



ICT Business Survey (SME Market)

Reference: ComReg 15/123b



REDC

Background and objectives



- / The Commission for Communications Regulation (ComReg) wished to conduct an ICT survey of the SME business market in Ireland.
- / The purpose of the research is to access the following:
 - Access and Usage of ICT services
 - Understand behavioural change in ICT usage over time
 - Gauge awareness of cost of services and speed of satisfaction with service received
 - Establish price sensitivity in the market
 - Establish incidence of bundling and switching in the Irish Business Market

Methodology



- / 500 interviews were conducted by telephone among a nationally representative sample of SME businesses operating in Ireland.
- / Interviews were quota controlled by industry sector/company size and region in order to accurately represent the correct profile of Irish business.
- / Disproportionate interviewing conducted in small and micro sector to allow for analysis within these sectors. Final sample weighted to known distribution of company size.

Company Size	Number of Interviews Conducted	Weighted Representative Sample
Micro (1-10 Employees)	340	420
Small (11-50 Employees)	110	70
Medium (50-250 Employees)	50	10

- / Results are analysed by 3 core geographic regions – Dublin/Urban less Dublin and Rural. A rural area is defined as an area with a population of 5,000 or less.
- / All interviews were conducted via CATI telephone interviewing .
- / Fieldwork was conducted between 18th June – 16th July 2015.
- / Interviews were conducted with the person responsible for telecommunication decision making within each business.



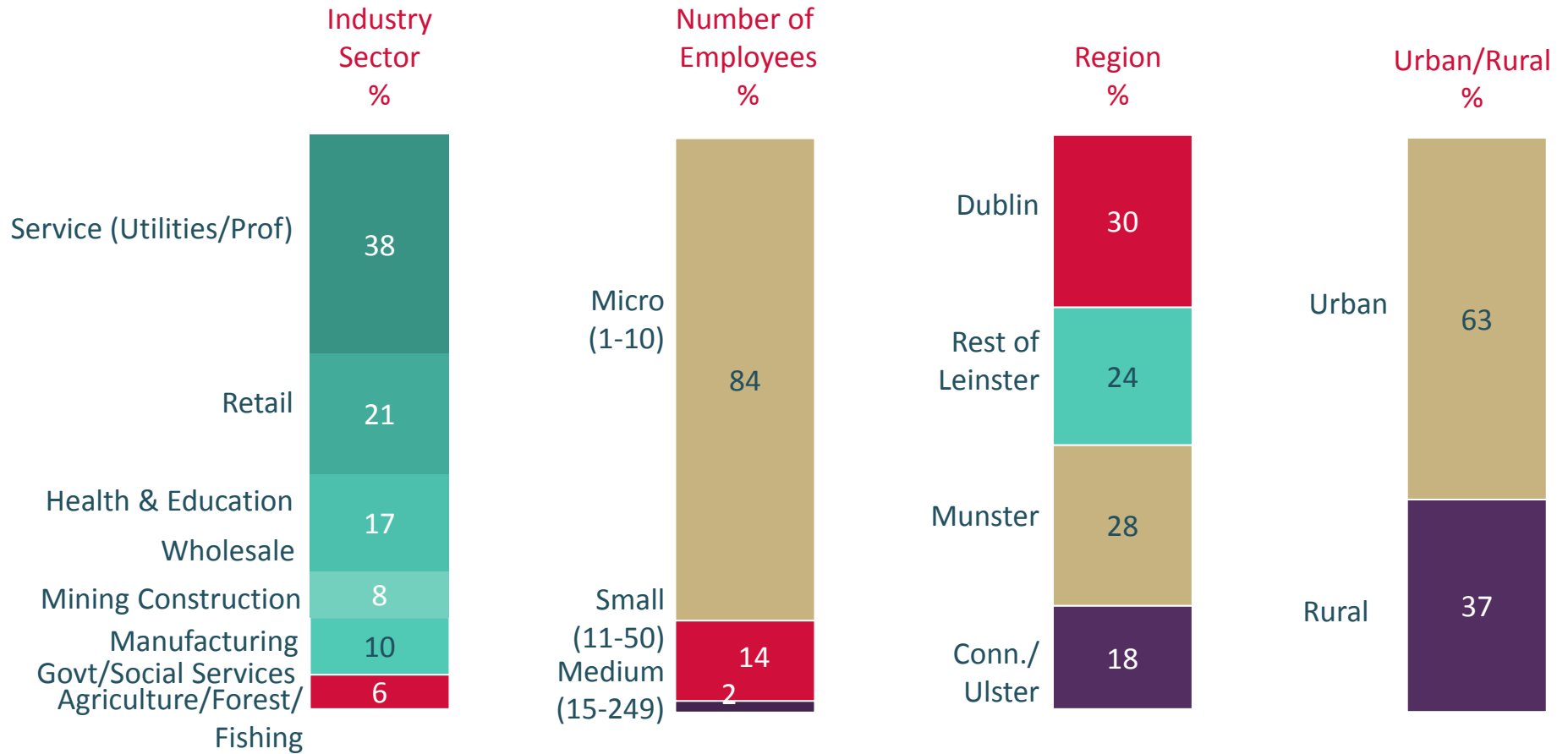
Notes on presentation



- / Comparisons with results from the 2013 ICT Business Survey have been made where questions were phrased in exactly the same or very similar way to questions asked in 2013 survey.
- / Throughout the presentation (*) is used to denote sample sizes of a small base or a result less than 1%. Results based on small sample sizes are indicative only and do not stand to statistical scrutiny.
- / Some percentages shown will add to 99% or 100% this is due to rounding at the data analysis stage.

Sample profile

(Base: All Business – 500)



Sample is weighted to reflect the SME market of Irish business.



Presentation structure

Key Findings	7
Telecommunications and Social Media Usage	14
Bundles	20
Landline Telephone Service	29
Mobile Phone	43
Fixed Broadband	56
Mobile Broadband	75
Cost Awareness & Overcharging	87





Key Findings

Key Findings – Telecommunications and Media Usage

Business Mobile Phone

Ownership rate – 75%

Mobile Broadband

18% of businesses have access to mobile broadband down from 21% in 2013

Landline

92% have access to landline service up from 86% in 2013

Business Access



To
Telecommunications
and Social Media

Non-Broadband Business

6% of businesses do not access any broadband service compared to 20% in 2013.

Fixed Broadband

91% have access to Fixed Broadband up from 73% in 2013

Social Media

68% of SME's use social media for business purposes – Facebook most popular with 55% of respondents using Facebook for business purposes.

Key Findings - Bundles

Broadband + Landline

Most popular bundle type – **74%** of all bundles are broadband and landline.

Bundle Ownership



64%

Intention to Switch

26% of bundle owners intend to switch service provider within the next 12 months.

Broadband/Landline & Mobile Phone

Popularity of this bundle type has risen from **4%** of all bundles in 2013 to **18%** of all bundles in 2015.

Switching

45% of bundle owners switched their service provider in order to avail of current service.

Key Findings – Landline Telephone Service

Largest providers of landline telephone service in 2015

Eircom – 52% (63% in 2013)
Vodafone – 27% (20% in 2013)
Three – 4% (4% in 2013)
Imagine – 4% (6% in 2013)

Satisfaction with landline service providers

Nationally – 72%
(down from 77% 2013)

Landline Ownership



92%

Landline - Usage

14% of landline owner claim to have landline to facilitate access to broadband

Switching

47% have previously purchased landline service from another provider.

Length of Time with Supplier

35% have been with landline supplier for less than 12 months – up from 18% in 2013

Key Findings – Mobile Phone

Largest providers of mobile telephone service in 2015

Vodafone – **51%** (54% in 2013)

Three Group – **28%** (34% in 2013)

Eircom Group Mobile – **20%** (12% in 2013)

Satisfaction with mobile phone service providers

71% in 2015 up from **69%** in 2013

Mobile Phone Ownership



75%

Social media usage

55% use business mobile phone for Social Media.

Switching

50% have been with the same mobile phone service provider for longer than 3 years.

49% had previously purchased mobile service from a different service provider.

23% likely to switch mobile supplier next 12 months

Key Findings – Fixed Broadband

Largest providers of fixed broadband service in 2015

Eircom – 47% (55% in 2013)
Vodafone – 25% (21% in 2013)
UPC – 6% (5% in 2013)
Three Group – 4% (7% in 2013)

Satisfaction with fixed broadband service providers

69% in 2015 up from 66% in 2013

Fixed Broadband Ownership



91%

Fixed Broadband - Usage

Fixed broadband service is most commonly used for browsing Internet/using email.

15% of respondents use VoIP services at least several times per week.

Switching

33% have been with the same broadband supplier for longer than 3 years.

43% had previously purchased broadband service from another provider.

25% intend to switch supplier in the next 12 months – down from 26% in 2013.

Key Findings – Mobile Broadband

Largest providers of mobile broadband service in 2015

Vodafone – 47% (33% in 2013)

Three Group – 29% (31% in 2013)

Eircom Group Mobile – 20% (16% in 2013)

Satisfaction with Mobile Broadband Suppliers

60% in 2015 up from 56% in 2013.

Mobile Broadband Ownership



18%

Mobile Broadband - Usage

Mobile broadband service is most commonly used for browsing Internet/using email. 77% use mobile broadband for teleworking.

Switching

41% have been with the same mobile broadband service provider for longer than 3 years.

34% had previously purchased broadband service from another provider.

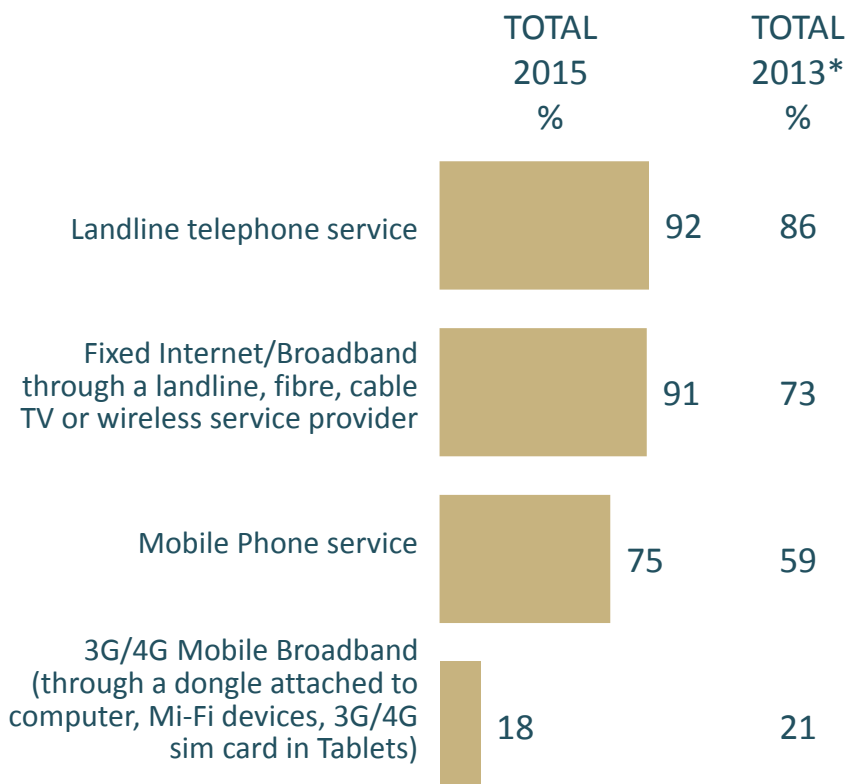
26% intend to switch supplier in the next 12 months – down from 25% in 2013.



Telecommunications and Social Media Usage

Telecommunication services used for business purposes

(Base: All Decision Makers – 500)



Area -2015				Company Size -2015		
Total Urban (313) %	Dublin (155) %	Urban Less Dublin (165) %	Rural (187) %	Micro (420) %	Small (70) %	Medium (10) %
92	88	93	91	90	99	99
94	94	93	86	90	97	99
79	81	78	68	73	84	87
19	19	20	15	16	26	31

(* - question wording slightly changed from 2013)

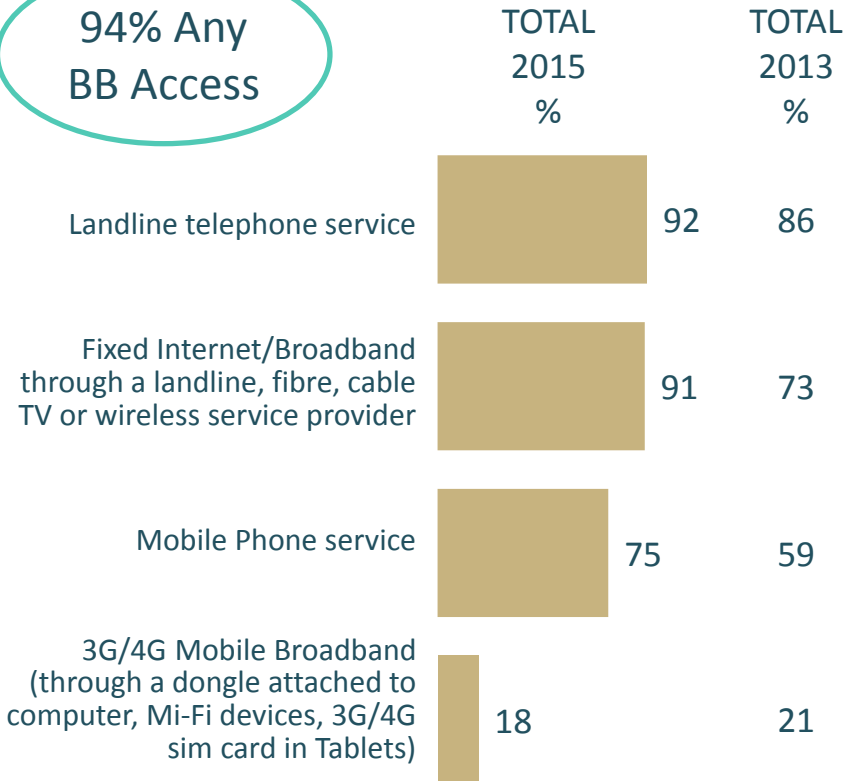
Significant rise in usage of fixed broadband and mobile phone services for business purposes since 2013.



Telecommunication services used for business purposes

(Base: All Decision Makers – 500)

94% Any BB Access



Sector - 2015					
Agriculture/Forestry/Fishing/Min ing/Construct (50) %	Manufacturing (30) %	Services (Incl Utilities And Professional) (190) %	Retail (105) %	Wholesale (40) %	Health Education Public Admin (85) %
83	100	87	97	97	95
82	93	89	91	92	100
97	65	75	67	86	71
23	20	16	16	16	20

Fixed broadband usage is universal in Manufacturing sector. On the other hand, usage of mobile phone service for business purposes is lowest in Manufacturing sector as well as retail sectors.

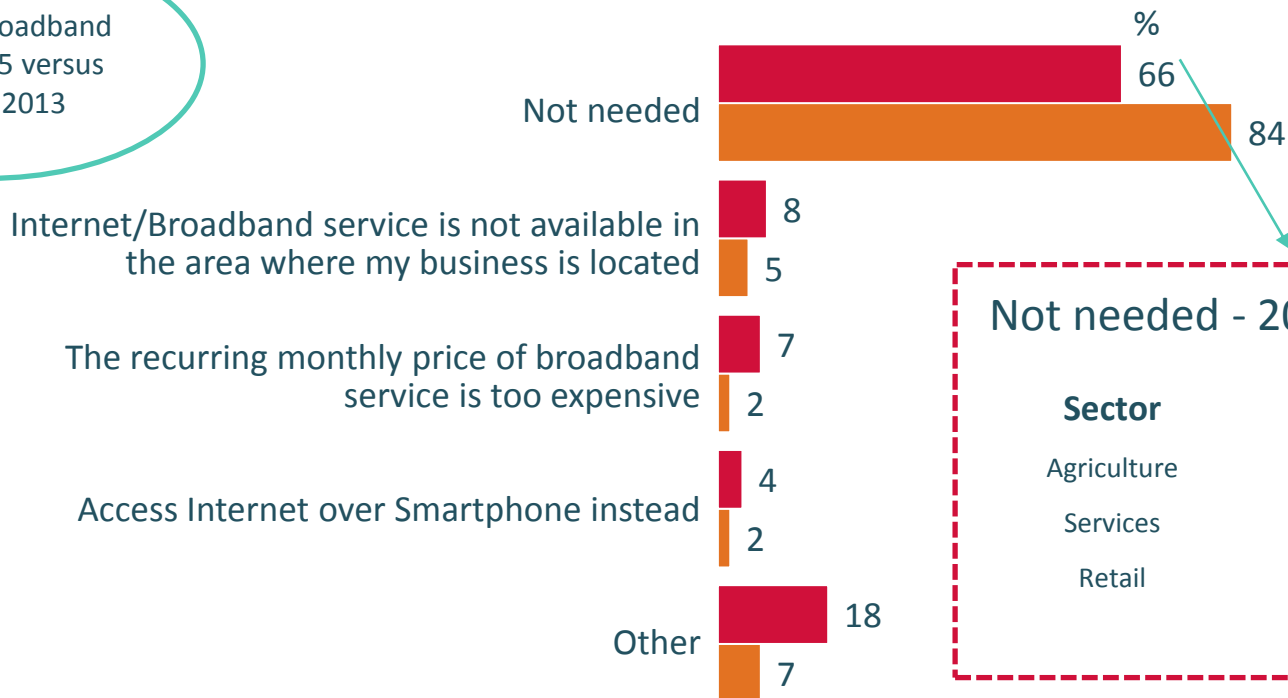


Reasons for not using broadband for business purposes

(Base: All Non-broadband Users -28*)

TOTAL 2015 (n=28)
TOTAL 2013 (n=101)

6% Non Broadband Users 2015 versus 20% in 2013



Not needed - 2015 (n=28)*

Sector	%
Agriculture	46
Services	67
Retail	57

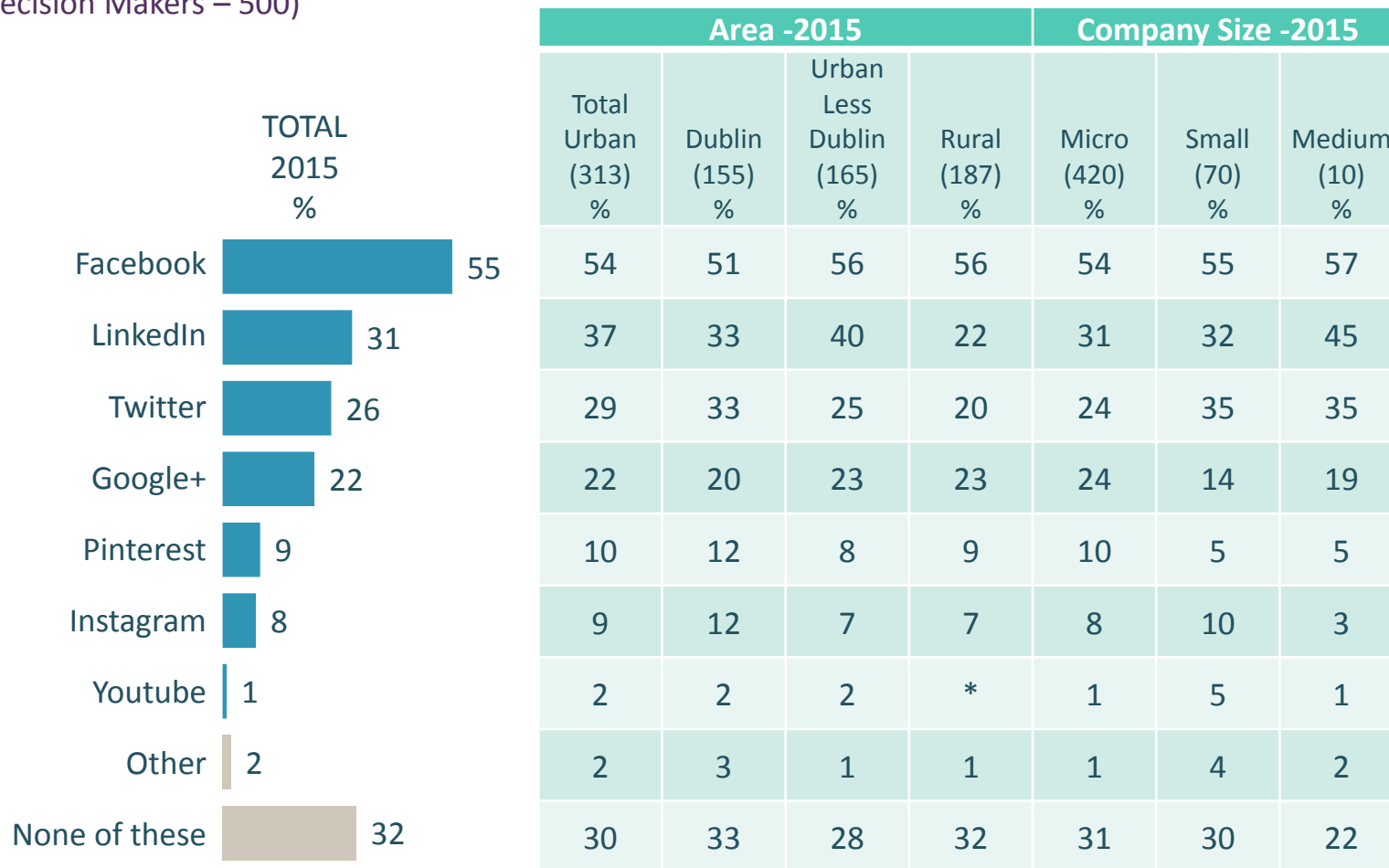
(*Small base -28)

The main reason why businesses are not using broadband services is simply because they don't need it.



Social media channels used for business purposes

(Base: All Decision Makers – 500)

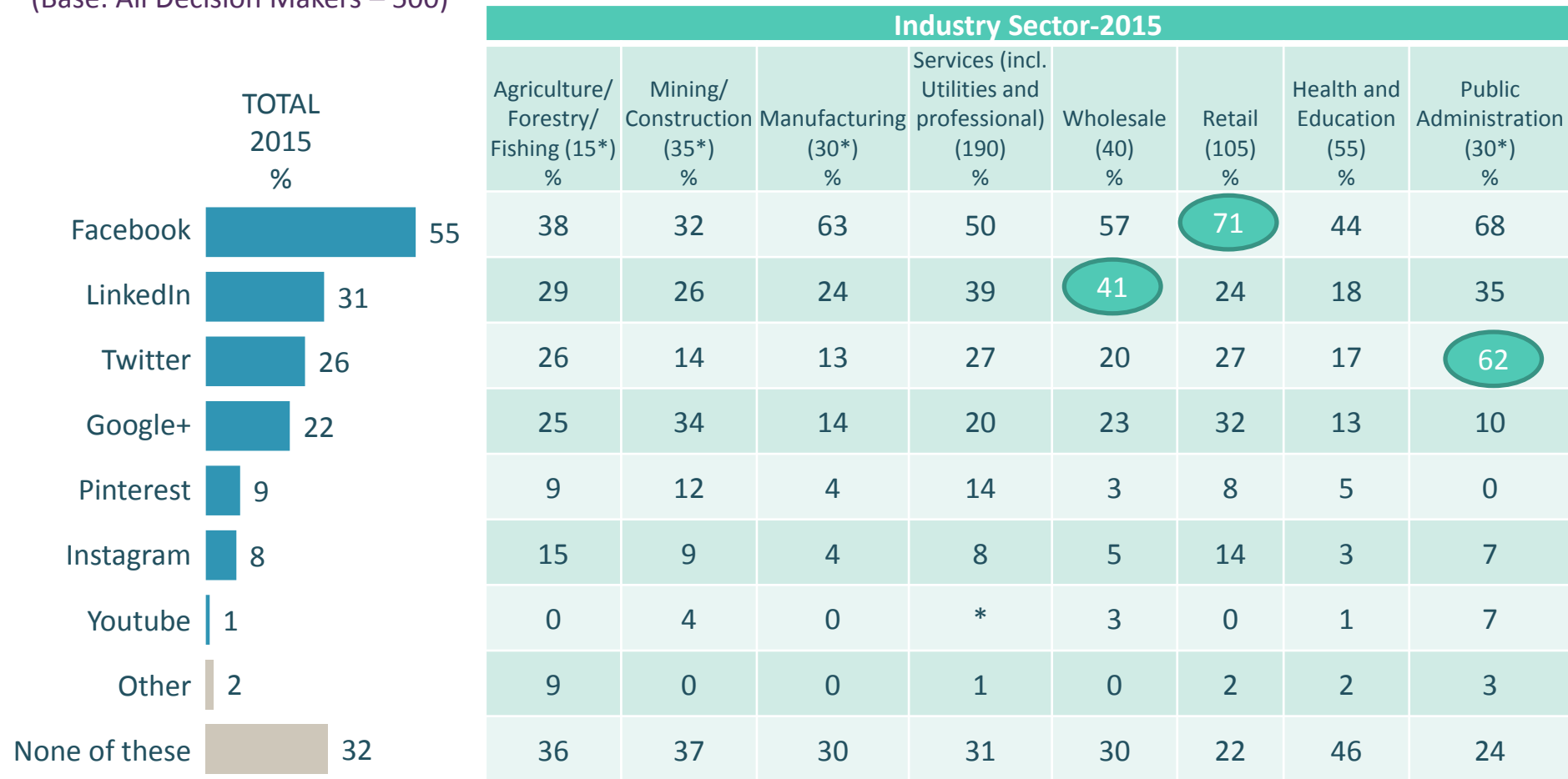


Facebook is most likely social media channel used for business purposes.
32% of surveyed businesses don't use any social media channels for business purposes.



Social media channels used for business purposes by industry sectors

(Base: All Decision Makers – 500)



*small base

Facebook followed by LinkedIn are the most prominent social media channels across industry sectors. Facebook is particularly popular with the Retail (71%), Public Administration (68%) and Manufacturing (63%) sectors.

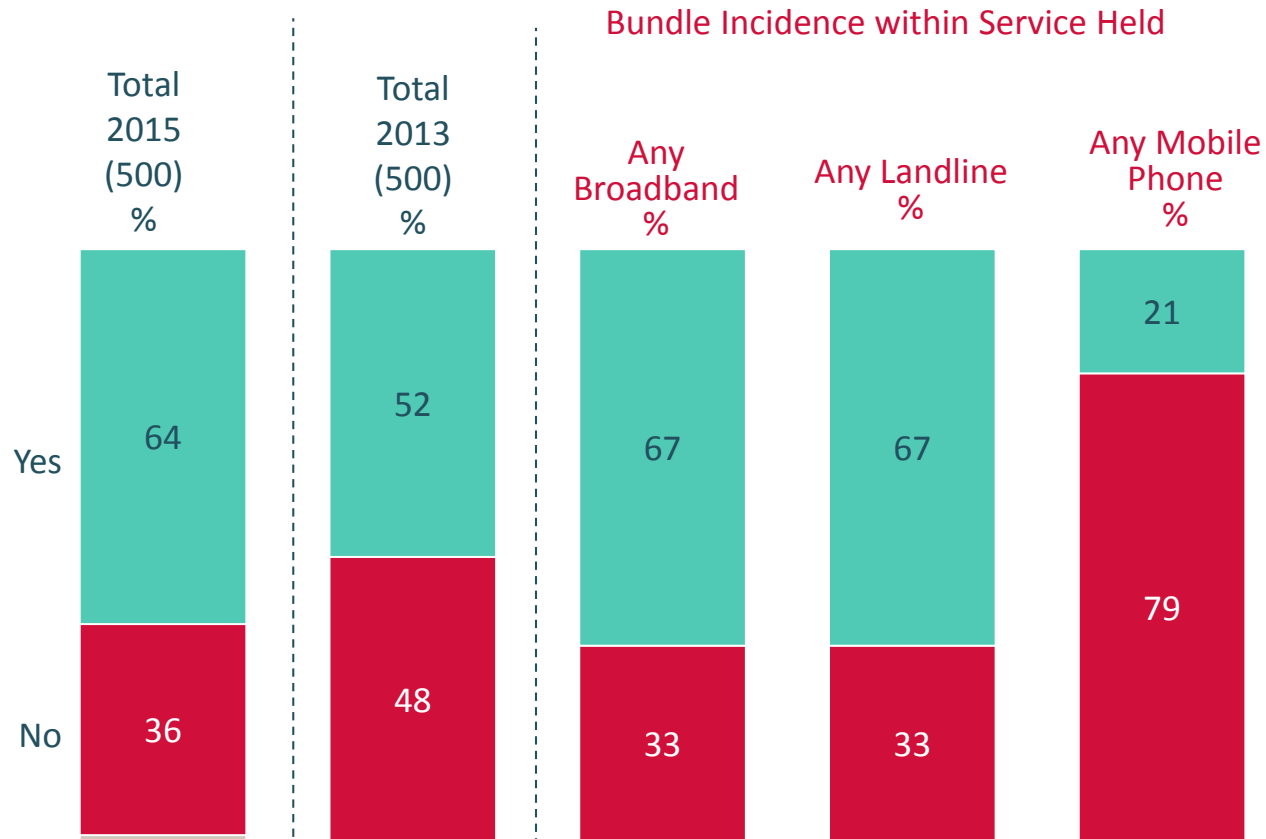




Bundles

Incidence of purchasing more than one service as part of overall package

(Base: All Decision Makers - 500)



* Bundle calculation amended 2015 v 2013

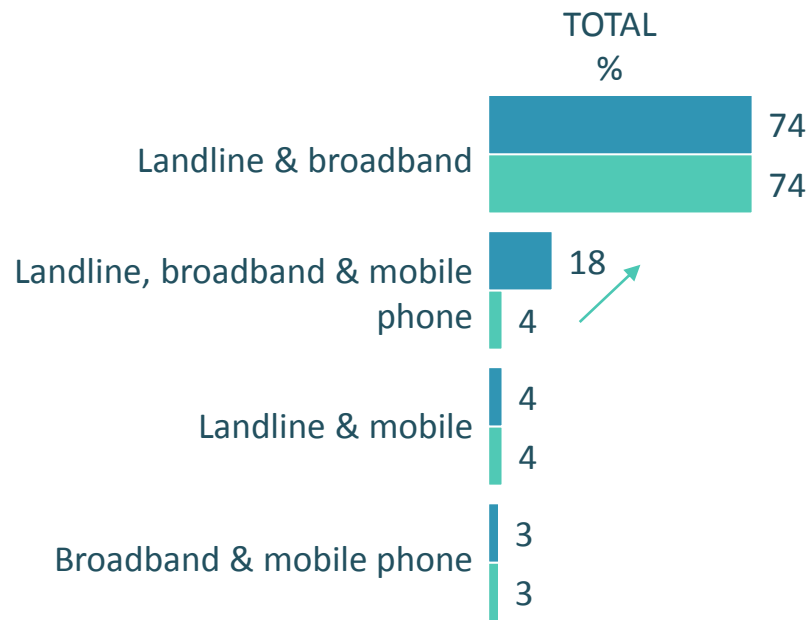
64% of surveyed SME businesses purchase bundled telecommunications services.



Bundle types purchased

TOTAL 2015
TOTAL 2013

(Base: All With More Than 1 Service In Bundle - 320)



Don't Know bundle type 1%

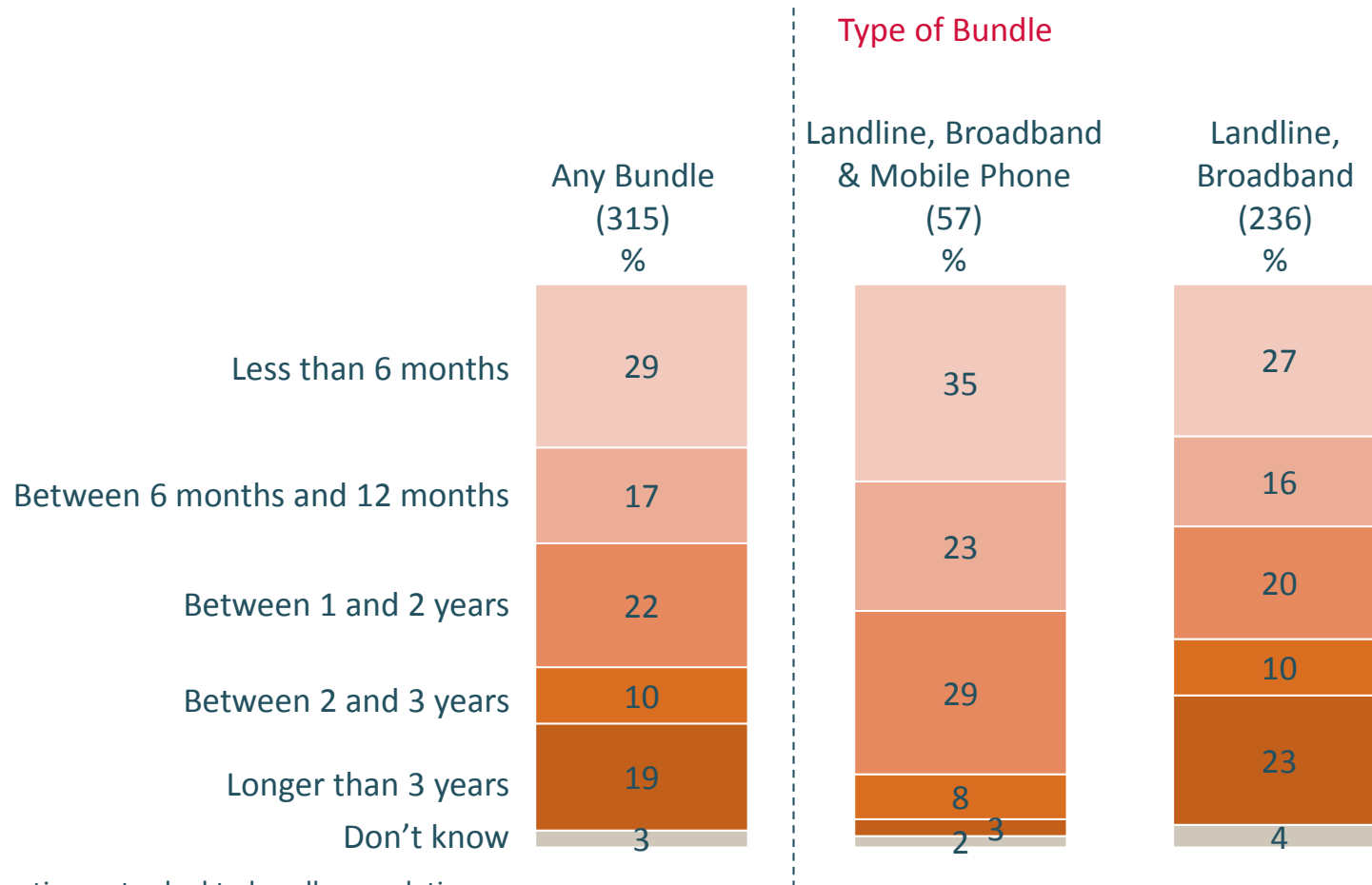
	Area -2015				Company Size -2015		
	Total Urban (206) %	Dublin (99) %	Urban Less Dublin (109) %	Rural (114) %	Micro (272) %	Small (44) %	Medium (4) %
Landline & broadband	73	69	77	75	73	81	63
Landline, broadband & mobile phone	19	21	16	16	19	12	10
Landline & mobile	4	2	4	5	4	3	21
Broadband & mobile phone	3	4	1	3	3	2	0

The most popular bundle type remains a bundle of landline and fixed broadband services. There has been a significant rise in the landline, fixed broadband & mobile phone bundle type since 2013.



