

SME CONSUMER EXPERIENCE 2022

Questionnaire ONLINE FINAL

INTRODUCTION:

BVA BDRC are conducting a survey amongst businesses on behalf of Ofcom, the regulator for the UK communications industries, about their views on communications services in the UK.

Ofcom has asked us to conduct a research project to better understand how businesses are using communications services, in other words landlines, mobile phones and the internet - including email, the web and related services. The research will help Ofcom identify areas where there is a need for further advice, information or support. We would appreciate some of your time to contribute to this important study.

We would like to reassure you that your answers will be anonymised and held in the strictest confidence. Neither your identity nor your organisation's name will be passed on to Ofcom. Your open and honest views are enormously 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.

The survey will take around 20 minutes depending on your responses.

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 are interested in speaking to people responsible for IT and telecoms across a wide range of businesses.

We treat all data processed in adherence with the Market Research Society's Code of Conduct. By completing the survey you consent to the collection of this information for research purposes.

Your opinions are very important to us. Thank you for your participation.

If you would like to check our credentials, you can call the Market Research Society, free of charge, on 0500 39 69 99.

For further information about your legal rights and how to exercise these please see the Privacy Notice on our website: www.bva-bdrc.com

SCREENING

ASK ALL

This study requires us to interview a broad range of UK businesses so the first few questions about your organisation are purely to ensure that we include a true cross-section of industry.

S1. First of all, which of the following best describes the sector in which you operate?

PLEASE SELECT A SINGLE RESPONSE

- Private sector - primary (agriculture, manufacturing, construction) 1
- Private sector - retail/wholesale 2
- Private sector - services 3

- Public sector - central government 4
- Public sector - regional government 5
- Public sector - local government 6
- Public sector - other 7
- Third sector, including charities, NGOs, quangos, not for profits etc. 8

S2a. Which of the following best describes how much control your organisation has when it comes to making purchasing decisions in relation to communications services? This would include decisions about your landline, mobile phone and internet services (including both email and web access), as well as relevant support services.

PLEASE SELECT A SINGLE RESPONSE

- We hold our own budget and can decide how to use it 1 **CONTINUE**
- We have an input but not a complete say 2 **CONTINUE**
- We only implement decisions that are made elsewhere (parent company, PCT or Head Office) 3
- IF PUBLIC SECTOR (codes 4-7 at S1) CONTINUE**
- IF PRIVATE/VOLUNTARY SECTOR CLOSE**

S2b. And which of the following best describes the responsibility you *personally* have for making purchasing decisions in relation to these communications services for the organisation?

PLEASE SELECT A SINGLE RESPONSE

- I am solely responsible 1 **SKIP TO S3**
- I am jointly responsible with somebody else .. 2 **SKIP TO S3**
- Someone else has primary responsibility 3
- IF PUBLIC SECTOR (codes 4-7 at S1) CONTINUE**
- IF PRIVATE/VOLUNTARY SECTOR CLOSE**

ASK S2c IF CODE 3 AT S2b

S2c. In that case can I just double check - do you have managerial responsibilities, and can you comment in detail on your organisation's experiences using communications providers and services? SINGLE CODE

PLEASE SELECT A SINGLE RESPONSE

Yes..... CONTINUE

No..... CLOSE

ASK ALL

S3. Could I please confirm your exact job title?

PLEASE SELECT A SINGLE RESPONSE

- 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 or other ITC specialist..... 7
- Other senior manager 8
- PA / Office manager 9
- Other (please type in)10

ASK ALL

S4b. Is your organisation a network or service provider, or a reseller of telecoms or IT?

PLEASE SELECT A SINGLE RESPONSE

- Yes.....CLOSE
- No.....Continue

ASK ALL

S5a. Including yourself, how many people does your organisation currently employ in the UK either full or part time?

PLEASE TYPE IN. ALLOW DON'T KNOW

ASK S5B IF DON'T KNOW AT S5A. OTHERS SKIP TO S6

S5b. Which of the following size bands does your organisation fall into? SINGLE CODE

- 1, work on your own/no employees 1
- 2, you plus one partner or employee 2
- 3-4..... 3
- 5-9..... 4
- 10-19..... 5
- 20-49..... 6
- 50-99..... 7
- 100-249..... 8
- 250+..... 9
- Don't know..... 13

SEE QUOTA

CLOSE

IF STILL DON'T KNOW AT S5b, TAKE FROM SAMPLE

ASK ALL

- S6. How many sites or offices does your organisation operate from in the UK? Please exclude home working where it's not the primary place of business.

PLEASE SELECT A SINGLE RESPONSE

| | |
|------------------|---|
| 1..... | 1 |
| 2..... | 2 |
| 3..... | 3 |
| 4..... | 4 |
| 5-9 | 5 |
| 10-49 | 6 |
| 50 or more..... | 7 |
| Don't know | 8 |
| Refused | 9 |

- S7. Are you [SOLE TRADER] / members of your organisation [2 OR MORE Staff]

PLEASE SELECT A SINGLE RESPONSE

| | |
|--|---|
| Entirely office based..... | 1 |
| Mainly office based | 2 |
| A mix of in and out of an office | 3 |
| Mainly work away from an office | 4 |
| Entirely work away from an office..... | 5 |

- S8. And what were your [SOLE TRADER] / members of your organisation's [2 OR MORE Staff] working arrangements prior to the start of the COVID-19 pandemic?

PLEASE SELECT A SINGLE RESPONSE

| | |
|--|---|
| Entirely office based | 1 |
| Mainly office based | 2 |
| A mix of in and out of an office | 3 |
| Mainly work away from an office | 4 |
| Entirely work away from an office..... | 5 |
| Not applicable - organisation started since the pandemic began..... | 6 |

- S9. Please can you provide the full postcode of your head office _____?
If home is the primary place of business please use this postcode.

PLEASE TYPE IN

S10. **URBANITY**

Which of the following best describes the location of your organisation's head office? Please give your best estimate if you don't know exactly.

If home is the primary place of business please use this location.

PLEASE SELECT A SINGLE RESPONSE

- Large City (population: more than 500,000) 1
- Smaller city / large town (population: 100,000 - 500,000) 2
- Medium town (population: 15,000 - 99,999) 3
- Small town (population: 2,000 - 14,999) within 10 miles of a large settlement 4
- Small town (population: 2,000 - 14,999) further than 10 miles from a large settlement 5
- Rural area (population: less than 2,000) within 10 miles of a large settlement 6
- Rural area (population: less than 2,000) further than 10 miles of a large settlement 7

1,2,3,4,5 = Urban

6= Rural

7= Remote rural

NOTE TO SCRIPTER: PLEASE CODE ALL GROUPS AS WE MAY WANT TO SPLIT OUT 1 AND 2 TOGETHER AND 3, 4 AND 5 TOGETHER DURING FURTHER ANALYSIS

S11. **REGION** And in which of the following regions is your organisation's head office?

If home is the primary place of business please use this location.

PLEASE SELECT A SINGLE RESPONSE

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

SEE QUOTA

MAIN QUESTIONNAIRE

SECTION ALL: SERVICES USED

The next few questions will be about the communications services your organisation uses.

ASK ALL

QA1a Which of the following does your organisation use for business purposes?

PLEASE SELECT ALL THAT APPLY. MULTICODE.

- 1) **Standard phone (PSTN)** Public Switched Telephone Network (i.e. the normal phone network / landline)
- 2) **ISDN 2 / 2e** a form of ISDN line offering connection of up to 8 digital devices and allowing for two calls (or a voice call and data call) to be made at the same time
- 3) **ISDN 30** a form of ISDN line offering 8 to 30 independent connections and allowing for multiple calls to be made at the same time
- 4) **Managed VoIP** (sometimes called SIP trunking) - uses a data connection for high-quality voice calls. Usually a monthly cost and often calls are made and received in a similar way to traditional fixed-line voice calls using desktop phones and phone numbers
- 5) **Other VoIP or video conferencing** e.g. using an unmanaged Over The Top service such as Skype, Facetime, Microsoft Teams, Google Meet, Zoom etc.
- 6) **Mobile phones** (including smartphones e.g. iPhone, Samsung Galaxy etc.) that staff at your organisation use for business purposes (including business or personal phones, whether or not the organisation pays for or contributes towards them)
- 7) **Leased line or private circuit used for services OTHER THAN a dedicated internet connection** any dedicated connectivity for any purpose, such as point to point data communications; also known as analogue, traditional, Ethernet products
- 8) **Advanced voice services** hosted voice service which provides additional features such as call waiting, call diversion, voicemail, hunt group numbers and/or extensions; e.g. Centrex, FeatureLine, or a 'hosted PBX'
- 9) **Other** (please type in)
- 10) **None of these**
- 11) **Don't know**

ASK ALL

QA1b Which of the following does your company use for internet connectivity?

PLEASE SELECT ALL THAT APPLY. MULTICODE 1-6.

- 1) **Fixed-line broadband** - a service like those taken by residential consumers where the speed is described as "up to" and where the service is shared with other users, meaning that the speeds delivered to your premises will vary according to how many other customers in your local area are using the internet. The cost per month is usually £80 or less for one broadband connection
- 2) **Dedicated internet access** - service such as an Ethernet leased line internet access product which gives your premises its own uncontended internet connection meaning that the speeds to your premises are guaranteed and not affected by other customers. The cost per month is typically at least £100 and often much more.

- 3) **Mobile broadband delivered by a mobile phone network** - this is a service delivered by 3G,4G or 5G technology either directly to a smartphone or device with an embedded SIM card, or to a 'dongle' which is plugged into the USB slot on a computer. Mobile broadband can also be used by 'tethering' a phone to a PC, or by using services such as MiFi
- 4) **Fixed-wireless broadband** - this is a service which delivers a broadband service over a wireless connection. It is different from a mobile connection, as the service is fixed to a single location and may sometimes use an external aerial attached to your premises
- 5) **Dial-up** - this is when you access the internet **via** ISDN, in contrast to a broadband service
- 6) **Satellite broadband service**
- 7) **None of these**
- 8) **Don't know**

ASK ALL WITH FIXED-LINE BROADBAND (CODE 1 AT QA1B):

QA2a Which of the following fixed broadband services do you receive?

