Preface

The Switching Tracker study has been run by Critical Research on behalf of Ofcom.

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.

The interviewing method for the Switching Tracker has been modified over the years. Up to and including 2014, this study was conducted by telephone, using random digit dialling to mobile and landline numbers. In 2015 the fieldwork was shared between telephone interviewing and face-to-face interviewing. From 2016 to 2019 all of the fieldwork was conducted face-to-face in home using CAPI (Computer Assisted Personal Interviewing).

In both 2020 and 2021 all face-to-face fieldwork was suspended due to the Covid-19 pandemic and a change in methodology was required. The interviewing was conducted through a mix of post-to-web, post-to-phone and online panel approaches. In 2022 and 2023 it was decided to continue with this mix of approaches in order to maintain comparability.

Critical Research interviewed 2,717 adults aged 16+ in the UK across the different survey methods in 2023. Interviews achieved through post-to-online, post-to-phone and online panel approaches were carried out in August and September 2023.

For the postal approach, a letter was sent to a sample of UK households inviting one member of the household who has responsibility for at least some communications services to complete the survey online or by telephone, depending on their preference. Those interviewed online following a postal invitation were asked for referrals to friends or family members without access to the internet. Once the post-to-online and post-to-phone interviewing was complete, some additional interviews were conducted using online panels in order to balance the overall sample and ensure that the sample was nationally representative of the UK population.

For the 2023 interviewing, minimal changes were made to the 2022 questionnaire. In 2023, questions were added to establish whether those with a landline phone service connected their phone via a traditional wall socket or a broadband router. Those who connected their landline phone via a broadband router were asked some questions about this service.

As in previous years, questions were asked up front to establish household ownership of landline, fixed broadband, TV service and mobile. For each service, it was established whether the respondent was the decision maker – with detailed questions asked for each market sector that the respondent was the decision maker for, covering both individual/ standalone services and services that are part of a package/ bundle.

The 2023 survey continued with the approach to defining bundles or packages of services that had been introduced in the 2018 survey. Under this approach, the detailed questions for decision makers only referred to bundled services if this matched how the respondent regarded their services. The detailed questions otherwise referred to the individual services if this is how they were regarded by the respondent.

To achieve this, the survey first established which provider was used for each of the services (within landline, fixed broadband, TV service and mobile) that the respondent was the

decision maker for. Those using the same provider for two or more of these four services were asked to say whether they regard these services to be a package of services or individual services. Those with three or four services from the same provider could respond that they regarded some but not all services to be a package of services, in which case a further question then established which services were regarded as a package and which were regarded as individual services.

The data tables show both definitions for bundled services: 'Simple bundle' where the same provider is used for more than one of the services and 'Regard bundle' where the decision maker regards services from the same provider to be a package of services rather than individual services. More details are shown in the example below.

The following example refers to <u>weighted data</u> shown in the data tables (please note that figures reported below may not add to 100% due to rounding).

Of the 1663 decision makers for landline (see Q3), 1457 use their landline provider for any other services (see Q7A/Q7B), so the remaining 206 landline decision makers do not use their landline provider for any other services. The cross-break labelled LANDLINE – SIMPLE therefore shows 206 as STANDALONE and 1457 as SIMPLE BUNDLE.

Those who use their landline provider for any other services are asked Q8A or (if they have two pairs of bundles) Q8B to establish whether they regard these services to be a package of services or individual services. Of the 1457 who use their landline provider for any other services, 1263 regard these as a package of services (see Q9A/Q9B), while the remaining 194 decision makers consider landline to be a standalone service. Adding these 194 to the 206 who don't use their landline provider for any other services, the total number of decision makers who regard landline to be a standalone service is therefore 400. The cross-break labelled LANDLINE – REGARD therefore shows 400 as STANDALONE and 1263 as REGARD BUNDLE.

Please note – as in previous years, the data tables have some gaps in the sequence of table numbers shown for the service-specific questions from Q11. No questions are missing. The gaps in the sequence are because the questions that don't apply for a particular service (e.g. apply to landline only) are skipped for other services and the table numbers also skip as a result.

Since 2018 the survey has accommodated two separate pairs of packages or bundles: where one provider was used for two of the four possible services and a second provider was used for the other two services. In the 2023 survey, 14 of the 2,717 interviews conducted were with decision makers with two pairs of services from two different providers.

