REDC

Commission for Communications Regulation

ComReg: WLA/WCA – Business Sector

April 2022

569922

Report Structure

Background/ Methodology

Background & Methodology

- This research seeks to understand business use of and attitudes surrounding product characteristics, switching behaviour and other parameters.
- 300 telephone interviews were conducted amongst a nationally representative sample of SMEs operating in Ireland with a broadband or leased lines connection.
- Interviews were quota controlled by industry sector/company size and region in order to accurately represent the correct profile of Irish business.

Company Size	Number of Interviews Conducted	Weighted Representative Sample
Micro (1-10 Employees)	180	249
Small (11-50 Employees)	70	42
Medium (50-250 Employees)	50	9
Total	300	300

- As with the 2017 research, all interviews were conducted via CATI telephone interviewing.
- Fieldwork was conducted during March 2022.
- Interviews were conducted with the person responsible for telecommunication decision making within each company. In larger companies this was likely to be a specialised person such as an IT manager and for smaller companies this person was likely to be the owner/manager.
- Throughout this report, comparison data from the 2017 survey is shown where relevant.

Note on Sample Size

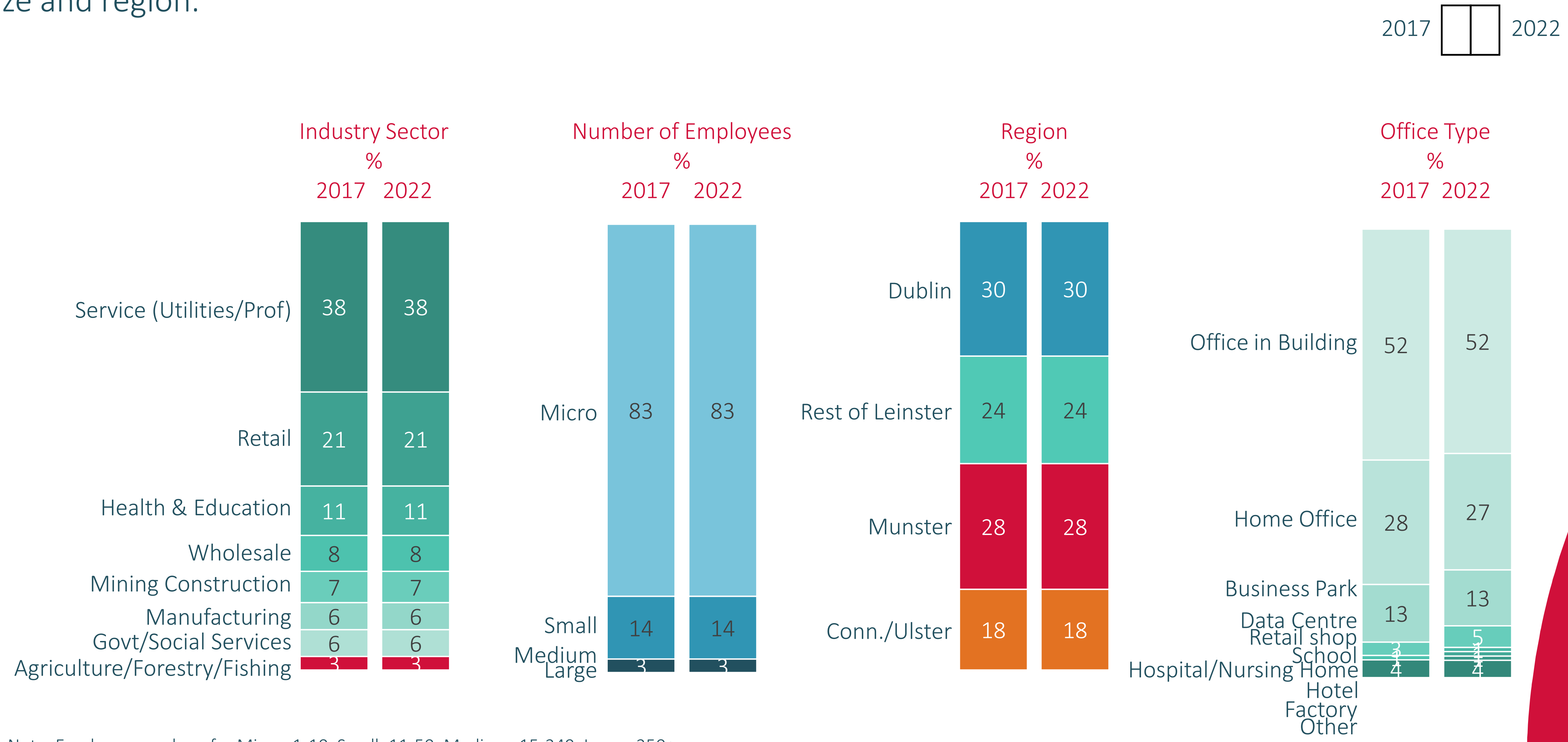
- Some access modes are not commonly used and therefore have very small base sizes. Given the size of the overall sample, the sample size for some access modes was too small to analyse the data. Below is a list of the sample sizes achieved for each primary access type in the survey.

Access Type Broadband Mode	Unweighted Base Size*
Fibre Network	114
Fixed broadband via a traditional fixed telephone line (landline)	102
Leased Line	13
Cable Network	33
Mobile Broadband/Internet Access Over Mobile	11
Satellite Broadband	11

- On filtered questions the base size described above falls further and analysis within each access type will therefore not always be possible.
- All base sizes shown throughout the presentation are unweighted as this represents the true number of interviews conducted.
- If base size falls below 30 this is indicated with a * and caution note

Sample Profile

The surveyed sample was weighted to represent the total business SME market in Ireland by industry sector, size and region.



Note: Employee numbers for Micro=1-10; Small=11-50; Medium=15-249; Large=250+

(Base: All SME Business Decision Makers N = 300)

Connection Details

Access Type by Company Size (Multiple Responses)

Fibre access and Leased Line access have grown since 2017, at the expense of broadband access over a traditional fixed line.

Q2. In your business, which of the following means of accessing services are used?

	Total 2022 (n=300)	Total 2017 (n=300)	No. of Employees 2022: 1-10 (180) %	11-50 (70) %	51-249 (50) %
Broadband access over a traditional fixed line	43%	(56%)	46%	34%	18%
Broadband provided over a Fibre network	38%	(28%)	38%	39%	45%
Broadband service provided over a cable TV	13%	(12%)	11%	27%	19%
Mobile Broadband	8%	(15%)	7%	15%	5%
Fixed wireless connection often provided via an aerial/antennae attached to your business	5%	(5%)	4%	7%	9%
Internet access over Mobile Phone using 3G/4G/5G data package	4%	(8%)	3%	6%	2%
Broadband provided by a Satellite network	3%	(7%)	2%	5%	8%
Any Leased Line	14%	(7%)	14%	9%	38%

Q2.
(Base: All Respondents Who Use Data Connectivity Services N= 300)

Access Type Most Often Used (Single Code)

Fixed broadband is the primary access mode for 90% of SMEs.

Q2/4. Which service do you consider to be your primary/main access mode?

	Total 2022 (n=300)	Total 2017 (n=300)	No. of Employees 2022: 1-10 (180) %	11-50 (70) %	51-249 (50) %
NET Broadband fixed line	90%	(86%)	91%	87%	91%
Broadband access over a traditional fixed line	41%	(50%)	43%	31%	13%
Broadband provided over a fibre network	36%	(23%)	36%	38%	40%
Broadband service provided over a cable TV	12%	(10%)	11%	18%	13%
Mobile Broadband	3%	(5%)	3%	3%	2%
Fixed wireless connection often provided via an aerial/antennae attached to your business	3%	(2%)	3%	2%	6%
Broadband provided by a Satellite network	1%	(5%)	1%	5%	3%
Internet access over Mobile Phone using 3G/4G/5G data package	1%	(1%)	1%	2%	0
Any Leased Line	1%	(3%)	1%	*	25%

Q2/4.

(Base: All Respondents Who Use Data Connectivity Services N= 300)

Access Type Most Often Used (Single Code)

Cable network access is most common in Dublin compared to other parts of the country.

Q2/4. Which service do you consider to be your primary/main access mode?

	Total 2022 (n=300)	Total 2017 (n=300)	By Region 2022			
			Dublin (75) %	ROL[1] (83) %	Munster (86) %	Conn/Ulster (56) %
NET Broadband fixed line	90%	(86%)	91%	90%	87%	92%
Fixed broadband over a traditional fixed telephone line	41%	(50%)	33%	40%	42%	52%
Broadband provided over a Fibre network	36%	(23%)	31%	48%	35%	32%
Broadband service provided over a cable TV	12%	(10%)	25%	2%	10%	5%
Mobile Broadband	3%	(5%)	1%	5%	3%	4%
Fixed wireless connection often provided via an aerial/antennae attached to your business	3%	(2%)	1%	2%	8%	1%
Broadband provided by a Satellite network	1%	(5%)	2%	2%	1%	*
Internet access over Mobile Phone using 3G/4G/5G data package	1%	(1%)	2%	0	1%	0
Any Leased Line	1%	(3%)	2%	*	*	3%

Q2/4.

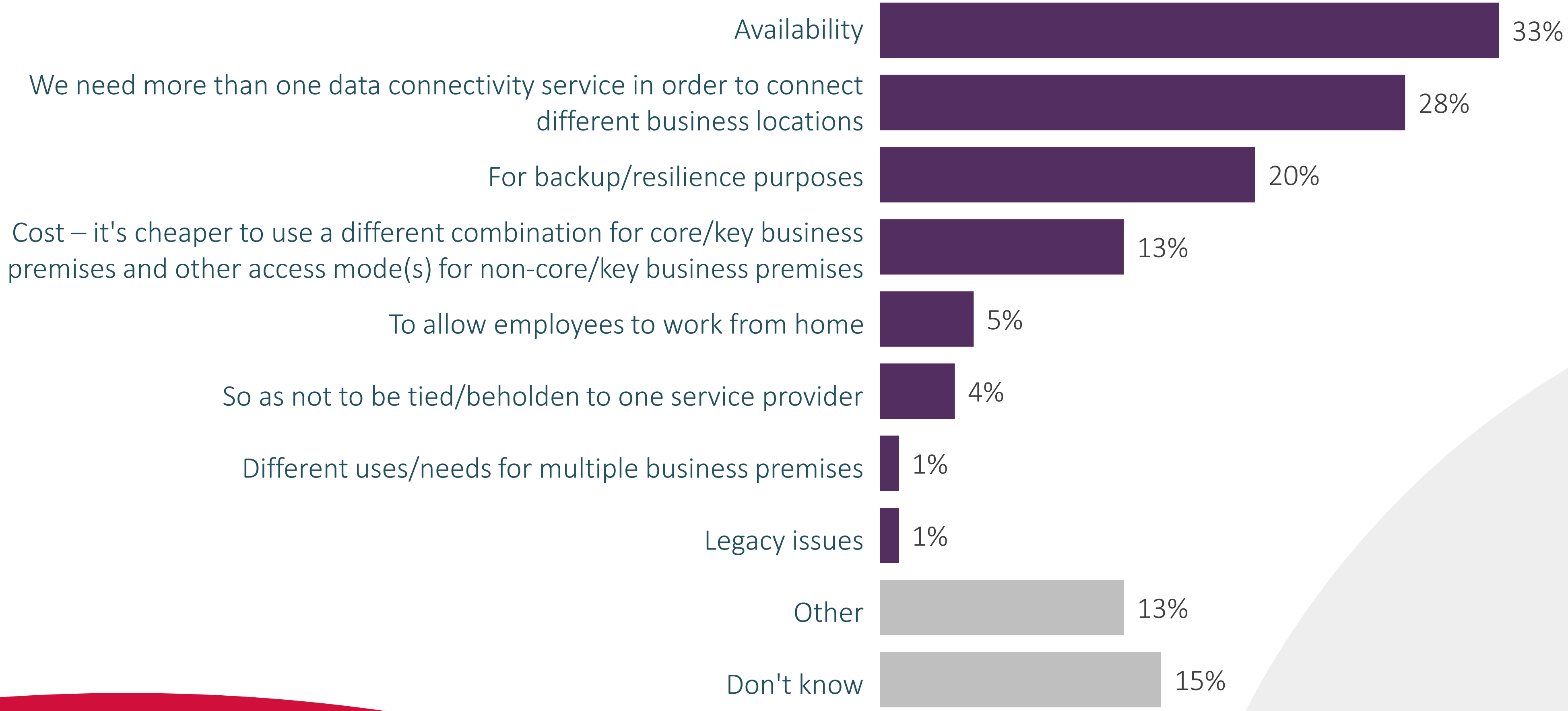
(Base: All Respondents Who Use Data Connectivity Services N= 300)

[1] Rest of Leinster (ROL)

Reasons for using more than one means of data connectivity

Availability is the main reason customers opt to use multiple means of data connectivity

Q6. Why does your organisation use more than one means of data connectivity?



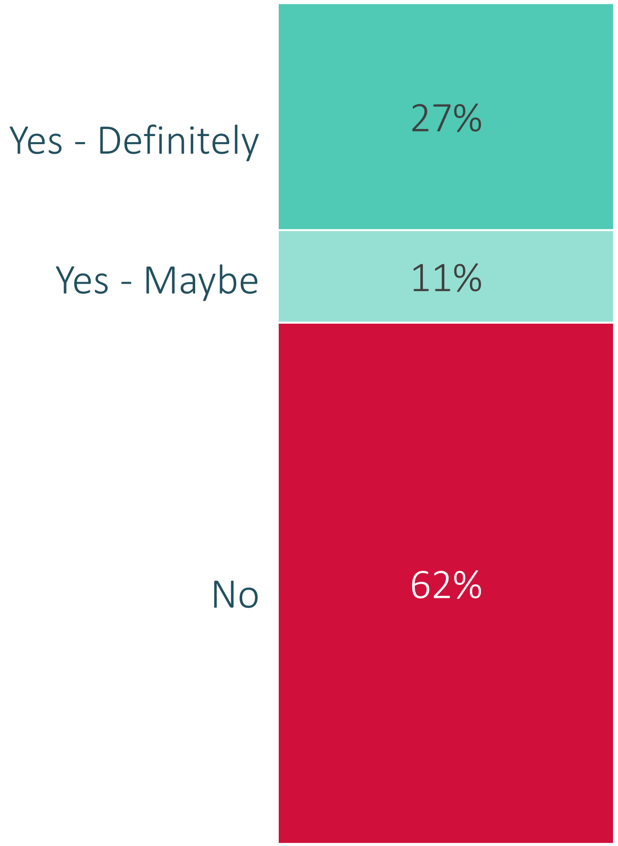
Q6

(Base: All With Broadband And Leased Line, n=44)

Willingness to rely solely on mobile broadband (Mobile BB Users)

Two thirds would not be willing to rely solely on a mobile broadband connection*

Q5a. Would your business be willing to rely on your mobile broadband connection as your sole means of broadband access (i.e. give up other forms of access currently used in the business)?



Any Yes 38%

Q5a.

