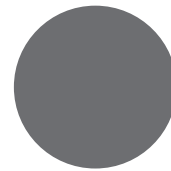
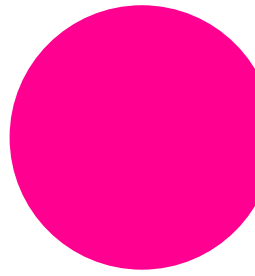
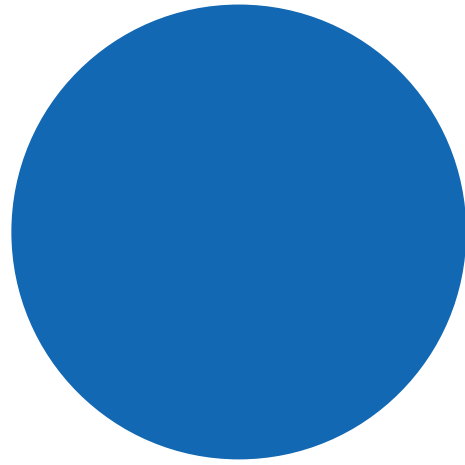


Prepared for:



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# Vodafone/Three Merger Inquiry: UK population survey

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June 2024

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# 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 a nationally representative sample of UK adults aged 18+ between May 16<sup>th</sup> and June 5<sup>th</sup> 2024 using a 'push-to-web' approach. The other survey was conducted with a sample of Vodafone's and Three's customers (the Customer list survey) and the findings from this are presented in a separate report.

### Sample source and design

To achieve a UK-representative sample of adults aged 18+ via postal invitations, DJS Research selected 10,000 residential addresses from Royal Mail's Postcode Address File (PAF), using a stratified random probability sample method.

To ensure the sample selection was representative of UK households, the total PAF database (excluding commercial addresses) was divided into strata based on region/nation, IMD quintiles and broad rural/urban classification.

DJS Research then randomly selected the number of properties required from within each stratum, giving every property the same chance of being selected.

### Research design

DJS worked with the CMA to finalise the questionnaire.

The questionnaire and survey invitation were cognitively tested via 10 telephone interviews, to gather feedback and test understanding. Cognitive testing focussed on ensuring questions could be easily understood and that all options were included in pre-coded lists, with a particular focus on:

- Checking that respondents could identify what type of mobile phone package they currently have
- Respondents' understanding of the difference between using their phone on Wi-Fi vs. their network connection/data
- Obtaining feedback on the choice factor questions
- Whether the invitation letter and survey itself were clear and engaging, including checks on whether the routing instructions on the paper survey were understood.

Following the cognitive testing, which showed that respondents tend to be well-informed about mobile phone packages, minor tweaks were made to the wording of some questions and answer codes for extra clarity.



## Push-to-Web approach

Survey invitations were sent to the 10,000 UK households randomly selected from the PAF. Invitations gave all individuals the choice of completing the survey on paper or online:

- A link to the online survey, as well as a QR code, was provided on the survey invitation. Unique login details were also provided, allowing DJS Research to track survey responses and ensure only one completion per household.
- A paper survey and a pre-paid envelope were also provided as an alternative to completing the survey online.

To increase accessibility and inclusivity further, respondents with reading or language difficulties were offered the option of completing the survey via telephone (in up to 8 other languages<sup>1</sup>).

A survey helpline, bespoke email address and webpage were also available to participants.

The survey averaged around 7 minutes in length, and a £10 voucher was offered to incentivise participation.

To qualify for the survey, a respondent had to be aged 18+, own a mobile phone, and pay for a mobile phone package that they had chosen themselves. They also had to know the type of mobile phone package they were currently on and who their current provider was.

If more than one person in the household was eligible for the survey, households were asked to select the person whose birthday was next.

After the initial invite (enclosing the paper questionnaire) one reminder was sent (without the paper questionnaire). Sufficient complete responses were received without the need for a further reminder.

The survey materials used are provided at the Appendix at the end of this report. In this report, the question numbers that are referred to at each chart align with the question numbers used in the online survey, so readers should refer to the online questionnaire.

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<sup>1</sup> Welsh, Polish, Romanian, Urdu, Panjabi, Spanish, Portuguese, Bengali





## Sample breakdown and response rate

Eight hundred valid responses were received – 527 via the online survey and 273 via post. The overall response rate achieved was 8.7%, obtained from the 10,000 postal invitations and an eligibility rate of 92%. Sixty-five respondents were ineligible, mainly due to respondents not paying the costs of using their personal mobile phone or not providing a valid answer to a screening question.

**Table 1:** Breakdown of sample & response rate

	<b>Number</b>
Invites issued	10,000
Surveys completed	800
<b>Screen outs (ineligible)</b>	<b>65 (8%)</b>
Under 18	3 (0.3%)
No mobile phone for personal use	6 (0.7%)
Does not pay costs of using personal mobile phone	22 (2.6%)
Did not choose mobile phone package	9 (1%)
Other (e.g. 'Don't know' or 'Prefer not to say' at screener questions)	25 (2.9%)
Eligibility rate (Number of completes/ (number of completes+ screen outs))	92%
<b>Response rate*</b>	<b>8.7%</b>

\*Response rate = number of completes / (number of invites x eligibility rate)

**Table 2:** Survey completion

<b>Methodology</b>	<b>Number completed</b>	<b>Proportion of completed surveys</b>
Online surveys completed	527	66%
Paper surveys completed	273	34%

## Analysis

All results presented in this report are based on data weighted to the UK adult population aged 18+ unless stated otherwise. Therefore, the weighted survey findings may be considered to be estimates for this wider population of individual consumers.<sup>2</sup>

<sup>2</sup> And subject to sampling error along with other types of survey error.



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## Approach to weighting

The interviewed sample was a close match to the profile of the UK adult population aged 18+. Corrective weights have been applied to the data ensuring parity with the profile of the UK adult population aged 18+. The data has been weighted by: age within gender; region/nation; rurality, and IMD.<sup>3</sup>

---

<sup>3</sup> Iterative rim weighting has been applied to the following (non-interlocking) marginal totals: age and gender (6 categories – male aged 18-34, female aged 18-34, male aged 35-64, female aged 35-64, male aged 65+, female aged 65+); Region (12 categories – 9 English regions plus 3 other home nations); IMD quintiles (5 categories); and urban/rural (2 categories).

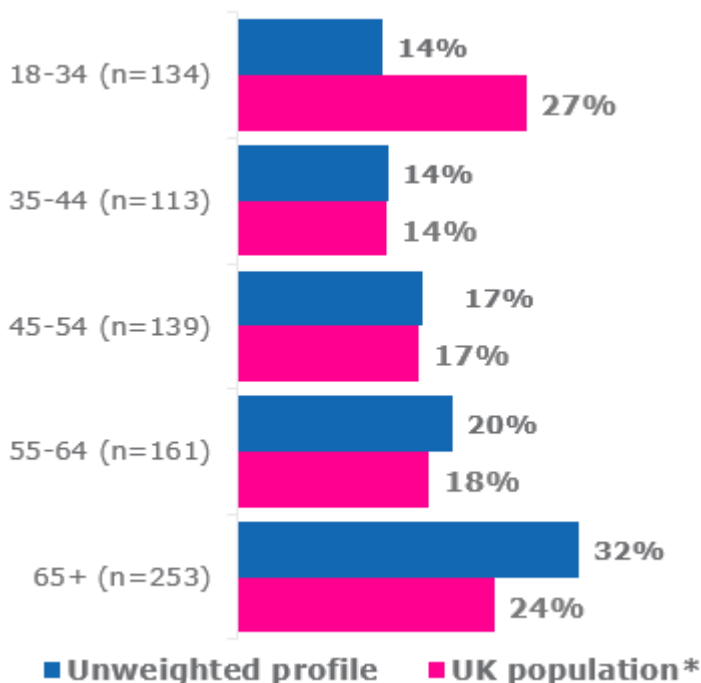


## Demographics

The following charts provide an overview of the demographic breakdown of the survey respondents. In each chart, the unweighted survey responses are compared with the profile of the UK population aged 18+, based on the latest available population estimates. This is provided in order to place the responses in context and has not been used for analysis purposes.

Overall, a good spread of respondents was achieved by age and gender, with some under-representation in the youngest age group. This has been corrected by weighting the data by age within gender to the UK population.

### Age

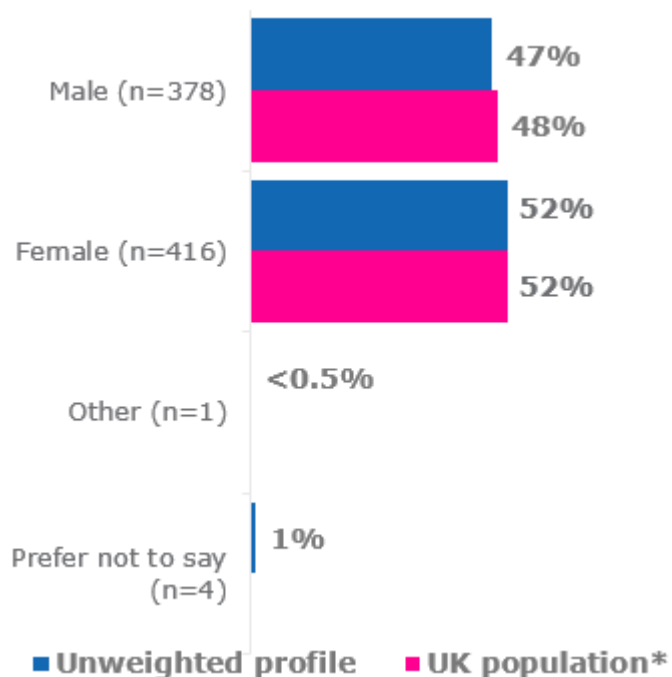


**Source:** S01. What age group do you fall into?

**Base:** all respondents (n=800). \* Based on ONS mid-year estimates (26th March 2024)



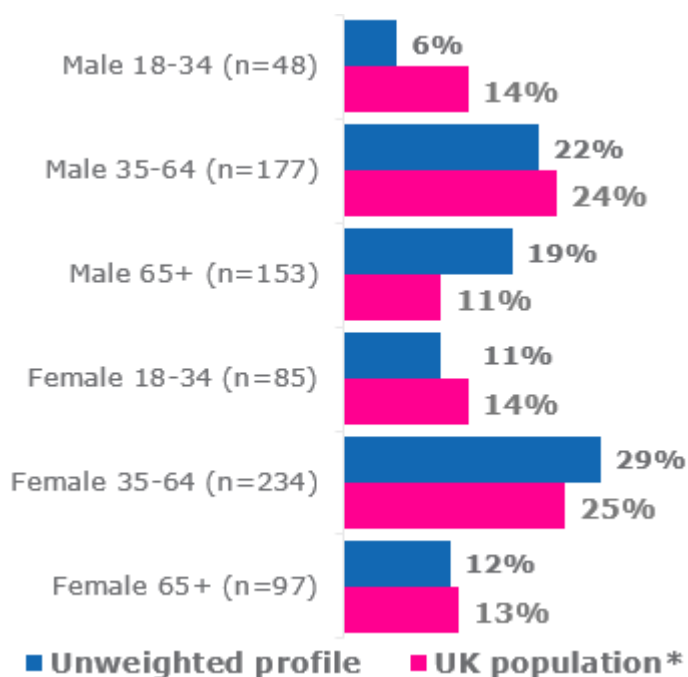
## Gender



**Source:** D01. Please select your gender.

**Base:** all respondents (n=800). \* Based on ONS mid-year estimates (26th March 2024)

## Gender by age



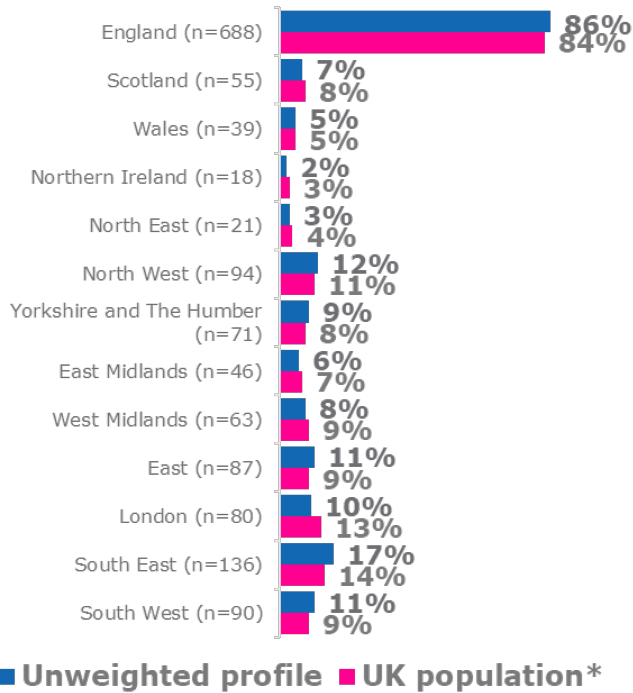
**Source:** S01. What age group do you fall into? D01. Please select your gender.

