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1. Executive Summary

1.1 Introduction

In March, 2014, Ofcom commissioned Futuresight to conduct exploratory qualitative research among consumers intending to switch one or more communications services. The overall objective was to understand the experiences consumers have when trying to switch.

The research examined these experiences at various key stages in the switching journey, covering initial engagement with the market, assessment of switching options, decision-making on whether to switch or not, and completion among those who decided to switch. The research investigated consumer experiences at these stages in the pay TV, fixed landline, fixed broadband and mobile markets, with a particular focus on . . .

- Motivations for switching
- Perceived availability and limitations of choice
- The impact that interactions with current and potential gaining providers have on the decision to switch
- What consumers gain or lose by switching or not switching
- The impact of current switching processes

Full details of the research background and approach can be found in Section 2 of this report and Appendix 4.1. In brief, the key details are as follows . . .

- This was a qualitative study in the form of introductory and reconvened focus group discussions in combination with an interactive online diary¹.
- A total of 158 respondents took part (96 in the pay TV and fixed landline and broadband markets, and 62 in the mobile market).
- All participants in the study were consumers who said they were either out of contract or nearing the end of their contract and actively looking to switch
- The fieldwork was conducted between April and November 2014.

In addition, a list of key definitions of terms referred to in this report may be found in Section 2.6.

¹ A paper-based version of the diary was provided for n=6 respondents who were not online.
1.2 Summary of key insights from the research

1.2.1 Key switching outcomes for each market

Just over a third of the total sample switched their provider and just under two-thirds decided to stay with their current provider.

Switching in the mobile sample was higher than in the fixed landline, broadband and pay TV samples: around 4 in 10 participants switched their mobile network provider and around 3 in 10 switched their landline, broadband and / or pay TV provider. Nearly two-thirds of mobile switchers ported their number. All landline switchers ported their number.

In the fixed and pay TV samples, switching levels were highest among consumers switching either a dual play bundle or fixed broadband service only. Switching levels were lowest for standalone pay TV and triple play bundles.

1.2.2 Engagement: the point at which a customer decides to enter the market with a view to switching

Key motivations for wanting to switch were mainly reactive.

Reactive motivations tended to relate to either an acute or gradually increasing problem with the provider and / or service. Others (a minority of this sample) were more proactive and routinely assessed their options or were motivated to seek out better quality or a new type of service.

Focusing on reactive motivations: by definition, an acute problem was severe and sudden. The main examples were a service failure or a substantial price increase. Factors of these kinds normally triggered an immediate and resolute response by the customer to seek a better solution.

The need to address a gradually increasing problem varies by service and life-stage and, by nature, tended to be easier to tolerate and put off. Engagement in this context required a ‘tipping point’ via one (or more often a combination) of the following . . .

- An increased need for the service
- A deteriorating service
- A price increase
- Poor customer service
- Better offers available to new customers only (from their existing provider)
- Better offers available from other providers.
We have characterised three alternative mind sets as drivers of the length of time spent deliberating whether to make an assessment of their options, as follows:

- ‘Resolute’ (i.e., the highest priority to engage immediately)
- ‘Slow start’ (i.e., engagement is diarised for a later date)
- ‘Procrastination’ (i.e., action is delayed until the problem worsens or the need increases).

There was very little drop out across the sample at this stage. Most went on to assess their options but this was often accompanied by uncertainty and nervousness about things going wrong.

This uncertainty and nervousness was driven in the main by the stated importance of communications services to participants. Related to this was a fear of losing a service they rely on and, for many, the perceived effort and hassle of having to ‘undo’ their switch if something were to go wrong.

1.2.3 Assessment: the point at which, having decided to engage with the market, a customer assesses their options

The key motivation to assess is to gain knowledge and confidence in the decision to switch or stay put.

For several participants, it was felt that assessment boosts their confidence to deal with their current provider and potential new providers from a position of strength. This was also felt to help avoid being ‘bamboozled’ by potential new providers or persuaded by their current provider to stay without gain.

The main driving force with assessment for most was to gain a better deal or service quality from their current provider, to avoid the risk / hassle of switching to a new provider if they could.

In this, many sought information that helped to empower themselves with their current provider; much more so than with a potential new provider.

Success with empowerment (with either their current provider or a new provider) varied across the services, and is linked to differences in perceived choice and the diligence / savviness required to navigate the communications markets, and is explained below.

The more diligent and tech savvy obtained greater certainty and confidence about what they can and cannot get.

More diligent and tech savvy consumers tended to explore several alternative providers, including smaller/less well-known providers. Others, explored their options more fully within the bounds of a limited selection of the largest/most well-known providers.
Those with a more diligent approach to assessment tended to be most likely to gain with either their current provider or a new provider. This is explored more in the Act section below.

The least diligent and savvy perceived (at least) there to be a limited choice of alternative providers. This led to a comparison of a small number, or in some cases only one other provider and less empowerment and confidence.

Many who were intending to switch a standalone service (i.e., fixed landline only and pay TV only), or a triple-play bundle, dropped out at this stage.

Drop-out among those switching standalone services was driven by stated difficulty finding a provider offering standalone services, and what was thought to be a strong industry focus on bundling.

Drop out among triple play intenders tended to be in multiple person households. These participants said they had difficulties finding a bundle that met the differing needs in the household, i.e., both a fast internet connection speed and optimum channel choice. This was compounded by the higher perceived risk of getting it wrong.

Drop out was lowest at this stage for those intending to only switch their broadband service, and those intending to switch their mobile. This appears to be due to the comparable ease of making an assessment of these services.

Finally, a change in our characterised mind set appears to occur at this stage.

Many of the ‘Resolute’ became ‘Delayed’, given other unavoidable and unrelated priorities, or found that assessment was more difficult / time-consuming than originally anticipated.

1.2.4 Act: Having assessed the market, the process that a customer goes through in order to reach a decision to switch or stay put

Participants at this stage felt confident that they could gain by switching. Most, though, had not made a final decision on whether to switch.

It is important to note that not all participants were undecided at this stage. A minority made a decision very quickly and, in effect, went straight from assessment, to complete. These participants were the most resolute and determined to switch, and having largely made their decision to switch during their assessment, had no wish to negotiate with their current provider. In some cases, their decision was made at the very outset (with assessment serving to support their decision).

For the majority, rather than a step taken after assessment, this stage can be classified as a continuation of assessment. It centres around participants finding out what gains might be available from their current provider, before making their final decision.
For these participants, who were still undecided, most had at least some level of confidence that they could gain by either switching or notifying their current provider that they were ‘thinking of’ switching.

As such, ‘Act’ amounted to a process of weighing up the effort and risk of changing to a new provider, versus the likelihood of success in negotiating a comparable or better deal with their current provider (in order to avoid the effort and risk of changing). For many, a more developed discussion with their current provider was viewed as beneficial (and potentially fruitful) before making a final decision.

**Most of these participants had not sought to negotiate with their current provider during their assessment.**

Some contacted their current provider early on in their assessment, mainly to check on whether they were out of contract, but deferred negotiation until after they had assessed their options (chiefly as a means to empower themselves).

**Once this was done, most sought to negotiate prior to their final decision and claimed that they saw benefit in doing so.**

This behaviour was driven by their desire to gain (if they could) without switching. In this way, the stated intention among the majority was to use their new-found confidence (through assessment) to seek an offer from their current provider if they could, rather than switch. In short, the stated aim was to get from their current provider what they could gain elsewhere, **without** the perceived hassle and risk of switching.

**Some were more successful with negotiations than than others, with success driven by a combination of factors.**

These factors were: the range of alternative providers and options established during assessment, the perceived level of gain that could be achieved elsewhere, and the willingness of their current provider to respond to their needs.

In this, participants were more or less empowered to negotiate with their current provider: Some felt that they had a good range of alternative providers to choose from and could gain substantially elsewhere. This was felt to give them the most amount of ‘leverage’ over their current provider, resulting in an offer they accepted, and were pleased with.

Others who were much less empowered became ‘resigned’ to staying with their current provider, without gain (or with only limited gain) given their stated difficulties in finding alternative providers and options elsewhere and (normally considered to be related to this) a disappointing response from their current provider.
There was a large amount of drop-out at this stage, due to successful negotiations with their current provider.

Many who dropped out succeeded to gain sufficiently from their current provider and, in turn, perceived that new providers could not offer them sufficient gain to compensate for the hassle and risk of switching. A minority felt the offer from their current provider was insufficient and that the gain they could make elsewhere was worth the perceived effort/risk, and so moved onto ‘complete’, along with those who made their decision to switch during their assessment.

1.2.5 Complete: the point at which, having assessed the market and made the decision to switch, the transfer of service is made

These participants felt the gain was sufficient and certain enough to justify switching.

In contrast to the drop-out noted in ‘Act’, the key motivation to ‘Complete’ was that the actual or perceived gain from switching was felt to be sufficient and certain enough to justify the actual or perceived effort and risk of changing to a new provider. As noted above, some of these participants made their decision to switch during (or even before) assessment, and others did so following unsuccessful negotiations with their current provider. This also included a few who had no contact with the current provider other than to cancel their existing contract.

In the main, interaction with their current provider (among those who had not done so already) was driven purely by a need to minimise risks, and ensure that their contract was cancelled (and that no penalty was payable). For these participants, the decision to switch was made prior to any interaction and there was no interest in seeking to negotiate with their current provider.

The ease / convenience of the switch varied by switching process.

Typically, participants who were identified to have switched using the GPL Not process found it a positive experience. Most of those who switched and retained their mobile number using an LPL process did not report any significant problems. Some though complained that having to obtain a code their current provider made the switch more difficult than it was thought it should be and, in some instances, caused delay and additional time and effort. Cease & Re-provide (C&R), where we identified this process to have been used, was seen to be particularly demanding when it involved multiple services.
There was a very low level of drop out at this stage. Typically, those in the sample who reached this stage were the most resolute and determined to switch.

This was strengthened by the level of perceived choice they had (in terms of alternative providers / options) and a determination to reject or even avoid attempts by their current provider to persuade them to stay.
2. Introduction

2.1 Background

For the communications market to function well, consumers need to be able to switch easily. Switching allows consumers to take advantage of choice: to purchase devices and services that best meet their needs and to easily move away from a provider that they are dissatisfied with or that is no longer meeting needs.

Ofcom has a principal duty to further the interests of consumers in relevant markets, where appropriate by promoting competition. In light of this duty, Ofcom’s objectives in relation to switching are to ensure that:

   i) It is easy and convenient for consumers, now and in the future, to change their communications provider where they wish to do so.
   ii) Consumers are appropriately protected throughout the switching process.
   iii) Switching processes do not act as a barrier to competition.

In March 2014, Ofcom commissioned Futuresight to conduct exploratory qualitative research among consumers intending to switch one or more communications services in the pay TV, fixed (landline and broadband) and mobile markets. The overall aim of this research was to better understand the steps consumers take when seeking to switch, and any difficulties they face in this. This report presents the findings of the research study.

2.2 Research objectives

The overall aims of this study were to:

- Understand the experiences consumers have when trying to switch, including:
  - Key motivations for wanting to engage with providers
  - Key drivers by sector / market
  - Life-stage and affordability factors
  - Key triggers and concerns that influence the decision to proceed further
  - The role and function of assessment and assessing the market
  - Perceived limitations in choice – by sector / market
  - Key triggers and tipping points in making the decision to switch or not switch
  - Impact of interactions with current and potential gaining providers on the decision
  - What consumers lose or gain by switching or not switching
  - Awareness and impact of different switching processes (GPL NoT, LPL and C&R)
  - Timing patterns and drop out levels across the switching journey.

- To address the above in each of the communications markets: fixed line, mobile (post- and pre-pay\(^2\)), fixed broadband and digital pay TV.

\(^2\) Only pre-pay customers who wished to port their phone number were represented.
A more detailed description of these research objectives (and how they were addressed in this study) may be found Appendix 4.1.

### 2.3 Method and Sampling

Given the exploratory nature of this study, a qualitative approach was used that combined a series of introductory and reconvened focus group discussions with the use of an interactive online diary. A total of 158 respondents participated in the study across the following four stages:

**Figure 1: Key research stages**

<table>
<thead>
<tr>
<th>Stage:</th>
<th>Format:</th>
<th>Purpose:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stage 1:</td>
<td>75 minute focus groups:</td>
<td>To meet and brief participants on what was required of them</td>
</tr>
<tr>
<td></td>
<td></td>
<td>At a spontaneous level, to capture some general background on each participant</td>
</tr>
<tr>
<td>Stage 2:</td>
<td>In-the-moment observation:</td>
<td>Use of an online diary to capture thoughts and actions in real-time</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Interaction at key moments to seek clarification and elaboration on key thoughts and actions</td>
</tr>
<tr>
<td>Stage 3:</td>
<td>90 minute reconvened groups:</td>
<td>Review of diary content and in-depth assessment of the switching experience ‘journey’</td>
</tr>
<tr>
<td>Stage 4:</td>
<td>Follow-up individual telephone interviews:</td>
<td>Assessment of post-switching decision experiences and review of diary content among those who had deferred</td>
</tr>
</tbody>
</table>

The focus groups at Stages 1 and 3 each comprised on average 9 respondents and were conducted across all four nations of the UK, representing both urban and rural locations. See Appendices 4.3 and 4.6 for a detailed breakdown of the sample achieved in each location.

All participants in the study were consumers who, at the time they were recruited, said they were:

- Either out of contract or nearing the end of their contract and actively looking to switch
- Not looking to switch because of a house move
- The principal or joint decision-maker for communications services (used personally and/or installed in the home)
- Not working or involved in any way in the communications services industry (including close members of family).

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3 A paper-based version of the diary was provided for n=6 respondents who were not online.
The sample reflected a good balance of ages, life-stages and male to female ratio. All four stages of the fieldwork were conducted between April and November 2014. In summary, the final sample achieved was as follows:

**Figure 2: Sample achieved for fixed landline, broadband, pay TV services and current providers**

<table>
<thead>
<tr>
<th>Intending to switch:</th>
<th>BT</th>
<th>Sky</th>
<th>Orange</th>
<th>TalkTalk</th>
<th>Virgin Media</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standalone options:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Landline only</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Broadband online</td>
<td>3</td>
<td>6</td>
<td>4</td>
<td>3</td>
<td>3</td>
<td>19</td>
</tr>
<tr>
<td>Pay TV only</td>
<td>4</td>
<td>5</td>
<td>1</td>
<td>3</td>
<td>13</td>
<td></td>
</tr>
<tr>
<td>Multiple services4</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>Bundled options:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dual play</td>
<td>9</td>
<td>5</td>
<td>6</td>
<td>9</td>
<td>4</td>
<td>33</td>
</tr>
<tr>
<td>Triple play</td>
<td>1</td>
<td>8</td>
<td>3</td>
<td>8</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td><strong>Total:</strong></td>
<td>21</td>
<td>27</td>
<td>10</td>
<td>18</td>
<td>19</td>
<td>96</td>
</tr>
</tbody>
</table>

**Figure 3: Sample achieved for mobile service and current providers**

<table>
<thead>
<tr>
<th>Intending to switch:</th>
<th>O2</th>
<th>Orange</th>
<th>Three</th>
<th>T-Mobile</th>
<th>Virgin Mobile</th>
<th>Vodafone</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>10</td>
<td>11</td>
<td>9</td>
<td>11</td>
<td>10</td>
<td>11</td>
<td>62</td>
</tr>
</tbody>
</table>

A more detailed breakdown of the sample achieved may be found in Appendix 4.3.

### 2.4 A note on the method

A qualitative approach was considered to be the best approach given the in-depth, exploratory nature of the research objectives. It allowed us to probe deeply and to vary our questioning appropriately in relation to how individual participants respond, and to ensure that each response was fully expressed and understood. This also gave participants the freedom to express the issues that were most important to them, progress along their own natural course, and not be restricted or led as they might be by the use of a structured questionnaire. A qualitative approach was particularly appropriate for this study in allowing us to sensitively assess reports of behaviour as they occurred without prompting or ‘leading the witness’.  

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4 One participant intended to switch their landline service (currently with BT), their fixed broadband (currently with Virgin Media) and their pay TV service (currently with Sky).
2.5 Approaching the subject and the use of an interactive diary

In designing the study, there were a number of critical elements that needed to be considered carefully. These elements were as follows . . .

- Recruiting and representing certain hard-to-reach sub-groups
- Capturing consumers’ experience of switching ‘in the moment’, as well as any and all written documentation collected, received and shared during the switching process
- Mitigating the risk of the research process itself unduly influencing customer behaviour when switching
- Providing an appropriate level of support and advice to participants to ensure that they go through the process of switching as they would do naturally, and that they are not encouraged in any way by us to switch
- Incentivising respondents appropriately at different stages in the process, to ensure that they are sufficiently motivated to conduct whatever process they undertake and not be unduly influenced in how they go about it
- Capturing the participants’ ‘journey’ in its entirety, i.e., covering: triggers and barriers related to the initial consideration to switch, the decision-making process, behaviour and approach in the moment of switching, and their experiences and satisfaction having made the switch.

Capturing consumers’ experiences of switching ‘in the moment’ was an issue of particular importance in this study given that, typically, details of experiences during the switching journey are not easily recalled after the event. For this reason, an interactive online diary was designed to allow participants to record their experiences individually in real time as they progressed. The diary also allowed us to interact with participants at appropriate moments, to seek clarification or elaboration though not, of course, to lead or direct them in any way.

The output from these individual diaries, along with written correspondence, provided us with a rich set of stimuli for Stage 3. This stimuli acted effectively as an aide-memoire for each participant, as we tracked through their journey. It also helped to ‘anchor’ views, encouraging participants to remain faithful to their experience and not allow this to be distorted by the passage of time and / or the influence of other participants’ responses in the focus groups at Stage 3.

See Appendix 4.2 for more detail on the interactive diary used in this study.
Finally, the fieldwork period was dictated by the participants (to ensure that they were not placed under any pressure or obligation to complete their journey more quickly than they would do normally). Timings were adjusted as the study progressed to allow as many participants as possible to attend the stage 3 reconvened groups. The remaining participants, who had not completed their journey by that time, were contacted by phone during stage 4.

2.6 A note on interpretation, analysis and reporting of qualitative data

It is important to note that the findings of this report are not statistically representative of the views of the general public. Qualitative research is designed to be illustrative, detailed and exploratory and provides insight into the perceptions, feelings and behaviours of people rather than conclusions drawn from a robust, quantifiably valid sample.

The perceptions of participants make up a considerable proportion of the evidence in this study, and it is important to remember that although such perceptions may not always be factually accurate, they represent the truth for those who hold these views.

As far as possible we have stated the prevalence of feeling about a particular point across the participants, although in some cases it has not been possible to provide a precise or robust indication of the prevalence of a view, due to the small numbers of participants taking part in the research or within individual segments. This is a generally accepted characteristic of qualitative research.

Verbatim comments have been used throughout this report to help illustrate and highlight key findings. Where verbatim quotes are used, they have been anonymised and attributed with relevant characteristics of user-type and location.

For example: Male, 44, standalone landline intender, Belfast.

The verbatim comments we have included reflect both spontaneous views and views after deliberation, and where relevant we have indicated which types of views are represented. The comments can be taken to reflect genuine views held by participants.

Finally, when reading this report, a number of key definitions should be kept in mind:

Service areas:

- **Post-pay**: A mobile service that is paid for on a pay-monthly contract
- **Pre-pay**: A mobile service for which credit is purchased in advance of service use and is used at the time the service is accessed or consumed
- **Dual play**: use of a fixed landline phone and fixed broadband internet access in a bundle or package from the same provider
- **Triple play**: use of a fixed landline phone, fixed broadband internet access and pay TV service in a bundle or package from the same provider

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5 There are, of course, other combinations of dual and triple play bundling, e.g., fixed broadband and pay TV. The study focused on fixed landline and broadband as the most common form of dual bundling and fixed landline, broadband and pay TV as the most common form of triple play bundling.
• **Standalone:** use of a service that is not purchased from the same provider as other services. The user may have pay TV, landline phone, or broadband internet access, with different providers.

