UK COMMUNICATIONS PROVIDER CONSUMER SWITCHING EXPERIENCE REPORT 2015

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1. Executive Summary

1.1 Introduction
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 diary.¹
- 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.

1.0 (UK) Customer Services Analyzed – Comm. Brands

- EE Customer Service
- Sky Customer Service
- BT Customer Service
- Orange Customer Service

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 characterized 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 diarized 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 characterized 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 centre’s 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 behavior 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.

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.

In light of this duty, 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.

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-pay²), fixed broadband and digital pay TV.

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(^3) 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).
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>Talk Talk</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></td>
<td>10</td>
</tr>
<tr>
<td>Broadband online</td>
<td>5</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></td>
<td>13</td>
</tr>
<tr>
<td>Multiple services(^4)</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>5</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></td>
<td>20</td>
</tr>
<tr>
<td>Total:</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></th>
</tr>
</thead>
<tbody>
<tr>
<td>O2</td>
<td>10</td>
</tr>
<tr>
<td>Orange</td>
<td>11</td>
</tr>
<tr>
<td>Three</td>
<td>9</td>
</tr>
<tr>
<td>T-Mobile</td>
<td>11</td>
</tr>
<tr>
<td>Virgin Mobile</td>
<td>10</td>
</tr>
<tr>
<td>Vodafone</td>
<td>11</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 behavior as they occurred without prompting or ‘leading the witness’.
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
- Incentivizing 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
- **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 finalizing 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.
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

![Total Sample](n=158)

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

![Fixed landline / broadband & pay TV](n=96)

![Mobile](n=62)
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 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.

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:

- ‘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.

Figure 6: Types of ‘need’ to engage and seek resolution
### 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></td>
<td></td>
<td>Take-up of more data-hungry devices (tablets, games consoles)</td>
<td>Need for more data</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Increased film / video streaming</td>
<td></td>
<td></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></td>
<td></td>
<td>Unreliable / intermittent</td>
<td>Poor signal / coverage</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Buffering, drop out</td>
<td></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>No reward for customer loyalty</td>
<td></td>
</tr>
<tr>
<td></td>
<td>0845 numbers</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Line rental increase</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>Paying for something they don't use</td>
<td></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></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Receiving 'new customer only' offers from Current Provider</td>
<td></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></td>
<td></td>
<td>Heavy exposure, via word of mouth, advertising, consumer watchdogs, peer group pressure</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>
<tr>
<td></td>
<td></td>
<td>Poor communication / difficulty with understanding</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Impersonal treatment</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.

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.

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.
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.

### 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.

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”

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.

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, Birmingham
“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
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.

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.

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.

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.
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.

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”

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, Portosmouth

“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, Peterborough
“I can’t decide yet, until the new iPhone 6 comes out”
Femal e, 23, mobil e intend er, Ports mout h

“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”
Mal e, 28, mobil e intend er, 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”
Femal e, 24, mobil e intend er, Ports mout h

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.

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.

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.

3.6.1.1 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
“[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.

Stage 1 – Switching Comms Provider – Introduction Focus Groups

Discussion Guide – Final – 23rd April 2014

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
Final – 23rd April 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>• Who we are, what we do, our independence</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>• 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>
</tbody>
</table>

2. PARTICIPANT INTRODUCTION

Go around the table, one at a time . . .

- Work (If relevant)
- Home, family (household composition)
- Interests
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 gained 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 16, fixed broadband and digital pay TV.

