

# Consumer research to inform market definition and market power assessments in the review of the wholesale broadband access markets 07

Research Document

Publication date: 15 November 2007

# Contents

Section		Page
1	Introduction	2
2	Internet service details	4
3	Claimed intention to switch given a price increase	14

## Section 1

# Introduction

## 1.1 Background to the research

This document outlines the research that was carried out to help inform Ofcom's market definition proposals within its second consultation for the "Review of the wholesale broadband access markets 2006/07."

The research was carried out for both residential and business consumers using the internet. The main focus of the research was asymmetric broadband usage and views relating to this amongst those who used either ADSL or cable as their method of connecting to the internet<sup>1</sup>. Research into the behaviour and views of consumers who use narrowband services was also carried out to provide useful context.

This research focussed on assessing potential switching behaviour if consumers were faced with 'small but significant non-transitory increases in price' (SSNIP) to inform market definition<sup>2</sup>. It follows on from previous research published in the original consultation document in November 2006. The latter research provides greater detail about specific aspects of internet service choice and the relative importance of individual aspects of a consumer's internet service.

The research was carried out between 29 January and 21 February 2007. See section 1.4 for full details on the methodology and annex 1 for the research questionnaires.

## 1.2 Research methodology

Fieldwork was carried out over the telephone using computer assisted interviewing (see annex 1 for the full questionnaire).

The residential consumer research resulted in 561 interviews with householders who were responsible for deciding on telecommunications and internet connections. Respondents were also recruited on the basis of their main internet connection at home; 361 respondents with ADSL broadband, 100 with cable broadband and 100 with narrowband.

The residential sample was identified via random digit dialling. Quotas were set and the sample was structured to ensure that it was broadly representative of UK consumers.

The business research sample comprised 348 interviews and was carried out with a person within each business who was responsible for deciding on telecommunication and internet connections. All were ADSL broadband users.

Quotas were used and the sample was structured to ensure robust coverage of UK businesses in terms of size and sector. Data was subsequently weighted to ensure the final data was generally representative of the market.

---

<sup>1</sup> Generally referred to as 'broadband users' throughout the research. Users of symmetric broadband (with similar upstream and downstream data transfer speeds) and leased lines are reported separately and when data on these consumers or subject is reported upon it is referred to specifically.

<sup>2</sup> The Hypothetical Monopolist Test (HMT) is a useful tool often used to identify close demand-side and supply-side substitutes in economic analysis of market definition. A product (or set of products) is considered to constitute a separate market if a hypothetical monopoly supplier could impose a small but significant, non-transitory increase in price (SSNIP) above the competitive level without losing sales to such a degree as to make this price rise unprofitable. If such a price rise would be unprofitable, because consumers would switch to other products, or because suppliers of other products would begin to compete with the hypothetical monopolist, then the market definition should be expanded to include the substitute products.

All research was carried out by Jigsaw Research Ltd.

Research data is reported with unweighted and weighted bases shown as appropriate. When data is reported with small sample sizes, results should be viewed as indicative only. The actual true value in the population will be within a given percentage of the figure indicated by the survey (either lower or higher than this). The size of this percentage varies by sample size and the degree of response (i.e. the more people that agree with a statement, the more likely the rest of the population will have a similar view). Table A1.1 shows the range that the true figure for the population will fall within, for different survey figures and different sample sizes (using a 95% significance level). For example, if a response amongst a sample of 100 respondents is 20% then the true result is likely to fall between 12% and 28% (that is + or – 8 percentage points).

**Table A1.1**

% Survey response	Base size		
	400	350	100
20%/80%	±4	±4	±8
35%/65%	±5	±5	±9
50%	±5	±5	±10

## Section 2

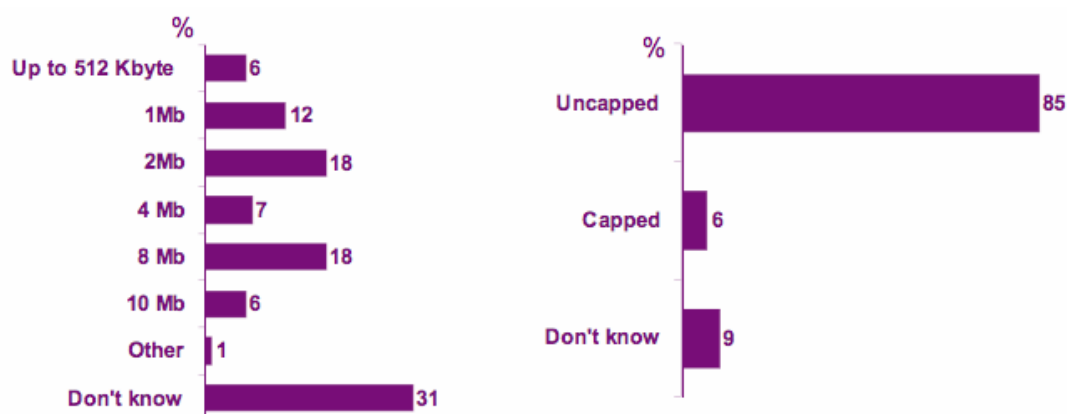
# Internet service details

In order to obtain background information consumers were asked general questions on the characteristics of their internet connections.

### Business ADSL customers

Three in ten business customers are unaware of their internet connection speed, with a spread of speeds amongst other firms. The large majority report having an uncapped package from their internet service provider.

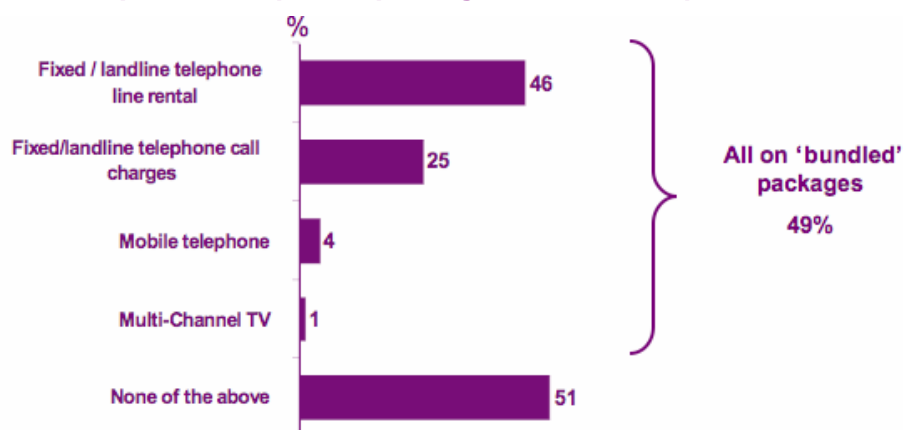
**Figure 1: Connection speed and type of package – business ADSL**



*Base: All business ADSL customers (unweighted 348/weighted 348)*

Half of business customers claim to be on a bundled package from their internet service provider, but they may be paying separately for their internet given that many can identify a specific price for their connection.

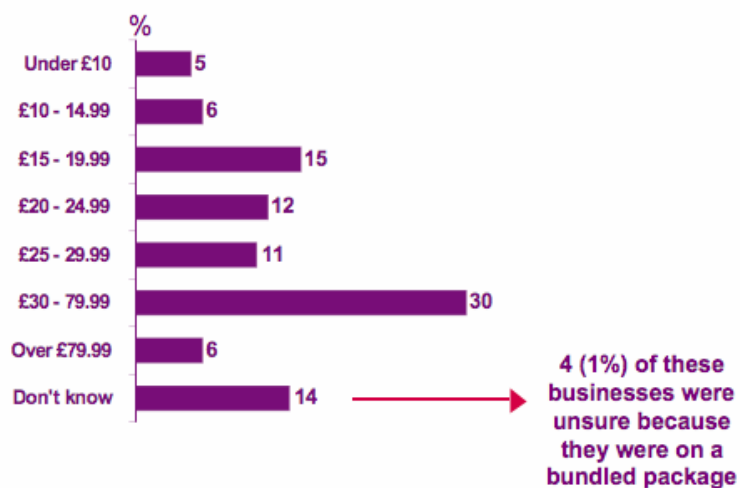
**Figure 2: Services paid for as part of package with internet provider – business ADSL**



*Base: All business ADSL customers (unweighted 348/weighted 348)*

Business customers tend to pay for their connection on a monthly basis (62%). When spend is averaged out on a monthly basis for all business customers, a diverse range of costs emerge. Most are able to mention a price, with the largest proportion spending between £30 and £79.99 a month

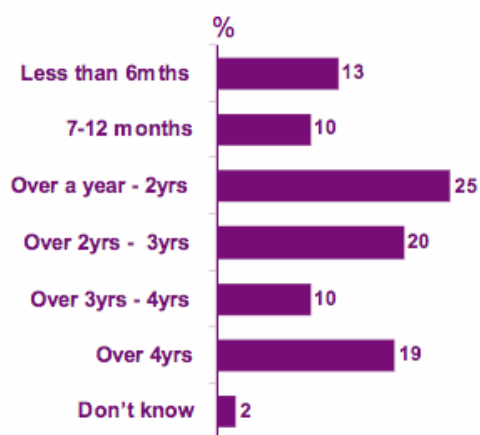
**Figure 3: Monthly spend on broadband internet (including VAT) – business ADSL**



*Base: All business ADSL customers (unweighted 348/weighted 348)*

Almost a quarter of business customers have had their ADSL broadband internet connection for a year or less, compared with a fifth who have had a broadband connection for more than four years.

**Figure 4: Length of time held current connection – business ADSL**



*Base: All business ADSL customers (unweighted 348/weighted 348)*

When prompted, most business customers are aware of at least one alternative form of internet connection available in their area. Most commonly this is a dial-up (88%) or ISDN (68%) connection, whilst 59% of those in cabled areas are aware of this as an alternative form of broadband connection.

**Figure 5: Awareness of connection types in area (prompted) – business ADSL**

<u>Survey Sample</u>	
<u>Unweighted base</u>	<b>(348)</b>
ADSL	100%
Dial-up connection	88%
ISDN	68%
Cable Broadband	52%
SDSL	39%
Satellite/Fixed Wireless	38%
Leased line	23%
None of the above	5%

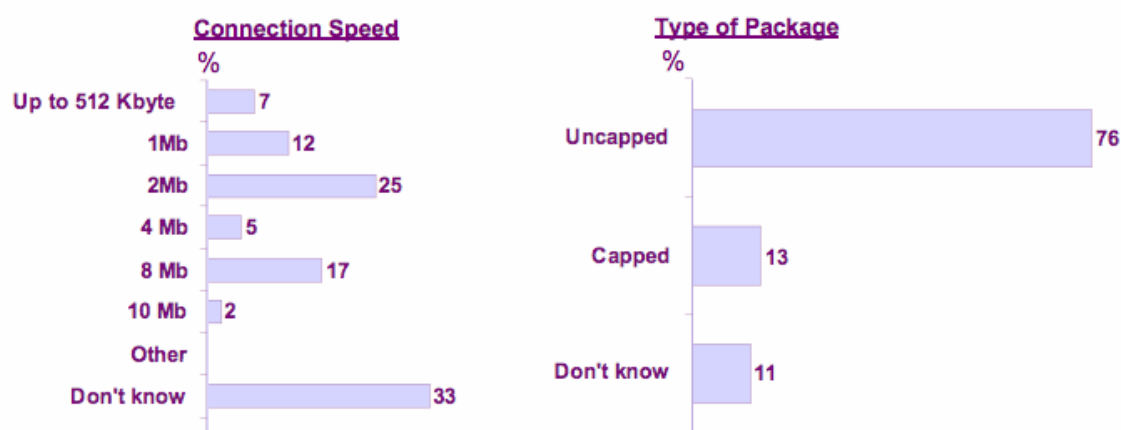
→ **59% of those in cabled areas**

Base: All business ADSL customers (unweighted 348/weighted 348)

## Residential ADSL customers

A third of residential ADSL users are unable to state the speed of their connection, whilst a quarter report they have a 2MB connection, and around a sixth an 8MB connection. Three-quarters say they have an uncapped package. There are no significant differences between cabled and non-cabled areas.

