SME Communications research

Qualitative summary report

Contents

Overall summary

Context

20 communications decisions makers from a range of SMEs (varying by size, region, business sector and their organisation's usage of communications) were interviewed in a two-stage process. Stage one used an online research platform to begin to cover the context of their business, their experience of the pandemic and the way in which they purchase communication services. The second stage used depth interviews (via Zoom) to obtain more detail on this and focussed on views of providers and more complex issues such as net neutrality. Fieldwork was conducted between 8th and 30th November 2021.

The overall impact of the pandemic and associated government social distancing regulations differed depending on the business sector, whether it was an 'in-person' business or otherwise, with their ability to adapt to these changes varying in difficulty. Some businesses had flourished, and others struggled.

Communication needs had to adapt to remote working, but some businesses were already working in this way pre-pandemic.

The economic outlook is a mixed picture for them (some positive and some negative) and there is an expectation of continuing uncertainty and instability going forward.

Communication services

Following the pandemic, most organisations had to adapt to finding new ways to communicate, mostly through the adoption of video conferencing to replace meetings, but also communicating with staff and 'walk-in' customers in a different way, so they had adopted greater use of social media and messaging. These changes may have happened anyway, but the pandemic massively accelerated this.

Changes have largely been reactive rather than proactive, with rapid decisions needed to adapt to enable business continuity. Themes observed were:

- Remote access (i.e. staff being able to access the organisation's IT systems and files, and work on them almost in the same way as if they were in the office) for office-based SMEs became critical and there has been heavier reliance on employees' own Wi-Fi connections and the adoption of VPN.

- Fixed line reliance was reduced, with landlines typically only used for credibility (e.g., because it is typical for a business to have one) or habit.
- VoIP adoption by a minority of businesses for practicality and ease of use.
- Mobile phones: some already in place with employees or rolled out to employees to a greater extent. Smaller businesses continued to use personal mobile contracts for work purposes (i.e. business owners using their own personal mobile phones). Smaller businesses were more likely to use smartphones for business connectivity when outside their workplace (e.g., checking social media and emails for sales/ communication).

The main problems experienced appeared to be with connectivity both with mobile phones and poor Wi-Fi. The latter was mitigated through use of signal boosters (for smaller businesses).

Experiences with communication providers

Differences between larger and smaller SMEs existed among our sample. Larger SMEs had a more formalised system in place with IT managers, whereas smaller businesses behaved in quite a domestic way with a residential contract rather than a business one. This is the case across both internet (broadband) and mobile services, and where the business is based at home, work requirements piggy-back onto residential landline contacts.

Attitudes and considerations when switching and how the pandemic has influenced this

When considering whether to switch and which supplier to use, cost has been less of an issue for the SMEs in our sample than it was before the pandemic. Instead there has been a focus on reliability and avoiding additional complications and hassle. Respondents felt it was a case of "better the devil you know" rather than "the grass is always greener". As such, switching was deprioritised during the pandemic with more of a consideration to review and take stock now and plan for the future. Considering how they will permanently adapt to change is now on many of the SMEs'.

Net Neutrality

Organisations were not familiar with the term net neutrality but, once explained, the concept seemed reasonable to them. An "equal" and "fair" service makes sense, but one that is of a certain minimum standard.

Main Findings

The wider business context for SMEs, the impact of the pandemic and the current economic environment

The overall impact of the pandemic and associated government social distancing regulations differed depending on the business sector. For example:

- 'In-person' customer contact related businesses such as restaurants, barbers and some retail businesses were closed completely and since have been stop-start in reopening.
- Non in-person customer contact businesses could continue working but had to adapt to remote working and were impacted by the inability to network face-to-face. Adapting communications was one of the biggest areas of change (see below).
- Some organisations were able to flourish, for example those involved in online sales or who could deliver services more easily via video conferencing. In these cases, a larger remote client base could be built.
- Most affected in our sample was the organisation that contributed to a primary care offering: the pandemic "changed almost everything" for them.

