



ComReg – SME Fixed Voice Research

Date: February 2020

Job Reference: 405919



REDC

Presentation Structure

1. Background to the Business

2. Services Purchased

3. Service Provider

4. Bundles

5. Phone Usage

6. Business Phone:
Bundles & Price

7. Phone Usage,
Patterns & Awareness

8. Switching & Sticking

9. Reasons for Not
Having a Fixed Landline
Telephone Service

10. Analysis of Sample

11. Summary of Key
Findings



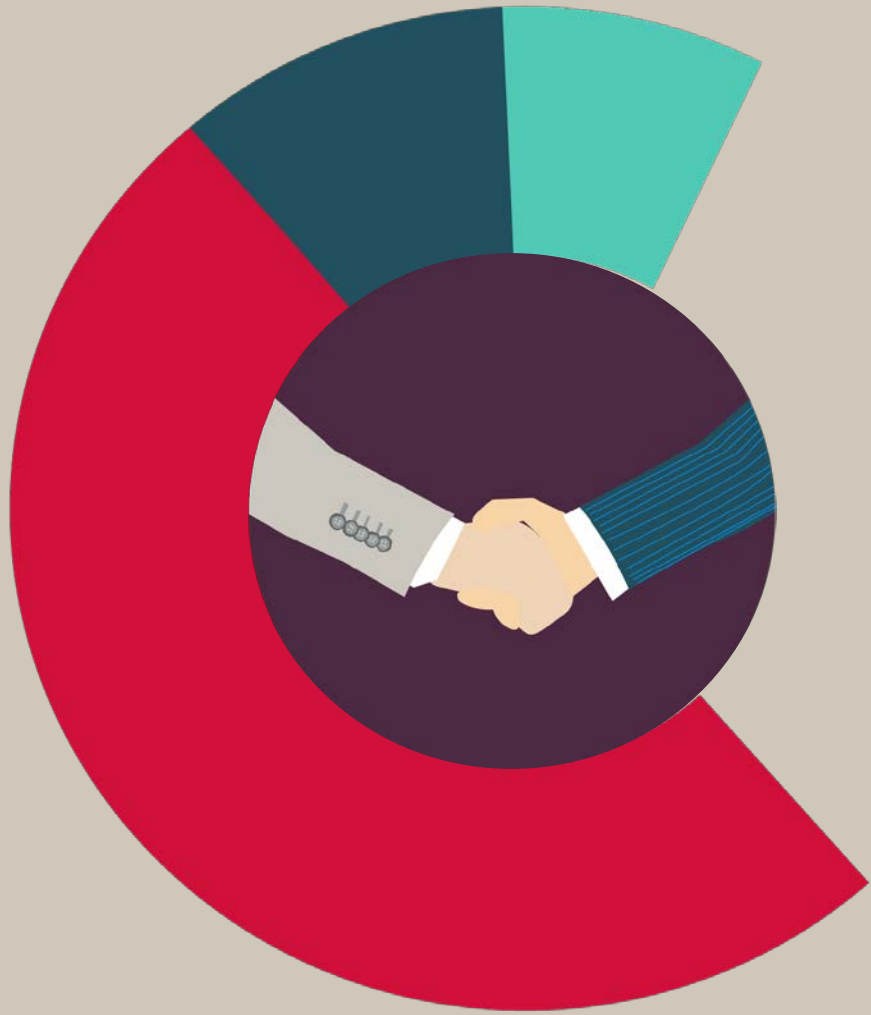
Methodology

- / 501 business interviews were conducted over the telephone within the Republic of Ireland between October – December 2019.
- / Interviews were quota controlled by company size and industry sector in order to produce a nationally representative sample of SMEs in Ireland.



Company Size	Number of Interviews Conducted	Weighted Representative Sample
1-10 Employees	349	420
11-49 Employees	127	70
50-249	25	10
Industry Sector		
Agriculture/Forestry/Fishing	28	15
Mining/Construction	39	35
Manufacturing	34	30
Services (incl Utilities and Professional)	157	190
Wholesale	43	40
Retail	114	105
Health and Education	63	55
Public Administration	23	30

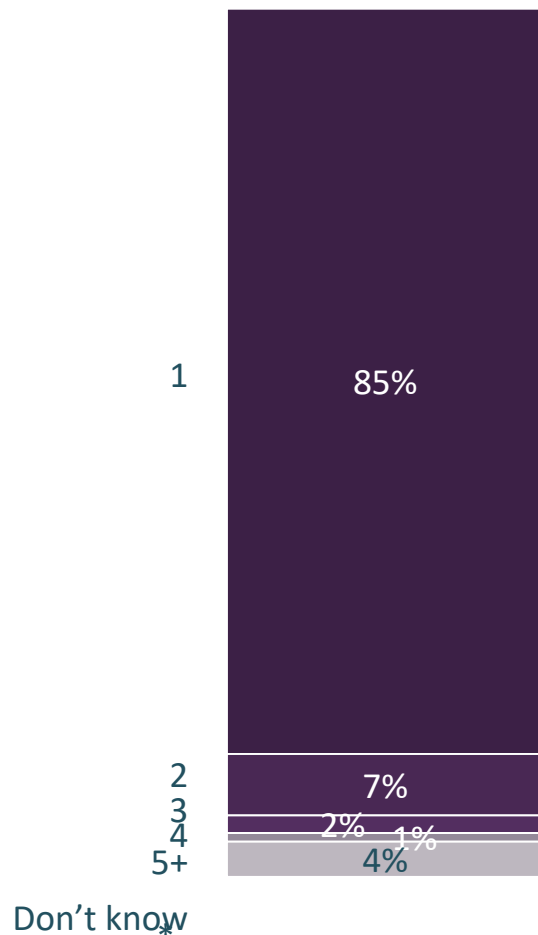
- / Interviews were conducted with the person in the business either responsible, or jointly responsible for, telecommunications within the organisation.
- / Throughout the report, the base size expressed is the unweighted base.



Background to the Business

Number of Business Premises in ROI

(Base: All telecoms decision makers, n=501)



Q. How many business premises does your company have in the Republic of Ireland?

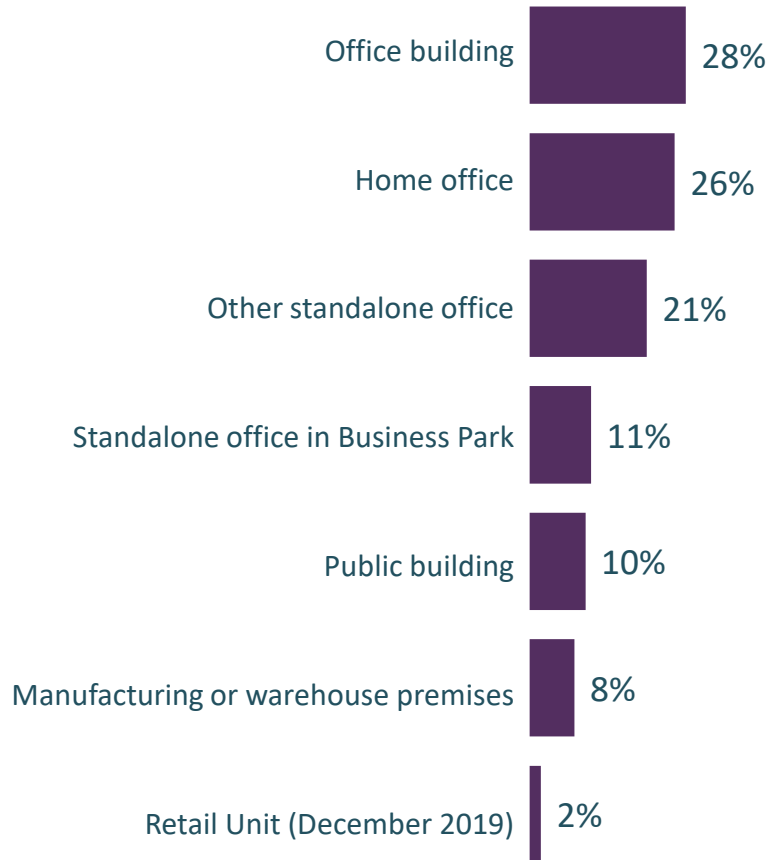
	Company size		
	Micro (1-10) (n=349)	Small (11-50) (n=127)	Medium (50-249) (n=25*)
1	88%	74%	42%
2	6%	17%	22%
3	2%	3%	7%
4	1%	3%	14%
5+	3%	3%	16%
Don't know	*	1%	0%

* Caution: Small Base

The majority of businesses in ROI have one location – particularly Micro sized businesses and those based outside of Dublin.

Type of Business Premises

(Base: All telecoms decision makers, n=501)



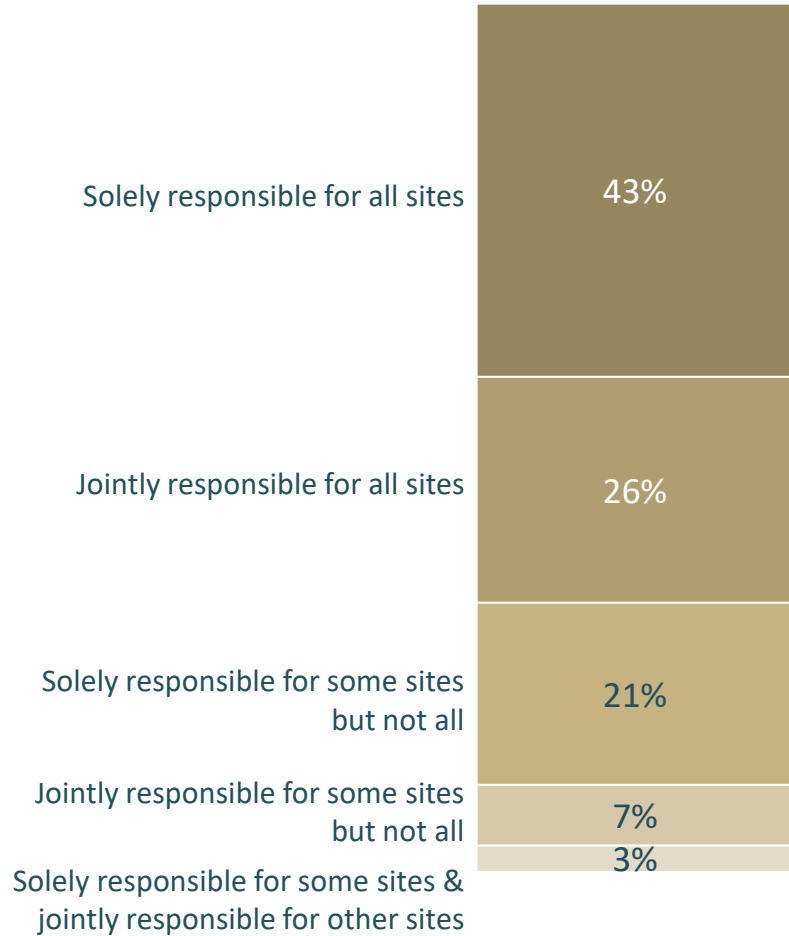
Q. Which of the following options accurately describes the type of business premises for which you are responsible for selecting telecommunication services?

Company size		
Micro (1-10) (n=349)	Small (11-50) (n=127)	Medium (50-249) (n=25*)
28%	32%	32%
30%	7%	0
20%	23%	41%
10%	11%	8%
9%	17%	4%
6%	11%	27%
2%	1%	3%

Over 1 in 4 businesses operate from an office building, and a similar proportion from a home office. However, as expected, micro sized businesses are much more likely to operate from a home office, with small and medium sized offices, and those based in Dublin, more likely to operate from an office building.

Responsibility for more than one Premises

(Base: All telecoms decision makers with more than one premise, n=85)



Solely responsible for all sites

Jointly responsible for all sites

Solely responsible for some sites but not all

Jointly responsible for some sites but not all

Solely responsible for some sites & jointly responsible for other sites

Company size		
Micro (1-10) (n=38*)	Small (11-50) (n=33*)	Medium (50-249) (n=14*)
45%	38%	41%
22%	30%	43%
23%	20%	8%
8%	7%	8%
2%	6%	0%

Q. Are you responsible for decision making on telecommunication services at some or all of the sites your business has in the Republic of Ireland?

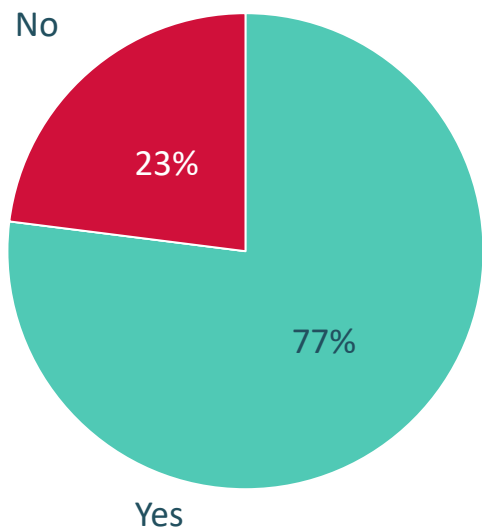
* Caution: Small Base

In over 2 in 5 of the businesses with more than one premises, the decision maker surveyed was solely responsible for all sites, with another 1 in 4 claiming joint responsibility for all sites.

Prevalence of actively used Fixed Landline Telephones

(Base: All telecoms decision makers, n=501)

Q.Does your business have an actively used fixed landline telephone? This comprises of any PSTN, ISDN or VoIP and excludes any unmanaged services such as WhatsApp, FaceTime, Viber, Skype etc.



	Company size			Region			
	Micro (1-10) (n=349)	Small (11-50) (n=127)	Medium (50-249) (n=25*)	Dublin (n=124)	ROL (n=142)	Munster (n=132)	Conn/ Ulster (n=103)
Yes	74%	93%	100%	78%	68%	83%	79%
No	26%	7%	0	22%	32%	17%	20%

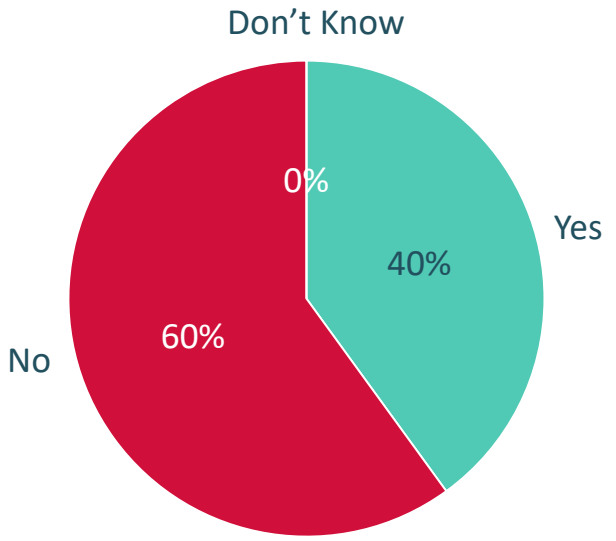
* Caution: Small Base

Over 3 in 4 of the businesses surveyed report having an actively used fixed landline telephone service. This is most prevalent among small and medium sized companies, and those based in Munster. Businesses located in ROL are more likely to say they don't have this service.

Prevalence of more than 1 active Fixed Landline Telephone

(Base: All telecoms decision makers with a fixed landline telephone, n=390)

Q. Does your business have more than one actively used fixed landline telephone? By this I mean the number of physical lines into the business premises and not the number of extensions you have.



	Company size			Region			
	Micro (1-10) (n=248)	Small (11-50) (n=117)	Medium (50-249) (n=25*)	Dublin (n=101)	ROL (n=96)	Munster (n=110)	Conn/ Ulster (n=83)
Yes	36%	50%	79%	46%	32%	41%	37%
No	64%	49%	21%	54%	68%	59%	63%
Don't know	0%	1%	0%	0%	1%	0%	0%

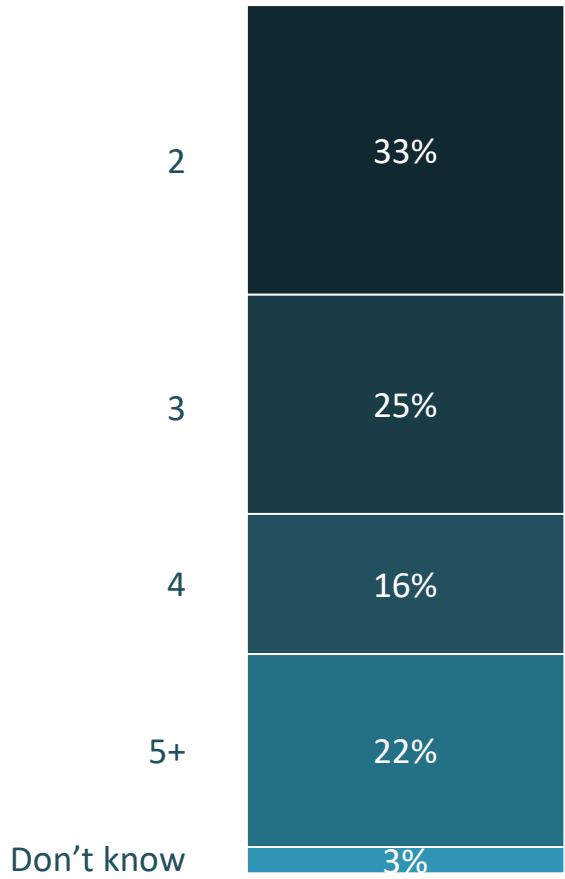
* Caution: Small Base

2 in 5 businesses report having more than 1 actively used fixed landline telephone. This is much higher among small and medium sized companies, and those based in Dublin.

Number of actively used Fixed Landlines

(Base: All telecoms decision makers with more than one fixed landline telephone, n=168)

Q. Does your business have more than one actively used fixed landline telephone? By this I mean the number of physical lines into the business premises and not the number of extensions you have.



	Company size		
	Micro (1-10) (n=87)	Small (11-50) (n=61)	Medium (50-249) (n=20*)
2	36%	30%	9%
3	27%	20%	14%
4	14%	26%	15%
5+	19%	23%	62%
Don't know	4%	0%	0%

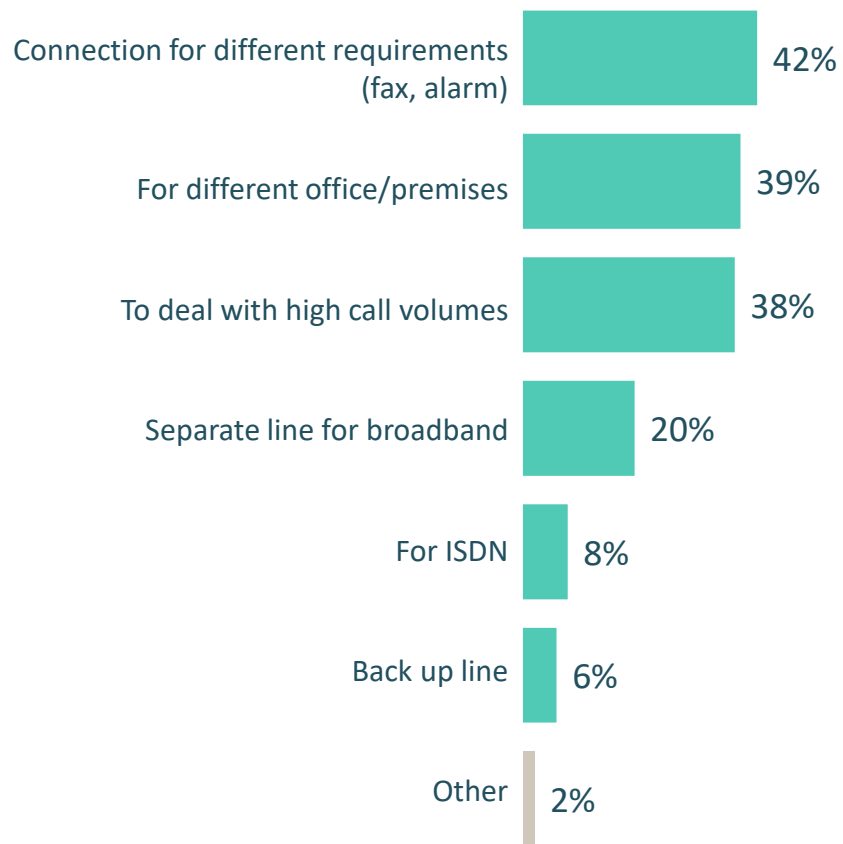
* Caution: Small Base

Over half of businesses with more than one fixed landline service have 2-3 fixed landline telephones, with over 1 in 5 claiming to have more than 5 fixed landline telephones. Medium sized companies are much more likely to have 5+ fixed landlines.

Reason(s) for having more than 1 Fixed Landline Telephone

(Base: All telecoms decision makers with more than one fixed landline telephone, n=168)

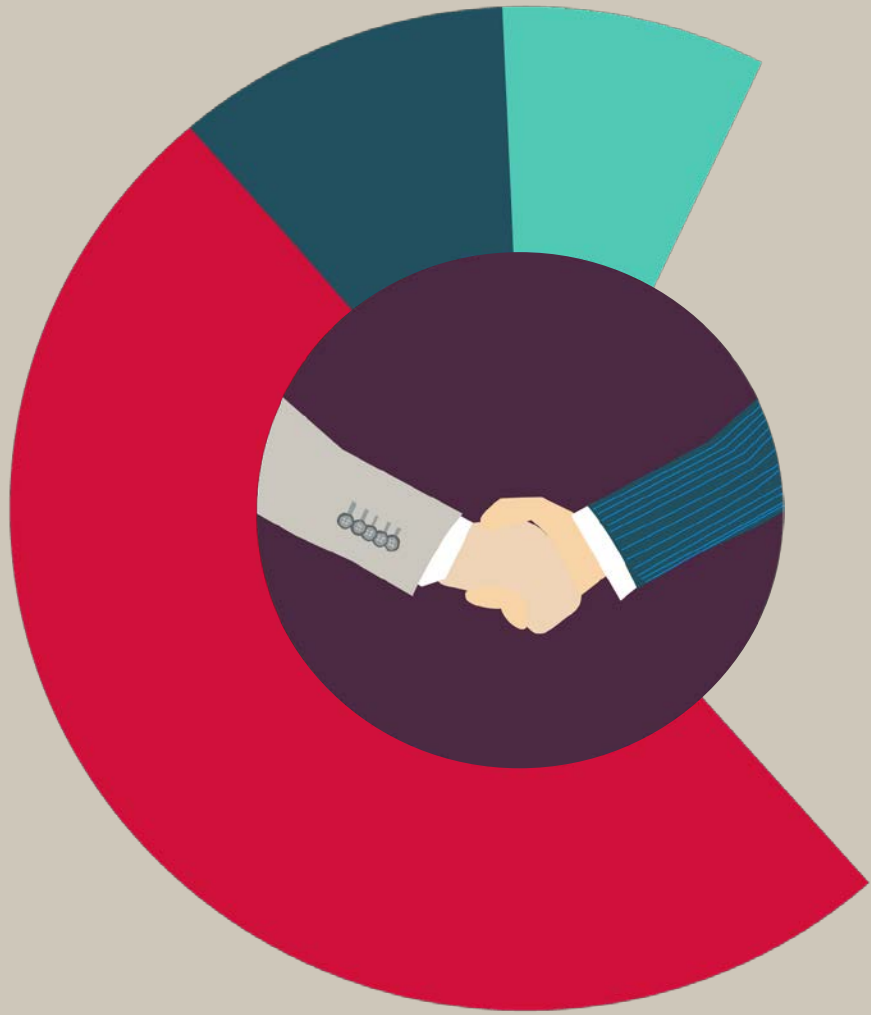
Q. Why does your business have more than one fixed landline telephone?



	Company size		
	Micro (1-10) (n=80)	Small (11-50) (n=61)	Medium (50-249) (n=20*)
Connection for different requirements (fax, alarm)	44%	35%	41%
For different office/premises	36%	40%	62%
To deal with high call volumes	38%	43%	20%
Separate line for broadband	23%	15%	10%
For ISDN	7%	10%	10%
Back up line	5%	6%	15%
Other	1%	4%	5%

Top three reasons for having more than one fixed landline service include: needing additional connection for different requirements, needing additional fixed landlines for different premises, and to deal with high call volumes.

* Caution: Small Base



Services Purchased

Telecommunication Services currently purchased

(Base: All telecoms decision makers with fixed landline telephone, n=391)

Q. Which of the below telecommunication services does your business purchase?

		Company size			Region				Sector**			
		Micro (1-10) (n=249)	Small (11-50) (n=117)	Medium (50-249) (n=25*)	Dublin (n=101)	ROL (n=96)	Munster (n=110)	Conn/ Ulster (n=84)	Health/ Education (n=40*)	Retail (n=106)	Services (n=125)	Wholesale (n=39)
Fixed landline phone	96%	95%	98%	85%	94%	95%	97%	96%	99%	98%	95%	99%
Fixed Broadband	91%	90%	94%	92%	94%	90%	90%	88%	88%	90%	92%	96%
Mobile Phone	75%	75%	70%	89%	70%	71%	80%	77%	70%	66%	73%	93%
Mobile Broadband	20%	18%	22%	74%	22%	15%	20%	25%	16%	19%	16%	30%
Other services	21%	20%	23%	60%	26%	14%	22%	23%	30%	14%	26%	20%

* Caution: Small Base

**base size for other sectors less than n=27

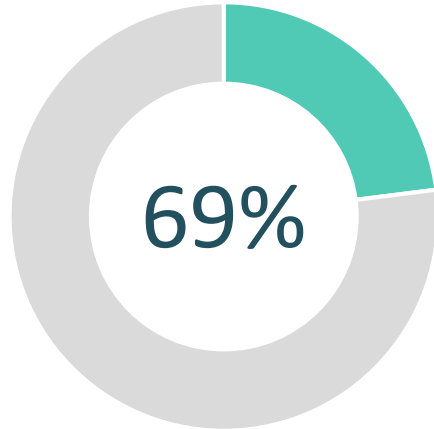
Over 9 in 10 businesses purchase fixed landline telephone and fixed broadband for their business, with no significant difference between various company sizes or regions. Medium sized companies are more likely than average to purchase mobile phone or mobile broadband services.

Telecommunication Services – Standalone v. Bundled Landline

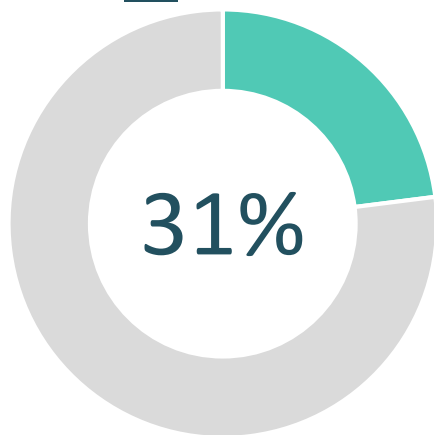
(Base: All telecoms decision makers with fixed landline telephone, n=365)

Q. Which of the below telecommunication services does your business purchase?

Landline & other services in a bundle



Landline & other services not in a bundle



Company size			Region				Sector**	
Micro (1-10) (n=229)	Small (11-50) (n=114)	Medium (50-249) (n=22*)	Dublin (n=95)	ROL (n=89)	Munster (n=100)	Conn/ Ulster (n=81)	Retail (n=99)	Services (n=115)
70%	66%	53%	67%	74%	69%	67%	69%	75%

Company size			Region				Sector**	
Micro (1-10) (n=229)	Small (11-50) (n=114)	Medium (50-249) (n=22*)	Dublin (n=95)	ROL (n=89)	Munster (n=100)	Conn/ Ulster (n=81)	Retail (n=99)	Services (n=115)
30%	32%	34%	32%	25%	31%	33%	30%	24%

* Caution: Small Base

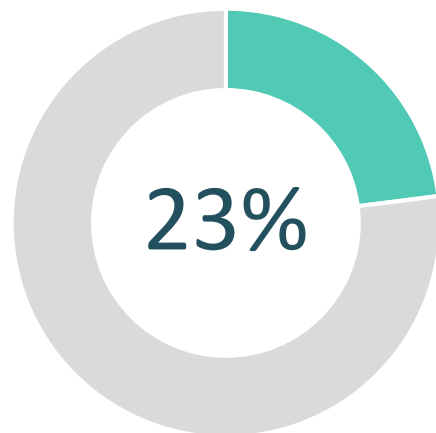
**base size for other sectors less than n=40

69% of businesses with fixed landline, as well as other types of telecommunication services, have these bundled. However, less than 1 in 3 businesses with fixed landline purchase other telecommunication services that are not bundled with their landline service.

