

PUBLIC OPINION SURVEY ON
THE FUNCTIONING OF THE TELECOMMUNICATIONS MARKET
AND CONSUMER PREFERENCES

THE REPORT ON SURVEY RESULTS

Warsaw, Gdańsk, 22.12.2017

TABLE OF CONTENTS

3 BASIC INFORMATION ON THE SURVEY

5 SAMPLE CHARACTERISTICS

11 MOBILE TELEPHONY

17 USE OF THE INTERNET

24 USE OF DQS AND FAX

28 THE INTERNET OF THINGS

32 SAFETY ON THE WEB

35 OVER-THE-TOP SERVICES

39 5G NETWORK

42 BIG DATA

45 CLOUD COMPUTING

48 TELECOMMUNICATIONS MARKET
ASSESSMENT

52 CONCLUSION



BASIC INFORMATION



TITLE

Public opinion survey on the functioning of the telecommunications market



CONTRACTING PARTY

Office of Electronic Communications (UKE)



CONTRACTOR

DANAE LLC and Realizacja LLC



SAMPLE SIZE

N=400 institutional costumers



TECHNIQUE

CAPI – computer assisted personal interviewing



LOCATION

survey on a nation-wide level in Poland



PERIOD

from November to December 2017

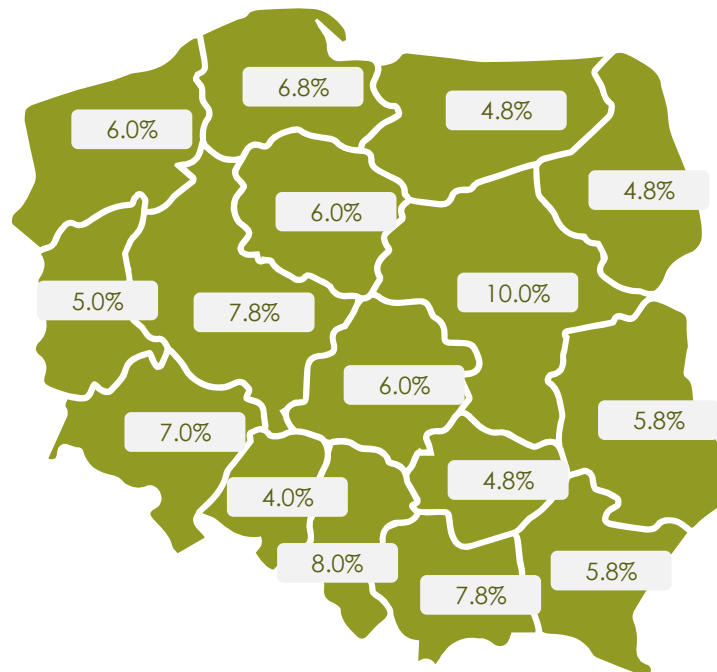


SAMPLE CHARACTERISTICS



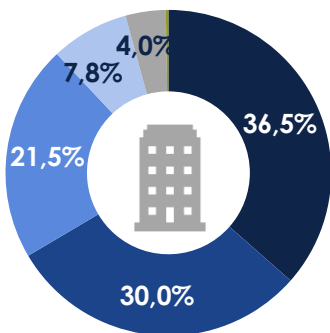
VOIVODESHIP

VOIVODESHIP	%	VOIVODESHIP	%
Lower Silesian	7.0%	Subcarpathian	5.8%
Kuyavian-Pomeranian	6.0%	Podlaskie	4.8%
Lublin	5.8%	Pomeranian	6.8%
Lubusz	5.0%	Silesian	8.0%
Łódź	6.0%	Holy Cross	4.8%
Lesser Poland	7.8%	Warmian-Masurian	4.8%
Masovian	10.0%	Greater Poland	7.8%
Opole	4.0%	West Pomeranian	6.0%



INSTITUTION SIZE

- One person
- From 2 to 9 people
- From 10 to 49 people
- From 50 to 249 people
- 250 and more people
- I don't know, it's hard to say



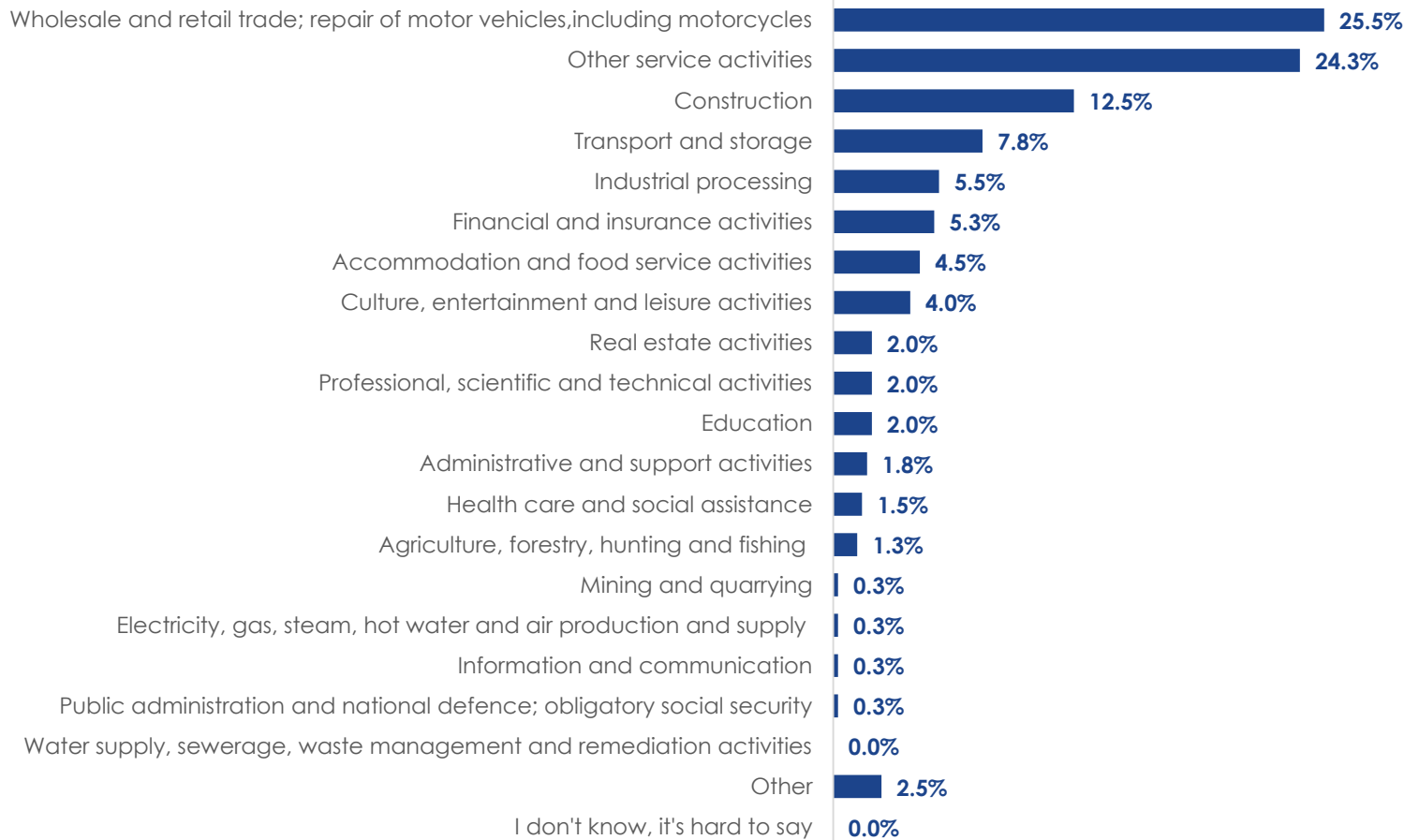
Most participants of the survey are self-employed (36.5%). Nearly every third respondent represented a business entity that employs from 2 to 9 people. The lowest proportion of surveyed individuals were people who acted on behalf of a company which employs more than 250 people (4.0%).

Among voivodeships, the most represented was Masovian (10%), followed by Silesian (8%).

Basis: All respondents N=400



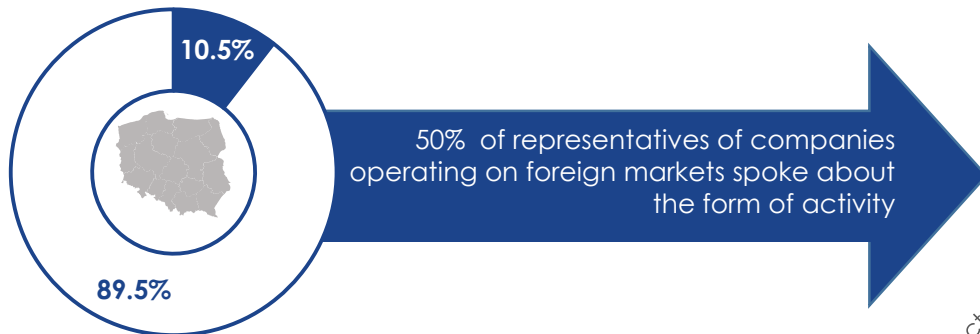
SECTOR OF ACTIVITY



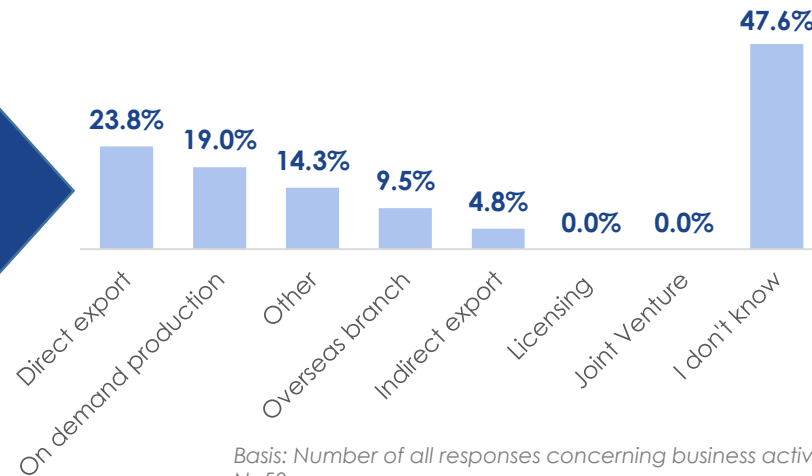
Basis: All respondents, N=400



ACTIVITY MARKET

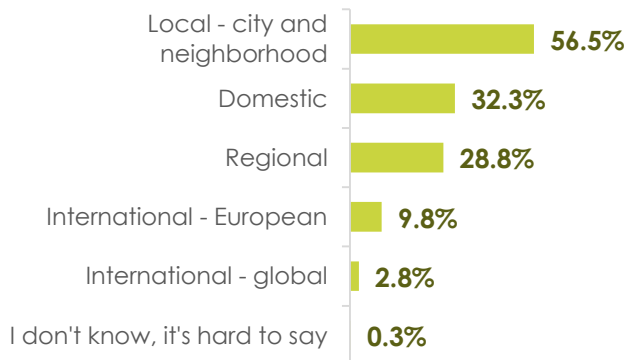


FORM OF ACTIVITY



Basis: Number of all responses concerning business activity, N=50

THE SCOPE OF ACTIVITY



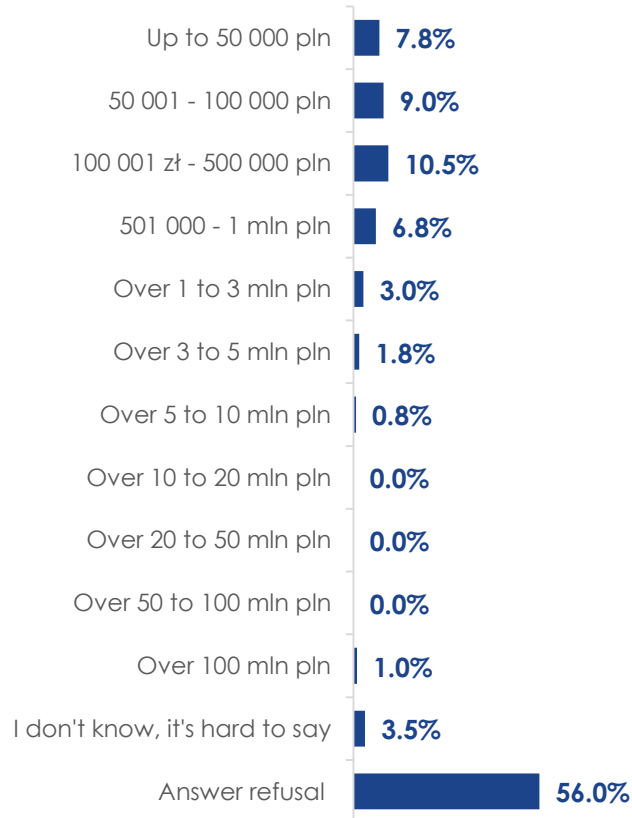
More than half of business entities (56.5%) that were included in the subject matter of this survey, operated on a local market, in the neighborhood. Almost every third respondent declared business entity activity on domestic market (32.3%). Companies operating on the global market - in countries outside the EU - were least represented among surveyed participants - (2.8% responses).

