

# Narrowband Market Review Residential Consumers Survey – Draft 3

## INTRODUCTION

Good morning/afternoon/evening. My name is ... I am here on behalf of Quadrangle Operations, the market research company. We are conducting a special survey on behalf of Ofcom, the regulator for the UK communications industry. Ofcom is very interested in hearing your views on a variety of things including homes phones, mobile phones and the internet. The interview will take about 25 minutes.

**IF INTERVIEWING IN WALES, ONCE RESPONDENT AGREES TO TAKE PART SAY:** The interview will be conducted in English. If you would prefer to conduct the interview in Welsh I can arrange for a colleague to re-contact you to come back at an agreed time. What would you prefer?

**CONTINUE IF RESPONDENT IS HAPPY WITH BEING INTERVIEWED IN ENGLISH. IF RESPONDENT WOULD PREFER TO BE INTERVIEWED IN WELSH – NOTE THEIR NAME, TELEPHONE NUMBER AND FULL ADDRESS AND PASS THIS INFORMATION BACK TO YOUR AREA SUPERVISOR.**

## INFORMATION FROM SAMPLE

QC1	NATION	North East.....	1
		North West.....	2
		Yorks & Humber .....	3
		East Midlands .....	4
		West Midlands .....	5
		East of England .....	6
		London.....	7
		South East .....	8
		South West .....	9
		Scotland.....	10
		Wales.....	11
		Northern Ireland.....	12
QC2	AREA	Most Urban .....	1
		.....	2
		.....	3
		.....	4
		.....	5
		.....	6
		Most Rural .....	7

**COMPLETE FOR ALL RESPONDENTS**

**S1 ASK ALL**

Which of the following best describes your personal involvement in deciding which landline or broadband supplier to use at home?

- Solely responsible..... 1
- Jointly responsible with someone else..... 2
- Someone else is responsible ..... 3
- Don't have landline or broadband ..... 4

**CLOSE IF NO LANDLINE OR BROADBAND AT S1 (CODE 4)**

**IF CODE 3 AT S1 - REFER TO SOMEONE ELSE IN THE HOUSEHOLD TO INTERVIEW – NEED TO CODE 1 OR 2 AT S1 TO CONTINUE**

**S2 CODE GENDER (DO NOT ASK)**

- Male..... 1
- Female..... 2

**S3 ASK ALL**

What is your age?

- 16 - 17 ..... 1
- 18 - 24 ..... 2
- 25 - 34 ..... 3
- 35 - 44 ..... 4
- 45 - 54 ..... 5
- 55 - 64 ..... 6
- 65 - 74 ..... 7
- 75 - 84 ..... 8
- 85+ ..... 9

**S4 ASK ALL**

What is the occupation of the main wage earner in your household?

- A ..... 1
- B ..... 2
- C1 ..... 3
- C2 ..... 4
- D ..... 5
- E ..... 6
- Refused ..... 7

## SCREENER

### S5 ASK ALL

**SHOWCARD S5** Which of the following do you have at home – either you personally or anyone else in the household?

Smartphone – such as Apple iPhone or Samsung Galaxy .....	1
Simple mobile phone – with simple features and limited internet functions, not smartphones.....	2
Landline phone (i.e. home phone) .....	3
Fixed broadband internet .....	4
Mobile broadband (through a USB modem or 'dongle') .....	5
Pay TV (e.g. Virgin Media, Sky, BT TV) .....	6
A service like Skype, Vonage, FaceTime or WhatsApp to make voice or video calls over the internet – also known as Voice over IP or VoIP .....	7
NONE OF THESE .....	8

CLOSE IF NO SERVICE AT S5 (CODE 8)

### S6 ASK ALL WITH MOBILE BUT NO LANDLINE AT S5 (CODE 1-2 NOT CODE 3)

Can I check, you have a mobile but no landline home phone at this address?

Yes, only mobile.....	1
No – have landline phone as well – CORRECT S5 .....	2

### S7 ASK ALL WITH FIXED BROADBAND BUT NO LANDLINE AT S5 (CODE 4 NOT CODE 3)

Can I check, does your household pay line rental to receive the fixed broadband service?

Pay line rental .....	1
Don't pay line rental for fixed broadband .....	2
Don't know .....	3

CONTINUE IF HAVE LANDLINE PHONE AT S5 (CODE 3)

CONTINUE IF DO NOT HAVE LANDLINE PHONE AT S5 (NOT CODE 3) AND PAY LINE RENTAL FOR FIXED BROADBAND SERVICE AT S7 (CODE 1)

CLOSE IF DO NOT HAVE LANDLINE PHONE AT S5 (NOT CODE 3) AND DO NOT HAVE FIXED BROADBAND SERVICE AT S5 (NOT CODE 3)

CLOSE IF DO NOT HAVE LANDLINE PHONE AT S5 (NOT CODE 3) AND DO NOT PAY LINE RENTAL/ UNSURE WHETHER PAY LINE RENTAL FOR FIXED BROADBAND SERVICE AT S7 (CODE 2 OR 3)

Q1 ASK ALL WITH A LANDLINE PHONE AT S5 (CODE 3)

SHOWCARD Q1 Which company do you pay line rental to for your household's landline (home phone)?