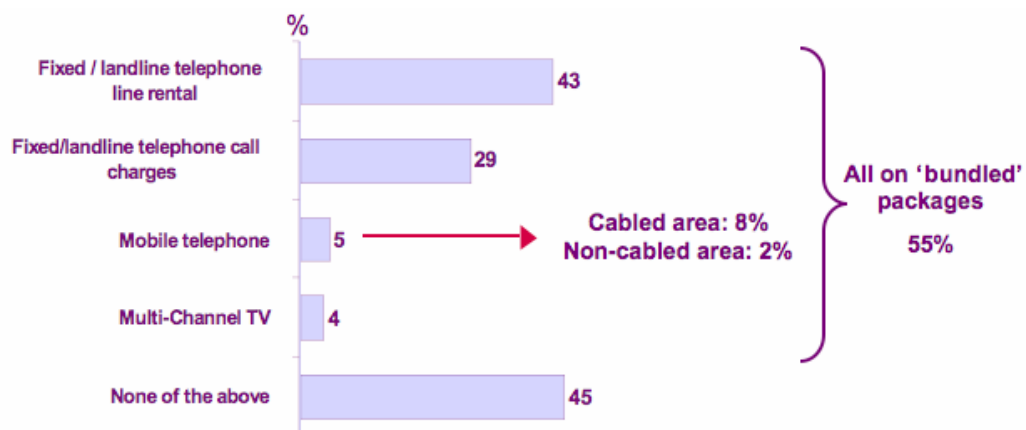
**Figure 7: Connection speed and type of package – residential ADSL**



Base: All residential ADSL customers (361)

More than half of residential ADSL customers report that they have a bundled package from their internet provider, but most can identify a separate price implying that many are paying for their internet connection separately. Indeed, 75% of BT ADSL customers regard their package as 'bundled' with fixed line rental.

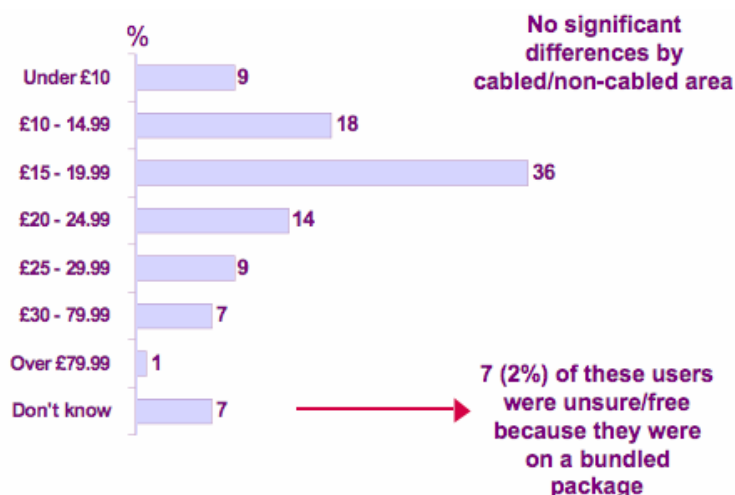
**Figure 7: Services paid for as part of package with internet provider – residential ADSL**



Base: All residential ADSL customers (361)

The large majority of residential ADSL customers pay for their broadband internet connection on a monthly basis (85%), with more than a third paying between £15 and £19.99 a month.

**Figure 8: Monthly spend on broadband internet (including VAT) – residential ADSL**

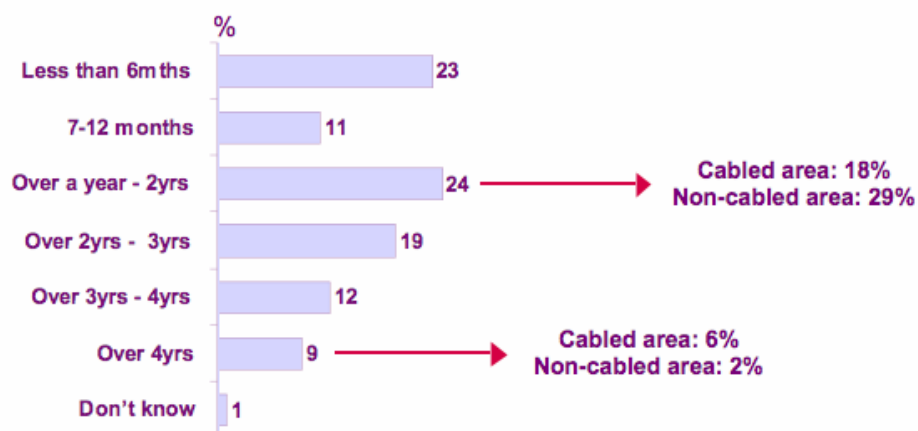


Base: All residential ADSL customers (361)



Around a third of residential ADSL customers have had their broadband connection for a year or less; fewer than one in ten have been connected for more than four years.

**Figure 9: Length of time held current connection – residential ADSL**



Base: All residential ADSL customers (361)

When prompted, most residential customers are aware of at least one alternative form of internet connection available in their area. Most commonly this is a dial-up connection (86%). Overall, respondents are as likely to mention a satellite or fixed wireless connection, as cable broadband, although almost half of those in cable areas are aware of the latter option.

**Figure 10: Awareness of connection types in area (prompted) – residential ADSL**

Survey Sample	
Base	(361)
ADSL	100%
Dial-up connection	86%
Satellite/Fixed Wireless	37%
Cable Broadband	36%
SDSL	23%
None of the above	7%

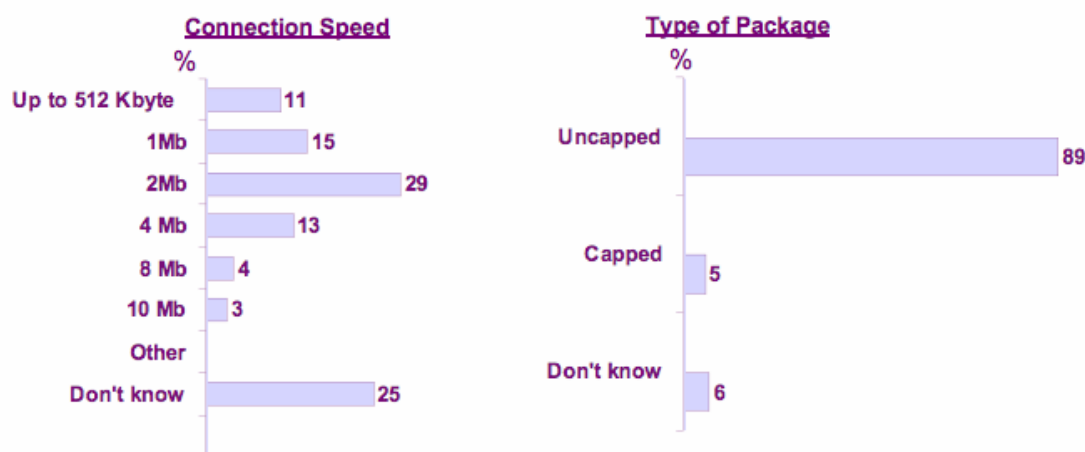
Callout for 'Cable Broadband': 48% of those in cabled areas

Base: All residential ADSL customers (361)

## Cable broadband customers

A quarter of cable broadband customers are unable to state their connection speed. Of the remainder, the largest proportion report a 2MB speed. Nine in ten say they have an uncapped package.

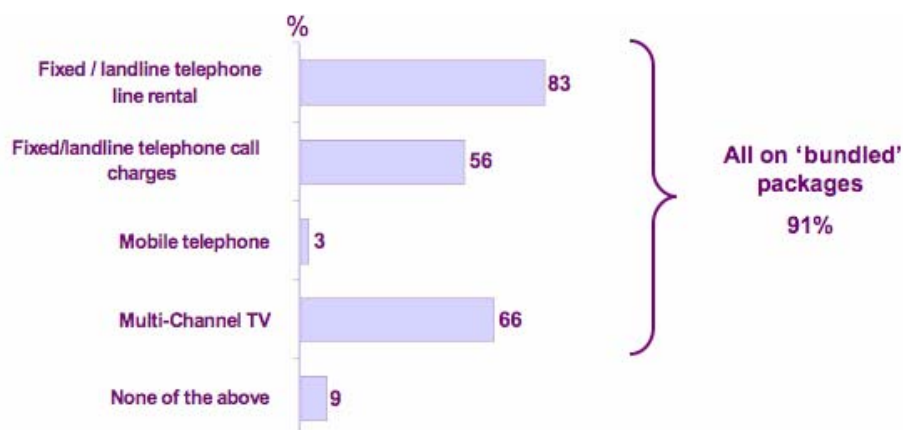
**Figure 11: Connection speed and type of package – cable broadband**



Base: All residential cable broadband customers (100)

The large majority of cable residential customers claim to be on bundled packages, most commonly with telephone line rental and/or multi-channel TV, but some may be paying for their broadband connection separately since they can identify a specific price.

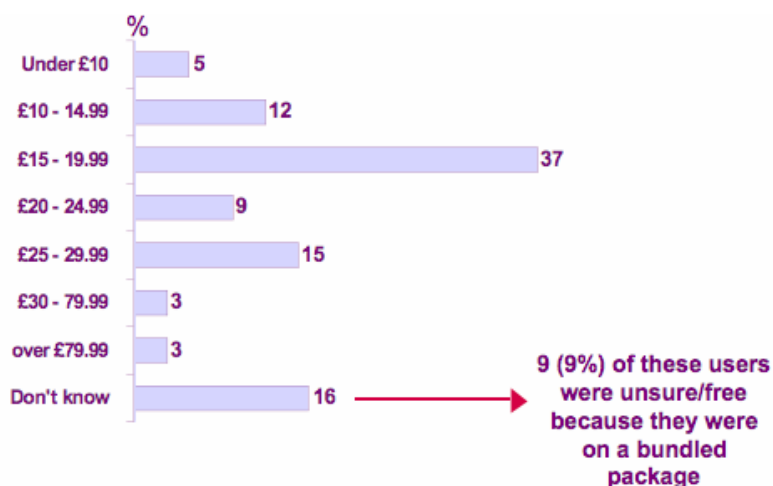
**Figure 12: Services paid for as part of package with internet provider – cable broadband**



Base: All residential cable broadband customers (100)

Almost all residential customers pay their bills monthly (98%), with more than third paying between £15 and £19.99 for their broadband connection.

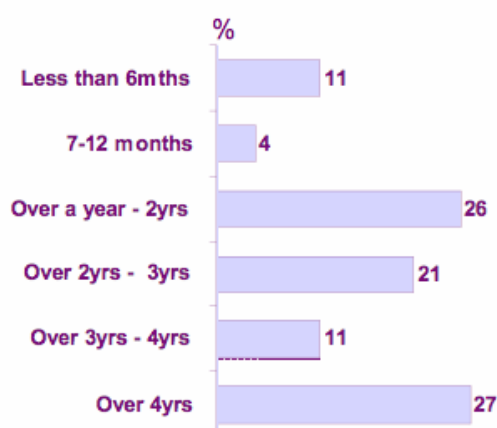
**Figure 13: Monthly spend on broadband internet (including VAT) – cable broadband**



*Base: All residential cable broadband customers (100)*

Residential cable customers tend to have had their broadband internet connections for longer than residential ADSL customers, more than a quarter having had their connection for more than four years.

**Figure 14: Length of time held current connection – cable broadband**



*Base: All residential cable broadband customers (100)*

When prompted, most residential cable broadband customers are aware of at least one alternative form of internet connection in their area. Most commonly this is ADSL (86%) or dial-up (77%).

**Figure 15: Awareness of connection types in area (prompted) – cable broadband**

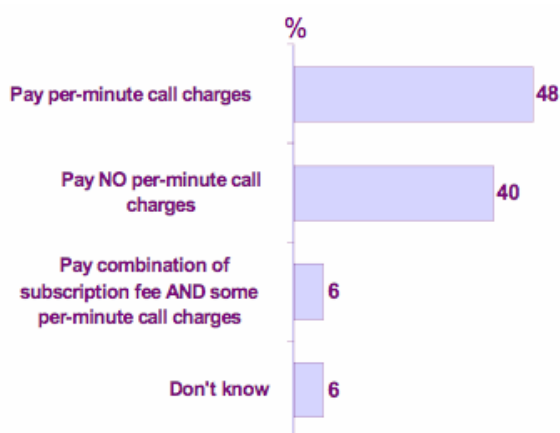
<i>Survey Sample</i>		
Base	(100)	
Cable	100%	→ 91% in a cabled area
Dial-up connection	77%	
ADSL	86%	
SDSL	33%	
Satellite/Fixed Wireless	44%	
None of the above	5%	

*Base: All residential cable broadband customers (100)*

## Narrowband customers

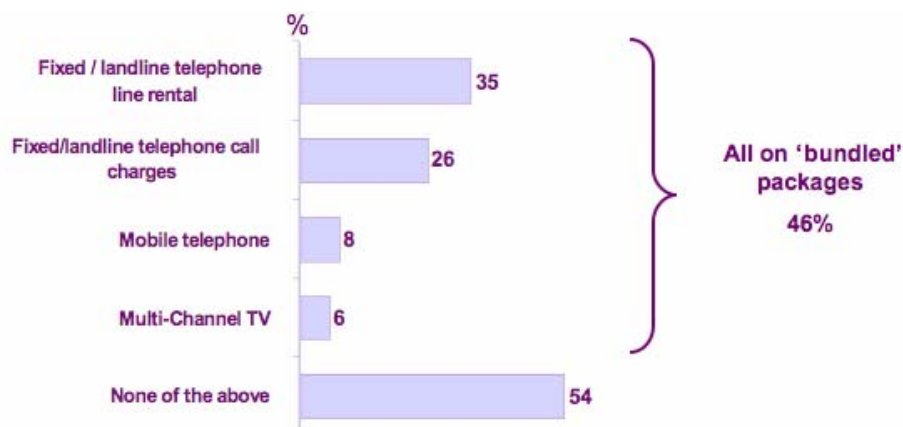
When asked how they pay for their narrowband connection, residential narrowband users are broadly split between those who pay per-minute charges, and those who pay no per-minute charges. Figure 17 shows that nearly half claim to receive their narrowband connection as part of a bundled service, although they may be paying separately for the service given that many can name a specific price for their internet connection.