PLEASE SELECT ALL THAT APPLY. MULTICODE 1-5

- 1) Standard broadband provided using the traditional copper network (ADSL or SDSL)
- 2) Fibre/superfast provided using a cable network [nearly always provided by Virgin Media, provided by WightFibre in the Isle of Wight]
- 3) Fibre/superfast provided using the traditional copper network - Fibre to the Cabinet (FTTC)
- 4) "Full-fibre"/Fibre/superfast using new fibre networks - Fibre to the Premises (FTTP)
- 5) Fibre/superfast - don't know/not sure on type
- 6) Don't know

ASK ALL WITH DEDICATED INTERNET ACCESS (CODE 2 AT QA1B):

QA2b Which of the following dedicated internet access do you use?

PLEASE SELECT ALL THAT APPLY. MULTICODE 1-8

1. Fibre Ethernet leased line (sometimes called Ethernet Access Direct/EAD or Full Fibre Ethernet)
2. Ethernet over copper (EoC) leased line (sometimes called Ethernet in the First Mile (EFM))
3. Ethernet over Fibre To The Cabinet (EoFTTC) leased line (sometimes called Generic Ethernet Access (GEA) over FTTC)
4. Ethernet over Fibre To The Premises (EoFTTP) leased line (sometimes called Generic Ethernet Access (GEA) over FTTP)
5. Dedicated Fixed Wireless Access
6. Links provided by managed network provider as an IP-VPN
7. Links provided by managed network provider, exact connectivity unknown
8. Other type of dedicated internet access / leased line (please type in)
9. Don't know

We would like you to think about the services you've just been asked about for the rest of the interview; if you have personal contracts for these services, we would like you to think about your experience of using them for business purposes only.

ASK FOR ALL CODED AT QA1

QA2c What is the name of the company that is the main provider of your [coded at QA1]?
PLEASE TYPE IN ONE ANSWER FOR EACH. SINGLE CODE FOR EACH.

| | |
|---------------------------------|--|
| Mobile service | ALL WITH MOBILES [CODE 6 AT QA1a] |
| Landline service | ALL WITH FIXED LANDLINE [CODES 1, 2, 3 OR 8 AT QA1a] |
| Broadband/internet connectivity | ALL WITH INTERNET SERVICES [CODES 1-6 AT QA1b] |

| | | | | |
|--------------------------------|---|----|------------------------------|---|
| Alcatel | | 1 | Skype | |
| Alternative Networks | □ | 2 | Southern | □ |
| BT | □ | 3 | South West | □ |
| Cable and Wireless | □ | 4 | Spacotel | □ |
| Carphone Warehouse | □ | 5 | Spitfire | □ |
| Chess | □ | 6 | Supanet | □ |
| Colt | □ | 7 | Superline | □ |
| Claranet | □ | 8 | Swiftcall | □ |
| Daisy | □ | 9 | Talk Talk | □ |
| Demon | □ | 10 | Tesco Telecom | □ |
| DST (Directsave.com) | □ | 11 | Tiscali | □ |
| Eclipse | □ | 12 | Titan | □ |
| Everything Everywhere/EE | □ | 13 | Thus | □ |
| Excel | □ | 14 | thePhoneCoop | □ |
| Gamma | □ | 15 | T-mobile | □ |
| Global Crossing | □ | 16 | Tooway | □ |
| Homecall | □ | 17 | Toucan | □ |
| Intechnology | □ | 18 | "3" | □ |
| KCom (Kingston Communications) | □ | 19 | Unicom / Universal Utilities | □ |
| Janet | □ | 20 | Utility Warehouse | □ |
| One Bill | □ | 21 | Verizon | □ |
| Opal Communications/Pipex | □ | 22 | Virgin Media (NTL/ Telewest) | □ |
| Orange | □ | 23 | Vodafone | □ |
| O2 / BE | □ | 24 | Welcome Telecom | □ |
| Madasafish | □ | 25 | Yourcalls.net | □ |
| Pipex | □ | 26 | XLN telecom | □ |
| Plusnet | □ | 27 | 2E2 | □ |
| Post Office | | 28 | Resourced internally | |
| Primus | □ | 29 | Other (please type in) | □ |
| Rainbow | | 59 | {Don't know} | □ |
| Sky / Skytalk | □ | 30 | | |

ASK ALL WITH MOBILES (CODE 6 AT QA1a)

QA2d Thinking about the mobile phones and smartphones that you or staff at your organisation use for business purposes (including business or personal phones, whether or not your organisation pays for or contributes towards them), how many are used by your business? Please give your best estimate if you don't know the exact number.

PLEASE TYPE IN A NUMBER

ASK ALL WITH MOBILES (CODE 6 AT QA1a)

QA2e Does your organisation cover any of the cost of personal mobile devices/services that you or other staff use for business purposes?

PLEASE SELECT ALL THAT APPLY. SINGLE CODE 1,2 & 3

- No - personal mobiles are not used for business purposes .. 1
- No - personal mobiles are used for business purposes but business does not cover any of the cost 2
- Yes - business pays the full cost directly 3
- Yes - business partially reimburses employee 4
- Yes - business fully reimburses employee 5
- Yes - other arrangement (please type in) 6
- Don't know/not sure 7

ASK ALL WITH MOBILE INTERNET ACCESS (CODE 3 AT QA1B)

QA2f Which of the following mobile broadband connections does your business use?

PLEASE SELECT ALL THAT APPLY.

- 1) Via a smartphone
- 2) Via an enabled device, e.g. a tablet which has a mobile SIM
- 3) Via tethering a smartphone to a PC/laptop/tablet etc. (with a USB connection or Wif-Fi hotspot)
- 4) Via a mobile broadband 'dongle' connected to a PC/laptop
- 5) Via a cellular router such as a 'MiFi' unit
- 6) Don't know/not sure

ASK QA3 IF MORE THAN ONE SERVICE USED AT QA1A/QA1b.

QA3 For each service you have, which ones are bundled together in a package with a single provider?

If you have bundles of services with more than one provider, please tell us which services you have with each provider you have a bundled package with.

A bundle is when you purchase two or more of your telephone, internet or other communications services from the same communications provider, either on the same contract or on contracts that are linked. For example, the contracts may be linked because the supplier requires you to purchase one service to receive the other, or because you receive a discount for purchasing them together. If the bundle includes a mobile service you may also be required to pay the remaining balance of any mobile phone handset costs in full if you decide to end the mobile service contract.

If you have different bundles at different sites, please record the services you have in your largest bundle at one site.

PLEASE SELECT ONE ANSWER FOR EACH SERVICE. SHOW SERVICES USED AT QA1A/B. IF ANY SERVICES SELECTED UNDER A 'BUNDLED' COLUMN, AT LEAST TWO SERVICES MUST BE SELECTED IN THAT COLUMN. IF ONLY ONE SERVICE USED, DO NOT ASK

| | Not bundled - Standalone service | Bundled - Provider 1 | Bundled - Provider 2 | Bundled - Provider 3 |
|--|----------------------------------|----------------------|----------------------|----------------------|
| Fixed Landline (1/2/3/8 @ QA1a) | 1 | 1 | 1 | 1 |
| Mobile phone (including smartphone) (6 @ QA1a) | 2 | 2 | 2 | 2 |
| Broadband/Cable/Fibre internet (1@ QA1b) | 3 | 3 | 3 | 3 |
| Mobile broadband via a device with an embedded SIM card, e.g. a tablet which has a mobile SIM (2 @ QA2f) | 5 | 5 | 5 | 5 |
| Mobile broadband via a dongle or a cellular router such as a 'MiFi' unit (4,5 @ QA2f) | 6 | 6 | 6 | 6 |
| Dial up internet (5 @ QA1b) | 7 | 7 | 7 | 7 |
| Fixed wireless broadband (4 @ QA1b) | 8 | 8 | 8 | 8 |
| Leased lines/private circuits (8 @ QA1a) | 9 | 9 | 9 | 9 |
| Dedicated internet access (2 @ QA1b) | 10 | 10 | 10 | 10 |
| Satellite broadband (6 @QA1b) | 11 | 11 | 11 | 11 |

BUNDLE GROUPING DEFINITIONS FOR ROUTING PURPOSES:

LANDLINE AND INTERNET: CODE 1 AND ANY OF CODES 3-11 WITH SAME PROVIDER AT QA3

LANDLINE AND MOBILE: CODE 1 AND CODE 2 WITH SAME PROVIDER AT QA3

LANDLINE, INTERNET AND MOBILE: CODE 1 AND CODE 2 AND ANY OF CODES 3-11 WITH SAME PROVIDER AT QA3

MOBILE AND INTERNET: CODE 2 AND ANY OF CODES 3-11 WITH SAME PROVIDER AT QA3

ASK IF HAVE LEASED LINES OR PRIVATE CIRCUITS AND DO NOT HAVE FIBRE BROADBAND (CODE 7 AT QA1a OR CODE 2 AT QA1b BUT NOT CODES 2-5 AT QA2a)

QA4a Thinking about your leased lines, are you considering switching from using leased lines to using a fibre broadband service instead in the next 12 months? If yes, which type of fibre broadband service are you considering?

PLEASE SELECT ALL THAT APPLY. MULTICODE 1-3. SINGLE CODE 4-6.

- 1) Yes - Fibre/superfast provided using a cable network [nearly always provided by Virgin Media, or provided by WightFibre in the Isle of Wight]
- 2) Yes - Fibre/superfast provided using the traditional copper network - Fibre to the Cabinet (FTTC)
- 3) Yes - "Full-fibre"/Fibre/superfast using new fibre networks - Fibre to the Premises (FTTP)
- 4) Yes - Fibre/superfast, but not sure which type
- 5) No
- 6) Not sure

ASK IF HAVE FIBRE BROADBAND AND DO NOT HAVE LEASED LINES OR PRIVATE CIRCUITS (CODES 2-5 AT QA2a BUT NOT CODE 7 AT QA1a OR CODE 2 AT QA1b)

QA4b Thinking about your fibre / superfast broadband service, did this service replace a leased line service? If yes, was this in the last 12 months or longer ago?

