The SME experience of communications services: research report

January 2017
Contents

1. Executive summary ........................................................................................................................................ 1
   1.1. Methodology and sample ....................................................................................................................... 1
   1.2. Catering to the needs of SMEs .............................................................................................................. 1
   1.3. Satisfaction with services used ............................................................................................................. 1
   1.4. Switching provider ............................................................................................................................... 2
   1.5. Issues and problems encountered ....................................................................................................... 2
   1.6. Contracts ............................................................................................................................................... 3
   1.7. Comparisons with 2014 research ......................................................................................................... 3

2. Introduction ...................................................................................................................................................... 4
   2.1. Background and objectives .................................................................................................................. 4
   2.2. Research methodology .......................................................................................................................... 4
   2.3. Detailed sample structure ..................................................................................................................... 4
   2.4. About the analysis and report .............................................................................................................. 6
       2.4.1. Icons used in the report .................................................................................................................... 6
       2.4.2. Report sections .................................................................................................................................. 7

3. SME sample characteristics ......................................................................................................................... 8
   3.1. Profile of research sample .................................................................................................................... 9
   3.2. Location .............................................................................................................................................. 11
   3.3. Respondent profile ............................................................................................................................. 12
   3.4. Purchase decisions in multi-site businesses ...................................................................................... 13
   3.5. Work arrangements ............................................................................................................................ 13
   3.6. Customer profile .................................................................................................................................. 15
   3.7. General attitudes to communications technology and services ...................................................... 16
   3.8. Sources of information about communication services ...................................................................... 17
   3.9. Use of Welsh among businesses based in Wales .............................................................................. 19

4. Services used .................................................................................................................................................... 21
   4.1. Annual spend ....................................................................................................................................... 21
   4.2. Communication services currently used ............................................................................................. 22
   4.3. Importance of communication services currently used ..................................................................... 28
   4.4. Future communication service improvements ................................................................................... 29
   4.5. Main providers of communication services ...................................................................................... 31
   4.6. Bundling of services ............................................................................................................................ 31

5. Satisfaction .................................................................................................................................................... 33
   5.1. Satisfaction with services used ............................................................................................................ 33
   5.2. Satisfaction with landlines (PSTN) ...................................................................................................... 36
   5.3. Satisfaction with the internet .............................................................................................................. 38
   5.4. Mobile phone service .......................................................................................................................... 42

6. Issues and problems ..................................................................................................................................... 47
   6.1. Problems experienced with service .................................................................................................... 48
       6.1.1. Landlines (PSTN) .......................................................................................................................... 48
       6.1.2. Internet ......................................................................................................................................... 50
       6.1.3. Mobiles ........................................................................................................................................... 51

7. Switching ....................................................................................................................................................... 53
The SME experience of communications services: research report

7.1. Switching behaviour..............................................................................................................................................55
  7.1.1. Switching behaviour summary ..................................................................................................................55
  7.1.2. Landlines (PSTN): switching classification ...........................................................................................56
  7.1.3. Landlines (PSTN): attitudes towards switching service provider ..........................................................59
  7.1.4. Landlines (PSTN): prompts and barriers to switching service provider ..................................................62
  7.1.5. Landlines (PSTN): the switching process ................................................................................................64

7.2. Switching behaviour in relation to internet service providers .............................................................................65
  7.2.1. Internet: switching classification ................................................................................................................65
  7.2.2. Internet: attitudes towards switching service providers............................................................................67
  7.2.3. Internet: satisfaction with service .............................................................................................................70
  7.2.4. Internet: prompts and barriers to switching service provider ..................................................................71
  7.2.5. Internet: the switching process ................................................................................................................73

7.3. Switching behaviour in relation to mobile service providers ...............................................................................74
  7.3.1. Mobiles: switching classification ............................................................................................................74
  7.3.2. Mobiles: attitudes towards switching service providers ...........................................................................76
  7.3.3. Mobiles: prompts and barriers to switching service provider ..................................................................79
  7.3.4. Mobiles: the switching process ..............................................................................................................81

8. Contracts ..................................................................................................................................................................82
  8.1. Landlines ..........................................................................................................................................................83
    8.1.1. Landlines (PSTN): basic contracts ...........................................................................................................83
    8.1.2. Landlines (PSTN): business-specific contracts .......................................................................................85
    8.1.3. Landlines (PSTN): contract terms and conditions ...................................................................................86
  8.2. Internet ................................................................................................................................................................88
    8.2.1. Internet: basic contracts ...........................................................................................................................88
    8.2.2. Internet: business-specific contracts .......................................................................................................90
    8.2.3. Internet: contract terms and conditions ...................................................................................................91
  8.3. Mobiles ..............................................................................................................................................................93
    8.3.1. Mobiles: basic contracts ..........................................................................................................................93
    8.3.2. Mobiles: business-specific contracts .......................................................................................................95
    8.3.3. Mobiles: contract terms and conditions ................................................................................................96

9. Internet use .............................................................................................................................................................98
  9.1. Internet application use .......................................................................................................................................99
  9.2. Smartphone use for business purposes ..........................................................................................................100
  9.3. Online marketing ..............................................................................................................................................101
  9.4. Incidence of replacing leased lines with fibre broadband .................................................................................103

10. Focus on confidence ..............................................................................................................................................104
  10.1. General attitudes to communication technology and services ....................................................................105
  10.2. Satisfaction with services ..............................................................................................................................106
  10.3. Switching classification ................................................................................................................................107
  10.4. Attitudes to switching ....................................................................................................................................108

11. Lack of availability of services ...........................................................................................................................109
  11.1. General attitudes to communications technology/services ...........................................................................110
  11.2. Satisfaction with services ................................................................................................................................110
  11.3. Switching classification ...................................................................................................................................112
  11.4. Attitudes to switching ....................................................................................................................................113
12. Focus on remote and 'on-the-move' SMEs ................................................................. 114
   12.1. General attitudes to communications technology/services ........................................ 115
   12.3. Satisfaction with services ......................................................................................... 116
   12.4. Switching classification .......................................................................................... 117
   12.5. Attitudes to switching .............................................................................................. 118

13. Focus on contract type ............................................................................................... 119
   13.1. General attitudes to communications technology/services ........................................ 120
   13.3. Satisfaction with services ......................................................................................... 121
   13.4. Switching classification .......................................................................................... 122
   13.5. Attitudes to switching .............................................................................................. 123

14. Focus on IT specialists ............................................................................................... 124
   14.1. General attitudes to communications technology/services ........................................ 125
   14.3. Switching classification .......................................................................................... 126

Appendices ..................................................................................................................... 127
   A. Questionnaire ............................................................................................................ 127
1. Executive summary

1.1. Methodology and sample

A survey of 1501 SMEs (0-249 employees) was undertaken using CATI (computer aided telephone interviewing). The sample was sourced from Dun & Bradstreet. Minimum quotas were set on size of SME (number of employees), nation, English region, industry sector and urbanity.

Interviews lasted 45 minutes on average. The survey data were weighted to be representative of the SME universe on size. Interviews were undertaken with the person in each SME who had primary responsibility (sole or joint) for telecoms.

Fieldwork took place between 9 May and 18 July 2016.

1.2. Catering to the needs of SMEs

Small and medium-sized enterprises (SMEs) claim to spend, on average, £1.4k per year on communications services, with spend increasing as they grew in size; from an average of £1,105 in zero to four-employee businesses to an average of £11,323 in 50 to 249-employee businesses. These services were seen to be fundamental to more than four-fifths of the businesses surveyed.

The vast majority of SMEs (82%) felt that their business needs were well catered for by the communications market.

The internet could be problematic for some SMEs. Those with an internet connection were very reliant on it. While the proportions are reducing, the majority still had ADSL, and satisfaction with this service was lower than for all other forms of fixed broadband. Speed and reliability remained the two key issues.

SMEs which considered that their growth had been hampered by a lack of service expressed higher than average levels of dissatisfaction with their internet service.

SMEs which felt that there were services not available to them, which their business could benefit from, were most likely to cite a need for faster/ fibre broadband. Larger SMEs, and those in remote rural locations, seemed more affected than other SMEs.

SME employees who regularly worked in sparsely populated areas and/or while travelling in the UK, and who were therefore more reliant on mobile phones, continued to be more frustrated with the coverage and reliability of those services.

1.3. Satisfaction with services used

Overall satisfaction was generally good across all three services. The highest levels of dissatisfaction were with fixed-line broadband services, especially ADSL, where a quarter (26%) of users were dissatisfied.

The areas of highest satisfaction were:

- PSTN landline: geographic coverage (89% satisfied), reliability (88%) and value for money (72%)
- Internet: being able to send and receive emails/access the internet (81% satisfied), geographic coverage (74%), and reliability (73%)
- Mobile phone: being able to send and receive emails/ access the internet (smartphone users 80% satisfied), value for money (78%), reliability of signal (75%) and geographic coverage (73%).
The following were the key areas in which higher proportions of SMEs were dissatisfied with each service:

- PSTN landline: clear and understandable terms (15% dissatisfied), quality of customer service staff (14%), value for money (14%);
- Internet - connection speed (29%), access speed paid for (28% dissatisfied), availability of symmetrical services (24%);
- Mobile phone: geographic coverage (18% dissatisfied), signal reliability (16%).

Ease of contacting the customer service department was a source of frustration across all three services, but notably for the internet (internet: 25% dissatisfied, PSTN landline: 19% dissatisfied, mobile: 10% dissatisfied).

### 1.4. Switching provider

Within each market, around half of all SMEs had ever switched to another provider for one or more of their communications services, and one in six had switched in the last two years.

Looking at all three markets together, more than a quarter of SMEs had switched at least one of their landline internet or mobile services in the last two years.

Experiencing problems with the existing provider seemed to be the main prompt for an SME to consider switching, along with a perception that cheaper deals might be available elsewhere, and poor customer service.

SMEs felt that they had plenty of choice of suppliers, products and services. However, they thought that it could be hard to compare across suppliers (especially in relation to network quality, customer service, tariffs and price) in order to reach a decision on which provider/package to switch to.

The main reason for switching was to get a better deal. Better coverage was also important for those switching mobile phone provider.

SMEs are often dissuaded from switching if they cannot source a cheaper deal or if they are persuaded by their existing provider to stay.

The majority of switching SMEs found the process to be largely straightforward, although a fairly high proportion experienced some problems - most commonly, their existing provider trying to 'save' them, receiving bills for the cancelled service, the process taking longer than expected, and/or temporary interruption to their service.

### 1.5. Issues and problems encountered

A quarter of all SMEs had experienced issues with their landline service, a third had had issues with their mobile and half with their internet.

Problems were largely around service delivery areas that are key to satisfaction:

- **Landline:** Reliability (loss of service)
- **Internet:** Reliability (loss of service), slow download and upload speeds
- **Mobile:** Mobile coverage, call dropping, mobile internet coverage

Those experiencing issues with landlines (poor service reliability or poor voice quality), internet (poor service reliability or slow upload/download speeds) or mobile (poor coverage, voice quality or other service reliability elements) were asked if these issues had led to complete loss of service, intermittent loss of service or just poor service generally. Problems with landlines were more likely to result in a complete loss of service:

- **Landline:** 59% complete loss
- **Internet:** 34% complete loss
- **Mobile:** 26% complete loss

Those experiencing the problems described above were also asked to rate the level of impact on their business on a scale of 1-10. These ratings were summarised as ‘high’ (8-10), ‘medium’ (4-7) or ‘low’ (1-3) impact.
Landline problems had the largest impact on the running of the business:

- Landline: 42% high impact
- Internet: 39% high impact
- Mobile: 35% high impact

1.6. Contracts

The majority of SMEs had a contract for each of the communications services they used, and most of these were business-specific contracts, although these types of contract were less prevalent for mobile phones.

Among those which did not have a business contract, there was a belief that these do not offer any advantages over a personal contract, and/or that they are more expensive.

Most SMEs were aware of the key terms and conditions of their contract and the majority felt that they were presented in a ‘plain and intelligible’ way. However, when asked, almost all felt that it would be helpful to have the key terms presented ‘bold and upfront’.

More than one in ten had experienced problems as a result of something not specified within their terms and conditions.

More could be done to make SMEs aware of early termination charges (ETCs); only half were aware of whether their contract included these or not (most of the rest were unsure).

Four-fifths of SMEs with business contracts were satisfied that their provider fulfilled the agreed level of service in relation to their business contract.

1.7. Comparisons with 2014 research

Comparisons to the 2014 study have been made wherever possible, although some comparisons should be treated as indicative because of questionnaire changes between 2014 and 2016.

Key differences between the surveys included:

- Changes to the wording of some scales (e.g. from ‘strongly agree’ and ‘agree’ to ‘strongly agree’ and ‘slightly agree’), and the wording of statements.
- Changes to the routing of questions, and allocation of respondents to questions and/or sections. In 2016, all respondents answered about landline, internet and mobile, if they used them. They were also pre-allocated extra questions about one each of landline, internet and mobile.
- Changes to the definition of ‘internet services’. In 2014, we referred to ‘fixed internet’ (ADSL, fibre, cable and dial-up). In 2016 we broadened this so that questions were asked about ‘internet services’, which included those using dedicated internet access (e.g. via Ethernet), mobile broadband (via a cellular network) and fixed wireless broadband.
- Most questions about ‘fixed landline’ in 2016 asked respondents to refer only to their PSTN landline service. In 2014, ‘fixed landline’ questions were asked about all types of fixed landline services. Ninety-five per cent of respondents had PSTN landline services in 2014, compared with 91% in 2016.

Where comparisons can be drawn with the research conducted in 2014, the overall use and importance of fixed landline, internet and mobile have remained largely the same. Within internet, use of fibre/superfast has increased at the expense of ADSL. Within mobile, use of smartphones has increased at the expense of standard mobiles.

Bundling of services has increased slightly since 2014; landline with fixed internet remains the most common bundled service (46% of the total market use this bundle).
Satisfaction levels with all three services have declined since 2014, especially for those using ADSL, suggesting that SMEs are becoming more demanding.

The proportion of SMEs switching provider over the past 12 months was slightly lower, across all three services, in 2016.

The attitudinal profile of SMEs remains similar to 2014 in respect to:
- The needs of business being well catered for (marginally lower);
- communications services being fundamental to the business;
- feeling well informed about communications services; and
- feeling confident that they know what products and services would benefit their business (marginally lower).

2. Introduction

2.1. Background and objectives

The primary objective of the research was to measure use, experience of and attitudes towards communications services and service providers among SMEs across the UK.

Within this, Ofcom wanted to cover the following topics:
- The communications services and devices currently used, and the cost of communications services.
- The sources of information used for communications services.
- Satisfaction with communications services received and providers used.
- Reasons for non-adoption of services and devices not currently used.
- Engagement with the market (e.g. understanding of and access to communications channels, awareness of supplier choice, incidence of supplier switching (actual and planned), barriers to switching, etc.
- The nature and extent of any problems with services received.
- Awareness and usage of Ofcom’s Help Portal.

Ofcom wanted to be able to analyse this by nation, company size and sector.

2.2. Research methodology

1501 x 45-minute CATI (computer assisted telephone interviewing) interviews were conducted with SMEs (businesses with 0-249 employees).

Quotas were set on employee size, nation, English region, industry sector and urbanity, to ensure that sub-group analysis could be undertaken on those variables.

The sample was provided by Dun & Bradstreet.

Survey data were weighted on company size in order to be representative of the SME universe.

The interviews were undertaken with the person in each SME who had primary responsibility (sole or joint) for telecoms, IT and other communications services.

2.3. Detailed sample structure

Figures 1 to 4 show a more detailed breakdown of the research sample in terms of business size, industry sector and nation/region. The EU definition is used to describe SMEs throughout the report; micro = 0-9 employees, small = 10-49 employees, medium = 50-249 employees.
### Figure 1: SME size

<table>
<thead>
<tr>
<th>Category</th>
<th>Approximate proportion of ALL businesses</th>
<th>Interviews achieved</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single self-employed/SOHO</td>
<td>Usually included as part of the 90.4% below</td>
<td>250</td>
</tr>
<tr>
<td>Micro 1 (2-4 employees)</td>
<td>90.4%</td>
<td>341</td>
</tr>
<tr>
<td>Micro 2 (5-9 employees)</td>
<td>4.9%</td>
<td>304</td>
</tr>
<tr>
<td>Small (10-49 employees)</td>
<td>4.0%</td>
<td>355</td>
</tr>
<tr>
<td>Medium (50-249 employees)</td>
<td>0.7%</td>
<td>251</td>
</tr>
</tbody>
</table>

Source: Sample

### Figure 2: Industry sector

<table>
<thead>
<tr>
<th>Category</th>
<th>Interviews achieved</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary (agriculture, manufacturing, construction)</td>
<td>333</td>
</tr>
<tr>
<td>Retail/wholesale</td>
<td>408</td>
</tr>
<tr>
<td>Services</td>
<td>461</td>
</tr>
<tr>
<td>Government (including central, local, education and health)</td>
<td>124</td>
</tr>
<tr>
<td>Third sector organisations (charities etc.)</td>
<td>175</td>
</tr>
</tbody>
</table>

Source: Sample

### Figure 3: Nation/ English region

<table>
<thead>
<tr>
<th>Region</th>
<th>Interviews achieved</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scotland</td>
<td>322</td>
</tr>
<tr>
<td>Northern Ireland</td>
<td>302</td>
</tr>
<tr>
<td>Wales</td>
<td>327</td>
</tr>
<tr>
<td>North East</td>
<td>58</td>
</tr>
<tr>
<td>North West</td>
<td>67</td>
</tr>
<tr>
<td>Yorkshire/Humber</td>
<td>55</td>
</tr>
<tr>
<td>East Midlands</td>
<td>53</td>
</tr>
<tr>
<td>West Midlands</td>
<td>56</td>
</tr>
<tr>
<td>East of England</td>
<td>71</td>
</tr>
<tr>
<td>London</td>
<td>55</td>
</tr>
<tr>
<td>South East</td>
<td>59</td>
</tr>
<tr>
<td>South West</td>
<td>76</td>
</tr>
</tbody>
</table>

Source: Sample
Figure 4: Urbanity

An urban/rural flag was appended to the sample by UK Geographics. The seven definitions of urbanity and rurality are shown below, along with the number of interviews achieved for each of three broader definitions.

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
<th>Urbanity</th>
<th>Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Large City</td>
<td>Very Urban</td>
<td>500,000+</td>
</tr>
<tr>
<td>B</td>
<td>Smaller city or large town</td>
<td>Urban</td>
<td>100,000 - 500,000</td>
</tr>
<tr>
<td>C</td>
<td>Medium town</td>
<td>Urban</td>
<td>15,000 - 100,000</td>
</tr>
<tr>
<td>D</td>
<td>Small town (within 10 miles of A, B or C)</td>
<td>Urban</td>
<td>2,000 - 15,000</td>
</tr>
<tr>
<td>E</td>
<td>Small town (more than 10 miles from A, B or C)</td>
<td>Urban</td>
<td>2,000 - 15,000</td>
</tr>
<tr>
<td>F</td>
<td>Rural area (within 10 miles of A, B or C)</td>
<td>Rural</td>
<td>0 - 2,000 Town fringe, Villages, Hamlets Open countryside</td>
</tr>
<tr>
<td>G</td>
<td>Rural area (more than 10 miles from A, B or C)</td>
<td>Very rural</td>
<td>0 - 2,000 Villages, Hamlets Open countryside</td>
</tr>
</tbody>
</table>

Source: Sample

2.4. About the analysis and report

Sub-group analysis has been conducted for this report, with a particular focus on company size and urbanity. Where such differences are reported, they are statistically significant to a 95% confidence level and have been tabulated in the report or highlighted in the text.

This report focuses on the main findings of interest from this research. However, all data are available in the Research section of Ofcom’s website.

2.4.1. Icons used in the report

A number of icons are used in the report to illustrate different communication technologies, business size and urbanity. These are detailed in Figure 5.
2.4.2. Report sections

Section 3 (page 8) looks at the sample characteristics of SMEs in terms of sector, size and location, and profiles respondents with regard to purchase decision-making and attitudes towards communication services.

Section 4 (page 21) covers the services used by SMEs, looking at annual spend, types of service used, the importance of services to the business, future services and main providers. It takes a detailed look at use of landlines, mobiles and internet.

Section 5 (page 33) examines satisfaction with services used, both overall and individually for landlines, internet and mobiles.

Section 6 (page 47) is about problems or issues experienced with services.

Section 7 (page 53) covers switching behaviour (both past and future attitudes) with regard to switching service providers of landlines, mobiles and internet. It examines attitudes towards switching, and explores prompts and barriers to switching. The switching process was also examined among respondents who had been through the switching process.

Section 8 (page 82) deals with contracts. It explores the basic details of these; business-specific contracts, terms and conditions, and service level agreements. It takes a detailed look at these for landlines, mobiles and the internet.

Section 9 (page 89) looks at internet use, covering applications used, online marketing, and the likelihood of replacing leased lines with fibre broadband.

Section 10 (page 104) compares the responses of those SMEs who feel confident that they are able to identify which new communications products or services would be valuable for their organisation with those who do not feel confident in this area.
Section 11 (page 109) compares the responses of those SMEs who feel that the growth of their business has been hampered by a lack of communications services with those who do not feel this.

Section 12 (page 114) looks in detail at SMEs who work in sparsely-populated areas of the countryside and/or work while travelling in the UK.

Section 13 (page 119) looks in detail at SMEs who have either a business or a personal contract for each of their landline, mobile and internet services.

Section 14 (page 124) looks in detail at respondents who describe themselves as IT specialists (versus our total sample of SMEs).

A copy of the research questionnaire is appended.

3. SME sample characteristics

Summary

In the majority (77%) of SMEs, the responsibility for communications buying decisions rested with the owner/proprietor, MD, partner or other Director. One per cent of SMEs had an IT/telecoms specialist who had this responsibility (this increased to 31% in medium-sized SMEs). The majority (81%) of these decision-makers described communications as fundamental to their business.

The majority (91%) of SMEs were operating from a single site, and most (90%) had fewer than five employees. Most were largely office based; 54% described their employees as being mainly/ entirely office based and less than a quarter (23%) described employees as working mainly/ entirely away from the office.

Around three-fifths (60%) of SMEs were based in urban locations. Around half of those in more rural locations were in remote rural locations (21%).

Seven per cent of businesses were operating from multiple sites within the UK, with most (96%-98%) controlling their own communications budget.

The majority (71%) of SMEs were serving customers located mainly in their local area or region; 10% were doing business outside the UK. SMEs were serving both businesses and consumers, with slightly more weight towards serving consumers.

Most SMEs felt that the needs of their business were well served by the communications market (82%) and that information was widely available about communications products and services (76%). However, one in seven (14%) felt that the growth of their business had been impacted by a lack of suitable products or services.

Most SMEs (66%) felt well informed about how communications services could help their business survive and grow.

Google/ search engine (67%) and word of mouth from friends/colleagues (66%) were the key sources of information about communications services, followed by provider websites (55%) and mainstream media/press (48%).

A quarter (28%) claimed to be aware of Ofcom’s Advice for Businesses web service.
3.1. Profile of research sample

Figures 6 to 10 examine the profile of SMEs in our sample in terms of industry group, sector, turnover, sites and employees.

SMEs in Scotland were more likely to be working in the services sector (42% vs. 33% overall) while fewer were in retail/wholesale (22% vs. 30%). SMEs in Wales were less likely to be in the third sector (3% vs. 9%)

Reflecting their SME status, the majority of companies operated out of one site (Figure 9). Almost half had a turnover of £100k or less, and only 1% had a turnover of more than £5m (Figure 8).

Source: S4a. SIC code data from sample
Base: total sample (n=1501)
Figure 8: Annual turnover/ budget

<table>
<thead>
<tr>
<th>Turnover/Budget</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt; £50k</td>
<td>27%</td>
</tr>
<tr>
<td>£50k-£75k</td>
<td>10%</td>
</tr>
<tr>
<td>Over £75k-£100k</td>
<td>10%</td>
</tr>
<tr>
<td>Over £100k-£250k</td>
<td>14%</td>
</tr>
<tr>
<td>Over £250k-£500k</td>
<td>7%</td>
</tr>
<tr>
<td>Over £500k-£1m</td>
<td>3%</td>
</tr>
<tr>
<td>Over £1m-£5m</td>
<td>4%</td>
</tr>
<tr>
<td>Over £5m</td>
<td>1%</td>
</tr>
<tr>
<td>Don’t know/ref</td>
<td>26%</td>
</tr>
</tbody>
</table>

Source: P2/P3. Approximately what was your annual turnover/budget for the last financial year (2015/16)? Base: total sample (n=1501)

Figure 9: Number of UK sites/offices

- 1 site/office: 91%
- 2 sites/offices: 5%
- 3 sites/offices: 1%
- 4+ sites/offices: 1%

Source: S6. How many sites or offices does your organisation operate from in the UK, including this one? Base: total sample (n=1501)

Figure 10 shows that more than one in three SMEs were sole traders and more than half had 2-4 employees. Sole traders were least prevalent in Northern Ireland (28% vs. 38% overall).

Figure 10: Number of employees (including the respondent)

<table>
<thead>
<tr>
<th>Number of Employees</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>38%</td>
</tr>
<tr>
<td>2</td>
<td>24%</td>
</tr>
<tr>
<td>3-4</td>
<td>28%</td>
</tr>
<tr>
<td>5-9</td>
<td>5%</td>
</tr>
<tr>
<td>10-19</td>
<td>2%</td>
</tr>
<tr>
<td>20-49</td>
<td>2%</td>
</tr>
<tr>
<td>50-99</td>
<td>0%</td>
</tr>
<tr>
<td>100-249</td>
<td>0%</td>
</tr>
</tbody>
</table>

Source: S5a. Including yourself, how many people does your organisation currently employ in the UK, either full or part time? Base: total sample (n=1501)
3.2. Location

Figure 11 shows that more than a third (36%) of our sample were based in England, with around a fifth in each of Scotland, Wales and Northern Ireland.

Three-fifths of SMEs were based in an urban location (Figure 12); around half of those in more rural locations were in remote rural locations.

Those in England were significantly more likely than those in Scotland, Wales or Northern Ireland to be sited in urban locations (70%).

Figure 11: Region

<table>
<thead>
<tr>
<th>Region</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>England</td>
<td>36%</td>
</tr>
<tr>
<td>South West</td>
<td>5%</td>
</tr>
<tr>
<td>South East</td>
<td>5%</td>
</tr>
<tr>
<td>West Midlands</td>
<td>4%</td>
</tr>
<tr>
<td>East of England</td>
<td>4%</td>
</tr>
<tr>
<td>North East</td>
<td>4%</td>
</tr>
<tr>
<td>East Midlands</td>
<td>4%</td>
</tr>
<tr>
<td>London</td>
<td>4%</td>
</tr>
<tr>
<td>North West</td>
<td>3%</td>
</tr>
<tr>
<td>Yorkshire and the Humber</td>
<td>3%</td>
</tr>
<tr>
<td>Scotland</td>
<td>24%</td>
</tr>
<tr>
<td>Wales</td>
<td>21%</td>
</tr>
<tr>
<td>Northern Ireland</td>
<td>19%</td>
</tr>
</tbody>
</table>

Source: S9 Region data from sample
Base: total sample (n=1501)

Figure 12: Urbanity

<table>
<thead>
<tr>
<th>Urbanity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Urban</td>
<td>60%</td>
</tr>
<tr>
<td>Large city</td>
<td>5%</td>
</tr>
<tr>
<td>Smaller city/large town</td>
<td>13%</td>
</tr>
<tr>
<td>Medium town</td>
<td>20%</td>
</tr>
<tr>
<td>Small town</td>
<td>21%</td>
</tr>
<tr>
<td>Rural</td>
<td>40%</td>
</tr>
<tr>
<td>Rural, nr urban</td>
<td>19%</td>
</tr>
<tr>
<td>Remote rural</td>
<td>21%</td>
</tr>
</tbody>
</table>

Source: Urbanity data from sample
Base: total sample (n=1501)

Two per cent of organisations were based on an industrial estate/ business park. Of these, 53% had been based there for more than ten years, 32% for 6-10 years, 11% for 1-5 years and 4% for less than a year. The vast majority (97%) were able to choose their own providers of communications services. Two per cent had no choice over their internet supplier.

Only 1% of the SMEs in our sample had been prevented from moving to a preferred location due to lack of communications services. Among these (and noting the very small sample size), the services not available were:

- ADSL broadband    More than half of those affected
- Mobile signal     One in three of those affected
• PSTN telephone lines One in three of those affected
• Cable/fibre broadband 16% of those affected
• ISDN 2/2e 5% of those affected

3.3. Respondent profile

Figures 13 and 14 show that in the majority of SMEs, the owner/proprietor or similar had responsibility for purchasing decisions about communications services. Those representing small or medium SMEs (those with 10+ employees) were more likely to have joint responsibility (72% compared with 34% overall). IT/telecoms specialists were rare among SMEs as a whole (they much more prevalent in medium SMEs).

Figure 13: Job title

<table>
<thead>
<tr>
<th>Job Title</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Owner / Proprietor</td>
<td>53%</td>
</tr>
<tr>
<td>Managing Director</td>
<td>13%</td>
</tr>
<tr>
<td>Partner / Managing Partner</td>
<td>11%</td>
</tr>
<tr>
<td>PA / Office manager</td>
<td>6%</td>
</tr>
<tr>
<td>Other senior manager</td>
<td>4%</td>
</tr>
<tr>
<td>IT/Telecoms director</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>12%</td>
</tr>
</tbody>
</table>

Source: S3. Could I please confirm your exact job title?
Base: total sample (n=1501)

Figure 14: Responsibility for communications purchasing decisions

Source: S2b. And which of the following best describes the responsibility you personally have for making purchasing decisions in relation to these communications services for the organisation?
Base: total sample (n=1501)
3.4. Purchase decisions in multi-site businesses

Seven per cent of businesses operated from multiple sites within the UK. Figure 15 shows that most controlled their own budget.

Figure 15: Control over purchasing decisions for communication services

Source: S2a. Which of the following best describes how much control your organisation has when it comes to making purchasing decisions in relation to communications services?
Base: All with single site/2-3 sites/4+ sites (n=1164/213/118).

3.5. Work arrangements

Overall, SMEs were largely office based (Figure 16), with 56% in self-contained offices and a further 3% with office/desk spaces in a managed office. More than eight in ten small (87%) or medium (82%) SMEs were based in self-contained offices/commercial premises.

Around a quarter (37%) of SMEs operated from a home office (higher than the 26% who did so in 2014). Home office working was more prevalent among SMEs based in sparsely populated areas and/or those who worked while travelling in the UK (49% vs. 37% overall).

Self-contained offices/commercial premises were more prevalent in Northern Ireland (66%).
Fifty-four per cent described their employees as being mainly/ entirely office based (Figure 17) and less than a quarter (23%) described their employees as working mainly/ entirely away from the office.

Half had employees who regularly worked from home, and 44% had employees who worked in sparsely populated areas, as shown in Figure 18. More than a third had employees who regularly worked in other specific locations (39%). Thirty-seven per cent worked while travelling in the UK, whereas working while travelling internationally was rarer (it occurred regularly in 13% of SMEs).

Those in Northern Ireland were least likely to regularly work from home (41%).

Overall, more than half (58%) had employees who worked in sparsely populated parts of the country and/or worked while travelling in the UK. This subgroup (referred to in this report as ‘remote/ on the move’) was of particular interest to the research in terms of understanding their communications needs (see Section 12 for a detailed analysis of this subgroup).
3.6. Customer profile

More than seven in ten (71%) of SMEs served customers mainly in their local area or region (Figure 19). Ten per cent did business outside the UK.

Sixty-nine per cent of the SMEs who worked in sparsely populated parts of the country and/or worked while travelling in the UK serviced customers outside their local area, compared to 58% among the total sample.

Among private companies (Figure 20), 39% serviced both business and consumer customers, 38% mainly serviced consumers and 22% had mainly business customers. One in three (30%) SMEs working in sparsely populated parts of the country and/or who worked while travelling in the UK serviced mainly other businesses, compared with 22% among the total sample.
3.7. General attitudes to communications technology and services

Figure 21 examines the general attitudes held by SMEs towards communications technology and services. Respondents were read a series of statements and asked to what extent they agreed or disagreed with each.

“Communications services are clearly fundamental to businesses”: 81% agreeing (63% with a strong opinion). Agreement was higher still among larger businesses (92% among those with 10-49 employees and 93% among those with 50-249).

Eighty-two per cent of SMEs felt that the needs of their business were well served by the communications market, and that information was widely available about communications products and services (76%, rising to 84% among medium SMEs). Those in remote rural locations were significantly less likely to agree that their business needs were well served (66% vs. 82%) and that information was widely available (69% vs. 76%).

Medium SMEs were more likely to agree that it was easy to identify which providers their business could potentially use (76% vs. 64%) and that they felt very well informed about how communications services could help them to survive and grow (77% vs. 66%).

One in seven (14%) felt the growth of their business had been affected by a lack of suitable products or services, a similar proportion to that recorded in 2014. Those in remote rural locations (28%), and medium SMEs (21%) were more likely to agree that this was the case. Those who agreed that growth had been hampered by a lack of suitable products or services were less satisfied with their internet services overall (66% versus 79% total sample), more likely to have experienced problems with their internet service in the past 12 months (72% vs. 47%) and more likely to have switched internet provider in the past two years (24% vs. 18%).

Source: P8. Are your customers or clients…*pie adds to more than 100% as spread across UK/other countries could be multi-coded
Base: total sample (n=1501)

Source: P9. And are your customers…
Base: All private companies (n=1281)
Around half of SMEs were aware of the regulations that protect their businesses when buying and using communications services. There was an increase in concern since 2014; 38% (up from 34%) felt that they did not have confidence in their ability to identify which new communications products or services would be the most valuable. Medium SMEs were less likely to lack confidence (21% agreed). More than two in five overall (42%) agreed that they were worried about possible breaches of security in their communications services.

Figure 21: General attitudes to communications technology and services

Source: QF1. Next, I’m going to read you a number of statements that people have made about their personal attitude towards communications technology and services. For each one, please can you tell me how much you agree or disagree with it? Base: total sample (n=1501)

Looking at differences in attitudes by UK nation, those in England were least likely to agree that they didn’t have confidence in their ability to identify which new communications products or services would be valuable (31% vs. 38% overall).

Those in Northern Ireland were least likely to agree that the needs of their business were well catered for in the communications market (77% vs. 82% overall). Eighteen per cent of SMEs in Northern Ireland agreed that “the ability of my business to grow has been impacted by the lack of suitable communications products and services available to me” (compared with 14% overall and 11% in England).

3.8. Sources of information about communication services

Overall, two-thirds of SMEs (and 77% of medium SMEs) said they felt very well informed about how communications services can help their businesses to survive and grow (Figure 21). Figure 22 shows which sources of information were used by SMEs to keep themselves informed about communications services.

1 Where “Q base diff” is indicated in the 2014 data column, these three statements were asked only of mobile users in the 2014 survey. In 2016 they were asked of all respondents. Comparisons should therefore be made with caution.
Search engines (67%) and word of mouth (66%) were the key sources of information, followed by provider websites (55%) and mainstream media (48%).

As was the case in 2014, medium sized SMEs (those with 50-249 employees) were more likely than SMEs in general to use all of the listed sources apart from word of mouth, where the proportion of use was similar. On average, SMEs used 4.2 sources of information (rising to 5.5 among medium SMEs).

Figure 22: Sources of information about communication services ²

<table>
<thead>
<tr>
<th>Source</th>
<th>50-249 employees (251)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Google/a search engine</td>
<td>67%</td>
</tr>
<tr>
<td>Friends/Colleagues</td>
<td>66%</td>
</tr>
<tr>
<td>Provider websites</td>
<td>55%</td>
</tr>
<tr>
<td>Mainstream media/press</td>
<td>48%</td>
</tr>
<tr>
<td>Independent review websites</td>
<td>36%</td>
</tr>
<tr>
<td>Provider newsletters/emails</td>
<td>36%</td>
</tr>
<tr>
<td>Govt. information websites/publications</td>
<td>22%</td>
</tr>
<tr>
<td>Advisory bodies</td>
<td>18%</td>
</tr>
<tr>
<td>Trade body website</td>
<td>18%</td>
</tr>
<tr>
<td>Specialist Industry magazines</td>
<td>17%</td>
</tr>
<tr>
<td>Ofcom website</td>
<td>12%</td>
</tr>
<tr>
<td>None of these</td>
<td>6%</td>
</tr>
</tbody>
</table>

Source: QF2. What sources of information do you use to keep yourself informed about the communications services your organisation uses? Base: total sample (n=1501)

Twelve per cent of SMEs said they used the Ofcom website. SMEs were also asked specifically if they were aware of Ofcom’s Advice for Businesses web pages, and just over a quarter (28%) claimed awareness (Figure 23), rising to 35% among medium SMEs.