**Figure 16: Package type – narrowband**



*Base: All residential narrowband customers (100)*

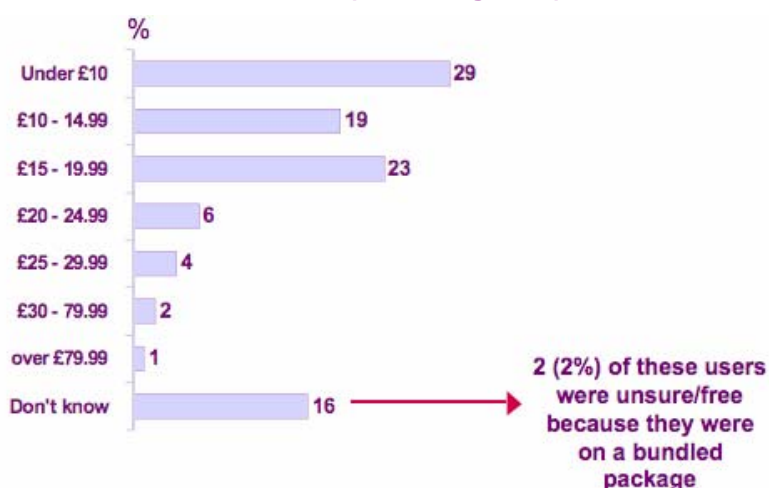
**Figure 17: Services paid for as part of package with internet provider – narrowband**



Base: All residential narrowband customers (100)

Three-quarters of residential narrowband customers pay for their internet connection through a monthly bill (76%), with the majority spending under £20 a month.

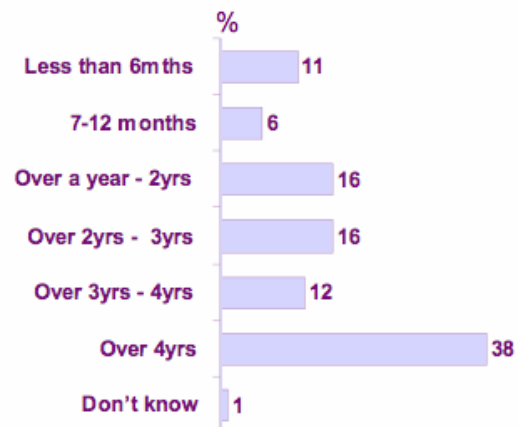
**Figure 18: Monthly spend on internet connection (including VAT) – narrowband**



Base: All residential narrowband customers (100)

Residential narrowband customers are the most likely to have used the same connection for a significant period of time. Almost four in ten have had narrowband internet for more than four years.

**Figure 19: Length of time held current connection – narrowband**



*Base: All residential narrowband customers (100)*

When prompted, most residential narrowband customers are aware of at least one alternative form of internet connection in their area. Most commonly this is ADSL (84%), although seven in ten of those in cabled areas are aware of a cable broadband alternative.

**Figure 20: Awareness of connection types in area (prompted) – narrowband**

<u>Survey Sample</u>	
<b>Base</b>	<b>(100)</b>
Dial-up connection	100%
ADSL Broadband	84%
Cable Broadband	30%
Satellite/Fixed Wireless	24%
SDSL	11%
None of the above	11%

→ 71% of those in a cabled area

*Base: All residential narrowband customers (100)*

## Section 3

# Claimed intention to switch given a price increase

This section focuses on consumers' *claimed* likely responses to a hypothetical increase in the price of internet access.

It should be noted that this section identifies the responses *reported* by consumers, however consumers' *actual* behaviour when faced with an increase in price may not be as they claim or predict (e.g. some of those that say they would switch internet connection type or would stop using the internet may not actually do this if faced with an increase in price for a variety of possible reasons e.g. the time/effort of organising a change in service or a lack of feasible alternatives on investigation of their options).

### 3.1 Questions asked

The research asked a variety of questions which focused on different 'small but significant non-transitory increases in price' (SSNIP) scenarios.

Building on the research for the earlier Broadband Market Review consultation document (published in November 2006), broadband and narrowband customers were asked what they would do in response to a price rise in their own service, and an additional question that related to a price rise across a wider set of services. These are described in the following scenarios:

**Scenario A:** asked of all except those on 'bundled' packages who do not know the price of their package/free.

You've told me that you use [service] to access the internet. Now I'd like you to imagine that the price of all [same services] from all suppliers in the market including your own went up by 10%. This means that you would not be able to avoid the price increase by switching to alternative suppliers of [same service]. What would you be most likely to do?

**Scenario B:** asked of all, except narrowband residential customers, saying they would change to different way of accessing the internet at Scenario A and know what connection type they would switch to.

I'd now like to know which of the following courses of action you would consider if the price of all the internet connection packages using either [existing service] or [service most likely to switch to] were to rise by 10% per month. This means you would not be able to avoid the price increase by switching to alternative suppliers of [service most likely to switch to]. What would you be most likely to do?

**Scenario C:** asked of all on 'bundled' packages who do not know the price of their package or stated it is free.

You've told me that you use [service] to access the internet. Now I'd like you to imagine that the price of all [same services] from all suppliers in the market went up by 10% and your current provider followed suit by introducing a price rise of £1.50-£2.50 on your current package of [all services in 'bundled' package]. That means that the price of your current service package would now be higher because other providers of [same services] will have also raise their prices, therefore you wouldn't be any better off than before the price rise in changing to a different broadband provider. What would you be most likely to do?

Subsequent questions after each scenario asked the customer about their likelihood of actually making the change in reaction to a SSNIP, and double-checked that they would switch to a different way of providing internet access rather than a different supplier of the same type of connection.

Very few respondents were asked Scenario C, given that most could state the price of their internet connection even when part of a 'bundled' package. Since the sample sizes were too small for rigorous analysis, it has not been reported here.

For the full question wording and details explained to consumers see annex 1. The results are outlined below.

### 3.2 Summary of reactions to Scenario A

The table below sets out a summary of reactions to Scenario A, a 10% SSNIP on the customer's current internet connection.

<i>Base</i>	BUSINESS ADSL (343 unweighted, 343 weighted)	CONSUMER ADSL BROADBAND (354)	CONSUMER CABLE BROADBAND (91)	CONSUMER NARROWBAND (98)
<b><u>SSNIP Response</u></b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>
Stay	80	71	77	64
Switch	9	19	15	29
Other	5	3	3	0
Don't know	5	6	4	7
<b><u>Switch To:</u></b>	<b>#</b>	<b>#</b>	<b>#</b>	<b>#</b>
Dial-up	2	7	1	0
ADSL broadband	0	0	2	13
Cable broadband	7	16	0	6
SDSL	2	3	1	1
Sat/Fixed Wireless	5	27	6	1
Other	3	4	0	0
Don't know	12	10	4	7
<b><u>Likely Behaviour</u></b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>
Certain to	42	35	37	32
Very likely to	28	33	28	29
Fairly likely to	24	27	31	36
Fairly unlikely to	2	2	0	0
Very unlikely to	2	1	1	0
Certain not to	1	0	0	1
Don't know	1	2	3	2

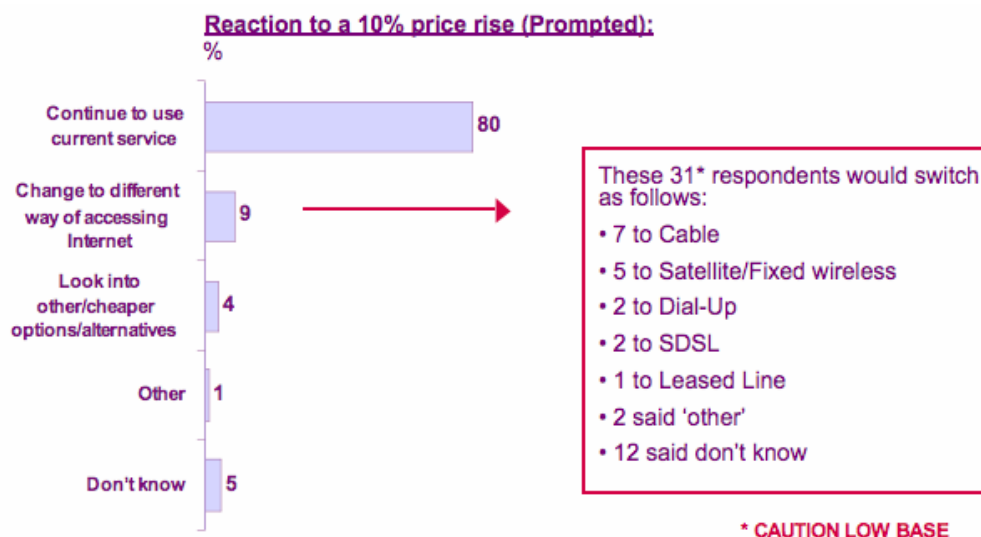
These are examined in more detail in the following sections.



### 3.3 Business ADSL customers

If faced with a 10% SSNIP on their existing broadband connection, eight in ten business ADSL customers would continue with their existing services. Of the one in ten who say they would change to a different connection type, more than a third were unable to identify the alternative they would choose.

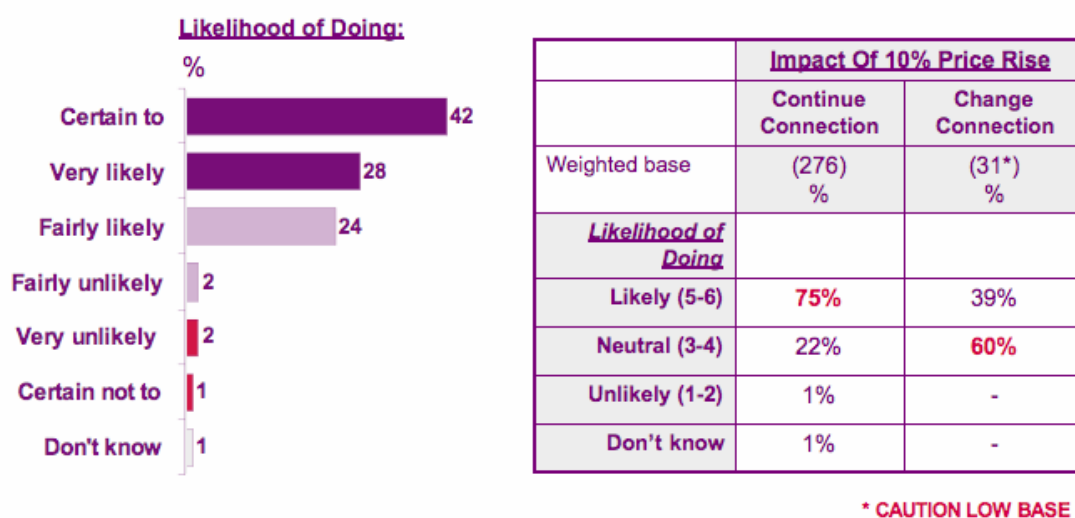
**Figure 21: Responses to Scenario A (10% increase in price of current connection) – business ADSL**



Base: All business ADSL customers excluding those on bundled packages who don't know their spend, or state that their internet connection is free (unweighted 343/weighted 344)

When probed, 39% of potential switchers say they are likely<sup>3</sup> to take this course of action – whereas 75% of non-switchers are likely to stay.