Only 10.5% of organisations operated on foreign markets. Almost every fourth company implemented their activity on the basis of direct export (23.8%).

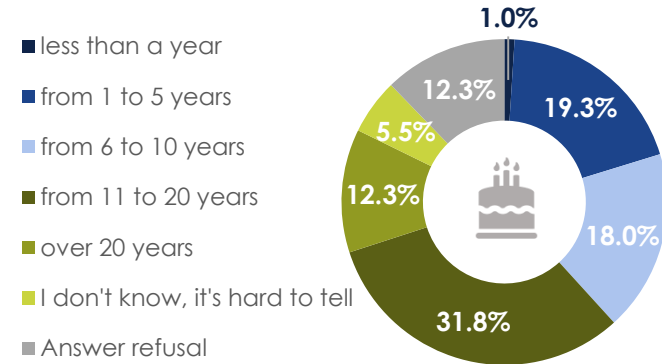
Basis: All respondents, N=400



ORGANISATIONS' TURNOVER



ORGANISATIONS' YEARS OF ESTABLISHMENT



A large part of respondents refused to provide the organisation's turnover (56%).

Among the people who decided to speak on this matter, the largest group was made by organisations with turnover ranging from 100,001 to 500,000 pln (10.5%). None of the surveyed business entities declared turnover from 10 to 100 million PLN.

An average age of organisations represented by respondents was 13 years. Almost every third company operated on the market for more than 20 years. Only 1% of business entities was constituted by companies that functioned on the market for less than a year.

Basis: All respondents, N=400



USE OF SERVICES



Mobile phone

96.2%



Landline phone

19.4%



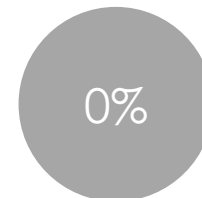
Fixed Internet

42.9%



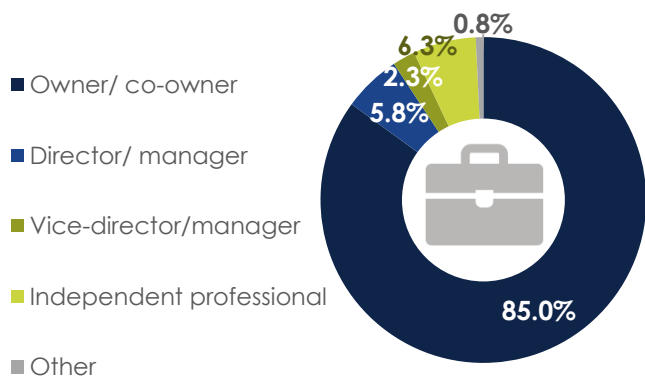
Mobile Internet

37.7%



I don't use any

RESPONDENTS' POSITION



Almost all survey subjects (96%) used mobile phones. Slightly bigger number of respondents declared using fixed Internet (42.9%) than mobile Internet (37.7%).

Participants of this survey most often spoke about their own companies - 85% of respondents were owners or co-owners of business entities.

Basis: All respondents, N=400

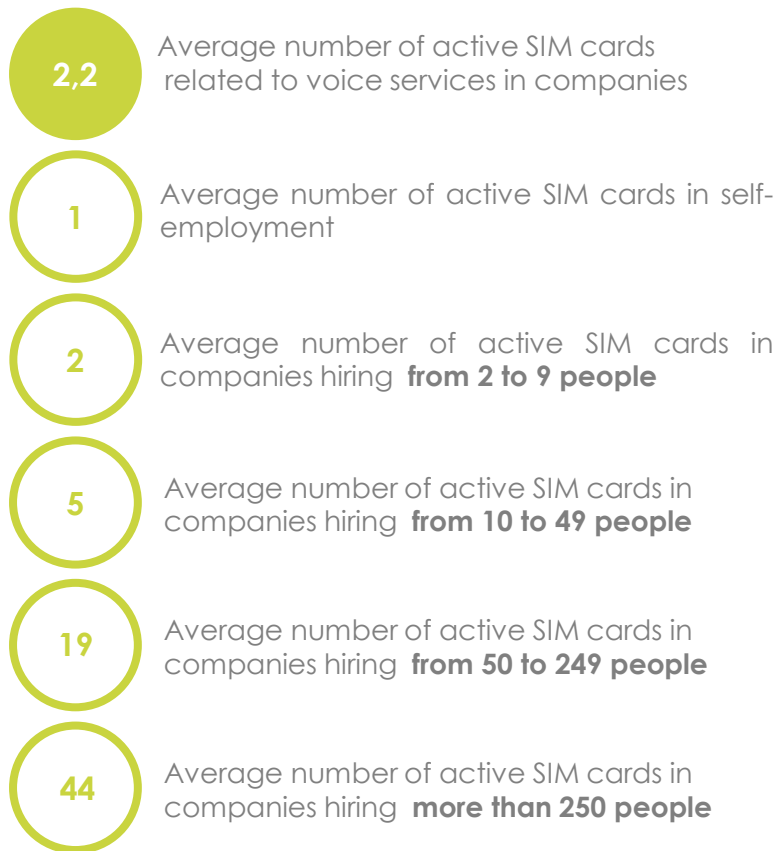
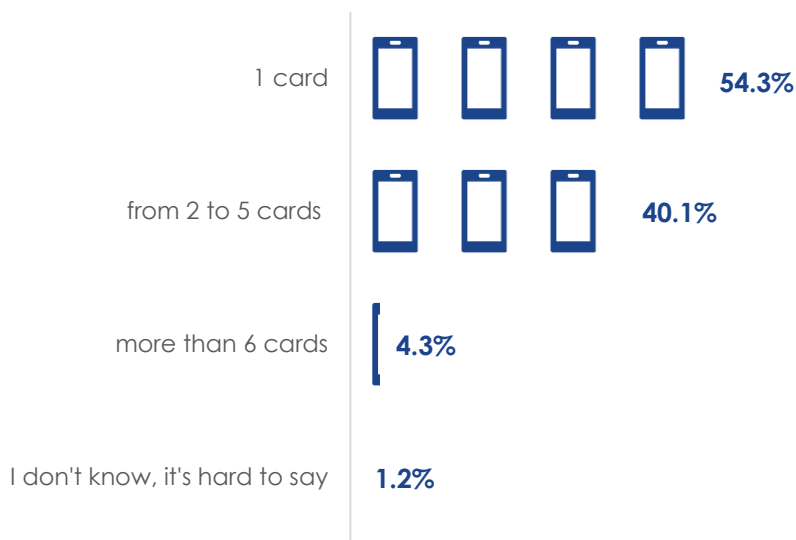


MOBILE TELEPHONY



NUMBER OF ACTIVE SIM CARDS IN BUSINESS

What is the number of active SIM cards related to voice services in your company?

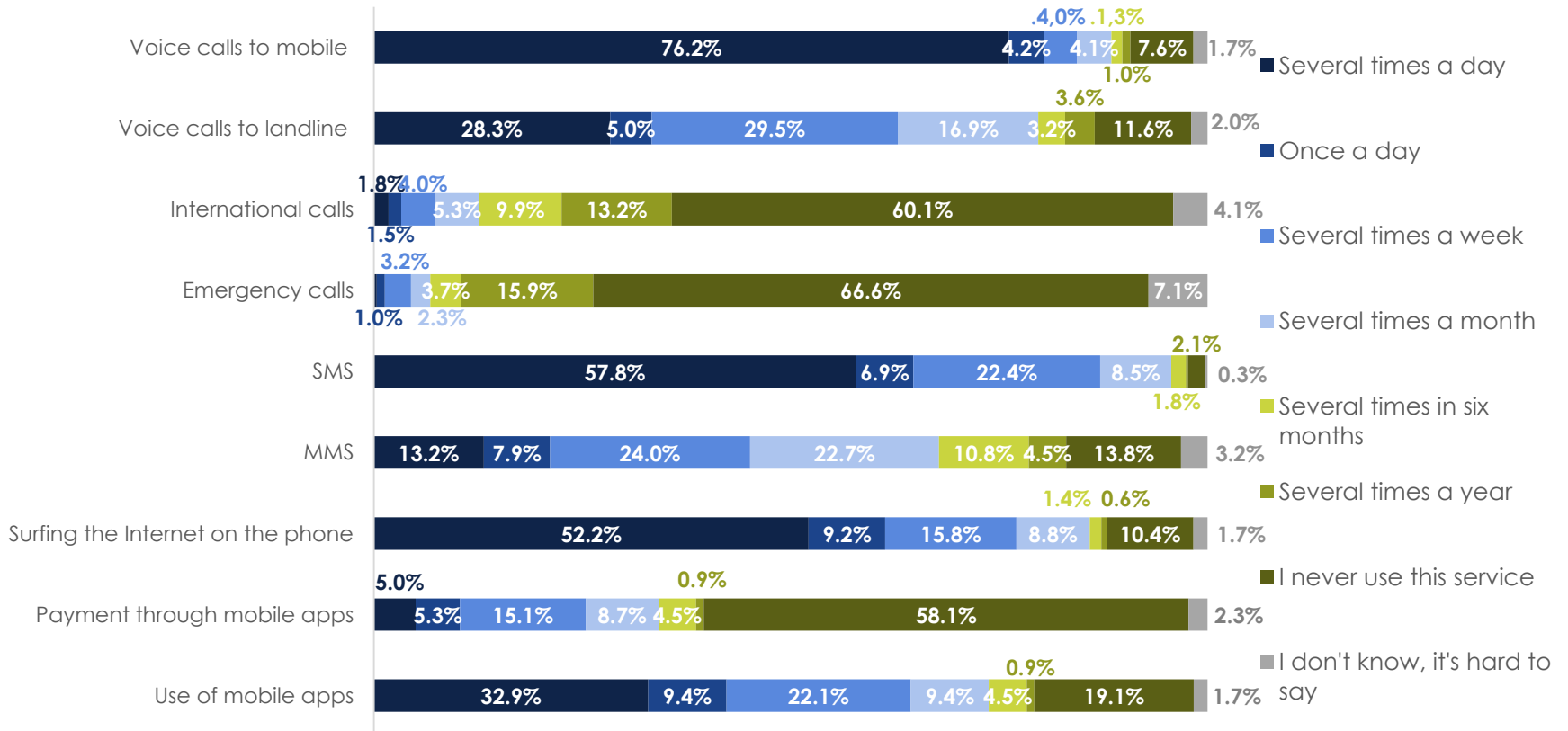


Basis: Companies that use mobile phones, N=384



FREQUENCY OF SERVICE USE

How often in the past year did your company use the following services of mobile telephony?

