

# Narrowband Review 2017 – SME Survey

**Job Number:** 7854Q

**Project:** Narrowband Review 2017

**Survey:** Business Consumers (SME)

## **Introduction:**

### *All respondents*

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

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

IF NECESSARY ADD:

Your views are incredibly important in helping Ofcom to understand the challenges that businesses face when making decisions about communications services and the sort of advice, information or support that might make this easier.

It should take around 20 minutes of your time, depending upon your answers.

This is genuine research, no selling is involved at any stage, we simply want your opinions for our survey. May I ask you a few questions,.....or call back later?

IF REQUIRED:

- All our surveys are conducted under the Code of Conduct of the UK Market Research Society, and if you would like to check on anything I can give you their phone number (UK free phone number - 0500 396 999/ International phone number - 00 44 207 490 4911 calls charged at the international rate), or a website - [www.mrs.org.uk](http://www.mrs.org.uk). The name of the executive in charge of this project is \_\_\_\_\_ (+44 (0)203 643 9050).

- Critical Research is an independent market research agency based in London and Watford in the UK.

- If you would like to verify that is a legitimate piece of research commissioned by Ofcom we can also email you a letter that Ofcom have written for this purpose.

Please click Next (>>) to continue.

## Screening and Classification Questions

### ALL RESPONDENTS

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

- S1** Which of the following best describes your personal involvement with purchasing decisions regarding your organisation's telecoms and other communications services? Are you...?  
READ OUT SINGLE CODE

Solely responsible	1	
Jointly responsible with somebody else	2	
Or is someone else primarily responsible	3	CLOSE

- S2** Can I just double check that can you comment in detail on your organisation's experiences using communications suppliers and services? SINGLE CODE

Yes	1	REFERRAL
No	2	

- S3** Could I please confirm your exact job title? DO NOT READ OUT, SINGLE CODE

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

## Narrowband Review 2017 – SME Survey

**S4** Which of these best describes the sector your business operates in? READ OUT, SINGLE CODE

Primary (Extraction, mining, agriculture, forestry etc.).	1
Manufacturing	2
Construction	3
Wholesale/Transport/Communications	4
Retail	5
Financial Services	6
Other services	7
Public admin and services	8
Other (Please specify)	9

**S5.** Including yourself, how many people does your organisation currently employ in the UK either full or part time? READ OUT IF NECESSARY SINGLE CODE

1	1
2-4	2
5-9	3
10-19	4
20-49	5
50-249	6
250+	CLOSE
Don't Know	CLOSE
Prefer not to say	CLOSE

# Narrowband Review 2017 – SME Survey

## Communications Services

**Q1** Has your organisation used any of the following communications services in the last month?

AS MUCH AS POSSIBLE, WE WANT RESPONDENTS TO ANSWER BASED ON THE TOTAL ORGANISATION, INCLUDING ANY HOME WORKERS. READ OUT, MULTI CODE.

Standard landlines <i>(IF NECESSARY: We are referring to analogue telephone lines – not ISDN lines)</i>	1
Smartphones – such as <i>Apple iPhone or Samsung Galaxy</i>	2
Simple mobile phones – with simple features and limited internet functions, <i>not smartphones</i>	3
Broadband – whether ADSL Fixed line, Fibre or Cable broadband	4
Mobile broadband through a USB Modem or ‘dongle’	5
ISDN 2/2e <i>(IF NECESSARY: This is a form of ISDN line offering you connection for up to 8 digital devices and allowing you to make two calls at the same time)</i>	6
ISDN 30 <i>(IF NECESSARY: This is a form of ISDN line offering you 8 to 30 independent connections and allowing you to multiple calls at the same time)</i>	7
Leased lines or private circuits, including Ethernet leased line services – used to connect between locations and carry voice, video and data	8
Voice over Internet Protocol or VoIP services such those from Skype, Vonage or FaceTime <i>(IF NECESSARY: VoIP includes services that carry voice traffic over the internet, such as Skype and Vonage, and voice over IP services that a provider of communications services may offer sometimes called IP Voice or SIP trunking services).</i>	9
Video conferencing	10
None of these	11

**CLOSE IF CODE 11**

## SAY TO ALL

For the rest of the interview, where relevant we would like you to focus on all the sites you have knowledge of.

