



Commission for
Communications Regulation

SME & Corporate ICT Research H2 2008

October '08 – November '08

A Review of Findings
by



Millward Brown IMS

November 2008

Presentation Outline



- Introduction
 - Research objectives
 - Methodology
 - Sample profile

- Research Findings
 - Fixed line market
 - Mobile market
 - Internet and broadband communications

- Key Findings

- Appendix: Sample Details



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Introduction

Presentation Outline



- This is the sixth wave of a business market tracking research programme being undertaken on behalf of ComReg by Millward Brown IMS, and is conducted twice a year. The previous wave was conducted between January and February 2008. There was no research conducted by MBIMS in 2007.
- The main purpose of the research is to gain an in-depth understanding of current information and communication technology (ICT) usage and attitudes to ICTs among a representative sample of Irish SMEs and large Corporate businesses.
- The specific areas explored in this wave of research included:
 - Fixed line market
 - Mobile market
 - Internet and broadband communications
- The survey findings will be used by ComReg for market understanding, future planning and policy formulation, and public dissemination.

Presentation Outline



- Telephone interviews were conducted among a sample of 524 SMEs and 50 Corporates. SMEs were defined as companies with less than 100 employees.
- Quota controls set for company size were based on the total number of employees each company size segment accounts for. Representative quota controls were also set for industry sector.
- Large Corporates were defined as companies employing 100 or more employees. Quota controls were set to ensure that 50% of the sample employed 100-299 employees, and 50% of the sample employed 300+ people. Representative quota controls were also set for industry sector.
- Where the final profile of respondents differed slightly to the quota controls originally set, minor weighting adjustments were made.
- Interviews were held with the person in the company responsible for decision-making in relation to telecommunication and IT services.
- The fieldwork was conducted between the 10th & 31st of October 2008.
- Where applicable, comparisons have been made with the results of previous research.
- Details of the sample profile are provided in the appendix.

When the Research was Conducted



Dates	Period
May – June 2005	H1 '05
November 2005	H2 '05
May – June 2006	H1 '06
November 2006 – January 2007	H2 '06
January – February 2008	H1 '08
October – November 2008	H2 '08 (This Period)



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Research Findings



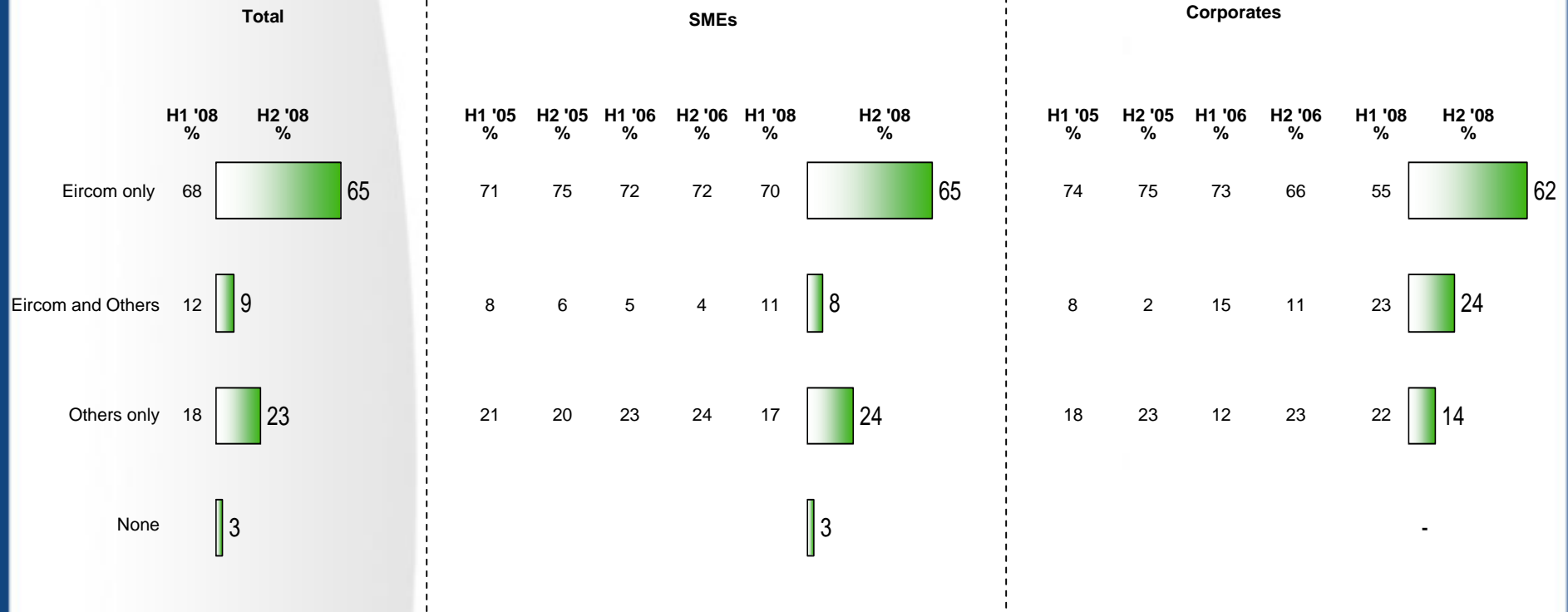
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Fixed Line Market

Fixed Line Suppliers Used



Q. Which fixed line phone services provider does your company use for its voice calls?



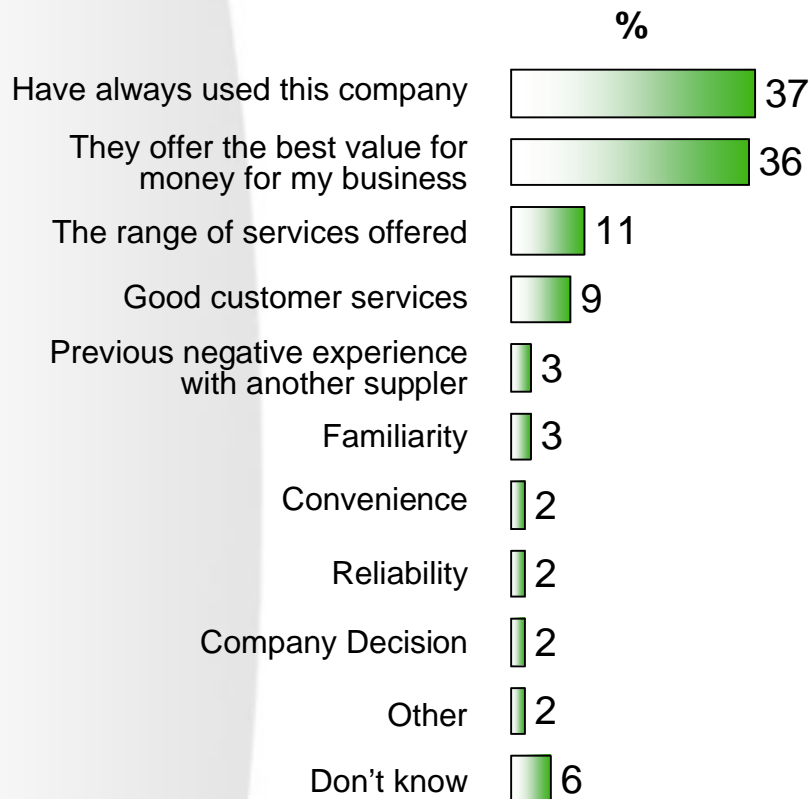
- The number of SMEs using Eircom only has decreased slightly this wave, and there appears more of a propensity for SMEs to have a provider other than Eircom, returning to similar levels seen in late 2006.
- While the majority of Corporate businesses use Eircom only, nearly one in four use Eircom and another supplier.
- Those businesses using a provider other than Eircom are more likely to be medium size companies (50-100) (28%), those operating in the financial services sector (32%), or based in Connaught/Ulster (31%)

Reasons for Choosing Fixed Line Provider



Q. What are your reasons for choosing your main fixed line supplier for your business?

NEW



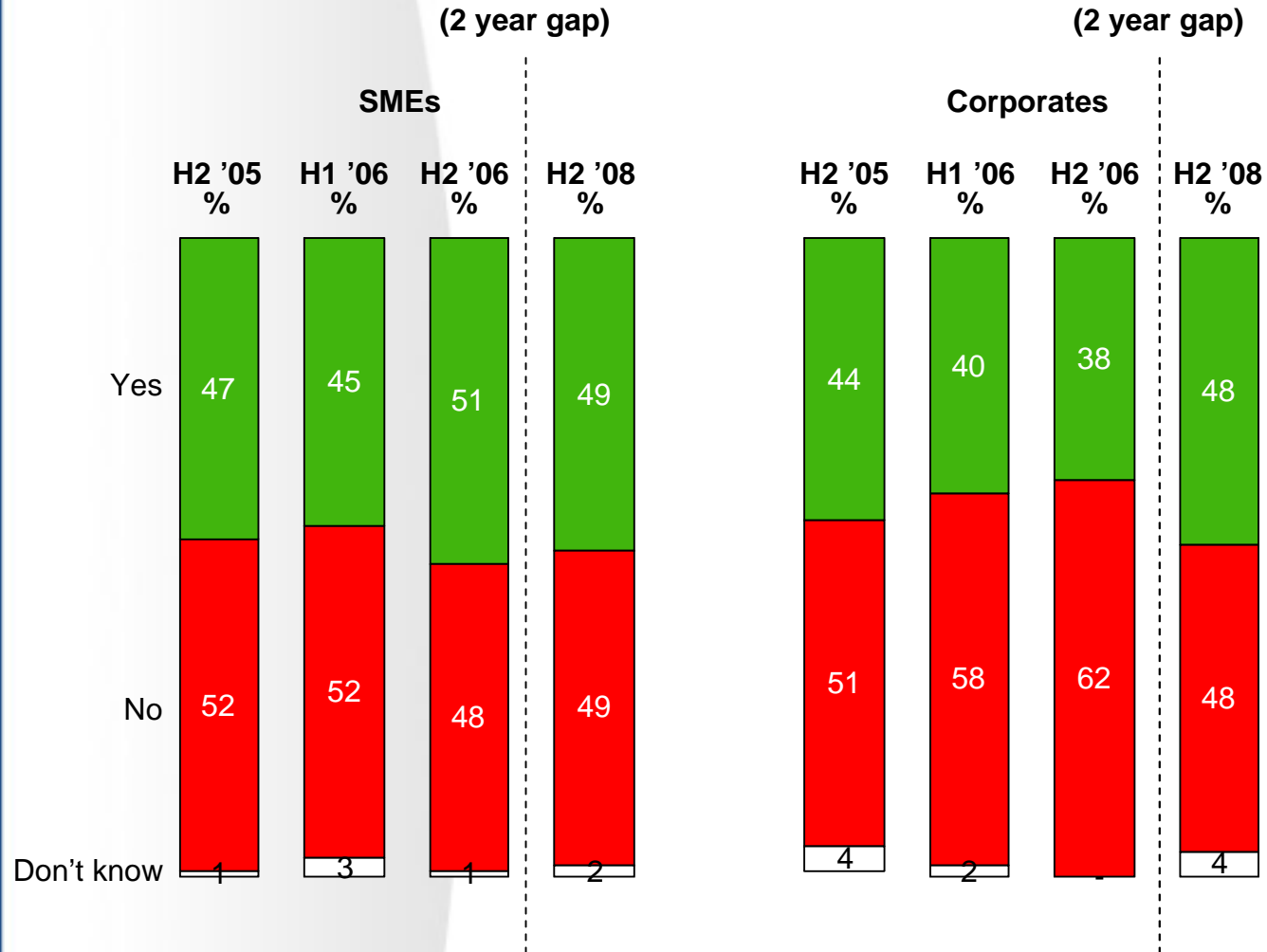
- “Have always used this company” (37%) is the highest reason given for businesses using their current provider. This is higher among those companies without internet connections (47%) and those using Eircom only (51%) for their fixed line.
- Getting the best value for money is another major reason given by businesses for choosing their main fixed line supplier (36%).
- This is higher among corporate businesses (48%), and among businesses who have switched fixed line provider in the last 12 months (63%). Businesses who use a supplier other than Eircom (73%) are also more likely to give this reason.

*Answers less than 2% not shown

Switching Activity



Q. Has your company ever switched fixed line service supplier?



- Nearly half of Corporates and SMEs claim to have ever switched fixed line telephone supplier.
- At an overall level, those businesses most likely to have switched fixed line supplier are also more likely to have switched mobile phone providers (60%), and internet service providers (77%).
- Companies in the Rest of Leinster (55%), or in the manufacturing industry sector (57%) are also more likely to have switched their fixed line provider.

Recent Switching Activity



Q. Did your company switch fixed line service provider in the last 12 months?



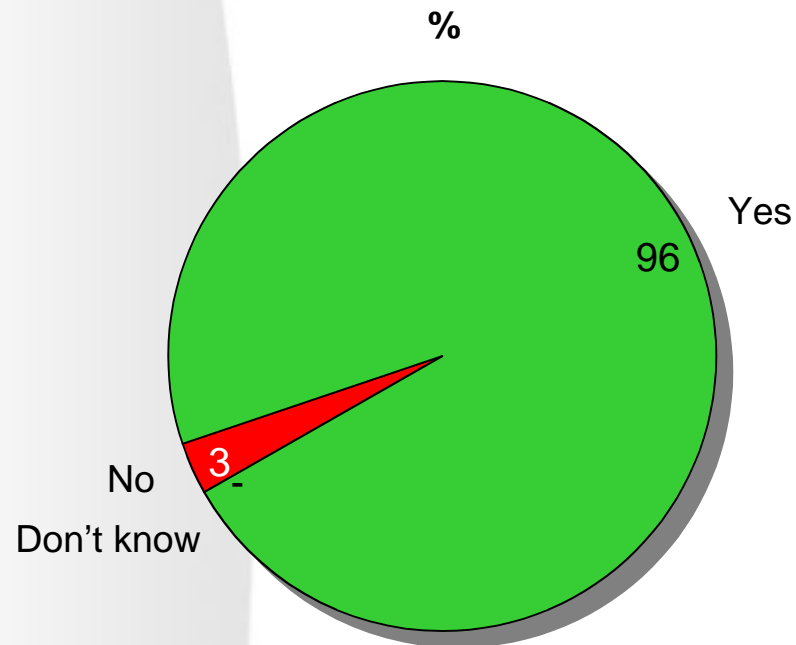
- Of those SMEs who have ever switched, a third had switched in the last 12 months. Fewer companies have switched in the last 12 months than had done when this was last measured in 2006.
- Among all businesses, 33% switched in the last 12 months. This is higher among businesses in the services industry (40%), and businesses based in Dublin (40%).