By fibre/superfast we mean any of the three types of fibre broadband.

PLEASE SELECT A SINGLE RESPONSE.

- | | |
|---------------------------------|---|
| Yes, within last 12 months..... | 1 |
| Yes, longer ago | 2 |
| No..... | 3 |
| Not sure..... | 4 |

ASK ALL WITH MOBILES (CODE 6 AT QA1a)

QA5. Thinking now about any mobile phones your organisation uses, which of the following do you or your staff ever use a smartphone for business purposes?

PLEASE SELECT ALL THAT APPLY. RANDOMISE 1-12.

- | | |
|--|---------------|
| No staff use smartphones for business purposes | 0 SINGLE CODE |
| Making and receiving voice calls..... | 1 |
| Sending and receiving texts | 2 |
| Sending and receiving emails | 3 |
| Taking any payments from customers e.g. using PayPal, Paym | 5 |

| | |
|---|----|
| Taking credit/debit card payments at the point of sale from customers via a card reader device connected to your smartphone e.g. iZettle, Payleven..... | 6 |
| Sending/receiving messages or calls using instant messaging services such as WhatsApp, i-message, BB Messenger, Google Talk, FaceTime..... | 7 |
| Video conferencing e.g. using Microsoft Teams, Google Meet, Zoom | 8 |
| Working out of office hours..... | 9 |
| Accessing business documents, systems and applications while away from the office | 10 |
| Web browsing | 11 |
| Using social media for business purposes | 12 |
| Other (please type in) | 13 |
| Don't know | |

ASK ALL

QA6 Which, if any, of the following internet applications does your organisation use for business purposes?

FOR ONLINE SPLIT RESPONSES ACROSS TWO AND SHOW THE FOLLOWING TEXT FOR THE SECOND SCREEN: The following are some more internet applications. Which, if any of these, does your organisation use for business purposes?

PLEASE SELECT ALL THAT APPLY.RANDOMISE 1-24.

| | |
|--|----|
| Web access | 1 |
| Company website | 2 |
| Email | 3 |
| Online banking..... | 4 |
| Online advertising or other online marketing (e.g. marketing via email, Facebook or Twitter) | 5 |
| VoIP or video conferencing (i.e. making calls over the internet using services such as Skype, Facetime, Microsoft Teams, Google Meet, Zoom etc.) | 6 |
| Paying for goods and services online..... | 7 |
| Ordering goods and services online | 8 |
| Taking orders for goods and services online | 9 |
| Taking payment for goods and services online | 10 |
| Tracking goods and services online..... | 11 |
| Tracking online sales | 12 |
| Using HMRC services (e.g. submitting PAYE information, VAT and company tax returns) | 13 |
| Using bespoke software or applications (e.g. accountancy packages) | 14 |
| Looking for advice on regulation or other general business advice | 15 |
| File Transfer Protocol or FTP..... | 16 |
| Online data storage or back-up | 17 |
| Cloud services IF NECESSARY : Cloud services are when your applications and data are stored off-site on a service provider's server and are accessible from any location via the internet | 18 |
| Remote login to work server (VPN)..... | 19 |
| Remote log-in to your work PC or laptop | 20 |
| IF 50+ EMPLOYEES (code 7+ at S5b): Company intranet | 21 |
| (i.e. an internal private network that is contained within the organisation) | |
| IF 50+ EMPLOYEES (code 7+ at S5b): Company extranet..... | 22 |
| (i.e. a private network to securely share part of a business's information or operations with external parties e.g. clients/providers) | |
| Video streaming | 23 |
| Web hosting | 24 |
| Other (please type in) | 25 |
| Don't know | 26 |
| None | 27 |

ASK ALL SELECTING MORE THAN ONE OF CODES 1-24 AT QA6

QA7 And which are the three most important internet applications for your business?

PLEASE RANK THE TOP THREE RESPONSES. ALLOW RESPONDENT TO RANK UP TO THREE.

SHOW ALL RESPONSES SELECTED AT QA6

ASK ALL

QA8 What, if any, back-up communications services do you have in place for your business, for example if your mobile or internet goes down, or isn't working at the level you need?

PLEASE SELECT ALL THAT APPLY. MULTICODE

- Have more than one mobileprovider/contract 1
- Have more than one internet
provider/contract 2
- Have more than one landline
provider/contract 3
- Have more than one provider/contract for
another service (please type in) 4
- Tethering to mobile/creating mobile hotspot
for internet connectivity on other devices.... 5
- Other (please type in) 6
- None 7
- Don't know 8

ASK ALL WITH INTERNET SERVICES (CODES 1-6 AT QA1b)

QA9 If your business has Wi-Fi, do you make use of any devices to boost or extend the signal from your Wi-Fi? If yes, when did you start using these?

PLEASE SELECT A SINGLE RESPONSE. SINGLE CODE.

- Yes - in the last 18 months 1
- Yes - longer ago 2
- No - have not made use of any devices to boost or extend Wi-Fi signal 3
- The business does not have Wi-fi 4
- Don't know 5

SECTION F: GENERAL ATTITUDES AND PERCEPTIONS

The next few questions are about your general attitudes and perceptions towards the communications services available.

ASK ALL

QF1. Are there any communications services that are not currently available to your organisation that you feel your business would benefit from being able to use? What are these?

PLEASE TYPE IN AS MUCH DETAIL AS POSSIBLE.

None 1

ASK ALL

QF2. Which of the following communications services, if any, are you actively looking at acquiring or upgrading in the next 12 months?

PLEASE SELECT ALL THAT APPLY. MULTI-CODE. RANDOMISE, BUT FIX TOGETHER CODES 3-4; 6-9 (WITH 9 ALWAYS LAST IN THE SERIES); 11-12. CODE 1 SINGLE CODE.

- Standard PSTN landline telephones 2
- 4G Mobile service 3
- 5G services 4
- ADSL Broadband (internet via fixed line)..... 5
- Fibre/superfast Broadband provided using a cable network [nearly always provided by Virgin Media, provided by WightFibre in the Isle of Wight] 6
- Fibre/superfast Broadband provided using the traditional copper network - Fibre to the Cabinet (FTTC)..... 7
- “Full-fibre”/Fibre/superfast Broadband using new fibre networks - Fibre to the Premises (FTTP) 8
- Fibre/superfast Broadband, but not sure which type..... 9
- Mobile Broadband through a USB Modem or ‘dongle’ 10
- ISDN 2/2e 11
- ISDN 30 12
- Leased lines or private circuits 13
- VPN 14
- Ethernet 15
- Voice over Internet Protocol or VoIP..... 16
- Video conferencing 17
- Other (please type in) 18

Not looking to acquire or upgrade any services1

ALL ACTIVELY LOOKING TO ACQUIRE VoIP (QF2 CODE 16)

QF3. Is your intention to acquire VoIP because of the coming migration from traditional to IP-based voice telephony?

PLEASE SELECT A SINGLE RESPONSE. SINGLE CODE

- Yes - entirely..... 1
- Yes - in part 2
- No..... 3
- Don't know/ not sure..... 4

ASK ALL

QF4. Thinking about each of the communications services your organisation uses, how important is each of these to your organisation? Please use a scale of 1 to 10 where:

- 1 is not at all important - there would be no impact on your business if it did not have this service
- 10 is absolutely vital - your business could not carry on without them

PLEASE SELECT ONE ANSWER FOR EACH.

RANDOMISE ORDER SERVICES 1-6 ARE SHOWN, FIX 'AT LEAST ONE FORM OF VOICE SERVICE' AT THE END. SINGLE CODE 1-10 AND DON'T KNOW.

| | |
|--|----------------------------|
| Fixed phone lines services (this includes standard lines and ISDN lines) | CODES 1, 2, 3, 8 FROM QA1a |
| Leased lines or private circuits used for purposes other than dedicated internet access | CODE 7 FROM QA1a |
| Mobile phone services (this includes smartphones and standard mobile phones) | CODES 6 FROM QA1A |
| Fixed internet services (this includes: dedicated lines, dial up, broadband and cable) | CODES 1, 2, 4, 5 FROM QA1b |
| Mobile internet services (this includes mobile internet via smartphone, dongle or USB modem) | CODE 3 FROM QA1b |
| Satellite broadband service | CODE 6 FROM QA1b |
| At least one form of voice service, e.g. landline phone, mobile phone etc. | ASK ALL |

ASK ALL OPERATING BEFORE THE PANDEMIC (S8 CODES 1-5)

QF5. For each service, to what extent has this changed since the start of the COVID-19 pandemic?

- Become more important 1
- Become less important 2
- No change 3
- Don't know/not sure..... 4

PLEASE SELECT ONE ANSWER FOR EACH.

RANDOMISE ORDER SERVICES 1-6 ARE SHOWN, FIX 'AT LEAST ONE FORM OF VOICE SERVICE' AT THE END. SINGLE CODE FOR EACH.

| | |
|--|----------------------------|
| Fixed phone lines services | CODES 1, 2, 3, 8 FROM QA1a |
| Leased lines or private circuits used for purposes other than dedicated internet access | CODE 7 FROM QA1a |
| Mobile phone services (this includes smartphones and standard mobile phones) | CODE 6 FROM QA1a |
| Fixed internet services (this includes: dedicated lines, dial up, broadband and cable) | CODES 1, 2, 4, 5 FROM QA1b |
| Mobile internet services (this includes mobile internet via smartphone, dongle or USB modem) | CODE 3 FROM QA1b |
| Satellite broadband service | CODE 6 FROM QA1b |
| At least one form of voice service, e.g. landline phone, mobile phone etc. | ASK ALL |

ASK ALL WITH INTERNET CONNECTIVITY (CODES 1-6 AT QA1B)

QF6a. Which of the following best describes how reliant your business is on the internet?