**Q2** What have you used each of the following communications services for in the last month?  
READ OUT. MULTICODE

		Making voice calls	Receiving voice calls	Internet	Other video confing (IF Q1 = 10)
Q2A	Standard landlines (Q1 = 1)	1	2	N/A	N/A
Q2B	ISDN 2/2e (Q1 = 6)	1	2	3	4
Q2C	ISDN 30 (Q1 = 7)	1	2	3	4
Q2D	Leased lines or private circuits (Q1 = 8)	1	2	3	4
Q2E	Broadband (Q1 = 4)	1	2	3	4
Q2F	Mobile phones or smartphones (Q1 = 2 OR 3)	1	2	3	4

*CLOSE IF NOT CODE 1 FOR STANDARD LANDLINES, ISDN 2/2e AND ISDN 30 AT Q2A, Q2B OR Q2C*

**Q3** How many of each type of connection do you have? ENTER NUMBER

		Q3
Q3A	Standard landlines (Q1 = 1)	
Q3B	ISDN 2/2e (Q1 = 6)	
Q3C	ISDN 30 (Q1 = 7)	
Q3D	Leased lines or private circuits (Q1 = 8)	
Q3E	Broadband (Q1 = 4)	
Q3F	Mobile phones or smartphones (Q1 = 2 OR 3)	

*IF MORE THAN ONE SERVICE USED FOR OUTGOING VOICE CALLS AT Q2 (CODE 1 AT MORE THAN ONE OF Q2A-Q2E – OR FIX SINGLE RESPONSE GIVEN AT Q2A-Q2E*

**Q4** From which of your fixed lines were most voice calls made during the last month? READ OUT.  
SINGLE CODE

Standard landlines (Q1 = 1 and Q2A = 1)	1
ISDN 2/2e (Q1 = 6 and Q2B = 1)	2
ISDN 30 (Q1 = 7 and Q2C = 1)	3
Leased lines or private circuits (Q1 = 8 and Q2D = 1)	4
Broadband (Q1 = 4 and Q2E = 1)	5

## Narrowband Review 2017 – SME Survey

*ASK Q5 AND Q6 IF HAVE STANDARD LANDLINE AND MOBILE PHONES AT Q1 (CODE 1 AND CODES 2-3)*

**Q5** Over the last three years, which of these applies in terms of the percentage of calls your business makes over a standard analogue landline and over mobile? Would you say...  
READ OUT. SINGLE CODE

The percentage of calls over mobile has increased	1
The percentage of calls over standard landlines has increased	2
The percentage of each has remained quite similar	3
Don't know	4

**Q6** How do you see this share changing over the next three years. Would you expect...  
READ OUT. SINGLE CODE

The percentage of calls over mobile will increase	1
The percentage of calls over standard landlines will increase	2
The percentage of each will remain quite similar	3
Don't know	4

*ASK FOR EACH AT Q1/ Q2A-D*

**Q7A-J** What is the name of the company or companies that you pay for your [ITEM AT Q2]?  
DO NOT READ OUT. MULTICODE

*ASK IF MORE THAN 1 SUPPLIER AT Q7A-J – OR FIX IN RESPONSE GIVEN AT Q7A-J*

**Q8A-J** And which company is the main provider of your [ITEM AT Q2]. DO NOT READ OUT.  
SINGLE CODE

- a. Standard landline calls (Q1 = 1 and Q2A = 1)
- b. Standard landline rental (Q1 = 1 and Q2A = 1)
- c. ISDN 2/2e line calls (Q1 = 6 and Q2B = 1)
- d. ISDN 2/2e line rental (Q1 = 6 and Q2B = 1)
- e. ISDN 30 line calls (Q1 = 7 and Q2C = 1)
- f. ISDN 30 line rental (Q1 = 7 and Q2C = 1)
- g. Broadband (Q1 = 4)
- h. VoIP calls made over your fixed line broadband (Q1 = 9)
- i. Calls made over your leased line/ private circuit connection (S11 = 8 and Q2D = 1)
- j. Leased line/ private circuit line rental (S11 = 8 and Q2D = 1)