How communications needs had to adapt due to the pandemic and remote working

For most smaller organisations, working remotely from home was already something they were accustomed to. Therefore, ways of home working were typically already set up, services were in place and accessibility was not of any specific concern.

Larger traditionally office-based SMEs needed to adapt to homeworking and now tend to work in a hybrid manner with employees in home and business locations. Their use of communication technology had to adapt to this.

The knock-on impact of the pandemic (i.e. the current issues they are experiencing)

SMEs were asked what issues had emerged as a result of the pandemic. Whilst issues with communications were not frequently cited, this is not to say they are not important. Communications methods are already set-up and able to be relied on, but if anything does go wrong or communications don't function as well as needed, this would then be an issue. Common themes that did emerge were:

Business growth issues:

- Adapting **business strategy** and sector direction, e.g., delivering products or services in a new way, such as take-away from restaurants and training via video conferencing rather than in-person
- (Re)-**building client** base
- The need to **expand the business**, particularly where international growth is desired
- Competing with **growing competitors**, or losing customers causing extra pressure on the business, emphasising the need for optimum efficiencies
- **Falling/ lower demand** and **reduced profit margins** for some businesses

Resource shortages:

- Dealing with challenges of **labour shortages** particularly in the hospitality sector
- Those whose sectors rely heavily upon **supply chains** have had issues, such as increased prices and delays

Adapting to changed working environment:

- Adaption to the technological landscape (exacerbated by Covid)
- Changing timelines, which relate to the current economic climate
- Continuing to **adapt to home working** (here to stay/ hybrid home/office working)

The perceived **economic outlook** is a mixed picture, with some SMEs more positive than others. Most anticipate change and some expect growth, but others worry about uncertainty, instability and that the future economic context will be problematic for them.

These experiences span both smaller and larger SMEs in our sample: e.g., a satellite comms engineering company had doubled revenue compared to last year, restaurants are much busier than in 2020, and those involved in online retail (such as clothing and babywear) had experienced increases in sales. For other organisations their workload is back to usual levels.

SMEs use of and needs from communications services and the impact of the pandemic

Overall impact

The impact of the pandemic has been transformational for some businesses in terms of how it operates:

- Customer-facing SMEs: during the pandemic these SMEs had to find ways to interact with customers via digital means. For example: restaurants branching off into takeaways and needing platforms to support that and NHS conducting phone and video appointments
- Non-customer-facing SMEs: adapted to home working, which included providing employees with the right communications technology in some circumstances and all faced a steep learning curve with video conferencing. Examples included:
  - Restaurants ensuring they had communications channels set up with furloughed staff via social media (Facebook) which they hadn't needed previously
  - SMEs providing VPN access, with some offering business mobiles and laptops to facilitate working from home

> *"I couldn't ask the rest of the staff to go buy their own laptop, we had to provide them with some form of tool to work from home to do their job properly."*
> (Security services, 14 employees)

- Typically, existing home-based SMEs had less of an adjustment and for them it was largely 'business as usual', except when travelling to meet clients had to be replaced with digital connections

SMEs largely felt that some of the changes in communications would have probably happened anyway over time, but the pandemic has massively accelerated this.

Importantly, the general perception of what is acceptable as a 'professional' form of communication in a business environment has evolved due to the pandemic (e.g., only a minority of people would have considered using a video call to consult with a health professional, a therapist, an accountant, or a guitar shop). While some of these are still not preferred ways of communication for some (especially in a medical context) they are nevertheless becoming **viable alternatives.**

Most businesses in our sample feel they have been very effective in how they've adapted to the new situation. It has been recognised as an intense time of change and challenge for most; some didn't have

a chance to take a proper step back and reflect on communications and suppliers through the pandemic, it was more a *reactive* approach to the evolving situation than a *proactive* one:

- For office-based SMEs who had systems in place for staff working remotely, this was a much smoother transition
- For SMEs that more-or-less ceased trading, there was the opportunity during the initial lockdown to reflect on the business and future strategy, positioning, and planning. This seemed particularly applicable to the hospitality sector
    - E.g., a pub/ restaurant changed their concept, adapting to a new customer base, while another offered their high-end restaurant dining via takeaway
    - New businesses emerged off the back of the pandemic, this included a luxury motorhome business, an online clothing sales business and a baby tableware organisation

An example of an initially reactive approach to the pandemic:

"Covid forced us into a situation. It wasn't a proactive decision to go with (Microsoft) *Teams. Maybe we should have said 'okay, come on, let's take a step back'. But we didn't have the time. We had to get everybody working. I've now set an IT plan for next year, where we're going to look at upgrading various parts of our technology."*

(Satellite comms engineering business, 53 employees)

Internet and data connections and remote access to data systems

Remote data access was key to office-based businesses and was crucial for staff working from home to access central systems. The businesses therefore became dependent on employees' own broadband:

- Some considered reimbursing staff (e.g., if usage went over domestic package allowances and incurred additional costs for the home worker) but no one reported actually having to implement this (the typical stance among many SMEs was that any additional costs of using private connections and accounts were being offset by reduced costs of travel into work)
- Some issues with connectivity/speed of residential internet were mentioned – in larger SMEs the IT support would be on hand to help resolve these

Most office-based SMEs already had some members of staff occasionally working remotely, therefore certain solutions were already in place (e.g., VPN). It was a much easier transition for them. Others had to arrange VPN and train non tech savvy staff.

Fixed and mobile telephones

Fixed lines:

Overall, among our sample, there was less reliance on fixed lines now than before the pandemic. One larger business said they only had a landline to make their business look credible:

"It's a bit like having a website - you need to have it because everybody else does. But actually, practically, most people phone on the mobile or use Teams or use teleconferencing packages now."

(Construction, 100 employees)

Some organisations are moving to **VoIP**. For example, an NHS practice had previously needed one phoneline per receptionist:

"By doing VoIP we can have unlimited handsets on one line, we can have lots of people dialling in and we can pick up calls from anywhere… It's absolutely great, but there are limitations, it requires people knowing how to log in"

(NHS practice, 150 employees)

A small business was taking its first steps:

"The system is complicated, we're in the process of arranging a new phone system which will be more integrated and will allow text messaging."

(Music retail, 5 employees)

An accountancy firm moved to VoIP three years ago – it saves them money and provides extra functionality:

"You can transfer calls to each other, even if you're not in the office… The functionality is more convenient, it looks more professional if you're always available, it's a no brainer."

(Accountancy, 30 employees)

Mobiles:

Most larger SMEs already had mobiles for some staff and used business contracts. Usually these were provided to more senior staff, salespeople, field staff or those who would be taking client calls from home. They were mostly offered as a gesture from their employer to help draw the line between work and private life (as you can switch it off at end of day) and not having to pass on personal numbers to clients/ suppliers. Some of this behaviour was in place pre-pandemic, but for some it was because of the move to working from home/remotely.

For smaller SMEs, the same mobile phone was used for both personal and business use and this didn't change during the pandemic.

Most in our sample did not change their approach to use of mobile phones due to the pandemic but there were exceptions to this:

- Mobile phones had been sourced for a restaurant chain after lockdown. Given the high call volume to a limited number of landlines, senior customer-facing staff were given mobile phones so that VIP customers could call them to book tables, rather than have lengthy call waits
- A barber had to adapt from walk-ins to customers needing to make appointments, therefore a handset was bought for this purpose
- A security services business provided handsets to all office staff working from home (previously only engineers needed mobiles for when working off-site)

In most cases, it appears the handsets are fairly standard without the need for advanced capabilities. Depending on the businesses, handsets were used for:

- Making or receiving calls where the business warranted this
- Used to check communications with customers via social media sites such as Facebook, Instagram, etc
- Responding to emails while out of office (e.g., while commuting or visiting clients)
- A way to easily communicate with staff (most commonly WhatsApp – popular in hospitality), but also technicians using mobiles to take pictures for marketing purposes (therefore a good quality camera is useful)

None of the SMEs interviewed were aware of eSIMS. There was some mild interest from larger SMEs as it would be practical to have only one handset (the smaller SMEs in our research used the same number for work and leisure, and they were happy with the way this worked for them).