Length of time subscribed to a bundle

(Base: All With Bundle who know bundle type - 315)



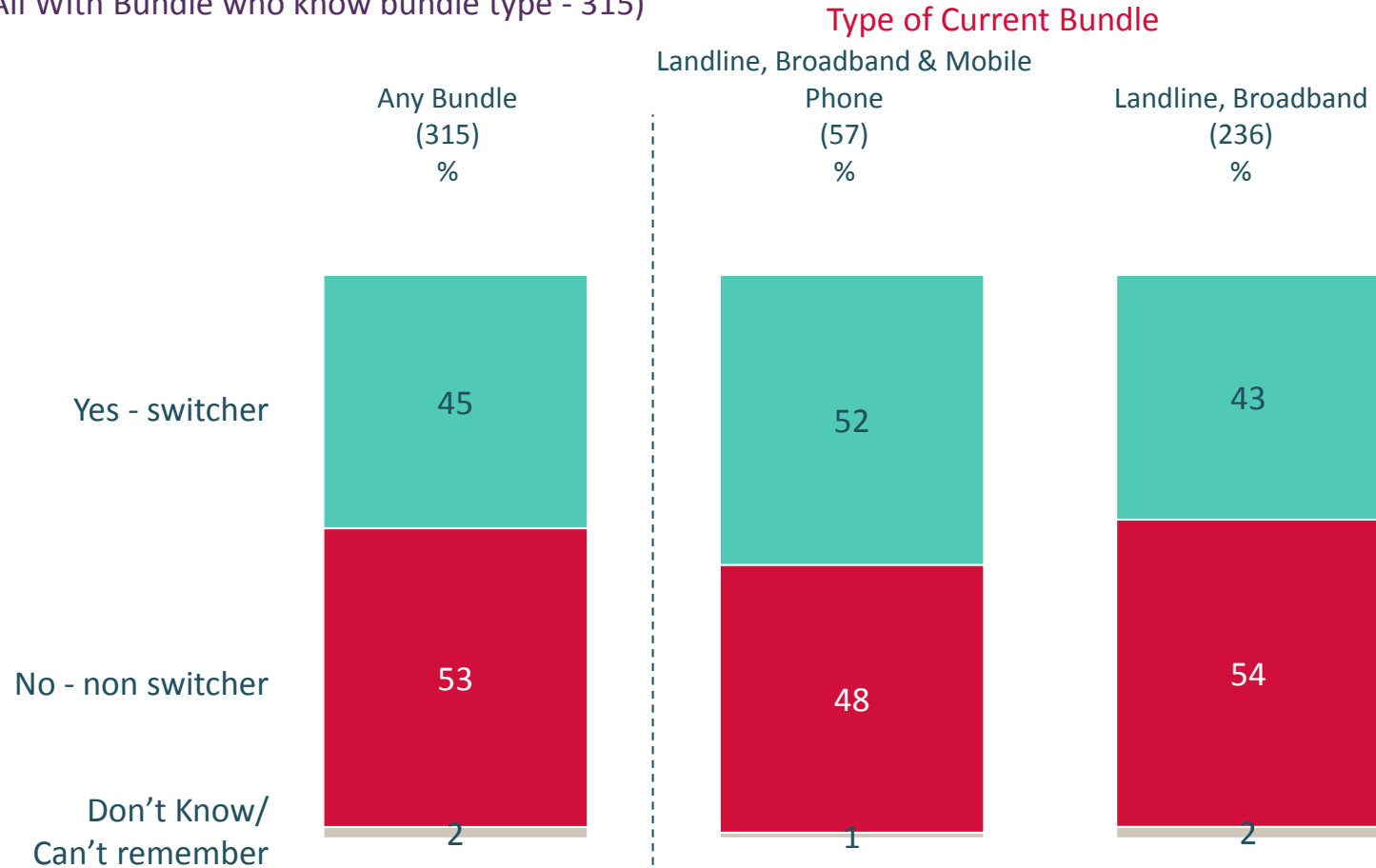
2013 question not asked to bundle population
Other bundle type – base too small to show

29% of bundled service purchasers subscribed to a bundled service less than 6 months ago. 35% of business with a landline, broadband and mobile phone bundle have held this bundle for less than six months.



Incidence of switching telecommunication service provider at time of Bundle Sign Up

(Base: All With Bundle who know bundle type - 315)



2013 question not asked to bundle population
Other bundle types – base too small to show

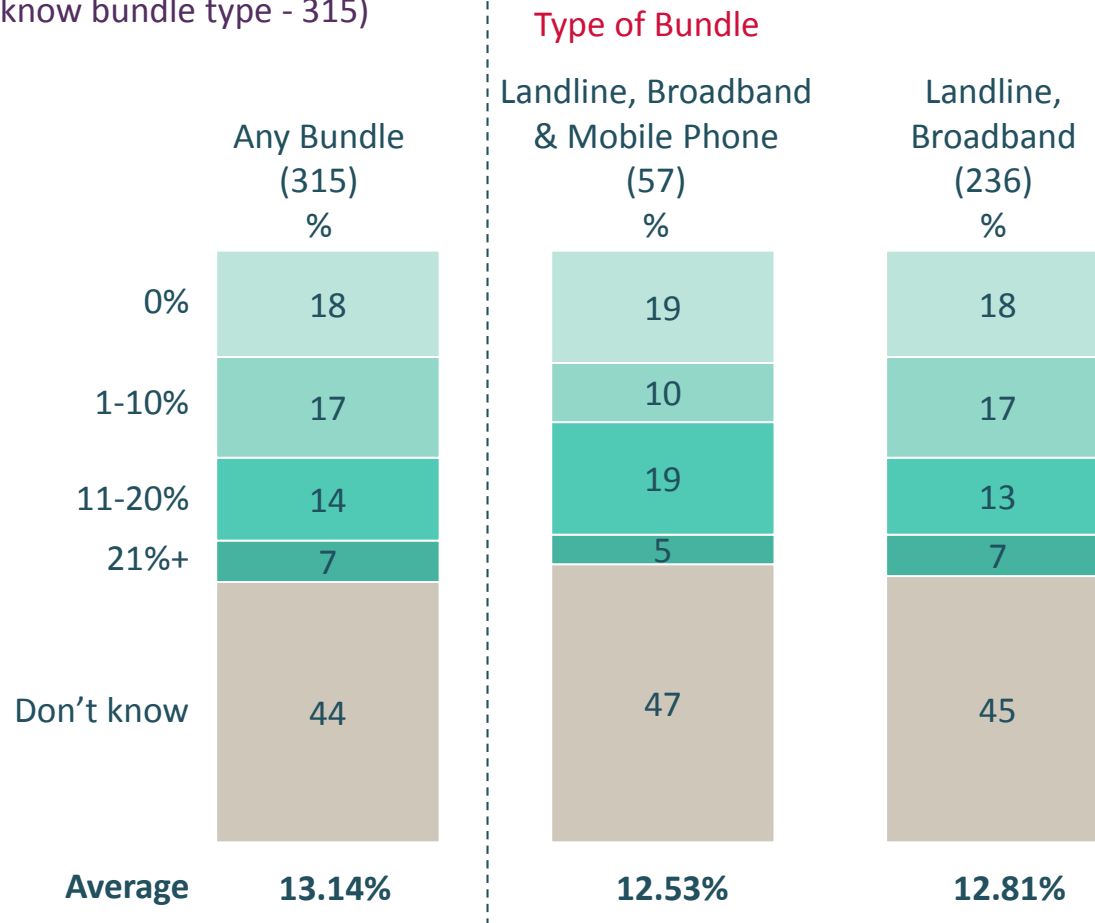
45% of bundle owners changed providers in order to avail of bundled services, with switching rate higher for those who currently have a Landline, Broadband and Mobile Phone bundle.

(Q14d)



Perceived percentage savings on monthly bill if were to research better deal?

(Base: All With Bundle who know bundle type - 315)



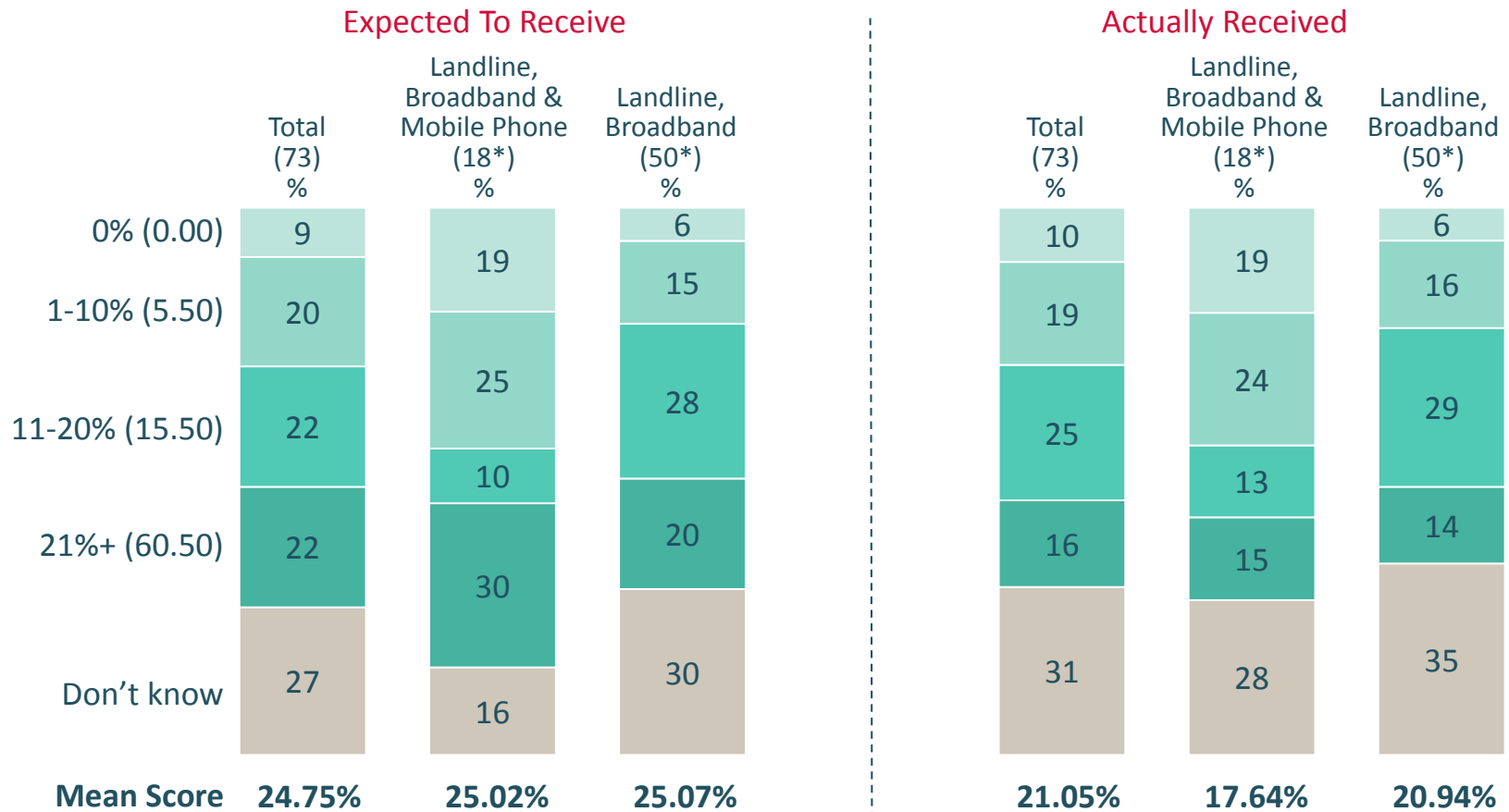
* Other bundles too small to show

Bundle owners think they could receive an average savings of 13% if the best deal was obtained.



Expected v actual savings received when switching service provider (switchers in the past 12 months only)

(Base: All Bundle Owners Who Switched Service Provider In The Past Year - 73)



* Small base

** Other bundles too small to show

Expected savings when switching to current bundle average at 25% while actual savings experienced are 21%.

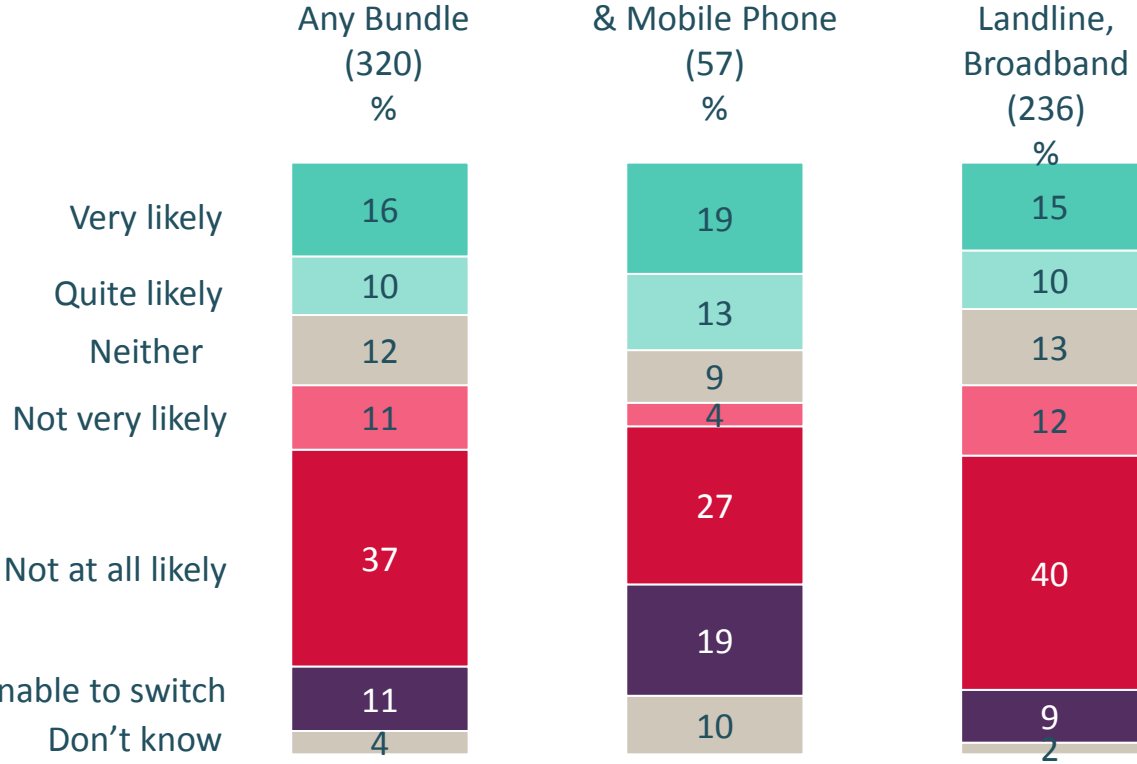


(Q16b)

Likelihood to switch service provider within the next 12 months

(Base: All Bundle Owners - 320)

Type of Bundle
Landline, Broadband
& Mobile Phone



* Other bundles too small to show

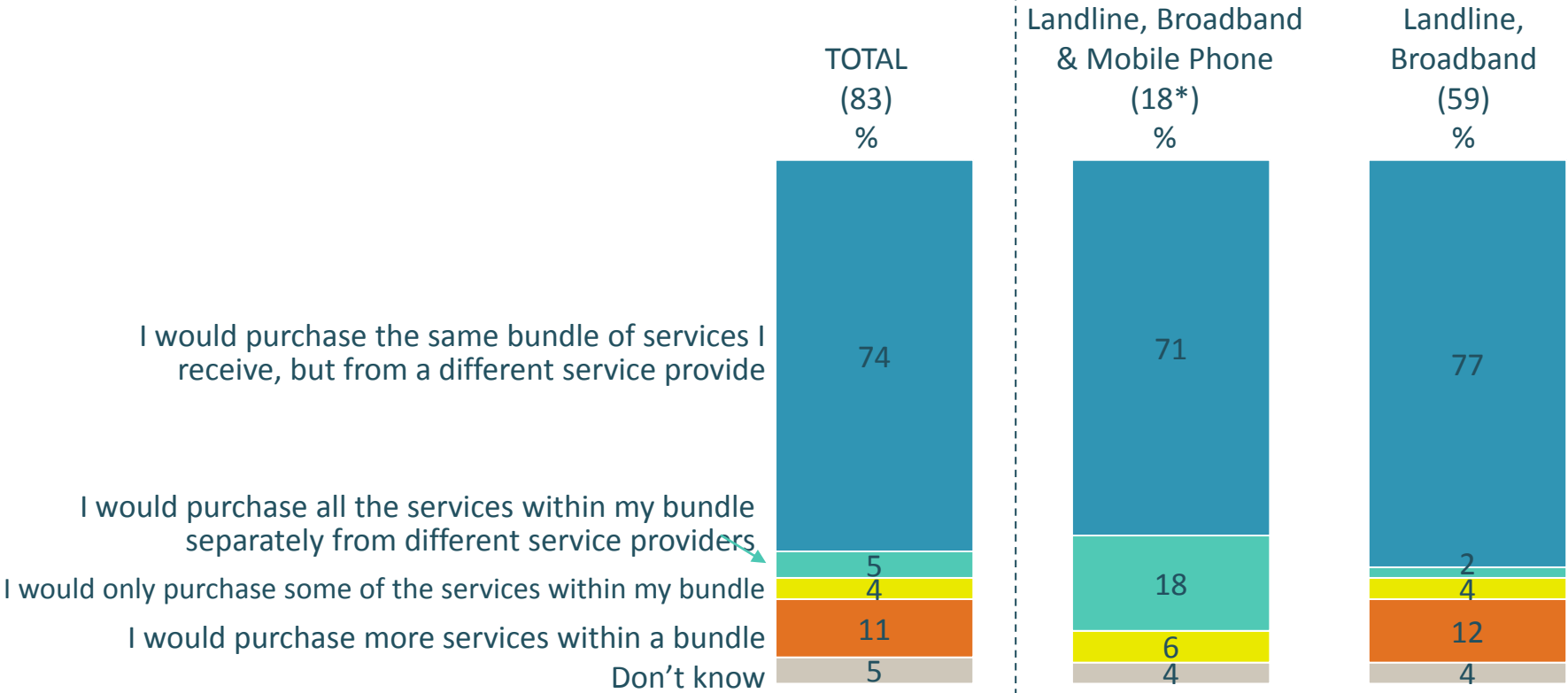
26% of all respondents purchasing bundled service are likely to switch their service provider within the next 12 months.



Action most likely to take if you switch service provider

(Base: All Bundle Owners Who Are Likely To Switch Within the Next 12 Months - 83)

Type of Bundle



- Other bundles too small to show
- Small base

74% of bundle owners intending to switch are likely to purchase the same bundle of services, but from a different service provider.



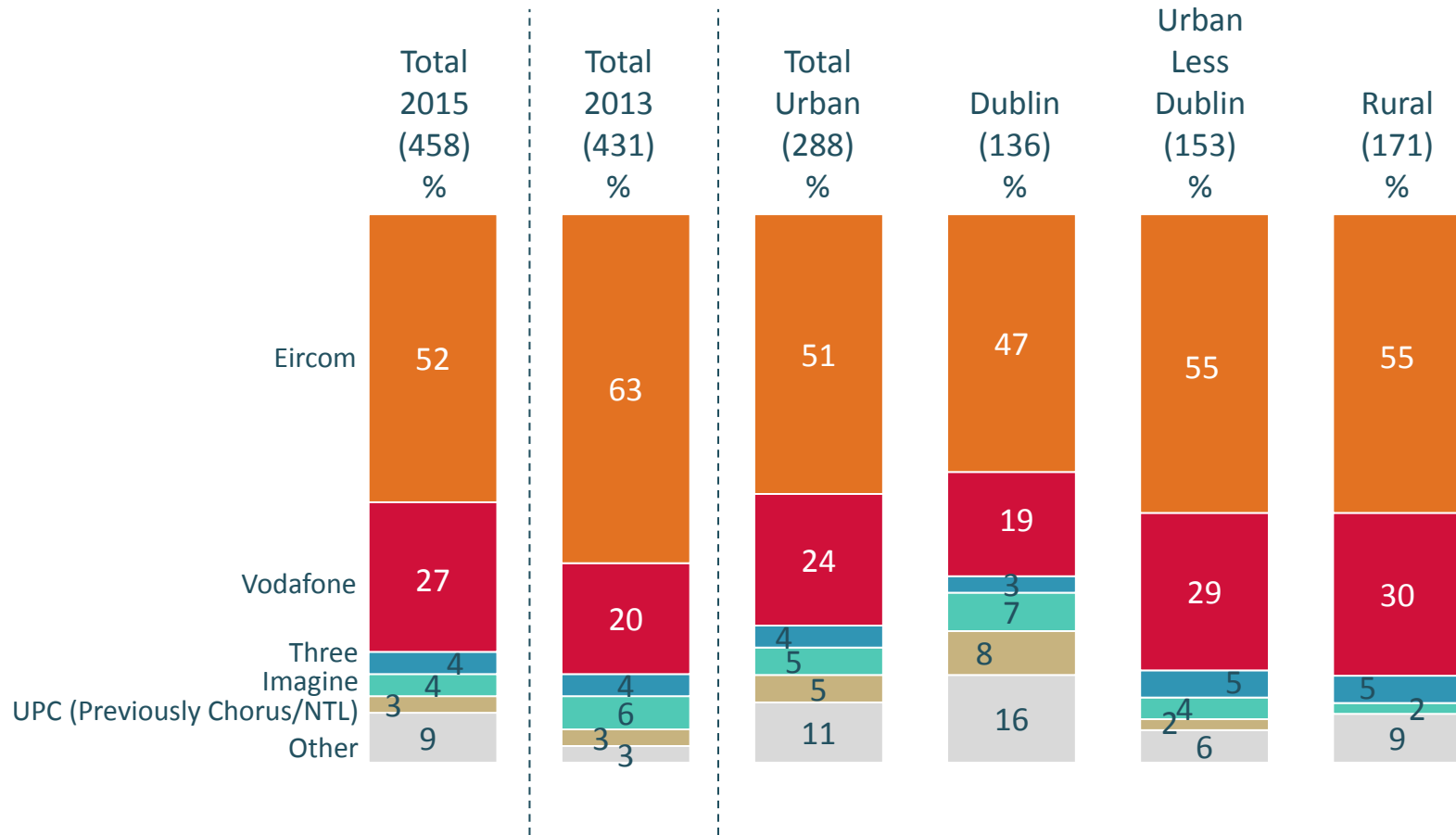
Landline Telephone Service



Main landline telephone service provider

(Base: All Landline Telephone Service Subscribers - 458)

AREA



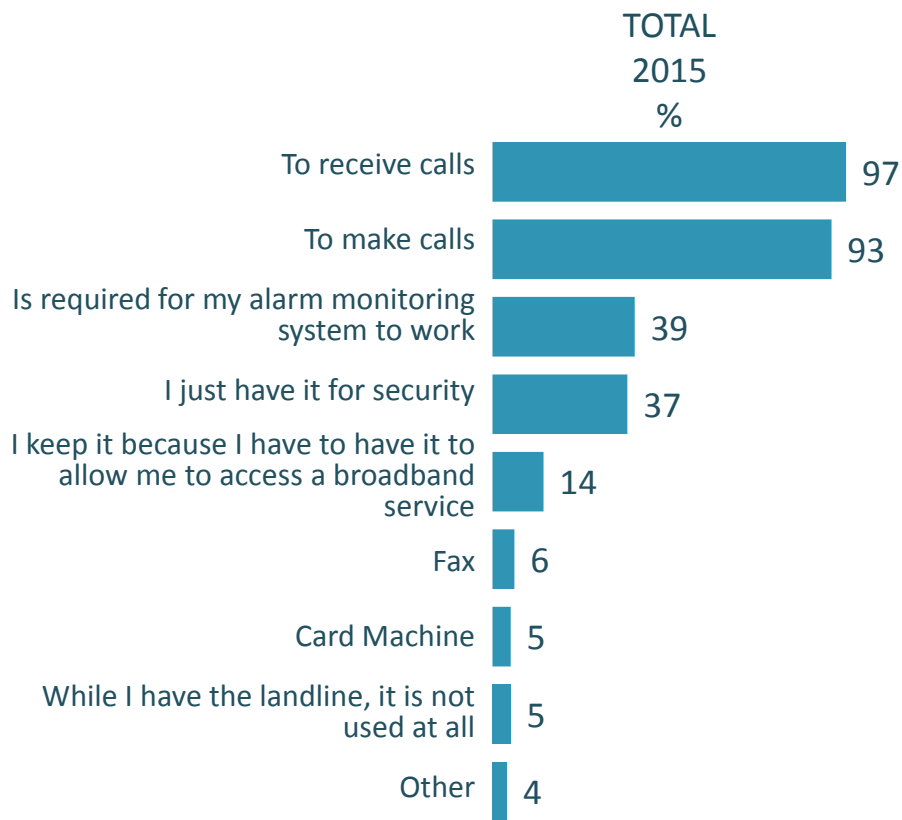
Other - Pure Telecom/Magnet/Digiweb/Blueface

52% of landline telephone service business subscribers purchase this service from eircom in 2015 compared to 63% in 2013.



Use of landline service

(Base: All Landline Subscribers - 458)



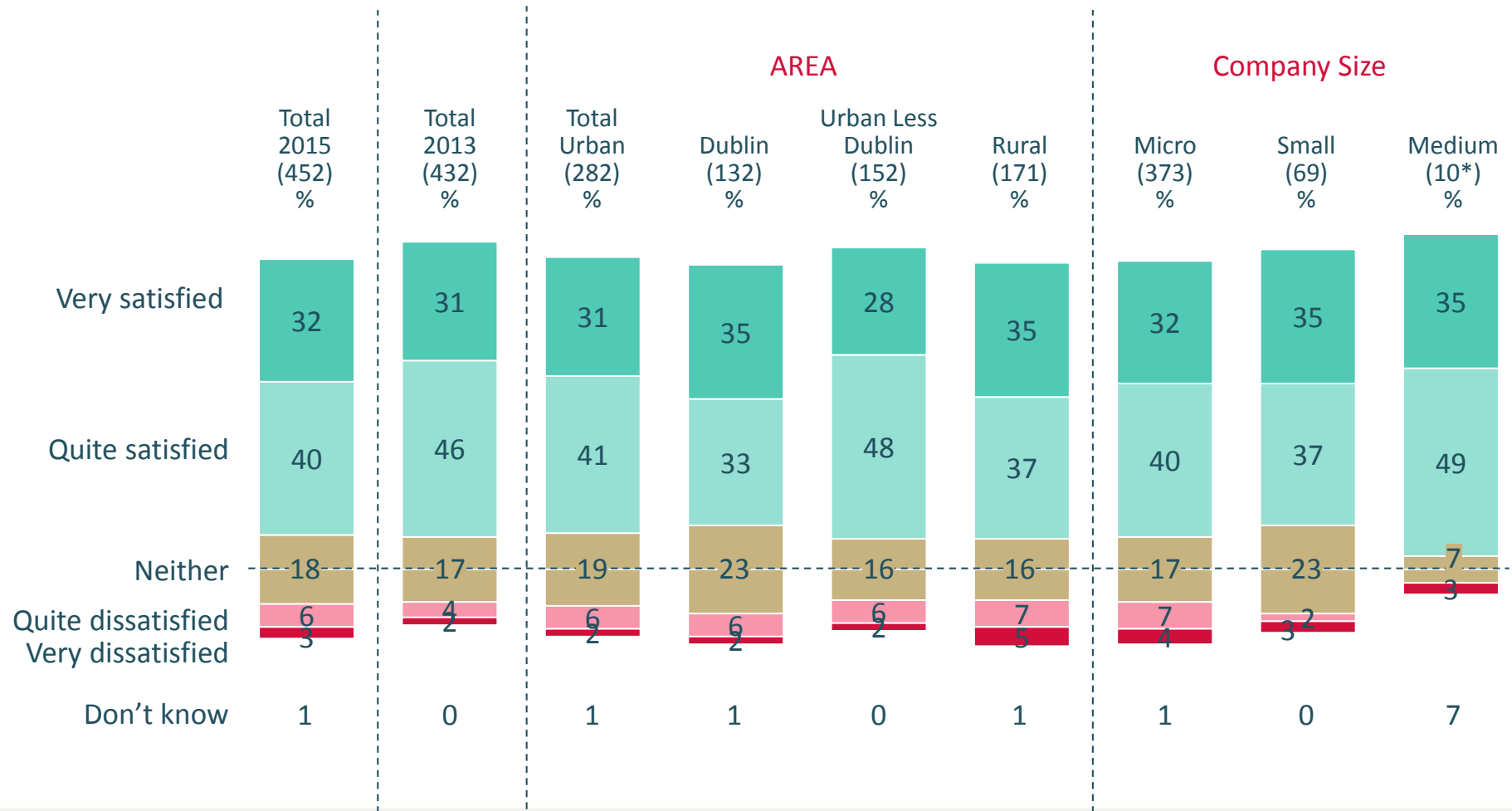
Area -2015				Company Size -2015		
Total Urban (288) %	Dublin (136) %	Urban Less Dublin (153) %	Rural (171) %	Micro (379) %	Small (69) %	Medium (10) %
96	96	97	98	97	97	98
92	91	93	94	92	97	95
40	41	39	38	36	58	45
36	32	38	40	37	40	27
13	12	13	17	15	13	9
6	10	2	7	6	8	7
3	2	5	7	6	1	1
6	7	5	3	5	4	0
5	6	4	2	3	6	7

97% use their landline to receive calls with 93% using landline to make calls. 14% of businesses have landline to facilitate operation of broadband service.



Satisfaction with landline service - I

(Base: All Landline Subscribers (Giving A Provider Name) - 452)



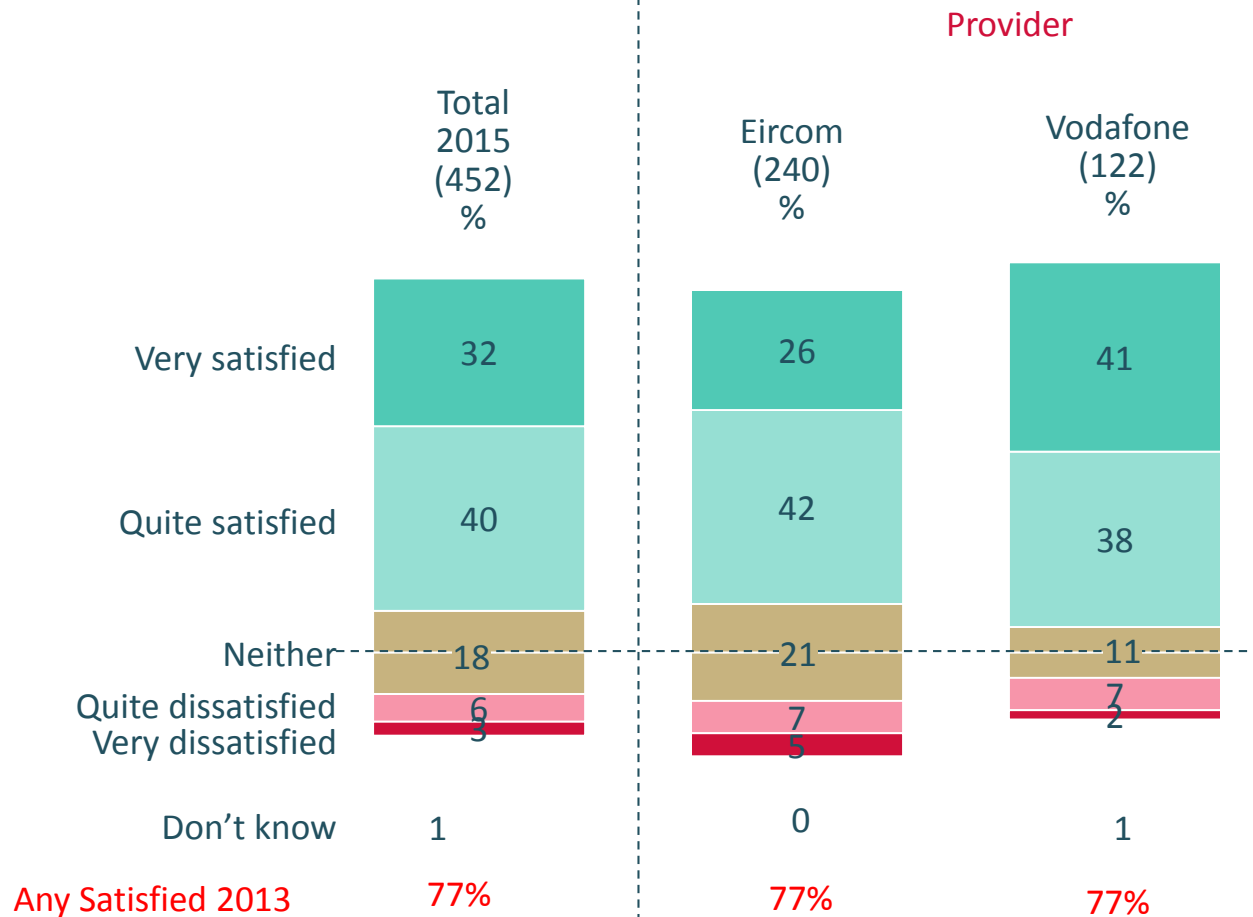
*small base

Satisfaction with landline service in 2015 is slightly lower than in 2013 (72% versus 77%). Satisfaction levels vary with company size with Medium sized companies having 84% satisfaction.



