

## **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

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Base : Those who use IP-based alternatives and do not mostly use an ISDN service

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Table 1

S3A. Which of the following best describes your personal involvement with purchasing decisions regarding your organisation's telecoms and other communications services?

Base : All respondents

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION										IP SWITCHED		IP NOT SWITCHED		ANY IP
	Total	UNDER			ISDN2	OVER			ISDN30		ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN	ISDN					
		1-49	50-249	250+		£1M	£1M-£20M	£21M-£100M	£100M	i									j	k	l	m	
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q	r	s			
Unweighted total	350	72	84	192	53	109	95	83	165	161	89	85	76	100	91	85	118	67	16	218			
Effective Weighted Sample	289	61	83	178	42	92	86	76	115	157	54	82	75	97	75	84	102	58	14	197			
Total	350	106	101	142	69	118	83	67	156	142	92	77	64	116	74	74	100	61	13	216			
		30%	29%	41%	20%	34%	24%	19%	45%	40%	26%	22%	18%	33%	21%	21%	28%	17%	4%	62%			
Solely responsible	260	65	83	112	44	85	71	54	126	117	67	59	59	76	64	66	84	56	10	160			
	74%	61%	82%	79%	64%	72%	86%	80%	81%	83%	73%	76%	91%	66%	86%	89%	84%	92%	77%	74%			
		a	a	a			de		m	m			hjkms		ms	jkms	ms	jkms					
		25%	32%	43%	17%	33%	27%	21%	48%	45%	26%	22%	23%	29%	24%	25%	32%	21%	4%	61%			
Jointly responsible with somebody else	89	41	18	30	25	33	12	13	30	24	25	19	6	40	11	8	16	5	3	56			
	26%	39%	18%	21%	36%	28%	14%	20%	19%	17%	27%	24%	9%	34%	14%	11%	16%	8%	23%	26%			
		bc			f	f			l		loq	loq		hiInopq						Inopq			
		46%	20%	34%	28%	37%	13%	15%	34%	27%	28%	21%	6%	45%	12%	9%	18%	6%	3%	63%			
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																							

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Table 1

S3A. Which of the following best describes your personal involvement with purchasing decisions regarding your organisation's telecoms and other communications services?

Base : All respondents

		MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
Significance Level: 95%	Total	a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q
Unweighted total	350	123	94	133	88	53	83	54	154	64	160	57	140	20	150	200	139	193
Effective Weighted Sample	289	83	91	125	60	37	80	53	141	57	127	39	115	14	127	162	110	176
Total	350	124	85	141	82	57	73	49	158	58	153	56	130	22	160	190	162	171
		35%	24%	40%	24%	16%	21%	14%	45%	17%	44%	16%	37%	6%	46%	54%	46%	49%
Solely responsible	260	98	69	93	68	46	61	43	115	45	130	37	113	17	127	133	111	140
	74%	80%	81%	66%	82%	80%	84%	88%	73%	78%	85%	67%	86%	78%	80%	70%	68%	82%
		c	c					h			k						p	
		38%	26%	36%	26%	17%	23%	16%	44%	17%	50%	14%	43%	7%	49%	51%	42%	54%
Jointly responsible with somebody else	89	25	16	48	15	11	12	6	43	13	23	19	18	5	32	57	52	30
	26%	20%	19%	34%	18%	20%	16%	12%	27%	22%	15%	33%	14%	22%	20%	30%	32%	18%
			ab					g			j						q	
		28%	18%	54%	17%	13%	13%	7%	48%	15%	25%	21%	20%	6%	36%	64%	58%	34%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q



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Table 1

S3A. Which of the following best describes your personal involvement with purchasing decisions regarding your organisation's telecoms and other communications services?

Base : All respondents

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
								UP TO 3 YEARS	4+ YEARS						UP TO 2 YEARS	OVER 2 YEARS			
	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	YES	NO/DK					
	Total	a	b	c	d	e	f	g	h	i	j	*k	l	m	n	o	p	q	r
Significance Level: 95%																			
Unweighted total	350	34	128	55	138	55	99	33	156	51	110	22	88	155	92	82	127	156	62
Effective Weighted Sample	289	25	107	37	107	39	72	25	121	41	81	15	77	143	85	74	116	140	57
Total	350	33	119	57	131	53	95	39	151	45	111	22	84	151	85	88	121	153	63
		9%	34%	16%	38%	15%	27%	11%	43%	13%	32%	6%	24%	43%	24%	25%	35%	44%	18%
Solely responsible	260	32	101	35	115	35	68	32	127	36	88	13	63	115	77	63	93	118	43
	74%	98%	85%	61%	87%	66%	72%	82%	84%	81%	79%	57%	75%	76%	91%	71%	77%	77%	67%
		c	c	e										lm					
		12%	39%	13%	44%	13%	26%	12%	49%	14%	34%	5%	24%	44%	30%	24%	36%	45%	16%
Jointly responsible with somebody else	89	1	18	22	17	18	27	7	24	8	24	10	21	36	8	25	28	35	21
	26%	2%	15%	39%	13%	34%	28%	18%	16%	19%	21%	43%	25%	24%	9%	29%	23%	23%	33%
			ab	d									n	n					
		1%	21%	25%	19%	20%	30%	8%	27%	10%	27%	11%	24%	41%	9%	28%	31%	39%	23%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 2

S5. Which of these best describes the sector your business operates in? (SINGLE CODE)

Base : All respondents

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											IP SWITCHED		IP NOT SWITCHED		ANY IP
	Total	UNDER			£1M-£20M	£21M-£100M			ISDN2	ISDN30			BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN	ISDN						
		1-49	50-249	250+		£1M	£1M-£20M	£21M-£100M		£100M	ISDN2 ONLY	ONLY							ONLY					
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q	r	s				
Unweighted total	350	72	84	192	53	109	95	83	165	161	89	85	76	100	91	85	118	67	16	218				
Effective Weighted Sample	289	61	83	178	42	92	86	76	115	157	54	82	75	97	75	84	102	58	14	197				
Total	350	106 30%	101 29%	142 41%	69 20%	118 34%	83 24%	67 19%	156 45%	142 40%	92 26%	77 22%	64 18%	116 33%	74 21%	74 21%	100 28%	61 17%	13 4%	216 62%				
Primary (Extraction, mining, agriculture, forestry etc.)	16 5%	3 3%	6 6%	7 5%	1 2%	7 6%	5 6%	3 5%	9 6%	10 7%	5 5%	6 8%	4 7%	1 1%	5 6%	4 6%	6 6%	4 7%	1 6%	7 3%				
Manufacturing			20%	38%	42%	8%	42%	31%	19%	54%	m 64%	28%	m 38%	26%	8%	30%	26%	34%	25%	5%	42%			
	59 17%	6 6%	31 30%	22 16%	7 10%	17 14%	25 30%	10 15%	26 17%	29 20%	12 13%	14 18%	14 22%	19 16%	14 19%	19 26%	21 21%	17 29%	2 12%	40 18%				
			10%	52%	38%	12%	29%	deg 43%	17%	44%	48%	20%	24%	24%	32%	24%	32%	36%	j 29%	3%	68%			
Construction	38 11%	16 15%	9 9%	13 9%	11 16%	17 14%	4 5%	2 4%	14 9%	13 9%	10 11%	10 13%	3 5%	14 12%	3 4%	5 7%	6 6%	4 6%	*	20 9%				
Wholesale/Transport/Communications			42%	24%	34%	fg 30%	fg 44%	11%	6%	37%	36%	28%	n 26%	9%	37%	8%	14%	15%	10%	1%	52%			
	36 10%	6 6%	12 12%	18 13%	6 9%	14 12%	9 11%	7 10%	17 11%	18 13%	8 8%	9 11%	9 14%	10 9%	7 9%	9 12%	10 10%	7 11%	2 14%	21 10%				
			17%	34%	50%	17%	39%	25%	19%	47%	50%	21%	24%	25%	29%	18%	25%	29%	19%	5%	58%			
Retail	46 13%	13 12%	11 11%	22 16%	9 14%	12 10%	10 12%	15 22%	24 15%	27 19%	11 12%	13 17%	13 21%	9 7%	17 22%	15 21%	20 20%	16 26%	2 12%	29 13%				
Financial Services			27%	24%	48%	20%	25%	22%	32%	52%	58%	m 23%	m 29%	m 29%	m 19%	m 36%	m 34%	m 44%	ms 34%					
	36 10%	7 6%	11 11%	18 13%	5 7%	9 8%	12 14%	11 16%	21 13%	12 9%	16 18%	8 10%	4 7%	7 6%	14 19%	7 9%	17 17%	9 15%	2 14%	24 11%				
			18%	31%	50%	13%	25%	32%	29%	57%	34%	46%	23%	12%	20%	ilm 38%	20%	ilm 46%	26%	5%	66%			
Other services	75 22%	43 41%	10 10%	22 16%	21 30%	28 24%	10 12%	11 17%	31 20%	19 14%	21 23%	10 13%	10 15%	34 30%	11 15%	9 12%	13 13%	2 3%	4 33%	48 22%				
		bc			f	f			q	q	q		q	iklnopq	q		q							
		57%	13%	30%	28%	37%	13%	15%	41%	26%	28%	13%	13%	46%	15%	12%	18%	3%	6%	63%				
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																								

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 2**

**S5. Which of these best describes the sector your business operates in? (SINGLE CODE)**

Base : All respondents

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION										IP NOT SWITCHED	ANY IP
	Total	1-49	50-249	250+	UNDER £1M	£1M-£20M	£21M-£100M	OVER £100M	ISDN2	ISDN30 ONLY	ISDN2 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN30 & IP	IP SWITCHED	ISDN		
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q	*r	s
Unweighted total	350	72	84	192	53	109	95	83	165	161	89	85	76	100	91	85	118	67	16	218
Effective Weighted Sample	289	61	83	178	42	92	86	76	115	157	54	82	75	97	75	84	102	58	14	197
Total	350	106	101	142	69	118	83	67	156	142	92	77	64	116	74	74	100	61	13	216
		30%	29%	41%	20%	34%	24%	19%	45%	40%	26%	22%	18%	33%	21%	21%	28%	17%	4%	62%
Public admin and services	37	8	11	18	9	11	7	7	11	12	5	6	6	20	4	5	6	2	1	26
	11%	8%	11%	13%	13%	9%	8%	10%	7%	9%	6%	8%	9%	17%	5%	7%	6%	3%	6%	12%
		22%	29%	49%	24%	29%	18%	18%	30%	33%	14%	17%	16%	53%	10%	13%	17%	4%	2%	70%
Other	7	4	-	2	-	4	1	1	4	1	4	1	-	2	*	-	*	-	-	3
	2%	4%	-%	2%	-%	4%	1%	1%	2%	1%	4%	1%	-%	2%	1%	-%	*%	-%	-%	1%
		67%	-%	33%	-%	67%	18%	15%	54%	12%	54%	12%	-%	34%	6%	-%	6%	-%	-%	41%

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 2**

**S5. Which of these best describes the sector your business operates in? (SINGLE CODE)**

Base : All respondents

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q
Unweighted total	350	123	94	133	88	53	83	54	154	64	160	57	140	20	150	200	139	193
Effective Weighted Sample	289	83	91	125	60	37	80	53	141	57	127	39	115	14	127	162	110	176
Total	350	124	85	141	82	57	73	49	158	58	153	56	130	22	160	190	162	171
		35%	24%	40%	24%	16%	21%	14%	45%	17%	44%	16%	37%	6%	46%	54%	46%	49%
Primary (Extraction, mining, agriculture, forestry etc.)	16	8	6	2	4	4	4	5	7	-	13	1	11	2	10	7	4	13
	5%	6%	7%	1%	5%	7%	6%	11%	4%	-%	9%	1%	9%	9%	6%	3%	2%	7%
			c					i										
		49%	38%	13%	25%	25%	27%	32%	42%	-%	83%	5%	70%	12%	59%	41%	23%	77%
Manufacturing	59	18	20	21	16	9	19	8	31	9	31	7	29	2	22	37	23	35
	17%	15%	23%	15%	19%	16%	26%	16%	20%	15%	20%	13%	22%	7%	14%	19%	14%	20%
		31%	33%	36%	27%	16%	32%	13%	52%	15%	52%	13%	49%	3%	38%	62%	40%	59%
Construction	38	11	11	15	8	5	4	7	12	8	16	6	14	2	28	9	22	15
	11%	9%	13%	11%	9%	9%	6%	15%	8%	13%	10%	11%	10%	10%	18%	5%	14%	9%
															o			
		30%	29%	41%	21%	14%	11%	20%	32%	20%	42%	17%	36%	6%	76%	24%	59%	40%
Wholesale/Transport/Communications	36	12	12	12	8	7	9	7	10	10	19	5	16	3	18	18	12	23
	10%	9%	14%	9%	10%	12%	12%	14%	7%	18%	13%	8%	12%	14%	11%	10%	7%	13%
		32%	34%	34%	23%	19%	25%	19%	29%	29%	53%	13%	44%	9%	50%	50%	34%	63%
Retail	46	21	13	11	15	7	18	7	17	11	32	3	29	3	29	17	16	29
	13%	17%	16%	8%	19%	13%	24%	13%	11%	20%	21%	5%	22%	12%	18%	9%	10%	17%
							h											
		46%	29%	25%	34%	16%	38%	14%	38%	25%	69%	7%	63%	6%	62%	38%	34%	63%
Financial Services	36	17	6	13	8	9	6	4	18	6	17	7	14	3	14	22	13	20
	10%	14%	7%	9%	10%	16%	8%	8%	11%	11%	11%	12%	10%	15%	9%	12%	8%	12%
		48%	17%	35%	22%	26%	17%	10%	49%	17%	47%	18%	38%	9%	38%	62%	36%	55%
Other services	75	24	9	41	17	8	8	4	38	10	18	16	11	7	31	45	50	21
	22%	20%	11%	29%	20%	15%	11%	9%	24%	17%	12%	28%	8%	32%	19%	24%	31%	12%
				b					fg								q	
		32%	13%	55%	22%	11%	11%	6%	50%	13%	24%	21%	14%	9%	41%	59%	66%	27%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 2

S5. Which of these best describes the sector your business operates in? (SINGLE CODE)

Base : All respondents

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN30			ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		ISDN2	b	c														
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	*m	n	o	p	q
Unweighted total	350	123	94	133	88	53	83	54	154	64	160	57	140	20	150	200	139	193
Effective Weighted Sample	289	83	91	125	60	37	80	53	141	57	127	39	115	14	127	162	110	176
Total	350	124	85	141	82	57	73	49	158	58	153	56	130	22	160	190	162	171
		35%	24%	40%	24%	16%	21%	14%	45%	17%	44%	16%	37%	6%	46%	54%	46%	49%
Public admin and services	37	8	7	22	4	6	4	6	22	4	7	8	6	*	7	30	18	15
	11%	7%	8%	16%	4%	11%	6%	12%	14%	7%	4%	15%	5%	2%	5%	16%	11%	9%
				a					d			j			n			
		22%	18%	60%	10%	17%	11%	16%	59%	11%	18%	22%	16%	1%	20%	80%	48%	41%
Other	7	3	1	3	3	-	-	1	3	-	1	3	1	-	1	5	4	1
	2%	3%	1%	2%	4%	-%	-%	2%	2%	-%	1%	6%	1%	-%	1%	3%	3%	1%
				j					j			j						
		47%	12%	41%	47%	-%	-%	12%	41%	-%	12%	47%	12%	-%	18%	82%	63%	18%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 2**

**S5. Which of these best describes the sector your business operates in? (SINGLE CODE)**

Base : All respondents

	Total	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
		LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	*k	l	m	n	o	p	q	r
Unweighted total	350	34	128	55	138	55	99	33	156	51	110	22	88	155	92	82	127	156	62
Effective Weighted Sample	289	25	107	37	107	39	72	25	121	41	81	15	77	143	85	74	116	140	57
Total	350	33 9%	119 34%	57 16%	131 38%	53 15%	95 27%	39 11%	151 43%	45 13%	111 32%	22 6%	84 24%	151 43%	85 24%	88 25%	121 35%	153 44%	63 18%
Primary (Extraction, mining, agriculture, forestry etc.)	16 5%	3 9%	11 9%	1 1%	13 10% e	- -%	9 10%	- -%	12 8%	3 6%	9 8%	- -%	4 5%	2 2%	4 5%	4 5%	2 2%	5 3%	2 3%
			18%	65%	5% 83% e	-%	58%	-%	71%	16%	58%	-%	25%	15%	26%	28%	15%	32%	10%
Manufacturing	59 17%	4 11%	27 23%	7 13%	31 24% e	3 6%	13 14%	6 16%	29 19%	7 16%	17 15%	2 11%	18 21%	32 21%	14 16%	16 18%	24 19%	36 24% r	4 6%
			6%	46%	12% 52% e	5%	22%	10%	50%	12%	28%	4%	30%	54%	24%	27%	40%	61% r	6%
Construction	38 11%	5 16%	12 10%	5 8%	14 11%	6 12%	13 14%	5 12%	18 12%	3 6%	16 15%	2 7%	4 5%	14 10%	10 11%	9 11%	10 8%	15 10%	4 7%
			14%	32%	13% 37% e	17%	35%	13%	47%	8%	44%	4%	12%	38%	26%	25%	27%	41%	11%
Wholesale/Transport/Communications	36 10%	2 7%	17 14%	5 8%	14 11%	7 13%	11 12%	4 11%	18 12%	5 10%	12 11%	3 15%	9 10%	15 10%	12 15%	11 13%	10 8%	15 10%	6 9%
			7%	46%	13% 39% g	19%	31%	12%	49%	13%	33%	9%	24%	42%	34%	31%	27%	43%	15%
Retail	46 13%	12 35% bc	20 17%	3 6%	28 21%	6 11%	17 18%	* 1%	28 18%	6 14%	17 15%	1 4%	13 15%	20 13%	14 17%	9 10%	18 15%	20 13%	8 13%
			25%	43%	7% 61% g	12%	37%	1%	60%	13%	36%	2%	28%	44%	31%	20%	40%	44%	19%
Financial Services	36 10%	4 13%	15 12%	5 9%	12 9%	6 12%	6 6%	6 16%	15 10%	8 19%	11 10%	1 4%	10 12%	14 9%	9 11%	9 10%	14 11%	17 11%	7 10%
					33% 17% g	17%	17%	17%	41%	23%	31%	3%	29%	40%	25%	25%	38%	48%	18%
Other services	75 22%	2 6%	11 9%	21 37% ab	15 12%	18 34% d	15 16%	12 31%	22 14%	11 24%	19 17%	8 37%	15 18%	34 22%	14 17%	20 23%	25 21%	24 16%	24 37% q
			3%	14%	28% ab	20%	24%	21%	29%	14%	26%	11%	20%	45%	19%	27%	34%	32%	31%
Columns Tested:	a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																		

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 2

S5. Which of these best describes the sector your business operates in? (SINGLE CODE)

Base : All respondents

	SWITCHING ISDN SUPPLIER				CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
	Total	NEVER			YES	NO	YES	NO/DK	UP TO		YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO		YES	NO/DK
		LAST YEAR	EVER	/DK					3 YEARS	4+ YEARS						2 YEARS	OVER 2 YEARS		
Significance Level: 95%	a	b	c	d	e	f	g	h	i	j	*k	l	m	n	o	p	q	r	
Unweighted total	350	34	128	55	138	55	99	33	156	51	110	22	88	155	92	82	127	156	62
Effective Weighted Sample	289	25	107	37	107	39	72	25	121	41	81	15	77	143	85	74	116	140	57
Total	350	33	119	57	131	53	95	39	151	45	111	22	84	151	85	88	121	153	63
		9%	34%	16%	38%	15%	27%	11%	43%	13%	32%	6%	24%	43%	24%	25%	35%	44%	18%
Public admin and services	37	1	7	7	3	4	6	5	9	2	6	5	9	18	8	8	16	18	8
	11%	4%	6%	12%	2%	7%	6%	13%	6%	5%	6%	22%	11%	12%	9%	9%	13%	12%	13%
		3%	18%	18%	7%	10%	16%	14%	25%	6%	17%	13%	25%	48%	20%	21%	44%	48%	22%
Other	7	-	1	3	1	3	4	-	1	-	4	-	2	1	-	1	2	1	1
	2%	-%	1%	5%	1%	6%	4%	-%	1%	-%	4%	-%	2%	1%	-%	1%	1%	1%	2%
		-%	12%	47%	12%	47%	59%	-%	12%	-%	59%	-%	25%	21%	-%	15%	25%	19%	21%
Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																			

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 3**

**S6A. Including yourself, how many people does your organisation currently employ in the UK either full or part time? (SINGLE CODE)**

Base : All respondents

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION												
	Total	UNDER			£1M- £20M	£21M-£100M	OVER £100M	ISDN2	ISDN30	ISDN2		ISDN30	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP SWITCHED		IP NOT SWITCHED	ANY IP
		1-49	50-249	250+						ONLY	ONLY							ISDN	ISDN		
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q	r	s	
Unweighted total	350	72	84	192	53	109	95	83	165	161	89	85	76	100	91	85	118	67	16	218	
Effective Weighted Sample	289	61	83	178	42	92	86	76	115	157	54	82	75	97	75	84	102	58	14	197	
Total	350	106	101	142	69	118	83	67	156	142	92	77	64	116	74	74	100	61	13	216	
		30%	29%	41%	20%	34%	24%	19%	45%	40%	26%	22%	18%	33%	21%	21%	28%	17%	4%	62%	
1	8	8	-	-	6	-	-	-	6	-	6	-	-	1	-	-	-	-	-	1	
	2%	7%	-%	-%	9%	-%	-%	-%	4%	-%	7%	-%	-%	1%	-%	-%	-%	-%	-%	1%	
		bc			efg				is		iknops										
		100%	-%	-%	82%	-%	-%	-%	82%	-%	82%	-%	-%	18%	-%	-%	-%	-%	-%	18%	
2-4	12	12	-	-	11	1	-	-	3	3	3	3	-	6	-	1	1	1	-	7	
	3%	11%	-%	-%	16%	1%	-%	-%	2%	2%	3%	4%	-%	5%	-%	2%	1%	2%	-%	3%	
		bc			efg									n							
		100%	-%	-%	91%	9%	-%	-%	26%	28%	26%	28%	-%	47%	-%	9%	9%	9%	-%	56%	
5-9	9	9	-	-	5	4	-	-	4	3	3	2	1	3	1	1	1	1	-	4	
	3%	9%	-%	-%	7%	4%	-%	-%	3%	2%	3%	3%	2%	2%	2%	2%	1%	2%	-%	2%	
		bc			fg																
		100%	-%	-%	54%	46%	-%	-%	46%	36%	33%	24%	12%	30%	12%	12%	12%	12%	-%	42%	
10-19	34	34	-	-	13	18	-	-	17	7	16	6	1	11	3	-	3	3	-	14	
	10%	32%	-%	-%	19%	15%	-%	-%	11%	5%	17%	7%	2%	10%	4%	-%	3%	5%	-%	7%	
		bc			fg	fg			lop	o	ilnops	o		lo				o		o	
		100%	-%	-%	39%	52%	-%	-%	50%	20%	46%	17%	3%	34%	9%	-%	9%	9%	-%	43%	
20-49	43	43	-	-	17	16	1	5	16	13	14	11	2	16	5	4	8	4	4	24	
	12%	41%	-%	-%	25%	14%	1%	8%	10%	9%	15%	14%	3%	14%	7%	5%	8%	7%	29%	11%	
		bc			fg	f		f			l	l		l						l	
		100%	-%	-%	40%	37%	2%	12%	37%	30%	32%	25%	5%	38%	12%	9%	19%	10%	9%	57%	
50-249	101	-	101	-	8	49	40	3	43	37	29	24	13	35	20	25	33	24	2	68	
	29%	-%	100%	-%	12%	41%	48%	4%	27%	26%	32%	31%	21%	30%	27%	33%	33%	40%	19%	32%	
			ac			dg	dg											l			
		-%	100%	-%	8%	48%	39%	3%	42%	37%	29%	23%	13%	35%	19%	24%	33%	24%	2%	67%	
250-999	91	-	-	91	7	21	30	33	44	52	12	20	32	27	32	33	38	23	3	65	
	26%	-%	-%	64%	10%	18%	36%	49%	28%	37%	13%	25%	50%	23%	43%	45%	38%	37%	21%	30%	
				ab			de	de	j	jm			hjkms		hjkms	hjkms	jm	j		j	
		-%	-%	100%	7%	23%	33%	36%	49%	57%	13%	22%	36%	30%	35%	37%	42%	25%	3%	72%	
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																					

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s



# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 3**

**S6A. Including yourself, how many people does your organisation currently employ in the UK either full or part time? (SINGLE CODE)**

Base : All respondents

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION										IP NOT SWITCHED	ANY IP
	Total	1-49	50-249	250+	UNDER £1M	£1M-£20M	£21M-£100M	OVER £100M	ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP SWITCHED		
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q	*r	s
Unweighted total	350	72	84	192	53	109	95	83	165	161	89	85	76	100	91	85	118	67	16	218
Effective Weighted Sample	289	61	83	178	42	92	86	76	115	157	54	82	75	97	75	84	102	58	14	197
Total	350	106	101	142	69	118	83	67	156	142	92	77	64	116	74	74	100	61	13	216
		30%	29%	41%	20%	34%	24%	19%	45%	40%	26%	22%	18%	33%	21%	21%	28%	17%	4%	62%
1,000+	52	-	-	52	1	9	12	26	23	26	9	12	14	17	13	10	15	4	4	32
	15%	-%	-%	36%	2%	8%	15%	39%	15%	18%	10%	15%	22%	15%	18%	14%	15%	7%	31%	15%
				ab			d	def		q			q							
		-%	-%	100%	2%	18%	24%	51%	44%	50%	17%	23%	27%	33%	26%	20%	29%	8%	8%	61%

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 3

S6A. Including yourself, how many people does your organisation currently employ in the UK either full or part time? (SINGLE CODE)

Base : All respondents

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q
Significance Level: 95%																		
Unweighted total	350	123	94	133	88	53	83	54	154	64	160	57	140	20	150	200	139	193
Effective Weighted Sample	289	83	91	125	60	37	80	53	141	57	127	39	115	14	127	162	110	176
Total	350	124	85	141	82	57	73	49	158	58	153	56	130	22	160	190	162	171
		35%	24%	40%	24%	16%	21%	14%	45%	17%	44%	16%	37%	6%	46%	54%	46%	49%
1	8	6	-	1	-	6	-	-	1	-	-	6	-	-	5	3	8	-
	2%	5%	-%	1%	-%	11%	-%	-%	1%	-%	-%	11%	-%	-%	3%	2%	5%	-%
		b				dghi						j					q	
		82%	-%	18%	-%	82%	-%	-%	18%	-%	-%	82%	-%	-%	59%	41%	100%	-%
2-4	12	3	3	6	3	-	2	1	5	1	2	4	1	1	5	7	11	-
	3%	3%	4%	4%	4%	-%	3%	2%	3%	2%	1%	8%	1%	5%	3%	4%	7%	-%
																	q	
		26%	28%	47%	26%	-%	18%	9%	44%	12%	18%	35%	9%	9%	42%	58%	91%	-%
5-9	9	4	2	3	-	4	-	3	4	-	5	1	2	3	4	6	8	-
	3%	3%	3%	2%	-%	7%	-%	7%	3%	-%	4%	2%	2%	14%	2%	3%	5%	-%
						df		dfi									q	
		46%	24%	30%	-%	46%	-%	36%	42%	-%	58%	12%	24%	33%	39%	61%	88%	-%
10-19	34	17	6	11	12	4	6	1	12	3	16	6	13	3	21	13	31	3
	10%	14%	7%	8%	15%	7%	8%	2%	7%	5%	10%	12%	10%	14%	13%	7%	19%	2%
					g												q	
		50%	17%	34%	37%	13%	17%	3%	34%	8%	47%	19%	38%	9%	61%	39%	92%	8%
20-49	43	15	12	16	8	8	8	5	20	5	22	5	16	5	28	15	27	12
	12%	12%	14%	12%	10%	13%	11%	10%	13%	8%	14%	10%	13%	23%	17%	8%	17%	7%
															o		q	
		35%	28%	38%	19%	18%	18%	11%	46%	11%	50%	12%	38%	12%	64%	36%	63%	28%
50-249	101	35	26	41	21	19	19	14	46	22	46	15	44	1	53	49	44	54
	29%	28%	30%	29%	26%	34%	25%	30%	29%	37%	30%	27%	34%	6%	33%	26%	27%	31%
		35%	25%	40%	21%	19%	18%	14%	46%	21%	45%	15%	44%	1%	52%	48%	43%	53%
250-999	91	29	23	39	24	10	26	16	46	19	40	12	36	4	35	55	24	63
	26%	23%	27%	28%	30%	18%	36%	32%	29%	32%	26%	21%	28%	16%	22%	29%	15%	37%
																	p	
		32%	25%	43%	27%	12%	29%	17%	51%	20%	44%	13%	40%	4%	39%	61%	26%	69%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 3

S6A. Including yourself, how many people does your organisation currently employ in the UK either full or part time? (SINGLE CODE)

Base : All respondents

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	b	c	d	e	f	g	h	i	j	k	l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	350	123	94	133	88	53	83	54	154	64	160	57	140	20	150	200	139	193
Effective Weighted Sample	289	83	91	125	60	37	80	53	141	57	127	39	115	14	127	162	110	176
Total	350	124	85	141	82	57	73	49	158	58	153	56	130	22	160	190	162	171
		35%	24%	40%	24%	16%	21%	14%	45%	17%	44%	16%	37%	6%	46%	54%	46%	49%
1,000+	52	15	13	24	13	5	13	8	23	9	22	6	18	5	10	42	10	39
	15%	12%	16%	17%	16%	9%	17%	16%	14%	16%	15%	10%	13%	21%	6%	22% n	6%	23% p
		28%	26%	46%	25%	9%	24%	15%	44%	18%	43%	11%	34%	9%	20%	80%	19%	76%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 3**

**S6A. Including yourself, how many people does your organisation currently employ in the UK either full or part time? (SINGLE CODE)**

Base : All respondents

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
	Total	NEVER			YES	NO	YES	NO/DK	UP TO		YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
		LAST YEAR	EVER	/DK					3 YEARS	4+ YEARS									
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	*k	l	m	n	o	p	q	r
Unweighted total	350	34	128	55	138	55	99	33	156	51	110	22	88	155	92	82	127	156	62
Effective Weighted Sample	289	25	107	37	107	39	72	25	121	41	81	15	77	143	85	74	116	140	57
Total	350	33	119	57	131	53	95	39	151	45	111	22	84	151	85	88	121	153	63
		9%	34%	16%	38%	15%	27%	11%	43%	13%	32%	6%	24%	43%	24%	25%	35%	44%	18%
1	8	-	-	6	-	3	-	6	-	3	3	3	-	1	-	1	-	1	-
	2%	-%	-%	11%	-%	6%	-%	16%	-%	7%	3%	14%	-%	1%	-%	2%	-%	1%	-%
				b		d		f		h									
				82%	-%	41%	-%	82%	-%	41%	41%	41%	-%	18%	-%	18%	-%	18%	-%
2-4	12	-	2	4	5	1	3	2	4	1	4	1	-	7	-	3	4	4	3
	3%	-%	2%	7%	4%	2%	3%	6%	3%	3%	4%	5%	-%	4%	-%	3%	4%	3%	4%
														n					
														56%	-%	21%	35%	33%	23%
5-9	9	1	4	1	4	1	4	1	5	1	5	-	1	3	1	3	1	3	1
	3%	3%	4%	2%	3%	2%	4%	3%	4%	3%	5%	-%	1%	2%	1%	3%	1%	2%	2%
		12%	46%	12%	46%	12%	46%	12%	58%	12%	58%	-%	12%	30%	12%	27%	15%	27%	15%
10-19	34	7	6	8	14	7	14	5	17	1	15	4	6	10	1	7	7	6	8
	10%	22%	5%	15%	11%	14%	15%	14%	11%	3%	13%	19%	7%	7%	2%	8%	6%	4%	13%
		b																q	
		22%	19%	25%	41%	22%	41%	16%	50%	3%	44%	13%	18%	29%	4%	22%	21%	18%	25%
20-49	43	2	14	11	12	11	12	7	21	5	14	5	7	12	10	14	9	18	6
	12%	6%	12%	19%	9%	21%	13%	17%	14%	11%	13%	21%	8%	8%	11%	16%	8%	12%	10%
		5%	32%	25%	28%	25%	28%	15%	48%	11%	32%	11%	17%	28%	23%	32%	21%	42%	14%
50-249	101	6	48	7	41	10	24	10	48	12	32	1	29	46	26	33	34	49	19
	29%	18%	40%	12%	31%	20%	25%	25%	32%	26%	29%	5%	35%	30%	31%	37%	28%	32%	31%
			ac																
		6%	47%	7%	41%	10%	23%	10%	47%	12%	32%	1%	29%	45%	26%	32%	33%	48%	19%
250-999	91	11	30	11	37	12	21	5	35	15	21	4	32	52	31	18	46	49	16
	26%	34%	25%	19%	28%	22%	22%	12%	23%	34%	19%	20%	38%	34%	36%	20%	38%	32%	25%
																o			
		12%	33%	12%	40%	13%	23%	5%	38%	17%	23%	5%	36%	57%	34%	20%	50%	54%	18%
Columns Tested:	a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																		

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 3**

**S6A. Including yourself, how many people does your organisation currently employ in the UK either full or part time? (SINGLE CODE)**

Base : All respondents

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%	a	b	c	d	e	f	g	h	i	j	*k	l	m	n	o	p	q	r	
Unweighted total	350	34	128	55	138	55	99	33	156	51	110	22	88	155	92	82	127	156	62
Effective Weighted Sample	289	25	107	37	107	39	72	25	121	41	81	15	77	143	85	74	116	140	57
Total	350	33	119	57	131	53	95	39	151	45	111	22	84	151	85	88	121	153	63
		9%	34%	16%	38%	15%	27%	11%	43%	13%	32%	6%	24%	43%	24%	25%	35%	44%	18%
1,000+	52	6	14	8	18	7	17	3	21	6	16	4	8	21	16	9	20	23	9
	15%	17%	12%	14%	14%	14%	18%	7%	14%	14%	15%	16%	10%	14%	19%	11%	16%	15%	14%
		11%	28%	16%	35%	14%	33%	5%	41%	12%	32%	7%	16%	40%	30%	18%	38%	44%	17%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 4**

**S6B. Thinking about your company's current telecoms provisions, which of the following types of business communication service does your company have? (MULTI CODE)**

Base : All respondents

	Total	COMPANY SIZE			TURNOVER				TELECOMS PROVISION												IP SWITCHED		IP NOT SWITCHED		ANY IP
		1-49 a	50-249 b	250+ c	UNDER				ISDN2 h	ISDN30 i	ISDN2 ONLY j	ISDN30 ONLY k	BOTH ISDN l	IP NOT ISDN m	ISDN2 & IP n	ISDN30 & IP o	ISDN & IP p	ISDN q	ISDN *r						
					£1M d	£1M-£20M e	£21M-£100M f	OVER £100M g																	
Significance Level: 95%																									
Unweighted total	350	72	84	192	53	109	95	83	165	161	89	85	76	100	91	85	118	67	16	218					
Effective Weighted Sample	289	61	83	178	42	92	86	76	115	157	54	82	75	97	75	84	102	58	14	197					
Total	350	106 30%	101 29%	142 41%	69 20%	118 34%	83 24%	67 19%	156 45%	142 40%	92 26%	77 22%	64 18%	116 33%	74 21%	74 21%	100 28%	61 17%	13 4%	216 62%					
Mobile phones (including Smartphones)	263 75%	63 60%	81 80%	119 83%	45 66%	83 70%	67 81%	61 91%	120 77%	103 73%	65 71%	49 63%	55 85%	95 81%	68 92%	68 92%	90 90%	53 87%	12 91%	184 85%					
			a	a				de	k				ik	k	hijk	hijkm	hijk	ijk		ijk					
		24%	31%	45%	17%	32%	26%	23%	46%	39%	25%	18%	21%	36%	26%	26%	34%	20%	4%	70%					
IP based alternatives to ISDN (e.g. SIP trunks, hosted VOIP)	216 62%	51 48%	68 67%	97 68%	38 55%	67 57%	51 61%	52 77%	74 48%	74 53%	25 28%	25 33%	49 76%	116 100%	74 100%	74 100%	100 100%	61 100%	13 100%	216 100%					
			a	a				def	jk	jk			hijk	hijkl	hijkl	hijkl	hijkl	hijkl		hijkl					
		24%	32%	45%	18%	31%	24%	24%	34%	34%	12%	12%	23%	54%	34%	34%	46%	28%	6%	100%					
Cable modem or ADSL Fixed line broadband	201 57%	43 41%	69 68%	89 62%	29 43%	64 54%	57 69%	46 68%	100 64%	86 61%	50 55%	37 48%	49 77%	64 55%	58 79%	59 79%	74 74%	44 72%	9 66%	138 64%					
			a	a			de	d	k				ijkms		hijkms	hijkms	ijkm	km		k					
		21%	34%	44%	15%	32%	28%	23%	50%	43%	25%	18%	25%	32%	29%	29%	37%	22%	4%	69%					
Virtual Private Networks	187 54%	32 31%	65 64%	90 63%	25 37%	45 38%	65 78%	47 71%	96 61%	92 65%	44 48%	40 52%	51 80%	51 44%	58 78%	60 80%	77 77%	44 73%	10 74%	128 60%					
			a	a			de	de	m	jm			hijkms		hijkms	hijkms	hijkms	jkm		m					
		17%	35%	48%	13%	24%	35%	25%	51%	49%	24%	22%	27%	27%	31%	32%	41%	24%	5%	69%					
Ethernet	177 51%	37 35%	53 52%	87 61%	23 34%	51 43%	52 63%	45 67%	85 54%	79 56%	40 44%	35 45%	45 69%	58 49%	54 72%	54 72%	69 69%	37 60%	11 84%	126 58%					
			a	a			de	de					hijkms		hijkms	hijkms	hijkms			k					
		21%	30%	49%	13%	29%	29%	25%	48%	45%	23%	20%	25%	32%	30%	30%	39%	21%	6%	71%					
Analogue telephone line(s) i.e. fixed telephone lines that are not ISDN lines	172 49%	42 40%	50 49%	80 56%	28 41%	55 47%	41 49%	40 60%	93 59%	83 59%	46 50%	37 48%	46 72%	42 36%	53 71%	54 73%	68 68%	40 66%	8 65%	110 51%					
				a				d	m	m			ijkms		jkms	ijkms	jkms	km		m					
		25%	29%	46%	16%	32%	24%	24%	54%	48%	27%	21%	27%	25%	31%	32%	40%	23%	5%	64%					
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																									

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 4**

**S6B. Thinking about your company's current telecoms provisions, which of the following types of business communication service does your company have? (MULTI CODE)**

Base : All respondents

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & ISDN30 & IP	ISDN & IP	IP SWITCHED	IP NOT SWITCHED	ANY	
					£1M	£1M-£20M	£21M-£100M	OVER £100M									ISDN	ISDN		
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q	r	s
Unweighted total	350	72	84	192	53	109	95	83	165	161	89	85	76	100	91	85	118	67	16	218
Effective Weighted Sample	289	61	83	178	42	92	86	76	115	157	54	82	75	97	75	84	102	58	14	197
Total	350	106	101	142	69	118	83	67	156	142	92	77	64	116	74	74	100	61	13	216
		30%	29%	41%	20%	34%	24%	19%	45%	40%	26%	22%	18%	33%	21%	21%	28%	17%	4%	62%
ISDN 2/2e channels or Business Highway	156	46	43	67	29	45	43	35	156	64	92	-	64	-	74	49	74	47	9	74
	45%	44%	42%	47%	42%	38%	52%	52%	100%	45%	100%	-%	100%	-%	100%	66%	75%	77%	72%	34%
									ikmopqs	kms	ikmopqs		ikmopqs		ikmopqs	ikms	ikms	ikms		km
		30%	27%	43%	19%	29%	28%	22%	100%	41%	59%	-%	41%	-%	48%	31%	48%	30%	6%	48%
ISDN 30 channels	142	26	37	78	16	39	50	36	64	142	-	77	64	-	49	74	74	47	7	74
	40%	25%	37%	55%	23%	33%	60%	53%	41%	100%	-%	100%	100%	-%	66%	100%	75%	77%	52%	34%
			ab				de	de	jm	hjmnpqs		hjmnpqs	hjmnpqs		hjms	hjmnpqs	hjms	hjms		jm
		19%	26%	55%	11%	27%	35%	25%	45%	100%	-%	55%	45%	-%	35%	53%	53%	33%	5%	53%
Leased lines	105	16	31	58	9	25	35	33	57	67	17	27	40	21	45	48	58	37	6	79
	30%	15%	31%	40%	13%	21%	42%	49%	37%	47%	19%	35%	62%	18%	61%	64%	58%	62%	46%	36%
			a	a			de	de	jm	jms		jm	hijkms		hijkms	hijkms	hjkms	hjkms		jm
		15%	30%	55%	9%	23%	34%	31%	54%	64%	16%	26%	38%	20%	43%	45%	55%	36%	6%	75%
SDSL	96	10	30	56	5	20	35	31	67	66	21	19	47	10	44	47	53	32	6	62
	28%	10%	30%	39%	7%	17%	42%	47%	43%	46%	23%	25%	73%	8%	59%	63%	53%	53%	46%	29%
			a	a			de	de	jkms	jkms	m	m	hijkmpqs		hjkms	hijkms	jkms	jkms		m
		11%	31%	58%	5%	21%	36%	33%	70%	68%	21%	20%	48%	10%	45%	49%	55%	33%	6%	65%
Other business communications services	40	5	10	25	6	8	13	12	21	20	4	3	17	16	14	14	15	4	3	32
	11%	5%	10%	17%	9%	7%	15%	18%	13%	14%	4%	4%	26%	14%	19%	18%	16%	7%	23%	15%
			a				e	e	k	k			hijkmps	k	jkq	jk	jk			jk
		14%	24%	62%	15%	21%	32%	30%	52%	49%	10%	7%	42%	41%	36%	34%	39%	11%	7%	79%
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																				

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 4

S6B. Thinking about your company's current telecoms provisions, which of the following types of business communication service does your company have? (MULTI CODE)

Base : All respondents

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q
Unweighted total	350	123	94	133	88	53	83	54	154	64	160	57	140	20	150	200	139	193
Effective Weighted Sample	289	83	91	125	60	37	80	53	141	57	127	39	115	14	127	162	110	176
Total	350	124	85	141	82	57	73	49	158	58	153	56	130	22	160	190	162	171
		35%	24%	40%	24%	16%	21%	14%	45%	17%	44%	16%	37%	6%	46%	54%	46%	49%
Mobile phones (including Smartphones)	263	90	55	118	65	38	54	30	133	51	105	40	93	11	110	153	116	135
	75%	73%	64%	84%	79%	66%	74%	61%	85%	88%	69%	71%	71%	51%	69%	81%	72%	79%
				b	g				eg	eg						n		
		34%	21%	45%	25%	14%	21%	11%	51%	19%	40%	15%	35%	4%	42%	58%	44%	52%
IP based alternatives to ISDN (e.g. SIP trunks, hosted VOIP)	216	44	31	141	37	21	35	20	158	58	65	10	64	1	95	121	97	108
	62%	36%	36%	100%	45%	36%	48%	40%	100%	100%	42%	18%	49%	4%	60%	64%	60%	63%
				ab					defg	defg	k							
		20%	14%	65%	17%	10%	16%	9%	73%	27%	30%	5%	30%	3%	44%	56%	45%	50%
Cable modem or ADSL Fixed line broadband	201	72	45	85	58	27	44	26	100	38	85	32	77	8	84	117	86	111
	57%	58%	53%	60%	70%	47%	60%	53%	64%	65%	56%	56%	59%	35%	53%	62%	53%	65%
					e												p	
		36%	22%	42%	29%	13%	22%	13%	50%	19%	42%	16%	38%	4%	42%	58%	43%	55%
Virtual Private Networks	187	67	45	75	51	28	49	24	95	34	96	16	88	8	80	107	71	113
	54%	54%	53%	53%	62%	49%	67%	49%	60%	58%	63%	29%	68%	36%	50%	56%	44%	66%
					g						k						p	
		36%	24%	40%	27%	15%	26%	13%	50%	18%	51%	9%	47%	4%	43%	57%	38%	60%
Ethernet	177	57	42	78	47	23	42	21	93	33	81	18	76	5	75	102	74	96
	51%	46%	49%	55%	57%	41%	57%	43%	59%	56%	53%	32%	59%	21%	47%	54%	46%	56%
					eg				eg		k							
		32%	24%	44%	27%	13%	24%	12%	53%	18%	46%	10%	43%	3%	42%	58%	42%	54%
Analogue telephone line(s) i.e. fixed telephone lines that are not ISDN lines	172	74	37	61	51	31	38	28	76	34	89	22	80	10	77	95	69	95
	49%	60%	44%	43%	61%	54%	52%	57%	48%	58%	59%	39%	61%	44%	48%	50%	42%	56%
		bc									k						p	
		43%	22%	35%	29%	18%	22%	16%	44%	20%	52%	13%	46%	6%	45%	55%	40%	55%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q



# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 4

S6B. Thinking about your company's current telecoms provisions, which of the following types of business communication service does your company have? (MULTI CODE)

Base : All respondents

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30		ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q
Unweighted total	350	123	94	133	88	53	83	54	154	64	160	57	140	20	150	200	139	193
Effective Weighted Sample	289	83	91	125	60	37	80	53	141	57	127	39	115	14	127	162	110	176
Total	350	124	85	141	82	57	73	49	158	58	153	56	130	22	160	190	162	171
		35%	24%	40%	24%	16%	21%	14%	45%	17%	44%	16%	37%	6%	46%	54%	46%	49%
ISDN 2/2e channels or Business Highway	156	124	16	17	82	57	28	24	49	25	103	37	88	15	65	90	61	92
	45%	100%	18%	12%	100%	100%	38%	49%	31%	43%	67%	65%	67%	66%	41%	48%	37%	54%
		bc			fghi	fghi		h									p	
		79%	10%	11%	53%	36%	18%	15%	32%	16%	66%	23%	56%	9%	42%	58%	39%	59%
ISDN 30 channels	142	36	85	20	33	19	73	49	51	23	93	29	84	9	66	76	44	92
	40%	30%	100%	14%	40%	33%	100%	100%	32%	40%	61%	52%	64%	41%	41%	40%	27%	54%
		c	ac				dehi	dehi									p	
		26%	60%	14%	23%	13%	52%	34%	36%	17%	66%	20%	59%	7%	46%	54%	31%	65%
Leased lines	105	41	29	35	32	16	32	21	55	24	60	10	57	3	46	59	29	71
	30%	33%	34%	25%	39%	28%	44%	43%	35%	41%	40%	17%	44%	16%	28%	31%	18%	42%
											k						p	
		39%	28%	33%	30%	15%	31%	20%	52%	23%	58%	9%	54%	3%	43%	57%	28%	68%
SDSL	96	45	27	24	37	18	34	20	47	15	60	12	55	5	38	59	28	63
	28%	37%	31%	17%	45%	32%	46%	41%	30%	26%	39%	21%	42%	22%	24%	31%	17%	37%
		c	c		hi		hi				k						p	
		47%	28%	25%	39%	19%	35%	21%	49%	16%	62%	12%	57%	5%	39%	61%	29%	66%
Other business communications services	40	11	4	24	8	6	6	6	20	12	11	5	11	-	13	27	18	22
	11%	9%	5%	17%	9%	11%	8%	12%	12%	21%	7%	8%	8%	-%	8%	14%	11%	13%
				b						f								
		29%	10%	61%	19%	15%	14%	14%	49%	30%	27%	12%	27%	-%	32%	68%	44%	54%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 4

S6B. Thinking about your company's current telecoms provisions, which of the following types of business communication service does your company have? (MULTI CODE)

Base : All respondents

	Total	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
		NEVER			YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
		LAST YEAR	EVER	/DK															
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	*k	l	m	n	o	p	q	r
Unweighted total	350	34	128	55	138	55	99	33	156	51	110	22	88	155	92	82	127	156	62
Effective Weighted Sample	289	25	107	37	107	39	72	25	121	41	81	15	77	143	85	74	116	140	57
Total	350	33	119	57	131	53	95	39	151	45	111	22	84	151	85	88	121	153	63
		9%	34%	16%	38%	15%	27%	11%	43%	13%	32%	6%	24%	43%	24%	25%	35%	44%	18%
Mobile phones (including Smartphones)	263	25	74	45	81	42	53	25	95	38	63	16	73	134	71	76	103	131	54
	75%	75%	63%	80%	62%	79%	56%	65%	63%	84%	56%	70%	86%	89%	83%	86%	85%	85%	85%
		9%	28%	17%	31%	16%	20%	10%	36%	14%	24%	6%	28%	51%	27%	29%	39%	50%	20%
IP based alternatives to ISDN (e.g. SIP trunks, hosted VOIP)	216	15	45	14	55	14	-	-	57	17	-	-	84	151	85	88	121	153	63
	62%	46%	38%	25%	42%	27%	-%	-%	38%	37%	-%	-%	100%	100%	100%	100%	100%	100%	100%
		7%	21%	7%	25%	7%	-%	-%	26%	8%	-%	-%	39%	70%	39%	41%	56%	71%	29%
Cable modem or ADSL Fixed line broadband	201	28	59	29	74	28	42	21	80	29	52	11	58	105	61	54	83	94	45
	57%	85%	50%	51%	56%	53%	44%	54%	53%	65%	46%	50%	69%	70%	72%	61%	68%	61%	71%
		bc																	
		14%	30%	14%	37%	14%	21%	11%	40%	15%	26%	6%	29%	52%	30%	27%	41%	47%	22%
Virtual Private Networks	187	25	68	19	80	23	45	14	90	22	52	7	62	94	59	52	75	96	32
	54%	77%	58%	33%	61%	44%	47%	36%	60%	49%	47%	30%	73%	62%	69%	59%	62%	63%	51%
		c	c																
		14%	36%	10%	43%	12%	24%	7%	48%	12%	28%	4%	33%	50%	31%	28%	40%	51%	17%
Ethernet	177	22	51	27	61	25	38	13	72	24	46	5	53	94	56	47	75	90	36
	51%	66%	43%	47%	47%	47%	40%	33%	48%	53%	41%	24%	63%	62%	66%	53%	62%	59%	57%
		b																	
		12%	29%	15%	35%	14%	21%	7%	41%	13%	26%	3%	30%	53%	32%	26%	42%	51%	20%
Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																			

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 4

S6B. Thinking about your company's current telecoms provisions, which of the following types of business communication service does your company have? (MULTI CODE)

Base : All respondents

		SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
		Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	*k	l	m	n	o	p	q	r	
Unweighted total	350	34	128	55	138	55	99	33	156	51	110	22	88	155	92	82	127	156	62	
Effective Weighted Sample	289	25	107	37	107	39	72	25	121	41	81	15	77	143	85	74	116	140	57	
Total	350	33	119	57	131	53	95	39	151	45	111	22	84	151	85	88	121	153	63	
		9%	34%	16%	38%	15%	27%	11%	43%	13%	32%	6%	24%	43%	24%	25%	35%	44%	18%	
Analogue telephone line(s) i.e. fixed telephone lines that are not ISDN lines	172	28	57	27	74	24	46	16	80	28	52	9	47	71	53	47	58	78	32	
	49%	84%	48%	47%	57%	46%	48%	40%	53%	63%	47%	42%	56%	47%	62%	54%	48%	51%	50%	
		bc													m					
		16%	33%	16%	43%	14%	27%	9%	46%	16%	30%	5%	27%	41%	31%	27%	34%	46%	19%	
ISDN 2/2e channels or Business Highway	156	27	76	37	91	33	56	25	103	26	69	13	42	50	39	25	47	57	17	
	45%	81%	64%	64%	69%	62%	60%	65%	68%	58%	62%	56%	50%	33%	46%	28%	39%	37%	27%	
													m							
		17%	49%	23%	58%	21%	36%	16%	66%	17%	44%	8%	27%	32%	25%	16%	30%	37%	11%	
ISDN 30 channels	142	22	74	25	83	26	51	16	91	28	56	11	40	55	39	30	43	58	17	
	40%	68%	62%	44%	63%	49%	54%	42%	60%	63%	51%	48%	47%	36%	45%	34%	36%	38%	26%	
		16%	52%	18%	59%	18%	36%	11%	64%	20%	40%	8%	28%	39%	27%	21%	30%	41%	12%	
Leased lines	105	17	42	11	53	11	19	7	51	18	23	3	46	53	39	32	43	61	18	
	30%	52%	35%	19%	40%	21%	20%	19%	34%	40%	21%	15%	54%	35%	45%	36%	35%	40%	28%	
		c			e								m							
		16%	40%	10%	50%	11%	18%	7%	49%	17%	22%	3%	44%	51%	37%	30%	41%	58%	17%	
SDSL	96	21	41	10	53	12	25	9	56	16	31	3	38	43	35	23	38	51	12	
	28%	63%	35%	17%	41%	22%	27%	22%	37%	37%	28%	12%	45%	29%	42%	26%	32%	33%	19%	
		bc	c		e								m		m			r		
		22%	43%	10%	55%	12%	26%	9%	58%	17%	32%	3%	40%	45%	37%	24%	40%	53%	12%	
Other business communications services	40	2	8	6	8	5	6	3	9	5	6	2	10	23	12	10	21	23	9	
	11%	5%	7%	10%	6%	9%	6%	7%	6%	11%	6%	8%	12%	15%	14%	11%	17%	15%	14%	
		4%	20%	15%	20%	12%	14%	7%	23%	12%	16%	5%	26%	57%	30%	25%	52%	57%	22%	