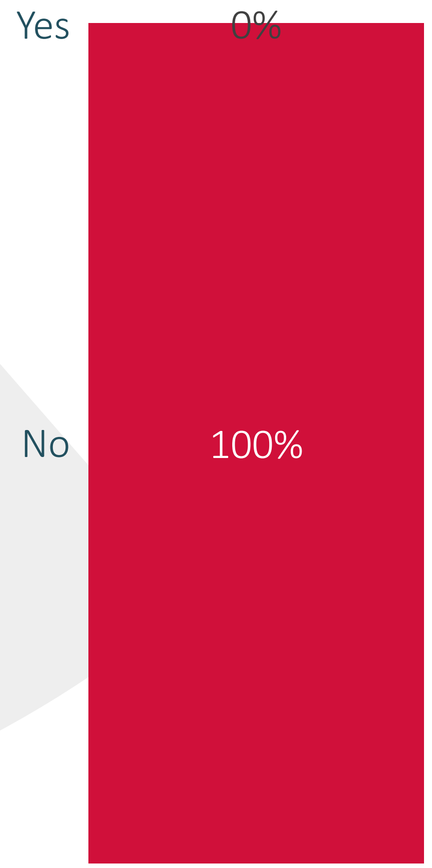
(Base: All With Mobile Broadband and Other Access Modes, n=17)

* Caution: Small Base Size

Willingness to rely solely on Mobile Phone for BB (Mobile Phone Users)

No business users were willing to rely solely on mobile-based broadband connection*

Q5 Would your business be willing to rely on your mobile phone 3G/4G/5G connection as your sole means of broadband access (i.e. give up other forms of access currently used in the business).



Q5

(Base: All Mobile Phone Users, n=13)

* Caution: Small Base Size

Supplier and Usage

Current broadband/Leased Line provider share

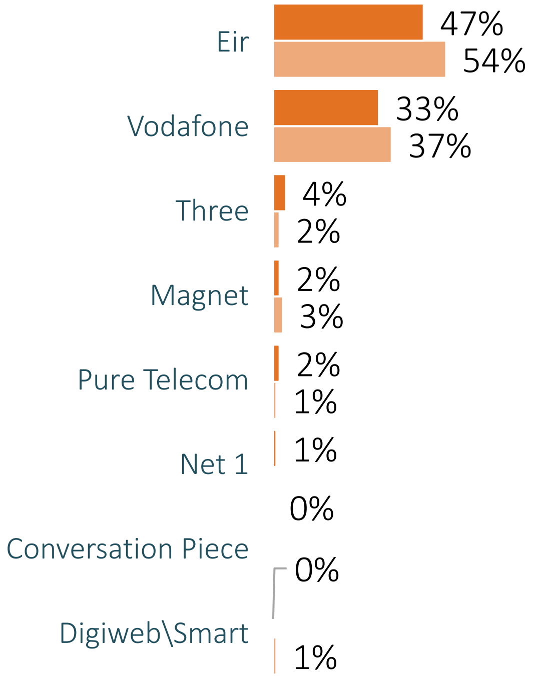
Eir remain the largest business provider, although their share has declined since 2017

2022
2017

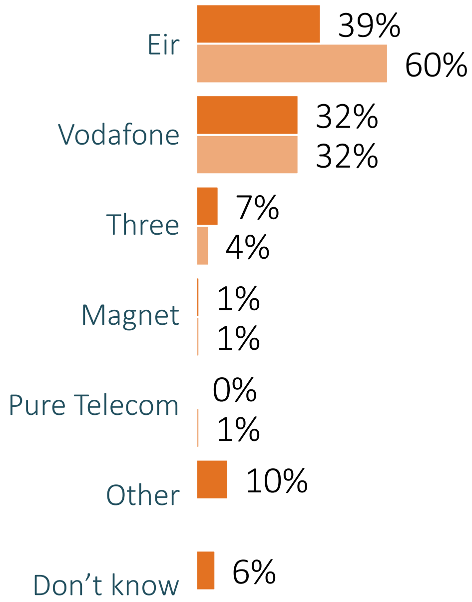
Q7. What company does your business currently use as your service provider (for each access type)?

Mode of Access

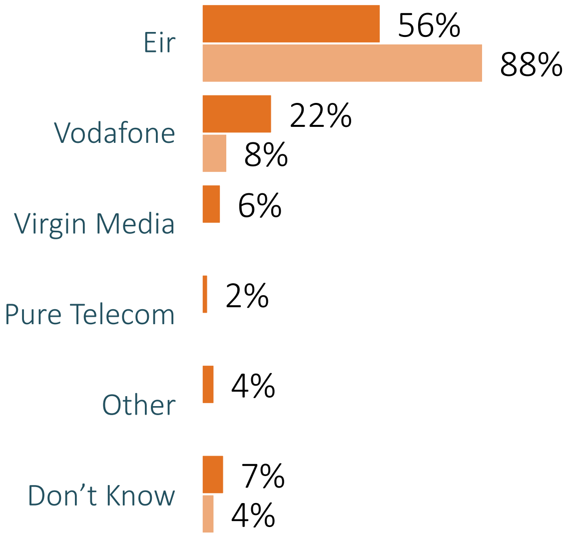
BB via Traditional fixed line telephone (landline)
(n=114)



BB via a Fibre Network
(n=118)



Any Leased Line Access
(n=49)



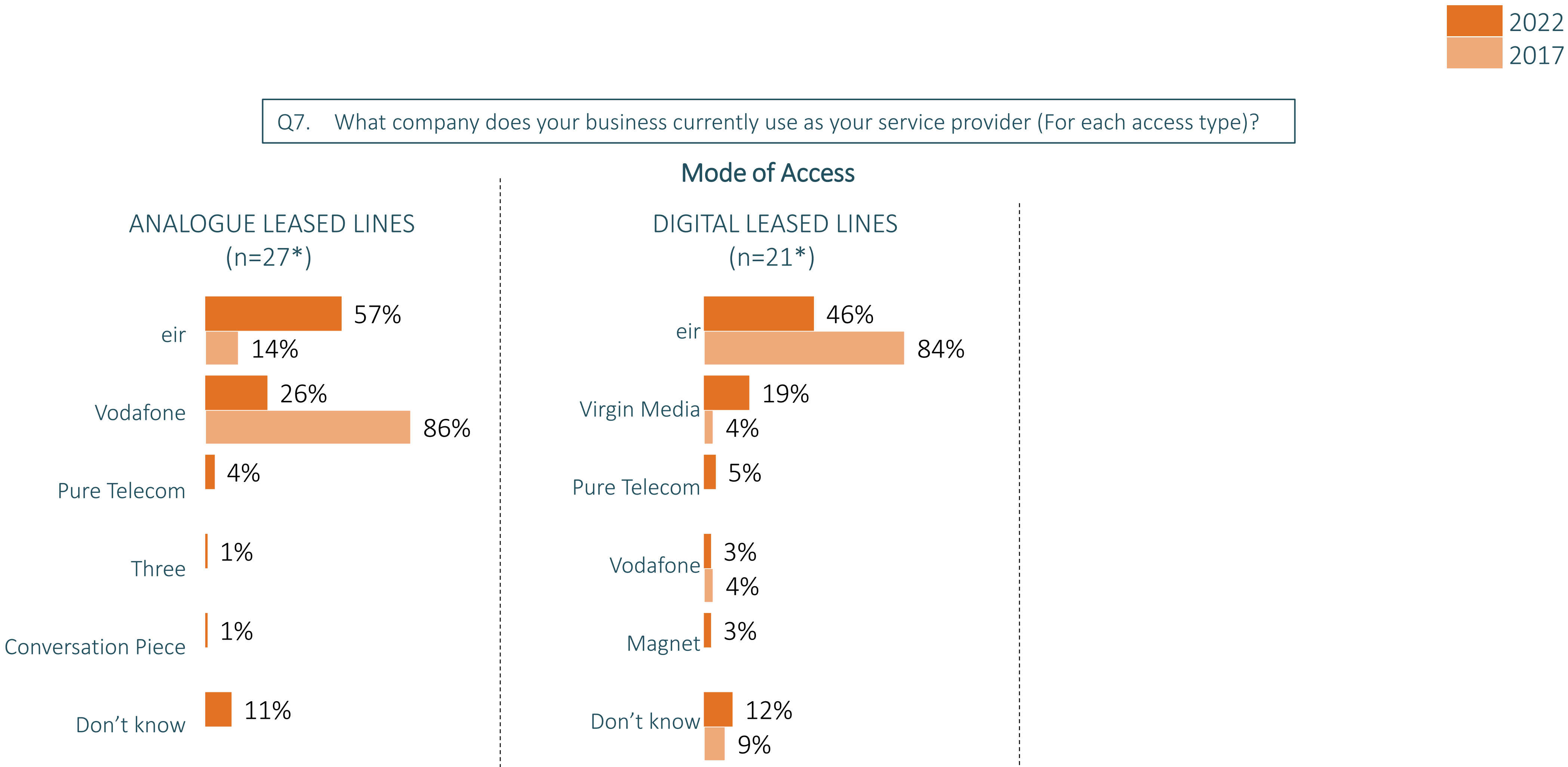
Q7.

(Base: All Broadband/Leased Line users, n = 300)

Current broadband/Leased Line provider share

Eir hold the highest share of leased lines.

Q7. What company does your business currently use as your service provider (For each access type)?



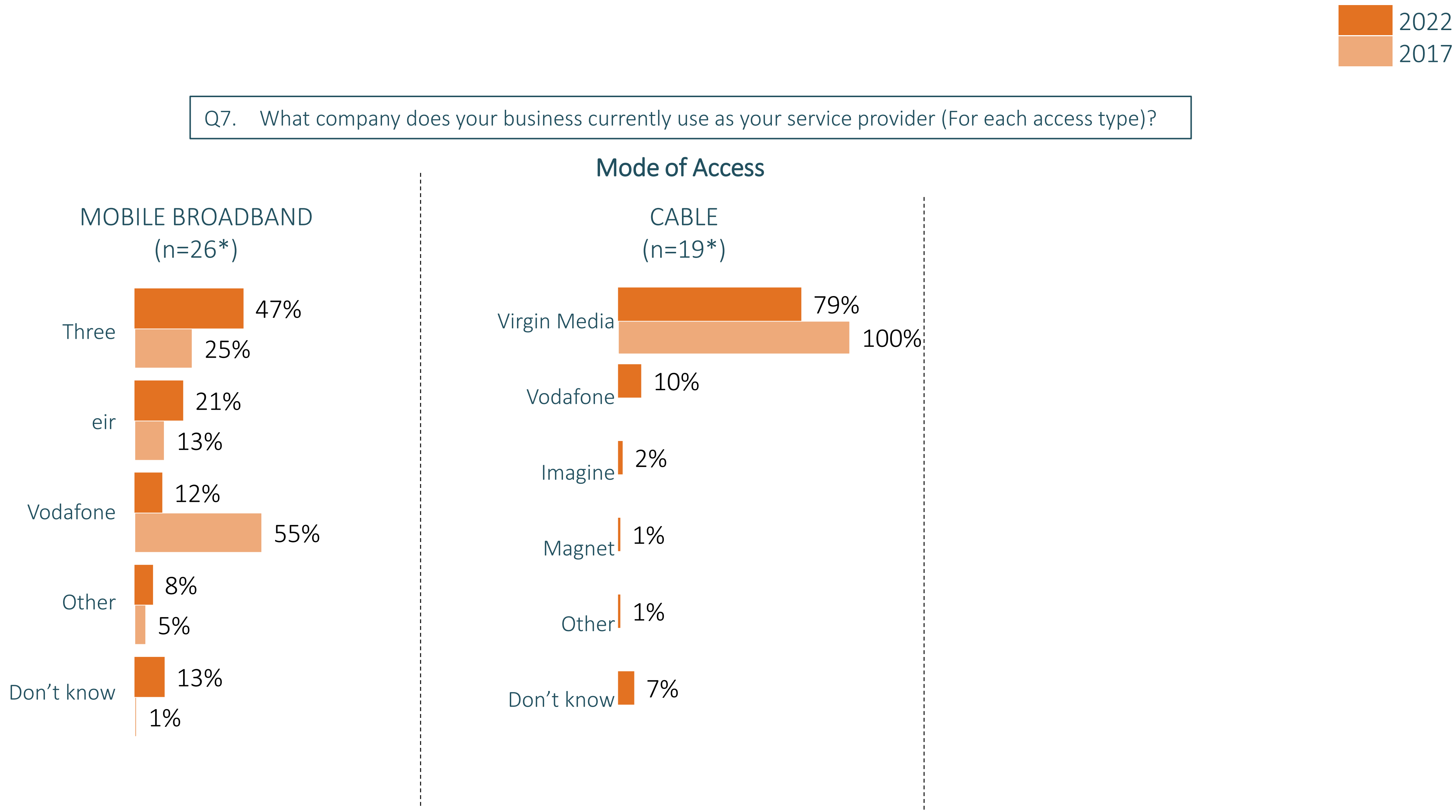
Q7.

(Base: All Broadband/Leased Line users, n = 300)

* Caution: Small Base Size

Current broadband/Leased Line provider share

Q7. What company does your business currently use as your service provider (For each access type)?



Q7.

(Base: All Broadband/Leased Line users, n = 300)

* Caution: Small Base Size

Primary use of broadband/Leased Line service

Employee remote access and VoIP have become more frequently used by businesses since 2017

Q8. What does your business use your broadband for?

	Any Broadband/Leased Line Primary Access (n=300)	2017 (n=300)	BB Fibre (n=114)	BB Fixed Landline (n=102)	BB Cable (n=33*)	BB Leased Line (n=13*)	Mobile BB (n=11*)	Satellite Broadband (n=11*)	Fixed Wireless (n=10*)
Email and internet	97%	(98%)	97%	98%	100%	88%	100%	68%	100%
Data services such as cloud computing and other software services	40%	(29%)	54%	27%	51%	24%	38%	27%	26%
Employee remote access to the business network	26%	(16%)	29%	16%	44%	25%	33%	34%	34%
Voice – VoIP / Voice over broadband	20%	(11%)	23%	16%	28%	37%	0	32%	23%
Connectivity between business premises	18%	(20%)	17%	18%	32%	28%	0	14%	10%
Disaster recovery services	14%	(16%)	17%	12%	14%	23%	0	18%	5%
Card Machines	5%	(-)	2%	11%	0	0	0	0	0
Security/CCTV	1%	(-)	3%	1%	2%	7%	0	0	18%
Tills	1%	(-)	*	0	0	3%	7%	0	9%
Other	3%	(3%)	0	1%	0	5%	0	0	0

Q8.