Telecommunications Services – Mobile only vs. Standalone Landline

(Base: All telecoms decision makers, n=501)

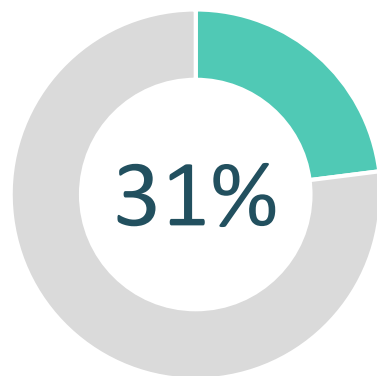
Mobile Only



Company size			Region				Sector**			
Micro (1-10) (n=349)	Small (11-50) (n=127)	Medium (50-249) (n=25*)	Dublin (n=124)	RoL (n=142)	Munster (n=132)	Conn/ Ulster (n=103)	Health/ Education (n=63)	Retail (n=114)	Services (n=157)	Wholesale (n=43)
26%	7%	-	22%	32%	17%	21%	42%	7%	22%	10%

(Base: All telecoms decision makers with fixed landline telephone, n=391)

Standalone Landline



Company size			Region				Sector**	
Micro (1-10) (n=229)	Small (11-50) (n=114)	Medium (50-249) (n=22*)	Dublin (n=95)	RoL (n=89)	Munster (n=100)	Conn/ Ulster (n=81)	Retail (n=99)	Services (n=115)
30%	34%	47%	33%	26%	31%	33%	31%	25%

* Caution: Small Base

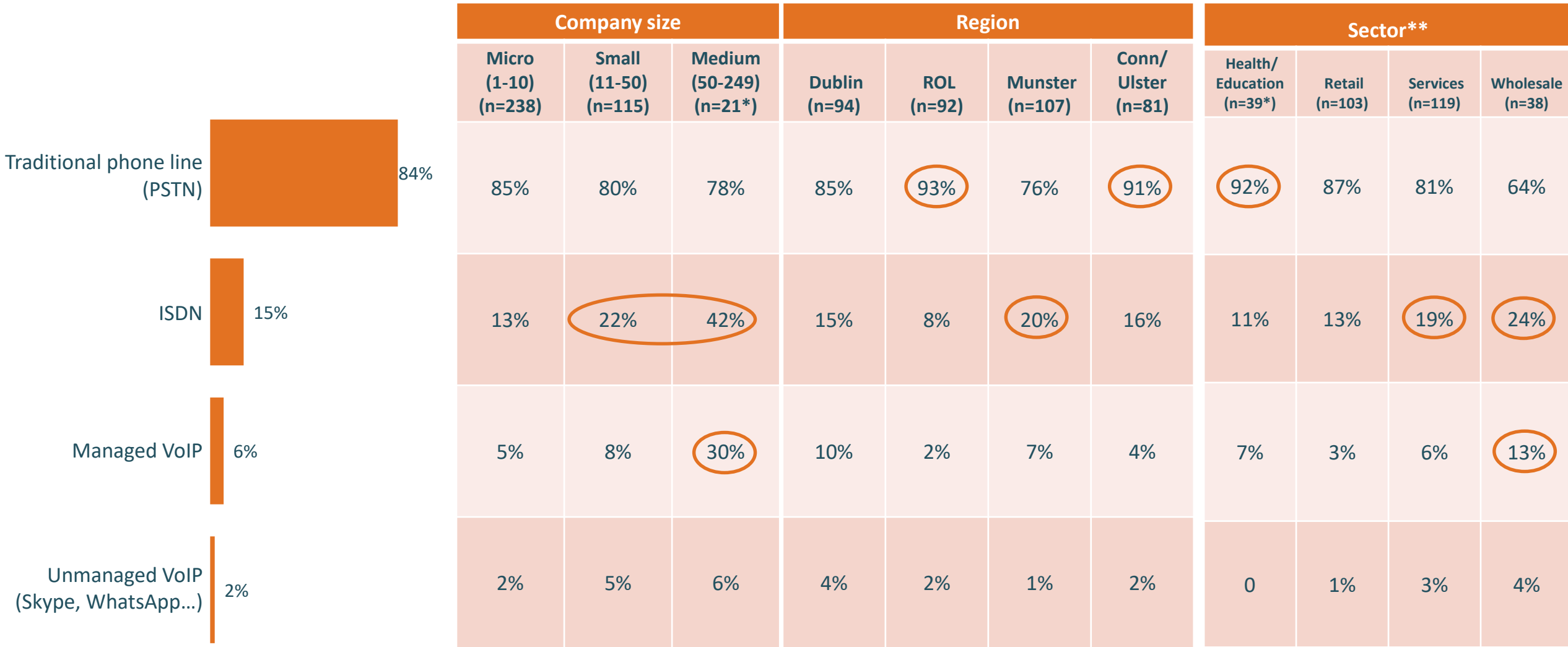
**base size for other sectors less than n=40

Just under a quarter of businesses report only having mobile service, and no fixed landline for their business. These are more likely to be micro sized companies, those based in RoL, and those in the Health/Education sector. 31% of those with fixed landline service report this to be a standalone service.

Means of accessing Voice Services

(Base: All telecoms decision makers who purchase fixed landline telephone, n=374)

Q. In your business, which means of accessing Voice are used?

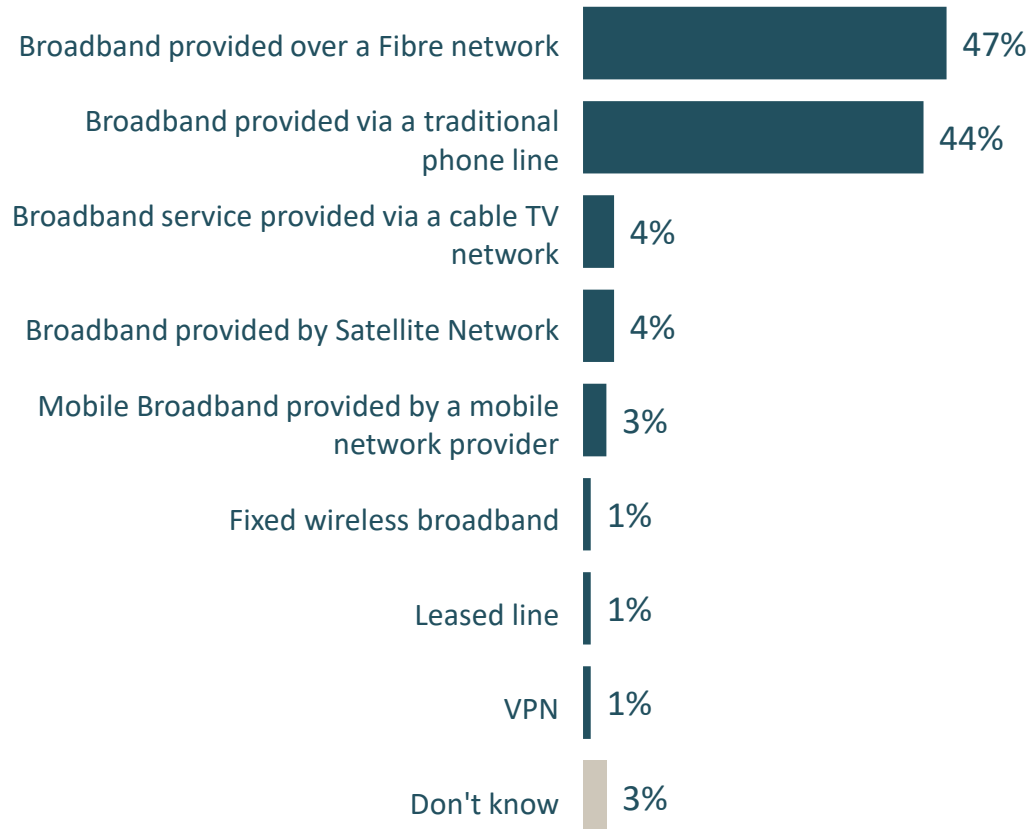


* Caution: Small Base

The majority of businesses purchase PSTN. ISDN purchases are highest amongst Small and Medium sized businesses, while Managed VoIP is more likely to be purchased by Medium companies only.

Means of accessing Broadband

(Base: All telecoms decision makers who purchase broadband, n=357)



Q. In your business, which means of accessing Broadband are used?

Company size		
Micro (1-10) (n=223)	Small (11-50) (n=111)	Medium (50-249) (n=23*)
46%	52%	62%
44%	49%	29%
5%	1%	0%
4%	1%	8%
3%	2%	10%
1%	2%	9%
1%	0%	14%
1%	1%	5%
3%	2%	4%

Region			
Dublin (n=94)	ROL (n=88)	Munster (n=99)	Conn/ Ulster (n=76)
46%	48%	45%	52%
39%	48%	45%	47%
10%	2%	3%	1%
1%	1%	7%	6%
2%	1%	5%	3%
1%	1%	1%	4%
1%	0%	0%	3%
*	0%	0%	4%
3%	2%	3%	2%

Fibre network and traditional phone line are the most popular means of accessing broadband services among businesses.

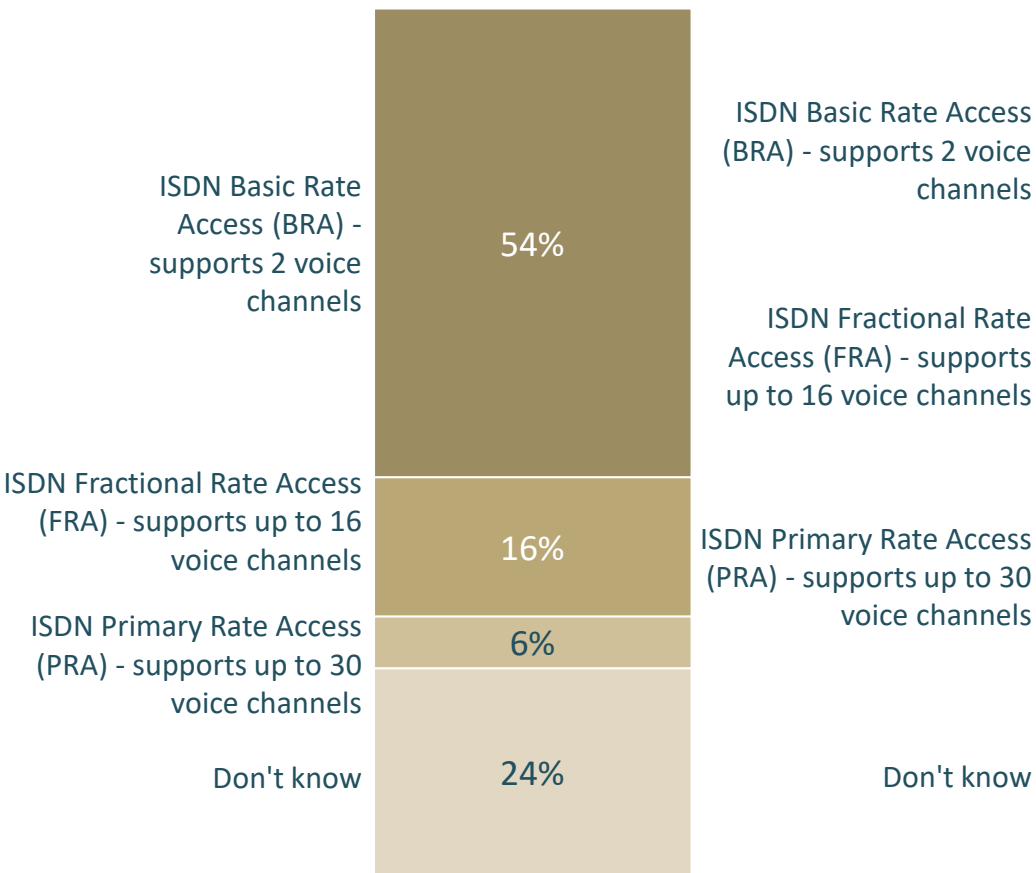
* Caution: Small Base

(Q.9b)

Description of main ISDN Connection

(Base: All telecoms decision makers with ISDN connection, n=65)

Q. Which of the following best describes your main ISDN line connection?

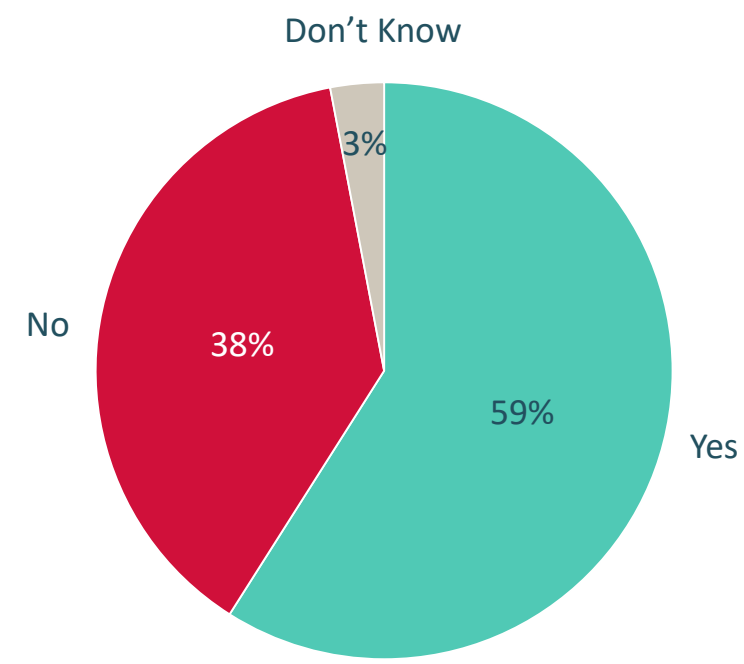


	Company size		
	Micro (1-10) (n=29*)	Small (11-50) (n=27*)	Medium (50-249) (n=9*)
ISDN Basic Rate Access (BRA) - supports 2 voice channels	58%	45%	43%
ISDN Fractional Rate Access (FRA) - supports up to 16 voice channels	15%	18%	26%
ISDN Primary Rate Access (PRA) - supports up to 30 voice channels	3%	10%	21%
Don't know	24%	27%	10%

Multiple ISDN Connections

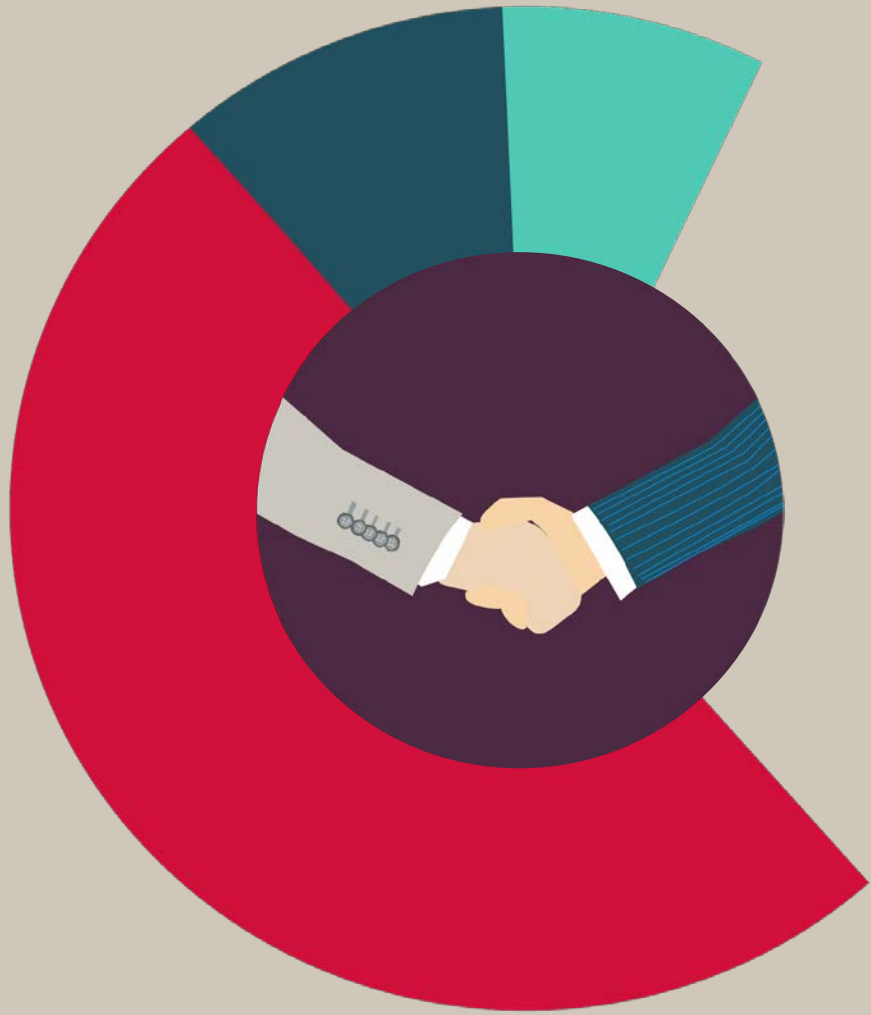
(Base: All telecoms decision makers with ISDN connection, n=65)

Q. Does your business have multiple ISDN line connections?



* Caution: Small Base

Over half of the businesses with ISDN connections use Basic Rate Access connection. Medium sized companies are more likely to report using Fractional or Primary Rate Access connections. 3 in 5 purchase multiple ISDN connections.

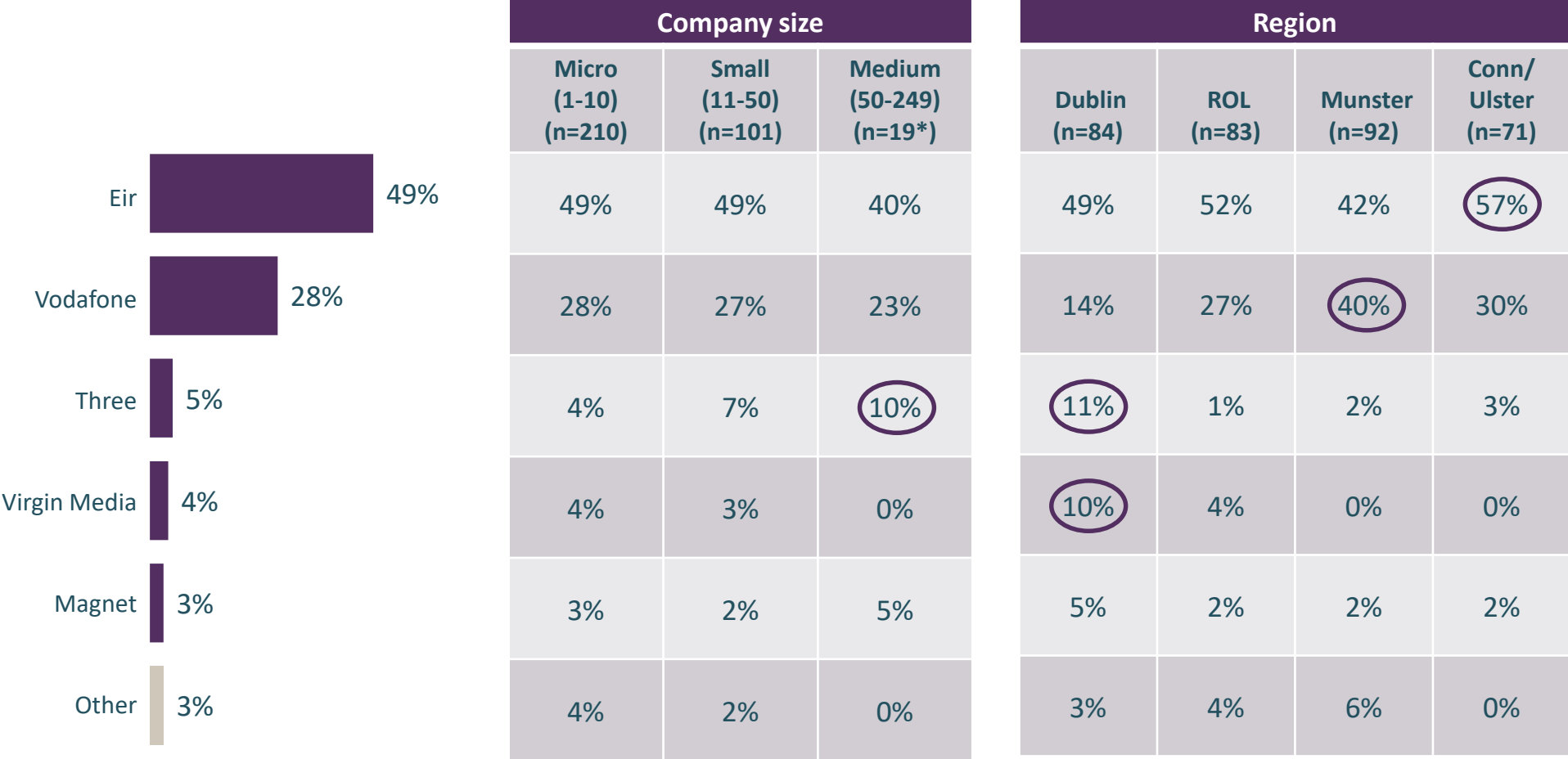


Service Providers

Fixed Landline Service Provider - Calls & Line Rental combined

(Base: All telecoms decision makers with fixed landline who purchase line rental and calls from same provider, n=330)

Q. Which company supplies your business with your fixed landline phone service?



** Mentions with incidence of 1% or lower not shown

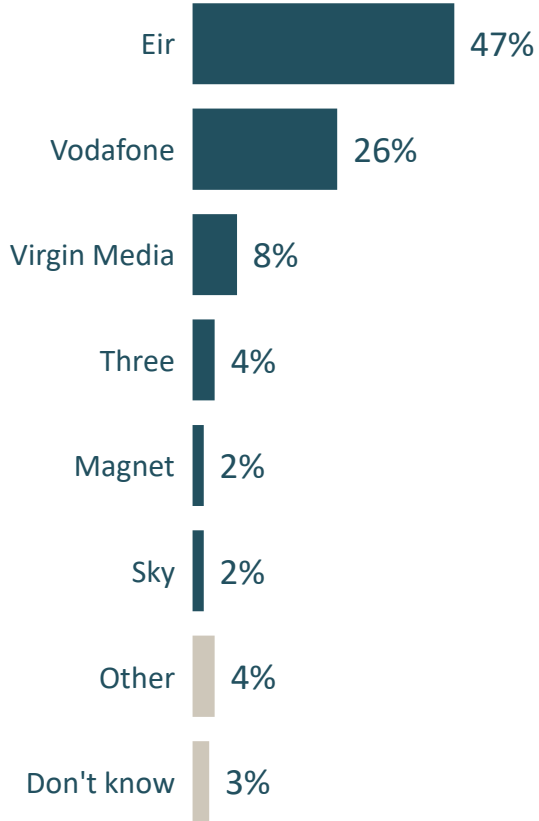
* Caution: Small Base

Eir is the most popular provider of fixed landline telephone services, particularly in Conn/Ulster region. Vodafone is more popular among businesses based in Munster, while those using Three and Virgin Media are more likely to be Dublin based.

Q. Which company supplies your business with your main broadband service?

Main Fixed Broadband Service Provider

(Base: All telecoms decision makers with fixed broadband, n=357)



Company size		
Micro (1-10) (n=223)	Small (11-50) (n=111)	Medium (50-249) (n=23*)
46%	50%	37%
28%	21%	10%
9%	5%	5%
3%	5%	12%
2%	2%	4%
2%	0%	0%
4%	3%	9%
2%	5%	8%

Region			
Dublin (n=94)	ROL (n=88)	Munster (n=99)	Conn/ Ulster (n=76)
50%	46%	42%	49%
11%	30%	37%	30%
21%	6%	*	0%
5%	3%	2%	5%
4%	*	2%	0%
0%	7%	0%	0%
1%	2%	7%	5%
3%	4%	3%	2%

** Mentions with incidence of 1% or lower not shown

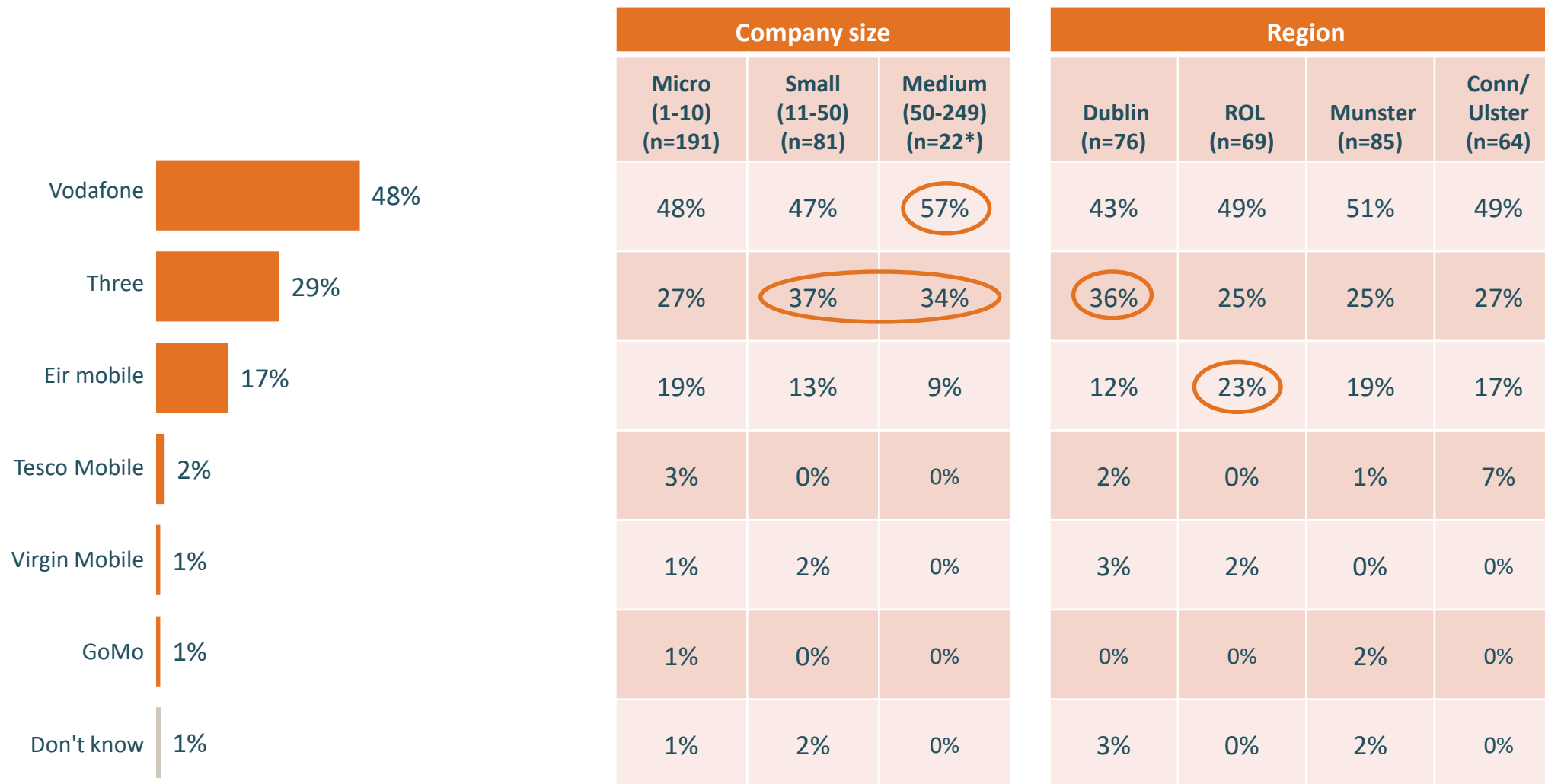
* Caution: Small Base

Eir is also the most popular provider for broadband services. 1 in 4 use Vodafone. This is more prevalent among those based outside Dublin. Those purchasing broadband services from Virgin Media are much more likely to be Dublin based.

Main Mobile Phone Service Provider

(Base: All telecoms decision makers with mobile phone service, n=294)

Q. Which company supplies your business with your mobile phone service? If you have more than one more phone provider please think of the main provider.



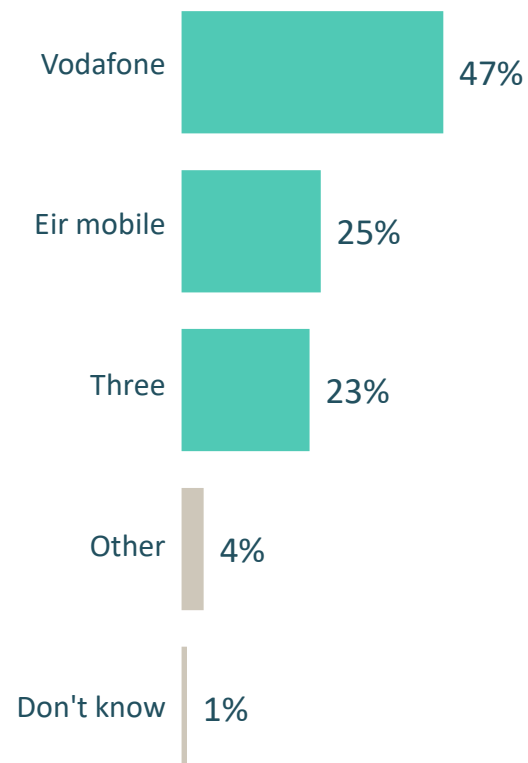
When it comes to mobile phone service, Vodafone is the most popular provider among businesses, with half of SMEs purchasing this service from this provider. Those purchasing mobile service from Three are more likely to be small and medium sized, and Dublin based.

* Caution: Small Base

Main Mobile Broadband Service Provider

(Base: All telecoms decision makers with mobile broadband service, n=91)

Q. Which company supplies your business with your mobile broadband service e.g. using a USB or dongle or data card which you plug into your computer?

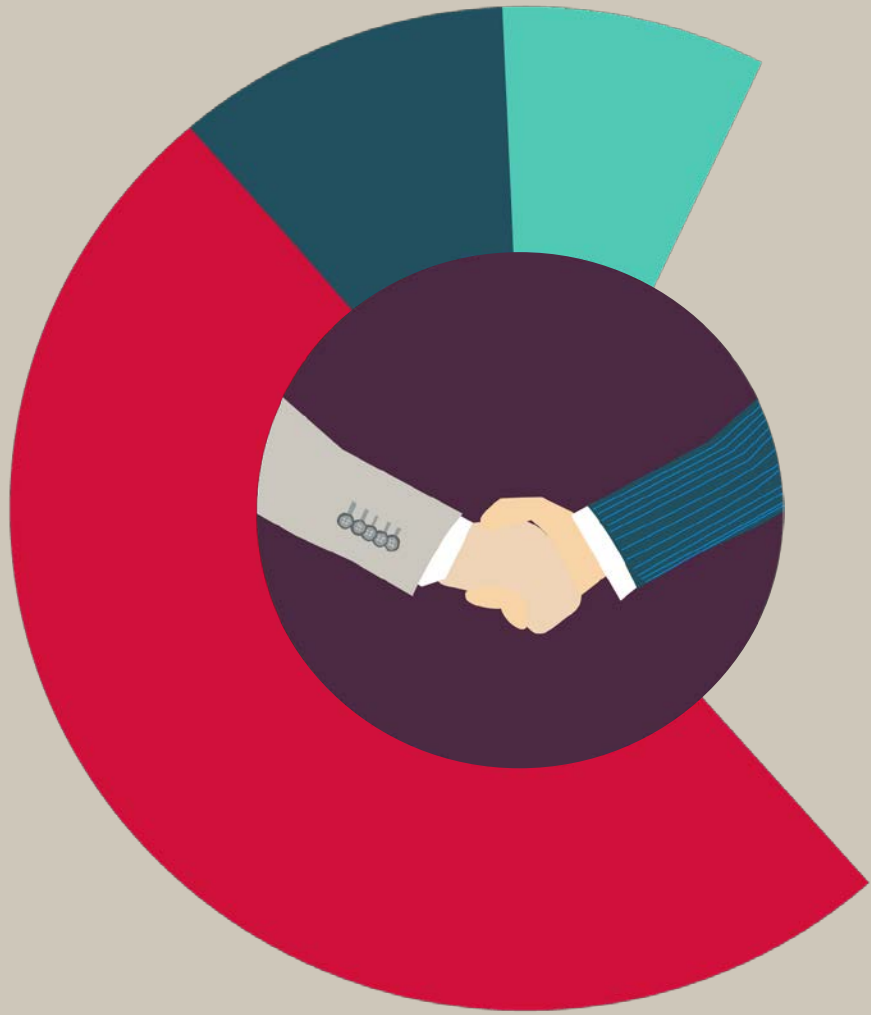


Company size		
Micro (1-10) (n=48*)	Small (11-50) (n=25*)	Medium (50-249) (n=18*)
46%	44%	58%
30%	16%	6%
22%	19%	36%
2%	15%	0%
0%	6%	0%

Region			
Dublin (n=31*)	ROL (n=17*)	Munster (n=23*)	Conn/ Ulster (n=20*)
54%	24%	61%	33%
26%	44%	19%	19%
14%	27%	15%	41%
3%	4%	4%	6%
3%	0%	0%	0%

Vodafone is also the main provider for mobile broadband services, with most commercial end users being medium sized companies, and those based in Dublin or Munster.

