



An Coimisiún um
Rialáil Cumarsáide
Commission for
Communications Regulation

Ireland Communicates Survey 2017

SME Survey

ComReg 18/23b

Five Key Findings

1. Penetration of most ICT services within Irish SMEs is broadly unchanged since previous survey in 2015, with the exception being a sharp decline in usage of mobile broadband services.
2. Two-thirds of SMEs purchase ICT services within a bundle. Bundled packages involving mobile services are more commonly used than they were in the previous survey. Price is the key motivator for choosing to bundle services together, although the majority of those with a bundle remained with the same provider when last subscribing to a bundled package.
3. Almost a third of those SMEs with a bundle indicate they are likely to switch providers in the next 12 months. This is higher than the proportion intending to switch fixed broadband and mobile, and in line with the proportion intending to switch landline phone service.
4. Over two-thirds of SMEs never use VOIP services, with the majority of those using the service indicating that it has no impact on the number of traditional voice calls they make to landline and mobile numbers.



Introduction & Methodology

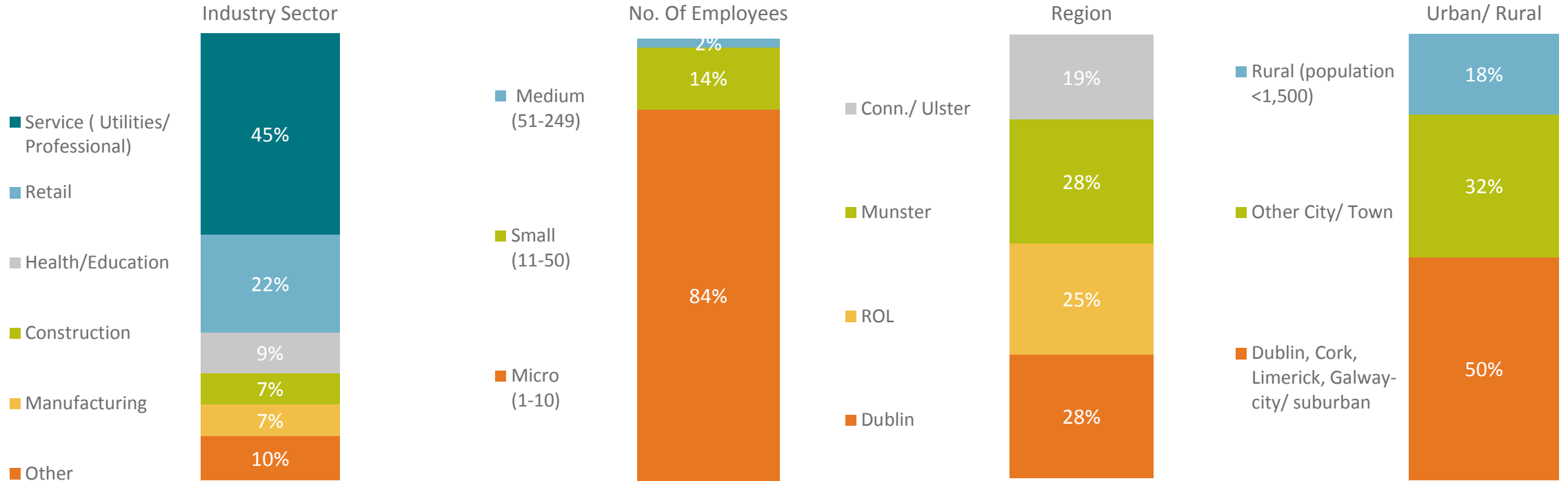


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Introduction & Methodology

- The Commission for Communications Regulation (ComReg) commissioned Ipsos MRBI to undertake surveys among Small and Medium Sized Enterprises (SMEs). Fieldwork was conducted between 18 October and 7 November 2017.
- The objective of the research is to provide an understanding of SME usage of telecommunications services (landline, mobile phone, fixed broadband and mobile broadband). It also explores current and anticipated future use of various technologies by businesses.
- Surveys were conducted with a total of 509 SMEs (i.e. business with up to 250 employees). Interviewing quotas were set for business sector, number of employees and region. For the purposes of ensuring robust analysis, additional interviews were conducted among businesses with 50 or more employees. A weighting scheme was used to bring the sample in line with the profile of all SMEs.
- Interviews were conducted using a CATI approach (Computer Assisted Telephone Interviewing).
- Interviews were conducted with the person responsible/ jointly responsible for telecommunication decision making within the business.
- Where questions and answer options were identical or very similar, comparisons were made with the findings the 2013 and 2015 ICT Tracker Surveys.

Profile of Survey Sample (Weighted)



Other = Wholesale (4%), Government/ Social Service (4%), Agriculture/ Forestry/ Fishing (2%)

Survey sample was obtained from business listings provided by The Bill Moss Partnership. Post-survey weighting was undertaken to bring the sample in line with the known profile (business sector, number of employees and region) of businesses according to these business listings.



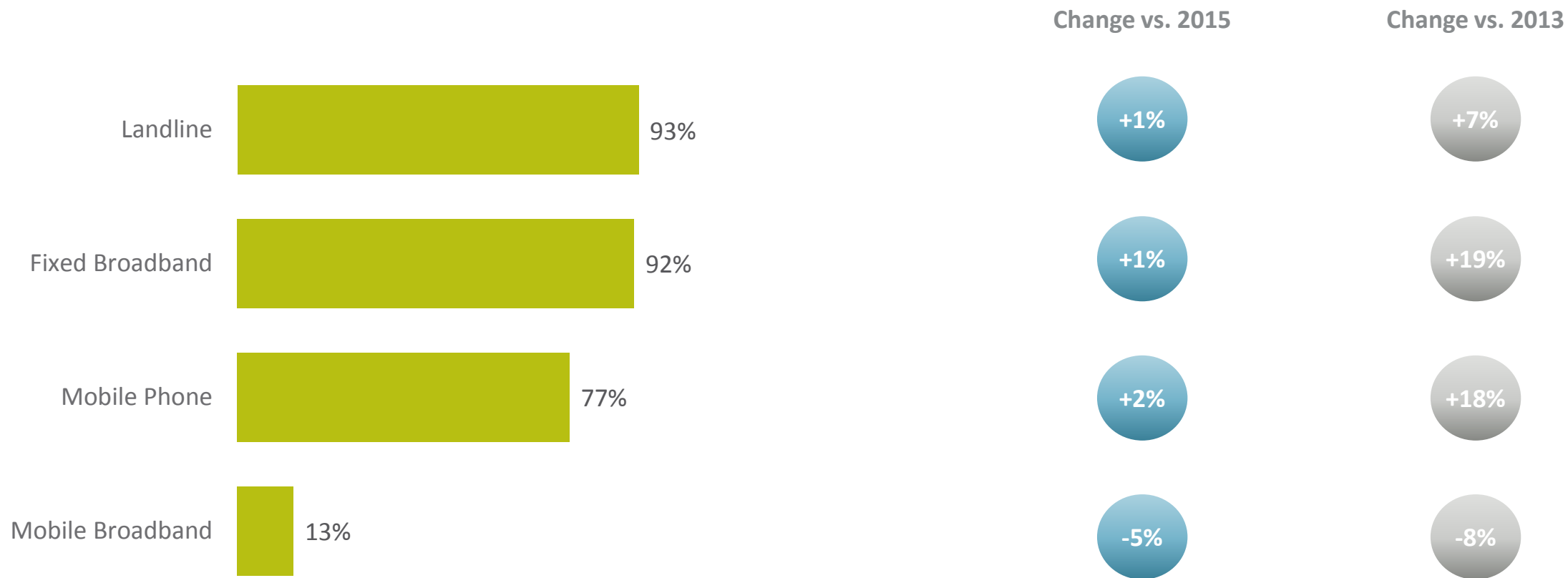
Telecoms Usage



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Over 9 out of 10 SMEs in Ireland have landline and/or fixed broadband services. Penetration of mobile broadband services continues to decline, with roughly 1 in 8 SMEs currently using this service.

Services Used



*All SMEs interviewed availed of at least one of the above services

Q.1a Which of the following telecommunications services does your organisation use for business purposes?

Base: 508



Services Used

%	Sector									Region			Business Size		
	Total	Service (Utilities/ Professional)	Retail	** Wholesale	** Construction	Manufact.	** Health/ Education	*Govt./ Social Service	**Agri./ Forestry/ Fishing	DCLG city/ suburban	Other City/ Town	Rural (<1,500 population)	Micro	Small	Medium
Landline	93	93	97	95	83	80	100	*	87	92	93	98	93	95	93
Mobile Phone	77	78	76	96	90	80	55	*	99	78	76	76	76	79	85
Mobile Broadband	13	13	12	28	22	15	1	*	17	13	15	12	11	22	40
Fixed Broadband	92	95	84	90	90	84	98	*	87	95	92	82	91	98	100

Q.1a Which of the following telecommunications services does your organisation use for business purposes?

Base: 508

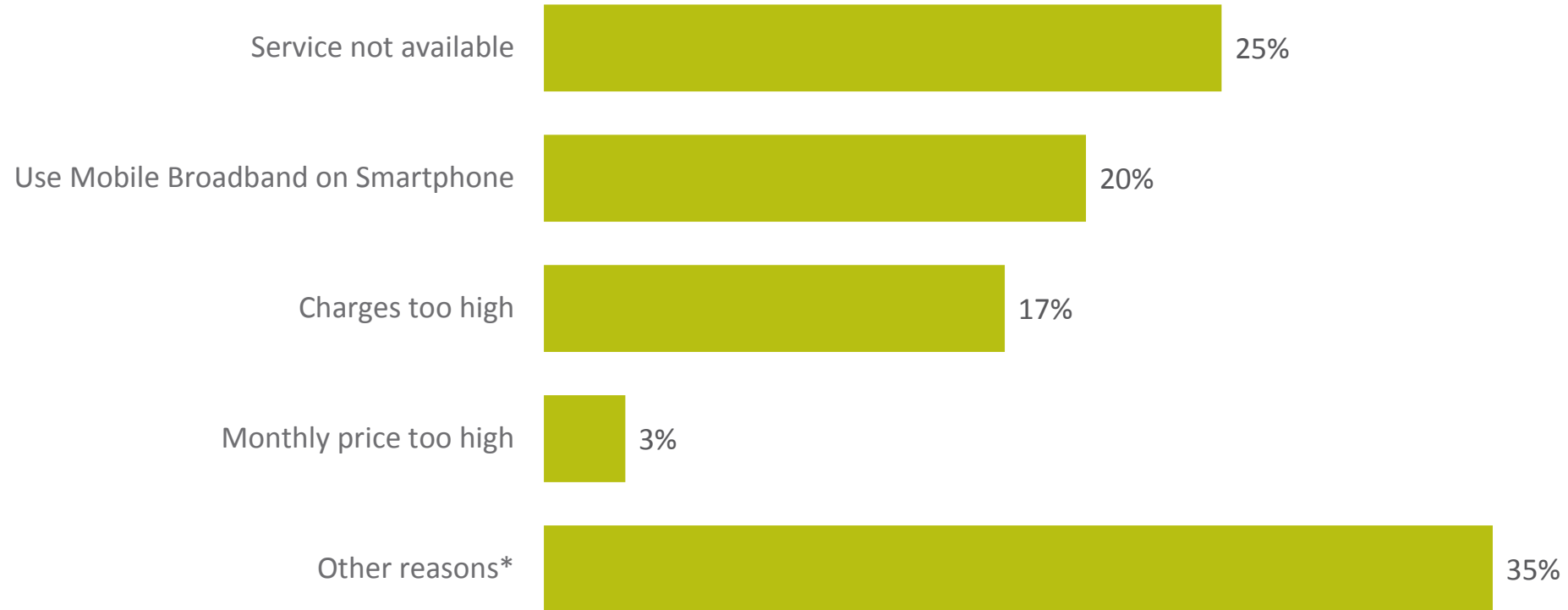
* = base size too small

** = caution, base size <50

Very few SMEs (8%) do not use broadband, and the reasons for not doing so are very disparate.

Reasons for Not Having Broadband Access

**Caution, small base size*



Q.2 Why do you currently not have access to the Internet/Broadband in your business?

Base: 22

9

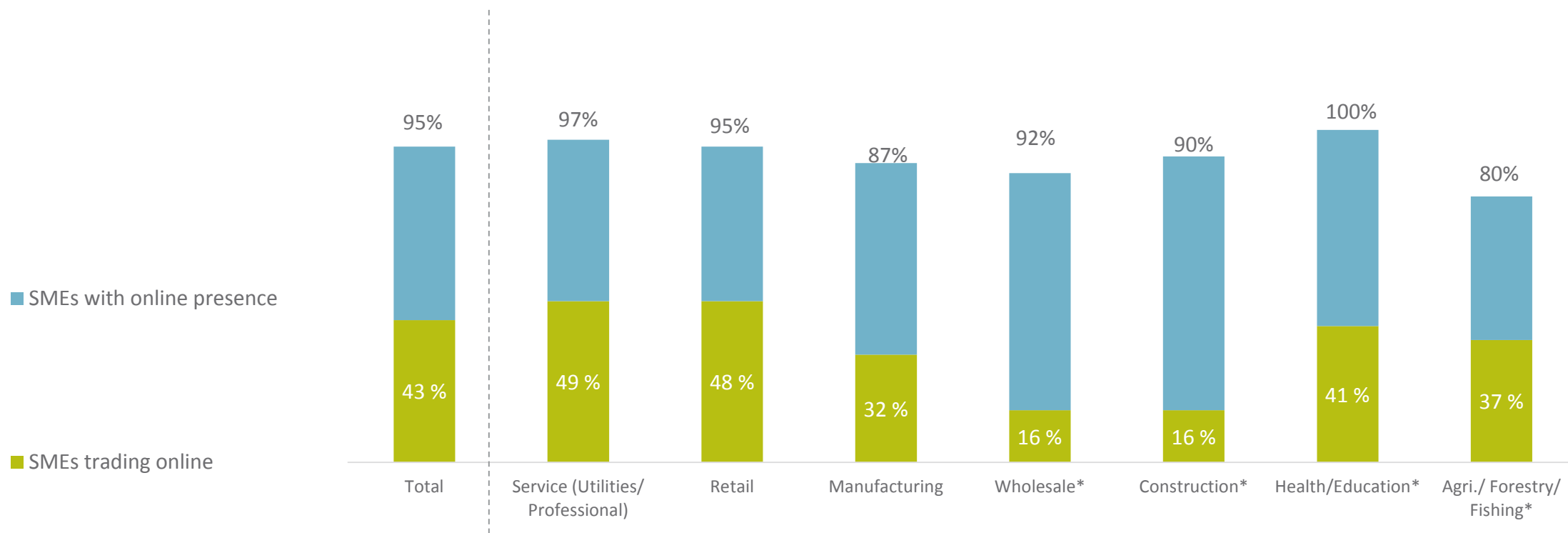
* Insufficient number of respondents to facilitate further breakdown of responses.



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While the vast majority of SMEs have an online presence, fewer than half use this presence to trade online. SMEs in the Services and Retail sectors are most likely to do so.

SMEs with Online Presence



Q.88a Does your business have an online presence?

Base: 508

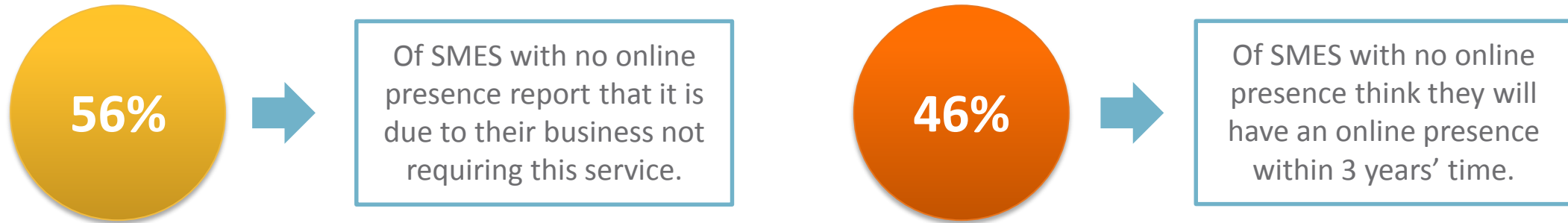
Q.88b Does your online presence allow your customers/users to order/book/buy your services or goods online?

Base: 485

The main reason for SMEs not having an online presence is because their business does not require it, however almost half (46%) of these see themselves as having an online presence in three years time

Reasons for Not Having an Online Presence

**Caution, small base size*



Q.88c What are the reasons for your business not having an online presence?

Base: 23

Q.88d Do you think your business will have an online presence in 3 years' time?

Base: 23

* Insufficient number of respondents to facilitate further breakdown of responses.

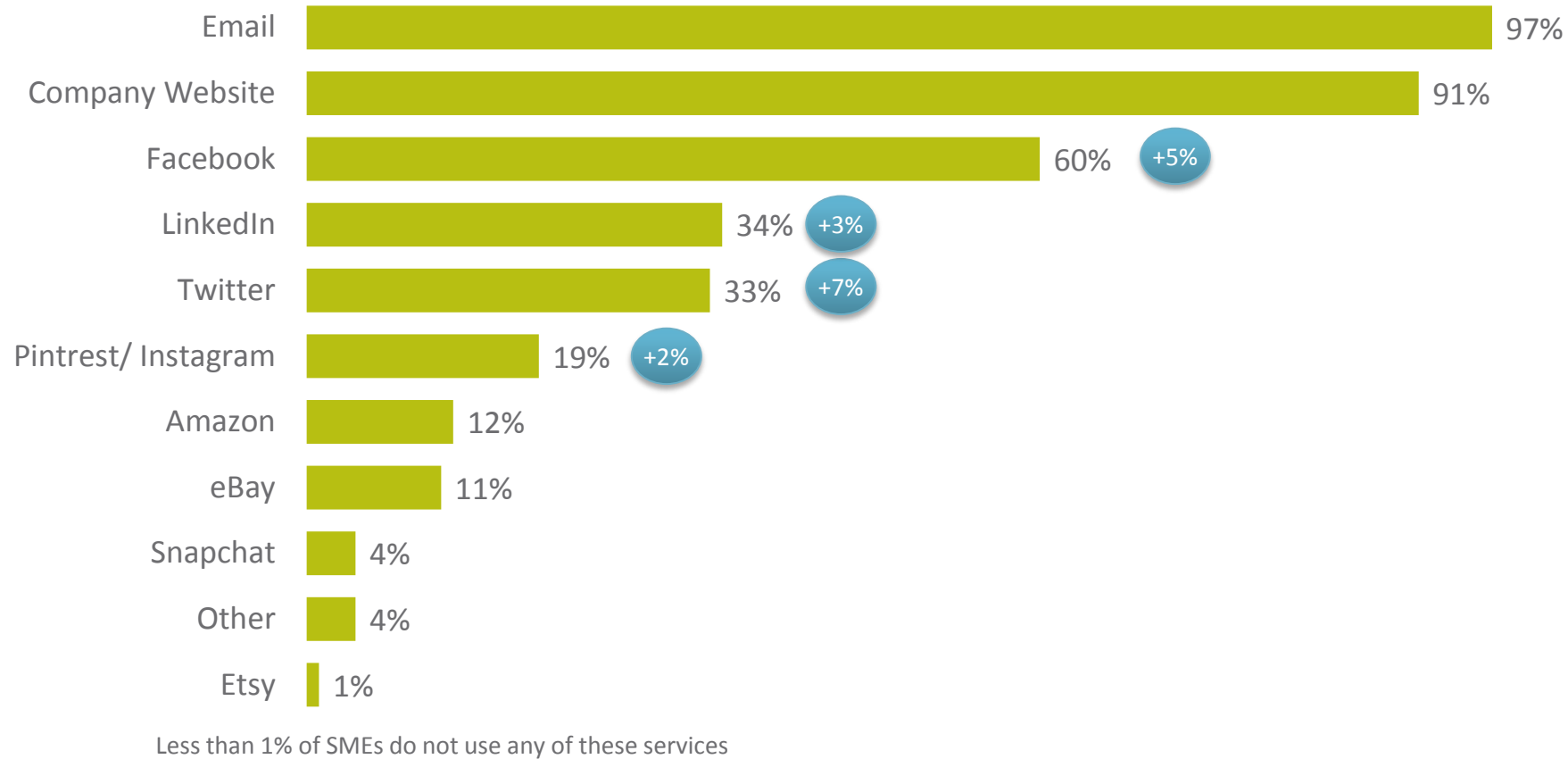


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Email and website are the most commonly used online services. Social media usage has seen an increase since 2015, with Facebook, Twitter, Pinterest/Instagram and LinkedIn all seeing increases in this respect.

Online Services Used



Q.3 Which of the following, if any, services does your organisation use for business purposes?

Base: 508

12

Online Services Usage

%	Sector									Region			Business Size		
	Total	Service (Utilities/ Professional)	Retail	** Wholesale	** Construction	Manufact.	** Health/ Education	*Govt./ Social Service	**Agri./ Forestry/ Fishing	DCLG city/ suburban	Other City/ Town	Rural (<1,500 population)	Micro	Small	Medium
Company website	91	93	90	84	90	84	96	*	68	93	90	90	91	91	92
Email	97	98	96	100	94	96	100	*	96	98	95	98	97	100	98
Facebook	60	49	80	46	52	62	71	*	63	57	62	68	59	70	60
Twitter	33	33	42	20	6	38	43	*	14	33	36	27	31	46	53
Snapchat	4	3	9	0	3	4	1	*	0	4	4	7	4	6	13
Pinterest/ Instagram	19	15	35	4	12	27	18	*	10	21	17	18	20	18	19
LinkedIn	34	43	23	25	28	44	17	*	14	41	29	22	33	37	41
eBay	11	10	19	6	12	6	8	*	6	13	10	10	11	12	10
Amazon	12	11	14	4	13	9	8	*	7	12	10	14	11	17	8
Other	4	4	6	0	0	6	0	*	0	4	5	1	4	3	4

* = base size too small

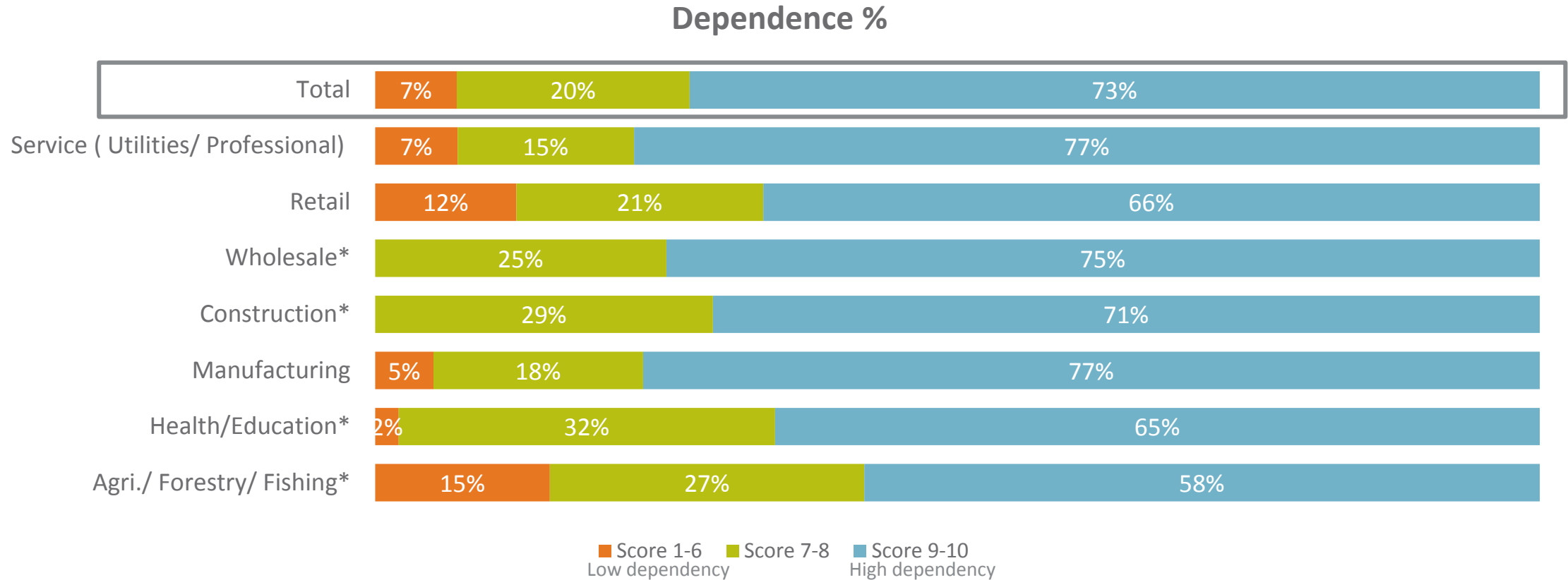
** = caution, base size <50

Q.3 Which of the following, if any, services does your organisation use for business purposes?

