

Number Portability Focus Groups
 -- Contact Sheet --

(CIRCLE APPROPRIATE GROUP)	<u>Small Business</u> 1-10 employees	<u>Large Business</u> 100+ employees	<u>Medium Business</u> 11-99 employees	<u>Defectors</u> 11+ employees
San Francisco: Thursday, September 29	12:00 pm	5:30 pm	7:30 pm	
Monday, October 10				6:00 pm
Los Angeles: Monday, October 3	12:00 pm	5:30 pm	7:30 pm	

Name: Mr. Ms. Mrs. _____

Title: _____

Company: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: (work): () _____ (home): () _____

(fax): () _____

Date	Time	Recruiter

Number of employees: _____ Changed phone # or area code? YES NO

Number of locations: _____ Industry: _____

Number of lines: _____

Local/toll bill: \$ _____ per month

Long distance bill: \$ _____ per month

- Use:
- Voice mail 1
 - Fax machine 2
 - Modem 3
 - 800 number 4
 - Yellow Pages 5

Number Portability Focus Groups
-- Screening Questionnaire --

NOTE: GROUPS ARE TO BE RECRUITED & CONDUCTED ON A BLIND BASIS

INTRO: Hello, this is _____ with ConStat, a market research firm in San Francisco. May I please speak to the person who is responsible for or directly involved in making decisions about your business's local telephone service? (IF NECESSARY: This is not a sales call.)

REINTRODUCE: Hello, this is _____ with ConStat, a market research firm in San Francisco. We are conducting a study about upcoming changes in local telephone services. I am calling to extend an invitation to you to participate in a focus group.

1. Are you the person who would be responsible for selecting your company's telephone provider?

- | | | |
|------------------|---|------------------------------------|
| Yes | 1 | (CONTINUE) |
| No | 2 | (ASK FOR REFERRAL AND REINTRODUCE) |
| Don't know | X | |

2. Which company do you currently use for your local telephone service? (DO NOT READ) For long distance service? (DO NOT READ. CIRCLE ALL MENTIONS AND CONTINUE)

	<u>LOCAL</u>	<u>TOLL</u>		<u>L.D.</u>
Pacific Bell	1	1	(CONTINUE)	1
GTE	2	2	(TERMINATE)	2
AT&T	3	3		3
Sprint	4	4		4
MCI	5	5		5
Cable & Wireless	6	6		6
Allnet	7	7		7
OTHER (SPECIFY _____) .	9	9	(RECRUIT FOR DEFECTORS GROUP ONLY)	9
DK/NA	X	X	(TERMINATE)	X

3. What is the total number of full and part-time employees your company has at all of its locations in California? Is it... (READ CATEGORIES):

- | | | |
|--------------------------------|---|-----------------------------|
| 1-10 employees | 1 | (CHECK QUOTAS AND CONTINUE) |
| 11-99 employees, or | 2 | |
| 100 or more employees | 3 | |
| (DO NOT READ) REFUSED/DK | X | (THANK AND TERMINATE) |

4. How many office locations does your company have in California? (RECORD BELOW)

NUMBER OF LOCATIONS: _____ | (RECRUIT A MIX OF SINGLE AND MULTIPLE LOCATION BUSINESSES)

5. How many telephone lines does your company have at this location, including voice, fax and modem communications, but not including any 800 or WATS numbers? (RECORD BELOW)

NUMBER OF LINES: _____ | (RECRUIT MAXIMUM OF 2 PER GROUP WITH ONE LINE ONLY).

6. Approximately what is your company's total monthly telephone bill for local telephone service (including toll)? (RECORD BELOW) For long distance service? (RECORD BELOW)

MONTHLY LOCAL/TOLL BILL: \$ _____ (RECRUIT SPREAD)

MONTHLY LONG DISTANCE BILL: \$ _____

7a. Which of the following telecommunications products do you currently use?

	<u>YES</u>	<u>NO</u>	
Voice mail	1	2	(RECRUIT MIX OF BUSINESSES WITH AND WITHOUT THESE SERVICES)
Fax machines	1	2	
Modems	1	2	
Inbound 800 phone number	1	2	

ASK Q. 7b.

7b. Is your main business number for customer or client contact an 800 number?