SINGLE CODE

Q2 ASK ALL WITH A FIXED BROADBAND AT S5 (CODE 4)

SHOWCARD Q1 Which company do you pay for your household's fixed broadband service?

SINGLE CODE

	Q1	Q2
BT .....	1	1
Co-op/Cooperative.....	2	2
Demon .....	3	3
EE (inc. Orange/ T-Mobile) .....	4	4
Fuel Broadband .....	5	5
Homecall.....	6	6
John Lewis.....	7	7
KComm.....	8	8
O2.....	9	8
Plusnet.....	10	10
Post Office .....	11	11
Primus .....	12	12
Sky.....	13	13
SSE .....	14	14
TalkTalk.....	15	15
Tesco.....	16	16
Three .....	17	17
Utility Warehouse.....	18	18
Virgin Media.....	19	19
Vodafone .....	20	20
Other – SPECIFY .....	21	21
Don't know.....	22	22

Q3 ASK ALL WITH A LANDLINE AT S5 (CODE 3) AND WITH FIXED BROADBAND AT S5 (CODE 4) NAMING DIFFERENT SUPPLIERS AT Q1 AND Q2 (BOTH CODES 1-20 BUT NOT MATCHING CODES)

Can I check, you use [SUPPLIER AT Q1] for your landline and [SUPPLIER AT Q2] for your fixed broadband service?

- Yes, correct..... 1
- No – amend landline supplier..... 2
- No – amend broadband supplier..... 3

Q4 ASK ALL WITH A LANDLINE PHONE AT S5 (CODE 3)

SHOWCARD Q4 Do you receive any of these as part of your landline service from [SUPPLIER AT Q1]?

MULTI CODE FOR CODES 1-6

- Unlimited weekend calls to UK landlines ..... 1
- Unlimited evening and weekend calls to UK landlines ..... 2
- Unlimited calls to UK landlines at any time ..... 3
- Cheaper calls to mobile phones..... 4
- Cheaper international calls..... 5
- Something else - SPECIFY ..... 6
- Nothing else ..... 7
- Don't know ..... 8

Q5 ASK ALL WITH A LANDLINE PHONE AT S5 (CODE 3)

CODES 1-5 ONLY ASKED IF THEY SAID YES AT Q4

SHOWCARD Q5 Which of the following do you use or value as part of your service?

MULTI CODE FOR CODES 1-10

- Unlimited weekend calls to UK landlines ..... 1
- Unlimited evening and weekend calls to UK landlines ..... 2
- Unlimited calls to UK landlines at any time ..... 3
- Cheaper calls to mobile phones..... 4
- Cheaper international calls..... 5
- Caller display ..... 6
- Call waiting..... 7
- Call diversion ..... 8
- Built in answering service..... 9
- Other (WRITE IN) ..... 10
- None of these..... 11
- Don't know ..... 12

Q6 ASK ALL WITH A LANDLINE PHONE AT S5 (CODE 3)

SHOWCARD Q6 How do you pay the line rental for your landline phone service with [SUPPLIER AT Q1]? Please answer about your line rental rather than any other costs.

- On a monthly or quarterly basis, alongside call charges and any other costs ..... 1
- Pay line rental 12 months in advance to receive a discount then pay monthly or ..... 2
- quarterly for call charges and any other costs ..... 2
- Don't know..... 3

Q7     **ASK ALL WITH A LANDLINE PHONE AT S5 (CODE 3)**

Have you heard of the package from BT called BT Basic? It's a low cost service available to those in recipient of certain government benefits which has an allowance to spend on calls each month and a cap for those who spend above the allowance.

- Yes, heard of BT Basic ..... 1
- No, not heard of BT Basic..... 2

Q8     **ASK ALL WITH A LANDLINE PHONE AT S5 (CODE 3)**

**SHOWCARD Q8** When did the price of your landline last change without you making any changes to the service you take from use [SUPPLIER AT Q1]?

