

## Resilience Market Research – Final Questionnaire

This survey is being conducted on behalf of Ofcom, the UK regulator for providers of mobile phone, broadband and landline services. Ofcom has a duty to ensure that customers of these service providers are treated fairly and are protected from harm. We would like to understand more about people's usage of communication services.

### IF SCREENED OUT SHOW SCREEN:

**Thank you for participation. Based on your answers you are not eligible to take this survey**

### GRID

#### Multiple choice

Q1. Which of the following communications services do you or your household have? And which do you use personally?

#### COLUMN

1. Have in household
2. Use personally

#### ROWS

- 1\_1 Landline phone that can be used for making and receiving calls
- 1\_2 Mobile phone
- 1\_3 Fixed broadband internet access (through a phone line or cable service, perhaps using a wi-fi router)
- 1\_4 None of these (exclusive)

### Single choice GRID

Q2. How often, if at all, do you use the following services?

#### COLUMN

1. Every day
2. At least once a week
3. About once every two weeks
4. About once a month
5. I have access to this but do not use it
6. I do not have access to this service

#### ROWS randomise

Q2\_1. SMS text messages on a mobile

Q2\_2. Voice calls on a mobile

Q2\_3. Voice calls on a landline

- Q2\_4. BBC iPlayer
- Q2\_5. BBC News online
- Q2\_6. Discord
- Q2\_7. Facebook (in App or browser)
- Q2\_8. Facebook Messenger
- Q2\_9. FaceTime
- Q2\_10. Google Chrome
- Q2\_11. Google Meets
- Q2\_12. Google Search
- Q2\_13. iMessage (online messages, not SMS)
- Q2\_14. Microsoft Outlook
- Q2\_15. Skype
- Q2\_16. Snapchat
- Q2\_17. Microsoft Teams
- Q2\_18. Telegram
- Q2\_19. Viber
- Q2\_20. WhatsApp
- Q2\_21. YouTube
- Q2\_22. Zoom

**ASK ALL WHO USE [MOBILE VOICE CALLS, AND/OR MOBILE TEXT] AND MESSAGING APPS AT LEAST ABOUT ONCE A MONTH 1-4 AT Q2**

**(Q2\_1 or Q2\_2 in [1,2,3,4]) AND ([1,2,3,4] selected in at least one row in Q2\_6 to Q2\_9, Q2\_11, Q2\_13 to Q2\_22**

Q3. What type of communication method do you prefer to use to contact other people on your mobile?

**SINGLE CODE**

1. SMS texts
2. Voice calls
3. Messaging apps such as WhatsApp, Snapchat etc.

**ASK IF 3 IS SELECTED AT Q3 (ask all who prefer use messaging apps at Q3)**

**MULTICODE randomise**

Q4. Why do you prefer to use messaging apps rather than texts or voice calls on your mobile?

1. It's less intrusive for the person receiving the message
2. I can see on the app that the person I've sent the message to has received it /seen it
3. It doesn't use up my voice or text allowances
4. I have unlimited data
5. I can use them over Wi-Fi and avoid using my data allowance
6. I can send pictures/videos/audio messages without being charged extra
7. Messaging apps are easier to use than texting
8. Messaging apps are easier to use than calling someone
9. No-one I communicate with uses texts
10. No-one I communicate with uses voice calls
11. Other (PLEASE WRITE IN)

**ASK ALL WHO USE MORE THAN ONE MESSAGING SERVICE AT Q2 (APPS USED AT Q2 TO BE SPECIFIED) AT LEAST ABOUT ONCE A MONTH 1-4 AT Q2**

**AND (ASK ALL-[1,2,3,4] selected in at least one row in Q2\_6 to Q2\_9, Q2\_11, Q2\_13 to Q2\_22)**

**MULTICODE randomise**

Q5. Why do you use more than one messaging service? Please select all that apply

1. I choose to use different messaging apps to communicate with different people/groups of people
2. I use different services for different purposes (e.g. posting pictures, sending personal messages)
3. I sometimes use other services when the one I would prefer to use isn't working
4. I use different services depending on whether I'm connected to Wi-Fi or using my network connection/data allowance
5. One (or more) of the apps I use is more private/secure than the other(s)
6. One (or more) of the apps I use is more reliable than the other(s)
7. Some people I communicate with use different messaging apps, so I have to use what they use.
8. Other [WRITE IN]

**ASK [1,2,3,4] selected in at least one row in Q2\_6 to Q2\_9, Q2\_11, Q2\_13 to Q2\_22**

Q6. Do you have any concerns about any of the messaging services you use?