**Base:** all respondents (n=800). \* Based on ONS mid-year estimates (26th March 2024)



The sampling approach and research methodology also achieved a good spread of response by region/nation, rurality and IMD. The achieved sample has been weighted by these variables to correct for slight variances.

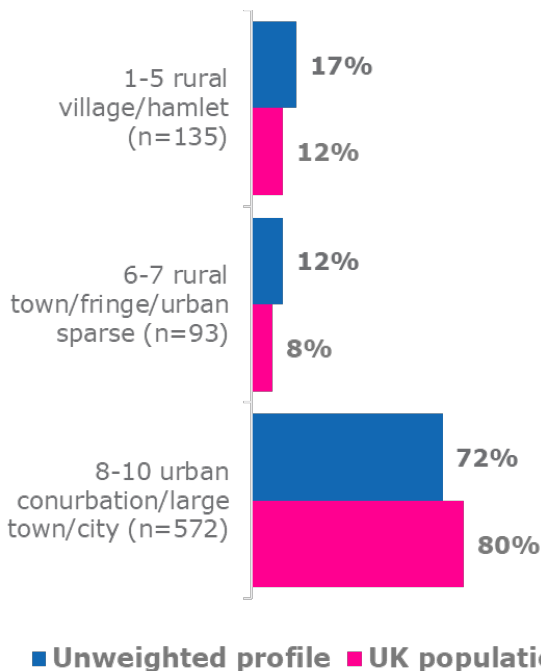
## Region



**Source:** IMD, region and setting are derived from postcode data (n=800).

\* Based on ONS mid-year estimates (26th March 2024)

## Setting

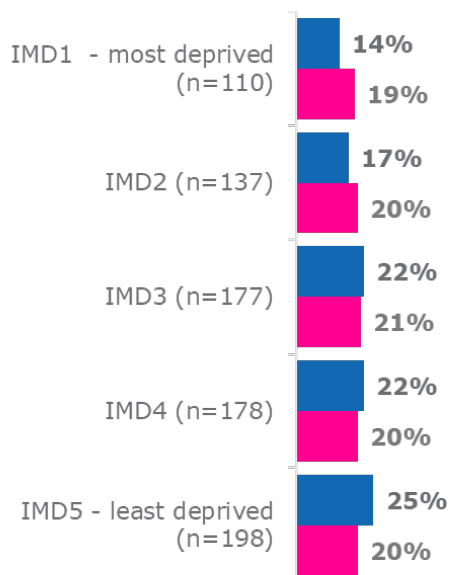


**Source:** IMD, region and setting are derived from postcode data (n=800).

\* Based on ONS mid-year estimates (26th March 2024)



## IMD



■ Unweighted profile ■ UK population\*

**Source:** IMD, region and setting are derived from postcode data (n=800).

\* Based on ONS mid-year estimates (26th March 2024)

The weighting efficiency for the weight to the UK population is 80.29%. An efficiency score greater than 70% is deemed to be fit for purpose.



## 2 Summary of key findings

### **Purchase of mobile phone package**

#### **Negotiating a mobile phone package**

In connection with their current mobile phone package, respondents were asked if they had ever tried to negotiate a better deal than the one they were first offered. Four in ten had tried to negotiate a better deal than the first one they were offered. Of these, around three-quarters were successful in their negotiations.

The most common outcome of successful negotiations 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 surveyed had a smartphone (97%).

#### **Usage of network service**

Network data was mostly used for voice calls, instant messaging services, browsing the internet and emails. While around one in four played online games, less than one in ten used their provider's network service to play online games where speed is important.

### **Choice factors**

#### **Choice factors**

The single main reason for choosing a current provider was price/discounts (46%), compared with 13% who chose their current provider based on a network-related reason.

#### **Influencing factors on choice of new provider**

Price/discounts (55%) were also more likely to be the main consideration if respondents were to choose a new provider (vs. 18% that would consider network factors).

Around half of respondents would look at what is available on different providers' websites, and/or would use a comparison website, before choosing a new provider in the next month.

#### **Willingness to pay more**

15% of respondents said they would pay more for a faster network connection. 33% of respondents said they would pay more for a more reliable connection.



# 3 Survey results

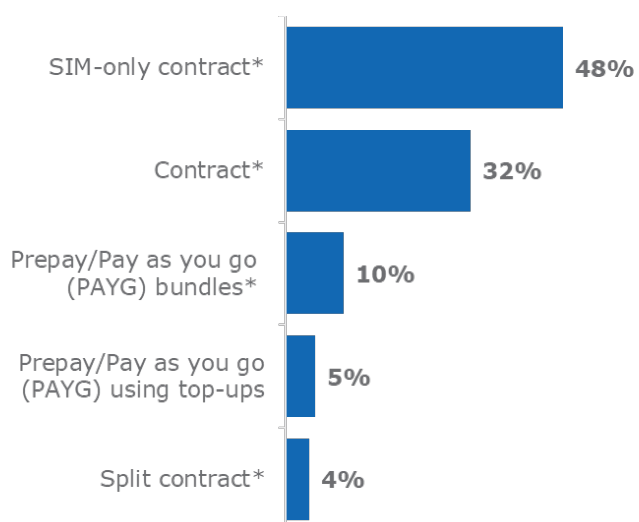
## Package type & provider

### Current mobile phone package

Nearly half of respondents indicated they are on SIM-only contracts, and around a third indicated they are on a contract that included the cost of their handset and usage/airtime.

Where respondents indicated they are on a monthly contract, in the majority of cases no other services are included.

**Figure 1: Current mobile phone package**



**Source:** S05. Which of the following best describes the mobile phone package that you use?

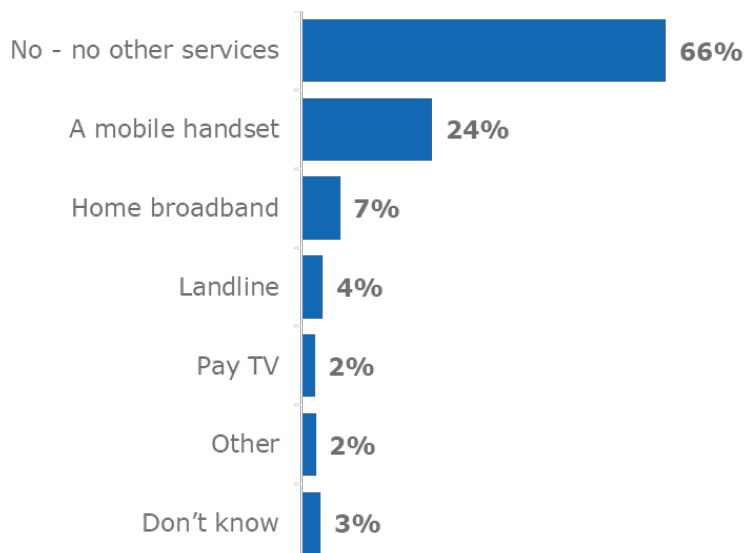
**Base:** all respondents (n=800).

\* Full code descriptions: Contract (which includes the cost of your handset and for usage/airtime); Split contract (separate contracts for your handset and your usage/air-time); SIM only contract (you only pay for usage/airtime); Prepay/Pay as you go (PAYG) bundles (texts, minutes and data allowance lasting 30 days, no contract but rolls-over unless cancelled)





**Figure 2: Services included in monthly contract**



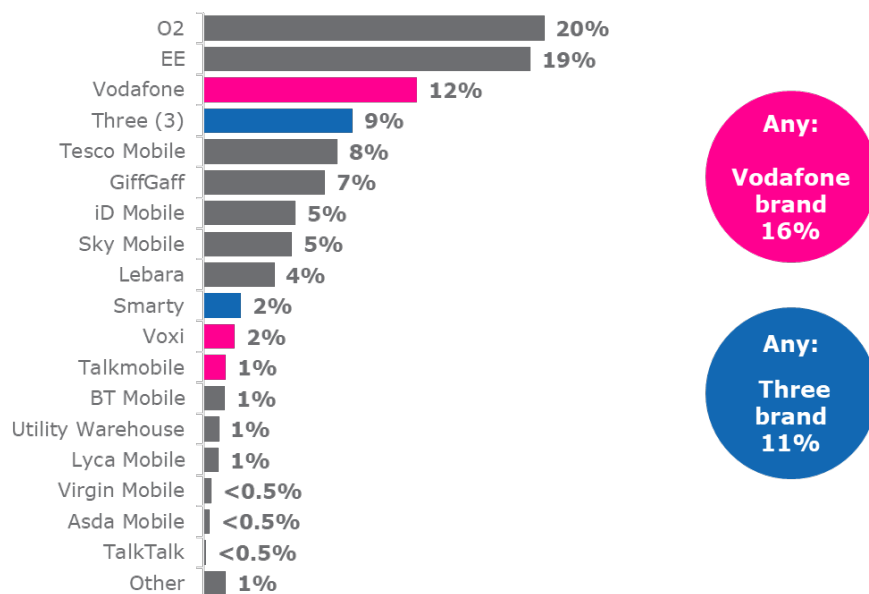
**Source:** S06. If your mobile phone package is part of a monthly contract, are there any other services that you get included in your contract?

**Base:** all respondents in a contract (n=682).

### Current mobile network provider

Around one in five respondents said their current provider is O2 or EE. Vodafone and Three brands are the next most used brands<sup>4</sup>.

**Figure 3: Current mobile network provider**



**Source:** S08. Which mobile network provider are you with for your mobile phone?

**Base:** All respondents (n=800).

<sup>4</sup> Vodafone brands include Vodafone, Voxi and Talkmobile. Three brands include Three (3) and Smarty.



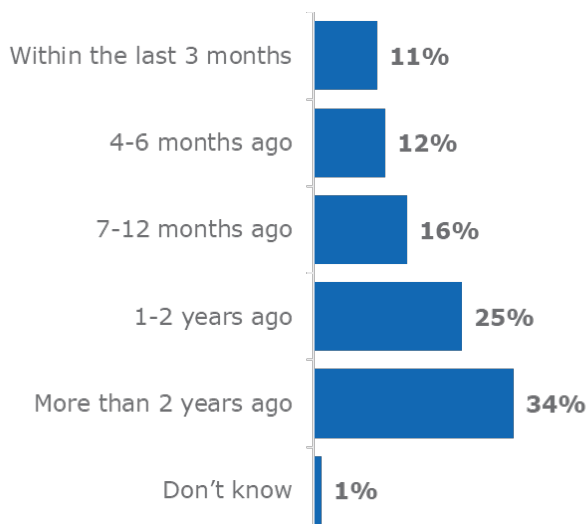
## Purchase

### Current mobile phone package

Over half of respondents purchased their current mobile phone package at least a year ago.

Half were already using the provider immediately before their current package, while a third had switched to that provider for the first time.