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

Table 5

**S6C. Have you used the following business communication services in the last 3 years? (MULTI CODE)**

Base : Those who do not currently use ISDN2/2e or ISDN30

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION												ANY IP s
	Total	1-49 *a	50-249 *b	250+ c	UNDER				ISDN2 *h	ISDN30 *i	ISDN2 ONLY *j	ISDN30 ONLY *k	BOTH ISDN *l	IP NOT ISDN m	ISDN2 & IP *n	ISDN30 & IP *o	ISDN & IP *p	IP SWITCHED	IP NOT SWITCHED		
					£1M *d	£1M- £20M e	£21M-£100M *f	£100M *g										ISDN	ISDN		
Significance Level: 95%																					
Unweighted total	100	28	27	44	23	36	15	20	-	-	-	-	-	100	-	-	-	-	-	100	
Effective Weighted Sample	97	28	27	44	22	35	15	20	-	-	-	-	-	97	-	-	-	-	-	97	
Total	116	37	35	44	29	44	16	20	-	-	-	-	-	116	-	-	-	-	-	116	
		32%	30%	38%	25%	38%	14%	17%	-%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	100%	
Analogue telephone line(s) i.e. fixed telephone lines that are not ISDN lines	25	11	6	8	3	13	3	3	-	-	-	-	-	25	-	-	-	-	-	25	
	21%	28%	19%	18%	10%	29%	18%	15%	-%	-%	-%	-%	-%	21%	-%	-%	-%	-%	-%	21%	
		42%	26%	32%	11%	51%	12%	12%	-%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	100%	
Mobile phones (including Smartphones)	13	7	4	2	5	5	-	1	-	-	-	-	-	13	-	-	-	-	-	13	
	11%	18%	11%	5%	18%	12%	-%	5%	-%	-%	-%	-%	-%	11%	-%	-%	-%	-%	-%	11%	
		54%	30%	16%	41%	41%	-%	8%	-%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	100%	
Cable modem or ADSL Fixed line broadband	34	17	6	10	9	9	5	6	-	-	-	-	-	34	-	-	-	-	-	34	
	29%	46%	19%	23%	32%	20%	28%	30%	-%	-%	-%	-%	-%	29%	-%	-%	-%	-%	-%	29%	
		51%	19%	30%	27%	26%	14%	18%	-%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	100%	
ISDN 2/2e channels or Business Highway	24	3	10	11	4	10	5	6	-	-	-	-	-	24	-	-	-	-	-	24	
	21%	7%	30%	25%	13%	22%	28%	30%	-%	-%	-%	-%	-%	21%	-%	-%	-%	-%	-%	21%	
		11%	43%	46%	16%	40%	19%	25%	-%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	100%	
ISDN 30 channels	25	4	10	11	5	10	4	6	-	-	-	-	-	25	-	-	-	-	-	25	
	22%	11%	30%	25%	18%	23%	26%	30%	-%	-%	-%	-%	-%	22%	-%	-%	-%	-%	-%	22%	
		16%	41%	43%	21%	39%	17%	23%	-%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	100%	
SDSL	24	4	8	12	3	9	4	7	-	-	-	-	-	24	-	-	-	-	-	24	
	20%	11%	22%	27%	9%	20%	24%	36%	-%	-%	-%	-%	-%	20%	-%	-%	-%	-%	-%	20%	
		17%	33%	50%	11%	37%	17%	31%	-%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	100%	
Leased lines	31	5	14	12	6	15	6	5	-	-	-	-	-	31	-	-	-	-	-	31	
	27%	14%	41%	27%	21%	34%	34%	25%	-%	-%	-%	-%	-%	27%	-%	-%	-%	-%	-%	27%	
		16%	46%	38%	19%	47%	18%	16%	-%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	100%	
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																					

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 5**

**S6C. Have you used the following business communication services in the last 3 years? (MULTI CODE)**

Base : Those who do not currently use ISDN2/2e or ISDN30

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION												
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30				IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP SWITCHED		IP NOT SWITCHED	ANY IP S
					£1M	£1M-£20M	£21M-£100M	OVER £100M		ONLY	BOTH	ONLY	BOTH					ISDN	ISDN		
Significance Level: 95%		*a	*b	c	*d	e	*f	*g	*h	*i	ONLY	*j	*k	*l	m	*n	*o	*p	*q	*r	
Unweighted total	100	28	27	44	23	36	15	20	-	-	-	-	-	-	100	-	-	-	-	-	100
Effective Weighted Sample	97	28	27	44	22	35	15	20	-	-	-	-	-	-	97	-	-	-	-	-	97
Total	116	37	35	44	29	44	16	20	-	-	-	-	-	-	116	-	-	-	-	-	116
		32%	30%	38%	25%	38%	14%	17%	-%	-%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	100%
Virtual Private Networks	17	7	3	8	5	8	2	1	-	-	-	-	-	-	17	-	-	-	-	-	17
	15%	18%	7%	18%	17%	18%	12%	5%	-%	-%	-%	-%	-%	-%	15%	-%	-%	-%	-%	-%	15%
		38%	15%	46%	29%	46%	12%	6%	-%	-%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	100%
Ethernet	20	8	6	5	8	8	2	1	-	-	-	-	-	-	20	-	-	-	-	-	20
	17%	22%	19%	11%	29%	19%	12%	5%	-%	-%	-%	-%	-%	-%	17%	-%	-%	-%	-%	-%	17%
		42%	33%	25%	42%	43%	10%	5%	-%	-%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	100%
Other business communications services	8	1	4	3	-	5	2	1	-	-	-	-	-	-	8	-	-	-	-	-	8
	7%	3%	11%	7%	-%	10%	14%	6%	-%	-%	-%	-%	-%	-%	7%	-%	-%	-%	-%	-%	7%
		15%	48%	37%	-%	56%	28%	16%	-%	-%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	100%
None of these	9	1	3	5	1	4	3	1	-	-	-	-	-	-	9	-	-	-	-	-	9
	8%	3%	7%	11%	4%	8%	18%	5%	-%	-%	-%	-%	-%	-%	8%	-%	-%	-%	-%	-%	8%
		14%	29%	56%	14%	41%	34%	11%	-%	-%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	100%
Don't know	2	-	-	2	-	1	-	1	-	-	-	-	-	-	2	-	-	-	-	-	2
	2%	-%	-%	5%	-%	2%	-%	5%	-%	-%	-%	-%	-%	-%	2%	-%	-%	-%	-%	-%	2%
		-%	-%	100%	-%	50%	-%	50%	-%	-%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	100%

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

Table 5

**S6C. Have you used the following business communication services in the last 3 years? (MULTI CODE)**

Base : Those who do not currently use ISDN2/2e or ISDN30

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		*a	*b	c	*d	*e	*f	*g	h	*i	*j	*k	*l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	100	-	-	100	-	-	-	-	78	22	-	-	-	-	44	56	57	36
Effective Weighted Sample	97	-	-	97	-	-	-	-	76	21	-	-	-	-	43	54	55	35
Total	116	-	-	116	-	-	-	-	91	25	-	-	-	-	54	63	69	39
		-%	-%	100%	-%	-%	-%	-%	79%	21%	-%	-%	-%	-%	46%	54%	59%	34%
Analogue telephone line(s) i.e. fixed telephone lines that are not ISDN lines	25	-	-	25	-	-	-	-	21	4	-	-	-	-	8	17	15	7
	21%	-%	-%	21%	-%	-%	-%	-%	23%	16%	-%	-%	-%	-%	15%	27%	22%	19%
		-%	-%	100%	-%	-%	-%	-%	84%	16%	-%	-%	-%	-%	33%	67%	60%	30%
Mobile phones (including Smartphones)	13	-	-	13	-	-	-	-	13	-	-	-	-	-	5	8	9	3
	11%	-%	-%	11%	-%	-%	-%	-%	14%	-%	-%	-%	-%	-%	10%	12%	13%	7%
		-%	-%	100%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	41%	59%	72%	20%
Cable modem or ADSL Fixed line broadband	34	-	-	34	-	-	-	-	31	2	-	-	-	-	18	15	23	5
	29%	-%	-%	29%	-%	-%	-%	-%	34%	10%	-%	-%	-%	-%	34%	24%	34%	14%
		-%	-%	100%	-%	-%	-%	-%	93%	7%	-%	-%	-%	-%	55%	45%	q	16%
ISDN 2/2e channels or Business Highway	24	-	-	24	-	-	-	-	21	3	-	-	-	-	11	13	11	13
	21%	-%	-%	21%	-%	-%	-%	-%	23%	12%	-%	-%	-%	-%	20%	21%	16%	33%
		-%	-%	100%	-%	-%	-%	-%	88%	12%	-%	-%	-%	-%	44%	56%	46%	54%
ISDN 30 channels	25	-	-	25	-	-	-	-	22	3	-	-	-	-	14	11	9	16
	22%	-%	-%	22%	-%	-%	-%	-%	25%	12%	-%	-%	-%	-%	26%	18%	12%	40%
		-%	-%	100%	-%	-%	-%	-%	88%	12%	-%	-%	-%	-%	56%	44%	p	61%
SDSL	24	-	-	24	-	-	-	-	18	6	-	-	-	-	13	11	13	11
	20%	-%	-%	20%	-%	-%	-%	-%	20%	22%	-%	-%	-%	-%	24%	18%	19%	27%
		-%	-%	100%	-%	-%	-%	-%	77%	23%	-%	-%	-%	-%	53%	47%	56%	44%
Leased lines	31	-	-	31	-	-	-	-	26	5	-	-	-	-	17	15	16	13
	27%	-%	-%	27%	-%	-%	-%	-%	29%	20%	-%	-%	-%	-%	31%	23%	23%	34%
		-%	-%	100%	-%	-%	-%	-%	84%	16%	-%	-%	-%	-%	53%	47%	51%	42%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 5

S6C. Have you used the following business communication services in the last 3 years? (MULTI CODE)

Base : Those who do not currently use ISDN2/2e or ISDN30

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		*a	*b	c	*d	*e	*f	*g	h	*i	*j	*k	*l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	100	-	-	100	-	-	-	-	78	22	-	-	-	-	44	56	57	36
Effective Weighted Sample	97	-	-	97	-	-	-	-	76	21	-	-	-	-	43	54	55	35
Total	116	-	-	116	-	-	-	-	91	25	-	-	-	-	54	63	69	39
		-%	-%	100%	-%	-%	-%	-%	79%	21%	-%	-%	-%	-%	46%	54%	59%	34%
Virtual Private Networks	17	-	-	17	-	-	-	-	14	3	-	-	-	-	12	5	11	4
	15%	-%	-%	15%	-%	-%	-%	-%	15%	13%	-%	-%	-%	-%	22%	9%	16%	10%
		-%	-%	100%	-%	-%	-%	-%	81%	19%	-%	-%	-%	-%	69%	31%	64%	23%
Ethernet	20	-	-	20	-	-	-	-	13	6	-	-	-	-	10	10	10	7
	17%	-%	-%	17%	-%	-%	-%	-%	15%	25%	-%	-%	-%	-%	19%	15%	15%	18%
		-%	-%	100%	-%	-%	-%	-%	68%	32%	-%	-%	-%	-%	51%	49%	52%	35%
Other business communications services	8	-	-	8	-	-	-	-	6	3	-	-	-	-	2	6	6	2
	7%	-%	-%	7%	-%	-%	-%	-%	6%	10%	-%	-%	-%	-%	4%	9%	8%	6%
		-%	-%	100%	-%	-%	-%	-%	68%	32%	-%	-%	-%	-%	28%	72%	72%	28%
None of these	9	-	-	9	-	-	-	-	5	4	-	-	-	-	3	6	7	2
	8%	-%	-%	8%	-%	-%	-%	-%	5%	17%	-%	-%	-%	-%	5%	10%	10%	5%
		-%	-%	100%	-%	-%	-%	-%	51%	49%	-%	-%	-%	-%	29%	71%	77%	23%
Don't know	2	-	-	2	-	-	-	-	2	-	-	-	-	-	-	2	-	1
	2%	-%	-%	2%	-%	-%	-%	-%	2%	-%	-%	-%	-%	-%	-%	3%	-%	3%
		-%	-%	100%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	-%	100%	-%	50%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 5

S6C. Have you used the following business communication services in the last 3 years? (MULTI CODE)

Base : Those who do not currently use ISDN2/2e or ISDN30

	Total	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
		NEVER			YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
		LAST YEAR	EVER	/DK															
		*a	*b	*c	*d	*e	*f	*g	*h	*i	*j	*k	*l	m	n	o	p	q	r
Significance Level: 95%																			
Unweighted total	100	-	-	-	-	-	-	-	-	-	-	-	28	71	31	40	57	69	31
Effective Weighted Sample	97	-	-	-	-	-	-	-	-	-	-	-	28	69	30	39	55	67	30
Total	116	-	-	-	-	-	-	-	-	-	-	-	33	83	35	49	64	79	38
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	28%	72%	30%	42%	55%	68%	32%
Analogue telephone line(s) i.e. fixed telephone lines that are not ISDN lines	25	-	-	-	-	-	-	-	-	-	-	-	10	20	2	14	11	17	8
	21%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	29%	24%	7%	28%	18%	22%	21%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	39%	81%	9%	55%	45%	69%	31%
Mobile phones (including Smartphones)	13	-	-	-	-	-	-	-	-	-	-	-	4	10	1	3	10	10	3
	11%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	12%	12%	4%	5%	16%	13%	8%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	30%	80%	10%	20%	80%	78%	22%
Cable modem or ADSL Fixed line broadband	34	-	-	-	-	-	-	-	-	-	-	-	9	23	8	15	16	26	7
	29%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	29%	27%	23%	30%	25%	34%	19%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	28%	68%	24%	44%	48%	79%	21%
ISDN 2/2e channels or Business Highway	24	-	-	-	-	-	-	-	-	-	-	-	11	17	13	13	11	18	6
	21%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	34%	21%	36%	26%	18%	23%	16%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	47%	73%	53%	53%	47%	75%	25%
ISDN 30 channels	25	-	-	-	-	-	-	-	-	-	-	-	14	20	14	12	13	16	10
	22%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	44%	23%	41%	25%	21%	20%	26%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	56%	77%	57%	48%	52%	62%	38%
SDSL	24	-	-	-	-	-	-	-	-	-	-	-	10	20	11	12	12	19	5
	20%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	30%	24%	32%	25%	18%	24%	14%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	42%	85%	47%	50%	50%	78%	22%
Leased lines	31	-	-	-	-	-	-	-	-	-	-	-	8	20	20	15	17	27	5
	27%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	25%	24%	56%	30%	26%	34%	12%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	26%	65%	m	47%	53%	r	15%
Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																			



# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 5

S6C. Have you used the following business communication services in the last 3 years? (MULTI CODE)

Base : Those who do not currently use ISDN2/2e or ISDN30

	Total	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
		LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%		*a	*b	*c	*d	*e	*f	*g	*h	*i	*j	*k	*l	m	n	o	p	q	r
Unweighted total	100	-	-	-	-	-	-	-	-	-	-	-	28	71	31	40	57	69	31
Effective Weighted Sample	97	-	-	-	-	-	-	-	-	-	-	-	28	69	30	39	55	67	30
Total	116	-	-	-	-	-	-	-	-	-	-	-	33	83	35	49	64	79	38
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	28%	72%	30%	42%	55%	68%	32%
Virtual Private Networks	17	-	-	-	-	-	-	-	-	-	-	-	1	13	5	8	8	8	10
	15%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	4%	15%	16%	17%	12%	10%	26%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	8%	74%	32%	48%	45%	44%	56%
Ethernet	20	-	-	-	-	-	-	-	-	-	-	-	6	15	5	9	11	11	9
	17%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	18%	18%	13%	18%	17%	14%	23%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	30%	76%	23%	46%	54%	56%	44%
Other business communications services	8	-	-	-	-	-	-	-	-	-	-	-	4	7	2	1	7	7	1
	7%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	12%	8%	7%	3%	11%	9%	3%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	47%	84%	28%	16%	84%	88%	12%
None of these	9	-	-	-	-	-	-	-	-	-	-	-	2	5	2	2	7	2	7
	8%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	7%	6%	7%	5%	10%	3%	18%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	25%	60%	26%	25%	75%	23%	77%
Don't know	2	-	-	-	-	-	-	-	-	-	-	-	-	-	1	1	-	1	1
	2%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	3%	2%	-%	1%	3%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	50%	50%	-%	50%	50%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

Table 6

## **S7. How long has your organisation been trading? (SINGLE CODE)**

Base : All respondents

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION													
	Total	UNDER			£1M- £20M	£21M-£100M			ISDN2	ISDN30		ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP	IP NOT	ANY	
		1-49	50-249	250+		£1M	£1M- £20M	£21M- £100M		£100M	SWITCHED								SWITCHED	IP		
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q	r	s		
Unweighted total	350	72	84	192	53	109	95	83	165	161	89	85	76	100	91	85	118	67	16	218		
Effective Weighted Sample	289	61	83	178	42	92	86	76	115	157	54	82	75	97	75	84	102	58	14	197		
Total	350	106	101	142	69	118	83	67	156	142	92	77	64	116	74	74	100	61	13	216		
		30%	29%	41%	20%	34%	24%	19%	45%	40%	26%	22%	18%	33%	21%	21%	28%	17%	4%	62%		
Less than 2 years	15	11	-	4	8	1	1	2	8	4	7	3	2	4	4	3	6	6	-	10		
	4%	11%	-%	3%	11%	1%	1%	2%	5%	3%	7%	3%	2%	3%	5%	4%	6%	10%	-%	5%		
		bc			efg													i				
		76%	-%	24%	52%	5%	5%	11%	55%	29%	45%	18%	11%	26%	26%	18%	39%	39%	-%	66%		
2-5 years	60	29	20	11	23	22	9	3	24	21	19	17	5	20	10	7	14	10	2	33		
	17%	27%	20%	8%	33%	19%	10%	5%	15%	15%	21%	21%	7%	17%	13%	10%	14%	16%	14%	15%		
		c	c		fg	g					l	lo										
		48%	33%	19%	38%	37%	14%	6%	40%	35%	32%	28%	8%	33%	17%	12%	23%	16%	3%	56%		
6-9 years	85	22	33	31	16	32	26	9	34	40	15	21	19	30	14	19	22	18	-	52		
	24%	20%	32%	22%	23%	27%	31%	13%	22%	28%	16%	28%	29%	26%	19%	26%	22%	30%	-%	24%		
					g	g																
		25%	38%	36%	19%	38%	31%	10%	39%	47%	18%	25%	22%	35%	17%	22%	26%	21%	-%	61%		
10-19 years	97	27	26	44	13	38	27	18	56	51	29	24	27	17	28	29	33	23	3	50		
	28%	26%	26%	31%	18%	32%	33%	28%	36%	36%	32%	31%	42%	15%	37%	39%	33%	39%	20%	23%		
					ms	ms	m	m	ms	ms	m	ms	ms	ms	ms	ms	m	ms				
		28%	27%	45%	13%	39%	28%	19%	58%	53%	30%	25%	28%	17%	28%	30%	34%	24%	3%	52%		
20+ years	93	17	23	53	10	25	20	35	34	25	22	13	12	46	19	16	25	3	9	70		
	27%	16%	22%	37%	14%	21%	25%	52%	22%	18%	24%	16%	19%	39%	25%	22%	25%	5%	66%	33%		
			ab					def	q	q	q	q	q	hiklnopq	q	q	q			hiklq		
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s		18%	24%	57%	11%	27%	22%	37%	37%	27%	24%	14%	13%	49%	20%	18%	27%	3%	9%	76%		

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 6

## S7. How long has your organisation been trading? (SINGLE CODE)

Base : All respondents

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN30			ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		ISDN2	ISDN30	IP														
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q
Unweighted total	350	123	94	133	88	53	83	54	154	64	160	57	140	20	150	200	139	193
Effective Weighted Sample	289	83	91	125	60	37	80	53	141	57	127	39	115	14	127	162	110	176
Total	350	124	85	141	82	57	73	49	158	58	153	56	130	22	160	190	162	171
		35%	24%	40%	24%	16%	21%	14%	45%	17%	44%	16%	37%	6%	46%	54%	46%	49%
Less than 2 years	15	8	3	4	1	7	2	2	10	-	7	4	7	1	15	-	12	3
	4%	7%	3%	3%	1%	13%	3%	5%	6%	-%	5%	6%	5%	4%	9%	-%	7%	2%
		55%	18%	26%	5%	50%	13%	16%	66%	-%	50%	24%	44%	5%	100%	-%	79%	21%
2-5 years	60	21	17	22	13	9	11	9	25	9	32	6	28	4	60	-	38	20
	17%	17%	20%	15%	16%	17%	15%	18%	16%	15%	21%	11%	21%	18%	37%	-%	23%	12%
		35%	28%	37%	21%	16%	18%	14%	42%	14%	53%	10%	46%	7%	100%	-%	63%	33%
6-9 years	85	26	25	34	21	11	20	17	30	23	39	12	36	3	85	-	36	48
	24%	21%	30%	24%	25%	19%	27%	35%	19%	39%	26%	21%	27%	16%	53%	-%	22%	28%
		30%	30%	40%	24%	13%	23%	20%	35%	26%	46%	14%	42%	4%	100%	-%	42%	56%
10-19 years	97	47	28	23	28	24	29	16	38	12	55	19	44	11	-	97	39	54
	28%	38%	33%	16%	34%	43%	40%	33%	24%	21%	36%	35%	34%	50%	-%	51%	24%	31%
		c	c			hi	hi								n			
		48%	29%	23%	29%	25%	30%	17%	39%	12%	57%	20%	45%	12%	-%	100%	40%	55%
20+ years	93	22	13	59	20	5	12	4	55	15	19	15	16	3	-	93	38	46
	27%	18%	15%	42%	24%	9%	16%	9%	35%	26%	13%	27%	13%	13%	-%	49%	23%	27%
			ab		g			efg		eg		j			n			
		23%	14%	63%	22%	5%	12%	5%	60%	16%	21%	16%	18%	3%	-%	100%	41%	50%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

Table 6

## **S7. How long has your organisation been trading? (SINGLE CODE)**

Base : All respondents

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	*k	l	m	n	o	p	q	r
Unweighted total	350	34	128	55	138	55	99	33	156	51	110	22	88	155	92	82	127	156	62
Effective Weighted Sample	289	25	107	37	107	39	72	25	121	41	81	15	77	143	85	74	116	140	57
Total	350	33	119	57	131	53	95	39	151	45	111	22	84	151	85	88	121	153	63
		9%	34%	16%	38%	15%	27%	11%	43%	13%	32%	6%	24%	43%	24%	25%	35%	44%	18%
Less than 2 years	15	2	6	3	7	*	2	3	7	1	2	3	4	7	1	9	1	9	1
	4%	5%	5%	5%	6%	1%	2%	8%	5%	2%	2%	14%	5%	4%	1%	10%	1%	6%	1%
		11%	42%	21%	50%	3%	13%	21%	47%	5%	13%	21%	26%	45%	5%	p 60%	5%	60%	5%
2-5 years	60	8	27	3	29	6	24	2	34	4	26	*	14	24	16	24	9	25	9
	17%	24%	22%	6%	22%	11%	25%	6%	23%	9%	23%	2%	17%	16%	19%	28%	7%	16%	14%
		c	c				g									p			
		13%	45%	5%	49%	10%	40%	4%	57%	7%	43%	1%	24%	40%	27%	41%	15%	41%	15%
6-9 years	85	6	38	7	38	9	25	8	43	7	29	4	22	36	22	21	30	34	18
	24%	18%	32%	13%	29%	18%	26%	21%	28%	15%	26%	19%	26%	24%	26%	24%	25%	22%	28%
			c																
		7%	45%	9%	45%	11%	29%	10%	50%	8%	34%	5%	25%	42%	26%	25%	35%	40%	21%
10-19 years	97	13	38	23	44	22	28	19	52	19	39	8	24	35	22	17	32	39	11
	28%	40%	32%	41%	34%	41%	30%	48%	35%	43%	35%	36%	29%	23%	26%	20%	27%	26%	18%
		14%	39%	24%	46%	22%	29%	19%	54%	20%	40%	8%	25%	36%	22%	18%	33%	40%	12%
20+ years	93	4	10	20	12	15	16	7	15	14	16	6	20	50	25	16	49	46	25
	27%	13%	8%	35%	9%	29%	17%	17%	10%	31%	14%	29%	24%	33%	29%	19%	40%	30%	39%
			b			d				h						o			
		5%	11%	22%	13%	17%	17%	7%	16%	15%	17%	7%	22%	54%	27%	18%	53%	49%	26%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 7**

**S8. How many sites or offices does your organisation operate from in the UK? (SINGLE CODE)**

Base : All respondents

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											IP SWITCHED		IP NOT SWITCHED		ANY IP
	Total	1-49 a	50-249 b	250+ c	UNDER				ISDN2 h	ISDN30 i	ISDN30		BOTH ISDN l	IP NOT ISDN m	ISDN2 & IP n	ISDN30 & IP o	ISDN & IP p	ISDN q	ISDN r					
					£1M d	£1M-£20M e	£21M-£100M f	OVER £100M g			ONLY j	ONLY k												
Significance Level: 95%																								
Unweighted total	350	72	84	192	53	109	95	83	165	161	89	85	76	100	91	85	118	67	16	218				
Effective Weighted Sample	289	61	83	178	42	92	86	76	115	157	54	82	75	97	75	84	102	58	14	197				
Total	350	106	101	142	69	118	83	67	156	142	92	77	64	116	74	74	100	61	13	216				
		30%	29%	41%	20%	34%	24%	19%	45%	40%	26%	22%	18%	33%	21%	21%	28%	17%	4%	62%				
1	77	53	14	9	30	31	7	5	36	13	30	7	6	34	6	4	7	4	1	41				
	22%	50% bc	14% c	7%	43% efg	26% fg	8%	7%	23% iklnopq	9%	33% iklnopqs	9%	10% iklnopq	29%	8%	5%	7%	7%	8%	19%				
		69%	19%	12%	39%	40%	9%	6%	47%	17%	39%	9%	8%	44%	8%	5%	9%	5%	1%	53%				
2-3	101	28	50	23	22	31	35	9	37	41	25	29	12	35	13	20	24	18	3	60				
	29%	26%	50% ac	16%	33% g	26% g	42% eg	13%	24%	29%	28%	37% hln	19%	30%	18%	26%	25%	30%	20%	28%				
		27%	50%	23%	22%	31%	34%	8%	37%	40%	25%	29%	12%	35%	13%	19%	24%	18%	3%	59%				
4-5	48	11	13	25	6	15	11	15	22	23	14	14	9	11	15	13	20	13	1	31				
	14%	10%	13%	17%	9%	13%	14%	23%	14%	16%	15%	18%	14%	10%	20%	17%	20%	22% m	9%	14%				
		22%	27%	51%	13%	31%	24%	32%	47%	48%	28%	29%	19%	24%	31%	27%	41%	28%	3%	65%				
6-10	32	5	6	22	3	15	8	7	15	13	6	3	10	14	12	8	13	8	2	26				
	9%	5%	5%	15% ab	5%	12%	10%	10%	10%	9%	6%	5%	15% k	12%	16% k	11%	13%	13%	14%	12%				
		16%	17%	67%	10%	45%	24%	20%	47%	40%	18%	11%	30%	42%	37%	24%	39%	24%	6%	81%				
More than 10	68	6	11	51	2	18	19	26	35	40	11	17	23	16	24	23	27	14	5	44				
	19%	5%	11%	36% ab	3%	15% d	23% d	39% def	22%	28% jm	12%	21%	37% hjkms	14%	32% jms	31% jm	28% jm	24%	41%	20%				
		8%	16%	76%	3%	26%	28%	38%	51%	59%	17%	24%	35%	24%	35%	34%	40%	21%	8%	65%				
Don't know	23	4	7	12	5	9	3	6	10	11	6	7	4	6	4	7	8	2	1	14				
	7%	3%	7%	8%	7%	7%	4%	9%	6%	8%	6%	9%	6%	5%	5%	10%	8%	4%	8%	7%				
		15%	32%	52%	22%	38%	14%	26%	42%	49%	25%	32%	17%	26%	17%	32%	36%	10%	4%	62%				
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																								

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 7**

**S8. How many sites or offices does your organisation operate from in the UK? (SINGLE CODE)**

Base : All respondents

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q
Significance Level: 95%																		
Unweighted total	350	123	94	133	88	53	83	54	154	64	160	57	140	20	150	200	139	193
Effective Weighted Sample	289	83	91	125	60	37	80	53	141	57	127	39	115	14	127	162	110	176
Total	350	124	85	141	82	57	73	49	158	58	153	56	130	22	160	190	162	171
		35%	24%	40%	24%	16%	21%	14%	45%	17%	44%	16%	37%	6%	46%	54%	46%	49%
1	77	34	7	36	16	19	8	4	33	8	25	16	19	6	35	42	57	17
	22%	28%	8%	25%	19%	33%	11%	8%	21%	14%	16%	29%	14%	28%	22%	22%	35%	10%
		b		b		fgi			g								q	
		45%	9%	46%	20%	24%	10%	5%	42%	11%	32%	21%	24%	8%	45%	55%	74%	22%
2-3	101	31	32	39	25	11	27	11	47	13	47	16	43	4	55	47	51	45
	29%	25%	37%	27%	30%	19%	36%	23%	30%	22%	31%	28%	33%	18%	34%	25%	31%	27%
		30%	31%	38%	25%	11%	26%	11%	46%	13%	46%	15%	42%	4%	54%	46%	50%	45%
4-5	48	16	16	16	8	10	13	7	20	11	26	6	21	4	24	24	19	27
	14%	13%	19%	12%	10%	17%	18%	14%	12%	20%	17%	10%	16%	20%	15%	12%	12%	16%
		33%	33%	34%	18%	21%	27%	14%	41%	24%	54%	12%	44%	9%	51%	49%	41%	57%
6-10	32	12	5	16	7	7	5	7	16	10	14	3	12	2	16	16	8	22
	9%	10%	5%	11%	9%	12%	7%	14%	10%	18%	9%	6%	9%	7%	10%	9%	5%	13%
																	p	
		38%	14%	48%	22%	21%	16%	22%	49%	32%	42%	10%	37%	5%	50%	50%	25%	69%
More than 10	68	23	20	24	21	8	18	14	32	11	37	7	31	6	18	50	18	49
	19%	19%	24%	17%	25%	14%	25%	29%	21%	20%	24%	12%	24%	26%	11%	26%	11%	29%
																n		
		34%	30%	36%	31%	12%	27%	21%	48%	17%	54%	10%	46%	8%	27%	73%	26%	72%
Don't know	23	7	6	10	5	2	2	6	10	4	5	8	4	*	11	12	9	10
	7%	6%	7%	7%	6%	4%	2%	11%	6%	7%	3%	14%	3%	2%	7%	6%	5%	6%
								f				j						
		30%	25%	45%	23%	10%	8%	24%	43%	18%	20%	35%	18%	2%	50%	50%	38%	43%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 7

S8. How many sites or offices does your organisation operate from in the UK? (SINGLE CODE)

Base : All respondents

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	*k	l	m	n	o	p	q	r
Unweighted total	350	34	128	55	138	55	99	33	156	51	110	22	88	155	92	82	127	156	62
Effective Weighted Sample	289	25	107	37	107	39	72	25	121	41	81	15	77	143	85	74	116	140	57
Total	350	33	119	57	131	53	95	39	151	45	111	22	84	151	85	88	121	153	63
		9%	34%	16%	38%	15%	27%	11%	43%	13%	32%	6%	24%	43%	24%	25%	35%	44%	18%
1	77	1	17	23	19	15	26	11	28	5	26	11	12	27	8	22	18	26	15
	22%	3%	14%	41%	14%	29%	27%	27%	18%	12%	23%	47%	14%	18%	10%	25%	15%	17%	23%
				ab		d													
		1%	22%	30%	24%	20%	33%	14%	36%	7%	33%	14%	15%	36%	11%	28%	24%	34%	19%
2-3	101	11	40	12	40	17	29	13	47	15	39	2	20	49	18	26	32	43	17
	29%	33%	34%	21%	30%	32%	31%	32%	31%	33%	35%	10%	24%	32%	21%	30%	26%	28%	27%
		11%	39%	12%	39%	17%	29%	12%	46%	15%	39%	2%	20%	48%	18%	26%	32%	42%	17%
4-5	48	4	23	5	21	5	9	7	25	4	12	5	12	22	17	17	14	26	5
	14%	11%	19%	9%	16%	9%	10%	19%	17%	10%	11%	22%	14%	14%	20%	19%	12%	17%	8%
		7%	47%	11%	43%	10%	20%	16%	53%	9%	25%	10%	25%	46%	35%	35%	30%	55%	10%
6-10	32	3	10	4	12	3	5	1	14	3	5	1	11	15	12	7	18	21	6
	9%	10%	8%	7%	9%	5%	5%	3%	9%	6%	4%	6%	13%	10%	15%	7%	15%	13%	9%
		10%	30%	12%	37%	8%	16%	3%	44%	8%	14%	4%	35%	46%	38%	20%	56%	63%	18%
More than 10	68	13	21	10	31	11	19	5	30	13	21	3	23	29	24	14	29	30	13
	19%	40%	17%	17%	23%	20%	20%	12%	20%	29%	19%	12%	27%	19%	29%	16%	24%	20%	21%
		bc																	
		20%	30%	14%	45%	16%	28%	7%	44%	19%	31%	4%	34%	43%	36%	21%	42%	45%	20%
Don't know	23	1	9	3	9	3	7	2	7	5	8	*	6	9	5	3	9	7	7
	7%	3%	7%	5%	7%	5%	7%	6%	5%	10%	8%	2%	7%	6%	6%	3%	8%	4%	12%
		4%	39%	13%	41%	12%	29%	10%	31%	20%	37%	2%	26%	38%	21%	11%	40%	30%	32%
Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																			

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 8**

**S8A. Does your involvement with purchasing decisions regarding your organisation's telecoms and other communications services extend to all sites, some sites or just the site you operate out of? (SINGLE CODE)**

Base : Those in organisations with more than one site or office in the UK

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											IP SWITCHED		IP NOT SWITCHED		ANY
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN30			IP NOT ISDN2	ISDN2 & IP	ISDN30 & IP	ISDN	ISDN						
					£1M	£1M-£20M	£21M-£100M	OVER £100M			ONLY	ONLY	BOTH											
Significance Level: 95%		a	b	c	*d	e	f	g	h	i	j	k	l	m	n	o	p	q	*r	s				
Unweighted total	264	36	67	161	27	79	84	68	127	133	63	69	64	68	80	72	101	62	14	169				
Effective Weighted Sample	229	31	66	150	22	72	77	63	97	131	40	68	63	67	71	71	91	57	12	156				
Total	250	49	80	121	34	79	73	56	110	117	56	63	54	77	64	63	84	54	11	161				
		20%	32%	48%	14%	32%	29%	23%	44%	47%	22%	25%	22%	31%	26%	25%	34%	22%	4%	64%				
All sites	202	37	67	98	27	54	66	49	93	107	42	56	51	53	60	63	80	53	9	133				
	81%	76%	84%	81%	79%	69%	90%	87%	85%	91%	76%	89%	94%	70%	93%	99%	95%	97%	84%	83%				
							e	e	m	jms		m	jms		jms	hijkms	hjms	hjms		m				
		18%	33%	49%	13%	27%	33%	24%	46%	53%	21%	28%	25%	26%	29%	31%	39%	26%	5%	66%				
Some sites	39	11	13	16	7	20	5	6	15	10	12	7	3	17	4	1	4	1	1	21				
	16%	21%	16%	13%	21%	26%	7%	10%	14%	9%	21%	11%	6%	22%	6%	1%	5%	3%	13%	13%				
						fg			opq	o	ilnopq	o		ilnopq						opq				
		27%	33%	41%	18%	51%	13%	14%	39%	27%	30%	18%	9%	43%	10%	2%	10%	4%	4%	54%				
Just the site operating from	8	1	-	7	-	4	2	2	2	-	2	-	-	6	*	-	*	-	*	7				
	3%	3%	-%	5%	-%	5%	3%	4%	2%	-%	3%	-%	-%	8%	1%	-%	*%	-%	4%	4%				
														hiklnopq						i				
		16%	-%	84%	-%	52%	23%	25%	21%	-%	21%	-%	-%	79%	5%	-%	5%	-%	5%	84%				
Columns Tested:	a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																							



# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 8**

**S8A. Does your involvement with purchasing decisions regarding your organisation's telecoms and other communications services extend to all sites, some sites or just the site you operate out of? (SINGLE CODE)**

Base : Those in organisations with more than one site or office in the UK

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q
Unweighted total	264	92	80	92	72	37	72	44	118	51	136	36	119	17	112	152	91	164
Effective Weighted Sample	229	67	78	87	54	29	71	43	111	46	115	27	100	15	97	133	76	149
Total	250	82	73	95	61	36	63	39	115	46	123	32	107	16	113	136	96	144
		33%	29%	38%	25%	14%	25%	16%	46%	18%	49%	13%	43%	6%	45%	55%	39%	58%
All sites	202	67	65	70	50	32	58	35	99	34	106	26	95	11	91	111	76	122
	81%	82%	89%	74%	81%	89%	92%	88%	86%	74%	86%	82%	88%	73%	80%	82%	79%	85%
		33%	32%	35%	25%	16%	29%	17%	49%	17%	52%	13%	47%	6%	45%	55%	38%	60%
Some sites	39	13	8	18	10	4	5	5	11	10	16	5	12	4	21	18	15	21
	16%	16%	11%	19%	17%	10%	8%	12%	10%	21%	13%	17%	11%	24%	18%	13%	16%	15%
		33%	20%	46%	26%	9%	13%	12%	29%	24%	40%	14%	30%	10%	53%	47%	38%	53%
Just the site operating from	8	2	-	6	1	*	-	-	4	2	1	*	1	*	1	7	5	1
	3%	2%	-%	7%	2%	1%	-%	-%	4%	5%	1%	1%	1%	3%	1%	5%	5%	1%
		21%	-%	79%	16%	5%	-%	-%	54%	30%	16%	5%	11%	5%	16%	84%	64%	18%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 8**

**S8A. Does your involvement with purchasing decisions regarding your organisation's telecoms and other communications services extend to all sites, some sites or just the site you operate out of? (SINGLE CODE)**

Base : Those in organisations with more than one site or office in the UK

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
								UP TO 3 YEARS	4+ YEARS						UP TO 2 YEARS	OVER 2 YEARS			
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK			YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX			YES	NO/DK
Significance Level: 95%	a	b	c	d	e	f	*g	h	i	j	*k	l	m	n	o	p	q	r	
Unweighted total	264	31	104	37	113	41	71	24	128	40	80	15	73	123	80	63	102	127	42
Effective Weighted Sample	229	23	94	27	96	31	56	19	107	31	62	13	67	114	73	59	94	118	38
Total	250	31	93	31	103	35	63	26	116	35	77	11	66	115	72	63	94	120	41
		12%	37%	12%	41%	14%	25%	10%	47%	14%	31%	5%	27%	46%	29%	25%	37%	48%	16%
All sites	202	27	81	25	91	28	48	21	99	30	60	9	60	100	63	57	75	106	27
	81%	85%	87%	81%	88%	80%	77%	80%	85%	85%	77%	82%	91%	87%	87%	89%	81%	88%	67%
		13%	40%	12%	45%	14%	24%	10%	49%	15%	30%	5%	30%	49%	31%	28%	37%	52%	14%
Some sites	39	5	12	5	12	7	13	5	16	5	17	1	5	9	8	6	13	11	10
	16%	15%	13%	15%	11%	19%	21%	18%	14%	15%	22%	11%	8%	8%	11%	9%	14%	10%	23%
		11%	30%	12%	30%	17%	34%	12%	40%	13%	43%	3%	13%	23%	21%	15%	34%	29%	24%
Just the site operating from	8	-	*	1	1	*	1	*	2	-	*	1	1	6	1	1	5	3	4
	3%	-%	*%	4%	1%	1%	1%	2%	1%	-%	1%	7%	2%	5%	1%	2%	5%	2%	10%
		-%	5%	16%	11%	5%	11%	5%	21%	-%	5%	11%	16%	72%	13%	13%	59%	34%	50%
Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																			

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

Table 9

**S10. To the best of your knowledge what is the annual UK turnover for your company? (SINGLE CODE)**

Base : All respondents

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											IP SWITCHED		IP NOT SWITCHED		ANY IP
	Total	UNDER			£1M	£1M-£20M	£21M-£100M		ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN2		ISDN30 & IP	ISDN & IP	ISDN	ISDN					
		1-49	50-249	250+			0M	£100M						& IP	& IP									
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q	r	s				
Unweighted total	350	72	84	192	53	109	95	83	165	161	89	85	76	100	91	85	118	67	16	218				
Effective Weighted Sample	289	61	83	178	42	92	86	76	115	157	54	82	75	97	75	84	102	58	14	197				
Total	350	106	101	142	69	118	83	67	156	142	92	77	64	116	74	74	100	61	13	216				
		30%	29%	41%	20%	34%	24%	19%	45%	40%	26%	22%	18%	33%	21%	21%	28%	17%	4%	62%				
Less than 1/2 £250,000	18	18	-	-	18	-	-	-	9	2	9	2	-	7	1	1	3	1	1	9				
	5%	17%	-%	-%	27%	-%	-%	-%	6%	2%	10%	3%	-%	6%	2%	2%	3%	2%	11%	4%				
		bc			efg				l		ilo			l										
		100%	-%	-%	100%	-%	-%	-%	50%	12%	50%	12%	-%	38%	8%	6%	14%	6%	8%	52%				
£250,000 - £499,999	18	14	2	1	18	-	-	-	9	4	9	4	-	4	3	-	3	3	-	7				
	5%	13%	2%	1%	26%	-%	-%	-%	6%	3%	10%	5%	-%	4%	4%	-%	3%	5%	-%	3%				
		bc			efg				lo		ilos			o				o						
		80%	13%	7%	100%	-%	-%	-%	54%	22%	54%	22%	-%	24%	18%	-%	18%	18%	-%	41%				
£500,000 - £999,999	33	20	6	7	33	-	-	-	10	10	6	5	5	17	4	4	4	4	-	21				
	9%	19%	6%	5%	48%	-%	-%	-%	7%	7%	6%	6%	7%	15%	5%	5%	4%	6%	-%	10%				
		bc			efg									hinop										
		62%	18%	20%	100%	-%	-%	-%	32%	29%	18%	15%	14%	53%	11%	11%	11%	11%	-%	64%				
£1 million - £2.5 million	49	24	17	8	-	49	-	-	20	17	17	13	3	15	3	7	8	7	-	24				
	14%	22%	17%	6%	-%	41%	-%	-%	13%	12%	19%	17%	5%	13%	5%	9%	8%	12%	-%	11%				
		c	c			dfg					ln	ln												
		49%	35%	16%	-%	100%	-%	-%	41%	34%	35%	27%	7%	31%	7%	14%	17%	15%	-%	48%				
£2.5 million - £20 million	69	15	32	22	-	69	-	-	25	22	19	16	6	28	9	9	15	9	2	44				
	20%	14%	32%	16%	-%	59%	-%	-%	16%	16%	21%	21%	9%	24%	12%	12%	15%	14%	19%	20%				
			ac			dfg						l		lno										
		22%	46%	32%	-%	100%	-%	-%	36%	32%	27%	23%	8%	41%	13%	13%	22%	12%	4%	63%				
£21 million - £50 million	46	-	24	21	-	-	46	-	23	26	9	12	14	10	10	13	14	10	-	24				
	13%	-%	24%	15%	-%	-%	55%	-%	15%	18%	10%	15%	22%	9%	14%	17%	14%	17%	-%	11%				
			a	a			deg			m			ms											
		-%	53%	47%	-%	-%	100%	-%	51%	57%	20%	26%	31%	22%	22%	28%	31%	22%	-%	53%				
£51 million - £100 million	38	1	16	21	-	-	38	-	20	24	8	12	12	6	14	17	21	12	-	27				
	11%	1%	16%	15%	-%	-%	45%	-%	13%	17%	8%	15%	19%	5%	19%	23%	21%	19%	-%	12%				
			a	a			deg			m		m	m		m	hjms	jm	m						
		3%	42%	56%	-%	-%	100%	-%	52%	63%	20%	32%	32%	17%	37%	46%	55%	31%	-%	71%				
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																								

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

Table 9

**S10. To the best of your knowledge what is the annual UK turnover for your company? (SINGLE CODE)**

Base : All respondents

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											ANY IP
	Total	1-49	50-249	250+	UNDER £1M	£1M- £20M	£21M-£10 0M	OVER £100M	ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP SWITCHED ISDN	IP NOT SWITCHED ISDN	
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q	*r	s
Unweighted total	350	72	84	192	53	109	95	83	165	161	89	85	76	100	91	85	118	67	16	218
Effective Weighted Sample	289	61	83	178	42	92	86	76	115	157	54	82	75	97	75	84	102	58	14	197
Total	350	106	101	142	69	118	83	67	156	142	92	77	64	116	74	74	100	61	13	216
		30%	29%	41%	20%	34%	24%	19%	45%	40%	26%	22%	18%	33%	21%	21%	28%	17%	4%	62%
£101 million - £500 million	51	5	3	43	-	-	-	51	29	29	9	10	20	12	25	20	26	13	8	39
	15%	5%	3%	30%	-%	-%	-%	76%	19%	21%	10%	12%	31%	11%	33%	27%	27%	22%	58%	18%
				ab				def		m			jkms		hijkms	jkm	jkm			
		10%	5%	85%	-%	-%	-%	100%	57%	58%	18%	19%	39%	24%	49%	39%	52%	26%	15%	76%
Over £500 million	16	-	-	16	-	-	-	16	6	6	2	2	4	8	4	4	5	1	2	13
	5%	-%	-%	11%	-%	-%	-%	24%	4%	4%	2%	3%	6%	7%	6%	5%	5%	2%	12%	6%
				ab				def												
		-%	-%	100%	-%	-%	-%	100%	35%	40%	10%	15%	25%	50%	28%	25%	33%	8%	10%	83%
Don't know	13	8	1	3	-	-	-	-	4	2	4	1	1	7	*	-	*	*	-	8
	4%	8%	1%	2%	-%	-%	-%	-%	3%	1%	4%	1%	1%	6%	1%	-%	*%	1%	-%	4%
		c												inop						
		66%	10%	24%	-%	-%	-%	-%	34%	13%	28%	6%	6%	59%	3%	-%	3%	3%	-%	63%
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																				

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 9**

**S10. To the best of your knowledge what is the annual UK turnover for your company? (SINGLE CODE)**

Base : All respondents

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q
Unweighted total	350	123	94	133	88	53	83	54	154	64	160	57	140	20	150	200	139	193
Effective Weighted Sample	289	83	91	125	60	37	80	53	141	57	127	39	115	14	127	162	110	176
Total	350	124	85	141	82	57	73	49	158	58	153	56	130	22	160	190	162	171
		35%	24%	40%	24%	16%	21%	14%	45%	17%	44%	16%	37%	6%	46%	54%	46%	49%
Less than £1/250,000	18	9	2	7	1	8	1	1	7	3	5	6	4	1	12	6	17	-
	5%	7%	3%	5%	2%	13%	2%	2%	4%	5%	3%	11%	3%	6%	8%	3%	11%	-%
		50%	12%	38%	8%	42%	6%	6%	36%	16%	28%	34%	20%	8%	67%	33%	94%	-%
£250,000 - £499,999	18	9	4	4	6	3	1	3	6	1	10	3	9	1	14	4	15	1
	5%	8%	5%	3%	8%	6%	2%	6%	4%	2%	7%	5%	7%	4%	9%	2%	9%	1%
		54%	22%	24%	36%	18%	6%	16%	34%	7%	60%	17%	54%	6%	80%	20%	86%	8%
£500,000 - £999,999	33	9	7	17	5	6	4	6	17	4	5	11	5	-	20	13	27	6
	9%	7%	8%	12%	6%	10%	5%	12%	11%	7%	3%	19%	4%	-%	13%	7%	16%	4%
		26%	21%	53%	15%	17%	12%	17%	53%	12%	15%	32%	15%	-%	61%	39%	81%	19%
£1 million - £2.5 million	49	20	12	16	10	11	6	10	19	4	26	7	13	13	20	28	34	12
	14%	16%	15%	12%	12%	19%	8%	20%	12%	8%	17%	12%	10%	60%	13%	15%	21%	7%
		41%	25%	33%	20%	22%	12%	20%	39%	9%	53%	13%	26%	27%	42%	58%	69%	25%
£2.5 million - £20 million	69	21	17	32	12	11	10	9	23	20	25	12	25	1	35	35	33	34
	20%	17%	20%	22%	15%	19%	14%	19%	15%	35%	17%	22%	19%	4%	22%	18%	21%	20%
		30%	25%	45%	18%	16%	15%	14%	34%	29%	37%	18%	35%	1%	50%	50%	48%	49%
£21 million - £50 million	46	18	14	14	12	8	15	8	16	8	23	9	21	2	22	23	9	37
	13%	14%	16%	10%	15%	15%	20%	16%	10%	14%	15%	15%	16%	9%	14%	12%	6%	21%
		39%	30%	31%	27%	18%	33%	17%	35%	18%	50%	19%	46%	4%	49%	51%	20%	80%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

Table 9

**S10. To the best of your knowledge what is the annual UK turnover for your company? (SINGLE CODE)**

Base : All respondents

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30		ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	*m	n	o	p	q
Unweighted total	350	123	94	133	88	53	83	54	154	64	160	57	140	20	150	200	139	193
Effective Weighted Sample	289	83	91	125	60	37	80	53	141	57	127	39	115	14	127	162	110	176
Total	350	124	85	141	82	57	73	49	158	58	153	56	130	22	160	190	162	171
		35%	24%	40%	24%	16%	21%	14%	45%	17%	44%	16%	37%	6%	46%	54%	46%	49%
£51 million - £100 million	38	11	12	15	11	4	14	4	22	5	20	2	20	1	13	24	11	24
	11%	9%	14%	11%	13%	6%	19%	9%	14%	9%	13%	4%	15%	4%	8%	13%	7%	14%
		28%	32%	40%	29%	10%	36%	11%	58%	13%	54%	6%	52%	2%	35%	65%	29%	63%
£101 million - £500 million	51	20	13	18	18	6	18	7	31	8	29	4	26	3	12	39	7	41
	15%	16%	15%	13%	22%	10%	24%	15%	20%	13%	19%	7%	20%	13%	8%	20%	4%	24%
		40%	25%	35%	36%	11%	34%	14%	61%	15%	57%	8%	51%	6%	24%	76%	14%	80%
Over £500 million	16	2	3	10	3	-	3	1	9	5	4	1	4	-	1	15	2	14
	5%	2%	4%	7%	4%	-%	4%	2%	5%	8%	3%	2%	3%	-%	1%	8%	1%	8%
		15%	20%	65%	20%	-%	20%	5%	54%	29%	27%	8%	27%	-%	9%	91%	15%	85%
Don't know	13	4	1	7	3	1	2	-	7	*	4	1	4	-	9	4	7	3
	4%	4%	1%	5%	4%	2%	2%	-%	5%	1%	3%	1%	3%	-%	5%	2%	5%	2%
		34%	6%	59%	25%	10%	13%	-%	59%	3%	34%	6%	34%	-%	69%	31%	59%	20%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 9**

