

Ofcom Technology Tracker 2025 - Technical Report

This report, written by BMG Research, details the methodology and technical specification for the 2025 Technology Tracker study, which has been run by BMG Research on behalf of Ofcom. The Technology Tracker has been running for almost 20 years, and the objective of the survey has remained consistent with the previous three studies (2022, 2023 and 2024) which were also undertaken by BMG: to track the attitudes and behaviour of the UK population (aged 16+) with respect to residential telecommunications, broadcasting and the internet.

1.1 Approach

Fieldwork for the survey took place using a primarily face-to-face methodology whereby respondents were interviewed on the doorstep with the interviewer recording answers via an interactive version of the survey using a tablet device. For a small number of cases where respondents were interested in taking part but not able to do so while the interviewer was present, an alternative postal return methodology was provided. This approach was designed to achieve 80% of the target sample – i.e. 3,200 of the 4,000 interviews.

A secondary methodology, introduced first for the 2023 study, was included whereby respondents could complete the survey online via web link. This web link was issued via letters sent to a selection of addresses – an approach commonly known as push-to-web. The postal return methodology was also offered to these respondents as an alternative to the web link. This approach was designed to achieve the remaining 20% of the target sample – i.e. 800 of the 4,000 interviews.

These two approaches are detailed further in section 1.3.1 of this report.

In total BMG Research interviewed 4,045 people aged 16+ across the United Kingdom between January 7th and April 16th 2025. Interviews were carried out across 315 different sampling units across the UK with 12 or 13 interviews carried out in each. Each interview took approximately 20 minutes to complete.

In England representative quotas were set by government office region (GOR), but in each of the devolved nations (Scotland, Wales and Northern Ireland) a boost was placed on the sample to allow for sub-group analysis within each nation. Within each region quotas were then applied so that each was representative by age, gender and socio-economic group (SEG). These regional quotas were then applied down to the level of each sampling unit to provide 315 representative snapshots of the UK population. After fieldwork, weights were also applied to data so that it was representative of the UK population by age, gender, SEG, working status, region and cabled/non-cabled area.

Further details of the sampling frame, research methodology, weighting procedures and reporting are outlined in the following pages. The SPSS files from the study are available on request.

1.2 Sample design

2025 fieldwork was conducted via two methodologies. A primary face-to-face methodology, which was conducted with an identical approach to that which was used in 2022, 2023 and 2024. This approach accounted for 3,205 completed interviews. The secondary methodology which used a push-to-web approach accounted for 821 interviews. The remaining 19 interviews were conducted via the postal survey approach.

The sample was divided into two groups, a core and flex sample, each comprising of 2,000 respondents. The core group would be recruited only using face-to-face interviewing, with quotas to ensure that this sample was representative as a standalone subset. The remaining flex sample was split between 1,200 face-to-face interviews and 800 online interviews. The quotas for the face-to-face aspect of this would then flex based on what had been achieved in the push-to-web element.

The push-to-web methodology was utilised so that we are able to retain comparability with the face-to-face approach. This is because both use a random probability sampling method. Therefore, only one sampling process is required for use across both methodologies.

1.2.1 Setting up sampling units

The target sample of 4,000 was split across 315 sampling units, giving a target of 12 or 13 interviews in each sampling unit. In England, Wales and Scotland Output Areas (OAs) were used as the basic building block for sampling. In Northern Ireland OAs are no longer used as a geographic area, instead these have been replaced with DataZones, as a result these were used in place of the OAs.

These were then stratified by region, then within region along a 6-point urban/rural categorisation. Quota control was applied per region by three key variables (age, gender, socio-economic grade) to control the sample and ensure the units in a given region added up to be representative of each. In Scotland some SUs comprised of multiple OAs due to low populations in individual OAs. All OAs that were combined in this way were neighbouring.

A boosted sample of 500 in each of the devolved nations (Scotland, Wales, Northern Ireland), meant that a higher proportion of the sampling units were placed in each of these regions. The remainder were split across England to be representative of GOR by population size. Please see the table below for the breakdown of sampling units per region.