Please select all that apply

**MULTICODE randomise 1-7**

1. Worry that it might be hacked
2. Not sure who might be able to see things I post
3. Worry things I post might be seen by my employer
4. Worry I might be contacted by people I don't know
5. Worry that I'll receive SPAM messages/viruses/spyware
6. Worry that other people might be able to find my location via the app
7. Not sure where my messages might be stored

8. I do not have any concerns about any of the messaging services I use
9. Other [WRITE IN]

**ASK ALL**

Q7. Have you ever stopped using and/or deleted an app because you were concerned about its security? (e.g. concern that your messages and photos might not be stored securely, concern you might be hacked, worried about being contacted by people you don't know).

**SINGLE CODE**

1. Yes
2. No
3. Can't remember

**ASK ALL**

Q8. When you sign up to an app, you often have to provide personal information in order to complete the sign-up process and agree to the provider's terms and conditions. Thinking back to when you last signed up to an app, how confident are you that you fully understood what the provider would do with your personal data?

**SINGLE CODE**

1. Very confident
2. Fairly confident
3. Not very confident
4. Not at all confident

**ASK FOR EACH SERVICE IF Q2=1-4**

Q9. If the service you use was not working for more than a few minutes for any reason when you wanted to use it, which, if any, other service would you use instead?

ROWS— ask ONLY for 2\_1, 2\_2, 2\_3, 2\_6, 2\_8, 2\_9, 2\_11, 2\_13, 2\_15, 2\_16, 2\_17, 2\_18, 2\_19, 2\_20, 2\_22 **Q2=1-4**

**Do not show same service chosen for ROW**

**GRID**

<b>Q9 Service used instead: columns</b>
Q9_1 SMS text messages on a mobile
Q9_2 Voice calls on a mobile
Q9_3 Voice calls on a landline
Q9_4 Discord
Q9_5 Facebook Messenger
Q9_6 Facetime
Q9_7 Google Meet
Q9_8 iMessage (online messages, not SMS)
Q9_9 Skype
Q9_10 Snapchat

Q9_11 Microsoft Teams
Q9_12 Telegram
Q9_13 Viber
Q9_14 WhatsApp
Q9_15 Zoom
Q9_16 Other
Q9_17 Wouldn't use any other service instead/would wait until the service was available again (exclusive)

**ASK Q10 code NOT Q9\_16-17 for each at Q9 (FOR EACH SERVICE RESPONDENT WOULD USE A BACKUP FOR)**

Q10. How satisfied are you with using [INSERT code from Q9] in place of [INSERT service from Q9 ]?

1. **Very satisfied**
2. **Fairly satisfied**
3. **Neither satisfied nor dissatisfied**
4. **Fairly dissatisfied**
5. **Very dissatisfied**
6. **Don't know**

## **MAX DIFF**

### **Q11**

Sometimes services run more slowly than normal or are unavailable when you want to use them. We are interested in finding out how various types of service interruptions would affect you.

You are going to be shown a series of screens, each with a set of five different scenarios. For each set we would like you to select the one which would affect you **most** and the one which would affect you **least**.

You will see that some scenarios are repeated in the questions, that's OK they are just shown in different combinations.

1. Total internet outage – you can't access any *online* service via any of your devices.
2. Total home broadband outage – your broadband (including your home Wi-Fi) won't work.
3. A mobile data outage – your mobile data won't work.
4. Your home broadband (including your home Wi-Fi) is running slow (i.e. significant lag preventing you watching video or playing online games, but you can send messages and read text).
5. Your mobile data is running slow (i.e. significant lag preventing you watching video or playing online games, but you can send messages and read texts).
6. Texting on you mobile isn't working at all
7. Voice calling on your mobile isn't working at all
8. Emergency calling on your mobile isn't working at all

9. Your landline telephone isn't working at all
10. Main public service broadcasters (e.g. BBC1, ITV, Channel 4) aren't working at all
11. WhatsApp isn't working at all
12. Telegram isn't working at all
13. Signal isn't working at all
14. Outlook isn't working at all
15. Microsoft Teams isn't working at all
16. Gmail isn't working at all a
17. Zoom isn't working at all
18. Google Meets isn't working at all
19. Facebook Messenger isn't working at all
20. BBC iPlayer isn't working at all
21. Netflix isn't working at all
22. Prime video isn't working at all
23. YouTube isn't working at all
24. Facebook isn't working at all
25. Instagram isn't working at all
26. TikTok isn't working at all
27. Amazon Alexa isn't working at all
28. Google home assistant isn't working at all
29. Google search isn't working at all
30. Chrome isn't working at all
31. The App Store isn't working at all
32. The Play Store isn't working at all
33. NHS.co.uk isn't working at all
34. Gov.co.uk isn't working at all
35. Your online banking app isn't working at all

## ASK ALL

### MULTICODE GRID

**Q12.** There are many things that could affect the reliability of online, mobile and broadcasting services. Please can you indicate who you might blame, or view as responsible, for each of the following types of failure? This includes organisations who *might* have caused the issue, or organisations who *should* have prevented it.