Base: 508

The majority of SMEs have a very high dependence on telecommunication services. Almost three-quarters of SMEs rate their dependency as either 9 or 10 (out of 10)

Dependence on Telecommunication Services



Q.86 Out of 10 where 1 is not at all dependent and 10 is very dependent how dependent would you say your business is on the telecommunications services you currently have and use within your business?

Base: 508



*Caution, base size <50

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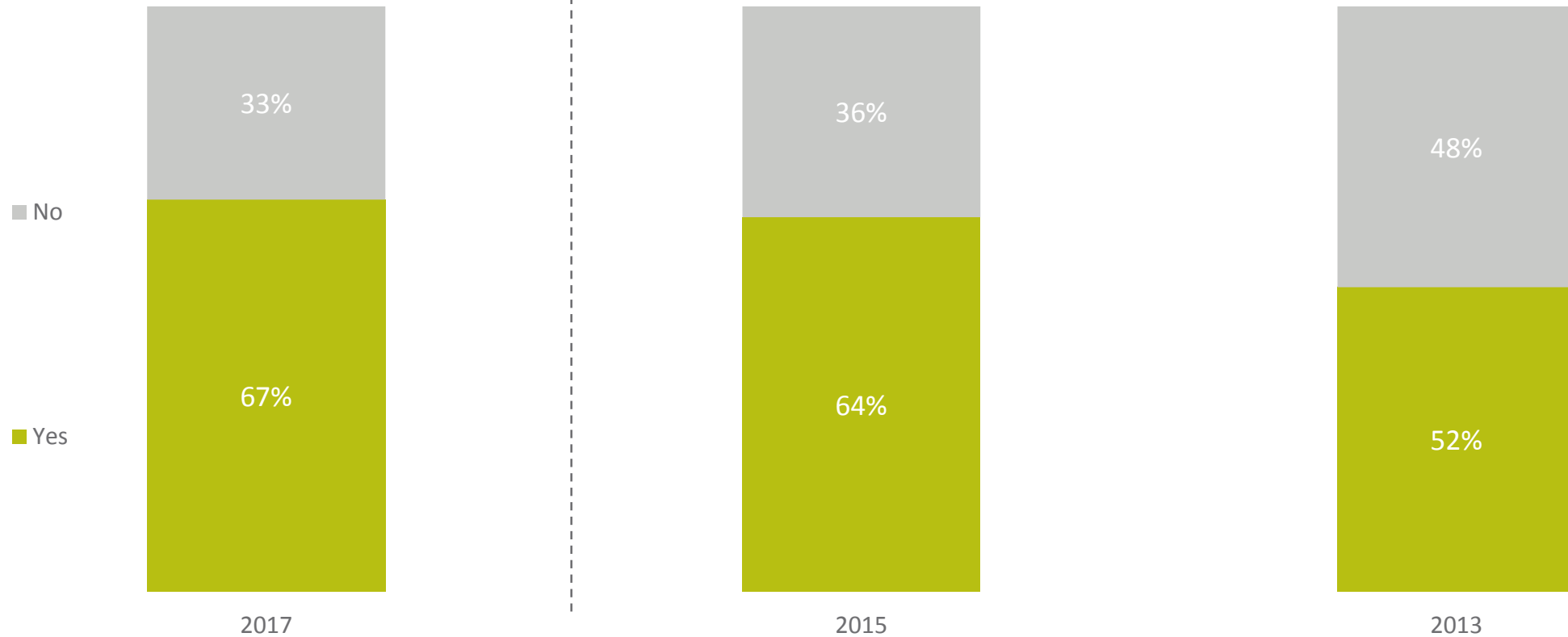


Bundling



Two-thirds of SMEs indicate that they bundle two or more services together. This has increased from just over half of SMEs in 2013.

Bundle Ownership



Q.12 I would like you to think back to when you last purchased any one of the following services. Did you purchase more than one of these services as part of an overall price ?

Base: 508

16



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Bundle Ownership



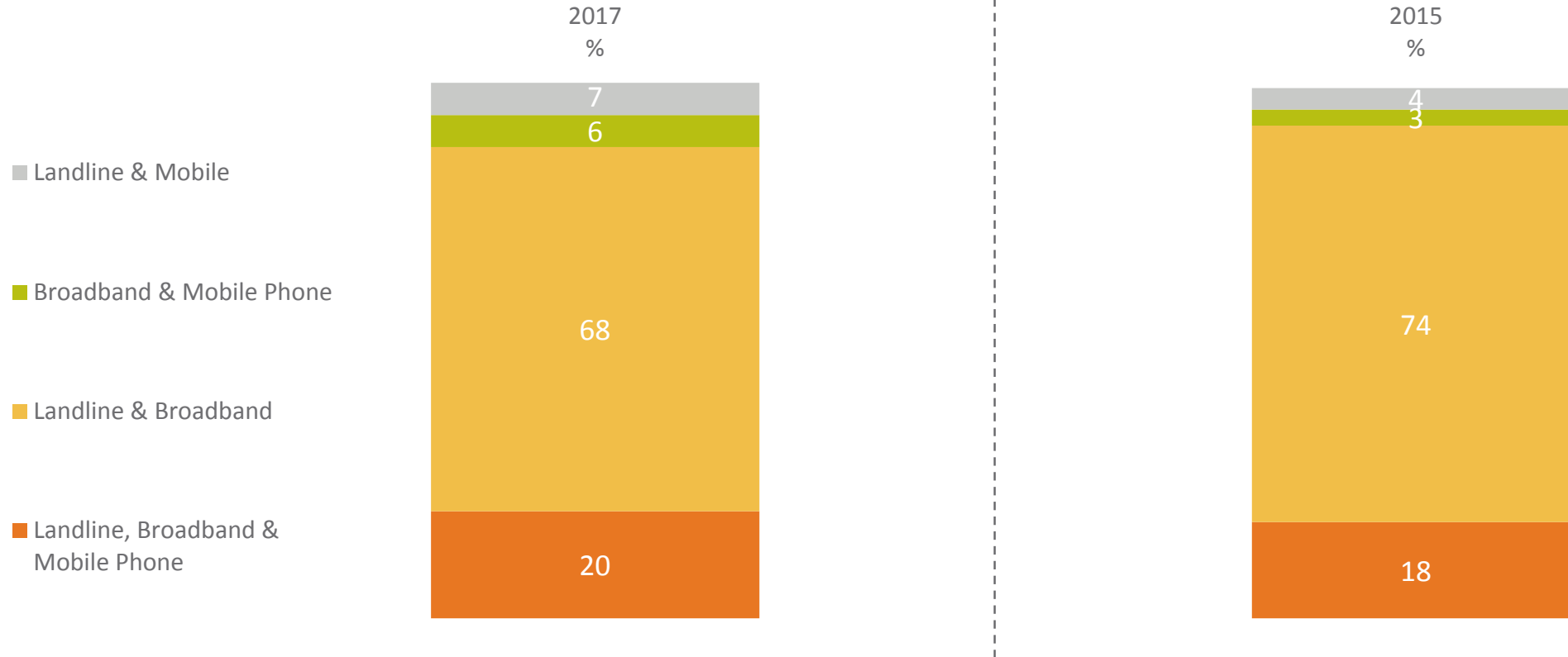
		%
Sector	Service (Utilities/ Prof.)	67
	Retail	67
	*Wholesale	64
	*Construction	61
	Manufacturing	74
	**Health/Education	69
	*Govt./ Social Service	*
	**Agri./ Forestry/ Fishing	63
	DCLG city/ suburban	74
Region	Other City/ Town	63
	Rural (<1,500 population)	54
	Micro	68
Size	Small	64
	Medium	51

Q.12 I would like you to think back to when you last purchased any one of the following services. Did you purchase more than one of these services as part of an overall price ?

Base: 329- Yes

While landline and broadband remain the most common form of bundling, there has been a greater uptake of other forms of bundles

Bundle Type Ownership

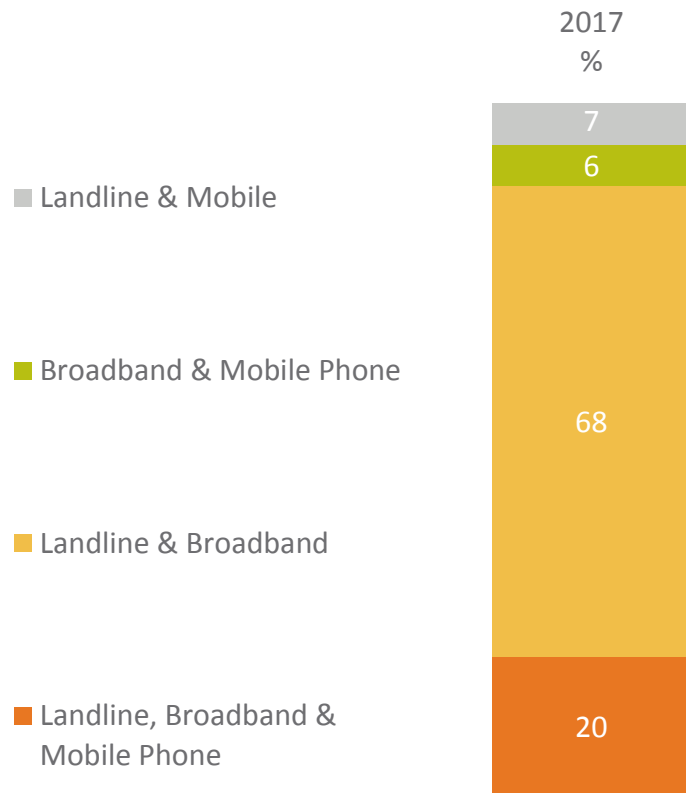


Q.13a Which of these bundle options, if any, do you currently have in your business with the same provider?

Base: 322



Bundle Type Ownership



	2017	Landline, Broadband & Mobile Phone	Landline & Broadband	Broadband & Mobile Phone	Landline & Mobile Phone
Sector	Service (Utilities/ Prof.)	22	66	7	4
	Retail	23	62	4	10
	Wholesale	32	66	1	3
	Construction	7	87	6	0
	Manufacturing	20	64	15	2
	**Health/Education	8	72	0	20
	*Govt./ Social Service	*	*	*	*
	**Agri./ Forestry/ Fishing	40	57	2	0
Region	DCLG city/ suburban	22	67	6	5
	Other City/ Town	19	66	7	8
	Rural (<1,500 population)	15	75	1	9
Size	Micro	19	69	5	7
	Small	26	61	6	8
	Medium	15	69	16	4

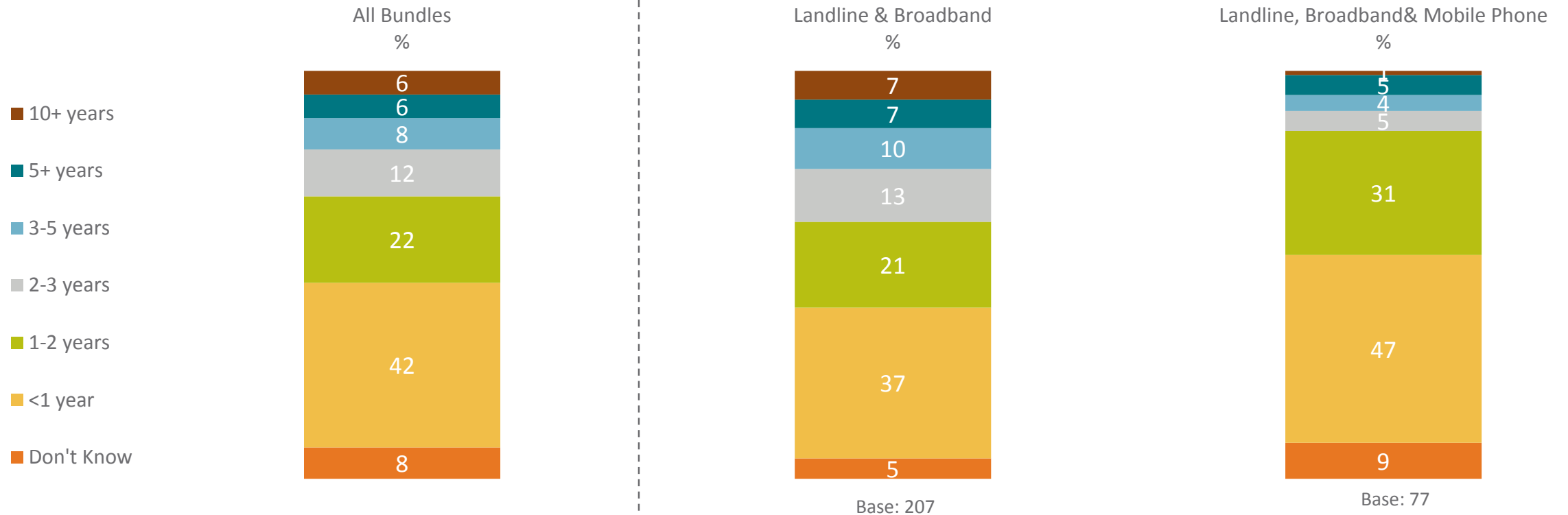
Q.13a I would like you to think back to when you last purchased any one of the following services. Did you purchase more than one of these services as part of an overall price ?

Base: 322

19

42% of SMEs subscribed to their main bundle within the past year. Only a small percentage (12%) of SMEs have been with their bundle service provider longer than 5 years.

Bundles - Length of Subscription



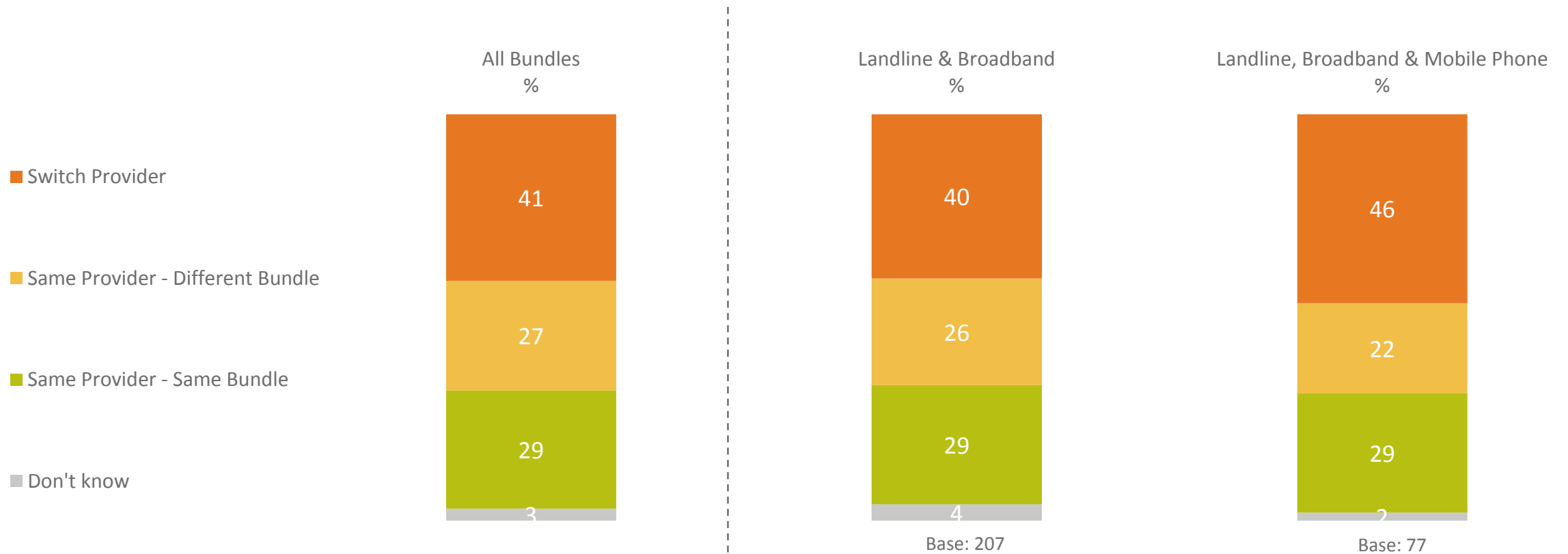
*Other Bundle types not shown due to small base sizes (<50).

Q.14c How long ago did you subscribe to this bundle?

Base: 329

While 41% of those subscribing to a bundle switched providers when doing so, the majority remained with the same provider (either adopting a different bundle or renewing a subscription to their existing one).

Bundles - Switching Providers



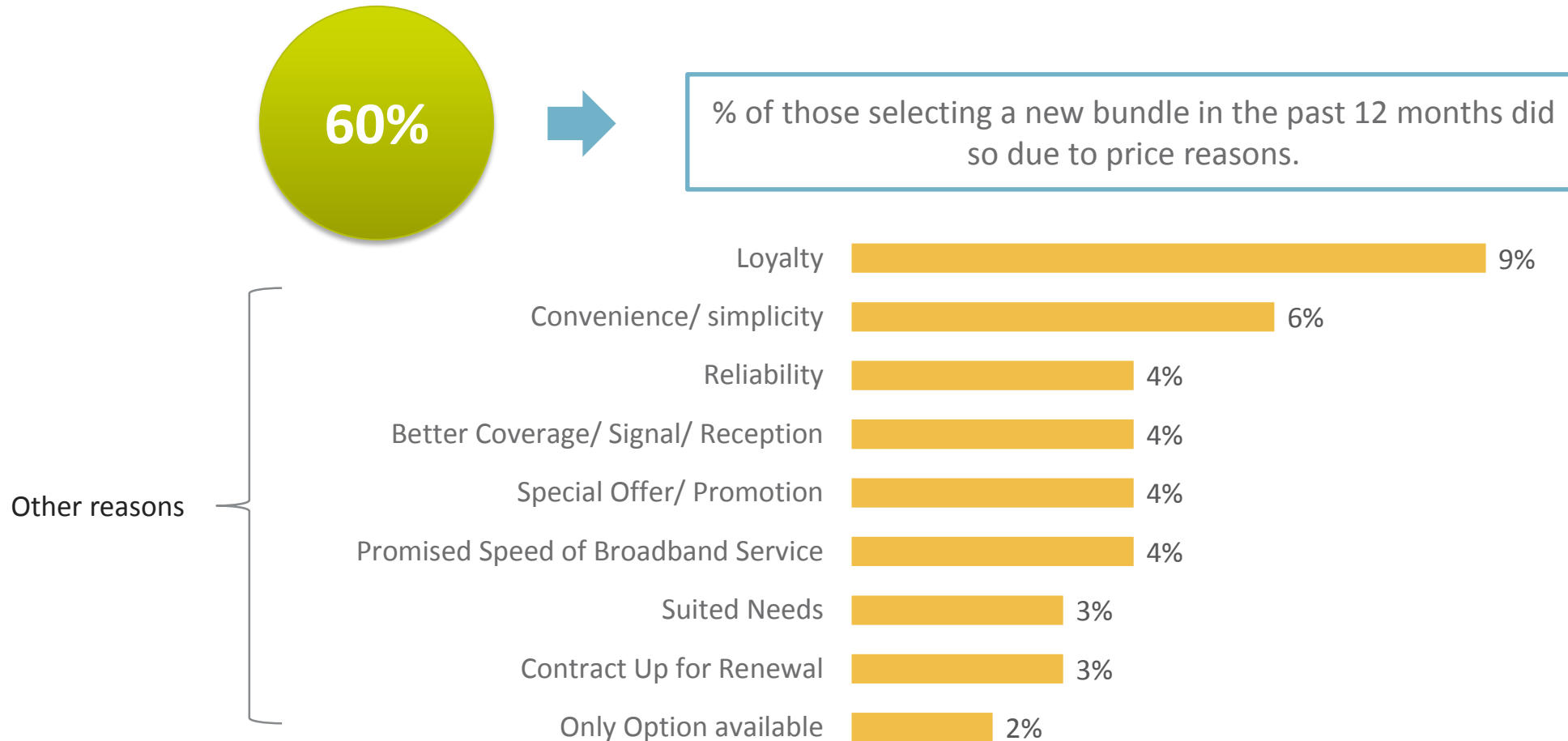
*Other Bundle types not shown due to small base sizes (<50).

Q.14d When you subscribed to this bundle did you remain with the same service provider or move from one service provider to another to avail of this bundle?

Base: 329

The majority selecting a new bundle in the past 12 months did so to avail of a competitive price

Bundles - Main Reasons for Selecting Providers



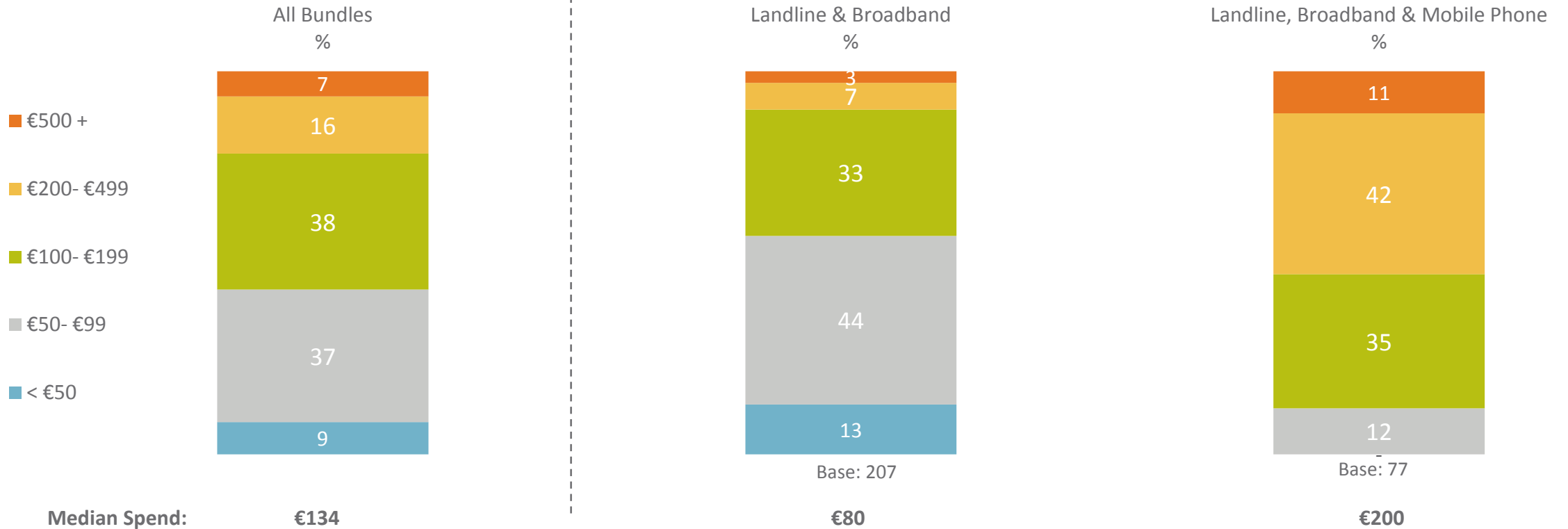
Q.15 Why did you select this bundle within the past year?

Base: 132

22

The median bundle spend is €134. Naturally, those with bundles that include three services have a higher median spend than those that only include two services.

Spend on Bundled Services



Q.14b How much do you pay per month for these services?

Base: 242

*Other Bundle types not shown due to small base sizes (<50).



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Almost half of those with a bundle indicate that they are unlikely to switch provider with the next 12 months. This increases to almost 60% when taking into consideration those tied into a contract.

Likelihood of Switching Bundle Providers in the Coming Year



*Other Bundle types not shown due to small base sizes (<50).

Q.17 How likely are you to consider switching your service provider within the next 12 months?