Without internet access...

PLEASE SELECT A SINGLE RESPONSE. SINGLE CODE

1. The business would not be able to operate at all
2. The business would be able to do some things without it, but not having access would have quite a big impact
3. We would be unable to do many things, but it would not affect the business too much
4. We would still be able operate the majority of our business without it
5. There would be no impact on our business if we did not have it

ASK ALL WITH INTERNET CONNECTIVITY (CODES 1-6 AT QA1B) OPERATING BEFORE THE PANDEMIC (S8 CODES 1-5)

QF6b. To what extent has your organisation's reliance on the internet changed since the start of the COVID-19 pandemic?

PLEASE SELECT A SINGLE RESPONSE. SINGLE CODE

1. Become more reliant
2. Become less reliant
3. No change
4. Don't know/not sure

ASK ALL WITH INTERNET CONNECTIVITY (CODES 1-6 AT QA1B)

QF7a. How important is it for staff and/or customers to have good quality wireless connectivity on your business premises?

By wireless connectivity we are interested in any devices connected using a non-fixed line connection.

Please use a scale of 1 to 10 where:

- 1 is not at all important - there would be no impact on your business if it did not have this service
- 10 is absolutely vital - your business could not carry on without them

PLEASE SELECT ONE ANSWER FOR EACH. SINGLE CODE 1-10, DON'T KNOW AND DO NOT USE WIRELESS CONNECTIVITY

IF WIRELESS CONNECTIVITY IS USED (NOT CODE 'DO NOT USE' AT QF7A)

QF7b. What is your wireless connectivity used for?

PLEASE SELECT ALL THAT APPLY. MULTICODE.RANDOMISE, BUT FIX TOGETHER CODES 4-5;
13-14

| | |
|---|----|
| Contactless / card payments / EPOS sales tills | 1 |
| Authentication | 2 |
| Provision of unlimited Wi-Fi to clients/customers | 3 |
| Staff connectivity to internal network | 4 |
| Staff connectivity to internet | 5 |
| Sending/ receiving/ accessing business data (e.g. sales records, information about stock etc.) | 6 |
| GPS location data..... | 7 |
| Access to data stored on the cloud | 8 |
| Stock updates/processing orders..... | 9 |
| Staff clock-in systems..... | 10 |
| Wireless printers | 11 |
| CCTV | 12 |
| Wi-Fi reliant calls..... | 13 |
| Wi-Fi reliant video conferencing | 14 |
| Offsite working..... | 15 |
| Other (please type in) | 98 |
| Don't know/not sure | 99 |

ASK ALL

QF8. The following are a number of statements that people have made about their organisation's attitude towards communications technology and services and other areas. For each one please can you say how much you agree or disagree with it, using the following scale...

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

To what extent do you agree or disagree with...

PLEASE SELECT ONE RESPONSE FOR EACH. RANDOMISE ORDER. SINGLE CODE FOR EACH

- We are confident that we know which new communications products or services are valuable for the business
- We feel well informed about how communications services can help our business survive and grow
- The needs of our business are well-catered for in the communications market
- We are aware of the regulations that protect our business when buying and using communications services
- Communications services are fundamental to our business; without them we could not function as a business
- We are worried about possible breaches of security in the communications services our business uses
- We are confident we understand what different communications services can provide for our business
- Our business is looking to grow over the next few years
- We are willing to pay more for a better service
- We invest time to get the best value for money from our communications services
- We trust our communications providers to look out for our business

ASK ALL

QF9. Now thinking about data security and sharing data online, has your business ever experienced any of the following?

PLEASE SELECT ALL THAT APPLY. MULTICODE. RANDOMISE ORDER 1-6.

| | |
|---|---|
| Received scam messages via e-mail (phishing) | 1 |
| Received scam messages via text/SMS (smishing) | 2 |
| Received scam messages via communications services like WhatsApp, Messenger, Signal etc. | 3 |
| Received scam messages via phone call (landline or mobile) | 4 |
| Cyber-attacks | 5 |
| Security breach involving communication services | 6 |
| Anything else (please type in) | 7 |
| None | 8 |

SECTION B: SATISFACTION

The next few questions are about your satisfaction with the communications services your organisation uses.

Overall satisfaction with MOBILE/LANDLINE/INTERNET

ASK QB1 FOR EACH OF THE FOLLOWING SERVICES USED AT QA1A/B. SINGLE CODE FOR EACH.

MOBILE: CODE 6 AT QA1a

LANDLINE: CODES 1, 2, 3 OR 8 AT QA1a

INTERNET: CODES 1, 2, 3, 4, 5 or 6 at QA1b

QB1. Thinking about the following services your organisation uses, please can you say how satisfied or dissatisfied you are with your overall experience, using the following scale.

PLEASE SELECT ONE RESPONSE FOR EACH.

RANDOMISE ORDER SERVICES ARE SHOWN. SINGLE CODE FOR EACH SERVICE.

| | |
|--|---|
| Very satisfied | 1 |
| Fairly satisfied | 2 |
| Neither satisfied nor dissatisfied | 3 |
| Fairly dissatisfied..... | 4 |
| Very dissatisfied | 5 |
| Don't know | 6 |
| Not applicable | 7 |

| | |
|------------------|--|
| Mobile service | ALL WITH MOBILES [CODE 6 AT QA1a] |
| Landline service | ALL WITH FIXED LANDLINE [CODES 1,2,3 OR 8 AT QA1A] |
| Internet service | ALL WITH INTERNET SERVICES [CODES 1-6 AT QA1b] |

SCRIPTING INSTRUCTION: PLEASE RANDOMISE ORDER OF ASKING MOBILE (QB2 - QB4), LANDLINE (QB5 - QB7) AND INTERNET (QB8-B11) SECTIONS BETWEEN INTERVIEWS.

INTERNET: CODES 1, 2, 3, 4, 5 OR 6 AT QA1b

LANDLINE: CODES 1, 2, 3 OR 8 AT QA1a

MOBILE: CODE 6 AT QA1a

MOBILE

B2-B4 - ASK ALL WITH MOBILE PHONES (CODE 6 AT QA1A)

For the next few questions please think about your mobile service.

QB2. Thinking specifically about the mobile phones (including smartphones) that you or staff at your organisation use for business purposes (whether or not your organisation pays for or contributes towards them), the following are some different aspects of the service experience. For each one, please can you say how satisfied or dissatisfied you are with this area of your organisation's mobile phone service, using the following scale.

| | |
|--|---|
| Very satisfied | 1 |
| Fairly satisfied | 2 |
| Neither satisfied nor dissatisfied | 3 |
| Fairly dissatisfied..... | 4 |
| Very dissatisfied | 5 |
| Don't know | 6 |
| Not applicable | 7 |

How satisfied or dissatisfied are you with...

PLEASE SELECT ONE RESPONSE FOR EACH. RANDOMISE ORDER. SINGLE CODE FOR EACH.

- The reliability of the reception or signal strength
- The repair time for faults with the connection
- The geographic availability of the service (i.e. the breadth of coverage)
- The ease of contacting the provider's customer service department
- The quality of the service provided by the provider's customer service staff
- The value for money of the service provided
- The level of compensation provided by the provider when something goes wrong

ASK ALL WITH MOBILES (CODE 6 AT QA1a)

QB3. What, if any, issues or problems has your organisation encountered with your mobile phone service in the last 12 months?

PLEASE SELECT ALL THAT APPLY. MULTICODE. CODE 0 SINGLE CODE. RANDOMISE CODES 1-17 (BUT NOT CODES 0 OR 18)

| | |
|--|----|
| No issues experienced in the last 12 months | 0 |
| Increased charges | 1 |
| Unexpected additional charges | 2 |
| Terms and conditions (e.g. those you were not aware of) .. | 3 |
| Unsolicited/nuisance or silent calls | 4 |
| Mis-selling (service received was not what was sold originally) | 5 |
| Poor customer service | 6 |
| Lack of provider support/assistance outside typical office hours..... | 7 |
| Poor voice quality | 8 |
| Poor mobile coverage | 9 |
| Calls dropping out when making a voice call | 10 |

| | |
|---|----|
| Unable to send texts/ messages | 11 |
| Delays in receiving texts/ messages | 12 |
| Poor mobile internet coverage..... | 13 |
| Slow speeds connecting to/ when connected to internet ... | 14 |
| Unable to connect to Wi-Fi | 15 |
| Unable to download documents / pictures | 16 |
| Slow upload speeds | 17 |
| Other (please type in) | 18 |

ASK ALL EXPERIENCING ANY PROBLEMS WITH MOBILE SERVICE (NOT CODE 0 AT QB3)

QB4. And on a scale of 1 to 10 where 1 denotes “No impact at all” and 10 denotes “Very great impact”, to what extent did this/these problem(s) with your mobile service have an impact your business?

PLEASE SELECT ONE RESPONSE. SINGLE CODE 1-10

END OF MOBILE SECTION

LANDLINE

ASK B5 TO B7 IF LANDLINE (CODES 1, 2, 3 OR 8 AT QA1A)

For the next few questions please think about your landline service.

QB5. The following are some different aspects of the service experience. For each one, please can you say how satisfied or dissatisfied you are with this aspect of your landline service?

| | |
|--|---|
| Very satisfied | 1 |
| Fairly satisfied | 2 |
| Neither satisfied nor dissatisfied | 3 |
| Fairly dissatisfied..... | 4 |
| Very dissatisfied | 5 |
| Don't know | 6 |
| Not applicable | 7 |

How satisfied or dissatisfied are you with...

PLEASE SELECT ONE RESPONSE FOR EACH. RANDOMISE ORDER. SINGLE CODE FOR EACH

- The reliability of the landline service/connection (e.g. being able to make a call when you need to and getting a dialling tone reliably)
- The clarity of the line (e.g. being able to clearly hear the other person on the call)
- The repair time for faults with the connection
- The ease of contacting the provider's customer service department
- The quality of the service provided by the provider's customer service staff
- The value for money of the service provided
- The level of compensation provided by the provider when something goes wrong
- The ease of installation

ASK ALL WITH LANDLINE (CODES 1, 2, 3 OR 8 AT QA1A)

QB6. What, if any, issues or problems has your organisation encountered with your landline service in the last 12 months?