## CODES FOR Q7A-J/Q8A-J

2E2	Janet	Superline
1-VoIP	Jive	Swiftcall
Alcatel	KCom (Kingston Comms)	TalkTalk
Alliance Phones	Localphone	Tesco Telecom
Alternative Networks	Madasafish	thePhoneCoop
Broadview	MegaPath	Three (3)
BT	Mitel	Titan
Carphone Warehouse	Nextiva	T-mobile
Chess	O2 / BE	Tooway
Claranet	One Bill	Toucan
Claritytel	Orange	Unicom / Universal Utilities
Colt	Pipex	Utility Warehouse
Daisy	Plusnet	Verizon
Demon	Post Office	Viber
DST (Directsave.com)	Primus	Virgin Media (NTL/ Telewest)
Eclipse	Rebtel	Vodafone
Everything Everywhere/EE	Resourced internally	VoIP Studio
Excel	RingCentral	Vonage
FaceTime Apple	ShoreTel	VYKE
Facebook Chat	Sky / Skytalk	Welcome Telecom
Gamma	Skype	Whatsapp
Global Crossing	South West	XLN telecom
Globephone	Southern	Yourcalls.net
Google Voice	Spacetel	Don't know
Homecall	Spitfire	Other (WRITE IN)
Intechnology	Supanet	

## Narrowband Review 2017 – SME Survey

*ASK Q9 FOR MAIN OUTGOING CALL FIXED LINE TYPE CODED AT Q4 (SUPPLIER CODED AT EITHER Q8A OR Q8C OR Q8E OR Q8H OR Q8I)*

**Q9** Thinking about your [MAIN FIXED LINE METHOD FROM Q4], why do you use [INSERT BRAND] provider for voice calls? DO NOT READ OUT. MULTICODE

Good/better deal overall	1
Price of overall calls package	2
Price of calls to mobile phones	3
Price of international calls	4
Quality of line / calls	5
Paid for as part of a bundled package	6
Provided free as part of bundled package	7
Unlimited weekend calls to UK landlines	8
Unlimited evening and weekend calls to UK landlines	9
Unlimited anytime calls to UK landlines	10
Offer internet calling / VoIP	11
Quality of customer service/ account management	12
Offer a range of services to businesses	13
Well-known and trusted brand	14
No reason to change	15
Too much hassle to change	16
Historical reasons/ always used them	17
Friends and family use them	18
Other suppliers are more expensive.	19
Other suppliers have worse line / call quality	20
Other suppliers have worse customer service	21
Not aware of other suppliers	22
Wasn't around when original decision was made	23
Reliable service	24
Other (WRITE IN)	25
None of the above	26



**Q10A-D** Have you switched the company that provides your [ITEM AT Q2], either in the last 12 months or longer ago?

		Yes in the last 12 months	Longer ago	Never switched
Q10A	Standard landlines (Q1 = 1)	1	2	3
Q10B	ISDN 2/2e (Q1 = 6)	1	2	3
Q10C	ISDN 30 (Q1 = 7)	1	2	3
Q10D	Broadband (Q1 = 4,5, OR 6)	1	2	3

*ASK Q11 IF MAIN OUTGOING CALL FIXED LINE SUPPLIER CODED AT Q4 IS DIFFERENT TO BROADBAND SUPPLIER (I.E. SUPPLIER FOR MAIN SERVICE USED AT Q4 IS DIFFERENT TO BROADBAND SUPPLIER AT Q8G)*

**Q11** Thinking about your [MAIN FIXED LINE METHOD FROM Q4], why do you use a different supplier for your fixed line broadband, rather than use your fixed voice calls supplier for broadband as well? DO NOT READ OUT. MULTICODE

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

## Narrowband Review 2017 – SME Survey

*ASK Q12 IF MAIN OUTGOING CALL FIXED LINE SUPPLIER CODED AT Q4 IS THE SAME AS LINE RENTAL SUPPLIER (E.G. WHERE Q8a=Q8b OR Q8c=Q8d OR Q8e=Q8f OR Q8i=Q8j FOR SERVICE CODED AT Q4)*

**Q12** Thinking about your [MAIN FIXED LINE METHOD FROM Q4], why do you use the same supplier for your fixed voice calls and your line rental? DO NOT READ OUT. MULTICODE

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

## Narrowband Review 2017 – SME Survey

*ASK Q13 IF MAIN OUTGOING CALL FIXED LINE SUPPLIER CODED AT Q4 IS DIFFERENT TO LINE RENTAL SUPPLIER (E.G. WHERE Q8a<>Q8b OR Q8c<>Q8d OR Q8e<>Q8f OR Q8i<>Q8j FOR SERVICE CODED AT Q4)*