**Figure 22: Likelihood of taking action stated in Scenario A – business ADSL**

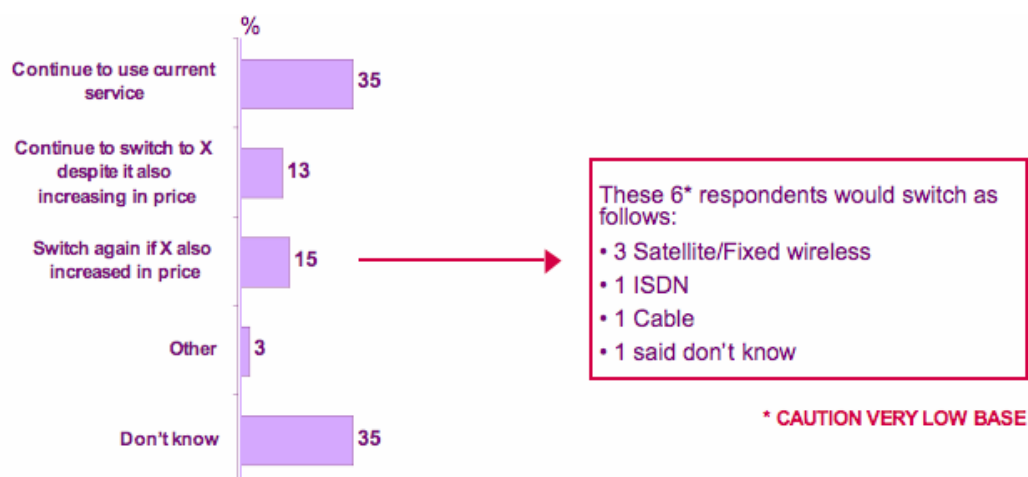


Base: All business ADSL customers who know how they would react to Scenario A (unweighted 323/weighted 325)

<sup>3</sup> 'Certain to' or 'very likely' to take action

Those who say they would switch in response to a 10% price in their current internet connection were asked Scenario B, a 10% increase in the price of both their current connection method, and the one to which they would change. Stated behaviour amongst this small group of customers is mixed with no one option standing out, although three in five are likely to make this choice (60%).

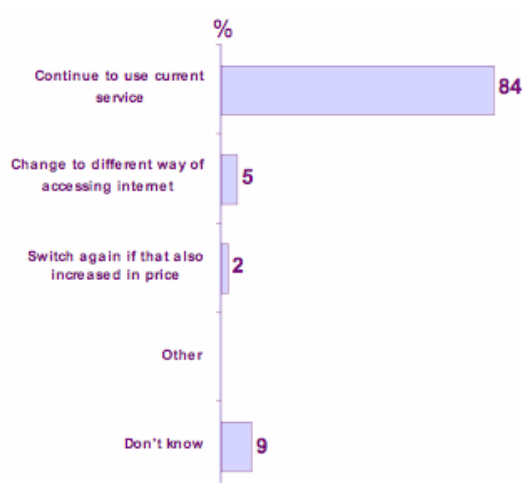
**Figure 23: Responses to Scenario B (10% increase in price of current and potential new connection) – business ADSL**



*Base: All business ADSL customers who would not stay with their current connection method in Scenario A (unweighted 44/weighted 37)*

Figure 24 shows that, when business ADSL customers' responses to Scenarios A and B are combined, 84% would remain on their current internet connection; 5% would change to another way of accessing the internet, and a further 2% would switch again if the price of that substitute increased.

**Figure 24: Combined responses to Scenarios A and B – business ADSL**

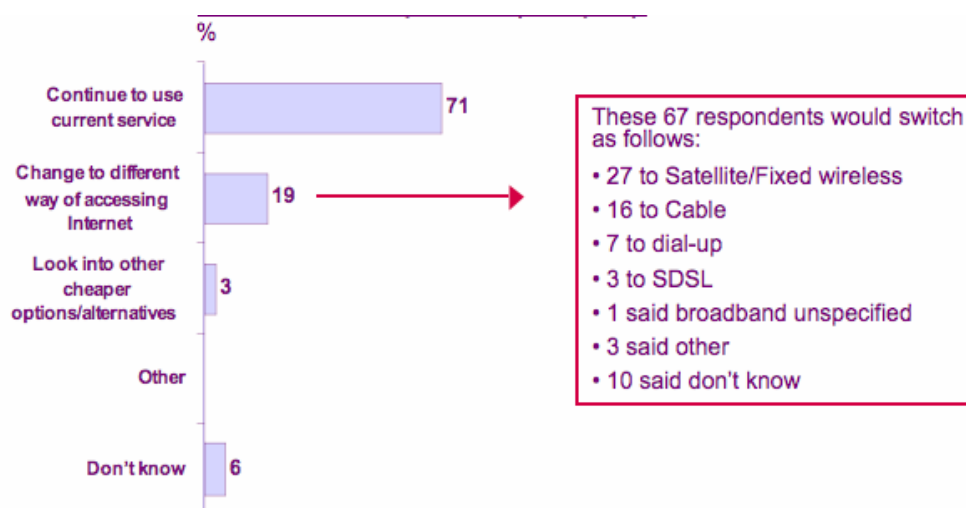


*Base: All business ADSL customers excluding those on bundled packages who don't know their spend, or state that their internet connection is free (unweighted 343/weighted 344)*

### 3.4 Residential ADSL customers

If faced with a 10% SSNIP on their existing broadband connection, seven in ten residential ADSL customers would continue with their existing services, whilst two in ten would switch to a different way of accessing the internet. There are no significant differences between customers in cabled and non-cabled areas.

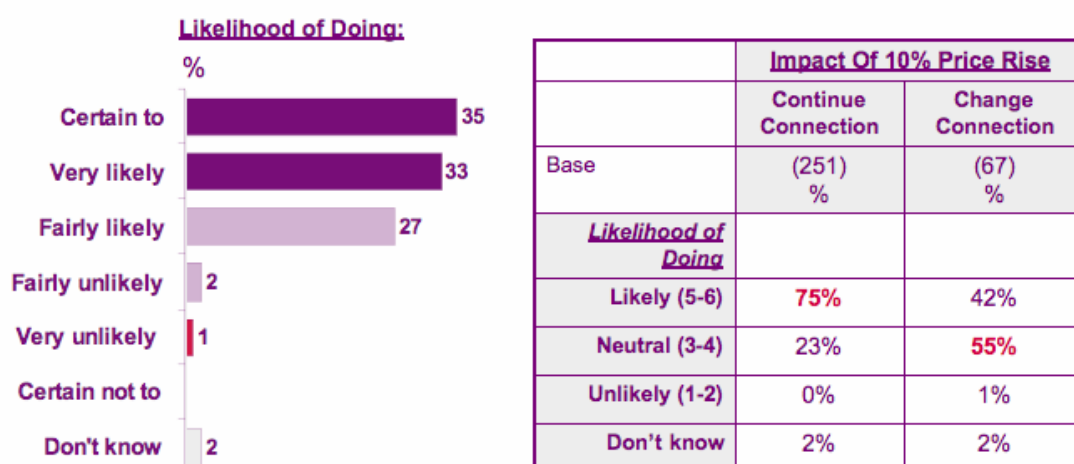
**Figure 25: Responses to Scenario A (10% increase in price of current connection) – residential ADSL**



*Base: All residential ADSL customers excluding those on bundled packages who don't know their spend, or state that their internet connection is free (354)*

When probed, 42% of potential switchers say they are likely to take this course of action – whereas 75% of non-switchers are likely to stay. Again, there are no significant differences between cabled and non-cabled areas.

**Figure 26: Likelihood of taking action stated in Scenario A – residential ADSL**



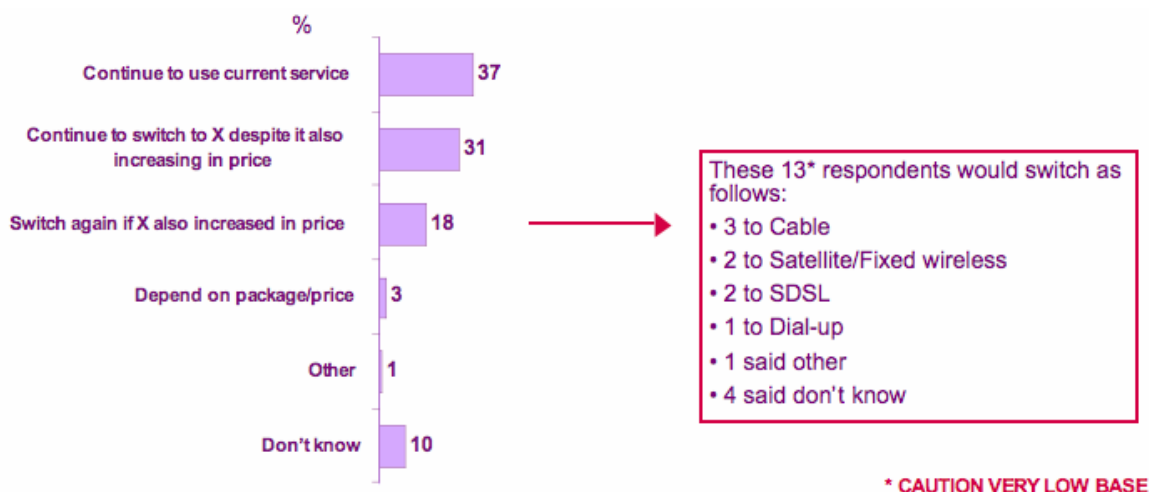
*Base: All residential ADSL customers who know how they would react to Scenario A (332)*

Those who say they would switch in response to a 10% price in their current internet connection were asked Scenario B, a 10% increase in the price of both their current connection method, and the one to which they would change. In this situation 37% would

remain on their current connection and 31% would switch to the substitute identified in Scenario A, whilst 18% would switch again to a second alternative.

Just over half (52%) are likely to take this action, with a greater level of confidence in non-cabled versus cabled areas (35% versus 13% certain, based on small sample sizes).

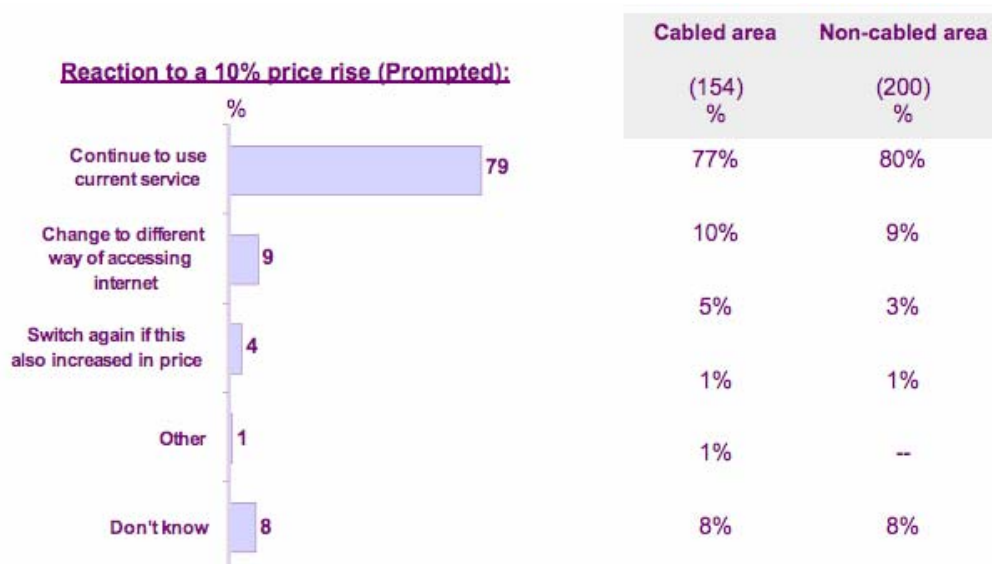
**Figure 27: Responses to Scenario B (10% increase in price of current and potential new connection) – residential ADSL**



Base: All residential ADSL customers who would not stay with their current connection method in Scenario A (71)

Figure 28 shows that, when residential ADSL customers' responses to Scenarios A and B are combined, 79% would remain on their current internet connection; 9% would change to another way of accessing the internet, and a further 4% would switch again if the price of that substitute increased. There are no significant differences between cabled and non-cabled areas.

