making communications work
for everyone

Comparing customer service: mobile, home broadband and landline

Fairness for customers

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Overview

This is Ofcom’s fifth annual report on how service levels 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.

By shining a light on the performance of the UK’s main mobile, broadband and home phone providers, this report allows people to look beyond the price and see what level of service they can expect from different providers. It also acts as an incentive for providers to improve their customer service.

This report covers customers’ experiences in 2020 and therefore includes the period covered by the coronavirus (Covid-19) pandemic. It has been a challenging year, and some customers experienced lower levels of service quality at times. This can be explained by the unique situation, but in cases where service levels worsened, we expect them to return to at least 2019 levels, or better, now that processes are established for operating in the pandemic, and as restrictions ease.

What we have found

The Covid-19 pandemic has made telecoms services more important than ever to many people. Broadband and mobile were considered to be the most important communications services, and about half of broadband customers and four in ten mobile customers said these services had become more important to their household because of the pandemic.

Mobile customers were the most likely to be satisfied with the service from their provider, with nine in ten saying they were satisfied (90%). Eighty per cent of broadband customers and 77% of landline customers said they were satisfied with their service. Three’s customers had lower than average satisfaction for mobile, and Virgin Media customers had lower than average satisfaction for landline.

Seventeen per cent of broadband and 12% of mobile customers said they were more willing to complain about their service because of the pandemic, while 6% of customers in each market said they were less willing to complain. Customer satisfaction with complaint handling has remained just above 50%, leaving room for improvement from providers.

The pandemic significantly reduced many providers’ call centre capacity, and customers had to wait longer on average to speak to an advisor than they did in 2019. Mobile customers who called their provider about their service spent 2 minutes 7 seconds on average in a queue (up by 49 seconds), while broadband and landline customers spent 4 minutes 9 seconds on average in a queue (up by 1 minute 59 seconds).

Faults resulting in total loss of service were resolved within two days on average in 2020, with nine in ten (89%) total loss of service faults solved within a week. Eighty-five per cent of landline and broadband orders were delivered by the agreed date, although there were notable variations between providers; BT completed the lowest percentage of orders on the date agreed (75%). Among the providers included in both this year's and last year's report, the number of orders completed was 12% lower in 2020 than in 2019.

Automatic compensation payments were temporarily halted due to the pandemic. In March 2020, Ofcom explained its view that, given the restrictions on travel and access to properties, it would temporarily be legitimate for providers not to pay automatic compensation. By July 2020, all providers signed up to the scheme had restarted paying automatic compensation for some service issues, although there are still circumstances in which it remains legitimate for providers not to pay automatic compensation because of Covid-19, for example if an engineer cannot visit a customer's home because the customer is self-isolating. Providers paid over £27.5m in automatic compensation in 2020.

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.

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Impact of Covid-19 on customer service

The Covid-19 pandemic and lockdown measures presented challenges for telecoms providers, while also making telecoms services more important than ever for some customers. The data included in this report on repair and provision times, missed appointments, call waiting times, and compensation spans the whole of 2020, while our market research was conducted in November and December 2020.[1] Our data and research relate to residential customers only, and do not include businesses.

Our findings show that the Covid-19 pandemic had a particularly significant impact on providers' call centres and call waiting times. The pandemic and associated restrictions meant that providers faced reduced call centre capacity, particularly in the early months of the pandemic, and this resulted in higher call waiting times for many customers. Many providers had to make system changes or send equipment to staff to allow them to work remotely, while providers with offshore call centres faced added logistical challenges due to the diverse nature of local restrictions in other countries. Some providers encouraged customers to use alternative contact channels, such as webchat, in order to try to reduce call volumes. While we recognise this has been a challenging year for providers, the industry has now had a significant amount of time to put in place adequate measures to mitigate many of the issues they have faced since the pandemic began. We therefore expect performance to return to 2019 levels, or better, as UK-wide restrictions continue to ease during 2021.

For our market research findings, we are unable to make year-on-year comparisons using our Customer Satisfaction and Reasons to Complain market research trackers, as our research methodology changed: these surveys were undertaken online in 2020 due to Covid-19 lockdown measures (instead of face to face, as previously). The online methodology of the Complaints Handling tracker was unchanged and therefore we can make year-on-year comparisons based on data drawn from this research. However, the results in 2020 may still 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.

[1] Our Complaint Handling tracker asked customers about their experience over the past six months; the Reasons to Complain tracker asked about experience over the past 12 months; the Customer Satisfaction tracker focuses on customers' current satisfaction with their provider.

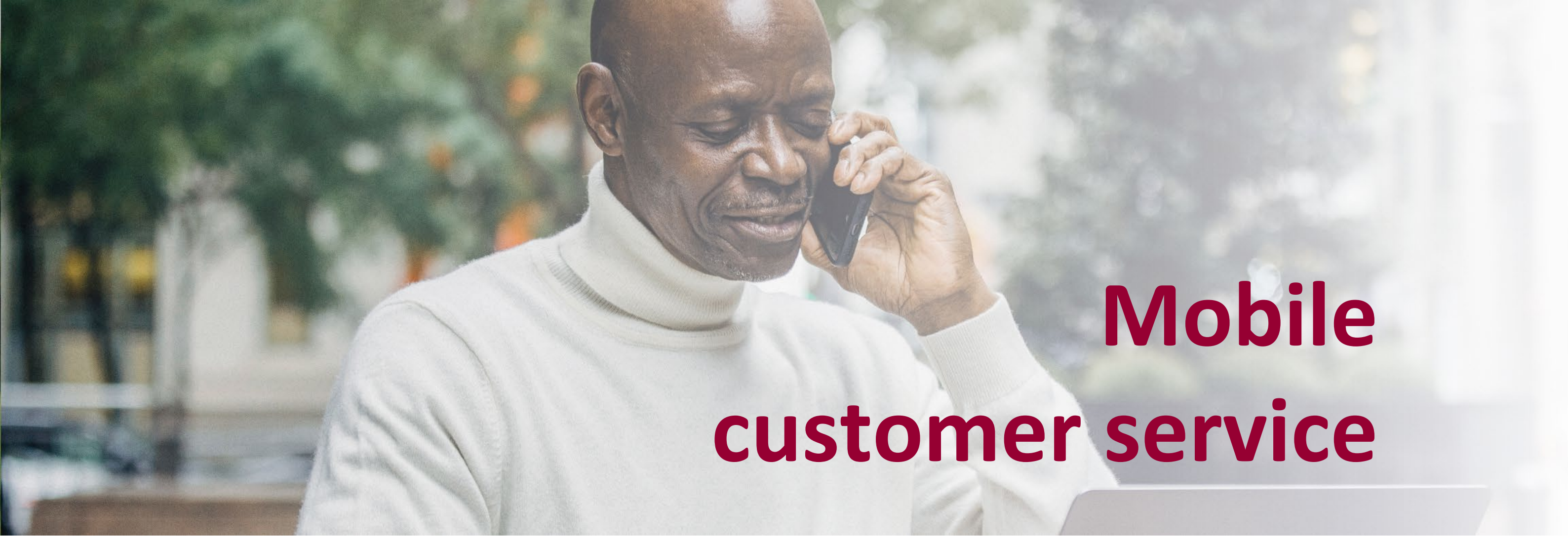
To help us understand whether there have been any direct effects of the pandemic on customers' responses in the research, we asked respondents three additional questions:

1) how important each communications service was to them at that point in time;
2) if a service was more or less important to them because of the pandemic; and
3) whether they were more or less willing to make a complaint because of the pandemic.

