



Large Business Use of Telecoms Services: Research Report 2006

Research Document

Publication date: 18 October 2006

Contents

Section		Page
1	Introduction	2
2	Fixed line services	5
3	Mobile services	13
4	Advanced data services	21
5	Other areas of interest	29

Annex		Page
2	Methodology	31
3	Questionnaire	32

Section 1

Introduction

1.1 Background to the research

This report supports Ofcom's work to monitor and understand large businesses and their use of and experience of telecoms services.

Latest figures from the Office for National Statistics show that there are 7,700 large businesses in the UK¹ defined as businesses with 250 employees or more. These businesses form an important part of the UK economy. Telecommunications plays a vital role in supporting and enabling these businesses to function and develop.

Ofcom has a statutory duty to further the interests of UK businesses and aims to provide best-in-class research to which stakeholders have regular access.

This research aims to show how the large business community in the UK uses fixed line telecoms, mobile telecoms and advanced data services. The report also provides evidence of their experiences of these services.

In particular the research focuses upon:

- actual switching behaviour and views on the ease/difficulties of switching,
- satisfaction with overall service, value for money, customer service/account management and the range of services and suppliers available,
- views on how easy or difficult it is to make comparisons between suppliers when making purchasing decisions, and
- opinions on whether or not particular aspects of the markets have improved or deteriorated over the past year.

1.2 Methodological approach

Research amongst large business users presents certain practical challenges:

Firstly, there is a relatively *small universe* of large businesses available for interviewing. In total in the UK there are only 7,700 large businesses.

Additionally, many different organisations are interested in the views and experiences of this important but relatively small group of large businesses. This results in a high demand of requests to participate in research; especially in the area of communications technologies.

To address this Ofcom established a panel of large business representatives in 2005². Maintaining this panel allows Ofcom to contact representatives within large businesses who are willing to take part in research.

¹ Data supplied by ONS Data Analysis Service on 2005 figures for VAT based enterprises

² This panel has since been up-dated and refreshed in 2006.

This research was carried out using Ofcom's large business panel via an on-line survey. Interviews were carried out in May and June 2006 and a total of 147 interviews were completed with people who had responsibility for telecoms decision making within large businesses.

In research 147 respondents may not constitute a large sample, however, given that there are 7,700 large businesses in the UK, 147 respondents equates to 2 percent of the total large business population. Ofcom therefore considers this a suitable sample for research with large businesses. With this number of respondents Ofcom calculates the margin for possible error to be 7.5 percent: That is to say that if 50% of the sample say they are satisfied with a service, the actual figure may lie anywhere between 42 percent and 58 percent.

Responses were weighted by company size based on data supplied by the Office for National Statistics³.

1.3 Summary of key findings

Switching

Just over half of large businesses say they have switched suppliers in the last 3 years across fixed line, mobile services and advanced data services, but the process of switching is not always straightforward, particularly for advanced data services:

- 53% claimed to have switched supplier for fixed line phone services and the same proportion have switched mobile services in the last 3 years. Some 55% say they have switched advanced data services in the same time period.
- 60% of those who switched fixed line phone services said they found the process easy, compared to 30% who found it difficult. When switching mobile services, 43% found this easy and 33% had some difficulty. Around 32% found switching advanced services easy and 37% found this difficult.

Satisfaction

Large businesses are generally satisfied with fixed line and mobile services, but satisfaction with advanced data services was shown to be less:

- 73% of companies were satisfied with fixed line *services overall*. The same number were overall satisfied with their mobile services. This is compared to 44% of companies who were overall satisfied with advanced data services.
- 60% of companies were satisfied with the *quality of customer service or account management* with their fixed line services, 68% were satisfied with this on their mobile services compared to 43% of companies who were satisfied with this on their advanced data services.
- 64% of companies were satisfied with *value for money* on fixed line services, 61% were satisfied with this aspect of their mobile services compared to 38% of companies who were satisfied with this for their advanced data services.

³ Data supplied by ONS Data Analysis Service on 2005 figures for VAT based enterprises

- 62% of companies were satisfied with the *range of relevant or appropriate services and suppliers* for fixed line services, 71% were satisfied with this for mobile services, whilst 41% of companies were satisfied with this aspect of advanced data services.

Comparisons between suppliers

The research indicates that large businesses do not necessarily find it easy to *compare* the costs of different suppliers:

- 44% found it easy and 38% found it difficult to compare the costs of fixed line suppliers, whilst for mobile services 44% found it easy and 40% found it difficult. For advanced data services 29% found it easy and 26% found it difficult.

Large businesses also reported some difficulties comparing the *overall quality of suppliers*:

- For fixed line 28% said they found it easy whilst a higher proportion (53%) found it difficult to make this comparison. When thinking about mobile services 29% found it easy and 48% found it difficult. With advanced data services 22% found it easy and 41% found it difficult to compare the overall quality of different suppliers.

Changes over the last year

When considering any changes that have taken place over the last year, large businesses generally reported that *choice of suppliers* had improved across fixed line, mobiles and advanced data services. Around a third of respondents felt there had been an improvement compared to around one in ten who felt that choice had got worse.

Large businesses gave the most positive feedback on changes in the *overall quality of service* on mobile services; 40% said they thought this had improved whilst 7% said this had become worse. In comparison 23% of businesses felt that quality of service overall of fixed line services had improved, with 10% of the view it had got worse. The figures were very similar for advanced data services; 22% indicated improvements whilst 10% suggested that this had become worse.

There was little indication that quality of *customer service or account management* had improved for both fixed lines and advanced data services with roughly equal numbers saying it had improved and worsened. However, 33% of those with mobile services saw this aspect of the services as having improved compared to 16% who commented that this had got worse.

1.4 Structure of the report

The report outlines the findings of the research with large businesses and covers the different services in separate sections.

Section 2 looks at the experiences and views of large businesses relating to fixed line services, section 3 focuses on mobile services and section 4 contains the research data and detail on advanced data services.

The final section looks at internet telephony, account management and any other general issues raised by large businesses about developments in service provision over the last year.

Section 2

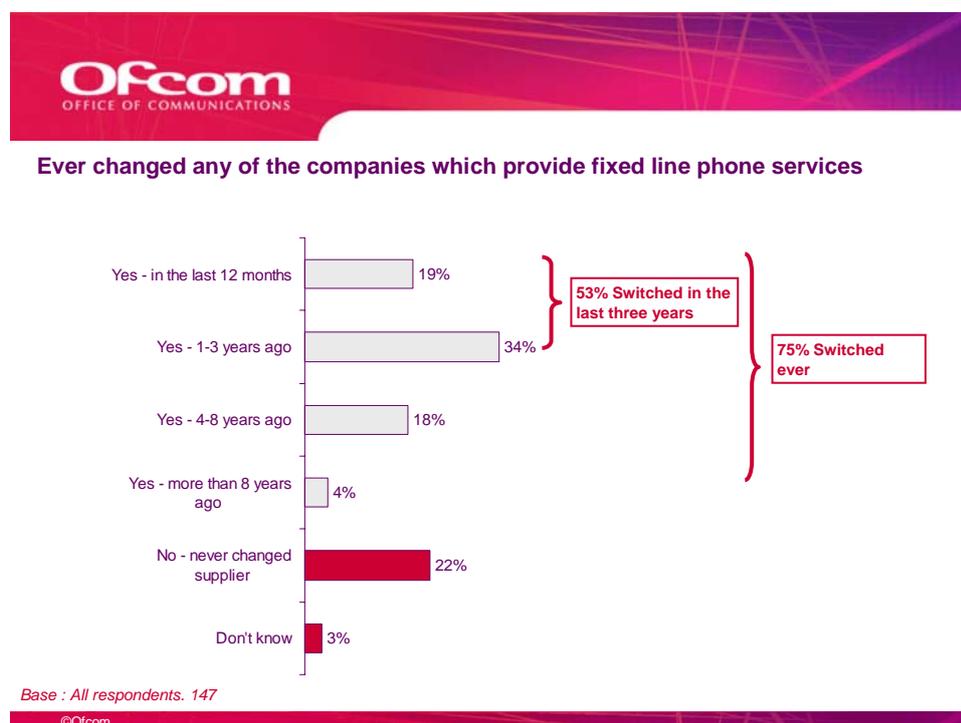
Fixed line services

2.1 Switching

Over half of large businesses have changed fixed line supplier in the last three years and three fifths said it was easy to change suppliers

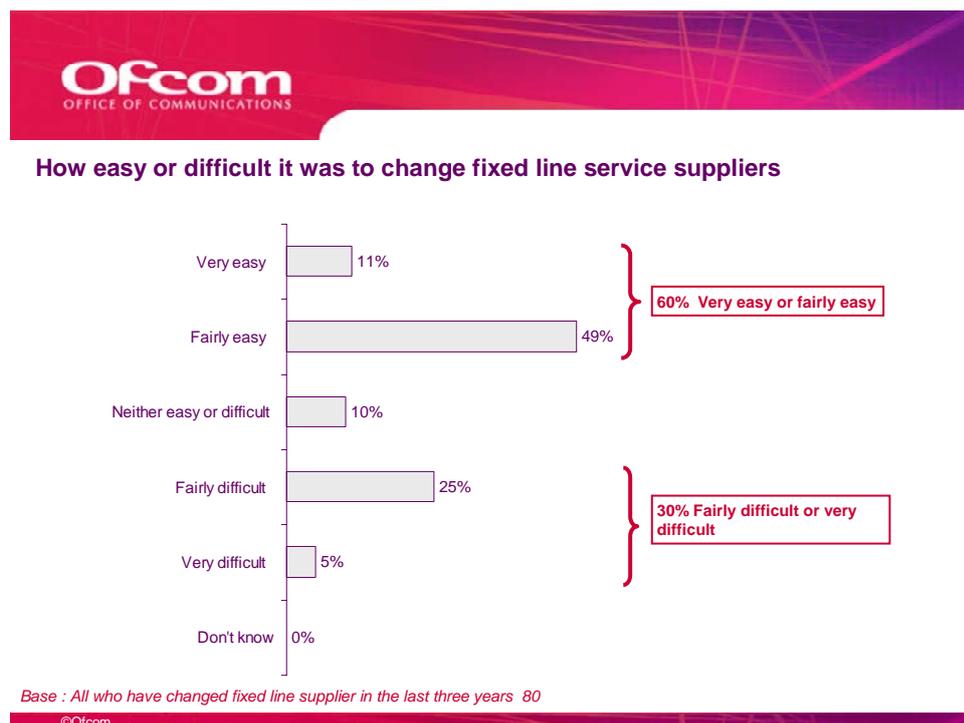
All large businesses interviewed claimed to make use of fixed lines. Over half of all respondents (53%) said they have changed their supplier in the last three years, with nearly a fifth (19%) having done so in the last 12 months (see Figure 1).

Figure 1



Of those who have changed suppliers within the last three years, three fifths (60%) said it was easy to change fixed line suppliers, with just over 1 in 10 (11%) saying it was very easy (see Figure 2). 30% found this process difficult to some degree.

Figure 2



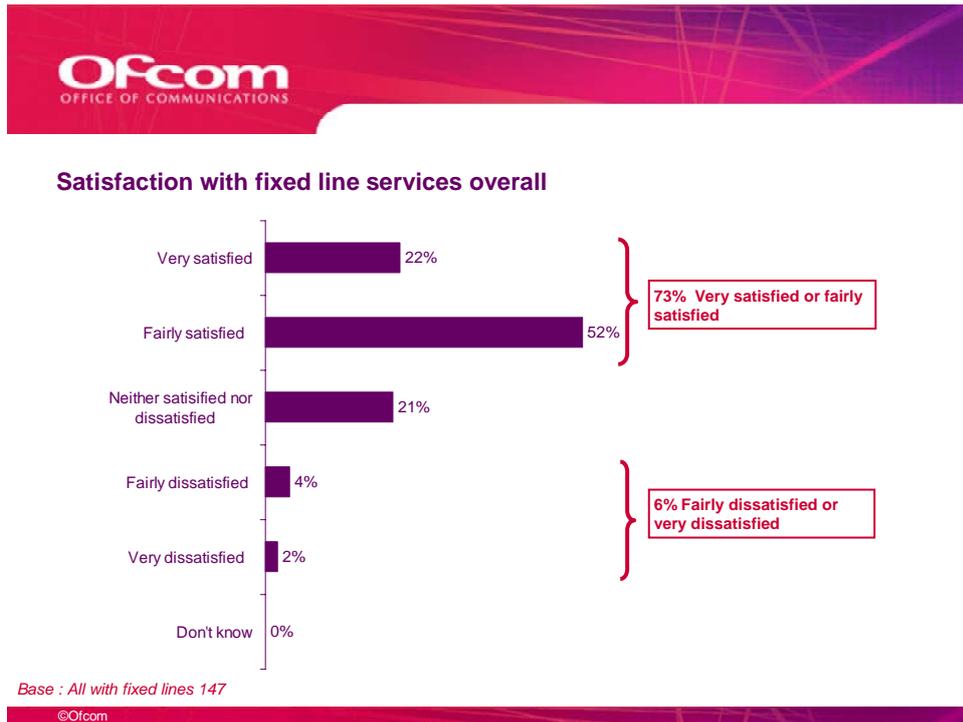
2.2 Satisfaction with service and value

The majority were satisfied with fixed line services overall, the customer service/account management and overall value for money of fixed line services

Respondents with fixed lines were also asked about their satisfaction on a number of attributes in regards to their current fixed line service and provider.