Satisfaction with landline service - II

(Base: All Landline Subscribers (Giving A Provider Name) - 452)

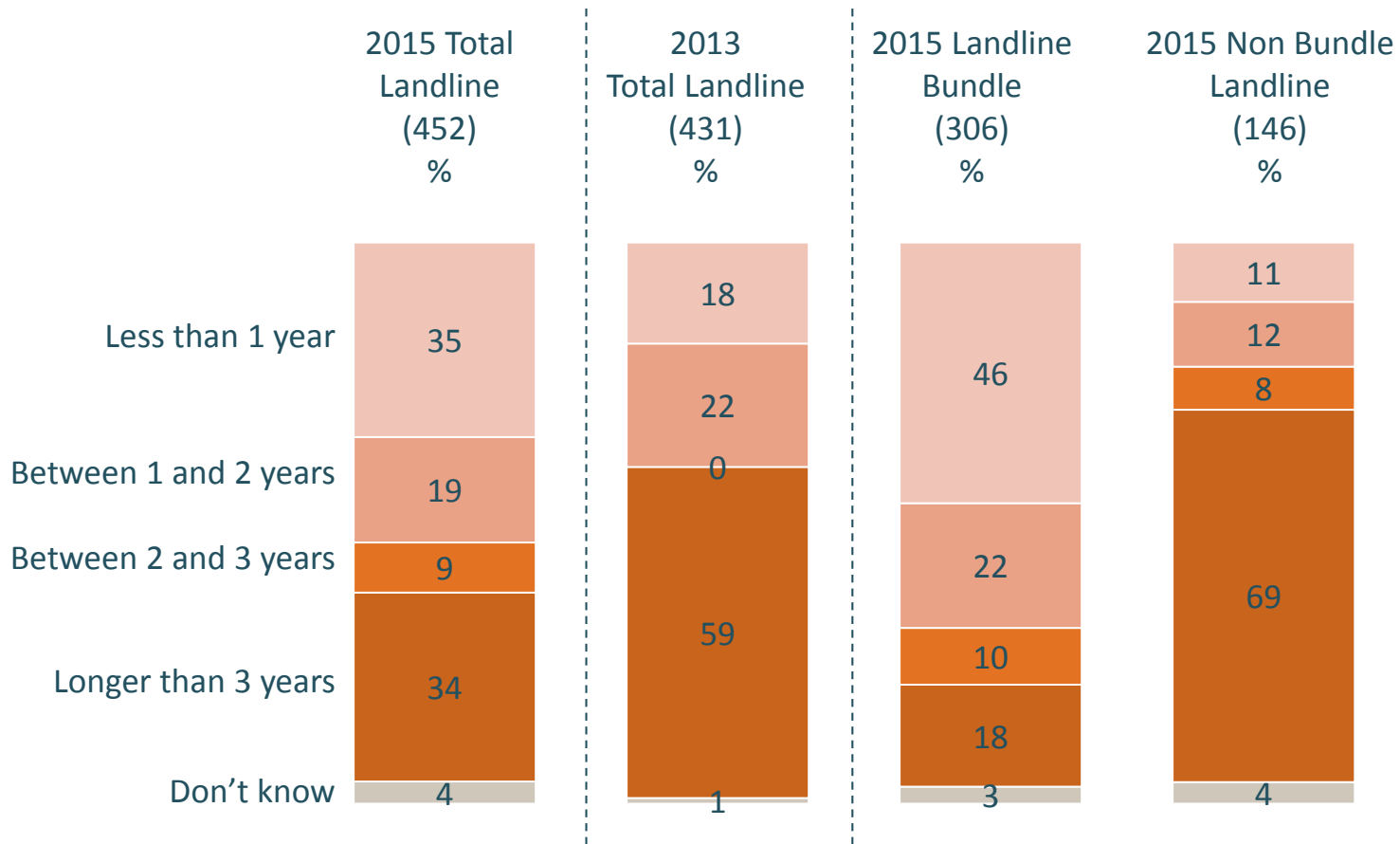


Landline telephone service satisfaction is 68% among eircom customers and 79% among Vodafone customers.



Length of time subscribed to landline service

(Base: All Landline Subscribers (Giving A Provider Name) – 452)



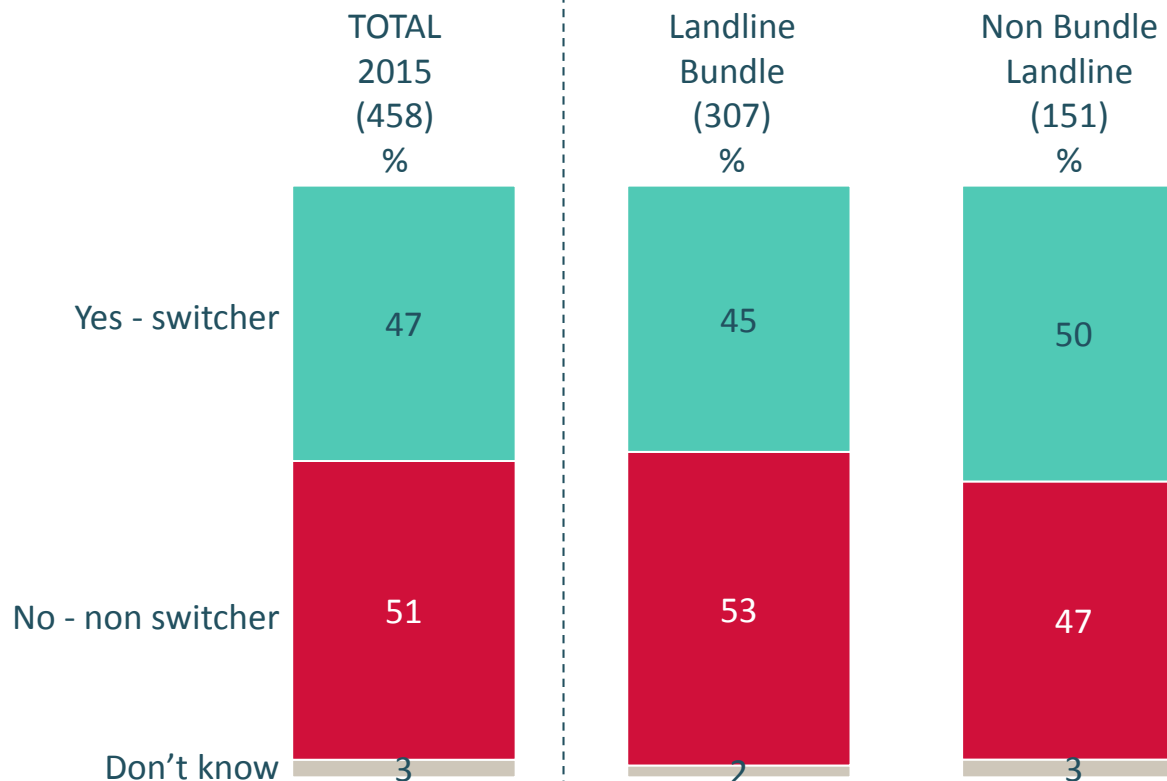
*22% 2013 = 1 -3 years

35% of all landline subscribers have had the service with their current provider for less than 1 year with this figure falling to 11% among respondents purchasing standalone landline telephone service.



Have you previously purchase landline service from a different service provider?

(Base: All Landline Subscribers - 458)



Switching questions asked in a different way 2013

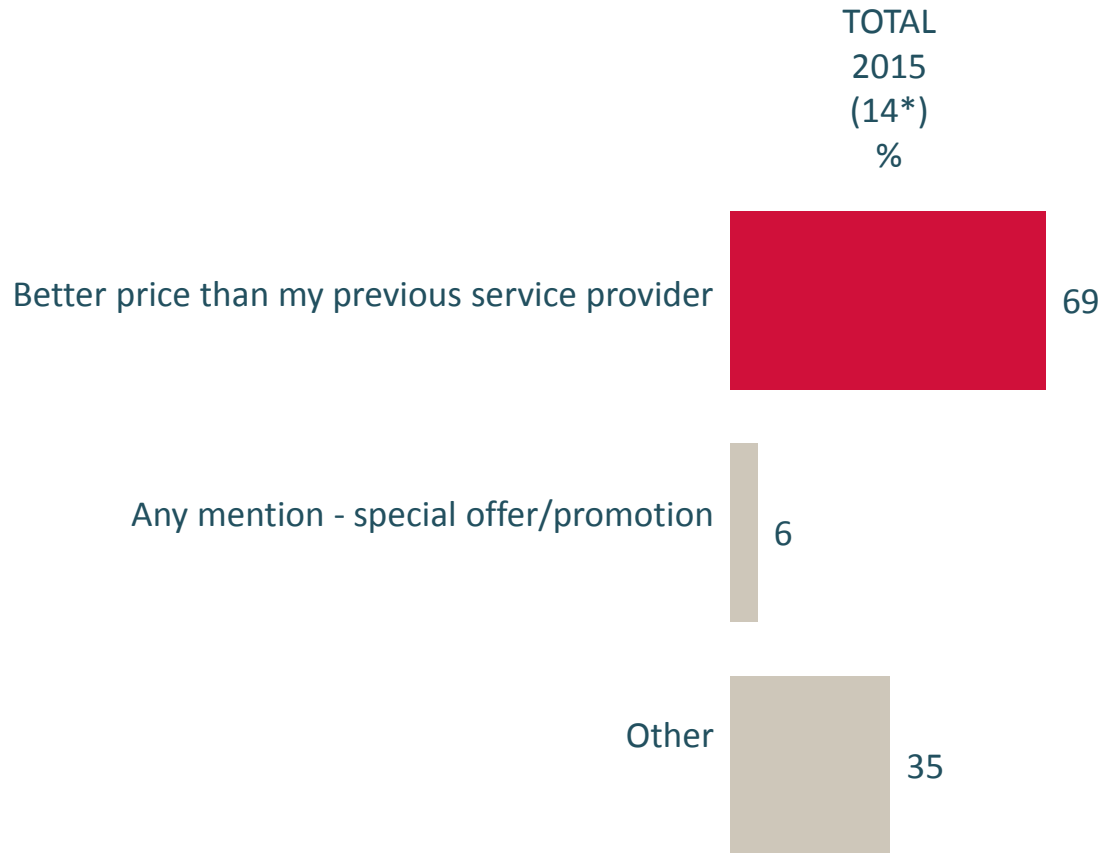
47% of all respondents purchasing landline service have switched service provider.



(Q24a)

What prompted you to select landline service provider within past year?

(Base: All Landline Owners Who Switched Past Year (And Stated Provider) – 14*)



* Small base

2013 reasons stated are not comparable

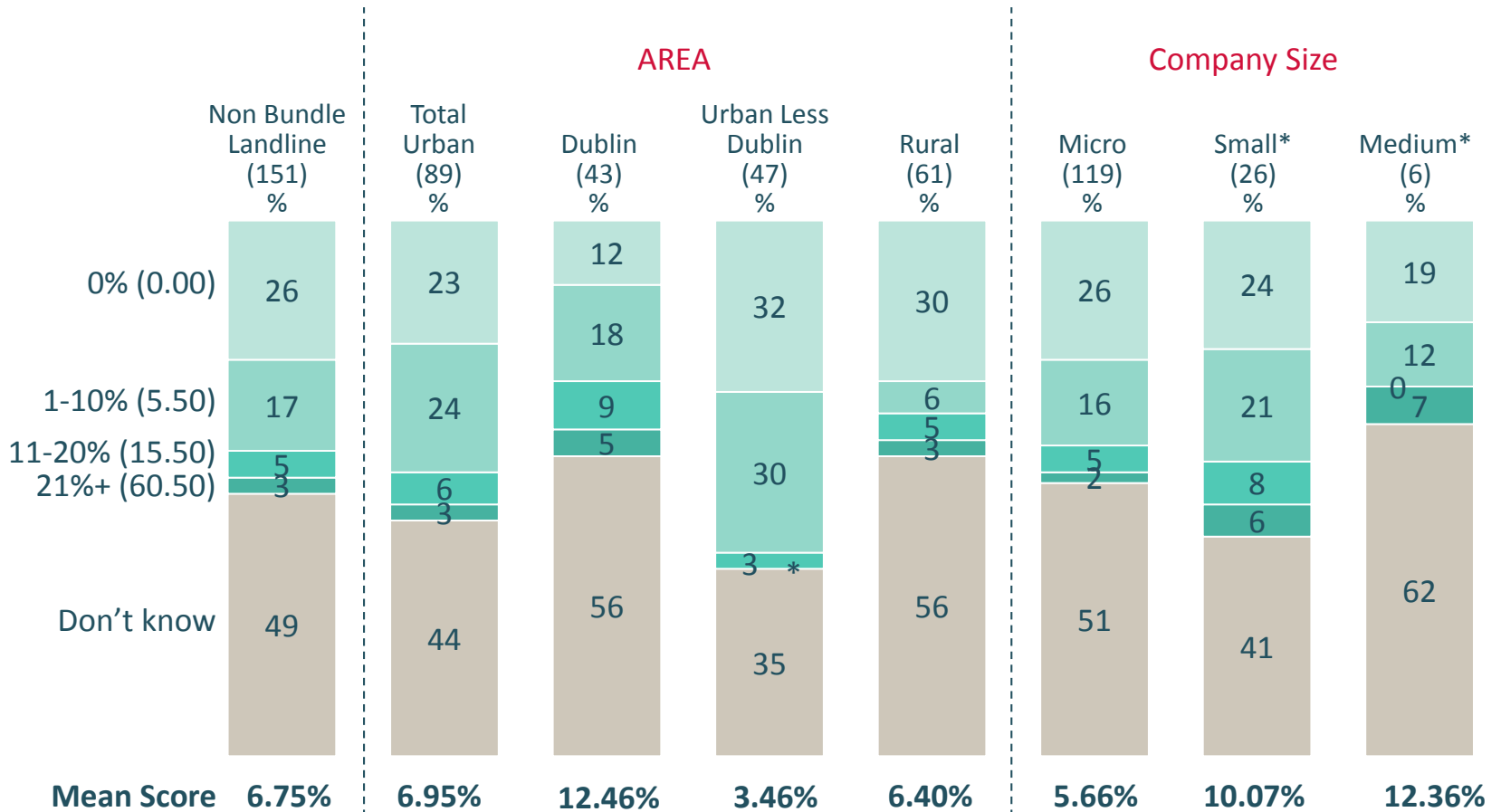
Better price is the main reason for switching provider.

REDC

(Q 15/24b)
36

Perceived percentage savings on monthly bill if the best deal was obtained

(Base: All Non Bundle Landline Owners - 151)



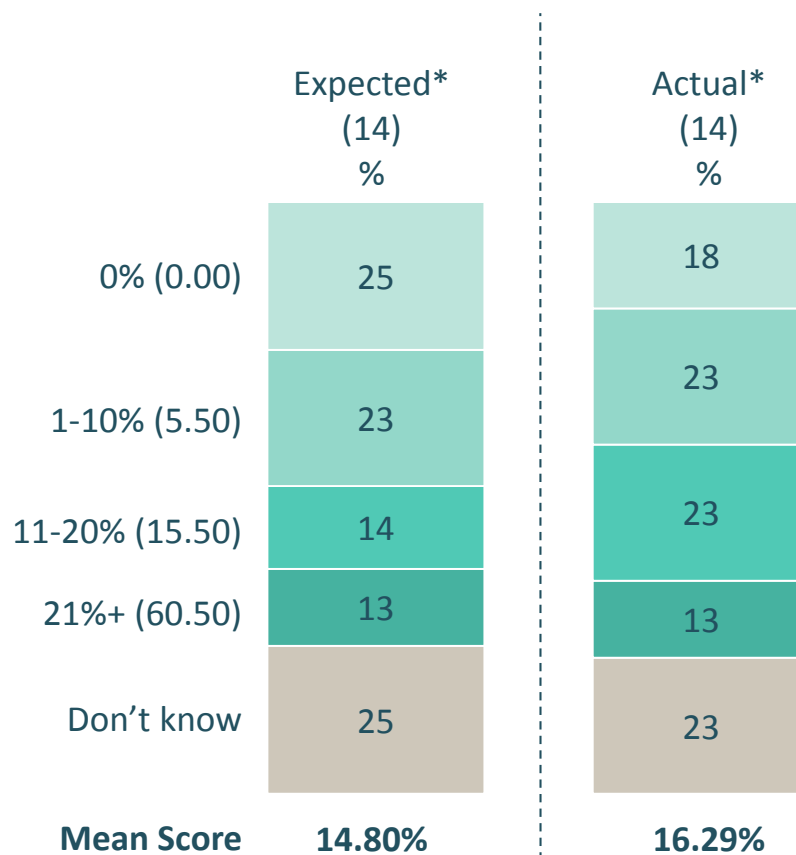
* Small base

Average expected savings 7%. Highest for companies in Dublin and for Small and Medium sized businesses.



Expected v actual savings received when switching landline service provider (switchers in the past 12 months only)

(Base: All Non Bundle Landline Owners Who Switched Service Provider in the Past 12 Months - 14)



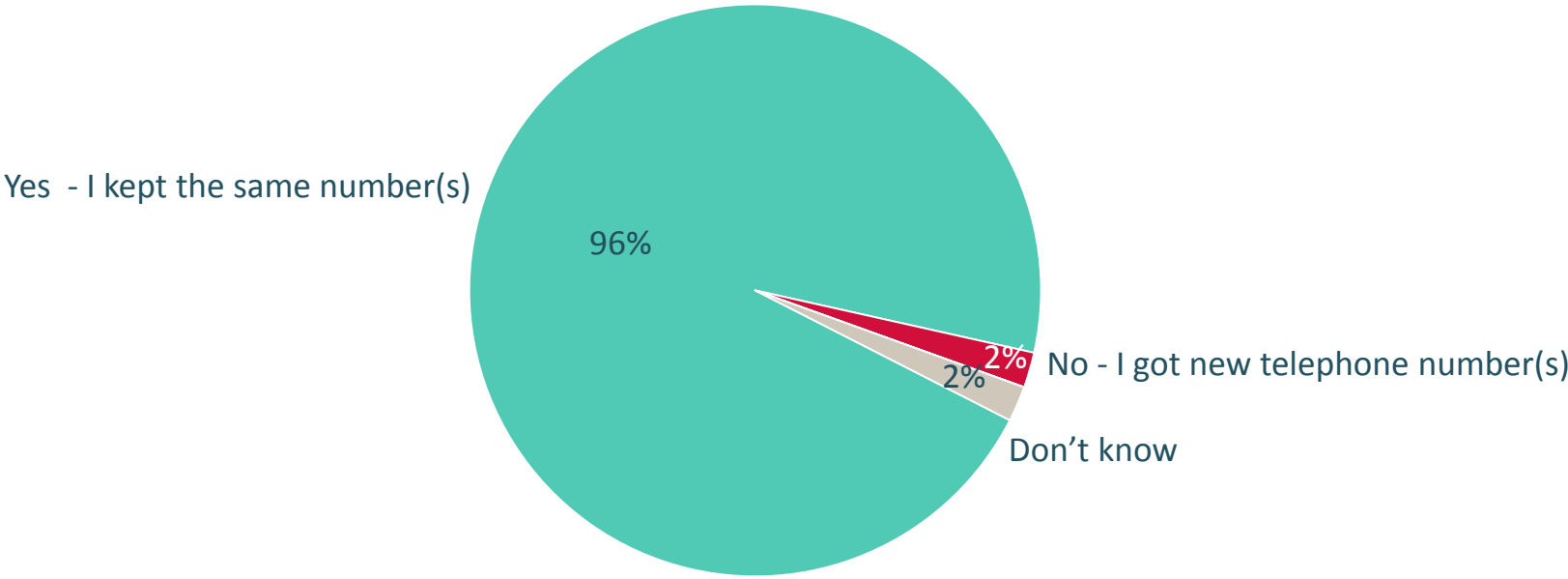
* Small base

Actual savings amounted to more than expected savings when switching landline service providers.



Telephone number retention when switching landline service provider

(Base: All Landline Service Subscribers Who Switched Service Provider - 213)



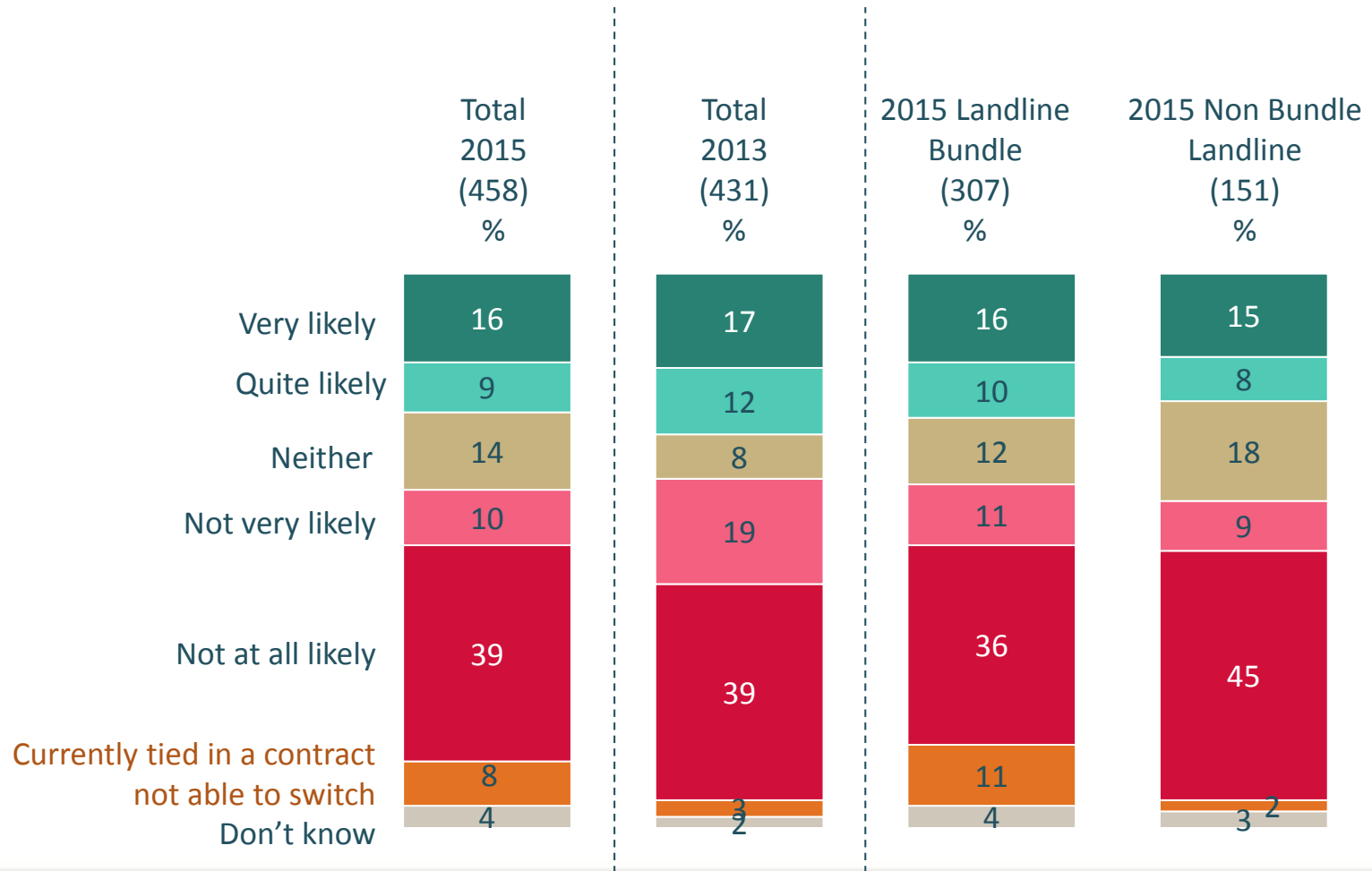
No difference by sample profile

96% of respondents who switched landline service provider in the past stated that they kept the same telephone number when switching service provider.



Likelihood to switch landline service provider within the next 12 months

(Base: All Landline Subscribers - 458)

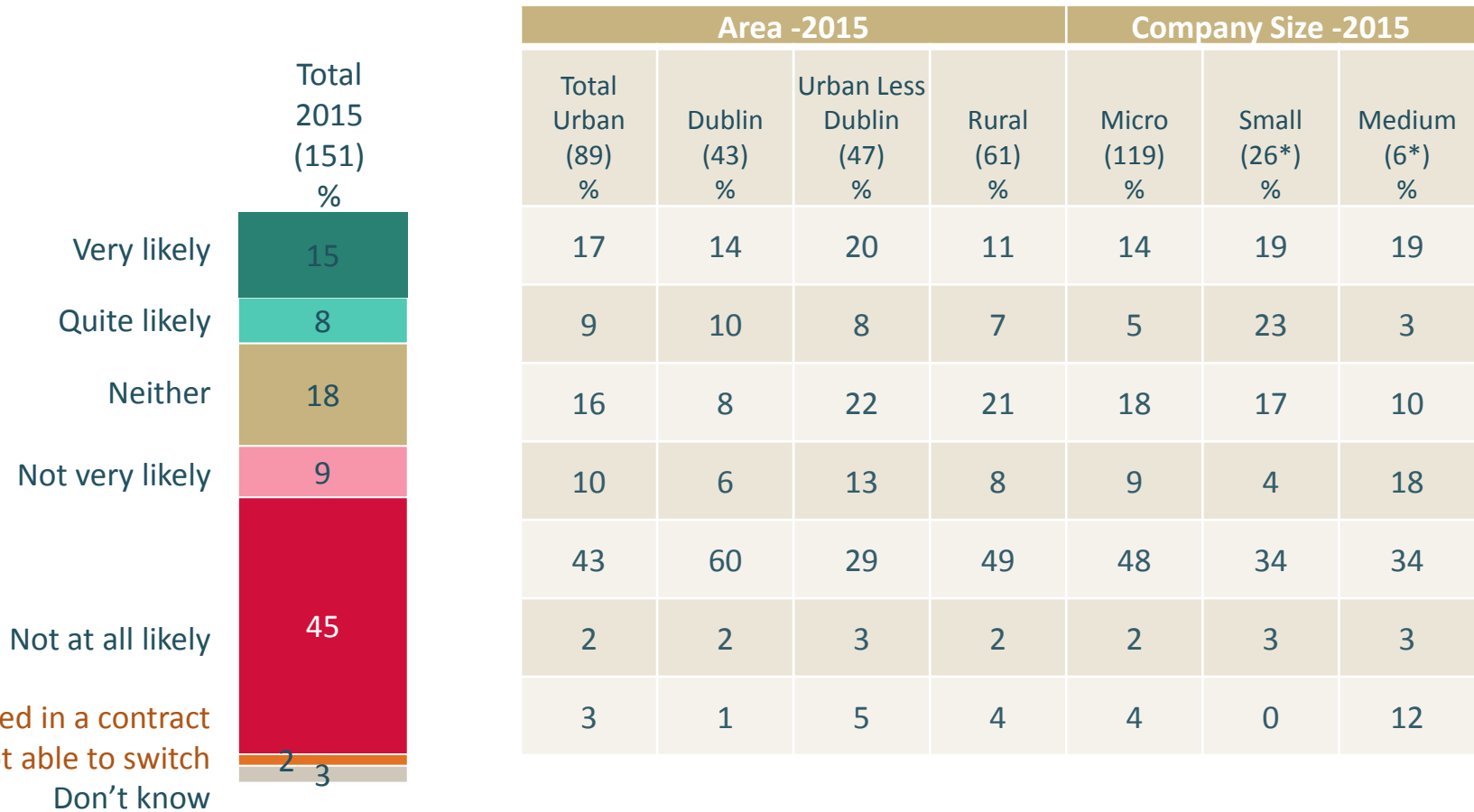


25% of all landline service subscribers are likely to switch their service provider within the next 12 months. 54% of Non Bundle Landline owners are unlikely to switch versus 47% landline bundle owners.



Likelihood to switch landline service provider within the next 12 months

(Base: All Non Bundle Landline Subscribers - 151)



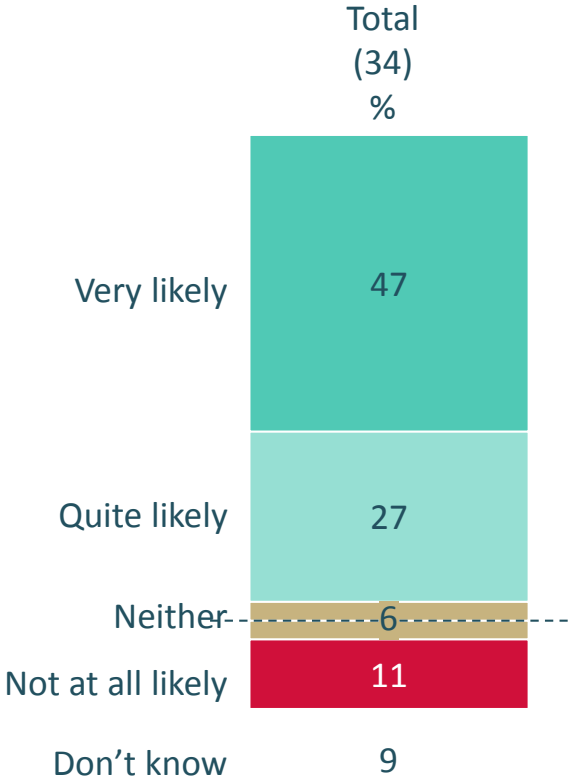
*Small Base

Small companies are most likely to switch landline service provider.



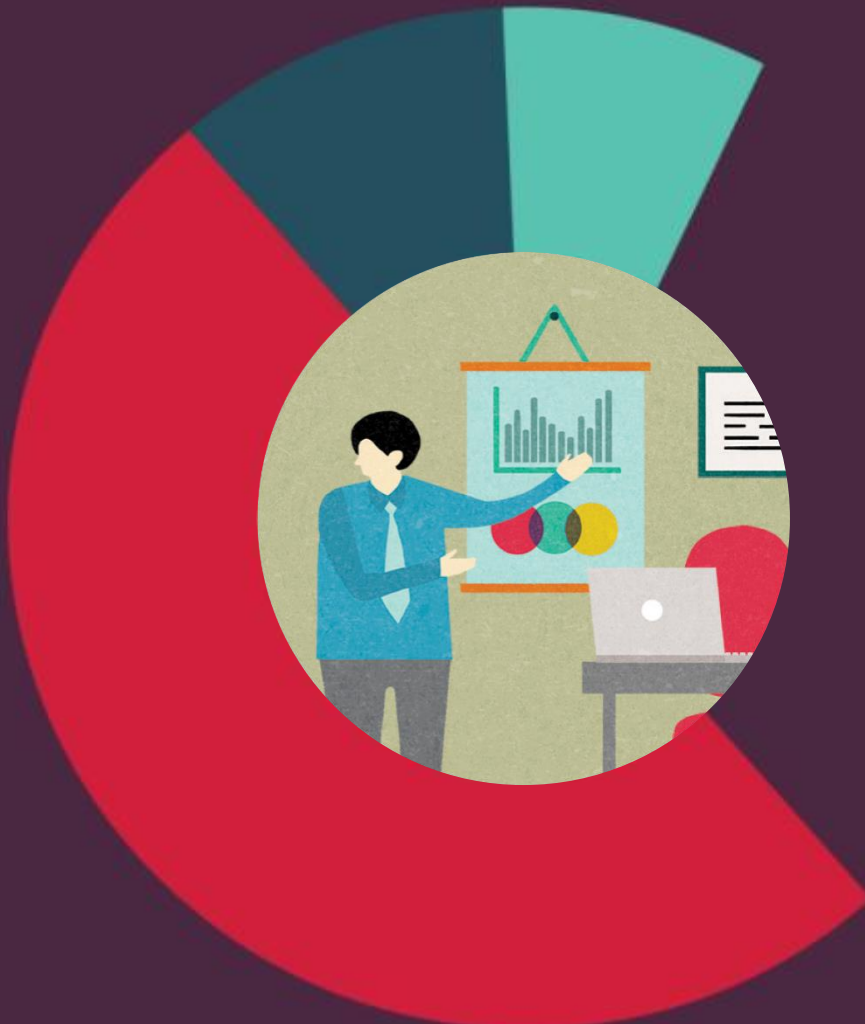
Likelihood of purchasing landline service in a bundle with other services (standalone landline service switchers only)

(Base: All Non Bundle Landline Service Subscribers that are likely to switch - 34)



74% of non bundle landline subscribers that are likely to switch within the next 12 months consider purchasing a landline service as part of a bundle with another telecommunications service(s).