* Caution: Small Base

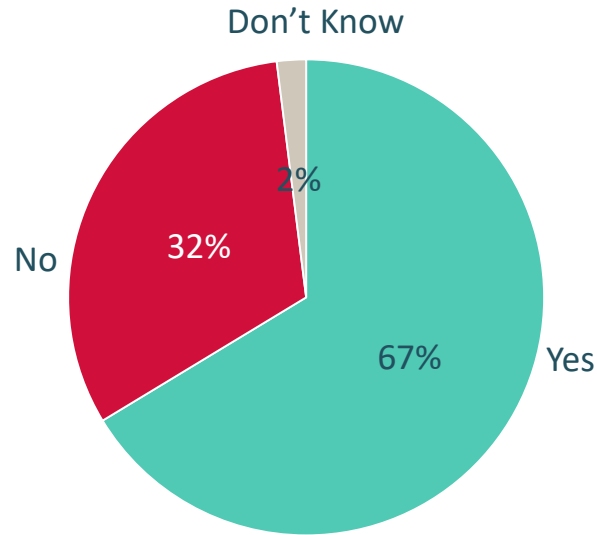


Bundles

Prevalence of Bundled Telecoms Services

(Base: All telecoms decision makers with multiple telecoms services, n=380)

Q. You mentioned that your business purchases [INSERT RELEVANT TELECOM SERVICES FROM Q8]. Do you buy any of these as part of a bundle of services i.e. receive a single bill from one telecommunications operator?



	Company size			Region			
	Micro (1-10) (n=239)	Small (11-50) (n=116)	Medium (50-249) (n=25*)	Dublin (n=100)	ROL (n=92)	Munster (n=105)	Conn/ Ulster (n=83)
Yes	67%	67%	58%	64%	71%	67%	65%
No	32%	31%	34%	34%	27%	31%	35%
Don't know	1%	1%	8%	2%	2%	2%	0%

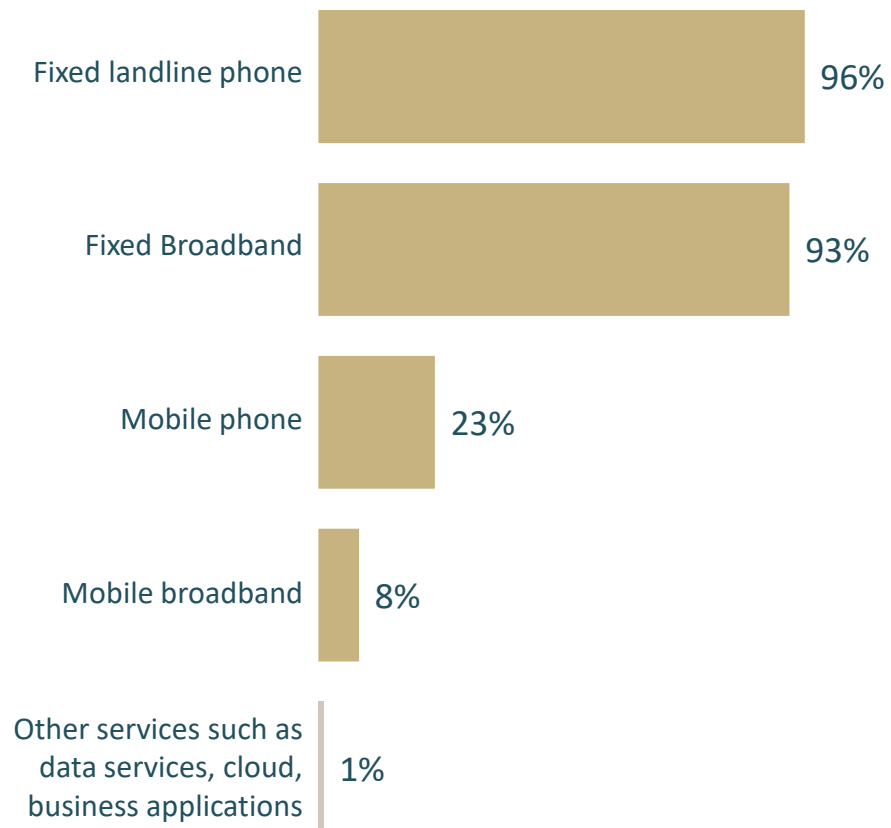
* Caution: Small Base

2 in 3 businesses with more than one type of telecommunications service say they bundle these products together.

Types of Telecoms Services included in the Bundle

Q. Please indicate the services included in your bundle.

(Base: All telecoms decision makers with bundles, n=250)



Company size		
Micro (1-10) (n=159)	Small (11-50) (n=76)	Medium (50-249) (n=15*)
96%	97%	81%
94%	90%	87%
21%	28%	62%
6%	11%	41%
1%	1%	7%

Region			
Dublin (n=64)	ROL (n=63)	Munster (n=66)	Conn/ Ulster (n=57)
95%	97%	95%	97%
93%	93%	95%	92%
26%	18%	22%	27%
10%	8%	4%	10%
1%	0%	2%	3%

The overwhelming majority of businesses bundle fixed landline and broadband services together. Seeing as medium sized businesses were more likely to purchase mobile phone and broadband services, they're also more likely to purchase these services in a bundle.

* Caution: Small Base

(Q.18)

Types of Telecoms Services included in the Bundle

Q. Please indicate the services included in your bundle.

(Base: All telecoms decision makers with bundles, n=250)

Dual Play

Fixed LL & Fixed BB 74%

Fixed LL & Mobile Phone 3%

Mobile Phone & Fixed BB 3%

Mobile Phone and Mobile BB 1%

Triple Play

Fixed LL, Fixed BB & Mobile Phone 10%

Fixed LL, Fixed BB and Cloud 1%

Fixed LL, Mobile BB & Mobile Phone 1%

Quad Play

Fixed LL, Fixed BB, Mobile Phone & Mobile BB 5%

Company size		
Micro (1-10) (n=159)	Small (11-50) (n=76)	Medium (50-249) (n=15*)
77%	64%	38%
3%	4%	0
3%	0	0
1%	1%	6%
8%	15%	14%
1%	0	0
1%	0	0
4%	5%	28%

Region			
Dublin (n=64)	ROL (n=63)	Munster (n=66)	Conn/Ulster (n=57)
72%	76%	76%	71%
5%	2%	2%	3%
3%	2%	4%	3%
0	1%	1%	1%
8%	8%	12%	10%
0	0	2%	0
0	0	1%	2%
8%	5%	1%	5%

3 in 4 businesses have a bundle that includes fixed landline and broadband services. 1 in 10 have mobile phone included alongside fixed landline and broadband, while only 5% report having 4 services (fixed landline, fixed & mobile broadband and mobile phone) in their bundle. Medium sized companies are more likely to have more services as part of their bundle.

* Caution: Small Base

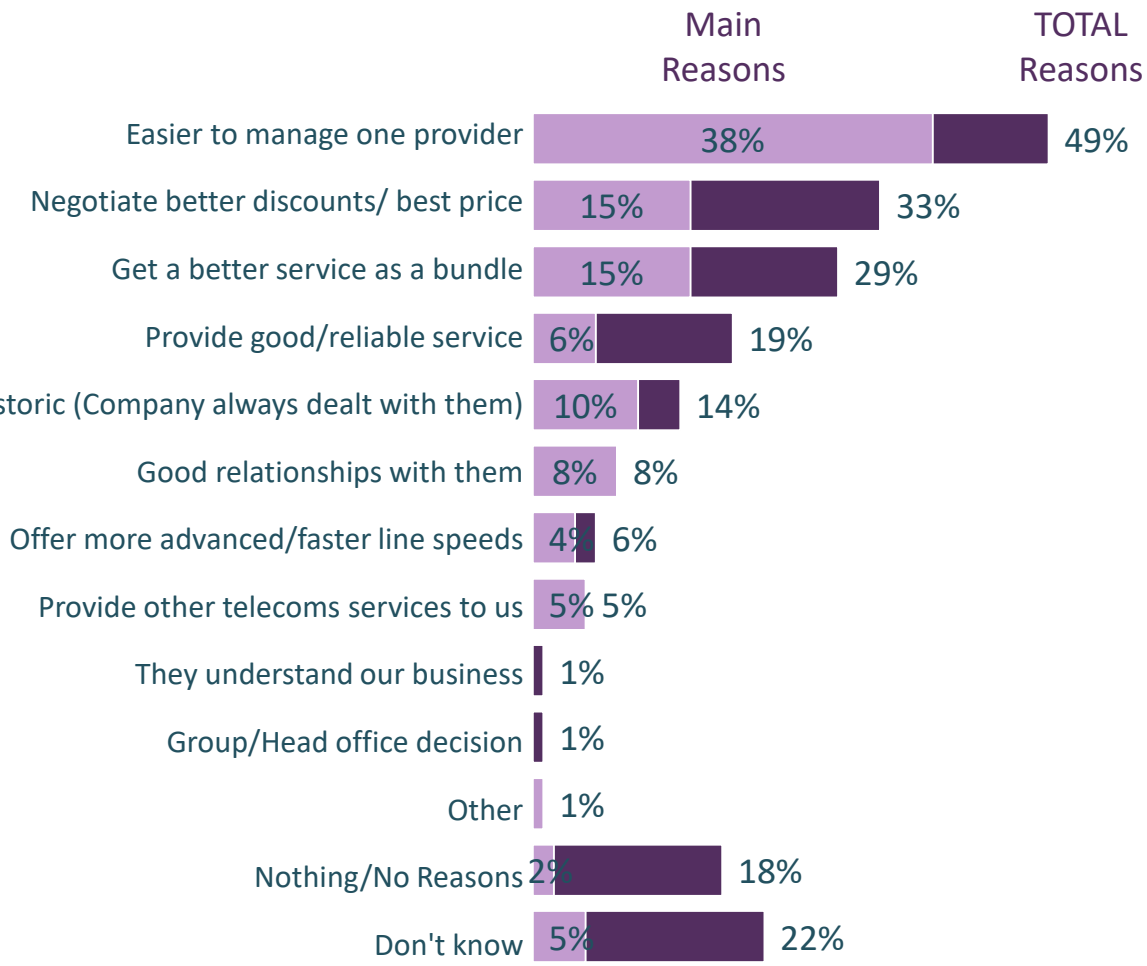
(Q.18)

Reason(s) for bundling Services

(Base: All telecoms decision makers with bundles, n=250)

Q. What is the main/any other reason why your company use one provider for this bundle of telecommunication services?

Total Reasons



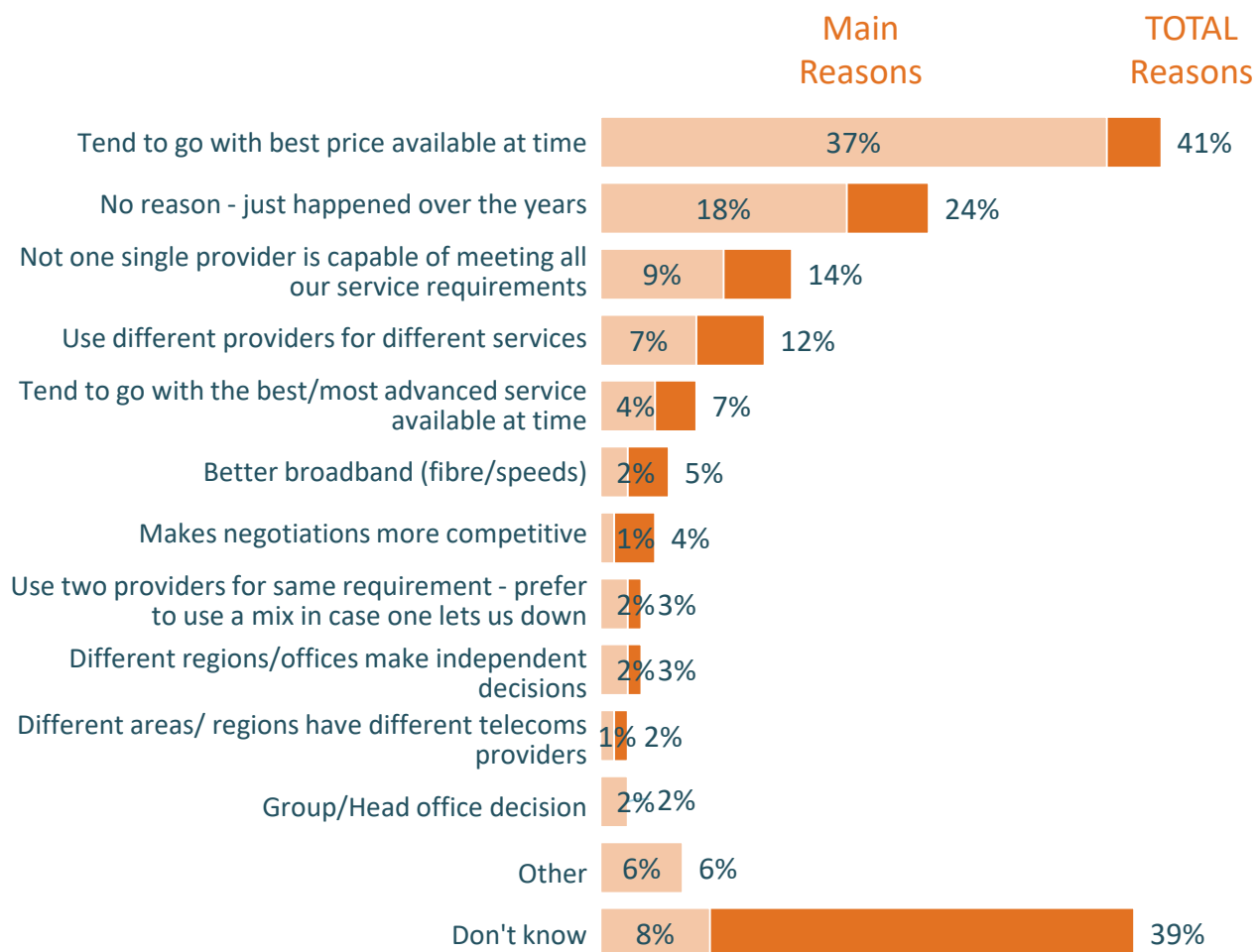
Company size			Region			
Micro (1-10) (n=159)	Small (11-50) (n=76)	Medium (50-249) (n=15*)	Dublin (n=64)	ROL (n=63)	Munster (n=66)	Conn/ Ulster (n=57)
47%	57%	39%	47%	55%	45%	48%
32%	35%	39%	35%	36%	26%	39%
28%	37%	12%	27%	25%	29%	38%
19%	16%	14%	16%	22%	22%	14%
16%	8%	15%	23%	9%	10%	14%
9%	3%	8%	11%	6%	6%	7%
7%	6%	0	6%	6%	8%	4%
5%	0	12%	2%	5%	6%	6%
1%	1%	0	1%	2%	0	2%
0	3%	0	0	1%	1%	1%
1%	0	7%	1%	0	2%	3%
17%	18%	28%	20%	21%	17%	11%
22%	20%	26%	18%	20%	32%	16%

* Caution: Small Base

Overall, ease of management of services, negotiating better discounts, and getting better services remain the top three reasons why businesses choose to bundle their telecommunications services.

Reasons for not bundling Services

(Base: All telecoms decision makers without bundles, n=123)



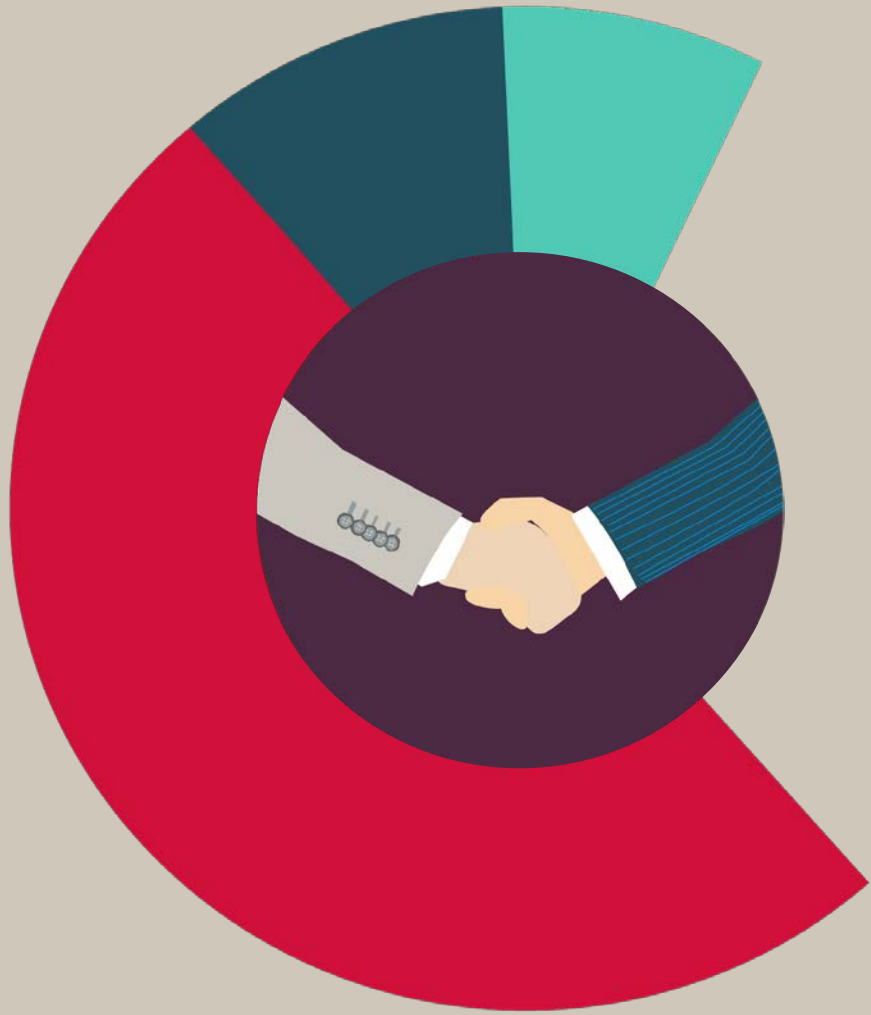
Q. What is the main/any other reason your company uses more than one provider for your telecommunication services?

Total Reasons

Company size		
Micro (1-10) (n=77)	Small (11-50) (n=38*)	Medium (50-249) (n=8*)
39%	50%	61%
25%	22%	11%
13%	17%	26%
12%	17%	0
6%	9%	14%
6%	0	25%
4%	5%	0
2%	6%	14%
3%	5%	0
3%	0	0
2%	5%	0
8%	2%	0
40%	34%	35%

* Caution: Small Base

The top reason cited by businesses for not bundling services is that they tend to go with the best price available at the time. For 1 in 5, this has not been a conscious decision, but rather something that has happened over the years.

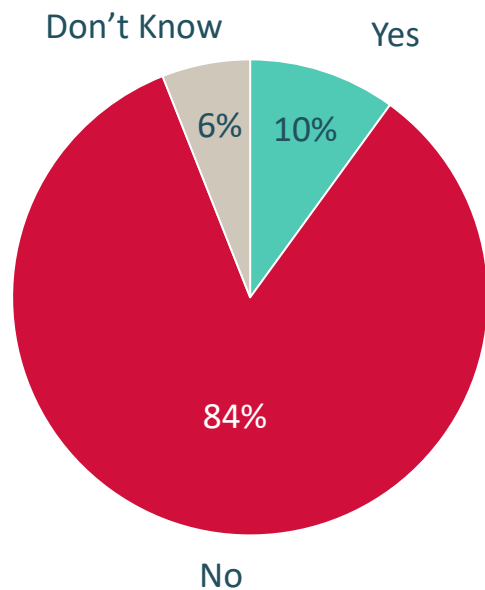


Fixed Phone Usage

PBX (Private Branch Exchange) Usage

(Base: All telecoms decision makers with fixed landline telephone, n=390)

Q. Does your business use a PBX (Private Branch Exchange) to manage/aggregate calls? PBX is a telephone exchange that serves a particular business or office and allows multiple employees to be connected to a single phone system.



	Company size			Region			
	Micro (1-10) (n=248)	Small (11-50) (n=117)	Medium (50-249) (n=25*)	Dublin (n=101)	ROL (n=96)	Munster (n=110)	Conn/ Ulster (n=83)
Yes	7%	15%	50%	18%	2%	7%	9%
No	86%	80%	45%	78%	91%	88%	80%
Don't know	6%	5%	5%	4%	7%	5%	10%

Only 1 in 10 businesses say they use PBX to manage/aggregate calls. Medium sized companies and those based in Dublin are much more likely to do this.

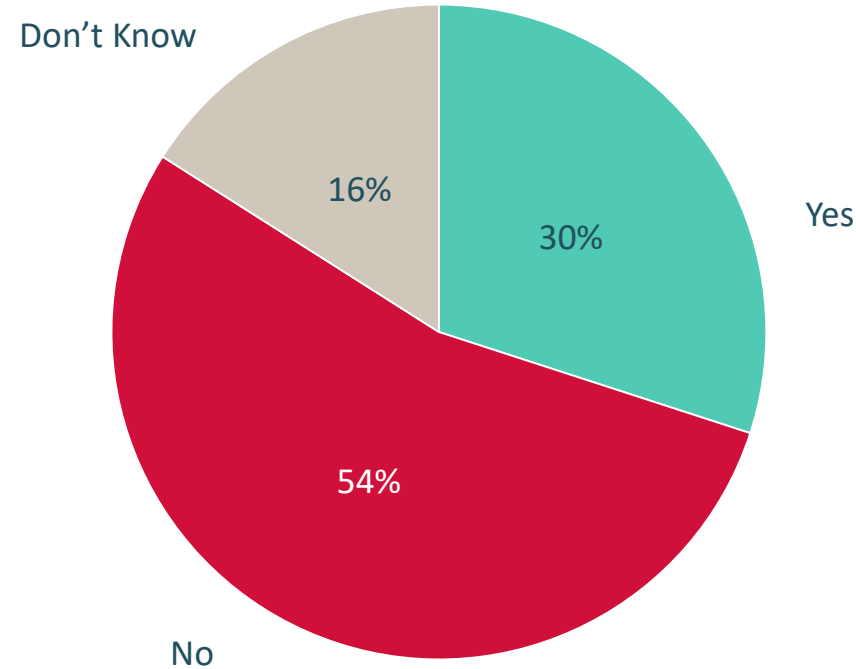
* Caution: Small Base

(Q.21)

IP Based PBX Service

(Base: All telecoms decision makers with fixed landline telephone using PBX, n=45)

Q. Is your PBX an internet Protocol (IP) based service?

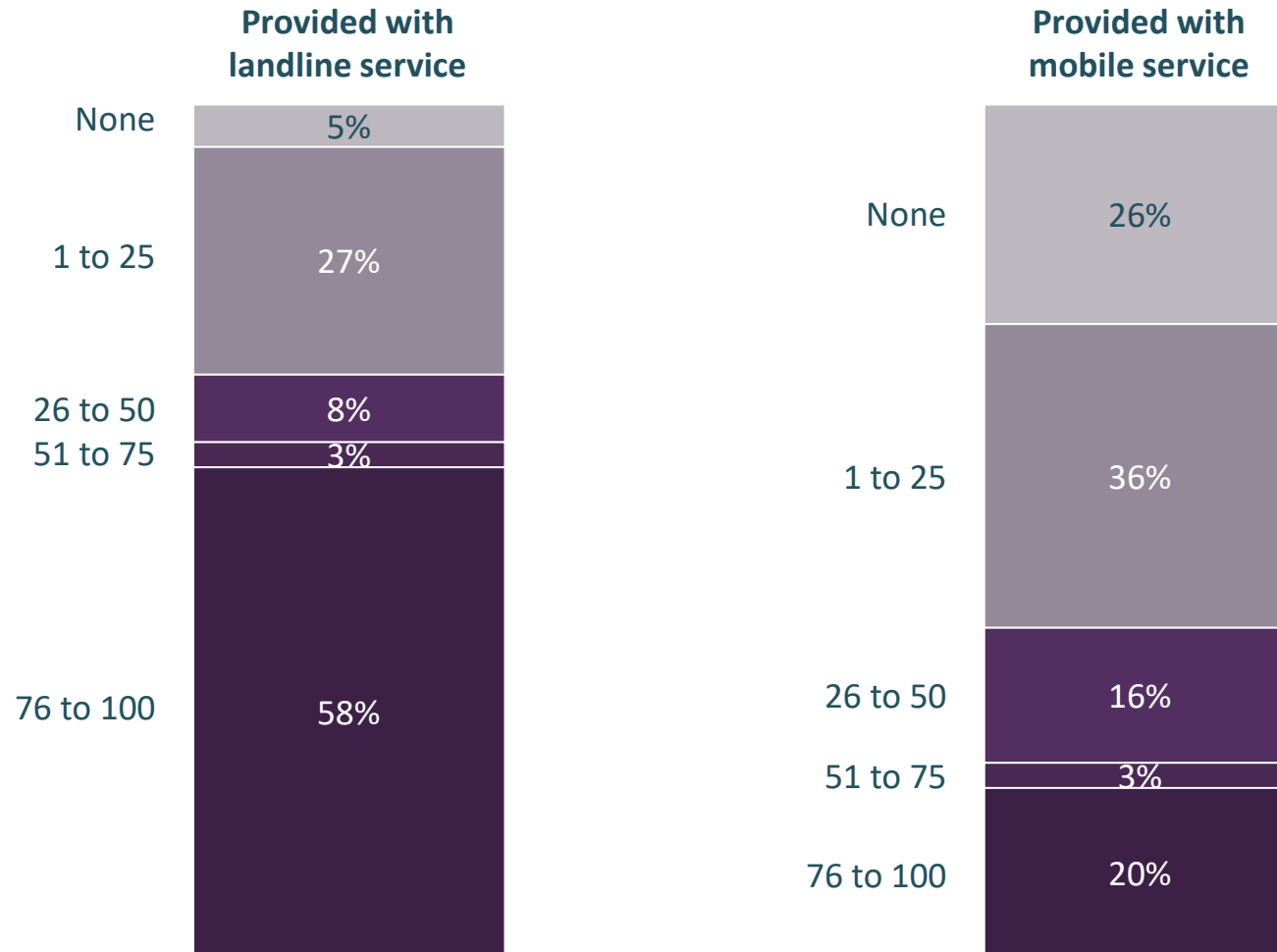


Of those businesses which use PBX services, over half say there is not an IP based system, with less than 1 in 3 using an IP based system.

Proportion of Employees provided with a Phone Service

(Base: All telecoms decision makers with fixed landline telephone, n=390)

Q. What proportion of employees are provided with the following?

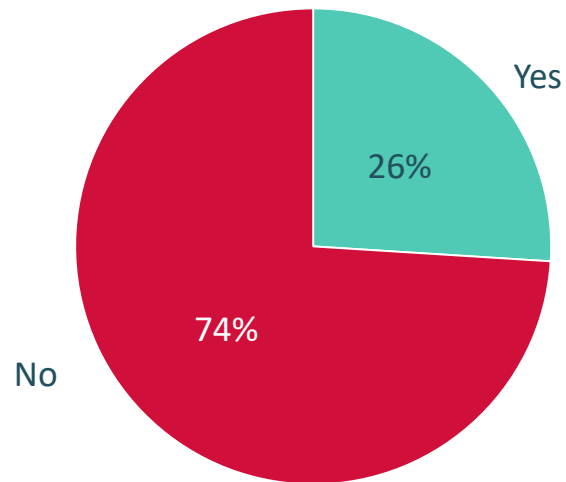


Just over 60% of businesses report that 50% or more of their employees are provided with a landline service. However, only 23% of businesses provide a mobile phone service to 50% or more of their employees.

Skype/(Unmanaged VoIP) Internet Based Voice Application Usage

(Base: All telecoms decision makers with fixed or mobile broadband, n=383)

Q. Does your organisation use Skype or other internet-based voice applications such as WhatsApp, Facetime, Snapchat, Viber, etc.?