**Q13** Thinking about your [MAIN FIXED LINE METHOD FROM Q4], why do you use a different supplier for your fixed voice calls, rather than use your line rental supplier for fixed voice calls as well? DO NOT READ OUT. MULTICODE

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

### ALL RESPONDENTS

**Q14** Which of the following best describes how you think about your [MAIN FIXED LINE METHOD FROM Q4] costs? READ OUT. SINGLE CODE

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

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*ASK Q15 FOR MAIN OUTGOING CALL FIXED LINE TYPE CODED AT Q4, UNLESS IT IS VOIP*

Q15 To what extent do you agree or disagree with the following statement: Under certain circumstances I would be prepared to give up the ability to make and receive calls from my [MAIN FIXED LINE METHOD FROM Q4]? READ OUT. SINGLE CODE

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

*ASK ALL ANSWERING CODES 1 OR 2 AT Q15*

Q16 Why would you be prepared to give up the ability to make and receive calls from your [MAIN FIXED LINE METHOD FROM Q4]? DO NOT READ OUT. MULTICODE.

Only need it for internet	1
Price of making calls from [MAIN FIXED LINE METHOD FROM Q4] is too high	2
I don't place a high value on making calls from my [MAIN FIXED LINE METHOD FROM Q4]	3
Reliability of connection	4
Quality of line/calls	5
Quality of customer service	6
Inconvenient/easier to use mobiles	7
Inconvenient/easier to use VoIP	8
Other (please specify)	9

## Narrowband Review 2017 – SME Survey

### ASK ALL ANSWERING CODES 3, 4 OR 5 AT Q15

Q17 Why would you not be prepared to give up the ability to make and receive calls from your [MAIN FIXED LINE METHOD FROM Q4]? DO NOT READ OUT. MULTICODE.

Already use this line for internet.	1
Price of making calls from [MAIN FIXED LINE METHOD FROM Q4] is low/good value	2
I prefer to make calls from my [MAIN FIXED LINE METHOD FROM Q4]	3
Reliability of connection	4
Quality of line/calls.	5
Quality of customer service	6
Don't have/use mobile(s)	7
Less convenient/less easy to use mobiles	8
Don't have/use VoIP	9
Less convenient/less easy to use VoIP	10
No reason to change	11
Too much hassle to change	12
Historical reasons/always used for business calls	13
Already have equipment/hardware for these calls	14
Clients/customers/partners are familiar with it.	15
Other (please specify)	16

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### ASK IF CODE 1 AT Q2F

**Q18** You said earlier that your organisation makes calls using mobile phones. Why don't you make all your business calls from mobile phones or smartphones in place of using your fixed line service(s)?

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

MULTICODE

Price of equipment / kit	1
Price of calls/ certain calls too high	2
Reliability of connection	3
Quality of line / calls	4
Coverage / black spots	5
Quality of customer service.	6
Inconvenient/Difficult to install	7
Inconvenient/Difficult to manage billing.	8
Inconvenient/Difficult to use	9
Concerned about impact on health	10
Mobile calls not seen as professional by customers	11
Gives a poor impression to the person being called	12
Not applicable - already make all calls by mobile	13
Other (WRITE IN)	14
Not sure	15

## Narrowband Review 2017 – SME Survey

ASK IF CODE 9 AT Q1 OR (Q2D =1 OR 2 ) OR (Q2E=1 OR 2)

**Q19** You said earlier that your organisation uses [CODE 9 at Q1: VoIP or online calling (perhaps Skype/ Face Time/ Vonage) [and] [(Q2D =1 OR 2 ) leased lines] [(Q2E =1 OR 2 ) Broadband] to make calls.

Why don't you make all your calls by using [VoIP or online call services] [leased lines] [broadband] from your place of work instead of using your fixed line service(s)?