Base: 322



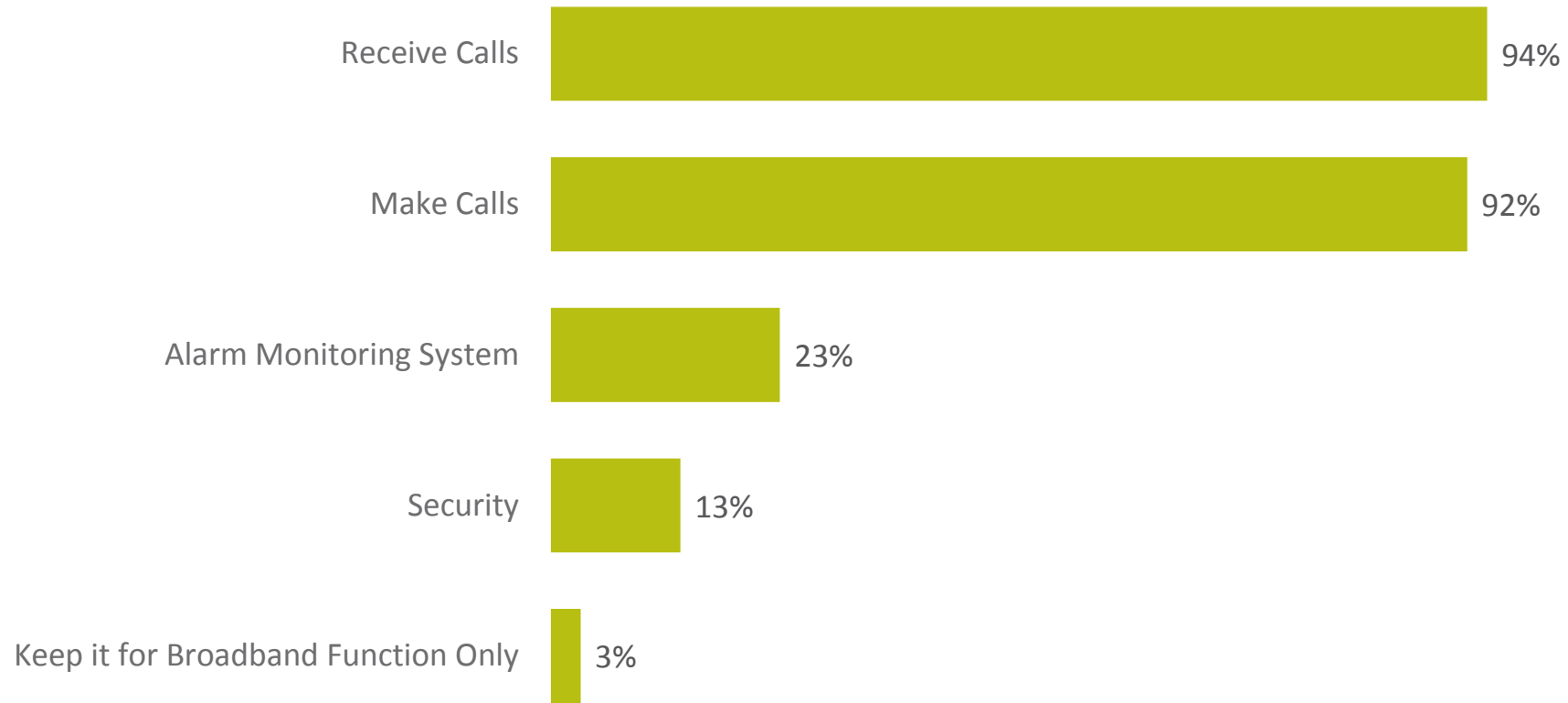
Landline Usage



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Landline services are most commonly used for making and receiving calls, although some SMEs also use these services for alarm monitoring/security functions.

Landline Services Usage



Q.19 What do you and other employees in your business use your landline telephone service for?

Base: 473



Landline Services Usage

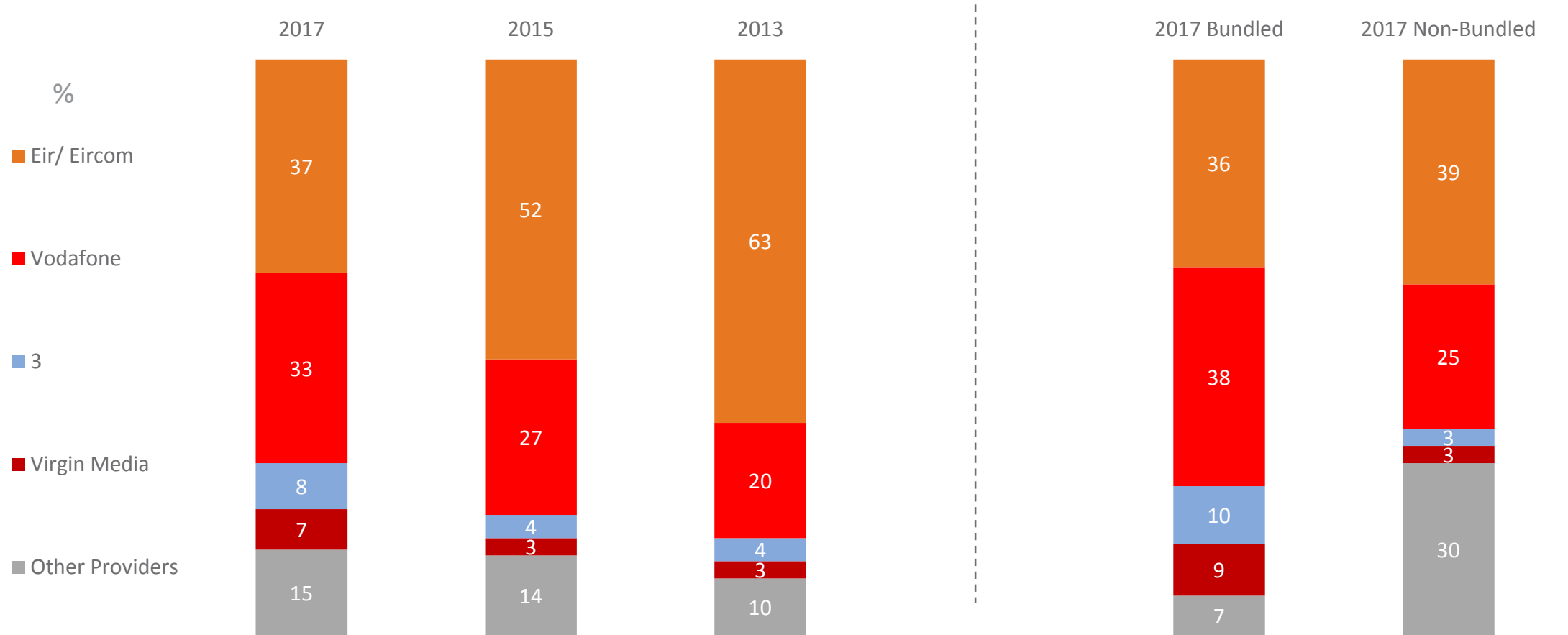
%	Sector									Region			Business Size		
	Total	Service (Utilities/ Professional)	Retail	** Wholesale	** Construction	Manufact.	** Health/ Education	*Govt./ Social Service	**Agri./ Forestry/ Fishing	DCLG city/ suburban	Other City/ Town	Rural (<1,500 population)	Micro	Small	Medium
Make Calls	92	90	92	90	96	92	95	*	90	93	91	91	91	96	98
Receive Calls	94	93	96	100	98	100	89	*	100	94	93	97	94	96	98
Keep it for Broadband Function Only	3	5	4	0	2	0	0	*	0	2	6	2	4	1	2
Security	13	14	7	15	13	19	17	*	21	11	14	16	13	15	17
Alarm Monitoring System	23	23	22	36	24	24	20	*	23	23	24	21	21	32	34

Q.19 What do you and other employees in your business use your landline telephone service for?

Base: 473

With increased switching in recent years, landline subscriptions are more spread among different providers. Non-traditional providers have a stronger market share of bundled subscriptions than non-bundled.

Main Landline Providers



Q.5 What company do you currently use as your main provider for your landline telephone service ?

Base: 473

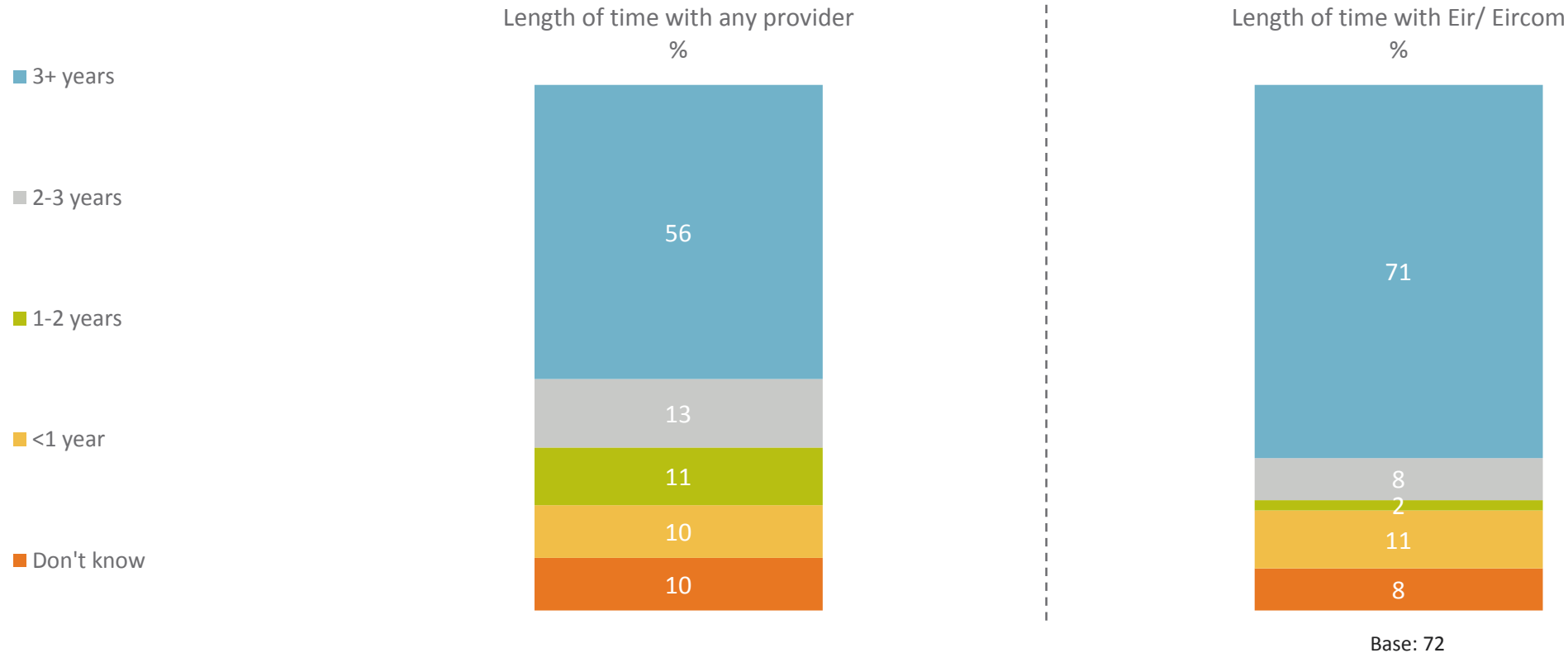
28



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The majority of landline users have been with their current provider for more than three years. 1 in 10 joined their provider within the past year.

Landline - Length of Time with Provider



Q.23 How long have you had your landline telephone service for?

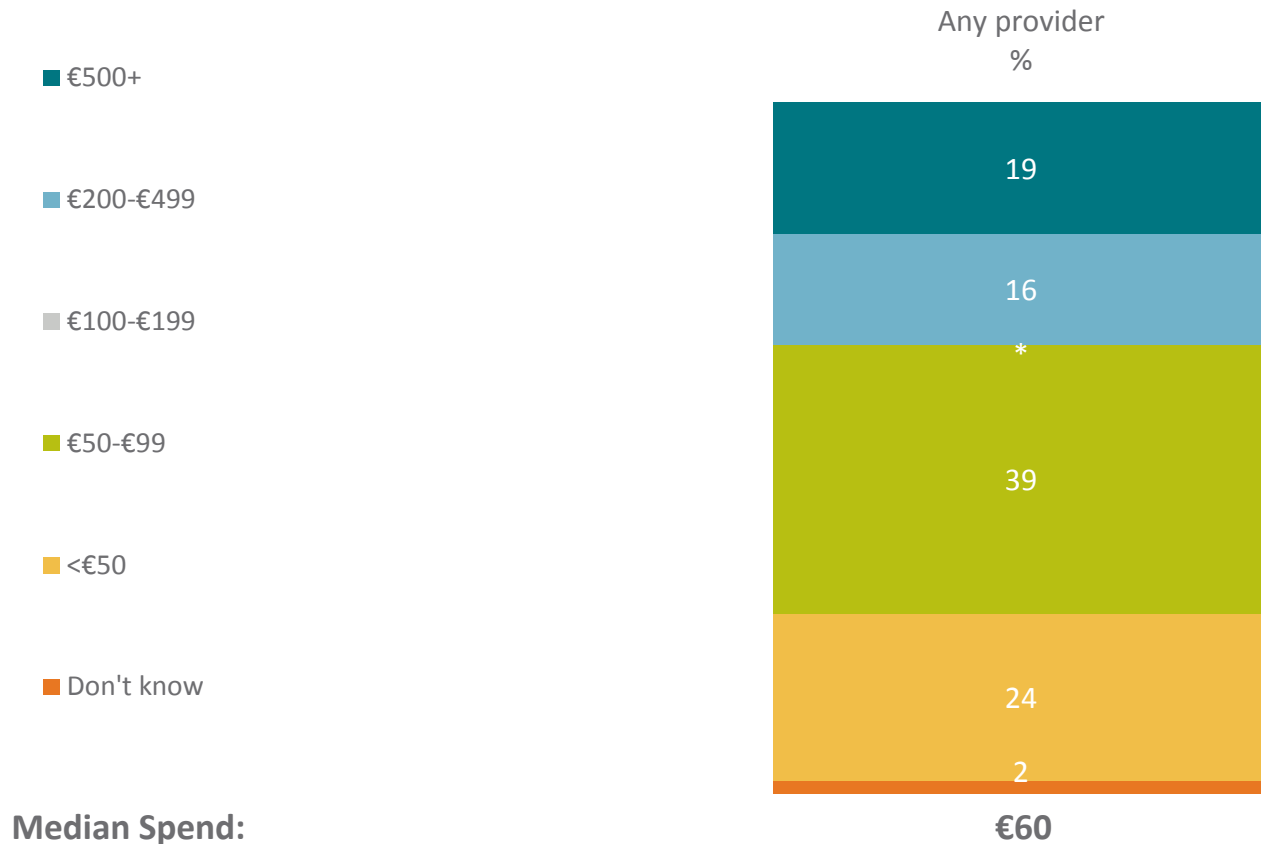
Base: 172 (non-bundled)

*Other Providers not shown due to small base sizes (<50).



While a quarter of landline users spend €60 per month on their landline services, almost 1 in 5 spend €500 or more each month.

Landline – Monthly Spend



Q.21 How much do you pay per month for this service? Please include overall total including line rental.

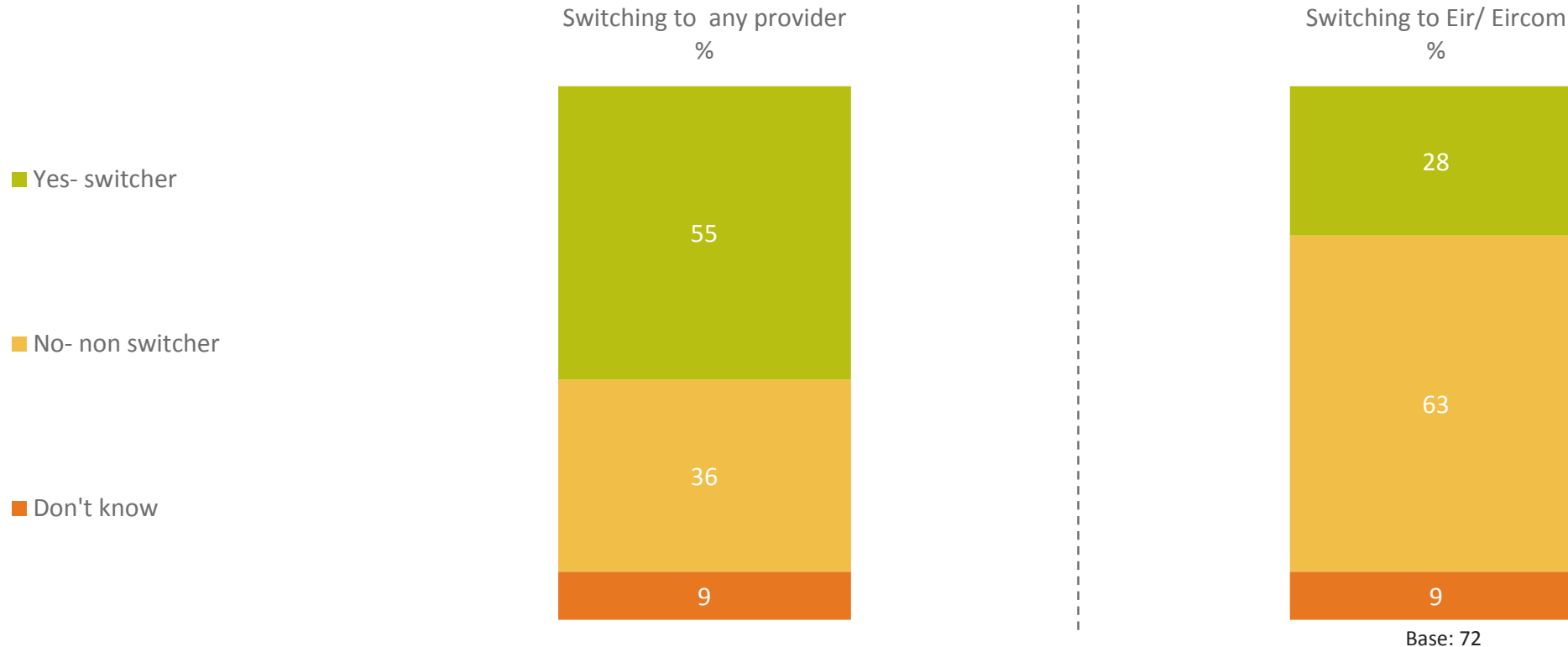
Base: 116 (non-bundled)

*Other Providers not shown due to small base sizes (<50).



Just over half of all landline users have switched providers at some stage. As the incumbent provider, a lower proportion of its customer base switched to the provider.

Landline – Incidence of Switching Provider



Q.24 Have you previously purchased this service from other service provider(s)?

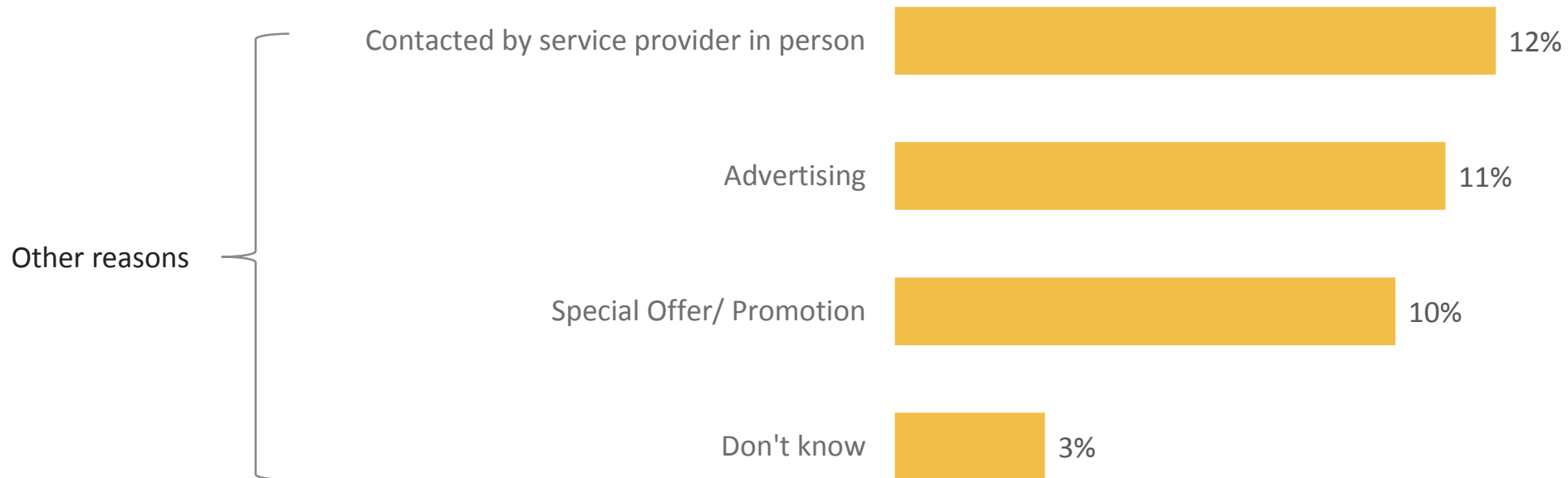
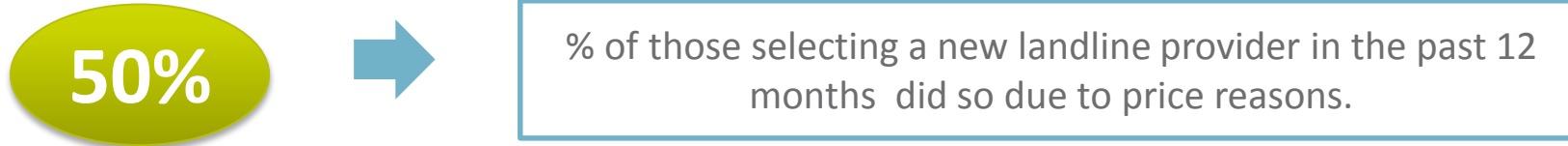
Base: 172 (non-bundled)

*Other Providers not shown due to small base sizes (<50).

Half of those switching landline provider did so for price reasons

Landline –Reasons for Selecting Provider

**Caution, small base size*

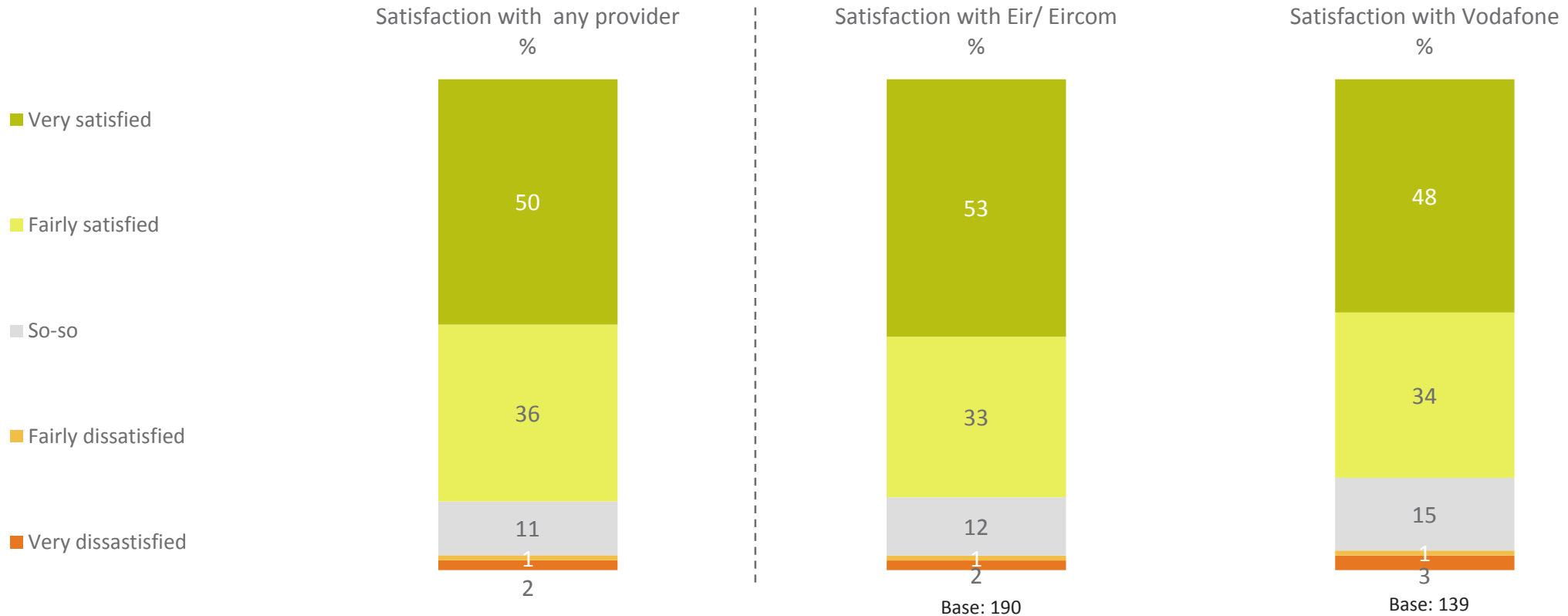


Q.24b What prompted you to select this provider within the past year

Base: 24 (non-bundled)

Half of those using landlines are satisfied with their service. This is consistent across the two main providers.

Landline – Overall Satisfaction with Provider



*Other Providers not shown due to small base sizes (<50).

Q.20a Out of 10 where 1 is very dissatisfied and 10 is very satisfied how satisfied are you with your landline telephone service?

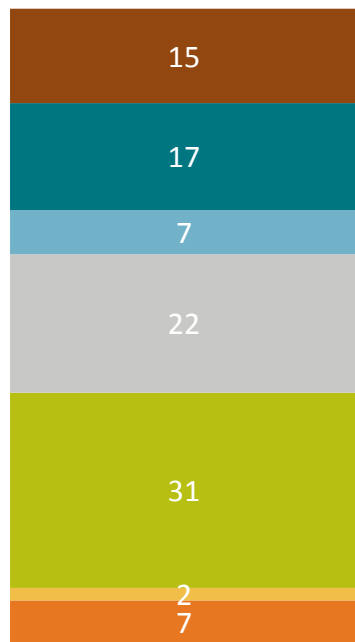
Base: 473

Roughly a third of landline users intend to switch provider in the next 12 months. Intention to switch from Eir is lower than it is in the market overall.