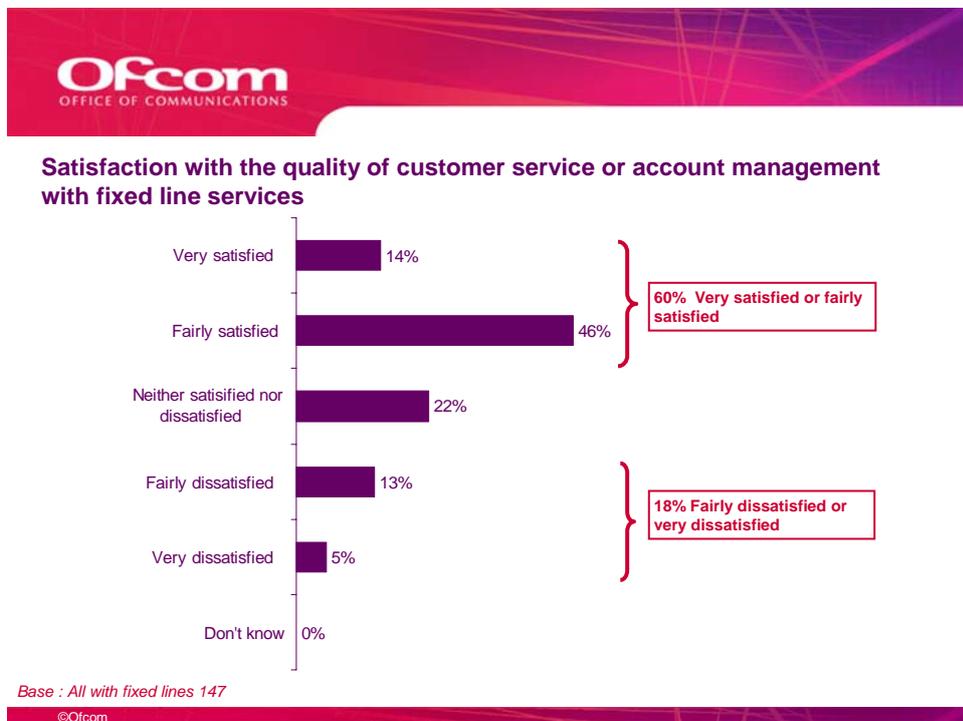
On fixed line services *generally* 73% of large business representatives said they were satisfied with 22% saying they were *very* satisfied. Amongst the remainder of respondents there was little overt dissatisfaction (see Figure 3).

Figure 3



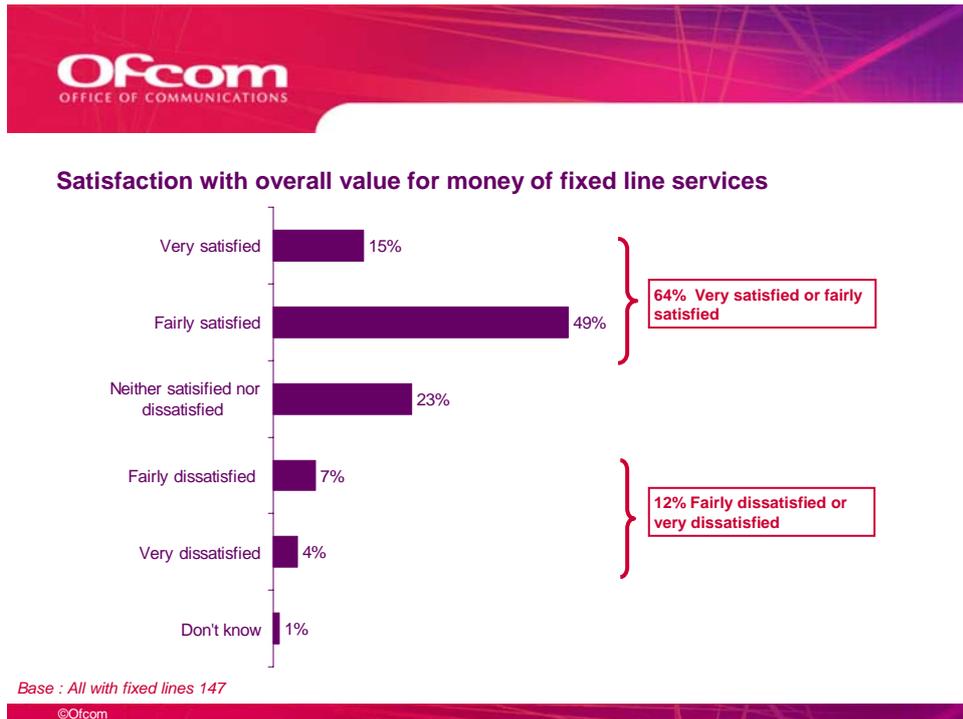
In terms of the perceived quality of customer service or account management with their fixed line services, 60% were satisfied with this whilst 18% commented that they were dissatisfied to some degree (see Figure 4).

Figure 4



With regard to large businesses' views on the overall value for money of fixed line services, the research found that 64% were satisfied whilst 12% were dissatisfied (see Figure 5).

Figure 5

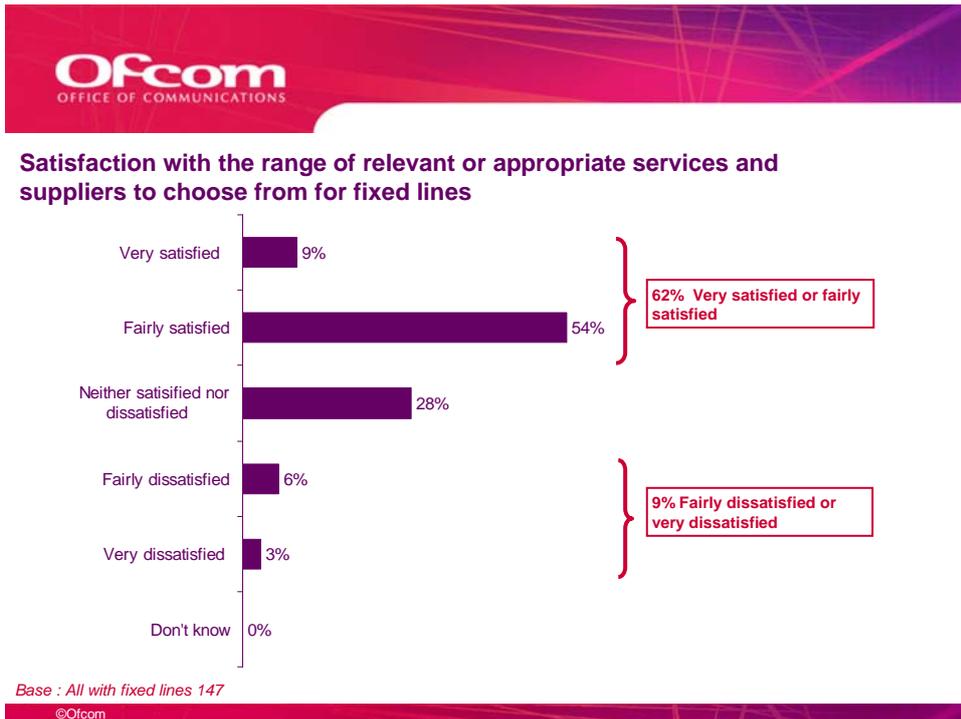


2.3 Range of services and ease of price/quality comparisons

Whilst large businesses are generally satisfied with the *range* of appropriate services and suppliers available for fixed lines, a considerable proportion find it difficult to compare *prices* of these suppliers (38%) and more find it difficult to compare the *quality* of these (53%)

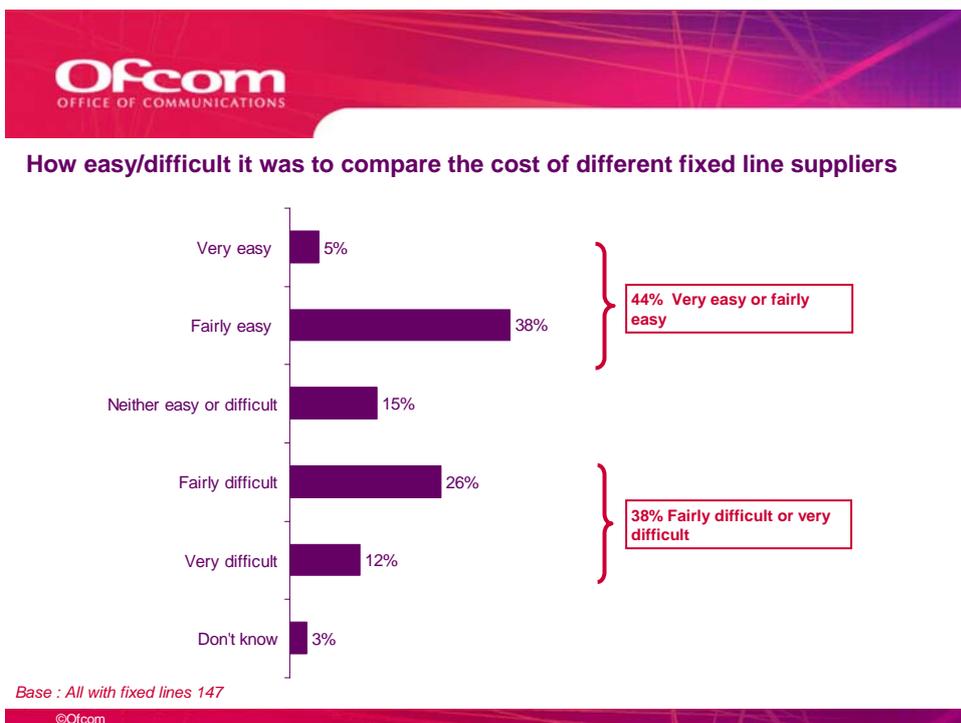
When thinking about fixed line services and suppliers of these services, 62% large businesses were satisfied with the range of relevant or appropriate services and suppliers available to choose from, whilst 9% were not satisfied (see Figure 6).

Figure 6



Large businesses were asked how easy or difficult they found it to compare the *cost* of fixed line suppliers given that this is likely to be a key part of assessing potential suppliers (and were allowed to say 'don't know' if they did not feel able to give an opinion on this). Opinions were divided with 44% saying they found comparing costs for these services easy, whilst 38% said they found this difficult (see Figure 7).

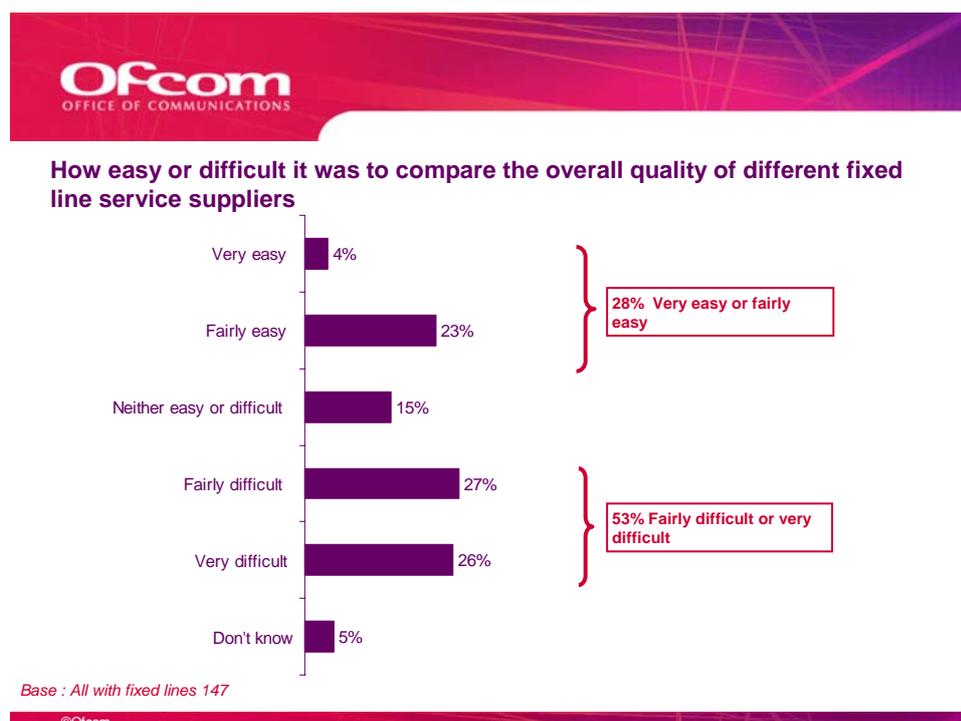
Figure 7



Large businesses were also asked how easy or difficult they found it to compare the *quality* of fixed line suppliers as making this comparison also likely forms part of their assessment of potential suppliers. This assessment may be based on information provided by suppliers themselves or information gathered by other means.

