

Consumer research to inform
market definition and market
power assessments in the review
of the wholesale broadband
access markets 2006/07

Research Document

Publication date: 21 November 2006

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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 and market power assessment proposals within the *Review of the Wholesale Broadband Access Markets 2006/7: an identification of relevant markets, assessment of market power and proposed remedies*.

The research was carried out with both residential and business consumers using the internet. The main focus of the research was asymmetric broadband¹ usage and views relating to this amongst those who used either ADSL or cable as their method of connecting to the internet². Research into the behaviour and views of consumers who use narrowband and leased line/SDSL services was also carried out to provide useful context.

This research aimed to:

- understand the choices and decision making of consumers regarding their method of connecting to the internet (including the importance of various features of internet services, barriers to switching services and how consumer choices may change in the future), and to
- assess potential switching behaviour if consumers were faced with 'small but significant non-transitory increases in price' (SSNIP) to inform market definition³

The research was carried out in two parts; a main study in February/March 2006 and a follow-up study in June 2006⁴. See section 1.4 for full details on the methodology and annex 1 for the research questionnaires.

1.2 Summary of key findings

Some of the key findings of this research were:

- Residential broadband consumers claim their total monthly cost for their internet service is lower and have had their service for a shorter time period than business consumers that use broadband
- Residential and business broadband consumers do not always know the exact speed of their current internet connection

¹ Asymmetric broadband is broadband where the speed of data transfer upstream is slower than downstream.

² 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.

³ 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.

⁴ Ofcom acknowledges that the research carried out is not sufficient alone to draw definitive conclusions across all aspects of wholesale broadband access. Ofcom therefore intends to conduct further consumer research before the next stage of consultation on the Review of the Wholesale Broadband Access Markets 2006/7.

- Overall perceived importance of the internet differs between types of consumer; business consumers of leased lines/SDSL services are mostly likely to see this as essential to their business whilst residential consumers using narrowband internet connections are least likely to say the internet is important to them personally
- Reliability of service is critical to nearly all broadband consumers whether businesses or residential consumers
- Residential broadband consumers are more likely than business consumers to rate connection speed and low costs as being particularly important.
- Business consumers are more likely to rate having an 'always on' connection as being critical
- The majority (around 8 in 10) of both residential and business consumers using broadband see being able to make calls at the same time as having internet access as key
- 54% of business consumers using broadband and 62% of residential consumers using broadband say they have used a different internet connection type in the past; this was likely to have been some form of narrowband connection
- 15% of business consumers and 37% of residential narrowband consumers claim they intend to change their internet connection method in the next 12 to 18 months
- A minority of broadband consumers agree that 'there are good alternatives to broadband at the moment' (22% of business consumers and 25% of residential consumers)

Consumers were also faced with various different scenarios involving possible price increases to internet connections. Responses to these scenarios differ depending on the type of internet connection(s) currently used by the consumers, the range of services that are affected by the increase and the magnitude of increase. Full details of the responses to these scenarios are outlined in section 5 of this document.

1.3 Structure of the research

This report outlines the findings of the research with both residential and business consumers. Section 2 looks at basic information about the types of internet connections users have and section 3 focuses on what it is about internet connections that consumers consider important. Section 4 looks at any previous switching between connection types and plans to switch in the future and section 5 looks at consumers' claimed reactions to possible future increases in price of internet access.

1.4 Research methodology

Initial research with residential and business consumers was completed in February/March 2006. Fieldwork was carried out over the telephone using computer assisted interviewing (see annex 1 for the full questionnaire).

The residential consumer research resulted in 511 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; 411 respondents with asymmetric 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. Weighting was then applied to ensure the sample was broadly representative in terms of cabled versus non-cabled areas and socio-economic grades as all other key characteristics were similar to the population generally.

The business research sample comprised 707 interviews and was carried out with a person within each business who was responsible for deciding on telecommunication and internet connections. The main connection type of the businesses was as follows; 459 with asymmetric broadband, 99 with narrowband (ISDN or dial-up connections) and 149 users of either leased lines or SDSL.

The business sample was identified via a sample of telephone numbers from Sample Answers⁵. 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 on both of these factors, as well as two geographic variables (cabled versus non-cabled areas and region), to ensure the final data was generally representative of the market⁶.

Following the main interviewing in February/March 2006 broadband consumers within the initial sample were re-contacted⁷ to ask them more specific questions relating to small but significant non-transitory increases in price (SSNIPs). The follow-up questionnaire can be found in annex 1. All of the data collected in February/March was therefore held for these consumers and the new data collected in June 2006 was available to append to this. The sample sizes for this follow-up research were smaller than the original sample with 169 business consumers and 131 residential consumers taking part in total. Again weighting was applied to give broadly representative samples of UK consumers.

All sections of this document except 5.7 to 5.9 report data from the main study whilst these sections contains data from the additional study carried out in June 2006.

All research was carried out by Jigsaw Research Ltd.

Research data is reported with unweighted and weighted bases shown. 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 10% then the true result is likely to fall between 4% and 16% (that is + or – 6%).

Table A1.1

% Survey response	Base size		
	400	100	50
10%	+/-3%	+/-6%	+/-8%
20%	+/-4%	+/-8%	+/-11%
50%	+/-5%	+/-10%	+/-14%

⁵ Sample Answers is a sampling agency that specialises in providing business and consumer samples for research purposes

⁶ The data from leased lines users is shown in isolation to the users of other types of connection for comparative purposes. This data has not been weighted.

⁷ Respondents were only re-contacted if they originally indicated that they were happy to be re-contacted in the future for research purposes

Section 2

Internet service details

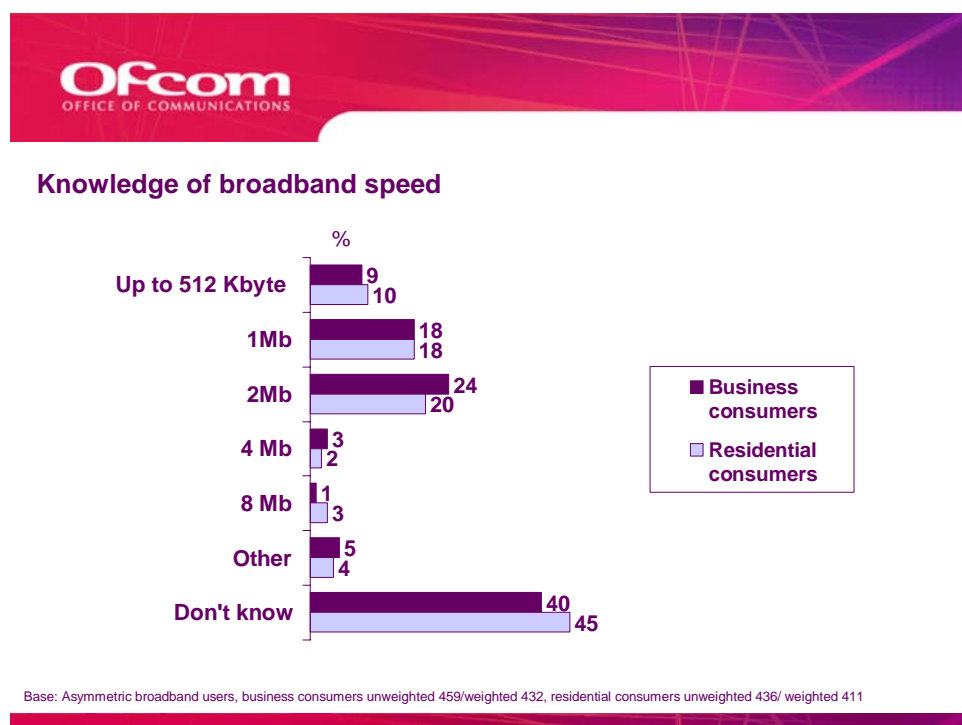
In order to obtain background information consumers were asked general questions on their use of internet connections and the characteristics of these.

2.1 Contextual information about internet connections

Asymmetric broadband

When asked what connection speed their broadband internet service was, 40% of the business consumers and 45% of the residential consumers said they did not know⁸. 42% of the business consumers believed their service was 1Mbit/s or 2Mbit/s and 38% of the residential consumers claimed to receive this speed (see Figure 1).

Figure 1



In response to a separate question, the research found that the majority of both groups said they had an unmetered broadband package, that is they have unlimited downloads (92% of business consumers and 83% of residential consumers).

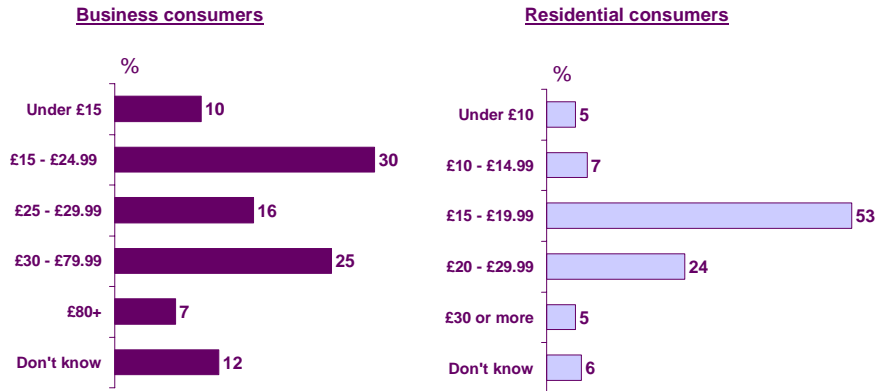
Business consumers also claimed to pay their broadband bills monthly (66%) or quarterly (27%) and there is a wide variation in spend on this (see Figure 2). Residential consumers typically pay bills monthly (88%). Just over half of residential consumers (53%) say they pay between £15.00 and £19.99 and 24% say they pay between £20.00 and £29.99 per month (see Figure 2).

⁸ Bases for this section: business consumers unweighted 432/unweighted 459, residential consumers unweighted 436/ weighted 436

Figure 2



Claimed monthly spend on broadband (including VAT)



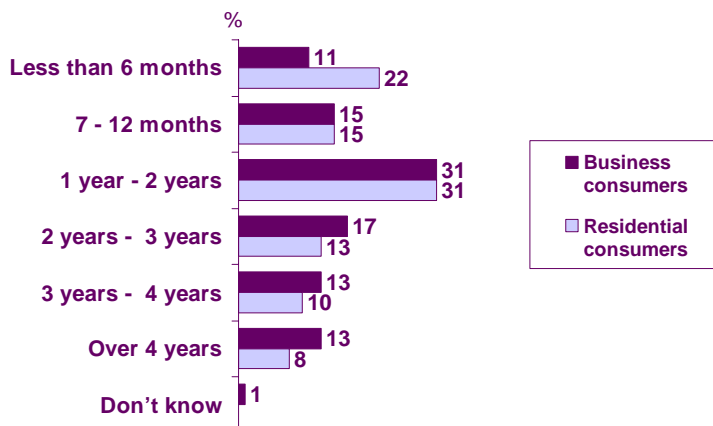
Base: Asymmetric broadband users, business consumers unweighted 459/weighted 432, residential consumers unweighted 436/ weighted 411

Figure 3 shows the length of time consumers say they have had their broadband connection. Around a quarter (26%) of business consumers and 37% of residential consumers claim to have had their current broadband connection for a year or less.

Figure 3



Length of time had current broadband connection

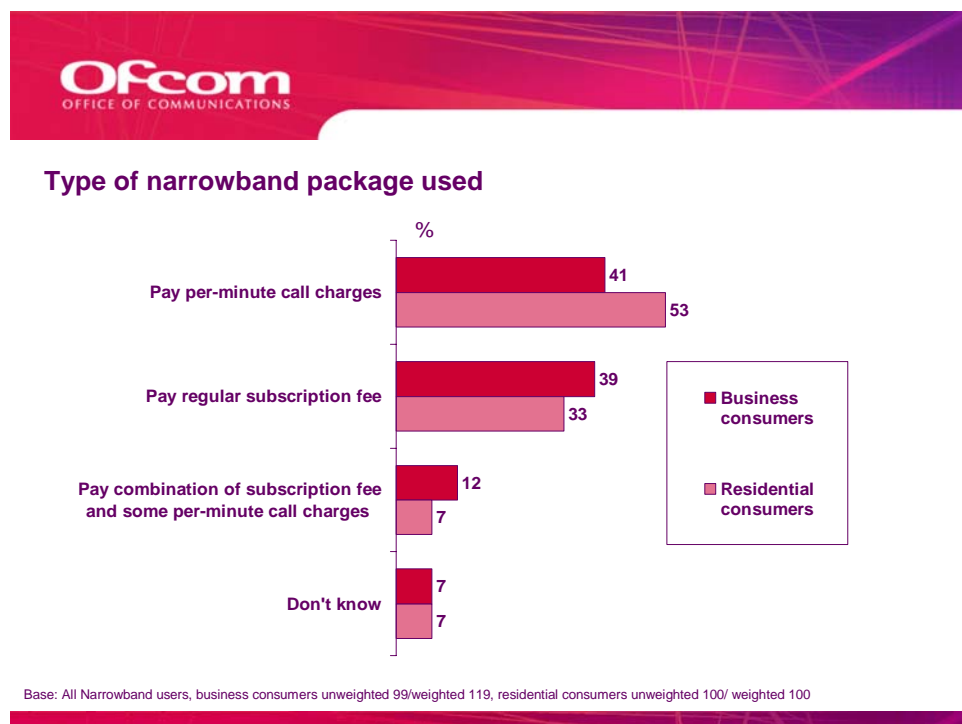


Base: Asymmetric broadband users, business consumers unweighted 459/weighted 432, residential consumers unweighted 436/ weighted 411

Narrowband

Narrowband consumers were asked what type of package they used and their responses are shown in Figure 4. 41% of business consumers said they pay per-minute charges and 39% pay a regular subscription fee. Around half (53%) of the residential consumers said they pay per-minute charges whilst a third claimed they paid a regular subscription fee.

Figure 4



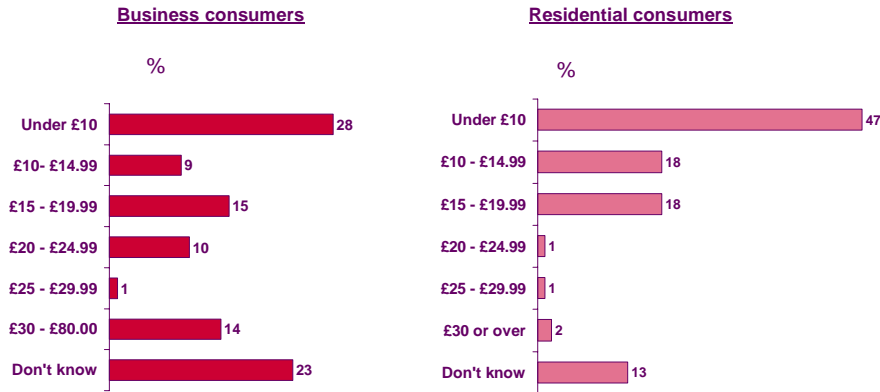
The research also found that around 6 in 10 narrowband consumers pay their internet bills monthly (59% of business users and 63% of residential users) whilst fewer pay quarterly (30% of business users and 26% of residential users).

From Figure 5 it can be seen that there is a fair degree of uncertainty regarding monthly cost of the internet amongst business narrowband internet consumers (23% say they do not know the cost). There are a range of responses in terms of the monthly costs of narrowband amongst business consumers that were able to respond with 25% saying under £10.00, 35% between £10.00 and £29.99 and 14% saying that they spend over £30. Residential consumers claimed narrowband costs tend to be lower than business consumers' costs with 47% saying that they spend under £10.00 and 36% saying between £10.00 and £19.99 (see Figure 5).

Figure 5



Claimed monthly spend on narrowband (including VAT)



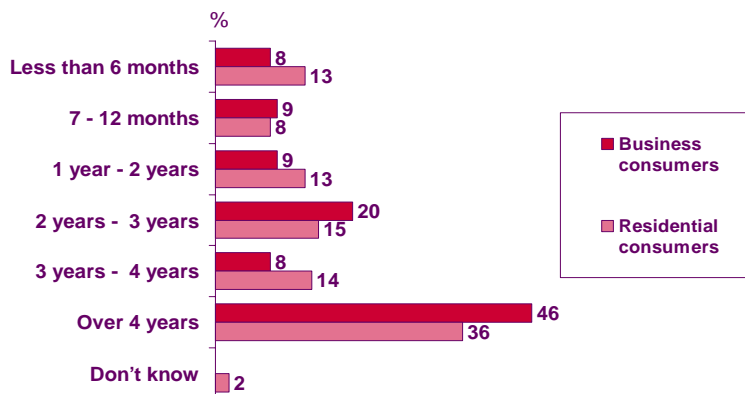
Base: All Narrowband users, business consumers unweighted 99/weighted 119, residential consumers unweighted 100/ weighted 100

Figure 6 shows the length of time narrowband consumers say they have had their current connection for. 46% of business consumers claim to have had their current narrowband connection for 4 years or more and this is the case for 36% of residential consumers. More narrowband consumers have had their connection for 4 years or more, whilst broadband consumers tend to have gained their connection more recently (comparing Figure 6 with Figure 3).

Figure 6



Length of time had current narrowband connection



Base: All Narrowband users, business consumers unweighted 99/weighted 119, residential consumers unweighted 100/ weighted 100

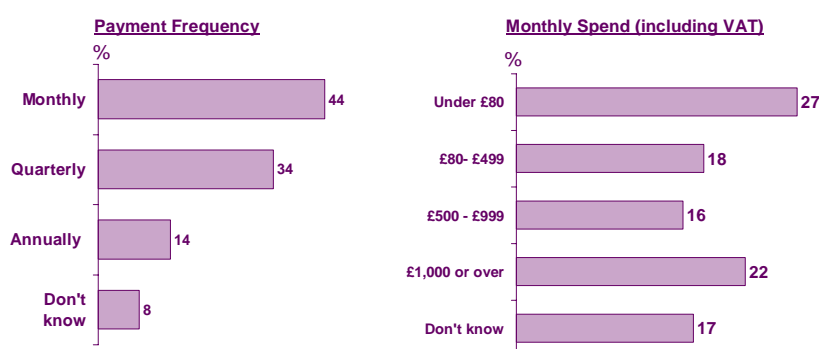
Leased lines/SDSL

Just over a third (34%) of business consumers with leased lines or SDSL as their main internet connection, claim they pay for these quarterly whilst 44% say they pay monthly. Figure 7 shows that the range of spend on these varies widely with 27% paying under £80 per month and 22% paying over £1000 per month. 18% do not know how much they pay for the connections.