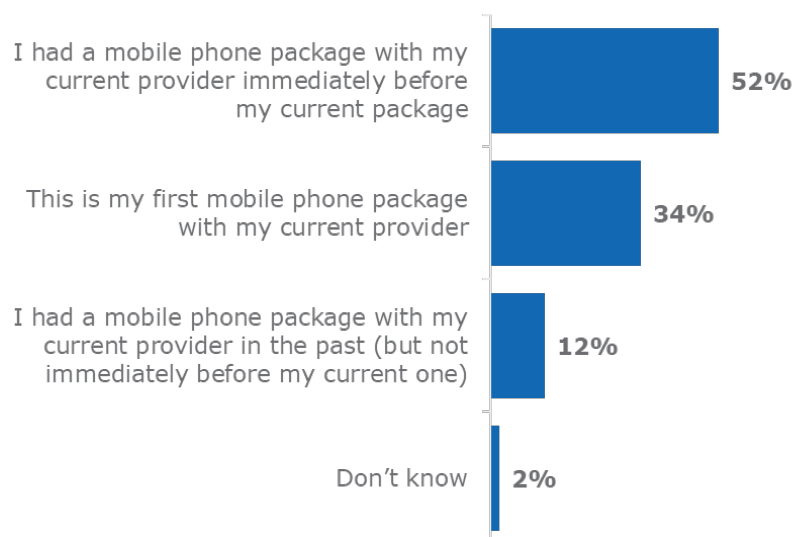
**Figure 4: When current mobile phone package was purchased**



**Source:** Q01. When did you purchase your current mobile phone package from your current provider?

**Base:** all respondents (n=793).

**Figure 5: Is this your first mobile phone package with your current provider?**



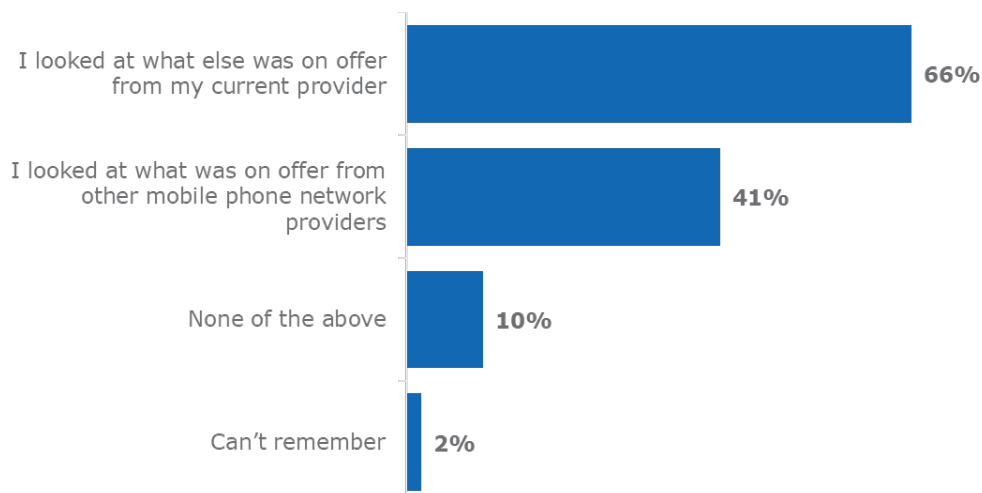
**Source:** Q02. And is it your first mobile phone package with your current provider, or have you had one with them before?

**Base:** all respondents (n=793).



Of those already with their current provider immediately before taking out their current package, two-thirds had looked at what else was on offer from that provider. Less than half had looked at offers from other network providers.

**Figure 6: Action taken before taking out current package**



**Source:** Q03. Before you took out your current package, which of the following did you do? Please select all that apply.

**Base:** those whose package immediately before the current one, was with the same provider (n=430).

### Negotiating a deal

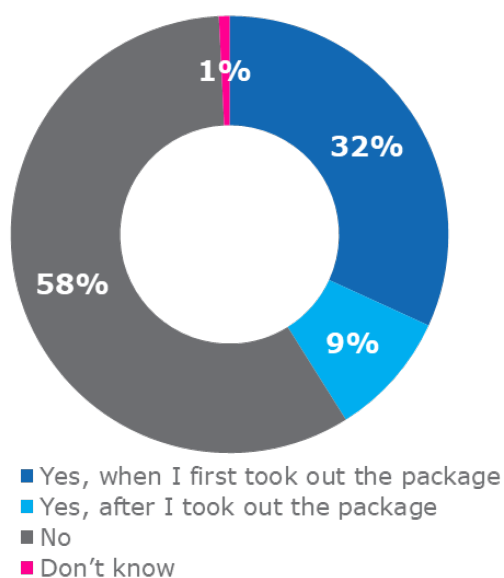
In connection with their current mobile phone package, respondents were asked if they had ever tried to negotiate a better deal than the one they were first offered. Less than half (41%) had tried to negotiate a better deal than the package first offered.

Around three-quarters of those who tried to negotiate a better deal said they were successful.

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. The second most common outcome was to increase the data allowance of the package.



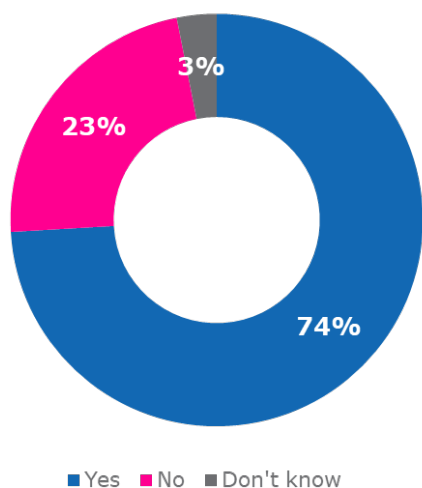
**Figure 7: Attempt to negotiate a better deal**



**Source:** Q04. Thinking about your current mobile phone package, have you ever tried to negotiate a better deal than the one you were first offered?

**Base:** all respondents (n=793).

**Figure 8: Success in negotiating a deal**

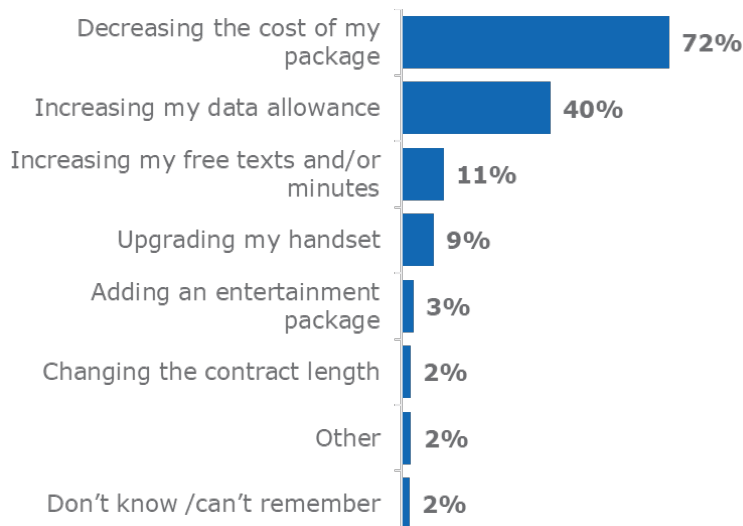


**Source:** Q05. And did you manage to get a better deal than was originally offered by your current provider?

**Base:** those who tried to negotiate a better deal (n=324).



**Figure 9: Advantages of the new deal**



**Source:** Q06. And what was better about the new deal? Please select all that apply.

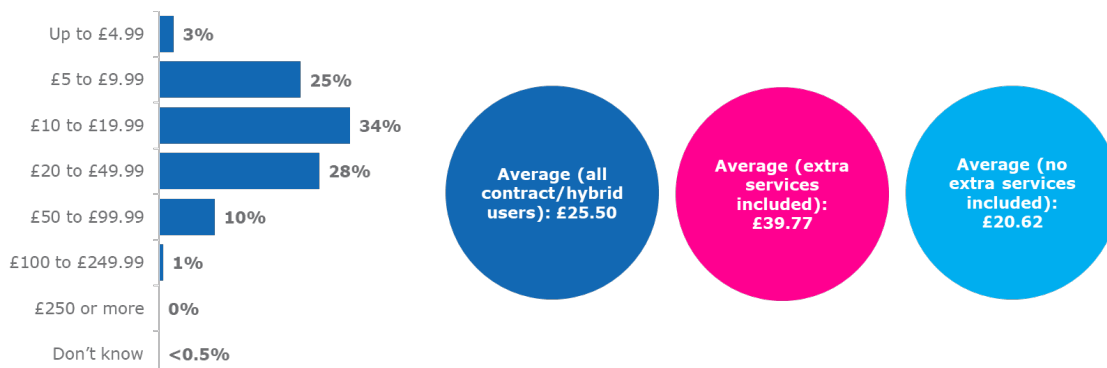
**Base:** those who managed to negotiate a better deal (n=246).

### Monthly cost

Those respondents who had previously said they were on a contract or a hybrid package that rolls over unless cancelled were then asked about the regular cost of their mobile phone package. Based on the survey responses, the average monthly cost for a mobile phone package for contract/hybrid users is £25.50.

The average cost increases to £39.77 when any extra services are included and falls to £20.62 among respondents who do not have any extra services as part of their contract.

**Figure 10: Monthly costs for phone package**



**Source:** Q07. We are now going to ask you about the cost of your mobile phone package. Roughly how much do you pay each month for your mobile phone package? If you have said that your current provider provides you with a handset/landline/broadband as well as for the mobile phone service, then please include the cost of the entire package when answering.

**Base:** contract/hybrid users (n=739 overall / n=206 with extra services and n=438 no extra services).



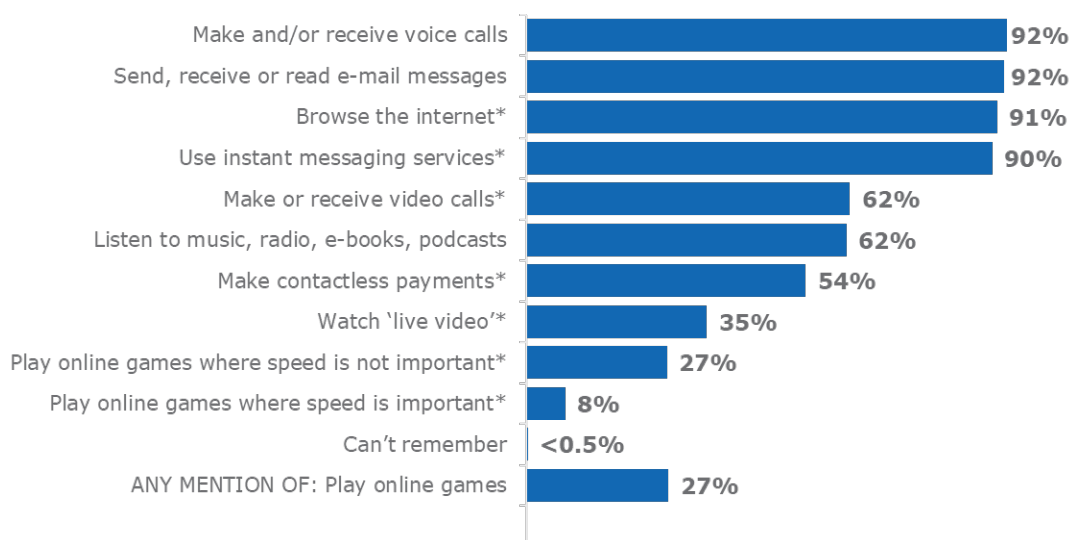
## Smartphone usage

### Network usage on smartphones

When asked if their mobile phone is a smartphone, the vast majority said yes (97%).<sup>5</sup>

Those with a smartphone were asked which activities they do when using their providers' network service (as opposed to being on WiFi). The most common use of network data is for voice calls, instant messaging, browsing the internet and emails. Around one in four play online games, and around one in thirteen use their provider's network to play online games where speed is important.

**Figure 11: Usage of network services**



**Source:** Q09. 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). Still thinking about your main mobile phone (the one you use most), which of the following do you ever do when using your provider's network service (i.e. when using your own data and not on a WiFi connection)? Please select all that apply, but do not include any of these if you ONLY do them when on WiFi.)

**Base:** those with a smartphone (n=765).

\* 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)

<sup>5</sup> **Source:** Q08. Is your mobile phone a smartphone?

**Base:** all respondents (n=799).



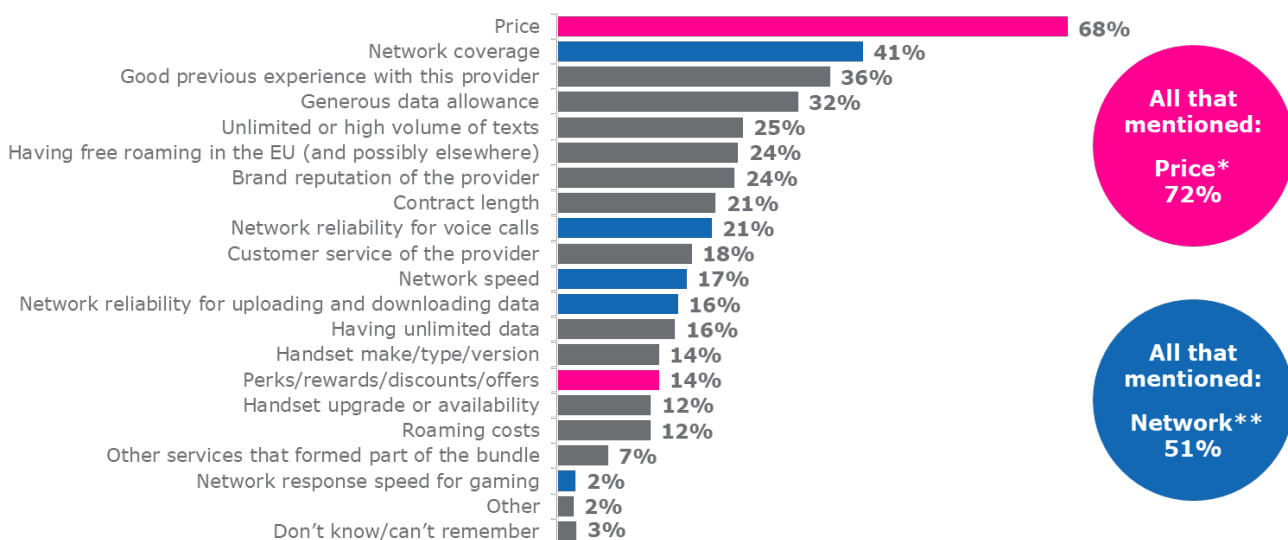
## Choice factors

### 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 their mobile phone provider was price: nearly three-quarters of respondents chose their current provider because of price or perks/discounts, among other reasons. Around half chose their current provider for reason(s) relating to network quality, including network speed, coverage, reliability, etc.