(Base: All respondents who use broadband as primary data connectivity services, n= 300)

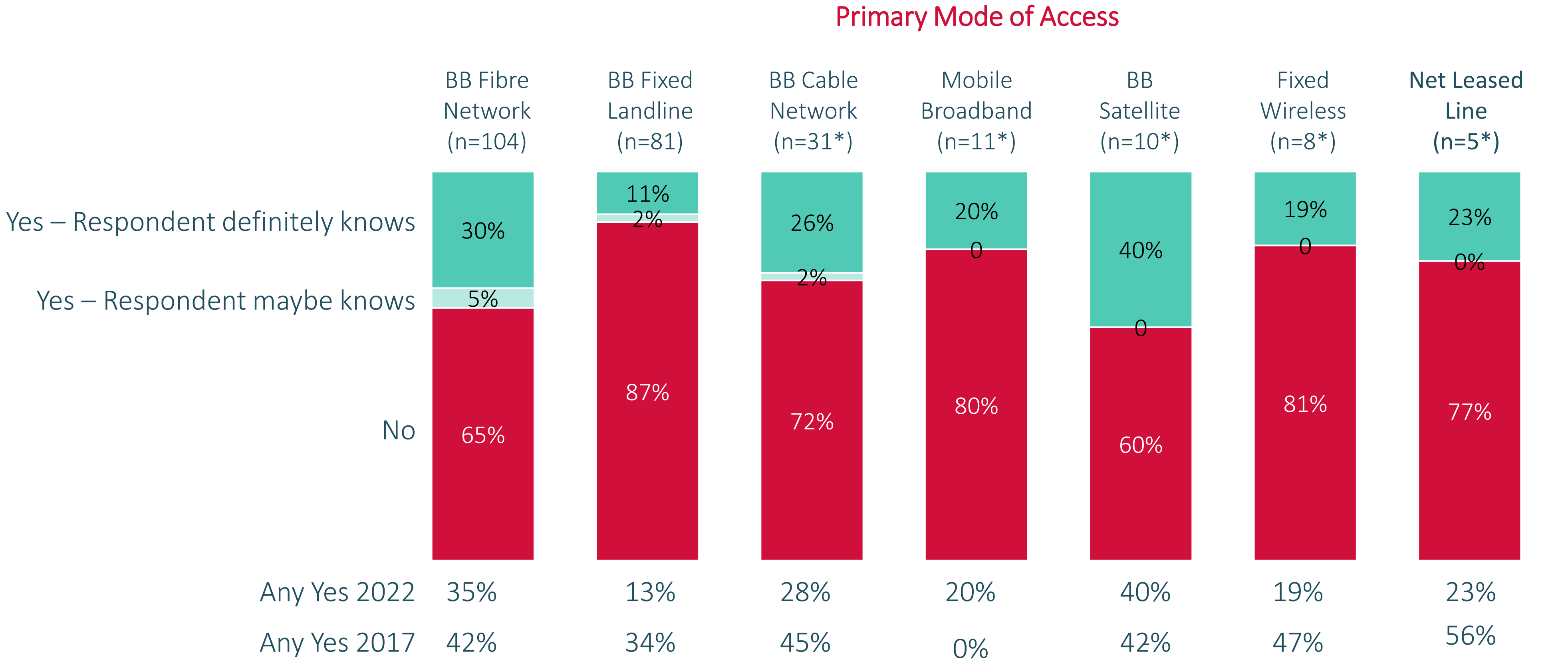
* Caution: Small Base Size

Speed of Connections

Knowledge of Claimed Maximum Download Speed

Those with fibre-based broadband are more likely than those with a traditional broadband connection over a fixed phone line to know what their maximum download speed is.

Q39. Do you know the maximum claimed download speed for your organisation's main broadband service?



Q39.
(Base: All respondents who use broadband as primary data connectivity services,)

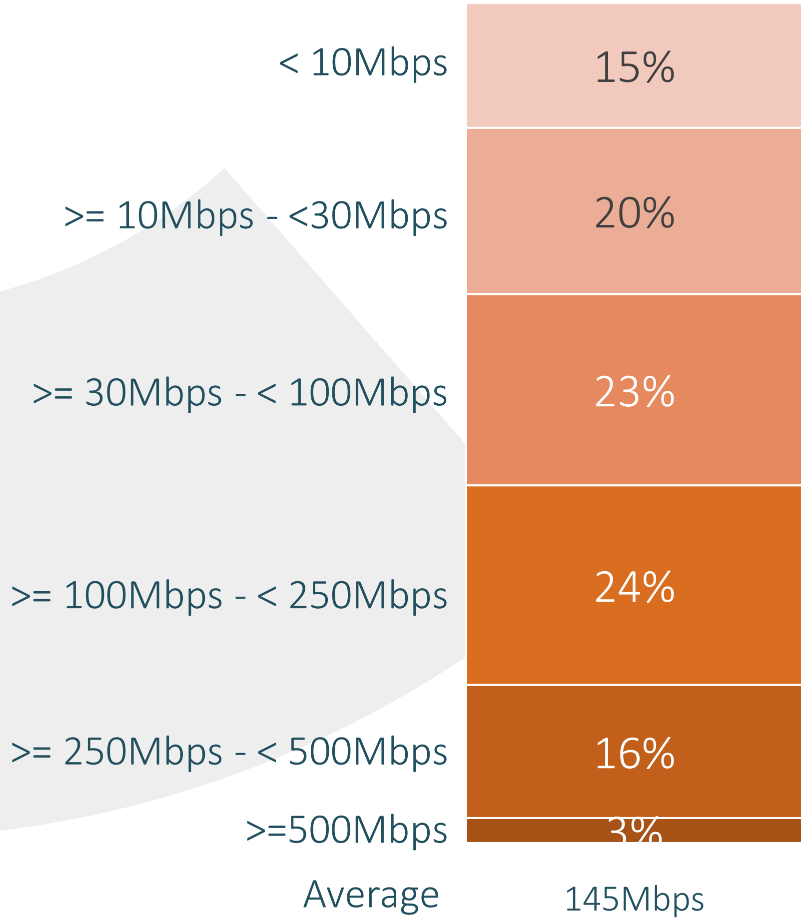
* Caution: Small Base Size

58% fall within the <100Mbps speed band(s)

The average actual speed of main broadband service is 145 Mbps.

Actual download speed of main broadband service

Q42. What is the actual download speed for your main broadband service (up to how many megabits per second), based on your usage patterns, or on online speed tests (e.g. ookla)?



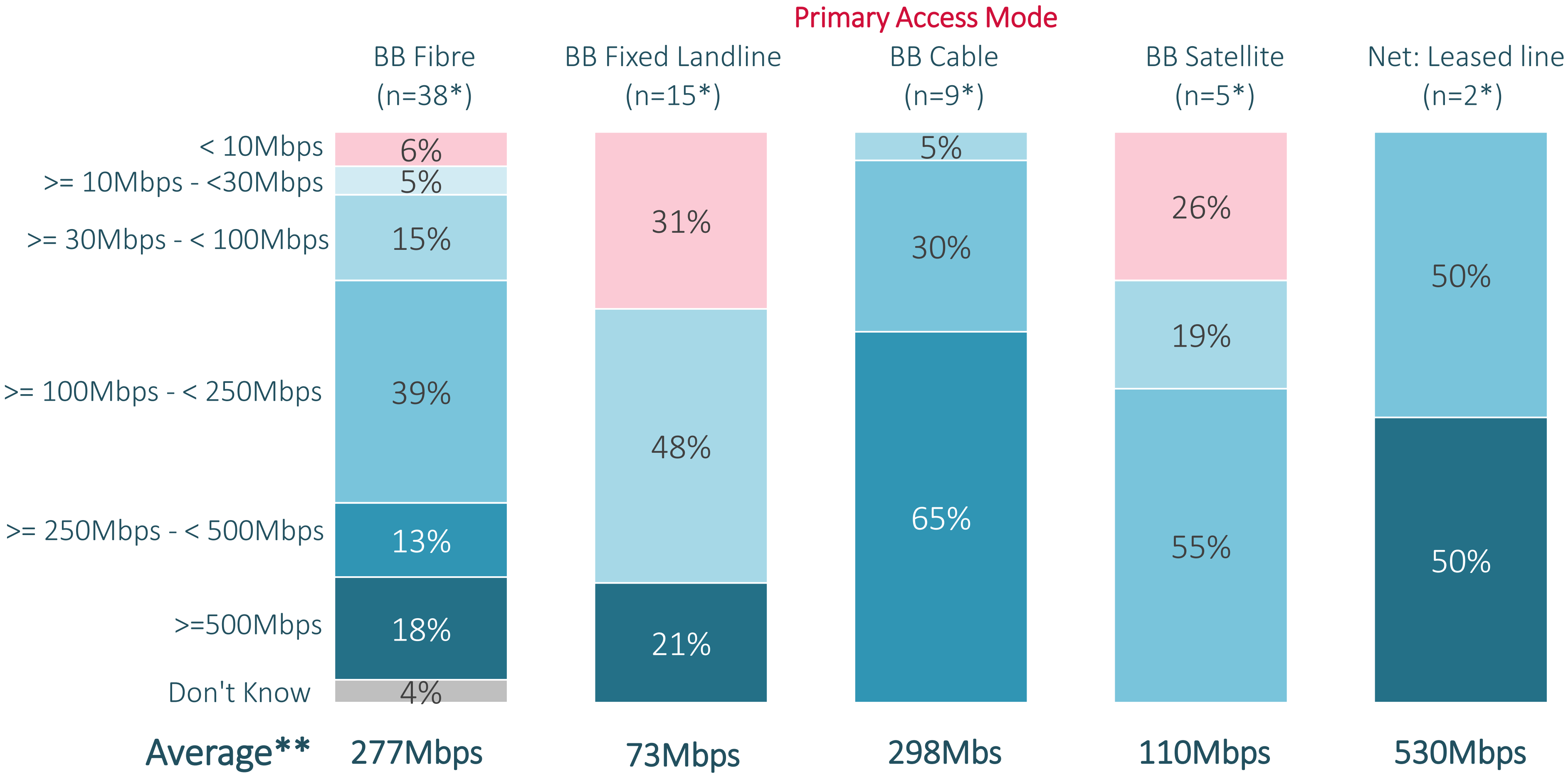
Q42.

(Base: All who know broadband speed, n=86)

Maximum Claimed Download Speed

Fibre customers are more likely, on average to have a download speed in excess of 100Mbps

Q40. What is the maximum claimed download speed for your main broadband service – up to how many megabits per second?



Q40.

(Base: Total Broadband/Leased Line users Who Know Download Speed, n=76)

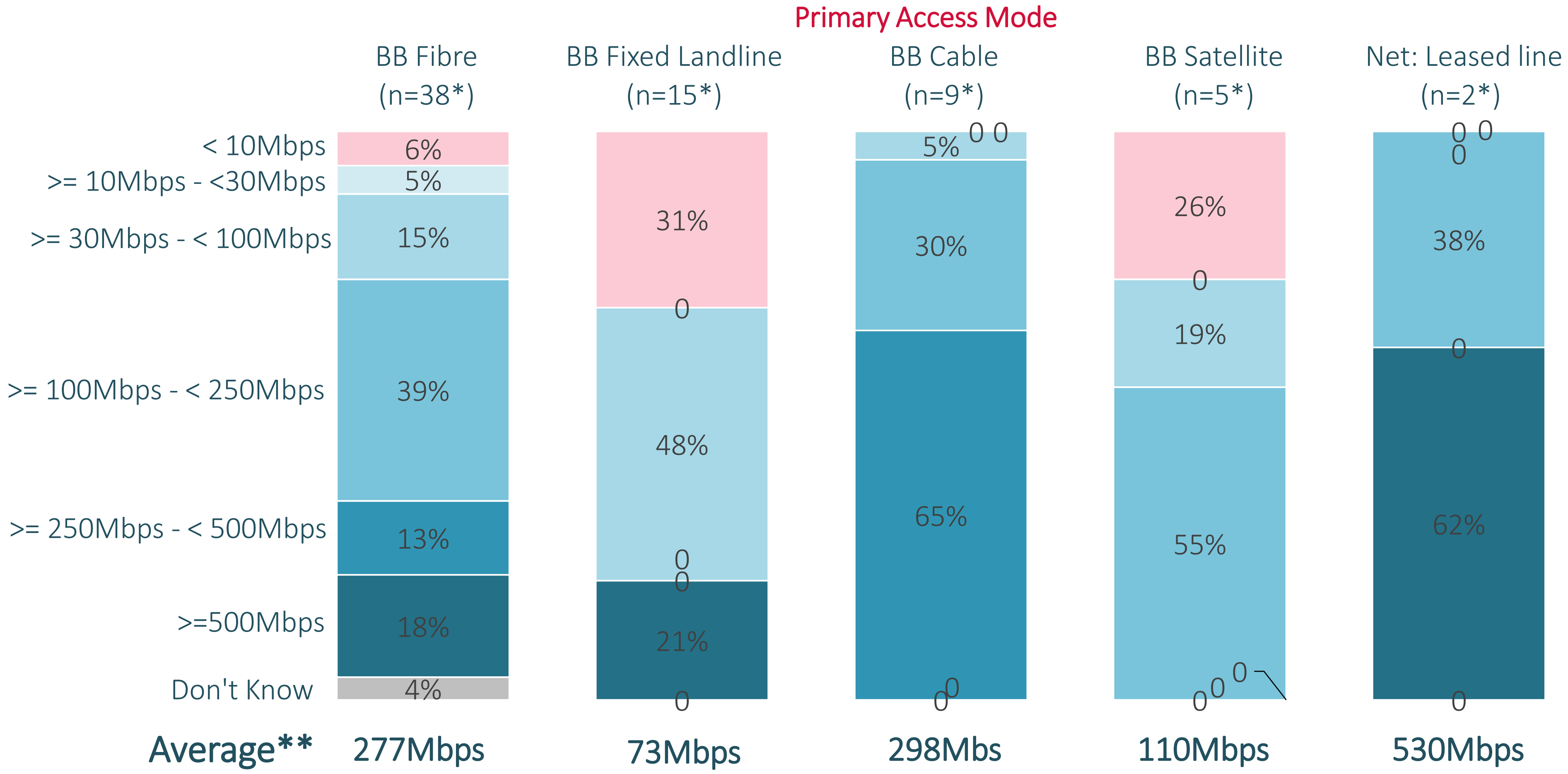
* Caution: Small Base Size

** Note: Midpoint average

Maximum Claimed Download Speed

Fibre customers are more likely, on average to have a download speed in excess of 100Mbps

Q40. What is the maximum claimed download speed for your main broadband service – up to how many megabits per second?



Q40.

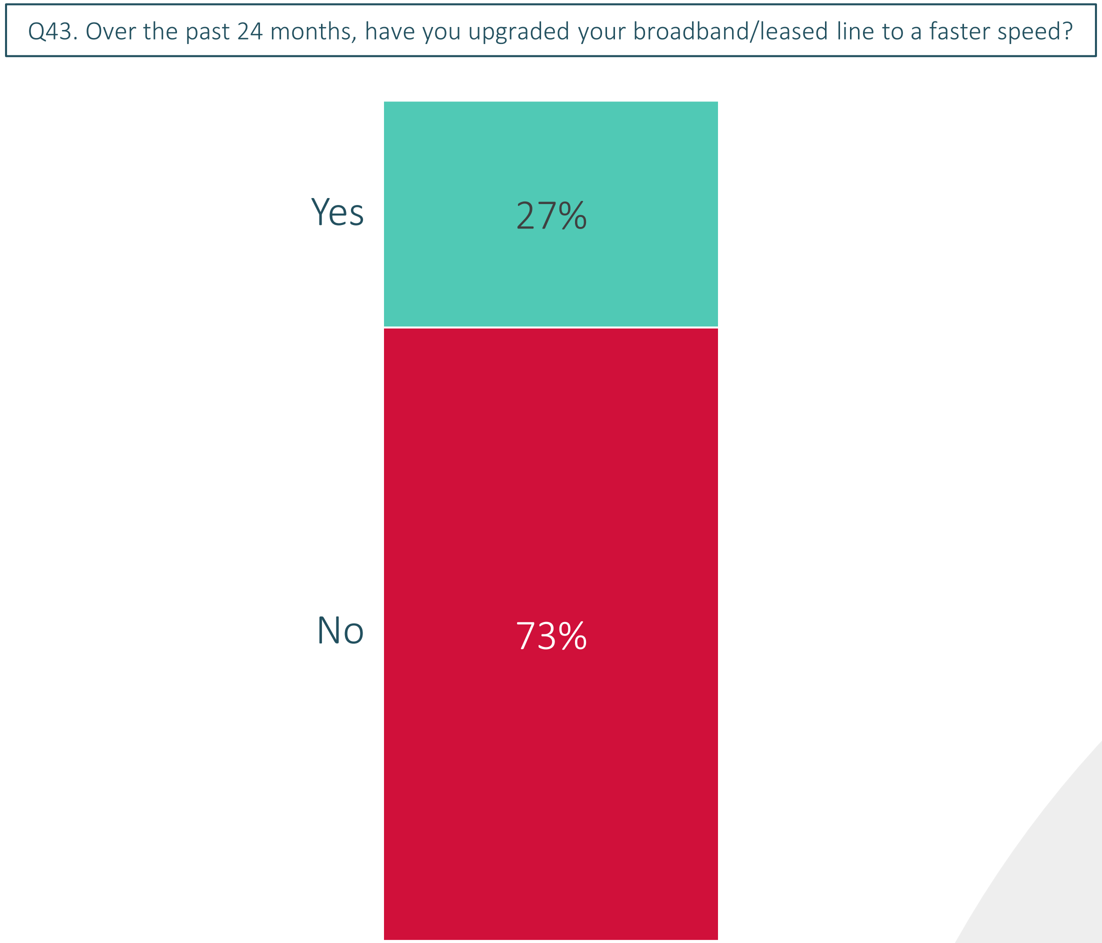
(Base: Total Broadband/Leased Line users Who Know Download Speed, n=76)