Region (GOR)	Sampling units	Percentage of sampling units	Average number of people per sampling unit
East Midlands	17	5%	326
East of England	22	7%	354
London	31	10%	385
North East	9	3%	330
North West	26	8%	318
South East	33	10%	356
South West	20	6%	389
West Midlands	21	7%	364
Yorkshire and The Humber	19	6%	327
Scotland	39	12%	283
Northern Ireland	39	12%	579
Wales	39	12%	328

In addition to the specifications above, this year a boost was introduced for areas which had higher proportions of residents in the C2 social grade, because C2 targets were proving increasingly hard to achieve in the most recent waves of fieldwork. This process was done by ensuring that 20% of the selected sampling units within each Region were high C2 areas. High C2 areas are OAs (or DZ in Northern Ireland) that are in the top 10% in terms of C2 representation (based on the most recently available SEG statistics).

Once the sample was extracted and sorted, it was checked for close correspondence to the UK population by deprivation - using indices of multiple deprivation (IMD) – and cabled/non-cabled areas – using a database supplied by Ofcom.

Because of the differing profile of each region, sampling units were not created to be uniform in size, but instead an SU is measured by the number of addresses it contains. The SUs were selected with a probability proportionate to size. This was done by grouping the SUs into size bands, then those with a larger population were assigned a higher probability of being selected, those with a smaller population were

made less likely to be selected. This ensures that all households within an SU have an equal chance of being selected, regardless of the size of the SU in which a household is situated. Each address selected within an SU was assigned an ID.

In addition to the 315 SUs, the same number of back-up units with identical demographic profiles were created so that interviewers had additional addresses to recruit from, should they fail to hit their quotas in the primary SU.

SU targets were not method specific. The 12 or 13 interviews required in each unit were to be conducted either face-to-face or via push-to-web. In order to retain the 80/20% split between face-to-face and push-to-web methodologies, a limit of 2 to 3 online completes per unit was imposed.

1.2.2 Quotas

As mentioned in the previous section, the sample was designed to be representative of the UK population (with a boost in devolved nations).

This was built from the foundations of the sample upwards. Each SU was set individual quotas by age (16-24, 25-44, 45-64, 65+), gender (male, female), and socio-economic grade (AB, C1, C2, DE).

Quotas for fieldwork were set using the 2021 Census as the primary source in creating age, gender and social grade targets. These quotas match those used in the 2024 Tech Tracker data. As in 2024, in Scotland, social grade census data was not available, so 2022 mid-year estimates were used. These estimates were based on extrapolation from the 2011 census data.

The below table shows the quotas set for this project at a UK-wide level.

Demographic	Quota set	Interviews achieved - unweighted	Weighted sample
Gender – Male	48%	49%	48%
Gender – Female	52%	51%	51%
Age – 16-24	13%	11%	13%
Age – 25-44	32%	33%	34%
Age – 45-64	32%	32%	31%
Age – 65+	23%	24%	22%
SEG – AB	23%	23%	23%
SEG – C1	33%	29%	32%

SEG – C2	22%	21%	21%
SEG - DE	23%	27%	23%

Quotas were designed to work in tandem across both methodologies. If a push-to-web interview was conducted with a male respondent, aged 16-24, in SEG DE, this was marked as a complete against the target and removed from the quota for face-to-face interviewers.

Push-to-web letters were sent over three weeks prior to the start of face-to-face fieldwork so that the majority of interviews conducted via this methodology had been completed, and quotas for face-to-face could be adapted based on the responses achieved. While a minority of push-to-web interviews were completed after this point, the small number meant it was more straightforward to adapt quotas based on these responses.

This design was selected so that the final sample is balanced and representative of the UK population as a whole. However, please note that if the two methods are viewed separately, they will not be representative on their own. Only once they are merged do they align.

1.3 Fieldwork

Fieldwork took place between January 7th and April 16th 2025. On average an SU contained 154 addresses. Only one interview could be conducted per address. If more than one person in the household met the quota a respondent was selected using the birthday method (i.e. the person who will be the next to have a birthday).

Two methodologies were utilised for conducting interviews: CAPI (Computer Assisted Personal Interviewing) administered face-to-face, and push-to-web driven online interviewing. A further reserve methodology of postal surveys was offered to respondents as a back-up.

Before fieldwork began, three identical scripts were set up; a primary CAPI script, and secondary online script and reserve paper script to be printed in booklets.

Further details of the process for the two main methodologies are explained below.