- In the last few months ..... 1
- In the last six months ..... 2
- In the last 12 months..... 3
- In the last 2 years..... 4
- Longer ago than 2 years ..... 5
- Don't know when the price last changed..... 6
- The price for our landline has not changed..... 7
- Don't know whether the price has changed ..... 8

Q9     **ASK ALL WITH A LANDLINE PHONE AT S5 (CODE 3)**

Why do you have a landline?  
PROBE – What other reasons?  
MULTI CODE

Q10    **ASK IF MORE THAN ONE REASON AT Q9**

What is your main reason for having a landline?  
SINGLE CODE

- |  | Q9 | Q10 |
|--|----|-----|
| To make calls.....                                       | 1  | 1   |
| To receive calls .....                                   | 2  | 2   |
| Need a landline to get broadband .....                   | 3  | 3   |
| Need a landline to get access to Pay TV .....            | 4  | 4   |
| In case of emergencies.....                              | 5  | 5   |
| More reliable than mobile.....                           | 6  | 6   |
| Cheaper than making calls with a mobile.....             | 7  | 7   |
| Cheaper for others to call me than calls to a mobile ... | 8  | 8   |
| Other – SPECIFY .....                                    | 9  | 9   |
| Don't know .....   | 10 | 10  |

**Q11 ASK ALL WITH A LANDLINE PHONE AT S5 (CODE 3)**

What were the main reasons for choosing [Q1] as your current landline provider?

PROBE – What other reasons?

MULTI CODE

Good/ better deal overall.....	1
Price of overall calls package.....	2
Price of calls to mobile phones .....	3
Price of international calls .....	4
Paid for as part of a bundled package .....	5
Provided free as part of a bundled package.....	6
Unlimited weekend/ evening calls to UK landlines .....	7
Unlimited calls anytime to UK landlines .....	8
Quality of customer service.....	9
Quality of line/ calls .....	10
Reliable service.....	11
Well-known and trusted brand .....	12
Always used them/ historical reasons .....	13
Friends and family use them .....	14
Other suppliers are more expensive .....	15
Other suppliers have worse customer service .....	16
There was no choice/ lack of providers in the area .....	17
To get a better broadband service .....	18
To get a better TV service.....	19
Other reasons – SPECIFY .....	20

**Q12 ASK ALL WITH A LANDLINE AT S5 (CODE 3)**

**SHOWCARD Q12** Approximately how often do you or anyone else in your household make calls on your home landline (home phone)?

SINGLE CODE

Every day.....	1
Every couple of days.....	2
Several times a week.....	3
Weekly .....	4
Every fortnight/ couple of weeks .....	5
Monthly .....	6
Less often .....	7
Never make calls from the landline .....	8
Don't know .....	9

Q13 ASK ALL WITH A LANDLINE AT S5 (CODE 3)

SHOWCARD Q13 Approximately how often does your household receive calls on your home landline (home phone)?

SINGLE CODE	Every day.....	1
	Every couple of days.....	2
	Several times a week.....	3
	Weekly.....	4
	Every fortnight/ couple of weeks.....	5
	Monthly.....	6
	Less often.....	7
	Never receive calls from the landline.....	8
	Don't know.....	9

Q14 ASK IF LANDLINE AND BROADBAND PROVIDERS ARE DIFFERENT (Q1 IS CODE 1-20 AND Q02B IS CODE 1-20 AND CODES DO NOT MATCH AT Q1 AND Q2)

Why do you use [Q2] for your broadband service rather than using [Q1] for your broadband and your landline?

PROBE – What other reasons?

MULTI CODE	Can't get broadband from calls supplier.....	1
	Can't get high speed broadband from calls supplier.....	2
	Faster broadband from broadband supplier.....	3
	Didn't know I could switch my broadband to the same supplier.....	4
	Well-known and trusted brand for broadband.....	5
	Always used them for broadband/ historical reasons.....	6
	Good/ better deal overall.....	7
	Price of line rental.....	8
	Price of landline calls.....	9
	Quality of customer service from broadband supplier.....	10
	Want to keep landline with current provider.....	11
	Other reasons – SPECIFY.....	12

Q15 ASK ALL WITH A LANDLINE PHONE AT S5 (CODE 3)

SHOWCARD Q15 Which of the following statements best describes how you think about your landline phone costs?

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
	Don't know.....	3



Q16 **ASK IF LANDLINE AND BROADBAND PROVIDERS ARE THE SAME (Q1 IS CODE 1-20 AND Q2 IS CODE 1-20 AND CODES MATCH AT Q1 AND Q2)**

Do you receive one bill from your landline provider [Q1] that covers both landline and broadband charges, or do you get separate bills from [Q1] for landline and broadband?

SINGLE CODE

- Both landline and broadband on one bill ..... 1
- Separate bills for landline and broadband..... 2
- Don't know ..... 3

Q17 **ASK ALL WITH A LANDLINE PHONE AT S5 (CODE 3)**

Have you or your household ever changed the company that provides your landline phone service?

IF NECESSARY – This would include changing from one supplier for your whole service to using two suppliers – one for line rental and the other for usage

IF YES – When did you most recently change supplier for your landline phone service?

SINGLE CODE

Q18 **ASK ALL WITH FIXED BROADBAND AT S5 (CODE 4)**

Have you or your household ever changed the company that provides your fixed broadband service?

IF NECESSARY – This would include changing from one supplier for your whole service to using two suppliers – one for line rental and the other for usage

IF YES – When did you most recently change supplier for your fixed broadband service?