**Figure 28: Combined responses to Scenarios A and B – residential ADSL**

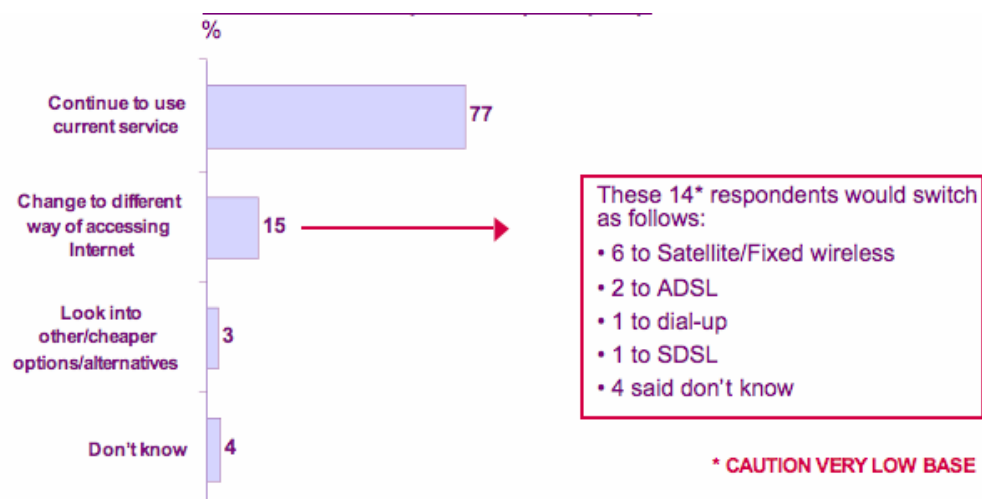


Base: All residential ADSL customers excluding those on bundled packages who don't know their spend, or state that their internet connection is free (354)

### 3.5 Residential cable customers

If faced with a 10% SSNIP on their existing cable internet connection, three-quarters of residential cable broadband customers would continue with their existing services, whilst 15% would switch to a different way of accessing the internet.

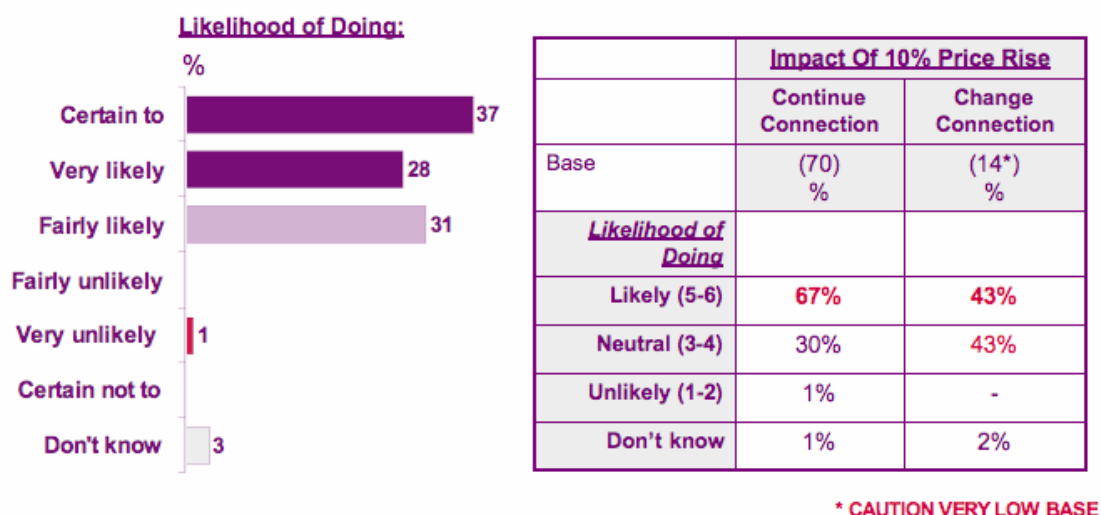
**Figure 29: Responses to Scenario A (10% increase in price of current connection) – residential cable**



Base: All residential cable customers excluding those on bundled packages who don't know their spend, or state that their internet connection is free (91)

When probed, two-thirds of cable broadband customers are likely to take the action stated at Scenario A. (Note that the base size for switchers here is very small.)

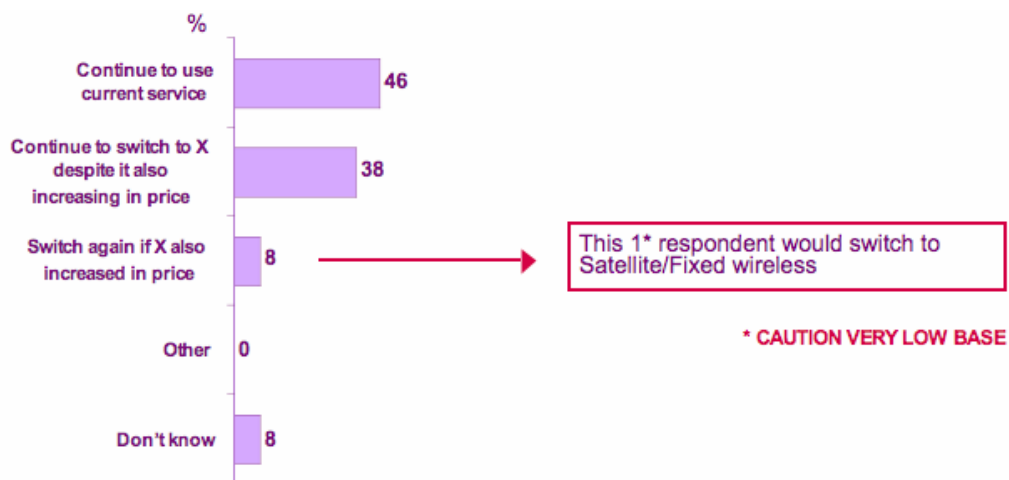
**Figure 30: Likelihood of taking action stated in Scenario A – residential cable**



Base: All residential cable customers who know how they would react to Scenario A (87)

Those who say they would switch in response to a 10% price in their current internet connection were asked Scenario B, a 10% increase in the price of both their current connection method, and the one to which they would change. Amongst this very small sample of 13 respondents, there is a spread of opinions. Almost half would continue to use their current cable service, whilst one respondent states they would switch again to a different substitute.

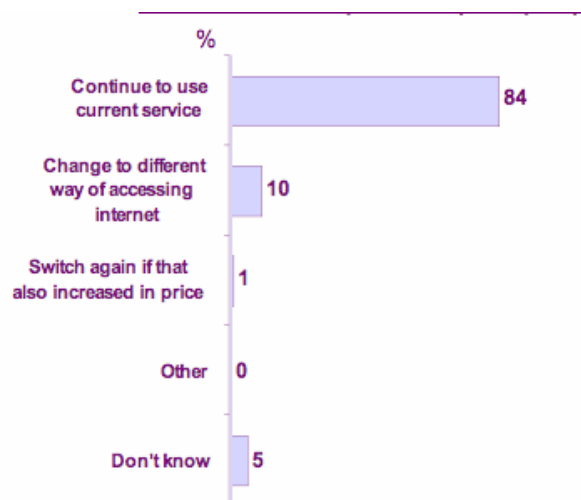
**Figure 31: Responses to Scenario B (10% increase in price of current and potential new connection) – residential cable**



*Base: All residential cable customers who would not stay with their current connection method in Scenario A (13)*

Figure 32 shows that, when residential cable broadband customers' responses to Scenarios A and B are combined, 84% would remain on their current internet connection; 10% would change to another way of accessing the internet, and a further 1% would switch again if the price of that substitute increased.

**Figure 32: Combined responses to Scenarios A and B – residential cable**

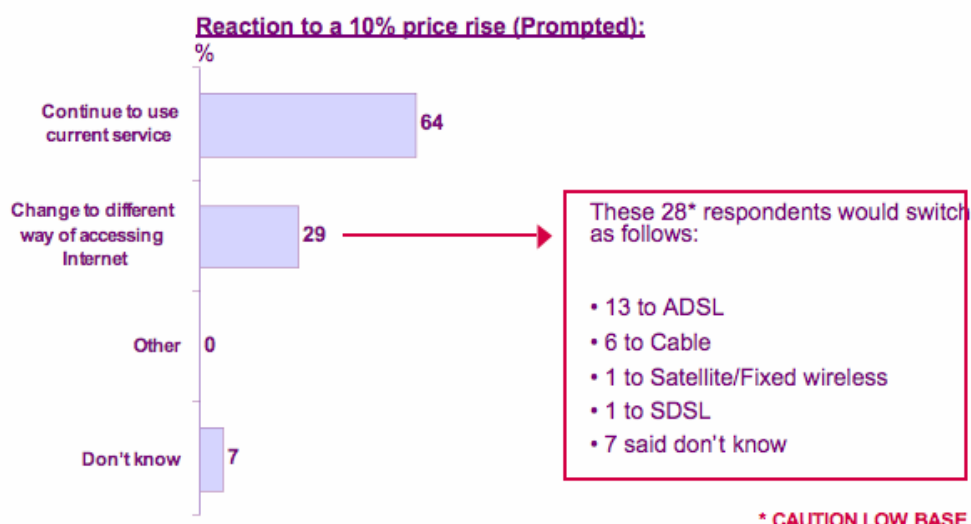


*Base: All residential cable customers excluding those on bundled packages who don't know their spend, or state that their internet connection is free (91)*

### 3.6 Residential narrowband customers

If faced with a 10% SSNIP on their existing narrowband internet connection, three in ten narrowband customers would switch to a substitute connection, whilst more than six in ten would continue to use their current service.

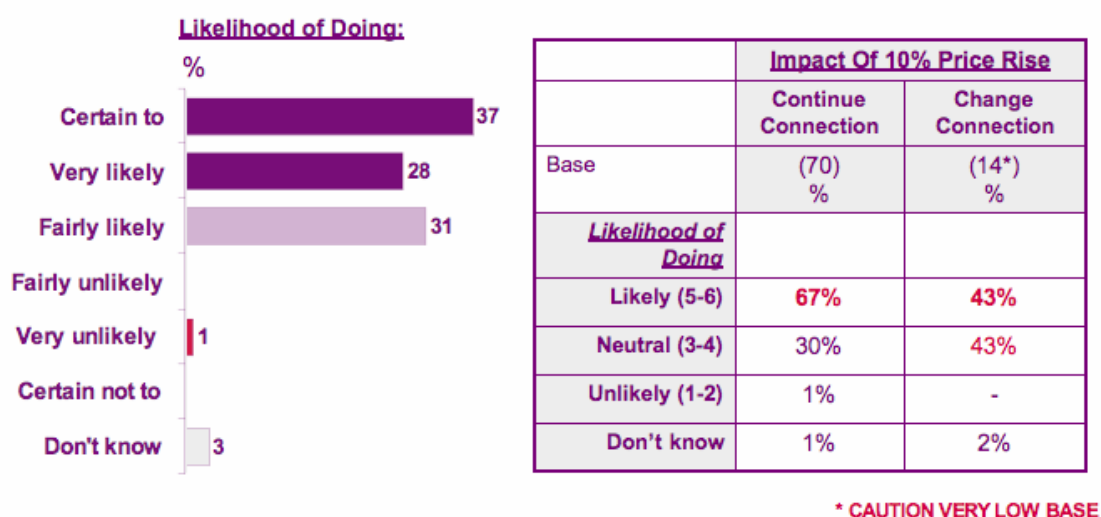
**Figure 33: Responses to Scenario A (10% increase in price of current connection) – residential narrowband**



*Base: All residential narrowband customers excluding those on bundled packages who don't know their spend, or state that their internet connection is free (98)*

When probed, six in ten say they would be likely to take the action stated in Scenario A, including five in ten of those who say they'd switch.

**Figure 34: Likelihood of taking action stated in Scenario A – residential narrowband**



*Base: All residential narrowband customers who know how they would react to Scenario A (91)*

## Annex 1

# Research questionnaire

Good morning/afternoon, my name is \_\_\_\_\_ from Jigsaw Research. Please could I speak to the person within the organisation who has primary responsibility for telecoms and other communications services, including Internet services?

### INTRODUCTION TO RESPONDENT:

Good morning/afternoon, my name is \_\_\_\_\_ from Jigsaw Research. We are conducting a study on behalf of Ofcom, the regulator for the communications industries in the UK that aims to champion the interests of <<businesses/consumers>> on these issues. Ofcom currently needs to understand how <<businesses/people>> make decisions about how to use communications technology. Could I ask you some questions?

### READ AS REQUIRED:

The interview will take no more than 10 minutes depending on your responses.

Part of the study requires us to ensure that we interview many <<different types of UK businesses so the first few questions about your company are purely to ensure that we get a true cross-section of UK industry/different types of people so the first few questions about your household are purely to ensure that we get a true cross-section of the UK population>>.

### SCREENER QUESTIONS BUSINESS

QA. Which of the following best describes your involvement with purchasing decisions regarding your company's telecoms and other communications services such as Internet services. Are you (READ OUT)? SINGLE CODE

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

### ONCE THROUGH TO RIGHT PERSON:

QB. Could I please confirm your exact job title? SINGLE CODE

Owner / Proprietor  
Partner / Managing Partner  
Chief Executive Officer  
Chief Finance Director / Finance Director  
Chief Operations Director / Operations Director  
Managing Director  
IT / Telecoms Director / Manager  
Other senior manager  
PA / Office manager  
Other (**WRITE IN**)



QC. Which of the following industry sectors does your business operate in?

