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Competition & Markets Authority

Vodafone/Three Merger Inquiry: Customer list survey

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Contents

1 Introduction

Background, methodology and sample approach

Background

DJS Research (DJS) was commissioned to conduct two surveys to assist the CMA's inquiry into the anticipated joint venture between the UK telecoms businesses, Vodafone Limited and Hutchison 3G UK Limited (referred to as Vodafone and Three, respectively, in this report).

The research covered by this report focused on surveying those who had taken out a new mobile phone package with Vodafone or Three (or one of their brands[1]) in May 2024. The other survey was conducted with a nationally representative sample of UK adults aged 18+ (the UK population survey) and the findings from this are presented in a separate report.

Methodology

An online survey was administered via e-mail and SMS invites. The survey was around 5 minutes in length, and a £10 voucher was offered to incentivise participation.

Sample source and design

The CMA requested non-identifiable customer lists from Vodafone and Three (the 'Parties'), based on the following criteria:

- Activation of a new mobile phone number (either a new phone number or switching from another provider).

Sample was provided by the Parties on a daily basis to reflect activations from three working days prior, and customer contact details (name, mobile telephone, email address and postcode) were requested. Other information on their mobile phone package (contract type,[2] type of services, contract length, data allowance, monthly payment amount, other services received etc) was also requested.

The sample design was important to the success of the survey – by receiving the daily sample, this ensured that respondents had a good recall of their purchase. This resulted in both a good response rate and low proportions of 'don't know' answers throughout the survey.

[1] Vodafone brands: Vodafone, VOXI and Talkmobile; Three brands: Three and Smarty.

[2] Pay monthly on a contract, pay monthly for a bundle on a rolling basis (both referred to as PAYM); Pay-as-you-go top-ups (referred to as PAYG).

Issued sample & respondents

A total of 28,204 sample records were issued in batches. Fieldwork was conducted from the 17th May – 6th June 2024.

Batches were designed to achieve 650-700 responses per Party, with the below target proportions:

	PAYM	PAYG
Vodafone	64%	24%
VOXI	N/A	8%
Talkmobile	4%	N/A

	PAYM	PAYG
Three	66%	24%
SMARTY	N/A	10%

For many PAYG customers, email addresses were not available. Some of these customers were invited to take part in the survey via SMS invites, however, the response to SMS was very low (<1%), therefore in order to preserve the response rate, the majority of the sample was deployed to customers with an email address.

A total of 1,527 responses were received– 1,520 via email and 7 via SMS. (response rate calculations are below). Up to 5 reminders were issued to encourage response.

Research design

Overview

DJS Research worked with the CMA to finalise the questionnaire. The questionnaire was piloted via 10 telephone interviews, whereby respondents could provide feedback and questions were tested for understanding (cognitive testing).

Cognitive testing

The cognitive testing primarily focussed on ensuring questions could be easily understood and that all options were included in pre-coded lists, with a particular focus on obtaining feedback on the diversion questions.

From the cognitive testing it was clear that consumers are well informed about their choice of mobile phone packages as they had recently made a purchase.

When asked about 'network service': respondents understood what was meant by this and could distinguish what they do on their provider's network service rather than WiFi.

For the quality diversion question, respondents understood what 'a bit less reliable' meant within this question. When asked to define what was meant by "reliable" in the context of network, respondents defined this as:

- Consistent network i.e., their signal not dropping in and out or cutting off completely
- No troubleshooting or technical issues when using their mobile phone's network

- Ability to send or receive messages and calls without disruption
- On a 4G or 5G network (versus 3G or "no signal")

For the forced diversion question, consumers had good recall and confidence in their next best option chosen, with few 'don't know' answers.

Following the cognitive testing, minor tweaks were made to the wording of some questions and answer codes for clarity.

The survey materials used are provided at the Appendix at the end of this report.

Sample breakdown and response rate

The overall response rate achieved was 6.2%. There were a few qualifying criteria for the survey: respondents must be over 18, have recently taken out a mobile phone package and have chosen and paid for this package themselves. The eligibility rate was 87%, with a total of 219 screen-out responses received.

Sample breakdown

Table 1: Breakdown of sample

	Number
Invites issued	28,204
Interview complete	1,527
Screen outs (ineligible)	**219**
Under 18	22 *(10%)*
Did not recently take out mobile phone package	81 *(37%)*
Did not pay for mobile phone package themselves	52 *(24%)*
Did not choose mobile phone package themselves	64 *(29%)*
Eligibility rate Number of completes/ (number of completes+ screen outs)	87%
Response rate*	**6.2%**

*Response rate = number of completes / (number of delivered emails x eligibility rate)

Response rate

A more detailed breakdown of the response rate is shown below. As well as splitting responses into email and SMS (depending on how the invite was administered), response rates were also analysed by brand and contract type.

The response rate to email invitations was 7% overall, though this varied by brand and contract type as shown below. Very few responses to the SMS invites were received, resulting in a response rate of just 0.4%. This led to an overall combined response rate of 6.2%.

Table 2: Response rate

Email invites	PAYM	PAYG	Total
Vodafone	6.4%	6.3%	6.4%
VOXI	-	6.8%	6.8%
Talk Mobile	13.5%	-	13.5%
Three	6.9%	6.7%	6.9%
Smarty	-	11.5%	11.5%
TOTAL	**6.8%**	**7.3%**	**7.0%**

SMS invites	PAYM	PAYG	Total
Vodafone	0.7%	0.5%	0.5%
VOXI	-	0.0%	0.0%
Talk Mobile	-	-	0.0%
Three	-	0.0%	0.0%
Smarty	-	-	0.0%
TOTAL	**0.7%**	**0.4%**	**0.4%**

All invites	PAYM	PAYG	Total
Vodafone	6.3%	3.4%	5.2%
VOXI	-	6.8%	6.8%
Talk Mobile	13.5%	-	13.5%
Three	6.9%	5.5%	6.5%
Smarty	-	11.5%	11.5%
TOTAL	**6.8%**	**5.3%**	**6.2%**

N.B. Grey cells indicate no sample deployed (as no customers fell into these categories

Analysis and weighting

Analysis

Apart from the demographic data, all survey results in this report have been weighted to reflect the stock of customer numbers in terms of mobile brand and mobile plan type (e.g. PAYM/PAYG).

Approach to weighting

The interviewed sample was a close match to the customer profile and broadly in line with the stock of customer numbers. Corrective weights have been applied to the data ensuring parity with the stock customer profile.

Table 3: Interviewed sample and weighting

Party	Brand/ contract type	Interviewed sample	Weight – stock of customers	Weighting efficiency
Three	Three – PAYG	20.3%	[10-20]%	97.46%
	Three – PAYM[3]	65.3%	[70-80]%	
	Smarty – PAYG	14.4%	[10-20]%	
Vodafone	Vodafone – PAYG	17.7%	[20-30]%	96.51%
	Vodafone – PAYM	66.4%	[60-70]%	
	VOXI – PAYG	8.4%	[5-10]%	
	Talkmobile – PAYM	7.5%	[0-5]%	

N.B. Certain combinations are not included due to brands not offering all types of contract (e.g. Smarty only sell PAYG contracts).

The weighting efficiency for the weight to stock of customers is 96.96%, much greater than the cut-off-point of 70%. In addition to weighting efficiency, it is also important to look at the actual size of the weights. There are several basic rules:

- No weights should be above 5.0 or close to zero
- The percentage of respondents with a weight greater than 3.0 should be less than 5% of the sample
- The average weight for outliers (>2.0) should not exceed 3.0

The maximum weight for stock customers is 1.22. There are no weights >5.0 and no weights that have a value >3.0 and there are no outlier weights. Therefore, our weighting systems upholds all rules necessary for a weighting system to be fit for purpose.

[3] Pay monthly on a contract, pay monthly for a bundle on a rolling basis (both referred to as PAYM); Pay-as-you-go top-ups (referred to as PAYG).

Further information on weighting

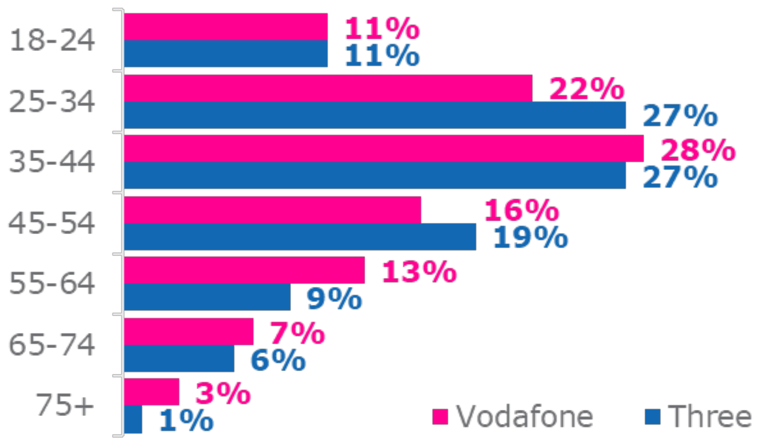
DJS has also provided the CMA with a second weighting by the stock of customer revenue (in terms of mobile brand and plan type), which the CMA is using for it's own analysis.

Demographic overview

Overview

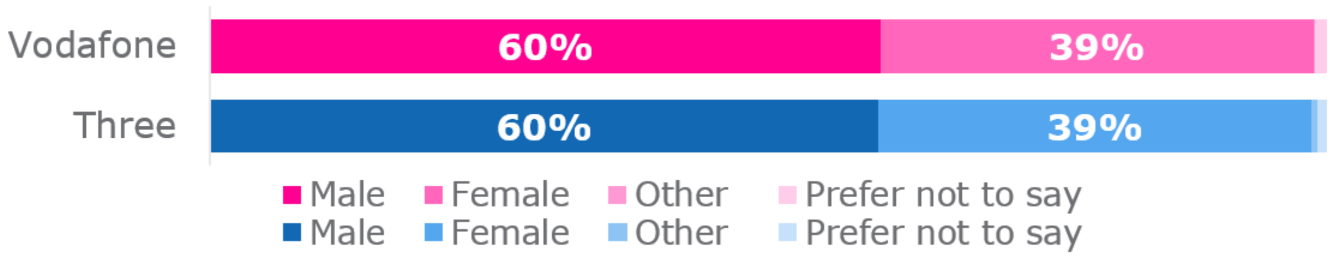
The following charts provide an overview of the demographic breakdown of the survey respondents – this data is unweighted. This is provided in order to place the respondents in context and has not been used for analysis purposes.

Figure 1: Age



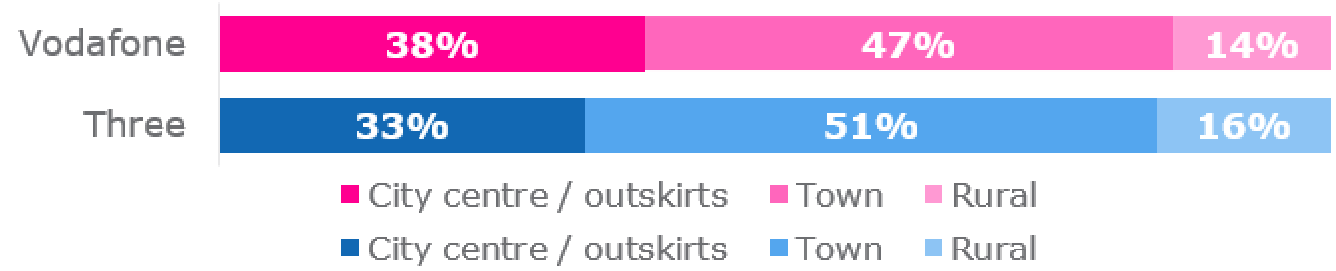
Source: S01. What age group do you fall into?
Base: all respondents; Vodafone (n=723), Three (n=804).