SINGLE CODE

	Q17	Q18
In the last 12 months .....	1 .....	1
Longer ago .....	2 .....	2
No – never changed supplier.....	3 .....	3
Don't know.....	4 .....	4

Q19    **ASK IF SWITCHED LANDLINE CALL PROVIDER IN LAST 12 MONTHS AT Q17 (CODE 1)**

Which landline call service provider did you switch from (in the last 12 months)? [DON'T ALLOW SUPPLIER AT Q1 TO BE CODED]

Q20    **ASK IF SWITCHED FIXED BROADBAND PROVIDER IN LAST 12 MONTHS AT Q18 (CODE 1)**

Which fixed broadband service provider did you switch from (in the last 12 months)? [DON'T ALLOW SUPPLIER AT Q2 TO BE CODED]

	Q19	Q20
BT .....	1 .....	1
Co-op/Cooperative.....	2 .....	2
Demon .....	3 .....	3
EE (inc. Orange/ T-Mobile) .....	4 .....	4
Fuel Broadband .....	5 .....	5
Homecall.....	6 .....	6
John Lewis.....	7 .....	7
KComm.....	8 .....	8
O2.....	9 .....	8
Plusnet.....	10 .....	10
Post Office .....	11 .....	11
Primus .....	12 .....	12
Sky.....	13 .....	13
SSE .....	14 .....	14
TalkTalk.....	15 .....	15
Tesco.....	16 .....	16
Three .....	17 .....	17
Utility Warehouse.....	18 .....	18
Virgin Media.....	19 .....	19
Vodafone .....	20 .....	20
Other – SPECIFY .....	21 .....	21
Don't know.....	22 .....	22

**Q21 ASK IF SWITCHED LANDLINE CALL PROVIDER IN LAST 12 MONTHS AT Q17 (CODE 1)**

Why did you switch your landline call provider (in the last 12 months)?

**Q22 ASK IF SWITCHED FIXED BROADBAND PROVIDER IN LAST 12 MONTHS AT Q18 (CODE 1)**

Why did you switch your fixed broadband provider (in the last 12 months)?

MULTICODE

	Q21	Q22
For a better/ cheaper deal .....	1 .....	1
Poor service from previous supplier .....	2 .....	2
Good experience with new/ current supplier for other services .....	3 .....	3
To bundle two or more services together with one supplier .....	4 .....	4
Better range of price plans .....	5 .....	5
New/ current supplier recommended to me .....	6 .....	6
More reliable service .....	7 .....	7
Wanted a specific deal/ offer (e.g. all inclusive minutes) .....	8 .....	8
Faster broadband speeds .....	9 .....	9
Wanted bigger download allowance .....	10 .....	10
Other – SPECIFY .....	11 .....	11
Don't know .....	12 .....	12

**Q23 ASK IF SWITCHED LANDLINE CALL PROVIDER IN LAST 12 MONTHS AT Q17 (CODE 1)**

How did you get information about alternative providers or tariffs when you were looking to switch your landline call provider (in the last 12 months)?

MULTICODE

Looked at supplier websites .....	1
Looked at price comparison websites .....	2
Visited technology shops/ stores .....	3
Looked online at magazine/ newspaper articles .....	4
Looked at print copies of magazine/ newspaper articles .....	5
Looked at Which? recommendations .....	6
Asked friends/ colleagues/ neighbours for advice/ recommendations ..	7
Used search engine/ Google to search .....	8
Called suppliers .....	9
Other – SPECIFY .....	10
Don't know .....	11

**Q24 ASK ALL WITH A LANDLINE PHONE AT S5 (CODE 3) WHO HAVE NOT SWITCHED IN THE LAST 12 MONTHS AT Q17 (NOT CODE 1)**

In the last 12 months, have you tried to get any information about alternative landline providers or tariffs that you could use?

IF NO – CODE 12

IF YES – How did you try to get this information?

MULTICODE

Looked at supplier websites .....	1
Looked at price comparison websites .....	2
Visited technology shops/ stores .....	3
Looked online at magazine/ newspaper articles .....	4
Looked at print copies of magazine/ newspaper articles .....	5
Looked at Which? recommendations .....	6
Asked friends/ colleagues/ neighbours for advice/ recommendations..	7
Used search engine/ Google to search .....	8
Called suppliers.....	9
Other – SPECIFY .....	10
Don't know.....	11
No, have not tried to get any information (SINGLE CODE) .....	12

**Q24b ASK ALL LOOKING FOR INFORMATION (CODES 1-10) AT Q24**

Did you find the information you needed?

Yes .....	1
No.....	2
Don't know.....	3

**Q25 ASK IF HAVE NOT SWITCHED IN THE LAST 12 MONTHS (Q17 NOT CODE 1)**

Why have you not <switched IF Q24 CODES 1-11> <looked into any alternative landline providers or tariffs you could use – IF Q24 CODED 12> in the last 12 months?

