

U.S. Business Mobility Bundling & Wireless Back-Up Analysis

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About the Research

This study analyzes results from our most recent survey conducted by *Independence Research LLC*. focusing on the choices business IT/Comms decision-makers take when evaluating and subscribing to wireless services.

Survey Details:

- 1000+ SMB IT decision-makers with control or participation in IT/communications spending
- Online panel, national U.S. footprint
- Survey response date – *Surveys in field*
March 2023 & October 2023

Data in this analysis is drawn from two of our most recent *Independence Research* surveys:

2023 SMB Internet & Mobility Study & U.S. Business Managed Services Survey:

Total Respondents N=1170 & N=1052

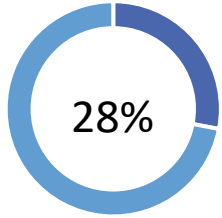
Analysis and Segmentation

➤ Employee Size:

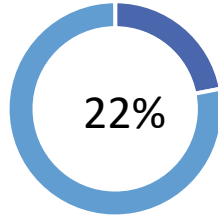
- Under 20 employees (N=162)
- 20 – 99 employees (N=436)
- 100-499 (N=326)

**Note – SMB employee segment breakdowns exclude Sole Proprietorships & Enterprises*

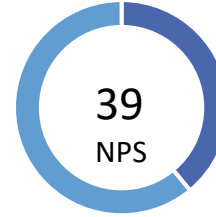
Survey Highlights: *Key Results*



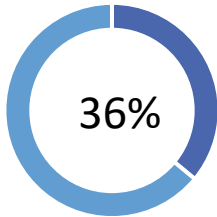
SMB penetration rate of survey respondents subscribing to business mobile services



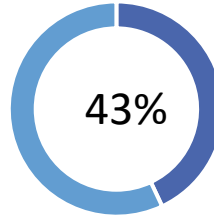
% of SMBs that would likely switch ISPs if a mobile bundle was available



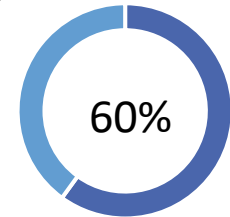
NPS Score: Verizon is tied with Cable for highest NPS score among Business Mobility service providers



Wireless Internet Back-Up is the #1 service SMBs want to bundle with broadband..



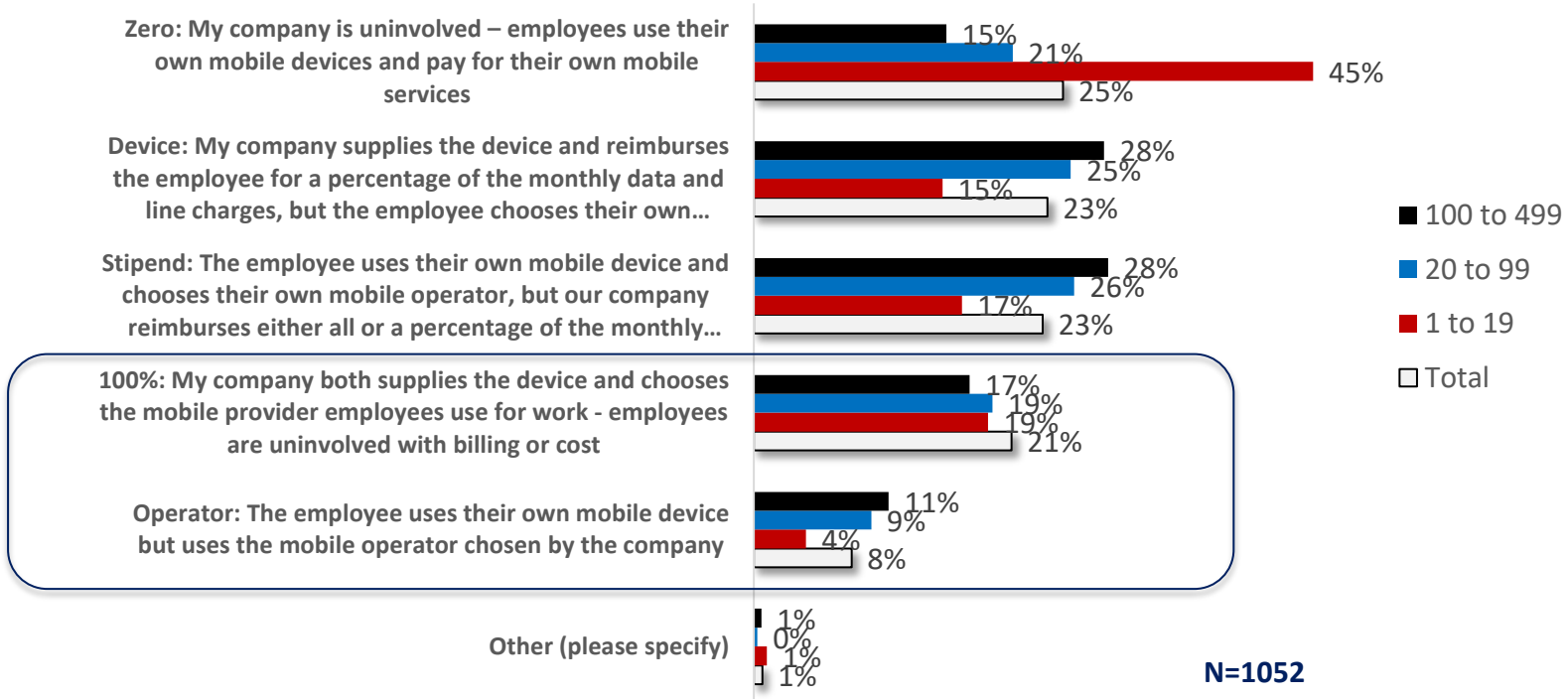
Overall % of SMBs currently using wireless Internet back-up services