**Customer journey stages:**

• **Engage:** The point at which a customer decides to enter the market with a view to switching

• **Assess:** Search and research activity, once engaged, including any interaction with current and potential gaining providers, that facilitates understanding of the costs, benefits and options available

• **Act:** The point at which a customer makes the decision to either switch or not switch

• **Complete:** The process of managing, coordinating and finalising the switch among those who decide to switch.

**Switching processes:**

• **Gaining Provider Led Notification of Transfer (GPL NoT):** The Gaining Provider deals with the Losing Provider on the customer’s behalf, by notifying, managing and coordinating transfer of the service; there being no need or requirement for the customer to engage with the Losing Provider

• **Losing Provider Led (LPL):** The customer is required to contact the Losing Provider to request a code in order to transfer their current service provided by the Losing Provider to a new service provided by the Gaining Provider. For a customer wishing to port their mobile number, this is a Porting Authority Code (PAC). For a fixed broadband service, for certain technologies and providers, the customer must obtain a Migration Authority Code (MAC).

• **Cease & Re-provide (C&R):** No formal switching process exists. A default process where the customer has to terminate their contract with the Losing Provider and request a new service from the Gaining Provider (though not necessarily in that order). Instead, the customer may request a new service before terminating the contract for their existing service. In either case, the customer is required to coordinate the end of his or her service with the Losing Provider and the start of the new service with a Gaining Provider.

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6 Definitely deciding not to switch is defined as a ‘drop out’. Deciding to delay the decision to switch is defined as a ‘deferral’.
3. Main Findings

3.1 Key switching outcomes for each market

This section provides an overview of the switching outcomes for each of the communications services markets. Full detail on these outcomes may be found in Appendix 4.4.

In summary, switching in the mobile market was higher than in the fixed landline, broadband and pay TV markets: just over a third of the total sample switched their provider and just under two-thirds decided to stay with their current provider. (Caution is required here: %’s are descriptions of the sample on this study and should not be interpreted conclusively as actual incidence levels in the relevant markets).

Figure 4: Switchers versus non-switchers across the total sample

Around 4 in 10 participants switched their mobile network provider and around 3 in 10 switched their landline, broadband and / or pay TV provider. Nearly two-thirds of mobile switchers ported their number. All landline switchers ported their number.

Figure 5: Switchers versus non-switchers across the sample for different services

In summary, switching levels in the sample were highest among consumers switching either a dual play bundle or fixed broadband service only. Switching levels were lowest for standalone pay TV and triple play bundles.
Around two-thirds of those who switched their fixed landline or mobile provider ported their number. Key reasons for porting related to the perceived importance of their number and the desire to avoid the hassle and inconvenience of having to notify friends and colleagues of a change. Key reasons for not porting related, in the main, to avoid the perceived hassle of having to contact their current provider to bring about the transfer. What normally accompanied this was a low level of attachment to their current number, i.e., many felt comfortable about getting a new number.

3.2 Customer context

This section provides some context to participants’ attitudes. It covers general perceptions of communications services, their stated importance to them personally and their household, general attitudes to switching and the level of choice in each of the communications markets.

3.2.1 The importance of communications services and attitudes to switching

Communications services were invariably considered by participants as essential in enabling them to function in modern society. This is supported strongly by a recent Ofcom study focusing on the essential importance of communications services for participation in society. In both studies, it is clear that mobile and internet access are regarded very widely as services that consumers cannot live without. This is due to the essential functions these services have, in the most fundamental areas of personal safety, social inclusion, information and economic prosperity. Key examples are: access to emergency services, keeping in touch with family and friends, access to information, education and entertainment, gaining access to goods and services and being able to run a business or apply for a job. Reliance on these communications services is particularly important given the extent to which others use the same method for communication and transactions.

This essential need has implications for switching, given the weight participants placed on continuity of service. Whilst all in this study had an active need or desire to switch, there was strong and widespread concern in doing so, given the perceived risk of a gap or ongoing loss of reliability or service provision.

Broadly, perceptions of risk in switching communications services appear to be higher and more developed than in other markets (e.g., general insurance, energy). This was due mainly to the ‘technical’ nature of communications services and a typically strong reliance on a provider to fix things and ensure service continuity.

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7 Responses from participants in this study were entirely consistent with evidence obtained in a previous study conducted by Ofcom relating to the essential importance of communications services for participation in society. See: Affordability of Essential Communications Services: http://stakeholders.ofcom.org.uk/market-data-research/other/cross-media/affordability/
Rather than a ‘simple’ switch in billing and administration (as was felt to be the case in the energy market for example), the perceived risk of a loss of service continuity was felt to be higher when switching communications services, given the need to change and reconnect devices and equipment.

For many, the perceived risk of switching was heightened further by lack of certainty regarding the reliability of alternative communications services providers (that are possible to switch to) in terms of trouble-shooting and responsiveness to complaints. This uncertainty is, for some, compounded by mixed messages from the positive and negative experiences and reviews of others about the same provider and service.

In all, this combination of high dependency and low certainty meant a relatively high degree of inertia prior to a decision to ‘engage’, with this decision being driven more strongly by reactive as opposed to proactive factors, i.e., when the current service fails in some way, becomes increasingly perceived to be poor in value, or is progressively unable to meet increasing levels of need.

### 3.2.2 Motivations for switching and level of choice

As described in the main body of this report, motivations for switching were most strongly evident for internet access (in both the fixed and mobile markets). A key motivation for switching for many is related to an increased need for bandwidth. This was due in the main to increased frequency of use of the internet and the need for increased speed and bandwidth, together with increased ownership and use of multiple connected devices. Furthermore, access to new technology, e.g., the latest, or at least an enhanced version of a smartphone, or access to a greater choice of pay TV channels is a motivator for some.

The level of choice – of alternative providers – who can offer a similar or enhanced level of performance is a key determining factor on whether to engage. Participants living and working in rural areas and in urban areas without access to high speed cable or fibre optic services, or reliable 3G (or even 2G) mobile coverage, tended to perceive that they had limited options, despite diligence in searching for them. This in turn, tended to reduce consumer empowerment and despite their need or desire to switch, the evidence suggests that participants who felt they had limited choice were resigned to seeking a better offer or deal with their current provider.

Seeking an alternative was also found to be limited in standalone services, with participants reporting difficulty in finding offers and deals that allowed them to replace a single service, as opposed to having to switch multiple services to an alternative provider. This was particularly evident in the fixed landline market.
Finally, an additional factor that tended to limit proactive switching related to complexity of services and the perceived need for such services to fulfil a variety of different needs in the household. This relates, in the main, to the triple-play market. In particular: purchase decision-makers living in multiple person households, reported a limited choice, with no single triple-play provider offering an optimum combination of high speed internet and pay TV channels.

3.3 Engage

This section sets out the findings that relate to engagement, i.e., the point at which a customer decides to enter the market with a view to switching. It explores the factors that predispose customers to want to switch, and the tipping point that makes them decide to engage when they do. We look at differences by market, life-style, affordability and timing factors, together with stated concerns that influence the way in which participants approach the next stage. Finally, we assess the level of drop out at this stage, (i.e., those who decide not to continue to their next stage) and the reasons for this.

In summary, the key findings are as follows . . .

- **Key motivations for wanting to switch were mainly reactive.**

  Reactive motivations tended to relate to either an *acute* or *gradually increasing* problem with the provider and / or service. Others (a minority of this sample) were more proactive and routinely assessed their options or were motivated to seek out better quality or a new type of service.

  Focusing on reactive motivations: by definition, an *acute* problem was severe and sudden. The main examples were a service failure or a substantial price increase. Factors of these kinds normally triggered an immediate and resolute response by the customer to seek a better solution.

  The need to address a *gradually increasing problem* varies by service and life-stage and, by nature, tended to be easier to tolerate and put off. Engagement in this context required a ‘tipping point’ via one (or more often a combination) of the following . . .

  - An increased need for the service
  - A deteriorating service
  - A price increase
  - Poor customer service
  - Better offers available to new customers only (from their existing provider)
  - Better offers available from other providers.
• We have characterised three alternative mind sets as drivers of the length of time spent deliberating whether to make an assessment of their options, as follows:
  o ‘Resolute’ (i.e., the highest priority to engage immediately)
  o ‘Slow start’ (i.e., engagement is diarised for a later date)
  o ‘Procrastination’ (i.e., action is delayed until the problem worsens or the need increases).

• There was very little drop out across the sample at this stage.

  Most went on to assess their options but this was often accompanied by uncertainty and nervousness about things going wrong.

  This uncertainty and nervousness was driven in the main by the stated importance of communications services to participants. Related to this was a fear of losing a service they rely on and, for many, the perceived effort and hassle of having to ‘undo’ their switch if something were to go wrong.

3.3.1 General motivations to engage

  Most in the sample were only motivated to switch because there was a problem or frustration. Typical problems and frustrations related to a service failure or downtime or significant bill shock. Others were resentful that they were ‘paying over the odds’, prompted by awareness of cheaper competitor offers and / or a better or cheaper service from their current provider available to new customers only.

  “The router has failed again. It’s the final straw”
  Female, 33, dual play intender, London

  “Paying way too much. Just seen an offer from [current provider] for new customers only that is virtually half what I pay”
  Male, 38, dual play intender, Peterborough

  Some in the sample, particularly in the mobile and TV markets, were more proactive in seeking a better quality or choice. This could mean, for example, a better choice of TV channels, a move to high speed broadband (fibre optic) or a new innovation or product launch (e.g., 4G).

  “We want a better channels package. My husband is really into sport”
  Female, 47, triple play intender, Cardiff

  “4G is now available which has got to be something worth looking at”
  Male, 28, mobile intender, London

  A few consider switching proactively as a matter of routine, with communication services being included in the review of other services and utilities like home insurance, car insurance and energy. Coming out of contract was the key trigger to engage.
3.3.2 Key predisposing factors and tipping points

For the majority of participants, the motivation to engage was essentially driven by problems with their existing service or finding that the service no longer met their needs, e.g., additional data-hungry devices driving a need for faster broadband speeds. These issues prompted a ‘need’ to do something. There were two kinds of ‘need’: acute or growing. Both prompted respondents to engage and seek a resolution, but the type of need (i.e. acute or growing) dictated how immediately and resolutely people engaged.

Those with an acute need reached a ‘tipping point’, i.e., a decision to engage, relatively very quickly and claimed to be most resolute about switching. These were people who had suffered a sudden and severe change in service provision, e.g., a service failure, downtime or a substantial bill. This was nearly always accompanied by an inability or unwillingness from their current provider to resolve things or offer a better solution.

For those with a growing need, the tipping point tended to take longer to reach given that, by definition, shortcomings of the current service and provider were easier to tolerate or, by the same token, were more difficult to address given limitations of time and other competing priorities. Often, a combination of factors needed to coincide before these participants would engage to resolve the issue.

Typically, a growing need related to a ‘poor’ but still usable service (e.g., slow fixed internet speed, poor mobile signal coverage, limited choice of pay TV channels). This could be exacerbated by gradually increasing cost, the experience of poor customer service (e.g., difficult to contact, lack of priority), sight of better offers elsewhere and, in particular, awareness that their current provider is offering ‘more for less’ (or at least the ‘same for less’) to new customers only. These factors, in combination, tended to create a building sense of resentment in not getting the best standard of service and not feeling valued by their current provider or rewarded for their loyalty.
We have summarised the two types of need as follows . . .

**Figure 6: Types of ‘need’ to engage and seek resolution**

<table>
<thead>
<tr>
<th>Acute need</th>
<th>Growing need</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image.png" alt="Diagram" /></td>
<td><img src="image.png" alt="Diagram" /></td>
</tr>
</tbody>
</table>

### 3.3.3 Timing patterns

The length of time between deciding to engage with the market to the start point for assessing options, tended to be mediated by these differing needs.

For those with an acute need, the length of time from engagement to assessment was three days on average. These were people in the sample who claimed to be most resolute about switching.

"I want it done and over with. It is my highest priority"

Female, 32, triple play intender, London

Among those with a growing need, the length of time varied depending on how close or far away they were from the tipping point. We identified two different patterns. The first of these we have characterised as ‘Slow starters’, who were closer to the tipping point and were prepared to wait for (and diarise) a suitable ‘free period’ within which to start assessing.

"I’m going to wait until half term so that I have the time to get it done"

Female, 34, dual play intender, Birmingham

We characterised the second of these as ‘Procrastinators’, who typically were further away from the tipping point and most inclined in the sample to put off the start point for assessment.

"There are so many other priorities. I keep hoping that [current provider] will sort it out, to be honest"

Male, 47, mobile intender, Peterborough
As the diagram below shows, the average length of time from engagement to assessment among Slow Starters was 13 days and was 16 days among Procrastinators.

**Figure 7: Average length of time from Engage to Assess**

![Diagram showing average length of time from Engage to Assess](image)

What should also be noted in Figure 7 above is the proportion of the sample (58%)<sup>8</sup> who claimed, at the outset, to have an acute need and an assumption that they would progress quickly through their switching journey. As will be shown in next section, this proportion reduces significantly as the process of assessment and decision-making is found to be more time-consuming and complex than anticipated, with many/some of these then delaying their assessment.

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<sup>8</sup> Caution: %’s used in the above are descriptions of the sample in this study and should not be interpreted conclusively as actual incidence levels in the relevant markets.
### 3.3.4 Summary of engagement drivers by sector / market

Figure 8 below provides a summary of the key engagement drivers split out by market. As can be seen, some of the drivers are common across all markets. Other drivers are more market-specific. Each of these is then discussed in detail beneath Figure 8.

**Figure 8: Summary of key engagement drivers**

<table>
<thead>
<tr>
<th>Key Drivers:</th>
<th>Fixed Landline</th>
<th>Fixed Broadband</th>
<th>Mobile</th>
<th>Pay TV</th>
</tr>
</thead>
<tbody>
<tr>
<td>Demand for a better, enhanced or different service</td>
<td>None evident</td>
<td>Increases in home working</td>
<td>Increased internet use / access (streaming)</td>
<td>Desire for more / different channels</td>
</tr>
<tr>
<td>Deteriorating service delivery</td>
<td>Occasional line faults</td>
<td>Slow speed</td>
<td>Data allowance overages</td>
<td></td>
</tr>
<tr>
<td>Price increase / Poor perceived Value for Money</td>
<td>Variable call costs</td>
<td>Resentment that they are paying ‘over the odds’ / being ripped off</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Better deal offered by current provider to new customers only</td>
<td>‘Brand new customers only’</td>
<td>‘Brand new customers only’ offers from Current Provider</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Better deal available from new provider</td>
<td></td>
<td>Belief that can get ‘better for less’ elsewhere</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Poor customer service</td>
<td></td>
<td>Foreign call centres, call queuing, wait times</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Demand for a better, enhanced or different service

Demand for a better, enhanced or different service tended to relate to a change in circumstances and / or the demand for more choice and better performance. This engagement driver was largely absent for fixed landlines but was strongly evident in the fixed broadband, mobile and pay TV markets. A common example was increased mobile and TV internet usage for streaming applications and the associated demand for faster download speeds. Another common example was an increased demand in a multiple person household for bandwidth given increased use and proliferation of data and bandwidth-hungry devices. Finally, some participants in the sample were driven to engage in order to benefit from new and better technology, e.g., access to 4G in the mobile market and access to fibre optic in the fixed broadband market.

“Faster internet is coming into our area, so it’s a good time to take a look at what you can get”

Male, 32, standalone broadband intender, Manchester
“My son’s just got a [games console] and now it’s suddenly too slow”
Male, 42, dual play intender, Edinburgh

Service not meeting needs:
The most common example of a service not meeting needs related to broadband speed. Greater and more frequent demands for bandwidth tended to lead to a noticeable and increasing frustration with speed deficits and ‘buffering’, along with an increasing awareness of poor access to mobile high speed internet (i.e., 3G and 4G signal coverage). Slow speed for fixed internet access (in the fixed broadband market) was a major driver for engagement across the sample. These frustrations, to some extent driven by the increase in demand, often led to a rising sense of poor value for money (VFM) for their current service (see below).

“It’s slow for what we now need”
Male, 33, standalone broadband intender, Birmingham

Price increases and poor (perceived) value for money:
Price increases and perceptions of poor VFM were a major engagement driver in the fixed broadband, mobile and pay TV markets. This tended to be triggered more by sight and knowledge of cheaper deals elsewhere than by an isolated increase in the cost of their current service. As such, the sense was of resentment at being locked into an extended contract at a cost that was either actually or perceived to be higher than what was considered to be the ‘going rate’. Typically, this ‘going rate’, was picked up on through sight of offers and deals in the media, word of mouth via friends, colleagues or relatives and, in many cases, consumer watchdogs such as Which? or Moneysavingexpert. In the main, most participants in the sample claimed that it was relatively easy to find and hear about alternative price-led deals, given heavy promotional activity in the press, broadcast media and online.

“I saw this item in the Martin Lewis email alert. It said ‘Can you halve your mobile bill?’ and that got me going!”
Female, 27, mobile intender, London

“My friend’s got the same phone as me and gets unlimited minutes, text and more data for about £10 a month less than I pay”
Female, 24, mobile intender, Belfast

“Saw an ad yesterday offering [fixed] broadband for £2.99 a month. It makes you realise how much you’re being ripped off”
Male, 33, dual play intender, Glasgow

This heavy emphasis on price-led activity tended to create a set of deeply held beliefs (rational or otherwise) . . .

- In the certainty of being able to get ‘more for less’
- That not shopping around meant that they were paying over the odds
- That current providers relied on their complacency and inertia.
Switc{
}hing Communications Provider: The Consumer Experience

“
My friends tell me I’m paying too much. You get to
the point where you feel that you’re a mug if you don’t shop around”
Male, 44, standalone landline intender, Manchester

“There’s no reward for loyalty anymore”
Male, 58, triple play intender, Portsmouth

These beliefs tended to be compounded in many cases by sight of offers and deals from their
current provider that were available to new customers only. This could be a particular spur to
engagement given an added sense of resentment that their current provider was in some sense
failing to reward them for their loyalty.

“They seem to be offering good deals for new customers but not for present customers. This is
really unfair as I think we paid too much and they could offer us the same deal”
Female, 67, standalone landline intender, Cardiff

“I received a flyer today from [current provider] and I was annoyed with the prices they are
offering new customers. They couldn’t be bothered to see that I’m their current customer”
Female, 42, dual play intender, Glasgow

Poor perceived VFM was particularly evident in the standalone fixed landline market. The key
drivers related strongly to price and the variability and unpredictability of billing, given the open-
ended nature of calling tariffs and the perceived relative high cost of certain number ranges
(particularly 0845). Some were more strongly dependent on a landline phone than others. Those
that were most dependent were typically using a landline for international calling and tended to
be more price-sensitive.

Others were much less dependent on a landline phone and, whilst felt to be important to have,
tended to regard the service as poor value for money given low use and the fixed (and increasing
rather than reducing) cost of the line rental.

“I don’t understand why the line rental is fixed. It means
you are paying for a service when you don’t use it”
Female, 47, standalone landline intender, Peterborough

“I’ve read that the line rental is going up. Why? What do we get for it?”
Male, 37, standalone landline intender, London

Poor customer service: 
Finally, a contributing factor in all of the above tended to be poor customer service. Many in the
sample were inclined, in the first instance, to seek to resolve their needs with the current provider.
Difficulty in getting through, and in particular, difficulty in getting problems resolved quickly and
efficiently, was a key trigger to engage with the market and seek an alternative solution.