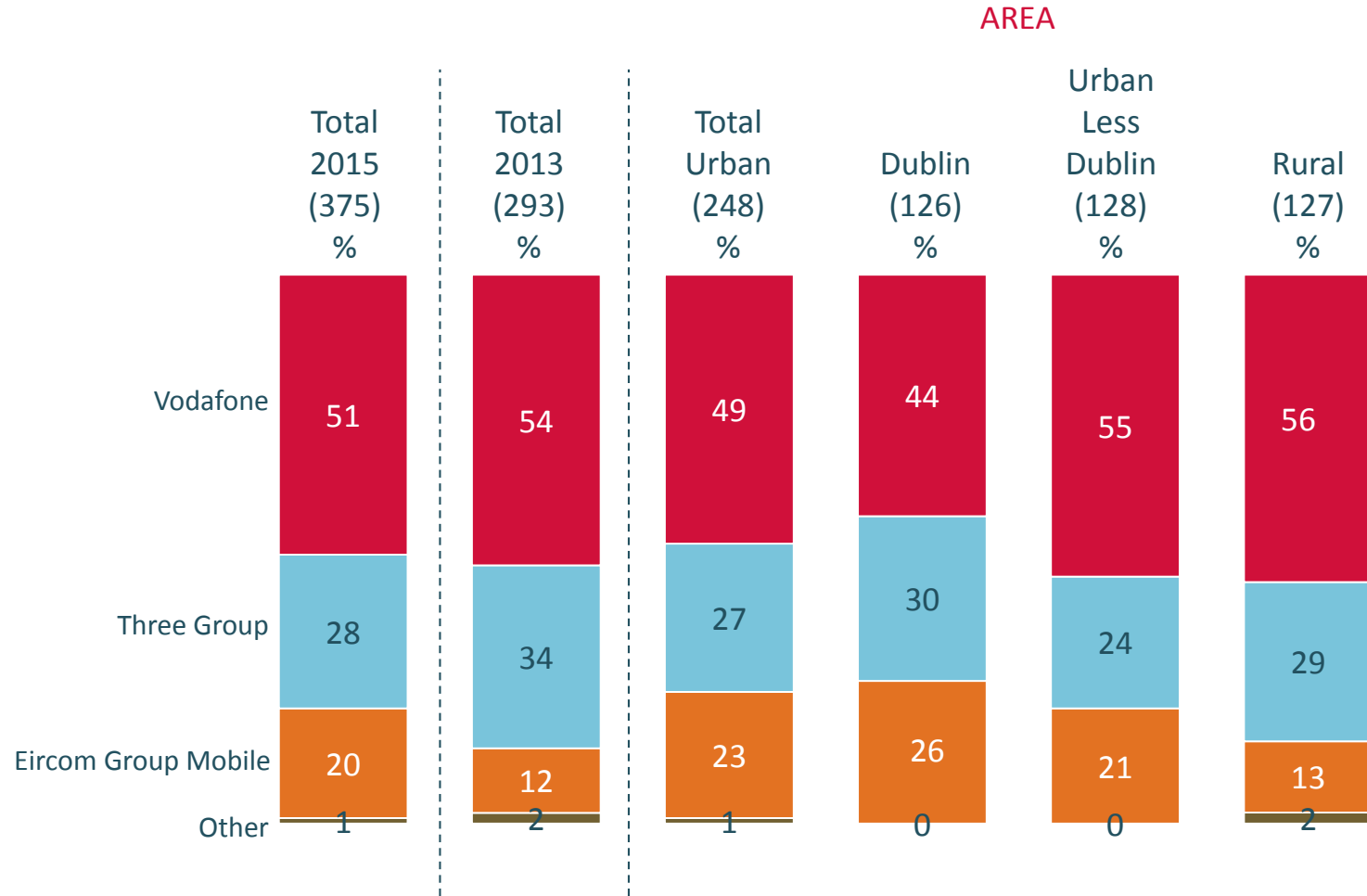




Mobile Phone

Main mobile phone service provider

(Base: All Mobile Phone Subscribers – 375)



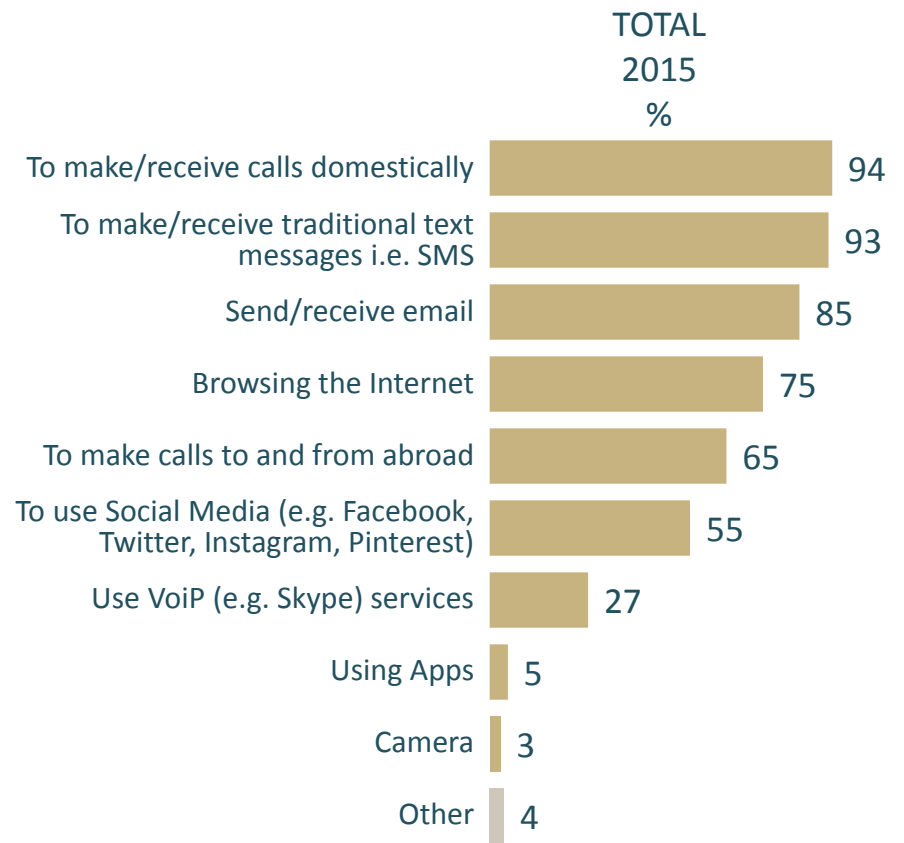
(Note : For the purpose of better comparisons, Three and O2 shares in 2013 were combined)

The majority of businesses purchase mobile phone service from Vodafone (51%) followed by Three (28%) and Eircom Group Mobile (20%).



Use of business mobile phone

(Base: All Mobile Phone Subscribers - 375)



Area -2015				Company Size -2015		
Total Urban (248) %	Dublin (126) %	Urban Less Dublin (128) %	Rural (127) %	Micro (308) %	Small (59) %	Medium (9*) %
93	94	91	97	94	96	95
94	93	95	91	92	95	92
86	88	85	82	85	83	96
75	75	74	75	75	76	74
64	61	66	67	65	61	82
54	57	51	55	55	52	48
27	24	28	28	28	23	41
6	5	6	2	4	5	0
3	3	4	3	4	0	0
4	5	3	3	4	3	5

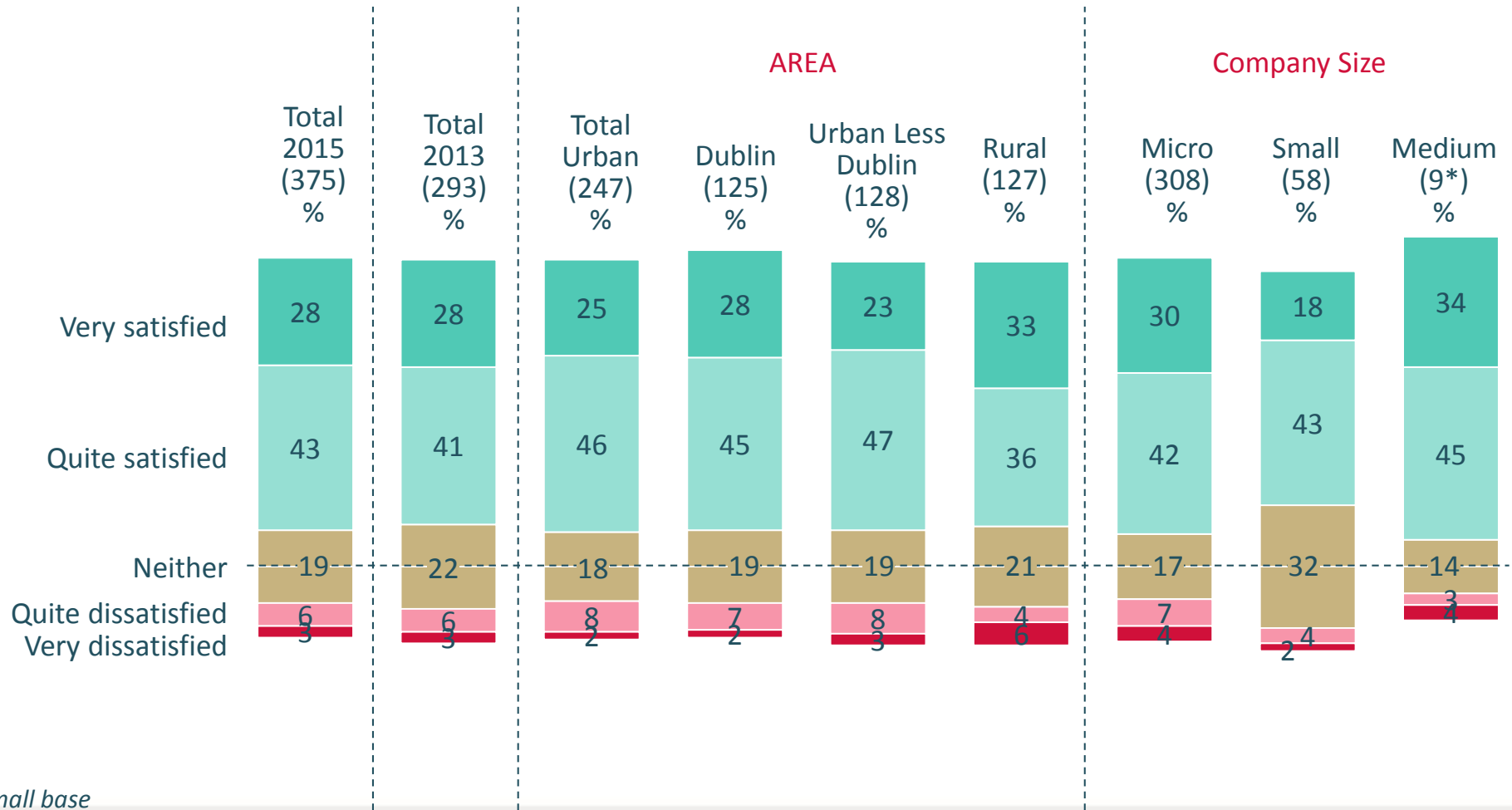
*Small Base

Business mobile phones are most likely used for making/receiving calls domestically (94%), making/receiving SMS (93%) and sending/receiving emails (85%).



Satisfaction with mobile phone service - I

(Base: All Mobile Phone Subscribers - 375)



*small base

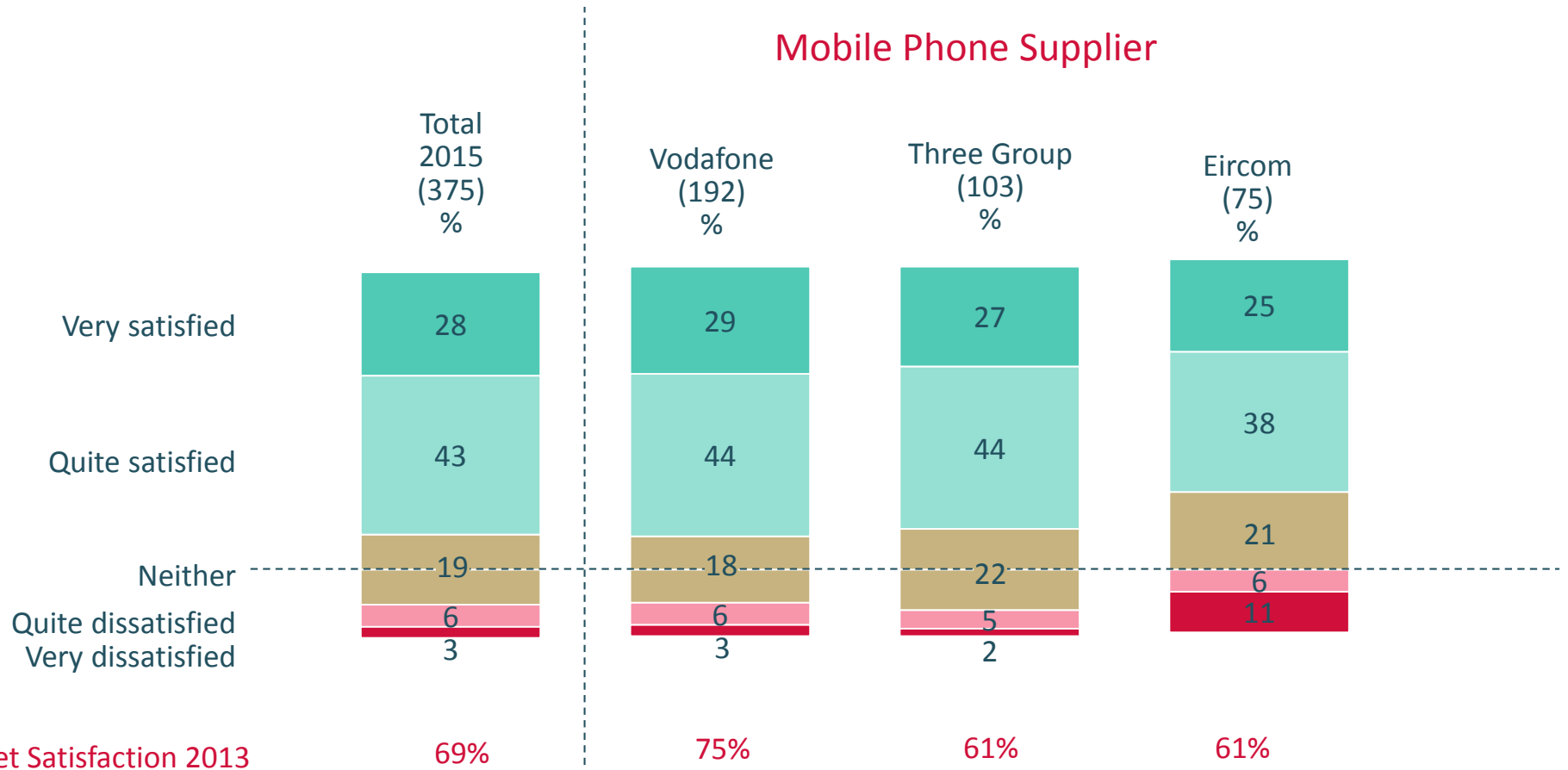
Satisfaction with Mobile Phone service is largely unchanged over time – 71% in 2015 v 69% in 2013. Satisfaction is highest among medium sized companies with 79% of respondents in this group stating that they are very/quite satisfied with their mobile phone service.

ICT Business Survey



Satisfaction with mobile phone service - II

(Base: All Mobile Phone Subscribers - 375)



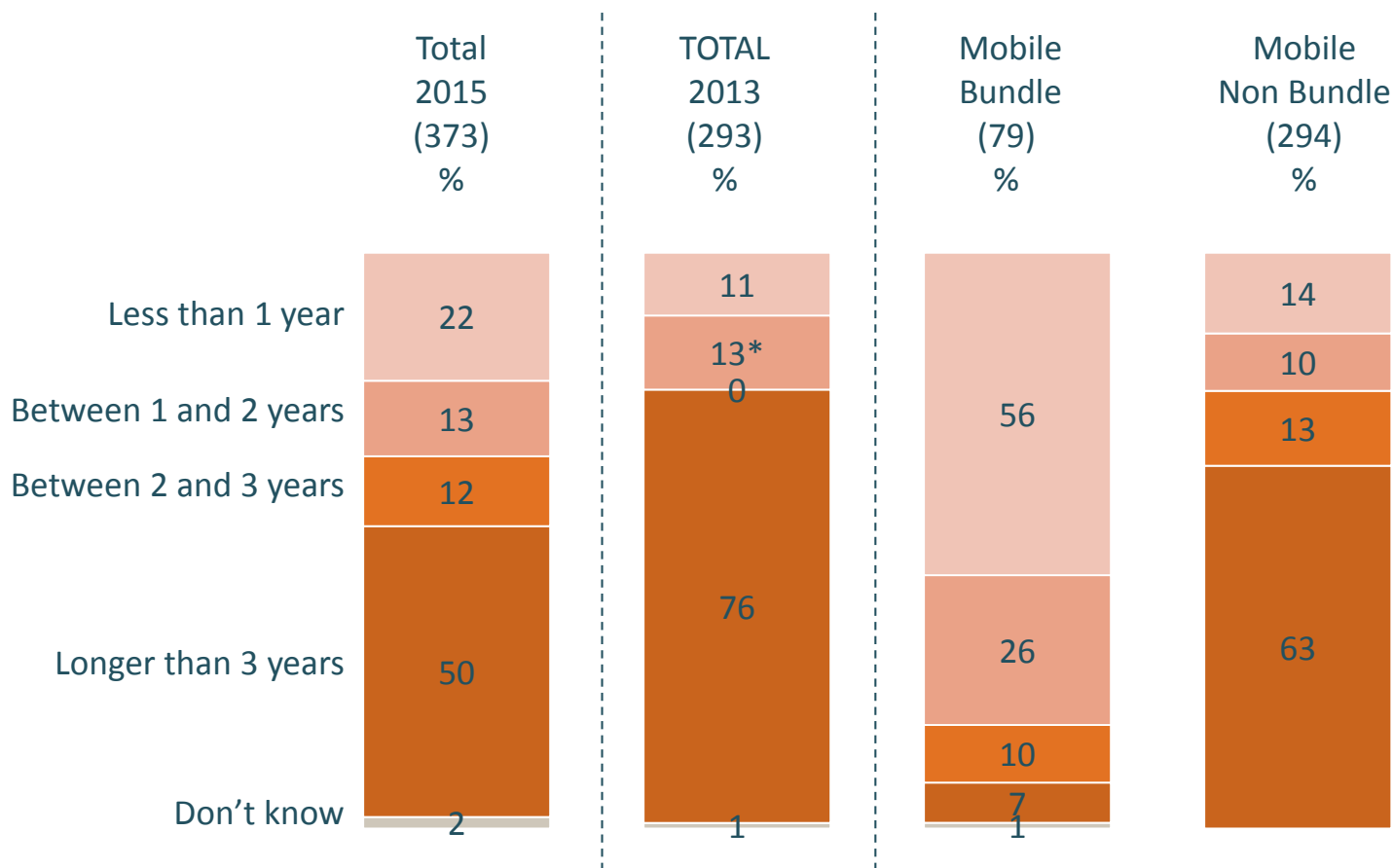
**small base*

Eircom's subscribers are less satisfied with their mobile phone service when compared to subscribers of other providers.



Length of time subscribed to mobile phone service

(Base: All Mobile Phone Subscribers (And Stated Provider) - 373)



*13% 2013 - 1-3 years

The length of time subscribed to a mobile phone service with the same operator has decreased since 2013. 50% of respondents have been with their mobile phone service provider for longer than 3 years compared with 76% in

2013.

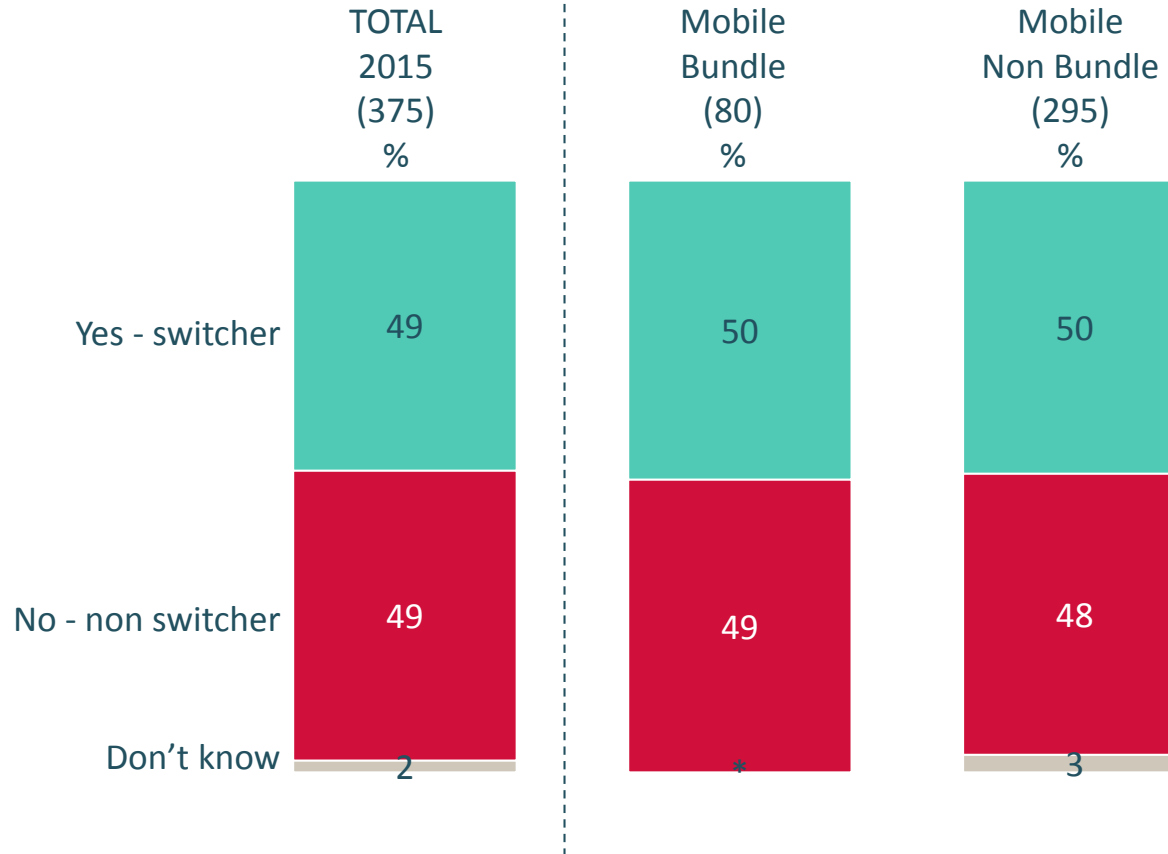
ICT Business Survey



(Q14C/Q39A)

Have you previously purchased your mobile phone service from a different service provider?

(Base: All Mobile Phone Subscribers - 375)



Switching questions asked in a different way 2013

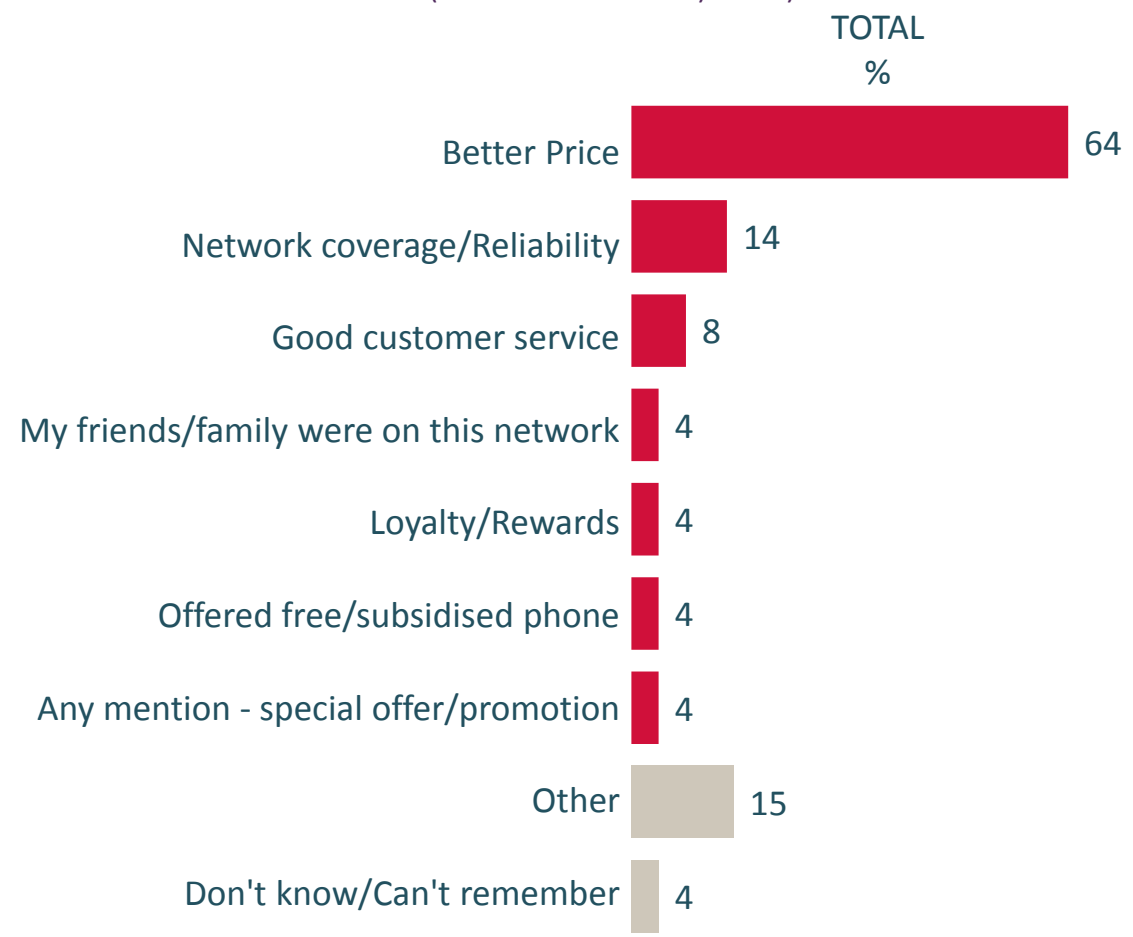
No difference in switching levels between Bundle and Non Bundle mobile subscribers.



(Q.14d/39b)
49

Why did you switch mobile phone service provider? – (switchers in the past 12 months only)

(Base: All Mobile Phone Subscribers Who Switched in Last Year (And Stated Provider) – 31*)



* Small base

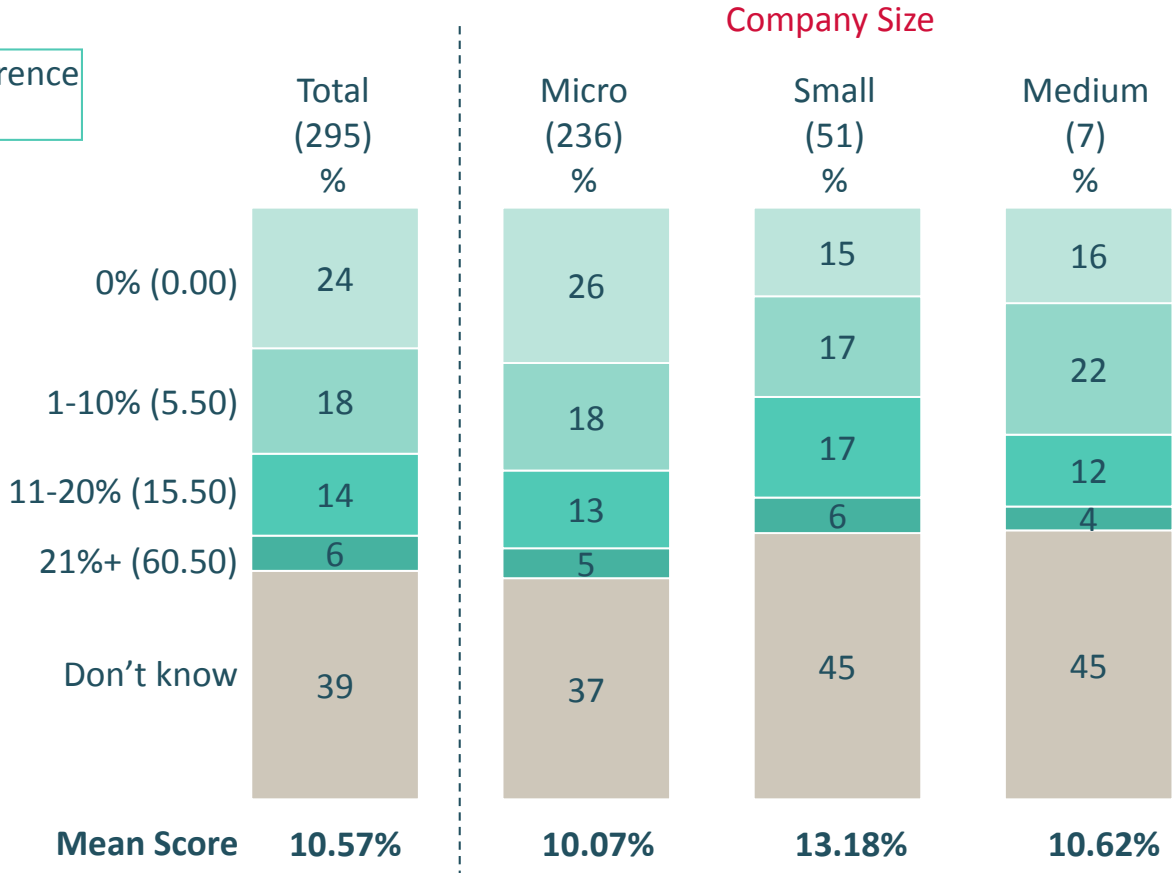
Similar to landline owners, better price is the main reason for switching among mobile phone service subscribers.



Perceived percentage savings on monthly bill if research a better deal

(Base: All Non Bundle Mobile Phone Subscribers - 295)

No Significant difference
By regions

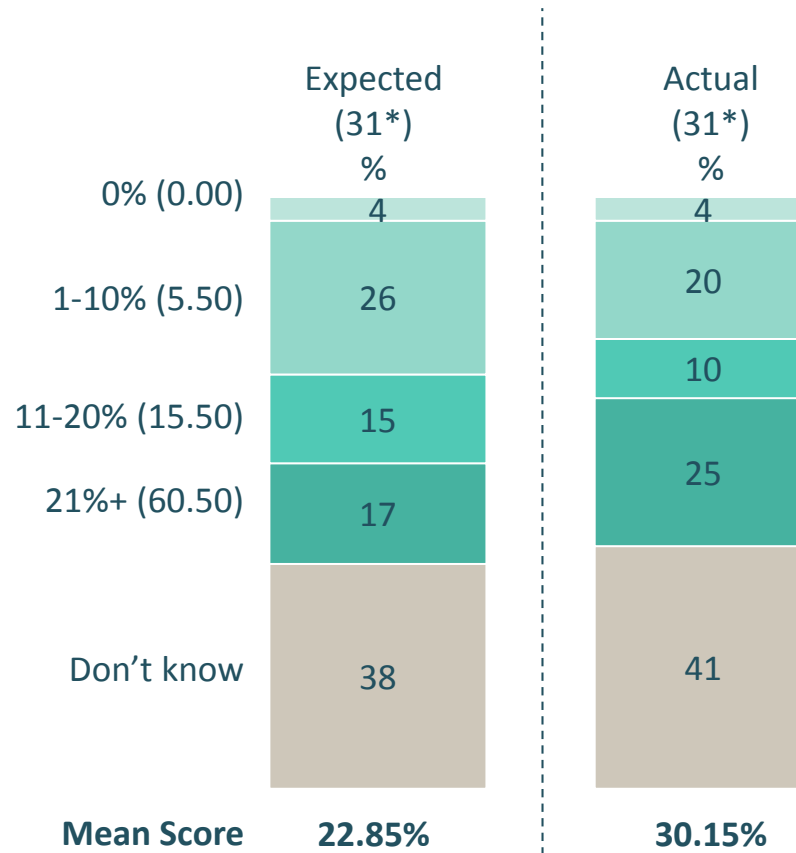


Average expected savings 11%. Expected savings are highest among small size businesses (13%).



Expected v actual savings received when switching mobile phone service provider (switchers in the past 12 months only)

(Base: All Non Bundle Mobile Phone Subscribers Who Switched In Past Year - 31)



* - small base

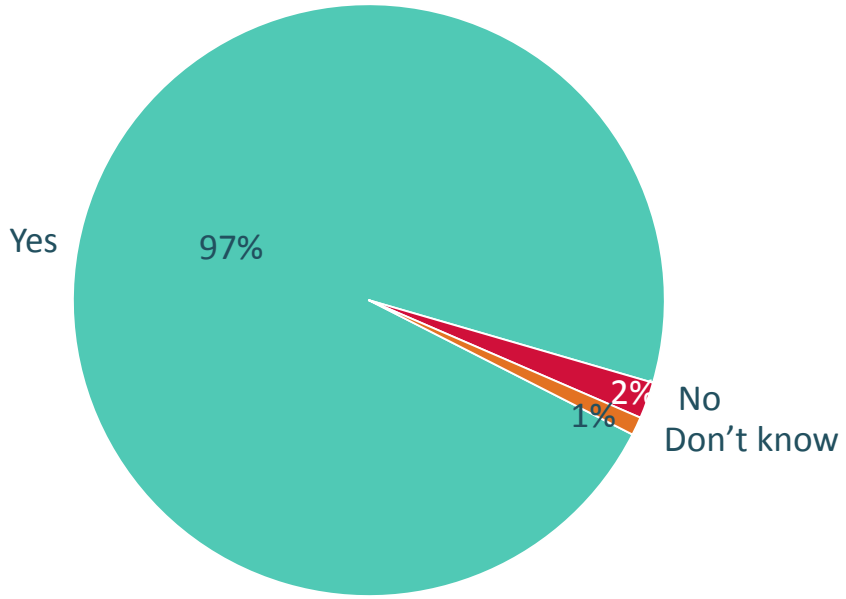
Actual savings were approximately 7% higher than expected savings among standalone mobile phone service subscribers who switched their provider in the past year.