% of SMBs that do not use their primary broadband provider for wireless internet back-up

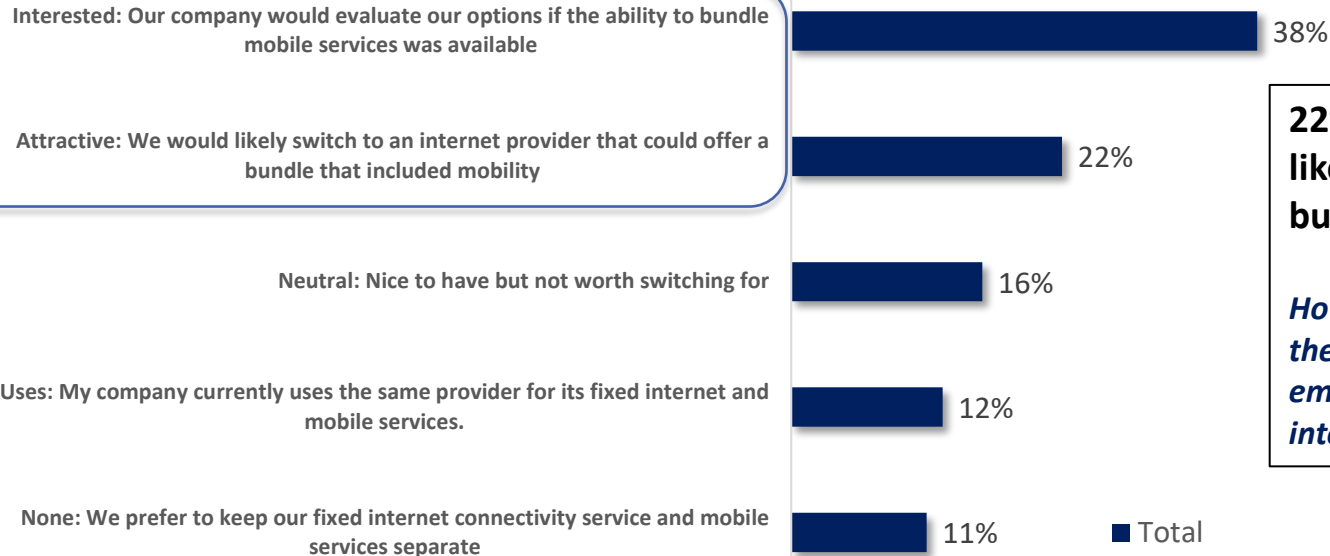
SMB Mobility – Who Chooses, Who Pays?

Please describe how your company provides mobile devices and services to employees (devices include phones and tablets, but not laptops):



Mobility Bundle – Churn Trigger?

Q. If a competitor to your current business internet provider was able to offer both fixed internet service and also mobile services what impact would it have on your ISP relationship?



22% of SMBs say they would likely switch ISPs if a mobile bundle was available –

However – the same % (22%) of the smallest businesses (1-19 employees) have no interest in an internet/mobility bundle..

■ Total
Respondents

N=305

Other Topics/Analysis in this study..

- **Planned Telecom Spending**
- **SMB Mobility – Who Chooses, Who Pays?**
- **Business Mobility NPS Scores (SMB & Mid-Market)**
- **Business Mobility NPS Score Breakdown**
- **Mobility Bundle – Churn Trigger?**
- **Mobility Bundle – *Why attractive?***
- **Fixed Wireless Bundle – *Buyer Reaction***
- **Wireless on the Rise..**
- **Top Business Broadband Services Additions**
- **Business Telecom Services – *Current Usage***
- **Business Telecom Services - *Planning to Use***
- **Wireless Internet Back-Up Breakdown - *Opportunity Knocks..***
- **Internet Outage Impact on Business Productivity**
- **Internet Outage Plans**
- **Wireless Internet Back-Up – *Do you use your ISP?***
- **Wireless Internet Back-Up – *Why not your ISP?***



Thank You

For comments or questions please contact me...



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