

Ofcom Triple Play Switching Quantitative Research: Technical Report

Preface

This volume contains detail of the sampling and weighting for the Ofcom Triple Play Switching Quantitative Research undertaken in 2015 by BDRC Continental on behalf of Ofcom.

It is important for consumers to be able to switch providers easily in order to exercise their choice and take advantage of competition in the communications sector.

This research was carried out in order to assess the current consumer experience when switching or considering switching one or more of fixed line telephony, fixed line broadband or pay TV provider.

Fieldwork took place from 22nd October to 16th November 2015 via an online panel with an overall sample of 2,529.

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1.1 Sample design

Quotas

Quotas were set to ensure minimum numbers of specific subgroups for analysis.

For all **switching** sample groups the switch had to have taken place in the past 2 years and none of the following could apply:

- Switched at the same time as moving home
- Did not choose to switch, but was a customer of Virgin Media National (i.e. not Virgin Media's cable service) and they moved their service to TalkTalk
- Had to get a code from their previous broadband provider and give it to their new broadband provider, i.e. a MAC (Migration Authorisation Code)

Cross Platform Switchers (CPS) switched to or from a Virgin triple play or dual play package; or from Sky Triple to Openreach; or to/from Virgin/Sky standalone Pay TV.

Openreach switchers (ORS) switched a triple play or dual play package to and from a provider on the Openreach network (includes switching to/from Sky Dual and from Openreach to Sky Triple).

All **non-switching** sample groups had to have **Triple Play** (fixed landline, fixed broadband and Pay TV services with the same provider), **Dual Play** (fixed landline and fixed broadband services with the same provider) or **Standalone Pay TV** (a Pay TV service with a provider from which they subscribe to no other services) packages.

The following table shows the targets and the number of interviews achieved for each sample group.

Sample group	Sample definition	Interviews	
		Target	Achieved
PTV Standalone switch (CPS) i.e. switched their PTV service to and/or from a standalone service	• Switched PTV service <u>from</u> PTV standalone to PTV standalone or <u>from</u> Triple Play <u>to</u> PTV standalone or <u>to</u> Triple <u>from</u> PTV standalone and switched <u>to/from</u> Virgin or <u>to/from</u> Sky ¹	150	158
Triple Play to Triple Play switch	• Triple Play package <i>currently</i> and switched <u>from</u> another Triple Play package and	400	300

¹ A PTV switch to/from Sky has been classified as a cross platform switch

(CPS) i.e. had PTV, fixed landline and fixed broadband with the same provider and switched all three together to another provider at the same time.	switched <u>to/from</u> Virgin or switched <u>from</u> Sky ²		
Dual Play switch (CPS) i.e. switched fixed landline and fixed broadband at the same time <u>to</u> and/or <u>from</u> the same provider.	<ul style="list-style-type: none"> Dual Play package currently (i.e. fixed landline & fixed broadband) and switched <u>from</u> another Dual Play package or switched <u>to/from</u> standalone service/s to/from Dual or switched <u>to/from</u> a Triple Play package to/from Dual and switched <u>to</u> or <u>from</u> Virgin 	150	223
Triple Play to Triple Play switch (ORS) i.e. had PTV, fixed landline and fixed broadband with the same provider and switched all three together to another provider at the same time.	<ul style="list-style-type: none"> Triple Play package currently with any Openreach provider (<i>including</i> Sky) and switched <u>from</u> another Triple Play package with any Openreach provider (<i>excluding</i> Sky³) 	150	154
Dual Play switch (ORS) i.e. switched fixed landline and fixed broadband at the same time <u>to</u> and/or <u>from</u> the same provider.	<ul style="list-style-type: none"> Dual Play package currently (fixed landline & fixed broadband) and switched <u>from</u> another Dual Play package or <u>to/from</u> standalone service/s to/from Dual or <u>to/from</u> a Triple Play package to/from Dual and switched <u>to</u> and <u>from</u> any Openreach provider (i.e. does not include any Virgin switches) 	150	297
Decided not to (DNT)	<ul style="list-style-type: none"> Considered and actively started looking at changing provider in the last 12 months but decided not to 	650	699
Not switched/ Not actively considered (NS/NAC)	<ul style="list-style-type: none"> Considered changing provider in the last 12 months, but did not start looking and decided not to change provider or have not considered changing provider in the last 12 months 	650	698

² A triple play switch from Sky has been classified as a cross platform switch

³ A switch to Sky triple has been classified as ORS as we expect switchers to follow a gaining provider led process, which is more aligned with an ORS

1.2 Weighting

The profile of respondents in the sample groups was compared to data collected from a nationally representative face-to-face omnibus survey. The Not switched/ Not actively considered (NS/NAC) sample group was found to diverge from the face-to-face sample on key demographic and attitudinal measures and was therefore weighted to match the face to face profile on these. The other samples are reported unweighted.

Figures are based on UK adults classified as Not switched/ Not actively considered (NS/NAC)	% Unweighted	% Weighted
Male	45.3%	50.0%
Female	54.7%	50.0%
16-24	7.3%	12.0%
25-34	9.6%	16.0%
35-44	16.2%	17.0%
45-54	15.8%	21.0%
55-64	18.5%	17.0%
65+	32.7%	17.0%
ABC1	61.5%	54.0%
C2DE	38.5%	46.0%
<i>I try to keep up with technology</i>		
Agree strongly	24.8%	30.0%
Agree slightly	43.0%	39.0%
Neither agree nor disagree	17.8%	8.0%
Disagree slightly	10.2%	13.0%
Disagree strongly	4.3%	10.0%
<i>My friends tend to come to me if they have questions about technology</i>		
Agree strongly	7.6%	15.0%
Agree slightly	23.5%	20.0%
Neither agree nor disagree	25.4%	9.0%
Disagree slightly	20.6%	22.0%
Disagree strongly	22.9%	34.0%
<i>I'm as knowledgeable about these technologies as the next person</i>		
Agree strongly	12.9%	22.0%
Agree slightly	36.0%	35.0%
Neither agree nor disagree	29.4%	14.0%
Disagree slightly	13.0%	17.0%
Disagree strongly	8.7%	12.0%

The percentages described above as '% Weighted' are the targets used to weight the data. The figures for gender, age, socio-economic group (SEG) and attitudinal measures are taken from the nationally representative face-to-face omnibus survey carried out separately. The '% Unweighted' column shows the actual percentage of interviews achieved.