YES 1 | (MAXIMUM 2 PER GROUP)

NO 2 | (CONTINUE)

DK/NA X |

8. Does your company advertise in the Yellow Pages?

YES 1 |

NO 2 | (RECRUIT HALF OF EACH-- NOT APPLICABLE FOR LARGE BUSINESS GROUPS)

DK X |

9. Has your company ever changed its business telephone number or had its area code changed?

YES 1 | (RECRUIT MAXIMUM OF 4 PER GROUP)

NO 2 |

DK X |

10. What is your business's primary industry? (RECORD BELOW)

_____ | (RECRUIT VARIETY OF INDUSTRIES)

11. Do you or does anyone in your household work for any of the following:

- A telephone/telecommunications company or consultant 1
- An advertising or public relations agency 2 (THANK AND TERMINATE)
- A market research company 3
- None of the above X (CONTINUE)

12. When was the last time you participated in a focus group regarding telecommunications services?

- Within the past six months 1 (TERMINATE)
- Over six months ago 2 (CONTINUE)
- Never 3
- Don't know X (TERMINATE)

We are conducting a focus group to hear how some potential changes in the telecommunications industry might affect your company's local telephone services.

We are interested in a wide range of opinions and would very much like you to participate. The discussion will be held on:

SAN FRANCISCO

LOS ANGELES

Thursday, September 29

Monday, October 3

SMALL: 12:00 pm
(1-10 employees)

12:00 pm

MEDIUM: 7:30 pm
(11-99 employees)

7:30 pm

LARGE: 5:30 pm
(100+ employees)

5:30 pm

DEFECTORS: Monday, October 10
(11+ employees) 6:00 pm

The discussion will last about two hours and food and refreshments will be served. In appreciation of your time and opinions, and to reimburse you for any parking expenses you incur, you will receive _____

SMALL BUSINESS GROUPS: \$100.00

MED./LARGE BUSINESS GROUPS: \$100.00

DEFECTORS: \$100.00

Will you be able to attend? (IF RESPONDENT HESITATES): Your opinions are very important and we think you will enjoy the discussion.

- IF YES (RECORD YY ON CONTACT SHEET AND CONTINUE)
- IF NO (THANK AND TERMINATE)

Thank you. The discussion will be held at:

SAN FRANCISCO:

ConStat, Inc.
450 Sansome Street, Suite 1100
San Francisco

LOS ANGELES:

Adept, Inc.
345 North Maple Drive, Suite 325
Beverly Hills

We will be sending you a confirmation letter and map to the facility. May I please confirm your mailing address?
(RECORD ON CONTACT SHEET)

Thank you very much for your time. We look forward to seeing you on September 29th/October 3rd/ October 10th. If for any reason you are unable to attend, please call ConStat at (415) 274-6600.

PACIFIC BELL
NUMBER PORTABILITY
- Moderator's Guide -

	NOTES:
<p>I. INTRODUCTION AND SET UP</p> <ul style="list-style-type: none">• We are conducting this study to determine how future changes and competition in local telephone services might affect decisions about your businesses telecommunications. (BLIND STUDY)• Set-up rules:<ul style="list-style-type: none">- Need for audio-taping / video-taping- Client monitoring- Ensure full confidentiality of remarks- No right or wrong answers• Participants introduce each other:<ul style="list-style-type: none">- Company name & industry- Current telephone company(s)- Number of telephone lines / locations- Type of telephone system used	<p>10 - 15 MINUTES</p>
<p>II. CURRENT USE OF BUSINESS TELEPHONE NUMBER(S)</p> <ul style="list-style-type: none">• How do customers, clients, suppliers, friends contact your company? What telephone number(s) do they call?<ul style="list-style-type: none">- For different departments?- For different locations?- For specific employees?- For internal communications?- FAX- Modem <p>FOR EACH NUMBER:</p> <ul style="list-style-type: none">- Who calls this number? How many different callers?- How many calls are received per hour/day/week?- How are calls handled internally (e.g., live operator, transfers, voice mail, etc.)? <ul style="list-style-type: none">• What is most important type of call/caller?• How do different callers usually get your telephone number? (originally, in the first place)<ul style="list-style-type: none">- From publications- Directly from employees- From 411/directory information- Other???	<p>15 - 20 MINUTES</p>

- **Where are your business's telephone numbers published? Where do they appear? (IF NECESSARY, PROBE:)**
 - **Radio/TV advertising**
 - **Yellow Pages advertising**
 - **Print advertising**
 - **Business cards**
 - **Business stationery**
 - **Sales/product information**
 - **Products**
 - **Other???**

- **Where else might you find your business number listed?**
 - **Address books?**
 - **Speed dialers?**

III. LIKELIHOOD TO SWITCH TELEPHONE NUMBER / EXPLORATION OF POTENTIAL COST DEFRAYERS

20 - 25 MINUTES

In the future, changes may allow competition for providing local telephone service including dial tone and toll.

TEST COMPETITIVE OFFERS WITH NO NUMBER CHANGE

- If a different company offered you _____, would you switch your service? Why? Why not?

IF WILLING TO SWITCH:

- Switch all or some lines? Which ones?