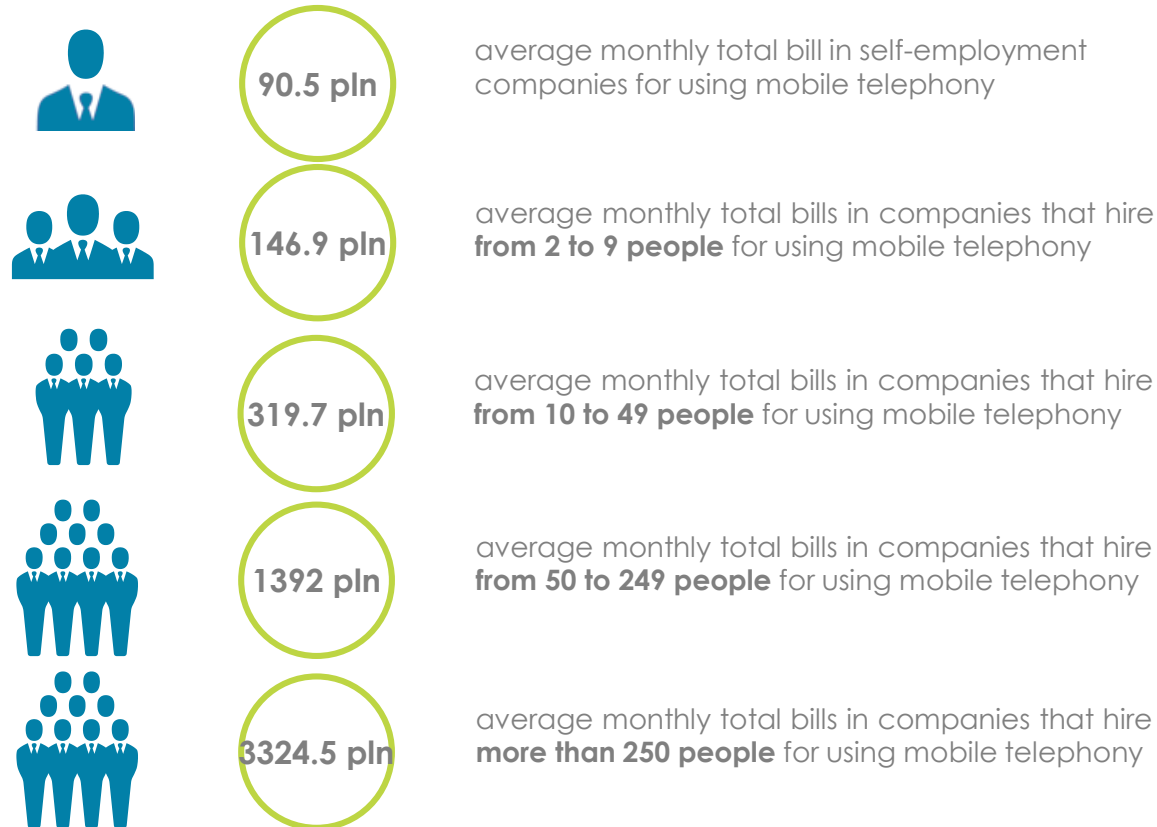


Basis: Companies that use mobile phones, N=385



EXPENSES ON THE USE OF MOBILE TELEPHONY

What is the average total monthly amount of bills in your company for using mobile telephony ?

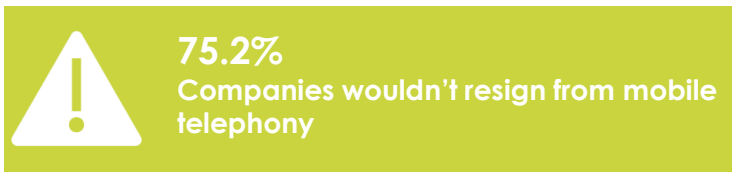


Basis: Companies that use mobile phones, N=385



POSSIBILITY TO RESIGN FROM MOBILE TELEPHONY

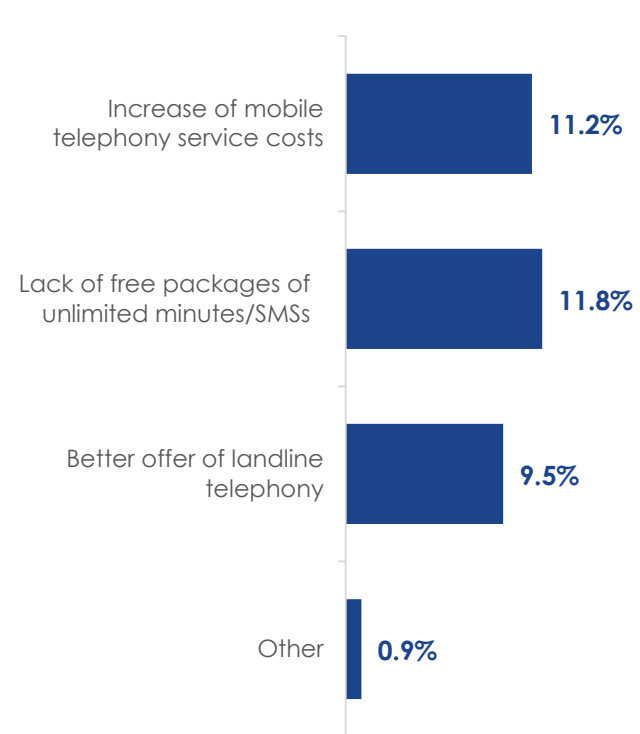
Would your company consider resigning from mobile telephony in favour of fixed-line phones?



A great majority of respondents declared that they would not resign from mobile telephony in favour of fixed-line phones (75.2%).

People who would consider resignation listed the following causes in similar proportions – increase of mobile telephony service costs (11.2%) and lack of free packages of unlimited minutes/ SMS (11.8%).

REASONS FOR RESIGNATION



Basis: Companies that use mobile phones, N=385



USE OF FIXED TELEPHONY

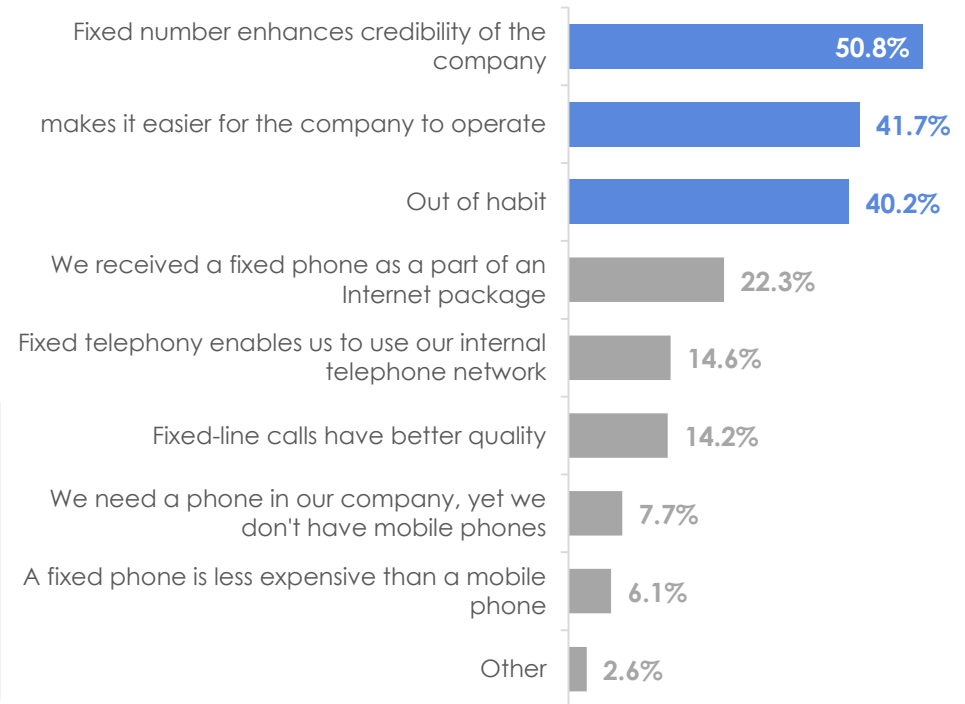
Which of the listed services of fixed telephony does your company use?



According to 50.8% of survey participants fixed telephony makes it easier to operate, but 40.2% including 19.4% of which declare use of fixed telephony. Every second of respondents admits that a fixed number possession enhances prestige and credibility of a company. According to 41.7% of them said that use of a fixed phone is mainly out of habit.

REASONS BEYOND USE

Why does your company use fixed telephony?



Basis: All respondents , N=120

Basis: Companies that use fixed phones, N=120



ACCESS TO THE INTERNET



ACCESS TO THE INTERNET

What type of access to the internet do you have?



Fixed internet

51.3%



Mobile Internet

34.3%



Mobile Internet on the phone

57.0%



Dial-up Internet

0.7%

Most often companies with access to the Internet use mobile Internet on the phone (56.2%) or fixed Internet (51.3%). In addition, every third company has access to mobile Internet.

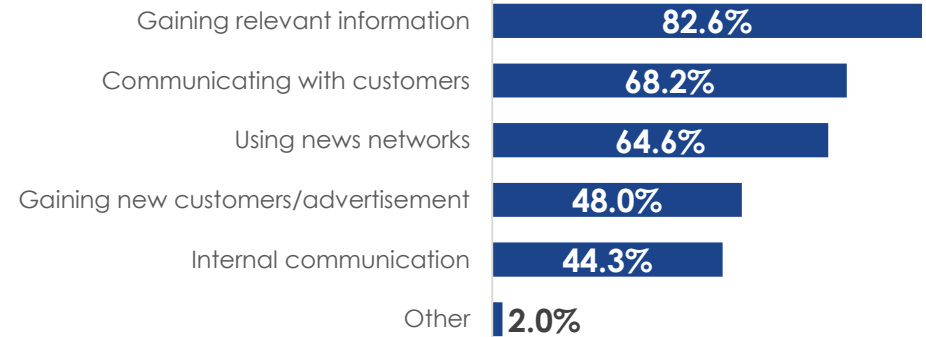
Internet is mainly used to gain relevant information (82.6%), to communicate with customers (68.2%) and to use news networks (64.6%).

The largest group of respondents – 38.7% admitted that Internet is an important tool but only in order to help in day-to-day operations of a company. For 28.4% of participants, access to the Internet is essential for main business activity.

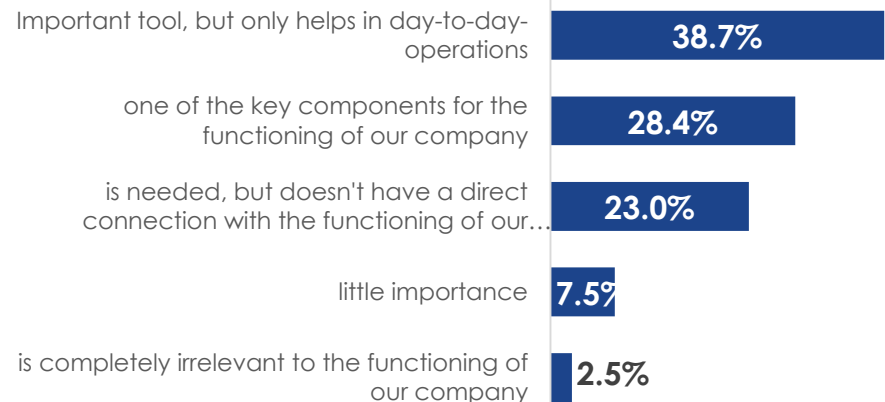
Basis: Companies with access to the Internet N=342

PURPOSE AND IMPORTANCE OF INTERNET USAGE

What is the main purpose of using Internet in your company?



