

A11. Consumer research technical notes

Ofcom research

Background

A1.1 Several of Ofcom's research studies have been referred to in the main body of this statement. This annex provides a brief outline of the surveys referenced.

Technology tracker

A1.2 Ofcom's **Technology tracker** is run annually. This is a face-to-face study among a nationally representative sample of the UK population aged 16+. The objective of the survey is to track ownership of, attitudes towards, and the behaviour of, UK consumers with respect to residential telecommunications, broadcasting and the internet. The wave of research referred to in this statement was conducted between 9 January and 7 March 2020, prior to the national lockdown imposed due to the coronavirus (Covid-19) pandemic.

Switching trackers

A1.3 Ofcom runs an annual **Core switching tracker**, which 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).¹ This is run among UK adults aged 16+ (screening for decision makers in each market) to measure engagement levels and switching incidence in each market.

A1.4 Between 2015 and 2019, fieldwork for the Core switching tracker was conducted face to face. In March 2020 (due to the Covid-19 pandemic), Ofcom suspended all face-to-face interviewing. The Core Switching Tracker in 2020 was conducted using a mixture of post-to-web, post-to-phone and online panels between June and November 2020.

A1.5 The Switching experience tracker has been run twice (in 2018 and 2020) and uses a quota sample of adults aged 16+ who have switched any communications service.² Quotas are also applied in order to obtain sufficiently robust sample sizes of those who have: (i) switched between fixed telecoms providers that both use the Openreach network; and (ii) switched between a fixed telecom provider that uses the Openreach network and a non-

¹ See Ofcom 2020. [Core switching tracker](#); and [core switching tracker questionnaire](#); and the [technical report](#) which provides details of the survey methodology and weighting.

² See Ofcom 2020. [Switching experience tracker](#); [switching experience tracker questionnaire](#); and the [technical report](#) which provides details of the survey methodology and weighting.

Openreach provider. We record current and previous providers of mobile, landline, broadband and pay-tv and whether these are taken as a bundle or as standalone services.³

- A1.6 The Switching experience tracker provides insight into the reasons people decide to switch provider, the steps taken, and any difficulties encountered during the switching process. It also provides insight into the reasons for considering switching and any difficulties encountered during the consideration process by those who considered switching but then decided not to, instead deciding to stay with their existing provider.
- A1.7 The Switching experience tracker uses an online methodology, so fieldwork was unaffected by Covid-19. Fieldwork was conducted in two waves, February – March and September – October and covered respondents’ experiences of switching or considering switching during the six months preceding the interview. By rolling the data from the two waves together, we form a picture of switching and consideration of switching over a 12-month period.

Definition of “switchers” and “considerers”

- A1.8 As our statement relates to the switching process for fixed landline and broadband, we have based our analysis of switchers using the Core switching tracker and the Switching experience tracker data on those who switched landline and/or broadband, whether as a standalone service or as part of a bundle with other services.
- A1.9 As the Switching experience tracker does not split out *consideration* of switching into individual services, we have based our analysis on those who considered switching a dual play (fixed landline and fixed broadband from the same provider) or a triple play (fixed landline, fixed broadband and pay-tv from the same provider) package.⁴

Population estimates

- A1.10 In this statement, we have included two population estimates based on data from the 2020 Core switching tracker, the 2020 Switching experience tracker and the Office for National Statistics (ONS) 2019 estimates of the number of households in the UK⁵. These estimates are: the number of households that experienced difficulty with their losing provider trying to persuade them to stay when switching landline and/or broadband provider; and the number of households that experienced difficulty contacting their previous provider during the switching process of switching landline and/or broadband provider.
- A1.11 All generated household estimates are reported to the nearest 10,000. This is the standard rounding that Ofcom uses in producing population estimates from survey data with a

³ The proportions of switchers and considerers experiencing difficulty with various aspects of the switching/consideration process were higher in our 2020 Research than the 2018 Research, possibly influenced by Covid-19 affecting staffing rates in providers’ customer contact centres. Many providers had notices on their websites advising customers that they were currently short-staffed and that call waiting times could be longer than normal. In recognition of this we have also included the equivalent data from the 2018 Research in the statement.

⁴ Switching experience tracker extra analysis [2020](#) and [2018](#).

⁵ See ONS 2019. [Families and Households](#), table 5.

sample size of around 1,000. Larger samples sizes are required in order to provide more precision.

A1.12 These estimates are derived from a sample of UK adults and is weighted to be representative of the UK adult population. The profile of the UK adult population is distinct from the profile of UK households. However, as these questions relate to household behaviour and a single person is asked per household, it was not deemed necessary to reweight the data to be representative of UK households.

A1.13 The approach taken to calculate the population estimates are shown in the figures below. Data in red and marked with an asterisk illustrates the percentages used in the calculations and the corresponding population estimate. As these calculations are based on survey data collected from a sample of the population as opposed to a census of the total population, the statistical margin of error around the calculations must be taken into account. We have calculated mid-point estimates, along with upper and lower bounds. The actual numbers of households in the population with these services / experiencing each of the specified problems will fall somewhere between the lower and upper bounds detailed in the figures below.

Figure A6.1: Incidence (%) and number of UK households with landline and/or broadband

	2020 Technology Tracker	ONS Families and Households data released 15 November 2019	Estimated number of households (rounded to nearest 10,000)
Base	n=2675	27,824,000	
Percentage of base that have landline and/or broadband in household	97.72%* (n=2,614)		27,190,000*
Upper bound	98.29%		27,350,000
Lower bound	97.15%		27,030,000

Figure A6.2: Switched landline and/or broadband provider in the last 12 months

	2020 Core Switching Tracker	Estimated number of households (rounded to nearest 10,000)
Base: UK households with a landline and/or broadband service	n=1500	27,190,000
Percentage of households that <u>switched</u> landline and/or broadband in last 12 months	8.13%* (n=122)	2,210,000*
Upper bound	9.52%	2,590,000
Lower bound	6.75%	1,830,000

Figure A6.3: Switchers who contacted their previous landline and/or broadband provider and experienced difficulties with their provider trying to persuade them to stay

	2020 Switching Experience Tracker	Estimated number of households (rounded to nearest 10,000)
Base: UK households interviewed about <u>switching</u> landline and/or broadband in last 12 months	n=632	2,210,000
Percentage of switchers that contacted their previous landline and/or broadband provider and experienced <u>difficulties</u> with the provider trying to persuade them to stay ⁶	6%* (n=40)	140,000*
Upper bound	8.23%	180,000
Lower bound	4.43%	100,000

Figure A6.4: Switchers experiencing difficulties with contacting their previous landline and/or broadband provider

	2020 Switching Experience Tracker	Estimated number of households (rounded to nearest 10,000)
Base: UK households interviewed about <u>switching</u> landline and/or broadband in last 12 months	n=632	2,210,000
Percentage of switchers that experienced <u>difficulties</u> contacting their previous landline and or broadband provider ⁷	10.44%* (66)	230,000*
Upper bound	12.83%	280,000
Lower bound	8.06%	180,000

⁶ As noted in section 4, this equates to 24% among those who contacted their previous provider.

⁷ As noted in section 4, this equates to 39% among those who contacted their previous provider.