

Narrowband Review 2016

Questionnaires
February 2016



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1.1. Residential Consumers - Survey 1

SECTION 1: SCREENER

ASK IF EMPLOYED OR SELF-EMPLOYED (CODES 1, 2, 3, 5 or 6) AT WORK 2

S1a You previously mentioned that you <work full time / work part time / are self-employed>.
Do you ever work from home?
(SP)

1. Yes - Most of the time
2. Yes - occasionally
3. No

IF WORK FROM HOME MOST OF THE TIME (CODE 1 AT S1a) SAY:

For the rest of this survey we would like you to think about the way you use your home communications services for personal reasons, not for work purposes.

ASK ALL

S2. Which of the following do you have at home (either you personally or anyone else in the household)?
(MP, allow null)

1. Simple/feature mobile phone (a phone with simple features and limited media/internet functions)
2. Smartphone (e.g. Apple iPhone, Samsung Galaxy, BlackBerry, etc.)
3. Landline phone (i.e. home phone)
4. Fixed broadband internet
5. Mobile broadband (through a USB Modem or 'dongle')
6. Pay TV (e.g. Virgin Media, Sky, BT TV)
7. Voice over IP or VoIP (a way to make voice or video calls over the Internet e.g. by using Skype, Vonage or Facetime, including use on a smartphone, tablet, laptop or desktop computer)

CLOSE IF NO LANDLINE OR MOBILE

ASK ALL WITH MOBILE BUT NO LANDLINE (S2 = 1 OR 2 AND NOT 3)

S3. So can I confirm, you have a mobile phone but no landline home phone at this address?
(SP)

1. Yes - only mobile **CLOSE**
2. No - have landline as well - **INTERVIEWER TO RECOMPLETE S2**

ASK ALL

S4. Which of the following best describes your personal involvement in decisions regarding your home landline phone?
(SP)

1. Solely responsible
2. Jointly responsible with someone else
3. Someone else is primarily responsible

(New Screen)

INTERVIEWER: PLEASE DO NOT SHOW SCREEN UNTIL OTHERWISE INSTRUCTED

(DP: please underline DO NOT. notshowscreen)

ASK ALL

S6 And are you personally responsible for paying the landline home phone bill?
(SP)

1. Yes **GO TO Q1**
2. No **CLOSE**

(New Screen)

INTERVIEWER NB: FOR ALL FUTURE QUESTIONS WE WANT RESPONDENTS TO RESPOND ABOUT THEIR PERSONAL COMMUNICATIONS USAGE AND PREFERENCES - NOT ABOUT OTHERS IN THEIR HOUSEHOLD OR THE HOUSEHOLD AS A WHOLE.

Can this be set up as a dummy variable so we can check these samples on the topline(s)?

1. Landline + broadband + mobile (S2=3 AND S2=4 AND S2=1 OR 2)
2. Landline + broadband + no mobile (S2=3 AND S2=4 AND S2≠1 OR 2)
3. Landline + mobile + no broadband (S2=3 AND S2≠4 AND S2=1 OR 2)
4. Landline + no broadband + no mobile (S2=3 AND S2≠4 AND S2≠1 OR 2)

SECTION 2: SUPPLIERS USED

(New Screen)

INTERVIEWER: PLEASE SHOW SCREEN UNTIL OTHERWISE INSTRUCTED

(DP: please underline SHOW, showscreen)

ASK ALL

Q01a What is the name of the company that you pay for your landline (home phone) calls?
(SP, allow dk)

1. BT
2. EE/Everything Everywhere
3. Homecall
4. Kingston Communications
5. Post Office
6. Plusnet
7. Primus
8. Sky
9. Spacetel
10. Superline
11. Swiftcall
12. TalkTalk/AOL
13. Tesco Telecom

14. Tiscali
15. Toucan
16. Virgin Media (including NTL and Telewest)
17. Other (Please specify)

ASK ALL

Q02a Do you receive any of the following as part of your package from [insert provider from Q1]? **(MP, allow null and dk)**

1. Unlimited weekend calls to UK landlines
2. Unlimited evening and weekend calls to UK landlines
3. Unlimited calls to UK landlines at any time
4. Cheap calls to mobile phones
5. Cheap international calls
6. Broadband
7. Satellite or cable TV
8. Mobile phone
9. Something else (Please specify)

ASK ALL WITH BROADBAND (CODE 4) AT S2 THAT HAVE NOT CODED BROADBAND (CODE 6 AT Q02a)

Q02b What is the name of the company that you pay for your broadband services?
(SP, allow dk)

1. Advance Internet
2. AOL
3. BE
4. BT
5. Demon
6. Eclipse
7. EE/Everything Everywhere
8. Freesat
9. John Lewis
10. Kingston Communications
11. Now TV
12. O2
13. Orange
14. Plusnet
15. Post Office
16. Sky
17. Southern Electric
18. Supanet
19. TalkTalk
20. Tesco
21. Three (3) Mobile
22. TMobile
23. Top Up TV
24. Utilities Warehouse
25. Virgin Media
26. Vodafone
27. Zen
28. Other (Please specify)

ASK IF HAVE VoIP- S2 CODE 7

Q02c What is the name of your VoIP service provider(s)?
(MP, allow dk)

1. FaceTime (Apple FaceTime)
2. Google Hangouts
3. Skype
4. Viber
5. Vonage
6. WhatsApp
7. Other please Specify

ASK ALL

Q03 What were the main reasons for choosing <INSERT SUPPLIER FROM Q1> as your current landline (home phone) call provider?
(MP, randomise, allow dk)

1. Overall price of the call package
2. Unlimited weekend calls to UK landlines
3. Unlimited evening and weekend calls to UK landlines
4. Unlimited calls to UK landlines at any time
5. Cheap calls to mobile phones
6. Cheap international calls
7. Quality of phone service (line/connection/sound)
8. Quality of customer service
9. Well-known / trusted brand
10. I chose the <insert broadband / satellite or cable TV / Mobile phone if coded at Q2a> first (the home phone was a necessary or cheap add-on or was included in my package)
11. They've always provided my landline
12. Something else (PLEASE SPECIFY)

ASK IF LANDLINE (HOME PHONE) CALLS AND BROADBAND PROVIDERS ARE DIFFERENT (BROADBAND (CODE 6) NOT SELECTED AT Q02a)

Q04 Why do you use <INSERT PROVIDER CODED Q02b> for your broadband services, rather than using <INSERT PROVIDER CODED Q01A> for your broadband and your landline calls?
(MP, allow null)

INTERVIEWER PROMPT: Why else?

1. Good/better/cheaper deal overall
2. Value for money
3. Reliability of service
4. Faster broadband speeds/faster internet access
5. Bigger download allowance/unlimited downloads
6. Broadband was not provided free as part of my bundled package
7. Offer internet calling/VoIP
8. Quality of customer service
9. No reason to change/too much hassle to change/always used them
10. Didn't know I could switch my broadband to my landline call supplier
11. My landline call supplier doesn't provide broadband
12. Other (Please specify)

ASK IF DO NOT HAVE BROADBAND AS PART OF PACKAGE AT Q02a (NOT CODE 6 AT Q02a)

Q04c Which of these statements best describes the main reason why you do not take up a bundle of services from <INSERT PROVIDER CODED Q01a> that includes broadband?
(SP, allow null)

1. Do not use broadband
2. Have alternative access to fixed broadband
3. Use mobile broadband
4. Price of fixed broadband
5. Can't get broadband
6. Other (Please specify)

SECTION 3: SWITCHING/SUBSTITUTION
ASK FOR RELEVANT SERVICES CODED AT S2

Q05ai Have you switched the company that provides your [coded at Q52] in the last 12 months?
(SP FOR EACH ROW)

IF USE ...	Yes	No	Not sure
(IF Q52=3) Landline (home phone) call service	1	2	3
(IF Q52=4) Fixed broadband service	1	2	3
(IF Q52=6) Pay TV service	1	2	3

ASK IF USE VOIP AT S2 (CODE 7)

Q5aii Have you ever used another VoIP service instead of the one(s) you use now? (SP)

1. Yes
2. No
3. Not sure

ASK FOR EACH SERVICE SWITCHED AT Q5aii AND Q5aii: ASK Q5b/c FOR FIRST SERVICE SWITCHED, THEN REPEAT FOR SECOND, THEN THIRD, ETC

Q05b Which <INSERT NAME OF SERVICE FROM Q05Ai> company did you switch from?

USE RELEVANT LANDLINE, BROADBAND AND VOIP LISTS FROM Q01a/Q02b/Q02c

Pay TV List

1. BT
2. Sky
3. TalkTalk
4. Virgin Media
5. Other (Please specify)

Q5c Why did you switch your <INSERT NAME OF SERVICE FROM Q05A>?
(MP, randomise, allow dk)

1. For a better/cheaper price/deal
2. Poor service from previous supplier
3. Good experience with new supplier for other services/previously
4. To bundle two or more services together with one supplier/for Convenience
5. Better range of price plans
6. New supplier recommended by someone I know
7. More reliable service

LANDLINE SPECIFIC

8. Wanted a specific deal or tariff (e.g. all inclusive minutes)

BROADBAND SPECIFIC

9. Faster broadband speeds/faster internet access
10. Wanted bigger download allowance

PAY TV SPECIFIC

11. Wanted HD or 3D services
12. Wanted additional TV services
13. Wanted a better set-top box
14. Wanted specific content e.g. sports, movies, Sky Atlantic

VOIP SPECIFIC

15. Difficulty connecting with other users/keeping the connection
16. Poor call quality - e.g. jittery calls/echos/time delays/calls being dropped
17. Friends/family no longer using

18. Other (Please specify)

ASK FOR EACH SERVICE THEY HAVEN'T SWITCHED IN LAST 12 MONTHS (ALL CODED 2 OR 3 AT Q05ai)

Q05d Have you ever switched your <INSERT NAME OF SERVICE FROM Q5A>?
(SP FOR EACH ROW)

IF USE ...	Yes	No	Not sure
(IF S2=3) Landline (home phone) call service	1	2	3
(IF S2=4) Fixed broadband service	1	2	3
(IF S2=6) Pay TV service	1	2	3

SECTION 4: DECISION MAKING

We'd now like you to think about the calls you've made from home over the last year.

ASK ALL - REPEAT FOR 'MOBILE PHONE' AND 'VoIP' IF HELD AT S2

Q06. How often did you use your landline to make calls to other people? How often did you use your 'MOBILE PHONE', 'VoIP' IF HELD AT S2> to contact other people when you could easily have used your landline instead? Is it...?

	Landline (home phone)	Mobile	VoIP
Daily	1	1	1
Few times a week	2	2	2
Once a week	3	3	3
1-3 times a month	4	4	4
Less often than this	5	5	5
Haven't used it at all in last year	6	6	6

ASK FOR ALL SERVICES USED AT Q6 (CODES 1-5)

IF ONLY LANDLINE USED AT Q6, ASK Q07 BUT SUPPRESS TEXT AT END OF EACH QUESTION "rather than your..."

Q07 Why do you choose to use your <service> for making calls from home rather than your <other services used>?

INTERVIEWER PROBE: What other reasons?

(MP, randomise, allow dk)

1. Price
2. Convenience/ease of use
3. Always used it
4. Reliability/quality of service/coverage
5. Quality of sound
6. So can use 'free'/pre-paid/bundled/time-specific minutes
7. Have used up all 'free'/pre-paid/bundled minutes
8. It's part of a product bundle
9. The number is stored on the handset
10. Picture messaging
11. Video messaging
12. Tied into contract
13. Difficult to switch
14. Someone else using other line
15. When phone is next to me
16. When the call is urgent
17. Somebody else pays for this service / it's free
18. Other (Please specify)

ASK ALL

Q08 To what extent do you agree or disagree with the following statement about your landline (home phone)?
Under certain circumstances, I would be prepared to give up the ability to make calls from my landline
Please use this scale.
(SP, allow dk)

- 1: Agree strongly
- 2: Agree slightly
- 3: Neither agree nor disagree
- 4: Disagree slightly
- 5: Disagree strongly

IF Q08=1 OR 2

Q09 Why would you be prepared to give up the ability to make calls from your landline in the future?

INTERVIEWER NB: PROBE: What other reasons?
(MP, allow dk)

1. Only need it for internet
2. Price of making calls on my landline was too high
3. I don't place a high value on making calls from my landline
4. Reliability of connection
5. Quality of line/calls
6. Quality of customer service
7. Inconvenient/easier to use mobiles
8. Inconvenient/easier to use VoIP
9. Other (Please specify)

ASK IF USE MOBILE AT Q06 (CODES 1-5)

Q10 Why don't you make ALL your calls by mobile phone when you are at home?
(MP, allow dk)

1. Not applicable/already make most most/all calls by mobile
2. The price of calls/certain calls are too high
3. Reliability of connection
4. Quality of line/calls
5. Coverage/can't get a signal
6. Inconvenient/Difficult to use
7. Concerned about impact on health
8. Other (Please specify)

ASK IF USE VOIP AT Q06 (CODES 1-5)

Q12 Why don't you use VoIP more often at home instead of making calls on your landline?
(MP, allow dk)

1. Not applicable/already use VoIP instead of landline
2. Reliability of connection
3. Not suitable for certain types of conversation
4. Quality of line/calls
5. Inconvenient/Difficult to use
6. Other (Please specify)

ASK IF HAVE INTERNET AT S2 - CODES 2, 4 OR 5 (FOR EMAIL/INSTANT MESSEAGING OPTIONS) OR IF USE MOBILE AT Q6 - CODES 1-5 (FOR EMAIL/MOBILE PHONE TEXT OPTIONS)

Q13 Why don't you use [email], [mobile phone texts (SMS messages)] or [instant messaging via an App, (such as Facebook messenger, WhatsApp, Snapchat)] more often at home, instead of making calls on your landline?
(MP, allow dk)

1. Not applicable/already use email instead of landline
2. I don't use email
3. I don't use mobile phone texts
4. I don't use instant messaging
5. My friends/family don't use email
6. My friends/family don't use mobile phone texts
7. My friends/family don't use instant messaging
8. Reliability of connection
9. Coverage/black spots
10. Not suitable for certain types of conversation
11. Prefer to talk to the other person
12. Conversation is too public
13. Takes too long to type/ a voice call is quicker
14. No good when you need an immediate response
15. Inconvenient/difficult to use
16. Other (Please specify)

ASK FOR EACH PRODUCT HELD THAT ARE USED AT Q06 (CODES 1-5)

IF ONLY LANDLINE USED AT Q06, ASK Q15 BUT SUPPRESS TEXT AT END OF EACH QUESTION "rather than (product used)"

Q15 Thinking about the calls you make from home, what types of numbers are you more likely to call using your <service> rather than your <other services used>?
INTERVIEWER: PROBE: What other numbers?
(MP, allow null and dk)

1. Local landline numbers (i.e. calls within your same dialing code)
2. National landline numbers (i.e. calls within the UK that aren't within your same dialing code)
3. International numbers
4. Non geographical numbers e.g. 084 or 087 numbers
5. Premium rate numbers e.g. 09 numbers
6. Freephone numbers e.g. 0800 numbers
7. Numbers on friends and family plan
8. Mobile phone numbers (unspecified)

9. Mobile phone numbers in same network
10. Other VoIP users (If S2=7)
11. Other (Please specify)

REPEAT FOR ALL PRODUCTS USED BEFORE MOVING ONTO Q16

ASK IF USE LANDLINE FOR CALLS AT Q06 (CODES 1-5 for landline)

You've said that you use your landline to make calls to other people [INSERT RESPONSE FROM Q06 - on a daily basis/a few times/once a week/1-3 times a month/less often than once a month]

Q16a If the overall monthly price of your landline calls were to increase by 10%, how likely would you be to do each of the following?

When answering, please assume that the monthly price offered by other land line providers would also increase by 10%, but the prices offered by providers of mobile, VoIP or other forms of communication services would remain the same.

Firstly, how likely would you be to...