**S10. To the best of your knowledge what is the annual UK turnover for your company? (SINGLE CODE)**

Base : All respondents

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%	a	b	c	d	e	f	g	h	i	j	*k	l	m	n	o	p	q	r	
Unweighted total	350	34	128	55	138	55	99	33	156	51	110	22	88	155	92	82	127	156	62
Effective Weighted Sample	289	25	107	37	107	39	72	25	121	41	81	15	77	143	85	74	116	140	57
Total	350	33	119	57	131	53	95	39	151	45	111	22	84	151	85	88	121	153	63
		9%	34%	16%	38%	15%	27%	11%	43%	13%	32%	6%	24%	43%	24%	25%	35%	44%	18%
Less than £1/250,000	18	-	4	8	1	6	1	8	4	5	6	3	-	9	-	5	4	5	4
	5%	-%	3%	13%	1%	11%	1%	20%	2%	10%	5%	14%	-%	6%	-%	6%	3%	3%	7%
		-%	20%	42%	6%	33%	6%	42%	20%	25%	31%	17%	-%	52%	-%	29%	23%	29%	23%
£250,000 - £499,999	18	3	8	3	10	4	8	3	10	2	8	3	3	4	-	4	3	3	4
	5%	9%	7%	4%	8%	7%	8%	6%	7%	5%	7%	11%	4%	3%	-%	5%	2%	2%	7%
		18%	44%	14%	56%	20%	44%	14%	56%	14%	44%	14%	18%	24%	-%	25%	16%	18%	24%
£500,000 - £999,999	33	2	8	6	11	4	10	2	9	7	12	-	5	15	10	13	9	14	8
	9%	6%	6%	10%	9%	8%	10%	6%	6%	15%	11%	-%	6%	10%	12%	14%	7%	9%	12%
		6%	23%	17%	35%	12%	29%	7%	27%	20%	36%	-%	15%	46%	31%	38%	26%	41%	23%
£1 million - £2.5 million	49	3	22	7	21	10	18	7	27	3	21	4	9	13	7	16	7	11	13
	14%	10%	18%	13%	16%	19%	19%	19%	18%	7%	19%	17%	11%	9%	9%	18%	6%	7%	20%
		7%	45%	15%	43%	21%	37%	15%	54%	6%	44%	8%	19%	27%	15%	33%	15%	23%	26%
£2.5 million - £20 million	69	3	21	14	20	12	17	8	28	7	21	5	13	29	16	20	22	30	13
	20%	10%	18%	24%	16%	23%	18%	22%	19%	15%	19%	20%	15%	19%	18%	23%	18%	20%	21%
		5%	30%	20%	29%	17%	25%	12%	40%	10%	31%	7%	18%	41%	23%	30%	32%	44%	19%
£21 million - £50 million	46	*	27	4	21	4	14	7	26	5	18	3	13	16	10	7	18	22	2
	13%	1%	23%	7%	16%	8%	15%	19%	17%	12%	16%	15%	15%	11%	11%	7%	15%	15%	3%
		1%	60%	8%	46%	10%	31%	16%	57%	12%	39%	8%	28%	36%	21%	14%	39%	49%	4%
£51 million - £100 million	38	8	13	2	20	2	10	1	19	3	10	*	14	24	12	5	21	20	7
	11%	25%	11%	3%	16%	3%	10%	3%	13%	8%	9%	2%	16%	16%	15%	5%	18%	13%	11%
		c		e												o			
		22%	34%	4%	54%	4%	25%	3%	50%	9%	28%	1%	36%	64%	33%	12%	57%	53%	18%
Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																			

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 9**

**S10. To the best of your knowledge what is the annual UK turnover for your company? (SINGLE CODE)**

Base : All respondents

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
								UP TO 3 YEARS	4+ YEARS						UP TO 2 YEARS	OVER 2 YEARS			
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK			YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX			YES	NO/DK
Significance Level: 95%	a	b	c	d	e	f	g	h	i	j	*k	l	m	n	o	p	q	r	
Unweighted total	350	34	128	55	138	55	99	33	156	51	110	22	88	155	92	82	127	156	62
Effective Weighted Sample	289	25	107	37	107	39	72	25	121	41	81	15	77	143	85	74	116	140	57
Total	350	33	119	57	131	53	95	39	151	45	111	22	84	151	85	88	121	153	63
		9%	34%	16%	38%	15%	27%	11%	43%	13%	32%	6%	24%	43%	24%	25%	35%	44%	18%
£101 million - £500 million	51	8	15	11	20	8	10	2	21	11	10	3	23	26	22	10	27	31	8
	15%	23%	12%	19%	16%	16%	11%	6%	14%	24%	9%	13%	28%	17%	25%	11%	23%	20%	12%
		15%	29%	22%	40%	16%	20%	4%	41%	21%	19%	6%	46%	51%	42%	19%	54%	61%	15%
Over £500 million	16	2	1	3	2	1	3	-	4	1	2	1	4	9	7	3	10	10	3
	5%	6%	1%	5%	2%	2%	3%	-%	2%	3%	2%	4%	5%	6%	8%	3%	8%	7%	5%
		13%	5%	18%	15%	8%	17%	-%	23%	8%	13%	5%	25%	54%	41%	17%	60%	62%	20%
Don't know	13	3	1	1	4	2	5	-	4	1	4	1	-	5	2	5	-	6	2
	4%	9%	1%	1%	3%	3%	5%	-%	3%	2%	4%	4%	-%	4%	2%	6%	-%	4%	3%
		b													p				
		25%	10%	6%	28%	13%	37%	-%	34%	6%	31%	6%	-%	42%	13%	42%	-%	49%	13%
Columns Tested:	a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																		

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r



# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 10

S11. Approximately how much does your organisation spend annually on business communications services within the UK across all sites? (SINGLE CODE)

Base : All respondents

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											IP SWITCHED		IP NOT SWITCHED		ANY IP
	Total	UNDER			£1M-£20M	£21M-£100M			ISDN2	ISDN30		ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN2 & IP	ISDN30 & IP	ISDN & IP	ISDN	ISDN					
		1-49	50-249	250+		£1M	£1M-£20M	£21M-£100M		£100M	ISDN30 ONLY									ISDN30 ONLY				
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q	r	s				
Unweighted total	350	72	84	192	53	109	95	83	165	161	89	85	76	100	91	85	118	67	16	218				
Effective Weighted Sample	289	61	83	178	42	92	86	76	115	157	54	82	75	97	75	84	102	58	14	197				
Total	350	106	101	142	69	118	83	67	156	142	92	77	64	116	74	74	100	61	13	216				
		30%	29%	41%	20%	34%	24%	19%	45%	40%	26%	22%	18%	33%	21%	21%	28%	17%	4%	62%				
Less than £5k	31	30	1	-	18	12	-	-	19	-	19	-	-	12	-	-	-	-	-	12				
	9%	28%	1%	-%	26%	10%	-%	-%	12%	-%	20%	-%	-%	11%	-%	-%	-%	-%	-%	6%				
		bc			efg	fg			iklnopq		iklnopqs			iklnopq						iklnop				
		96%	4%	-%	57%	38%	-%	-%	60%	-%	60%	-%	-%	40%	-%	-%	-%	-%	-%	40%				
£5k - £9k	26	20	5	1	14	9	-	-	11	6	9	3	2	12	2	2	4	2	1	16				
	7%	19%	5%	1%	21%	8%	-%	-%	7%	4%	9%	4%	3%	10%	3%	3%	4%	4%	11%	7%				
		bc	c		efg	fg			41%	21%	33%	13%	8%	46%	9%	8%	14%	8%	5%	60%				
£10k - £24k	30	14	9	7	15	8	4	3	9	4	6	2	3	19	6	3	6	4	*	26				
	9%	14%	9%	5%	23%	7%	5%	4%	6%	3%	7%	2%	4%	17%	8%	4%	6%	7%	3%	12%				
		c			efg									hiklop						iko				
		47%	30%	22%	51%	28%	13%	8%	30%	15%	21%	6%	9%	64%	21%	9%	21%	14%	1%	85%				
£25k - £49k	40	18	15	8	9	22	3	3	12	18	9	15	3	13	3	7	7	5	2	20				
	11%	17%	14%	5%	13%	19%	3%	4%	7%	13%	10%	20%	4%	12%	4%	9%	7%	8%	16%	9%				
		c	c		f	fg				ln		hlnpq												
		44%	37%	19%	23%	55%	7%	7%	29%	44%	22%	38%	6%	33%	7%	16%	18%	11%	5%	51%				
£50k - £99k	35	3	14	18	2	16	13	4	11	17	6	12	4	12	6	9	11	4	1	23				
	10%	3%	14%	12%	3%	13%	16%	6%	7%	12%	7%	16%	7%	10%	8%	12%	11%	6%	6%	10%				
		a	a		dg		dg					h												
		9%	40%	51%	5%	45%	38%	11%	30%	48%	18%	35%	13%	34%	18%	26%	31%	11%	2%	65%				
£100k - £249k	34	6	12	16	2	20	9	1	13	14	10	11	3	10	8	6	12	7	1	22				
	10%	6%	12%	11%	4%	17%	11%	2%	8%	10%	11%	15%	4%	9%	10%	8%	12%	12%	11%	10%				
					dg	g						l												
		18%	36%	46%	7%	59%	27%	4%	37%	41%	29%	33%	8%	30%	22%	18%	35%	22%	4%	65%				
£250k - £499k	23	3	5	15	1	10	7	4	11	8	4	2	6	10	2	1	2	1	-	12				
	6%	3%	5%	10%	1%	9%	8%	6%	7%	6%	5%	2%	10%	9%	2%	1%	2%	1%	-%	6%				
												knopq		op										
		12%	23%	64%	3%	45%	30%	19%	48%	35%	20%	7%	28%	45%	7%	3%	7%	3%	-%	53%				
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																								

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 10**

**S11. Approximately how much does your organisation spend annually on business communications services within the UK across all sites? (SINGLE CODE)**

Base : All respondents

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION												IP SWITCHED	IP NOT SWITCHED	ANY IP
	Total	1-49 a	50-249 b	250+ c	UNDER				ISDN2 h	ISDN30 i	ISDN2 ONLY j	ISDN30 ONLY k	BOTH ISDN l	IP NOT ISDN m	ISDN2 & IP n	ISDN30 & IP o	ISDN & IP p						
					£1M d	£1M- £20M e	£21M-£100M f	£100M g															
Significance Level: 95%																							
Unweighted total	350	72	84	192	53	109	95	83	165	161	89	85	76	100	91	85	118	67	16	218			
Effective Weighted Sample	289	61	83	178	42	92	86	76	115	157	54	82	75	97	75	84	102	58	14	197			
Total	350	106	101	142	69	118	83	67	156	142	92	77	64	116	74	74	100	61	13	216			
		30%	29%	41%	20%	34%	24%	19%	45%	40%	26%	22%	18%	33%	21%	21%	28%	17%	4%	62%			
£500k - £999k	35	5	12	18	4	9	12	10	22	15	13	6	9	7	12	6	13	7	3	19			
	10%	4%	12%	13%	5%	8%	15%	14%	14%	11%	14%	8%	14%	6%	16%	8%	13%	12%	23%	9%			
									m						m								
		13%	34%	53%	11%	27%	35%	27%	63%	43%	38%	18%	26%	19%	33%	17%	36%	21%	9%	55%			
£1 million - £4 million	37	1	19	16	1	3	22	10	19	27	6	14	13	4	11	16	17	15	2	21			
	11%	1%	19%	11%	1%	2%	27%	15%	12%	19%	7%	18%	20%	3%	15%	22%	17%	25%	12%	10%			
			a	a			de	de	m	jms		m	jms		m	jms	m	hjms					
		4%	52%	44%	2%	7%	61%	27%	52%	72%	17%	37%	35%	11%	31%	43%	47%	40%	4%	58%			
£5 million - £9 million	12	-	3	9	-	3	4	6	7	6	4	2	3	3	4	5	6	3	-	9			
	3%	-%	3%	7%	-%	2%	5%	8%	4%	4%	4%	3%	5%	3%	5%	6%	6%	5%	-%	4%			
				a																			
		-%	23%	77%	-%	23%	31%	46%	56%	46%	30%	20%	26%	25%	33%	39%	46%	26%	-%	71%			
£10 million - £24 million	20	-	2	17	-	1	6	13	15	16	2	2	14	2	15	13	15	10	2	17			
	6%	-%	2%	12%	-%	1%	7%	20%	10%	11%	2%	3%	21%	2%	20%	17%	15%	17%	12%	8%			
				ab			e	def	m	jkm			hijkms		jkms	jkms	jkm	jkms		m			
		-%	12%	88%	-%	5%	28%	67%	78%	81%	9%	12%	69%	10%	74%	65%	74%	51%	8%	84%			
£25 million or more	10	-	-	10	-	-	-	10	5	6	1	2	4	3	4	5	5	2	1	8			
	3%	-%	-%	7%	-%	-%	-%	15%	3%	4%	1%	3%	6%	3%	6%	6%	5%	3%	6%	4%			
				ab				def															
		-%	-%	100%	-%	-%	-%	100%	47%	62%	8%	23%	39%	29%	43%	47%	51%	20%	8%	80%			
Don't know	17	6	4	7	2	5	3	3	4	6	3	5	1	8	1	3	3	-	-	11			
	5%	6%	4%	5%	3%	5%	4%	5%	2%	4%	3%	6%	1%	7%	2%	4%	3%	-%	-%	5%			
												q		q									
		37%	22%	42%	13%	32%	19%	20%	23%	34%	18%	29%	5%	48%	7%	16%	18%	-%	-%	66%			
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																							

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 10

S11. Approximately how much does your organisation spend annually on business communications services within the UK across all sites? (SINGLE CODE)

Base : All respondents

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q
Unweighted total	350	123	94	133	88	53	83	54	154	64	160	57	140	20	150	200	139	193
Effective Weighted Sample	289	83	91	125	60	37	80	53	141	57	127	39	115	14	127	162	110	176
Total	350	124	85	141	82	57	73	49	158	58	153	56	130	22	160	190	162	171
		35%	24%	40%	24%	16%	21%	14%	45%	17%	44%	16%	37%	6%	46%	54%	46%	49%
Less than £5k	31	19	-	12	9	9	-	-	11	1	9	9	3	6	12	19	31	-
	9%	15%	-%	9%	11%	17%	-%	-%	7%	2%	6%	17%	2%	28%	7%	10%	19%	-%
		b		b	fg	fgi			f			j					q	
		60%	-%	40%	30%	30%	-%	-%	35%	5%	30%	30%	10%	20%	38%	62%	100%	-%
£5k - £9k	26	11	3	12	8	3	4	1	11	5	6	8	6	-	17	9	26	-
	7%	9%	4%	9%	9%	5%	6%	2%	7%	9%	4%	14%	5%	-%	11%	5%	16%	-%
									j			j			o		q	
		41%	13%	46%	30%	11%	17%	4%	40%	19%	25%	29%	25%	-%	66%	34%	100%	-%
£10k - £24k	30	7	2	21	1	6	1	2	21	4	6	3	4	2	16	14	30	-
	9%	6%	2%	15%	2%	11%	1%	4%	14%	7%	4%	5%	3%	10%	10%	8%	19%	-%
				ab		f			df								q	
		25%	6%	69%	5%	20%	3%	7%	71%	14%	21%	9%	14%	7%	52%	48%	100%	-%
£25k - £49k	40	9	18	13	9	3	10	8	14	6	19	8	16	3	26	15	40	-
	11%	7%	21%	10%	11%	5%	13%	16%	9%	11%	12%	14%	12%	14%	16%	8%	25%	-%
			ac												o		q	
		22%	44%	33%	22%	7%	24%	20%	35%	16%	47%	20%	39%	8%	64%	36%	100%	-%
£50k - £99k	35	7	10	17	3	5	5	7	18	5	13	4	13	-	15	19	35	-
	10%	6%	12%	12%	4%	9%	6%	15%	11%	8%	9%	8%	10%	-%	9%	10%	21%	-%
								d									q	
		21%	30%	49%	9%	15%	14%	21%	52%	13%	39%	12%	39%	-%	44%	56%	100%	-%
£100k - £249k	34	11	10	13	9	2	6	6	14	8	16	5	14	1	18	16	-	34
	10%	9%	12%	10%	11%	4%	8%	12%	9%	14%	10%	9%	11%	5%	11%	8%	-%	20%
																	p	
		32%	29%	39%	25%	7%	17%	17%	42%	23%	46%	15%	42%	4%	53%	47%	-%	100%
£250k - £499k	23	8	3	11	6	4	2	6	8	4	10	2	10	-	14	9	-	23
	6%	7%	4%	8%	7%	7%	3%	11%	5%	6%	6%	4%	7%	-%	9%	5%	-%	13%
																	p	
		37%	14%	49%	27%	17%	10%	24%	36%	16%	42%	9%	42%	-%	62%	38%	-%	100%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 10

S11. Approximately how much does your organisation spend annually on business communications services within the UK across all sites? (SINGLE CODE)

Base : All respondents

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q
Unweighted total	350	123	94	133	88	53	83	54	154	64	160	57	140	20	150	200	139	193
Effective Weighted Sample	289	83	91	125	60	37	80	53	141	57	127	39	115	14	127	162	110	176
Total	350	124	85	141	82	57	73	49	158	58	153	56	130	22	160	190	162	171
		35%	24%	40%	24%	16%	21%	14%	45%	17%	44%	16%	37%	6%	46%	54%	46%	49%
£500k - £999k	35	16	9	9	9	11	8	6	9	10	22	4	18	3	15	19	-	35
	10%	13%	11%	6%	10%	19%	11%	12%	6%	18%	14%	8%	14%	14%	10%	10%	-%	20%
		47%	27%	26%	25%	32%	22%	16%	25%	30%	62%	12%	53%	9%	44%	56%	-%	100%
£1 million - £4 million	37	14	19	5	10	9	21	5	15	7	26	7	23	3	16	21	-	37
	11%	11%	22%	3%	12%	16%	29%	10%	9%	11%	17%	12%	17%	13%	10%	11%	-%	22%
		c	ac				dghi										p	
		37%	50%	13%	26%	24%	57%	13%	40%	18%	69%	18%	61%	8%	43%	57%	-%	100%
£5 million - £9 million	12	5	2	5	5	1	2	2	7	1	5	2	5	-	1	11	-	12
	3%	4%	2%	4%	6%	2%	2%	3%	5%	2%	3%	4%	4%	-%	1%	6%	-%	7%
		43%	13%	44%	38%	11%	13%	13%	61%	10%	38%	18%	38%	-%	7%	93%	-%	100%
£10 million - £24 million	20	11	4	5	11	2	10	5	13	3	15	-	13	2	7	13	-	20
	6%	9%	5%	4%	13%	3%	13%	10%	8%	6%	10%	-%	10%	7%	4%	7%	-%	12%
		55%	20%	25%	55%	8%	49%	24%	67%	17%	75%	-%	67%	8%	34%	66%	-%	100%
£25 million or more	10	2	2	5	2	-	3	1	5	3	4	1	4	-	-	10	-	10
	3%	2%	3%	4%	3%	-%	4%	2%	3%	5%	2%	2%	3%	-%	-%	5%	-%	6%
		24%	23%	53%	24%	-%	31%	8%	49%	31%	35%	12%	35%	-%	-%	100%	-%	100%
Don't know	17	3	3	11	1	2	2	1	11	*	3	3	1	2	3	13	-	-
	5%	2%	4%	8%	1%	3%	3%	2%	7%	1%	2%	5%	1%	8%	2%	7%	-%	-%
		16%	18%	66%	5%	11%	11%	7%	64%	2%	18%	16%	7%	11%	20%	80%	-%	-%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 10

S11. Approximately how much does your organisation spend annually on business communications services within the UK across all sites? (SINGLE CODE)

Base : All respondents

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
								UP TO							UP TO	OVER			
	LAST YEAR	EVER	NEVER	YES	NO	YES	NO/DK	3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	2 YEARS	2 YEARS	YES	NO/DK	
Significance Level: 95%	Total	a	b	c	d	e	f	g	h	i	j	*k	l	m	n	o	p	q	r
Unweighted total	350	34	128	55	138	55	99	33	156	51	110	22	88	155	92	82	127	156	62
Effective Weighted Sample	289	25	107	37	107	39	72	25	121	41	81	15	77	143	85	74	116	140	57
Total	350	33	119	57	131	53	95	39	151	45	111	22	84	151	85	88	121	153	63
		9%	34%	16%	38%	15%	27%	11%	43%	13%	32%	6%	24%	43%	24%	25%	35%	44%	18%
Less than £5k	31	3	3	12	6	9	9	9	9	3	12	6	1	11	-	5	7	7	6
	9%	9%	3%	22%	5%	18%	10%	24%	6%	7%	11%	28%	2%	7%	-%	6%	6%	4%	9%
				b		d								n					
		10%	10%	40%	20%	30%	30%	30%	30%	10%	40%	20%	4%	36%	-%	17%	23%	22%	18%
£5k - £9k	26	1	3	10	6	6	7	4	7	4	8	3	3	13	-	11	4	5	11
	7%	3%	2%	18%	4%	11%	7%	9%	5%	10%	7%	13%	3%	9%	-%	13%	3%	3%	17%
				b										n		p		q	
		4%	10%	40%	22%	22%	26%	14%	28%	17%	29%	11%	10%	51%	-%	43%	16%	19%	40%
£10k - £24k	30	1	6	2	6	4	2	2	6	3	5	-	10	16	10	17	9	23	2
	9%	3%	5%	4%	4%	7%	2%	6%	4%	7%	4%	-%	11%	11%	12%	19%	7%	15%	4%
				p									r				r		
		4%	20%	7%	19%	12%	7%	8%	20%	11%	15%	-%	32%	54%	33%	56%	29%	77%	8%
£25k - £49k	40	8	13	6	20	6	14	6	21	5	18	1	5	17	7	13	7	9	11
	11%	23%	11%	11%	15%	11%	15%	15%	14%	11%	16%	6%	5%	11%	8%	15%	6%	6%	17%
				p														q	
		19%	32%	15%	49%	15%	34%	15%	54%	12%	45%	4%	11%	42%	17%	33%	17%	24%	27%
£50k - £99k	35	2	10	5	9	6	10	2	13	4	11	1	6	16	11	8	15	16	6
	10%	6%	9%	9%	7%	11%	11%	5%	9%	9%	10%	4%	7%	11%	12%	9%	12%	11%	10%
		6%	30%	15%	26%	17%	29%	5%	38%	12%	32%	2%	17%	46%	31%	23%	42%	47%	18%
£100k - £249k	34	2	13	5	12	7	12	-	17	4	9	3	11	14	9	12	11	16	6
	10%	6%	11%	9%	9%	13%	12%	-%	11%	9%	8%	12%	14%	9%	10%	13%	9%	11%	10%
		6%	39%	16%	34%	20%	35%	-%	49%	12%	27%	8%	34%	40%	25%	34%	31%	47%	18%
£250k - £499k	23	-	9	2	9	3	10	1	11	*	10	*	6	6	6	5	6	12	-
	6%	-%	8%	4%	7%	5%	10%	2%	7%	1%	9%	2%	7%	4%	8%	6%	5%	8%	-%
				r															
		-%	41%	10%	39%	12%	44%	3%	49%	2%	46%	2%	26%	26%	29%	24%	26%	53%	-%
Columns Tested:	a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																		

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 10

S11. Approximately how much does your organisation spend annually on business communications services within the UK across all sites? (SINGLE CODE)

Base : All respondents

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT			
								UP TO							UP TO					
	Total	LAST YEAR	EVER	NEVER	YES	NO	YES	NO/DK	3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK	
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	*k	l	m	n	o	p	q	r	
Unweighted total	350	34	128	55	138	55	99	33	156	51	110	22	88	155	92	82	127	156	62	
Effective Weighted Sample	289	25	107	37	107	39	72	25	121	41	81	15	77	143	85	74	116	140	57	
Total	350	33	119	57	131	53	95	39	151	45	111	22	84	151	85	88	121	153	63	
		9%	34%	16%	38%	15%	27%	11%	43%	13%	32%	6%	24%	43%	24%	25%	35%	44%	18%	
£500k - £999k	35	2	19	5	15	6	11	4	19	7	14	2	8	11	11	8	11	14	6	
	10%	5%	16%	9%	11%	12%	12%	11%	12%	16%	12%	9%	9%	7%	13%	9%	9%	9%	9%	
		5%	55%	14%	42%	18%	32%	13%	54%	20%	39%	6%	22%	31%	33%	22%	32%	39%	16%	
£1 million - £4 million	37	3	27	2	26	2	11	5	27	3	12	4	10	19	9	5	16	19	3	
	11%	8%	23%	4%	20%	5%	11%	13%	18%	6%	10%	18%	12%	13%	11%	6%	13%	12%	4%	
		7%	74%	7%	70%	7%	29%	14%	74%	7%	32%	11%	27%	52%	25%	14%	43%	51%	7%	
£5 million - £9 million	12	-	7	-	7	-	2	1	3	3	4	-	6	5	6	1	8	8	1	
	3%	-	6%	-	5%	-	2%	4%	2%	8%	3%	-	7%	4%	7%	1%	6%	5%	2%	
		-	56%	-	56%	-	18%	11%	28%	28%	29%	-	49%	44%	52%	7%	64%	62%	8%	
£10 million - £24 million	20	9	5	2	13	1	3	-	10	5	3	-	12	14	10	2	15	13	4	
	6%	26%	4%	3%	10%	1%	3%	-	6%	12%	3%	-	14%	9%	11%	2%	12%	9%	6%	
		bc	43%	24%	8%	67%	4%	16%	-	49%	26%	16%	-	60%	71%	48%	8%	76%	66%	18%
£25 million or more	10	3	1	1	4	1	2	-	3	2	2	-	4	5	5	1	7	5	3	
	3%	8%	1%	2%	3%	2%	2%	-	2%	4%	2%	-	4%	3%	6%	1%	5%	3%	5%	
		b	27%	8%	12%	35%	12%	20%	-	32%	16%	20%	-	37%	51%	47%	8%	65%	51%	30%
Don't know	17	*	3	3	*	2	2	4	3	1	4	2	3	3	1	-	6	6	5	
	5%	1%	2%	5%	3%	4%	2%	11%	2%	2%	3%	9%	4%	2%	1%	-	5%	4%	8%	
								f								o				
		2%	15%	16%	2%	11%	9%	25%	20%	5%	22%	12%	20%	20%	7%	-	38%	34%	32%	
Columns Tested:	a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																			

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 11

## S13. Which of these services would you say your business mostly uses? (SINGLE CODE)

Base : All respondents

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP SWITCHED	IP NOT SWITCHED	ANY
					£1M	£1M-£20M	£21M-£100M	OVER £100M										ISDN	ISDN	
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q	r	s
Unweighted total	350	72	84	192	53	109	95	83	165	161	89	85	76	100	91	85	118	67	16	218
Effective Weighted Sample	289	61	83	178	42	92	86	76	115	157	54	82	75	97	75	84	102	58	14	197
Total	350	106	101	142	69	118	83	67	156	142	92	77	64	116	74	74	100	61	13	216
Mostly ISDN2/ISDN2e	124	45	35	43	27	41	28	23	124	36	87	-	36	-	44	24	44	36	8	44
	35%	43%	35%	30%	40%	35%	34%	34%	79%	26%	95%	-%	57%	-%	60%	32%	44%	59%	60%	20%
									iklmnopqs	km	hiklmnopq		ikmos		ikmops	kms	ikms	ikmos		km
Mostly ISDN30		37%	28%	35%	22%	33%	23%	18%	100%	30%	70%	-%	30%	-%	36%	19%	36%	29%	6%	36%
	85	23	26	36	13	30	26	16	16	85	-	70	16	-	13	31	31	25	5	31
	24%	22%	25%	26%	19%	25%	31%	24%	10%	60%	-%	90%	24%	-%	18%	41%	31%	41%	40%	14%
									jm	hijlmnopqs		hijlmnopq	hjms		jm	hijlmns	hjms	hijlmns		jm
Mostly migrated to IP		27%	30%	43%	15%	35%	30%	19%	18%	100%	-%	82%	18%	-%	16%	36%	36%	29%	6%	36%
	141	37	41	63	29	48	29	28	17	20	5	8	12	116	17	20	25	-	-	141
	40%	35%	40%	44%	42%	40%	35%	42%	11%	14%	5%	10%	19%	100%	23%	27%	25%	-%	-%	65%
									q	q		q	jq	hijklnopqs	hjq	hijkq	hijkq			hijklnopq
Columns Tested:		27%	29%	45%	20%	34%	21%	20%	12%	14%	3%	6%	9%	83%	12%	14%	17%	-%	-%	100%

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 11

## S13. Which of these services would you say your business mostly uses? (SINGLE CODE)

Base : All respondents

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q
Unweighted total	350	123	94	133	88	53	83	54	154	64	160	57	140	20	150	200	139	193
Effective Weighted Sample	289	83	91	125	60	37	80	53	141	57	127	39	115	14	127	162	110	176
Total	350	124	85	141	82	57	73	49	158	58	153	56	130	22	160	190	162	171
		35%	24%	40%	24%	16%	21%	14%	45%	17%	44%	16%	37%	6%	46%	54%	46%	49%
Mostly ISDN2/ISDN2e	124	124	-	-	76	48	20	17	28	16	91	32	77	15	55	68	53	68
	35%	100%	-%	-%	92%	84%	27%	34%	18%	27%	60%	58%	59%	66%	35%	36%	33%	40%
		bc			fghi	fghi		h										
		100%	-%	-%	61%	39%	16%	13%	23%	13%	74%	26%	62%	12%	45%	55%	43%	55%
Mostly ISDN30	85	-	85	-	7	9	53	32	19	12	62	24	54	8	45	40	33	49
	24%	-%	100%	-%	8%	16%	73%	66%	12%	20%	40%	42%	41%	34%	28%	21%	21%	29%
			ac				dehi	dehi										
		-%	100%	-%	8%	10%	62%	38%	22%	14%	72%	28%	63%	9%	53%	47%	39%	57%
Mostly migrated to IP	141	-	-	141	-	-	-	-	110	31	-	-	-	-	60	81	76	54
	40%	-%	-%	100%	-%	-%	-%	-%	70%	53%	-%	-%	-%	-%	37%	43%	47%	32%
			ab						defgi	defg							q	
		-%	-%	100%	-%	-%	-%	-%	78%	22%	-%	-%	-%	-%	42%	58%	54%	38%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q



# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 11

S13. Which of these services would you say your business mostly uses? (SINGLE CODE)

Base : All respondents

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
								UP TO 3 YEARS	4+ YEARS						UP TO 2 YEARS	OVER 2 YEARS			
	LAST YEAR	EVER	NEVER	/DK	YES	NO	YES	NO/DK			YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX			YES	NO/DK
Significance Level: 95%	a	b	c	d	e	f	g	h	i	j	*k	l	m	n	o	p	q	r	
Unweighted total	350	34	128	55	138	55	99	33	156	51	110	22	88	155	92	82	127	156	62
Effective Weighted Sample	289	25	107	37	107	39	72	25	121	41	81	15	77	143	85	74	116	140	57
Total	350	33	119	57	131	53	95	39	151	45	111	22	84	151	85	88	121	153	63
		9%	34%	16%	38%	15%	27%	11%	43%	13%	32%	6%	24%	43%	24%	25%	35%	44%	18%
Mostly ISDN2/ISDN2e	124	26	63	34	79	31	55	24	90	23	67	13	26	24	24	17	26	33	11
	35%	79%	53%	60%	60%	59%	58%	63%	60%	52%	60%	56%	31%	16%	28%	20%	22%	21%	18%
		b											m	m					
		21%	51%	28%	64%	25%	44%	20%	73%	19%	54%	10%	21%	20%	19%	14%	21%	26%	9%
Mostly ISDN30	85	7	55	23	53	22	40	14	61	21	45	10	14	25	14	15	16	23	8
	24%	21%	47%	40%	40%	41%	42%	37%	40%	48%	40%	44%	17%	17%	16%	17%	13%	15%	13%
			a																
		8%	65%	27%	62%	26%	47%	17%	71%	25%	52%	11%	16%	30%	16%	18%	18%	26%	10%
Mostly migrated to IP	141	-	-	-	-	-	-	-	-	-	-	-	44	102	47	55	79	98	43
	40%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	53%	67%	56%	63%	65%	64%	69%
													l						
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	32%	72%	34%	39%	56%	69%	31%
Columns Tested:	a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																		

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 12**

## **S14. Why does your company use both ISDN2/ISDN2e and ISDN30? (MULTI CODE)**

Base : Those who use both ISDN2/2e and ISDN30

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION												
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30		IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN	IP SWITCHED		IP NOT SWITCHED	ANY IP
					£1M	£1M-£20M	£21M-£100M	OVER £100M				ONLY	BOTH ISDN					ISDN	ISDN		
Significance Level: 95%		*a	*b	c	*d	*e	f	g	h	i	*j	*k	l	*m	n	o	p	q	*r	s	
Unweighted total	76	4	13	59	5	10	30	30	76	76	-	-	76	-	58	58	58	38	4	58	
Effective Weighted Sample	75	4	13	59	5	10	29	30	75	75	-	-	75	-	57	57	57	37	4	57	
Total	64	4	13	47	5	9	26	24	64	64	-	-	64	-	49	49	49	33	3	49	
		7%	21%	73%	7%	14%	41%	37%	100%	100%	-%	-%	100%	-%	76%	76%	76%	51%	5%	76%	
Flexibility (can add ISDN2 at short notice/for fewer lines)	54	3	9	41	4	6	22	22	54	54	-	-	54	-	43	43	43	32	3	43	
	83%	77%	69%	88%	79%	68%	83%	93%	83%	83%	-%	-%	83%	-%	89%	89%	89%	97%	100%	89%	
		6%	17%	77%	7%	11%	40%	41%	100%	100%	-%	-%	100%	-%	81%	81%	81%	59%	6%	81%	
Use different products at different sites	54	4	12	38	3	7	22	21	54	54	-	-	54	-	44	44	44	31	2	44	
	85%	100%	92%	81%	66%	82%	84%	90%	85%	85%	-%	-%	85%	-%	90%	90%	90%	95%	75%	90%	
		8%	23%	70%	6%	14%	40%	39%	100%	100%	-%	-%	100%	-%	81%	81%	81%	57%	4%	81%	

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 12**

## **S14. Why does your company use both ISDN2/ISDN2e and ISDN30? (MULTI CODE)**

Base : Those who use both ISDN2/2e and ISDN30

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	*b	*c	d	*e	f	*g	h	*i	j	*k	l	*m	*n	o	*p	q
Significance Level: 95%																		
Unweighted total	76	43	18	15	40	21	33	28	40	18	50	11	48	2	29	47	13	62
Effective Weighted Sample	75	42	18	15	40	21	32	28	39	18	49	11	47	2	29	46	13	61
Total	64	36	16	12	33	19	28	24	34	15	43	9	41	2	25	39	12	52
		57%	24%	19%	52%	29%	44%	38%	53%	23%	67%	15%	64%	2%	39%	61%	18%	80%
Flexibility (can add ISDN2 at short notice/for fewer lines)	54	33	12	9	31	14	26	19	30	13	39	6	38	2	20	33	9	44
	83%	89%	78%	72%	92%	75%	94%	77%	89%	89%	92%	61%	91%	100%	82%	84%	76%	85%
		61%	23%	16%	57%	27%	49%	35%	56%	25%	73%	11%	70%	3%	38%	62%	17%	82%
Use different products at different sites	54	31	14	10	29	16	25	20	32	12	38	7	36	2	21	34	10	43
	85%	84%	90%	80%	87%	83%	89%	83%	95%	79%	88%	75%	88%	100%	83%	86%	87%	84%
		56%	26%	18%	53%	29%	46%	37%	60%	22%	69%	13%	66%	3%	38%	62%	19%	80%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 12**

## **S14. Why does your company use both ISDN2/ISDN2e and ISDN30? (MULTI CODE)**

Base : Those who use both ISDN2/2e and ISDN30

	SWITCHING ISDN SUPPLIER				CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%		*a	b	*c	d	*e	*f	*g	h	*i	*j	*k	l	m	n	*o	p	q	*r
Unweighted total	76	19	36	6	50	7	15	3	50	11	17	1	36	44	33	18	39	48	10
Effective Weighted Sample	75	19	35	6	49	7	15	3	49	11	17	1	35	43	33	18	38	47	10
Total	64	16	31	5	43	6	13	3	43	9	14	1	30	37	27	15	33	41	8
		25%	48%	8%	67%	9%	20%	4%	67%	14%	22%	2%	47%	57%	43%	24%	51%	63%	13%
Flexibility (can add ISDN2 at short notice/for fewer lines)	54	15	27	3	40	4	9	1	37	8	10	-	28	35	25	13	30	37	7
	83%	94%	86%	63%	93%	73%	73%	30%	86%	89%	71%	-%	91%	95%	90%	88%	91%	91%	78%
		28%	50%	6%	74%	8%	17%	1%	68%	15%	19%	-%	52%	65%	46%	25%	56%	69%	12%
Use different products at different sites	54	15	26	4	36	5	8	3	36	9	9	1	30	33	24	11	32	37	7
	85%	90%	84%	84%	85%	86%	61%	100%	83%	100%	65%	100%	97%	89%	88%	74%	98%	92%	81%
		27%	48%	8%	66%	9%	14%	5%	65%	17%	17%	2%	54%	60%	44%	21%	59%	69%	12%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 13**

**A1A. How many ISDN2/ ISDN2e channels are in use across your organisation in the UK? Please note that 1 ISDN2/ISDN2e subscription = 2 channels, so for every subscription to ISDN2/ISDN2e you have, this counts as 2 channels. (SINGLE CODE)**

Base : Those who use ISN2/2e (and mostly use an ISDN service)

		COMPANY SIZE			TURNOVER				TELECOMS PROVISION														
		Total	UNDER			OVER			ISDN2		ISDN30		ISDN30		IP		ISDN30		IP SWITCHED		IP NOT SWITCHED		ANY
			1-49	50-249	250+	£1M	£1M-£20M	£21M-£100M	£100M	ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	ISDN	ISDN	ISDN	IP	
			*a	b	c	*d	e	f	g	h	i	j	*k	l	*m	n	o	p	q	*r	s		
Significance Level: 95%																							
Unweighted total		141	23	32	86	19	39	43	37	141	61	80	-	61	-	67	43	67	53	12	67		
Effective Weighted Sample		98	19	31	79	13	28	37	32	98	60	49	-	60	-	55	42	55	44	10	55		
Total		139	46	40	53	29	43	35	28	139	52	87	-	52	-	57	37	57	47	9	57		
			33%	29%	38%	21%	31%	25%	20%	100%	37%	63%	-%	37%	-%	41%	27%	41%	33%	7%	41%		
2 channels (1 ISDN2/ISDN2e subscription)	(2.0)	16	14	1	1	11	4	2	-	16	1	16	-	1	-	1	-	1	-	1	1		
		12%	30%	3%	2%	37%	9%	5%	-%	12%	2%	18%	-%	2%	-%	2%	-%	2%	-%	15%	2%		
			84%	8%	7%	65%	24%	11%	-%	100%	5%	95%	-%	5%	-%	9%	-%	9%	-%	9%	9%		
4 channels (2 ISDN2/ISDN2e subscriptions)	(4.0)	28	15	8	4	13	10	3	2	28	4	24	-	4	-	6	2	6	5	1	6		
		20%	33%	21%	8%	45%	23%	8%	7%	20%	7%	28%	-%	7%	-%	11%	4%	11%	10%	15%	11%		
			55%	30%	15%	47%	36%	10%	7%	100%	13%	87%	-%	13%	-%	22%	6%	22%	17%	5%	22%		
6 channels (3 ISDN2/ISDN2e subscriptions)	(6.0)	14	8	1	5	*	5	3	3	14	3	11	-	3	-	3	-	3	2	*	3		
		10%	16%	3%	10%	1%	11%	8%	9%	10%	6%	13%	-%	6%	-%	5%	-%	5%	5%	4%	5%		
			54%	10%	37%	3%	35%	20%	18%	100%	22%	78%	-%	22%	-%	19%	-%	19%	16%	3%	19%		
8 channels (4 ISDN2/ISDN2e subscriptions)	(8.0)	37	6	17	14	2	18	15	2	37	18	18	-	18	-	18	12	18	16	1	18		
		27%	12%	42%	27%	8%	41%	42%	9%	27%	35%	21%	-%	35%	-%	31%	34%	31%	34%	8%	31%		
			15%	46%	39%	6%	48%	39%	7%	100%	50%	50%	-%	50%	-%	48%	34%	48%	42%	2%	48%		
10-18 channels (5-9 ISDN2/ISDN2e subscriptions)	(14.0)	23	1	10	11	-	6	8	8	23	9	14	-	9	-	12	5	12	9	3	12		
		16%	3%	25%	22%	-%	13%	23%	29%	16%	17%	16%	-%	17%	-%	20%	15%	20%	19%	28%	20%		
			6%	44%	50%	-%	26%	36%	35%	100%	38%	62%	-%	38%	-%	51%	24%	51%	39%	12%	51%		
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																							

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 13**

**A1A. How many ISDN2/ ISDN2e channels are in use across your organisation in the UK? Please note that 1 ISDN2/ISDN2e subscription = 2 channels, so for every subscription to ISDN2/ISDN2e you have, this counts as 2 channels. (SINGLE CODE)**

Base : Those who use ISN2/2e (and mostly use an ISDN service)

		COMPANY SIZE				TURNOVER				TELECOMS PROVISION											IP SWITCHED		IP NOT SWITCHED		ANY
		Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN	IP						
						£1M	£1M-£20M	£21M-£100M	£100M											ISDN	ISDN	ISDN	ISDN		
Significance Level: 95%			*a	b	c	*d	e	f	g	h	i	j	*k	l	*m	n	o	p	q	*r	s				
Unweighted total		141	23	32	86	19	39	43	37	141	61	80	-	61	-	67	43	67	53	12	67				
Effective Weighted Sample		98	19	31	79	13	28	37	32	98	60	49	-	60	-	55	42	55	44	10	55				
Total		139	46	40	53	29	43	35	28	139	52	87	-	52	-	57	37	57	47	9	57				
			33%	29%	38%	21%	31%	25%	20%	100%	37%	63%	-%	37%	-%	41%	27%	41%	33%	7%	41%				
20-28 channels (10-14 ISDN2/ISDN2e subscriptions)		(24.0)	13	3	1	10	3	*	2	9	13	12	2	-	12	-	12	12	12	11	1	12			
			10%	5%	3%	19%	9%	1%	5%	32%	10%	22%	2%	-%	22%	-%	20%	32%	20%	23%	8%	20%			
					b				ef		hj			hj		j	hj	j	hj		j				
				19%	8%	74%	19%	3%	14%	65%	100%	86%	14%	-%	86%	-%	86%	86%	81%	6%	86%				
30 or more channels (15 or more ISDN2/ISDN2e subscriptions)		(34.0)	6	-	1	5	-	-	3	4	6	6	*	-	6	-	6	6	6	4	2	6			
			4%	-%	3%	10%	-%	-%	7%	13%	4%	11%	*%	-%	11%	-%	11%	16%	11%	9%	21%	11%			
					e				e		j			j		j	hj	j	j		j				
				-%	17%	83%	-%	-%	42%	58%	100%	93%	7%	-%	93%	-%	100%	93%	100%	68%	32%	100%			
Don't know		1	-	-	1	-	*	*	*	1	-	1	-	-	-	-	-	-	-	-	-				
		1%	-%	-%	2%	-%	1%	1%	2%	1%	-%	1%	-%	-%	-%	-%	-%	-%	-%	-%	-%				
			-%	-%	100%	-%	33%	33%	33%	100%	-%	100%	-%	-%	-%	-%	-%	-%	-%	-%	-%				
Mean number of channels in use		10.0	5.6	9.5	14.4	5.3	7.3	11.4	17.9	10.0	14.9	7.0	-	14.9	-	14.6	17.8	14.6	14.7	14.9	14.6				
					b			e	ef		hj			hj		hj	hj	hj	hj		hj				
Standard deviation		8.10	5.16	6.03	9.43	6.09	3.83	8.18	9.44	8.10	9.66	5.05	-	9.66	-	9.64	9.93	9.64	9.27	12.25	9.64				
Standard error		.69	1.08	1.07	1.04	1.40	.62	1.26	1.57	.69	1.24	.58	-	1.24	-	1.18	1.51	1.18	1.27	3.54	1.18				
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																									

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 13**

**A1A. How many ISDN2/ ISDN2e channels are in use across your organisation in the UK? Please note that 1 ISDN2/ISDN2e subscription = 2 channels, so for every subscription to ISDN2/ISDN2e you have, this counts as 2 channels. (SINGLE CODE)**

Base : Those who use ISN2/2e (and mostly use an ISDN service)

		MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
			a	*b	*c	d	e	f	*g	h	*i	j	k	l	*m	n	o	p	q
Significance Level: 95%																			
Unweighted total		141	123	18	-	88	53	33	28	42	25	105	36	94	11	58	83	43	94
Effective Weighted Sample		98	83	18	-	60	37	32	28	34	21	77	22	72	7	42	56	27	81
Total		139	124	16	-	82	57	28	24	38	20	103	37	88	15	62	77	57	80
			89%	11%	-%	59%	41%	20%	17%	27%	14%	74%	26%	63%	11%	45%	55%	41%	57%
2 channels (1 ISDN2/ISDN2e subscription)	(2.0)	16	16	-	-	9	8	-	1	1	-	7	10	7	-	7	9	15	1
		12%	13%	-%	-%	11%	13%	-%	3%	4%	-%	7%	27%	8%	-%	12%	12%	27%	2%
			100%	-%	-%	54%	46%	-%	5%	9%	-%	41%	59%	41%	-%	45%	55%	93%	7%
4 channels (2 ISDN2/ISDN2e subscriptions)	(4.0)	28	26	2	-	14	14	3	1	5	1	19	9	17	1	18	10	18	9
		20%	21%	10%	-%	16%	25%	10%	3%	14%	4%	18%	24%	20%	10%	29%	13%	32%	12%
			94%	6%	-%	49%	51%	10%	3%	19%	3%	68%	32%	63%	5%	65%	35%	66%	34%
6 channels (3 ISDN2/ISDN2e subscriptions)	(6.0)	14	14	-	-	12	3	3	-	*	2	13	1	8	5	9	6	7	7
		10%	12%	-%	-%	14%	5%	11%	-%	1%	11%	13%	3%	9%	36%	14%	7%	12%	9%
			100%	-%	-%	81%	19%	22%	-%	3%	16%	91%	9%	54%	37%	60%	40%	50%	50%
8 channels (4 ISDN2/ISDN2e subscriptions)	(8.0)	37	30	7	-	16	21	5	13	8	10	28	9	23	5	15	22	9	27
		27%	24%	46%	-%	20%	37%	19%	55%	20%	52%	27%	25%	26%	34%	24%	29%	15%	34%
			80%	20%	-%	44%	56%	14%	36%	20%	28%	75%	25%	62%	13%	40%	60%	23%	73%
10-18 channels (5-9 ISDN2/ISDN2e subscriptions)	(14.0)	23	20	3	-	17	6	7	2	8	3	19	4	16	3	6	17	4	19
		16%	16%	18%	-%	21%	10%	25%	7%	22%	18%	18%	12%	18%	18%	10%	22%	6%	24%
			88%	12%	-%	75%	25%	31%	7%	36%	15%	81%	19%	70%	11%	26%	74%	16%	84%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																			

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 13**

**A1A. How many ISDN2/ ISDN2e channels are in use across your organisation in the UK? Please note that 1 ISDN2/ISDN2e subscription = 2 channels, so for every subscription to ISDN2/ISDN2e you have, this counts as 2 channels. (SINGLE CODE)**

Base : Those who use ISN2/2e (and mostly use an ISDN service)

		MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
			a	*b	*c	d	e	f	*g	h	*i	j	k	l	*m	n	o	p	q
Significance Level: 95%																			
Unweighted total		141	123	18	-	88	53	33	28	42	25	105	36	94	11	58	83	43	94
Effective Weighted Sample		98	83	18	-	60	37	32	28	34	21	77	22	72	7	42	56	27	81
Total		139	124	16	-	82	57	28	24	38	20	103	37	88	15	62	77	57	80
			89%	11%	-%	59%	41%	20%	17%	27%	14%	74%	26%	63%	11%	45%	55%	41%	57%
20-28 channels (10-14 ISDN2/ISDN2e subscriptions)		(24.0)	13	11	2	-	10	3	6	5	9	12	2	12	-	7	6	3	10
			10%	9%	15%	-%	13%	5%	23%	22%	24%	11%	5%	13%	-%	12%	8%	6%	13%
								e		e									
			82%	18%	-%	78%	22%	47%	40%	67%	19%	86%	14%	86%	-%	53%	47%	25%	75%
30 or more channels (15 or more ISDN2/ISDN2e subscriptions)		(34.0)	6	5	2	-	4	2	3	2	6	6	*	6	-	-	6	*	6
			4%	4%	10%	-%	5%	4%	12%	10%	15%	6%	1%	7%	-%	-%	8%	1%	7%
				74%	26%	-%	62%	38%	55%	38%	93%	93%	7%	93%	-%	-%	100%	7%	93%
Don't know		1	1	-	-	1	*	-	-	-	-	*	1	-	*	-	1	-	-
		1%	1%	-%	-%	1%	1%	-%	-%	-%	-%	33%	2%	-%	3%	-%	2%	-%	-%
			100%	-%	-%	67%	33%	-%	-%	-%	-%	33%	67%	-%	33%	-%	100%	-%	-%
Mean number of channels in use		10.0	9.5	13.7	-	10.9	8.6	15.6	14.1	16.3	11.3	11.0	7.1	11.5	8.0	8.3	11.4	6.3	12.6
								de		de		k						p	
Standard deviation		8.10	7.84	9.38	-	8.45	7.43	9.80	9.64	10.51	6.82	8.45	6.29	8.93	3.22	6.57	8.97	5.96	8.51
Standard error		.69	.72	2.21	-	.91	1.03	1.71	1.82	1.62	1.36	.83	1.08	.92	1.02	.86	1.00	.91	.88
Columns Tested:		a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																	



# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 13**

**A1A. How many ISDN2/ ISDN2e channels are in use across your organisation in the UK? Please note that 1 ISDN2/ISDN2e subscription = 2 channels, so for every subscription to ISDN2/ISDN2e you have, this counts as 2 channels. (SINGLE CODE)**

Base : Those who use ISN2/2e (and mostly use an ISDN service)

		SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT							
		NEVER							UP TO 3 YEARS				SIP TRUNKING			HOSTED VOIP		IP CENTREX		UP TO 2 YEARS		OVER 2 YEARS			
		LAST YEAR	EVER	/DK	YES	NO	YES	NO/DK			YES	NO/DK											YES	NO/DK	
		*a	b	c	d	e	f	*g	h	i	j	*k	l	m	n	*o	p	q	*r						
Significance Level: 95%																									
Unweighted total		141	27	81	33	93	33	55	19	104	30	63	11	37	45	37	22	44	50	17					
Effective Weighted Sample		98	19	63	19	67	20	35	13	74	21	42	6	29	41	33	16	39	41	14					
Total		139	27	76	37	91	33	56	25	103	26	69	13	33	36	30	21	36	43	14					
			19%	54%	26%	65%	23%	41%	18%	74%	19%	50%	9%	24%	26%	21%	15%	26%	31%	10%					
2 channels (1 ISDN2/ISDN2e subscription)		(2.0)	16	3	3	11	5	8	9	6	6	5	12	4	-	1	-	-	1	-	1				
			12%	12%	3%	29%	6%	25%	16%	25%	6%	18%	17%	28%	-%	4%	-%	-%	4%	-%	10%				
				19%	16%	b 65%	32%	d 49%	54%	38%	35%	27%	70%	21%	-%	9%	-%	-%	9%	-%	9%				
4 channels (2 ISDN2/ISDN2e subscriptions)		(4.0)	28	3	14	10	21	7	17	5	23	4	19	2	5	2	1	4	2	6	-				
			20%	12%	19%	28%	23%	21%	30%	18%	23%	16%	28%	18%	14%	4%	5%	19%	6%	14%	-%				
				12%	51%	37%	75%	25%	61%	17%	84%	15%	70%	8%	16%	6%	5%	14%	8%	22%	-%				
6 channels (3 ISDN2/ISDN2e subscriptions)		(6.0)	14	3	8	4	10	4	8	4	14	*	9	3	-	1	2	1	2	1	1				
			10%	12%	10%	10%	11%	12%	14%	15%	13%	2%	12%	25%	-%	2%	7%	4%	5%	3%	9%				
				22%	53%	25%	72%	28%	54%	27%	97%	3%	60%	22%	-%	6%	16%	6%	13%	10%	9%				
8 channels (4 ISDN2/ISDN2e subscriptions)		(8.0)	37	5	29	3	25	7	13	6	27	9	18	1	11	10	7	7	11	13	5				
			27%	17%	c 39%	8%	28%	21%	22%	25%	27%	35%	25%	12%	32%	29%	23%	32%	30%	30%	36%				
				13%	79%	8%	68%	19%	34%	17%	74%	25%	48%	4%	29%	28%	19%	18%	29%	35%	14%				
10-18 channels (5-9 ISDN2/ISDN2e subscriptions)		(14.0)	23	5	13	5	11	6	8	3	18	2	10	1	5	9	6	3	9	8	4				
			16%	17%	17%	14%	13%	17%	14%	13%	17%	9%	14%	11%	16%	26%	20%	13%	25%	18%	28%				
				20%	57%	23%	50%	25%	35%	14%	78%	10%	43%	6%	23%	41%	27%	12%	39%	33%	17%				
Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																									