Just over half of the large business respondents (53%) commented that they found it difficult to make comparisons regarding the *quality* of fixed line services available, with 27% saying they found it *very difficult*. More of the large business respondents found it difficult to compare the quality of fixed lines than easy (53% vs 28%) (See Figure 8)

Figure 8



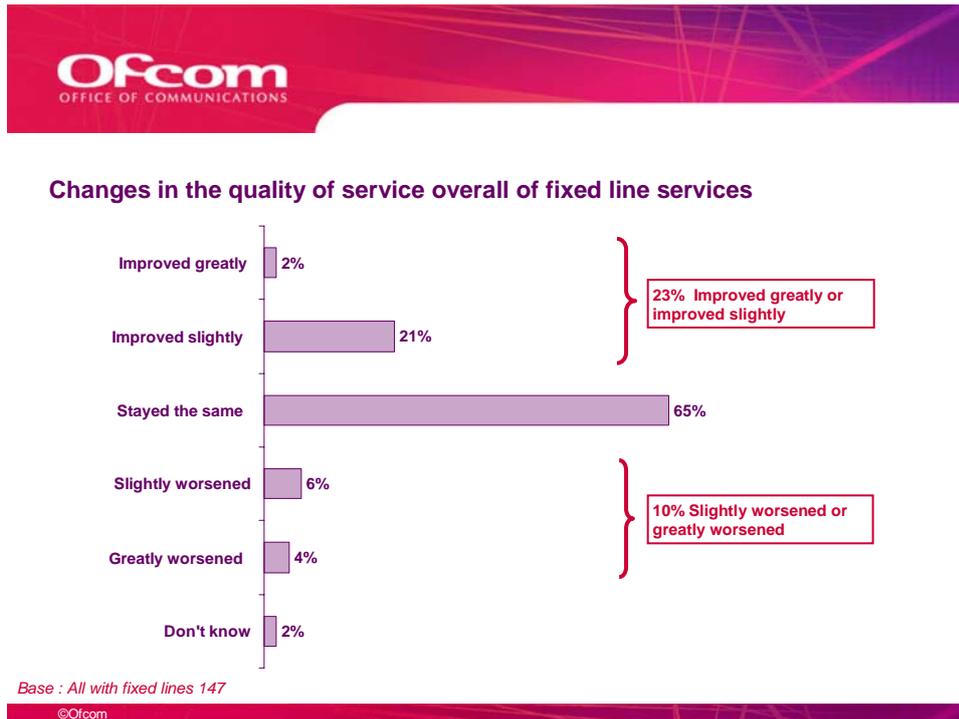
2.4 Changes in the last year

Just over a third of large businesses believe that the choice of suppliers for fixed lines has improved over the last year whilst just under a quarter believe that this is true for the quality of service overall and the quality of customer service/account management on fixed line services

Respondents were asked to rate if and how certain aspects of their fixed line services have changed over the past year or so.

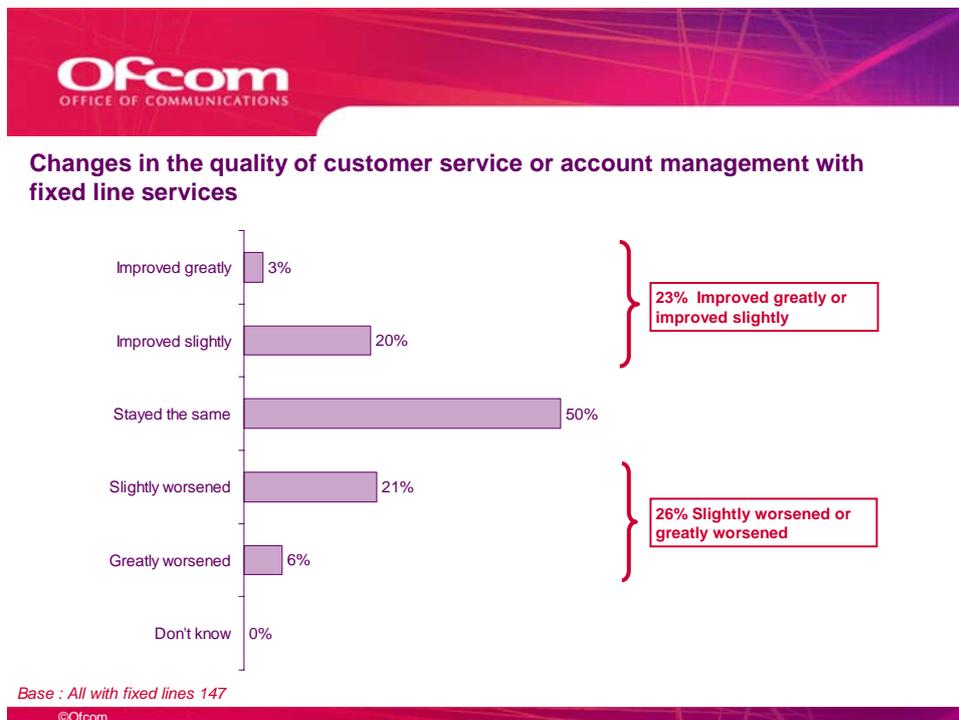
In terms of the perceived quality of service overall, the majority (65%) believed it had stayed the same for fixed lines whilst 23% believed it had improved and 10% thought this has worsened in some way (see Figure 9).

Figure 9



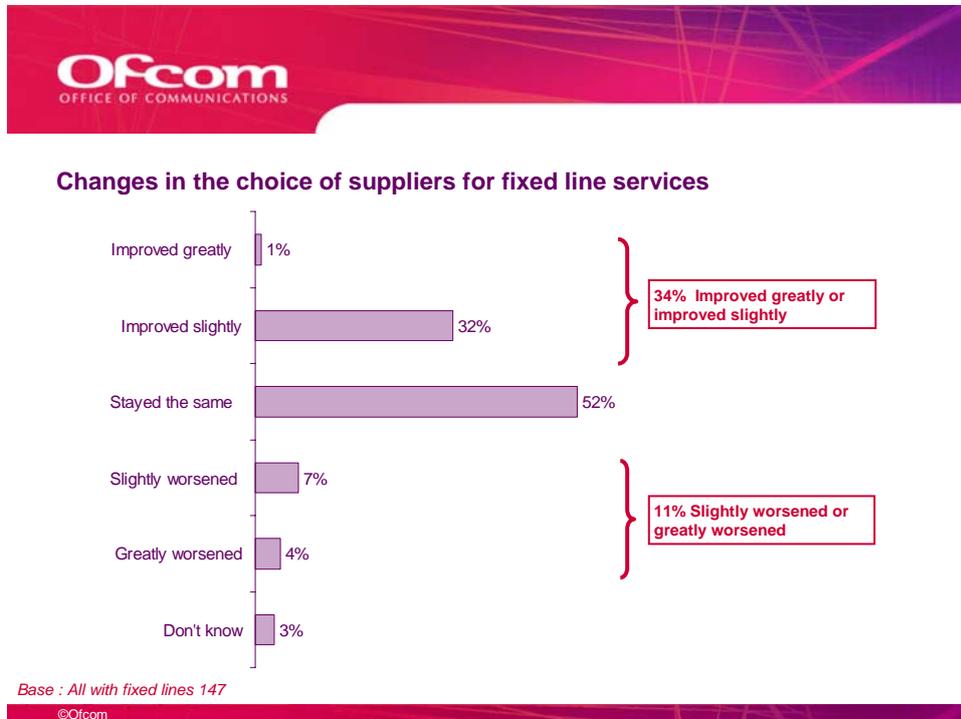
Perceptions on the quality of customer service or account management over the last year or so had remained static for half of the large business respondents (50%) whilst opinion is divided amongst the remainder with 23% commenting this had got better and a similar proportion (26%) thought this had become worse.

Figure 10



Again around half of the respondents said that the *choice* of suppliers had neither improved nor worsened over the last year. However amongst the rest just over a third (34%) said this had improved whilst the smaller proportion of 11% thought that the choice had deteriorated over the year (see Figure 11).

Figure 11



Section 3

Mobile services

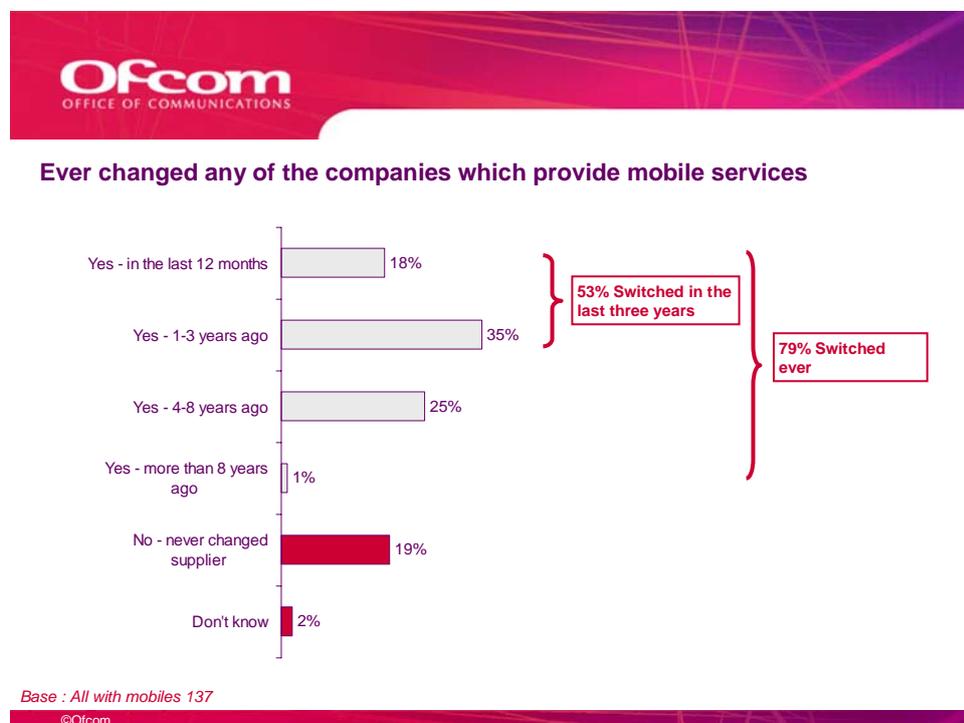
3.1 Switching

Just over half of large businesses say they have switched mobile supplier in the last three years and just over four in ten claim this process was easy

Over 9 in 10 (92%) of all large business respondents said that their business owned or rented mobile phones or other portable communication devices which were currently connected to a network operator.

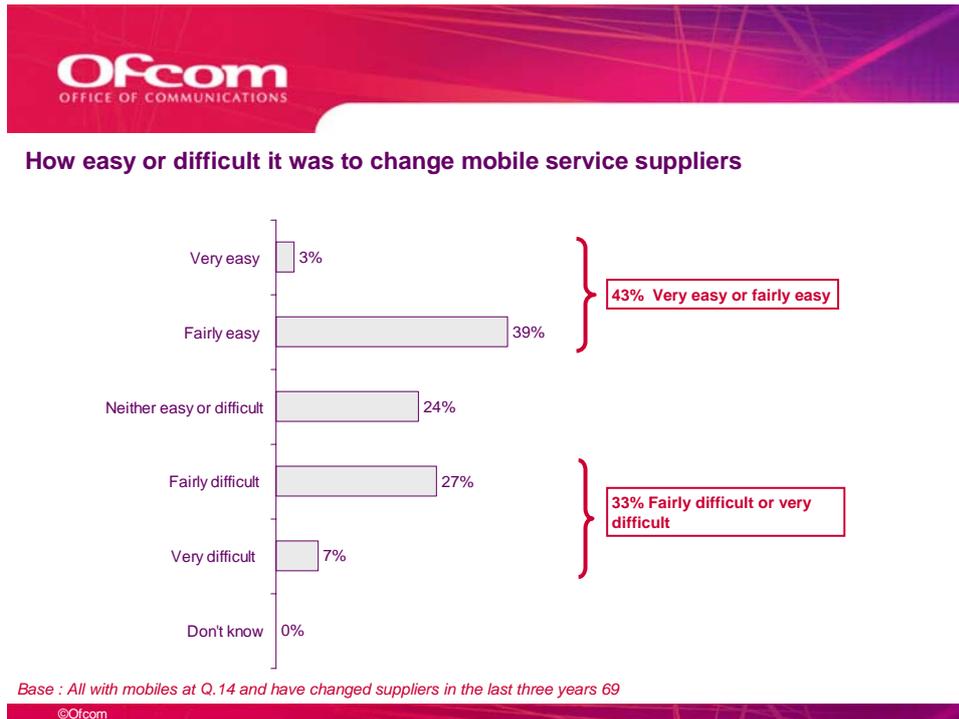
Of these, 53% had changed supplier in the last three years, with 18% having done so in the last 12 months (almost identical levels of switching as for fixed lines) (see Figure 12).

Figure 12



Of those changing suppliers in the last 3 years, 43% said they found the switching process easy regarding mobile phone suppliers, whilst another 33% did say it was difficult to do so (see Figure 13).

