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## **Ofcom's Technology Tracker**

Notification of changes to the 2021 survey

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# 1. Overview

Due to the ongoing situation surrounding the Covid-19 pandemic and current guidelines that are in place, Ofcom has made the decision to suspend all face-to-face fieldwork across all consumer research projects to protect the safety of everyone involved. Ofcom's Technology Tracker is affected by this decision. This document sets out our proposed alternative methodology and the impact this will have on 2021 data.

## Background to survey

The Technology Tracker provides us with continuous understanding of consumer attitudes and behaviour in the UK communications markets (fixed and mobile telecoms, internet, multichannel TV, on-demand services, and radio/audio) among adults aged 16+. The data helps us to monitor change and assess the degree and success of market competition.

## Methodology

Up until this year, the methodology used for this survey was face-to-face interviews in the home with the participants, carried out once a year (January-February) with around 3,900 adults. The outbreak of Covid-19 has prevented the face-to-face methodology from continuing for the foreseeable future.

Next year's survey, with fieldwork to be conducted in January-March 2021 and data published in May-June 2021, will therefore be conducted online as well as via post as an attempt to capture the views of consumers who do not go online. In addition, we may also ask a small subset of questions via a telephone omnibus to ensure offline consumers are included.

This new methodology means that changes will need to be made to the questionnaire in order to adapt the survey. This consultation document provides details of the proposed changes and we invite stakeholders to feedback their views on these.

In addition to the changes we make in order to adapt the survey to the new methodology, we will also make changes as part of a standard yearly review to ensure the survey remains fit for purpose.

## Impact on 2020 data

As an official statistic, this survey provides trend data. However, the change in methodology means that we will not be able to directly compare trend data to previous years, although we hope to be able to make meaningful indicative comparisons.

## What we are proposing – in brief

We propose to make the following changes to the survey:

- Conduct the survey online and via post in place of the existing face-to-face format.
- A letter will be posted out to c.22,500 households among the general UK population inviting adults aged 16+ to complete an online survey.
- Alternatively, they will have the option of calling an 0800 freephone number to request a paper questionnaire to complete and return. The paper version of the survey that will focus on the non-internet user questions as we aim to capture the offline audience as well.
- If we find that we have significantly fewer responses via the new methodology compared to previous years, we may top up the sample via an online panel if needed.
- The questionnaire length needs to be reduced to maintain respondent engagement in online/paper surveys.
- For questions that remain, the wording may be amended to be adapted to an online/paper format and to be appropriate for self-completion.
- We will not be able to directly compare trend data to previous years due to the change in methodology.

**Further information can be found in the following sections overleaf. If you would like any further information or if removing these questions will cause any problems for your organisation, please email [market.research@ofcom.org.uk](mailto:market.research@ofcom.org.uk) by 9am on Monday 14 December 2020.**

## 2. Proposed changes to the 2021 Technology Tracker

### Methodology

- 2.1 The existing methodology of face-to-face in-home interviews with participants will not be conducted in 2021. Instead, the survey will be conducted both online and via a postal survey:
  - a) An online survey which up to two adults aged 16+ per household will be invited to complete (if they go online), via a postal letter.
  - b) For those not online, the postal letter will also invite up to two adults aged 16+ per household to complete a paper version of the questionnaire. This will differ from the online survey with focus on the non-internet user questions. More detail is provided at 2.7.
  - c) An online panel will be used to top up responses and manage quotas if needed.
  - d) If needed, a small subset of questions will also be asked via a telephone omnibus to ensure that non-online respondents are included in the sample
- 2.2 In order to ensure respondent engagement in the online/paper survey, several questions will be removed. Details of these are provided at 2.6.
- 2.3 It is important to note that although we are proposing to remove these questions for this wave in order to shorten the questionnaire length, we will be conducting a thorough review of our methodology and questionnaire in 2021 and will endeavour to reinstate key and relevant questions in the 2021 survey where possible.
- 2.4 For the questions that remain in the survey, some wording may need to be amended to reflect the change in methodology to online/paper surveys. The lack of a physical interviewer will also mean that the question wording will need to be made appropriate for self-completion.
- 2.5 For questions we are retaining, we may not be able to compare trend data due to the change in methodology, but we will evaluate this when we receive the data.