	Company size			Region			
	Micro (1-10) (n=242)	Small (11-50) (n=116)	Medium (50-249) (n=25*)	Dublin (n=100)	ROL (n=93)	Munster (n=107)	Conn/ Ulster (n=83)
Yes	25%	26%	39%	31%	29%	22%	20%
No	74%	74%	61%	69%	71%	77%	80%

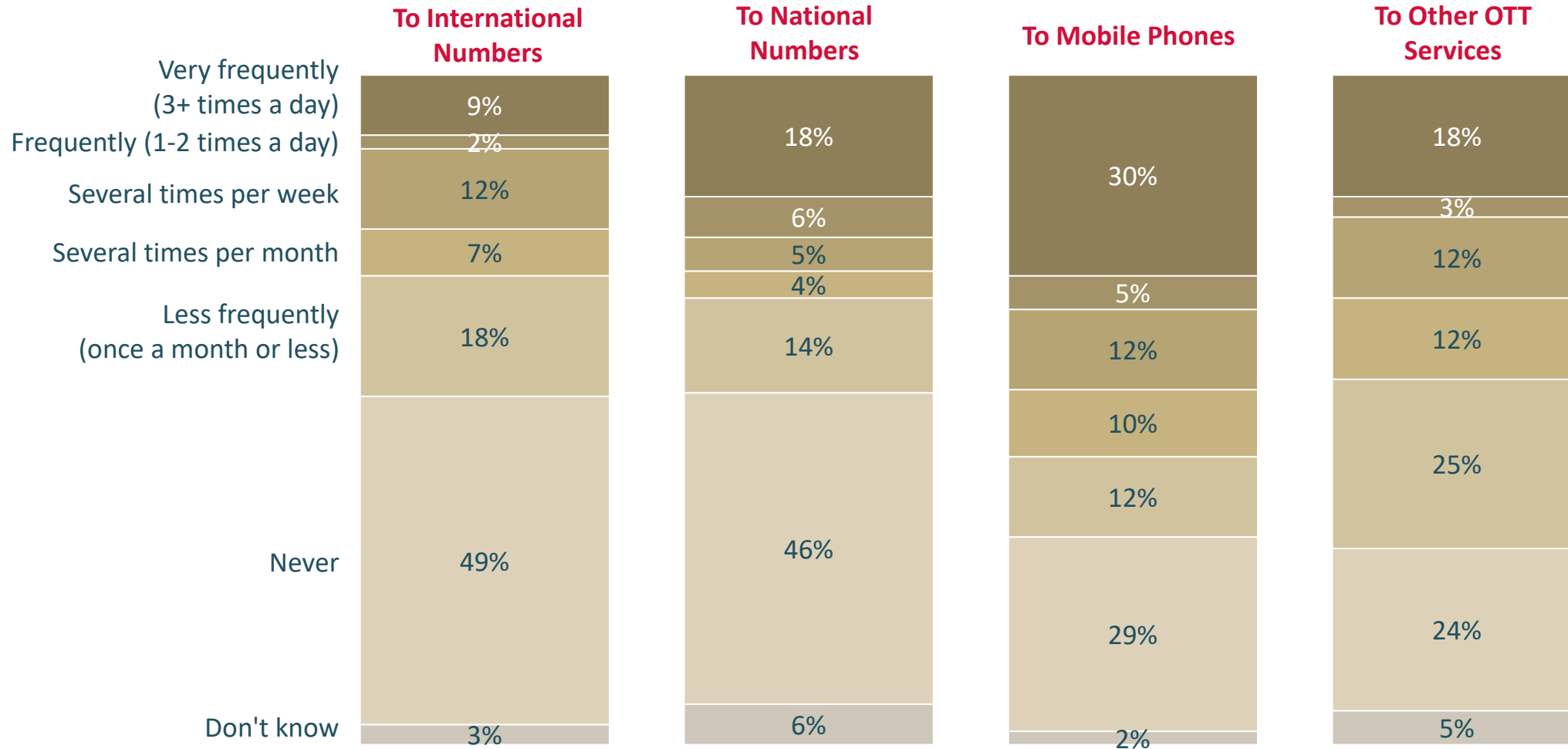
1 in 4 businesses use Skype/Internet based voice applications. The use of such applications is more common among medium sized companies and those based in Dublin.

* Caution: Small Base

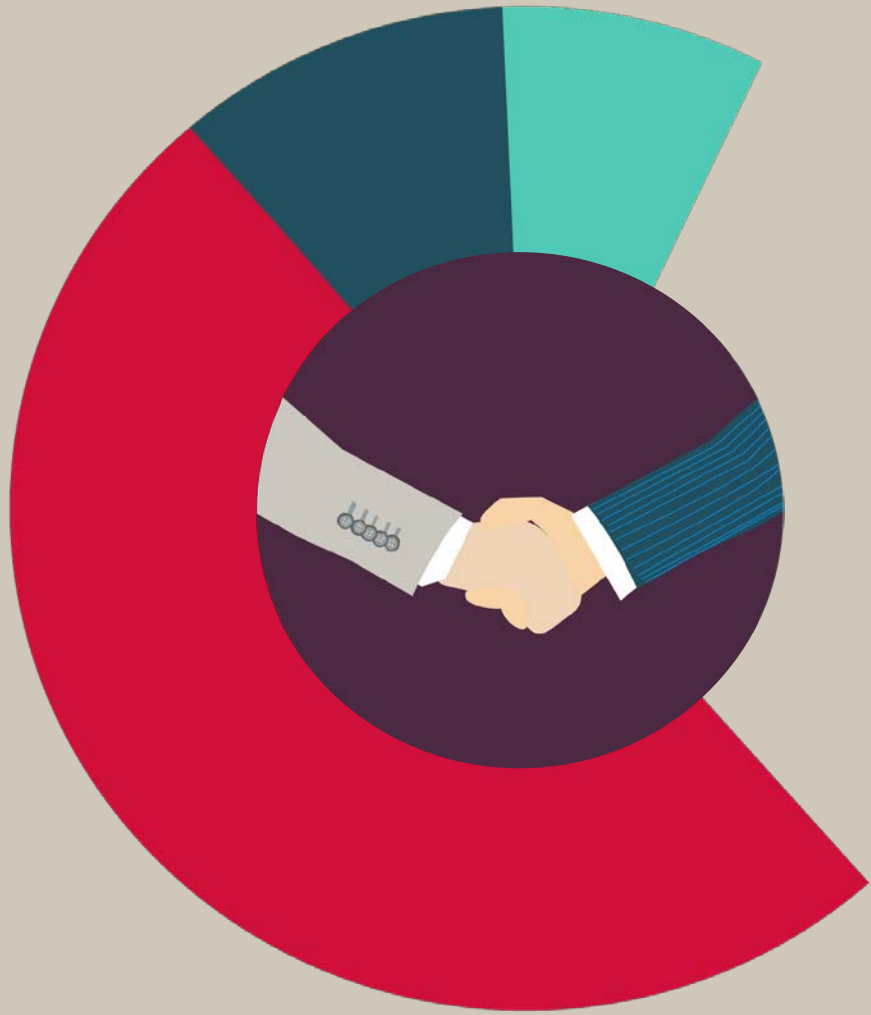
Frequency use of Skype/Internet Based Voice Applications

(Base: All telecoms decision makers who use Skype or other internet based voice applications, n=102)

Q. Thinking about the calls made in a typical month by all employees, using Skype or other internet-based voice applications, please indicate how often they use these applications for each of the following.



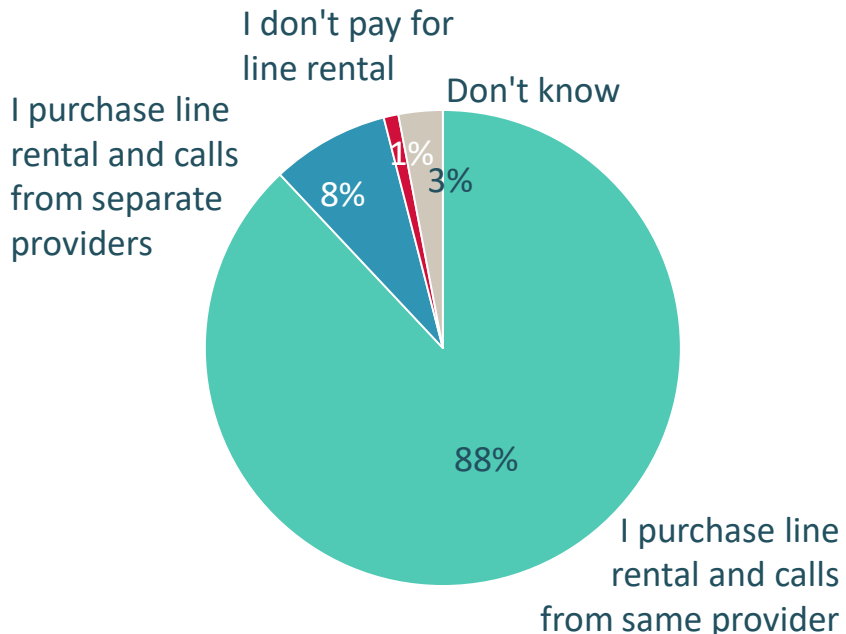
Frequency of Skype/Internet based calls is highest when made to mobile phones.



Business Fixed Landline: Bundles & Price

Prevalence of actively used Fixed Landline Telephones

(Base: All telecoms decision makers who purchase fixed landline telephone, n=374)



I purchase line rental and calls from same provider

I purchase line rental and calls from separate providers

I don't pay for line rental

Don't know

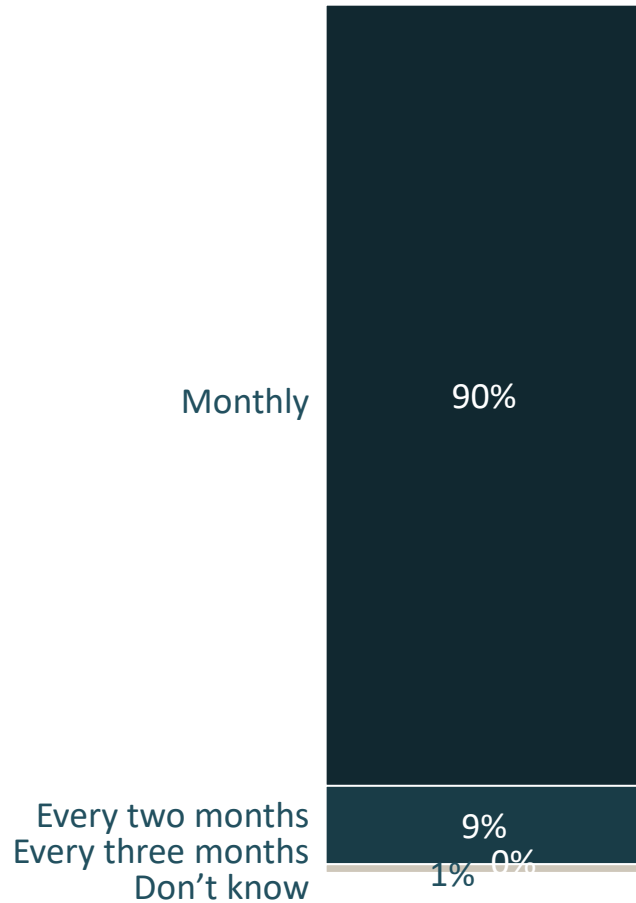
	Company size			Region			
	Micro (1-10)	Small (11-50)	Medium (50-249)	Dublin	ROL	Munster	Conn/ Ulster
I purchase line rental and calls from same provider	88%	88%	91%	88%	90%	88%	86%
I purchase line rental and calls from separate providers	8%	9%	9%	8%	8%	5%	13%
I don't pay for line rental	1%	2%	0	2%	1%	1%	0
Don't know	3%	2%	0	1%	2%	5%	2%

Just under 9 in 10 businesses report purchasing line rental and calls from the same provider. Less than 10% say they purchase these services from separate providers.

Billing Frequency

(Base: All telecoms decision makers with fixed landline telephone, n=390)

Q. How often do you receive a bill from the main provider of your fixed landline phone?
This can be printed, online or via email.



	Company size		
	Micro (1-10) (n=248)	Small (11-50) (n=117)	Medium (50-249) (n=25*)
Monthly	89%	91%	95%
Every two months	9%	7%	5%
Every three months	*	2%	0%
Don't know	1%	0%	0%

9 in 10 businesses receive their bills on a monthly basis, with no significant difference among various company sizes.

* Caution: Small Base

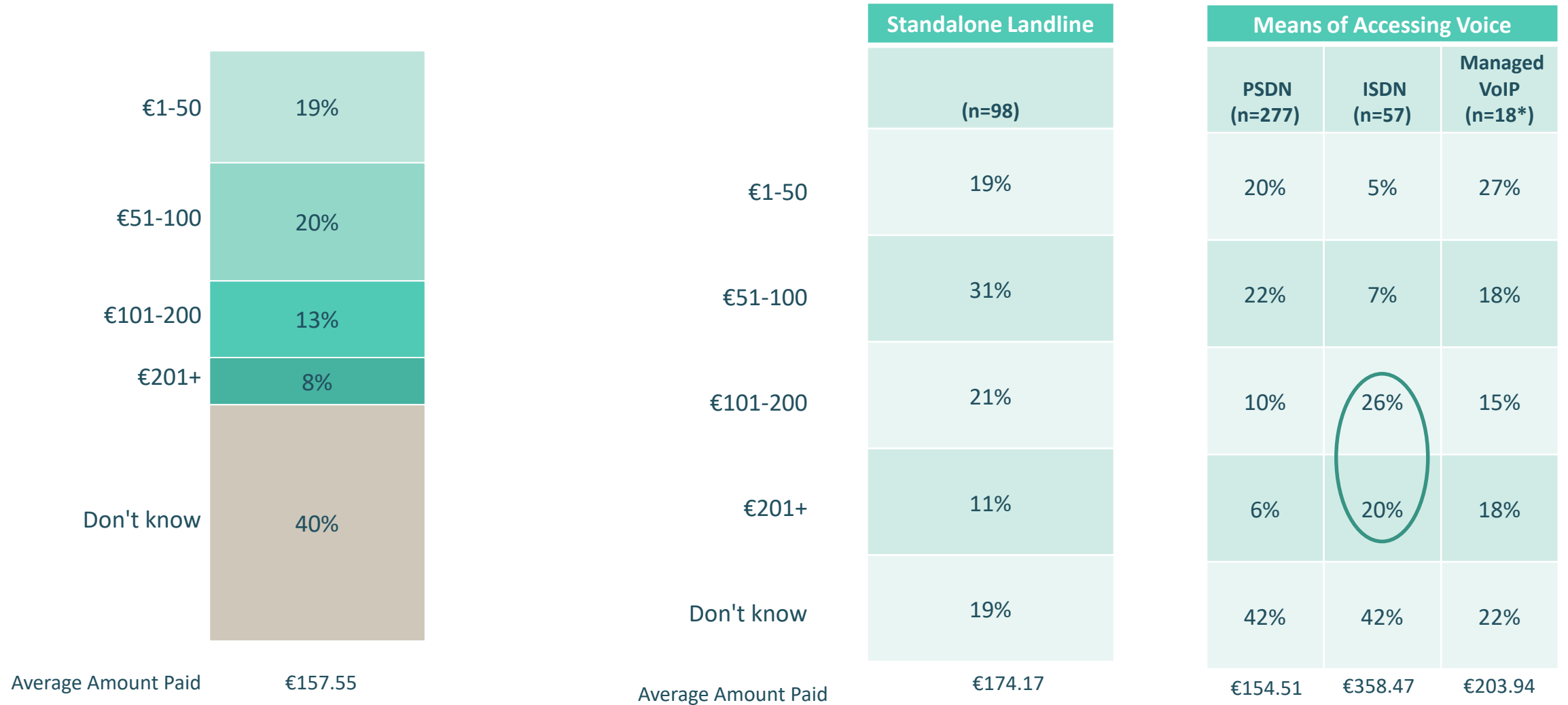
(Q.26)

Amount paid for Fixed Landline Telephone - Calls & Line Rental combined

Q. How much do you pay per billing period for the line rental and calls?

* Caution: Small Base

(Base: All businesses with fixed landline telephone who purchase calls and line rental from same provider, n=330)



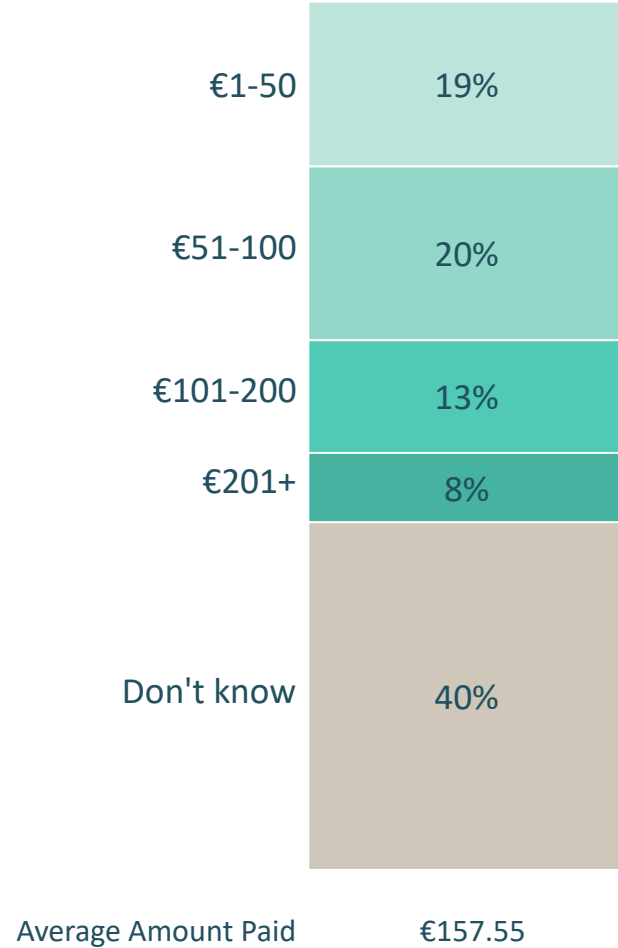
1 in 5 pay less than €50 for fixed landline services (calls and line rental), while a similar proportion report paying between €50-€100. Those with ISDN are much more likely to pay a higher amount than those with traditional means of accessing voice services.

Amount paid for Fixed Landline Telephone - Calls & Line Rental combined

Q. How much do you pay per billing period for the line rental and calls?

* Caution: Small Base

(Base: All businesses with fixed landline telephone who purchase calls and line rental from same provider, n=330)



	Company size		
	Micro (1-10) (n=210)	Small (11-50) (n=101)	Medium (50-249) (n=19*)
€1-50	20%	14%	0%
€51-100	21%	21%	0%
€101-200	14%	9%	9%
€201+	5%	16%	44%
Don't know	40%	40%	47%

Average Amount Paid: €121.11 (Micro), €155.35 (Small), €1574.56 (Medium)

	Region			
	Dublin (n=84)	ROL (n=83)	Munster (n=92)	Conn/ Ulster (n=71)
€1-50	10%	22%	21%	25%
€51-100	14%	24%	22%	22%
€101-200	16%	9%	12%	13%
€201+	11%	5%	8%	7%
Don't know	49%	40%	36%	33%

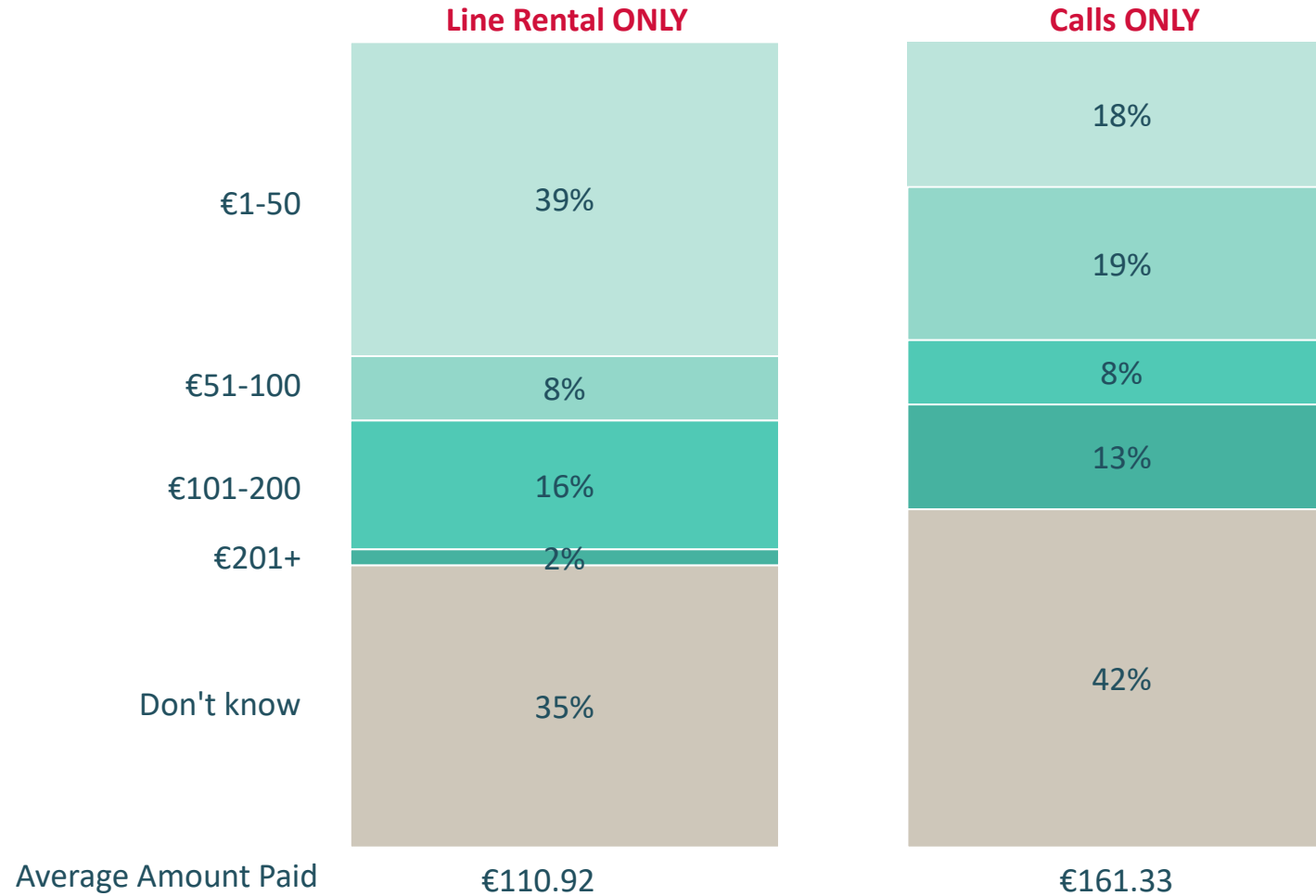
Average Amount Paid: €292.54 (Dublin), €99.53 (ROL), €118.88 (Munster), €111.63 (Conn/ Ulster)

1 in 5 pay less than €50 for fixed landline service (calls and line rental), while a similar proportion report paying between €50-€100. 2 in 5 businesses say they don't know the amount they pay for fixed landline telephone (both calls and line rental).

Amount paid for Fixed Landline Telephone

Q. How much do you pay per billing period for line rental only?

(Base: All telecoms decision makers with fixed landline telephone who purchase calls and line rental from separate providers, n=31*)



* Caution: Small Base

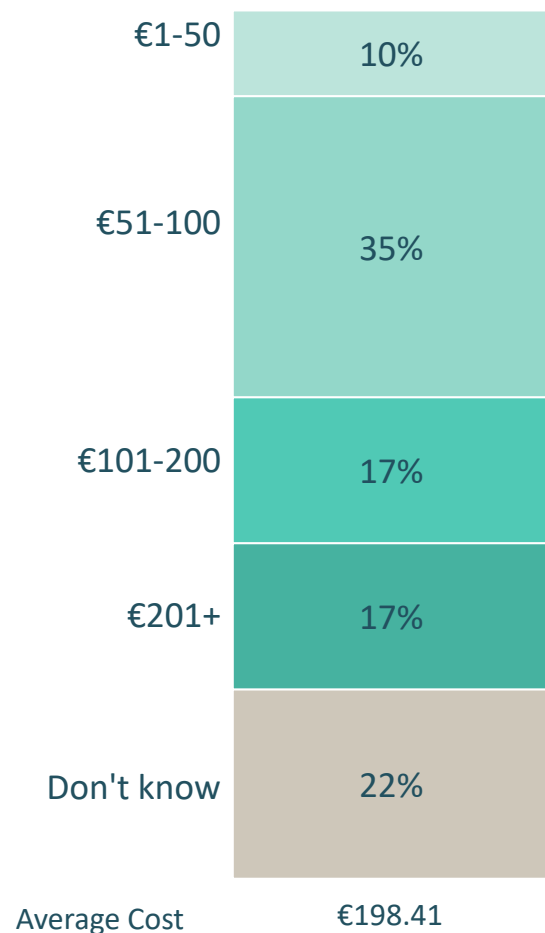
Just under 2 in 5 of the businesses who purchase line rental and calls from separate providers report paying less than €50 for their line rental, while a similar proportion purchase their calls for less than €100.

Cost of Bundled Services

(Base: All businesses with a bundle, n=250)

Q. What would your total bill typically be for all your bundled communication services [INSERT SERVICES SELECTED AT Q.18]

* Caution: Small Base

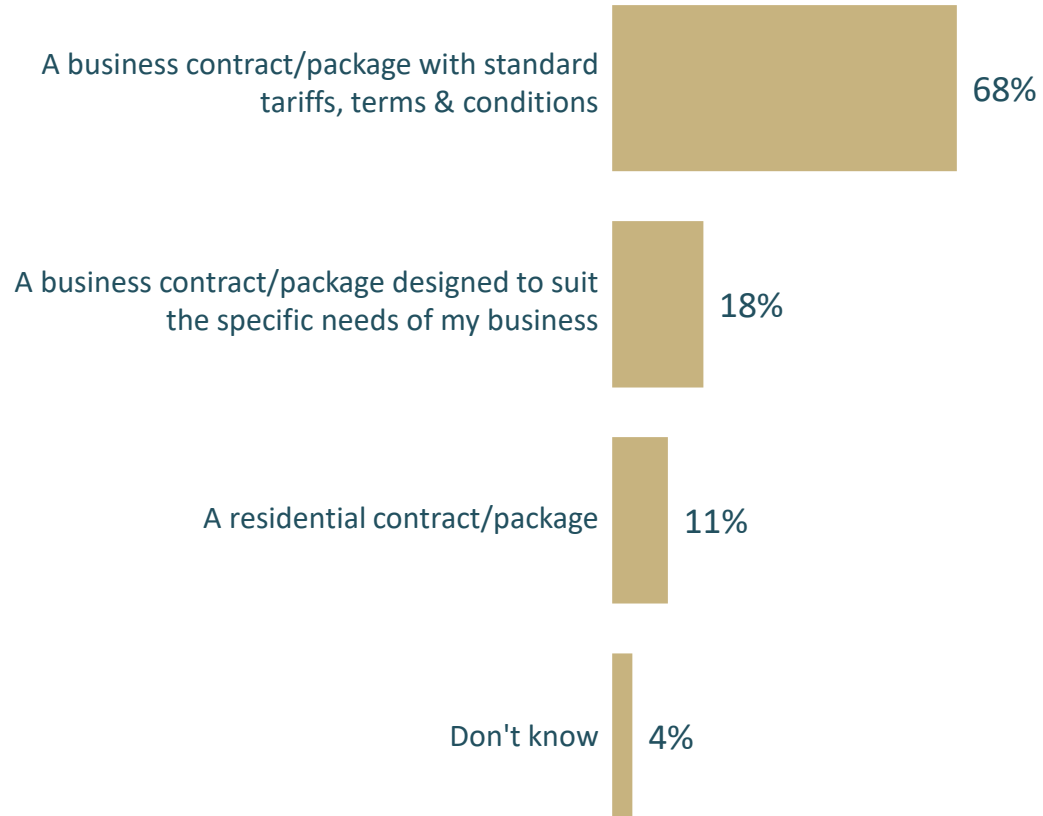


	Company size			Region			
	Micro (1-10) (n=159)	Small (11-50) (n=76)	Medium (50-249) (n=15*)	Dublin (n=64)	ROL (n=63)	Munster (n=66)	Conn/ Ulster (n=57)
€1-50	10%	13%	0	9%	11%	8%	13%
€51-100	40%	18%	0	32%	43%	36%	28%
€101-200	17%	18%	6%	15%	20%	13%	20%
€201+	15%	24%	43%	18%	12%	20%	16%
Don't know	19%	28%	51%	26%	14%	22%	23%
	€139.44	€259.13	€2,896.53	€317.58	€133.21	€151.17	€177.13

Over a third of those businesses who purchase their services as part of a bundle, report this to cost between €50-100. These are more likely to be micro sized companies and those based in Leinster. Larger companies tend to spend over €200.

Type of Service Agreement with Fixed Landline Service Provider

(Base: All Telecoms Decision Makers With Fixed Landline Telephone, n=390)



Company size		
Micro (1-10) (n=248)	Small (11-50) (n=117)	Medium (50-249) (n=25*)
67%	72%	65%
16%	21%	35%
13%	3%	0%
4%	5%	0%

Q. Which best describes the service agreement between the provider of your fixed landline telephone service and your business? If you have more than one provider, please consider your main provider here.

2 in 3 have a business contract with standard tariffs and Ts&Cs with their telecoms service provider. Larger companies are more likely to have bespoke packages, while most of those on residential contracts are micro sized companies.