The main problem raised with mobile phones was bad coverage/reception, which had resulted in switching providers for some, or an intention to move at the end of their contract. The perception was that their existing provider wouldn't be able to do anything about reception issues, therefore a change of provider might improve things.

5G had been experienced by some (this was mainly in London and the South East of England). For those who were in a 5G area, they noticed its impact most when they were *no longer* in the coverage area as then things (e.g., mobile internet access) seemed to lag more. For those who hadn't experienced 5G, it wasn't something they were particularly thinking about, and they didn't feel like they were missing out by not having it.

Video conferencing and messaging services

This is used to some extent by all businesses in our sample that had used primarily face-to-face communication pre-pandemic: it is used for internal staff communications (mainly on Teams, also Zoom) and for conducting meetings with clients and suppliers (mainly Zoom).

Some SMEs have relied on this heavily since the start of pandemic (mainly office-based businesses). Other SMEs use it less heavily, preferring face-to-face contact where possible. However there was a widely held view that video conferencing is here to stay among all sizes of organisation. The benefits of it identified were:

- Saving travel costs and time
- Easier to reach a wider range of customers, e.g., employees that used to travel frequently are now able to do to the same work over video conferencing, and a wider geographic spread is possible (for example online guitar lessons, retail sales, accountancy and therapy)

There was a notably quick adaptation to using video calls by most types of SMEs within our sample. The easy-to-use software and the prolific uptake of Zoom – even by less tech savvy customers – has meant that SMEs felt the process has been relatively seamless. Most SMEs in our sample claimed to use video conferencing on laptops, with only occasional use through mobiles (which is perceived to be more limited due to a small screen and some reception issues).

"Pre-pandemic I'd never heard of Zoom, it was a lot different, it was important for our clients just to have access to a strong connection so they could occasionally do video calls but mostly just for emails and general stuff, whereas now everyone needs to be on video all the time, so it's definitely a change."

(Shared working space/hot desking business, 2 employees)

A larger SME (a satellite comms engineering company) that was more familiar and engaged with more advanced communications methods mentioned interest in a more immersive videoconferencing experience, akin to virtual reality, where you can almost 'feel' the room. His understanding was that the experience is still slow and jerky as it's new tech but is something they would be looking into. They are planning to upgrade their setup to potentially accommodate this in the future.

The current perceived limitations of video conference technology were accepted, for example in relation to exchanging more creative ideas:

"There is no substitute, especially in engineering, for going round a whiteboard – to get people's reaction, body language etc."

(Satellite Engineering, 53 employees)

Wireless and data requirements

Wi-Fi was of significant importance to almost all SMEs, from larger more complex organisations to smaller businesses (even a barber said they needed it to run their CCTV). SMEs in our sample cited reputational damage with customers as one impact of insufficient Wi-Fi.

Connectivity (especially wireless) is crucial:

"The orders, for when you're in the restaurant, are sent through the POS system which prints off in the kitchen, and obviously all the printers are linked to Wi-Fi and all the tables are linked to Wi-Fi. So if the Wi-Fi does go down, it's an absolute nightmare … when the simplest things go wrong, because it can completely hold service. It just stops everything."

(Fine dining restaurant group, 245 employees)

"Everyone is meeting remotely - Zoom, Teams - so literally unless we're able to give really stable strong Wi-Fi connections so that everyone can be on conference calls at the same time, we can't really operate, so it's such an important part of our business."

