
Ofcom's Technology Tracker

Notification of changes to the 2022 survey

1. Overview

Background to survey

The Technology Tracker provides us with continuous understanding of consumer attitudes and behaviour in the UK telecommunications and broadcasting markets (fixed and mobile telecoms, internet, TV, smart devices 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 2021, the methodology used for the Technology Tracker was face-to-face interviews in the home with the respondents, carried out once a year (January-February) with around 3,900 adults.

The outbreak of Covid-19 prevented the face-to-face completion of surveys from operating in 2021. Therefore, respondents were instead recruited via a postal letter and encouraged to complete the survey themselves either online or via a paper questionnaire. In addition, a small subset of questions was asked via a telephone omnibus to ensure offline consumers were included.

For the 2022 survey, we plan to return to face-to-face recruitment, depending on the risk that Covid-19 poses during the fieldwork period (January-March). The survey itself will then be completed face-to-face on the doorstep at a time that suits the respondent, or they will be given the option to self-complete the survey either online or via a paper questionnaire if they prefer. However, if we decide a face-to-face methodology is not suitable, we will revert to the same methodology used in 2021. The decision about methodology will be made jointly between Ofcom and the agency, and will take into account government and market research industry guidance.

We have made some changes to the survey this year, ensuring the questionnaire is suitable for self-completion and remains straightforward and up-to-date as part of a standard yearly review. This consultation document provides details of the proposed changes and we invite stakeholders to feedback their views on these.

Impact on trend data

As an official statistic, this survey provides trend data. However, the change in methodology in 2021 and 2022 means that we may 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:

- Return to face-to-face methodology for the Technology Tracker survey, but with an option for respondents to self-complete online or via a paper questionnaire if they would prefer. Interviewers will visit selected homes to recruit respondents, and offer to administer the survey on the doorstep with the assistance of a tablet computer and paper showcards.
- However, the Covid-19 situation will be closely monitored and Ofcom and the agency may make a joint decision regarding the return of a face-to-face methodology and whether to instead recruit via a postal letter, as in 2021.
- If we keep the postal letter methodology from 2021, 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.
- 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 has been slightly reduced compared to 2020 and prior years, to maintain respondent engagement in online/paper surveys. Like in previous years, other changes to the questionnaire have also been made to optimise the questionnaire and ensure it is straightforward and up-to-date.
- We may not be able to directly compare the 2022 data to 2021, or to previous years, due to the changes in the 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 by 9am on Monday 15 November 2021.

2. Proposed changes to the 2022 Technology Tracker

Methodology

- 2.1 We plan to return to face-to-face recruitment and doorstep completion of the Technology Tracker survey in 2022, as was the case prior to 2021. In this case, interviewers will visit selected homes to recruit respondents. The respondents would then have three options on how to complete the survey:
- a) Allow the interviewer to administer the survey on the doorstep, with the assistance of the interviewer's tablet computer and paper showcards.
 - b) Self-complete the survey online, in which case the interviewer would ask for the respondent's email address and send an email link to the survey.
 - c) Self-complete the survey on paper, in which case the interviewer would hand the respondent a paper copy of the questionnaire as well as a pre-paid envelope to return it once completed. This may differ slightly from the online survey due to the need to cut down the length of the questionnaire to make it more suitable for paper completion.
- 2.2 However, we will monitor the Covid-19 situation and Ofcom and the agency may make a joint decision that it would be more suitable to keep the postal letter recruitment from 2021. In this case, the survey would 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, a postal letter will also invite up to two adults aged 16+ per household to complete a paper version of the questionnaire. This may differ slightly from the online survey due to the need to cut down the length of the questionnaire to make it more suitable for paper completion. Any questions focussed on internet access and use will be included. More detail is provided at 2.6.
 - c) An online panel may be used to top up responses and manage quotas if needed.
- 2.3 In order to ensure the questionnaire remains suitable for self-completion, as well as ensuring the survey is straight-forward and up-to-date, several questions have been removed and added for the 2022 survey. Details of these are provided at 2.5 and 2.7.
- 2.4 For questions we are retaining, we may not be able to compare trend data due to the changes in methodology, but we will evaluate this when we receive the data.

Questions proposed for removal

2.5 Below are the questions we propose to remove for the 2022 survey. Note that question numbers refer to the [2021 questionnaire](#).