RANDOMISE ORDER OF STATEMENTS (SP and allow dk/not applicable)

- A. Not change any aspect of your landline call behaviour (ALWAYS SHOW THIS FIRST)
- B. Switch some calls from landline to mobile phone
- C. Switch some calls from landline to VoIP
- D. Switch some calls from landline to email, mobile phone texts or instant messages
- E. Give up my landline and only rely on mobile and broadband call services

	A	B	C	D	E	F	G
Certain to	1	1	1	1	1	1	1
Very likely	2	2	2	2	2	2	2
Fairly likely	3	3	3	3	3	3	3
Fairly unlikely	4	4	4	4	4	4	4
Very unlikely	5	5	5	5	5	5	5
Certain not to	6	6	6	6	6	6	6

ASK IF USE LANDLINE FOR CALLS AT Q06 (CODES 1-5 for landline)

Q16b By what percentage would the overall monthly price of your landline calls have to increase for you to change the number of calls you make from your landline or use an alternative means of calling?

When answering please assume that the monthly price offered by providers of mobile, VoIP or other forms of communication services would remain the same.

PROBE FOR BEST ESTIMATE IF UNSURE

Write in percentage _____%

ASK IF USE LANDLINE FOR CALLS AT Q06 (CODES 1-5 for landline)

Q17a If the overall monthly price of your total landline bill including the line rental were to increase by 10% how likely would you be to do each of the following.

When answering, please assume that the monthly price offered by other land line providers would also increase by 10%, but the prices offered by providers of mobile, VoIP or other forms of communication services would remain the same.

Firstly, how likely would you be to...

RANDOMISE ORDER OF STATEMENTS. (SP, allow dk and not applicable)

- A. Not change any aspect of your landline call behaviour (ALWAYS SHOW THIS FIRST)
- B. Switch some calls from landline to mobile phone
- C. Switch some calls from landline to VoIP
- D. Switch some calls from landline to email, mobile phone texts or instant messages
- E. Give up my landline and only rely on mobile and broadband call services

	A	B	C	D	E	F	G
Certain to	1	1	1	1	1	1	1
Very likely	2	2	2	2	2	2	2
Fairly likely	3	3	3	3	3	3	3
Fairly unlikely	4	4	4	4	4	4	4
Very unlikely	5	5	5	5	5	5	5
Certain not to	6	6	6	6	6	6	6

ASK IF USE LANDLINE FOR CALLS AT Q06 (CODES 1-5 for landline)

Q17b By what percentage would the overall monthly price of your overall landline bill have to increase for you to change the number of calls you make from your landline or use an alternative means of calling?

Again, when answering, please assume that the monthly price offered by providers of mobile, VoIP or other forms of communication services would remain the same.

PROBE FOR BEST ESTIMATE IF UNSURE

Write in percentage _____%

ASK FOR EACH CODE SELECTED AT Q15 (EXCEPT FREEPHONE NUMBERS '0800').

IF DON'T KNOW OR NONE SKIP TO QQ19

Q18 You mentioned earlier you were more likely to make calls to <insert call types from QQ15 for landline> on your landline. If the monthly cost of making calls on your landline were to increase by 10%, how likely would you be to make these types of calls by other means (such as by mobile or VoIP for example)? Please use this scale.

(SP, allow dk)

Certain to 1
 Very likely..... 2
 Fairly likely 3
 Fairly unlikely 4
 Very unlikely 5
 Certain not to 6

REPEAT FOR EACH CODE SELECTED AT QQ15.

ASK ALL

Q19 Next I am going to read out some statements that other people have made about the cost of communications services. Please tell me how much you agree or disagree with them using this scale.

RANDOMISE ORDER OF STATEMENTS (SP, ALLOW DK)

	Agree strongl y	Agree slightl y	Neithe r agree or disagre e	Disagr ee slightl y	Disagr ee strongl y
I don't tend to look at my communications bills in any detail	1	2	3	4	5
I like to keep an eye on my landline bill as costs can spiral out of control if I'm not careful	1	2	3	4	5
The cost of my landline is bundled up with other products and I think of the cost of the whole bundle rather than any individual component	1	2	3	4	5

1.2. Residential Consumers - Survey 2

SECTION 1: SCREENER

(New Screen)

INTERVIEWER: PLEASE SHOW SCREEN UNTIL OTHERWISE INSTRUCTED

(DP: please underline SHOW, showscreen)

(COMPUTING - ALL REFS, NULLS AND DKS SHOULD BE HIDDEN RESPONSES)

The next section is being conducting for Ofcom.

Ofcom are the independent regulator and competition authority for the UK communications industries.

The aim of this section is to find out the opinions and needs of people regarding different communications types, and how they choose them when they need to contact other people.

The first few questions are for classification purposes and will help us to analyse the results of the survey.

ASK IF EMPLOYED OR SELF-EMPLOYED (CODES 1, 2, 3, 5 or 6) AT WORK 2

S1a You previously mentioned that you <work full time / work part time /are self-employed>.

Do you ever work from home?

(SP)

1. Yes - Most of the time
2. Yes - occasionally
3. No

IF WORK FROM HOME MOST OF THE TIME (CODE 1 AT S1a) SAY:

For the rest of this survey we would like you to think about the way you use your home communications services for personal reasons, not for work purposes.

ASK ALL

S2. Which of the following do you have at home (either you personally or anyone else in the household)?
(MP,allow null)

1. Simple/feature mobile phone (a phone with simple features and limited media/internet functions)
2. Smartphone (e.g. Apple iPhone, Samsung Galaxy, BlackBerry, etc.)
3. Landline phone (i.e. home phone)
4. Fixed broadband internet
5. Mobile broadband (through a USB Modem or 'dongle')
6. Pay TV (e.g. Virgin Media, Sky, BT TV)
7. Voice over IP or VoIP (a way to make voice or video calls over the Internet e.g. by using Skype, Vonage or Facetime, including use on a smartphone, tablet, laptop or desktop computer)

CLOSE IF NO LANDLINE OR MOBILE

ASK ALL WITH MOBILE BUT NO LANDLINE (S2 = 1 OR 2 AND NOT 3)

S3. So can I confirm, you have a mobile phone but no landline home phone at this address?
(SP)

1. Yes - only mobile **CLOSE**
2. No - have landline as well - **INTERVIEWER TO RECOMPLETE S2**

ASK ALL

S4. Which of the following best describes your personal involvement with purchasing decisions regarding your home landline phone?
(SP)

1. Solely responsible
2. Jointly responsible with someone else
3. Someone else is primarily responsible

(New Screen)

INTERVIEWER: PLEASE DO NOT SHOW SCREEN UNTIL OTHERWISE INSTRUCTED

(DP: please underline DO NOT. notshowscreen)

ASK ALL

S6 And are you personally or jointly responsible for paying the landline home phone bill?
(SP)

1. Yes - solely responsible **GO TO Q01a1**
2. Yes - jointly responsible with someone else **GO TO Q01a**
3. No **CLOSE**

(New Screen)

INTERVIEWER NB: FOR ALL FUTURE QUESTIONS WE WANT RESPONDENTS TO RESPOND ABOUT THEIR PERSONAL COMMUNICATIONS USAGE AND PREFERENCES - NOT ABOUT OTHERS IN THEIR HOUSEHOLD OR THE HOUSEHOLD AS A WHOLE.

Can this is be set up as a dummy variable so we can check these samples on the topline?)

1. Landline + broadband + mobile (S2=3 AND S2=4 AND S2=1 OR 2)
2. Landline + broadband + no mobile (S2=3 AND S2=4 AND S2≠1 OR 2)
3. Landline + mobile + no broadband (S2=3 AND S2≠4 AND S2=1 OR 2)
4. Landline + no broadband + no mobile (S2=3 AND S2≠4 AND S2≠1 OR 2)

SECTION 2: SUPPLIERS USED

(New Screen)

INTERVIEWER: PLEASE SHOW SCREEN UNTIL OTHERWISE INSTRUCTED

(DP: please underline SHOW, showscreen)

ASK ALL

**Q01a What is the name of the company that you pay for your landline (home phone) calls?
(SP, allow dk)**

1. BT
2. EE/Everything Everywhere
3. Homecall
4. Kingston Communications
5. Post Office
6. Plusnet
7. Primus
8. Sky
9. Spacetel
10. Superline
11. Swiftcall
12. TalkTalk/AOL
13. Tesco Telecom
14. Tiscali
15. Toucan
16. Virgin Media (including NTL and Telewest)
17. Other (Please specify)

ASK ALL

Q02a Do you receive any of the following as part of your package from [insert provider from Q1]? (MP, allow null and dk)

1. Unlimited weekend calls to UK landlines
2. Unlimited evening and weekend calls to UK landlines
3. Unlimited calls to UK landlines at any time
4. Cheap calls to mobile phones
5. Cheap international calls
6. Broadband
7. Satellite or cable TV
8. Mobile phone
9. Something else (Please specify)

ASK ALL

QA3a. Why do you have a landline?

INTERVIEWER PROBE: What other reasons?

(MP, allow dk)

1. To make calls
2. To receive calls
3. Need a landline to get broadband
4. Need a landline to get access to pay TV
5. In case of emergencies
6. More reliable than mobile
7. Something else (Please specify)

ASK IF MORE THAN ONE REASON AT QA3a

QA3b. What is your main reason for having a landline?

(SP, allow dk)

1. To make calls
2. To receive calls
3. Need a landline to get broadband
4. Need a landline to get access to pay TV
5. In case of emergencies
6. More reliable than mobile
7. Something else (Please specify)

ASK ALL WITH BROADBAND (CODE 4) AT S2 THAT HAVE NOT CODED BROADBAND (CODE 6 AT Q02a)

Q02b What is the name of the company that you pay for your broadband services?

(SP, allow dk)

1. Advance Internet
2. AOL
3. BE
4. BT
5. Demon
6. Eclipse
7. EE/Everything Everywhere
8. Freesat
9. John Lewis
10. Kingston Communications
11. Now TV
12. O2
13. Orange
14. Plusnet
15. Post Office
16. Sky
17. Southern Electric
18. Supanet
19. TalkTalk
20. Tesco
21. Three (3) Mobile
22. TMobile
23. Top Up TV
24. Utilities Warehouse
25. Virgin Media
26. Vodafone
27. Zen
28. Other (Please specify)

(New Screen)

INTERVIEWER: PLEASE DO NOT SHOW SCREEN UNTIL OTHERWISE INSTRUCTED

(DP: please underline DO NOT. notshowscreen)

ASK ALL

Q03 What were the main reasons for choosing <INSERT SUPPLIER FROM Q1> as your current landline (home phone) call provider?

(MP, randomise, allow null, dk)

1. Good/better deal overall
2. Price of overall calls package
3. Price of calls to mobile phones
4. Price of international calls
5. Quality of line/calls
6. Paid for as part of a bundled package
7. Provided free as part of bundled package
8. Unlimited weekend calls to UK landlines
9. Unlimited evening and weekend calls to UK landlines
10. Unlimited anytime calls to UK landlines
11. Offer internet calling/ VOIP
12. Quality of customer service
13. Well-known and trusted brand
14. No reason to change
15. Too much hassle to change
16. Historical reasons/always used them
17. Friends and family use them
18. Other suppliers are more expensive
19. Other suppliers have worse line/call quality
20. Other suppliers have worse customer service
21. Not aware of other suppliers
22. Reliable service
23. Something else (PLEASE SPECIFY)

ASK IF LANDLINE (HOME PHONE) CALLS AND BROADBAND PROVIDERS ARE DIFFERENT (BROADBAND (CODE 6) NOT SELECTED AT Q02a)

Q04 Why do you use <INSERT PROVIDER CODED Q02b> for your broadband services, rather than using <INSERT PROVIDER CODED Q01A> for your broadband and your landline calls?

(MP, allow null)

INTERVIEWER PROMPT: Why else?

1. Can't get broadband from calls supplier
2. Didn't know I could switch my broadband to the same supplier
3. Capacity/speed issues
4. Price of line rental
5. Price of landline calls
6. Good/better deal overall
7. Quality of line/calls
8. Offer internet calling/ VOIP
9. Quality of customer service from current broadband supplier
10. Well-known and trusted supplier for broadband
11. Always used them for broadband

12. Other (Please specify)

(New Screen)

INTERVIEWER: PLEASE SHOW SCREEN UNTIL OTHERWISE INSTRUCTED

(DP: please underline SHOW, showscreen)

ASK IF DO NOT HAVE BROADBAND AS PART OF PACKAGE AT Q02a (NOT CODE 6 AT Q02a)

Q04c Which of these statements best describes the main reason why you do not take up a bundle of services from <INSERT PROVIDER CODED Q01a> that includes broadband?
(SP, allow null)

1. Do not use broadband at all
2. Have alternative access to fixed broadband
3. Use mobile broadband instead of fixed broadband
4. Price of fixed broadband
5. They don't offer broadband at all
6. They don't supply fixed broadband in my area
7. I'm waiting for my current subscription to run out
8. I've been offered better deals
9. Other (Please specify)

ASK USE LANDLINE TO MAKE CALLS (CODE 1 AT QA3a)

QA8. Which of the following describes how you buy your calls?
(MP, allow null/DK)

1. I use the same supplier that provides my line rental for calls [including calls that are bundled free with line rental and any other paid calls/bundles]
2. I buy calls from a different supplier by dialing a prefix
3. I use a calling card when dialing
4. Other (please specify)

(New Screen)

INTERVIEWER: PLEASE DO NOT SHOW SCREEN UNTIL OTHERWISE INSTRUCTED

(DP: please underline DO NOT. notshowscreen)

ASK WHO USE LINE RENTAL PROVIDER FOR CALLS (CODE 1 AT QA8)

QA9. Why do you use the same company for both your line rental and calls?

(MP, allow null/DK)

1. Good/better deal overall
2. Quality of line / calls
3. Paid for as part of a bundled package
4. Provided free as part of bundled package
5. Offer internet calling / VoIP
6. Quality of customer service
7. Well-known and trusted brand
8. No reason to change
9. Too much hassle to change
10. Historical reasons/ always used them
11. Friends and family use them
12. Other suppliers are more expensive
13. Other suppliers have worse line / call quality
14. Other suppliers have worse customer service
15. Not aware of other suppliers
16. Reliable service
17. Easier/more convenient to have both with the same supplier
18. Other (Please specify)

ASK ALL WHO USES DIFFERENT PROVIDERS FOR CALLS AND LINE RENTAL (CODE 2-3 AT QA8)

QA10. Why do you buy line rental and calls from different companies?

(MP, allow null/DK)

1. Cheaper to buy separately
2. There was an offer on line rental
3. There was an offer on calls
4. I rarely make calls on a phone line
5. Line rental was bundled with broadband
6. Calls were bundled with broadband
7. Other (Please specify)

(New Screen)

INTERVIEWER: PLEASE SHOW SCREEN UNTIL OTHERWISE INSTRUCTED

(DP: please underline. SHOW showscreen)

ASK ALL WHO USE DIFFERENT PROVIDERS FOR CALLS AND LINE RENTAL (CODE 2-3 AT QA8)

ASK SEPARATE QUESTIONS FOR 'PREFIX' AND 'CALLING CALL', IF THEY USE BOTH

A11. What type of calls do you use your [prefix]/[calling card] for?

(MP, allow null/DK)

1. Calls to local landline numbers, i.e. calls within your same dialing code
2. Calls to national landline numbers, i.e. calls within the UK that aren't within your same dialing code
3. International numbers
4. Non-geographical numbers, e.g. 084 or 087 numbers
5. Premium rate numbers, e.g. 09 numbers
6. Freephone numbers, e.g. 0800 numbers
7. Numbers on friends and family plan
8. Mobile phone numbers
9. VoIP users
10. Other (please specify)

ASK ALL

A12. Which of the following statements best describes how you think about your phone costs?