Our research shows that broadband and mobile were considered the most important communication services to people, compared to landline.[2] We also found that about half of broadband customers and four in ten mobile customers said these services were more important to their household because of the pandemic.

Responses were mixed in terms of customers’ willingness to complain during the pandemic. Seventeen per cent of broadband customers and 12% of mobile customers said they were more willing to make a complaint as a result of the pandemic, perhaps as a result of the increased importance of these services. However, a minority (6%) of these customers said they were less willing to make a complaint as a result of the pandemic.

[2] See also Affordability of communications services initial findings.



Mobile customer service

	Average mobile	BT	EE	giffgaff	iD mobile	O2	Sky	Tesco mobile	Three	Virgin Media	Vodafone
Satisfaction with service overall	90%	N/A	92%	93%	N/A	91%	N/A	91%	86%	88%	90%
Satisfaction with value for money	83%	N/A	80%	95%	N/A	79%	N/A	90%	88%	84%*	77%
Customers with a reason to complain	10%	7%	9%	5%	5%	7%	5%	7%	13%	13%	16%
Overall satisfaction with complaint handling	57%	N/A	56%	57%	N/A	62%	N/A	55%	56%	56%	55%
Complaints to Ofcom per 100,000 subscribers	13↓	16↓	6↓	N/A	15↑	8↓	6↓	3	23↑	25↓	20↓
Average call waiting times (mm:ss)	2:07↑	0:46↑	2:09↑	N/A	0:56↓	2:17↑	2:33↑	3:39↑	1:03↓	6:44↑	1:56↑

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

XX *Statistically significantly worse than the sector average at the 95% confidence level for market research results / bottom performers for other data.*

↑ *indicates where a provider's score has increased since 2019.*

↓ *indicates where a provider's score has decreased since 2019.*

** Satisfaction with value for money: Virgin Mobile had a low base size (88) and associated 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. For example, this applies to BT and iD Mobile's reason to complain scores. These providers' scores have a wider margin of error when compared to O2, Tesco Mobile and Sky. Hence the results for BT and iD Mobile, while the same as those reported by these other providers, are not marked as significantly different to the average.
Results are marked 'N/A' where market share is below 4%, 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.

Customer satisfaction

- **Nine in ten mobile customers were satisfied with their service overall**. Satisfaction was lower among Three's customers compared to the market average (86% vs. 90%), while satisfaction levels were in line with the average for all other providers.
- **Three per cent of mobile customers said that they were dissatisfied with their service overall**. As in previous years, poor reception or coverage was a key driver of dissatisfaction. Just over half of dissatisfied mobile customers (51%) said that the main reason for their dissatisfaction was poor reception or coverage in an unspecified location, while three-quarters cited poor reception in any location (unspecified, at home, or 'in my area') as a reason for their dissatisfaction.
- **Giffgaff customers were more likely than average to be satisfied with their mobile reception or signal strength**, compared to the average (90% vs. 82%),[3] while Three's customers were less likely to be satisfied (69% vs. 82%).
- **Views on value for money among mobile customers were mixed:** giffgaff, Tesco Mobile and Three customers were more likely than average to be satisfied with value for money, and O2 and Vodafone customers were less likely to be so.
- **Giffgaff and Tesco Mobile customers were more likely than average to recommend their provider to a friend**, while Three and Virgin Mobile customers were less likely than average to do so. The scores of all the other providers were in line with the sector average.[4]

Figure 1: Recommend to a friend: mobile providers

	2021
More likely to recommend	giffgaff, TESCO mobile
Mobile average	EE, O2, vodafone
Less likely to recommend	3, Virgin media

Source: Ofcom Customer Satisfaction Tracker, November / December 2020.

[3] Giffgaff does not have its own network infrastructure and uses O2's network.
4 The average 'recommend to a friend' score in the mobile market was 21. EE (17), giffgaff (50), O2 (23), Tesco Mobile (42), Three (6), Virgin Mobile (6) and Vodafone (16) all have scores that are between 0 and 50 and therefore considered 'good' based on global NPSTM standards. See interactive report for further details.

Complaints and complaints handling

- **One in ten mobile customers said they had reason to complain about their mobile service or supplier in 2020.** Giffgaff, O2, Tesco Mobile and Sky customers were significantly less likely than the market average to have reason to complain. Vodafone, Three and Virgin Mobile customers were significantly more likely to have a reason to complain, compared to the market average.[5]
- **Where mobile customers had reason to complain, the most common reason was that their service was not performing as it should** (50%); for example, because of poor connection quality or loss of service. This was followed by a billing, pricing or payment issue (39%), then dissatisfaction with customer service (21%). These were the same reasons as in 2019.
- **Nearly six in ten (57%) mobile customers who made a complaint to their provider in 2020 were satisfied with the way their complaint was handled.** This is in line with the 2019 findings.
- **O2 customers were more likely than the market average to be satisfied with the way in which their complaint was handled**. Satisfaction levels were in line with the average for all other providers.
- **As in 2019, nearly half of mobile complaints were completely resolved on first contact**. EE was more likely than the mobile average to have resolved a complaint completely on first contact, while Virgin Media was less likely than the market average to have done so.

Figure 2: Handling of mobile complaints

	Average mobile	EE	giffgaff	O2	Tesco mobile	Three	Virgin media	vodafone
Overall satisfaction with complaints handling	57%	56%	57%	62%	55%	56%	56%	55%
Complaints completely resolved on first contact	46%	50%	46%	47%	42%	42%	36%	44%

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XX *Statistically significantly worse than the sector average at the 95% confidence level for market research results / bottom performers for other data.*

Source: Ofcom Complaints Handling Tracker 2020 (see Note F in Annex 1 for more information).

[5] Ofcom Reason to Complain Tracker 2020.

Complaints to Ofcom

For the fourth consecutive year, Tesco Mobile generated the fewest complaints to Ofcom per 100,000 subscribers during 2020. Virgin Mobile generated the most complaints per 100,000 subscribers. The average number of complaints received a year per 100,000 subscribers fell slightly, from 14 in 2019 to 13.

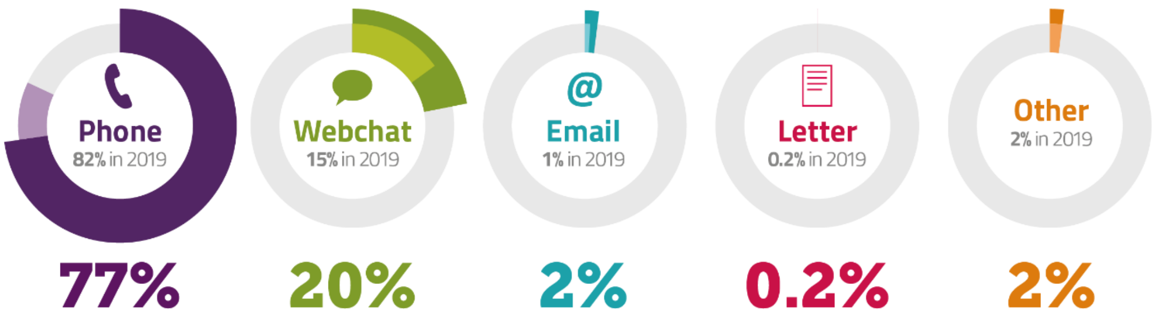
Figure 3: Pay-monthly mobile complaints per 100,000 subscribers: 2020

Source: Ofcom, 2020. 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 EE and Sky Mobile's pay-monthly complaints per 100,000 subscribers is less than one, so their results should be considered comparable.