Poor customer service experiences related to the time and effort required via call queuing, wait
times, difficulty in being understood and ‘scripted’ responses from agents (typically via call centres
perceived to be located outside the UK), leading to a sense of impersonal treatment.
Poor customer service tended to vary across the different providers represented in the study, with some providers offering greater consistency than others in the quality and speed of response. This is supported by Ofcom’s annual Quality of Customer Service report\(^9\) which compares satisfaction with customer service across providers in each market.

There was considerable variation within the same provider, with some customers in the sample rating the same provider as positive and others rating it poorly.

3.3.5 Life-stage and affordability factors

The key engagement drivers identified above varied significantly in strength and type across different life-stages. Broadly speaking, the main differences were between younger, single people, family (multiple-person households) and older post family and retirees. These differences relate, in the main, to technology usage, affordability and needs / expectations regarding customer service. Further detail on differences by life-stage are set out below.

**Younger, single respondents**

Typically, younger respondents in the sample had a higher than average demand for mobile internet access, including messaging and video streaming, and a lower than average demand for traditional pay TV services and fixed broadband. Given lower than average disposable income in this group, price-sensitivity tended to be higher, but combined with a higher than average demand for internet data and new (high premium) mobile technology.

> “Keen to move to 4G so I can get rid of my [fixed] broadband”
> Female, 25, Mobile intender, Portsmouth

> “Watching more stuff on the internet”
> Male, 24, standalone broadband intender, Glasgow

**Family and multiple-person households**

Families, particularly with teenage children, and other multiple-person households tended to make more intensive use of a wider range of connected devices (smartphones, tablets, set-top boxes, games consoles). This gave rise to a stronger demand for service reliability and speed in mobile, fixed internet and pay TV, together with higher expectations of service performance.

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Demand for broadband service reliability and speed was particularly strong among teenagers in multiple-person households accompanied by an exceptionally low tolerance of service downtime. In addition, multiple-person households had a significantly higher than average reliance on and usage of both traditional and internet-based pay TV, with a greater demand for channel choice, particularly for sports and film. Intense, multiple device usage tended to mean higher than average expenditure on communication services with pressure on affordability and greater price-sensitivity evident in lower-income households.

“I’ve got two boys and they’re big gamers. Always complaining that it’s too slow and crashing”
Male, 43, triple play intender, Birmingham

“My wife started working from home and so we both need a faster, more reliable connection”
Male, 42, dual play intender, Manchester

“It’s fine for me, I’m being nagged by my kids to do something about it”
Male, 46, triple play intender, Edinburgh

Older, post-family and retirees

Older participants in the sample (particularly retirees) had a lower than average demand for internet services. By the same token, the importance of pay TV tended to be higher. Typically, the oldest of the participants in the sample were less technology-savvy, made less frequent, narrower and more functional use of devices and, in many cases, relied on others for internet access. This group made higher than average use of a fixed landline phone, with price-sensitivity and frustration with the price (vis-à-vis the line rental) being particularly evident among older respondents with low, fixed incomes. In addition, participants in an older generation claimed to have higher expectations with regard to customer service, with a stronger reliance on / preference for more traditional channels (i.e., phone, face-to-face). By the same token, this group tended to be most vocal about offshore call centres and the claimed difficulties in getting personal attention.

“The [landline] phone costs are much too high. I think I’m being taken for a ride”
Female, 67, standalone landline intender, Cardiff

“Getting through when there’s a problem is my biggest bugbear. You wait and wait and then speak to someone in India who doesn’t understand me. Drives me mad”
Male, 73, dual play intender, Belfast
3.3.6 Key concerns that influence how they proceed to the next stage

Despite the strength of the engagement drivers (identified and described in Section 3.3.4), a range of concerns were expressed about the prospects of success in switching.

A major element of this concern related to levels of reliance and dependence on service continuity and the fear of gaps in service provision during the changeover. Allied to this were fears and risks of the ‘unknown’, i.e., an inability or low confidence to understand ‘technically’ what it is that they were buying or (even if more technically knowledgeable), an inability to determine the actual quality of service provision before taking up a new contract.

This lack of confidence, knowledge and predictability was particularly evident in the fixed broadband market, regarding actual broadband speed, and also in the mobile market in terms of the reliability of signal coverage. Without the certainty of knowing what the actual performance level would be, there was the perceived risk of losing more than gaining from the switch.

Other concerns related to costs incurred via billing overlaps, with the worry that the current service would continue after the new service had begun. Few in the sample were either aware of, or reassured by, cooling off periods given the expected ‘hassle’ and effort required to un-do the decision to switch and ensure that the original service was reinstated and the new service was properly cancelled.

“I need to switch, but it’s the fear of being without the internet. I couldn’t cope without it”
Female, 29, standalone broadband intender, London

“I’m 9 out of 10 certain I want to switch but 3 out of 10 that I’ll succeed. It’s the time and hassle to shop around, queuing on calls to India. And then there’s more hassle and calls if something goes wrong”
Female, 27, mobile intender, Manchester

“It’s stressful. You have to be sure that what you get elsewhere is definitely better, I don’t think it will be easy to be sure”
Male, 42, dual play intender, Portsmouth

“The proof of the pudding’s in the eating. If a new provider promises doesn’t live up to it, then, oh my goodness, the hassle to get the old service back, to cancel it, all the calls”
Female, 30, triple play intender, London

These concerns tended to create uncertainty and nervousness about going through the process of changing provider. Uncertainty and nervousness was evident, given the perceived consequences of making the wrong decision (or making a bad decision) and becoming locked into a contract.

In all, perceptions of risk in switching communications services appear to be high and widespread. Broadly, perceptions of risk in switching communications services appear to be higher and more developed than in other markets (e.g., general insurance, energy).
The evidence above suggests three main factors that contribute to this perceived risk / perception:

- The ‘technical’ nature of the communications market, services and typically strong reliance on a provider to fix things and ensure service continuity.
- Low perceived reliability of alternative providers (that are possible to switch to) in terms of trouble-shooting and responsiveness to complaints.
- Unpredictability of actual service delivery (compounded by conflicting experiences / reviews of others).

  “With energy, you don’t actually change anything. The whole thing continues whilst the billing changes over. With telecoms, there are bits and pieces to change and things can easily go wrong or end up being worse”
  Male, 46, triple play intender, Glasgow

  “The trouble is, you can’t know whether it’ll [internet speed] be better until you’ve signed up. By then, it’s too late, and you’ve got all the hassle of having to un-do everything”
  Male, 52, dual play intender, Brimingham

  “With banks now, they do it all for you, and you get a guarantee. With this, you’ve got to do it all yourself, and then the blame game starts if it all goes wrong”
  Female, 42, dual play intender, London

**3.3.7 Levels of drop out at this stage**

Despite the level of uncertainty expressed, the key engagement drivers described in section 3.3.4 tended to be strong enough to prompt most participants to undertake some degree of assessment. There was a general sense that assessment (as opposed to an actual decision to switch) entailed no great risk in itself. As such very few participants dropped out of the process (or deferred their decision to engage) at this stage.

**Figure 9: Drop out levels at the Engage stage**

![Drop out levels at the Engage stage](image)
Among the minority who did disengage at this stage, two main reasons were evident . . .

- The original reason for wanting to engage in the market was resolved early on by their current provider
- Discovery that they were still in contract, and that a substantial Early Termination Charge (ETC) would apply were they to switch.

Five respondents (two dual-play, two triple-play and one mobile intender) discovered that they were still in contract. The two triple-play intenders claimed that their contracts were extended without their permission and the remaining three participants claimed that they were unaware of their contract end date.

“I was called some time ago, offering me a better deal on my landline. I’ve just found out that this changed the contract for everything from 12 months to 18 months”
Male, 42, triple play intender, Manchester

“We were given [a set-top box] which I now realise has put me into contract for another 12 months. I can only get out of it if I return the box or pay £100. I’m in touch with the Citizens Advice Bureau”
Female, 37, triple play intender, Cardiff

3.4 Assess

This section sets out the findings that relate to assessment, i.e., the point at which, having decided to engage with the market, a customer assesses their options prior to making a decision to switch or stay put. It explores the factors that motivate customers to want to assess before making a decision, the functions that assessment serve, the approach they take, the ease or difficulty they have, the impact that assessment has on their decision to switch or stay, and how they approach this decision in the next stage. We also explore differences across the sample in the level of diligence applied and the effect that technical savviness has. Finally, we examine changes in timing patterns and the level of drop out or deferral during assessment, and the reasons for this.

In summary, the key findings in this section are as follows . . .

- The key motivation to assess is to gain knowledge and confidence in the decision to switch or stay put.

For several participants, it was felt that assessment boosts their confidence to deal with their current provider and potential new providers from a position of strength. This was also felt to help avoid being ‘bamboozled’ by potential new providers or persuaded by their current provider to stay without gain.
The main driving force with assessment for most was to **gain** a better deal or service quality **from their current provider**, to avoid the risk / hassle of switching to a new provider if they could.

In this, many sought information that helped to **empower themselves** with their **current provider**; much more so than with a potential new provider.

Success with empowerment (with either their current provider or a new provider) varied across the services, and is linked to differences in perceived choice and the diligence / savviness required to navigate the communications markets.

- **The more diligent and tech savvy obtained greater certainty and confidence about what they can and cannot get.**

More diligent and tech savvy consumers tended to explore several alternative providers, including smaller/less well-known providers. Others explored their options more fully within the bounds of a limited selection of the largest/most well-known providers.

Those with a more diligent approach to assessment tended to be most likely to gain with **either** their current provider or a new provider. This is explored more in the Act section below.

The least diligent and savvy perceived (at least) there to be a **limited choice** of alternative providers. This led to a comparison of a small number, or in some cases only one other provider and less empowerment and confidence.

- **Many among those who were intending to switch a standalone service (i.e., fixed landline or pay TV), or a triple-play bundle, dropped out at this stage.**

Drop-out among those switching standalone services was driven by stated difficulty finding a provider offering standalone services, and what was thought to be a strong industry focus on bundling.

Drop out among triple play intenders tended to be in multiple person households. These participants said they had difficulties finding a bundle that met the differing needs in the household, i.e., **both** a fast internet connection speed **and** optimum channel choice. This was compounded by the higher perceived risk of getting it wrong.

Drop out was lowest at this stage for those intending to only switch their broadband service, and those intending to switch their mobile. This appears to be due to the comparable ease of making an assessment of these services.

- **Finally, a change in our characterised mind-sets appears to occur at this stage.**

Many of the ‘**Resolute**’ became ‘**Delayed**’, given other unavoidable and unrelated priorities, or found that assessment was more difficult / time-consuming than originally anticipated.
3.4.1 Key drivers, ease and functions of assessment

By the time participants reach this stage, and despite stating an initial desire to change provider, the driving force with assessment among many in the sample was to gain a better deal or service quality from their current provider if they could. This was in order to avoid the risk / hassle of switching. In this, many sought information that helped to empower themselves in discussions with their current provider; much more so than with a potential new provider. Success with empowerment (with either their current provider or a new provider) varied across the services, and was linked to differences in perceived choice and the diligence / savviness required to navigate the communications markets. This is discussed in detail in the Act section.

In the actual process of assessing, the majority of participants reported that it was relatively easy to access information and tools, but that the content was not always straightforward, easy to understand, or easy to use in order to facilitate like-for-like comparisons.

Ease of understanding and comparing varied across the different markets and also across participants according to levels of diligence and technical savviness. Many in the sample were not technically savvy, and despite diligence, claimed to lack confidence in knowing what it was that they were buying.

In this, the most common criticisms, from across all markets, were as follows . . .

- Headline offers, accompanied by conditions and caveats in the ‘small print’
- Complex tariffs, add-ons and introductory offers
- Caveats that reduce the onus of responsibility on the provider to ‘guarantee’ a particular performance level, e.g., ‘Up to’ internet speed claims
- Use of technical jargon, e.g., GB, MB, Mb/s
- Contradictions and variation in reports from different sources (e.g., different review ratings for the same service provider)
- Price and offer variation from the same provider through different channels (i.e., online, in-store and over the telephone)
- An unwillingness on the part of new providers to put their price and service quotes in writing.

Broadly speaking, mobile and dual-play appeared to be the easiest markets to navigate, with many participants claiming that the tariffs were simpler and choices were more straightforward.

Triple-play and particularly standalone services (i.e., fixed landline only, broadband only and pay TV only) tended to be viewed as more complicated. For triple-play, common complaints related to the complexity of bundled options and add-ons, making direct comparison difficult. For standalone services, many complained of particular difficulty in assessing and separating out the specific features of the service as a standalone offering, given a strong focus of providers on packaged bundles.
In terms of approach, most participants started with research online. This was often accompanied by discussion with friends, colleagues and relatives.

Initial online research was felt to be easy and convenient and provided information and tools that helped to create confidence, self-reliance and control. Unless particularly savvy, a major driving force for many participants was to ‘arm’ themselves with knowledge and information prior to contact with providers. The fear otherwise was of being ‘bamboozled’ by alternative providers, or persuaded to stay with their current provider without gain. This said, there were perceived limitations to the internet in terms of assessing specifics that needed clarification and elaboration through dialogue.

Web chat services offered by new providers overcame these limitations to a significant extent but ultimately the tendency was for many to resort to dialogue through traditional channels (i.e., telephone and face-to-face in-store). The main reason, cited by participants for this, related to greater understanding through dialogue. Through this, participants felt that they could better determine the detail of what was on offer, together with any conditions or limitations.

The ease or difficulty of comparing on a like-for-like basis varied by market. In general, participants felt that assessment required time, effort and diligence. It could be difficult, without time and effort, to feel confident about knowing what it was that they were buying.

More specifically, there could be particular difficulty in determining what they were gaining or losing, i.e., what the price actually included and excluded and how the offer itself matched or bettered the service they had already.

These difficulties could introduce (or increase) uncertainty and perceived risk leading many to seek dialogue with providers sooner than they anticipated.

“You have to dig deep as to what you’re going to be missing out on or paying extra for”
Female, 48, mobile, Birmingham

“It’s been frustrating online to find out actual costs. There are too many options. Deals that last for six months before going up by varying amounts, cashback, vouchers, small print”
Male, 29, triple play intender, Cardiff

3.4.2 Differences in terms of diligence and tech savviness

Broadly speaking, ‘gaining’ (in terms of better service and better price), from either their current provider or an alternative provider, tended to favour the more diligent and technically savvy.

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10 Diligence, i.e., the degree of time, effort and rigour applied to assessing options, tended to correlate strongly with technical savviness. There were exceptions to this. For example, a few of the most diligent claimed to have limited technical understanding and claimed to be more diligent because of this. A few of the most savvy felt that they knew exactly what they wanted, which could preclude the need for diligence in assessment. For most, greater savviness meant more confidence in knowing how to assess the market fully.
The sample as a whole varied significantly across a spectrum, from low diligence and savviness to high . . .

**Figure 10: Spectrum of diligence and savviness**

<table>
<thead>
<tr>
<th>Low</th>
<th>Moderate</th>
<th>High</th>
</tr>
</thead>
<tbody>
<tr>
<td>Perceive there to be less choice than there actually is</td>
<td>Explore choice fully within a limited selection of main players</td>
<td>High certainty about what they can and cannot get</td>
</tr>
</tbody>
</table>

Differences along this spectrum had implications for the ‘success’ that consumers had in determining what choices were actually available (as opposed to a perception of what was available). These differences are described in the sections that follow.

**High diligence / savviness**

Participants who demonstrated a high level of diligence were a minority in the sample. Typically, they were time-rich (mainly among those who were not working, or working part time) or resolute enough to make time. All claimed to be comfortable in conducting most of their research online, and were systematic in drawing out detailed comparisons of products and services. Many were prepared to read the ‘small print’ to check on any caveats and conditions, to cross-reference their assessment with other sources of information (e.g., independent reviews, forums, consumer watchdogs, speed-checkers, etc., plus interaction with new providers) and to include the full range of smaller brands of new providers in their review.

Some of the most diligent used spreadsheets to draw up specific details of features, add-ons and exclusions in columns. Some worked on paper with coloured pens. This level of diligence tended to ensure a high degree of certainty about what was and wasn’t possible to gain.

**Moderate diligence / savviness**

Participants who demonstrated a moderate level of diligence were the majority in the sample. Typically, these participants were often time-poor, but were prepared to make a reasonable effort to assess the market. Some were more disciplined than others in setting aside time or diarising for a period when they knew they were free.

In general, the tendency was for many to be uncertain, hesitant and cautious given some distrust of headline offers. Many could easily be put off by detail and particularly by small print and sought more comfort and reassurance by assessing the main provider brands only and drawing on the experience of friends, colleagues and relatives. This, in effect, allowed them to take more of what was actually being offered ‘on trust’, and to avoid smaller provider brands given their perceived lack of status and reputation in the market.
The general preference was to conduct research online. Many were using price comparison sites as their main point of reference, in particular for pricing. This more moderate level of diligence tended to mean that choice was explored more fully within the bounds of a limited selection of main providers.

**Low diligence / savviness**

Typically, participants who demonstrated low diligence were time-poor, with a number of competing priorities. This group were most inclined to procrastinate, given relatively low confidence, experience and knowledge of how best to assess the market. These participants expressed most difficulty with technical jargon and were relatively easily daunted by detail and small print.

These low diligence / less savvy participants were, because of this, most inclined to seek dialogue with their current provider in the first instance in an attempt to satisfy their need or resolve the problem they had.

Failing this, the tendency was to conduct a relatively superficial search online, focusing on main players and headline offers, with little, if any, use of research tools and other information sources (such as independent reviews).

Many in this low diligence group were inclined to ‘give up’ quite easily if no alternative acceptable offer or gain really stood out. For this reason, the outcome was most often a perception that choice was limited. Many were left with a perception that the risk and effort of continuing would not provide them with a gain and so returned to their current provider to either attempt to gain a better solution or deal, or (reluctantly) accept the service as it stood.

**3.4.3 Difficulties experienced during assessment**

Following consumers’ assessment of the markets, regardless of the degree of diligence applied, there were aspects they found difficult, and in some cases this linked to a perceived lack of choice and sources of comparable information. These instances tended to be in the following markets and contexts . . .

- Lack of comparable information on service levels and options for mainly combined fixed broadband and internet-based pay TV in rural and non-cable / fibre areas
- Difficulty in finding comparative information on standalone providers in the fixed landline and pay TV markets
- Narrow pricing differentials in the fixed landline, broadband and particularly mobile markets, and difficulty therefore in finding a saving.

These difficulties were added to by *preconceptions* of there being a limited choice, among the less diligent and technically savvy. This often led to a limited assessment of the market, and early interaction with their current provider, in an attempt to re-negotiate a better deal or solution.
3.4.4 Detailed choice and assessment by service

This section covers the specifics that relate to choice and assessment issues for each market. The section is split into three parts: those seeking to switch a standalone service, i.e., pay TV only, landline only or broadband only, those seeking to switch a bundled service, i.e., dual-play or triple play, and those seeking to switch to a different mobile network operator.

3.4.4.1 Standalone options

Standalone fixed landline intenders

All participants who intended to switch only their fixed landline claimed that they wished to do so for cost reasons. These participants tended to make a higher than average use of their landline. In some cases, higher use stemmed from the need to make relatively frequent international calls. As such, these intenders claimed to be focused in particular on aspects of call and line rental costs in their assessment.

Some in this group did not have fixed broadband. Those that did, claimed to be happy with the fixed broadband element of their service, price-wise, and unhappy with the landline rental and call costs in particular.

“I make a lot of calls abroad and the costs are ridiculous”
Male, 56, standalone landline intender, Belfast

“The broadband is cheap but the landline calls and rental is dear”
Male, 42, dual play intender, Peterborough

Initial assessment led to a change in intention among the majority of those originally seeking to switch only their landline provider. Most of these participants changed their intention to seeking either a dual or triple-play solution. There were various reasons for this, as follows . . .