Figure 2: Gender



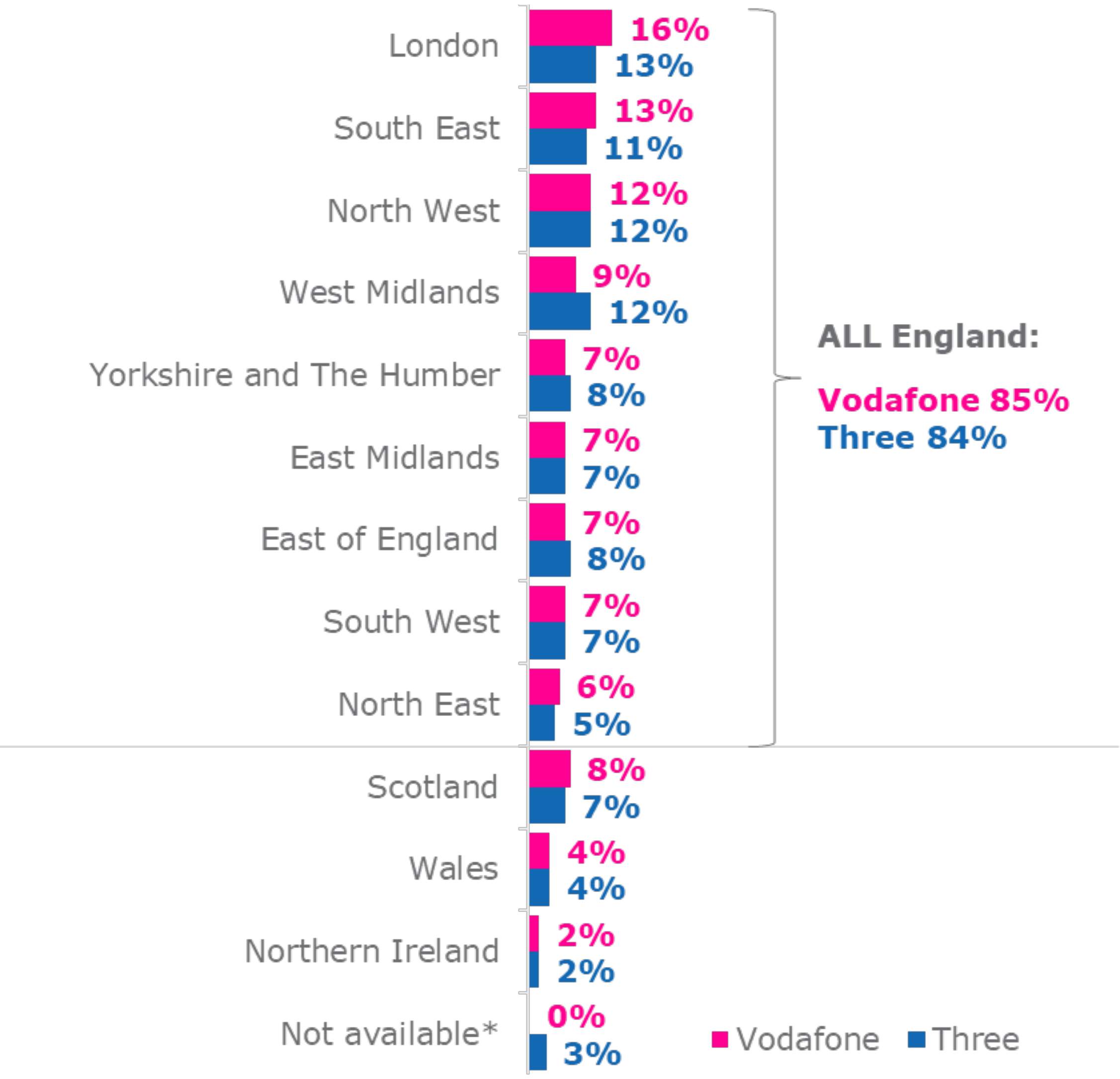
Source: D01. Please select your gender.
Base: all respondents; Vodafone (n=723), Three (n=804).

Figure 3: Setting



Source: D05. Which of the following best describes the area you live in?
Base: all respondents; Vodafone (n=723), Three (n=804).

Figure 4: Country and region



Source: D03. Which region of England do you live in?
Base: all respondents; Vodafone (n=723), Three (n=804).

*Region was derived from postcode which was provided either from the sample or by the respondent during the survey. In some cases, invalid postcodes were supplied and therefore we were unable to assign a region or country to the respondent. These respondents are included in the chart as 'not available'.

2 Summary of key findings

Purchase of mobile phone package

Influencing factors on choice of provider

Prior to choosing a mobile phone provider, the most common action was looking at what was available on the provider's website, closely following by looking at what was available on other providers' websites.

Negotiating a mobile phone package

Three in ten tried to negotiate a better deal than the first one they were offered. Of these, two-thirds were successful in their negotiations. The most common outcome was a decrease in the cost of the package, followed by an increase in the data allowance.

Usage of network data

Smartphone usage

The vast majority of respondents have a smartphone (96% Vodafone, 98% Three).

Usage of network service

Network data is mostly used for instant messaging services, browsing the internet and sending/ reading/ receiving emails.

Choice factors

Choice factors: Price is the most common reason for choosing a mobile phone provider overall, particularly for Three customers. Almost six in ten chose Vodafone because of the network quality, with fewer choosing Three for this reason. There are differences in other choice factors according to Party.

Hypothetical scenarios

Price diversion

If prices were 10% more expensive, around a third would choose the same package and pay the higher price. A quarter would choose a different deal with the same provider. One in five would choose a different provider and a further one in ten would not have chosen a mobile phone package – these respondents are considered to be 'price marginal' (27% Vodafone, 28% Three).

Quality diversion

If the network was a bit less reliable, around a third would have chosen the same mobile phone package. Around half would choose a different provider and another one in ten would not have purchased a mobile phone package – these respondents are considered 'quality marginal' (60% Vodafone, 57% Three).

Diversion – all respondents

If a respondent's mobile phone provider had ceased offering mobile phone services, the most common brand respondents would divert to[4] overall is EE. For Vodafone customers, 9% would divert to a Three brand and 8% would divert to another Vodafone brand. For Three customers, 17% would divert to a Vodafone brand and just 2% would divert to another Three brand.

Diversion – price marginal respondents

The most common brand diverted to would be EE. For Vodafone customers, 11% would divert to a Three brand (a higher proportion compared with all customers), and 5% to another Vodafone brand. For Three customers, 13% would divert to a Vodafone brand and just 0.4% to another Three brand.

Diversion – quality marginal respondents

The most common brand diverted to would be EE. For Vodafone customers, 8% would divert to a Three brand and 6% would divert to another Vodafone brand. For Three customers, 16% would divert to a Vodafone brand and just 1% would divert to another Three brand.

[4] Also referred to as their next best alternative.

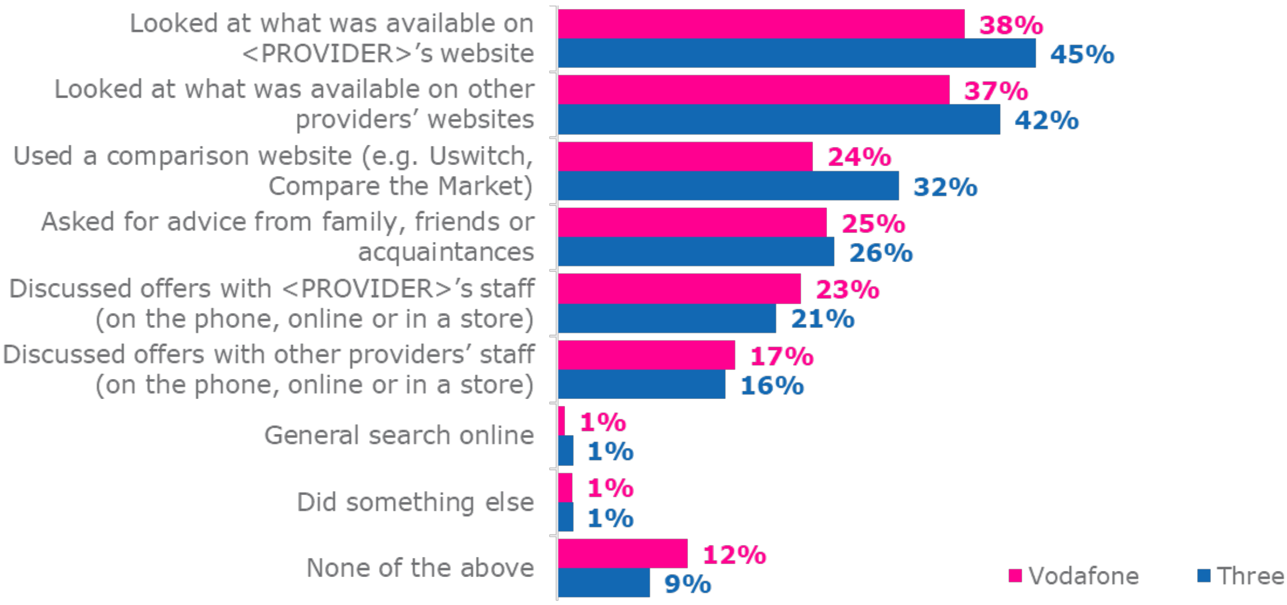
3 Survey results

Purchase of mobile phone packages

Influencing factors on choice of provider

Respondents were asked what actions, if any, they took before choosing their current provider. The most common action taken was for respondents to look at what was available on the provider's website, closely followed by looking at other providers' websites. Around three in ten used a comparison website and a quarter asked for advice from family, friends or acquaintances.

Figure 5: What did you do before you chose your provider?



Source: Q09. Which, if any, of the following did you do before you chose <PROVIDER> as your mobile network provider? **Base:** all respondents; Vodafone (n=723), Three (n=804).

Negotiating a mobile phone package

Respondents were asked if they tried to negotiate a better deal than the one they were first offered. Around three in ten tried to negotiate a better deal than the first one they were offered[5] (Vodafone customers, 31%; Three customers, 28%).

Of those who said they tried to negotiate a better deal, two-thirds of these (67% for both Vodafone and Three customers[6]) were successful in negotiating a better deal.

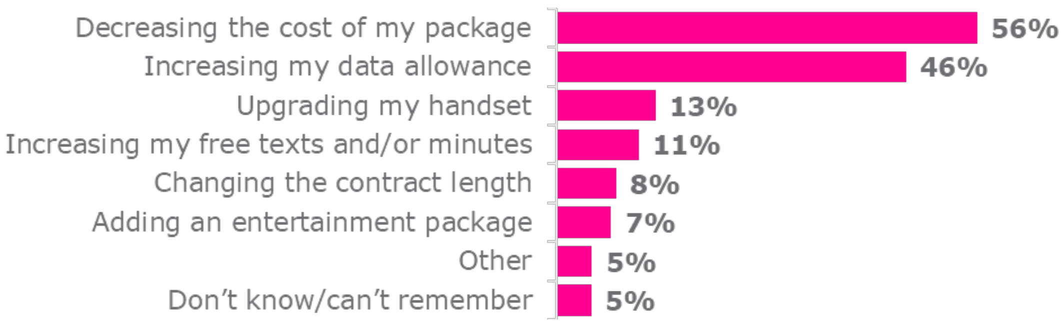
[5] **Source:** Q01.Thinking about your current mobile phone package did you try to negotiate a better deal than the one you were first offered? **Base:** all Vodafone customers (n=723), all Three customers (n=804).

[6] **Source:** Q02. And did you manage to get a better deal than was originally offered by <PROVIDER>? **Base:** those that tried to negotiate a better deal; Vodafone customers (n=223), Three customers (n=226).

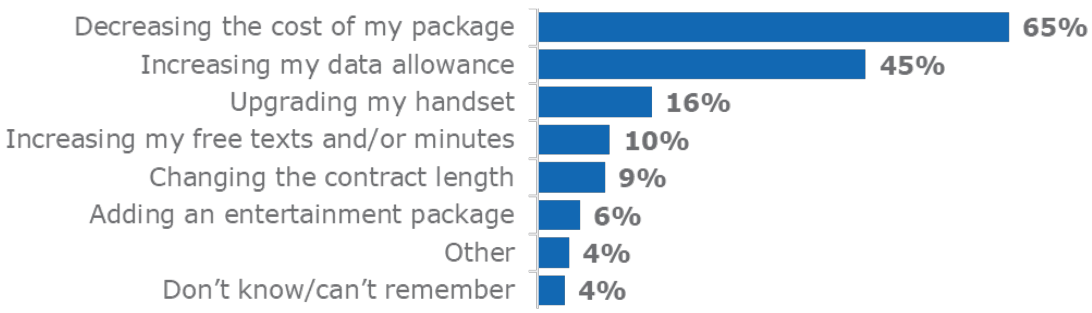
Those who successfully negotiated a better deal were asked what was better about the new deal. The most common outcome of these successful negotiations was to decrease the cost of the package, followed by increasing the data allowance. Results are similar across the two Parties and are shown in the two charts below.

Figure 6: And what was better about the deal?

Vodafone



Three



Source: Q03. And what was better about the new deal? **Base:** those who managed to negotiate a better deal; Vodafone customers (n=148), Three customers (n=152).

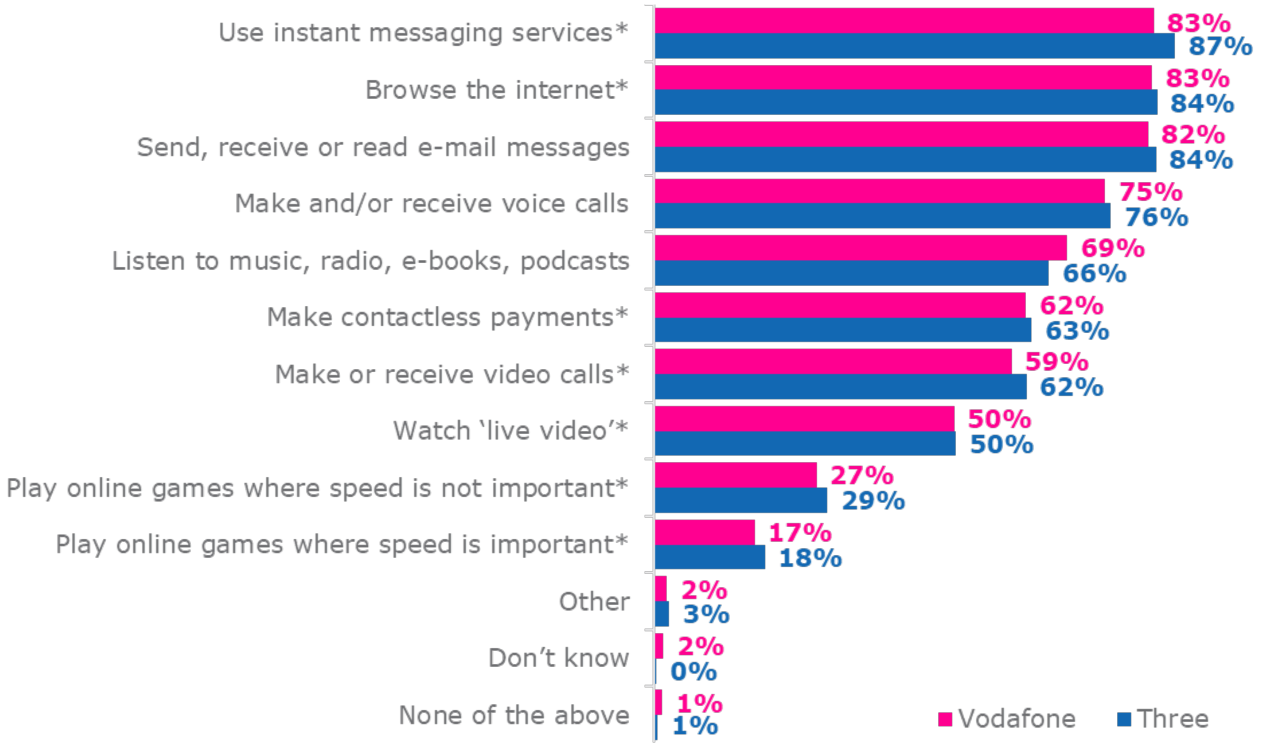
Usage of network data

Network usage on smartphones

When asked if their mobile phone is a smartphone, the vast majority said yes (Vodafone customers, 96%; Three customers, 98%[7]).