Customer contacts

As in 2019, telephone remained the most popular way for mobile customers to contact their provider, accounting for 77% of contacts during the year. This is down since 2019, when 82% of contacts were via phone calls. Webchat was the next most popular at 20%, up from 15% in 2019. As explained above, the pandemic significantly affected many providers' call centre capacity. Some providers reallocated staff and encouraged customers to use alternative contact channels, such as webchat, to try to reduce call volumes and manage call centre capacity.

Figure 4: Customer contacts with mobile providers, by channel



Source: Ofcom / provider data, 2020.

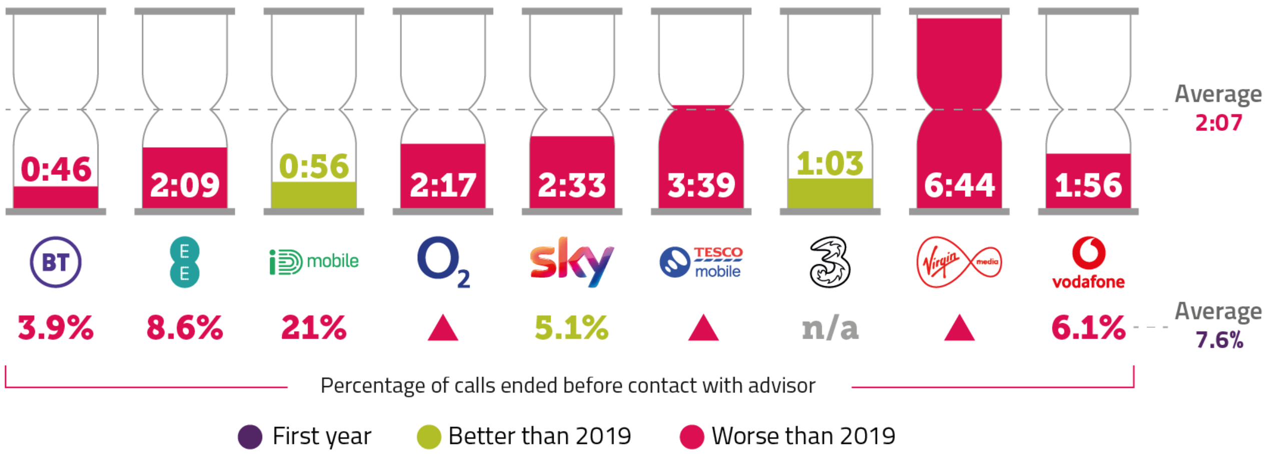
Call waiting time and abandonment rate

- **The average call waiting time for mobile customers increased significantly**, from 1 minute 18 seconds in 2019 to 2 minutes 7 seconds in 2020. Providers responded in different ways to the impact of the pandemic on their call centre capacity. As mentioned above, some promoted the use of other methods of contact, such as webchat, while others advised customers against contacting them via phone. As such, comparisons between average call waiting times should be treated with caution, as they only reflect the experience of customers who were able to contact their provider by phone.
- **Most mobile providers' average call waiting times increased in 2020.** Three and iD Mobile were the only mobile providers to reduce their average call waiting time. However, these providers also took steps to encourage customers to use other methods of contact, and they reported the largest reduction in the volume of customer contacts by phone during the early months of the pandemic.[6]
- **BT Mobile remained the provider with the shortest average call waiting time, at 46 seconds**. This was 12 seconds longer than its average call waiting time in 2019.
- **Virgin Mobile was the mobile provider with the longest average call waiting time**. Virgin Mobile's average call waiting time increased from 4 minutes 43 seconds in 2019 to 6 minutes 44 seconds in 2020.

[6] Three and iD Mobile told us that the pandemic and lockdown restrictions impacted their call centre capacity. In response, both these providers told us that they increased their webchat capacity.

- **In 2020, 7.6% of calls were abandoned before the customer spoke to a customer service agent**.[7] Of the providers which submitted comparable data, BT had the lowest abandonment rate for the second year in a row. Among those whose data were not comparable, O2, Tesco Mobile, and Virgin Mobile's abandonment rate had worsened since the previous year.[8]

Figure 5: Average call waiting times, by provider: 2020



Source: Ofcom / provider data, 2020.[9]

[7] The industry average call abandonment rate for 2020 is not directly comparable to 2019 as it does not include data for Three.
[8] Information about Three's performance compared to the previous year has not been included, as Three was unable to provide data to compare to its 2019 performance.
[9] O2, Tesco Mobile, and Virgin Mobile were unable to provide comparable data about the percentage of calls ended, so only information about their performance compared to the previous year has been included. Information about Three's performance compared to the previous year has not been included, as Three was unable to provide data to compare to its 2019 performance. Giffgaff does not have a call centre and therefore is not included. Lycamobile was excluded as it was unable to provide comparable data on either metric. See Annex 3 for methodology.

Broadband customer service

	Average broadband	BT	EE	KCOM	Plusnet	Post Office[10]	Sky	TalkTalk	Virgin Media	Vodafone
Satisfaction with service overall	80%	80%	82%	N/A	81%	N/A	80%	77%	80%	N/A
Satisfaction with speed of service	79%	80%	78%	N/A	75%	N/A	80%	71%	82%	N/A
Customers with a reason to complain	26%	23%	30%	N/A	24%	N/A	24%	24%	29%	32%
Overall satisfaction with complaint handling	52%	55%	47%	N/A	47%	N/A	59%	47%	48%	N/A
Ofcom complaints per 100,000 subscribers	50↓	50↓	20↓	N/A	69↓	61↑	23↑	81↓	69↑	103↓
Average call waiting time (mm:ss)	4:09↑	3:28↑	1:15↑	3:19↑	4:52↑	1:59↑	3:21↑	1:46↑	7:40↑	3:25↑

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↑ *indicates where a provider's score has increased since 2019.*

↓ *indicates where a provider's score has decreased since 2019.*

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 EE and Plusnet's satisfaction with complaint handling. These providers' scores have a wider margin of error when compared to TalkTalk. Hence the results for EE and Plusnet, while the same as TalkTalk, are not marked as significantly different to the average. Results are marked 'N/A' where market share is below 4%, 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.

[10] In March 2021 Post Office completed the sale of its broadband and landline services to Shell Energy and exited the telecoms market.