IF UNWILLING TO SWITCH:

- Would you be willing to switch only some lines? Why or why not?

> PARITY

> 5% LESS THAN LOCAL (NO NUMBER CHANGE)

(LOCAL = PB local and toll c

> 10% LESS THAN LOCAL (NO NUMBER CHANGE)

> 10% LESS THAN LOCAL AND 10% LESS THAN LONG DISTANCE (NO NUMBER CHANGE)

EXPLORE IMPACT OF HAVING TO CHANGE NUMBER

- What if, in order to get this savings, you had to change your telephone number? Would you still switch? Why or why not?

IF YES:

- How would you handle the change in your number?
- What would you have to do about...
 - Your telephone system
 - Changing company stationery/business cards
 - Notifying clients/customers/suppliers
 - Changing advertisements, etc.
- Would you expect the new provider to help with any of these changes? What would you expect them to do? (PROBE)
 - Provide a standard announcement
 - Provide a customized announcement
 - Provide call forwarding/call transfer
 - \$500 toward the cost of new stationery, business cards?
 - \$1,000 toward the cost of new stationery
 - A free 800 number for 6 months (monthly service, not usage)?

- How long would you need to have an announcement/call forwarding?
 - 1 year
 - 2 years
 - 3 years
 - Permanantly
- Would you be willing to pay for...
 - a standard announcement
 - a customized announcement
 - call forwarding/automatic transfer
- How much would you be willing to pay for these solutions?
- Would you be willing to switch only the telephone lines/numbers that aren't used for incoming calls and keep your incoming numbers with Pacific Bell? Why or why not?
- If yes, which ones would you change(e.g., fax machine, modems, "trailing" lines)?
- If only your prefix changed, and your telephone line numbers remained the same, would this be any easier?

VI. EVALUATION OF SPECIFIC SCENARIOS

10 - 15 MINUTES

DISTRIBUTE QUESTIONNAIRE (= 4 - 5 SCENARIOS)

- We have discussed various different factors that might influence whether you would be willing to switch your telephone number. This brief questionnaire puts all of these factors together to see what your reaction would be in a specific situation.

Please assume that you could switch to any company who was offering local telephone service.

WHEN COMPLETE, SELECT ONE SCENARIO AND EVALUATE:

(IF TIME)

- How likely would you be to switch in this situation? Why or why not?
- What proportion of your lines would you switch? IF NOT 100%: Which lines would you switch?
- What company did you have in your mind as offering this service?
- What company would you prefer for your local telephone service? Why?
- What other companies would you consider?
(UNAIDED, THEN PROBE)
 - AT&T, MCI, Sprint
 - Metropolitan Fiber Systems (MFS), Bay Area Teleport
 - Cable & Wireless, Allnet

Suppose your company moves locations and you have to change your telephone number. You could choose one of the following options...

1. STANDARD ANNOUNCEMENT (NO TRANSFER)

When customers call your old number, they hear a standard automated referral message. The announcement lasts for one year.

"The number you have called, 555-4433, has been changed. The new number is, 333-2211."

2. CUSTOMIZED ANNOUNCEMENT (NO TRANSFER)

When customers call your old number, they hear a customized referral message developed by your company which lasts one minute and is in your own voice. The announcement lasts for one year.

"Thank you for calling ABC Rentals! Our new telephone number is 333-2211. To find out about our new party rental specials, please record this number and dial it now. A rental specialist is waiting for your call."

3. AUTOMATIC TRANSFER (NO ANNOUNCEMENT)

When customers call your old number, they are automatically transferred to your company. The new number is not announced (this must be done internally, e.g., by receptionist). The automatic transfer lasts for one year.

4. STANDARD ANNOUNCEMENT AND AUTOMATIC TRANSFER

When customers call your old number, they hear a standard referral message then are automatically transferred to your company. The announcement lasts for one year.

"The number you have called, 555-4433, has been changed. The new number is, 333-2211. Please stay on the line and your call will be connected."

5. CUSTOMIZED ANNOUNCEMENT AND AUTOMATIC TRANSFER

When customers call your old number, they hear a customized referral message developed by your company which lasts one minute and is in your own voice. Then they are automatically transferred to your company. The announcement lasts for one year.

"Thank you for calling ABC Rentals! Our new telephone number is 333-2211. To find out about our new party rental specials, please stay on the line and a rental specialist will be with you shortly."