* Caution: Small Base Size

** Note: Midpoint average

Incidence of upgrading line to a faster line

1 in 4 have upgraded their broadband connection within the past 2 years



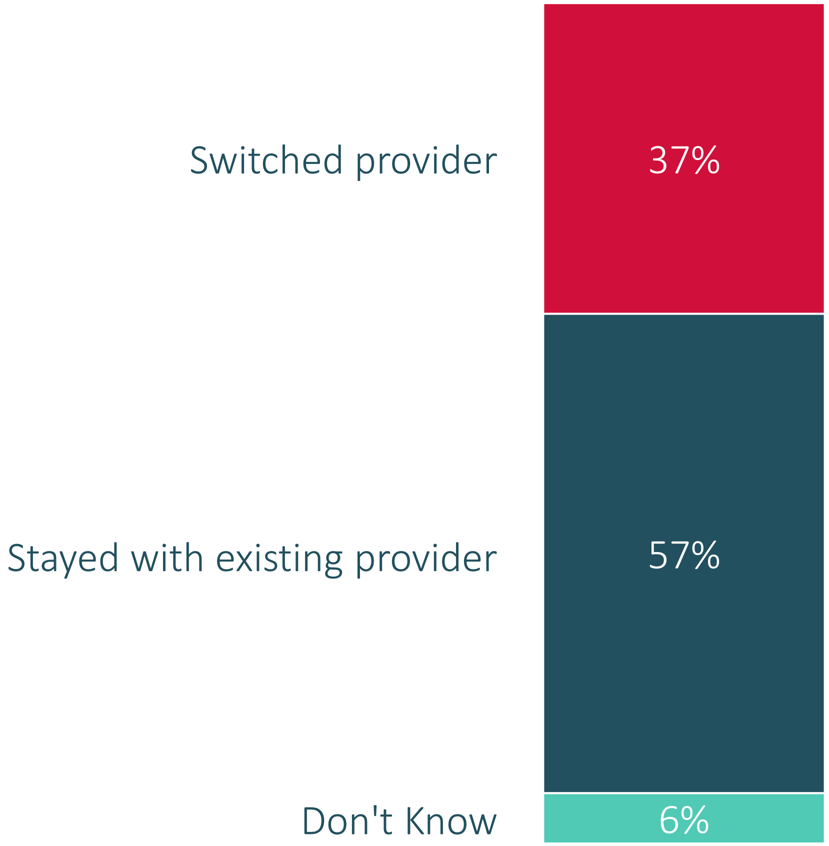
Q43.

(Base: All with broadband access,)

Incidence of switching provider when upgrading

37% of those who upgraded switched provider at the same time

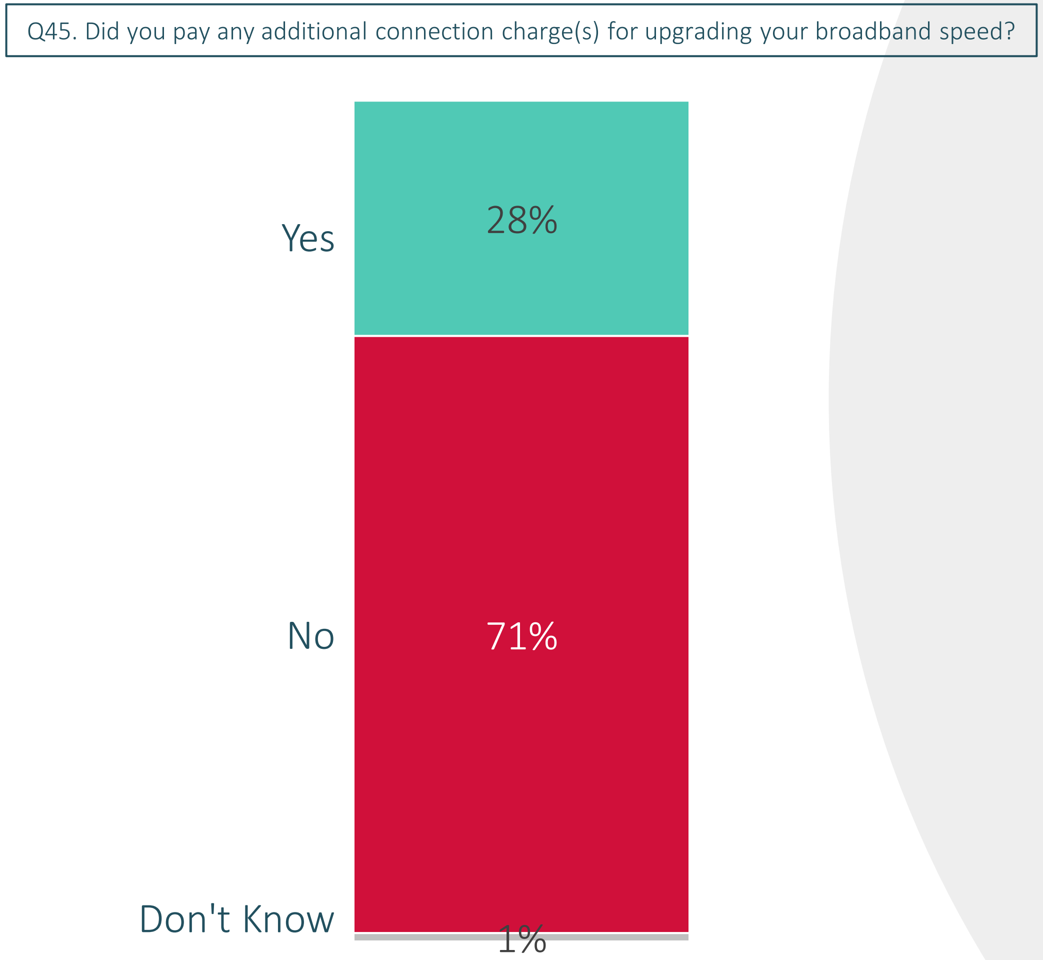
Q44. When upgrading your speed, did you switch provider, or retain your existing provider?



Q44.

(Base: All Upgrading Broadband To Faster Speed, n=68)

Incidence of paying additional connection charge for upgrade

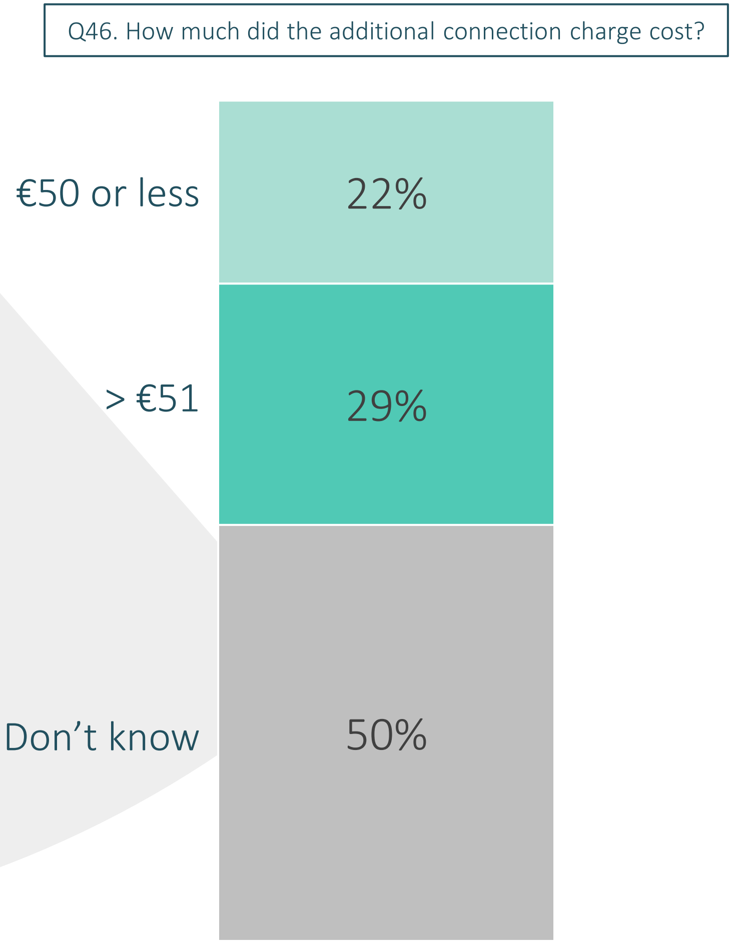


Q45.

(Base: All who switched provider when upgrading broadband speed, n=30)

Cost of additional connection charge

50% of those paying more were unsure of the additional amount the business paid*



Q.46

(Base: All Paying Additional Connection Charge, n=10)

* Caution: Small Base Size

Bundles

Incidence of Bundling Broadband/Leased Line

72% receive a single bill that includes at least one other service

Q9. Which of the following best describes how your business is billed for your broadband?

	Any Broadband/Leased Line 2022 (n=300)	Any Broadband/ Leased Line 2017 (n=300)	Primary Mode of Access: BB Fibre (n=114)	BB Fixed Landline (n=102)	Net: leased line (n=13*)	BB Cable (n=33*)	Mobile BB (n=11*)	BB Satellite (n=11*)	Fixed wireless provided via aerial/ antennae (n=10*)	Digital Leased Lines (n=7*)	Analogue Leased Lines (n=5*)
I receive a single bill for my broadband service that includes at least one of the other services I have	72%	(63%)	69%	83%	77%	70%	19%	40%	48%	80%	63%
I receive a separate bill for my broadband service but I use the same provider for at least one of the other services	13%	(10%)	19%	5%	5%	14%	42%	10%	18%	6%	0%
I receive a separate bill for my broadband service as I receive all other services from different providers	12%	(21%)	11%	7%	19%	12%	38%	50%	33%	14%	37%
Don't know	3%	(2%)	2%	4%	0%	5%	1%	0%	0%	0%	0%

Q9.

(Base: Total Broadband/Leased Line users, n = 300)

*Caution Small Base Size

Service included within bundle

7 in 10 bundle customers have a package consisting of broadband and fixed phone

Q1.0 Including your broadband services which of the following services are also included on your single bill?

	Total 2022 (n=212)	Total 2017 (n=182)	Primary Mode of Access: BB Fixed Landline (n=80)	Primary Mode of Access: BB Fibre Network (n=80)
Broadband & Fixed phone	71%	(69%)	78%	68%
Broadband & Fixed phone & Mobile phone	15%	(15%)	18%	17%
Broadband only	10%	(-)	2%	10%
Mobile phone	1%	(7%)	*	2%
Other	1%	(7%)	0	0
Don't know	3%	(1%)	2%	3%

Q.10

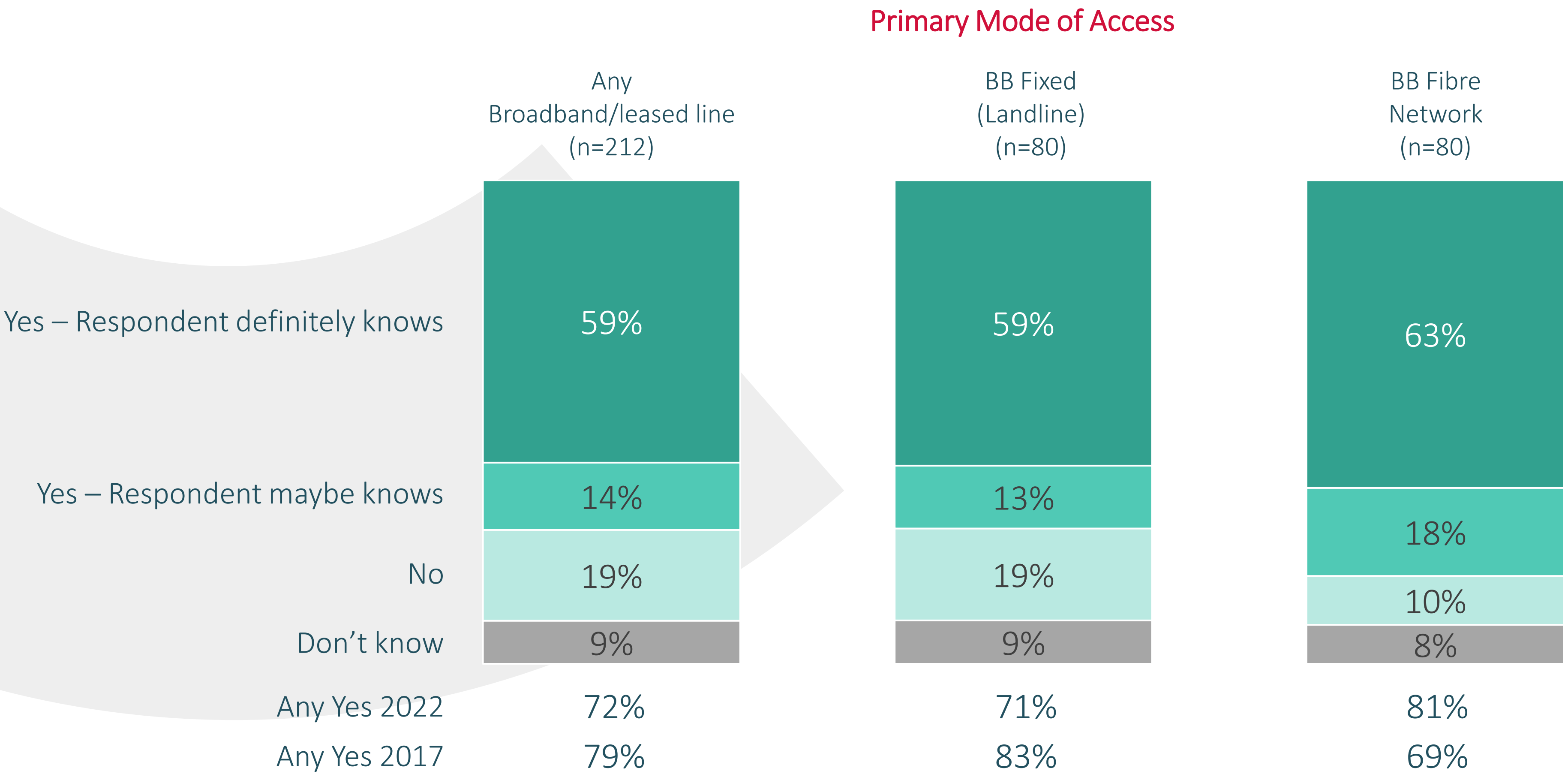
(Base: Total Broadband/Leased Line Users Who Use Service In A Bundle, n = 212)

Other Bundle types base too small to show

Awareness of Cost – Bundle Users

Fibre network customers are the most likely to be aware of the cost of the combined services

Q11. Do you know how much your business pays for your combined service(s) on a monthly basis?



Q11.