Porting of Fixed Numbers



Q. Did your company keep its fixed line telephone numbers when switching to a new fixed line phone supplier?

NEW



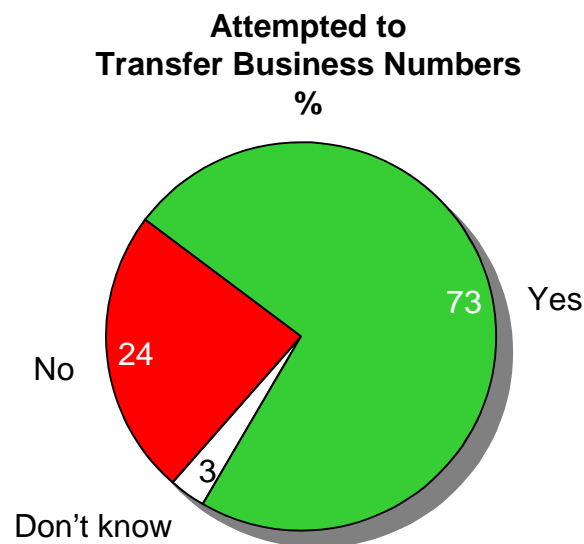
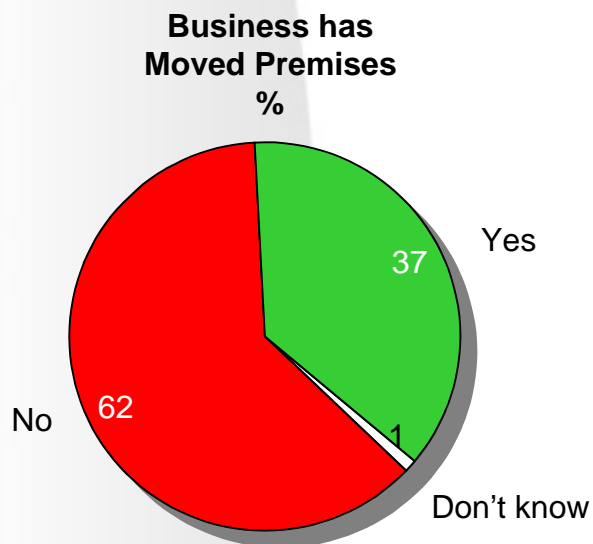
- The majority of businesses that switched their fixed phone service providers kept their original telephone numbers.

Transferring Fixed Telephone Numbers to New Premises



NEW

- Q. Has your business ever moved premises?
Q. Did you try to transfer your business telephone numbers to your new premise?



Yes - Higher Among:

Co. size 10-49	51%
Financial Services	57%
Dublin based businesses	48%

- Nearly four in ten businesses claim to have moved business premises. Nearly three quarters of these attempted to transfer their business telephone numbers to their new premises.

Base: All Who Have Fixed Line (n=485, 50)

Base: All Fixed Line Users moved business premises (n=183,14*)

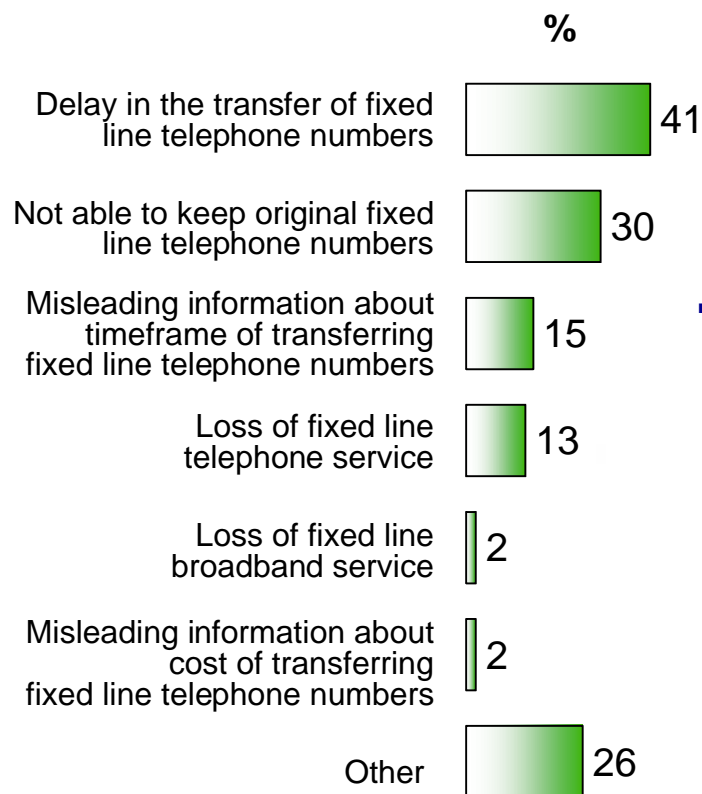
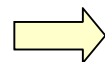
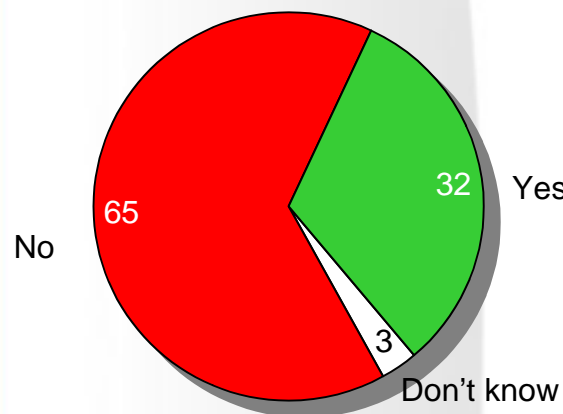
Issues with Transferring Fixed Telephone Numbers



- Q. Did you encounter any problems when transferring your business telephone numbers to your new premise?
Q. What problems did you encounter?

NEW

All Who Tried To Transfer Fixed Line Telephone No.
%



- Delay of transfer of numbers and not being able to keep their original number were the two main problems encountered by businesses trying to transfer their fixed line telephone users.

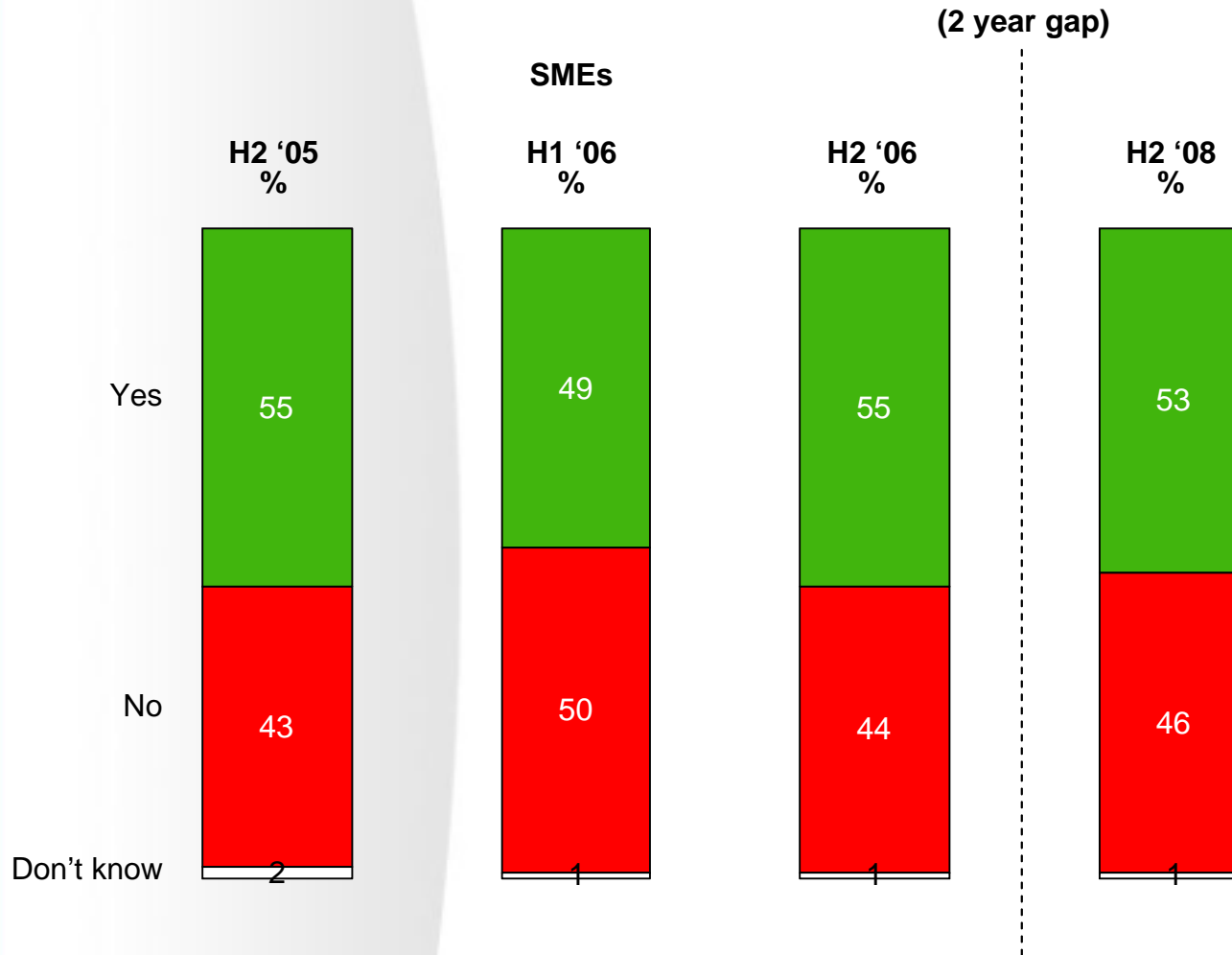
Base: All Who tried to Transfer Fixed Telephone Numbers (n=133,10*)

Base: All Who Encountered Problems with Transferring Telephone Number (n=43*, 3*)

Extent of Switching Back



Q. Has your company ever switched back to its original supplier?

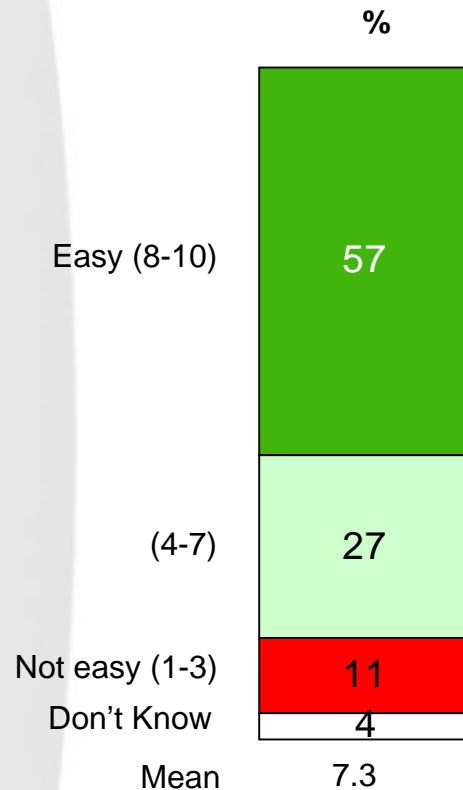


- Among all businesses, over half of those that had ever switched fixed line supplier switched back to their original supplier (52%)
- Companies that switched back were more likely to be based in the rest of Leinster (60%), and those who switched fixed line supplier in the last 12 months (56%).

Ease of Switching Fixed Line



Q. How easy was the process of switching between fixed providers on a scale of 1-10 where 1 means not easy at all and 10 means extremely easy?



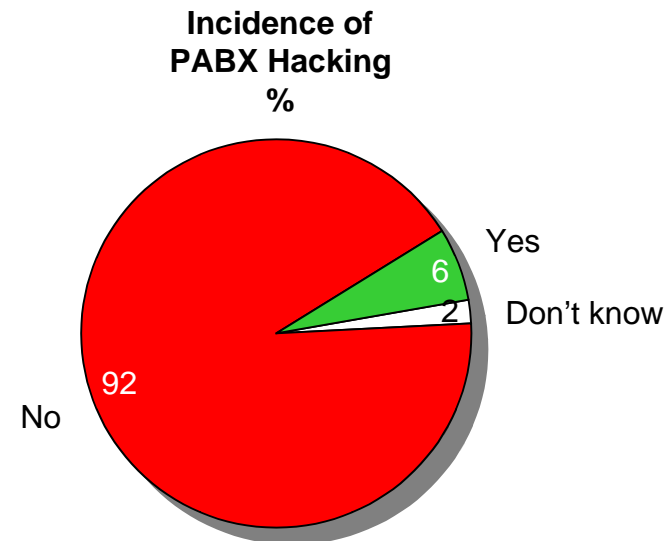
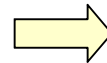
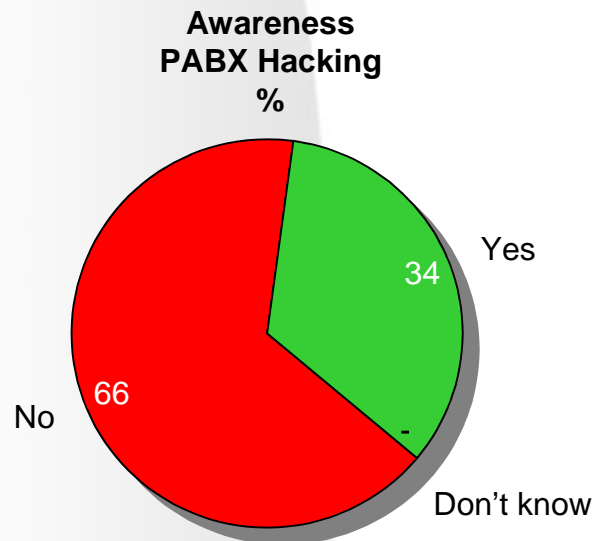
- The majority of businesses (57%) found the process of changing fixed line supplier easy. This was higher among those who are currently Eircom customers (60%), and those businesses that switched fixed line provider in the last 12 months (62%).

Security of Fixed Telephone System



- Q. With regards to the security of your fixed line telephone system, are you aware of PABX hacking?
 Q. Has your company PABX (that is a telephone system with a central switchboard and multiple extensions) ever been hacked or its security breached?

NEW



Yes - Higher Among:

Manufacturing industry	42%
Dublin based businesses	50%
Internet Connection	38%
Supplier other than Eircom	40%

- Only a small percentage (6%) of businesses aware of PABX hacking claim to have been affected by it.