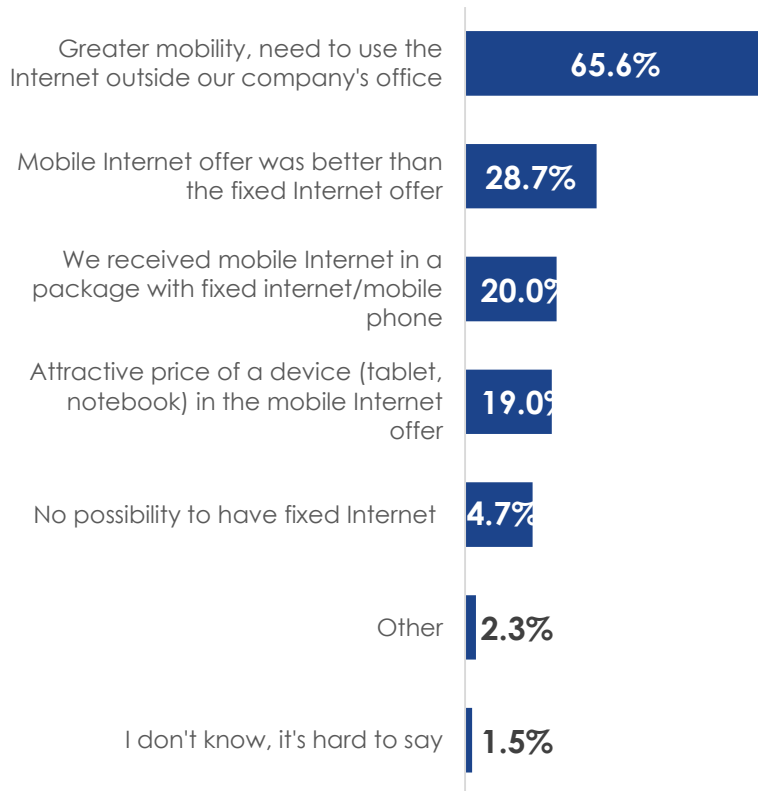
What importance does access to the Internet have for the functioning of your company?





REASONS FOR USING MOBILE INTERNET

Why did your company decide to use mobile Internet?



Access to mobile Internet is used by almost every third company (34.3%).

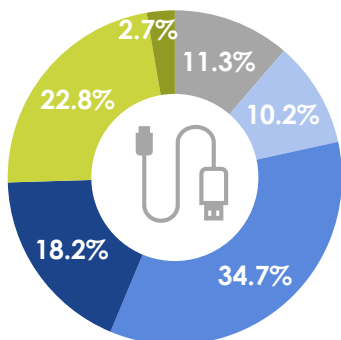
One of the main reasons for using mobile Internet is the need to use it outside the company's office (65.6%). Much less commonly respondents pointed at a better offer when compared to fixed Internet (28.7%), obtaining mobile Internet in a bundle with other telecommunications services (20.0%), or attractive prices of devices (tablet, notebook) in an offer (19.0%). In addition, 14.7% of surveyed individuals listed as a reason lack of possibility to connect fixed Internet.

Basis: Companies that use mobile Internet, N=107



FIXED-LINE INTERNET SPEED

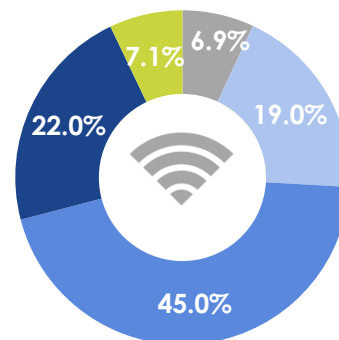
What is the maximum Internet speed according to the contract that is used in your company?



- up to 10 Mb/s,
- 11 - 20 Mb/s,
- 21 - 80 Mb/s,
- 81 - 100 Mb/s,
- 100 - 300 Mb/s,
- 301 - 600 Mb/s,

MOBILE INTERNET SPEED

What is the maximum mobile Internet speed according to the contract that is used in your company?



- up to 10 Mb/s
- 11 - 20 Mb/s
- 21 - 80 Mb/s
- 81 - 100 Mb/s
- 100 - 300 Mb/s
- 301 - 600 Mb/s

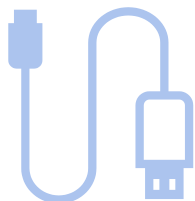
Basis: Companies using fixed Internet, N=107

Basis: Companies using mobile Internet, N=30



FIXED-LINE INTERNET USAGE COSTS

What is the average monthly amount paid for the use of fixed-line Internet in your company?



62 pln

Average monthly total amount paid for the use of mobile telephony services for companies based on self-employment

67pln

Average monthly total amount paid for the use of mobile telephony services for companies that hire **from 2 to 9 people**

83 pln

Average monthly total amount paid for the use of mobile telephony services for companies that hire **from 10 to 49 people**

684 pln

Average monthly total amount paid for the use of mobile telephony services for companies that hire **from 50 to 249 people**

445 pln

Average monthly total amount paid for the use of mobile telephony services for companies that hire **more than 250 people**

MOBILE INTERNET USAGE COSTS

What is the average monthly amount paid for the use of mobile Internet in your company?



56 pln

Average monthly total amount paid for the use of mobile telephony services for companies based on self-employment

79 pln

Average monthly total amount paid for the use of mobile telephony services for companies that hire **from 2 to 9 people**

102 pln

Average monthly total amount paid for the use of mobile telephony services for companies that hire **from 10 to 49 people**

483 pln

Average monthly total amount paid for the use of mobile telephony services for companies that hire **from 50 to 249 people**

6000 pln

Average monthly total amount paid for the use of mobile telephony services for companies that hire **more than 250 people**

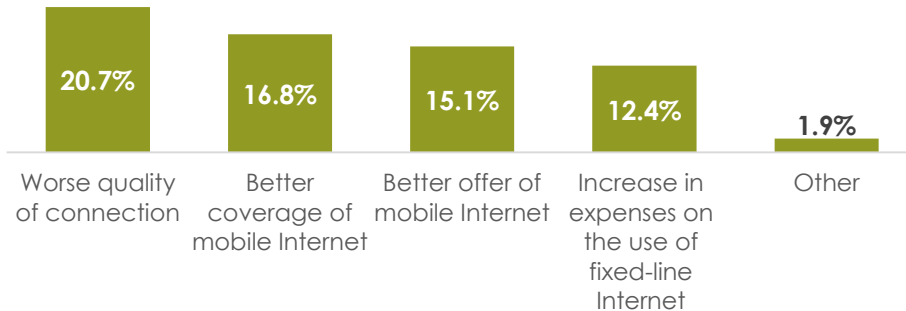
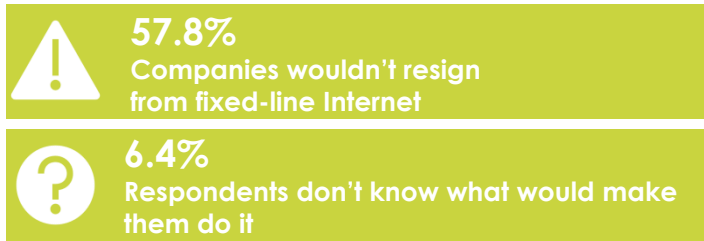
Basis: Companies that use fixed Internet, N=214

Basis: Companies that use mobile Internet, N=107



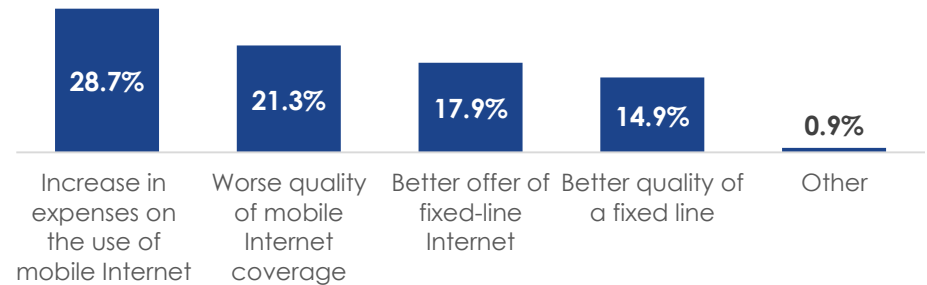
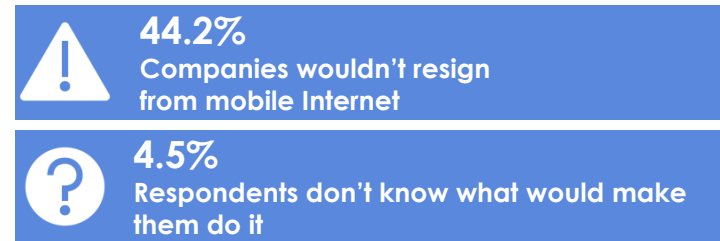
RESIGNATION FROM FIXED-LINE INTERNET

What would make your company resign from the use of fixed-line Internet and switch to mobile Internet?



RESIGNATION FROM MOBILE INTERNET

What would make your company resign from the use of mobile internet and switch to fixed-line Internet?



A large number of companies – 57.8% which have access to fixed-line Internet wouldn't change it for mobile Internet. Nearly every fifth company would consider the change if the quality of a fixed line deteriorated. In addition, 16.8% of participants would be tempted by better coverage of mobile Internet, 15.1% - better offer of mobile Internet and for 12.4% an increase of expenses would be decisive.

Among companies that have access to mobile Internet, 44.2% wouldn't resign from it for fixed Internet. The most popular factor mentioned that could make them resign from mobile Internet was an increase in usage costs.

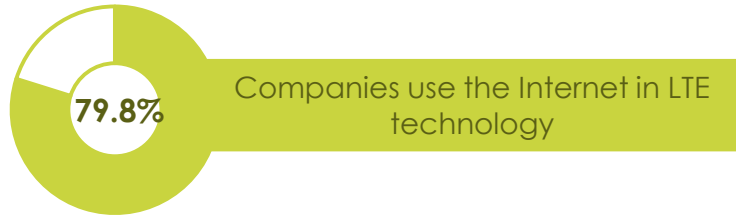
Basis: Companies that use fixed Internet, N=214

Basis: Companies that use mobile Internet, N=107



LTE USAGE

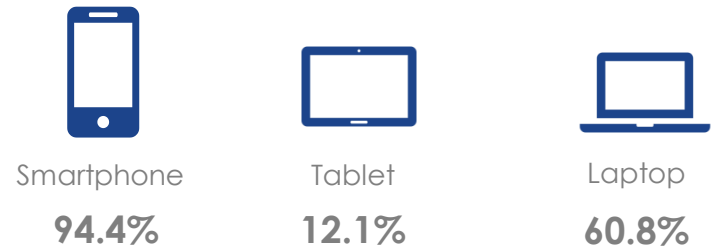
Does your company use the Internet in LTE technology?



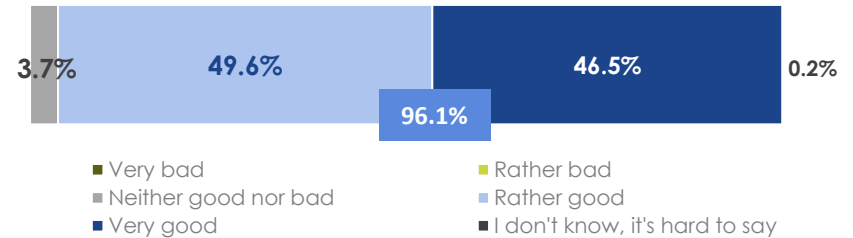
A great majority of companies has access to mobile Internet (including through mobile phones), and they benefit from LTE technology.

Regarding the use of the Internet in LTE technology respondents mainly rely on smartphones (94.4%). However, a laptop is still quite popular (60.8%). Nearly all participants have a good opinion on the quality of mobile Internet that is based on LTE technology (96.1% - total responses "rather good" and "certainly good").

On which devices does your company use the Internet in LTE technology?



How would you rate the quality of mobile Internet services in LTE technology?