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 13**

**A1A. How many ISDN2/ ISDN2e channels are in use across your organisation in the UK? Please note that 1 ISDN2/ISDN2e subscription = 2 channels, so for every subscription to ISDN2/ISDN2e you have, this counts as 2 channels. (SINGLE CODE)**

Base : Those who use ISN2/2e (and mostly use an ISDN service)

		SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT			
		NEVER							UP TO 3 YEARS	4+ YEARS			SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK		
		LAST YEAR	EVER	/DK	YES	NO	YES	NO/DK			YES	NO/DK									
		*a	b	c	d	e	f	*g	h	i	j	*k	l	m	n	*o	p	q	*r		
Significance Level: 95%																					
Unweighted total		141	27	81	33	93	33	55	19	104	30	63	11	37	45	37	22	44	50	17	
Effective Weighted Sample		98	19	63	19	67	20	35	13	74	21	42	6	29	41	33	16	39	41	14	
Total		139	27	76	37	91	33	56	25	103	26	69	13	33	36	30	21	36	43	14	
			19%	54%	26%	65%	23%	41%	18%	74%	19%	50%	9%	24%	26%	21%	15%	26%	31%	10%	
20-28 channels (10-14 ISDN2/ISDN2e subscriptions)		(24.0)	13	6	7	1	12	1	2	-	11	3	2	-	9	9	8	4	7	11	1
		10%	22%	9%	2%	13%	4%	3%	-%	10%	10%	3%	-%	27%	25%	27%	21%	20%	25%	6%	
			44%	51%	6%	91%	9%	14%	-%	80%	20%	14%	-%	67%	66%	61%	32%	55%	81%	6%	
30 or more channels (15 or more ISDN2/ISDN2e subscriptions)		(34.0)	6	2	2	5	-	-	-	3	3	-	-	3	3	5	2	4	5	2	
		4%	7%	3%	5%	5%	-%	-%	-%	3%	11%	-%	-%	10%	9%	17%	11%	10%	11%	11%	
			29%	38%	32%	80%	-%	-%	-%	55%	45%	-%	-%	55%	55%	80%	38%	62%	74%	26%	
Don't know		1	*	-	1	*	-	*	1	1	-	*	1	-	-	-	-	-	-	-	
		1%	2%	-%	2%	*%	-%	1%	3%	1%	-%	1%	7%	-%	-%	-%	-%	-%	-%	-%	
			33%	-%	67%	33%	-%	33%	67%	67%	-%	33%	67%	-%	-%	-%	-%	-%	-%	-%	
Mean number of channels in use		10.0	12.9	10.1	7.5	10.8	7.1	6.9	6.2	10.1	11.3	6.9	5.6	15.5	15.5	17.6	14.2	14.9	15.2	12.7	
Standard deviation		8.10	9.78	7.15	8.13	8.69	5.34	4.88	3.86	7.62	10.26	4.70	3.85	9.74	9.20	10.11	10.23	9.46	9.75	9.38	
Standard error		.69	1.92	.79	1.46	.91	.93	.66	.94	.75	1.87	.60	1.28	1.60	1.37	1.66	2.18	1.43	1.38	2.28	
Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																					

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 14**

**A1B. How many ISDN30 channels are in use across your organisation in the UK? Please note that 1 ISDN30 subscription = 30 channels, so for every subscription to ISDN30 you have, this counts as 30 channels. (SINGLE CODE)**

Base : Those who use ISN30 (and mostly use an ISDN service)

		COMPANY SIZE			TURNOVER				TELECOMS PROVISION													
		Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP		ISDN30 & IP	ISDN & IP	IP SWITCHED		IP NOT SWITCHED	ANY IP
			*a	b	c	£1M	£1M-£20M	£21M-£100M	£100M						*m	& n			o	p		
Significance Level: 95%																						
Unweighted total		137	25	32	79	16	37	45	37	61	137	-	76	61	-	43	61	61	52	8	61	
Effective Weighted Sample		133	25	32	79	16	36	44	36	60	133	-	74	60	-	42	60	60	51	8	60	
Total		122	26	33	62	16	35	41	29	52	122	-	70	52	-	37	54	54	47	7	54	
			22%	27%	51%	13%	29%	33%	24%	43%	100%	-%	57%	43%	-%	30%	45%	45%	38%	6%	45%	
30 channels (1 ISDN30 subscription)	(30.0)	10	8	1	1	3	6	1	-	1	10	-	9	1	-	1	3	3	2	1	3	
		8%	32%	3%	1%	20%	17%	2%	-%	2%	8%	-%	13%	2%	-%	3%	6%	6%	5%	15%	6%	
			82%	10%	8%	32%	fg	60%	8%	-%	10%	100%	-%	hl	90%	10%	-%	10%	31%	31%	21%	10%
60 channels (2 ISDN30 subscriptions)	(60.0)	6	3	-	3	-	2	2	3	1	6	-	5	1	-	-	2	2	1	1	2	
		5%	12%	-%	5%	-%	6%	4%	9%	2%	5%	-%	7%	2%	-%	-%	3%	3%	2%	12%	3%	
			50%	-%	50%	-%	34%	25%	41%	18%	100%	-%	82%	18%	-%	-%	28%	28%	16%	13%	28%	
90-120 channels (3-4 ISDN30 subscriptions)	(105.0)	19	6	5	7	8	7	4	1	4	19	-	15	4	-	2	2	2	2	-	2	
		15%	25%	16%	11%	48%	19%	9%	3%	8%	15%	-%	21%	8%	-%	4%	4%	4%	5%	-%	4%	
			35%	28%	38%	40%	g	36%	19%	4%	22%	ops	-%	hlnopqs	78%	22%	-%	8%	13%	13%	13%	-%
150-270 channels (5-9 ISDN30 subscriptions)	(210.0)	27	6	9	12	3	12	8	4	10	27	-	18	10	-	5	9	9	7	1	9	
		22%	24%	28%	19%	18%	35%	19%	14%	18%	22%	-%	25%	18%	-%	15%	17%	17%	15%	15%	17%	
			23%	34%	43%	10%	g	45%	28%	14%	35%	100%	-%	65%	35%	-%	20%	34%	34%	26%	4%	34%
300-420 channels (10-14 ISDN30 subscriptions)	(360.0)	31	-	14	17	-	6	18	6	14	31	-	17	14	-	11	19	19	16	2	19	
		25%	-%	44%	27%	-%	17%	44%	22%	27%	25%	-%	24%	27%	-%	29%	34%	34%	35%	35%	34%	
			-%	47%	53%	-%	eg	58%	20%	45%	100%	-%	55%	45%	-%	34%	60%	60%	53%	8%	60%	
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																						

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 14**

**A1B. How many ISDN30 channels are in use across your organisation in the UK? Please note that 1 ISDN30 subscription = 30 channels, so for every subscription to ISDN30 you have, this counts as 30 channels. (SINGLE CODE)**

Base : Those who use ISN30 (and mostly use an ISDN service)

		COMPANY SIZE				TURNOVER				TELECOMS PROVISION												
						UNDER						ISDN30		IP		ISDN30		IP SWITCHED		IP NOT SWITCHED		
		Total	1-49	50-249	250+	£1M	£1M-£20M	£21M-£100M	OVER £100M	ISDN2	ISDN30	ISDN2 ONLY	ONLY	BOTH	NOT ISDN	ISDN2 & IP	& IP	ISDN & IP	ISDN	ISDN	ANY IP	
			*a	b	c	*d	e	f	g	h	i	*j	k	l	*m	n	o	p	q	*r	s	
Significance Level: 95%																						
Unweighted total		137	25	32	79	16	37	45	37	61	137	-	76	61	-	43	61	61	52	8	61	
Effective Weighted Sample		133	25	32	79	16	36	44	36	60	133	-	74	60	-	42	60	60	51	8	60	
Total		122	26	33	62	16	35	41	29	52	122	-	70	52	-	37	54	54	47	7	54	
			22%	27%	51%	13%	29%	33%	24%	43%	100%	-%	57%	43%	-%	30%	45%	45%	38%	6%	45%	
450-570 channels (15-19 ISDN30 subscriptions)		(510.0)	11	1	2	8	1	1	4	5	8	11	-	3	8	-	5	6	6	5	1	6
			9%	4%	6%	13%	7%	3%	10%	17%	15%	9%	-%	5%	15%	-%	12%	10%	10%	10%	12%	10%
				10%	19%	71%	10%	9%	38%	43%	69%	100%	-%	31%	69%	-%	41%	50%	50%	43%	7%	50%
600-1470 channels (20-49 ISDN30 subscriptions)		(1035.0)	12	-	-	12	-	-	4	8	11	12	-	1	11	-	10	10	10	10	-	10
			10%	-%	-%	19%	-%	-%	10%	28%	21%	10%	-%	1%	21%	-%	28%	19%	19%	22%	-%	19%
					b				ef	ik	k		-%	7%	ik	-%	ik	k	k	ik	-%	k
				-%	-%	100%	-%	-%	33%	67%	93%	100%	-%	7%	93%	-%	87%	87%	87%	87%	-%	87%
1500 or more channels (50 or more ISDN30 subscriptions)		(1700.0)	4	-	1	3	-	1	1	2	3	4	-	1	3	-	3	3	3	3	1	3
			3%	-%	3%	5%	-%	2%	3%	8%	7%	3%	-%	1%	7%	-%	9%	6%	6%	6%	12%	6%
				-%	25%	75%	-%	19%	25%	57%	81%	100%	-%	19%	81%	-%	81%	81%	81%	62%	19%	81%
Don't know		1	1	-	-	1	-	-	-	-	1	-	1	-	-	-	-	-	-	-	-	-
			1%	4%	-%	7%	-%	-%	-%	-%	1%	-%	2%	-%	-%	-%	-%	-%	-%	-%	-%	-%
				100%	-%	100%	-%	-%	-%	-%	100%	-%	100%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Mean number of channels in use		369.6	118.6	318.9	498.1	139.2	217.3	406.7	627.2	551.6	369.6	-	231.0	551.6	-	647.4	520.6	520.6	540.9	427.6	520.6	
					b			e	ef	ik	k			ik		ik	ik	ik	ik		ik	
Standard deviation		373.16	111.43	279.45	426.30	125.46	259.49	329.21	476.97	444.40	373.16	-	228.32	444.40	-	477.08	440.30	440.30	433.44	528.14	440.30	
Standard error		32.00	22.75	49.40	47.96	32.39	42.66	49.08	78.41	56.90	32.00	-	26.36	56.90	-	72.75	56.37	56.37	60.11	186.73	56.37	
Columns Tested:		a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																				

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 14**

**A1B. How many ISDN30 channels are in use across your organisation in the UK? Please note that 1 ISDN30 subscription = 30 channels, so for every subscription to ISDN30 you have, this counts as 30 channels. (SINGLE CODE)**

Base : Those who use ISN30 (and mostly use an ISDN service)

		MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
			a	b	*c	d	*e	f	g	h	*i	j	k	l	*m	n	o	p	q
Significance Level: 95%																			
Unweighted total		137	43	94	-	40	21	83	54	40	21	105	32	94	11	66	71	40	94
Effective Weighted Sample		133	42	91	-	40	21	80	53	39	21	103	30	92	11	64	70	38	93
Total		122	36	85	-	33	19	73	49	36	19	93	29	84	9	60	61	38	81
			30%	70%	-%	27%	15%	60%	40%	29%	15%	76%	24%	69%	8%	50%	50%	31%	66%
30 channels (1 ISDN30 subscription)	(30.0)	10	1	9	-	1	-	7	3	1	2	5	5	5	-	4	6	9	1
		8%	3%	11%	-%	3%	-%	10%	6%	3%	11%	6%	17%	6%	-%	7%	10%	24%	1%
			10%	90%	-%	10%	-%	72%	28%	11%	20%	51%	49%	51%	-%	42%	58%	90%	10%
60 channels (2 ISDN30 subscriptions)	(60.0)	6	1	5	-	-	1	6	-	1	1	4	2	4	-	4	2	4	2
		5%	3%	6%	-%	-%	6%	9%	-%	3%	4%	5%	6%	5%	-%	6%	4%	10%	3%
			18%	82%	-%	-%	18%	100%	-%	16%	13%	72%	28%	72%	-%	62%	38%	62%	38%
90-120 channels (3-4 ISDN30 subscriptions)	(105.0)	19	3	15	-	2	2	7	12	2	1	14	5	12	2	16	3	11	7
		15%	9%	18%	-%	7%	9%	9%	25%	4%	4%	15%	17%	14%	21%	27%	4%	28%	9%
			18%	82%	-%	13%	10%	35%	65%	8%	4%	73%	27%	63%	10%	86%	14%	57%	37%
150-270 channels (5-9 ISDN30 subscriptions)	(210.0)	27	5	22	-	3	6	12	16	5	4	20	8	16	4	12	15	10	18
		22%	14%	26%	-%	10%	33%	16%	32%	14%	24%	21%	26%	19%	45%	20%	25%	25%	22%
			19%	81%	-%	12%	23%	43%	57%	18%	16%	72%	28%	57%	15%	44%	56%	35%	65%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																			

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 14**

**A1B. How many ISDN30 channels are in use across your organisation in the UK? Please note that 1 ISDN30 subscription = 30 channels, so for every subscription to ISDN30 you have, this counts as 30 channels. (SINGLE CODE)**

Base : Those who use ISN30 (and mostly use an ISDN service)

		MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER			
		Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+	
			a	b	*c	d	*e	f	g	h	*i	j	k	l	*m	n	o	p	q	
Significance Level: 95%																				
Unweighted total		137	43	94	-	40	21	83	54	40	21	105	32	94	11	66	71	40	94	
Effective Weighted Sample		133	42	91	-	40	21	80	53	39	21	103	30	92	11	64	70	38	93	
Total		122	36	85	-	33	19	73	49	36	19	93	29	84	9	60	61	38	81	
			30%	70%	-%	27%	15%	60%	40%	29%	15%	76%	24%	69%	8%	50%	50%	31%	66%	
300-420 channels (10-14 ISDN30 subscriptions)		(360.0)	31	7	24	-	10	4	23	8	13	5	28	3	25	2	15	16	3	28
		25%	19%	28%	-%	29%	23%	32%	16%	37%	29%	30%	11%	30%	26%	25%	26%	7%	35%	
								g		g		k						p		
			22%	78%	-%	31%	14%	75%	25%	43%	18%	90%	10%	82%	8%	48%	52%	8%	92%	
450-570 channels (15-19 ISDN30 subscriptions)		(510.0)	11	7	4	-	6	2	6	6	3	3	7	4	7	-	3	8	2	8
		9%	19%	5%	-%	17%	11%	8%	11%	8%	15%	8%	13%	9%	-%	5%	13%	6%	10%	
			b																	
			62%	38%	-%	50%	19%	50%	50%	24%	26%	67%	33%	67%	-%	26%	74%	19%	73%	
600-1470 channels (20-49 ISDN30 subscriptions)		(1035.0)	12	9	3	-	9	2	8	4	8	2	11	1	10	1	6	6	-	12
		10%	24%	4%	-%	26%	13%	11%	8%	22%	13%	12%	3%	12%	9%	10%	9%	-%	15%	
			b			fg												p		
			73%	27%	-%	73%	20%	67%	33%	67%	20%	93%	7%	87%	7%	53%	47%	-%	100%	
1500 or more channels (50 or more ISDN30 subscriptions)		(1700.0)	4	3	1	-	3	1	3	1	3	-	3	1	3	-	-	4	-	4
		3%	9%	1%	-%	8%	4%	5%	2%	9%	-%	4%	3%	4%	-%	-%	7%	-%	5%	
			b													n				
			81%	19%	-%	62%	19%	81%	19%	81%	-%	81%	19%	81%	-%	-%	100%	-%	100%	

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 14**

**A1B. How many ISDN30 channels are in use across your organisation in the UK? Please note that 1 ISDN30 subscription = 30 channels, so for every subscription to ISDN30 you have, this counts as 30 channels. (SINGLE CODE)**

Base : Those who use ISN30 (and mostly use an ISDN service)

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
a	b	*c	d	*e	f	g	h	*i	j	k	l	*m	n	o	p	q		
Significance Level: 95%																		
Unweighted total	137	43	94	-	40	21	83	54	40	21	105	32	94	11	66	71	40	94
Effective Weighted Sample	133	42	91	-	40	21	80	53	39	21	103	30	92	11	64	70	38	93
Total	122	36	85	-	33	19	73	49	36	19	93	29	84	9	60	61	38	81
		30%	70%	-%	27%	15%	60%	40%	29%	15%	76%	24%	69%	8%	50%	50%	31%	66%
Don't know	1	-	1	-	-	-	1	-	-	-	-	1	-	-	-	1	-	-
	1%	-%	1%	-%	-%	-%	2%	-%	-%	-%	-%	4%	-%	-%	-%	2%	-%	-%
		-%	100%	-%	-%	-%	100%	-%	-%	-%	-%	j 100%	-%	-%	-%	100%	-%	-%
Mean number of channels in use	369.6	610.1	265.2	-	622.5	426.6	401.4	322.6	597.1	374.0	399.0	271.1	410.2	297.4	296.8	442.4	149.4	476.1
		b			fg				fg							n		p
Standard deviation	373.16	488.69	248.88	-	459.64	397.22	407.09	314.69	484.68	299.09	382.87	325.90	393.85	256.59	285.52	434.28	128.61	407.08
Standard error	32.00	74.53	25.81	-	72.68	86.68	44.96	42.82	76.64	65.27	37.36	58.53	40.62	77.36	35.15	51.91	20.33	41.99
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 14**

**A1B. How many ISDN30 channels are in use across your organisation in the UK? Please note that 1 ISDN30 subscription = 30 channels, so for every subscription to ISDN30 you have, this counts as 30 channels. (SINGLE CODE)**

Base : Those who use ISN30 (and mostly use an ISDN service)

		SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
		NEVER							UP TO 3 YEARS	4+ YEARS			SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK	
		LAST YEAR	EVER	/DK	YES	NO	YES	NO/DK			YES	NO/DK								
		*a	b	*c	d	*e	f	*g	h	i	j	*k	l	m	n	*o	p	q	*r	
Significance Level: 95%																				
Unweighted total		137	26	83	28	95	29	59	17	102	32	64	12	34	47	31	25	36	48	13
Effective Weighted Sample		133	26	80	27	92	28	57	17	99	31	62	12	33	46	30	25	35	47	13
Total		122	22	74	25	83	26	51	16	91	28	56	11	30	42	27	23	31	43	12
			18%	61%	21%	68%	21%	42%	13%	74%	23%	46%	9%	25%	34%	22%	19%	26%	35%	10%
30 channels (1 ISDN30 subscription)	(30.0)	10	1	3	6	3	6	3	4	7	2	4	3	1	2	-	3	-	1	2
		8%	4%	4%	24%	4%	23%	6%	25%	8%	8%	7%	27%	3%	5%	-%	14%	-%	3%	17%
			10%	31%	59%	31%	58%	29%	40%	68%	21%	40%	29%	10%	21%	-%	31%	-%	11%	20%
60 channels (2 ISDN30 subscriptions)	(60.0)	6	1	1	4	2	2	4	-	4	2	2	3	1	1	-	1	1	2	-
		5%	5%	1%	16%	3%	6%	9%	-%	4%	6%	3%	24%	3%	2%	-%	4%	3%	4%	-%
			18%	16%	66%	34%	25%	72%	-%	62%	25%	31%	41%	16%	13%	-%	16%	13%	28%	-%
90-120 channels (3-4 ISDN30 subscriptions)	(105.0)	19	1	16	2	13	4	13	3	16	3	16	-	2	2	1	2	-	2	-
		15%	4%	21%	8%	16%	14%	26%	20%	17%	11%	29%	-%	5%	6%	3%	10%	-%	6%	-%
			4%	85%	11%	69%	19%	70%	17%	83%	17%	87%	-%	8%	13%	4%	13%	-%	13%	-%
150-270 channels (5-9 ISDN30 subscriptions)	(210.0)	27	2	21	5	17	7	13	5	20	7	16	2	4	8	5	5	4	5	5
		22%	8%	28%	19%	20%	25%	26%	29%	22%	25%	29%	17%	12%	20%	17%	21%	14%	11%	40%
			7%	76%	17%	62%	24%	49%	17%	74%	26%	59%	7%	13%	30%	17%	18%	16%	17%	17%
300-420 channels (10-14 ISDN30 subscriptions)	(360.0)	31	6	21	4	26	4	12	1	27	4	11	2	10	15	8	7	11	16	2
		25%	27%	28%	16%	31%	15%	23%	5%	30%	15%	19%	15%	32%	36%	28%	31%	36%	38%	20%
			19%	68%	13%	84%	13%	37%	3%	86%	14%	35%	5%	31%	49%	24%	23%	37%	53%	8%
Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																				



# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 14**

**A1B. How many ISDN30 channels are in use across your organisation in the UK? Please note that 1 ISDN30 subscription = 30 channels, so for every subscription to ISDN30 you have, this counts as 30 channels. (SINGLE CODE)**

Base : Those who use ISN30 (and mostly use an ISDN service)

		SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT			
		NEVER											SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS				
Total		LAST YEAR	EVER	/DK	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK						YES	NO/DK		
Significance Level: 95%		*a	b	*c	d	*e	f	*g	h	i	j	*k	l	m	n	*o	p	q	*r		
Unweighted total		137	26	83	28	95	29	59	17	102	32	64	12	34	47	31	25	36	48	13	
Effective Weighted Sample		133	26	80	27	92	28	57	17	99	31	62	12	33	46	30	25	35	47	13	
Total		122	22	74	25	83	26	51	16	91	28	56	11	30	42	27	23	31	43	12	
			18%	61%	21%	68%	21%	42%	13%	74%	23%	46%	9%	25%	34%	22%	19%	26%	35%	10%	
450-570 channels (15-19 ISDN30 subscriptions)		(510.0)	11	3	7	2	8	3	4	2	7	4	6	-	3	3	4	2	3	5	1
		9%	12%	9%	6%	9%	10%	8%	10%	8%	13%	10%	-%	9%	8%	14%	9%	11%	11%	9%	
			24%	61%	14%	69%	24%	36%	14%	66%	34%	50%	-%	24%	31%	34%	19%	31%	41%	9%	
600-1470 channels (20-49 ISDN30 subscriptions)		(1035.0)	12	7	5	-	12	-	2	-	8	4	2	-	8	8	8	2	9	9	1
		10%	32%	6%	-%	14%	-%	3%	-%	9%	14%	3%	-%	26%	19%	29%	7%	28%	22%	7%	
			60%	40%	-%	100%	-%	13%	-%	67%	33%	13%	-%	67%	67%	67%	13%	73%	80%	7%	
1500 or more channels (50 or more ISDN30 subscriptions)		(1700.0)	4	2	1	2	3	1	-	1	2	2	-	1	3	2	3	1	3	3	1
		3%	8%	1%	6%	3%	3%	-%	5%	2%	8%	-%	7%	9%	4%	10%	3%	8%	6%	7%	
			43%	19%	38%	62%	19%	-%	19%	43%	57%	-%	19%	62%	43%	62%	19%	62%	62%	19%	
Don't know		1	-	-	1	-	1	-	1	-	-	-	1	-	-	-	-	-	-	-	
		1%	-%	-%	4%	-%	4%	-%	7%	-%	-%	-%	10%	-%	-%	-%	-%	-%	-%	-%	
			-%	-%	100%	-%	100%	-%	100%	-%	-%	-%	100%	-%	-%	-%	-%	-%	-%	-%	
Mean number of channels in use		369.6	651.4	316.4	272.1	421.8	244.6	241.8	256.8	342.3	479.6	242.3	262.1	615.2	492.0	672.9	350.5	646.3	555.6	392.2	
Standard deviation		373.16	482.81	274.63	413.75	376.97	310.26	198.98	380.33	326.92	488.43	195.05	469.91	483.25	410.58	473.56	360.46	456.66	437.70	445.02	
Standard error		32.00	94.69	30.14	79.63	38.68	58.63	25.91	95.08	32.37	86.34	24.38	141.68	82.88	59.89	85.05	72.09	76.11	63.18	123.43	

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 15**

**A2A. Can you specify whether you use ISDN2/2e for the following business uses? (MULTI CODE)**

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION												
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP SWITCHED		IP NOT SWITCHED	
					£1M	£1M-£20M	£21M-£100M	OVER £100M										ISDN	ISDN	ISDN	ISDN
Significance Level: 95%		*a	b	c	*d	e	f	g	h	i	j	*k	l	*m	n	o	p	q	*r	s	
Unweighted total	141	23	32	86	19	39	43	37	141	61	80	-	61	-	67	43	67	53	12	67	
Effective Weighted Sample	98	19	31	79	13	28	37	32	98	60	49	-	60	-	55	42	55	44	10	55	
Total	139	46	40	53	29	43	35	28	139	52	87	-	52	-	57	37	57	47	9	57	
		33%	29%	38%	21%	31%	25%	20%	100%	37%	63%	-%	37%	-%	41%	27%	41%	33%	7%	41%	
Incoming calls	105	37	27	42	25	27	28	24	105	45	60	-	45	-	51	33	51	41	9	51	
	75%	79%	66%	79%	86%	62%	81%	86%	75%	86%	69%	-%	86%	-%	88%	91%	88%	88%	100%	88%	
					e			j		j		-%	j	-%	j	hj	j	j		j	
		35%	25%	40%	24%	26%	27%	23%	100%	42%	58%	-%	42%	-%	48%	32%	48%	39%	9%	48%	
Outgoing calls	97	40	20	37	26	26	22	23	97	34	64	-	34	-	44	25	44	34	9	44	
	70%	86%	50%	71%	90%	61%	62%	83%	70%	64%	73%	-%	64%	-%	77%	68%	77%	73%	100%	77%	
				b								-%		-%							
		41%	21%	38%	27%	27%	22%	23%	100%	35%	65%	-%	35%	-%	45%	26%	45%	35%	10%	45%	
Internet services	96	29	30	37	18	27	26	21	96	37	58	-	37	-	41	29	41	34	6	41	
	69%	62%	75%	70%	61%	63%	75%	74%	69%	71%	67%	-%	71%	-%	71%	79%	71%	73%	68%	71%	
		30%	32%	39%	18%	29%	27%	21%	100%	39%	61%	-%	39%	-%	43%	30%	43%	35%	7%	43%	
Fax services	86	27	27	32	18	30	21	18	86	37	49	-	37	-	37	28	37	31	5	37	
	62%	58%	67%	62%	61%	68%	60%	64%	62%	71%	57%	-%	71%	-%	65%	77%	65%	67%	53%	65%	
												-%		-%		j					
		31%	31%	38%	20%	34%	24%	20%	100%	43%	57%	-%	43%	-%	43%	33%	43%	36%	6%	43%	
Calls between different sites	75	14	25	36	13	18	22	22	75	34	41	-	34	-	41	29	41	32	8	41	
	54%	30%	63%	68%	44%	41%	63%	80%	54%	65%	47%	-%	65%	-%	71%	79%	71%	69%	81%	71%	
					e							-%		-%	hj	hj	hj	j		hj	
		18%	34%	48%	17%	24%	29%	29%	100%	46%	54%	-%	46%	-%	54%	39%	54%	43%	10%	54%	
Data services	71	10	23	38	8	14	27	21	71	37	34	-	37	-	40	28	40	32	7	40	
	51%	21%	58%	72%	27%	32%	78%	75%	51%	71%	38%	-%	71%	-%	69%	76%	69%	70%	72%	69%	
					e		e			hj		-%	hj	-%	hj	hj	hj	hj		hj	
		14%	33%	53%	11%	20%	38%	29%	100%	53%	47%	-%	53%	-%	56%	40%	56%	46%	10%	56%	
Security/alarm systems	62	16	16	30	6	20	21	15	62	35	27	-	35	-	36	30	36	33	2	36	
	44%	34%	40%	57%	22%	45%	60%	53%	44%	67%	31%	-%	67%	-%	62%	82%	62%	71%	25%	62%	
										hj		-%	hj	-%	hj	hjnp	hj	hj		hj	
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s		25%	26%	48%	10%	32%	34%	24%	100%	57%	43%	-%	57%	-%	58%	49%	58%	53%	4%	58%	

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 15**

**A2A. Can you specify whether you use ISDN2/2e for the following business uses? (MULTI CODE)**

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											ANY IP
	Total	1-49	50-249	250+	UNDER £1M	£1M- £20M	£21M-£10 0M	OVER £100M	ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP SWITCHED ISDN	IP NOT SWITCHED ISDN	
Significance Level: 95%		*a	b	c	*d	e	f	g	h	i	j	*k	l	*m	n	o	p	q	*r	s
Unweighted total	141	23	32	86	19	39	43	37	141	61	80	-	61	-	67	43	67	53	12	67
Effective Weighted Sample	98	19	31	79	13	28	37	32	98	60	49	-	60	-	55	42	55	44	10	55
Total	139	46	40	53	29	43	35	28	139	52	87	-	52	-	57	37	57	47	9	57
		33%	29%	38%	21%	31%	25%	20%	100%	37%	63%	-%	37%	-%	41%	27%	41%	33%	7%	41%
Video conferencing	60	11	23	27	10	11	23	17	60	29	32	-	29	-	31	23	31	25	5	31
	43%	23%	56%	51%	34%	26%	65%	60%	43%	55%	36%	-%	55%	-%	54%	62%	54%	55%	53%	54%
		18%	37%	45%	16%	19%	e 37%	e 27%	100%	47%	53%	-%	47%	-%	51%	hj 38%	51%	42%	8%	51%
Card payments	53	10	11	32	6	9	20	17	53	35	18	-	35	-	36	27	36	31	5	36
	38%	21%	27%	61%	19%	20%	58%	63%	38%	67%	20%	-%	67%	-%	63%	74%	63%	66%	53%	63%
		18%	21%	b 61%	11%	17%	e 39%	e 33%	j 100%	hj 66%	34%	-%	66%	-%	hj 69%	hj 52%	hj 69%	hj 58%	10%	69%
Don't know	2	-	1	1	-	2	-	*	2	-	2	-	-	-	-	-	-	-	-	-
	2%	-%	3%	2%	-%	4%	-%	2%	2%	-%	3%	-%	-%	-%	-%	-%	-%	-%	-%	-%
		-%	63%	38%	-%	81%	-%	19%	100%	-%	100%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 15**

**A2A. Can you specify whether you use ISDN2/2e for the following business uses? (MULTI CODE)**

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
Significance Level: 95%		a	*b	*c	d	e	f	*g	h	*i	j	k	l	*m	n	o	p	q
Unweighted total	141	123	18	-	88	53	33	28	42	25	105	36	94	11	58	83	43	94
Effective Weighted Sample	98	83	18	-	60	37	32	28	34	21	77	22	72	7	42	56	27	81
Total	139	124	16	-	82	57	28	24	38	20	103	37	88	15	62	77	57	80
		89%	11%	-%	59%	41%	20%	17%	27%	14%	74%	26%	63%	11%	45%	55%	41%	57%
Incoming calls	105	94	11	-	66	39	26	18	34	16	77	28	66	11	44	61	44	61
	75%	76%	68%	-%	80%	69%	94%	76%	91%	83%	75%	77%	75%	75%	71%	79%	77%	77%
		90%	10%	-%	63%	37%	25%	17%	33%	16%	73%	27%	63%	11%	42%	58%	42%	58%
Outgoing calls	97	92	6	-	63	34	18	16	28	16	70	27	58	12	40	57	43	52
	70%	74%	35%	-%	77%	60%	64%	64%	75%	79%	68%	74%	66%	85%	64%	74%	77%	66%
		94%	6%	-%	65%	35%	19%	16%	29%	16%	72%	28%	59%	13%	41%	59%	45%	54%
Internet services	96	85	10	-	63	32	21	16	30	11	66	30	58	7	37	59	34	59
	69%	69%	67%	-%	77%	57%	76%	67%	79%	56%	64%	82%	66%	49%	59%	76%	61%	74%
		89%	11%	-%	66%	34%	22%	17%	31%	12%	69%	31%	61%	7%	38%	62%	36%	62%
Fax services	86	76	10	-	49	37	21	16	29	8	64	22	52	12	33	53	37	48
	62%	61%	67%	-%	59%	66%	76%	65%	76%	42%	62%	62%	59%	82%	53%	69%	65%	60%
		88%	12%	-%	57%	43%	25%	18%	33%	10%	74%	26%	60%	14%	38%	62%	43%	56%
Calls between different sites	75	66	9	-	47	28	18	16	25	16	58	16	53	5	31	44	25	48
	54%	54%	55%	-%	57%	49%	66%	65%	66%	79%	57%	45%	61%	36%	50%	57%	44%	60%
		89%	11%	-%	63%	37%	25%	21%	33%	21%	78%	22%	71%	7%	41%	59%	34%	64%
Data services	71	59	12	-	51	20	20	17	27	12	57	14	54	3	30	41	13	57
	51%	48%	77%	-%	61%	35%	72%	71%	72%	63%	55%	38%	62%	18%	48%	53%	24%	71%
		83%	17%	-%	72%	28%	28%	24%	38%	18%	80%	20%	77%	4%	42%	58%	19%	81%
Security/alarm systems	62	52	10	-	42	20	19	16	24	12	50	12	44	6	24	38	20	41
	44%	42%	63%	-%	51%	36%	67%	68%	64%	59%	48%	33%	50%	39%	38%	50%	34%	51%
		84%	16%	-%	67%	33%	30%	26%	39%	19%	80%	20%	71%	9%	38%	62%	32%	66%
Video conferencing	60	51	10	-	37	23	17	12	24	7	46	14	45	1	23	37	20	40
	43%	41%	62%	-%	45%	41%	61%	48%	64%	35%	45%	38%	52%	5%	38%	48%	35%	51%
		84%	16%	-%	61%	39%	28%	19%	40%	11%	77%	23%	75%	1%	39%	61%	33%	67%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 15

A2A. Can you specify whether you use ISDN2/2e for the following business uses? (MULTI CODE)

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	*b	*c	d	e	f	*g	h	*i	j	k	l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	141	123	18	-	88	53	33	28	42	25	105	36	94	11	58	83	43	94
Effective Weighted Sample	98	83	18	-	60	37	32	28	34	21	77	22	72	7	42	56	27	81
Total	139	124	16	-	82	57	28	24	38	20	103	37	88	15	62	77	57	80
		89%	11%	-%	59%	41%	20%	17%	27%	14%	74%	26%	63%	11%	45%	55%	41%	57%
Card payments	53	44	9	-	38	15	19	16	24	12	44	8	43	1	24	28	14	39
	38%	36%	55%	-%	46%	26%	69%	64%	63%	63%	43%	22%	49%	8%	39%	37%	24%	49%
		84%	16%	-%	e 72%	e 28%	de 37%	e 29%	e 45%	e 24%	85%	15%	82%	2%	46%	54%	p 26%	p 74%
Don't know	2	2	-	-	*	2	-	-	-	-	2	*	1	*	-	2	1	-
	2%	2%	-%	-%	1%	3%	-%	-%	-%	-%	2%	1%	2%	3%	-%	3%	2%	-%
		100%	-%	-%	19%	81%	-%	-%	-%	-%	81%	19%	63%	19%	-%	100%	63%	-%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 15

A2A. Can you specify whether you use ISDN2/2e for the following business uses? (MULTI CODE)

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	Total	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
		LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%		*a	b	c	d	e	f	*g	h	i	j	*k	l	m	n	*o	p	q	*r
Unweighted total	141	27	81	33	93	33	55	19	104	30	63	11	37	45	37	22	44	50	17
Effective Weighted Sample	98	19	63	19	67	20	35	13	74	21	42	6	29	41	33	16	39	41	14
Total	139	27	76	37	91	33	56	25	103	26	69	13	33	36	30	21	36	43	14
		19%	54%	26%	65%	23%	41%	18%	74%	19%	50%	9%	24%	26%	21%	15%	26%	31%	10%
Incoming calls	105	20	53	32	65	28	35	19	75	22	42	12	30	33	26	18	32	38	13
	75%	76%	70%	86%	72%	87%	61%	77%	72%	84%	61%	93%	92%	92%	87%	87%	89%	87%	93%
		19%	51%	30%	62%	27%	33%	19%	71%	21%	40%	11%	29%	32%	25%	17%	31%	36%	12%
Outgoing calls	97	18	48	31	59	27	32	21	67	22	41	12	25	25	23	17	27	32	12
	70%	67%	63%	85%	65%	83%	57%	83%	65%	84%	60%	93%	76%	70%	77%	81%	74%	74%	84%
		19%	49%	32%	61%	28%	33%	21%	69%	22%	43%	12%	26%	26%	24%	17%	28%	33%	12%
Internet services	96	23	45	28	61	24	36	19	69	20	46	9	25	31	23	12	28	30	10
	69%	85%	59%	77%	67%	73%	63%	77%	67%	78%	67%	68%	75%	86%	77%	59%	77%	70%	74%
		24%	47%	29%	64%	25%	37%	20%	72%	21%	49%	9%	26%	32%	24%	13%	29%	32%	11%
Fax services	86	20	47	20	63	18	33	16	65	17	44	5	25	25	20	15	23	31	6
	62%	73%	62%	54%	69%	55%	59%	63%	63%	68%	63%	43%	78%	69%	66%	71%	62%	71%	46%
		23%	54%	23%	73%	21%	39%	18%	76%	20%	51%	6%	30%	29%	23%	17%	26%	36%	7%
Calls between different sites	75	19	41	15	49	16	24	10	52	21	32	3	23	28	21	14	26	28	12
	54%	73%	54%	40%	54%	50%	43%	39%	50%	81% h	46%	21%	70%	79%	72%	69%	73%	65%	88%
		26%	54%	20%	65%	22%	32%	13%	70%	28%	42%	4%	31%	38%	29%	19%	35%	38%	17%
Data services	71	18	40	12	52	12	25	6	53	17	29	2	24	28	24	13	26	31	9
	51%	69%	53%	34%	57%	38%	44%	25%	51%	67%	42%	15%	73%	78%	81%	63%	72%	71%	64%
		26%	56%	18%	73%	17%	35%	9%	75%	25%	41%	3%	34%	40%	34%	18%	37%	43%	13%
Security/alarm systems	62	17	32	13	45	14	18	8	48	11	23	4	24	27	19	12	23	31	5
	44%	63%	43%	35%	50%	43%	32%	32%	46%	42%	33%	28%	73%	75%	63%	59%	64%	72%	33%
		27%	52%	20%	73%	23%	29%	13%	77%	17%	36%	6%	39%	44%	30%	20%	38%	50%	8%
Video conferencing	60	17	32	11	45	10	20	10	44	16	28	2	19	22	20	11	20	25	6
	43%	64%	42%	31%	50%	31%	35%	38%	42%	63%	40%	15%	57%	62%	67%	52%	54%	57%	44%
		29%	53%	19%	75%	17%	33%	16%	72%	27%	46%	3%	31%	37%	33%	18%	33%	41%	10%
Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																			

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 15

A2A. Can you specify whether you use ISDN2/2e for the following business uses? (MULTI CODE)

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%		*a	b	c	d	e	f	*g	h	i	j	*k	l	m	n	*o	p	q	*r
Unweighted total	141	27	81	33	93	33	55	19	104	30	63	11	37	45	37	22	44	50	17
Effective Weighted Sample	98	19	63	19	67	20	35	13	74	21	42	6	29	41	33	16	39	41	14
Total	139	27	76	37	91	33	56	25	103	26	69	13	33	36	30	21	36	43	14
		19%	54%	26%	65%	23%	41%	18%	74%	19%	50%	9%	24%	26%	21%	15%	26%	31%	10%
Card payments	53	19	26	7	42	8	15	2	40	12	15	1	22	24	21	12	24	30	6
	38%	71%	35%	20%	47%	24%	26%	7%	39%	47%	22%	12%	67%	67%	69%	57%	66%	68%	46%
		36%	50%	14%	80%	15%	28%	3%	76%	23%	29%	3%	42%	46%	39%	22%	45%	56%	12%
Don't know	2	*	-	2	*	-	2	*	*	-	2	*	-	-	-	-	-	-	-
	2%	2%	-%	5%	*%	-%	3%	2%	*%	-%	3%	3%	-%	-%	-%	-%	-%	-%	-%
		19%	-%	81%	19%	-%	81%	19%	19%	-%	81%	19%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 16**

**A2B. Can you specify whether you use ISDN30 for the following business uses? (MULTI CODE)**

Base : Those who use ISN30 (and mostly use an ISDN service)

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION												
	Total	1-49 *a	50-249 b	250+ c	UNDER				ISDN2 h	ISDN30 i	ISDN2 ONLY *j	ISDN30 ONLY k	BOTH ISDN l	IP NOT ISDN *m	ISDN2 & IP n	ISDN30 & IP o	ISDN & IP p	IP SWITCHED		IP NOT	ANY IP s
					£1M *d	£1M- £20M e	£21M-£10 0M f	OVER £100M g										ISDN q	ISDN *r		
Significance Level: 95%																					
Unweighted total	137	25	32	79	16	37	45	37	61	137	-	76	61	-	43	61	61	52	8	61	
Effective Weighted Sample	133	25	32	79	16	36	44	36	60	133	-	74	60	-	42	60	60	51	8	60	
Total	122	26 22%	33 27%	62 51%	16 13%	35 29%	41 33%	29 24%	52 43%	122 100%	- -%	70 57%	52 43%	- -%	37 30%	54 45%	54 45%	47 38%	7 6%	54 45%	
Incoming calls	81 66%	16 60%	25 75%	40 65%	8 52%	17 50%	30 73%	25 86%	34 66%	81 66%	- -%	46 67%	34 66%	- -%	28 77%	43 78%	43 78%	36 77%	7 100%	43 78%	
		20%	31%	50%	10%	22%	e 37%	e 31%	43%	100%	-%	57%	43%	-%	35%	53%	53%	45%	8%	53%	
Internet services	75 62%	15 56%	23 69%	38 61%	9 59%	17 49%	29 72%	19 66%	39 74%	75 62%	- -%	37 53%	39 74%	- -%	29 78%	40 73%	40 73%	35 75%	5 74%	40 73%	
		20%	30%	50%	12%	23%	e 39%	e 25%	51%	100%	-%	49%	k 51%	-%	k 38%	k 53%	k 53%	k 46%	k 7%	k 53%	
Outgoing calls	75 62%	17 64%	18 53%	41 66%	8 48%	18 52%	25 61%	24 83%	30 57%	75 62%	- -%	45 65%	30 57%	- -%	26 70%	37 67%	37 67%	31 66%	6 88%	37 67%	
		22%	23%	54%	10%	24%	33%	ef 32%	40%	100%	-%	60%	40%	-%	34%	49%	49%	41%	8%	49%	
Security/alarm systems	70 58%	10 40%	26 78%	34 54%	7 44%	15 44%	27 67%	20 70%	35 68%	70 58%	- -%	35 50%	35 68%	- -%	30 80%	39 71%	39 71%	33 71%	4 62%	39 71%	
		15%	37%	48%	10%	22%	e 38%	e 28%	50%	100%	-%	50%	k 50%	-%	ik 42%	k 55%	k 55%	k 48%	k 6%	k 55%	
Card payments	66 54%	15 56%	18 53%	34 54%	6 40%	18 51%	21 53%	20 69%	36 69%	66 54%	- -%	30 44%	36 69%	- -%	27 74%	39 71%	39 71%	32 69%	6 85%	39 71%	
		22%	26%	51%	10%	27%	32%	k 30%	54%	100%	-%	46%	k 54%	-%	ik 41%	ik 59%	ik 59%	k 48%	9%	59%	
Calls between different sites	62 51%	9 36%	18 53%	36 57%	7 44%	14 41%	20 49%	21 72%	32 61%	62 51%	- -%	31 44%	32 61%	- -%	27 75%	37 68%	37 68%	32 69%	4 58%	37 68%	
		15%	28%	57%	11%	23%	32%	ef 33%	51%	100%	-%	49%	51%	-%	ik 44%	ik 59%	ik 59%	ik 51%	6%	59%	
Data services	62 51%	4 16%	20 59%	39 62%	5 32%	10 29%	24 60%	22 77%	33 64%	62 51%	- -%	29 42%	33 64%	- -%	27 74%	40 74%	40 74%	34 74%	6 85%	40 74%	
		7%	31%	62%	8%	16%	e 39%	e 35%	k 53%	100%	-%	47%	k 53%	-%	ik 44%	ik 64%	ik 64%	ik 55%	9%	64%	
Columns Tested:	a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																				

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s



# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 16**

**A2B. Can you specify whether you use ISDN30 for the following business uses? (MULTI CODE)**

Base : Those who use ISN30 (and mostly use an ISDN service)

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP SWITCHED	IP NOT SWITCHED	ANY IP
					£1M	£1M-£20M	£21M-£100M	£100M										ISDN	ISDN	
Significance Level: 95%		*a	b	c	*d	e	f	g	h	i	*j	k	l	*m	n	o	p	q	*r	s
Unweighted total	137	25	32	79	16	37	45	37	61	137	-	76	61	-	43	61	61	52	8	61
Effective Weighted Sample	133	25	32	79	16	36	44	36	60	133	-	74	60	-	42	60	60	51	8	60
Total	122	26	33	62	16	35	41	29	52	122	-	70	52	-	37	54	54	47	7	54
		22%	27%	51%	13%	29%	33%	24%	43%	100%	-%	57%	43%	-%	30%	45%	45%	38%	6%	45%
Fax services	56	8	13	35	5	10	19	21	30	56	-	26	30	-	28	34	34	30	4	34
	46%	29%	41%	56%	33%	27%	46%	74%	57%	46%	-%	37%	57%	-%	75%	63%	63%	65%	58%	63%
								ef	k				k		ik	ik	ik	ik		ik
		14%	24%	62%	9%	17%	34%	38%	54%	100%	-%	46%	54%	-%	50%	62%	62%	55%	7%	62%
Video conferencing	52	7	13	32	5	7	22	18	27	52	-	26	27	-	22	32	32	27	5	32
	43%	28%	41%	51%	32%	20%	55%	63%	52%	43%	-%	37%	52%	-%	59%	58%	58%	58%	70%	58%
							e	e							k	k	k	k		k
		14%	26%	60%	10%	14%	42%	35%	51%	100%	-%	49%	51%	-%	42%	60%	60%	51%	9%	60%
Columns Tested:	a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																			

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 16

A2B. Can you specify whether you use ISDN30 for the following business uses? (MULTI CODE)

Base : Those who use ISN30 (and mostly use an ISDN service)

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN30			ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		ISDN2	ISDN30	IP														
Significance Level: 95%		a	b	*c	d	*e	f	g	h	*i	j	k	l	*m	n	o	p	q
Unweighted total	137	43	94	-	40	21	83	54	40	21	105	32	94	11	66	71	40	94
Effective Weighted Sample	133	42	91	-	40	21	80	53	39	21	103	30	92	11	64	70	38	93
Total	122	36	85	-	33	19	73	49	36	19	93	29	84	9	60	61	38	81
		30%	70%	-%	27%	15%	60%	40%	29%	15%	76%	24%	69%	8%	50%	50%	31%	66%
Incoming calls	81	26	55	-	24	11	57	24	30	12	64	17	59	5	32	48	20	58
	66%	70%	65%	-%	71%	58%	78%	49%	85%	67%	69%	58%	70%	57%	54%	79%	52%	72%
		32%	68%	-%	g	13%	g	29%	g	15%	79%	21%	73%	7%	40%	n	p	72%
Internet services	75	28	47	-	25	13	51	25	29	10	60	15	58	2	33	42	20	55
	62%	77%	55%	-%	76%	71%	69%	51%	82%	56%	65%	52%	69%	26%	55%	69%	51%	68%
		b			g		g		g									
		37%	63%	-%	33%	18%	67%	33%	39%	14%	80%	20%	77%	3%	44%	56%	26%	73%
Outgoing calls	75	25	50	-	24	6	50	25	24	12	57	18	52	5	30	45	23	49
	62%	69%	59%	-%	72%	31%	69%	52%	68%	65%	61%	64%	62%	51%	50%	73%	61%	61%
		33%	67%	-%	g	8%	67%	33%	32%	16%	76%	24%	69%	6%	40%	n	31%	65%
Security/alarm systems	70	24	46	-	24	12	42	28	28	11	58	12	52	6	37	33	19	51
	58%	67%	54%	-%	71%	62%	57%	58%	78%	57%	63%	41%	63%	66%	61%	54%	49%	64%
		35%	65%	-%	34%	17%	60%	40%	40%	15%	83%	17%	75%	9%	52%	48%	27%	73%
Card payments	66	25	41	-	20	15	37	29	27	12	53	13	51	2	34	33	19	46
	54%	68%	49%	-%	62%	82%	51%	60%	75%	65%	57%	45%	61%	26%	56%	53%	50%	57%
		b							f									
		37%	63%	-%	31%	23%	56%	44%	40%	18%	80%	20%	77%	4%	51%	49%	29%	69%
Calls between different sites	62	22	41	-	21	10	40	22	27	10	53	9	49	4	31	32	18	42
	51%	60%	48%	-%	65%	54%	55%	45%	76%	53%	57%	33%	59%	43%	51%	52%	48%	53%
		35%	65%	-%	34%	16%	65%	35%	44%	16%	85%	15%	79%	6%	49%	51%	29%	68%
Data services	62	22	40	-	23	10	39	23	27	13	52	11	49	3	30	32	15	48
	51%	61%	47%	-%	69%	53%	54%	48%	76%	70%	56%	37%	58%	34%	50%	52%	39%	59%
		35%	65%	-%	g				fg								p	
					37%	16%	63%	37%	43%	21%	83%	17%	78%	5%	48%	52%	24%	76%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 16

A2B. Can you specify whether you use ISDN30 for the following business uses? (MULTI CODE)

Base : Those who use ISN30 (and mostly use an ISDN service)

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN30			ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		ISDN2	b	IP														
Significance Level: 95%	a	b	*c	d	*e	f	g	h	*i	j	k	l	*m	n	o	p	q	
Unweighted total	137	43	94	-	40	21	83	54	40	21	105	32	94	11	66	71	40	94
Effective Weighted Sample	133	42	91	-	40	21	80	53	39	21	103	30	92	11	64	70	38	93
Total	122	36	85	-	33	19	73	49	36	19	93	29	84	9	60	61	38	81
		30%	70%	-%	27%	15%	60%	40%	29%	15%	76%	24%	69%	8%	50%	50%	31%	66%
Fax services	56	23	32	-	23	7	37	19	26	9	48	7	42	6	25	31	14	42
	46%	64%	38%	-%	69%	37%	50%	39%	72%	46%	52%	26%	51%	66%	41%	51%	36%	52%
		b			fg				fg		k							
		42%	58%	-%	41%	12%	66%	34%	46%	15%	87%	13%	76%	11%	44%	56%	24%	76%
Video conferencing	52	20	33	-	19	8	35	17	23	9	48	4	42	6	25	28	11	40
	43%	54%	38%	-%	57%	42%	48%	36%	65%	46%	52%	14%	50%	66%	41%	45%	30%	50%
					g				g		k						p	
		38%	62%	-%	36%	15%	67%	33%	44%	16%	92%	8%	80%	12%	47%	53%	21%	77%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 16

A2B. Can you specify whether you use ISDN30 for the following business uses? (MULTI CODE)

Base : Those who use ISN30 (and mostly use an ISDN service)