Figure 7



Claimed spend on leased lines/SDSL



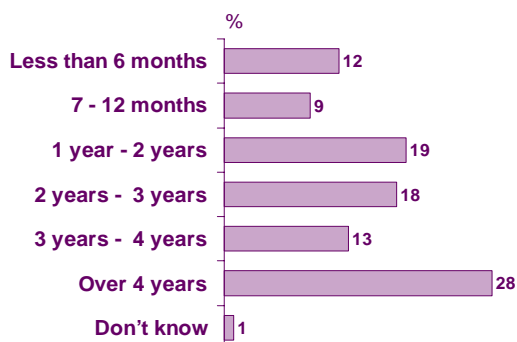
Base: All Leased Line/SDSL users, unweighted 142

When business consumers were asked how long they have had their current leased line or SDSL connection, 21% claimed they had had these for a year or less, 50% between a 1 year and 4 years and 28% claimed they had used these for over 4 years (see Figure 8).

Figure 8



Length of time had current leased lines/SDSL connection



Base: All Leased Line/SDSL users, unweighted 142

Section 3

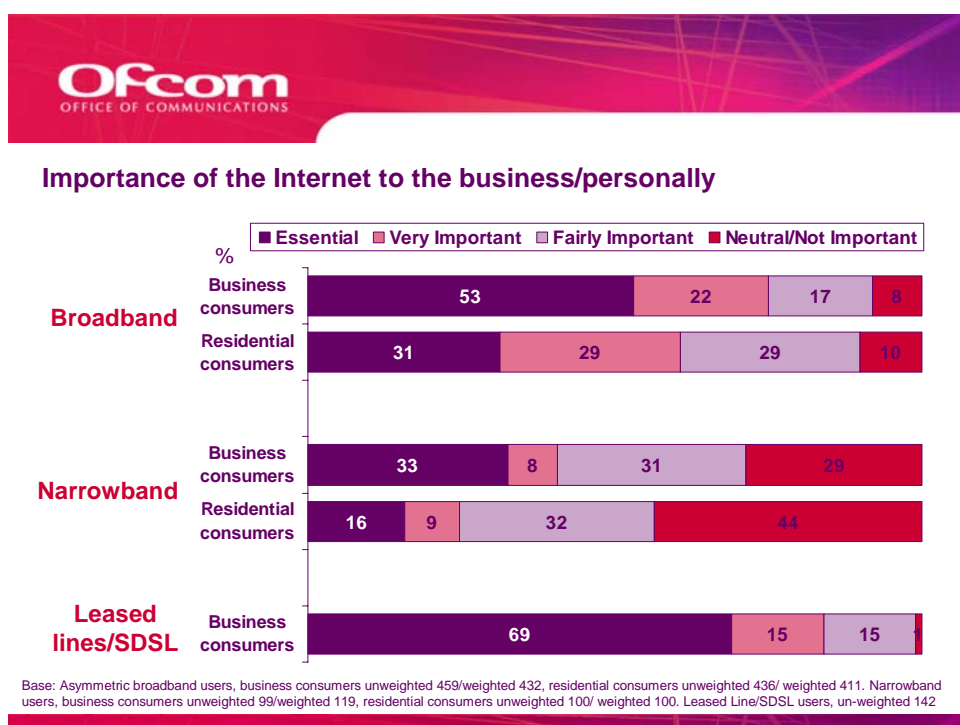
Important features of internet connections

Consumers were asked how important the internet is to their business or to them personally and also more detailed questions to identify *what* about the internet and their connection is particularly important. These questions were asked in order to provide useful context for the information gathered on what course of action consumers would consider if faced with a price rise for their service (section 5).

3.1 Perceived importance of the internet

Figure 9 sets the scene and shows how important business and residential users consider the internet to be, for different connection types. Residential consumers using narrowband as their main connection type are least likely to say the internet is essential to them (16%) whilst a third of business consumers using narrowband claim this. Users of asymmetric broadband are more likely to say this is essential than users of narrowband (residential consumers 31% vs. 16% and business consumers 53% vs. 33%). Business users of leased lines or SDSL are most likely to say that the internet is essential with 69% claiming this.

Figure 9



3.2 Important features of internet connections

Figures 10 to 12 show the features of internet connections that consumers' rate as particularly important (defined as being given a rating of 8 to 10 out of 10, where 1 is not at all important and 10 is extremely important).

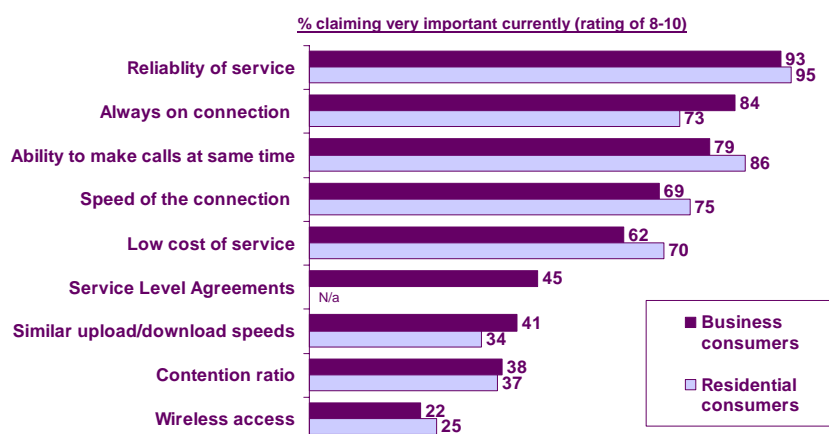
Figure 10 looks at asymmetric broadband consumers and shows that reliability of service is very important to nearly all of these; 93% of business consumers and 95% of residential consumers consider this to be important.

Residential users are more likely to consider that speed and low cost are important compared with business users. Whereas business consumers are more likely to consider that the 'always on' feature of the connection is important compared with residential consumers. Around 8 in 10 of both residential consumers (79%) and business consumers (86%) said that the ability to make calls at the same time as having internet access is important.

Figure 10



Important features of an Internet connection: broadband



Base: Asymmetric broadband users, business consumers unweighted 459/weighted 432, residential consumers unweighted 436/ weighted 411

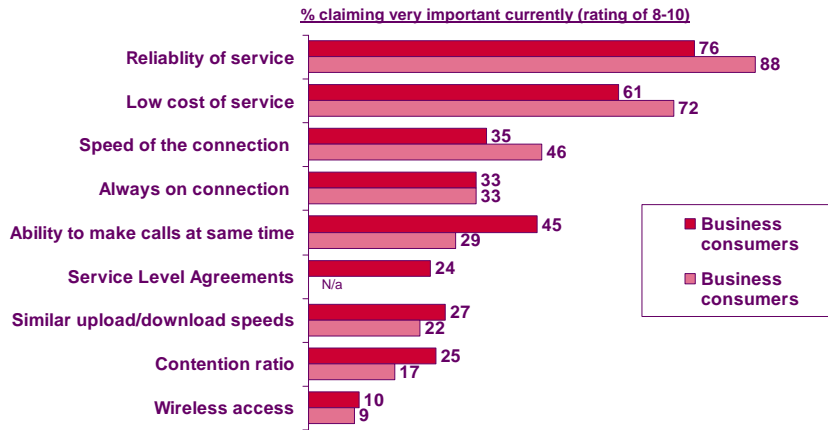
Amongst broadband users, 5 out of the 10 features asked about were considered to be important by at least half of the group. However, amongst narrowband users only 2 features are considered to be important (see Figure 11).

Reliability of service (residential 88%, business 76%) and having a low cost service (residential 72%, business 61%) were the elements rated as important for the majority of users.

Figure 11



Important features of an Internet connection: narrowband



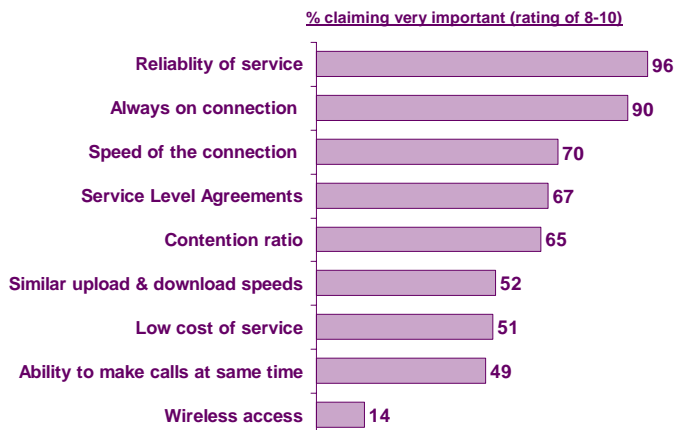
Base: All Narrowband users, business consumers unweighted 99/weighted 119, residential consumers unweighted 100/ weighted 100

Figure 12 shows that nearly all of business consumers with leased lines or SDSL connections rate reliability of the service (96%) and having an always on connection (90%) as important elements of their internet connections. Speed of connection (70%), service level agreements (67%), contention ratios (65%) and uploading and downloading speeds are mentioned by half or more of the sample as important.

Figure 12



Important features of an Internet connection: leased lines/SDSL



Base: All Leased Line/SDSL users, unweighted 142

3.3 Important services to use with/through an internet connection

Consumers were also asked to rate how important it was for their business or to personally be able to *do* or *use* certain things through their internet connection. Again they were asked to rate using a 10 point scale where 1 was not at all important and 10 was extremely important and a rating of 8 to 10 on this scale is reported as a indicating that something is particularly important in this section.

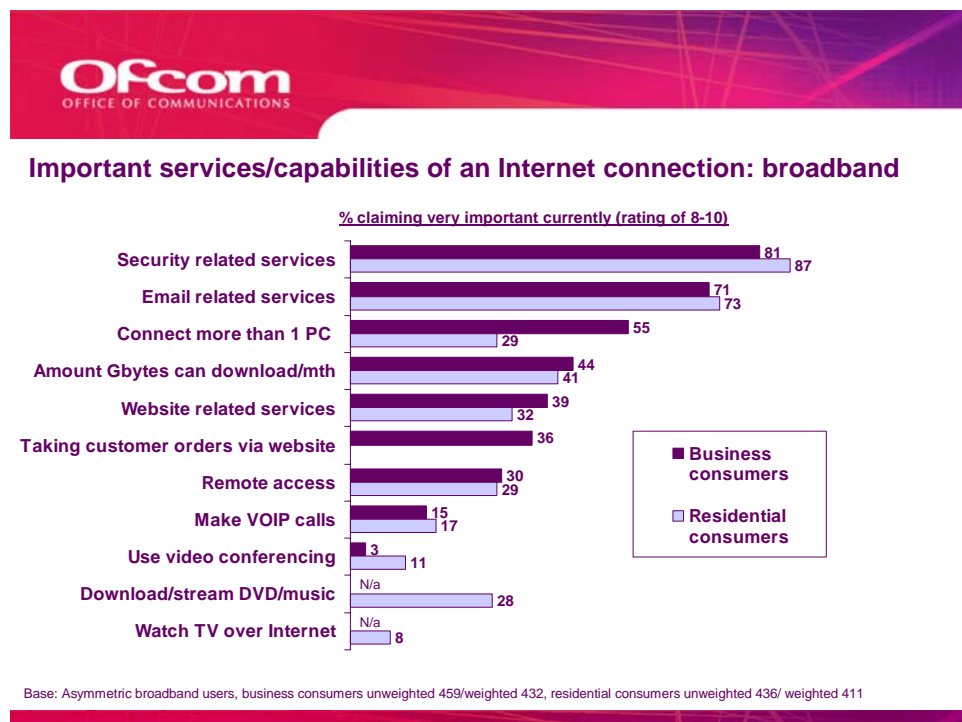
Being able to use security related services (e.g. firewall, antivirus, antispam) and email related services (e.g. amount of free mailboxes, choice of email addresses, domain names) are the things that most asymmetric broadband users saw as important to be able to use with at least 7 out of 10 of both residential and business consumers rating these as particularly important (see Figure 13).

Connecting to more than one PC was more likely to be rated as important by business broadband consumers than residential broadband consumers (55% vs. 29%) and the same was true for website related services (39% vs. 32%). Just over a third (36%) of business consumers also claimed that taking customer orders via a website was also important.

Downloading music/DVDs was rated highly by 28% of residential broadband consumers and 8% rated watching the TV over the internet highly.

The amount of Gigabytes or data that can be downloaded per month is seen as important by 44% of business consumers and 41% of residential consumers.

Figure 13

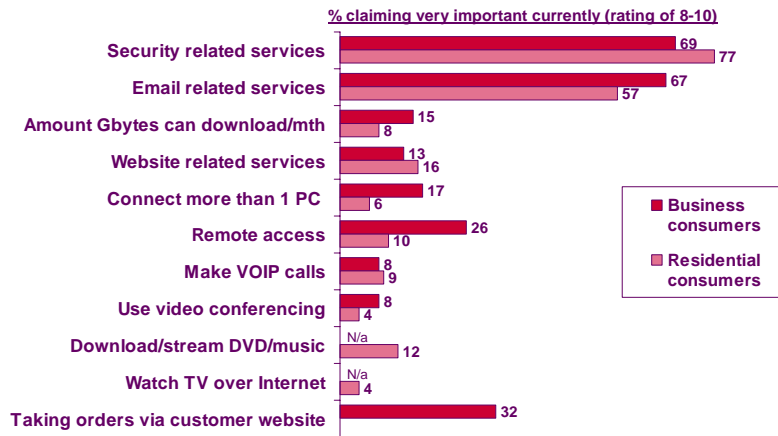


Whereas a range of capabilities or services are mentioned as important by 30% or more of the asymmetric broadband consumers, only security related services and email related services were mentioned as vital features by this proportion of both residential and business narrowband users (see Figure 14). Security related services were rated as important by 69% of business consumers and 77% of residential consumers. Email related services were rated as important by 67% of business consumers and 57% of residential consumers. 'Taking orders via a website' is mentioned as important by 32% of business consumers.

Figure 14



Important services/capabilities of an Internet connection: narrowband



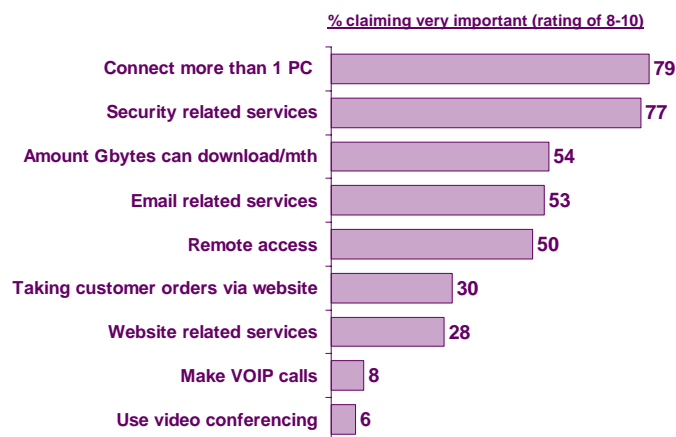
Base: All Narrowband users, business consumers unweighted 99/weighted 119, residential consumers unweighted 100/ weighted 100

Figure 15 shows that business consumers with leased lines or SDSL are most likely to rate 'connecting to more than one PC' and security services as very important with 79% and 77% rating these as very important (see Figure 15).

Figure 15



Important services/capabilities of an Internet connection: leased lines/SDSL



Base: All Leased Line/SDSL users, unweighted 142

Although this data is not shown in the charts here consumers were also asked to rate how important these services or capabilities might be in the *future* using a 10 point scale⁹. Analysis compared the proportion of consumers rating each service as highly important now and in the future (rating 8 to 10 out of 10).

Amongst business users of asymmetric broadband, the two elements most likely to increase in perceived importance were VoIP (15% to 22%) and video conferencing (3% to 11%). Amongst business users of leased lines/SDSL, these elements also increased in importance (VoIP 8% to 23% and video conferencing 6% to 11%). Business users of narrowband were most likely to report an increase in the importance of security related services in the future (69% to 78%).

Residential consumers did not report any significant increases in the likely importance of services or capabilities in the future.

⁹It is acknowledged that this is potentially a difficult task for research respondents (e.g. it may be difficult to imagine the potential of different services, the developments of technology or the accessibility of services in the future)

Section 4

Historical switching and plans to switch

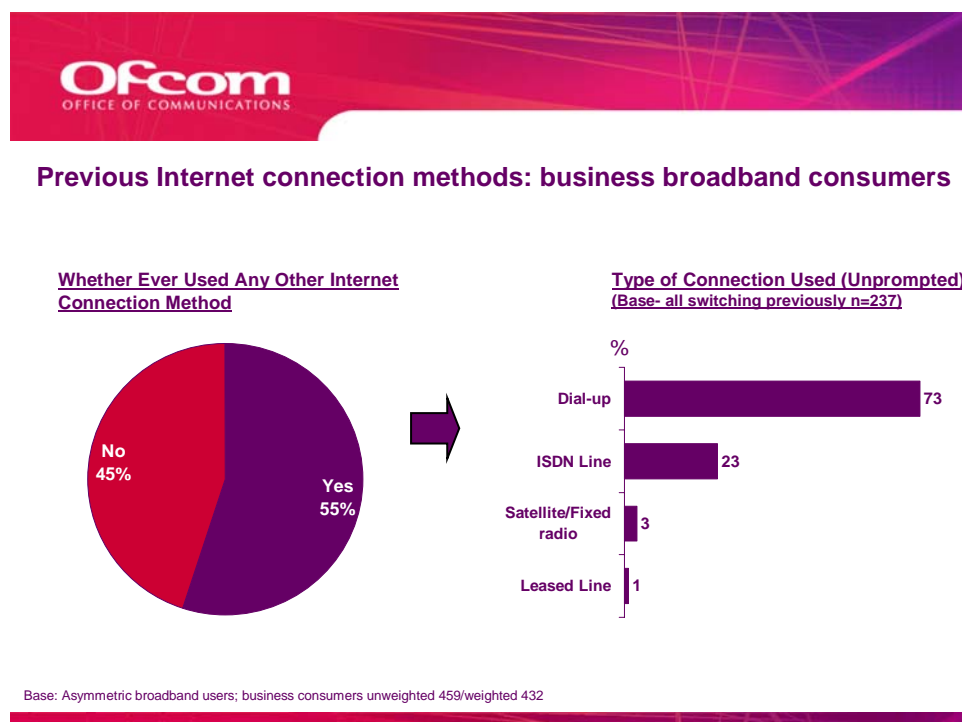
To provide further context consumers were also asked about previous switches they had made between internet connection types and their intention to switch in the future.