## Questions proposed for removal

- 2.6 Below are the questions we propose to remove for the 2021 survey. Note that question numbers refer to the [2020 questionnaire](#).
- a) Mobile phone:
    - i) **QD28C** asking respondents whether they mostly use their mobile phone to access the internet inside or outside of the home
  - b) Internet:
    - i) **QE36** asking respondents with a tablet in their household if they personally use it
    - i) **QE54** asking respondents with a PC/desktop in their household if they personally use it
    - ii) **QE55** asking respondents with a laptop in their household if they personally use it
    - ii) **QE56** asking respondents with a netbook in their household if they personally use it
    - iii) **QE40** asking respondents who use the internet at home which device is most important for connecting to the internet
    - iii) **QE11C** asking respondents who have fixed broadband at home how they find out what speeds they are getting
    - iv) **QE12** asking respondents who have fixed broadband at home whether the speed of their household's fixed broadband internet is faster or slower or about the same as they expected it to be when they first got it
    - v) **QE11D** asking respondents who use a fixed wireless internet connection at home which devices use their household's Wi-Fi connection
    - vi) **QE57** asking respondents who go online whether they ever use free public Wi-Fi services outside the home
    - vii) **QE29** asking respondents who don't use video/voice calls online if they are aware they could do so
    - viii) **QE33** asking respondents which devices they use to make voice or video calls using the internet
  - c) Smart technology:
    - i) **QV10** asking respondents with smart devices the reasons why they purchased a smart device, rather than a non-internet connected option
    - ii) **QV5** asking respondents who use a smart speaker, which activities they have used their smart speaker for in the last week (we will continue to ask QV4: which activities respondents have ever used their smart speaker for)
  - d) Radio:

- i) **QP27** asking respondents who listen to podcasts how often they listen to particular types of podcasts
  - ii) **QP28** asking respondents who listen to podcasts what genres of podcast they listen to
- e) Multi-channel TV:
- i) **QH74** asking respondents with an Ultra High Definition/4K TV whether they watch TV channels and programmes in UHD via a UHD/4K service
  - ii) **QH87B** asking respondents which TV services they personally use the most
  - iii) **QH93** asking respondents whether their household pays to receive channels from Sky Sports, BT Sport or any other paid sports channels. This question will be replaced with a new broader question asking which services respondents use to watch sports (see new questions to be added section below)
  - iv) **QR1B** asking respondents who have Virgin Media TV service whether their household has Virgin TiVo or V+ or the Virgin V6 box
  - v) **QR1C** asking respondents who have Freesat whether their Freesat or Sky set top box allows them to record and store TV programmes, and also pause and rewind live TV programmes
  - vi) **QR1D** asking respondents with Freeview whether their Freeview box or Freeview TV set allows them to record and store TV programmes, and pause and rewind live TV programmes
  - vii) **QR1E** asking all respondents with BT TV, TalkTalk TV, EE TV, YouView or Plusnet TV whether their TV service allows them to record and store TV programmes, and pause and rewind live TV programmes
  - viii) **QH92** asking respondents whether anyone in their household has bought a NOW TV Sports Pass to watch Sky Sports coverage in the past 12 months. This question will be replaced with a new broader question asking which services respondents use to watch sports (see new questions to be added section below)
  - ix) **QH94** asking respondents whether anyone in their household has bought a BT Sport Monthly Pass to watch BT Sport coverage in the past 12 months. This question will be replaced with a new broader question asking which services respondents use to watch sports (see new questions to be added section below)
  - x) **QH78** asking respondents which TV services they have used in the past week
  - xi) **QH83** asking respondents who subscribe to more than one online on-demand service which service their household uses the most
  - xii) **QH75** asking respondents what would encourage them to watch more online TV programmes or films than they currently do
- f) Demographics:

