



Commission for
Communications Regulation

Market Review - Retail Access to the Public Telephone Network at a Fixed Location for Residential and Non Residential Customers

ComReg grants extension to consultation period for ComReg Document 12/117 and publishes associated documents to ComReg Document 12/117a

Information Notice

Reference: ComReg 12/133

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An Coimisiún um Rialáil Cumarsáide

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Additional Information

Document to which this notice relates:	12/117 and 12/117a
Date:	26 October 2012

The Commission for Communications Regulation ("ComReg") has today extended the deadline for the submission of responses to its Consultation Paper and draft decision entitled "*Market Review: Retail Access to the Public Telephone Network at a Fixed Location for Residential and Non Residential Customers*" ("the FVA Consultation Paper") (ComReg Document 12/117), which was published on ComReg's website www.comreg.ie on 26 October 2012.

The original response date was 5.00pm, Friday, 21 December, 2012. This has now been extended by one month. The new due date for response is on or before 5.00pm, Monday, 21, January 2013.

In addition, ComReg has published the deployed residential and business survey questionnaires used in compiling ComReg Document 12/117a ("the Research Perspective Report").¹ The survey questionnaires are attached below at Appendix 1 and Appendix 2 respectively.

ComReg engaged The Research Perspective to carry out end user research to support ComReg's review and analysis of the retail access (i.e. FVA) and voice calls market(s) provided at a fixed location. The required research of both business and consumer populations was conducted via nationally representative surveys. The Research Perspective Report sets out in detail the insights derived by The Research Perspective from the survey analysis and The Research Perspective's key conclusions. For ease of reference and in the interests of consistency, the Research Perspective Report 12/117a is identical to the report published as ComReg Document 12/96a (the latter document having been published by ComReg in September 2012 as part of the Fixed Voice Call Termination Market Review).²

¹ Market Review – Retail Access to the Public Telephone Network at a Fixed Location for Residential and Non Residential Customers (Appendix A), ComReg Document 12/117a, 26 October 2012 at http://www.comreg.ie/publications/market_review__retail_access_to_the_public_telephone_network_at_a_fixed_location_for_residential_and_non_residential_customers_appendix_a.583.104220.p.html

² ComReg Document 12/96 at: http://www.comreg.ie/publications/market_review_-_wholesale_voice_call_termination_services_provided_at_a_fixed_location.583.104189.p.html

Appendix: 1 ComReg Fixed Line Retail Consumer Survey

CONNECTION AND SERVICE QUESTIONS

Good morning/afternoon. I'm _____ from Millward Brown, an independent research company. We're conducting a survey on behalf of the Commission for Communications Regulation about your use of fixed line phone and mobile services.

Everything you say to me will be treated in strict confidence; information will be aggregated and will be used for statistical purposes only.

[ACCESS METHODS]

Q10

In your home, do you have a fixed line phone connection? (This includes corded and cordless handsets and is any phone line with a number starting with an area code – such as 01 for Dublin or 021 for Cork – or a phone number starting with 076 as distinct from mobile numbers which all start with 08-something. It could also include using a phone line that is used for internet or broadband only.)

1. Yes [INTERVIEW NOTE: THIS IS AN ACTIVE CONNECTION – NOT JUST A WIRE TO THE HOME]
2. No

[IF Q10=1]

Q20

Can I confirm that you are the person in your household responsible or jointly responsible for making decisions for the household in terms of choice and spend related to your fixed line phone?

1. Yes
2. No [TERMINATE THE INTERVIEW]

[IF Q10=1]

Q25

In your home, do you have more than 1 fixed line phone connection?

1. No
2. Yes _____ [CAPTURE NUMBER]

[IF Q25>1]

Q26**OPEN**

Why do have more than 1 fixed line phone connection?

[IF Q10=2]

Q30

Can I confirm that you are the person in your household who is responsible or jointly responsible for making the decisions for the household relating to telecommunication services in the home (for instance this could be the decision to get a fixed line phone in your home in the past or future)?

1. Yes
2. No [TERMINATE THE INTERVIEW]

Throughout this interview, when I refer to a fixed line phone, I mean a phone which has number starting with an area code – such as 01 for Dublin or 021 for Cork – or a phone number starting with 076 – as distinct from mobile numbers which all start with 08-something.

[IF Q10=1]

Q40

[IF Q25>1]

Can I confirm that you have a phone connected (either via a corded or cordless handset) to one or more of your fixed line connections?

[ELSE]

Can I confirm that you have a phone connected (either via a corded or cordless handset) to your fixed line connection?

1. Yes
2. No – I use it for broadband only
3. No – the line is not in use [NOTE: THIS IS A CATCH FOR ANY RESPONDENT ANSWERING YES TO Q10 REFERRING TO THE PHYSICAL WIRE RATHER THAN AN ACTIVE CONNECTION]

[IF Q10=1 AND Q25=1 AND Q40=1]

Q50

What is the area code of your phone line?

____ [CAPTURE]

[IF Q10=1 AND Q25=2 AND Q40=1]

Q60

What is that area code of the phone you mainly use for personal calls?

____ [CAPTURE]

[IF Q10=1 AND Q25=2]

Q65

What are the area codes of the other phones

__ __ ____ [CAPTURE ALL]

[SERVICES]

Q70

I would now like to ask you a question about how telecommunications services are delivered to your household. We know that you may be able to access the internet or make calls wirelessly in your household using a wireless modem or a cordless phone. However, the question that I'm about to ask you relates to the network technology used to connect your modem or telephone (base or cordless-phone-cradle) to the wider network beyond your house. Which of the following are being used in your home:

	Traditional fixed line connection (either using a wired or wireless in-house connection)	Cable TV connection (either using a wired or wireless in-house connection)	Fixed wireless connection	Satellite
Voice Telephone service	Y/N	Y/N	Y/N	Y/N
A broadband connection where the internet is always available (This could be accessed using a wi-fi connection or with a wired connection)	Y/N	Y/N	Y/N	Y/N

A dial-up internet connection where you connect to the internet when you want to use it	Y/N	NA	NA	NA
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	Broadcast - with an aerial on the roof or on top of the television (rabbits' ears)	Cable TV connection	Fixed wireless connection	Satellite
Television	Y/N	Y/N	NA	Y/N

[INTERVIEWER NOTES:

- 1. WHERE RESPONDENT SAYS THEY HAVE WIRELESS BROADBAND IT IS IMPORTANT TO CHECK IF THIS IS VIA A TRADITIONAL FIXED LINE CONNECTION USING A WIFI/WIRELESS CONNECTION OR VIA A FIXED WIRELESS LINE WHICH USES AN ANTENNA AS DEFINED IN 2 BELOW.**
- 2. FIXED LINE WIRELESS LINES ARE FIXED LINES BUT THE WIRE CONNECTS TO AN ANTENNA WHICH IS ATTACHED TO THE BUILDING (E.G. ON THE ROOF OR INSIDE THE HOME);**
- 3. TRADITIONAL FIXED LINE CONNECTION CAN INCLUDE A COPPER OR A OPTICAL FIBRE CONNECTION.]**

[IF Q70.TELEPHONE=N SET NOPHONE=TRUE] (i.e. no fixed line phone)

Q80

Do you access the internet in your home from a smart phone using your mobile phone operator's service? (A smart phone is one which allows you to access email, download apps and surf the web)

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

Q90

Do you access the internet in your home from your computer using mobile broadband (often using a USB modem or a dongle which you plug into your computer) supplied by a mobile phone operator and which can be used wherever your mobile phone operator has network coverage?

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

[IF Q70.BROADBAND = NO FOR ALL OPTIONS]**Q95**

Why don't you have a fixed broadband connection in your home?

1. I don't need internet access at home
2. I prefer to use dial-up internet access
3. I prefer to use mobile internet over the phone
4. I prefer to use mobile broadband modem (e.g. USB or dongle) from a mobile phone operator
5. There is no broadband available in my area
6. I want to reduce my household bills
7. I cannot afford broadband
8. Don't know
9. Other

[IF Q70.TELEPHONE =Y]**Q100****SELECT ONE**

Do you buy any of the following services as part of a bundle with your fixed line voice telephone service?

Dial-up internet	Y/N
Broadband	Y/N
Broadband + TV	Y/N
TV	Y/N
Mobile telephony	Y/N
Mobile telephone + Broadband	Y/N
Mobile telephone and TV	
Mobile telephone + Broadband + TV	Y/N
Other	Y/N
	_____ [CAPTURE]

[IF

Q70.TELEPHONE =Y]**Q120****[IF Q25>1 (MORE THAN 1 PHONE)]**

Returning to your fixed line phones, which company provide the fixed line phone you mainly use for personal calls?

[ELSE]

Returning to your fixed line phone, which company provides your fixed line phone?

1. Eircom
2. UPC or ntl or Chorus
3. Vodafone at home
4. Imagine or Access Telecom
5. Digiweb
6. Magnet
7. IFA Telecom
8. Airspeed
9. Blueface
10. Fastcom
11. Greencom
12. Hive Telecom
13. Pure Telecom
14. UTV Interactive
15. Ripplecom (also called Amocom, Last Mile)
16. Satellite Broadband
17. Talk Talk
18. Other ____ [CAPTURE]

[IF Q25>1 (MORE THAN 1 PHONE)]**Q130**

Thinking about your other fixed line phone, which companies provide these fixed line phones?

[SELECT MULTIPLE]

1. Eircom
2. UPC or ntl or Chorus
3. Vodafone at home
4. Imagine or Access Telecom
5. Digiweb
6. Magnet
7. IFA Telecom
8. Airspeed
9. Blueface
10. Fastcom
11. Greencom

12. Hive Telecom
13. Pure Telecom
14. UTV Interactive
15. Ripplecom (also called Amocom, Last Mile)
16. Satellite Broadband
17. Talk Talk
18. Other ____ [CAPTURE]

[IF Q70.BROADBAND/DIAL-UP = YES FOR ANY OPTIONS]

Q135

Earlier you said that you had fixed internet access, which supplier provides this service?