**Figure 12: Reasons for choosing provider**



**Source:** Q10. Thinking back to when you took out your mobile phone package with your current provider or when you last renewed your mobile phone package with them, which of the following were reasons for choosing your current provider, rather than any other alternative mobile network providers? Please select all that apply.

**Base:** all respondents (n=773)

\*Price = 'Price' + 'Perks/rewards/discounts/offers'

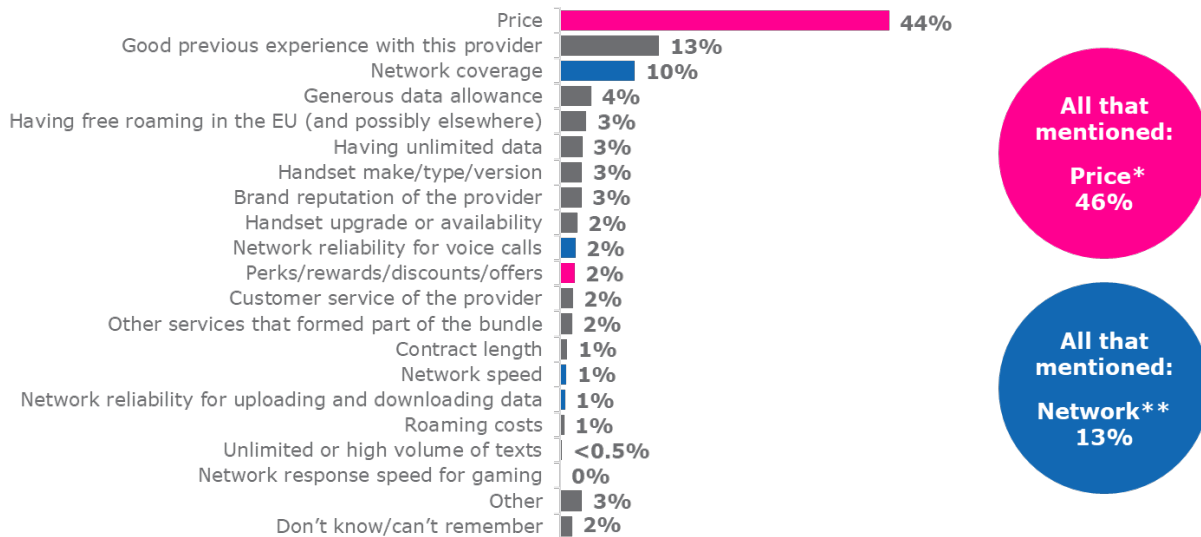
\*\*Network = 'Network coverage', 'Network reliability for voice calls', 'Network speed', 'Network reliability for uploading or downloading data' and/or 'Network response speed for gaming'

### Reason for choosing current provider (single-response)

When asked to select the single main reason for choosing their current provider, respondents were most likely to cite price. Mention of any network-related reasons came a distant second.



**Figure 13: Main reason for choosing a provider**



**Source:** Q11. And which of these was the single main reason for choosing your current provider? Please select one option only.

**Base:** all respondents (n=718).

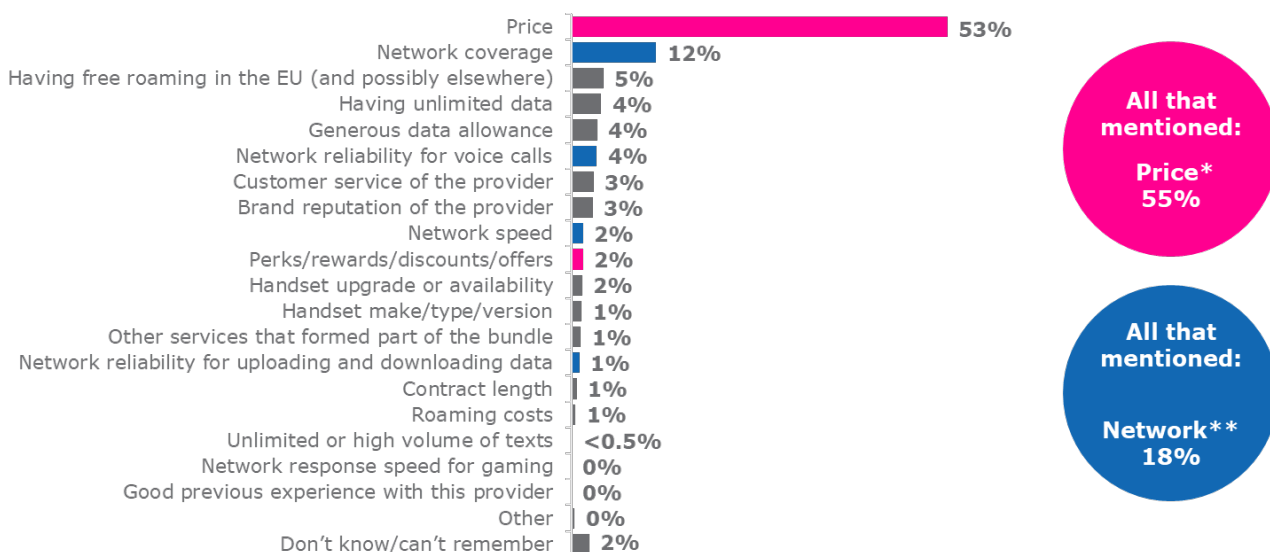
\*Price = 'Price' + 'Perks/rewards/discounts/offers'

\*\*Network = 'Network coverage' + 'Network reliability for voice calls' + 'Network speed' + 'Network reliability for uploading or downloading data'

### Main factor were they to choose a provider next month

Respondents were asked which of the following factors would be their main consideration if they had to choose a new mobile network provider in the next month. Around half of respondents cited price would be their main consideration. In contrast, less than a fifth cited network-related reasons would be their main consideration.

**Figure 14: Main reason for choosing provider in the next month**



**Source:** Q12. Which of the following would be your main consideration if you had to choose a new mobile network provider in the next month? Please select one option only.

**Base:** all respondents (n=745).

\*Price = 'Price' + 'Perks/rewards/discounts/offers'

\*\*Network = 'Network coverage' + 'Network reliability for voice calls' + 'Network speed' + 'Network reliability for uploading or downloading data'

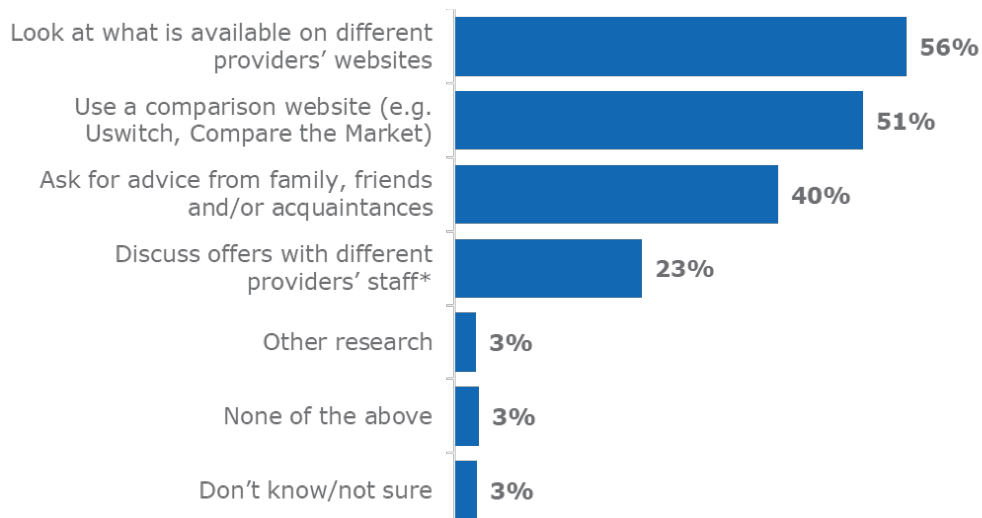




## Actions to take before deciding on a new provider

Respondents were asked, 'And if you were having to choose a new mobile network provider in the next month, which of the following actions would you be likely to take before deciding on that provider?' In response, around half of respondents said they would look at what is available on different providers' websites, and/or would use a comparison website.

**Figure 15: Actions likely to take before deciding on new provider**



**Source:** Q13. And if you were having to choose a new mobile network provider in the next month, which of the following actions would you be likely to take before deciding on that provider? Please select all that apply.

**Base:** all respondents (n=794).

\* Full code description: Discuss offers with different providers' staff (on the phone, online or in a store).

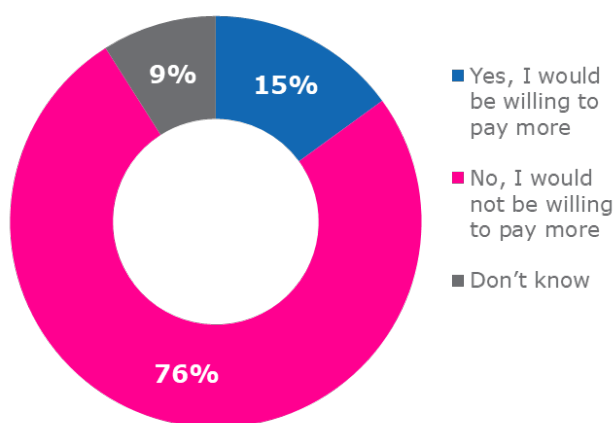


## Willingness to pay more for a faster or more reliable network connection

Respondents were asked if they would be willing to pay more than they do now for a faster network connection when they next make a decision about choosing a mobile network provider. Around one in seven respondents said they would be willing to pay more for a faster network connection.

Respondents were also asked if they would be willing to pay more than they do now for a more reliable network connection when they next make a decision about choosing a mobile network provider. A third of respondents said they would be willing to pay more for a more reliable network connection.

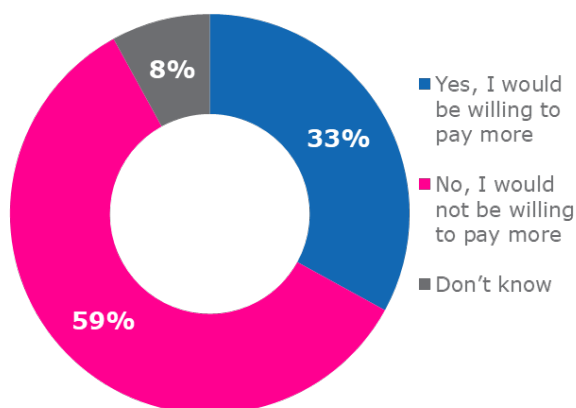
**Figure 16: Willing to pay more for a faster network connection**



**Source:** Q14. When you next make a decision about choosing a mobile network provider, would you be willing to pay more than you do now for a faster network connection?

**Base:** all respondents (n=793).

**Figure 17: Willing to pay more for a more reliable network connection**



**Source:** Q15. And would you be willing to pay more for a more reliable network connection?

**Base:** all respondents (n=793).



---

# 4 Appendix



# Survey invitation letter



May 2024

Address 1  
Address 2  
Address 3  
Postcode

Receive a  
**£10 voucher** for  
completing  
a short survey!



You are invited to share your views in a short survey to help inform key decisions that may impact mobile phone users like you. The survey should take **less than 10 minutes** and can be completed on paper or online.

The Competition and Markets Authority (CMA), a government body, needs to hear from as many mobile phone users as possible. By participating in the survey you will help the CMA with important work it is doing related to consumer protection in the mobile phone market.

**Please complete the online or paper questionnaire as soon as possible.**

After answering a few initial questions to check you are eligible, if you return your completed survey (online or in the post) **by Wednesday 5th June** you will receive a **£10 GiftPay voucher**, that can be used in a range of high street and online stores, as a thank you for your time.

If there is more than one individual in your household that meets the eligibility criteria, we suggest you ask the person whose birthday it is next to complete the survey (only one response per household is permitted).