1.3.1 Push-to-web interviewing

A sub-set of addresses within each of the 315 sampling units were selected to be sent a letter containing information about the purpose of the survey and an invitation to take part in the study via a URL link and unique ID. The letters also contained contact details for the BMG Research support-line should they have difficulties taking part (this included a freephone number and email address) along with FAQs about Ofcom and the study.

Respondents would have to go to URL link on their phone, tablet or computer, and enter the ID to access the survey. For ease of access a QR code linking to the

survey was also provided on the letter. The option to request a paper copy was also provided.

In order to understand how many letters to send, BMG used the response rate from the 2024 survey (7.6%) to extrapolate what number would need to be sent for 800 completes across the UK. This meant that an initial 10,539 letters were sent to UK households, equating to about 33 addresses per SU. The intended and actual response rates are detailed in the table below.

Target sample	Required response from 10,539	Interviews achieved	Actual response rate
800	7.6%	821	7.7%

This response rate will be used to inform the required letters should the methodology be used again in future.

Addresses who received letters were removed from the available sample for face-to-face interviewers, and were only approached for this methodology if they had specifically requested this via an option provided in the online survey.

Towards the end of fieldwork, a small targeted reminder was sent to addresses in sampling units where there was still a small deficit in the number of online responses required.

1.3.2 CAPI interviewing

Interviewers were assigned to each SU, and within this unit they were asked to achieve interviews which reflected the SU-level quotas based on age, gender and SEG. These quotas were adapted based on the responses achieved via the push-to-web methodology.

In order to help interviewers recruit their SEG targets, especially C2 grade respondents, each was given a SEG screener, which was to be used to ensure respondents matched the SEG requirement before starting each interview.

Using an individual link, specific to the address, the interviewers were instructed to conduct the interview in person on the doorstep, the interviewer using a tablet device to enter respondents' answers into the CAPI script with the aid of showcards for more complex questions. They were also provided with a limited number of paper copies which could be passed to respondents who were clearly interested in completing, but unable or unwilling to do so in person. However, these were only to be used when interviewers thought it was highly likely a respondent would complete via paper copy.

Interviewers would also occasionally be able to use warm-leads, collected when a respondent attempted to complete online but found their SU quota was full. These

were provided to interviewers to attempt contact and arrange an interview, but only where this individual fit within the required quotas.

1.3.3 Interviewer and respondent incentivisation

Interviewers were incentivised per completion they achieved. In order to encourage in person responses, they were paid more to complete via the CAPI than providing respondents with paper copies.

Respondents were offered a £10 shopping voucher for completing via any methodology.

1.3.4 Welsh language translation

For respondents in Wales, a Welsh language version of the survey was made available through a variety of formats. Letters translated into Welsh were mailed alongside English language version, and all interviewers operating in Wales were also provided with a translated introduction letter. Both of these letters had details about how to request English or Welsh language options to take part. These options are detailed below.

While doorstep interviewers who speak Welsh were not used as part of this project due to budget constraints and historic lack of demand, Welsh respondents were instead offered;

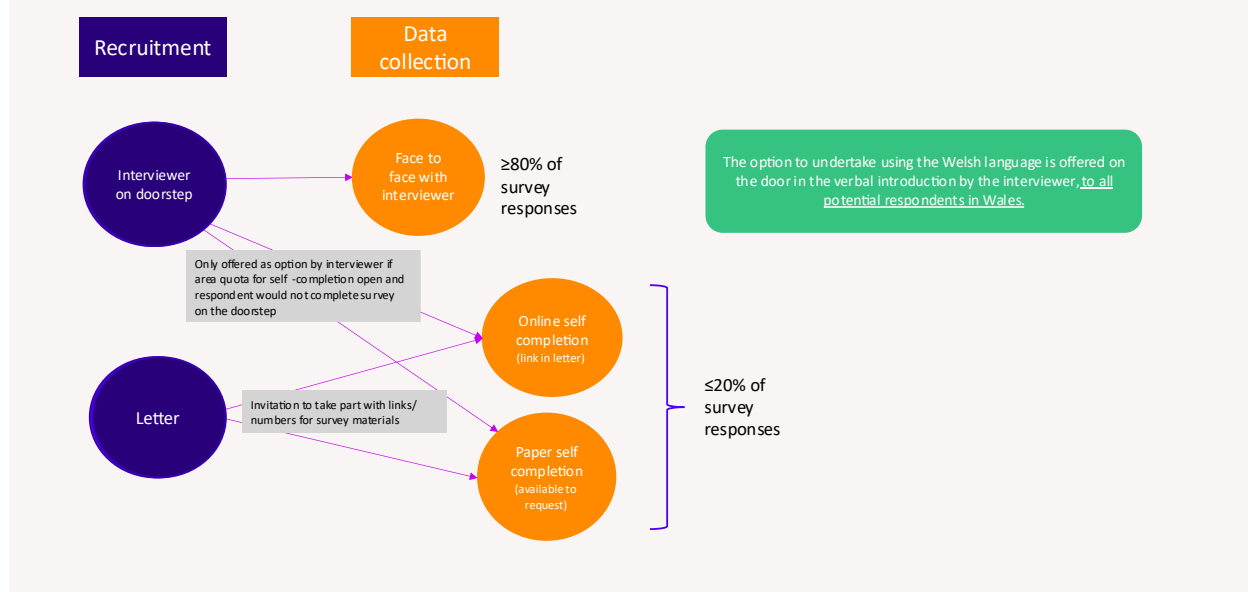
- The option to request an appointment for a Welsh speaking telephone interviewer to conduct the survey with them over the phone.
- Or they also had the option to request either an online or paper version of the survey translated into Welsh.