(Base: Total Broadband/Leased Line Users Who Use Service In A Bundle Which They Know What Is Included, n = 212)

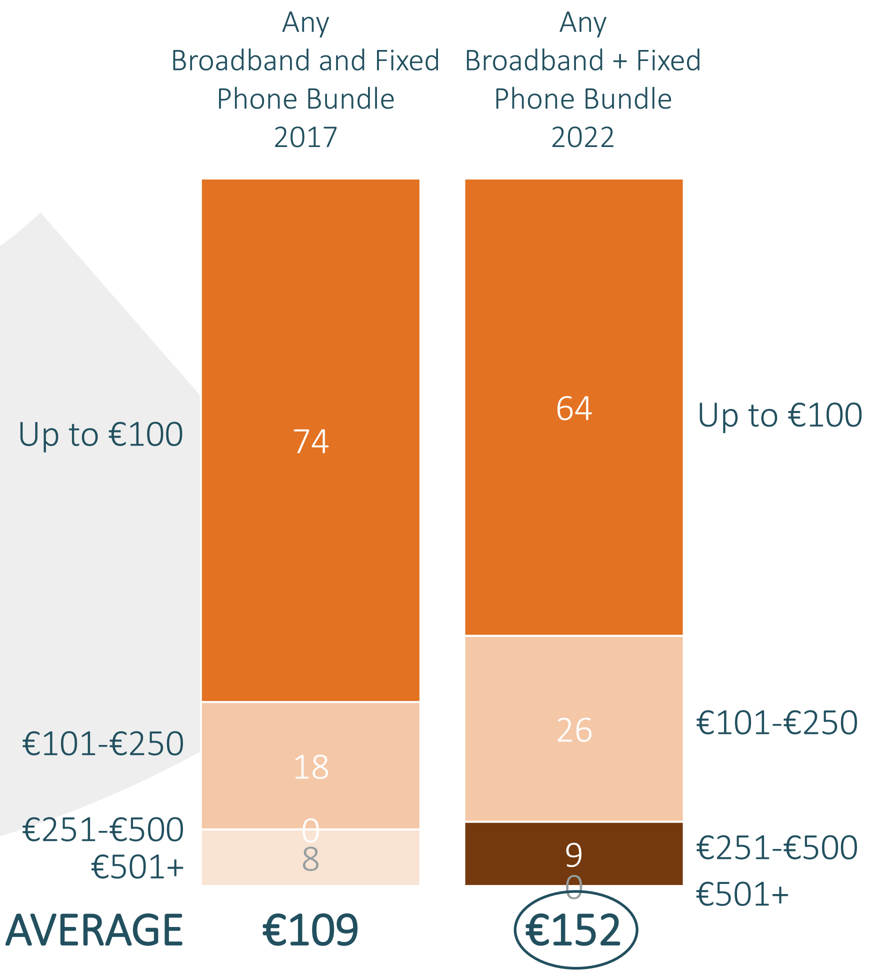
Other Bundle types base too small to show

Typical Spend Per Month - Bundle Users

The average monthly bill among those who are aware of the cost of their service is €152

2017 | 2022

Q.12 How much does your business typically pay for this combined package of services per month (excluding any promotional/introductory offers)?



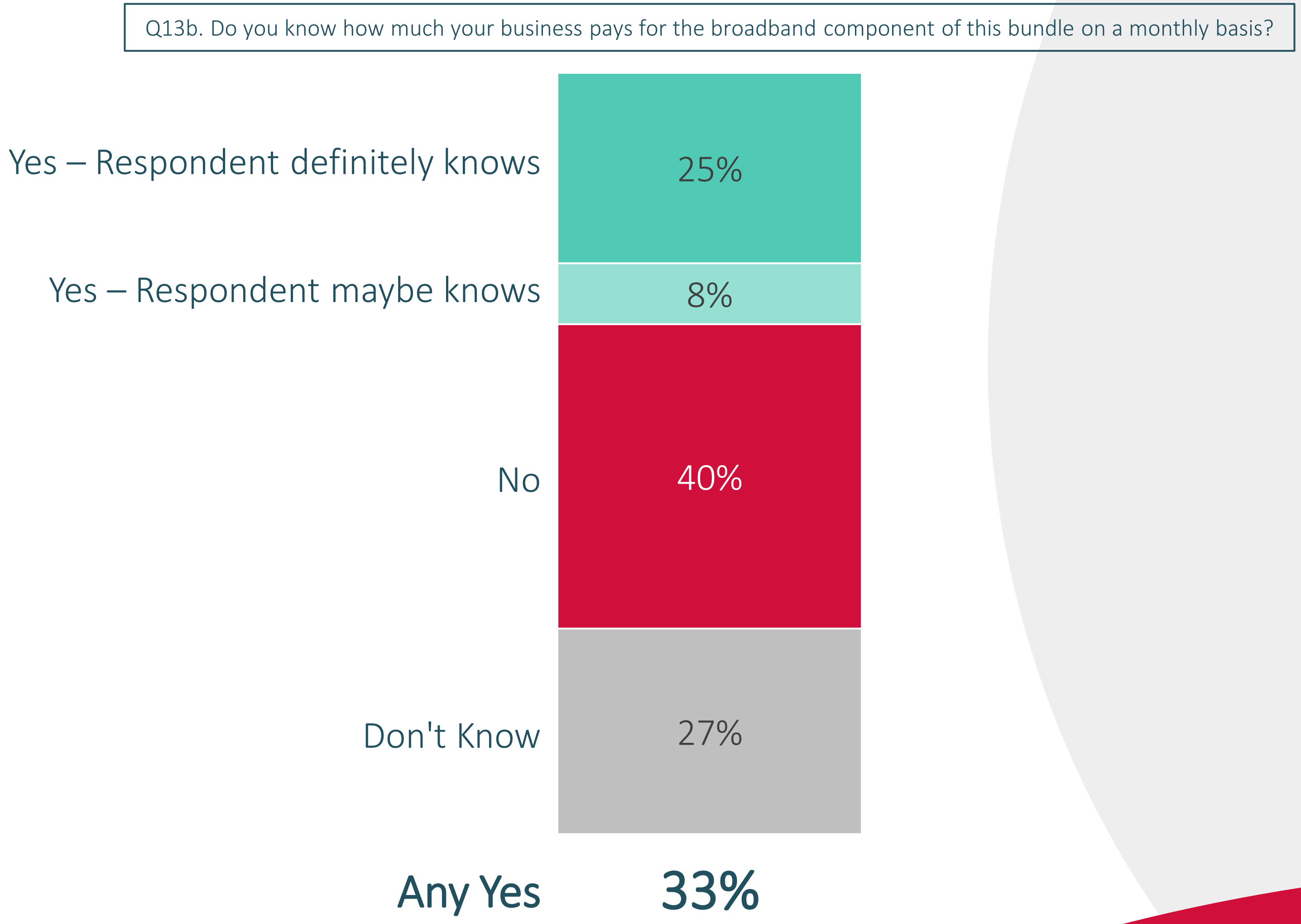
Q.12

(Base: Total Broadband/Leased Line Users Who Are Aware of Bundle Cost, n = 141)

NOTE: Other Bundle types base too small to show

Awareness of cost of the broadband component of a bundle

33% have an awareness of the broadband component of the bundle



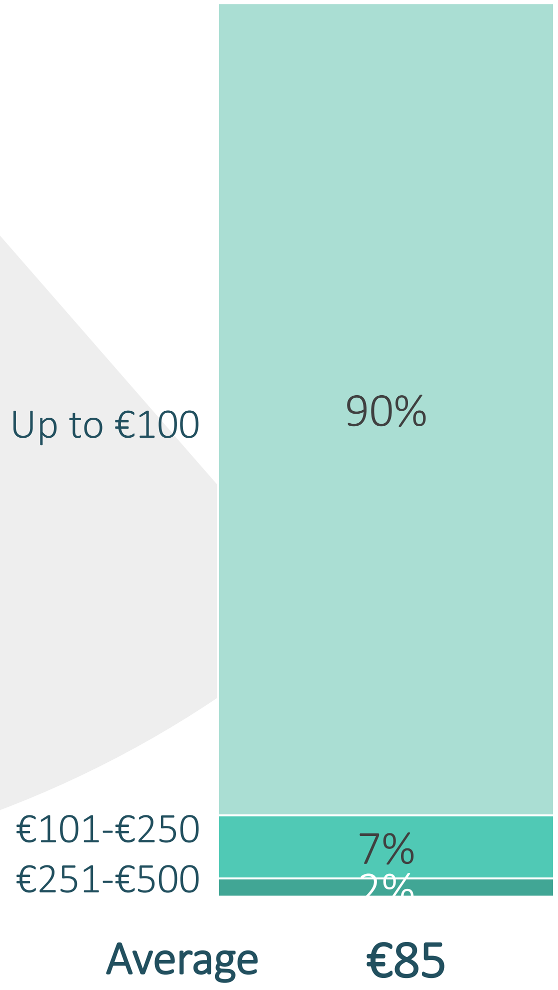
Q13b.

(Base: All With Single Bill For Broadband Plus At Least One Other Service, n=212)

How much are bundled customers paying for the broadband component of bundle?

90% pay less than €100 per month

Q13c. Excluding any promotional/introductory offers, how much does your business typically pay for the broadband component of this bundle each month?



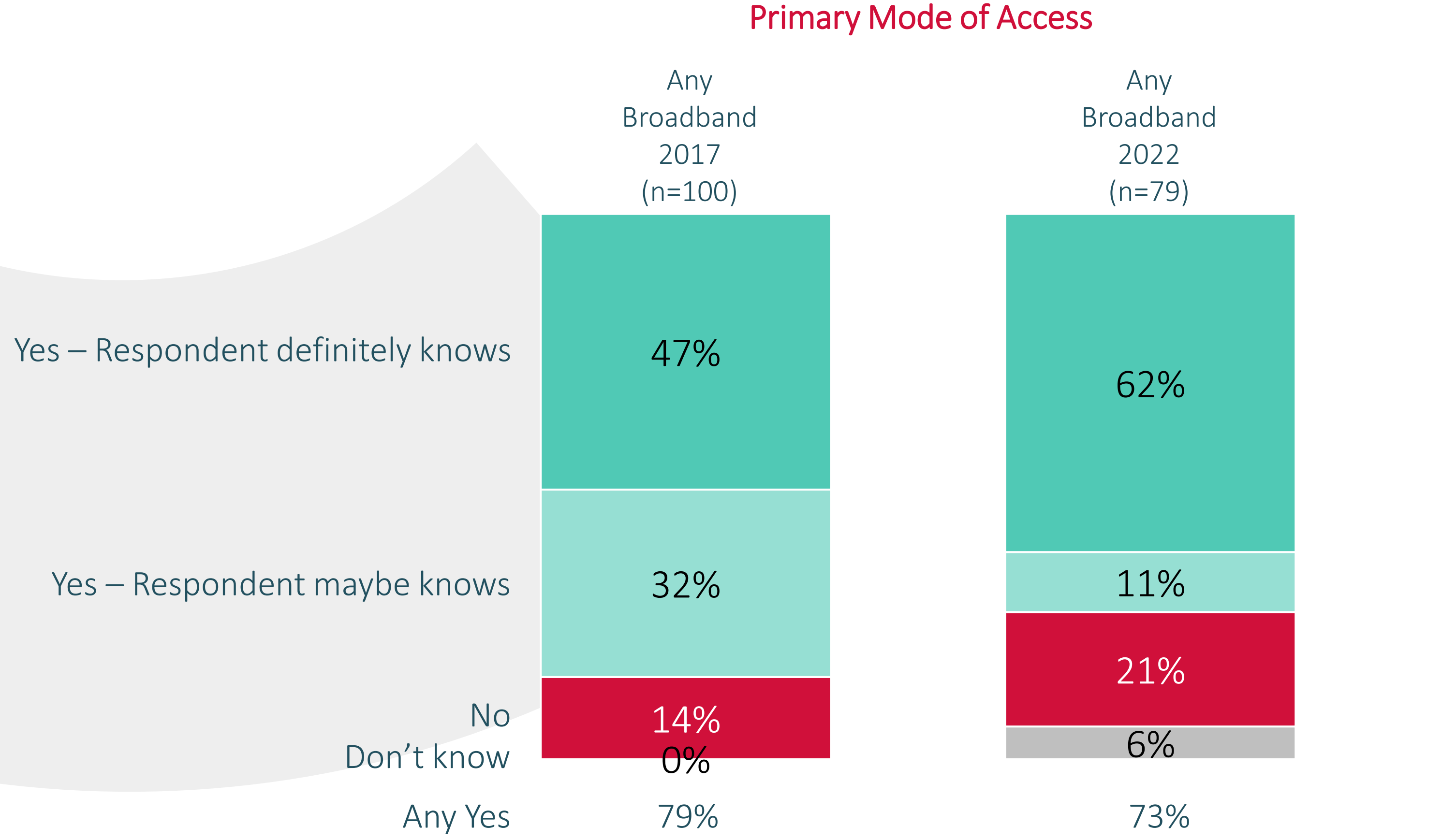
Q13c.

(Base: All Knowing Monthly Cost Of Broadband Component, n=74)

Awareness of Cost of Services – Non-Bundle Users

Three quarters of non-bundled users know the cost per month

Q14. Do you know how much your business pays for your broadband service on a monthly basis?



Q14

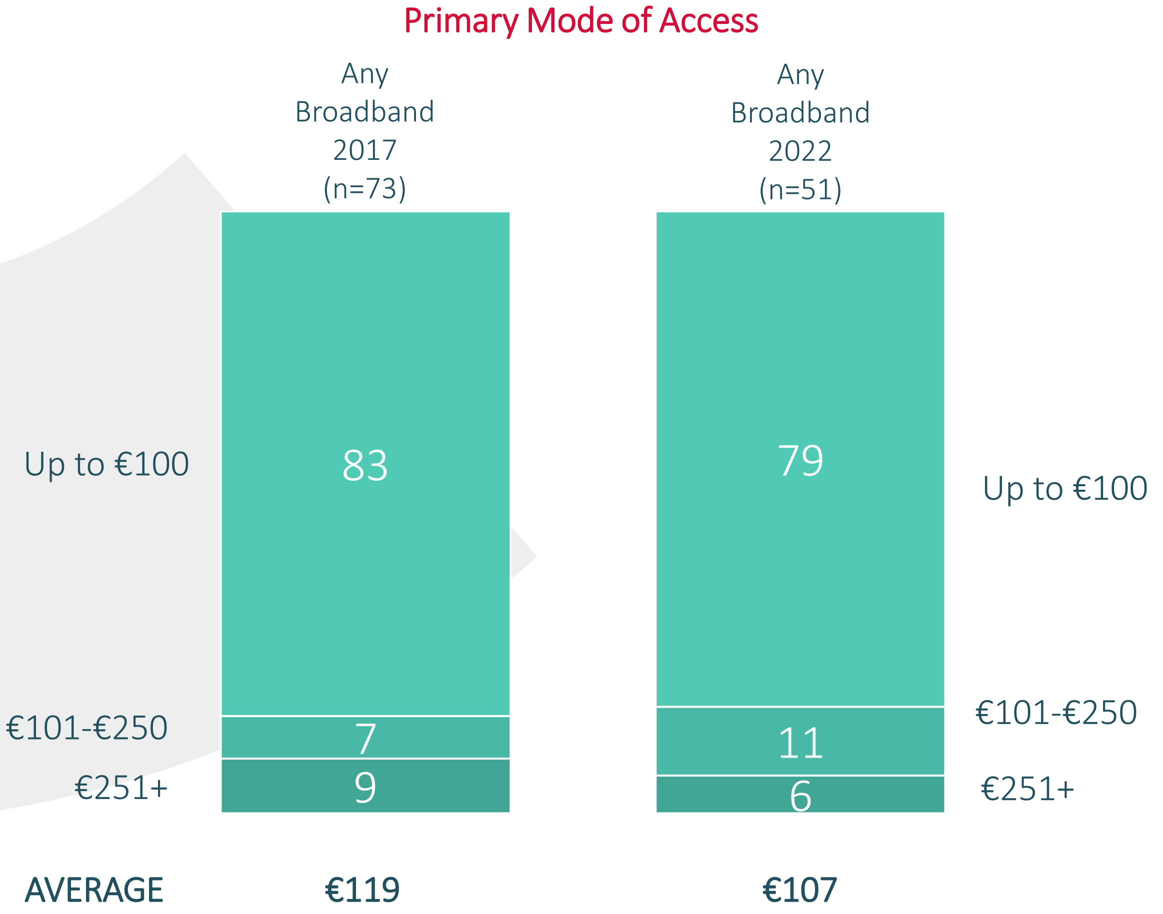
(Base: Total Broadband/Leased Line users Who Use Service Not In A Bundle n = 79)

Other Access types too small to show

Typical Broadband Spend Per Month – Non-Bundle Users

The average cost for business customers of standalone broadband is €107 per month

Q15. How much does your business typically pay for its broadband service per month (excluding any promotional/introductory offers)?