MULTICODE

Happy/ content/ not looking to change from current supplier .....	1
Current provider is the best deal/ cheapest/ best value.....	2
Savings are not large enough.....	3
Prefer to stay with trusted/ known provider .....	4
Not much difference between the providers .....	5
Can't change – tied into a contract.....	6
Wouldn't know where to look/ what to look for.....	7
Concerned I could lose my landline number .....	8
Wouldn't want an engineer visit.....	9
Too time consuming to look into other options .....	10
Don't have a choice of landline providers in this area .....	11
Don't spend enough for a change to be worthwhile.....	12
Couldn't be bothered .....	13
Other – SPECIFY .....	14

SAY TO ALL WITH A LANDLINE AT S5 (CODE 3)

I'd like you to think about the calls that you have made from home in the last 12 months, so since April last year.

Q26 ASK IF HAVE LANDLINE AT S5 (CODE 3)

SHOWCARD Q26 How often did you use your landline at home to call other people?

Q27 ASK IF HAVE MOBILE AT S5 (CODE 1-2)

SHOWCARD Q27 How often did you use your mobile phone at home to call other people when you could easily have used your landline instead?

Q28 ASK IF USE VOIP AT S5 (CODE 7)

SHOWCARD Q28 How often did you use an online calls service like Skype or FaceTime at home to call other people when you could easily have used your landline instead?

SINGLE CODE

	Q26	Q27	Q28
Daily/ every day.....	1.....	1.....	1.....
A few times a week .....	2.....	2.....	2.....
Once a week .....	3.....	3.....	3.....
1-3 times a month.....	4.....	4.....	4.....
Less often than this .....	5.....	5.....	5.....
Never.....	6.....	6.....	6.....
Not sure.....	7.....	7.....	7.....

**Q29 ASK IF LANDLINE USED AT Q26 (CODES 1-5)**

**IF ONLY LANDLINE USED AT Q26 (CODES 1-5) AND NOT MOBILE (Q27 NOT CODES 1-5) AND NOT VOIP (Q28 (NOT CODES 1-5) , SUPPRESS TEXT AT END OF QUESTION “rather than your...”**

The last time you used your landline, what was the main reason you chose to use your landline to call other people from home [rather than your [OTHER SERVICES USED AT Q27 AND Q28]]?

**Q30 ASK IF MOBILE USED AT Q27 (CODES 1-5)**

The last time you used your mobile phone, what was the main reason you chose to use your mobile phone to call other people from home rather than your landline?

**Q31 ASK IF VOIP USED AT Q28 (CODES 1-5)**

The last time you used your online calls service like Skype or FaceTime, what was the main reason you chose to use your online calls service to call other people from home rather than your landline?

SINGLE CODE

	Q29	Q30	Q31
Price/ cheaper .....	1 .....	1 .....	1 .....
To use 'free'/ pre-paid/ bundled/ time-specific minutes.....	2 .....	2 .....	2 .....
When I've used up all the 'free'/ pre-paid/ bundled/ time-specific minutes.....	3 .....	3 .....	3 .....
Habit/ always use it.....	4 .....	4 .....	4 .....
Convenience/ ease of use .....	5 .....	5 .....	5 .....
Numbers are stored in the handset .....	6 .....	6 .....	6 .....
To use video/ to see the person I'm calling.....	7 .....	7 .....	7 .....
To send picture/ photos/ emojis in the message.....	8 .....	8 .....	8 .....
When someone else is using the other line .....	9 .....	9 .....	9 .....
When the phone is next to me .....	10 .....	10 .....	10 .....
When I'm in another part of the house.....	11 .....	11 .....	11 .....
When the call is urgent .....	12 .....	12 .....	12 .....
Reliability/ quality of service/ coverage .....	13 .....	13 .....	13 .....
Line/ call quality/ clear .....	14 .....	14 .....	14 .....
To involve more than one person/ contact a group of people .....	15 .....	15 .....	15 .....
Tied into a contract .....	16 .....	16 .....	16 .....
Difficult to switch .....	17 .....	17 .....	17 .....
Someone else pays for this service/ it's free.....	18 .....	18 .....	18 .....
Other – SPECIFY .....	19 .....	19 .....	19 .....

Q32 ASK IF HAVE LANDLINE AT S5 (CODE 3)

SHOWCARD Q32 To what extent do you agree or disagree with the following statement about your landline (home phone)?

“Under certain circumstances, I would be prepared to give up the ability to make and receive calls from my landline”

SINGLE CODE

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

Q33 ASK IF PREPARED TO GIVE UP CALLS AT Q32 (CODES 1-2)

Under which circumstances would you be prepared to give up the ability to make and receive calls from your landline?

DO NOT READ OUT PROBE Which other circumstances?