**READ OUT ENTIRE LIST TO RESPONDENT BEFORE CODING. SINGLE CODE**

1. Manufacturing
2. Mining, quarrying
3. Agriculture
4. Construction
5. Utilities
6. Retail or wholesale
7. Distribution, transport or storage
8. Leisure
9. Finance, banking, insurance
10. Professions e.g. law firms, architects, solicitors, doctors etc.
11. Market research/marketing/advertising/PR ..... **CLOSE**
12. Communications/IT/telecoms/new media..... **CLOSE**
13. Other business services

Other (**WRITE IN**)

**CODE INTO ONE OF THE FOLLOWING THREE CATEGORIES ACCORDING TO ANSWER ABOVE FOR QUOTA PURPOSES ONLY**

**Manufacturing = 1, 2, 3, 4, 5**

**Wholesale/retail/distribution = 6, 7, 8**

**Services = 9, 10, 13**

<b>SAMPLE TO EXCLUDE GOVERNMENT/PUBLIC SERVICES AND EDUCATION (i.e. those with the US SIC code 82, 91, 92 or 97)</b>
--

QD. Including yourself, how many people does your business currently employ in the UK either full or part time? WRITE IN NUMBER TO NEAREST THOUSAND USING LEADING ZEROS (MINIMUM VALUE = 1).

IF NECESSARY READ OUT LIST AND SINGLE CODE ACCORDINGLY

- 1, you are a sole trader
- 2, you plus one partner or employee
- 3-5
- 6-10
- 11-25
- 26-50
- 51-100
- 101-200
- 201-250
- 251- 500
- Over 500
- Don't know
- Refused

QE. And how long has your business been trading? SINGLE CODE

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

QF. Does your organisation have access to the Internet for business purposes? SINGLE CODE

- Yes..... **CONTINUE**
- No ..... **CLOSE**
- Don't know ..... **CLOSE**

QG. By which of the following means does your business currently connect to the Internet? Please just tell me your **main** way of connecting if you have more than one method. Is it...? READ OUT. SINGLE CODE

**NOTE FOR INTERVIEWER** IF REQUIRED: By main, I mean the most frequently used internet connection in your business.

**NOTE FOR INTERVIEWER:** THE RESPONDENT NEEDS TO BE ABSOLUTELY CLEAR ON THE DISTINCTION BETWEEN FIXED WIRELESS BROADBAND ACCESS AND BROADBAND VIA DSL (E.G. OPTION 6 VERSUS OPTION 3). THE KEY THING IS HOW THE CONNECTION IS DELIVERED TO THEIR OFFICE. IF THEY HAVE A WIRELESS ROUTER OR CONNECTION WITHIN THEIR OFFICE BUT THEY RECEIVE THE BROADBAND TO THEIR OFFICE VIA A FIXED LINE THEY WOULD STILL BE OPTION 3.

1. Dial-up using a normal telephone line and a standard 56K modem..... **CLOSE**
2. ISDN line ..... **CLOSE**
3. Broadband access delivered to your office via DSL (i.e. delivered to your office via your phone lines - ADSL or SDSL - although you may have a wireless router or connection in your office) .. **Continue to QH**
4. Broadband access via cable modem..... **CLOSE**
5. Leased line ..... **CLOSE**
6. Broadband via satellite, or fixed wireless access; this delivers broadband to your office using radio links between an aerial located on the outside of your premises and the internet providers base station, rather than using a telephone line or a cable provider's network to deliver it to the office ..... **Continue to QH**
7. Other ..... **CLOSE**
8. Don't know ..... **CLOSE**

QH. Is that asymmetric (e.g. ADSL) broadband or symmetric (e.g. SDSL) broadband? SINGLE CODE. READ OUT IF NECESSARY

1. Asymmetric (IF UNSURE SAY: i.e. has faster download than upload speeds) **CONTINUE**
2. Symmetric (IF UNSURE SAY: i.e. has similar upload and download speeds). **CLOSE**
- Don't know ..... **IF DON'T KNOW ASSUME FOR PURPOSES OF FUTURE ROUTING THAT ARE ADSL ie CONTINUE**

QI. In which of the following areas of the UK is your business based?  
If there are multiple offices or branches, please tell me where the business head office is located? READ OUT.  
SINGLE CODE

North East England  
North West England  
Yorkshire and the Humber  
East Midlands  
West Midlands  
East England  
London  
South East England  
South West England  
Wales  
Scotland  
Northern Ireland  
Don't know  
Refused

QJ. RECORD POSTCODE (OF HEAD OFFICE IF MULTIPLE OFFICES)

NB PLEASE RECORD POSTCODE AS ACCURATELY AS POSSIBLE AS THIS WILL BE USED IN ANALYSIS

QK. As far as you are aware, which of these options would be available to you in your area if you wanted them?  
MUTLTICODE. READ OUT. DO NOT SHOW/READ OUT THE OPTION CURRENTLY ON AT QG-H

Dial-up using a normal telephone line and a standard 56K modem.....  
ISDN line  
ADSL broadband access delivered to your office via fixed line  
Broadband access via cable  
SDSL broadband access (i.e. symmetric access with similar upload and download speeds)  
Leased line  
Broadband via satellite, or fixed wireless access (IF NECESSARY: this delivers broadband to your office using radio links between an aerial located on the outside of your premises and the internet providers base station, rather than using a telephone line or a cable television network to deliver it)  
None of the above

# **SCREENER QUESTIONS RESIDENTIAL**

QA. Which of the following best describes your involvement with purchasing decisions regarding your household's telecoms services? Are you (READ OUT)? SINGLE CODE

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

QB. And which of the following age bands do you fall into? READ OUT. SINGLE CODE

Under 18 .....**CLOSE**  
18-24  
25-34  
35-44  
45-54  
55-64  
65+  
Refused

QC. Please could you tell me the occupation of the chief income earner in your household

# **WRITE IN AND THEN CODE SOCIO ECONOMIC GRADE BELOW**

## **SINGLE CODE. DO NOT READ OUT**

A/B  
C1  
C2  
D/E

QDi. Do you or does anyone else in your household have access to the Internet at home, whether that is via computer, the TV, a mobile phone or any other method? SINGLE CODE

Yes.....**CONTINUE**  
No .....**CLOSE**  
Don't know .....**CLOSE**

QDii. Is this primarily for personal household use, business use or both? SINGLE CODE

Primarily personal household .....**CONTINUE**  
Primarily business.....**CLOSE**  
Both .....**CONTINUE**  
Don't know .....**CONTINUE**

QE. Do either you or someone in your household pay the bill for your Internet services, or is your bill paid by the company you work for? SINGLE CODE

Pay own bill.....	<b>CONTINUE</b>
Company pays bill .....	<b>CLOSE</b>
Don't know .....	<b>CLOSE</b>

QF. By which of the following means do you currently connect to the Internet? Please just tell me your main way of connecting if you have more than one method. Is it...? READ OUT. SINGLE CODE

INTERVIEWER NOTES (DO NOT SHOW ON SCREEN):

ISDN: This is a dedicated line that usually has to be installed by an engineer and is separate to the telephone line you have for making voice calls. If you have this you can make telephone calls at the same time as using the Internet, but you dial-up to connect with this.

BROADBAND: With broadband access your connection is faster than dial up, "always on" and you can use a telephone at the same time. People can have a wireless access in their home (using wireless routers) and still be ADSL/Cable broadband – the important thing is how the connection is delivered to their home (i.e delivered via telephone line or a cable television network to the house).

SATELLITE OR FIXED WIRELESS: this delivers broadband to your home using radio links between an aerial located on the outside of your house and the internet providers base station, rather than using a telephone line or a cable television network.

1. Dial-up using a normal telephone line and a standard 56K modem
2. Access via ISDN line
3. Broadband access delivered to your home either via cable or through a fixed telephone line (although once in the home your computer may use a wireless connection/router so that you can access the internet without cables, the important thing is how the connection is delivered to your home – i.e. it is delivered via telephone line or a cable television network to the house)
4. Broadband via satellite or fixed wireless broadband; this delivers broadband to your home using radio links between an aerial located on the outside of your house and the internet providers base station, rather than using a telephone line or a cable television network. ....
5. Other..... **CLOSE**
6. Don't know (Don't read out)..... **CLOSE**

IF CODE 3 AT QF ASK QG-I. OTHERS SKIP TO QJ

QG. Which of the following types of broadband access do you have? READ OUT. SINGLE CODE

1. Broadband access via a BT or other telephone line, also known as ADSL.
2. Broadband access via cable companies such as NTL/Telewest using a cable modem
3. Don't know (Don't read out)

ASK QH IF CODE 1 or 3 AT QG

QH. Most people have faster download speeds on their broadband than uploading speeds, do you know if that is true for you? SINGLE CODE

1. Yes - have faster download than upload speeds (Asymmetric) = **CONTINUE**
2. No - have similar upload and download speeds (Symmetric) = **CLOSE**
3. Don't know .....**CONTINUE (IF DON'T KNOW ASSUME FOR PURPOSES OF FUTURE ROUTING THAT ARE ADSL)**

<b>QUOTA GROUPS:</b>	
<b>Code 1, 2 AT QF</b>	<b>Narrowband = 100 interviews</b>
<b>(Code 3 AT QF) and (Code 1 AT QG) OR (Code 3 AT QF) and (Code 3 AT QG) and (Code 1 or 3 AT QH)</b>	<b>ADSL Broadband = 300 interviews</b>
<b>(Code 3 AT QF) and (Code 2 AT QG)</b>	<b>Cable Broadband = 100 interviews</b>

QJ In which of the following areas of the UK do you live? READ OUT. SINGLE CODE

North East England  
North West England  
Yorkshire and the Humber  
East Midlands  
West Midlands  
East England  
London  
South East England  
South West England  
Wales  
Scotland  
Northern Ireland  
Don't know  
Refused

**SEE QUOTA**

**SEE QUOTA  
– calculate  
from sample  
based on  
postcode  
areas**

QK. RECORD POSTCODE

NB PLEASE RECORD POSTCODE AS ACCURATELY AS POSSIBLE AS THIS WILL BE USED IN ANALYSIS

QL. As far as you are aware, which of these options would be available to you in your area if you wanted them?  
MUTLTICODE. READ OUT. DO NOT SHOW/READ OUT THE OPTION CURRENTLY ON AT QF-G

Dial-up using a normal telephone line and a standard 56K modem.....  
Broadband access delivered to your office via a fixed line telephone (such as BT)  
Broadband access via cable companies such as NTL/Telewest using a cable modem  
SDSL broadband access (i.e. a more expensive type of broadband which has similar upload and download speeds)  
Broadband via satellite or fixed wireless broadband – as a reminder this delivers broadband to your home using radio links between an aerial located on the outside of your house and the internet providers base station, rather than using a telephone line or a cable television network  
None of the above

## **MAIN QUESTIONNAIRE**

**INTERVIEWER SAY:** *For the rest of this questionnaire please could you think specifically about your main method of connecting to the Internet, that is your*

**<< INSERT CONNECTION TYPE>>.**

**FOR BUSINESS = CONNECTION AT QG/QH.**

**FOR RESIDENTIAL = CONNECTION AT QF/QG/QH.**

Q1 Which supplier are you currently using for your main Internet connection?

DO NOT READ OUT. SINGLE CODE

AOL

Advance Internet

BT

Bulldog

Carphone Warehouse (Talk Talk)

Centrica

Claranet

Colt Telecommunications

Datanet International (DataDSL)

Demon Internet

Easynet

Freeserve

Kingston Communications

Mailbox Internet

Mistral

Netscalibur

NTL .....**CLOSE IF ALSO DO NOT KNOW WHETHER**

CABLE OR DSL CONNECTION AT RESIDENTIAL (code 3 at QG)

O2

Onyx Internet

Orange

Pipex Internet

Post Office

Plusnet

Sky

Telewest/Blueyonder .....**CLOSE IF ALSO DO NOT KNOW WHETHER**

CABLE OR DSL CONNECTION AT RESIDENTIAL (code 3 at QG)

Tesco

Tiscali

Virgin

Wanadoo

Zen Internet

Other (WRITE IN)

Don't know .....**CLOSE IF ALSO DO NOT KNOW WHETHER**

ADSL/SDSL CONNECTION AT BUSINESS (code 3 at QH), OR IF ALSO DO NOT KNOW WHETHER CABLE  
OR DSL CONNECTION AT RESIDENTIAL (code 3 at QG)

ASK Q2-3 OF ALL USING ADSL/CABLE/SATELLITE-FIXED WIRELESS BROADBAND. OTHERS SKIP TO Q4

Q.2a What is the download speed of your current connection? DO NOT READ OUT. SINGLE CODE

- Up to 512 kbit (1/2 Mb)
- Up to 1Mb
- Up to 2Mb
- Up to 4Mb
- Up to 8Mb
- Up to 10Mb
- Other (WRITE IN)
- Don't know

IF DON'T KNOW ASK Q2b

Q2b. Which of the following download speeds do you think your current connection might be?