² The green and red highlighting indicates significant difference to the total sample: green = significantly higher and red = significantly lower.
3.9. Use of Welsh among businesses based in Wales

Figure 24a shows that the majority (82%) of SMEs in Wales used English in their business dealings most or all of the time. When asked if any communications service providers communicated in Welsh, a quarter said they received printed communication in Welsh, a fifth said they used Welsh when speaking to their providers, and a tenth said their providers’ websites were available in Welsh.

When asked whether they would like their providers to use Welsh for each of these types of contact, SMEs in Wales were more likely to welcome website content in Welsh than to either speak Welsh with, or receive printed communications in Welsh from, their communications supplier. However, taking into account those who already received printed communication from, or spoke Welsh with, their provider, there is less demand overall for website content to be available in Welsh; the greatest demand is for printed information in Welsh. These findings were very similar to those recorded in 2014.
Figure 24a: Use of Welsh in business dealings

- All/most of the time: 8%
- Use equally with English: 7%
- Use English most of the time: 25%
- Never use Welsh: 37%

Source: P18. To what extent do you use the Welsh language in your business dealings? Base: all Welsh organisations (n=327)

Figure 24b: Current communications from communication service suppliers received in Welsh

- Printed information: 68%
- Spoken: 73%
- Website available in Welsh: 78%

Source: P19. Do any of your communications service suppliers communicate with you in Welsh in any form? P20. And would you like your communications service suppliers to… Base: all using Welsh to some degree (n=144)
4. Services used

**Summary**

The average annual spend on communications services was £1,371. Spend was strongly linked to size; micro SMEs spent £1,105 on average, while medium SMEs spent £11,323 on average.

The most commonly used services were fixed landline (96% of SMEs) and fixed internet (88% of SMEs). Mobile phones were used for business purposes by around two-thirds (64%) of SMEs. Faster/dedicated services such as ISDN, fibre/superfast, dedicated internet, managed VoIP etc. were largely the domain of the small and medium SMEs.

The majority of SMEs remained most reliant on fixed landline and fixed internet services. Mobile phones were important but not quite as prevalent.

BT continued to dominate across fixed landline and fixed internet services. Other than BT, both markets were highly fragmented.

Over half (53%) of all SMEs bought some or all of their communications services as part of a bundle. The most common bundle was fixed landline and internet (46% of all SMEs had this bundle, representing 87% of all bundles). BT supplied half of all bundles (52%).

Eleven per cent of SMEs were looking to upgrade existing services or acquire new services in the next 12 months; this rose to 28% among medium SMEs. The mostly commonly mentioned service was fibre broadband (6%).

Nine per cent of SMEs felt there were services that would benefit their business but which were not currently available to them; this rose to 17% among medium SMEs and 18% in SMEs based in remote rural locations. The mostly commonly mentioned service was fibre broadband (4%).

**4.1. Annual spend**

As in 2014, spend on communications services was strongly linked to company size; 87% of micro SMEs claimed to spend less than £2,000 annually, while 77% of medium SMEs spent more than £2,000 (Figure 25).
4.2. Communication services currently used

Figures 26 and 27 show which communication services were used by SMEs, both overall (Figure 26) and by company size and urbanity of the SME (Figure 27).

Figure 26 details the incidence of all types of communications services among the total sample. Figure 27 details the broad categories of communications services by number of employees and urbanity.

On average, SMEs used 3.3 services (rising to 4.5 for small and 5.4 for medium sized businesses).

Standard PSTN landline, fixed-line broadband and mobile phones (standard and smartphones) were the most commonly used services. Ninety-six per cent of SMEs overall used landlines (identical to the level recorded in 2014), while 64% used mobiles (similar to the 66% in 2014). The important change over time was an increase in use of smartphones (from 44% in 2014 to 49% in 2016,) and a decrease in the use of standard mobiles (22%, down from 36% in 2014).

Looking at the UK regions, SMEs in Northern Ireland were more likely to have fibre/superfast broadband (26% vs. 18% overall) and those in Scotland were less so (10%); 63% of SMEs in Scotland had copper/standard broadband compared with 53% overall.

The use of more dedicated/faster services was more common in small and medium SMEs than in micro-SMEs (Figure 27).

Sixteen per cent of SMEs did not use any fixed internet (broadband or dedicated). When asked why this was the case, more than half of these (57%) said the organisation had no need to access the internet. A fifth (21%) said they had access via mobile devices or dongles, 7% said the infrastructure was not available, and 3% mentioned the expense of having lines installed.
Figure 26: Communication services currently used

Source: QA1a Which of the following does your organisation use for business purposes? Base asked: total sample
QA2a Which of the following fixed broadband do you receive? Base asked: all with fixed-line broadband
QA2b Which of the following dedicated internet access do you use? Base asked: all with dedicated internet access
QA2c Which of the following ways do you access mobile broadband? Base asked: all with mobile internet access
Base for chart: total sample (n=1501)
The SME experience of communications services: research report

Figure 27: Communication services currently used (by size and urbanity)

<table>
<thead>
<tr>
<th></th>
<th>Number of employees</th>
<th>Urbanity</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1-4 (591)</td>
<td>1-9 (895)</td>
</tr>
<tr>
<td><strong>LANDLINE</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Standard PSTN landline</td>
<td>96% 96%</td>
<td>97% 96%</td>
</tr>
<tr>
<td>ISDN 2 / 2e</td>
<td>92% 91%</td>
<td>78% 60%</td>
</tr>
<tr>
<td>Advanced voice services</td>
<td>5% 5%</td>
<td>12% 16%</td>
</tr>
<tr>
<td>ISDN 30</td>
<td>1% 1%</td>
<td>24% 43%</td>
</tr>
<tr>
<td>Leased line/private circuit</td>
<td>2% 2%</td>
<td>9% 22%</td>
</tr>
<tr>
<td><strong>INTERNET</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fixed-line broadband</td>
<td>87% 87%</td>
<td>99% 99%</td>
</tr>
<tr>
<td>Mobile broadband via cellular network</td>
<td>80% 80%</td>
<td>81% 65%</td>
</tr>
<tr>
<td>Dedicated internet access</td>
<td>45% 44%</td>
<td>57% 70%</td>
</tr>
<tr>
<td>Fixed-wireless broadband</td>
<td>3% 3%</td>
<td>3% 5%</td>
</tr>
<tr>
<td>Satellite broadband service</td>
<td>1% 1%</td>
<td>1% 1%</td>
</tr>
<tr>
<td>Dial-up</td>
<td>0% 0%</td>
<td>0% 0%</td>
</tr>
<tr>
<td><strong>MOBILES</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Smartphones</td>
<td>64% 64%</td>
<td>72% 80%</td>
</tr>
<tr>
<td>Standard mobiles</td>
<td>49% 49%</td>
<td>58% 69%</td>
</tr>
<tr>
<td><strong>OTHER SERVICES</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other VoIP</td>
<td>12% 12%</td>
<td>24% 45%</td>
</tr>
<tr>
<td>Video conferencing</td>
<td>8% 8%</td>
<td>13% 22%</td>
</tr>
<tr>
<td>Managed VoIP</td>
<td>3% 3%</td>
<td>8% 18%</td>
</tr>
<tr>
<td></td>
<td>2% 2%</td>
<td>11% 24%</td>
</tr>
</tbody>
</table>

Source: QA1a Which of the following does your organisation use for business purposes? Base asked: total sample
Among SMEs with fixed-line broadband, standard ADSL/SDSL dominated (Figure 28). A quarter (23%) had fibre/superfast and 5% had cable. ADSL/SDSL connections were more common among smaller SMEs and those in rural locations (73% in rural, 72% in remote rural). Larger SMEs were more likely to have fibre/superfast (36% of small and 50% of medium SMEs).

Thirty-two per cent of SMEs with fixed-line broadband in Northern Ireland said they had fibre/superfast, compared with only 12% in Scotland (78% had copper/standard).

Figure 28: Type of fixed-line broadband

Source: QA2a Which of the following fixed broadband do you receive? Base: all with fixed-line broadband (n=1168).
Of the 5% of SMEs with dedicated internet, a third said this was provided via fibre Ethernet leased lines (Figure 29). Overall, 78% used some kind of Ethernet connection (rising to 90% of medium SMEs). A fifth did not know the source of their dedicated internet access.

**Figure 29: Type of dedicated internet**

- **Fibre Ethernet leased line**: 33%
- **Ethernet over copper (EFM)**: 16%
- **Dedicated Ethernet**: 13%
- **Ethernet over fibre to cabinet (GEA)**: 11%
- **Link direct from IP VPN**: 7%
- **Don’t know**: 22%

Source: QA2b Which of the following dedicated internet access do you use? Base: all with dedicated internet access, (n=232).
Of the 45% connecting to the internet via mobile broadband over a cellular network, the vast majority did this using smartphones (Figure 30). Larger SMEs (small and medium) were more likely than the average to access mobile internet via enabled devices such as tablets (36% of small, 45% of medium) or mobile broadband dongles connected to PCs (22% of small or medium).

SMEs in Wales with mobile internet access were more likely to use a dongle (20% vs. 12% overall).

**Figure 30: Ways of accessing mobile broadband**

<table>
<thead>
<tr>
<th>Method</th>
<th>Percentage</th>
<th>10-49</th>
<th>50-249</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smartphone</td>
<td>95%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enabled device e.g. tablet with mobile SIM</td>
<td>28%</td>
<td>10-49</td>
<td>50-249</td>
</tr>
<tr>
<td>Tethering smartphone to PC</td>
<td>21%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mobile broadband dongle to PC</td>
<td>12%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cellular router such as MIFI unit</td>
<td>5%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Don't know</td>
<td>1%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: QA2c Which of the following ways do you access mobile broadband? Base: all with mobile internet access, (n=768).
4.3. Importance of communication services currently used

Remembering that 81% of SMEs agreed (63% strongly) that communication services were fundamental to their business (Figure 21), it is unsurprising that when asked directly about the importance of individual services, very few users of fixed-line phones, fixed internet or mobile phones said these were not important (Figure 31).

As was the case in 2014, SMEs were most reliant on fixed landline and fixed internet services, with mobile phones in common use but not quite as crucial. Around two-thirds (64%) of SMEs said that fixed-line phones were ‘absolutely vital’ i.e. the business could not carry on without them (down from 69% in 2014).

Sixty per cent said this about fixed internet (the same as in 2014) and 52% said this about mobile phones (again, similar to the 51% recorded in 2014).

Figure 31: Importance of communication services currently used

<table>
<thead>
<tr>
<th>Service</th>
<th>Not Important (1-3)</th>
<th>Somewhat Important (4-7)</th>
<th>Very Important (8-9)</th>
<th>Absolutely Vital (10)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fixed phone</td>
<td>15%</td>
<td>18%</td>
<td>64%</td>
<td>3%</td>
</tr>
<tr>
<td>Fixed internet</td>
<td>16%</td>
<td>21%</td>
<td>60%</td>
<td>4%</td>
</tr>
<tr>
<td>Mobile phones</td>
<td>20%</td>
<td>23%</td>
<td>52%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Source: QA1a/b Which of the following communications services does your organisation use for business purposes? QF6. Thinking about each of the communication services your organisation uses, how important is each of these to your organisation? Please use a scale of 1 to 10 where 1 is not at all important, it would be inconvenient but you could live without it and 10 is absolutely vital - your business could not carry on without it.
Base: all users of each service (fixed phone n=1440, fixed internet n=1367, mobile phones n=1014)

Figure 32 looks at the importance of fixed internet services, depending on which type of broadband service SMEs said they were using. It shows that SMEs using fibre/ superfast broadband were the most reliant on their fixed internet service, with almost seven in ten (69%) of fibre/ superfast users claiming that fixed internet was ‘absolutely vital’ to them.
Figure 32: Important of fixed internet service, by type of broadband service used

<table>
<thead>
<tr>
<th>% of total using each service</th>
<th>Use ANY fixed Internet (n=1367)</th>
<th>Use fixed Broadband (n=1168)</th>
<th>Use ADSL/SDSL (n=721)</th>
<th>Use Cable (n=65)</th>
<th>Use Fibre/superfast (n=357)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not important (1-3)</td>
<td>16%</td>
<td>17%</td>
<td>18%</td>
<td>5%</td>
<td>12%</td>
</tr>
<tr>
<td>Somewhat important (4-7)</td>
<td>21%</td>
<td>21%</td>
<td>21%</td>
<td>22%</td>
<td>17%</td>
</tr>
<tr>
<td>Very important (8-9)</td>
<td>60%</td>
<td>59%</td>
<td>58%</td>
<td>51%</td>
<td>69%</td>
</tr>
<tr>
<td>Absolutely vital (10)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: QA2a. Including yourself, which of the following communications services does your organisation use? Base: total sample (n=1501)
QF6. Thinking about each of the communication services your organisation uses, how important is each of these to your organisation? Please use a scale of 1 to 10 where: 1 is not at all important, it would be inconvenient but you could live without it and 10 is absolutely vital - your business could not carry on without it. Base: All users of each service. (Bases as shown. Caution: low base for ‘use cable’, n=65)

4.4. Future communication service improvements

SMEs were asked whether they were actively looking to acquire or upgrade any communications services in the next 12 months. Figure 33 shows that 11% overall were looking to do this for any service (similar to the 12% recorded in 2014).

As was the case in 2014, this was correlated with business size, with more than a quarter of medium SMEs likely to be looking to acquire new services or upgrade existing services in the next 12 months (28%).

Fourteen per cent of SMEs in Wales said they were planning to get fibre broadband (vs. 6% overall).
Figure 33: Services actively looking to acquire/upgrade, in next 12 months

Source: QF5. And are there any communications services that you are actively looking at acquiring or upgrading in the next 12 months? Base: total sample (n=1501)

Related to this, SMEs were asked whether there were any communications services that were not currently available to their organisation but which they felt the business would benefit from. Nine per cent said this was the case, with fibre or faster broadband the most likely service mentioned (notably so in Wales).

SMEs in remote rural locations were more likely to feel that there were services their business would benefit from, but which were not available to them (18% vs. 9% overall), as were larger SMEs (15% of small and 17% of medium sized businesses). This matched the findings in 2014.
4.5. Main providers of communication services

Figure 34 examines the main providers of each service, and shows that BT dominated as the most-used supplier for landline and internet services, with the exception of satellite broadband, where the market was fragmented.

Medium SMEs were less likely to use BT for landline calls (44% vs. 51% overall), ISDN2/2e calls (37% vs. 59% overall) or any broadband internet access (45% vs. 52% overall). Those SMEs in remote rural locations were more likely to use BT for any broadband internet access (63% vs. 52% overall).

O2 was the most used mobile provider, followed by Vodafone and EE.

4.6. Bundling of services

Figures 35-37 look at the incidence and detail of bundled services.

As was the case in 2014, around half (53%) of SMEs had bundled services (Figure 35). Medium SMEs were less likely to bundle (41%).

The most likely bundle was fixed landline and broadband internet only (overall, 46% of all SMEs had this bundle combination, making it 87% of all bundles). Three per cent of all SMEs had a landline/broadband and mobile bundle.

Almost all those with bundles had services bundled with one supplier only (98%). Only 2% had more than one bundle. BT was overwhelmingly likely to be the supplier of bundles.
Figure 35: Any services bundled together from the same supplier?

*Only one service used
N/a* 11%
No 36%
Yes 53%

Yes

Source: QA3a. Are any of your services bundled together with the same supplier? Base: total sample (n=1501)

Figure 36: Services bundled (all bundles)

<table>
<thead>
<tr>
<th>Service</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fixed landline</td>
<td>95%</td>
</tr>
<tr>
<td>Broadband internet</td>
<td>87%</td>
</tr>
<tr>
<td>Mobile phone</td>
<td>9%</td>
</tr>
<tr>
<td>Mobile broadband</td>
<td>5%</td>
</tr>
<tr>
<td>Dedicated internet</td>
<td>4%</td>
</tr>
<tr>
<td>Leased lines</td>
<td>3%</td>
</tr>
<tr>
<td>Fixed wireless</td>
<td>2%</td>
</tr>
</tbody>
</table>

Source: QA3b. How many different suppliers do you have bundled services with? QA3c. And which of these services are supplied as a bundle package? Base: all bundles combined (n=819)

Figure 37: Bundle supplier (all bundles)

<table>
<thead>
<tr>
<th>Supplier</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>BT</td>
<td>52%</td>
</tr>
<tr>
<td>Unicom / Universal</td>
<td>7%</td>
</tr>
<tr>
<td>Virgin Media</td>
<td>5%</td>
</tr>
<tr>
<td>Talk Talk</td>
<td>4%</td>
</tr>
<tr>
<td>XLN telecom</td>
<td>4%</td>
</tr>
<tr>
<td>Plusnet</td>
<td>3%</td>
</tr>
</tbody>
</table>

Source: QA3d. What is the name of the company that provides this bundle? Base: all bundles combined (n=819)
5. Satisfaction

Summary

PSTN landline
Overall, 83% were satisfied and 7% dissatisfied with their PSTN line. The highest levels of dissatisfaction were with ease of contacting customer services (19% dissatisfied), clear and understandable contract terms (15%), quality of customer service staff (14%), and value for money (14%).

The highest levels of satisfaction with service were: geographic coverage (89% satisfied), reliability of connection (88%), and value for money (72%).

Internet (including ADSL, fibre, cable, dial-up, mobile and dedicated)
Satisfaction levels varied according to the type of internet. Sixty-nine per cent were satisfied with their fixed-line broadband overall (62% with ADSL, rising to 81% for fibre/superfast and 87% for cable). Of those with dedicated internet access, 85% were satisfied.

Overall, the highest levels of dissatisfaction were with connection speed (29% dissatisfied), ability to access the speed paid for (28%) and ease of contacting customer services (25%).

The highest levels of satisfaction with service were: reliability to send and receive emails (81% satisfied), geographic availability (74%), and quality of connection (73%).

Mobile phone (smartphones/ standard mobile phones)
Overall, 89% were satisfied with their smart or standard phones, and 5-7% dissatisfied. The highest levels of dissatisfaction were with geographic coverage (18%), and signal/connection reliability (16%).

The highest levels of satisfaction with service were with: reliability of smartphones for email/internet access (80% satisfied), value for money (78%), and signal/connection reliability (75%).

5.1. Satisfaction with services used

Figure 38 examines levels of satisfaction with various communication services (among users of those services). Satisfaction with fixed landline and mobile was generally good, despite a drop in scores since 2014. The lowest levels of satisfaction were with fixed-line broadband services (69% satisfied), especially ADSL (62%); this reflects a desire among SMEs for faster internet services. Those with cable (87% satisfied) and fibre/superfast (81%) broadband were significantly more satisfied than those with ADSL.

Few differences existed by nation. Those in Wales or Northern Ireland had higher levels of satisfaction with landline services (at an overall net level) than those in England or Scotland. Those in England and Northern Ireland had higher levels of satisfaction with internet services (again at an overall net level) than those in Scotland or Wales. There were no differences in mobile phone satisfaction.
Figure 38: Satisfaction with services used

<table>
<thead>
<tr>
<th>Service Type</th>
<th>DK/NA</th>
<th>Very dissatisfied</th>
<th>Fairly dissatisfied</th>
<th>Neither/nor</th>
<th>Fairly satisfied</th>
<th>Very satisfied</th>
<th>NET 2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard PSTN (1215)</td>
<td>4%</td>
<td>9%</td>
<td>39%</td>
<td>44%</td>
<td></td>
<td>83%</td>
<td>88%</td>
</tr>
<tr>
<td>Advanced voice services (131)</td>
<td>6%</td>
<td>12%</td>
<td>37%</td>
<td>41%</td>
<td></td>
<td>79%</td>
<td>n/a</td>
</tr>
<tr>
<td>Leased line (110)</td>
<td>6%</td>
<td>7%</td>
<td>8%</td>
<td>39%</td>
<td>36%</td>
<td>78%</td>
<td>91%</td>
</tr>
<tr>
<td>ISDN2/2e (346)</td>
<td>4%</td>
<td>6%</td>
<td>50%</td>
<td>35%</td>
<td>32%</td>
<td>81%</td>
<td>98%</td>
</tr>
<tr>
<td>ISDN30 (222)</td>
<td>6%</td>
<td>9%</td>
<td>50%</td>
<td>32%</td>
<td></td>
<td>81%</td>
<td>98%</td>
</tr>
<tr>
<td>Fixed-line broadband (1168)</td>
<td>12%</td>
<td>8%</td>
<td>11%</td>
<td>35%</td>
<td>33%</td>
<td>69%</td>
<td>n/a</td>
</tr>
<tr>
<td>ADSL (721)</td>
<td>16%</td>
<td>10%</td>
<td>12%</td>
<td>31%</td>
<td>51%</td>
<td>81%</td>
<td>93%</td>
</tr>
<tr>
<td>Fibre/superfast (357)</td>
<td>7%</td>
<td>9%</td>
<td>29%</td>
<td>31%</td>
<td>58%</td>
<td>87%</td>
<td>87%</td>
</tr>
<tr>
<td>Cable (65)</td>
<td>6%</td>
<td>4%</td>
<td>22%</td>
<td>33%</td>
<td>52%</td>
<td>85%</td>
<td>n/a</td>
</tr>
<tr>
<td>Dedicated Internet access (332)</td>
<td>4%</td>
<td>6%</td>
<td>11%</td>
<td>33%</td>
<td>52%</td>
<td>85%</td>
<td>n/a</td>
</tr>
<tr>
<td>Fixed-wireless broadband (605)</td>
<td>16%</td>
<td>10%</td>
<td>48%</td>
<td>43%</td>
<td></td>
<td>77%</td>
<td>n/a</td>
</tr>
<tr>
<td>Mobile broadband (768)</td>
<td>4%</td>
<td>7%</td>
<td>10%</td>
<td>48%</td>
<td>28%</td>
<td>76%</td>
<td>81%</td>
</tr>
<tr>
<td>Mobile phone (1427)</td>
<td>5%</td>
<td>4%</td>
<td>41%</td>
<td>54%</td>
<td>35%</td>
<td>89%</td>
<td>85%</td>
</tr>
</tbody>
</table>

Source: QB1a. Thinking about the (named) services your organisation uses, please can you tell me how satisfied or dissatisfied you are with your overall experience of each, using the following scale. Base: all users of each service (sample sizes as indicated) *NOTE: SMALL SAMPLE SIZE

Those dissatisfied with each service were asked why this was the case. Figure 39 summarises this by looking at the net figures of those dissatisfied with their various types of landline, internet or mobile services (the question was asked for specific services, but sample sizes were too small for analysis in several cases3).

Those dissatisfied with landline services were most likely to cite service quality/reliability, followed by poor customer services and connection issues. Seven in ten of those dissatisfied with the internet cited connection/speed issues, and two-fifths (44%) cited service quality/reliability. Mobile dissatisfaction was dominated by coverage and service quality/reliability issues.

3 Landline services included in ‘net’: standard PSTN, ISDN2/2e, ISDN30, advanced voice services. Mobile services included in ‘net’: standard, smartphone. Internet included in ‘net’: fixed line broadband, dedicated internet access, mobile broadband, fixed wireless broadband, dial-up, satellite broadband service.
The SME experience of communications services: research report

Figure 39: Drivers of overall dissatisfaction with service (among those dissatisfied)

Source: QB1b. You said you were dissatisfied with your (service) - why is this?
Base: all dissatisfied with landline, internet, mobile (n=114/274/64)* CAUTION: low base

Figure 40 looks at reasons for dissatisfaction based on the total sample (i.e. the incidence of issues among all SMEs using each service, not only those saying they were dissatisfied). The proportion saying they were NOT dissatisfied with each service is shown at the bottom of the table in green.

Drivers of overall dissatisfaction reflected the differing priorities of SMEs for each service. In particular, ADSL dissatisfaction was driven by connection/speed (20%) and reliability issues (12%).

Figure 40: Dissatisfaction with services used, based on total sample

<table>
<thead>
<tr>
<th>Reasons for dissatisfaction</th>
<th>PSTN</th>
<th>STANDARD MOBILE</th>
<th>SMARTPHONE</th>
<th>FIXED BB (net)</th>
<th>ADSL BB</th>
<th>CABLE</th>
<th>FIBRE/SF BB</th>
<th>MOBILE BB</th>
</tr>
</thead>
<tbody>
<tr>
<td>% Dissatisfied of all users</td>
<td>8%</td>
<td>6%</td>
<td>6%</td>
<td>20%</td>
<td>26%</td>
<td>4%</td>
<td>10%</td>
<td>11%</td>
</tr>
<tr>
<td>Service quality/reliability/faults</td>
<td>4%</td>
<td>3%</td>
<td>3%</td>
<td>9%</td>
<td>12%</td>
<td>4%</td>
<td>5%</td>
<td>3%</td>
</tr>
<tr>
<td>Coverage issues</td>
<td>-</td>
<td>5%</td>
<td>2%</td>
<td>0%</td>
<td>1%</td>
<td>0%</td>
<td>0%</td>
<td>6%</td>
</tr>
<tr>
<td>Customer service - general enquiries</td>
<td>2%</td>
<td>0%</td>
<td>2%</td>
<td>1%</td>
<td>2%</td>
<td>4%</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Customer service - complaints</td>
<td>2%</td>
<td>0%</td>
<td>1%</td>
<td>2%</td>
<td>2%</td>
<td>0%</td>
<td>0%</td>
<td>1%</td>
</tr>
<tr>
<td>Connection/speed issues</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>15%</td>
<td>20%</td>
<td>1%</td>
<td>6%</td>
<td>5%</td>
</tr>
<tr>
<td>Billing issues</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>1%</td>
<td>0%</td>
<td>2%</td>
<td>0%</td>
</tr>
<tr>
<td>Cost / value for money</td>
<td>1%</td>
<td>1%</td>
<td>0%</td>
<td>1%</td>
<td>1%</td>
<td>0%</td>
<td>1%</td>
<td>0%</td>
</tr>
<tr>
<td>Mis-selling/contract issues</td>
<td>1%</td>
<td>-</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Installation time</td>
<td>0%</td>
<td>-</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>-</td>
</tr>
<tr>
<td>Other</td>
<td>2%</td>
<td>0%</td>
<td>0%</td>
<td>1%</td>
<td>2%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>% NOT dissatisfied of all users</td>
<td>92%</td>
<td>94%</td>
<td>94%</td>
<td>80%</td>
<td>74%</td>
<td>96%</td>
<td>90%</td>
<td>89%</td>
</tr>
</tbody>
</table>

Source: QB1a. Thinking about the (INSERT SERVICE) services your organisation uses, please can you tell me how satisfied or dissatisfied you are with your overall experience, using the following scale. QB1b. You said you were dissatisfied with your (service) why is this? Base: all with standard PSTN landline (n=1215), smartphone (n=810), standard mobile (n=427), mobile broadband (n=768), fixed-line broadband (n=1168), all with ADSL (n=721), cable (n=65)* CAUTION: low base, fibre/superfast (n=357).
5.2. Satisfaction with landlines (PSTN)

Figure 41 examines in more detail satisfaction with standard PSTN landline services. Overall, 83% were satisfied with this service (down from 88% in 2014) and only 7% dissatisfied. Those in rural locations were less satisfied (75%) than those in urban (84%) and remote rural locations (88%).

Almost nine in ten (89%) were satisfied with geographic coverage (down from 92% in 2014). Eighty-eight percent were satisfied with reliability of their connection, although satisfaction was higher among SMEs based in urban locations (91%) than among those in rural ones (83%).

The main areas of dissatisfaction included ease of contacting customer services (19% dissatisfied), clear and understandable contract terms (15%), quality of customer service (14%) and value for money (14%).

Satisfaction with value for money was lower than in 2014 (72% vs. 78%), as was satisfaction with repair time for faults, although a significant proportion (almost a third of SMEs) gave ‘don’t know’/ ‘not applicable’ responses here, having had no particular experience on which to draw.

Looking at the regions, those in Northern Ireland were happier with the reliability of their signal/connection. Those in Scotland were least satisfied with the ease of contacting customer services, and the quality of its provision.

Figure 41: Satisfaction with landline service (standard PSTN)

Source: QB1a. Thinking about the (INSERT SERVICE) services your organisation uses, please can you tell me how satisfied or dissatisfied you are with your overall experience, using the following scale. Base: all users of standard PSTN landlines (n=1215). QB19. I am now going to read out some different aspects of the service experience. For each one, please can you tell me how satisfied or dissatisfied you are with this area of your organisation’s landline service. Base: PSTN landline users – all/answering on this service (n=979/374)

Figure 42 compares satisfaction levels on key dimensions by urbanity (urban, rural, remote rural). In this chart those responding ‘don’t know’ or ‘not applicable’ have been removed in order accurately to assess the satisfaction levels of those experiencing each element.
Overall, urban SMEs tended to be happier, and those in rural areas were least satisfied (notably, for value for money and understandable contract terms).

**Figure 42: Satisfaction with landline service: % satisfied by urbanity (excluding DK/NAs)**

Source: QB19. I am now going to read out some different aspects of the service experience. For each one, please can you tell me how satisfied or dissatisfied you are with this area of your organisation’s landline service. Base: PSTN landline users – all/answering on this service (bases vary by statement), excluding DK/NA

Figure 43 compares satisfaction levels on key dimensions, by size of SME. In this chart those responding ‘don’t know’ or ‘not applicable’ have been removed in order accurately to assess the satisfaction levels of those experiencing each element. On several statements, the base size for SMEs with 50-249 employees was too small to show, so the data have been supressed.
Figure 43: Satisfaction with landline service: % satisfied by number of employees (excluding DK/NAs)

Source: QB19. I am now going to read out some different aspects of the service experience. For each one, please can you tell me how satisfied or dissatisfied you are with this area of your organisation’s landline service.
Base: PSTN landline users – all/answering on this service (bases vary per statement). *CAUTION. There are some low base sizes (more than n=50 but fewer than n=99) for certain statements

5.3. Satisfaction with the internet

Figure 44 examines in more detail satisfaction with internet services. At this question, respondents were asked to think about their particular internet service. Satisfaction levels on several dimensions were lower than those recorded in 2014. However, we must remember that the 2016 survey included a broader definition of internet services, including mobile internet services, whereas in 2014 the focus was on fixed internet services.4

Eighty-one per cent were satisfied with the reliability to send and receive emails, and more than seven in ten with geographic availability (74%) and quality of connection (73%). Those in England were more satisfied than the other nations in terms of geographic availability (80% satisfied), while 31% of those in Wales were dissatisfied with the quality of connection (vs. 20% overall).

Key areas of dissatisfaction included the ability to access the speed paid for (28% dissatisfied), connection speed (29% dissatisfied) and ease of contacting customer services (25% dissatisfied). Respondents in England were more satisfied with connection speed than were those in Scotland or Wales.

4 For this question in 2014, the focus was on fixed internet services. Respondents answered the question if they had ADSL broadband (internet via fixed line), dial-up internet (via normal telephone line), cable broadband (internet via cable) or fibre broadband. In 2016, this definition was broadened to include dedicated internet access, mobile broadband delivered by a cellular network, and fixed-wireless broadband.
Figure 44: Satisfaction with internet service

<table>
<thead>
<tr>
<th>Category</th>
<th>Don’t know/ Not applicable</th>
<th>Very satisfied</th>
<th>Fairly dissatisfied</th>
<th>Neither/ nor satisfied</th>
<th>Fairly satisfied</th>
<th>Very satisfied</th>
<th>% Satisfied</th>
<th>2014 Q DIFF</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reliability to send &amp; receive emails</td>
<td>7%</td>
<td>7%</td>
<td>5%</td>
<td>44%</td>
<td>3%</td>
<td>37%</td>
<td>81%</td>
<td>Q DIFF</td>
</tr>
<tr>
<td>The geographic availability of the service</td>
<td>12%</td>
<td>9%</td>
<td>4%</td>
<td>40%</td>
<td>4%</td>
<td>34%</td>
<td>74%</td>
<td>80%</td>
</tr>
<tr>
<td>The reliability of the service in terms of the quality of the connection</td>
<td>11%</td>
<td>10%</td>
<td>6%</td>
<td>39%</td>
<td>3%</td>
<td>34%</td>
<td>73%</td>
<td>80%</td>
</tr>
<tr>
<td>Speed of connection</td>
<td>15%</td>
<td>14%</td>
<td>5%</td>
<td>36%</td>
<td>3%</td>
<td>28%</td>
<td>65%</td>
<td>71%</td>
</tr>
<tr>
<td>Ease of contacting Customer Services</td>
<td>9%</td>
<td>14%</td>
<td>11%</td>
<td>9%</td>
<td>3%</td>
<td>27%</td>
<td>57%</td>
<td>65%</td>
</tr>
<tr>
<td>Ability to access speed that has been paid for</td>
<td>5%</td>
<td>16%</td>
<td>12%</td>
<td>9%</td>
<td>3%</td>
<td>26%</td>
<td>58%</td>
<td>66%</td>
</tr>
<tr>
<td>Quality of service provided by Customer Services</td>
<td>12%</td>
<td>8%</td>
<td>9%</td>
<td>38%</td>
<td>3%</td>
<td>26%</td>
<td>63%</td>
<td>N/A</td>
</tr>
<tr>
<td>Value for money</td>
<td>10%</td>
<td>10%</td>
<td>12%</td>
<td>43%</td>
<td>3%</td>
<td>22%</td>
<td>66%</td>
<td>75%</td>
</tr>
<tr>
<td>The geographic availability of symmetrical services</td>
<td>13%</td>
<td>13%</td>
<td>11%</td>
<td>10%</td>
<td>3%</td>
<td>19%</td>
<td>53%</td>
<td>57%</td>
</tr>
<tr>
<td>Repair time for faults with connection</td>
<td>35%</td>
<td>6%</td>
<td>7%</td>
<td>10%</td>
<td>26%</td>
<td>16%</td>
<td>42%</td>
<td>53%</td>
</tr>
<tr>
<td>Clear and understandable T&amp;Cs of contract</td>
<td>8%</td>
<td>8%</td>
<td>8%</td>
<td>12%</td>
<td>4%</td>
<td>15%</td>
<td>65%</td>
<td>Q DIFF</td>
</tr>
</tbody>
</table>

Source: QB34. Now, thinking about your internet service, I am now going to read out some different aspects of the service experience. For each one, please can you tell me how satisfied or dissatisfied you are with this area of your internet service. Base: all with internet services/all answering on this service (n=1399/502).
Figure 45 looks at satisfaction with internet service, with data split out for users of fixed-line broadband (overall), ADSL broadband, fibre/superfast broadband and dedicated internet access. In this chart those responding ‘don’t know’ or ‘not applicable’ have been removed in order accurately to assess the satisfaction levels of those experiencing each element.

Users of fibre/superfast were generally happier with their service than were ADSL users. Satisfaction with repair time was highest among those with dedicated internet access.

**Figure 45: Satisfaction with internet service: % satisfied, by type of internet used (excluding DK/NAs)**

Source: QB34. Now, thinking about your internet service, I am now going to read out some different aspects of the service experience. For each one, please can you tell me how satisfied or dissatisfied you are with this area of your internet service. Base: all with internet services/ all answering on this service (bases vary by statement).

*CAUTION. There are some low base sizes (more than n=50 but fewer than n=99) for certain statements

Figure 46 compares overall satisfaction levels by urbanity (urban, rural, remote rural). Again, in this chart those responding ‘don’t know’ or ‘not applicable’ have been removed in order accurately to assess the satisfaction levels of those experiencing each element.

SMEs in rural areas were generally less satisfied (and those in urban areas more satisfied) especially with the availability, connection speed, speed paid for and reliability of the service. Customer service and repair elements showed the least differentiation.
Source: QB34. Now, thinking about your internet service, I am now going to read out some different aspects of the service experience. For each one, please can you tell me how satisfied or dissatisfied you are with this area of your internet service. Base: all with internet services/ all answering on this service (bases vary by statement).

*CAUTION. There are some low base sizes (more than n=50 but fewer than n=99) for certain statements.