Those with a smartphone were asked which activities they do when using their providers' network service (as opposed to being on WiFi). Of those listed, the most commonly selected activities were instant messaging services, browsing the internet and sending/reading/receiving emails.

Figure 7: Usage of network service



Source: Q06. Which of the following do you do when using your provider's network service (i.e. when not on a WiFi connection and using your own data)?
Base: those with a smartphone; Vodafone (n=696), Three (n=787).

*full code descriptions:

- Use instant messaging services (e.g. WhatsApp, Facebook Messenger, Snapchat, iMessage)
- Browse the internet (e.g. read content, search for something, look at pictures)
- Make contactless payments at point of sale/checkouts/rail or bus fares
- Make or receive video calls (e.g. Teams, Zoom, Google meet, WhatsApp, Facetime etc)
- Watch 'live video' e.g., live sports events, concerts via TV channels, YouTube, Netflix etc.
- Play online games where speed is not important (e.g., Chess, Minecraft)Play online games where speed is important (e.g., Valorant, Call of Duty)

[7] **Source:** Q05. Is your mobile phone a smartphone?
Base: all Vodafone customers (n=723), all Three customers (n=804).

Choice factors

Reasons for choosing current provider (multi-response)

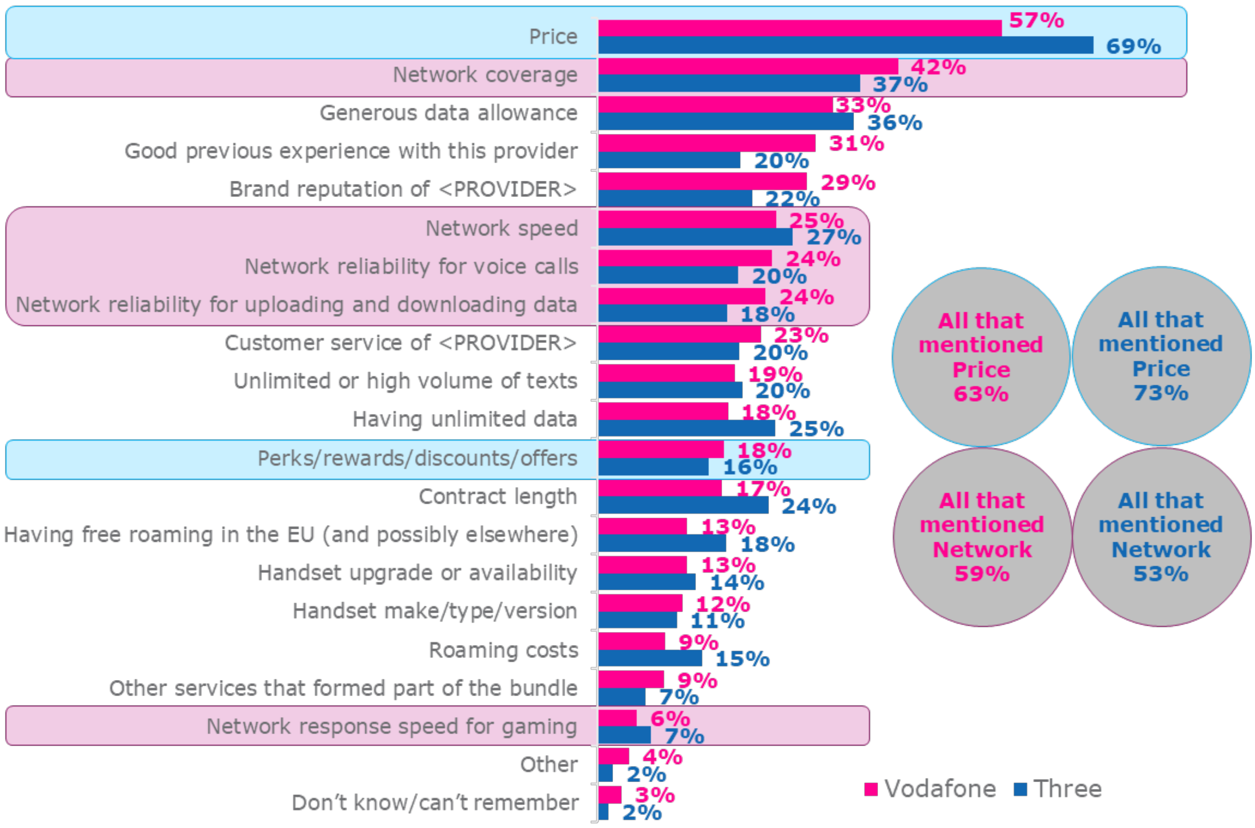
Respondents were asked to think back to when they took out their mobile phone package and to select the reasons why they chose their current provider over any other provider.

The most common reason for choosing a mobile phone provider is price – this is particularly the case for Three customers (almost three-quarters). Almost six in ten chose Vodafone because of network quality, whilst just over half chose Three for this reason.

There are some differences in the choice factors according to Party:

- **Three** brand customers were more likely to say they chose their provider due to contract length, price and a generous data allowance.
- **Vodafone** brand customers were more likely to say they chose their provider due to network reliability (voice calls, for uploading/ downloading), network coverage, brand reputation and good previous experience.

Figure 8: Reasons for choosing provider



Source: Q07. Thinking back to when you took out your mobile phone package with <PROVIDER>, which of the following were reasons for choosing <PROVIDER>, rather than any other provider?
Base: all respondents; Vodafone (n=723), Three (n=804).

N.B. where <PROVIDER> is shown, respondents saw the relevant provider they are currently with (Vodafone, VOXI, Talk Mobile, Three (3), SMARTY).

Reason for choosing current provider (single-response)

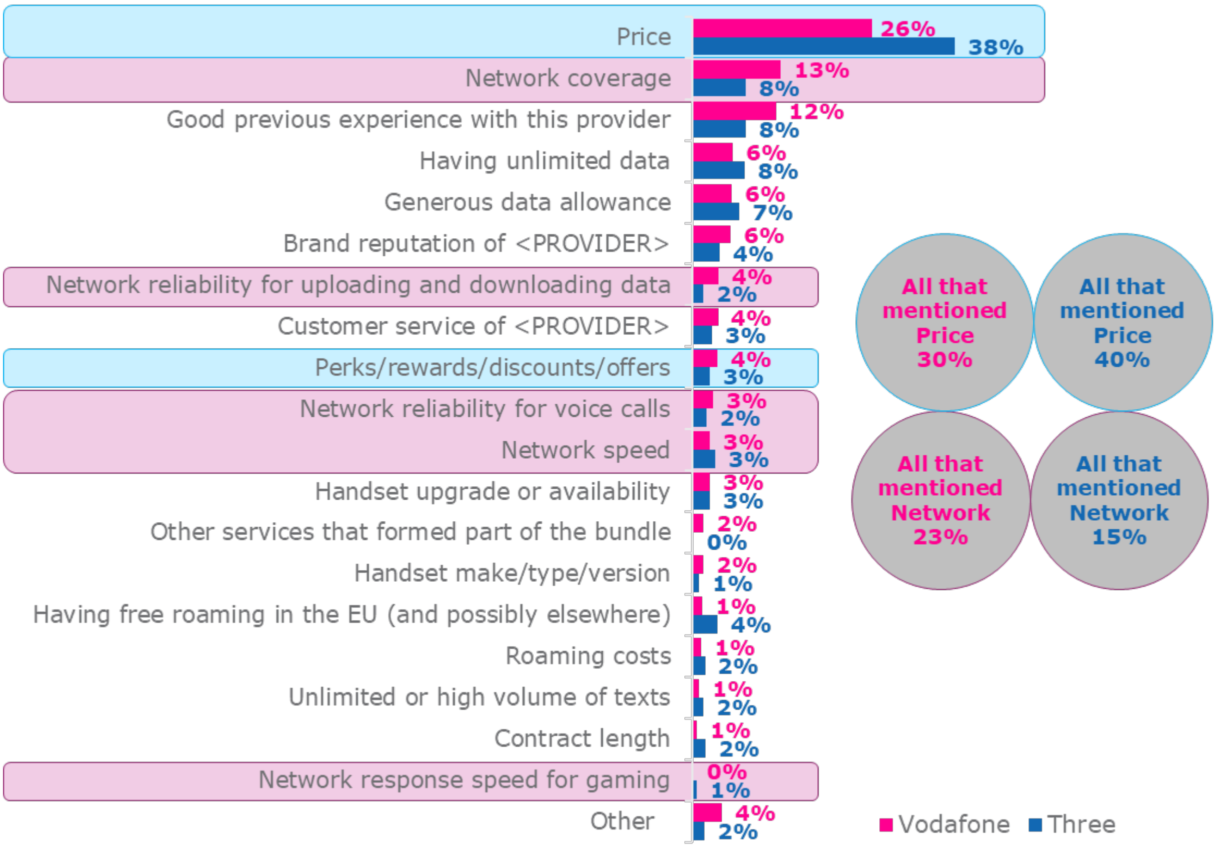
Those who selected more than one reason for choosing their provider were then asked to select one main reason[8].

Price is the most common single main reason for choosing a provider - three in ten chose Vodafone for this reason and four in ten chose Three due to price.

Network quality is also important, with almost a quarter choosing Vodafone brands due to network quality and one in six choosing Three brands for this reason.

Other common reasons providers were chosen include good previous experience, unlimited or generous data allowance and brand reputation.

Figure 9: Main reason for choosing provider



Source: Q08. And which of these was the single main reason for choosing <PROVIDER>?
Base: all customers excluding DK at Q07; Vodafone (n=699), Three (n=792).

N.B. where <PROVIDER> is shown, respondents saw the relevant provider they are currently with (Vodafone, VOXI, Talk Mobile, Three (3), SMARTY).

*full code descriptions:

- Use instant messaging services (e.g. WhatsApp, Facebook Messenger, Snapchat, iMessage)
- Browse the internet (e.g. read content, search for something, look at pictures)
- Make contactless payments at point of sale/checkouts/rail or bus fares
- Make or receive video calls (e.g. Teams, Zoom, Google meet, WhatsApp, Facetime etc)
- Watch 'live video' e.g., live sports events, concerts via TV channels, YouTube, Netflix etc.
- Play online games where speed is not important (e.g., Chess, Minecraft)
- Play online games where speed is important (e.g., Valorant, Call of Duty)

[8] For those who only selected one response at Q07, their response to Q08 was auto-filled in the survey so that we have one response for all respondents at Q08.

Diversion questions

The following section focuses on purely hypothetical scenarios, looking at what mobile phone users would do if – at the time they chose their mobile phone package – their current provider was no longer offering mobile phone services, had increased prices, or had decreased network quality.

Diversion: all respondents

When asked which provider they would have chosen if their current provider had ceased offering mobile phone services, the most common next best alternative for both Vodafone and Three customers is EE at around a quarter (Figures 10 and 11).

Around one in ten Vodafone customers would have chosen a Three brand instead (9%), whilst one in six Three customers would have chosen a Vodafone brand (17%). Almost one in ten Vodafone customers would divert to another Vodafone brand (8%), whilst very few Three customers would divert to another Three brand (2%).

A proportion of respondents said 'don't know' (just over one in ten).