4.1 Previous connections and switching

Figures 16 to 19 identify if consumers had ever used a different method of connecting to the internet.

Around half of the business asymmetric broadband users (55%) had previously used an alternative connection method. Typically this was a dial-up narrowband connection with 73% saying this although 23% had previously used an ISDN line (see Figure 16).

Figure 16



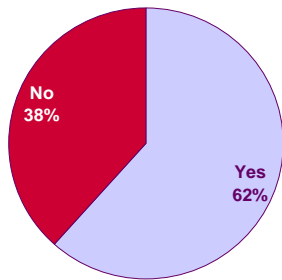
62% of residential asymmetric broadband users claim to have previously used a different connection method, which tended to be a dial-up narrowband connection (93% of those who had used a different connection method previously) (see Figure 17).

Figure 17

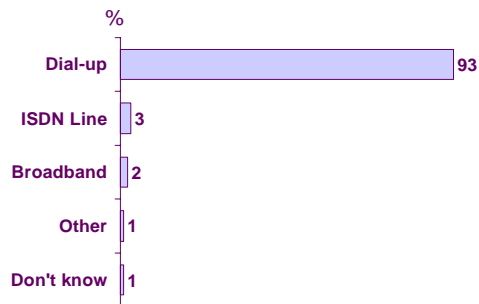


Previous Internet connection methods: residential broadband consumers

Whether Ever Used Any Other Internet Connection Method



Type of Connection Used (Unprompted)
(Base - all switching previously n=252)



Base: Asymmetric broadband users; residential consumers unweighted 436/ weighted 411

The majority of narrowband consumers had never used any method other than narrowband to connect to the internet; 86% of business consumers and 89% of residential consumers claim this (see Figure 18).

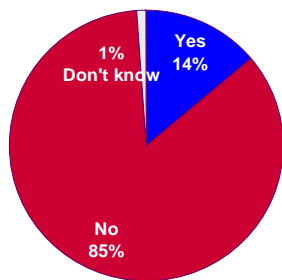
Figure 18



Previous Internet connection methods: narrowband consumers

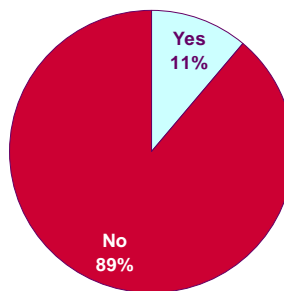
Business consumers

Whether Ever Used Any Other Internet Connection Method



Residential consumers

Whether Ever Used Any Other Internet Connection Method

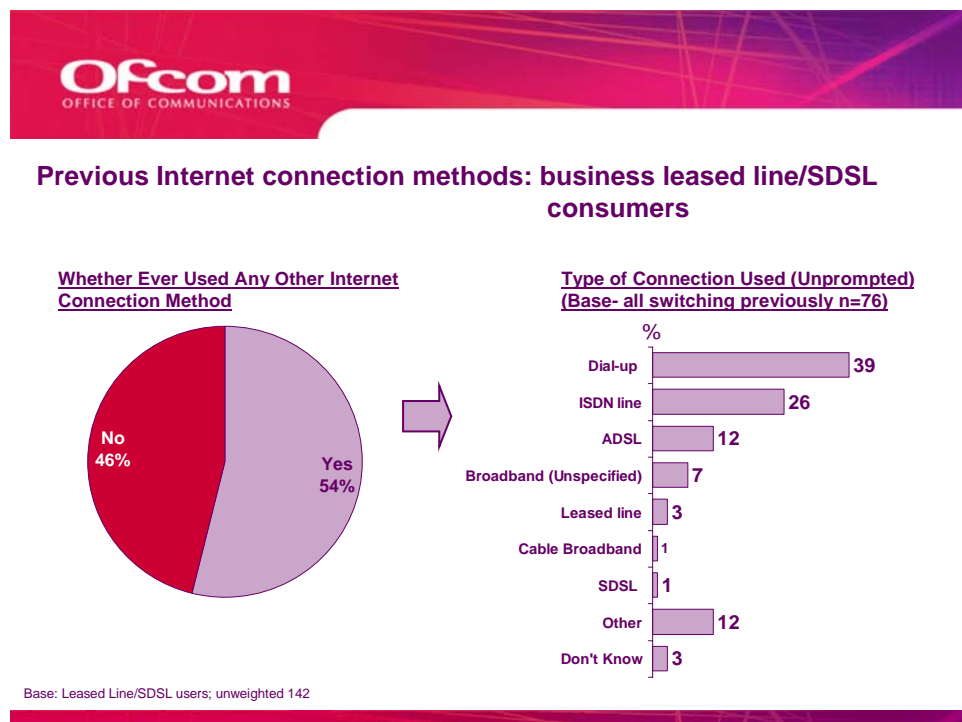


Base: Business narrowband users; weighted 119, unweighted 99

Base: Residential Narrowband users; weighted 100, unweighted

Around half of business consumers using leased lines/SDSL had previously used an alternative connection method, typically a narrowband connection with 39% saying dial-up and 26% saying ISDN line (see Figure 19).

Figure 19



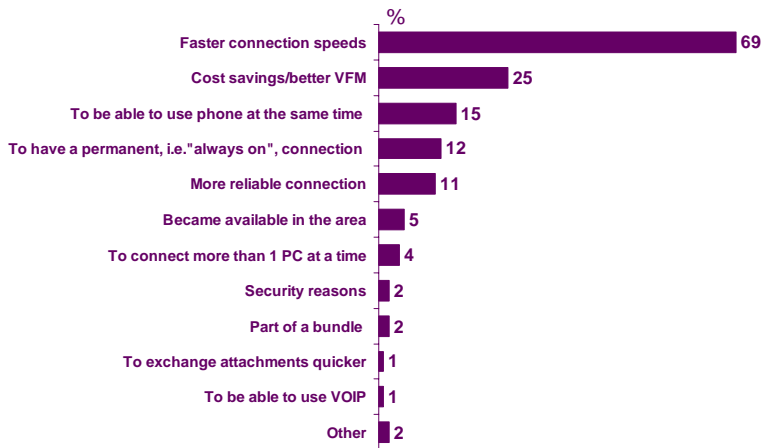
Figures 20 and 21 below show the reasons consumers gave for changing their internet connection to broadband.

69% of business consumers using asymmetric broadband claim that the faster connection speeds were a key driver of switching to broadband. Cost was a reason for cited by a quarter of business consumers. Being able to use the phone at the same time, having an 'always on' connection and a more reliable connection were also given as reasons for 15%, 12% and 11% of business consumers respectively.

Figure 20



Reasons for Switching To Broadband (Unprompted): business consumers



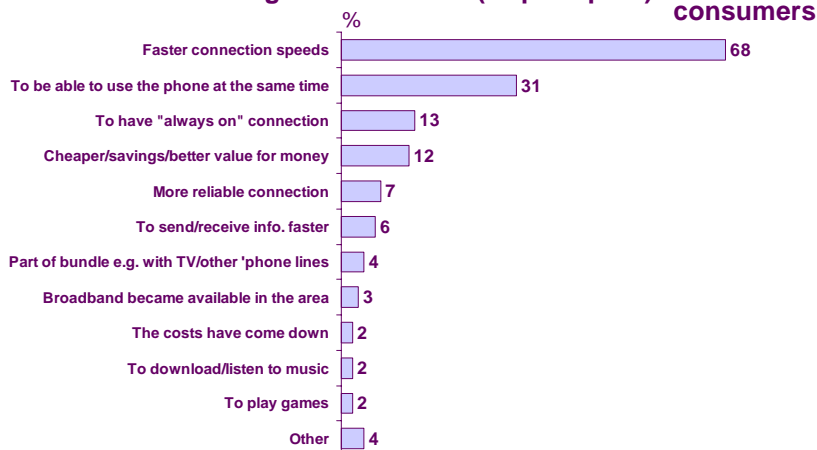
Base: Businesses using broadband who used a different connection method previously: 233 weighted, 281 unweighted

Faster connection speeds were also claimed as a reason for a considerable proportion of residential consumers switching to broadband (68% mentioned this) (see Figure 21). Cost/value for money was not mentioned by as many residential as business consumers (12% vs. 25%) whilst being able to use the phone at the same time as connecting to the internet was mentioned as a reason for changing connection type by 31% of residential consumers in comparison to 15% of business consumers.

Figure 21



Reasons for Switching To Broadband (Unprompted): residential consumers



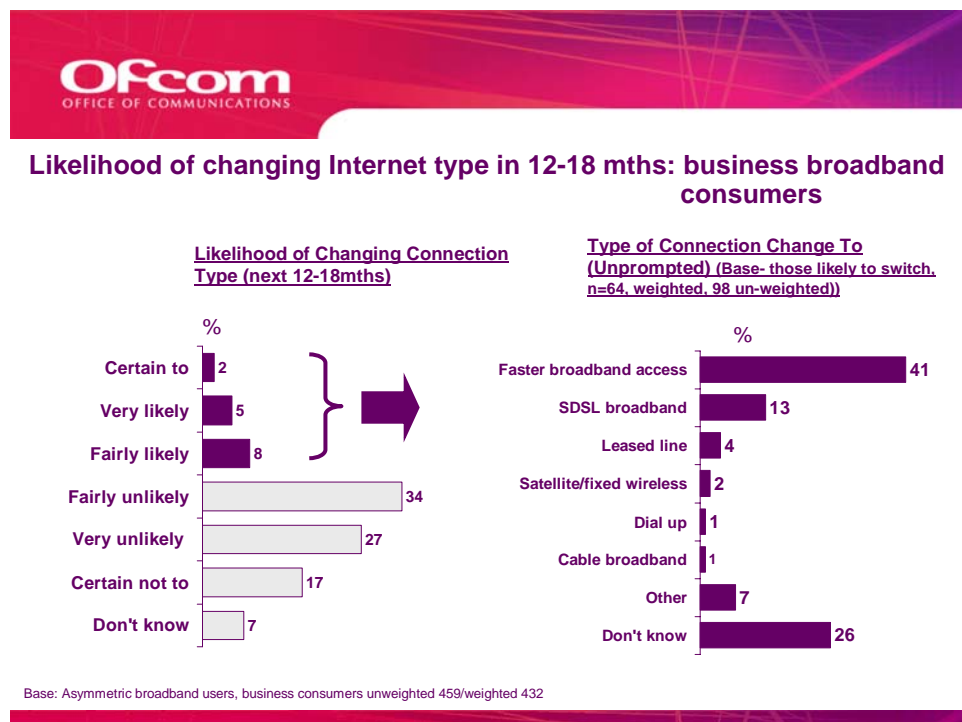
Base –Residential broadband users who used a different connection method previously; weighted 205, unweighted 198

4.2 Intention to change internet connection type

Consumers were asked how likely the business or household was to change the type of internet connection in the next 12 to 18 months. Responses are shown in Figures 22 to 24.

15% of business consumers using broadband claimed that they were likely or certain to change their connection method in the next 12 to 18 months. When asked what type of connection those who intent to change they might instead use, 41% of those intending to change method said a faster broadband connection, 16% were not sure and 13% said SDSL (see Figure 22).

Figure 22

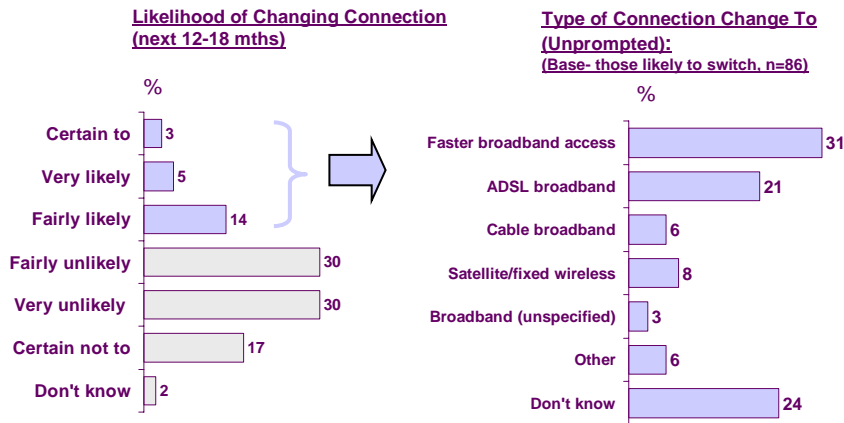


A greater proportion of residential broadband consumers claimed that they were likely to or certain to change their connection method in the next 12-18 month (see Figure 23). Around a quarter (26%) of those planning to change connection type were not sure of what connection they would change to whilst 31% intend to move to a faster connection and 13% intend to move to ADSL broadband.

Figure 23



Likelihood of changing Internet type in 12-18 mths: residential broadband consumers



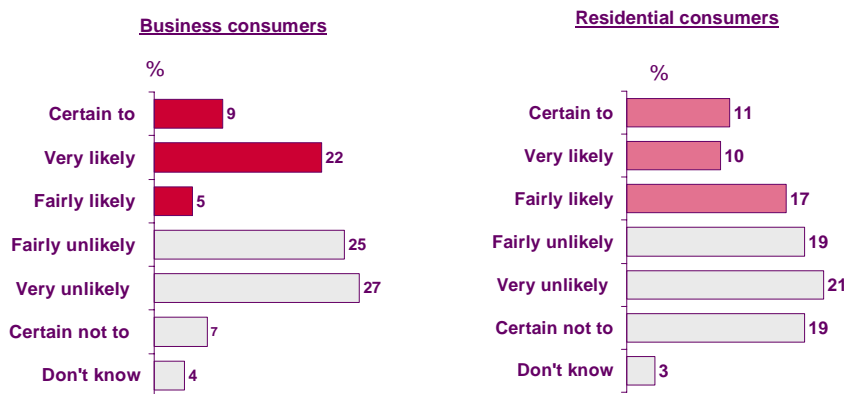
Base: Asymmetric broadband users; residential consumers unweighted 436/ weighted 411

Over a third (37%) of business consumers using narrowband and residential consumers (38%) using this said they were likely to or certain to change their connection method in the next 12-18 months. This data is shown in Figure 24.

Figure 24



Likelihood of changing Internet type in 12-18 months: narrowband consumers



Base: All Residential Narrowband users (100)

Narrowband consumers who claimed they were certain to or very likely to change internet connection type in the next year or year and a half were asked what type of connection they thought they would move to. Although this is based on a small sample, of the 43 business

consumers asked this, 38 said they would move to some form of broadband and of the 39 residential consumers, 34 also said they would switch to broadband.

If consumers were not planning to switch their connection type they were asked what things put them off or prevent them from switching. Business broadband users most frequently cited satisfaction with current connection (49%), that changing is too much trouble/hassle (13%) and that the alternative would cost more money (10%). These were also the main reasons given by residential broadband customers; satisfaction with current connection (29%), that changing is too much trouble/hassle (15%) and that the alternative would cost more money (13%).

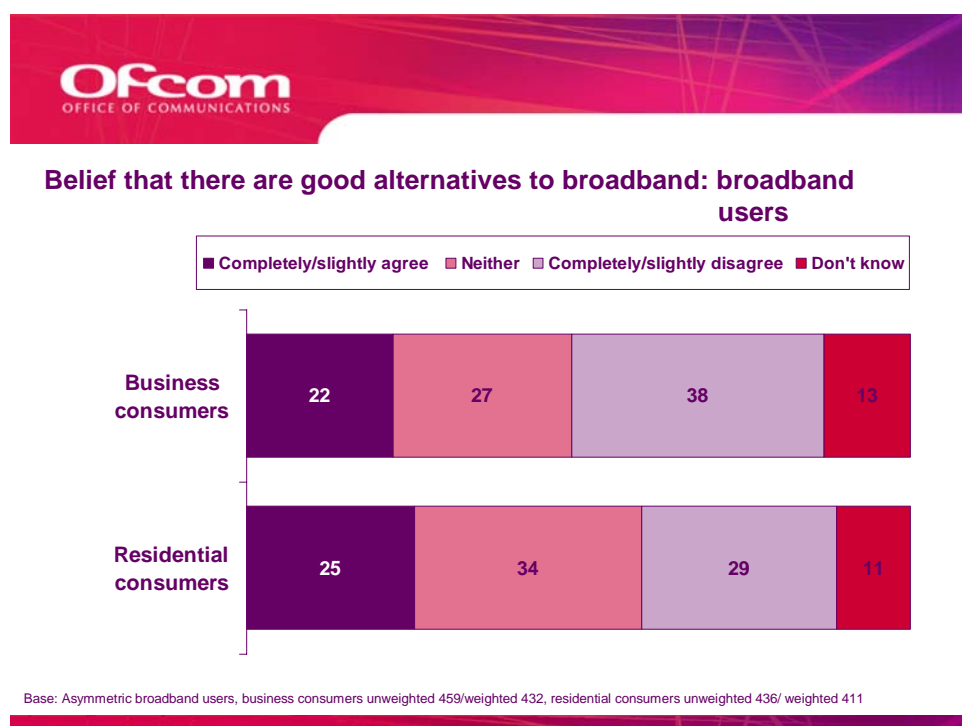
Narrowband business users most frequently cited reasons for not switching connection type were again satisfaction with current connection (28%), that the alternative would cost more money (24%) and also that they do not use the internet enough to justify a change (15%). The main reason given by residential narrowband users was that the alternative would cost more money (32%), whilst satisfaction with current connection was mentioned by 24% and they do not use the internet enough to justify a change was mentioned by a similar amount (23%).