Customer satisfaction

- **Eight in ten broadband customers reported that they were satisfied with their service overall.** Overall satisfaction levels were broadly similar across all providers.
- **TalkTalk customers were less satisfied with the speed of their service** compared to the market average. Satisfaction with speed of broadband service was in line with the average across all other providers.
- **Nearly four in five broadband customers were satisfied with the reliability of their service** and there were no differences by provider on this measure.
- **EE customers were more likely than average to recommend** their broadband provider to a friend, while the scores of all the other broadband providers were in line with the sector average.[11]

Figure 6: Recommend to a friend: broadband providers

	2021
More likely to recommend	EE
Mobile average	BT, plusnet, sky, TalkTalk For Everyone, Virgin media
Less likely to recommend	N/A

Source: Ofcom Customer Satisfaction Tracker November / December 2020.

Complaints and complaints handling

- **A quarter (26%) of broadband customers had a reason to complain about their service in 2020.** BT broadband customers were significantly less likely than the market average to have a reason to complain, while Virgin Media and Vodafone customers where significantly more likely than average to have a reason to complain.[12]
- **As in 2019, the most common reason for customers to complain about their fixed broadband was a service issue** (76%), such as slow broadband speeds or an intermittent or total loss of service. This was followed by a billing, pricing or payment issue (18%) and dissatisfaction with customer service (12%).
- **About half (52%) of broadband customers who made a complaint to their provider in 2020 were satisfied with the way their complaint was handled.** This is in line with our 2019 findings. Sky performed better than the sector average, while TalkTalk and Virgin Media were below the average. EE had a significant decline in satisfaction compared to 2019 (47% vs. 66%).

[11] The average 'recommend to a friend' score in the broadband market was 3. BT (4), EE (11) Plusnet (1), Sky (5), TalkTalk (1) and Virgin Media (1) have 'recommend to a friend' scores that are between 0 and 50 and therefore considered 'good' based on global NPS standards.

[12] Ofcom Reason to Complain Tracker, 2020.

- **Nearly two in five (37%) broadband complaints were completely resolved on first contact**, unchanged since 2019. Sky was more likely than the broadband sector average to have resolved a complaint completely on first contact, while Plusnet and TalkTalk were less likely than the market average to have done so.

Figure 7: Handling of broadband complaints

	Average broadband	BT	EE	plusnet	sky	TalkTalk For Everyone	Virgin
Overall satisfaction with complaints handling	52%	55%	47%	47%	59%	47%	48%
Complaints completely resolved on first contact	37%	40%	34%	30%	42%	31%	34%

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

Source: Ofcom Complaints Handling Tracker 2020 (see Note F in Annex 1 for more information).

Complaints to Ofcom

EE generated the fewest broadband complaints to Ofcom per 100,000 subscribers, while Vodafone generated the most for the second year in a row. Among the major broadband providers, the average number of broadband complaints per 100,000 subscribers fell from 52 in 2019 to 50 in 2020.

Figure 8: Broadband complaints per 100,000 subscribers: 2020

Fixed broadband:
Complaints per 100,000

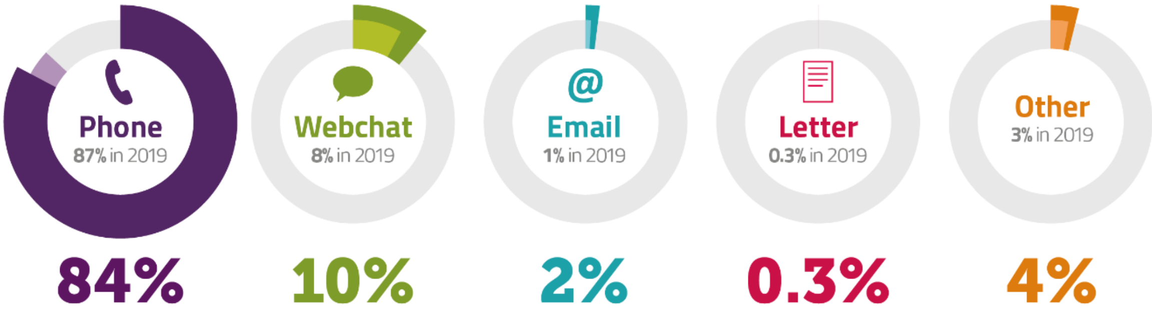
Fewest complaints	2020	Year-on-year change
EE	20	-2
sky	23	1
BT	50	-1
Industry average	50	-2
Post Office	61	24
Virgin	69	9
plusnet	69	-31
TalkTalk For Everyone	81	-6
vodafone	103	-12
Most complaints		

Source: Ofcom, 2020. 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 Plusnet and Virgin Media, and the industry average and BT broadband complaints per 100,000 subscribers is less than one, so their results should be considered comparable.

Customer contacts

As with mobile customers, telephone was again the most popular method of contact for landline and broadband customers in 2020, accounting for an average of 84% of customer contacts, compared to 87% in 2019. This was followed by webchat at 10% (up from 8% in 2019). As explained above, the pandemic significantly reduced many providers' call centre capacity, and some providers took steps to encourage customers to use alternative contact channels, such as webchat, in order to try and reduce call volumes.

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



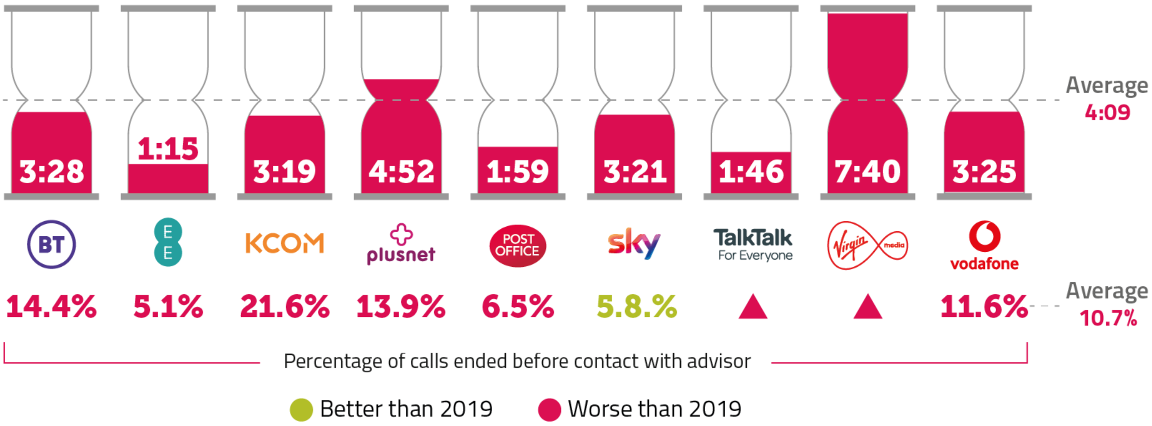
Source: Ofcom / provider data, 2020.

Call waiting time and abandonment rate

- **All broadband and landline providers' average call waiting times increased in 2020.** The industry average call waiting time increased from 2 minutes 10 seconds in 2019 to 4 minutes 9 seconds. As with mobile, broadband and landline providers responded in different ways to the impact of the pandemic on their call centre capacity, and some providers discouraged customers from contacting them by phone.[13] As such, comparisons between average call waiting times should be treated with caution, as they only reflect the experience of customers who were able to contact their provider by phone.
- **Virgin Media customers endured the longest call waiting times.** Virgin Media's average call waiting times increased from 1 minute 35 seconds in 2019 to 7 minutes 40 seconds in 2020. EE had the shortest average call waiting time (1 minute 15 seconds).
- **Almost double the proportion of calls to landline and broadband providers were ended while the customer was waiting in a queue.** In 2020 10.7% of calls were abandoned before the customer spoke to a customer service agent, up from 5.4% in 2019. Of the providers which submitted comparable data, EE had the lowest rate of call abandonment for the second year in a row. Of those which did not submit comparable data, TalkTalk and Virgin Media's abandonment rate had worsened since the previous year.