Figure 10: Second choice brands – Vodafone customers

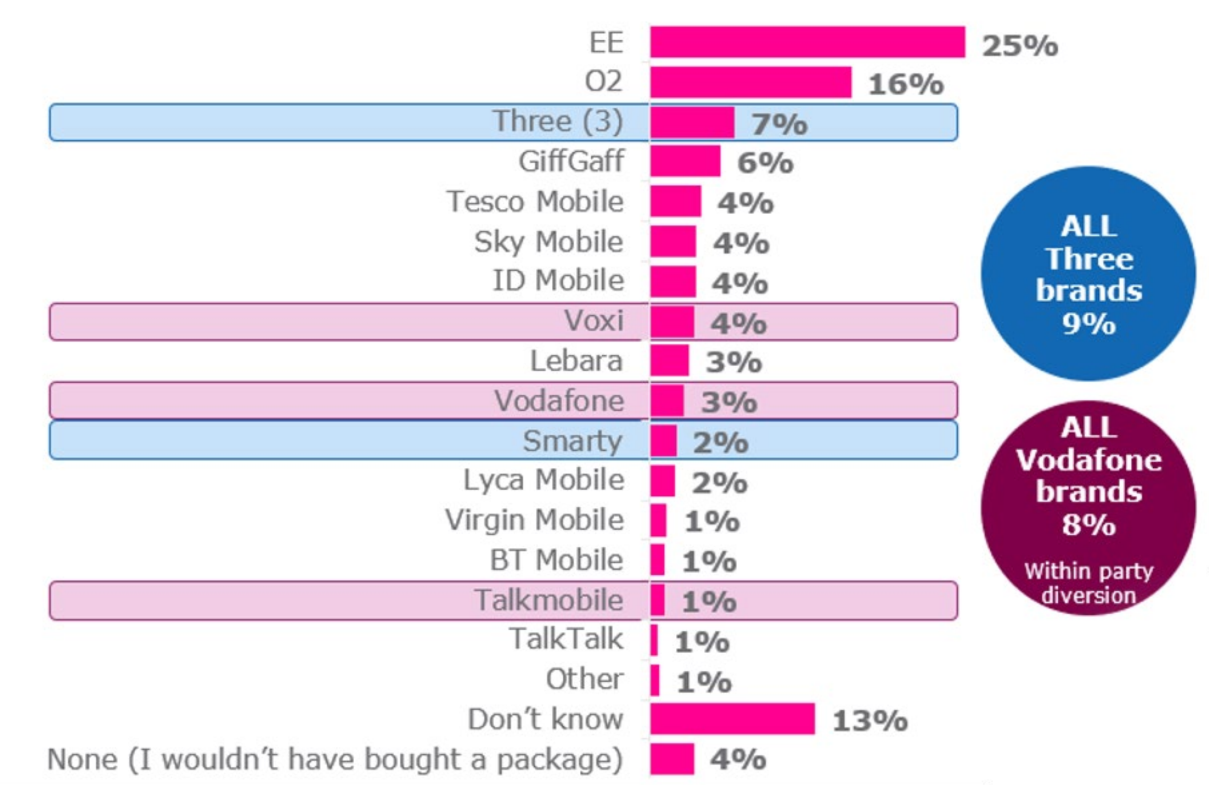
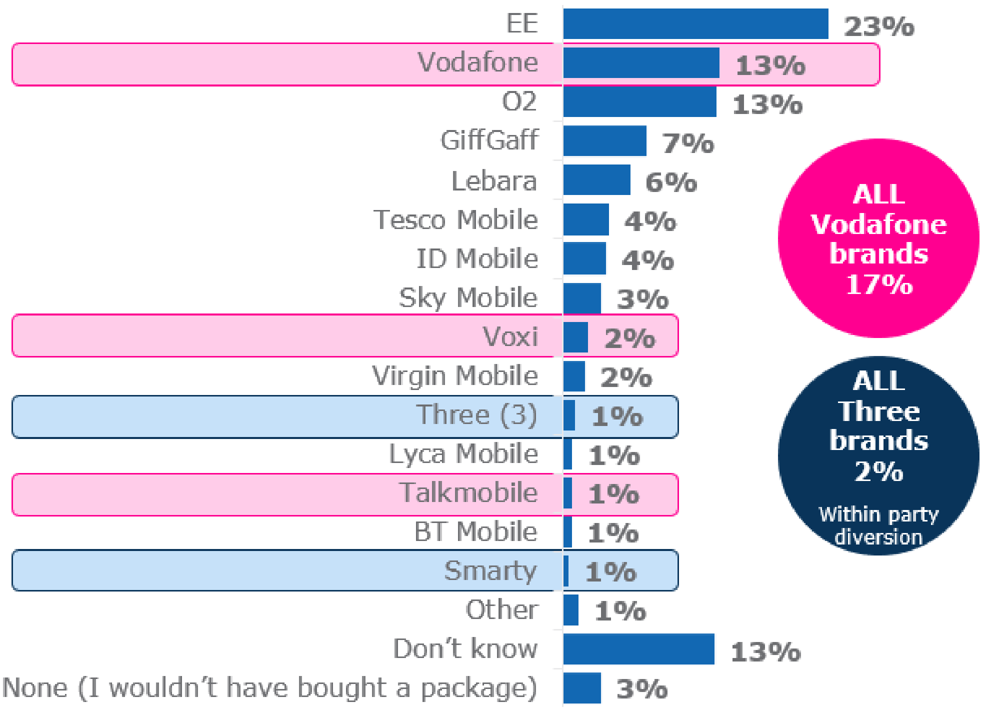


Figure 11: Second choice brands – Three customers



Source: Q13. If, when you chose your mobile phone package, your provider had ceased offering mobile phone services, which mobile network provider would you have been most likely to have chosen instead? **Base:** all respondents; Vodafone (n=723), Three (n=804).

N.B. All brands selected by <1% are not shown individually in the chart but are included in 'other'.

Price diversion

When asked what they would do if prices were 10% more expensive, just over a third of each Party's customers said they would have chosen the same package with the same provider (Vodafone: 35%, Three: 37%) and a further quarter would choose a different deal with the same provider (Vodafone: 26%, Three: 23%).

Just under three in ten are price marginal (meaning they would have chosen a different mobile network provider or not chosen a mobile phone package at all) (Vodafone: 27%, Three: 28%).

Figure 12: Price marginal – Vodafone customers

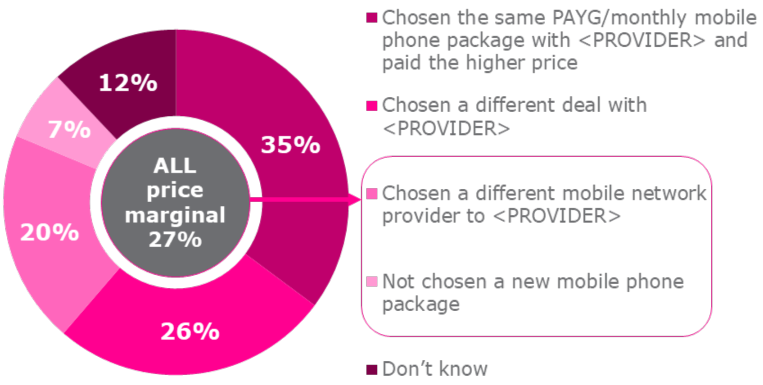
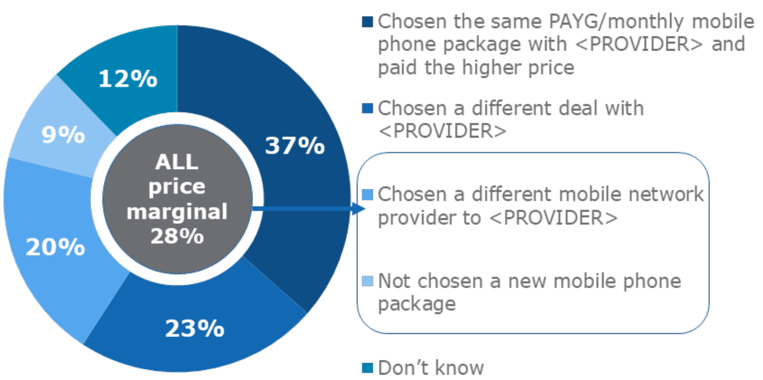


Figure 13: Price marginal – Three customers



N.B. Respondents giving an 'other' answer were back-coded into a pre-coded response (responses were reviewed by both DJS Research and the CMA).

Source: Q10. PAYM customers. If, at the time you chose your monthly mobile phone package, the prices of <PROVIDER>'s mobile phone usage/airtime had been 10% more expensive per month (and it was not possible to negotiate a better deal), but the prices offered by all other mobile network providers were unchanged, which of the following do you think you would have been most likely to have done? **Source: Q11. PAYG customers.** If, at the time you chose your pay-as-you-go (PAYG) package, all the prices of <PROVIDER> had been 10% more expensive each month, i.e. the price you would have had to pay would have been approximately another <£x> of top-up per month for the same amount of use, but the prices offered by other providers were unchanged, which of the following do you think you would have been most likely to have done? **Base:** all respondents excluding PAYG customers who don't know their average monthly spend; Vodafone (n=706), Three (n=796).

Diversion: price marginal customers only

When looking at price marginal customers only (see above), their next best alternatives (referred to as their 'second choice brands' in the charts) are similar to those that would be diverted to for all respondents, with EE remaining the top choice (Figures 14 and 15).

A higher proportion of price marginal Vodafone customers would divert to a Three brand when compared with Vodafone customers as a whole (11% vs 9%). Within-party diversion is slightly lower for price marginal customers compared with all respondents: just one in twenty Vodafone customers would divert to another Vodafone brand (5% vs 8%) and <1% of Three customers would divert to another Three brand (0.4% vs 2%).

For charts 14 and 15, where a respondent said they would have 'chosen a different mobile network provider' in response to a 10% price increase (see Figures 12 and 13 above) their next best alternative has been taken from their response to the forced diversion question (i.e. the hypothetical scenario where their provider had ceased offering mobile phone services). Where a respondent said they would have 'not chosen a mobile phone package' (if prices were 10% more expensive) they are counted within 'none (I wouldn't have bought a package)'. The Appendix includes charts where those who said they would have 'not bought a mobile phone package' (if prices were 10% more expensive) are treated in a different way.

Figure 14: Second choice brand: Vodafone price marginal customers

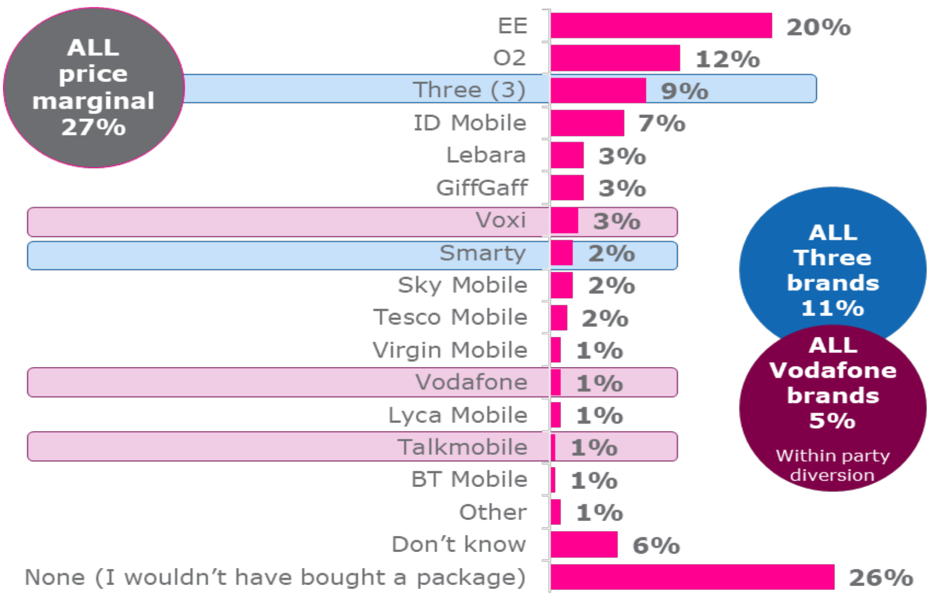
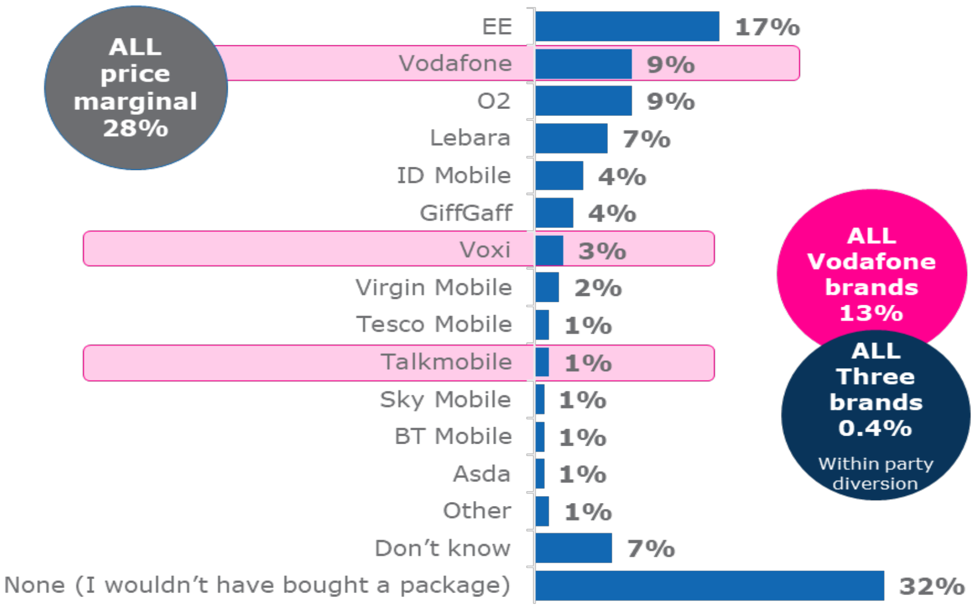