- i) **QZ14** asking respondents whether there are any other adults in the household working either full time or part time

## Questions for paper survey only

2.7 Questions asked of non-internet users will only be included in the paper survey and removed from the online version. The question numbers below relate to the 2020 questionnaire for reference. In addition to the non-internet user questions, the paper survey will include core questions asked of all participants but will not include the internet section of questions.

a) Non-internet use:

- i) **QE24** asking respondents how likely they are to get internet access at home in the next 12 months
- ii) **QE25A** asking respondents who said they are unlikely to get internet access at home in the next 12 months why that is
- iii) **QE25B** asking respondents what the main reason is why they are unlikely to get internet access at home in the next 12 months

## Questions with substantial amends

2.8 There are some questions which we intend to retain for the 2021 survey, but that will require adapting to support and optimise a self-complete survey. The question numbers below relate to the 2020 questionnaire for reference. Minor changes we have made as part of our usual yearly review of the questionnaire are not listed below (e.g. adding new examples into codes or updating code lists to ensure questions remain relevant)

2.9 Demographics:

- i) We will amend several demographic questions to ensure they adapt to the new methodology
- b) Mobile phone:
  - i) **QD41** and **QD47** asking respondents who use a smartphone whether they have a 4G or 5G service will be combined
  - ii) **QD28B** asking respondents if they have carried out any activities on their mobile phone in the last week will be changed to ask whether respondents have done the activities more since the start of social distancing in March 2020 due to the outbreak of Covid-19
- c) Internet:
  - i) **QE5B** asking respondents if they have carried out any internet activities in the last week will be changed to ask whether respondents have done the activities more since the start of social distancing in March 2020 due to the outbreak of Covid-19

- d) Multi-channel TV:
  - i) **QH53** and **QH70** asking respondents whether the main TV set in their household is HDTV/HD ready or Ultra High Definition/UHD ready/4K will be combined into one question
  - ii) **QH87A** and **QH77** asking respondents which TV, catch-up, on-demand, YouTube or other TV, film or video services are used in their household will be split into four different questions
  - iii) **QR1A** and **QR1H** asking respondents who have Sky satellite TV whether their household has Sky+ or Sky Q will be combined into one question
  - iv) **QH62** and **QH80** asking respondents whether any of their TV sets are smart TVs and if they are connected to their home broadband service will be combined into one question
  - v) **QH85** asking respondents with a TV how they choose to watch live TV will be changed to ask all respondents how they choose to watch any TV on live or on-demand services

## New questions to be added

2.10 We plan to include some additional questions in the survey:

- a) Devices:
  - i) A new question asking respondents whether they subscribe to any gaming subscription services
- b) Mobile:
  - i) A new question asking respondents whether any of the mobile phones used by other members of their household are smartphones
- c) Internet:
  - i) A new question asking respondents with internet access how many people in their household share the internet connection
  - ii) A new question asking respondents with internet access if their home internet connection is used for work/study
  - iii) A new question asking respondents about how much time they spend online across a typical week
  - iv) A new question asking respondents to score themselves on a scale of one to ten on how often they go online
  - v) A new question asking respondents who use online voice or video calls how their household's use of these services compare to a year ago (the start of 2020)
  - vi) A new question asking respondents who use online voice or video calls what they use these for



- d) Smart technology:
  - i) Two new questions asking respondents whether they or anyone in their household has a smart watch/wearable technology or a smart speaker. These two devices will be taken out of **QV2** (which smart technology devices the respondent has in their household and/or uses personally) and asked separately.
- e) Multi-channel TV:
  - i) A new question asking respondents which services are used in their household to watch sports
  - ii) A new question asking respondents which devices they use to watch live TV or on-demand or streaming services
- f) Demographics:
  - i) A new question asking respondents who makes the purchasing decisions regarding communications services in their household
  - ii) A new question asking respondents how their household financial situation has changed since the start of 2020.
  - iii) A new question asking respondents whether they receive any benefits