackers in 2021 and are therefore, able to again make year-on-year comparisons (albeit between the 2020 and 2021 waves alone).

While we can compare data drawn from the two most recent waves of Customer Satisfaction and Reasons to Complain market research trackers, the findings in both 2020 and in 2021 may have been affected by respondents' changing attitudes towards, expectations of, and propensities to complain about telecoms services, due to their increased reliance on them during the pandemic.

The Complaints Handling Tracker (CHT) remained online in both 2020 and 2021, as it has been since its inception in 2016. However, we made changes to the sampling methodology of the CHT in this wave (see Complaints Handling Tracker section below for full details) and therefore, this year we are unable to make year-on-year comparisons based on data drawn from this research.

We consider online to be a proportionate alternative to face-to-face research for these trackers, as it allows us to cost effectively achieve robust samples of low incidence groups (i.e. people who say that they have a reason to complain or who have complained about their service, as opposed to general customers, and customers of smaller communications providers closer to our 4% market share inclusion criteria). This approach means these data exclude standalone landline customers i.e. those who are not online (7%¹ of landline customers) and potentially under-represents lower internet users. It is also important to acknowledge any potential behavioural differences that a respondent might exhibit when completing a survey face to face versus completing a survey online. In particular, it is known that online panels can result in fewer responses in the top satisfaction/ agreement category.

Significance testing and error margin

Only providers with a stable residential market share of 4% or more are included in the analysis from these surveys. This share is based on market data from Q1 2021 for mobile and from Q2 2021 for both landline and broadband.

As outlined in the main report, there are a number of incidences where two (or more) providers

¹ [Ofcom's 2021 Technology Tracker CATI Survey](#)

have the same or a similar percentage to the sector average and/or other providers but are not noted as being statistically significant. This is due to a provider’s unweighted base sizes (i.e. the number of interviews conducted) reflecting its share of the relevant market. Base sizes between the communications providers included in the three trackers in 2021, and across markets considered, varied from 1418 customers for the provider with the largest market share to 70 with the smallest (over the threshold of 4% market share).

The reason for the varying levels of statistical significance is that the size of the sample impacts the level of confidence we can have in the data. A lower base size means there is a wider confidence interval and where two intervals overlap the difference is not considered significant. Where there is a larger sample of interviews, we can be more confident that the behaviour displayed, more accurately represents the likely behaviour of the populations we are looking to understand, as the confidence intervals are much smaller.

The table below (drawn from the [Ofcom Reason to Complain Tracker 2020](#)) illustrates the difference the base size can have on the lower and upper confidence interval around a particular result.

In this example, BT Mobile (7%) appears to have the same percentage of customers who had a reason to complain about their provider as each of O2 and Tesco Mobile. However, unlike O2 and Tesco Mobile, BT Mobile is not showing as statistically significantly different from the total market average at a 95% level of confidence. This is due to the fact that BT Mobile has a lower base size (221) compared to Tesco Mobile (572) and O2 (1121). The lower base size of BT Mobile means that it has a wider confidence interval than that of the other providers e.g. BT Mobile has a range between 3% and 10% compared to O2 which has a range between 6% and 9%.

Figure 1: Proportion of BT Mobile, O2 and Tesco Mobile customers with a reason to complain in 2020