(Q41/42)

Telephone number retention when switching mobile phone service provider

(Base: All Mobile Phone Switchers - 227)



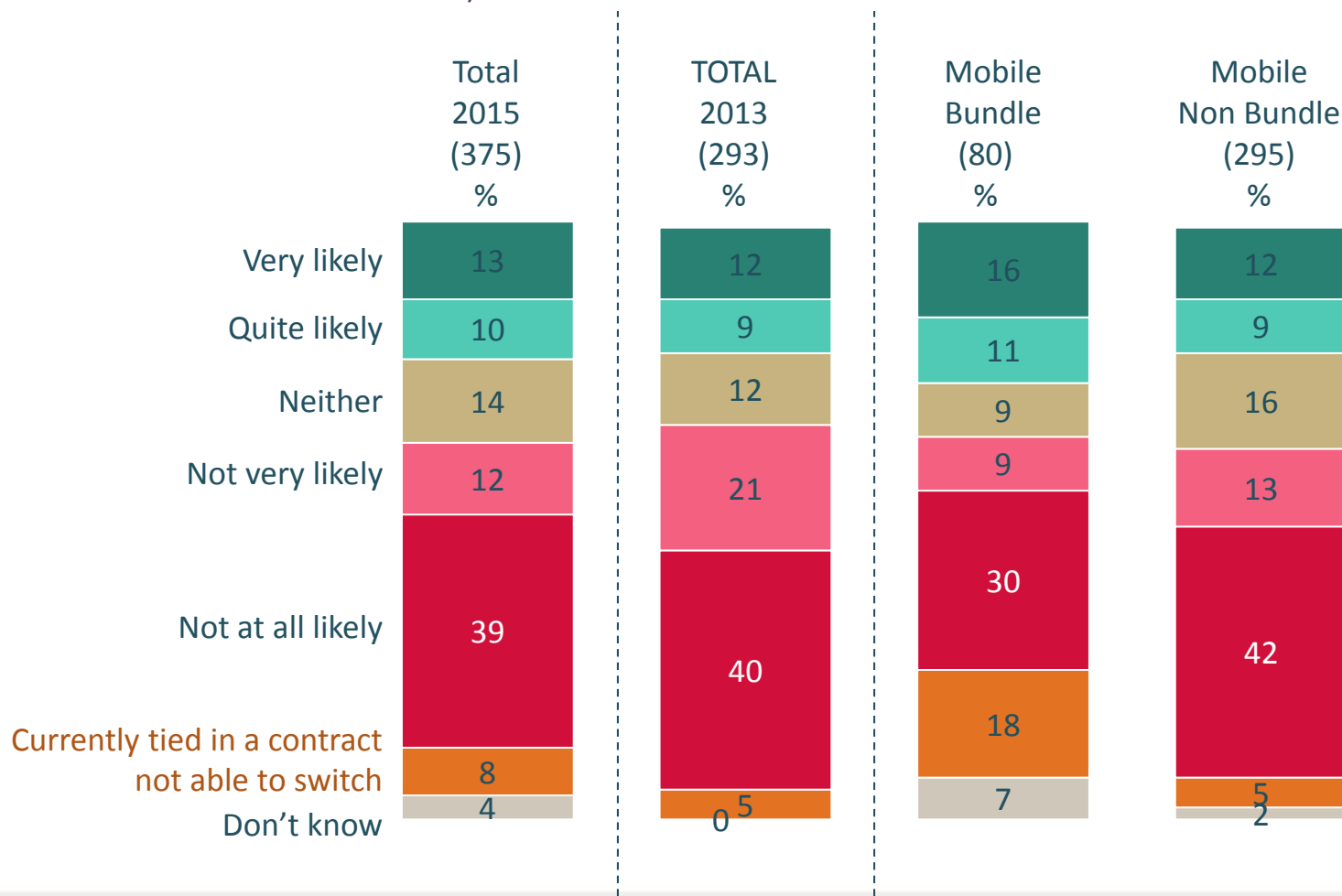
No difference by region or company size

Telephone number retention is also high among businesses purchasing mobile phone service with 97% of respondents stating that they have kept the same mobile phone number when switching service providers.



Likelihood to switch mobile phone service provider within the next 12 months

(Base: All Mobile Phone Subscribers – 375)

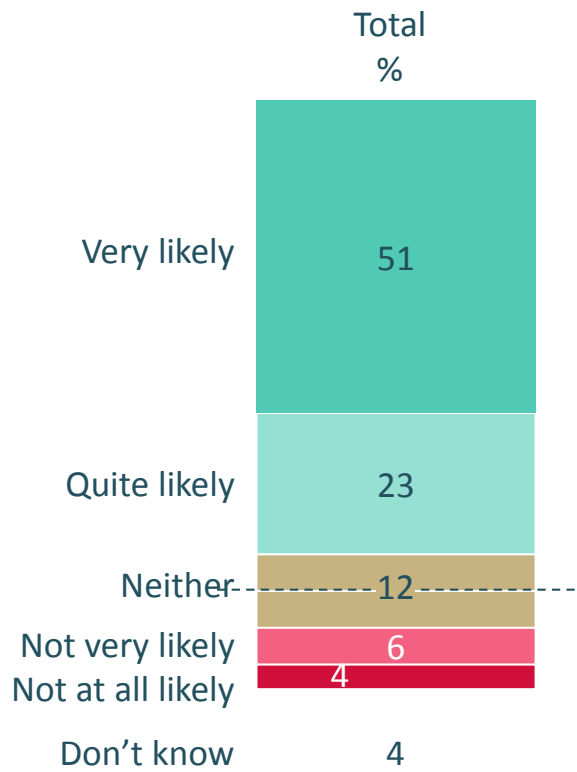


Likelihood to switch mobile phone service provider has changed little since 2013 (23% in 2015 v 21% in 2013).



Likelihood to purchase mobile phone service in a bundle with other services (mobile phone non – bundle likely switchers only)

(Base: All Non Bundle Mobile Phone Subscribers Likely To Switch – 62)



Nearly 75% of respondents (non bundle) intending to switch their mobile phone service provider are likely to purchase mobile phone service in a bundle with other services.



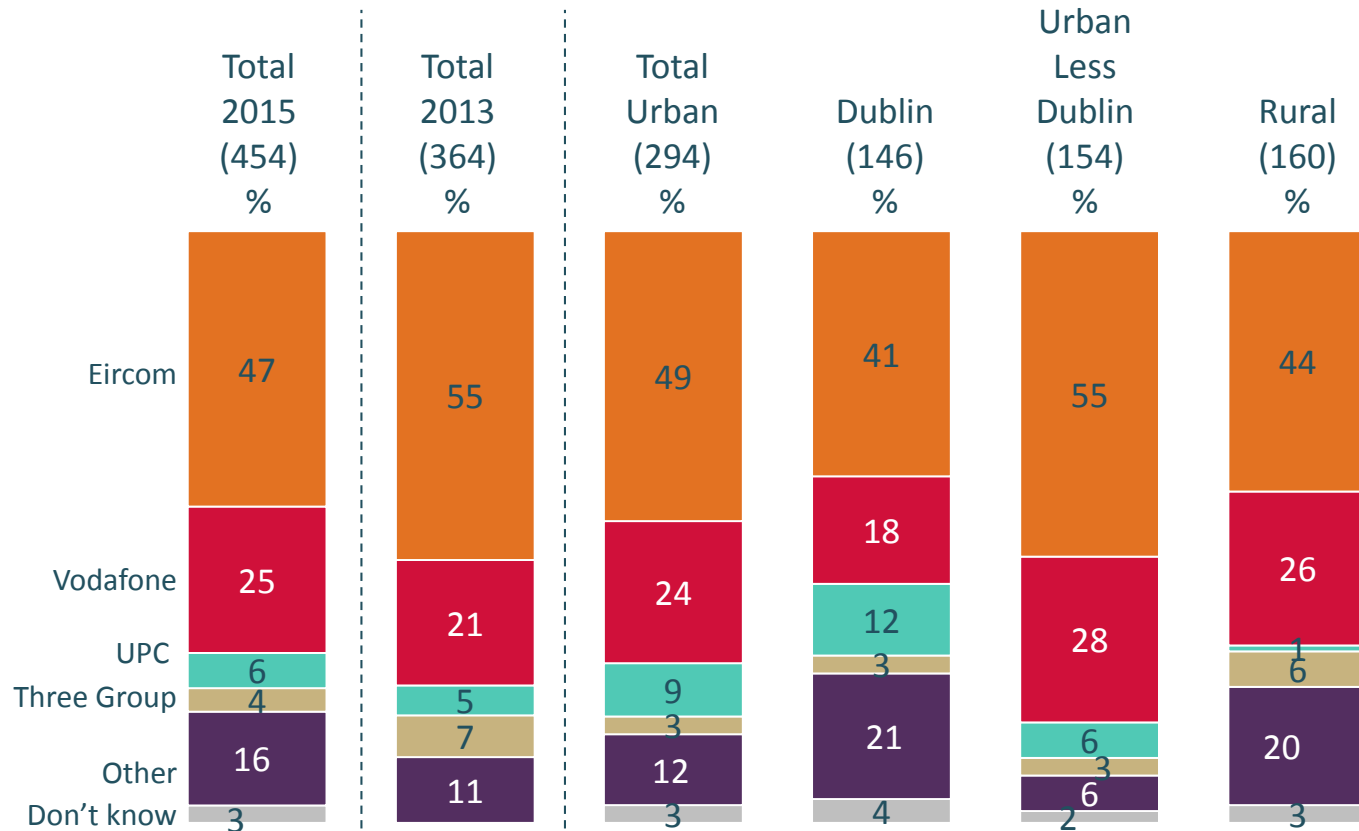


Fixed Broadband

Fixed broadband service provider

(Base: All Fixed Broadband Subscribers - 454)

AREA



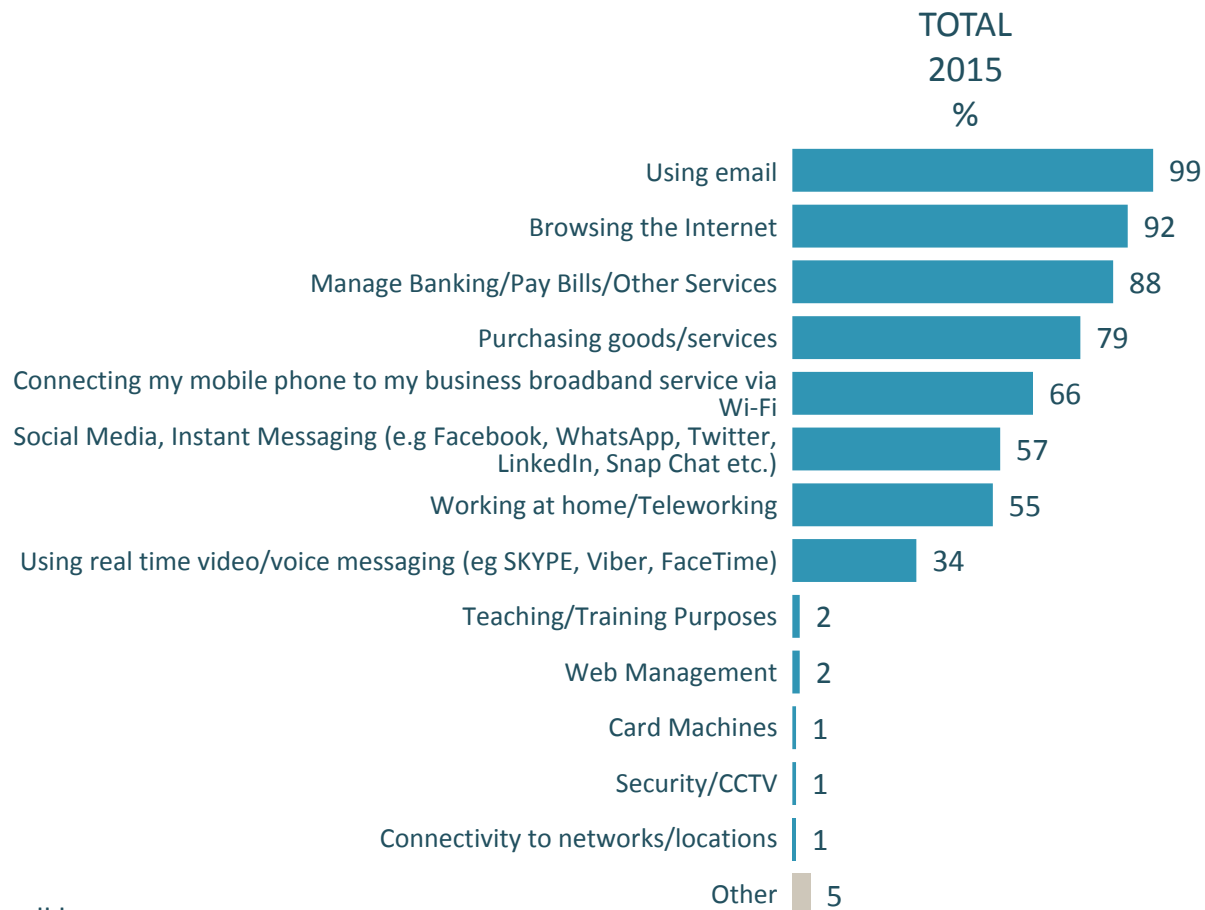
Other = Magnet/Imagine/Sky/Digiweb/Host Ireland/Irish Broadband

47% of all fixed broadband service subscribers purchase this service from Eircom (compared to 55% in 2013) with this figure falling to 41% in Dublin.



Use of fixed broadband service

(Base: All Fixed Broadband Subscribers – 454)



Company Size		
Micro (376) %	Small (68) %	Medium (10*) %
98	99	99
92	91	91
88	91	73
78	84	75
66	61	68
57	56	56
56	45	54
34	32	47
2	3	0
2	0	2
1	0	0
*	2	4
*	1	3
5	5	8

*small base

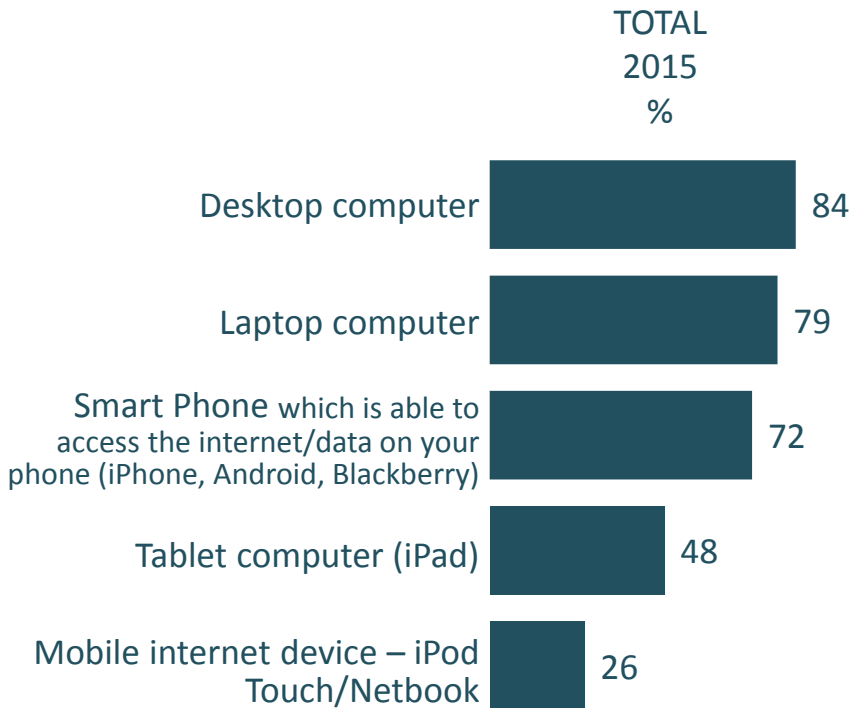
*No difference by region

Fixed broadband service is most commonly used for using email (99%) and browsing the Internet (92%) among business respondents.



Devices connected to fixed broadband service

(Base: All Fixed Broadband Subscribers – 454)



	Area -2015				Company Size -2015		
	Total Urban (294) %	Dublin (146) %	Urban Less Dublin (154) %	Rural (160) %	Micro (376) %	Small (68) %	Medium (10*) %
Desktop computer	84	83	84	85	82	98	88
Laptop computer	80	80	79	76	78	79	94
Smart Phone which is able to access the internet/data on your phone (iPhone, Android, Blackberry)	72	70	76	71	72	68	79
Tablet computer (iPad)	46	41	52	51	47	46	75
Mobile internet device – iPod Touch/Netbook	24	23	24	31	25	28	36

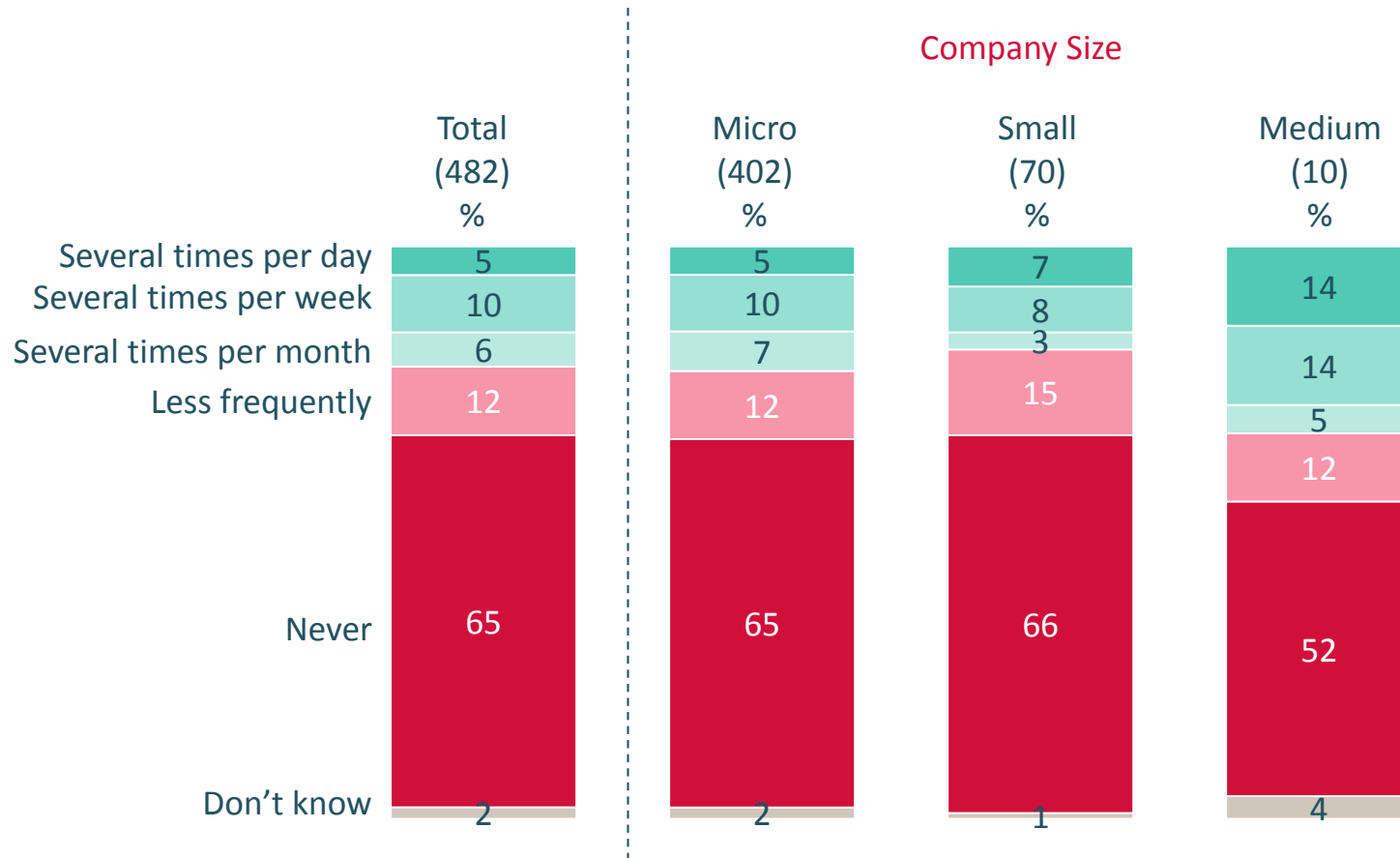
* Small base

Devices most likely connected to fixed broadband service are desktop computer (84%) followed by laptop computer (79%) and Smart Phone (72%).



Frequency of using VOIP services

(Base: All Mobile Phone Service & Fixed Broadband Subscribers – 482)



*No Difference By Region

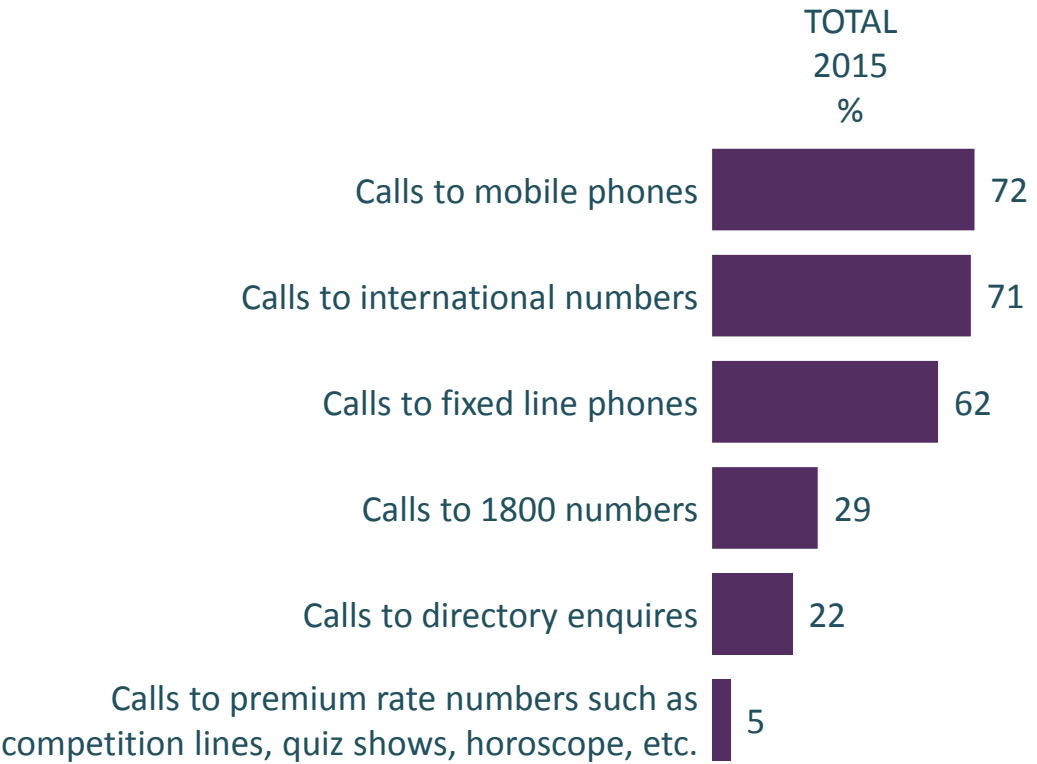
65% of respondents have never used VOIP services such as Skype or Viber. The use of VOIP is most common in Medium-sized companies with 45% stating that they have ever used this service.



(Q53)
60

Types of calls made using VOIP services

(Base: All VOIP Users - 160)



Company Size		
Micro (133) %	Small* (23) %	Medium* (4) %
73	65	67
74	50	90
63	56	79
29	28	28
23	16	23
5	5	3

*small base

Calls to mobile phones (72%) and international numbers (71%) are most common among businesses using VOIP services.



Impact of VOIP service usage on use of traditional voice calls

(Base: All VOIP Users - 160)

Q.55 Has the usage of voice over broadband service, such as SKYPE/FaceTime/Viber to make a phone call for business purposes impacted your and other employees' usage of traditional voice calls over business mobile phone and or landline phone?



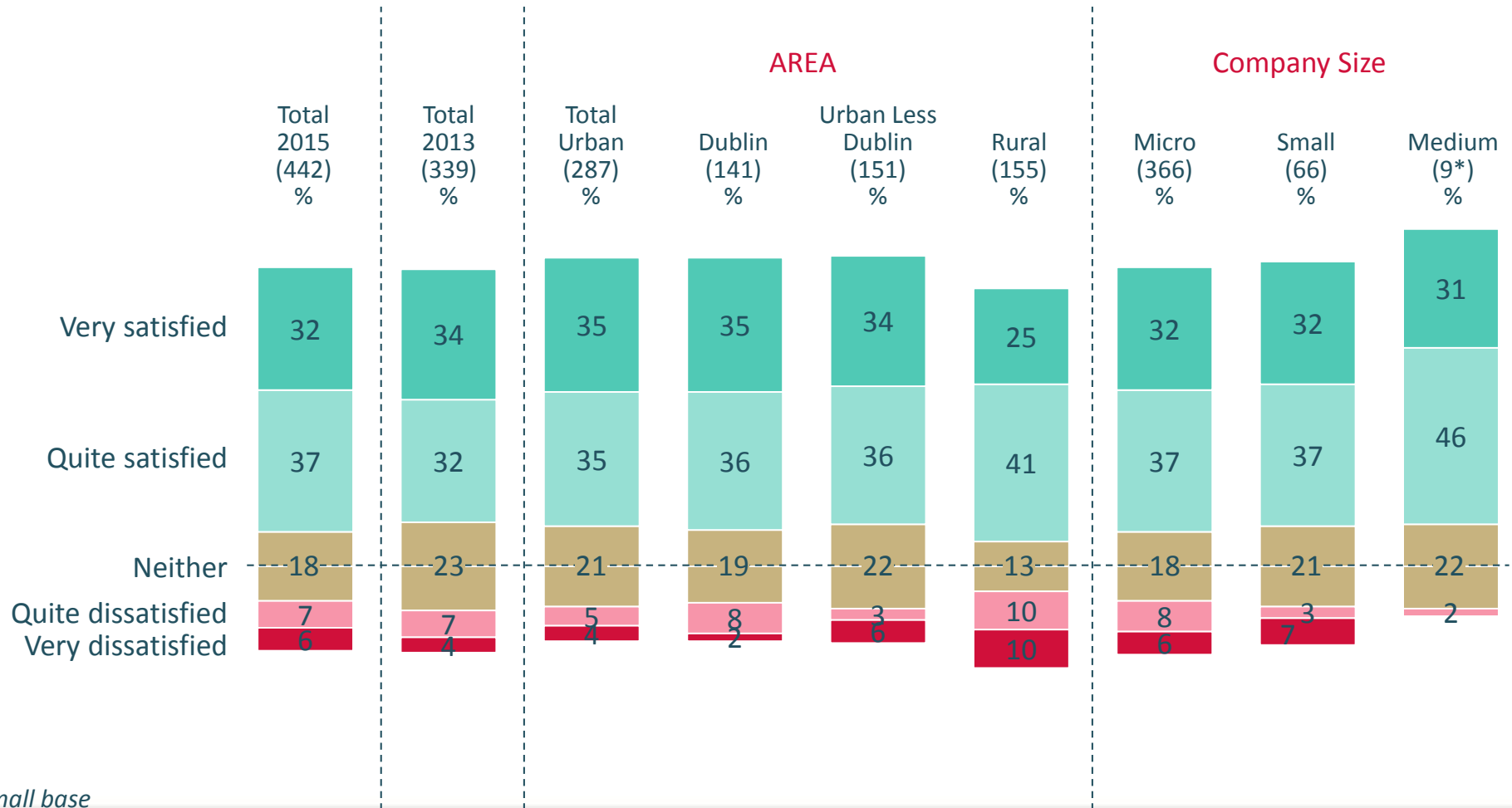
**small base*

37% of businesses using VOIP services claim to still make the same volume of traditional calls with remaining respondents noting that they have reduced the number of calls they make via mobile and/or landline phone.



Satisfaction with fixed broadband service - I

(Base: All Fixed Broadband Subscribers (And Stated Provider) - 442)



*small base

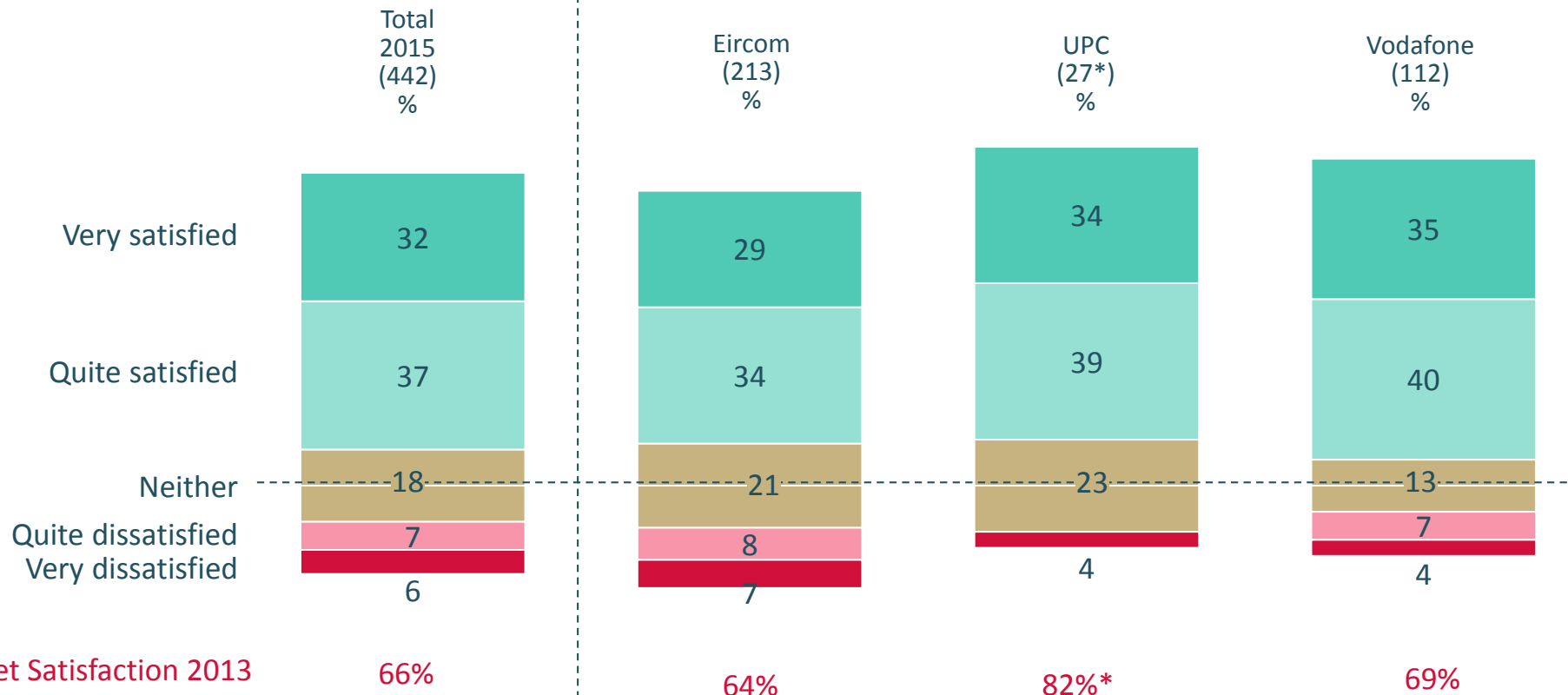
Slight increase in satisfaction with fixed broadband service since 2013 (69% in 2015 versus 66% in 2013). Medium-sized companies are most satisfied (77%) while rural businesses are least satisfied (66%).