Figure 47 compares satisfaction levels on key dimensions, by size of SME. In this chart those responding ‘don’t know’ or ‘not applicable’ have been removed in order accurately to assess the satisfaction levels of those experiencing each element.

As was the case with landline satisfaction, medium SMEs tended to be the most satisfied group in terms of their internet services, on several elements: connection quality, ease of contacting customer services and ability to access the speed paid for.
Figure 47: Satisfaction with internet service: % satisfied, by number of employees (excluding DK/NAs)

Source: QB34. Now thinking about your internet service, I am now going to read out some different aspects of the service experience. For each one, please can you tell me how satisfied or dissatisfied you are with this area of your internet service. Base: all with internet services/ all answering on this service (bases vary per statement).

*CAUTION. There are some low base sizes (more than n=50 but fewer than n=99) for certain statements.

5.4. Mobile phone service

Figure 48 shows that satisfaction with mobile phone services was largely high across the elements surveyed. Seventy-eight per cent felt that their mobile services offered value for money, and three-quarters (75%) were satisfied with their signal/connection reliability. Eight in ten smartphone users were satisfied with the service reliability for emailing/ internet access. Satisfaction with this element was higher in England and Northern Ireland than in Scotland or Wales.

Significant minorities were dissatisfied with geographic coverage (18% dissatisfied), and reliability of signal/connection (16%). Twenty-two per cent of those in Wales were dissatisfied with the reliability of their signal/connection, and 25% of those in Scotland were dissatisfied with geographic coverage.

Almost half of mobile users answered ‘don’t know’/ ‘not applicable’ when assessing repair time, indicating that they had no experience of this.
Figure 48: Satisfaction with mobile phone service

<table>
<thead>
<tr>
<th>Aspect</th>
<th>1%</th>
<th>0%</th>
<th>15%</th>
<th>1%</th>
<th>16%</th>
<th>8%</th>
<th>48%</th>
<th>4%</th>
<th>7%</th>
<th>8%</th>
<th>44%</th>
<th>36%</th>
<th>% Satisfied</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reliability of service for emailing/internet access (Smartphone users only)</td>
<td>4%</td>
<td>7%</td>
<td>8%</td>
<td>44%</td>
<td>36%</td>
<td>80%</td>
<td>78%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reliability of signal/connection</td>
<td>7%</td>
<td>9%</td>
<td>10%</td>
<td>42%</td>
<td>33%</td>
<td>75%</td>
<td>73%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ease of contacting Customer Services</td>
<td>15%</td>
<td>3%</td>
<td>7%</td>
<td>11%</td>
<td>32%</td>
<td>64%</td>
<td>66%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Value for money</td>
<td>4%</td>
<td>6%</td>
<td>12%</td>
<td>46%</td>
<td>31%</td>
<td>78%</td>
<td>81%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quality of Customer Services</td>
<td>16%</td>
<td>3%</td>
<td>5%</td>
<td>9%</td>
<td>39%</td>
<td>68%</td>
<td>N/A</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Clear &amp; understandable terms and conditions of contract</td>
<td>8%</td>
<td>5%</td>
<td>12%</td>
<td>12%</td>
<td>35%</td>
<td>64%</td>
<td>Q DIFF</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Geographic coverage</td>
<td>9%</td>
<td>9%</td>
<td>8%</td>
<td>45%</td>
<td>29%</td>
<td>73%</td>
<td>75%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Repair time for connection faults</td>
<td></td>
<td></td>
<td></td>
<td>48%</td>
<td>14%</td>
<td>33%</td>
<td>49%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: QB2. I am now going to read out some different aspects of mobile phone service experience. For each one, please can you tell me how satisfied or dissatisfied you are with this area of your organisation’s service. Base: mobile users – all/ answering on this service (n=1014/471).

There were no differences in satisfaction between users of standard mobile phones or smartphones (Figure 49). In this figure, those responding ‘don’t know’ or ‘not applicable’ have been removed in order accurately to assess the satisfaction levels of those experiencing each element.
The SME experience of communications services: research report

Figure 49: Satisfaction with mobile phone service: % satisfied, by type of mobile (excluding DK/NAs)

Source: QB2. I am now going to read out some different aspects of the service experience. For each one, please can you tell me how satisfied or dissatisfied you are with this area of your organisation’s mobile phone service. Base: Mobile users – all/answering on this service (bases vary per statement)

Figure 50 compares overall satisfaction levels by urbanity (urban, rural, remote rural). Again, those responding ‘don’t know’ or ‘not applicable’ have been removed in order accurately to assess the satisfaction levels of those experiencing each element.

Urban SMEs were typically more satisfied than those based in rural and remote rural locations with the reliability and coverage of their mobile phone service. Smartphone users in remote rural locations were less satisfied (60%) than those in rural (78%) or urban (89%) locations with the reliability of the service for emailing or accessing the internet.
Source: QB2. I am now going to read out some different aspects of the service experience. For each one, please can you tell me how satisfied or dissatisfied you are with this area of your organisation’s mobile phone service. Base: mobile users – all answering on this service (bases vary by statement). *CAUTION. There are some low base sizes (more than n=50 but fewer than n=99) for certain statements

Figure 51 compares satisfaction levels on key dimensions by size of SME. In this chart those responding ‘don’t know’ or ‘not applicable’ have been removed in order accurately to assess the satisfaction levels of those experiencing each element.

As was the case with landline and internet satisfaction, medium SMEs tended to be the most satisfied group, in terms of their mobile services, across the majority of elements. Small businesses (10-49 employees) tended to have the lowest satisfaction levels.
Figure 51: Satisfaction with mobile phone service: % satisfied, by number of employees (excluding DK/NAs)

Source: QB2. I am now going to read out some different aspects of the service experience. For each one, please can you tell me how satisfied or dissatisfied you are with this area of your organisation’s mobile phone service. Base: mobile users – all/ answering on this service (bases vary per statement). *CAUTION. There are some low base sizes (more than n=50 but fewer than n=99) for certain statements
6. Issues and problems

Summary

PSTN landlines

Twenty-four per cent had experienced any issues or problems with their PSTN landline services in the past 12 months; the key issue had been poor service reliability (14%). Among those experiencing poor service reliability or poor voice quality, 59% said this had resulted in a complete loss of service, and 42% said it had had a high level of impact on their business.

Internet

Forty-seven per cent had experienced any issues or problems with their internet services in the past 12 months; the key issue had been poor service reliability (31%) or slow upload/download speeds. SMEs in remote rural locations were more likely to have had problems (59%). Among those experiencing poor service reliability or slow upload/download speeds, 34% said this had resulted in a complete loss of service and 39% said it had had a high level of impact on their business.

Mobile

Thirty-two per cent had experienced any issues or problems with their mobile services in the past 12 months; the key issue had been poor mobile coverage (20%). SMEs in remote rural locations were more likely to have had problems (42%). Among those experiencing service reliability issues, 26% said this had resulted in a complete loss of service, and 35% said it had had a high level of impact on their business.
6.1. Problems experienced with service

6.1.1. Landlines (PSTN)

Standard PSTN landline users were asked whether they had encountered any issues or problems with their landline service in the past 12 months. Figure 52 shows that three-quarters had not.

Fourteen per cent said they had experienced poor service reliability, and 2% poor voice quality.

Figure 52: Issues/ problems experienced in past 12 months

<table>
<thead>
<tr>
<th>Issue</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>No problems/issues experienced</td>
<td>76%</td>
</tr>
<tr>
<td>Poor service reliability</td>
<td>14%</td>
</tr>
<tr>
<td>Poor customer service</td>
<td>4%</td>
</tr>
<tr>
<td>Increased charges</td>
<td>3%</td>
</tr>
<tr>
<td>Additional charges (unexpected)</td>
<td>2%</td>
</tr>
<tr>
<td>Poor voice quality</td>
<td>2%</td>
</tr>
<tr>
<td>Mis-selling</td>
<td>1%</td>
</tr>
<tr>
<td>T&amp;C’s you were not aware of</td>
<td>1%</td>
</tr>
<tr>
<td>Unsolicited/nuisance or silent calls</td>
<td>1%</td>
</tr>
<tr>
<td>Other</td>
<td>3%</td>
</tr>
</tbody>
</table>

Source: QB26. What, if any, issues or problems has your organisation encountered with your landline service in the last 12 months? Base: all PSTN landline users (n=979)

Those who had experienced poor service reliability or poor voice quality were asked about the impact of these issues on their business. Fifty-nine per cent said that the problem had resulted in complete loss of service (Figure 53), and around a fifth (for each) said that it had resulted in intermittent loss of service or poor service generally. When asked to assess the impact on their business of these same issues (Figure 54), 42% said they had had high impact (rating 8-10), 44% medium impact and 13% low impact.
Source: QB27. You said you experienced [poor voice quality or poor service reliability]. Did this problem /these problems result from a complete loss of service an intermittent loss of service or just a poor service generally? Base: all landline users experiencing poor voice quality or poor service reliability (n=163).

Source: QB29 And on a scale of 1 to 10 where 1 denotes ‘no impact at all’ and 10 denotes ‘very great impact’, to what extent did this/these problem(s) with landline service have an impact your business? Base: all landline users experiencing poor voice quality or poor service reliability (n=163).
6.1.2. Internet

Internet users were asked whether they had encountered any issues or problems with their internet service in the past 12 months. Figure 55 shows that just under half (47%) had experienced problems. Those in remote rural locations were more likely to have experienced problems (59% had done so), while 51% of those in Scotland had experienced problems, as had 52% in Northern Ireland.

One in three mentioned poor service reliability (rising to 40% of those in rural or remote rural locations). This was less of an issue in England (26%). Slow download speeds were cited by 19% (27% in remote rural and 26% in rural locations), and slow upload speeds by 17% (25% in remote rural or rural locations). Those in Northern Ireland were more likely than the other nations to mention slow download speeds.

Figure 55: Issues/ problems experienced in last 12 months

Source: QB42. What, if any, issues or problems has your organisation encountered with your internet service in the last 12 months? Base: all internet users (n=1399)

Those who had experienced poor service reliability or slow upload or download speeds were asked about the impact of these issues on their business. One in three (for each) said that the problem had resulted in complete loss of service, intermittent loss or service or poor service generally (Figure 56). When asked to assess the impact on their business of these same issues (Figure 57), 39% said they had had high impact (rating 8-10), 45% medium impact and 16% low impact.
6.1.3. Mobiles

Mobile users were asked whether they had encountered any issues or problems with their mobile phone service in the past 12 months. Figure 58 shows that around a third (32%) had experienced problems. Those in remote rural locations were more likely to have experienced problems (42% had done so). Those in England (28%) and Northern Ireland (27%) were less likely to have experienced problems than those in Scotland (38%) or Wales (37%)

A fifth cited poor mobile coverage (rising to 25% of those in Scotland or Wales, and 33% of SMEs in remote rural locations).
Figure 58: Issues/problems experienced in past 12 months

<table>
<thead>
<tr>
<th>Issue</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>No problems/issues experienced</td>
<td>68%</td>
</tr>
<tr>
<td>Poor mobile coverage</td>
<td>20%</td>
</tr>
<tr>
<td>Calls dropping out when making a voice call</td>
<td>6%</td>
</tr>
<tr>
<td>Poor mobile internet coverage</td>
<td>5%</td>
</tr>
<tr>
<td>Poor customer service</td>
<td>3%</td>
</tr>
<tr>
<td>Unexpected additional charges</td>
<td>3%</td>
</tr>
<tr>
<td>Poor voice quality</td>
<td>3%</td>
</tr>
<tr>
<td>Slow speeds connecting</td>
<td>2%</td>
</tr>
<tr>
<td>Increased charges</td>
<td>2%</td>
</tr>
<tr>
<td>Delays in receiving texts</td>
<td>2%</td>
</tr>
<tr>
<td>Mis-selling</td>
<td>1%</td>
</tr>
<tr>
<td>Unable to send texts</td>
<td>1%</td>
</tr>
</tbody>
</table>

Source: QB9. What, if any, issues or problems has your organisation encountered with your mobile phone service in the last 12 months? Base: all mobile/smartphone users. (n=1014)

Those who had experienced poor coverage, voice quality or other service reliability related elements (coloured pink in Figure 58) were asked about the impact of these issues on their business. A quarter said they had experienced complete loss of service, 37% intermittent loss of service and 36% poor service generally (Figure 59). When asked to assess the impact on their business of these issues (Figure 60), 35% said they had had high impact (rating 8-10), 42% medium impact and 22% low impact.

Figure 59: Did the problem result in...?

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complete loss of service</td>
<td>26%</td>
</tr>
<tr>
<td>Intermittent loss of service</td>
<td>37%</td>
</tr>
<tr>
<td>Poor service generally</td>
<td>36%</td>
</tr>
</tbody>
</table>

Source: QB10. You said you experienced [CODES 7-15 in questionnaire]. Did this problem/these problems result from a complete loss of service an intermittent loss of service or just a poor service generally? Base: all mobile/smartphone users experiencing (CODES 7-15 in questionnaire) (n=285).

Figure 60: Impact on your business

<table>
<thead>
<tr>
<th>Impact</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>High impact</td>
<td>35%</td>
</tr>
<tr>
<td>Low impact</td>
<td>22%</td>
</tr>
<tr>
<td>Medium impact</td>
<td>42%</td>
</tr>
</tbody>
</table>

Source: QB12 And on a scale of 1 to 10 where 1 denotes 'no impact at all' and 10 denotes 'very great impact', to what extent did this/these problem(s) with mobile service have an impact on your business? Base: all mobile/smartphone users experiencing (CODES 7-15 in questionnaire) (n=285).
7. Switching

In this section of the report we refer to the following categories of SME with regard to their switching behaviour and attitudes:

<table>
<thead>
<tr>
<th>Switchers</th>
<th>Switched provider in last 2 years</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Considerers</td>
<td>Currently actively considering switching provider (not switched in last 2 years)</td>
</tr>
<tr>
<td>Non-switchers</td>
<td>Never switched or considered switching</td>
</tr>
<tr>
<td>Non-recent switchers</td>
<td>Switched longer than 2 years ago and not currently actively considering switching</td>
</tr>
<tr>
<td>Past considerers</td>
<td>Considered switching in past 2 years but decided not to</td>
</tr>
</tbody>
</table>

**Summary**

**Overall levels of switching**
- Looking at all the communications services together, more than a quarter of SMEs had switched at least one of their landline, mobile or internet services in the past two years. Twenty per cent had switched one service, 7% had switched two services and 2% had switched all three.

**PSTN landline**
- Fifteen per cent of SMEs had switched in the past two years; 41% had never switched, and 7% were current considerers.
- Those considering switching were less satisfied with various aspects of their landline service, and also more likely to have experienced problems over the past 12 months.
- Among considerers, the main reasons for considering switching were poor customer service (39%), current provider too expensive (26%) and poor service reliability (23%).
- Key barriers to switching included difficulty in comparing network quality (57%), customer service (55%) and price (49%).
- Ultimately, the key reason to switch was getting a cheaper deal (60% of switchers cited this).
- Among those who had considered switching but decided not to, the key reasons were “just deciding not to bother” (35%), their current provider persuading them to stay (24%) or finding that there would be no cost benefit (16%).
- Non-switchers were likely to say they were “simply happy with their current provider”, to have higher levels of satisfaction with aspects of their landline service, and to be less likely to have experienced problems with the service in the past 12 months.
- Eighty-five per cent of switchers said they found the process easy/very easy, and the majority experienced no problems (60%). The main problems experienced were: an existing provider trying to persuade them to stay (23%), paying for two services during the switching process (19%), the previous provider sending bills for the cancelled service (17%) or the process taking longer than expected (16%).

**Internet (including ADSL, fibre, cable, dial-up, mobile and dedicated)**
- Eighteen per cent of SMEs had switched in the past two years; 46% had never switched, and 6% were current considerers.
- Those considering switching were less satisfied with various aspects of their internet service, and more likely to have experienced problems over the past 12 months.
Summary

- Among considerers, the main reasons for considering switching were: slow connection speed (45%), poor service reliability (41%), poor customer service (31%), current provider too expensive (29%), and cheaper deals elsewhere (25%).
- The main barriers to switching included difficulty in comparing network quality (68%), customer service (62%) and price (52%).
- Ultimately, the most popular reason for switching was getting a cheaper deal (35% of switchers cited this).
- Among those who had considered switching but decided not to, the key reasons were “just deciding not to bother” (21%) or their current provider persuading them to stay (20%).
- Non-switchers were likely to say they were “simply happy with their current provider”, to have higher levels of satisfaction with aspects of their internet service, and to be less likely to have experienced problems with their service in the past 12 months.
- Eighty-five per cent of switchers said they found the process easy/very easy, and the majority experienced no problems (52%). Key issues experienced were: the previous provider sending bills for the cancelled service (15%), the process taking longer than expected (14%) and temporary loss of service (13%).

Mobile phone (including standard and smartphones)

- Seventeen per cent of SMEs had switched in the past two years, 47% had never switched, and 3% were current considerers.
- Those considering switching were less satisfied with various aspects of their mobile service, and also more likely to have experienced problems over the past 12 months.
- Among considerers, the main reasons for considering switching were: poor mobile coverage (47%), current provider too expensive (26%), and cheaper deals elsewhere (24%).
- The main barriers to switching included difficulty in comparing network quality (62%), customer service (56%), and lack of differentiation between providers (54%).
- Ultimately, the key reason to switch was getting a cheaper deal (48% of switchers cited this) or better mobile coverage (33%).
- Among those who had considered switching but decided not to, the main reasons were their current provider persuading them to stay (22%), finding no cost benefit (19%), service availability (18%) or “just deciding not to bother” (16%).
- Non-switchers were likely to say they were simply happy with their current provider, to have higher levels of satisfaction with aspects of their internet service, and to be less likely to have experienced problems with their service in the past 12 months.
- Ninety-three per cent of switchers said they found the process easy/very easy, and the majority experienced no problems (70%). The main problems experienced were: the process taking longer than expected (13%), existing provider persuasion to stay, temporary loss of service, previous provider sending bills for cancelled service, and obtaining information on switching from previous provider (all at 10%).
7.1. Switching behaviour

7.1.1. Switching behaviour summary

Figure 61 shows that when looking at each market in isolation, around one in six SMEs had switched provider in the past two years. Nearly half had never switched, and only a very small proportion were currently considering switching provider. The proportion of considerers was higher in Wales, for landline and internet services, compared with the other nations.

Figure 61: Switching behaviour within each market

Source: QB5/22/38. Have you ever switched your mobile/internet/landline service provider? If so, when was this?
QB7/24/40. At any time in the last two years have you considered switching your mobile/internet/landline service provider? Base: all who have never switched and are not interested in switching (n=984/1356/949).
When looking at all markets together (Figure 62), more than a quarter of SMEs had switched at least one of their landline, mobile or internet providers in the past two years, while 20% had switched one service, 7% had switched two services and 2% had switched all three.

Figure 62: Overall switching incidence across all markets (total sample)

Source: All, based on total sample for this chart (n=1501) (but questions asked by services used: mobile, internet, landline). QB5/22/38. Have you ever switched your mobile/internet/landline service provider? If so, when was this? QC1 You told me earlier that you had switched your (services switched) in the last two years. Did you switch both/all three services at the same time? QC2 And did you switch your (services switched) to the same provider or to different providers?

7.1.2. Landlines (PSTN): switching classification

Figures 63-65 examine switching behaviour and attitudes towards future switching in relation to landline (standard PSTN) service providers.

Figure 63 shows that almost half (47%) of SMEs using standard PSTN landlines had never switched these services, while 15% had switched landline provider in the past two years. In terms of current mindset (Figure 64), almost three-quarters (72%) said they were not currently interested in moving to a new provider. Eight per cent were actively looking (rising to 13% in Wales) and a further 20% were open to the idea in principle.
Those who had never switched, or indicated an interest in switching in future, were then asked if they had considered switching their landline service provider in the past two years. Past and current behaviour, and attitude towards switching, are both shown in Figure 65, with a switching classification of SMEs, excluding the small proportion who could not remember their past switching behaviour.

---

Source: QB22. Have you ever switched your landline service provider? If so, when was this? Base: all with/answering about PSTN landline (n=979).

Source: QB23. What is your current thinking regarding changing the company that provides your landline service? Base: all with/answering about PSTN landline (n=979).

---

5 DK/CR indicates ‘don’t know’ or ‘can’t remember’.
Figure 65: Switching classification

![Switching classification chart](image)

Source: QB22. Have you ever switched your landline service provider? If so, when was this?
QB23. What is your current thinking regarding changing the company that provides your landline service?
QB24. At any time in the last two years have you considered switching your landline service provider?
Base: all with/answering about PSTN landline excluding those who could not remember their past switching behaviour (n=949).

Figure 66 defines these segments comprehensively.

**Figure 66: Switching classification definitions**

<table>
<thead>
<tr>
<th>Category</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Switchers</td>
<td>Switched provider in last 2 years</td>
</tr>
<tr>
<td>Current Considerers</td>
<td>Currently <em>actively</em> considering switching provider (not switched in last 2 years)</td>
</tr>
<tr>
<td>Non-switchers</td>
<td>Never switched or considered switching</td>
</tr>
<tr>
<td>Non-recent switchers</td>
<td>Switched longer than 2 years ago and not currently <em>actively</em> considering switching</td>
</tr>
<tr>
<td>Past considerers</td>
<td>Considered switching in past 2 years but decided not to</td>
</tr>
</tbody>
</table>

Source: QB22. Have you ever switched your landline service provider? If so, when was this?
QB23. What is your current thinking regarding changing the company that provides your landline service?
QB24. At any time in the last two years have you considered switching your landline service provider?
Base: all with/answering about PSTN landline excluding those who could not remember their past switching behaviour (n=949).
The SME experience of communications services: research report

Figure 67 looks at this switching classification by size and urbanity. It shows that medium SMEs, and those in rural areas, were somewhat more likely to have switched, or be current considerers.

Figure 67: Switching classification, by company size and urbanity

Source: QB22. Have you ever switched your landline service provider? If so, when was this?
QB23. What is your current thinking regarding changing the company that provides your landline service?
QB24. At any time in the last two years have you considered switching your landline service provider?
Base: all with/answering about PSTN landline, excluding those who could not remember their past switching behaviour (n=949, 500/ 713/ 177/ 59* CAUTION low base, 585/ 184/ 180).

7.1.3. Landlines (PSTN): attitudes towards switching service provider

Figure 68 examines attitudes towards switching landline service providers. The vast majority of SMEs were aware that they could port their number to a new provider (85%) and almost three-quarters (72%) felt there was a good choice of products and/or services available to their organisation.

Choice was clearly available, but comparison was difficult for some. The key barriers to switching landline provider were difficulty comparing suppliers on network quality, customer service, price and/or tariffs.

More than half (57%) agreed that it was difficult to make comparisons between providers on network quality, 55% for customer service (rising to 70% in Scotland) and 49% for price (rising to 60% in Scotland). Half (50%) said they found it difficult to compare the different tariffs available from landline service providers, and 37% of SMEs disagreed that the prices of services were clear and transparent.

More than half (51%) felt they were able to negotiate effectively with their provider on tariffs and services (rising to 71% in Northern Ireland), but a significant minority (27%) disagreed that this was the case.
Figure 68: Landlines: attitudes to switching

Source: QB30 Next, I’m going to read you a series of statements that businesses have made about switching landline service providers. For each one please can you tell me how much you agree or disagree with it? Base: PSTN landline (PSTN) users – all/ answering on this service (n=979/374)
Figure 69 shows how attitudes to switching compared among SMEs, by urbanity.

It shows that SMEs in remote rural locations felt it was harder to make comparisons between the different suppliers on the dimensions of network quality, customer service and price. Those in rural areas (i.e. those within ten miles of a large settlement) were the least likely to agree that they were able to negotiate effectively with their provider on tariffs and services.

**Figure 69: Landlines: attitudes to switching: % agreeing, by urbanity**

Source: QB30 Next, I’m going to read you a series of statements that businesses have made about switching landline service providers. For each one please can you tell me how much you agree or disagree with it?

Base: landline (PSTN) users – all/ answering on this service (n=601/249, 190/58* CAUTION LOW BASE SIZE, 188/67* Caution: low base size)
7.1.4. Landlines (PSTN): prompts and barriers to switching service provider

Figures 70 and 71 show the main reasons given for switching supplier (among the 15% of SME landline users classified as switchers), and the main reasons for considering switching (among the 7% of current considerers).

Poor customer service, current costs and poor reliability prompted consideration of switching, but ultimately finding a cheaper deal was the main reason to switch supplier.

Among the 7% of landline current considerers (Figure 71), 39% cited customer service as a key reason for thinking about switching supplier, 26% said their existing provider was too expensive, and 23% mentioned poor service reliability.

Among actual switchers (those who had switched in the past two years), the overwhelming rationale was a cheaper deal – with six in ten giving this as a main reason for switching landline supplier (Figure 70).

<table>
<thead>
<tr>
<th>Cheaper deal</th>
<th>60%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Offered a package that better fitted my needs</td>
<td>12%</td>
</tr>
<tr>
<td>Poor customer service</td>
<td>11%</td>
</tr>
<tr>
<td>Better customer service offered</td>
<td>10%</td>
</tr>
<tr>
<td>Better service reliability offered</td>
<td>8%</td>
</tr>
<tr>
<td>Poor service reliability</td>
<td>7%</td>
</tr>
<tr>
<td>Wanted to bundle my services</td>
<td>6%</td>
</tr>
<tr>
<td>Previous provider too expensive</td>
<td>5%</td>
</tr>
</tbody>
</table>

Source: QC3 and C17. What were your reasons for switching your landline provider? Base: all switchers <2 years (n=146)

| Poor customer service | 39% |
| Current provider too expensive | 26% |
| Poor service reliability | 23% |
| Cheaper deal available | 12% |
| Poor call quality | 9% |
| Wanted to bundle my services | 9% |
| Better customer service | 6% |
| Another provider offered a package better fitted needs | 6% |

Source: QB32. What are your reasons for considering switching your landline provider? Base: all considerers (n=53*). *CAUTION LOW BASE.
Looking at reasons for not switching, Figure 72 shows that being happy with the current provider, current providers’ persuasion to stay, and seeing no cost benefit to moving provider, were the key reasons not to switch.

Figure 72 examines the 41% of landline users who were non-switchers, and the 32% who were non-recent switchers. The main reason not to switch supplier among these SMEs was that they were simply happy with their current provider; almost seven in ten non-recent switchers said this, as did close to eight in ten non-switchers.

**Figure 72: Main reasons for not switching supplier**

<table>
<thead>
<tr>
<th>Reason</th>
<th>Non-Switchers</th>
<th>Non-Recent Switchers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Happy with current provider</td>
<td>79%</td>
<td>69%</td>
</tr>
<tr>
<td>Tied into existing contract</td>
<td>3%</td>
<td>13%</td>
</tr>
<tr>
<td>Don’t have time</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>No real difference between providers</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>Not enough choice of providers in our area</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>Too risky</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>No other provider available</td>
<td>3%</td>
<td>1%</td>
</tr>
</tbody>
</table>

Source: QB31. Why have you never switched/your landline provider? / Why have you not switched your landline provider in the last two years? Base: non-switchers/ non-recent switchers. (n=407/296)
7.1.5. Landlines (PSTN): the switching process

Switchers were asked further questions about the switching process they had gone through. Six in ten switchers described switching as ‘very easy’ and a further quarter (25%) as ‘fairly easy’ (Figure 73).

Although the majority therefore had no problems, 14% described switching as quite/very difficult.

All switchers were asked whether they had experienced any of a list of potential difficulties when switching their landline supplier (Figure 74). The majority (60%) said they had experienced no issues or problems. Almost a quarter (23%) said their existing provider had tried to persuade them to stay, while 19% said they had been paying for two services during the switching process.

Seventeen per cent said their previous provider had sent them bills for the cancelled service. Sample sizes are too small to analyse, but indicatively, for the majority, the main reason was problems with the provider’s billing process/systems, which resulted in bills being sent out. A couple of SMEs mentioned a notice period on their contract which meant they had to pay for the service even though it had been cancelled.

Sixteen per cent said the process took longer than they expected. Again, sample sizes are too small to analyse, but around a quarter of these SMEs cited technical problems.

Thirteen per cent said they had faced cancellation charges for early termination of contract. Sample sizes are too small to add meaningful follow-up analysis.

Figure 73: Ease of switching

- Don’t know: 9%
- Very difficult: 25%
- Quite difficult: 5%
- Fairly easy: 60%
- Very easy: 9%

Source: QC11andC22. Once you had decided which provider to use, how easy did you find it to switch? Base: all landline switchers (n=146).

Figure 74: Difficulties experienced when switching

- No problems experienced: 60%
- Existing provider tried to persuade you to stay: 23%
- Paying for two services during the switching process: 19%
- Previous provider sending bills for cancelled service: 17%
- Process took longer than expected: 16%
- Cancellation charges for early termination of contract: 13%
- Difficulty contacting provider to cancel service: 13%
- Technical issues: 12%
- Charged wrong amount by new provider: 9%
- Temporary loss of service: 8%
- Existing provider cancelled the switching process: 7%
- Difficulty arranging start and stop dates: 7%
- Obtaining information on switching from previous provider: 6%
- Difficulty porting telephone number(s): 5%
- Knowing how to switch: 4%

Source: QC4andQC20. Which, if any, of the following did you experience difficulties with when switching your landline supplier? Base: all landline switchers (n=146).
7.2. Switching behaviour in relation to internet service providers

7.2.1. Internet: switching classification

Figures 75-77 examine switching behaviour and attitudes towards future switching in relation to internet service providers.

Figure 75 shows that more than half (53%) of SMEs using internet services had never switched these services, while 18% had their switched internet provider in the past two years. In terms of their current mindset (Figure 76), almost two-thirds (65%) said they were not interested in a new provider at the current time, 8% were actively looking (rising to 14% in Wales), and a further 27% were open to the idea in principle.

Those who had never switched, or indicated an interest in switching in future, were then asked if they had considered switching their internet service provider in the past two years. Past and current behaviour, and attitude towards switching are shown together in Figure 77, with a switching classification of SMEs, excluding that small proportion who could not remember their past switching behaviour.

---

6 DK/CR indicates ‘don’t know’ or ‘can’t remember’
Figure 77: Switching classification

Switchers 18%  
Current Considerers 6%  
Non-recent switchers 24%  
Past considerers 6%  
Non-switchers 46%  

Source: QB38. Have you ever switched your internet service provider? If so, when was this?  
QB39. What is your current thinking regarding changing the company that provides your internet service?  
QB40. At any time in the last two years have you considered switching your internet service provider?  
Base: all with/answering about internet excluding those who could not remember their past switching behaviour (n=1356).

Figure 78 defines these segments comprehensively.

Figure 78: Switching classification definitions

<table>
<thead>
<tr>
<th>Category</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Switchers</td>
<td>Switched provider in last 2 years</td>
</tr>
<tr>
<td>Current Considerers</td>
<td>Currently actively considering switching provider (not switched in last 2 years)</td>
</tr>
<tr>
<td>Non-switchers</td>
<td>Never switched or considered switching</td>
</tr>
<tr>
<td>Non-recent switchers</td>
<td>Switched longer than 2 years ago and not currently actively considering switching</td>
</tr>
<tr>
<td>Past considerers</td>
<td>Considered switching in past 2 years but decided not to</td>
</tr>
</tbody>
</table>

Source: QB38. Have you ever switched your internet service provider? If so, when was this?  
QB39. What is your current thinking regarding changing the company that provides your internet service?  
QB40. At any time in the last two years have you considered switching your internet service provider?  
Base: all with/answering about internet excluding those who could not remember their past switching behaviour (n=1356).
The SME experience of communications services: research report

Figure 79 looks at this switching classification by size and urbanity. It shows that (as was the case with landline) medium SMEs and (to a lesser extent) those in rural areas were somewhat more likely to have switched or be current considerers.

Figure 79: Switching classification, by company size and urbanity

Source: QB38. Have you ever switched your internet service provider? If so, when was this?
QB39. What is your current thinking regarding changing the company that provides your internet service?
QB40. At any time in the past two years have you considered switching your internet service provider?

7.2.2. Internet: attitudes towards switching service providers

Figure 80 examines attitudes towards switching internet service provider.

Choice was clearly available (of products, services and providers) but for some respondents, comparison was difficult. The key barriers to switching internet provider were: difficulty comparing suppliers on network quality, customer service, price and/or tariffs.

More than two-thirds (68%) agreed that it was difficult to make comparisons between providers on network quality, 62% on customer service and 52% on price (rising to 69% in Northern Ireland). More than half (55%) said they found it difficult to compare the different tariffs available from internet service providers (rising to 65% in Northern Ireland) and 39% of SMEs disagreed that the prices of services were clear and transparent.

Less than half (47%) felt they were able to negotiate effectively with their provider on tariffs and services, and a significant minority (33%, rising to 50% in Northern Ireland) disagreed that this was the case.
Those in Northern Ireland were more likely to agree there was not enough choice of providers available (40% vs. 27% overall).

**Figure 80: Internet: attitudes to switching**

<table>
<thead>
<tr>
<th>Statement</th>
<th>All users</th>
<th>Don't know</th>
<th>Disagree strongly</th>
<th>Disagree slightly</th>
<th>Neither/nor</th>
<th>Agree slightly</th>
<th>Agree strongly</th>
</tr>
</thead>
<tbody>
<tr>
<td>It is difficult to make comparisons between providers on network quality</td>
<td></td>
<td>9%</td>
<td>5%</td>
<td>8%</td>
<td>10%</td>
<td>20%</td>
<td>47%</td>
</tr>
<tr>
<td>(reliability, speeds)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>There is a good choice of products and/or services available to my</td>
<td></td>
<td>6%</td>
<td>9%</td>
<td>9%</td>
<td>11%</td>
<td>25%</td>
<td>40%</td>
</tr>
<tr>
<td>organization</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>It is difficult to make comparisons between providers on customer service</td>
<td></td>
<td>11%</td>
<td>6%</td>
<td>10%</td>
<td>11%</td>
<td>25%</td>
<td>37%</td>
</tr>
<tr>
<td>It is difficult to compare the different tariffs that are available from</td>
<td></td>
<td>8%</td>
<td>12%</td>
<td>13%</td>
<td>12%</td>
<td>23%</td>
<td>32%</td>
</tr>
<tr>
<td>internet service providers</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The wording in my contract regarding charges if I terminate my service</td>
<td></td>
<td>15%</td>
<td>13%</td>
<td>12%</td>
<td>8%</td>
<td>20%</td>
<td>31%</td>
</tr>
<tr>
<td>early (known as an early termination charge)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>It is difficult to make comparisons between providers on price</td>
<td></td>
<td>9%</td>
<td>13%</td>
<td>19%</td>
<td>8%</td>
<td>23%</td>
<td>29%</td>
</tr>
<tr>
<td>I am able to negotiate effectively with my provider on tariffs and services</td>
<td></td>
<td>9%</td>
<td>20%</td>
<td>13%</td>
<td>11%</td>
<td>24%</td>
<td>24%</td>
</tr>
<tr>
<td>There is not much difference between the providers on the market</td>
<td></td>
<td>14%</td>
<td>12%</td>
<td>9%</td>
<td>18%</td>
<td>25%</td>
<td>22%</td>
</tr>
<tr>
<td>The prices of services are clear and transparent making it easy to make</td>
<td></td>
<td>11%</td>
<td>22%</td>
<td>17%</td>
<td>10%</td>
<td>20%</td>
<td>19%</td>
</tr>
<tr>
<td>comparisons between providers</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>There is not enough choice of providers available to my organisation</td>
<td></td>
<td>6%</td>
<td>33%</td>
<td>24%</td>
<td>11%</td>
<td>12%</td>
<td>15%</td>
</tr>
</tbody>
</table>

Source: QB46. Next, I’m going to read you a series of statements that businesses have made about switching internet service providers. For each one, please can you tell me how much you agree or disagree with it? Base: internet users – all/ answering on this service (n=1399/502).
Figure 81 shows how SMEs’ attitudes to switching compared, by urbanity.

It shows that SMEs in remote rural locations were less convinced that there was a good choice of products and providers available to them.