Q15.

(Base: Total Broadband/Leased Line users who use service not in a bundle and know cost, n=51)

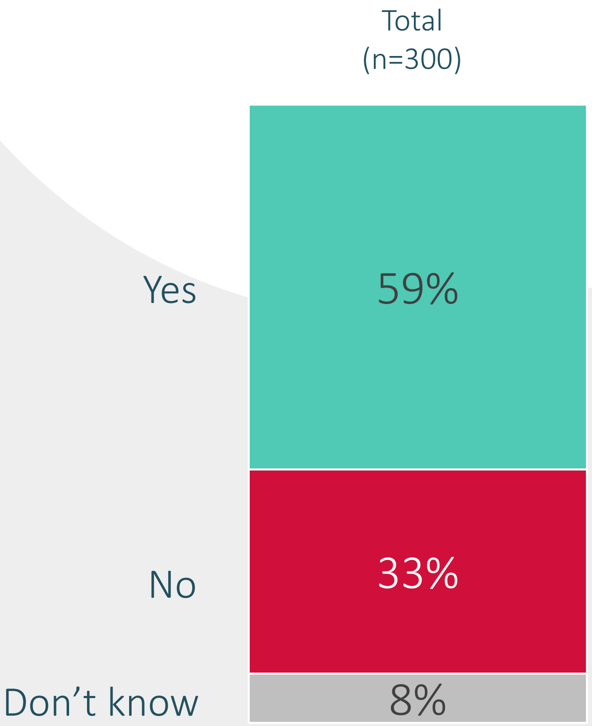
Note: Other Access types too small to show

Contracts, Loyalty and Switching

Is primary service subject to a contract?

59% are tied into a contract with service providers – significantly lower than in 2017 (73%)

Q16. Thinking about your primary broadband/leased line service, are you currently tied into a contract with your service provider?



	Total
Yes 2022	59%
Yes 2017	73%

Primary Mode of Access

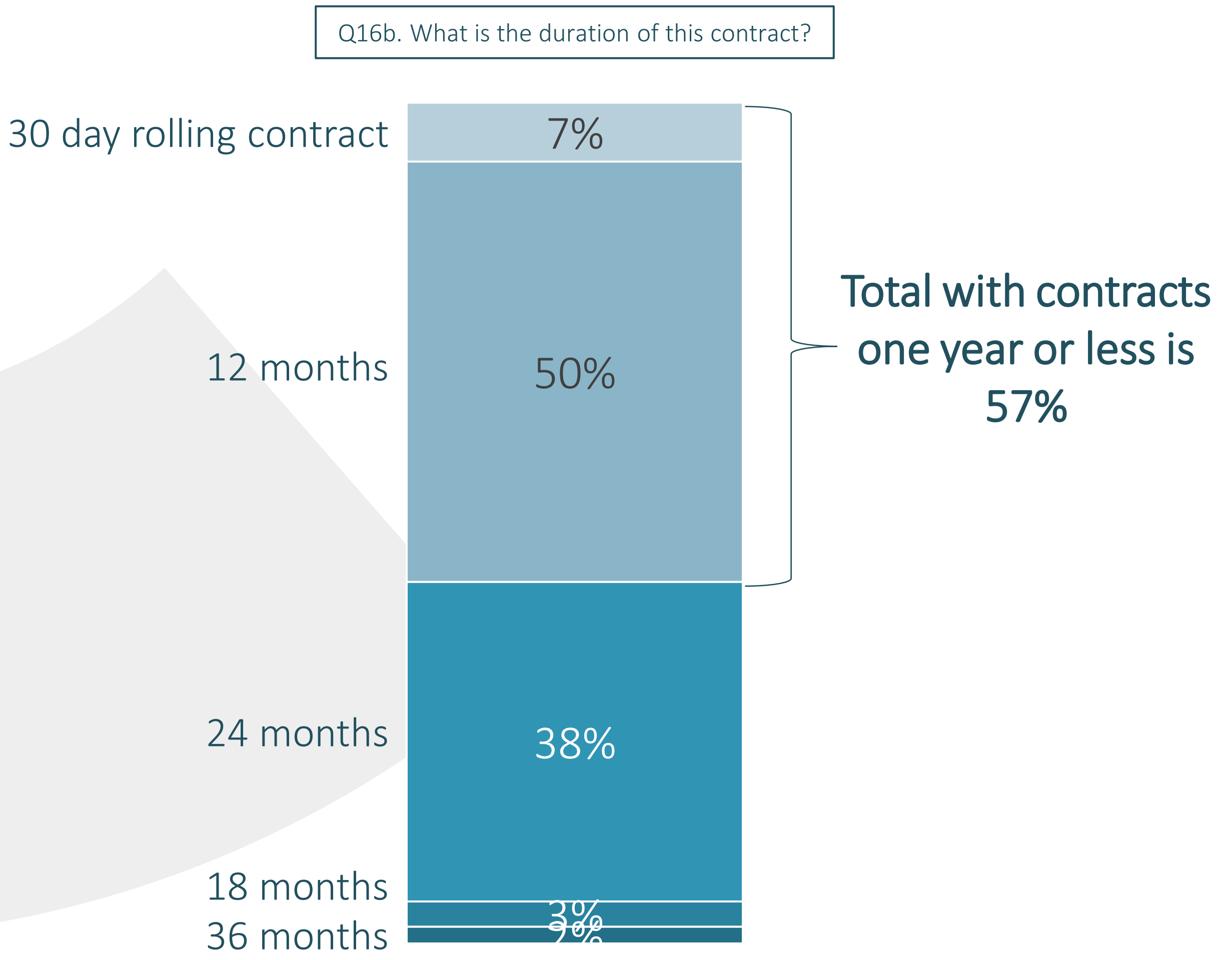
	BB Fibre Network (n=114)	BB Fixed Landline (n=102)	BB Cable Network (n=33*)	Any Leased Line (n=13)	Mobile Broadband (n=11*)	BB Satellite (n=11*)	Fixed Wireless (n=10*)	Analogue Leased Line (n=5*)	Digital Leased Line (n=7*)
Yes	65%	53%	65%	82%	74%	69%	26%	67%	86%
No	31%	33%	33%	18%	25%	26%	66%	33%	14%
Don't know	4%	14%	2%	0%	1%	6%	9%	0%	0%
Yes 2022	65%	53%	65%	82%	74%	69%	26%	67%	86%
Yes 2017	78%	72%	88%	90%	-	-	-	44%	66%

Q16.
(Base: Total Broadband/leased Line Users, n = 300)

* Caution: Small Base Size

Contract Duration

57% of businesses have contracts in duration for one year or less



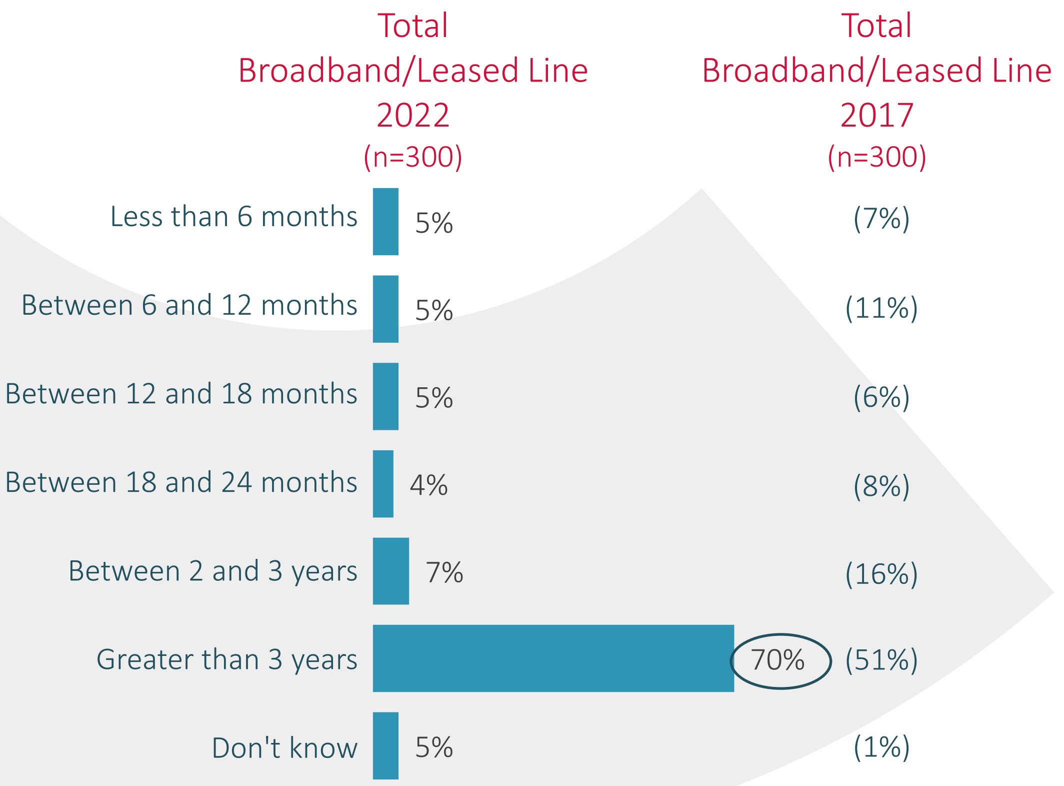
Q16b.

(Base: All currently in contract, n=187)

Length of time with current provider

7 in 10 business customers have been with their current providers for > 3 years, which has increased since 2017

Q17. How long has your business been with your current main broadband service provider for?



Primary Mode of Access									
	BB Fibre (n=114)	BB Fixed Landline (n=102)	BB Cable (n=33*)	Net: leased line (n=13*)	Mobile BB (n=11*)	BB Satellite (n=11*)	Fixed wireless provided via aerial/ antennae (n=10*)	Digital Leased Line (n=7*)	Analogue Leased Lines (n=5*)
Less than 6 months	7%	5%	*	5%	24%	0	0	7%	0
Between 6 and 12 months	6%	7%	0	0	0	6%	0	0	0
Between 12 and 18 months	7%	4%	1%	4%	9%	5%	0	0	16%
Between 18 and 24 months	2%	4%	1%	0	0	0	35%	0	0
Between 2 and 3 years	10%	3%	14%	8%	7%	0	0	11%	0
Greater than 3 years	65%	73%	74%	83%	57%	88%	65%	82%	83%
Don't know	4%	5%	10%	0	3%	0	0	0	0

Q17.
(Base: Total Broadband/Leased Line users, n=300)

*Caution Small Base Size

Incidence of Switching

Only 17% of SMEs have switched provider during the past 3 years – down significantly from 2017

Q35. Has your organisation ever switched broadband or leased line service provider?

	Total Broadband/Leased Line 2022 (n=300)	Total Broadband/ Leased Line 2017 (n=300)	Primary Mode of Access								
			BB Fibre (n=114)	BB Fixed Landline (n=102)	BB Cable (n=33*)	Net: leased line (n=13*)	Mobile BB (n=11*)	BB Satellite (n=11*)	Fixed wireless provided via aerial/ antennae (n=10*)	Digital Leased Line (n=7*)	Analogue Leased Lines (n=5*)
Yes – In the last month	1%	(1%)	1%	2%	1%	0	0	0	0	0	0
Yes – Between 1 month and 3 months ago	1%	(1%)	1%	2%	1%	0	0	0	0	0	0
Yes – Between 3 months and 6 months ago	3%	(5%)	3%	4%	*	*	24%	0	0	0	0
Yes – Between 6 months and 12 months ago	3%	(7%)	3%	4%	5%	0	0	0	0	0	0
Yes - Between 1 Year and 3 Years ago	9%	(22%)	10%	12%	7%	7%	9%	32%	18%	0	16%
Yes - More than 3 years ago	46%	(23%)	47%	42%	47%	58%	32%	34%	56%	76%	14%
Never switched	36%	(42%)	35%	34%	38%	34%	35%	34%	26%	24%	69%

Q35.

(Base: Total Broadband/Leased Line Users, N= 300)

* Caution: Small Base Size

Switchers - previous means of access

Fixed broadband via traditional line was the main means of access before switching

Q.37 Thinking about your previous broadband or leased line service provider which means of accessing the internet did you previously use?

Previous Access	Current Primary Mode of Access of Broadband					
	TRADITIONAL FIXED LINE (64)	CABLE TV (21*)	FIBRE NETWORK (71)	MOBILE BROADBAND (6*)	SATELLITE NETWORK (5*)	NET: LEASED LINE (6*)
Broadband over a traditional fixed line	88%	78%	58%	24%	51%	8%
Cable TV	0%	1%	4%	0%	0%	0%
Fibre network	0%	15%	26%	0%	0%	5%
Internet access over Mobile Phone	0%	0%	1%	0%	0%	0%
Mobile broadband	1%	0%	0%	62%	0%	0%
Satellite network	0%	0%	0%	11%	0%	0%
Fixed wireless connection	1%	0%	2%	0%	0%	13%
LEASED LINE (NET)	3%	6%	0%	0%	0%	74%
Analogue leased lines	3%	0%	0%	0%	0%	0%
Digital leased lines	0%	6%	0%	0%	0%	74%
Don't know	7%	1%	9%	4%	49%	%

