

**Fixed vs. Mobile Voice and Broadband  
AUGUST 2013**

**MOBILE PHONE BOOST SCREEN QUESTIONS**

QA Is there a landline phone in your home that can be used to make and receive calls?

1. Yes – ASK SECOND PART OF QUESTION
2. No – COUNT AS MOBILE ONLY SAMPLE

Do you have broadband/internet at home?

3. Yes – THANKS AND CLOSE
4. No – COUNT AS OFFLINE SAMPLE

***IF CLARIFICATION REQUIRED WE ARE ASKING ABOUT FIXED BB NOT MOBILE INTERNET / BB***

**LANDLINE NUMBERS BOOST SCREEN QUESTIONS**

QA Do you have broadband/internet at home?

1. Yes – THANKS AND CLOSE
2. No – COUNT AS OFFLINE SAMPLE

**SCREENING AND QUOTAS**

**ASK ALL ONLINE**

Q1 Standard panel introduction wording. Screen for standard & sensitive industries.

1. Market research
2. Marketing/advertising
3. Financial services
4. Retail/wholesale
5. Legal, accountancy and professions
6. Food and drink
7. Travel and tourism
8. Telecoms/mobile phones
9. Car manufacturers
10. Others

**MUST CODE 3-7, 9 OR 10 TO PROCEED**

Q2. Do you personally use any of these?

1. A mobile phone – DON'T SHOW FOR MOBILE ONLY SAMPLE BUT CODE
2. Local buses to travel to work – DON'T SHOW FOR PHONE
3. SatNav/GPS
4. A local doctors surgery – DON'T SHOW FOR PHONE
5. Life insurance – DON'T SHOW FOR PHONE
6. An iPad/tablet
7. A games console (Xbox, Playstation, Wii, Nintendo etc)
8. Kindle
9. No none

Q3. Do you personally have any of these at your home address?

1. A dishwasher – DON'T SHOW FOR PHONE
2. A landline that can be used to make or receive calls (not a mobile) – DON'T SHOW FOR MOBILE ONLY SAMPLE
3. An American style fridge – DON'T SHOW FOR PHONE
4. A Plasma TV
5. A Dab/Digital radio
6. No none

**ASK ALL**

Q4. What is your age?

1. 17 or younger
2. 18-24
3. 25-34
4. 35-44
5. 45-54
6. 55 -64
7. 65-74
8. Older

**MUST CODE 2-8 TO PROCEED. ONLINE QUOTAS +/- 15%**

Under 24	285
25-34	510
35-54	920
55+	585
	2300

Q5. Are you?

**FOR PHONE CODE BY OBSERVATION. DON'T ASK**

1. Male
2. Female
3. Refused

**MUST CODE 1-2 TO PROCEED. ONLINE QUOTAS +/- 15%**

Male	1120
Female	1180

Q6A. Which of these best describes the occupation of the chief income earner in your household?

1. Full time student
2. Retired on a state pension only
3. Retired with a private pension – **ASK Q6B**
4. Skilled manual work
5. Semi and unskilled manual work
6. Not working
7. Senior management or professional in an organisation with over 250 employees
8. Senior / middle management or professional in an organisation with less than 250 employees
9. Middle management or professional in an organisation with over 250 employees
10. Supervisory or clerical and junior managerial, administrative or professional
11. None of these/refused

Q6B. Which of these best describes the occupation of the chief income earner before retirement?

1. Skilled manual work
2. Semi and unskilled manual work
3. Senior management or professional in an organisation with over 250 employees
4. Senior / middle management or professional in an organisation with less than 250 employees
5. Middle management or professional in an organisation with over 250 employees
6. Supervisory or clerical and junior managerial, administrative or professional

**MUST CODE 1-9 TO PROCEED. ONLINE QUOTAS +/- 15%**

AB	665
C1	724
C2	413
DE	498
	2300

Q7. In which of these regions do you live?

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

**MUST CODE 1-2,4-12 TO PROCEED. ONLINE QUOTAS +/- 15%**

North East, North West, Yorks	559
East + West Midlands, East of England	597
London; SE + SW	840
Scotland and Wales	304
	2300

## OWNERSHIP AND FREQUENCY OF USE

### IF MOBILE AT Q2

Q8. Is your mobile?

1. A smartphone that lets you do things like email, access the internet, connect to wifi (e.g. iPhone, Blackberry, Galaxy etc)
2. A more basic mobile phone
3. Not sure

### IF MOBILE AT Q2

Q9a. Do you ever do any of these on your mobile phone?

1. Email
2. Connect to the internet with wifi / a hot spot
3. Connect to the internet using your mobile phone network and not wifi
4. None of them

### IF ANY – CODES 1-3 AT Q9

Q9b. Do you have a mobile phone package?