[IF Q90=1]

(This doesn't include the mobile broadband (where you typically use a USB modem or a dongle which you plug into your computer) supplied by a mobile phone operator)

[IF Q80=1]

(This doesn't include accessing the internet from your smart phone)

1. Eircom
2. UPC or ntl or Chorus
3. Vodafone at home
4. Imagine or Access Telecom
5. Digiweb
6. Magnet
7. Airspeed
8. Fastcom
9. Pure Telecom
10. UTV Interactive
11. Ripplecom (also called Amocom, Last Mile)
12. Satellite Broadband (also called Too Way)
13. Casey
14. Crossan

[If Q70.FWA]

15. Rapid Broadband

[If Q70.FWA]

16. Ker Broadband

[If Q70.FWA]

17. Permanet
18. Other ____ [CAPTURE]

[IF Q90=1]

Q140

Which company provides your mobile broadband service, e.g. using a USB or dongle or data card which you plug into your computer?

1. Vodafone
2. O2
3. Meteor
4. 3 Ireland (also known as H3GI)
5. Tesco Mobile
6. EMobile
7. JustMobile
8. Postfone
9. Other_____ [CAPTURE]
10. Don't know

USAGE QUESTIONS

[IF Q10=1 OR Q70.telephone=Yes]

Q300

And how often do you use your fixed line phone for making/receiving calls?

[IF Q25>1]

Just think about the fixed line phone which you use most often?

1. More than once a day
2. Approximately once a day
3. Approximately once every couple of days
4. Approximately once a week
5. Less frequently

Q310

Do you own and use a mobile phone?

1. Yes
2. No

[IF Q310=1]

Q315

And who is your current mobile phone operator?

1. Vodafone
2. O2
3. Meteor
4. 3 Ireland (also known as H3GI)
5. Tesco Mobile
6. eMobile
7. JustMobile
8. Postfone
9. Other _____ [CAPTURE]
10. Don't know

[IF Q310=1]

Q320

Is your mobile plan/package a prepay package (where you buy credit before you can make a call) or bill pay package (where you have a contract with your operator and subsequently receive a bill for calls, texts or other services you used in the previous month)?

1. Prepay
2. Bill pay
3. Both (if you have more than 1 mobile phone)

[IF Q310=1]

Q330

And how often do you use your mobile phone for making/receiving calls in your home?

1. More than once a day
2. Approximately once a day
3. Approximately once every couple of days
4. Approximately once a week
5. Less frequently

[IF BROADBAND CONNECTION IN HOME]**Q340**

Do you use any of Skype, Internet calls or VoIP in your home from a computer, laptop, tablet, or mobile smart phone?

1. Yes
2. No

[IF Q340=1]**Q350**

And how often do you use Skype, Internet calls or VoIP in your home?

1. More than once a day
2. Approximately once a day
3. Approximately once every couple of days
4. Approximately once a week
5. Less frequently

DEMOGRAPHIC QUESTIONS

Before asking you more questions about your phone usage, I would like to ask you some general questions about yourself.

Q400

RECORD GENDER

1. Male
2. Female

Q410

May I ask what age category you were on your last birthday?

[IF NECESSARY, PROMPT WITH AGE BANDS]

SHOWCARD

1. 15-17
2. 18 - 25
3. 26 - 35
4. 36 - 45
5. 46 - 55
6. 56 - 65
7. 65+
8. Refused

Q420

Which of the following best describes your circumstances?

1. I live in the home that I own
2. I live in the home owned by a family member
3. I rent my home
4. Other

Q430

**[INTERVIEWER: INSERT COUNTY CODE FROM LIST INCLUDING 3 DUBLIN CITY AREAS:
CORPORATION, RATHDOWN/DUN LAOGHAIRE, FINGAL]**

Q440

Which of the following best describes your occupation

1. Full-time education
2. Full-time employment outside of the home
3. Part-time employment outside of the home
4. Carer in the home (looking after relative or family)
5. Employment in the home
6. Not currently in paid employment

Q450

What is the occupation of the chief income earner in your household?

[CAPTURE OCCUPATION AND CODE AS SOCIO-ECONOMIC GROUP]

1. AB
2. C1
3. C2
4. DE
5. F [RECORD ALL FARMERS]
6. Refused

Q470

Do you live with other people or do you live alone?

1. I live alone
2. I live with other people

[IF Q470=2]

Q480

How many people over the age 18 do you live in your home?

1. 0
2. 1
3. 2
4. 3
5. 4
6. 5
7. 6
8. 7 or more

[IF Q470=2]

Q485

How many people under the age 18 do you live in your home?

1. 0
2. 1
3. 2
4. 3
5. 4
6. 5
7. 6
8. 7 or more

[IF Q480>1]

Q490

How many people who live in your home (apart from yourself) own and regularly use a mobile phone?

1. 0
2. 1
3. 2
4. 3
5. 4
6. 5
7. 6
8. 7 or more

[IF NOPHONE=FALSE]

Q495

Thinking about the calls made from your fixed line phone in a typical month by all members of your home, please provide an approximate breakdown of the amount of time spent on your fixed line phone for each of the following?

[NOTE TO INTERVIEWER: ADD TO 100%]

1. To international phone numbers ___%
2. To local/national fixed line numbers ___%
3. To mobile phones ___%
4. To directory enquires , competition lines, voting lines and other premium rate numbers ___%
5. I Don't know

Q496

Thinking about the calls made from mobile phones in a typical month by all members of your home, please provide an approximate breakdown of the amount of time spent on your mobile phone for each of the following?

[NOTE TO INTERVIEWER: ADD TO 100%]

1. To international phone numbers ___%
2. To local/national fixed line numbers ___%
3. To mobile phones ___%
4. To directory enquires , competition lines, voting lines and other premium rate numbers ___%
5. I Don't know

HOME PHONE OWNERS: PRICES

[IF NOPHONE=TRUE GOTO NEXT SECTION]

Q500

How often do you receive a bill from the supplier of your fixed line phone supplier (this can be a printed bill or an online or email bill)?

1. Monthly
2. Every two months
3. Every three months

Q505

How much do you pay per bill for the line rental?

1. € ____ [CAPTURE]
2. Not charged line rental [CAPTURE – DO NOT PROMPT]
3. Don't know – line rental part of a package with calls [CAPTURE – DO NOT PROMPT]
4. Don't know

Q508

When you are thinking about the cost of your fixed line telephone package or bundle, do you think about the cost of the line rental and calls separately?

1. No – I am more concerned with the overall cost of the telephone package or bundle
2. Yes – I think about the line rental and calls separately
3. I don't think about costs at all

Q510

Does your fixed line home phone supplier include free phone calls and/or reduced call costs as part of the package?

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

Q520**[IF Q100. BROADBAND]**

You purchase both fixed line telephone and broadband services from a single supplier

[IF Q100. TV =TRUE]

You purchase both your fixed line telephone and TV services from a single supplier

[IF Q100. DIAL-UP =TRUE]

You purchase both your fixed line telephone and dial-up internet services from a single supplier

[IF Q100. MOBILE =TRUE]

You purchase both your fixed line telephone and mobile phone services from a single supplier

[IF Q100.TV+BROADBAND =TRUE]

You purchase fixed line telephone, broadband and TV services from a single supplier

[IF Q100.MOBILE+TV+BROADBAND =TRUE]

You purchase fixed line telephone, broadband and TV services from a single supplier

[IF Q100.MOBILE+TV =TRUE]

You purchase fixed line telephone, mobile phone and TV services from a single supplier

[IF Q100.MOBILE+TV+BROADBAND =TRUE]

You purchase fixed line telephone, mobile phone, broadband and TV services from a single supplier

[IF Q100.OTHER =TRUE]

You purchase fixed line telephone and other services from a single supplier

[IF Q100.NONE]

How much is the base cost of your package per **bill** (i.e. the recurring cost of your package before taking into account the cost of any additional calls or other services which are not included in your base price)?

[ELSE]

How much is the base cost of your bundle per **bill** (including all options that you chose to pay as part of the bundle)?

1. €____ [CAPTURE]
2. Don't know

Q530

Approximately how much would your total **bill** typically be (for example, the base price of the package plus the cost of additional calls or services purchased outside of your base package)?

1. €____ [CAPTURE]
2. Don't know

[IF Q530=2]

Q540

Approximately how much would your total **bill** typically be (for example, the base cost of the package plus the cost of additional calls or services purchased outside of your base package)?

1. Up to €20
2. Between €21 and €30.
3. Between €31 and €40
4. Between €41 and €50.
5. Between €51 and €60
6. Between €71 and €80
7. Between €81 and €90
8. Between €91 and €100
9. Between €101 and €121
10. Between €121 and €140
11. Between €141 and €160
12. Between €161 and €200
13. Between €201 and €240
14. Between €241 and €280
15. More than €280
16. Don't know

[PHONE CALL INCLUSIONS IN PLAN/BUNDLE]

[IF Q510=1]

Q600

Does your package include free calls or discounted call costs from your fixed line phone to local fixed line phones?

1. Yes, unlimited
2. Yes, limited number of minutes
3. No free or discounted local calls are included

4. Don't know

[IF Q600=2]

Q605

How many minutes per month can be used within your package to make calls from your fixed line phone to other local fixed phone numbers at no extra cost?

1. Up to 30 minutes
2. Between 31 and 60 minutes.
3. Between 61 and 100 minutes
4. Between 101 and 200 minutes
5. Between 201 and 300 minutes
6. More than 300 minutes
7. Unlimited
8. Don't know

[IF Q600>1 OR Q510>1]

Q610

Could you state whether you know the cost of making calls from your fixed line phone to other local fixed line phones in instances where you need to pay for the call?

1. Know the exact cost of calls to fixed line phones
2. Know the approximate cost of calls to fixed line phones
3. Don't know or not sure of the cost of calls to fixed line phones
4. Other

[IF Q510=1]

Q612

Does your package include free calls or discounted call costs from your fixed line phone to national fixed line phones?

1. Yes, unlimited
2. Yes, limited number of minutes
3. No free or discounted national calls are included
4. Don't know

[IF Q612=2]

Q614

How many minutes per month can be used within your package to make calls from your fixed line phone to other national fixed phone numbers at no extra cost?

1. Up to 30 minutes
2. Between 31 and 60 minutes.
3. Between 61 and 100 minutes
4. Between 101 and 200 minutes
5. Between 201 and 300 minutes
6. More than 300 minutes
7. Unlimited
8. Don't know

[IF Q612>1 OR Q510>1]

Q620

Could you state whether you know the cost of making calls from your fixed line phone to national fixed line phones in instances where you need to pay for the call?