**Figure 81: Internet: attitudes to switching: % agreeing, by urbanity**

<table>
<thead>
<tr>
<th>Statement</th>
<th>Total sample</th>
<th>Urban</th>
<th>Rural</th>
<th>Remote Rural</th>
</tr>
</thead>
<tbody>
<tr>
<td>It is difficult to make comparisons between providers on network quality</td>
<td>65%</td>
<td>69%</td>
<td>62%</td>
<td>56%</td>
</tr>
<tr>
<td>There is a good choice of products and/or services available to my organization</td>
<td>69%</td>
<td>62%</td>
<td>62%</td>
<td>59%</td>
</tr>
<tr>
<td>is difficult to make comparisons between providers on customer service</td>
<td>56%</td>
<td>56%</td>
<td>56%</td>
<td>54%</td>
</tr>
<tr>
<td>is difficult to compare the different tariffs that are available from internet service providers</td>
<td>55%</td>
<td>58%</td>
<td>56%</td>
<td>51%</td>
</tr>
<tr>
<td>The wording in my contract regarding charges if I terminate my service early (known as an early termination charge) is clear and transparent</td>
<td>47%</td>
<td>42%</td>
<td>47%</td>
<td>41%</td>
</tr>
<tr>
<td>am able to negotiate effectively with my provider on tariffs and services</td>
<td>53%</td>
<td>51%</td>
<td>50%</td>
<td>44%</td>
</tr>
<tr>
<td>There is not much difference between the providers on the market</td>
<td>41%</td>
<td>41%</td>
<td>37%</td>
<td>30%</td>
</tr>
<tr>
<td>The prices of services are clear and transparent making it easy to make comparisons between providers</td>
<td>36%</td>
<td>38%</td>
<td>30%</td>
<td>21%</td>
</tr>
<tr>
<td>There is not enough choice of providers available to my organisation</td>
<td>38%</td>
<td>36%</td>
<td>30%</td>
<td>21%</td>
</tr>
</tbody>
</table>

Source: QB46. Next, I’m going to read you a series of statements that businesses have made about switching internet service providers. For each one, please can you tell me how much you agree or disagree with it?

Base: internet users – all/ answering on this service/ total/ urban/ rural near urban/ remote rural (n=502/330/98*/74*). *Caution low base
### 7.2.3. Internet: satisfaction with service

Figure 82 shows that those considering switching were more likely to have experienced problems with their service over the past 12 months, especially in relation to poor reliability/customer service and slow upload/download speeds.

Only 25% of considerers had experienced no problems or issues over the past 12 months, compared with 53% overall and 64% of non-switchers.

Fifty-five per cent of considerers had experienced poor service reliability, 28% poor customer service, 41% slow upload speeds and 38% slow download speeds.

#### Figure 82: Internet: problems experienced with internet service, by switching classification

<table>
<thead>
<tr>
<th>Issue</th>
<th>All users</th>
<th>Switchers</th>
<th>Considerers*</th>
<th>Non-Recent Switchers</th>
<th>Past Considerers</th>
<th>Non-Switchers</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>64%</td>
<td>42%</td>
<td>42%</td>
<td>43%</td>
<td>24%</td>
<td>23%</td>
</tr>
<tr>
<td>Poor service reliability</td>
<td>55%</td>
<td>55%</td>
<td>55%</td>
<td>54%</td>
<td>13%</td>
<td>15%</td>
</tr>
<tr>
<td>Slow download speeds</td>
<td>42%</td>
<td>28%</td>
<td>28%</td>
<td>27%</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>Slow upload speeds</td>
<td>43%</td>
<td>38%</td>
<td>38%</td>
<td>32%</td>
<td>13%</td>
<td>15%</td>
</tr>
<tr>
<td>Poor customer service</td>
<td>55%</td>
<td>41%</td>
<td>41%</td>
<td>38%</td>
<td>2%</td>
<td>1%</td>
</tr>
<tr>
<td>Unexpected additional charges</td>
<td>3%</td>
<td>3%</td>
<td>2%</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Increased charges</td>
<td>3%</td>
<td>3%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>3%</td>
</tr>
<tr>
<td>Mis-selling</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Poor installation of service by engineer</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>T&amp;C’s you were not aware of</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Source: QB42. What, if any, issues or problems has your organisation encountered with your internet service in the past 12 months? Base: all internet users (n= S: 273, C: 91*, N-RS: 298, PC: 68*, N-S: 626) *CAUTION LOW BASE
7.2.4. Internet: prompts and barriers to switching service provider

Figures 83 and 84 show the main reasons given for switching supplier (among the 18% of SME internet users classified as switchers), and the main reasons for considering switching (among the 6% of current considerers).

Slow connection speed, poor service reliability, the availability of cheaper deals and poor customer service all prompt consideration of switching, but getting a cheaper deal was the main reason to follow through.

Among the 6% of internet current considerers (Figure 84), 45% cited slow connection speed as a main reason for considering switching supplier, 41% mentioned poor service reliability and 31% poor customer service.

Among actual switchers (those who had switched in the past two years), the key rationale was a cheaper deal – with a third giving this as a main reason for switching internet supplier (Figure 83).

**Figure 83: Main reasons for switching supplier**

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cheaper deal</td>
<td>35%</td>
</tr>
<tr>
<td>Poor customer service previously</td>
<td>15%</td>
</tr>
<tr>
<td>Faster connection</td>
<td>14%</td>
</tr>
<tr>
<td>Fitted my needs better</td>
<td>12%</td>
</tr>
<tr>
<td>Better customer service</td>
<td>11%</td>
</tr>
<tr>
<td>Better range of services</td>
<td>10%</td>
</tr>
<tr>
<td>Want to bundle services</td>
<td>10%</td>
</tr>
<tr>
<td>Poor reliability previously</td>
<td>8%</td>
</tr>
<tr>
<td>Slow connection speed previously</td>
<td>8%</td>
</tr>
</tbody>
</table>

**Source:** QC3 and C23. What were your reasons for switching your internet provider? Base: all switchers <2 years (n=273)

**Figure 84: Main reasons for considering switching supplier**

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Slow connection speed</td>
<td>45%</td>
</tr>
<tr>
<td>Poor service reliability</td>
<td>41%</td>
</tr>
<tr>
<td>Poor customer service</td>
<td>31%</td>
</tr>
<tr>
<td>Current provider expensive</td>
<td>29%</td>
</tr>
<tr>
<td>Cheaper deal</td>
<td>25%</td>
</tr>
<tr>
<td>Faster connection offered</td>
<td>10%</td>
</tr>
<tr>
<td>Better customer service offered</td>
<td>6%</td>
</tr>
</tbody>
</table>

**Source:** QB48. What are your reasons for considering switching your internet provider? Base: all considerers (n=91*). *CAUTION LOW BASE
Looking at reasons for not switching, Figures 85 and 86 show that being happy with the current provider, current providers’ persuasion to stay, and seeing no cost benefit to moving provider, were the key reasons not to switch.

Figure 85 examines the 46% of internet users who were non-switchers, and the 24% who were non-recent switchers. The main reason not to switch supplier among these SMEs was that they were simply happy with their current provider; almost six in ten non-recent switchers said this, and almost seven in ten non-switchers. Among the 6% of internet users classified as past considerers (Figure 86), a fifth said the main reason not to switch, after considering it, was that they ‘just decided not to bother’ (21%), or that their existing provider persuaded them to stay (20%). One in ten could not see a cost benefit, or cited service availability, or a worry that they would lose service.

### Figure 85: Main reasons for not switching supplier

<table>
<thead>
<tr>
<th>Reason</th>
<th>Non-Switchers</th>
<th>Non-Recent Switchers</th>
</tr>
</thead>
<tbody>
<tr>
<td>I am happy with my current provider</td>
<td>67%</td>
<td>57%</td>
</tr>
<tr>
<td>We are tied into our existing contract</td>
<td>13%</td>
<td></td>
</tr>
<tr>
<td>Don't have time to look into switching</td>
<td>7%</td>
<td></td>
</tr>
<tr>
<td>Too risky</td>
<td>2%</td>
<td></td>
</tr>
<tr>
<td>There is no other provider available</td>
<td>5%</td>
<td></td>
</tr>
<tr>
<td>There is not enough choice of products or...</td>
<td>4%</td>
<td></td>
</tr>
</tbody>
</table>

### Figure 86: Main reasons not to switch after considering

<table>
<thead>
<tr>
<th>Reason</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Just decided not to bother</td>
<td>21%</td>
</tr>
<tr>
<td>Existing provider persuaded me to stay</td>
<td>20%</td>
</tr>
<tr>
<td>No cost benefit - couldn't find a lower monthly price</td>
<td>10%</td>
</tr>
<tr>
<td>Service availability</td>
<td>10%</td>
</tr>
<tr>
<td>Worried would lose service</td>
<td>10%</td>
</tr>
</tbody>
</table>

Source: QB47. Why have you never switched your internet provider? / Why have you not switched your internet provider in the last two years? Base: non-switchers/ non-recent switchers (n=626/298)

Source: QB49. Why did you decide not to switch your internet service provider after considering it? Base: all past considerers (n=68*) *CAUTION LOW BASE
7.2.5. Internet: the switching process

Switchers were asked further questions about the switching process they had gone through. More than half (55%) of switchers described switching as ‘very easy’ and a further 30% as ‘fairly easy’ (Figure 87). Medium SMES were more likely to find the process easy, with 67% describing it as ‘very easy’.

Although the majority therefore had no problems, 13% described switching as quite/very difficult.

All switchers were asked if they had experienced any of a list of potential difficulties when switching their internet supplier (Figure 88). The majority (52%) said they had experienced no issues or problems.

Fifteen per cent said their previous provider had sent them bills for the cancelled service. Sample sizes are too small to analyse, but indicatively, for the majority, the main reason for this was a problem with the provider’s billing process/systems.

Fourteen per cent said the process took longer than they expected. Again, sample sizes are too small to analyse, but about half of these SMEs cited technical problems and two-fifths mentioned a delay in receiving equipment.

Thirteen per cent had experienced a temporary loss of service and 9% said they had faced cancellation charges for early termination of contract.

Figure 87: Ease of switching

- Don’t know: 7%
- Very difficult: 30%
- Quite difficult: 15%
- Fairly easy: 55%
- Very easy: 6%

Source: QC11 and QC28. Once you had decided which provider to use, how easy did you find it to switch? Base: all switchers <2 years (n=273)

Figure 88: Difficulties experienced when switching

- No problems: 52%
- Provider sending bills for cancelled service: 15%
- Process took longer than expected: 14%
- Temporary loss of service: 13%
- Other cost/billing issue: 12%
- Provider persuasion to stay: 12%
- Paying for two services: 11%
- Difficulty contacting provider to cancel service: 10%
- Technical issues: 10%
- Cancellation charges for early termination of contract: 9%
- Obtaining information on switching from previous provider: 9%
- Difficulty arranging start and stop dates: 8%
- Knowing how to switch: 6%
- Difficulty getting a MAC from existing provider: 6%
- Existing provider cancelled switch: 5%
- Delay in receiving equipment: 5%

Source: QC4 and QC26. Which, if any, of the following did you experience difficulties with when switching your internet supplier? Base: all switchers <2 years (n=273)
7.3. Switching behaviour in relation to mobile service providers

7.3.1. Mobiles: switching classification

Figures 89-91 examine switching behaviour and attitudes towards future switching in relation to mobile service providers.

Figure 89 shows that more than half (55%) of SMEs using mobile phones had never switched these services, while 17% had switched mobile provider in the past two years. In terms of their current mindset (Figure 90), almost three-quarters (74%) said they were not interested in a new provider at the current time, 4% were actively looking and a further 22% were open to the idea in principle.

Source: QB5. Have you ever switched your mobile provider? If so, when was this?
Base: all with/ answering about mobile (n=1015).

Source: QB6. What is your current thinking regarding changing the company that provides your mobile?
Base: all with/ answering about mobile (n=1015).

Those who had never switched, or indicated an interest in switching in future, were then asked if they had considered switching their mobile service provider in the past two years. Past and current behaviour, and attitudes towards switching, are shown together in Figure 91, with a switching classification of SMEs, excluding that small proportion who could not remember their past switching behaviour.

7 DK/CR indicates ‘don’t know’ or ‘can’t remember’.
Figure 91: Switching classification

Source: QB5. Have you ever switched your mobile provider? If so, when was this?  
QB6. What is your current thinking regarding changing the company that provides your mobile?  
QB7. At any time in the last two years have you considered switching your mobile service provider?  
Base: all with/answering about mobile excluding those who could not remember their past switching behaviour (n=984).

Figure 92 defines these segments comprehensively.

Figure 92: Switching classification definitions

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Switchers</td>
<td>Switched provider in last 2 years</td>
</tr>
<tr>
<td>Current Considerers</td>
<td>Currently <em>actively</em> considering switching provider (not switched in last 2 years)</td>
</tr>
<tr>
<td>Non-switchers</td>
<td>Never switched or considered switching</td>
</tr>
<tr>
<td>Non-recent switchers</td>
<td>Switched longer than 2 years ago and not currently <em>actively</em> considering switching</td>
</tr>
<tr>
<td>Past considerers</td>
<td>Considered switching in past 2 years but decided not to</td>
</tr>
</tbody>
</table>

Source: QB5. Have you ever switched your mobile provider? If so, when was this?  
QB6. What is your current thinking regarding changing the company that provides your mobile?  
QB7. At any time in the last two years have you considered switching your mobile service provider?  
Base: all with/ answering about mobile excluding those who could not remember their past switching behaviour (n=984).
Figure 93 looks at this switching classification by size and urbanity. It shows that medium SMEs were more likely to have switched in the past, and were more open to the idea of switching. SMEs in remote rural locations were less likely to have switched mobile provider, possibly due to coverage issues.

Figure 93: Switching classification, by company size and urbanity

Source: QB5. Have you ever switched your mobile service provider? If so, when was this?
QB6. What is your current thinking regarding changing the company that provides your mobile service?
QB7. At any time in the last two years have you considered switching your mobile service provider?
All with/ answering about mobile excluding those who could not remember their past switching behaviour (n=984, 373/546/250)

7.3.2. Mobiles: attitudes towards switching service providers

Figure 94 examines attitudes towards switching mobile service providers. The vast majority were aware that they could port their number to a new provider (90%). More than three-quarters (78%) felt there was a good choice of products and/or services available to their organisation, and 71% disagreed that there was not a large enough choice of suppliers.

Choice was therefore clearly available, but for some respondents, comparison was difficult. As with landline and internet, the difficulty in comparing suppliers on network quality, customer service and/or prices, and a general lack of differentiation, emerged as the main barriers to switching.

Sixty-two per cent agreed that it was difficult to make comparisons between providers on network quality (rising to 74% in Scotland), 56% on customer service (rising to 65% in Scotland and 71% in Wales) and 43% on price. The majority (65%) disagreed that comparisons were difficult, due to the complexity of their service needs (rising to 82% in Scotland).
Source: QB13. Next, I’m going to read you a series of statements that businesses have made about switching mobile phone service providers. For each one, please can you tell me how much you agree or disagree with it? Base: mobile users – all/ answering on this service (n=1014/471).
Figure 95 shows how SMEs’ attitudes to switching compare, by urbanity.

It shows that those in remote rural locations were less aware that they could port their number, and were less convinced that there was a good choice of products/services and suppliers available to them.

Figure 95: Mobiles: attitudes to switching: % agreeing, by urbanity

<table>
<thead>
<tr>
<th>Statement</th>
<th>Total</th>
<th>Urban</th>
<th>Rural</th>
<th>Remote Rural</th>
</tr>
</thead>
<tbody>
<tr>
<td>I am aware I am able to transfer my existing number to a new provider</td>
<td>95%</td>
<td>92%</td>
<td>78%</td>
<td>70%</td>
</tr>
<tr>
<td>There is a good choice of products/services available to my organisation</td>
<td>83%</td>
<td>76%</td>
<td>65%</td>
<td>64%</td>
</tr>
<tr>
<td>I fully understand the wording of my contract</td>
<td>68%</td>
<td>63%</td>
<td>62%</td>
<td>59%</td>
</tr>
<tr>
<td>The prices of the products/services are clear and transparent,</td>
<td>75%</td>
<td>63%</td>
<td>63%</td>
<td>54%</td>
</tr>
<tr>
<td>It is difficult to make comparisons between providers on network quality</td>
<td>63%</td>
<td>59%</td>
<td>52%</td>
<td>44%</td>
</tr>
<tr>
<td>It is difficult to make comparisons between providers on customer service</td>
<td>59%</td>
<td>52%</td>
<td>45%</td>
<td>44%</td>
</tr>
<tr>
<td>There is not much difference between the providers on the market</td>
<td>64%</td>
<td>59%</td>
<td>49%</td>
<td>48%</td>
</tr>
<tr>
<td>It is difficult to make comparisons between price providers</td>
<td>59%</td>
<td>52%</td>
<td>45%</td>
<td>44%</td>
</tr>
<tr>
<td>There is not much difference between the providers because my service needs</td>
<td>63%</td>
<td>59%</td>
<td>49%</td>
<td>48%</td>
</tr>
<tr>
<td>There is not enough choice of suppliers available to my organisation</td>
<td>65%</td>
<td>59%</td>
<td>49%</td>
<td>48%</td>
</tr>
</tbody>
</table>

Source: QB13. Next, I’m going to read you a series of statements that businesses have made about switching mobile phone service providers. For each one, please can you tell me how much you agree or disagree with it? Base: mobile users – all/ answering on this service/ urban/ rural near urban/ remote rural (n=1014/657/200/157).
7.3.3. Mobiles: prompts and barriers to switching service provider

Figure 96 shows the main reasons given for switching supplier (among the 17% of SME mobile users classified as switchers).

Among those who had switched in the past two years, the key rationale was a cheaper deal; almost half (48%) gave this as their main reason for switching mobile supplier. However, seeking better mobile coverage was also a factor; a third (33%) claimed this as the main reason behind their recent supplier switch.

**Figure 96: Main reasons for switching supplier**

- Cheaper deal: 48%
- Better mobile coverage: 33%
- New provider offered a package fitted my needs better: 11%
- Poor mobile coverage previously: 9%
- Better mobile internet access: 8%
- Too expensive previously: 6%
- Poor customer service previously: 5%
- Better range of services: 5%
- Better mobile call quality: 5%
- Poor call quality previously: 4%

Source: QC3 and QC12. What were your reasons for switching your mobile phone provider?
Base: All switchers <2 years (n=225).
Looking at reasons for not switching, Figures 97 and 98 show that being happy with their current provider, existing provider persuasion to stay, and seeing no cost benefit to moving provider, are the key reasons not to switch.

Figure 97 examines the 47% of mobile users who were non-switchers, and the 26% who were non-recent switchers. The main reason not to switch supplier among these SMEs was that they were simply happy with their current provider; more than seven in ten non-recent switchers or non-switchers said this.

Among the 7% of mobile users classified as past considerers (Figure 98), a fifth said that their existing provider had persuaded them to stay (22%) and a similar proportion (19%) had found that there was no cost benefit in switching.

**Figure 97: Main reasons for not switching supplier**

- **I am happy with my existing provider**: 72% (73%)
- **Lack of Choice**: 5% (6%)
- **No real difference between providers**: 5% (4%)
- **We are tied into our existing contract**: 3% (7%)
- **Don’t have time to look into switching**: 4% (5%)

**Figure 98: Main reasons not to switch after considering**

- **Existing provider persuaded me to stay**: 22%
- **No cost benefit**: 19%
- **Service availability**: 18%
- **Just decided not to bother**: 16%
- **Worried that switching to new provider would result…**: 8%
- **Good relations with existing provider**: 8%
- **Favorable T&C’s from existing provider**: 7%

Source: QB14. Why have you never switched/your mobile provider? / Why have you not switched your mobile provider in the last two years? Base: non-switchers/ non-recent switchers (n=407/257).

Source: QB16. Why did you decide not to switch your mobile service provider after considering it? Base: all past considerers (n=52*). *CAUTION LOW BASE
7.3.4. **Mobiles: the switching process**

Switchers were asked further questions about the switching process they had gone through. Two-thirds (66%) of switchers described switching as ‘very easy’ and a further quarter (27%) as ‘fairly easy’ (Figure 99).

Although the majority had had no problems, 7% described switching as quite/very difficult.

All switchers were asked if they had experienced any of a list of potential difficulties when switching their mobile supplier (Figure 100). The majority (70%) said they had experienced no issues or problems.

Thirteen per cent said the process had taken longer than they expected. Sample sizes are too small to analyse, but around a third of these SMEs cited technical problems.

Ten per cent said their previous provider had sent them bills for the cancelled service. Again, sample sizes are too small to analyse, but indicatively, for the majority, the main reason for this was a problem with the provider’s billing process/systems.

Nine per cent said they had faced cancellation charges for early termination of contract. Sample sizes are too small to add meaningful follow-up analysis.

**Figure 99: Ease of switching**

- Very easy: 66%
- Fairly easy: 27%
- Don’t know: 6%
- Very difficult: 1%

Source: QC11 and QC16. Once you had decided which provider to use, how easy did you find it to switch?
Base: all mobile switchers (n=225).

**Figure 100: Difficulties experienced when switching**

- No problems: 70%
- Existing provider persuasion to stay: 13%
- Temporary loss of service: 10%
- Obtaining information on switching from previous provider: 10%
- Difficulty contacting provider to cancel service: 10%
- Difficulty arranging start and stop dates: 9%
- Difficulty getting a PAC from existing provider: 9%
- Technical issues: 8%
- Difficulty transferring email across to new service: 7%
- Paying for two services during the switching process: 7%
- Charging wrong amount by new provider: 6%
- Previous provider sending bills for cancelled service: 6%

Source: QC4 and QC13. Which, if any, of the following did you experience difficulties with when switching your mobile phone supplier?
Base: all mobile switchers (n=225).
8. Contracts

Summary

Fixed landline (standard PSTN)
- Sixty-nine per cent of SMEs had a contract; half of these were for up to two years in length. Of those with a contract, 70% had a business-specific contract, rising to 95% in medium SMEs. Nineteen per cent of those without a business contract thought business contracts were more expensive.
- Seventy-six per cent of those with a contract were aware of the terms and conditions of their contract; 62% agreed that these were plain and intelligible, but only 45% agreed that they were easy to understand and free of jargon.
- Ninety-six per cent felt it would be helpful to have all key terms presented ‘bold and upfront’. This would make 85% of them more likely to read their contract.
- Sixteen per cent had had problems because things were not specified in their contract, while 53% were aware that their contracts had details of early termination charges and how these were calculated (rising to 86% of medium SMEs).
- Seventy-seven per cent of those on a business contract were satisfied that their provider was fulfilling its service level agreement.

Fixed internet (including ADSL, fibre, cable and dial-up)
- Seventy per cent of SMEs had a contract; just over half of these were for up to two years in length. Two-thirds (67%) of those with a contract had a business-specific contract, rising to 94% among medium SMEs, and 30% of those without a business contract thought business contracts were more expensive.
- Seventy-three per cent of those with a contract were aware of the terms and conditions of their contract, and 57% agreed that these were plain and intelligible, but only 42% thought that they were easy to understand and free of jargon.
- Ninety-four per cent felt it would be helpful to have all the key terms presented ‘bold and upfront’ - this would make 91% more likely to read their contract.
- Fifteen per cent had had problems because things had not been specified in their contract; 53% were aware that their contracts had details of early termination charges and how these were calculated (rising to 69% of medium SMEs).
- Eighty-one per cent of those on a business contract were satisfied that their provider was fulfilling its service level agreement.

Mobile phone (including standard phones and smartphones)
- Seventy-six per cent of SMEs had a contract, with two-thirds of these up to two years in length. Fifty-three per cent of those with a contract had a business-specific contract, rising to 92% in medium SMEs, and 24% of those who did not have a business contract thought business contracts were more expensive.
- Eighty per cent were aware of the terms and conditions of their contract, 61% agreed that these were plain and intelligible, but only 43% thought that they were easy to understand and free of jargon.
- Ninety-two per cent felt that it would be helpful to have all the key terms presented ‘bold and upfront’; this would make 84% more likely to read their contract.
- Eleven per cent had had problems because things had not been specified in their contract, 57% were aware that their contracts had details of early termination charges and how these were calculated (rising to 73% of medium SMEs).
- Seventy-nine per cent of those on a business contract were satisfied that their provider was fulfilling its service level agreement.
8.1. Landlines

8.1.1. Landlines (PSTN): basic contracts

Figure 101 shows that two-thirds (69%) of SMEs with a standard PSTN landline had a fixed-term contract, and a further 15% had a rolling monthly contract. More than half (55%) of SMEs were on a contract of up to 2 years in length.

Figure 101: Length of landline service contract

<table>
<thead>
<tr>
<th>Contract Period</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Up to 1 year</td>
<td>19%</td>
</tr>
<tr>
<td>&gt;1 to 2 years</td>
<td>35%</td>
</tr>
<tr>
<td>&gt;2 to 5 years</td>
<td>15%</td>
</tr>
<tr>
<td>&gt;5 to 10 years</td>
<td>1%</td>
</tr>
<tr>
<td>Rolling monthly contract</td>
<td>15%</td>
</tr>
<tr>
<td>Contract period has ended</td>
<td>1%</td>
</tr>
<tr>
<td>Don't know</td>
<td>15%</td>
</tr>
</tbody>
</table>

Source: QB21 How long is your current contract for your landline service? Base: all landline sub-sample (n=374).

When asked how they had agreed their contract with their provider, around two-thirds (66%) of landline users with a contract said that this was over the telephone (rising to 82% among those in remote rural locations) and a fifth (18%) said it was via a visit from a salesperson or engineer (Figure 102).
Figure 102: Sales channel for contract

Source: QE1. Thinking back to when you first took out your contract with your provider of your landline service, where was the sales agreement with your contract provider reached? Base: Landline sub-sample with a contract (n=260). *Caution: low base size for 10-49 employees. SMEs with 50-249 employees are not shown because the sample size was too small (n=14).

The figures highlighted in red and green are significantly different compared to the other subgroups for that service, where green = significantly higher and red = significantly lower.
8.1.2. Landlines (PSTN): business-specific contracts

Landline-using SMEs with a contract were asked whether this was a specific business contract or whether they used an ordinary personal/residential service; 70% had a business-specific landline contract (Figure 103).

Small and medium organisations were more likely than micro-businesses to have a business-specific contract. Those without a business-specific contract for their landline were asked if they were aware that some business contracts provided enhanced services, and 57% said that they were aware of this.

**Figure 103: Incidence of business-specific contracts**

- All landline users: 70%
- 1-4 employees: 69%
- 1-9 employees: 69%
- 10-49 employees: 90%
- 50-249 employees: 95%

*Source:* QB20. Does your organisation have a specific business contract for this service or do you just use an ordinary personal/residential service? Base: PSTN landline users (n=979).
8.1.3. Landlines (PSTN): contract terms and conditions

Figure 104 shows that 76% of respondents claimed to be aware of the key terms and conditions of their contract and the majority (62%) felt that these were presented in a ‘plain and intelligible’ way.

Despite this, only 45% felt the terms and conditions were ‘easy to understand and free of jargon’. It is likely that some SMEs felt their terms were ‘intelligible’ but that they still contained some ‘jargon’, and when asked, almost all (96%) felt it would be helpful to have the key terms presented ‘bold and upfront’.

Only a small proportion (16%) had had problems because things had not been specified in the contract.

**Figure 104: Agreement that…**

<table>
<thead>
<tr>
<th>Statement</th>
<th>Disagree</th>
<th>Agree strongly</th>
<th>Agree slightly/strongly (NET)</th>
</tr>
</thead>
<tbody>
<tr>
<td>It would be helpful to have all key terms presented “bold and upfront” within a contract</td>
<td>3%</td>
<td>83%</td>
<td>96%</td>
</tr>
<tr>
<td>I would be more likely to read my contract if key terms were presented “bold and upfront”</td>
<td>10%</td>
<td>65%</td>
<td>85%</td>
</tr>
<tr>
<td>I am able to access the terms of my contract easily either because they were sent in a written format or are available online</td>
<td>9%</td>
<td>60%</td>
<td>78%</td>
</tr>
<tr>
<td>I am aware of the key T&amp;C’s of the contract</td>
<td>13%</td>
<td>42%</td>
<td>76%</td>
</tr>
<tr>
<td>I always read the T&amp;C’s of my communication contracts</td>
<td>24%</td>
<td>47%</td>
<td>68%</td>
</tr>
<tr>
<td>I find that my contract terms and conditions are plain and intelligible</td>
<td>22%</td>
<td>40%</td>
<td>62%</td>
</tr>
<tr>
<td>I typically find my contract Terms and Conditions easy to understand and free of jargon</td>
<td>39%</td>
<td>22%</td>
<td>45%</td>
</tr>
<tr>
<td>I have been surprised by a cost or condition imposed under Ts&amp;Cs</td>
<td>51%</td>
<td>25%</td>
<td>39%</td>
</tr>
<tr>
<td>I have lost out in other ways as a result of terms I was unaware of or did not realise would apply?</td>
<td>68%</td>
<td>14%</td>
<td>24%</td>
</tr>
<tr>
<td>I did not look at the key terms and conditions before I signed the contract</td>
<td>69%</td>
<td>13%</td>
<td>23%</td>
</tr>
<tr>
<td>I have had problems because of things that have not been specified in the contract</td>
<td>76%</td>
<td>9%</td>
<td>16%</td>
</tr>
</tbody>
</table>

Source: QE2. Please can you tell me how much you agree or disagree with the following statements about your contract?
Base: Landline users on an existing contract (not rolling monthly or out of contract period) (n=260).
Half (53%) of those on a landline contract were aware that their contract included details of early termination charges and how these were calculated (Figure 105), rising to 86% among medium SMEs.

Three-quarters (77%) of those on a business contract were satisfied that their provider was fulfilling its service level agreement (Figure 106).

**Figure 105:** Whether aware that contract has details of ETCs and how these are calculated (among contract holders)

- Yes: 53%
- Not sure: 34%
- No: 13%

**Figure 106:** Satisfaction that provider fulfils agreed levels of service (in SLA) (among those on a business contract)

- Extremely satisfied: 31%
- Satisfied: 46%
- Dissatisfied: 8%
- Not sure: 9%
- Extremely dissatisfied: 5%
- Neither: 2%
- DK: 1%

Source: QE4 Does the contract include details on charges due on termination of service and how these are calculated? Base: all landline sub-sample on a contract (n=260).

Source: QE5 Thinking of your service level agreement, also known as an SLA, how satisfied are you that your provider fulfils the agreed levels of service? Base: all landline subsample on a business contract for this service (n=214).
8.2. Internet

8.2.1. Internet: basic contracts

Figure 107 shows that two-thirds (70%) of SME internet users had a fixed-term contract (rising to 82% in Northern Ireland) and a further 14% had a rolling monthly contract. More than half (56%) of SMEs were on a contract of up to two years in length.

Figure 107: Length of internet service contract

When asked how they had agreed their contract with their provider, three-quarters (75%) of internet users with a contract said that this had been by phone, while one in ten had done it online (Figure 108).

Agreeing a contract during a visit from a salesperson or engineer was more common among small (19%) and particularly medium (45%) SMEs, compared to only 5% overall.

Source: QB37 How long is your current contract for your internet service? Base: all internet sub-samples (n=502).
Figure 108: Sales channel for contract

<table>
<thead>
<tr>
<th>Sales Channel</th>
<th>Total sample</th>
<th>Number of employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Over the phone</td>
<td>75%</td>
<td>77% 76% 60% 31%</td>
</tr>
<tr>
<td>Online</td>
<td>10%</td>
<td>10% 10% 9% 9%</td>
</tr>
<tr>
<td>During a visit by a sales person or engineer</td>
<td>5%</td>
<td>3% 4% 19% 45%</td>
</tr>
<tr>
<td>In a retail store</td>
<td>1%</td>
<td>2% 2% 0% 0%</td>
</tr>
<tr>
<td>Can’t remember</td>
<td>8%</td>
<td>8% 8% 7% 11%</td>
</tr>
</tbody>
</table>

Source: QE1. Thinking back to when you first took out your contract with your provider of your internet service, where was the sales agreement with your contract provider reached? Base: internet sub-sample with a contract (n=357, base as shown for business size). *Caution: low base size for 10-49 and 50-250 employees.

9 The figures highlighted in red and green are significantly different compared to the other subgroups for that service, where green = significantly higher and red = significantly lower.
8.2.2. Internet: business-specific contracts

Internet-using SMEs with a contract were asked whether they had a specific business contract or an ordinary personal/residential service; 67% had a business-specific internet contract (Figure 109).

Small and medium organisations were more likely than micro-businesses to have a business-specific contract. Those without a business-specific contract for their internet were asked if they were aware that some business contracts provided enhanced services, and 56% said that they were aware of this.

More than half (54%) the SMEs without a business-specific contract felt that their personal contract was fine for their business (Figure 110), while 30% thought business contracts were more expensive.

---

**Figure 109: Incidence of business-specific contracts**

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>All internet users</td>
<td>67%</td>
</tr>
<tr>
<td>1-4 employees</td>
<td>64%</td>
</tr>
<tr>
<td>1-9 employees</td>
<td>65%</td>
</tr>
<tr>
<td>10-49 employees</td>
<td>90%</td>
</tr>
<tr>
<td>50-249 employees</td>
<td>94%</td>
</tr>
</tbody>
</table>

**Source:** QB36. Does your organisation have a specific business contract for this service or do you just use an ordinary personal/residential service? Base: internet users (n=1399)

**Figure 110: Reason for not having a business-specific contract**

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal contract is fine for my business</td>
<td>54%</td>
</tr>
<tr>
<td>Business contracts are more expensive</td>
<td>30%</td>
</tr>
<tr>
<td>Never thought about it</td>
<td>15%</td>
</tr>
<tr>
<td>Even the smallest business packages offer more than I need</td>
<td>3%</td>
</tr>
<tr>
<td>Other</td>
<td>5%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>2%</td>
</tr>
</tbody>
</table>

**Source:** QE6 Why have you chosen not to have a business service for your (service)? Base: all internet sub-sample with personal/residential contract for (service) (n=55 *Caution: low base)
8.2.3. Internet: contract terms and conditions

Figure 111 shows that 73% of respondents claimed to be aware of the key terms and conditions of their contract and just over half (57%) felt that these were presented in a 'plain and intelligible' way.

Despite this, only 42% felt that the terms and conditions were 'easy to understand and free of jargon'. It is likely that some SMEs felt their terms were 'intelligible' but that they still contained some 'jargon', and when asked, almost all (94%) felt it would be helpful to have the key terms presented 'bold and upfront'.

Only a small proportion (15%) had had problems because things had not been specified in their contract.

**Figure 111: Agreement that...**

<table>
<thead>
<tr>
<th>Statement</th>
<th>Disagree</th>
<th>Agree slightly/ strongly</th>
<th>Agree strongly</th>
<th>NET</th>
</tr>
</thead>
<tbody>
<tr>
<td>It would be helpful to have all key terms presented &quot;bold and upfront&quot;</td>
<td>2%</td>
<td>80%</td>
<td>18%</td>
<td>4%</td>
</tr>
<tr>
<td>I would be more likely to read my contract if key terms were presented &quot;bold and upfront&quot;</td>
<td>6%</td>
<td>69%</td>
<td>25%</td>
<td>6%</td>
</tr>
<tr>
<td>I am aware of the key T&amp;C's of the contract</td>
<td>12%</td>
<td>50%</td>
<td>37%</td>
<td>78%</td>
</tr>
<tr>
<td>I always read the T&amp;C's of my communication contracts</td>
<td>31%</td>
<td>34%</td>
<td>5%</td>
<td>42%</td>
</tr>
<tr>
<td>I find that my contract terms and conditions are plain and intelligible</td>
<td>26%</td>
<td>46%</td>
<td>16%</td>
<td>57%</td>
</tr>
<tr>
<td>I typically find my contract Terms and Conditions easy to understand and free of jargon</td>
<td>46%</td>
<td>18%</td>
<td>18%</td>
<td>42%</td>
</tr>
<tr>
<td>I did not look at the key terms and conditions before I signed the contract</td>
<td>64%</td>
<td>11%</td>
<td>11%</td>
<td>28%</td>
</tr>
<tr>
<td>I have been surprised by a cost or condition imposed under Ts&amp;Cs</td>
<td>58%</td>
<td>8%</td>
<td>16%</td>
<td>27%</td>
</tr>
<tr>
<td>I have lost out in other ways as a result of terms I was unaware of or did not realise would apply?</td>
<td>71%</td>
<td>16%</td>
<td>13%</td>
<td>20%</td>
</tr>
<tr>
<td>I have had problems because of things that have not been specified in the contract</td>
<td>77%</td>
<td>9%</td>
<td>9%</td>
<td>15%</td>
</tr>
</tbody>
</table>

Source: QE2. Please can you tell me how much you agree or disagree with the following statements about your contract?
Base: internet users on an existing contract (not rolling monthly or out of contract period) (n=357).
Half (53%) of those on an internet contract were aware that their contract included details of early termination charges and how these were calculated (Figure 112), rising to 69% among medium SMEs.