MULTI CODE

If I didn't need a landline in order to get broadband .....	1
If it reduced the cost of my line rental and I could still get fixed broadband.....	2
If the price of making calls on my landline was too high.....	3
If it was cheaper to use mobiles .....	4
If it was more convenient/ easier to use mobiles .....	5
If it was more convenient/ easier to use online calls/ VoIP/ Skype/ FaceTime .....	6
calls online.....	6
If the reliability of the connection wasn't good enough .....	7
If the quality of customer service wasn't good enough .....	8
Other circumstances - SPECIFY .....	9
Don't know.....	10

**Q34 ASK IF NOT PREPARED TO GIVE UP CALLS AT Q32 (CODES 4-5)**

Why would you not be prepared to give up the ability to make and receive calls from your landline?

DO NOT READ OUT PROBE What other reasons?

MULTI CODE

I need a landline in order to get broadband .....	1
The price of making calls on my landline is low/ good value .....	2
I prefer to make calls from my landline.....	3
Reliability of the connection.....	4
Less convenient/ less easy to use mobiles .....	5
Don't have/ use a mobile.....	6
Less convenient/ less easy to use online calls/ VoIP/ Skype/ FaceTime calls online.....	7
Don't have access to/ use online calls/ VoIP/ Skype/ FaceTime calls online .....	8
Quality of customer service .....	9
No reason to change .....	10
Too much hassle to change .....	11
Habit/ always used landline.....	12
Concerned I could lose my landline number .....	13
Other reasons.....	14
Don't know.....	15

**Q35 ASK IF HAVE MOBILE AT S5 (CODE 1-2)**

Why don't you make all your calls by mobile phone when you're at home instead of using your landline?

DO NOT READ OUT

MULTI CODE

Not applicable – already make all calls by mobile.....	1
Price of calls/ some calls is too high .....	2
Reliability of connection .....	3
Quality of line/ calls.....	4
Coverage/ can't get a good signal.....	5
Inconvenient/ difficult to use.....	6
Concerned about impact on health .....	7
Don't always have credit available to make calls .....	8
Get 'free'/ pre-paid/ bundled/ time-specific minutes on landline .....	9
Other circumstances - SPECIFY.....	10
Don't know .....	11



Q36    **ASK IF USE VOIP AT S5 (CODE 7) AND HAVE LANDLINE AT S5 (CODE 3)**

Why don't you make all your calls by using online call services like Skype or FaceTime when you're at home instead of using your landline?

DO NOT READ OUT

MULTI CODE

- Not applicable – already make all calls this way instead of landline . 1
- Reliability of connection ..... 2
- Quality of line/ calls ..... 3
- Inconvenient/ difficult to use ..... 4
- Not suitable for certain types of conversation ..... 5
- Get 'free'/ pre-paid/ bundled/ time-specific minutes on landline ..... 6
- Other circumstances - SPECIFY ..... 7
- Don't know ..... 8

Q37    **ASK IF HAVE LANDLINE AT S5 (CODE 3)**

How much does your household spend per month on landline services in total?

IF NECESSARY – How much is a typical monthly bill for your home landline calls, line rental and any other landline services?

- ENTER AMOUNT TO NEAREST WHOLE POUND ..... 1
- Don't know ..... 2

Q38    **ASK IF HAVE LANDLINE AT S5 (CODE 3) AND KNOW MONTHLY SPEND AT Q37**

How much of the total landline bill for [SPEND AT Q37] per month is for line rental?

IF NECESSARY – Within the typical monthly bill for your home landline, how much of the charge is for line rental rather than for calls or any other landline services?

- ENTER AMOUNT TO NEAREST WHOLE POUND ..... 1
- Don't know ..... 2

Q39    **ASK IF HAVE LANDLINE AT S5 (CODE 3)**

FOR THOSE GIVING AN ANSWER AT BOTH Q37 AND Q38 THE EXAMPLE £X SHOWN AT Q39 WILL BE 10% OF Q37 MINUS Q38

THOSE WHO DO NOT RESPOND AT Q38 WILL BE SHOWN THE FOLLOWING TEXT AND THE EXAMPLE £X WILL BE 60P

Across the UK, the typical spend on landline calls each month is £6.

**SHOWCARD Q39** If the price of your landline calls increased by 10%, so an extra [£X] each month, how likely would you be to change the way you make calls from home?

When answering, please assume that the price of calls offered by ALL landline call providers would increase by 10%, so there would be no financial benefit in simply switching to another landline provider. Please also assume that mobile, 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 landline.

SINGLE CODE

- We would switch all calls away from landline to another method ..... 1
- We would switch some but not all calls away from landline to another method ..... 2
- This would not have any impact on the calls we make using a landline ..... 3
- Don't know..... 4

Q40    **ASK IF WOULD SWITCH ANY CALLS AT Q39 (CODES 1-2)**

**SHOWCARD Q40** Which of these would you use instead to make calls if the price of landline calls increased by 10%, so an extra [£X] each month?