Base: All Who Have Fixed Line (n=485, 50)

Base: All Fixed Line Users Heard of PABX Hacking (n=148, 33*)



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Mobile Market

Mobile Phone Market Share



Q. What company supplies your mobile telephone calls?

	SMEs						Corporates					
	H1 '05	H2 '05	H1 '06	H2 '06	H1 '08	H2 '08	H1 '05	H2 '05	H1 '06	H2 '06	H1 '08	H2 '08
Vodafone	45%	41%	34%	31%	46%	47%	54%	53%	70%	66%	66%	50%
O ₂	36%	39%	28%	26%	34%	36%	44%	47%	45%	28%	46%	58%
Meteor	2%	2%	3%	2%	4%	3%	2%	-	2%	4%	2%	2%
3	-	-	-	-	1%	2%	-	-	-	2%	-	2%
Eircom Mobile	-	-	-	-	-	1%	-	-	-	-	2%	2%
Other	-	-	-	-	-	1%	-	-	-	-	-	-
Don't know	2%	2%	2%	2%	1%	0	4%	2%	-	2%	4%	4%
No company mobile	23%	23%	38%	44%	22%	19%	12%	11%	4%	6%	6%	6%

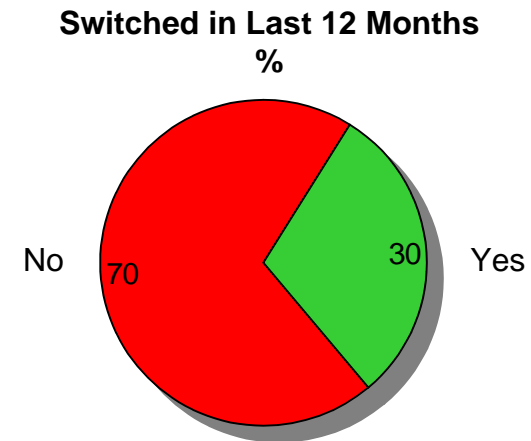
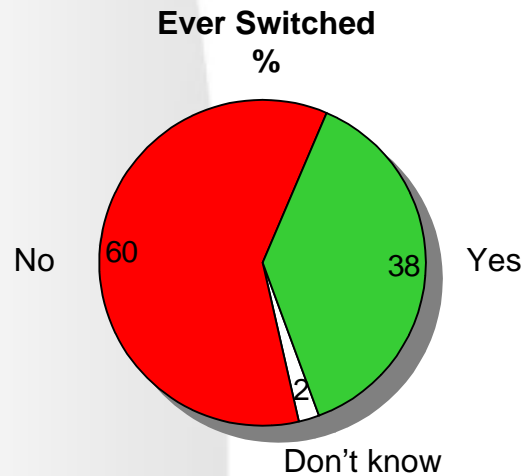
- Over 80% of all businesses surveyed provide their employees with company mobile phones.
- Vodafone and O2 continue to be the companies most used by businesses for their mobile phone needs.
- Smaller businesses (1-9) (23%), businesses based in Munster (23%), and those without an internet connection (42%) are less likely to provide business mobile phones to their employees.

Switching Mobile Provider



- Q. Has your company ever switched mobile phone service supplier?
Q. Did your company switch mobile phone supplier in the last 12 months?

NEW



Yes - Higher Among:

Co. size 10-49	46%
Mining and Services Sectors	43%
Ever switched Fixed line	43%
Switched Fixed line last 12 months	43%
Ever switched internet Provider	44%

Yes - Higher Among:

Co. size 1-9	35%
Businesses based in Munster	35%*

Base: All Who Supply Company Mobiles (n=407, 45*)

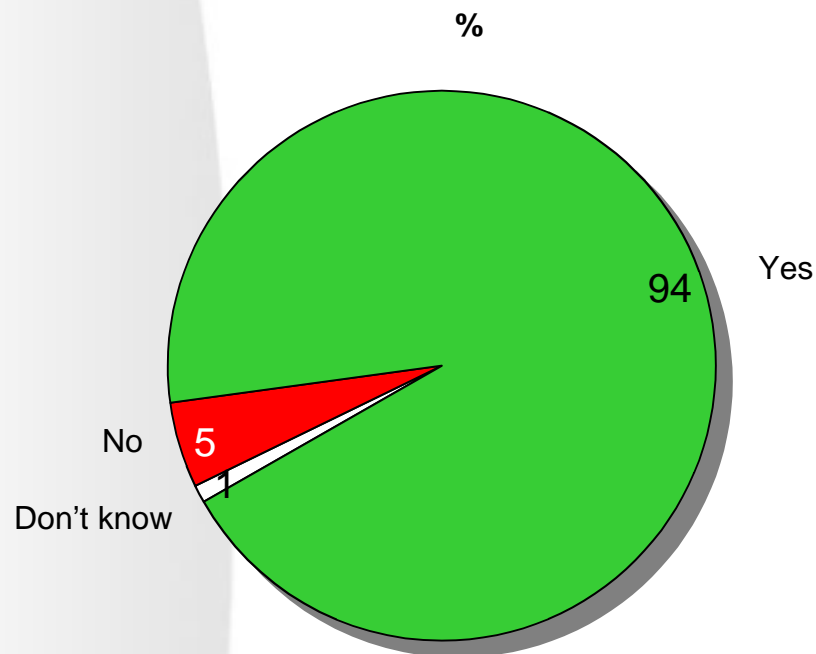
Base: All Who Ever Switched Mobile Supplier (n=154, 18*)

Mobile Number Porting



Q. Did your company keep its mobile telephone numbers when switching to a new mobile phone supplier?

NEW



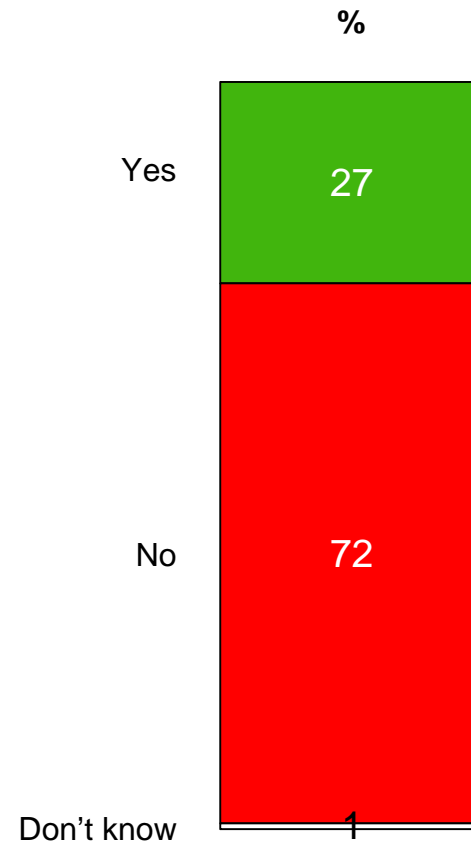
- The majority of businesses kept their mobile telephone numbers when switching to a new mobile phone supplier.

Switching Back to Original Supplier



Q. Has your company ever switched back to its original supplier?

NEW



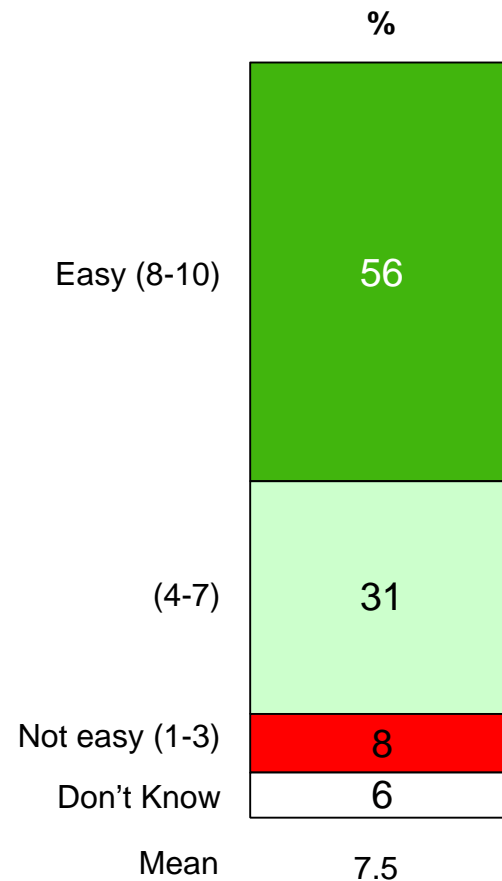
- Just over one in four businesses ever switched back to their original supplier.
- This was higher among businesses with 1-9 employees (33%), businesses based in Munster (33%*), or businesses using Vodafone as their mobile provider (37%).
- The incidence of switching back is also higher among those who switched mobile provider in the last 12 months (33%).

Ease of Switching Mobile Supplier



Q. How easy was the process of switching between mobile providers on a scale of 1 to 10 where 1 means not easy at all and 10 means extremely easy?

NEW



- Over half of businesses rated switching mobile phone providers as easy. This is higher among SMEs (59%), especially those with 1-9 employees (69%).

Mobile Data Device Usage



Q. Does your company currently provide any of the following mobile data devices to any of its employees?

	SMEs						Corporates*					
	H1 '05 %	H2 '05 %	H1 '06 %	H2 '06 %	H1 '08 %	H2 '08 %	H1 '05 %	H2 '05 %	H1 '06 %	H2 '06 %	H1 '08 %	H2 '08 %
3G handsets	6	7	13	25	14	27	18	19	42	41	45	57
3G Data Cards	n/a	6	6	9	9	15	n/a	42	47	40	57	51
GPRS or 2.5G handsets	7	10	12	13	11	13	43	33	47	55	38	38
Wireless LAN cards	10	8	10	11	11	10	45	26	47	42	48	43
Mobile Broadband (HSDPA)	n/a	n/a	n/a	n/a	16	26	n/a	n/a	n/a	n/a	55	57
None of these	77	76	70	58	70	54	30	39	25	28	18	13

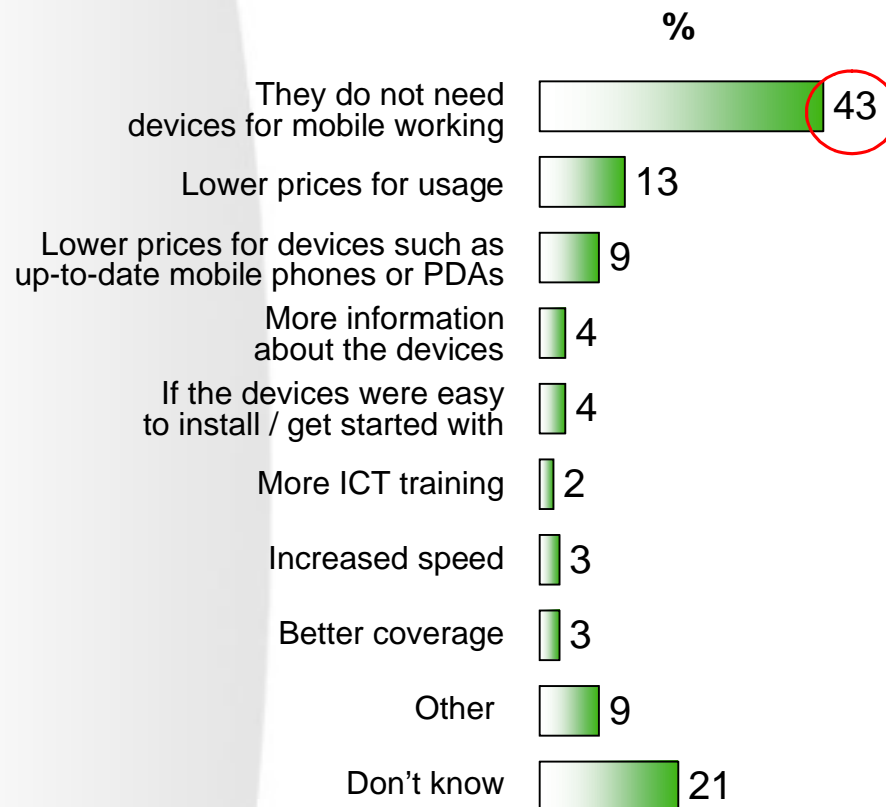
- Overall, half of businesses do not provide devices for mobile working, this rises to 68% among businesses with 1-9 employees. Those businesses based in Connaught/Ulster (61%) are also less likely to use these.
- 3G handsets and mobile broadband are the most widely used mobile data devices overall, and especially among Corporates (57% each).
- Business based in Dublin, and those operating in the manufacturing sector are more likely to use these devices.

Potential Use of Mobile Data Devices



Q. What, in your opinion, would make your company's employees start using more of the mobile data devices available for mobile working?

NEW

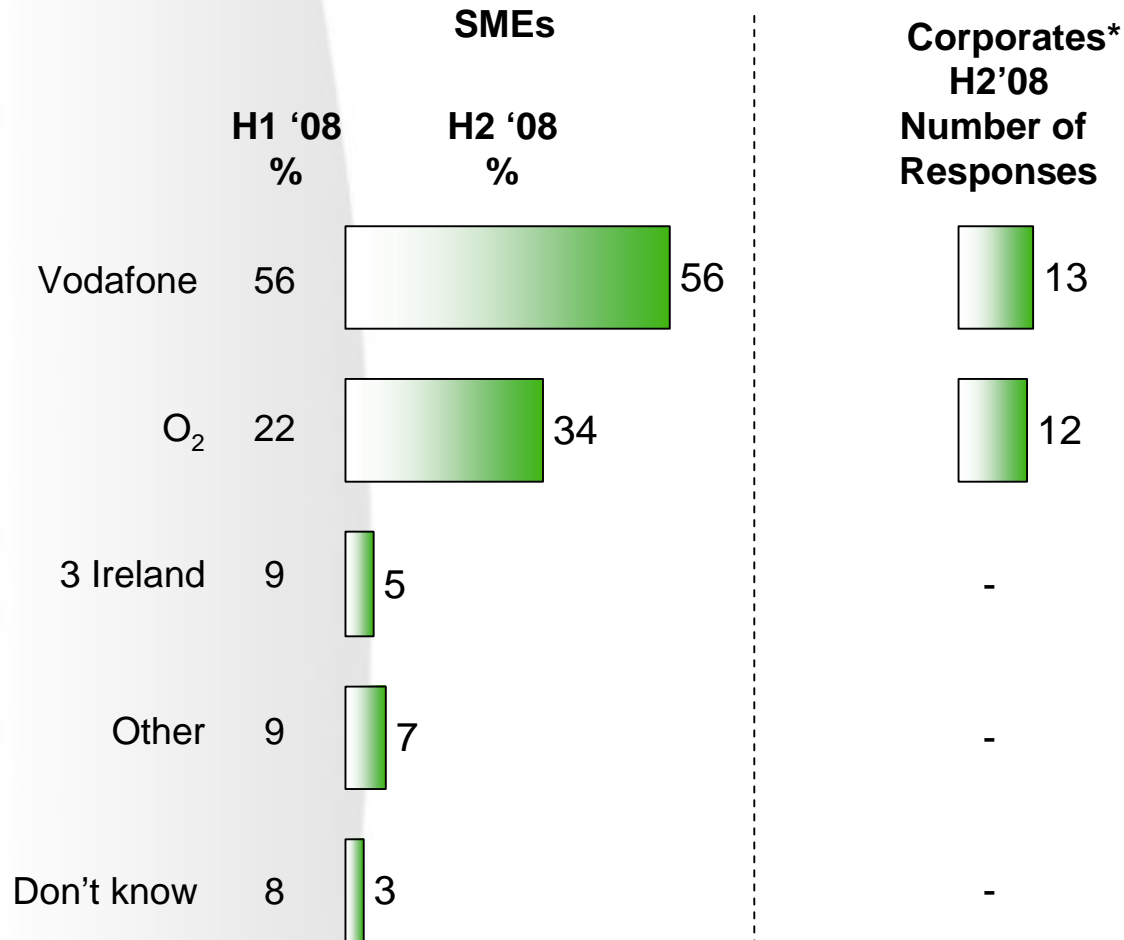


- There is a perceived lack of need for the use of mobile data devices, with over four in ten businesses stating that to be the case.
- Smaller businesses (1-9) (46%), businesses in the services sector (51%), and those based in the Rest of Leinster or Connaught/Ulster (52%), are more likely to state lack of need for these.
- Other than lack of need, cost of usage and devices are the most cited reasons for not using mobile data devices.