More than four-fifths (81%) of those on a business contract were satisfied that their provider was fulfilling its service level agreement (Figure 113).

**Figure 112:** Whether aware that contract has details of ETCs and how these are calculated (among contract holders)

- Yes: 53%
- Not sure: 34%
- No: 13%

**Figure 113:** Satisfaction that provider fulfils agreed levels of service (in SLA) (among those on a business contract)

- Extremely satisfied: 27%
- Satisfied: 54%
- Neither: 10%
- Dissatisfied: 3%
- Extremely dissatisfied: 4%
- DK: 2%

Source: QE4 Does the contract include details on charges due on termination of service and how these are calculated? Base: all internet sub-sample on a contract (n=357).

Source: QE5 Thinking of your service level agreement, also known as an SLA, how satisfied are you that your provider fulfils the agreed levels of service? Base: All internet sub-sample on a business contract for this service (n=294).
8.3. Mobiles

8.3.1. Mobiles: basic contracts

Figure 114 shows that three-quarters (76%) of SMEs using mobile phones had a fixed-term contract (rising to 83% in Wales and 88% in Scotland) and a further 9% had a rolling monthly contract. Two-thirds (64%) of SMEs were on a contract of up to two years in length.

![Figure 114: Length of mobile service contract]

<table>
<thead>
<tr>
<th>Contract period</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Up to 1 year</td>
<td>14%</td>
</tr>
<tr>
<td>&gt;1 to 2 years</td>
<td>50%</td>
</tr>
<tr>
<td>&gt;2 to 5 years</td>
<td>12%</td>
</tr>
<tr>
<td>No contract - PAYG</td>
<td>7%</td>
</tr>
<tr>
<td>Rolling monthly contract</td>
<td>9%</td>
</tr>
<tr>
<td>Contract period has ended</td>
<td>1%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>7%</td>
</tr>
</tbody>
</table>

Source: QB4 How long is your current contract for your landline service? Base: all mobile sub-sample (n=471).

When asked how they had agreed their contract with their provider, around two-fifths (44%) of mobile users with a contract said that this was by phone (rising to 52% among those in remote rural locations) and a third (32%) said it was in a retail store (Figure 115).

Agreeing a contract during a visit from a salesperson or engineer was more common among small, and particularly medium, SMEs (26% and 46% respectively, compared with only 6% overall).
Figure 115: Sales channel for contract\textsuperscript{10}

<table>
<thead>
<tr>
<th>Sales Channel</th>
<th>Total Sample</th>
<th>Number of employees</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>1-4</td>
</tr>
<tr>
<td>Over the phone</td>
<td>44%</td>
<td>43%</td>
</tr>
<tr>
<td>In a retail store</td>
<td>32%</td>
<td>34%</td>
</tr>
<tr>
<td>Online</td>
<td>11%</td>
<td>11%</td>
</tr>
<tr>
<td>During a visit by a sales person or engineer</td>
<td>6%</td>
<td>4%</td>
</tr>
<tr>
<td>Can't remember</td>
<td>5%</td>
<td>6%</td>
</tr>
</tbody>
</table>

Source: QE1. Thinking back to when you first took out your contract with your provider of your landline service, where was the sales agreement with your contract provider reached? Base: mobile sub-sample with a contract including rolling/30-day contracts (n=407, bases shown by employee size). \textit{Caution: low base for 10-49 and 50-249 employees}.

\textsuperscript{10} The figures highlighted in red and green are significantly different compared to the other sub-groups for that service, where green = significantly higher and red = significantly lower.
8.3.2. Mobiles: business-specific contracts

Mobile-using SMEs with a contract were asked whether this was a specific business contract or if they just used an ordinary personal/residential service; 53% had a business-specific mobile contract (Figure 116), rising to 66% in Northern Ireland.

Small and medium organisations were more likely than micro-businesses to have a business-specific contract. Those without a business-specific contract for their mobile phones were asked if they were aware that some business contracts provided enhanced services, and 57% said that they were aware of this.

More than half (53%) the SMEs who did not have a business-specific contract felt that their personal contract was fine for their business (Figure 117), while 24% thought business contracts were more expensive.

Figure 116: Incidence of business-specific contracts

<table>
<thead>
<tr>
<th></th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>All mobile users</td>
<td>53%</td>
</tr>
<tr>
<td>1-4 employees</td>
<td>50%</td>
</tr>
<tr>
<td>1-9 employees</td>
<td>51%</td>
</tr>
<tr>
<td>10-49 employees</td>
<td>82%</td>
</tr>
<tr>
<td>50-249 employees</td>
<td>92%</td>
</tr>
</tbody>
</table>

Source: QB3. Does your organisation have a specific business contract for this service or do you just use an ordinary personal/residential service? Base: mobile users (n=1014).

Figure 117: Reason for not having a business-specific contract

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal contract is fine for my business</td>
<td>53%</td>
</tr>
<tr>
<td>Business contracts are more expensive/personal contracts are cheaper</td>
<td>24%</td>
</tr>
<tr>
<td>Never thought about it/considered it</td>
<td>18%</td>
</tr>
<tr>
<td>Even smallest/cheapest business packages higher levels of service than needs</td>
<td>6%</td>
</tr>
<tr>
<td>Haven't got round to switching to a business contract</td>
<td>4%</td>
</tr>
<tr>
<td>Other</td>
<td>8%</td>
</tr>
</tbody>
</table>

Source: QE6 Why have you chosen not to have a business service for your (service)? Base: all mobile sub-sample with personal/residential contract for (service) (n=111).
8.3.3. Mobiles: contract terms and conditions

Figure 118 shows that 80% claimed to be aware of the key terms and conditions of their contract, and the majority (61%) felt that these were presented in a ‘plain and intelligible’ way.

Despite this, only 43% felt the terms and conditions were ‘easy to understand and free of jargon’. It is likely that some SMEs felt their terms were ‘intelligible’ but that they still contained some ‘jargon’, and when asked, almost all (92%) felt it would be helpful to have the key terms presented ‘bold and upfront’.

Only a small proportion (16%) had had problems because things had not been specified in their contract.

Figure 118: Agreement that...

Source: QE2. Please can you tell me how much you agree or disagree with the following statements about your contract? Base: mobile users on an existing contract (including rolling/30-day contracts) (n=407).
More than half (57%) of those on a mobile contract were aware that their contract included details of early termination charges and how these were calculated (Figure 119), rising to 73% among medium SMEs.

More than three-quarters (79%) of those on a business contract were satisfied that their provider was fulfilling its service level agreement (Figure 120).

**Figure 119:** Whether aware that contract has details of ETCs and how these are calculated (among contract holders)

- Yes: 57%
- No: 8%
- Not sure: 35%

**Figure 120:** Satisfaction that provider fulfils agreed levels of service (in SLA) (among those on a business contract)

- Extremely satisfied: 32%
- Satisfied: 47%
- Neither satisfied nor dissatisfied: 14%
- Dissatisfied: 4%
- DK: 3%

Source: QE4 Does the contract include details on charges due on termination of service and how these are calculated? Base: all mobile sub-sample on a contract (n=407).

Source: QE5 Thinking of your service level agreement, also known as an SLA, how satisfied are you that your provider fulfils the agreed levels of service? Base: all mobile sub-sample on a business contract for this service (n=293).
9. Internet use

Summary

- The majority of SMEs were using the internet for web access, email and ordering goods and services. Online banking, hosting company websites and using HMRC services were also common; around seven in ten SMEs were doing each of these activities.

- Transacting with customers online was less common; about two in five SMEs were doing this.

- The use of more sophisticated services such as VPN, FTP sites and VoIP was more common among the medium SMEs.

- Forty-five per cent of SMEs were undertaking marketing online, most commonly using social media (77%). Medium SMEs were more likely to market themselves online (69%).

- Just under a third (23%) of SMEs with fixed internet used cloud services; this rose to 46% among medium SMEs.

- Nineteen per cent of SMEs already had, or said they might, switch from leased lines to fibre broadband; this rose to 39% among medium SMEs.
9.1. Internet application use

Figure 121 shows the incidence of using a number of internet applications for business purposes.

The majority of SMEs were using the internet for web access, email and ordering goods/services. Online banking, hosting company websites, HMRC services and looking for advice on regulation were also common activities.

Small and medium SMEs were undertaking more online, and the use of more sophisticated services such as VPN, FTP sites and VOIP were more common among the medium SMEs.

Those in England were significantly more likely than those in the other nations to be using online banking, or taking orders for goods or services online.

**Figure 121: Internet application use**

<table>
<thead>
<tr>
<th>Application</th>
<th>Total Sample</th>
<th>1-4 employees</th>
<th>1-9 employees</th>
<th>10-49 employees</th>
<th>50-249 employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accessing internet</td>
<td>97%</td>
<td>97%</td>
<td>99%</td>
<td>95%</td>
<td>98%</td>
</tr>
<tr>
<td>Email</td>
<td>95%</td>
<td>95%</td>
<td>98%</td>
<td>93%</td>
<td>98%</td>
</tr>
<tr>
<td>Ordering goods and services</td>
<td>84%</td>
<td>83%</td>
<td>88%</td>
<td>84%</td>
<td>86%</td>
</tr>
<tr>
<td>Online banking</td>
<td>71%</td>
<td>74%</td>
<td>80%</td>
<td>64%</td>
<td>64%</td>
</tr>
<tr>
<td>Company website</td>
<td>65%</td>
<td>65%</td>
<td>65%</td>
<td>63%</td>
<td>63%</td>
</tr>
<tr>
<td>Using HMRC services</td>
<td>65%</td>
<td>64%</td>
<td>64%</td>
<td>63%</td>
<td>63%</td>
</tr>
<tr>
<td>Looking for advice on regulation</td>
<td>63%</td>
<td>62%</td>
<td>67%</td>
<td>62%</td>
<td>63%</td>
</tr>
<tr>
<td>Paying for goods and services via BACS</td>
<td>57%</td>
<td>53%</td>
<td>53%</td>
<td>53%</td>
<td>57%</td>
</tr>
<tr>
<td>Looking for general business advice</td>
<td>54%</td>
<td>56%</td>
<td>56%</td>
<td>56%</td>
<td>59%</td>
</tr>
<tr>
<td>Using bespoke software or applications</td>
<td>39%</td>
<td>36%</td>
<td>36%</td>
<td>36%</td>
<td>36%</td>
</tr>
<tr>
<td>Other Online marketing</td>
<td>37%</td>
<td>36%</td>
<td>36%</td>
<td>36%</td>
<td>36%</td>
</tr>
<tr>
<td>Taking orders for goods and services online</td>
<td>36%</td>
<td>32%</td>
<td>32%</td>
<td>40%</td>
<td>40%</td>
</tr>
<tr>
<td>Online data storage or back-up</td>
<td>33%</td>
<td>29%</td>
<td>29%</td>
<td>30%</td>
<td>30%</td>
</tr>
<tr>
<td>Cloud services</td>
<td>29%</td>
<td>28%</td>
<td>28%</td>
<td>28%</td>
<td>28%</td>
</tr>
<tr>
<td>Taking payment for goods and services online</td>
<td>28%</td>
<td>27%</td>
<td>27%</td>
<td>27%</td>
<td>27%</td>
</tr>
<tr>
<td>Online advertising</td>
<td>28%</td>
<td>27%</td>
<td>27%</td>
<td>27%</td>
<td>27%</td>
</tr>
<tr>
<td>Remote log-in to your work PC or laptop</td>
<td>20%</td>
<td>19%</td>
<td>19%</td>
<td>19%</td>
<td>19%</td>
</tr>
<tr>
<td>File Transfer Protocol or FTP</td>
<td>19%</td>
<td>19%</td>
<td>20%</td>
<td>20%</td>
<td>20%</td>
</tr>
<tr>
<td>VoIP</td>
<td>18%</td>
<td>17%</td>
<td>17%</td>
<td>17%</td>
<td>17%</td>
</tr>
<tr>
<td>VPN</td>
<td>18%</td>
<td>18%</td>
<td>18%</td>
<td>18%</td>
<td>18%</td>
</tr>
<tr>
<td>Online video conferencing</td>
<td>9%</td>
<td>9%</td>
<td>9%</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>Company Intranet</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Company extranet</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Source: QA6 Which, if any, of the following internet applications does your organisation use for business purposes? Base: all with fixed or mobile internet (n=1389, 1-4 n=509, 1-9 n=794, 10-49 n=347, 50-249 n =248).
9.2. Smartphone use for business purposes

Those with smartphones were asked what these were used for in the business (Figure 122). Four-fifths were using their smartphones to send and receive email (82%), for web browsing (80%) and when working outside office hours (80%).

Small and medium SMEs were undertaking more activities on their smartphone than were micro businesses. Those in Northern Ireland were significantly more likely than those in other nations to be using smartphones for sending/receiving emails (94%), accessing business documents while out of the office (62%) or sending/receiving messages via instant messaging services (57%).

Figure 122: Smartphones – use for business purposes

Source: QA5 Thinking now about the smartphone(s) your organisation uses, which of the following do you or your staff ever use a smartphone for business purposes? Base: all with smartphones (n=810).
9.3. Online marketing

Marketing their business online was more common among larger SMEs (Figure 123). Overall, 45% of SMEs using fixed or mobile internet services used online marketing, rising to 69% of medium-sized organisations.

Figure 123: Use of online marketing

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total sample</td>
<td>45%</td>
</tr>
<tr>
<td>1-4 employees</td>
<td>44%</td>
</tr>
<tr>
<td>1-9 employees</td>
<td>44%</td>
</tr>
<tr>
<td>10-49 employees</td>
<td>63%</td>
</tr>
<tr>
<td>50-249 employees</td>
<td>69%</td>
</tr>
<tr>
<td>Urban</td>
<td>46%</td>
</tr>
<tr>
<td>Rural</td>
<td>40%</td>
</tr>
<tr>
<td>Remote Rural</td>
<td>50%</td>
</tr>
</tbody>
</table>

Source: QA6 Which, if any, of the following internet applications does your organisation use for business purposes? Base: all with fixed or mobile internet (n=1389).

Those using online marketing were asked which services or tools they used on a regular basis (at least once a month). Figure 124 shows that social media websites/apps were the most common, used by 77% of those using online marketing (rising to 90% of medium SMEs).

Medium SMEs were more likely than other sizes of business to advertise on local media websites/apps, use email newsletters or run blogs/forums.

Those in Northern Ireland were significantly more likely than those in other nations to use email newsletters (39% vs. 27% overall), while 51% of those in Wales were advertising/marketing on vertical services (vs. 38% overall).
Figure 124: Services/tools used on a regular basis (among online marketing users)

- Social media websites / apps: 77%
- Advertise / market on a ‘vertical’ service: 38%
- Advertise on website / app of local media: 30%
- Email newsletter: 27%
- Your own blog or forum: 23%
- Advertise with Google: 23%
- Sell / advertise on an online market place such as eBay / Amazon Market: 15%

Source: QA7. You said you use the internet for online marketing. Which, if any, of the following websites and tools does your organisation engage with or use on a regular basis – that is, at least once a month? Base: online marketing users (n=764).
9.4. Incidence of replacing leased lines with fibre broadband

A fifth (19%) of SMEs already had, or said they might, switch from leased lines to fibre broadband (Figure 125).

Figure 125: Incidence of replacing leased lines with fibre broadband

Source: QA1a. Including yourself, which of the following communications services does your organisation use? Base: total sample (n=1501).

QA4a. Thinking about your leased lines, are you considering switching from using leased lines to using a fibre broadband service instead in the next 12 months? Base: all with leased lines and not fibre broadband (n=229)

QA4b. Thinking about your fibre/superfast broadband service, did this service replace a leased-line service? If yes, was this in the last 12 months or longer ago? Base: all with fibre broadband and not leased lines (n=308).
10. Focus on confidence

Summary

Based on agreement or disagreement with the statement: “I don't have confidence in my ability to identify which new communications products or services would be valuable for the organisation”, respondents were classified as ‘more confident’ or ‘less confident’. A summary of key differences between the two groups follows:

SME characteristics
- There were very few differences in terms of turnover, job title, work habits or customer type.
- ‘More confident’ respondents were more likely to be urban (62% vs. 56%) and more likely to work in self-contained premises rather than at home (59% vs. 53%). They were more likely to work in services (34% vs. 32%) and less likely to work in agriculture (7% vs. 12%) or primary businesses (20% vs. 24%). They had a slightly larger company size, with an average of four rather than three employees.
- They were more positive about, and overall, more aware of the communications market.

Services used
- The ‘more confident’ had a higher total annual communications spend (£1,515 vs. £1,282).
- They had higher use of the internet (90% vs. 85%), mobile broadband (48% vs. 40%) and smartphones (52% vs 45%), and there was a higher level of importance placed on communications services: landline: 83% vs. 79%, internet: 81% vs. 82%, mobiles: 77% vs. 73%.
- They used a wider range of internet applications (online banking: 77% vs. 65%, HMRC services: 68% vs. 61%, FTP: 25% vs. 13%).

Satisfaction
- The ‘more confident’ had slightly higher levels of overall satisfaction with services (e.g. standard mobile phones: 94% vs. 86%, advanced voice services: 88% vs. 66%) and somewhat higher levels of satisfaction with almost all specific aspects of landline/internet/mobile services.

Switching
- There was no significant difference between the more and less confident groups in their switching classification for landlines or mobiles. The ‘more confident’ were slightly more likely to be a 12-month internet switcher (13% vs. 9%).
- The ‘more confident’ were more positive overall about the choices available and the ease of comparing offerings.

Problems with service
- The ‘more confident’ were slightly less likely to have experienced problems in the last 12 months (landline: 21% vs. 27%, internet: 45% vs. 50%, mobiles: 31% vs. 35%).

Contracts
- The ‘more confident’ were more likely to have a business-specific contract (landline: 73% vs. 69%, internet: 71% vs. 66%, mobiles: 56% vs. 53%) and be more aware of the terms and conditions of the contract (all with any contract: 85% vs. 69%).
- They had higher awareness of early termination charges and how these were calculated (all with any contract: 61% vs. 47%), and higher satisfaction that their provider was fulfilling its service level agreement (all with any contract: 86% vs. 73%).
10.1. General attitudes to communication technology and services

Figure 126 shows that although communications services are just as fundamental to the less-confident businesses, these businesses are less likely than the more confident businesses to feel that their business needs are being catered for.

As was the case in 2014, the less confident were less likely to feel that information was widely available, or that they felt well informed about communications. They were more likely to be worried about possible security breaches, and to feel that their growth had been impacted by lack of communications.

![Figure 126: General attitudes to communication technology/services: % agreeing](chart)

Source: QF1. Next, I’m going to read you a number of statements that people have made about their personal attitude towards communications technology and services. For each one, please can you tell me how much you agree or disagree with it?

Base: disagree/ agree that “I don’t have confidence in my ability to identify which new communications products or services would be valuable for the organisation” – more confident (n=824), less confident (n=518).
10.2. Satisfaction with services

Figure 127 shows that the more confident businesses had somewhat higher levels of satisfaction with almost all the specific aspects of landline, internet and mobile services.

In particular, the more confident businesses were more satisfied with the quality of customer service provided by landline and mobile providers, the terms and conditions across all three services, the value for money of fixed landline services and mobile coverage/reliability.

Figure 127: Satisfaction with specific aspects of service: % satisfied

<table>
<thead>
<tr>
<th>Aspect</th>
<th>PSTN Landline</th>
<th>Internet</th>
<th>Mobile phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Geographic coverage/availability</td>
<td>89% 92%</td>
<td>74% 76%</td>
<td>69% 77%</td>
</tr>
<tr>
<td>Reliability of signal/connection</td>
<td>59% 68%</td>
<td>61% 63%</td>
<td>59% 59%</td>
</tr>
<tr>
<td>Terms and conditions</td>
<td>59% 76%</td>
<td>59% 57%</td>
<td>55% 68%</td>
</tr>
<tr>
<td>Value for money</td>
<td>59% 78%</td>
<td>61% 67%</td>
<td>59% 67%</td>
</tr>
<tr>
<td>Ease of contacting CS dept</td>
<td>49% 48%</td>
<td>46% 41%</td>
<td>45% 42%</td>
</tr>
<tr>
<td>Repair time for connection faults</td>
<td>67% 79%</td>
<td>63% 63%</td>
<td>61% 73%</td>
</tr>
<tr>
<td>Quality of service provided by CS</td>
<td>67% 79%</td>
<td>63% 63%</td>
<td>61% 73%</td>
</tr>
<tr>
<td>Reliability for emailing/internet</td>
<td>67% 79%</td>
<td>63% 63%</td>
<td>61% 73%</td>
</tr>
<tr>
<td>Connection speed</td>
<td>67% 79%</td>
<td>63% 63%</td>
<td>61% 73%</td>
</tr>
<tr>
<td>Ability to access speed paid for</td>
<td>67% 79%</td>
<td>63% 63%</td>
<td>61% 73%</td>
</tr>
<tr>
<td>Geographic availability of</td>
<td>67% 79%</td>
<td>63% 63%</td>
<td>61% 73%</td>
</tr>
<tr>
<td>symmetrical services</td>
<td>67% 79%</td>
<td>63% 63%</td>
<td>61% 73%</td>
</tr>
</tbody>
</table>

Source: QB19/QB34/QB2. I am now going to read out some different aspects of the service experience. For each one, please can you tell me how satisfied or dissatisfied you are with this area of your organisation’s landline/ internet/ mobile phone service. Base: disagree/ agree that “I don't have confidence in my ability to identify which new communications products or services would be valuable for the organisation”.

Bases vary by type of service (landline, internet, mobile) and whether statement asked of total sample or sub-sample. Includes DK/NA.
10.3. Switching classification

Figure 128 shows that there were few significant differences in switching classification, for each service, in regard to business confidence.

**Figure 128: Switching classification**

<table>
<thead>
<tr>
<th></th>
<th>PSTN Landline</th>
<th>Internet</th>
<th>Mobile phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>More confident</td>
<td>42%</td>
<td>46%</td>
<td>46%</td>
</tr>
<tr>
<td>Less confident</td>
<td>39%</td>
<td>47%</td>
<td>49%</td>
</tr>
<tr>
<td>Past considerers</td>
<td>5%</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Non-recent switchers</td>
<td>5%</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>Considerers</td>
<td>32%</td>
<td>23%</td>
<td>27%</td>
</tr>
<tr>
<td>Switchers</td>
<td>8%</td>
<td>7%</td>
<td>4%</td>
</tr>
<tr>
<td></td>
<td>13%</td>
<td>18%</td>
<td>18%</td>
</tr>
</tbody>
</table>

Source: Switching classification questions
Base: landline/ internet/ mobile users who disagree/agree that "I don't have confidence in my ability to identify which new communications products or services would be valuable for the organization". Base sizes as indicated.
10.4. Attitudes to switching

As in 2014, those with higher levels of confidence in their ability to identify which new communications products or services would be valuable for the organisation were also more positive overall about the choices available to them and the ease of comparing offerings.

Figure 129 shows that the more confident businesses were more likely, in particular, to agree that prices were clear/transparent, and that they understood early termination charges. Less confident businesses were more likely to say it was difficult to compare providers, particularly on price.

Figure 129: Attitudes to switching: % agreeing

Source: QB13, QB30, QB46. Next, I’m going to read you a series of statements that businesses have made about switching landline/internet/mobile phone service providers. For each one please can you tell me how much you agree or disagree with it?

Base: landline/internet/mobile users who disagree/agree that “I don’t have confidence in my ability to identify which new communications products or services would be valuable for the organization”. Bases vary by type of service (landline, internet, mobile) and whether statement asked of total sample or sub-sample. Includes DK/NA.
11. Lack of availability of services

Summary

Based on agreement or disagreement with the statement: “The ability of my business to grow has been impacted by the lack of suitable communications products and services available to me”, respondents were classified as ‘hampered’ or ‘not affected’ by this issue. A summary of the key differences between the two groups follows:

SME characteristics

- There were very few differences in terms of turnover, job title, etc. The ‘hampered’ were slightly more likely to be in the primary sector (28% vs. 21%) and to have a greater number of employees (4.5 vs. 3.7).
- They were more likely to be rural, especially remote rural (42% vs. 18%), more likely to work from home (61% vs. 49%) or to work in sparsely populated areas/travel (73% vs. 55%).
- ‘Hampered’ SMEs felt less informed about communications services (59% vs. 70%), and were less confident about how they viewed the communications market; 56% claimed they didn’t have confidence vs. 35% ‘not affected’.

Services used

- There were no differences between ‘hampered’ and ‘non-hampered’ SMEs in terms of the importance placed on communications services.
- Annual spend on communications services was higher for the ‘hampered’ at £1,715 vs. £1,313, and they used more products and services: internet (93% vs. 87%), smartphones (57% vs. 48%) and more internet applications.
- The ‘hampered’ were more likely to be looking to acquire/upgrade services in the next year (26% vs. 8%) and more likely to say that their business would benefit from services not currently available to them (30% vs. 5%).

Satisfaction

- The ‘hampered’ had lower levels of overall satisfaction with services (e.g. landline: 73% vs 87%, smartphones: 76% vs 91%), and lower levels of satisfaction with almost all specific aspects of landline/internet/mobile services.

Switching

- Among the ‘hampered’ there was a higher prevalence of landline, mobile and internet switchers.
- The ‘hampered’ were more critical of the choice of products and suppliers available, and of the ease of comparing offerings.

Problems with service

- The ‘hampered’ were more likely to have experienced problems with services in the past 12 months (landline: 36% vs. 21%, mobile: 46% vs. 29%, internet: 72% vs. 41%).

Contracts

- The ‘hampered’ were more likely to have a specific business contract for mobile (63% vs. 51%), but not for landline or internet.
- They were less aware of the terms and conditions of their contracts (all with any contract: 71% vs. 79%), had lower awareness of early termination charges and how these are calculated (all with any contract: 44% vs. 57%) and lower satisfaction that their provider was fulfilling its service level agreement (all with any contract: 53% vs. 85%).
11.1. General attitudes to communications technology/services

Figure 130 shows that although they were more likely to agree that communications services were fundamental to their business success, 'hampered' SMEs were far less likely than others to agree that their business needs were well catered for (49% vs. 90%). They were more likely to lack confidence in identifying valuable new communication services (56% vs. 35%) and to be worried about possible security breaches (54% vs. 39%).

Figure 130: General attitudes to communications technology/services: % agreeing

<table>
<thead>
<tr>
<th>Communication services are fundamental</th>
<th>Comms info is widely available</th>
<th>My business needs are well catered for</th>
<th>I'm well informed about comms</th>
<th>Easy to identify providers</th>
<th>I'm aware of the protection regulations</th>
<th>I don't have confidence in identifying valuable new comms</th>
<th>I'm worried about possible security breaches</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hampered: 91%</td>
<td>82%</td>
<td>90%</td>
<td>70%</td>
<td>67%</td>
<td>56%</td>
<td>54%</td>
<td>35%</td>
</tr>
<tr>
<td>Not affected: 80%</td>
<td>60%</td>
<td>49%</td>
<td>59%</td>
<td>45%</td>
<td>35%</td>
<td>35%</td>
<td>35%</td>
</tr>
</tbody>
</table>

Source: QF1. Next, I’m going to read you a number of statements that people have made about their personal attitude towards communications technology and services. For each one please can you tell me how much you agree or disagree with it?

Base: agree/disagree that: “The ability of my business to grow has been impacted by the lack of suitable communications products and services available to me” – hampered (n=238), not affected (n=1142)

11.2. Satisfaction with services

‘Hampered’ SMEs showed lower levels of satisfaction with almost all the specific aspects of their landline/internet/mobile phone service (Figure 131).

The most notable gaps related to geographic coverage/availability and signal reliability of mobile or internet services. Around half the 'hampered' SMEs were satisfied with these elements, compared with around eight in ten of the unhampered group.
Figure 131: Satisfaction with specific aspects of service: % satisfied

<table>
<thead>
<tr>
<th>Aspect</th>
<th>PSTN Landline</th>
<th>Internet</th>
<th>Mobile phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Geographic coverage/availability</td>
<td>79%</td>
<td>47%</td>
<td>53%</td>
</tr>
<tr>
<td>Reliability of signal/connection</td>
<td>71%</td>
<td>48%</td>
<td>57%</td>
</tr>
<tr>
<td>Value for money</td>
<td>65%</td>
<td>56%</td>
<td>65%</td>
</tr>
<tr>
<td>Terms and conditions</td>
<td>77%</td>
<td>46%</td>
<td>69%</td>
</tr>
<tr>
<td>Ease of contacting CS dept</td>
<td>52%</td>
<td>37%</td>
<td>33%</td>
</tr>
<tr>
<td>Repair time for connection faults</td>
<td>64%</td>
<td>57%</td>
<td>54%</td>
</tr>
<tr>
<td>Quality of CS</td>
<td>74%</td>
<td>64%</td>
<td>72%</td>
</tr>
<tr>
<td>Reliability for emailing/internet</td>
<td>64%</td>
<td>61%</td>
<td>61%</td>
</tr>
<tr>
<td>Ability to access speed paid for</td>
<td>33%</td>
<td>61%</td>
<td>84%</td>
</tr>
<tr>
<td>Connection speed</td>
<td>40%</td>
<td>65%</td>
<td></td>
</tr>
<tr>
<td>Geographic availability of symmetrical services</td>
<td>35%</td>
<td>57%</td>
<td></td>
</tr>
</tbody>
</table>

Source: QB19, B34, B2. I am now going to read out some different aspects of the service experience. For each one, please can you tell me how satisfied or dissatisfied you are with this area of your organisation’s landline/ internet/ mobile phone service. Base: landline/ internet/ mobile users who agree/disagree that “The ability of my business to grow has been impacted by the lack of suitable communications products and services available to me”. Bases vary by type of service (landline, internet, mobile) and whether statement asked of total sample or subsample. Includes DK/NA. *CAUTION. There are some low base sizes (more than n=50 but fewer than n=99) among the ‘hampered’ group for certain statements.
11.3. Switching classification

Figure 132 shows that there was a higher prevalence of landline and internet switchers among the ‘hampered’ group, as was the case in 2014.

**Figure 132: Switching classification**

<table>
<thead>
<tr>
<th></th>
<th>PSTN Landline</th>
<th>Internet</th>
<th>Mobile phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non-switchers</td>
<td>33%</td>
<td>41%</td>
<td>42%</td>
</tr>
<tr>
<td>Past considerers</td>
<td>5%</td>
<td>7%</td>
<td>12%</td>
</tr>
<tr>
<td>Non-recent switchers</td>
<td>31%</td>
<td>18%</td>
<td>6%</td>
</tr>
<tr>
<td>Considerers</td>
<td>8%</td>
<td>10%</td>
<td>26%</td>
</tr>
<tr>
<td>Switchers</td>
<td>23%</td>
<td>25%</td>
<td>19%</td>
</tr>
</tbody>
</table>

Source: Switching classification questions. Base: landline/ internet/ mobile users who agree/disagree that “The ability of my business to grow has been impacted by the lack of suitable communications products and services available to me”. Base sizes as indicated.
11.4. Attitudes to switching

Figure 133 shows that the ‘hampered’ SMEs were more critical of the choices of products and services available within landline, internet and mobile. They were also more likely to agree that it is difficult to compare landline suppliers, and to disagree that they felt able to negotiate effectively on prices and tariffs.

Figure 133: Attitudes to switching (% agreeing)

Source: QB13, QB30, QB46. Next, I’m going to read you a series of statements that businesses have made about switching landline/ internet/ mobile phone service providers. For each one please can you tell me how much you agree or disagree with it?

Base: landline/ internet/ mobile users who agree/disagree that “The ability of my business to grow has been impacted by the lack of suitable communications products and services available to me”. Bases vary by type of service (landline, internet, mobile) and whether statement asked of total sample or sub-sample. Includes DK/NA. *CAUTION. There are some low base sizes (more than n=50 but fewer than n=99) among the ‘hampered’ group for certain statements.
12. Focus on remote and ‘on-the-move’ SMEs

Summary

Remote or ‘on the move’ SMEs represented 58% of the research sample. These SMEs worked in sparsely populated areas and/or worked while travelling in the UK. A summary of the key differences between the two groups follows:

SME characteristics
- There were very few differences in terms of turnover, number of employees, job title etc. ‘Remote/on-the-move’ were more likely to:
  - Have customers located outside their local area (69% vs. 43%)
  - Have mainly business customers (30% vs. 11%)
  - Be primary industry (28% vs. 14%) and less Retail (24% vs. 39%)
  - Be in rural locations (50% vs. 27%), and especially remote rural (28% vs 12%)
  - Work from a home office (49% vs. 21%)
  - Be not mainly/entirely office based (60% vs. 26%)
- General attitudes to the communications market were not consistently different.

Services used
- ‘Remote/ on-the-move’ SMEs had higher total average annual communications spend (£1,550 vs. £1,131), higher usage of mobiles (76% vs. 48%) and internet (94% vs. 79%), and lower use of landlines (95% vs. 98%).
- They placed more importance on mobiles (79% vs. 68%) and internet (84% vs. 75%), and had slightly higher use of most internet applications (e.g. VoIP; 23% vs. 10%, cloud services; 33% vs. 23%).

Satisfaction
- ‘Remote/ on the move’ SMEs had slightly lower levels of overall satisfaction with internet services (63% vs 77%) and somewhat lower levels of satisfaction with geographic coverage and reliability of signal/ connection across landline/ internet/ mobiles.

Switching
- There were few differences in switching classifications for landline/ internet/ mobiles, although internet switchers were slightly more prevalent among the ‘remote/ on-the-move’ group. There were some differences in attitudes to switching, especially their being less likely to believe there was a good choice of products/services.

Problems with service
- ‘Remote/ on-the-move’ were more likely to have experienced problems in the past 12 months (landline: 26% vs. 21%, internet: 54% vs. 37%, mobiles: 35% vs. 25%).

Contracts
- ‘Remote/ on-the-move’ were less likely to have a business-specific contract for landline and internet (landline: 66% vs. 75%, internet: 64% vs. 71%, mobiles: 55% vs. 49%). There were no notable differences in awareness of contract terms and conditions, ETCs or SLAs.
12.1. General attitudes to communications technology/services

Figure 134 shows that remote/on-the-move SMEs were more likely than others to say that communication services were fundamental to their business (84% vs. 76%) and also to agree that their growth had been impacted by lack of communications services (18% vs. 9%).

They were less likely to agree that their business needs were well catered for (78% vs. 88%) and that information on communications services was widely available (72% vs. 82%).

Source: QF1. Next, I’m going to read you a number of statements that people have made about their personal attitudes towards communications technology and services. For each one, please can you tell me how much you agree or disagree with it?

Base: Work while travelling in the UK/ work in sparsely populated areas in the countryside (n=839) vs. those who don’t (n=662).
12.3. Satisfaction with services

Figure 135 shows that remote/on-the-move SMEs had somewhat lower satisfaction levels with almost all the specific aspects of landline, internet and mobile services, most notably geographic coverage/availability and signal reliability for mobile or internet.

For the internet in particular, remote/on-the-move SMEs were less satisfied with their ability to access the speeds they had paid for, connection speeds and availability of symmetrical services.

Source: QB19, B34, B2. I am now going to read out some different aspects of the service experience. For each one, please can you tell me how satisfied or dissatisfied you are with this area of your organisation’s landline/internet/mobile phone service. Base: landline/internet/mobile users who work while travelling in the UK/work in sparsely populated areas in the countryside vs. those who don’t. Includes DK/NA. Bases vary by type of service (landline, internet, mobile) and whether statement asked of total sample or sub-sample.
12.4. Switching classification

Figure 136 shows that there were few marked differences between ‘remote/on-the-move’ SMEs compared with others in terms of switching classification. However, non-switchers of internet services were less prevalent among this group than among those who did not work in this way.