Figure 13

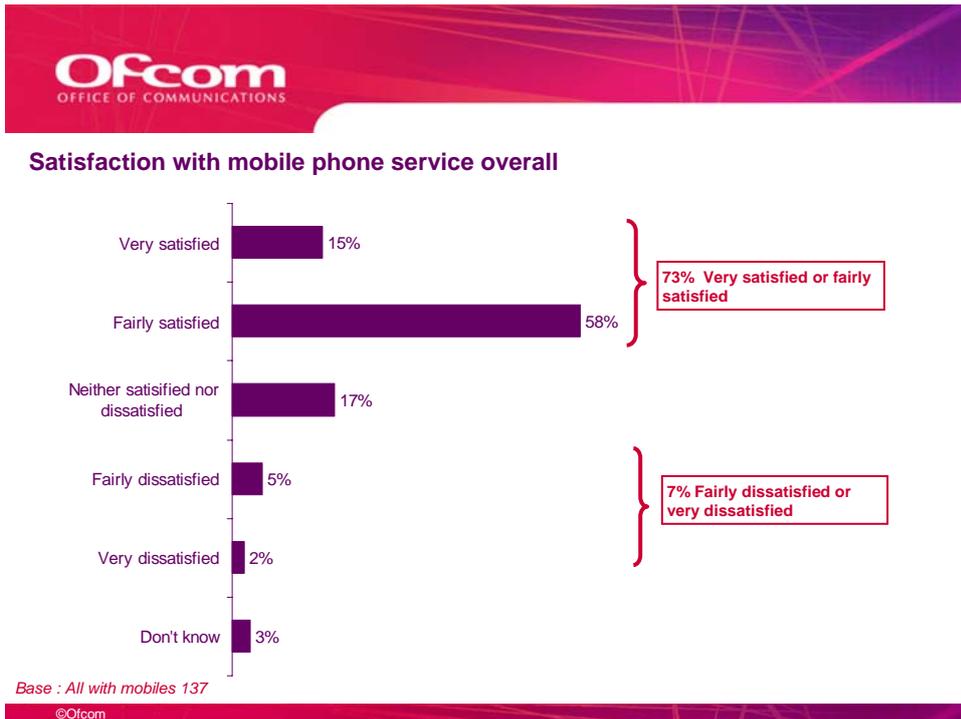


3.2 Satisfaction with service and value

Majority of large businesses were satisfied with their overall mobile services, the customer service/account management and overall value for money of mobiles

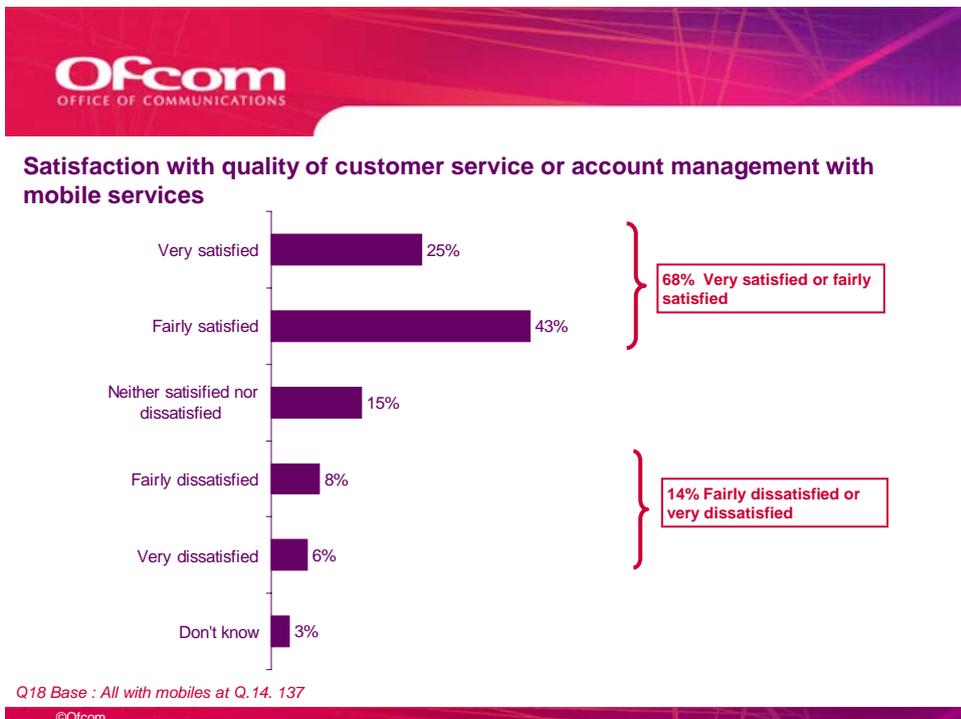
Large businesses with mobiles or other portable communications were asked to give their satisfaction levels on the key attributes with their current services and providers. Satisfaction levels were high with mobile services overall with 73% satisfied with this aspect and 7% dissatisfied to some level.

Figure 14



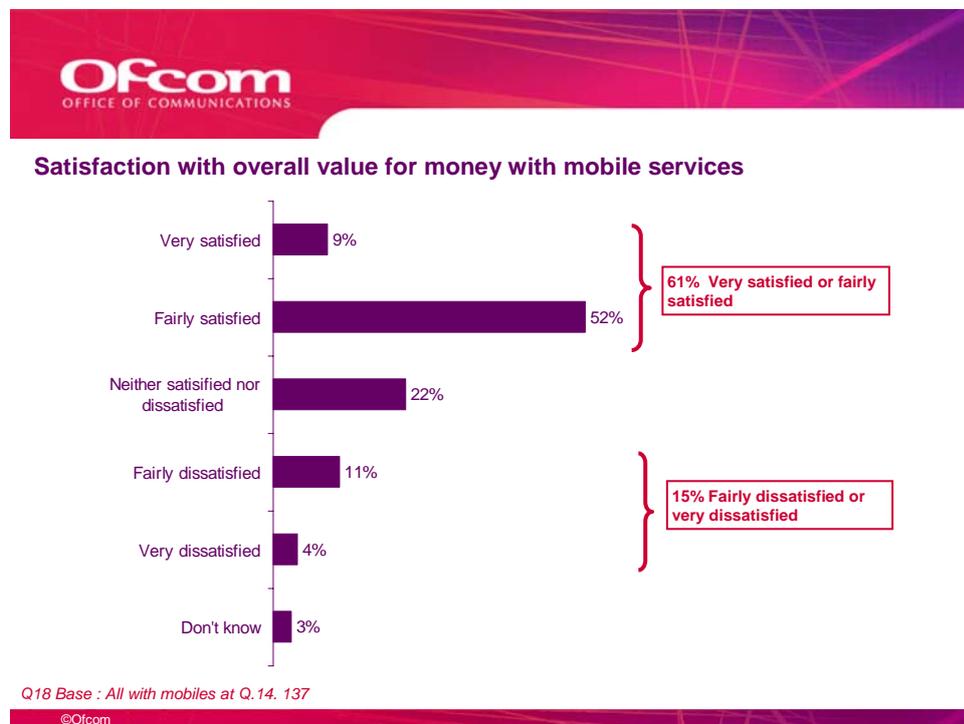
Almost seven in ten (68%) respondents were satisfied with the quality of customer service or account management they receive relating to mobiles with one quarter (25%) claiming to be very satisfied. 14% were dissatisfied with their customer support (See Figure 15).

Figure 15



When asked about their views on the overall value for money relating to their mobile services 61% of large businesses asked said they were satisfied. 14% were dissatisfied with the value for money of these services.

Figure 16

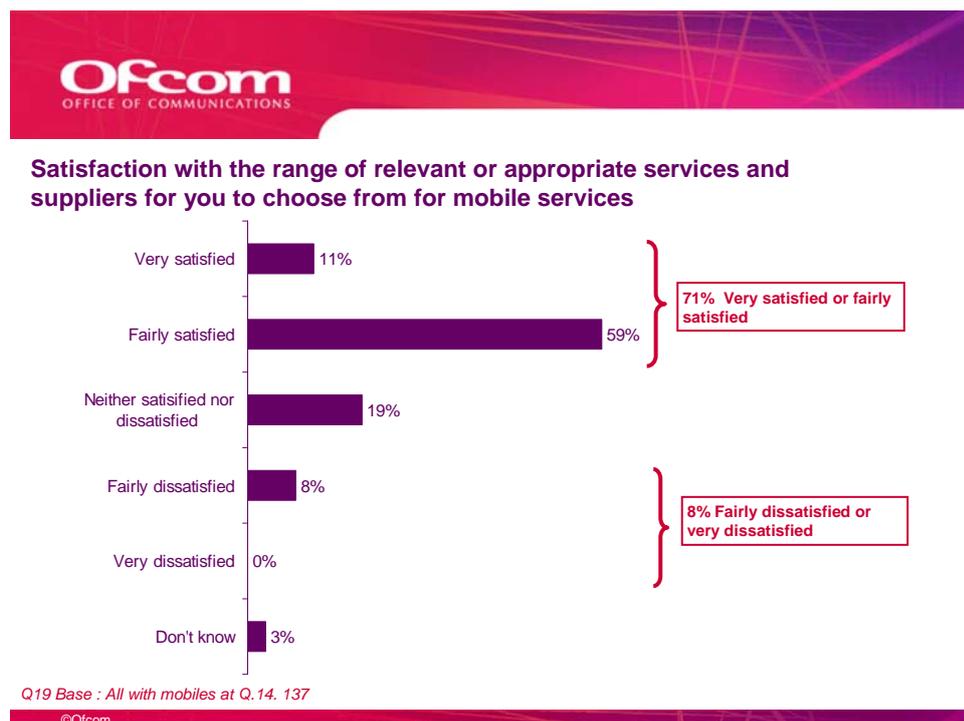


3.3 Range of services and ease of price/quality comparisons

As with fixed lines, large businesses are generally satisfied with the range of mobile suppliers available, but a considerable proportion have had some difficulties when trying to compare the quality of service and the cost of services on offer

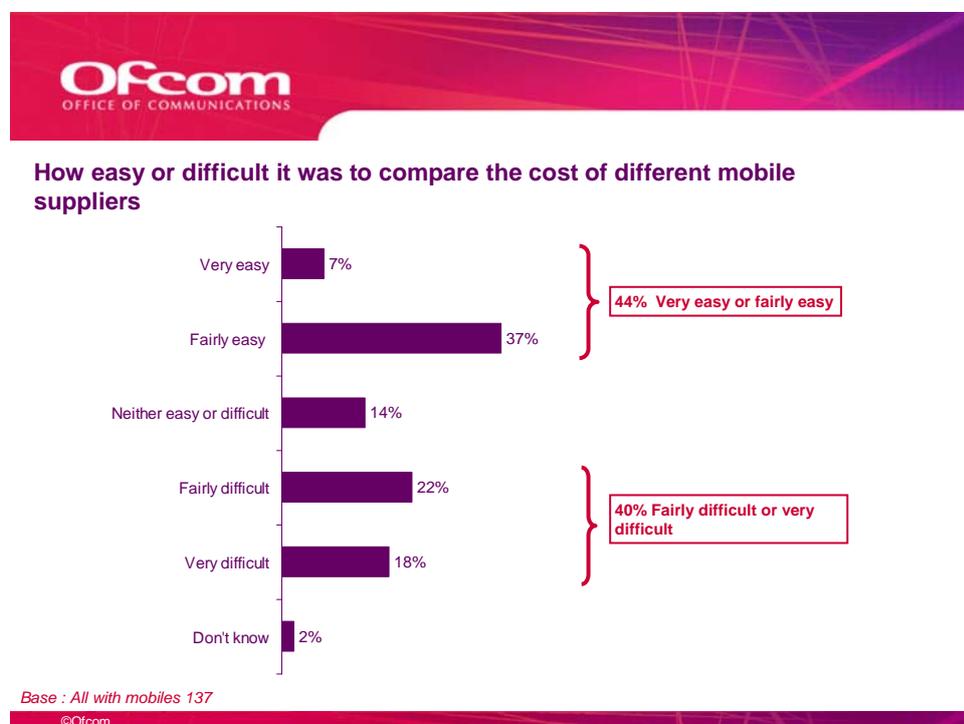
When thinking about the available mobile phone services and suppliers, 71% of those with fixed lines were satisfied with the *range* of relevant or appropriate services and suppliers to choose from. 18% were dissatisfied (see Figure 17).

Figure 17



A similar proportion of large businesses said they found comparing *costs* of fixed lines and mobile services easy (44% for both) and 40% found this action difficult to some level (38% found this for fixed line services) (see Figures 18).

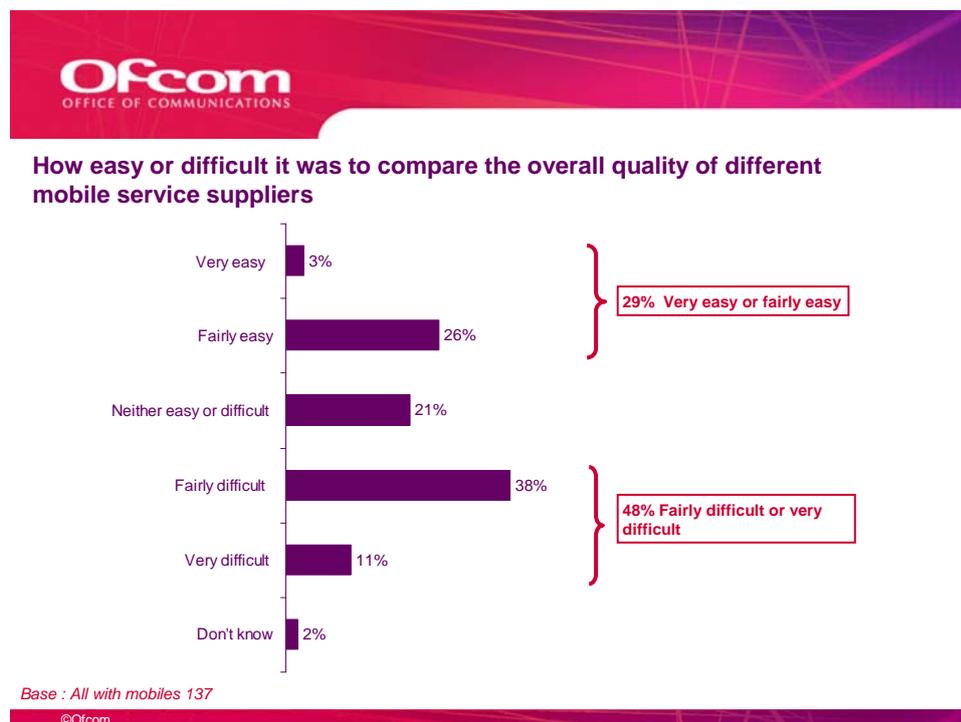
Figure 18



Around half of the large business respondents (48%) commented that they found it *difficult* to make the comparisons of the *quality* of different mobile services (53% said this relating to

fixed lines also). The proportion of large business consumers who found this process easy was considerably smaller at 29% (See Figure 19).