Basis: Companies that use mobile Internet, N=218

Basis: companies that use Internet based on LTE technology, N=176

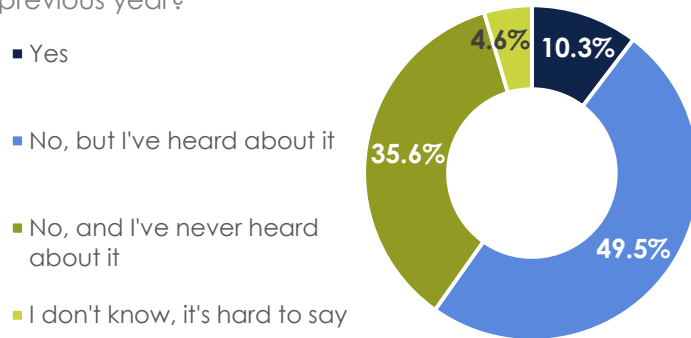


USE OF DQS AND FAX



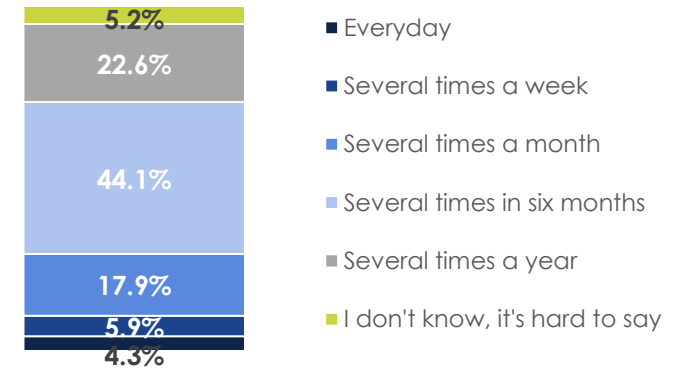
FAMILIARITY AND USE

Did your company reach out to the Nationwide Directory Enquiry Service (118 913) in the previous year?



FREQUENCY OF USE

How often did your company reach out to the Nationwide Directory Enquiry Service in the previous year ?



During the previous year, nearly every tenth company reached out to the Nationwide Directory Enquiry Service (OBN). Generally, these companies used that service several times in six months (44.1%).

Almost every second company heard about the Nationwide Directory Enquiry Service, but didn't reach out to it. At the same time, 35.6% of respondents has never heard about it.

Basis: All respondents, N=400

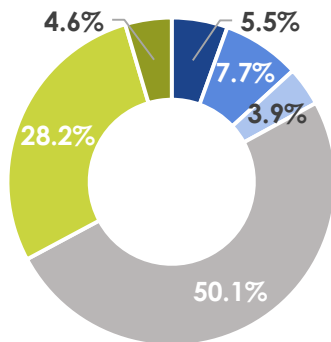
Basis: Companies that reached out to OBN, N=45



USE OF DIRECTORIES

Did your company use the Nationwide Directory in the previous year?

- Yes, we used a book format
- Yes, we used an electronic format
- Yes, we used both formats (book and electronic)
- No, but we've heard about it
- No, I've never heard about it
- I don't know, it's hard to say



In the previous year, 17.0% of companies used the Nationwide Directory Service (OSA). The book format was used by 5.5% of companies, the electronic form – 7.7%, and both formats – by 3.9%. Every second company have heard about it, but haven't used it while 28.2% of surveyed participants have never heard about the directory services.

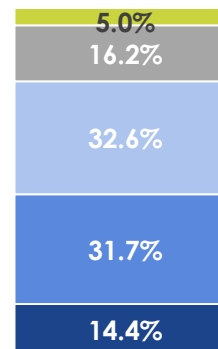
Companies that use directory services do it mainly several times a month (31.7%), or several times in six months (32.6%).

Among companies included in the survey, 44.4% of them would use directories published on the Internet instead of currently available formats. Nonetheless, only 4.2% of companies would use it if this service was paid.

Basis: All respondents, N=400

FREQUENCY AND FORM OF USE

How often did your company use the Nationwide Directory in the previous year?

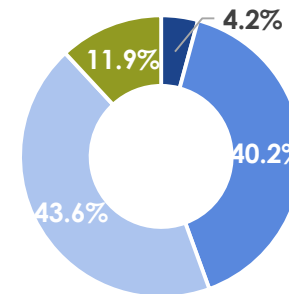


- Everyday
- Several times a week
- Several times a month
- Several times in six months
- Several times a year
- I don't know, it's hard to tell

Basis: Companies that use OSA, N=75

Would you ever use a directory published on the Internet instead of the currently available formats (e.g. classic directory and CD/DVD), if such a directory existed?

- Yes, even if it was paid
- Yes, if it was free
- No
- I don't know, it's hard to say

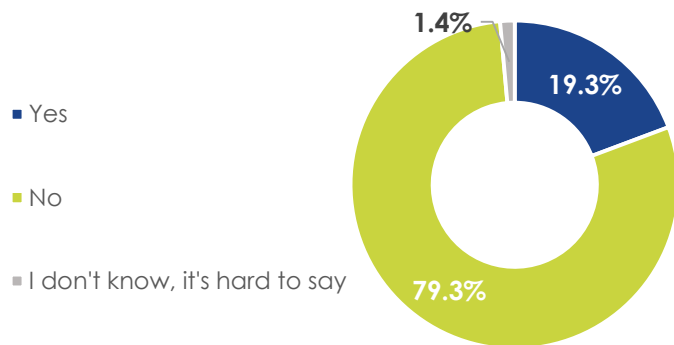


Basis: All respondents, N=400



USAGE

In the past year did your company use fax?



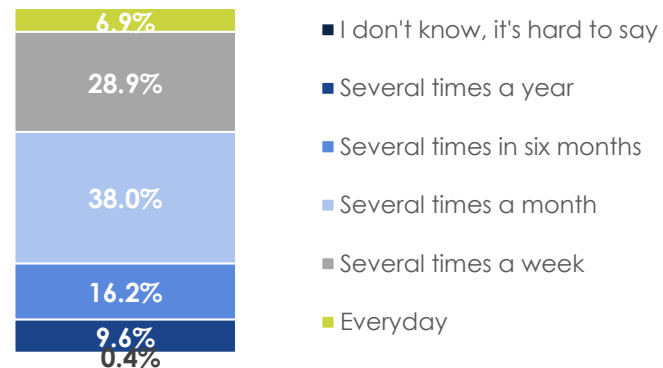
Every fifth company uses fax. Among companies 6.9% use it everyday, 28.9% several times a week and 38.0% several times a month. Every fourth company declares less frequent fax usage (several times in six months 16.2%, several times a year 9.6%).

The vast majority of respondents (89.0%) positively assess the quality of connections by fax.

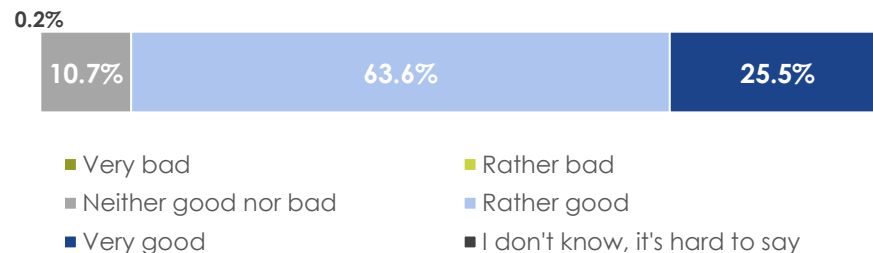
Basis: All respondents, N=400

FREQUENCY AND FORM OF USE

How often did your company use fax in the past year?



How do you assess the quality of connections by fax?



Basis: All respondents whose company uses fax, N=117

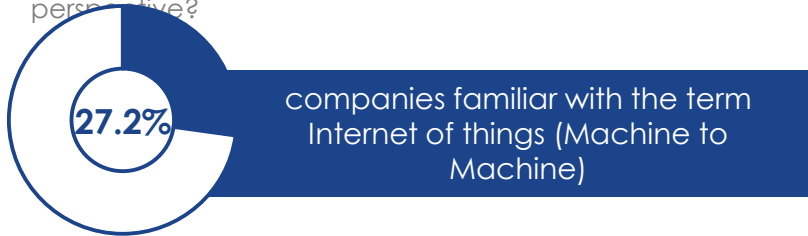


THE INTERNET OF THINGS



USE OF M2M SOLUTIONS

Have you come across the term "the Internet of things" and/or "machine to machine" (M2M) from the company's perspective?



In which areas, do you use "machine 2 machine" solutions?

48.5%



Transport and logistics

40.4%



Monitoring and protection of supplies

N= Number of respondents implementing M2M solutions, N= 26

Does your company benefit from these or similar solutions?



27.2% of respondents were familiar with the term: the Internet of things.

Among the companies that have access to the Internet 3.1% use such or similar solutions. Those business entities benefit from "machine to machine" solutions most often in the area of transport and logistics, as well as monitoring and protection of supplies. This is followed by trade area (18.4%) and M2M implementation in the office (13.4%) and next by production, distribution, administration and industry.



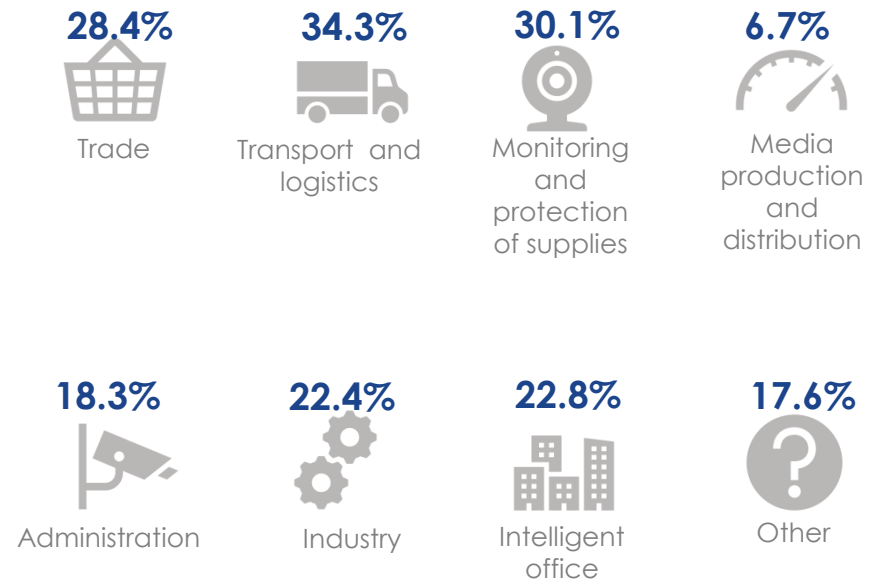
PLANS RELATED TO M2M

Do you as a company, plan to use such solutions in the future?



Only 4.9% of respondents consider using "machine to machine" solutions as regards their company in the future. When questioned about the areas where such solutions could be implemented, their most common answers were transport and logistics, as well as monitoring and protection of supplies.

In which areas do you consider using "machine to machine" solutions?



Basis: companies that plan IoT implementation, N=24






BENEFITS

What benefits do you get from implementation of such solutions?


 **100%** notice the benefits related to use of the Internet of things in a company

Basis: All respondents, N=19

- Greater sense of control over devices 
- Saving time 
- Better customization of services to needs 

RISKS

What risks do you associate with using the "Internet of things"/"machine to machine" solutions?

 **30%** notice the risks related to the use of the Internet of things in a company

Basis: All respondents, N=19

- Attacks of third parties on devices with such solutions 
- Reduced sense of security 
- Lower sense of privacy 

Among business entities 19 respondents use "machine to machine" solutions. In every third case, as part of the purchased subscription to the "Internet of things" services, an additional package of data transmission is included. Play is the operator that most often provides such solutions. Representatives of the companies were asked about the benefits and risks regarding the Internet of things. All admitted that they noticed the benefits and only 5 of them saw the risks. As regards the benefits, they saw a greater sense of control over devices, saving time, and better customization of services to the needs.