MULTI CODE

- 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

Q41    **ASK IF WOULD SWITCH ANY CALLS AT Q39 (CODES 1-2)**

Would you rely on [that other method/ those other methods] and give up your landline if the price of landline calls increased by 10% - even if it meant that you couldn't have a fixed broadband service at home, unless this was from Virgin Media?

SINGLE CODE

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

Q42    **ASK IF WOULD NOT SWITCH ANY CALLS AT Q39 (CODE 3)**

Why would you be unlikely to consider taking any action if the price of landline calls increased by 10% so an extra [£X] each month?

DO NOT READ OUT MULTI CODE

- Too much hassle to change ..... 1
- Reliability of the connection..... 2
- Quality of customer service ..... 3
- Habit/ always used landline..... 4
- Alternatives are too expensive ..... 5
- I prefer to make calls from my landline..... 6
- Less convenient/ less easy to use mobiles ..... 7
- Don't have/ use a mobile..... 8
- Less convenient/ less easy to use VoIP/ video calls online ..... 9
- Don't have access to/ use VoIP/ video calls online ..... 10
- Don't trust alternatives..... 11
- 10% is not a large increase/ still affordable ..... 12
- Have landline in a bundled package and don't want to switch/ lose other services.. 13
- Don't use the landline much anyway ..... 14
- I need a landline in order to get broadband..... 15
- Other reasons..... 16
- Don't know..... 17

Q43    **ASK IF HAVE LANDLINE AT S5 (CODE 3)**

FOR THOSE GIVING AN ANSWER AT Q37 THE EXAMPLE £Y SHOWN AT Q43 WILL BE 10% OF Q37

THOSE WHO DO NOT RESPOND AT Q37 WILL BE SHOWN THE FOLLOWING TEXT AND THE EXAMPLE £Y WILL BE £2.30

Across the UK, the typical spend on total landline bills each month is £23.

**SHOWCARD Q43** If the price of your total landline 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 landline providers would increase by 10%, so there would be no financial benefit in simply switching to another landline provider. Please also assume that mobile, 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 landline.

SINGLE CODE

- We would switch all calls away from landline to another method ..... 1
- We would switch some but not all calls away from landline to another method ..... 2
- This would not have any impact on the calls we make using a landline ..... 3
- Don't know..... 4

Q44    **ASK IF WOULD SWITCH ANY CALLS AT Q43 (CODES 1-2)**

**SHOWCARD Q44** Which of these would you use instead to make calls if the price of total landline 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

Q45    **ASK IF WOULD SWITCH ANY CALLS AT Q43 (CODES 1-2)**

Would you rely on [that other method/ those other methods] and give up your landline if the price of total bills increased by 10% - even if it meant that you couldn't have a fixed broadband service at home unless this was from Virgin's cable network?

SINGLE CODE

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

Q46    **ASK IF WOULD NOT SWITCH ANY CALLS AT Q43 (CODE 3)**

Why would you be unlikely to consider taking any action if the price of total landline bills increased by 10% so an extra [£Y] each month?

DO NOT READ OUT MULTI CODE

- Too much hassle to change ..... 1
- Reliability of the connection..... 2
- Quality of customer service ..... 3
- Habit/ always used landline..... 4
- Alternatives are too expensive ..... 5
- I prefer to make calls from my landline..... 6
- Less convenient/ less easy to use mobiles ..... 7
- Don't have/ use a mobile..... 8
- Less convenient/ less easy to use VoIP/ video calls online ..... 9
- Don't have access to/ use VoIP/ video calls online ..... 10
- Don't trust alternatives..... 11
- 10% is not a large increase/ still affordable ..... 12
- Have landline in a bundled package and don't want to switch/ lose other services.. 13
- Don't use the landline much anyway ..... 14
- I need a landline in order to get broadband ..... 15
- Other reasons..... 16
- Don't know..... 17

Q47    **ASK ALL WITH A LANDLINE AT S5 (CODE 3) AND WITH BROADBAND AT S5 (CODE 4)**

**SHOWCARD Q47** If you could buy broadband as a standalone service without needing to have a landline, how likely would you be to still pay for a landline assuming some price drop for the landline service?

SINGLE CODE	Very likely to still pay for a landline service.....	1
	Fairly likely to still pay for a landline service.....	2
	Fairly unlikely to still pay for a landline service.....	3
	Very unlikely to still pay for a landline service.....	4
	Don't know .....	5

Q48    **ASK ALL WITH A LANDLINE AT S5 (CODE 3) AND WITH BROADBAND AT S5 (CODE 4)**

**SHOWCARD Q48** So if you could buy broadband as a standalone service without needing to have a landline...

How much cheaper per month would your landline bill need to be in order for you choose to keep your landline?