Figure 19



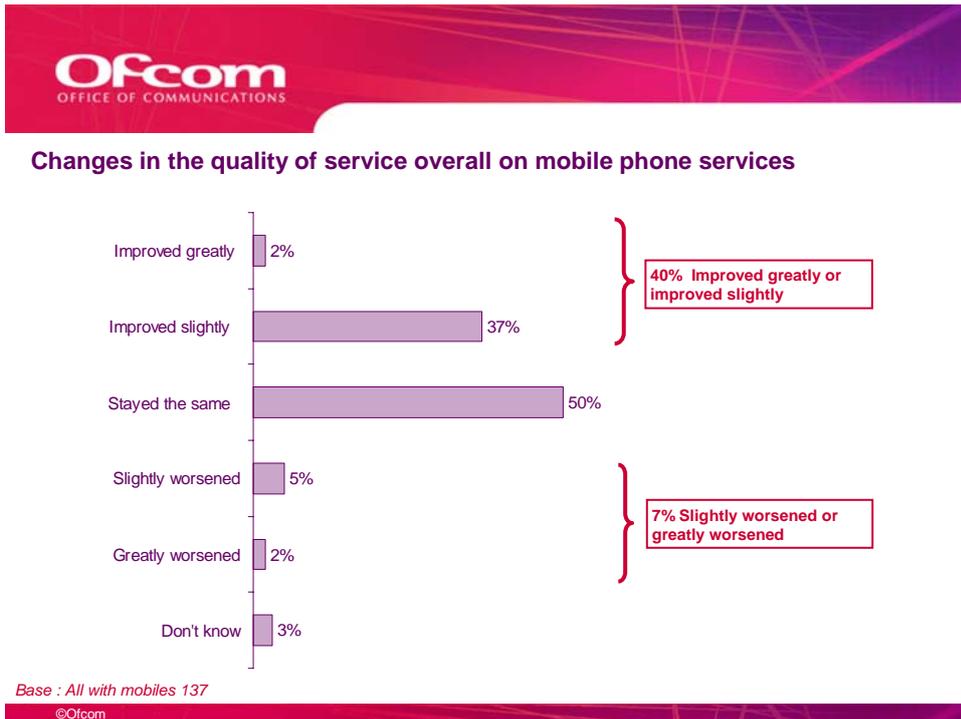
3.4 Changes in the last year

Four in ten large businesses believe that the choice of suppliers for mobile services has improved over the last year and a third believe that this is true for the quality of service overall and the quality of customer service/account management for mobiles

As with fixed line users, mobile phone or other portable communication users were asked to rate if certain aspects of their mobile services had improved or deteriorated over the past year.

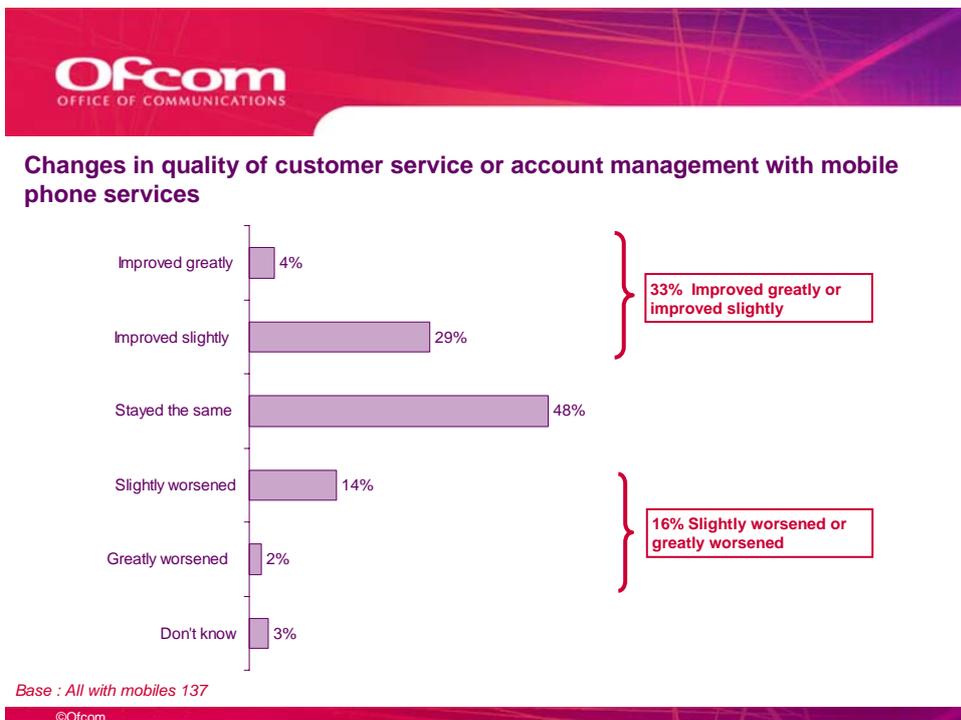
Four in ten (40%) of the large businesses believe that the quality of service relating to their mobile services has improved over the last year and half (50%) saw this as remaining the same. Less than one in ten (7%) thought that the quality of service has decreased (see Figure 20).

Figure 20



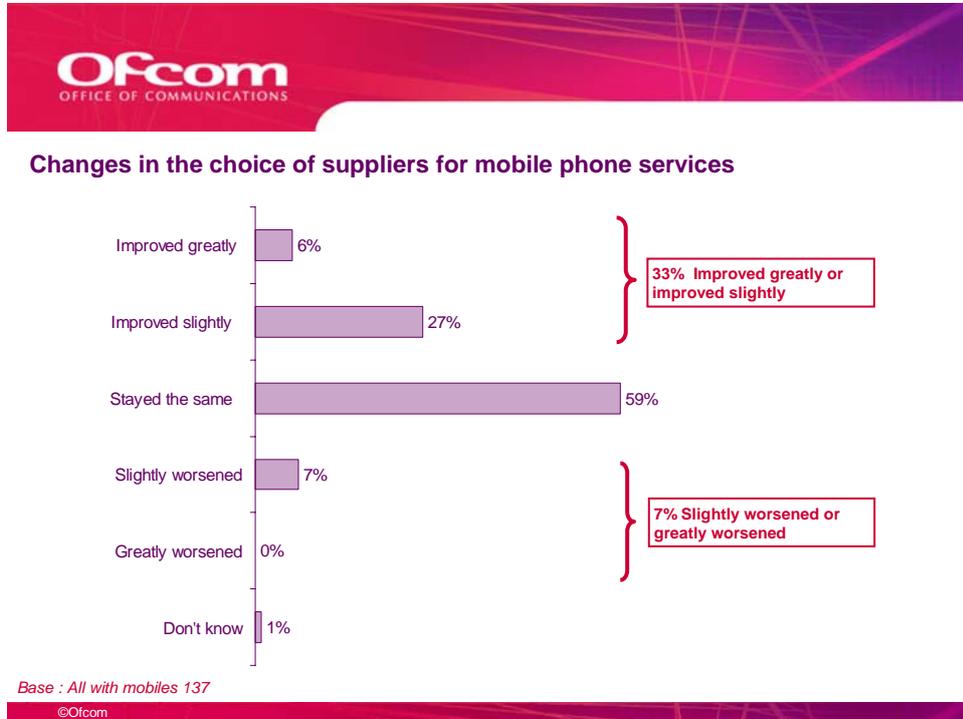
One third (33%) of large businesses commented that the quality of customer service or account management on their mobile services had got better in the last year or so and just under a half (48%) saw this as remaining the same. 16% believe that this facet of their mobile service had deteriorated.

Figure 21



Again a third (33%) of large business representatives said that the choice of mobile services had improved over the past year whilst nearly six in ten (59%) saw this as remaining static. 7% believe that the choice in this market has become worse.

Figure 22



Section 4

Advanced data services

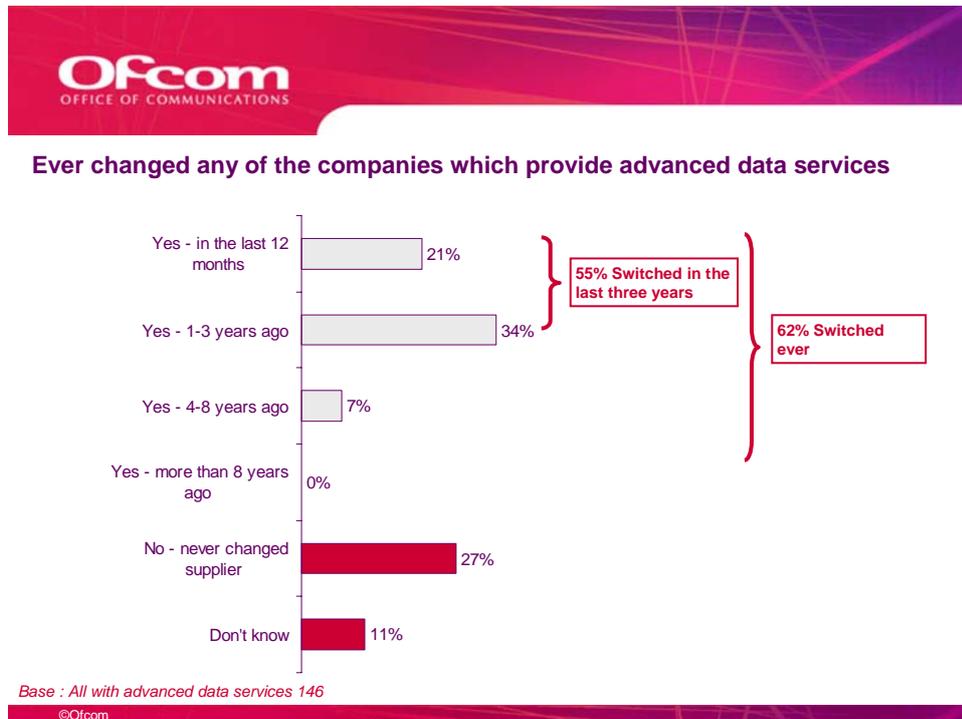
4.1 Switching

Around a half of large businesses interviewed had changed suppliers for their advanced data services in the last three years. Just under a third of these found this switching process easy whilst just fewer than four in ten found this difficult

Advanced data services were defined as including leased lines, IP telephony, access to the Internet, web-hosting, services supporting e-business, security, storage, private circuits and networks.

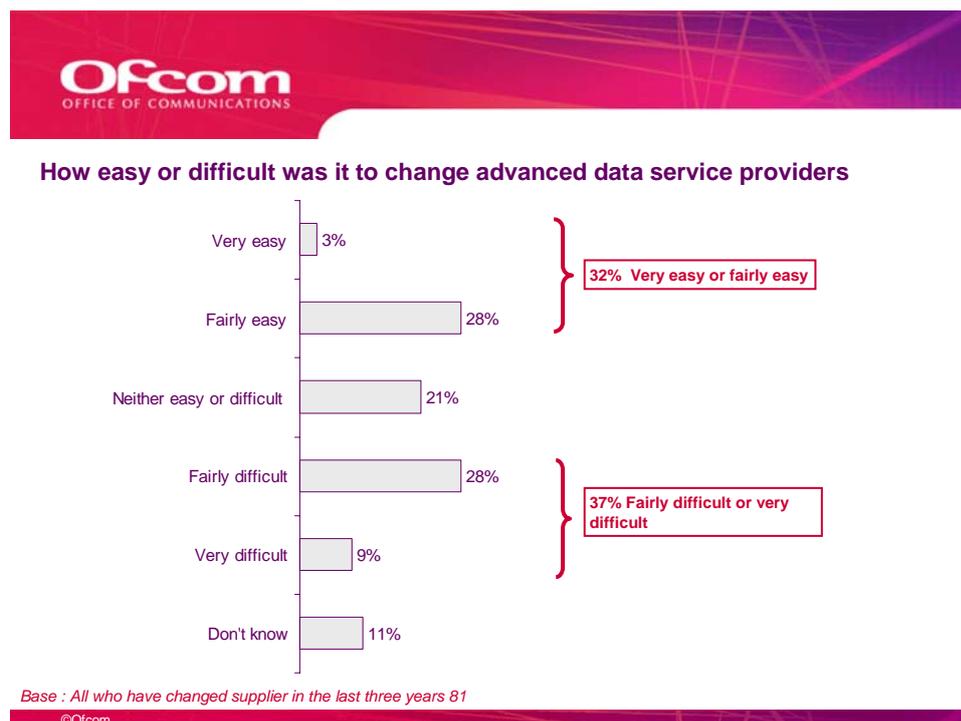
Over half (54%) of all respondents had changed supplier of these types of services in the last three years, with 21% having done so in the last 12 months (see Figure 23).

Figure 23



Of these changing in the last three years, just under a third (32%) thought it was easy to change providers for these advanced data services whilst 37% thought this switching process was difficult (see Figure 24).

Figure 24



4.2 Satisfaction with service and value

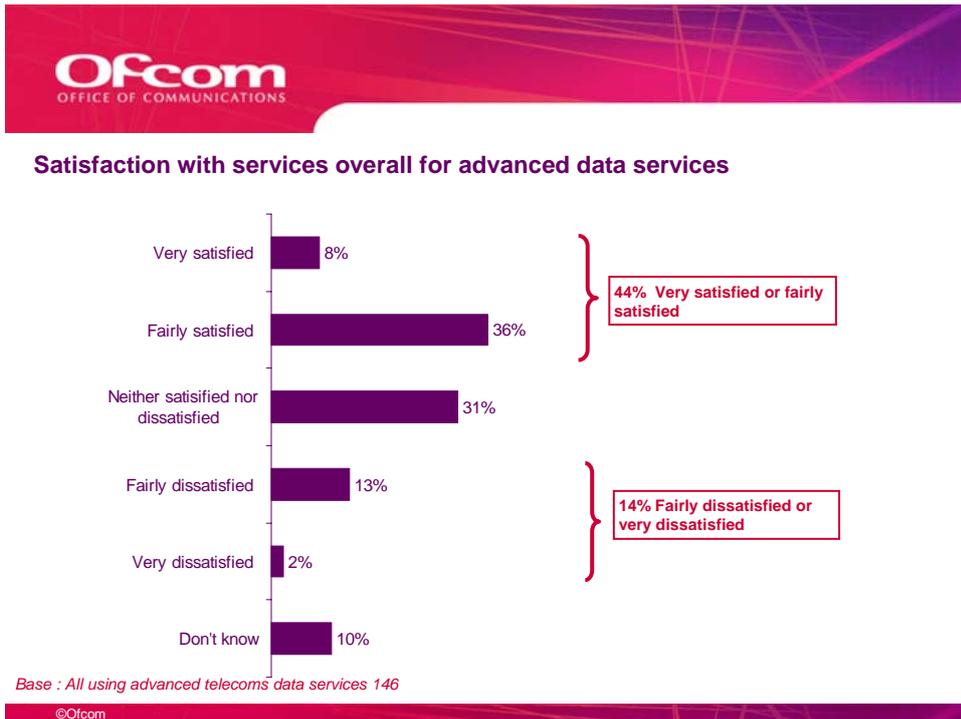
Satisfaction with the overall service, the value of money and the customer service or account management of more advanced data services is lower than that for fixed line or mobile services.

