
Ofcom Switching Tracker

Notification of changes for 2020

Overview

This document confirms the changes to Ofcom's Switching Tracker in light of the ongoing situation surrounding the Covid-19 pandemic and current guidelines in place, that have led to Ofcom's decision to suspend all face-to-face fieldwork to protect the safety of everyone involved. We have also made changes this year in order to improve the flow of the interview and to remove questions that are no longer useful.

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 dialing 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).

However, the change in methodology means that we may not be able to compare trend data to previous years. We will be evaluating the extent of this once fieldwork is complete.

Confirmed changes – in brief

- Conduct the survey online and via post-to-web and post-to-phone in place of the existing face-to-face format.
- A letter will be posted out to the general UK population inviting adults aged 16+ to complete an online or telephone survey.
- Responses will be topped up via an online panel.
- We will ask for referrals to people without access to the internet from people who complete the survey online.
- We may not be able to compare trend data due to the change in methodology.
- We have edited the questionnaire to improve the flow of the interview and removed questions that are no longer useful, and collect information related to developments in particular sectors.

If you have any queries please email market.research@ofcom.org.uk

Confirmed changes to the Switching Tracker 2020

Methodology

The existing methodology of face to face fieldwork will not be conducted in 2020, due to the Covid-19 pandemic. Instead, we will conduct our survey via post-to-web, post-to-phone and online panels.

- a) A letter will be sent out to a sample of UK households, and one member of the household, who is responsible for at least some communications services, will be invited to complete the survey online or via telephone, depending on their preference.
- b) In addition, we will also top up this group with a sample of people from online panels.
- c) We will also ask for referrals from people who complete the survey online to friends or family who do not have the internet, to boost our sample of landline only consumers.
- d) We have already trialled the questionnaire online and via post, to ensure it is fit for purpose, and to assess how these samples might differ from the face to face sample we have previously used.

Questions removed

We will remove the below questions from the tracker for the 2020 wave onwards. Please note that the question numbers refer to the 2019 questionnaire.

- Q6F-I- we are proposing changing the way we ask this question in order to make for a more user-friendly experience for the respondent. Please see detail at 2.4, point d, for our replacement set of questions.
- Q11- we have merged Q11 with Q12 to simplify the questions, asking about landline use all in one question.
- Q17B and Q17C are to be removed as they are now surplus to requirements.
- Q19 - removed as now surplus to requirements.
- Q30- we have added a question for switchers to ask who their previous provider was (at Q28A-C and at Q32 for TV), and so this question is now not needed, as it will likely be more confusing for respondents. Instead, question Q34AA has been added in.
- Q32 -removed as this is now covered at Q28A-D.
- Q34A and Q34B- removing these questions as they are now surplus to requirements.
- C5- removed as now surplus to requirements.

Questions amended

The below are a list of questions we have amended for 2020, in order to improve the flow of the questionnaire, and to collect some new information this year, based on developments in the relevant sectors.

- C6A- this has been edited to be in line with the new Ofcom standard for asking about educational background.
- OS6 – an amended version of the current question (S6) which asks about the occupation of the main wage earner in the household; edited to reflect the change in methodology, (i.e. self-completion as opposed to a longer set of interviewer-administered questions). The original question will be asked of any who completes a telephone interview.
- S7- employment questions edited to take account of people who may have been furloughed as a result of the Covid-19 pandemic.
- S9- asking respondents upfront if they have moved home in the last 12 months to enable better understanding of respondents' circumstances.
- Q1 and Q3- adapted the phrasing to ask about the TV service to make more specific to broadcast television to prevent confusion for respondents.
- Q5 and Q6- extra codes (ALL4+, Apple TV+, Britbox, Disney + and Eurosport Player) added in to take account of changes in the marketplace.
- Q4B- extra code added in to take account of people who are only using on-demand services or using only a streaming platform such as Chromecast or Amazon Fire stick.
- Q15- extra codes added in to enable us to gather more granular detail on mobile phone deals and make the question more user friendly.
- Q33A and Q33B- we have changed the time frame from 6 months to 12 months for 2020. We have also made it clearer that the notification could be from a previous provider if they have switched in the last 12 months. Q33B also focuses on what they did when they received this, if anything, and also accounts for the fact people may have switched as a result.

New questions added

We will add some new questions in 2020. Some are to help measure the impact of specific developments, others are to replace some of the questions removed, and a few are to help understand more about the profile of the samples, to help with weighting and assessments of comparability with previous waves following the conclusion of fieldwork.

- OS1A, OS1B- we need to ask these of respondents now rather than this information being already populated by the interviewer.
- S8- a new question asking about how many hours spent using the internet in a typical week, which will be useful to help us align respondents across different interview methods.
- Q18A- we have added a new question asking when people first had broadband at home, to help us capture extra detail on the take-up of these services.
- Q28A-D, Q29B and Q29C- we have kept our key switching question (Q28) the same, but we have decided to alter the way we ask some of the more detailed questions, and the location of some of these questions in the questionnaire in order to simplify the experience for the respondent.

Switching Tracker 2020 Confirmed Changes

- Q32A-F– these have all been added in to gather more data on the mobile switching process.
- Q34con- this question has been added to obtain more information on opinions of communication services deals.
- Q34AA and Q34AB-AE- these questions have been added in order to capture any slimmed down packages to give a more complete picture of the types of changes people are making to their communication services.
- Q34AF- a new question to help understand whether people have dropped services in the last 12 months.
- Q37- a group of attitudinal questions have been added in to help to further assess the profile of the respondents, given the shift to a different methodology.
- Q38 and Q39A-C – these have been added in to help assess the profile of the respondents, given the shift to a different methodology.
- C6B- a question designed to understand whether people’s household financial situation has changed since the advent of social distancing.