IF NECESSARY – So, in pounds, what saving would need to see on your monthly landline bill for you to keep your landline rather than just have broadband and

ENTER AMOUNT IN POUNDS THAT RESPONDENT WOULD WANT AS A SAVING

IF RESPONDENT SAYS IT WOULD NOT NEED TO BE CHEAPER/ THEY WOULD KEEP THEIR LANDLINE/ WOULD NOT CONSIDER ONLY HAVING BROADBAND – ENTER ZERO

IF RESPONDENT IS UNSURE, ENTER 999 FOR DON'T KNOW

Q49    **ASK ALL**

What is your working status?

SINGLE CODE	Working full time (30hrs/wk+).....	1
	Working part time (8-29 hrs/wk).....	2
	Not working (i.e. under 8hrs/wk) – retired .....	3
	Not working (i.e. under 8hrs/wk) – unemployed (registered/ not registered but looking for work).....	4
	Not working (i.e. under 8hrs/wk) – student.....	5
	Not working (i.e. under 8hrs/wk) – housewife/ disabled/ other .....	6
	Don't know .....	7

Q50    **ASK ALL**

Do you or does anyone else in your household operate as self-employed or run a business from your home?

SINGLE CODE	Yes, someone is self-employed .....	1
	Yes, a business is run from home .....	2
	No .....	3

Q51    **ASK IF ANYONE RUNS A BUSINESS FROM HOME/ OPERATES AS SELF-EMPLOYED AT Q50 (CODES 1-2)**

Does that person/ business use the same provider for landline as we talked about earlier for the business – so [Q1]?

IF SAME PROVIDER IS USED – And is that using the same line?

SINGLE CODE	Yes, same landline provider using the same line for both.....	1
	Yes, same landline provider but using a separate line for the business.....	2
	Don't use a landline for the business .....	3
	No, use a different landline provider for the business .....	4
	Don't know .....	5

**Q52 ASK IF DIFFERENT LANDLINE PROVIDER USED AT Q51 (CODE 3)**

Which landline provider is used for the business?

SINGLE CODE	BT .....	1
	Co-op/ Co-operative.....	2
	Demon .....	3
	EE (inc. Orange/ T-Mobile) .....	4
	Fuel Broadband .....	5
	Homecall .....	6
	John Lewis.....	7
	KComm .....	8
	O2 .....	9
	Plusnet.....	10
	Post Office .....	11
	Primus.....	12
	Sky .....	13
	SSE.....	14
	TalkTalk .....	15
	Tesco .....	16
	Three .....	17
	Utility Warehouse .....	18
	Virgin Media.....	19
	Vodafone.....	20
	Other – SPECIFY.....	21
	Don't know .....	22

**Q53 ASK IF ANYONE RUNS A BUSINESS FROM HOME/ OPERATES AS SELF-EMPLOYED AT Q50 (CODES 1-2)**

Does that person/ business use the same provider for broadband as we talked about earlier for the business – so [Q2]?

IF SAME PROVIDER IS USED – And is that using the same line?

SINGLE CODE	Yes, same broadband provider - using the same line for both.....	1
	Yes, same broadband provider but using a separate line for the business.....	2
	Don't use broadband for the business .....	3
	No, use a different broadband provider for the business .....	4
	Don't know .....	5



Q54 ASK IF DIFFERENT BROADBAND PROVIDER USED AT Q53 (CODE 3)

Which broadband provider is used for the business?

SINGLE CODE	BT .....	1
	Co-op/ Co-operative.....	2
	Demon .....	3
	EE (inc. Orange/ T-Mobile) .....	4
	Fuel Broadband .....	5
	Homecall .....	6
	John Lewis.....	7
	KComm .....	8
	O2 .....	9
	Plusnet.....	10
	Post Office .....	11
	Primus.....	12
	Sky .....	13
	SSE.....	14
	TalkTalk .....	15
	Tesco .....	16
	Three .....	17
	Utility Warehouse.....	18
	Virgin Media.....	19
	Vodafone.....	20
	Other – SPECIFY.....	21
	Don't know .....	22

Q55 ASK ALL

What is the **total** number of people in the household (**including respondent and any children**)?

WRITE IN

Q56 ASK ALL

Do you or someone else in your household have power of attorney to manage the landline service on behalf of somebody living elsewhere – perhaps an elderly or disabled relative, friend or neighbour?

SINGLE CODE	Yes.....	1
	No .....	2
	Don't know .....	3

Q57    **ASK ALL**

**SHOWCARD Q57** Please could you say which letter from this card applies to your total household income from all sources, before tax and other deductions?

SINGLE CODE

	Per week	Per Year	
A	<b>Up to £199</b>	<b>Up to £10,399</b>	<b>1</b>
B	From £200 to £299	From £10,400 to £15,599	2
C	From £300 to £499	From £15,600 to £25,999	3
D	From £500 to £699	From £26,000 to £36,399	4
E	From £700 to £999	From £36,400 to £51,999	5
F	£1,000 and above	£52,000 and above	6
		Don't know	7
		Refused	8