#### ROWS

1. Total internet outage – you can't access any services.
2. Total broadband outage – your broadband (incl. Wi-Fi) won't work.
3. A mobile data outage – your mobile data won't work.
4. Your broadband (incl. Wi-Fi) is running slow. (i.e. significant lag preventing you watching video or playing online games, but you can send messages and read text).
5. Your mobile data is running slow. (i.e. significant lag preventing you watching video or playing online games, but you can send messages and read text).
6. A number of services aren't working, including Netflix and BBC iPlayer.
7. A number of services aren't working, including WhatsApp and your online banking app
8. Only Netflix isn't working.

9. Only BBC iPlayer isn't working
10. Facebook isn't working.
11. Your Online Banking isn't working.

**Show 12\_10 if code 6 or 8**

**Show 12\_11 if code 6 or 9**

**Show 12\_12 if code 7 or 10**

**Show 12\_13 if code 7 or 11**

#### COLUMNS

- 12\_1 Your broadband provider (e.g. BT, Virgin, PlusNet etc)
- 12\_2 Your mobile data provider (e.g. EE, Vodafone, Virgin Media O2, Tesco Mobile)
- 12\_3 Public Cloud providers (e.g. AWS, Microsoft Azure, Google Cloud)
- 12\_4 Other internet related services or infrastructure ~~[WRITE IN]~~
- 12\_5 The Government
- 12\_6 The Competition Markets Authority (CMA)
- 12\_7 Ofcom
- 12\_8 The Information Commissioners Office (ICO)
- 12\_9 The Financial Conduct Authority (FCA)
- 12\_10 Netflix
- 12\_11 The BBC
- 12\_12 Meta (the owner of Facebook and WhatsApp)
- 12\_13 Your bank

#### ASK ALL

#### GRID

Q13. For each of the following services, how many times do you consider it to be **acceptable** to have outages (i.e. times at which the service is inaccessible or not working for more than a few minutes) over the period of one year?

ROWS randomise

- 13\_1 Text service on your mobile
- 13\_2 Voice calls on your mobile
- 13\_3 Calling Emergency services on your mobile
- 13\_4 Voice calls on your landline
- 13\_5 Fixed internet in your home (broadband / Wi-Fi)
- 13\_6 Internet access on your mobile
- 13\_7 WhatsApp
- 13\_8 Microsoft Teams
- 13\_9 Outlook
- 13\_10 Zoom
- 13\_11 iPlayer
- 13\_12 Netflix
- 13\_13 NHS.co.uk website
- 13\_14 Gov.uk website

COLUMN

1. Never
2. Once
3. Twice
4. Three to five times
5. Six to ten times
6. Eleven or more times
7. Don't know

ASK ALL

**GRID**

Q14. And how many outages (i.e. times at which the service is inaccessible or not working for more than a few minutes) do you realistically **expect** to experience per year?

ROWS randomise as Q13

Q14\_1. Text service on your mobile

Q14\_2. Voice calls on your mobile

Q14\_3. Calling Emergency services on your mobile

Q14\_4. Voice calls on your landline

Q14\_5. Fixed internet in your home (broadband / Wi-Fi)

Q14\_6. Internet access on your mobile

Q14\_7. WhatsApp

Q14\_8. Microsoft Teams

Q14\_9. Outlook

Q14\_10. Zoom

Q14\_11. iPlayer

Q14\_12. Netflix

Q14\_13. NHS.co.uk website

Q14\_14. Gov.uk website

COLUMN

1. Never
2. Once
3. Twice
4. Three to five times



5. Six to ten times
6. Eleven or more times

#### **GRID**

Q15. In the last year, how many times have you experienced a loss of service (i.e. a time when the service was inaccessible or not working for more than a few minutes) from your current communications providers?