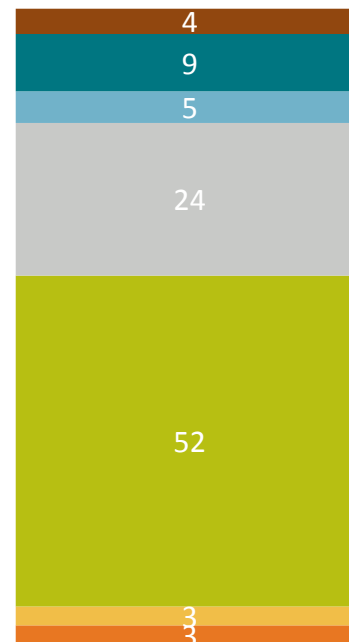
Landline –Likelihood to Switch Provider in the Next 12 Months

- Very likely
- Quite likely
- Neither likely nor unlikely
- Not very likely
- Not at all likely
- Currently tied in a contract and not able to switch
- Don't know

Switching from any provider
%



Switching from Eir/ Eircom
%



Base: 72

*Other Providers not shown due to small base sizes (<50).

Q.29 How likely are you to consider switching landline telephone service supplier within the next 12 months?

Base: 172 (non-bundled)



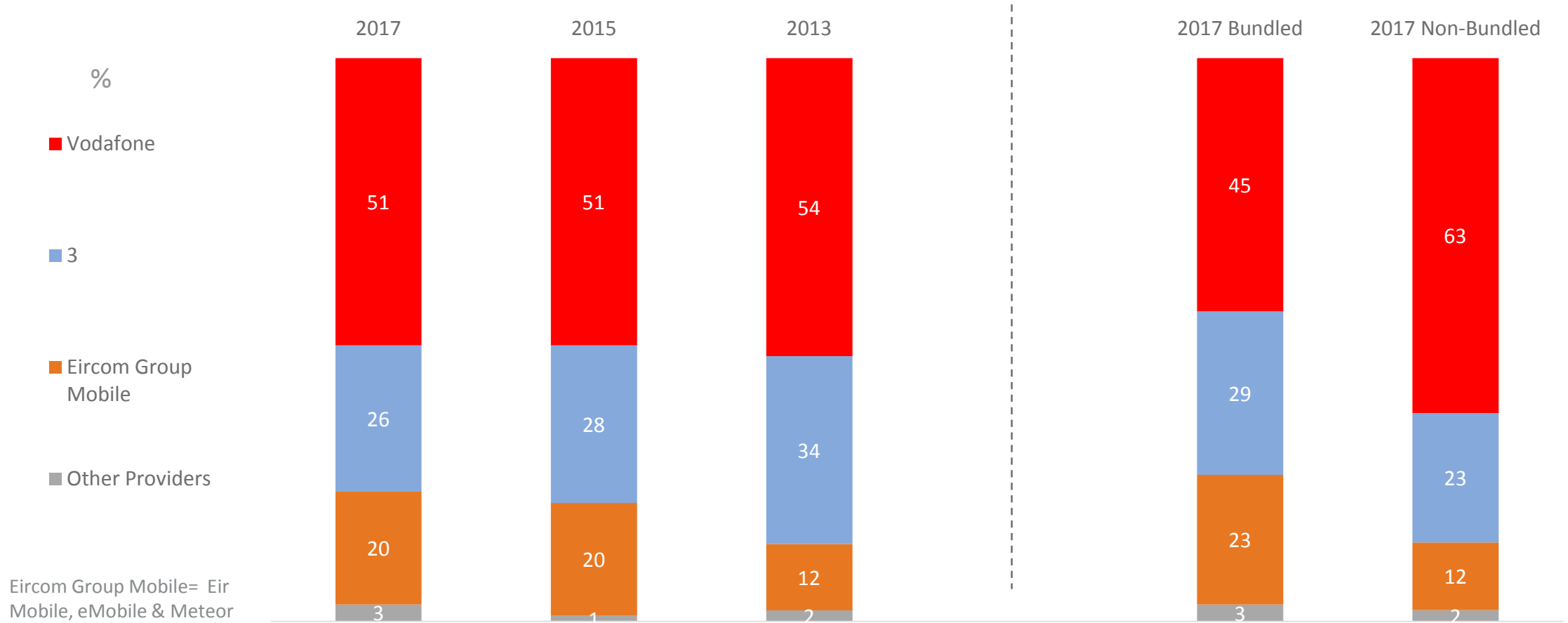
Mobile Usage



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Market shares in the mobile market remain broadly unchanged since 2015.

Main Mobile Phone Providers



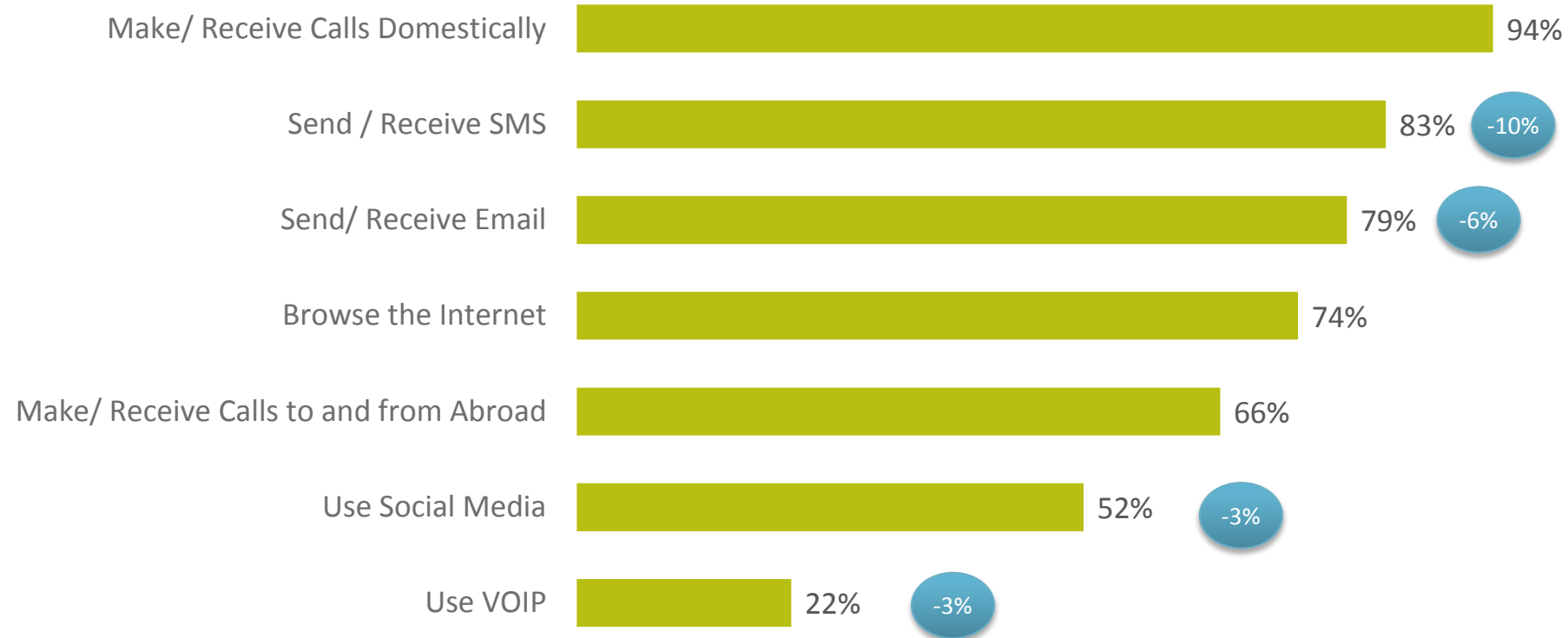
Q.6a What company do you currently use as your main mobile phone provider?

Base: 409



Mobile phone services are most used for making and receiving calls, as well as for sending and receiving SMS. However, there has been a notable decline in usage of SMS services since 2015.

Mobile Phone Services Usage



Q.30 What do you and other employees use your business mobile telephone(s) for?

Base: 409

Mobile Phone Services Usage

%	Sector									Region			Business Size		
	Total	Service (Utilities/ Professional)	Retail	** Wholesale	** Construction	Manufact.	** Health/ Education	*Govt./ Social Service	**Agri./ Forestry/ Fishing	DCLG city/ suburban	Other City/ Town	Rural (<1,500 population)	Micro	Small	Medium
Make/ Receive Calls Domestically	94	91	95	95	98	94	*	*	95	96	93	90	93	96	100
Make/ Receive Calls to and from Abroad	66	64	62	75	72	72	*	*	72	64	64	71	66	59	77
Send / Receive SMS	83	81	78	87	91	85	*	*	88	84	80	88	83	87	90
Browse the Internet	74	70	81	88	81	88	*	*	80	76	77	65	74	74	81
Send/ Receive Email	79	74	79	90	79	91	*	*	83	81	77	79	77	86	92
Use Social Media	52	44	62	59	50	56	*	*	59	52	52	56	51	56	45
Use VOIP	22	18	22	30	19	33	*	*	32	23	19	22	21	26	38

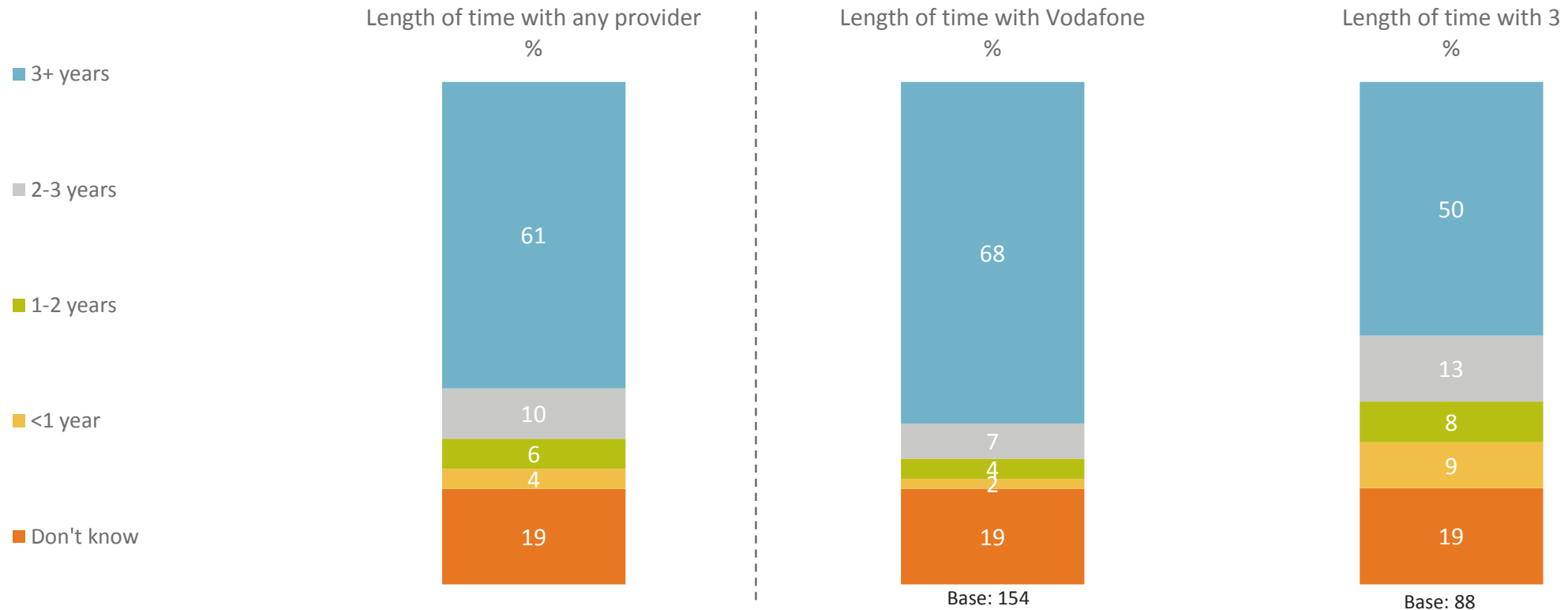
Q.30 What do you and other employees use your business mobile telephone(s) for??

Base: 409

38

61% of SMEs have been with their mobile phone provider for more than three years. Length of relationship is slightly higher among customers of the incumbent provider.

Mobile Phone- Length of Time with Provider



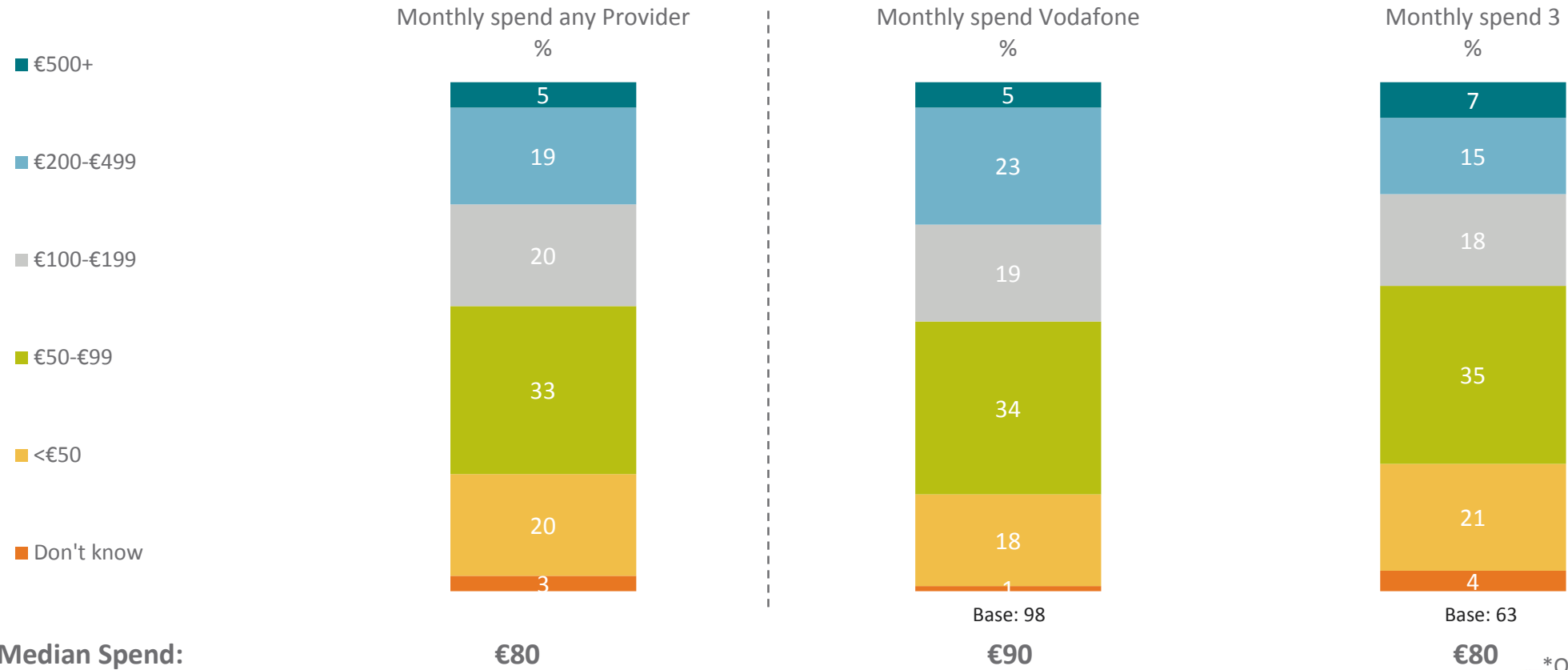
*Other Providers not shown due to small base sizes (<50).

Q.39a How long has your business had your main mobile phone service with your provider?

Base: 294 (non-bundled)

The median monthly spend on mobile phone services among SMEs is €80.

Mobile Phone – Monthly spend

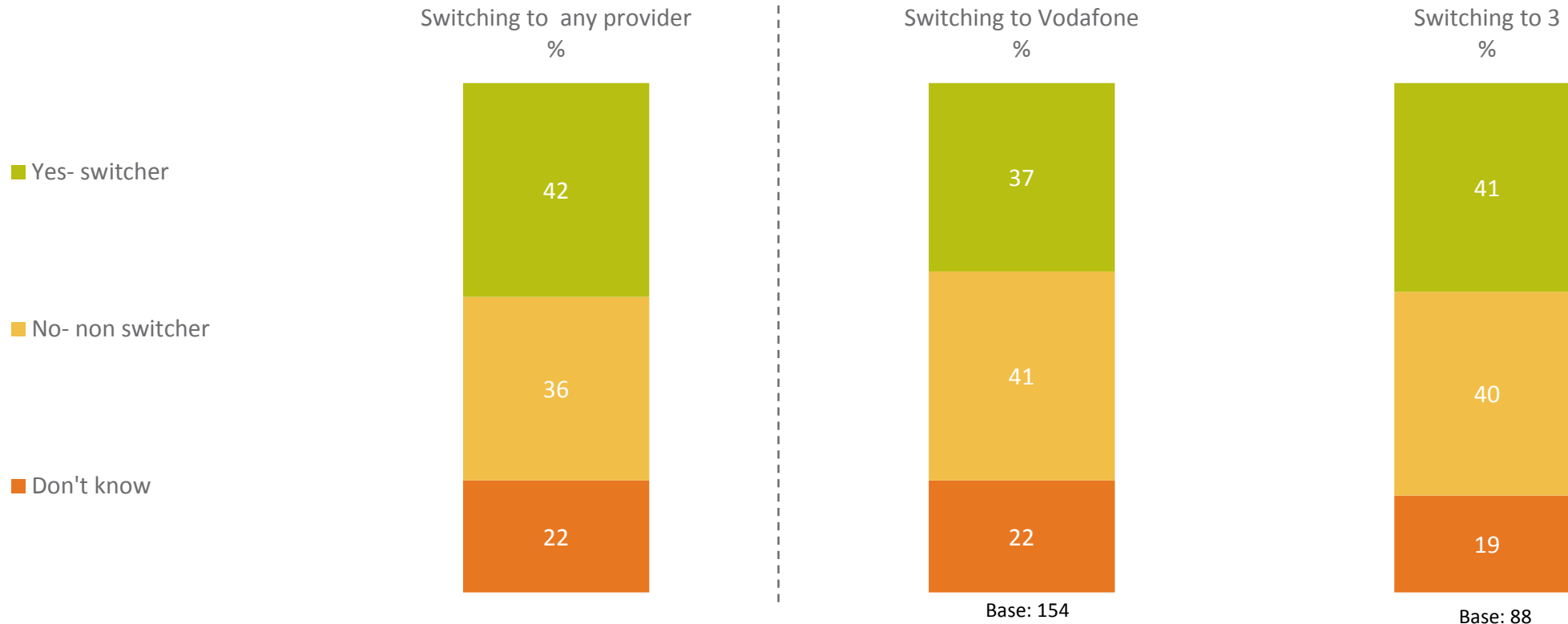


Q.50b How much do you pay per month for this service?

Base: 196 (non-bundled)

42% of SMEs have switched mobile provider at some point

Mobile Phone– Incidence of Switching Provider



Q.39b Have you previously purchased this service from other provider(s)?

Base: 294 (non-bundled)

41

*Other Providers not shown due to small base sizes (<50).



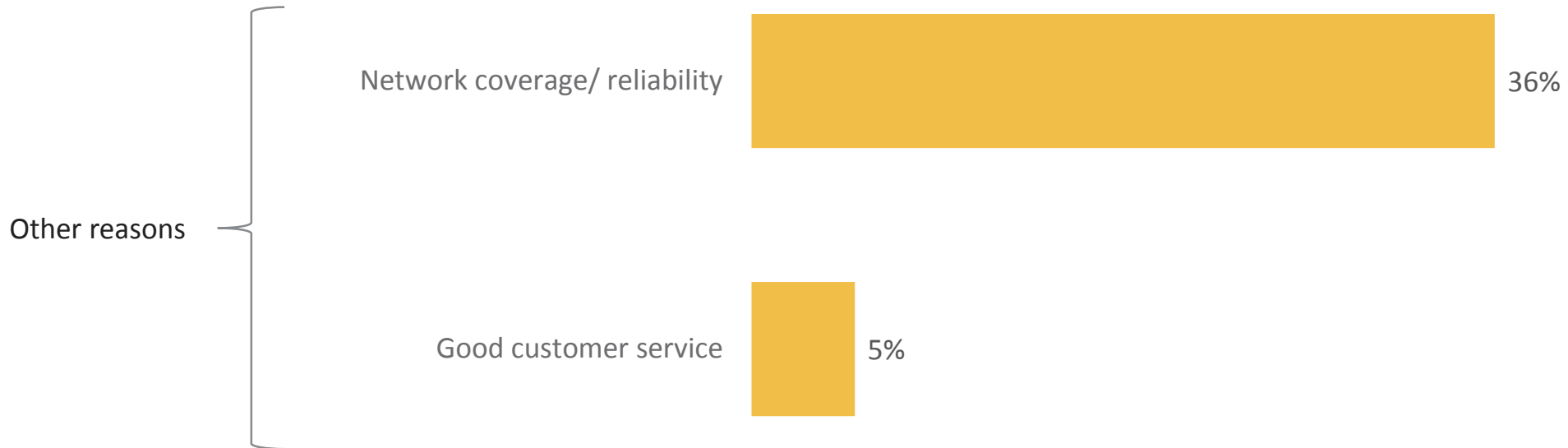
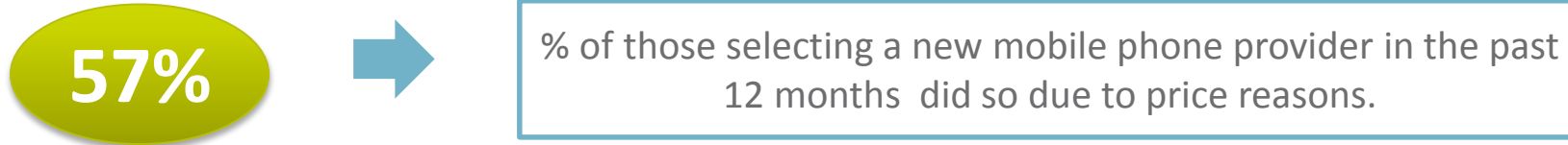
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The majority of those that switched mobile phone provider in the past 12 months did so for price reasons.

Mobile Phone– Reasons for Selecting Provider

**Caution, small base size*

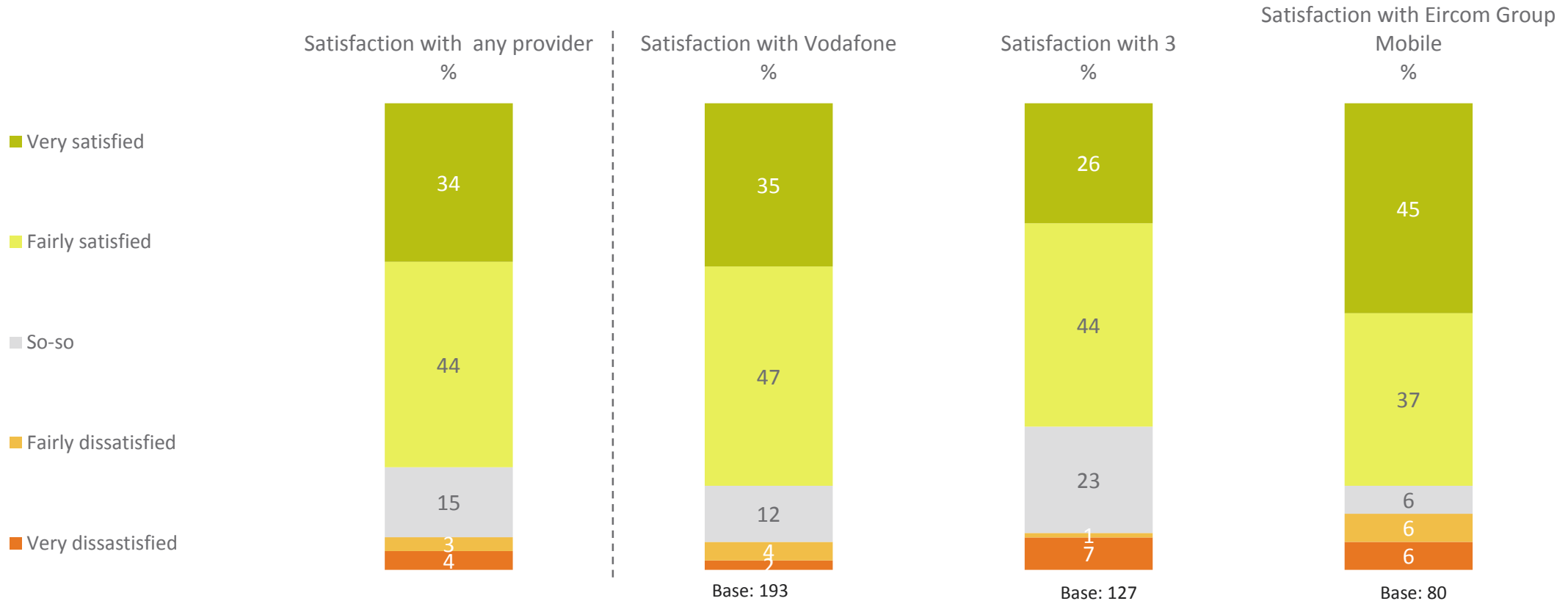


Q.40 What prompted you to select your provider within the past year?