PLEASE SELECT ALL THAT APPLY. MULTICODE. CODE 0 SINGLE CODE.

| | |
|---|---|
| No issues experienced in the last 12 months | 0 |
| Increased charges | 1 |
| Unexpected additional charges | 2 |
| Terms and conditions (e.g. those you were not aware of) .. | 3 |
| Unsolicited/nuisance or silent calls | 4 |
| Mis-selling (service received was not what was sold originally) | 5 |
| Poor customer service | 6 |
| Lack of provider support/assistance outside typical office hours..... | 7 |
| Poor voice quality | 8 |
| Poor service reliability (loss of service/technical fault) | |
| Other (please type in) | 9 |

ASK ALL WHO EXPERIENCED ISSUES WITH LANDLINE (QB6 NOT CODE 0)

QB7. And on a scale of 1 to 10 where 1 denotes “No impact at all” and 10 denotes “Very great impact”, to what extent did this/these problem(s) with your landline service have an impact your business?

PLEASE SELECT ONE RESPONSE. SINGLE CODE 1-10

END OF LANDLINE SECTION

INTERNET

ASK B8 TO B11 TO ALL WITH INTERNET SERVICES (CODES 1-6 AT QA1b)

For the next few questions please think about your internet service.

QB8 The following are some different areas of the service experience. For each one, please can you say how satisfied or dissatisfied you are with this area of your internet service?

| | |
|--|---|
| Very satisfied | 1 |
| Fairly satisfied | 2 |
| Neither satisfied nor dissatisfied | 3 |
| Fairly dissatisfied..... | 4 |
| Very dissatisfied | 5 |
| Don't know | 6 |
| Not applicable | 7 |

How satisfied or dissatisfied are you with...

PLEASE SELECT ONE RESPONSE FOR EACH. RANDOMISE ORDER. SINGLE CODE FOR EACH

- The reliability of the connection
- The repair time for faults with the connection
- The geographic availability of the service (i.e. the ability to obtain the service where your company is based)
- The ease of contacting the provider's customer service department
- The quality of the service provided by the provider's customer service staff
- The speed of service while online
- The value for money of the service provided
- The level of compensation provided by the provider when something goes wrong
- The ease of installation

ASK ALL WITH INTERNET SERVICES (CODES 1-6 AT QA1b)

QB9 What, if any, issues or problems has your organisation encountered with your internet service in the last 12 months?

PLEASE SELECT ALL THAT APPLY. MULTICODE. CODE 0 SINGLE CODE.

| | |
|---|----|
| No issues experienced in the last 12 months | 0 |
| Increased charges | 1 |
| Unexpected additional charges | 2 |
| Terms and conditions (e.g. those you were not aware of) .. | 3 |
| Mis-selling (service received was not what was sold originally) | 4 |
| Poor customer service | 5 |
| Lack of provider support/assistance outside typical office hours..... | 7 |
| Poor service reliability (loss of service/technical fault)..... | 7 |
| Slow download speeds..... | 8 |
| Slow upload speeds | 9 |
| Poor installation of service by engineer | 10 |
| Other (please type in) | 11 |

ASK ALL WHO EXPERIENCED ISSUES WITH INTERNET (QB9 NOT CODE 0)

QB10. And on a scale of 1 to 10 where 1 denotes “No impact at all” and 10 denotes “Very great impact”, to what extent did this/these problem(s) with your internet service have an impact your business?

PLEASE SELECT ONE RESPONSE. SINGLE CODE 1-10

ASK ALL FOR WHOM ISSUES HAD AN IMPACT (QB10 CODES 2-10)

QB11. What impact did the problems with your internet service have on your business?

PLEASE SELECT ALL THAT APPLY. MULTICODE. RANDOMISE CODES 1-8.

- | | |
|--|----|
| Lost business | 1 |
| Unable to provide services to customers | 2 |
| Unable to complete online transactions, e.g. paying bills, taking payments | 3 |
| Unable to conduct searches for information | 4 |
| Unable to upload content | 5 |
| Unable to download a software update/patch | 6 |
| Unable to download other content | 7 |
| Damaged reputation with clients/customers | 8 |
| Other (please type in) | 9 |
| Don't know | 10 |

END OF INTERNET SECTION

SECTION C: SWITCHING

The next few questions are about switching communications service providers.

QC1/QC2/QC3. Have you ever switched your provider of each of the following services? If so, when was this?

PLEASE SELECT A SINGLE RESPONSE. SINGLE CODE

- Yes, in the last 6 months..... 1
- Yes, 7 - 12 months ago 2
- Yes, 13 - 18 months ago..... 3
- Yes, 1.5 to 2 years ago 4
- Yes, 2 to 3 years ago..... 5
- Yes, more than 3 years ago..... 6
- No, never changed provider 7

| | |
|------------------------|--|
| Mobile service [QC1] | ALL WITH MOBILES [CODE 6 AT QA1a] |
| Landline service [QC2] | ALL WITH FIXED LANDLINE [CODES 1, 2, 3 OR 8 AT QA1a] |
| Internet service [QC3] | ALL WITH INTERNET SERVICES [CODES 1-6 AT QA1b] |

ASK FOR ALL SERVICES NEVER SWITCHED (CODE 7 AT QC1/QC2/QC3)

QC4/QC5/QC6. At any time in the last two years, have you considered switching your provider of each of the following services?

PLEASE SELECT A SINGLE RESPONSE. SINGLE CODE

- Yes, and actively started looking..... 1
- Yes, but did not start looking 2
- Considered switching, but more than two years ago 3
- Never considered switching 4

| | |
|------------------------|--|
| Mobile service [QC4] | ALL WITH MOBILES [CODE 6 AT QA1a] |
| Landline service [QC5] | ALL WITH FIXED LANDLINE [CODES 1, 2, 3 OR 8 AT QA1a] |
| Internet service [QC6] | ALL WITH INTERNET SERVICES [CODES 1-6 AT QA1b] |

ROUTING DEFINITIONS:

SWITCHERS = SWITCHED UP TO 2 YEARS AGO (CODES 1-4 AT QC1/QC2/QC3)

NON-SWITCHERS = NEVER SWITCHED (CODE 7 AT QC1/QC2/QC3)

NON-RECENT SWITCHERS = SWITCHED LONGER THAN 2 YEARS AGO (CODES 5 OR 6 AT QC1/QC2/QC3)

PAST CONSIDERERS = CONSIDERED SWITCHING IN PAST TWO YEARS BUT DECIDED NOT TO (CODE 1-2 AT QC4/QC5/QC6)

MOBILE

ASK ALL WITH MOBILES (CODE 6 AT QA1a)

QC7. The following are statements that businesses have made about switching **mobile phone** service providers. For each one please can you say how much you agree or disagree with it, using the following scale...

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

To what extent do you agree or disagree that...

PLEASE SELECT ONE RESPONSE FOR EACH. RANDOMISE ORDER. SINGLE CODE FOR EACH

- There is a good choice of providers available to my business
- There is a good choice of products and/or services available to my business
- It is difficult to make comparisons between providers on price
- It is difficult to make comparisons between providers on quality of service
- The prices of services are clear and transparent
- I am able to negotiate effectively with my provider on tariffs and services
- There is not much difference between the providers on the market
- I am aware I am able to transfer my existing number/s to a new provider
- It is difficult to make comparisons between providers because my service needs are complex
- I find price comparison sites useful to help me compare providers

ASK MOBILE NON-SWITCHERS AND NON-RECENT SWITCHERS

QC8. [NON-SWITCHERS Why have you never switched your mobile provider?] / [NON-RECENT SWITCHERS Why have you not switched your mobile provider in the last two years?]

PLEASE SELECT ALL THAT APPLY. RANDOMISE CODES 1-24. MULTICODE.

- Happy with my current provider
- There is not enough choice of providers available in our area
- Do not know how to switch providers
- Have never thought about switching providers
- Problems not sufficiently bad with current provider
- Already on the best deal
- Able to negotiate effectively with my current provider
- Don't want to have to change my mobile number/too much hassle to change phone number
- Didn't want to change provider for other services in the same bundle
- Hassle of needing to contact more than one provider to switch
- Too risky/ worried the switching process could go wrong
- Worried about arranging for services to start/stop at the same time
- Worried that might have to pay two providers at the same time
- Worried that other devices I own wouldn't work with a new service
- Worried about switching a number of services at once
- Would be worried I made the wrong choice

17. Bad experience switching comms services previously
18. Don't have time/have other priorities
19. Too difficult to compare the different tariffs /deals offered by each provider
20. No real difference between providers /they are all the same
21. Don't think we could save much money
22. Don't want to be tied into a new fixed term contract
23. We are tied into our existing contract and would incur a penalty charge
24. Did not want to lose content (programmes, apps, photos, data) stored on my device
25. Other (please type in)

ASK ALL MOBILE PAST CONSIDERERS AND SWITCHERS

QC9. [PAST CONSIDERERS What were your reasons for considering switching your mobile phone provider?][SWITCHERS What were your reasons for switching your mobile phone provider?]

PLEASE SELECT ALL THAT APPLY. MULTICODE. REVERSE ORDER OF CODES 1-17.