Advanced telecoms data service users were also asked to rate their satisfaction with their current suppliers.

44% of the large business representatives were satisfied with the services they received on more advanced data services. This compares to 74% of respondents being satisfied relating to fixed line and 73% for mobile services.

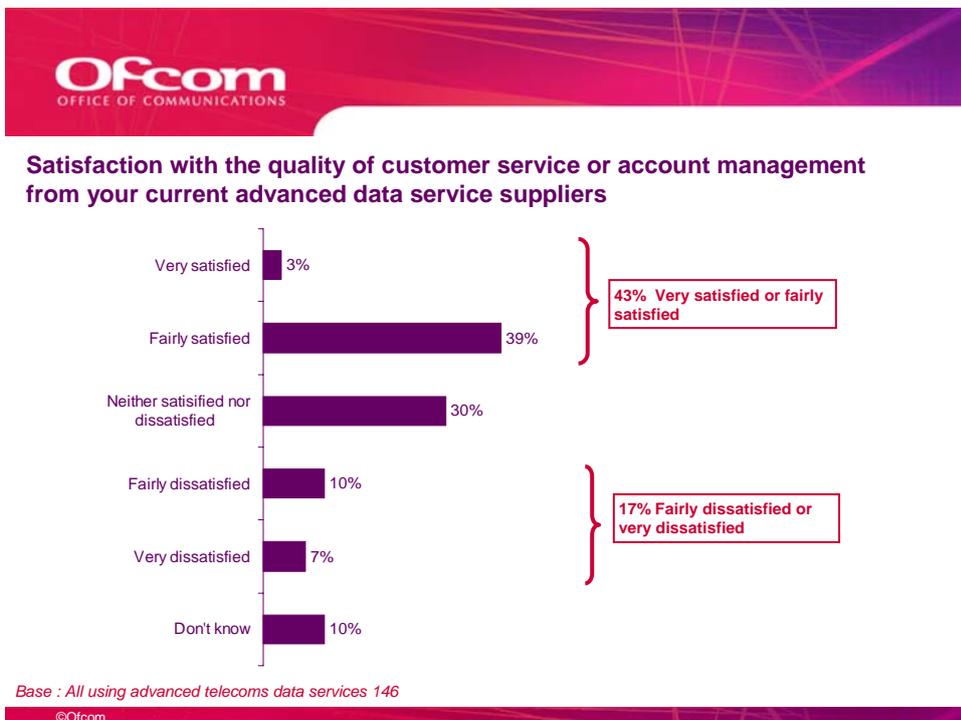
Three in ten of those interviewed were neither satisfied nor dissatisfied with the overall service received on their advanced data services. 14% were dissatisfied to some degree (see Figure 25)

Figure 25



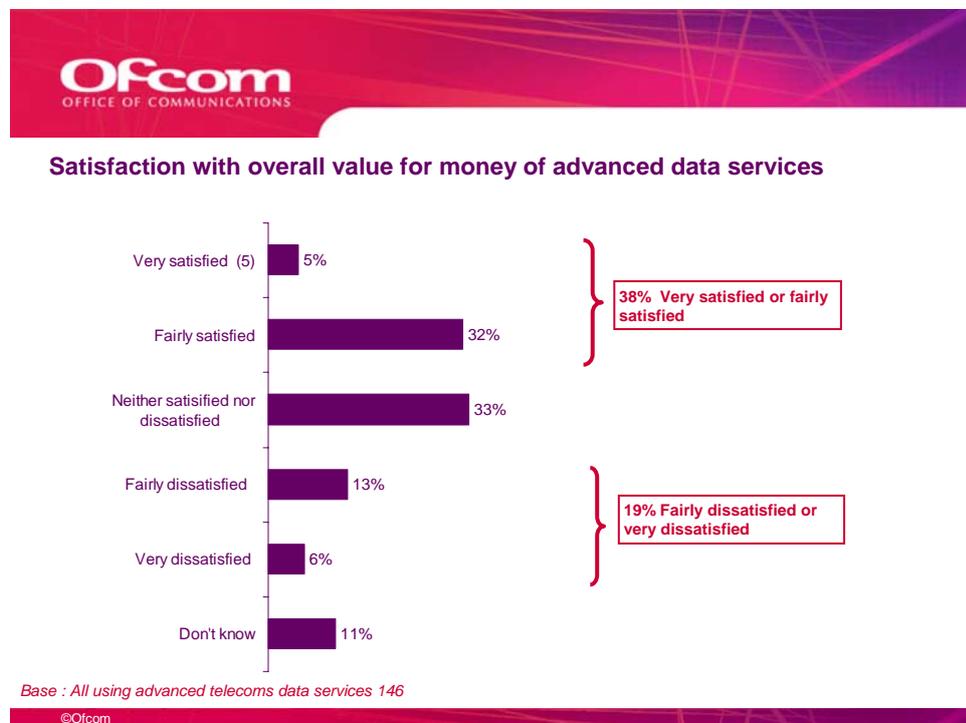
Satisfaction with the quality of *customer service or account management* on more advanced data services (43%) is also lower than that felt for fixed lines or mobile phones (60% and 68% respectively). 43% claim to be satisfied and 17% said they were dissatisfied with this aspect of the advanced data services (see Figure 26).

Figure 26



In addition satisfaction with the *value of money* of more advanced data services is lower than that felt for fixed lines or mobile phones. 38% said they were satisfied and 19% said they were dissatisfied to some degree with the value for money of these services (see Figure 27). Satisfaction on value for money for fixed lines and mobile is 64% and 61% respectively.

Figure 27

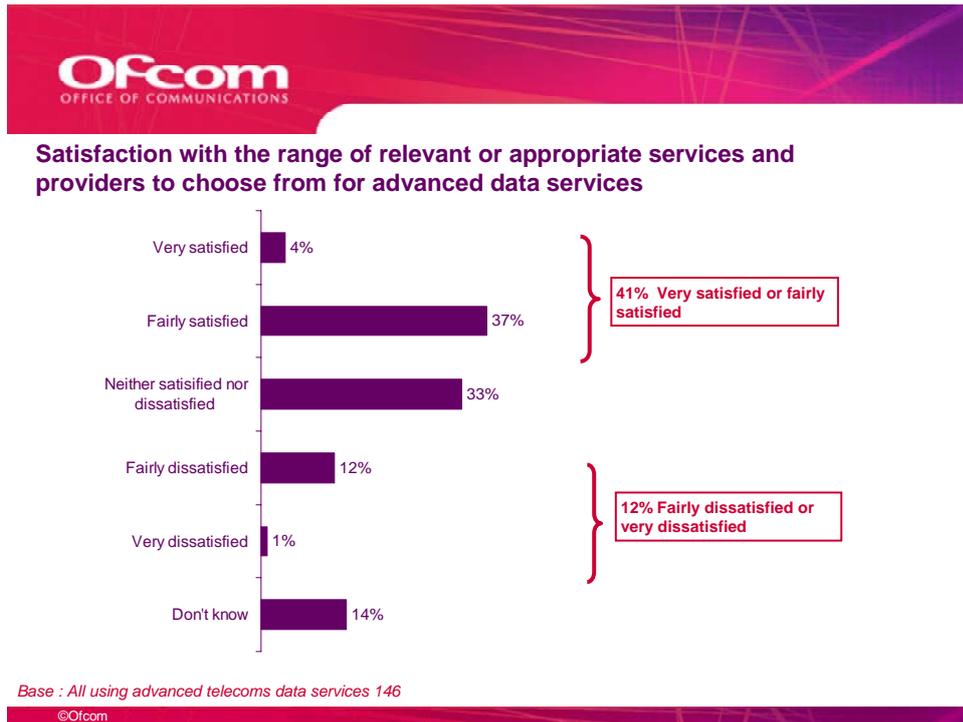


4.3 Range of services and ease of price/quality comparisons

Satisfaction with the range of suppliers available for advanced data services is lower than that for fixed and mobile services with 41% satisfied with this

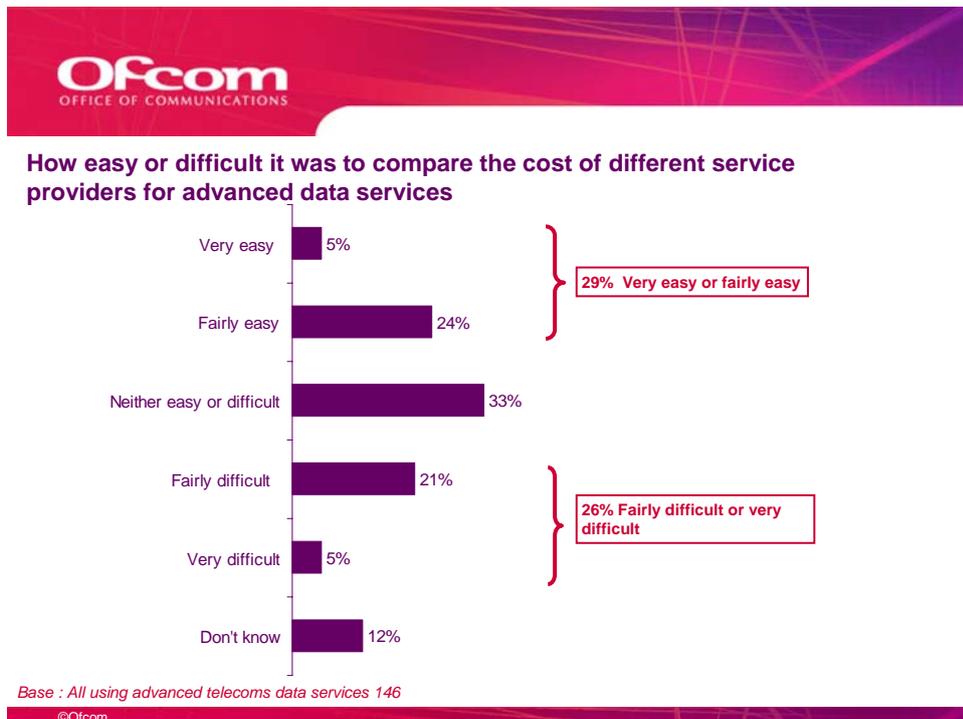
When thinking about all suppliers of telecoms data services that are available, 41% of those who used these services were satisfied with the range of relevant or appropriate services and providers to choose from (see Figure 28). This compares to satisfaction levels regarding the range of suppliers available of 71% for fixed lines and 62% for mobile services.

Figure 28



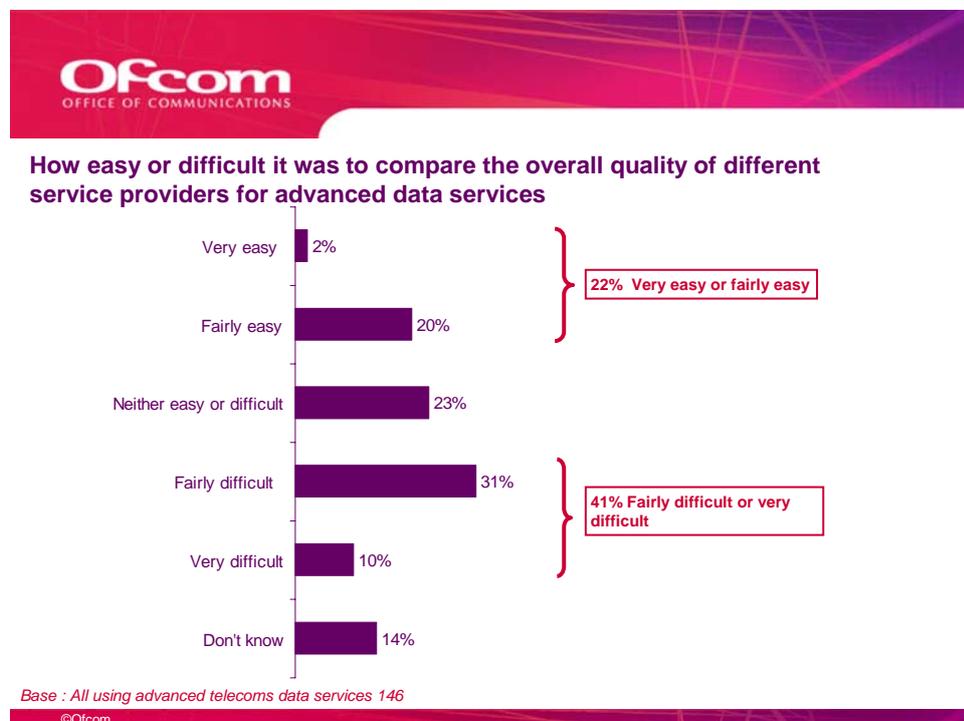
29% of large businesses said they found comparing costs of advanced data services easy and a similar proportion found this process difficult to some level (26%) (see Figures 29). The equivalent findings for ease of comparing prices for fixed line and mobile services were 44% and 37%.