**Thank you in advance for your help.**

Yours sincerely,

Julie Hollingsworth,  
Associate Director at DJS Research

There are two quick & easy ways to take part:

### Online



1. Scan the QR code or visit:  
[www.cmamobilesurvey.co.uk](http://www.cmamobilesurvey.co.uk)

2. Enter your unique reference code & password:

Ref code:   
Password:

3. Fully complete the survey by 5th June & receive your £10 voucher!



### Post

1. Complete the paper questionnaire enclosed



2. Return it in the reply-paid envelope (free of charge) before the 5th June



3. Receive your £10 voucher!



**We will send a £10 GiftPay voucher for each survey returned by 5th June 2024** (one per household).



## Further information

### Why have you received this survey?

The Competition and Markets Authority (CMA), a government body, has asked DJS Research, an independent market research agency, to carry out a survey in relation to important work it is doing associated with mobile phone use.

Your address has been randomly selected from the Postcode Address File (Royal Mail's database of all addresses in the UK).

More information about the CMA can be found on their website:  
[www.gov.uk/government/organisations/competition-and-markets-authority](http://www.gov.uk/government/organisations/competition-and-markets-authority)

### What does the survey involve?

The survey should take less than 10 minutes. **It can be completed online** (by going to [www.cmamobilesurvey.co.uk](http://www.cmamobilesurvey.co.uk) and entering the reference number and password from your letter), **or by using the paper copy we have sent you** and returning it to DJS Research in the reply-paid envelope (free of charge).

If there is more than one individual in your household that meets the eligibility criteria, we suggest you ask the person whose birthday it is next to complete the survey (**only one response per household is permitted**).

### Is the survey confidential?

Participation in the survey is **entirely voluntary**. If you choose to complete the survey DJS Research and the CMA will be processing your personal data using the lawful basis of 'public task' (processing necessary for the exercise of a statutory function of the CMA under the Enterprise Act 2002). 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 [www.djsresearch.co.uk/about/terms](http://www.djsresearch.co.uk/about/terms).

It won't be possible for you to be identified in any of the data that DJS Research or the CMA shares with others, nor in any of the survey findings that the CMA makes public. For further information you can view the CMA's privacy notice here: [www.gov.uk/government/organisations/competition-and-markets-authority/about/personal-information-charter](http://www.gov.uk/government/organisations/competition-and-markets-authority/about/personal-information-charter)

### Who can I contact for help?

To find out more about the CMA and the survey being undertaken you can visit: [www.djsresearch.co.uk/cmamobilesurvey](http://www.djsresearch.co.uk/cmamobilesurvey)

For any queries about the survey, or if you wish to opt out from receiving any further contact about the survey please contact DJS Research at: [cmamobilesurvey@djsresearch.com](mailto:cmamobilesurvey@djsresearch.com)

or by calling the survey helpline on 01663 795 685.

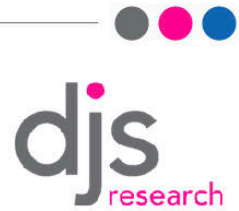
The CMA can be contacted at: [onlinesurveyC@cma.gov.uk](mailto:onlinesurveyC@cma.gov.uk)



## Online questionnaire

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### Questionnaire: CMA Vodafone Three Merger – General Population Survey (GPS)



<b>Client name:</b>	CMA
<b>Project name:</b>	Vodafone Three Merger
<b>Job number:</b>	9745
<b>Methodology:</b>	Push to Web – General Population Survey
<b>Version</b>	7

#### 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





## **Survey of Mobile Phone users**

Thank you for taking the time to fill in this survey, which should only take about 10 minutes. Please complete all questions to the end.

*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 (an electronic voucher redeemable in a range of high street and online stores) as a thank you for your time.*

*Taking part in this survey is entirely voluntary as explained in our covering letter sent to you by post, which also contained other important information that we encourage you to read.*

*As the CMA and DJS Research will be processing your personal data, you have certain rights over that data, including the right to complain. The CMA is the data controller. For more information about your rights, please see the CMA's privacy notice at [www.gov.uk/government/organisations/competition-and-markets-authority/about/personal-information-charter](http://www.gov.uk/government/organisations/competition-and-markets-authority/about/personal-information-charter) and DJS Research's privacy policy at: [www.djsresearch.co.uk/about/terms](http://www.djsresearch.co.uk/about/terms)*

*DJS Research will keep your personal data until the final determination of the CMA's investigation and will then securely delete it.*

## Screening questions

### S01.

#### Base: all respondents

Which age group are you in?

Please select one option only.

**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		
87	Prefer not to say		SCREEN OUT

### S02.

#### Base: all respondents

Do you have a mobile phone for your personal use?

Please select one option only.

**SINGLE RESPONSE**

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

### S03.

#### Base: all respondents

Do you have more than one mobile phone for your personal use?

Please select one option only.

**SINGLE RESPONSE**

Code	Answer list	Scripting notes	Routing
1	Yes		
2	No		

### INFO1

Throughout this survey, if you do have more than one mobile phone for personal use, we would like you to think about the one you use the most.

### S04.

#### Base: all respondents



Thinking about your **personal** mobile phone, do you pay for the ongoing costs of using it yourself?

Please select one option only.

**SINGLE RESPONSE**

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

**S05.**

**Base: all respondents**

Which of the following best describes the mobile phone package that you use?

Please select one option only.

**SINGLE RESPONSE**

Code	Answer list	Scripting notes	Routing
1	Contract (which includes the cost of your handset and for usage/airtime)		S06
2	Split contract (separate contracts for your handset and for your usage/airtime)		S06
3	SIM only contract (you only pay for usage/airtime)		S06
4	Prepay/Pay as you go (PAYG) using top-ups		S07
5	Prepay/Pay as you go (PAYG) bundles (texts, minutes and data allowance lasting 30 days, no contract but rolls-over unless cancelled)		S07
6	Other (please specify)	OPEN	SCREEN OUT
85	Don't know		SCREEN OUT

**S06.**

**Base: where in a contract (S05/1-3)**

If your mobile phone package is part of a monthly contract, are there any other services that you get included in your contract?

Please select all that apply.

**MULTIPLE RESPONSE, ORDERED**

Code	Answer list	Scripting notes	Routing
1	A mobile handset		
2	Landline		
3	Home broadband		
4	Pay TV		
5	Other (Please specify)	OPEN	
85	Don't know	EXCLUSIVE	
87	No - no other services	EXCLUSIVE	

**S07.****Base: all respondents**

Did you choose this mobile phone package yourself?

Please select *one* option only.

**SINGLE RESPONSE**

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

**S08.****Base: all respondents**

Which mobile network provider are you with for your mobile phone?

Please select *one* option only.

**SINGLE RESPONSE, ORDERED**

Code	Answer list	Scripting notes	Routing
1	Asda Mobile		
2	BT Mobile		
3	EE		
4	GiffGaff		
5	iD Mobile		
6	Lebara		
7	Lyca Mobile		
8	O2		
9	Plusnet Mobile		
10	Smarty		
11	Sky Mobile		
12	Talkmobile		
13	TalkTalk		
14	Tesco Mobile		
15	Three (3)		
16	Utility Warehouse		
17	Virgin Mobile		
18	Vodafone		
19	Voxi		
80	Other (Please specify)	OPEN	
85	Don't know		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 and cannot submit the survey to us, so you do not qualify for the £10 GiftPay voucher.

## Purchase

**INFO 2:** For the next few questions, please just answer in relation to the mobile phone you use the most.

### Q01.

**Base: all respondents**

When did you purchase your current mobile phone package from your current provider?

Please select one option only.

**SINGLE RESPONSE, ORDERED**

Code	Answer list	Scripting notes	Routing
1	Within the last 3 months		
2	4-6 months ago		
3	7-12 months ago		
4	1-2 years ago		
5	More than 2 years ago		
85	Don't know		

### Q02.

**Base: all respondents**

And is it your first mobile phone package with your current provider, or have you had one with them before?

Please select one option only.

**SINGLE RESPONSE, ORDERED**

Code	Answer list	Scripting notes	Routing
1	This is my first mobile phone package with my current provider		Q04
2	I had a mobile phone package with my current provider in the past (but not immediately before my current one)		Q04
3	I had a mobile phone package with my current provider immediately before my current package.		Q03
85	Don't know		Q04

### Q03.

**Base: where package immediately before the current one was with the same provider(Q02/3)**

Before you took out your current package, which of the following did you do?

Please select all that apply.

**MULTIPLE RESPONSE, ORDERED**

Code	Answer list	Scripting notes	Routing
------	-------------	-----------------	---------

1	I looked at what else was on offer from <b>my current provider</b>		
2	I looked at what was on offer from <b>other mobile phone network providers</b>		
87	None of the above	EXCLUSIVE	
85	Can't remember	EXCLUSIVE	

**Q04.**

**Base: all respondents**

Thinking about your current mobile phone package, have you ever tried to negotiate a better deal than the one you were first offered?

Please select one option only.

SINGLE RESPONSE, ORDERED

Code	Answer list	Scripting notes	Routing
1	Yes, when I first took out the package		Q05
2	Yes, after I took out the package		Q05
3	No		
85	Don't know		

**Q05.**

**Base: those who tried to negotiate a better deal (Q04/1-2)**

And did you manage to get a better deal than was originally offered by your current provider?

Please select one option only.

SINGLE RESPONSE

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

**Q06.**

**Base: those who managed to negotiate a better deal (Q05/1)**

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)		

7	Other (please specify)	TEXT RESPONSE	
85	Don't know/can't remember	EXCLUSIVE	

**Q07.**

**Base: contract/hybrid users only (S05/1-3 OR 5)**

We are now going to ask you about the cost of your mobile phone package.

Roughly how much do you pay each month for your mobile phone package? If you have said that your current provider provides you with a handset/landline/broadband as well as for the mobile phone service, then please include the cost of the entire package when answering.

Please select one option only.

**SINGLE RESPONSE, ORDERED**

Code	Answer list	Scripting notes	Routing
1	Up to £4.99		
2	£5 to £9.99		
3	£10 to £19.99		
4	£20 to £49.99		
5	£50 to £99.99		
6	£100 to £249.99		
7	£250 or more		
85	Don't know		

**Usage**

**Q08.**

**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.

Please select one option only.

**SINGLE RESPONSE**

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

**Q09.**

**Base: if they own a smartphone (Q08/1)**



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.)

Still thinking about your main mobile phone (the one you use most), which of the following do you ever do when using your provider's network service (i.e. when using your own data and not on a WiFi connection)? *Please select all that apply, but do not include any of these if you ONLY do them when on WiFi.*

**MULTIPLE RESPONSE, ORDERED**

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 for 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/bus fares		
8	Watch 'live video' e.g., live sports events, concerts via TV channels, You Tube, Netflix etc		
9	Play online games where speed is not important (e.g., Chess, Minecraft)		
10	Play online games where speed is important (e.g., Valorant, Call of Duty)		
85	Can't remember		

**Choice factors**

**Q10.**

**Base: all respondents**

Thinking back to when you took out your mobile phone package with your current provider or when you last renewed your mobile phone package with them, which of the following were reasons for choosing your current provider, rather than any other alternative mobile network providers?

*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 the provider		
12	Brand reputation of the provider		
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	

**Q11.**

**Base: all excluding those who don't know (excl. Q011/85)**

And which of these was the single main reason for choosing your current provider?

*Please select one option only.*

SINGLE RESPONSE, KEEP IN SAME ORDER AS Q10, SHOW CODES 1-19 IN ONLINE SURVEY ONLY IF SELECTED AT Q10, HIDE Q AND AUTOCODE IF ONLY ONE REASON (CODES 1-80) SELECTED AT Q10.

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 the provider		
12	Brand reputation of the provider		
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	

## Q12.

### Base: all respondents

Which of the following would be your main consideration if you had to choose a new mobile network provider in the next month?

Please select one option only.

### SINGLE RESPONSE, ORDER AS PER Q10

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 the provider		
12	Brand reputation of the provider		
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		
80	Other (please specify)	TEXT RESPONSE, FIXED	



85	Don't know/not sure	EXCLUSIVE, FIXED	
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**Q13.**

**Base: all respondents**

And if you were having to choose a new mobile network provider in the next month, which of the following actions would you be likely to take before deciding on that provider?

Please select all that apply.

**MULTI RESPONSE, RANDOMISE**

Code	Answer list	Scripting notes	Routing
1	Ask for advice from family, friends and/or acquaintances		
2	Use a comparison website (e.g. Uswitch, Compare the Market).		
3	Look at what is available on different providers' websites.		
4	Discuss offers with different providers' staff (on the phone, online or in a store).		
80	Do something else ( <i>please specify</i> )	TEXT RESPONSE, FIXED	
87	None of the above	EXCLUSIVE, FIXED	
85	Don't know/not sure	EXCLUSIVE, FIXED	

**Q14.**

**Base: all respondents**

When you next make a decision about choosing a mobile network provider, would you be willing to pay more than you do now for a faster network connection?