- | | |
|---|----|
| Cheaper deal available from new provider | 1 |
| New provider offered a package that fitted my needs better | 2 |
| New provider offered a better range of services | 3 |
| Better customer service offered by new provider | 4 |
| Better mobile coverage offered by new provider..... | 5 |
| Better mobile internet access offered by new provider | 6 |
| Better mobile call quality offered by new provider | 7 |
| Better service level agreements from new provider, e.g. faster response/repair times, guaranteed 24 hour contact etc. | 8 |
| For staff to benefit from promotions/ deals offered by new provider, e.g. free coffees, cinema tickets etc. | 9 |
| [PAST CONSIDERERS Current][SWITCHERS Previous] provider too expensive | 10 |
| Poor customer service from [PAST CONSIDERERS current] [SWITCHERS previous] provider..... | 11 |
| Poor mobile coverage from [PAST CONSIDERERS current] [SWITCHERS previous] provider..... | 12 |
| Poor mobile internet access from [PAST CONSIDERERS current] [SWITCHERS previous] provider..... | 13 |
| Poor call quality from [PAST CONSIDERERS current] [SWITCHERS previous] provider (e.g. calls dropped, don't connect, etc.) | 14 |
| Wanted to bundle my services | 15 |
| Was not intending switching my mobile provider but was offered a good deal as part of a bundle with another service | 16 |
| Contacted by another provider | 17 |
| Advertising from another provider made me look into it | 18 |
| Recommendation..... | 19 |
| Other (please type in) | 20 |
| Don't know/can't remember | 21 |

ASK ALL MOBILE SWITCHERS

QC10. When you switched your mobile provider, did you keep your mobile telephone number(s) or did you get a new number?

PLEASE SELECT ALL THAT APPLY. MULTICODE 1-2

- Kept old number(s)..... 1
- Got new number(s)..... 2
- Don't know/ can't recall 3

ASK ALL MOBILE SWITCHERS

QC11. Which, if any, of the following did you experience difficulty with when switching your mobile phone provider?

FOR ONLINE SPLIT RESPONSES ACROSS TWO SCREENS AS PER SEPARATE DOCUMENT AND SHOW THE FOLLOWING TEXT FOR THE SECOND SCREEN: The following are some more possible difficulties. Which, if any, of these did you experience difficulty with when switching your mobile phone provider?

PLEASE SELECT ALL THAT APPLY. MULTI-CODE. RANDOMISE 2-25.

- No problems experienced 1
- Paying charges for early termination of contract 2
- Getting a PAC / STAC from existing provider 3
- Keeping/transferring telephone number/s 4
- Switching more than one mobile device at a time 5
- Transferring email across to new service 6
- Understanding the relevant steps required to switch provider 7
- Arranging the switch so that you were not paying for your old and new services at the same time 8
- Cancelling your previous service 9
- Process took longer than expected 10
- Previous provider sending bills for cancelled service 11
- Technical issues 12
- Arranging start and stop dates 13
- Arranging the switch so that you always had access to your services 14
- Existing provider tried to persuade you to stay 15
- Existing provider cancelled the switching process 16
- Charged wrong amount by new provider 17
- Delay in receiving new equipment 18
- Obtaining information on switching from previous provider 19
- Setting up a new online account 20
- Unlocking a handset 21
- Other devices not working with the new service 22
- Finding time to research the market 23
- Moving content from one cloud storage to another 24
- Contacting your new provider 25
- Other (please type in) 26

END OF MOBILE SECTION

LANDLINE

ASK ALL WITH LANDLINE SERVICES (CODES 1, 2, 3 OR 8 AT QA1a)

QC12. The following are statements that businesses have made about switching **landline** service providers. For each one please can you say how much you agree or disagree with it, using the following scale...

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

To what extent do you agree or disagree that...

PLEASE SELECT ONE RESPONSE FOR EACH. RANDOMISE ORDER. SINGLE CODE FOR EACH

- There is a good choice of providers available to my business
- There is a good choice of products and/or services available to my business
- It is difficult to make comparisons between providers on price
- It is difficult to make comparisons between providers on quality of service
- The prices of services are clear and transparent
- I am able to negotiate effectively with my provider on tariffs and services
- There is not much difference between the providers on the market
- I am aware I am able to transfer my existing number/s to a new provider
- It is difficult to make comparisons between providers because my service needs are complex
- I find price comparison sites useful to help me compare providers

ASK LANDLINE NON-SWITCHERS AND NON-RECENT SWITCHERS

QC13. [NON-SWITCHERS Why have you never switched your landline provider?] / [NON-RECENT SWITCHERS Why have you not switched your landline provider in the last two years?]

PLEASE SELECT ALL THAT APPLY. RANDOMISE CODES 1-24. MULTICODE.

- Happy with my current provider
- There is not enough choice of providers available in our area
- Do not know how to switch providers
- Have never thought about switching providers
- Problems not sufficiently bad with current provider
- Already on the best deal
- Able to negotiate effectively with my current provider
- Don't want to have to change my phone number/too much hassle to change phone number
- Hassle of needing to contact more than one provider to switch
- Didn't want to change provider for other services in the same bundle
- Too risky/ worried the switching process could go wrong
- Worried about arranging for services to start/stop at the same time
- Worried that might have to pay two providers at the same time
- Worried that other devices I own wouldn't work with a new service
- Would be worried I made the wrong choice

16. Bad experience switching comms services previously
17. Don't have time/have other priorities
18. Too difficult to compare the different tariffs /deals offered by each provider
19. No real difference between providers /they are all the same
20. Don't think we could save much money
21. Don't want to be tied into a new fixed term contract
22. We are tied into our existing contract and would incur a penalty charge
23. Other (please type in)

ASK ALL LANDLINE PAST CONSIDERERS AND SWITCHERS

QC14. [PAST CONSIDERERS What were your reasons for considering switching your landline service provider?][SWITCHERS What were your reasons for switching your landline service provider?]

PLEASE SELECT ALL THAT APPLY. MULTICODE. REVERSE ORDER OF CODES 1-16.

- | | |
|---|----|
| Cheaper deal available from new provider | 1 |
| New provider offered a package that fitted my needs better | 2 |
| New provider offered a better range of services | 3 |
| Better customer service offered by new provider | 4 |
| Better service reliability offered by new provider..... | 5 |
| Better call quality offered by new provider | 6 |
| Better service level agreements from new provider, e.g. faster response/repair times, guaranteed 24 hour contact etc. | 7 |
| [PAST CONSIDERERS Current][SWITCHERS Previous] provider too expensive | 8 |
| Poor customer service from [PAST CONSIDERERS current] [SWITCHERS previous] provider..... | 9 |
| Poor service reliability from [PAST CONSIDERERS current] [SWITCHERS previous] provider..... | 10 |
| Poor call quality from [PAST CONSIDERERS current] [SWITCHERS previous] provider (e.g. calls dropped, don't connect, etc.) | 11 |
| Wanted to bundle my services | 12 |
| Was not intending switching my landline provider but was offered a good deal as part of a bundle with another service | 13 |
| Contacted by another provider | 14 |
| Advertising from another provider made me look into it | 15 |
| Recommendation..... | 16 |
| Other (please type in) | 17 |
| Don't know/can't remember | 18 |

ASK ALL LANDLINE SWITCHERS

QC15. Which, if any, of the following did you experience difficulty with when switching your landline service provider?

FOR ONLINE SPLIT RESPONSES ACROSS TWO SCREENS AS PER SEPARATE DOCUMENT AND SHOW THE FOLLOWING TEXT FOR THE SECOND SCREEN: The following are some more possible difficulties. Which, if any, of these did you experience difficulty with when switching your landline service provider?

PLEASE SELECT ALL THAT APPLY. MULTI-CODE. RANDOMISE 2-21.

- No problems experienced 1
- Paying charges for early termination of contract 2
- Keeping/transferring telephone number/s 3
- Understanding the relevant steps required to switch provider 4
- Arranging the switch so that you were not paying for your old and new services at the same time 5
- Cancelling your previous service 6
- Process took longer than expected 7
- Previous provider sending bills for cancelled service 8
- Technical issues (e.g. installation issues) 9
- Arranging start and stop dates 10
- Arranging the switch so that you always had access to your services 11
- Existing provider tried to persuade you to stay 12
- Existing provider cancelled the switching process 13
- Charged wrong amount by new provider 14
- Delay in receiving new equipment 15
- Obtaining information on switching from previous provider 16
- Setting up a new online account 17
- Other devices not working with the new service 18
- Finding time to research the market 19
- Paying start up fees to new provider 20
- Returning previous provider's equipment 21
- Contacting your new provider 22
- Other (please type in) 23

END OF LANDLINE SECTION

INTERNET

ASK ALL WITH INTERNET SERVICES (CODES 1-6 AT QA1b)

QC16. The following are statements that businesses have made about switching **internet** service providers. For each one please can you say how much you agree or disagree with it, using the following scale...

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

To what extent do you agree or disagree that...

PLEASE SELECT ONE RESPONSE FOR EACH.RANDOMISE ORDER. SINGLE CODE FOR EACH

- There is a good choice of providers available to my business
- There is a good choice of products and/or services available to my business
- It is difficult to make comparisons between providers on price
- It is difficult to make comparisons between providers on quality of service
- The prices of services are clear and transparent
- I am able to negotiate effectively with my provider on tariffs and services
- There is not much difference between the providers on the market
- It is difficult to make comparisons between providers because my service needs are complex
- I find price comparison sites useful to help me compare providers

ASK INTERNET NON-SWITCHERS AND NON-RECENT SWITCHERS

QC17. [NON-SWITCHERS Why have you never switched your internet service provider?] / [NON-RECENT SWITCHERS Why have you not switched your internet service provider in the last two years?]

PLEASE SELECT ALL THAT APPLY. RANDOMISE CODES 1-24. MULTICODE.

- Happy with my current provider
- There is not enough choice of providers available in our area
- There is not enough choice of products or service available to my organization
- Do not know how to switch providers
- Have never thought about switching providers
- Problems not sufficiently bad with current provider
- Already on the best deal
- Able to negotiate effectively with my current provider
- Too risky/ worried the switching process could go wrong
- Hassle of needing to contact more than one provider to switch
- Didn't want to change provider for other services in the same bundle
- Worried about arranging for services to start/stop at the same time
- Worried that might have to pay two providers at the same time
- Worried that other devices I own wouldn't work with a new service
- Would be worried I made the wrong choice
- Bad experience switching comms services previously
- Don't have time/have other priorities

18. Too difficult to compare the different tariffs /deals offered by each provider
19. No real difference between providers /they are all the same
20. Don't think we could save much money
21. Don't want to be tied into a new fixed term contract
22. Did not want to have to get an engineer to install new equipment
23. We are tied into our existing contract and would incur a penalty charge
24. Other (please type in)

ASK ALL INTERNET PAST CONSIDERERS AND SWITCHERS

QC18. [PAST CONSIDERERS What were your reasons for considering switching your internet service provider?][SWITCHERS What were your reasons for switching your internet service provider?]