Figure 29



Four in ten large business respondents (41%) said they found it difficult to make the comparisons of the *quality* of different data services (53% said this relating to fixed lines and 44% said this in relation to mobile services). The proportion of large business consumers who found this process easy was 22% (See Figure 30).

Figure 30

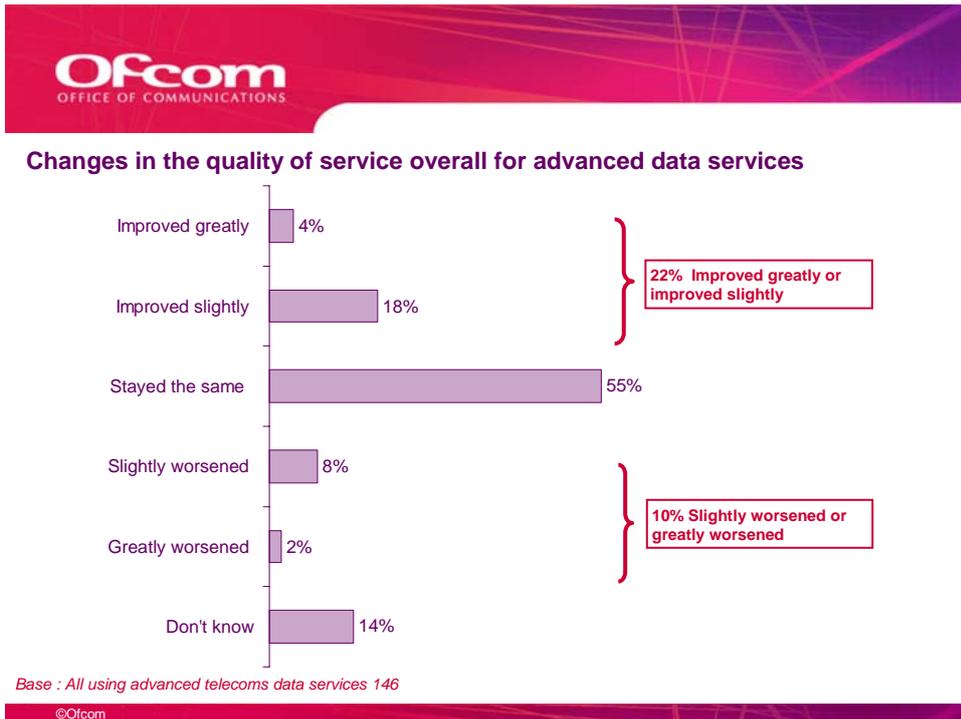


4.4 Changes in the last year

The choice in providers of advanced data services is seen to have improved by 34% of large businesses interviewed; improvements in perceptions of quality of service overall and customer service or account management is less marked (22% and 18%)

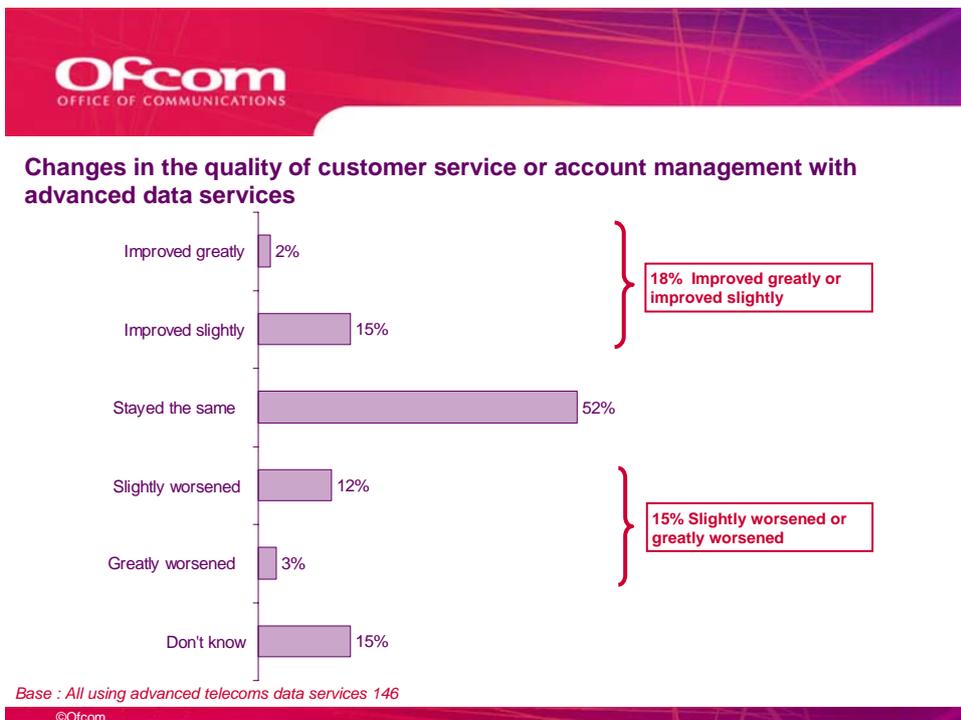
When judging the improvement or deterioration of certain aspects of advanced data services over the last year, 22% of users of these services felt that the quality of service overall had improved. Over half (55%) felt that this aspect has remained the same, another 14% couldn't give an opinion on this whilst 10% thought that quality of service had decreased (see Figure 31).

Figure 31



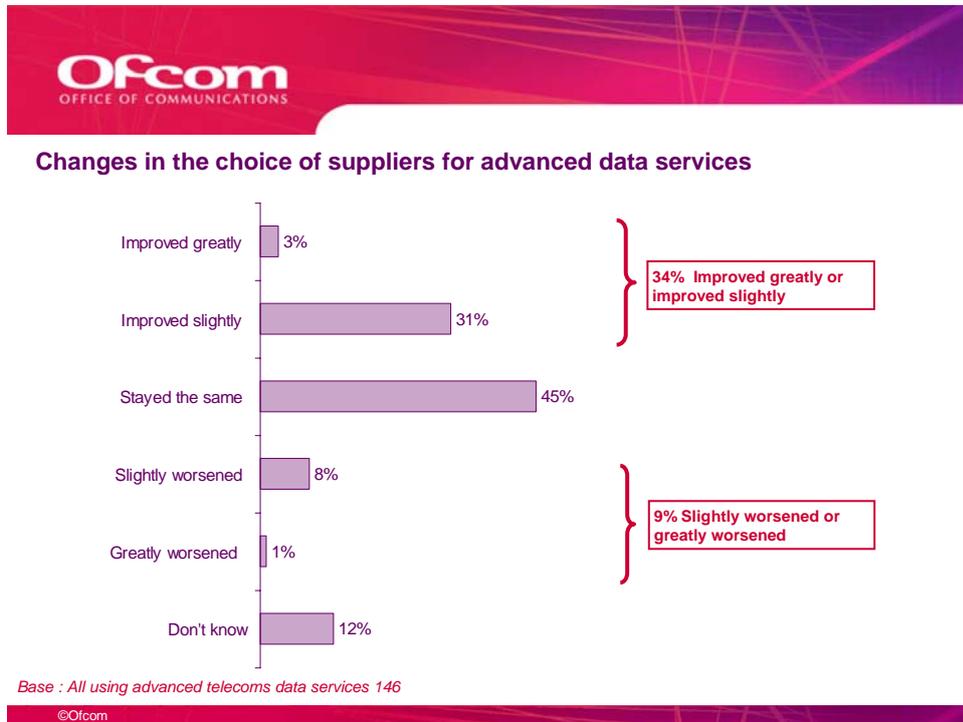
In terms of the quality of customer service or account management on advanced data services, over half of large business users felt it had stayed the same (52%), with 18% believing it had improved. A further 15% believed this has deteriorated over the last year or so.

Figure 32



The research found that 34% of large businesses believe that in the last year the choice of available supplier for data services has improved whilst 9% think this has decreased in some way.

Figure 33



Section 5

Other areas of interest

5.1 Large businesses comments

Large businesses were given an opportunity to comment on any improvements, or any areas that they felt had become more of an issue in the last year

Towards the end of the interview respondents were asked if they had noticed any areas that have particularly improved in the last 12 months relating to telecommunications.

Analysis of the verbatim comments indicated that the main areas of improvement noted amongst large business representatives (by 4% or more of the sample) were:

- Choice/choice of service providers (11%)
- Costs/cheaper/becoming more competitive (8%)
- VoIP/IP technology (7%)
- Account management improvements (6%)
- Costs of fixed line calls (6%)
- Cost of line rentals (4%)
- Costs of mobile calls (4%)

Individual elements relating to costs or prices were mentioned as outlined above, however if all of these mentions are looked at together, **20%** of the sample mentioned that there have been improvements relating to some aspect of costs or prices.

Respondents were also asked if there was anything (else) relating to telecoms that had become an important issue for your company in the last year. This question found that the main issues mentioned (by 4% or more of the sample) were:

- VoIP/IP technology (11%)
- Call costs/pricing (8%)
- Poor account management/customer services (7%)
- Mobile/ remote workforce (7%)
- Convergence issues (4%)

Again if all mentions of the various elements of costs and pricing are looked at together, **11%** of the sample mentioned that this had become an important issue for their company.

5.2 Account managers and independent consultants/agencies

Large businesses tend to deal with a named account manager

Virtually all respondents said their company dealt with a specific named account manager within their telecoms suppliers (98%), with 34% saying they had this type of contact with all their telecoms suppliers.

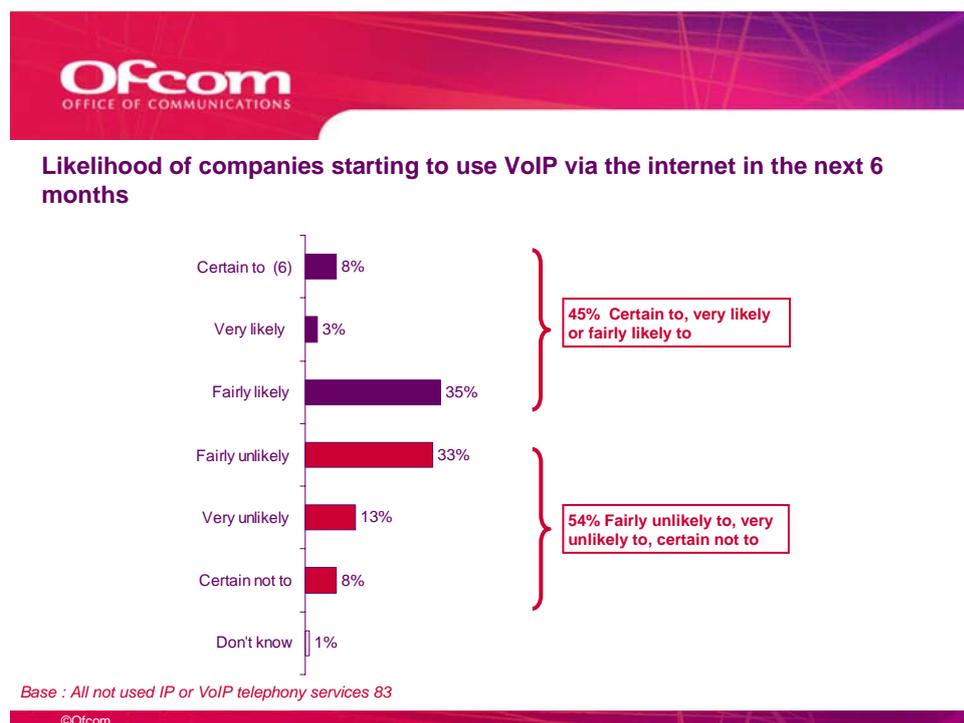
29% of all respondents said they also used independent consultants or agencies to support the planning and management of their telecoms services.

5.3 IP telephony/VoIP services

VoIP is already in use by almost a third of large businesses, and almost half of the others (45%) intend to use this in the near future

Specific questions were asked about the current use and future use of VoIP. Three in ten (29%) of all large businesses within the survey currently use IP telephony. Of those not using this type of telephony, 45% claimed that they were likely to do so in the next 6 months, with 8% feeling certain they would.

Figure 34



Annex 1

Methodology

1.1 Details of research in May/June 2006

All members of Ofcom's Large Business Panel were emailed an invitation to participate in the on-line survey. The questionnaire for this survey was hosted online by Continental Research from 26th May to 15th June 2006.

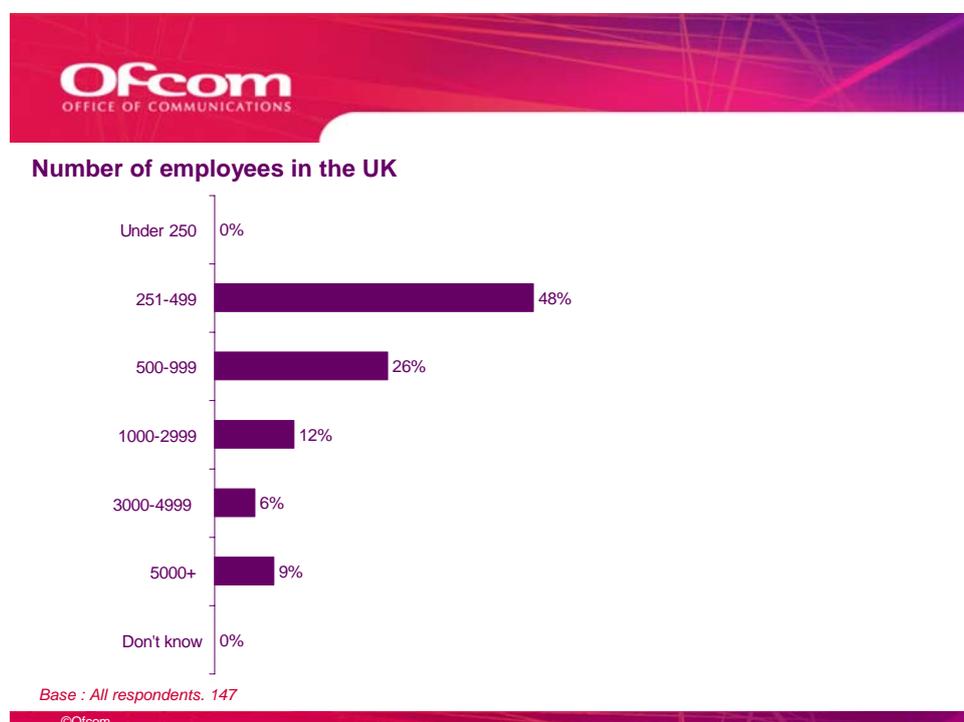
Members of the Panel were emailed regarding the survey and non-responders were subsequently emailed two reminders. Up to four further attempts were made to contact them by telephone to prompt them to participate.