For those who were sent a letter to take part online, they were also offered the option to complete a Welsh translated survey either online or via paper copy.

Given the cost of translation, and the fact that no requests for a Welsh speaking version had been received in the previous three years of the Technology Tracker, BMG and Ofcom made the decision to only produce the Welsh version of the survey in the event that a request was received.

BMG received no requests for Welsh language options as part of the fieldwork for this project.

Overview of Tech Tracker fieldwork



1.4 Weighting

The survey data used for this report is weighted to ensure the data is representative of the UK population aged 16+. Data from all methodologies is weighted together under one process.

Rim weighting was applied to age, gender, SEG, working status, region and cabled/non-cabled. Cabled/non-cabled were defined using information on the coverage of different levels of broadband connection, supplied by Ofcom to BMG Research. Cabled areas were defined as postcode areas (first three digits of a postcode) which had at least 50% coverage of either gigabit or ultra-fast broadband.

A full unweighted and weighted breakdown of the final sample can be seen in the table below.

Demographic	Interviews achieved - unweighted	Weighted sample
Gender – Male	49%	48%
Gender – Female	51%	51%
Age – 16-34	25%	29%
Age – 35-54	34%	32%
Age – 55+	40%	38%

SEG – AB	23%	23%
SEG – C1	29%	32%
SEG – C2	21%	21%
SEG - DE	27%	23%
Working status – working	54%	59%
Working status – not working	46%	40%
Region – London	9%	13%
Region – South East	10%	14%
Region – South West	7%	9%
Region – East of England	7%	9%
Region – West Midlands	7%	9%
Region – East Midlands	5%	7%
Region – Yorkshire & Humber	6%	8%
Region – North East	3%	4%
Region – North West	8%	11%
Region – Scotland	12%	8%
Region – Wales	12%	5%
Region – Northern Ireland	12%	3%
Cable	64%	48%
Non-cable	36%	50%

The percentages described above as ‘% Weighted’ are the targets used to weight the data. The figures for age, gender, working status and location are taken from the 2021 Census¹. The ‘% Unweighted’ column shows the actual percentage of interviews achieved in the January to April 2025 fieldwork.

For the 2025 data, the quotas and sampling frame have continued to be based on the 2021 census. The update was made in 2024 to use 2021 census date instead of

¹ Figures for weighting are calculated at a UK-wide level, rather than at SU level as is done when designing the quotas

2011 census data. This update acknowledges shifts in the UK population over the past decade, including a rise in professional occupations, which has led to minor changes in sample design effects.

As a result, some historical year-on-year differences may reflect changes in sample profiles between 2023 and 2024 rather than actual shifts in service usage or access. The estimated impact was around 2–3% across several key metrics.

To ensure an adequate sample size for sub-group analysis in each of the devolved nations, respondents in these regions were purposefully oversampled. However, weighting ensures that the total sample is not skewed as the proportion of those in each region is adjusted to be representative.²

1.5 Reporting

Throughout the data tables, significant differences are signified between sub-groups and the total result. Differences to the total are signified by a + or – symbol next to the percentage figure, differences to other groups within the crossbreak set (e.g. region) are signified by letters below the percentage figure – these letters applied to each column appear below the crossbreak name. Differences are considered to be significant at the 95% confidence level, meaning that there is only a 5% possibility that the difference occurred by chance rather than by being a real difference. This is a commonly accepted level of confidence.