Mobile HSDPA Suppliers



Q. What provider supplies your mobile broadband (HSDPA) service?



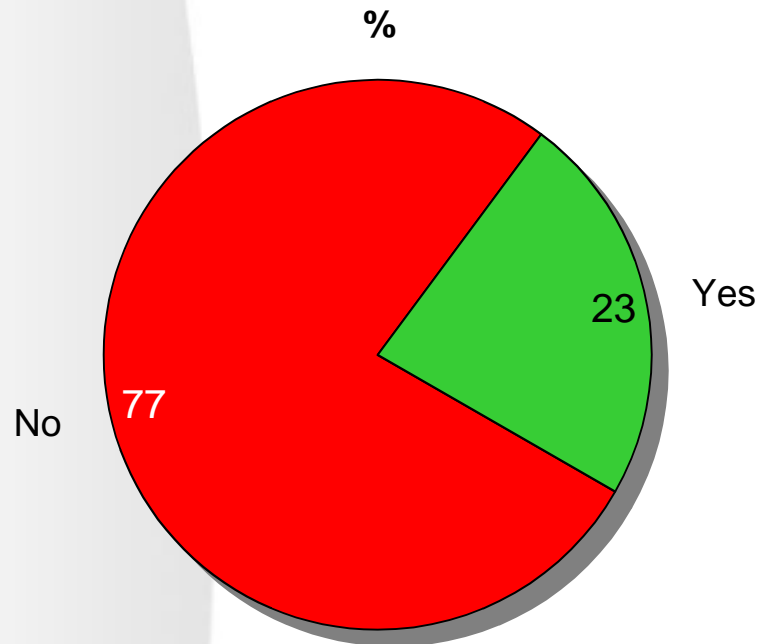
- Timeline: Vodafone entered the mobile broadband market towards the end of 2006, 3 Ireland followed in early 2007, and O2 entered the market in summer 2007. Meteor does not currently offer mobile broadband although it has announced that it will do so in early 2009.
- Mobile broadband supplied by Vodafone or O2 is used by most businesses that use this product.
- Among SMEs there has been an increase in the number of businesses using O2, while the percentage of these businesses using Vodafone has remained constant.

HSDPA Access



Q. Is this the only means of internet access for your business?

NEW



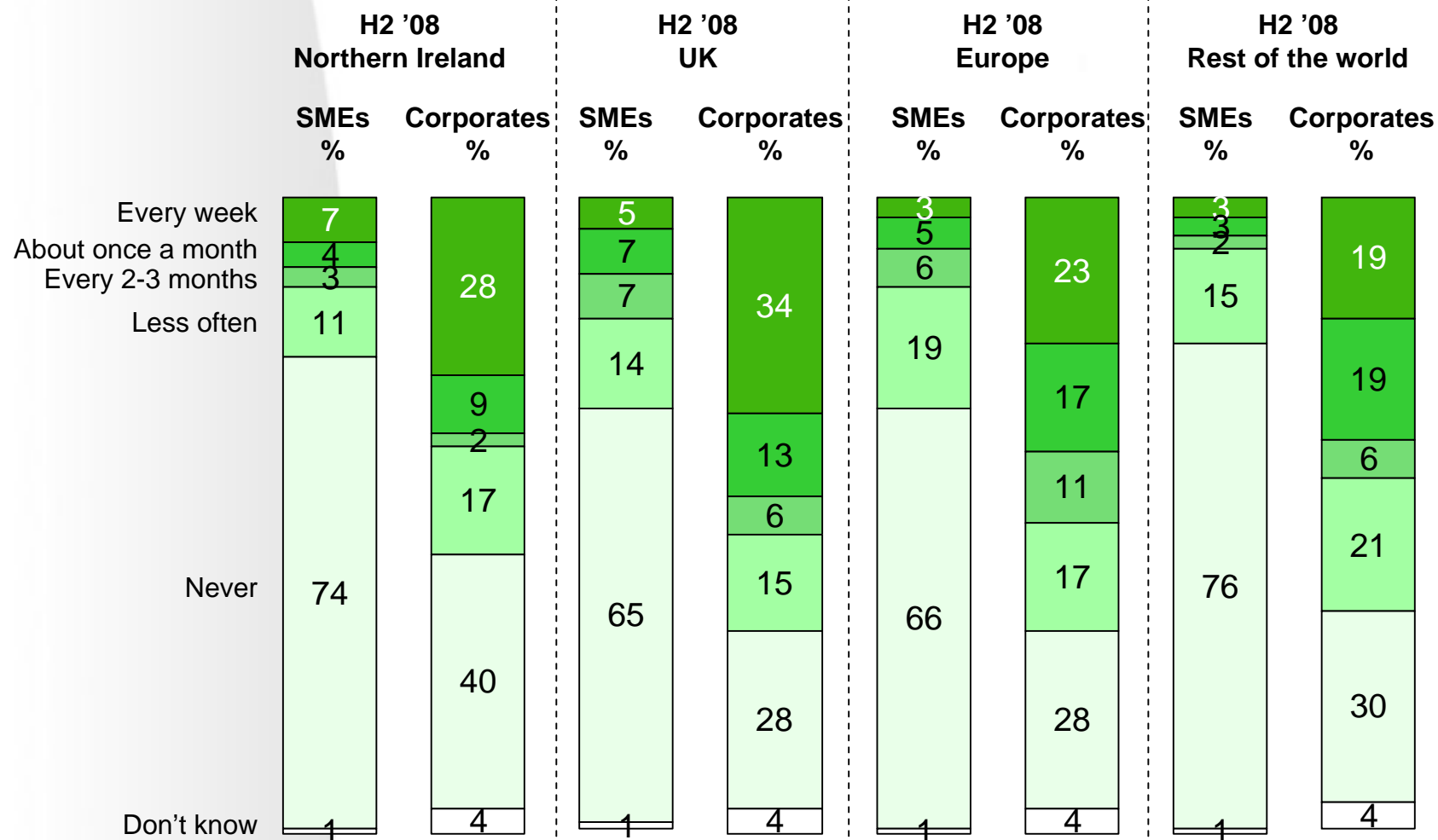
- Nearly one in four businesses using mobile broadband claim that it is their only means of internet access. These are more likely to be smaller businesses (1-9)*.

Use of Data Roaming higher among Corporates



Q. How often do company employees use company mobile phones in the following regions for data roaming?

NEW



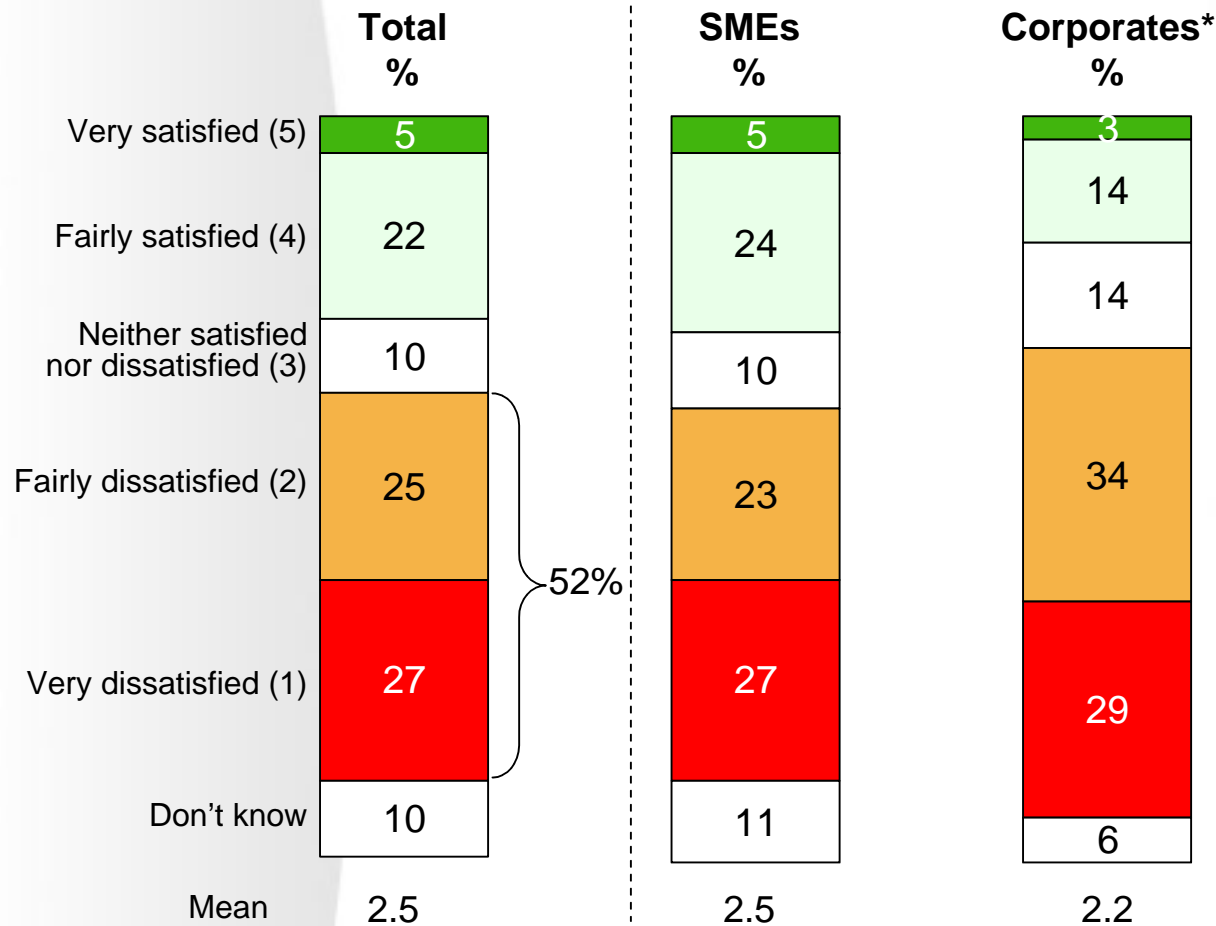
Base: All Who Supply Company Mobile Phones (n=405, 47*)

Satisfaction with Data Roaming Charges



Q. How satisfied are you with the current cost of the data roaming charges which your company pays when company mobiles are used abroad?

NEW



- There are high levels of dissatisfaction with the charges associated with data roaming. At an overall level 52% of respondents claim to be dissatisfied to some extent.
- Overall, dissatisfaction is higher among businesses operating in the manufacturing industry (60%).
- Corporate businesses also state higher rates of dissatisfaction with data roaming charges*.
- Satisfaction with data roaming charges is higher among companies with 10-49 employees (32%) and those based in the Rest of Leinster (32%).

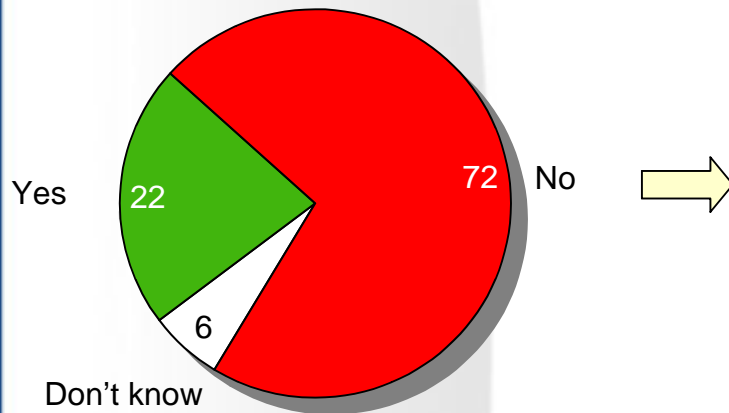
Use of Data Service When Abroad



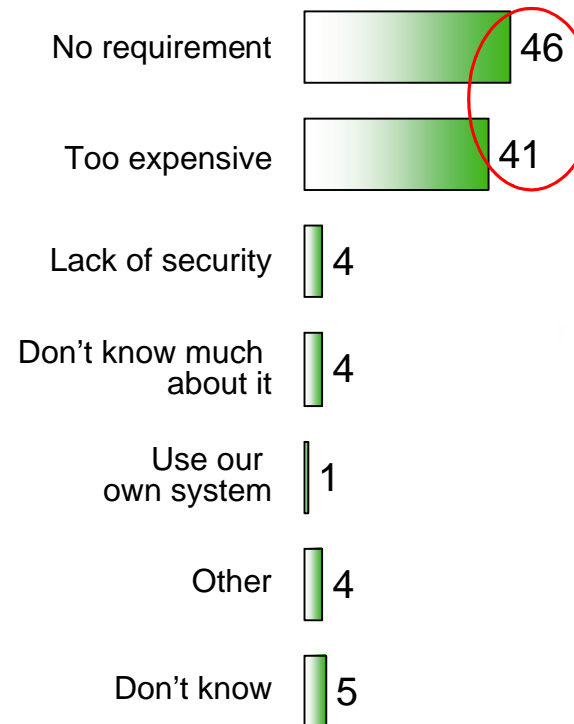
- Q. Does your company encourage employees to use advanced data services like accessing the internet over their mobile or using a data card, when abroad?
- Q. Why does the company not use / encourage the use of such services by employees?

NEW

Encourage use of data roaming?
%



Reasons for not encouraging data roaming?
%



- Lack of requirement, and the expense of data roaming are the main reasons given by businesses for not actively encouraging data roaming among their employees.