Q.37

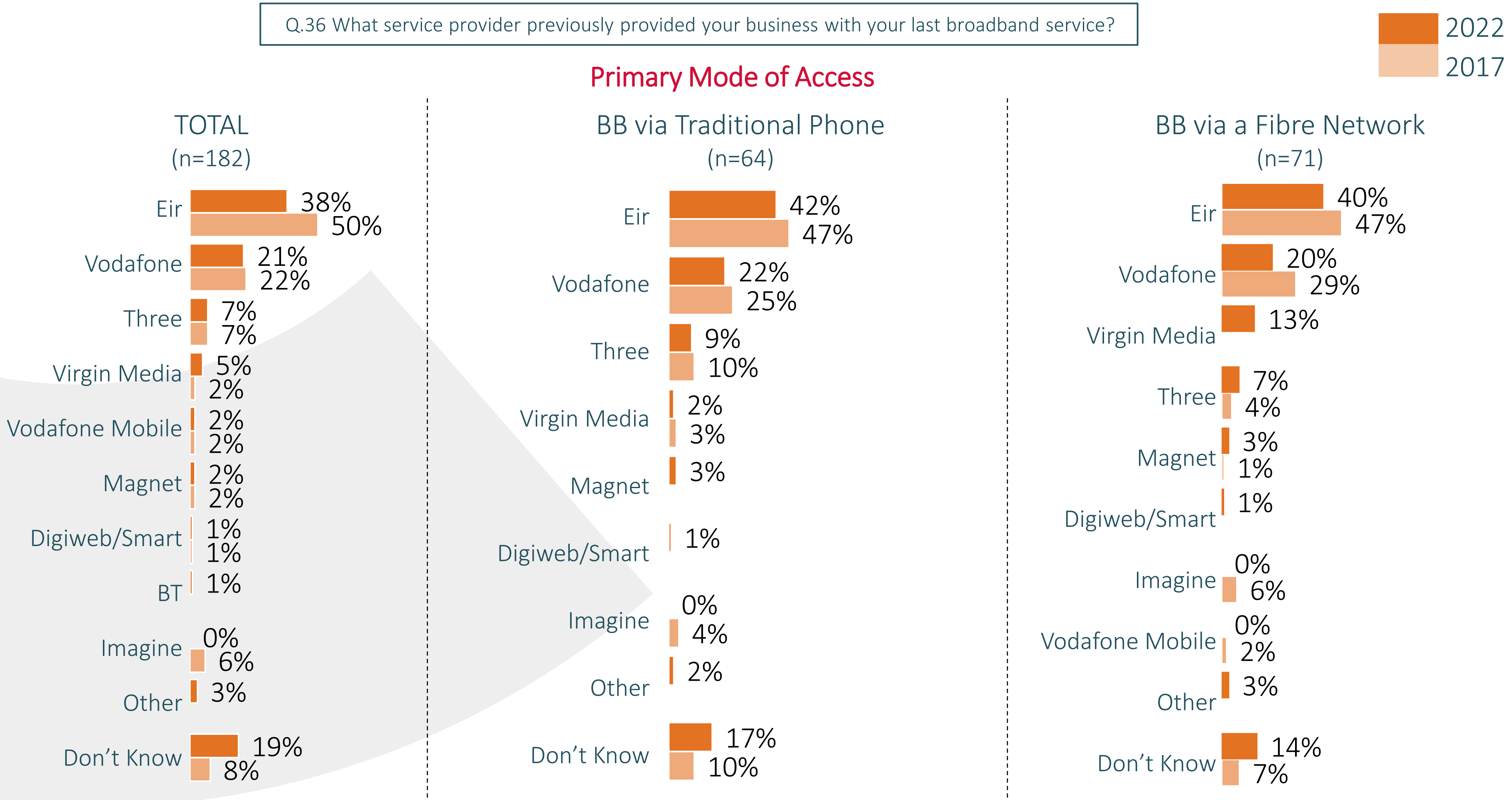
(Base: Total Broadband/Leased Line users Who Have Switched Provider, n=182)

*Caution Small Base Size

Previous platform used and provider share

Eir is the most common previous provider (but lower than in 2017)

Q.36 What service provider previously provided your business with your last broadband service?



Other Access types base too small to show

Q.36

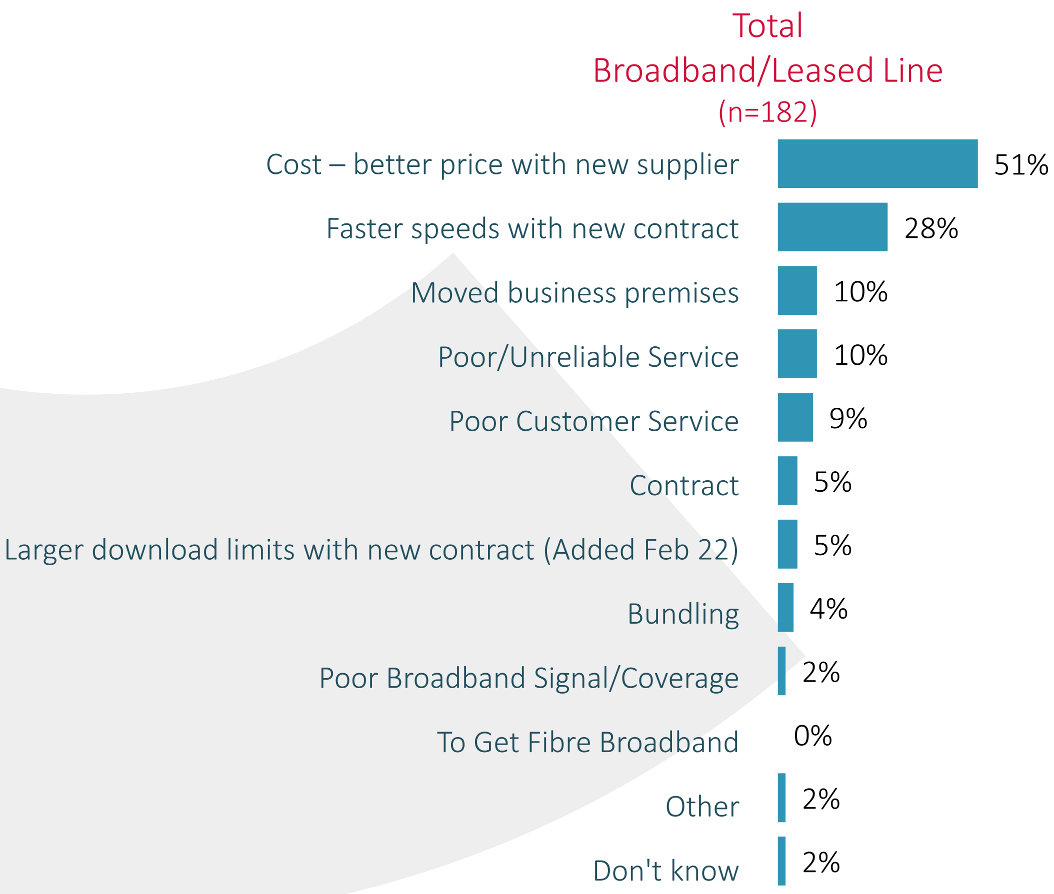
(Base: All Broadband Switchers within previous platform)

*Caution Small Base Size

Switchers – Reason(s) for Switching

Cost was the single most important reason for switching

Q38. How important were these factors in your decision to switch provider?



	Primary Mode of Access	
	BB Fixed Landline (n=70)	BB Fibre Network (n=76)
Cost – better price with new supplier	75%	45%
Faster speeds with new contract	15%	41%
Moved business premises	5%	9%
Poor/Unreliable Service	9%	9%
Poor Customer Service	6%	7%
Contract	4%	4%
Larger download limits with new contract (Added Feb 22)	3%	5%
Bundling	7%	6%
Poor Broadband Signal/Coverage	1%	0
To Get Fibre Broadband	0	1%
Other	2%	2%
Don't know	0	3%

Q.38

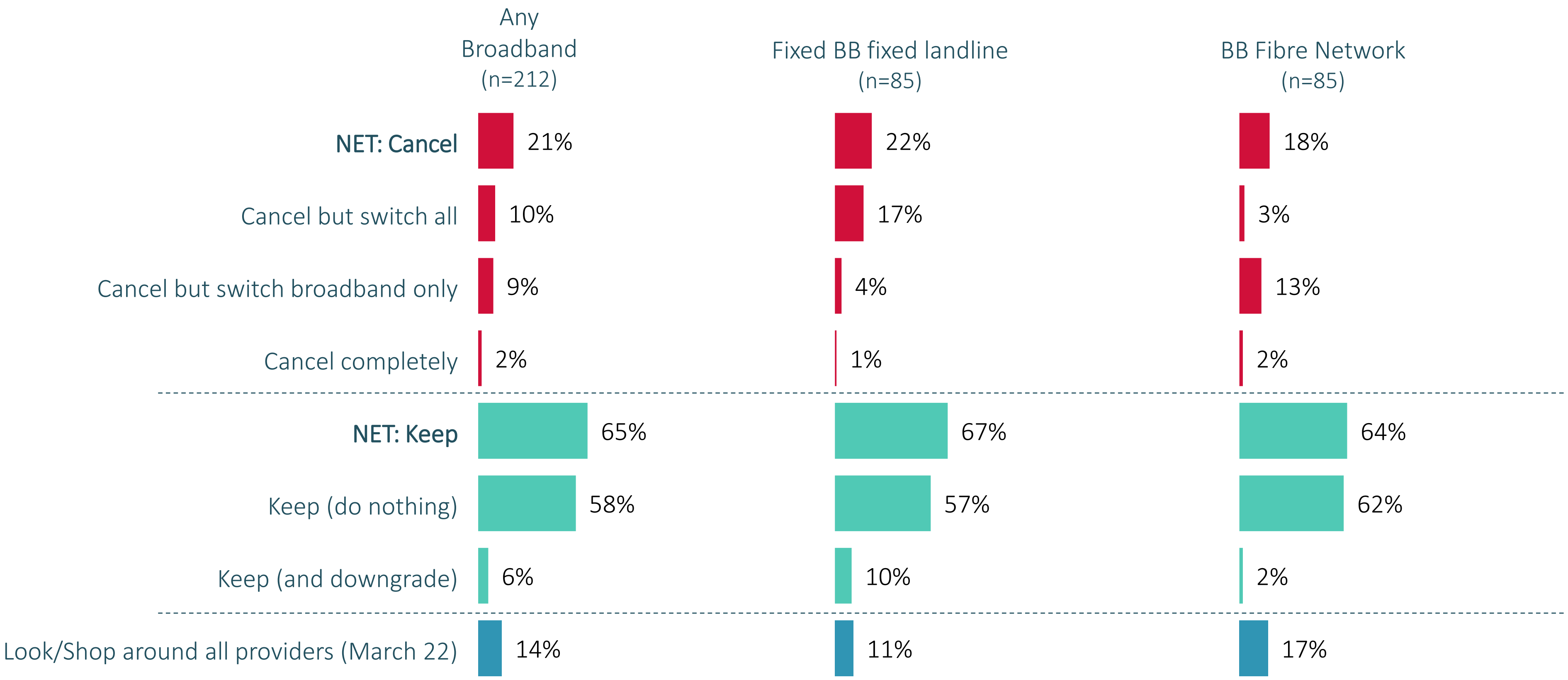
(Base: Total Broadband/Leased Line Users Who Have Switched Provider – n=182)

SSNIP
(Bundle Users)

Response to €4 price increase (bundle customers)

58% of businesses would do nothing if their current broadband service price rose by €4

Q25. Which of the following would describe what your business would be most likely to do in response to this hypothetical €4 price increase of your broadband service?

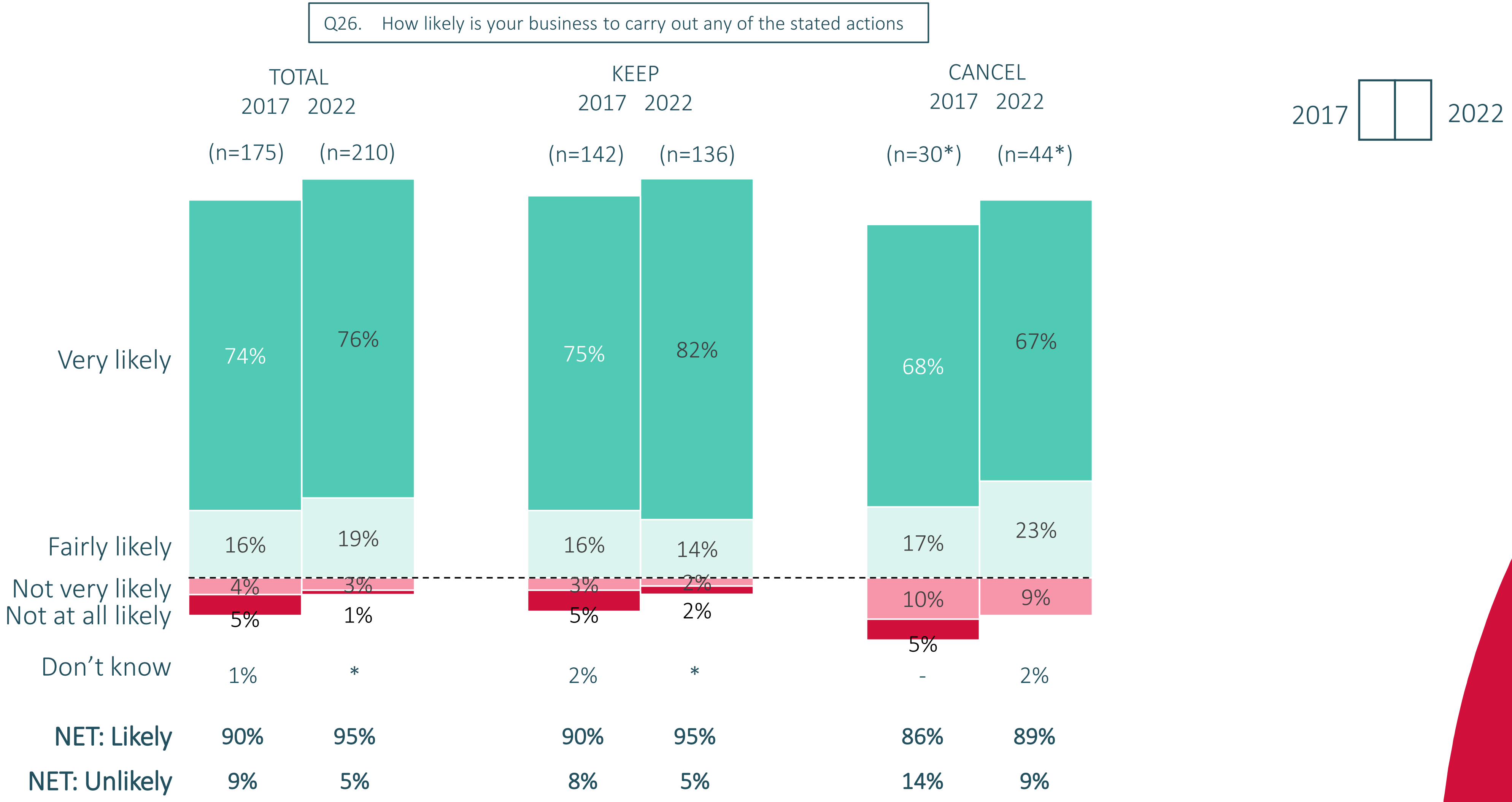


Q25.

(Base: All Bundle Owners – n=212)

Likelihood of following through with decision (bundle customers)

Almost all say they are likely to follow through with decision



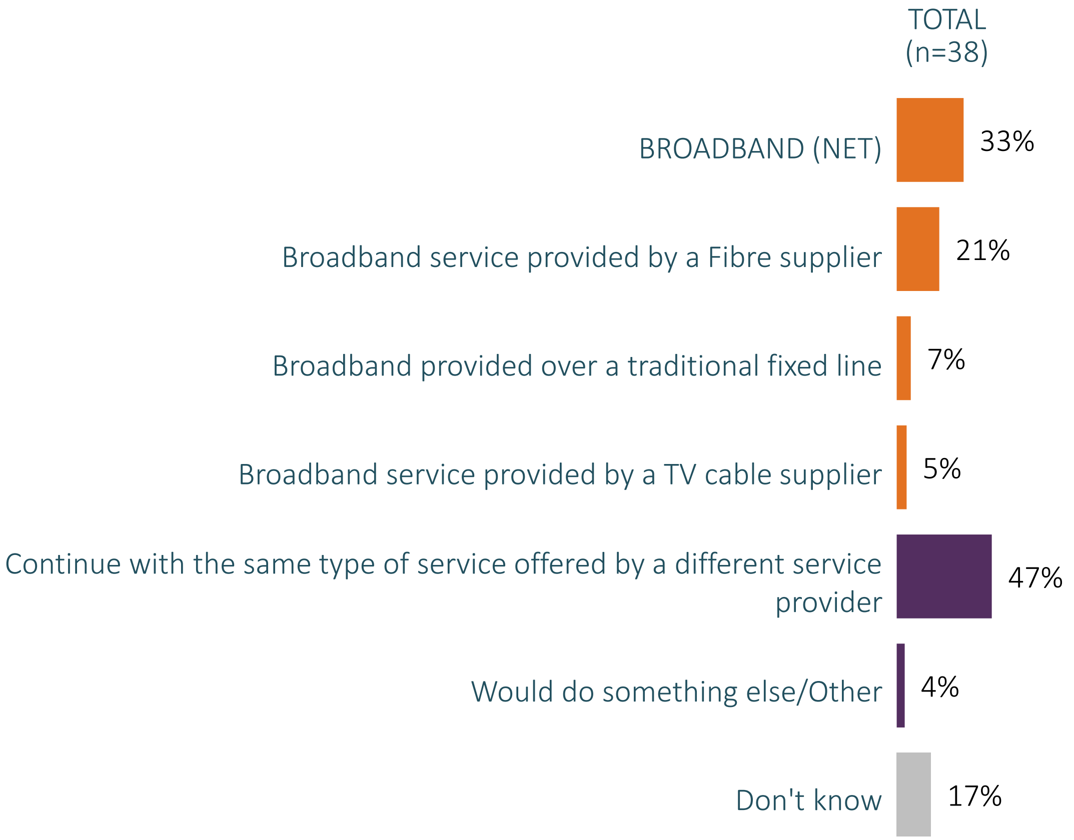
Q.26

(Base: All Broadband Bundle Owners Aware Of Likely Action – n=210)

Service likely to switch to (bundle customers)

33% are likely to switch to an alternative supplier of broadband

Q.27 You have just said that your business would be likely to give up your current broadband. Which type of broadband/leased line service other than your current service, if any, would your organisation be most likely to switch to?