The data used in this report are rounded up or down to the nearest whole percentage. It is for this reason that, on occasion, tables or charts may add up to 99% or 101%. Results that do differ in this way should not have a sum-total deviance that is larger than around 1% to 2%.

In the tables and charts contained in this report, a * symbol denotes a proportion that is less than 0.5%, but greater than zero.

Because of the nature of the sample construction, quotas, and weighting used, when reporting it is necessary to state that the data represents the percentage of people aged 16+ rather than the percentage of households.

Within each wave of research, we ask a set of core questions relating to these topic areas: take-up and use of landline, mobile phone, internet, television, radio, devices, and subscription services. Other questions asked may vary wave on wave.

In the most recent wave, two questions were impacted by a routing error. This has meant that 134 of the 3415 who were supposed to answer both QE18 and QE18a did not do so.³

² 500 respondents were interviewed in each of Scotland, Wales, and Northern Ireland, but the weighted base is 332, 188, and 108 respectively.

³ QE18 - Which of the following communications service(s) have you used in the last 12 months to send instant messages, make online voice calls and/or make online video calls? / QE18a - Thinking about the communications service(s) you've used in the last 12 months, which – if any – of the

Both questions were intended to be routed to anyone who engaged in any of “instant messaging”, “making voice calls” or “making video calls” from either their mobile or other device at QE9 (codes 8-10).⁴ The routing was expanded during the design phase from the original intention to only show to QE9 codes 9-10, but this was not carried over to the script.

After fieldwork closed, several respondents were recontacted via telephone to collect their response, this meant that of the original 167 who were not asked this question, 33 were recovered.

For those who do use instant messages 3,282 (96% of all who said they do instant message) were still asked these questions. However, 134 who are missing are respondents who only use instant messengers and do not use online voice or video calls, and who weren’t reached as part of the recontacting exercise.

Appendix. Guide to statistical reliability

The variation between the sample results and the ‘true’ values (the findings that would have been obtained if everyone 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 rather than actual sample size to judge the accuracy of results. The following table compares effective sample size and unweighted sample for some of the main analysis groups.

Demographic	Unweighted base	Effective sample size
Gender – Male	1968	1306
Gender – Female	2069	1360
Age – 16-34	1016	687
Age – 35-54	1374	925
Age – 55+	1655	1078
SEG – AB	932	655
SEG – C1	1174	786

following activities have you engaged in when using those services? *See questionnaire for full answer codes.*

⁴ QE9 - For each activity listed below, please indicate whether you do each activity on a mobile phone and/or another device, or not at all. *See questionnaire for full answer codes.*

SEG – C2	820	537
SEG - DE	1071	681
Working status – working	2161	1471
Working status – not working	1833	1186
Region – London	374	322
Region – South East	411	317
Region – South West	267	217
Region – East of England	292	230
Region – West Midlands	270	217
Region – East Midlands	214	171
Region – Yorkshire & Humber	252	194
Region – North East	123	92
Region – North West	338	267
Region – Scotland	500	398
Region – Wales	504	454
Region – Northern Ireland	500	459

The table below illustrates the required ranges for different sample sizes and percentage results at the 95% confidence interval.

Effective sample size	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
Total – 2669	1.1%	1.5%	1.7%	1.9%	1.9%
Female – 1360	1.6%	2.1%	2.4%	2.6%	2.7%
SEG:C2 – 537	2.9%	3.8%	4.4%	4.7%	4.8%
Region: North East – 92	8.3%	11.1%	12.7%	13.7%	14.0%

For example, if 30% or 70% of a sample of 2,669 give a particular answer, the chances are 95 in 100 that the 'true' value will fall within the range of + 1.7 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 everyone has been interviewed). To test if the difference is a real one – i.e. if it is 'statistically significant' – we again must 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.

Effective sample size	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
Male – 1306 vs. Female – 1360	2.2%	2.9%	3.3%	3.6%	3.7%
London – 322 vs. Scotland – 398	5.7%	7.6%	8.7%	9.4%	9.7%