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
															UP TO	OVER			
	Total	LAST YEAR	EVER	NEVER	YES	NO	YES	NO/DK	3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	2 YEARS	2 YEARS	YES	NO/DK
		*a	b	/DK															
Significance Level: 95%																			
Unweighted total	137	26	83	28	95	29	59	17	102	32	64	12	34	47	31	25	36	48	13
Effective Weighted Sample	133	26	80	27	92	28	57	17	99	31	62	12	33	46	30	25	35	47	13
Total	122	22	74	25	83	26	51	16	91	28	56	11	30	42	27	23	31	43	12
		18%	61%	21%	68%	21%	42%	13%	74%	23%	46%	9%	25%	34%	22%	19%	26%	35%	10%
Incoming calls	81	19	42	20	52	19	26	12	57	20	30	8	27	34	23	17	25	33	10
	66%	86%	56%	79%	63%	72%	51%	74%	63%	72%	52%	78%	89%	81%	84%	75%	81%	77%	82%
		24%	52%	25%	65%	23%	32%	15%	71%	25%	37%	10%	33%	42%	28%	22%	31%	41%	12%
Internet services	75	19	42	15	55	13	26	10	58	14	30	6	25	32	22	15	24	34	6
	62%	86%	56%	58%	67%	51%	51%	60%	64%	51%	53%	54%	82%	76%	80%	67%	78%	79%	51%
		25%	55%	19%	73%	18%	34%	13%	77%	19%	39%	8%	33%	42%	29%	21%	32%	45%	8%
Outgoing calls	75	17	37	21	47	20	27	12	53	20	31	8	25	26	19	18	19	29	8
	62%	77%	50%	83%	56%	78%	53%	72%	59%	70%	54%	76%	84%	62%	69%	77%	60%	67%	69%
		23%	49%	28%	62%	27%	36%	16%	71%	26%	41%	11%	m 33%	34%	25%	24%	25%	38%	11%
Security/alarm systems	70	14	44	12	54	10	25	7	50	19	28	4	23	29	23	14	25	32	6
	58%	62%	60%	48%	65%	39%	48%	43%	56%	66%	49%	34%	77%	69%	84%	60%	79%	76%	54%
		20%	63%	17%	77%	15%	35%	10%	72%	27%	40%	5%	33%	41%	32%	20%	35%	46%	9%
Card payments	66	17	38	12	48	11	22	5	53	11	24	4	25	30	20	18	21	32	7
	54%	74%	51%	46%	58%	43%	44%	31%	59%	39%	42%	35%	84%	71%	75%	76%	68%	74%	60%
		25%	57%	18%	73%	17%	34%	8%	80%	17%	36%	6%	38%	45%	31%	27%	32%	48%	11%
Calls between different sites	62	13	39	10	44	12	21	4	47	15	21	4	22	27	19	18	19	29	8
	51%	60%	53%	39%	53%	45%	41%	27%	52%	53%	38%	39%	73%	65%	70%	78%	61%	68%	69%
		21%	63%	16%	71%	19%	34%	7%	75%	24%	34%	7%	35%	43%	30%	29%	30%	46%	13%
Data services	62	16	35	11	47	12	18	5	48	14	22	1	24	33	24	14	26	33	7
	51%	72%	48%	44%	56%	46%	35%	28%	53%	50%	38%	7%	80%	79%	87%	63%	82%	77%	60%
		26%	56%	18%	75%	19%	28%	7%	76%	22%	35%	1%	38%	53%	38%	23%	41%	53%	11%
Fax services	56	16	31	9	43	8	15	6	41	14	19	3	19	26	22	11	23	30	5
	46%	72%	42%	35%	52%	29%	30%	38%	45%	49%	33%	25%	64%	64%	82%	49%	73%	69%	41%
		29%	56%	16%	78%	14%	27%	11%	73%	25%	33%	5%	34%	48%	40%	20%	41%	53%	8%
Columns Tested:	a.b.c - d.e - f.g - h.i - j.k - l.m.n - o.p - q.r																		

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 16

A2B. Can you specify whether you use ISDN30 for the following business uses? (MULTI CODE)

Base : Those who use ISN30 (and mostly use an ISDN service)

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
	LAST YEAR	EVER	/DK	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK	
Significance Level: 95%	*a	b	*c	d	*e	f	*g	h	i	j	*k	l	m	n	*o	p	q	*r	
Unweighted total	137	26	83	28	95	29	59	17	102	32	64	12	34	47	31	25	36	48	13
Effective Weighted Sample	133	26	80	27	92	28	57	17	99	31	62	12	33	46	30	25	35	47	13
Total	122	22	74	25	83	26	51	16	91	28	56	11	30	42	27	23	31	43	12
		18%	61%	21%	68%	21%	42%	13%	74%	23%	46%	9%	25%	34%	22%	19%	26%	35%	10%
Video conferencing	52	15	30	8	42	8	15	5	40	12	20	1	18	26	21	12	20	27	5
	43%	66%	40%	31%	50%	31%	30%	33%	44%	42%	35%	7%	60%	61%	77%	51%	63%	62%	43%
		28%	57%	15%	80%	15%	29%	10%	76%	23%	38%	2%	35%	49%	40%	23%	38%	51%	9%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 17

A3AA. Please rank the functions for which your company uses ISDN2/2e in order of importance? FIRST MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN SWITCHED	IP NOT SWITCHED	ANY IP	
					£1M	£1M-£20M	£21M-£100M	OVER £100M												
Significance Level: 95%		*a	b	c	*d	e	f	g	h	i	j	*k	l	*m	n	o	p	q	*r	s
Unweighted total	141	23	32	86	19	39	43	37	141	61	80	-	61	-	67	43	67	53	12	67
Effective Weighted Sample	98	19	31	79	13	28	37	32	98	60	49	-	60	-	55	42	55	44	10	55
Total	139	46	40	53	29	43	35	28	139	52	87	-	52	-	57	37	57	47	9	57
		33%	29%	38%	21%	31%	25%	20%	100%	37%	63%	-%	37%	-%	41%	27%	41%	33%	7%	41%
Incoming calls	58	22	10	26	16	16	12	14	58	24	34	-	24	-	27	19	27	24	4	27
	42%	48%	24%	50%	56%	37%	34%	52%	42%	46%	39%	-%	46%	-%	48%	52%	48%	51%	41%	48%
			b																	
		38%	17%	45%	28%	28%	20%	24%	100%	41%	59%	-%	41%	-%	47%	33%	47%	40%	7%	47%
Outgoing calls	25	12	9	4	7	6	6	6	25	7	18	-	7	-	11	4	11	7	4	11
	18%	26%	22%	8%	24%	14%	18%	21%	18%	14%	21%	-%	14%	-%	19%	10%	19%	16%	38%	19%
			c																	
		48%	36%	16%	28%	24%	25%	23%	100%	29%	71%	-%	29%	-%	44%	15%	44%	30%	14%	44%
Internet services	24	8	10	7	-	11	7	3	24	8	16	-	8	-	8	6	8	6	2	8
	17%	16%	24%	13%	-%	25%	19%	10%	17%	15%	19%	-%	15%	-%	13%	15%	13%	13%	17%	13%
		32%	40%	28%	-%	44%	28%	12%	100%	33%	67%	-%	33%	-%	31%	24%	31%	25%	7%	31%
Calls between different sites	14	4	5	4	5	4	3	2	14	5	9	-	5	-	5	4	5	4	*	5
	10%	9%	13%	8%	16%	10%	9%	7%	10%	10%	10%	-%	10%	-%	9%	10%	9%	9%	4%	9%
		30%	38%	32%	33%	31%	22%	15%	100%	38%	62%	-%	38%	-%	39%	26%	39%	29%	3%	39%
Fax services	5	-	2	3	-	2	2	1	5	3	3	-	3	-	1	1	1	1	-	1
	4%	-%	6%	5%	-%	4%	6%	3%	4%	5%	3%	-%	5%	-%	2%	2%	2%	3%	-%	2%
		-%	46%	54%	-%	34%	43%	15%	100%	50%	50%	-%	50%	-%	23%	15%	23%	23%	-%	23%
Data services	5	-	1	4	*	-	4	1	5	2	3	-	2	-	2	2	2	2	-	2
	4%	-%	3%	7%	1%	-%	11%	3%	4%	5%	3%	-%	5%	-%	3%	4%	3%	4%	-%	3%
		-%	28%	72%	8%	-%	76%	16%	100%	47%	53%	-%	47%	-%	40%	31%	40%	40%	-%	40%
Security/alarm systems	3	-	1	1	1	2	-	-	3	1	2	-	1	-	1	1	1	1	-	1
	2%	-%	3%	2%	3%	4%	-%	-%	2%	2%	2%	-%	2%	-%	1%	2%	1%	2%	-%	1%
		-%	54%	46%	30%	70%	-%	-%	100%	30%	70%	-%	30%	-%	30%	30%	30%	30%	-%	30%
Card payments	1	-	-	1	-	-	*	1	1	1	*	-	1	-	1	1	1	1	-	1
	1%	-%	-%	2%	-%	-%	1%	3%	1%	2%	-%	-%	2%	-%	1%	2%	1%	2%	-%	1%
		-%	-%	100%	-%	-%	35%	65%	100%	65%	35%	-%	65%	-%	65%	65%	65%	65%	-%	65%

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 17

A3AA. Please rank the functions for which your company uses ISDN2/2e in order of importance? FIRST MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30		IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN SWITCHED	IP NOT SWITCHED	ANY IP	
					£1M	£1M-£20M	£21M-£100M	OVER £100M				ONLY	BOTH							
Significance Level: 95%		*a	b	c	*d	e	f	g	h	i	j	*k	l	*m	n	o	p	q	*r	s
Unweighted total	141	23	32	86	19	39	43	37	141	61	80	-	61	-	67	43	67	53	12	67
Effective Weighted Sample	98	19	31	79	13	28	37	32	98	60	49	-	60	-	55	42	55	44	10	55
Total	139	46	40	53	29	43	35	28	139	52	87	-	52	-	57	37	57	47	9	57
		33%	29%	38%	21%	31%	25%	20%	100%	37%	63%	-%	37%	-%	41%	27%	41%	33%	7%	41%
Video conferencing	1	-	-	1	-	1	*	-	1	1	*	-	1	-	1	1	1	1	-	1
	1%	-%	-%	2%	-%	2%	1%	-%	1%	2%	*%	-%	2%	-%	2%	2%	2%	2%	-%	2%
		-%	-%	100%	-%	65%	35%	-%	100%	65%	35%	-%	65%	-%	100%	65%	100%	65%	-%	100%
Don't know	2	-	1	1	-	2	-	*	2	-	2	-	-	-	-	-	-	-	-	-
	2%	-%	3%	2%	-%	4%	-%	2%	2%	-%	3%	-%	-%	-%	-%	-%	-%	-%	-%	-%
		-%	63%	38%	-%	81%	-%	19%	100%	-%	100%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 17

A3AA. Please rank the functions for which your company uses ISDN2/2e in order of importance? FIRST MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN30			ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		ISDN2	*b	IP														
Significance Level: 95%		a	*b	*c	d	e	f	*g	h	*i	j	k	l	*m	n	o	p	q
Unweighted total	141	123	18	-	88	53	33	28	42	25	105	36	94	11	58	83	43	94
Effective Weighted Sample	98	83	18	-	60	37	32	28	34	21	77	22	72	7	42	56	27	81
Total	139	124	16	-	82	57	28	24	38	20	103	37	88	15	62	77	57	80
		89%	11%	-%	59%	41%	20%	17%	27%	14%	74%	26%	63%	11%	45%	55%	41%	57%
Incoming calls	58	52	6	-	39	19	14	10	18	10	41	17	34	7	24	35	26	33
	42%	42%	38%	-%	47%	34%	52%	40%	48%	48%	40%	47%	39%	51%	39%	45%	45%	41%
		90%	10%	-%	67%	33%	25%	17%	31%	16%	71%	29%	58%	13%	41%	59%	44%	56%
Outgoing calls	25	24	1	-	13	12	3	4	9	2	22	3	21	1	12	13	9	14
	18%	20%	5%	-%	16%	21%	12%	16%	23%	12%	21%	9%	23%	10%	19%	17%	17%	18%
		97%	3%	-%	52%	48%	13%	16%	34%	10%	87%	13%	82%	6%	47%	53%	37%	57%
Internet services	24	21	4	-	15	10	6	2	5	2	18	6	13	5	10	14	7	17
	17%	17%	23%	-%	18%	17%	22%	8%	14%	11%	18%	17%	15%	34%	16%	18%	12%	21%
		85%	15%	-%	60%	40%	26%	8%	22%	9%	74%	26%	54%	20%	41%	59%	29%	69%
Calls between different sites	14	11	3	-	5	9	1	4	1	4	8	6	8	-	7	7	7	6
	10%	9%	18%	-%	6%	15%	3%	18%	3%	22%	8%	16%	9%	-%	12%	9%	13%	8%
		80%	20%	-%	38%	62%	6%	32%	8%	32%	58%	42%	58%	-%	52%	48%	54%	46%
Fax services	5	5	-	-	3	2	2	1	1	*	5	-	5	-	3	2	*	5
	4%	4%	-%	-%	4%	4%	6%	4%	2%	2%	5%	-%	6%	-%	5%	3%	1%	6%
		100%	-%	-%	58%	42%	30%	20%	15%	8%	100%	-%	100%	-%	62%	38%	8%	92%
Data services	5	4	1	-	5	*	1	2	2	-	3	2	3	-	3	2	3	2
	4%	3%	5%	-%	6%	1%	3%	7%	5%	-%	3%	4%	4%	-%	5%	2%	5%	3%
		84%	16%	-%	92%	8%	16%	31%	40%	-%	68%	32%	68%	-%	68%	32%	52%	48%
Security/alarm systems	3	2	1	-	-	3	-	1	-	1	*	2	-	*	1	1	1	1
	2%	1%	5%	-%	-%	5%	-%	3%	-%	4%	*%	6%	-%	3%	2%	2%	2%	2%
		70%	30%	-%	-%	100%	-%	30%	-%	30%	16%	84%	-%	16%	46%	54%	46%	54%
Card payments	1	1	-	-	1	-	-	1	1	-	1	-	1	-	1	-	*	1
	1%	1%	-%	-%	1%	-%	-%	3%	2%	-%	1%	-%	1%	-%	2%	-%	1%	1%
		100%	-%	-%	100%	-%	-%	65%	65%	-%	100%	-%	100%	-%	100%	-%	35%	65%
Video conferencing	1	*	1	-	1	-	1	-	1	-	1	-	1	-	-	1	1	-
	1%	*%	5%	-%	1%	-%	3%	-%	3%	-%	1%	-%	1%	-%	-%	2%	2%	-%
		35%	65%	-%	100%	-%	65%	-%	100%	-%	100%	-%	100%	-%	-%	100%	100%	-%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q



# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 17

A3AA. Please rank the functions for which your company uses ISDN2/2e in order of importance? FIRST MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
Significance Level: 95%		a	*b	*c	d	e	f	*g	h	*i	j	k	l	*m	n	o	p	q
Unweighted total	141	123	18	-	88	53	33	28	42	25	105	36	94	11	58	83	43	94
Effective Weighted Sample	98	83	18	-	60	37	32	28	34	21	77	22	72	7	42	56	27	81
Total	139	124	16	-	82	57	28	24	38	20	103	37	88	15	62	77	57	80
		89%	11%	-%	59%	41%	20%	17%	27%	14%	74%	26%	63%	11%	45%	55%	41%	57%
Don't know	2	2	-	-	*	2	-	-	-	-	2	*	1	*	-	2	1	-
	2%	2%	-%	-%	1%	3%	-%	-%	-%	-%	2%	1%	2%	3%	-%	3%	2%	-%
		100%	-%	-%	19%	81%	-%	-%	-%	-%	81%	19%	63%	19%	-%	100%	63%	-%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 17

A3AA. Please rank the functions for which your company uses ISDN2/2e in order of importance? FIRST MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
	Total	NEVER			YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
		LAST YEAR	EVER	/DK															
Significance Level: 95%		*a	b	c	d	e	f	*g	h	i	j	*k	l	m	n	*o	p	q	*r
Unweighted total	141	27	81	33	93	33	55	19	104	30	63	11	37	45	37	22	44	50	17
Effective Weighted Sample	98	19	63	19	67	20	35	13	74	21	42	6	29	41	33	16	39	41	14
Total	139	27	76	37	91	33	56	25	103	26	69	13	33	36	30	21	36	43	14
		19%	54%	26%	65%	23%	41%	18%	74%	19%	50%	9%	24%	26%	21%	15%	26%	31%	10%
Incoming calls	58	14	29	16	40	12	23	8	39	11	24	7	17	20	16	7	20	21	6
	42%	52%	38%	43%	44%	36%	40%	32%	38%	44%	35%	54%	52%	56%	54%	36%	55%	49%	43%
		24%	49%	27%	68%	20%	39%	14%	67%	20%	41%	12%	29%	34%	27%	13%	34%	37%	10%
Outgoing calls	25	3	17	5	17	6	9	5	22	4	13	1	6	1	6	7	4	8	3
	18%	9%	23%	15%	19%	17%	16%	20%	21%	14%	18%	12%	17%	4%	18%	33%	12%	18%	23%
		10%	69%	21%	68%	22%	36%	20%	85%	15%	51%	6%	22%	6%	22%	27%	17%	31%	13%
Internet services	24	3	13	8	14	7	10	6	20	4	13	4	5	5	3	3	5	6	2
	17%	12%	17%	22%	16%	21%	18%	25%	20%	15%	18%	31%	15%	15%	9%	13%	14%	14%	11%
		13%	53%	34%	59%	29%	43%	26%	84%	16%	53%	16%	20%	22%	11%	11%	20%	25%	7%
Calls between different sites	14	1	8	5	7	5	5	3	8	6	8	-	2	4	2	1	4	3	2
	10%	3%	11%	12%	8%	15%	9%	12%	8%	22%	12%	-%	5%	11%	6%	5%	12%	7%	17%
		6%	61%	33%	54%	36%	38%	23%	58%	42%	61%	-%	11%	29%	13%	7%	32%	22%	18%
Fax services	5	2	4	-	5	*	4	-	5	-	4	-	1	1	1	1	-	1	*
	4%	6%	5%	-%	5%	1%	7%	-%	5%	-%	6%	-%	2%	3%	4%	6%	-%	2%	3%
		30%	70%	-%	92%	8%	77%	-%	100%	-%	77%	-%	15%	23%	23%	23%	-%	15%	8%
Data services	5	3	2	*	3	2	2	1	4	1	3	-	2	2	2	1	1	2	-
	4%	11%	2%	1%	3%	7%	4%	3%	4%	3%	4%	-%	6%	4%	7%	4%	3%	5%	-%
		59%	32%	8%	52%	48%	44%	16%	83%	17%	60%	-%	40%	31%	40%	16%	24%	40%	-%
Security/alarm systems	3	-	3	-	3	-	*	1	3	-	2	-	-	1	-	1	-	1	-
	2%	-%	3%	-%	3%	-%	1%	6%	3%	-%	3%	-%	-%	2%	-%	4%	-%	2%	-%
		-%	100%	-%	100%	-%	16%	54%	100%	-%	70%	-%	-%	30%	-%	30%	-%	30%	-%
Card payments	1	1	*	-	1	*	*	-	1	-	*	-	1	1	1	-	1	1	-
	1%	3%	1%	-%	1%	1%	1%	-%	1%	-%	1%	-%	2%	2%	3%	-%	2%	2%	-%
		65%	35%	-%	65%	35%	35%	-%	100%	-%	35%	-%	65%	65%	65%	-%	65%	65%	-%
Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																			

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 17

A3AA. Please rank the functions for which your company uses ISDN2/2e in order of importance? FIRST MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%		*a	b	c	d	e	f	*g	h	i	j	*k	l	m	n	*o	p	q	*r
Unweighted total	141	27	81	33	93	33	55	19	104	30	63	11	37	45	37	22	44	50	17
Effective Weighted Sample	98	19	63	19	67	20	35	13	74	21	42	6	29	41	33	16	39	41	14
Total	139	27	76	37	91	33	56	25	103	26	69	13	33	36	30	21	36	43	14
		19%	54%	26%	65%	23%	41%	18%	74%	19%	50%	9%	24%	26%	21%	15%	26%	31%	10%
Video conferencing	1	1	-	*	1	-	-	-	1	-	-	-	-	1	-	-	1	1	*
	1%	3%	-%	1%	1%	-%	-%	-%	1%	-%	-%	-%	-%	2%	-%	-%	2%	2%	3%
		65%	-%	35%	100%	-%	-%	-%	65%	-%	-%	-%	-%	65%	-%	-%	65%	65%	35%
Don't know	2	*	-	2	*	-	2	*	*	-	2	*	-	-	-	-	-	-	-
	2%	2%	-%	5%	*%	-%	3%	2%	*%	-%	3%	3%	-%	-%	-%	-%	-%	-%	-%
		19%	-%	81%	19%	-%	81%	19%	19%	-%	81%	19%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 18

A3AB. Please rank the functions for which your company uses ISDN2/2e in order of importance? SECOND MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION												
	Total	UNDER			OVER			ISDN2	ISDN30		ISDN2 ONLY	ISDN30		IP NOT ISDN	ISDN30		ISDN & IP	IP SWITCHED		IP NOT SWITCHED	ANY IP
		1-49	50-249	250+	£1M	£1M-£20M	£21M-£100M		£100M	ONLY		BOTH	ONLY		ONLY	ONLY		ONLY	ONLY		
Significance Level: 95%		*a	b	c	*d	e	f	g	h	i	j	*k	l	*m	n	o	p	q	*r	s	
Unweighted total	141	23	32	86	19	39	43	37	141	61	80	-	61	-	67	43	67	53	12	67	
Effective Weighted Sample	98	19	31	79	13	28	37	32	98	60	49	-	60	-	55	42	55	44	10	55	
Total	139	46	40	53	29	43	35	28	139	52	87	-	52	-	57	37	57	47	9	57	
		33%	29%	38%	21%	31%	25%	20%	100%	37%	63%	-%	37%	-%	41%	27%	41%	33%	7%	41%	
Outgoing calls	33	17	2	14	9	10	5	10	33	12	22	-	12	-	12	9	12	11	1	12	
	24%	36%	5%	28%	31%	23%	13%	36%	24%	22%	25%	-%	22%	-%	21%	25%	21%	24%	9%	21%	
		50%	6%	44%	27%	29%	14%	30%	100%	35%	65%	-%	35%	-%	36%	28%	36%	34%	3%	36%	
Internet services	18	1	11	6	1	7	7	3	18	7	12	-	7	-	8	5	8	8	-	8	
	13%	3%	27%	11%	5%	16%	19%	11%	13%	13%	13%	-%	13%	-%	14%	13%	14%	17%	-%	14%	
		8%	59%	33%	8%	38%	36%	17%	100%	36%	64%	-%	36%	-%	44%	26%	44%	44%	-%	44%	
Incoming calls	15	5	6	4	-	7	4	4	15	5	10	-	5	-	7	5	7	4	3	7	
	11%	10%	16%	8%	-%	17%	10%	15%	11%	10%	11%	-%	10%	-%	12%	14%	12%	10%	28%	12%	
		30%	41%	29%	-%	49%	24%	28%	100%	34%	66%	-%	34%	-%	46%	34%	46%	29%	17%	46%	
Security/alarm systems	11	4	2	5	4	-	4	2	11	7	4	-	7	-	6	5	6	5	1	6	
	8%	9%	5%	9%	14%	-%	13%	9%	8%	13%	5%	-%	13%	-%	11%	15%	11%	11%	8%	11%	
		38%	19%	44%	38%	-%	41%	22%	100%	64%	36%	-%	64%	-%	57%	49%	57%	46%	7%	57%	
Data services	10	3	4	3	1	3	4	1	10	4	6	-	4	-	5	3	5	3	1	5	
	7%	6%	11%	5%	5%	7%	12%	3%	7%	7%	7%	-%	7%	-%	8%	8%	8%	7%	15%	8%	
		28%	44%	28%	14%	32%	43%	8%	100%	38%	62%	-%	38%	-%	46%	28%	46%	32%	14%	46%	
Fax services	9	-	5	4	-	4	4	*	9	4	4	-	4	-	2	2	2	1	-	2	
	6%	-%	12%	8%	-%	10%	12%	2%	6%	8%	5%	-%	8%	-%	4%	6%	4%	3%	-%	4%	
		-%	55%	45%	-%	50%	46%	5%	100%	50%	50%	-%	50%	-%	28%	23%	28%	16%	-%	28%	
Calls between different sites	9	1	3	5	2	*	4	2	9	4	4	-	4	-	4	4	4	3	2	4	
	6%	2%	7%	9%	7%	1%	13%	7%	6%	8%	5%	-%	8%	-%	7%	12%	7%	6%	17%	7%	
		13%	32%	55%	22%	5%	50%	23%	100%	49%	51%	-%	49%	-%	49%	49%	49%	31%	18%	49%	
Video conferencing	7	3	4	-	3	4	-	-	7	-	7	-	-	-	1	-	1	1	-	1	
	5%	7%	10%	-%	11%	10%	-%	-%	5%	-%	8%	-%	-%	-%	2%	-%	2%	3%	-%	2%	
		43%	57%	-%	43%	57%	-%	-%	100%	-%	100%	-%	-%	-%	19%	-%	19%	19%	-%	19%	
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																					

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 18

A3AB. Please rank the functions for which your company uses ISDN2/2e in order of importance? SECOND MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											ANY IP	
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30		IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP SWITCHED			IP NOT SWITCHED
					£1M	£1M- £20M	£21M-£10 0M	OVER £100M				ONLY	BOTH ISDN					SWITCHED	ISDN		
Significance Level: 95%		*a	b	c	*d	e	f	g	h	i	j	*k	l	*m	n	o	p	q	r	s	
Unweighted total	141	23	32	86	19	39	43	37	141	61	80	-	61	-	67	43	67	53	12	67	
Effective Weighted Sample	98	19	31	79	13	28	37	32	98	60	49	-	60	-	55	42	55	44	10	55	
Total	139	46	40	53	29	43	35	28	139	52	87	-	52	-	57	37	57	47	9	57	
		33%	29%	38%	21%	31%	25%	20%	100%	37%	63%	-%	37%	-%	41%	27%	41%	33%	7%	41%	
Card payments	5	1	1	3	-	3	2	1	5	3	3	-	3	-	3	1	3	2	1	3	
	4%	2%	3%	5%	-%	6%	6%	3%	4%	5%	3%	-%	5%	-%	5%	2%	5%	5%	9%	5%	
		21%	26%	53%	-%	47%	37%	16%	100%	51%	49%	-%	51%	-%	56%	15%	56%	41%	16%	56%	
Don't know/ None given	21	11	1	8	8	5	1	4	21	7	15	-	7	-	8	2	8	7	1	8	
	15%	25%	3%	16%	27%	11%	2%	15%	15%	13%	17%	-%	13%	-%	14%	6%	14%	15%	15%	14%	
		54%	7%	40%	37%	22%	4%	19%	100%	31%	69%	-%	31%	-%	39%	11%	39%	32%	7%	39%	
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																					

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 18

A3AB. Please rank the functions for which your company uses ISDN2/2e in order of importance? SECOND MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN30			ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		ISDN2	*b	IP														
Significance Level: 95%		a	*b	*c	d	e	f	*g	h	*i	j	k	l	*m	n	o	p	q
Unweighted total	141	123	18	-	88	53	33	28	42	25	105	36	94	11	58	83	43	94
Effective Weighted Sample	98	83	18	-	60	37	32	28	34	21	77	22	72	7	42	56	27	81
Total	139	124	16	-	82	57	28	24	38	20	103	37	88	15	62	77	57	80
		89%	11%	-%	59%	41%	20%	17%	27%	14%	74%	26%	63%	11%	45%	55%	41%	57%
Outgoing calls	33	31	2	-	21	13	8	3	9	3	20	13	13	7	11	22	17	16
	24%	25%	15%	-%	25%	22%	29%	14%	23%	17%	20%	35%	15%	51%	18%	29%	30%	20%
		93%	7%	-%	62%	38%	24%	10%	26%	10%	61%	39%	39%	23%	33%	67%	51%	49%
Internet services	18	16	2	-	13	5	2	5	4	4	13	5	11	1	9	9	6	10
	13%	13%	15%	-%	16%	9%	6%	21%	12%	18%	12%	15%	13%	10%	15%	11%	11%	13%
		87%	13%	-%	71%	29%	9%	27%	24%	20%	70%	30%	63%	8%	51%	49%	35%	57%
Incoming calls	15	14	1	-	12	3	3	2	5	2	14	1	11	3	5	10	5	11
	11%	12%	5%	-%	15%	5%	12%	8%	13%	11%	14%	2%	13%	21%	8%	13%	8%	13%
		95%	5%	-%	80%	20%	22%	12%	32%	15%	94%	6%	74%	21%	34%	66%	30%	70%
Security/alarm systems	11	8	3	-	7	4	4	3	5	1	11	-	11	-	6	4	5	6
	8%	6%	20%	-%	8%	7%	13%	14%	14%	5%	11%	-%	12%	-%	10%	6%	9%	7%
		72%	28%	-%	63%	37%	33%	31%	48%	9%	100%	-%	100%	-%	59%	41%	49%	51%
Data services	10	9	1	-	6	4	1	3	3	1	9	1	7	2	6	4	2	8
	7%	7%	7%	-%	8%	7%	4%	12%	9%	7%	8%	4%	8%	12%	10%	5%	4%	9%
		90%	10%	-%	62%	38%	10%	28%	32%	14%	86%	14%	68%	18%	60%	40%	22%	74%
Fax services	9	7	2	-	6	3	2	3	2	-	6	3	6	-	2	7	3	6
	6%	6%	13%	-%	7%	6%	6%	11%	7%	-%	6%	8%	7%	-%	3%	9%	6%	7%
		77%	23%	-%	64%	36%	20%	29%	28%	-%	68%	32%	68%	-%	18%	82%	37%	63%
Calls between different sites	9	7	2	-	5	4	2	2	1	3	6	3	5	*	2	7	2	6
	6%	6%	10%	-%	6%	7%	8%	8%	3%	16%	6%	8%	6%	3%	3%	9%	4%	8%
		82%	18%	-%	57%	43%	27%	22%	13%	36%	65%	35%	61%	5%	23%	77%	27%	73%
Video conferencing	7	7	-	-	-	7	-	-	1	-	3	5	3	-	3	5	3	4
	5%	6%	-%	-%	-%	13%	-%	-%	4%	-%	3%	12%	3%	-%	4%	6%	5%	5%
					d													
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q		100%	-%	-%	-%	100%	-%	-%	19%	-%	38%	62%	38%	-%	38%	62%	43%	57%

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 18

A3AB. Please rank the functions for which your company uses ISDN2/2e in order of importance? SECOND MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	*b	*c	d	e	f	*g	h	*i	j	k	l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	141	123	18	-	88	53	33	28	42	25	105	36	94	11	58	83	43	94
Effective Weighted Sample	98	83	18	-	60	37	32	28	34	21	77	22	72	7	42	56	27	81
Total	139	124	16	-	82	57	28	24	38	20	103	37	88	15	62	77	57	80
		89%	11%	-%	59%	41%	20%	17%	27%	14%	74%	26%	63%	11%	45%	55%	41%	57%
Card payments	5	5	-	-	3	3	3	-	1	2	4	2	4	-	4	1	1	4
	4%	4%	-%	-%	3%	4%	10%	-%	2%	11%	4%	4%	4%	-%	7%	2%	2%	5%
		100%	-%	-%	53%	47%	51%	-%	16%	41%	70%	30%	70%	-%	77%	23%	21%	79%
Don't know/ None given	21	19	2	-	10	11	3	3	5	3	17	4	17	*	13	8	11	9
	15%	15%	15%	-%	12%	20%	12%	13%	14%	15%	17%	11%	19%	3%	21%	10%	20%	11%
		89%	11%	-%	48%	52%	16%	15%	25%	14%	81%	19%	79%	2%	62%	38%	54%	42%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 18

A3AB. Please rank the functions for which your company uses ISDN2/2e in order of importance? SECOND MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%		*a	b	c	d	e	f	*g	h	i	j	*k	l	m	n	*o	p	q	*r
Unweighted total	141	27	81	33	93	33	55	19	104	30	63	11	37	45	37	22	44	50	17
Effective Weighted Sample	98	19	63	19	67	20	35	13	74	21	42	6	29	41	33	16	39	41	14
Total	139	27	76	37	91	33	56	25	103	26	69	13	33	36	30	21	36	43	14
		19%	54%	26%	65%	23%	41%	18%	74%	19%	50%	9%	24%	26%	21%	15%	26%	31%	10%
Outgoing calls	33	7	13	13	19	8	13	8	21	4	15	6	10	10	8	2	10	10	2
	24%	27%	17%	35%	21%	25%	23%	32%	20%	16%	21%	50%	29%	29%	27%	11%	27%	24%	12%
		22%	40%	39%	59%	24%	39%	25%	63%	13%	45%	19%	29%	31%	25%	7%	30%	31%	5%
Internet services	18	4	14	-	11	4	6	5	16	2	9	1	4	6	6	4	4	5	3
	13%	16%	18%	-%	12%	11%	10%	18%	15%	8%	13%	8%	13%	17%	19%	18%	11%	12%	20%
		24%	76%	-%	59%	20%	31%	25%	88%	12%	51%	6%	24%	34%	32%	21%	23%	28%	15%
Incoming calls	15	1	7	8	9	6	5	4	12	3	5	4	3	4	2	3	4	4	3
	11%	3%	9%	21%	10%	18%	8%	14%	11%	13%	7%	28%	8%	11%	8%	13%	12%	9%	23%
		5%	45%	50%	58%	39%	30%	23%	77%	23%	30%	23%	17%	26%	16%	17%	29%	25%	21%
Security/alarm systems	11	5	5	1	9	1	4	1	9	2	5	-	4	4	3	3	3	5	2
	8%	18%	7%	3%	10%	2%	7%	3%	8%	8%	7%	-%	11%	11%	10%	14%	8%	11%	12%
		43%	46%	11%	86%	7%	36%	7%	78%	18%	43%	-%	33%	35%	27%	27%	26%	42%	15%
Data services	10	1	6	3	6	4	5	*	9	1	5	*	2	5	1	*	4	3	2
	7%	3%	8%	9%	6%	12%	9%	2%	8%	5%	7%	3%	6%	13%	4%	2%	12%	7%	13%
		8%	61%	32%	56%	40%	50%	4%	86%	14%	50%	4%	18%	46%	12%	4%	42%	28%	18%
Fax services	9	1	7	1	7	-	5	1	6	3	6	*	*	1	1	-	2	1	1
	6%	3%	9%	4%	8%	-%	9%	6%	6%	11%	9%	3%	1%	3%	5%	-%	7%	2%	10%
		9%	74%	16%	84%	-%	56%	16%	68%	32%	67%	5%	5%	12%	16%	-%	28%	12%	16%
Calls between different sites	9	2	4	2	5	2	3	1	4	5	4	-	3	3	1	2	2	3	1
	6%	7%	6%	7%	5%	7%	5%	6%	4%	19%	6%	-%	8%	9%	4%	9%	7%	8%	6%
		22%	50%	28%	56%	28%	35%	16%	44%	56%	51%	-%	31%	36%	13%	22%	27%	40%	9%
Video conferencing	7	-	4	3	4	3	1	5	4	3	6	-	1	-	1	1	-	1	-
	5%	-%	6%	9%	5%	10%	2%	18%	4%	12%	9%	-%	4%	-%	5%	7%	-%	3%	-%
		-%	57%	43%	57%	43%	19%	62%	57%	43%	81%	-%	19%	-%	19%	19%	-%	19%	-%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r



# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 18

A3AB. Please rank the functions for which your company uses ISDN2/2e in order of importance? SECOND MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
								UP TO							UP TO				
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%	*a	b	c	d	e	f	*g	h	i	j	*k	l	m	n	*o	p	q	*r	
Unweighted total	141	27	81	33	93	33	55	19	104	30	63	11	37	45	37	22	44	50	17
Effective Weighted Sample	98	19	63	19	67	20	35	13	74	21	42	6	29	41	33	16	39	41	14
Total	139	27	76	37	91	33	56	25	103	26	69	13	33	36	30	21	36	43	14
		19%	54%	26%	65%	23%	41%	18%	74%	19%	50%	9%	24%	26%	21%	15%	26%	31%	10%
Card payments	5	2	3	1	5	1	2	-	5	1	2	*	2	*	2	1	2	3	-
	4%	7%	3%	2%	5%	3%	4%	-%	4%	3%	3%	3%	6%	1%	6%	7%	4%	7%	-%
		36%	49%	16%	84%	16%	44%	-%	85%	15%	36%	8%	34%	8%	34%	26%	30%	56%	-%
Don't know/ None given	21	4	13	4	16	4	13	*	19	1	13	*	5	2	4	4	4	7	1
	15%	16%	17%	11%	17%	12%	22%	2%	18%	3%	18%	3%	14%	7%	12%	19%	12%	17%	6%
		20%	61%	19%	74%	18%	59%	2%	88%	4%	59%	2%	21%	11%	17%	18%	21%	35%	4%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 19

A3AC. Please rank the functions for which your company uses ISDN2/2e in order of importance? THIRD MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP SWITCHED	IP NOT SWITCHED	ANY IP
					£1M	£1M-£20M	£21M-£100M	OVER £100M										ISDN	ISDN	
Significance Level: 95%		*a	b	c	*d	e	f	g	h	i	j	*k	l	*m	n	o	p	q	*r	s
Unweighted total	141	23	32	86	19	39	43	37	141	61	80	-	61	-	67	43	67	53	12	67
Effective Weighted Sample	98	19	31	79	13	28	37	32	98	60	49	-	60	-	55	42	55	44	10	55
Total	139	46	40	53	29	43	35	28	139	52	87	-	52	-	57	37	57	47	9	57
		33%	29%	38%	21%	31%	25%	20%	100%	37%	63%	-%	37%	-%	41%	27%	41%	33%	7%	41%
Internet services	21	12	1	8	9	4	2	7	21	7	15	-	7	-	9	5	9	5	4	9
	15%	26%	3%	15%	30%	10%	5%	24%	15%	13%	17%	-%	13%	-%	15%	14%	15%	10%	38%	15%
								f												
		56%	7%	38%	41%	20%	8%	31%	100%	31%	69%	-%	31%	-%	41%	24%	41%	22%	17%	41%
Fax services	19	9	7	3	5	12	2	1	19	3	15	-	3	-	2	1	2	1	1	2
	14%	19%	17%	6%	16%	27%	6%	3%	14%	7%	18%	-%	7%	-%	4%	2%	4%	3%	8%	4%
						fg					opqs									
		46%	37%	17%	24%	61%	11%	4%	100%	18%	82%	-%	18%	-%	12%	4%	12%	7%	4%	12%
Calls between different sites	15	1	4	9	-	5	3	7	15	9	6	-	9	-	11	9	11	10	1	11
	11%	3%	11%	18%	-%	12%	9%	25%	11%	18%	7%	-%	18%	-%	19%	25%	19%	21%	9%	19%
															hj		j			
		9%	30%	61%	-%	34%	20%	46%	100%	62%	38%	-%	62%	-%	70%	62%	70%	65%	6%	70%
Card payments	14	3	4	6	3	*	8	2	14	8	6	-	8	-	6	5	6	6	-	6
	10%	7%	11%	12%	11%	1%	24%	6%	10%	15%	7%	-%	15%	-%	11%	14%	11%	14%	-%	11%
						eg														
		22%	32%	46%	22%	3%	61%	11%	100%	56%	44%	-%	56%	-%	46%	37%	46%	46%	-%	46%
Data services	14	-	6	8	1	3	4	5	14	6	8	-	6	-	7	4	7	6	1	7
	10%	-%	14%	15%	5%	7%	12%	18%	10%	11%	9%	-%	11%	-%	12%	11%	12%	12%	13%	12%
		-%	41%	59%	10%	24%	31%	35%	100%	41%	59%	-%	41%	-%	52%	29%	52%	43%	9%	52%
Security/alarm systems	10	3	5	2	-	4	6	-	10	4	6	-	4	-	6	4	6	6	-	6
	7%	6%	12%	4%	-%	10%	17%	-%	7%	8%	6%	-%	8%	-%	10%	12%	10%	13%	-%	10%
							g													
		28%	48%	24%	-%	42%	58%	-%	100%	44%	56%	-%	44%	-%	58%	44%	58%	58%	-%	58%
Outgoing calls	8	3	2	3	-	5	2	1	8	3	6	-	3	-	3	1	3	2	1	3
	6%	7%	6%	5%	-%	12%	5%	5%	6%	5%	7%	-%	5%	-%	6%	3%	6%	5%	9%	6%
		37%	29%	34%	-%	63%	22%	15%	100%	31%	69%	-%	31%	-%	39%	12%	39%	29%	10%	39%
Video conferencing	5	-	4	2	-	*	4	1	5	2	4	-	2	-	2	2	2	1	1	2
	4%	-%	9%	3%	-%	1%	12%	3%	4%	3%	4%	-%	3%	-%	4%	5%	4%	3%	8%	4%
		-%	70%	30%	-%	8%	78%	15%	100%	33%	67%	-%	33%	-%	41%	33%	41%	27%	15%	41%
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																				

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 19

A3AC. Please rank the functions for which your company uses ISDN2/2e in order of importance? THIRD MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION												
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	IP SWITCHED		IP NOT SWITCHED		ANY IP
					£1M	£1M-£20M	£21M-£100M	OVER £100M									ISDN	ISDN			
Significance Level: 95%		*a	b	c	*d	e	f	g	h	i	j	*k	l	*m	n	o	p	q	*r	s	
Unweighted total	141	23	32	86	19	39	43	37	141	61	80	-	61	-	67	43	67	53	12	67	
Effective Weighted Sample	98	19	31	79	13	28	37	32	98	60	49	-	60	-	55	42	55	44	10	55	
Total	139	46	40	53	29	43	35	28	139	52	87	-	52	-	57	37	57	47	9	57	
		33%	29%	38%	21%	31%	25%	20%	100%	37%	63%	-%	37%	-%	41%	27%	41%	33%	7%	41%	
Incoming calls	5	-	4	1	*	2	3	-	5	1	4	-	1	-	-	-	-	-	-	-	
	4%	-%	9%	2%	1%	4%	8%	-%	4%	2%	5%	-%	2%	-%	-%	-%	-%	-%	-%	-%	
		-%	75%	25%	8%	36%	56%	-%	100%	20%	80%	-%	20%	-%	-%	-%	-%	-%	-%	-%	
Don't know/ None given	27	15	2	10	11	7	1	5	27	9	18	-	9	-	11	5	11	9	1	11	
	20%	33%	6%	18%	37%	16%	2%	17%	20%	18%	21%	-%	18%	-%	19%	14%	19%	19%	15%	19%	
		56%	9%	35%	39%	26%	3%	18%	100%	34%	66%	-%	34%	-%	41%	19%	41%	32%	5%	41%	
Columns Tested:	a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																				

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 19

A3AC. Please rank the functions for which your company uses ISDN2/2e in order of importance? THIRD MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	*b	*c	d	e	f	*g	h	*i	j	k	l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	141	123	18	-	88	53	33	28	42	25	105	36	94	11	58	83	43	94
Effective Weighted Sample	98	83	18	-	60	37	32	28	34	21	77	22	72	7	42	56	27	81
Total	139	124	16	-	82	57	28	24	38	20	103	37	88	15	62	77	57	80
		89%	11%	-%	59%	41%	20%	17%	27%	14%	74%	26%	63%	11%	45%	55%	41%	57%
Internet services	21	21	1	-	15	7	2	4	7	2	11	11	11	-	7	15	13	9
	15%	17%	5%	-%	18%	12%	8%	18%	18%	10%	10%	29%	12%	-%	11%	19%	22%	11%
		96%	4%	-%	69%	31%	11%	20%	31%	9%	50%	50%	50%	-%	31%	69%	60%	40%
Fax services	19	19	-	-	5	14	3	-	1	1	14	5	7	7	9	10	9	10
	14%	15%	-%	-%	6%	25%	12%	-%	2%	7%	14%	14%	8%	46%	14%	13%	15%	13%
		100%	-%	-%	24%	76%	18%	-%	4%	7%	74%	26%	39%	35%	46%	54%	46%	54%
Calls between different sites	15	14	1	-	10	5	6	4	9	2	14	1	12	2	4	11	3	12
	11%	12%	5%	-%	12%	9%	21%	15%	23%	9%	14%	2%	14%	15%	6%	15%	5%	15%
		95%	5%	-%	68%	32%	38%	24%	58%	12%	94%	6%	80%	14%	24%	76%	18%	79%
Card payments	14	10	4	-	11	3	5	3	5	1	12	2	12	*	9	5	6	8
	10%	8%	23%	-%	13%	5%	19%	11%	14%	6%	12%	5%	13%	3%	15%	6%	11%	10%
		74%	26%	-%	78%	22%	37%	19%	38%	9%	87%	13%	84%	3%	66%	34%	44%	56%
Data services	14	10	3	-	13	1	2	3	2	5	8	6	8	-	6	8	2	12
	10%	8%	20%	-%	15%	1%	8%	13%	6%	23%	8%	15%	9%	-%	9%	10%	3%	15%
		77%	23%	-%	94%	6%	17%	23%	18%	34%	59%	41%	59%	-%	43%	57%	13%	87%
Security/alarm systems	10	9	1	-	4	6	3	2	4	2	9	1	9	-	7	3	2	8
	7%	7%	7%	-%	5%	11%	10%	7%	11%	8%	9%	2%	10%	-%	11%	4%	4%	10%
		90%	10%	-%	40%	60%	28%	16%	42%	16%	92%	8%	92%	-%	68%	32%	22%	78%
Outgoing calls	8	8	-	-	7	1	1	2	*	3	7	1	4	3	3	5	4	4
	6%	7%	-%	-%	9%	2%	3%	8%	1%	14%	7%	4%	4%	21%	5%	7%	7%	6%
		100%	-%	-%	88%	12%	9%	22%	5%	34%	83%	17%	45%	37%	38%	62%	47%	53%
Video conferencing	5	4	2	-	2	3	2	-	2	*	4	2	4	-	*	5	-	5
	4%	3%	12%	-%	3%	6%	6%	-%	5%	2%	4%	5%	4%	-%	1%	7%	-%	7%
		67%	33%	-%	41%	59%	33%	-%	33%	8%	67%	33%	67%	-%	8%	92%	-%	100%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 19

A3AC. Please rank the functions for which your company uses ISDN2/2e in order of importance? THIRD MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	*b	*c	d	e	f	*g	h	*i	j	k	l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	141	123	18	-	88	53	33	28	42	25	105	36	94	11	58	83	43	94
Effective Weighted Sample	98	83	18	-	60	37	32	28	34	21	77	22	72	7	42	56	27	81
Total	139	124	16	-	82	57	28	24	38	20	103	37	88	15	62	77	57	80
		89%	11%	-%	59%	41%	20%	17%	27%	14%	74%	26%	63%	11%	45%	55%	41%	57%
Incoming calls	5	5	-	-	4	1	-	1	-	-	3	2	3	*	1	4	4	1
	4%	4%	-%	-%	4%	2%	-%	4%	-%	-%	3%	5%	3%	3%	2%	5%	6%	2%
		100%	-%	-%	73%	27%	-%	20%	-%	-%	64%	36%	56%	8%	29%	71%	71%	29%
Don't know/ None given	27	23	4	-	12	15	3	6	7	4	20	7	19	2	16	11	15	10
	20%	19%	28%	-%	14%	27%	12%	25%	19%	20%	20%	19%	21%	12%	26%	15%	26%	13%
		84%	16%	-%	44%	56%	12%	22%	26%	15%	75%	25%	68%	7%	59%	41%	54%	37%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 19

A3AC. Please rank the functions for which your company uses ISDN2/2e in order of importance? THIRD MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
	Total	NEVER			YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
		LAST YEAR	EVER	/DK															
Significance Level: 95%		*a	b	c	d	e	f	*g	h	i	j	*k	l	m	n	*o	p	q	*r
Unweighted total	141	27	81	33	93	33	55	19	104	30	63	11	37	45	37	22	44	50	17
Effective Weighted Sample	98	19	63	19	67	20	35	13	74	21	42	6	29	41	33	16	39	41	14
Total	139	27	76	37	91	33	56	25	103	26	69	13	33	36	30	21	36	43	14
		19%	54%	26%	65%	23%	41%	18%	74%	19%	50%	9%	24%	26%	21%	15%	26%	31%	10%
Internet services	21	3	4	14	10	8	9	4	10	5	9	4	4	7	4	2	7	5	4
	15%	13%	5%	39%	11%	26%	16%	14%	9%	20%	13%	28%	13%	20%	13%	7%	19%	12%	26%
		16%	17%	b	46%	39%	43%	17%	45%	24%	43%	17%	20%	34%	18%	7%	32%	24%	17%
Fax services	19	1	14	4	13	5	10	7	15	4	16	*	1	-	2	1	1	1	1
	14%	4%	18%	11%	15%	15%	18%	27%	14%	17%	24%	3%	4%	-%	7%	7%	2%	3%	6%
		6%	73%	21%	70%	26%	53%	35%	77%	23%	86%	2%	7%	-%	12%	7%	4%	7%	4%
Calls between different sites	15	6	7	2	11	2	2	2	10	3	2	2	7	8	7	4	7	8	2
	11%	24%	9%	6%	12%	7%	4%	9%	10%	12%	3%	18%	22%	22%	23%	18%	19%	19%	16%
		42%	44%	14%	73%	15%	15%	15%	67%	21%	15%	15%	48%	52%	46%	24%	46%	56%	15%
Card payments	14	7	7	-	11	2	6	2	14	*	7	1	5	5	5	2	5	6	1
	10%	26%	9%	-%	13%	5%	10%	7%	13%	2%	9%	8%	14%	14%	16%	8%	13%	13%	6%
		49%	51%	-%	81%	11%	41%	13%	97%	3%	46%	7%	33%	35%	33%	12%	35%	40%	6%
Data services	14	2	11	1	10	1	5	2	8	5	7	-	4	5	5	3	4	4	3
	10%	6%	14%	3%	11%	4%	8%	7%	8%	20%	10%	-%	11%	14%	17%	16%	10%	10%	18%
		12%	79%	9%	75%	9%	35%	13%	62%	38%	48%	-%	27%	38%	37%	25%	27%	32%	19%
Security/alarm systems	10	1	6	3	9	1	4	-	9	1	4	-	5	4	1	2	4	6	-
	7%	3%	8%	8%	9%	4%	7%	-%	9%	3%	6%	-%	15%	10%	5%	11%	10%	13%	-%
		8%	64%	28%	86%	14%	42%	-%	92%	8%	42%	-%	50%	36%	14%	22%	36%	58%	-%
Outgoing calls	8	1	3	4	3	5	2	3	8	1	2	3	*	2	-	-	3	2	1
	6%	3%	4%	12%	3%	16%	4%	12%	7%	3%	3%	25%	1%	7%	-%	-%	9%	4%	10%
		9%	38%	52%	31%	d	24%	37%	90%	10%	24%	37%	5%	29%	-%	-%	39%	22%	17%
Video conferencing	5	-	5	1	3	-	2	1	4	1	3	-	1	1	1	1	1	1	1
	4%	-%	6%	2%	4%	-%	3%	6%	4%	5%	5%	-%	3%	4%	4%	6%	3%	3%	6%
		-%	85%	15%	59%	-%	33%	26%	74%	26%	59%	-%	19%	27%	22%	22%	19%	27%	15%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 19

A3AC. Please rank the functions for which your company uses ISDN2/2e in order of importance? THIRD MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
								UP TO							UP TO				
	LAST YEAR	EVER	NEVER	YES	NO	YES	NO/DK	3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	2 YEARS	OVER 2 YEARS	YES	NO/DK	
	Total	*a	b	c	d	e	f	*g	h	i	j	*k	l	m	n	*o	p	q	*r
Significance Level: 95%																			
Unweighted total	141	27	81	33	93	33	55	19	104	30	63	11	37	45	37	22	44	50	17
Effective Weighted Sample	98	19	63	19	67	20	35	13	74	21	42	6	29	41	33	16	39	41	14
Total	139	27	76	37	91	33	56	25	103	26	69	13	33	36	30	21	36	43	14
		19%	54%	26%	65%	23%	41%	18%	74%	19%	50%	9%	24%	26%	21%	15%	26%	31%	10%
Incoming calls	5	1	3	1	3	2	4	1	5	*	5	*	-	-	-	-	-	-	-
	4%	5%	4%	2%	3%	7%	7%	6%	5%	2%	7%	3%	-%	-%	-%	-%	-%	-%	-%
		27%	56%	16%	56%	44%	73%	27%	92%	8%	92%	8%	-%	-%	-%	-%	-%	-%	-%
Don't know/ None given	27	4	17	6	18	5	13	3	21	4	14	2	5	3	5	6	5	9	2
	20%	16%	22%	18%	20%	16%	23%	13%	21%	16%	21%	14%	16%	9%	15%	28%	15%	21%	13%
		16%	61%	24%	65%	19%	48%	12%	79%	15%	53%	7%	19%	12%	17%	21%	20%	34%	7%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 20