[13] TalkTalk reported a significant fall in its volume of customer contacts by telephone as it had to temporarily reduce capacity in its overseas call centres in April/May 2020 while improving customer access to webchat and other online self-service tools. Although TalkTalk sought to restore call centre capacity, it restricted calls to the call centres, other than for vulnerable customers, throughout 2020.

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



Source: Ofcom / provider data, 2020. Some providers were not able to provide comparable data.[14]

[14] TalkTalk and Virgin Media were unable to provide comparable data about the percentage of calls that ended, so only information about their performance compared to the previous year has been included. See Annex 3 for methodology.

Landline customer service

	Average landline	BT	EE	KCOM	Plusnet	Post Office	Sky	TalkTalk	Virgin Media	Vodafone
Satisfaction with service overall	77%	78%	81%	N/A	78%	N/A	79%	82%	69%	N/A
Customers with a reason to complain	7%	9%	8%	N/A	5%	N/A	6%	7%	7%	9%
Overall satisfaction with complaint handling	53%	56%	48%	N/A	48%*	N/A	54%	50%	50%	N/A
Ofcom complaints per 100,000 subscribers	35↓	29↓	12↓	N/A	48↓	41↑	16↓	59↓	45↓	55↓
Average call waiting time (mm:ss)[15]	4:09↑	3:28↑	1:15↑	3:19↑	4:52↑	1:59↑	3:21↑	1:46↑	7:40↑	3:25↑

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↑ *indicates where a provider's score has increased since 2019.*

↓ *indicates where a provider's score has decreased since 2019.*

**Satisfaction with complaints handling: Plusnet had a low base size (89).*

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 landline sector this applies to Vodafone's reason to complain score, as this provider has a wider margin of error when compared to BT. Hence the results for Vodafone, while the same as BT, are not marked as significantly different to the average. Results are marked "N/A" where market share is below 4%, 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.

[15] Call waiting times are calculated for landline and broadband service together. Please see previous section for further details on landline providers' average call waiting time and call abandonment rates.

Customer satisfaction

- **Overall satisfaction with landline was lower among Virgin Media's customers**, compared to the average (69% vs. 77%).
- **Four in five landline customers (82%) were satisfied with the reliability of their service**, and levels of satisfaction were in line with this across all providers in this sector.
- **EE and Sky customers were more likely than average to recommend their landline provider** to a friend, while Virgin Media's customers were less likely than average to do so.[16]

Figure 11: Recommend to a friend: landline providers

	2021
More likely to recommend	EE, sky
Mobile average	BT, plusnet, TalkTalk For Everyone
Less likely to recommend	Virgin media

Source: Ofcom Customer Satisfaction Tracker November / December 2020.

Complaints and complaints handling

- **Seven per cent of landline customers had a reason to complain in 2020**. BT customers were significantly more likely than the market average to have a reason to complain about their service or provider (9%).[17]
- **The most common reason for landline customers to complain about their service or provider related to a service issue** (51%), such as poor call line quality or loss of service. This was followed by a billing, pricing or payment issue (36%), then dissatisfaction with customer service (20%).
- **There was no change since 2019 in overall satisfaction with landline complaint handling, or the percentage of complaints resolved on first contact**. There were, however, declines in satisfaction with complaints handling for EE (48% vs. 59%) and Sky (54% vs. 60%) compared to 2019.
- **TalkTalk and Virgin Media were less likely than average to have resolved a complaint on first contact** (36% and 38% respectively, compared to the landline average of 43%).

Figure 12: Handling of landline complaints

Average Landline	BT	EE	plusnet	sky	TalkTalk For Everyone	Virgin media

[16] The average 'recommend to a friend' score in the landline market was 3. BT (0), EE (11) Plusnet (6), Sky (10) and TalkTalk (8) have 'recommend to a friend' scores that are between 0 and 50 and therefore considered 'good' based on global NPS standards, while Virgin Media's 'recommend to a friend' score is below 0 (-11).
[17] Ofcom Reason to Complain Tracker 2020.

Overall satisfaction with complaints handling	53%	56%	48%	48%*	54%	50%	50%
Complaints completely resolved on first contact	43%	46%	40%	39%*	46%	36%	38%

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

Source: Ofcom Complaints Handling Tracker 2020 (see Note F in Annex 1 for more information).
** low base size (89) treat as indicative only.*

Complaints to Ofcom

As with broadband, EE generated the fewest landline complaints to Ofcom per 100,000 subscribers. TalkTalk generated the highest volume of complaints per 100,000 subscribers, while the average number of landline complaints per year per 100,000 subscribers fell from 38 in 2019 to 35 in 2020.

Landline:
Complaints per 100,000

Fewest complaints	2020	Year-on-year change
EE	12	-5
sky	16	-3
BT	29	-2
Industry average	35	-3
Post Office	41	7
Virgin media	45	-4
plusnet	48	-30
vodafone	55	-11
TalkTalk For Everyone	59	-10
Most complaints		

Source: Ofcom, 2020. All figures are rounded to the nearest whole number; the industry average relates only to the providers included in the analysis.

Broadband and landline: provisioning and repair

Summary of provisioning and fault repair

	Average	BT	EE	KCOM	plusnet	POST OFFICE	sky	TalkTalk For Everyone	Virgin media	vodafone
Average days to deliver (all provisions)	13	13	14	9	14	16	14	14	4	15
Average days to switch to a new provider	14	14	15	15	15	16	14	15	10	15
Average days to deliver a change of service (same provider)	7	10	7	8	9	16	10	13	0	N/A
Average days to deliver a home move (same provider)	14	13	14	11	16	17	N/A	14	10	16
Proportion of orders delivered by date agreed	85%	75%	94%	100%	77%	96%	95%	91%	86%	83%
Faults per 1000 customers per month	46	53	64	31	12	23	39	54	40	79
Average time to repair a total loss of service (days)	2	3	3	0	3	3	2	2	1	3
Proportion of re-contacts	15%	29%	17%	12%	17%	11%	6%	6%	3%	7%
Proportion of appointments missed	2.7%	N/A	2.2%	0.9%	5.5%	5.5%	2.8%	2.2%	3.0%	N/A

Source: Ofcom / provider data, 2020. See Annex 3 for methodology. Results are 'N/A' where providers were unable to provide comparable data.