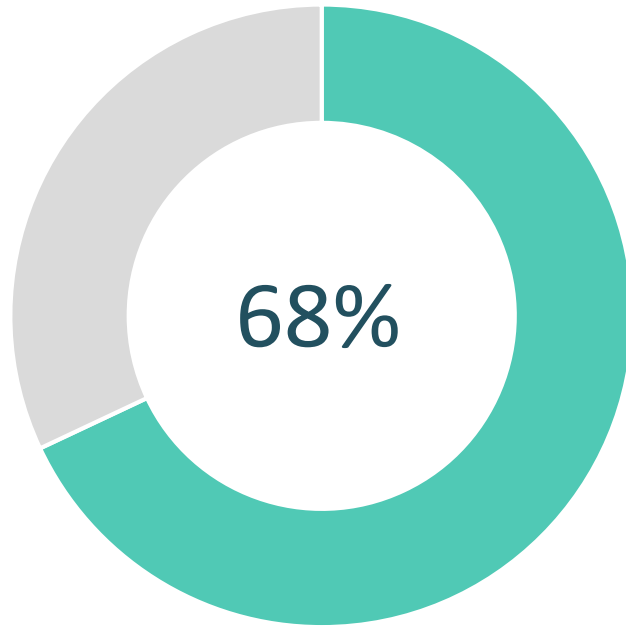
* Caution: Small Base

Number of inclusive Minutes

(Base: All telecoms decision makers with fixed landline telephone, n=390)

Q. In your call package, how many inclusive minutes, if any are included for each of the following call types?

Any Unlimited number of minutes



Company size		
Micro (1-10)	Small (11-50)	Medium (50-249)
66%	79%	64%

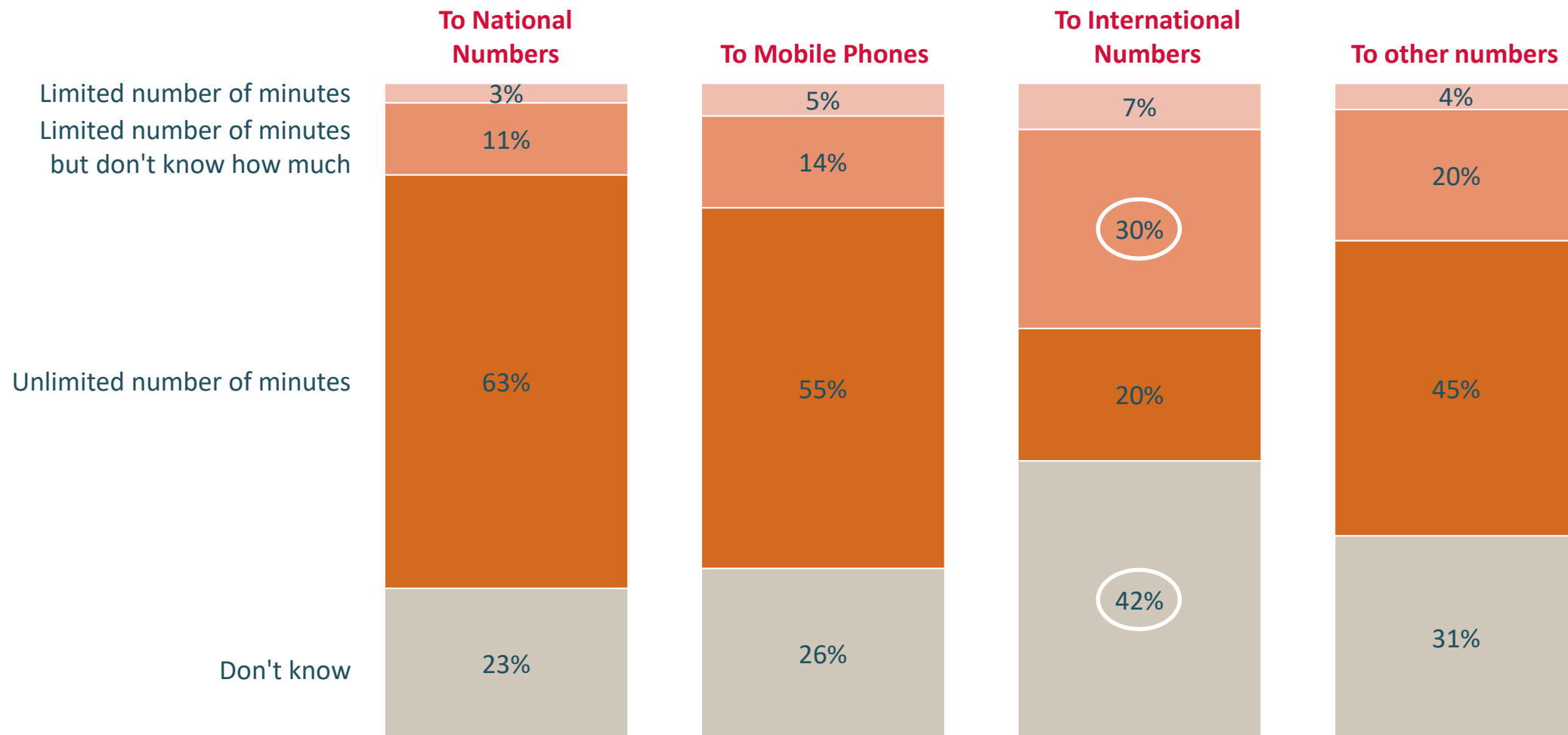
Region			
Dublin	ROL	Munster	Conn/ Ulster
76%	69%	59%	67%

68% of businesses report having unlimited minutes for any call type. Small companies, and those based in Dublin, are more likely to have inclusive minutes as part of their package.

Number of Inclusive Minutes

(Base: All telecoms decision makers with fixed landline telephone, n=390)

Q. In your call package, how many inclusive minutes, if any, are included for each of the following call types?

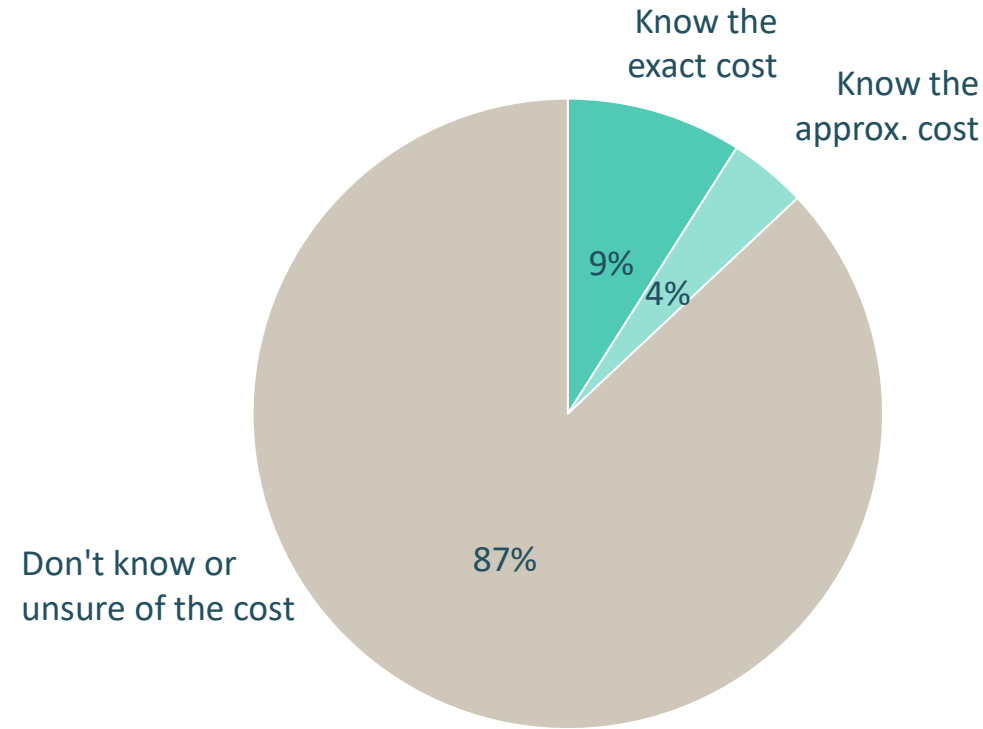


Majority of the businesses report having unlimited number of minutes to national and mobile phone numbers, while over 2 in 5 don't know their allowance in relation to international numbers, and a further 30% believe this to be a limited number of minutes.

Awareness of Cost of making calls outside Plan

(Base: All telecoms decision makers with fixed landline telephone without unlimited call allowance, n=51)

Q. Do you know the cost of making calls from your business' fixed landline phone to other national fixed landline phones in instances where you have to pay for the call (i.e. outside of the number of minutes included on the plan)?

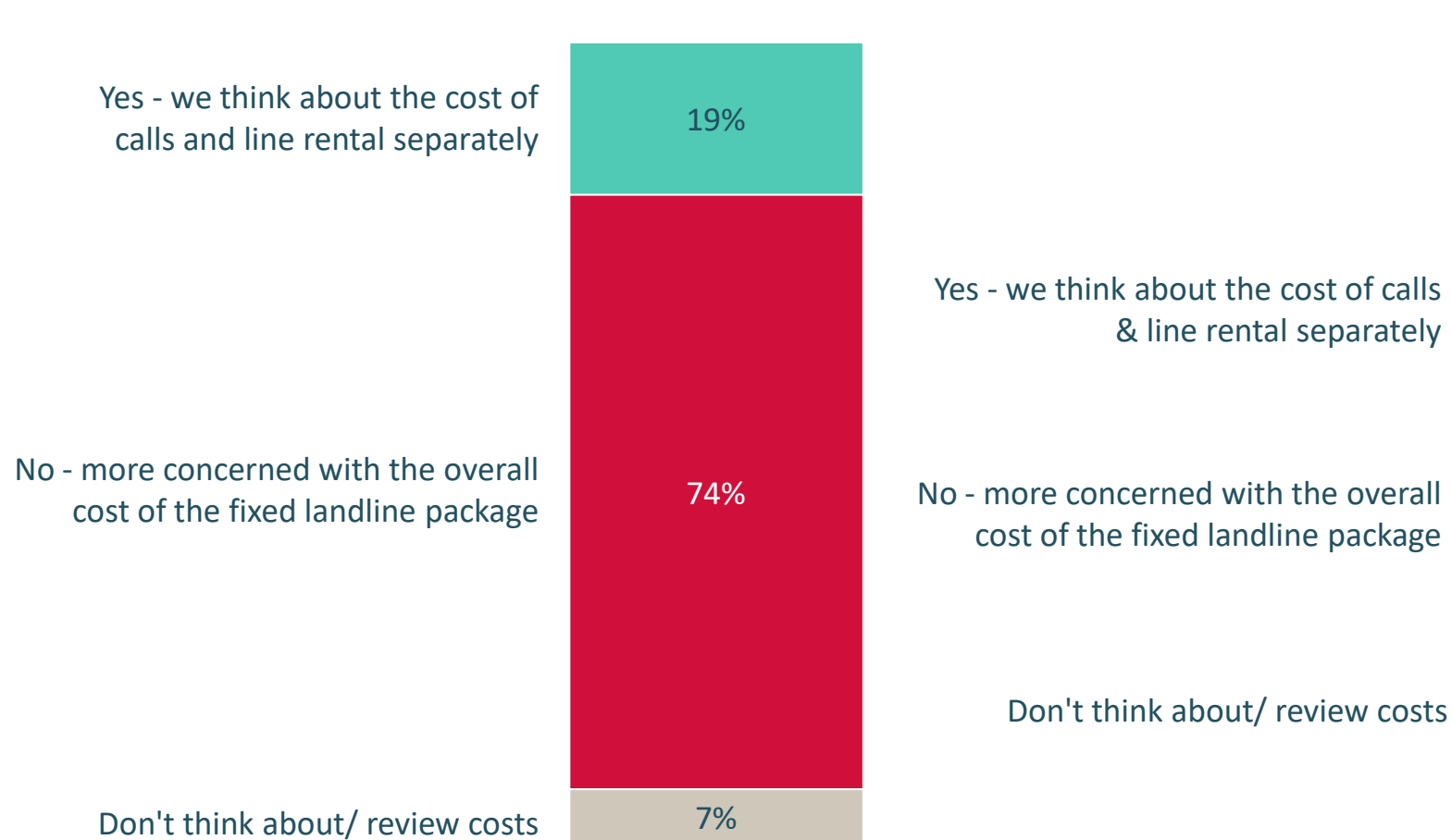


Overwhelming majority of businesses don't know, or are unsure, of the cost of making calls outside their plan. Less than 1 in 10 report knowing the exact cost of making calls outside their plan, with a further 4% saying they know the approx. cost.

Reviewing cost of Calls & Line Rental

(Base: All telecoms decision makers with fixed landline telephone, n=361)

Q. When you are thinking about and reviewing the cost of fixed telecommunication services for your business, do you think about the cost of calls and line rental separately?



Company size			
Micro (1-10) (n=229)	Small (11-50) (n=111)	Medium (50-249) (n=21*)	
Yes - we think about the cost of calls & line rental separately	18%	23%	23%
No - more concerned with the overall cost of the fixed landline package	74%	69%	77%
Don't think about/ review costs	8%	8%	0%

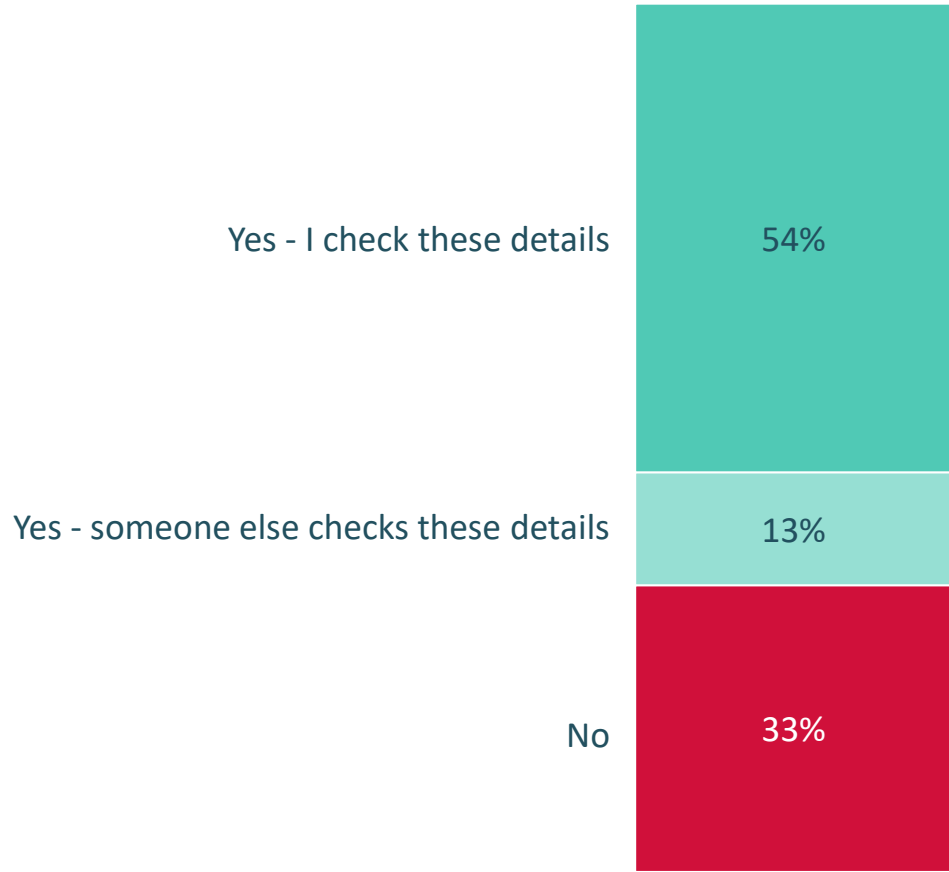
1 in 5 businesses say they review the cost of calls and line rental separately, while just under 2 in 3 businesses report to be mainly concerned with the overall cost of their telecommunication package, and not the individual components.

* Caution: Small Base

Checking Bill Details

(Base: All telecoms decision makers with fixed landline telephone, n=390)

Q. Do you or someone else in your organisation check the details of fixed landline phone bills or usage statistics you receive?



	Company size		
	Micro (1-10) (n=248)	Small (11-50) (n=117)	Medium (50-249) (n=25*)
Yes - I check these details	52%	62%	44%
Yes - someone else checks these details	13%	13%	21%
No	35%	25%	35%

* Caution: Small Base

(Q.36)

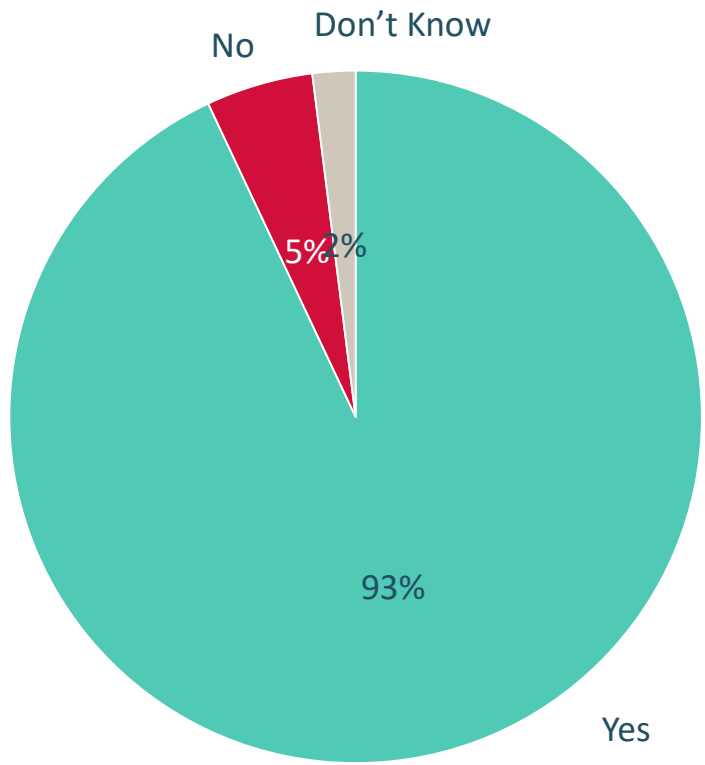


Over half of decision makers surveyed said they check the details of the telecommunications bills for their business. However, 1 in 3 revealed that they don't check these, nor does someone else in the business checks these details. Decision makers in small sized companies are more likely to say they check the bills.

Checking the total amount of Bill

(Base: All who check bill details, n=266)

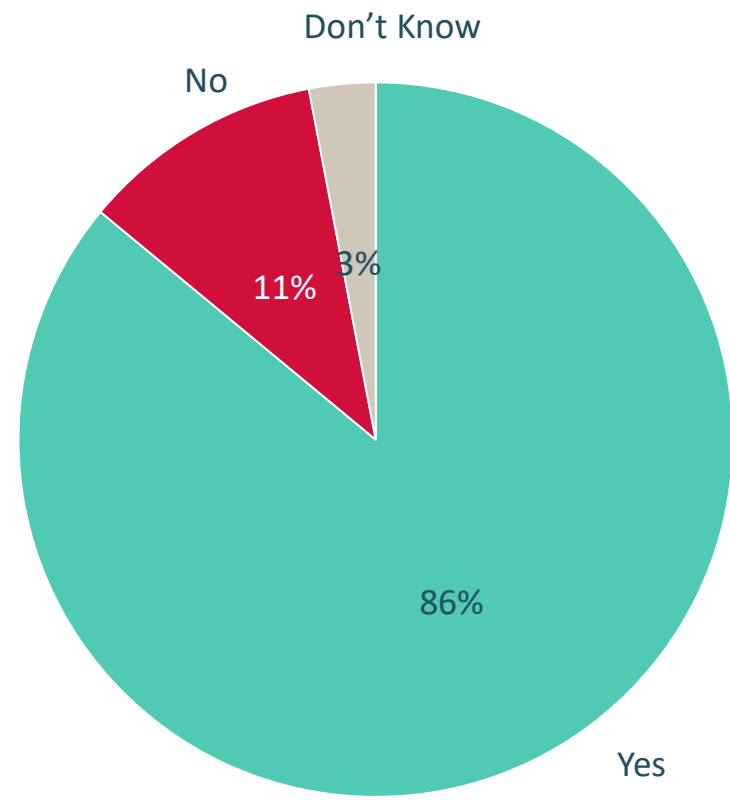
Q. Which of the following are usually checked on each bill?



Checking whether or not the amount is greater than the Bundle Price

(Base: All who check bill details, n=266)

Q. Which of the following are usually checked on each bill?

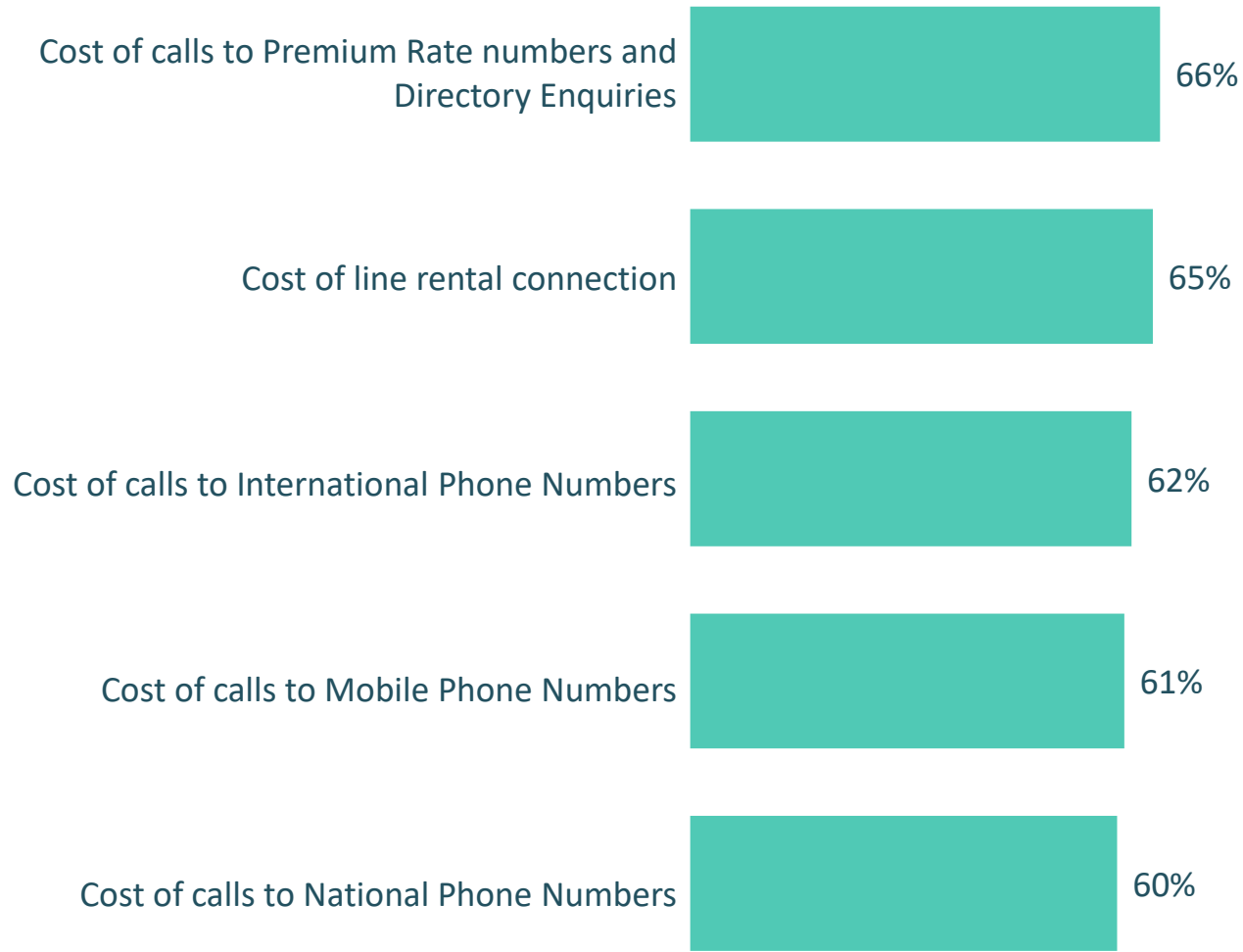


Of those who report checking the details on the telecommunications bills, over 9 in 10 say they check the total amount on the bill. Over 8 in 10 also report checking whether or not the bill amount is greater than the expected bundle price.

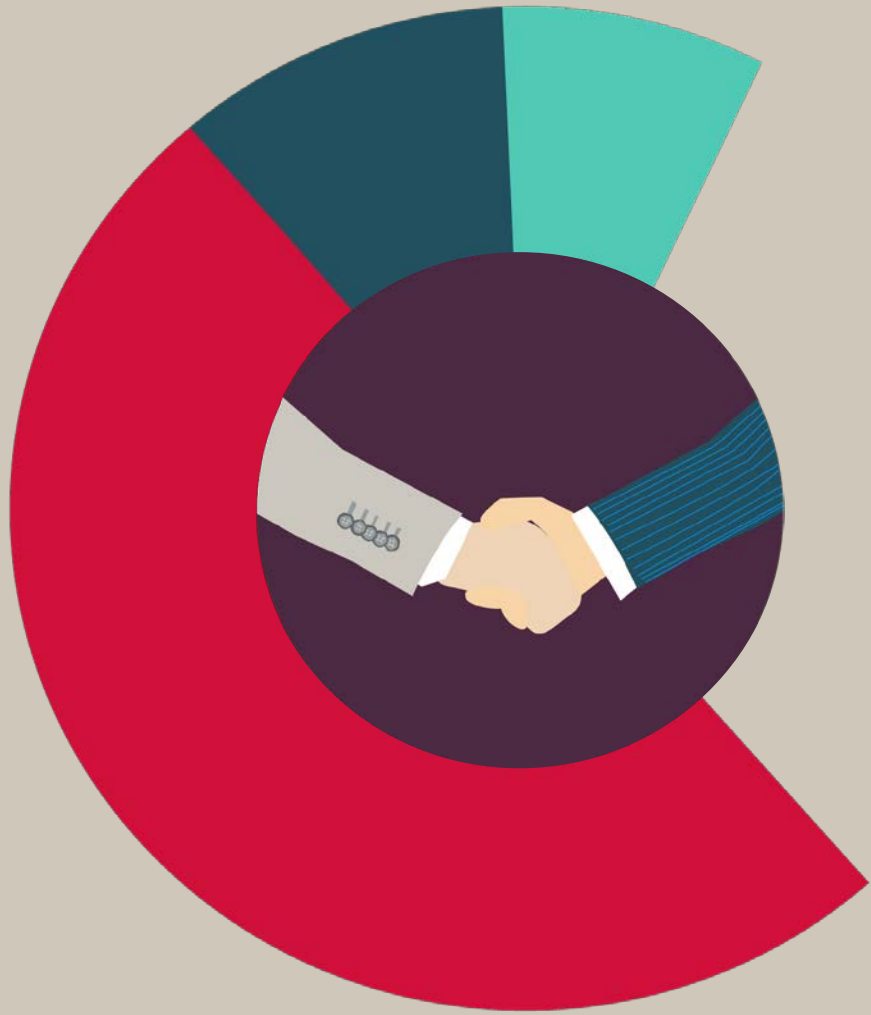
Details checked on Bill : The Cost of Calls

(Base: All who check bill details, n=266)

Q. Which of the following are usually checked on each bill?



Calls to premium rate numbers and cost of line rental are the top two costs checked by decision makers, closely followed by cost of calls to international phone numbers, mobile phone numbers and national phone numbers.

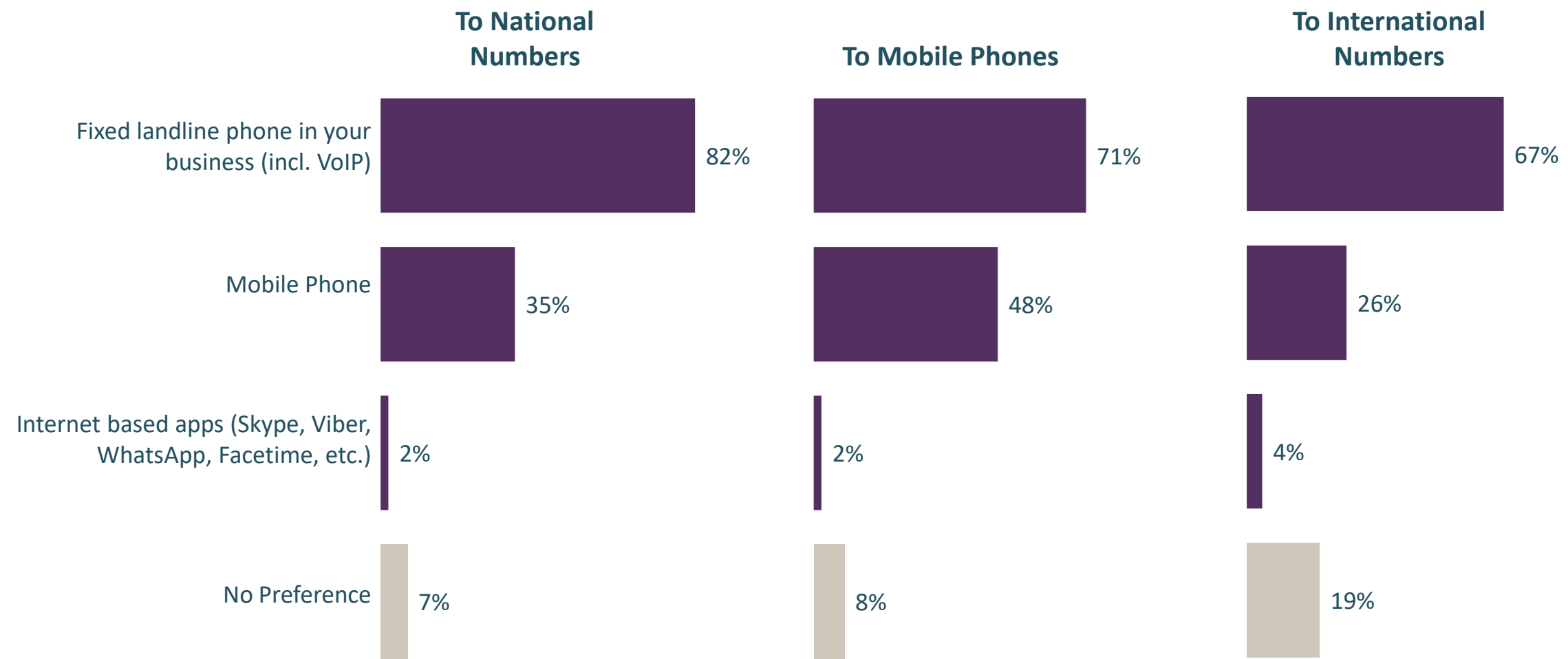


Fixed Landline Usage, Patterns & Awareness

Most frequent method for making Calls

(Base: All telecoms decision makers with fixed landline telephone, n=390)

Q. Thinking about the types of calls your employees make from your business premises, please select what your employees would primarily use for each of the following call types. If there are several options which your employees would primarily use, please select multiple options.

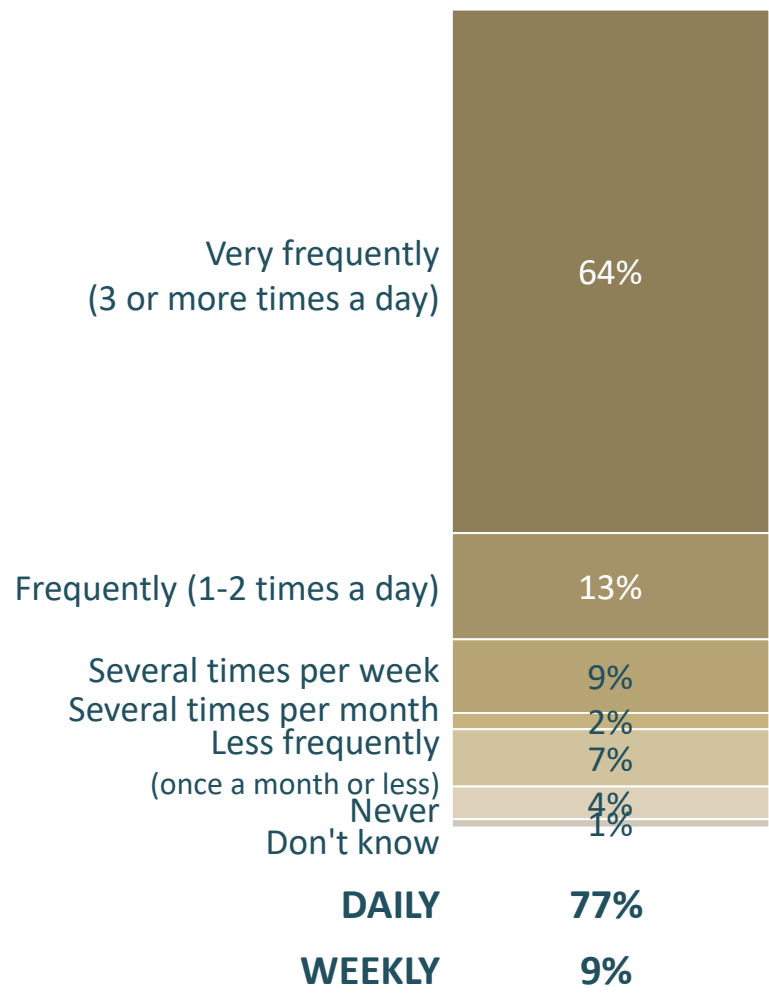


Fixed landline is preferred as the main method of making calls, followed by mobile phones. Fixed landlines are more likely to be used when making calls to national numbers, while mobile phones are preferred when making calls to other mobile phones.