Base: All Data Roamers (n=187, 35*)

Base: All Not Encouraged to Use Data Roaming (n=160)



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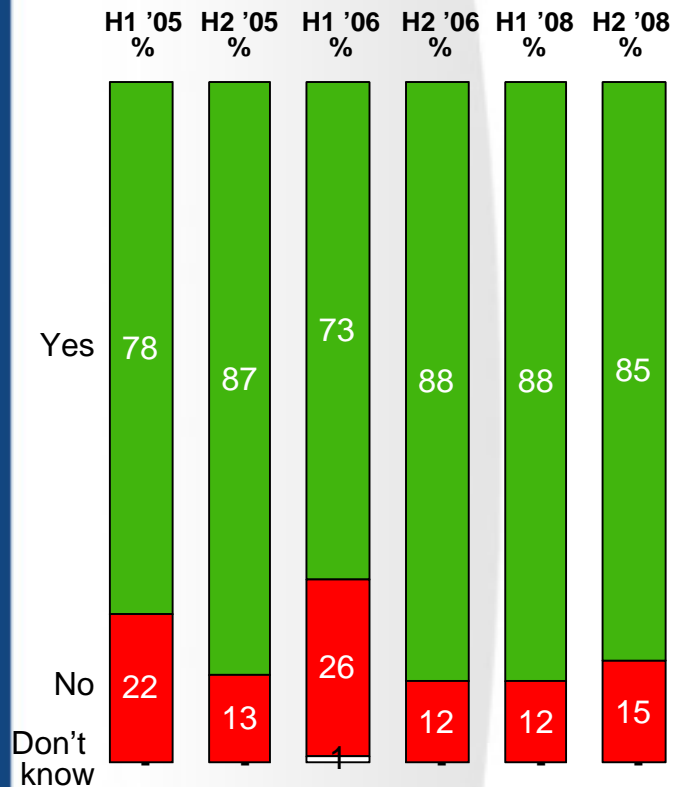
Internet & Broadband Communications

Internet Access

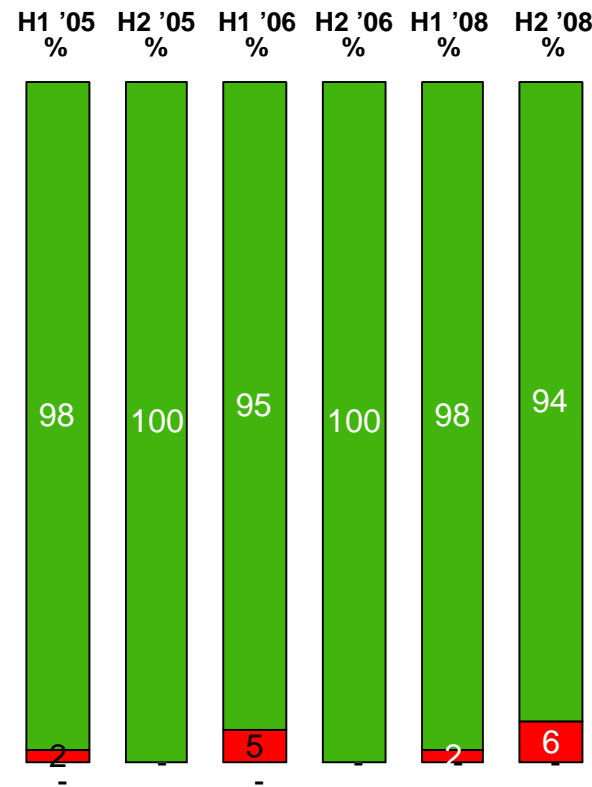


Q. Is your company connected to the internet?

SMEs



Corporates



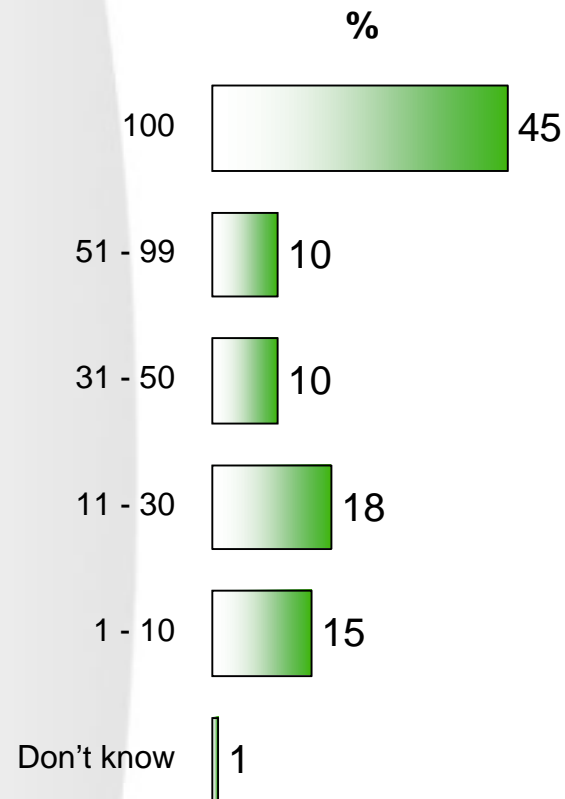
- Overall 86% of business have internet access, with levels of internet access among SMEs and Corporates remaining relatively constant.
- Companies employing 1-9 people are least likely to have internet access, with 75% having an internet connection.
- Those in the services industry are also less likely to be connected (75%).
- Access is highest among companies in Dublin and Connaught/Ulster (90% and 88% respectively).

Company Internet Usage



Q. What percentage of people employed by your business use computers connected to the internet?

NEW



- Of those business connected to the internet, 45% state that 100% of people employed by them have access to the internet.
- This rises to 61% among business employing less than 10 people, it is also higher among financial services businesses (76%), and businesses in the services industry (63%).
- Businesses in Dublin (58%) are also more likely to have 100% of employees connected to the internet.

Internet Supplier Used



Q. What internet supplier does your company use for connection to the internet?

	Total						SMEs						Corporates					
	H1 '05 %	H2 '05 %	H1 '06 %	H2 '06 %	H1 '08 %	H2 '08 %	H1 '05 %	H2 '05 %	H1 '06 %	H2 '06 %	H1 '08 %	H2 '08 %	H1 '05 %	H2 '05 %	H1 '06 %	H2 '06 %	H1 '08* %	H2 '08* %
Eircom	66	69	70	66	63	65	66	72	73	68	65	65	61	46	54	47	45	62
Other	34	31	30	34	37	35	34	28	27	32	35	35	39	54	46	53	55	38

- Eircom continues to be the main ISP in the market used by businesses in Ireland, although over a third of companies use a provider other than eircom for their internet connection (35%)

Type of Internet Connection Used



Q. What type of internet connection does your company use?

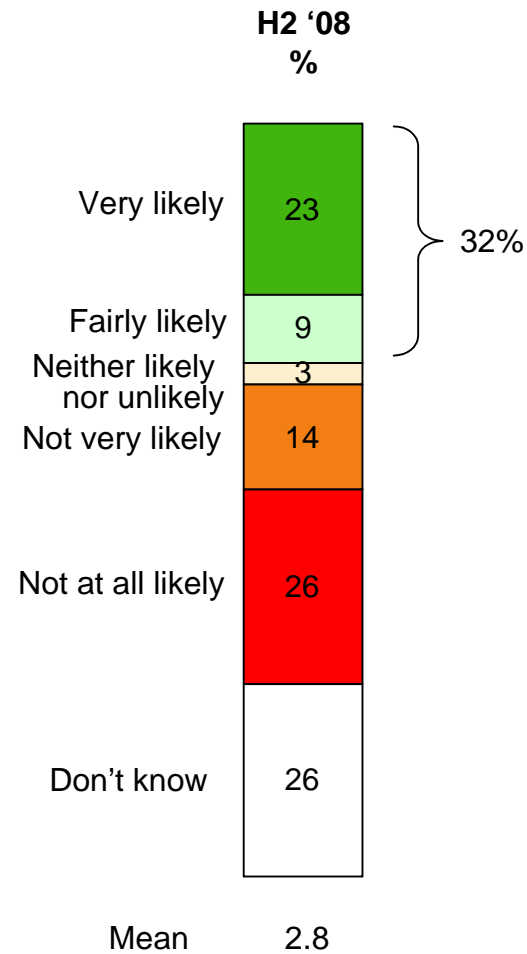
	SMEs						Corporates					
	H1'05 %	H2 '05 %	H1 '06 %	H2 '06 %	H1 '08 %	H2 '08 %	H1'05 %	H2 '05 %	H1 '06 %	H2 '06 %	H1 '08 %	H2 '08 %
DSL connection	49	57	59	52	66	61	51	67	57	29	55	53
Dial-up	27	24	19	17	7	4	2	6	2	7	4	2
ISDN line	15	13	9	9	7	8	8	13	4	3	6	13
Wireless broadband	4	2	4	9	12	9	2	6	4	12	10	2
Mobile broadband	n/a	n/a	n/a	n/a	5	9	n/a	n/a	n/a	n/a	6	6
Dedicated leased line	3	3	9	2	3	5	22	13	24	31	23	15
Fibre optic cable	-	-	-	1	2	3	-	-	-	9	6	23
Satellite	1	1	2	3	1	6	-	2	-	-	-	4
Other	1	2	-	2	2	1	2	8	5	12	10	13
Don't know	4	4	6	6	8	13	14	6	14	3	15	9

- Overall 86% of businesses have internet access. Of these, 76% use a broadband connection and 7% use a narrowband only connection.
- DSL continues to be the technology used by most businesses to access the internet (61% SME, 53% corporate).

Likelihood of Connection to Broadband



Q. How likely is your company to get a broadband connection in the next 12 months?



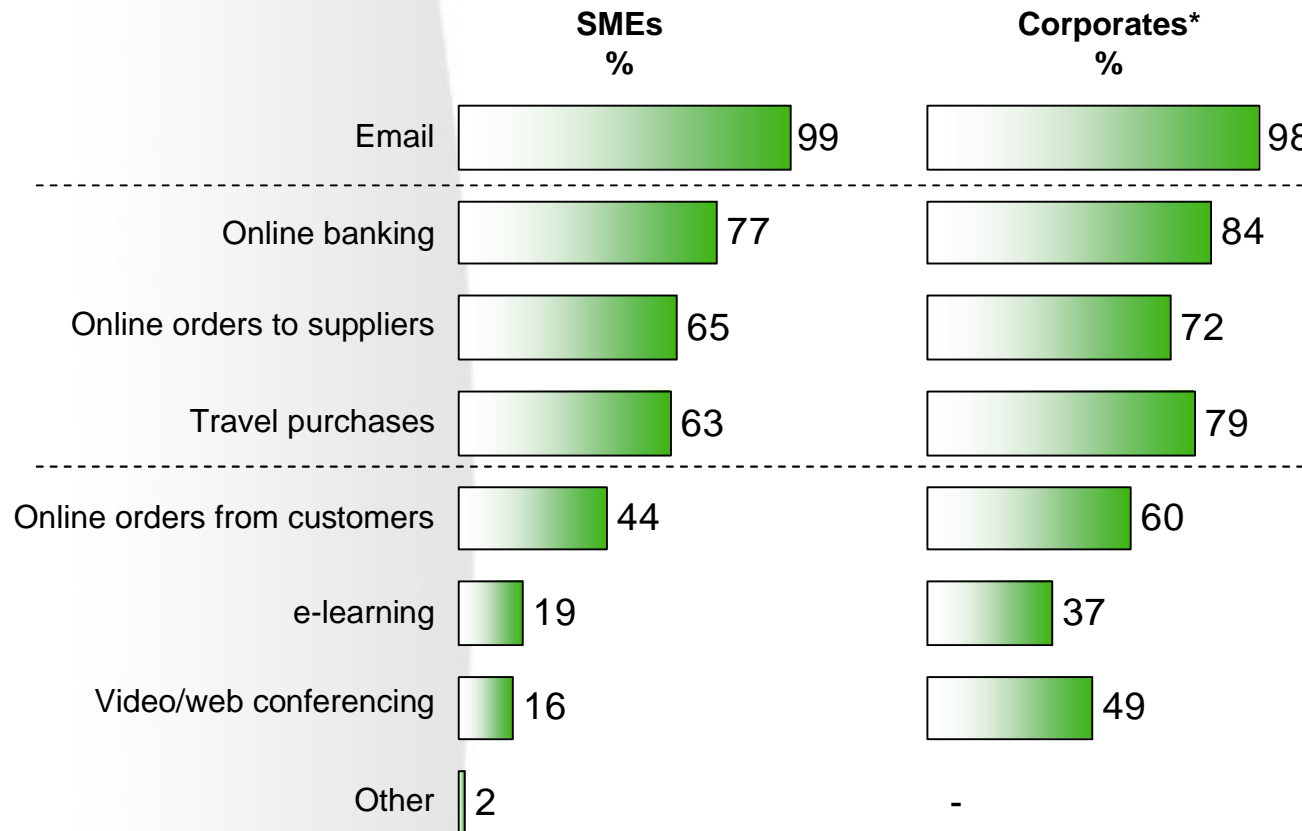
- Nearly a third of businesses with a narrowband only connection state that they are likely to get a broadband connection in the next 12 months.

Use of e-business Applications



Q. Does your company use any of the following e-business applications with your current internet connection?

NEW



- Email is used almost universally by businesses connected to the internet.
- Besides this application, the top 3 e-business applications used among both SMEs and Corporates are online banking, placing online orders to suppliers, and travel purchases.

Impact of Broadband on Business



Q. How has broadband impacted on your business?

(2 year gap)

(2 year gap)

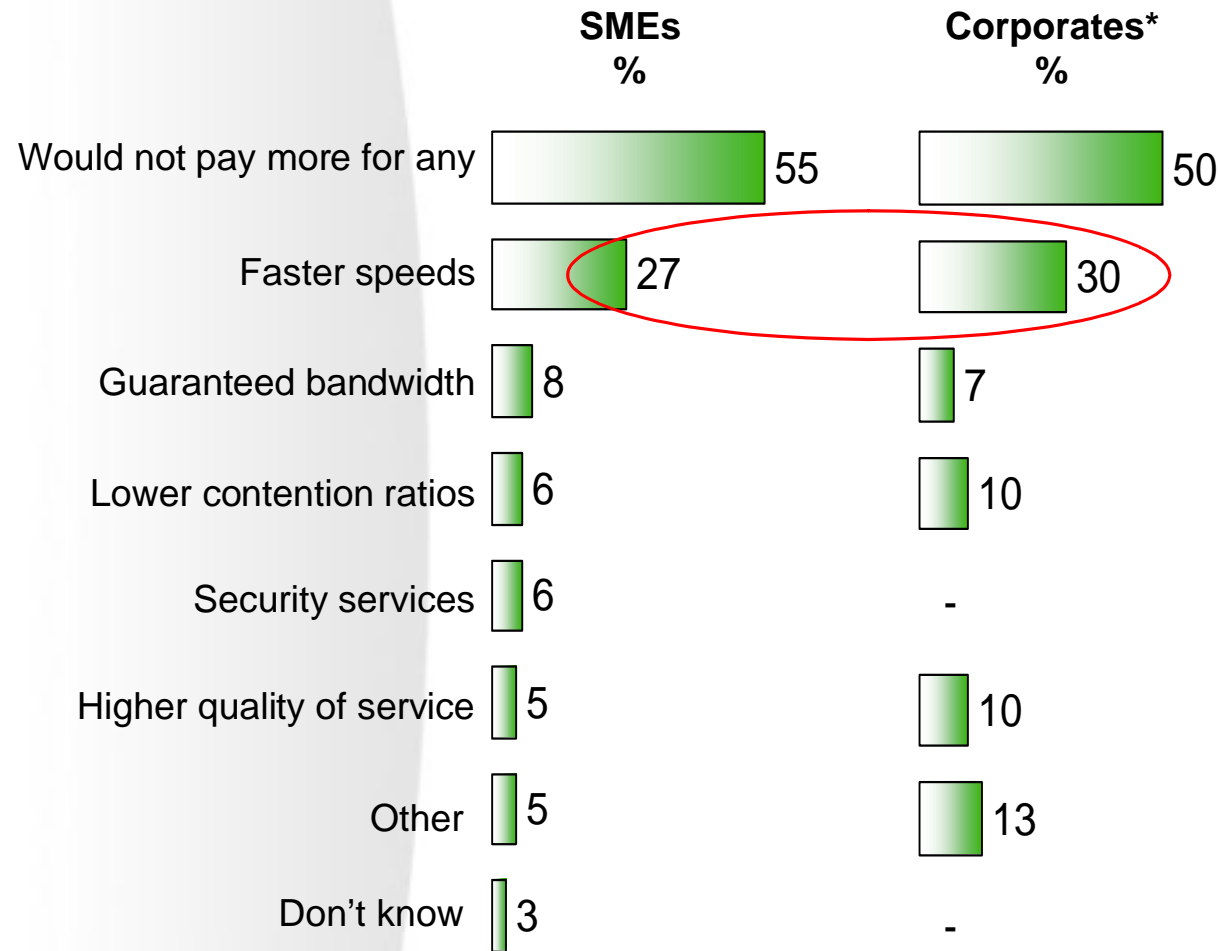
	SMEs H1'06 %	SMEs H2'06 %	SMEs H2'08 %	Corporates H1'06 %	Corporates H2'06 %	Corporates H2'08* %
Time savings	45	32	27	32	32	23
More efficient communications with customers	22	31	48	18	27	50
Productivity improvements	15	19	15	14	30	13
More efficient internal communications	15	15	-	8	34	-
IT cost savings	7	5	12	7	7	17
Has allowed us to use more advanced IT technology	2	5	-	3	2	-
Has made no difference to our business	-	9	6	-	11	-
Faster	-	4	2	-	4	-
Has helped increase sales	-	5	6	-	-	13
Increased Revenue	-	-	3	-	-	7
Allowed Teleworking	-	-	2	-	-	3
It has had a negative impact	-	-	2	-	-	-
Research, gather information	-	-	5	-	-	3
Essential tool	-	-	7	-	-	3
Other	-	2	7	-	2	10
Don't know	-	11	7	-	4	10