Figure 15: Second choice brand: Three price marginal customers



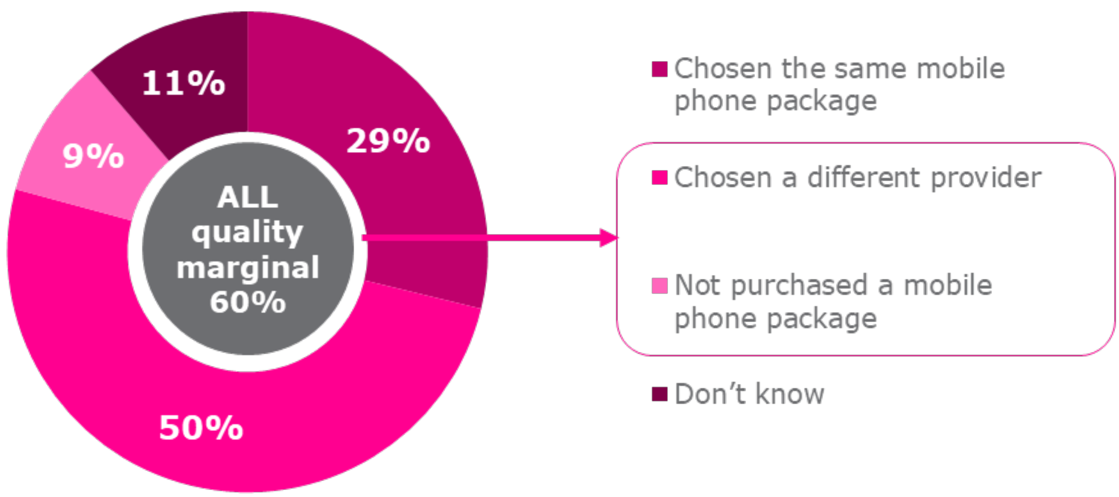
Source: Q10, Q11 and Q13 (see Source for Figures 12 and 13 and for Figures 10 and 11 above).
Base: price marginal customers; Vodafone (n=192), Three (n=226).

N.B. All brands selected by <1% are not shown individually in the chart but are included in 'other'.

Quality diversion

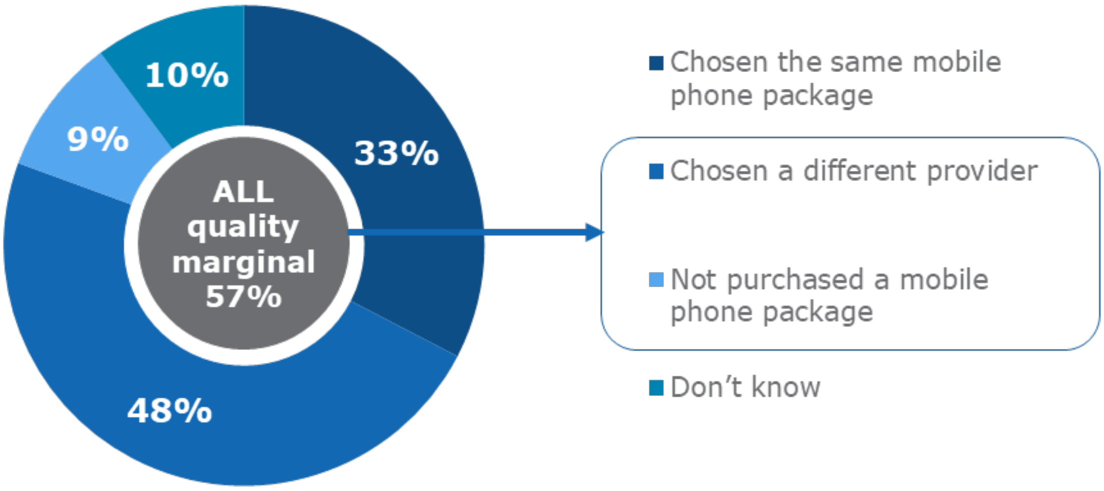
When asked what they would do if their providers' network was a bit less reliable, around half would have chosen a different provider (Vodafone: 50%, Three: 48%) and one in ten would have not purchased a mobile phone package (Vodafone and Three both 9%), meaning that around six in ten are considered 'quality marginal' (Vodafone: 60%, Three: 57%). Three in ten would have chosen the same mobile phone package (Vodafone: 29%, Three: 33%).

Figure 16: Quality marginal - Vodafone



N.B Respondents giving an 'other' answer were back coded into a pre-coded response.

Figure 17: Quality marginal - Three



N.B Respondents giving an 'other' answer were back coded into a pre-coded response.

Source: Q12. If, at the time you chose this package, the network of the provider was a bit less reliable, which of the following would you most likely have done?
Base: all respondents; Vodafone (n=723), Three (n=804).

Diversion: quality marginal customers only

When looking at quality marginal customers only, their next best alternatives (referred to as their 'second choice brands' in the charts) remain similar to those for all respondents (Figures 18 and 19) with EE being the top choice once more for each Party's customers. Just under one in ten Vodafone customers would divert to a Three brand (8%), and around one in six Three customers would divert to a Vodafone brand (16%). Within-party diversion is similar for quality marginal customers as it is for price marginal customers, with around one in twenty for Vodafone (6%) and a very small proportion for Three (1%).

For charts 18 and 19, where a respondent said they would have 'chosen a different mobile network provider' in response to a deterioration in network reliability (see Figures 16 and 17 above) their next best alternative has been taken from their response to the forced diversion question (i.e. the hypothetical scenario where their provider had ceased offering mobile phone services). Where a respondent said they would have 'not purchased a mobile phone package' (in response to a deterioration in network reliability) they are counted within 'none (I wouldn't have bought a package)'. The Appendix includes charts where those who said they would have 'not purchased a mobile phone package' (in response to a deterioration in network reliability) are treated in a different way.

Figure 18: Second choice brands – Vodafone quality marginal customers

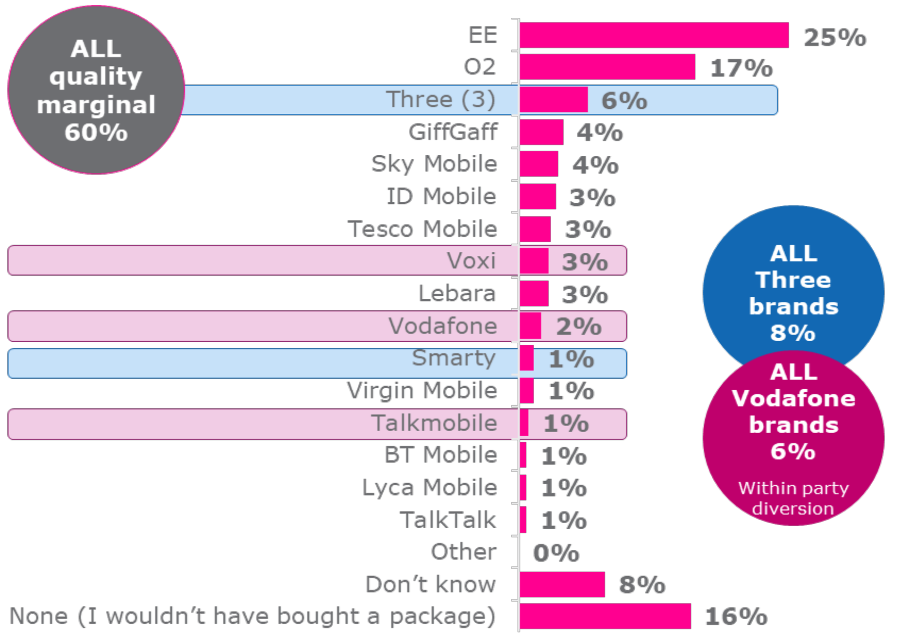
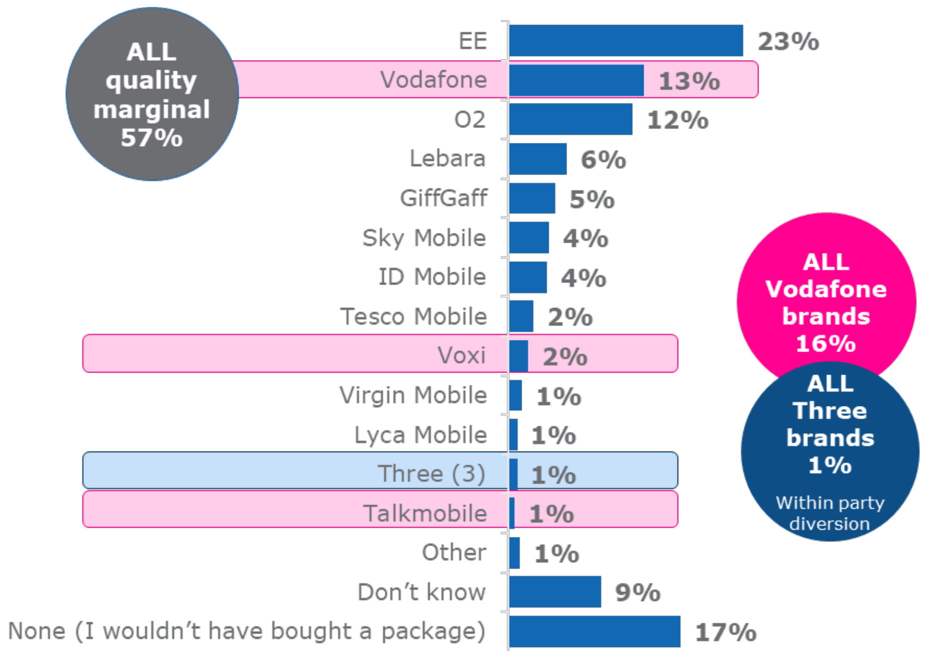


Figure 19: Second choice brand – Three quality marginal customers



Source: Q12 and Q13 (see Source for Figures 16 and 17 and for Figures 10 and 11 above).
Base: quality marginal customers; Vodafone (n=433), Three (n=460).

N.B. All brands selected by <1% are not shown individually in the chart but are included in 'other'.

Price and quality marginal customers

When looking at the proportion of customers who are price marginal and who are quality marginal, there are some slight differences according to Party and contract type but no statistically significant differences. These figures are shown in the charts below.

Figure 20: Price and Quality marginal proportions

Price marginal

***Definition**: If prices were 10% more expensive, they would choose a different provider or not purchase a mobile phone package.*

	PAYM	PAYG
Vodafone	27%	27%
Three	30%	24%

Quality marginal

***Definition**: If the network was a bit less reliable, they would choose another provider or not purchase a mobile phone package.*

	PAYM	PAYG
Vodafone	61%	58%
Three	56%	60%

Price marginal. Source: Q10. If, at the time you chose your monthly mobile phone package, the prices of <PROVIDER>'s mobile phone usage/airtime had been 10% more expensive per month (and it was not possible to negotiate a better deal), but the prices offered by all other mobile network providers were unchanged, which of the following do you think you would have been most likely to have done? **Base**: PAYM customers – Vodafone (n=510), Three (n=597). **Source**: Q11. If, at the time you chose your pay-as-you-go (PAYG) package, all the prices of <PROVIDER> had been 10% more expensive each month, i.e. the price you would have had to pay would have been approximately another <£x> of top-up per month for the same amount of use, but the prices offered by other providers were unchanged, which of the following do you think you would have been most likely to have done? **Base**: PAYG customers excluding those who don't know their average monthly spend - Vodafone (n=196), Three (n=198).

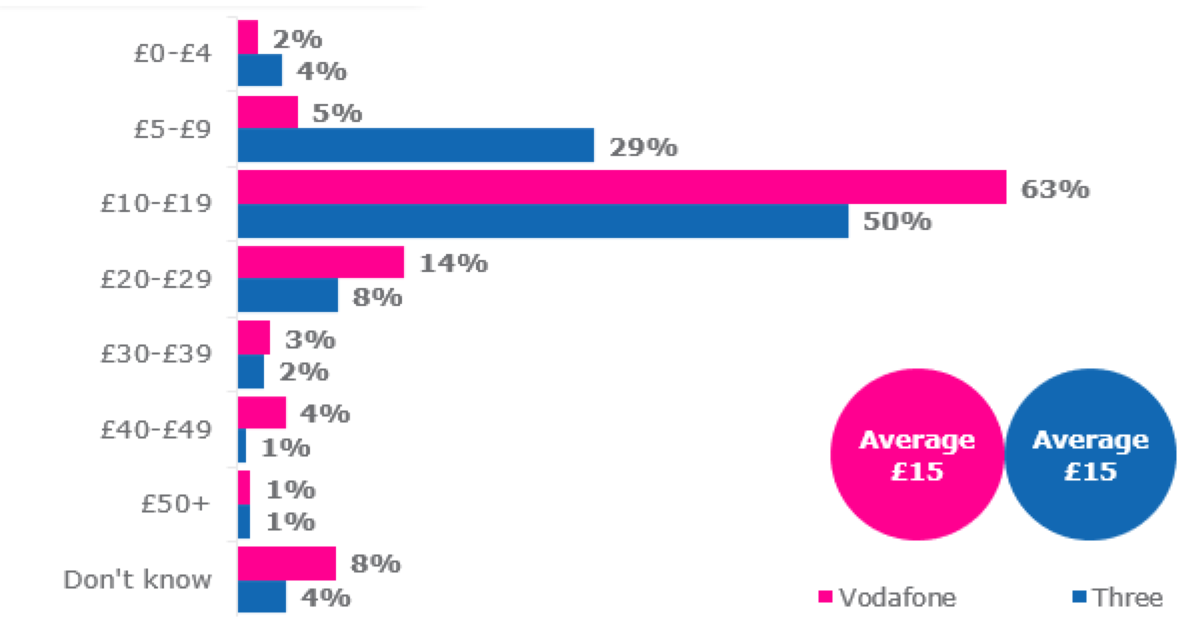
Quality marginal. Source: Q12. If, at the time you chose this package, the network of the provider was a bit less reliable, which of the following would you most likely have done? **Base**: all respondents – Vodafone (n=723), Three (804).