Frequency of Employees using Fixed Landline Phone to make Calls

(Base: All telecoms decision makers with fixed landline telephone where employees provided with landline, n=374)

Q. How frequently do your employees use their fixed landline phone to make calls?



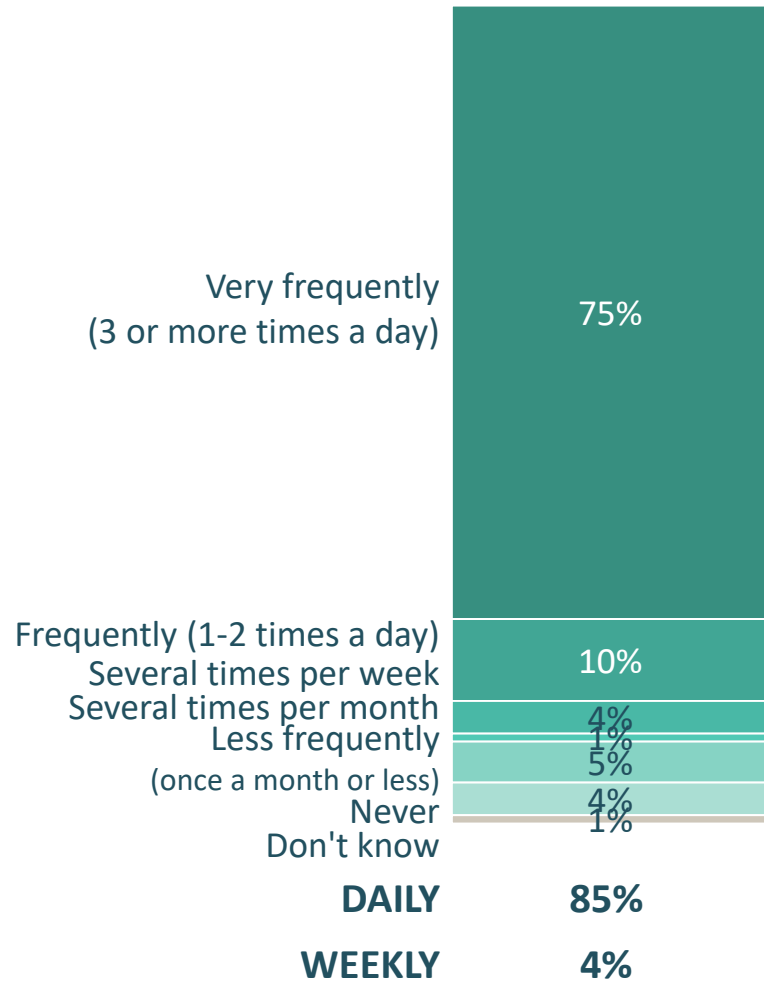
	Company size			Region			
	Micro (1-10) (n=238)	Small (11-50) (n=115)	Medium (50-249) (n=21*)	Dublin (n=94)	ROL (n=92)	Munster (n=107)	Conn/ Ulster (n=81)
Very frequently (3 or more times a day)	61%	74%	71%	72%	57%	60%	63%
Frequently (1-2 times a day)	14%	10%	14%	12%	17%	10%	17%
Several times per week	10%	8%	5%	5%	12%	11%	10%
Several times per month	2%	2%	0	2%	3%	1%	1%
Less frequently (once a month or less)	8%	3%	0	2%	7%	13%	4%
Never	4%	4%	5%	6%	3%	4%	3%
Don't know	1%	0	5%	1%	1%	1%	2%
DAILY	75%	84%	85%	84%	74%	70%	80%
WEEKLY	10%	8%	5%	5%	12%	11%	10%

In just under 2 in 3 businesses, employees very frequently use fixed landline phones to make calls. Use of fixed landline is most frequent in larger companies.

Frequency of Employees using Fixed Landline Phone to receive Calls

Q. How frequently do your employees use their fixed landline phone to receive calls?

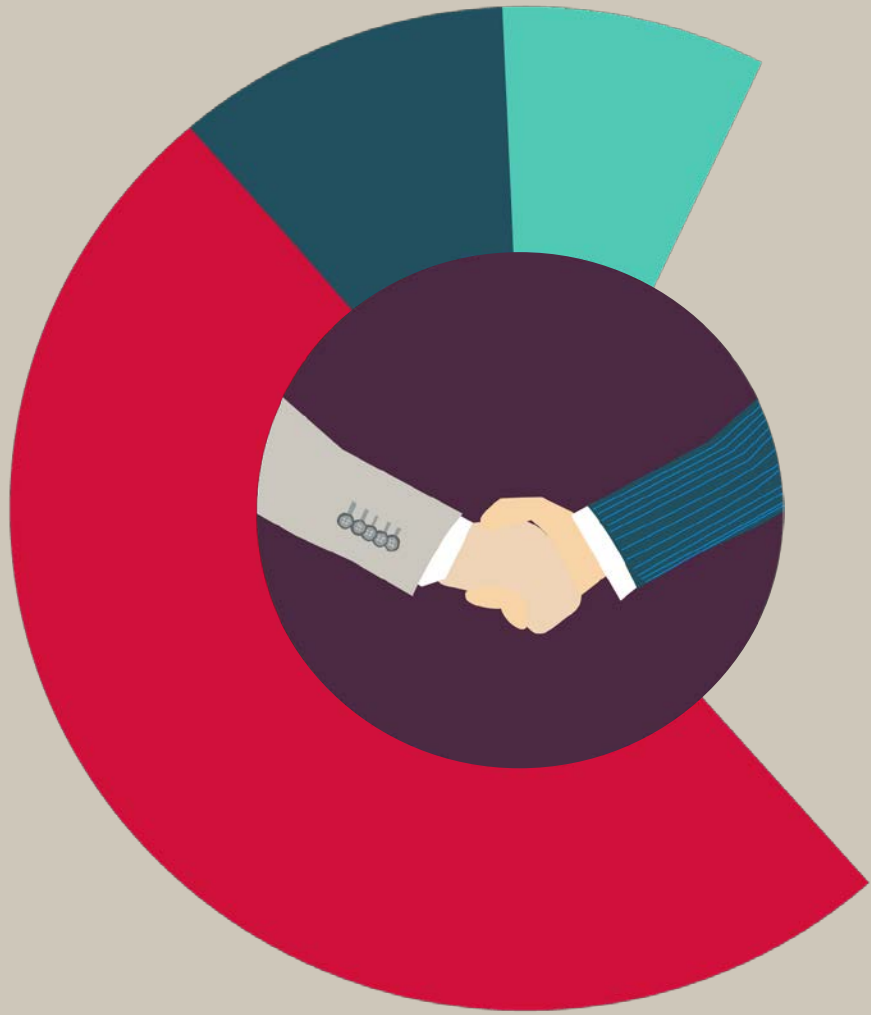
(Base: All telecoms decision makers with fixed landline telephone where employees provided with landline, n=374)



	Company size			Region			
	Micro (1-10) (n=238)	Small (11-50) (n=115)	Medium (50-249) (n=21*)	Dublin (n=94)	ROL (n=92)	Munster (n=107)	Conn/ Ulster (n=81)
Very frequently (3 or more times a day)	74%	81%	81%	79%	74%	73%	76%
Frequently (1-2 times a day)	10%	11%	6%	12%	12%	8%	9%
Several times per week	5%	4%	0%	2%	5%	7%	4%
Several times per month	1%	1%	0%	2%	1%	1%	1%
Less frequently (once a month or less)	5%	2%	0%	0%	3%	9%	7%
Never	4%	1%	9%	5%	5%	1%	4%
Don't know	1%	0%	5%	*	0%	2%	0%
DAILY	84%	93%	86%	91%	86%	81%	84%
WEEKLY	5%	4%	0%	2%	5%	7%	4%

* Caution: Small Base

In 3 in 4 businesses, employees very frequently use fixed landline phones to receive calls. Larger companies and those based in Dublin – perhaps due to higher volume of calls – report a higher frequency of receiving calls on fixed landline phones.

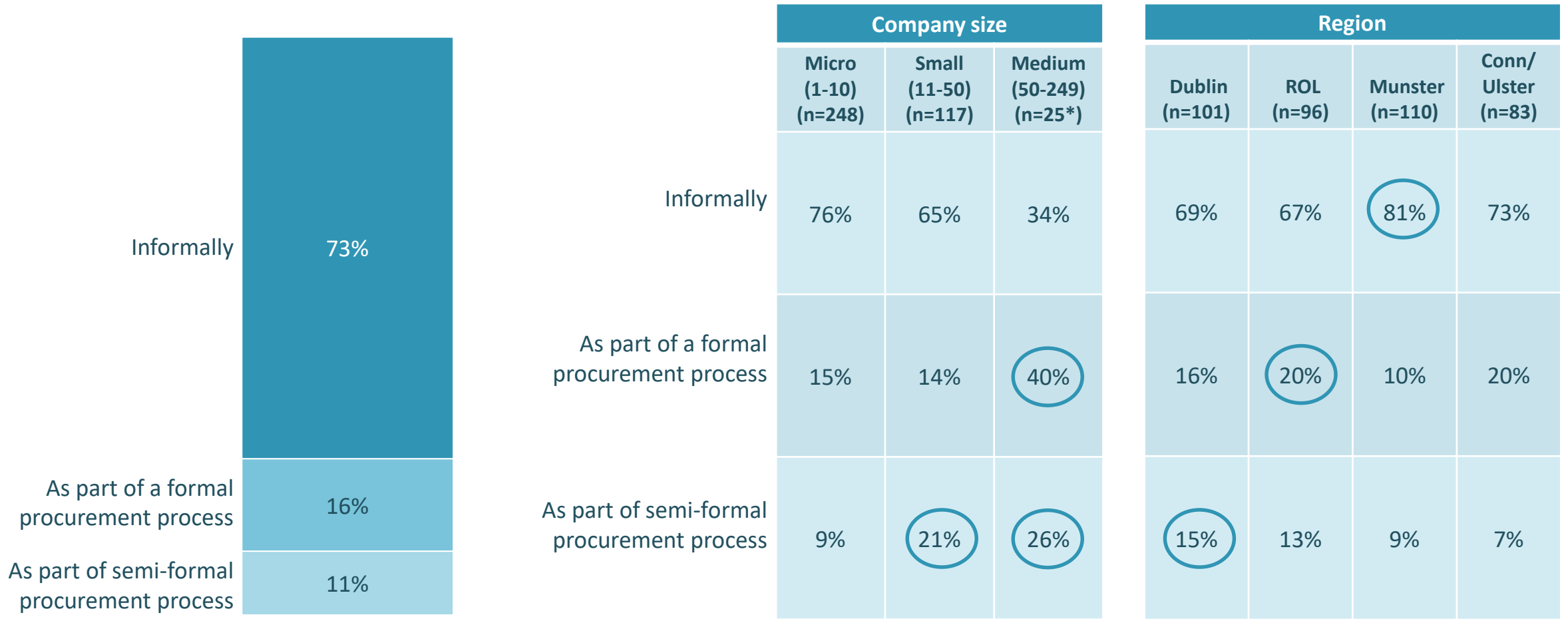


Switching & Sticking

Approach to selecting a Fixed Landline Phone Provider

(Base: All telecoms decision makers with fixed landline telephone, n=390)

Q. Thinking about your business' approach to selecting a fixed landline phone provider, which of the following statements best capture this approach?



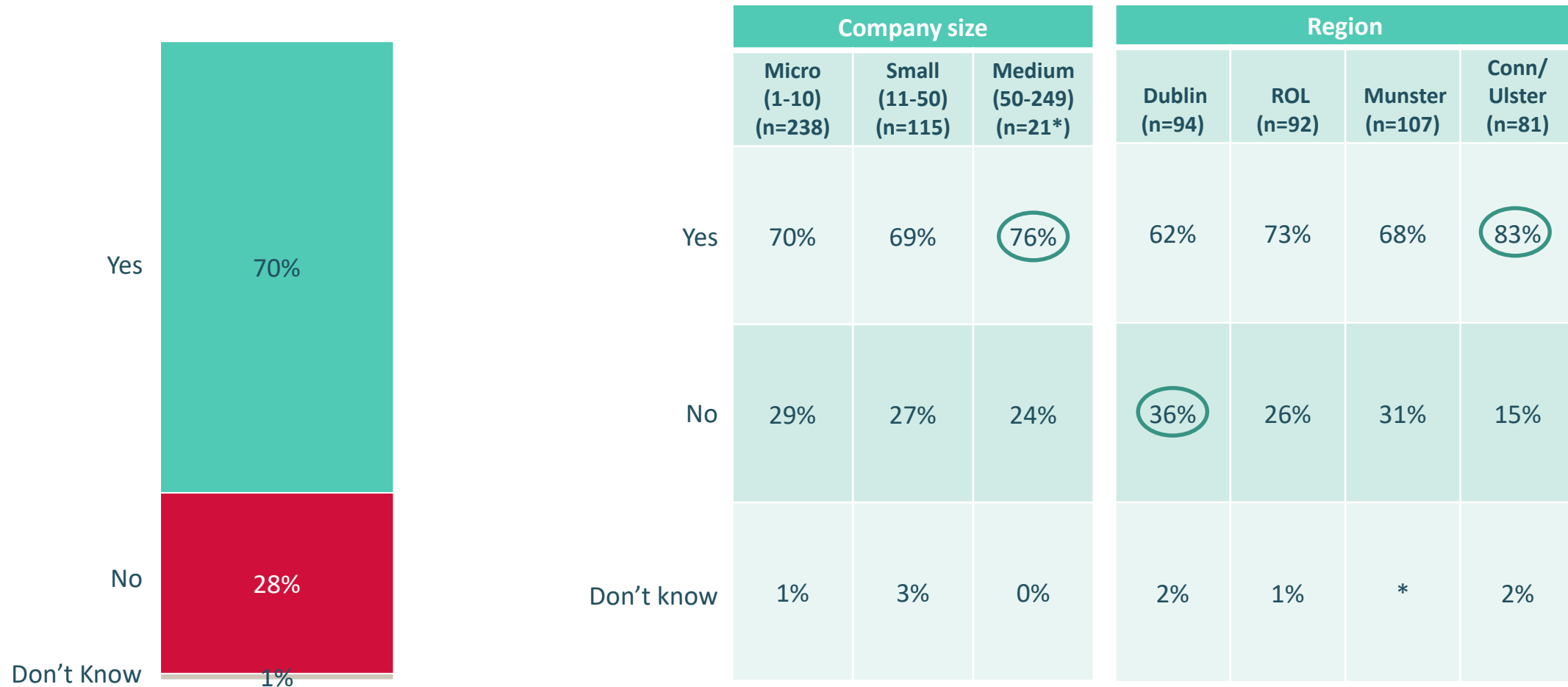
Just under 3 in 4 businesses report having an informal approach to selecting a fixed landline phone provider. Medium sized companies are more likely to select a provider as part of a procurement process (formal and semi-formal).

* Caution: Small Base

Incidence of reviewing Service Arrangement with Telecoms Provider - Past 3yrs

(Base: All telecoms decision makers with fixed landline telephone, n=374)

Q. Has your business reviewed its telecommunication service arrangement with your provider within the past 3 years?

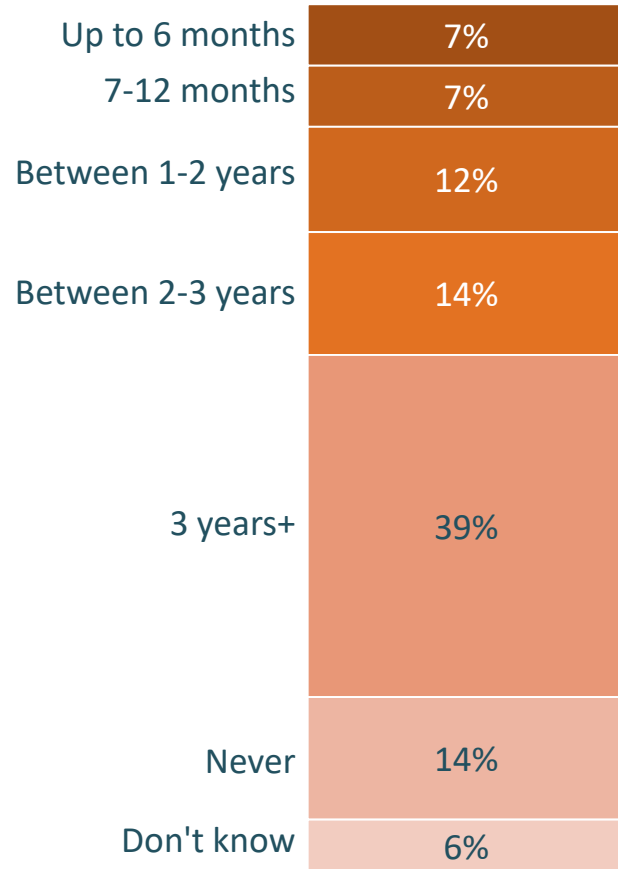


70% of businesses say they have reviewed their service arrangements with their telecoms provider in the past 3 years. Medium sized companies, and those based in Conn/Ulster, are more likely to say this.

* Caution: Small Base

Last occasion SME switched Fixed Landline Service Provider

(Base: All telecoms decision makers with fixed landline telephone, n=374)



	Company size		
	Micro (1-10) (n=238)	Small (11-50) (n=115)	Medium (50-249) (n=21*)
Up to 6 months	8%	6%	0%
7-12 months	8%	6%	9%
Between 1-2 years	13%	10%	8%
Between 2-3 years	13%	19%	8%
3 years+	39%	40%	38%
Never	14%	13%	20%
Don't know	6%	6%	16%

Q. When was the last time your business switched its fixed landline service provider? If you have more than one fixed landline provider please consider if you have switched any provider.

For 2 in 5 businesses, it has been over 3 years since they last switched providers for their fixed landline telephone service.

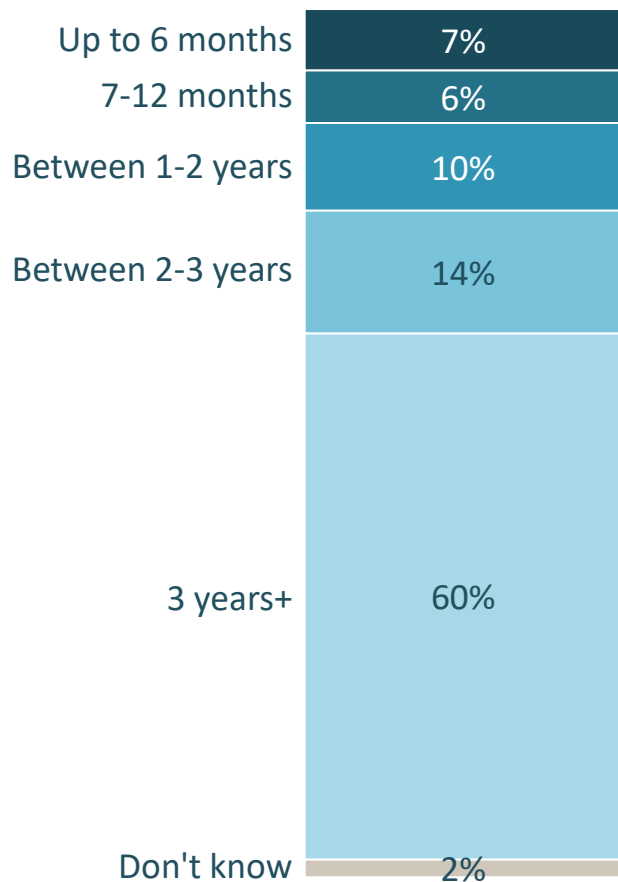
* Caution: Small Base

(Q.45)

Length of stay with current Fixed Landline Provider

(Base: All telecoms decision makers with fixed landline telephone, n=374)

Q. How long have you been with your current fixed landline phone service provider?



	Company size		
	Micro (1-10) (n=238)	Small (11-50) (n=115)	Medium (50-249) (n=21*)
Up to 6 months	7%	5%	11%
7-12 months	7%	5%	9%
Between 1-2 years	10%	11%	4%
Between 2-3 years	14%	18%	13%
3 years+	60%	59%	62%
Don't know	2%	3%	0%

* Caution: Small Base

(Q.46)

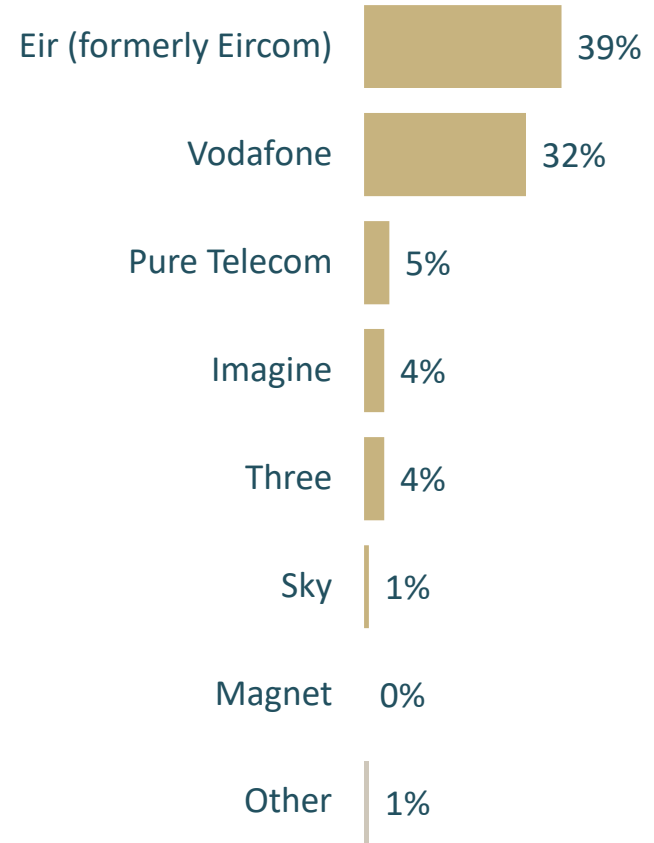
3 in 5 businesses have been with their current fixed landline provider for over 3 years.

Previous Fixed Landline details

(Base: All telecoms decision makers who have switched, n=103)

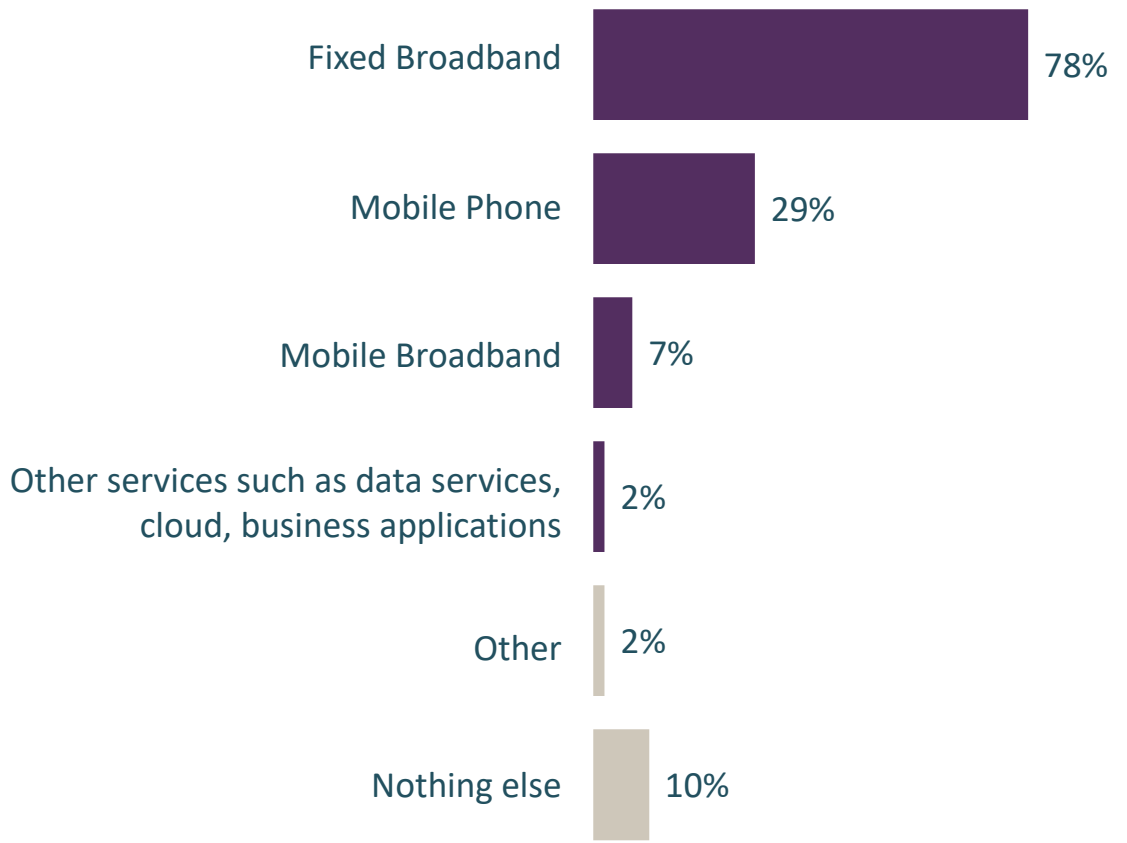
Q. Which fixed landline phone service provider were you previously with?

Previous Landline Provider



Q. Which, if any other telecommunication services did you purchase from [INSERT PROVIDER FROM Q47] at the time you had your fixed landline service with them?

Products With Previous Telecoms Provider

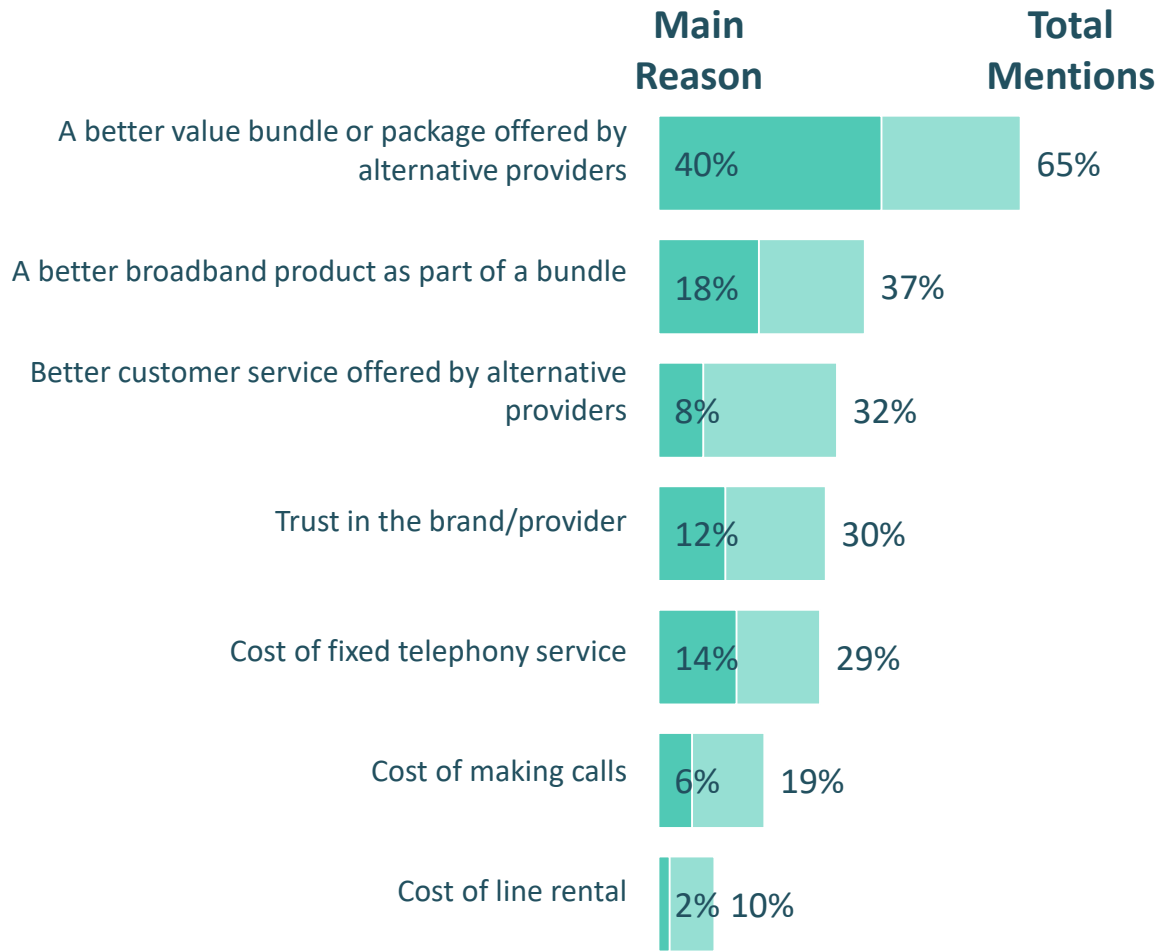


Among those businesses who report switching providers in the past 2 years, 2 in 5 were with Eir, and 1 in 3 were with Vodafone. In addition to fixed landline, fixed broadband is the most common product they purchased with their previous provider.

Reason for choosing current Fixed Landline Provider

(Base: All telecoms decision makers with fixed landline telephone, n=374)

Q. What was the main/other reason for choosing your current fixed landline service provider for your business?



Total Mentions		
Company size		
Micro (1-10) (n=238)	Small (11-50) (n=115)	Medium (50-249) (n=21*)
65%	67%	46%
38%	31%	24%
31%	38%	27%
31%	28%	29%
30%	21%	54%
18%	23%	18%
9%	13%	14%

Getting better value/package is by far the most important reason why businesses chose a particular provider. Just under 2 in 5 also mention getting a better broadband product as part of their bundle with a new provider as a reason for choosing that provider.