Base: 14 (non-bundled)

Almost 4 out of 5 SMEs are satisfied with the service they receive. Satisfaction with 3 is lower than the market average, however relatively few customers are dissatisfied.

Mobile Phone – Overall Satisfaction with Provider



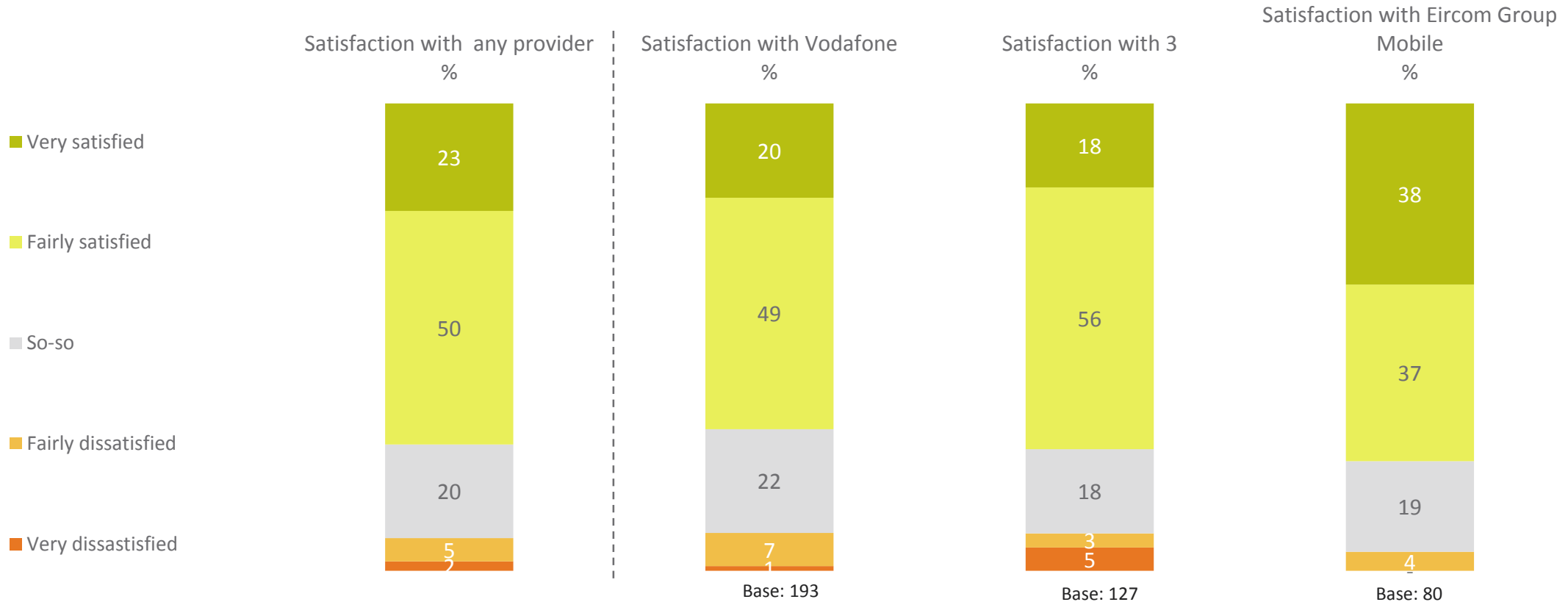
Q.38 Out of 10 where 1 is very dissatisfied and 10 is very satisfied how satisfied are you with the overall service provided by your main mobile phone service provider?

Base: 409

*Other Providers not shown due to small base sizes (<50).

While satisfaction rates with cost are lower than overall satisfaction, dissatisfaction with this factor remains relatively low.

Mobile Phone – Satisfaction with Cost



Q.38b Out of 10, where 1 is very dissatisfied and 10 is very satisfied, how satisfied are you with the following aspects of service you receive from your mobile phone supplier?*Cost.

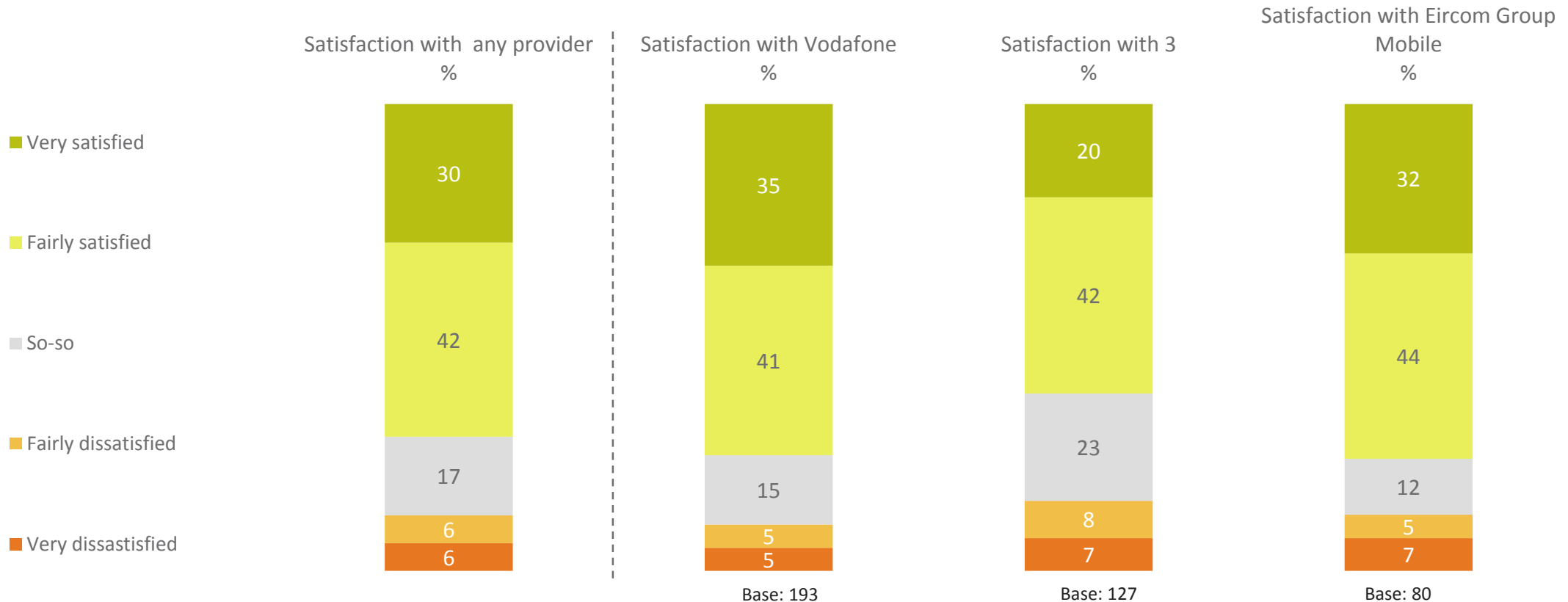
Base: 409

44

*Other Providers not shown due to small base sizes (<50).

Almost three-quarters are satisfied with the coverage/reliability from their mobile provider, however satisfaction levels among 3 customers is lower than the market overall.

Mobile Phone – Satisfaction with Coverage/Reliability



Q.38b Out of 10, where 1 is very dissatisfied and 10 is very satisfied, how satisfied are you with the following aspects of service you receive from your mobile phone supplier?* Coverage/ Reliability.

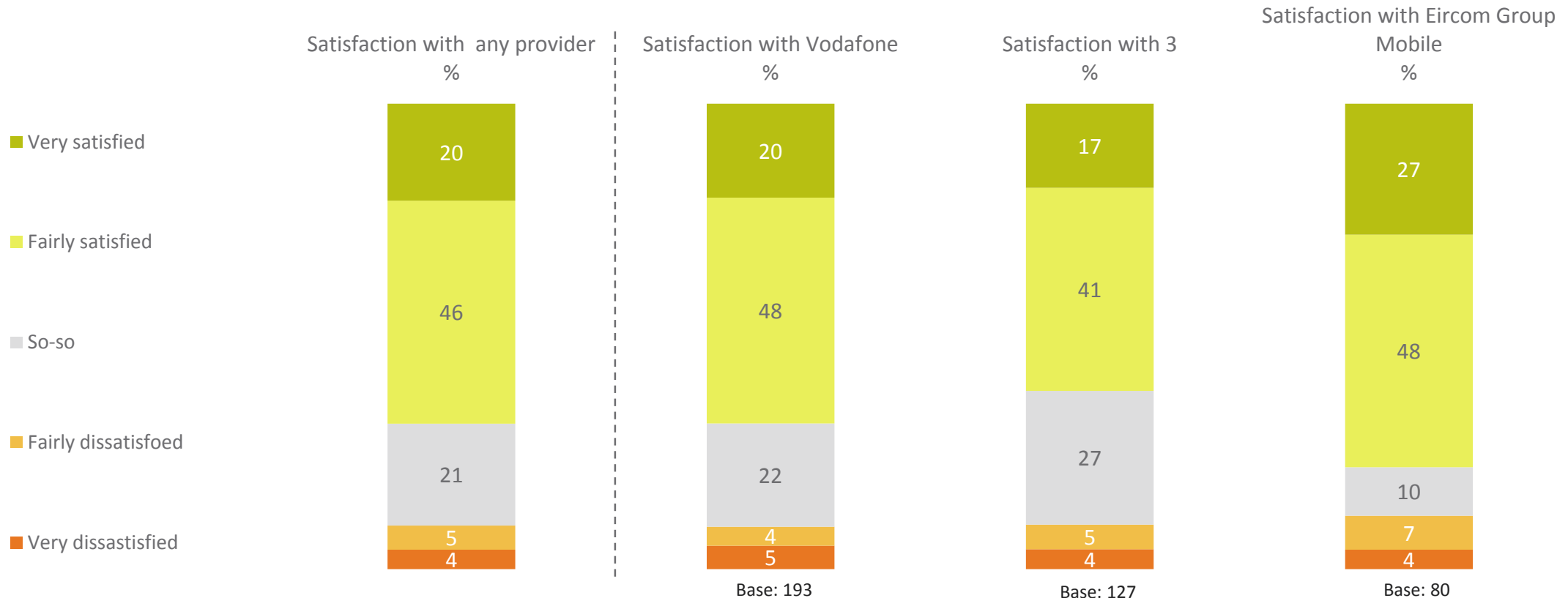
Base: 409

45

*Other Providers not shown due to small base sizes (<50).

While satisfaction levels with download speeds are lower than for network coverage, dissatisfaction levels remain low.

Mobile Phone – Satisfaction with Download Speed



Q.38b Out of 10, where 1 is very dissatisfied and 10 is very satisfied, how satisfied are you with the following aspects of service you receive from your mobile phone supplier?* Actual Download Speed Experienced.

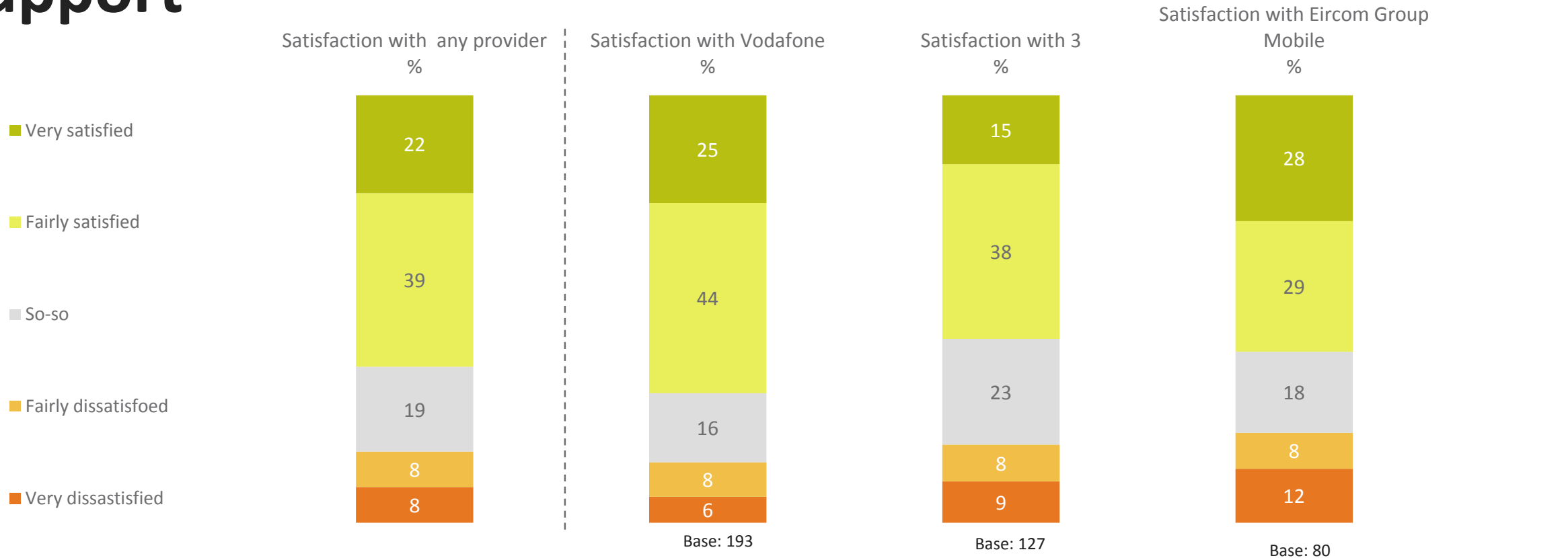
Base: 409

46

*Other Providers not shown due to small base sizes (<50).

Dissatisfaction levels with Customer/Technical Support are higher than those for other service attributes, although remain at relatively low levels.

Mobile Phone – Satisfaction with Customer/ Technical Support



Q.38b Out of 10, where 1 is very dissatisfied and 10 is very satisfied, how satisfied are you with the following aspects of service you receive from your mobile phone supplier?* Customer/ Technical Support.

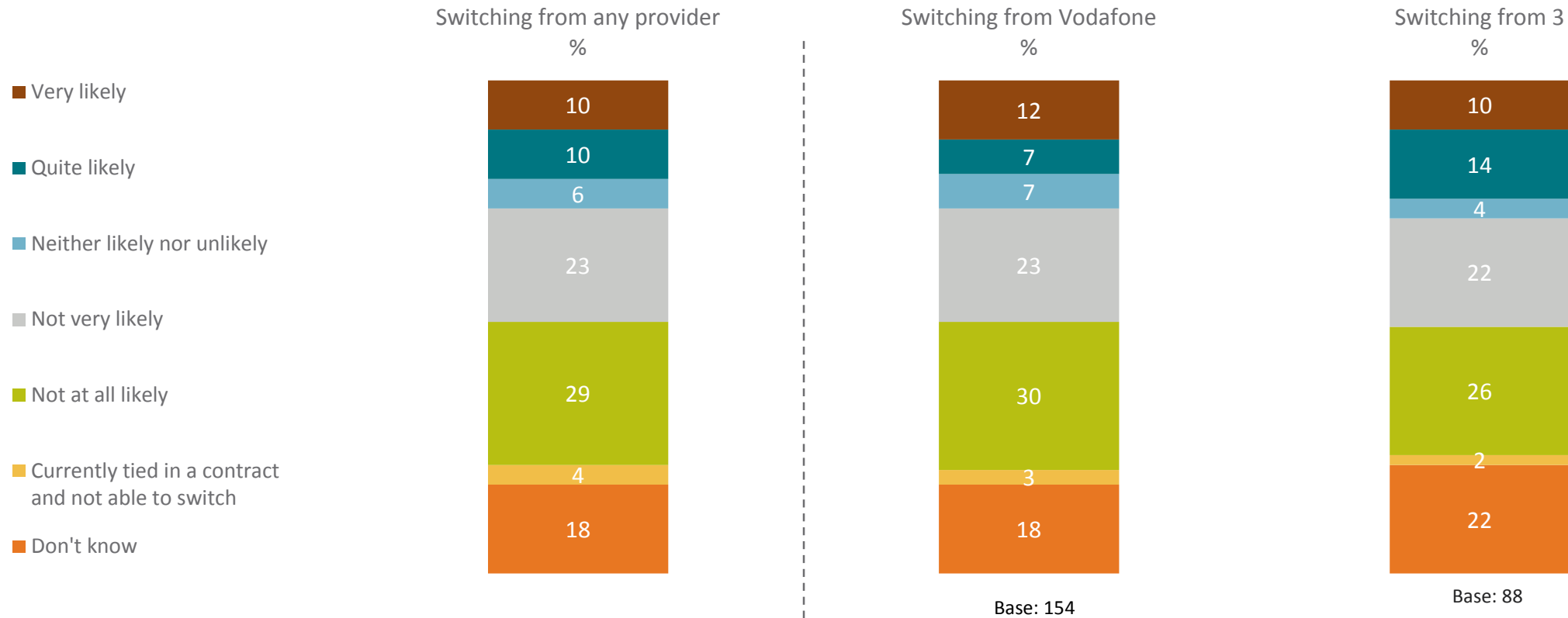
Base: 409

47

*Other Providers not shown due to small base sizes (<50).

1 out of 5 SMEs suggest that they are likely to switch mobile phone provider in the next 12 months

Mobile Phone –Likelihood to Switch Provider in the Next 12 Months



Q.45 How likely are you to consider switching mobile phone service provider within the next 12 months?

Base: 294 (non-bundled)



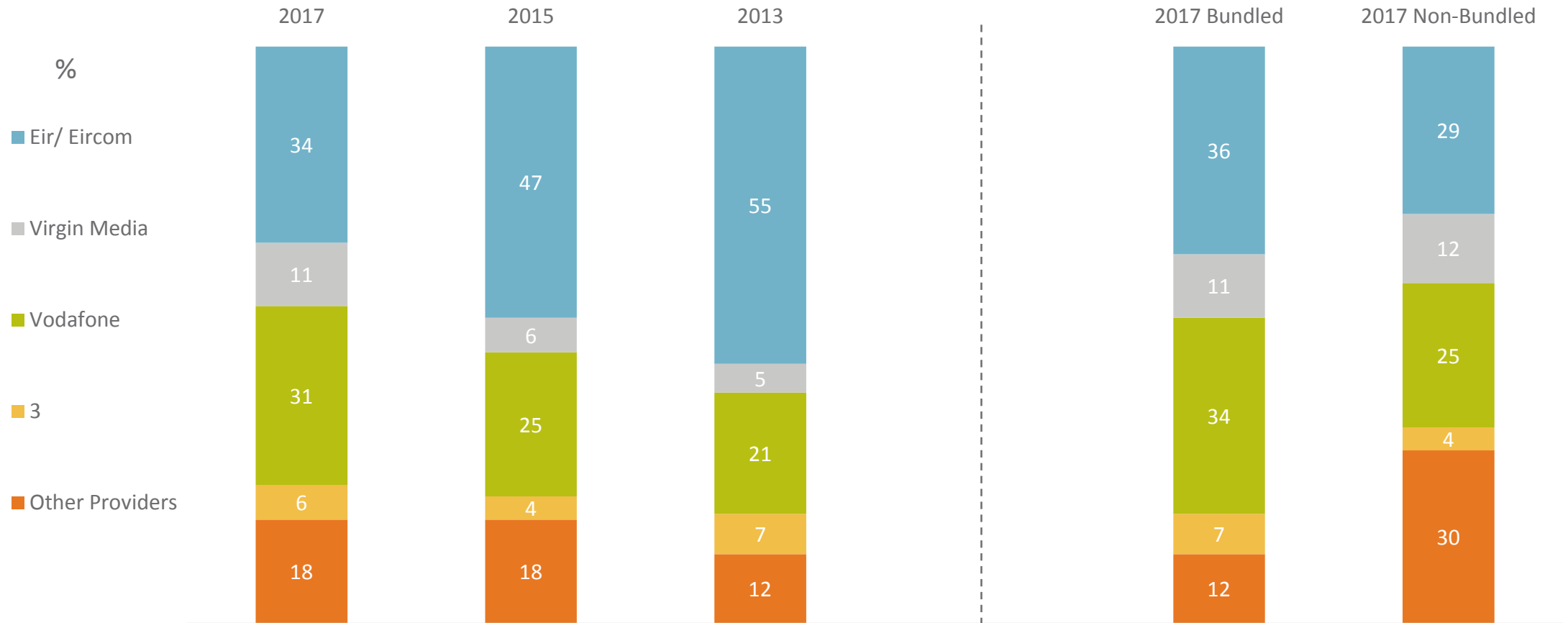
Fixed Broadband Usage



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Communications Regulation

In line with changes in the fixed landline market, the fixed broadband market has become more diversified over the past few years.

Main Fixed Broadband Providers



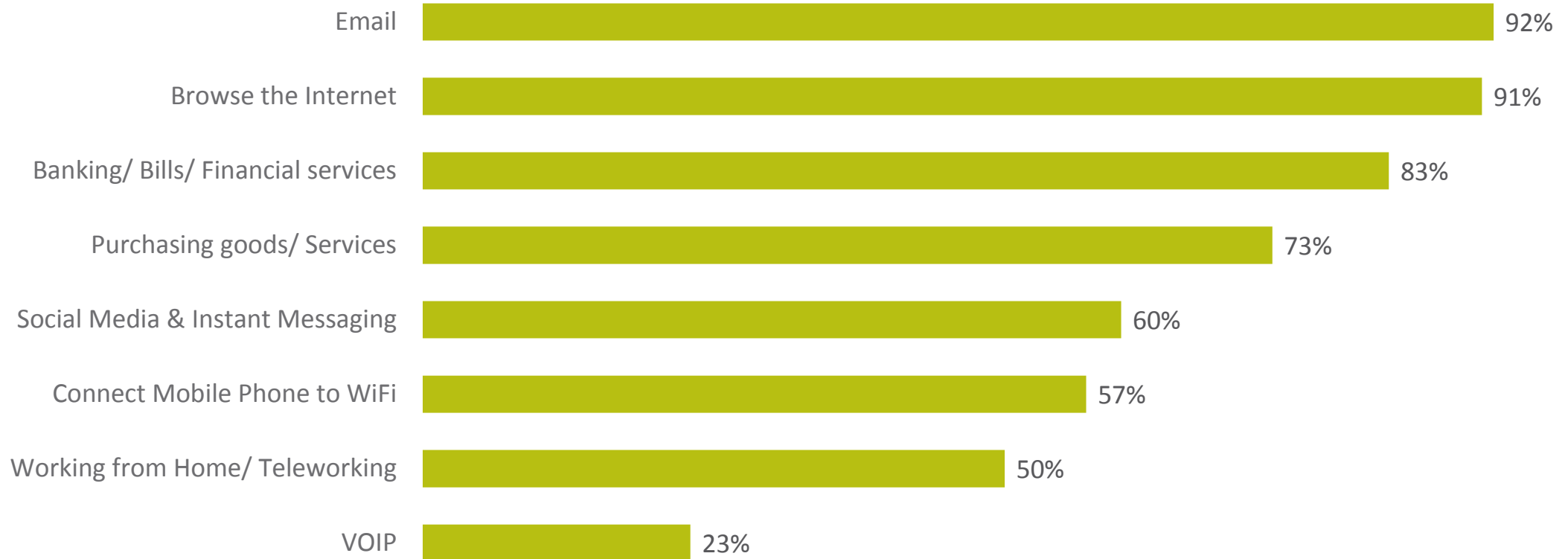
Q.8 What company do you currently use as your main fixed broadband provider (landline/cable or wireless)?

Base: 479



Fixed broadband services are primarily used for emailing and browsing the internet. However, the range of services used is diverse in many respects.

Fixed Broadband Services Usage



Q.52 What do you and other people in your business use your fixed broadband service for?

Base: 479

Fixed Broadband Services Usage

%	Sector									Region			Business Size		
	Total	Service (Utilities/ Professional)	Retail	** Wholesale	** Construction	Manufact.	** Health/ Education	*Govt./ Social Service	**Agri./ Forestry/ Fishing	DCLG city/ suburban	Other City/ Town	Rural (<1,500 population)	Micro	Small	Medium
Browse the Internet	91	90	87	95	97	85	96	*	92	92	91	87	91	90	86
Connect Mobile Phone to Wifi	57	56	57	75	54	72	41	*	77	62	53	46	56	63	54
Email	92	91	93	96	93	96	85	*	100	93	92	88	92	90	93
VOIP	23	25	15	29	36	28	15	*	47	30	12	18	21	29	38
Purchasing goods/ Services	73	70	73	90	72	86	69	*	73	73	69	79	74	69	67
Banking/ Bills/ Financial services	83	85	77	87	84	99	73	*	83	87	81	74	83	81	88
Social Media & Instant Messaging	60	55	68	51	66	50	66	*	63	64	54	60	59	64	52
Working from Home/ Teleworking	50	51	46	57	64	57	39	*	74	48	52	51	52	42	56

Q.52 What do you and other people in your business use your fixed broadband service for?