(SP, allow dk)

1. I think about the costs for line rental and calls separately
2. I think about the costs for line rental and calls together

(New Screen)

INTERVIEWER: PLEASE SHOW SCREEN UNTIL OTHERWISE INSTRUCTED

(DP: please underline SHOW, showscreen)

ASK ALL

Q08 To what extent do you agree or disagree with the following statement about your landline (home phone)?

Under certain circumstances, I would be prepared to give up the ability to make calls from my landline

Please use this scale.

(SP, allow dk)

- 1: Agree strongly
- 2: Agree slightly
- 3: Neither agree nor disagree
- 4: Disagree slightly
- 5: Disagree strongly

(New Screen)

INTERVIEWER: PLEASE DO NOT SHOW SCREEN UNTIL OTHERWISE INSTRUCTED

(DP: please underline DO NOT. notshowscreen)

ASK IF PREPARED TO GIVE UP CALLS (CODE 1-2 AT Q08)

QA14. Under which circumstances would you be prepared to give up the ability to make calls from your landline in the future?

INTERVIEWER PROBE: Which other circumstances?

(MP, allow dk)

1. If I didn't need to have a landline in order to get Broadband
2. If it reduced the price of my line rental (and I could still use fixed broadband)
3. If the price of making calls on my landline was too high
4. If I didn't place a high value on making calls from my landline
5. If the reliability of connection wasn't good enough
6. If the quality of customer service wasn't good enough
7. If it was more convenient/easier to use mobiles
8. If it was cheaper to use mobiles
9. If it was more convenient/easier to use VoIP
10. Other (Please specify)

ASK IF NOT PREPARED TO GIVE UP CALLS (CODE 4-5 AT Q08)

A15. Why would you not be prepared to give up the ability to make calls from your landline in the future?

INTERVIEWER PROBE: What other reasons?

(MP, allow dk)

1. I need the landline in order to access broadband
2. Price of making calls from landline is low /good value
3. I prefer to make calls from my landline
4. Reliability of connection
5. Quality of customer service
6. Don't have/use mobile(s)
7. Less convenient/less easy to use mobiles
8. Don't have/use VoIP
9. Less convenient/less easy to use VoIP
10. No reason to change
11. Too much hassle to change
12. Historical reasons/always used
13. Already have equipment for these calls
14. Other (please specify)

Finally we would like to ask you a few questions about yourself.

ASK ALL LANDLINE USERS THAT MAKE CALLS (CODE 1 AT QA3a)

C1 Approximately how often do you make calls on your home landline?

(SP)

1. Every day
2. Every couple of days
3. Several times a week
4. Weekly
5. Fortnightly
6. Monthly
7. Less often
8. Never

ASK ALL LANDLINE USERS THAT RECEIVE CALLS (CODE 2 AT QA3a)

C2 Approximately how often do you receive calls on your home landline?

(SP)

1. Every day
2. Every couple of days
3. Several times a week
4. Weekly
5. Fortnightly
6. Monthly
7. Less often
8. Never

ASK ALL BROADBAND USERS (CODE 4 AT S7)

C3 Approximately how often do you access the internet through your home broadband?

(SP)

1. Every day
2. Every couple of days
3. Several times a week
4. Weekly
5. Fortnightly
6. Monthly
7. Less often
8. Never

1.3. Business Consumers (SME) - Survey 1

SECTION 1: SCREENER

INTRODUCTION:

Good morning/afternoon, my name is _____ from Jigsaw Research and I am calling on behalf of Ofcom, the regulator for the communications industries in the UK. Ofcom currently needs to understand how businesses make decisions about what service to use when they want to make phone calls from work.

Could I speak to someone who has responsibility, either solely or jointly, for making decisions about the telecommunications devices and applications used in this organisation? ADD IF NECESSARY this could be the owner/manager, MD, Financial director, office manager or IT /Telecoms manager.

YES, CONTINUE WITH SCREENER. IF REFUSED, THANK AND CLOSE

IF NECESSARY ADD:

- Your views are incredibly important in helping Ofcom to understand the challenges that businesses face when making decisions about communications services and the sort of advice, information or support that might make this easier.
- It should take around 20 minutes of your time, depending upon your answers.
- We would like to reassure you that this is a genuine piece of market research. No-one will try to sell you anything as a direct result of this research and the project is not designed to test your knowledge but to gauge your opinions and understand how you make decisions.
- We got your organisation name and telephone number from a standard list provider Sample Answers, a commercial database of businesses in the UK. We are interested in speaking to people responsible for IT and telecoms across a wide range of businesses.
- If you would like to check our credentials, you can call the Market Research Society, free of charge, on 0500 39 69 99.
- If you would like to verify that is a legitimate piece of research commissioned by Ofcom we can also email or fax you a letter that Ofcom have written for this purpose.
- The research is being conducted under the Code of Practice of the Market Research Society, which means that all of the answers you give are strictly confidential and anonymous. Participation in this survey is voluntary.

ONCE THROUGH TO CONTACT RESPONSIBLE REPEAT INTRO THEN ASK:

S1 Would it be convenient to go through the survey now? **SINGLE CODE**

Yes - now	1	CONTINUE
No - but willing to take part later	2	SCHEDULE APPT
No.....	3	SEEK REFERRAL S2

S2 Is there anyone else within your organisation that I could speak to about this?

Yes - now	1	CONTINUE
Yes - later	2	SCHEDULE APPT
No.....	3	CLOSE - SEEK REFERRAL

S3a Which of the following best describes your *personal* involvement with purchasing decisions regarding your organisation's telecoms and other communications services. Are you (READ OUT)? **SINGLE CODE**

Solely responsible.....	1	CONTINUE
Jointly responsible with somebody else	2	CONTINUE
Or is someone else primarily responsible	3	ASK TO BE REFERRED & GO BACK TO INTRODUCTION

S3b Can I just double check that can you comment in detail on your organisation's experiences using communications suppliers and services? **SINGLE CODE**

Yes.....	CONTINUE
No.....	ASK TO BE REFERRED AND GO BACK TO INTRODUCTION

ONCE THROUGH TO RIGHT PERSON:

S4 Could I please confirm your exact job title? **SINGLE CODE**

Owner / Proprietor	1
Partner / Managing Partner	2
Chief Executive Officer	3
Chief Finance Director / Finance Director	4
Chief Operations Director / Operations Director ...	5
Managing Director	6
IT / Telecoms Director / Manager / Other ITC specialist	7
Other senior manager / director.....	8
PA / Office manager	9
Other (WRITE IN).....	10
Refused	11

S5 RECORD FROM SAMPLE

INDUSTRY SECTOR

Primary	1
Manufacturing	2
Construction	3
Wholesale/Transport/Communications	4
Retail	5
Financial Services	6
Other services	7
Public admin and services.....	8
Other.....	9

MONITORING QUOTA

S6a Including yourself, how many people does your organisation currently employ in the UK either full or part time? **WRITE IN NUMBER - DO NOT ALLOW ZERO.**

IF DON'T KNOW, READ OUT LIST AND SINGLE CODE ACCORDINGLY

1	1
2-4.....	2
5-9.....	3
10-49.....	4
50-249	5
250+	CLOSE
Don't know	CLOSE
Refused	CLOSE

MONITORING QUOTA

ASK ALL

S6b Which of the following best describes the way you work?

READ OUT. CODE ONE ONLY

I run my business from home (IF S6=1)	1
I mainly work from home.....	2
I occasionally work from home but mainly work elsewhere	3
I never work from home	4

READ OUT IF HOME OFFICE (S6=1 AND S6b = 1)

For the rest of the interview, we would like you to focus just on your work related communications from your home office, not your personal communications.

S7 How long has your organisation been trading? **SINGLE CODE**

- Not yet actively trading 1 **CLOSE**
 Less than 2 years 2
 2-5 years 3
 6-9 years 4
 10-19 years..... 5
 20+ years 6
 Don't know..... 7
 Refused 8
 Not applicable 9

S8 How many sites or offices does your organisation operate from in the UK? **SINGLE CODE. RECORD WHOLE NUMBER. ALLOW UP TO SIX NUMBERS HERE.**

--	--	--	--	--	--

Don't know X
 Refused Y

ASK IF MORE THAN 1 SITE AT S8

S8a Does your involvement with purchasing decisions regarding your organisation's telecoms and other communications services extend to all sites, some sites or just the site you operate out of?

- All sites 1
 Some sites..... 2
 Just the site operating from 3

READ OUT IF MORE THAN 1 SITE AT S8

For the rest of the interview, where relevant we would like you to focus on <IF S8A=1 INSERT: all / IF S8A=2 OR 3 INSERT: just> the sites you have knowledge of.

S9a and S10a RECORD REGION AND POSTCODE FROM SAMPLE

S9b In which of these regions are you personally based for work? **READ OUT. SINGLE CODE**

- North East England 1
 North West England 2
 Yorkshire and the Humber 3
 East Midlands 4
 West Midlands 5
 East England 6
 London..... 7
 South East England 8
 South West England 9
 Wales10
 Scotland11

**MONITORING
 QUOTA**

Northern Ireland12

S10b RECORD POSTCODE

ASK ALL

S11 Has your organisation used any of the following communications services in the last month?
READ OUT EACH SERVICE, THEN READ OUT THE SCALE. CODE ONE FOR EACH SERVICE

NOTE FOR INTERVIEWERS: WE WANT RESPONDENTS TO ANSWER BASED ON THE TOTAL ORGANISATION WHEREVER POSSIBLE. INCLUDING ANY HOME WORKERS.

SERVICES:

- Standard landlines 1
 IF NECESSARY: *We are referring to PSTN (Public Switched Telephone Network) - basically the normal phone network or landline*
- Smartphones (e.g. Apple iPhone, Samsung Galaxy, BlackBerry, etc.) 2
- Standard mobile phones 3
- Fixed line broadband..... 4
- Mobile broadband through a USB Modem or 'dongle' 5
- ISDN 2/2e 6
 IF NECESSARY: *This is a form of ISDN line offering you connection for up to 8 digital devices and allowing you to make two calls at the same time*
- ISDN 30 7
 IF NECESSARY: *This is a form of ISDN line offering you 8 to 30 independent connections and allowing you to multiple calls at the same time*
- Leased lines or private circuits, including Ethernet leased line services¹ 8
- Voice over Internet Protocol or VoIP 9
 IF NECESSARY: *VoIP includes services that carry voice traffic over the internet, such as Skype and Vonage, and voice over IP services that a provider of communications services may offer, sometimes called IP Voice or SIP trunking services.*
- Video conferencing 10

¹ This is a bit different to other lines. The leased line does not offer a calls services. It may be an input used to provide access but the actual access service would be a traditional line or, more likely, an ISDN services (probably ISDN30). Alternatively, there could be an Ethernet leased line with VoIP running over it.

ASK IF HAVE NOT CODED 1 OR 4 OR 6-10 ABOVE

S12 Am I right in thinking that your organisation does not have any fixed line communications services?

CODE ONE ONLY

We don't 1 **CLOSE**
 We do 2 **GO BACK TO S11**

ASK SEPARATELY FOR EACH OF STANDARD LANDLINES (S11=1); ISDN 2/2E (S11 = 6); ISDN 30 (S11 = 7); LEASED LINES OR PRIVATE CIRCUITS (S11 = 8), IF USED

ASK SEPARATELY FOR EACH (IF CODED AT S11)

S13 What have you used < CODED AT S11> for, in the last month? Would it be ...

READ OUT. CODE ALL THAT APPLY

Outgoing voice calls 1
 Internet 2
 VoIP, including video calls (IF S11 = 9) 3
 Other videoconferencing services² (IF S11 = 10) 4

	READ OUT IF USE ...	Outgoing voice calls	Internet	VoIP, including video calls	Other video conferencing
A	Standard landlines (S11=1)	1	NA	NA	NA
B	ISDN 2/2e (S11=6)	1	2	3	4
C	ISDN 30 (S11=7)	1	2	3	4
D	Leased lines or private circuits (S11=8)	NA	2	3	4
E	Fixed line broadband (S11=4)	NA	2	3	4

NOTE TO OFCOM: WE'VE INCLUDED AN 'INCOMING CALLS' CATEGORY TO HELP THE FLOW OF THE INTERVIEW

IF CODE 1 AT S13D THEN READ OUT: You said you make outgoing voice calls over leased lines or private circuits? Can I check if this is correct or do you mean VoIP? **RECODE S13 IF NECESSARY**

CLOSE IF DON'T USE ANY OF STANDARD LANDLINE, ISDN 2/2e, ISDN 30 or leased LINES/PRIVATE CIRCUITS FOR OUTGOING CALLS OR IF DON'T USE VoIP³ (CODE 3 IN ROWS B - E AT S13)

ASK IF OUTGOING CALLS MADE ON MORE THAN 1 TYPE OF FIXED LINE AT S13. IF OUTGOING CALLS MADE ON ONLY 1 TYPE OF FIXED LINE THEN AUTOPUNCH THIS LINE TYPE AT S13i

² Videoconferencing can use either IP or traditional voice lines, particularly ISDN

³Comment SP: I don't think we should close it if they only use VoIP (i.e. don't code 2 but have some 5s) I think it is useful to carry on to understand why they don't use traditional voice anymore.

This could be very useful in understanding the potential constraints on traditional voice and to understand the popularity of managed versus un-managed VoIP.

S13i. From which of your fixed lines were most outgoing voice calls made during the last month?
READ OUT. SINGLE CODE

INTERVIEWER: RESPONDENT MUST ANSWER TO QUALIFY. IF DON'T KNOW, ASK FOR BEST ESTIMATE. IF SPLIT EVENLY BETWEEN MORE THAN ONE LINE, ASK WHICH THEY CONSIDER TO BE THE MAIN LINE.

Standard landline(s) (S13A = 1) 1
ISDN 2/2E line(s) (S13B = 1)..... 2
ISDN 30 line(s) (S13C = 1) 3
Leased Line(s) / Private Circuit(s) (S13D = 3) 4
Fixed line broadband (S13E=3) 5

IF CODED 9 AT S11

S13b Is your VoIP service provided by...
READ OUT. SINGLE CODE

The service provider that also provides your <insert all fixed line methods coded 1 at S13a-e> connection⁴ 1
A different service provider to the one that provides your <insert all fixed line methods coded 1 at S13a-e> connection⁵ 2
Both 3
Neither 4
(Don't Know) 5

IF CODED 9 AT S11

S13c Which of the following have you used VoIP for in the last month?
READ OUT. CODE ALL THAT APPLY

Internal or inter-site voice calls 1
Voice calls external to the business 2
Both 3
Neither 4
(Don't know)..... 5

⁴ Managed

⁵ Unmanaged

SECTION 2: PRODUCTS USED

READ OUT

We are now going to talk about the companies that provide your communications services.

FOR ALL LINE TYPES (A,B,C,D,E) CODED 1 (CALLS) OR 3 (VoIP) AT S13

Q1 What is the name of the company or companies that you pay for your <coded at S13>?
DO NOT READ OUT. MULTICODE

IF MORE THAN 1 COMPANY IS CODED FOR A SERVICE AT Q1 THEN ASK Q1ai

Q1ai And which company is the main provider of your [insert text below where respondent has more than one provider]?