Analysis was conducted by each total market i.e. fixed line, mobile, fixed broadband, digital TV, allowing comparisons to be made between those who consider the service to be standalone and those who consider the service to be part of a package or bundle. During analysis, weighting was applied for each market section (i.e. each of the above markets) of the survey using profiles from Ofcom's Technology Tracker Survey.

Details of the sample design, research methodology, and weighting procedures are outlined in this document. A note on statistical reliability is also included.

Sample Design

For the postal approach, samples were drawn using the Royal Mail Postcode Address File (PAF) containing a mix of a random sample of residential addresses across the UK, as well as a sample of addresses targeting areas with a higher incidence of older adults and households in the DE socio-economic group, in order to provide improved coverage of non-internet households.

A letter was sent to each selected address, inviting an adult in the household to take part in the survey Reminder letters were sent to non-responders two weeks after the initial invitation.

Weighting

Historically, Switching Tracker data has been weighted to reflect the overall profile of products held (using data from the Technology Tracker), and to estimates of the demographics of decision makers using target rim weights for age, gender and socio-economic group (SEG). The demographic target weights were reviewed in 2020, to bring these more in line with overall UK demographics.

Two further levels of weighting were included due to the change in methodology since 2020. The online panel interviews showed a higher level of moving house compared to those in the postal sample and therefore those moving in the last 12 months on the panel were down-weighted. As in each year since 2020, we reweighted the incidence of those responsible for Pay TV in the final weighting matrix to align with the 2019 incidence level.

The following table shows the initial unweighted sample across all respondents and the final weighted sample profile across all respondents.

Figures are based on UK adult decision makers	% Weighted	% Unweighted
	Profile	Interviews achieved
Gender – Man 16+	52%	51%
Gender – Woman 16+	47%	47%
Age – 16-34	29%	28%
Age – 35-54	38%	37%
Age – 55+	33%	35%
SEG – AB	28%	29%
SEG – C1	28%	28%
SEG – C2	21%	20%
SEG – DE	23%	23%
Region – England	82%	83%
Region – Scotland	9%	9%
Region – Wales	5%	5%
Region – Northern Ireland	3%	3%

Guide to Statistical Reliability

The variation between the sample results and the "true" values (the findings that would have been obtained if all communications services decision makers in the UK had been interviewed) can be predicted from the sample sizes on which the results are based, and on the number of times that a particular answer is given.

Given that this study uses a mixed method approach (post-to-online, post-to-phone and online panel), the confidence with which we can make this prediction has been chosen to be 99%. That is, the chances are 99 in 100 that the "true" values will fall within a specified range. However, as the sample is weighted, we need to use the effective sample size (ESS) rather than actual sample size to judge the accuracy of results.

The following table compares ESS and actual samples for some of the main groups across all respondents.

	Actual	ESS
Total	2,717	2,290
GENDER: MAN	1,391	1,188
GENDER: WOMAN	1,279	1,064
AGE: 16-34	760	601
AGE: 35-54	997	845
AGE: 55+	954	855
SEG: AB	786	675
SEG: C1	751	617
SEG: C2	530	449
SEG: DE	622	529

The table below illustrates the required ranges for different sample sizes and percentage results at the "99% confidence interval":

Approximate sampling tolerances applicable to percentages at or near these levels

Effective sample size	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
	±	±	±	±	±
2,290 (Total)	1.6%	2.2%	2.5%	2.6%	2.7%
1,188 (GENDER: MAN)	2.2%	3.0%	3.4%	3.7%	3.7%
617 (SEG - C1)	3.1%	4.1%	4.8%	5.1%	5.2%

For example, if 30% or 70% of a sample of 2,290 gives a particular answer, the chances are 99 in 100 that the "true" value will fall within the range of ± 2.5 percentage points from the sample results.

When results are compared between separate groups within a sample, different results may be obtained. The difference may be "real", or it may occur by chance (because not all communications services decision makers have been interviewed). To test if the difference is a real one – i.e. if it is "statistically significant" – we again have to know the size of the samples, the percentages giving a certain answer and the degree of confidence chosen. If we assume "99% confidence interval" – given the mixed method approach used - the difference between two sample results must be greater than the values given in the table below to be significant:

Differences required for significant at or near these percentages

Sample sizes being compared	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
	±	±	±	±	±
1,188 vs. 1,064 (Man vs. Woman)	3.3%	4.3%	5.0%	5.3%	5.4%
675 vs. 617 (SEG AB vs. C1)	4.3%	5.7%	6.6%	7.0%	7.2%