Satisfaction with fixed broadband service - II

(Base: All Fixed Broadband Subscribers (And Stated Provider) - 442)

Fixed Broadband Service Provider



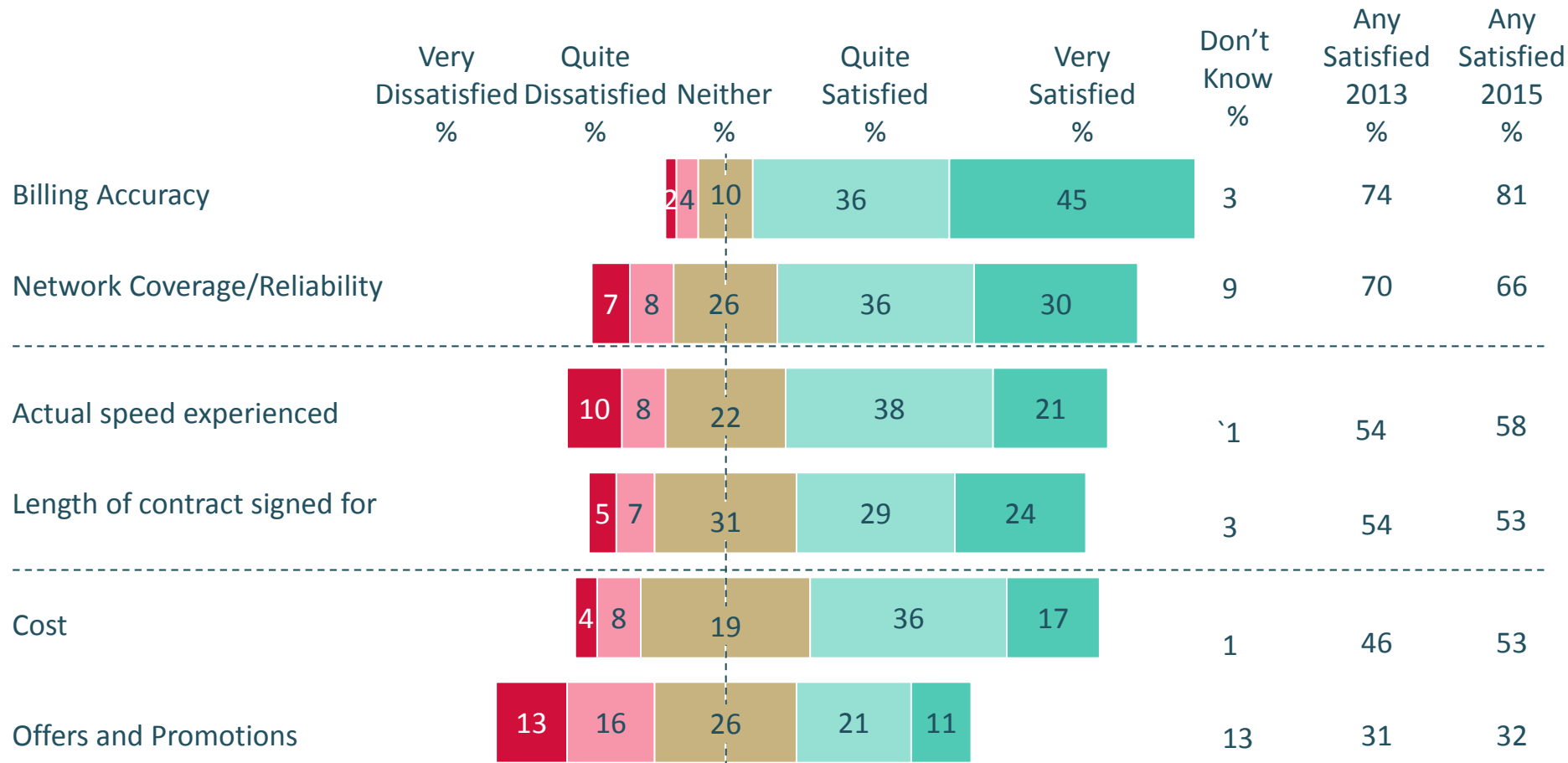
*small base

Satisfaction with fixed broadband service is highest among Vodafone subscribers (75%), followed by UPC (73%) and eircom (63%).



Satisfaction with elements of fixed broadband service: summary

(Base: All Fixed Broadband Subscribers (And Stated Provider) - 442)

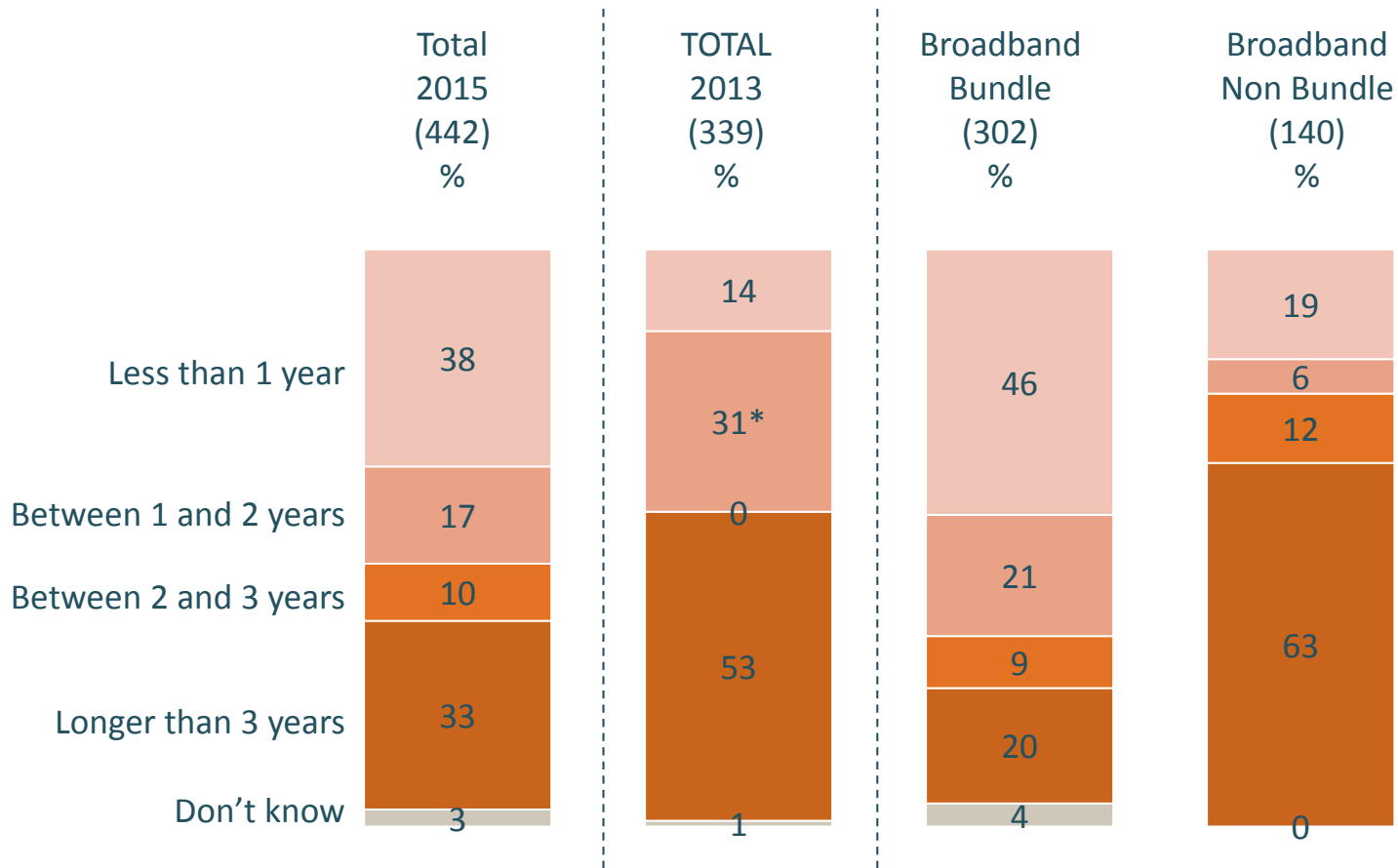


Satisfaction has increased with billing accuracy (81% in 2015 v 74% in 2013), speed (58% in 2015 v 54% in 2013) and Cost (53% in 2015 from 46% in 2013) elements of fixed broadband service.



Length of time subscribed to fixed broadband service

(Base: All Fixed Broadband Subscribers (And Stated Provider) – 442)



*31% 2013 - between 1 and 3 years

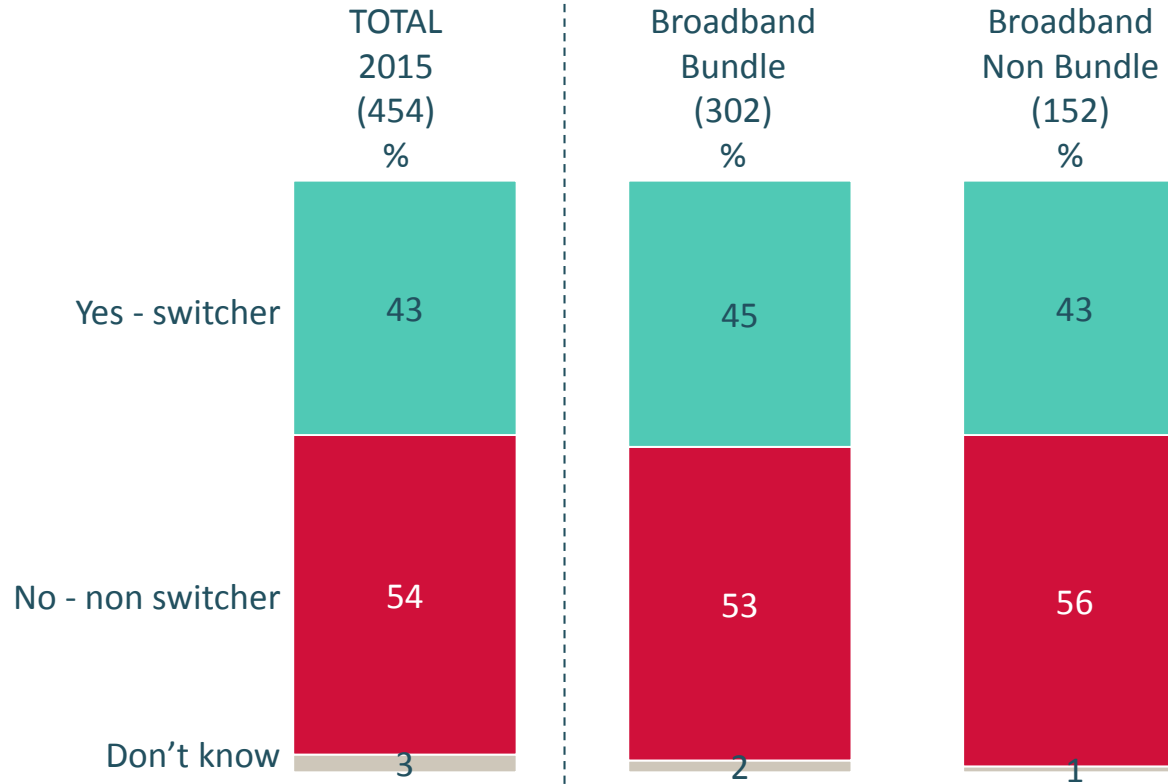
The length of time subscribed to a fixed broadband service with the same service provider has decreased since 2013. 38% of respondents have been with their fixed broadband service provider for less than 1 year compared with 14% in 2013.



(Q14C/Q57a)

Have you previously purchased your fixed broadband service from a different service provider?

(Base: All Fixed Broadband Subscribers - 454)



Switching questions asked in a different way 2013

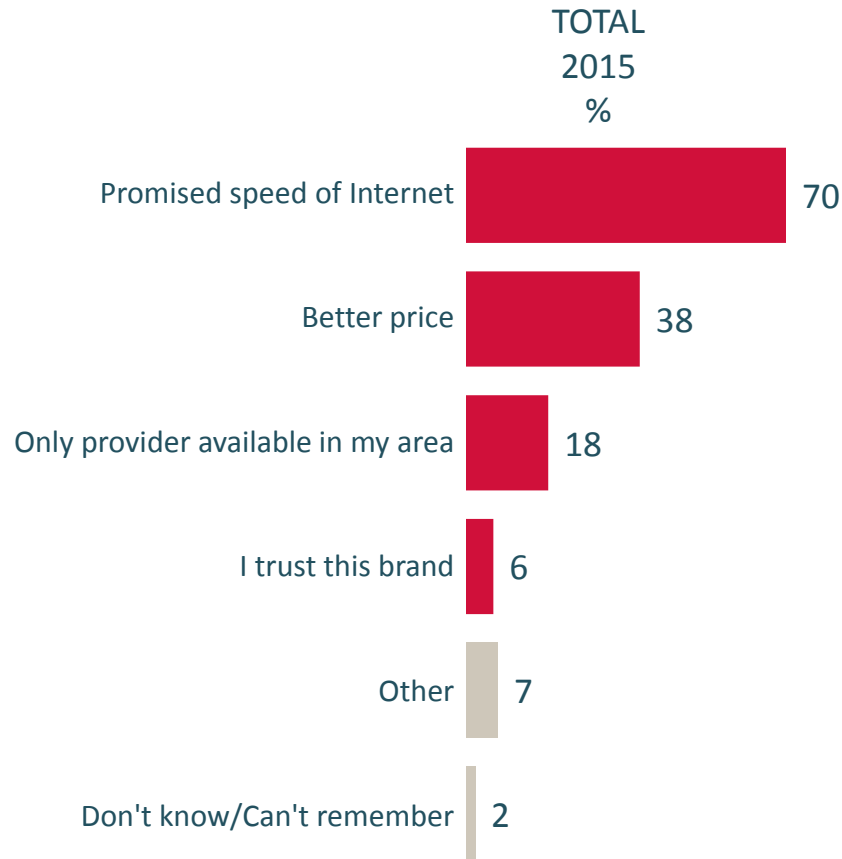
Little difference in switching levels between Bundle (45%) and Non Bundle (43%) broadband subscribers.



(Q.14d/57b)

Why did you switch fixed broadband service provider? – (switchers in the past 12 months only)

(Base: All Fixed Bb Subscribers Who Switched in Last Year (And Stated Provider) – 21*)



*Note: Small Base Size

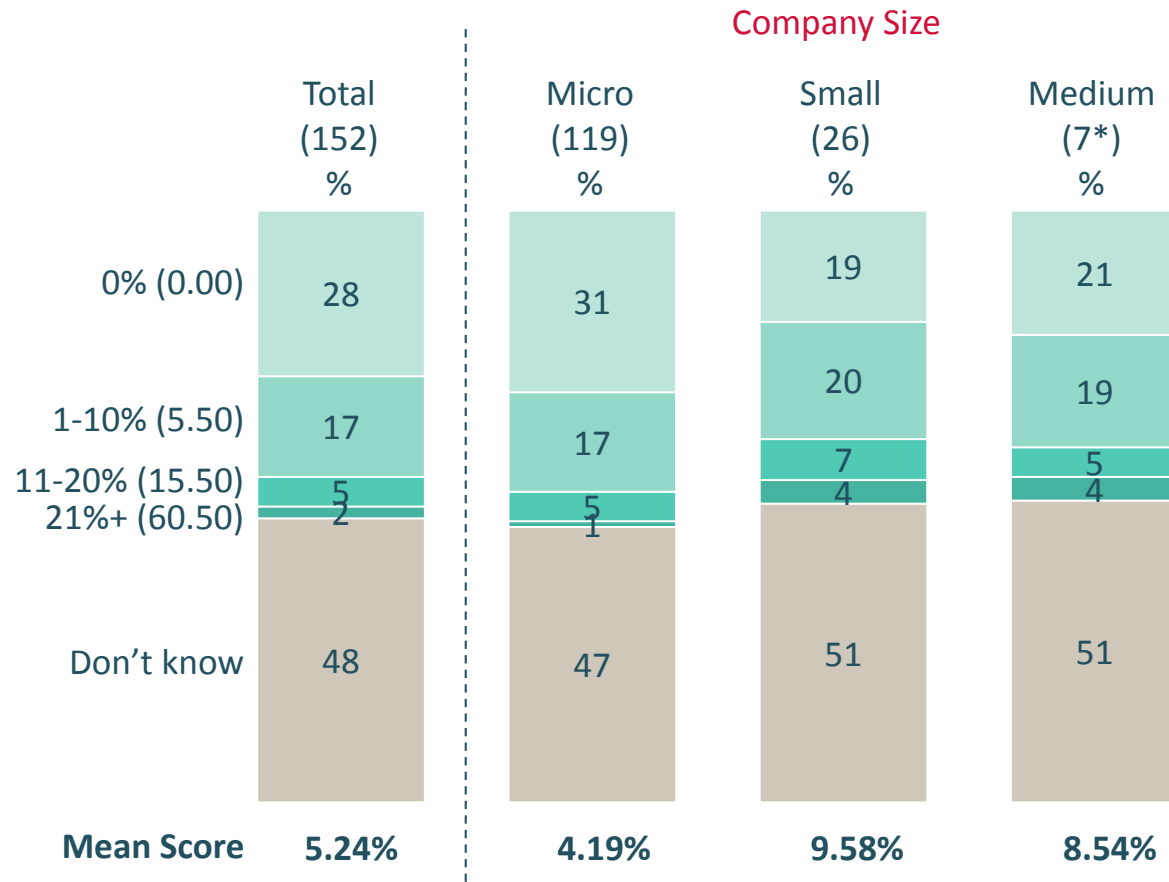
Broadband/Internet Speed (70%) and Better Price (38%) are the main reasons for switching suppliers.

REDC

(Q 15/58)
68

Perceived percentage savings on monthly bill if the best deal was obtained

(Base: All Non Bundle Fixed Broadband Subscribers - 152)



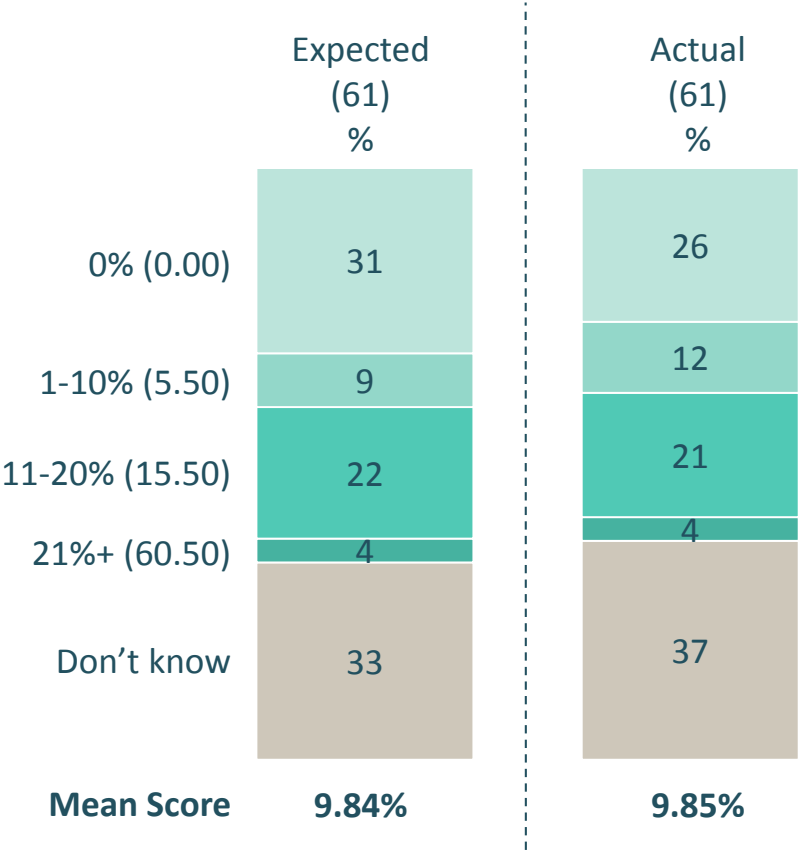
* Small base

Average expected savings if the best deal on fixed broadband service was obtained equalled to 5%. Higher for small companies (10%) and medium size companies (9%)



Expected v actual savings received when switching fixed broadband service provider (switchers in the past 12 months only)

(Base: All Non Bundle Fixed Broadband Switchers Who Switched In The Past Year - 61)

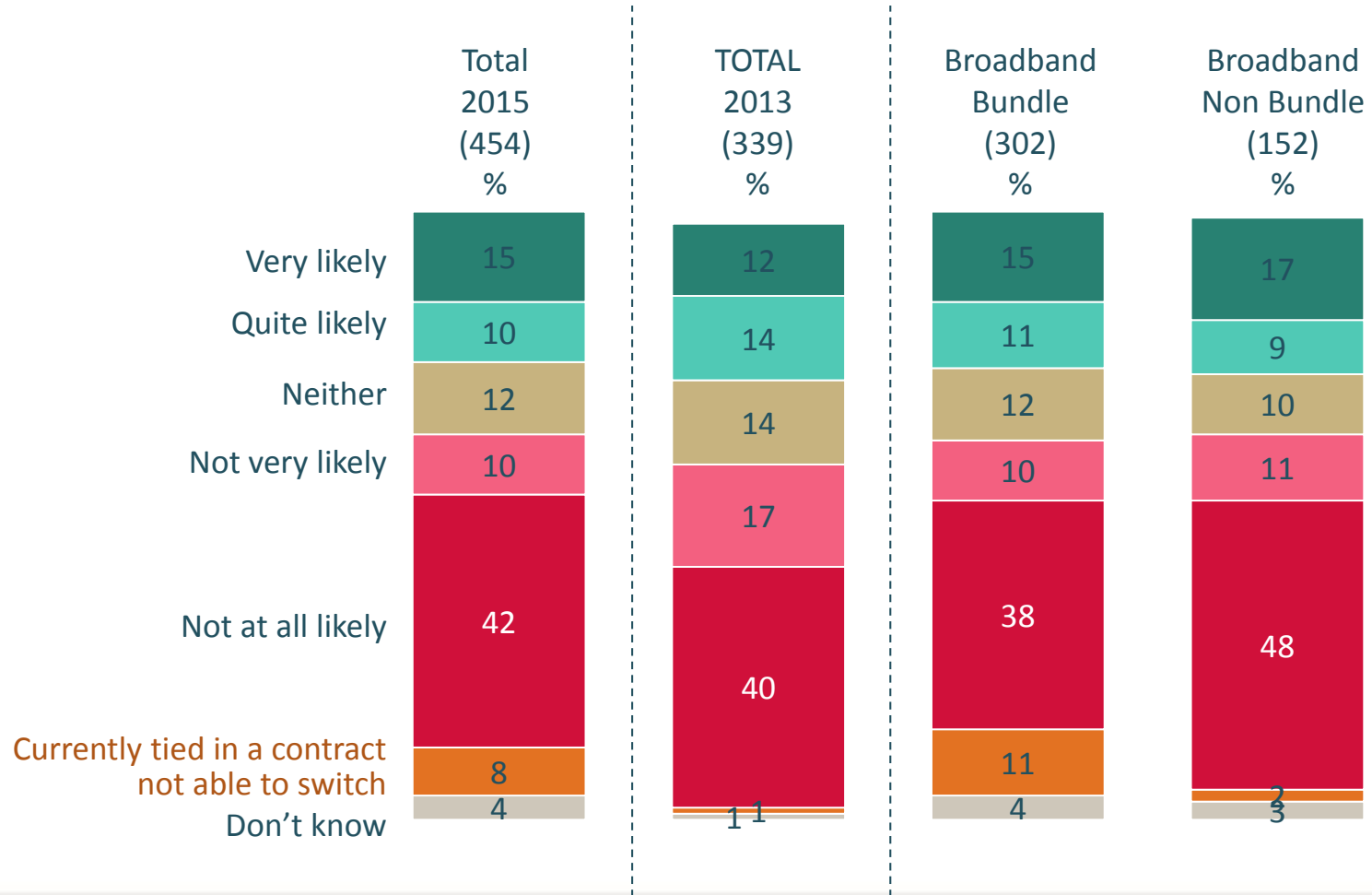


Expected savings and actual savings received are broadly similar.



Likelihood to switch fixed broadband service provider within the next 12 months

(Base: All Fixed Broadband Subscribers - 454)

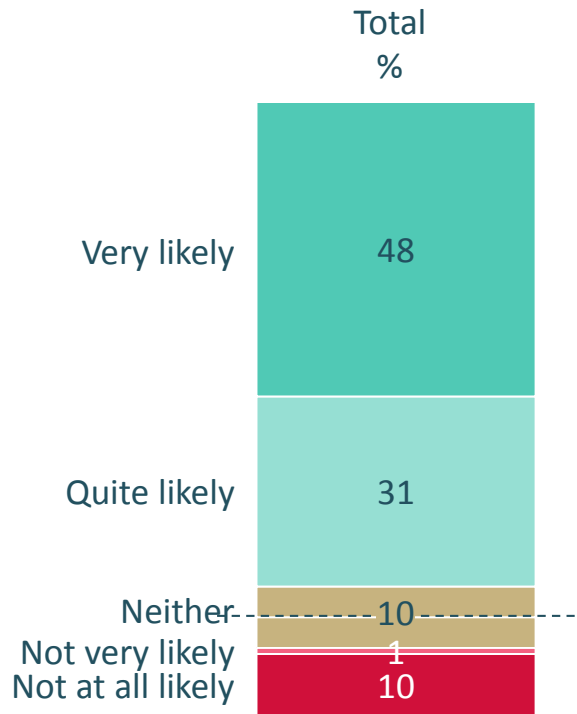


Likelihood to switch fixed broadband service provider has changed little since 2013 (25% in 2015 v 26% in 2013).



Likelihood to purchase a fixed broadband bundle when you switch provider next time?

(Base: All Non-bundle Fixed Broadband Subscribers Likely To Switch – 37*)



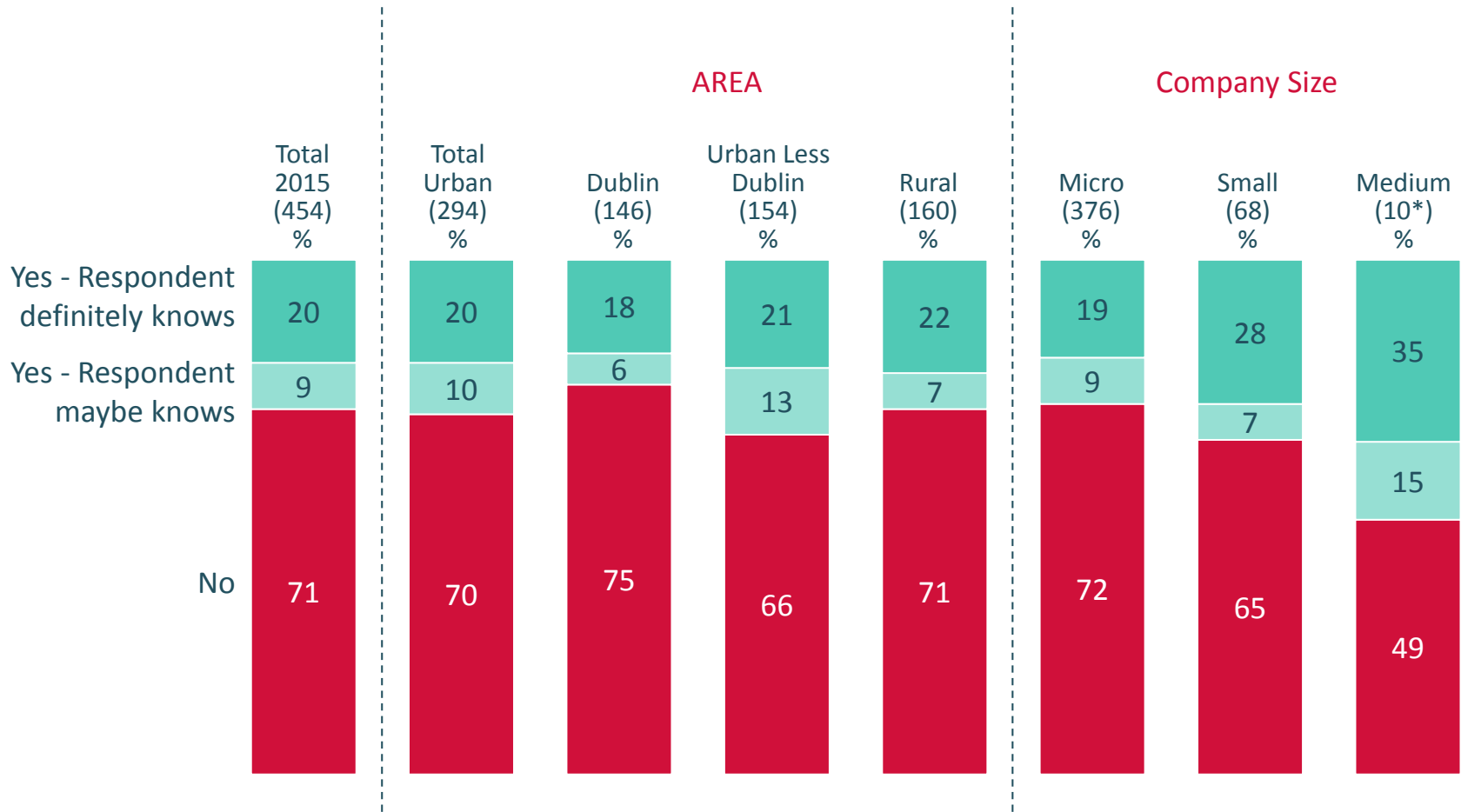
(* - small base)

79% of standalone fixed broadband service subscribers who are likely to switch service provider has stated that they are likely to purchase a broadband bundle if they decide to switch their service provider.



Awareness of fixed broadband service download speeds

(Base: All Fixed Broadband Subscribers - 454)



*small base

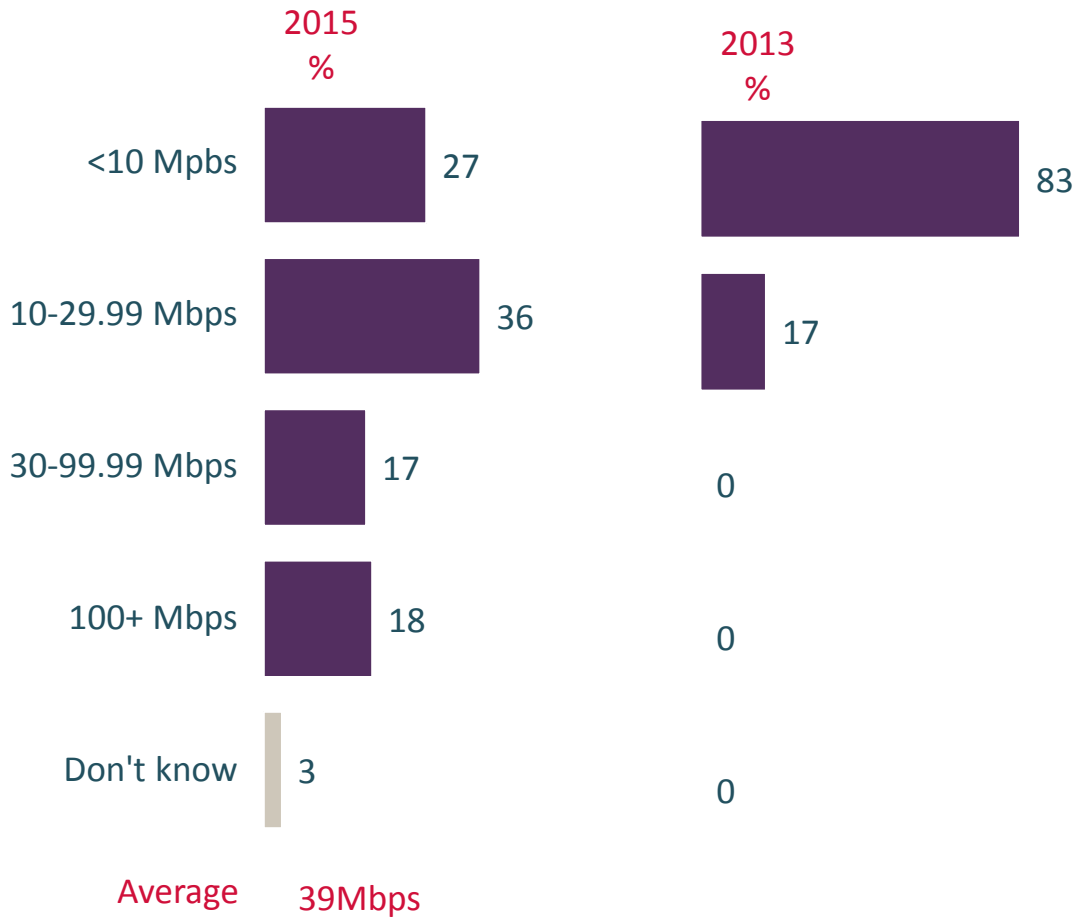
71% of Irish SMEs are unaware of the download speed of their fixed broadband service (compared to 70% in 2013). Awareness of received download speeds grows with company size.



(Q.63)

Stated maximum download speed

(Base: All Fixed Broadband Subscribers (Aware Of Download Speed) – 133)



Region			
Dublin %	Total Urban %	Urban less Dublin %	Rural %
17	17	19	45
35	36	36	36
7	17	24	16
35	25	19	3
6	4	2	0

Average by Region: Dublin 62Mbps, Total Urban 50Mbps, Urban less Dublin 41Mbps, Rural 18Mbps

Stated download speeds are significantly higher among Dublin businesses at 62Mbps versus in Rural Ireland at 18Mbps.