* Caution: Small Base

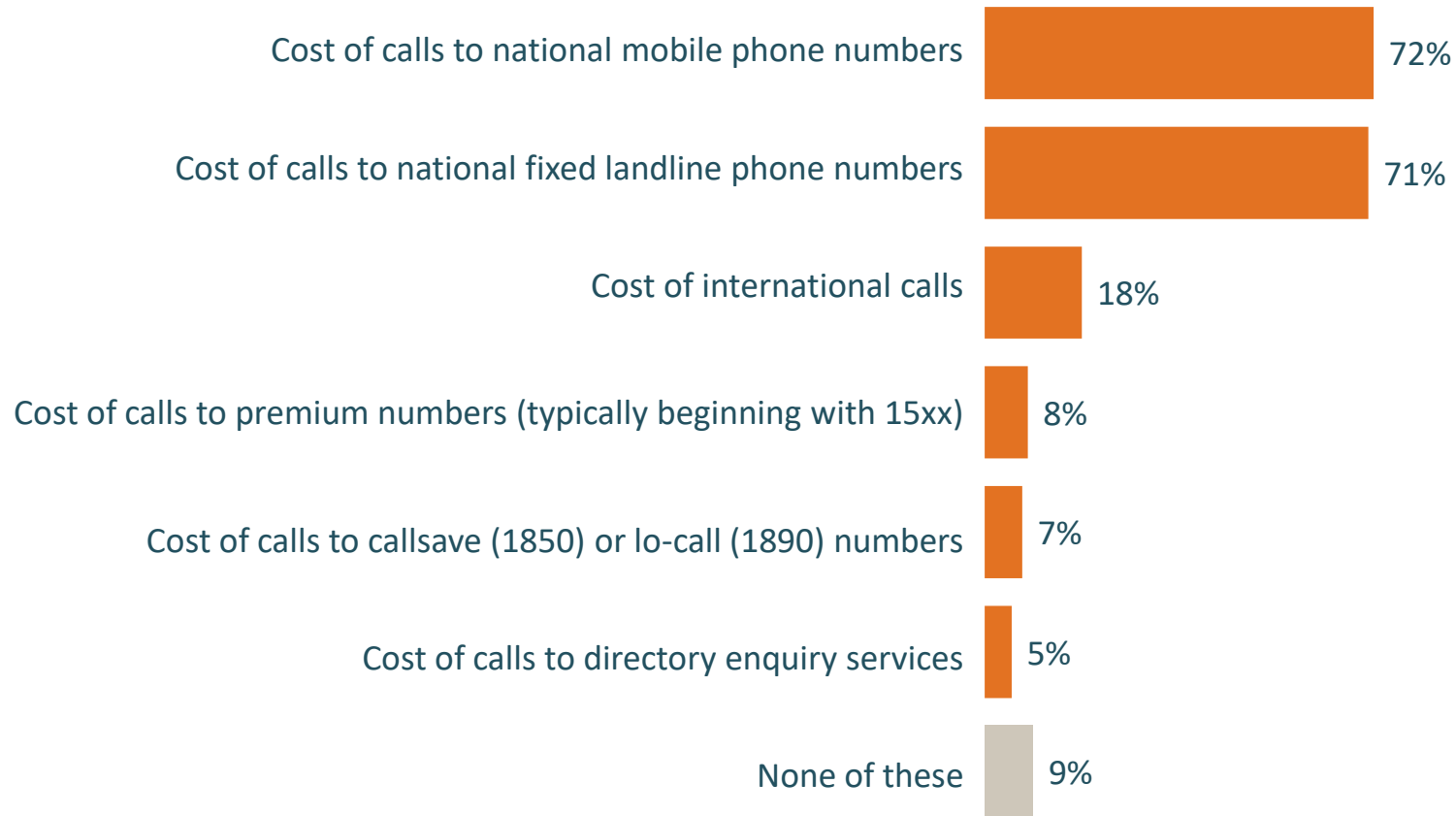
(Q.49a/b)



Importance of Call Costs when choosing a Provider

(Base: All stating cost of calls was important reason when choosing a provider, n=75)

Q. You mentioned that cost of making calls was an important reason for switching providers. Please select the type or types of call which were important from the following list.

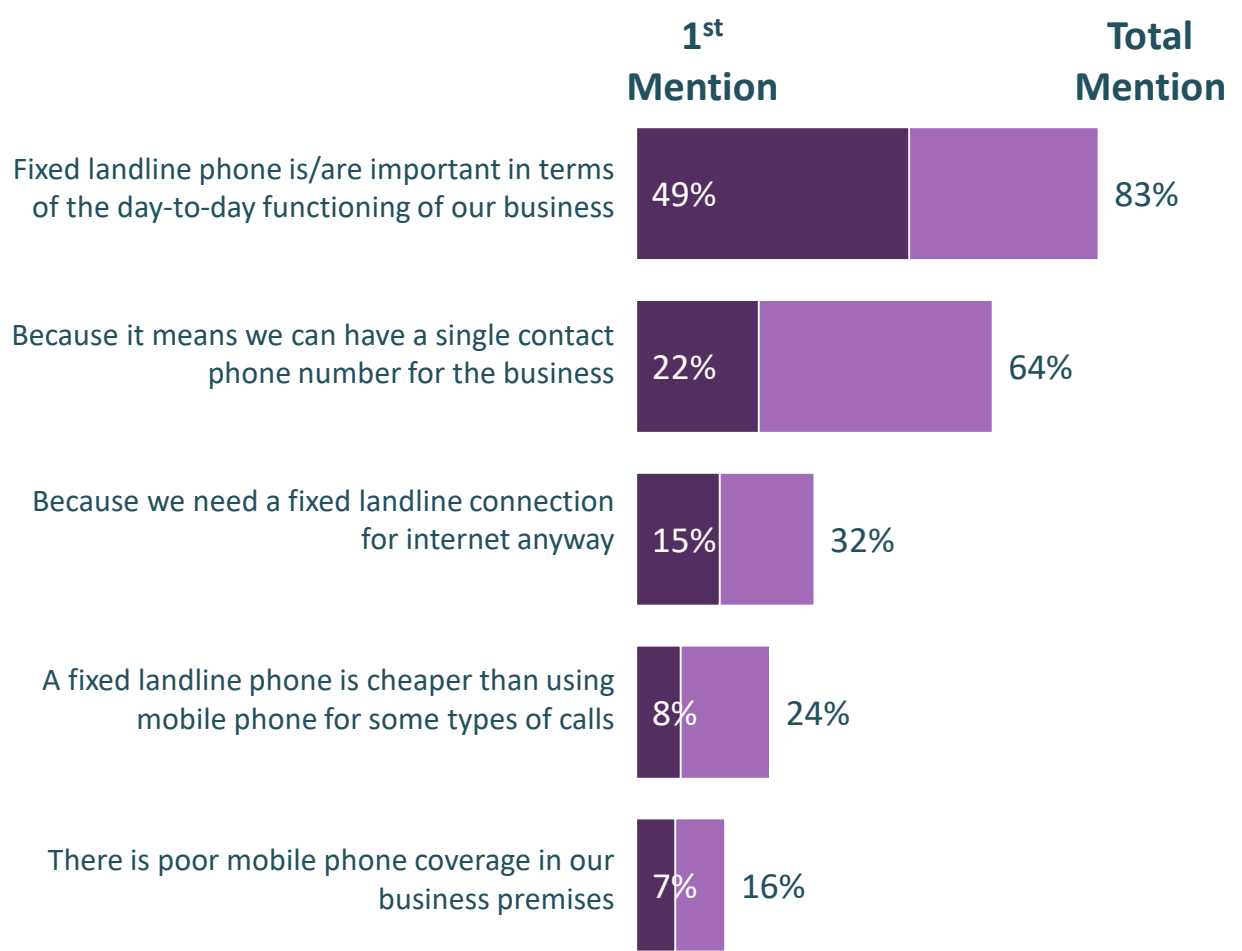


Cost of calls to national mobile and national fixed landline numbers are the main important factors, considered by just under 3 in 4 businesses when choosing a provider.

Reason For Maintaining Fixed Landline Service

(Base: All telecoms decision makers with fixed landline telephone, n=390)

Q. Which of the reasons are important in your decision to keep a fixed landline service in your business?



Total Mentions

Company size			No. of Sites	
Micro (1-10) (n=248)	Small (11-50) (n=117)	Medium (50-249) (n=25*)	Single (n=309)	Multi (n=79)
83%	79%	77%	82%	83%
62%	70%	70%	62%	70%
32%	32%	28%	31%	35%
24%	22%	35%	22%	32%
15%	23%	16%	14%	25%

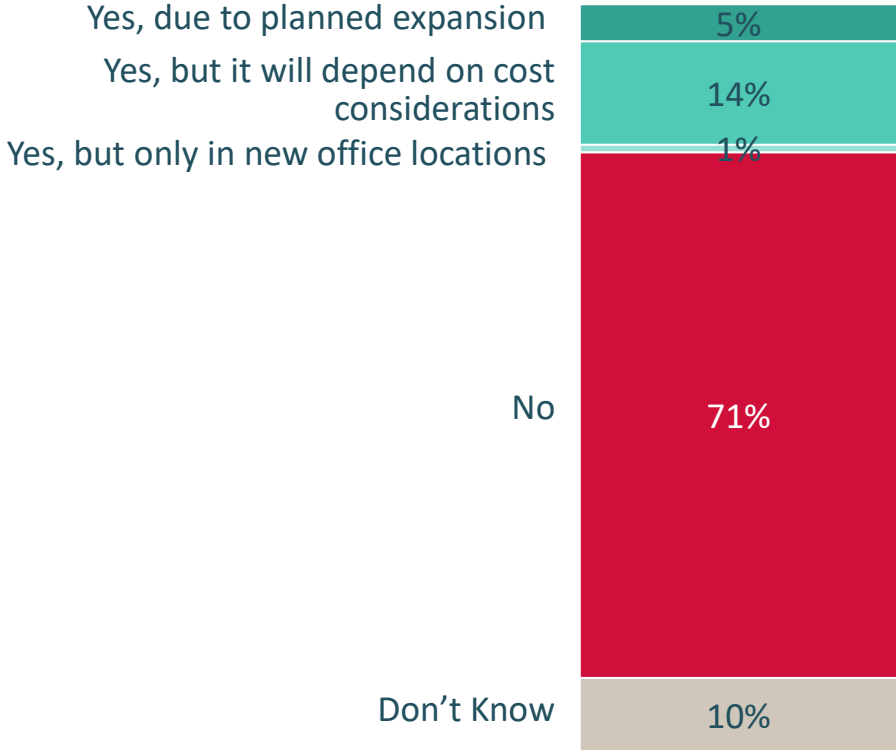
* Caution: Small Base

The main reason for maintaining a fixed landline service by businesses is that this service is important to the day to day functioning of their business. In addition, for 2 in 3, having a single contact phone number for their business is also important, more so for larger companies and those with multiple sites.

Plans to upgrade Company Telecommunications Services

(Base: All telecoms decision makers, n=357)

Q. Do you have plans to upgrade your company's telecommunications services (e.g. fixed landline phone, broadband and/or other services) over the next few years? For example, switching from PSTN/ISDN based fixed landline phones to VoIP (SIP trunking)?



Yes, due to planned expansion

Yes, but it will depend on cost considerations

Yes, but only in new office locations

No

Don't Know

Company size			Region			
Micro (1-10) (n=229)	Small (11-50) (n=108)	Medium (50-249) (n=20*)	Dublin (n=85)	ROL (n=90)	Munster (n=102)	Conn/ Ulster (n=80)
4%	5%	12%	2%	7%	1%	11%
13%	17%	20%	14%	14%	17%	10%
1%	1%	5%	2%	2%	0	1%
72%	69%	42%	74%	66%	71%	70%
10%	8%	21%	8%	11%	11%	8%

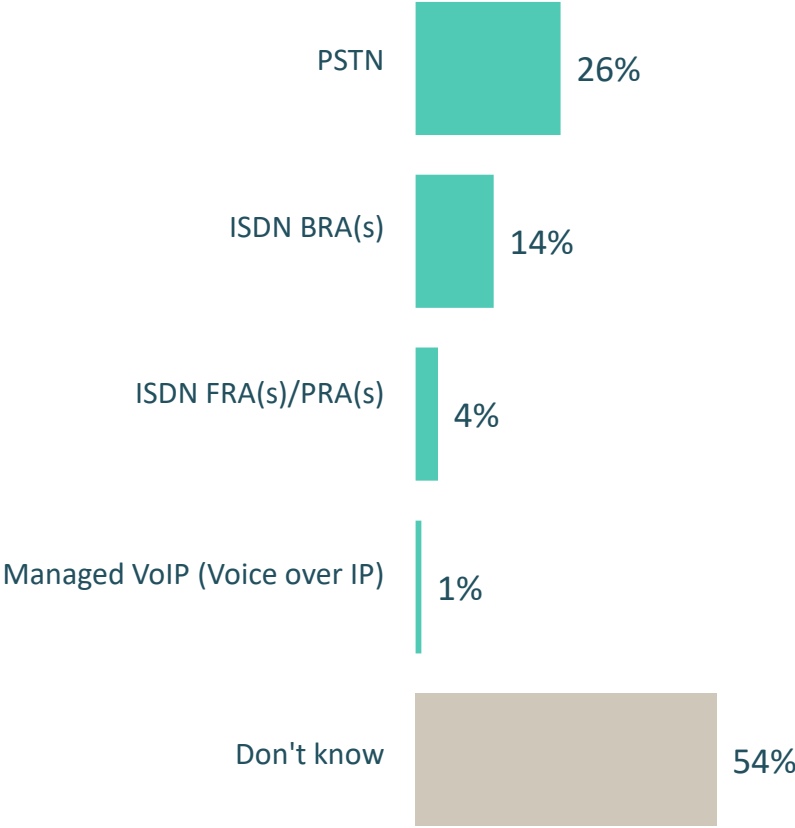
71% of businesses say they don't have any plans to upgrade their company's telecoms services. Medium sized businesses are more likely to report plans for upgrades.

* Caution: Small Base

Preference for Voice Telecommunication Services

(Base: All telecoms decision makers with fixed landline telephone, n=390)

Q. If you were thinking of changing your voice telecommunications services in your business, which of the following would you consider?



Company size		
Micro (1-10) (n=248)	Small (11-50) (n=117)	Medium (50-249) (n=25*)
27%	26%	13%
13%	16%	46%
4%	5%	11%
1%	2%	0
56%	52%	31%

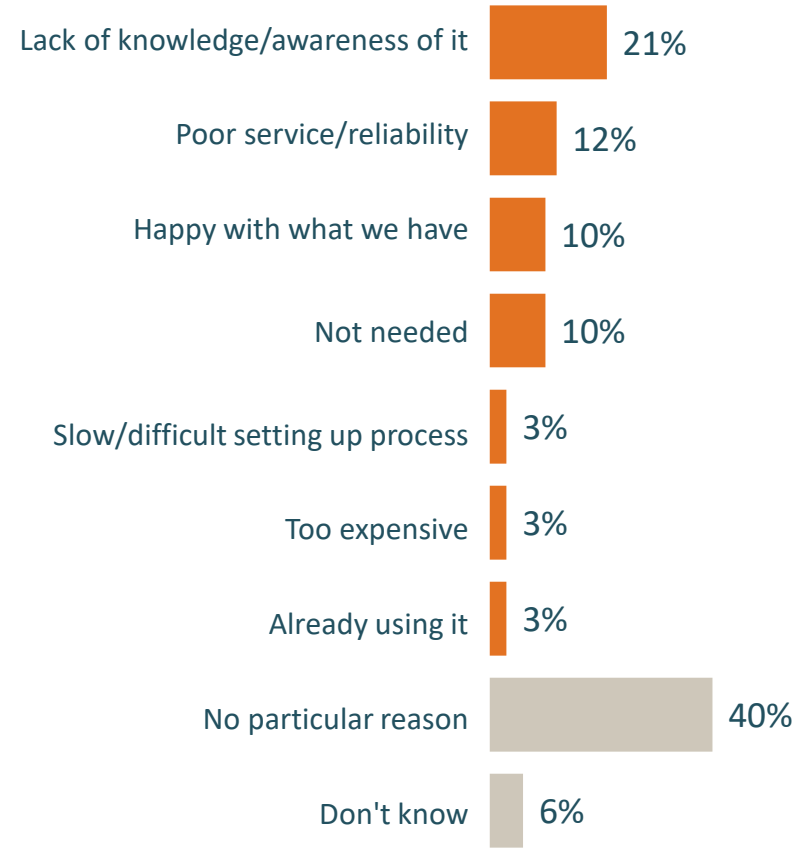
Region			
Dublin (n=101)	ROL (n=96)	Munster (n=110)	Conn/ Ulster (n=83)
27%	22%	27%	30%
19%	10%	13%	11%
3%	4%	5%	5%
2%	1%	1%	1%
49%	64%	53%	53%

While 1 in 4 prefer PSTN voice services, over half of businesses with fixed landline telephone say they don't know what their preference would be in relation to various voice services.

Reasons for not switching from Traditional Fixed Landline Phones to Managed VoIP etc.

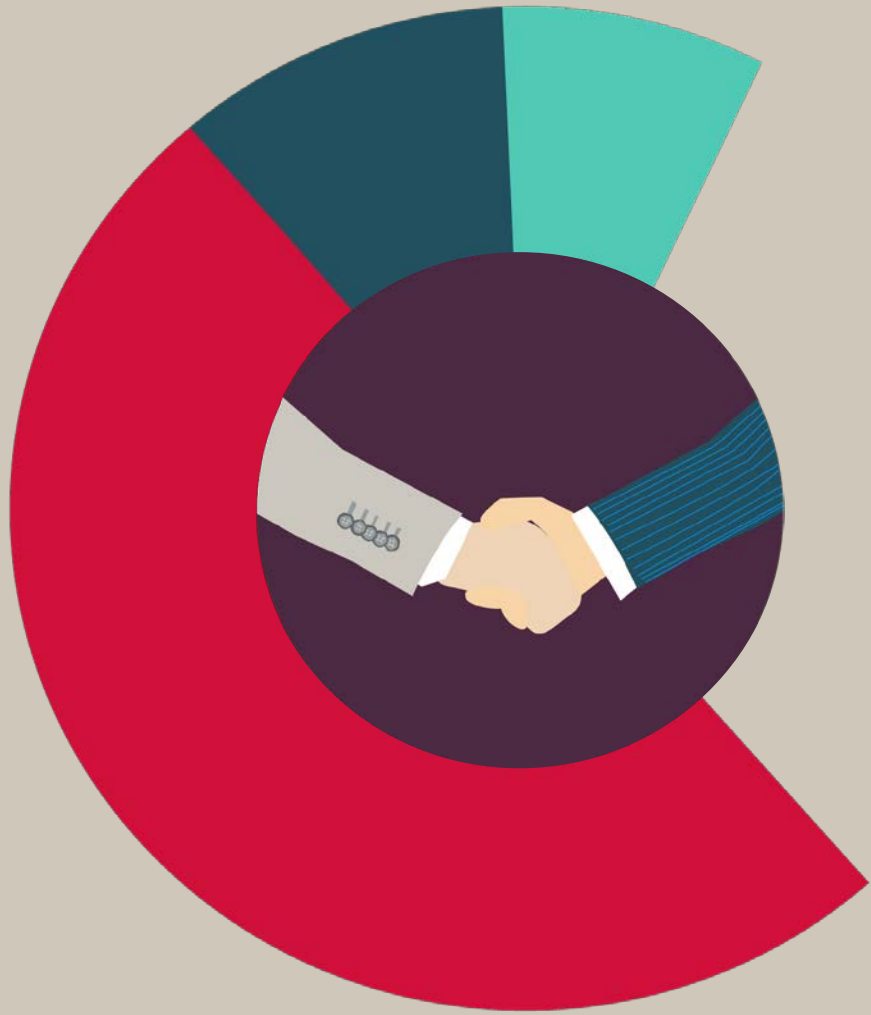
Q. Are there any reasons why your company, or other companies would not switch from PSTN/ISDN based fixed landline phones to VoIP, assuming access to high speed broadband is not an issue?

(Base: All active fixed line users, n=389)



	Company size			Region			
	Micro (1-10) (n=247)	Small (11-50) (n=117)	Medium (50-249) (n=25*)	Dublin (n=101)	ROL (n=96)	Munster (n=109)	Conn/ Ulster (n=83)
Lack of knowledge/awareness of it	22%	16%	8%	16%	22%	24%	21%
Poor service/reliability	13%	8%	26%	18%	9%	10%	10%
Happy with what we have	10%	8%	12%	10%	7%	9%	16%
Not needed	10%	12%	0	4%	10%	12%	14%
Slow/difficult setting up process	3%	3%	3%	7%	1%	2%	*
Too expensive	3%	5%	7%	5%	2%	1%	4%
Already using it	2%	4%	17%	4%	1%	4%	3%
No particular reason	39%	44%	22%	39%	47%	33%	42%
Don't know	6%	5%	16%	5%	6%	6%	5%

1 in 5 businesses report a lack of knowledge/awareness as the reason they haven't switched away from traditional fixed landline phones to VoIP services. Those based in Conn/Ulster are more likely to say this is due to the fact that they're happy with what they have and haven't felt the need to switch to VoIP.

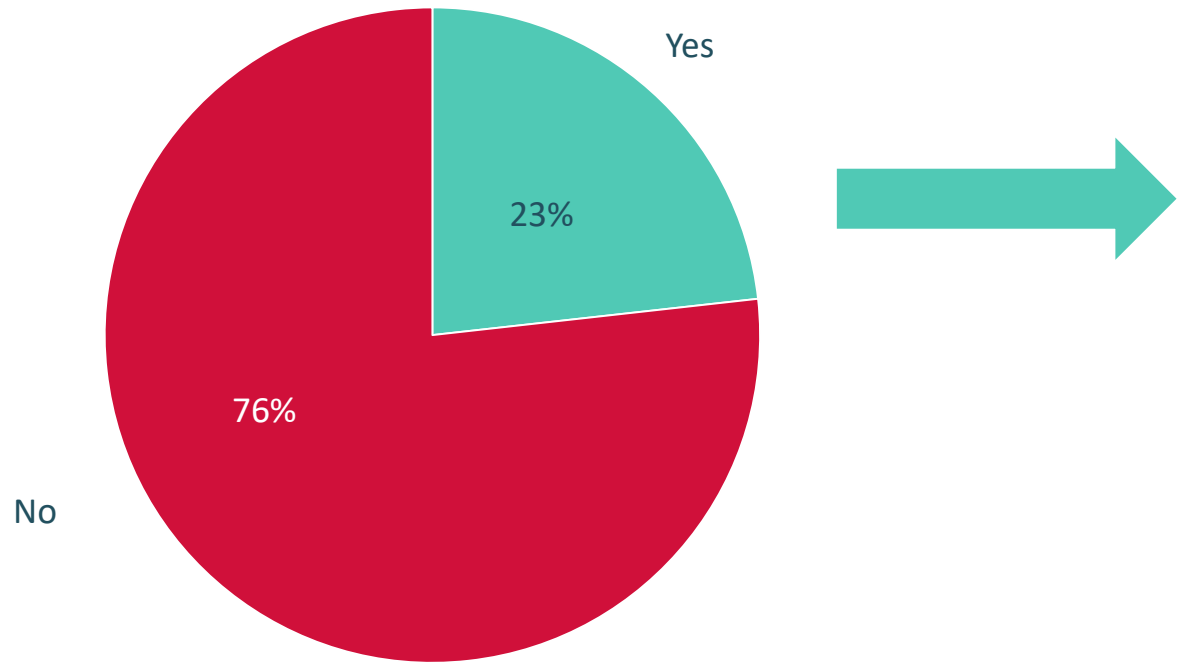


Reasons for not having a Fixed Landline Service

Incidence of having previously owned a Fixed Landline service

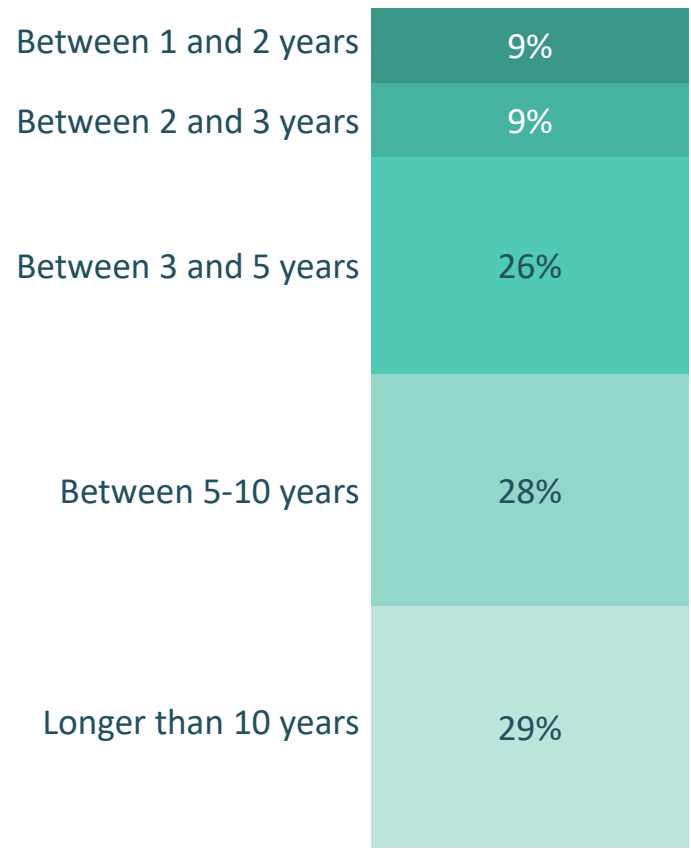
(Base: All Businesses Without Fixed Landline Telephone, n=110)

Q. Did you previously have a fixed landline phone in your business?



Q. How long ago did you stop having a fixed landline phone in your business premises?

When had fixed landline *(All who have previously owned a fixed landline, n=26*)*

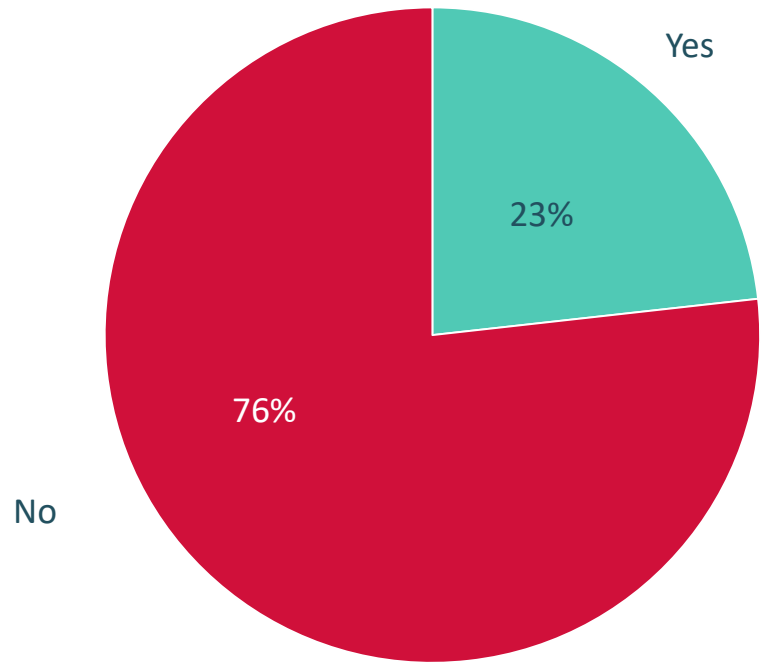


Just under 1 in 4 of the businesses who currently don't have a fixed landline, report having this service previously. For over 8 in 10, it has been more than 3 years since they last had this service.

Incidence of having previously had a Fixed Landline Telephone

(Base: All Businesses Without Fixed Landline Telephone, n=110)

Q. Did you previously have a fixed landline phone in your business?



	Company size		
	Micro (1-10) (n=100)	Small (11-50) (n=10)	Medium (50-249) (n=0)
Yes	23%	25%	-
No	76%	75%	-

	Region			
	Dublin (n=23*)	RoL (n=46*)	Munster (n=22*)	Conn/ Ulster (n=19*)
Yes	6%	32%	38%	15%
No	90%	68%	62%	85%

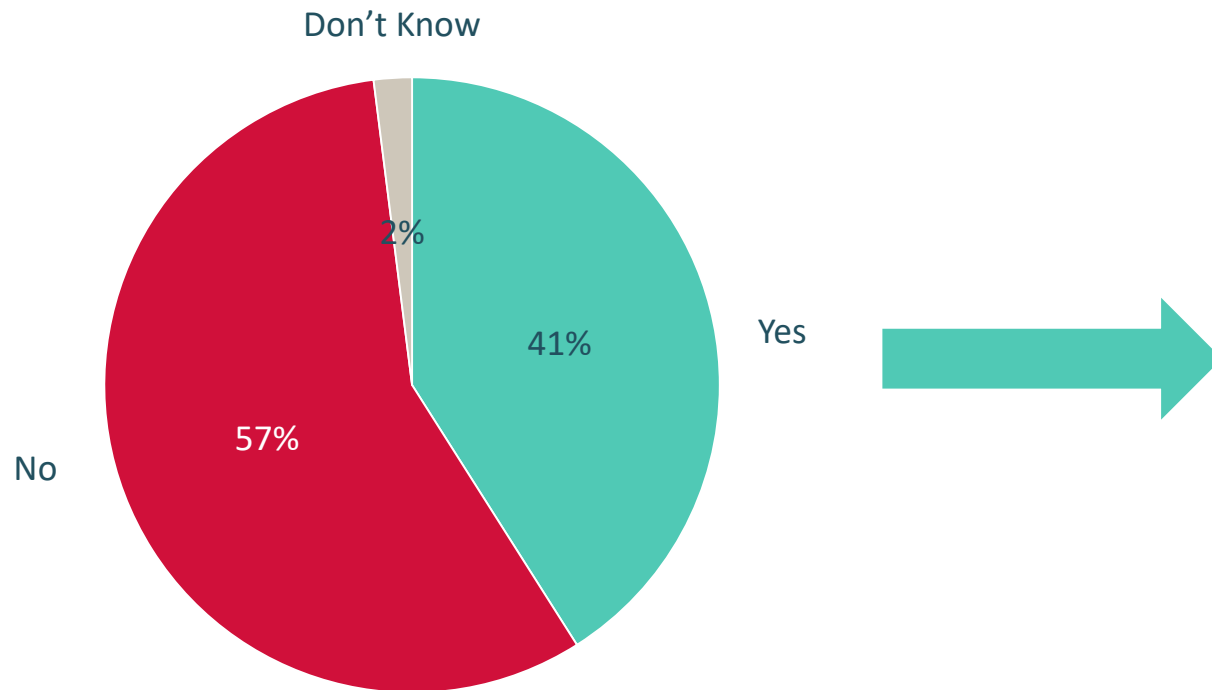
Just under 1 in 4 of the businesses who don't currently have a fixed landline, report having this service previously. Those businesses currently without a fixed landline, who are based in RoL and Munster, are more likely to have had a fixed landline service previously.