1. Know the exact cost of calls to fixed line phones
2. Know the approximate cost of calls to fixed line phones
3. Don't know or not sure of the cost of calls to fixed line phones
4. Other

[IF Q510=1]

Q650

Does your package include free call minutes or discounted call costs to mobile phone numbers?

1. Yes, to any mobile network
2. Yes, to only some mobile networks
3. No free or discounted call minutes are included
4. Don't know

[IF Q650=1, 2]

Q655

How many minutes per month can be used within your package to make calls to mobiles at no extra cost?

1. Up to 30 minutes
2. Between 31 and 60 minutes.
3. Between 61 and 100 minutes
4. Between 101 and 200 minutes
5. Between 201 and 300 minutes
6. More than 300 minutes
7. Unlimited
8. Don't know

Q660

Could you state whether you know the cost of making calls from your fixed line phone to mobile phones (outside of any free minutes included in the package)?

1. Know the exact cost of calls to all mobile phone networks
2. Know the approximate cost of calls to all mobile phone networks
3. Know the exact cost of calls to some mobile networks only
4. Know the approximate cost of calls to some mobile networks only
5. Don't know or not sure of the cost of calls to mobile phone numbers
6. Don't make this type of calls

Q690**RANDOMISE ORDER**

Thinking about the cost of making different types of calls from your home, could you tell me which type of phone – fixed line phone in your home or mobile phone – is most expensive for making each of the following call types?

If you are not sure, please could you tell us your impression of the costs?

Type of call	Calling from a fixed line phone in your home is more expensive than calling from a mobile phone	Calling from a mobile phone is more expensive than calling from a fixed phone	Same cost	Don't know (INTERVIEWER NOTE: DON'T PROMPT)
For calls to local fixed line phones				
For calls to national fixed line phones				
For calls to mobile phones on the same network as your mobile phone				
For calls to mobile phones on a different network to your mobile phone				
For calls to international				

numbers				
For calls to premium rate numbers such as competition lines, voting lines, quiz shows, tarot, horoscope (15xx)				
For calls to directory enquires				
For calls to 1800 numbers				
For calls to (callsave) 1850 or (lo-call) 1890 numbers				

SWITCHING AND STICKING

[IF NOPHONE=TRUE GOTO NEXT SECTION]

Q1020

Have you switched fixed line service supplier?

1. Yes – within the last twelve months
2. Yes – between one and three years ago
3. Yes – more than three years ago
4. Never switched

[IF Q1020 = 1-2]

Q1030

Which fixed line service supplier were you previously with?

1. Eircom
2. UPC or ntl or Chorus
3. Vodafone at home
4. Imagine or Access Telecom
5. Digiweb
6. Magnet

7. IFA Telecom
8. Airspeed
9. Blueface
10. Fastcom
11. Greencom
12. Hive Telecom
13. Pure Telecom
14. UTV Interactive
15. Ripplecom (also called Amocom, Last Mile)
16. Satellite Broadband
17. Talk Talk
18. Other _____ [CAPTURE]

[IF Q1030=6,15,5,4]

Q1032

When you were with your previous service supplier, did you have a fixed wireless line where the wire connects to an antenna on the roof or inside the home?

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

[IF Q1020 = 1-2]

Q1040

Thinking about when you chose your current fixed line phone service supplier, please select the top three reasons out of the following set of possible reasons which were most **important** to your decision to choose your fixed line phone service supplier. Note that all of the reasons may be relevant to your particular service supplier

[RANDOMISE SEQUENCE OF QUESTIONS]

1. Cost of the line rental
2. Cost of making calls
3. Cost of incoming calls [i.e. costs others face when others call you]

[IF Q100.NONE=FALSE]

4. Better value in the bundle price offered

[IF Q100.NONE=TRUE]

5. Better value in the package offered

[IF Q100.NONE=FALSE]

6. Easier to have a single supplier for both or all three services

[IF Q100.NONE=FALSE]

7. Wanted to switch to a bundle including more services
8. Wanted to switch to a bundle with fewer services
9. The level of customer service offered by the operator
10. The reliability of the phone service (for example fewer dropped calls)
11. The quality of the line during a call (for example how clear the other person's voice is)
12. Faster broadband with current fixed line supplier

13. Trusted brand of fixed line service supplier
14. Availability of other voice services _____ [CAPTURE FOR EXAMPLE CALL FORWARDING, CALL WAITING, THREE-WAY CALLING, RINGBACK, ALARM CALL, CALLER LINE RESTRICTION AND CALLER DISPLAY]
15. Other _____ [CAPTURE]

[IF Q1040= 2]

Q1045

You mentioned that the cost of calls was an important reason for switching supplier. Please select the type of call which was of particular importance from the following list.

1. Cost of calls to the fixed line phones
2. Cost of calls to the mobile phones
3. Cost of calls to premium numbers such as competition, voting, tarot, or horoscope lines (typically beginning with 15xx)
4. Cost of calls to callsave (1850) or lo-call (1890) numbers
5. Cost of international calls
6. Cost of calls to directory enquiry services
7. No particular type of call

[IF Q1020 = 1-2]

Q1050

Out of those three you have selected which was the most important reason to your decision to choose your fixed line phone supplier?

1. _____[CAPTURE NUMBER OF REASON SELECTED]
2. No one reason more important than others

Q1500

Thinking of the following reasons why you may still have a fixed line phone in your home, please rate the following potential reasons on a scale of 1 to 5 where 5 is most like your reason for keeping a fixed line phone in your home and 1 is least like the reason for keeping a fixed line phone in your home.

1. The use of a phone in cases of emergency
2. Because I need a broadband connection and the phone line is linked to it
3. The phone is linked to my burglar alarm
4. I need to have a fixed line phone at home for work reasons
5. I prefer to use my fixed line phone rather than my mobile phone when making longer calls
6. It is cheaper for making some types of calls
7. I have always had one and don't see a reason to not have one now
8. There is poor mobile phone coverage in my home – so I need a fixed line phone
9. The quality of the line during a phone call

10. Because I receive a social welfare allowance for my fixed line.

-[IF Q480>2] (Multiple occupancy)

11. It is cheaper for our household to use a single fixed line phone than multiple mobile phones

Q1520

OPEN

Are there any other reasons why you may still have a fixed line phone in your home?

FIXED LINE USAGE PATTERNS AND AWARENESS

[IF Q10 =2 (NO HOME PHONE) GOTO Q3040]

Q3000

Thinking about the categories of calls you make **from your home**, please select what you would primarily use for each of the following types of calls. If there are several options which you would primarily use, please select multiple options

Type of call	Fixed line phone in your home	Mobile phone	[IF BROADBAND] Skype, Internet calls or VoIP e.g. from a computer, laptop, tablet, or mobile smart phone?
Calls to local fixed line phones			
Calls to national fixed line phones			
Calls to mobile phones on the same network as your mobile phone			
Calls to mobile phones on a different network to your mobile phone			
Calls to international			

numbers			
Calls to premium rate numbers such as competition lines, quiz shows, horoscope, etc			
Calls to directory enquires			
Calls to 1800 numbers			
Calls to (callsave) 1850 or (lo-call) 1890 numbers			

[ENTER TYPE OF PHONE PREFERRED FOR EACH CATEGORY OF CALL – ENTER ACROSS MULTIPLE IF MULTIPLE PREFERRED/NO PREFERENCE]

Q3040

Thinking about the quality of calls (how clear the person is that you are speaking to, if the call is dropped in the middle or not, how often you can get through, or any temporary interruptions to the call), rate your perception of how good the quality of call is on each of the following (if you don't have direct experience – rate it on your perception of what the call quality would be like). Please use a scale of 1 to 5 where 5 is very good and 1 is very poor or 6 is you have no opinion

Type of call	[IFQ120 NOT 9 (i.e. BlueFace)] Fixed line phone in your home using a standard phone	[IFQ120=9 (i.e. BlueFace)] Fixed line phone in your home using a standard phone	Fixed line phone in your home using a cable TV connection	Mobile phone	Fixed line phone using a 'fixed line wireless connection'	[IF BROADBAND] Skype, Internet calls or VoIP e.g. from a computer, laptop, tablet, or mobile smart phone?
Quality of call						
Reliability of connection						

Q3050

Thinking about the calls you make and receive on your fixed line phone, which of the following best describes your usage in a typical month

1. I usually make more calls than I receive
2. I usually make and receive a similar number of calls
3. I usually receive more calls than I would make
4. Don't know

Q3510

When you are calling from your fixed line phone to another fixed line phone, do you know the identity of the supplier that provides the phone that you are calling? (For example, if you would be aware if the number you were calling was provided by **[INSERT RANDOM SUPPLIER NOT OWN IDENTIFIED]**)

1. Never aware
2. Occasionally aware
3. Aware half the time*
4. Often aware
5. Always aware

Q3515

If someone is calling you on your fixed line phone from another fixed line or mobile phone, to what extent do you know what fixed line or mobile network they are calling from?

1. Never aware
2. Occasionally aware
3. Aware half the time*
4. Often aware
5. Always aware

Q3520

When you see an incoming call on the fixed line phone in your home, does awareness of the cost of the call to the person calling you cause you to change how you treat the calls?

1. Never
2. Occasionally - less than a quarter of the time
3. Approximately a quarter of the time
4. Approximately half the time
5. Often - Around three quarters of the time
6. Almost always or always

[IF Q3520 >1]

Q3530

Do you take any of the following actions?

	Almost always or always	Often - Around three quarters of the time	Approximately half the time	Approximately a quarter of the time	Occasionally - less than a quarter of the time	Never
Don't answer the call at all						
Don't answer their call but phone them back from your fixed line phone						
Don't answer their call but phone them back from your mobile phone						
Don't answer their call but use some other method to contact them such as email, skype or a text message						
Answer their call but shorten the length of the call						

REASONS FOR NO LONGER HAVING A FIXED LINE

[IF NOPHONE=FALSE GOTO Q12000]

Q4000

Did you previously have a fixed line phone in your current home?

1. Yes
2. No

[IF Q4000 = 1]

Q4010

How long ago did you stop having a fixed line phone in your home?

1. Within the last twelve months
2. Between one and three years ago
3. More than three years ago

Q4020

OPEN

Why don't you have a fixed line phone in your home?