(Shared working space/hot desking business, 2 employees)

Wi-Fi was used for a variety of reasons by SMEs in our sample:

- Provision of unlimited Wi-Fi to clients
- Access to data stored on the cloud
- EPOS sales tills reliance
- Ambient music in restaurants runs on it
- Restaurant orders reliance
- Staff clock-in systems
- CCTV
- Health and safety compliance
- Wireless printers
- Wi-Fi reliant calls
- Wi-Fi reliant video conferencing
- Offsite working
- Stock updates/processing orders

The majority of larger SMEs in our sample had wireless connectivity on their premises, even if part of the network was still wired to some extent (e.g., for desktop computers). A move towards Wi-Fi to reduce cables at offices (for aesthetics), and to allow more flexibility (hot desking, use of mobile devices) was desired by some office-based organisations.

There was one exception to this in our sample (an NHS surgery) where Wi-Fi was not functional enough to be relied upon. Therefore wired connections were used almost entirely.

Some businesses had separate Wi-Fi logins for internal and external users. For example, in an office scenario with clients visiting onsite, a separate connection would be set up for visitor use. Restaurants / coffee places would have guest Wi-Fi as well as one for the use of the business (one exception: of a pub specifically not providing Wi-Fi in order to encourage face-to-face socialising).

The exact Wi-Fi connection speeds were not top of mind to SMEs in our sample, but there was a tendency to choose the best internet access speeds (generally) available at the time of purchase. Some SMEs had already upgraded to fibre broadband, with some of these upgrades being prompted by experience of connectivity issues and suppliers recommending an upgrade as the only way to tackle them. In one instance, this involved a large investment to rewire a leased building:

Other businesses had set up signal boosters, which had worked to improve Wi-Fi connectivity.

Backups:

A theme that emerged was the SMEs' desire for reassurance, and the subsequent implementation of some form of backup for the organisation's main IT and communication systems. Some examples include:

- Larger SMEs in our sample tended to have an internal IT Manager/team or use an external IT support company to assist them
- Some smaller SMEs used their mobiles to create a hotspot (e.g., a guitar shop). A hypothesis could be drawn that businesses that are larger, but not sufficiently large to warrant IT support, may be more exposed without having a 'Plan B'
- Some SMEs revert to wired internet if they experienced issues with Wi-Fi (e.g., a security service provider experienced Wi-Fi buffering issues at times when live streaming CCTV, so a physical cable is kept as a backup)

Most SMEs thought they had some guaranteed assistance from providers, but unless they'd had an issue that needed resolving many were unsure on the service guarantee details. A lack of assistance outside typical office hours was a concern for some SMEs.

Experiences with communication providers

Experiences in general

Within our sample, there were big differences in the way in which larger and smaller organisations dealt with providers:

Larger SME owners/senior staff were less likely to deal with the service providers directly when issues arise (internet mainly, but some fixed line and mobile needs). They were more likely to have an IT Manager or even an IT team to deal with providers (especially if using multiple providers) or an external IT support company. These SMEs felt it is the more efficient approach to get things done, especially when the time taken to resolve any issue is of key importance (to avoid disruptions and loss of business).

Most would have had these solutions already in place pre-pandemic but, in our sample, there were examples of growing demand for IT support and businesses taking active steps to put that in place:

- An NHS practice hired an IT manager. This was as a direct result of their communications landscape dramatically changing over the course of pandemic, and they were currently dealing with 12 different systems
- A fine dining restaurant chain hired an IT support company to help manage new systems that they had introduced (online bookings, takeaways etc.)

For larger SMEs, choosing a provider is structured and often reviewed regularly at board meetings where ideas would be put forward. Typically an IT Manager or specialist within the organisation would investigate any new solutions or products needed and approve these with a Financial Director or further discuss / approve at meetings.