4.3 Perceived alternatives to broadband

Broadband users were asked to what extent they believed that there ‘are good alternatives to broadband at the moment’. Responses to this question are shown in Figure 25. One in five (22%) of business consumers with broadband agreed that there are good alternatives to broadband. Business consumers with broadband were less likely to agree than disagree with this (22% vs. 38%). The remaining 40% did not have a strong opinion on this.

The residential consumers were less likely than the business users to disagree with the statement that there are ‘good alternatives to broadband’ with 29% of residential consumers saying this in comparison to 38% of business consumers, thus meaning that more business consumers feel strongly that there are good alternatives are *not* available at the moment.

Figure 25



Section 5

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).

5.1 Questions asked

The research asked a variety of questions which focus on slightly different 'small but significant non-transitory increases in price' (SSNIPs).

The initial survey asked asymmetric broadband consumers what they thought they would do if they were faced with a price increase of 5% and 10% across all companies that provide their particular type of internet service at their particular speed of connection. They were also told to assume the increase in price was *only* for that speed of internet connection.

For context, questions were also asked to narrowband customers about what they considered they would also do if faced with a price increase of 5% and 10% across all companies that offer their type of narrow band internet service.

In addition, narrowband users who claimed they were likely to change to broadband in the next 12-18 months anyway (irrespective of any changes in price) were asked what they thought their intentions would be regarding switching to broadband if the price of broadband were to increase by 10%.

The survey in June 2006 focused on increases in price for asymmetric broadband customers and those with SDSL/leased lines and asked what consumers would do if there was a 10% price increase across particular connection types as a whole (including all speeds of connection within the connection type. Initially consumers were asked what they thought they would do if there was an increase in price in their connection type only (i.e. ADSL or cable). They were also then asked what they might do if *both* ADSL and cable connection types increased in price. Finally consumers were asked what they thought they would do if there was an increase in price across *all* broadband connection types (including ADSL, cable, SDSL and satellite connections).

For the full question wording and details explained to consumers see annex 1.

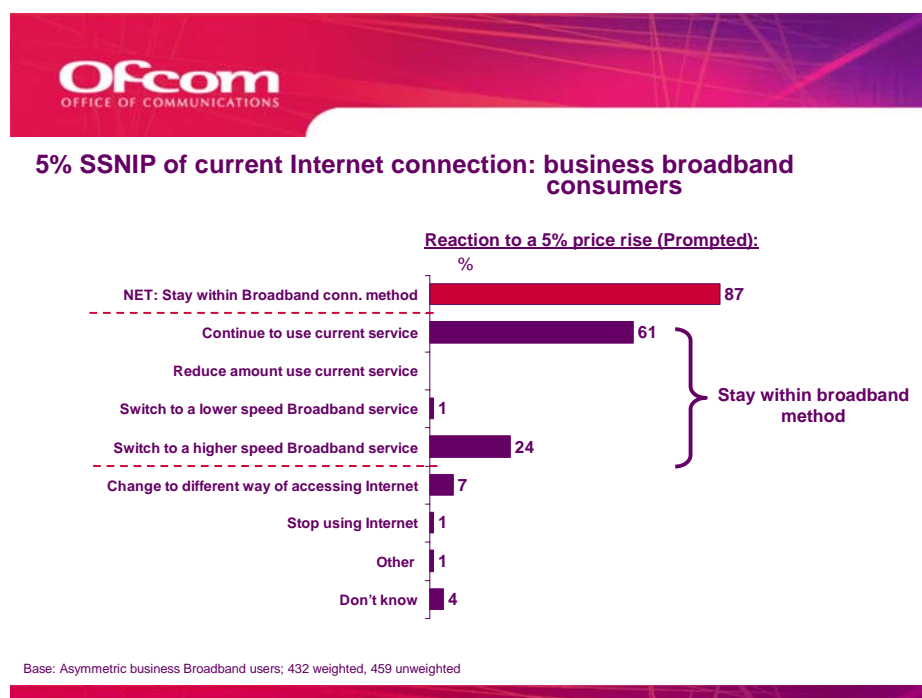
The results are outlined below.

5.2 5% SSNIP for Broadband consumers (price increase on current speed for all companies)

If faced with a 5% price increase on the broadband services at the speed of connection they currently used 61% of business consumers using asymmetric broadband claimed they would

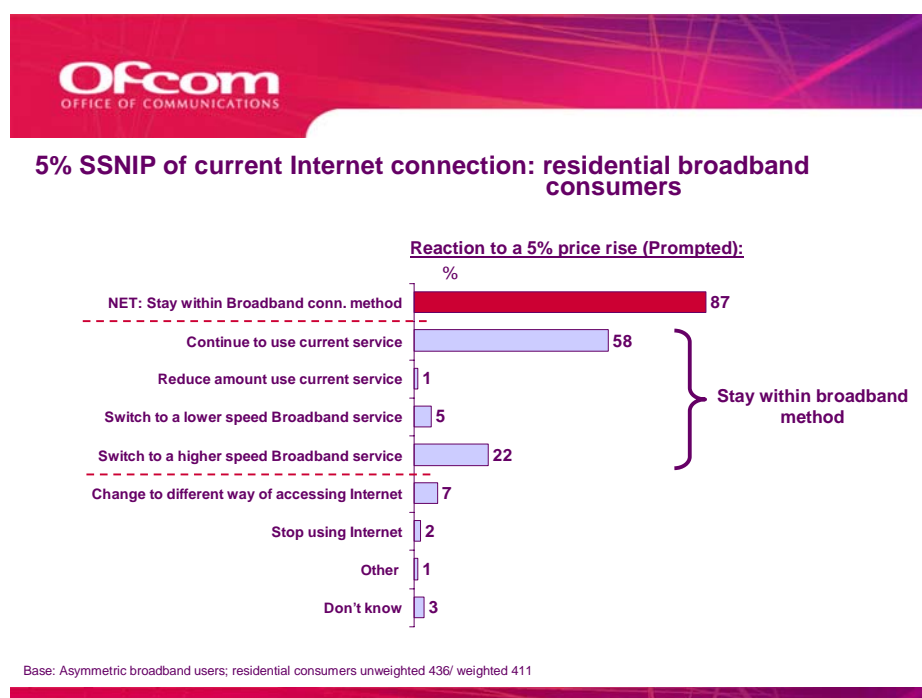
continue to use their exact same current service. Overall 87% said they would stay within their current connection method given this level of price increase. Less than one in ten (8%) believed they would change method of connection or stop using the internet altogether (see Figure 26).

Figure 26



58% of residential broadband consumers claimed they would continue to use their particular current service given a 5% increase in price and overall 87% said they would stay within their current connection method. 9% thought they would either change method of connection or stop using the internet altogether (see Figure 27).

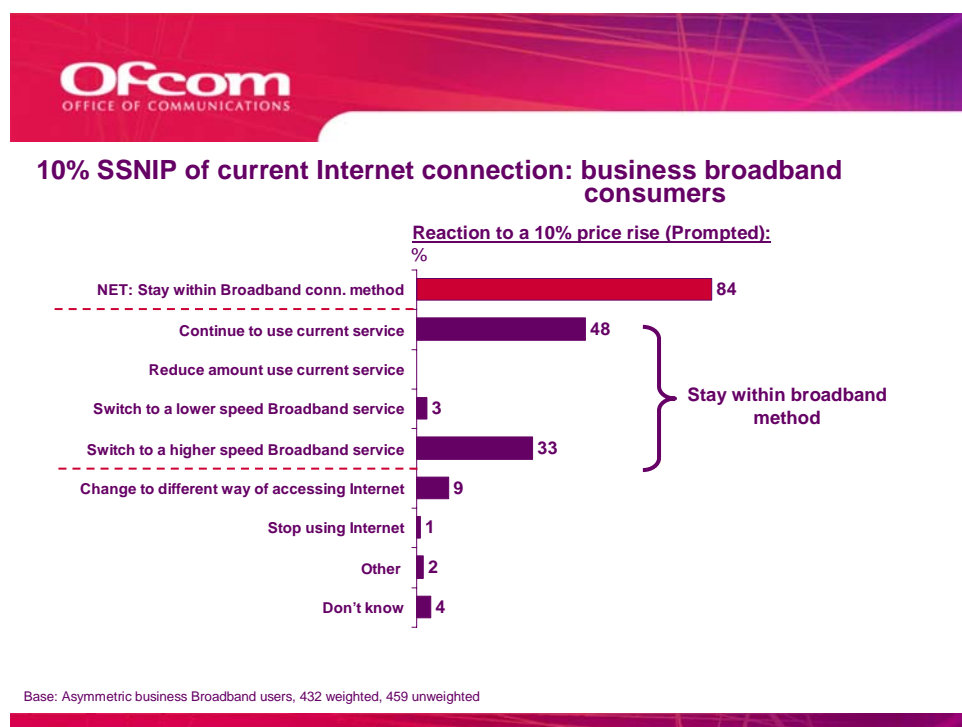
Figure 27



5.3 10% SSNIP for Broadband consumers (price increase on current speed across all companies)

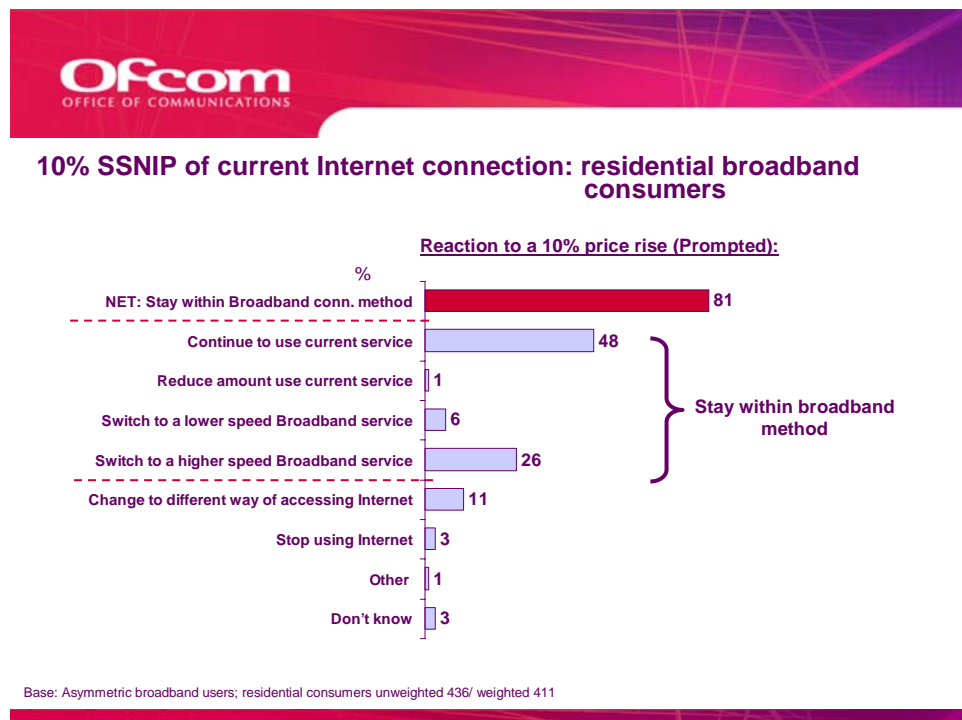
Around half (48%) of business users of asymmetric broadband claimed they would continue to use their exact same current service given a 10% SSNIP of the services with their speed of connection (see Figure 28). However 33% saw this as a potential opportunity to upgrade to a faster broadband service. Overall 84% said they thought they would stay with their current method of connecting to the internet (i.e. not switching to another connection method, but potentially choosing to use the service less or change connection speed only) with 10% saying they would change method of connection or stop using the internet altogether.

Figure 28



Eight in ten of the residential consumers (81%) using asymmetric broadband also claimed they would stay with their current method of connecting to the internet if there was a 10% increase in price of their particular current service and connection speed. 14% said they would change method of connection or stop using the internet altogether if this was to happen (see Figure 29).

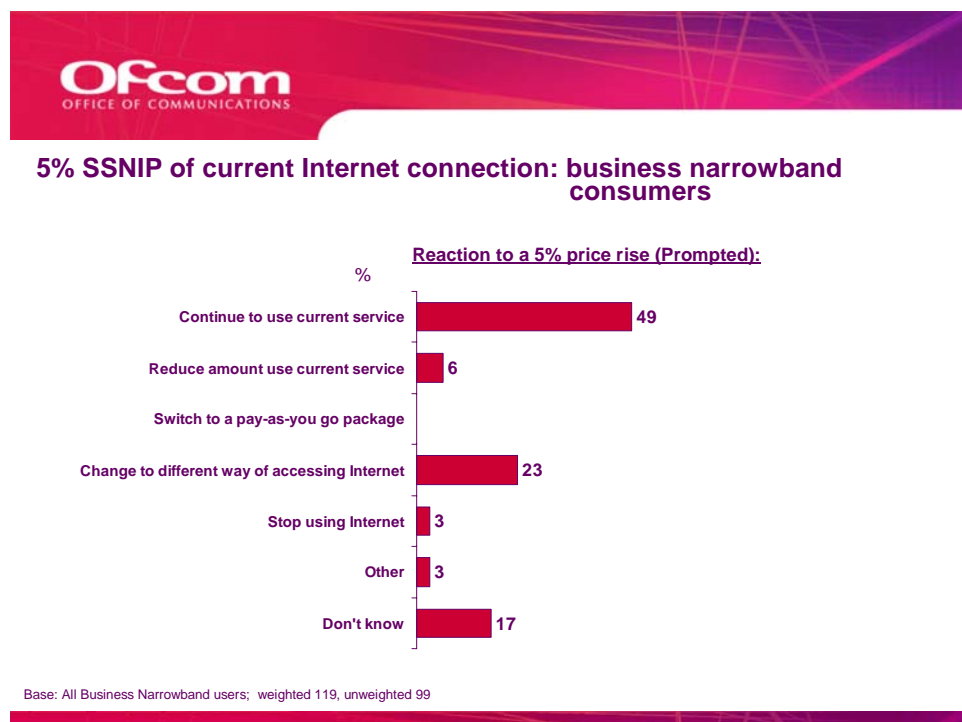
Figure 29



5.4 5% SSNIP for Narrowband consumers

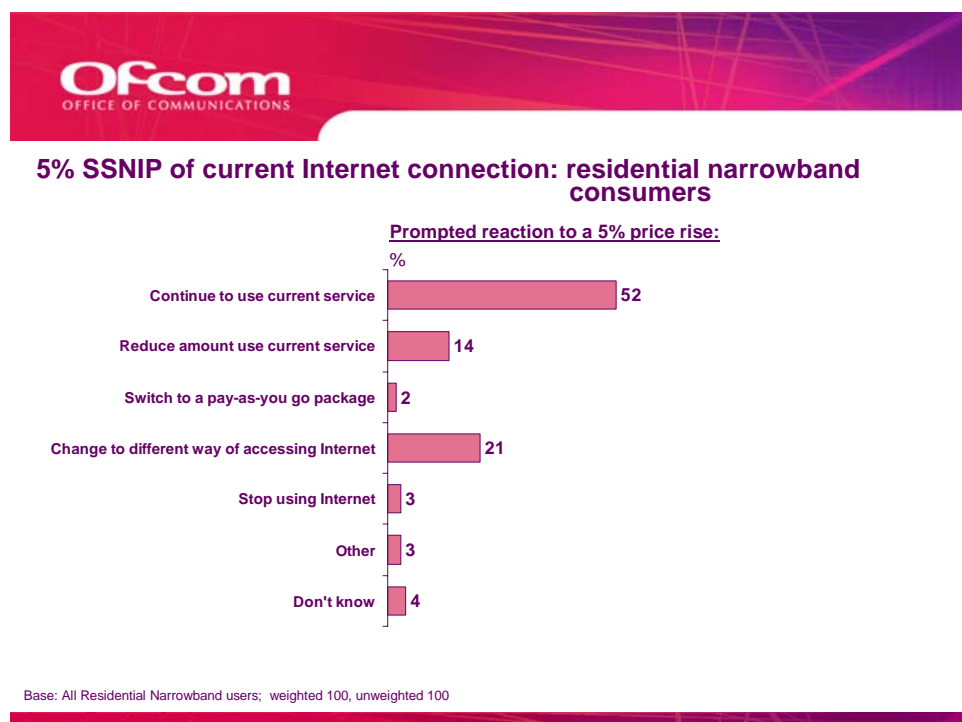
Consumers using narrowband were asked what they thought they would do if there was a 5% SSNIP. In response around half (49%) of the business consumers said they would continue to use their current service to the same extent whilst 6% said they would reduce the amount they used their service. A third said they would most likely change to a different connection method (e.g. some form of broadband) (see Figure 30).

Figure 30



Around half of residential narrowband consumers claimed would continue to use their current service as frequently given a 5% SSNIP. One in five (21%) said they would change their connection type whilst 14% believed they would reduce the amount they use their current service (see Figure 31).

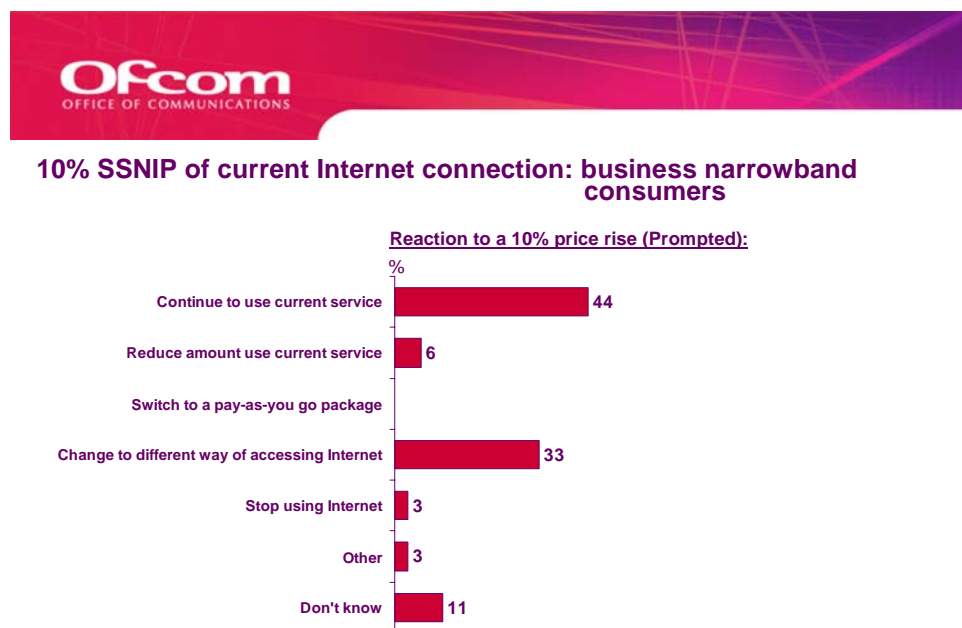
Figure 31



5.5 10% SSNIP for Narrowband consumers

When business consumers who used narrowband were asked what they thought they would do if there was a 10% increase in price of their internet services, 44% said they would continue to use the service to the same extent, whilst 33% said they would change to a different connection method (for example some form of broadband) (see Figure 32). 6% said they would reduce the amount they used their service whilst 3% said they would stop using the internet altogether.