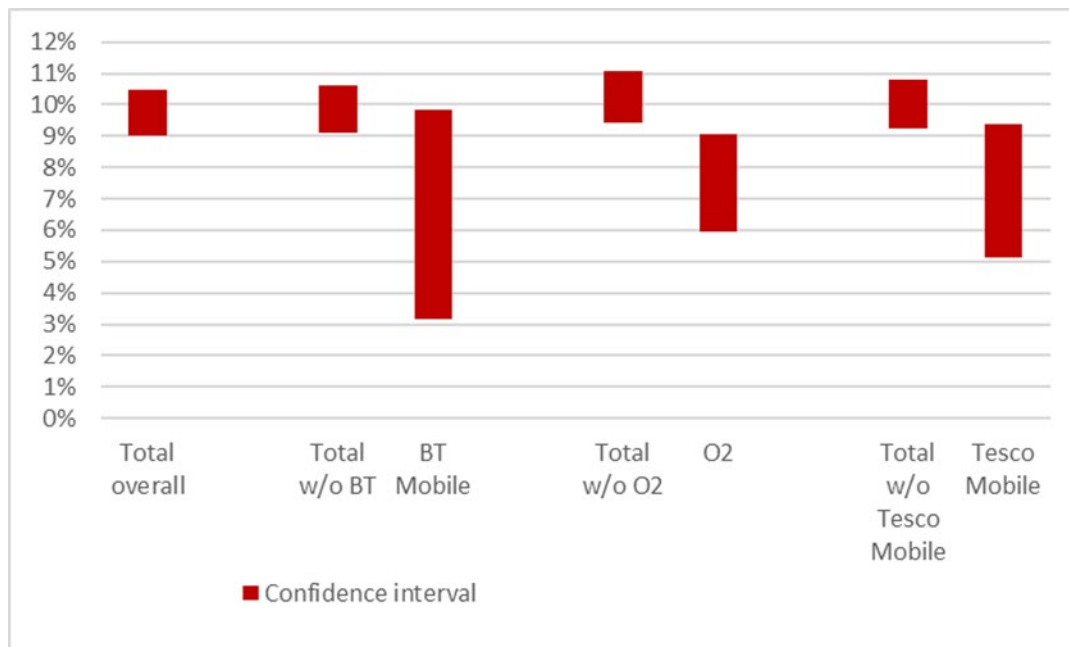
	Base	Mean	Upper	Lower	Confidence Interval (+/-)
Total	6246	10%	10%	9%	<1%
BT Mobile	221	7%	10%	3%	3%
O2	1121	7%	9%	6%	2%
Tesco Mobile	572	7%	9%	5%	2%

XX Statistically significantly better than the sector average at the 95% confidence level for market research results / top performer for other data.

Significance testing on the customer satisfaction and reasons to complain research data research data included in this report (for in-year comparisons) is run by provider against the total market average, excluding that provider. As shown in the chart below (which again, draws upon Reasons to Complain 2020), larger providers such as O2 and Tesco Mobile have a proportionally larger impact on the market average than smaller providers, such as BT Mobile. Removing O2 from the average impacts the total more than removing BT Mobile. A significant result is indicated where there is no overlap between the provider result and the market average (excluding the result of that provider)

when taking into account the respective error margins, therefore the result is significant for both O2 and Tesco Mobile at 95% significance.

Figure 2: Confidence intervals (at 95% significance) among BT Mobile, O2 and Tesco Mobile customers with a reason to complain in 2020



Q5. Which if any of the following services or suppliers have given you a reason to complain in the last 12 months? By mobile supplier

Unweighted base: BT Mobile (221), O2 (1,121), Tesco Mobile (572)

Comparing customer service research 2021: Complaints Handling

Since 2016, Ofcom has monitored levels of customer satisfaction with complaints handling. The core aim of this study is to monitor satisfaction with customer service during complaints handling among customers who have made a complaint(s) to their provider in the six months prior to fieldwork.

The research was conducted online among a representative sample of 6,052 UK adults, aged 16+. Fieldwork took place between 5 November 2021 and 6 January 2022. As such, the last six months covers the period between mid-May and early-January 2022, (depending on when the interviews took place).

This research includes UK communications providers with a market share of 4% or more (as at Q1 2021 for mobile and as at Q2, 2021 for landline and broadband).

The data is presented at both a total sector level and at a provider level. Total sector level data is weighted to be representative of the UK as a whole, and provider level data is unweighted.

Significance testing has been applied at the 95% confidence level in year. As noted below, no year-on-year comparisons were made.

In the [Comparing customer service: mobile, home broadband and landline report](#), when we use the term “average” we are referring to the average of the providers included in the study (see report for providers included).

Data tables can be found at: [Total level data tables](#); and [Provider level data tables](#).

Complaints handling tracker sample design

As outlined in the Complaints Handling tracker’s [technical report](#), the research is conducted using an online panel and river sampling approach as we consider it to be the most cost-effective and efficient means to reach the low incidence audiences (customers who have made a complaint about their communications provider).

The CHT has evolved and in 2019 questions were added that allowed us to identify respondents who have an impacting/ limiting condition and/ or are financially vulnerable.