Fixed Landline previously owned

(Base: All businesses without fixed landline telephone that had it previously, n=26*)

Q. Did you previously have your fixed landline service as part of a bundle with other telecommunication services?

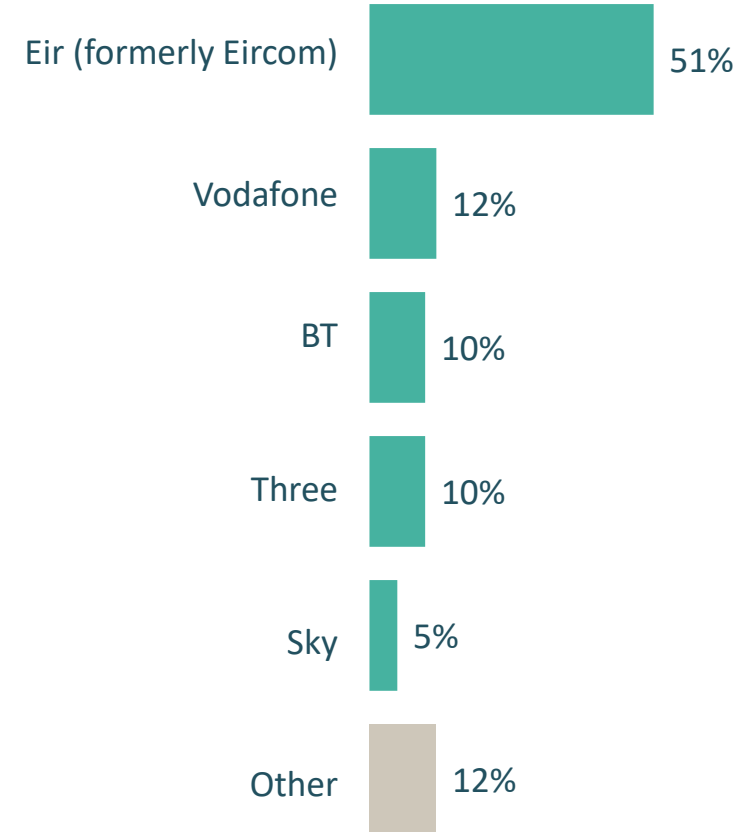
Was fixed landline part of a bundle?



Q. Who was your provider for this previous bundle of telecommunications services?

Previous Fixed Landline Bundle provider

(All who have previously owned a fixed landline as part of a bundle, n=15*)



* Caution: Extremely Small Base

Over 2 in 5 of those who previously had a fixed landline service, purchased this as part of a bundle. The majority of these were with Eir as their bundle provider.

REDC

(Q.59)

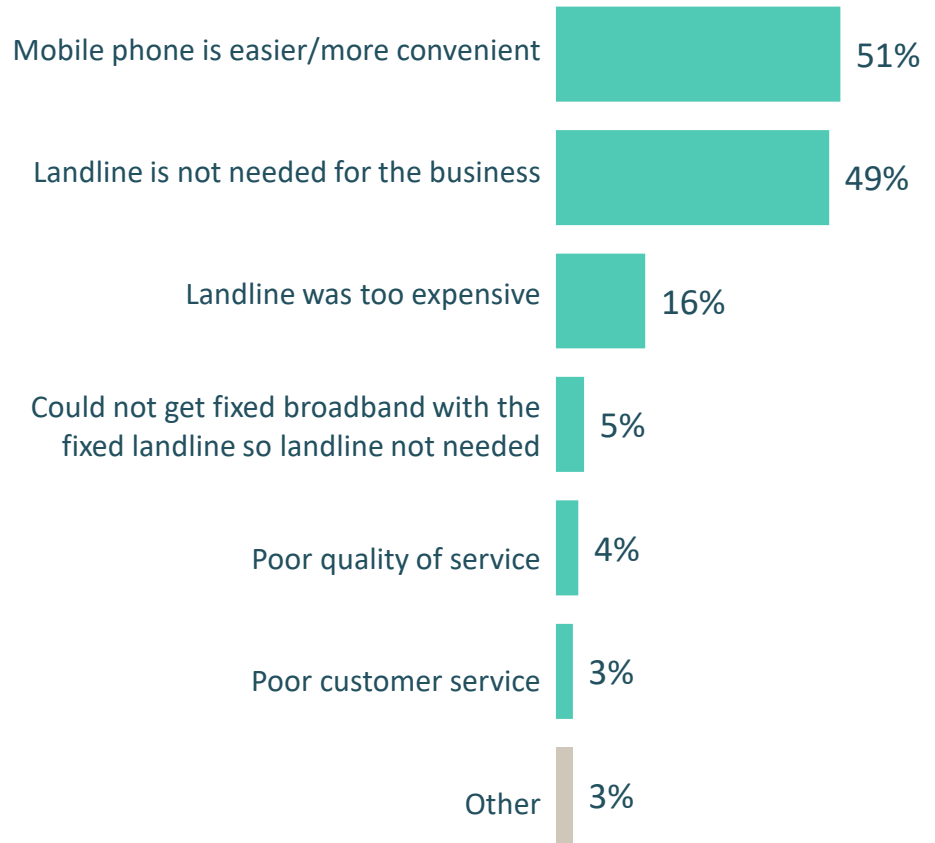
(Q.60)

70

Reasons for not having a Fixed Landline

(Base: All businesses without fixed landline telephone, n=110)

Q. Why does your business not have a fixed landline phone?



	Company size			Region			
	Micro (1-10) (n=100)	Small (11-50) (n=10*)	Medium (50-249) (n=0)	Dublin (n=23*)	ROL (n=46*)	Munster (n=22*)	Conn/ Ulster (n=19*)
Mobile phone is easier/more convenient	51%	54%	-	82%	38%	46%	28%
Landline is not needed for the business	50%	45%	-	43%	51%	56%	50%
Landline was too expensive	16%	10%	-	4%	21%	23%	15%
Could not get fixed broadband with the fixed landline so landline not needed	6%	0	-	0%	11%	8%	0%
Poor quality of service	4%	0	-	0%	5%	5%	10%
Poor customer service	3%	0	-	0%	3%	8%	3%
Other	2%	17%	-	0%	4%	6%	2%

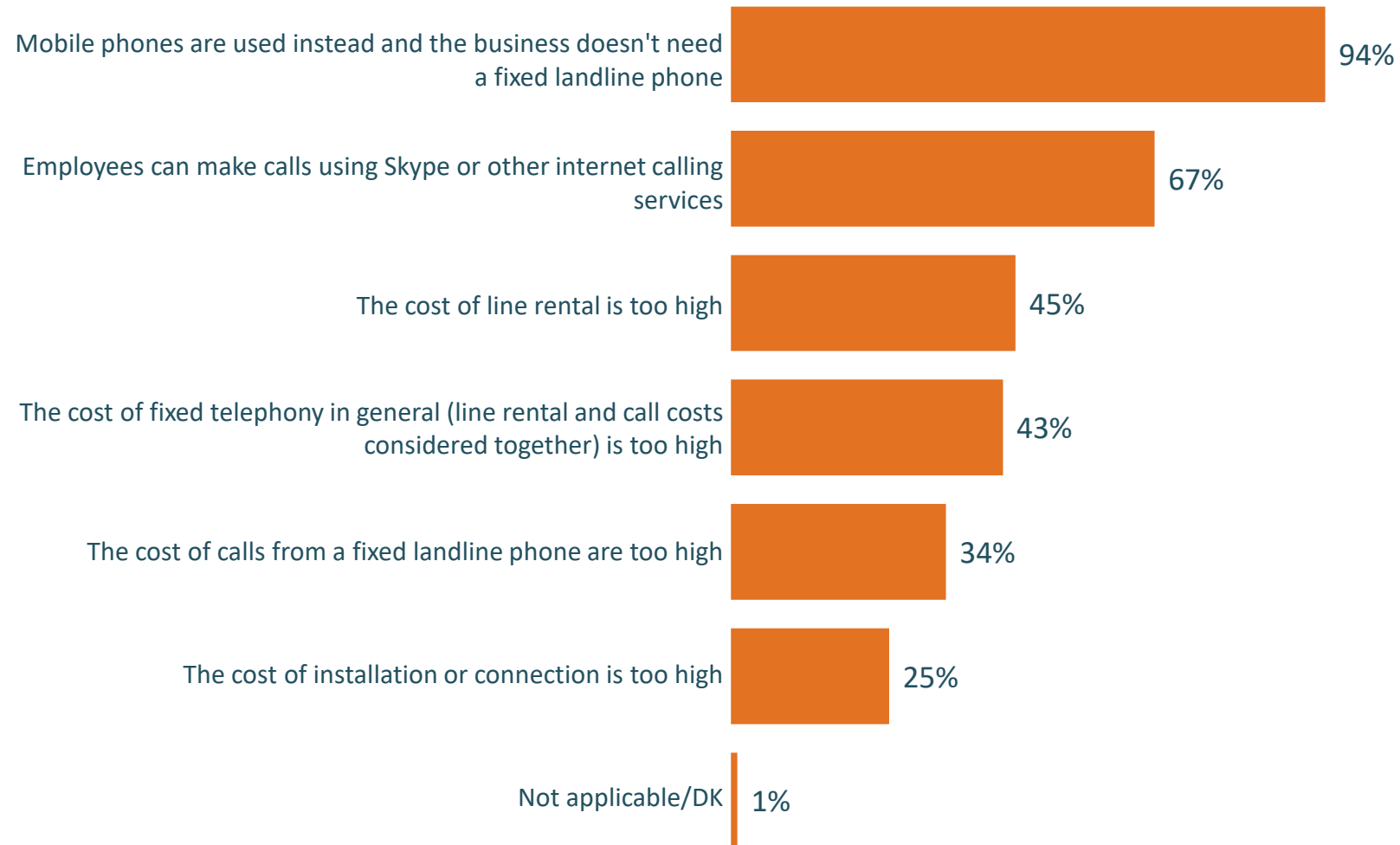
* Caution: Small Base

Half of businesses without a fixed landline say mobile phones are easier/more convenient and that landline is not needed for their business. 1 in 6 also report the expense associated with landlines as the reason they forgo having one.

Q. How relevant was each of the below to your business' decision to not have a fixed landline phone service.

Decision not to have Fixed Landline Phone Service

(Base: All telecoms decision makers without fixed landline telephone, n=110)



Over 9 in 10 of businesses without fixed landline say they don't need fixed landlines and mobile phones are used instead. In addition, 2 in 3 say their employees can make calls using Skype or other internet calling services, while approx. 2 in 5 say the cost of line rental and the cost of fixed telephony in general are too high.

Spend on Telecommunications: approx.

(Base: All telecoms decision makers, n=501)

* Caution: Small Base

Q. Approximately how much is the total annual business spend on telecommunications services for the part of the business over which you are responsible for selecting providers?

Less than €500	7%
Between €500-€750	13%
Between €750-€1000	9%
Between €1,000-€1,500	18%
Between €1,500-€2,000	10%
Between €2,000-€2,500	6%
Up to €3,000	9%
Up to €4,000	3%
Up to €5,000	5%
Up to €10,000	7%
Up to €20,000	4%
€20,000+	3%
Don't know	7%
Average Spend	€3,366.60

	Company size			Region			
	Micro (1-10) (n=349)	Small (11-50) (n=127)	Medium (50-249) (n=25*)	Dublin (n=124)	ROL (n=142)	Munster (n=132)	Conn/ Ulster (n=103)
Less than €500	7%	3%	3%	4%	11%	6%	6%
Between €500-€750	15%	5%	0%	13%	15%	11%	13%
Between €750-€1000	10%	1%	0%	8%	8%	8%	12%
Between €1,000-€1,500	19%	15%	0%	16%	19%	20%	18%
Between €1,500-€2,000	10%	8%	0%	7%	12%	10%	9%
Between €2,000-€2,500	6%	9%	0%	6%	7%	4%	8%
Up to €3,000	8%	10%	3%	5%	10%	12%	7%
Up to €4,000	2%	6%	4%	4%	2%	4%	0%
Up to €5,000	5%	6%	0%	5%	4%	7%	6%
Up to €10,000	7%	12%	0%	9%	6%	7%	5%
Up to €20,000	3%	8%	17%	5%	3%	3%	4%
€20,000+	1%	6%	37%	7%	*	1%	2%
Don't know	6%	11%	32%	11%	4%	6%	8%
Average Spend	€ 2,715.77	€5,876.38	€18,709.27	€ 5,044.00	€2,214.56	€3,054.69	€2,787.72



SSNIP

SSNIP Questions

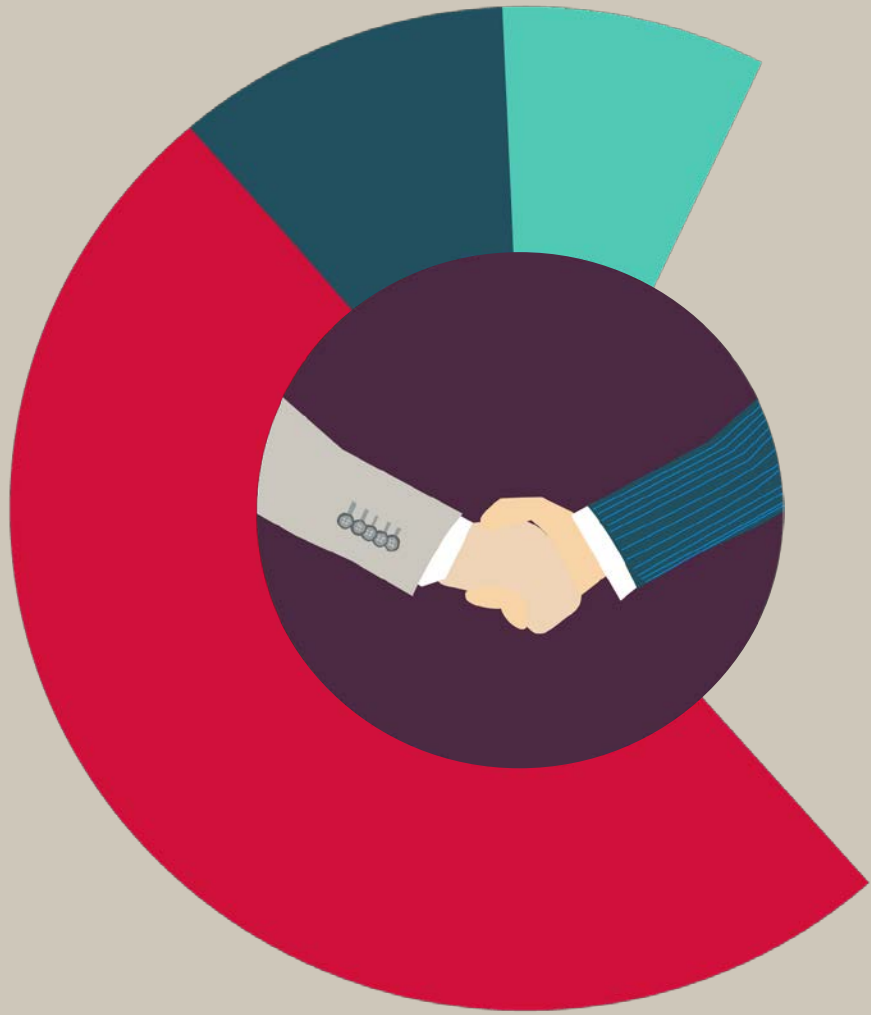
- / Small but Significant Non-Transitory Increase in Price ('SSNIP')
- / SSNIP questions were included as part of this survey in order to evaluate the impact of potential changes in costs of the business' phone service on decision makers' behaviour in terms of their telecommunications services selection.
- / However, given the small base sizes qualifying for each scenario, the results would not be reliable and have not been shown in the report.

- / Four SSNIP scenarios defined as follows:
 - » SSNIP1 – €2 per month increase in the cost of line rental. Asked of those with fixed landline service, who access voice service through PSTN or ISDN and purchase their calls and line rental from separate providers (n=27)

 - » SSNIP2 – €2 per month increase in the cost of fixed landline calls. Asked of those with fixed landline service, who access voice services through PSTN or ISDN, and purchase their calls and line rental from separate providers (n=27)

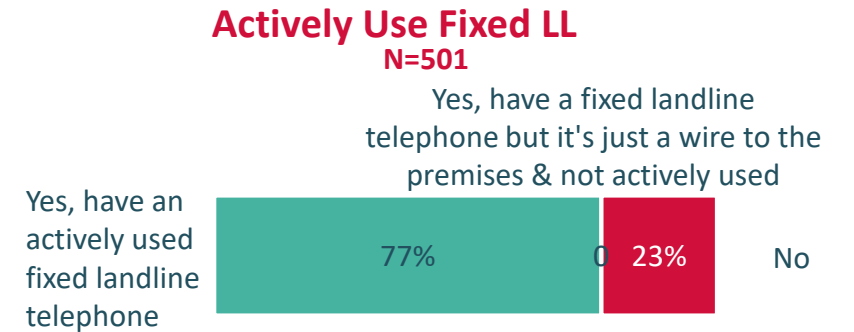
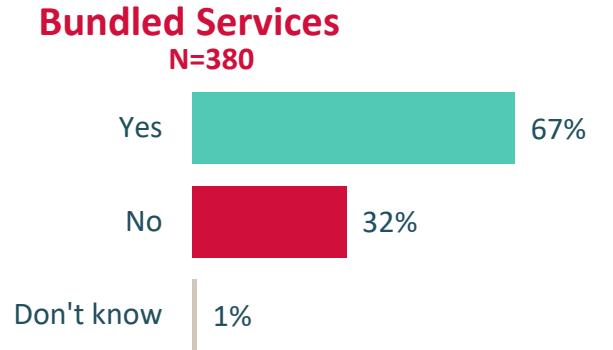
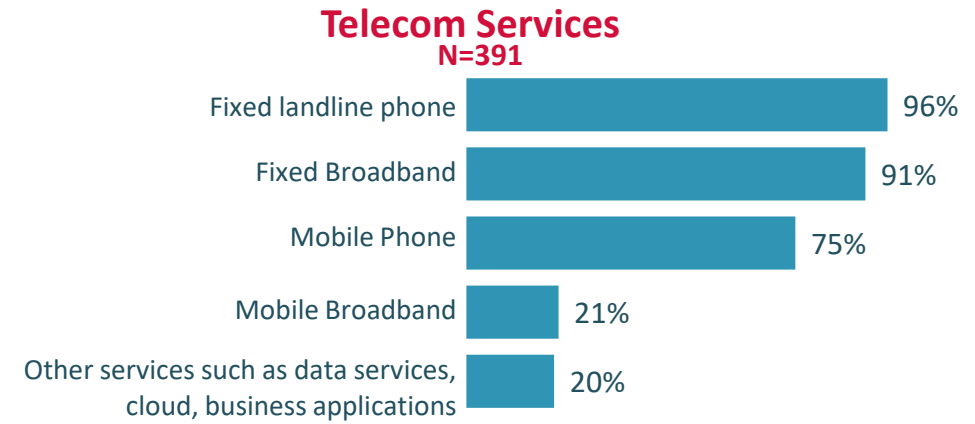
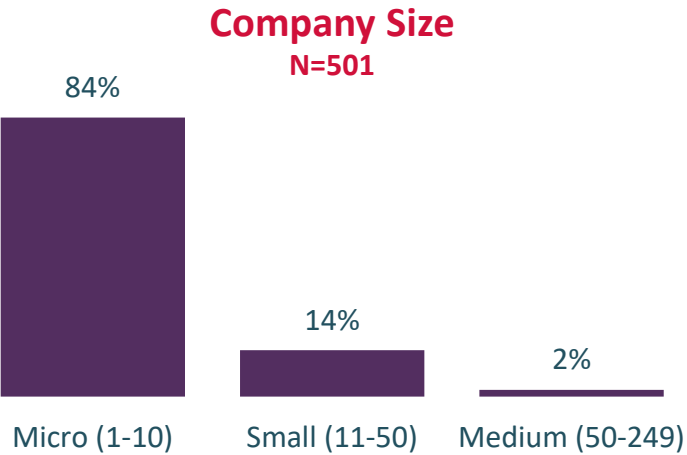
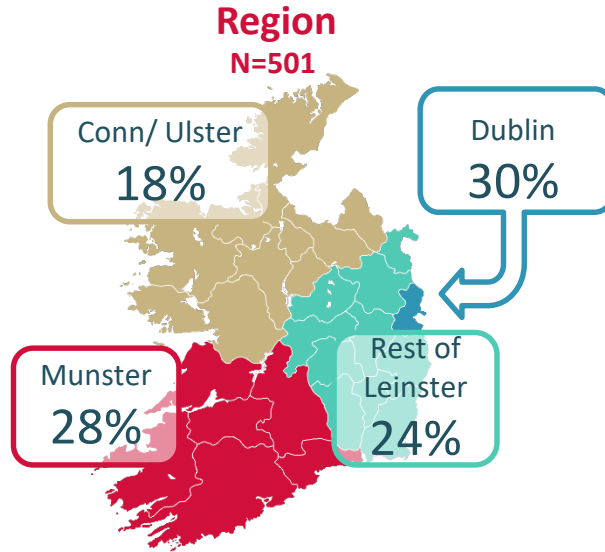
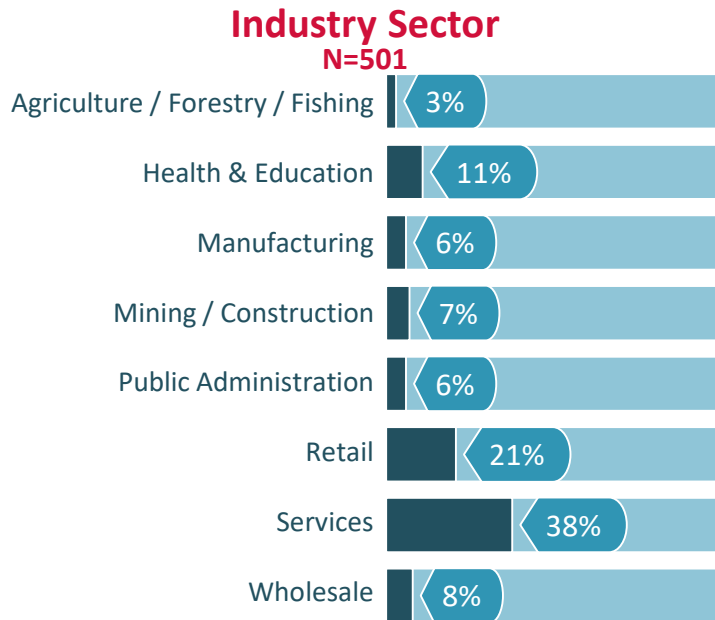
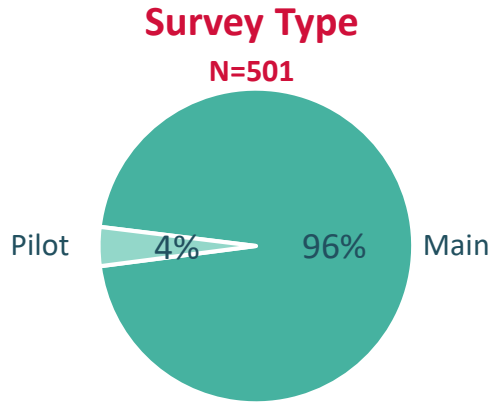
 - » SSNIP3 - €4 per month increase to the total cost of the bill. Asked of those with fixed landline service, who access voice services through PSTN or ISDN, and purchase their calls and line rental from the same provider, and purchase their telecommunication services as part of a bundle (n=4)

 - » SSNIP4 - €2/€10 per month increase in the cost of the fixed phone component of the bundle. Asked of those with fixed landline service, who access voice through PSTN or ISDN, and purchase their calls and line rental from the same provider, and do not purchase their telecommunication services as part of a bundle (n=0)



Analysis of Sample

Analysis of Sample



Analysis of Sample

(Base: All Telecoms Decision Makers, n=501)

		Total	Company Size			Region			
			Micro (1-10)	Small (11-50)	Medium (50-249)	Dublin	ROL	Munster	Conn/Ulster
SURVEY TYPE	Main	96%	96%	96%	96%	98%	94%	95%	95%
	Pilot	4%	4%	4%	4%	2%	6%	5%	5%
INDUSTRY SECTOR	Agriculture / Forestry / Fishing	3%	3%	1%	0%	3%	4%	2%	3%
	Health & Education	11%	12%	8%	7%	16%	9%	9%	8%
	Manufacturing	6%	5%	7%	31%	6%	5%	5%	7%
	Mining / Construction	7%	7%	7%	4%	8%	10%	3%	8%
	Public Administration	6%	7%	2%	0%	8%	3%	5%	7%
	Retail	21%	19%	35%	15%	15%	28%	25%	17%
	Services	38%	39%	33%	31%	31%	33%	45%	46%
	Wholesale	8%	8%	7%	12%	13%	8%	5%	4%
REGION	Dublin	30%	28%	34%	65%	-	-	-	-
	Rest of Leinster	24%	24%	28%	3%	-	-	-	-
	Munster	28%	30%	20%	18%	-	-	-	-
	Conn/Ulster	18%	18%	18%	14%	-	-	-	-
COMPANY SIZE	Micro (1-10)	84%	-	-	-	80%	84%	89%	84%
	Small (11-50)	14%	-	-	-	16%	16%	10%	14%
	Medium (50-249)	2%	-	-	-	4%	*	1%	2%
ACTIVELY USED FIXED LL	Yes, have an actively used fixed landline telephone	77%	74%	93%	100%	78%	68%	83%	79%
	Yes, have a fixed landline telephone but it's just a wire to the premises & is not actively used	*	*	0%	0%	0%	0%	0%	1%
	No	23%	26%	7%	0%	22%	32%	17%	20%
TELECOM SERVICES	Fixed landline phone	74%	71%	91%	85%	73%	65%	80%	77%
	Fixed Broadband	70%	67%	87%	92%	73%	62%	75%	71%
	Mobile Phone	58%	56%	65%	89%	55%	48%	66%	61%
	Mobile Broadband	16%	14%	20%	74%	17%	10%	17%	20%
	Other services such as data services, cloud, business applications	17%	15%	22%	60%	20%	9%	18%	18%
BUNDLED SERVICES	Yes	50%	48%	62%	58%	49%	46%	53%	51%
	No	24%	23%	29%	34%	26%	17%	24%	28%
	Don't know	1%	1%	1%	8%	2%	1%	2%	0%



Summary of Key Findings

Summary of Key Findings – I

Background to the Business

Majority of businesses have 1 location in Republic of Ireland. Over 1 in 4 operate from an office building, while a similar proportion work from a home office. Over 3 in 4 businesses surveyed reported having an actively used fixed landline telephone service, with 40% of these having more than one active fixed landline service.

Services Purchased

Over 9 in 10 businesses (96%) purchase fixed landline. 84% use a traditional phone line (PSTN), 15% use ISDN, and 6% use managed VoIP as their means of accessing voice services. 91% report purchasing fixed broadband which is mainly accessed through the fibre network (47%) and traditional phone line (44%). 59% of the businesses with ISDN have multiple ISDN connections. Over half of these (54%) report their main ISDN connection is a basic rate access (BRA) connection.

Service Provider

Eir and Vodafone are the top two providers in relation to fixed landline (Eir 49%, Vodafone 28%) and broadband (Eir 47%, Vodafone 26%). Vodafone dominates as the main mobile phone provider (48%), followed by Three (29%). When it comes to mobile broadband, 47% use Vodafone while 25% are with Eir.

Bundles

2 in 3 businesses report bundling their telecommunications products together. For the majority (over 9 in 10) these bundles include fixed landline telephone and fixed broadband service. Just under half report bundling services because it's easier to manage one provider (49%), a third state they can negotiate better discounts (33%), and 29% say they can get a better services in a bundle. Those businesses who choose not to bundle their products say this is because they tend to go with the best available price at the time (37%).

Phone Usage

1 in 10 businesses use PBX to manage/aggregate calls. Of these, over half say the PBX service is not IP based, with only 30% using an IP based PBX service. 60% of businesses provide 50% or more of their employees with a landline service, while only 23% of businesses report providing a mobile phone service to 50% or more of their employees.

Summary of Key Findings – II

Business Phone: Bundles & Price

88% of businesses purchase line rental and calls from the same provider. 1 in 5 pay less than €50 for their fixed landline service (calls and line rental), while a similar proportion pay between €50-100. 68% of businesses have a business contract/package with standard tariffs. 90% receive monthly bills and 67% say they themselves or someone else in the business checks the details of these bills in relation to the total amount (93%) and whether or not the amount is greater than the bundle price (86%).

Phone Usage, Patterns & Awareness

Fixed landline is preferred as the main method for making calls, followed by mobile phones. Fixed landlines are more likely to be used when making calls to national or international numbers, while mobile phones are preferred when calling other mobile phones.

Switching & Sticking

While 70% of businesses report reviewing their service arrangements with their telecoms provider in the past 3 years, 2 in 5 say it has been 3+ years since they last switched providers, with 60% reporting to have been with their current fixed landline provider for over 3 years. Getting a better value bundle or package (65%) is the main reason for businesses to choose a fixed landline provider. 71% of businesses say they don't have any plans to upgrade their company's telecoms services. Lack of awareness (21%) and poor service/reliability (12%) are the main reasons given by businesses for not switching from traditional fixed landline to VoIP, with an additional 40% not able to cite any particular reason for not doing so.

Reasons for Not Having a Fixed Landline Telephone Service

23% of those currently without a fixed landline service report having this service previously. Over 2 in 5 of these (41%) used to purchase this service as part of a bundle. The ease and convenience of mobile phones (51%), as well as landlines no longer being needed by the business (49%), are the main reasons cited by businesses for giving up their fixed landline service.

**THANK
YOU**

REDC