SINGLE CODE

- a) Standard landline calls
- b) Standard landline rental
- c) ISDN 2/2e line calls
- d) ISDN 2/2e line rental
- e) ISDN 30 line calls
- f) ISDN 30 line rental
- g) Fixed line broadband
- h) VoIP calls made over your fixed line broadband
- i) Calls made over your leased line/ private circuit connection
- j) Leased line/ private circuit line rental

	1a	1b	1c	1d	1e	1f	1g	1h	1i	1j
Alcatel										
Alternative Networks										
BT										
Carphone Warehouse										
Chess										
Colt										
Claranet										
Daisy										
Demon										
DST (Directsave.com)										
Eclipse										
Everything Everywhere/EE										

Excel										
Gamma										
Global Crossing										
Homecall										
Intechnology										
KCom (Kingston Communications)										
Janet										
One Bill										
Orange										
O2 / BE										
Madasafish										
Pipex										
Plusnet										
Post Office										
Primus										
Sky / Skytalk										
Skype										
Southern										
South West										
Spacotel										
Spitfire										
Supanet										
Superline										
Swiftcall										
Talk Talk										
Tesco Telecom										
Titan										
thePhoneCoop										
T-mobile										
Tooway										
Toucan										
"3"										

CLOSE IF
DK CALL
PROVIDER
FOR MAIN
FIXED
METHOD
AT S13i

ASK Q4a FOR EACH SUPPLIER CODED AT Q1a OR Q1c OR Q1e OR Q1h OR Q1i (DEPENDING ON MAIN
FIXED LINE TYPE CODED AT S13i)

Good/better deal overall	1
Price of overall calls package	2
Price of calls to mobile phones	3
Price of international calls.....	4
Quality of line / calls	5
Provided free as part of bundled package	6
Unlimited weekend calls to UK landlines.....	7
Unlimited evening and weekend calls to UK landlines.....	8
Unlimited anytime calls to UK landlines.....	9
Offer internet calling / VoIP.....	10
Quality of customer service/ account management	11
Well-known and trusted brand	12

No reason to change	13
Too much hassle to change	14
Historical reasons/ always used them	15
Friends and family use them.....	16
Other suppliers are more expensive.....	17
Other suppliers have worse line / call quality	18
Other suppliers have worse customer service	19
Not aware of other suppliers	20
Wasn't around when original decision was made	21
Reliable service	22
Other (WRITE IN).....	23
None of the above	24

ASK Q4b FOR MAIN OUTGOING CALL FIXED LINE TYPE CODED AT S13i

ASK ALL WITH MAIN LINE OVER WHICH YOU MAKE CALLS AND FIXED LINE BROADBAND FROM DIFFERENT SUPPLIERS AT Q1ai/a vs g OR Q1ai/c or Q1ai/e vs. g

Q4b Thinking about your <INSERT MAIN FIXED LINE METHOD FROM S13i>, why do you use a different supplier for your fixed line broadband, rather than use your fixed voice calls supplier for broadband as well?

DO NOT READ OUT. CODE ALL THAT APPLY

Can't get broadband from voice call supplier	1
Didn't know I could switch my broadband to the same supplier	2
Capacity/speed issues	3
Price of fixed broadband	4
Price of overall calls package	5
Good/better deal overall	6
Quality of line / calls	7
Offer internet calling / VoIP	8
Quality of customer service.....	9
Well-known and trusted brand	10
Always used them	11
Other (WRITE IN).....	12
None of the above	13

ASK ALL - EXCEPT THOSE USING VOIP AS THEIR MAIN OUTGOING VOICE SERVICE

Q4ai The last time you agreed a contract for fixed line calling with your main fixed voice service provider, did you also discuss taking out VoIP services with them?

SINGLE CODE

Yes..... 1
 No..... 2
 Don't know, can't remember..... 3

SECTION 3: SWITCHING/ SUBSTITUTION

Q5a Have you switched the company that provides your [READ OUT SERVICES] in the last 12 months?

CODE ONE ONLY FOR EACH

	Yes	No	Not sure
Fixed voice calls (EACH CODE 1 (OUTGOING VOICE CALLS) AT S13)	1	2	3
Fixed line broadband (IF S11 = 4)	1	2	3

ASK IF USE VOIP AT S11 (CODE 9)

Q5ai Have you ever used another VoIP service instead of the one(s) you use now?

CODE ONE ONLY

Yes 1
 No..... 2
 Not sure 3

IF MORE THAN ONE SERVICE SWITCHED IN LAST 12 MONTHS: ASK Q5b/c FOR FIRST SERVICE SWITCHED, THEN REPEAT FOR SECOND, THEN THIRD, ETC

SHOW Q5B AND Q5C ON SAME SCREEN

Q5b Which <INSERT NAME OF SERVICE FROM Q5a> company did you switch from?

Q5c Why did you switch your <INSERT NAME OF SERVICE FROM Q5a>?

For a better/cheaper price/deal 1
 Poor service from previous supplier 2
 Good experience with new supplier for other services/previously 3
 To bundle two or more services together with one supplier/for Convenience4
 Better range of price plans 5
 New supplier recommended by someone I know.... 6
 More reliable service..... 7
 Wanted a specific deal or tariff (e.g. all inclusive minutes)..... 8

BROADBAND SPECIFIC

Faster broadband speeds/faster internet access ... 9
 Wanted bigger download allowance..... 10

VOIP SPECIFIC

Difficulty connecting with other users/keeping the connection 11
 Poor call quality - e.g. jittery calls/echos/time delays/calls being dropped 12
 Other - SPECIFY

ASK FOR EACH SERVICE THEY HAVEN'T SWITCHED IN LAST 12 MONTHS (ALL CODED 2 OR 3 AT Q5a)

Q5d Have you ever switched your <INSERT NAME OF SERVICE FROM Q5A>?

IF USE ...	Yes	No	Not sure
Outgoing voice calls	1	2	3
Fixed line broadband (IF S11 = 4)	1	2	3

SECTION 4: DECISION MAKING

We'd now like you to think about all the calls that have been made from your place of work ~~office~~ <IF HOME OFFICE INSERT: 'for business purposes'>, from fixed lines, i.e. via your <insert: Standard landlines, ISDN2/2e lines, ISDN30 lines, - SHOW IF THESE LINES ARE USED FOR OUTGOING CALLS (CODE 1) at S13)> over the last month. Please don't think about VoIP for now, we'll ask about this specifically in a minute.

ASK ALL - REPEAT FOR 'MOBILE PHONE' AND 'VoIP' IF HELD AT S11 (WHERE S11= 2, 3 OR 9)
 Q6. How often do you / your colleagues use <INSERT FIXED LANDLINES / MOBILE PHONES / VoIP IF HAVE AT S11> to contact other people <for MOBILE PHONES / VoIP include: while also within access of your landline phone>?

SHOW CARD FOR SCALE. CODE ONE ONLY FOR EACH.

	Fixed Landline	Mobile	VoIP
Daily	1	1	1
Few times a week	2	2	2
Once a week	3	3	3
1-3 times a month	4	4	4
Haven't used	5	5	5
Don't know	6	6	6

ASK FOR ALL SERVICES USED AT Q6 (CODES 1-4)

IF ONLY LANDLINE USED AT Q6, ASK Q7a BUT SUPPRESS TEXT AT END OF EACH QUESTION “rather than your...”

- Q7a** Why do you choose to use your <service> for making calls from your place of work rather than your <other services used>? **PROBE:** Are there any other reasons?
DO NOT READ OUT. CODE ALL THAT APPLY

Price	1
Convenience/ease of use.....	2
Always used it	3
Reliability/quality of service	4
Quality of sound	5
So can use ‘free’/pre-paid/bundled/time-specific	
Minutes	6
Have used up all ‘free’/pre-paid/bundled minutes	7
It’s part of a product bundle	8
The number is stored on the handset	9
Picture messaging	10
Video messaging	11
Tied into contract	12
Difficult to switch	13
Other (specify)	14
Don’t know.....	15

REPEAT FOR EACH SERVICE USED BEFORE MOVING ONTO Q7b**ASK IF USE FIXED LINE (CODES 1-4 AT Q6)**

IF HAVE MOBILE (S11 = 2 OR 3) AND USE MOBILE (Q6=1-4)

- Q7b** Why don’t you make all your work calls from mobile phones or smartphones instead of making calls via a fixed landline phone?
IF NECESSARY: Even if you are already making most of your office calls via mobile, we are still interested to know why you aren’t making ALL your calls this way
DO NOT READ OUT. CODE AS MANY AS APPLY

Price of equipment / kit	1
Price of calls/ certain calls too high	2
Reliability of connection	3
Quality of line / calls	4
Coverage / black spots	5
Quality of customer service.....	6
Inconvenient/Difficult to install	7
Inconvenient/Difficult to manage billing.....	8
Inconvenient/Difficult to use	9
Concerned about impact on health.....	10
Other (WRITE IN).....	11
Not sure	12

ASK IF USE FIXED LINE (CODES 1-4 AT Q6)

IF HAVE VOIP (S11 = 9) AND USE VOIP (Q6=1-4)

Q8a Why don't you use VOIP more often from ~~the office~~ your place of work instead of making calls via a fixed landline?

IF NECESSARY: Even if you are already making most of your office calls via VOIP, we are still interested to know why you aren't making ALL your calls this way

DO NOT READ OUT. CODE AS MANY AS APPLY

- Price of equipment / kit 1
- Price of calls (unspecified)..... 2
- Price of calls to landlines 3
- Price of calls to mobile phones 4
- Price of international calls..... 5
- Reliability of connection 6
- Quality of line / calls 7
- Coverage / black spots 8
- Quality of customer service..... 9
- Inconvenient/Difficult to install 10
- Inconvenient/Difficult to manage billing 11
- Inconvenient/Difficult to use 12
- Concerned about impact on health..... 13
- Other (WRITE IN)..... 14
- Not sure 15

Q8b Deleted

SHOW EMAIL AND INSTANT MESSAGING TO ALL. SHOW TEXT MESSAGING IF USE MOBILE (S11 = 2 OR 3)

Q8c Why don't you use email, [text messaging] or instant messaging via an App (such as Facebook Messenger or Whatsapp) more often from your place of work instead of making calls via a fixed line?

DO NOT READ OUT. CODE AS MANY AS APPLY

- Reliability of connection 1
- Not suitable for certain types of conversation 2
- Takes too long to type/ a voice call is quicker..... 3
- No good when you need an immediate response ... 4
- Inconvenient/Difficult to use 5
- Prefer to talk to the other person 6
- Customers need a personal touch 7
- Price of texts 8
- Quality of line / calls 9
- Coverage / black spots 10
- Not appropriate method of contacting clients 11
- Only use texts when undertaking large mailouts ... 12
- Other (WRITE IN)..... 13
- Not sure 14

**ASK ALL - EXCEPT THOSE USING VOIP AS THEIR MAIN OUTGOING VOICE SERVICE
SCRIPTER TO CHANGE 'ONLY CONSIDER CALLING VIA <MAIN FIXED LINE TYPE USED AT S131>' TO
CAPS**

- Q8d Thinking about calls made from your place of work ~~the office~~, what types of numbers or contacts would you **ONLY CONSIDER CALLING VIA** <MAIN FIXED LINE TYPE USED AT S13I> rather than via <mobile phone (IF USE MOBILE AT Q6)> or <VoIP (IF USE VOIP AT Q6)> or <Text (IF USE MOBILE AT Q6)> or email? PROBE: Are there any other numbers?

READ OUT. CODE ALL THAT APPLY

- Local or national landline numbers in the UK 1
- Mobile numbers 2
- International numbers 3
- Non geographical numbers e.g. 0845 or 0870 numbers 4
- DO NOT READ Other (specify) 5
- DO NOT READ Don't know 6
- DO NOT READ None of the above 7

SECTION 5: SSNIP

ASK ALL - EXCEPT THOSE USING VOIP AS THEIR MAIN OUTGOING VOICE SERVICE

- Q10a If the **overall price of your** <insert main fixed line method coded at S13i> **calls** were to increase by 10%, how likely would you be to do each of the following? Only your call charges would be affected - line rental charges would not change.

When answering, please assume that the price of calls offered by other fixed line providers would also increase by 10%, but the prices offered by providers of mobile, VoIP or other forms of communication services would remain the same.

Firstly, how likely would you be to...

READ OUT SCALE. ALWAYS ASK 'A' FIRST, THEN RANDOMISE OTHER STATEMENTS.

CODE ONE ONLY PER STATEMENT

- F. Not change any aspect of your <main fixed line coded at S13i> call behaviour
- G. Switch some calls from <main fixed line coded at S13i> to mobile phone
- H. Switch some calls from <main fixed line coded at S13i> to VoIP
- I. Switch some calls from <main fixed line coded at S13i> to mobile phone texts, instant messaging via an app or emails
- J. Give up my <main fixed line coded at S13i> and only rely on mobile and broadband call services

	A	B	C	D	E
Certain to	1	1	1	1	1
Very likely	2	2	2	2	2
Fairly likely	3	3	3	3	3
Fairly unlikely	4	4	4	4	4
Very unlikely	5	5	5	5	5
Certain not to	6	6	6	6	6
Don't know / not applicable (DO NOT READ OUT)	7	7	7	7	7

ASK ALL - EXCEPT THOSE USING VOIP AS THEIR MAIN OUTGOING VOICE SERVICE

Q10b If the **overall price of your <insert main fixed line method coded at S13i> bill** including line rental and calls increased by 10%, how likely would you be to do each of the following?

When answering, please assume that a similar price increase was made by all other fixed line providers, but not providers of mobile, VoIP or other forms of calling/ communication.

Firstly, how likely would you be to...

READ OUT SCALE. ALWAYS ASK 'A' FIRST, THEN RANDOMISE OTHER STATEMENTS.

CODE ONE ONLY PER STATEMENT

- A. Not change any aspect of your <main fixed line coded at S13i> call behaviour
- B. Switch some calls from <main fixed line coded at S13i> to mobile phone
- C. Switch some calls from <main fixed line coded at S13i> to VoIP
- D. Switch some calls from <main fixed line coded at S13i> to mobile phone texts, instant messaging via an app or emails
- E. Give up my <main fixed line coded at S13i> and only rely on mobile and broadband call services

	A	B	C	D	E
Certain to	1	1	1	1	1
Very likely	2	2	2	2	2
Fairly likely	3	3	3	3	3
Fairly unlikely	4	4	4	4	4
Very unlikely	5	5	5	5	5
Certain not to	6	6	6	6	6
Don't know / not applicable (DO NOT READ OUT)	7	7	7	7	7

REPEAT Q11 TO Q14a/b FOR BOTH Q10a AND THEN Q10b

ASK Q11 IF CODES 1 OR 2 OR 3 CODED AT Q10a (B OR C OR D)

Q11 You said you would be likely to switch some calls from <main fixed line coded at S13i>, which of the following services would you switch **most** of these outgoing calls to?

READ OUT. SINGLE CODE

Mobile voice calls 1
 VoIP 2
 Email 3
 Mobile phone texts or instant messaging via an app 4
 Other (specify) 5
DO NOT READ OUT Don't know 6

ASK Q13 IF CODES 1 OR 2 OR 3 CODED AT Q10a (E)

Q13 If you cancelled your <main fixed line method coded at S13i>, which of the following services would you use for **most** of your outgoing calls?

READ OUT. SINGLE CODE

Mobile voice calls	1
VoIP	2
Email	3
Mobile phone texts or instant messaging via an app	4
Other	5
DO NOT READ OUT Don't know	6

ASK Q14a/b IF WOULD DO NOTHING Q10a/b (A)=1 OR 2 OR 3

Q14a Why would you be unlikely to consider taking any action?

DO NOT READ OUT. CODE ALL THAT APPLY

Too much hassle to switch	1
No time to research alternatives	2
Current supplier provides reliable call / line / connection quality	3
Current supplier provides good customer service.....	4
Good relationship with current supplier	5
Loyal customer / been with them many years	6
Alternatives would not meet my needs.....	7
Alternatives are too expensive	8
Don't trust alternatives.....	9
Locked into long term contract	10
Not that important	11
Want / need access to the internet / broadband.....	12
10% not a large amount/is a small amount	13
Have landline as part of bundled package and don't want to switch other services (internet, Pay TV etc)	14
Don't use that much	15
Not much difference between suppliers.....	16
Other WRITE IN.....	17
(Don't know).....	18

Q14b By what percentage would the price you pay for <'calls' when asked after Q10a 'line rental and calls' when asked after Q10b> < from your <INSERT main fixed line coded at s13i> have to increase (assuming the prices of other communication services do not increase) for you to change the number of calls you make from fixed lines or use alternative means of calling (e.g. VoIP or calls from mobiles)?

PROBE FOR BEST ESTIMATE IF UNSURE. MUST BE 11% OR HIGHER

Write in percentage _____%

CLASSIFICATION

ASK ALL

C1 Which of the following bands best describes your organisation's turnover for the last financial year?