A3A. Please rank the functions for which your company uses ISDN2/2e in order of importance? RANKED FIRST, SECOND OR THIRD MOST IMPORTANT FUNCTION (MULTI CODE)

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION												
	Total	UNDER			£1M- £20M	OVER			ISDN2	ISDN30		ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP	IP NOT	ANY
		1-49	50-249	250+		£1M	£21M-£100M	£100M		ISDN2	ISDN30								SWITCHED	SWITCHED	
Significance Level: 95%		*a	b	c	*d	e	f	g	h	i	j	*k	l	*m	n	o	p	q	*r	s	
Unweighted total	141	23	32	86	19	39	43	37	141	61	80	-	61	-	67	43	67	53	12	67	
Effective Weighted Sample	98	19	31	79	13	28	37	32	98	60	49	-	60	-	55	42	55	44	10	55	
Total	139	46	40	53	29	43	35	28	139	52	87	-	52	-	57	37	57	47	9	57	
		33%	29%	38%	21%	31%	25%	20%	100%	37%	63%	-%	37%	-%	41%	27%	41%	33%	7%	41%	
Incoming calls	79	27	20	32	17	25	18	18	79	30	48	-	30	-	35	24	35	28	6	35	
	57%	58%	49%	61%	57%	58%	53%	67%	57%	58%	55%	-%	58%	-%	60%	66%	60%	60%	68%	60%	
		34%	25%	41%	21%	32%	23%	23%	100%	39%	61%	-%	39%	-%	44%	31%	44%	36%	8%	44%	
Outgoing calls	67	32	14	21	16	21	13	17	67	21	45	-	21	-	26	14	26	21	5	26	
	48%	69%	34%	40%	56%	49%	37%	61%	48%	41%	52%	-%	41%	-%	46%	38%	46%	45%	56%	46%	
		48%	20%	32%	24%	32%	19%	25%	100%	32%	68%	-%	32%	-%	39%	21%	39%	32%	8%	39%	
Internet services	64	21	22	21	10	22	15	12	64	21	42	-	21	-	24	16	24	19	5	24	
	46%	45%	54%	40%	35%	51%	43%	45%	46%	41%	49%	-%	41%	-%	42%	42%	42%	40%	55%	42%	
		33%	34%	33%	16%	35%	24%	20%	100%	33%	67%	-%	33%	-%	38%	24%	38%	29%	8%	38%	
Calls between different sites	38	7	12	18	6	10	10	11	38	19	19	-	19	-	20	17	20	16	3	20	
	27%	14%	31%	35%	22%	23%	30%	40%	27%	36%	22%	-%	36%	-%	35%	47%	35%	35%	30%	35%	
		18%	33%	49%	17%	26%	28%	29%	100%	50%	50%	-%	50%	-%	54%	46%	54%	44%	8%	54%	
Fax services	33	9	14	10	5	18	8	2	33	11	23	-	11	-	6	4	6	4	1	6	
	24%	19%	35%	19%	16%	41%	24%	7%	24%	20%	26%	-%	20%	-%	10%	10%	10%	9%	8%	10%	
		27%	43%	30%	14%	54%	25%	6%	npqs 100%	32%	npqs 68%	-%	32%	-%	18%	11%	18%	12%	2%	18%	
Data services	29	3	11	15	3	6	12	6	29	12	17	-	12	-	14	8	14	11	3	14	
	21%	6%	28%	28%	11%	15%	35%	23%	21%	23%	20%	-%	23%	-%	24%	23%	24%	24%	28%	24%	
		10%	40%	50%	11%	22%	43%	22%	100%	41%	59%	-%	41%	-%	48%	29%	48%	38%	9%	48%	
Security/alarm systems	24	7	8	8	5	6	10	2	24	12	11	-	12	-	13	11	13	12	1	13	
	17%	15%	21%	16%	17%	14%	30%	9%	17%	23%	13%	-%	23%	-%	22%	29%	22%	25%	8%	22%	
		29%	35%	35%	21%	25%	g 44%	10%	100%	52%	48%	-%	52%	-%	55%	45%	55%	49%	3%	55%	
Card payments	21	4	6	10	3	3	11	3	21	11	9	-	11	-	10	7	10	9	1	10	
	15%	9%	15%	20%	11%	7%	31%	12%	15%	22%	11%	-%	22%	-%	18%	18%	18%	20%	9%	18%	
		21%	29%	51%	15%	14%	e 53%	16%	100%	55%	45%	-%	55%	-%	50%	33%	50%	46%	4%	50%	
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																					



# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 20**

**A3A. Please rank the functions for which your company uses ISDN2/2e in order of importance? RANKED FIRST, SECOND OR THIRD MOST IMPORTANT FUNCTION (MULTI CODE)**

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30		IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN	IP SWITCHED	IP NOT SWITCHED	ANY
					£1M	£1M-£20M	£21M-£100M	OVER £100M				ONLY	BOTH					ISDN	ISDN	
Significance Level: 95%		*a	b	c	*d	e	f	g	h	i	j	*k	l	*m	n	o	p	q	*r	s
Unweighted total	141	23	32	86	19	39	43	37	141	61	80	-	61	-	67	43	67	53	12	67
Effective Weighted Sample	98	19	31	79	13	28	37	32	98	60	49	-	60	-	55	42	55	44	10	55
Total	139	46	40	53	29	43	35	28	139	52	87	-	52	-	57	37	57	47	9	57
		33%	29%	38%	21%	31%	25%	20%	100%	37%	63%	-%	37%	-%	41%	27%	41%	33%	7%	41%
Video conferencing	14	3	8	3	3	5	5	1	14	3	11	-	3	-	5	3	5	4	1	5
	10%	7%	20%	5%	11%	12%	13%	3%	10%	5%	13%	-%	5%	-%	8%	7%	8%	8%	8%	8%
			c																	
		22%	57%	20%	22%	39%	33%	6%	100%	19%	81%	-%	19%	-%	35%	19%	35%	26%	6%	35%
Don't know	2	-	1	1	-	2	-	*	2	-	2	-	-	-	-	-	-	-	-	-
	2%	-%	3%	2%	-%	4%	-%	2%	2%	-%	3%	-%	-%	-%	-%	-%	-%	-%	-%	-%
		-%	63%	38%	-%	81%	-%	19%	100%	-%	100%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 20

A3A. Please rank the functions for which your company uses ISDN2/2e in order of importance? RANKED FIRST, SECOND OR THIRD MOST IMPORTANT FUNCTION (MULTI CODE)

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	*b	*c	d	e	f	*g	h	*i	j	k	l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	141	123	18	-	88	53	33	28	42	25	105	36	94	11	58	83	43	94
Effective Weighted Sample	98	83	18	-	60	37	32	28	34	21	77	22	72	7	42	56	27	81
Total	139	124	16	-	82	57	28	24	38	20	103	37	88	15	62	77	57	80
		89%	11%	-%	59%	41%	20%	17%	27%	14%	74%	26%	63%	11%	45%	55%	41%	57%
Incoming calls	79	72	7	-	55	24	18	13	23	12	59	20	48	11	31	48	34	45
	57%	58%	44%	-%	67%	42%	64%	52%	60%	60%	58%	54%	55%	75%	49%	62%	60%	56%
		91%	9%	-%	70%	30%	23%	16%	29%	15%	75%	25%	61%	14%	39%	61%	43%	57%
Outgoing calls	67	64	3	-	41	26	12	9	18	9	49	18	37	12	26	41	30	35
	48%	52%	20%	-%	50%	45%	44%	38%	47%	43%	48%	48%	42%	82%	42%	53%	54%	44%
		95%	5%	-%	61%	39%	18%	14%	27%	13%	74%	26%	56%	18%	39%	61%	45%	52%
Internet services	64	57	7	-	42	22	10	11	16	8	41	22	35	6	26	38	26	36
	46%	46%	44%	-%	51%	38%	36%	46%	43%	39%	40%	61%	40%	43%	42%	49%	46%	45%
		89%	11%	-%	66%	34%	16%	17%	26%	12%	65%	35%	55%	10%	41%	59%	41%	56%
Calls between different sites	38	32	5	-	20	17	9	10	11	9	28	10	25	3	13	25	12	25
	27%	26%	33%	-%	25%	30%	32%	41%	29%	47%	27%	26%	29%	18%	21%	32%	22%	31%
		86%	14%	-%	55%	45%	24%	26%	29%	25%	74%	26%	67%	7%	34%	66%	33%	66%
Fax services	33	31	2	-	13	20	7	4	4	2	25	8	19	7	14	20	12	21
	24%	25%	13%	-%	16%	35%	25%	15%	11%	9%	25%	21%	21%	46%	22%	25%	22%	26%
		94%	6%	-%	40%	60%	21%	11%	12%	5%	77%	23%	56%	20%	41%	59%	38%	62%
Data services	29	24	5	-	24	5	4	8	8	6	20	9	18	2	15	13	7	22
	21%	19%	32%	-%	29%	9%	15%	31%	20%	30%	20%	24%	21%	12%	25%	17%	12%	27%
		83%	17%	-%	82%	18%	15%	26%	27%	21%	70%	30%	64%	6%	53%	47%	23%	75%
Security/alarm systems	24	19	5	-	11	13	6	6	10	3	21	3	20	*	14	9	9	15
	17%	15%	31%	-%	13%	22%	23%	24%	25%	17%	20%	8%	23%	3%	23%	12%	15%	19%
		79%	21%	-%	46%	54%	28%	24%	40%	14%	87%	13%	86%	2%	61%	39%	37%	63%
Card payments	21	17	4	-	15	6	8	3	7	3	17	3	17	*	15	6	8	13
	15%	14%	23%	-%	18%	10%	28%	14%	18%	17%	17%	9%	19%	3%	24%	8%	14%	16%
		82%	18%	-%	73%	27%	39%	17%	33%	16%	83%	17%	81%	2%	71%	29%	37%	63%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 20

A3A. Please rank the functions for which your company uses ISDN2/2e in order of importance? RANKED FIRST, SECOND OR THIRD MOST IMPORTANT FUNCTION (MULTI CODE)

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	*b	*c	d	e	f	*g	h	*i	j	k	l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	141	123	18	-	88	53	33	28	42	25	105	36	94	11	58	83	43	94
Effective Weighted Sample	98	83	18	-	60	37	32	28	34	21	77	22	72	7	42	56	27	81
Total	139	124	16	-	82	57	28	24	38	20	103	37	88	15	62	77	57	80
		89%	11%	-%	59%	41%	20%	17%	27%	14%	74%	26%	63%	11%	45%	55%	41%	57%
Video conferencing	14	11	3	-	3	11	3	-	4	*	8	6	8	-	3	11	4	10
	10%	9%	17%	-%	4%	19%	9%	-%	12%	2%	7%	17%	9%	-%	5%	14%	8%	12%
		81%	19%	-%	25%	75%	19%	-%	32%	3%	55%	45%	55%	-%	23%	77%	31%	69%
Don't know	2	2	-	-	*	2	-	-	-	-	2	*	1	*	-	2	1	-
	2%	2%	-%	-%	1%	3%	-%	-%	-%	-%	2%	1%	2%	3%	-%	3%	2%	-%
		100%	-%	-%	19%	81%	-%	-%	-%	-%	81%	19%	63%	19%	-%	100%	63%	-%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 20**

**A3A. Please rank the functions for which your company uses ISDN2/2e in order of importance? RANKED FIRST, SECOND OR THIRD MOST IMPORTANT FUNCTION (MULTI CODE)**

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	Total	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
		LAST YEAR	EVER	NEVER	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%		*a	b	c	d	e	f	*g	h	i	j	*k	l	m	n	*o	p	q	*r
Unweighted total	141	27	81	33	93	33	55	19	104	30	63	11	37	45	37	22	44	50	17
Effective Weighted Sample	98	19	63	19	67	20	35	13	74	21	42	6	29	41	33	16	39	41	14
Total	139	27	76	37	91	33	56	25	103	26	69	13	33	36	30	21	36	43	14
		19%	54%	26%	65%	23%	41%	18%	74%	19%	50%	9%	24%	26%	21%	15%	26%	31%	10%
Incoming calls	79	16	38	24	51	20	31	13	55	15	33	11	20	24	18	10	24	25	9
	57%	60%	51%	66%	56%	61%	55%	52%	54%	59%	48%	85%	60%	67%	62%	49%	67%	58%	66%
		20%	49%	31%	65%	25%	40%	17%	70%	19%	43%	14%	25%	31%	23%	13%	31%	32%	12%
Outgoing calls	67	11	34	23	39	19	24	16	50	9	30	11	16	14	14	9	17	20	6
	48%	39%	45%	62%	43%	58%	43%	65%	48%	34%	43%	87%	48%	39%	46%	44%	47%	47%	44%
		16%	50%	34%	59%	28%	36%	24%	75%	13%	44%	16%	23%	21%	21%	14%	26%	30%	9%
Internet services	64	11	30	22	35	19	25	14	46	11	31	9	14	19	12	8	16	16	8
	46%	41%	40%	61%	38%	58%	44%	57%	44%	44%	45%	68%	41%	52%	41%	38%	44%	37%	57%
		17%	48%	35%	55%	30%	39%	23%	72%	18%	49%	13%	21%	29%	19%	12%	25%	25%	13%
Calls between different sites	38	9	19	9	23	10	10	7	22	14	15	2	11	15	10	7	14	15	5
	27%	34%	26%	25%	26%	30%	19%	27%	21%	54%	22%	18%	35%	42%	33%	32%	38%	34%	39%
		24%	52%	24%	62%	26%	28%	18%	58%	37%	40%	6%	31%	40%	26%	17%	37%	40%	14%
Fax services	33	4	24	5	25	5	19	8	26	7	26	1	3	2	5	3	3	3	3
	24%	13%	32%	15%	28%	16%	34%	32%	25%	28%	38%	7%	8%	6%	16%	13%	9%	7%	19%
		11%	73%	16%	77%	16%	58%	24%	78%	22%	80%	3%	8%	7%	15%	8%	10%	10%	8%
Data services	29	5	19	5	18	8	12	3	21	7	15	*	7	11	8	5	9	9	4
	21%	20%	25%	13%	20%	24%	21%	12%	21%	29%	21%	3%	23%	32%	27%	22%	25%	21%	31%
		19%	64%	17%	64%	27%	42%	10%	74%	26%	51%	1%	26%	40%	29%	16%	32%	32%	15%
Security/alarm systems	24	5	14	4	21	2	9	2	20	3	11	-	9	8	4	6	6	11	2
	17%	20%	19%	11%	23%	7%	15%	9%	20%	11%	15%	-%	26%	23%	15%	29%	18%	26%	12%
		23%	60%	17%	87%	9%	36%	9%	86%	12%	45%	-%	37%	35%	19%	25%	28%	48%	7%
Card payments	21	10	10	1	17	3	8	2	19	1	9	1	7	6	7	3	7	9	1
	15%	36%	13%	2%	18%	9%	15%	7%	19%	5%	13%	12%	22%	17%	24%	15%	20%	22%	6%
		47%	49%	4%	81%	14%	41%	9%	94%	6%	43%	7%	35%	29%	35%	15%	35%	46%	4%
Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																			

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 20

A3A. Please rank the functions for which your company uses ISDN2/2e in order of importance? RANKED FIRST, SECOND OR THIRD MOST IMPORTANT FUNCTION (MULTI CODE)

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%		*a	b	c	d	e	f	*g	h	i	j	*k	l	m	n	*o	p	q	*r
Unweighted total	141	27	81	33	93	33	55	19	104	30	63	11	37	45	37	22	44	50	17
Effective Weighted Sample	98	19	63	19	67	20	35	13	74	21	42	6	29	41	33	16	39	41	14
Total	139	27	76	37	91	33	56	25	103	26	69	13	33	36	30	21	36	43	14
		19%	54%	26%	65%	23%	41%	18%	74%	19%	50%	9%	24%	26%	21%	15%	26%	31%	10%
Video conferencing	14	1	9	4	9	3	3	6	9	5	9	-	2	2	3	3	2	4	1
	10%	3%	12%	12%	9%	10%	6%	23%	9%	18%	13%	-%	7%	6%	9%	13%	5%	8%	9%
		6%	63%	31%	62%	22%	23%	42%	65%	32%	65%	-%	17%	16%	19%	19%	13%	26%	9%
Don't know	2	*	-	2	*	-	2	*	*	-	2	*	-	-	-	-	-	-	-
	2%	2%	-%	5%	*%	-%	3%	2%	*%	-%	3%	3%	-%	-%	-%	-%	-%	-%	-%
		19%	-%	81%	19%	-%	81%	19%	19%	-%	81%	19%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 21

A3BA. Please rank the functions for which your company uses ISDN30 in order of importance? FIRST MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use ISN30 (and mostly use an ISDN service)

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											
	Total	UNDER			OVER				ISDN2	ISDN30 ONLY	ISDN2 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP SWITCHED		IP NOT SWITCHED	ANY IP
		1-49	50-249	250+	£1M	£1M-£20M	£21M-£100M	£100M									ISDN	ISDN		
Significance Level: 95%		*a	b	c	*d	e	f	g	h	i	*j	k	l	*m	n	o	p	q	*r	s
Unweighted total	137	25	32	79	16	37	45	37	61	137	-	76	61	-	43	61	61	52	8	61
Effective Weighted Sample	133	25	32	79	16	36	44	36	60	133	-	74	60	-	42	60	60	51	8	60
Total	122	26	33	62	16	35	41	29	52	122	-	70	52	-	37	54	54	47	7	54
		22%	27%	51%	13%	29%	33%	24%	43%	100%	-%	57%	43%	-%	30%	45%	45%	38%	6%	45%
Incoming calls	44	9	14	21	4	14	15	12	16	44	-	29	16	-	12	21	21	18	3	21
	36%	36%	44%	33%	27%	39%	36%	42%	30%	36%	-%	42%	30%	-%	33%	38%	38%	38%	42%	38%
		21%	32%	46%	10%	30%	33%	27%	35%	100%	-%	65%	35%	-%	27%	47%	47%	40%	6%	47%
Internet services	24	5	8	10	4	7	9	4	11	24	-	13	11	-	5	7	7	6	1	7
	19%	20%	25%	16%	25%	20%	22%	14%	20%	19%	-%	19%	20%	-%	14%	13%	13%	14%	12%	13%
		22%	35%	43%	17%	30%	37%	17%	45%	100%	-%	55%	45%	-%	22%	31%	31%	27%	3%	31%
Calls between different sites	14	4	3	7	4	7	2	2	6	14	-	8	6	-	5	7	7	6	-	7
	12%	16%	9%	11%	23%	19%	4%	8%	11%	12%	-%	12%	11%	-%	14%	13%	13%	14%	-%	13%
		29%	21%	49%	26%	47%	11%	16%	41%	100%	-%	59%	41%	-%	36%	51%	51%	44%	-%	51%
Outgoing calls	12	3	1	8	-	4	5	2	6	12	-	6	6	-	5	6	6	5	1	6
	10%	12%	3%	13%	-%	11%	12%	8%	12%	10%	-%	8%	12%	-%	13%	11%	11%	11%	12%	11%
		26%	9%	66%	-%	32%	41%	20%	52%	100%	-%	48%	52%	-%	39%	48%	48%	41%	7%	48%
Fax services	7	1	3	3	-	2	4	2	5	7	-	2	5	-	4	5	5	5	1	5
	6%	4%	9%	5%	-%	5%	10%	6%	10%	6%	-%	3%	10%	-%	12%	10%	10%	10%	12%	10%
		15%	42%	43%	-%	26%	53%	21%	71%	100%	-%	29%	71%	-%	60%	74%	74%	63%	11%	74%
Data services	7	-	1	6	-	1	3	2	5	7	-	2	5	-	3	4	4	3	1	4
	6%	-%	3%	10%	-%	2%	8%	8%	10%	6%	-%	3%	10%	-%	9%	8%	8%	7%	12%	8%
		-%	14%	86%	-%	11%	46%	32%	68%	100%	-%	32%	68%	-%	46%	57%	57%	46%	11%	57%
Security/alarm systems	7	2	1	4	4	-	1	2	3	7	-	4	3	-	2	3	3	2	1	3
	6%	8%	3%	6%	25%	-%	2%	8%	5%	6%	-%	6%	5%	-%	5%	5%	5%	4%	12%	5%
		30%	15%	56%	55%	-%	11%	33%	38%	100%	-%	62%	38%	-%	27%	38%	38%	27%	11%	38%
Card payments	4	1	1	2	-	1	2	1	1	4	-	3	1	-	-	1	1	1	-	1
	3%	4%	3%	3%	-%	3%	4%	3%	2%	3%	-%	4%	2%	-%	-%	2%	2%	2%	-%	2%
		30%	28%	42%	-%	30%	49%	21%	21%	100%	-%	79%	21%	-%	-%	28%	28%	28%	-%	28%
Video conferencing	2	-	-	2	-	-	1	1	-	2	-	2	-	-	-	-	-	-	-	-
	1%	-%	-%	3%	-%	-%	2%	3%	-%	1%	-%	2%	-%	-%	-%	-%	-%	-%	-%	-%
		-%	-%	100%	-%	-%	50%	50%	-%	100%	-%	100%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 21

A3BA. Please rank the functions for which your company uses ISDN30 in order of importance? FIRST MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use ISN30 (and mostly use an ISDN service)

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	b	*c	d	*e	f	g	h	*i	j	k	l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	137	43	94	-	40	21	83	54	40	21	105	32	94	11	66	71	40	94
Effective Weighted Sample	133	42	91	-	40	21	80	53	39	21	103	30	92	11	64	70	38	93
Total	122	36	85	-	33	19	73	49	36	19	93	29	84	9	60	61	38	81
		30%	70%	-%	27%	15%	60%	40%	29%	15%	76%	24%	69%	8%	50%	50%	31%	66%
Incoming calls	44	14	31	-	13	3	31	13	16	5	35	9	32	3	20	25	14	29
	36%	37%	36%	-%	38%	16%	43%	27%	44%	26%	38%	32%	39%	29%	33%	40%	36%	36%
		31%	69%	-%	28%	7%	70%	30%	36%	11%	79%	21%	73%	6%	44%	56%	31%	64%
Internet services	24	7	16	-	4	6	13	11	3	4	16	7	16	1	11	12	6	17
	19%	20%	19%	-%	13%	33%	18%	22%	8%	24%	18%	26%	19%	9%	19%	20%	15%	21%
		31%	69%	-%	19%	26%	55%	45%	12%	19%	69%	31%	65%	3%	48%	52%	24%	71%
Calls between different sites	14	3	11	-	3	3	6	9	5	3	9	5	9	1	9	5	8	6
	12%	9%	13%	-%	9%	15%	8%	18%	13%	15%	10%	17%	10%	9%	16%	8%	21%	8%
																	q	
		22%	78%	-%	22%	19%	41%	59%	31%	19%	66%	34%	60%	5%	66%	34%	56%	44%
Outgoing calls	12	5	7	-	6	1	8	4	3	3	9	3	9	1	6	7	3	9
	10%	13%	9%	-%	17%	4%	11%	9%	7%	17%	10%	9%	10%	9%	9%	11%	8%	11%
		39%	61%	-%	46%	7%	64%	36%	21%	26%	78%	22%	71%	7%	46%	54%	26%	74%
Fax services	7	3	5	-	2	3	5	3	4	2	6	1	6	-	4	3	2	5
	6%	7%	6%	-%	5%	18%	7%	5%	10%	10%	7%	4%	8%	-%	7%	6%	5%	7%
		35%	65%	-%	25%	46%	65%	35%	49%	25%	86%	14%	86%	-%	54%	46%	26%	74%
Data services	7	3	4	-	4	1	5	2	3	1	7	1	5	2	3	4	2	6
	6%	9%	5%	-%	13%	4%	7%	5%	9%	4%	7%	3%	6%	17%	5%	7%	4%	7%
		43%	57%	-%	57%	11%	68%	32%	46%	11%	89%	11%	68%	21%	43%	57%	21%	79%
Security/alarm systems	7	2	5	-	1	2	2	6	2	1	5	2	4	1	3	4	2	5
	6%	5%	6%	-%	2%	10%	2%	11%	5%	4%	6%	6%	5%	11%	6%	6%	5%	6%
								f										
		27%	73%	-%	11%	27%	22%	78%	27%	11%	74%	26%	60%	14%	48%	52%	27%	73%
Card payments	4	-	4	-	1	-	3	1	1	-	3	1	3	-	3	1	1	3
	3%	-%	4%	-%	2%	-%	4%	2%	3%	-%	3%	3%	4%	-%	5%	1%	3%	3%
		-%	100%	-%	21%	-%	79%	21%	28%	-%	79%	21%	79%	-%	79%	21%	30%	70%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 21

A3BA. Please rank the functions for which your company uses ISDN30 in order of importance? FIRST MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use ISN30 (and mostly use an ISDN service)

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	b	*c	d	*e	f	g	h	*i	j	k	l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	137	43	94	-	40	21	83	54	40	21	105	32	94	11	66	71	40	94
Effective Weighted Sample	133	42	91	-	40	21	80	53	39	21	103	30	92	11	64	70	38	93
Total	122	36	85	-	33	19	73	49	36	19	93	29	84	9	60	61	38	81
		30%	70%	-%	27%	15%	60%	40%	29%	15%	76%	24%	69%	8%	50%	50%	31%	66%
Video conferencing	2	-	2	-	-	-	1	1	-	-	2	-	-	2	1	1	1	1
	1%	-%	2%	-%	-%	-%	1%	2%	-%	-%	2%	-%	-%	17%	1%	1%	2%	1%
		-%	100%	-%	-%	-%	50%	50%	-%	-%	100%	-%	-%	100%	50%	50%	50%	50%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q



# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 21

A3BA. Please rank the functions for which your company uses ISDN30 in order of importance? FIRST MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use ISN30 (and mostly use an ISDN service)

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%		*a	b	*c	d	*e	f	*g	h	i	j	*k	l	m	n	*o	p	q	*r
Unweighted total	137	26	83	28	95	29	59	17	102	32	64	12	34	47	31	25	36	48	13
Effective Weighted Sample	133	26	80	27	92	28	57	17	99	31	62	12	33	46	30	25	35	47	13
Total	122	22	74	25	83	26	51	16	91	28	56	11	30	42	27	23	31	43	12
		18%	61%	21%	68%	21%	42%	13%	74%	23%	46%	9%	25%	34%	22%	19%	26%	35%	10%
Incoming calls	44	14	19	11	28	10	17	7	33	12	20	4	14	16	11	10	10	16	5
	36%	63%	26%	44%	34%	39%	33%	41%	36%	42%	36%	33%	47%	39%	39%	44%	33%	38%	40%
		32%	43%	25%	64%	23%	38%	15%	73%	27%	45%	8%	32%	36%	24%	23%	23%	36%	10%
Internet services	24	1	17	6	16	4	10	6	19	2	12	5	4	6	2	3	5	5	3
	19%	4%	23%	22%	19%	14%	20%	37%	21%	8%	21%	45%	13%	14%	7%	11%	15%	11%	22%
		3%	73%	24%	68%	16%	44%	26%	81%	10%	49%	20%	16%	24%	8%	11%	20%	20%	11%
Calls between different sites	14	2	12	1	11	2	6	1	12	2	6	1	2	5	4	5	3	5	2
	12%	7%	16%	4%	14%	8%	12%	5%	14%	7%	11%	7%	5%	13%	16%	20%	8%	12%	18%
		11%	82%	7%	79%	14%	44%	5%	86%	14%	44%	5%	11%	37%	30%	33%	18%	37%	14%
Outgoing calls	12	2	9	2	9	3	5	1	8	4	6	1	3	4	2	2	4	5	1
	10%	7%	12%	8%	10%	13%	10%	7%	9%	14%	10%	7%	11%	9%	9%	8%	13%	12%	7%
		13%	71%	16%	71%	29%	43%	9%	67%	33%	46%	7%	28%	33%	20%	15%	33%	41%	7%
Fax services	7	2	5	1	7	-	2	-	7	-	2	-	1	5	3	1	5	5	1
	6%	7%	7%	3%	9%	-%	4%	-%	8%	-%	3%	-%	3%	11%	11%	3%	15%	11%	7%
		21%	68%	11%	100%	-%	26%	-%	100%	-%	26%	-%	11%	63%	39%	11%	63%	63%	11%
Data services	7	2	4	2	5	2	2	1	6	1	3	-	3	4	2	1	3	4	-
	6%	7%	6%	6%	6%	6%	5%	5%	6%	3%	6%	-%	11%	10%	9%	3%	11%	10%	-%
		21%	57%	21%	68%	21%	32%	11%	79%	11%	43%	-%	46%	57%	32%	11%	46%	57%	-%
Security/alarm systems	7	1	4	2	3	3	4	-	2	5	4	-	2	1	3	1	2	2	1
	6%	5%	6%	6%	4%	11%	9%	-%	3%	17%	8%	-%	6%	2%	10%	5%	5%	4%	7%
		16%	62%	22%	49%	40%	62%	-%	33%	67%	62%	-%	27%	11%	38%	16%	22%	27%	11%
Card payments	4	-	3	1	2	2	2	1	3	1	2	1	1	1	-	1	-	1	-
	3%	-%	4%	3%	3%	6%	4%	5%	3%	3%	3%	7%	3%	2%	-%	4%	-%	2%	-%
		-%	79%	21%	58%	42%	51%	21%	79%	21%	51%	21%	28%	28%	-%	28%	-%	28%	-%
Columns Tested:	a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																		

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 21

A3BA. Please rank the functions for which your company uses ISDN30 in order of importance? FIRST MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use ISN30 (and mostly use an ISDN service)

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
								UP TO 3 YEARS	4+ YEARS						UP TO 2 YEARS	OVER 2 YEARS			
	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK			YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX			YES	NO/DK	
Significance Level: 95%	Total	*a	b	*c	d	*e	f	*g	h	i	j	*k	l	m	n	*o	p	q	*r
Unweighted total	137	26	83	28	95	29	59	17	102	32	64	12	34	47	31	25	36	48	13
Effective Weighted Sample	133	26	80	27	92	28	57	17	99	31	62	12	33	46	30	25	35	47	13
Total	122	22	74	25	83	26	51	16	91	28	56	11	30	42	27	23	31	43	12
		18%	61%	21%	68%	21%	42%	13%	74%	23%	46%	9%	25%	34%	22%	19%	26%	35%	10%
Video conferencing	2	-	1	1	1	1	2	-	-	2	2	-	-	-	-	-	-	-	-
	1%	-%	1%	3%	1%	3%	3%	-%	-%	6%	3%	-%	-%	-%	-%	-%	-%	-%	-%
		-%	50%	50%	50%	50%	100%	-%	-%	100%	100%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 22

A3BB. Please rank the functions for which your company uses ISDN30 in order of importance? SECOND MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use ISN30 (and mostly use an ISDN service)

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											
	Total	1-49 *a	50-249 b	250+ c	UNDER				ISDN2 h	ISDN30 i	ISDN2 ONLY *j	ISDN30 ONLY k	BOTH ISDN l	IP NOT ISDN *m	ISDN2 & IP n	ISDN30 & IP o	ISDN & IP p	IP	IP NOT	ANY
					£1M *d	£1M- £20M e	£21M-£100M f	OVER £100M g										SWITCHED q	SWITCHED *r	
Significance Level: 95%																				
Unweighted total	137	25	32	79	16	37	45	37	61	137	-	76	61	-	43	61	61	52	8	61
Effective Weighted Sample	133	25	32	79	16	36	44	36	60	133	-	74	60	-	42	60	60	51	8	60
Total	122	26	33	62	16	35	41	29	52	122	-	70	52	-	37	54	54	47	7	54
		22%	27%	51%	13%	29%	33%	24%	43%	100%	-%	57%	43%	-%	30%	45%	45%	38%	6%	45%
Outgoing calls	30	5	10	14	2	10	8	10	8	30	-	22	8	-	8	13	13	11	2	13
	24%	19%	31%	23%	13%	28%	20%	34%	15%	24%	-%	32% hl	15%	-%	21%	23%	23%	23%	27%	23%
		17%	35%	48%	7%	33%	27%	33%	26%	100%	-%	74%	26%	-%	26%	43%	43%	37%	6%	43%
Security/alarm systems	15	2	5	8	-	6	6	2	7	15	-	8	7	-	4	4	4	4	-	4
	12%	8%	16%	13%	-%	18%	16%	8%	13%	12%	-%	12%	13%	-%	12%	8%	8%	9%	-%	8%
		14%	34%	52%	-%	42%	43%	16%	45%	100%	-%	55%	45%	-%	29%	29%	29%	29%	-%	29%
Card payments	13	4	2	7	1	4	6	2	9	13	-	4	9	-	4	6	6	4	1	6
	11%	16%	6%	11%	6%	12%	14%	8%	17%	11%	-%	6%	17%	-%	12%	11%	11%	9%	12%	11%
		32%	15%	53%	7%	32%	43%	18%	67%	100%	-%	33%	67%	-%	33%	46%	46%	33%	6%	46%
Fax services	11	2	3	6	3	1	4	3	4	11	-	7	4	-	4	8	8	8	-	8
	9%	8%	9%	9%	20%	2%	9%	11%	8%	9%	-%	10%	8%	-%	11%	15%	15%	17%	-%	15%
		20%	29%	51%	29%	7%	34%	29%	37%	100%	-%	63%	37%	-%	37%	74%	74%	74%	-%	74%
Internet services	10	-	3	7	-	-	6	3	8	10	-	2	8	-	6	7	7	6	1	7
	8%	-%	9%	11%	-%	-%	15% e	11% e	16% k	8%	-%	3%	16% k	-%	16% k	13% k	13% k	13% k	12% k	13% k
		-%	30%	70%	-%	-%	61%	31%	82%	100%	-%	18%	82%	-%	59%	69%	69%	61%	8%	69%
Incoming calls	10	2	3	5	1	1	5	2	5	10	-	5	5	-	5	7	7	5	2	7
	8%	8%	9%	8%	5%	3%	12%	8%	10%	8%	-%	7%	10%	-%	14%	13%	13%	12%	23%	13%
		20%	32%	48%	8%	10%	50%	24%	53%	100%	-%	47%	53%	-%	53%	72%	72%	56%	16%	72%
Data services	7	-	2	5	1	2	1	3	2	7	-	4	2	-	2	4	4	4	1	4
	6%	-%	6%	8%	5%	5%	3%	11%	5%	6%	-%	6%	5%	-%	6%	8%	8%	8%	12%	8%
		-%	30%	70%	12%	27%	15%	46%	35%	100%	-%	65%	35%	-%	35%	65%	65%	54%	12%	65%
Calls between different sites	4	1	1	2	1	1	1	1	2	4	-	2	2	-	1	2	2	2	-	2
	3%	4%	3%	3%	7%	2%	3%	3%	3%	3%	-%	3%	3%	-%	3%	3%	3%	4%	-%	3%
		30%	28%	42%	30%	21%	28%	21%	49%	100%	-%	51%	49%	-%	28%	49%	49%	49%	-%	49%

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 22

A3BB. Please rank the functions for which your company uses ISDN30 in order of importance? SECOND MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use ISN30 (and mostly use an ISDN service)

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP SWITCHED	IP NOT SWITCHED	ANY IP
					£1M	£1M-£20M	£21M-£100M	OVER £100M										ISDN	ISDN	
Significance Level: 95%		*a	b	c	*d	e	f	g	h	i	*j	k	l	*m	n	o	p	q	*r	s
Unweighted total	137	25	32	79	16	37	45	37	61	137	-	76	61	-	43	61	61	52	8	61
Effective Weighted Sample	133	25	32	79	16	36	44	36	60	133	-	74	60	-	42	60	60	51	8	60
Total	122	26	33	62	16	35	41	29	52	122	-	70	52	-	37	54	54	47	7	54
		22%	27%	51%	13%	29%	33%	24%	43%	100%	-%	57%	43%	-%	30%	45%	45%	38%	6%	45%
Video conferencing	2	-	-	2	1	-	-	1	1	2	-	1	1	-	-	-	-	-	-	-
	1%	-%	-%	3%	5%	-%	-%	3%	2%	1%	-%	1%	2%	-%	-%	-%	-%	-%	-%	-%
		-%	-%	100%	50%	-%	-%	50%	50%	100%	-%	50%	50%	-%	-%	-%	-%	-%	-%	-%
Don't know/ None given	21	10	3	8	6	10	3	1	6	21	-	14	6	-	2	3	3	2	1	3
	17%	37%	9%	13%	38%	30%	8%	3%	12%	17%	-%	21%	12%	-%	5%	5%	5%	4%	15%	5%
		47%	15%	38%	29%	fg 50%	16%	4%	30%	opqs 100%	-%	nopqs 70%	30%	-%	9%	14%	14%	9%	5%	14%

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 22

A3BB. Please rank the functions for which your company uses ISDN30 in order of importance? SECOND MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use ISN30 (and mostly use an ISDN service)

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN30			ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		ISDN2	ISDN30	IP														
Significance Level: 95%		a	b	*c	d	*e	f	g	h	*i	j	k	l	*m	n	o	p	q
Unweighted total	137	43	94	-	40	21	83	54	40	21	105	32	94	11	66	71	40	94
Effective Weighted Sample	133	42	91	-	40	21	80	53	39	21	103	30	92	11	64	70	38	93
Total	122	36	85	-	33	19	73	49	36	19	93	29	84	9	60	61	38	81
		30%	70%	-%	27%	15%	60%	40%	29%	15%	76%	24%	69%	8%	50%	50%	31%	66%
Outgoing calls	30	7	23	-	7	1	22	7	9	4	21	8	19	2	10	20	10	19
	24%	19%	27%	-%	20%	4%	30%	15%	24%	22%	23%	29%	23%	26%	16%	33%	25%	24%
		23%	77%	-%	23%	3%	75%	25%	29%	14%	72%	28%	64%	8%	32%	68%	32%	65%
Security/alarm systems	15	3	12	-	2	5	7	8	2	3	11	4	10	1	10	5	3	12
	12%	9%	14%	-%	5%	28%	10%	16%	5%	14%	12%	14%	12%	9%	17%	8%	8%	15%
		22%	78%	-%	10%	34%	47%	53%	12%	17%	74%	26%	69%	5%	67%	33%	21%	79%
Card payments	13	6	7	-	4	5	6	7	4	3	10	3	10	1	8	6	6	7
	11%	17%	9%	-%	13%	25%	8%	15%	10%	14%	11%	10%	12%	9%	13%	9%	16%	9%
		46%	54%	-%	31%	35%	45%	55%	27%	19%	78%	22%	72%	6%	57%	43%	45%	55%
Fax services	11	3	8	-	4	-	7	4	7	1	10	1	9	1	6	5	2	9
	9%	9%	9%	-%	12%	-%	10%	7%	19%	6%	10%	4%	10%	11%	10%	8%	6%	11%
		29%	71%	-%	37%	-%	66%	34%	64%	10%	90%	10%	81%	9%	54%	46%	20%	80%
Internet services	10	7	4	-	8	1	7	3	5	2	9	2	9	-	4	6	1	9
	8%	18%	4%	-%	23%	4%	10%	6%	13%	13%	9%	5%	10%	-%	7%	10%	2%	12%
		b			g													
		64%	36%	-%	74%	8%	69%	31%	46%	23%	85%	15%	85%	-%	39%	61%	8%	92%
Incoming calls	10	3	6	-	3	3	8	2	5	2	7	3	6	1	4	6	2	8
	8%	9%	8%	-%	8%	14%	11%	4%	15%	8%	8%	9%	8%	9%	6%	10%	5%	10%
		35%	65%	-%	27%	27%	82%	18%	56%	16%	74%	26%	66%	8%	39%	61%	20%	80%
Data services	7	-	7	-	2	1	5	2	2	3	4	3	4	-	4	2	3	4
	6%	-%	8%	-%	5%	4%	7%	4%	5%	14%	5%	9%	5%	-%	7%	4%	7%	5%
		-%	100%	-%	23%	12%	73%	27%	27%	38%	62%	38%	62%	-%	65%	35%	38%	62%
Calls between different sites	4	1	3	-	2	-	3	1	2	-	4	-	4	-	2	2	1	2
	3%	2%	3%	-%	5%	-%	4%	2%	5%	-%	4%	-%	4%	-%	3%	3%	2%	2%
		21%	79%	-%	49%	-%	70%	30%	49%	-%	100%	-%	100%	-%	51%	49%	21%	49%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 22

A3BB. Please rank the functions for which your company uses ISDN30 in order of importance? SECOND MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use ISN30 (and mostly use an ISDN service)

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	b	*c	d	*e	f	g	h	*i	j	k	l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	137	43	94	-	40	21	83	54	40	21	105	32	94	11	66	71	40	94
Effective Weighted Sample	133	42	91	-	40	21	80	53	39	21	103	30	92	11	64	70	38	93
Total	122	36	85	-	33	19	73	49	36	19	93	29	84	9	60	61	38	81
		30%	70%	-%	27%	15%	60%	40%	29%	15%	76%	24%	69%	8%	50%	50%	31%	66%
Video conferencing	2	1	1	-	-	1	1	1	-	-	2	-	2	-	2	-	-	2
	1%	2%	1%	-%	-%	4%	1%	2%	-%	-%	2%	-%	2%	-%	3%	-%	-%	2%
		50%	50%	-%	-%	50%	50%	50%	-%	-%	100%	-%	100%	-%	100%	-%	-%	100%
Don't know/ None given	21	6	15	-	3	3	7	14	1	2	15	6	11	3	11	9	11	9
	17%	15%	18%	-%	9%	17%	10%	28%	3%	10%	16%	20%	14%	38%	19%	15%	29%	11%
							dfh										q	
		27%	73%	-%	15%	15%	34%	66%	5%	9%	72%	28%	55%	17%	56%	44%	53%	41%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 22

A3BB. Please rank the functions for which your company uses ISDN30 in order of importance? SECOND MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use ISN30 (and mostly use an ISDN service)

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO		YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
									3 YEARS	4+ YEARS									
Significance Level: 95%		*a	b	*c	d	*e	f	*g	h	i	j	*k	l	m	n	*o	p	q	*r
Unweighted total	137	26	83	28	95	29	59	17	102	32	64	12	34	47	31	25	36	48	13
Effective Weighted Sample	133	26	80	27	92	28	57	17	99	31	62	12	33	46	30	25	35	47	13
Total	122	22	74	25	83	26	51	16	91	28	56	11	30	42	27	23	31	43	12
		18%	61%	21%	68%	21%	42%	13%	74%	23%	46%	9%	25%	34%	22%	19%	26%	35%	10%
Outgoing calls	30	8	12	10	16	8	12	5	21	9	13	4	8	8	8	7	6	9	4
	24%	35%	16%	39%	19%	31%	24%	29%	23%	31%	24%	33%	26%	19%	29%	30%	18%	21%	33%
		26%	40%	33%	53%	27%	41%	16%	71%	29%	45%	12%	26%	27%	26%	23%	19%	30%	13%
Security/alarm systems	15	1	12	2	13	1	8	3	11	3	9	2	3	4	1	1	4	4	-
	12%	5%	16%	8%	16%	4%	16%	17%	12%	12%	16%	18%	11%	9%	3%	3%	12%	10%	-%
		7%	81%	13%	86%	7%	53%	18%	70%	22%	58%	13%	22%	24%	5%	5%	24%	29%	-%
Card payments	13	3	6	4	9	2	6	1	11	2	7	-	3	4	3	3	3	5	1
	11%	16%	8%	15%	11%	7%	12%	7%	12%	6%	13%	-%	11%	10%	9%	12%	11%	12%	9%
		26%	46%	28%	66%	14%	46%	8%	81%	14%	54%	-%	25%	31%	19%	21%	25%	38%	8%
Fax services	11	2	8	1	9	2	2	1	8	3	3	-	3	8	5	3	5	7	1
	9%	7%	11%	4%	10%	8%	3%	6%	9%	10%	5%	-%	11%	19%	19%	12%	17%	17%	7%
		15%	76%	10%	81%	19%	17%	10%	74%	26%	26%	-%	29%	74%	49%	25%	49%	66%	7%
Internet services	10	4	4	2	8	2	2	1	9	2	3	-	5	7	4	2	5	7	-
	8%	19%	6%	6%	9%	9%	5%	5%	10%	6%	6%	-%	17%	17%	13%	8%	17%	16%	-%
		41%	43%	15%	77%	23%	23%	8%	85%	15%	31%	-%	51%	69%	36%	18%	51%	69%	-%
Incoming calls	10	1	6	3	7	3	2	1	7	2	2	1	3	5	4	3	4	4	3
	8%	4%	9%	10%	9%	10%	3%	6%	8%	8%	4%	7%	10%	11%	15%	11%	14%	9%	27%
		8%	66%	26%	74%	26%	18%	10%	76%	24%	20%	8%	32%	48%	40%	27%	45%	40%	32%
Data services	7	1	4	2	4	3	2	-	5	2	2	1	-	3	2	3	2	3	2
	6%	4%	6%	6%	5%	10%	5%	-%	5%	6%	3%	7%	-%	8%	8%	11%	6%	6%	16%
		12%	65%	23%	62%	38%	35%	-%	73%	27%	23%	12%	-%	50%	30%	38%	27%	38%	27%
Calls between different sites	4	-	4	-	2	1	2	-	4	-	2	-	2	2	-	1	1	2	-
	3%	-%	5%	-%	2%	3%	4%	-%	4%	-%	3%	-%	6%	4%	-%	3%	3%	4%	-%
		-%	100%	-%	49%	21%	51%	-%	100%	-%	51%	-%	49%	49%	-%	21%	28%	49%	-%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 22

A3BB. Please rank the functions for which your company uses ISDN30 in order of importance? SECOND MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use ISN30 (and mostly use an ISDN service)

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
								UP TO 3 YEARS	4+ YEARS						UP TO 2 YEARS	OVER 2 YEARS			
	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK			YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX			YES	NO/DK	
	Significance Level: 95%	Total	*a	b	*c	d	*e	f	*g	h	i	j	*k	l	m	n	*o	p	q
Unweighted total	137	26	83	28	95	29	59	17	102	32	64	12	34	47	31	25	36	48	13
Effective Weighted Sample	133	26	80	27	92	28	57	17	99	31	62	12	33	46	30	25	35	47	13
Total	122	22	74	25	83	26	51	16	91	28	56	11	30	42	27	23	31	43	12
		18%	61%	21%	68%	21%	42%	13%	74%	23%	46%	9%	25%	34%	22%	19%	26%	35%	10%
Video conferencing	2	1	1	-	2	-	2	-	2	-	2	-	-	-	-	-	-	-	-
	1%	4%	1%	-%	2%	-%	3%	-%	2%	-%	3%	-%	-%	-%	-%	-%	-%	-%	-%
		50%	50%	-%	100%	-%	100%	-%	100%	-%	100%	-%	-%	-%	-%	-%	-%	-%	-%
Don't know/ None given	21	2	16	3	14	5	13	5	14	6	14	4	2	1	1	2	1	2	1
	17%	9%	21%	12%	17%	18%	25%	30%	15%	20%	25%	35%	7%	2%	4%	9%	3%	4%	9%
		9%	77%	14%	68%	23%	63%	23%	67%	27%	68%	18%	10%	5%	5%	10%	4%	9%	5%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r



# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 23

A3BC. Please rank the functions for which your company uses ISDN30 in order of importance? THIRD MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use ISN30 (and mostly use an ISDN service)

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP SWITCHED	IP NOT SWITCHED	ANY IP
					£1M	£1M-£20M	£21M-£100M	OVER £100M										ISDN	ISDN	
Significance Level: 95%		*a	b	c	*d	e	f	g	h	i	*j	k	l	*m	n	o	p	q	*r	s
Unweighted total	137	25	32	79	16	37	45	37	61	137	-	76	61	-	43	61	61	52	8	61
Effective Weighted Sample	133	25	32	79	16	36	44	36	60	133	-	74	60	-	42	60	60	51	8	60
Total	122	26	33	62	16	35	41	29	52	122	-	70	52	-	37	54	54	47	7	54
		22%	27%	51%	13%	29%	33%	24%	43%	100%	-%	57%	43%	-%	30%	45%	45%	38%	6%	45%
Internet services	17	5	4	8	2	6	4	5	5	17	-	12	5	-	4	10	10	9	1	10
	14%	20%	13%	13%	14%	17%	11%	17%	10%	14%	-%	17%	10%	-%	11%	18%	18%	20%	12%	18%
		31%	24%	45%	13%	34%	25%	27%	31%	100%	-%	69%	31%	-%	24%	57%	57%	53%	5%	57%
Data services	16	1	9	6	-	4	11	1	8	16	-	8	8	-	5	9	9	8	1	9
	13%	4%	28%	9%	-%	11%	28%	3%	15%	13%	-%	11%	15%	-%	14%	17%	17%	18%	15%	17%
		6%	c	35%	-%	24%	g	5%	50%	100%	-%	50%	50%	-%	33%	59%	59%	53%	7%	59%
Calls between different sites	12	2	1	9	1	4	2	6	4	12	-	8	4	-	4	6	6	5	1	6
	10%	8%	3%	14%	6%	10%	4%	19%	8%	10%	-%	11%	8%	-%	11%	11%	11%	11%	12%	11%
		17%	9%	74%	8%	31%	13%	47%	36%	100%	-%	64%	36%	-%	36%	51%	51%	44%	7%	51%
Outgoing calls	11	3	2	6	2	1	3	5	5	11	-	6	5	-	4	5	5	3	2	5
	9%	12%	6%	9%	14%	3%	7%	17%	10%	9%	-%	8%	10%	-%	11%	9%	9%	6%	35%	9%
		30%	19%	51%	20%	10%	26%	44%	46%	100%	-%	54%	46%	-%	39%	46%	46%	24%	22%	46%
Security/alarm systems	11	1	4	6	-	2	4	5	6	11	-	5	6	-	5	6	6	5	-	6
	9%	4%	13%	9%	-%	5%	10%	17%	12%	9%	-%	7%	12%	-%	14%	11%	11%	11%	-%	11%
		9%	39%	52%	-%	17%	36%	46%	56%	100%	-%	44%	56%	-%	49%	59%	59%	49%	-%	59%
Card payments	10	1	3	6	-	3	4	2	5	10	-	5	5	-	3	4	4	4	1	4
	8%	4%	9%	9%	-%	8%	9%	8%	10%	8%	-%	7%	10%	-%	9%	8%	8%	8%	12%	8%
		10%	32%	57%	-%	29%	38%	25%	52%	100%	-%	48%	52%	-%	35%	46%	46%	38%	8%	46%
Incoming calls	6	1	2	3	1	-	3	2	1	6	-	5	1	-	-	1	1	1	-	1
	5%	4%	6%	5%	6%	-%	7%	8%	2%	5%	-%	8%	2%	-%	-%	2%	2%	2%	-%	2%
		16%	33%	51%	16%	-%	46%	38%	13%	100%	-%	87%	13%	-%	-%	17%	17%	17%	-%	17%
Fax services	5	-	-	5	-	-	3	2	4	5	-	1	4	-	2	2	2	2	-	2
	4%	-%	-%	8%	-%	-%	8%	6%	8%	4%	-%	1%	8%	-%	6%	4%	4%	5%	-%	4%
		-%	-%	100%	-%	-%	67%	33%	83%	100%	-%	17%	83%	-%	50%	50%	50%	50%	-%	50%

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 23

A3BC. Please rank the functions for which your company uses ISDN30 in order of importance? THIRD MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use ISN30 (and mostly use an ISDN service)