Basis: All respondents that see the benefits N=19

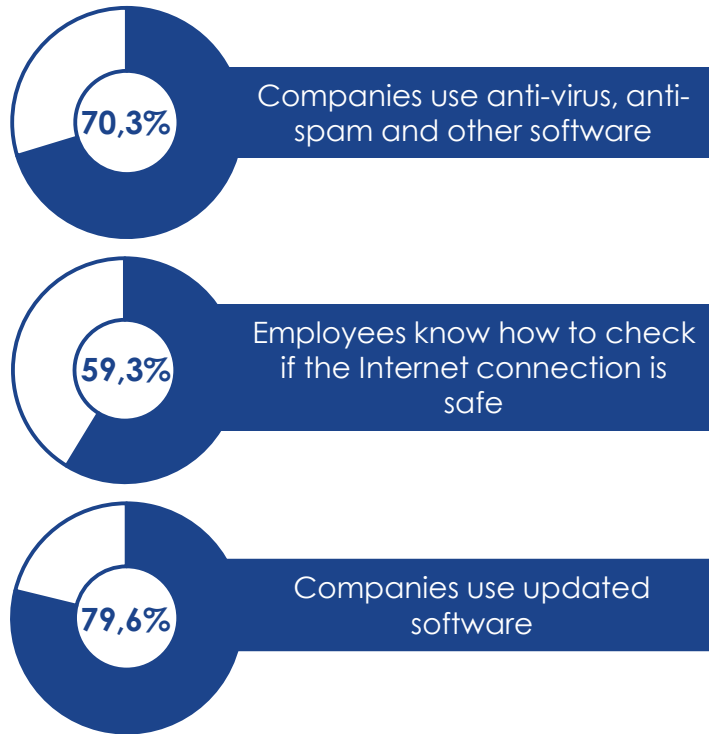
Basis: All respondents that see the risks N=5



SAFETY ON THE WEB



SAFETY ON THE WEB



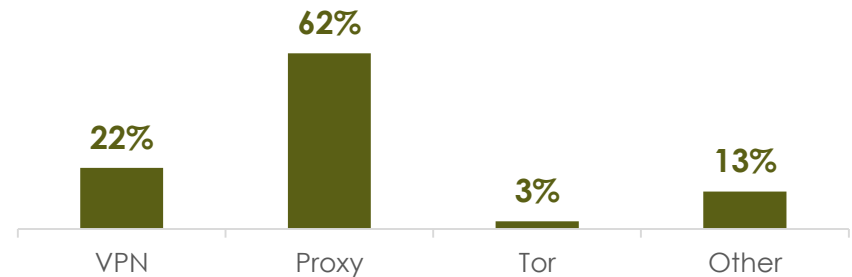
Almost three quarters of companies involved in the survey use anti-virus, anti-spy software, or other software intended for similar purposes, but only slightly less than 60% of employees know how to check whether the Internet connection is safe. Nearly 80% of companies involved, confirmed the use of updated software. In only ¼ of companies solutions that improve the level of privacy on the web are applied. Most common type of such solutions is Proxy (62%), VPN is considerably less used (22%), as is Tor (3%). 13% of all companies that used solutions for improvement of the level of privacy on the web, used other solutions that weren't mentioned above.

Basis: All companies that use the Internet N=342

PRIVACY



What solutions that enhance the level of privacy on the Internet do you use?

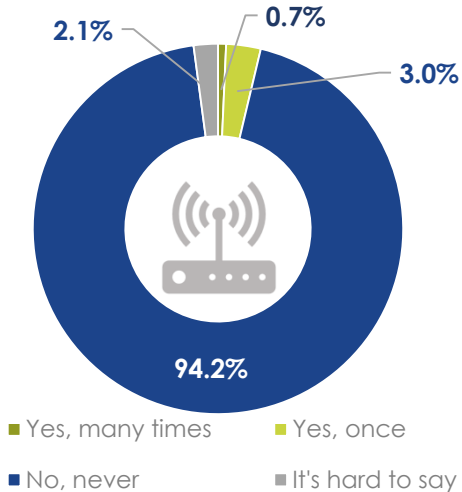


Basis: All companies that implement solutions enhancing the level of privacy on the web N=88



PROVISION OF DATA

Have you ever been a victim of abuse related to data you had provided on the web?



A vast majority of respondents have never become victim of an abuse related to data provided by them (94.2%). Only 2.2% of those surveyed companies came across an attempt at data extortion in the previous year. Such extortion attempt concerned employees in 45% of cases, customers in 39% of cases and in 16% of the cases both employees and customers. Less than 1 out of 10 surveyed companies hire a person responsible for network security on the web and protection of company-related data.

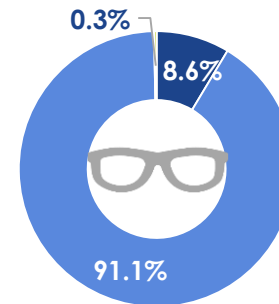
DATA EXTORTION

Were there in the past year any attempts at data extortion in your company regarding personal data of both employees and customers?



Basis: All companies that use the Internet, N=342

Does your company hire people responsible for network security and data protection?



■ Yes ■ No ■ It's hard to tell

Basis: All companies that use the Internet, N=342



OVER-THE-TOP SERVICES



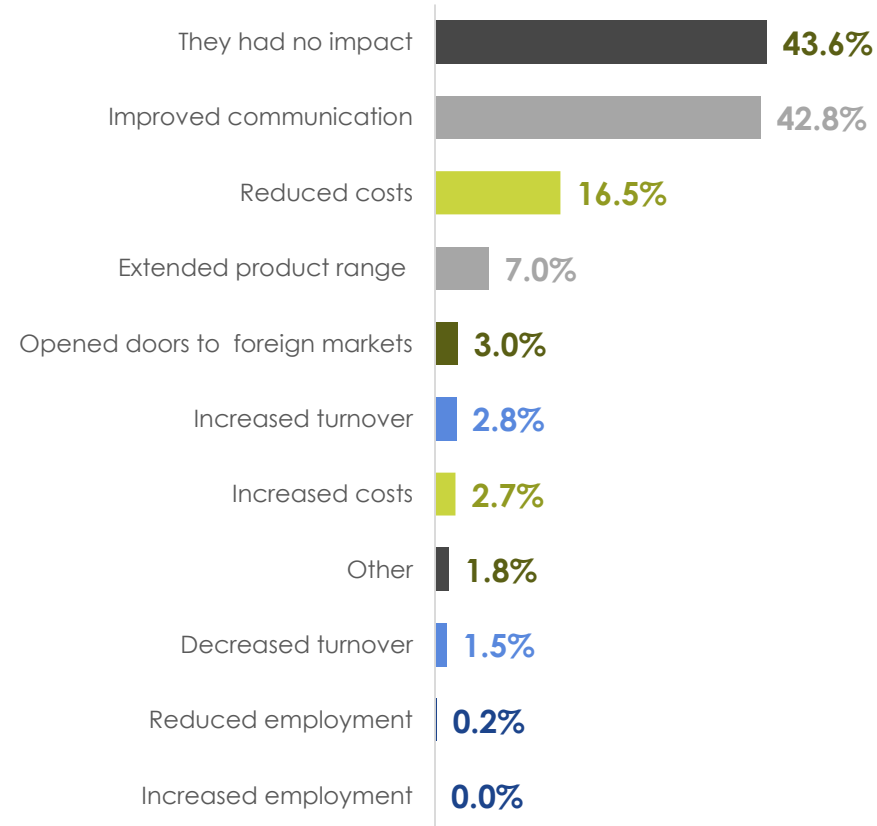
OVER-THE-TOP SERVICES

Does your company use "Over-The-Top" services?



Almost half of respondents admitted that the development of OTT services improved communication in their company (42.8%), but at the same time, a similar number of respondents thought that OTT services had no impact on the functioning of their company. 16.5% of participants pointed out that OTT services had reduced costs, and 7% confirmed they had helped them to extend the product range.

How did OTT services impact your company ?



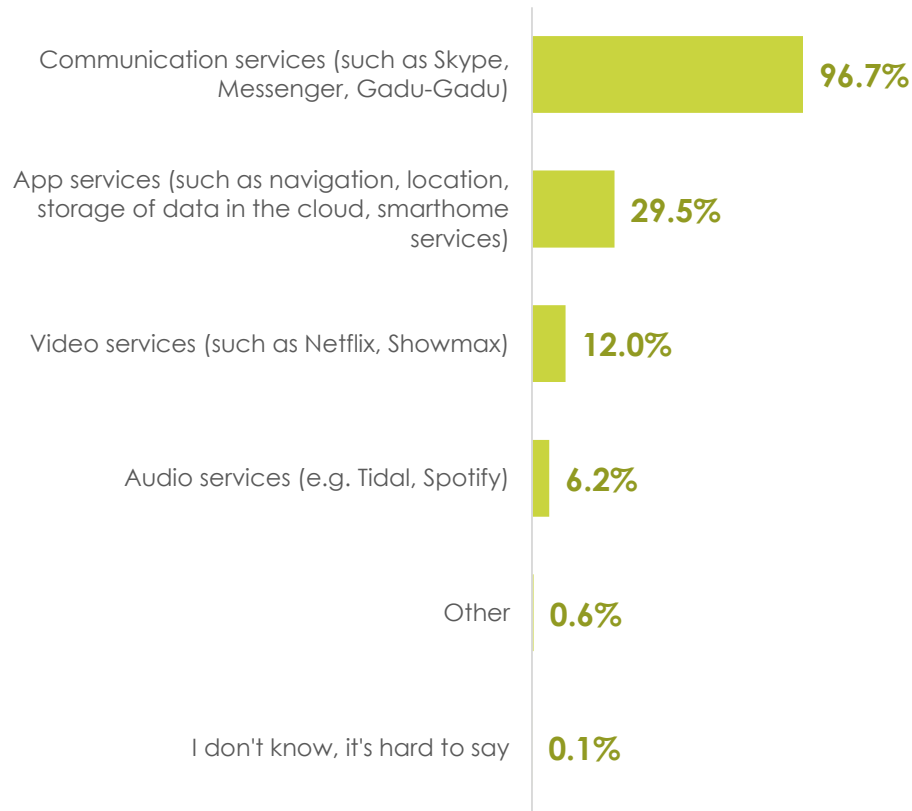
Basis: All companies that use the internet, N=342

Basis: All companies that use OTT services N=120



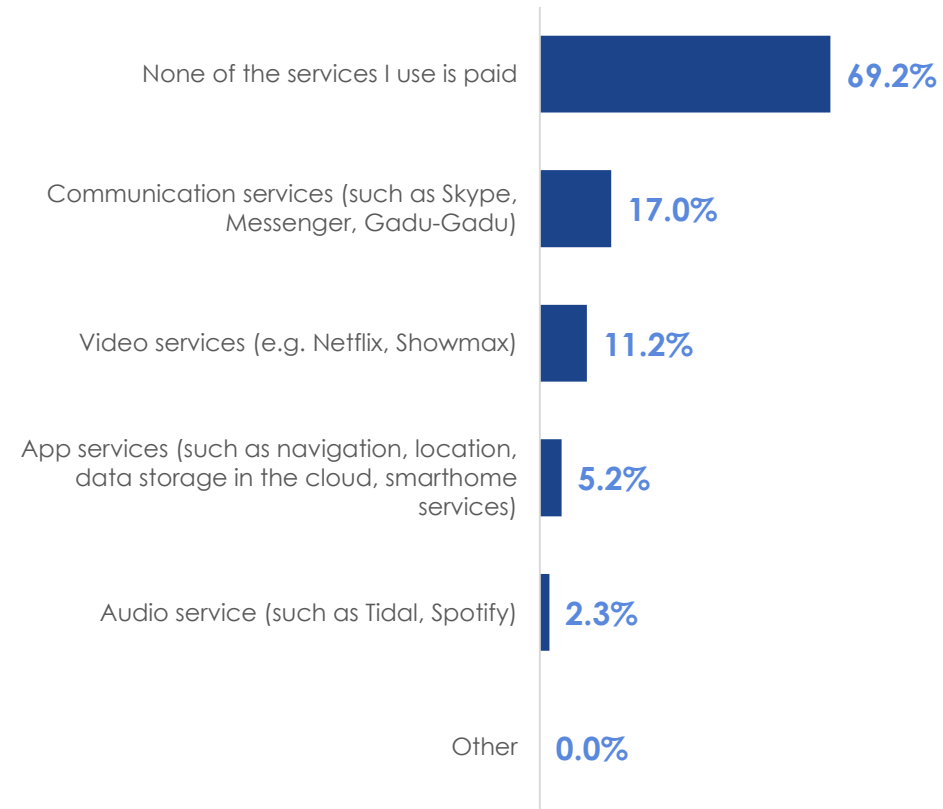
USE IN COMPANY

Which Over-The-Top services do you use?