On analysing data from 2019 and 2020, Ofcom identified a higher-than-expected proportion of respondents with at least one impacting/ limiting condition and a lower than expected proportion of respondents aged 55 and over in the sample who complete the complaints handling survey.

We explored this in detail and as a result changed our approach to sampling in the 2021 wave by opening the survey up to over 55s in the first two weeks of fieldwork and adjusting the proportion of the sample derived from river versus panel sample sources from 35:65 to 50:50, again in order to increase the opportunity for over 55s to participate. After which, we reverted to the previous approach of inviting a sample demographically representative of the UK adult population to take part in the research in order to achieve the sample targets. From here, respondents were screened as having made a complaint to a relevant provider within the six months prior to fieldwork.

In the absence of robust profiling data for this low incidence audience, we viewed this approach to be the best method to ensure that the resulting sample was as representative of the sample target as possible in the circumstances.

The changes to the sampling approach mean the 2021 sample is no longer comparable with previous waves as any year-on-year differences could be a consequence of the change to the sampling approach, rather than actual trends in the results; therefore, we are not reporting wave on wave changes this year.

Figure 3: Sample sizes by sector – 2021

Provider	Sample sizes by sector 2021			
	Landline	Fixed broadband	Mobile	Pay TV
BT	556	634		350
EE	190	258	797	
giffgaff			241	

O2			641	
Plusnet	70	208		
Sky	610	718		732
TalkTalk	343	506		337
Tesco Mobile			339	
Three			479	
Virgin Media	465	691	206	515
Vodafone		186	502	

Comparing customer service Research 2021: Reason to Complain

Since 2009, Ofcom has been tracking the proportion of customers using a landline, broadband and mobile service who say they have had reason to complain about their provider in the previous 12 months.

In 2021, we continued to use the online methodology for the RTC that we first adopted in 2020 in response to Covid-19 lockdown measures.

The research was conducted via an online omnibus among a nationally representative sample of 6,442 adults aged 16+. The fieldwork took place between 24 and 30 of November 2021. As such, the last 12 months refers to the 12 months prior to fieldwork (November 2020 – November 2021). Given that the methodology was unchanged in this wave, we are able to compare the 2020 and 2021 data.

The specific objectives of the RTC are to explore whether consumers have had a reason to complain about their landline, broadband, mobile and/or pay TV provider in the last 12 months, and if so, to ascertain the reason for the complaint. In addition, to explore whether customers with a reason to complain went on to make a complaint; and, if they did, to which organisation they complained, or if they did not go on to make a complaint, why not. And, where sample size allows, to split information within each sector by communications provider.

Significance testing has been applied at the 95% confidence level in year and at the 99% confidence level for year-on-year comparisons.

The data are weighted to the national UK profile using target rim weights for gender, age, social class and region.

More information about the methodology and weighting can be found in the: [RTC Technical Note](#)

In the report, when we use the term “average” we are referring to the average of all providers in the relevant sector.

Data tables can be found at: [Reason to Complain Data tables](#).

Customer Satisfaction Tracker 2021

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

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

Between 2010 and 2016 customer satisfaction levels across these communications markets were monitored via questions on Ofcom's annual Switching Tracker (face to face methodology). In 2018, we moved the questions to a bespoke tracking study, the CST, and between 2018 and January/February 2020 the data was collected through a face-to-face study followed by a smaller online study.

In 2021, we continued to use the online methodology for the CST that we first adopted in 2020 in response to Covid-19 lockdown measures. The research was conducted via a bespoke online panel among a nationally representative sample of 2,687 UK adults, aged 16+². Fieldwork took place between the 29 November and 14 December 2021. Given that the methodology was unchanged in this wave, we are able to compare the 2020 and 2021 data.

Significance testing was applied at the 95% confidence level in year and at the 99% confidence level for year-on-year comparisons. More information about the methodology and weighting can be found in the [CST Technical Note](#).

In the Comparing customer service: mobile, broadband and landline report, when we use the term "average" in relation to levels of customer satisfaction with the service provided we are referring to the average of all providers in the relevant sector.

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

Data tables can be found at: [Customer Satisfaction Tracker data tables](#).

² This included 128 'boost' interviews designed to ensure a more robust sample (of at least 100 where possible) among customers of communication providers with a relatively low share of a given market.