- Difficulty in finding a standalone offering, with many reporting that landline services were almost always bundled with fixed broadband
- Changing the landline only impacted on the cost and use of other services e.g. the fixed broadband service for those with a dual or triple-play bundle
- Landline call costs appeared to be cheaper when in a bundled dual or triple-play offering (albeit that the landline rental cost remained largely the same).

Those without fixed broadband tended to drop out at this stage and either attempted to gain a better solution or deal with their current provider, or (reluctantly) accepted the service as it stood. The decision to stick was largely because they did not want to take up a broadband service.

Most of those who already had fixed broadband decided to focus on assessing dual or triple-play options when it was possible to do so, i.e., when coming out of contract, or close to coming out of contract with their provider for each of these services. For some this meant delaying their journey because while their landline was out of contract this was not the case for their fixed broadband service.
Overall, among the participants who changed their switching intentions, the relative ease of finding bundles to compare tended to act as a spur to continue and so there was little drop out among these dual and triple-play intenders at this stage.

“It’s hard work finding landline and broadband deals to choose from”
Male, 44, standalone landline intender, Manchester

“I’ve just looked at the deals and it looks as if I’d be better off changing my broadband and landline and maybe my TV as well”
Female, 42, standalone landline intender, Portsmouth

“Why can’t I just put my landline with company X and my broadband with company Y? I can have separate energy companies. Why not separate telecoms?”
Female, 53, standalone landline intender, Peterborough

**Standalone pay TV intenders**

Pay TV intenders were driven mainly by the desire to change or improve their channel choice and/or to reduce the cost of the channel package they had with their current provider. As such, most were focussed on channel choice and pricing in their assessment.

A similar pattern (to those seeking to switch only their landline above) was evident among those initially seeking to only switch their pay TV provider. This was claimed to be due to difficulty in finding comparative information on standalone pay TV providers.

About half of these pay TV intenders decided not to switch, given no wish to switch or take up a fixed broadband service or to switch or take up a landline service. The remaining half changed their focus from making an assessment of pay TV only to that of dual or triple play bundles.

The pay TV only intenders that dropped out at this stage did so because they were relatively happy with their current fixed broadband service and despite some assessment of the alternatives, had reservations about the quality of alternative fixed broadband providers and services. This was particularly the case for participants who were currently with a cable provider. This was felt to be frustrating because the two main motivations for switching to a different pay TV provider was cost and channel choice, which gave rise to a feeling of being ‘locked in’.

“It’s hard work to compare TV on its own. All the providers are offering packages”
Male, 44, standalone pay TV intender, London

“I’ve got a good deal for my broadband and don’t want to change that”
Male, 32, standalone pay TV intender, Edinburgh

“There’s not much choice really. The company I’m looking at is better for channels but poor for broadband”
Female, 38, standalone pay TV intender, London
Those whose assessment found options for better or at least the same level of fixed broadband service (and those who were not in need of a particularly fast fixed broadband connection) claimed to be happy to continue with their assessment of dual or triple-play bundles, particularly, for those not currently bundling their TV service, given the discovered cost and convenience benefits of aggregation.

“It’s easier to deal with my current broadband provider who can offer me a better deal for TV”
Male, 35, standalone pay TV intender, Belfast

“I’m finding that I can get a better deal if I put it all with one provider”
Female, 41, standalone pay TV intender, Birmingham

“There’s really only one provider that offers the package I want, so looking at the deal is quite simple”
Female, 28, standalone pay TV intender, London

**Standalone fixed broadband intenders**

Participants seeking to switch only their fixed broadband service tended to be driven to do so because of poor speed, poor reliability and / or perceived high cost (in relation to deals elsewhere and, in some instances, deals offered by their current provider to new customers only). As such, most were focused on speed and pricing during their assessment.

The pricing of standalone fixed broadband and speed estimates were claimed by many to be relatively easy to assess and compare.

As mentioned above, the main reason for wanting to switch was to get a faster and more reliable connection. As such, the main focus and difficulty among these intenders was determining actual speeds they could get. A consistent complaint was that providers were unwilling or unable to quote this. Instead, an ‘up to’ speed estimate was given which was not widely viewed as a useful or sufficiently certain indicator.

“If we change, are we going to receive any better service? They say what the speed goes up to, but that’s not saying anything”
Male, 50, standalone broadband intender, Manchester

“Impossible to know what the speed will be before we sign up. That’s not very reassuring”
Male, 32, standalone broadband intender, Cardiff

A further difficulty was in finding a faster speed, unless in a fibre optic area. Many who did speed checks were disappointed with the range of speeds that others around them were getting. These participants were normally in rural or semi-rural areas. Where fibre optic was available, the tendency among some was to regard it as too expensive

“Finding it hard to improve the speed without a substantial price increase”
Male, 48, standalone broadband intender, Glasgow
“No real difficulty. It’s easy to choose because price is the main issue, but I’m unable to find a better speed at a decent price”
Male, 33, standalone broadband intender, Cardiff

“They speak a technical language, making it hard to evaluate. Trying to push [fibre optic] onto me, which is too expensive”
Female, 48, standalone broadband intender, Manchester

Among many, who were only intending to switch their fixed broadband provider, some resentment was expressed about having to take up fixed line with their broadband service, given that they made little or no use of a landline telephone service. This resentment related to an additional landline rental cost (that was largely fixed across all broadband providers). Participants reported that considerable effort and diligence was needed to find a lower line rental cost, or a fixed broadband service without line rental.

There was also some resentment about headline pricing for the broadband component and the landline rental cost being shown in the ‘small print’.

“Annoying to have to pay for the landline when you don’t use it”
Female, 34, standalone broadband intender, Birmingham

“The broadband deals are really cheap until you discover that the line rental is not included”
Male, 42, standalone broadband intender, Manchester

“Why is the line rental the same for all providers?”
Female, 34, standalone broadband intender, Birmingham

“I’ve not used a landline phone in about 7 years. But, apparently, I’m better off getting a landline even though I don’t want one. The cost was £39.44 a month without a phone and £33 with a phone for the first six months before changing to £43.99. This makes it more expensive to have the phone line installed after 6 months. I don’t get it”
Male, 42, standalone broadband intender, Manchester
3.4.4.2 Bundled options

Dual-play intenders

As with broadband only intenders, dual-play intenders were, for the most part, motivated to switch to obtain a faster broadband speed and more reliable connection. Most were also motivated to reduce cost, believing that dual or triple-play bundles offered greater discounts.

All dual-play intenders in the sample were currently with a single provider for their current fixed landline and broadband service. Some also bundled pay TV with these services, and others either did not have pay TV or used an alternative provider. After some initial assessment, three participants changed their intention from an assessment of dual-play options to triple-play to obtain a better deal through aggregation of their pay TV service into a bundle. A further 12 participants wanted to move their dual-play service to their current pay TV provider, thereby creating a triple-play bundle.

The landline element was important to only a few in this segment. Most claimed not to make use of a landline, but felt that it was important to have in case of emergency and / or to receive calls from others (normally older relatives) who were unwilling to call a mobile phone.

“I barely use a landline, but it’s important to have it for emergencies.
Also, my mother won’t ring me on my mobile”
Male, 43, dual play intender, Belfast

“I make a lot of international calls, so I’m looking for a fast internet connection and the best possible deal for calls”
Male, 38, dual play intender, Manchester

For the broadband element, the choice and assessment issues for dual-play intenders were largely similar to those for standalone broadband, i.e., pricing and speed estimates were claimed to be relatively easy to assess and compare, given the range of dual-play offers available, extensive reviews and good tools (e.g., speed checkers). Many complained that actual speeds were difficulty to identify. Those who were also focused on the landline element claimed to find that comparison was more complex, given the need to take account of call costs.

“Easy access to information online – quick and easy.
But, too many different plans for the calls”
Male, 33, dual play intender, Glasgow
Again, as with those seeking to switch only their fixed broadband provider, some dual-play intenders said that finding a better speed was difficult. This was particularly so for those in rural areas. Even in urban areas participants said that finding a better speed could be difficult if cable / fibre optic options were not available. As such, many could find themselves resorting to price as the main reason for switching, i.e., ‘the same for less’, rather than ‘more for less’. This meant that drop out was relatively low at this stage, given the relative ease of finding lower cost alternatives. Few in the sample were motivated to pay more for fibre optic when it was available in their area, with many regarding it as too expensive and some feeling that it was superfluous to need.

“Disappointing that the speed they advertise is an up to speed and they can’t give the minimum number. The agent was reluctant to convince me that their minimum speed is higher than other providers”
Male, 27, dual play intender, London

“No speed increase possible”
Male, 48, dual play intender, Cardiff

In addition, customer reviews, referred to by the more diligent, could be conflicting, which added to the sense of uncertainty and perception that speed is not possible to guarantee. Conversely, some would talk to friends in the area and neighbours, to find that they were not getting a speed with different providers that was appreciably better than with their current provider, which led to them taking an immediate decision to drop-out.

The lack of choice (in terms of high speed alternatives) and lack of certainty about actual speeds was often compounded among the less diligent in the sample given a reluctance to assess smaller, less well known providers.

**Triple-play intenders**

All triple play intenders had an intention to switch their package and services to a different triple play provider. None changed this intention during their assessment. The main reasons for wanting to switch were price and channel choice related; with many feeling that their current package offered poor value for money.

Reasons given for wanting to switch to an alternative triple-play package provider were as follows:

- The desire to maintain (and improve on) the cost and convenience of aggregation, i.e., a bigger package discount
- Avoidance of additional hassle, time and difficulty in assessing individual providers and components
- Perceived relative ease of finding and comparing packaged bundles
- Perceived ease of timing and coordinating the switch, i.e., one provider, as opposed to multiple providers, to have to deal with.
Despite it being widely perceived to be simpler to switch their entire package from one provider to another, the assessment process for triple play could still be viewed as complicated given the greater number of variables and add-on elements. This number of variables was felt to make like-for-like comparisons difficult, and tended to mean that only the more diligent achieved a comprehensive appraisal of what was available.

"I’m looking at many comparisons and formulations to compare for the best package and price. My brain has gone into overload”
Female, 44, triple play intender, Edinburgh

“Flooded with options”
Female, 44, triple play intender, Glasgow

A relatively high level of drop out was evident at this stage, among triple-play intenders, given the strong desire to retain a triple-play bundle, claimed difficulty in finding a solution that suited needs exactly, and a sense of increased risk in terms of ‘getting is wrong’. These ‘barriers’ were particularly evident in multiple-person households, given the often conflicting needs of different people. For example, one member of the household might be in need of a fast internet connection; another has a particular desire for channel choice and is a low-level user of the internet. In addition, given relatively higher demands in multiple person households, and the use of multiple devices, reducing cost (or at least not paying more) was claimed by many to be an important element to consider within the above.

As such finding a solution that offered both high speed broadband and their optimum choice of channels, within a particular budget, was said to be difficult. For these people, triple play was often seen as a ‘bigger decision’ than just switching provider of a single service, with the stakes being higher in terms of getting the package right. This tended to lead to drop out (i.e., staying with their current provider) given the inability to find a single provider meeting all of these needs, and the increased perception of risk.

“I feel disappointed. There’s no one provider that satisfies all of my needs. Not keen to have different providers for different things”
Female, 32, triple play intender, London

“I’m starting to find that I have to consider what I’m losing if I were to switch, rather than what I might gain”
Male, 37, triple play intender, Birmingham

“I could gain a very high internet speed but would lose my sports channels”
Male, 28, triple play intender, Peterborough

“It’s frustrating trying to piece together what deal is best when no one deal offers exactly what I want”
Female, 33, triple play intender, Glasgow
3.4.4.3 Mobile

When assessing mobile, the most typical approach was to first choose a handset (in terms of style, features, look & feel, size / format, ‘brand’ / operating system) and then determine the quality of network coverage. Once settled on these two main attributes, most of the rest of the assessment was focused on the ‘deal’, with the aim to obtain the lowest cost.

The dynamics of assessment in the mobile market tended to be different, compared to the fixed landline, broadband and pay TV markets. Broadly, many claimed to find it relatively easy to navigate the mobile market.

This appeared to be the result of comparatively higher levels of confidence via greater familiarity, savviness and personal engagement with the mobile sector. There were also strong levels of motivation and enthusiasm to get the best outcome (i.e., the most desirable handset for the least cost). Finally, many had greater past experience of switching and more immediate access to the switching experiences of others (particularly friends and family members).

Many claimed that it was easy to find and compare information via network operator sites, comparison sites, in-store experience and advice, online reviews and forums, and the experiences of friends and family. This said, the extent to which participants assessed and determined the actual overall cost varied. Typically, the less diligent and savvy tended to focus on headline figures (i.e., the monthly payment) accompanied by a basic assessment of voice, text and data allowances, plus the upfront cost of the handset.

The more diligent and savvy tended to look beyond the headline figure, taking account of introductory discounts, contract length, and any operator or non-operator-related offers, e.g., vouchers, cashback, free introductory subscriptions, etc. The main difficulty, across most of the sample, was being able to determine actual needs for data, along with concerns about exceeding their allowance (in cases where providers capped usage). This prompted a widespread desire to seek out unlimited offers which, whilst claimed to be easy to find, could be found by many to be unaffordable. It was, by the same token, claimed to be less easy to find information on actual needs for data.

Broadly, the main outcome of this was a tendency for the less savvy and diligent to be unwilling or unable to assess the market fully, with some drop out and a stronger tendency to revert to their current provider earlier in the process, either to attempt to negotiate a better service or deal, or to accept the existing service as it stood. The more savvy and diligent on the other hand either felt more confident in their assessment to move on to making a decision to switch or negotiate with their current provider on the basis of what they perceived to be a full and accurate idea of what they could gain elsewhere.

“You have to be wary. The monthly payment jumps out at you, which seems cheap, but they actually cost more when you look at the detail”

Female, 49, mobile intender, Manchester
“You have to factor in the limits. I discovered that a higher monthly payment is actually cheaper, once you look at the detail and do the maths”
Female, 27, mobile intender, Portsmouth

“There’re a lot of companies that are cheaper, but then you have to dig deeper as to what you’re going to be missing out on or paying extra for”
Female, 48, mobile, Birmingham

Some participants in the sample became focused on SIM-only monthly rolling contract deals with their current provider, as a means to delay or defer their decision to switch. SIM-only tended to be seen as a relatively low cost ‘stop-gap’ solution, to remove the perceived risk of making a ‘wrong’ decision (given the lengthy commitment of an extended contract), and / or to ‘buy time’ until a desired handset brand or model became available.

In addition, signing up with their current provider for a SIM-only contract was felt by some to make it ‘easier’ to switch. The assumption in this was that their current provider would be less inclined to persuade them to stay.

“Tides me over until I decide what to do”
Male, 23, mobile intender, Peterborough

“I can’t decide yet, until the new iPhone 6 comes out”
Female, 23, mobile intender, Portsmouth

“My provider won’t be interested in keeping me once I’m on a SIM-only deal. It’ll be less hassle to leave them”
Male, 28, mobile intender, Cardiff

Some in the sample reported very limited success in seeking a SIM-only solution with a new provider unless they were prepared to buy a new handset from this provider. Few claimed to be aware of (or at least few were prepared to consider) methods of unlocking their current handset in order to widen their choice of SIM-only deals.

“I asked [new provider] if I could put a new SIM card into my old phone and they said it wouldn’t work”
Female, 24, mobile intender, Portsmouth

Finally, some drop out at this stage was evident due to perceived limited choice in terms of better network coverage, and for a minority, difficulties among PAYG participants in getting a contract with an alternative provider given problems with credit scoring. A significant number of participants deferred their decision, to coincide with the launch of the iPhone 6, which was launched in September, at the latter end of the fieldwork.

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11 A total of 7 participants deferred because of awareness of the launch of the iPhone 6. Of these, 3 eventually switched network (2 of whom purchased an iPhone 6) and 3 decided not to switch (one upgraded to iPhone 6, one upgraded to a different handset brand, and one did not upgrade their mobile phone, but all remained with their current provider)
3.4.5 Levels of drop out at assessment stage

Overall, significant drop out was evident at this stage, particularly among those intending to switch only their landline or pay TV provider. Drop out was also evident among triple play intenders in multiple person households given claimed difficulties in finding a bundle that suited or resolved the differing needs in the household for both a fast internet connection speed and optimum channel choice. This was compounded by the higher perceived risk of getting it wrong.

**Figure 11: Drop out levels at the assessment stage**

Drop out was lowest at this stage among those who were intending to switch only their broadband provider and those intending to switch their mobile operator. Among those who were intending to switch fixed landline only and pay TV only, the main reasons for drop out were lack of perceived choice. This tended to be a compounded by a relatively high level of diligence required to find a standalone solution in these markets, given what was consistently felt to be a strong industry focus on bundling.

Drop out was lowest at this stage for those intending to switch their broadband only service and those intending to switch their mobile. The main reason was that these services required relatively less diligence to assess, giving rise to a greater perceived choice of potential alternatives.

Deferral was also evident at this stage given a desire to wait until new technology became available. This was related mainly to the mobile market, given that (at the time of this study), the iPhone 6 was on the horizon. It was also evident for fixed broadband intenders who, in their assessment, learned that fibre optic was a possible choice in the future. For many though, no certain date for this was given which meant that deferral changed to drop-out.
### 3.4.6 Timing patterns

Finally, during assessment a change in our characterised mind-sets occurred, as the following Figure shows:

**Figure 12: Average length of time from Engage to Assess and from Assess to Act**

<table>
<thead>
<tr>
<th>Mind-set</th>
<th>Time from Engage to Assess</th>
<th>Time from Assess to Act</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acute, Sudden:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Resolute</td>
<td>2</td>
<td>4</td>
</tr>
<tr>
<td>Resolute delayed</td>
<td>3</td>
<td>24</td>
</tr>
<tr>
<td>Gradual, Increasing:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Slow starters</td>
<td>18%</td>
<td>13</td>
</tr>
<tr>
<td>Procrastinators</td>
<td>24%</td>
<td>16</td>
</tr>
</tbody>
</table>

Many of the participants we classified (according to their responses) as ‘Resolute’ (i.e. 58% of the sample claimed to have an ‘acute need to switch’) delayed their next steps to a time when they could dedicate sufficient resource to this, due to other priorities.

This change resulted in a reduction of the proportion of the sample classified as ‘resolute’ to 14%\(^\text{12}\). This change was largely due to, these consumers finding their initial assessment more difficult or time-consuming than they had anticipated.

“It’s so frustrating, but I’ve got a family matter to deal with before I can get to this”

Male, 47, triple play intender, Peterborough

“There’s more to it than I thought”

Male, 37, dual play intender, Belfast

\(^\text{12}\) Caution: %’s used in the above are descriptions of the sample in this study and should not be interpreted conclusively as actual incidence levels in the relevant markets.
3.5 Act

This section sets out the findings that relate to participants acting, i.e., the point at which, having assessed the market, a customer takes the final steps they consider necessary in order to reach a decision to switch or stay put. It explores the factors that lead to this decision and examines in particular the role that interaction with their current provider plays in this.

In summary, the key findings in this section are as follows . . .

- **Participants at this stage felt confident that they could gain by switching. Most, though, had not made a final decision on whether to switch**

  It is important to note that not all participants were undecided at this stage. A minority made a decision very quickly and, in effect, went straight from assessment, to complete. These participants were the most resolute and determined to switch, and having largely made their decision to do so during their assessment, had no wish to negotiate with their current provider. In some cases, their decision was made at the very outset (with assessment serving to support their decision).

  For the majority, rather than a step taken after assessment, this stage can be classified as a continuation of assessment. It centres around participants finding out what gains might be available from their current provider, before making their final decision.

  For these participants, who were still undecided, most had at least some level of confidence that they could gain by either switching or notifying their current provider that they were ‘thinking of’ switching.