PAID SERVICES IN COMPANY

Which of the OTT services you use in your company are paid (select a category if at least one service is paid)?



Basis: All companies that use OTT services N=120



OVER-THE-TOP SERVICES

Does your company consider using such services in the future ?



Basis: All companies that don't use OTT services , N=217

Only 9 individuals declared that they would consider using OTT services. Respondents listed communication and app services. Single individuals indicated other services.



Communication services
20.5%



App services
25%

Basis: All companies that intend to use OTT services, N=9

RESIGNATION FROM TELECOMMUNICATIONS SERVICES

Would your company be able to resign from telecommunications services in order to use OTT solutions instead?



- Certainly no
- Probably no
- Neither yes nor no
- Probably yes
- Certainly yes

Basis: All companies that use OTT services N=120

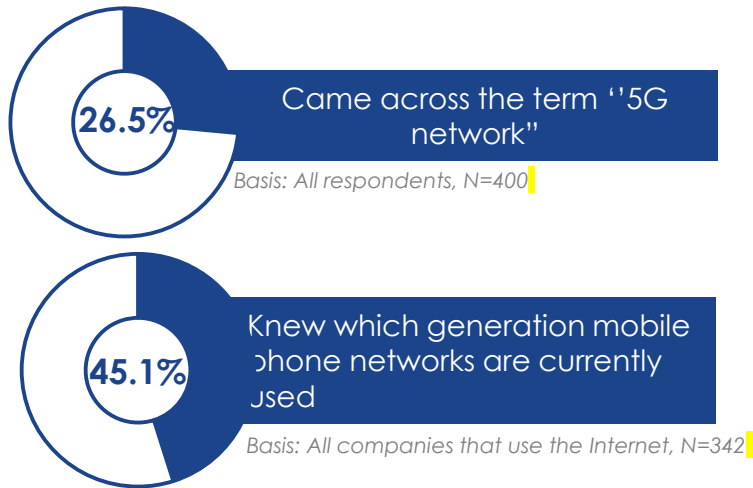
Only 2.0% of companies consider using OTT services in the future. Respondents indicated communication and app services. Single individuals mentioned other services.

None of the people involved in this survey, who works in a company that already uses OTT services, could certainly agree to resign from telecommunications services in favour of OTT services in a company. Nearly half of respondents (42.1%) confirmed that their company would not resign.



5G NETWORK

5G NETWORK

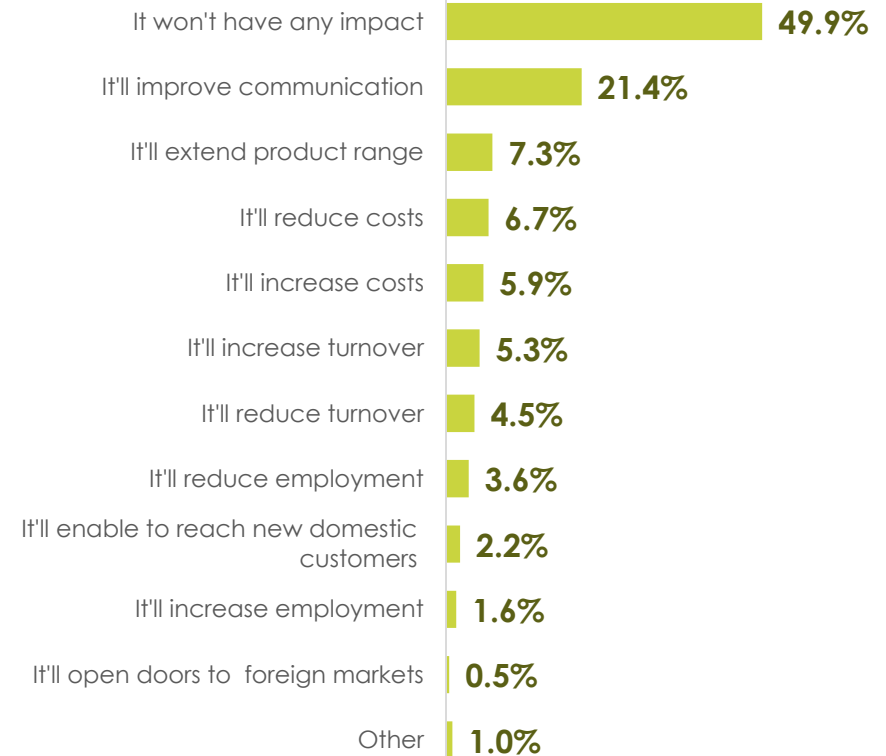


26.5% of respondents are familiar with the term "5G network" while 45.1% of participants know which generation mobile phone network is currently used.

Nearly half (49.9%) of surveyed individuals declared that 5G network development would have no impact on company's growth.

IMPACT OF 5G NETWORK DEVELOPMENT

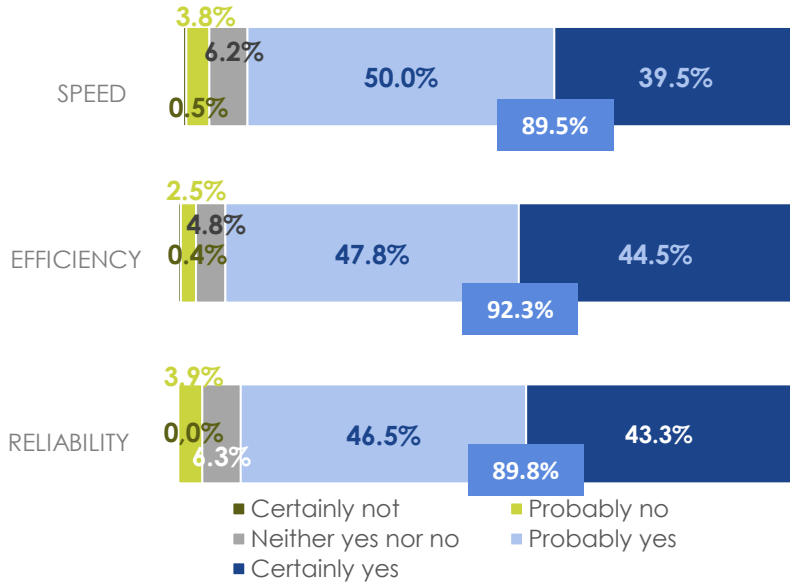
How would you assess the impact of 5G network development on your company ?



Basis: All respondents that use the Internet, N=342

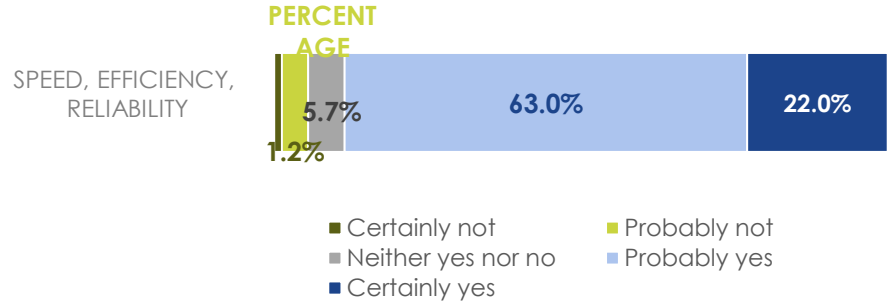
TODAY

Are current Internet access parameters used in your company sufficient to run your business?



TOMORROW

Are current Internet access parameters (speed, efficiency, reliability) sufficient to run your company in the forthcoming years in your opinion?



A vast majority of surveyed individuals think that current parameters of access to the Internet used in their company are good enough to run business.

A significant proportion of respondents (85.0%) indicate that current parameters of access to the Internet used in their company are good enough to run business in the forthcoming years.

Basis: All companies that use the Internet, N=342



BIG DATA



FAMILIARITY

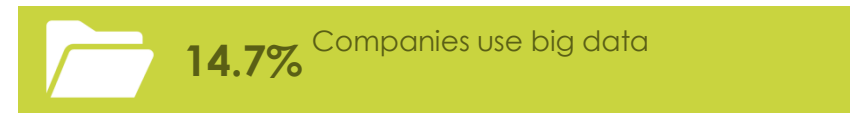
From your company's perspective does the "Big Data" term sound familiar?



18.4% of respondents have heard the term 'big data'. Out of all companies that have access to the Internet, only 14.7% use Big Data. Far more common is possession of their own infrastructure (10.9% of companies), and 3.8% of business entities make use of external infrastructure.

USE

Do you use big data in your company?



Basis: All respondents N=400

Basis: All companies that use the Internet, N=342









BENEFITS

Which benefits do you associate with Big Data services in your company?

45.6% notice benefits emerging from Big Data use in their companies



Basis: all companies that use Big Data, N=65

- 49.1%** Increase of final customers satisfaction understanding their needs 
- 40.4%** Management system improvement in company 
- 23.6%** More detailed analysis of products and services 
- 31.1%** Reduced costs 
- 41.9%** Data reliability 
- 39.0%** Precise planning of the company strategy 

Basis: All companies that notice benefits, N=27

RISKS

Which potential risks associated with Big Data do you see for your company?

1.4% notice risks associated with Big Data use in their companies



Basis: All companies that use Big Data, N=65

Almost half of respondents (45.6%) that work for companies using Big Data see the benefits emerging from it. Most commonly they mention an increase of final customers satisfaction and understanding their needs (49.1%), followed by data reliability (41.9%) and company's management system improvement (40.4%). Only 1.4% of them notice the risks related to Big Data.



CLOUD COMPUTING



FAMILIARITY

Does the term cloud computing sound familiar from your company's perspective ?

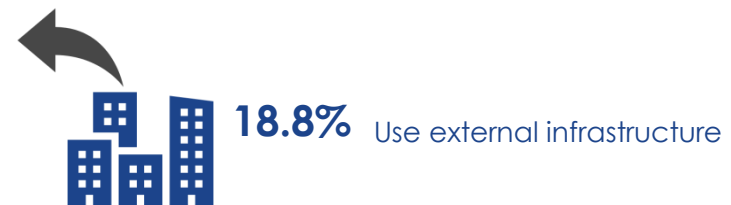


Part of respondents (35.9%) has heard the term "cloud computing"

Out of the companies that use the Internet, 30.1% of them also use cloud computing. The majority of companies support themselves with external infrastructure (18.8% of indications).

USE

Do you use cloud computing in your company?



Basis: All companies that use the Internet N=342



BENEFITS

What benefits do you see emerging from cloud computing from your company's perspective?

70.4% notice the benefits of cloud computing

Basis: All companies that process data in the cloud, N=83

- 56.9%** Access from every computer connected to the network and possibility of sharing data
- 65.5%** Protection from the loss of information
- 33.3%** Cost savings
- 25.1%** Day-to-day process monitoring
- 36.6%** Efficiency and reliability
- 0.6%** Other



RISKS

What risks do you see emerging from cloud computing from your company's perspective?