Please select one option only.

**SINGLE RESPONSE**

Code	Answer list	Scripting notes	Routing
1	Yes, I would be willing to pay more		
2	No, I would not be willing to pay more		
85	Don't know		

**Q15.**

**Base: all respondents**

And would you be willing to pay more for a more reliable network connection?

Please select one option only.

**SINGLE RESPONSE**

Code	Answer list	Scripting notes	Routing
------	-------------	-----------------	---------

1	Yes, I would be willing to pay more		
2	No, I would not be willing to pay more		
85	Don't know		

## Demographics

### D01.

#### Base: all respondents

Please select your gender.

**SINGLE RESPONSE, ORDERED**

Code	Answer list	Scripting notes	Routing
1	Male		
2	Female		
3	Other	TEXT RESPONSE BUT NOT COMPULSORY IF SELECTED	
86	Prefer not to say		

### D05.

#### Base: all respondents

Which of the following best describes the area you live in?

*Please select one option only.*

**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: all respondents**

The quickest way for us to send your voucher is by email. Please enter your name and email address, so that we can send you a £10 GiftPay voucher:

Name: OPEN

Email address: OPEN

Code	Answer list	Scripting notes	Routing
87	I do not have an email address	EXCLUSIVE	

**C02.**

**Base: all respondents who do not have an email address (C01=87)**

If you do not have an email address, then please provide your name and postal address below, so that we can send you a £10 GiftPay voucher via post:

Name: OPEN

Postal address: OPEN

**INFO3**

That is the end of the survey. Thank you very much for your time.

Please allow up to 7-10 working days for us to send you your GiftPay Voucher.

<IF C01=COMPLETED AND 87 NOT SELECTED> If you have not received it after 10 working days, then please check your spam/junk mail.



## Paper postal questionnaire



### Survey of Mobile Phone Users

**Thank you for taking the time to fill in this survey, which should only take about 10 minutes.**

Please complete all questions to the end – only leaving out those that from the instructions are clearly not relevant to you – and then return your completed questionnaire to DJS Research in the reply-paid envelope enclosed by **Wednesday 5th June** (you do not need to attach a stamp).

**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 (an electronic voucher redeemable in a range of high street and online stores) as a thank you for your time.

Taking part in this survey is entirely voluntary as explained in our covering letter, which also contained other important information that we encourage you to read.

As the CMA and DJS Research will be processing your personal data, you have certain rights over that data, including the right to complain. The CMA is the data controller. For more information about your rights, please see the CMA's privacy notice at [www.gov.uk/government/organisations/competition-and-markets-authority/about/personal-information-charter](http://www.gov.uk/government/organisations/competition-and-markets-authority/about/personal-information-charter) and DJS Research's privacy policy at: [www.djsresearch.co.uk/about/terms](http://www.djsresearch.co.uk/about/terms)

DJS Research will keep your personal data until the final determination of the CMA's investigation and will then securely delete it.

#### Q1. What age group are you in?

Please tick one box only.

Under 18 years <input type="checkbox"/> 1	18-24 years <input type="checkbox"/> 2	25 - 34 years <input type="checkbox"/> 3
35- 44 years <input type="checkbox"/> 4	45- 54 years <input type="checkbox"/> 5	55- 64 years <input type="checkbox"/> 6
65- 74 years <input type="checkbox"/> 7	75 years or over <input type="checkbox"/> 8	Prefer not to say <input type="checkbox"/> 9

**If you have ticked either 'Under 18 years' or 'Prefer not say', then unfortunately, you do not qualify for this survey. You do not need to continue, and you do not qualify for the £10 GiftPay voucher. Thank you for your interest in this research.**

#### Q2. Do you have a mobile phone for your personal use?

Please tick one box only.

Yes <input type="checkbox"/> 1	No <input type="checkbox"/> 2
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**If you have ticked 'No', then unfortunately, you do not qualify for this survey. You do not need to continue, and you do not qualify for the £10 GiftPay voucher. Thank you for your interest in this research.**



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**Q3. Do you have more than one mobile phone for your personal use?**

Please tick one box only.

Yes <input type="checkbox"/> 1	No <input type="checkbox"/> 2
--------------------------------	-------------------------------

Throughout this survey, if you do have more than one mobile phone for personal use, we would like you to think about the one you use the most.

---

**Q4. Thinking about your personal mobile phone, do you pay for the ongoing costs of using it yourself?**

Please tick one box only.

Yes <input type="checkbox"/> 1	No <input type="checkbox"/> 2
--------------------------------	-------------------------------

*If you have ticked 'No', then unfortunately, you do not qualify for this survey. You do not need to continue, and you do not qualify for the £10 GiftPay voucher. Thank you for your interest in this research.*

---

**Q5. Which of the following best describes the mobile phone package that you use?**

Please tick one box only.

1. Contract (which includes the cost of your handset and for usage/airtime)	<input type="checkbox"/> GO TO Q6
2. Split contract (separate contracts for your handset and for your usage/airtime)	<input type="checkbox"/> GO TO Q6
3. SIM only contract (you only pay for usage/airtime)	<input type="checkbox"/> GO TO Q6
4. Prepay/Pay as you go (PAYG) using top-ups	<input type="checkbox"/> GO TO Q7
5. Prepay/Pay as you go (PAYG) bundles (texts, minutes and data allowance lasting 30 days, no contract but rolls-over unless cancelled)	<input type="checkbox"/> GO TO Q7
6. Other (please specify) _____	<input type="checkbox"/>
7. Don't know	<input type="checkbox"/>

*If you have ticked option 1, 2 or 3 at Q5, please continue to Q6.*

*If you have ticked option 4 or 5 at Q5, please go to Q7.*

*If you have ticked either 'Other' or 'Don't know', then unfortunately, you do not qualify for this survey. You do not need to continue, and you do not qualify for the £10 GiftPay voucher. Thank you for your interest in this research.*

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**Q6. If your mobile phone package is part of a monthly contract, are there any other services that you get included in your contract?**

Please tick all that apply.

A mobile handset <input type="checkbox"/> 1	Landline <input type="checkbox"/> 2	Home broadband <input type="checkbox"/> 3
Pay TV <input type="checkbox"/> 4	Other (Please specify) <input type="checkbox"/> 5 _____	Don't know <input type="checkbox"/> 6
No other services included <input type="checkbox"/> 7		

**Q7. Did you choose this mobile phone package yourself?**

Please tick one box only.

Yes <input type="checkbox"/> 1	No <input type="checkbox"/> 2
--------------------------------	-------------------------------

*If you have ticked 'No', then unfortunately, you do not qualify for this survey. You do not need to continue, and you do not qualify for the £10 GiftPay voucher. Thank you for your interest in this research.*

**Q8. Which mobile network provider are you with for your mobile phone?**

Please tick one box only.

Asda Mobile <input type="checkbox"/> 1	BT Mobile <input type="checkbox"/> 2	EE <input type="checkbox"/> 3
GiffGaff <input type="checkbox"/> 4	iD Mobile <input type="checkbox"/> 5	Lebara <input type="checkbox"/> 6
Lyca Mobile <input type="checkbox"/> 7	O2 <input type="checkbox"/> 8	Plusnet Mobile <input type="checkbox"/> 9
Smarty <input type="checkbox"/> 10	Sky Mobile <input type="checkbox"/> 11	Talkmobile <input type="checkbox"/> 12
TalkTalk <input type="checkbox"/> 13	Tesco Mobile <input type="checkbox"/> 14	Three (3) <input type="checkbox"/> 15
Utility Warehouse <input type="checkbox"/> 16	Virgin Mobile <input type="checkbox"/> 17	Vodafone <input type="checkbox"/> 18
Voxi <input type="checkbox"/> 19	Other (Please specify) <input type="checkbox"/> 20 _____	
Don't know <input type="checkbox"/> 21		

*If you have ticked 'Don't know', then unfortunately, you do not qualify for this survey. You do not need to continue, and you do not qualify for the £10 GiftPay voucher. Thank you for your interest in this research.*

*If you have completed the qualifying questions and you do qualify for the survey, then please proceed to Q9. You will receive a £10 GiftPay voucher if you successfully complete the remaining questions in the survey and return it to DJS Research by Wednesday 5th June 2024.*



## Purchase

For the next few questions, please just answer in relation to the mobile phone you use the most.

### Q9. When did you purchase your current mobile phone package from your current provider?

Please tick one box only.

Within the last 3 months <input type="checkbox"/> 1	4-6 months ago <input type="checkbox"/> 2	7-12 months ago <input type="checkbox"/> 3
1-2 years ago <input type="checkbox"/> 4	More than 2 years ago <input type="checkbox"/> 5	Don't know <input type="checkbox"/> 6

### Q10. And is it your first mobile phone package with your current provider, or have you had one with them before?

Please tick one box only.

1. This is my first mobile phone package with my current provider	<input type="checkbox"/> GO TO Q12
2. I had a mobile phone package with my current provider in the past (but not immediately before my current one)	<input type="checkbox"/> GO TO Q12
3. I had a mobile phone package with my current provider immediately before my current package	<input type="checkbox"/> GO TO Q11
4. Don't know	<input type="checkbox"/> GO TO Q12

*If you have ticked option 1, 2 or 4 at Q10, please go to Q12.*

*If you have ticked option 3 at Q10, please continue to Q11.*

### Q11. Before you took out your current package, which of the following did you do?

Please tick all that apply.

I looked at what else was on offer from <b>my current provider</b>	<input type="checkbox"/> 1
I looked at what was on offer from <b>other mobile phone network providers</b>	<input type="checkbox"/> 2
None of the above	<input type="checkbox"/> 3
Can't remember	<input type="checkbox"/> 4



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**Q12. Thinking about your current mobile phone package, have you ever tried to negotiate a better deal than the one you were first offered?**

Please tick one box only.

1. Yes, when I first took out the package	<input type="checkbox"/> GO TO Q13
2. Yes, after I took out the package	<input type="checkbox"/> GO TO Q13
3. No	<input type="checkbox"/> GO TO Q15
4. Don't know	<input type="checkbox"/> GO TO Q15

*If you have ticked option 3 or 4 at Q12, please go to Q15.*

*If you have ticked option 1 or 2 at Q12, please continue to Q13.*

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**Q13. And did you manage to get a better deal than was originally offered by your current provider?**

Please tick one box only.

1. Yes <input type="checkbox"/> GO TO Q14	2. No <input type="checkbox"/> GO TO Q15
3. Don't know <input type="checkbox"/> GO TO Q15	

*If you have ticked option 2 or 3 at Q13, please go to Q15.*

*If you have ticked option 1 at Q13, please continue to Q14.*

---

**Q14. And what was better about the new deal?**

Please tick all that apply.

Decreasing the cost of my package <input type="checkbox"/> 1	Increasing my free texts and/or minutes <input type="checkbox"/> 2
Adding an entertainment package <input type="checkbox"/> 3	Increasing my data allowance <input type="checkbox"/> 4
Upgrading my handset <input type="checkbox"/> 5	Changing the contract length (where applicable) <input type="checkbox"/> 6
Other (please specify) <input type="checkbox"/> 7 _____	Don't know/ can't remember <input type="checkbox"/> 8





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**Q15. Introduction (please read to see if you need to complete Q15)**

**If you do not have a mobile phone package that is a contract or a prepay/Pay as you go (PAYG) bundle (texts, minutes and data allowance lasting 30 days, no contract but rolls-over unless cancelled), please go to Q16.**

**If you do have a mobile phone package that is a contract or a prepay/Pay as you go (PAYG) bundle (i.e. you ticked option 1, 2, 3 or 5 at Q5) please continue to complete Q15.**

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**Q15. Roughly how much do you pay each month for your mobile phone package?**

Please tick one box only.

If you have said that your current provider provides you with a handset/landline/broadband as well as for the mobile phone service, then please include the cost of the entire package when answering.

Up to £4.99 <input type="checkbox"/> 1	£5 to £9.99 <input type="checkbox"/> 2	£10 to £19.99 <input type="checkbox"/> 3
£20 to £49.99 <input type="checkbox"/> 4	£50 to £99.99 <input type="checkbox"/> 5	£100 to £249.99 <input type="checkbox"/> 6
£250 or more <input type="checkbox"/> 7	Don't know <input type="checkbox"/> 8	

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## Usage

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**Q16. Is your mobile phone a smartphone?**

Please tick one box only.

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.

1. Yes <input type="checkbox"/> GO TO Q17	2. No <input type="checkbox"/> GO TO Q18
3. Don't know <input type="checkbox"/> GO TO Q18	

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**If you ticked option 2 or 3 at Q16, please go to Q18.**

**If you ticked option 1 at Q16, please continue to Q17.**

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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).