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											ANY IP
	Total	1-49	50-249	250+	UNDER £1M	£1M- £20M	£21M-£10 0M	OVER £100M	ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP SWITCHED ISDN	IP NOT SWITCHED ISDN	
Significance Level: 95%		*a	b	c	*d	e	f	g	h	i	*j	k	l	*m	n	o	p	q	*r	s
Unweighted total	137	25	32	79	16	37	45	37	61	137	-	76	61	-	43	61	61	52	8	61
Effective Weighted Sample	133	25	32	79	16	36	44	36	60	133	-	74	60	-	42	60	60	51	8	60
Total	122	26	33	62	16	35	41	29	52	122	-	70	52	-	37	54	54	47	7	54
		22%	27%	51%	13%	29%	33%	24%	43%	100%	-%	57%	43%	-%	30%	45%	45%	38%	6%	45%
Video conferencing	3	-	1	2	-	-	3	-	2	3	-	1	2	-	1	1	1	1	-	1
	2%	-%	3%	3%	-%	-%	6%	-%	3%	2%	-%	1%	3%	-%	3%	2%	2%	2%	-%	2%
		-%	40%	60%	-%	-%	100%	-%	70%	100%	-%	30%	70%	-%	40%	40%	40%	40%	-%	40%
Don't know/ None given	32	12	6	14	9	16	4	2	12	32	-	20	12	-	7	9	9	8	1	9
	26%	45%	19%	23%	60%	45%	11%	6%	24%	26%	-%	29%	24%	-%	19%	17%	17%	17%	15%	17%
		37%	19%	44%	29%	50%	14%	5%	38%	100%	-%	62%	38%	-%	22%	28%	28%	25%	3%	28%

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 23

A3BC. Please rank the functions for which your company uses ISDN30 in order of importance? THIRD MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use ISN30 (and mostly use an ISDN service)

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN30			ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		ISDN2	IP															
Significance Level: 95%		a	b	*c	d	*e	f	g	h	*i	j	k	l	*m	n	o	p	q
Unweighted total	137	43	94	-	40	21	83	54	40	21	105	32	94	11	66	71	40	94
Effective Weighted Sample	133	42	91	-	40	21	80	53	39	21	103	30	92	11	64	70	38	93
Total	122	36	85	-	33	19	73	49	36	19	93	29	84	9	60	61	38	81
		30%	70%	-%	27%	15%	60%	40%	29%	15%	76%	24%	69%	8%	50%	50%	31%	66%
Internet services	17	4	13	-	4	1	14	4	7	3	14	3	13	1	8	10	6	11
	14%	12%	15%	-%	13%	6%	19%	7%	20%	15%	15%	11%	16%	9%	13%	16%	16%	14%
		25%	75%	-%	24%	6%	79%	21%	41%	16%	82%	18%	77%	5%	44%	56%	34%	66%
Data services	16	3	12	-	4	3	8	8	5	4	12	4	12	-	8	8	4	12
	13%	9%	15%	-%	13%	18%	11%	16%	14%	24%	13%	12%	15%	-%	12%	13%	10%	15%
		22%	78%	-%	28%	22%	49%	51%	31%	28%	77%	23%	77%	-%	48%	52%	24%	76%
Calls between different sites	12	3	9	-	3	2	8	4	5	1	10	2	9	1	5	7	4	7
	10%	7%	11%	-%	8%	8%	10%	9%	14%	6%	11%	5%	11%	9%	8%	12%	10%	9%
		22%	78%	-%	22%	13%	64%	36%	42%	9%	87%	13%	80%	7%	39%	61%	33%	61%
Outgoing calls	11	3	7	-	4	1	8	3	3	2	7	4	7	-	5	6	3	7
	9%	9%	9%	-%	13%	4%	11%	6%	9%	8%	8%	13%	8%	-%	8%	9%	8%	8%
		31%	69%	-%	39%	7%	73%	27%	31%	15%	66%	34%	66%	-%	47%	53%	29%	61%
Security/alarm systems	11	5	6	-	5	1	7	3	5	1	9	2	8	1	5	5	4	7
	9%	14%	7%	-%	15%	5%	10%	7%	15%	4%	9%	7%	9%	9%	9%	9%	9%	9%
		47%	53%	-%	47%	10%	68%	32%	51%	7%	81%	19%	74%	7%	49%	51%	34%	66%
Card payments	10	3	6	-	2	3	4	5	2	3	7	3	7	-	7	2	2	8
	8%	9%	7%	-%	7%	14%	6%	11%	5%	14%	7%	10%	8%	-%	12%	4%	5%	9%
		35%	65%	-%	25%	27%	44%	56%	19%	27%	71%	29%	71%	-%	75%	25%	21%	79%
Incoming calls	6	1	5	-	1	-	5	1	1	-	5	1	4	1	3	4	-	6
	5%	2%	6%	-%	2%	-%	7%	2%	3%	-%	6%	3%	5%	11%	4%	6%	-%	8%
		13%	87%	-%	13%	-%	84%	16%	17%	-%	87%	13%	71%	16%	42%	58%	-%	100%
Fax services	5	4	1	-	4	-	5	-	2	-	4	1	2	2	2	3	-	5
	4%	11%	1%	-%	12%	-%	6%	-%	7%	-%	4%	3%	3%	17%	3%	5%	-%	6%
		b			g													
		83%	17%	-%	83%	-%	100%	-%	50%	-%	83%	17%	50%	33%	33%	67%	-%	100%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 23

A3BC. Please rank the functions for which your company uses ISDN30 in order of importance? THIRD MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use ISN30 (and mostly use an ISDN service)

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
Significance Level: 95%		a	b	*c	d	*e	f	g	h	*i	j	k	l	*m	n	o	p	q
Unweighted total	137	43	94	-	40	21	83	54	40	21	105	32	94	11	66	71	40	94
Effective Weighted Sample	133	42	91	-	40	21	80	53	39	21	103	30	92	11	64	70	38	93
Total	122	36	85	-	33	19	73	49	36	19	93	29	84	9	60	61	38	81
		30%	70%	-%	27%	15%	60%	40%	29%	15%	76%	24%	69%	8%	50%	50%	31%	66%
Video conferencing	3	1	2	-	1	1	3	-	1	-	3	-	3	-	1	2	-	3
	2%	2%	2%	-%	2%	5%	4%	-%	3%	-%	3%	-%	3%	-%	1%	3%	-%	3%
		30%	70%	-%	30%	40%	100%	-%	40%	-%	100%	-%	100%	-%	30%	70%	-%	100%
Don't know/ None given	32	9	23	-	5	7	12	20	4	5	22	10	18	4	18	14	16	15
	26%	24%	27%	-%	15%	39%	17%	41%	10%	29%	24%	36%	21%	46%	30%	23%	41%	19%
							dfh										q	
		28%	72%	-%	15%	23%	38%	62%	12%	17%	68%	32%	54%	13%	56%	44%	49%	48%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 23

A3BC. Please rank the functions for which your company uses ISDN30 in order of importance? THIRD MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use ISN30 (and mostly use an ISDN service)

	SWITCHING ISDN SUPPLIER				CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%		*a	b	*c	d	*e	f	*g	h	i	j	*k	l	m	n	*o	p	q	*r
Unweighted total	137	26	83	28	95	29	59	17	102	32	64	12	34	47	31	25	36	48	13
Effective Weighted Sample	133	26	80	27	92	28	57	17	99	31	62	12	33	46	30	25	35	47	13
Total	122	22	74	25	83	26	51	16	91	28	56	11	30	42	27	23	31	43	12
		18%	61%	21%	68%	21%	42%	13%	74%	23%	46%	9%	25%	34%	22%	19%	26%	35%	10%
Internet services	17	5	9	3	11	4	6	1	14	3	6	1	5	7	5	6	4	10	-
	14%	24%	12%	12%	13%	17%	12%	7%	15%	10%	11%	9%	17%	18%	19%	24%	14%	23%	-%
		30%	53%	17%	64%	26%	36%	6%	79%	17%	37%	6%	30%	42%	30%	32%	25%	57%	-%
Data services	16	1	11	4	11	4	4	3	12	4	6	-	5	9	5	4	5	7	2
	13%	5%	15%	15%	13%	14%	7%	17%	13%	13%	11%	-%	18%	22%	17%	17%	17%	17%	18%
		7%	69%	24%	71%	23%	23%	18%	77%	23%	41%	-%	35%	59%	30%	25%	35%	46%	13%
Calls between different sites	12	3	4	5	6	4	4	2	5	6	4	2	3	3	3	3	3	3	3
	10%	12%	6%	19%	7%	16%	8%	10%	6%	22%	7%	15%	11%	8%	12%	12%	10%	8%	22%
		22%	38%	40%	51%	36%	35%	13%	46%	54%	35%	13%	29%	27%	27%	24%	27%	29%	22%
Outgoing calls	11	2	5	5	6	3	3	3	8	2	5	1	3	3	3	2	3	3	2
	9%	7%	6%	18%	7%	10%	6%	18%	9%	6%	8%	10%	9%	8%	12%	7%	11%	6%	20%
		15%	44%	42%	55%	24%	27%	27%	73%	17%	44%	10%	24%	31%	29%	15%	31%	24%	22%
Security/alarm systems	11	3	5	2	9	-	4	-	9	2	3	1	5	5	3	2	4	5	1
	9%	15%	7%	8%	10%	-%	9%	-%	10%	6%	6%	9%	17%	13%	10%	8%	14%	12%	9%
		32%	49%	19%	81%	-%	41%	-%	83%	17%	32%	9%	49%	49%	25%	17%	42%	49%	10%
Card payments	10	2	7	1	7	3	5	-	7	2	4	1	2	4	2	-	4	4	-
	8%	7%	10%	3%	8%	10%	10%	-%	8%	8%	8%	7%	5%	11%	7%	-%	14%	10%	-%
		16%	75%	8%	73%	27%	54%	-%	75%	25%	46%	8%	16%	46%	19%	-%	46%	46%	-%
Incoming calls	6	-	6	-	4	1	4	1	5	1	5	-	-	1	1	-	1	1	-
	5%	-%	8%	-%	5%	4%	8%	6%	6%	4%	9%	-%	-%	2%	4%	-%	3%	2%	-%
		-%	100%	-%	67%	16%	67%	17%	84%	16%	83%	-%	-%	17%	17%	-%	17%	17%	-%
Fax services	5	3	1	1	4	-	2	-	5	-	2	1	2	2	2	1	2	2	1
	4%	14%	1%	3%	5%	-%	5%	-%	5%	-%	3%	7%	5%	6%	6%	3%	5%	4%	7%
		67%	17%	17%	83%	-%	50%	-%	100%	-%	33%	17%	33%	50%	33%	17%	33%	33%	17%
Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																			

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 23

A3BC. Please rank the functions for which your company uses ISDN30 in order of importance? THIRD MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use ISN30 (and mostly use an ISDN service)

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
								UP TO							UP TO	OVER			
	LAST YEAR	EVER	NEVER	YES	NO	YES	NO/DK	3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	2 YEARS	2 YEARS	YES	NO/DK	
Significance Level: 95%	Total	*a	b	*c	d	*e	f	*g	h	i	j	*k	l	m	n	*o	p	q	*r
Unweighted total	137	26	83	28	95	29	59	17	102	32	64	12	34	47	31	25	36	48	13
Effective Weighted Sample	133	26	80	27	92	28	57	17	99	31	62	12	33	46	30	25	35	47	13
Total	122	22	74	25	83	26	51	16	91	28	56	11	30	42	27	23	31	43	12
		18%	61%	21%	68%	21%	42%	13%	74%	23%	46%	9%	25%	34%	22%	19%	26%	35%	10%
Video conferencing	3	-	3	-	3	-	2	-	3	-	2	-	1	1	-	-	1	1	-
	2%	-%	4%	-%	3%	-%	3%	-%	3%	-%	3%	-%	3%	2%	-%	-%	3%	2%	-%
		-%	100%	-%	100%	-%	60%	-%	100%	-%	60%	-%	40%	40%	-%	-%	40%	40%	-%
Don't know/ None given	32	4	23	6	23	8	16	7	23	8	19	5	4	4	4	7	2	6	3
	26%	17%	31%	22%	27%	29%	32%	42%	25%	29%	33%	42%	13%	10%	15%	29%	8%	15%	24%
		12%	71%	17%	71%	24%	51%	21%	71%	26%	58%	14%	12%	14%	12%	21%	7%	20%	9%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 24**

**A3B. Please rank the functions for which your company uses ISDN30 in order of importance? RANKED FIRST, SECOND OR THIRD MOST IMPORTANT FUNCTION (MULTI CODE)**

Base : Those who use ISN30 (and mostly use an ISDN service)

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											
	Total	UNDER			OVER				ISDN2	ISDN30 ONLY	ISDN2 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP SWITCHED		IP NOT SWITCHED	ANY IP
		1-49	50-249	250+	£1M	£1M-£20M	£21M-£100M	£100M									ISDN	ISDN		
Significance Level: 95%		*a	b	c	*d	e	f	g	h	i	*j	k	l	*m	n	o	p	q	*r	s
Unweighted total	137	25	32	79	16	37	45	37	61	137	-	76	61	-	43	61	61	52	8	61
Effective Weighted Sample	133	25	32	79	16	36	44	36	60	133	-	74	60	-	42	60	60	51	8	60
Total	122	26	33	62	16	35	41	29	52	122	-	70	52	-	37	54	54	47	7	54
		22%	27%	51%	13%	29%	33%	24%	43%	100%	-%	57%	43%	-%	30%	45%	45%	38%	6%	45%
Incoming calls	60	12	20	28	6	15	22	17	22	60	-	39	22	-	17	29	29	24	4	29
	50%	47%	59%	46%	38%	41%	55%	59%	41%	50%	-%	56%	41%	-%	47%	53%	53%	52%	65%	53%
		21%	32%	47%	10%	24%	37%	28%	36%	100%	-%	64%	36%	-%	29%	48%	48%	40%	7%	48%
Outgoing calls	52	11	13	28	4	15	16	17	19	52	-	34	19	-	17	23	23	18	5	23
	43%	43%	41%	44%	27%	42%	39%	59%	36%	43%	-%	48%	36%	-%	45%	43%	43%	39%	74%	43%
		22%	26%	53%	8%	28%	30%	32%	36%	100%	-%	64%	36%	-%	31%	45%	45%	35%	9%	45%
Internet services	51	11	15	25	6	13	19	12	24	51	-	27	24	-	15	24	24	22	2	24
	42%	40%	47%	41%	39%	37%	48%	41%	47%	42%	-%	39%	47%	-%	42%	45%	45%	47%	35%	45%
		21%	30%	49%	12%	25%	38%	23%	47%	100%	-%	53%	47%	-%	30%	47%	47%	43%	5%	47%
Security/alarm systems	33	5	10	17	4	8	11	10	16	33	-	17	16	-	12	13	13	12	1	13
	27%	20%	31%	28%	25%	23%	28%	34%	30%	27%	-%	25%	30%	-%	31%	25%	25%	25%	12%	25%
		16%	31%	53%	12%	25%	34%	29%	47%	100%	-%	53%	47%	-%	35%	41%	41%	35%	2%	41%
Data services	30	1	12	17	1	6	16	6	15	30	-	15	15	-	11	18	18	15	3	18
	25%	4%	38%	27%	5%	18%	38%	22%	29%	25%	-%	21%	29%	-%	30%	33%	33%	33%	39%	33%
		3%	41%	55%	3%	22%	52%	21%	51%	100%	-%	49%	51%	-%	37%	60%	60%	51%	9%	60%
Calls between different sites	30	7	5	17	6	11	4	9	12	30	-	18	12	-	10	15	15	13	1	15
	25%	28%	16%	28%	37%	32%	10%	30%	23%	25%	-%	26%	23%	-%	28%	28%	28%	29%	12%	28%
						f		f												
		25%	17%	58%	19%	37%	14%	29%	40%	100%	-%	60%	40%	-%	35%	51%	51%	45%	3%	51%
Card payments	27	6	6	14	1	8	11	6	15	27	-	12	15	-	8	12	12	9	2	12
	22%	24%	19%	23%	6%	23%	28%	19%	28%	22%	-%	17%	28%	-%	21%	21%	21%	19%	23%	21%
		24%	23%	53%	4%	31%	42%	21%	55%	100%	-%	45%	55%	-%	29%	44%	44%	34%	6%	44%
Fax services	23	3	6	13	3	3	11	6	13	23	-	10	13	-	11	16	16	15	1	16
	19%	12%	19%	22%	20%	8%	26%	22%	25%	19%	-%	14%	25%	-%	29%	29%	29%	32%	12%	29%
						e									k	k	k	k		k
		14%	27%	59%	14%	12%	47%	28%	57%	100%	-%	43%	57%	-%	47%	69%	69%	65%	3%	69%
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																				

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 24**

**A3B. Please rank the functions for which your company uses ISDN30 in order of importance? RANKED FIRST, SECOND OR THIRD MOST IMPORTANT FUNCTION (MULTI CODE)**

Base : Those who use ISN30 (and mostly use an ISDN service)

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP SWITCHED	IP NOT SWITCHED	ANY IP
					£1M	£1M-£20M	£21M-£100M	OVER £100M										ISDN	ISDN	
Significance Level: 95%		*a	b	c	*d	e	f	g	h	i	*j	k	l	*m	n	o	p	q	*r	s
Unweighted total	137	25	32	79	16	37	45	37	61	137	-	76	61	-	43	61	61	52	8	61
Effective Weighted Sample	133	25	32	79	16	36	44	36	60	133	-	74	60	-	42	60	60	51	8	60
Total	122	26	33	62	16	35	41	29	52	122	-	70	52	-	37	54	54	47	7	54
		22%	27%	51%	13%	29%	33%	24%	43%	100%	-%	57%	43%	-%	30%	45%	45%	38%	6%	45%
Video conferencing	6	-	1	5	1	-	3	2	3	6	-	3	3	-	1	1	1	1	-	1
	5%	-%	3%	8%	5%	-%	8%	6%	5%	5%	-%	5%	5%	-%	3%	2%	2%	2%	-%	2%
		-%	18%	82%	14%	-%	59%	27%	45%	100%	-%	55%	45%	-%	18%	18%	18%	18%	-%	18%

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s



# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 24

A3B. Please rank the functions for which your company uses ISDN30 in order of importance? RANKED FIRST, SECOND OR THIRD MOST IMPORTANT FUNCTION (MULTI CODE)

Base : Those who use ISN30 (and mostly use an ISDN service)

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN30			ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		ISDN2	IP															
Significance Level: 95%		a	b	*c	d	*e	f	g	h	*i	j	k	l	*m	n	o	p	q
Unweighted total	137	43	94	-	40	21	83	54	40	21	105	32	94	11	66	71	40	94
Effective Weighted Sample	133	42	91	-	40	21	80	53	39	21	103	30	92	11	64	70	38	93
Total	122	36	85	-	33	19	73	49	36	19	93	29	84	9	60	61	38	81
		30%	70%	-%	27%	15%	60%	40%	29%	15%	76%	24%	69%	8%	50%	50%	31%	66%
Incoming calls	60	18	43	-	16	6	45	16	22	6	48	13	43	4	26	34	16	43
	50%	49%	50%	-%	48%	29%	61%	33%	62%	35%	51%	44%	52%	49%	43%	56%	42%	53%
		30%	70%	-%	26%	9%	74%	26%	37%	11%	79%	21%	72%	7%	43%	57%	26%	71%
Outgoing calls	52	15	38	-	17	2	38	15	15	9	38	15	35	3	20	32	16	35
	43%	41%	44%	-%	50%	13%	52%	30%	41%	47%	41%	51%	41%	34%	33%	53%	42%	43%
		28%	72%	-%	31%	5%	72%	28%	28%	17%	72%	28%	66%	6%	38%	62%	30%	66%
Internet services	51	18	33	-	16	8	34	17	15	10	39	12	38	2	23	28	12	38
	42%	50%	39%	-%	49%	43%	46%	36%	41%	52%	42%	42%	45%	17%	38%	46%	33%	47%
		35%	65%	-%	32%	16%	66%	34%	28%	19%	76%	24%	73%	3%	45%	55%	24%	73%
Security/alarm systems	33	10	23	-	7	8	16	17	9	4	25	8	23	3	19	14	9	24
	27%	28%	27%	-%	22%	43%	22%	35%	26%	22%	27%	27%	27%	28%	31%	23%	23%	30%
		31%	69%	-%	22%	25%	48%	52%	28%	13%	76%	24%	69%	8%	57%	43%	26%	74%
Data services	30	7	23	-	10	5	18	12	10	8	23	7	21	2	15	15	8	22
	25%	18%	27%	-%	31%	26%	24%	25%	28%	42%	25%	24%	26%	17%	25%	24%	21%	27%
		22%	78%	-%	34%	17%	59%	41%	34%	26%	77%	23%	71%	5%	50%	50%	27%	73%
Calls between different sites	30	7	23	-	8	4	16	14	11	4	23	7	22	2	16	14	13	15
	25%	18%	27%	-%	23%	23%	22%	29%	32%	21%	25%	23%	26%	17%	26%	23%	33%	19%
		22%	78%	-%	25%	15%	54%	46%	38%	13%	78%	22%	73%	5%	53%	47%	43%	51%
Card payments	27	9	17	-	7	7	13	14	6	5	20	7	19	1	18	9	9	18
	22%	26%	20%	-%	22%	39%	18%	28%	18%	28%	22%	23%	23%	9%	30%	15%	24%	22%
		36%	64%	-%	27%	27%	49%	51%	24%	19%	76%	24%	73%	3%	67%	33%	34%	66%
Fax services	23	10	13	-	10	3	17	6	13	3	20	3	17	3	11	11	4	19
	19%	27%	15%	-%	29%	18%	23%	13%	36%	15%	22%	10%	21%	28%	19%	19%	11%	23%
		43%	57%	-%	43%	15%	73%	27%	56%	12%	88%	12%	76%	11%	50%	50%	18%	82%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 24

A3B. Please rank the functions for which your company uses ISDN30 in order of importance? RANKED FIRST, SECOND OR THIRD MOST IMPORTANT FUNCTION (MULTI CODE)

Base : Those who use ISN30 (and mostly use an ISDN service)

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	b	*c	d	*e	f	g	h	*i	j	k	l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	137	43	94	-	40	21	83	54	40	21	105	32	94	11	66	71	40	94
Effective Weighted Sample	133	42	91	-	40	21	80	53	39	21	103	30	92	11	64	70	38	93
Total	122	36	85	-	33	19	73	49	36	19	93	29	84	9	60	61	38	81
		30%	70%	-%	27%	15%	60%	40%	29%	15%	76%	24%	69%	8%	50%	50%	31%	66%
Video conferencing	6	2	4	-	1	2	4	2	1	-	6	-	4	2	3	3	1	5
	5%	4%	5%	-%	2%	10%	6%	3%	3%	-%	6%	-%	5%	17%	5%	4%	2%	6%
		27%	73%	-%	14%	32%	73%	27%	18%	-%	100%	-%	73%	27%	55%	45%	14%	86%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 24

A3B. Please rank the functions for which your company uses ISDN30 in order of importance? RANKED FIRST, SECOND OR THIRD MOST IMPORTANT FUNCTION (MULTI CODE)

Base : Those who use ISN30 (and mostly use an ISDN service)

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
	Total	NEVER			YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
		LAST YEAR	EVER	/DK															
Significance Level: 95%		*a	b	*c	d	*e	f	*g	h	i	j	*k	l	m	n	*o	p	q	*r
Unweighted total	137	26	83	28	95	29	59	17	102	32	64	12	34	47	31	25	36	48	13
Effective Weighted Sample	133	26	80	27	92	28	57	17	99	31	62	12	33	46	30	25	35	47	13
Total	122	22	74	25	83	26	51	16	91	28	56	11	30	42	27	23	31	43	12
		18%	61%	21%	68%	21%	42%	13%	74%	23%	46%	9%	25%	34%	22%	19%	26%	35%	10%
Incoming calls	60	15	32	14	40	14	23	9	45	15	27	4	17	22	16	13	16	21	8
	50%	67%	43%	54%	48%	52%	45%	54%	50%	54%	48%	40%	57%	52%	58%	56%	51%	49%	67%
		25%	53%	23%	66%	23%	38%	14%	75%	25%	45%	7%	28%	36%	26%	21%	26%	35%	13%
Outgoing calls	52	11	25	16	30	14	20	9	37	14	24	5	14	15	13	10	13	16	7
	43%	49%	34%	65%	36%	54%	40%	54%	41%	51%	42%	51%	46%	37%	49%	44%	42%	38%	60%
		21%	48%	31%	58%	27%	39%	17%	70%	28%	45%	10%	26%	29%	25%	20%	25%	31%	13%
Internet services	51	10	31	10	35	11	19	8	41	7	21	6	14	20	11	10	14	22	3
	42%	46%	42%	40%	42%	40%	37%	49%	46%	24%	38%	54%	48%	48%	39%	43%	46%	51%	22%
		20%	60%	20%	68%	21%	37%	16%	81%	13%	41%	11%	28%	39%	21%	19%	28%	42%	5%
Security/alarm systems	33	6	22	6	25	4	17	3	22	10	17	3	11	10	6	4	10	12	2
	27%	25%	29%	22%	30%	15%	33%	17%	24%	35%	29%	27%	35%	23%	22%	16%	31%	27%	16%
		17%	66%	17%	76%	12%	51%	8%	66%	30%	50%	9%	32%	29%	19%	11%	29%	35%	6%
Data services	30	3	20	7	20	8	8	4	23	6	11	1	9	17	9	7	11	14	4
	25%	15%	26%	28%	24%	30%	16%	22%	25%	22%	20%	7%	30%	41%	34%	31%	34%	33%	33%
		11%	65%	23%	68%	26%	28%	12%	76%	21%	37%	3%	30%	57%	30%	24%	36%	47%	13%
Calls between different sites	30	4	20	6	19	7	12	2	21	8	12	2	7	10	8	8	7	10	5
	25%	19%	27%	23%	23%	27%	24%	15%	24%	30%	22%	22%	23%	25%	28%	36%	22%	24%	40%
		14%	67%	19%	64%	24%	41%	8%	72%	28%	41%	8%	23%	34%	25%	28%	23%	35%	16%
Card payments	27	5	16	5	18	6	13	2	21	5	14	2	6	10	4	4	8	11	1
	22%	23%	22%	21%	22%	23%	26%	12%	23%	18%	24%	15%	20%	23%	16%	16%	25%	25%	9%
		19%	61%	20%	67%	23%	49%	7%	78%	19%	51%	6%	22%	36%	16%	14%	29%	40%	4%
Fax services	23	6	14	3	20	2	6	1	20	3	6	1	6	15	10	4	11	13	2
	19%	28%	19%	10%	24%	8%	12%	6%	22%	10%	11%	7%	18%	36%	36%	18%	37%	31%	20%
		28%	61%	11%	88%	9%	27%	5%	88%	12%	28%	3%	24%	65%	42%	19%	50%	59%	10%
Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																			

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 24

A3B. Please rank the functions for which your company uses ISDN30 in order of importance? RANKED FIRST, SECOND OR THIRD MOST IMPORTANT FUNCTION (MULTI CODE)

Base : Those who use ISN30 (and mostly use an ISDN service)

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
								UP TO							UP TO	OVER			
	LAST	EVER	NEVER	3	4+	YES	NO/DK	YEARS	YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	2	2	YES	NO/DK	
	YEAR		/DK	YES	NO	YES	NO/DK	YEARS	YEARS	YES	NO/DK	YEARS	YEARS	YEARS	YEARS	YEARS	YEARS	YES	NO/DK
Significance Level: 95%	Total	*a	b	*c	d	*e	f	*g	h	i	j	*k	l	m	n	*o	p	q	*r
Unweighted total	137	26	83	28	95	29	59	17	102	32	64	12	34	47	31	25	36	48	13
Effective Weighted Sample	133	26	80	27	92	28	57	17	99	31	62	12	33	46	30	25	35	47	13
Total	122	22	74	25	83	26	51	16	91	28	56	11	30	42	27	23	31	43	12
		18%	61%	21%	68%	21%	42%	13%	74%	23%	46%	9%	25%	34%	22%	19%	26%	35%	10%
Video conferencing	6	1	4	1	5	1	5	-	4	2	5	-	1	1	-	-	1	1	-
	5%	4%	6%	3%	6%	3%	9%	-%	5%	6%	8%	-%	3%	2%	-%	-%	3%	2%	-%
		14%	73%	14%	86%	14%	82%	-%	73%	27%	82%	-%	18%	18%	-%	-%	18%	18%	-%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 25**

## **A4. Does your company have a switch i.e. PBX or PABX? (SINGLE CODE)**

Base : Those who (mostly) use ISN2/2e or ISDN30

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN	IP SWITCHED	IP NOT SWITCHED	ANY IP
					£1M	£1M-£20M	£21M-£100M	OVER												
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q	r	s
Unweighted total	217	44	52	120	30	67	64	52	141	137	80	76	61	-	67	61	85	67	16	85
Effective Weighted Sample	165	35	51	112	21	53	58	46	98	133	49	74	60	-	55	60	73	58	14	73
Total	209	68	61	79	40	70	54	39	139	122	87	70	52	-	57	54	75	61	13	75
		33%	29%	38%	19%	34%	26%	19%	67%	58%	42%	33%	25%	-%	28%	26%	36%	29%	6%	36%
Yes	153	45	46	62	20	51	43	33	103	93	60	50	43	-	50	46	65	55	9	65
	73%	66%	75%	78%	51%	73%	80%	86%	74%	76%	69%	72%	82%	-%	87%	84%	87%	91%	70%	87%
							d	d							jk		hjk	hijk		hjk
		29%	30%	41%	13%	34%	28%	22%	67%	61%	39%	33%	28%	-%	33%	30%	42%	36%	6%	42%
No	37	15	9	12	15	9	7	5	23	21	16	14	7	-	5	6	7	4	2	7
	17%	22%	15%	15%	38%	13%	12%	12%	16%	17%	18%	20%	13%	-%	9%	11%	9%	7%	19%	9%
					efg							q								
		41%	26%	33%	42%	25%	18%	13%	62%	56%	44%	38%	18%	-%	14%	16%	19%	12%	7%	19%
Don't know	19	8	6	5	4	10	4	1	14	8	11	6	3	-	2	3	3	1	1	3
	9%	12%	10%	7%	11%	14%	8%	2%	10%	7%	13%	8%	5%	-%	4%	5%	4%	1%	11%	4%
						g			q		q									
		43%	30%	27%	22%	51%	23%	4%	72%	43%	57%	28%	15%	-%	11%	15%	17%	4%	7%	17%
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																				

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 25

## A4. Does your company have a switch i.e. PBX or PABX? (SINGLE CODE)

Base : Those who (mostly) use ISN2/2e or ISDN30

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	b	*c	d	e	f	g	h	i	j	k	l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	217	123	94	-	88	53	83	54	52	33	160	57	140	20	98	119	74	136
Effective Weighted Sample	165	83	91	-	60	37	80	53	44	29	127	39	115	14	78	87	51	123
Total	209	124	85	-	82	57	73	49	47	28	153	56	130	22	100	109	86	117
		59%	41%	-%	39%	27%	35%	23%	23%	13%	73%	27%	62%	11%	48%	52%	41%	56%
Yes	153	91	62	-	63	40	60	33	45	20	153	-	130	22	78	74	54	95
	73%	74%	72%	-%	76%	71%	82%	68%	95%	72%	100%	-%	100%	100%	78%	68%	63%	82%
		60%	40%	-%	41%	26%	39%	22%	29%	13%	100%	-%	85%	15%	51%	49%	36%	62%
No	37	19	17	-	11	11	9	12	*	6	-	37	-	-	21	16	19	16
	17%	16%	20%	-%	14%	20%	12%	24%	1%	23%	-%	65%	-%	-%	21%	15%	22%	14%
		53%	47%	-%	31%	30%	25%	32%	1%	18%	-%	100%	-%	-%	56%	44%	53%	44%
Don't know	19	13	7	-	8	5	5	4	2	1	-	19	-	-	1	18	13	5
	9%	10%	8%	-%	10%	10%	6%	8%	4%	4%	-%	35%	-%	-%	1%	17%	15%	4%
		66%	34%	-%	43%	28%	23%	20%	11%	6%	-%	100%	-%	-%	6%	94%	65%	27%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 25

## A4. Does your company have a switch i.e. PBX or PABX? (SINGLE CODE)

Base : Those who (mostly) use ISN2/2e or ISDN30

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	*k	l	m	n	o	p	q	*r
Unweighted total	217	34	128	55	138	55	99	33	156	51	110	22	44	59	45	34	50	62	23
Effective Weighted Sample	165	25	107	37	107	39	72	25	121	41	81	15	36	55	40	28	45	53	20
Total	209	33	119	57	131	53	95	39	151	45	111	22	40	50	38	33	42	55	20
		16%	57%	27%	63%	25%	45%	19%	72%	21%	53%	11%	19%	24%	18%	16%	20%	26%	9%
Yes	153	32	98	24	114	26	74	14	126	23	79	9	39	44	33	29	36	51	14
	73%	96%	82%	41%	87%	48%	78%	35%	83%	51%	71%	38%	98%	88%	87%	89%	85%	92%	70%
		c	c	e	g	i	52%	6%	26%	29%	22%	19%	23%	33%	9%				
		21%	64%	15%	74%	17%	49%	9%	82%	15%	52%	6%	26%	29%	22%	19%	23%	33%	9%
No	37	-	17	19	13	18	13	17	16	17	20	9	1	4	3	3	4	4	3
	17%	-	14%	34%	10%	35%	14%	43%	10%	37%	18%	41%	2%	8%	8%	8%	10%	8%	13%
		a	ab	d	f	h	56%	25%	2%	10%	8%	7%	12%	12%	7%				
		-	47%	53%	36%	50%	35%	46%	43%	45%	56%	25%	2%	10%	8%	7%	12%	12%	7%
Don't know	19	1	4	14	4	9	8	8	9	5	12	5	-	2	2	1	2	-	3
	9%	4%	3%	25%	3%	17%	8%	21%	6%	12%	10%	20%	-	5%	5%	3%	5%	-	17%
		ab	d	46%	40%	43%	48%	28%	60%	23%	-	11%	9%	5%	11%	-	17%		
Columns Tested:		a,b,c	- d,e	- f,g	- h,i	- j,k	- l,m,n	- o,p	- q,r										

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 26**

## **A5. Approximately, how often do you replace your switch(es)? (SINGLE CODE)**

Base : Those who (mostly) use ISN2/2e or ISDN30 and who have a switch (PBX or PABX)

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION												
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP SWITCHED	IP NOT SWITCHED	ANY IP	
					£1M	£1M-£20M	£21M-£100M	OVER £100M													
Significance Level: 95%		a	b	c	*d	e	f	g	h	i	j	k	l	*m	n	o	p	q	*r	s	
Unweighted total	160	30	39	91	15	51	49	42	105	105	55	55	50	-	57	51	72	61	10	72	
Effective Weighted Sample	127	24	38	86	12	39	45	39	77	103	36	54	49	-	46	50	61	52	9	61	
Total	153	45	46	62	20	51	43	33	103	93	60	50	43	-	50	46	65	55	9	65	
		29%	30%	41%	13%	34%	28%	22%	67%	61%	39%	33%	28%	-%	33%	30%	42%	36%	6%	42%	
Every 6 months	37	12	7	17	7	6	11	10	28	27	10	9	18	-	17	20	21	20	1	21	
	24%	27%	15%	28%	35%	12%	24%	29%	27%	29%	16%	17%	43%	-%	35%	43%	32%	36%	9%	32%	
		34%	19%	48%	19%	17%	29%	26%	76%	74%	26%	24%	50%	-%	48%	54%	56%	54%	2%	56%	
Yearly	55	12	18	25	6	21	14	14	34	34	21	21	14	-	15	14	22	16	5	22	
	36%	26%	39%	40%	30%	41%	31%	43%	34%	37%	35%	41%	32%	-%	30%	30%	34%	30%	59%	34%	
		22%	33%	46%	11%	38%	25%	26%	63%	62%	38%	37%	25%	-%	27%	25%	40%	30%	10%	40%	
Every 2 years	37	5	20	12	-	15	16	5	23	23	14	14	9	-	12	11	16	14	2	16	
	24%	11%	43%	20%	-%	30%	38%	15%	23%	25%	23%	28%	21%	-%	24%	23%	25%	25%	24%	25%	
		13%	53%	33%	-%	41%	44%	13%	63%	62%	38%	37%	25%	-%	33%	29%	43%	37%	6%	43%	
Longer than 2 years	16	10	1	5	7	2	2	4	10	8	8	6	2	-	5	1	5	5	-	5	
	10%	22%	2%	8%	35%	4%	5%	11%	9%	8%	13%	13%	4%	-%	11%	2%	8%	10%	-%	8%	
		61%	6%	32%	45%	12%	14%	24%	60%	49%	51%	40%	10%	-%	33%	5%	33%	33%	-%	33%	
Never replaced the switches before	7	6	-	1	-	6	-	1	6	1	6	1	-	-	-	1	1	-	1	1	
	5%	14%	-%	1%	-%	12%	-%	2%	6%	1%	10%	2%	-%	-%	-%	2%	1%	-%	9%	1%	
		bc	-%	11%	-%	f	-%	11%	89%	11%	ilnq	11%	-%	-%	-%	11%	11%	-%	11%	11%	
		89%	-%			89%					89%										
Don't know	1	-	-	1	-	1	*	-	1	-	1	-	-	-	*	-	*	-	-	*	
	1%	-%	-%	2%	-%	2%	1%	-%	1%	-%	2%	-%	-%	-%	1%	-%	1%	-%	-%	1%	
		-%	-%	100%	-%	67%	33%	-%	100%	-%	100%	-%	-%	-%	33%	-%	33%	-%	-%	33%	

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s



# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 26**

## **A5. Approximately, how often do you replace your switch(es)? (SINGLE CODE)**

Base : Those who (mostly) use ISN2/2e or ISDN30 and who have a switch (PBX or PABX)

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN30			ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		ISDN2	ISDN30	IP														
Significance Level: 95%		a	b	*c	d	e	f	g	h	*i	j	*k	l	*m	n	o	p	q
Unweighted total	160	92	68	-	67	38	67	38	49	23	160	-	140	20	75	85	48	109
Effective Weighted Sample	127	66	67	-	49	28	66	37	41	20	127	-	115	14	61	67	34	99
Total	153	91	62	-	63	40	60	33	45	20	153	-	130	22	78	74	54	95
		60%	40%	-%	41%	26%	39%	22%	29%	13%	100%	-%	85%	15%	51%	49%	36%	62%
Every 6 months	37	27	9	-	22	6	15	12	19	2	37	-	32	4	18	18	14	23
	24%	30%	15%	-%	36%	14%	26%	35%	42%	9%	24%	-%	25%	18%	23%	25%	25%	24%
		74%	26%	-%	61%	16%	42%	32%	51%	5%	100%	-%	89%	11%	50%	50%	37%	63%
Yearly	55	31	24	-	20	14	21	13	11	11	55	-	47	8	33	22	15	39
	36%	34%	39%	-%	33%	35%	36%	39%	24%	54%	36%	-%	36%	34%	42%	29%	27%	41%
		57%	43%	-%	37%	26%	39%	23%	20%	20%	100%	-%	86%	14%	61%	39%	27%	70%
Every 2 years	37	17	20	-	10	13	17	5	11	5	37	-	34	3	18	19	11	24
	24%	18%	33%	-%	16%	32%	29%	16%	24%	25%	24%	-%	26%	13%	23%	25%	21%	26%
		45%	55%	-%	28%	35%	47%	15%	30%	14%	100%	-%	92%	8%	49%	51%	30%	66%
Longer than 2 years	16	9	7	-	6	4	5	3	4	1	16	-	15	1	8	8	7	9
	10%	10%	12%	-%	9%	10%	8%	10%	9%	7%	10%	-%	11%	6%	10%	10%	14%	9%
		56%	44%	-%	36%	25%	28%	21%	25%	9%	100%	-%	91%	9%	51%	49%	46%	54%
Never replaced the switches before	7	6	1	-	3	3	1	-	-	1	7	-	1	6	-	7	6	1
	5%	7%	1%	-%	5%	8%	1%	-%	-%	4%	5%	-%	1%	28%	-%	9%	11%	1%
		89%	11%	-%	44%	44%	11%	-%	-%	11%	100%	-%	11%	89%	-%	100%	89%	11%
Don't know	1	1	-	-	1	*	-	-	*	-	1	-	1	-	*	1	1	-
	1%	1%	-%	-%	1%	1%	-%	-%	1%	-%	1%	-%	1%	-%	1%	1%	2%	-%
		100%	-%	-%	67%	33%	-%	-%	33%	-%	100%	-%	100%	-%	33%	67%	100%	-%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 26**

## **A5. Approximately, how often do you replace your switch(es)? (SINGLE CODE)**

Base : Those who (mostly) use ISN2/2e or ISDN30 and who have a switch (PBX or PABX)

	SWITCHING ISDN SUPPLIER				CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK	
Significance Level: 95%		a	b	*c	d	*e	f	*g	h	*i	j	*k	l	m	n	o	p	q	*r	
Unweighted total	160	33	102	25	120	27	76	12	126	29	80	8	43	51	39	30	41	56	16	
Effective Weighted Sample	127	24	85	18	95	20	59	9	99	26	63	5	35	47	35	24	37	48	14	
Total	153	32	98	24	114	26	74	14	126	23	79	9	39	44	33	29	36	51	14	
		21%	64%	15%	74%	17%	49%	9%	82%	15%	52%	6%	26%	29%	22%	19%	23%	33%	9%	
Every 6 months	37	21	15	1	34	2	13	3	28	8	16	-	13	14	14	10	11	19	2	
	24%	67%	15%	3%	30%	9%	18%	18%	22%	37%	20%	-%	35%	32%	41%	35%	30%	36%	14%	
		b	58%	40%	2%	92%	6%	37%	7%	77%	23%	44%	-%	37%	38%	37%	27%	29%	51%	5%
Yearly	55	5	41	8	40	10	29	4	48	6	31	3	14	17	9	8	13	16	5	
	36%	17%	42%	36%	35%	38%	39%	31%	38%	26%	39%	31%	35%	39%	28%	29%	37%	32%	39%	
		a	10%	75%	15%	72%	18%	53%	8%	87%	11%	56%	5%	25%	31%	17%	15%	24%	30%	10%
Every 2 years	37	*	28	8	23	8	17	4	31	4	21	-	8	11	8	7	9	10	6	
	24%	1%	29%	36%	20%	30%	23%	28%	25%	18%	26%	-%	20%	25%	24%	25%	25%	20%	44%	
		a	1%	76%	23%	62%	21%	46%	10%	85%	11%	57%	-%	21%	30%	21%	20%	24%	27%	16%
Longer than 2 years	16	5	10	1	13	3	11	-	12	4	8	2	4	1	2	3	2	5	-	
	10%	15%	11%	3%	11%	12%	14%	-%	9%	18%	10%	28%	10%	2%	7%	11%	6%	10%	-%	
		29%	66%	5%	81%	19%	67%	-%	74%	26%	52%	15%	25%	5%	14%	20%	14%	33%	-%	
Never replaced the switches before	7	-	3	4	3	3	3	3	6	-	3	3	-	1	-	-	1	1	-	
	5%	-%	3%	17%	3%	12%	4%	23%	5%	-%	4%	37%	-%	2%	-%	-%	2%	2%	-%	
		-%	44%	56%	44%	44%	44%	44%	89%	-%	44%	44%	-%	11%	-%	-%	11%	11%	-%	
Don't know	1	-	-	1	1	-	1	-	*	-	*	*	-	-	-	-	-	-	*	
	1%	-%	-%	5%	1%	-%	1%	-%	*%	-%	1%	5%	-%	-%	-%	-%	-%	-%	3%	
		-%	-%	100%	100%	-%	67%	-%	33%	-%	33%	33%	-%	-%	-%	-%	-%	-%	33%	

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 27**

**A6. Are you planning to replace your switch(es) in the next twelve months? (SINGLE CODE)**

Base : Those who (mostly) use ISN2/2e or ISDN30 and who have a switch (PBX or PABX)

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN	IP SWITCHED	IP NOT SWITCHED	ANY IP
					£1M	£1M-£20M	£21M-£100M	OVER £100M												
Significance Level: 95%		a	b	c	*d	e	f	g	h	i	j	k	l	*m	n	o	p	q	*r	s
Unweighted total	160	30	39	91	15	51	49	42	105	105	55	55	50	-	57	51	72	61	10	72
Effective Weighted Sample	127	24	38	86	12	39	45	39	77	103	36	54	49	-	46	50	61	52	9	61
Total	153	45	46	62	20	51	43	33	103	93	60	50	43	-	50	46	65	55	9	65
		29%	30%	41%	13%	34%	28%	22%	67%	61%	39%	33%	28%	-%	33%	30%	42%	36%	6%	42%
Yes	127	31	41	55	15	40	42	26	85	82	45	42	40	-	41	42	55	48	7	55
	83%	69%	89%	89%	75%	77%	98%	78%	83%	88%	76%	83%	93%	-%	83%	92%	85%	87%	76%	85%
			a				eg					j		-%	33%	j				
		25%	32%	43%	12%	31%	33%	20%	67%	64%	36%	33%	31%	-%	33%	33%	44%	38%	6%	44%
No	14	7	2	5	1	9	1	3	9	8	6	5	3	-	4	3	4	4	-	4
	9%	15%	5%	8%	5%	17%	2%	9%	9%	8%	10%	10%	7%	-%	8%	6%	6%	8%	-%	6%
						f														
		50%	15%	35%	7%	65%	6%	22%	64%	57%	43%	36%	21%	-%	31%	21%	31%	31%	-%	31%
Don't know	12	7	3	2	4	3	-	4	9	3	9	3	-	-	5	1	5	3	2	5
	8%	15%	6%	4%	20%	5%	-%	13%	8%	4%	15%	7%	-%	-%	9%	2%	8%	6%	24%	8%
		c						f	l		ilo				l	l	l			l
		57%	23%	20%	34%	23%	-%	36%	72%	28%	72%	28%	-%	-%	37%	7%	44%	26%	18%	44%
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																				

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 27

A6. Are you planning to replace your switch(es) in the next twelve months? (SINGLE CODE)

Base : Those who (mostly) use ISN2/2e or ISDN30 and who have a switch (PBX or PABX)

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	b	*c	d	e	f	g	h	*i	j	*k	l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	160	92	68	-	67	38	67	38	49	23	160	-	140	20	75	85	48	109
Effective Weighted Sample	127	66	67	-	49	28	66	37	41	20	127	-	115	14	61	67	34	99
Total	153	91	62	-	63	40	60	33	45	20	153	-	130	22	78	74	54	95
		60%	40%	-%	41%	26%	39%	22%	29%	13%	100%	-%	85%	15%	51%	49%	36%	62%
Yes	127	75	52	-	53	32	54	28	40	16	127	-	115	12	70	57	42	83
	83%	82%	85%	-%	85%	79%	91%	83%	88%	79%	83%	-%	88%	55%	89%	77%	77%	87%
		59%	41%	-%	42%	25%	43%	22%	31%	12%	100%	-%	90%	10%	55%	45%	33%	66%
No	14	8	6	-	8	1	3	5	1	3	14	-	7	6	5	8	8	6
	9%	8%	10%	-%	12%	2%	5%	14%	2%	17%	9%	-%	6%	28%	7%	11%	14%	6%
		56%	44%	-%	56%	7%	23%	34%	6%	25%	100%	-%	54%	46%	40%	60%	57%	43%
Don't know	12	9	3	-	1	7	2	1	5	1	12	-	8	4	3	9	5	6
	8%	10%	5%	-%	2%	18%	4%	3%	10%	4%	8%	-%	6%	17%	4%	12%	8%	6%
		72%	28%	-%	12%	61%	20%	8%	37%	7%	100%	-%	69%	31%	26%	74%	37%	51%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 27

## A6. Are you planning to replace your switch(es) in the next twelve months? (SINGLE CODE)

Base : Those who (mostly) use ISN2/2e or ISDN30 and who have a switch (PBX or PABX)

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
								UP TO 3 YEARS	4+ YEARS						UP TO 2 YEARS	OVER 2 YEARS			
	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK			SIP TRUNKING	HOSTED VOIP	IP CENTREX							
													YES	NO/DK			YES	NO/DK	YES
Significance Level: 95%	Total	a	b	*c	d	*e	f	*g	h	*i	j	*k	l	m	n	o	p	q	*r
Unweighted total	160	33	102	25	120	27	76	12	126	29	80	8	43	51	39	30	41	56	16
Effective Weighted Sample	127	24	85	18	95	20	59	9	99	26	63	5	35	47	35	24	37	48	14
Total	153	32	98	24	114	26	74	14	126	23	79	9	39	44	33	29	36	51	14
		21%	64%	15%	74%	17%	49%	9%	82%	15%	52%	6%	26%	29%	22%	19%	23%	33%	9%
Yes	127	31	82	14	104	14	65	7	110	16	69	2	35	40	30	24	31	44	11
	83%	98%	84%	59%	92%	56%	87%	51%	87%	72%	87%	28%	90%	93%	90%	82%	88%	86%	83%
		24%	65%	11%	82%	11%	51%	6%	87%	13%	54%	2%	28%	32%	23%	19%	25%	35%	9%
No	14	1	8	5	6	7	6	4	11	2	6	3	1	1	3	2	2	3	1
	9%	2%	8%	23%	6%	29%	8%	29%	9%	10%	8%	37%	2%	2%	10%	7%	6%	6%	7%
		6%	56%	39%	46%	54%	41%	29%	83%	17%	47%	23%	6%	7%	23%	15%	16%	23%	8%
Don't know	12	-	8	4	3	4	4	3	5	4	4	3	3	2	-	3	2	4	1
	8%	-	8%	19%	3%	15%	5%	20%	4%	18%	5%	35%	8%	5%	-	11%	6%	8%	10%
		-	64%	36%	26%	33%	33%	23%	37%	33%	31%	25%	26%	18%	-	26%	18%	32%	12%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 28**

**A7. Is your switch IP-enabled? (i.e. can it be connected to IP based telephone services instead of ISDN2/2e/ ISDN30)? (SINGLE CODE)**

Base : Those who (mostly) use ISN2/2e or ISDN30 and who have a switch (PBX or PABX)

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION													ANY IP
	Total	UNDER			ISDN2	ISDN30		ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP SWITCHED	IP NOT SWITCHED						
		1-49	50-249	250+		£1M- £20M	£21M-£100M								ISDN	ISDN						
Significance Level: 95%		a	b	c	*d	e	f	g	h	i	j	k	l	*m	n	o	p	q	*r	s		
Unweighted total	160	30	39	91	15	51	49	42	105	105	55	55	50	-	57	51	72	61	10	72		
Effective Weighted Sample	127	24	38	86	12	39	45	39	77	103	36	54	49	-	46	50	61	52	9	61		
Total	153	45	46	62	20	51	43	33	103	93	60	50	43	-	50	46	65	55	9	65		
		29%	30%	41%	13%	34%	28%	22%	67%	61%	39%	33%	28%	-%	33%	30%	42%	36%	6%	42%		
Yes	130	32	44	54	18	37	40	30	88	84	47	42	41	-	49	45	64	54	9	64		
	85%	72%	97%	87%	88%	73%	94%	91%	86%	90%	78%	85%	96%	-%	98%	98%	99%	99%	100%	99%		
		a	a	a	e	e	e	e	j	j	j	j	j	hjk	hjk	hjk	hjk	hijk	hijk	hijk		
		25%	34%	41%	14%	29%	31%	23%	67%	64%	36%	33%	32%	-%	38%	34%	49%	42%	7%	49%		
No	17	8	1	7	2	10	3	2	10	8	8	7	2	-	1	1	1	1	-	1		
	11%	18%	3%	12%	12%	19%	6%	5%	9%	9%	14%	14%	4%	-%	2%	2%	1%	1%	-%	1%		
					ps	ps	nopqs	nopqs	ps	ps	nopqs	nopqs	ps	ps	ps	ps	ps	ps	ps	ps		
		48%	8%	43%	14%	59%	17%	10%	59%	51%	49%	41%	10%	-%	5%	5%	5%	5%	-%	5%		
Don't know	6	5	-	1	-	4	-	1	5	1	5	1	-	-	-	-	-	-	-	-		
	4%	10%	-%	2%	-%	8%	-%	4%	5%	1%	8%	2%	-%	-%	-%	-%	-%	-%	-%	-%		
											ips											
		79%	-%	21%	-%	76%	-%	24%	86%	14%	86%	14%	-%	-%	-%	-%	-%	-%	-%	-%		
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																						

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 28

A7. Is your switch IP-enabled? (i.e. can it be connected to IP based telephone services instead of ISDN2/2e/ ISDN30)? (SINGLE CODE)

Base : Those who (mostly) use ISN2/2e or ISDN30 and who have a switch (PBX or PABX)