4 Appendix

PAYG top-up: estimate of monthly spend

The price diversion question for PAYG top-up customers incorporates information on expected average monthly spend that was collected during the survey (for other types of mobile phone package, information on customer spend was provided to the CMA by the Parties). Those respondents who said 'don't know' (see Figure 21 below) were not asked the price diversion question and so not included in the base for the analysis of price marginal customers.

Figure 21: PAYG top-up: estimate of monthly spend



Source: Q04. Approximately how much do you expect to pay on average per month for the mobile phone services you will use? **Base:** Vodafone PAYG top-up customers (n=213), Three PAYG top-up customers (n=207).

Diversion: price marginal customers only

Note: in contrast to Figures 14 and 15, for the following two charts where a respondent said they would have 'not chosen a mobile phone package' (if prices were 10% more expensive) rather than being counted under 'none (I wouldn't have bought a package)' they are counted under the brand (or other response) they gave at the forced diversion question (i.e. the hypothetical scenario where their provider had ceased offering mobile phone services).

Figure 2220: Second choice brand – Vodafone price marginal customers

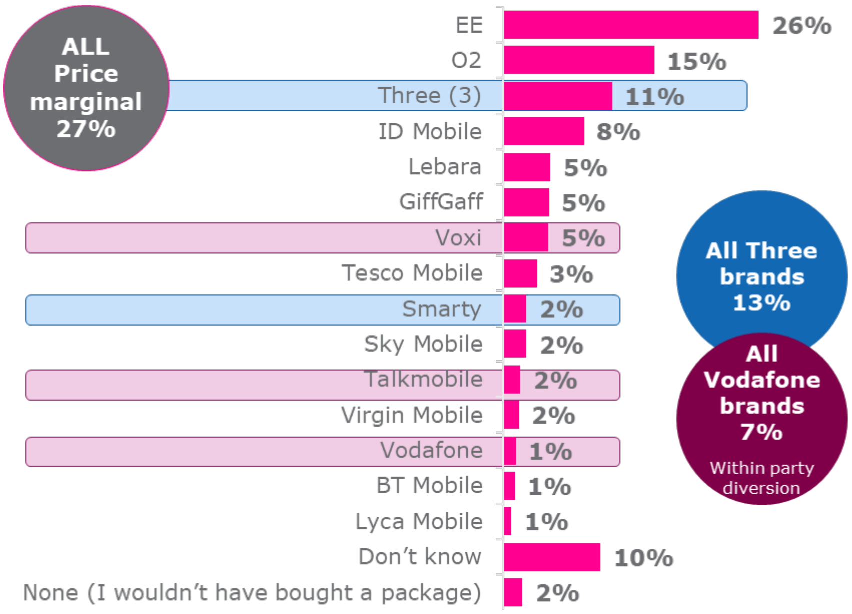
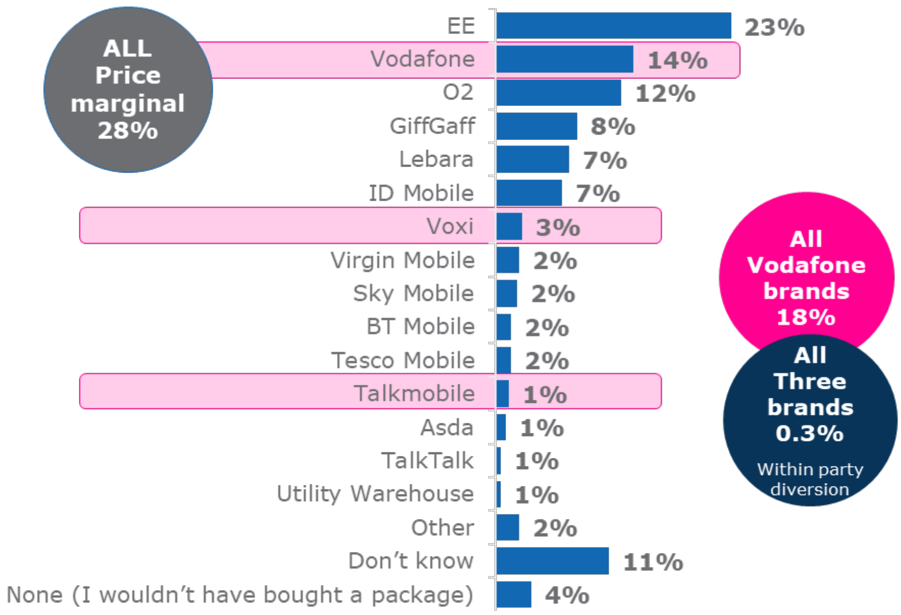


Figure 23: Second choice brand – Three price marginal customers



Source: Q10, Q11 and Q13 (see Source for Figures 12 and 13 and for Figures 10 and 11 above).**Base:** All Vodafone price marginal customers (n=192), all Three price marginal customers (n=226). N.B. All brands selected by <1% are not shown individually in the chart but are included in 'other'.

Diversion: quality marginal customers only

Note: in contrast to Figures 18 and 19, for the following two charts where a respondent said they would have 'not chosen a mobile phone package' (in response to a deterioration in network reliability) rather than being counted under 'none (I wouldn't have bought a package)' they are counted under the brand (or other response) they gave at the forced diversion question (i.e. the hypothetical scenario where their provider had ceased offering mobile phone services).

Figure 24: Second choice brand – Vodafone quality marginal customers

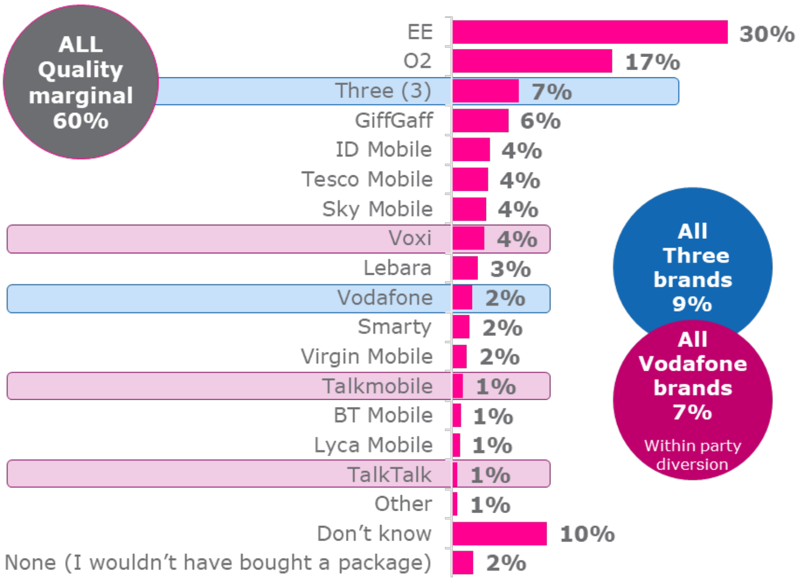
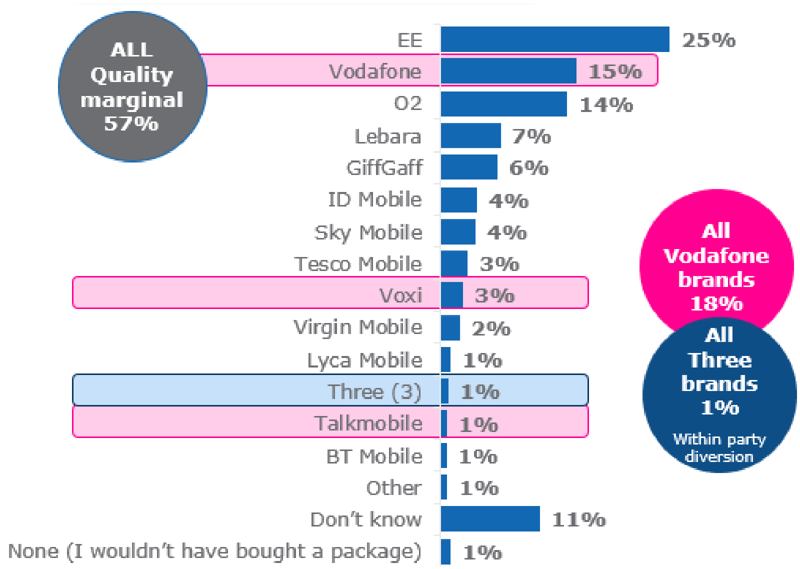


Figure 25: Second choice brand – Three quality marginal customers



Source: Q12 and Q13 (see Source for Figures 16 and 17 and for Figures 10 and 11 above).? **Base:** All Vodafone quality marginal customers (n=433), all Three quality marginal customers (n=460). N.B. All brands selected by <1% are not shown individually in the chart but are included in 'other'.

Email invite

£10 for your views on your mobile provider

Dear [NAME],

The Competition and Markets Authority (CMA), a government body, has asked DJS Research, an independent market research agency, to carry out a survey of <Vodafone/VOXI/Talk Mobile/Three (3)/ SMARTY>'s customers in relation to work it is doing associated with mobile phone use. By completing the survey, you will help the CMA to understand more about mobile phone users like you.

The survey is online and should take around 10 minutes to complete. If you are eligible for the survey after completing a few initial questions and go on to complete it, as a thank you for taking part, you will receive a £10 GiftPay voucher (an electronic voucher redeemable in a range of high street and online stores).

Before you click on the link, please read the important information further below about data protection.

Click here to go to the survey
(where further details about the £10 voucher are also provided).

The CMA will be very grateful if you are able to help (but taking part is completely optional). You can use a PC, laptop, tablet or smartphone to answer the survey, which will be available until 5th June 2024.

If you have any queries about the survey, please contact Rachel Hancock at DJS Research (or on 01663 767857) or the CMA.

djs research

More about the CMA, your personal data and data protection:

The Competition and Markets Authority (CMA), the UK's competition regulator, is responsible for ensuring that consumers, like you, get a good deal when buying goods and services and that businesses operate within the law. As part of this work, it often asks existing customers of specific companies to participate in important consumer research. You can find out more about the CMA's work here or, if you prefer, by going to GOV.UK and typing 'CMA' into the search bar.

The CMA has asked DJS Research to survey customers of <Vodafone/VOXI/Talk Mobile/Three (3)/ SMARTY> to assist with its work. To enable DJS Research to conduct the survey, <Vodafone/VOXI/Talk Mobile/Three (3)/ SMARTY> has provided them with the personal information of a sample of its customers, including you. If you think you may be a victim of error or fraud, we suggest you consult guidance available from <Vodafone/VOXI/Talk Mobile/Three (3)/ SMARTY> and follow their procedures for reporting fraud.

Further guidance on identity theft is also available from the Information Commissioner's Office (at https://ico.org.uk/for-the-public/identity-theft/). This suggests various actions you can take. In addition, further advice is available from Action Fraud (https://www.actionfraud.police.uk) and the Financial Ombudsman Service (https://www.financial-ombudsman.org.uk).

The CMA and DJS Research only are processing your personal data; our doing so is compliant with data protection law as set out in the UK GDPR and in the Data Protection Act 2018. We explain more about this below.

In legal terms, the purpose of the processing is in accordance with the CMA's powers under Parts 1 and 3 of the Enterprise Act 2002. The CMA's legal ground for processing your personal data is Article 6.1.(e) of the UK GDPR and section 8(c) of the Data Protection Act 2018, namely that it is necessary for the performance of a task carried out in the public interest or in the exercise of official authority. Although the survey itself is voluntary, because the CMA has statutory powers to process your personal data, this means the CMA does not need your consent to process your personal data under data protection law.

The CMA has used its legal powers under section 109 of the Enterprise Act 2002 to require <Vodafone/VOXI/Talk Mobile/Three (3)/ SMARTY> to share certain items of personal data relating to a sample of its customers, including you, for the purposes of conducting a survey and for subsequent statistical analysis. The personal information provided is the minimum required for the CMA's legal purposes, comprising: mobile phone number, name, e-mail address, age group, postcode, date of recognition on the provider's system, brand and date of purchase, type of contract and services provided, contract length, data allowance, along with information on the price of your deal with <Vodafone/VOXI/Talk Mobile/Three (3)/ SMARTY>.

If you follow the survey link, we will also be processing your IP address as it will be collected automatically when you enter the survey. If you do not want the CMA and DJS Research to process your IP address you should not follow the link to the survey. If you do complete the survey, your answers will be combined with answers from everyone else who completes the survey to provide statistical results. It will not be possible to identify you in any results that are published or passed to third parties. While the CMA's inquiry is ongoing, the CMA and DJS Research will continue to process your personal information securely at all times. Your personal information will be securely deleted on final determination of the CMA's case.