[CAPTURE VERBATIMS AND PRECODE]

Q4030

OPEN

[IF Q4000=1]

For each of the following possible reasons for why you decided to no longer have a fixed line phone in your home,

[IF Q4000=2]

For each of the following possible reasons for why you decided not to have a fixed line phone in your home,

please state of on a scale of 1 to 5 where 1 is least like your reason and 5 is most like your reason (or 6 is not applicable)

[IF Q4000=2]

1. There was no phone installed when I moved into my home
2. I wanted to reduce my household bills

[IF Q4000=1]

3. We weren't using the phone enough to justify the cost

[IF Q4000=2]

4. We wouldn't use the phone enough to justify the cost
5. I use my mobile phone and don't need a fixed line phone
6. I use Skype, internet calls or VoIP instead from a computer, laptop, tablet, or mobile smart phone

7. I use email or use the internet for social networking messaging (such as Facebook) or instant messaging instead
8. [IF Q4000=1]The people I live with were not paying their fair share of the bill
9. I prefer to prepay for services whenever I can – but can't do that with a fixed line phone
10. The line rental charge is too high
11. The cost of calls is too high

[IF Q4000=2]

12. The installation charge is too high
13. I move home a lot

[IF Q4000=1]

14. I am no longer taking a bundle of services

[IF Q4000=1]

15. I can't get a fixed line phone installed in my home

[INTERVIEWER NOTE: 15 IS RELEVANT IF THE RESPONDENT LIVES IN RURAL AREA]**Q4040**

Would you consider getting a fixed line in the next three years? Using a scale of 1 to 5 where 1 is definitely would not plan to and 5 is definitely would plan to.

1. Definitely would not plan to
2. Probably would not plan to
3. Have not considered it
4. Probably would plan to
5. Definitely would plan to

Q4060**MULTIPLE**

There are a number of different ways that fixed line phones can be provided. For instance over TV cable or through a wireless antenna.

Which of the following are available in your area?

1. Cable TV
2. Fixed Wireless access [e.g. where an antenna is attached to the building]
3. Traditional fixed line connection [includes a copper or fibre connection]
4. Other _____[CAPTURE]

[GOTO Q20000]

CONSUMER RESPONSE TO HYPOTHETICAL RETAIL PRICE INCREASES

I now want to ask you some questions about possible changes in the costs of your home phone service and how you might react to these price changes. These are not necessarily changes that are planned by your, or any other, fixed line phone supplier - however we are interested in your reactions to them if they were to be hypothetically implemented. Before I proceed with those questions, I would just like to clarify:

Q12000**MULTIPLE**

You have said that you have a ... [reference Q70 response] connection in your home. There are a number of different ways that fixed line phones can be provided. For instance over TV cable or through a wireless antenna.

Which of the following are available in your area?

5. Cable TV
6. Fixed Wireless access [e.g. where an antenna is attached to the building]
7. Traditional fixed line connection [includes a copper or fibre connection]
8. Other _____[CAPTURE]

[If Q508=2]**Q13000**

Imagine if your fixed line supplier increased the cost of your line rental by 10%. Assume that only the price of your phone line rental would be affected – costs of calls and other services within the package or bundle would not change.

As a consequence of this increase in the cost of your line rental, do you believe that you would change your behaviour (including cancelling your subscription and switching to an alternative network operator)?

1. Yes – definitely would change behaviour
2. Yes – maybe change behaviour
3. No

[IF Q13000=1,2]

Q13010

In what ways would you change your behavior?

1. I would do nothing
2. I would cancel my subscription with my fixed line supplier
3. I would keep my subscription but make fewer calls on my home phone
4. I would stay with my current fixed line supplier but switch to a cheaper package or a bundle of telecommunication services
5. I would do something else _____[CAPTURE]

[IF Q13010=2]

Q13020

You have just said that you would cancel your fixed subscription, what would you be most likely to do instead?

1. Give up my fixed line connection and use my mobile phone instead
2. Give up my fixed line connection and instead use my mobile phone for calls and a mobile broadband/data card/dongle for internet access
3. Switch to a fixed line phone provided by a TV cable supplier
4. Switch to a fixed line phone provided by wireless network supplier (where the line is connected to an antenna which is attached to the building)
5. Switch to a traditional fixed line phone supplier
6. Switch to another fixed line phone supplier – and I don't mind which type
7. Other, please specify

[IF Q13010>2]

Q13030**MULTIPLE**

Which of the following would you do instead when you need to communicate with other people while at home? Select all that apply.

1. I would make more calls on my mobile
2. I would send more texts on my mobile
3. I would use my mobile phone more for both calls and texts
4. I would use email or use the internet for social networking messaging (such as Facebook) or instant messaging instead
5. I would use Skype, internet calls or VoIP from a computer, tablet, or mobile smart phone instead I would send an email or a (call-me) text message asking the recipient to phone me instead
6. I would make fewer/shorter calls on my fixed line and not replace them with other forms of communication
7. I would make more calls from a fixed line in work instead
8. I would make no changes
9. Other _____ [CAPTURE]

[FOR EACH STATEMENT SELECTED IN Q13030 EXCEPT 8]

Q13040

How often would you [INSERT EACH STATEMENT SELECTED IN ABOVE QUESTION, STATEMENTS A TO h]

1. Never
2. Occasionally - less than a quarter of the time
3. Approximately a quarter of the time
4. Approximately half the time
5. Often - Around three quarters of the time
6. Almost always or always

[If Q508=2 (the respondent thinks of the cost of line rental separately from that of calls)]

Q14000

What is your average bill for calls made from your fixed line telephone?

1. €____ [CAPTURE]
2. Don't know

[IF Q14000=2]

Q14005

Approximately, what is your average bill for calls made from your fixed line telephone?

1. €0 to €10
2. €10 to €20
3. €20 to €30
4. €30 to €40
5. €40 to €50
6. More than €50

[IF Q508=2 (the respondent thinks of the cost of line rental separately from that of calls)]

Q14010

Imagine if your fixed line supplier increased the cost of your home phone calls by 10% (i.e. by **VALUE**). Assume only the price of your calls would be affected – costs of line rental and other services within the package bundle would not change.

As a consequence of this **VALUE** increase in the cost of your calls, do you believe that you would change your behaviour (including potentially cancelling your subscription and switching to an alternative network operator)?

1. YES – definitely would change behaviour
2. Yes – maybe change behaviour
3. NO

[IF Q14020=1,2]

Q14030

Which of the following would describe what you would be most likely to do?

1. I would do nothing [THIS ALLOWS RESPONDENTS TO ADMIT THAT THEY WOULDN'T ACT]
2. I would cancel my subscription with my fixed supplier
3. I would switch to a different fixed calls supplier but stay with my current fixed line rental supplier
4. I would keep my subscription but make fewer calls on my home phone
5. I would stay with my current supplier but reduce spending on calls within my package or bundle of services
6. I would stay with my current fixed line supplier but switch to a cheaper package or bundle
7. I would do something else _____[CAPTURE]

[IF Q14030 = 2 OR 3]

Q14040

You have just said that you would cancel your subscription, what would you do instead?

1. Give up my fixed line connection and use my mobile phone instead
2. Give up my fixed line connection and instead use my mobile phone for calls and a mobile broadband/data/dongle card for internet access
3. Switch to a fixed line phone provided by a TV cable supplier
4. Switch to a fixed line phone provided by wireless network supplier (where the line is connected to an antenna which is attached to the building)
5. Switch to a traditional fixed line phone supplier
6. Switch to another fixed line phone supplier – and I don't mind which type
7. I would do something else _____[CAPTURE]

[IF Q14030>3]

Q14050**MULTIPLE**

Which of the following would you do instead when you need to communicate with other people while at home? Select all that apply.

1. I would make more calls on my mobile
2. I would send more texts on my mobile
3. I would use my mobile phone more for both calls and texts
4. I would use email or use the internet for social networking messaging (such as Facebook) or instant messaging instead
5. I would use Skype, internet calls or VoIP from a computer, tablet, or mobile smart phone instead
6. I would send an email or a (call-me) text message asking the recipient to phone me instead
7. I would make fewer/shorter calls on my fixed line and not replace them with other forms of communication
8. I would make more calls from a fixed line in work instead
9. I would make no changes
10. I would do something else _____[CAPTURE]

[FOR EACH STATEMENT SELECTED IN Q14050 EXCEPT 9]

Q14060

How often would you [INSERT EACH STATEMENT SELECTED IN ABOVE QUESTION, STATEMENTS A TO h]

1. Never
2. Occasionally - less than a quarter of the time
3. Approximately a quarter of the time
4. Approximately half the time
5. Often - Around three quarters of the time
6. Almost always or always

[IF Q508=1, 3 (the respondent thinks of the total cost of bill – line rental, calls and other services included within a package or bundle together) AND Q100.NONE (VOICE ONLY –NO BUNDLE)]

Q15000

You mentioned earlier that you purchase a fixed line phone as well as calls from your fixed line supplier. Imagine if your fixed line supplier increased the total cost of your bill by 10% (i.e. by **VALUE**).

As a consequence of this **VALUE** increase in the total cost of your bill, do you believe that you would change your behaviour (including potentially switching to an alternative supplier)?

1. YES – definitely would change behaviour
2. Yes – maybe change behaviour

3. NO

[IF Q15000= 1, 2]

Q15010

Which of the following would describe what you would be most likely to do?

1. I would do nothing [THIS ALLOWS RESPONDENTS TO ADMIT THAT THEY WOULDN'T ACT]
2. I would cancel my subscription with my fixed supplier
3. I would keep my subscription but make fewer calls on my home phone
4. I would stay with my current fixed line supplier but switch to a cheaper calls package
5. I would do something else _____[CAPTURE]

[IF Q15010=2]

Q15015

You have just said that you would cancel your subscription, what would you do instead?

1. I would give up my fixed line connection and use my mobile phone instead
2. Switch to a fixed line phone provided by a TV cable supplier
3. Switch to a fixed line phone provided by wireless network supplier (where the line is connected to an antenna which is attached to the building)
4. Switch to a traditional fixed line phone supplier
5. Switch to another fixed line phone supplier – and I don't mind which type
- a) I would do something else _____[CAPTURE]

[IF Q15010=3,4]

Q15020

MULTIPLE

Which of the following would you do instead when you need to communicate with other people while at home? Select all that apply.