#### **ROWS**

Q15\_1. Mobile ask if 1\_2 = 2

Q15\_2. Broadband ask if 1\_3=2

Q15\_3. Landline ask if 1\_1=2

#### **COLUMN**

1. Never
2. Once
3. Twice
4. Three to five times
5. Six to ten times
6. Eleven or more times
7. Don't know

**ASK ALL WHO HAVE LOST SERVICE AT LEAST ONCE IN THE PAST YEAR AT Q15**

**ASK IF CODE 2-6 IS SELECTED for ANY 1-3 Q15.**

#### **GRID MULTICODE**

#### **ROWS**

Q16. What did you do when you lost service on your service?

Q16\_1. Mobile ask if 1\_2 = 2

Q16\_2. Broadband ask if 1\_3=2

Q16\_3. Landline ask if 1\_1=2

COLUMN

1. Tried to fix it myself (e.g. turned the router off and on, moved the router, restarted the mobile phone, took mobile phone to different room or outside)
2. Called my provider
3. Looked at my provider's website
4. Just waited until the service was working again
5. Other [WRITE IN]

Q17a. If an emergency happened in your home, what is the main method you would use contact the Emergency Services (Police, Fire, Ambulance)?

**SINGLE CODE randomise**

1. By calling 999 from a mobile using my network service
2. By calling 999 from a landline
3. By calling 999 using a mobile over Wi-Fi
4. By using WhatsApp
5. By using another messaging app

Q17b. And in what other ways do you think it is possible to contact the Emergency Services?

**SELECT ALL THAT APPLY randomise as Q17a DO NOT SHOW option chosen at Q17a**

1. By calling 999 from a mobile using my network service
2. By calling 999 from a landline
3. By calling 999 using a mobile over Wi-Fi
4. By using WhatsApp
5. By using another messaging app

Q18. If you wanted to compare the relative reliability of different communications providers, where would you look for information? By 'reliability', we mean the degree to which the service operates without faults or interruptions.

**MULTICODE randomise**

1. Provider websites
2. Price comparison websites (e.g. USwitch, Compare the Market)
3. Performance benchmarking websites (e.g. Umlaut, Ookla speedtest.net)
4. Ofcom website
5. Which?
6. Ask other people about their experiences of providers
7. Ask on a community website (e.g. NextDoor, local Facebook groups)
8. Ask social media sites
9. Other [WRITE IN]

Q19. Before you signed up to your current mobile and fixed broadband providers, did you or anyone else in your household look into how reliable their service is? (i.e. the service itself, not the provider's customer service)

**GRID SINGLE**

ROW

Q19\_1. Mobile service ask if 1\_2=2

Q19\_2. Fixed Broadband service ask if 1\_3=2

COLUMN

1. Yes
2. No
3. Can't remember

Q20. How satisfied are you with the reliability of your communications services?

**GRID SINGLE**

ROW

Q20\_1. Mobile service ask if 1\_2=2

Q20\_2. Fixed Broadband service ask if 1\_3=2

COLUMN

1. Very satisfied
2. Fairly satisfied
3. Neither satisfied nor dissatisfied
4. Fairly dissatisfied
5. Very dissatisfied
6. Don't know

~~ASK ALL WHO ARE NOT VERY/NOT AT ALL SATISFIED with their fixed broadband service~~

~~ASK IF 4,5 in Q24\_2 is selected~~

**ASK ALL**

Q25. Which provider do you use for your mobile phone service? Please indicate which company you pay for this service (i.e. voice calls, data and texts), not the brand of your handset.

**SINGLE CODE**

If you use more than one provider, please answer about your MAIN provider.

1. BT

2. EE
3. Giffgaff
4. O2
5. Sky
6. Tesco Mobile
7. Three
8. Virgin Mobile
9. Vodafone
10. Other provider – SPECIFY **OPEN END**
11. Don't know/Can't remember
12. Do not use a mobile phone

Q26. Which provider do you use for your fixed broadband service?

**SINGLE CODE**

If you use more than one provider, please answer about your MAIN provider.

1. BT
2. EE
3. PlusNet
4. Sky
5. TalkTalk
6. Virgin Media
7. Vodafone
8. Other provider – SPECIFY **OPEN END**
9. Don't know/Can't remember
10. Do not have a fixed broadband service

**NOTE TO SCRIPTER**

**Please display the following message on the final screen:**

During the interview you were asked whether you thought you could contact the emergency services using WhatsApp and other messaging apps. Please be advised that it is NOT POSSIBLE to contact the emergency services using a messaging app. the only way to contact emergency services is by calling 999 from a landline, mobile or public call box.