Getting a new service

- **Across all provision types, landline and broadband orders took 13 days on average to complete**. As in 2019, orders for a change of service from an existing supplier (such as an upgrade to a higher-speed service) were completed more quickly, on average, than home moves or a change of service to a new provider. Changing service from the same provider took seven days, while home moves and switching to a new provider both took an average of 14 days.[18]
- **Virgin Media was the quickest across all three provision types,** and on average managed to provide a change of service on the same day as the order.[19]
- **Eighty-five per cent of landline and broadband orders were delivered by the agreed date**, compared to 87% in 2019. This was lower in rural areas, where 78% of all landline and broadband orders were delivered by the date agreed. BT completed the smallest proportion of orders on the date agreed (75%), while KCOM was able to complete 100% of orders on the date agreed.
- Among the providers included in this year's and last year's report, 12% fewer provisioning orders were completed in 2020 than in 2019.[20]

Fault repair

Number of faults

- **Across major providers there were 46 faults a month, of any kind, per 1000 customers**. This includes any landline or broadband fault that took place in 2020, as opposed to only those that resulted in a total loss of service.
- Not all faults are the result of a failure of the service or network provider. Sometimes the cause of the fault is in the customer's own property, such as problems with in-home wiring or misconnections between devices. In 2020, 56% of faults resulting in total loss of service were within the customers domain, same as in 2019.

[18] 2020 is the first year in which Ofcom has received a full year of data from all providers. Although the methodology is consistent and allows year-on-year comparisons to be made, these should be treated with caution, given the exceptional circumstances of the Covid-19 pandemic.
[19] Switches between providers using the Openreach or KCOM copper networks (including fibre to the cabinet) take 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 (e.g. if they are told they need to pay an early termination charge). Ofcom is currently consulting on proposals to introduce a new switching process for landline and broadband services, regardless of provider or the technology or network used. This could potentially reduce switching times to one working day from December 2022. See Quick, easy and reliable switching for more information.
[20] Ofcom analysis of 2019 and 2020 provisioning data from BT, EE, KCOM, Plusnet, Post Office, Sky, TalkTalk, and Virgin Media.

Figure 13: Faults per 1000 customers per month

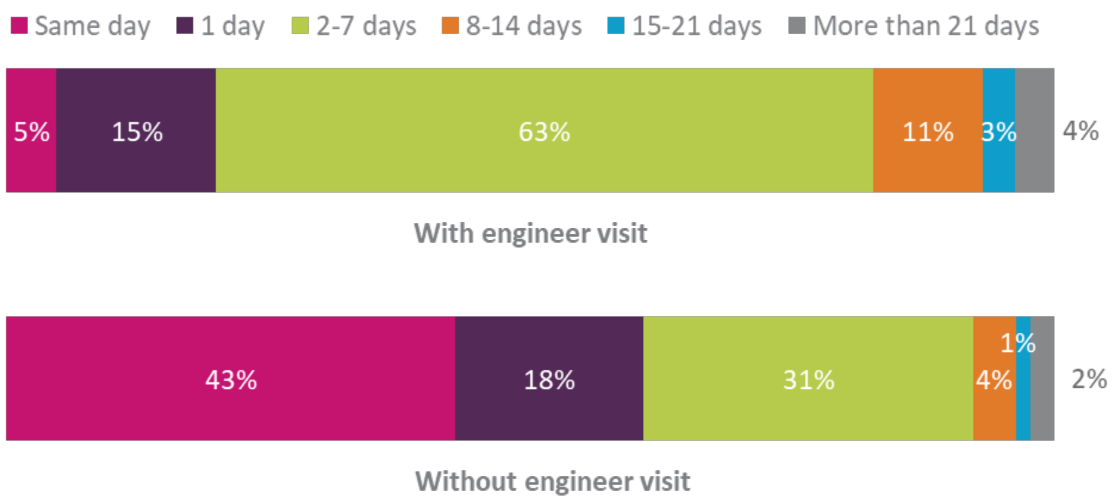
	BT	EE	KCOM	plusnet	POST OFFICE	sky	TalkTalk For Everyone	Virgin media	vodafone
Faults per 1000 customers per month - 2019	**45**	**63**	**34**	**N/A**	**23**	**48**	**47**	**49**	**N/A**
Faults per 1000 customers per month - 2020	**53**	**64**	**31**	**12**	**23**	**39**	**54**	**40**	**79**

Source: Ofcom / provider data, 2019/2020. Results marked N/A where figures were not included in 2019. See Annex 3 for methodology.

Fault repair times

- **Faults resulting in total loss of service were resolved on average within two days** (as in 2019), with nine in ten (89%) total loss of service faults solved within a week.
- **When an engineer was required to fix a fault, it typically took two days longer** to have the fault resolved than if an engineer was not required (four days when an engineer was required, compared to two without an engineer). This was also the case in 2019.

Figure 14: Distribution of repair times with / without an engineer visit



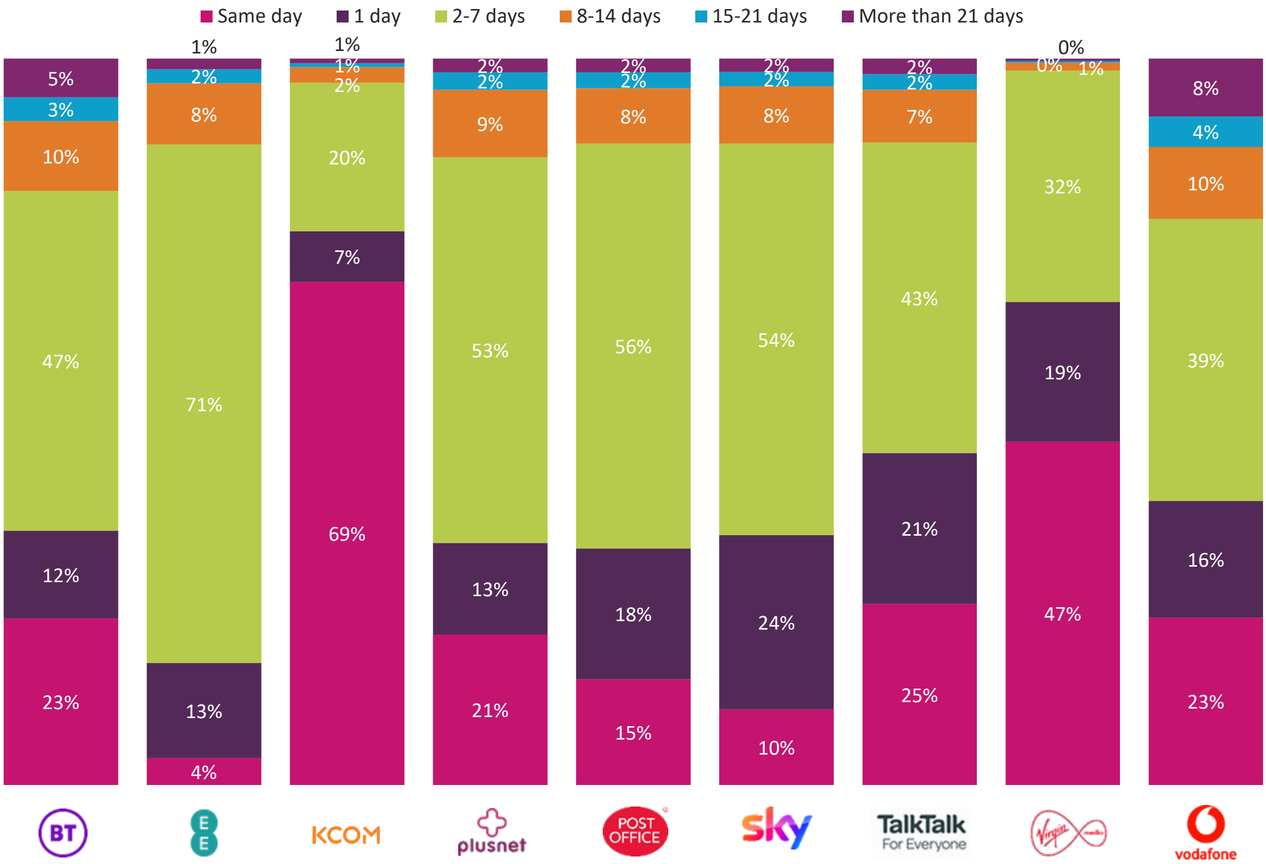
Source: Ofcom / provider data, 2020. See Annex 3 for methodology.