Improvement of Broadband Service



Q. What aspect(s), if any, of your broadband service would you be willing to pay more for than you currently do?

NEW



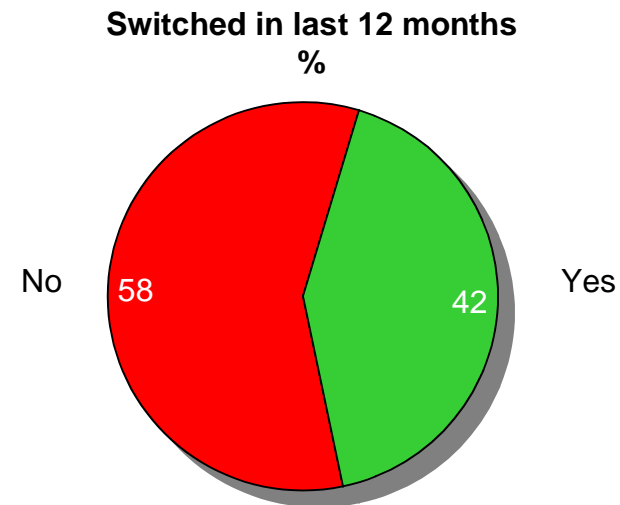
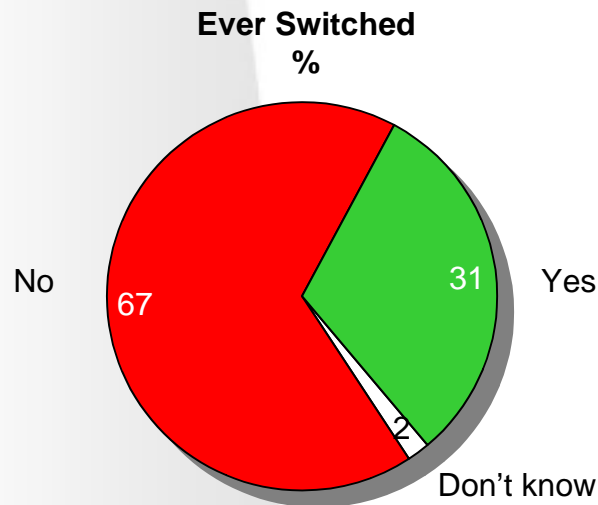
- Most businesses say they would not pay more for any aspect of their broadband service.
- Getting a faster speed connection however is the one aspect of their service that business would pay more for; just over one in four claiming they would.
- This is higher among businesses with 50 – 100 employees (36%).

Switching Broadband Provider



- Q. Has your company ever switched broadband provider?
Q. Did your company switch broadband provider in the last 12 months?

NEW



Yes - Higher Among:

Co. size 50-100	34%
Services sector	39%
Dublin based companies	37%
Ever switched fixed line	42%
Switched fixed line last 12 months	54%

Yes - Higher Among:

Co. size 1-9	49%
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Base: All Broadband Users (n=328, 30*)

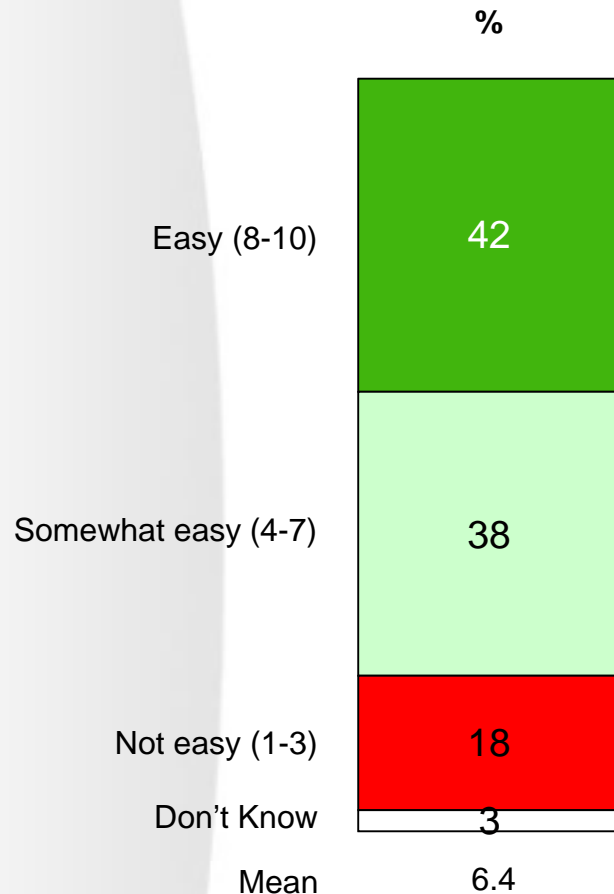
Base: All Who Switched Broadband Provider (n=103, 9*)

Ease of Switching Broadband Supplier



Q. How easy was the process of switching between broadband providers on a scale of 1 to 10 where 1 means not at all easy and 10 means extremely easy

NEW



- Just over four in ten found the process of switching broadband supplier easy (42%). This is lower than businesses rated ease of switching fixed line (57%), or mobile (56%) providers.

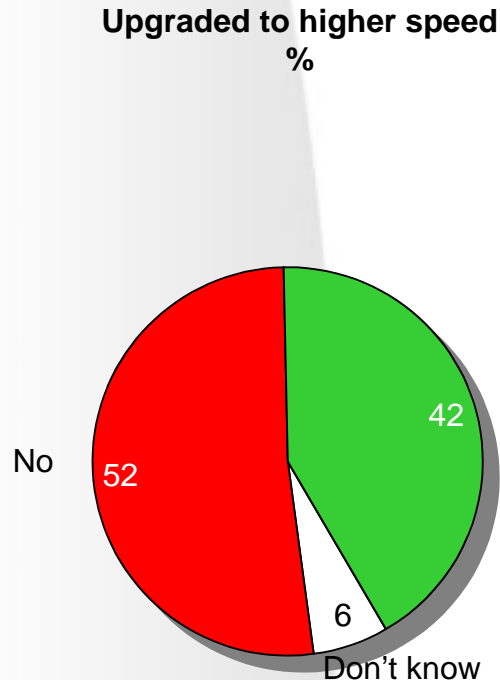
Base: All Who Ever Switched Broadband Provider (N=103, 9*)

Upgrade of Broadband Speeds

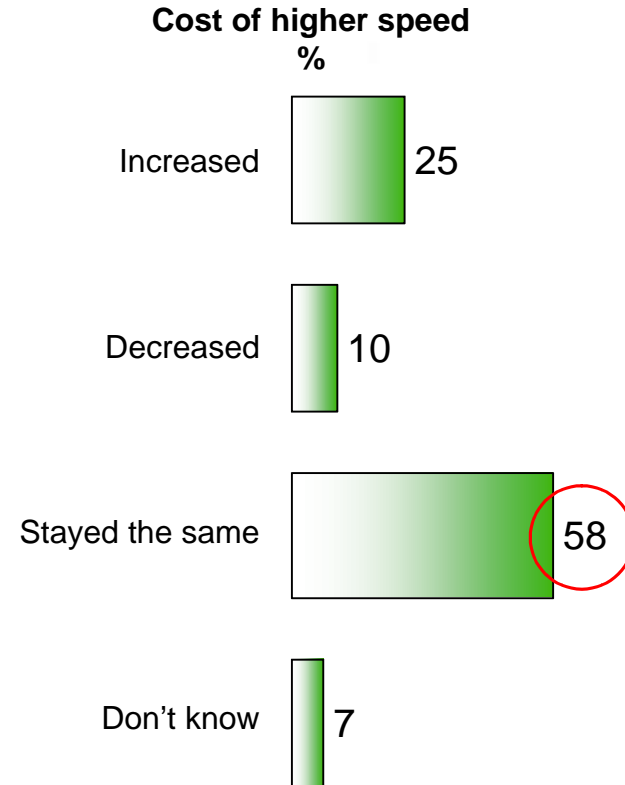


- Q. Was your company's broadband upgraded to a higher speed service in the last 12 months?
Q. Did the cost of your higher speed service increase, decrease or stay the same?

NEW



Yes →



Yes - Higher Among:

Manufacturing sector	50%
Dublin based businesses	53%
Ever switched internet supplier	47%

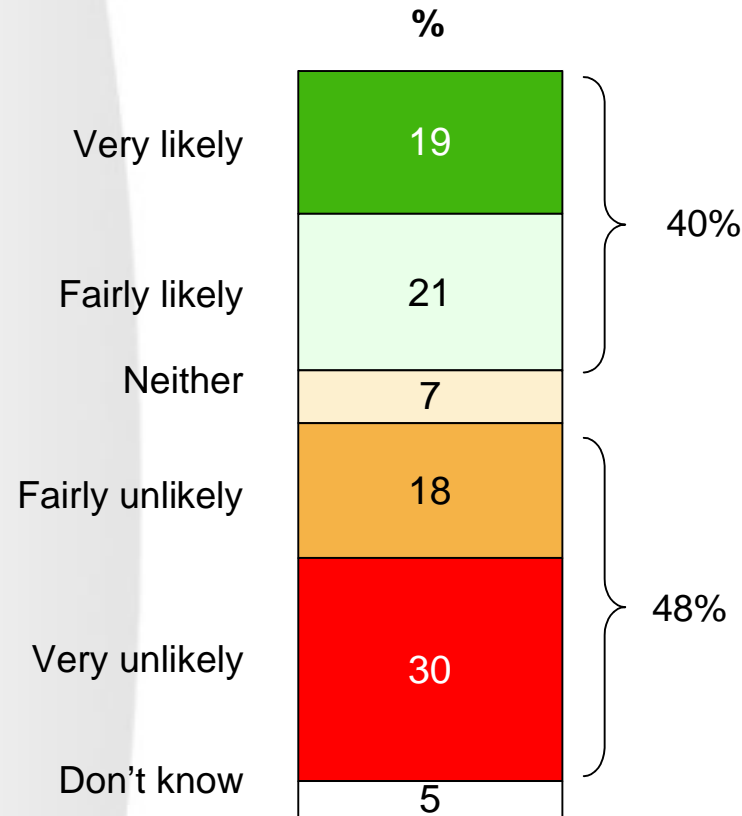
- Nearly six in ten businesses that had their speeds upgraded did not pay for the upgraded speeds. This is higher among smaller companies (1-9) (65%).
- It is also higher among businesses based in Dublin and the Rest of Leinster (64%)

Likelihood of upgrading broadband



Q. Is it likely that your company will upgrade to a higher speed broadband service in the next 12 months?

NEW



- Four in ten businesses think it likely that they will upgrade to a higher speed broadband service in the next 12 months.
- However, nearly half of businesses believe it unlikely; this is higher among businesses based in Munster (59%).

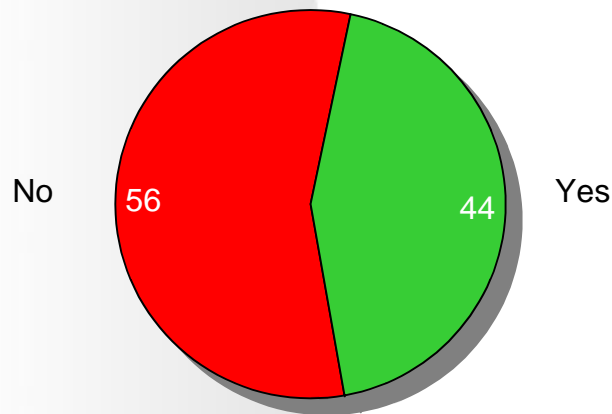
Broadband Speed Testing



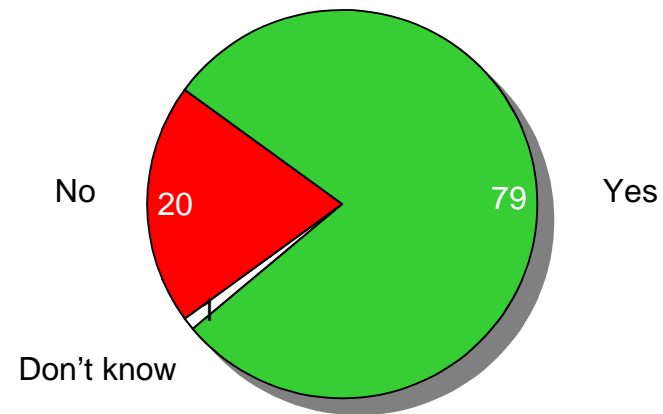
- Q. Are you aware of broadband speed testing software (e.g. speedtest.net)
Q. Have you ever carried out a broadband speed test on your work broadband connection?