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NUMBER PORTABILITY
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- **Where are your business's telephone numbers published? Where do they appear? (IF NECESSARY, PROBE:)**
 - Radio/TV advertising
 - Yellow Pages advertising
 - Print advertising
 - Business cards
 - Business stationery
 - Sales/product information
 - Products
 - Address books
 - Speed dialers

IIA. EXPLORATION OF DEFECTION BEHAVIOR

- **Who is your local telephone provider? Your toll provider? Your long distance provider?**
- **What do each of these companies provide? (CLARIFY DISTINCTION BETWEEN TOLL AND DIAL TONE)**
- **What company used to provide your toll service? When did you switch?**
- **What were the main reasons why you switched? Anything else? (UNAIDED, THEN PROBE)**
 - Price
 - Single point of contact
 - Single bill
 - Improved service or features
- **What changes or events were happening in your business at the time? (e.g., moving, new phone system, new TCM, etc.)**
- **What were the barriers to switching, if any? (UNAIDED, THEN PROBE)**
 - Additional equipment/dialers
 - Other change in telephone system (Number change??)
 - Concern about reliability or service
- **How did this change occur? Please tell us the steps that were involved starting with the initial contact. (UNAIDED, THEN PROBE):**
 - Original offer from company
 - Concerns
 - Extent of meetings/negotiations with company
- **How flexible was the company in meeting your demands/requests during the negotiations?**
- **How satisfied are you with their service?**
- **Is there anything else you would like to receive from them? (PROBE FOR DIAL TONE/ACCESS)**
- **What are your impressions of Pacific Bell now?**

III. LIKELIHOOD TO SWITCH TELEPHONE NUMBER / EXPLORATION OF POTENTIAL COST DEFRAYERS

20 - 25 MINUTES

In the future, changes may allow competition for providing local telephone service including dial tone and toll.

TEST COMPETITIVE OFFERS WITH NO NUMBER CHANGE

- If a different company offered you _____, would you switch your service? Why? Why not?
- > **PARITY (SAME SERVICE/SAME PRICE)**
- > **5% LESS THAN LOCAL (NO NUMBER CHANGE)**
- > **10% LESS THAN LOCAL (NO NUMBER CHANGE)**
- > **10% LESS THAN LOCAL AND 10% LESS THAN LONG DISTANCE (NO NUMBER CHANGE)**
- > **USE 20% IF NECESSARY**

(LOCAL = PB local and toll c

EXPLORE IMPACT OF HAVING TO CHANGE NUMBER

- What if, in order to get this savings, you had to change your telephone number? Would you still switch? Why or why not?
- IF YES:
- How would you handle the change in your number?
 - What would you have to do about...
 - Your telephone system
 - Changing company stationery/business cards
 - Notifying clients/customers/suppliers
 - Changing advertisements, etc.
- IF NO:
- What can the other company do to change your mind (assuming you have to change your number)? (FIRST UNAIDED, THEN PROBE)
 - Provide a standard announcement
 - Provide a customized announcement
 - Provide call forwarding/call transfer
 - \$500 toward the cost of new stationery, business cards?
 - \$1,000 toward the cost of new stationery
 - A free 800 number for 6 months (monthly service, not usage)?

- How long would you need to have an announcement/call forwarding?
 - 1 year
 - 2 years
 - 3 years
 - Permanantly
- Would you be willing to pay for...
 - a standard announcement
 - a customized announcement
 - call forwarding/automatic transfer
 - a longer activation period
- How much would you be willing to pay for these solutions?
- Would you be willing to switch only the telephone lines/numbers that aren't used for incoming calls and keep your incoming numbers with Pacific Bell? Why or why not?
- If yes, which ones would you change(e.g., fax machine, modems, "trailing" lines)?
- If only your prefix changed, and your telephone line numbers remained the same, would this be any easier?

VI. EVALUATION OF SPECIFIC SCENARIOS

10 - 15 MINUTES

DISTRIBUTE QUESTIONNAIRE (≈ 4 - 5 SCENARIOS)

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Please assume that you could switch to any company who was offering local telephone service.

WHEN COMPLETE, SELECT ONE SCENARIO AND EVALUATE:

(IF TIME)

- How likely would you be to switch in this situation? Why? Why not?
- What proportion of your lines would you switch? IF NOT 100%: Which lines would you switch?
- What company did you have in your mind as offering this service?
- What company would you prefer for local telephone service? Why?
- What other companies would you consider?
(UNAIDED, THEN PROBE)
 - AT&T, MCI, Sprint
 - Metropolitan Fiber Systems (MFS), Bay Area Teleport
 - Cable & Wireless, Allnet

THANK YOU.... (END)

ConStat, Inc.
450 Sansome Street
San Francisco, CA 94111

Number Portability Business Survey
-- Contact Sheet --
BLIND

ID#: _____ (1:4)
APPROVAL: _____
Q. MGR: _____
DP MGR: _____
P. DIR: _____

C94-649

RECORD NUMBER DIALED BELOW:

TELEPHONE NUMBER: (____) _____

CITY: _____

RESPONDENT NAME: _____

COMPANY NAME: _____

TIME STARTED: _____

EMPLOYEES (6)
1 - 91
10 - 992
100 +3
DID Numbers (7)
Yes1
No/DK2
SIC CODE (8:11)

(INTRO): Hello. I'm _____ with ConStat, a national market research firm in San Francisco.