1. I would make more calls on my mobile
2. I would send more texts on my mobile
3. I would use my mobile phone more for both calls and texts
4. I would use email or use the internet for social networking messaging (such as Facebook) or instant messaging instead
5. I would use Skype, internet calls or VoIP from a computer, tablet, or mobile smart phone instead
6. I would send an email or a (call-me) text message asking the recipient to phone me instead
7. I would make fewer/shorter calls on my fixed line and not replace them with other forms of communication
8. I would make more calls from a fixed line in work instead
9. I would make no changes
10. I would do something else _____[CAPTURE]
- 11.

[FOR EACH Q15020 SELECTED APART FROM 9]**Q15030**

How often would you [INSERT EACH STATEMENT SELECTED IN ABOVE Q, STATEMENTS A TO I]

1. Never
2. Occasionally - less than a quarter of the time
3. Approximately a quarter of the time
4. Approximately half the time
5. Often - Around three quarters of the time
6. Almost always or always

[IF Q100 ANY BUNDLE AND Q508=1, 3]**Q16000**

You mentioned earlier that you purchase a fixed line phone as well as other services as a bundle from your fixed line supplier. Imagine if your fixed line supplier increased the cost of your bundle by 10% (i.e. by **VALUE**).

As a consequence of this **VALUE** increase in the cost of your bundle, do you believe that you would change your behaviour?

1. YES – definitely would change behaviour
2. Yes – maybe change behaviour
3. NO

[IF Q16000=1, 2]**Q16010**

Which of the following would describe what you would be most likely to do?

1. I would do nothing [THIS ALLOWS RESPONDENTS TO ADMIT THAT THEY WOULDN'T ACT]
2. I would cancel my subscription with my fixed supplier
3. I would keep my current supplier but downgrade to a cheaper bundle
4. I would do something else _____[CAPTURE]

[IF Q16010=2]

Q16020

You have just said that you would cancel your subscription, what would you be likely to do instead?

1. Switch to a fixed line phone provided by a TV cable supplier
2. Switch to a fixed line phone provided by wireless network supplier (where the line is connected to an antenna)
3. Switch to a traditional fixed line phone supplier
4. Switch to another fixed line phone supplier – and I don't mind which type
- 5.
6. Give up my fixed line connection and use my mobile phone instead
7. Give up my fixed line connection and instead use my mobile phone for calls and a mobile broadband/data card for internet
8. I would do something else _____[CAPTURE]

[If Q16020=1,2,4]

Q16025

You have just said that you would switch to an alternative fixed line phone supplier. If you were to do so, would you be likely to:

1. Purchase a similar bundle to the one I am currently purchasing
2. Purchase a broadband-only product and use my mobile phone for calls
3. Purchase a narrower bundle of services to those that I am currently purchasing, but would still include a fixed line phone service
4. Purchase a fixed line phone service, but would no longer bundle it with other services.
5. I would do something else _____[CAPTURE]

[IF Q16010=3]

Q16030

How would you change how you purchase the services from your current supplier?

1. I would downgrade to a cheaper bundle that still includes a fixed line phone service
2. I would downgrade to a basic fixed line phone service (cancelling the additional bundled services i.e. pay TV and broadband)
3. I would downgrade to a basic fixed line phone service and then purchase the previously bundled services (i.e. pay TV and broadband) from an different supplier
4. I would keep my internet service but drop the call service (no longer make calls)
5. I would keep my current bundle and reduce my out of bundle' spending on calls to bring the total bill down closer to the base bundle cost
6. I would do something else _____[CAPTURE]

[IF Q16030=4 or 5]

Q16040

Which of the following would you do instead when you need to communicate with other people while at home?

1. I would make more calls on my mobile
2. I would send more texts on my mobile
3. I would use my mobile phone more for both calls and texts
4. I would use email or use the internet for social networking messaging (such as Facebook) or instant messaging instead
5. I would use Skype, internet calls or VoIP from a computer, laptop, tablet, or mobile smart phone instead
6. I would send an email or a (call me) text message asking the recipient to phone me instead
7. I would make fewer/shorter calls on my fixed line and not replace them with other forms of communication
8. I would make more calls from a fixed telephone line in work instead
9. I would make no changes
10. I would do something else _____[CAPTURE]

[FOR EACH Q16040 SELECTED APART FROM 9]

Q16050

How often would you [INSERT EACH STATEMENT SELECTED IN ABOVE QUESTION, STATEMENTS A TO I]

7. Never
8. Occasionally - less than a quarter of the time
9. Approximately a quarter of the time
10. Approximately half the time
11. Often - Around three quarters of the time
12. Almost always or always

CONCLUSION OF INTERVIEW

Appendix: 2 ComReg Fixed Line Business Consumer Survey

BACKGROUND AND DEMOGRAPHIC QUESTIONS

Good morning/afternoon. I'm _____ from Millward Brown, an independent research company. We're conducting a survey on behalf of the Commission for Communications Regulation about your use of fixed line phone and mobile services.

Everything you say to me will be treated in strict confidence; information will be aggregated and will be used for statistical purposes only.

Q20

Are you the person in your organisation who is responsible or jointly responsible for selecting your current fixed line phone service provider or mobile phone provider [if your business does not have a fixed line phone] and for deciding and managing policies around switching communications service providers?

1 Yes

2 No - INT - ASK TO SPEAK WITH THE PERSON RESPONSIBLE AND RESTART WHEN

SPEAKING WITH THAT PERSON.

INTERVIEW NOTE: FOR PUBLIC SECTOR ORGANISATIONS (I.E. GOVERNMENT, EDUCATION, HEALTH) CAPTURE THE ORGANISATION THE DECISION MAKER WORKS FOR WHEN PASSED ONTO ANOTHER INDIVIDUAL

Q21

Are you responsible for decision-making on telecommunication services at some or all of the sites your business has?

PROBE TO CODE: SINGLE CODE BUT CAN MULTICODE 3+4

1. Yes – solely responsible for all sites
2. Yes – jointly responsible for all sites
3. Yes – solely responsible for some sites, but not all
4. Yes – jointly responsible for some sites, but not all

[IF Q21=2, 4]

Q22

You mentioned that you are jointly responsible for telecoms decision-making including fixed calls and access. What role do you play when choosing a telecoms provider or telecoms services? PROBE FULLY. CODE ALL THAT APPLY

1. Choose suppliers
2. Contract negotiations
3. Financials
4. Technical /specialist advice
5. Final approval
6. Shortlisting / Initial contact
7. Other (_____Specify)

Q25

Does your business have a fixed line phone connection?

INTERVIEWER PROMPT WITH: This includes corded and cordless handsets and is any phone line with a number starting with an area code – such as 01 for Dublin or 021 for Cork – or any low call number or a phone number starting with 076 as distinct from mobile numbers which all start with 08-something. It could also include using a phone line that is used for internet or broadband only.)

3. Yes [INTERVIEW NOTE: THIS IS AN ACTIVE CONNECTION – NOT JUST A WIRE TO THE BUSINESS PREMISES]
4. No

Q27

In your business, do you have more than 1 fixed line phone connection?

3. No
4. Yes ____ [CAPTURE NUMBER]

[Interviewer note: by this we mean the number of physical lines into the organization, not the number of extensions you have. Please include any phone lines you have dedicated to a fax machine]

[IF Q27>1]

Q29**OPEN**

Why do you have more than 1 fixed line phone connection?

Q30

What is the nature of your organisation's business? Please describe briefly INT-RECORD FULLY

INT: Code organisation's business as appropriate to the following

- | | |
|----|--|
| 1 | Agriculture, forestry and fishing |
| 2 | Industry Mining and quarrying, Manufacturing, Electricity, gas, steam and air conditioning supply, Water supply, sewerage, waste management and remediation activities |
| 3 | Construction |
| 4 | Wholesale and retail trade; repair of motor vehicles and motorcycles |
| 5 | Business and Professional Services Information and communication Financial and insurance activities Real estate activities Professional, scientific and technical activities Administrative and support service activities |
| 6 | Public administration and defence; compulsory social security |
| 7 | Education |
| 8 | Human health and social work activities |
| 9 | Other Transportation and storage Accommodation and food service activities Leisure hotels Arts, entertainment and recreation, |
| 10 | Other service activities: Activities of households as employers; undifferentiated goods- and services producing activities of households for own use |
| 11 | Activities of extra-territorial organisations and bodies |

Q40**OPEN**

How many employees are there in your business? If you are not responsible for the entire organisation's communications services, please answer for the part of the organisation for which you have responsibility for communications services.

[INT - CATEGORISE NUMBER OF EMPS]

- | | |
|----|---------------------------|
| 1 | Sole trader/Self employed |
| 2 | 1 - 5 employees |
| 3 | 6 - 9 employees |
| 4 | 10 - 24 employees |
| 5 | 25 - 49 employees |
| 6 | 50 - 99 employees |
| 7 | 100 -149 employees |
| 7 | 150 – 199 employees |
| 8 | 200 – 249 employees |
| 9 | 250- 499 employees |
| 10 | 500 - 1000 employees |
| 11 | 1001 or more employees |
| 12 | Don't know |

Q45

How many premises does your business have in Ireland (not including any in Northern Ireland)?

___ [CAPTURE]

[If Q45>1]

Q48 Are decisions around communication services (such as the selection of suppliers) made separately for different premises in Ireland or across all of the premises in Ireland as a single unit?

1. Made separately for each premises
2. Made collectively across all premises'
3. Made for groups or clusters of premises'

[NOTE: RESPONDENTS CAN SELECT MULTIPLE IN THE NEXT QUESTION]

Q49

If Q48 =1,3

For how many premises in Ireland do you have responsibility for communications services, including for deciding and managing policies around switching communications service providers?

Q50**MULTIPLE**

Which best describes the business premises for which you are responsible for selecting communication services?

[IF Q40<4 (i.e. small business – ask home office question as well)]

1. Home office – sharing communications services (such as fixed line phone) within the home
2. Office in a building with shared communication infrastructures between independent organisations housed within the same building
3. Stand alone office in business park
4. Other stand alone office
5. Manufacturing or warehouse premises
6. Public building (such as education, health or government premises where members of the public have access)

Q51**MULTIPLE**

And which county or city council area is the main business site/office for which you are responsible for selecting communications services located in?