Figure 32



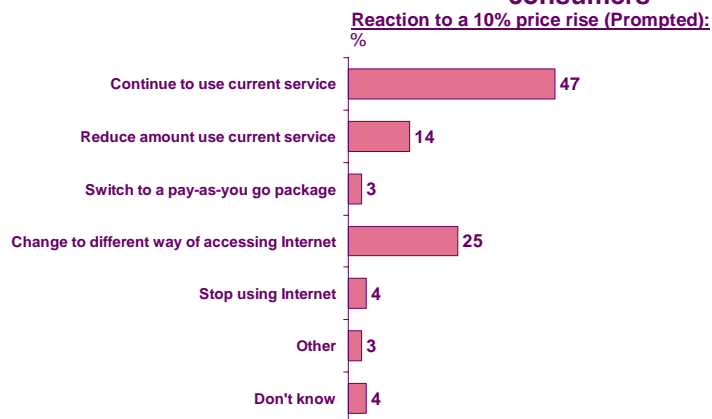
Base: All Business Narrowband users; weighted 119, unweighted 99

Just under half (47%) of residential narrowband users believed they would continue to use their current service to the same degree given a 10% SSNIP. A quarter said they would change their connection method if this level of price increase was to happen and 14% said they would reduce the amount they used their service (see Figure 33).

Figure 33



10% SSNIP of current Internet connection: residential narrowband consumers



Base: All Residential Narrowband users weighted 100, unweighted 100

5.6 10% SSNIP for Broadband consumers (price increase on respondents' connection type only)

Consumers using ADSL were asked what they thought they would do if the price of all internet services available on ADSL was increased by 10% and consumers on cable were asked the same question but focusing on a price increase on all cable internet services.

When faced with a 10% increase in price, 79% of business users of ADSL¹⁰ claimed they would continue to use their current service. Seventeen percent said they would change connection type and 1% said they would most likely stop using the internet altogether (see Figure 34).

However on probing about what type of connection method they would switch to, some business consumers actually mentioned the type of connection they were already using indicating a level of confusion/uncertainty about their possible actions. If the results are adjusted by removing these consumers who gave contradictory results, 80% of the business consumers on ADSL claimed they would continue to use their current service whilst 17% said they would either change to alternative way of accessing the internet or would stop using the internet altogether¹¹.

¹⁰Data is not reported for businesses using asymmetric broadband via cable separately as very few were identified during the research

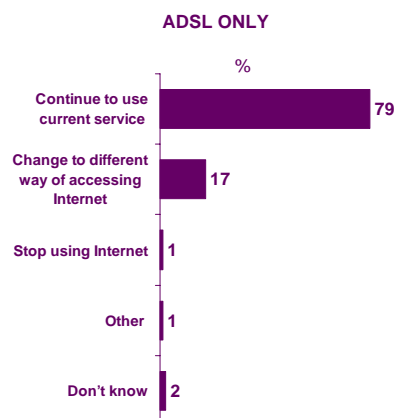
¹¹ Base: 169

Figure 34



10% SSNIP on own connection type: business consumers

Reaction to a 10% price rise (Prompted):



Base: All Business ADSL users; 164 weighted, 162 unweighted

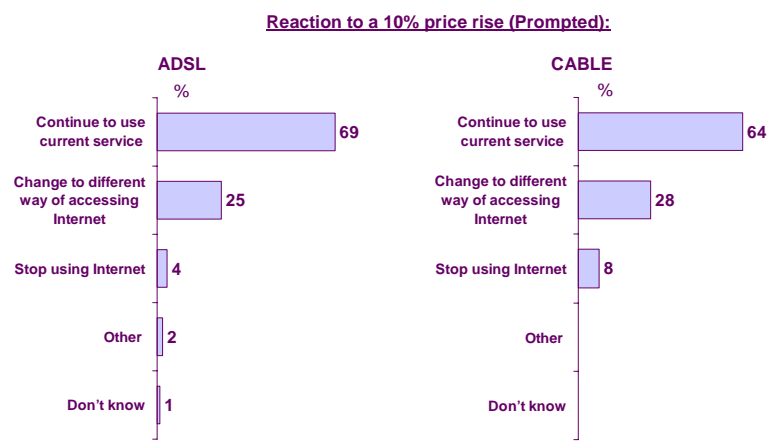
Nearly 7 in 10 of the residential users of ADSL said they would continue to use their current service if the price of all ADSL access increased by 10% and 29% said they would either change connection method or stop using the internet (see Figure 35). Just under two thirds (64%) of the residential users of cable broadband said they would continue to use their service if the price of cable access increased and 36% said they would either change connection method or stop using the internet¹².

¹² If consumers who said they would change connection type, but then mentioned they would likely switch to the method they were already using are removed from the data, 70% of residential ADSL consumers said they would continue with the service and 27% said they would either change connection method or stop using the internet (base: 86). If figures are adjusted as above, of the 33 residential consumers using cable 25 said they would continue using their cable services NB this is based on an extremely small sample

Figure 35



10% SSNIP on own connection type: residential consumers



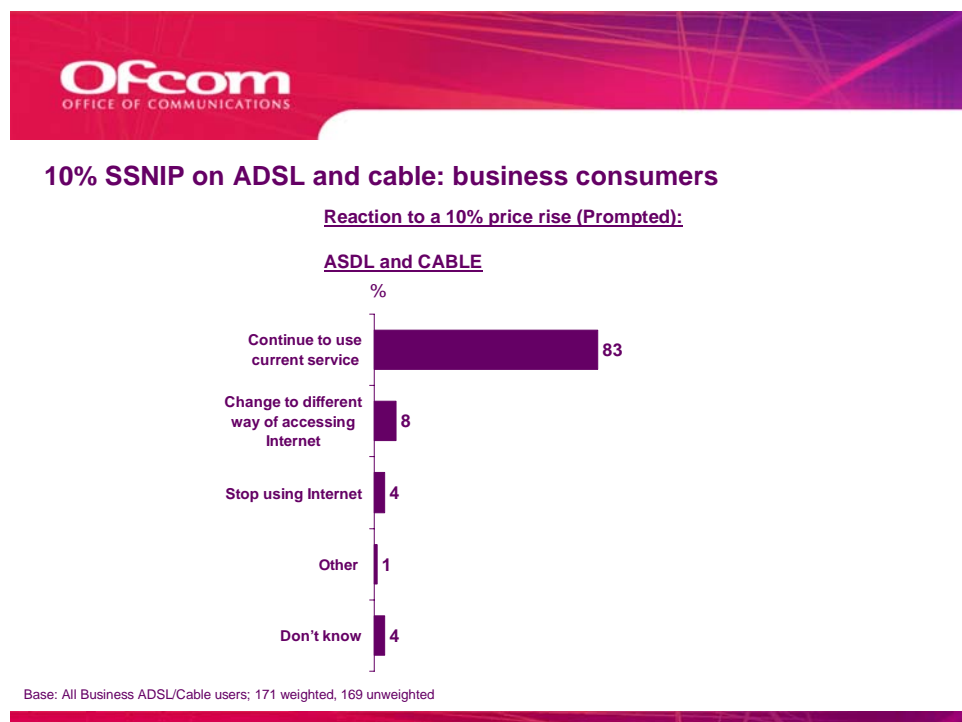
Base: All Residential ADSL users; 89 weighted, 88 unweighted, All Residential Cable users; 39 weighted, 43 unweighted * small base sizes

5.7 10% SSNIP for Broadband consumers (price increase on cable and ADSL)

When the possibility of a 10% price increase across *both* ADSL and cable internet access was suggested 83% of business users of either of these types of connections claimed they would continue to use their current service and 12% said they would either change connection method or stop using the internet¹³ (see Figure 36).

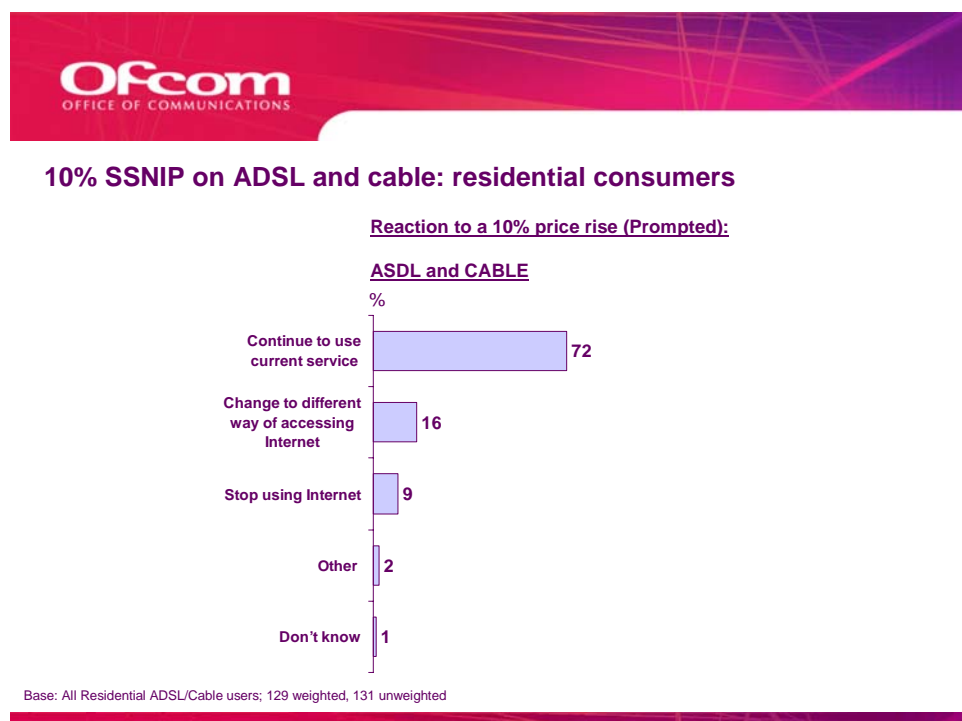
¹³ When consumers who said they would change connection type, but then mentioned the method they were already using as a likely alternative are removed from the data, 77% of business ADSL/cable consumers said they would continue with the service and 20% said they would either change connection method or stop using the internet (base:169)

Figure 36



74% of the residential users of ADSL and cable said they would continue to use their service if the price of both of these types of connection method increased by 10%. A quarter said they would either change connection method or stop using the internet (see Figure 37).¹⁴

Figure 37



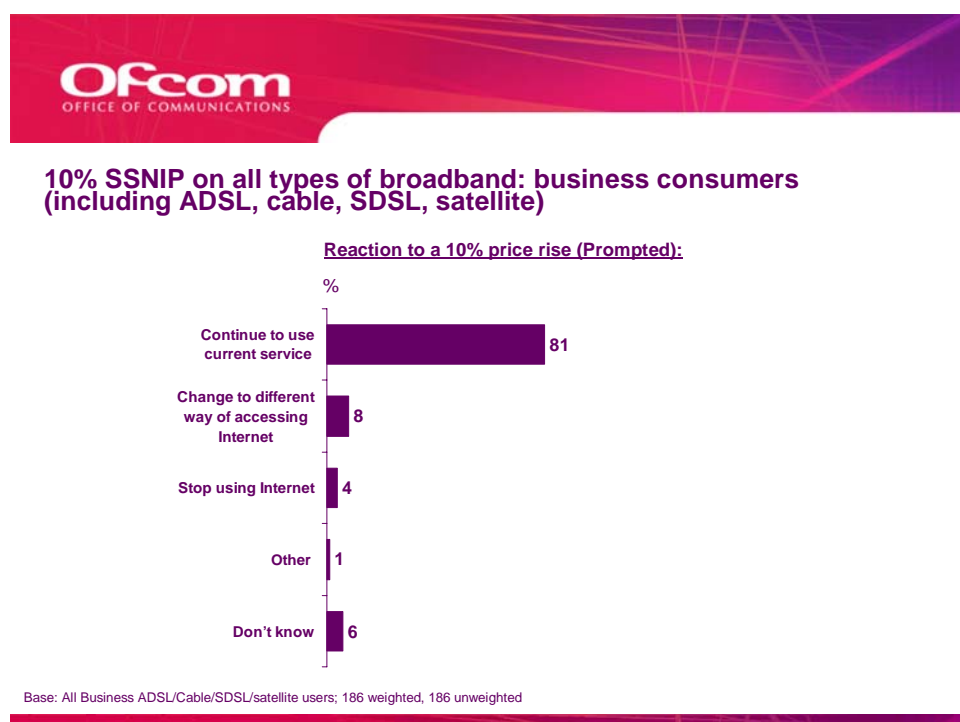
¹⁴ If consumers who said they would change connection type, but then mentioned they would likely switch to the method they were already using are removed from the data, 77% of residential ADSL/cable consumers said they would continue with the service and 20% said they would either change connection method or stop using the internet (base: 120)

5.8 10% SSNIP for Broadband consumers (price increase on all connection types)

Consumers were also asked what they might do if there was a 10% increase in price across all types of broadband connection (including ADSL, cable, SDSL and satellite access). Figures 39 and 40 show the responses given by all those interviewed – including those with SDSL and satellite connections.

When presented this scenario, 8 in 10 (81%) of the business consumers said they would continue to use their current services whilst 4% said they would stop using the internet altogether and 8% claimed they would change to a different method of connecting to the Internet than their current method.

Figure 38



74% of the residential consumers said they would continue to use their current services if there was an increase in price of 10% across all broadband connection types, 11% claimed they would stop using the internet altogether and 14% claimed they would change to a different method of connecting to the Internet than their current method (see Figure 39).

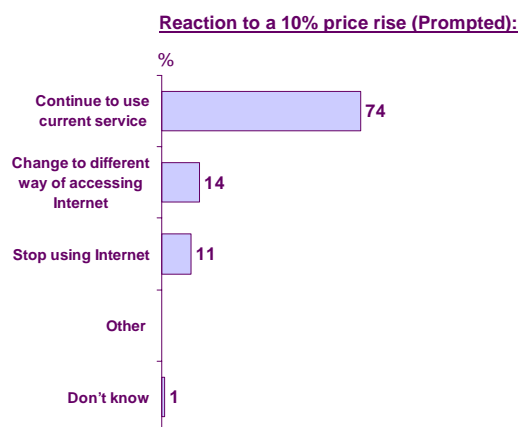
However, it is worth noting that some of the residential consumers who said they would switch to a different method of connection also mentioned that they would swap to one of the broadband technologies that the sample were already using were also facing a price rise¹⁵. If these responses are taken as 'staying with a broadband connection' the data indicates that around 8 in 10 would stay with ADSL/cable or satellite, 7% say they would switch away from these and 11% would stop using the internet altogether.

¹⁵ None of the business users claimed they would change technologies and then mentioned that they would switch to a different broadband connection method

Figure 39



10% SSNIP on all types of broadband: residential consumers (including ADSL, cable, SDSL, satellite)



Base: All Residential ADSL/Cable/satellite users; 133 weighted, 133 unweighted

5.9 Intention for narrowband consumers to switch to broadband given a 10% SSNIP on broadband

The research identified that (regardless of any price increases) 32% of business narrowband consumers said they were 'certain to', 'very likely' or 'fairly likely' to change their method of internet connection to broadband in the next 12-18 months¹⁶. These consumers were asked how likely they thought they would be to do this if there was an increase in the price of broadband of 10%. Although the data is based on a very small sample of consumers, research found that of these 38 business consumers 26 still claimed they would be at least fairly likely to switch to broadband.

Similar questions were asked to residential consumers. Around a third (34%) of these initially said they were 'certain to', 'very likely' or 'fairly likely' to change their method of internet connection to broadband in the next 12-18 months¹⁷ and of these 34 respondents, 26 still claimed they would be at least fairly likely to switch to broadband if the price of broadband were to increase by 10%.

¹⁶Base; weighted 119, unweighted 99

¹⁷Base; weighted 100, unweighted 100

Annex 1

Research questionnaires

Main study - February/March 2006

BUSINESS INTRODUCTION - AT RECEPTION

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:

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. Ofcom aims to champion the interests of businesses/consumers and 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 20 minutes depending on your responses.

Part of the study requires us to ensure that we interview a broad range 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 elseCONTINUE
Or is someone else is primarily responsibleASK TO BE REFERRED, REPEAT INTRODUCTION, THEN SKIP TO QA

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

SEE QUOTA

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

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

SEE QUOTA

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? If you have more than one way of connecting please tell me all of them. READ OUT. CODE ALL MENTIONED

NOTE FOR INTERVIEWER: IF THE RESPONDENT IS UNSURE WHETHER OR NOT THEY HAVE A WIRELESS CONNECTION (E.G. OPTION 7 VERSUS OPTION 3) THE KEY THING IS HOW THE CONNECTION IS DELIVERED TO THEIR OFFICE. IF THEY HAVE A WIRELESS CONNECTION WITHIN THEIR OFFICE BUT THEY RECEIVE THE BROADBAND TO THEIR OFFICE VIA A FIXED LINE THEY WOULD STILL BE OPTION 3 OR 4.