S0. Is your company involved in providing or selling any ... (READ LIST)

- Telecommunications or telephone services.....1 | (TERMINATE)
- Market research services or consulting2 |
- (DO NOT READ) NONE OF ABOVE.....3 | (CONTINUE)

May I please speak to the person in your organization who is most responsible for selecting your telecommunication service providers for your company. (IF NECESSARY, SAY: I am not selling anything. This is a research survey only.)

DM INTRO: Hello. I'm _____ with ConStat, a national marketing research company. We are conducting a study on telecommunications, and are very interested in your opinions and expertise.

S1a. Are you the person most responsible for selecting telecommunications service providers for your company?

- YES.....1 | (CONTINUE WITH S1b)
- NO.....2 | (ASK FOR REFERRAL TO DM)

(NOTE: IF DECISION MAKER AT OTHER CA LOCATION, GET REFERRAL AND RECORD BELOW.
IF DM OUTSIDE OF CA, TERMINATE AND RECORD ON SAMPLE AS 18)

S1b. What is your title? (RECORD SPECIFIC TITLE)

TITLE: _____ (12:13)

So, just to verify, if your company was planning to select a telecommunications service provider or change service providers, you would be responsible for that decision? (VERIFY DM THEN CONTINUE)

S2a) In total, how many full-time employees does your company have in the US? (RECORD BELOW)

NUMBER OF EMPLOYEES: (14:18)

S2b) How many of these employees are in California? (RECORD BELOW)

NUMBER OF EMPLOYEES: (19:23)

S3a) How many different locations does your company have in California? (RECORD BELOW) (24:26)
NUMBER OF LOCATIONS IN CA: _____ --> (IF ONLY 1, SKIP TO S4)

S3b) Would you say that decisions about your telecommunications service are... (READ LIST AND RECORD ONE RESPONSE BELOW)

Typically made by a single person for all of your California locations, or1--> (SKIP TO S4) (27)

Made by a number of different people for individual locations2--> (ASK S3c)

(DO NOT READ) DK/NAX--> (ASK S3c)

S3c) How many of your California locations are you personally responsible for?(RECORD BELOW)

CA LOCATIONS RESPONSIBLE FOR: _____ (28:30)

S4a) Do you ever use a telecommunications consultant to help with decisions about service providers?

YES.....1 (31)
NO.....2
DK/NAX

S4b) And, what proportion of your time is spent in your role as telecommunications decision-maker? For example, is it 100% of your job responsibility or just a portion of your job responsibilities?

PERCENT AS DECISION-MAKER..... % (32:34)

S5a) In total, how many telephone bills do you receive each month?

TOTAL NUMBER OF BILLS PER MONTH..... (35:36)

S5b) How many different companies do you currently receive bills from each month?

TOTAL COMPANIES PER MONTH..... (37:38)

S6a) The three services we want to discuss are long distance service, toll calls, also know as "service area" c "local long distance" calls, and local service. Were you aware of these three different types of calls?

YES.....1 | (SKIP TO S6b) (39)
NO.....2 | (READ ALL DESCRIPTIONS. CLARIFY
DK/NAX | ALL TYPES BEFORE CONTINUING.)

Local phone service includes the local calls your company makes , for example across the street. It also includes the line charges that you pay per month per telephone line. This service is usually provided by local phone companies like Pacific Bell and GTE.

Long distance service includes calls made across the state, for example from Los Angeles to San Francisco, out of California or out of the country. These calls usually are provided by companies like AT&T, MCI and Sprint.

Toll calls, also know as "service area" or "local long distance" calls, are calls within California which are further away than local calls but not as far away as long distance calls, and usually include a per minute charge. This service is traditionally provided by local telephone companies such as Pacific Bell and GTE, but there are also a number of other smaller companies that can also handle these calls. Beginning in January of 1995, other long distance companies, such as AT&T, MCI and Sprint will also be able to handle these calls.

S6b) READ RESPONDENTS AN EXAMPLE OF TOLL CALLS BASED ON AREA CODE OF LOCATION.

714/909/805/818:

Just to clarify, calls between Anaheim and Los Angeles, for example, would be toll calls.

619: Just to clarify, calls between San Diego and El Cajon, for example, would be toll calls.

415: Just to clarify, calls between San Francisco and San Ramon, for example, would be toll calls.

510: Just to clarify, calls between Oakland and Palo Alto, for example, would be toll calls.

