Preface

The Switching Experience Tracker study has been run by Critical Research on behalf of Ofcom. Fieldwork was conducted from March to April 2020 and from September to October 2020. The data collected has been combined for reporting. A total of 3,502 interviews were conducted in 2020 with service decision makers who had recent experience of switching provider for a service of interest or who had recent experience of deciding not to switch provider for a service of interest having actively started looking. The four key markets of interest are mobile, dual play (fixed landline and fixed broadband from the same provider), triple play (fixed landline and fixed broadband and Pay TV from the same provider), and standalone Pay TV.

The Switching Experience Tracker enables Ofcom to monitor the switching experience of small sub-groups of switchers e.g. those switching mobile network and porting their number, those switching fixed services on the Openreach network, and those switching via different processes.

The primary objectives are to track and understand the motivations and reasons for switching and any barriers / difficulties in doing so among sub-groups of switchers and those that decided not to switch. Quotas are set for the interviews to be conducted with different sub-groups of switchers and for those who decided not to switch; in order to look in detail at these particular groups and their experiences, rather than to provide incidence measures.

Ofcom's Core Switching Tracker, a separate survey run annually among a nationally representative sample of decision makers across the core communications markets, provides measures of the incidence of switching provider. The Switching Experience Tracker provides extra levels of detail around the motivations to switch, difficulties faced when switching and reasons for deciding to remain with the existing provider.

In order to reach robust samples of the small sub-groups of recent switchers and those who recently decided not to switch, the fieldwork for the Switching Experience Tracker was conducted online through a research panel with UK adults aged 16+. All respondents taking part were the primary or joint decision maker for one or more of the communications services of interest. 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.

Groups of interest – by service and switching process

Quotas were set for the interviews conducted with decision makers who had recently (last six months) switched provider for a service of interest or who had recently (last six months) decided not to switch provider for a service of interest having actively started looking at changing provider. As detailed above, the four key markets of interest are mobile, dual play (fixed landline and fixed broadband from the same provider), triple play (fixed landline and fixed broadband and Pay TV from the same provider), and standalone Pay TV.

Among those switching provider the focus of the research was those who switched without moving in the previous six months. A total of 1,763 interviews were conducted with adults aged 16+ who switched without moving – with quotas set on the service/s switched and the switching processes used, as detailed below. For dual play and triple play bundles, switchers can be defined as Cross Platform Switchers (CPS) (switched to or from a Virgin triple play or dual play package; or from Sky triple play to Openreach; or to/ from Virgin/ Sky standalone Pay TV) or Openreach switchers (ORS) (switched a triple play or dual play package to and from a provider on the Openreach network (includes switching to/ from Sky dual and from Openreach to Sky triple). Some of these groups of interest with recent experience of switching provider within the Fixed market have a very low incidence within the UK population and so targets were set on a best effort basis.

In the mobile market the switching process depends on whether the consumer wishes to retain their mobile number. If so, they will follow the PAC process (whereby the consumer is required to obtain a port authorisation code (PAC) from their current provider and give this to their new provider). If not, they will use the default position of Cease and Re-provide (C&R) (whereby the consumer cancels the service with their current provider and separately signs up to a new provider).

A relatively small number of interviews (171) were conducted with those who had recent experience of switching other combinations of communications services or other standalone communications services. Similarly, a relatively small number of interviews (227) were conducted with those who switched communications service provider/s when moving home.

Interviews achieved

The 1,763 interviews achieved with those who recently switched provider without moving within the sub-groups of interest are detailed below:

Mobile switched by PAC	567
Mobile switched by C&R	344
Dual Play CPS – involving Virgin	135
Dual Play ORS – not involving Virgin	344
Triple Play CPS – involving Virgin or from Sky*	133
Triple Play ORS – not involving Virgin and not from Sky*	72
Standalone Pay TV	168

* Sky landline and broadband services use the Openreach network and their Pay TV is via satellite. A switch from Sky Triple Play therefore involves both CRS and ORS processes.

In total, 416 interviews were conducted with Fixed market ORS switchers and 436 with Fixed market CPS switchers (including Standalone Pay TV).

Among those who decided not to switch, the focus of the research was on those who actively started looking for a new provider but were no longer currently actively looking at the time of interview, with quotas set on the service/s switched. A total of 1,341 interviews were conducted with adults aged 16+ who considered and then decided not to switch in the previous six months, as detailed below:

Considered switching mobile	341

Considered switching triple play	338
Considered switching dual play	343
Considered switching Pay TV	319

Weighting

As detailed earlier, in order to achieve robust sample sizes within each sub-group of interest, quotas were set for the interviews among those who switched and those who had considered and then decided not to switch. During analysis of the data, weighting was applied to reflect the natural incidence of each group.

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

Figures are based on eligible UK adult decision makers	**% Unweighted**	**% Weighted**
	Interviews achieved	Profile
Gender – Male 16+	47%	47%
Gender – Female 16+	53%	53%
Age – 16-34	65%	67%
Age – 35-54	27%	25%
Age – 55+	8%	8%
SEG – AB	39%	40%
SEG – C1	26%	26%
SEG – C2	16%	16%
SEG – DE	18%	18%
Region – England	85%	85%
Region – Scotland	8%	8%
Region – Wales	5%	5%
Region – Northern Ireland	2%	2%

Guide to Statistical Reliability

The variation between the sample results and the "true" values (the findings that would have been obtained if all eligible 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. The confidence with which we can make this prediction is usually chosen to be 95%, that is, the chances are 95 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	3,502	3,254
GENDER: MALE	1,645	1,527
GENDER: FEMALE	1,827	1,698
AGE: 16-34	2,282	2,119
AGE: 35-54	932	871
AGE: 55+	280	263
SEG: AB	1,380	1,274
SEG: C1	920	856
SEG: C2	558	520
SEG: DE	620	582

The table below illustrates the required ranges for different sample sizes and percentage results at the "95% 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%** ±
3,254 (Total)	1.1%	1.4%	1.6%	1.7%	1.8%
1,527 (GENDER: MALE)	1.5%	2.0%	2.3%	2.5%	2.6%
856 (SEG - C1)	2.1%	2.7%	3.1%	3.3%	3.4%

For example, if 30% or 70% of a sample of 3,254 gives a particular answer, the chances are 95 in 100 that the "true" value will fall within the range of ± 1.6 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 “95% confidence interval”, 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%** ±
1,527 vs. 1,698 (Male vs. Female)	2.1%	2.8%	3.2%	3.4%	3.5%
1,274 vs. 856 (SEG AB vs. C1)	2.6%	3.5%	4.0%	4.2%	4.3%