1. That includes some data usage in the tariff/bundle
2. Or do you pay as you go for data usage

### ASK ALL

Q10. Do you ever use a dongle (a USB stick that can be plugged into a PC or laptop to connect to mobile broadband)?

1. No
2. Yes for email
3. Yes for internet with wifi / a hot spot
4. Yes for internet using your mobile phone network and not wifi

### IF ANY – CODES 1-3 AT Q9 OR CODES 2-4 AT Q10

Q11. In an average week, how long do you spend on your mobile [IF Q9/1-3] / dongle [CODES 2-4 AT Q10] for email or internet?

1. 1 hour a day or more
2. Several hours a week
3. At least once hour a week
4. At least half an hour a week
5. At least 15 minutes a week
6. Less than 15 minutes a week

**ASK ALL**

**EXCEPT OFFLINE SAMPLE code 4 at QA which get coded at 2**

Q12. Do you have internet at home that is not through a dongle or mobile?

1. Yes
2. No

**IF HAVE HOME INTERNET AT Q12**

Q13. What type of home internet access do you have?

1. Standard speed broadband (ADSL)
2. Fast fibre / superfast broadband e.g. BT infinity or fast Virgin service
3. Narrowband / dial up
4. Not sure

**IF BROADBAND [ CODE 1 OR 2 ] AT Q13**

Q14. Is your home broadband/ internet package, one ...?

1. With unlimited usage
2. With a usage limit
3. Not sure

**IF HAVE HOME INTERNET AT Q12**

Q15. In an average week, how long do you spend on your home broadband/internet\_for\_email or internet?

1. 1 hour a day or more
2. Several hours a week
3. At least once hour a week
4. At least half an hour a week
5. At least 15 minutes a week
6. Less than 15 minutes a week

## ATTACHMENT & USAGE

### IF HAVE MOBILE AT Q2

- Q16. Can you get a good mobile phone signal at home?
1. Yes
  2. No

### IF HAVE MOBILE AT Q2

- Q17. Do you ever get frustrated with your mobile phone signal when out and about?
1. All the time
  2. Sometimes
  3. No

### ALL THAT DON'T ACCESS INTERNET ON MOBILE - CODE 4 AT Q9

- Q18. Has any past experience of email or internet on your mobile put you off it or made you want it?
1. Yes put me off a lot
  2. Put me off a bit
  3. Made me want it
  4. No past experience

### IF ANY – CODES 1-3 AT Q9

- Q19. Do you do any of these at least once a week via the internet on your mobile phone?

#### ROTATE ORDER

1. Play games against others online
2. Download videos or music or other large files
3. Watch live TV
4. Use TV iPlayers / watch streamed content e.g. TV shows, films, etc
5. Upload content to the internet e.g. photos, videos, blog posts
6. For social networks like facebook and Twitter
7. Use for work
8. Youtube
9. Spotify, Deezer, Last.fm and other music services
10. None of these

**IF HAVE HOME INTERNET AT Q12 / QA**

Q20. Do you do any of these at least a few times a week using the internet on your home broadband/internet?

**ROTATE ORDER**

1. Play games against others online
2. Download videos or music or other large files
3. Watch live TV
4. Use TV iPlayers / watch streamed content e.g. TV shows, films, etc
5. Upload content to the internet e.g. photos, videos, blog posts
6. For social networks like facebook and Twitter
7. Use for work
8. Youtube
9. Spotify, Deezer, Last.fm and other music services
10. None of these

Q21. Q22. DELETED

**IF HAVE MOBILE AND LANDLINE – AT Q2 AND Q3**

Q23. Overall would you say you are more attached to?

1. Your mobile
2. Your home phone/landline
3. Both equally– DON'T READ OUT

**IF HAVE MOBILE AND LANDLINE – AT Q2 AND Q3**

Q24. Which do you consider your main way of making phone calls?

1. Your mobile
2. Your home phone/landline
3. Both equally– DON'T READ OUT

Q25. DELETED



## ADOPTION AND CANCELLATIONS

### PHONE TEXT

I would now like to understand how likely you are to take up a number of services in the next year or so? So to begin with, in the next year or so how likely are you to get [INSERT]

### ONLINE

How likely are you to take up each of the following in the next year or so ?