S7a) Now, which company do you currently use for local telephone service? (DO NOT READ. CIRCLE ALL RESPONSES. IF MORE THAN ONE, ASK: Which one of these companies provides the majority of your local telephone service? RECORD RESPONSE UNDER PRIMARY)

S7b) And for long distance and international service? (DO NOT READ. CIRCLE ALL RESPONSES. IF MORE THAN ONE, ASK: Which one of these companies provides the majority of your long distance service? RECORD RESPONSE UNDER PRIMARY)

S7c) And for toll calls? (DO NOT READ. CIRCLE ALL RESPONSES. IF MORE THAN ONE, ASK: Which one of these companies provides the majority of your toll service? RECORD RESPONSE UNDER PRIMARY)

	S7a: Local service		S7b: LD/Int'l		S7c: Toll	
	Primary (40:41)	Other (42:43) (48:49)	Primary (50:51)	Other (52:53) (58:59)	Primary (60:61)	Other (62:63) (68:69)
PACIFIC BELL.....	01	01	01	01	01	01
GTE.....	02	02	02	02	02	02
IF ONLY GTE FOR LOCAL, TERMINATE. CODE 30						
AT&T.....	03	03	03	03	03	03
MCI.....	04	04	04	04	04	04
SPRINT.....	05	05	05	05	05	05

(CLARIFY: Usually, unless you make a special arrangement, Pacific Bell handles your local and toll calls. Do you know if Pacific Bell carries these calls for your company? (RECORD RESPONSE))

ACCESS AMERICA.....	06	06	06	06	06	06
ALLNET.....	07	07	07	07	07	07
BAY AREA TELEPORT.....	08	08	08	08	08	08
BITTEL.....	09	09	09	09	09	09
CABLE & WIRELESS.....	10	10	10	10	10	10
CALL AMERICA.....	11	11	11	11	11	11
CENTEX.....	12	12	12	12	12	12
COMM SYSTEMS.....	13	13	13	13	13	13
DIALNET.....	14	14	14	14	14	14
EXECULINE.....	15	15	15	15	15	15
EXPRESS TEL.....	16	16	16	16	16	16
METROMEDIA.....	17	17	17	17	17	17
METROPOLITAN FIBER SYSTEM (MFS).....	18	18	18	18	18	18
PHOENIX.....	19	19	19	19	19	19
TELEPORT COMMUNICATIONS GROUP (TCG).....	20	20	20	20	20	20
THRIFTY TEL.....	21	21	21	21	21	21
WILTEL (Williams Tel).....	22	22	22	22	22	22
WORKING ASSETS.....	23	23	23	23	23	23
OTHER.....	99	99	99	99	99	99
(SPECIFY.....)						

S7a. Overall, would you say you are very satisfied, somewhat satisfied, not very satisfied or not at all satisfied with (READ PRIMARY LOCAL COMPANY)?

S7b. And how satisfied are you with (READ PRIMARY LONG DISTANCE COMPANY)?

IF TOLL COMPANY IS DIFFERENT THAN LOCAL AND LONG DISTANCE COMPANY, ASK:

S7c. And how satisfied are you with (READ PRIMARY TOLL COMPANY)?

	VERY SATISFIED	SOMEWHAT SATISFIED	NOT VERY SATISFIED	NOT AT ALL SATISFIED	DK	
PRIMARY LOCAL TELEPHONE COMPANY.....	4	3	2	1	X	(70)
PRIMARY LONG DISTANCE TELEPHONE COMPANY.....	4	3	2	1	X	(71)
PRIMARY TOLL TELEPHONE COMPANY	4	3	2	1	X	(72)

S8. On average, what is your company's monthly telephone bill for ...

Line charges and local calls..... \$ _____ .00 (205:10)
 Toll service..... \$ _____ .00 (211:16)
 Long distance service..... \$ _____ .00 (217:22)

IF UNABLE TO SEPARATE LOCAL FROM TOLL SERVICE, RECORD UNDER LOCAL AND CIRCLE BELOW:

LOCAL INCLUDES TOLL.....1 (223)

S9a. Which of the following telephone services or products does your company currently use? (READ LIST AND RECORD RESPONSE FOR EACH)

	YES	NO	DK	
Single line phone/1 MBs.....	1	2	X	(226)
Centrex.....	1	2	X	(227)
PBX.....	1	ASK S9b 2	X	(228)
Key System/KSU.....	1	2	X	(229)
Voice mail.....	1	2	X	(230)
T-1's or High Capacity Digital Lines.....	1	2	X	(231)
Least Cost Routing (LCR) or Flexible Route Selection (FRS).....	1	2	X	(232)

(IF YES TO PBX, ASK:)

S9b. Does your company subscribe to or purchase any DID numbers from your local telephone company? (IF NECESSARY: DID numbers are a product offered by local telephone companies. They enable PBX users to purchase a block of telephone numbers (usually 100 numbers) that are used for direct dialing to specific people or extensions.)