[INTERVIEWER: INSERT COUNTY CODE FROM LIST INCLUDING 3 DUBLIN CITY AREAS: CORPORATION, RATHDOWN/DUN LAOGHAIRE, FINGAL]

Q52**OPEN AND CODE**

And approximately how much would the total annual business spend on telecommunications services be – such as fixed line and mobile phones, internet access and other related services – for the part of the business/organisation over which you are responsible for selecting suppliers?

€_____

Q55**OPEN AND CODE**

What approximately was the previous year's annual turnover/or budget (if non-commercial organisation) for the part of the business/organisation over which you are responsible for selecting telecommunications suppliers? I should also stress that the information you provide will be treated in confidence by my research company and won't be provided in any form that will identify your business.

€_____

[IF Q25=2 GOTO Q130]

(have fixed line phone)

Q70

Please identify the communications services purchased and being used by your business (vertical axis), and in each case please indicate the technology over which these services are delivered to your business premises (horizontal axis)

[NOTE: THIS WILL BE CONVERTED INTO THREE MULTIPLE SELECTION QUESTIONS]

	Traditional phone line (PSTN)	ISDN	DSL	Cable	Mobile	Fibre to the premises	Leased Line or Private wire - connecting your offices /sites or branches for private data/voice traffic between your sites	VPN e.g. Eircom BIP (Business IP Service), BT (MPLS, IP Connect, Etherflow services),	Other: please specify (e.g., FWA, satellite)
Voice - the traditional spoken phone calls (not incl. skype or other internet calls)	y/n	y/n	y/n	y/n	y/n	y/n	y/n	y/n	y/n
Dial up internet	y/n	y/n	N/a	N/a	N/a	N/a	N/a	N/a	N/a
Broadband/data	N/a	N/a	y/n (broadband over the traditional telephone line)	y/n	y/n	y/n	y/n	y/n	y/n

[Interviewer notes

1: Data can include internet usage and other (non-Internet) data-related activities such as data storage, shared business applications, etc.

2: VPNs (Virtual Private Networks) consist of private networks that may be based around one or more inter-linked "islands" connected together through leased lines or private wires connected to the specialized data service provided by your telecoms supplier. e.g. Examples of some specific product names are: Eircom BIP (Business IP Service), BT (MPLS, /IP Connect, /Etherflow services). Note. MPLS is Multi-protocol Label Switching

[IF Q70 =ISDN]**Q70A**

Which of the following best describes your ISDN line connection?

1. ISDN basic rate access (BRA) connection
2. ISDN fractional rate access (FRA)
3. ISDN premium rate access (PRA)

4. Other_____

5. Don't know

[IF Q70 =ISDN]

Q70B

OPEN

How many ISDN lines does your business have?

___ lines

[IF Q70 =ISDN]

Q70C

And how many channels are there across your main ISDN line?

[If above Q70= ANY VPN OPTION SELECTED]

Q71

You mention that your company is being provided with a VPN. VPNs can be delivered over a variety of business connectivity services. Do you know what the underlying access technology or infrastructure is used to provide your VPN?

1. DSL
2. Cable
3. Fibre to the premises
4. Fixed wireless access (FWA)
5. Leased line or private wire connected to telecoms data service
6. Other (please specify_____)
7. Don't know

INTERVIEWER NOTES IF QUERIED:

1. Leased lines refers to fixed, permanent telecommunications connections providing broadly symmetric capacity between two points
2. Fixed wireless access (FWA) uses fixed lines but the wire connects to an antenna which is attached to the building, e.g. on the roof

[If above Q70= ANY DATA OR INTERNET ACCESS OPTION SELECTED ASK THE FOLLOWING QUESTION]

Q72

What is the download speed available on your main/primary connection for each of the following
[INSERT SELECTED OPTIONS FROM Q70]

	DSL	Cable	Mobile	Fibre to the premises	Leased Line or private wire	Other: please specify (e.g., FWA, satellite)
Up to 2 Mb/s						
2 to 10 Mb/s						
10 to 34 Mb/s						
35 to 45 Mb/s						
155 Mb/s						
Above 155 Mb/s						

[If Q70 MORE THAN ONE SERVICE (VERTICAL AXIS) SELECTED]

Q72a

Does your business purchase fixed voice telephony (calls and line rental) as part of a bundle including other telecommunications services (e.g. broadband or mobile telephony) from the same supplier (i.e. a single price for several products)?

1. Yes
2. No

If Q72a = 1]

Q73

What other services are included in this bundle in addition to your fixed voice telephony service?

1. Data services (non-internet data services))
2. Dial-up internet access
3. Fixed broadband access
4. Mobile telephony
5. Mobile broadband (often using a USB modem or dongle).

6. TV
7. Other please, specify
8. Don't know

Q74

Who provides you with this bundle of services?

[INSERT LIST]

Q75

What additional or other communications services, if any, do you purchase that are not included in your fixed voice telephony bundle or package?

1. Fixed voice telephony - Line rental only
2. Fixed voice telephony - Calls
3. Fixed voice telephony - Both Line rental & Calls together
4. Data (non-internet data services)
5. Dial-up internet access - Traditional fixed phone line
6. Dial-up internet access - ISDN
7. Fixed broadband access - DSL
8. Fixed broadband access - Cable
9. Fixed broadband access - Fibre to the premises
10. Fixed broadband access - Other
11. Leased lines\Ethernet
12. Mobile telephony
13. Mobile broadband (using a USB modem or dongle)
14. TV
15. Other please, specify
16. Don't know

[IF Q75 IS ANY + VOICE – INCLUDE THOSE SERVICES ONLY]

Q76

OPEN (CODE TO LIST)

Please state the suppliers of each of these types of service that you currently use **[CAPTURE**

MULTIPLE SUPPLIERS]

1.Fixed voice telephony	Line rental = Calls = Both (line rental and calls supplied together) =
2.Dial up internet access	Traditional fixed phone line (PSTN) = ISDN =
3.Fixed broadband access/data services	DSL= Cable= Fibre to the premises= Other (please specify) =
4.Leased lines/Ethernet	
5.Mobile telephony	
6.Mobile broadband (using a USB modem or dongle)	
7.Other, (e.g. VPN) please specify	
8.Don't know	

[IF Q76.1> 1 supplier]

Q78

OPEN

And who is your main supplier of fixed line telephony?

[IF Q76.1+Q76.2+Q76.3+Q76.4 only 1 supplier]

Q80

OPEN CODE

You said you used only one supplier for your business fixed telecommunications services. Why does your company use only one supplier for your fixed telecommunications services?

PROBE FULLY CODE ALL THAT APPLY DO NOT READ OUT

1. Easier to manage one supplier
2. Negotiate better discounts/ best price
3. They understand our business
4. Provide good/reliable service
5. Offer more advanced/faster line speeds
6. Good relationships with them
7. Historic (Company always dealt with them)
8. Provide other telecoms services to us
9. Get a better service as a bundle

[IF Q76.1+Q76.2+Q76.3+Q76.4 more than 1 supplier]

Q85

OPEN CODE

Why does your company use more than one supplier for your fixed telecommunications services?

1. Tend to go with best price available at time
2. Tend to go with the best/most advanced service available at time
3. Use two suppliers for same requirement - prefer to use a mix in case one lets us down
4. Use different suppliers for different services
5. Different areas/ regions have different telecoms providers

6. Not one single provider is capable of meeting all our service requirements
7. Makes negotiations more competitive
8. No reason – just happened over the years
9. Other
10. Don't know

[IF MORE THAN ONE PRECODE Q85]

Q88

OPEN CODE

And what is the single most important reason for choosing more than one main supplier for fixed business line/ connection services?

[LIST SELECTED IN Q85]**[IF Q25=1]****Q90**

Does your business use a PBX to manage/aggregate calls?

- 1 Yes
- 2 No

[If Q90=1]

Is your PBX an internet protocol (IP) based service?

1. Yes
2. No
3. Don't know
4. Other please specify

Note: A private branch exchange (PBX) is a telephone exchange that serves a particular business or office and allows multiple employees to be connected to a single phone system. PBXs connect the internal telephones of a private organization—usually a business—and also connect them to the Public Switched Telephone Network (PSTN) via trunk lines. Because they incorporate telephones, fax machines, dial-up modems, and more, the general term "extension" is used to refer to any end point on the branch.

Q100

Does your business provide any low call numbers such as 1800, 1850, 1870 etc – for use by customers (or employees)?

1. Yes
2. No

INTERVIEWER: CODE TO LIST**[IF Q100=1]**

What proportion of the incoming calls to your business is on these low call numbers?

1. _____%
2. Don't know

[IF Q100=1]

Q103

What proportion of your total communications cost is related to these low call numbers?

1. _____%
2. Don't know
6. Don't know

Q120

What proportion of employees have a mobile phone number provided by the business (as distinct from claiming expenses based on the use of their own personal mobile phone for business purposes), a fixed line phone primarily for their use in the premises (as distinct from a phone shared between employees), both or neither?

1. Mobile phone only____%
2. Fixed line phone only__%
3. Both _____%
4. Neither____%

[IF Q120=1,3]

Q130

What businesses provide your business' mobile phone service?

[IF NOPHONE GOTO 350]

INTERVIEWER: CODE TO LIST

Q300

Thinking about the calls made from your business' fixed line phone in a typical month by all employees, please provide an approximate breakdown of the amount of time spent on your business' fixed line phone for each of the following?

[NOTE TO INTERVIEWER: ADD TO 100%]

6. To international phone numbers ___%
7. To local/national fixed line numbers ___%
8. To mobile phones ___%
9. To directory enquires and other premium rate numbers ___%
10. I Don't know
11. No fixed line phone calls made

Q350

Thinking about the calls made from your business' mobile phones in a typical month by all employees, please provide an approximate breakdown of the amount of time spent on your business' mobile phones when in the business premises for each of the following? (This includes only calls made from mobile phones when in the office)

[NOTE TO INTERVIEWER: ADD TO 100%]

6. To international phone numbers ___%
7. To local/national fixed line numbers ___%
8. To mobile phones ___%
9. To directory enquires and other premium rate numbers ___%
10. I Don't know
11. No mobile phone calls made

Q400

Thinking about the calls made using skype or other internet-based voice applications in a typical month by all employees; please provide an approximate breakdown of the amount of time spent on skype or other internet-based voice applications for each of the following?