  As such, ‘Act’ amounted to a process of weighing up the effort and risk of changing to a new provider, versus the likelihood of success in negotiating a comparable or better deal with their current provider (in order to avoid the effort and risk of changing). For many, a more developed discussion with their current provider was viewed as beneficial (and potentially fruitful) before making a final decision.

- **Most of these participants had not sought to negotiate with their current provider during their assessment.**

  Some contacted their current provider early on in their assessment, mainly to check on whether they were out of contract, but deferred negotiation until after they had assessed their options (chiefly as a means to empower themselves).
• Once this was done, most sought to negotiate prior to their final decision and claimed that they saw benefit in doing so.

This behaviour was driven by their desire to gain (if they could) without switching. In this way, the stated intention among the majority was to use their new-found confidence (through assessment) to seek an offer from their current provider if they could, rather than switch. In short, the stated aim was to get from their current provider what they could gain elsewhere, without the perceived hassle and risk of switching.

• Some were more successful with negotiations than others, with success driven by a combination of factors.

These factors were: the range of alternative providers and options established during assessment, the perceived level of gain that could be achieved elsewhere, and the willingness of their current provider to respond to their needs.

In this, participants were more or less empowered to negotiate with their current provider: Some felt that they had a good range of alternative providers to choose from and could gain substantially elsewhere. This was felt to give them the most amount of ‘leverage’ over their current provider, resulting in an offer they accepted, and were pleased with.

Others who were much less empowered became ‘resigned’ to staying with their current provider, without gain (or with only limited gain) given their stated difficulties in finding alternative providers and options elsewhere and (normally related to this) a disappointing response from their current provider.

• There was a large amount of drop-out at this stage, due to successful negotiations with their current provider.

Many who dropped out succeeded to gain sufficiently from their current provider and, in turn, perceived that new providers could not offer them sufficient gain to compensate for the hassle and risk of switching.

A minority felt the offer from their current provider was insufficient and that the gain they could make elsewhere was worth the perceived effort/risk and so moved onto ‘complete’, along with those who made their decision to switch during their assessment.
3.5.1 Key mind-sets and motivations to act

As noted in the previous section, assessment caused a fair amount of ‘drop-out’. Those motivated to continue on to this stage were at a point where they felt sufficiently confident that they could get a better service or deal from an alternative provider, or could negotiate a better service or deal from their current provider.

Broadly, three main groups emerged at this stage: the ‘Resigned’, the ‘Opportunistic’ and the ‘Resolute’. These groups are discussed in detail in the follow sub-sections.

In summary, the Resigned were the least confident and felt, from their assessment, that they had limited choice of alternative providers and options to be able to switch and gain, and were therefore more strongly inclined to try to negotiate a better deal or solution with their current provider.

The Opportunistic felt that they had sufficient choice (in terms of alternative providers and options) to switch, but wanted contact with their current provider, prior to making a final decision, to attempt to negotiate a better deal or solution, in order to avoid the ‘hassle’ and risk of switching. Many felt that it was possible to ‘have their cake and eat it’ by getting from their current provider what they felt they could get elsewhere, without the hassle and risk of switching.

Finally, the Resolute (by definition) appeared to be most determined to switch and, in many cases, sought to avoid contact with their current provider as much as possible. This group made a decision very quickly and, in effect, went straight from assessment to completion of their switch. In some cases, the decision was made at the very outset (with assessment serving to support their decision).

For the majority, rather than a step taken after assessment, this stage can be classified as a continuation of assessment. It centres around participants finding out what gains might be available from their current provider, before making their final decision.

It is clear, from the above, that the great majority of participants wanted interaction with their current provider prior to making a final decision on whether to switch or not.

Their reasons for this varied in relation to the level of confidence, empowerment and determination that participants had in wanting to switch. This in large part, was determined by the level of choice (of alternative providers and options) and gain they had identified in their assessment.
3.5.1.1 Key mind-sets and motivations to act - in detail

In detail, three different states of mind emerged at this stage prior to participants making a final decision on whether to switch. These were ‘Resigned’, ‘Opportunistic’ and ‘Resolute’ . . .

**Figure 13: States of mind prior to final decision**

These three main groups (above) are described in the following sub-sections:

‘Resigned’

These participants tended to interact with their current provider after a relatively short period of assessment, having come to the view that their choice (of alternative providers and options) was limited. This was due to low diligence in seeking out alternatives elsewhere, though even with high diligence, many came to the view that their options were limited. This tended to mean having to drop out altogether, but before doing so, many turned to their current provider to attempt to obtain a solution or better deal. This was sometimes done in the belief that they could leverage their loyalty (or even ‘bluff’ a little about their choices elsewhere). Resentment was evident if the current provider was either unwilling or unable to respond, resulting in a feeling of disempowerment and resignation in having to stay put.

In a small number of cases, resentment could be so strong that it prompted radical action, by for example, raising a formal complaint, making repeated calls (in the hope that a different agent would respond more positively), and even in one instance cancelling and then re-applying as a new customer in their partner’s name.

“I wasn’t offered anything to stay – they just said ‘ok, off you go’”

Female, 57, dual play intender, Birmingham

“It’s frustrating, I thought I had enough to convince [current provider] to make them improve on their offer, but they weren’t budging”

Male, 27, mobile intender, London

“I am so angry about this that I’ve decided to cancel and then set up with them again as a new customer, under my partner’s name. It’s the only way to get what new customers are being offered”

Female, 37, triple play intender, Edinburgh
‘Opportunistic’

These participants tended to interact with their current provider after a fairly developed period of assessment, having come to the view that their choice (of alternative providers and options) was relatively good.

These participants had conducted their assessment with a reasonable degree of diligence (or found that it was relatively easy to gain elsewhere). This tended to empower them to be able to act opportunistically, in the knowledge that they could successfully ‘play off’ one provider against another, stating that their deliberate aim was to obtain a better solution or deal from their current provider than might otherwise be the case. Specifically, the stated aim for many was to get from their current provider what they could get elsewhere, without the perceived or actual hassle and risk of switching, with the confidence that they could ultimately leave if the current provider was unwilling to respond.

“One I did my research, I contacted [current provider]. It’s amazing how generous they are at this stage!”
Female, 27, mobile intender, London

“It was only when I said I was thinking of leaving that they started to take an interest. Suddenly, they were listening to what I wanted. They seem to have a higher calibre of staff once you’re determined to leave – more authority to offer better deals”
Male, 41, dual play intender, Glasgow

‘Resolute’

Typically, these participants were technically savvy and diligent, with a stronger and more acute stated need / determination to switch. In their assessment, many claimed that they were able to find a good range of alternative providers and options and, because of that, felt empowered.

Some sought to avoid or even minimise their interaction with their current provider, by either setting up with a new provider before notifying their current provider, or, finding (with the GPL NoT process) that they could leave it to the new provider to cancel on their behalf. Most though, felt that they needed to contact their current provider, to obtain reassurance and to minimise any potential risks, e.g., to ensure that their contract was properly cancelled and that no penalty would be incurred. Of course, in the mobile market, those who wanted to retain their number had to contact their provider to obtain a PAC code.

“Nothing on earth would have persuaded me to stay with [current provider]. They could have offered me free TV, broadband and phone for the rest of my life and I still wouldn’t have accepted”
Female, 28, triple play intender, London
3.5.2 Case study examples\textsuperscript{13}

**George – Resolute, empowered**

The following is a copy of the transcript from a web chat with [current provider]. This participant was originally looking to keep his TV service and just replace his landline phone and fixed broadband, but then decided to change his entire (triple) package. Despite the determination (demonstrated in the transcript below), this participant was eventually persuaded to stay with [current provider], via a call-back the next day.

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10:20:31
George:
I would like to advise that I am giving my notice of my intention to cease receiving all services from xxxxxxx as from today the 31st May please. I understand that 30 days’ notice is required and I will require confirmation from [current provider] of the date that my services will cease.

10:21:16
Jenny:
Hi George, I am sorry you want to leave [current provider], was there any particular reason why?

10:22:32
George:
Purely cost related, I am seeking better alternatives and have sorted my own solution using several providers.

10:23:46
Jenny:
Oh I see, have you spoken with [current provider] about bringing cost down? I would love to look into this for you today.

10:26:50
George:
I contacted [current provider] a few days back and went through the alternative costs, mixing of services, reducing TV options increasing broadband speed etc., but this has proved to be unsatisfactory for me so after due consideration, I am duly giving the 30 days’ notice that you require.

10:28:33
Jenny:
It would be a huge shame to lose you as a customer without having the chance to compare our packages with the new one you have seen. I really would love to try George.

10:30:29
George:
I just came to give my notice. The decision has been made already. Please can you confirm this will be actioned as from today for my 30 days’ notice and the date that I can expect services to cease?

10:32:54
Jenny:
I can take your 30 days’ notice George. I can see you have previously spoken to Debra and discussed a package. This is just one of many that we can offer. I totally appreciate you have been looking around but [current provider] is very competitive. It seems sad to not be able to just compare our packages to your new package. It doesn’t hurt to try if you tell me what services you are getting and provider I can compare like for like. It would only take a moment.

**Continued . . .**

\textsuperscript{13} Please note that names have been changed in all case study transcripts, to preserve anonymity.
10:34:24
George:
Thank you but no. Can you confirm the date that services will cease and when I will pay up until and how I return the equipment that I have if that is required?

10:38:50
Jenny:
Okay George. The account will close on 30th June, we will bill until the 30th then anything extra charged will be refunded to you via cheque 35 days after the account closes. Once the account closes we will send a pre-paid returns pouch so you can send the equipment back to us. I understand it is completely your decision what package you have, it just really is a shame to not even try compare prices/services. What if there is a difference in service/something's not included/is it fibre broadband? You use the broadband a lot with [current provider], up to 77.04Gb per month, other providers give fibre broadband but still rely on the phone line so can affect your speeds. I would just love 1 chance to try compare, I might even beat the price?

10:41:07
George:
Again thanks but no. I look forward to concluding this in the next 30 days and will look out for the pouch to return the equipment. I may well look at [current provider] again on the future. Thank you for your help.

Sharon – Resigned, disempowered

The following is a diary transcript. The participant is currently with [current provider] for her landline and fixed broadband. Having moved to the area a year ago and signed up with [current provider], Sharon was unhappy with the speed for her broadband and now intends to switch. Sharon was eventually persuaded to stay with [current provider], because of limited options elsewhere and despite no immediate improvement to her broadband service.

15th May
I called [current provider] to cancel my services, I spoke to an advisor who told me he had checked and that no other provider could offer a faster broadband in my area and it was due to how far away from the exchange we are. I informed them I still wanted to cancel, he then offered me free broadband for the next 12 months and that I would just continue to pay the line rental, he said that this was a good deal as hopefully the speeds will improve in my area during that time, I accepted the offer with the intention of checking other providers speeds for myself and we ended the call.

15th May
I received an email from [current provider] to confirm that I agreed to renew my phone and broadband for another 12 month contract, I did not want to enter another contract so decided I would call within the next day or so to cancel everything.

19th May
I rang the cancellations department and spoke to a girl, I explained the previous phone call and that I did not agree to another 12 month contract and that I now wished to fully cancel everything. The girl from [current provider] took my account details and told me I couldn’t cancel as I had already agreed. I explained that it does not work well enough in my house and would not be paying it for another year. She was extremely rude and just kept saying that I shouldn’t have agreed then and as it was a re-contract and I had no cooling off period.

Continued . . .
I asked to speak to a line manager or team leader and she said they would not take the call so I asked to speak to another agent and again she refused so as I was getting nowhere and she was so rude I terminated the call.

**21st May**

I rang again on the same number and spoke to a different lady, I explained to her what had happened on the previous call and she was very apologetic and said that it was in fact noted on my account that although the twelve months free was offered and, if I continued to have connection issues, I could cancel with no penalty and if the previous advisor had simply looked she would have seen this! I spoke to her for around 20 minutes and she reassured me that nothing like that would happen again but also that they are in the process of installing fibre optic in my area, so I have decided to have the 12 months free that they offered and just continue to pay the line rental.

I decided to stay with [current provider]. It was mostly because the speed is going to be improved and that when I checked other providers they were all as slow as I am currently getting. I have spoken to neighbours who are all frustrated at the speed we get. Obviously the 12 months free swayed me too but only after the last person I spoke to restored my faith in their customer service.

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**John – Opportunist, empowered**

John wanted to switch his landline, broadband and TV from [current provider] to [new provider] having found that they offered a far better deal. After negotiating with both providers, John finally decided to stay with [current provider].

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**May 1st**

I queried [new provider] on Tuesday about the feasibility of getting their service (I live in a top floor tenement flat) and was assured there would be no issues. Then this morning I received an envelope that was personally addressed to myself containing a “Dear Householder” letter thanking me for my query and giving me my area reps details. I will be completing the order online today.

**May 4th**

I know I was 100% certain to switch but, as the Godfather says, [current provider] made me an offer I couldn’t refuse. Initially, I contacted [new provider] but found their first line agent unhelpful in the extreme so went ahead with the [new provider] sign-up. Here is the transcript chat I had with them:

Wendy: Hi, welcome to [new provider]. How can I help?
John: I am just signing up for your service
Wendy: Would you like to know when you will get your first month bill?
John: am in contract with [current provider] till June 4 so selecting that as install date assume will be after that
Wendy: You can select the installation date that suits you best and your contract will start from the day of installation only and you will get your first month bill within 30 days after the installation.
Wendy: Here’s the page where you can choose the installation option that suits you best.
John: done that up to banking part
Wendy: Please go ahead and put in your correct bank account number, the name your account is in, and your sort code. After putting in your sort code click ‘Find my bank’ so we can get the address automatically.
Wendy: Please, remember to click at the bottom to show that you are the only person authorised to set up a Direct Debit from this account.
John: Box was preselected

Continued . . .
Switching Communications Provider:  The Consumer Experience

Wendy: Great, you’re nearly there! If you’re happy, click ‘Place your order’.
John: done thanks for help
Wendy: That’s it – your order is complete! Next, our team will check your order details and send a confirmation email as soon as possible – keep your eyes peeled for details on what happens next. It normally takes us 48 hours at the most – and in most cases, it’s a lot less time than this.
Wendy: Congratulations!
Wendy: Is there anything else I can help you with?
John: nope you have been great

May 5th
Today I rang [current provider] to give 30 days, to cancel my package. I was passed from a first line agent to a retention agent who made me an offer of my existing package for £33 I declined this as I thought a 100mb connection was worth an extra £10 a month. She passed me onto a cancellation agent who upped the offer to £23 per month for 12 months on a 12 month contract. I had a think about it then called up [new provider] to cancel (I was hoping they would make a counter offer but the agent I spoke to after battling my way through there IVR did not question me when I told him that [current provider] had offered me a better deal and I wanted to cancel my order he merely said okay and cancelled the order then and there. I have to say if they’d taken a further £10 off the price, I would have proceeded with them but he seemed not to care at all. So, I’ve now renewed with [current provider].

May 7th
I just got a call from [new provider] 15 minutes ago, asking why I cancelled and offering me a further £5 off. I explained that I was staying with [current provider] as it was the greatest saving for me.

3.5.3 Assessment of what is gained from staying or switching

In determining what is gained from staying or switching, three key factors appear to be relevant:

- The level of choice elsewhere, i.e., the extent to which an alternative provider can offer the same or better service / deal
- How well / easily the original reason to switch can be resolved by the current provider
- The strength of the offer from an alternative provider.

The assessment is made more complex by a number of secondary factors that have the potential to mediate the impact of one or more of the above . . .

- Confidence / determination to switch (irrespective of whether the gain is significant or not)
- Risk sensitivity (which may be prohibitively high, despite the promise of a significant gain elsewhere)
- Customer service quality, which may reduce or increase a willingness to switch, irrespective of the level gain (service and / or financial) elsewhere.

These secondary factors relate of course to the mind-set of the participant in terms of attitude to risk, past ‘history’ with their current provider, and expectations regarding an ‘acceptable’ or superior level of customer service elsewhere.
Even in situations where there is little gain elsewhere, a participant may still switch if, for example, they have a poor perception of (or poor relationship with) their current provider, or are innately confident enough to overcome the perceived risk of switching. Conversely, in situations where there is significant gain elsewhere, a participant may still stick. This appears to be particularly the case if they are innately risk-averse and their current provider responds positively by, for example, making them feel that their loyalty is valued.

Given these primary and mediating variables, it is not possible to provide a definitive account of what was gained and saved, or to state definitively that current providers offer more or less than alternative providers. By the same token, it is difficult to identify any definitive pattern in terms of differences between alternative providers in terms of what is gained when switching.

At most, the evidence suggests that current providers tend to offer ‘more’ than (or at least the same as) alternative providers, and that this is particularly so in highly competitive situations, i.e., where the customer is more strongly empowered and has significant choice elsewhere.

The tendency for current providers to offer more in order to retain a customer appears to be strongest for multiple products, i.e., dual or triple play, or in other markets when the customer is prepared to accept a longer contract period. In any event, the offer from the current provider was often seen to be more motivating because it took away the perceived hassle and risk of switching.

3.5.4 Levels of drop out at this stage (Act)

Overall, heavy drop out was evident at this stage, particularly among fixed landline broadband and pay TV intenders.

**Figure 14: Drop out levels at the Act stage**

Drop out at this stage was due mainly to successful negotiations with their current provider and the relative difficulty that new providers had in competing with current providers. This was the case given the relatively strong desire on the customers’ part to seek a better solution or deal with their current provider.
Drop out was also driven by the underlying sense of nervousness and uncertainty about the consequences of a switch and therefore the desire to avoid the actual and perceived hassle and risk of switching.

“I got what I wanted, without the hassle of switching. Very happy customer!”
Female, 42, triple play intender, Glasgow

“They made me an offer I couldn’t refuse. It makes a huge difference if you say you’re leaving”
Male, 53, triple play intender, Glasgow

“I was determined to switch, but never expected them to offer me a better deal, that was enough to make me stay put”
Female, 38, dual play intender, London

3.6 Complete

This final section sets out the findings that relate to completion, i.e., the point at which, having assessed the market and made the decision to switch, the transfer of service is made. It investigates the perceived ease and convenience of the different switching processes, i.e., GPL NoT in the fixed landline, dual-play and fixed broadband only markets, number porting via the LPL process in the mobile market, and C&R (Cease & Re-Provide) in the triple-play and pay TV only markets. Finally, we look at levels of drop out during completion and the factors that cause this.

In summary, the key findings in this section are as follows . . .

- Participants reaching this stage felt the gain was sufficient and certain enough to justify switching.

In contrast to the drop-out noted in ‘Act’, the key motivation to ‘Complete’ was that the actual or perceived gain from switching was felt to be sufficient and certain enough to justify the actual or perceived effort and risk of changing to a new provider. As noted above, some of these participants made their decision to switch during (or even before) assessment, and others did so following unsuccessful negotiations with their current provider.

14 This study was designed to understand the experiences of GPL and C&R primarily (except for mobile) due to the imminent requirement for GPL to be adopted for switches on the OpenReach network. As such, participants seeking to switch under the process that required obtaining a MAC code were excluded.
This also included a few who had no contact with the current provider other than to cancel their existing contract.

In the main, interaction with their current provider (among those who had not done so already) was driven purely by a need to minimise risks, and ensure that their contract was cancelled (and that no penalty was payable). For these participants, the decision to switch was made prior to any interaction and there was no interest in seeking to negotiate with their current provider.

- **The ease / convenience of the switch varied by switching process.**

  Typically, participants who were identified to have switched using the GPL NoT process found it a positive experience. Most of those who switched and retained their mobile number using an LPL process did not report any significant problems. Some though complained that having to obtain a code from their current provider made the switch more difficult than it was thought it should be and, in some instances, caused delay and additional time and effort.

  Cease & Re-provide (C&R), where we identified this process to have been used, was seen to be particularly demanding when it involved multiple services.