PLEASE SELECT ALL THAT APPLY. MULTICODE. REVERSE ORDER OF CODES 1-17.

- | | |
|---|----|
| Cheaper deal available from new provider | 1 |
| new provider offered a package that fitted my needs better | 2 |
| New provider offered a better range of services | 3 |
| Better customer service offered by new provider | 4 |
| Better service reliability offered by new provider..... | 5 |
| Better service level agreements from new provider, e.g. faster response/repair times, guaranteed 24 hour contact etc. | 6 |
| Faster connection speed offered by new provider..... | 7 |
| Faster upload/download speeds | 8 |
| [PAST CONSIDERERS Current][SWITCHERS Previous] provider too expensive | 8 |
| Poor customer service from [PAST CONSIDERERS current] [SWITCHERS previous] provider..... | 9 |
| Poor service reliability from [PAST CONSIDERERS current] [SWITCHERS previous] provider..... | 10 |
| Slow connection speed from [PAST CONSIDERERS current] [SWITCHERS previous] provider | 11 |
| Wanted to bundle my services | 13 |
| Was not intending switching my internet provider but was offered a good deal as part of a bundle with another service | 14 |
| Contacted by another provider | 15 |
| Recommendation..... | 16 |
| Advertising from another provider made me look into it.... | 17 |
| Other (please type in) | 18 |
| Don't know/can't remember..... | 19 |

ASK ALL INTERNET SWITCHERS

QC19. Which, if any, of the following did you experience any difficulties with when switching your internet service provider?

FOR ONLINE SPLIT RESPONSES ACROSS TWO SCREENS AS PER SEPARATE DOCUMENT AND SHOW THE FOLLOWING TEXT FOR THE SECOND SCREEN: The following are some more possible difficulties. Which, if any, of these did you experience difficulty with when switching your internet service provider?

PLEASE SELECT ALL THAT APPLY. MULTI-CODE. RANDOMISE CODES 2-23.

- No problems experienced 1
- Paying charges for early termination of contract 2
- Difficulty getting a MAC from existing provider 3
- Transferring email to new service 4
- Understanding the relevant steps required to switch provider 5
- Arranging the switch so that you were not paying for your old and new services at the same time 6
- Cancelling your previous service 7
- Process took longer than expected 8
- Previous provider sending bills for cancelled service 9
- Technical issues (e.g. installation issues)10
- Arranging start and stop dates11
- Arranging the switch so that you always had access to your services12
- Existing provider tried to persuade you to stay13
- Existing provider cancelled the switching process14
- Charged wrong amount by new provider15
- Delay in receiving new equipment16
- Obtaining information on switching from previous provider 17
- Setting up a new online account18
- Other devices not working with the new service19
- Finding time to research the market20
- Paying start up fees to new provider21
- Returning previous provider's equipment22
- Contacting your new provider23
- Other (please type in)24

ASK ALL WITH INTERNET SERVICES (CODES 1-6 AT QA1b)

QC20. Please imagine you are choosing a new internet provider. For each factor, please can you say whether it would be a top priority, a medium priority or a lower priority for you?

PLEASE SELECT ONE RESPONSE FOR EACH. SINGLE CODE FOR EACH. RANDOMISE.

Is there anything else you would consider and if so, what level of priority would that have?

| | Top | Medium | Lower |
|---|-----|--------|-------|
| The reliability of the service | 1 | 2 | 3 |
| The cost of the service | 1 | 2 | 3 |
| Download speed | 1 | 2 | 3 |
| Upload speed | 1 | 2 | 3 |
| Customer service / support from the provider | 1 | 2 | 3 |
| The service level agreement (SLA) offered by the provider | 1 | 2 | 3 |
| The reputation of the provider | 1 | 2 | 3 |
| The provider being well known / having many users | 1 | 2 | 3 |
| Other (please type in) | 1 | 2 | 3 |

END OF INTERNET SECTION

SECTION D: CONTRACTS

The following are a few questions about your contracts for your business communications services.

ASK ALL

QD1 Please can you say how much you agree or disagree with the following statements about your **[INSERT SERVICES USED mobile, landline and internet]** contract/s.

PLEASE SELECT ONE RESPONSE FOR EACH. RANDOMISE ORDER. SINGLE CODE FOR EACH

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

- a) I am aware of the key terms and conditions of the contract (including charges due on early termination of the service)
- c) I find that my contract terms and conditions are clear and easily understood
- d) I am able to access the terms of my contract easily (either because they were sent in a written format or are available online)
- e) It would be helpful to have all key terms presented as an upfront summary within a contract
- f) I always read the Terms and Conditions of my communication contracts
- j) I have experienced negative consequences as a result of terms and conditions I was unaware of (such as receiving a financial penalty, price increases, being tied into a contract for longer than expected or being charged for doing something such as leaving the contract early)

ASK ALL

QD2/QD3/QD4. For each of your communications services, does your organisation have a specific business contract or do you just use an ordinary personal/residential service, or do you have both?

- Personal / residential contract/s only 1
- Business contract/s only 2
- Both business and personal / residential contracts..... 3
- Don't know 4

PLEASE SELECT ONE RESPONSE FOR EACH. SINGLE CODE FOR EACH

| | |
|------------------------|--|
| Mobile service [QD2] | ALL WITH MOBILES [CODE 6 AT QA1a] |
| Landline service [QD3] | ALL WITH FIXED LANDLINE [CODES 1, 2, 3 OR 8 AT QA1a] |
| Internet service [QD4] | ALL WITH INTERNET SERVICES [CODES 1-6 AT QA1b] |

ASK ALL WHO DO NOT HAVE A BUSINESS CONTRACT FOR [SERVICE AT QD2=1/QD3=1/QD4=1]
QD5. Why have you chosen not to have a business service for your (INSERT SERVICE) service?

PLEASE SELECT ALL THAT APPLY. MULTICODE. RANDOMISE CODES 1-7

- Never thought about it/considered it..... 1
- Business contracts are more expensive/
personal contracts are cheaper..... 2
- Personal contract is fine for my business 3
- My business needs more than a residential package, but
even the smallest/cheapest business packages available
offer higher levels of service (bandwidth/capacity) than
my business needs..... 4
- Better/faster service available on a personal contract
than on a business one 5
- Haven't got round to switching to a business contract 6
- Wasn't aware business contracts can be beneficial (such
as providing enhanced service provision and better
levels of customer service) 7
- Other (please type in)98
- Don't know99

ASK ALL WITH A MOBILE SERVICE [CODE 6 AT QA1a]

QD6a. In the last 12 months, have you taken any action as a result of receiving a notification about the status of your contract for your mobile service?

TEXT FOR THOSE WHO SWITCHED MOBILE SERVICE IN LAST 12 MONTHS AT QC1 (CODE 1-2 FOR MOBILE) This notification could have been from your previous provider before you switched to your new provider.

This may have been in the form of a letter, email or text and would tell you either that you are out of contract or coming towards the end of your contract and may be able to get a better tariff elsewhere.

PLEASE SELECT ALL THAT APPLY. MULTICODE CODES 2-8.

- Have not received a notification about the status of
my contract (SINGLE CODE)..... 1
- Looked into deals with my existing provider at that time... 2
- Looked into deals with alternative provider/s 3
- Contacted my existing provider at that time 4
- Contacted alternative provider/s 5
- Signed up for a contract with my existing provider at
that time.....6
- Signed up for a contract with an alternative provider 7
- Something else (please type in) 8
- I received a notification, but I did not take any action
(SINGLE CODE) 9
- Received a notification but can't remember whether I took
any action (SINGLE CODE).....10
- Can't remember whether or not I received a notification (SINGLE CODE)....11

**ASK ALL WITH FIXED LANDLINE [CODES 1, 2, 3 OR 8 AT QA1a] AND/OR INTERNET SERVICES
[CODES 1-6 AT QA1b]**

QD6b. In the last 12 months, have you taken any action as a result of receiving a notification about the status of your contract for your [IF LANDLINE ONLY landline service][IF INTERNET ONLY internet service][IF LANDLINE AND INTERNET landline or internet services]?

TEXT FOR THOSE WHO SWITCHED ANY SERVICE IN LAST 12 MONTHS AT QC2/QC3 (CODE 1-2 FOR EITHER) This notification could have been from your previous provider before you switched to your new provider.

This may have been in the form of a letter, email or text and would tell you either that you are out of contract or coming towards the end of your contract and may be able to get a better tariff elsewhere.

PLEASE SELECT ALL THAT APPLY. MULTICODE CODES 2-8.

- Have not received a notification about the status of my contract (SINGLE CODE)..... 1
- Looked into deals with my existing provider at that time... 2
- Looked into deals with alternative provider/s 3
- Contacted my existing provider at that time 4
- Contacted alternative provider/s 5
- Signed up for a contract with my existing provider at that time..... 6
- Signed up for a contract with an alternative provider 7
- Something else (please type in) 8
- I received a notification, but I did not take any action (SINGLE CODE) 9
- Received a notification but can't remember whether I took any action (SINGLE CODE).....10
- Can't remember whether or not I received a notification (SINGLE CODE)11

SECTION N: NET NEUTRALITY

The next couple of questions are about the principle of net neutrality.

Introduce Net Neutrality:

Net neutrality is the principle that all internet traffic should be treated equally. There are net neutrality rules, designed to ensure that end users of communications services, including business customers, can access and distribute the information and content they want, when and where they want to via the terminal equipment (e.g. mobile handsets, routers, dongles and other equipment), of their choice.

The principle of net neutrality is based on ensuring that users of the internet can control what they see and do online - not the internet service provider (ISP) that connects them to the internet.