You can read more about how the CMA, as a controller, processes personal data (including the contact details for the CMA's Data Protection Officer (DPO), information about your rights in relation to your personal data, and details of how to exercise those rights, including how to complain to the Information Commissioner's Officer) in the CMA's Privacy Notice. You can find a link to this document (titled 'Personal information charter') here (or, if you prefer, you can go to the CMA's homepage via GOV.UK and follow the links to the 'About us' page).

How to contact us

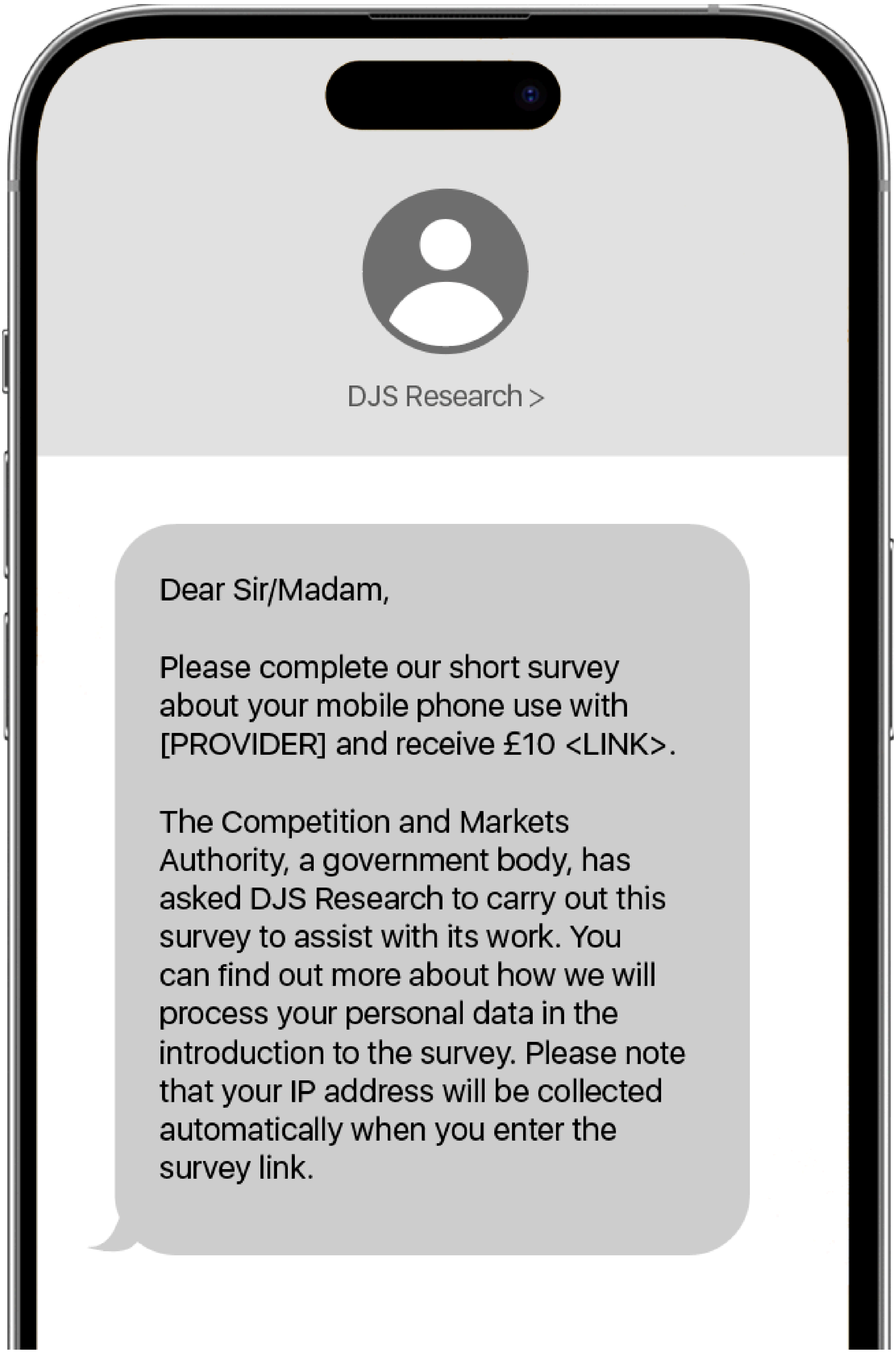
The data controller for your personal information is the CMA. You can contact our Data Protection Officer at dpo@cma.gov.uk.

DJS Research (the processor for your personal information) abides by the Market Research Society Code of Conduct, which means that all of your personal data will be kept secure and, should you participate in the research, they will share your survey responses only with the CMA. You can find further details on DJS Research's privacy policy at https://www.djsresearch.co.uk/about/terms.

If you have any queries about the survey, or anything else you've read here, you can contact Rachel Hancock at DJS Research (rhancock@djsresearch.com, or on 01663 767857). If you would like to confirm DJS Research's credentials, please call the Market Research Society's verification service for free on 0800 975 9596. Alternatively, you can get in touch with the CMA (onlinesurveyB@cma.gov.uk).

Thank you very much for your help.

SMS invite


DJS Research >
Dear Sir/Madam,
Please complete our short survey about your mobile phone use with [PROVIDER] and receive £10 <LINK>.
The Competition and Markets Authority, a government body, has asked DJS Research to carry out this survey to assist with its work. You can find out more about how we will process your personal data in the introduction to the survey. Please note that your IP address will be collected automatically when you enter the survey link.

Questionnaire: CMA Vodafone Three Merger: Customer List Survey (CLS)

Client name:	CMA
Project name:	Vodafone Three Merger
Job number:	9475
Methodology:	Online – Customer List Survey
Version	FINAL

Notes on this document

- Instructions in CAPS are for computer programming
- Instructions in *italics* are for telephone interviewers
- **Bold** or underlined words are for emphasis within a question
- Different question types have different numbers:
- Screener questions are labelled S01, S02, S03 etc.
- Main survey questions are labelled Q01, Q02, Q03 etc.
- Further demographic / classification questions are labelled C01, C02, C03 etc.
- Number codes are included on each question for data processing purposes

Introduction

DP NOTE: THROUGHOUT USE PARTY NAME (VODAFONE ETC. FROM SAMPLE)

The Competition and Markets Authority (CMA), a government body, has asked DJS Research, an independent market research agency, to carry out a survey about your mobile phone use with <Vodafone/VOXI/Talk Mobile/Three (3)/ SMARTY>.

It should take around 10 minutes to complete. If you qualify for the survey and complete it, as a thank you for taking part, you will receive a £10 GiftPay voucher (an electronic voucher redeemable in a range of high street and online stores).

Please note: to qualify for this survey you need to be aged 18+ and meet certain eligibility criteria (only the first few quick questions need to be answered to check if you qualify). Eligible participants who go on to complete the survey will receive a £10 GiftPay voucher. The survey will remain open until 5th June 2024.

Taking part in this survey is entirely voluntary.

Please see below for further information about the CMA, the processing of your personal data and data protection. Then, if you wish to take part, please click 'Next' to continue.

Next

DP NOTE: Make the following text smaller on screen.

About the CMA, your personal data and data protection

The CMA, the UK's competition regulator, is responsible for ensuring that consumers, like you, get a good deal when buying goods and services and that businesses operate within the law. As part of this work, it often asks existing customers of specific companies to participate in important consumer research. You can find out more about the CMA's work here or, if you prefer, by going to GOV.UK and typing 'CMA' into the search bar.

The CMA has asked DJS Research to survey mobile customers of <Vodafone/VOXI/Talk Mobile/Three (3)/ SMARTY> to assist with its work. To enable DJS Research to conduct the survey, <Vodafone/VOXI/Talk Mobile/Three (3)/ SMARTY> has provided them with the personal information of a sample of its customers, including you. If you think you may be a victim of error or fraud, we suggest you consult guidance available from <Vodafone/VOXI/Talk Mobile/Three (3)/ SMARTY> and follow their procedures for reporting fraud. Only the CMA and DJS Research are processing your personal data; our doing so is compliant with data protection law as set out in the UK GDPR and in the Data Protection Act 2018. We explain more about this below.

In legal terms, the purpose of the processing is in accordance with the CMA's powers under Parts 1 and 3 of the Enterprise Act 2002. The CMA's legal ground for processing your personal data is Article 6.1.(e) of the UK GDPR and section 8(c) of the Data Protection Act 2018, namely that it is necessary for the performance of a task carried out in the public interest or in the exercise of official authority. Although the survey itself is voluntary, because the CMA has statutory powers to process your personal data, this means the CMA does not need your consent to process your personal data under data protection law.

The CMA has used its legal powers under section 109 of the Enterprise Act 2002 to require <Vodafone/VOXI/Talk Mobile/Three (3)/ SMARTY> to share certain items of personal data relating to a sample of its customers, including you, for the purposes of conducting a survey and for subsequent statistical analysis. The personal information provided is the minimum required for the CMA's legal purposes, comprising: mobile phone number, name, e-mail address, age group, postcode, date of recognition on the provider's system, brand and date of purchase, type of contract and services provided, contract length, data allowance, along with information on the price of your deal with <Vodafone/VOXI/Talk Mobile/Three (3)/ SMARTY>. We are also processing your IP address as you have followed the link to the survey.

If you do complete the survey, your answers will be combined with answers from everyone else who completes the survey to provide statistical results. It will not be possible to identify you in any results that are published or passed to third parties.

2

While the CMA's inquiry is ongoing, the CMA and DJS Research will continue to process your personal information securely at all times. Your personal information will be securely deleted on final determination of the CMA's case.

You can read more about how the CMA, as a controller, processes personal data (including the contact details for the CMA's Data Protection Officer (DPO), information about your rights in relation to your personal data, and details of how to exercise those rights, including how to complain to the Information Commissioner's Officer) in the CMA's Privacy Notice. You can find a link to this document (titled 'Personal information charter') here (or, if you prefer, you can go to the CMA's homepage via GOV.UK and follow the links to the 'About us' page).

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If you have any queries about the survey, or anything else you've read here, you can contact Rachel Hancock at DJS Research (rhancock@djsresearch.com , or on 01663 767857). If you would like to confirm DJS Research's credentials, please call the Market Research Society's verification service for free on 0800 975 9596. Alternatively, you can get in touch with the CMA (onlinesurveyB@cma.gov.uk).

DP NOTES FOR ROUTING:

CONTRACT TYPE IN SAMPLE FILE	DYNAMIC TEXT THEY SHOULD SEE
PAYG (top-ups)	**RELATING TO PAYG:** e.g., pay-as-you-go (PAYG) package
PAYG+ (bundles)	**RELATING TO MONTHLY:** e.g., paying monthly, monthly mobile phone package
PAYM (monthly contract)	**RELATING TO MONTHLY:** e.g., paying monthly, monthly mobile phone package

Screening questions

S01.
Base: all respondents
Which age group do you fall into?
SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	Under 18 years		SCREEN OUT
2	18-24 years		
3	25-34 years		
4	35-44 years		
5	45-54 years		
6	55-64 years		
7	65-74 years		
8	75 years or over		
86	Prefer not to say		SCREEN OUT

S02.
Base: all respondents
We understand that you took out a new mobile phone package with <Vodafone/VOXI/Talk Mobile/Three (3)/SMARTY> recently and that you are <paying monthly / on a pay-as-you-go (PAYG) basis>. Is that correct?
SINGLE RESPONSE, ORDERED
DP NOTE: MOBILE PHONE PROVIDER AND TYPE OF CONTRACT DYNAMIC TEXT BASED ON SAMPLE

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No		SCREEN OUT

S03.
Base: all respondents
And do you pay the <monthly mobile phone package costs/pay-as-you-go (PAYG) costs> yourself?
SINGLE RESPONSE, ORDERED
DP NOTE: TYPE OF CONTRACT DYNAMIC BASED ON SAMPLE

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No		SCREEN OUT

S04.
Base: all respondents
Did you choose this mobile phone package yourself?
SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No		SCREEN OUT

SCREEN OUT TEXT: Thank you for your interest in this research. Unfortunately on this occasion, you do not meet the criteria for the survey.

INFO1.

Base: all respondents

You have now qualified for this survey, if you successfully complete the remaining questions, you will receive a £10 GiftPay Voucher.

Purchase

Q01.
Base: all respondents

Thinking about your current mobile phone package did you try to negotiate a better deal than the one you were first offered?
SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No		
85	Don't know		

Q02.
Base: those who tried to negotiate a better deal (Q01/1)

And did you manage to get a better deal than was originally offered by <Vodafone/VOXI/Talk Mobile/Three (3)/SMARTY>?

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No		
85	Don't know		

Q03.
Base: those who managed to negotiate a better deal (Q02/1)
And what was better about the new deal?
Please select all that apply.
MULTI RESPONSE, RANDOMISE

Code	Answer list	Scripting notes	Routing
1	Decreasing the cost of my package		
2	Increasing my free texts and/or minutes		
3	Adding an entertainment package		
4	Increasing my data allowance		
5	Upgrading my handset		
6	Changing the contract length (where applicable)		
80	Other (please specify)	TEXT RESPONSE, FIXED	
85	Don't know/can't remember	EXCLUSIVE, FIXED	

Q04.
Base: top-up pay as you go customers only (from sample) – PAYG ONLY
You said you have just taken out a pay-as-you-go (PAYG) deal with <Vodafone/VOXI/Talk Mobile/Three (3)/SMARTY>? Approximately how much do you expect to pay on average per month for the mobile phone services you will use?
Please give your best estimate to the nearest £1.
NUMERIC RESPONSE, MIN.1
DP NOTE: SHOW CURRENCY SIGN (£), DO NOT ALLOW DECIMAL PLACES

Code	Answer list	Scripting notes	Routing
85	Don't know	EXCLUSIVE	

Usage

INFO1a.
Base: all
This section asks some questions about your mobile phone usage. If you have more than one mobile phone for your personal use please think about the mobile phone you use most with <Vodafone/VOXI/Talk Mobile/Three (3)/SMARTY>.