- **There was a very low level of drop out at this stage. Typically, those in the sample who reached this stage were the most resolute and determined to switch.**

  This was strengthened by the level of perceived choice they had (in terms of alternative providers / options) and a determination to reject or even avoid attempts by their current provider to persuade them to stay.

### 3.6.1 Awareness and impact of different switching processes

Across the sample, the expectation, in all markets, was that the customer would be required to manage the transfer, which suggests participants were not aware of the GPL NoT switching process, which is led by the new provider. Participants assumed they would need to contact their current provider to cancel the service and contact the new provider to set the new service up (or vice versa). Quite a few in the sample were aware that the GPL process applied in other sectors (particularly Banking) but did not consider that this applied to communications services.

In many cases, there was a desire on the part of participants to handle the transfer themselves, given fears that either the current or new provider would mishandle things, leading either to a gap in service provision or a billing overlap.

Even when advised by the new provider that they would handle everything, there was a strong tendency among participants to want to contact their current provider to ensure that the service had been cancelled and that they were properly transferred.
3.6.1.1 GPL NoT switching process

As noted above it was widely considered that the customer was required to cancel their current service, and set up with a new provider. Another mis-conception held among those participants who reached this stage, was the requirement to cancel their service before signing up to a new one.

When they were informed about how a GPL NoT process works in practice (normally via the potential new provider advising them that they would handle the transfer), this received mixed views. Some expressed delight that the transfer would be taken care of, and that they didn’t have to spend time and effort in managing it themselves. Others expressed a concern regarding the certainty of the transfer (without their involvement) and felt some anxiety about their perceived loss of control.

Whether delighted or concerned, many switchers in the sample, still wanted to contact their current provider, to ‘double-check’ that the service had been cancelled at the right time, in order to avoid any risk of a gap in service provision or billing overlap.

This said, when experienced, the GPL process was regarded widely as positive, mainly because of the convenience it offered. This sense suggest that the GPL NoT process may strengthen a decision to switch, but is not a trigger or motivation to switch. Lack of awareness, prior to the decision to switch, was the key factor in this.

“[New provider] sorted it all out with [current provider]. But I still wanted to call [current provider] about the cancellation and contract. [New provider] said that I didn’t need to call them. But I wanted to call, to feel sure that I wasn’t being charged”
Male, 58, dual play intender, Belfast

“[New provider] undertook everything. 100% of the changeover. I have though cancelled my direct debit to [current provider] and informed them. I could see a double-billing debacle looming on the horizon, which in all likelihood would take months to resolve”
Female, 32, dual play intender, Manchester

3.6.1.2 Mobile number porting (via LPL switching process)

About a third of the mobile switchers in the sample who wanted to port their number reported difficulties in getting a porting authorisation code (PAC). This represents about 8% of the total mobile sample in this study, given that 40% switched and 64% of these switchers ported their number.

These difficulties tended to relate to timing issues, plus some additional ‘hassle’ (perceived) in being put through to a retention department to be convinced to stay. Some timing issues arose given the difficulties in getting a PAC ‘on demand’.

Some providers had a policy of sending the code through the post. In one instance, the PAC received didn’t work, which led to additional calls and time to get a new one.
Some felt that they were caught out a little by the notice period required, thinking initially, that they could sign up to a new provider straightaway. One or two participants had already signed up, and claimed to be faced with billing overlap.

Those who chose not to port their number either had no attachment to their existing number, or preferred not to contact their current provider for it.

Overall, the majority in the mobile sample claimed to be satisfied with the switching process.

“I think it was easy to get my PAC code because I’m still with [LP] for my TV and broadband”
Female, 44, mobile intender, Birmingham

“A few issues with [LP] in getting my PAC code, but once I left, they were helpful. The main issue was the notice period”
Male, 29, mobile intender, Portsmouth

“I wasn’t really bothered about keeping my number and didn’t really want to spend time having to contact [LP] to ask them for it and then have the hassle of them trying to convince me to stay with them”
Female, 33, mobile intender, Manchester

“They weren’t keen to give it over. Tried to get me to stay and put me on to a sales person to try to talk me out of moving. Took two phone calls and a lot of me talking and them not listening before I got them to give it to me. Also, they wouldn’t give it over the phone, saying they had to post it to me”
Male, 27, mobile intender, Belfast

In the above, it was clear that calling the current provider for a PAC gives the provider an opportunity to save the customer. Of course, by definition, these switchers did not respond to any save initiative. Among non-switchers, the evidence suggests that very few reached the stage of asking for their PAC, given a desire to stay with their current provider if they could get a better solution or deal.

In any event, the great majority in the sample sought contact with their current provider prior to deciding on whether to switch or not. This gave providers an opportunity to save, whether the customer asked for their PAC or not.

3.6.1.3 Cease & Re-provide switching issues

In this final section, some participants ceased their current service before setting up with a new provider. This process tended to feel most demanding of time and attention when it involved multiple services, i.e., triple play in particular. This said, many switchers in this scenario appeared to be well-organised and determined to manage the changeover with care. This was, primarily, driven by a fear of a gap or overlap in service provision.
In any event, it was clear that any gaps and overlaps were almost always caused by the providers involved, rather than the customer. This led to some degree of stress, hassle and annoyance, given problems with appointment setting for the installation, cancelation of the existing service, and billing issues.

Ultimately, however, the great majority claimed to be satisfied with the end result, even among those who had problems with the coordination of the changeover.

One or two participants stated that they regretted the decision to switch, given disappointment with the new service, or significant technical problems, and either dropped out, or failed to do so because they were not aware of the cooling off period.

“Despite all my hard work to organise, the change was dreadful. They gave me appointments and never turned up. They were awful. It took three appointments before they finally turned up. It took about three weeks. Such a hassle in having to take time off work, and a waste”

Female, 38, triple play intender, London

“Worth it in the end. We gained more channels, faster internet, happier son”

Male, 42, triple play intender, Birmingham

3.6.2 Levels of drop out at this stage

Drop out among switchers in the sample at this final stage of completion was relatively very low, and did not include any mobile planned switchers.

Figure 15: Drop out levels at the Complete stage

One or two participants had significant problems with their installation, and pulled out. One other participant claimed that they were convinced by their current provider to stay with them (during the switch, just prior to installation).

“After all that, they couldn’t connect to the house”

Male, 42, triple play intender, Glasgow

“My current provider called and convinced me to stay, so I cancelled”

Female, 37, dual play intender, Manchester
4. Appendices

4.1 Detailed method and approach adopted

Given the exploratory nature of this study, a qualitative approach was used that combined a series of introductory and reconvened focus group discussions with the use of an interactive electronic diary. A total of 158 respondents participated in the study across the following four stages:

Figure 16: The key stages of the research

<table>
<thead>
<tr>
<th>Stage</th>
<th>Format:</th>
<th>Purpose:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stage 1:</td>
<td>75 minute focus groups:</td>
<td>To meet and brief participants on what was required of them</td>
</tr>
<tr>
<td></td>
<td></td>
<td>At a spontaneous level, to capture some general background on each participant</td>
</tr>
<tr>
<td>Stage 2:</td>
<td>In-the-moment observation:</td>
<td>Use of an electronic diary(^{15}) to capture thoughts and actions in real-time</td>
</tr>
<tr>
<td>Stage 3:</td>
<td>90 minute reconvened groups:</td>
<td>Interaction at key moments to seek clarification and elaboration on key thoughts and actions</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Review of diary content and in-depth assessment of the switching experience ‘journey’</td>
</tr>
<tr>
<td>Stage 3:</td>
<td>Follow-up individual telephone interviews:</td>
<td>Assessment of post-switching decision experiences and deferral</td>
</tr>
</tbody>
</table>

The focus groups at Stages 2 and 3 each comprised an average of 9 respondents and were conducted across all four nations of the UK, representing both urban and rural locations. See Appendices 4.3 and 4.6 for a detailed breakdown of the sample achieved in each location.

The following documents overleaf show in detail the approach we took in the focus group discussions at Stage 1 and Stage 2.

\(^{15}\) A paper-based version of the diary was provided for \(n=6\) respondents who were not online.
Objectives for Stage 1

Overall:
- To gain and develop some basic understanding of the background and context to switching
- To brief respondents on their use of the diary for the in-the-moment capture of switching experiences during stage 2

In detail:
To gather spontaneous, unaided views on the following . . .
- Perceived importance of the service(s) they currently have, and the level of reliance / dependence on them
- Recap of which service(s) they want to switch
- Motivations that underlie the decision to switch – and how determined they are.

Stage 1 discussion guide

<table>
<thead>
<tr>
<th>TOPIC AREA</th>
<th>WHAT WE WANT TO UNDERSTAND</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. <strong>INTRODUCTION</strong></td>
<td>Re: their journey: they will be letting us follow them through their decisions and choices via a diary, and will be returning after they reach the end of their journey – whether they end up switching or not</td>
</tr>
<tr>
<td>• Who we are, what we do, our independence</td>
<td></td>
</tr>
<tr>
<td>• Explain the ‘journey’ that they are embarking upon – what we will be doing and why</td>
<td></td>
</tr>
<tr>
<td>• Put them at ease: informal, no right or wrong, not a test, etc.</td>
<td></td>
</tr>
<tr>
<td>• Answer any basic questions they ask</td>
<td></td>
</tr>
<tr>
<td>• Explain the room, i.e., audio and video recording</td>
<td></td>
</tr>
<tr>
<td>5 mins</td>
<td></td>
</tr>
<tr>
<td>2. <strong>PARTICIPANT INTRODUCTION</strong></td>
<td></td>
</tr>
<tr>
<td>Go around the table, one at a time . . .</td>
<td></td>
</tr>
<tr>
<td>• Work (if relevant)</td>
<td></td>
</tr>
<tr>
<td>• Home, family (household composition)</td>
<td></td>
</tr>
<tr>
<td>• Interests</td>
<td></td>
</tr>
<tr>
<td>• What they make use of, telecommunications and technology-wise (i.e., house phone, fixed broadband, pay TV, mobile)</td>
<td></td>
</tr>
<tr>
<td>5 mins</td>
<td></td>
</tr>
</tbody>
</table>
### 3. WARM UP

Get going with a topic that everyone can say something about, e.g., 'Tell me how you feel about communication services (at home and outside of the home). Explain if necessary: telephone, TV, internet, mobile, etc.'

Explore this at a spontaneous level, and then use general probes to ensure everyone is comfortable contributing:

- What's positive about it?
- How important is it to you / your household? How much do you rely on these services – probe into broadband users/uses...
- What are the benefits to you?
- What, if any, are the drawbacks?
- What kind of person are you, when it comes to adopting new technology? Why?
- And so on.

### 4. FOCUS ON THEIR INTENTION TO SWITCH

Explain: We chose you for this research because you say you are intending to switch one or more of your services. May I just check first . . .

Go round the table and ensure an understanding of . . .

- What they currently have, i.e., fixed line, fixed broadband, pay TV, mobile phone (standalone, and as a bundle)
- Who they currently have their service(s) with
- How long (approximately) they have subscribed to these services
- How long they have been with their current provider
- What they intend to switch

Then, go round the table again and check . . .

- What, overall, makes them want to switch? What is their key reason / motivation? What else? *Probe fully*
- What was the original trigger? (If different). What happened and / or what did they see? Did they reach the end of their contract?
- What do they want from a new provider, e.g. faster bb speeds, cheaper prices etc.?
- How determined are they to switch and where are they in the process? *Check with our 1-3 options . . .
  - Determined to switch and know who they will switch to?
  - Determined to switch, but no decision yet on who to switch to?
  - Fairly sure to switch, but no plan yet on who to switch to?
- What makes them say this?

Check also: have they ever switched before? Are their reasons for switching now similar to before, or different? How? In what way?
Stage 3 – Switching Provider – Focus Groups
Combined (Switchers and Non-switchers)

Objectives for Stage 3

- To identify and understand the types of difficulties that consumers face when trying to switch provider – and the impact of these issues on decisions to switch or not. Specifically . . .
  - The impact and triggers of save activity: whether welcomed or put under pressure and the extent to which this was a key factor in the decision not to switch
  - Losing and Gaining Provider behaviour that could be interpreted as ‘frustrating the process’

- To identify and explore other specific difficulties, issues, reasons for not switching that may arise, e.g., email portability

- To understand the impact, if any, on the decision to switch, of information (in written and verbal form) provided by both Gaining and Losing Providers during the switch process and after the switch has been agreed

- To assess the overall ease of the process and identify aspects of the process that were most difficult and what, if anything could be made easier

- To assess what was gain from switching or not switching and the level of satisfaction with the decision to switch or not switch.

- To address the above in each of the communications markets: fixed line, mobile and pre-pay\(^{\text{16}}\), fixed broadband and digital pay TV.

\(^{\text{16}}\) Includes only those pre-pay customers who wished to port their phone number
### Stage 3 discussion guide

**Final – 27th July 2014**

<table>
<thead>
<tr>
<th>TOPIC AREA</th>
<th>WHAT WE WANT TO UNDERSTAND</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1. INTRODUCTION</strong></td>
<td></td>
</tr>
<tr>
<td>- Welcome back and thanks for their diary participation</td>
<td>Check: why they wanted to switch and what triggered them to want to switch now? (e.g., reviewing finances, end of contract, saw a better deal, etc.)</td>
</tr>
<tr>
<td>- Explain the purpose of re-convening, i.e., to learn in detail about the ‘journey’ that they have made</td>
<td>We will refer to their statements in Stage 1 Group - % certainty to switch. <strong>Among switchers:</strong> At what point did they become 100% certain to switch? <strong>Among non-switchers:</strong> At what point did they go from x% certain to switch deciding not to switch?</td>
</tr>
<tr>
<td>- Remind them about our neutrality – not here to make judgments about whether they switched or not.</td>
<td></td>
</tr>
<tr>
<td>- Remind about audio and video recording</td>
<td></td>
</tr>
<tr>
<td><strong>2. PARTICIPANT INTRODUCTION</strong></td>
<td></td>
</tr>
<tr>
<td>Go around the table, one at a time and get a brief summary of the start and end point of their journey . . .</td>
<td>Note: in this section, we will be guided by the group on what these steps are, looking initially at . . .</td>
</tr>
<tr>
<td>- What they planned to do, at the outset</td>
<td>o What language they use to describe them</td>
</tr>
<tr>
<td>- What their main reason or trigger was for wanting to switch in the first place?</td>
<td>o How relevant they are to whom, and why</td>
</tr>
<tr>
<td>- What the final outcome was (switched? Not switched? Still in the process?)</td>
<td>o ‘Pain’ points that inhibited or prevented progress</td>
</tr>
<tr>
<td>- Overall level of satisfaction with their experience (mark out of 10)</td>
<td>o ‘Enabling’ points that facilitated the journey</td>
</tr>
<tr>
<td>- Comparison with expectations (at the outset)</td>
<td>o Etc.</td>
</tr>
<tr>
<td><strong>3. IDENTIFY THE KEY STEPS IN THEIR JOURNEY</strong></td>
<td>Overall, in this section, we want to identify different patterns and approaches, in the steps taken, and explore reasons, motivations and attitudes related to these different patterns and approaches (prior to getting into the detail)</td>
</tr>
<tr>
<td>Explain: We’ve been following your progress from your diaries and, from this, have identified each of the steps that you have taken. But first, we want to learn from you what the key steps are. Later, we will go through each of these steps in detail, to get a really good understanding of your experience. So, first, before talking about them in detail, can we just list out all the steps that have been relevant to you in your journey? Shout them out – and I will put them up on this flip chart (in no particular order)</td>
<td></td>
</tr>
<tr>
<td>Explore the list as a whole (at a high level) . . .</td>
<td></td>
</tr>
<tr>
<td>- Why ‘this’ step first (for some / all of you)?</td>
<td></td>
</tr>
<tr>
<td>- Why not ‘this’ step first (for others)?</td>
<td></td>
</tr>
<tr>
<td>- Which step(s) were most ‘important’? Why?</td>
<td></td>
</tr>
<tr>
<td>- Which steps were ‘easy’? Why? In what way?</td>
<td></td>
</tr>
<tr>
<td>- Which steps were more ‘difficult’? Why? In what way?</td>
<td></td>
</tr>
<tr>
<td>- Time spent on each step, and between each step? Explore reasons why</td>
<td></td>
</tr>
<tr>
<td>- What made you start to think about this in the first place?</td>
<td></td>
</tr>
<tr>
<td><strong>Among switchers:</strong> Which steps were most important in your decision to switch? Why, in what way?</td>
<td></td>
</tr>
<tr>
<td><strong>Among non-switchers:</strong> Which steps were most important in your decision not to switch? Why and in what way?</td>
<td></td>
</tr>
</tbody>
</table>
4. **EXPLORE THE STEPS IN DETAIL**

   Explain: Let’s now look at each of these steps in detail. Some steps, of course, are not relevant to some of you and some steps are more relevant to some of you than others. Feel free to speak out and express your views about each step that is relevant. I will be asking specific questions along the way, from what we have learned about you from your individual diaries.

   A detailed exploration of participant’s experience as a journey, based on steps related to engaging, accessing, assessing and acting.

   Note: we will introduce steps (identified from the diaries) that have not been mentioned spontaneously in Section 3.

### ASSESS STAGE

#### 4A. Researching the market

- **Check:** main sources used / relied on
- **Probe on cost versus quality – which more important or equally, why?**
- What did they most strongly rely on? Why?
- What most helped their decision-making? Why?
- What made their decision-making more difficult?
- Why not used? (for those who did not do research)
- How they chose / shortlisted potential providers
- Length of time on this stage
- Overall satisfaction – and how it could be improved

**Checklist for moderator:**
- Differences in the amount of time spent on this stage – and reasons for spending more / less time
- Specific pros and cons of sources and types (in-store, telephone, online info, online chat, friends / colleagues, etc.)
- Whether current providers were part of this research. Why? Why not?
- Whether potential providers were part of this research. Why? Why not?

15 mins

#### 4B. Contact with current provider(s) – prior to any decision to switch

- What contact did they have with their current provider(s)?
- Was this before or after contact with a potential provider?
- Why contact their current provider, and why contact them first?
- Thoughts and feelings about the discussions they had?
- Did anything said (or offered) by the current provider put them off? What? Why?
- How did this conversation help their decision?
- If mention save activity, probe on attitudes to this

**Checklist for moderator:**
- How contacted and who initiated the contact? (Covering web chat, email, phone, in-store, etc.)
- What evidence is there of save activity at this point? (e.g., price-matching, under-cutting competitors, ETCs, loss of services and content, other issues that discourage switching?)
- What made them want to contact their current provider (in the first instance)?
- Why not talk to a potential provider first?
- Why not talk only to a potential provider?

10 mins
### 4c. Contact with potential provider(s) – prior to any decision to switch

- How many providers contacted prior to their decision?
- Why contact them?
- Thoughts and feelings about the discussions they had?
- Did this conversation help their decision or hinder it? In what way?

#### Checklist for moderator:

**Ditto above, plus . . .**

- How well were they informed about specifics?
  (e.g., number and email portability)

### 5 mins

#### ‘ACT’ STAGE

### 4d. Non-switchers: Making the decision not to switch

**QUICK CHECK TO SEE IF ANYTHING NOT FULLY EMERGED IN PREVIOUS SECTIONS**

- What made them decide to stick with their current provider? What was the deciding factor?
- What other reasons were there that had an influence?
- What particular aspects of their experience ‘prevented’ or discouraged them from switching?
- How easy or difficult was it to reach this decision?
- How much time spent considering their decision?
- How does their decision compare to what they set out to do? What influenced their change of plan?

#### Moderator: seek input / reactions from

- switchers:
  - How / in what was this different for switchers?
  - Why were switchers not prevented or discouraged (in the way that non-switchers describe)?