ASK QH IF MENTION MORE THAN ONE WAY AT QG

QH. And which of these is your main way of connecting to the internet? SINGLE CODE

- 1. Dial-up using a normal telephone line and a standard 56K modem Skip to QL
- 2. ISDN line Skip to QL
- 3. Broadband access delivered to your office via DSL (i.e. delivered to your office via phone lines - ADSL or SDSL - although you may have a wireless connection in your office) Cont to QI
- 4. Broadband access via cable modem..... Skip to QK
- 5. Leased line Skip to QJ
- 6. Broadband via satellite, or fixed wireless access; this delivers broadband to your office using radio links between an aerial located on your premises and the internet providers base station, rather than using a telephone line or a cable television network. Skip to QJ
- 7. 3G datacard in mobile devices CLOSE IF ONLY/ MAIN CONNECTION
- 8. Other..... CLOSE IF ONLY/ MAIN CONNECTION
- 9. Don't know CLOSE

ASK QI IF CODE 3 AT QH

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

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

ASK QJ IF CODE 5 or 6 AT QH

QJ. Is that asymmetric broadband or symmetric access? SINGLE CODE. READ OUT IF NECESSARY

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

BUSINESS SAMPLE:

CODE AT QH/QI	QUOTA GROUP
Code 1 or 2 at QH	Narrowband = 100 interviews
(Code 3 at QH and Code 1 or 3 at QI) or (Code 6 at QH and Code 1 or 3 at QJ) or (Code 4 at QH)	Asymmetric Broadband = 500 interviews
(Code 5 at QH) or (Code 3 at QH and Code 2 at QI) or (Code 6 at QH and Code 2 at QJ)	Symmetric Broadband = 100 interviews

IF CODE ADSL/CABLE WIRELESS OR SDSL (codes 3, 4 or 6 at QH) ASK QK

QK. Is your main internet connection used to support a number of PCs on a network or a single PC?

- Network
- Single
- Don't know

QL. Including your current office - how many sites or offices does your company operate from in the UK? SINGLE CODE

- 1
- 2
- 3
- 4 or more
- Don't know

QM. In which of the following areas of the UK is your business based? (IF 2+ SITES AT QI SAY: 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

SEE QUOTA

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

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

QO. As far as you are aware, does your area have cable coverage? SINGLE CODE

- Yes
- No
- Don't know

SEE QUOTA –
calculate from
sample based on
postcode areas

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 elseCONTINUE
- Or is someone else is primarily responsibleASK TO BE REFERRED, REPEAT INTRODUCTION, THEN SKIP TO QA

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. 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



QD. 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

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
- Company pays bill CLOSE
- Don't know CLOSE

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 line that usually has to be installed by an engineer. 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 and still be Broadband – the important thing is how the connection is delivered to their home.

SATELLITE OR FIXED WIRELESS: this allows high-speed data connections using radio links between an aerial located on the user's premises and an operator's 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 line (although you may have a wireless connection in your home)
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

ASK QG IF BROADBAND (CODE 3 ONLY) AT QF

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 or Telewest using a cable modem
3. Don't know (Don't read out)

IF DK, THE NAME OF THE PROVIDER MAY BE USED TO LINK BACK TO ADSL USAGE.

ASK QH IF CODE 3 or 4 AT QF

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)
2. No - have similar upload and download speeds (Symmetric)
3. Don't know (NB ASSUME ASYMMETRIC ACCESS FOR LATER Q'RE ROUTING)

ASK QI OF ALL RESIDENTIAL USING ASYMM/SMM BROADBAND AS MAIN METHOD (CODE 3 OR 4 AT QF). OTHERS SKIP TO QJ

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

- Up to 512 kbit (1/2 Mb)1
- Up to 1Mb2
- Up to 2Mb3
- Up to 4Mb4
- Up to 8Mb5
- Other (WRITE IN)6
- Don't know7

RESIDENTIAL SAMPLE:

CODE AT QF	QUOTA GROUP
Code 1, 2	Narrowband = 100 interviews

Code 3 or 4 at QF	Asymmetric Broadband (ADSL/Cable) = 400 interviews
Codes 4 or 5 at QI	Boosts of high-speed (4MB+) = 100 <i>(to be identified via panel sample not part of main research sample)</i>

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

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, does your area have cable coverage, in other words do you currently have cable television or would it be possible for you to get it if you wanted it? SINGLE CODE

- Yes
- No
- Don't know

SEE QUOTA –
calculate from
sample based on
postcode areas

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. IF CODE 3 AT QG/QH INSERT CONNECTION TYPE FROM Q1 "ADSL BROADBAND CONNECTION" OR "SDSL BROADBAND CONNECTION"
FOR RESIDENTIAL = CONNECTION AT QF. IF CODE 3 AT QF SIMPLY SAY "BROADBAND"

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

DO NOT READ OUT. SINGLE CODE

- AOL
- Advance internet
- BT
- Bulldog
- Claranet
- Colt Telecommunications
- Datanet International (DataDSL)
- Demon internet
- Easynet
- Freeserve
- Mailbox internet
- Mistral
- Netscalibur
- NTLCLOSE IF ALSO DO NOT KNOW WHETHER CABLE OR DSL CONNECTION AT RESIDENTIAL QG
- Onyx internet
- Pipex internet
- Plusnet
- Telewest/BlueyonderCLOSE IF ALSO DO NOT KNOW WHETHER CABLE OR DSL CONNECTION AT RESIDENTIAL QG
- Tiscali
- Wanadoo
- Zen internet
- Other (WRITE IN)
- Don't knowCLOSE IF ALSO DO NOT KNOW WHETHER ADSL/SDSL CONNECTION AT BUSINESS QI, OR IF ALSO DO NOT KNOW WHETHER CABLE OR DSL CONNECTION AT RESIDENTIAL QG

Q2/Q3 ASK BUSINESS CUSTOMERS ONLY. ASK Q2 OF ALL BUSINESS CUSTOMERS USING ASYMM/SMM BROADBAND AS MAIN METHOD = QH, code 3 or 4 or 6. OTHERS SKIP TO Q3 (RESIDENTIAL ASKED AS PART OF SCREENER)

Q.2 What is the 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
- Other (WRITE IN)
- Don't know

ASK BUSINESS CUSTOMERS WITH LEASED LINES AT QH (CODE 5)

Q3. What is the bandwidth of your leased lines...READ OUT? SINGLE CODE

- Bandwidth of up to 8Mbits
- Bandwidth of over 8 Mbits
- Don't Know (Don't read out)

ASK Q4 OF ALL USING BROADBAND AS MAIN METHOD BUSINESS – CODE 3,4 OR 6 AT QH/ RESIDENTIAL – CODE 3 OR 4 AT QF.. OTHERS SKIP TO Q5

Q4. Is your main broadband connection package..... READ OUT? SINGLE CODE

- An un-metered package, i.e. unlimited downloads
- A metered package, i.e. you have limits set on the amount of downloads and have to pay more if you go over this
- Don't know (Don't read out)

ASK Q5 OF ALL USING ORDINARY DIAL-UP ACCESS, OR ISDN LINES AS MAIN METHOD (BUSINESS – CODE 1 OR 2 AT QH/ RESIDENTIAL – CODE 1OR 2 AT QF). OTHERS SKIP TO Q6

Q5. 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

Q6 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 AT Q6a MONTHLY

ASK ALL THOSE EXCEPT THOSE USING LEASED LINES – (BUSINESS CODE 5 AT QH)

NOTE TO INTERVIEWERS:

THIS QUESTION 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 connection, including VAT? Please do not include any other phone charges or bills, 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

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

- 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
- Don't know

ASK FOR BUSINESS ONLY (FOR CONSUMERS ASSUME = INCLUDING VAT) EXCEPT IF DON'T KNOW AT Q6B PROMPTED LIST

Q6AA. Can I confirm whether the amount you have just given was including or excluding VAT? SINGLE CODE

- 1 INCLUDING VAT
- 2 EXCLUDING VAT

ASK THOSE USING LEASED LINES (BUSINESS SAMPLE – CODE 5 AT Q6). OTHERS SKIP TO Q9

Q6b. How much <<does your company/do you>> pay each (INSERT FROM Q6) for your leased lines including VAT but excluding any service you may pay extra for such as voice or security services?

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

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

- 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
- Don't know

ASK THOSE USING LEASED LINES (BUSINESS SAMPLE – CODE 5 AT Q6) EXCEPT IF DON'T KNOW AT Q6B PROMPTED LIST

Q6BB. Can I confirm whether the amount you have just given was including or excluding VAT? SINGLE CODE

1. INCLUDING VAT
2. EXCLUDING VAT

ASK THOSE USING LEASED LINES (BUSINESS SAMPLE – CODE 5 AT Q6).

Q7. Do you use your leased lines for anything other than internet access? SINGLE CODE

- Yes
- No
- Don't know

ASK THOSE WHO USE LEASED LINES FOR OTHER THAN INTERNET- I.E. CODE YES AT Q7

Q8. Can you *estimate what proportion* of your leased line *capacity* is used for your internet connection? WRITE IN NUMERIC ANSWER USING LEADING ZEROS (MUST BE BETWEEN 1-99):

IF DON'T KNOW PROMPT: Would you say this is about.... READ OUT SINGLE CODE

- A quarter or less
- More than a quarter – up to half
- More than half
- Don't know (Don't read out)

ASK ALL

Q9. On a scale of 1-10 where 1 is not at all important and 10 is extremely important, how important are each of the following to you in an internet connection <<for your business/for your home>>?

So, starting with (READ OUT FIRST ATTRIBUTE)

READ OUT EACH ATTRIBUTE. ROTATE ORDER. SINGLE CODE FOR EACH ALLOW DON'T KNOW

The low cost of the service
The reliability of the service
Having an "always on" connection
The speed of the connection
The contention ratio (IF NEEDED: This is the level at which the line is shared with other users)
The ability to make telephone calls at the same time as being online

Having wireless access and therefore being able to use the internet in public places or within range of a satellite or radio transmitter
The Service Level Agreements (BUSINESS ONLY)
That you have similar uploading speeds as downloading (IF NEEDED: uploading basically means sending information, whereas downloading means receiving information)

Q10. At present, how important is it to you to be able to do the following using your internet connection where 1 is not at all important and 10 is extremely important? So, starting with (READ OUT FIRST ATTRIBUTE)

READ OUT EACH ATTRIBUTE. ROTATE ORDER. SINGLE CODE FOR EACH ALLOW DON'T KNOW

Download or stream DVDs and music (RESIDENTIAL ONLY)
Watch TV over the internet as it is broadcast (RESIDENTIAL ONLY)
Make VOIP calls, i.e. make calls over the internet
Connect more than one PC simultaneously
Use video conferencing (
The amount of Gbites or data you can download per month
Website related services, for example the amount of webspace available, hosting, support etc.
Security related services, i.e. firewall, antivirus, antispam etc.
E-mail related services, i.e. amount of free mailboxes, freedom to choose your own mail addresses, i.e. domain names
Accessing systems, files or data whilst (INSERT AS APPROPRIATE FOR BUSINESS/RESIDENTIAL) < out of the office/away from home>
Taking orders from customers via the company website (BUSINESS ONLY)

Q11. And how important do you think it might be for you to do these things *in the future*, very important, fairly important not at all important? So, starting with (READ OUT FIRST ATTRIBUTE)

READ OUT EACH ATTRIBUTE. ROTATE ORDER. SINGLE CODE FOR EACH ALLOW DON'T KNOW

Download or stream DVDs and music (RESIDENTIAL ONLY)
Watch TV over the internet as it is broadcast (RESIDENTIAL ONLY)
Make VOIP calls, i.e. make calls over the internet
Connect more than one PC simultaneously
Use video conferencing (
The amount of Gbites or data you can download per month
Website related services, for example the amount of webspace available, hosting, support etc.
Security related services, i.e. firewall, antivirus, antispam etc.
E-mail related services, i.e. amount of free mailboxes, freedom to choose your own mail addresses, i.e. domain names
Accessing systems, files or data whilst (INSERT AS APPROPRIATE FOR BUSINESS/RESIDENTIAL) < out of the office/away from home>
Taking orders from customers via the company website (BUSINESS ONLY)

IF MENTION VERY OR FAIRLY IMPORTANT AT ANY OF THESE ELEMENTS AT Q11

Q12. Do you think you will need to change your connection method in order to accommodate using these services? SINGLE CODE

- Yes
- No
- Don't know

SSNIP

HALF OF THE BUSINESS AND HALF OF THE RESIDENTIAL RESPONDENTS TO BE ASKED ABOUT A 5% CHANGE FIRST AND THE OTHER HALF TO BE ASKED ABOUT A 10% CHANGE FIRST. NB WE NEED TO RECORD IF THEY WERE ASKED ABOUT 10% OR 5% FIRST.

READ OUT: We are now going to talk about the different methods of internet connection, that is dial-up, ISDN, broadband, leased lines and so forth, rather than the individual company that provides this. We need to understand how you might react if there were price rises for internet connections of your type.

Q13- Q23= ASDL/Cable modem Broadband/WIRELESS BROADBAND – ONLY ASK IF BUSINESS: (Code 3 at QH and Code 1 or 3 at QI) or (Code 6 at QH and Code 1 or 3 at QJ) or (Code 4 at QH)
RESIDENTIAL: Code 3 or 4 at QF

Q13. If the price of your internet subscription for the type of service you currently receive were to rise by X% per month, i.e. £<<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>> per month, not including any services you may pay extra for such as making calls, security etc, I'd like to know which of the following courses of action you would consider. Please assume that the price increase for the service you are on is for *all* companies that provide this type of internet service, and just for your current speed. You can mention as many of the following options as you like.

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

Would you consider....? READ OUT ALL OPTIONS BEFORE ALLOWING RESPONDENT TO CODE AN ANSWER.
ROTATE ORDER. CODE ALL MENTIONED

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

- Continuing to use current broadband connection at the increased price
- Keeping your current service, but reduce the amount that you use this (IF METERED ACCESS AT Q4)
- Switching to a *lower speed* broadband service, assuming these prices have not changed (DO NOT SHOW IF ON THE LOWEST SPEED ALREADY i.e. a 512 CONNECTION SPEED AT Q2 FOR BUSINESS OR QI FOR RESIDENTIAL)
- Switching to a *higher speed* broadband service, assuming these prices have not changed (DO NOT SHOW IF ON THE HIGHEST SPEED ALREADY i.e. an 8MB CONNECTION SPEED AT Q2 FOR BUSINESS OR QI FOR RESIDENTIAL)
- Changing to use a *different way* of accessing the internet, including a different type of broadband connection
- Stopping using the internet altogether
- Other (write in.....)
- Don't know (Don't read out)

IF MORE THAN ONE MENTIONED AT Q13

Q14. And which of these would you be most likely to do? READ OUT IF NECESSARY. USE SAME ROTATE ORDER AS PREVIOUS. SINGLE CODE.

- Continue to use current broadband connection at the increased price
- Keep your current service, but reduce the amount that you use this (IF METERED ACCESS AT Q4)
- Switch to a *lower speed* broadband service, assuming these prices have not changed (DO NOT SHOW IF ON THE LOWEST SPEED ALREADY I.E. 512K BITS AT Q2 FOR BUSINESS OR QI FOR RESIDENTIAL)
- Switch to a *higher speed* broadband service, assuming these prices have not changed (DO NOT SHOW IF ON THE HIGHEST SPEED ALREADY I.E. 8MB AT Q2 FOR BUSINESS OR QI FOR RESIDENTIAL)
- Change to use a different way of accessing the internet, including a different type of broadband connection
- Stop using the internet altogether
- Other (INSERT FROM Q13)
- Don't know

DO NOT ASK Q15 IF DON'T KNOW AT Q13 OR Q14

Q15. 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)

IF MENTION THEY WOULD USE DIFFERENT WAY OF ACCESSING AT Q14 OR Q13 IF ONLY ONE ANSWER AT Q13

Q16A What type of connection do you think you would be most likely to use to access the internet? DO NOT READ OUT.

SINGLE CODE

Switch to a normal telephone line dial up connection
Switch to an ISDN line
Switch to a leased line
Switch to SDSL
Switch to a satellite or fixed wireless broadband connection
Switch to broadband via ADSL
Switch to broadband via Cable
Switch to a different type of broadband connection (unspecified) GO TO Q16B
Other (WRITE IN)
Don't know – GO TO Q17

IF CODE – SWITCH TO A DIFFERENT BROADBAND SERVICE (UNSPECIFIED) AT Q16a (TO BE BACK CODED INTO Q16a FOR TABLES/DATA ANALYSIS)

Q16b. 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. SINGLE CODE

NOTE TO SCRIPT WRITER – DO NOT ALLOW CURRENT CONNECTION TYPE

Switch to broadband via ADSL
Switch to broadband via Cable
Switch to SDSL
Switch to a satellite or fixed wireless broadband connection
Don't know (READ OUT)

IF DON'T KNOW AT Q16A.

Q17. Which, if any, of the following would you be most likely to do? READ OUT ALL OPTIONS BEFORE ALLOWING THE RESPONDENT TO CODE AN ANSWER. SINGLE CODE

Switch to a normal telephone line dial up connection
Switch to an ISDN line
Switch to a leased line, which would provide a dedicated service, fast speed, similar upload and download speeds
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 (ONLY SHOW IF USING CABLE/ADSL I.E. CODE 3 OR 4 AT QH FOR BUSINESS AND CODE 3 AT QH FOR RESIDENTIAL)
Switch to broadband via ADSL (ONLY SHOW IF USING CABLE/WIRELESS I.E. CODES 4 OR 6 AT QH, or CODE 2 AT QI, FOR BUSINESS OR FOR RESIDENTIAL - CODE 2 AT QG OR CODE 4 AT QF)
Switch to broadband via Cable (ONLY SHOW IF USING DSL/WIRELESS I.E. CODES 3 OR 6 AT Q H FOR BUSINESS OR FOR RESIDENTIAL - CODE 1 AT QG OR CODE 4 AT QF)
Other (WRITE IN)
Don't know (READ OUT)

ASK FOLLOWING QUESTIONS ABOUT 5% IF THOSE WHO WERE ASKED ABOUT 10% DID NOT SAY 'Continue to use current broadband connection at the increased price' AT Q13/Q14
 ASK FOLLOWING QUESTIONS ABOUT 10% IF THOSE WHO WERE ASKED ABOUT 5% SAID THEY WOULD 'Continue to use current broadband connection at the increased price' OR 'Don't know' AT Q13/Q14

Q18. If I were to inform you that the price increase for your type of internet access was to increase by X% instead, i.e. £<<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>> per month, would this have changed your answer to the previous questions?

