# Technical report – Customer Satisfaction Tracker 2024 (Nov-Dec)

## Preface

Since 2010, Ofcom has been tracking levels of customer satisfaction among users of telecommunications services; and, since 2017, this has been carried out via the Customer Satisfaction Tracker ("CST"). In previous waves of the CST the data was collected through an initial face-to-face study, followed by a smaller online survey to boost the sample where necessary. Prior to 2020, the research was conducted via a face to face omnibus. However in November 2020 following the advent of the coronavirus pandemic and the associated restrictions, we moved to an online methodology which we continue to use. More information on the previous wave's approach and methodology can be found here.

## Data Comparability and Limitations

Whilst the YonderLive panel has been carefully built to ensure that it remains demographically balanced, this survey does not capture the views of the offline population who do not have access to the internet and therefore results are skewed to those who are online.

It is also important to acknowledge any potential behavioural differences that a respondent might exhibit when completing a survey face to face versus completing a survey online. In particular, it is known that online panels can result in fewer responses in the top satisfaction/agreement category.

Due to the change in methodology in 2020 (from face to face to online) we cannot compare these data to those from waves prior to 2020. While the current reporting focuses on difference between 2022 and 2024, the data from this wave can also be compared to that from 2020 and 2021.

## Study Objectives

This wave of the CST is run by Yonder Consulting on behalf of Ofcom. The objective of the survey is to track and understand the attitudes of residential consumers to the quality of service they receive for each specific telecommunications service or product they are a decision maker for within the household. It focuses specifically on levels of satisfaction with aspects of their service across the four key communication markets (landline, mobile, fixed broadband and pay TV). The study is designed to report on satisfaction at an overall level per market and by provider within market, where a provider has a market share of at least 4%. In the 2022 survey, Vodafone was added as a landline provider and Sky as a mobile provider. In the 2024 survey, Virgin Mobile was removed from the mobile provider list as they are now part of O2. Lebara was also added as a mobile provider. The providers on the pay TV list was updated to reflect the rebrand of BT TV to EE TV, which can be purchased through both BT and EE.

In the current study, Yonder interviewed a quota sample of 2,585 adults adults aged 16+ via it's own online research panel. The online interviews consisted of 2,437 'main sample' interviews and 148 'boost' interviews. The 'boost' interviews, were conducted with customers of those providers where fewer than 100 interviews were achieved in the initial round of 'main sample' surveys.

All interviews were conducted between the 18th of November and the 29th November 2024.

Questions were asked upfront to establish household ownership of landline, mobile phone, fixed broadband and pay TV. For each of these services the questionnaire established that the respondent is the decision maker for that service and also whether any of the households' communications services are taken from the same provider. Analysis was conducted by each total market i.e. fixed line, mobile, fixed broadband, pay TV and those purchasing services as a bundle. On completion of the interviews, weighting was applied for each market section (i.e. each of the above markets) of the survey using profiles from Ofcom's Technology Tracker Survey.

Details of the sampling frame, research methodology, and weighting procedures are outlined in the following pages. A note on statistical reliability is also included in the final section of this document.

## Sample Design
### Quotas
Nationally representrative quotas were used in the current study to closely represent the UK population. Quotas were set using latest ONS Census data (2021/22).

- Age (16-24, 25-34, 35-44, 45-54, 55-64, 65+)
- Socio-economic grade (SEG)
- Gender

### Fieldwork
An online survey was conducted using Yonder's online panel (YonderLive) to reach adults aged 16+. YonderLive is made up of 150,000 members across the UK. For the 'main sample' online interviews with interlocking quotas were set to be broadly representative of UK internet users based on gender within age bands; with further quotas set based on household socio-economic group and nation. For the 'boost' interviews no specific quotas were set. The sole criteria for inclusion for these 'boost' interviews was being a customer of any service provider, typically from one of the smaller communications providers, where fewer than 100 interviews had been conducted in the initial 'main sample' survey's. These providers were:

- Landline: EE, Plusnet and Vodafone
- Broadband: EE and Plusnet
- Mobile: Giffgaff and Sky
- Pay TV: BT and TalkTalk

### Weighting
The data from the 'main sample' and 'boost' online surveys has been combined and weighted in total. The weighting plan is to weight to targets by age, gender, and SEG to a nationally representative scheme of the UK population. Any discrepancy between the final achieved sample and the known profile of the UK was adjusted by RIM[1] weighting, using the known demographic profile of the population. The current study used the latest ONS Census data (2021/22). Market share data was also used to weight services used by market (i.e. Landline, Mobile, Fixed broadband, and Pay TV) and by communication providers with 4% or more market share. All other communication providers with a consistent market share of less than 4% or that were spontaneously mentioned by participants were combined to create an "other communication providers" variable per market.

The overall weighting was extremely efficient with the relationship between effective and unweighted samples at 76.8% for all four services.

[1]Random Iterative Method. RIM weighting is a form of survey weighing to accurately showcase demographics among a population or customer base.  RIM weighting allows each variable and question to be weighed as an individual entity to assure each data point and demographic is accurately represented. Rim weighting is used when there are a number of weighting variables but the inter-relationship between them is not know. It tries to change the weights of each weighting variable as little as possible while interpolating these relationships.

## Guide to Statistical Reliability

The variation between the sample results and the "true" values (the findings that would have been obtained if every telecoms customer had been interviewed) can be predicted from the sample sizes on which the results are based, and on the number of times that a particular answer is given. The confidence with which we can make this prediction is usually chosen to be 95%, that is, the chances are 95 in 100 that the "true" values will fall within a specified range. However, as the sample is weighted, we need to use the effective sample size[1] (ESS) rather than actual sample size to judge the accuracy of results. The following table compares ESS and actual samples for some of the main groups across all respondents.

1 Effective Sample Size shown as Effective Weighted Sample in the data tables produced

|  | ACTUAL | ESS |
|---|---|---|
| TOTAL | 2585 | 1986 |
| GENDER: Male | 1238 | 950 |
| GENDER: Female | 1338 | 1028 |
| AGE: 16-17 | 5 | 5 |
| AGE: 18-24 | 324 | 256 |
| AGE: 25-34 | 472 | 369 |
| AGE: 35-44 | 378 | 299 |
| AGE: 45-54 | 333 | 271 |
| AGE: 55-64 | 409 | 326 |
| AGE: 65+ | 664 | 478 |
| SEG: AB | 500 | 427 |
| SEG: C1 | 804 | 619 |
| SEG: C2 | 562 | 449 |
| SEG: DE | 657 | 511 |

Throughout the report, where it is possible to do so, statistically significant differences are flagged over time, these are applied at the 95% confidence level for comparisons within the year and 99% confidence level between 2022 and 2024.

## Net Promoter Score (NPS)

All data tables that show responses to questions on whether or not a respondent would recommend a particular service include two metrics called the net promotor and negative promoter score. Respondents are asked how likely they are, on a scale of 1-10, to recommend a service provider with, 10 being extremely likely and 0 extremely unlikely. Based on their scores, respondents are classified into one of three groups.

| CLASSIFICATION | SCORE | HYPOTHETICAL |
|---|---|---|
| Promoter | 9 to 10 | 50% |
| Passive | 7 to 8 | 25% |
| Detractor | 0 to 6 | 25% |

A (positive) net promoter score is the percentage of respondents who promote a service provider minus the percentage who do not recommend/detract a service provider. Hypothetically, this is 50-25% to give 25%
A negative net promoter score is the percentage who detract a service provider minus the percentage who promote. Hypothetically, this would be 25%-50% to give -25%.

Therefore, the two rows in each NPS data table should then be interpreted as follows:

- If either row demonstrates a significant difference, then this can be interpreted as a significant difference
- If neither row demonstrates a significant difference, this this can be interpreted as not being statistically significant

These were both created to ensure that when comparing two operators, if one is significantly more recommend over another, we see a true difference and reduce the likelihood of seeing data artifact.