- **Virgin Media and KCOM were able to resolve a fault faster, on average, than other providers.** KCOM was the quickest, on average, to restore a customer's service and was able to resolve most total loss of service faults on the same day, while Virgin Media had the highest proportion of total loss of service faults solved within a week, at 98%.[21]

[21] BT, EE, Plusnet, Post Office, Sky, TalkTalk and Vodafone all provide a service using the Openreach network. For customers of these providers, how quickly a network fault is fixed depends in part on when the issue is referred to Openreach and the level of service the provider has paid for from Openreach.

- **Vodafone had the lowest proportion of total loss of service faults solved within a week,** at 78%, as well as the highest proportion of faults that took longer than 28 days to resolve (6%).

Figure 15: Distribution of repair times, by provider



Source: Ofcom / provider data, 2020. See Annex 3 for methodology.

- **The majority of the faults resulting in a total loss of service were fixed at the first attempt, although there were notable variations between providers.** On average, 15% of customers had to re-contact their provider within 48 hours regarding their faults.
- **BT had the highest proportion of re-contacts,** with more than one in four (29%) customers having to re-contact BT about their fault (up from 18% in 2019). Virgin Media had the lowest proportion of re-contacts, at only 3% of customers.

Missed appointments

Overall, 2.7% of repair and provision appointments were missed in 2020.[22] Plusnet and Post Office had the highest proportion of appointments missed, at 5.5%, while KCOM had the lowest proportion of appointments missed, at under 1%.

Figure 16: Proportion of appointments missed, by provider: 2020

	Average	EE	KCOM	plusnet	POST OFFICE	sky	TalkTalk	Virgin media
Proportion of appointments missed	1.9%	2.2%	0.9%	5.5%	5.5%	2.8%	2.2%	3.0%

Source: Ofcom analysis of provider data, 2020. See Annex 3 for methodology.

Automatic compensation scheme

The automatic compensation scheme requires that signatories pay compensation to landline and broadband customers for delayed repairs following a total loss of service, missed repair or provision appointments, and delays to the start of a new service, without the customer having to ask for it. Last year we reported how the scheme had generated more compensation for customers who had experienced problems with their service, and that between July to December 2019, more than £20.7m was paid in automatic compensation, with almost 600,000 payments made. Since then we have seen more providers join the scheme: 89% of broadband and 85% of landline customers are now covered by it.[23]

In March 2020, given the challenging circumstances presented by the Covid-19 pandemic, we published an update on our website to explain our view: that it would be legitimate for providers to temporarily not pay automatic compensation, as if the civil emergencies exception in the scheme applied. This resulted in fewer automatic compensation payments being made than in 2019.

Changes at the network level, and in engineer availability, meant that by July all signatories were able to restart paying automatic compensation for at least some service issues. However, there continue to be circumstances in which it remains legitimate for providers not to pay automatic compensation because of Covid-19. For example, problems might require an engineer's visit to a customer's home, which might not be possible if the customer is self-isolating.

Figure 17 shows that over £27.5 million was paid in automatic compensation in 2020. These figures do not include any compensation that was paid outside the scheme.

[22] This includes appointments missed by providers' own engineers, Openreach engineers, and other third-party engineers. This figure does not include Vodafone appointments – Vodafone was unable to provide comparable data on this metric.
[23] BT, Sky, TalkTalk, Virgin Media and Zen Internet were signatories to the scheme when it launched in April 2019. Hyperoptic joined the scheme in October 2019, Utility Warehouse joined in February 2020, and EE joined the scheme in May 2021.

Figure 17: Amount of automatic compensation paid

Service issue	Amount of automatic compensation paid 2020
Delayed repair following loss of service	£11.0m
Missed appointments	£2.8m
Delayed provision of a new service	£13.7m

Source: Ofcom analysis of provider data, 2020. See Annex 3 for methodology.

Figure 18 shows that in 2020 there were around 726,000 incidents of either loss of service, delayed provision or missed appointments for which a customer received automatic compensation.

Figure 18: Number of automatic compensation payments made

Service issue	Volume of automatic compensation payments 2020
Delayed repair following loss of service	333,000
Missed appointments	113,000
Delayed provision of a new service	280,000

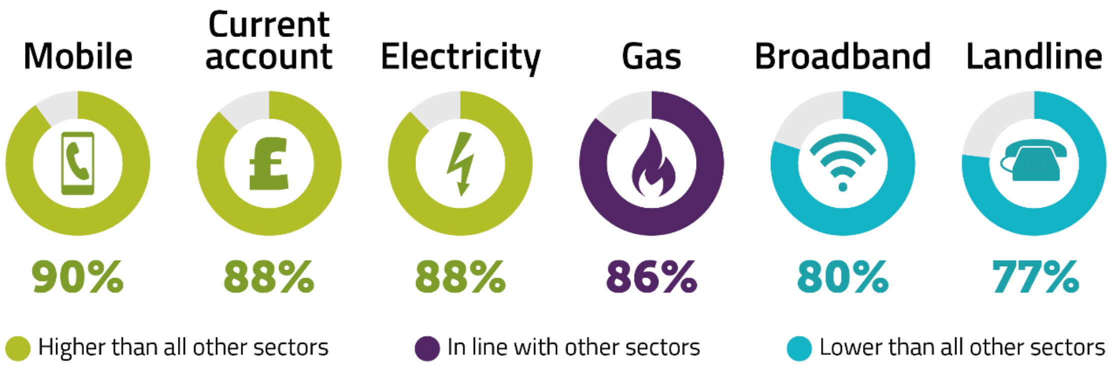
Source: Ofcom analysis of provider data, 2020. All figures are rounded to the nearest 1,000. See Annex 3 for methodology.

Ofcom's analysis of the data provided found that the amount of compensation that signatories paid in these instances is in line with the amounts that signatories are required to pay out under the scheme. Barring any improvement in service quality, we expect the amount of automatic compensation paid to return to closer to 2019 levels, now that processes for operating during the pandemic are established, and as restrictions ease.

Comparison with other sectors

Mobile customers' satisfaction with their overall service was higher than for gas, broadband and landline providers, and in line with satisfaction with bank current accounts and electricity providers. Broadband and landline customers' satisfaction were in line with each other, but lower than all other sectors.

Figure 3: Overall satisfaction with services from communications providers, compared to current account and energy providers



Source: Ofcom Customer Satisfaction Tracker November / December 2020 (see Note A in Annex 1 for more details).