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>Welcome back and thanks for their diary participation</td>
</tr>
<tr>
<td></td>
<td>Explain the purpose of re-convening, i.e., to learn in detail about the ‘journey’ that they have made</td>
</tr>
<tr>
<td></td>
<td>Remind them about our neutrality – not here to make judgments about whether they switched or not.</td>
</tr>
<tr>
<td></td>
<td>Remind about audio and video recording</td>
</tr>
<tr>
<td><strong>2. PARTICIPANT INTRODUCTION</strong></td>
<td>Quick recap on the start and end point of their journey, to capture individual differences from the outset</td>
</tr>
<tr>
<td></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></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></td>
<td>Go around the table, one at a time and get a brief summary of the start and end point of their journey . . .</td>
</tr>
<tr>
<td></td>
<td>• What they planned to do, at the outset</td>
</tr>
<tr>
<td></td>
<td>• What their main reason or trigger was for wanting to switch in the first place?</td>
</tr>
<tr>
<td></td>
<td>• What the final outcome was (switched? Not switched? Still in the reviewing finances, end of contract, saw a better deal, etc.)</td>
</tr>
<tr>
<td></td>
<td>• Overall level of satisfaction with their experience (mark out of 10)</td>
</tr>
<tr>
<td></td>
<td>• Comparison with expectations (at the outset)</td>
</tr>
<tr>
<td><strong>3. IDENTIFY THE KEY STEPS IN THEIR JOURNEY</strong></td>
<td>Identifying the steps that participants took in their journey, and assessing the relative impact they had on the outcome</td>
</tr>
<tr>
<td></td>
<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.</td>
</tr>
<tr>
<td></td>
<td>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>
</tr>
<tr>
<td></td>
<td>Explore the list as a whole (at a high level) . . .</td>
</tr>
<tr>
<td></td>
<td>• Why ‘this’ step first (for some / all of you)?</td>
</tr>
<tr>
<td></td>
<td>• Why not ‘this’ step first (for others)?</td>
</tr>
<tr>
<td></td>
<td>• Which step(s) were most ‘important’? Why?</td>
</tr>
<tr>
<td></td>
<td>• Which steps were ‘easy’? Why? In what way?</td>
</tr>
<tr>
<td></td>
<td>• Which steps were more ‘difficult’? Why? In what way?</td>
</tr>
<tr>
<td></td>
<td>• Time spent on each step, and between each step? Explore</td>
</tr>
<tr>
<td></td>
<td>Identifying the steps that participants took in their journey, and assessing the relative impact they had on the outcome</td>
</tr>
<tr>
<td></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></td>
<td>• What language they use to describe them</td>
</tr>
<tr>
<td></td>
<td>• How relevant they are to whom, and why</td>
</tr>
<tr>
<td></td>
<td>• ‘Pain’ points that inhibited or prevented progress</td>
</tr>
<tr>
<td></td>
<td>• ‘Enabling’ points that facilitated the journey</td>
</tr>
<tr>
<td></td>
<td>• Etc.</td>
</tr>
<tr>
<td></td>
<td>Overall, in this section, we want to identify different patterns and approaches, in the steps</td>
</tr>
</tbody>
</table>
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>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>Fixed line only</td>
<td>BT</td>
<td>4</td>
<td>4</td>
<td>GPL NoT or C&amp;R</td>
</tr>
<tr>
<td></td>
<td>Sky</td>
<td>4</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td></td>
<td>TalkTalk</td>
<td>4</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Virgin Media</td>
<td>0</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Fixed broadband only</td>
<td>BT</td>
<td>5</td>
<td>3</td>
<td>GPL NoT or C&amp;R</td>
</tr>
<tr>
<td></td>
<td>Sky</td>
<td>4</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td></td>
<td>TalkTalk</td>
<td>5</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Virgin Media</td>
<td>6</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Orange</td>
<td>8</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Pay TV only</td>
<td>BT</td>
<td>2</td>
<td>4</td>
<td>C&amp;R</td>
</tr>
<tr>
<td></td>
<td>Sky</td>
<td>4</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td></td>
<td>TalkTalk</td>
<td>2</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Virgin Media</td>
<td>6</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Multiple services</td>
<td></td>
<td>0</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Fixed line &amp; broadband</td>
<td>BT</td>
<td>5</td>
<td>9</td>
<td>GPL NoT or C&amp;R</td>
</tr>
<tr>
<td></td>
<td>Sky</td>
<td>3</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td></td>
<td>TalkTalk</td>
<td>6</td>
<td>9</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Virgin Media</td>
<td>3</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Orange</td>
<td>7</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>Fixed line, broadband &amp; Pay TV</td>
<td>BT</td>
<td>2</td>
<td>2</td>
<td>Mix of GPL NoT and C&amp;R</td>
</tr>
<tr>
<td></td>
<td>Sky</td>
<td>4</td>
<td>7</td>
<td></td>
</tr>
<tr>
<td></td>
<td>TalkTalk</td>
<td>2</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Virgin Media</td>
<td>4</td>
<td>8</td>
<td></td>
</tr>
</tbody>
</table>

|                      | Fixed line only   | 90           | 96           |                            |
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></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><strong>Total</strong></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 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.
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...

1. (i) out of contract, or (ii) nearing the end of their contract and actively looking to switch one or more of their communications services to a different provider
2. Not looking to switch their provider because they are moving house
3. The principal or joint decision maker for telecoms services (used personally) and / or installed in the home
4. 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 . . .

**Fixed line, broadband and pay TV group compositions:**

<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=2</td>
<td>n=8</td>
</tr>
<tr>
<td>Group 2:</td>
<td>n=2</td>
<td>n=2</td>
<td>n=2</td>
<td>n=4</td>
<td></td>
<td>n=8</td>
</tr>
<tr>
<td>Group 3:</td>
<td>n=2</td>
<td>n=2</td>
<td>n=2</td>
<td></td>
<td></td>
<td>n=8</td>
</tr>
<tr>
<td>Group 4:</td>
<td>n=4</td>
<td>n=4</td>
<td>n=4</td>
<td></td>
<td></td>
<td>n=8</td>
</tr>
<tr>
<td>Group 5:</td>
<td>n=2</td>
<td>n=2</td>
<td>n=2</td>
<td>n=2</td>
<td></td>
<td>n=8</td>
</tr>
<tr>
<td>Group 6:</td>
<td>n=4</td>
<td>n=4</td>
<td>n=4</td>
<td></td>
<td></td>
<td>n=8</td>
</tr>
<tr>
<td>Group 7:</td>
<td>n=2</td>
<td>n=2</td>
<td>n=2</td>
<td>n=3</td>
<td></td>
<td>n=9</td>
</tr>
<tr>
<td>Group 8:</td>
<td>n=4</td>
<td>n=4</td>
<td>n=4</td>
<td></td>
<td></td>
<td>n=8</td>
</tr>
<tr>
<td>Group 9:</td>
<td>n=2</td>
<td>n=2</td>
<td>n=2</td>
<td>n=3</td>
<td></td>
<td>n=9</td>
</tr>
<tr>
<td>Group 10:</td>
<td>n=4</td>
<td>n=3</td>
<td>n=3</td>
<td>n=3</td>
<td></td>
<td>n=10</td>
</tr>
<tr>
<td>Group 11:</td>
<td>n=4</td>
<td>n=2</td>
<td>n=2</td>
<td>n=2</td>
<td></td>
<td>n=8</td>
</tr>
<tr>
<td></td>
<td>12</td>
<td>28</td>
<td>14</td>
<td>22</td>
<td>12</td>
<td>90</td>
</tr>
</tbody>
</table>

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.

**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>n=3</td>
<td>10</td>
</tr>
<tr>
<td>Group 2:</td>
<td>n=3</td>
<td>n=3</td>
<td>n=3</td>
<td>n=4</td>
<td></td>
<td>n=3</td>
<td>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>n=3</td>
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**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.

Contact EE: EE Customer Service
Contact Sky: Sky Customer Service
Contact BT: BT Customer Service