[NOTE TO INTERVIEWER: ADD TO 100%]

1. To international phone numbers ___%
2. To local/national fixed line numbers ___%
3. To mobile phones ___%
4. To other Skype users ___%
5. To directory enquires and other premium rate numbers ___%
6. I Don't know
7. No skype calls made

[IF NOPHONE GOTO 4010]

BUSINESS PHONE: BUNDLES AND PRICE

[IF Q25=2 (NO FIXED_LINE PHONE)] GOTO NEXT SECTION

Q470

How often do you receive a bill from the main supplier of your fixed line phone supplier (this can be a printed bill or an online or email bill)?

4. Monthly
5. Every two months
6. Every three months
7. Less frequently

How much do you pay per bill for the line rental for (all lines/circuits used for calls)?

1. €____ [CAPTURE]
2. Don't know – line rental part of a package with calls [CAPTURE – DO NOT PROMPT]
3. Don't know

Q510

And what would your total bill typically be for your communications services from your main supplier of fixed line phone services

€____ [RECORD]

[IF ONE SUPPLIER FOR BOTH LINE AND CALLS]

Q520

Which best describes the service agreement between the supplier of your fixed line telephone service and your business. If you have more than one supplier, please consider your main supplier

1. A business contract /package with standard tariffs, terms and conditions
2. A business contract/package designed to suit the specific needs of my business with customised/bespoke tariffs, terms and conditions
3. A residential contract/package

[IF Q520=1,2]

Q550

As part of your main business' package for fixed line calls, are discounts related to a commitment for a minimum monthly spend?

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

[DISCOUNTED CALLS BASED ON THE PLAN OR DISCOUNTING OF CALLS BASED ON MINIMUM SPEND THRESHOLD]

[IF Q550=1 GOTO Q700]

Q600

Thinking about your main supplier of fixed line calls, does your package include free calls or discounted call costs from your business' fixed line phones to local fixed line phones?

5. Yes, unlimited
6. Yes, limited number of minutes
7. No free or discounted local calls are included
8. Don't know

[IF Q600=2]

Q605

How many minutes per billing period can be used within your package to make calls from your business' fixed line phone to other local fixed phone numbers at no extra cost?

9. Limited number(____minutes)
10. Unlimited
11. Don't know

[IF Q600>1]

Q610 [LOWER PRIORITY]

Could you state whether you know the cost of making calls from your business' fixed line phone to other local fixed line phones in instances where you need to pay for the call?

5. Know the exact cost of calls to fixed line phones
6. Know the approximate cost of calls to fixed line phones
7. Don't know or not sure of the cost of calls to fixed line phones
8. Other

Q612

Does your package include free calls or discounted call costs from your business' fixed line phones to national fixed line phones?

5. Yes, unlimited
6. Yes, limited number of minutes
7. No free or discounted national calls are included
8. Don't know

[IF Q612=2]

Q614

How many minutes per billing period can be used within your package to make calls from your business' fixed line phones to other national fixed phone numbers at no extra cost?

9. Limited number(____minutes)
10. Unlimited
11. Don't know

[IF Q600>1]

Q620 [LOWER PRIORITY]

Could you state whether you know the cost of making calls from your business' fixed line phones to national fixed line phones in instances where you need to pay for the call?

5. Know the exact cost of calls to fixed line phones
6. Know the approximate cost of calls to fixed line phones
7. Don't know or not sure of the cost of calls to fixed line phones
8. Other

Q650

Does your package include free call minutes or discounted call costs to mobile phone numbers?

5. Yes, to any mobile network
6. Yes, to only some mobile networks
7. No free or discounted call minutes are included
8. Don't know

[IF Q650=1, 2]

Q655

How many minutes per billing period can be used within your package to make calls to mobiles at no extra cost?

9. Limited number(____minutes)
10. Unlimited
11. Don't know

Q660 [LOWER PRIORITY]

Could you state whether you know the cost of making calls from your business' fixed line phone to mobile phones (outside of any free minutes included in the package)?

7. Know the exact cost of calls to all mobile phone networks
8. Know the approximate cost of calls to all mobile phone networks
9. Know the exact cost of calls to some mobile networks only
10. Know the approximate cost of calls to some mobile networks only
11. Don't know or not sure of the cost of calls to mobile phone numbers
12. Don't make this type of calls

GOTO Q730**Q700**

What is the minimum monthly spend that your business has committed to in order to avail of the discounts offered?

____euro

Q720**MULTIPLE**

Please select which of the following call types are available at a discounted rate if the minimum monthly spend is achieved:

1. Calls to local fixed line phone numbers
2. Calls to national fixed line phone numbers
3. Calls to mobile phone numbers
4. International calls
5. Calls to your low call numbers such as 1800, 1850 and 1870
6. Other please specify

Q730 [LOWER PRIORITY]

Could you state whether you know the cost of making calls from your business' fixed line phone to other local fixed line phones in instances where you need to pay for the call?

1. Know the exact cost of calls to fixed line phones
2. Know the approximate cost of calls to fixed line phones
3. Don't know or not sure of the cost of calls to fixed line phones
4. Other

Q740

Could you state whether you know the cost of making calls from your business' fixed line phones to national fixed line phones in instances where you need to pay for the call?

1. Know the exact cost of calls to fixed line phones

2. Know the approximate cost of calls to fixed line phones
3. Don't know or not sure of the cost of calls to fixed line phones
4. Other

Q760

Could you state whether you know the cost of making calls from your business' fixed line phone to mobile phones (outside of any free minutes included in the package)?

1. Know the exact cost of calls to all mobile phone networks
2. Know the approximate cost of calls to all mobile phone networks
3. Know the exact cost of calls to some mobile networks only
4. Know the approximate cost of calls to some mobile networks only
5. Don't know or not sure of the cost of calls to mobile phone numbers
6. Don't make this type of calls

Q770

When you are thinking about (and reviewing) the cost of the fixed business telecommunications services, do you think about the cost of calls and line rental/access separately?

4. No – we are more concerned with the overall cost of the fixed voice package
5. Yes – we think about the cost of calls and line rental/access separately
6. We don't think about costs at all

Q780

Thinking about your knowledge of the cost of calling particular types of numbers from your business fixed line phone, e.g. calling local/national numbers, mobile numbers, etc. do you think that

1. You are quite typical of the level of awareness of the employees using a business fixed line phone in your organisation
2. You are more aware than the average employee using a business fixed line phone
3. You are less aware than the average employee using a business fixed line phone
4. Don't know

POLICY AROUND PHONE USAGE**Q840**

Do you or does somebody else in your organisation check in detail the fixed phone bills that your business receives (either electronically or in the post)?

1. Yes - myself or another person
2. No

[IF Q840=1]

Q850

Which of the following are checked on each bill?

1. The total amount
2. If the amount is greater than the bundle price
3. The cost of calls to local or national phone numbers
4. The cost of calls to mobile phone numbers
5. The cost of premium rate numbers and calls to directory enquiries
6. The cost of international phone calls
7. The cost of the line/connection
8. None of these

Q860

Thinking about your business' approach to selecting a fixed line phone supplier, which of the following statements best captures its approach?

1. As part of a formal procurement process where potential suppliers are asked to submit written proposals in response to a request for tender or similar document and evaluated against set-out criteria
2. As part of semi-formal procurement process with potential suppliers asked to submit written proposals in response to a briefing
3. Informally – in response to an approach from a new supplier with an attractive offer or following research of available offers

SWITCHING AND STICKING**[IF NOPHONE=TRUE GOTO NEXT SECTION]****Q1000**

Has your business reviewed its telecommunications services provider arrangements within the last 3 years?

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

Q1020

Have you switched fixed line phone service supplier? (if you have more than one fixed line phone supplier, please consider if you have switched any supplier)

5. Yes – within the last twelve months
6. Yes – between one and three years ago
7. Yes – more than three years ago
8. Never switched

Q1025

What is the length of your current contract for the provision of your fixed line phone service?

1. ____ [CAPTURE IN YEARS]
2. Don't know

[IF Q1020 = 1-2]**Q1030**

Which fixed line phone service supplier were you previously with?

[CODE TO LIST]

Q1035

Did you purchase any other telecommunications services from this supplier?

Dial-up internet	Fixed broadband/data services	Mobile telephony	Mobile broadband (often using a USB modem or dongle)	Leased line/ethernet	Other [CAPTURE]

[IF Q1020>1]

Q710

MULTIPLE

[IF Q1020 = 1-2]

Q1040

Thinking about when you chose your current fixed line phone service supplier, please select the top three reasons out of the following set of possible reasons which were most **important** to your decision to choose your business' fixed line phone service supplier. Note that all of the reasons may be relevant to your particular service supplier

1. Cost of making calls
2. Cost of line rental
3. Cost faced by others such as customers when calling our business
4. Offered a better value bundle or package compared with alternative suppliers
5. Better customer service
6. Offered a better broadband product as part of a bundle with the fixed line phone
7. Trust in the brand/supplier
8. Other _____ [CAPTURE]

[IF Q1040= 1]

Q1042

You mentioned that the cost of making calls was an important reason for switching supplier. Please select the type of call which was of particular importance from the following list.

8. Cost of calls to fixed line phone numbers
9. Cost of calls to mobile phone numbers
10. Cost of calls to premium numbers (typically beginning with 15xx)
11. Cost of calls to callsave (1850) or lo-call (1890) numbers
12. Cost of international calls
13. Cost of calls to directory enquiry services
14. No particular type of call

[IF Q1040= 3]

Q1044

You mentioned that the cost of calls faced by others when calling your business was an important reason when choosing your supplier. Please select the type of call which was of particular importance from the following list.

1. Cost of calls incoming to fixed line phone numbers
2. Cost of calls incoming to mobile phone numbers
3. Cost of calls incoming to premium numbers (typically beginning with 15xx)
4. Cost of calls to incoming to callsave (1850) or lo-call (1890) numbers
5. No particular type of call

[IF Q1040= 3]

Q1046**MULTIPLE**

In respect of calls incoming to your business' fixed-line phones, has your business ever taken any of the following actions to reduce the costs that people face when calling the business?

Encouraged customers to phone a low call or cost save number in order to reduce the cost to them

Encouraged customers to send an email or text message instead of making a call to your business' fixed line phones

Switched to another fixed operator to reduce the cost of incoming calls to your business' fixed line phones

Provided some employees with mobile phones so that customers could have the option to use those mobile numbers instead and potentially reduce the cost of the call

Other _____ [CAPTURE]

Q1500

Thinking of the following reasons why you may still have a fixed line phone in your business, please rate the following potential reasons on a scale of 1 to 5 where 5 is most like your reason for keeping a fixed line phone in your business and 1 is least like the reason for keeping a fixed line phone in your business.