All respondents worked for large companies (i.e. those with 250 or more employees) and had responsibility for telecoms decision making.

A total of 147 responses were received, which were weighted by company size to match the profile of all large UK businesses as defined by the Office of National Statistics (see Figure a). Unweighted bases are indicated throughout this report.

Four £250 charity donations were made on behalf of randomly selected respondents (to charities of their choice) as an incentive to participate.

Figure a



Annex 2

Questionnaire

2.1 Questions asked within the research

Q2 ASK ALL

How many employees does your company employ in the UK?

	(13)
Under 250	Go to close
251-499	Go to Q4
500-999	Go to Q4
1000-2999	Go to Q4
3000-4999	Go to Q4
5000+	Go to Q4
Don't know	Go to Q3

Q3 ASK OF ALL UNSURE AT Q2.

Would you say it's more or less than 250?

	(14)
Under	Go to Close
Over	Go to Q4
Don't know	Go to Close

Q4 ASK ALL

Could you tell me which of these bands the annual turnover or sales of your company falls into?
SINGLE CODE

	(15)
Under £1m	1
Over £1m-£5m	2
Over £5-£10m	3
Over £10m-£20m	4
Over £20m-£50m	5
Over £50m	6
Don't know	Y

Q5 ASK ALL

What is the principal activity of your company/organisation?
SINGLE CODE

	(16)
Oil/chemicals/plastics	1
Pharmaceuticals	2
Refining/production of metals	3
Manufacture of cars/aircraft/ships/other vehicles	4
Computers/office equipment	5
Telecommunications	6
Construction/civil engineering/building materials/other engineering	7
Paper/printing/publishing	8
Food/drink/tobacco	9

	(17)
Textiles/furniture/clothing	0
Other manufacturing	1
Power/energy/supply services	2
Insurance/banking/other financial services	3
Freight/distribution/courier	4
Import/export/retail/wholesale	5
Travel/entertainment	6
Other business/professional services	7
Other	8
	(18-20)

Q6	What is the postcode of your head office? (WRITE IN)	(21-22)
		(23)
	DON'T KNOW	1

Q7	ASK IF DON'T KNOW CODED AT Q6	
	In which of these regions would you say your head office is based?	
	SINGLE CODE	(24)
	South East	1
	South West	2
	East Midlands	3
	West Midlands	4
	Yorks and Humberside	5
	East Anglia	6
	North East	7
	North West	8
	Scotland	9
	Northern Ireland	0
	Wales	1
	London	2
	Don't know	3

Q8 NO Q8

Q9	Have you ever changed any of the companies which provide your fixed line phone services?	
	Please do not consider companies that <i>only</i> supply leased lines, IP telephony or other services relating to the Internet as these will be covered later on.	
		(28)
	Yes - in the last 12 months	Go to Q11
	Yes - 1-3 years ago	Go to Q11
	Yes - 4-8 years ago	Go to Q10
	Yes - more than 8 years ago	Go to Q10
	No - never changed supplier	Go to Q12
	Don't know	Go to Q12
	Don't have fixed lines	Go to Q16

Q10 NO Q10

Q11 ASK ALL WITH FIXED LINES

Overall, how easy or difficult have you found it to do the following?
ROTATE ORDER.

		Very easy	Fairly easy	Neither easy or difficult	Fairly difficult	Very difficult	Don't know
Compare the overall quality of different fixed line service suppliers	(30)	1	2	3	4	5	6
Compare the cost of different fixed line suppliers	(31)	1	2	3	4	5	6
(IF CODE 1 OR 2 AT Q9 - CHANGED SUPPLIER IN LAST 3 YEARS) Change fixed line service suppliers	(32)	1	2	3	4	5	6

Q12 ASK ALL CODING 3-5 AT Q9

And how easy or difficult do you think it would be to...

ROTATE ORDER.

		Very easy	Fairly easy	Neither easy or difficult	Fairly difficult	Very difficult	Don't know
(IF NEVER CHANGED SUPPLIER - CODE 5 AT Q9 ONLY) Change fixed line service supplier	(33)	1	2	3	4	5	6
(IF CHANGED SUPPLIER MORE THAN 3 YEARS AGO ONLY - CODE 3 OR 4 AT Q9) Change fixed line service suppliers nowadays	(34)	1	2	3	4	5	6

Q13 ASK ALL WITH FIXED LINES

Thinking about your current fixed line service and supplier, how satisfied or dissatisfied are you with them on the following attributes?

SINGLE CODE FOR EACH STATEMENT

		Very satisfied	Fairly satisfied	Neither satisfied nor dissatisfied	Fairly dissatisfied	Very dissatisfied	Don't know
Your fixed line services overall	(35)	1	2	3	4	5	6
The quality of customer service or account management with your fixed line services	(36)	1	2	3	4	5	6
Overall value for money of your fixed line services	(37)	1	2	3	4	5	6

Q14 And thinking about all fixed line services and suppliers (not just the ones you use), how satisfied or dissatisfied are you with the range of relevant or appropriate services and suppliers for you to choose from?
SINGLE CODE

(38)

- Very satisfied1
- Fairly satisfied.....2
- Neither satisfied nor dissatisfied.....3
- Fairly dissatisfied.....4
- Very dissatisfied.....5
- Don't know6

Q15 Over the last year or so, do you think the following have improved, stayed the same or have become worse?

SINGLE CODE FOR EACH STATEMENT. ROTATE ORDER

		Improved greatly	Improved slightly	Stayed the same	Slightly worsened	Greatly worsened	Don't know
The quality of service overall on your fixed line services	(39)	1	2	3	4	5	6
The quality of customer service or account management with your fixed line services	(40)	1	2	3	4	5	6
The choice of suppliers for fixed line services	(41)	1	2	3	4	5	6

Q16 NO Q16

Q17 ASK ALL CODING 'Yes' AT Q16 OTHERS TO Q24

Now thinking about any mobile phones or other portable communications devices that your company owns or rents which are currently connected to a network operator (including devices such as Blackberries, XDA's, etc.). Have you ever changed any of the companies which provide these mobile services

SINGLE CODE

(43)

- Yes - in the last 12 months1
- Yes - 1-3 years ago2
- Yes - 4-8 years ago3
- Yes - more than 8 years ago4
- No - never changed supplier.....5
- Don't have mobile services7
- Don't know8

Q18 NO Q18.

Q19 ASK ALL WITH MOBILES

Overall, how easy or difficult have you found it to do the following...

ROTATE ORDER.

		Very easy	Fairly easy	Neither easy or difficult	Fairly difficult	Very difficult	Don't know
Compare the overall quality of different mobile service suppliers	(45)	1	2	3	4	5	6
Compare the cost of different mobile suppliers	(46)	1	2	3	4	5	6
(IF CHANGED SUPPLIER IN LAST 3 YEARS - CODE 1 OR 2 AT Q17) Change mobile service suppliers	(47)	1	2	3	4	5	6

Q20 ASK ALL CODING 3-5 AT Q17.

And how easy or difficult do you think it would be to...

ROTATE ORDER.

		Very easy	Fairly easy	Neither easy or difficult	Fairly difficult	Very difficult	Don't know
(IF NEVER CHANGED SUPPLIER - CODE 5 AT Q17 ONLY) Change mobile service supplier	(48)	1	2	3	4	5	6
(IF CHANGED SUPPLIER MORE THAN 3 YEARS AGO ONLY - CODE 3 OR 4 AT Q17) Change mobile service supplier nowadays	(49)	1	2	3	4	5	6

Q21 Thinking about your current mobile phone services, how satisfied or dissatisfied are you with them on the following attributes? SINGLE CODE FOR EACH STATEMENT

		Very satisfied	Fairly satisfied	Neither satisfied nor dissatisfied	Fairly dissatisfied	Very dissatisfied	Don't know
Your mobile phone service overall	(50)	1	2	3	4	5	6
The quality of customer service or account management	(51)	1	2	3	4	5	6
Overall value for money	(52)	1	2	3	4	5	6

Q22 And thinking about all mobile phone services and suppliers (not just the ones you use), how satisfied or dissatisfied are you with the range of relevant or appropriate services and suppliers for you to choose from?
SINGLE CODE

(53)

- Very satisfied1
- Fairly satisfied.....2
- Neither satisfied nor dissatisfied.....3
- Fairly dissatisfied.....4
- Very dissatisfied.....5
- Don't know6

Q23 Over the last year or so, do you think the following have improved, stayed the same or have become worse? SINGLE CODE FOR EACH STATEMENT. ROTATE ORDER.

		Improved greatly	Improved slightly	Stayed the same	Slightly worsened	Greatly worsened	Don't know
The quality of service overall on your mobile phone services	(54)	1	2	3	4	5	6
The quality of customer service or account management with your mobile phone services	(55)	1	2	3	4	5	6
The choice of suppliers for mobile phone services	(56)	1	2	3	4	5	6

Q24 ASK ALL

And now thinking about your company's usage of more advanced telecoms *data* services such as leased lines, IP telephony, access to the internet, web-hosting, services supporting e-business, security, storage, private circuits and networks amongst others.

Have you ever changed any of the companies which provide any of these types of services?

(57)

- Yes - in the last 12 months Go to Q26
- Yes - 1-3 years ago Go to Q26
- Yes - 4-8 years ago Go to Q25
- Yes - more than 8 years ago Go to Q25
- No - never changed supplier..... Go to Q25
- Don't know Go to Q25
- Don't have any of these Go to Q36

Q25 NO Q25

Q26 ASK ALL USING ADVANCED TELECOMS DATA SERVICES (1-6 AT Q24)

Overall, how easy or difficult have you found it to do the following regarding these advanced data services....

		Very easy	Fairly easy	Neither easy or difficult	Fairly difficult	Very difficult	Don't know
Compare the overall quality of different service providers	(59)	1	2	3	4	5	6
Compare the cost of different service providers	(60)	1	2	3	4	5	6
(IF CHANGED SUPPLIER IN LAST 3 YEARS (CODE 1-2 Q24) Change internet service providers	(61)	1	2	3	4	5	6

Q27 ASK ALL CODING 3-5 AT Q24

And how easy or difficult do you think it would be to...

		Very easy	Fairly easy	Neither easy or difficult	Fairly difficult	Very difficult	Don't know
(IF NEVER CHANGED SUPPLIER - CODE 5 AT Q24) change service provider	(62)	1	2	3	4	5	6
(IF NOT CHANGED SUPPLIER IN LAST 3 YEARS - (CODE 3-4 AT Q24) change service providers nowadays	(63)	1	2	3	4	5	6

Q28 Thinking about your current suppliers of advanced data services, how satisfied or dissatisfied are you with them on the following attributes? SINGLE CODE FOR EACH STATEMENT.

		Very satisfied	Fairly satisfied	Neither satisfied nor dissatisfied	Fairly dissatisfied	Very dissatisfied	Don't know
The services overall	(64)	1	2	3	4	5	6
The quality of customer service or account management from your current suppliers	(65)	1	2	3	4	5	6
Overall value for money of the services	(66)	1	2	3	4	5	6

Q29 And thinking about *all* suppliers of these advanced data services (not just the ones you use), how satisfied or dissatisfied are you with the range of relevant or appropriate services and providers for you to choose from? SINGLE CODE (67)

Very satisfied1
 Fairly satisfied2
 Neither satisfied nor dissatisfied3
 Fairly dissatisfied4
 Very dissatisfied5
 Don't know6

Q30 Over the last year or so, do you think the following have improved, stayed the same or have become worse for these advanced data services generally? SINGLE CODE FOR EACH STATEMENT. ROTATE ORDER.

		Improved greatly	Improved slightly	Stayed the same	Slightly worsened	Greatly worsened	Don't know
The quality of service overall	(68)	1	2	3	4	5	6
The quality of customer service or account management	(69)	1	2	3	4	5	6
The choice of suppliers	(70)	1	2	3	4	5	6

Q35 NO Q 35

Q36 ASK ALL

Has your business ever used any IP telephony or VoIP services in particular? SINGLE CODE. (12)

Yes - currently use Go to Q38
 Yes - but stopped using Go to Q38
 No – but definitely planning to in the future Go to Q38
 No - never used Go to Q38
 Don't know Go to Q38

Q37 NO Q 37

Q38 ASK ALL

Now thinking about all your telecom services overall, does your company deal directly with specific account managers within your telecoms suppliers? SINGLE CODE. (14)

Yes - all suppliers1
 Yes - most suppliers2
 Yes - some suppliers3
 No suppliers4
 Don't know5

Q39 Do you use independent consultants or agencies (in addition to colleagues and any account managers within your telecoms suppliers) for support in the planning and management of your telecommunications services? SINGLE CODE

(15)
Yes.....1
No2
Don't know3

Q40 ASK ALL

Finally, please can you tell me have you noticed any areas that have particularly IMPROVED in the last 12 months relating to telecommunications?
(16-19)

Q41 ASK ALL

And is there anything (else) relating to telecoms that has become an important issue for your company?
(20-23)