Smaller SME owners seemed to approach business communications as they would if it was for domestic use. For those running their business from home, the main communication service used was broadband and this was quite often the one already in place for home use (with business expenses calculated as part of the home billing). Therefore, the business owner dealt with the providers themselves (mainly internet/phone integrated providers, with low need for dealing with mobile providers). This seemed to work relatively well, with most automatically choosing or continuing with a domestic service, rather than using a business service. One respondent had enquired with a provider about getting business broadband but was told it was not appropriate for their type of business (selling goods from home). Overall the issues encountered with providers were:

- Lack of connectivity to Wi-Fi with home broadband. This was quite commonly mentioned and was somewhat of a bugbear. The quality of connectivity was paramount to the business and 'embarrassing' if they were unable to run meetings on video conferencing successfully. Quality of connectivity was a key factor in decision making (about whether to switch providers or not, or to actually go ahead and choose a new provider), ahead of cost. Issues seemed most prevalent when small SMEs had first switched provider, with some minor teething problems that were solved with boosters supplied by the provider, or some more drawn out (frustrating) experiences, which also culminated with boosters being provided

- Mobile phone services. Some mentioned issues with poor reception in their home, which was an issue when relying on it for business calls as it was felt to be unprofessional

Experiences with providers since the start of the pandemic

On the whole, SME's perceptions were that providers didn't appear to be doing much differently during the pandemic (this was mainly in the context of communication about internet providers, but also applied to mobile providers), except for businesses which had effectively ceased trading and therefore were contacting providers to freeze services. There were some exceptions to this where there were some low-level mentions of:

- Awareness of 'we're in this together' communications from providers

- Longer wait times when calling providers. Largely there was a *degree* of empathy from SMEs toward the providers for this, but with minor feelings of aggravation particularly as the pandemic went on

Attitudes and considerations when switching provider and how the pandemic has influenced this

In summary, complete reliance on a good internet connection made SMEs in our sample reluctant to switch. Most of the SMEs have been dealing with so many challenges (pandemic and economy related) and their main focus is running the business as best they can – shopping around for the best deal / value for money is really not a priority. However, now this period is passing (i.e. the initial rapid adjustment and subsequent business recovery periods), there is now more time to review and plan ahead (and be less reactive) and focus on reliability and use of appropriate systems for the newer way of working.

When considering switching, SMEs in our sample were mainly considering internet services as opposed to mobile services. There was perhaps more reason to switch with internet services, where problems could arise such as a poor or unreliable service on which businesses really depend on, as opposed to mobile services, where occasional poor reception is less of an issue for the business.

As mentioned, reliability and also customer service (to some extent) far outweigh costs in terms of importance for the SMEs in our sample when choosing and making the decision to stay with a provider (SMEs most often talk about this in relation to internet services where there is more at stake or more to go wrong). When a system is good, it can feel too risky for SMEs to switch and risk having a worse service. Indeed, in our sample, there were some minor regrets from smaller SMES in switching to a reputedly better provider (which they had researched had faster speeds) only to find that they had a worse service initially (which was often later resolved).

As mentioned earlier, switching was not a priority during the pandemic due to other pressing issues involved in keeping businesses operating. As things get back to normality, it appears the pandemic has not significantly changed behaviours or attitudes to switching for the SMEs in our sample – these same behaviours and attitudes exist in the same way as they did pre pandemic.

Climate Change

Sustainability was not spontaneously mentioned. When specifically asked about it there was generally some low-level activity in making small steps where possible, e.g. limiting printing to when necessary.

A respondent at a carbon capture product manufacturer mentioned being very surprised by their understanding of the carbon footprint impact from 'just' sending an email. They said they take sustainability more into account when looking into suppliers of *physical* items, but not in relation to

communications services as yet (she wanted to look into it due to the nature of their business as well, but it wasn't spontaneously mentioned):

"What we provide with regards to the communications and the internet side of things, it's never been raised as of yet. But I am fully aware that we are using suppliers that are coming back with climate pledges, and at the minute that's physical stuff, like - for every delivery they do, they'll do x in return.

