

Preface

The Switching Tracker study has been run by Critical Research on behalf of Ofcom.

The Switching Tracker is Ofcom's key data source on switching levels, attitudes and experiences across the communications markets (fixed, mobile, fixed broadband and multi-channel/Pay TV). Since 2010 Ofcom has run this tracking study annually among UK adults (screening for decision makers in each market) to measure participation levels, switching incidence and ease of switching in each market.

Up to and including 2014, this study was conducted by telephone, using random digit dialling to mobile and landline numbers. In 2015 the fieldwork was shared between telephone interviewing and face-to-face interviewing. From 2016 onwards all of the fieldwork has been conducted face-to-face in home using CAPI (Computer Assisted Personal Interviewing).

Quadrangle Operations interviewed a quota sample of 2,601 adults, aged 16+, in the UK. Interviews were carried out across 200 different sampling points in the UK, face-to-face, inhome. All interviews were conducted between 30th August and 30th September 2018.

Questions are asked up front to establish household ownership of landline, fixed broadband, TV service and mobile. For each service, it is established whether the respondent is the decision maker – with detailed questions asked for each market sector that the respondent is the decision maker for, covering both individual/ standalone services and services that are part of a package/ bundle.

The 2018 survey saw a new approach to defining bundles or packages of services: so that the detailed questions referred to bundled services only if this matched how respondent regarded their services. The detailed questions otherwise referred to the individual services if this is how they were regarded by the respondent.

To achieve this, the survey first established which provider was used for each of the services the respondent was the decision maker for. Those using the same provider for two or more of these services were asked to say whether they regard these services from the same provider as a package of services or as individual services. Those with three or four services from the same provider could respond that they regarded some but not all services from the same provider to be a package of services, then establishing which particular services were regarded as a package or as individual services if necessary.

The data tables show both definitions for bundled services: 'Simple bundle' where the same provider is used for more than one of the services and 'Regard bundle' where the decision maker regards services from the same provider to be a package of services rather than individual services. More details are shown on an example on the following page.

The following example refers to weighted data shown in the data tables.

Of the 978 decision makers for landline (see Q3), 838 use their landline provider for any other services (see Q7A/Q7B), so the remaining 140 landline decision makers do not use their landline provider for any other services. The cross-break labelled LANDLINE – SIMPLE shows 140 as STANDALONE and 838 as SIMPLE BUNDLE.

Those using their landline provider for any other services are asked Q8A or (if they have two pairs of bundles) Q8B to establish whether they regard these services to be a package of services or individual services. Of the 838 who use their landline for any other services, 786 regard these as a package of services (see Q9A/Q9B), with the remaining 52 decision makers consider landline to be a standalone service. Adding these 52 to the 140 who don't use their landline provider for any other services, the total number of decision makers who regard landline to be a standalone service is therefore 192. The cross-break labelled LANDLINE – REGARD shows 192 as STANDALONE and 786 as REGARD BUNDLE.

Please note – the data tables have some gaps in the sequence of table numbers shown for the service-specific questions from Q11. No questions are missing. The gaps in the sequence are because the questions that don't apply for a particular service (e.g. apply to landline only) are skipped for other services and the table numbers also skip as a result.

Updates to the 2018 survey meant also accommodated two pairs of packages or bundles: where one provider was used for two of the four possible services and a second provider was used for the other two services. In previous surveys, decision makers with two pairs of bundled services would have been asked to respond about the main package/ the one their household spends more on each month. With this updated approach in 2018, 5 of the 2601 interviews were conducted with decision makers with two pairs of services from two providers.

Analysis is conducted by each total market i.e. fixed line, mobile, fixed broadband, digital TV, allowing comparisons to be made between those who consider the service to be standalone and those who consider the service to be part of a package or bundle. On completion of the interviews, weighting is 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 this document. A note on statistical reliability is also included.

Sample Design

To ensure consistency with trend data, the sample approach to sampling has been used as in previous waves, using Output Areas (OAs) as the basic building block for sampling, then using quota control by three key variables (age, gender and SEG) to control the sample interviewed within each sampling point.

First Stage

The OAs in the UK were grouped into sampling units (SUs), which were then stratified by region and rural/urban:

- firstly, all the SUs were sorted by region,
- the SUs were then sorted within region by rural/urban.