Base: 479

52

* = base size too small

** = caution, base size <50

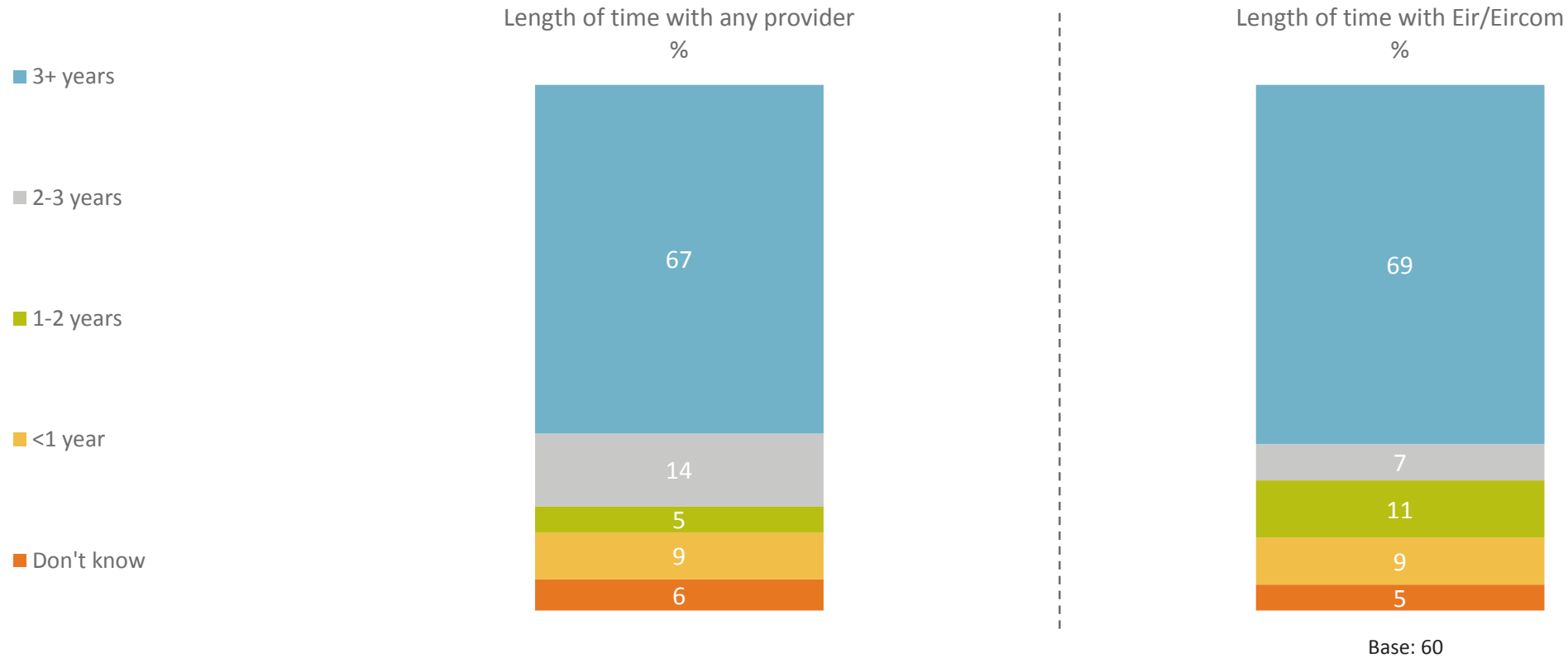


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Two-thirds have been with their broadband provider for 3 or more years.

Fixed Broadband- Length of Time with Provider



Q.57a How long have you had your fixed broadband service with this provider?

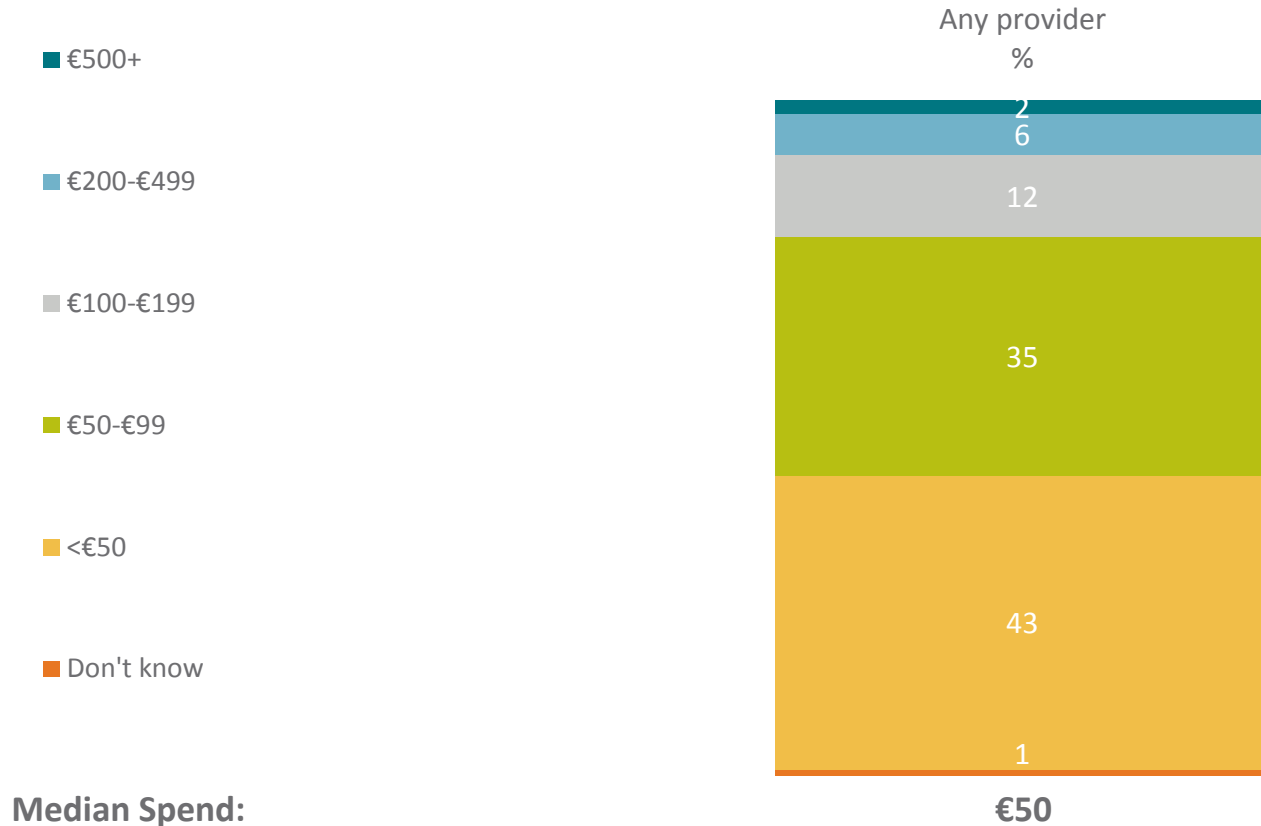
Base: 179 (non-bundled)

*Other Providers not shown due to small base sizes (<50).



Median monthly spend on broadband services among SMEs is €50.

Fixed Broadband– Monthly Spend



Q.50b How much do you pay per month for this service?

Base: 108 (non-bundled)

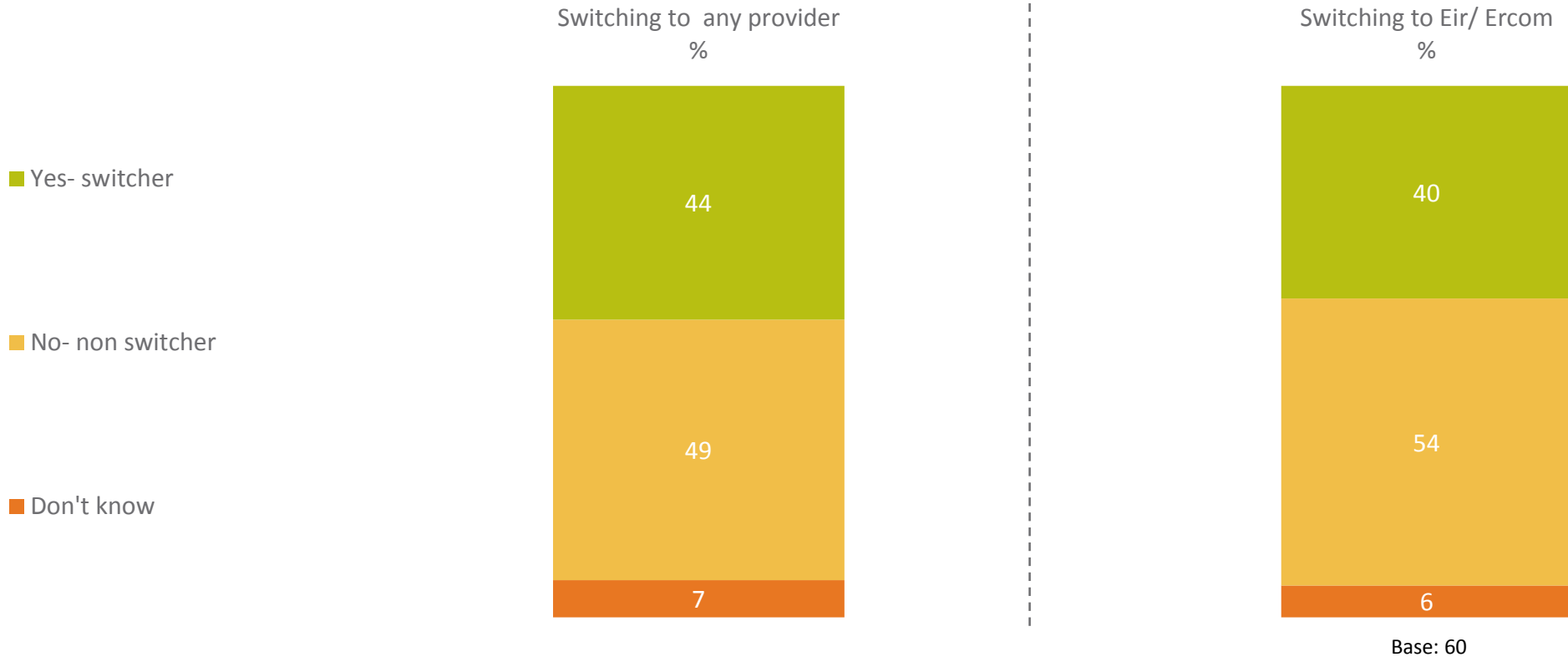
*Other Providers not shown due to small base sizes (<50).



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44% of SMEs have switched their broadband service at some stage in the past.

Fixed Broadband– Incidence of Switching Provider



Q.57b Have you previously purchased this service from other provider(s)?

Base: 179 (non-bundled)

*Other Providers not shown due to small base sizes (<50).



Half of those that switched broadband provider in the past year did so due to a promised broadband speed
(N.B. Small sample size)

Fixed Broadband –Reasons for Selecting Provider

**Caution, small base size*

45%



% of those selecting a new fixed broadband provider in the past 12 months did so due to the promised speed of broadband.

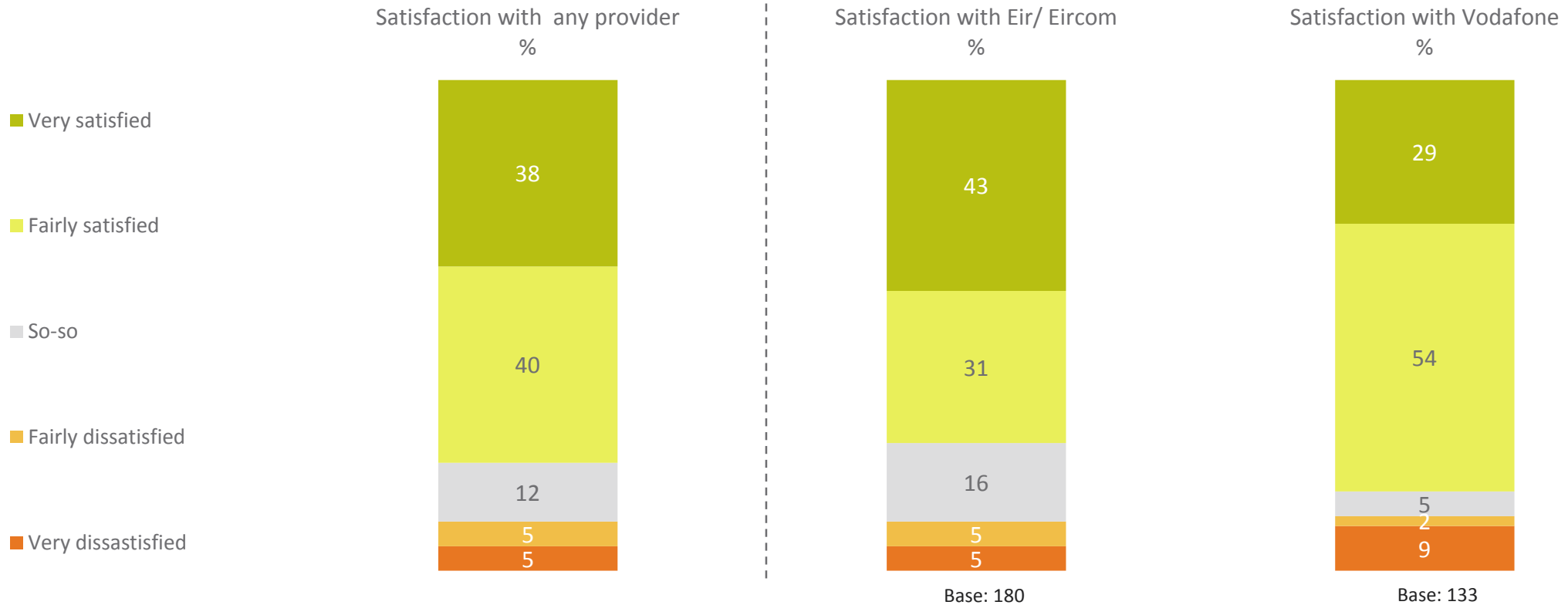


Q.58 Why did you select this provider within the past year?

Base: 13 (non-bundled)

Over three-quarters are at least somewhat satisfied with their broadband provider. Overall satisfaction levels are slightly higher for Vodafone, although the proportion very satisfied is higher for Eir.

Fixed Broadband– Overall Satisfaction with Provider



Q.56a Out of 10 where 1 is very dissatisfied and 10 is very satisfied how satisfied are you with your fixed broadband supplier?

Base: 479

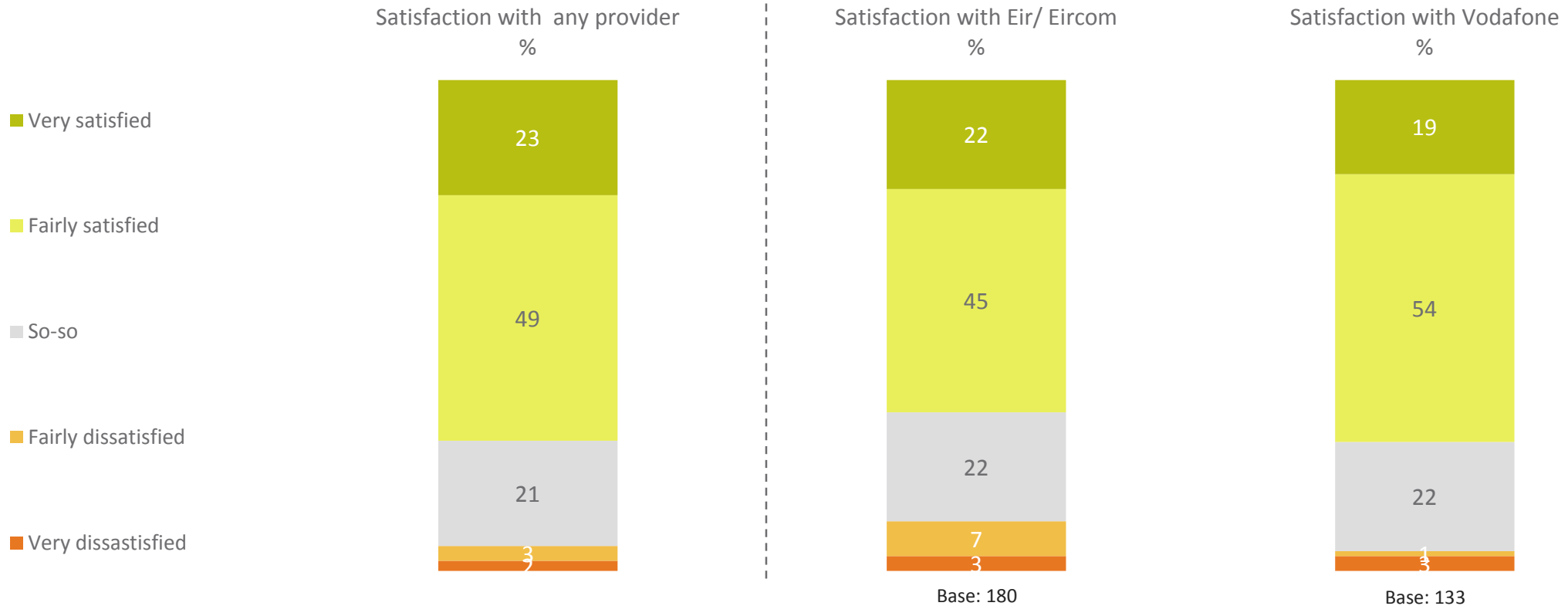
*Other Providers not shown due to small base sizes (<50).



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Just under a quarter of SMEs are satisfied with the cost of their broadband service. Overall satisfaction is slightly higher for Vodafone customers.

Fixed Broadband– Satisfaction with Cost



Q.56b Out of 10, where 1 is very dissatisfied and 10 is very satisfied, how satisfied are you with the following aspects of service you receive from this supplier?*Cost?

Base: 479

58

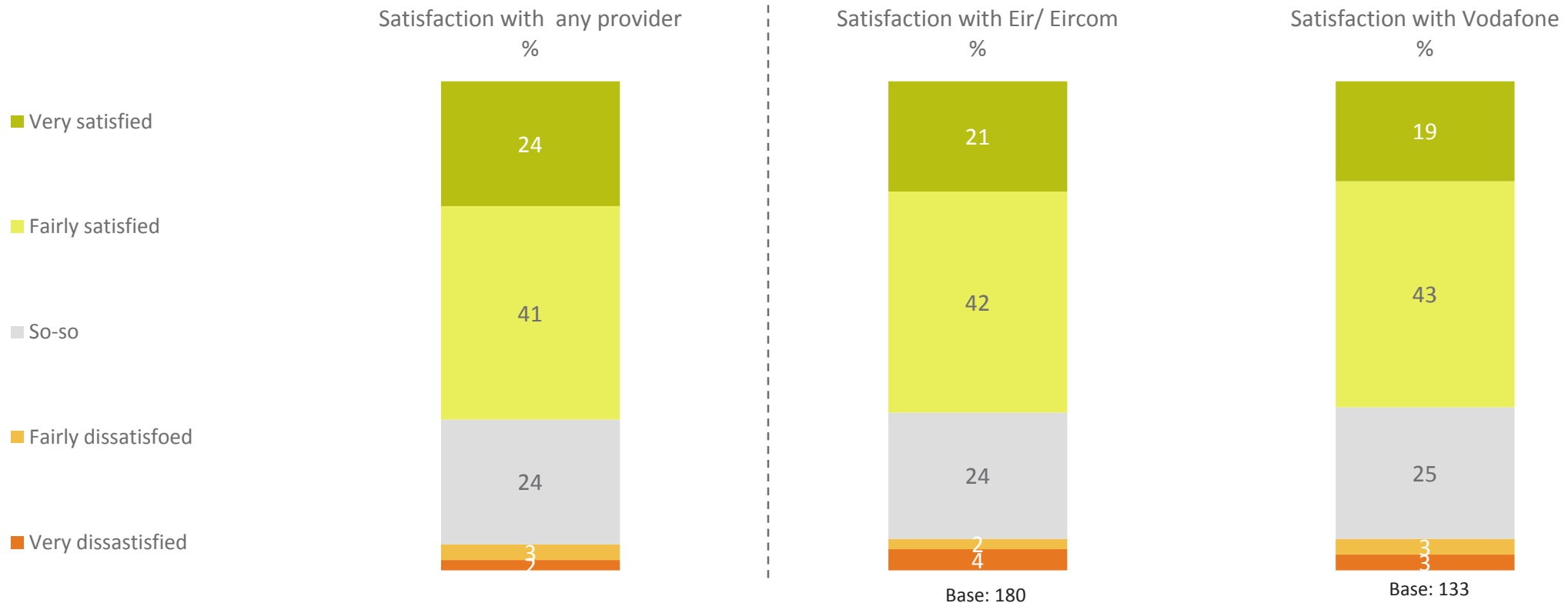
*Other Providers not shown due to small base sizes (<50).



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Two-thirds are satisfied with the length of their broadband contract.

Fixed Broadband – Satisfaction with Length of Contract



Q.56b Out of 10, where 1 is very dissatisfied and 10 is very satisfied, how satisfied are you with the following aspects of service you receive from this supplier? *Length of contract.

Base: 479

59

*Other Providers not shown due to small base sizes (<50).

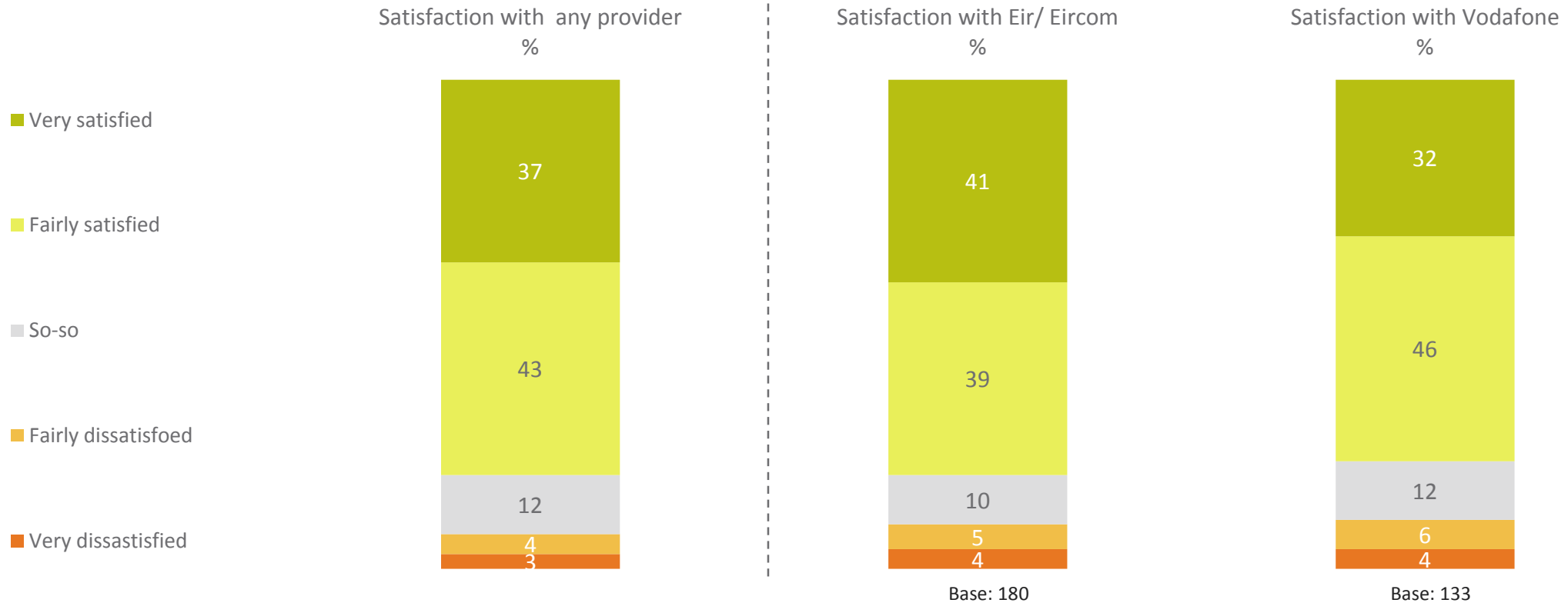


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Four out of five SMEs are satisfied with the reliability of their broadband service.

Fixed Broadband– Satisfaction with Reliability



Q.56b Out of 10, where 1 is very dissatisfied and 10 is very satisfied, how satisfied are you with the following aspects of service you receive from this supplier?*Reliability.

Base: 479

60

*Other Providers not shown due to small base sizes (<50).