**Figure 136: Switching classification**

<table>
<thead>
<tr>
<th></th>
<th>PSTN Landline</th>
<th>Internet</th>
<th>Mobile phone</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Remote/On the move (496)</td>
<td>Others (453)</td>
<td>Remote/On the move (790)</td>
</tr>
<tr>
<td>Non-switchers</td>
<td>40%</td>
<td>7%</td>
<td>46%</td>
</tr>
<tr>
<td>Past considerers</td>
<td>43%</td>
<td>3%</td>
<td>49%</td>
</tr>
<tr>
<td>Non-recent switchers</td>
<td>7%</td>
<td>3%</td>
<td>8%</td>
</tr>
<tr>
<td>Considerers</td>
<td>31%</td>
<td>34%</td>
<td>28%</td>
</tr>
<tr>
<td>Switchers</td>
<td>16%</td>
<td>15%</td>
<td>15%</td>
</tr>
</tbody>
</table>

Source: Switching classification questions.
Base: landline/ internet/ mobile users who work while travelling in the UK/ work in sparsely populated areas in the countryside vs. those who don’t. Bases as indicated.
12.5. Attitudes to switching

There were very few differences in attitudes to switching services between ‘remote/on-the-go’ SMEs and others with regard to mobile phone services (Figure 137).

‘Remote/on-the-go’ SMEs were less likely to agree that there was a good choice of products/services for landline or internet, or to feel able to negotiate effectively on prices and tariffs for these products.

For landline in particular, ‘remote/on-the-go’ SMEs were more likely to say it was difficult to compare network quality, customer service or price.

**Figure 137: Attitudes to switching (% agreeing)**

<table>
<thead>
<tr>
<th>Statement</th>
<th>PSTN Landline</th>
<th>Internet</th>
<th>Mobile phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aware I can port my number</td>
<td>85%</td>
<td>67%</td>
<td>92%</td>
</tr>
<tr>
<td>Good choice of products/services</td>
<td>67%</td>
<td>49%</td>
<td>77%</td>
</tr>
<tr>
<td>Prices are clear/transparent</td>
<td>44%</td>
<td>49%</td>
<td>77%</td>
</tr>
<tr>
<td>Not much difference between suppliers</td>
<td>45%</td>
<td>53%</td>
<td>53%</td>
</tr>
<tr>
<td>Difficult to compare on network quality</td>
<td>45%</td>
<td>54%</td>
<td>37%</td>
</tr>
<tr>
<td>Difficult to compare on CS</td>
<td>45%</td>
<td>54%</td>
<td>46%</td>
</tr>
<tr>
<td>Difficult to compare on price</td>
<td>45%</td>
<td>54%</td>
<td>64%</td>
</tr>
<tr>
<td>Understand early termination charge</td>
<td>51%</td>
<td>55%</td>
<td>66%</td>
</tr>
<tr>
<td>Not enough choice of suppliers</td>
<td>17%</td>
<td>22%</td>
<td>10%</td>
</tr>
<tr>
<td>Difficult to compare as needs are complex</td>
<td>17%</td>
<td>22%</td>
<td>10%</td>
</tr>
<tr>
<td>Can negotiate on prices and tariffs</td>
<td>47%</td>
<td>53%</td>
<td>19%</td>
</tr>
<tr>
<td>Difficult to compare different tariffs</td>
<td>45%</td>
<td>58%</td>
<td>19%</td>
</tr>
</tbody>
</table>

Source: QB13, B30, B46. Next, I’m going to read you a series of statements that businesses have made about switching landline, internet, mobile phone service providers. For each one, please can you tell me how much you agree or disagree with it? Base: landline, internet, mobile users who work while travelling in the UK, work in sparsely populated areas in the countryside vs. those who don’t. Bases vary by type of service (landline, internet, mobile) and whether statement asked of total sample or sub-sample. Includes DK/NA.
13. Focus on contract type

Summary

A summary of key differences between those on business and on personal contracts:

SME characteristics
- There was a high incidence of business-specific contracts for landline (70%) and internet services (67%), less so for mobile phones (53%). Incidence increased significantly among larger businesses e.g. among those with 50-249 employees: 95% for landline, 94% for internet and 92% for mobile phone services.
- There were some differences in overall attitudes to the communications market (e.g. mobile and internet business contract users were more likely to state that communications were fundamental to their business or that they found it easier to identify potential providers).

Services used
- Those on business contracts tended to have higher total annual communications spend (landline - £1,244 vs. £838, internet - £1,765 vs. £926, mobile - £1,976 vs. £1,077).
- They had higher use of some communications products/services (e.g. ISDN 2/2e use: 4% among landline business contract holders, 1% among personal) and used a wider range of internet applications.

Satisfaction
- There were no significant differences in overall satisfaction with landline, internet or mobile, and very few significant differences in satisfaction with specific aspects of landline/ internet/ mobile services. Those with personal contracts were more likely to give a better value for money score for landline and mobile; those with business contracts gave a better repair time score for mobiles.

Switching
- Business contract users were slightly more likely to switch their landline/internet/mobiles. There were some differences in attitudes to switching; e.g. more able to negotiate on tariffs/services and less likely to see few differences between suppliers (esp. for mobiles; 45% vs. 61%).

Problems with service
- There was no significant variation in incidence of service problems in the past 12 months for business vs. private contract holders (landline: 26% vs. 19%, internet: 47% vs. 48%, mobiles: 32% vs. 33%).

Contracts
- Awareness of key terms and conditions was slightly higher for business contract users, across landline, internet and mobiles.
- There was higher awareness of early termination charges among those with a business contract (landline: 56% vs. 48%, internet: 57% vs. 50%, mobiles: 59% vs. 50%), but no significant variation in relation to SLA satisfaction.
13.1. General attitudes to communications technology/services

Figure 138 shows that there were few major attitudinal differences by the type of contract held.

**Figure 138: General attitudes to communications technology/services: % agreeing**

- **PSTN Landline**
  - Business needs are well catered for: 86% vs. 79%
  - Comms services are fundamental: 79% vs. 75%
  - Comms info is widely available: 66% vs. 63%
  - I’m well informed about comms: 66% vs. 62%
  - Easy to identify potential providers: 55% vs. 48%
  - Aware of protection regulations: 39% vs. 49%
  - Worried about possible security breaches: 41% vs. 41%
  - Don’t have confidence in identifying valuable new comms: 13% vs. 16%
  - Growth been impacted by lack of comms: 65% vs. 71%

- **Internet**
  - Business needs are well catered for: 85% vs. 80%
  - Comms services are fundamental: 80% vs. 71%
  - Comms info is widely available: 71% vs. 67%
  - I’m well informed about comms: 67% vs. 57%
  - Easy to identify potential providers: 51% vs. 48%
  - Aware of protection regulations: 48% vs. 43%
  - Worried about possible security breaches: 34% vs. 37%
  - Don’t have confidence in identifying valuable new comms: 37% vs. 37%
  - Growth been impacted by lack of comms: 37% vs. 14%

- **Mobile phone**
  - Business needs are well catered for: 77% vs. 84%
  - Comms services are fundamental: 80% vs. 80%
  - Comms info is widely available: 78% vs. 73%
  - I’m well informed about comms: 73% vs. 66%
  - Easy to identify potential providers: 53% vs. 53%
  - Aware of protection regulations: 53% vs. 55%
  - Worried about possible security breaches: 43% vs. 44%
  - Don’t have confidence in identifying valuable new comms: 37% vs. 37%
  - Growth been impacted by lack of comms: 37% vs. 17%

Source: QF1. Next, I’m going to read you a number of statements that people have made about their personal attitude towards communications technology and services. For each one, please can you tell me how much you agree or disagree with it?

Base: landline/ internet/ mobile business contract holders (n=759/1116/713) vs. private contract holders (n=200/234/268).
13.3. Satisfaction with services

Looking at satisfaction with specific aspects of service, Figure 139 shows that those with business contracts for internet or mobile services were more satisfied with the quality of customer service (and for mobile, also with the ease of contacting customer services). There was no such gap with regard to landline services.

Those with business contracts for mobile also had somewhat higher levels of satisfaction with signal reliability/connection (78% satisfied vs. 70%).

Figure 139 Satisfaction with specific aspects of service (% satisfied)

Source: QB19, B34, B2. I am now going to read out some different aspects of the service experience. For each one, please can you tell me how satisfied or dissatisfied you are with this area of your organisation’s landline/internet/mobile phone service.

13.4. Switching classification

Figure 140 shows a slightly higher proportion of switchers vs. non-switchers among SMEs with business contracts, for each of the communications services.

**Figure 140: Switching classification**

<table>
<thead>
<tr>
<th></th>
<th>PSTN Landline</th>
<th>Internet</th>
<th>Mobile phone</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Non-switchers</strong></td>
<td>38%</td>
<td>44%</td>
<td>44%</td>
</tr>
<tr>
<td><strong>Past considerers</strong></td>
<td>5%</td>
<td>6%</td>
<td>7%</td>
</tr>
<tr>
<td><strong>Non-recent switchers</strong></td>
<td>33%</td>
<td>23%</td>
<td>27%</td>
</tr>
<tr>
<td><strong>Considerers</strong></td>
<td>7%</td>
<td>7%</td>
<td>4%</td>
</tr>
<tr>
<td><strong>Switchers</strong></td>
<td>17%</td>
<td>20%</td>
<td>19%</td>
</tr>
</tbody>
</table>

Source: Switching classification questions. Base: landline/ internet/ mobile business contract holders (n=735/1083/696) vs. private contract holders (n=195/229/261).
13.5. Attitudes to switching

There were very few major differences in attitudes to switching services by whether a SME had a business contract or not (Figure 141).

Those with business contracts for mobile services were more likely to agree there was not much difference between suppliers (61% vs. 45%). Those with business contracts for landline or internet were somewhat more likely to agree that it was difficult to make price comparisons.

Figure 141: Attitudes to switching (% agreeing)

Source: QB13/B30/B46. Next, I'm going to read you a series of statements that businesses have made about switching landline/ internet/ mobile phone service providers. For each one, please can you tell me how much you agree or disagree with it?

14. Focus on IT specialists

Summary

A summary of the key differences between IT specialists and the total sample of SME respondents:

**SME characteristics**
- There was a low incidence of IT specialists among the total sample (at 1%). Incidence increased significantly among larger businesses (22% in companies with 50-99 employees, 39% in companies with 100-249 employees).
- As IT specialists are more prevalent in larger businesses, these tend to have higher turnover and a wider geographic spread of customers.
- IT specialists were in stronger agreement in relation to the overall attitudes to communications market (e.g. “I feel very well informed about how communications services can help the organisation survive and grow”: 94% vs. 66%; “the needs of my business are well catered for in the communications market” 93% vs. 82%; and “it is easy to identify which providers my business can potentially use” 85% vs. 64%).

**Services used**
- IT specialists had a higher total annual communications spend (£4,974 vs. £1,371), and higher use of most communications products/services, especially lower-incidence services (e.g. ISDN 30: 30% vs. 3%, dedicated internet: 22% vs. 5%, managed VoIP: 14% vs. 3%, leased lines: 13% vs. 2%).
- There was a wider range of internet applications used by IT specialists (e.g. online data storage or backup: 49% vs. 33%, FTP: 47% vs. 19%, cloud services: 37% vs. 29%).

**Satisfaction**
- IT specialists tended to be more satisfied than average with the specific aspects of internet services (with the exception of repair times) and mobile (with the exception of terms and conditions, and quality of service)
- Overall satisfaction levels were higher across the three services (internet: 79% vs. 69%, PSTN landline: 95% vs. 83%, mobiles: 95% vs. 90%).

**Switching**
- IT specialists were less likely to be internet switchers for internet, more likely to be mobile switchers. They were more likely to feel they could negotiate on price, and to think it was difficult to compare different tariffs.

**Problems with service**
- There was a mixed picture in contrast to the total sample in problems experiences in the past year; (landline: 30% vs. 24%, internet: 31% vs. 47%, mobiles: 53% vs. 32%).

**Contracts**
- IT specialists were more likely to have business-specific contracts for internet and mobiles (internet: 75% vs. 67%, mobiles: 95% vs. 53%).
14.1. General attitudes to communications technology/services

IT specialists had a different attitudinal profile to the average SME representative (Figure 142). They were better informed, more confident about identifying providers, more confident that their business needs were catered for, and more aware of the protection offered by regulations.

Two-thirds (65%) of IT specialists agreed that they were worried about possible security breaches (vs. 42% overall).

Figure 142: General attitudes to communications technology/services: % agreeing

Source: QF1. I’m going to read you a number of statements that people have made about their personal attitude towards communications technology and services. For each one, please can you tell me how much you agree or disagree with it? Base: total sample (n=1501), IT specialists (n=115).
14.3. Switching classification

Figure 143 shows a slightly higher proportion of internet non-switchers among IT specialists. For mobile phone services, there was a higher proportion of switchers among IT specialists (27% vs. 17% in the total sample).

The sample size was too low to show differences for landline services.

Source: Switching classification questions. Base: IT specialists/total sample (bases as shown).
Appendices

A. Questionnaire
BRIEFING NOTE TO INTERVIEWERS ON DESIRED RESPONDENT:

We are keen to speak to the person in the organisation who has primary decision-making responsibility in relation to purchasing communications services (including landline, mobile and internet services - both email and www) and also has at least some influence in strategic decisions relating to these services, including any major investment decisions. In larger companies that have an IT function, we expect this person to be the most senior in that department, the IT Director or equivalent. In smaller companies where there is no dedicated IT function, we would expect to talk to the Owner or Managing Director in most instances.

We do not want to talk to the person that simply signs off budgets. We want to speak to the person who is either solely or jointly responsible for deciding which providers and products to buy on behalf of the organisation.

We do not want to talk to an administrator. The only exception to this might be where we are collecting usage data about spend and the senior decision-maker doesn’t have this factual information to hand. We would be very happy to start the interview with the senior decision-maker and be referred to more junior personnel in order to collect this type of data.

In cases where there is a parent company and separate sub divisions/brands where autonomous decisions are made, we want to talk to the company making the majority of the decisions. Therefore if the parent company only sets the broad policy and individual sub brands are fairly autonomous in terms of implementation and decision making we want to treat each sub brand as a separate company/interview in the research. However, where the parent company largely dictates decision making, they should be treated as the ‘major interview’ and then the sub companies can be used to ‘fill in gaps’ in much the same way as we would do with individuals within any one company.

In public sector organisations, the primary level of interest would be Local Authorities, PCTs and central Government, rather than individual schools and hospitals for example. In some cases, a third party will have procurement responsibilities across multiple sites but we don’t want to speak to them. In this case we want to speak to managers inside the organisation who can talk about the service experience from a user point of view.

IF IN DOUBT, PLEASE CHECK WITH YOUR JIGSAW PROJECT MANAGERS
AT RECEPTION:

Please could I speak to the person within the organisation who has primary responsibility (sole or joint) for telecoms, IT and other communications services? If you have a dedicated IT Manager or Director, please could I speak to them?

INTRODUCTION:

Good morning/afternoon, my name is __________ from Jigsaw Research. I am calling on behalf of Ofcom, the regulator for communications industries in the UK.

Ofcom has asked us to conduct a research project to better understand how businesses are using communications services, in other words landlines, mobile phones and the internet - including email, the web and related services. The research will help Ofcom identify areas where there is a need for further advice, information or support. We would appreciate some of your time to contribute to this important study.

YES, CONTINUE WITH SCREENER. IF REFUSED, THANK AND CLOSE

IF NECESSARY ADD:

We would like to reassure you that your answers will be held in the strictest confidence. Your open and honest views are enormously important in helping Ofcom to understand the challenges that businesses face when making decisions about communications services and the sort of advice, information or support that might make this easier.

The interview will take around 20-30 minutes depending on your responses.

If it is more convenient we are happy to call back at another time.

We would like to reassure you that this is a genuine piece of market research. No-one will try to sell you anything as a direct result of this research and the project is not designed to test your knowledge but to gauge your opinions and understand how you make decisions.

We got your company name and telephone number from a standard list provider, a commercial database of businesses in the UK. We are interested in speaking to people responsible for IT and telecoms across a wide range of businesses.

If you would like to check our credentials, you can call the Market Research Society, free of charge, on 0500 39 69 99.

If you would like to verify that this is a legitimate piece of research commissioned by Ofcom we can also email or fax you a letter that Ofcom has written for this purpose.
ASK ALL

This study requires us to interview a broad range of UK businesses so the first few questions about your organisation are purely to ensure that we include a true cross-section of industry.

S1. First of all, which of the following best describes the sector in which you operate?
   SINGLE CODE
   Private sector ......................................................... 1
   Public sector, including central, regional and local government ....... 2
   Third sector, including charities, NGOs, quangos, not for profits etc. 3

S2a. Which of the following best describes how much control your organisation has when it comes to making purchasing decisions in relation to communications services? This would include decisions about your landline, mobile phone and internet services (including both email and web access), as well as relevant support services.
   READ OUT. SINGLE CODE
   We hold our own budget and can decide how to use it ........... 1  CONTINUE
   We have an input but not a complete say ........................... 2  CONTINUE
   We only implement decisions that are made elsewhere (parent company, PCT or Head Office) ................................. 3
   IF PUBLIC SECTOR (code 2 at S1) CONTINUE
   IF PRIVATE/VOLUNTARY SECTOR ASK TO BE REFERRED AND GO BACK TO INTRODUCTION

S2b. And which of the following best describes the responsibility you personally have for making purchasing decisions in relation to these communications services for the organisation?
   READ OUT. SINGLE CODE
   I am solely responsible ........................................... 1  SKIP TO S3
   I am jointly responsible with somebody else .. 2  SKIP TO S3
   Someone else has primary responsibility .......... 3
   IF PUBLIC SECTOR (code 2 at S1) CONTINUE
   IF PRIVATE/VOLUNTARY SECTOR ASK TO BE REFERRED AND GO BACK TO INTRODUCTION

ASK S2c IF CODE 3 AT S2b

S2c. In that case can I just double check - do you have managerial responsibilities, and can you comment in detail on your organisation’s experiences using communications providers and services? SINGLE CODE
   Yes .............................................................................  CONTINUE
   No ........................................................................ ASK TO BE REFERRED AND GO BACK TO INTRODUCTION
ASK ALL

S3. Could I please confirm your exact job title? SINGLE CODE

Owner / Proprietor ................................................................. 1
Partner / Managing Partner ..................................................... 2
Chief Executive Officer ........................................................... 3
Chief Finance Director / Finance Director ................................. 4
Chief Operations Director / Operations Director ....................... 5
Managing Director .................................................................... 6
IT/Telecoms Director / Manager or other ITC specialist ............ 7
Other senior manager ................................................................. 8
PA / Office manager ................................................................ 9
Other (WRITE IN) .................................................................... 10

S4a. SECTOR TO BE AUTOMATICALLY PUNCHED FROM SIC CODE IN SAMPLE

Agriculture, Forestry, & Fishing (01 to 03) 
Mining and Quarrying (05 to 09) 
Manufacturing (10 to 33) 
Electricity, gas, steam & Air conditioning supply (35) 
Water Supply, sewerage, waste management (36 to 39) 
Construction (41 to 43) 
Wholesale & Retail Trade repair of motor vehicles and motorcycles (45 to 47) 
Transportation and storage (49 to 53) 
Accommodation and food service activities (55 to 56) 
Information and communication (58 to 63) 
Financial and insurance activities (64 to 66) 
Real estate activities (68) 
Professional, scientific and technical activities (69 to 75) 
Administrative and support service activities (77 to 82) 
Public administration and defence compulsory social security (84) 
Education (85) 
Human health and social work activities (86 - 88) 
Arts, entertainment and recreation (90 to 93) 
Other service activities (94 to 96)

SIC_GROUP
Primary
Retail / Wholesale
Services
Government (including central, local, education and health)

S4B. Is your organisation a network or service provider, reseller of telecoms or IT?
Yes.................................CLOSE
No.................................Continue

IF PUBLIC SECTOR (code 2 at S1) ASK S4c. OTHERS SKIP TO S5a.
S4c. Which of the following best describes where you work (READ OUT, SINGLE CODE)?

Central Government ........................................... 1
Regional Government .......................................... 2
Local Government .............................................. 3
None of these ................................................... 4

ASK ALL
S5a. Including yourself, how many people does your organisation currently employ in the UK
either full or part time? WRITE IN. ALLOW DON’T KNOW

ASK S5B IF DON’T KNOW AT S5A. OTHERS SKIP TO S6
S5b. Which of the following size bands does your organisation fall into? SINGLE CODE

1, work on your own/no employees ......................... 1
2, you plus one partner or employee ..................... 2
3-4 .................................................................. 3
5-9 .................................................................. 4
10-19 .................................................................. 5
20-49 .................................................................. 6
50-99 .................................................................. 7
100-249........................................................... 8
Don’t know ..................................................... 13

IF STILL DON’T KNOW AT S5b, TAKE FROM SAMPLE

ASK ALL
S6. How many sites or offices does your organisation operate from in the UK, including this one?
SINGLE CODE

1 ................................................................. 1
2 ................................................................. 2
3 ................................................................. 3
4 ................................................................. 4
5-9 .............................................................. 5
10-49 ........................................................ 6
50 or more .................................................. 7
Don’t know ............................................... 8
Refused ..................................................... 9
S7. Which of the following best describes your set up? SINGLE CODE

- Home office ......................................................... 1
- Office or desk space in a managed/serviced office ........ 2
- Self-contained office / commercial premises
  (e.g. retail premises, shops, workshops, units) ............... 3
- Don’t have an office ............................................... 4
- Other (please specify) ............................................. 5

S8. Can I just confirm that the postcode at this location is ______? READ OUT POSTCODE FROM SAMPLE. SINGLE CODE

- Yes ................................................................  1
- No ................................................................. 2

RECORD POSTCODE FOR LOCATION/SITE WHERE RESPONDENT IS BASED

S9. REGION TO BE AUTOMATICALLY PUNCHED:

- North East ....................................................... 1
- North West ...................................................... 2
- Yorkshire and the Humber .................................... 3
- East Midlands ................................................... 4
- West Midlands .................................................... 5
- East of England ............................................... 6
- South East ....................................................... 7
- South West ...................................................... 8
- London ........................................................... 9
- Wales ................................................................ 10
- Scotland ........................................................ 11
- Northern Ireland ............................................... 12

SEE QUOTA

S10. URBANITY

- Large City ........................................................ 1
- Smaller city / large town ..................................... 2
- Medium town ................................................... 3
- Small town within 10 miles of a large settlement ....... 4
- Small town further than 10 miles from a large settlement5
- Rural area within 10 miles of a large settlement ........ 6
- Rural area further than 10 miles of a large settlement... 7

1,2,3,4,5 = Urban
6= Rural
7= Remote rural

NOTE TO SCRIPTER: PLEASE CODE ALL GROUPS AS WE MAY WANT TO SPLIT OUT 1 AND 2 TOGETHER AND 3, 4 AND 5 TOGETHER DURING FURTHER ANALYSIS
SECTION A: SERVICES USED

ASK ALL

QA1a  Which of the following does your organisation use for business purposes? [multicode]

1) Standard phone (PSTN) IF NECESSARY - PSTN stands for Public Switched Telephone Network - basically the normal phone network or landline
2) ISDN 2 / 2e IF NECESSARY: This is a form of ISDN line offering you connection for up to 8 digital devices and allowing you to make two calls (or a voice call and data call) at the same time
3) ISDN 30 IF NECESSARY - This is a form of ISDN line offering you 8 to 30 independent connections and allowing you to multiple calls at the same time
4) Managed VoIP (sometimes called SIP trunking) which uses a data connection for high-quality voice calls. Normally there is a monthly cost for this service and often calls are made and received in a similar way to traditional fixed-line voice calls using desktop phones and phone numbers.
5) Other VoIP e.g. using an unmanaged OTT service such as Skype or FaceTime. Often you will use an app or website to access these services and use user names rather than dial a phone number. These often require no monthly subscription but there is no guarantee of call quality
6) Smartphone e.g. iPhone, Samsung Galaxy, Blackberry etc.
7) Standard mobile phones i.e. a mobile phone that is not a smartphone
8) Leased line or private circuit that is used for services OTHER THAN a dedicated internet connection (any dedicated connectivity for any purpose such as point to point data communications. These may be analogue, traditional or Ethernet products)
9) Video conferencing
10) Advanced voice services (Example of this type of products include Centrex, FeatureLine, or a ‘hosted PBX’) - this is a type of hosted voice service which provides additional features such as call waiting, call diversion, voicemail, hunt group numbers and/or extensions

QA1b  Which of the following methods does your company use to connect to the internet?

1) Fixed-line broadband - this is a service like those taken by residential consumers where the speed is described as “up to” and where the service is shared with other users, meaning that the speeds delivered to your premises will vary according to how many other customers in your local area are using the internet. The cost per month is usually £80 or less for one broadband connection
2) Dedicated internet access - this is a service such as an Ethernet leased line internet access product which gives your premises its own uncontended internet connection meaning that the speeds to your premises are guaranteed and not affected by other customers. The cost per month is typically at least £100 and often much more.
3) Mobile broadband delivered by a cellular network - this is a service delivered by 3G or 4G technology either directly to a smartphone or device with an embedded SIM card, or to a ‘dongle’ which is plugged into the USB slot on a computer. Mobile
broadband can also be used by ‘tethering’ a phone to a PC, or by using services such as MiFi

IF USE ‘SMARTPHONE’ (CODE 6 AT QA1A) AND DO NOT USE ‘MOBILE BROADBAND DELIVERED BY A CELLULAR NETWORK’ (CODE 3 AT QA1B) ASK:

Can I double check, do you use your smartphone(s) to access the internet or to send and receive emails?

IF YES, SELECT CODE 3 AT QA1B

4) Fixed-wireless broadband - this is a service which delivers a broadband service over a wireless connection. It is different from a mobile, as the service is fixed to a single location and may sometimes use an external aerial attached to your premises
5) Dial-up - this is when you access the internet via a phone call or via ISDN, in contrast to a broadband service
6) Satellite broadband service - An option available for those who live in rural areas where traditional fixed-line based broadband services aren’t available. It uses a satellite dish to provide two-way access to broadband services, with download speeds of up to about 20 Mbps available
7) None of these

ASK ALL WITH FIXED-LINE BROADBAND (CODE 1 AT QA1B):

QA2a Which of the following fixed broadband do you receive?
   1) Copper/standard broadband (ADSL or SDSL)
   2) Cable [nearly always provided by Virgin Media, provided by WightCable in the Isle of Wight]
   3) Fibre/superfast
   4) (Don’t’ know)

ASK ALL WITH DEDICATED INTERNET ACCESS (CODE 2 AT QA1B):

QA2b Which of the following dedicated internet access do you use?
   1) Fibre Ethernet leased line
   2) Ethernet over copper (sometimes called EFM)
   3) Ethernet over fibre to the cabinet / fibre to the premises (sometimes called Ethernet GEA)
   4) Dedicated Ethernet (not sure which type)
   5) With a link directly from our IP VPN (secure provider-managed IP network)
   6) Other type of dedicated internet access / leased line (please specify)
   7) (Don’t know)

ASK ALL WITH MOBILE INTERNET ACCESS (CODE 3 AT QA1B):
QA2c  In which of the following ways do you access mobile broadband?
   1) On a smartphone
   2) Via an enabled device, e.g. a tablet which has a mobile SIM
   3) Via tethering a smartphone to a PC
   4) Via a mobile broadband ‘dongle’ connected to a PC
   5) Via a cellular router such as a ‘MiFi’ unit

SAY:  These are the services we would like you to think about for the rest of the interview. Even if you have personal contracts for these services, we would like you to think about your experience of using them for business purposes only.

Next I’d like to ask you a few questions about the providers you use for your communications services.

ASK FOR ALL CODED AT QA1
QA2d  What is the name of the company that is the main provider of your [coded at QA1] service?
SINGLE CODE
a) Standard PSTN landline *calls (QA1A=1)*
b) Standard PSTN Landline *rental (QA1A=1)*
c) ISDN 2/2e *calls (QA1A=2)*
d) ISDN 2/2e *rental (QA1A=2)*
e) ISDN 30 *calls (QA1A=3)*
f) ISDN 30 *rental (QA1A=3)*
g) Leased lines (any type) or private circuits *rental QA1A=8* USED FOR PURPOSES OTHER THAN DEDICATED INTERNET ACCESS
h) Broadband (Copper/ADSL/SDSL), cable / fibre (superfast) connection (QA1b=1)
i) Dedicated internet access (QA1b=2)

k) Mobile phone service (not the phones themselves) *(CODES 6,7 AT QA1)*

<table>
<thead>
<tr>
<th>Service</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alcatel</td>
<td>1</td>
</tr>
<tr>
<td>Alternative Networks</td>
<td>2</td>
</tr>
<tr>
<td>BT</td>
<td>3</td>
</tr>
<tr>
<td>Cable and Wireless</td>
<td>4</td>
</tr>
<tr>
<td>Carphone Warehouse</td>
<td>5</td>
</tr>
<tr>
<td>Chess</td>
<td>6</td>
</tr>
<tr>
<td>Colt</td>
<td>7</td>
</tr>
<tr>
<td>Claranet</td>
<td>8</td>
</tr>
<tr>
<td>Daisy</td>
<td>9</td>
</tr>
<tr>
<td>Demon</td>
<td>10</td>
</tr>
<tr>
<td>DST (Directsave.com)</td>
<td>11</td>
</tr>
<tr>
<td>Eclipse</td>
<td>12</td>
</tr>
<tr>
<td>Everything Everywhere/EE</td>
<td>13</td>
</tr>
<tr>
<td>Excel</td>
<td>14</td>
</tr>
<tr>
<td>Company</td>
<td>Number</td>
</tr>
<tr>
<td>----------------------------------------</td>
<td>--------</td>
</tr>
<tr>
<td>Gamma</td>
<td>15</td>
</tr>
<tr>
<td>Global Crossing</td>
<td>16</td>
</tr>
<tr>
<td>Homecall</td>
<td>17</td>
</tr>
<tr>
<td>Intechnology</td>
<td>18</td>
</tr>
<tr>
<td>KCom (Kingston Communications)</td>
<td>19</td>
</tr>
<tr>
<td>Janet</td>
<td>20</td>
</tr>
<tr>
<td>One Bill</td>
<td>21</td>
</tr>
<tr>
<td>Opal Communications/Pipex</td>
<td>22</td>
</tr>
<tr>
<td>Orange</td>
<td>23</td>
</tr>
<tr>
<td>O2 / BE</td>
<td>24</td>
</tr>
<tr>
<td>Madasafish</td>
<td>25</td>
</tr>
<tr>
<td>Pipex</td>
<td>26</td>
</tr>
<tr>
<td>Plusnet</td>
<td>27</td>
</tr>
<tr>
<td>Post Office</td>
<td>28</td>
</tr>
<tr>
<td>Primus</td>
<td>29</td>
</tr>
<tr>
<td>Rainbow</td>
<td>59</td>
</tr>
<tr>
<td>Sky / Skytalk</td>
<td>30</td>
</tr>
</tbody>
</table>
ASK QA3 IF MORE THAN ONE SERVICE USED AT QA1A/B

QA3a. Are any of your services bundled together with the same provider?
EXPLAIN IF NECESSARY: BY “BUNDLED” I MEAN ON THE SAME CONTRACT, RATHER THAN ON SEPARATE CONTRACTS BUT PROVIDED BY THE SAME PROVIDER.

Yes ................................................................. 1
No ................................................................. 2

YES AT QA3a

QA3b. How many different providers do you have bundled services with?

Just one ................................................................. 1
More than one ........................................................ 2
(Don’t know) ........................................................ 3

QA3c. And which of these services are supplied as a bundle package?
IF RESPONDENT HAS DIFFERENT BUNDLES AT DIFFERENT SITES, PLEASE RECORD THE SERVICES THEY HAVE IN THEIR LARGEST BUNDLE AT ONE SITE.

SHOW SERVICES USED AT QA1A

<table>
<thead>
<tr>
<th>Service</th>
<th>Provider 1</th>
<th>Provider 2</th>
<th>Provider 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fixed Landline (1/2/3/4/5 @QA1a)</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Mobile phone/Smalphone QA1a = 6 or 7</td>
<td>2</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Broadband/Cable/fibre internet (1@ QA1b)</td>
<td>3</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Mobile broadband (dongle/USB modem) (3 @ QA1b)</td>
<td>4</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Dial up internet (5 @ QA1b)</td>
<td>5</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>Fixed wireless broadband</td>
<td>6</td>
<td>6</td>
<td>6</td>
</tr>
<tr>
<td>Leased lines/private circuits (8 @ QA1a)</td>
<td>7</td>
<td>7</td>
<td>7</td>
</tr>
<tr>
<td>Dedicated internet access (2@ QA1b)</td>
<td>8</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>Satellite broadband (6 @QA1b)</td>
<td>9</td>
<td>9</td>
<td>9</td>
</tr>
<tr>
<td>Don’t know (SINGLE CODE) Don’t read out</td>
<td>10</td>
<td>10</td>
<td>10</td>
</tr>
</tbody>
</table>
QA3d What is the name of the company that provides this bundle?

USE SAME LIST AS QA2d

REPEAT QA3c & QA3d if they have more bundled services at QA3b up to a maximum of three

BUNDLE GROUPING DEFINITIONS FOR ROUTING PURPOSES:
LANDLINE AND INTERNET: CODE 1 AND CODE 3, 4 OR 5 WITH SAME PROVIDER AT QA3C
LANDLINE AND MOBILE: CODE 1 AND CODE 2 WITH SAME PROVIDER AT QA3C
LANDLINE, INTERNET AND MOBILE: CODE 1 AND CODE 2 AND CODE 3, 4 OR 5 WITH SAME PROVIDER AT QA3C
MOBILE AND INTERNET: CODE 2 AND CODE 3, 4, OR 5 WITH SAME PROVIDER AT QA3C

ASK IF HAVE LEASED LINES OR PRIVATE CIRCUITS AND DO NOT HAVE FIBRE BROADBAND (CODE 8 AT QA1a OR CODE 2 AT QA1b BUT NOT CODE 3 AT QA2a)

QA4a Thinking about your leased lines, are you considering switching from using leased lines to using a fibre broadband service instead in the next 12 months?

Yes ................................................... 1
No .................................................... 2
Not sure ............................................. 3

ASK IF HAVE FIBRE BROADBAND AND DO NOT HAVE LEASED LINES OR PRIVATE CIRCUITS (CODE 3 AT QA2a BUT NOT CODE 8 AT QA1a OR CODE 2 AT QA1b)

QA4b Thinking about your fibre / superfast broadband service, did this service replace a leased line service? If yes, was this in the last 12 months or longer ago?

Yes, within last 12 months...................... 1
Yes, longer ago ..................................... 2
No .................................................... 3
Not sure ............................................. 4
ASK QA7 IF HAVE SMARTPHONE SERVICES (CODE 6 AT QA1A)

QA5. Thinking now about the smartphone(s) your organisation uses, which of the following do you or your staff ever use a smartphone for business purposes?

Making and receiving voice calls ........................................ 1
Sending and receiving texts ............................................. 2
Sending and receiving emails ......................................... 3
Taking any payments from customers e.g. using PayPal, Paym ................................................................. 5
Taking credit/debit card payments at the point of sale from customers e.g. iZettle, Payleven ...................... 6
Sending/receiving messages using instant messaging services such as WhatsApp, i-message, BB Messenger, Google Talk .................................. 7
Working out of office hours ............................................. 8
Accessing business documents, systems and applications while away from the office............................ 9
Web browsing .................................................................. 10

ASK IF HAVE FIXED OR MOBILE INTERNET AT QA1b (CODES 1 - 5)

QA6. Which, if any, of the following internet applications does your organisation use for business purposes?
READ OUT. CODE ALL MENTIONED

Accessing the internet ..................................................... 1
Company website ......................................................... 2
Email ............................................................................. 3
Online banking ............................................................ 4
Online advertising .......................................................... 5
Other online marketing (i.e. marketing via email, Facebook or Twitter) .................................................. 6
VoIP (i.e. making calls over the internet using services such as Skype) .................................................... 7
Paying for goods and services via BACS ......................... 8
Ordering goods and services online ............................... 9
Taking orders for goods and services online ................. 10
Taking payment for goods and services online ............. 11
Using HMRC services (e.g. submitting PAYE information, VAT and company tax returns) ......................... 12
Using bespoke software or applications (e.g. accountancy packages) ......................................................... 13
Looking for advice on regulation .................................... 14
Looking for general business advice .............................. 15
File Transfer Protocol or FTP ......................................... 16
Online data storage or back-up ..................................... 17
Online video conferencing .......................................... 18
Cloud services ............................................................. 19

IF NECESSARY: Cloud services are when your applications and data are stored off-site on a service provider’s server and are accessible from any location via the internet.
Remote login to work server (VPN) ................................. 20
Remote log-in to your work PC or laptop ...................... 21
IF 50+ EMPLOYEES (code 7+ at S5/b): Company intranet ........ 22
  *(i.e. an internal private network that is contained within the organisation)*
IF 50+ EMPLOYEES (code 7+ at S5/b): Company extranet .......... 23
  *(i.e. a private network to securely share part of a business's information or operations with external parties e.g. clients/providers)*
Other (WRITE IN) .................................................................. 24
Don’t know ............................................................................. 25
(QA10b) None ........................................................................... 26

ASK IF USE ONLINE MARKETING (CODE 5 or 6 AT QA6)

QA7. You said you use the internet for online marketing or advertising. Which, if any, of the following services or tools has your organization engaged with for marketing and or advertising in the past month?