READ OUT. CODE ONE ONLY.

INTERVIEWER INSTRUCTION: START AT AN APPROPRIATE PLACE ON THE SCALE GIVEN THE SIZE OF THE ORGANISATION YOU ARE SPEAKING TO

Under £50K	1
£50 to less than 75K	2
£75k to less than £100k.....	3
£100k to less than £250k	4
£250k to less than £500k	5
£500k to less than £1m	6
£1m to less than £3.....	7
£3m to less than £5m	8
£5m to less than £10m.....	9
£10m to less than £25m	10
£25m+.....	11
Don't know / refused	12

THANK YOU FOR YOUR TIME

1.4. Business Consumers (SME) - Survey 2

SECTION 1: SCREENER

INTRODUCTION:

Good morning/afternoon, my name is _____ from Jigsaw Research and I am calling on behalf of Ofcom, the regulator for the communications industries in the UK. Ofcom currently needs to understand how businesses make decisions about what service to use when they want to make phone calls from work.

Could I speak to someone who has responsibility, either solely or jointly, for making decisions about the telecommunications devices and applications used in this organisation? ADD IF NECESSARY this could be the owner/manager, MD, Financial director, office manager or IT /Telecoms manager.

YES, CONTINUE WITH SCREENER. IF REFUSED, THANK AND CLOSE

IF NECESSARY ADD:

- Your views are incredibly important in helping Ofcom to understand the challenges that businesses face when making decisions about communications services and the sort of advice, information or support that might make this easier.
- It should take around 20 minutes of your time, depending upon your answers.
- We would like to reassure you that this is a genuine piece of market research. No-one will try to sell you anything as a direct result of this research and the project is not designed to test your knowledge but to gauge your opinions and understand how you make decisions.
- We got your organisation name and telephone number from a standard list provider Sample Answers, a commercial database of businesses in the UK. We are interested in speaking to people responsible for IT and telecoms across a wide range of businesses.
- If you would like to check our credentials, you can call the Market Research Society, free of charge, on 0500 39 69 99.
- If you would like to verify that is a legitimate piece of research commissioned by Ofcom we can also email or fax you a letter that Ofcom have written for this purpose.
- The research is being conducted under the Code of Practice of the Market Research Society, which means that all of the answers you give are strictly confidential and anonymous. Participation in this survey is voluntary.

ONCE THROUGH TO CONTACT RESPONSIBLE REPEAT INTRO THEN ASK:

S1 Would it be convenient to go through the survey now? **SINGLE CODE**

Yes - now	1	CONTINUE
No - but willing to take part later	2	SCHEDULE APPT
No.....	3	SEEK REFERRAL S2

S2 Is there anyone else within your organisation that I could speak to about this?

Yes - now	1	CONTINUE
Yes - later	2	SCHEDULE APPT
No.....	3	CLOSE - SEEK REFERRAL

S3a Which of the following best describes your *personal* involvement with purchasing decisions regarding your organisation's telecoms and other communications services. Are you (READ OUT)? **SINGLE CODE**

Solely responsible.....	1	CONTINUE
Jointly responsible with somebody else	2	CONTINUE
Or is someone else primarily responsible	3	ASK TO BE REFERRED & GO BACK TO INTRODUCTION

S3b Can I just double check that can you comment in detail on your organisation's experiences using communications suppliers and services? **SINGLE CODE**

Yes.....	CONTINUE
No.....	ASK TO BE REFERRED AND GO BACK TO INTRODUCTION

ONCE THROUGH TO RIGHT PERSON:

S4 Could I please confirm your exact job title? **SINGLE CODE**

Owner / Proprietor	1
Partner / Managing Partner	2
Chief Executive Officer	3
Chief Finance Director / Finance Director	4
Chief Operations Director / Operations Director ...	5
Managing Director	6
IT / Telecoms Director / Manager / Other ITC specialist	7
Other senior manager / director.....	8
PA / Office manager	9
Other (WRITE IN).....	10
Refused	11

S5 RECORD FROM SAMPLE

INDUSTRY SECTOR

Primary	1
Manufacturing	2
Construction	3
Wholesale/Transport/Communications	4
Retail	5
Financial Services	6
Other services	7
Public admin and services	8
Other	9

MONITORING QUOTA

S6a Including yourself, how many people does your organisation currently employ in the UK either full or part time? **WRITE IN NUMBER - DO NOT ALLOW ZERO.**

IF DON'T KNOW, READ OUT LIST AND SINGLE CODE ACCORDINGLY

1	1
2-4	2
5-9	3
10-49	4
50-249	5
250+	CLOSE
Don't know	CLOSE
Refused	CLOSE

MONITORING QUOTA

ASK ALL

S6b Which of the following best describes the way you work?

READ OUT. CODE ONE ONLY

I run my business from home (IF S6=1)	1
I mainly work from home	2
I occasionally work from home but mainly work elsewhere	3
I never work from home	4

READ OUT IF HOME OFFICE (S6=1 AND S6b = 1)

For the rest of the interview, we would like you to focus just on your work related communications from your home office, not your personal communications.

S7 How long has your organisation been trading? **SINGLE CODE**

- Not yet actively trading 1 **CLOSE**
 Less than 2 years 2
 2-5 years 3
 6-9 years 4
 10-19 years..... 5
 20+ years 6
 Don't know..... 7
 Refused 8
 Not applicable 9

S8 How many sites or offices does your organisation operate from in the UK? **SINGLE CODE. RECORD WHOLE NUMBER. ALLOW UP TO SIX NUMBERS HERE.**

--	--	--	--	--	--

Don't know X
 Refused Y

ASK IF MORE THAN 1 SITE AT S8

S8a Does your involvement with purchasing decisions regarding your organisation's telecoms and other communications services extend to all sites, some sites or just the site you operate out of?

- All sites 1
 Some sites..... 2
 Just the site operating from 3

READ OUT IF MORE THAN 1 SITE AT S8

For the rest of the interview, where relevant we would like you to focus on <IF S8A=1 INSERT: all / IF S8A=2 OR 3 INSERT: just> the sites you have knowledge of.

S9a and S10a RECORD REGION AND POSTCODE FROM SAMPLE

S9b In which of these regions are you personally based for work? **READ OUT. SINGLE CODE**

- North East England 1
 North West England 2
 Yorkshire and the Humber 3
 East Midlands 4
 West Midlands 5
 East England 6
 London 7
 South East England 8
 South West England 9

**MONITORING
QUOTA**

Wales	10
Scotland	11
Northern Ireland	12

S10b RECORD POSTCODE

ASK ALL

S10c Before we ask you about the communication services that you and your organization use, please look at the different statements people have made about technology services such as mobile phones, landline phones, broadband or TV services.

For each statement please indicate how much you agree or disagree...

I try to keep up with technology

My friends or colleagues tend to come to me if they have questions about technology

I'm as knowledgeable about these technologies as the next person

Agree strongly	1
Agree slightly	2
Neither agree nor disagree	3
Disagree slightly	4
Disagree strongly	5
Don't know.....	6

ASK ALL

S11 Has your organisation used any of the following communications services in the last month?
READ OUT EACH SERVICE.

NOTE FOR INTERVIEWERS: WE WANT RESPONDENTS TO ANSWER BASED ON THE TOTAL ORGANISATION WHEREVER POSSIBLE. INCLUDING ANY HOME WORKERS.

SERVICES:

Standard landlines.....	1
IF NECESSARY: <i>We are referring to analogue telephone lines (fixed telephone lines that are not ISDN lines)</i>	
Smartphones (e.g. Apple iPhone, Samsung Galaxy, BlackBerry, etc.)	2
Standard mobile phones	3
ADSL Broadband - e.g. a standard copper line with a maximum speed of up to 30MB	4
Fibre Broadband - e.g. a fibre optic line with a maximum speed of 30MB or more.....	5
Cable Broadband - e.g. broadband that is provided by Virgin Media	6
Mobile broadband through a USB Modem or 'dongle'	7

ISDN 2/2e	8
<i>IF NECESSARY: This is a form of ISDN line offering you connection for up to 8 digital devices and allowing you to make two calls at the same time</i>	
ISDN 30	9
<i>IF NECESSARY: This is a form of ISDN line offering you 8 to 30 independent connections and allowing you to multiple calls at the same time</i>	
Leased lines or private circuits, including Ethernet leased line services ⁶	10
Voice over Internet Protocol or VoIP	11
<i>IF NECESSARY: VoIP includes services that carry voice traffic over the internet, such as Skype and Vonage, and voice over IP services that a provider of communications services may offer, sometimes called IP Voice or SIP trunking services.</i>	
Video conferencing	12
Social media marketing e.g. through Facebook, LinkedIn or Twitter	13
Cloud based services	14
<i>IF NECESSARY: Cloud services are available to users via the Internet from a cloud computing provider's servers as opposed to being provided from a company's own on-premises servers. Popular examples of cloud services include Google Drive, One Drive and Dropbox.</i>	
DON'T READ OUT None of these	16

ASK IF HAVE NOT CODED 1 OR 4-6 OR 8-11 ABOVE

S12 Am I right in thinking that your organisation does not have any fixed line communications services?

CODE ONE ONLY

We don't	1	CLOSE
We do	2	GO BACK TO S11

ASK ALL WHO DO NOT USE EACH SERVICE

S11b Are you planning to get or use any of the following services for your business in the next 12 months?

READ OUT EACH SERVICE NOT SELECTED AT S11

ASK ALL WHO DO NOT USE OR PLAN TO USE EACH SERVICE

S11ci Which, if any, services have you considered getting **but didn't get** for your business in the past 2 years?

READ OUT EACH SERVICE NOT SELECTED AT S11 OR S11B

⁶ This is a bit different to other lines. The leased line does not offer a calls services. It may be an input used to provide access but the actual access service would be a traditional line or, more likely, an ISDN services (probably ISDN30). Alternatively, there could be an Ethernet leased line with VoIP running over it.

REPEAT S11cii AND S11ciii TOGETHER FOR EACH SERVICE SELECTED AT S11Ci

S11cii And why didn't you get <SERVICE>?

DO NOT READ OUT (NB: WE WILL ADD TO THIS LIST DURING FIELDWORK)

- Not relevant or needed by the business 1
- Too expensive 2
- Not enough information available on the service... 3
- Lack of time to install the service 4
- Too complicated 5
- Chose an alternative method instead 6
- Other (specify) 7
- Don't know 8

ASK IF CODE 1 AT S11cii

S11ciii Did you feel that you had enough information about <SERVICE> to make a decision as to whether to use it?

- Yes..... 1
- No..... 2

ASK ALL

S11d Which, if any, services do you feel you would benefit from being given more information about in terms of how it works and how it could benefit your business?

READ OUT ALL SERVICES CODED AT S11

**IF NOT CODED AT S11 THEN ONLY SHOW SERVICES THAT
HAVE NOT CODED 1 OR 3 AT S11cii**

**SHOW ON SEPARATE SCREEN IF SELECTED CODES 4-6 AT S11
ADJUST CODE LABELS AS BELOW.**

Code 4 - ADSL

Code 5 - Fibre

Code 6 - Cable

For the following questions, when we ask about your Fixed line broadband we will mean the <INSERT BROADBAND TYPE> broadband connection your organisation has used in the last month.

ASK SEPARATELY FOR EACH OF STANDARD LANDLINES (S11=1); ISDN 2/2E (S11 = 8); ISDN 30 (S11 = 9); LEASED LINES OR PRIVATE CIRCUITS (S11 = 10), IF USED

ASK SEPARATELY FOR EACH (IF CODED AT S11)

S13 What have you used < CODED AT S11> for, in the last month? Would it be ...
READ OUT. CODE ALL THAT APPLY

Outgoing voice calls 1
 Internet..... 2
 VoIP, including video calls (IF S11 = 11) 3
 Other videoconferencing services⁷ (IF S11 = 12) 4
 Social media marketing e.g. through Facebook, LinkedIn or Twitter (IF S11 = 13) 5
 Cloud based services (IF S11 = 14)..... 6
 Taking payments online 7
 Enabling home working 8
 Data sharing 9

	READ OUT IF USE ...	Outgoing voice calls	Internet	VoIP, including video calls	Other video conferencing
A	Standard landlines (S11=1)	1	NA	NA	NA
B	ISDN 2/2e (S11=8)	1	2	3	4
C	ISDN 30 (S11=9)	1	2	3	4
D	Leased lines or private circuits (S11=10)	NA	2	3	4
E	Fixed line broadband (S11=4-6)	NA	2	3	4

NOTE TO OFCOM: WE'VE INCLUDED AN 'INCOMING CALLS' CATEGORY TO HELP THE FLOW OF THE INTERVIEW

IF CODE 1 AT S13D THEN READ OUT: You said you make outgoing voice calls over leased lines or private circuits? Can I check if this is correct or do you mean VoIP? **RECODE S13 IF NECESSARY**
CLOSE IF DON'T USE ANY OF STANDARD LANDLINE, ISDN 2/2e, ISDN 30 or leased LINES/PRIVATE CIRCUITS FOR OUTGOING CALLS OR IF DON'T USE VoIP⁸ (CODE 3 IN ROWS B - E AT S13)

ASK IF OUTGOING CALLS MADE ON MORE THAN 1 TYPE OF FIXED LINE AT S13. IF OUTGOING CALLS MADE ON ONLY 1 TYPE OF FIXED LINE THEN AUTOPUNCH THIS LINE TYPE AT S13i

S13i. From which of your fixed lines were most outgoing voice calls made during the last month?
READ OUT. SINGLE CODE

⁷ Videoconferencing can use either IP or traditional voice lines, particularly ISDN

⁸Comment SP: I don't think we should close it if they only use VoIP (i.e. don't code 2 but have some 5s) I think it is useful to carry on to understand why they don't use traditional voice anymore.

This could be very useful in understanding the potential constraints on traditional voice and to understand the popularity of managed versus un-managed VoIP.

INTERVIEWER: RESPONDENT MUST ANSWER TO QUALIFY. IF DON'T KNOW, ASK FOR BEST ESTIMATE. IF SPLIT EVENLY BETWEEN MORE THAN ONE LINE, ASK WHICH THEY CONSIDER TO BE THE MAIN LINE.

Standard landline(s) (S13A = 1) 1
 ISDN 2/2E line(s) (S13B = 1)..... 2
 ISDN 30 line(s) (S13C = 1) 3
 Leased Line(s) / Private Circuit(s) (S13D = 3) 4
 Fixed line broadband (S13E=3) 5

IF CODED 9 AT S11

S13b Is your VoIP service provided by...
READ OUT. SINGLE CODE

The service provider that also provides your <insert all fixed line methods coded 1 at S13a-e> connection⁹ 1
 A different service provider to the one that provides your <insert all fixed line methods coded 1 at S13a-e> connection¹⁰ 2
 Both 3
 Neither 4
 (Don't Know) 5

IF CODED 9 AT S11

S13c Which of the following have you used VoIP for in the last month?
READ OUT. CODE ALL THAT APPLY

Internal or inter-site voice calls 1
 Voice calls external to the business 2
 Both 3
 Neither 4
 (Don't know)..... 5

⁹ Managed

¹⁰ Unmanaged

SECTION 2: PRODUCTS USED

READ OUT

We are now going to talk about the companies that provide your communications services.

FOR ALL LINE TYPES (A,B,C,D,E) CODED 1 (CALLS) OR 3 (VoIP) AT S13

Q1 What is the name of the company or companies that you pay for your <coded at S13>?
DO NOT READ OUT. MULTICODE

IF MORE THAN 1 COMPANY IS CODED FOR A SERVICE AT Q1 THEN ASK Q1ai

Q1ai And which company is the main provider of your [insert text below where respondent has more than one provider]?