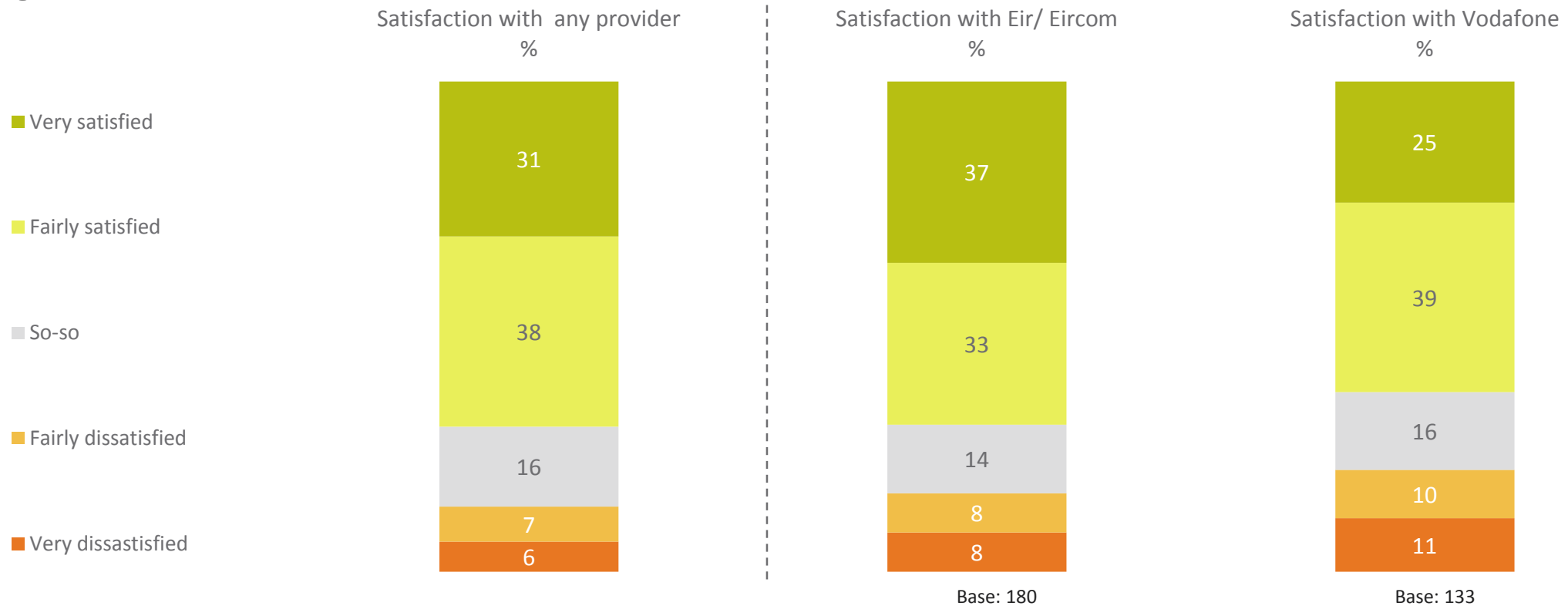


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Just over two-thirds of SMEs are satisfied with the actual speed experienced on their broadband service.

Fixed Broadband – Satisfaction with Actual Speed Experienced



Q.56b Out of 10, where 1 is very dissatisfied and 10 is very satisfied, how satisfied are you with the following aspects of service you receive from this supplier?* Actual Speed Experienced.

Base: 479

61

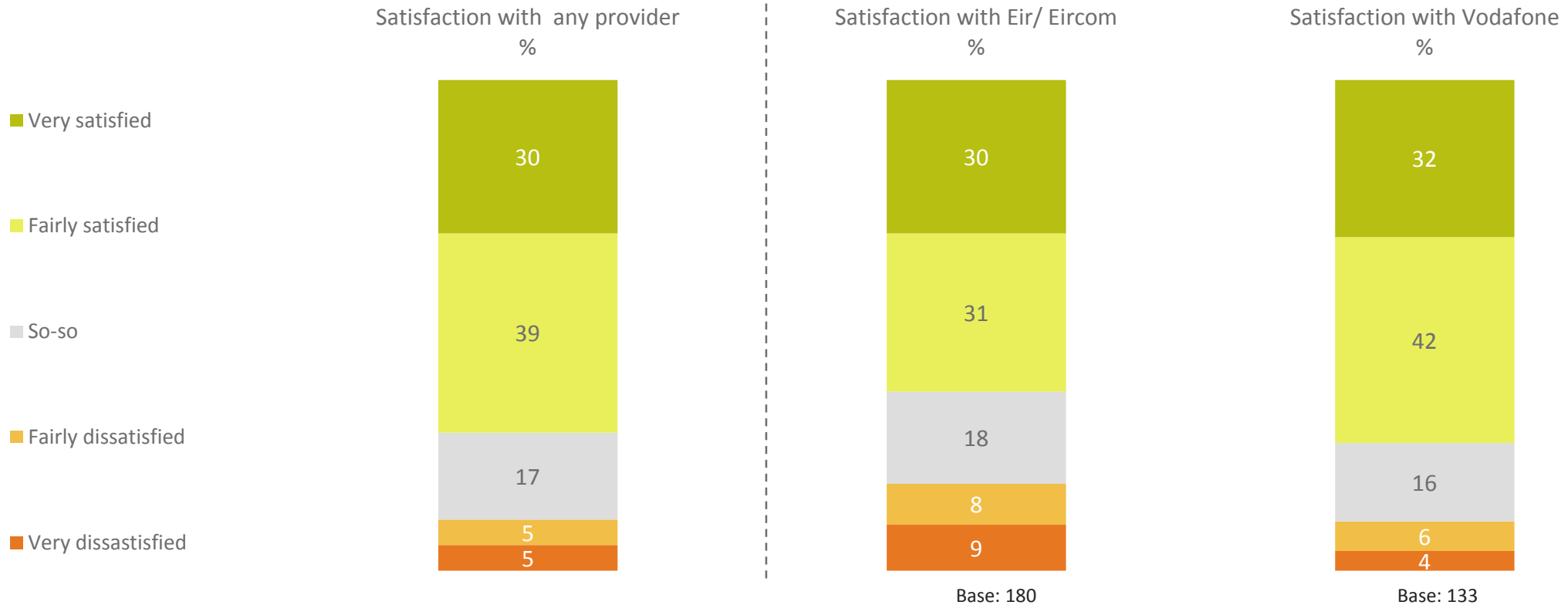
*Other Providers not shown due to small base sizes (<50).



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While over two-thirds of SMEs are satisfied with customer/technical support, satisfaction levels for this service attribute among Eir customers are slightly lower.

Fixed Broadband – Satisfaction with Customer/ Technical Support



Q.56b Out of 10, where 1 is very dissatisfied and 10 is very satisfied, how satisfied are you with the following aspects of service you receive from this supplier? * Customer/ Technical Support.

Base: 479

*Other Providers not shown due to small base sizes (<50).

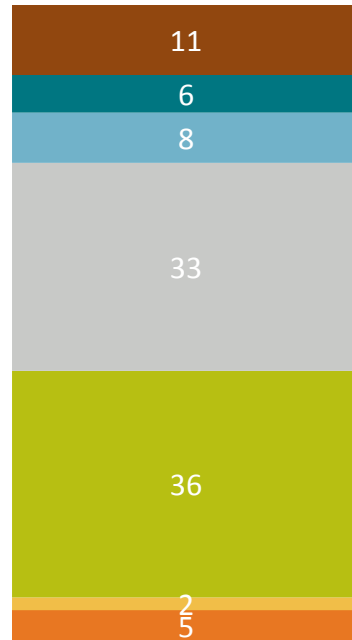


1 in 6 SMEs with broadband say they are likely to switch provider in the next 12 months.

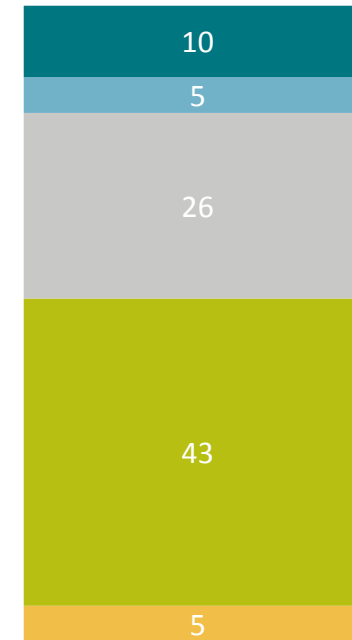
Fixed Broadband – Likelihood to Switch Provider in the Next 12 Months

- Very likely
- Quite likely
- Neither likely nor unlikely
- Not very likely
- Not at all likely
- Currently tied in a contract and not able to switch
- Don't know

Switching from any provider
%



Switching from Eir/ Eircom
%



Base: 60

Q.61 How likely are you to consider switching your fixed broadband supplier within the next 12 months?

Base: 179 (non-bundled)

*Other Providers not shown due to small base sizes (<50).

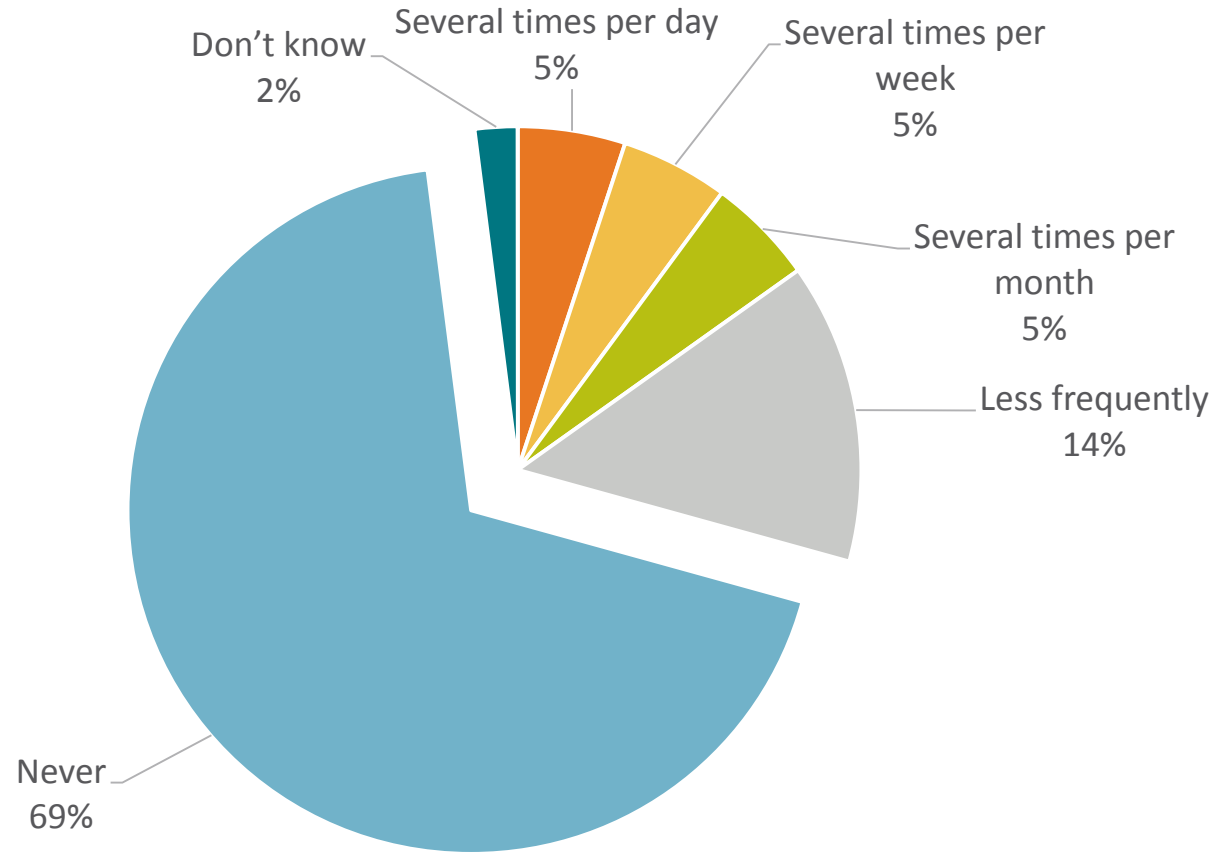


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Over two-thirds of SMEs never use VOIP services. 1 in 10 use it at least once per week.

VOIP Usage



Q.53 How often do you and other employees use voice over broadband service such as Skype/FaceTime/Viber to make a phone call?

Base: 502



VOIP Usage

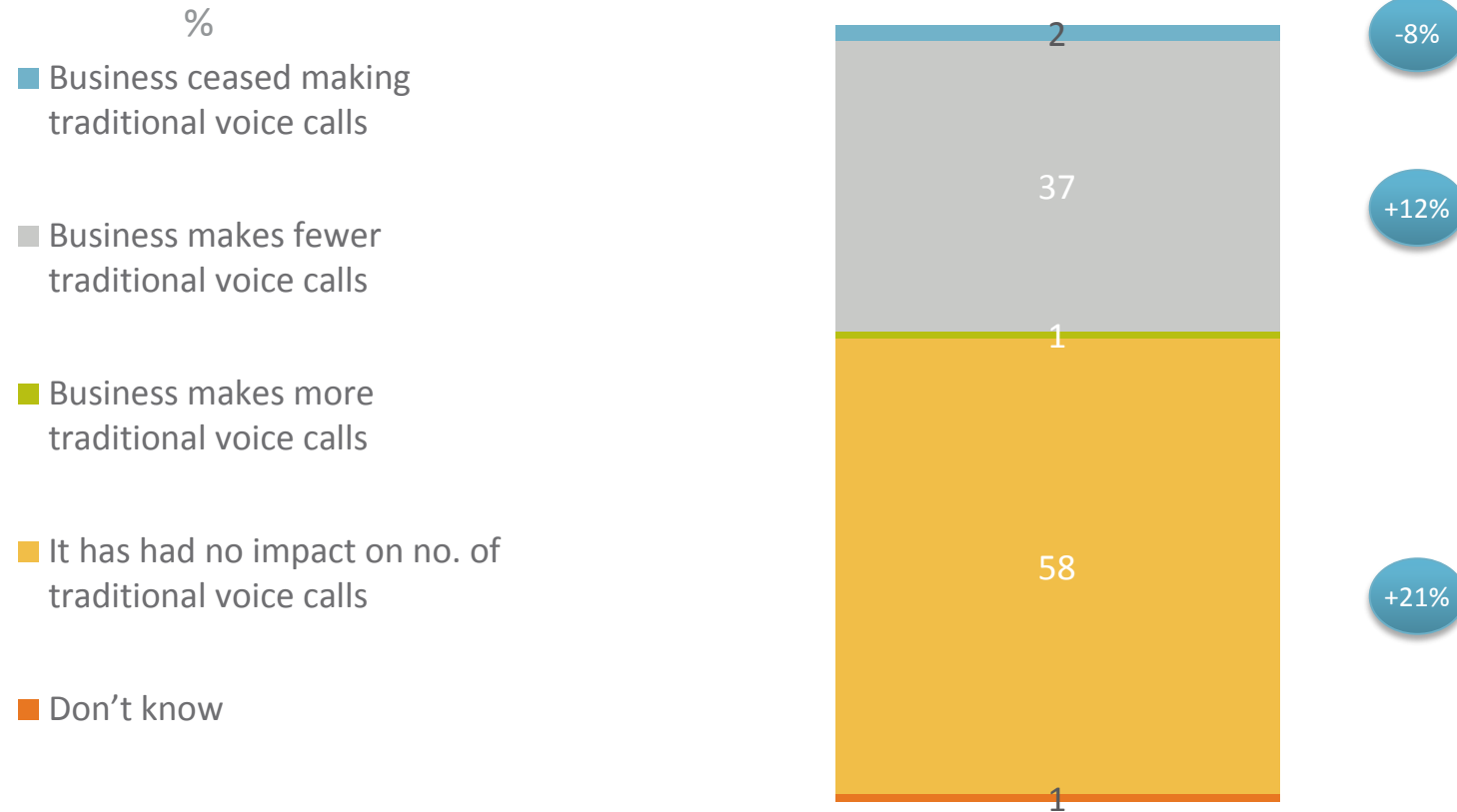
%	Sector									Region			Business Size		
	Total	Service (Utilities/ Professional)	Retail	** Wholesale	** Construction	Manufact.	** Health/ Education	*Govt./ Social Service	**Agri./ Forestry/ Fishing	DCLG city/ suburban	Other City/ Town	Rural (<1,500 population)	Micro	Small	Medium
Several times per day	5	8	4	3	2	7	0	*	10	7	4	3	5	8	17
Several times per week	5	4	5	6	6	6	2	*	4	5	3	9	4	8	2
Several times per month	5	8	2	3	8	3	0	*	4	7	1	7	5	5	2
Less frequently	14	15	13	16	16	13	9	*	14	18	12	6	14	14	24
Never	68	66	76	73	67	67	75	*	58	63	75	73	70	64	50
Don't know	2	0	0	0	1	5	14	*	9	1	5	1	2	1	5

Q.53 How often do you and other employees use voice over broadband service such as Skype/FaceTime/Viber to make a phone call?

Base: 502

The majority of those using VOIP claim that it has had no impact on the number of traditional voice calls that they make to landline numbers

Effect of VOIP on Calls Made to Landlines



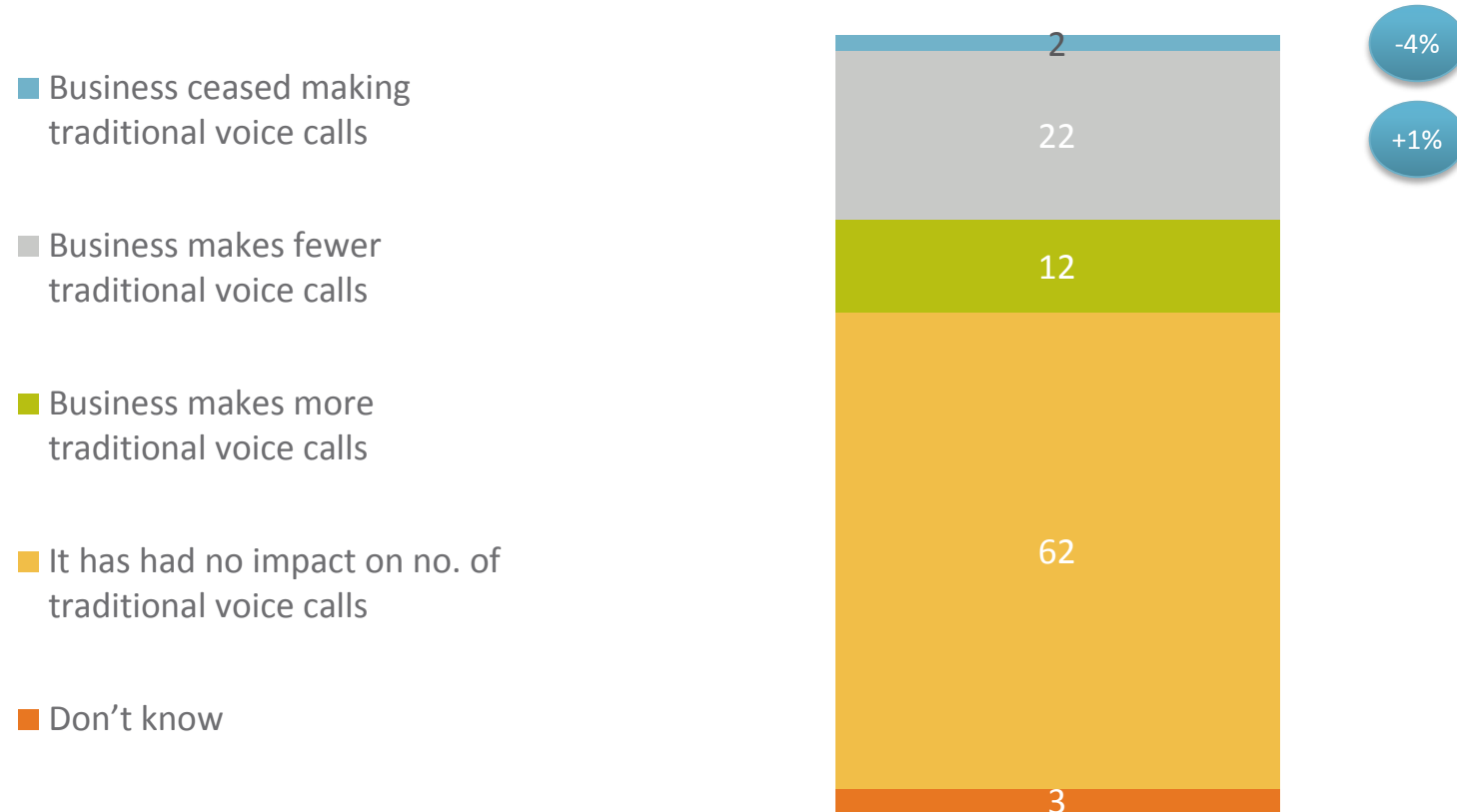
Q.55a Thinking of your company's usage of voice over broadband services such as Skype/FaceTime/Viber to make a phone call for business purposes which of the following best describes its impact on your business' usage of traditional voice calls to Landline numbers?

Base: 172

66

In line with number of calls made to landline numbers, the majority using VOIP indicate that it has had no impact on the number of traditional voice calls to mobile numbers

Effect of VOIP on Calls Made to Mobile Numbers



Q.55b Thinking of your company's usage of voice over broadband services such as Skype/FaceTime/Viber to make a phone call for business purposes which of the following best describes its impact on your business'*usage of traditional voice calls to Mobile numbers?

Base: 172

67



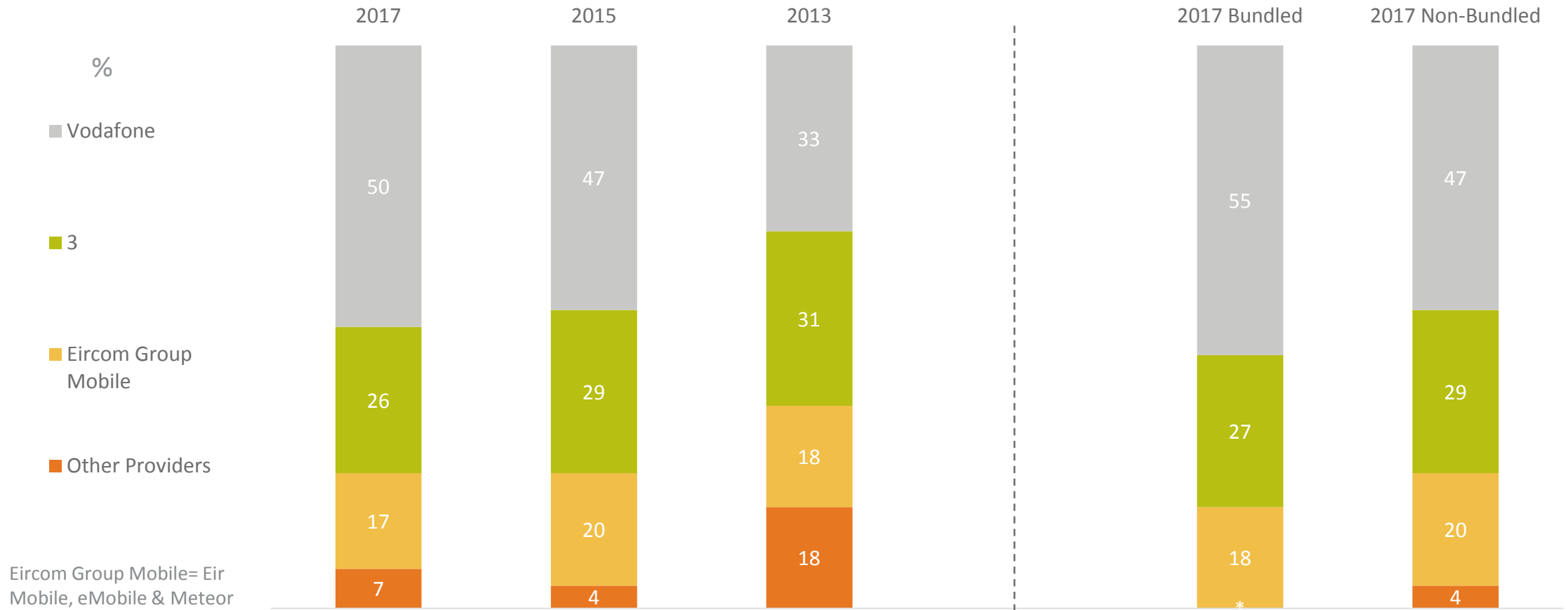
Mobile Broadband Usage



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Vodafone remains the largest provider of mobile broadband services, with market shares broadly consistent with 2015

Main Mobile Broadband Providers



Q.7 What company do you currently use as your main mobile broadband provider?