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

Price of equipment / kit	1
Price of calls (unspecified)	2
Price of calls to landlines	3
Price of calls to mobile phones	4
Price of international calls	5
Reliability of connection.	6
Quality of line / calls.	7
Coverage / black spots.	8
Quality of customer service.	9
Inconvenient/Difficult to install	10
Inconvenient/Difficult to manage billing	11
Inconvenient/Difficult to use	12
Concerned about impact on health	13
Online calls not seen as professional by customers	14
Gives a poor impression to the person being called	15
Not applicable - already make most/ all calls by VoIP	16
Other (WRITE IN)	17
Not sure	18

## Narrowband Review 2017 – SME Survey

**Q20** Why don't you use email, [IF 2 OR 3 AT Q1: text messaging] or instant messaging (via an App such as Facebook Messenger or Whatsapp) more often from your place of work instead of making calls via a fixed line? DO NOT READ OUT. MULTICODE

Reliability of connection	1
Not suitable for certain types of conversation	2
Takes too long to type/ a voice call is quicker	3
No good when you need an immediate response	4
Inconvenient/Difficult to use	5
Prefer to talk to the other person	6
Customers need a personal touch	7
Price of texts	8
Quality of line / calls	9
Coverage / black spots	10
Not appropriate method of contacting clients	11
Only use texts when undertaking large mailouts	12
Not seen as professional by customers	13
Gives a poor impression to the person being contacted	14
Other (WRITE IN)	15
Not sure	16

### ASK FOR MAIN FIXED SERVICE AT Q4

**Q21** How much does your business spend per month on [MAIN FIXED LINE SERVICE AT Q4] in total?

IF NECESSARY – How much is a typical monthly bill for your [MAIN FIXED LINE SERVICE AT Q4] calls, line rental and any other services?

ENTER AMOUNT TO NEAREST WHOLE POUND \_\_\_\_\_1  
Don't know.....2

### ASK IF KNOW MONTHLY SPEND AT Q21

**Q22** How much of the total bill for [SPEND AT Q21] per month is for line rental?

IF NECESSARY – Within the typical monthly bill for your [MAIN FIXED LINE SERVICE AT Q4], how much of the charge is for line rental rather than for calls or any other services?

ENTER AMOUNT TO NEAREST WHOLE POUND \_\_\_\_\_1  
Don't know.....2



## Narrowband Review 2017 – SME Survey

*ASK FOR MAIN FIXED SERVICE AT Q4*

*IF ANSWER BOTH Q21 (TOTAL SPEND) AND Q22 (SPEND ON LINE RENTAL) - £X WILL BE 10% OF Q21 VALUE MINUS Q22 VALUE*

*IF DO NOT ANSWER Q21 OR Q22 - £X WILL BE £60 – TO BE REVIEWED ONCE 10% OF INTERVIEWS HAVE BEEN CONDUCTED AND REPLACED WITH AVERAGE FOR THOSE ANSWERING Q21 AND Q22*

Q23 SAY IF DO NOT ANSWER BOTH Q21 AND Q22 - For this example, please assume that the monthly spend on calls from your [MAIN FIXED LINE SERVICE AT Q4] is £60.

SAY TO ALL

If the price of your [MAIN FIXED LINE SERVICE AT Q4] calls increased by 10%, so an extra [£X] each month, how likely would you be to change the way you make calls from your place of work?

When answering, please assume that the price of calls offered by ALL [MAIN FIXED LINE SERVICE AT Q4] providers would increase by 10%, so there would be no financial benefit in simply switching to another provider. Please also assume that mobile, VoIP services or other forms of communication costs would remain the same.

IF NECESSARY - This would cover any extra payment for calls outside the basic package, including payments to extend free calls to daytime, payments for international calls and so on – but excluding the cost of line rental.

Please note that your answers here will not affect the real life future prices charged for your [MAIN FIXED LINE SERVICE AT Q4].

Would you say...

READ OUT SINGLE CODE

We would switch all calls away from [MAIN FIXED LINE SERVICE AT Q4] to another method	1
We would switch some but not all calls away from [MAIN FIXED LINE SERVICE AT Q4] to another method	2
This would not have any impact on the calls we make using a [MAIN FIXED LINE SERVICE AT Q4]	3
Don't know	4

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### ASK IF WOULD SWITCH ANY CALLS AT Q23 (CODES 1-2)

Q24 Which of these would you consider using instead to make calls if the price of [MAIN FIXED LINE SERVICE AT Q4] calls increased by 10%, so an extra [£X] each month?