23.3% notice the risks associated with cloud computing

Basis: All companies that process data in the cloud, N=83

- 65.4%** Risk of data leakage due to hacker break-ins
- 50.6%** Risk of data leakage due to computer failure
- 55.6%** Potential access to data by service owners or third parties
- 37.6%** Risk concerning privacy and safety of the cloud related to insufficient legal regulation of this matter
- 18.7%** Varied level of availability of services in the cloud depending on its operator



Basis: All companies that see the benefits, N=59

Basis: All companies that see the risks; N=19

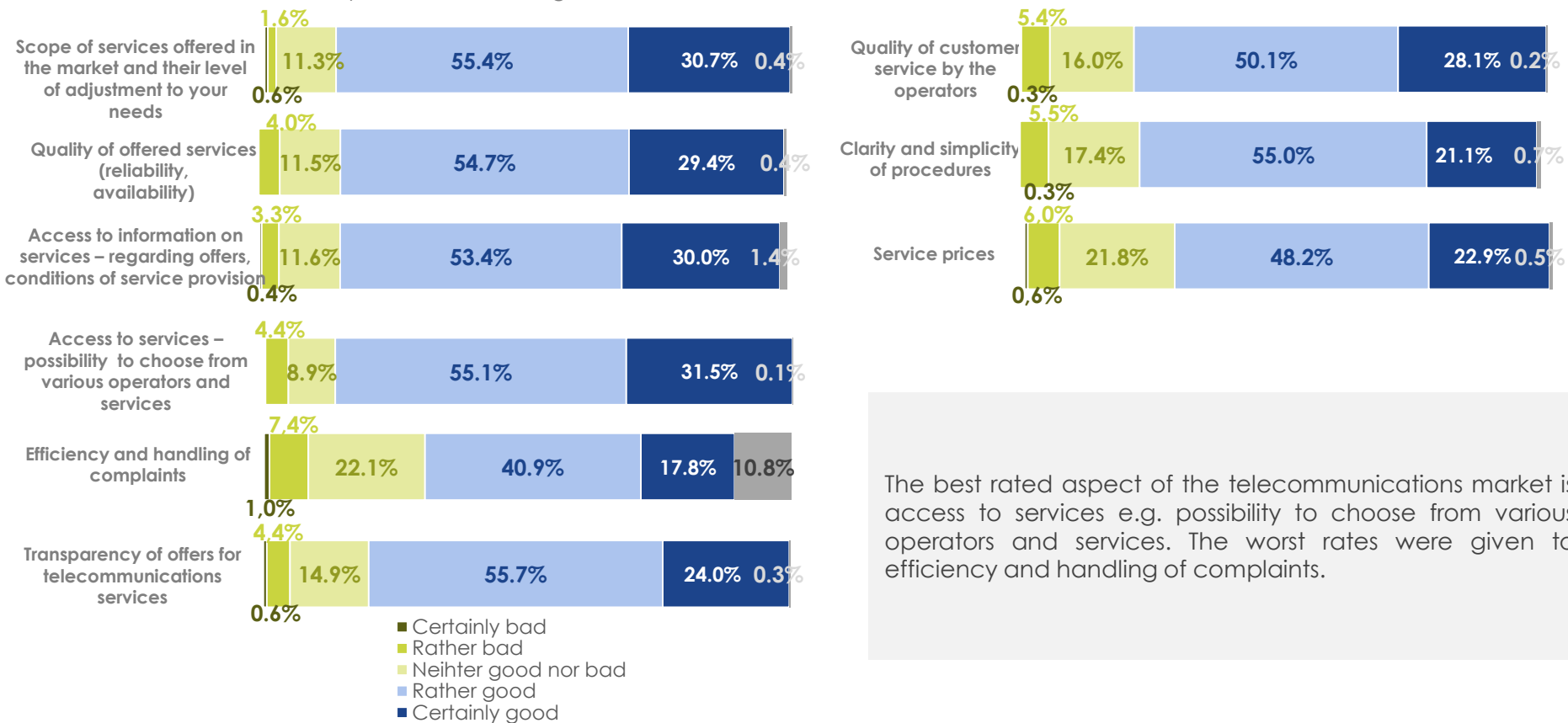


TELECOMMUNICATIONS MARKET ASSESSMENT



ASSESSMENT OF VARIOUS ASPECTS OF THE TELECOMMUNICATIONS MARKET IN POLAND

Please assess various aspects of functioning of the telecommunications market in Poland



The best rated aspect of the telecommunications market is access to services e.g. possibility to choose from various operators and services. The worst rates were given to efficiency and handling of complaints.

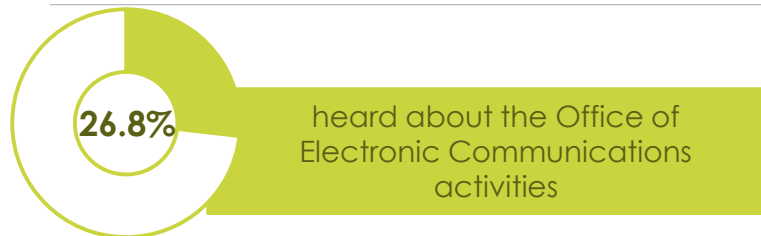
Basis: All respondents, N=400



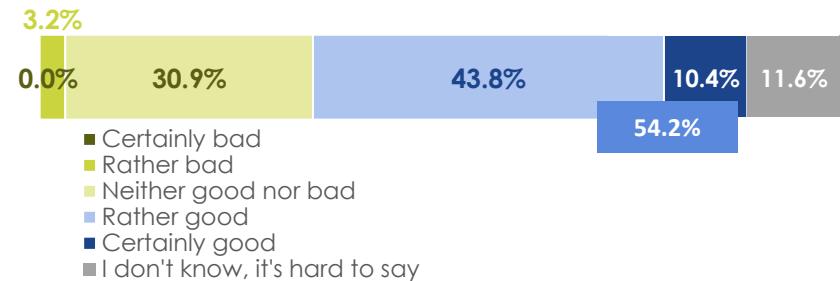
TELECOMMUNICATIONS SERVICES MARKET



OFFICE OF ELECTRONIC COMMUNICATIONS



How would you rate previous activities of the Office of Electronic Communications?



Basis: All respondents who heard about UKE activities, N=113

Every fifth respondent (21.1%) noticed positive changes that took place on the telecommunications market in the previous year. Negative changes were witnessed by 4.5% of participants.

26.8% of respondents heard about the Office of Electronic Communications. This institution collected numerous positive rates (54.2% – total number of "rather good" and certainly good responses). Number of dissatisfied individuals regarding the functioning of this institution amounted to 3.2%.

Basis: All respondents , N=400



POSITIVES



What positive changes in the telecommunications market did you notice in the previous year?



Basis: All respondents who noticed positives N=89

NEGATIVES



Which negative changes in the telecommunications market did you notice in the previous year?

Only 4.5% of respondents observed negative changes in the telecommunication services market in the previous year. This number is reflected by 18 respondents.

Most commonly noticed negative change was increase of prices (60.4%).

Basis: All respondents who noticed negatives, N=1012



CONCLUSION



MOBILE TELEPHONY



96.2% of respondents use mobile phones. In more than half of all cases (54.3%) this involves one active SIM card. On average, there are two active SIM cards per company.

76.2% of respondents say that they make voice calls several times a day. Over half of surveyed individuals send text messages and use the Internet several times a day. International and emergency calls are the least popular options.

A great majority of surveyed individuals declared that their company would not resign from mobile telephony in favour of fixed-line telephony (75.2%).

People who would consider this option, in similar proportions mentioned the following reasons: increase of costs related to the use of mobile telephony (11.2%), and no packages concerning free and unlimited minutes/text messages (11.8%).

According to 50.8% of participants, the use of landline phones makes it easier for the companies to function. 40.2% of surveyed, and 19,4% of companies representatives declared to use landline phones. Every second participant admitted that a fixed-line phone number increased prestige and credibility of a company. According to 41.7% of respondents landline phones are used out of habit.



ACCESS TO THE INTERNET



Companies that have access to the Internet mainly use it via a telephone (56.2%) and fixed web connection (51.3%). In addition, every third company has access to mobile Internet.

Internet is mainly used to collect relevant information (82.6%), communicate with customers (68.2%) and visit news networks (64.6%).

The largest number of respondents – 38.7% admitted that Internet is an important tool, but only in order to help in day-to-day operations of a company. In the opinion of 28.4% participants access to the Internet is essential for main business activity.

57.8% of companies that have a fixed web connection would not resign from it in favour of mobile Internet. Nearly every fifth company would consider such an option if the quality of the Internet connection decreased.

Among companies that have access to mobile Internet, 44.2% would not resign from mobile internet in favour of fixed web connection.

A great majority of companies that have access to mobile Internet (including through a mobile phone) use LTE technology.

In order to use mobile Internet in LTE technology respondents mainly use smartphones (94.4%), but laptops are also quite popular (60.8%).



THE INTERNET OF THINGS



27.2% of respondents are familiar with the term: the Internet of Things.

Among companies that have access to the Internet – 3.1% apply those or similar solutions. Such companies benefit from "machine to machine" solutions, mostly in transport and logistics, as well as monitoring and storage protection.

Only 4.9% of responding individuals consider the use of "machine to machine" by their company in the future. When asked about potential scope of application of this solution, they most often pointed at transport and logistics.

Among surveyed companies, 19 use M2M solutions. In every third case as part of the purchased subscription to the "Internet of things" services, an additional package of data transmission is included. Play is the operator that most often provides such solutions.

USE OF DQS AND FAX



Nearly every tenth company reached out to the Nationwide Directory Enquiry Service in the past year. Those companies mainly used that service several times during six months (44.1%).

Almost every second surveyed company heard about the Nationwide Directory Enquiry Service, but never reached out to it. At the same time, 35.6% of respondents never heard about this service.

17.0% of companies used the Nationwide Directory Service (OSA) in the past year. They did it mostly several times a month (31.7%), or several times during six months (32.6%).

Nearly every fifth company uses fax. 38.0% out of these companies do that several times a month.



SAFETY ON THE WEB



Almost three quarters of companies in this survey use anti-virus, anti-spyware or other measures. However, slightly less than 60% of the company's employees know how to check if the Internet connection is safe. Almost 80% of companies declared that they use up-to-date software.

A vast majority of respondents never became a victim of abuse related to the use of data they provided. (94.2%).

5G NETWORK

5G

26.5% of respondents are familiar with the term "5G network". Nearly half of them know which generation telephone networks are currently in use.

Nearly half of customers declared that the development of 5G network will have no impact on their companies' growth.

They think that the present parameters of access to the Internet in their company are sufficient for its proper functioning, both presently and in the future.

OVER-THE-TOP SERVICES



Almost half of respondents admitted the development of OTT services improved communication in the company (42.8%), yet at the same time similar number stated that OTT services had no influence in any way on the functioning of the company they work for. 16.5% of surveyed individuals pointed out that OTT services reduced costs, followed by 7% claiming that they helped to extend the products range.

Only nine individuals declared considering the use of OTT services. Respondents mentioned communication and app services.

BIG DATA



18.4% of respondents came across the term "big data". Among all business entities that have access to the Internet, 14.7% companies use Big Data. It is far more often related to the possession of own infrastructure (10.9% of the companies involved in this survey).

Nearly half of respondents (45.6%), whose companies use big data notice the benefits it brings to the company. The increase of final customer satisfaction is most often mentioned.



CLOUD COMPUTING



Some respondents (35.9%) came across the term "cloud computing".

Out of companies that use the Internet, 30.1% also use cloud computing. Most companies support themselves with external infrastructure (18.8%).

Protection from loss of data was most often mentioned as a positive. The most frequently listed negative was the risk of data leakage due to hacker break-ins.

ASSESSMENT OF THE TELECOMMUNICATIONS MARKET



The best rated aspect concerning the functioning of the telecommunications market is access to services, i.e. the possibility of selection from various services and operators. The most poorly rated aspects are efficiency of complaints and dispute resolution.

26.8% of respondents heard about the Office of Electronic Communications. This institution collected numerous positive rates (54.2% – total number of "rather good" and "certainly good" responses).

DIGITAL SINGLE MARKET



A vast majority (95.0%) of companies do not engage in cross-border sales. Similarly, 94.7% of companies do not provide cross-border services.

A great majority of companies (84.0%) do not sell products online. 6.3% sell to EU member states.

Half of organisations that sell products outside the EU provide other organisations and companies with those products, while nearly half of them deliver entirely online electronic services to individual customers.

Companies selling online to Polish customers generate half of their profit from this activity.

Most business entities do not engage in cross-border purchase of products or services (91.7% and 95.5% respectively). In addition, 76.4% of respondents declared that their company is unlikely to ever purchase their products and services online. Only 4.7% of surveyed individuals stated that their company was considering such an option.

Companies that decided to purchase something online in a country other than an EU country, mostly did it due to a wide range of products.

THANK YOU FOR ATTENTION

THE REPORT ON THE SURVEY OF BUSINESS CUSTOMERS

Warsaw, Gdańsk, 22.12.2017