- Yes – ASK Q19
- No - ASSUME SAME ANSWERS TO PREVIOUS QUESTIONS
- Don't know – ASSUME DON'T KNOW AT SUBSEQUENT QUESTIONS

IF YES IS CODED AT Q18

Q19. So given the price rise of X% (INSERT AS FOR Q18), which of these would you consider..... You can mention as many of the following options as you like.

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

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

- Continuing to use current broadband connection at the increased price
- Keeping your current service, but reduce the amount that you use this (IF METERED ACCESS AT Q4)
- Switching to a *lower speed* broadband service, assuming these prices have not changed (DO NOT SHOW IF ON THE LOWEST SPEED i.e. a 512 CONNECTION SPEED AT Q2 FOR BUSINESS OR Q1 FOR RESIDENTIAL ALREADY)
- Switching to a *higher speed* broadband service, assuming these prices have not changed (DO NOT SHOW IF ON THE HIGHEST SPEED i.e. an 8Mb CONNECTION SPEED AT Q2 FOR BUSINESS OR Q1 FOR RESIDENTIAL ALREADY)
- Changing to use a *different way* of accessing the internet, including a different type of broadband connection
- Stopping using the internet altogether
- Other (write in.....)
- Don't know (Don't read out)

IF MORE THAN ONE MENTIONED AT Q19

Q20 And which of these would you be most likely to do? READ OUT IF NECESSARY. USE SAME ROTATE ORDER AS PREVIOUS. SINGLE CODE.

- Continue to use current broadband connection at the increased price
- Keep your current service, but reduce the amount that you use this (IF METERED ACCESS AT Q4)
- Switch to a *lower speed* broadband service, assuming these prices have not changed (DO NOT ALLOW, IF ON THE LOWEST SPEED i.e. a 512 CONNECTION SPEED AT Q2 FOR BUSINESS OR Q1 FOR RESIDENTIAL ALREADY)
- Switch to a *higher speed* broadband service, assuming these prices have not changed (DO NOT ALLOW, IF ON THE HIGHEST SPEED i.e. an 8Mb CONNECTION SPEED AT Q2 FOR BUSINESS OR Q1 FOR RESIDENTIAL ALREADY)
- Change to use a different way of accessing the internet, including a different type of broadband connection
- Stop using the internet altogether
- Other (INSERT FROM Q19)
- Don't know

DO NOT ASK Q21 IF DON'T KNOW AT Q19 OR Q20

Q21. 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)

IF MENTION THEY WOULD USE DIFFERENT WAY OF ACCESSING INTERNET AT Q20 OR Q19 IF ONLY ONE ANSWER AT Q19

Q22A. What type of connection do you think you would be most likely to use to access the internet? DO NOT READ OUT.
SINGLE CODE

- Switch to a normal telephone line dial up connection
- Switch to an ISDN line
- Switch to a leased line
- Switch to SDSL
- Switch to a satellite or fixed wireless broadband connection
- Switch to broadband via ADSL
- Switch to broadband via Cable
- Switch to a different type of broadband connection (unspecified) - GO TO Q22B
- Other (WRITE IN)
- Don't know – GO TO Q23

IF CODE – SWITCH TO A DIFFERENT BROADBAND SERVICE (UNSPECIFIED) AT Q22A (TO BE BACK CODED INTO Q22A FOR TABLES/DATA ANALYSIS)

Q22b. 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. SINGLE CODE

NOTE TO SCRIPT WRITER – DO NOT ALLOW CURRENT CONNECTION TYPE

- Switch to broadband via ADSL
- Switch to broadband via Cable
- Switch to SDSL
- Switch to a satellite or fixed wireless broadband connection
- Don't know (READ OUT)

IF DON'T KNOW AT Q22A

Q23. Which, if any, of the following would you be most likely to do? READ OUT ALL OPTIONS BEFORE ALLOWING THE RESPONDENT TO CODE AN ANSWER. SINGLE CODE

- Switch to a normal telephone line dial up connection
- Switch to an ISDN line
- Switch to a leased line, which would provide a dedicated service, fast speed, similar upload and download speeds
- 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 (ONLY SHOW IF USING CABLE/ADSL I.E. CODE 3 OR 4 AT QH FOR BUSINESS AND CODE 3 AT QH FOR RESIDENTIAL)
- Switch to broadband via ADSL (ONLY SHOW IF USING CABLE/WIRELESS I.E. CODES 4 OR 6 AT QH, or CODE 2 AT QI, FOR BUSINESS OR FOR RESIDENTIAL - CODE 2 AT QG OR CODE 4 AT QF)
- Switch to broadband via Cable (ONLY SHOW IF USING ADSL/WIRELESS I.E. CODES 3 OR 6 AT Q H FOR BUSINESS OR FOR RESIDENTIAL - CODE 1 AT QG OR CODE 4 AT QF)
- Other (WRITE IN)
- Don't know (READ OUT)

Q24- = Narrowband/ISDN Users Only (I.E. CODE 1 OR 2 AT QH FOR BUSINESS OR CODE 1 OR 2 AT QF FOR RESIDENTIAL)

HALF TO BE ASKED ABOUT A 5% CHANGE FIRST AND THE OTHER HALF TO BE ASKED ABOUT A 10% CHANGE FIRST NB WE NEED TO RECORD IF THEY WERE ASKED ABOUT 10% OR 5% FIRST.

Q24. If the price of your current <<dial up/ISDN>> internet package were to rise by X%, i.e. £<<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>> per month, I'd like to know which of the following courses of action you would consider. You can mention as many as you like. Please assume that the price increase for the service you are on is for *all* companies that provide this.

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

Would you consider.....READ OUT ALL OPTIONS BEFORE ALLOWING THE RESPONDENT TO CODE AN ANSWER. ROTATE ORDER. CODE ALL MENTIONED

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

- Continuing to use current package at the increased price
- Keeping your current service but reduce the amount that you use the internet (IF CODE 1 or 3 AT Q5)
- Staying using dial-up but switch to a pay-as-you go package and reduce the amount that you use the internet (IF CODE 2 AT Q5)
- Switching to another way of accessing the internet (DO NOT READ OUT: Include switching to broadband)
- Stopping using the internet altogether
- Other (write in)
- Don't know (Don't read out)

IF MORE THAN ONE MENTIONED ASK Q25

Q25. And which of these would you be most likely to do? READ OUT IF NECESSARY. USE SAME ROTATE ORDER AS PREVIOUS. SINGLE CODE.

- Continue to use current package at the increased price
- Keep your current service but reduce the amount that you use the internet (IF CODE 1 OR 3 AT Q5)
- Stay using dial-up but switch to a pay-as-you go package and reduce the amount that you use the internet (IF CODE 2 AT Q5)
- Switch to another way of accessing the internet (DO NOT READ OUT: Include switching to broadband)
- Stop using the internet altogether
- Other (INSERT FROM Q24)
- Don't know

DO NOT ASK Q26 IF DON'T KNOW AT Q24 OR Q25

Q26. 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)

IF MENTION SWITCHING TO ANOTHER WAY OF ACCESSING THE INTERNET AT Q25 OR AT Q24 IF ONLY ONE ANSWER GIVEN AT Q24

Q27A What type of connection do you think you would be most likely to use to access the internet? DO NOT READ OUT. SINGLE CODE

- Switch to a normal telephone line dial up connection
- Switch to an ISDN line
- Switch to a broadband connection via ADSL (i.e. via a normal phone line)
- Switch to a broadband connection via Cable
- Switch to a broadband connection (unspecified).....ASK Q27B

Switch to a leased line
Switch to SDSL
Switch to a satellite or fixed wireless broadband connection
Other (WRITE IN)
Don't know – IF DON'T KNOW ASK Q28

ASK Q27 IF CODE SWITCH TO A BROADBAND CONNECTION (UNSPECIFIED AT Q27)

Q27b. 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. SINGLE CODE

NOTE TO SCRIPT WRITER – DO NOT ALLOW CURRENT CONNECTION TYPE

Switch to broadband via ADSL
Switch to broadband via Cable
Switch to SDSL
Switch to a satellite or fixed wireless broadband connection
Don't know (READ OUT)

IF DON'T KNOW AT Q27A

Q28. Which, 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 a normal telephone line dial up connection (ONLY SHOW IF USING ISDN, I.E. CODE 2 AT QH FOR BUSINESS OR CODE 2 AT QF FOR RESIDENTIAL)
Switch to an ISDN line (ONLY SHOW IF USING DIAL-UP/NARROWBAND – I.E. CODE 1 AT QH FOR BUSINESS OR CODE 1 AT QF FOR RESIDENTIAL)
Switch to a broadband connection via ADSL (IF UNSURE SAY: i.e. via a normal phone line)
Switch to a broadband connection via Cable
Switch to a leased line, which would provide a dedicated service, fast speed, similar upload and download speeds
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
Other (WRITE IN)
Don't know (Read out)

ASK FOLLOWING QUESTIONS ABOUT 5% IF THOSE WHO WERE ASKED ABOUT 10% DID NOT SAY 'Continue to use current package at the increased price' AT Q24/Q25
ASK FOLLOWING QUESTIONS ABOUT 10% IF THOSE WHO WERE ASKED ABOUT 5% SAID THEY WOULD 'Continue to use current package at the increased price' or 'Don't know' AT Q24/Q25

Q29. If I were to inform you that the price increase for your type of internet access was to increase by X% instead, i.e. £<<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>> per month, would this have changed your answer to the previous questions?

Yes – ASK Q30
No - ASSUME SAME ANSWERS TO PREVIOUS QUESTIONS
Don't know – ASSUME DON'T KNOW AT SUBSEQUENT QUESTIONS

IF YES IS CODED AT Q29

Q30. So given the price rise of X%, which of these would you consider..... You can mention as many as you like.

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

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 package at the increased price
Keep your current service but reduce the amount that you use the internet (IF CODE 1 OR 3 AT Q5)
Stay using dial-up but switch to a pay-as-you go package and reduce the amount that you use the internet (IF CODE 2 AT Q5)
Switch to another way of accessing the internet (DO NOT READ OUT: Include switching to broadband)
Stop using the internet altogether
Other (WRITE IN)

Don't know

IF MORE THAN ONE MENTIONED AT Q30

Q31. And which of these would you be most likely to do? READ OUT IF NECESSARY. USE SAME ROTATE ORDER AS PREVIOUS. SINGLE CODE.

- Continue to use current package at the increased price
- Keep your current service but reduce the amount that you use the internet (IF CODE 1 OR 3 AT Q5)
- Stay using dial-up but switch to a pay-as-you go package and reduce the amount that you use the internet (IF CODE 2 AT Q5)
- Switch to another way of accessing the internet (DO NOT READ OUT: Include switching to broadband)
- Stop using the internet altogether
- Other (INSERT FROM 30)
- Don't know

DO NOT ASK Q32 IF DON'T KNOW AT Q30 OR Q31

Q32. 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)

IF MENTION SWITCHING TO ANOTHER WAY OF ACCESSING THE INTERNET AT Q30 OR Q31

Q33A What type of connection do you think you would be most likely to use to access the internet? DO NOT READ OUT. SINGLE CODE.

- Switch to a normal telephone line dial up connection
- Switch to an ISDN line
- Switch to a broadband connection via ADSL (i.e. via a normal phone line)
- Switch to a broadband connection via Cable
- Switch to a broadband connection (unspecified).....ASK Q33B
- Switch to a leased line
- Switch to SDSL
- Switch to a satellite or fixed wireless broadband connection
- Other (WRITE IN)
- Don't know – IF DON'T KNOW ASK Q34

IF CODE SWITCH TO A BROADBAND CONNECTION (UNSPECIFIED AT Q33A)

Q33b. 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. SINGLE CODE

NOTE TO SCRIPT WRITER – DO NOT ALLOW CURRENT CONNECTION TYPE

- Switch to broadband via ADSL
- Switch to broadband via Cable
- Switch to SDSL
- Switch to a satellite or fixed wireless broadband connection
- Don't know (READ OUT)

IF DON'T KNOW AT Q33A

Q34 Which, 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 a normal telephone line dial up connection (ONLY SHOW IF USING ISDN, I.E. CODE 2 AT QH FOR BUSINESS OR CODE 2 AT QF FOR RESIDENTIAL)
 Switch to an ISDN line (ONLY SHOW IF USING DIAL-UP/NARROWBAND – I.E. CODE 1 AT QH FOR BUSINESS OR CODE 1 AT QF FOR RESIDENTIAL)
 Switch to a broadband connection via ADSL (IF UNSURE: i.e. via a normal phone line)
 Switch to a broadband connection via Cable
 Switch to a leased line, which would provide a dedicated service, fast speed, similar upload and download speeds
 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
 Other (WRITE IN)
 Don't know (Read out)

SWITCHING SERVICE

Q35. Has your <<company/household>> ever used any methods other than the one(s) you currently use to connect to the internet? DO NOT READ OUT. SINGLE CODE

Yes
 No – SKIP TO Q37
 Don't know – SKIP TO Q37

ASK IF USED OTHER METHODS (CODE YES AT Q35). OTHERS SKIP TO Q37

Q36. What method<< did you/your company>> use previously to connect to the internet? If you have switched more than once before please think about your last connection. DO NOT READ OUT. SINGLE CODE
 IF NECESSARY: We are talking now about your type of connection not the individual company that provides this

Dial-up using a normal telephone line and a standard 56K modem
 ISDN line
 Broadband (unspecified)
 Broadband access via ADSL
 Broadband access via cable modem
 SDSL broadband
 Leased line
 Other (WRITE IN)
 Don't know

ASK IF SWITCHED TO BROADBAND: BUSINESS = (Code 3, 4 at QG/QH and not code 2 at QI) AND (Code 1 or 2 or 6 or 7 or 8 at Q36)/RESIDENTIAL = (Code 3 AT QF) AND (Code 1 or 2 or 6 or 7 or 8 at Q36)

Q43i. Why did you change your internet connection to start using an ADSL or cable broadband connection? DO NOT READ OUT. CODE ALL MENTIONED
 PROBE TWICE: Is there anything else?

Basic features:
 To have a permanent, i.e. "always on", connection to the internet
 Faster connection speeds/improved speed
 More reliable connection
 To be able to use the telephone at the same time as being online
 Part of a bundle e.g. with TV or other telephone lines
 Functions:
 Instant access to email
 To be able to watch TV/films
 To be able to download/listen to music
 To be able to play games
 To be able to exchange attachments quicker
 To be able to use VOIP/make phone calls over the internet
 To be able to connect more than one PC at a time
 To be able to send/upload information or receive/download information faster
 Costs/use:
 The costs have come down
 Cheaper/savings
 Better value for money
 Did not use our previous connection enough
 Other (WRITE IN)
 Don't know

BUSINESS SAMPLE ONLY: ONLY ASK IF MOVED TO A LEASED LINE/SDSL CONNECTION ((QG or QH=5 AND Q36 IS A CODE 1 or 2 or 3 or 4 or 5 or 6 or 8) OR (QI=2 AND Q36 IS A CODE 1 or 2 or 3 or 4 or 5 or 7 or 8))

Q44i. Why did you change your previous connection to an SDSL connection or Leased Line? DO NOT READ OUT.
CODE ALL MENTIONED

PROBE TWICE: Is there anything else?

- To enable us to host web services
- To allow clients to buy from us online
- To allow faster access to our internet
- To have a faster connection
- To be able to send/upload information at the same speed as receiving/downloading information
- To be able to exchange attachments quicker
- The costs have come down
- Cheaper/savings
- More reliable connection
- Other (WRITE IN)
- Don't know

Q37. How long have you had your current internet connection, that is your <<INSERT MAIN INTERNET CONNECTION FROM QG/H FOR BUSINESS OR QF FOR RESIDENTIAL>>?

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

ASK ALL EXCEPT LEASED LINES USERS (I.E. CODE 5 ON QH FOR BUSINESSES)

Q38. How likely are you to change your type of internet connection in the next 12-18 months, for example to dial up, broadband, faster broadband, leased lines etc.?

READ OUT. SINGLE CODE

- Certain to
- Very likely
- Fairly likely
- Fairly unlikely
- Very unlikely
- Certain not to
- Don't know (Don't read out) – SKIP TO Q48

IF LIKELY TO SWITCH (TOP THREE BOXES) AT Q38

Q39. What type of internet connection are you planning to use?

DO NOT READ OUT. SINGLE CODE

- Dial-up using a normal telephone line and a standard 56K modem
- ISDN line
- Broadband access via ADSL
- Broadband access via cable modem
- Faster broadband access (DO NOT ALLOW IF ON ISDN/DIAL UP = CODE 1 OR 2 AT QG/QH BUSINESS, CODE 1 OR 2 AT QF RESIDENTIAL)
- SDSL broadband
- Leased line
- Wireless broadband – fixed wireless access or satellite
- Broadband (unspecified)
- Other (WRITE IN)
- Don't know

ASK IF 'FASTER BROADBAND' AT Q39

Q40. Is that using the same technology or a different method of broadband connection?

SINGLE CODE

- Same
- Different
- Don't know

ASK IF 'BROADBAND UNSPECIFIED' (CODE 9 AT Q39)/'DIFFERENT' (CODE 2 AT Q40)

Q40a Which type of connection method would you use?
READ OUT. SINGLE CODE

ADSL
Cable
Fixed radio access or satellite
SDSL
Other
Don't know

LEASED LINES USERS (BUSINESS SAMPLE ONLY – CODE 5 AT QH)

Q42. How likely are you to start using broadband, whether that be via cable, ADSL, satellite or fixed radio wireless, in the next 12-18 months?

DO NOT READ OUT. SINGLE CODE

IF NEEDED: This can be as well as or instead of your leased lines.

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

ASK IF PLANNING TO SWITCH TO BROADBAND: BUSINESS = ((Code 1 or 2 or 5 or 6 at QG/H or Code 2 at QI) AND (Code 3 or 4 at Q39 or Code 1 or 2 at Q40a)) OR LEASED LINE USERS = ((Code 5 at QG/H) AND (Code 1 or 2 or 3 at Q42)) OR RESIDENTIAL = ((Code 1 or 2 or 4 at QF) AND (Code 3 or 4 at Q39 or Code 1 or 2 at Q40a))

Q43ii. Why do you plan to change your internet connection to start using an ADSL or cable broadband connection? DO NOT

READ OUT. CODE ALL MENTIONED
PROBE TWICE: Is there anything else?