READ OUT. SINGLE CODE

- Up to 512 kbit (1/2 Mb) ..... 1
- Up to 1Mb ..... 2
- Up to 2Mb ..... 3
- Up to 4Mb ..... 4
- Up to 8Mb ..... 5
- Up to 10 Mb ..... 6
- Other (WRITE IN) ..... 7
- Don't know ..... 8

Q3. Is your main broadband connection..... READ OUT? SINGLE CODE

- Uncapped, i.e. unlimited downloads
- Capped, i.e. you have limits set on the amount of downloads and have to pay more if you go over this
- Other (please specify)
- Don't know (Don't read out)

ASK Q4 OF ALL USING DIAL-UP/ISDN. OTHERS SKIP TO Q5

Q4. When using this connection <<does your company/do you>>...?

READ OUT. SINGLE CODE

- Pay per-minute call charges for ALL the time you are online
- Pay NO per-minute call charges as these are covered in the regular subscription fee, or
- Pay a combination of subscription fee AND some per-minute call charges
- Don't know (Don't read out)

ASK ALL

Q5a. Do you pay for your Internet connection monthly, quarterly or annually?

DO NOT READ OUT. SINGLE CODE

- Monthly ..... 1
- Quarterly ..... 2
- Annually ..... 3
- Don't know ..... 4 **ASK MONTHLY AT Q6a**

Q5b. Which, if any, of the following do you pay for as part of your package with your current internet provider? READ OUT. MULTICODE.

- Fixed / landline telephone line rental ..... 1
- Fixed/landline call charges ..... 2
- Mobile telephone ..... 3
- Internet Access ..... 4
- Multi-Channel TV ..... 5
- None of the above ..... 6

**NOTE TO INTERVIEWERS:**

**Q6 IS CRUCIAL TO THE QUESTIONNAIRE – IF THE RESPONDENT DOES NOT KNOW ASK THEM TO MAKE THEIR BEST ESTIMATE.**

Q6A How much <<does your company/do you>> pay each (INSERT FROM Q6) for your main internet access subscription, **including** VAT? Please do not include any other phone charges or bills (such as phone line rental or the cost of voice calls), only the total amount you pay for your internet service.  
WRITE IN NUMBER TO THE NEAREST £ AND USE LEADING ZEROS SO THAT ANSWER HAS FIVE DIGITS.  
E.G. IF ANSWER IS "£18.99" ENTER "00019".

FOR BUSINESS SCRIPT ONLY: IF BUSINESS CUSTOMERS ONLY KNOW EXCLUDING VAT – RECORD EXCLUDING VAT

Q6B. IF DON'T KNOW, READ OUT PRE-CODES AND SINGLE CODE ACCORDINGLY.  
IF STILL DO NOT KNOW, ASK TO GIVE BEST ESTIMATE.

Have free internet access (for example, as part of your phone or TV package)

Under £10

£10 or over but under £15

£15 or over but under £20

£20 or over but under £25

£25 or over but under £30

£30 or over but under £80

£80 or over but under £120

£120 or over but under £150

£150 or over but under £200

£200 or over but under £500

£500 or over but under £1000

£1000 or over

Not sure because your internet package is bundled with other services (for example, as part of your phone or TV package)

(DO NOT READ OUT) Don't know

ASK Q6C FOR BUSINESS ONLY (FOR CONSUMERS ASSUME = INCLUDING VAT) EXCEPT IF DON'T KNOW AT Q6B  
PROMPTED LIST IN WHICH CASE SKIP TO Q7

Q6C. Can I confirm whether the amount you have just given was including or excluding VAT? SINGLE CODE

1 INCLUDING VAT

2 EXCLUDING VAT



**SNNIP**

Q7 Earlier you told me that the following connections are available in your area <<INSERT CONNECTION TYPES AWARE OF AT QK (business)/QL (residential). You've also told me that you use <<INSERT CONNECTION TYPE>> to access the internet. I'd like you to imagine that the price of all <<INSERT CONNECTION TYPE>> services from all suppliers in the market including your own went up by 10% (in other words by £0.00 per month <<CONVERT INTO ACTUAL AMOUNT IN POUNDS AND PENCE *PER MONTH* BASED ON SPEND AT Q6 - DO THIS ACCORDING TO AMOUNT MENTIONED WHETHER OR NOT INCLUDING OR EXCLUDING VAT. IF DON'T KNOW (not bundled option) AT Q6 SAY "around £1.50-£2.50) >>. This means that you would not be able to avoid the price increase by switching to alternative suppliers of <<INSERT CONNECTION TYPE>> services.

Please assume the 10% increase would not apply to any services you may pay extra for such as making calls, security etc. Assuming this 10% increase occurred, which of the following would you be most likely to do?

READ OUT ALL OPTIONS BEFORE ALLOWING RESPONDENT TO CODE AN ANSWER. ROTATE ORDER.  
SINGLE CODE

IF NECESSARY: Please assume it is not possible to negotiate with the company to reduce this and that the price rise would last for at least a year.

IF DON'T KNOW, SAY: I know you are not totally sure but try to think about what you might do in this situation.

Continue to use current connection method at the increased price ie. <<INSERT RESPONDENTS CONNECTION TYPE>>  
Change to use a *different way* of accessing the Internet (BROADBAND ONLY SAY: including a different type of broadband connection) other than <<RESPONDENT'S CONNECTION TYPE>>  
Other (write in.....)  
Don't know (Don't read out)

SKIP Q8 IF DON'T KNOW AT Q7

Q8 And how likely do you think it is that you would do this? READ OUT. SINGLE CODE

Certain to  
Very likely  
Fairly likely  
Fairly unlikely  
Very unlikely  
Certain not to  
Don't know (Don't read out)

ASK Q9a-c IF MENTION THEY WOULD USE DIFFERENT WAY OF ACCESSING AT Q7. OTHERS SKIP TO Q10

Q9a What type of connection do you think you would be most likely to switch to for access to the Internet? DO NOT READ OUT. SINGLE CODE

Switch to a normal telephone line dial up connection  
Switch to an ISDN line (BUSINESS ONLY)  
Switch to broadband via ADSL  
Switch to broadband via Cable  
Switch to a leased line (BUSINESS ONLY)  
Switch to SDSL  
Switch to a satellite or fixed wireless broadband connection  
Switch to a different type of broadband connection (unspecified) - GO TO Q9c  
Other (WRITE IN)  
Don't know - GO TO Q9d

**CATI PROGRAM TO IDENTIFY IF CODE CURRENT CONNECTION TYPE  
IF SO, ASK Q9b. OTHERS SKIP TO Q9c**

Q9b. This is the same as your current connection type, so does this mean you would actually continue to use your current connection method at the increased price – or would you change to use a different way of accessing the internet, other than <<INSERT CONNECTION TYPE>> . SINGLE CODE

Continue to use current connection method at the increased price ie. <<INSERT RESPONDENTS CONNECTION TYPE>>-- GO TO Q10

Change to use a *different way* of accessing the Internet (BROADBAND ONLY SAY: including a different type of broadband connection) other than <<RESPONDENT'S CONNECTION TYPE>> - REPEAT Q9a

Other (write in.....) GO TO Q10

Don't know (Don't read out)

ASK Q9c IF CODE SWITCH TO A DIFFERENT TYPE OF BROADBAND CONNECTION (UNSPECIFIED) AT Q9a.

Q9c. Which of the following types of Broadband do you think you would switch to? READ OUT ALL OPTIONS BEFORE ALLOWING THE RESPONDENT TO CODE AN ANSWER. **ROTATE ORDER.** SINGLE CODE

**HIDE CURRENT CONNECTION TYPE**

Switch to broadband via ADSL

Switch to broadband via Cable

Switch to SDSL, which would provide a dedicated service, fast speed, similar upload and download speeds

Switch to a satellite or fixed wireless broadband connection

Don't know (READ OUT)

ASK Q9d IF DON'T KNOW AT Q9a

Q9d. Which one, if any, of the following would you be most likely to do? READ OUT ALL OPTIONS BEFORE ALLOWING THE RESPONDENT TO CODE AN ANSWER. **ROTATE ORDER.** SINGLE CODE.

**HIDE CURRENT CONNECTION TYPE**

Switch to a normal telephone line dial up connection

Switch to an ISDN line (HIDE FOR RESIDENTIAL CONSUMERS)

Switch to broadband via ADSL

Switch to broadband via Cable

Switch to a leased line, which would provide a dedicated service, fast speed, similar upload and download speeds (HIDE FOR RESIDENTIAL CONSUMERS)

Switch to SDSL, which would also provide a dedicated service, fast speed, similar upload and download speeds

Switch to a satellite or fixed wireless broadband connection

Other (WRITE IN)

Don't know (READ OUT)

**ASK Q10-12 SERIES IF ADSL/CABLE BROADBAND USERS WHO SAY “Changing to use a *different way* of accessing the Internet” OR “other” AT Q7 OTHERS SKIP TO Q13**

Q10 I'd now like to know which of the following courses of action you would consider if the price of all the Internet connection packages using **both <<INSERT CURRENT CONNECTION TYPE I.E. ADSL OR CABLE>> and <<INSERT TYPE OF CONNECTION THEY PLAN TO CHANGE TO AT Q9A-D>>** were to rise by 10% per month (in other words by £0.00 per month <<CONVERT INTO ACTUAL AMOUNT IN POUNDS AND PENCE *PER MONTH* BASED ON SPEND AT Q6 - DO THIS ACCORDING TO AMOUNT MENTIONED WHETHER OR NOT INCLUDING OR EXCLUDING VAT. IF DON'T KNOW (not bundled option) AT Q6 SAY “around £1.50-£2.50) >>. This means that you would also not be able to avoid the price increase by switching to alternative suppliers of <<INSERT TYPE OF CONNECTION THEY PLAN TO CHANGE TO AT Q9A-D>> services.

Please assume the 10% increase would not apply to any services you may pay extra for such as making calls, security etc. Assuming this 10% increase occurred, which of the following would you be most likely to do?

READ OUT ALL OPTIONS BEFORE ALLOWING RESPONDENT TO CODE AN ANSWER. ROTATE ORDER.  
SINGLE CODE

IF NECESSARY: Please assume it is not possible to negotiate with the company to reduce this and that the price rise would last for at least a year.

IF DON'T KNOW, SAY: I know you are not totally sure but try to think about what you might do in this situation.

Continue to use current connection method at the increased price i.e. <<INSERT RESPONDENTS CONNECTION TYPE>>  
Continue to switch to <<INSERT TYPE OF CONNECTION METHOD PLAN TO SWITCH TO AT Q9A-D>> despite it also increasing in price  
Change to use a *different way* of accessing the Internet other than <<INSERT CURRENT CONNECTION TYPE – I.E. ADSL OR CABLE>> or <<INSERT TYPE OF CONNECTION METHOD PLAN TO SWITCH TO AT Q9A-D>>  
Other (write in.....)  
Don't know (Don't read out)

SKIP Q11 IF DON'T KNOW AT Q10

Q11 And how likely do you think it is that you would do this? READ OUT. SINGLE CODE

Certain to  
Very likely  
Fairly likely  
Fairly unlikely  
Very unlikely  
Certain not to  
Don't know (Don't read out)

ASK Q12a-c IF MENTION THEY WOULD USE DIFFERENT WAY OF ACCESSING AT Q10. OTHERS SKIP TO Q13

Q12a What type of connection do you think you would be most likely to switch to for access to the Internet? DO NOT READ OUT. SINGLE CODE

Switch to a normal telephone line dial up connection  
Switch to an ISDN line (BUSINESS ONLY)  
Switch to broadband via ADSL  
Switch to broadband via Cable  
Switch to a leased line (BUSINESS ONLY)  
Switch to SDSL  
Switch to a satellite or fixed wireless broadband connection  
Switch to a different type of broadband connection (unspecified) - GO TO Q9c  
Other (WRITE IN)  
Don't know – GO TO Q9d

**CATI PROGRAM TO IDENTIFY IF CODE CURRENT CONNECTION TYPE OR ONE PLANNED TO SWITCH TO AT Q9A-D. IF SAME ASK Q12b. OTHERS SKIP TO Q12c**

Q12b. Does this mean you would actually <<IF SAY CURRENT CONNECTION TYPE SAY: continue to use your current connection method>> << IF SAY CHANGE TO SAME METHOD ALREADY STATED AT Q9A-D SAY: change to INSERT CONNECTON METHOD USED AT 9A-D >> at the increased price – or would you change to use a different way of accessing the internet, other than these that has not increased in price. SINGLE CODE

Continue to use current connection method at the increased price i.e. <<INSERT RESPONDENTS CONNECTION TYPE>>– GO TO Q13  
Continue to switch to <<INSERT TYPE OF CONNECTON METHOD PLAN TO SWITCH TO AT Q9A-D>> despite it also increasing in price – GO TO Q13  
Change to use a *different way* of accessing the Internet other than <<INSERT CONNECTION TYPE>> or <<INSERT TYPE OF CONNECTON METHOD PLAN TO SWITCH TO AT Q9A-D>> - REPEAT Q12a  
Other (write in.....) GO TO Q13  
Don't know (Don't read out)

ASK Q12c IF CODE SWITCH TO A DIFFERENT TYPE OF BROADBAND CONNECTION (UNSPECIFIED) AT Q12a.