I definitely think it's something that is very quickly going to get introduced for the likes of internet providers, but at the minute no, not even for ourselves"

(Carbon capture product manufacturers, 30 employees)

Data sharing

There was low-level concern on data sharing and security within our sample, with isolated cases mentioning:

- One SME (an online retail business) had recently experienced the businesses social media account being hacked which had caused some issues and which had taken months to resolve

- Another company (carbon capture product manufacturer) had had an 'email breach' (where there was some issue with spam emails being received or sent inadvertently) – this was resolved by IT support adjusting firewall protection

There were some concerns about data protection (but only when the respondents were probed). In larger SMEs these would typically be dealt with by IT support (either internal or an external IT support supplier) who stay on top of what is required.

For very 'data sensitive' organisations it is more of an ongoing concern. Specifically this was an NHS organisation where, because of the very sensitive nature of people's health data, data protection concern is even more acute.

Net neutrality

Before being shown a description, none of the SMEs in our sample had heard of the term nor could really think what it was about.

Respondents were then shown the following description of net neutrality in the interview:

> **Net neutrality** is the principle that all internet traffic should be treated equally. There are net neutrality rules, designed to ensure that end users of communications services, including business customers, can access and distribute the information and content they want, when and where they want to via the terminal equipment (e.g. mobile handsets, routers, dongles and other equipment) of their choice.
>
> The principle of net neutrality is based on ensuring that users of the internet can control what they see and do online – not the internet service provider (ISP) that connects them to the internet.
>
> At present the net neutrality rules allow internet service providers a limited amount of control over the management of internet traffic, for example slowing down the delivery of content when the network is busy or coordinating with software providers to ensure the timing of the release of major software updates are scheduled so they do not coincide with each other.

Most were aware of changeable internet speeds throughout the day, particularly smaller SMEs. To some extent respondents liked the idea of everyone having an equal service (they felt this was fair in principle), but some of these also expressed a concern that **if everyone has an equal service then that could result in everyone having an equally sub-standard service.**

For larger SMEs, there was some potential interest in being able to decide how to prioritise the traffic within the business (only when prompted) but not much idea or understanding of how this could work in practice.

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Appendix – objectives and method

Research purpose

The qualitative objectives were to:

1. Provide a high-level understanding of the wider business context for SMEs, particularly with regard to the impact of the pandemic and current economic environment

2. Understand the impact of the pandemic on SMEs' use of and needs from communications services. Within this it sought to understand the impact of fixed and mobile telephony and devices, internet/data connections, remote access to business data/systems, video conferencing messaging services. Have comms become more important? If so, is this likely to be a permanent change? How have the comms providers performed? Are they In line with expectations? What issues have they encountered with customer service?

3. Update Ofcom's understanding of the ways in which SMEs purchase communications services – is it direct from comms providers, in bundles, via service aggregators, or bundled with ICT services? It wanted to look at experiences of and attitudes to switching, particularly how it relates to the pandemic

4. Gain an understanding of the current view on mobile service providers/ market

5. Test understanding of some of the more complex issues that we intend to cover in the quantitative survey – e.g. Net Neutrality

Throughout it was important to understand the impact of fixed and mobile telephony and devices, internet/data connections, remote access to business data/ systems, video conferencing/ messaging services separately where possible.

Research Method

Two stages of qualitative research with 20 telecom decision makers. Stage one used an online messaging platform to cover some ground on the context of their business, their experience of the pandemic and the way in which they purchase communication services. The platform (Recollective) allows respondents to login at a time convenient to them within a certain start and end date. They complete a number of tasks which are made up of open-ended questions to which they can reply using text, video and images. Their answers are completely private in that no other respondents can see their answers. During the research, moderators review their answers and follow-up with further probe questions as and when required to gain additional insight. The second stage used depth interviews (via Zoom) to obtain more detail on this and focussed on views of providers and more complex issues such as net neutrality. The same SME respondents were included at both stages.

The 20 respondents were:

- Primary (sole/joint) telecoms decision makers for their business
- Mix of businesses size (number of employees)
- Mix of business sectors
- Mix of regions
- Mix of users of communications services
- Mix of reliance on communications post-pandemic