**Q17. Still thinking about your main mobile phone (the one you use most, if you use more than one), which of the following do you ever do when using your provider's network service (i.e. when using your own data and not on a WiFi connection)?**

Please tick all that apply, but do not include any of these if you ONLY do them when on WiFi.

Make and/or receive voice calls	<input type="checkbox"/>	1
Send, receive or read email messages	<input type="checkbox"/>	2
Browse the internet (e.g. read content, search for something, look at pictures)	<input type="checkbox"/>	3
Use instant messaging services (e.g. WhatsApp, Facebook Messenger, Snapchat, iMessage)	<input type="checkbox"/>	4
Make or receive video calls (e.g. Teams, Zoom, Google meet, WhatsApp, Facetime etc.)	<input type="checkbox"/>	5
Listen to music, radio, e-books, podcasts	<input type="checkbox"/>	6
Make contactless payments at point of sale/checkouts/rail/bus fares	<input type="checkbox"/>	7
Watch 'live video' e.g. live sports events, concerts via TV channels, You Tube, Netflix etc.	<input type="checkbox"/>	8
Play online games where speed is not important (e.g. Chess, Minecraft)	<input type="checkbox"/>	9
Play online games where speed is important (e.g. Valorant, Call of Duty)	<input type="checkbox"/>	10
Can't remember	<input type="checkbox"/>	11



## Choice factors

**Q18. Thinking back to when you took out your mobile phone package with your current provider or when you last renewed your mobile phone package with them, which of the following were reasons for choosing your current provider, rather than any other providers?**

Please tick all that apply.

Contract length <input type="checkbox"/> 1	Brand reputation of current provider <input type="checkbox"/> 2
Handset make/type/version <input type="checkbox"/> 3	Handset upgrade or availability <input type="checkbox"/> 4
Other services that formed part of the bundle <input type="checkbox"/> 5	Network speed <input type="checkbox"/> 6
Network reliability for voice calls <input type="checkbox"/> 7	Network reliability for uploading & downloading data <input type="checkbox"/> 8
Network coverage <input type="checkbox"/> 9	Network response speed for gaming <input type="checkbox"/> 10
Customer service of current provider <input type="checkbox"/> 11	Price <input type="checkbox"/> 12
Generous data allowance <input type="checkbox"/> 13	Having unlimited data <input type="checkbox"/> 14
Unlimited or high volume of texts <input type="checkbox"/> 15	Roaming costs <input type="checkbox"/> 16
Having free roaming in the EU (and possibly elsewhere) <input type="checkbox"/> 17	Perks/rewards/discounts/offers <input type="checkbox"/> 18
Good previous experience with this provider <input type="checkbox"/> 19	Other (please specify) <input type="checkbox"/> 20  _____
Don't know/can't remember <input type="checkbox"/> 21 GO TO Q20	

***If you ticked option 21 at Q18, please go to Q20.***



**Q19. And which of these was the single main reason for choosing your current provider?**

Please tick one box only.

Contract length <input type="checkbox"/> 1	Brand reputation of current provider <input type="checkbox"/> 2
Handset make/type/version <input type="checkbox"/> 3	Handset upgrade or availability <input type="checkbox"/> 4
Other services that formed part of the bundle <input type="checkbox"/> 5	Network speed <input type="checkbox"/> 6
Network reliability for voice calls <input type="checkbox"/> 7	Network reliability for uploading & downloading data <input type="checkbox"/> 8
Network coverage <input type="checkbox"/> 9	Network response speed for gaming <input type="checkbox"/> 10
Customer service of current provider <input type="checkbox"/> 11	Price <input type="checkbox"/> 12
Generous data allowance <input type="checkbox"/> 13	Having unlimited data <input type="checkbox"/> 14
Unlimited or high volume of texts <input type="checkbox"/> 15	Roaming costs <input type="checkbox"/> 16
Having free roaming in the EU (and possibly elsewhere) <input type="checkbox"/> 17	Perks/rewards/ discounts/offers <input type="checkbox"/> 18
Good previous experience with this provider <input type="checkbox"/> 19	Other (please specify) <input type="checkbox"/> 20
Don't know/can't remember <input type="checkbox"/> 21	



**Q20. Which of the following would your main consideration be if you had to choose a new mobile network provider in the next month?**

Please tick one box only.

Contract length <input type="checkbox"/> 1	Brand reputation of the provider <input type="checkbox"/> 2
Handset make/type/version <input type="checkbox"/> 3	Handset upgrade or availability <input type="checkbox"/> 4
Other services that formed part of the bundle <input type="checkbox"/> 5	Network speed <input type="checkbox"/> 6
Network reliability for voice calls <input type="checkbox"/> 7	Network reliability for uploading & downloading data <input type="checkbox"/> 8
Network coverage <input type="checkbox"/> 9	Network response speed for gaming <input type="checkbox"/> 10
Customer service of the provider <input type="checkbox"/> 11	Price <input type="checkbox"/> 12
Generous data allowance <input type="checkbox"/> 13	Having unlimited data <input type="checkbox"/> 14
Unlimited or high volume of texts <input type="checkbox"/> 15	Roaming costs <input type="checkbox"/> 16
Having free roaming in the EU (and possibly elsewhere) <input type="checkbox"/> 17	Perks/rewards/ discounts/offers <input type="checkbox"/> 18
Other (please specify) <input type="checkbox"/> 19	
<hr/>	
Don't know/Not sure <input type="checkbox"/> 20	



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**Q21. And if you were having to choose a new mobile network provider in the next month, which of the following actions would you be likely to take before deciding on that provider?**

Please tick all that apply.

Ask for advice from family, friends and/or acquaintances	<input type="checkbox"/>	1
Use a comparison website (e.g. Uswitch, Compare the Market)	<input type="checkbox"/>	2
Look at what is available on different providers' websites	<input type="checkbox"/>	3
Discuss offers with different providers' staff (on the phone, online or in a store)	<input type="checkbox"/>	4
Do something else (please specify) _____	<input type="checkbox"/>	5
None of the above	<input type="checkbox"/>	6
Don't know/not sure	<input type="checkbox"/>	7

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**Q22. When you next make a decision about choosing a mobile network provider, would you be willing to pay more than you do now for a faster network connection?**

Please tick one box only.

Yes, I would be willing to pay more	<input type="checkbox"/>	1	No, I would not be willing to pay more	<input type="checkbox"/>	2
Don't know	<input type="checkbox"/>	3			

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**Q23. And would you be willing to pay more for a more reliable network connection?**

Please tick one box only.

Yes, I would be willing to pay more	<input type="checkbox"/>	1	No, I would not be willing to pay more	<input type="checkbox"/>	2
Don't know	<input type="checkbox"/>	3			







## Language sheet (further information)

### Further Information

The survey we have sent you is on behalf of the Competitions and Markets Authority (CMA), a government body.

The CMA has asked DJS Research to carry out a survey of mobile phone users. The **survey is voluntary** and can be done online (using the details on the letter) or you can fill it out using the paper copy we have sent you.

To qualify for the survey you must be aged 18+ and meet certain eligibility criteria, including that you must have a mobile phone that is for personal use which you pay for using yourself. Eligible participants who go on to complete the survey will receive a **£10 GiftPay voucher** (an electronic voucher redeemable in a range of high street and online stores) as a thank you for your time.

For further information visit:  
[www.djsresearch.co.uk/cmamobilesurvey](http://www.djsresearch.co.uk/cmamobilesurvey).

If you would like to do the survey but cannot complete it in English, either online or using the paper copy, you can request for the survey to be done over the telephone by calling the survey helpline on 01663 795 685. **The survey closing date is 2nd June 2024.**

#### Welsh

Rydym wedi anfon yr arolwg hwn atoch ar ran yr Awdurdod Cystadleuaeth a Marchnadoedd (CMA), sy'n gorff llywodraethol.

Mae'r CMA wedi gofyn i DJS Research gynnal arolwg o ddefnyddwyr ffonau symudol. **Arolwg gwirfoddol yw hwn** a gellir ei wneud ar-lein (gan ddefnyddio'r manylion ar y llythyr) neu gallwch ei lenwi gan ddefnyddio'r copi papur rydym wedi'i anfon atoch.

I fod yn gymwys ar gyfer yr arolwg rhaid i chi fod yn 18+ oed a bodloni meini prawf cymhwysedd penodol, gan gynnwys bod rhaid bod gennych ffôn symudol sydd at ddefnydd personol yr ydych yn talu am ei ddefnyddio eich hun. Bydd cyfranogwyr cymwys sy'n mynd ymlaen i lenwi'r arolwg yn derbyn taleb GiftPay gwerth £10 (tocyn electronig y gellir ei ddefnyddio mewn amrywiaeth o siopau stryd fawr ac ar-lein) i ddiolch i chi am eich amser.

Am ragor o wybodaeth ewch i:  
[www.djsresearch.co.uk/cmamobilesurvey](http://www.djsresearch.co.uk/cmamobilesurvey).

Os hoffech wneud yr arolwg ond na allwch ei gwblhau yn Saesneg, naill ai ar-lein neu drwy ddefnyddio'r copi papur, gallwch wneud cais i'r arolwg gael ei wneud dros y ffôn drwy ffonio llinell gymorth yr arolwg ar 01663 795685. Dyddiad cau'r arolwg yw 2 Mehefin 2024.

#### Polish

Przesyłamy Państwu ankietę w imieniu Urzędu ds. Konkurencji i Rynków (CMA) – organu rządowego.

Organ ten zwrócił się do DJS Research z prośbą o przeprowadzenie ankiety wśród użytkowników telefonów komórkowych. **Wypełnienie tego dokumentu jest dobrowolne** i można to zrobić on-line (wykorzystując dane podane na przesłanym przez nas piśmie) lub udzielić odpowiedzi na pytania zawarte w przesłanej przez nas ankiecie papierowej.

Aby zakwalifikować się do udziału w tym badaniu, należy mieć ukończone 18 lat i spełniać określone kryteria, w tym posiadać telefon komórkowy przeznaczony do użytku osobistego, opłacany ze środków własnych uczestnika badania. Uprawieni uczestnicy po wypełnieniu ankiety otrzymają voucher GiftPay o wartości 10 GBP (voucher elektroniczny do wykorzystania na poczet opłacenia kosztów zakupów w wielu sklepach stacjonarnych i internetowych), w ramach podziękowania za poświęcony czas.

Więcej informacji dostępnych jest na stronie:  
[www.djsresearch.co.uk/cmamobilesurvey](http://www.djsresearch.co.uk/cmamobilesurvey).

Jeśli chcieliby Państwo wypełnić ankietę, jednak nie możecie tego uczynić w języku angielskim (czy to online czy w wersji papierowej), możecie to uczynić telefonicznie dzwoniąc pod numer infolinii ds. opinii ankietowych 01663 795685. Termin zakończenia badania to 2 czerwca 2024 r.

#### Romanian

Sondajul pe care vi l-am trimis este în numele Autorității pentru Concurență și Piețe (CMA), un organism guvernamental.

CMA a solicitat companiei DJS Research să efectueze un sondaj cu privire la utilizatorii de telefoane mobile. **Sondajul este voluntar** și se poate efectua online (folosind detaliile din scrisoare) sau îl puteți completa folosind exemplarul tipărit pe care vi l-am trimis.

Pentru a vă califica pentru sondaj, trebuie să aveți vârsta peste 18 ani și să îndepliniți anumite criterii de eligibilitate, inclusiv faptul că trebuie să aveți un telefon mobil de uz personal a cărui factură o achitați dvs. Participanții eligibili care vor completa sondajul vor primi un voucher GiftPay de 10 GBP (un voucher electronic care poate fi revendicat într-o gamă largă de magazine și online) în semn de mulțumire pentru timpul acordat.

Pentru mai multe informații, vizitați:  
[www.djsresearch.co.uk/cmamobilesurvey](http://www.djsresearch.co.uk/cmamobilesurvey).

Dacă doriți să efectuați sondajul, dar nu-l puteți completa în limba engleză, fie online, fie folosind exemplarul tipărit, puteți solicita ca sondajul să fie realizat prin telefon, apelând linia de asistență pentru sondaj la 01663 795685. Data de închidere a sondajului este 2 iunie 2024.