Q05.
Base: all respondents
Is your mobile phone a smartphone?
A smartphone is a phone on which you can easily access emails, download files and apps, as well as view websites and generally search the internet.
SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No		
85	Don't know		

Q06.
Base: those with a smartphone (Q05/1)
Mobile phones can use either their provider's network (i.e. using your own data) or a Wi-Fi connection (e.g. when at home, work, someone else's home and in some public places for various purposes).

Which of the following do you do when using your provider's network service (i.e. when not on a WiFi connection and using your own data)?
Please select all that apply. ***Please do not include any of these if you ONLY do them when on WiFi.***
MULTI RESPONSE, RANDOMISE

Code	Answer list	Scripting notes	Routing
1	Make and/or receive voice calls		
2	Send, receive or read e-mail messages		
3	Browse the internet (e.g. read content, search fo something, look at pictures)		
4	Use instant messaging services (e.g. WhatsApp, Facebook Messenger, Snapchat, iMessage)		
5	Make or receive video calls (e.g. Teams, Zoom, Google meet, WhatsApp, Facetime etc)		
6	Listen to music, radio, e-books, podcasts		
7	Make contactless payments at point of sale/checkouts/rail or bus fares		
8	Watch 'live video' e.g., live sports events, concerts via TV channels, YouTube, Netflix etc.		
9	Play online games where speed is not important (e.g., Chess, Minecraft)	KEEP WITH CODE 10	
10	Play online games where speed is important (e.g., Valorant, Call of Duty)	KEEP WITH CODE 9	
80	Other (please specify)	TEXT RESPONSE, FIXED	
87	None of the above	EXCLUSIVE, FIXED	
85	Don't know	EXCLUSIVE, FIXED	

Choice factors

Q07.
Base: all respondents
Thinking back to when you took out your mobile phone package with <Vodafone/VOXI/Talk Mobile/Three (3)/SMARTY>, which of the following were reasons for choosing <Vodafone/VOXI/Talk Mobile/Three (3)/SMARTY>, rather than any other provider?
Please select all that apply.
MULTI RESPONSE, RANDOMISE

Code	Answer list	Scripting notes	Routing
1	Contract length		
2	Price		
3	Handset make/type/version		
4	Handset upgrade or availability		
5	Other services that formed part of the bundle		
6	Network speed		
7	Network reliability for voice calls		
8	Network reliability for uploading and downloading data		
9	Network coverage		
10	Network response speed for gaming		
11	Customer service (of <Vodafone/VOXI/ Talk Mobile/Three (3)/SMARTY>)		

12	Brand reputation (of <Vodafone/VOXI/ Talk Mobile/Three (3)/SMARTY>)		
13	Generous data allowance		
14	Having unlimited data		
15	Unlimited or high volume of texts		
16	Roaming costs		
17	Having free roaming in the EU (and possibly elsewhere)		
18	Perks/rewards/discounts/offers		
19	Good previous experience with this provider		
80	Other (please specify)	TEXT RESPONSE, FIXED	
85	Don't know/can't remember	EXCLUSIVE, FIXED	

Q08.
Base: all excluding those who don't know (excl. Q07/85) who select more than one code at Q07
And which of these was the single main reason for choosing <Vodafone/VOXI/Talk Mobile/Three (3)/SMARTY>?
Please select one answer.
SINGLE RESPONSE, RANDOMISE
DP NOTE: AUTOFILL FOR THOSE SELECTING ONE CODE AT Q07
FOR RANDOMISATION SHOW IN SAME ORDER AS Q07 IF POSSIBLE

Code	Answer list	Scripting notes	Routing
1	Contract length	ONLY SHOW IF SELECTED AT Q07	
2	Price		
3	Handset make/type/version		
4	Handset upgrade or availability		
5	Other services that formed part of the bundle		
6	Network speed		
7	Network reliability for voice calls		
8	Network reliability for uploading and downloading data		
9	Network coverage		
10	Network response speed for gaming		
11	Customer service (of <Vodafone/VOXI/Talk Mobile/Three (3)/SMARTY>)		
12	Brand reputation (of <Vodafone/VOXI/Talk Mobile/Three (3)/SMARTY>)		
13	Generous data allowance		
14	Having unlimited data		
15	Unlimited or high volume of texts		
16	Roaming costs		
17	Having free roaming in the EU (and possibly elsewhere)		
18	Perks/rewards/discounts/offers		
19	Good previous experience with this provider		
80	<PULL THROUGH OTHER FROM Q07>		
85	Don't know/can't remember	EXCLUSIVE, FIXED	

Q09.
Base: all respondents
Which, if any, of the following did you do before you chose <Vodafone/VOXI/Talk Mobile/Three (3)/SMARTY> as your mobile network provider?
Please select all that apply.
MULTI RESPONSE, RANDOMISE

Code	Answer list	Scripting notes	Routing
1	Asked for advice from family, friends or acquaintances		
2	Used a comparison website (e.g. Uswitch, Compare the Market)		
3	Looked at what was available on <Vodafone/VOXI/Talk Mobile/Three (3)/SMARTY>'s website	KEEP WITH CODE 4	
4	Discussed offers with <Vodafone/VOXI/Talk Mobile/Three (3)/SMARTY>'s staff (on the phone, online or in a store)	KEEP WITH CODE 3	
5	Looked at what was available on other providers' websites	KEEP WITH CODE 6	
6	Discussed offers with other providers' staff (on the phone, online or in a store)	KEEP WITH CODE 5	
80	Did something else *(please specify)*	TEXT RESPONSE, FIXED	
87	None of the above	EXCLUSIVE, FIXED	

Diversion questions

Q10.
Base: contract and hybrid PAYG customers only – PAYG+ AND PAYM

You said earlier that you are paying monthly with <Vodafone/VOXI/Talk Mobile/Three (3)/SMARTY>. <IF AIRTIME PRICE IN SAMPLE: <Vodafone/VOXI/Talk Mobile/Three (3)/SMARTY> have told us that you pay <£x from airtime price per month in sample> per month for the mobile phone usage/airtime.>

If, at the time you chose your monthly mobile phone package, the prices of <Vodafone/VOXI/Talk Mobile/Three (3)/SMARTY>'s mobile phone usage/airtime had been 10% more expensive <IF AIRTIME PRICE IN SAMPLE: , i.e. the price you would have had to pay for would have been approximately another <£x– calculate from price per month in sample> per month (and it was not possible to negotiate a better deal), but the prices offered by all other mobile network providers were unchanged, which of the following do you think you would have been most likely to have done:

Please select one answer.
SINGLE RESPONSE, ORDERED
DP NOTE: PRICE IN DYNAMIC TEXT CALCULATED FROM SAMPLE. IF AIRTIME COST KNOWN, 10% OF THIS.

9

Code	Answer list	Scripting notes	Routing
1	Chosen the same monthly mobile phone package with <Vodafone/VOXI/Talk Mobile/Three (3)/ SMARTY> and paid the higher price		
2	Chosen a different deal with <Vodafone/VOXI/ Talk Mobile/Three (3)/SMARTY>		
3	Chosen a different mobile network provider to <Vodafone/VOXI/Talk Mobile/Three (3)/SMARTY>		
4	Not chosen a new mobile phone package		
87	None of these (please specify what you would have done)	TEXT RESPONSE	
85	Don't know		

Q11.

Base: those on pre-pay top-ups only (from sample) excluding those who don't know what they expect to pay per month (excl. Q04/85) - PAYG

You said earlier that you have a PAYG package with <Vodafone/VOXI/Talk Mobile/Three (3)/SMARTY>.

If, at the time you chose your pay-as-you-go (PAYG) package, all the prices of <Vodafone/VOXI/Talk Mobile/Three (3)/SMARTY> had been 10% more expensive each month, i.e. the price you would have had to pay would have been approximately another <£x- calculate 10% from Q04> of top-up per month for the same amount of use, but the prices offered by other providers were unchanged, which of the following do you think you would have been most likely to have done?

Please select one answer.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	Chosen the same pay-as-you-go (PAYG) package with <Vodafone/VOXI/Talk Mobile/Three (3)/ SMARTY> and paid the higher price		
2	Chosen a different deal with <Vodafone/VOXI/ Talk Mobile/Three (3)/SMARTY>		
3	Chosen a different mobile network provider to <Vodafone/VOXI/Talk Mobile/Three (3)/SMARTY>		
4	Not chosen a new mobile phone package		
87	None of these (please specify what you would have done)	TEXT RESPONSE	
85	Don't know		

Q12.
Base: all respondents
If, at the time you chose this<monthly mobile phone package/pay-as-you-go (PAYG) package>, the network of <Vodafone/VOXI/Talk Mobile/Three (3)/SMARTY> was a bit less reliable, which of the following would you most likely have done?
Please select one answer.
SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	Chosen the same mobile phone package		
2	Chosen a different provider		
3	Not purchased a mobile phone package		
80	Something else (please specify what you would have done)	TEXT RESPONSE	
85	Don't know		

Q13.
Base: all respondents
If, when you chose your mobile phone package, <Vodafone/VOXI/Talk Mobile/Three (3)/SMARTY> had ceased offering mobile phone services, which mobile network provider would you have been most likely to have chosen instead?
Please select one answer.
SINGLE RESPONSE, RANDOMISE

Code	Answer list	Scripting notes	Routing
1	EE		
2	BT Mobile		
3	O2		
4	Three (3)	HIDE IF THREE CUSTOMER (FROM SAMPLE)	
5	Vodafone	HIDE IF VODAFONE CUSTOMER (FROM SAMPLE)	
6	Virgin Mobile		
7	Sky Mobile		
8	Tesco Mobile		
9	GiffGaff		
10	Voxi	HIDE IF VOXI CUSTOMER (FROM SAMPLE)	
11	Smarty		
12	Lebara		
13	Plusnet Mobile		
14	TalkTalk		
15	Talkmobile	HIDE IF TALK MOBILE CUSTOMER (FROM SAMPLE)	
16	ID Mobile		
17	Lyca Mobile		
18	Utility Warehouse		
80	Other (please specify)	TEXT RESPONSE, FIXED	
87	None (I wouldn't have bought a package)	FIXED, EXCLUSIVE	
85	Don't know	FIXED, EXCLUSIVE	

11

INFO2.
Base: all respondents

Please be assured that these questions are only hypothetical. <Vodafone/VOXI/Talk Mobile/Three (3)/SMARTY> has no plans to stop offering mobile phone services, to reduce their network reliability or to increase prices by 10%.

Demographics

D01.
Base: all respondents
Please select your gender.
SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	Male		
2	Female		
80	Other	TEXT RESPONSE	
86	Prefer not to say		

D02.
Base: those who do not have postcode in the sample
Where do you live?
SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	England		
2	Scotland		
3	Wales		
4	Northern Ireland		
80	Other (please specify)	TEXT RESPONSE	
86	Prefer not to say		

D03.
Base: those who do not have postcode in the sample and who live in England (D02/1)
Which region of England do you live in?
SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	North East		
2	North West		
3	Yorkshire and The Humber		
4	East Midlands		
5	West Midlands		
6	East of England		
7	London		
8	South East		
9	South West		
86	Prefer not to say		

D04.
Base: those who do not have postcode in the sample

What is the first part of your postcode? Please provide the first half plus the number from the second half.

For example, if your postcode was HP9 2HR, you would enter HP9 2.

OPEN RESPONSE
DP NOTE: ADD LOGIC TO CHECK VALID POSTCODE

Code	Answer list	Scripting notes	Routing
86	Prefer not to say	EXCLUSIVE	

D05.
Base: all respondents
Which of the following best describes the area you live in?
SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	City centre or outskirts		
2	Town		
3	Rural		

D06.
Base: all respondents
The CMA may wish to contact you to ask further questions about your responses to this survey. If you're happy for them to do so, please provide a contact telephone number.
NAME:
TELEPHONE:

Code	Answer list	Scripting notes	Routing
87	I do not wish to be recontacted	EXCLUSIVE	

INCENTIVE

C01.
Base: those who complete the survey and have an email address
Could you please confirm these details are correct so that we can send you a £10 GiftPay voucher.
[PLEASE POPULATE EMAIL NAME AND ADDRESS FROM SAMPLE]
Name: OPEN
Email address: OPEN

Code	Answer list	Scripting notes	Routing
1	Yes		THANK & CLOSE
2	No		C02

13

C02.

Base: all saying no at C01 (C01/2)

Could you please re-enter the correct details below.

Name: OPEN

Email address: OPEN

C03.

Base: those who complete the survey and who do not have an email address in the sample.

Please provide your details so that we can send you a £10 GiftPay voucher.

Name: OPEN

Email address: OPEN

That is the end of the survey. Thank you very much for your time. You will receive a £10 GiftPay voucher within five working days via email.

For more information

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