NEW

Aware of Speed Testing software
%



Carried out a Speed Test
%



Yes - Higher Among:

Co. size 50-100	54%
Manufacturing sector	64%
Services sector	59%
Dublin based companies	61%

Yes - Higher Among:

Dublin based companies	89%
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Base: All Broadband users (n=328, 30*)

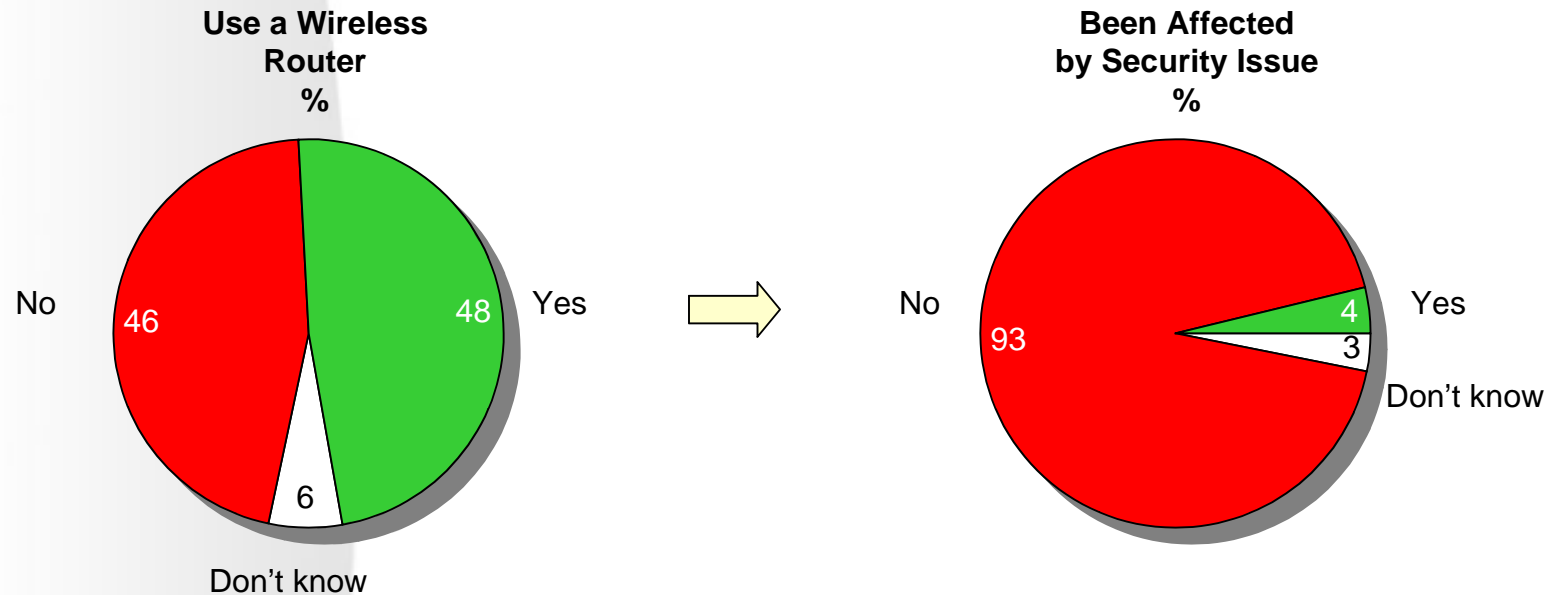
Base: All Aware of speed Testing Software (n=136, 22*)

Security of Wireless Router



- Q. Do you use a wireless router on your company broadband connection?
Q. Has your company been affected by security issues on its wireless router?

NEW



- While nearly half of broadband users use a wireless router, only a very small percentage claim to have been affected by security issues on the router.

Base: All Broadband users, excl. those using mobile broadband only (n=306, 38*)



Base: Using a Wireless Router (n=149, 17*)

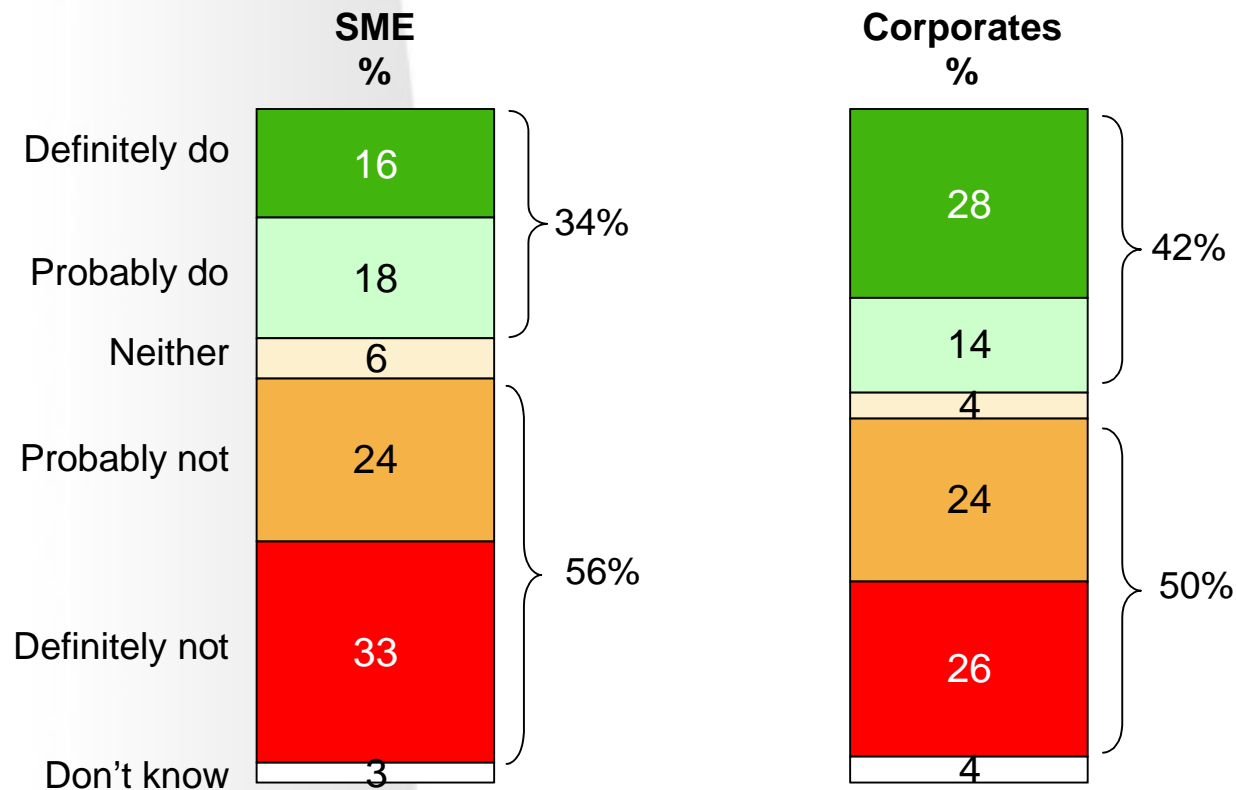
www.comreg.ie
*Caution small base size

Economic Outlook and ICT Spend



Q. Given the downturn in the Irish economy, do you foresee a reduction in your spend on information and communications technologies in the next 12 months?

NEW



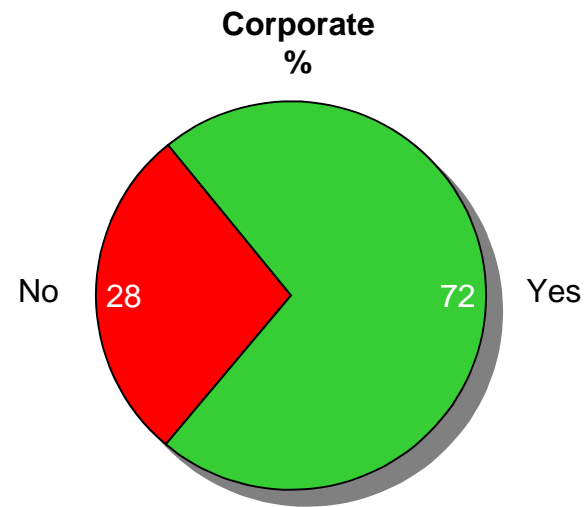
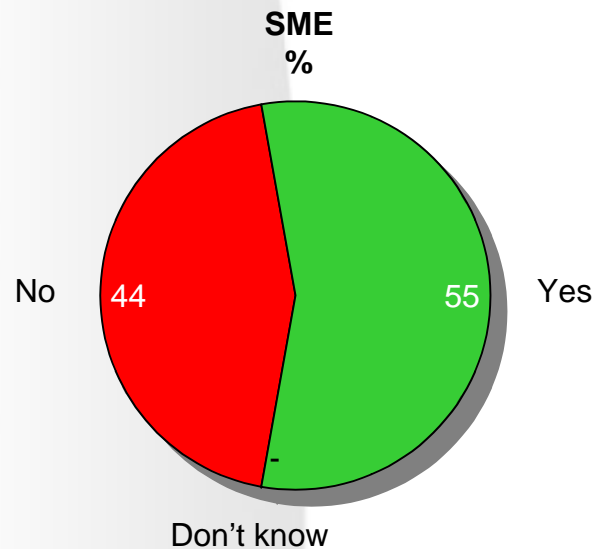
- Corporate businesses appear more likely to curb ICT spending as a result of the economic down turn than SMEs do. However, there are more Corporates that believe that they will not have to reduce spend, than say that they will have to.
- Overall, 35% of businesses foresee a decrease in ICT spend. This is higher among businesses in the Rest of Leinster (40%).

Awareness of ComReg's Role



Q. Are you aware that you can contact ComReg with regards to complaints that you have not been able to resolve with any of your fixed line phone, mobile phone, or internet service providers?

NEW



- Corporate respondents (72%) are more aware of ComReg's role with regards to unresolved complaints with ICT service providers, than SMEs are (55%).
- At an overall level, businesses in the manufacturing industry (67%), and those based in Dublin (71%) are more likely to be aware of ComReg's role in this regard.

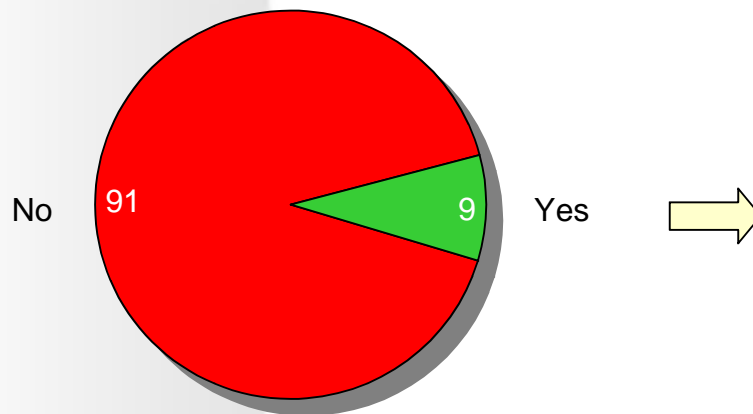
Have Contacted ComReg with Regards to Complaint



NEW

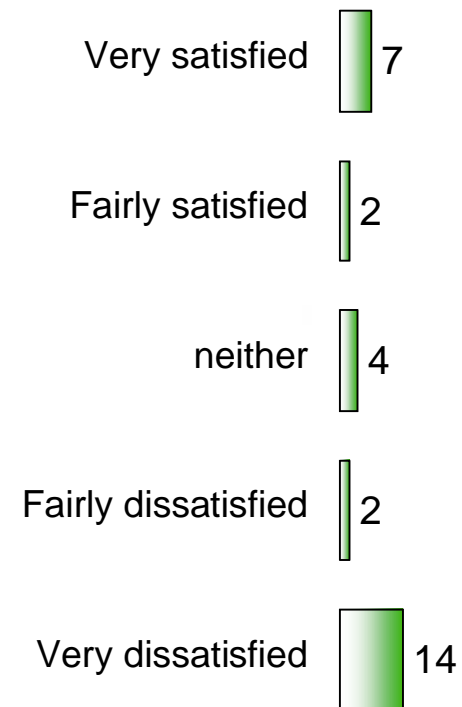
- Q. Have you contacted ComReg in the last 12 months with regard to complaints that you have not been able to resolve with any of these service providers?
- Q. How satisfied were you with the outcome of this contact?

Contacted ComReg with Complaint %



Satisfaction with Resolution

Number of Responses*



Base: All Aware of ComReg role in complaint resolution (n=277, 36*)

Base: All contacted ComReg (n=23*, 6*)



Commission for
Communications Regulation

Key Findings

Key Findings - Fixed



- At an overall level, Eircom's share of the fixed line market has dropped again in this wave of research, driven by SMEs using providers other than Eircom. The main reasons businesses provided for choosing their current fixed provider were value for money or that they have always used their current provider.
- The number of businesses switching fixed line provider in the last 12 months appears to have slowed somewhat since 2006. However, there are still over a third of businesses who have done so in this timeframe.
- Over half of businesses that have ever switched fixed line provider, had switched back to their original supplier. The process of switching is seen as being easy by the majority of businesses, so these levels of switching back are not surprising. As economic conditions become more trying, businesses could start to look to other suppliers for better deals. As there is a perception that switching is not difficult, businesses may be more likely to switch again to avail of these deals.
- Of businesses who moved premises and attempted to take their fixed line telephone number with them, a third experienced problems, most notably a delay in the transfer of the numbers, or not being able to keep their original telephone numbers at all.

Key Findings - Mobile



- Business use of mobile telephones is near ubiquitous among Corporate businesses, and has increased again among SMEs in this wave of research. Vodafone and O2 continue to be the mobile companies most used by businesses. Businesses with less than 10 employees are the least likely to provide company mobile phones.
- As was seen in the fixed line market, about a third of respondents claim to have switched mobile provider in the last 12 months, most notably smaller businesses. While ease of switching was at similar levels as seen in the fixed line market, it was seen as especially easy by smaller businesses (1-9 employees).
- As could be expected, Corporate businesses are more likely to provide their employees with mobile data devices than SMEs are; half of SMEs do not provide devices for mobile working and are more likely to state that they do not need devices for mobile working.
- It follows then that higher numbers of Corporate businesses use data roaming more frequently than SME businesses do, and while dissatisfaction with these prices is high overall, it is especially high among Corporate data roamers. In fact, among all businesses, besides lack of requirement, expense of data roaming is the main reason given for not encouraging data roaming among employees.

Key Findings – Internet & Broadband



- There is a small percentage of businesses that are not connected to the internet, most notably SMEs. Overall, Eircom remains the main provider of internet services to businesses in Ireland.
- A higher percentage of businesses have switched Internet Service Provider in the last 12 months, than had switched fixed or mobile operator. However, the ease of switching was not rated as highly as it was for fixed or mobile.
- The use of narrowband connections among businesses is minimal, and these are not considered the main means of accessing the internet for the most part. Of the remaining narrowband users, a third of businesses state they are likely to get a broadband connection in the next 12 months.
- Of those using the internet, besides email, online banking, orders to suppliers and travel purchases are the main uses of the internet. Broadband users are most likely to say that the way broadband has impacted on their business is by providing a more efficient means of communication with customers, and to a lesser extent providing time savings.
- While it is generally considered among businesses that they would not pay more for any aspect of their broadband service than they currently do, over one in four said they would pay for faster speeds – this was the same for SME and Corporate businesses.
- Nearly six in ten businesses that had their broadband speeds upgraded in the past year, and their monthly costs for this upgrade stayed the same. As broadband providers begin to introduce higher speed packages, are they automatically upgrading customers on lower speed packages?
- Four in ten broadband users consider it likely that they will upgrade the speed of their broadband connection in the next 12 months. Businesses seem generally aware about broadband speeds, as just over 2 in 5 are aware of speed testing software, and are therefore likely to be more aware of whether or not they would require, and be likely to get, faster speeds in the next year.