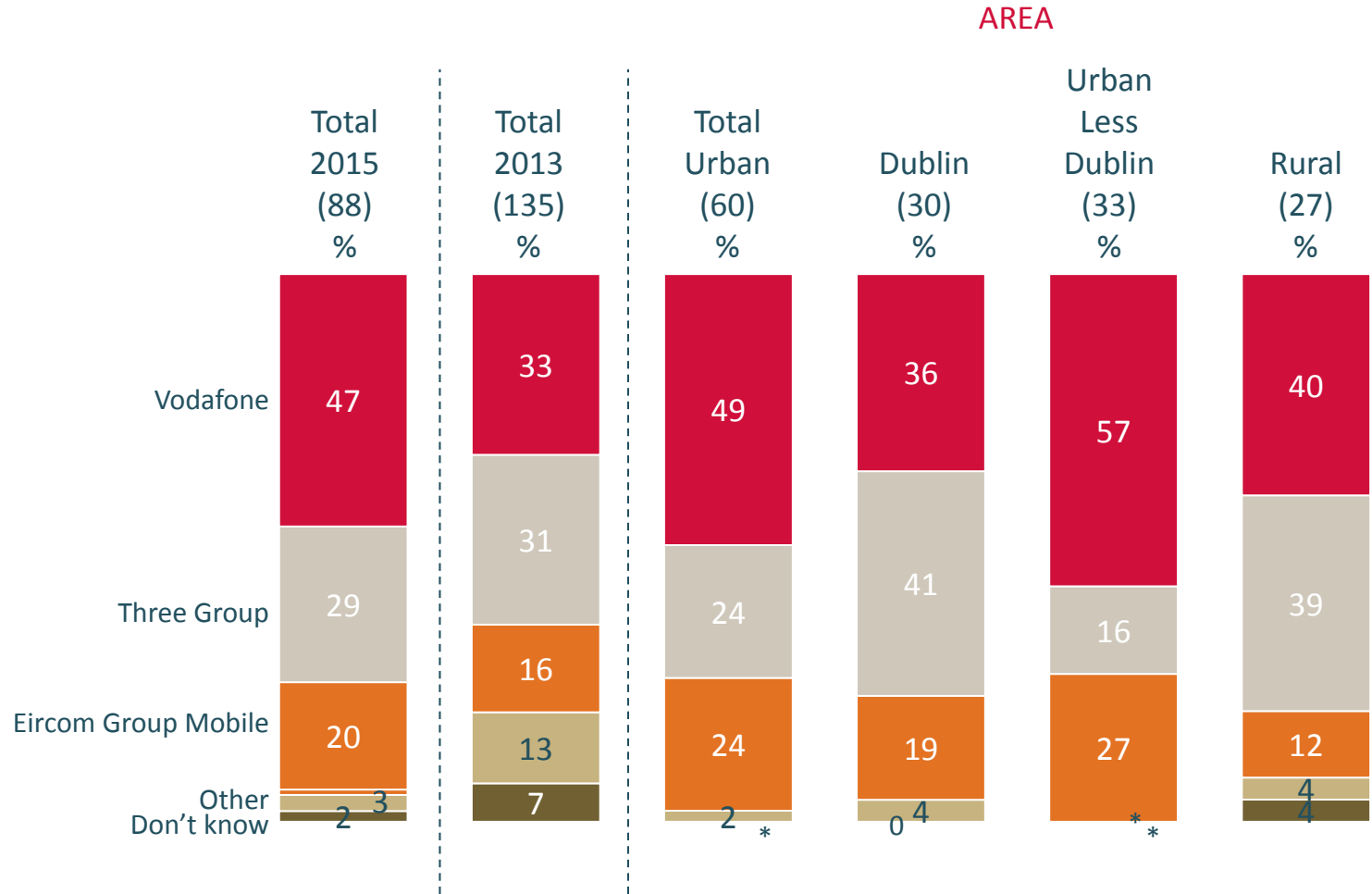




Mobile Broadband

Mobile broadband service provider

(Base: All Mobile Broadband Subscribers - 88)

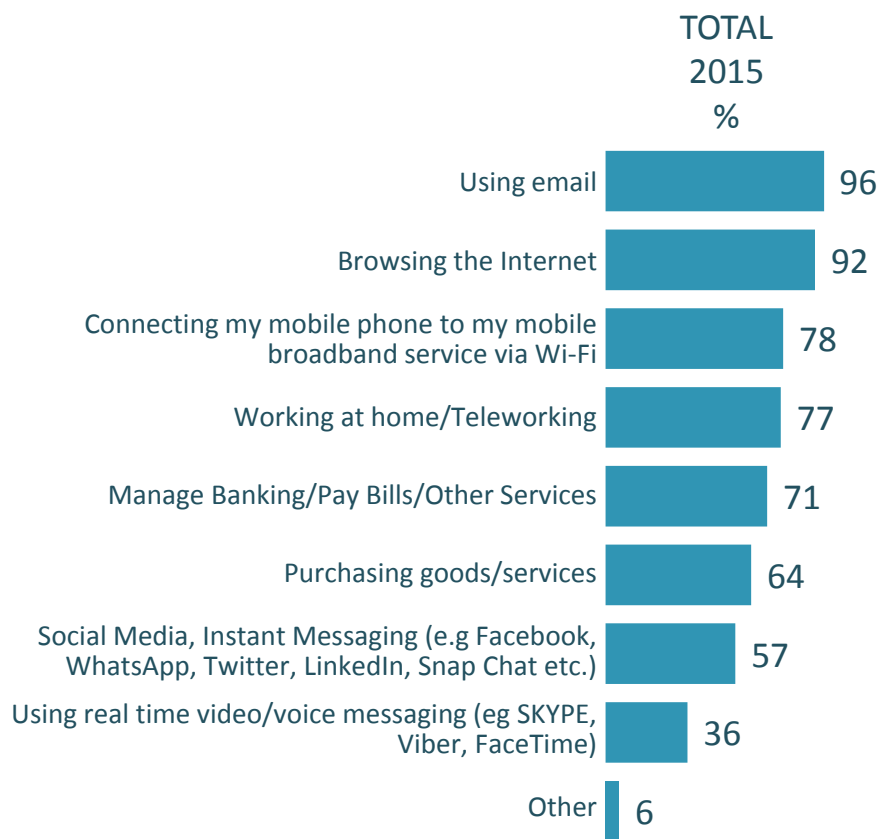


47% of all mobile broadband subscribers purchase this service from Vodafone (compared to 33% in 2013).



Use of mobile broadband service

(Base: All Mobile Broadband Subscribers - 88)



Area - 2015				Company Size -2015		
Total Urban (60) %	Dublin* (30) %	Urban Less Dublin* (33) %	Rural* (27) %	Micro (66) %	Small* (19) %	Medium* (3) %
96	96	97	96	97	94	100
91	99	86	94	93	90	100
80	82	80	72	81	68	66
71	73	71	90	75	80	83
67	65	73	78	73	64	51
62	65	63	69	64	66	54
58	58	55	55	57	56	62
34	38	37	39	36	31	56
7	7	6	4	4	15	11

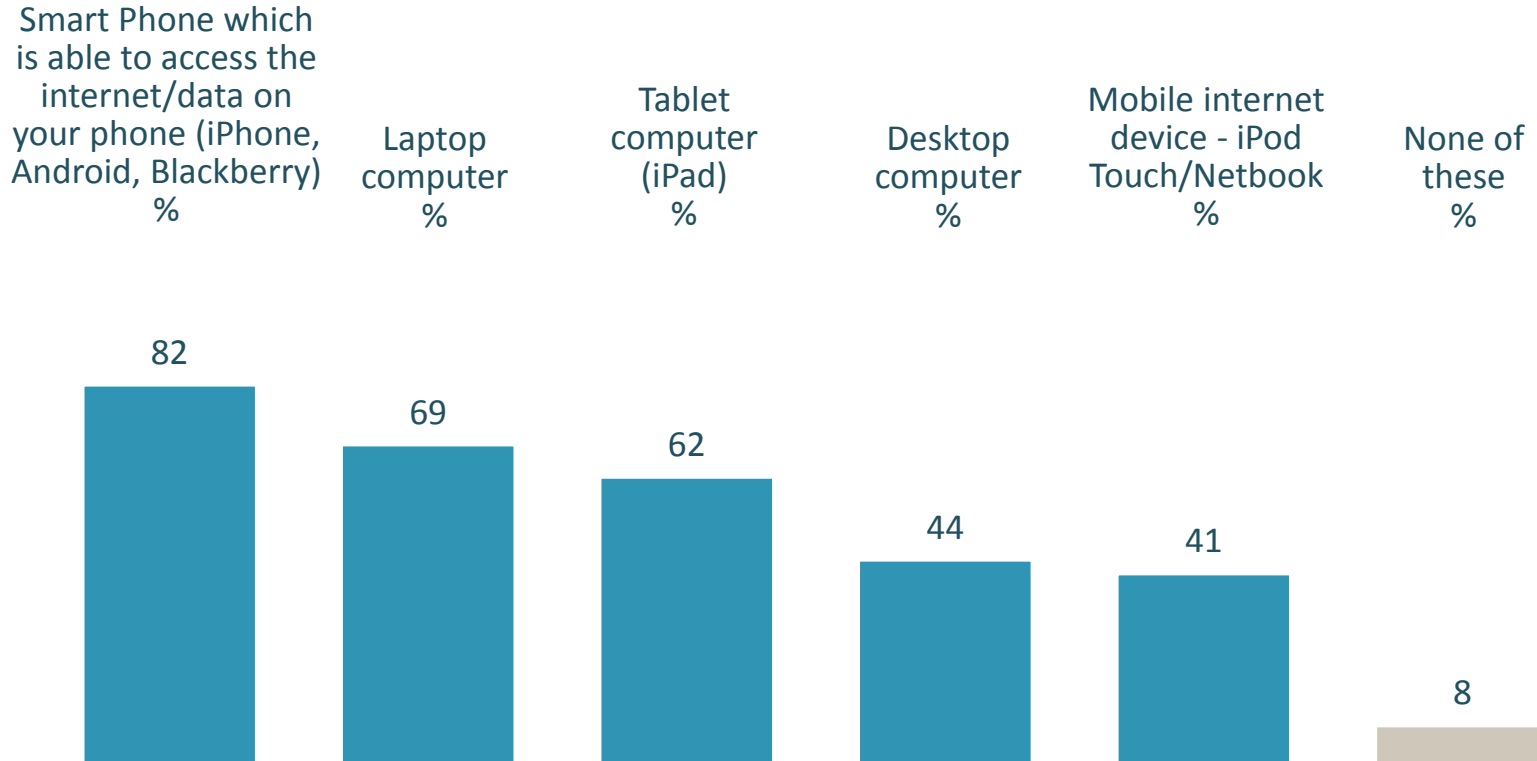
*Note: Small Base Size

Mobile broadband service is most commonly used for using email (96%) and browsing the Internet (92%). However, in rural areas, using mobile broadband for working at home/teleworking is also very common (90%).



Devices connected to mobile broadband service

(Base: All Mobile Broadband Subscribers - 88)

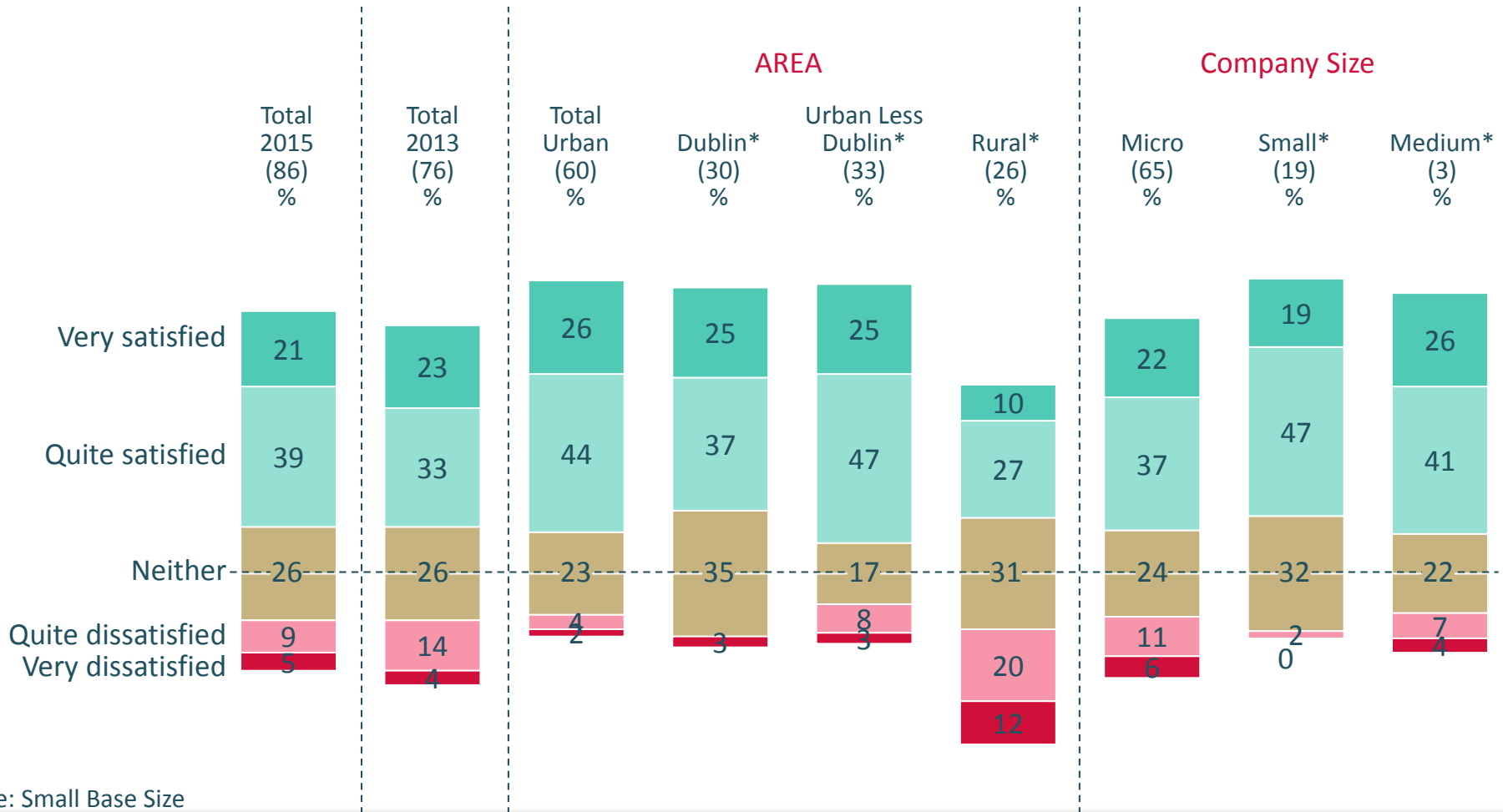


Smart Phone is the most common device connected to a mobile broadband service (82%), followed by laptops (69%) and tablets (62%).



Satisfaction with mobile broadband service

(Base: All Mobile Broadband Subscribers (And Stated Provider) - 86)



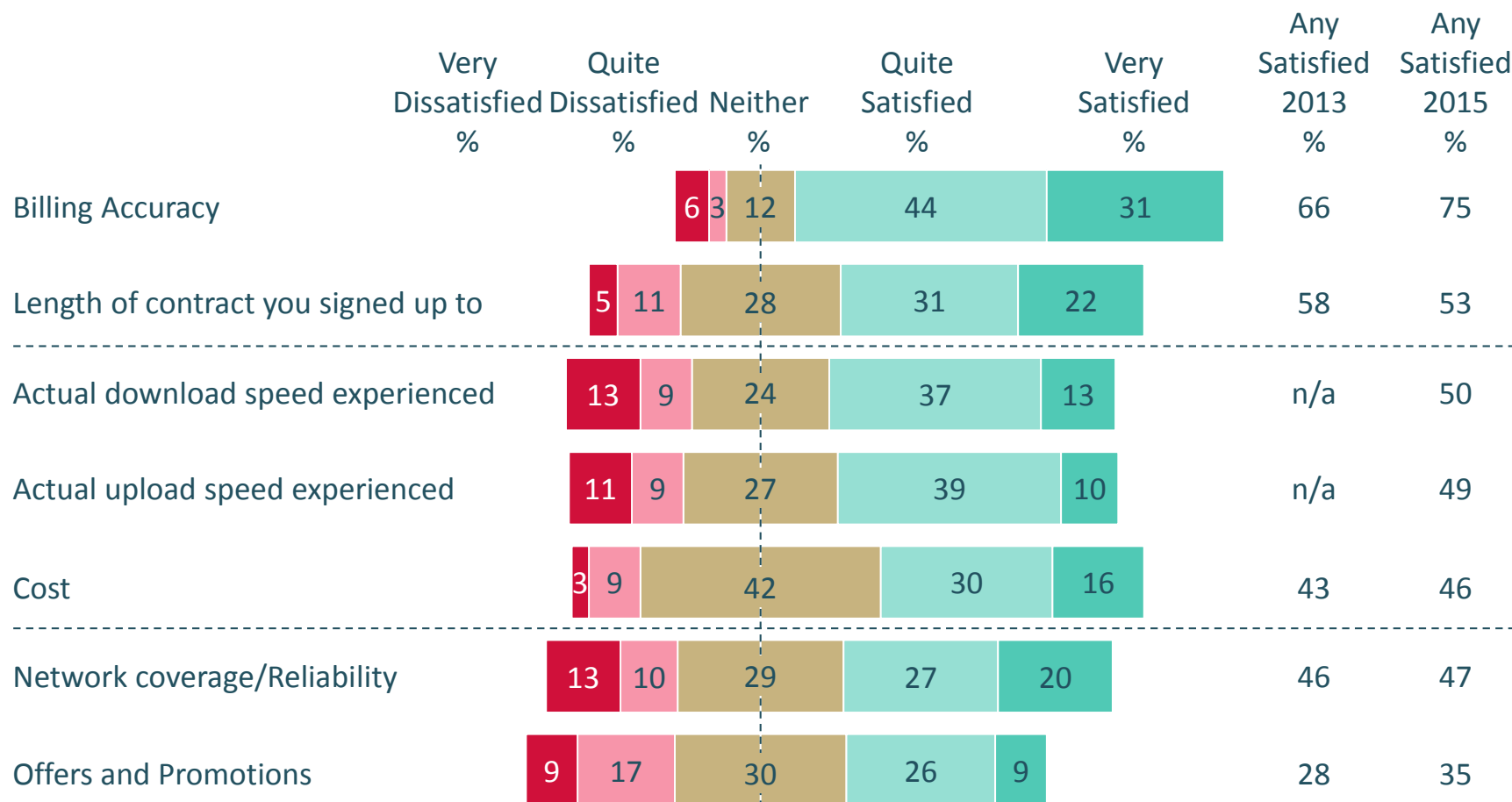
*Note: Small Base Size

Overall satisfaction with mobile broadband service is higher in 2015 (60% compared to 56% in 2013). However, satisfaction is particularly low in rural areas (37%).



Satisfaction with elements of mobile broadband service: summary

(Base: All Mobile Broadband Subscribers (And Stated Provider) - 86)

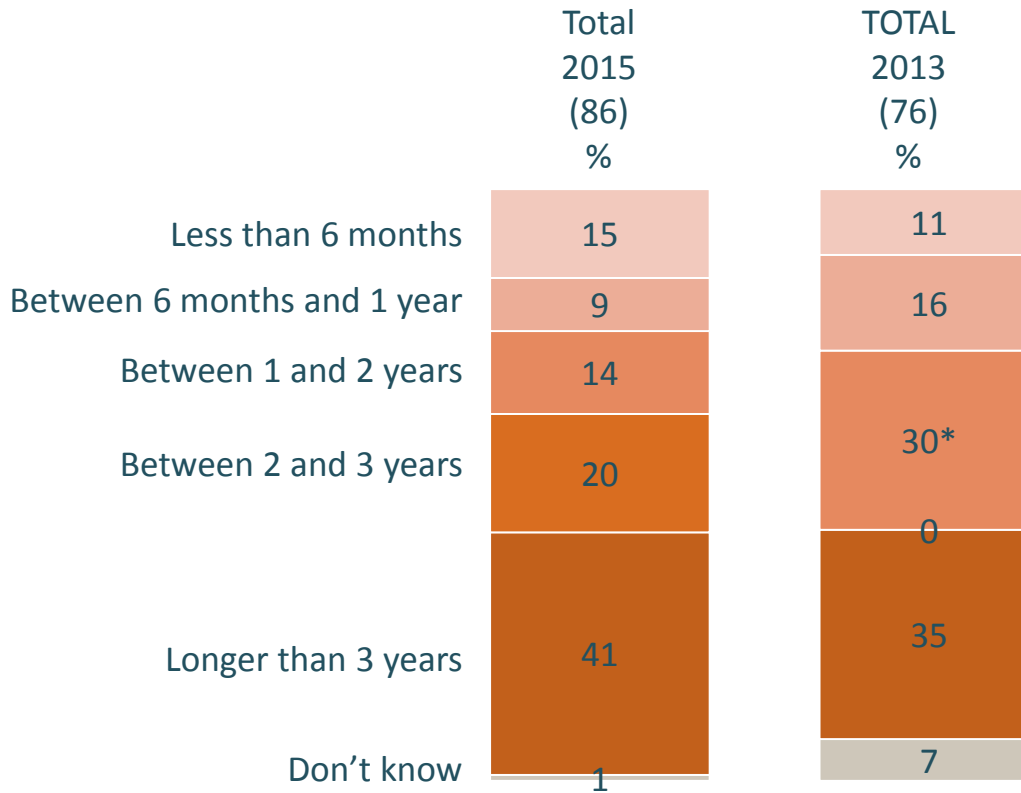


Satisfaction has increased in terms of Billing accuracy (75% in 2015 versus 66% in 2013). Satisfaction with offers and promotions has also increased (35% in 2015 versus 28% in 2013).



Length of time subscribed to mobile broadband service

(Base: All Mobile Broadband Subscribers (And Stated Provider) – 86)



*2013 = between 1 and 3 years

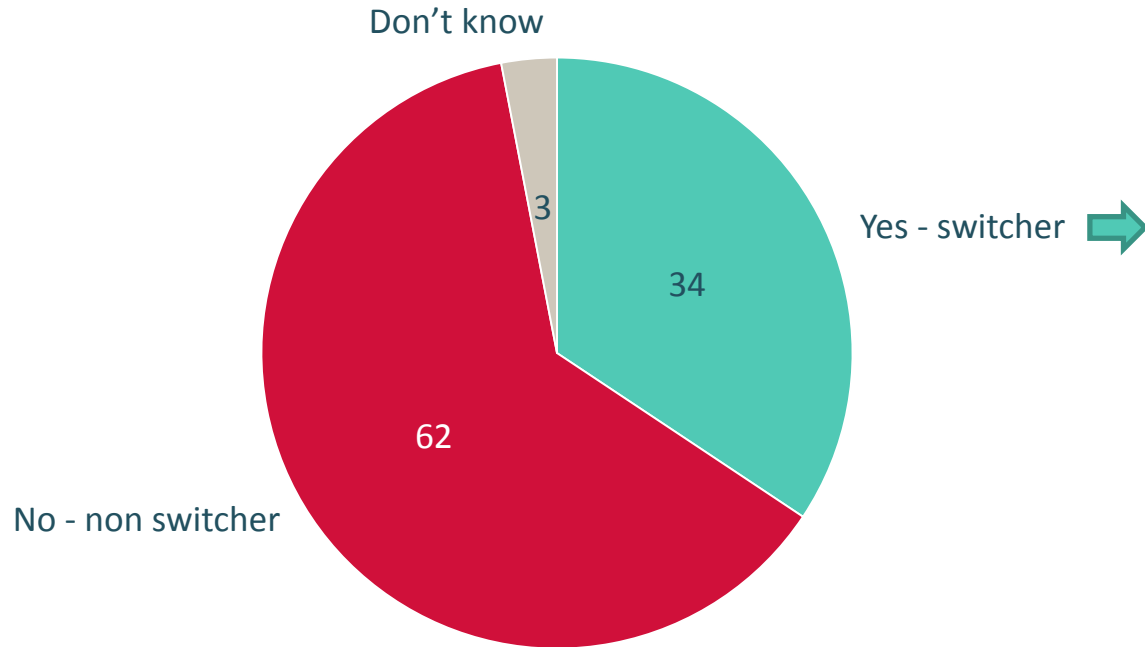
The length of time subscribed to mobile broadband service with the same service provider has increased since 2013. 41% of respondents have been with their mobile broadband service provider for more than 3 years compared with 35% in 2013.



(Q73)

Incidence of previously purchasing mobile broadband service from another supplier & reasons for switching

(Base: All Mobile Broadband Subscribers – 88)



Reasons Switched – 10*	
Better price than my previous service provider	61%
Promised speed of internet	15%
Good customer service	15%
Needed on the go access	4%
Other	21%

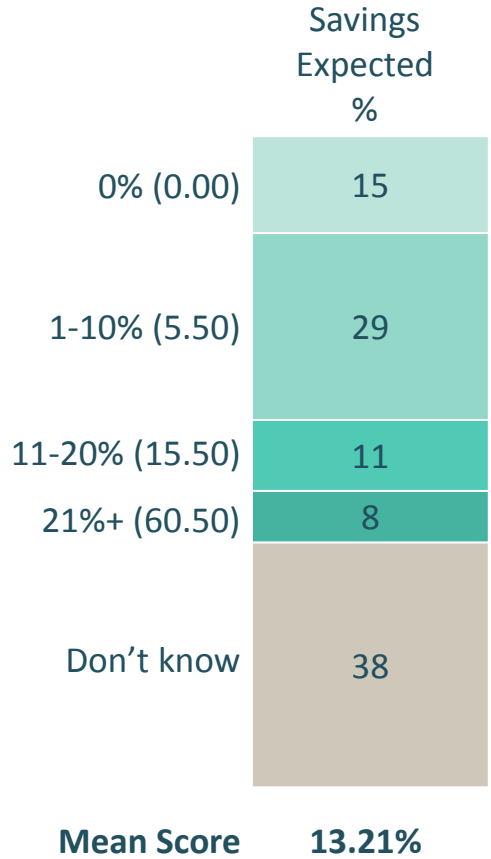
Switching questions asked in a different way 2013

*Note: Small Base Size

34% of mobile broadband subscribers have previously purchased mobile broadband from another service provider with price being the main driver for switching providers.

Perceived percentage savings on monthly bill if the best deal was obtained

(Base: All Mobile Broadband Subscribers – 88)

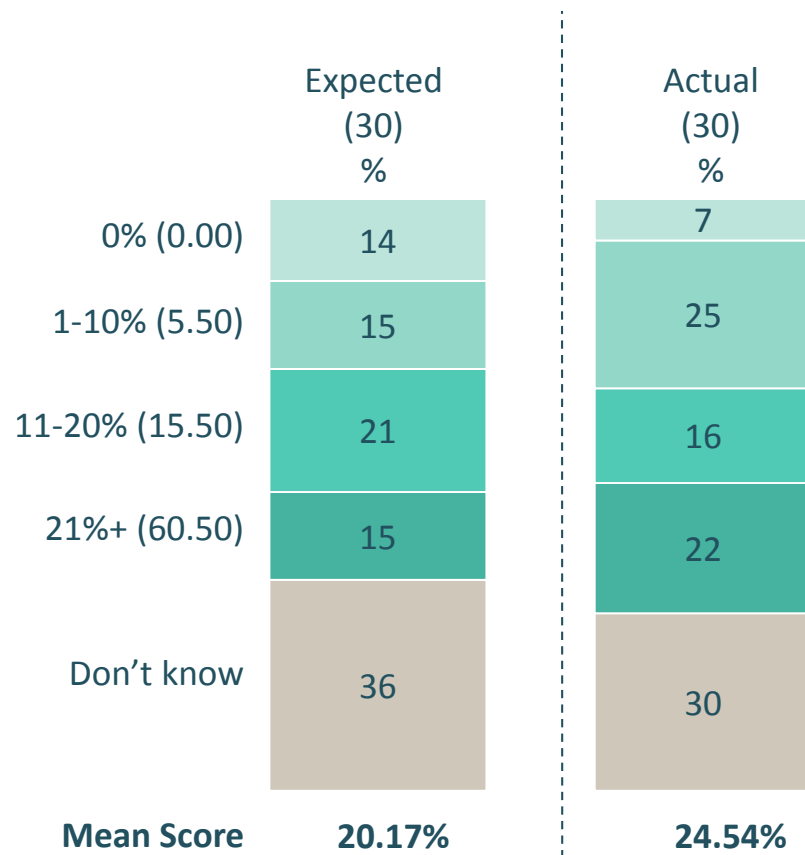


Mobile broadband subscribers expect to save about 13% if they looked for the best deals offered for mobile broadband services.



Expected v actual savings received when switching mobile broadband service provider (switchers in the past 12 months only)

(Base: All Mobile Broadband Switchers In The Past Year – 30*)



*NOTE: Small Base Size

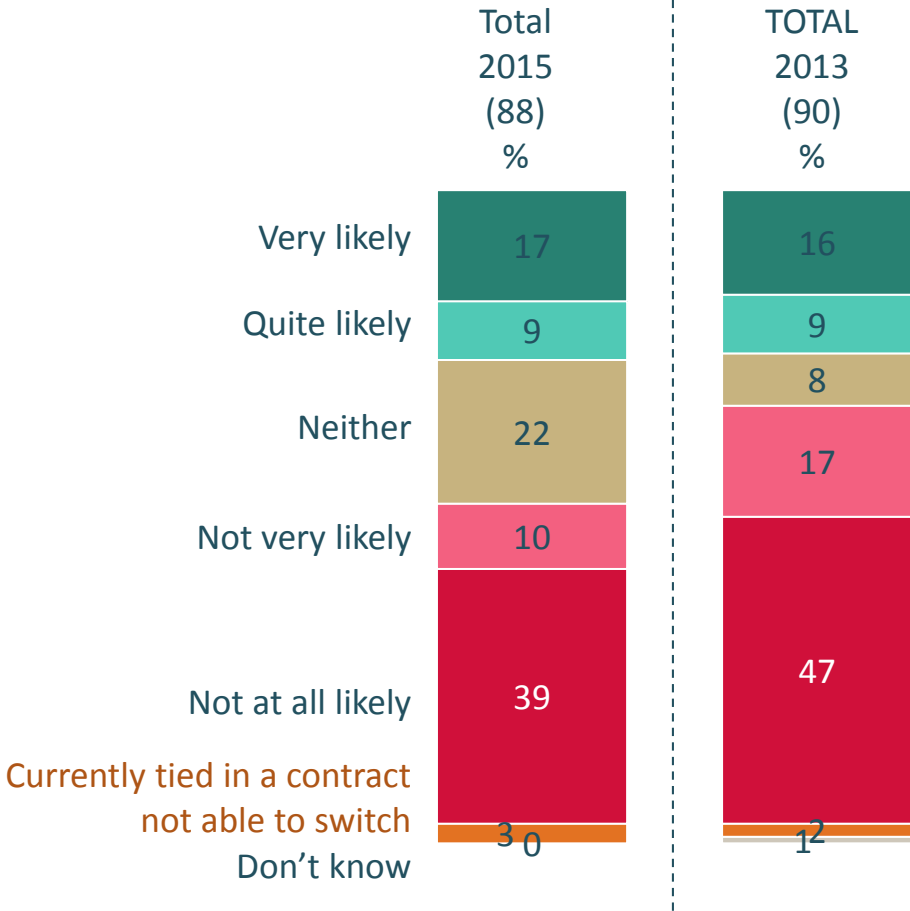
The average expected saving at the time of switching was 20% with actual savings experienced averaging at 25%

REDC

(Q76/77)
84

Likelihood to switch mobile broadband service provider within the next 12 months

(Base: All Mobile Broadband Subscribers - 88)

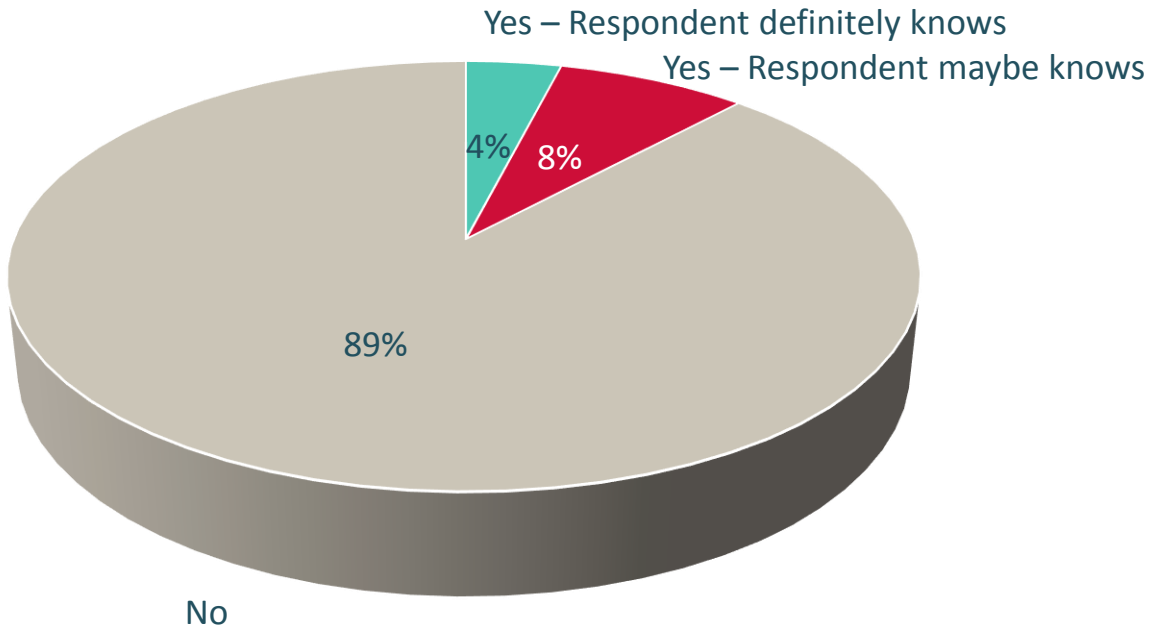


Little change in likelihood to switch since 2013 (26% in 2015 versus 25% in 2013).



Awareness of mobile broadband service download speeds

(Base: All Mobile Broadband Subscribers - 88)



89% of respondents purchasing mobile broadband service are unaware of the download speeds of their mobile broadband service.