Q12c. Which of the following types of Broadband do you think you would switch to? READ OUT ALL OPTIONS BEFORE ALLOWING THE RESPONDENT TO CODE AN ANSWER. **ROTATE ORDER.** SINGLE CODE

Switch to broadband via ADSL (DO NOT SHOW IF CURRENT CONNECTION OR ALREADY CODED AT Q9A-C)  
Switch to broadband via Cable (DO NOT SHOW IF CURRENT CONNECTION OR ALREADY CODED AT Q9A-C)  
Switch to SDSL, which would provide a dedicated service, fast speed, similar upload and download speeds (DO NOT SHOW IF ALREADY CODED AT Q9A-C)  
Switch to a satellite or fixed wireless broadband connection (DO NOT SHOW IF ALREADY CODED AT Q9A-C)  
Don't know (READ OUT)

ASK Q12d IF DON'T KNOW AT Q12a

Q12d. Which one, if any, of the following would you be most likely to do? READ OUT ALL OPTIONS BEFORE ALLOWING THE RESPONDENT TO CODE AN ANSWER. **ROTATE ORDER.** SINGLE CODE.

Switch to broadband via ADSL (DO NOT SHOW IF CURRENT CONNECTION OR ALREADY CODED AT Q9A-C)  
Switch to broadband via Cable (DO NOT SHOW IF CURRENT CONNECTION OR ALREADY CODED AT Q9A-C)  
Switch to a normal telephone line dial up connection (DO NOT SHOW IF ALREADY CODED AT Q9A-C)  
Switch to an ISDN line(DO NOT SHOW IF ALREADY CODED AT Q9A-C) (HIDE FOR RESIDENTIAL CONSUMERS)  
Switch to a leased line, which would provide a dedicated service, fast speed, similar upload and download speeds (DO NOT SHOW IF ALREADY CODED AT Q9A-C) (HIDE FOR RESIDENTIAL CONSUMERS)  
Switch to SDSL, which would also provide a dedicated service, fast speed, similar upload and download speeds(DO NOT SHOW IF ALREADY CODED AT Q9A-C)  
Switch to a satellite or fixed wireless broadband connection (DO NOT SHOW IF ALREADY CODED AT Q9A-C)  
Other (WRITE IN)  
Don't know (READ OUT)

**Bundled SNNIP question – for those on free broadband (CODE 1 AT Q6A/B) or who don't know how much they pay because they are on bundled package (CODE “not sure” AT Q6A/B).**

Q13. Earlier you told me that the following connections are available in your area <<INSERT CONNECTION TYPES AWARE OF AT QK (business)/QL (residential). You've also told me that you use <<INSERT CONNECTION TYPE>> to access the internet. I'd like you to imagine that the price of all <<INSERT CONNECTION TYPE>> services from all suppliers of that service went up by 10% and your current provider also followed suit by introducing a price rise of £1.50-£2.50 on your current service package of <<INSERT CONNECTION TYPE>> and <<INSERT ALL CODES MENTIONED AT Q5b>>.

This means that the price of your current service package would now be higher because other providers of <<INSERT CONNECTION TYPE>> will have also raised their prices, therefore you wouldn't be any better off than before the price rise in changing to a different broadband provider.

READ OUT ALL OPTIONS BEFORE ALLOWING RESPONDENT TO GIVE AN ANSWER. ROTATE ORDER.  
SINGLE CODE

IF NECESSARY: Please assume it is not possible to negotiate with the company to reduce this and that the price rise would last for at least a year.

IF DON'T KNOW, SAY: I know you are not totally sure but try to think about what you might do in this situation.

I would remain on my current service type, continuing to use current connection method at the increased price (i.e. <<INSERT RESPONDENT'S CONNECTION TYPE>>)

Change to use a *different way* of accessing the Internet other than <<RESPONDENT'S CONNECTION TYPE>> (BROADBAND ONLY SAY: including a different type of broadband connection) but only if they also offered a bundled service package including <<INSERT BUNDLED PACKAGE A>>; and <<INSERT ALL CODES MENTIONED AT Q5b>>

Change to use a *different way* of accessing the Internet other than <<RESPONDENT'S CONNECTION TYPE>> (BROADBAND ONLY SAY: including a different type of broadband connection) even if this meant buying your <<INSERT BUNDLED PACKAGE A>>; and <<INSERT ALL CODES MENTIONED AT Q5b>> separately.

Other (write in.....)

Don't know (Don't read out)

SKIP Q14 IF DON'T KNOW AT Q13

Q14 And how likely do you think it is that you would do this? READ OUT. SINGLE CODE

Certain to  
Very likely  
Fairly likely  
Fairly unlikely  
Very unlikely  
Certain not to  
Don't know (Don't read out)

ASK Q15a-c IF MENTION THEY WOULD USE DIFFERENT WAY OF ACCESSING AT Q13. OTHERS SKIP TO Q16

Q15a What type of connection do you think you would be most likely to switch to for access to the Internet? DO NOT READ OUT. SINGLE CODE

Switch to a normal telephone line dial up connection  
Switch to an ISDN line (BUSINESS ONLY)  
Switch to broadband via ADSL  
Switch to broadband via Cable  
Switch to a leased line (BUSINESS ONLY)  
Switch to SDSL  
Switch to a satellite or fixed wireless broadband connection  
Switch to a different type of broadband connection (unspecified) - GO TO Q15c  
Other (WRITE IN)  
Don't know - GO TO Q15d

**CATI PROGRAM TO IDENTIFY IF CODE CURRENT CONNECTION TYPE  
IF SO, ASK Q15b. OTHERS SKIP TO Q15c**

Q15b. This is the same as your current connection type, so does this mean you would actually continue to use your current connection method at the increased price (i.e. accept the price rise that has occurred across all <<INSERT CONNECTION TYPE>> products) – or would you change to use a different way of accessing the internet, other than <<INSERT CONNECTION TYPE> . SINGLE CODE

Continue to use current connection method at the increased price (i.e. <<INSERT CONNECTION TYPE>>) – GO TO Q16

Change to use a *different way* of accessing the Internet other than <<INSERT CONNECTION TYPE>> (BROADBAND ONLY SAY: including a different type of broadband connection) but only if they also offered a bundled service including <<INSERT ALL CODES MENTIONED AT Q5b>>- REPEAT Q15a

Change to use a *different way* of accessing the Internet other than <<RESPONDENT'S CONNECTION TYPE>> (BROADBAND ONLY SAY: including a different type of broadband connection) even if this meant buying your <<INSERT ALL CODES MENTIONED AT Q5b>> separately. - REPEAT Q15a

Other (write in.....) - GO TO Q16

Don't know (Don't read out) – GO TO Q16

ASK Q15c IF CODE SWITCH TO A DIFFERENT TYPE OF BROADBAND CONNECTION (UNSPECIFIED) AT Q15a.

Q15c. Which of the following types of Broadband do you think you would switch to? READ OUT ALL OPTIONS BEFORE ALLOWING THE RESPONDENT TO CODE AN ANSWER. **ROTATE ORDER.** SINGLE CODE

**HIDE CURRENT CONNECTION TYPE**

Switch to broadband via ADSL

Switch to broadband via Cable

Switch to SDSL, which would provide a dedicated service, fast speed, similar upload and download speeds

Switch to a satellite or fixed wireless broadband connection

Don't know (READ OUT)

ASK Q15d IF DON'T KNOW AT Q15a

Q15d. Which one, if any, of the following would you be most likely to do? READ OUT ALL OPTIONS BEFORE ALLOWING THE RESPONDENT TO CODE AN ANSWER. **ROTATE ORDER.** SINGLE CODE.

**HIDE CURRENT CONNECTION TYPE**

Switch to a normal telephone line dial up connection

Switch to an ISDN line (BUSINESS ONLY)

Switch to broadband via ADSL

Switch to broadband via Cable

Switch to a leased line, which would provide a dedicated service, fast speed, similar upload and download speeds (BUSINESS ONLY)

Switch to SDSL, which would also provide a dedicated service, fast speed, similar upload and download speeds

Switch to a satellite or fixed wireless broadband connection

Other (WRITE IN)

Don't know (READ OUT)

## **BACKGROUND SWITCHING QUESTIONS**

Q16. How long have you had your current Internet connection, that is your <<INSERT CURRENT CONNECTION TYPE >>?

DO NOT READ OUT. SINGLE CODE

Less than 3 months  
3-6 months  
7-12 months  
More than 1 year - up to 2 years  
More than 2 years - up to 3 years  
More than 3 years - up to 4 years  
More than 4 years - up to 5 years  
5 years or more  
Don't know

Q17a. How likely are you to change the way in which you connect to the Internet in the next 12-18 months, for example to dial up, broadband, leased lines etc.?

READ OUT. SINGLE CODE

INTERVIEWER NOTE: CHANGING FEATURES OF YOUR CURRENT METHOD OF CONNECTION SUCH AS UPGRADING SPEED OR CHANGING PAYMENT METHODS WOULD NOT COUNT AS CHANGING THE WAY YOU CONNECT TO THE INTERNET.

Certain to  
Very likely  
Fairly likely  
Fairly unlikely  
Very unlikely  
Certain not to  
Don't know (Don't read out)

ASK Q17b IF LIKELY TO SWITCH (TOP THREE BOXES) AT Q17a. OTHERS SKIP TO Q18

Q17b. What type of Internet connection are you planning to use?

DO NOT READ OUT. SINGLE CODE

A normal telephone line dial up connection  
An ISDN line (HIDE FOR RESIDENTIAL CONSUMERS)  
Broadband via ADSL  
Broadband via Cable  
A leased line (HIDE FOR RESIDENTIAL CONSUMERS)  
SDSL  
A satellite or fixed wireless broadband connection  
A different type of broadband connection (unspecified)  
Other (WRITE IN)  
Don't know – GO TO Q19

ASK Q18a-b IF ISDN/DIAL-UP CONSUMER USERS AND CODE ADSL/CABLE/SATELLITE FIXED

WIRELESS/UNSPECIFIED BROADBAND AT Q17b. OTHERS SKIP TO Q19

Q18a. You mentioned that you were thinking about changing from your ISDN/dial up connection to broadband in the future.

If the price of **broadband Internet subscription charges** were to rise by 10% across all providers, would you be most likely to (READ OUT)?

Stay on your current ISDN/dial-up connection  
Continue to switch to broadband  
Other (write in.....)  
Don't know (Don't read out)

SKIP Q18b IF DON'T KNOW AT Q18a

Q18b And how likely do you think it is that you would do this? READ OUT. SINGLE CODE

Certain to  
Very likely  
Fairly likely  
Fairly unlikely  
Very unlikely  
Certain not to  
Don't know (Don't read out)

#### **PROFILE BUSINESS**

Q19. Approximately what was your annual turnover for the last financial year (2004/5), was it....? READ OUT. WRITE IN TO NEAREST MILLION USING LEADING ZEROS. IF NECESSARY, READ OUT LIST AND SINGLE CODE ACCORDINGLY

Under £50,000  
£50,000-£75,000  
Over £75 - £100,000  
Over £100-£250,000  
Over £250 - £500,000  
Over £500,000-£1 million  
Over £2-£5m  
Over £6m-£10m  
Over £11m-£20m  
Over £21m-£50m  
Over £51m-£100m  
More than £100m  
Don't know/refused

#### **PROFILE RESIDENTIAL**

Q20. RECORD GENDER (do not ask). SINGLE CODE

Male  
Female

Q21. Which of the following most closely describes your working status? READ OUT. SINGLE CODE

Working full time, 30 or more hours per week  
Working part time, 8 to 29 hours per week  
Working less than 8 hours per week  
Unemployed  
Student  
Retired  
Prefer not to say

Q22. Which of the following most closely describes your annual household income? READ OUT. SINGLE CODE

Under £5,000  
£5 – £9,999  
£10 - £14,999  
£15 - £19,999  
£20 - £24,999  
£25 - £29,999  
£30 - £39,999  
£40 - £49,999  
£50 - £74,999  
£75 - £99,999  
£100,000 or more  
Prefer not to say