Would you... READ OUT MULTI CODE

IF 'DON'T KNOW', CHECK – Would you prefer to change your answer to the previous question? GO BACK TO Q23 AND ASK AGAIN IF YES

- Switch to mobile voice calls ..... 1
- Switch to online calls/ Skype/ FaceTime/ VoIP calls online ..... 2
- Switch to email..... 3
- Switch to mobile phone texts or instant messaging ..... 4
- Something else – SPECIFY ..... 5
- Don't know ..... 6

### ASK IF WOULD SWITCH ANY CALLS AT Q23 (CODES 1-2)

Q25 Would you rely on [that other method/ those other methods] and give up your [MAIN FIXED LINE SERVICE AT Q4] if the price of calls increased by 10%

SINGLE CODE

- Yes, would give up [MAIN FIXED LINE SERVICE AT Q4] and just use other methods ..... 1
- No, would keep landline ..... 2
- Don't know ..... 3

## Narrowband Review 2017 – SME Survey

*ASK FOR MAIN FIXED SERVICE AT Q4*

*IF ANSWER Q21 (TOTAL SPEND - £X WILL BE 10% OF Q21 VALUE*

*IF DO NOT ANSWER Q21 BUT DO ANSWER THE NUMBER OF LINES AT Q3A - £X WILL BE NUMBER OF LINES AT Q3A MULTIPLIED BY £22.50 (SO FOR 10 LINES £X WOULD BE £225)*

*IF DO NOT ANSWER Q21 OR Q3A - £X WILL BE £230 – TO BE REVIEWED ONCE 10% OF INTERVIEWS HAVE BEEN CONDUCTED AND REPLACED WITH AVERAGE FOR THOSE ANSWERING Q21*

**Q26** SAY IF DO NOT ANSWER Q21 - For this example, please assume that the monthly spend on your total bills for your [MAIN FIXED LINE SERVICE AT Q4] is £230.

**SAY TO ALL**

If the price of your total [MAIN FIXED LINE SERVICE AT Q4] bill – not just the cost of calls - increased by 10%, so an extra [£Y] each month, how likely would you be to change the way you make calls from home?

When answering, please assume that the price of bills from by ALL [MAIN FIXED LINE SERVICE AT Q4] providers would increase by 10%, so there would be no financial benefit in simply switching to another provider. Please also assume that mobile, VoIP services like Skype or FaceTime or other forms of communication costs would remain the same.

Please note that your answers here will not affect the real life future prices charged for your [MAIN FIXED LINE SERVICE AT Q4].

Would you say...      READ OUT      SINGLE CODE

We would switch all calls away from [MAIN FIXED LINE SERVICE AT Q4] to another method	1
We would switch some but not all calls away from [MAIN FIXED LINE SERVICE AT Q4] to another method	2
This would not have any impact on the calls we make using a [MAIN FIXED LINE SERVICE AT Q4]	3
Don't know	4

## ASK IF WOULD SWITCH ANY CALLS AT Q26 (CODES 1-2)

**Q27** Which of these would you use instead to make calls if the price of total [MAIN FIXED LINE SERVICE AT Q4] bills and not just calls increased by 10%, so an extra [£Y] each month?

MULTI CODE

- Switch to mobile voice calls ..... 1
- Switch to online calls/ VoIP/ Skype/ FaceTime calls online ..... 2
- Switch to email..... 3
- Switch to mobile phone texts or instant messaging ..... 4
- Something else – SPECIFY ..... 5
- Don't know ..... 6

## ASK IF WOULD SWITCH ANY CALLS AT Q26 (CODES 1-2)

**Q28** Would you rely on [that other method/ those other methods] and give up your [MAIN FIXED LINE SERVICE AT Q4] if the price of total bills increased by 10%

SINGLE CODE

- Yes, would give up landline and just use other methods ..... 1
- No, would keep landline..... 2
- Don't know ..... 3

## And finally...

**Q29** Is your organisation VAT registered?

Yes	1
No	2

**Q30** Is your organisation PAYE registered? IF NECESSARY – So the organisation pays National Insurance and deducts PAYE through the payroll?

Yes	1
No	2

## IF CODE 1 AT Q30

**Q31** How many of your [number at S5] staff are on PAYE?

PAYE	
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### ASK ALL

**Q32** How many of your [number at S5] staff are self-employed – including any owners or partners of the organisation?

Self-employed/ Other	
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**STANDARD THANK AND CLOSE**