Annex 1: Consumer research source details

Note A

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

***Base:** All adults aged 16+ who are the decision maker and express an opinion on their landline service (1997), their mobile phone service (2556), their fixed broadband service (2274), their pay TV service (1300), their services taken with the same supplier (2004), their main current account provider (2476), their gas only provider (197), their electricity only provider (493). 'Don't know' responses have been excluded from the base.*

Note B

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

Base: All adults aged 16+ who are the decision maker and express an opinion on their mobile phone service (2556), receiving their service from EE (487), giffgaff (174), O2 (428), Tesco Mobile (233), Three (272), Virgin Mobile (237), Vodafone (336), on a contract (1982), on prepay (555). 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.

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

Base: 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 (2134), receiving their service from EE (394), giffgaff (174), O2 (428), Tesco Mobile (231), Three (271), Vodafone (322).

NB. Base size for Virgin Mobile for question M3 (85) is too low to report on.

M4: And how satisfied are you overall with the reception or signal strength that you get on your mobile phone service from (MOBILE PHONE SERVICE PROVIDER)? Would you say you are…

Base: All adults aged 16+ who are the decision maker and express an opinion on their mobile phone service (2556), receiving their service from EE (487), giffgaff (174), O2 (428), Tesco Mobile (233), Three (272), Virgin Mobile (237), Vodafone (336), on a contract (1982), on prepay (555). 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 C

QN2: Based on your overall experience of (MOBILE PHONE SERVICE PROVIDER) as your mobile phone service provider, how likely would you be to recommend them to a friend or family member as a mobile phone service provider? Please give a rating on a scale of 0 to 10, where 0 is 'Extremely unlikely' and 10 is 'Extremely likely'?

Base: All adults aged 16+ who are the decision maker and express an opinion on their mobile phone service (2556), receiving their service from EE (487), giffgaff (174), O2 (428), Tesco Mobile (233), Three (272), Virgin Mobile (237), Vodafone (336), on a contract (1982), on prepay (555). Providers used by fewer than 100 respondents are not shown individually but are included in the total.

Note D

Q.5 Have you personally had a reason to complain about any of these services or suppliers in the last 12 months, whether or not you went on to make a complaint?

Base: All UK households 16+ with mobile: average mobile (6246), BT (221), EE (1188), giffgaff (402), O2 (1121), Tesco Mobile (572), Three (687), Virgin Mobile (470) and Vodafone (874).

Note E

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 2020: All who complained about the mobile service in past six months (3386), EE (753), giffgaff (248), O2 (681), Tesco Mobile (348), Three (533), Virgin Mobile (255), Vodafone (568). **Base for 2019**: All who complained about the mobile service in past six months (2951), EE (647), giffgaff (207), O2 (604), Tesco Mobile (304), Three (454), Virgin Mobile (200), Vodafone (535).

Note F

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

Base for 2020: All who complained about the mobile service in past six months (3386), EE (753), giffgaff (248), O2 (681), Tesco Mobile (348), Three (533), Virgin Mobile (255), Vodafone (568).

Base: for 2019: All who complained about mobile service in past six months (2951), EE (647), giffgaff (207), O2 (604), Tesco Mobile (304), Three (454), Virgin Media (200), Vodafone (535).

Note G

IN2/IN4/IN5: In terms of your fixed broadband service, how satisfied are you with the overall service/ reliability of your fixed broadband service / speed of service while online from (FIXED BROADBAND INTERNET PROVIDER)? Would you say you are…

Base for each of IN2, IN4 and IN5: All adults aged 16+ who are the decision maker and express an opinion on their fixed broadband internet service (2274), receiving their service from BT (438), EE (141), Plusnet (155), Sky (438), TalkTalk (298),Virgin Media (536). 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 H

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

Base: All adults aged 16+ who are the decision maker and express an opinion on their fixed broadband internet service (2274), receiving their service from BT (438), EE (141), Plusnet (155), Sky (438), TalkTalk (298),Virgin Media (536). Providers used by fewer than 100 respondents are not shown individually but are included in the total.

Note I

L1/L3 – L1: I'd like to ask you some questions about your home landline service from (LANDLINE PROVIDER). In terms of your landline service, how satisfied are you with the overall service provided by (LANDLINE PROVIDER)? Would you say you are…**L3**: And how satisfied are you with the reliability of your landline service from (LANDLINE PROVIDER)? IF NECESSARY: By reliability, I mean being able to make a call when you need to, so getting a dialling tone? Would you say you are…

Base for each of L1 and L3: All adults aged 16+ who are the decision maker and express an opinion on their landline service (1997), receiving their service from BT (465), EE (119), Plusnet (125), Sky (384), TalkTalk (276), Virgin Media (411). 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

QN1 Based on your overall experience of using (LANDLINE PROVIDER) for your landline service, how likely would you be to recommend them to a friend or family member as a landline provider? Please give a rating on a scale of 0 to 10, where 0 is 'Extremely unlikely' and 10 is 'Extremely likely'?

Base: All adults aged 16+ who are the decision maker and express an opinion on their landline service (1997), receiving their service from BT (465), EE (119), Plusnet (125), Sky (384), TalkTalk (276), Virgin Media (411). Providers used by fewer than 100 respondents are not shown individually but are included in the total.

Note K

Q.5 Have you personally had a reason to complain about any of these services or suppliers in the last 12 months, whether or not you went on to make a complaint?

Base: All UK households with fixed broadband 16+: average broadband (6153), BT (1278), EE (295), Plusnet (419),, Sky (1245), TalkTalk (734), Virgin Media (1439) and Vodafone (268).

Note L

Q.5 Have you personally had a reason to complain about any of these services or suppliers in the last 12 months, whether or not you went on to make a complaint?

Base: All UK households 16+ with a landline: average landline (5685), BT (1382), EE (264), Plusnet (368),, Sky (1142), TalkTalk (689), Virgin Media (1204) and Vodafone (258).

Note M

Q9/Q12 – Q9: Overall, how satisfied are you with the service you received from [Provider] customer services with regard to the complaint that you had? …**Q12:** You said that your complaint was completely resolved, was it completely resolved on your first contact with [Provider]? **Base for each of Q9 and Q12 2020:** All who have complained about Broadband service in the last six months (3202), BT (642), EE (293), Plusnet (241), Sky (707), TalkTalk (567), Virgin Media (752).

Base for each of Q9 and Q12 2019: All who have complained about Broadband service in the last six months (2897), BT (632), EE (204), Plusnet (214), Sky (611), TalkTalk (539), Virgin Media (697)..

Note N

Q9/Q12 – Q9: Overall, how satisfied are you with the service you received from [Provider] customer services with regard to the complaint that you had? …**Q12:** You said that your complaint was completely resolved, was it completely resolved on your first contact with [Provider]?

Base for each of Q9 and Q12 2020: All who have complained about Landline service in the last six months (2411), BT (599), EE (238), Plusnet (89), Sky (629), TalkTalk (373), Virgin Media (483).

Base for each of Q9 and Q12 2019: All who have complained about Landline service in the last six months (2039), BT (543), EE (157), Plusnet (89), Sky (493), TalkTalk (326), Virgin Media (431).