SINGLE CODE

- a) Standard landline calls
- b) Standard landline rental
- c) ISDN 2/2e line calls
- d) ISDN 2/2e line rental
- e) ISDN 30 line calls
- f) ISDN 30 line rental
- g) Fixed line broadband
- h) VoIP calls made over your fixed line broadband
- i) Calls made over your leased line/ private circuit connection
- j) Leased line/ private circuit line rental

SUPPLIER LIST TO BE MONITORED/ADDED TO DURING FIELD

	1a	1b	1c	1d	1e	1f	1g	1h	1i	1j
Alcatel										
Alternative Networks										
BT										
Carphone Warehouse										
Chess										
Colt										
Claranet										
Daisy										
Demon										
DST (Directsave.com)										
Eclipse										

Everything Everywhere/EE										
Excel										
Gamma										
Global Crossing										
Homecall										
Intechnology										
KCom (Kingston Communications)										
Janet										
One Bill										
Orange										
O2 / BE										
Madasafish										
Pipex										
Plusnet										
Post Office										
Primus										
Sky / Skytalk										
Skype										
Southern										
South West										
Spacotel										
Spitfire										
Supanet										
Superline										
Swiftcall										
Talk Talk										
Tesco Telecom										
Titan										
thePhoneCoop										
T-mobile										
Tooway										
Toucan										

ASK Q4a FOR MAIN OUTGOING CALL FIXED LINE TYPE CODED AT S13i
ASK Q4a FOR EACH SUPPLIER CODED AT Q1a OR Q1c OR Q1e or Q1h or Q1i (DEPENDING ON MAIN
FIXED LINE TYPE CODED AT S13i)

Good/better deal overall	1
Price of overall calls package	2
Price of calls to mobile phones	3
Price of international calls.....	4
Quality of line / calls	5
Paid for as part of a bundled package	6
Provided free as part of bundled package	7
Unlimited weekend calls to UK landlines.....	8
Unlimited evening and weekend calls to UK landlines.....	9
Unlimited anytime calls to UK landlines.....	10
Offer internet calling / VoIP.....	11

Quality of customer service/ account management	12
Offer a range of services to businesses	13
Well-known and trusted brand	14
No reason to change	15
Too much hassle to change	16
Historical reasons/ always used them	17
Friends and family use them.....	18
Other suppliers are more expensive.....	19
Other suppliers have worse line / call quality	20
Other suppliers have worse customer service	21
Not aware of other suppliers	22
Wasn't around when original decision was made	23
Reliable service	24
Other (WRITE IN).....	25
None of the above	26

ASK Q4b FOR MAIN OUTGOING CALL FIXED LINE TYPE CODED AT S13i

ASK ALL WITH MAIN LINE OVER WHICH YOU MAKE CALLS AND FIXED LINE BROADBAND FROM DIFFERENT SUPPLIERS AT Q1ai/a vs g OR Q1ai/c or Q1ai/e vs. g

Q4b Thinking about your <INSERT MAIN FIXED LINE METHOD FROM S13i>, why do you use a different supplier for your fixed line broadband, rather than use your fixed voice calls supplier for broadband as well?

DO NOT READ OUT. CODE ALL THAT APPLY

Can't get broadband from voice call supplier	1
Didn't know I could switch my broadband to the same supplier	2
Capacity/speed issues	3
Price of fixed broadband	4
Price of overall calls package	5
Good/better deal overall	6
Quality of line / calls	7
Offer internet calling / VoIP	8
Quality of customer service from current broadband supplier	9
Well-known and trusted supplier for broadband	10
Always used them for broadband	11
Other (WRITE IN).....	12
None of the above	13

ASK Q4c FOR MAIN OUTGOING CALL FIXED LINE TYPE CODED AT S13i

ASK ALL WITH MAIN OUTGOING CALL LINE RENTAL AND CALLS FROM THE SAME SUPPLIERS AT Q1a/Q1b OR Q1c/Q1d OR Q1e/Q1f or Q1g/Q1h or Q1i/Q1j

Q4c Thinking about your <INSERT MAIN FIXED LINE METHOD FROM S13i>, why do you use the same supplier for your fixed voice calls and your line rental?

DO NOT READ OUT. CODE ALL THAT APPLY

- Good/better deal overall 1
- Quality of line/calls 2
- Calls are provided free as part of a bundled package 3
- Calls and line rental are provided free as part of a bundled package 4
- Quality of customer service/account management 5
- Well-known and trusted brand 6
- No reason to change 7
- Too much hassle to change 8
- Historical reasons/always used them 9
- Other suppliers are more expensive..... 10
- Other supplies have worse line/call quality 11
- Other suppliers have worse customer service 12
- Not aware of other suppliers 13
- Wasn't around when original decision was made ... 14
- Other (WRITE IN)..... 15
- None of the above 16

ASK Q4d FOR MAIN OUTGOING CALL FIXED LINE TYPE CODED AT S13i

ASK ALL WITH MAIN OUTGOING CALL LINE RENTAL AND CALLS FROM DIFFERENT SUPPLIERS AT Q1a/Q1b OR Q1c/Q1d OR Q1e/Q1f or Q1g/Q1h or Q1i/Q1j

Q4d Thinking about your <INSERT MAIN FIXED LINE METHOD FROM S13i>, why do you use a different supplier for your fixed voice calls, rather than use your line rental supplier for fixed voice calls as well?

DO NOT READ OUT. CODE ALL THAT APPLY

- Good/better deal overall 1
- Quality of line/calls 2
- Calls are provided free as part of a bundled package 3
- Quality of customer service/account management 4
- Well-known and trusted brand 5
- No reason to change 6
- Too much hassle to change 7
- Historical reasons/always used them 8
- Other suppliers are more expensive..... 9
- Other supplies have worse line/call quality 10
- Other suppliers have worse customer service 11
- Not aware of other suppliers 12
- Wasn't around when original decision was made ... 13
- Other (WRITE IN)..... 14
- None of the above 15

ASK Q4e FOR MAIN OUTGOING CALL FIXED LINE TYPE CODED AT S13i

Q4e Which of the following best describes how you think about your <INSERT MAIN FIXED LINE METHOD FROM S13i> costs?
READ OUT. SINGLE CODE

- I think about the costs for line rental and calls separately 1
- I think about the costs for line rental and calls together 2

ASK Q4f FOR MAIN OUTGOING CALL FIXED LINE TYPE CODED AT S13i - UNLESS IT IS VOIP (DO NOT ASK FOR VOIP)

Q4f To what extent do you agree or disagree with the following statement. Under certain circumstances I would be prepared to give up the ability to make calls from my <INSERT MAIN FIXED LINE METHOD FROM S13i>?
READ OUT. SINGLE CODE

- Agree strongly 1
- Agree slightly 2
- Neither agree nor disagree 3
- Disagree slightly 4
- Disagree strongly 5
- Don't know 6

ASK Q4g FOR MAIN OUTGOING CALL FIXED LINE TYPE CODED AT S13i
ASK ALL ANSWERING CODES 1 OR 2 AT Q4F

Q4g Why would you be prepared to give up the ability to make calls from your <INSERT MAIN FIXED LINE METHOD FROM S13i> in the future?
DO NOT READ OUT. CODE ALL THAT APPLY

- Only need it for internet 1
- Price of making calls from <insert main fixed line method> is too high 2
- I don't place a high value on making calls from my <insert main fixed line method> 3
- Reliability of connection 4
- Quality of line/calls 5
- Quality of customer service..... 6
- Inconvenient/easier to use mobiles 7
- Inconvenient/easier to use VoIP 8
- Other (please specify) 9

ASK Q4h FOR MAIN OUTGOING CALL FIXED LINE TYPE CODED AT S13i

ASK ALL ANSWERING CODES 3, 4 OR 5 AT Q4F

Q4h Why would you not be prepared to give up the ability to make calls from your <INSERT MAIN FIXED LINE METHOD FROM S13i> in the future?

DO NOT READ OUT. CODE ALL THAT APPLY

- Already use this line for internet 1
- Price of making calls from <insert main fixed line method> is low/good value 2
- I prefer to make calls from my <insert main fixed line method> 3
- Reliability of connection 4
- Quality of line/calls 5
- Quality of customer service..... 6
- Don't have/use mobile(s) 7
- Less convenient/less easy to use mobiles 8
- Don't have/use VoIP 9
- Less convenient/less easy to use VoIP 10
- No reason to change 11
- Too much hassle to change 12
- Historical reasons/always used for business calls... 13
- Already have equipment/hardware for these calls. 14
- Other (please specify) 15

SECTION 3: INDEPENDENT ADVICE QUESTIONS

11. Thinking now more generally about the help and advice you may seek in relation to your communication goods and services.

To what extent do you agree or disagree with the following statements.

READ OUT STATEMENTS THEN SCORE. RANDOMISE ORDER OF STATEMENTS.

- a. I am confident at identifying communication goods and services that would benefit my business;
- b. I know where to go to get information to help inform my understanding of communication goods and services;
- c. I know where to go to get help and advice on my business' communication needs;
- d. There is sufficient independent advice to help me understand my business needs

- Agree strongly 1
- Agree slightly 2
- Neither agree nor disagree 3
- Disagree slightly 4
- Disagree strongly 5
- Don't know 6

- I2. Where do you currently go to seek help and advice on communications services and suppliers?
DO NOT READ OUT. CODE ALL THAT APPLY

Communications providers (websites / newsletters / emails).....	1
Friends and colleagues.....	2
Mainstream media / press	3
Price comparison websites	4
Independent brokers	5
Independent review or advice websites	6
Specialist industry magazines	7
Third party websites	8
Trade bodies e.g. Federation of Small Business.....	9
Government information / websites	10
Search Engine e.g. Google	11
Other websites (type in)	12
Other (type in)	13
I do not seek/have not sought advice.....	14

FOR EACH CODE SELECTED AT I2 (CODES 4,5,7,8,9,10,13)

WORDING CHANGES

1. Which **PRICE COMPARISON WEBSITES** do you visit for help and advice on communications services? (I2=4)
2. Which **INDEPENDENT BROKERS** do you talk to for help and advice on communications services? (I2=5)
3. Which **SPECIALIST INDUSTRY MAGAZINES** do you look at for help and advice on communications services? (I2=7)
4. Which **THIRD PARTY WEBSITES** do you visit for help and advice on communications services? (I2=8)
5. Which **TRADE BODIES** do you visit or talk to for help and advice on communications services? (I2=9)
6. Which **GOVERNMENT INFORMATION / WEBSITES** do you visit or talk to for help and advice on communications services? (I2=10)
7. Which **SEARCH ENGINE** do you visit for help and advice on communications services? (I2=11)

- I2b. Which **<SUPPLIER>** do you visit or talk to for help and advice on communications services?

TYPE IN

Can't remember/don't know 1

- I3a. Are there specific areas at the moment where you consider that help and advice on communication services would be beneficial to your business?

DO NOT READ OUT. SINGLE CODE

Yes..... 1
 No..... 2
 Don't know 3

CODE 1 AT I3a

- I3b. In what areas would you consider seeking help or advice?

DO NOT READ OUT. TYPE IN. PROBE FULLY

Don't know 2

14. Has anything prevented you **seeking** advice in the past?

SINGLE CODE

Yes..... 1
No..... 2
Don't know..... 3

IF YES CODE 1 AT I4.

15. What's prevented you from seeking advice?

READ OUT. CODE ALL THAT APPLY

Lack of time to seek advice (i.e. issue is not important enough given other needs of the business) 1
I didn't know where to go for advice 2
I don't trust that external advice is unbiased and independent ... 3
It would cost too much money to get proper advice on the issue . 4
I would rather find a solution by myself 5
Other (please type in) 6

ALL NOT CODING 14 at I2 (HAVE SOUGHT ADVICE).

16. Has anything prevented you from **acting** on advice in the past?

SINGLE CODE

Yes..... 1
No..... 2
Don't know..... 3

IF YES (CODE 1) AT I6.

17. What's prevented you from acting on the advice given?

READ OUT. CODE ALL THAT APPLY (NB: WE WILL ADD TO THIS LIST DURING FIELDWORK)

I don't trust that external advice is unbiased and independent 1
The advice wasn't tailored to my business 2
I received advice from a number of sources but it was too confusing to work out what was best for my business 3
Other (please type in) 4

IF CODE 1-4 AT I7.

18. You said that "<ANSWER FROM I7>". On this occasion who did you receive your advice from?

REPEAT FOR EACH OPTION SELECTED AT I7

Can't remember/ Don't know 1

CLASSIFICATION

ASK ALL

C1 Which of the following bands best describes your organisation's turnover for the last financial year?

READ OUT. CODE ONE ONLY.

INTERVIEWER INSTRUCTION: START AT AN APPROPRIATE PLACE ON THE SCALE GIVEN THE SIZE OF THE ORGANISATION YOU ARE SPEAKING TO

Under £50K	1
£50 to less than 75K	2
£75k to less than £100k.....	3
£100k to less than £250k	4
£250k to less than £500k	5
£500k to less than £1m	6
£1m to less than £3.....	7
£3m to less than £5m	8
£5m to less than £10m.....	9
£10m to less than £25m	10
£25m+.....	11
Don't know / refused	12

ASK ALL

C2 Thank you for your time and for completing this survey. Would you be happy to be recontacted in the future?

READ OUT. MULTICODE

Yes- by phone	1
Yes- by email (specify)	1
DON'T READ OUT No	2
DON'T READ OUT Don't know	3

THANK YOU FOR YOUR TIME

1.5. Business users of ISDN and IP alternatives

SECTION 1: SCREENER

INTRODUCTION:

Thank you for agreeing to participate in this research. Assuming your business meets the Ofcom criteria for inclusion, the survey should take around 20 minutes to complete.

Please take a moment to maximize this window for optimal performance.

We'd like you to complete all of the questions appearing on each page. Always scroll down to make sure you've answered all of the questions provided.

To move from one page to another, use the "NEXT" and "PREVIOUS" buttons found at the bottom of each page. Please DO NOT use your browser buttons while completing this survey.

Please click the "Next" to begin this survey.

The first set of questions are for classification purposes and will help us properly analyse the results of the survey.

- S3a Which of the following best describes your *personal* involvement with purchasing decisions regarding your organisation's telecoms and other communications services at some or all of the sites that your business has. Are you (READ OUT)?

SINGLE CODE

- | | | |
|--|---|----------|
| Solely responsible..... | 1 | CONTINUE |
| Jointly responsible with somebody else | 2 | CONTINUE |
| Or is someone else primarily responsible | 3 | CLOSE |

- S4 Which of the following best describes your exact job title?

SINGLE CODE

- | | |
|---|----|
| Owner / Proprietor | 1 |
| Partner / Managing Partner | 2 |
| Chief Executive Officer | 3 |
| Chief Finance Director / Finance Director | 4 |
| Chief Operations Director / Operations Director ... | 5 |
| Managing Director | 6 |
| IT / Telecoms Director / Manager / Other ITC specialist | 7 |
| Other senior manager / director | 8 |
| PA / Office manager | 9 |
| Other (WRITE IN)..... | 10 |

S5 INDUSTRY SECTOR - RECORD FROM PANEL DATA

Primary	1
Manufacturing	2
Construction	3
Wholesale/Transport/Communications	4
Retail	5
Financial Services	6
Other services	7
Public admin and services	8
Other	9

MONITORING QUOTA

S6a Including yourself, how many people does your organisation currently employ in the UK either full or part time?

SINGLE CODE

1	1
2-4	2
5-9	3
10-19	4
20-49	5
50-249	6
250+	7
Don't know	CLOSE
Rather not say	CLOSE

MONITORING QUOTA

ASK ALL

S6b Thinking about your company's current telecoms provisions, which of the following types of business communication service does your company have?