- Were any of the following specific barriers to switching?
  - General save activity – the response of their current provider
  - Ease of porting mobile and landline numbers – any difficulties with this? What? Why?
  - Difficulty with cancellation, if they wanted to change their mind
  - Fear of loss of service during the switch?

### 3 mins

### 4e. Switchers: Making the decision to switch

**QUICK CHECK TO SEE IF ANYTHING NOT FULLY EMERGED IN PREVIOUS SECTIONS**

- What made them decide to switch to another provider / their chosen provider? What was the deciding factor?
- What other reasons were there that had an influence?
- How easy / difficult was it to reach this decision? How much time spent considering their decision?
- How does their decision compare to what they set out to do? In what way is it different? What influenced this change of plan?

#### Moderator: seek input / reactions from non-switchers:

- How / in what was this different for non-switchers?
- Why were non-switchers not facilitated or encouraged (in the way that switchers describe)?
4F: Switchers: contact with LP and GP, to enable the switch
- Any contact / reaction / response from their current provider? When? What? How?
- How do they feel about this?
- What particular aspects of contact with the LP and GP made the switch easy?
- What aspects made it difficult?
- Speed and convenience of the switch?
- Overall satisfaction – how could it be improved?
- Do they consider they are now on the best deal for them?

Checklist for moderator:
- Any instances of their current provider making it difficult to switch? What? How?
- What evidence is there of reactive save?
- How contacted and who initiated the contact? (Covering web chat, email, phone, in-store, etc.)
- When talking to the LP, what ‘department’ did they speak to? How did the conversation go?
- Ease of porting mobile and landline numbers – any difficulties with this? What? Why?
- Any experience of handsets being locked (mobile) or being charged to unlock, time delays, etc.?
- Ease of cancellation, and how done?
- Any loss of service during the switch? What? How?
- Any installation issues?

4G: Activity / contact after decision (to switch or not switch)
- What’s happened, if anything, in the aftermath?
- Any contact from providers? What? How? Why? When?
- For switchers: if contact by LP, how many times?
- For non-switchers: if promised something from their current provider, have they received this? Did they get what they were promised?
- Any source of ‘regret’ or unhappiness about the decision they made.
- Any billing issues or unexpected changes??

5 mins

5. WRAP-UP
Overall, if they were to do it all again . . .
- What did they gain or lose from switching or not switching?
- What would they have done differently?
- How could the whole experience be best improved?

Identify / confirm any participants who are not complete in their journey (i.e., still in cool-off period). Seek permission to re-contact (via telephone and Diary) to assess . . .
- The effect / impact, if any, of cool-off contract clauses
- Any source of ‘regret’ or unhappiness about the decision they made.

Collect all correspondence. Thank again and end.
4.2 Detailed sample achieved

The participants in the sample for this study were . . .

- Consumers genuinely active in seeking to switch one or more communications services (fixed landline, fixed broadband, dual-play, triple-play, pay TV, or Mobile)
- Out of contract, or nearing the end of their contract
- Not looking to switch because of a house move
- The principal or joint decision-maker for communications services

Participants were also selected on the basis of their current provider. In the pay TV, fixed landline, fixed broadband, dual-play and triple-play markets, the breakdown of the sample achieved was as follows . . .

**Figure 17: Sample achieved for fixed landline, broadband and pay TV services**

<table>
<thead>
<tr>
<th></th>
<th>Intending to switch:</th>
<th>Current provider:</th>
<th>Required (n)</th>
<th>Achieved (n)</th>
<th>Possible switching process:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Fixed line only</strong></td>
<td></td>
<td>BT</td>
<td>4</td>
<td>4</td>
<td>GPL NoT or C&amp;R</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Sky</td>
<td>4</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>TalkTalk</td>
<td>4</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Virgin Media</td>
<td>0</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td><strong>Fixed broadband only</strong></td>
<td></td>
<td>BT</td>
<td>5</td>
<td>3</td>
<td>GPL NoT or C&amp;R</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Sky</td>
<td>4</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>TalkTalk</td>
<td>5</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Virgin Media</td>
<td>6</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Orange</td>
<td>8</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td><strong>Pay TV only</strong></td>
<td></td>
<td>BT</td>
<td>2</td>
<td>4</td>
<td>C&amp;R</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Sky</td>
<td>4</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>TalkTalk</td>
<td>2</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Virgin Media</td>
<td>6</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td><strong>Multiple services</strong></td>
<td>17</td>
<td>BT</td>
<td>5</td>
<td>9</td>
<td>GPL NoT or C&amp;R</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Sky</td>
<td>3</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>TalkTalk</td>
<td>6</td>
<td>9</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Virgin Media</td>
<td>3</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Orange</td>
<td>7</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td><strong>Dual Play</strong></td>
<td></td>
<td>BT</td>
<td>2</td>
<td>2</td>
<td>GPL NoT or C&amp;R</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Sky</td>
<td>4</td>
<td>7</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>TalkTalk</td>
<td>2</td>
<td>3</td>
<td>Mix of GPL NoT and C&amp;R</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Virgin Media</td>
<td>4</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td><strong>Triple Play</strong></td>
<td></td>
<td></td>
<td>90</td>
<td>96</td>
<td></td>
</tr>
</tbody>
</table>

17 One participant intended to switch their landline service (currently with BT), their fixed broadband (currently with Virgin Media) and their pay TV service (currently with Sky).
In the mobile market, the breakdown of the sample achieved was as follows . . .

Figure 18: Sample achieved for mobile service

<table>
<thead>
<tr>
<th>Current provider</th>
<th>Required (n)</th>
<th>Achieved (n)</th>
<th>Possible switching process:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Orange</td>
<td>10</td>
<td>11</td>
<td></td>
</tr>
<tr>
<td>Virgin Mobile</td>
<td>10</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>T-Mobile</td>
<td>10</td>
<td>11</td>
<td>LPL PAC or C&amp;R</td>
</tr>
<tr>
<td>Vodafone</td>
<td>10</td>
<td>11</td>
<td></td>
</tr>
<tr>
<td>Three</td>
<td>10</td>
<td>9</td>
<td></td>
</tr>
<tr>
<td>O2</td>
<td>10</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>60</strong></td>
<td><strong>62</strong></td>
<td></td>
</tr>
</tbody>
</table>

4.3 Recruitment and screening of participants

The following recruitment specification and screening of participants was applied in this study:

Switching Communications Providers


INTRODUCTION:

The study is being conducted on behalf of Ofcom, the independent regulator of telecommunications, which protects the interests of consumers. The aim of the study is to learn about the experiences that people have when they switch communications services providers. By communications services, we mean a mobile telephone, a landline (house) phone, a fixed broadband internet connection in the home, and TV that people pay a subscription for. Some people have more than one of these services from the same provider. Others have them with different providers.

OUR APPROACH:

We need to recruit people who are actively intending to switch one or more of their services to a different provider. This means that they will be out of contract or near to the end of their contract with their current provider.

We want these people that we recruit to take a full and active role in all three stages of the study, as follows:

- **Stage 1:** These will be 75 minute focus groups. We want to meet, develop some nice rapport with them, learn a little about the experiences they have had with their current provider and, most importantly, to explain what we want them to do at stage 2.
Switching Communications Provider: The Consumer Experience

- **Stage 2:** This is a diary stage that we will be asking people to use to note down and document exactly what happens at each stage in their switching process. Most, we hope, will be comfortable using an online version of the diary. If they are not comfortable, we will provide a paper version. At Stage 1, we will explain all they need to know about how to use this diary. Importantly, the online diary has an interactive element to it. We will be monitoring what they write in the diary and also sending questions at different stages in their process. The diary is entirely private and no-one other than ourselves as researchers would see each diary. For the paper-version, we would like to telephone the respondents from time to time to monitor their progress and ask them various questions as we are doing for the online version.

- **Stage 3:** These will be 90 minute focus groups. We want to reconvene our people from Stage 1 and 2, so that we can learn about their experiences at Stage 2.

**Important:** We are looking for people who are actively intending to switch provider within the next 6 weeks or so and would therefore expect that a proportion of them will switch. However, we do not wish to encourage anyone to switch. We would expect that some won’t switch, despite making an effort to do so. This is fine, since we also want to learn, at Stage 3, about the reasons for not switching. Ultimately, what we want to do is to learn about the natural process that they go through, whether they end up switching or not. The really important aspect is recruiting people who are keen to switch – and for us, at Stage 1, to develop rapport with them to ensure that they are motivated to fill in the diary at Stage 2 and come back to see us at Stage 3.

**Note:** We are not being specific about the dates for Stage 3, because we don’t know yet how long the process will take. We expect that most will complete their process at Stage 2 in less than a month. Others, though, may take longer. We need to be flexible at this stage – to give people sufficient time to complete their process. However, we don’t want it to drag on for so long because we need to keep the experiences fresh in people’s minds. We will decide on a set of exact dates for Stage 3, during our monitoring of Stage 2 – and ensure that these dates will work for you and for the respondents. Anyone who has still not completed their switching process will, if necessary, be followed up by us after Stage 3, with a telephone call.

**Timing at Recruitment**

When you start recruiting, you may find that some people are so minded to switch that they have either done so (or gone as far as to contact their current provider and / or a potential new provider), before they attend the groups at Stage 1. That won’t work for us, since we want to be able to monitor their process from the start (or at least before they make any contact with a provider).

Accordingly, can you please ask all respondents to NOT do anything, until we have spoken to them in the groups at Stage 1? We want them to put things on hold and ‘suspend’ their actions until this point. There is a question on this in the screener (see Q27).

If you find anyone who fits the quota and has actually spoken to a provider already, please hold them in reserve. We may then decide to speak to them individually to ask if they will fill in the diary and attend Stage 3 (skipping the groups at Stage 1).
WHO EXACTLY DO WE NEED TO RECRUIT?

All in the sample need to be consumers who are . . .

- (i) out of contract, or (ii) nearing the end of their contract\(^{18}\) and actively looking to switch\(^{19}\) one or more of their communications services to a different provider
- Not looking to switch their provider because they are moving house
- The principal or joint decision maker for telecoms services (used personally) and / or installed in the home
- Not working or involved in any way with the telecommunications or TV industry (including close members of family).

Note: (Those on Pay as you Go mobile (PAYG) must be actively looking to switch in the next 6 weeks or so and wishing to port their number.

Within each group, we need to achieve a good spread of ages / life-stages and a roughly even split of males and females.

HOW WE WISH TO STRUCTURE THE SAMPLE:

For Stage 1, we need to recruit a total of 17 focus groups . . .

- 11 groups for the fixed line, fixed broadband and pay TV sample (recruiting a minimum of 8 participants per group)
- 6 groups for the mobile phone sample (recruiting a minimum of 10 participants per group)

The groups may be mixed (to make recruitment easier), i.e., by service type for the fixed line, broadband and pay TV groups, and by brand for the mobile phone groups. An example of how this may be done is as follows . . .

<table>
<thead>
<tr>
<th>Intending to switch:</th>
<th>Fixed Line only</th>
<th>Broadband only</th>
<th>Pay TV only</th>
<th>Dual-play</th>
<th>Triple-play</th>
<th>Minimum</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group 1:</td>
<td>n=2</td>
<td>n=2</td>
<td>n=2</td>
<td>n=2</td>
<td>n=8</td>
<td></td>
</tr>
<tr>
<td>Group 2:</td>
<td>n=2</td>
<td>n=2</td>
<td>n=2</td>
<td>n=4</td>
<td>n=8</td>
<td></td>
</tr>
<tr>
<td>Group 3:</td>
<td>n=2</td>
<td>n=2</td>
<td>n=2</td>
<td>n=2</td>
<td>n=8</td>
<td></td>
</tr>
<tr>
<td>Group 4:</td>
<td>n=4</td>
<td>n=4</td>
<td></td>
<td>n=4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Group 5:</td>
<td>n=2</td>
<td>n=2</td>
<td>n=2</td>
<td>n=2</td>
<td>n=8</td>
<td></td>
</tr>
<tr>
<td>Group 6:</td>
<td>n=4</td>
<td>n=4</td>
<td></td>
<td>n=4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Group 7:</td>
<td>n=2</td>
<td>n=2</td>
<td>n=2</td>
<td>n=3</td>
<td>n=9</td>
<td></td>
</tr>
<tr>
<td>Group 8:</td>
<td>n=4</td>
<td>n=4</td>
<td></td>
<td>n=4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Group 9:</td>
<td>n=2</td>
<td>n=2</td>
<td>n=2</td>
<td>n=3</td>
<td>n=9</td>
<td></td>
</tr>
<tr>
<td>Group 10:</td>
<td>n=4</td>
<td></td>
<td></td>
<td>n=4</td>
<td>n=8</td>
<td></td>
</tr>
<tr>
<td>Group 11:</td>
<td></td>
<td></td>
<td></td>
<td>n=2</td>
<td>n=8</td>
<td></td>
</tr>
</tbody>
</table>

12 28 14 22 12 90

\(^{18}\) Some participants may not know if they are out of their contract or when they are out of contract. We can include these people provided they claim that they are actively intending to switch within the next 6 weeks or so. We may find that some participants may be wishing to switch even if they are still in contract. These people qualify for our research project. We just need to monitor this to ensure we don’t have too many of these people in the sample.

\(^{19}\) The screener will check on whether people have switched before. Switching before is okay.
Switching Communications Provider: The Consumer Experience

**Mobile Phone Group Compositions:**

<table>
<thead>
<tr>
<th>Current provider</th>
<th>Orange</th>
<th>Virgin Mobile</th>
<th>T-Mobile</th>
<th>Vodafone</th>
<th>Three (3)</th>
<th>O2</th>
<th>Minimum</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group 1:</td>
<td>n=3</td>
<td>n=3</td>
<td>n=4</td>
<td></td>
<td></td>
<td></td>
<td>n=10</td>
</tr>
<tr>
<td>Group 2:</td>
<td></td>
<td>n=3</td>
<td>n=3</td>
<td>n=4</td>
<td></td>
<td></td>
<td>n=10</td>
</tr>
<tr>
<td>Group 3:</td>
<td>n=3</td>
<td>n=3</td>
<td>n=3</td>
<td>n=4</td>
<td></td>
<td></td>
<td>n=10</td>
</tr>
<tr>
<td>Group 4:</td>
<td>n=3</td>
<td></td>
<td>n=4</td>
<td>n=3</td>
<td>n=3</td>
<td></td>
<td>n=10</td>
</tr>
<tr>
<td>Group 5:</td>
<td>n=4</td>
<td></td>
<td>n=3</td>
<td></td>
<td>n=3</td>
<td></td>
<td>n=10</td>
</tr>
<tr>
<td>Group 6:</td>
<td>n=4</td>
<td></td>
<td></td>
<td>n=2</td>
<td>n=4</td>
<td></td>
<td>n=10</td>
</tr>
<tr>
<td>Total:</td>
<td>10</td>
<td>10</td>
<td>10</td>
<td>10</td>
<td>10</td>
<td></td>
<td>60</td>
</tr>
</tbody>
</table>

**Additional Notes for the Recruiter:**

- Our use of the term pay TV relates to TV services that consumers pay for (as opposed to Freeview). An obvious example is Sky. Other examples are BT Vision (which is now called BT TV). Virgin Media is, of course, a cable service and so you will need to locate potential respondents living in cable areas for this segment.

- Consumers who are signed up with BT or TalkTalk for TV services may refer to YouView. YouView is actually a box that comes with the service from BT or TalkTalk that allows you to record TV programs for viewing at a later date. It is possible that people have purchased a YouView box separately and have not signed up to a contract. Accordingly, if any of the respondents say ‘YouView, we need to check that they are in contract with BT or TalkTalk.

- Our use of the terms ‘Dual Play’ and ‘Triple Play’ refer to ‘bundles’ or packages from the same provider that consumers pay one monthly amount for. A dual play bundle is a fixed landline (house phone) plus fixed broadband. Triple play is dual play plus pay TV.

- With dual and particularly triple play, please take care to establish what consumers actually make use of (as opposed to pay for). There is the possibility that some may think they are paying for one service even though they are using two or all three. For example, they may have wanted a broadband service and have taken this with TV and a phone as a package because of the deal. The tendency may be to think they are paying only for the broadband service, i.e., the other services came for free. In this case, they would still qualify as a triple play user because the contract they have applies to all three components.

- In the mobile phone market, some may mention EE rather than Orange. T-Mobile may also be mentioned as EE. The reason why is that both of the brands, Orange and T-Mobile, are now owned by EE. If respondents say they are with EE, please be sure to ask whether they are T-Mobile or Orange. We are only interested in people who are planning to move away from T-Mobile or Orange, to another provider but not to EE. This is covered in the screener.

The screener starts on the next page.
Switching Communications Providers
Recruitment Screener – Final – 15th April 2014

Hello. My name is ________________ from ___________________.
We are conducting an important research study about telephone, mobile, TV and internet services, on behalf of Ofcom which regulates the UK telecommunications industry. May I ask you a few questions?

REASSURE: Everything you say as part of the research will be entirely confidential. We are not trying to sell you anything, etc.

Q1. Firstly, we need to be sure that we recruit people who work in certain occupations. Could you please tell me if you, any members of your family or close friends work in any of the following areas?

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Marketing or advertising</td>
<td>CLOSE</td>
</tr>
<tr>
<td>B</td>
<td>Market research</td>
<td>CLOSE</td>
</tr>
<tr>
<td>C</td>
<td>Journalism / Public relations / The media</td>
<td>CLOSE</td>
</tr>
<tr>
<td>D</td>
<td>Telecommunications industry, including broadband, mobile phones, TV, in any capacity</td>
<td>CLOSE</td>
</tr>
<tr>
<td>E</td>
<td>None of these</td>
<td>CONTINUE</td>
</tr>
</tbody>
</table>

Q2. Have you participated in any kind of market research in the past 6 months?

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Yes</td>
<td>CLOSE</td>
</tr>
<tr>
<td>2</td>
<td>No</td>
<td>CONTINUE</td>
</tr>
</tbody>
</table>

Q3. Gender (INT: Do not ask)

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Female</td>
<td>PLEASE ENSURE A ROUGHLY EQUAL MIX</td>
</tr>
<tr>
<td>2</td>
<td>Male</td>
<td></td>
</tr>
</tbody>
</table>

Q4. Which of the following statements best describes your role when it comes to deciding on what landline telephone, TV and internet services in your home to pay for and use?

READ LIST. RECORD ONE RESPONSE.

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>I am the primary decision-maker in my household</td>
<td>CONTINUE</td>
</tr>
<tr>
<td>B</td>
<td>I share in the responsibility</td>
<td>CONTINUE</td>
</tr>
<tr>
<td>C</td>
<td>Others make the decisions</td>
<td>SEEK REFERRAL OR CHECK FOR ELIGIBILITY FOR THE MOBILE PHONE SAMPLE AT Q5</td>
</tr>
</tbody>
</table>
Q5. Which of the following statements best describes your role when it comes to deciding on what mobile phone to pay for and use?

**READ LIST. RECORD ONE RESPONSE.**

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>I am the primary decision-maker for my mobile phone</td>
<td>CONTINUE</td>
</tr>
<tr>
<td>B</td>
<td>I share in the responsibility</td>
<td>CONTINUE</td>
</tr>
<tr>
<td>C</td>
<td>Others make the decision</td>
<td>SEEK REFERRAL</td>
</tr>
<tr>
<td>D</td>
<td>I don’t have a mobile phone</td>
<td>CLOSE, OR CHECK FOR ELIGIBILITY FOR THE FIXED LINE, BROADBAND &amp; PAY TV SAMPLE</td>
</tr>
</tbody>
</table>

FOR Q4 AND / OR Q5, IT IS ESSENTIAL THAT RESPONDENT PLAYS A SIGNIFICANT ROLE IN DECISION-MAKING

Q6. Which one of the following age categories do you fall into? Record Exact: ……………………………..