YES.....1 (233)
 NO.....2
 DK/NA.....X

We are conducting a mail survey that will explore some of the upcoming changes in the telecommunications industry. This study is very important; the changes being discussed are certain to impact businesses like yours. May I send you the survey? (ONLY IF NECESSARY: The mail questionnaire will take about 10 minutes to complete.)

Yes.....1 (RECORD NAME AND MAILING ADDRESS)
 No.....2 (TRY AGAIN.)

(2ND ATTEMPT):

Your answers really are important. This research may be used to determine how the telecommunications regulations should be structured. Could you please take part?

Yes.....1 (RECORD NAME AND MAILING ADDRESS)
 No.....2 (THANK AND TERMINATE) (CODE AS 60)

VERIFY:

You should receive the survey in the mail in about a week or so. It will be in a large envelope that says "Survey Research Materials Enclosed" on it. Please be sure to look for it in the mail and please fill it out as soon as you receive it. May I please get your name and the address where I should send the survey?

(VERIFY/UPDATE NAME, COMPANY, ADDRESS AND ZIP CODE ON SPACE BELOW. BE SURE TO GET MR./MRS./MS. AND/OR FIRST NAME TO WHOM PACKET SHOULD BE SENT.)

WRITE LEGIBLY AND ASK FOR EXACT SPELLING.

NAME: MR./MRS./MS./MISS _____

TITLE: _____

COMPANY: _____

ADDRESS: _____

CITY: _____ STATE: _____ ZIP : _____ (234:38)

TELEPHONE #: (_____) _____ (240:49)

Thank you very much for agreeing to participate in this study. Please remember, it is important that you personally fill out the questionnaire. We look forward to receiving your completed survey and greatly appreciate your time and opinions.

(250:51)

TIME INTERVIEW COMPLETE: _____ TOTAL TIME: _____

(GET COMPLETE NAME SO SUPERVISOR CAN VERIFY INTERVIEW WAS CONDUCTED.)

TELECOMMUNICATIONS 1995 AND BEYOND

National Research Survey

- California Edition -

v. 2

Conducted by:

CONSTAT, INC.
450 Sansome Street, Suite 1100
San Francisco, CA 94111

SECTION I - YOUR TELEPHONE LINES AND NUMBERS

Throughout this survey, you will be asked questions about your company's telephone lines and numbers. Please read the following descriptions of different types of lines and numbers, then indicate how many of each type your company has.

HOW MANY OF THESE DOES YOUR COMPANY HAVE?

1. 800 NUMBERS..... (11:14)

800 numbers provide inbound, toll-free calling.

2. TELEPHONE LINES AND TRUNKS..... (15:18)

Telephone lines and trunks are the actual wires provided by the telephone company to your office.

TOTAL TELEPHONE LINES AND TRUNKS = Main/published lines + Other lines

a. Main/published lines..... (19:22)

Main/published lines are telephone lines (*other* than 800 numbers) whose numbers:

- appear on printed materials or in advertisements, such as letterhead, TV/radio/print advertising, brochures, Yellow Pages, etc.
- are frequently called to contact your company
- might include your fax number(s).
- most companies have one or two main/published numbers.

Your company's main number is: (_____) _____ - _____ (27:36)

b. Other lines..... (23:26)

Any other telephone lines whose numbers are not published or listed. These lines are not usually dialed directly. They include:

- any other lines that are not the main/published lines to your company.
- lines that are "roll-over" or "trailing" lines that are used to receive additional inbound calls to your main number or for outbound calling.
- lines that are used for outbound calling only.

3. DID NUMBERS..... (37:40)

DID Numbers are a product offered by local telephone companies for PBX users only. If you have DID numbers, you purchase a block of telephone numbers (usually 100 numbers per block) that are used for dialing to specific people or extensions directly, without going through an attendant or receptionist.

6. In total, approximately how many calls are received per day on your company's main/published numbers?
(PLEASE CHECK ONLY ONE)

(41)

- Less than 50 calls received per day..... 1
- 50 - 99 calls received per day 2
- 100 - 249 calls received per day 3
- 250 - 499 calls received per day 4
- Over 500 calls received per day 5

7. Approximately, what proportion of all of your company's telephone calling is inbound versus outbound?
(PLEASE CHECK ONLY ONE)

(42)

- Almost all inbound (e.g., over 90%)..... 1
- Majority is inbound..... 2
- About even inbound and outbound..... 3
- Majority is outbound..... 4
- Almost all outbound (e.g., over 90%) 5

Please answer Question 8 if you have an 800 number.