MULTICODE

Analogue telephone line(s) i.e. fixed telephone lines that are not ISDN lines	1
Mobile phones (including Smartphones)	2
Cable modem or ADSL	3
ISDN 2/2e channels or Business Highway	4
ISDN 30 channels	5
IP based alternatives to ISDN (e.g. SIP trunks, hosted VOIP)	6
SDSL	7
Leased lines	8
Virtual Private Networks	9
Ethernet	10
Other business communications services	11
None of these	12 CLOSE
Don't know	13 CLOSE

QUOTA ON USERS OF ISDN 2/2e, ISDN 30 AND IP BASED ALTERNATIVES

ASK IF DO NOT CURRENTLY USE ISDN2/2E OR ISDN30 AT S6B

S6c Have you used the following business communication services in the last 3 years?

SHOW ALL COMMUNICATION SERVICES NOT USED AT S6B

- Analogue telephone line(s) i.e. fixed telephone lines that are not ISDN lines 1
- Mobile phones (including Smartphones) 2
- Cable modem or ADSL 3
- ISDN 2/2e channels or Business Highway 4
- ISDN 30 channels 5
- IP based alternatives to ISDN (e.g. SIP trunks, hosted VOIP) 6
- SDSL 7
- Leased lines 8
- Virtual Private Networks 9
- Ethernet 10
- Other business communications services 11
- None of these 12 **CLOSE**
- Don't know 13 **CLOSE**

QUOTA ON
USERS OF
ISDN 2/2e, ISDN
30 AND IP
BASED
ALTERNATIVES

QUOTAS: WE ARE AIMING TO ACHIEVE:

- 1) 100 x ISDN2/2E INTERVIEWS (S6b = 4)
- 2) 100 x ISDN30 INTERVIEWS (S6b = 5)
- 3) 100 x IP BASED (S6b = 6) THAT HAVE...
 - a. SWITCHED FROM ISDN2/2e OR ISDN30 IN THE LAST 3 YEARS (S6c = 4 or 5)*
 - b. OR NOT SWITCHED FROM ISDN2/2e OR ISDN30 IN THE LAST 3 YEARS (S6c = not 4 or 5)

*NB: THE PRIORITY IS TO TARGET AS MANY SWITCHERS AS POSSIBLE IN THE FIRST INSTANCE

S7 How long has your organisation been trading? **SINGLE CODE**

- Not yet actively trading 1 **CLOSE**
- Less than 2 years 2
- 2-5 years 3
- 6-9 years 4
- 10-19 years 5
- 20+ years 6
- Don't know 7

S8 How many sites or offices does your organisation operate from in the UK?

RECORD WHOLE NUMBER. ALLOW UP TO SIX NUMBERS HERE.

--	--	--	--	--	--

Don't know X

Rather not say Y

ASK IF MORE THAN 1 SITE AT S8

S8a Does your involvement with purchasing decisions regarding your organisation's telecoms and other communications services extend to all sites, some sites or just the site you operate out of?

- All sites 1
- Some sites..... 2
- Just the site operating from 3

IF MORE THAN 1 SITE AT S8

For the rest of the interview, where relevant we would like you to focus on <IF S8A=1

INSERT: all / IF S8A=2 OR 3 INSERT: just> the sites you have knowledge of.

S9 In which of these regions are you personally based for work?

SINGLE CODE

- North East England 1
- North West England 2
- Yorkshire and the Humber 3
- East Midlands 4
- West Midlands 5
- East England 6
- London 7
- South East England 8
- South West England 9
- Wales 10
- Scotland 11
- Northern Ireland 12

MONITORING QUOTA

S10 To the best of your knowledge what would you say is the annual **UK** turnover for your company? *Please do not include turnover from overseas.*

SINGLE CODE.

- Less than £250,000 1
- £250,000 - £499,999 2
- £500,000 - £999,999 3
- £1 million - £2.5 million 4
- £2.5 million - £20 million 5
- £21 million - £50 million 6
- £51 million - £100 million 7
- £101 million - £500 million 8
- Over £500 million 9
- Don't know 10

S11 Approximately how much does your organisation spend annually on business communications services within the UK across all sites.

Please do not include turnover from overseas.

SINGLE CODE.

Less than £5k	1
£5k - £9k	2
£10k - £24k.....	3
£25k - £49k	4
£50k - £99k.....	5
£100k - £249k.....	6
£250k - £499k.....	7
£500k - £999k	8
£5 million -£9 million	9
£10 million - £24 million	10
£25 million or more	11
Don't know.....	12

I'd now like to think about your business communications services.

ASK IF CODED A COMBINATION OF:

'both ISDN2/ISDN2e and ISDN30' - **CODE 4 AND 5 AT S6B OR**

'both ISDN2/ISDN2e and IP-based' - **CODE 4 AND 6 AT S6B OR**

'both ISDN30 and IP-based' - **CODE 5 AND 6 AT S6B OR**

'ISDN2/ISDN2e, ISDN30 and IP-based' - **CODE 4 AND 5 AND 6 AT S6B**

S13 You have said that you use <INSERT TEXT FROM ABOVE>. Which of these services would you say your business mostly uses?

SINGLE CODE

SHOW CODES FOR RELEVANT SELECTION AT S6B

Mostly ISDN2/ISDN2e	1 GO TO SECTION A
Mostly ISDN30.....	2 GO TO SECTION A
Mostly migrated to IP	3 GO TO SECTION D

FOR SECTIONS A-C <SERVICE> IS DEFINED BY S13 i.e.

CODE 1 - ISDN2/ISDN2e

CODE 2 - ISDN30

ASK IF CODED BOTH ISDN2/ISDN2E AND ISDN30 - CODES 4 AND 5 AT S6B

S14 Why does your company use both ISDN2/ISDN2e and ISDN30?

TYPE IN BELOW

SECTION A: ISDN Current Communications

ISDN RESPONDENTS ONLY - CODE 4/5 AT S6b OR CODE 1/2 AT S13

I'd now like to ask some questions about your <INSERT RELEVANT TEXT FROM S6b> service(s)

ASK ALL ISDN2/ISDN2e RESPONDENTS

A1a How many ISDN2/2e channels are in use across your organisation in the UK?

Note that 1 ISDN2/ISDN2e subscription = 2 channels, so for every subscription to ISDN2/ISDN2e you have, this counts as 2 channels.

SINGLE CODE

2 channels (1 ISDN2/ISDN2e subscription).....	1
4 channels (2 ISDN2/ISDN2e subscriptions)	2
6 channels (3 ISDN2/ISDN2e subscriptions)	3
8 channels (4 ISDN2/ISDN2e subscriptions)	4
10 - 18 channels (5 - 9 ISDN2/ISDN2e subscriptions)	5
20 -28 channels (10-14 ISDN2/ISDN2e subscriptions)	6
30 or more channels (15 or more ISDN2/ISDN2e subscriptions)	7
Don't know.....	8

ASK ALL ISDN30 RESPONDENTS

A1b How many ISDN channels are in use across your organisation in the UK?

Note that 1 ISDN30 subscription = 30 channels, so for every subscription to ISDN30 you have, this counts as 30 channels.

SINGLE CODE

30 channels (1 ISDN30 subscription).....	1
60 channels (2 ISDN30 subscriptions).....	2
90-120 channels (3-4 ISDN30 subscriptions).....	3
150-270 channels (5-9 ISDN30 subscriptions)	4
300-420 channels (10-14 ISDN30 subscriptions)	5
450-570 channels (15-19 ISDN30 subscriptions)	6
600-1470 channels (20-49 ISDN30 subscriptions)	7
1500 or more channels (50 or more ISDN30 subscriptions)	8
Don't know.....	9

ASK ABOUT ISDN 2/2e AND ISDN30 IF THEY USE BOTH (USING SEPARATE COLUMNS)

A2 Can you specify whether you use <SERVICE> for the following business uses?

MULTICODE

Incoming calls	1
Outgoing calls	2
Calls between different sites	3
Internet services	4
Fax services.....	5
Security/alarm systems.....	6
Data services	7
Card payments	8
Video conferencing.....	9
Other (specify)	10
Don't know.....	11 SINGLE CODE

ASK ABOUT ISDN 2/2e AND ISDN30 IF THEY USE BOTH (REPEAT QUESTION)

A3 You have said that you use <SERVICE> for the following purposes. Please rank the top three most important functions for which your company uses <SERVICE>?

SINGLE CODE a,b,c

	First (a)	Second (b)	Third (c)
Incoming calls	1	1	1
Outgoing calls	2	2	2
Calls between different sites	3	3	3
Internet services	4	4	4
Fax services	5	5	5
Security/alarm systems	6	6	6
Data services	7	7	7
Card payments	8	8	8
Video conferencing	9	9	9
Other (specify)	10	10	10

ASK ABOUT MAIN ISDN SERVICE

A4 Does your company have a switch i.e. PBX or PABX?

SINGLE CODE

Yes..... 1
No..... 2
Don't know..... 3

CODE 1 AT A4

A5 Approximately, how often do you replace your switch(es)?

SINGLE CODE

Every month 1
Every 2 months..... 2
Every 3..... 3
Every 6 months..... 4
Yearly 5
Every 2 years 6
Longer than 2 years 7
Never replaced the switches before 8
Don't know..... 9

CODE 1 AT A4

A6 Are you planning to replace your switch(es) in the next twelve months?

SINGLE CODE

Yes..... 1
No..... 2

Don't know..... 3

CODE 1 AT A4

A7 Is your switch IP-enabled (i.e. can it be connected to IP based telephone services instead of <SERVICE>)?

SINGLE CODE

Yes..... 1
No..... 2
Don't know..... 3

CODE 1 AT A4

A8 What functionality will the switch(es) in your organisation need to incorporate over the next 12 months to meet your company's business communication needs?

MULTICODE

ISDN 1
IP-based networking..... 2
Voicemail..... 3
LAN connectivity..... 4
ADSL/DSL/Broadband 5
Call queuing and routing 6
Unified communications e.g. with mobiles 7
More lines 8
Other (specify) 9
Don't know 10 SINGLE CODE

ASK ABOUT MAIN ISDN SERVICE

A9 Which supplier(s) do you use for <ISDN 2/2e / ISDN30 SERVICES>

MULTICODE

BT..... 1
Colt Communications 2
Daisy Communications 3
KCOM (incl. Kingston Communications & Affiniti) . 4
Virgin Media (incl. NTL:Telewest) 5
Opal Communications..... 6
Unicom 7
XLN 8
AT&T 9
MCI10
Global Crossing11
Spitfire12
Vodafone (inc. Cable & Wireless).....13
Other (specify)14
Don't know 15 SINGLE CODE

ASK ABOUT ISDN 2/2e AND ISDN30 IF THEY USE BOTH (USING SEPARATE COLUMNS)

A10 Approximately how much does your organisation spend annually, across all UK sites, on < ISDN 2/2e / ISDN30> services?

SINGLE CODE

Under £1,000	1
£1,000 to £2,499	2
£5,000 to £9,999	3
£10,000 to £19,999	4
£20,000 to £49,999	5
£50,000 to £99,999	6
£100,000 to £249,999	7
£250,000 to £499,999	8
£500,000 to £999,999	9
£1,000,000 to £4,999,999	10
£5,000,000 to £9,999,999	11
£10,000,000 or more	12
Don't know	13

ASK ABOUT MAIN ISDN SERVICE

A11 Approximately how long have you been using your <ISDN 2/2e / ISDN30> services?

SINGLE CODE

Less than six months	1
Six month to twelve months	2
Twelve months to eighteen months	3
Eighteen months to Twenty-Four months	4
Two to Five years	5
Six to Ten years	6
Ten to Fifteen years	7
Sixteen to Twenty Years	8
Over Twenty Years	9
Don't know	10

ASK ABOUT ISDN 2/2e AND ISDN30 IF THEY USE BOTH (USING SEPARATE COLUMNS)

A12 Do you consider < ISDN 2/2e / ISDN30> to be...

SINGLE CODE

A primary service	1
A supplementary service used in addition to your main one	2
A back-up system in case your main system fails ..	3
Other (specify)	4
Don't know	5

SECTION B: ISDN Usage

ISDN RESPONDENTS ONLY - CODE 4/5 AT S6b OR CODE 1/2 AT S13

I'd now like to ask you some questions specifically about your usage of your <ISDN2/2e / ISDN 30> services.

ASK ABOUT MAIN ISDN SERVICE

B1 Do you purchase <SERVICE> as ...

SINGLE CODE

- A standalone service 1
- Part of a package of in-house services..... 2
- Part of a managed or hosted solution..... 3
- Don't know 4

ASK IF CODES 2-4 AT B1

B2 What other services are provided as well as <SERVICE> ?

SINGLE CODE

- PSTN..... 1
- ADSL/Fibre broadband..... 2
- Call management/routing..... 3
- Leased lines/VPNs 4
- PBX or Centrex service 5
- Other (specify) 6
- Don't know 7

ASK ABOUT ISDN 2/2e AND ISDN30 IF THEY USE BOTH (REPEAT QUESTION)

B3a Overall, what do you regard as the main functional value(s) of <ISDN 2/2e / ISDN 30 SERVICE> for your organisation?

MULTICODE.

ASK ABOUT ISDN 2/2e AND ISDN30 IF THEY USE BOTH (REPEAT QUESTION)

B3b What is the most important functional value?

SINGLE CODE.

	B3a	B3b
Flexible line capacity	1	1
Call management functionality	2	2
Easy to use	3	3
Reliable	4	4
Requires little post purchase support	5	5
Voice connectivity	6	6
Data connectivity	7	7
Provides voice & data communications via the same service	8	8
LAN connectivity	9	9
CTI capability	10	10
Other (specify)	11	11
Don't know	12	12

ASK ABOUT MAIN ISDN SERVICE

B4 Have you ever switched your <ISDN 2/2e / ISDN 30 SERVICE> supplier?

SINGLECODE.

- Yes - switched in the last two years 1
 Yes - switched longer ago than the last two years 2
 No - have never switched 3
 Don't know 4

SWITCHED SUPPLIER - CODE 1-2 AT B4.

B5 What prompted you to switch or consider switching your <ISDN 2/2e / ISDN 30 SERVICE> supplier?

MULTICODE.

- Contract came to an end 1
 Was offered a better deal (price) 2
 Was offered better quality of service..... 3
 Was offered a more attractive package/range of services 4
 Other (specify) 5
 Don't know 6 SINGLE CODE

ASK ABOUT MAIN ISDN SERVICE

B6 Are you currently considering switching away from <ISDN 2/2e / ISDN 30 SERVICE> services?

NOTE: This is changing away from the **service** not just a different supplier.

SINGLE CODE

Yes..... 1
No..... 2
Don't know..... 3

NOT CONSIDERING SWITCHING - CODE 2 AT B6.

B7 Why would you not consider switching from <ISDN 2/2e / ISDN 30 SERVICE>?

MULTICODE, THEN RANK ANSWERS.

<SERVICE> is reliable 1
Good contacts at existing company 2
Tied to long term contract..... 3
Price of alternative services too high 4
Hassle 5
Current supplier(s) understand our business..... 6
Historic links to existing company(s)..... 7
Was offered a more attractive package/range of services 8
Easier to manage one supplier 9
High internal costs associated with switching10
Current service features are what we need11
Other (specify)12
Don't know..... 13 SINGLE CODE

CONSIDERING SWITCHING - CODE 1 AT B6.

B8 What do you perceive are the benefits of switching away from <ISDN 2/2e / ISDN 30 SERVICE>?

MULTICODE, THEN RANK ANSWERS.

Lower price 1
Better value for money 2
Less expensive equipment required 3
Greater functionality 4
More reliable 5
Better service features 6
Requires little post purchase support..... 7
Provides voice and data communications via the same service 8
More scalability as company grows 9
More flexibility to add/change services10
Ability to change numbering beyond local exchange 11
More options for LAN connectivity.....12
Other (specify)13
Don't know..... 14 SINGLE CODE

CONSIDERING SWITCHING - CODE 1 AT B6.

B9 Do you have any hang-ups/concerns about moving away from <SERVICE> ?

MULTICODE. THEN RANK ANSWERS.