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Younger than 18 years</td>
<td>CLOSE</td>
</tr>
<tr>
<td>B</td>
<td>18 to 24</td>
<td></td>
</tr>
<tr>
<td>C</td>
<td>25 to 34 years</td>
<td></td>
</tr>
<tr>
<td>D</td>
<td>35 to 44</td>
<td></td>
</tr>
<tr>
<td>E</td>
<td>45 to 54</td>
<td></td>
</tr>
<tr>
<td>F</td>
<td>55 to 64</td>
<td></td>
</tr>
<tr>
<td>G</td>
<td>65 to 74</td>
<td></td>
</tr>
<tr>
<td>H</td>
<td>75 or older</td>
<td></td>
</tr>
</tbody>
</table>

Q7. What, if any, is the occupation of the chief income earner in your household?

(IF RETIRED, THEN PLEASE ASK: What, if any, was the occupation of the chief income earner in your household?) TO OBTAIN AN ACCURATE MEASURE OF SOCIAL GRADE, PLEASE PROBE FOR: position / rank / grade, industry, qualifications and number of staff responsible (if any)

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>A</td>
<td>PLEASE ENSURE A GOOD SPREAD</td>
</tr>
<tr>
<td>2</td>
<td>B</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>C1</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>C2</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>D</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>E</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Refused / not stated</td>
<td>THANK &amp; CLOSE</td>
</tr>
</tbody>
</table>

Q8. Which of the following communications services do you have in your home? READ OUT AND CODE ALL THAT APPLY BELOW – IF NONE THEN CHECK IF THEY QUALIFY FOR THE MOBILE PHONE SAMPLE AT Q18 ONWARDS

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>A fixed landline house phone</td>
<td></td>
</tr>
<tr>
<td>B</td>
<td>A fixed modem / router for wired or Wi-Fi broadband internet access</td>
<td></td>
</tr>
<tr>
<td>C</td>
<td>A paid-for subscription for TV services</td>
<td></td>
</tr>
</tbody>
</table>
Q9. For each of the communications services you say you have in your home, who is your current provider? CODE ALL THAT APPLY IN THE TABLE BELOW, CHECK QUOTA & CONTINUE.

IF NONE OF THE ONES SHOWN APPLY THEN CHECK IF THEY QUALIFY FOR THE MOBILE PHONE SAMPLE AT Q18 ONWARDS

<table>
<thead>
<tr>
<th>Q8. Installed in their home</th>
<th>BT</th>
<th>Sky</th>
<th>TalkTalk</th>
<th>Virgin Media</th>
<th>Orange</th>
</tr>
</thead>
<tbody>
<tr>
<td>A fixed landline house phone</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A fixed modem / router for wired or Wi-Fi broadband internet access</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A paid-for subscription for TV services</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

INTERVIEWER: PLEASE CHECK QUOTA FOR CURRENT PROVIDER

ASK Q10 & Q11 FOR EACH SERVICE INSTALLED IN THE HOME MENTIONED AT Q8

Q10. For your [MENTION AT Q8] service, are you intending to switch this service to another provider within the next 6 weeks or so? CODE EACH THAT APPLIES BELOW & CONTINUE. IF NONE, THEN GO TO Q18

<table>
<thead>
<tr>
<th>Q10 – Intending to switch?</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>A fixed landline house phone</td>
<td></td>
</tr>
<tr>
<td>B</td>
<td>A fixed modem / router for wired or Wi-Fi broadband internet access</td>
<td></td>
</tr>
<tr>
<td>C</td>
<td>A paid-for subscription for TV services</td>
<td></td>
</tr>
</tbody>
</table>

Q11. What makes you want to switch your [MENTION AT Q8] service? What is the main reason for wanting to do so? WRITE IN VERBATIM. PROBE FULLY

<table>
<thead>
<tr>
<th>Q10 – Intending to switch:</th>
<th>Q11 – Main reason for wanting to switch:</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>A fixed landline house phone</td>
</tr>
<tr>
<td>B</td>
<td>A fixed modem / router for wired or Wi-Fi broadband internet access</td>
</tr>
<tr>
<td>C</td>
<td>A paid-for subscription for TV services</td>
</tr>
</tbody>
</table>
ASK Q12 FOR EACH SERVICE THEY ACTIVELY INTEND TO SWITCH AT Q10

Q12. You say that you intend to switch [SERVICE AT Q10]. Thinking about how certain you are to actually switch and where you are with it, which ONE of the follow statements best applies?

READ OUT & CODE IN THE TABLE BELOW

1. I am determined to switch, know who I am going to switch to, and have already contacted my intended provider and / or my current provider

2. I am determined to switch, and know who I am going to switch to but have not done anything else yet.

3. I have started looking into alternative providers but not contacted anyone yet

4. I’m fairly sure I will switch but have not yet started looking into alternative providers

<table>
<thead>
<tr>
<th>Q10 – Intending to switch:</th>
<th>Q12 – Level of certainty to switch and how far they have got:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1</td>
</tr>
<tr>
<td>A A fixed landline house phone</td>
<td></td>
</tr>
<tr>
<td>B A fixed modem / router for wired or Wi-Fi broadband internet access</td>
<td></td>
</tr>
<tr>
<td>C A paid-for subscription for TV services</td>
<td></td>
</tr>
</tbody>
</table>

INTERVIEWER: IF CODE 1 FOR ANY SERVICE, THEN HOLD IN RESERVE, OTHERWISE CONTINUE (BUT CHECK EXCLUSIONS ON PAGE 13 IF CODE 1 OR 2)

ASK Q13 FOR EACH SERVICE THEY ACTIVELY INTEND TO SWITCH AT Q10

Q13. You say that you intend to switch [SERVICE AT Q10]. Which provider(s) are you likely to consider switching to for this service? CODE ALL THAT APPLY

<table>
<thead>
<tr>
<th></th>
<th>A fixed landline house phone</th>
<th>A fixed modem / router for wired or Wi-Fi broadband Internet access</th>
<th>A paid-for subscription for TV services</th>
</tr>
</thead>
<tbody>
<tr>
<td>A Orange</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B Virgin Media</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C TalkTalk</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>D Sky</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>E BT</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>F Other [PLEASE WRITE IN]</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>G Don't Know / Can’t say</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### INTERVIEWER CHECK:

<table>
<thead>
<tr>
<th>Intending to Switch (Q10):</th>
<th>Check Quota for Current Provider (Q9):</th>
<th>Exclusions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>A Only:</strong></td>
<td>Recruit as potential fixed line only switcher</td>
<td>None</td>
</tr>
</tbody>
</table>
| **B Only:**                | Recruit as potential fixed broadband only switcher | • Exclude if certain to switch (Code 1 or 2 at Q12) and they say ‘Other’ at Q13, unless they are switching from Virgin Media  
• Exclude if currently with BT (Q9) and certain to switch (Code 1 or 2 at Q12) to Orange (Q13)  
• Exclude if currently with Orange (Q9) and certain to switch (Code 1 or 2 at Q12) to BT (Q13) |
| **C Only:**                | Recruit as potential pay TV only switcher | None       |
| **A & B Only:**            | Recruit as potential fixed line & broadband switcher (dual play) | • Exclude if Code 1 or 2 at Q12 and ‘Other’ at Q13, unless they are switching from Virgin  
• Exclude if currently with BT (Q9) and certain to switch (Code 1 or 2 at Q12) to Orange (Q13)  
• Exclude if currently with Orange (Q9) and certain to switch (Code 1 or 2 at Q12) to BT (Q13) |
| **A, B and C:**            | Recruit as potential fixed line, broadband and pay TV switcher (triple play) | None       |
| **None of the Above:**     | Go to Q18                                 |            |

**Q14.** May I just check, for the services that you currently have, do you know if you are still in contract with each of them? Read out all the services they have at Q8 – code all that apply

<table>
<thead>
<tr>
<th>Q8. Installed in their home</th>
<th>Q14 – Whether in contract</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Still in contract</td>
</tr>
<tr>
<td>A fixed landline house phone</td>
<td>![ ]</td>
</tr>
<tr>
<td>A fixed modem / router for wired or Wi-Fi broadband internet access</td>
<td>![ ]</td>
</tr>
<tr>
<td>A paid-for subscription for TV services</td>
<td>![ ]</td>
</tr>
</tbody>
</table>

Ask Q15 if any still in contract

- If yes, go to Q17
- If no, go to Q16
Q15. **How long is left to run on your contract for** [each Service mentioned at Q8]?

<table>
<thead>
<tr>
<th>Q8. Installed in their home</th>
<th>Less than a month</th>
<th>1 to 2 months</th>
<th>3 months or more</th>
<th>DK / Can’t say</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>A fixed landline house phone</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>B</td>
<td>A fixed modem / router for wired or Wi-Fi broadband internet access</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>C</td>
<td>A paid-for subscription for TV services</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>

GO TO Q17

GO TO Q16

Q16. **Even though you are still in contract (or are unsure whether you are or not), are you actively seeking to switch one or more of your services within the next 6 weeks or so?**

- ☐ Yes \(\rightarrow\) GO TO Q17
- ☐ No \(\rightarrow\) CLOSE
- ☐ Don’t know / can’t say \(\rightarrow\) CLOSE

ASK ALL

Q17. **Have you switched any one of these services to a different provider in the last five years?**

- ☐ Yes \(\rightarrow\) CONTINUE
- ☐ No

MOBILE PHONE SAMPLE:

ASK ALL

Q18. **Do you own and use a mobile phone?**

- ☐ Yes \(\rightarrow\) CONTINUE
- ☐ No \(\rightarrow\) SKIP TO Q30 IF THEY QUALIFY FOR THE FIXED LINE, BROADBAND & PAY TV SAMPLE – OTHERWISE CLOSE

Q19. **For your mobile phone, who is your current network service provider?**

IF NOT LISTED BELOW THEN SKIP TO Q30 IF THEY QUALIFY FOR THE FIXED LINE, BROADBAND & PAY TV SAMPLE – OTHERWISE CLOSE

- Orange
- Virgin Mobile
- T-Mobile
- Vodafone
- Three (3)
- O2

Q20. **Are you intending to switch your mobile phone network service to another provider within the next 6 weeks or so?**

- ☐ Yes \(\rightarrow\) CONTINUE
- ☐ No \(\rightarrow\) SKIP TO Q30 IF THEY QUALIFY FOR THE FIXED LINE, BROADBAND & PAY TV SAMPLE – OTHERWISE CLOSE
Q21. You say that you actively intend to switch your mobile phone service. Thinking about how certain you are to switch and where you are with it, which ONE of the follow statements best applies? READ OUT. SINGLE CODE ONLY

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>I am determined to switch, know who I am going to switch to, and have already contacted my intended provider and / or my current provider</td>
<td>HOLD IN RESERVE BUT CHECK EXCLUSIONS ON PAGE 16</td>
</tr>
<tr>
<td>2</td>
<td>I am determined to switch, and know who I am going to switch to but have not done anything else yet.</td>
<td>CONTINUE BUT CHECK EXCLUSIONS ON PAGE 16</td>
</tr>
<tr>
<td>3</td>
<td>I have started looking into alternative providers but not contacted anyone yet</td>
<td>CONTINUE</td>
</tr>
<tr>
<td>4</td>
<td>I’m fairly sure I will switch but have not yet started looking into alternative providers</td>
<td>CONTINUE</td>
</tr>
</tbody>
</table>

Q22. What makes you want to switch your mobile phone service? What is the main reason for wanting to do so? WRITE IN VERBATIM. PROBE FULLY

Q23. Which provider(s) are you likely to consider switching your mobile phone service to?

CODE ALL THAT APPLY

<table>
<thead>
<tr>
<th>A</th>
<th>Orange</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>B</td>
<td>Virgin Mobile</td>
<td></td>
</tr>
<tr>
<td>C</td>
<td>T-Mobile</td>
<td></td>
</tr>
<tr>
<td>D</td>
<td>Vodafone</td>
<td></td>
</tr>
<tr>
<td>E</td>
<td>Three (3)</td>
<td></td>
</tr>
<tr>
<td>F</td>
<td>O2</td>
<td></td>
</tr>
<tr>
<td>G</td>
<td>EE</td>
<td></td>
</tr>
<tr>
<td>H</td>
<td>Other [PLEASE WRITE IN]</td>
<td></td>
</tr>
<tr>
<td>I</td>
<td>Don’t Know / Can’t say</td>
<td></td>
</tr>
</tbody>
</table>

INTERVIEWER CHECK:

<table>
<thead>
<tr>
<th>INTENDING TO SWITCH (Q20):</th>
<th>CHECK QUOTA FOR CURRENT PROVIDER (Q19):</th>
<th>EXCLUSIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>YES</td>
<td>Orange</td>
<td>EXCLUDE IF CERTAIN TO SWITCH (CODE 1 OR 2 AT Q21) AND INTENDING TO SWITCH TO ‘EE’ (Q23)</td>
</tr>
<tr>
<td></td>
<td>Virgin Mobile</td>
<td>NONE</td>
</tr>
<tr>
<td></td>
<td>T-Mobile</td>
<td>EXCLUDE IF CERTAIN TO SWITCH (CODE 1 OR 2 AT Q21) AND INTENDING TO SWITCH TO ‘EE’ (Q23)</td>
</tr>
<tr>
<td></td>
<td>Vodafone</td>
<td>NONE</td>
</tr>
<tr>
<td></td>
<td>Three (3)</td>
<td>NONE</td>
</tr>
<tr>
<td></td>
<td>O2</td>
<td>NONE</td>
</tr>
</tbody>
</table>
ASK ALL

Q24. Which ONE of the follow best describes the way you currently pay for your mobile phone service? READ OUT – SINGLE CODE ONLY

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>☐ A monthly contract</td>
<td>GO TO Q25</td>
</tr>
<tr>
<td>B</td>
<td>☐ Pay-As-You-Go (PAYG)</td>
<td>GO TO Q28</td>
</tr>
<tr>
<td>C</td>
<td>☐ A SIM-only deal</td>
<td>CLOSE</td>
</tr>
</tbody>
</table>

ASK Q25 IF MONTHLY CONTRACT AT Q24 – OTHERWISE GO TO Q28

Q25. For your current mobile phone service, do you know if you are still in contract?

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>☐ Still in contract</td>
<td>GO TO Q26</td>
</tr>
<tr>
<td>B</td>
<td>☐ Out of contract</td>
<td>GO TO Q29</td>
</tr>
<tr>
<td>C</td>
<td>☐ Not sure / no idea</td>
<td></td>
</tr>
</tbody>
</table>

Q26. How long is left to run on your contract?

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>☐ Less than a month</td>
<td>GO TO Q29</td>
</tr>
<tr>
<td>B</td>
<td>☐ 1 to 2 months</td>
<td>GO TO Q27</td>
</tr>
<tr>
<td>C</td>
<td>☐ 3 months or more</td>
<td></td>
</tr>
<tr>
<td>D</td>
<td>☐ Don’t know / can’t say</td>
<td></td>
</tr>
</tbody>
</table>

Q27. Even though you are still in contract, are you actively seeking to switch within the next 6 weeks or so?

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>☐ Yes</td>
<td>GO TO Q29</td>
</tr>
<tr>
<td>B</td>
<td>☐ No</td>
<td>CLOSE</td>
</tr>
<tr>
<td>C</td>
<td>☐ Don’t know / can’t say</td>
<td>CLOSE</td>
</tr>
</tbody>
</table>

ASK Q28 IF PAYG AT Q24

Q28. When it comes to switching your mobile phone service, do you plan to keep your mobile number / take it with you to your next provider? READ OUT – SINGLE CODE ONLY

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>☐ Yes</td>
<td>GO TO Q29</td>
</tr>
<tr>
<td>B</td>
<td>☐ No</td>
<td>CLOSE</td>
</tr>
</tbody>
</table>

Q29. Have you switched your mobile phone service to a different provider in the last five years?

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Yes</td>
<td>CONTINUE</td>
<td></td>
</tr>
<tr>
<td>☐ No</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

ASK ALL

Q30. Our study is all about the process of switching, from the very start point of you thinking about the idea of it, before actually doing anything. We’d like to invite you to participate in our study but, to do so, we would need to ask you to hold off making any contact with either your current provider or your intended new provider until we convene a focus group that we would ask you to attend. This will be on [state the date of the group]. If you are able to attend on this date, would you be willing to not do anything further until we meet with you at this group?
Switching Communications Provider: The Consumer Experience

* Please discuss the details with us so that we can determine how best to include these kinds of people, i.e., those who want to take advantage of a special offer that will end if they don’t act now.

**Q31. Do you have regular access to the Internet and email?**

<p>| | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>☐</td>
<td>Yes</td>
<td>GO TO INVITE</td>
</tr>
<tr>
<td>B</td>
<td>☐</td>
<td>No, I am not online</td>
<td></td>
</tr>
</tbody>
</table>

**INVITE**

We would like to invite you to participate in our market research study. This will involve you in the following:

- Coming along to a focus group, lasting about 75 minutes, being held on [DATE / TIME]
- Filling in a diary, in the period after this focus group, to tell us about the steps you have taken in switching your service. Full details of this would be given when we meet you at the focus group
- Coming back to a focus group, lasting about 90 minutes, which is likely to take place on a date in [TARGET WEEK]. (The exact date is to be confirmed.)

We’d be really pleased if you can take part. In return, we would offer you a total of £xx for your participation. £xx would be paid to you after the initial focus group and £xx would be paid to you at the end of the reconvened focus group.

If you are willing to take part, we really need to be sure that you can commit to all stages in the project described above. Are you willing and able to commit fully?

- YES [ ] – CHECK QUOTA – AND CONTINUE
- NO [ ] – RECORD REASON

**RECORD DETAILS – AND SEND INVITATION**

<table>
<thead>
<tr>
<th>TITLE:</th>
<th>FORENAME:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SURNAME:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ADDRESS:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>POSTCODE:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>
4.4 Locations sampled

We sampled a total of 9 locations across the four nations, ensuring a good representation of urban and rural residential areas (on the outskirts of the main urban areas). The locations and dates for the fieldwork were as follows:

**Figure 19: Locations represented in this study**

<table>
<thead>
<tr>
<th>Location</th>
<th>Stage 1 (Introduction)</th>
<th>Number of groups</th>
<th>Stage 3 (Reconvened)</th>
<th>Number of groups</th>
</tr>
</thead>
<tbody>
<tr>
<td>London (pilot)</td>
<td>24th April</td>
<td>2</td>
<td>22nd July</td>
<td>2</td>
</tr>
<tr>
<td>London</td>
<td></td>
<td></td>
<td>23rd July</td>
<td>1</td>
</tr>
<tr>
<td>Edinburgh</td>
<td>29th April</td>
<td>1</td>
<td>28th July</td>
<td>1</td>
</tr>
<tr>
<td>Glasgow</td>
<td>30th April</td>
<td>2</td>
<td>29th July</td>
<td>2</td>
</tr>
<tr>
<td>Belfast</td>
<td>1st May</td>
<td>2</td>
<td>21st August</td>
<td>2</td>
</tr>
<tr>
<td>Cardiff</td>
<td>5th May</td>
<td>2</td>
<td>31st July</td>
<td>2</td>
</tr>
<tr>
<td>Birmingham</td>
<td>6th May</td>
<td>2</td>
<td>30th July</td>
<td>2</td>
</tr>
<tr>
<td>Manchester</td>
<td>7th May</td>
<td>2</td>
<td>20th August</td>
<td>2</td>
</tr>
<tr>
<td>Peterborough</td>
<td>8th May</td>
<td>2</td>
<td>27th August</td>
<td>2</td>
</tr>
<tr>
<td>Portsmouth</td>
<td>15th May</td>
<td>2</td>
<td>28th August</td>
<td>2</td>
</tr>
<tr>
<td><strong>Totals</strong></td>
<td><strong>17</strong></td>
<td></td>
<td><strong>18</strong></td>
<td></td>
</tr>
</tbody>
</table>