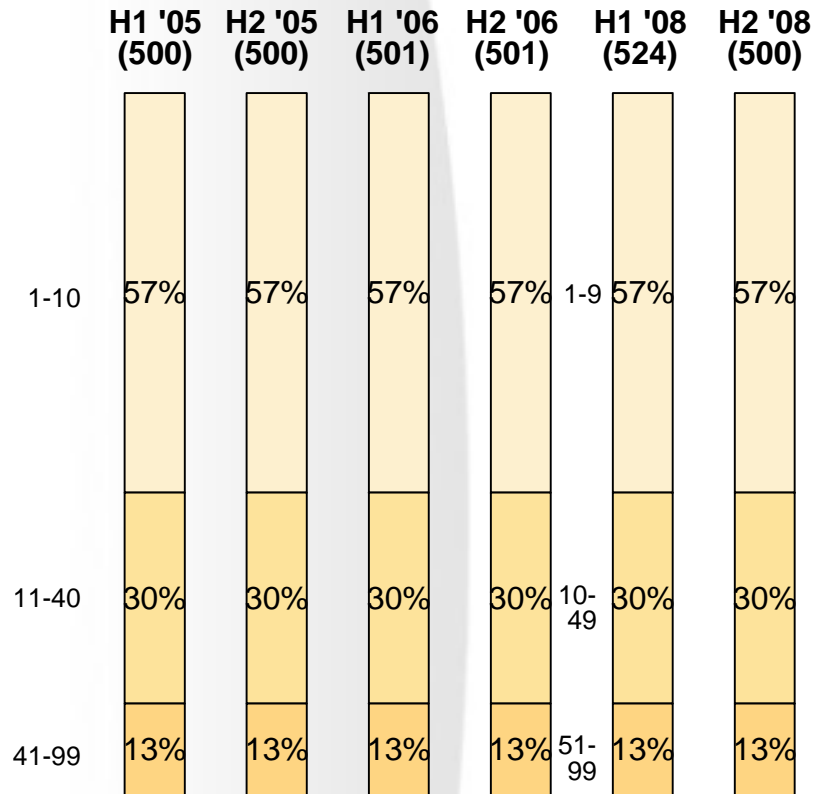
Commission for
Communications Regulation

Appendix: Sample Details

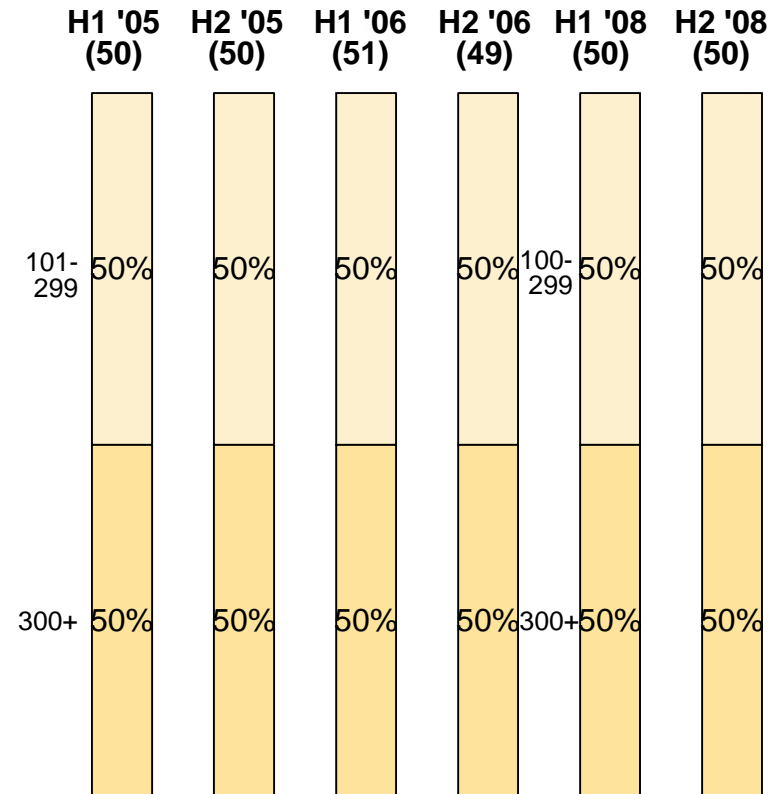
Sample Profile – Number of Employees



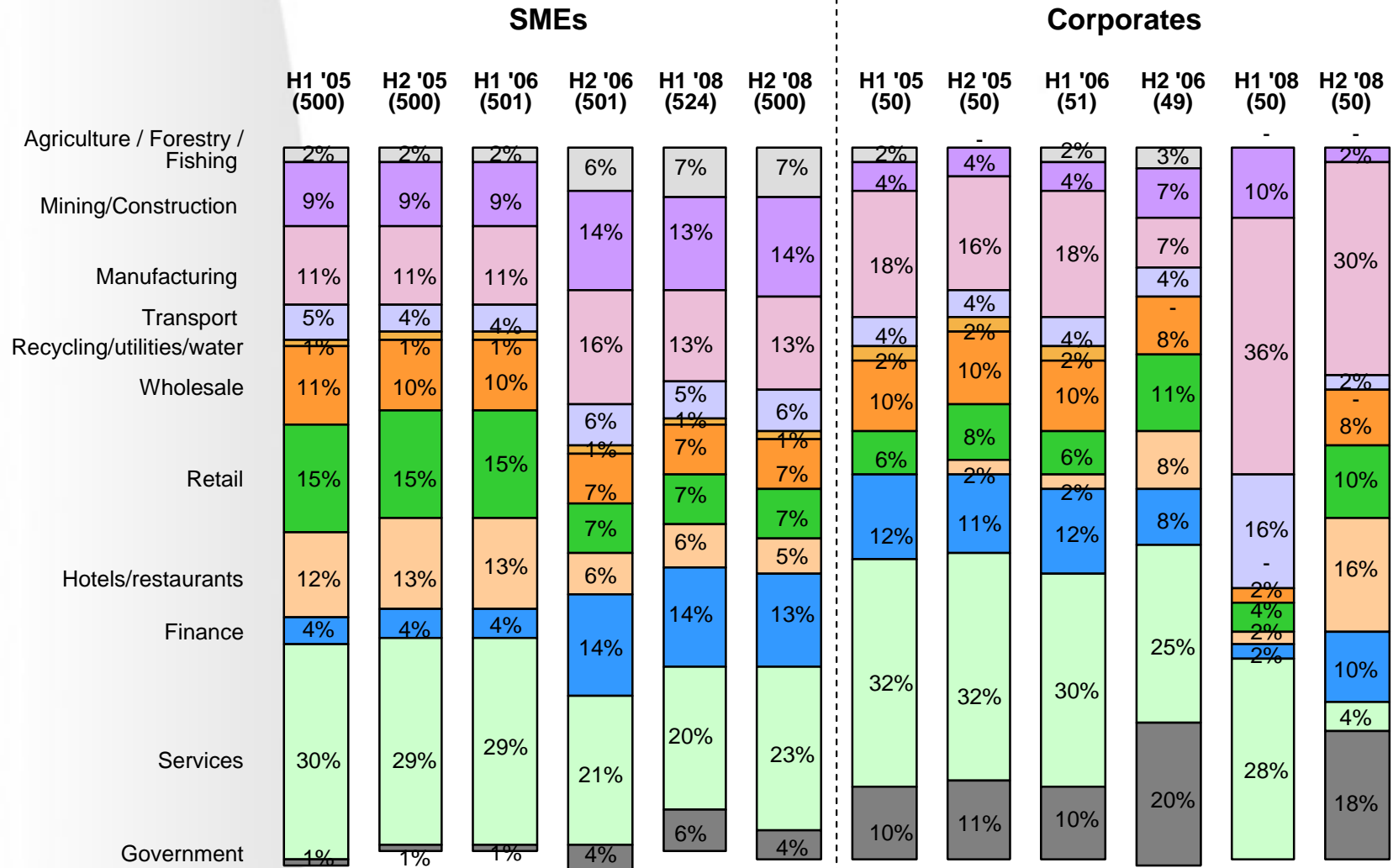
SMEs



Corporates



Sample Profile – Industry Sector



Sample Profile: Location of Business



Q. What region is your workplace in?

	SMEs						Corporates					
	H1 '05 %	H2 '05 %	H1 '06 %	H2 '06 %	H1 '08 %	H2 '08 %	H1 '05 %	H2 '05 %	H1 '06 %	H2 '06 %	H1 '08 %	H2 '08 %
Dublin City	29	30	24	25	28	30	38	42	40	52	57	30
Rest of Leinster	25	20	24	28	24	26	16	14	14	10	18	28
Cork City	5	9	5	9	7	6	12	2	4	4	8	12
Waterford City	3	1	1	1	1	2	-	-	7	8	-	-
Limerick City	3	4	4	1	3	2	2	2	4	3	-	2
Rest of Munster	15	19	24	17	17	19	24	17	15	15	10	18
Galway City	4	3	2	1	3	2	-	2	5	4	2	-
Rest of Connaught	10	9	10	10	11	8	4	12	9	3	4	6
Rest of Ulster	6	4	5	7	5	5	4	9	2	1	2	4

Sample Profile: Location of Premises



Q. Is your company located in....

	SMEs					Corporates				
	H2 '05 %	H1 '06 %	H2 '06 %	H1 '08 %	H2 '08 %	H2 '05 %	H1 '06 %	H2 '06 %	H1 '08 %	H2 '08 %
A large town or city	39	32	31	39	35	46	41	55	61	32
A small or mid-sized town	20	25	20	18	19	15	19	6	11	28
A rural area or village	20	23	28	22	22	5	2	13	6	14
A business park in urban area	17	16	18	15	20	27	30	24	18	20
A business park in a rural area	3	2	3	5	4	4	6	2	2	4

Sample Profile: Type of Company



Q. Is your company?

	SMEs						Corporates					
	H1 '05 %	H2 '05 %	H1 '06 %	H2 '06 %	H1 '08 %	H2 '08 %	H1 '05 %	H2 '05 %	H1 '06 %	H2 '06 %	H1 '08 %	H2 '08 %
An Irish owned – private company	89	86	83	85	81	86	40	35	36	32	35	42
An Irish owned – public company	3	3	3	3	5	2	8	3	11	10	16	4
A Subsidiary of overseas company	6	3	4	5	6	6	30	30	24	24	26	30
A Semi-State body	1	2	1	*	*	1	10	10	7	3	8	2
A Government department	1	2	2	3	3	1	10	18	11	20	10	16
Other	*	3	6	5	5	4	-	2	11	10	4	4

Sample Profile: Position in Company



Q. What is your own position in the company?

	SMEs						Corporates					
	H1 '05 %	H2 '05 %	H1 '06 %	H2 '06 %	H1 '08 %	H2 '08 %	H1 '05 %	H2 '05 %	H1 '06 %	H2 '06 %	H1 '08 %	H2 '08 %
IT Manager /IT Director	7	11	6	8	10	9	46	46	44	68	54	44
CEO/Managing Director / Owner Manager	45	36	38	48	47	48	2	-	6	3	4	4
Telecommunications Director/ Telecommunications Manager	1	2	*	1	*	2	4	11	-	5	4	8
Finance Director/ Finance Manager	8	11	5	9	8	8	8	9	6	6	12	10
Other Director/Manager	23	24	19	21	25	21	26	12	10	12	18	22
Administration	10	9	9	9	7	5	-	4	-	4	2	2
Other	5	7	22	4	2	7	4	19	35	4	6	8
Refused	1	1	*	-	-	-	-	-	-	-	-	2

*Other answers being coded

Main Fixed Line Supplier



Q. Which fixed line phone services provider does your company use for its voice calls?

	SME						Corporates					
	H1 '05 %	H2 '05 %	H1 '06 %	H2 '06 %	H1 '08 %	H2 '08 %	H1 '05 %	H2 '05 %	H1 '06 %	H2 '06 %	H1 '08 %	H2 '08 %
Eircom	79	80	77	76	75	70	82	77	88	77	68	78
Imagine ¹	1	1	1	4	10	8	1	1	1	3	4	8
BT Ireland	6	8	6	5	7	7	8	14	4	10	12	10
Access	3	2	5	2	n/a	n/a	8	2	-	2	n/a	n/a
Pure Telecom	1	2	1	1	1	1	2	-	2	2	2	-
Verizon (MCI Worldcom) ²	2	1	*	1	1	-	4	-	4	-	2	2
NewTel ³	1	*	1	1	1	n/a	-	-	-	-	-	n/a
Cinergi/Speedial	1	*	1	1	n/a	-	-	-	-	-	n/a	-
NTL Business/NTL	1	*	*	-	*	-	-	2	6	2	6	-
Euphony	-	-	-	-	-	1	-	-	-	-	-	-
IFA	-	-	-	-	-	1	-	-	-	-	-	-
Smart	-	-	-	-	-	1	-	-	-	-	-	-
None	-	-	-	-	-	3	-	-	-	-	-	-
Other*	5	5	7	7	4	8	-	2	8	12	6	2
Don't know/refused	1	2	2	3	2	-	-	2	-	4	-	-

Base: All Respondents

1 Imagine includes Access, Cinergi, Gaelic Telecom

2 Verizon previously MCI Worldcom

3 NewTel has since been acquired by Pure Telecom

*Note: Answers under 1% not shown

Main Internet Supplier Used



Q. What is the main company that supplies your business internet connection?

	Total						SMEs						Corporates					
	H1 '05 %	H2 '05 %	H1 '06 %	H2 '06 %	H1 '08 %	H2 '08 %	H1 '05 %	H2 '05 %	H1 '06 %	H2 '06 %	H1 '08 %	H2 '08 %	H1 '05 %	H2 '05 %	H1 '06 %	H2 '06 %	H1 '08 %	H2 '08 %
Eircom	66	69	70	66	58	60	66	72	73	68	61	61	61	46	54	47	29	53
BT Ireland (Esat BT)	7	7	6	6	9	10	6	6	6	5	9	9	16	12	1	14	16	15
Imagine Group ¹	n/a	n/a	n/a	n/a	4	6	n/a	n/a	n/a	n/a	4	7	n/a	n/a	n/a	n/a	2	4
Magnet/Leap/Netsource	n/a	n/a	n/a	n/a	3	3	n/a	n/a	n/a	n/a	3	3	-	-	-	-	10	-
Irish Broadband	3	4	5	4	3	n/a	4	4	5	4	3	-	2	4	4	7	2	-
DigiWeb	1	1	1	2	2	2	1	1	1	2	2	2	-	-	-	-	-	2
NTL/Chorus/UPC	1	1	2	1	1	1	1	1	1	*	1	1	-	2	7	3	4	-
Verizon (MCI Worldcom)	1	*	*	1	1	1	1	*	*	*	*	*	2	2	-	5	2	4
Smart Telecom	1	*	1	1	1	1	1	*	1	1	1	1	-	-	3	2	4	2
UTV Internet	1	1	*	1	*	*	1	1	1	1	*	-	-	-	-	-	-	-
Perlico	-	*	-	1	*	*	-	*	-	1	*	-	-	-	-	-	*	-
Vodafone	-	-	-	-	-	1	-	-	-	-	-	1	-	-	-	-	-	-
3 Ireland	-	-	-	-	-	1	-	-	-	-	-	1	-	-	-	-	-	-
Pure Telecom	-	-	-	-	-	1	-	-	-	-	-	1	-	-	-	-	-	-
Interfusion	-	-	-	-	-	1	-	-	-	-	-	-	-	-	-	-	-	2
Last Mile	-	-	-	-	-	1	-	-	-	-	-	1	-	-	-	-	-	-
Other*	7	9	9	13	11	11	6	7	8	11	10	13	10	26	16	24	20	15
Don't know	6	6	6	8	6	-	6	5	4	8	6	-	4	8	16	11	10	-

Ease of Switching Supplier



Q. How easy was the process of switching between providers on a scale of 1 to 10 where 1 means not easy at all and 10 means extremely easy?