	Q26 A mobile phone	Q27. A mobile Smartphone that lets you do things like email, access the internet	Q28. Using your <u>mobile phone network</u> for internet	Q29. A landline at home	Q30. <u>Home</u> broadband	Q31. Fast fibre / superfast broadband <u>at home</u>
FILTER	NO MOBILE AT Q2	NO SMARTPHONE AT Q8	ASK ALL NON USERS  I.E. NO MOBILE / OR NOT USING AT Q9A/Q10	NO LANDLINE AT Q3/QA	ALL NON-USERS - NO LANDLINE AT Q3 OR QA / NO INTERNET AT Q12	ASK ALL NON USERS I.E. NO LANDLINE AT Q3/QA / NO INTERNET AT Q12 / OR NOT CODE 2 AT Q13
Very likely						
Fairly likely						
Neither likely / nor unlikely						
Not very likely						
Not at all likely						
Not sure						

**IF LIKELY TO GET MOBILE AT Q26**

Q32. Which, if any, of these describes why you are getting a mobile?

1. For safety
2. I want one / I like them
3. I can afford it
4. I want to be able to stay in contact on the move
5. It's a necessity
6. I want email access and internet on the move
7. I might get rid of my landline
8. Other – please write in

**IF LIKELY TO GET A SMART PHONE AT Q27 – DON'T ASK IF Q32 ASKED**

Q33. Which, if any, of these describes why you are getting a mobile Smartphone?

1. I need a new handset /old one needs replacing
2. I'm due an upgrade / will get it with my mobile package
3. I want one / I like them
4. I can afford it
5. It's a necessity
6. I want email access and internet on the move
7. Other – please write in

**IF LIKELY TO START USING MOBILE INTERNET AT Q28**

Q34. Which, if any, of these describes why you might use your mobile phone network to connect to the internet?

1. I want 4G / fast internet
2. To be faster than my home broadband / internet [ONLY SHOW IF HOME INTERNET AT Q12]
3. I'm due an upgrade / will come with new handset
4. I want it / I like it
5. I can afford it
6. It's a necessity
7. I want email access and internet on the move
8. Other – please write in

**IF LIKELY TO GET LANDLINE AT Q29**

Q35. Which, if any, of these describes why you are getting a landline?

1. For home broadband/internet
2. For my work
3. I can afford it
4. Better call quality
5. It's a necessity
6. I might get rid of my mobile
7. I'm getting my own home
8. Other – please write in

**IF LIKELY TO GET FIXED INTERNET AT Q30**

Q36. Which, if any, of these describes why you are getting home broadband/internet?

1. Mobile too slow [ONLY SHOWN IF ALREADY USE MOBILE INTERNET AT Q9a/Q10]
2. Mobile too unreliable [ONLY SHOWN IF ALREADY USE MOBILE INTERNET AT Q9a/Q10]
3. I need it for work
4. I need it for other things like TV, video (other high bandwidth applications)
5. I want it / I like it
6. I can afford it
7. It's a necessity
8. Other – please write in

**IF LIKELY TO ADOPT FIBRE / FAST BB AT Q31 – DON'T ASK IF ASKED Q36 ALREADY**

Q37. Which, if any, of these describes why you might get fast fibre / superfast broadband at home?

1. I want faster internet / current slow
2. I need it for work
3. I need it for other things like TV, video (other high bandwidth applications)
4. I want it / I like it
5. I can afford it
6. It's a necessity
7. Other – please write in

**PHONE**

I would now like to understand how likely you are to get rid of a number of services in the next year or so? So how likely are you to get rid of [INSERT]

**ONLINE**

How likely are you to get rid of the following in the next year or so?

	Q38 your landline	Q39. <u>Home</u> broadband/ Internet	Q40 Your mobile	Q41 internet on your [INSERT (1) MOBILE (2) DONGLE (3) MOBILE AND DONGLE]
<b>FILTER</b>	<b>LANDLINE AT Q3</b>	<b>YES AT AT Q12</b>	<b>IF MOBILE AT Q2</b>	<b>INSERT [1] IF CODES 1-3 AT Q9A AND CODE 1 AT Q10</b>  <b>INSERT [2] IF CODES 4 AT Q9A AND CODE 2-4 AT Q10</b>  <b>INSERT [3] IF CODES 1-3 AT Q9A AND CODE 2-4 AT Q10</b>
Very likely				
Fairly likely				
Neither likely / nor unlikely				
Not very likely				
Not at all likely				
Not sure				

**IF LIKELY TO GET RID OF LANDLINE**

Q42. Which, if any, of these describes you why might get rid of your landline at home?

1. I don't use / need it
2. I cannot afford it
3. I prefer to use my mobile
4. Other – please write in

**IF LIKELY TO GET RID OF FIXED BROADBAND**

Q43. Which, if any, of these describes why you might get rid of your home broadband/internet?

1. I don't use / need it
2. I cannot afford it
3. Home broadband too slow/frustrating
4. Mobile internet more convenient
5. Mobile internet faster
6. I prefer to use my mobile
7. Other – please write in

**IF LIKELY TO GET RID OF MOBILE**

Q44. Which, if any, of these describes why you might get rid your mobile phone?