Base: 88

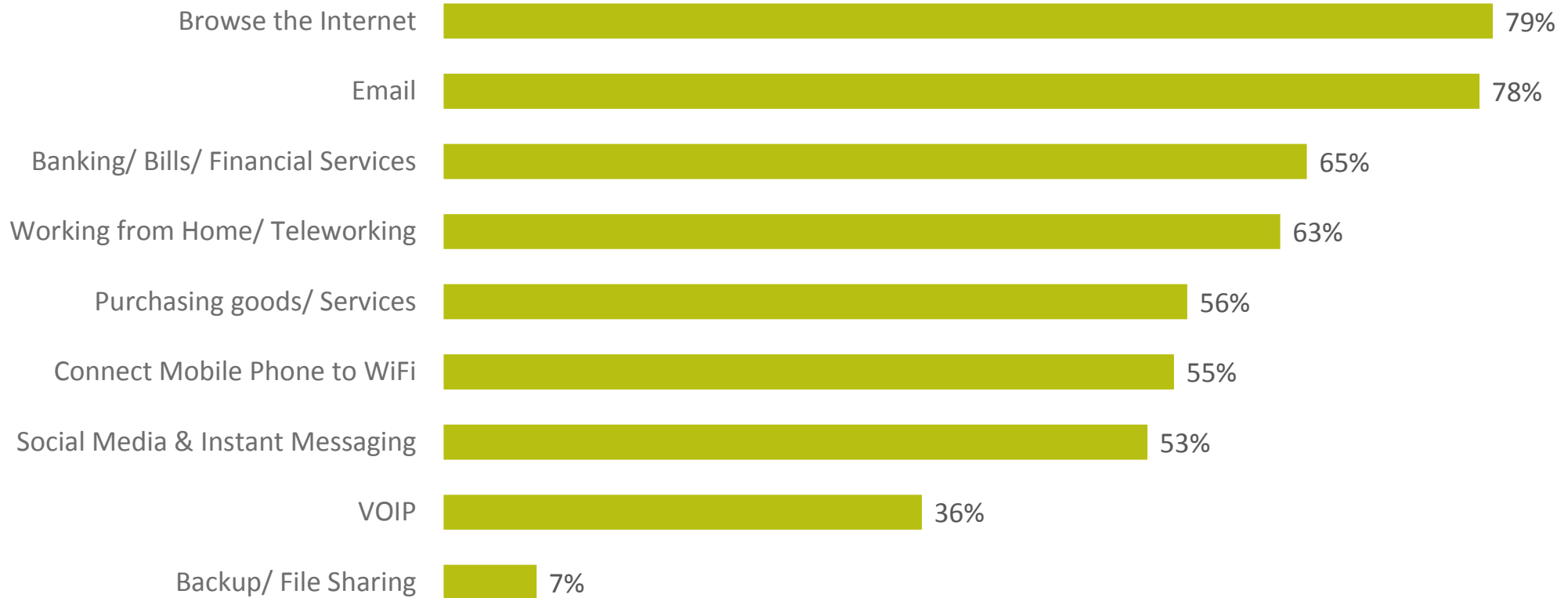
69



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As with fixed broadband services, mobile broadband is most likely to be used for internet browsing and email.

Mobile Broadband Service Usage



Q.67 What do you and other employees in your business use your mobile broadband service for?

Base: 88

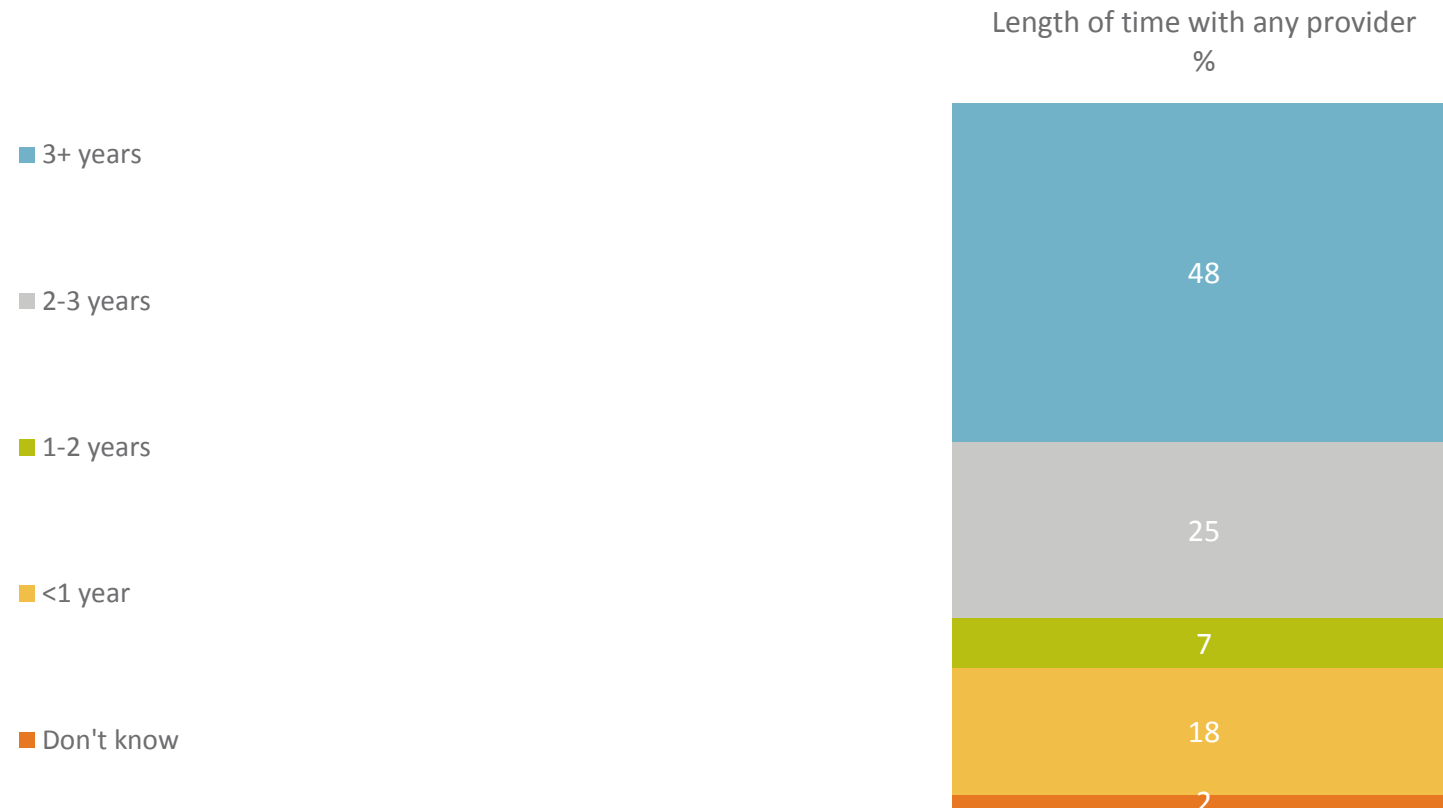
70



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Almost half of SMEs with mobile broadband have been with the same provider for three or more years.

Mobile Broadband- Length of Time with Provider



Q.74 Have you previously purchased this service from other provider(s)?

Base: 88

71

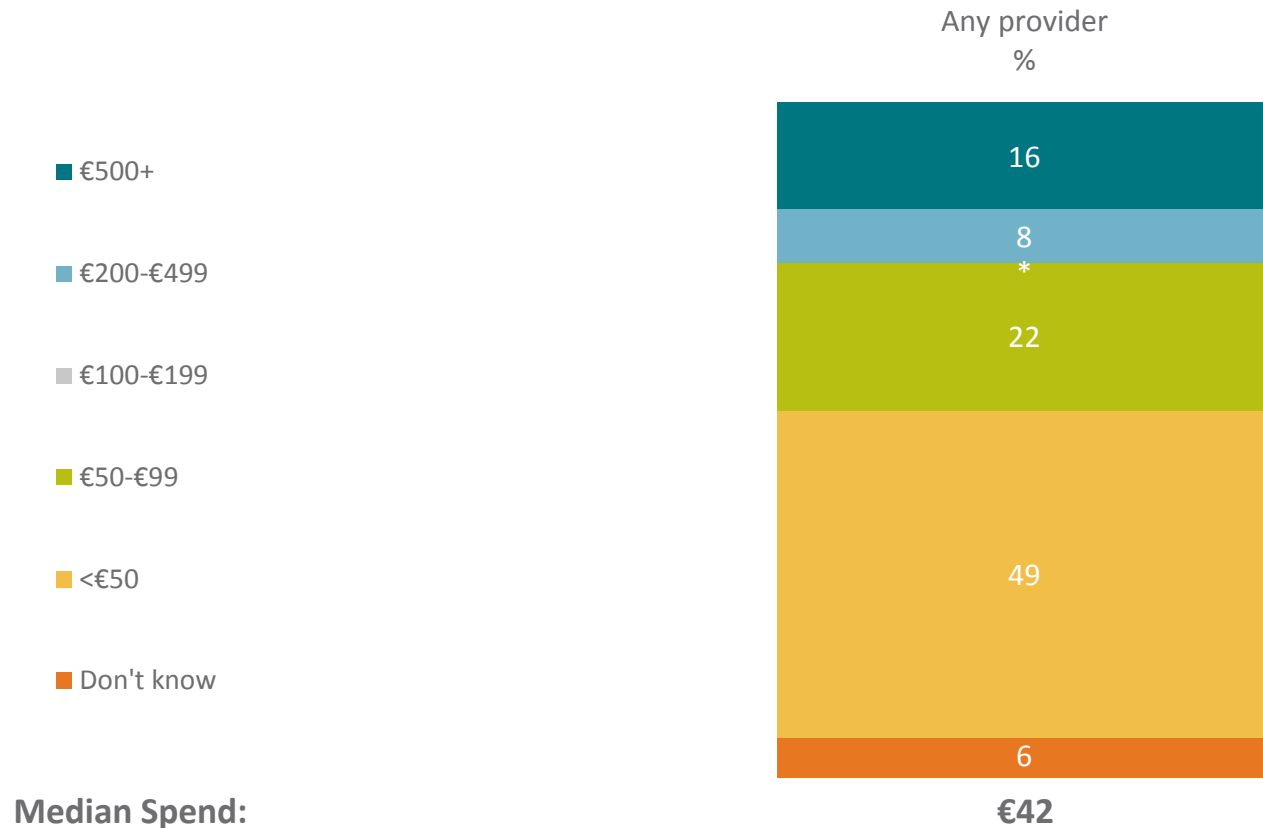
*Other Providers not shown due to small base sizes (<50).



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The media spend on mobile broadband services is €42 per month.

Mobile Broadband– Monthly Spend



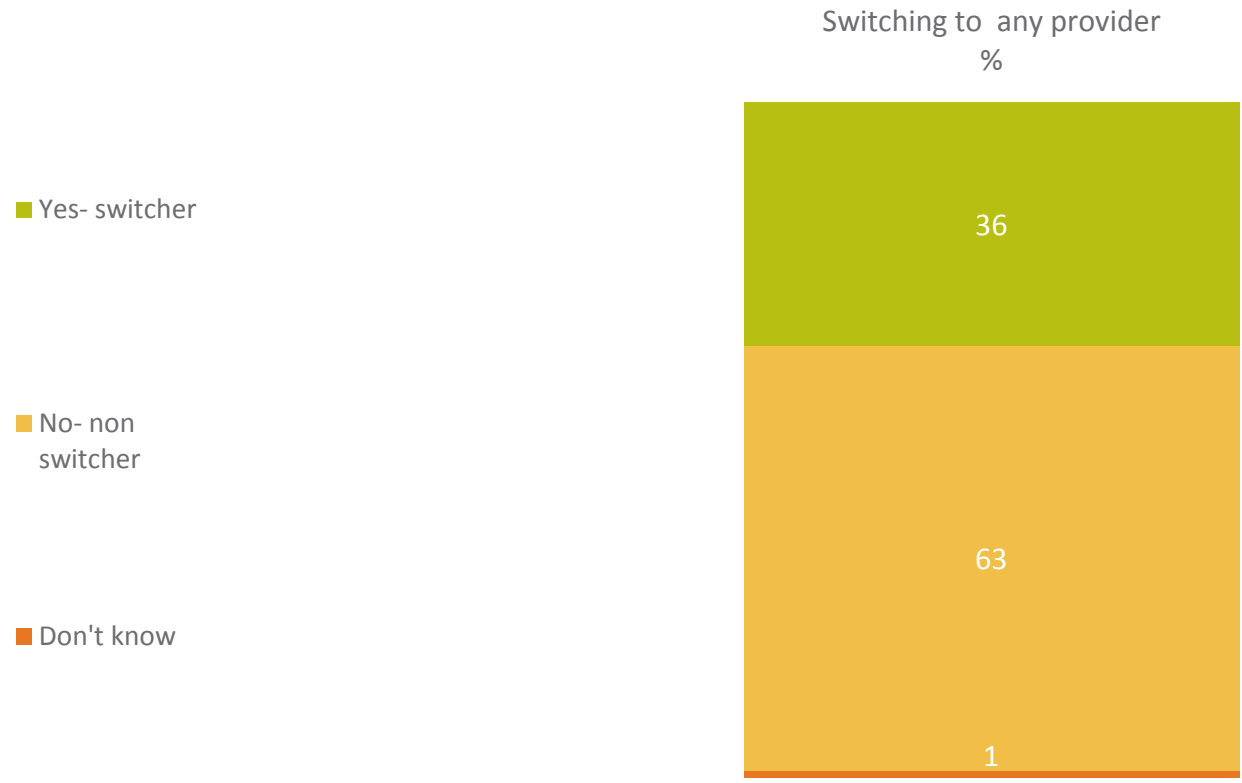
*Other Providers not shown due to small base sizes (<50).

Q.71b How much do you pay per month for your mobile broadband service?

Base: 51

Just over a third of mobile broadband customers have switched providers at some point.

Mobile Broadband– Incidence of Switching Provider



Q.74 Have you previously purchased this service from other provider(s)?

Base: 88

73

*Other Providers not shown due to small base sizes (<50).



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Mobile Broadband –Reasons for Selecting Provider

**Caution, small base size*

57%



% of those selecting a new mobile broadband provider in the past 12 months did so because it was the only option available in the area.



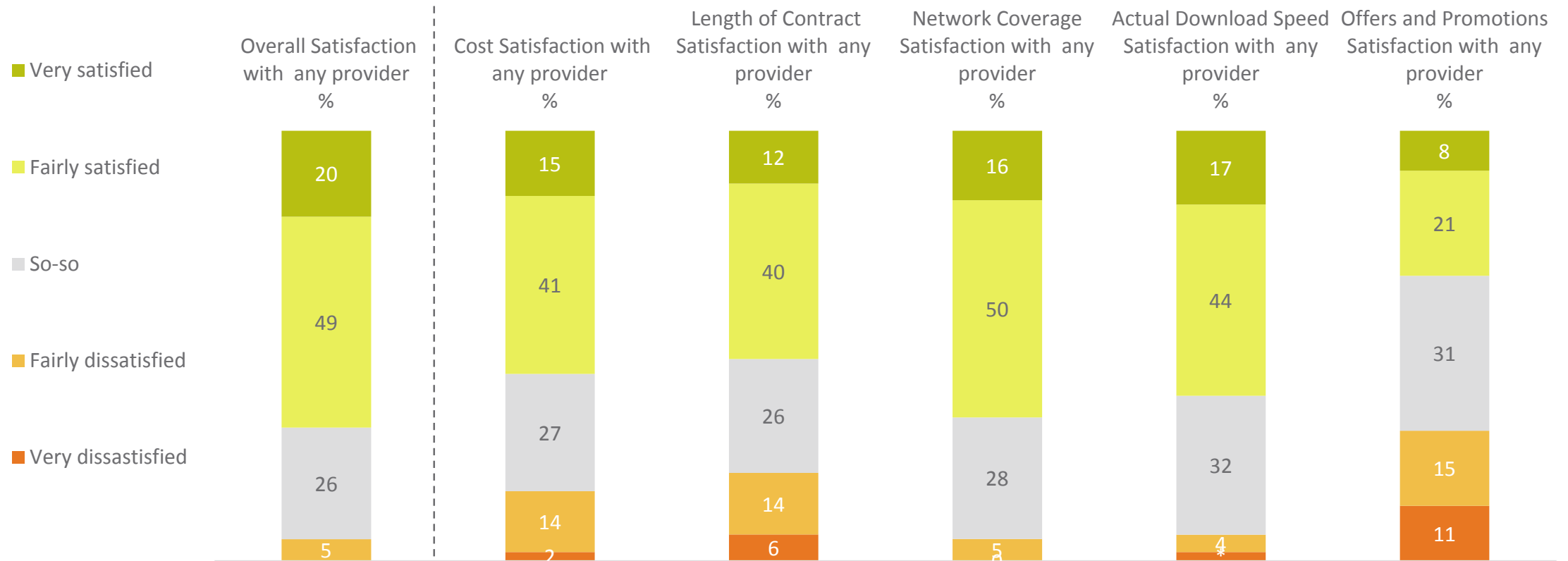
Q.75 What prompted you to select this provider within the past year?

Base: 5

74

While over two-thirds are satisfied with their mobile broadband provider, satisfaction for each service attribute is lower than the level of overall satisfaction.

Mobile Broadband- Satisfaction with Providers



Q.65a Out of 10 where 1 is very dissatisfied and 10 is very satisfied how satisfied are you with the service you receive from your mobile broadband supplier?

Base: 88

Q.65b Out of 10, where 1 is very dissatisfied and 10 is very dissatisfied, how satisfied are you with the [insert service] service you receive from this supplier?

Base: 88

*Other Providers not shown due to small base sizes (<50).

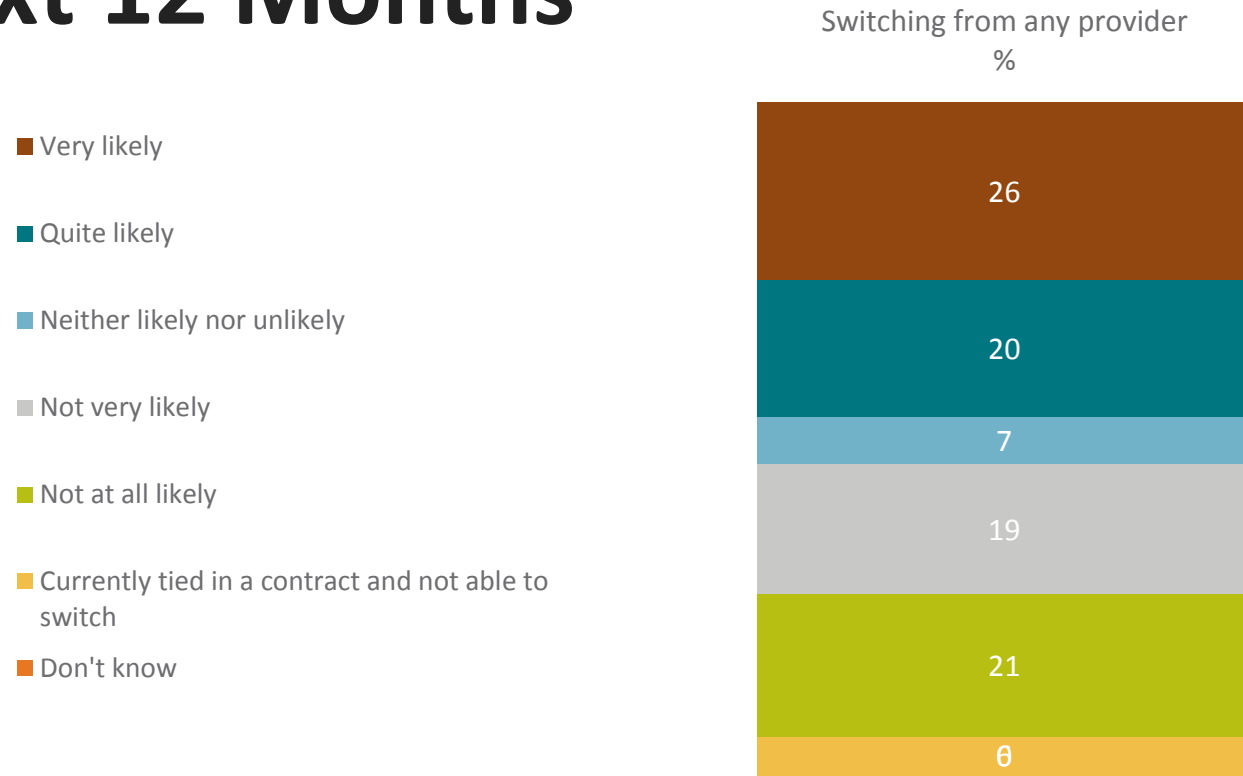


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Consideration to switch mobile broadband is quite high, with almost half considering to switch over the next 12 months.

Mobile Broadband– Likelihood to Switch Provider in the Next 12 Months



Q.78 How likely are you to consider switching mobile broadband service supplier within the next 12 months?

Base: 88

76

*Other Providers not shown due to small base sizes (<50).



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New and Old Technologies



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While usage of traditional telecommunications services (e.g. Directory Enquiries and Telephone Books) are used by a minority of businesses, they are more widely used in certain types of businesses

Service Use in the Last 6 Months

%	Sector									Region			Business Size		
	Total	Service (Utilities/ Professional)	Retail	** Wholesale	** Construction	Manufact.	** Health/ Education	*Govt./ Social Service	**Agri./ Forestry/ Fishing	DCLG city/ suburban	Other City/ Town	Rural (<1,500 population)	Micro	Small	Medium
Directory Enquiries	19	15	22	23	24	20	10	*	29	17	17	30	17	27	47
Printed Telephone Book	12	15	10	15	3	18	2	*	6	9	16	18	13	6	23
Teletext	3	3	1	10	8	8	0	*	0	2	4	7	4	1	5
Sent Letter/ Postcard	78	79	78	84	67	83	76	*	76	82	76	75	77	86	85
Received Letter/ Postcards	86	86	89	92	81	93	74	*	78	90	84	81	86	88	96
Sent/ Received a Fax	28	24	33	62	37	25	16	*	34	28	31	22	25	43	65
Videocall	26	29	21	27	28	26	15	*	34	27	23	28	24	34	49

Q.89 In the last 6 months, have you or your business used any of the following products, services or technologies in Ireland for business purposes?

Base: 508

78

60% of businesses use a tablet within their business, with less than 1 in 10 using “smart” devices.

Products, Services & Technologies Current Use

%	Sector									Region			Business Size		
	Total	Service (Utilities/ Professional)	Retail	** Wholesale	** Construction	Manufact.	** Health/ Education	*Govt./ Social Service	**Agri./ Forestry/ Fishing	DCLG city/ suburban	Other City/ Town	Rural (<1,500 population)	Micro	Small	Medium
Tablet/ iPad	60	57	60	59	77	73	57	*	77	66	55	51	60	55	72
Accepting Apple/ Android Pay	12	8	18	3	11	24	4	*	15	10	10	18	11	15	21
“Smart” Devices	8	8	8	5	23	5	5	*	13	8	10	5	7	12	7
Petrol/ Diesel based Car/ Van/ Lorry	65	63	66	86	84	75	42	*	85	60	70	68	67	52	67
Hybrid Car/ Van/ Lorry	4	5	3	4	3	2	7	*	0	4	7	3	4	7	2
Fully Electric Car/ Van/ Lorry	1	2	2	2	1	0	0	*	0	1	1	2	1	5	0

Q.90a Do you currently use any of the following products, services, or technologies within your business?

Base: 508

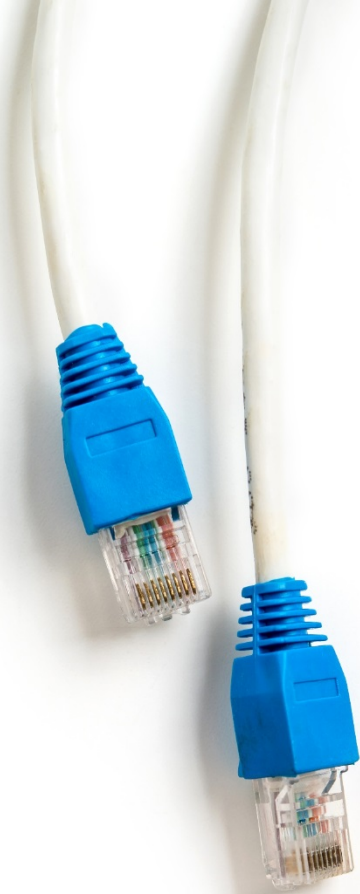
Expected future usage of technologies differs widely, with the vast majority expecting to be using a tablet in five years time while less than 1 in 10 expect to be driving an autonomous car

Products, Services & Technologies Future Use (5 years)

%	Sector									Region			Business Size		
	Total	Service (Utilities/ Professional)	Retail	** Wholesale	** Construction	Manufact.	** Health/ Education	*Govt./ Social Service	**Agri./ Forestry/ Fishing	DCLG city/ suburban	Other City/ Town	Rural (<1,500 population)	Micro	Small	Medium
Tablet/ iPad	86	83	87	90	97	95	84	*	90	91	82	79	86	88	91
Accepting Apple/ Android Pay	61	59	71	63	67	58	57	*	50	65	54	60	61	63	59
“Smart” Devices	58	59	56	65	67	66	52	*	41	64	55	49	58	64	59
Petrol/ Diesel based Car/ Van/ Lorry	66	63	68	74	71	81	58	*	77	62	67	75	66	63	77
Hybrid Car/ Van/ Lorry	39	40	36	43	47	34	42	*	40	43	37	32	38	43	33
Fully Electric Car/ Van/ Lorry	24	24	25	24	34	22	18	*	17	26	22	19	24	25	21
Autonomous/ Self-driving Car	8	6	10	8	9	12	9	*	3	10	8	3	8	10	2

Q.90b Do you see you or your business owning or using any of the following products, services or technologies in your day to day life or at home in five years time?

Base: 508
80



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