This approach controls the urban/ rural fallout of the sample, so no further quota is imposed. The sample extracted was checked for close correspondence to the UK population on two key variables:

- Deprivation Index for the United Kingdom.
- Cable/ non-cabled area

Since region has been used as the first sorting variable, regional distribution of SUs will be more or less in proportion to the number of residential addresses in each region.

Second stage

The size of a SU is measured by the number of addresses it contains. The SUs were selected with a probability proportionate to size. This ensures that all households within an SU have an equal chance of being selected, regardless of the size of the SU in which a household is situated. The number of interviews per SU was 13.

Quotas

The following quotas were set (within each SU) to represent the population within that SU, which means the overall quotas across the UK will closely match the UK population. Quotas were set using 2011 Census data for Great Britain and Northern Ireland.

- Age (16-24, 25-44, 45-64, 65-74, 75+)
- Socio-economic grade (SEG)
- Gender

Fieldwork

Interviewers were provided with specific addresses. The average SU contains around 130 households in England and Wales and 160 households in Scotland and Northern Ireland, thus affording tight control over the addresses the interviewers called at.

Reporting

The sample is drawn on the basis of households within SUs, while quotas are set on the basis of adult population profiles. The data is then weighted to the profile of UK adults per market sector and so the data is representative of adults aged 16+ who are decision makers for that market.

Weighting

The data are weighted to the profile for each market sector using target rim weights for age, gender and socio-economic group (SEG).

The profiles used to weight the data within each market sector are taken from Ofcom's Technology Tracker; which uses the 2011 Census for the targets used to weight on age, gender and location, while SEG profiles come from NRS published data.

The '% Unweighted' column shows the actual percentage of interviews achieved in the 2018 Switching Tracker fieldwork across all respondents.

The following table shows the initial unweighted sample across all respondents and the final weighted sample profile across all respondents.

Figures are based on UK adult decision makers	% Weighted	% Unweighted
	Profile	Interviews achieved
Gender – Male 16+	50%	48%
Gender – Female 16+	50%	52%
Age – 16-34	33%	29%
Age – 35-54	36%	34%
Age – 55+	31%	37%
SEG – AB	26%	22%
SEG – C1	30%	31%
SEG – C2	17%	21%
SEG – DE	27%	25%
Region – England	84%	84%
Region – Scotland	9%	9%
Region – Wales	5%	5%
Region – Northern Ireland	2%	2%

Guide to Statistical Reliability

The variation between the sample results and the “true” values (the findings that would have been obtained if everyone 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 size¹ (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.

	Actual	ESS
Total	2,601	2,321
URBANITY: URBAN	2,256	2,017
URBANITY: RURAL	345	306
GENDER: MALE	1,239	1,103
GENDER: FEMALE	1,362	1,224
AGE: 16-34	745	685
AGE: 35-54	877	792
AGE: 55+	974	876
SEG: AB	583	543
SEG: C1	818	744
SEG: C2	547	491
SEG: DE	653	572

The table below illustrates the required ranges for different sample sizes and percentage results at the “95% confidence interval”:

Approximate sampling tolerances applicable to percentages at or near these levels

Effective sample size	10% or	20% or	30% or	40% or	50%
	90%	80%	70%	60%	
	±	±	±	±	±
2,321 (Total)	1.3%	1.7%	1.9%	2.0%	2.1%
1,103 (GENDER: MALE)	1.8%	2.4%	2.8%	3.0%	3.0%
744 (SEG - C1)	2.3%	2.9%	3.4%	3.6%	3.7%
306 (URBANITY: RURAL)	3.4%	4.6%	5.2%	5.6%	5.7%

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

For example, if 30% or 70% of a sample of 2,321 gives a particular answer, the chances are 95 in 100 that the “true” value will fall within the range of ± 1.9 percentage points from the sample results.

When results are compared between separate groups within a sample, different results may be obtained. The difference may be “real”, or it may occur by chance (because not everyone has been interviewed). To test if the difference is a real one – i.e. if it is “statistically significant” – we again have to know the size of the samples, the percentages giving a certain answer and the degree of confidence chosen. If we assume “95% confidence interval”, the difference between two sample results must be greater than the values given in the table below to be significant:

Differences required for significant at or near these percentages

Sample sizes being compared	10% or 90% ±	20% or 80% ±	30% or 70% ±	40% or 60% ±	50% ±
1,103 vs. 1,224 (Male vs. Female)	2.4%	3.3%	3.7%	4.0%	4.1%
543 vs. 744 (SEG AB vs. C1)	3.3%	4.4%	5.1%	5.4%	5.5%