Q.27

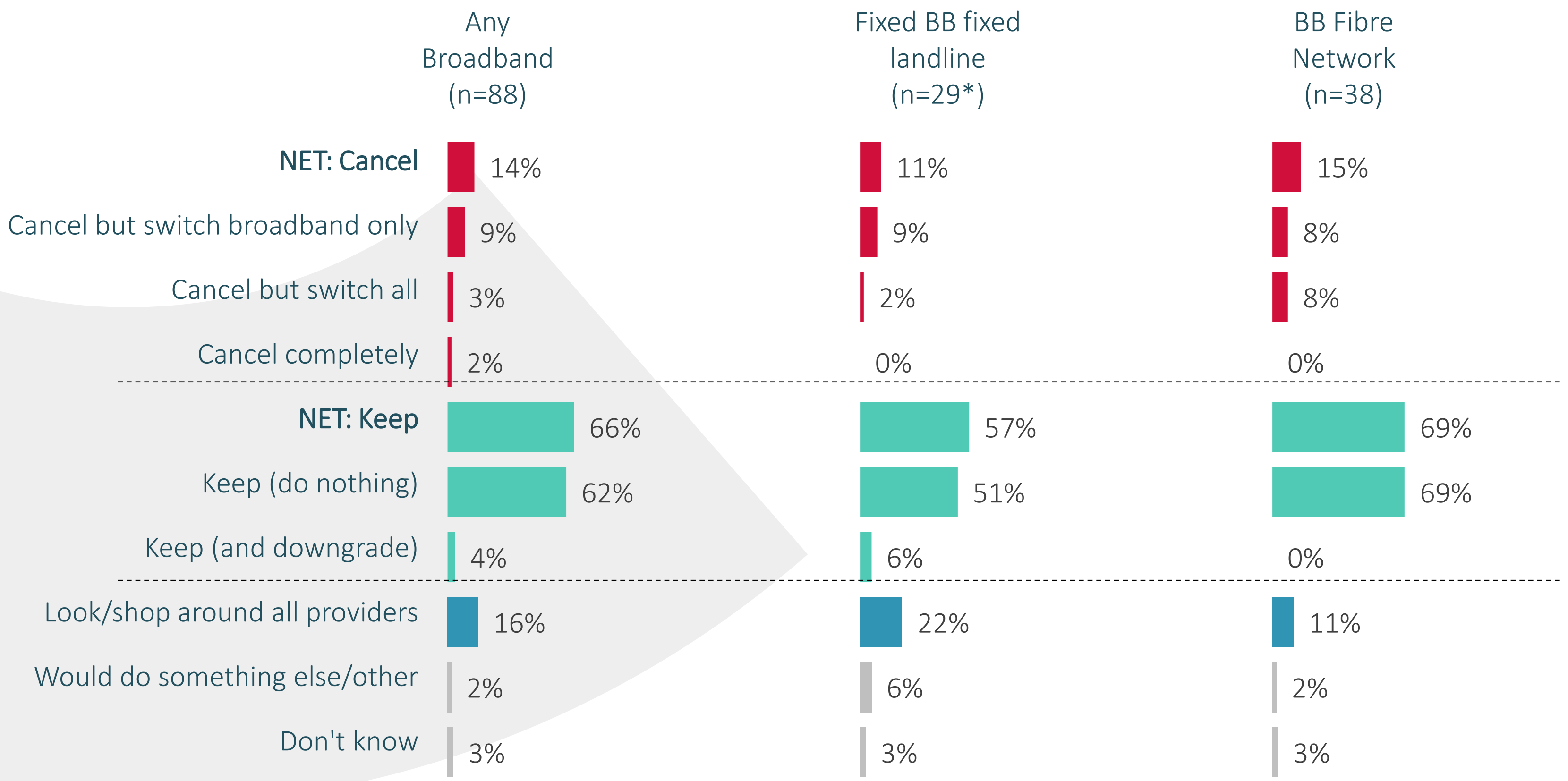
(Base: All Broadband Bundle and are likely to switch after price change –n=38)

SSNIP
(Non Bundle Users)

Response to €4 price increase (non bundle customers)

62% would do nothing if their broadband supplier increase cost by €4

Q.30 If all broadband/leased line suppliers supplying your current broadband access type increase the broadband cost by €4 per month what action would your business take?



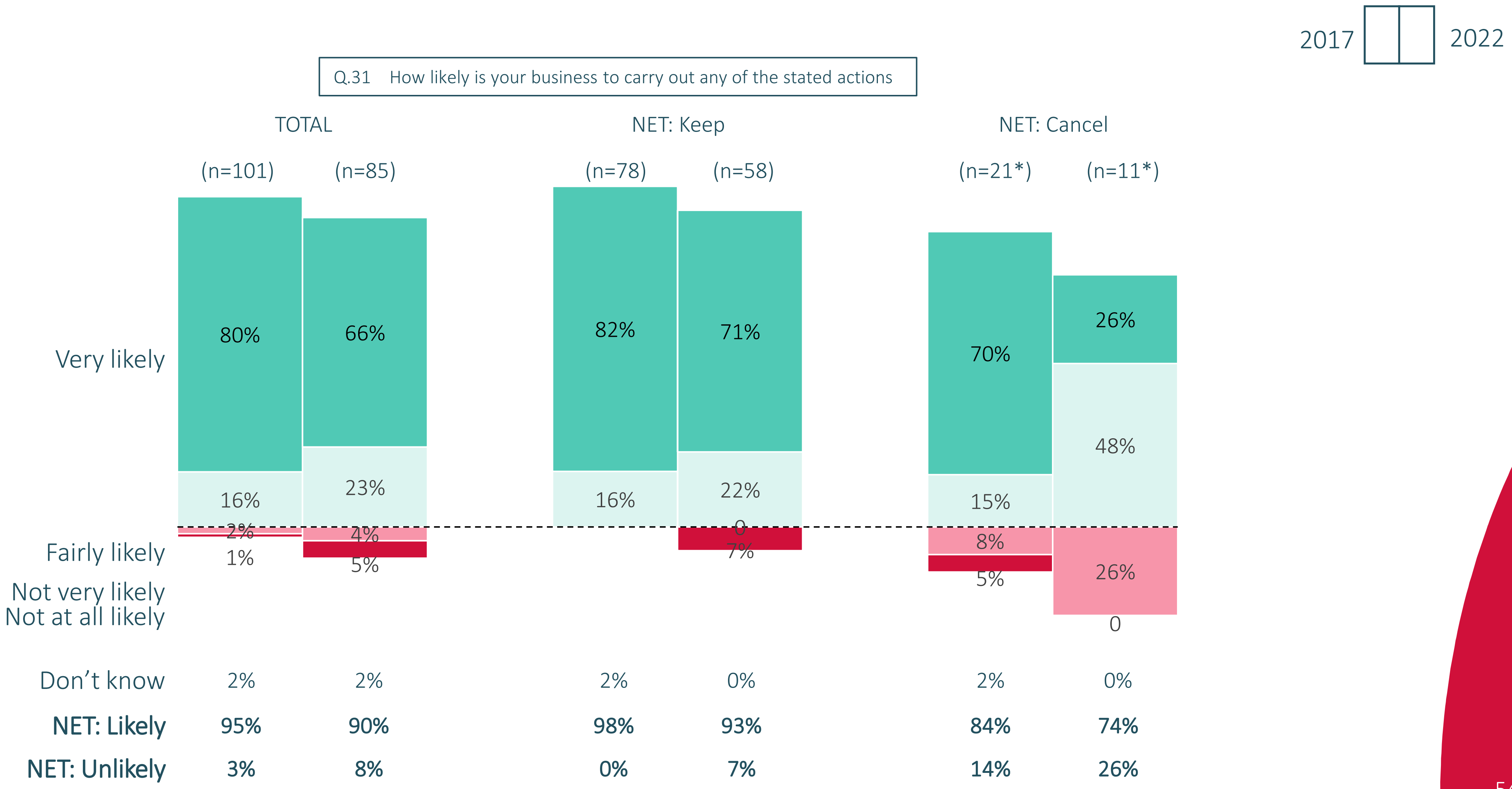
Q.30

(Base: All non bundle broadband owners – n=88)

*Caution Small Base Size

Likelihood to follow through with decision (non bundle customers)

9 in 10 are likely to follow through with decision



(Base: All Non-bundle Owners Aware Of Likely Action - n= 85)

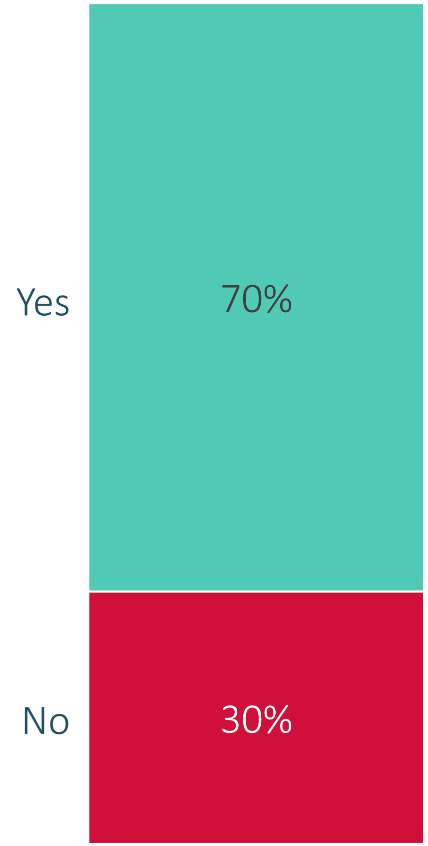
*Caution Small Base Size

National Broadband Ireland

Awareness of National Broadband Ireland

70% have heard of National Broadband Ireland

Q8b Have you heard of National Broadband Ireland (NBI), which has been contracted by the State to deliver the National Broadband Plan (NBP)?



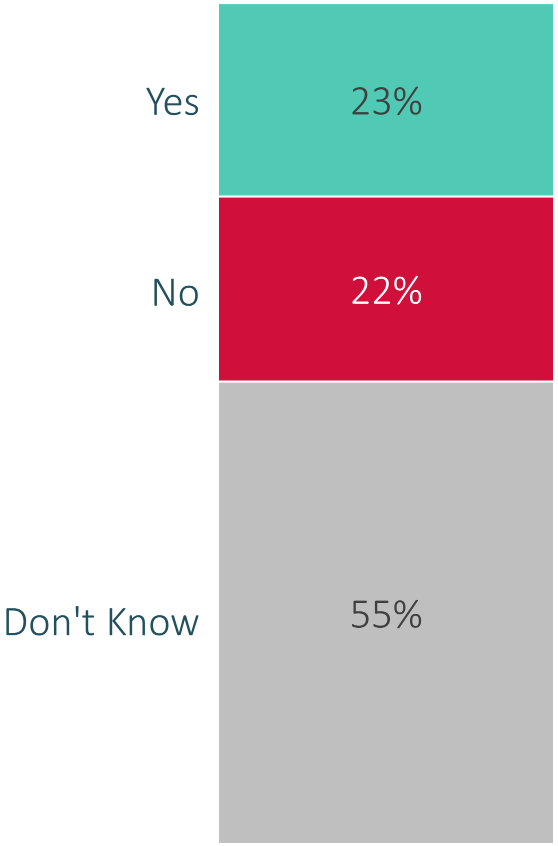
Q.8b

(Base: All SME Business Decision Makers, n=300)

Whether know if premises is in NBP intervention area

23% of SMEs know whether their business falls within the NBP intervention area

Q8c Do you know if your premises is in the NBP Intervention Area – that is, that NBI will build a broadband network passing your premises?



Q.8c

(Base: All aware of NBI, n=211)

Key Findings

Key Insights I

ComReg Business WLA/WCA Market Analysis 2022

1. Most SME businesses in Ireland have broadband only (87%) with an increasing number (14%) having both broadband and a leased line compared to similar research conducted in 2017.

2. 43% of SMEs access broadband via a traditional phone line connection. Fixed line connections are more popular in smaller companies and in Conn/Ulster, whilst fibre is more popular in ROL. Only larger companies use leased line to any great extent.

3. Eir have majority share of fixed line, fibre and leased lines although they have fallen back since 2017 in each case. Three lead on mobile broadband. Vodafone are a large provider across many access modes and have grown notably in the case of leased lines.

4. Data services such as cloud computing, employee remote access and VoIP have all grown significantly as uses of broadband since 2017.

5. Claimed awareness of maximum download speeds was lower in 2022 than 2017.

   The average speed across all broadband access types is 145Mbps (among those who claim to know their download speed).

6. 26% of SMEs have upgraded to a faster speed in the past 2 years. 37% of these switched provider while 57% stayed with the same provider. 28% paid extra for the additional speed. Half of those who spent more, don't know how much more.

Key Insights II

ComReg Business WLA/WCA Market Analysis 2022

7

72% receive a single bill which includes at least one additional service. 71% of these have fixed phone as an additional service with broadband, similar to 2017.

8

The claimed average monthly spend of a broadband and fixed line bundle is €152 a month, up 38% since 2017. Non-bundle customers spend €107 on average, which is broadly similar to 2017.

9

59% of SMEs are tied into contracts with their service supplier, down from 73% in 2017. 70% have been with their providers for 3 or more years, up from 51% in 2017.

10

The majority of SMEs are aware of how much they're paying for broadband component of their bundle and of those who are, the average is €85 per month.

11

Only 17% of Irish SMEs have switched provider in the past 3 years. 46% switched longer than 3 years ago, and 36% have never switched. Eir was the most common previous provider, followed by Vodafone. 51% of SMEs switched because of cost and 28% for faster speeds.

12

65% of SME bundle users and 66% of SME non-bundle users would keep their service if faced with a €4 price increase. 21% and 14% respectively would cancel, while 14% and 16% would shop around first. Those who would opt to keep their current plan, report being likely to follow through with this decision.

13

7 in 10 have heard of NBI. 23% say their premises is in the NBP intervention area, 22% say it's not and 55% don't know.

RESEARCH EVALUATION DIRECTION **CLARITY**

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