8. Is your 800 number ... (CHECK ALL THAT APPLY)

(43)

- Used as the main, inbound number for customers and/or clients..... 1
- Printed on letterhead or brochures or used in advertising..... 2

SECTION II - COMPETITION IN LOCAL TELEPHONE SERVICE

You may already be aware of some changes in the telecommunications industry, specifically the advent of competition for toll services. In California, these changes will become official in January, 1995.

Most industry experts predict that, sometime after competition for toll service occurs, competition for LOCAL SERVICE will also be allowed.

When this happens, a company other than your current local telephone company could provide your local and your toll service. (For a description of local and toll service, please see the enclosed "Dictionary of Terms.")

The companies that might offer local service include most long distance companies (e.g., AT&T, MCI, Sprint, Allnet, Cable & Wireless) as well as other companies, such as telemanagement companies and smaller toll companies (e.g., Access America, Centex, Dialnet, Metropolitan Fiber Systems, ThriftyTel, etc.).

If you switched to a different local telephone company...

- The new company would ...
 - Provide your local and toll service, including line charges and local, zone and toll call charges.
 - Provide any other local or line services that you are currently receiving from your current local telephone company, such as Custom Calling Features or Centrex.
 - Provide any new lines you need or make any changes in your service.
 - Handle any problems or repairs, including wiring currently handled by your current local telephone company.
 - Bill you directly. You would no longer receive a bill from your current local telephone company.
- No additional equipment (such as dialers) would be necessary.
- Yellow Pages advertising would be continue to be provided by the company who provides it now (e.g., Pacific Bell Directory, Donnelly Yellow Pages). This company would bill you directly.
- You would not incur any costs for switching your telephone service.

When competition for local service occurs, how likely would you be to consider switching any of your local telephone service from your current local telephone company if there was a 10% savings on your local and toll service, assuming there would be no costs for switching or changes to your telephone system?

(44)

- Very likely to consider switching..... 4
- Somewhat likely to consider switching..... 3
- Not very likely to consider switching 2
- Not at all likely to consider switching 1

The following section of this survey contains a series of offers that companies may present to you to get your company to switch its local telephone service.

TO COMPLETE THE NEXT SECTION OF THE SURVEY, PLEASE:

1. **Look at the enclosed "DICTIONARY OF TERMS" for descriptions of the potential offers.**

2. **Review each offer individually.**
Begin with the first offer (on the next page), then evaluate each one as if it is the first offer made to you.

3. **Indicate how willing you would be to switch any of your "main/published lines" and/or "other lines."** It would be possible to switch only your "other lines" and keep your "main/published lines" with your current local phone company or vice versa.

4. **Specify what percentage of telephone lines you would be willing to switch.** Again, it would be possible to switch only a portion of each type of line, for example 50% of your "other lines," and 50% of your "main/published lines."

Each offer asks only if you would consider switching any of your lines. It is not asking you to commit to actually switching the lines, just whether you would be willing to consider the offer.

A telecommunications company other than your current long distance or local telephone company offers ...

Local and toll service for...

25% less than your current local telephone company for any lines that you switch and...

The telephone numbers change only on the lines that you decide to switch. If you decide to switch main/published numbers, they get an announcement for 2 years.

(1)

[45:48]

1. HOW WILLING WOULD YOU BE TO SWITCH ANY OF THESE LINES TO THIS COMPANY?

	<u>Very</u>	<u>Somewhat</u>	<u>Not very</u>	<u>Not at all</u>		<u>What percent would you move?</u>	
Main/published lines.....	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	[47]	_____ %	[50:52]
Other lines.....	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	[48]	_____ %	[53:55]
DID numbers.....	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	[49]	_____ %	[56:58]

A telecommunications company other than your current long distance or local telephone company offers...

Local, toll and long distance service for...

Same price as your current local telephone company on any lines that you switch and...

The telephone numbers change only on the lines that you decide to switch. If you decide to switch main/published numbers, they get an announcement with transfer for 1 year.

(2)

[59:60]

2. HOW WILLING WOULD YOU BE TO SWITCH ANY OF THESE LINES TO THIS COMPANY?

	<u>Very</u>	<u>Somewhat</u>	<u>Not very</u>	<u>Not at all</u>		<u>What percent would you move?</u>	
Main/published lines.....	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	[61]	_____ %	[64:66]
Other lines.....	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	[62]	_____ %	[67:69]
DID numbers.....	<input type="checkbox"/> 4	<input type="checkbox"/> 3	<input type="checkbox"/> 2	<input type="checkbox"/> 1	[63]	_____ %	[70:72]