Basic features:
To have a permanent, i.e. "always on", connection to the internet
Faster connection speeds/improved speed
More reliable connection
To be able to use the telephone at the same time as being online
Part of a bundle e.g. with TV or other telephone lines
Functions:
Instant access to email
To be able to watch TV/films
To be able to download/listen to music
To be able to play games
To be able to exchange attachments quicker
To be able to use VOIP/make phone calls over the internet
To be able to connect more than one PC at a time
To be able to send/upload information or receive/download information faster
Costs/use:
The costs have come down
Cheaper/savings
Better value for money
Did not use our previous connection enough
Other (WRITE IN)
Don't know

BUSINESS SAMPLE ONLY: ONLY ASK IF PLANNING TO MOVE TO A LEASED LINE/SDSL CONNECTION (Q39= Code 6 or 7)

Q44. Why do you plan to change your current connection to an <<SDSL connection or Leased Line>>? DO NOT READ OUT. CODE ALL MENTIONS

PROBE TWICE: Is there anything else?

To enable us to host web services
To allow clients to buy from us online
To allow faster access to our internet
To have a faster connection
To be able to send/upload information at the same speed as receiving/downloading information
To be able to exchange attachments quicker
The costs have come down
Cheaper/savings
More reliable connection

Other (WRITE IN)
Don't know

ASK Q45 IF NARROWBAND USERS (BUSINESS QH- CODE 1 OR 2, RESIDENTIAL QF – CODE 1 OR 2) WHO ARE LIKELY TO SWITCH TO BROADBAND ADSL, CABLE OR FIXED RADIO/SATELLITE (Q39=3 or 4 or 8 or 9). OTHERS SKIP TO Q46

Q45. You mentioned earlier 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, how likely would you still be to switch to broadband? Would you be.....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 Q46 OF LEASED LINES USERS (I,E. CODE 5 QH) WHO ARE LIKELY TO START USING BROADBAND (TOP 3 BOXES AT Q42). OTHERS SKIP TO Q47

Q46. You mentioned earlier that you were thinking about using broadband in the future. If the price of broadband internet subscription charges were to rise by 10% across all providers, how likely would you still be to start using broadband? Would you be.....READ OUT. SINGLE CODE

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

ASK IF ANSWER NO AT Q35

Q47. Have <<you/your company>> even thought about switching your internet connection to another type of internet connection in the last 12 months? We are talking about different types of connection not changing suppliers.

DO NOT READ OUT. SINGLE CODE

Yes
No
Don't know

ASK Q48 OF ALL WHO HAVE NOT SWITCHED QT Q35/UNLIKELY TO SWITCH (BOTTOM 4 BOXES AT Q38 OR BOTTOM 4 BOXES AT Q42)

Q48. What are the things that put you off or prevent you from switching the current means by which you connect to the internet? DO NOT READ OUT. TYPE IN ANSWER IN FULL. SINGLE CODE. PROBE TWICE: Is there anything else?

Other (WRITE IN)
No reason to change/Happy with things as they are PROBE: Why is that?
Don't know

USE FOR CODEFRAME ONLY
Satisfied with the way it works/current speeds/current functionality
Don't have time to look around/research options
The risk of things going wrong/downtime during the transition
Not aware of what else is available/don't know enough
Don't know how to go about changing
It is hard to compare/tell the difference between different types of connection available
Would cost more
Insufficient savings
We do not use the internet enough/do not need it
Concerns over security

Fear of being tied in/signing up for a year
Not available in my area
Need a BT phone line for DSL
Have phone line with them/have TV with current provider-
Using for other services e.g. web space, email accounts, mobile, fixed line, VOIP
Don't want to change email address
Prefer the current technology/connection type
Reliability issues with other connection types
Other connections are slower
No other connections available for what I want

ASK ALL

Q50. Have you changed your supplier for any of the following services over the last two years? READ OUT. CODE ALL MENTIONED

Q51. Have you changed your supplier for any of these services in the last five years? READ OUT ALL NOT MENTIONED AT Q50. CODE ALL MENTIONED

Fixed telephone line, the company that you pay for the line itself
Fixed telephone service, the company that you pay for your calls
Mobile phone network
Electricity or gas supplier
Cable television (RESIDENTIAL ONLY)
Car insurance (RESIDENTIAL ONLY)
Home insurance (RESIDENTIAL ONLY)
None of the above
Don't know/can't remember

BACKGROUND USAGE QUESTIONS

Q52. How important is the internet currently to your business/to you personally. Is it...
READ OUT. SINGLE CODE

Essential
Very important
Fairly important
Neither important nor unimportant
Not very important
Not at all important
Don't know

ASK Q53 OF ALL USING ASYMM/SMM BROADBAND AS MAIN METHOD – I.E CODES 3, 4 OR 6 AT QG/H FOR BUSINESS AND CODES 3 OR 4 AT QF FOR RESIDENTIAL) OTHERS SKIP TO Q54

Q53. To what extent you agree or disagree that there are good alternatives to broadband at the moment. Would you say you....READ OUT. SINGLE CODE

Completely agree
Slightly agree
Neither agree nor disagree
Slightly disagree
Completely disagree
Don't know (Do not read out)

RESIDENTIAL ONLY

Q54. How many hours per week does your household typically spend online.
READ OUT IF NECESSARY. SINGLE CODE

Less than an hour
1-2 hours
3-5 hours
6-10 hours
11-15 hours
16-20 hours

21-30 hours
More than 30 hours
Don't know

ASK ALL

Q55. Which, if any, of the following technologies do you ever use to access the internet? READ OUT. CODE ALL MENTIONED

Mobile phone
Wireless LAN ie hotspots in cafes, hotels etc
3G cards
None of the above
Don't know

Q56 Are you aware if there is a *maximum* speed broadband you could use at your <<business>> address? IF YES, What is the maximum speed available?

Not aware of maximum speed
Yes - Up to 512 kbit (1/2 Mb)
Yes - Up to 1Mb
Yes - Up to 2Mb
Yes - Up to 4Mb
Yes - Up to 8Mb
Yes - Other (WRITE IN)
Don't know

ASK FOR THOSE WITH AN ASSYMETRIC CONNECTION - I.E. (CODE 1 OR 3 AT QI) OR (CODE 1 OR 3 AT QJ) FOR BUSINESS OR CODE 1 OR 3 AT QH FOR RESIDENTIAL

Q57. Are you aware at present that your current connection method does not allow you to upload (i.e. send) information at the same speed as you download (i.e. receive) it?
DO NOT READ OUT. SINGLE CODE

Yes
No
Don't know

ASK FOR THOSE WITH AN ASSYMETRIC CONNECTION - I.E. (CODE 1 OR 3 AT QI) OR (CODE 1 OR 3 AT QJ) FOR BUSINESS OR CODE 1 OR 3 AT QH FOR RESIDENTIAL

Q58. Would you be prepared to pay extra in the future in order to be able to upload (i.e. send) information at the same speed as you can download (i.e. receive information)?
DO NOT READ OUT. SINGLE CODE

Yes
No
Don't know

PROFILE BUSINESS

Q59. 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

Q60. RECORD GENDER (do not ask). SINGLE CODE

Male
Female

Q61. Including yourself, how many adults aged 18 or above are there in your household? SINGLE CODE

Q62. How many children under the age of 18 are there in your household? SINGLE CODE

DO NOT ASK Q63 IF NONE AT Q62

Q63. Any how many children are between the ages of 12 and 18? SINGLE CODE

None
1
2
3
4
5
6
7
8
9
10+
Prefer not to say

Q64. 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

Q65. 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

Additional study - June 2006

INTRODUCTION

Good morning/afternoon/evening, my name is _____ from Jigsaw Research. We are calling on behalf of Ofcom, the regulator for the communications industries in the UK to follow up on a survey about how people/businesses use the internet that you kindly participated in earlier this year. In that survey we asked you some questions about what you would do if the price of your internet service were to go up by 5% or 10% just for your current speed. We now need to find out the answer to a slightly different question if you are willing to speak to us – it will take less than 5 minutes of your time.

Q1 First of all, can I confirm that your main internet connection is still <<INSERT MAIN CONNECTION TYPE FROM PREVIOUS SURVEY>>?

Yes.....Skip to QA1
NoContinue
Don't knowContinue

ASK QF-QH TO RESIDENTIAL CONSUMERS ONLY

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. READ OUT. SINGLE CODE

7. Dial-up using a normal telephone line and a standard 56K modem
= CLOSE
8. Access via ISDN line = CLOSE
9. Broadband access delivered to your home either via cable or through a fixed line (although you may have a wireless connection in your home) = CONTINUE
10. 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 = CONTINUE
11. Other..... CLOSE
12. Don't know (Don't read out)..... CLOSE

ASK IF BROADBAND (CODE 3) AT QF

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 or Telewest using a cable modem
3. Don't know (Don't read out)

ASK QH IF CODE 4 AT QF

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/ADSL)
2. No - have similar upload and download speeds (Symmetric/SDSL)
3. Don't know (Assume Asymmetric/ADSL)

ASK QG/H - QJ TO BUSINESSES ONLY

QG/H By which of the following means does your business currently connect to the internet? If you have more than one way of connecting please just tell me your main way of connecting. READ OUT. SINGLE CODE

- | | |
|---|----------------|
| 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 phone lines - ADSL or SDSL although you may have a wireless connection in your office) | Continue to QI |
| 4. Broadband access via cable modem..... | Skip to QA1 |
| 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 your premises and the internet providers base station, rather than using a telephone line or a cable television network. | Skip to QJ |
| 7. 3G datacard in mobile devices | CLOSE |
| 8. Other..... | CLOSE |
| 9. Don't know | CLOSE |

ASK QI IF CODE 3 AT QH

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

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

ASK QJ IF CODE 6 AT QH

QJ. Is that asymmetric broadband or symmetric access? SINGLE CODE. READ OUT IF NECESSARY

1. Asymmetric (IF UNSURE i.e. has faster download than upload speeds)
2. Symmetric (IF UNSURE: i.e. has similar upload and download speeds)
- Don't know (ASSUME ASYMMETRIC/ADSL)

ASK ALL ON CABLE OR ADSL AS MAIN CONNECTION TYPE

QA1 Last time we talked about a price rise just for your particular speed of connection. Now, if the price of all the packages using your internet connection type (READ OUT RESPONDENT'S CONNECTION TYPE; ADSL, CABLE AS APPROPRIATE) were to rise by 10% per month, that is that all the providers of << RESPONDENT'S CONNECTION TYPE; ADSL, CABLE AS APPROPRIATE>> were to raise the price of all their connection packages by 10%, not including any services you may pay extra for such as making calls, security etc, I'd like to know which of the following courses of action you would consider.

Please assume that the price increase for the service you are on is for *all* companies that provide this type of internet service, and for *all* speeds. You can mention as many of the following options as you like.

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

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 broadband connection at the increased price
Change to use a *different way* of accessing the internet, including a different type of broadband connection
Stop using the internet altogether
Other (write in.....)
Don't know (Don't read out)

ASK IF MULTICODE AT QA1

QA2 And which of these would you be most likely to do? READ OUT IF NECESSARY. USE SAME ROTATE ORDER AS PREVIOUS. SINGLE CODE.

Continue to use current broadband connection at the increased price
Change to use a *different way* of accessing the internet, including a different type of broadband connection
Stop using the internet altogether
Other (INSERT FROM QA1)
Don't know

DO NOT ASK QA3 IF DON'T KNOW AT QA1 (if single code at QA1) or QA2 (if multicode at QA1)

QA3 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)

IF MENTION THEY WOULD USE DIFFERENT WAY OF ACCESSING AT QA1 (if single code at QA1) or QA2 (if multicode at QA1)

QA4a What type of connection do you think you would be most likely to use to access the internet? DO NOT READ OUT. SINGLE CODE

Switch to a normal telephone line dial up connection
Switch to an ISDN line
Switch to a leased line
Switch to SDSL
Switch to a satellite or fixed wireless broadband connection
Switch to broadband via ADSL
Switch to broadband via Cable
Switch to a different type of broadband connection (unspecified) GO TO QA4b
Other (WRITE IN)
Don't know – GO TO QA5

IF CODE – SWITCH TO A DIFFERENT BROADBAND SERVICE (UNSPECIFIED) AT QA4a

QA4b. 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

DO NOT SHOW CURRENT CONNECTION TYPE

Switch to broadband via ADSL
Switch to broadband via Cable
Switch to SDSL
Switch to a satellite or fixed wireless broadband connection
Don't know (READ OUT)

IF DON'T KNOW AT QA4a.

QA5. 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. SINGLE CODE

DO NOT SHOW CURRENT CONNECTION TYPE

- Switch to a normal telephone line dial up connection
- Switch to an ISDN line
- Switch to a leased line, which would provide a dedicated service, fast speed, similar upload and download speeds
- 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
- Switch to broadband via ADSL
- Switch to broadband via Cable
- Other (WRITE IN)
- Don't know (READ OUT)

ASK B SERIES IF MAIN CONNECTION TYPE IS CABLE OR ADSL, AND, IF "Changing to use a *different way* of accessing the internet" OR "other" MENTIONED AT QA1 (if single code at QA1) or QA2 (if multicode at QA2)

QB1 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 *ADSL and Cable* were to rise by 10% per month.

Please again assume that the price increase is for *all* companies that provide these types of internet services, and for *all* speeds but this is not including any services you may pay extra for such as making calls, security etc.

You can mention as many of the following options as you like.

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

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 your current broadband connection at the increased price
- Change to use a *different way* of accessing the internet, including a different type of broadband connection
- Stop using the internet altogether
- Other (write in.....)
- Don't know (Don't read out)

ASK IF MULTICODE AT QB1

QB2 And which of these would you be most likely to do? READ OUT IF NECESSARY. USE SAME ROTATE ORDER AS PREVIOUS. SINGLE CODE.

- Continue to use current broadband connection at the increased price
- Change to use a *different way* of accessing the internet, including a different type of broadband connection
- Stop using the internet altogether
- Other (INSERT FROM QB1)
- Don't know

DO NOT ASK QB3 IF DON'T KNOW AT QB1 (if single code at QB1) or QB2 (if multicode at QB1)

QB3 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)

IF MENTION THEY WOULD USE DIFFERENT WAY OF ACCESSING AT QB1 (if single code at QB1) or QB2 (if multicode at QB1)

QB4a What type of connection do you think you would be most likely to use to access the internet? DO NOT READ OUT.
SINGLE CODE

Switch to a normal telephone line dial up connection
Switch to an ISDN line
Switch to a leased line
Switch to SDSL
Switch to a satellite or fixed wireless broadband connection
Switch to broadband via ADSL
Switch to broadband via Cable
Switch to a different type of broadband connection (unspecified) GO TO QB4b
Other (WRITE IN)
Don't know – GO TO QB5

IF CODE – SWITCH TO A DIFFERENT BROADBAND SERVICE (UNSPECIFIED) AT QB4a

QB4b. 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

DO NOT SHOW CURRENT CONNECTION TYPE

Switch to broadband via ADSL
Switch to broadband via Cable
Switch to SDSL
Switch to a satellite or fixed wireless broadband connection
Don't know (READ OUT)

IF DON'T KNOW AT QB4a.

QB5. 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. SINGLE CODE

DO NOT SHOW CURRENT CONNECTION TYPE

Switch to a normal telephone line dial up connection
Switch to an ISDN line
Switch to a leased line, which would provide a dedicated service, fast speed, similar upload and download speeds
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
Switch to broadband via ADSL
Switch to broadband via Cable
Other (WRITE IN)
Don't know (READ OUT)

ASK C SERIES IF "Changing to use a *different way* of accessing the internet" OR "other" MENTIONED AT QB1, OR, IF MAIN CONNECTION TYPE IS SDSL/ FIXED WIRELESS/ SATELLITE

QC1 (IF ON ADSL OR CABLE, SAY And finally) I'd like to know if the price of all types of broadband internet connection packages were to rise by 10% per month which of the following courses of action you would consider. This means

that the price SDSL, satellite or fixed wireless broadband connections, ADSL and Cable connections would all be increased.

Please again assume that the price increase is for *all* companies that provide these types of internet services, and for all speeds but this is not including any services you may pay extra for such as making calls, security etc.

You can mention as many of the following options as you like.

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

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.

- Continuing to use your current broadband connection at the increased price
- Changing to use a *different way* of accessing the internet, including a different type of broadband connection
- Stopping using the internet altogether
- Other (write in.....)
- Don't know (Don't read out)

ASK IF MULTICODE AT QC1

QC2 And which of these would you be most likely to do? READ OUT IF NECESSARY. USE SAME ROTATE ORDER AS PREVIOUS. SINGLE CODE.

- Continue to use current broadband connection at the increased price
- Change to use a *different way* of accessing the internet, including a different type of broadband connection
- Stop using the internet altogether
- Other (INSERT FROM QC1)
- Don't know

DO NOT ASK QB3 IF DON'T KNOW AT QC1 (if single code at QC1) or QC2 (if multicode at QC1)

QC3 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)

IF MENTION THEY WOULD USE DIFFERENT WAY OF ACCESSING AT QC1 (if single code at QC1) or QC2 (if multicode at QC1)

QC4a What type of connection do you think you would be most likely to use to access the internet? DO NOT READ OUT. SINGLE CODE

- Switch to a normal telephone line dial up connection
- Switch to an ISDN line
- Switch to a leased line
- Switch to SDSL
- Switch to a satellite or fixed wireless broadband connection
- Switch to broadband via ADSL
- Switch to broadband via Cable
- Switch to a different type of broadband connection (unspecified) GO TO QC4b

Other (WRITE IN)
Don't know – GO TO QC5

IF DON'T KNOW AT QC4a.

QC5. 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

DO NOT SHOW CURRENT CONNECTION TYPE

Switch to a normal telephone line dial up connection
Switch to an ISDN line
Switch to a leased line, which would provide a dedicated service, fast speed, similar upload and download speeds
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
Switch to broadband via ADSL
Switch to broadband via Cable
Other (WRITE IN)
Don't know (READ OUT)