## Urdu

ہم مراد ایراکرس کی وجہ سے بنیاد کی (CMA) میٹراہتا سٹی کی مراد زنیٹ میٹریٹیک مو ہے۔ اچھی ہب وک پہاے ورس وچ سے ن ہہ نئیال نا روا ہے مناراکاضر ورس۔ عرس ورس اک وولواو سے نرک لامعتسا نونف لیبوم مو۔ مک ہے امک سے چرسیر سی جی یڈ سے عا میا سی وچ سے نکتس رک رپ کے رک لامعتسا وک میپاک یڈغاک سا پہاے ای (ہے) سے نرک لامعتسا اک نالی صنت میٹیک دی رپ طخ) ہے اتکس اج ایک ہے جی ہب وک پہاے ن ہہ

مک ہی ویش ب ہے میچاچ انریٹا اروپ رپ تارای عم چچ کے کے تیلیٹا روا ہے میچاچ میچاچ 18+ رمع کی پہاے کے کے ونوہ لہا اک سے نلی صحت می ورس نہی سے نرک کی میٹاڈا ہے کے کے نرک لامعتسا نوخ پہاے سے ج وہ ہے کے کے لامعتسا یٹاڈا وچ ہے میچاچ انوہ نونف لیبوم سی کی سا پہاے کے پہاے نئیال نا روا ٹیٹسٹا میٹاڈا وچ رچواو کناریٹکیڈا کی) رچواو GiftPay اک £10 رپ روط کے می رکش آاکرش لہا سے او سے نرک لامعتسا وک ورس سے کے کے لہا صحت (ہے) اتکس اج ایک میٹیکر سی جی کی کی زروٹسا

www.djsresearch.co.uk/cmamobilesurvey . میٹراہتا سے کے کے تامل ہے کے کے تامل عم دیڈم

پہاے کے رک لامعتسا میپاک یڈغاک ای نئیال نا وٹ ای، سے نکتس رک سی من لکم سی می یڈیرگنا سے نکتس سی سے تامل انرک لامعتسا ورس پہاے رگا ایک سے نرک لامعتسا ورس سے نکتس رک سے اوخر دی سے نرک سے ورس رپ ونیٹ سے کے کے رک اک رپ نئیال پہاے ہے ورس رپ 01663 795685 ہے 2024 وچ 2 خیرات یرخ

## Punjabi

ਅਸੀਂ ਤੁਹਾਨੂੰ ਸਰਵੇਖਣ ਭੇਜਿਆ ਹੈ، ਉਹ ਪ੍ਰਤੀਯੋਗਤਾ ਅਤੇ ਮਾਰਕੀਟ ਅਥਾਰਟੀ (CMA) ਦੀ ਤਰਫ਼ ਹੈ، ਜੋ ਇੱਕ ਸਰਕਾਰੀ ਸੰਸਥਾ ਹੈ।

ਸੀਐਮਏ (CMA) ਨੇ ਡੀਜ਼ੀ ਐਸ ਰਿਸਰਚ (DJS Research) ਨੂੰ ਬਾਈਲ ਫੋਨ ਉਪਭੋਗਤਾਵਾਂ ਦਾ ਸਰਵੇਖਣ ਕਰਨ ਲਈ ਕਿਹਾ ਹੈ। **ਸਰਵੇਖਣ ਸਵੈ-ਇੱਛਤ** ਹੈ ਅਤੇ ਐਨਲਾਈਨ ਕੀਤਾ ਜਾ ਸਕਦਾ ਹੈ (ਪੱਤਰ 'ਤੇ ਦਿੱਤੇ ਵਰਣਿਆਂ ਦੀ ਵਰਤੋਂ ਕਰਕੇ) ਜਾਂ ਤੁਸੀਂ ਸਾਡੇ ਦੁਆਰਾ ਤੁਹਾਨੂੰ ਜੀ ਗਈ ਕਾਗਜ਼ੀ ਕਾਪੀ ਨੂੰ ਸਕਦੇ ਹੋ।

ਸਰਵੇਖਣ ਵਿੱਚ ਹਿੱਸਾ ਲੈਣ ਲਈ ਤੁਹਾਡੀ ਉਮਰ 18 ਸਾਲ ਤੋਂ ਵੱਧ ਹੋਣੀ ਚਾਹੀਦੀ ਹੈ ਅਤੇ ਕੁਝ ਲੋੜਾਂ ਪੂਰੀਆਂ ਕਰਨੀਆਂ ਚਾਹੀਦੀਆਂ ਹਨ, ਜਿਸ ਵਿੱਚ ਨਿੱਜੀ ਵਰਤੋਂ ਲਈ ਮੌਜੂਦਾ ਫੋਨ ਹੋਣਾ ਵੀ ਸ਼ਾਮਲ ਹੈ ਜਿਸਦਾ ਤੁਸੀਂ ਆਪਣੇ ਲਈ ਭੁਗਤਾਨ ਕਰਦੇ ਹੋ। ਸਰਵੇਖਣ ਨੂੰ ਕਰਨ ਵਾਲੇ ਭਾਗੀਦਾਰਾਂ ਨੂੰ ਦਿੱਤਾ ਜਾਵੇਗਾ ਜਿਸ ਵਿੱਚ £10 ਦਾ GiftPay ਵਾਧੂ (ਜਿਸ ਵਿੱਚ ਫੋਨ ਅਤੇ ਐਨਲਾਈਨ ਸਟੋਰਾਂ ਦੀ ਇੱਕ ਰੱਜ 'ਤੇ ਰੀਡੀਮ ਕਰਨ ਯੋਗ ਈ-ਵਾਊਚਰ) ਪ੍ਰਾਪਤ ਹੋਵੇਗਾ।

ਹੋਰ ਜਾਣਕਾਰੀ ਲਈ ਵੇਖੋ:  
[www.djsresearch.co.uk/cmamobilesurvey](http://www.djsresearch.co.uk/cmamobilesurvey).

ਜੇਕਰ ਤੁਸੀਂ ਸਰਵੇਖਣ ਕਰਨਾ ਚਾਹੁੰਦੇ ਹੋ ਪਰ ਇਸ ਨੂੰ ਗਰਹੀ ਵਿੱਚ ਪੂਰਾ ਕਰਨ ਵਿੱਚ ਅਸਮਰੱਥ ਹੋ, ਜਾਂ ਤਾਂ ਐਨਲਾਈਨ ਜਾਂ ਕਾਗਜ਼ੀ ਕਾਪੀ ਦੀ ਵਰਤੋਂ ਕਰਕੇ, ਤੁਸੀਂ 01663 795685 'ਤੇ ਸਰਵੇਖਣ ਹੈਲਪਲਾਈਨ 'ਤੇ ਕਾਲ ਕਰਕੇ ਇਸ ਨੂੰ ਖੁੱਲ੍ਹਣ ਉੱਤੇ ਕਰਨ ਲਈ ਬੇਨਤੀ ਕਰ ਸਕਦੇ ਹੋ। ਸਰਵੇਖਣ ਦੀ ਸਮਾਪਤੀ ਮਿਤੀ 2 ਜੂਨ 2024 ਹੈ।

## Portuguese

O inquérito que lhe enviamos é em nome da Autoridade da Concorrência e Mercados (CMA), um órgão governamental.

A CMA solicitou à DJS Research que realizasse um inquérito aos utilizadores de telemóveis. O **inquérito é voluntário** e pode ser realizado online (através dos dados da declaração) ou pode preencher-lo utilizando a cópia impressa que lhe enviamos.

Para se qualificar para o inquérito, deve ter mais de 18 anos e reunir determinados critérios de elegibilidade, incluindo a necessidade de ter um telemóvel para utilização pessoal, cuja utilização seja paga por si. Os participantes elegíveis que concluírem o inquérito receberão um voucher GiftPay de £10 (um voucher eletrónico resgatável em diversas lojas online e físicas) como agradecimento pelo seu tempo.

Para mais informações visite:  
[www.djsresearch.co.uk/cmamobilesurvey](http://www.djsresearch.co.uk/cmamobilesurvey).

Se desejar realizar o inquérito, mas não consegue preenchê-lo em inglês, seja online ou utilizando a cópia impressa, pode solicitar que o inquérito seja realizado por telefone, ligando para a linha de apoio ao inquérito através do número 01663 795685. A data limite do inquérito é 2 de junho de 2024.

## Spanish

La encuesta que le hemos enviado se realiza en nombre de la Autoridad de Mercados y Competencias (CMA), un organismo gubernamental.

La CMA ha pedido a DJS Research que realice una encuesta entre los usuarios de teléfonos móviles. La **encuesta es voluntaria** y se puede realizar en línea (usando los datos que figuran en la carta) o la puede rellenar utilizando la copia impresa que le hemos enviado.

Para poder participar en la encuesta, debe tener más de 18 años y cumplir determinados requisitos, entre ellos tener un teléfono móvil de uso personal y de pago. Los participantes que reúnan los requisitos y que completen la encuesta recibirán un vale GiftPay de 10 £ (un vale electrónico canjeable en una serie de tiendas físicas y en línea) como agradecimiento por su tiempo.

Para más información visite:  
[www.djsresearch.co.uk/cmamobilesurvey](http://www.djsresearch.co.uk/cmamobilesurvey).

Si desea realizar la encuesta, pero no puede ni en línea ni utilizando la copia impresa porque está en inglés, puede solicitar realizarla por teléfono llamando a la línea de asistencia al 01663 795685. La encuesta finaliza el 2 de junio de 2024.

## Bengali

আমরা আপনাকে যা সমীক্ষাটি পাঠিয়েছি তা কম্পিটিভিস অ্যান্ড মার্কেটিং অথরিটি (CMA), একটি সরকারি সংস্থার তরফে।

সিএমএ (CMA) ডিজিএস রিসার্চ (DJS Research)-কে মে বাইল ফোনে ব্যবহারকারীদের উপর একটি সমীক্ষা চালাতে বলেছে। **সমীক্ষাটি স্বৈচ্ছিক** এবং অনলাইনে সম্পূর্ণ করা যাবে পারে (চিঠিতে বর্ণিত ব্যবহার করে) অথবা আমরা আপনাকে যা কাগজের কপি পাঠিয়েছি তা ব্যবহার করে আপনি এটি সম্পূর্ণ করতে পারেন।

সমীক্ষায় অংশগ্রহণ করার জন্য আপনার বয়স অবশ্যই 18+ হতে হবে এবং কিছু প্রযোজ্যতা পূরণ করতে হবে, যার অন্তর্গত আপনার ব্যক্তিগত ব্যবহারের জন্য একটি মে বাইল ফোনে অবশ্যই থাকতে হবে যা নিজের ব্যবহারের জন্য আপনি নিজের অর্থ প্রদান করবেন। যা যা গ্যাজেট অংশগ্রহণকারীদের সমীক্ষাটি সম্পূর্ণ করার সময় দেওয়ার জন্য ধন্যবাদ হিসাবে একটি £10 Gift-Pay ভাউচার (যা স্টোরে এবং অনলাইন স্টোরে একটি পরিসরে রিডিমযোগ্য গ্যাজেট ই-ভাউচার) পাবেন।

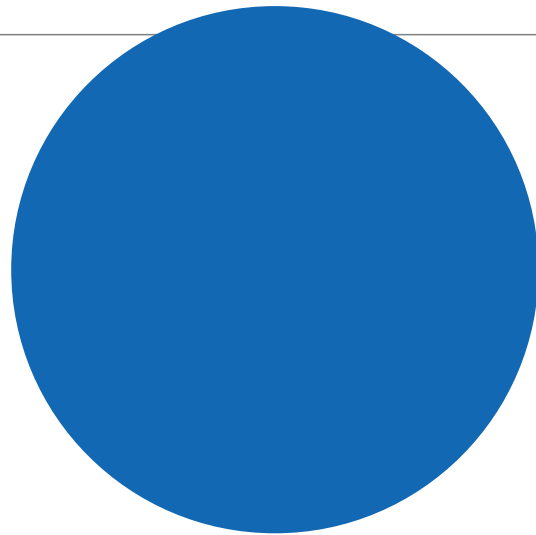
আরও তথ্যের জন্য দেখুন: [www.djsresearch.co.uk/cmamobilesurvey](http://www.djsresearch.co.uk/cmamobilesurvey).

আপনি যদি সমীক্ষাটি নতুন চান কিন্তু অনলাইনে অথবা কাগজের অনুলিপি ব্যবহার করা ইংরেজিতে এটি সম্পূর্ণ করতে অক্ষম হন, তাহলে আপনি 01663 795685 নম্বরে সমীক্ষা হেল্পলাইনে কল করে মে বাইল দেওয়ার জন্য অনুরোধ করতে পারেন। সমীক্ষার শেষ তারিখ 2রা জুন 2024।



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# For more information



**James Hinde, Research Director**

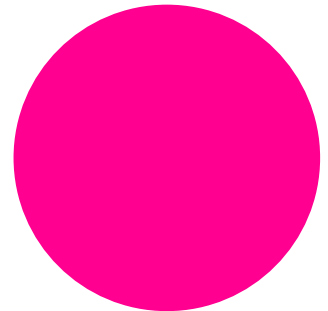
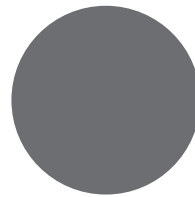
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