  Email newsletter ................................................................. 1
  Your own blog or forum on your own website or hosted by a blogging platform such as Blogger, TypePad or Wordpress .......... 2
  Advertise on website / app of local media e.g. local newspaper, local radio station, hyperlocal website ........... 3
  Advertise / market on a ‘vertical’ service e.g. Rightmove (for homes), Autotrader or an online business directory e.g. Yell.com ................................................................. 4
  Advertise with Google e.g. AdWords ...................................... 5
  Sell / advertise on an online market place such as eBay / Amazon Market .......................................................... 6
  Social media websites / apps e.g. Twitter, Facebook, LinkedIn ......................................................................... 7
  Other (specify) ...................................................................... 8
  None of these ........................................................................ 9

ASK ALL WHO DO NOT USE FIXED INTERNET SERVICES AT QA1b (NOT CODES 1 OR 2 QA1b)

QA8. Why does your organisation not use a fixed internet service?

DO NOT READ OUT. MULTI-CODE.

  No need - organisation has access to internet via mobile devices / dongle .................................................. 1
  Organisation has no need to access the internet ................. 2
  Too expensive to have lines installed .................................. 3
  Tariff too expensive ............................................................ 4
  Do not want to commit to a fixed term contract .................. 5
  Infrastructure is not available .............................................. 6
  Other (please state) ............................................................. 7
SECTION B SATISFACTION, DISSATISFACTION AND SWITCHING CONSIDERATION

ASK QB1 FOR EACH OF THE FOLLOWING SERVICES USED AT QA1A. SINGLE CODE FOR EACH.

MOBILE: CODES 6 OR 7 AT QA1a
LANDLINE: CODES 1, 2, 3 OR 10, AT QA1a
INTERNET: CODES 1, 2, 3, 4, 5 or 6 at QA1b

QB1a. Thinking about the (INSERT SERVICE) services your organisation uses, please can you tell me how satisfied or dissatisfied you are with your overall experience, using the following scale.
READ OUT SCALE. SINGLE CODE FOR EACH SERVICE.

Very satisfied ....................................................... 1
Fairly satisfied ...................................................... 2
Neither satisfied nor dissatisfied ............................... 3
Fairly dissatisfied .................................................. 4
Very dissatisfied .................................................... 5
Don’t know (Don’t read out) ................................. 6
Not applicable (Don’t read out) .............................. 7

ASK FOR EACH SERVICE DISSATISFIED WITH AT QB1a (Codes 4 or 5)

QB1b. You said you were dissatisfied with your (INSERT FROM QB1a) service, why is this?
DO NOT READ OUT. INTERVIEWER; PLEASE CODE RESPONSES TO THE APPROPRIATE CATEGORY BELOW.

Cost/value for money ........................................... 1
Poor customer service for general enquiries.............. 2
Poor customer service for complaints handling .......... 3
Coverage issues (HAVE AS AN OPTION FOR MOBILE ONLY) … 4
Connection/speed issues ...................................... 5
Service quality /Reliability issues / faults ................ 6
Billing issues .................................................. 7
Mis-selling / contract issues .................................... 8
Installation time ............................................... 9
Other (please specify) ......................................... 10

SCRIPTING INSTRUCTION: PLEASE RANDOMISE ORDER OF ASKING MOBILE (QB2 - QB17), LANDLINE (QB18 - QB33) AND INTERNET (QB34-B49) SECTIONS BETWEEN INTERVIEWS.

INTERNET; CODES 1, 2, 3, 4, 5 OR 6 AT QA1b
LANDLINE; CODE 1 AT QA1a
MOBILE; CODES 6 OR 7 AT QA1a
B2-B16 - ASK ALL WITH MOBILE PHONES AND / OR SMARTPHONES (CODE 6 AND/OR 7 AT QA1A)

QB2. Thinking specifically about your mobile phones / smartphones that your organization pays for and uses, I am now going to read out some different aspects of the service experience. For each one, please can you tell me how satisfied or dissatisfied you are with this area of your organisation’s mobile phone service, using the following scale. READ OUT SCALE.

- Very satisfied ....................................................... 1
- Fairly satisfied ...................................................... 2
- Neither satisfied nor dissatisfied .............................. 3
- Fairly dissatisfied .................................................. 4
- Very dissatisfied .................................................... 5
- Don’t know (Don’t read out) ....................................... 6
- Not applicable / have not experienced this issue (Don’t read out) ........................................ 7

How satisfied or dissatisfied are you with...READ OUT. RANDOMISE ORDER. SINGLE CODE FOR EACH

a) The reliability of the service in terms of the quality of the signal or connection
b) The repair time for faults with the connection
c) The geographic availability of the service (i.e. the breadth of coverage)

ASK MOBILE SUB SAMPLE ONLY:

d) The ease of contacting the provider’s customer service department
e) The quality of the service provided by the provider’s customer service staff
f) How clear and easily understandable the terms and conditions of your contract are
g) The value for money of the service provided
h) ASK IF CODE 3 AT QA1b: The reliability of the service in terms of being able to send and receive emails or access the internet

ASK ALL WITH MOBILES / SMARTPHONES (CODES 6 OR 7 AT QA1a)

QB3. Does your organization have a specific business contract for your mobile service or do you just use an ordinary personal/residential service?

- Personal / residential contract .................................. 1
- Business contract .................................................... 2
- Pay as you go (PAYG) ............................................. 3
- (Don’t know / Refused).............................................. 4
ASK MOBILE SUB SAMPLE ONLY:
QB4. How long is your current contract for your mobile service?
   - On a rolling 30 day/ monthly contract ...................... 1
   - Up to one year .................................................. 2
   - Over 1 year to 2 years ....................................... 3
   - Over 2 to 5 years ............................................. 4
   - Over 5 to 10 years .......................................... 5
   - Contract period has ended .................................. 6
   - Don’t have a contract - PAYG .............................. 7
   - Other ................................................................ 8
   - Don’t know ........................................................ 9

QB5. Have you ever switched your mobile phone service provider? If so, when was this?
   DO NOT READ OUT. SINGLE CODE
   - Yes, in the last 6 months ....................................... 1
   - Yes, 7 - 12 months ago ........................................ 2
   - Yes, 13 - 18 months ago ....................................... 3
   - Yes, 1.5 to 2 years ago ........................................ 4
   - Yes, 2 to 3 years ago ......................................... 5
   - Yes, more than 3 years ago .................................. 6
   - No, never changed provider .................................. 7

QB6. What is your current thinking regarding changing the company that provides your mobile
   phone service? READ OUT. SINGLE CODE
   - Actively looking for a new mobile phone service provider
     at the moment ..................................................... 1
   - Open to the idea of a new mobile phone service provider .. 2
   - Not interested in a new mobile phone service provider ..... 3

ASK ALL WHO HAVE NEVER SWITCHED AND ARE NOT INTERESTED IN SWITCHING THEIR MOBILE
PHONE PROVIDER (CODE 7 AT B5 AND CODE 3 AT QB6)

QB7. At any time in the last two years, have you considered switching your mobile phone service
   provider?
   DO NOT READ OUT. SINGLE CODE
   - Yes, considered switching, but decided not to ............. 1
   - Never considered switching .................................... 2

ASK ALL WHO CONSIDERED SWITCHING BUT DECIDED NOT TO QB7=1

QB8. And did you actively START LOOKING for an alternative mobile phone service provider?
ASK ALL WITH MOBILES / SMARTPHONES (CODES 6 OR 7 AT QA1a)

QB9 What, if any, issues or problems has your organisation encountered with your mobile phone service in the last 12 months?

DO NOT READ OUT. CODE ALL THAT APPLY

Increased charges .................................................. 1
Unexpected additional charges ................................. 2
Terms and conditions you were not aware of .................. 3
Unsolicited/nuisance or silent calls ............................. 4
Mis-selling (service received was not what was sold originally) ........................................... 5
Poor customer service ........................................... 6
Poor voice quality .................................................... 7
Poor mobile coverage ............................................. 8
Calls dropping out when making a voice call ................. 9
Unable to send texts ............................................. 10
Delays in receiving texts ....................................... 11

ASK ALL WITH SMARTPHONES (CODE 6 AT QA1a):

Poor mobile internet coverage ................................ 12
Slow speeds connecting to / when connected to internet .. 13
Unable to connect to Wi-Fi ...................................... 14
Unable to download documents / pictures .................... 15
Other (please specify) ........................................... 16

None experienced ................................................. 99

ASK IF EXPERIENCED ANY OF CODES 7, 8, 9, 10, 11, 12, 13, 14 OR 15 AT QB9

QB10 You said you experienced [PROBLEM CODES 7-15 AT QB9]. Did this problem /these problems result from a complete loss of service, an intermittent loss of service or just a poor service generally?

Complete loss of service ........................................ 1
Intermittent loss of service .................................... 2
Poor service generally .......................................... 3
ASK IF EXPERIENCED COMPLETE OR INTERMITTENT LOSS OF SERVICE AT QB10

QB11  For how long was your mobile service disrupted?

A few hours .............................................................................................................. 1

________________________days/weeks/months

Can’t remember...................................................................................................... 3

QB12  And on a scale of 1 to 10 where 1 denotes “No impact at all” and 10 denotes “Very great impact”, to what extent did this/these problem(s) with your mobile service have an impact your business?

______________

ASK ALL WITH MOBILES / SMARTPHONES (CODES 6 OR 7 AT QA1a)

QB13  Next I’m going to read you a series of statements that businesses have made about switching mobile phone service providers. For each one please can you tell me how much you agree or disagree with it, using the following scale...READ OUT SCALE.

Agree strongly ................................................................. 1
Agree slightly ................................................................. 2
Neither agree nor disagree .............................................. 3
Disagree slightly ............................................................. 4
Disagree strongly ............................................................ 5
Don’t know (Don’t read out) ............................................ 6

To what extent do you agree or disagree that...
READ OUT. RANDOMISE ORDER. SINGLE CODE FOR EACH
a) There is not enough choice of providers available to my organisation
b) There is a good choice of products and/or services available to my organization

ASK MOBILE SUB SAMPLE ONLY:
c) It is difficult to make comparisons between providers on price
d) It is difficult to make comparisons between providers on network quality (reliability, coverage)
e) It is difficult to make comparisons between providers on customer service
f) The prices of services are clear and transparent,
h) There is not much difference between the providers on the market
i) I fully understand the wording of my contract relating to charges that would be made
if I terminate my service early (known as an early termination charge)
j) I am aware I am able to transfer my existing number/s to a new provider
k) It is difficult to make comparisons between providers because my service needs are complex
ROUTING DEFINITIONS:

SWITCHERS = SWITCHED UP TO 2 YEARS AGO (CODES 1 - 4 AT B5)

CURRENT CONSIDERERS = CURRENTLY CONSIDERING SWITCHING (NOT CODES 1 - 4 AT B5 AND CODE 1 AT QB6)

NON-SWITCHERS = NEVER SWITCHED OR CONSIDERED SWITCHING (CODE 2 AT QB7 OR CODE 7 AT QB5)

NON-RECENT SWITCHERS = SWITCHED LONGER THAN 2 YEARS AGO AND NOT CURRENTLY CONSIDERING SWITCHING (CODES 5 OR 6 AT QB5 AND NOT CODE 1 AT QB6)

PAST CONSIDERERS = CONSIDERED SWITCHING IN PAST TWO YEARS BUT DECIDED NOT TO (CODE 1 AT QB7)

ASK MOBILE NON-SWITCHERS AND NON-RECENT SWITCHERS

QB14 Why have you never switched your mobile provider? / Why have you not switched your mobile provider in the last two years?

MULTICODE DO NOT READ OUT

I do not know how to switch providers
I don’t want to have to change my mobile number/too much hassle to change phone number
I am happy with my existing provider
Too risky/worried it would go wrong
Don’t have time to look into switching
Too difficult to compare the different tariffs /deals offered by each provider
No real difference between providers /they are all the same
Would be worried I made the wrong choice
Worried would lose service during the switchover period
Worried the process would take too long
Don’t want to be tied into a new fixed term contract
We are tied into our existing contract and would incur a penalty charge
Other (specify)

ASK ALL MOBILE PAST CONSIDERERS AND CURRENT CONSIDERERS

QB15 What are/were your reasons for considering switching your mobile phone provider?

DO NOT READ OUT. CODE ALL REASONS. PROBE: ANYTHING ELSE.

Current provider too expensive........................................ 1
Poor customer service from current provider ..................... 2
Poor mobile coverage from current provider .................... 3
Poor mobile internet access from current provider............. 4
Poor call quality from current provider
(e.g. calls dropped, don’t connect, etc.) ......................... 5
Cheaper deal available from another provider ................. 6
Another provider offering a package that
fits my needs better ............................................ 7
Better customer service offered by another provider .... 8
Better mobile coverage offered by another provider .... 9
Want to bundle my services .................................... 10
Other (please specify) ............................................ 11
Don’t know/can’t remember .................................... 12

ASK MOBILE PAST CONSIDERERS
QB16  Why did you decide not to switch your mobile service provider after considering it?

DO NOT READ OUT. MULTI-CODE.

Worried that switching to new provider would result in
worse service from new provider and would be tied
into a contract ..................................................... 1
There was no cost benefit because we would be
subject to a cancellation charge ............................... 2
There was no cost benefit because we couldn’t find
a lower monthly price for the same service ............... 3
Overlapping contracts for different services
that I wanted to switch .......................................... 4
Didn’t want to lose existing phone number ............... 5
Worried would lose service ..................................... 6
Good relations with existing provider/Easier to manage .... 7
There was no cost benefit ........................................ 8
Favorable terms and conditions from existing provider .... 9
Service availability .............................................. 10
Just decided not to bother ..................................... 11
Existing provider persuaded me to stay/
Offered a better deal .......................................... 12
We are tied into our existing contract and would
incur a cancellation charge ................................... 13
Other (please specify) ............................................ 14
Don’t know/can’t remember .................................... 15

NO QB17

ASK IF CODED MORE THAN ONE OF CODES 1-3, 8 OR 10 AT QA1A
QB18. You mentioned earlier that you have the following fixed line services - (READ OUT FROM
QA1a codes 1-3, 8 OR 10 AS APPLICABLE) - which of these would you say is most important
to your business? SINGLE CODE.

Standard PSTN landline telephone ......................... 1
ISDN 2/2e ...................................................... 2
ISDN 30 ....................................................... 3
Leased line or private circuit .................................. 4
Advanced voice services (e.g. Centrex, FeatureLine) .... 5
ASK B19 TO B33 IF 1) SELECT CODE 1 AT QB18 OR 2) ONLY SELECT CODE 1 AT QA1A
READ OUT: For the next few questions I want you to think about your standard PSTN landline service.

QB19. I am going to read out some different aspects of the service experience. For each one, please can you tell me how satisfied or dissatisfied you are with this area of your landline service? READ OUT SCALE.

Very satisfied ....................................................... 1
Fairly satisfied ...................................................... 2
Neither satisfied nor dissatisfied ................................ 3
Fairly dissatisfied .................................................. 4
Very dissatisfied .................................................... 5
Don’t know (Don’t read out) ................................. 6
Not applicable (Don’t read out) ............................... 7

How satisfied or dissatisfied are you with...READ OUT. RANDOMISE ORDER. SINGLE CODE FOR EACH

a) The reliability of the service in terms of the quality of the signal or connection
b) The repair time for faults with the connection
c) The geographic availability of the service (i.e. the breadth of coverage)

ASK LANDLINE SUB SAMPLE ONLY:
d) The ease of contacting the provider’s customer service department
e) The quality of the service provided by the provider’s customer service staff
f) How clear and understandable your contract terms are
g) The value for money of the service provided

QB20. Does your organisation have a specific business contract for your landline service or do you just use an ordinary residential service?

Personal / residential contract .................................. 1
Business contract ..................................................... 2
(Don’t know / Refused)................................................. 3

ASK LANDLINE SUB SAMPLE ONLY:

QB21. How long is your current contract for your landline service?

Up to one year ....................................................... 1
Over 1 year to 2 years ............................................. 2
Over 2 to 5 years ..................................................... 3
Over 5 to 10 years ................................................... 4
Contract period has ended ........................................ 5
No contract plan - on a rolling basis so only have to commit to a deal month by month... 6
Other ................................................................ 7
Don’t know .......................................................... 8
ASK ALL LANDLINE

QB22. Have you ever switched your landline service provider? If so, when was this?
DO NOT READ OUT. SINGLE CODE

Yes, in the last 6 months .............................................. 1
Yes, 7 - 12 months ago ............................................... 2
Yes, 13 - 18 months ago ............................................. 3
Yes, 1.5 to 2 years ago ............................................... 4
Yes, 2 to 3 years ago .................................................. 5
Yes, more than 3 years ago ......................................... 6
No, never changed provider ....................................... 7

QB23. What is your current thinking regarding changing the company that provides your landline service? READ OUT. SINGLE CODE

Actively looking for a new landline service provider at the moment ........................................ 1
Open to the idea of a landline service provider ................................................................. 2
Not interested in a new landline service provider ............................................................... 3

ASK ALL WHO HAVE NEVER SWITCHED AND ARE NOT INTERESTED IN SWITCHING THEIR LANDLINE PROVIDER (CODE 7 AT QB22 AND CODE 3 AT QB23)

QB24. At any time in the last two years have you considered switching your landline service provider?
DO NOT READ OUT. SINGLE CODE

Yes, considered switching, but decided not to .................. 1
Never considered switching ......................................... 2

ASK ALL WHO CONSIDERED SWITCHING BUT DECIDED NOT TO

QB25. And did you actively START LOOKING for an alternative landline provider?

Yes .............................................................................. 1
No ............................................................................... 2

ROUTING DEFINITIONS:
SWITCHERS = SWITCHED UP TO 2 YEARS AGO 2 YEARS AGO (CODES 1 - 4 AT QB22)
CURRENT CONSIDERERS = CURRENTLY CONSIDERING SWITCHING (NOT CODES 1 - 4 AT QB22 CODE 1 AT QB23)
NON-SWITCHERS = NEVER CONSIDERED SWITCHING (CODE 2 AT QB24 OR CODE 7 AT B22)
NON–RECENT SWITCHERS = SWITCHED LONGER THAN 2 YEARS AGO AND NOT CURRENTLY CONSIDERING SWITCHING (CODES 5 OR 6 AT QB22 AND NOT CODE 1 AT QB23)

PAST CONSIDERERS = CONSIDERED SWITCHING IN PAST TWO YEARS BUT DECIDED NOT TO (CODE 1 AT QB24)

QB26  What, if any, issues or problems has your organisation encountered with your landline service in the last 12 months?

DO NOT READ OUT. MULTICODE.

- Increased charges .................................................. 1
- Additional charges (unexpected) .............................. 2
- Terms and conditions you were not aware of .............. 3
- Unsolicited/nuisance or silent calls ........................... 4
- Mis-selling (service received was not what was sold originally) .............................................. 5
- Poor customer service ........................................... 6
- Poor voice quality .................................................. 7
- Poor service reliability (loss of service/technical fault)  
  Other (Please state) ............................................ 8
- None experienced ............................................... 99

ASK IF EXPERIENCED POOR VOICE QUALITY OR POOR SERVICE RELIABILITY (CODES 7 OR 8 AT QB26)

QB27. You said you experienced [PROBLEM CODES 7 OR 8 AT QB26]. Did this problem /these problems result from a complete loss of service an intermittent loss of service or just a poor service generally?

- Complete loss of service ....................................... 1
- Intermittent loss of service ................................... 2
- Poor service generally ........................................ 3

ASK IF EXPERIENCED COMPLETE OR INTERMITTENT LOSS OF SERVICE AT QB26

QB28. For how long was your landline service disrupted?

- A few hours .............................................................. 1
- _______________ days/weeks/months

- Can’t remember .................................................... 3

QB29. And on a scale of 1 to 10 where 1 denotes “No impact at all” and 10 denotes “Very great impact”, to what extent did this/these problem(s) with your landline service have an impact your business?
ASK ALL

QB30 Next I’m going to read you a series of statements that businesses have made about switching landlines service providers. For each one please can you tell me how much you agree or disagree with it, using the following scale...READ OUT SCALE.

Agree strongly ...................................................... 1
Agree slightly ....................................................... 2
Neither agree nor disagree ....................................... 3
Disagree slightly .................................................... 4
Disagree strongly ................................................... 5
Don’t know (Don’t read out) ................................. 6

To what extent do you agree or disagree that...
READ OUT. RANDOMISE ORDER. SINGLE CODE FOR EACH
a) There is not enough choice of providers available to my organisation
b) There is a good choice of products and/or services available to my organisation

ASK LANDLINE SUB SAMPLE ONLY:
c) It is difficult to make comparisons between providers on price
d) It is difficult to make comparisons between providers on network quality (reliability etc.)
e) It is difficult to make comparisons between providers on customer service
f) The prices of services are clear and transparent, making it easy to make comparisons between providers
g) I am able to negotiate effectively with my provider on tariffs and services
h) There is not much difference between the providers on the market
i) It is difficult to compare the different tariffs that are available from landline service providers
j) The wording in my contract relating to charges if I terminate my service early (known as an early termination charge) is clear and transparent
k) I am aware I am able to port my number to a new provider.

ASK LANDLINE NON-SWITCHERS AND NON-RECENT SWITCHERS

QB31 Why have you never switched your landline provider / Why have you not switched your landline provider in the last two years?
MULTICODE, DO NOT READ OUT

I do not know how to switch providers ....................... 1
There is no other provider available ............................ 2
I am happy with my current provider ........................... 3
I am able to negotiate effectively with my current provider on tariffs and services ................................. 4
There is not enough choice of providers available in our area ..................................................................... 5
There is not enough choice of providers for organisations of our size .................................................... 6
There is not enough choice of products or services available to my organization ......................................... 7
Too risky/worried it would go wrong ............................. 8
Don’t have time to look into switching ......................... 9
Too difficult to compare the different tariffs /deals
offered by each provider ........................................ 10
No real difference between providers /they are all
the same .................................................................. 11
Would be worried I made the wrong choice ............... 12
Worried would lose service during the switchover period .. 13
Worried the process would take too long ..................... 14
Don’t want to be tied into a new fixed term contract ...... 15
We are tied into our existing contract and would incur
a penalty charge ......................................................... 16
Other ........................................................................ 17
Don’t know ................................................................ 18

ASK LANDLINE PAST CONSIDERERS AND CURRENT CONSIDERERS
QB32  What are/were your reasons for considering switching your landline service provider?

DO NOT READ OUT. CODE ALL REASONS. PROBE: ANYTHING ELSE.

Current provider too expensive .................................. 1
Poor customer service from current provider .............. 2
Poor service reliability from current provider ............ 3
Poor call quality from current provider ...................... 4
Cheaper deal available from another provider .......... 5
Another provider offered a package that
fitted my needs better .............................................. 6
Another provider offered a better range of services ...... 7
Better customer service offered by another provider ...... 8
Better service reliability offered by another provider .... 9
Better call quality from another provider .................. 10
Wanted to bundle my services .................................. 11
Was not intending switching my landline phone provider
but was offered a good deal as part of a bundle
with another service ............................................... 12
Contacted by another provider ................................ 13
Advertising from another provider made me look into it ... 14
Recommendation ....................................................... 15
Other (please specify) ............................................... 16
Don’t know/can’t remember .................................... 17
ASK ALL LANDLINE PAST CONSIDERERS
QB33  Why did you decide not to switch your landline service provider after considering it?

DO NOT READ OUT. MULTI-CODE

No cost benefit - Because subject to a cancellation charge. 1
No cost benefit - Because couldn’t find a lower monthly price for the same service ........................................2
Overlapping contracts for different services that I wanted to switch ................................................3
Didn’t want to lose existing phone number ......................................4
Worried would lose service .................................................5
High installation costs ..........................................................6
Good relations with current provider/Easier to manage …..7
Favorable terms and conditions from existing provider …..8
Service availability .................................................................9
Just decided not to bother ..............................................10
Existing provider persuaded me to stay/ Offered a better deal ......................................................11
We are tied into our existing contract and would incur a penalty charge ...................................................12
Other (please specify) ..............................................................13
Don’t know/can’t remember ...........................................14

ASK B34 TO B49 TO ALL WITH INTERNET SERVICES (CODES 1-5AT QA1b)
QB34  Now thinking about your internet service, I am going to read out some different areas of the service experience. For each one, please can you tell me how satisfied or dissatisfied you are with this area of your internet service? READ OUT SCALE.

Very satisfied .................................................................1
Fairly satisfied .............................................................2
Neither satisfied nor dissatisfied ........................................3
Fairly dissatisfied ..........................................................4
Very dissatisfied ............................................................5
Don’t know (Don’t read out) ...........................................6
Not applicable (Don’t read out) ..................7

How satisfied or dissatisfied are you with...READ OUT. RANDOMISE ORDER. SINGLE CODE FOR EACH

a)  The reliability of the service in terms of the quality of the connection

ASK INTERNET SUB SAMPLE ONLY:
b)  The repair time for faults with the connection

c)  The ability to access the speed that has been paid for
d)  The geographic availability of the service (i.e. The ability to obtain the service where your company is based)

ASK INTERNET SUB SAMPLE ONLY:
e) The ease of contacting the provider’s customer service department  
f) The quality of the service provided by the provider’s customer service staff  
g) The speed of the connection  
h) The geographic availability of symmetrical services where the upload and download speeds is the same  

**ASK INTERNET SUB SAMPLE ONLY:**  
i) How clear and easily understandable the terms and conditions of your contract are  
j) The reliability of the service in terms of being able to send and receive emails or access the internet  

**ASK INTERNET SUB SAMPLE ONLY:**  
k) The value for money of the service provided  

**ASK ALL WITH INTERNET SERVICES (CODES 1-5 AT QA1b)**  

QB35 What is the maximum speed available on the internet package you subscribe to?  
EXPLAIN IF NECESSARY: THIS IS THE MAXIMUM SPEED SPECIFIED IN THE CONTRACT, NOT THE MAXIMUM SPEED ACTUALLY RECEIVED  

____________________Mb/s OR Gb/s ..................................................1  
Don’t know..............................................................................2  

QB36. Does your organization have a specific business contract for your internet service or do you just use an ordinary residential service?  

Personal / residential contract ........................................1  
Business contract ..........................................................2  
(Don’t know / Refused) ....................................................3  

**ASK INTERNET SUB SAMPLE ONLY:**  

B37. How long is your current contract for your internet service?  

Up to one year.................................................................1  
Over 1 year to 2 years....................................................2  
Over 2 to 5 years.............................................................3  
Over 5 to 10 years ..........................................................4  
Contract period has ended ..............................................5  
No contract plan - on a rolling basis, so only have to commit to a deal month by month ......6  
Other.................................................................................7  
Don’t know..........................................................................8
ASK ALL WITH INTERNET SERVICES (CODES 1-5 AT QA1b)
QB38. Have you ever switched your internet service provider? If so, when was this?
DO NOT READ OUT. SINGLE CODE

Yes, in the last 6 months .................................................1
Yes, 7 - 12 months ago ..................................................2
Yes, 13 - 18 months ago ..................................................3
Yes, 1.5 to 2 years ago ....................................................4
Yes, 2 to 3 years ago ......................................................5
Yes, more than 3 years ago ..............................................6
No, never changed provider ..........................................7

QB39. What is your current thinking regarding changing the company that provides your internet service?
DO NOT READ OUT. SINGLE CODE
Actively looking for a new internet service provider at the moment ..........................................1
Open to the idea of a new internet service provider .................................................................2
Not interested in a new internet service provider .................................................................3

ASK ALL WHO HAVE NEVER Switched AND ARE NOT INTERESTED IN SWITCHING THEIR INTERNET SERVICE PROVIDER (CODE 7 AT QB38 AND CODE 3 AT QB39)
QB40. At any time in the last two years, have you considered switching your internet service provider?
DO NOT READ OUT. SINGLE CODE
Yes, considered switching, but decided not to ..................1
Never considered switching ..........................................2

ASK ALL WHO CONSIDERED SWITCHING BUT DECIDED NOT TO
QB41. And did you actively START LOOKING for an alternative internet service provider?

Yes ........................................................................1
No ......................................................................2

ROUTING DEFINITIONS:
SWITCHERS = SWITCHED IN LAST 2 YEARS (CODES 1 - 4 AT QB38)
CURRENT CONSIDERERS = CURRENTLY CONSIDERING SWITCHING (NOT CODES 1 - 4 AT QB38 AND CODE 1 AT QB39)
NON-SWITCHERS = NEVER CONSIDERED SWITCHING (CODE 2 AT QB40 OR CODE 7 AT QB38)
NON-RECENT SWITCHERS = SWITCHED LONGER THAN 2 YEARS AGO AND NOT CURRENTLY CONSIDERING SWITCHING (CODES 5 OR 6 AT QB38 AND NOT CODE 1 AT QB39)
PAST CONSIDERERS = CONSIDERED SWITCHING IN THE PAST TWO YEARS BUT DECIDED NOT TO (CODE 1 AT QB40)

QB42  What, if any, issues or problems has your organisation encountered with your internet service in the last 12 months?

DO NOT READ OUT. MULTICODE.

Increased charges .......................................................... 1
Unexpected additional charges ........................................ 2
Terms and conditions you were not aware of ....................... 3
Mis-selling (service received was not what was sold originally) ....................................................... 4
Poor customer service .................................................... 5
Poor service reliability (e.g. Temporary loss of service/connection) .................................................... 6
Slow download speeds ..................................................... 7
Slow upload speeds ......................................................... 8
Poor installation of service by engineer ......................... 9
Other (Please state) .......................................................... 10

ASK IF EXPERIENCED ANY OF CODES 6, 7 OR 8 AT QB42

QB43  You said you experienced [PROBLEM CODES 6, 7 OR 8 AT QB42]. Did this problem /these problems result from a complete loss of service, an intermittent loss of service or just a poor service generally?

Complete loss of service ...................................................... 1
Intermittent loss of service ............................................. 2
Poor service generally .................................................... 3

ASK IF EXPERIENCED COMPLETE OR INTERMITTENT LOSS OF SERVICE AT QB43

QB44. For how long was your internet service disrupted?

A few hours .......................................................................... 1

_________________________days/weeks/months

Can’t remember ................................................................... 3

QB45. And on a scale of 1 to 10 where 1 denotes “No impact at all” and 10 denotes “Very great impact”, to what extent did this/these problem(s) with your internet service have an impact your business?

___________________________________
ASK ALL WITH INTERNET SERVICES (CODES 1-5 AT QA1b)

B46 Next I’m going to read you a series of statements that businesses have made about switching internet service provider. For each one please can you tell me how much you agree or disagree with it, using the following scale... READ OUT SCALE.

Agree strongly ...................................................... 1
Agree slightly ....................................................... 2
Neither agree nor disagree ....................................... 3
Disagree slightly .................................................... 4
Disagree strongly ................................................... 5
Don’t know .......................................................... 6

To what extent do you agree or disagree that...
READ OUT. RANDOMISE ORDER. SINGLE CODE FOR EACH

a) There is not enough choice of providers available to my organisation
b) There is a good choice of products and/or services available to my organization

ASK INTERNET SUB SAMPLE ONLY:
c) It is difficult to make comparisons between providers on price
d) It is difficult to make comparisons between providers on network quality (reliability, speeds)
e) It is difficult to make comparisons between providers on customer service
f) The prices of services are clear and transparent making it easy to make comparisons between providers
g) I am able to negotiate effectively with my provider on tariffs and services
h) There is not much difference between the providers on the market
i) It is difficult to compare the different tariffs that are available from internet service providers
j) The wording in my contract regarding charges if I terminate my service early (known as an early termination charge) is clear and transparent

ASK INTERNET NON-SWITCHERS AND NON-RECENT SWITCHERS

QB47 Why have you never switched your internet service provider / Why have you not switched your internet service provider in the last two years?
DO NOT READ OUT. MULTICODE

I do not know how to switch providers ....................... 1
There is no other provider available .......................... 2
I am happy with my current provider .......................... 3
There is not enough choice of products or services available to my organization .......................... 4
Too risky/worried it would go wrong ......................... 5
Don’t have time to look into switching ....................... 6
Too difficult to compare the different tariffs /deals offered by each provider .............................. 7
No real difference between providers /they are all the same .................................................... 8
Would be worried I made the wrong choice .............. 9
Worried would lose service during the switchover period . 10
Worried the process would take too long ..................... 11
Don’t want to be tied into a new fixed term contract ...... 12
We are tied into our existing contract and would incur
a penalty charge .................................................. 13
Other (please specify) ............................................ 14
Don’t know/can’t remember .................................... 15

ASK ALL INTERNET PAST CONSIDERERS AND CURRENT CONSIDERERS
QB48 What are/were your reasons for considering switching your internet service provider?

Current provider too expensive .................................. 1
Poor customer service from current provider .............. 2
Poor service reliability from current provider .............. 3
Slow connection speed from current provider .............. 4
Cheaper deal available from another provider ............ 5
Another provider offered a package that
fitted my needs better ............................................ 6
Another provider offered a better range of services ...... 7
Better customer service offered by another provider .... 8
Better service reliability offered by another provider .... 9
Faster connection speed offered by another provider ..... 10
Wanted to bundle my services .................................. 11
Was not intending switching my internet provider
but was offered a good deal as part of a bundle
with another service .............................................. 12
Contacted by another provider ................................ 13
Recommendation .................................................. 14
Advertising from another provider made me look into it ... 15
Other (please specify) ............................................ 16
Don’t know/can’t remember .................................... 17

ASK INTERNET PAST CONSIDERERS
QB49 Why did you decide not to switch your internet service provider after considering it?

DO NOT READ OUT. MULTI-CODE

No cost benefit - Because subject to a cancellation charge. 1
No cost benefit - Because couldn’t find a lower monthly
price for the same service ....................................... 2
Overlapping contracts for different services that
I wanted to switch ................................................ 3
Didn’t want to lose existing email address ................. 4
Worried would lose service ..................................... 5
High installation costs .......................................... 6
Good relations with current provider/Easier to manage .. 7
Favorable terms and conditions from existing provider ... 8
Service availability .............................................. 9
Just decided not to bother ...................................... 10
Existing provider persuaded me to stay/
Offered a better deal ............................................ 11
We are tied into our existing contract and
would incur a penalty charge ................................. 12
Other (please specify)........................................... 13
Don’t know/can’t remember................................. 14

END OF INTERNET SECTION

SECTIONS C / D / E TO BE ASKED OF SUB-GROUPS
RESPONDENTS TO BE ALLOCATED TO EACH SUB-GROUP ACCORDING TO WHETHER HAVE
SWITCHED OR MADE A COMPLAINT.

SECTION C: SWITCHING IN DETAIL

IF NOT SWITCHED ANY SERVICE IN PAST 2 YEARS, GO TO SECTION D OR E AS APPROPRIATE

IF SWITCHED ONLY ONE SERVICE IN PAST 2 YEARS ASK SWITCHING SECTION ABOUT THAT SERVICE

IF SWITCHED TWO OR THREE SERVICES IN PAST 2 YEARS, ASK:

QC1 You told me earlier that you had switched your [SERVICES SWITCHED] in the last two
years. Did you switch both/all three services at the same time?

SHOW SERVICES AS APPROPRIATE

<table>
<thead>
<tr>
<th></th>
<th>Mobile</th>
<th>Landline</th>
<th>Broadband</th>
</tr>
</thead>
<tbody>
<tr>
<td>Same time</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Not at same time</td>
<td>2</td>
<td>2</td>
<td>2</td>
</tr>
</tbody>
</table>

ASK ALL WHO SWITCHED ONE OR MORE SERVICES AT THE SAME TIME

QC2 And did you switch your [SERVICES SWITCHED] to the same provider or to different
providers?