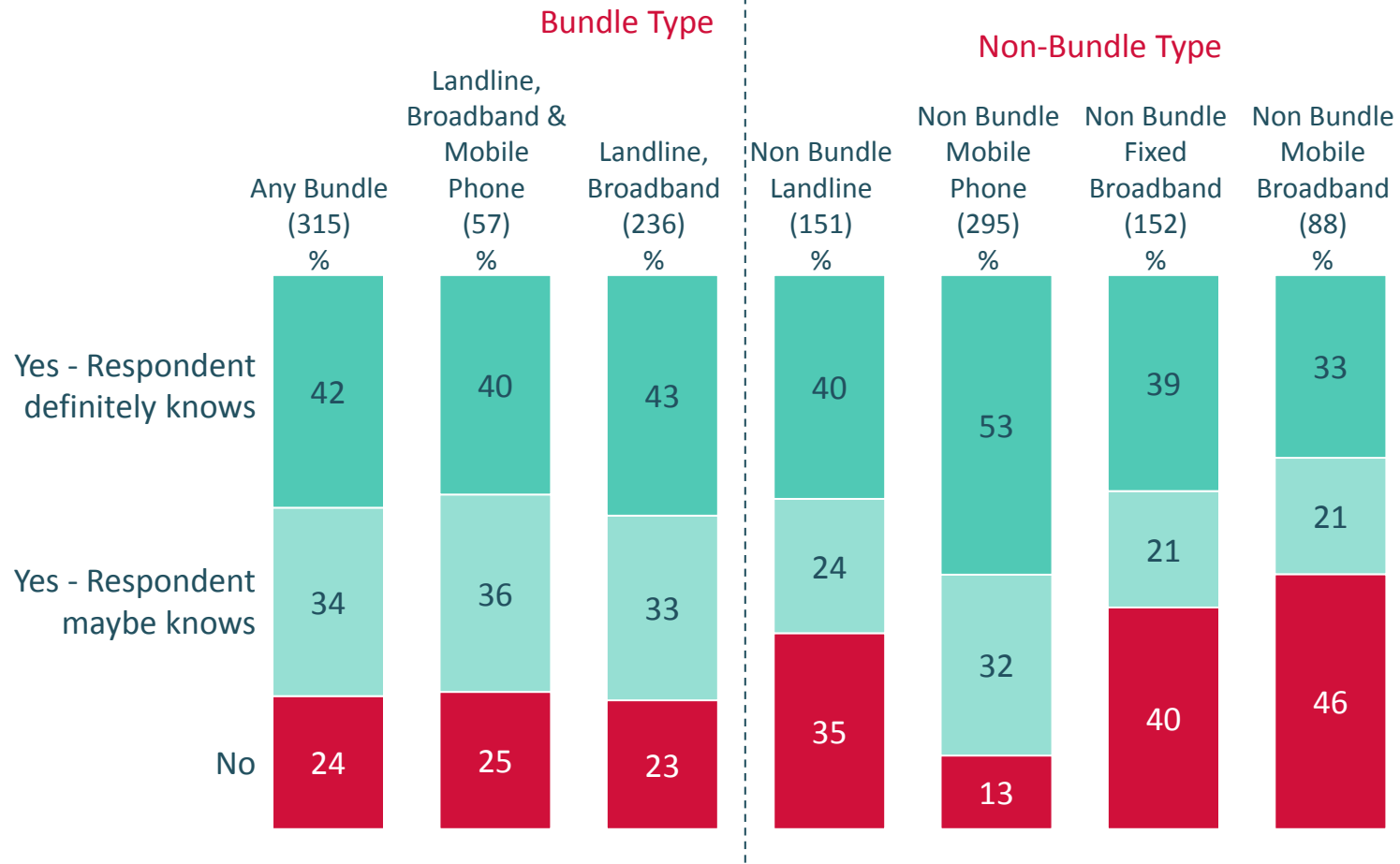


Cost Awareness & Overcharging



Purchased services cost awareness

(Base: All With Bundle and know bundle type - 315 / Without Bundle - 175)



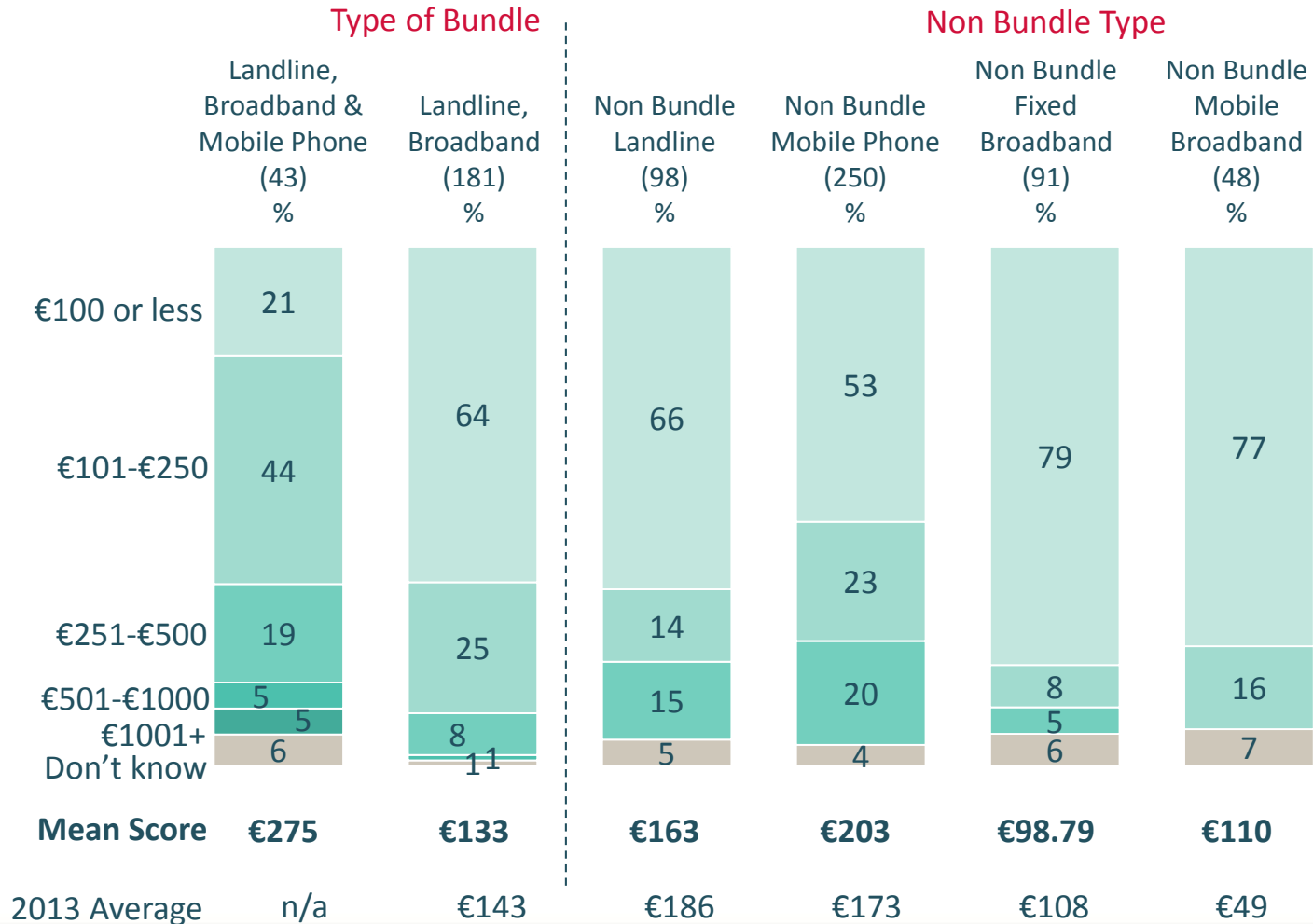
(Q14b/Q21B/Q36b/Q50b/Q71b)

Cost awareness is generally high across all types of services.



Actual cost of service

(Base: All With Bundle (who know the cost) – 239 & All Non Bundle Who Know Cost)



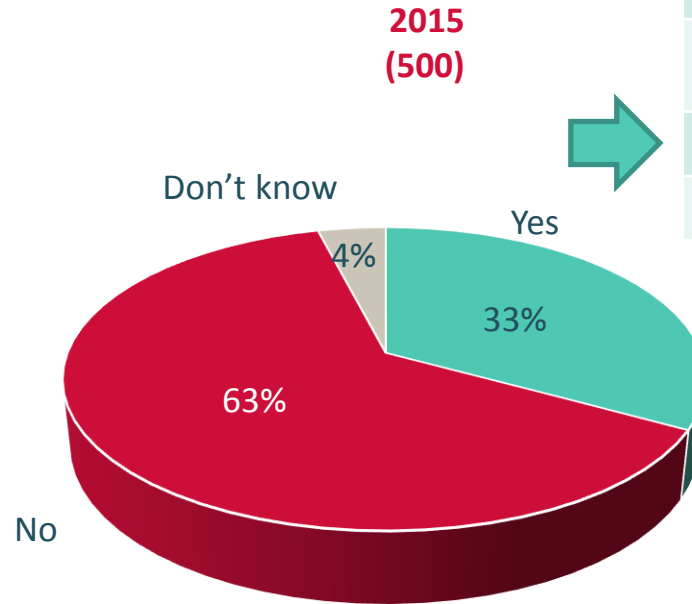
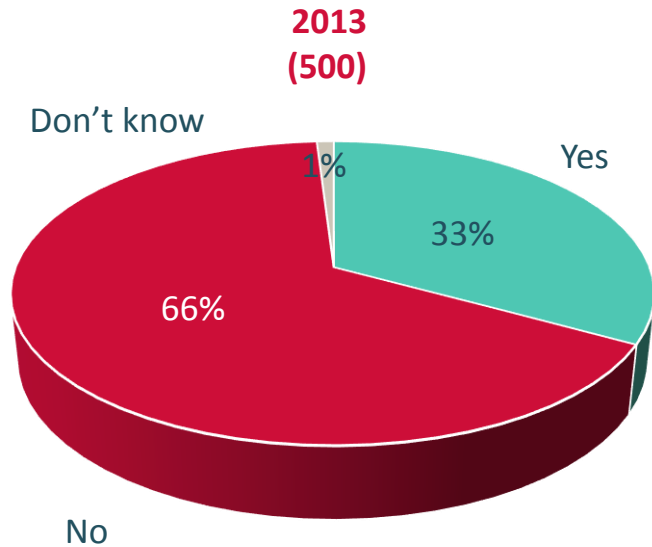
The stated monthly costs of different services and combinations of these services varies significantly.

(Q14b/Q21B/Q36b/Q50b/Q71b)

REDC

Incidence of receiving a higher than expected bill

(Base: All Decision Makers - 500)



Yes x Service Provider

Vodafone	33%
Three	35%
Eircom	34%

Similar incidence of paying more than expected for telecommunications services with 33% respondents receiving higher than expected bills.

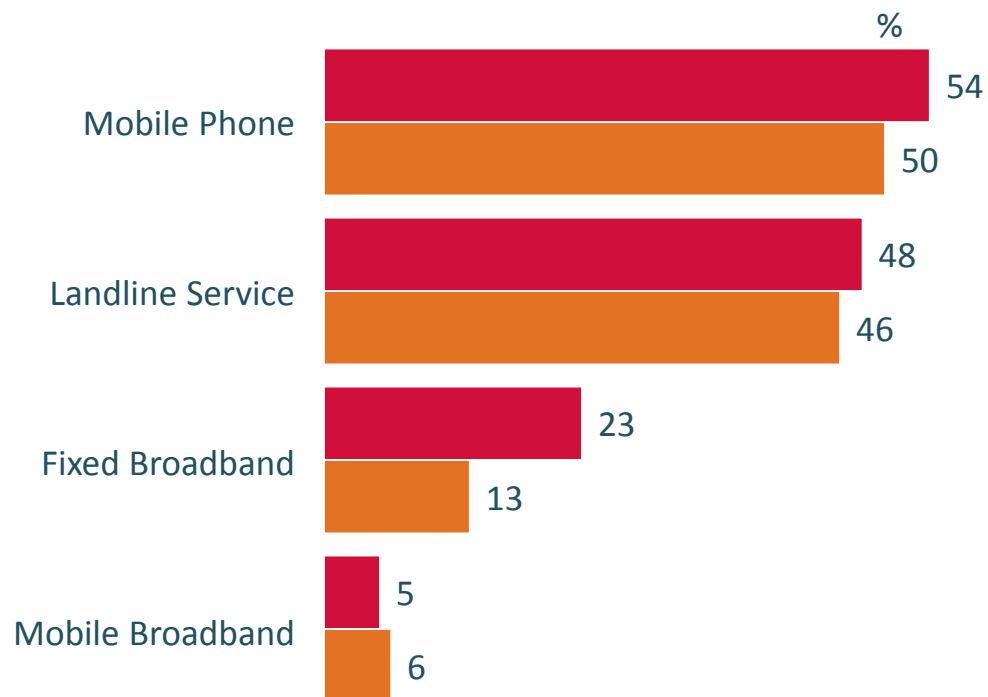


(Q83)

Which service did this bill relate to?

(Base: All Who Had A Higher Bill - 165)

TOTAL 2015 (n=165)
TOTAL 2013 (n=165)



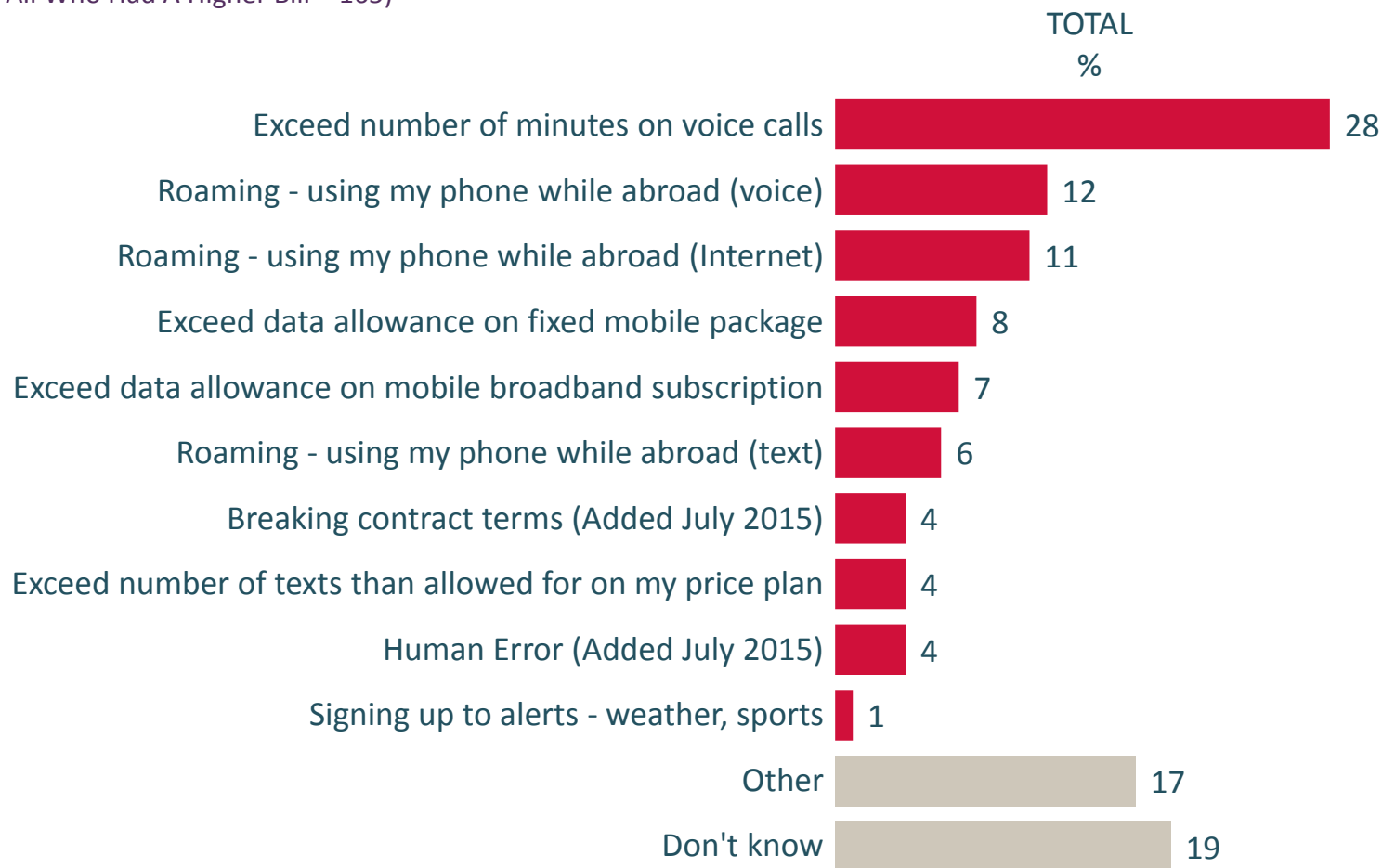
Incidence of receiving higher than expected bills is highest among landline and mobile phone service subscribers.

REDC

(Q 84)
91

Reasons for receiving higher than expected bill

(Base: All Who Had A Higher Bill – 165)



2013 reasons stated are not comparable

Most commonly cited reasons for receiving higher than expected bills are exceeding allotted voice call minutes allowance and roaming charges while using mobile phone abroad.



Appendix – Questionnaire

CLASSIFICATION SECTION

Q.1 Can I check you are responsible or jointly responsible for the selection of telecommunications supplier and/or pay the telecommunications bills for your **business**?

SERVICE AND DEVICE OWNERSHIP

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

1. Landline telephone service
2. Mobile Phone service
3. 3G/4G Mobile Broadband (through a dongle attached to computer, Mi-Fi devices, 3G/4G sim card in Tablets)
4. Fixed Internet/Broadband at home through a landline, fibre, cable TV or wireless service provider
5. None of these

Q.1b Can I just double check that your mobile broadband connection uses a mobile phone network to connect? This is not the same thing as a Wi-fi wireless network which uses a wireless router connected to your fixed broadband service and only works in your business.
Yes
No

Non Broadband Access

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

- Internet/Broadband service is not available in the area where my business is located
- Access Internet over Smartphone instead
- Installation/connection charges are too high
- The recurring monthly price of broadband service is too expensive
- Price of Computers/other personal devices that can be connected to broadband is too expensive
- Access to the Internet/Broadband is not required in my business
- Worried about security/ID theft
- Other – please specify

Social Media usage

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

1. Facebook
2. Twitter
3. Google+
4. Pinterest
5. Instagram
6. LinkedIn
7. Other
8. None of these

BRAND USAGE AND SERVICE COSTS

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

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

Q.6b What other company, if any, do you currently use as your mobile phone provider?

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

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

Bundles

Q.12 I would like you to think back to when you last purchased any one of the following services (HOME LANDLINE/MOBILE Phone/Mobile Broadband/Fixed Broadband/TV). Did you purchase more than one of these services as part of an overall price? ie Multiple service bought in a bundle from the same service provider for an overall price.

- Yes
- No
- Don't Know

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

- Landline, broadband & mobile phone
- Landline, broadband
- Broadband & mobile phone
- Landline & mobile

Q.13ai You mentioned that you have bundle types (insert options listed Q13a) which one of these bundle would you rely on most within your **business**.

Landline, broadband & mobile phone
Landline, broadband
Broadband & mobile phone
Landline & mobile

Q.13b You mentioned that you have bundle type (insert bundle type Q13a) however at Q1a you mentioned that you did not have (insert relevant option) can you confirm if you do or do not have access to this service

1. YES
2. NO

Q.14a Do you know how much your **business** pay for your << MAIN BUNDLE >> on a monthly basis?

YES – RESPONDENT DEFINITELY KNOWS
YES – RESPONDENT MAYBE KNOWS
NO

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

Landline, broadband & mobile phone
Landline, broadband
Broadband & mobile phone
Landline & mobile

Q.14c How long ago did you subscribed to (BUNDLE TYPE).

Q.14d When you subscribed to (bundle type) did you move from one service provider to another to avail of this bundle?

Yes - switcher
No – non switcher
Don't Know/Can't remember

Q.15 Why did you select (BUNDLE TYPE) within the past year?

Better Price
Saw Advertising
Word of Mouth
Only option available in my area
I was approached by my current service provider
Promised speed of broadband service
Any mention – special offer/promotion
No hidden charges
Other – please specify
Don't know/Can't remember

Q.16a What percentage saving on your current monthly bill for bundle (BUNDLE TYPE) do you think you could receive if you put in the time and effort to search for the best deal?

Q.16b What percentage saving on your current bundle, if any, did you expect to receive when you switched providers?

Q.16c What percentage saving on your current bundle, if any, did you actually save when you switched providers?

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

Very likely
Quite likely
Neither likely/unlikely
Not very likely
Not at all likely
Currently tied in a contract not able to switch
Don't Know

Q.18 Which of the following best describe what you are most likely to do if you switch service provider?

I would purchase the same bundle of services I receive, but from a different service provider.
I would purchase all the services within my bundle separately from different service providers
I would only purchase some of the services within my bundle
I would purchase more services within a bundle
Don't Know

LANDLINE TELEPHONE USER SECTION

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

To make calls
To receive calls
I keep it because I have to have it to allow me to access a broadband service as well but don't use it to make/receive calls.
I just have it for security
Is required for my alarm monitoring system to work
While I have the landline, it is not used at all
Other – specify

Q.20a How satisfied are you overall with the service provided by (PROVIDER).

Very Satisfied
Quite Satisfied
Neither Satisfied/Dissatisfied
Quite Dissatisfied
Very Dissatisfied
Don't Know

Q.20b Do you know how much your **business** pay for your landline telephone service on a monthly basis?

YES – RESPONDENT DEFINITELY KNOWS
YES – RESPONDENT MAYBE KNOWS
NO

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

AMOUNT PER MONTH --- -----



Don't Know

Q.22 What percentage saving on your monthly bill do you think you could receive if you put in the time and effort to search for the best deal?

Q.23 How long do you have your landline telephone service with (MAIN PROVIDER)?

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

- Yes - switcher
- No - non switcher
- Don't Know/Can't remember

Q.24b What prompted you to select (PROVIDER) within the past year?

- I trust this brand
- I saw an advertisement
- Better price than my previous service provider
- Was contacted by the service provider
- Recommended by a colleague
- Any mention - special offer/promotion
- No hidden charges
- Other - please specify
- Don't Know/Can't remember

Q.25a What percentage saving on your bill, if any, did you expect to receive when you switched service providers?

Q.26 What percentage saving on your bill, if any, did you actually save when you switched providers?

Q.27 When your business switched landline telephone service provider did it keep the same telephone number(s)

1. Yes - it kept the same number(s)
2. No - it got a new telephone number(s)
3. Our business did not have landline telephone service before
4. Don't Know

Q.28 Why did not your business keep your old fixed telephone number(s)?

- We wanted a new/different fixed telephone number
- We were not aware that our business could keep our fixed telephone number(s) when switching service providers
- I was told by my new service provider that I could not keep my existing fixed telephone number
- We were aware that I could keep our fixed telephone number(s) but never got around to doing it
- Other Specify

Q.29a How likely are you to consider switching Landline telephone service supplier within the next 12 Months on a scale of 1 to 5 where 1 is not at all likely and 5 is very likely?

- Very likely
- Quite likely
- Neither likely/unlikely
- Not very likely
- Not at all likely
- Currently in a contract not able to switch
- Don't Know

Q.29b How likely are you to consider purchasing a landline telephone service, with another telecommunication service(s) as part of one overall bundle or package? ie multiple service bought in a bundle from the same service provider

- Very likely
- Quite likely
- Not very likely
- Not at all likely
- Don't Know

MOBILE USER SECTION

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

1. To make/receive calls domestically
2. To make calls to and from abroad
3. To make/receive traditional text messages i.e. SMS
4. Browsing the Internet
5. Send/receive email
6. To use Social Media (e.g. Facebook, Twitter, Instagram, Pinterest)
7. Use VoIP (e.g. Skype) services
8. Other - specify

Q.36A Do you know how much your business pay for mobile phone services on a monthly basis?

- YES - RESPONDENT DEFINITELY KNOWS
- YES - RESPONDENT MAYBE KNOWS
- NO

Q.36B How much do you pay per month for this services on average?

AMOUNT: --- ----- .
DON'T KNOW

Q.37 What percentage saving on your monthly bill do you think you could receive if you put in the time and effort to search for the best deal?

Q.38 How satisfied are you with the overall service provided by your main mobile phone service supplier

Very Satisfied

Quite Satisfied
 Neither Satisfied/Dissatisfied
 Quite Dissatisfied
 Very Dissatisfied
 Don't Know

Q.39a How long does your business has your main mobile phone service with

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

Yes - switcher
 No – non switcher
 Don't Know/Can't remember

Q.40 What prompted you to select (PROVIDER) within the past year?

I trust this brand
 I saw an advertisement
 Better price than my previous service provider
 Good customer service
 Was contacted by the service provider
 Recommended by a colleague
 Any mention – special offer/promotion
 No hidden charge
 Better Price
 Network coverage/Reliability
 Offered free/subsidised phone
 Loyalty/Rewards
 Good range of SMART phones
 My friends/family were on this network
 Any mention – special offer/promotion
 Other – please specify
 Don't Know/Can't remember

Q.41 What percentage saving on your bill, if any, did you expect to receive when you switched service providers?

Q.42 What percentage saving on your bill, if any, did you actually save when you switched service providers?

Q.43 If you switched mobile telephone service provider did you keep the same mobile telephone number(s)?

Yes
 No
 Our business did not have mobile phone service before
 Don't Know

Q.44 Why did your business decide not to transfer your mobile telephone number(s)?

We wanted a new/different mobile telephone number(s)
 We were not aware that we could keep our mobile telephone number(s) when switching service providers
 Our business was told by our new service provider that we could not keep our existing mobile telephone number(s)
 We were aware that we could keep our mobile telephone number(s), but never got around to doing it
 Other Specify

Q.45 How likely are you to consider switching mobile phone service provider within the next 12 months? Please answer on a scale of 1 to 5 where 1 is not at all likely and 5 is very likely

Very likely
 Quite likely
 Neither likely/unlikely
 Not very likely
 Not at all likely
 Tied in a contract not able to switch
 Don't Know

Q.46 How likely are you to consider purchasing a mobile phone service, with another telecommunications service provider as part of one overall bundle or package? IE Multiple service bought in a bundle from the same service provider for an overall price. Please answer on a scale of 1 to 5 where 1 is not at all likely and 5 is very likely

Very likely
 Quite likely
 Neither Likely/Unlikely
 Not very likely
 Not at all likely
 Don't Know

FIXED BROADBAND SECTION

Q.49 Which of the following devices are connected to your fixed broadband service and used within your business?

Desktop computer
 Laptop computer
 Smart Phone which is able to access the internet/data on your phone (iPhone, Android, Blackberry)
 Tablet computer (iPad)
 Mobile internet device – iPod Touch/Netbook
 None of the above

Q.50a Do you know how much your business pay for your broadband service on a monthly basis?

YES – RESPONDENT DEFINITELY KNOWS
 YES – RESPONDENT MAYBE KNOWS
 NO

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

AMOUNT: --- --- --- .
 Don't Know

Q.51 What percentage saving on your monthly bill do you think you could receive if you put in the time and effort to search for the best deal?

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



Browsing the internet
 Connecting my mobile phone to my home broadband service via Wi-Fi
 Using email
 Using real time video/voice messaging (eg SKYPE, Viber, FaceTime)
 Purchasing goods/services
 Manage Banking/Pay Bills/Other Services
 Social Media, Instant Messaging (e.g Facebook, WhatsApp, Twitter, LinkedIn, Snap Chat etc.)
 Working at home/Teleworking
 Other specify

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

Q.54 What type of calls do you and other employees predominantly make using voice over broadband service such as SKYPE/FaceTime/Viber

Calls to fixed line phones
 Calls to mobile phones
 Calls to international numbers
 Calls to premium rate numbers such as competition lines, quiz shows, horoscope, etc.
 Calls to directory enquires
 Calls to 1800 numbers
 None of the above
 Don't Know

Q.55 Has the usage of voice over broadband service, such as SKYPE/FaceTime/Viber to make a phone call for business purposes impacted your and other employees' usage of traditional voice calls over business mobile phone and or landline phone?

Q.56a How satisfied are you with your fixed broadband supplier (PROVIDER).

Very Satisfied
 Quite Satisfied
 Neither Satisfied/Dissatisfied
 Quite Dissatisfied
 Very Dissatisfied
 Don't Know

Q.56b How satisfied are you with the following aspects of service you receive from this supplier (PROVIDER).

Cost
 Length of contract you signed up to
 Coverage/Reliability
 Actual speed experienced
 Billing Accuracy
 Offers and Promotions

Very Satisfied
 Quite Satisfied
 Neither Satisfied/Dissatisfied
 Quite Dissatisfied
 Very Dissatisfied
 Don't Know

Q.57a How long do you have your fixed broadband service with.

Past month
 2-3 months
 4-6 months
 Between 6 months and 12 months
 Between 1 and 2 years
 Between 2 and 3 years
 Longer than 3 years
 Don't Know

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

Yes - switcher
 No – non switcher
 Don't Know/Can't remember

Q.58 Why did you select (PROVIDER) within the past year?

I trust this brand
 I saw an advertisement
 Better price than my previous service provider
 Good customer service
 Only provider available in my area
 Promised speed of internet
 Was contacted by the service provider
 Recommended by a colleague
 Any mention – special offer/promotion
 No hidden charges
 Other – please specify
 Don't Know/Can't remember

Q.59 What percentage saving on your bill, if any, did you expect to receive when you switched providers?



- Q.60 What percentage saving on your bill, if any, did you actually save when you switched providers?
- Q.61 How likely are you to consider switching your fixed home broadband supplier within the next 12 months?
- Very likely
Quite likely
Neither likely/unlikely
Not very likely
Not at all likely
Tied in a contract not able to switch
Don't Know
- Q.62 How likely are you to consider purchasing a fixed broadband service, with another telecommunications service(s) as part of one overall bundle or package? ie Multiple service bought in a bundle from the same service provider for an overall price
- Very likely
Quite likely
Neither likely/unlikely
Not very likely
Not at all likely
Don't Know
- Q.63 Do you know the maximum claimed 'up to' download speed for your fixed broadband service?
- YES – RESPONDENT DEFINITELY KNOWS
YES – RESPONDENT MAYBE KNOWS
NO
- Q.64 What is the maximum claimed 'up to' download speed for your fixed broadband service?
- -----MBPS

- Very Satisfied
Quite Satisfied
Neither Satisfied/Dissatisfied
Quite Dissatisfied
Very Dissatisfied
Don't Know

- Q.66 Which of the following devices are connected to your mobile broadband service
- Desktop computer
Laptop computer
Smart Phone which is able to access the internet/data on your phone (iPhone, Android, Blackberry)
Tablet computer (iPad)
Mobile internet device – iPod Touch/Netbook
None of the above
- Q.67 What do you and other employees in your business use your mobile broadband service for?
- Browsing the internet
Connecting my mobile phone to my mobile broadband service via Wi-Fi
Using email
Using real time video/voice messaging (eg SKYPE, Viber, FaceTime)
Purchasing goods/services
Manage Banking/Pay Bills/Other Services
Social Media, Instant Messaging (e.g Facebook, WhatsApp, Twitter, LinkedIn, Snap Chat etc.)
Working at home/Teleworking
Other specify
- Q.68 How often do you and other employees use voice over broadband service, such as SKYPE/FaceTime/Viber to make a phone call?

- Q.69 What type of calls do you and other employees predominantly make using voice over broadband service such as SKYPE/FaceTime/Viber
- Calls to fixed line phones
Calls to mobile phones
Calls to international numbers
Calls to premium rate numbers such as competition lines, quiz shows, horoscope, etc.
Calls to directory enquires
Calls to 1800 numbers
Don't know

- Q.70 Has the usage of voice over broadband service, such as SKYPE/FaceTime/Viber to make a phone call impacted your and other employees' usage of traditional voice calls over mobile phone and/or landline phone?

- Q.71a Do you know how much your business pay for your mobile broadband service on a monthly basis?
- YES – RESPONDENT DEFINITELY KNOWS
YES – RESPONDENT MAYBE KNOWS

MOBILE BROADBAND SECTION

- Q.65a How satisfied are you with the service you receive from your mobile broadband supplier.
- Very Satisfied
Quite Satisfied
Neither Satisfied/Dissatisfied
Quite Dissatisfied
Very Dissatisfied
Don't Know
- Q.65b How satisfied are you with the following aspects of service you receive from this supplier.
- Cost
Length of contract you signed up to
Network Coverage/Reliability
Actual download speed experienced
Actual upload speed experienced
Billing Accuracy
Offers and Promotions

NO

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

Amount: ---- - - - - ,
Don't Know

Q.72 What percentage saving on your monthly bill do you think you could receive if you put in the time and effort to search for the best deal?

Q.73 How long do you have your mobile broadband service with (PROVIDER).

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

Yes - switcher
No - non switcher
Don't Know/Can't remember

Q.75 What prompted you to select (PROVIDER) within the past year?

I trust this brand
I saw an advertisement
Better price than my previous service provider
Good customer service
Only provider available in my area
Promised speed of internet
Was contacted by the service provider
Recommended by a colleague
Any mention - special offer/promotion
No hidden charges
Needed on the go access
Other - please specify
Don't Know/Can't remember

Q.76 What percentage saving on your bill, if any, did you expect to receive when you switched providers?

Q.77 What percentage saving on your bill, if any, did you actually save when you switched providers?

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

Very likely
Quite likely
Neither likely/unlikely
Not very likely
Not at all likely
Tied in a contract not able to switch
Don't Know

Q.79 Do you know the maximum claimed 'up to' download speed for your main broadband service?

YES - RESPONDENT DEFINITELY KNOWS
YES - RESPONDENT MAYBE KNOWS

NO

Q.80 What is the maximum claimed 'up to' download speed for your main broadband service?

RECORD SPEED ---- - - - - MBPS

Bill Shock

Q.83 Thinking about your (SERVICE HELD Q1A) have your business ever received a bill or paid more for a service than you expected?

Yes
No
Don't Know

Q.84 Which service did this relate to?

Landline service
Mobile Phone
Mobile Broadband
Fixed Broadband

Q.85 What did the extra charge relate to regarding the service(s) you mentioned?

Exceed number of minutes on voice calls
Exceed number of texts than allowed for on my price plan
Roaming - using my phone while abroad (voice)
Roaming - using my phone while abroad (text)
Roaming - using my phone while abroad (internet)
Exceed data allowance on mobile broadband subscription
Exceed data allowance on fixed mobile package
Signing up to alerts - weather, sports
Other - specify
Don't Know

END

**THANK
YOU**

REDC