- a) Mobile phone:
 - i) **QD28B** asking respondents which mobile phone activities they have done more or less of since the start of the Covid-19 pandemic
 - ii) **QD1** asking respondents how many mobile phones their household owns (we will still cover ownership of both mobile phones and smartphones)
 - iii) **QD2** asking respondents how many mobile phones with different numbers that they use each month
- b) Internet:
 - i) **QE23** asking respondents how often they personally use the internet
 - ii) **QE28B** asking respondents their *main* reason for not wanting to get internet access at home set up in the next 12 months (we still ask for their reasons in QE28A)
 - iii) **QE35** asking respondents whether they or anyone else in their household use a fixed wireless internet connection at home (e.g. a WiFi router)
 - iv) **QE50A** asking respondents whether their use of VOIP calls (Voice Over Internet Protocol) has increased or decreased since the start of the Covid-19 pandemic
 - v) **S1BBC** asking respondents how many hours in a typical week they spend online
 - vi) **S1ABBC** asking respondents to rank themselves on a scale of 1-10 on how much they use the internet
- c) Devices Owned:
 - i) **QV2** asking respondents with smart home technology, such as smart fridge freezers, whether they personally use them (we will still cover ownership)
 - ii) **QV6** asking respondents whether they ever use voice controls (use of smart speakers and voice controls in cars will still be covered by separate questions)
 - iii) **QV7** asking respondents which types of information or tasks they achieve using voice controls
 - iv) **QV8** asking respondents who in their household uses voice controls
 - v) **QV10** asking respondents whether they own a smart watch (smart watch ownership will still be covered in QB2)
- d) Radio:
 - i) **QP1** asking respondents how many days a week on average they listen to the radio
 - ii) **QP4** asking respondents in which rooms they have radio sets

- iii) **QP12** asking respondents who do not own a DAB radio how likely it is they will purchase a DAB radio in the next 12 months
 - iv) **QP14A** asking respondents who do not own a DAB radio and state they are unlikely to purchase one in the 12 months, what the reasons are why they are unlikely to purchase a DAB radio in the next 12 months
 - v) **QP26** asking respondents which devices they use to listen to the radio (we will still capture radio listening via a radio set, car radio, mobile phone and smart speakers in separate questions)
- e) TV:
- i) **QH62** asking respondents whether they own a smart TV (smart TV ownership will still be covered in QB2)
 - ii) **QH66** asking respondents who do not have a TV set why they do not own a TV set
 - iii) **QH85** asking respondents which TV, shows and films they watch on Broadcast Video on Demand services (BVODs)
 - iv) **QH87AB** asking respondents which TV, shows and films they watch on Streamed Video on Demand services (SVODs) (we will still capture viewership of some SVOD services, in QH84)
 - v) **QH87AC** asking respondents how they decide which programme, channel or films to watch
- f) Introduction:
- i) **SM** asking respondents whether they can speak or write in Welsh
 - ii) **SN** asking respondents what their preferred language is
- g) Demographics
- i) **SGA** asking respondents whether they currently work from home (this is already captured in QE59)
 - ii) **QZ10** asking respondents what their national identity is (we already capture nationality in INT4)
 - iii) **QZ18** asking respondents who makes the decision about services in their household
 - iv) **QZ20** asking respondents how their household monthly income has changed since the beginning of the Covid-19 pandemic

Questions for paper survey only

- 2.6 In case of the need for a return to the post-to-web and post-to-mail methodology we used in 2021, we will ask slightly different questions on the paper and online surveys. 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 2021 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

New questions to be added

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

- a) Devices Owned:
 - i) A new question asking respondents how many smart speakers or smart displays they have
 - ii) A new question asking respondents whether any of their smart speakers is a smart display
 - iii) A new question asking respondents with children whether their children use smart speakers
 - iv) A new question asking respondents which rooms they listen to smart speakers in
 - v) A new question asking respondents if they do not currently own a smart speaker and say they do not wish to purchase one in the next year, why they do not plan to purchase a smart speaker in the next year
 - vi) A new question asking respondents which specific games consoles they own
 - vii) A new question asking respondents with children whether their children have access to appropriate devices to do school work at home
- b) Mobile:
 - i) A new question asking respondents what data allowance they get on their mobile phone contract
- c) Internet:
 - i) A new question asking respondents whether they ever connect to the internet using a VPN, and if so whether this is for work, education or other reasons
- d) TV:
 - i) A new question asking respondents who subscribe to Netflix which subscription type they have
- e) Demographics:

- i) A new question asking respondents with children the specific ages of their children