At present the net neutrality rules allow internet service providers a limited amount of control over the management of internet traffic, for example slowing down the delivery of content when the network is busy or coordinating with software providers to ensure the timing of the release of major software updates are scheduled so they do not coincide with each other.

ASK ALL

QN1 There are various types of content that you may find it valuable to your business to either prioritise or block access to. Please imagine that this was possible to do and for each of the following types of content or activity, please indicate whether you would like to be able to prioritise it over other services, block it or do not feel strongly either way.

PLEASE SELECT ONE RESPONSE FOR EACH. RANDOMISE ORDER. SINGLE CODE FOR EACH ACTIVITY TYPE

| | Prioritise | Block | Access, but not prioritise | Do not use |
|--|------------|-------|----------------------------|------------|
| Email | 1 | 2 | 3 | 4 |
| Online banking | 1 | 2 | 3 | 4 |
| Online advertising | 1 | 2 | 3 | 4 |
| Other online marketing (i.e. marketing via email, Facebook or Twitter) | 1 | 2 | 3 | 4 |

| | | | | |
|---|---|---|---|---|
| VoIP (i.e. making calls over the internet using services such as Skype) | 1 | 2 | 3 | 4 |
| Paying for goods and services via BACS | 1 | 2 | 3 | 4 |
| Ordering goods and services online | 1 | 2 | 3 | 4 |
| Taking orders for goods and services online | 1 | 2 | 3 | 4 |
| Taking payment for goods and services online | 1 | 2 | 3 | 4 |
| Using HMRC services (e.g. submitting PAYE information, VAT and company tax returns) | 1 | 2 | 3 | 4 |
| Using bespoke software or applications (e.g. accountancy packages) | 1 | 2 | 3 | 4 |
| File Transfer Protocol or FTP | 1 | 2 | 3 | 4 |
| Online data storage or back-up | 1 | 2 | 3 | 4 |
| Online video conferencing | 1 | 2 | 3 | 4 |
| Gaming websites | 1 | 2 | 3 | 4 |
| Adult websites | 1 | 2 | 3 | 4 |
| Shopping websites | 1 | 2 | 3 | 4 |
| Music videos | 1 | 2 | 3 | 4 |
| Links to possible fraudulent/ scam websites | 1 | 2 | 3 | 4 |
| Money mining/ trading websites (e.g. Bitcoin) | 1 | 2 | 3 | 4 |
| Anything else (please type in) | 1 | 2 | 3 | 4 |

ASK ALL

QN2 Again, assuming it was possible to specify which types of sites/ content could be prioritised or blocked, which of the following methods of control would you prefer to have available from your Internet Service Provider (ISP)?

PLEASE SELECT A SINGLE RESPONSE. SINGLE CODE.

1. To do this yourself using software provided by your ISP
2. To select the websites/content yourself and then request your ISP to prioritise or block them for you
3. To choose from a list provided by your ISP of websites/content, who will then prioritise or block them for you
4. Your ISP to automatically prioritise or block websites/content using its own criteria
5. Would not want to prioritise or block any content
6. Don't know/not sure

PROFILE: COMPANY AND INDIVIDUAL

Finally we have a few quick questions about your organisation for classification purposes.

ASK ALL

- P1. Which of the following ranges comes closest to your organisation's total annual spend on landline, mobile and internet services (including email, web access and any related data services).

Please exclude anything you spend on hardware or external support

IF 2+ SITES AT S6: Please think about your total spend across all sites within the UK.

PLEASE SELECT A SINGLE RESPONSE. SINGLE CODE

| | |
|------------------------------------|---|
| Less than £500 | 1 |
| £500-£999 | 2 |
| £1,000-£1,999..... | 3 |
| £2,000-£4,999..... | 4 |
| £5,000-£9,999..... | 5 |
| £10,000 or more | 6 |
| Don't know/prefer not to say | 7 |

ASK ALL

- P2. FOR PRIVATE SECTOR (codes 1-3 at S1) ASK: Which of the following ranges comes closest to your organisation's annual turnover for the last financial year (2020/21)?

FOR PUBLIC AND THIRD SECTOR (codes 4-8 at S1) ASK: Which of the following ranges comes closest to the budget you had available for the last financial year (2020/2021)?

PLEASE SELECT A SINGLE RESPONSE. SINGLE CODE

| | |
|------------------------------------|----|
| Under £50,000..... | 1 |
| £50,000-£75,000 | 2 |
| Over £75,000 - £100,000..... | 3 |
| Over £100,000-£250,000 | 4 |
| Over £250,000 - £500,000 | 5 |
| Over £500,000-£1 million..... | 6 |
| Over £1m-£5m..... | 7 |
| Over £5m-£10m | 8 |
| Over £10m | 9 |
| Don't know prefer not to say | 10 |

ASK ALL

- P3 Is your business VAT registered?

PLEASE SELECT A SINGLE RESPONSE. SINGLE CODE

| | |
|----------------|---|
| Yes | 1 |
| No | 2 |
| Not sure | 3 |

ASK ALL

P4. IF SOLE TRADER ASK: Which of the following do you do on a regular basis, i.e. once a month or more often?

IF 2+ EMPLOYEES ASK: Which of the following do your organisation's employees do on a regular basis, i.e. as a regular arrangement as part of their normal working pattern, not just occasionally?

PLEASE SELECT ALL THAT APPLY. RANDOMISE ORDER. MULTICODE.

1. Work from home
2. Work out of the office in other specific locations/offices/buildings
3. Work while travelling domestically (i.e. within the UK)
4. Work while travelling internationally
5. Work in sparsely populated areas in the countryside
6. None of these

ASK ALL

P5. Are your customers or clients...?

PLEASE SELECT ALL THAT APPLY. CODES 3 AND 4 CAN BE CODED TOGETHER.
OTHER THAN THAT, SINGLE CODE

- | | |
|--------------------------------------|---|
| Mainly based in your local area..... | 1 |
| Mainly based in your region | 2 |
| Spread across the UK..... | 3 |
| Spread across other countries | 4 |
| Don't know..... | 5 |

ONLY ASK TO PRIVATE SECTOR S1(1-3)

P6. And are your customers...?

PLEASE SELECT A SINGLE RESPONSE. SINGLE CODE

- | | |
|--|---|
| Mainly other businesses..... | 1 |
| Mainly consumers | 2 |
| A mix of businesses and consumers..... | 3 |
| Don't know..... | 4 |

ASK IF MULTIPLE SITES (S6 = Codes 2 - 7). OTHERS SKIP TO P8

P7. Are your sites...?

PLEASE SELECT A SINGLE RESPONSE. SINGLE CODE

- Mainly based in towns and cities 1
- Mainly based in industrial sites or business parks outside towns and cities 2
- Mainly based in rural areas..... 3
- Spread across a mix of urban, suburban and rural areas.. 4
- Don't know..... 5

ASK IF SINGLE SITE (S6 = Code 1) OTHERS SKIP TO P9

P8. Is your business based...

PLEASE SELECT A SINGLE RESPONSE. SINGLE CODE

- At your home address in a town or city (IF CODE 1 AT S7) 1
- At your home address in a village or other rural location (IF CODE 1 AT S7) 2
- At commercial premises in a town or city (NOT CODE 1 AT S7) 3
- At a commercial premises in a village or other rural location (NOT CODE 1 AT S7) 4
- On an industrial estate or business park in a town or city (NOT CODE 1 AT S7) 5
- On an industrial estate or business park in a village or other rural location (NOT CODE 1 AT S7) 6
- Don't know..... 7

ASK IF BASED ON AN INDUSTRIAL SITE OR BUSINESS PARK (P7 = code 2 OR P8 = codes 5 or 6) OTHERS SKIP TO P11

P9. How long have you been based on an industrial estate or business park?

PLEASE SELECT A SINGLE RESPONSE. SINGLE CODE

- Less than one year..... 1
- Between one and five years..... 2
- Between six and ten years 3
- Longer than ten years..... 4
- Don't know..... 5

ASK IF BASED ON AN INDUSTRIAL SITE OR BUSINESS PARK (P7 = code 2 OR P8 = codes 5 or 6)

P10. Do you have to buy any of your communication services from a provider or providers chosen by the site owner or landlord or are you able to choose which providers you use?

If yes, is that for landline, internet or both?

PLEASE SELECT ALL THAT APPLY. SINGLE CODE 3&4

- Yes, I have no choice of landline provider.....1
- Yes, I have no choice of internet provider2
- No, I am able to choose my own provider3
- Don't know.....4

ASK ALL

P11. Has your business ever wanted to move to a different location but not been able to due to the communications services your business requires not being available in the chosen location? If yes, which services were not available?

PLEASE SELECT ALL THAT APPLY. MULTICODE.

- Yes - standard PSTN telephone lines1
- Yes - ADSL broadband2
- Yes - Fibre/superfast Broadband provided using a cable network [nearly always provided by Virgin Media, provided by WightFibre in the Isle of Wight]3
- Yes - Fibre/superfast Broadband provided using the traditional copper network - Fibre to the Cabinet (FTTC).....4
- Yes - "Full-fibre"/Fibre/superfast Broadband using new fibre networks - Fibre to the Premises (FTTP)5
- Yes - Fibre/superfast broadband, but not sure which type 6
- Yes - ISDN 2 / 2e lines7
- Yes - ISDN 30 lines8
- Yes - mobile signal.....9
- Yes - other (please type in) 10
- No (SINGLE CODE) 11
- Don't know (SINGLE CODE)..... 12

ASK ALL

P12. Thank you for taking part in this survey today. As a result of this survey, Ofcom may be interested in finding out more about particular issues that businesses experience with their communications services. Would you be willing to be contacted again by a research agency working on behalf of Ofcom to participate in further research on this subject?

[SINGLE CODE]

- Yes - would be willing.....1
- No - would not be willing.....2

[IF YES]

Name.....

Contact No (MOBILE)

.....

Contact No (LANDLINE)

.....

E-mail address

THANK AND CLOSE