<table>
<thead>
<tr>
<th></th>
<th>Mobile</th>
<th>Landline</th>
<th>Broadband</th>
</tr>
</thead>
<tbody>
<tr>
<td>Same provider</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Different provider</td>
<td>2</td>
<td>2</td>
<td>2</td>
</tr>
</tbody>
</table>
IF SWITCHED TWO OR THREE SERVICES TO THE SAME SUPPLIER AT SAME TIME, ASK COMBINED SWITCHING SECTION ABOUT BOTH/ALL SERVICES SWITCHED

IF DID NOT SWITCH BOTH/ALL SERVICES AT THE SAME TIME OR SWITCHED AT SAME TIME BUT TO DIFFERENT PROVIDERS, ASK FOR EACH SERVICE SWITCHED SEPARATELY

IF SWITCHED TWO SERVICES AT THE SAME TIME TO SAME PROVIDER AND THE OTHER SERVICE SEPARATELY, ASK FOR THE TWO SWITCHED AT THE SAME TIME COMBINED AND SEPARATELY FOR SERVICE SWITCHED SEPARATELY
QC3 What were your reasons for switching your [SERVICE(S)] provider?

DO NOT READ OUT. CODE ALL REASONS. PROBE: ANYTHING ELSE.

Cheaper deal available from new provider ..................... 1
New provider offered a package that
fitted my needs better ........................................... 2
New provider offered a better range of services ......... 3
Better customer service offered by new provider ........ 4
Previous provider too expensive ................................ 5
Poor customer service from previous provider .......... 6
Wanted to bundle my services .................................. 7
Contacted by another provider ................................. 8
Advertising from another provider made me look into it 9
Recommendation ................................................. 10

Better mobile coverage offered by new provider
[MOBILE SWITCHERS] ............................................. 11
Better mobile internet access offered by new provider
[MOBILE SWITCHERS] ............................................. 12
Better mobile call quality offered by new provider
[MOBILE SWITCHERS] ............................................. 13
Poor mobile coverage from previous provider
[MOBILE SWITCHERS] ............................................. 14
Poor mobile internet access from previous provider
[MOBILE SWITCHERS] ............................................. 15
 Poor mobile call quality from previous provider (e.g. calls
dropped, don’t connect, etc.) [MOBILE SWITCHERS] ........ 16

Better landline call quality from new service
[LANDLINE SWITCHERS] .......................................... 17
Poor landline call quality [LANDLINE SWITCHERS] .... 18
Was not intending switching my landline provider
but was offered a good deal as part of a bundle with
another service [LANDLINE SWITCHERS] .................... 19
Better landline service reliability offer by new provider
[LANDLINE SWITCHERS] .......................................... 20
Poor landline service reliability from previous provider
[LANDLINE SWITCHERS] .......................................... 21

Slow connection speed from previous provider
[INTERNET SWITCHERS] .......................................... 22
Faster connection speed offered by new provider
[INTERNET SWITCHERS] .......................................... 23
Was not intending switching my internet provider
but was offered a good deal as part of a bundle with
another service [INTERNET SWITCHERS] .................... 24
Better internet service reliability offer by new provider
[INTERNET SWITCHERS] .......................................... 25
Poor internet service reliability from previous provider
[INTERNET SWITCHERS] ........................................ 26

Other (please specify) ............................................ 27
Don’t know/can’t remember .................................... 28

ASK ALL WHO HAVE SWITCHED MORE THAN ONE SERVICE

QC4  Which, if any, of the following, did you experience when switching your [SERVICE(S)]
provider?

SHOW STATEMENTS APPROPRIATE TO SERVICES SWITCHED
RANDOMISE ORDER OF STATEMENTS BETWEEN INTERVIEWS
READ OUT. MULTI-CODE.

No problems experienced........................................ 1

Paying charges for early termination of contract .......... 2
Difficulty getting a PAC from existing provider
[MOBILE SWITCHERS] ............................................ 3
Difficulty porting telephone number(s)
[MOBILE AND LANDLINE SWITCHERS] .......................... 4
Difficulty getting a MAC from existing provider
[INTERNET SWITCHERS] ........................................ 5
Difficulty transferring email across to new service
[MOBILE AND INTERNET SWITCHERS] .......................... 6
Knowing how to switch ........................................... 7
Paying for two services during the switching process .... 8
Contacting provider to cancel service ......................... 9
Process took longer than expected .......................... 10
Previous provider sending bills for cancelled service .... 11
Technical issues ................................................... 12
Arranging start and stop dates ................................. 13
Temporary loss of mobile service [MOBILE SWITCHERS] .... 14
Temporary loss of landline service [LANDLINE SWITCHERS] 15
Temporary loss of internet service [INTERNET SWITCHERS] . 16
Existing provider persuasion to stay ........................ 17
Existing provider cancelled the switching process ...... 18
Charged wrong amount by new provider ................... 19
Delay in receiving new equipment ............................ 20
Obtaining information on switching from previous provider 21
Anything else (PLEASE STATE) .................. 22

ASK ALL MOBILE SWITCHERS

QC5.  When you switched your mobile provider, did you keep your mobile telephone number(s) or
did you get a new number?

Kept old number(s) ............................................... 1
Got new number(s) .......................................................... 2

**ASK ALL WHO SWITCHED LANDLINE AND/OR INTERNET PROVIDER**

QC6 Thinking back to when you switched your [landline and/or internet] provider, did your new provider arrange everything for you or did you have to contact your old provider too?

- Everything arranged by new provider .............................. 1
- Contacted both old and new provider ............................... 2
- Can’t remember .................................................................. 3

**ASK IF CONTACTED BOTH OLD AND NEW PROVIDER - QC6=2**

QC7 Did you cancel your contract with your old provider and start a new contract with your new provider separately or did you do both as part of one switching process?

- Cancelled with old provider and started new contract with new provider .................................................. 1
- One process ....................................................................... 2
- Can’t remember .................................................................. 3

**ASK ALL WHO EXPERIENCED LOSS OF MOBILE SERVICE - QC4=14**

QC8 You mentioned you experienced a loss of mobile service during your switch. How long did you not have a mobile service for?

___________________ hours/days/weeks

**ASK ALL WHO EXPERIENCED LOSS OF LANDLINE SERVICE - QC4=15**

QC9 You mentioned you experienced a loss of landline service during your switch. How long did you not have a landline service for?

___________________ hours/days/weeks

**ASK ALL WHO EXPERIENCED LOSS OF BROADBAND SERVICE - QC4=16**

QC10 You mentioned you experienced a loss of broadband service during your switch. How long did you not have a broadband service for?

___________________ hours/days/weeks
QC11 Overall, once you had decided which provider to use, how easy did you find it to switch provider?

Was it... READ OUT. SINGLE-CODE.

Very easy ............................................................ 1
Fairly easy................................................................... 2
Fairly difficult ...................................................... 3
Very difficult ........................................................... 4
Don’t know/can’t remember ..................................... 5

END OF COMBINED SWITCHING SECTION

SEPARATE MOBILE SWITCHING SECTION

ASK ALL MOBILE SWITCHERS WHO DID NOT SWITCH AS PART OF A BUNDLE

Intro: You told me earlier that you switched your mobile service in the last 2 years.

QC12 What were your reasons for switching your mobile phone provider?

DO NOT READ OUT. CODE ALL REASONS. PROBE: ANYTHING ELSE.

Cheaper deal available from new provider ................. 1
New provider offered a package that
fitted my needs better .............................................. 2
New provider offered a better range of services ........... 3
Better mobile coverage offered by new provider .......... 4
Better mobile internet access offered by new provider .... 5
Better mobile call quality offered by new provider ...... 6
Previous provider too expensive .................................. 7
Poor customer service from previous provider ............ 8
Poor mobile coverage from previous provider ............ 9
Poor mobile internet access from previous provider ...... 10
Poor call quality from previous provider
(e.g. calls dropped, don’t connect, etc.) ...................... 11
Wanted to bundle my services .................................. 12
Contacted by another provider .................................. 13
Advertising from another provider made me look into it ... 14
Recommendation ...................................................... 15
Other (please specify) ............................................. 16
Don’t know/can’t remember .................................... 17

QC13 Which, if any, of the following did you experience difficulty with when switching your mobile phone provider?
RANDOMISE ORDER OF STATEMENTS BETWEEN INTERVIEWS
READ OUT. MULTI-CODE.

No problems experienced.................................................1

Paying charges for early termination of contract ............2
Difficulty Getting a PAC from existing provider ..........3
Difficulty porting telephone number/s .......................4
Difficulty transferring email across to new service ..........5
Knowing how to switch..................................................6
Paying for two services during the switching process ....7
Difficulty contacting provider to cancel service ..........8
Process took longer than expected.............................9
Previous provider sending bills for cancelled service......10
Technical issues .............................................................11
Difficulty arranging start and stop dates ....................12
Temporary loss of service...........................................13
Existing provider tried to persuade you to stay ..........14
Existing provider cancelled the switching process .......15
Charged wrong amount by new provider ....................16
Delay in receiving new equipment .............................17
Obtaining information on switching from previous provider18
Other (PLEASE STATE)...................................................19

ASK ALL WHO EXPERIENCED LOSS OF MOBILE SERVICE - QC13 = 13

QC14. You mentioned you experienced a loss of mobile service during your switch. How long did you not have a mobile service for?

___________________ hours/days/weeks

ASK ALL MOBILE SWITCHERS WHO DID NOT SWITCH AS PART OF A BUNDLE

QC15. When you switched providers, did you keep your mobile telephone number(s) or did you get a new number?

Kept old number(s) ..........................................................1
Got new number(s) .........................................................2

QC16. Overall, once you had decided which provider to use, how easy did you find it to switch mobile provider?

Was it....READ OUT. SINGLE-CODE.

Very easy..............................................................................1
Fairly easy...........................................................................2
Fairly difficult ......................................................................3
Very difficult ........................................................................4
Don’t know/can’t remember ............................................5
SEPARATE LANDLINE SWITCHING SECTION

ASK ALL LANDLINE SWITCHERS WHO DID NOT SWITCH AS PART OF A BUNDLE

Intro: You told me earlier that you switched your landline service in the last two years

QC17 What were your reasons for switching your landline service provider?

DO NOT READ OUT. CODE ALL REASONS. PROBE; ANYTHING ELSE.

Cheaper deal available from new provider .................... 1
New provider offered a package that fitted my needs better ............................................ 2
New provider offered a better range of services .............. 3
Better customer service offered by new provider .......... 4
Better service reliability offered by new provider .......... 5
Previous provider too expensive ...................................... 6
Poor customer service from previous provider .......... 7
Poor service reliability from previous provider ............ 8
Poor call quality from previous provider .................... 9
Better call quality from new provider ......................... 10
Wanted to bundle my services .................................. 11
Was not intending switching my landline provider but was offered a good deal as part of a bundle with another service .................................................. 12
Contacted by another provider .................................. 13
Advertising from another provider made me look into it ... 14
Recommendation .................................................... 15
Other (please specify) ............................................ 16
Don’t know/can’t remember .................................... 17

QC18 Thinking back to when you switched provider, did your new provider arrange everything for you or did you have to contact your old provider too?

Everything arranged by new provider ......................... 1
Contacted both old and new provider .......................... 2
Can’t remember .................................................... 3

ASK IF CONTACTED BOTH OLD AND NEW PROVIDER

QC19 Did you cancel your contract with your old provider and start a new contract with your new provider separately or did you do both as part of one switching process?

Cancelled with old provider and started new contract with new provider ............................................ 1
One process .................................................... 2
Can’t remember .................................................... 3

ASK ALL LANDLINE SWITCHERS WHO DID NOT SWITCH AS PART OF A BUNDLE

QC20 Which, if any, of the following did you experience difficulty with when switching your landline service provider?
READ OUT. MULTI-CODE.

No problems experienced........................................... 1
Cancellation charges for early termination of contract ......2
Difficulty porting telephone number(s) .........................3
Knowing how to switch ............................................4
Paying for two services during the switching process ....5
Contacting provider to cancel service ..........................6
Process took longer than expected ...............................7
Previous provider sending bills for cancelled service ......8
Technical issues .....................................................9
Arranging start and stop dates ..................................10
Temporary loss of service .......................................11
Existing provider tried to persuade you to stay ..........12
Existing provider cancelled the switching process ....13
Charged wrong amount by new provider ....................14
Obtaining information on switching from previous provider15
Other (please specify)...........................................16

ASK ALL WHO EXPERIENCED LOSS OF landline SERVICE - QC20 =11

Q21 You mentioned you experienced a loss of landline service during your switch. How long did you not have a landline service for?

___________________ hours/days/weeks

Q22 Overall, once you had decided which provider to use, how easy did you find it to switch landline provider? Was it ...

READ OUT. SINGLE-CODE.

Very easy..............................................................1
Fairly easy...........................................................2
Fairly difficult ......................................................3
Very difficult .......................................................4
Don’t know/can’t remember.................................5

SEPARATE INTERNET SWITCHING SECTION

ASK ALL INTERNET SWITCHERS WHO DID NOT SWITCH AS PART OF A BUNDLE

Intro: You told me earlier that you switched your internet service provider in the last two years

QC23 What were your reasons for switching your internet service provider?

Cheaper deal available from new provider .................1
new provider offered a package that fitted my needs better .................................................2
New provider offered a better range of services.........3
Better customer service offered by new provider ..........4
Better service reliability offered by new provider ..........5
Faster connection speed offered by new provider ..........6
Previous provider too expensive ................................7
Poor customer service from previous provider ............8
Poor service reliability from previous provider ..........9
Slow connection speed from previous provider ..........10
Wanted to bundle my services ................................11
Was not intending switching my internet provider
but was offered a good deal as part of a bundle
with another service.............................................12
Contacted by another provider ..............................13
Recommendation ...............................................14
Advertising from another provider made me look into it ...15
Other (please specify)..........................................16
Don’t know/can’t remember ..................................17

QC24 Thinking back to when you switched provider, did your new provider arrange everything for
you or did you have to contact your old provider too?

Everything arranged by new provider ........................1
Contacted both old and new provider ........................2
Can’t remember...............................................3

ASK IF CONTACTED BOTH OLD AND NEW PROVIDER - QC24=2

QC25 Did you cancel your contract with your old provider and start a new contract with your new
provider separately or did you do both as part of one switching process?

Cancelled with old provider and started new
contract with new provider.....................................1
One process......................................................2
Can’t remember...............................................3

ASK ALL INTERNET SWITCHERS WHO DID NOT SWITCH AS PART OF A BUNDLE

QC26 Which, if any, of the following did you experience any difficulties with when switching your
internet service provider?

READ OUT. MULTI-CODE.

No problems experienced....................................1

Cancellation charges for early termination of contract ......2
Other Cost/billing issue........................................3
Difficulty getting a MAC from existing provider ..........4
Difficulty porting telephone number(s) .....................5
Transferring email to new service ..........................6
Knowing how to switch.......................................7

Delay in receiving equipment ................................8
Paying for two services......................................9
Contacting provider to cancel service ......................... 10
Process took longer than expected ............................. 11
Provider sending bills for cancelled service ................. 12
Technical issues ................................................... 13
Arranging start and stop dates .................................. 14
Temporary loss of service ....................................... 15
Provider persuasion to stay .................................... 16
Existing provider cancelled switch ............................ 17
Charged wrong amount by new provider ..................... 18
Obtaining information on switching from previous provider19
Other (Please specify) ......................................... 20

ASK ALL WHO EXPERIENCED LOSS OF SERVICE - QC26=15
QC27. You mentioned you experienced a loss of service during your switch. How long did you not
have a broadband service for?
___________________ hours/days/weeks

ASK ALL INTERNET SWITCHERS WHO DID NOT SWITCH AS PART OF A BUNDLE
QC28  Overall, once you had decided which provider to use, how easy did you find it to switch
internet provider? Was it ...
READ OUT. SINGLE-CODE.
Very easy ............................................................ 1
Fairly easy ............................................................ 2
Fairly difficult ..................................................... 3
Very difficult ....................................................... 4
Don’t know/can’t remember .................................. 5

END OF INTERNET SECTION

SECTION D: CANCELLATION CHARGES

SCRIPTING NOTE: WORD ACCORDING TO WHETHER OR NOT MENTIONED CANCELLATION
CHARGES FOR ONE OR MORE SERVICES AT MULTIPLE SWITCHING SECTION QC4 = 2, QC13 = 2,
QC20=2, QC26=2

QD1. You mentioned you had encountered cancellation charges. Were you subject to a
cancellation charge, known as an early termination charge (ETC), to leave one or more of
your previous communications service providers? IF YES PROBE: Did you pay the charge?

Yes - paid it ......................................................... 1
Yes - but did not pay it ............................................ 2
Yes, but not sure whether paid it ............................. 3
No - was not subject to an ETC ............................. 4
Not sure whether subject to a charge ...................... 5
IF YES (whether paid or not at QD1) QD1=1 or QD1=2
QD2.  <(QD(1))>And how much did you have to pay to leave the contract?/>(QD(2))>And how much were you meant to pay to leave the contract?/

£______________
Can’t remember.................................................................9999

IF YES (whether paid or not at QD1) QD1=1 or QD1=2
QD3. Were you aware that there would be a cancellation charge before you switched provider?

Yes .................................................................1
No .................................................................2
Can’t remember........................................................3

IF YES (whether paid or not at QD1) QD1=1 or QD1=2
QD4. Were you informed about how this ETC was calculated?

Yes..................................................................1
No ......................................................................2
Can’t remember.....................................................3

ASK IF YES (INFORMED OF HOW CHARGE WAS CALCULATED AT QD4) QD4=1
QD5. And do you think the amount you paid/would have had to pay was fair?

Yes..................................................................1
No ......................................................................2
Can’t remember.....................................................3

ASK IF NO (DID NOT THINK AMOUNT WAS FAIR AT QD5 QD5=2
QD6. In what way was it not fair?

Charge was too high .................................................1
The service quality had deteriorated .........................2
The service quality never matched what I was sold .........3
I was near the end of the contract ..............................4
Other..................................................................5

ASK IF YES (whether paid or not at QD1) QD1=1 or QD1=2
QD7. How much longer did you have to run on the contract when you terminated it?

Less than 6 months....................................................1
Over 6 months but less than 12 months ......................2
12 - 18 months.......................................................3
Over 18 months but less than 2 years .........................4
2 years or more.....................................................5
Can’t remember......................................................6

ASK ALL WHO MENTIONED ONE OR MORE PREVIOUS PROVIDERS SENT BILLS FOR CANCELLED SERVICE AT MULTIPLE SWITCHING SECTION QC4=11, QC13=10, QC20=8, QC26=12
QD8. You mentioned your previous provider sent bills for a cancelled service, what was the reason for this?

Still within contract with previous provider....................... 1
Notice period on contract meant I had to pay for the service even though it was cancelled ........................................ 2
Had to pay for the next month in advance and then receive a refund ................................................................. 3
Problems with the provider’s billing process/systems meant bills were sent out .................................................. 4
Other .................................................................................. 5
ASK ALL WHO SAID PROCESS TOOK LONGER THAN EXPECTED AT MULTIPLE SWITCHING SECTION
QC4=10, QC13=9, QC20=7, QC26=11

QD9. You mentioned the process to switch took longer than expected, why was that?

DO NOT READ OUT
Delay in receiving equipment necessary to connect (e.g. handset, SIM card, router) .......................................... 1
Problem porting number (MOBILE AND LANDLINE SWITCHERS) 2
Technical problem with the switch ............................................. 3
Delayed/cancelled engineer visit ............................................. 4
Other ............................................................................ 4

SECTION E - CONTRACTS/TRANSPARENCY/MIS-SELLING

Next I’d like to ask you a few questions about your contracts for your actual communications services themselves.

ASK QE1 – QE5 FOR MOBILE, LANDLINE OR INTERNET, ACCORDING TO SUB GROUP ALLOCATION
ASK ALL ON A CONTRACT QB4 =1-5 / B21 =1-4 / B37 =1-4

QE1 Thinking back to when you first took out your contract with your provider of your [SERVICE] service, where was the sales agreement with your contract provider reached? Was it:

READ OUT
Over the phone ...................................................................... 1
Online ................................................................................. 2
During a visit by a sales person or engineer ......................... 3
In a retail store ..................................................................... 4
Other (Please state) .............................................................. 5
Can’t remember ..................................................................... 6

QE2 Please can you tell me how much you agree or disagree with the following statements about your current contract for [SERVICE]

Agree strongly ........................................................................ 1
Agree slightly ........................................................................ 2
Neither agree nor disagree .................................................... 3
Disagree slightly ................................................................. 4
Disagree strongly ............................................................... 5
Don’t know ............................................................................ 6

a) I am aware of the key terms and conditions of the contract
b) I did not look at the key terms and conditions before I signed the contract  
c) I find that my contract terms and conditions are plain and intelligible  
d) I am able to access the terms of my contract easily (either because they were sent in a written format or are available online)  
e) It would be helpful to have all key terms presented “bold and upfront” within a contract  
f) I always read the Terms and Conditions of my communication contracts  
g) I would be more likely to read my contract if key terms were presented “bold and upfront”  
h) I typically find my contract Terms and Conditions easy to understand and free of jargon  
i) I have been surprised by a cost or condition imposed under Ts&Cs (such as a financial penalty, an increased price, or a charge for doing something such as leaving the contract early)  
j) I have lost out in other ways as a result of terms I was unaware of or did not realise would apply? (For instance being tied into a contract for longer than expected, being denied redress, or having to accept a product different from the one ordered?)  
k) I have had problems because of things that have not been specified in the contract

ASK ALL WHO HAVE HAD PROBLEMS BECAUSE OF THINGS NOT SPECIFIED IN THE CONTRACT (CODES 1 OR 2 AT QE2K)

QE3 What problems have you had due to things not being specified in the contract?

OPEN ENDED PROBE FULLY

ASK ALL

QE4 Does the contract include details of charges due on termination of service and how these are calculated?  
Yes .............................................................................. 1  
No ................................................................................. 2  
Not sure .............................................................................. 3

ASK IF ON A BUSINESS CONTRACT FOR THIS SERVICE [AT QB3=2/QB20=2/QB36=2]

QE5 Thinking of your service level agreement, also known as an SLA, how satisfied are you that your provider fulfils the agreed levels of service? 
Extremely satisfied ...................................................... 1  
Satisfied ........................................................................... 2  
Neither satisfied nor dissatisfied .............................. 3  
Dissatisfied ................................................................. 4  
Extremely dissatisfied ................................................. 5
ASK ALL WHO HAVE A PERSONAL/RESIDENTIAL CONTRACT FOR [SERVICE AT QB3=1/QB20=1/QB36=1]
QE6 Why have you chosen not to have a business service for your (INSERT SERVICE) service?

DO NOT READ OUT

Never thought about it/considered it........................................... 1
Business contracts are more expensive/
personal contracts are cheaper.................................................. 2
Personal contract is fine for my business ................................. 3
My business needs more than a residential package, but
even the smallest/cheapest business packages available
offer higher levels of service (bandwidth/capacity) than
my business needs .................................................................. 4
Better/faster service available on a personal contract
than on a business one .......................................................... 5
Haven’t got round to switching to a business contract......... 6
Other (please specify).............................................................. 7
Don’t know............................................................................ 8

END OF SUB-GROUP SECTION

ASK ALL WHO HAVE A RESIDENTIAL CONTRACT OR PAYG FOR ONE OR MORE SERVICES (AT B3=1
OR 3/QB20=1/QB36=1)

QE7 You said earlier that you [have a personal or residential contract] / [use Pay As You Go] for
your [SERVICE(S) FROM B3/QB20/QB36 ON A RESIDENTIAL CONTRACT], are you aware that
some business contracts provide enhanced service provision, better levels of customer service
and faster response rates to problems than a personal or residential service?

Yes, aware ........................................................................... 1
No, not aware ........................................................................ 2

SECTION F: GENERAL ATTITUDES AND BEHAVIOURS

ASK ALL

QF1. Next I’m going to read you a number of statements that people have made about their
personal attitude towards communications technology and services. For each one please
can you tell me how much you agree or disagree with it, using the following scale...READ
OUT SCALE.

Agree strongly ........................................................................ 1
Agree slightly ......................................................................... 2
Neither agree nor disagree ..................................................... 3
Disagree slightly ................................................................. 4
Disagree strongly ............................................................... 5
Don’t know ............................................................................ 6
To what extent do you agree or disagree with...
READ OUT. RANDOMISE ORDER. SINGLE CODE FOR EACH

a) I don’t have confidence in my ability to identify which new communications products or services would be valuable for the organisation

c) I feel very well informed about how communications services can help the organisation survive and grow

f) The needs of my business are well catered for in the communications market

g) The ability of my business to grow has been impacted by the lack of suitable communications products and services available to me

h) I am aware of the regulations that protect my business when buying and using communications services

i) Information is widely available about the communications products and services that are on the market

j) It is easy to identify which providers my business can potentially use

k) Communications services are fundamental to my/our business; without them I/we could not achieve our goals

l) I am worried about possible breaches of security in the communications services my organization uses.

QF2 What sources of information do you use to keep yourself informed about the communications services your organisation uses? READ OUT. MULTI CODE

Google/a search engine ........................................... 1
Provider websites .................................................. 2
Provider newsletters/emails, etc............................... 3
Independent review websites .................................... 4
Specialist Industry magazines ................................. 5
Mainstream media/press ......................................... 6
Friends/Colleagues ................................................ 7
Government information websites or publications ....... 8
Advisory bodies ..................................................... 9
Ofcom website ..................................................... 10
Trade Body Website .............................................. 11
Other (please specify) ........................................... 12
Don’t know (Don’t read out) ................................. 13

QF3 Are you aware of Ofcom’s “Advice for Businesses” web pages?

Aware ................................................................ 1
Unaware ............................................................. 2

QF4 Are there any communications services that are not currently available to your organisation that you feel your business would benefit from being able to use? What are these?

OPEN ENDED PROBE FULLY

None ................................................................. 1
QF5  And are there any communications services that you are actively looking at acquiring or upgrading in the next 12 months?

IF YES PROBE: WHICH SERVICES ARE YOU THINKING OF GETTING OR UPGRAADING?

Not looking to acquire or upgrade any services. 1

Standard PSTN landline telephones ............. 2
4G Mobile service .................................... 3
ADSL Broadband (internet via fixed line) ...... 4
Fibre Broadband ...................................... 5
Cable Broadband (internet via cable) .......... 6
Mobile Broadband through a USB Modem or ‘dongle’ ............................................. 7
ISDN 2/2e ................................................ 8
ISDN 30 .................................................. 9
Leased lines or private circuits .................... 10
VPN ......................................................... 11
Ethernet .................................................. 12
Voice over Internet Protocol or VoIP ............ 13
Video conferencing .................................. 14
Other (Specify) ........................................ 15

QF6  Thinking about each of the communication services your organisation uses, how important is each of these to your organisation? Please use a scale of 1 to 10 where:

• 1 is not at all important, it would be inconvenient but you could live without them

• 10 is absolutely vital - your business could not carry on without them.

SINGLE CODE 1-10, ALLOW DON’T KNOW

<table>
<thead>
<tr>
<th>Service</th>
<th>Code Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fixed phone lines services (READ OUT: this includes standard lines and ISDN lines)</td>
<td>CODES 1, 2, 3, 10 FROM QA1a</td>
</tr>
<tr>
<td>Leased lines or private circuits used for purposes other than dedicated internet access</td>
<td>CODE 8 FROM QA1a</td>
</tr>
<tr>
<td>Mobile phone services (READ OUT: this includes smartphones and standard mobile phones)</td>
<td>CODES 6, 7 FROM QA1A</td>
</tr>
<tr>
<td>Fixed internet services (READ OUT: This includes: dedicated lines, dial up, broadband and cable)</td>
<td>CODES 1, 2, 4, 5 FROM QA1b</td>
</tr>
<tr>
<td>Mobile internet services (READ OUT: This includes mobile internet via smartphone, dongle or USB modem)</td>
<td>CODE 3 FROM QA1b</td>
</tr>
<tr>
<td>Satellite broadband service</td>
<td>CODE 6 FROM QA1b</td>
</tr>
</tbody>
</table>
Finally I have a couple of quick questions about your organisation for classification purposes.

P1. Which of the following ranges comes closest to your organisation’s total annual spend on landline, mobile and internet services (including email, web access and any related data services).

Please exclude anything you spend on hardware or external support?

IF 2+ SITES AT S6: Please think about your total spend across all sites within the UK.

**READ OUT. SINGLE CODE**

- Less than £500 .......................................................... 1
- £500-£999 .................................................................. 2
- £1,000-£1,999 .......................................................... 3
- £2,000-£4,999 .......................................................... 4
- £5,000-£9,999 .......................................................... 5
- £10,000 or more .......................................................... 6
- Don’t know/refused .................................................... 7

P2. FOR PRIVATE SECTOR ASK (code 1 at S1): Approximately what was your annual turnover for the last financial year (2015/16)? WRITE IN £’s

FOR PUBLIC AND THIRD SECTOR (code 2 or 3 at S1) ASK: Approximately what was the budget you had available for the last financial year (2015/16)?

P3. IF DON’T KNOW ASK: Which of the following ranges do you think comes closest? READ OUT. SINGLE CODE

- Under £50,000 .......................................................... 1
- £50,000-£75,000 ........................................................ 2
- Over £75,000 - £100,000 .......................................... 3
- Over £100,000-£250,000 ........................................... 4
- Over £250,000 - £500,000 ........................................... 5
- Over £500,000-£1 million ......................................... 6
- Over £1m-£5m .......................................................... 7
- Over £5m-£10m .......................................................... 8
- Over £10m ............................................................... 9
- Don’t know/refused ................................................... 10

P4 Is your business VAT registered?

- Yes ........................................................................... 1
- No ........................................................................... 2
- Not sure ................................................................. 3
P6. Does your business operate a PAYE scheme? READ OUT IF NECESSARY: This is when Income Tax and National insurance are deducted from your [and/or your employees’ pay] and is paid direct to HMRC on their behalf? Employees are usually given a paper or electronic payslip showing their gross pay, deductions for Income Tax and National Insurance and their net pay each time they are paid.

Yes ................................................................. 1
No ................................................................. 2
Not sure .......................................................... 3

P7. IF SOLE TRADER ASK: Which of the following do you do on a regular basis, by which I mean once a month or more often?

IF 2+ EMPLOYEES ASK: Which of the following do your organisation’s employees do on a regular basis, by which I mean as a regular arrangement as part of their normal working pattern, not just occasionally?

RANDOMISE ORDER. CODE ALL MENTIONED

1. Work from home
2. Work out of the office in other specific locations/offices/buildings
3. Work while travelling domestically (i.e. within the UK)
4. Work while travelling internationally
5. Work in sparsely populated areas in the countryside

P8. Are your customers or clients...READ OUT. CODES 3 AND 4 CAN BE CODED TOGETHER. OTHER THAN THAT, SINGLE CODE

Mainly based in your local area.............................. 1
Mainly based in your region................................. 2
Spread across the UK........................................... 3
Spread across other countries.............................. 4
Don’t know (Don’t read out)................................. 5
ONLY ASK TO PRIVATE SECTOR S1(1)

P9. And are your customers... READ OUT. SINGLE CODE

Mainly other businesses........................................ 1
Mainly consumers............................................... 2
A mix of businesses and consumers....................... 3
Don’t know (Don’t read out)................................. 4

P10. Are you [SOLE TRADER] / members of your organisation [2 OR MORE Staff]

READ OUT. SINGLE CODE

Entirely office based ........................................... 1
Mainly office based.......................................... 2
Work equally in and out of an office ...................... 3
Mainly work away from an office.......................... 4
Entirely work away from an office....................... 5

ASK IF MULTIPLE SITES (S6 = Codes 2 - 7). OTHERS SKIP TO P12

P11. Are your sites...

READ OUT. SINGLE CODE

Mainly based in towns and cities ......................... 1
Mainly based in industrial sites or business parks outside
towns and cities ............................................. 2
Mainly based in rural areas................................ 3
Spread across a mix of urban, suburban and rural areas . 4
Don’t know (Don’t read out)................................. 5

ASK IF SINGLE SITE (S6 = Code 1) OTHERS SKIP TO P13

P12. Is your business based...READ OUT. SINGLE CODE

At your home address in a town or city
(IF CODE 1 AT S7) ............................................. 1
At your home address in a village or other rural location
(IF CODE 1 AT S7) ............................................. 2
At commercial premises in a town or city
(NOT CODE 1 AT S7) ........................................ 3
At a commercial premises in a village or other rural location
(NOT CODE 1 AT S7) ........................................ 4
On an industrial estate or business park in a town or city
(NOT CODE 1 AT S7) ........................................ 5
On an industrial estate or business park in a village or other rural location
(NOT CODE 1 AT S7) ........................................ 6
Don’t know (Don’t read out)................................. 7
ASK IF BASED ON AN INDUSTRIAL SITE OR BUSINESS PARK (P11 = code 2 OR P12 = codes 5 or 6)
OTHERS SKIP TO P15
P13. How long have you been based on an industrial estate or business park?

- Less than one year ............................................. 1
- Between one and five years ................................. 2
- Between six and ten years ................................. 3
- Longer than ten years ........................................ 4
- Don’t know (Don’t read out) ............................. 5

ASK IF BASED ON AN INDUSTRIAL SITE OR BUSINESS PARK (P11 = code 2 OR P12 = codes 5 or 6)
P14. Do you have to buy any of your communication services from a provider or providers chosen by the site owner or landlord or are you able to choose which providers you use? IF NO CHOICE PROBE: IS THAT FOR LANDLINE, INTERNET OR BOTH?

- Have no choice of landline provider ....................... 1
- Have no choice of internet provider ....................... 2
- No, I am able to choose my own provider ............... 3
- Don’t know .................................................. 4

ASK ALL
P15. Has your business ever wanted to move to a different location but not been able to due to the communications services your business requires not being available in the chosen location?

- Yes ................................................................ 1
- No .................................................................. 2
- Don’t know .................................................. 3

ASK P16 IF YES AT P15
P16. Which communications services were not available in the location you wanted to move to?

- Standard PSTN telephone lines .......................... 1
- ADSL broadband ............................................ 2
- Cable/fibre broadband ..................................... 3
- ISDN 2 / 2e lines ............................................ 4
- ISDN 30 lines ................................................ 5
- Mobile signal ............................................... 6
- Other (please specify) .................................... 7

ASK ALL
P17. Do you [or anyone else working in your business] have any of the following?
READ OUT EACH DISABILITY AND THEN ASK FOR A ‘YES’ OR ‘NO’

- Impaired sight (including blind) ......................... 1
- Impaired hearing (including deaf) ....................... 2
- Impaired speech (including dumb) ..................... 3
- Impaired use of hands or arms ........................... 4
- Need to use a wheelchair to move around ............ 5
- Any other form of disability (please specify) ........ 6
- None of these ............................................... 7
RESPONDENTS IN ENGLAND, SCOTLAND AND NORTHERN IRELAND: GO TO P21

ASK P18 AND P19 OF RESPONDENTS IN WALES

P18. To what extent do you use the Welsh language in your business dealings?

READ OUT OF NECESSARY

- All dealings are done in Welsh ................................ 1
- Use Welsh most of the time ................................... 2
- Use Welsh equally with English ............................... 3
- Use English most of the time ................................. 4
- Never use Welsh ................................................ 5

ASK IF USE WELSH AT ALL: (CODES 1 – 4 AT P13), OTHERS GO TO P21

P19. Do any of your communications service providers communicate with you in Welsh in any form?

MULTICODE POSSIBLE

- Yes, spoken ...................................................... 1
- Yes, printed information ...................................... 2
- Yes, website available in Welsh .............................. 3
- No ........................................................................ 4

ASK FOR EACH TYPE OF COMMUNICATION WELSH NOT COMMUNICATED IN (NOT CODES 1, 2 OR 3 AT P19) OTHERS THANK AND CLOSE

P20. And would you like your communications service providers to:

- Speak to you in Welsh .......................................... 1
- Provide printed information in Welsh ....................... 2
- Provide a Welsh version of their website ................... 3

ASK ALL

P21. Thank you for taking part in this survey today. As a result of this survey, Ofcom may be interested in finding out more about particular issues that businesses experience with their communications services. Would you be willing to be contacted again by a research agency working on behalf of Ofcom to participate in further research on this subject?

[SINGLE CODE]

- Yes - would be willing ............................................ 1
- No - would not be willing ....................................... 2

[IF YES]