1. A fixed line phone is cheaper than using mobile phone for some types of calls
2. Fixed line phone is/are important in terms of the day-to-day functioning of our business
3. Because we need a fixed line connection for internet anyway, and a fixed line phone connection is offered as part of a service bundle
4. There is poor mobile phone coverage in our business premises, so we need to use fixed line phones for business calls
5. Because it means we can have a single contact phone number for the business [i.e. managed on an internal switch/PABX]
6. Other _____ [CAPTURE]

Q1520**OPEN**

Are there any other reasons why you may still have a fixed line phone in your business premises?

FIXED LINE USAGE PATTERNS AND AWARENESS
--

Q3000

Thinking about the categories of calls employees make **from your business premises**, please select what your employees would primarily use for each of the following types of calls. If there are several options which your employees would primarily use, please select multiple options

Type of call	Fixed line phone in your business	Mobile phone	[IF BROADBAND] Skype, Internet calls or VoIP e.g. from a computer, laptop, tablet, or mobile smart phone?
Calls to local fixed line phones			
Calls to national fixed line phones			
Calls to mobile phones on the same network as your mobile phone (such as other employees on the same mobile network)			
Calls to mobile phones on a different network to your mobile phone			
Calls to international numbers			

[ENTER TYPE OF PHONE PREFERRED FOR EACH CATEGORY OF CALL – ENTER ACROSS MULTIPLE IF MULTIPLE PREFERRED/NO PREFERENCE]

REASONS FOR NO LONGER HAVING A FIXED LINE**[IF NOPHONE=FALSE GOTO Q12900]****Q4010**

How long ago did you stop having a fixed line phone in your business premises?

1. Within the last twelve months
2. Between one and three years ago
3. More than three years ago

Q4020**OPEN**

Why don't you have a fixed line phone in your business premises?

[CAPTURE VERBATIMS AND PRECODE]**Q4030**

For each of the following possible reasons for why you decided to no longer have a fixed line phone in your business premises, please state of on a scale of 1 to 5 where 1 is least like your reason and 5 is most like your reason (or 6 is not applicable)

1. Mobile phones are used instead and the business doesn't need a fixed line phone
2. Employees can make calls using Skype or other internet calling services (VoIP) instead from a computer, laptop, tablet, or mobile smart phone
3. The cost of line rental is too high
4. The cost of calls from a fixed line phone are too high
5. The cost of installation or connection is too high

[GOTO Q20000]**BUSINESS RESPONSE TO HYPOTHETICAL RETAIL PRICE INCREASES**

I now want to ask you some questions about possible changes in the costs of your business phone service and how you might react to these price changes. These are not necessarily changes that are planned by your, or any other, fixed line phone supplier - however we are interested in your reactions to them if they were to be hypothetically implemented.

[If the respondent purchases voice services over a traditional fixed line connection or ISDN AND if Q770 = 2]

Q12900

Before I proceed with those questions, I would just like to clarify: What is the average line rental bill for your business?

3. € ____ [CAPTURE]
4. Don't know

[If the respondent purchases voice services over a traditional fixed line connection or ISDN AND if Q770 = 2]

Q13000

Imagine if your fixed line supplier increased the cost of line rental by 10% (insert value based on previous question). Assume that only the price of your phone line rental bill would be affected – costs of calls and other services provided over that connection would not change.

As a consequence of this increase in the cost of line rental, do you believe that the business would change its purchasing behaviour (including cancelling the subscription and switching to an alternative product and/or network operator)?

4. Yes – definitely would change behaviour
5. Yes – maybe change behaviour
6. No

[IF Q13000=1,2]

Q13010

In what ways would the business change its purchasing behavior?

6. I/we would do nothing
7. I/we would cancel the fixed line subscription
8. I/we would keep the subscription but make fewer calls
9. I/we would stay with the current fixed line supplier, but switch to a cheaper package or a bundle of communications services
10. I/we would decrease the number of lines/connections
11. I/we would decrease the number of channels on ISDN
12. I/we would do something else ____ [CAPTURE]

[IF Q13010=2]

Q13020

You have just said that you would cancel the fixed subscription. What would you be most likely to do instead?

8. Give up the fixed line connection and use mobile phones instead

9. Give up the fixed line connection and instead use mobile phones for calls and mobile broadband/data cards/dongles for internet access
10. Switch to an alternative fixed line phone supplier for all fixed phone services
11. Switch to an alternative fixed line phone supplier for line/connections
12. Switch to an alternative fixed line phone supplier for calls and retain current phone supplier for line/connections
13. Switch to a different type of line/connection service (such as a voice service over broadband)
14. Other, please specify

[If Q13020=3,4,6]

Q13025

[IF Q13020=6] Which line/connection service would you consider switching to in the next year?
CAPTURE _____

[IF Q13020=3,4,6] If you were to switch, what type of alternative fixed line connection would you switch to?

1. PSTN (the traditional fixed phone line)
2. ISDN basic rate access (BRA)
3. ISDN fractional rate access (FRA) and/or premium rate access (PRA)
4. Broadband (e.g. over DSL, cable, Fixed Wireless Access, Fibre, etc.)
5. New technologies in the form of IP based services (such as, SIP trunking, VOIP, etc)
6. Leased lines/Ethernet
7. Private data network (VPN)
8. Other, please specify

[IF Q13010 = 3,4]

Q13030

MULTIPLE

Which of the following would your business do instead? Select all that apply.

10. I/we would make more calls on mobile phones
11. I/we would send more texts on mobile phones
12. I would use email or use the internet for social networking messaging (such as Facebook) or instant messaging instead
13. I/we would use Skype, internet calls or VoIP from a computer, tablet, or mobile smart phone instead
14. I/we would make fewer/shorter calls over fixed line and not replace them with other forms of communication
15. I/we would make no changes
16. Other _____ [CAPTURE]

[If Q770=2]

Q14000

What is your average fixed line calls bill for your business?

1. €_____ [CAPTURE]
2. Don't know

[IF Q14000=1]

Q14010

Imagine if your fixed line supplier increased the cost of your business phone calls by 10% (i.e. by VALUE). Assume that only the price of calls would be affected – costs of line rental and other services included in your telecommunications package would not change.

As a consequence of this increase in your business phone calls, do you believe that the business would change its purchasing behaviour (including cancelling the subscription, switching to an alternative product and/or network operator)?

4. YES – definitely would change behaviour
5. Yes – maybe change behaviour
6. NO

[IF Q14010=1,2]

Q14030

In what way would the business be likely to change its behavior?

8. I/we would do nothing [THIS ALLOWS RESPONDENTS TO ADMIT THAT THEY WOULDN'T ACT]
9. I/we would cancel the fixed subscription
10. I/we would switch to a different fixed calls supplier but stay with the existing fixed line rental supplier
11. I/we would keep the fixed subscription but make fewer calls over it
12. I/we would stay with the current supplier but reduce spending on calls within the telecommunications package
13. I/we would stay with our current fixed line supplier but switch to a cheaper package or bundle
14. I/we would do something else _____[CAPTURE]

[IF Q14030 = 2]

Q14040

You have just said that you would cancel the business fixed line phone subscription. What would you do instead?

8. Give up the fixed line connection and use mobile phones instead
9. Give up the fixed line connection and instead use mobile phones for calls and mobile broadband/data cards/dongles for internet access
10. Switch to an alternative fixed line phone supplier
11. I would do something else _____[CAPTURE]

[IF Q14030 = 4,5,6]

Q14050**MULTIPLE**

How would your business maintain communication after reducing its usage of fixed line phones for calls? Select all that apply.

11. I/we would make more mobile calls
12. I/we would send more text messages using a mobile phone
13. I/we would use mobile phones more for both calls and texts
14. I/we would use email or use the internet for social networking messaging (such as Facebook) or instant messaging instead
15. I/we would use Skype, internet calls or VoIP from a computer, tablet, or mobile smart phone instead
16. I/we would make fewer/shorter fixed line calls and not replace them with other forms of communication
17. I/we would make no changes
18. I/we would do something else _____[CAPTURE]

[If Q770 = 1 AND Q76.fixed_voice_telephony.both=TRUE]

Q15000

You mentioned earlier that the business purchases a fixed line phone as well as calls from a single fixed line supplier. Imagine if this fixed line supplier increased the total cost of your bill by 10% (i.e. by **VALUE**).

As a consequence of this **VALUE** increase in the total cost of your bill, do you believe that the business would change its purchasing behaviour (including potentially switching to an alternative supplier)?

4. YES – definitely would change behaviour
5. Yes – maybe change behaviour
6. NO

[IF Q15000= 1, 2]

Q15010

In what way would the business be most likely to change its behavior?

6. I/we would do nothing [THIS ALLOWS RESPONDENTS TO ADMIT THAT THEY WOULDN'T ACT]
7. I we would cancel the fixed subscription
8. I/we would keep the subscription but make fewer calls from the fixed line phones
9. I/we would stay with the current fixed line supplier but switch to a cheaper package
10. I/we would do something else _____[CAPTURE]

[IF Q15010=2]

Q15015

You have just said that you would cancel your subscription, what would you do instead?

6. I/we would give up the fixed line connection and use mobile phones instead
7. Give up the fixed line connection and instead use mobile phones for calls and mobile broadband/data cards/dongles for internet access
8. Switch to another fixed line phone supplier
9. I would do something else _____[CAPTURE]

[IF Q15010=3,4]

Q15020**MULTIPLE**

Which of the following would you/your employees do instead when you need to communicate with other people while at work? Select all that apply.

12. I/we would make more mobile calls
13. I/we would send more text messages using a mobile phone
14. I/we would use mobile phones more for both calls and texts
15. I/we would use email or use the internet for social networking messaging (such as Facebook) or instant messaging instead
16. I/we would use Skype, internet calls or VoIP from a computer, tablet, or mobile smart phone instead
17. I/we would make fewer/shorter fixed line calls and not replace them with other forms of communication
18. I/we would make no changes
19. I/we would do something else _____[CAPTURE]

CONCLUSION OF INTERVIEW