1. I don't use / need it
2. I cannot afford it
3. I prefer to use my home landline
4. Other – please write in

**IF LIKELY TO GET RID OF MOBILE BROADBAND**

Q45. Which, if any, of these describes why you might stop using internet on your mobile phone?

1. I don't use / need it
2. I cannot afford it
3. Mobile internet too slow/frustrating
4. Home broadband more convenient
5. Home broadband internet faster
6. I prefer to use my mobile
7. Other – please write in

## SCENARIOS

### ASK ALL

Q46 Are you aware of 4G – this is a new mobile network service that offers higher internet speeds?

1. Definitely aware
2. I think I'm aware of this
3. Not sure
4. Not aware

### IF DEFINITELY

Q47. Do you know which mobile networks have already launched 4G – please mention all those that have?

1. Vodafone
2. Orange
3. 3
4. O<sub>2</sub>
5. Virgin
6. T-Mobile
7. Everything Everywhere
8. Other

### IF DEFINITELY

Q48 How likely are you to subscribe to 4G?

1. Very likely
2. Fairly likely
3. Neither likely / nor unlikely
4. Not very likely
5. Not at all likely
6. Not sure

**ALL WITH FIXED INTERNET AT Q13**

Q48B Do you know the typical speed you get on your home broadband / internet service?

WRITE IN Mb PER SECOND	<input type="checkbox"/> Don't know exactly
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**ID DON'T KNOW EXACTLY**

Q48C Does the the typical speed you get on your home broadband / internet service fall into these bands?

1. Up to 2Mb
2. More than 2Mb less than 5Mb
3. At least 5Mb but less than 10Mb
4. At least 10Mb but less than 20Mb
5. At least 20Mb but less than 40Mb
6. 40Mb or more
7. Don't know

**ALL WITH FIXED INTERNET AT Q13**

Please now think about using broadband through the mobile network under a number of different circumstances.

For each of the scenarios below, how likely you would be to buy a mobile broadband service?

	Q49 If mobile was slower than your home broadband but cheaper	Q50. If mobile was the same speed as your home broadband but £5 a month more	Q51. If mobile was the same speed as your home broadband and the <u>same</u> price	Q52. If mobile was faster than your home broadband but £5 a month more	Q53. If mobile was faster than your home broadband but the <u>same</u> price
Very likely to use it					
Fairly likely					
Neither likely / nor unlikely					
Not very likely use it					
Not at all likely to use it					
Not sure					

**ALL WITH FIXED INTERNET LIKELY AT ANY OF Q49-Q53**

Q54A. You indicated that you might consider buying a mobile broadband service. If the mobile broadband service met your needs, would get rid of your home broadband or pay for both services?

1. Definitely get rid of home broadband
2. Fairly likely to get rid of home broadband
3. Not sure
4. Fairly likely to pay for both
5. Definitely keep both

**ALL WHO MIGHT GET RID OF FIXED AT ANY Q54A (CODES 1 – 2)**

Q54B. You might swap your home broadband service for mobile broadband - which of these would you consider major reasons for keeping your home broadband service?

1. Additional / high charges for data usage on mobile broadband
2. The reliability of the mobile network/signal
3. Not being able to get landline quality phone calls
4. All of them
5. None of them
6. Other – please write in



## CLASSIFICATION

The final questions are to understand you and your household in a bit more detail.

Q55. How many people live in your household?

1. Just me
2. Two
3. Three
4. Four
5. Five
6. Six or more

Q56. Are there any children of these ages in your household?

7. Children under 12
8. Children 12-18
9. Older children
10. No children

Q57. Do you/your family own the house that you live in or is it rented?

1. Own – outright
2. Own with a mortgage
3. Rent [ONLY SHOWN IF Q55/1]
4. Rent with friends/non family [ONLY SHOWN IF Q55/2-6]
5. Rent with family members/partner [ONLY SHOWN IF Q55/2-6]

Q58. Would you say you are more of a homebody or someone who likes to be out and about all the time?

1. More of a home body
2. Out and about all the time
3. In between

Q59. Thinking about facebook, twitter and other social networking sites, would you say you ...?

1. Love / are addicted to them
2. Like them
3. Are indifferent
4. Dislike them

Q60. When it comes to new gadgets, technology and toys, would you say you ...?

1. Are always the one to them first
2. Like them but don't get them first
3. Tend to get them after every one else

Q61. Do you run a business from home – that is to say you have no other premises?

1. Yes
2. No

**IF YES**

Q62. And do you spend most of your work time?

1. Based at / working from home
2. Out and about
3. Both equally