- Yes - Reliability of alternative 1
- Yes - Security of alternative 2
- Yes - High price of alternative 3
- Yes- Other (specify) 4
- No - None.....5 SINGLE CODE
- Don't know.....6 SINGLE CODE

ASK ABOUT MAIN ISDN SERVICE

B10 If the price of <SERVICE> increased by 10% across all suppliers, to what extent would this influence your decision to stay or switch away from <SERVICE>? In imagining this scenario people often respond differently to how they would in a **real situation**. Please bear this in mind when answering the questions below and try to respond as if this was a real situation. Your decision **will not** affect the real life future prices charged for your <SERVICE> services by your provider(s).

SINGLECODE.

- We would definitely switch away from
<SERVICE> 1
- We would be more likely to to switch away
from <SERVICE>..... 2
- This would be a consideration, but unlikely to
affect our descion to stay 3
- Would have no impact - would keep <SERVICE> . 4
- Don't know..... 5

ASK IF CODES 2, 3, 4 OR 5 AT B10

B10b By what percentage would the price you pay for <SERVICE> have to increase (assuming the prices of other communication services do not increase) for you to definitely switch away from <SERVICE>?

LOGIC TEST INSTRUCTION. PERCENTAGE MUST BE 11% OR HIGHER

Write in percentage _____%

ASK ABOUT MAIN ISDN SERVICE (CODES 1, 2, 3, 4 OR 5 AT B10)

B11 How sure are you that you would make this decision in a real situation?

SINGLECODE.

Definitely certain	1
Probably certain	2
Probably uncertain	3
Definitely uncertain	4
Don't know	5

ASK ABOUT ISDN 2/2e AND ISDN30 IF THEY USE BOTH (USING SEPARATE COLUMNS)

B12 How long do you envisage continuing to use <SERVICE> services for?

SINGLECODE.

Less than six months	1
Six months to a year	2
A year to two years.....	3
Two to five years	4
Six to ten years	5
More than ten years	6
Don't know.....	7

ASK ABOUT ISDN 2/2e AND ISDN30 IF THEY USE BOTH (USING SEPARATE COLUMNS)

B13 What are you planning to use when you stop using your <SERVICE> ?

MULTICODE.

SHOW IF NOT CODE 1 AT S13 ISDN2/2e	1
SHOW IF NOT CODE 2 AT S13 ISDN30	2
SIP Trunking	3
Hosted VOIP.....	4
IP Centrex.....	5
Other IP technology (specify)	6
Non-IP Centrex	7
Leased lines / VPN.....	8
Ethernet	9
Other NON-IP service (specify)	10
Would not replace service	11 SINGLE CODE
None - Closing down.....	12 SINGLE CODE
Not thought about it	13 SINGLE CODE
Don't know.....	14 SINGLE CODE

ASK ABOUT ISDN 2/2e AND ISDN30 IF THEY USE BOTH (USING SEPARATE COLUMNS)

- B14 If you had to replace <SERVICE>, which services do you think would be the best replacement? In imagining this scenario people often respond differently to how they would in a real situation. *Please bear this in mind when answering the questions below and try to respond as if this was a real situation.*

MULTICODE, THEN RANK ANSWERS

SHOW IF NOT CODE 1 AT S13 ISDN2/2e	1
SHOW IF NOT CODE 2 AT S13 ISDN30	2
SIP Trunking	3
Hosted VOIP.....	4
IP Centrex.....	5
Other IP technology (specify)	6
Non-IP Centrex	7
Leased lines / VPN.....	8
Ethernet	9
Other NON-IP service (specify)	10
Don't know.....	11 SINGLE CODE

SECTION C: Awareness of IP Based Services
ISDN RESPONDENTS ONLY - CODE 4/5 AT S6b OR CODE 1/2 AT S13

I would now like to ask you some questions about IP services.

ASK ALL ISDN USERS THAT ARE NOT USING IP-BASED ALTERNATIVES (CODE 6 AT S6B)

- C1 Have you heard of IP-based alternatives to <SERVICE> (e.g. SIP trunking?). IP-based solutions are services based on internet protocol technology that can be used as a replacement for <SERVICE> services. This includes VoiceoverIP (VOIP) telephony services, including SIP Trunking solutions and Centrex services provided by IP networks (so called 'hosted VOIP' solutions).

SINGLECODE

Yes.....	1
No.....	2 GO TO END OF SECTION
Don't know.....	3 GO TO END OF SECTION

ASK ALL AWARE OF IP-BASED ALTERNATIVES - CODE 1 AT C1

- C2 Can I confirm whether you have any plans to move from <SERVICE> to IP services in the next 12 months to 2 years?

SINGLECODE

Yes.....	1
No.....	2

Don't know..... 3

ASK ALL AWARE OF IP-BASED ALTERNATIVES - CODE 1 AT C1

C3 Has your company ever had experience trialling IP services?

SINGLECODE

Trialling these services currently 1
 Planning to trial these services in the near future 2
 Have trialled these services but decided not to
 go ahead..... 3
 Trialled these services and plan to implement
 in near future 4
 None of the above 5 GO TO C5A
 Don't know 6 GO TO C5A

ASK ALL TRIALLED/PLANNING TO TRIAL - CODE 1-2 OR 4 AT C3

C4 Are you planning to implement these services permanently at the end of your trial?

SINGLECODE

Yes..... 1
 Too early to say 2
 No..... 3
 Don't know..... 4

ASK IF C3=3

C5b What were your concerns about moving to IP technologies?

ASK ALL AWARE OF IP-BASED ALTERNATIVES (CODE 1 AT C1) AND NOT C3=3

C5a Do you have any concerns about moving to IP technologies?

MULTICHOICE, THEN RANK ANSWERS.

Don't know enough about it 1
 Quality of service 2
 Reliability 3
 Resilience 4
 Security..... 5
 Price 6
 Unable to meet business needs 7
 Cost of investment needed 8
 Lack of commercial offerings..... 9
 Immaturity of commercial offerings 10
 Happy with current system 11
 Other (specify) 12

Don't know..... 13 SINGLE CODE
 No concerns..... 14 SINGLE CODE

ISDN RESPONDENTS NOT USING IP SERVICES TO GO TO SECTION 7

SECTION D: IP Services

IP RESPONDENTS ONLY - CODE 6 AT S6b OR CODE 3 AT S13

NB: ISDN USERS THAT HAVE IP WILL ALSO QUALIFY FOR THIS SECTION

I would now like to ask you some questions about IP services.

ASK ALL IP RESPONDENTS

D1 What type of IP services do you use?

MULTICODE

SIP trunking 1
 Hosted VOIP..... 2
 IP Centrex..... 3
 Other (specify) 4
 Don't know..... 5 SINGLE CODE

D2 Can you specify whether you use IP-based services for the following business uses?

MULTICODE

Incoming calls 1
 Outgoing calls 2
 Calls between different sites 3
 Internet services 4
 Fax services..... 5
 Security/alarm systems..... 6
 Data services 1
 Card payments 2
 Video conferencing 3
 Other (specify) 4
 Don't know..... 5 SINGLE CODE

- D3 You have said that you use IP-based services for the following purposes. Could you rank the top three most important functions for which your company uses IP-based services?

SINGLE CODE a,b,c - UP TO 3 ANSWERS ONLY.

	First (a)	Second (b)	Third (c)
Incoming calls	1	1	1
Outgoing calls	2	2	2
Calls between different sites	3	3	3
Internet services	4	4	4
Fax services	5	5	5
Security/alarm systems	6	6	6
Data services	7	7	7
Card payments	8	8	8
Video conferencing	9	9	9
Other (specify)	10	10	10

- D4 Does your company have a switch i.e. PBX or PABX?

SINGLECODE

Yes..... 1
 No..... 2
 Don't know..... 3

ASK ALL IP RESPONDENTS

- D5 Have any of the following previously acted as a trigger for moving [from ISDN2/2e or ISDN 30 - NB: ONLY SHOW THIS TEXT IF THEY HAVE SWITCHED FROM ISDN2/2e or ISDN 30 AT S6C] to IP-based services for your organisation?

MULTICODE

Switch replacement 1
 Part of general upgrade 2
 Changed supplier 3
 Other trigger (please specify) 4
 We've only ever had IP based services/
 we have not moved services 5 SINGLE CODE
 Don't know..... 6 SINGLE CODE

ASK IF CODE 1 AT D4

- D6 What functionality will the switch(es) in your organisation need to incorporate over the next 12 months to meet your company's business communication needs?

MULTICODE

ISDN	1
IP-based networking.....	2
Voicemail.....	3
LAN connectivity	4
ADSL/DSL/Broadband	5
Call queuing and routing	6
Unified communications e.g. with mobiles	7
More lines	8
Other (specify)	9
Don't know	10 SINGLE CODE

ASK ALL IP RESPONDENTS

- D7 Which supplier(s) do you use for IP-based services?

MULTICODE

BT.....	1
Colt Communications	2
Daisy Communications	3
KCOM (incl. Kingston Communications & Affiniti) .	4
Virgin Media (incl. NTL:Telewest)	5
Opal Communications.....	6
Unicom	7
XLN	8
AT&T	9
MCI	10
Global Crossing	11
Spitfire	12
Vodafone (inc. Cable & Wireless).....	13
Other (specify)	14
Don't know	15 SINGLE CODE

D8 Approximately how much does your organisation spend annually, across all UK sites, on IP-based services?

SINGLE CODE

Under £1,000	1
£1,000 to £2,499	2
£5,000 to £9,999	3
£10,000 to £19,999	4
£20,000 to £49,999	5
£50,000 to £99,999	6
£100,000 to £249,999	7
£250,000 to £499,999	8
£500,000 to £999,999	9
£1,000,000 to £4,999,999	10
£5,000,000 to £9,999,999	11
£10,000,000 or more	12
Don't know	13

D9 Approximately how long have you been using IP-based services? **SINGLE CODE**

Less than six months	1
Six month to twelve months	2
Twelve months to eighteen months	3
Eighteen months to Twenty-Four months	4
Two to Five years	5
Six to Ten years	6
Ten to Fifteen years	7
Sixteen to Twenty Years	8
Over Twenty Years	9
Don't know	10

D10 Do you consider IP to be...

SINGLE CODE

Your primary service	1
A supplementary service used in addition to your main service	2
A back-up system in case your main system fails ..	3
Other (specify)	4
Don't know	5

SECTION E: IP Usage
IP RESPONDENTS ONLY - CODE 6 AT S6b OR CODE 3 AT S13
NB: ISDN USERS THAT HAVE IP WILL ALSO QUALIFY FOR THIS SECTION

I'd now like to ask you some questions specifically about your usage of IP services.

ASK ALL IP RESPONDENTS

E1a What were your reasons(s) for choosing to implement IP services? **MULTICODE**

E1b What was your most important reason for choosing to implement IP services? **SINGLE CODE**

	E1a	E1b
Quality of service	1	1
Reliability	2	2
Resilience	3	3
Security	4	4
Price- lower rental than ISDN30	5	5
Price- lower rental than ISDN2	6	6
Price - lower call costs	7	7
Free on-net calls	8	8
Additional features	9	9
Flexibility (able to deliver traffic to different locations)	10	10
On-demand capacity/scalability	11	11
To maximise existing PBX investment	12	12
To integrate voice and data services	13	13
As part of system upgrade	14	14
Other (please specify)	15	15
Don't know	16	16

E2 Did the move to IP require investment in new equipment?

SINGLECODE

Yes..... 1
 No..... 2
 Don't know..... 3

MOVE REQUIRED INVESTMENT - CODE 1 AT E2

E3 Approximately, how much did it cost to move to IP services?

SINGLE CODE

Under £1,000	1
£1,000 to £2,499	2
£2,500 to £4,999	3
£5,000 to £9,999	4
£10,000 to £19,999	5
£20,000 to £49,999	6
£50,000 to £99,999	7
£100,000 to £249,999	8
£250,000 to £499,999	9
£500,000 to £999,999	10
£1,000,000 to £4,999,999	11
£5,000,000 to £9,999,999	12
£10,000,000 or more	13
Don't know	14

ASK ALL IP RESPONDENTS

E4 Has the move to IP saved you money on your regular bills?

SINGLECODE

Yes.....	1
No.....	2
We've only ever had IP based services/ we have not moved services	3
Don't know.....	4

SAVED ON BILLS - CODE 1 AT E4

E5 Approximately, how much did you save by moving to IP services?

SINGLECODE

Under £1,000	1
£1,000 to £2,499	2
£2,500 to £4,999	3
£5,000 to £9,999	4
£10,000 to £19,999	5
£20,000 to £49,999	6
£50,000 to £99,999	7
£100,000 to £249,999	8
£250,000 to £499,999	9
£500,000 to £999,999	10
£1,000,000 to £4,999,999	11
£5,000,000 to £9,999,999	12
£10,000,000 or more	13
Don't know	14

ASK ALL IP RESPONDENTS

- E5b** Which one of the following best describes your use of analogue telephone lines (fixed telephone lines that are not ISDN lines) after you moved to IP services?

SINGLE CODE

- Didn't have any analogue line(s) and still don't ... 1
- Didn't have any analogue line(s) but added
one or more 2
- Had any analogue line(s) and kept at least one 3
- Had any analogue line(s) but removed all of
them..... 4
- Don't know..... 5

ASK IF CODES 4 OR 5 AT S6B AND NOT CODES 1 OR 2 AT S13 (NB: THESE RESPONDENTS USE ISDN BUT IT IS NOT THEIR MAIN SERVICE)

- E6** To what extent is your organisation still using any ISDN2/2e or ISDN30 services?

HAVE SEPARATE COLUMNS FOR ISDN 2/2e AND ISDN30

SINGLE CODE FOR EACH COLUMN

- A supplementary service used in addition to
your main service 1
- A back-up system in case your main system fails .. 2
- Other (specify) 3
- Not at all 4
- Don't know 5

ASK IF STILL USE ISDN2/2E AND/OR ISDN30 - CODE 1 AT E6

- E7a** What does your organisation still use your [ISDN2/2e /ISDN30] service for?

MULTICODE

ASK IF MORE THAN 1 USED AT E7a**PULL THROUGH CODES SELECTED AT E7a**

E7b And what is the main reason you still use your [ISDN2/2e /ISDN30] service?

SINGLE CODE

	E7a	E7b
Incoming calls	1	1
Outgoing calls	2	2
Calls between different sites	3	3
Internet services	4	4
Fax services	5	5
Security/alarm systems	6	6
Data services	7	7
Card payments	8	8
Video conferencing	9	9
Other (specify)	10	10

ASK ALL IP RESPONDENTS THAT STILL USE ISDN2/2E AND/OR ISDN30 - CODE 1 AT E6

E8a Why hasn't your organisation migrated all of your ISDN usage to IP services?

MULTICODE**ASK IF MORE THAN 1 USED AT E8a****PULL THROUGH CODES SELECTED AT E8a**

E8b And what is the main reason you haven't migrated all of your ISDN usage to IP services?

SINGLE CODE

ISDN is reliable	1
Good contacts at existing ISDN company	2
Tied to long term contract.....	3
Hassle	5
Current supplier(s) understand our business.....	6
Historic links to existing ISDN company(s)	7
Was offered an attractive package/range of services	8
Internal cost of migrating	9
Current service features are what we need	10
Other (specify)	11
None of the above	12 SINGLE CODE
Don't know.....	13 SINGLE CODE

ASK ALL IP RESPONDENTS (ALL IP USERS SHOULD ANSWER THIS)

E9 Overall, what do you regard as the main functional value(s) of IP-based services for your organisation?

MULTICODE

- Flexible line capacity 1
- Call management functionality 2
- Easy to use 3
- Reliable 4
- Requires little post purchase support 5
- Voice connectivity 6
- Data connectivity 7
- Provides voice & data communications via the same service 8
- LAN connectivity 9
- CTI capability 10
- LAN connectivity 11
- Unified communications capability 12
- Other (specify) 13
- Don't know 14 SINGLE CODE

SECTION 7: END OF SURVEY
ALL RESPONDENTS

F1 Finally, would you be willing to be re-contacted in the future for this project specifically?

SINGLE CODE

- Yes 1
- No 2

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