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
Significance Level: 95%		a	b	*c	d	e	f	g	h	*i	j	*k	l	*m	n	o	p	q
Unweighted total	160	92	68	-	67	38	67	38	49	23	160	-	140	20	75	85	48	109
Effective Weighted Sample	127	66	67	-	49	28	66	37	41	20	127	-	115	14	61	67	34	99
Total	153	91	62	-	63	40	60	33	45	20	153	-	130	22	78	74	54	95
		60%	40%	-%	41%	26%	39%	22%	29%	13%	100%	-%	85%	15%	51%	49%	36%	62%
Yes	130	77	54	-	57	31	55	29	44	20	130	-	130	-	70	60	43	86
	85%	84%	88%	-%	91%	77%	92%	87%	98%	100%	85%	-%	100%	-%	89%	81%	79%	91%
		59%	41%	-%	44%	24%	42%	22%	eg 34%	15%	100%	-%	100%	-%	54%	46%	33%	66%
No	17	10	7	-	2	8	5	4	1	-	17	-	-	17	8	8	8	7
	11%	11%	11%	-%	3%	19%	8%	11%	2%	-%	11%	-%	-%	74%	11%	11%	15%	7%
		59%	41%	-%	12%	dh 47%	29%	22%	5%	-%	100%	-%	-%	100%	50%	50%	51%	41%
Don't know	6	5	1	-	4	1	-	1	-	-	6	-	-	6	-	6	3	2
	4%	5%	1%	-%	6%	3%	-%	2%	-%	-%	4%	-%	-%	26%	-%	8%	6%	2%
		86%	14%	-%	62%	24%	-%	14%	-%	-%	100%	-%	-%	100%	-%	100%	54%	38%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 28

A7. Is your switch IP-enabled? (i.e. can it be connected to IP based telephone services instead of ISDN2/2e/ ISDN30)? (SINGLE CODE)

Base : Those who (mostly) use ISN2/2e or ISDN30 and who have a switch (PBX or PABX)

	SWITCHING ISDN SUPPLIER				CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%		a	b	*c	d	*e	f	*g	h	*i	j	*k	l	m	n	o	p	q	*r
Unweighted total	160	33	102	25	120	27	76	12	126	29	80	8	43	51	39	30	41	56	16
Effective Weighted Sample	127	24	85	18	95	20	59	9	99	26	63	5	35	47	35	24	37	48	14
Total	153	32	98	24	114	26	74	14	126	23	79	9	39	44	33	29	36	51	14
		21%	64%	15%	74%	17%	49%	9%	82%	15%	52%	6%	26%	29%	22%	19%	23%	33%	9%
Yes	130	30	80	20	102	18	63	4	109	18	63	3	39	43	32	29	35	51	13
	85%	96%	82%	83%	89%	71%	85%	27%	87%	80%	80%	38%	100%	98%	98%	100%	98%	100%	94%
		23%	62%	15%	78%	14%	48%	3%	84%	14%	48%	2%	30%	33%	25%	22%	27%	39%	10%
No	17	1	15	1	11	4	10	6	12	4	15	1	-	1	1	-	1	-	1
	11%	2%	15%	3%	9%	17%	14%	40%	10%	20%	19%	9%	-%	2%	2%	-%	2%	-%	6%
		5%	90%	5%	65%	26%	62%	33%	73%	27%	90%	5%	-%	5%	5%	-%	5%	-%	5%
Don't know	6	*	2	3	1	3	1	5	4	-	1	5	-	-	-	-	-	-	-
	4%	1%	2%	13%	1%	12%	2%	33%	3%	-%	2%	53%	-%	-%	-%	-%	-%	-%	-%
		7%	38%	54%	21%	54%	21%	79%	76%	-%	21%	79%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r



# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 29**

## **A9. Which supplier(s) do you use for (ISDN2/2e/ ISDN30) services? (MULTI CODE)**

Base : Those who (mostly) use ISN2/2e or ISDN30

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION												IP SWITCHED	IP NOT SWITCHED	ANY IP
	Total	1-49 a	50-249 b	250+ c	UNDER				ISDN2 h	ISDN30 i	ISDN2 ONLY j	ISDN30 ONLY k	BOTH ISDN l	IP NOT ISDN *m	ISDN2 & IP n	ISDN30 & IP o	ISDN & IP p	ISDN q	ISDN *r				
					£1M d	£1M- £20M e	£21M-£100M f	OVER £100M g															
Significance Level: 95%																							
Unweighted total	217	44	52	120	30	67	64	52	141	137	80	76	61	-	67	61	85	67	16	85			
Effective Weighted Sample	165	35	51	112	21	53	58	46	98	133	49	74	60	-	55	60	73	58	14	73			
Total	209	68	61	79	40	70	54	39	139	122	87	70	52	-	57	54	75	61	13	75			
		33%	29%	38%	19%	34%	26%	19%	67%	58%	42%	33%	25%	-%	28%	26%	36%	29%	6%	36%			
BT	136	47	37	52	27	38	38	29	90	78	58	46	31	-	37	41	51	44	7	51			
	65%	69%	61%	65%	66%	54%	69%	75%	64%	64%	67%	67%	60%	-%	65%	75%	68%	72%	51%	68%			
								e															
		35%	27%	38%	19%	28%	28%	22%	66%	57%	43%	34%	23%	-%	27%	30%	37%	32%	5%	37%			
Virgin Media (incl. NTL:Telewest)	68	19	21	29	11	17	24	15	49	48	20	19	29	-	35	32	43	38	5	43			
	33%	27%	34%	36%	26%	25%	45%	39%	35%	39%	23%	27%	56%	-%	61%	58%	58%	63%	38%	58%			
							e			j			hijk		hijk	hijk	hijk	hijk		hijk			
		27%	30%	42%	15%	25%	35%	22%	72%	70%	30%	28%	42%	-%	51%	47%	63%	56%	7%	63%			
AT&T	47	9	15	23	7	8	18	13	39	34	13	8	26	-	28	25	32	31	1	32			
	23%	13%	24%	29%	19%	11%	33%	34%	28%	28%	15%	12%	51%	-%	49%	45%	43%	52%	6%	43%			
							e	e	k	k			hijk		hijk	hijk	hijk	hijk		hijk			
		19%	31%	49%	16%	17%	39%	28%	83%	73%	27%	17%	56%	-%	60%	52%	68%	67%	2%	68%			
Colt Communications	46	14	12	21	11	16	8	10	34	32	14	13	20	-	20	17	24	22	2	24			
	22%	20%	19%	26%	28%	23%	16%	25%	24%	27%	16%	18%	38%	-%	34%	32%	32%	36%	17%	32%			
													jk		jk			jk					
		29%	25%	45%	24%	35%	18%	21%	73%	70%	30%	27%	42%	-%	43%	38%	51%	46%	5%	51%			
Daisy Communications	45	12	15	19	7	8	15	11	28	36	9	17	19	-	22	28	31	29	2	31			
	22%	17%	24%	24%	18%	11%	28%	29%	20%	30%	10%	25%	37%	-%	38%	52%	41%	48%	14%	41%			
							e	e		j			hj		hj	hijk	hjk	hijk		hjk			
		26%	33%	41%	16%	17%	34%	25%	62%	80%	20%	38%	42%	-%	48%	63%	69%	65%	4%	69%			
Opal Communications	44	14	15	15	8	10	13	9	32	28	16	12	16	-	19	17	23	22	1	23			
	21%	20%	25%	18%	20%	15%	25%	22%	23%	23%	18%	17%	31%	-%	33%	31%	31%	37%	6%	31%			
													k		k			jk					
		32%	35%	34%	19%	24%	31%	20%	73%	64%	36%	27%	37%	-%	43%	39%	52%	51%	2%	52%			
KCOM (incl. Kingston Communications & Affiniti)	39	6	15	18	7	12	13	8	27	29	10	12	17	-	18	16	20	19	1	20			
	19%	9%	24%	23%	16%	17%	24%	21%	19%	24%	12%	18%	32%	-%	32%	30%	27%	32%	6%	27%			
													j		j	j	j	j		j			
		17%	37%	46%	17%	30%	33%	21%	68%	74%	26%	32%	43%	-%	46%	42%	51%	49%	2%	51%			
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																							

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 29**

## **A9. Which supplier(s) do you use for (ISDN2/2e/ ISDN30) services? (MULTI CODE)**

Base : Those who (mostly) use ISN2/2e or ISDN30

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION												IP SWITCHED		IP NOT SWITCHED		ANY IP
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	ISDN	ISDN						
					£1M	£1M-£20M	£21M-£100M	OVER £100M																	
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	*m	n	o	p	q	*r	s					
Unweighted total	217	44	52	120	30	67	64	52	141	137	80	76	61	-	67	61	85	67	16	85					
Effective Weighted Sample	165	35	51	112	21	53	58	46	98	133	49	74	60	-	55	60	73	58	14	73					
Total	209	68	61	79	40	70	54	39	139	122	87	70	52	-	57	54	75	61	13	75					
		33%	29%	38%	19%	34%	26%	19%	67%	58%	42%	33%	25%	-%	28%	26%	36%	29%	6%	36%					
Vodafone (inc. Cable & Wireless)	33	5	15	14	5	4	17	7	24	28	5	9	19	-	19	22	26	21	4	26					
	16%	7%	24%	18%	13%	5%	32%	18%	17%	23%	6%	13%	37%	-%	34%	40%	34%	35%	32%	34%					
		a	a				e	e	j	j		hjk	hjk		hjk	hijk	hjk	hjk		hjk					
		14%	45%	42%	16%	11%	52%	22%	72%	85%	15%	28%	58%	-%	58%	66%	77%	64%	13%	77%					
TalkTalk	33	7	17	9	5	6	15	6	24	24	8	9	15	-	15	15	19	17	2	19					
	16%	10%	28%	11%	13%	8%	28%	16%	17%	20%	10%	13%	30%	-%	26%	28%	26%	28%	17%	26%					
		ac					e					jk	jk		j	jk	jk	jk		jk					
		20%	53%	27%	16%	18%	47%	19%	73%	74%	26%	27%	47%	-%	47%	47%	60%	53%	7%	60%					
Unicom	31	6	9	16	3	7	10	11	23	25	6	8	17	-	16	16	18	18	1	18					
	15%	8%	15%	21%	8%	9%	18%	28%	17%	20%	7%	11%	32%	-%	28%	29%	24%	29%	6%	24%					
							e			j		hjk	hjk		jk	jk	jk	jk		jk					
		18%	29%	53%	10%	21%	32%	35%	75%	80%	20%	25%	55%	-%	53%	51%	59%	57%	3%	59%					
Global Crossing	28	4	11	12	4	8	9	7	17	23	5	11	12	-	13	15	18	16	2	18					
	13%	6%	19%	15%	10%	11%	17%	18%	12%	19%	5%	16%	23%	-%	23%	28%	24%	27%	14%	24%					
									j			j	j		j	hj	hj	hj		hj					
		15%	41%	44%	14%	28%	32%	25%	60%	84%	16%	40%	43%	-%	47%	56%	66%	59%	7%	66%					
MCI	26	6	6	14	5	5	9	7	19	21	5	8	13	-	11	13	14	13	1	14					
	13%	9%	10%	17%	13%	7%	17%	17%	13%	17%	6%	11%	25%	-%	19%	24%	19%	22%	6%	19%					
												jk	jk		j	jk	j	j		j					
		24%	24%	53%	19%	18%	34%	26%	71%	79%	21%	29%	50%	-%	41%	50%	53%	50%	3%	53%					
XLN	26	4	7	15	3	8	6	9	15	24	3	11	12	-	9	15	15	13	2	15					
	13%	6%	11%	19%	8%	11%	12%	22%	11%	19%	3%	16%	23%	-%	16%	28%	20%	22%	14%	20%					
									j			j	hj		j	hj	j	hj		j					
		16%	25%	59%	12%	30%	25%	33%	56%	90%	10%	44%	46%	-%	34%	58%	58%	51%	7%	58%					
Spitfire	24	4	6	14	2	10	4	6	13	21	3	10	11	-	9	11	13	12	1	13					
	11%	6%	9%	17%	5%	14%	7%	16%	10%	17%	3%	15%	21%	-%	15%	19%	17%	20%	6%	17%					
									j			j	hj		j	j	j	j		j					
Columns Tested:		a,b,c	- d,e,f,g	- h,i,j,k,l,m,n,o,p,q,r,s																					

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 29**

## **A9. Which supplier(s) do you use for (ISDN2/2e/ ISDN30) services? (MULTI CODE)**

Base : Those who (mostly) use ISN2/2e or ISDN30

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN SWITCHED	IP NOT SWITCHED	ANY IP	
					£1M	£1M-£20M	£21M-£100M	OVER £100M												
Significance Level: 95%	a	b	c	d	e	f	g	h	i	j	k	l	*m	n	o	p	q	*r	s	
Unweighted total	217	44	52	120	30	67	64	52	141	137	80	76	61	-	67	61	85	67	16	85
Effective Weighted Sample	165	35	51	112	21	53	58	46	98	133	49	74	60	-	55	60	73	58	14	73
Total	209	68	61	79	40	70	54	39	139	122	87	70	52	-	57	54	75	61	13	75
		33%	29%	38%	19%	34%	26%	19%	67%	58%	42%	33%	25%	-%	28%	26%	36%	29%	6%	36%
Other	3	3	-	-	-	3	-	-	3	-	3	-	-	-	-	-	-	-	-	-
	1%	5%	-%	-%	-%	4%	-%	-%	2%	-%	4%	-%	-%	-%	-%	-%	-%	-%	-%	-%
		c																		
		100%	-%	-%	-%	100%	-%	-%	100%	-%	100%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Don't Know	1	-	1	-	-	1	-	-	1	1	-	-	1	-	1	1	1	-	-	1
	*%	-%	2%	-%	-%	1%	-%	-%	1%	1%	-%	-%	2%	-%	2%	2%	1%	-%	-%	1%
		-%	100%	-%	-%	100%	-%	-%	100%	100%	-%	-%	100%	-%	100%	100%	100%	-%	-%	100%

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 29**

## **A9. Which supplier(s) do you use for (ISDN2/2e/ ISDN30) services? (MULTI CODE)**

Base : Those who (mostly) use ISN2/2e or ISDN30

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	b	*c	d	e	f	g	h	i	j	k	l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	217	123	94	-	88	53	83	54	52	33	160	57	140	20	98	119	74	136
Effective Weighted Sample	165	83	91	-	60	37	80	53	44	29	127	39	115	14	78	87	51	123
Total	209	124	85	-	82	57	73	49	47	28	153	56	130	22	100	109	86	117
		59%	41%	-%	39%	27%	35%	23%	23%	13%	73%	27%	62%	11%	48%	52%	41%	56%
BT	136	82	54	-	64	26	50	28	34	17	98	38	86	12	59	77	58	76
	65%	67%	63%	-%	78%	45%	68%	57%	71%	62%	64%	68%	66%	54%	59%	71%	67%	65%
		61%	39%	-%	eg 47%	19%	e 37%	20%	e 25%	13%	72%	28%	63%	9%	43%	57%	42%	56%
Virgin Media (incl. NTL:Telewest)	68	41	27	-	29	20	31	17	35	8	61	7	58	4	40	28	21	45
	33%	33%	32%	-%	35%	36%	43%	35%	74%	30%	40%	12%	44%	17%	40%	26%	25%	39%
		60%	40%	-%	43%	30%	46%	25%	defgi 51%	12%	90%	10%	84%	6%	58%	42%	31%	67%
AT&T	47	29	18	-	19	20	23	12	23	9	43	5	40	2	23	24	7	39
	23%	24%	21%	-%	23%	35%	31%	24%	49%	33%	28%	8%	31%	10%	23%	22%	8%	33%
		62%	38%	-%	41%	42%	48%	25%	dg 49%	19%	90%	10%	86%	5%	49%	51%	15%	p 82%
Colt Communications	46	32	14	-	15	18	18	14	18	6	41	6	37	3	20	27	16	29
	22%	26%	17%	-%	19%	32%	25%	29%	38%	21%	27%	10%	29%	15%	20%	25%	18%	25%
		69%	31%	-%	33%	40%	39%	30%	39%	13%	88%	12%	81%	7%	43%	57%	34%	63%
Daisy Communications	45	21	24	-	22	6	22	14	21	10	40	5	40	1	21	24	14	31
	22%	17%	28%	-%	26%	11%	30%	29%	44%	36%	26%	8%	30%	4%	21%	22%	16%	27%
		48%	52%	-%	48%	14%	49%	32%	e 47%	22%	90%	10%	88%	2%	46%	54%	31%	69%
Opal Communications	44	28	16	-	16	16	16	12	17	6	39	4	37	2	21	23	16	26
	21%	22%	19%	-%	20%	28%	22%	25%	35%	23%	26%	8%	28%	10%	21%	21%	19%	22%
		63%	37%	-%	38%	36%	36%	27%	38%	15%	90%	10%	85%	5%	47%	53%	37%	60%
KCOM (incl. Kingston Communications & Affiniti)	39	24	16	-	16	11	14	16	14	6	33	6	30	3	21	18	14	25
	19%	19%	18%	-%	20%	19%	19%	32%	30%	20%	22%	11%	23%	16%	21%	17%	16%	22%
		60%	40%	-%	41%	27%	35%	40%	37%	14%	85%	15%	76%	9%	53%	47%	35%	65%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 29

## A9. Which supplier(s) do you use for (ISDN2/2e/ ISDN30) services? (MULTI CODE)

Base : Those who (mostly) use ISN2/2e or ISDN30

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN30			ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		ISDN2	ISDN30	IP														
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j	k	l	*m	n	o	p	q
Unweighted total	217	123	94	-	88	53	83	54	52	33	160	57	140	20	98	119	74	136
Effective Weighted Sample	165	83	91	-	60	37	80	53	44	29	127	39	115	14	78	87	51	123
Total	209	124	85	-	82	57	73	49	47	28	153	56	130	22	100	109	86	117
		59%	41%	-%	39%	27%	35%	23%	23%	13%	73%	27%	62%	11%	48%	52%	41%	56%
Vodafone (inc. Cable & Wireless)	33	15	18	-	17	7	20	9	18	7	30	3	29	1	14	20	8	25
	16%	12%	21%	-%	20%	13%	27%	18%	38%	27%	20%	6%	22%	6%	14%	18%	9%	22%
		46%	54%	-%	51%	22%	59%	26%	deg 55%	22%	91%	9%	86%	4%	41%	59%	23%	p 77%
TalkTalk	33	19	14	-	14	10	16	8	17	3	33	-	30	2	17	15	5	28
	16%	15%	16%	-%	17%	18%	22%	17%	35%	10%	21%	-%	23%	11%	17%	14%	5%	24%
		58%	42%	-%	42%	30%	49%	25%	dgi 51%	9%	100%	-%	93%	7%	53%	47%	14%	p 86%
Unicom	31	20	11	-	13	10	12	13	12	6	28	3	26	3	15	16	5	26
	15%	16%	13%	-%	16%	17%	16%	26%	26%	21%	19%	5%	20%	11%	15%	15%	5%	22%
		64%	36%	-%	43%	32%	39%	41%	40%	19%	k 92%	8%	83%	8%	49%	51%	15%	p 85%
Global Crossing	28	13	15	-	11	5	13	10	14	5	26	2	24	1	13	15	6	22
	13%	11%	17%	-%	14%	10%	18%	22%	29%	17%	17%	4%	19%	6%	13%	14%	7%	19%
		48%	52%	-%	40%	20%	46%	38%	e 49%	17%	92%	8%	87%	5%	45%	55%	21%	p 79%
MCI	26	17	9	-	10	9	11	10	11	3	24	2	23	1	11	15	7	19
	13%	14%	11%	-%	12%	15%	15%	20%	23%	11%	16%	4%	18%	4%	11%	14%	9%	16%
		65%	35%	-%	38%	33%	43%	37%	42%	11%	92%	8%	88%	4%	43%	57%	28%	72%
XLN	26	12	15	-	8	7	14	9	12	3	24	2	23	1	12	15	8	18
	13%	9%	17%	-%	10%	11%	19%	20%	d 26%	10%	16%	4%	17%	5%	12%	13%	9%	16%
		44%	56%	-%	32%	25%	54%	36%	47%	11%	91%	9%	87%	5%	44%	56%	30%	70%
Spitfire	24	11	13	-	7	7	11	10	8	4	22	2	20	2	11	12	7	16
	11%	9%	15%	-%	8%	12%	15%	20%	18%	16%	14%	4%	15%	9%	11%	11%	9%	14%
		47%	53%	-%	28%	29%	47%	41%	36%	18%	91%	9%	83%	8%	48%	52%	31%	69%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 29

## A9. Which supplier(s) do you use for (ISDN2/2e/ ISDN30) services? (MULTI CODE)

Base : Those who (mostly) use ISN2/2e or ISDN30

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	b	*c	d	e	f	g	h	i	j	k	l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	217	123	94	-	88	53	83	54	52	33	160	57	140	20	98	119	74	136
Effective Weighted Sample	165	83	91	-	60	37	80	53	44	29	127	39	115	14	78	87	51	123
Total	209	124	85	-	82	57	73	49	47	28	153	56	130	22	100	109	86	117
		59%	41%	-%	39%	27%	35%	23%	23%	13%	73%	27%	62%	11%	48%	52%	41%	56%
Other	3	3	-	-	-	3	-	-	-	-	3	-	-	3	-	3	3	-
	1%	3%	-%	-%	-%	6%	-%	-%	-%	-%	2%	-%	-%	14%	-%	3%	4%	-%
		100%	-%	-%	-%	100%	-%	-%	-%	-%	100%	-%	-%	100%	-%	100%	100%	-%
Don't Know	1	-	1	-	-	1	-	1	1	-	-	1	-	-	-	1	1	-
	*%	-%	1%	-%	-%	2%	-%	2%	2%	-%	-%	2%	-%	-%	-%	1%	1%	-%
		-%	100%	-%	-%	100%	-%	100%	100%	-%	-%	100%	-%	-%	-%	100%	100%	-%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 29**

## **A9. Which supplier(s) do you use for (ISDN2/2e/ ISDN30) services? (MULTI CODE)**

Base : Those who (mostly) use ISN2/2e or ISDN30

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
	Total	NEVER			YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
		LAST YEAR	EVER	/DK															
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	*k	l	m	n	o	p	q	*r
Unweighted total	217	34	128	55	138	55	99	33	156	51	110	22	44	59	45	34	50	62	23
Effective Weighted Sample	165	25	107	37	107	39	72	25	121	41	81	15	36	55	40	28	45	53	20
Total	209	33	119	57	131	53	95	39	151	45	111	22	40	50	38	33	42	55	20
		16%	57%	27%	63%	25%	45%	19%	72%	21%	53%	11%	19%	24%	18%	16%	20%	26%	9%
BT	136	28	62	46	81	36	55	30	89	34	66	19	32	34	29	19	31	42	9
	65%	85%	52%	80%	62%	68%	58%	78%	59%	76%	59%	86%	81%	69%	77%	60%	74%	75%	46%
		b		b															
		21%	46%	34%	60%	27%	40%	22%	65%	25%	49%	14%	24%	25%	21%	14%	23%	31%	7%
Virgin Media (incl. NTL:Telewest)	68	21	40	7	58	7	21	4	58	11	25	*	28	30	26	17	26	36	7
	33%	64%	34%	12%	44%	14%	22%	11%	38%	24%	22%	2%	70%	61%	68%	52%	62%	66%	35%
		bc	c	e															
		31%	59%	10%	85%	11%	31%	6%	84%	16%	36%	1%	41%	44%	37%	25%	38%	53%	10%
AT&T	47	10	36	1	41	2	12	3	41	6	15	-	22	24	20	10	22	28	4
	23%	31%	30%	2%	32%	4%	13%	7%	28%	13%	13%	-%	55%	48%	54%	32%	52%	51%	21%
		c	c	e															
		22%	76%	3%	88%	5%	26%	6%	88%	12%	32%	-%	46%	50%	43%	22%	46%	60%	9%
Colt Communications	46	14	30	3	40	3	20	2	37	9	21	2	15	14	12	15	9	19	5
	22%	42%	25%	5%	31%	6%	21%	6%	25%	20%	19%	8%	39%	28%	32%	45%	22%	34%	24%
		c	c	e												p			
		30%	64%	6%	87%	6%	44%	5%	80%	20%	45%	4%	33%	29%	26%	31%	20%	41%	10%
Daisy Communications	45	17	25	4	37	5	13	1	35	11	13	1	20	24	18	13	18	26	5
	22%	51%	21%	7%	28%	10%	14%	3%	23%	24%	12%	4%	50%	48%	47%	41%	42%	47%	26%
		bc		e															
		37%	54%	8%	83%	12%	29%	2%	77%	23%	29%	2%	44%	53%	39%	29%	39%	57%	11%
Opal Communications	44	14	29	1	37	3	18	2	37	7	20	1	16	14	12	14	9	20	3
	21%	42%	24%	1%	28%	5%	19%	6%	24%	16%	18%	5%	41%	28%	33%	43%	21%	36%	16%
		c	c	e															
		32%	66%	2%	85%	6%	42%	6%	84%	16%	45%	2%	37%	32%	28%	32%	21%	45%	7%
Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																			

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 29**

## **A9. Which supplier(s) do you use for (ISDN2/2e/ ISDN30) services? (MULTI CODE)**

Base : Those who (mostly) use ISN2/2e or ISDN30

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
	Total	NEVER			YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
		LAST YEAR	EVER	/DK															
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	*k	l	m	n	o	p	q	*r
Unweighted total	217	34	128	55	138	55	99	33	156	51	110	22	44	59	45	34	50	62	23
Effective Weighted Sample	165	25	107	37	107	39	72	25	121	41	81	15	36	55	40	28	45	53	20
Total	209	33	119	57	131	53	95	39	151	45	111	22	40	50	38	33	42	55	20
		16%	57%	27%	63%	25%	45%	19%	72%	21%	53%	11%	19%	24%	18%	16%	20%	26%	9%
KCOM (incl. Kingston Communications & Affiniti)	39	10	26	3	33	5	14	5	30	10	18	1	14	14	11	8	12	17	3
	19%	31%	22%	5%	25%	9%	15%	12%	20%	22%	17%	4%	34%	28%	28%	25%	28%	30%	17%
		c	c	e	e														
		26%	67%	7%	85%	13%	37%	12%	75%	25%	47%	2%	35%	35%	27%	21%	30%	42%	9%
Vodafone (inc. Cable & Wireless)	33	8	21	5	24	5	6	1	26	7	8	-	13	19	15	10	16	20	6
	16%	24%	17%	8%	18%	10%	7%	4%	17%	16%	7%	-%	32%	38%	41%	31%	37%	36%	28%
		24%	62%	14%	72%	16%	19%	4%	79%	21%	23%	-%	39%	57%	46%	30%	47%	60%	17%
TalkTalk	33	8	22	2	27	5	13	-	28	5	13	-	13	14	13	5	15	17	2
	16%	25%	19%	4%	21%	9%	14%	-%	18%	11%	12%	-%	33%	28%	34%	14%	35%	31%	11%
		c	c																
		25%	68%	7%	84%	14%	40%	-%	85%	15%	40%	-%	40%	43%	39%	14%	45%	53%	7%
Unicom	31	10	20	1	29	*	11	2	24	7	13	-	11	13	16	6	13	17	2
	15%	30%	17%	1%	22%	1%	11%	5%	16%	15%	11%	-%	27%	26%	41%	18%	30%	30%	8%
		c	c	e	e														
		32%	65%	3%	93%	1%	34%	6%	78%	22%	41%	-%	35%	42%	50%	19%	41%	54%	5%
Global Crossing	28	9	17	2	23	2	10	-	22	6	10	-	11	15	11	8	10	15	3
	13%	28%	14%	3%	18%	5%	10%	-%	14%	14%	9%	-%	29%	30%	29%	25%	24%	27%	16%
		c	e																
		33%	61%	7%	83%	9%	34%	-%	77%	23%	34%	-%	41%	54%	40%	30%	36%	54%	12%
MCI	26	10	15	2	23	2	12	1	21	5	12	-	9	10	11	6	8	13	1
	13%	31%	12%	3%	18%	4%	12%	2%	14%	11%	11%	-%	23%	20%	30%	19%	18%	23%	6%
		bc	e																
		38%	56%	6%	89%	8%	44%	3%	81%	19%	47%	-%	35%	38%	43%	24%	29%	49%	5%
Columns Tested:	a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																		

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r



# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 29

## A9. Which supplier(s) do you use for (ISDN2/2e/ ISDN30) services? (MULTI CODE)

Base : Those who (mostly) use ISN2/2e or ISDN30

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
								UP TO							UP TO				OVER
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	2 YEARS	2 YEARS	YES	NO/DK
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	*k	l	m	n	o	p	q	*r
Unweighted total	217	34	128	55	138	55	99	33	156	51	110	22	44	59	45	34	50	62	23
Effective Weighted Sample	165	25	107	37	107	39	72	25	121	41	81	15	36	55	40	28	45	53	20
Total	209	33	119	57	131	53	95	39	151	45	111	22	40	50	38	33	42	55	20
		16%	57%	27%	63%	25%	45%	19%	72%	21%	53%	11%	19%	24%	18%	16%	20%	26%	9%
XLN	26	9	15	2	23	2	10	1	19	7	10	1	10	12	10	6	9	12	3
	13%	29%	13%	3%	17%	4%	11%	2%	13%	15%	9%	4%	26%	23%	27%	19%	22%	22%	14%
		bc			e														
		36%	57%	7%	86%	7%	39%	3%	74%	26%	39%	3%	40%	44%	39%	23%	35%	47%	11%
Spitfire	24	6	16	2	19	2	8	3	19	5	10	1	8	9	8	6	7	8	4
	11%	18%	14%	3%	15%	4%	8%	8%	13%	10%	9%	5%	19%	18%	20%	18%	16%	15%	22%
		c																	
		26%	68%	7%	81%	9%	34%	12%	81%	19%	42%	4%	32%	38%	33%	25%	29%	35%	19%
Other	3	-	3	-	3	-	3	-	3	-	3	-	-	-	-	-	-	-	-
	1%	-%	3%	-%	2%	-%	3%	-%	2%	-%	3%	-%	-%	-%	-%	-%	-%	-%	-%
		-%	100%	-%	100%	-%	100%	-%	100%	-%	100%	-%	-%	-%	-%	-%	-%	-%	-%
Don't Know	1	-	-	1	-	-	-	-	-	1	-	-	-	-	-	-	1	-	1
	*%	-%	-%	2%	-%	-%	-%	-%	-%	2%	-%	-%	-%	-%	-%	-%	2%	-%	5%
		-%	-%	100%	-%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	-%	100%	-%	100%
Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																			

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 30**

**A10A. Approximately how much does your organisation spend annually, across all UK sites, on ISDN2/2e services? (SINGLE CODE)**

Base : Those who use ISN2/2e (and mostly use an ISDN service)

		COMPANY SIZE				TURNOVER				TELECOMS PROVISION											
		Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP SWITCHED	IP NOT SWITCHED	ANY
			*a	b	c	*d	£1M-£20M	£21M-£100M	£100M	h	i	j	*k	l	*m	n	o	p	q	*r	s
Significance Level: 95%																					
Unweighted total		141	23	32	86	19	39	43	37	141	61	80	-	61	-	67	43	67	53	12	67
Effective Weighted Sample		98	19	31	79	13	28	37	32	98	60	49	-	60	-	55	42	55	44	10	55
Total		139	46	40	53	29	43	35	28	139	52	87	-	52	-	57	37	57	47	9	57
			33%	29%	38%	21%	31%	25%	20%	100%	37%	63%	-%	37%	-%	41%	27%	41%	33%	7%	41%
Less than £1,000	(0.7)	4	4	-	-	3	1	-	-	4	1	3	-	1	-	-	-	-	-	-	-
		3%	9%	-%	-%	11%	3%	-%	-%	3%	2%	4%	-%	2%	-%	-%	-%	-%	-%	-%	-%
			100%	-%	-%	74%	26%	-%	-%	100%	26%	74%	-%	26%	-%	-%	-%	-%	-%	-%	-%
£1,000 to £2,499	(1.8)	23	19	2	1	11	12	-	-	23	2	21	-	2	-	2	1	2	1	1	2
		17%	42%	6%	2%	38%	28%	-%	-%	17%	4%	24%	-%	4%	-%	4%	3%	4%	2%	15%	4%
				84%	11%	5%	47%	fg	-%	-%	ilnopqs	9%	ilnopqs	-%	9%	-%	11%	4%	11%	4%	6%
£5,000 to £9,999	(7.5)	13	10	1	1	10	3	-	-	13	-	13	-	-	-	3	-	3	3	-	3
		9%	23%	3%	2%	34%	6%	-%	-%	9%	-%	15%	-%	-%	-%	5%	-%	5%	7%	-%	5%
				82%	11%	7%	78%	22%	-%	-%	100%	-%	100%	-%	-%	-%	25%	-%	25%	25%	-%
£10,000 to £19,999	(15.0)	13	1	8	4	4	2	7	-	13	3	10	-	3	-	4	3	4	4	-	4
		9%	2%	21%	7%	14%	4%	21%	-%	9%	6%	11%	-%	6%	-%	8%	7%	8%	9%	-%	8%
				8%	64%	28%	31%	14%	55%	-%	100%	26%	74%	-%	26%	-%	34%	20%	34%	34%	-%
£20,000 to £49,999	(35.0)	15	5	6	5	-	11	*	1	15	3	12	-	3	-	2	1	2	2	-	2
		11%	10%	14%	10%	-%	24%	1%	4%	11%	6%	14%	-%	6%	-%	4%	2%	4%	5%	-%	4%
				29%	36%	34%	-%	fg	3%	8%	100%	21%	79%	-%	21%	-%	14%	5%	14%	14%	-%
£50,000 to £99,999	(75.0)	16	3	7	6	-	7	6	2	16	6	10	-	6	-	9	4	9	6	2	9
		12%	6%	18%	12%	-%	17%	18%	8%	12%	12%	11%	-%	12%	-%	15%	12%	15%	12%	24%	15%
			17%	45%	38%	-%	45%	39%	14%	100%	39%	61%	-%	39%	-%	55%	27%	55%	35%	14%	55%

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 30**

**A10A. Approximately how much does your organisation spend annually, across all UK sites, on ISDN2/2e services? (SINGLE CODE)**

Base : Those who use ISN2/2e (and mostly use an ISDN service)

		COMPANY SIZE				TURNOVER				TELECOMS PROVISION											
		Total	UNDER			OVER			ISDN2	ISDN30	ISDN2 ONLY	ISDN30		IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP SWITCHED	IP NOT SWITCHED	ANY	
			1-49	50-249	250+	£1M	£1M-£20M	£21M-£100M				£100M	ONLY								BOTH
Significance Level: 95%			*a	b	c	*d	e	0M f	g	h	i	j	*k	l	*m	n	o	p	q	*r	s
Unweighted total		141	23	32	86	19	39	43	37	141	61	80	-	61	-	67	43	67	53	12	67
Effective Weighted Sample		98	19	31	79	13	28	37	32	98	60	49	-	60	-	55	42	55	44	10	55
Total		139	46	40	53	29	43	35	28	139	52	87	-	52	-	57	37	57	47	9	57
			33%	29%	38%	21%	31%	25%	20%	100%	37%	63%	-%	37%	-%	41%	27%	41%	33%	7%	41%
£100,000 to £249,999	(175.0)	13	-	5	8	-	4	5	5	13	7	6	-	7	-	7	3	7	4	3	7
		9%	-%	13%	15%	-%	9%	14%	17%	9%	14%	7%	-%	14%	-%	12%	9%	12%	8%	36%	12%
			-%	39%	61%	-%	29%	36%	35%	100%	56%	44%	-%	56%	-%	53%	26%	53%	28%	26%	53%
£250,000 to £499,999	(375.0)	11	1	5	5	1	3	5	1	11	6	5	-	6	-	5	4	5	5	-	5
		8%	2%	12%	10%	4%	6%	16%	4%	8%	12%	6%	-%	12%	-%	9%	10%	9%	11%	-%	9%
			10%	43%	47%	10%	23%	49%	11%	100%	57%	43%	-%	57%	-%	44%	33%	44%	44%	-%	44%
£500,000 to £999,999	(750.0)	12	1	4	6	-	-	7	5	12	9	3	-	9	-	9	7	9	9	*	9
		8%	3%	10%	11%	-%	-%	19%	18%	8%	17%	3%	-%	17%	-%	16%	20%	16%	19%	4%	16%
			12%	36%	52%	-%	-%	57%	43%	100%	77%	23%	-%	77%	-%	79%	63%	79%	75%	4%	79%
£1,000,000 to £4,999,999	(3000.0)	3	-	-	3	-	*	1	2	3	2	1	-	2	-	3	2	3	3	*	3
		2%	-%	-%	6%	-%	1%	2%	7%	2%	5%	1%	-%	5%	-%	6%	6%	6%	6%	4%	6%
			-%	-%	100%	-%	13%	25%	62%	100%	74%	26%	-%	74%	-%	100%	74%	100%	87%	13%	100%
£5,000,000 to £9,999,999	(7500.0)	9	-	1	8	-	-	2	7	9	8	*	-	8	-	8	8	8	7	1	8
		6%	-%	3%	14%	-%	-%	5%	24%	6%	16%	*%	-%	16%	-%	14%	22%	14%	16%	8%	14%
			-%	12%	88%	-%	-%	21%	79%	100%	95%	5%	-%	95%	-%	95%	95%	95%	86%	9%	95%
£10,000,000 or more	(10000.0)	4	-	-	4	-	-	1	3	4	3	*	-	3	-	4	3	4	3	1	4
		3%	-%	-%	7%	-%	-%	2%	10%	3%	6%	*%	-%	6%	-%	6%	9%	6%	6%	8%	6%
			-%	-%	100%	-%	-%	22%	78%	100%	88%	12%	-%	88%	-%	100%	88%	100%	78%	22%	100%
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																					

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 30**

**A10A. Approximately how much does your organisation spend annually, across all UK sites, on ISDN2/2e services? (SINGLE CODE)**

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN30		IP NOT ISDN	ISDN2 & IP	ISDN30	ISDN & IP	IP SWITCHED		IP NOT SWITCHED	
					£1M	£1M-£20M	£21M-£100M	OVER £100M			ONLY	BOTH					ISDN	ISDN	ISDN	ISDN
Significance Level: 95%		*a	b	c	*d	e	f	g	h	i	j	*k	l	*m	n	o	p	q	*r	s
Unweighted total	141	23	32	86	19	39	43	37	141	61	80	-	61	-	67	43	67	53	12	67
Effective Weighted Sample	98	19	31	79	13	28	37	32	98	60	49	-	60	-	55	42	55	44	10	55
Total	139	46	40	53	29	43	35	28	139	52	87	-	52	-	57	37	57	47	9	57
		33%	29%	38%	21%	31%	25%	20%	100%	37%	63%	-%	37%	-%	41%	27%	41%	33%	7%	41%
Don't know	3	1	-	2	-	1	1	2	3	-	3	-	-	-	*	-	*	-	-	*
	3%	3%	-%	4%	-%	2%	2%	7%	3%	-%	4%	-%	-%	-%	1%	-%	1%	-%	-%	1%
		40%	-%	60%	-%	24%	24%	52%	100%	-%	100%	-%	-%	-%	12%	-%	12%	-%	-%	12%
Mean amount in £000s	933.8	43.9	358.8	2182.1	19.9	91.1	948.1	3478.5	933.8	2122.5	192.7	-	2122.5	-	2053.7	2914.9	2053.7	2167.3	1709.4	2053.7
				b			e	ef	j	hj			hj		hj	hj	hj	hj		hj
Standard deviation	2371.4	141.72	1194.9	3400.4	72.76	307.83	2216.2	3851.0	2371.4	3327.2	934.54	-	3327.2	-	3297.9	3679.3	3297.9	3325.51	3438.80	3297.9
Standard error	204.10	30.21	211.24	377.82	16.69	50.61	346.11	650.93	204.10	426.01	108.64	-	426.01	-	405.95	561.08	405.95	456.79	992.70	405.95
Columns Tested:	a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																			

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 30**

**A10A. Approximately how much does your organisation spend annually, across all UK sites, on ISDN2/2e services? (SINGLE CODE)**

Base : Those who use ISN2/2e (and mostly use an ISDN service)

		MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
			a	*b	*c	d	e	f	*g	h	*i	j	k	l	*m	n	o	p	q
Significance Level: 95%																			
Unweighted total		141	123	18	-	88	53	33	28	42	25	105	36	94	11	58	83	43	94
Effective Weighted Sample		98	83	18	-	60	37	32	28	34	21	77	22	72	7	42	56	27	81
Total		139	124	16	-	82	57	28	24	38	20	103	37	88	15	62	77	57	80
			89%	11%	-%	59%	41%	20%	17%	27%	14%	74%	26%	63%	11%	45%	55%	41%	57%
Less than £1,000	(0.7)	4	4	-	-	-	4	1	-	-	-	1	3	1	-	4	-	4	-
		3%	3%	-%	-%	-%	7%	4%	-%	-%	-%	1%	9%	1%	-%	7%	-%	7%	-%
			100%	-%	-%	-%	100%	26%	-%	-%	-%	26%	74%	26%	-%	100%	-%	100%	-%
£1,000 to £2,499	(1.8)	23	23	-	-	12	11	1	1	1	1	13	10	5	8	4	19	22	1
		17%	19%	-%	-%	15%	19%	4%	4%	4%	5%	13%	28%	6%	52%	7%	24%	38%	2%
			100%	-%	-%	53%	47%	4%	4%	6%	4%	56%	44%	23%	33%	18%	82%	94%	6%
£5,000 to £9,999	(7.5)	13	13	-	-	6	6	-	-	3	-	9	4	9	-	11	2	9	3
		9%	10%	-%	-%	8%	11%	-%	-%	8%	-%	9%	10%	10%	-%	18%	2%	17%	4%
			100%	-%	-%	50%	50%	-%	-%	25%	-%	71%	29%	71%	-%	86%	14%	75%	25%
£10,000 to £19,999	(15.0)	13	10	3	-	7	6	-	3	*	4	9	4	9	*	10	3	8	5
		9%	8%	16%	-%	8%	11%	-%	14%	1%	20%	9%	10%	10%	3%	16%	4%	14%	6%
			80%	20%	-%	52%	48%	-%	26%	3%	31%	71%	29%	68%	3%	77%	23%	63%	37%
£20,000 to £49,999	(35.0)	15	14	2	-	9	7	2	2	1	1	14	2	12	2	9	7	5	9
		11%	11%	10%	-%	10%	12%	6%	7%	2%	7%	13%	5%	13%	12%	14%	9%	9%	11%
			90%	10%	-%	56%	44%	10%	10%	5%	9%	88%	12%	76%	12%	57%	43%	34%	57%
£50,000 to £99,999	(75.0)	16	15	1	-	10	7	-	6	5	4	10	6	10	-	6	10	6	10
		12%	12%	7%	-%	12%	12%	-%	26%	14%	19%	10%	17%	11%	-%	10%	13%	10%	13%
			94%	6%	-%	60%	40%	-%	39%	32%	23%	61%	39%	61%	-%	39%	61%	35%	65%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																			

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 30

A10A. Approximately how much does your organisation spend annually, across all UK sites, on ISDN2/2e services? (SINGLE CODE)

Base : Those who use ISN2/2e (and mostly use an ISDN service)

		MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
			a	*b	*c	d	e	f	*g	h	*i	j	k	l	*m	n	o	p	q
Significance Level: 95%																			
Unweighted total		141	123	18	-	88	53	33	28	42	25	105	36	94	11	58	83	43	94
Effective Weighted Sample		98	83	18	-	60	37	32	28	34	21	77	22	72	7	42	56	27	81
Total		139	124	16	-	82	57	28	24	38	20	103	37	88	15	62	77	57	80
			89%	11%	-%	59%	41%	20%	17%	27%	14%	74%	26%	63%	11%	45%	55%	41%	57%
£100,000 to £249,999	(175.0)	13	11	2	-	9	4	6	2	5	2	10	3	8	2	6	7	*	13
		9%	9%	15%	-%	11%	8%	20%	8%	12%	12%	10%	8%	9%	15%	10%	9%	1%	16%
			82%	18%	-%	67%	33%	42%	14%	35%	18%	79%	21%	62%	17%	48%	52%	3%	97%
£250,000 to £499,999	(375.0)	11	10	1	-	8	3	2	5	3	2	9	2	9	-	3	8	1	10
		8%	8%	5%	-%	10%	6%	6%	19%	7%	12%	9%	7%	10%	-%	5%	10%	2%	13%
			93%	7%	-%	72%	28%	16%	40%	23%	22%	78%	22%	78%	-%	29%	71%	10%	90%
£500,000 to £999,999	(750.0)	12	7	5	-	7	4	7	2	7	2	10	1	10	-	4	8	-	12
		8%	5%	31%	-%	9%	7%	26%	7%	18%	11%	10%	3%	12%	-%	6%	10%	-%	14%
			57%	43%	-%	65%	35%	63%	14%	60%	19%	89%	11%	89%	-%	33%	67%	-%	100%
£1,000,000 to £4,999,999	(3000.0)	3	3	-	-	3	-	2	-	3	*	3	-	2	1	1	2	-	3
		2%	3%	-%	-%	4%	-%	8%	-%	7%	2%	3%	-%	3%	5%	2%	3%	-%	4%
			100%	-%	-%	100%	-%	74%	-%	87%	13%	100%	-%	75%	25%	38%	62%	-%	100%
£5,000,000 to £9,999,999	(7500.0)	9	7	2	-	7	2	5	3	6	2	8	*	8	-	3	5	-	9
		6%	6%	10%	-%	8%	3%	18%	13%	15%	12%	8%	1%	9%	-%	5%	7%	-%	11%
			82%	18%	-%	82%	18%	58%	37%	67%	28%	95%	5%	95%	-%	37%	63%	-%	100%
£10,000,000 or more	(10000.0)	4	3	1	-	3	1	2	1	4	-	4	-	4	-	-	4	-	4
		3%	2%	5%	-%	3%	1%	8%	3%	10%	-%	3%	-%	4%	-%	-%	5%	-%	4%
			78%	22%	-%	78%	22%	66%	22%	100%	-%	100%	-%	100%	-%	-%	100%	-%	100%
Columns Tested:		a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																	

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 30

A10A. Approximately how much does your organisation spend annually, across all UK sites, on ISDN2/2e services? (SINGLE CODE)

Base : Those who use ISN2/2e (and mostly use an ISDN service)

		MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
	Total	a	*b	*c	d	e	f	*g	h	*i	j	k	l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	141	123	18	-	88	53	33	28	42	25	105	36	94	11	58	83	43	94
Effective Weighted Sample	98	83	18	-	60	37	32	28	34	21	77	22	72	7	42	56	27	81
Total	139	124	16	-	82	57	28	24	38	20	103	37	88	15	62	77	57	80
		89%	11%	-%	59%	41%	20%	17%	27%	14%	74%	26%	63%	11%	45%	55%	41%	57%
Don't know	3	3	-	-	2	2	-	-	*	-	3	1	1	2	-	3	1	1
	3%	3%	-%	-%	2%	3%	-%	-%	1%	-%	3%	2%	1%	12%	-%	5%	1%	2%
		100%	-%	-%	48%	52%	-%	-%	12%	-%	76%	24%	24%	52%	-%	100%	24%	40%
Mean amount in £000s	933.8	852.9	1555.7	-	1251.4	466.4	2685.3	1467.4	2549.9	1125.7	1205.9	171.1	1351.1	220.4	540.0	1265.5	23.9	1599.2
Standard deviation	2371.4	2277.7	3015.0	-	2692.91	1715.73	3548.73	2989.06	3604.14	2451.80	2669.7	825.37	2819.2	743.33	1684.3	2792.6	57.18	2954.1
Standard error	204.10	210.58	710.63	-	293.82	240.25	617.75	564.88	562.87	490.36	265.64	141.55	293.92	247.78	221.16	318.25	8.93	306.33

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 30**

**A10A. Approximately how much does your organisation spend annually, across all UK sites, on ISDN2/2e services? (SINGLE CODE)**

Base : Those who use ISN2/2e (and mostly use an ISDN service)

		SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
		Total	LAST YEAR	EVER	NEVER	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
			*a	b	c	d	e	f	*g	h	i	j	*k	l	m	n	*o	p	q	*r
Significance Level: 95%																				
Unweighted total		141	27	81	33	93	33	55	19	104	30	63	11	37	45	37	22	44	50	17
Effective Weighted Sample		98	19	63	19	67	20	35	13	74	21	42	6	29	41	33	16	39	41	14
Total		139	27	76	37	91	33	56	25	103	26	69	13	33	36	30	21	36	43	14
			19%	54%	26%	65%	23%	41%	18%	74%	19%	50%	9%	24%	26%	21%	15%	26%	31%	10%
Less than £1,000	(0.7)	4	1	-	3	1	-	1	3	1	-	1	3	-	-	-	-	-	-	-
		3%	4%	-%	9%	1%	-%	2%	12%	1%	-%	2%	25%	-%	-%	-%	-%	-%	-%	-%
					b															
			26%	-%	74%	26%	-%	26%	74%	26%	-%	26%	74%	-%	-%	-%	-%	-%	-%	-%
£1,000 to £2,499	(1.8)	23	-	7	16	8	14	13	8	14	5	18	3	-	1	-	1	1	-	2
		17%	-%	10%	43%	8%	43%	23%	30%	13%	19%	25%	25%	-%	4%	-%	5%	4%	-%	17%
					b		d													
			-%	32%	68%	33%	61%	56%	33%	59%	21%	76%	14%	-%	6%	-%	4%	6%	-%	11%
£5,000 to £9,999	(7.5)	13	3	7	3	11	1	7	3	11	2	8	1	3	-	-	3	-	3	-
		9%	12%	9%	8%	12%	4%	12%	11%	11%	7%	12%	11%	9%	-%	-%	15%	-%	7%	-%
			25%	53%	22%	89%	11%	53%	22%	86%	14%	64%	11%	25%	-%	-%	25%	-%	25%	-%
£10,000 to £19,999	(15.0)	13	2	11	-	11	1	8	1	11	2	9	-	-	3	4	4	1	2	3
		9%	7%	15%	-%	12%	2%	14%	3%	10%	9%	12%	-%	-%	7%	12%	17%	2%	4%	18%
			14%	86%	-%	83%	6%	60%	6%	83%	17%	66%	-%	-%	20%	28%	28%	6%	14%	20%
£20,000 to £49,999	(35.0)	15	4	10	1	12	2	10	3	13	2	13	*	1	1	1	1	1	2	-
		11%	15%	13%	3%	14%	5%	18%	13%	12%	9%	18%	3%	4%	2%	5%	7%	2%	5%	-%
			25%	66%	8%	80%	11%	65%	21%	83%	15%	83%	3%	9%	5%	9%	9%	5%	14%	-%
£50,000 to £99,999	(75.0)	16	3	8	5	5	8	3	4	13	3	6	1	3	6	4	3	6	6	3
		12%	13%	11%	13%	6%	23%	6%	15%	13%	13%	9%	8%	10%	18%	13%	13%	17%	13%	23%
					d															
			21%	50%	29%	31%	47%	21%	24%	80%	20%	39%	6%	21%	40%	24%	17%	38%	35%	20%
Columns Tested: a.b.c - d.e - f.g - h.i - j.k - l.m.n - o.p - q.r																				

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r



# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 30**

**A10A. Approximately how much does your organisation spend annually, across all UK sites, on ISDN2/2e services? (SINGLE CODE)**

Base : Those who use ISN2/2e (and mostly use an ISDN service)

		SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
		Total	NEVER			YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
			LAST YEAR	EVER	/DK															
			*a	b	c	d	e	f	*g	h	i	j	*k	l	m	n	*o	p	q	*r
Significance Level: 95%																				
Unweighted total		141	27	81	33	93	33	55	19	104	30	63	11	37	45	37	22	44	50	17
Effective Weighted Sample		98	19	63	19	67	20	35	13	74	21	42	6	29	41	33	16	39	41	14
Total		139	27	76	37	91	33	56	25	103	26	69	13	33	36	30	21	36	43	14
			19%	54%	26%	65%	23%	41%	18%	74%	19%	50%	9%	24%	26%	21%	15%	26%	31%	10%
£100,000 to £249,999	(175.0)	13	1	9	3	9	3	5	1	11	3	6	-	2	3	3	4	3	4	3
		9%	4%	12%	9%	10%	8%	9%	5%	10%	10%	9%	-%	7%	7%	9%	21%	7%	8%	24%
			8%	67%	26%	71%	20%	38%	9%	80%	20%	47%	-%	18%	20%	20%	33%	20%	28%	26%
£250,000 to £499,999	(375.0)	11	1	9	1	9	2	6	*	8	3	5	1	5	3	3	2	3	5	-
		8%	4%	12%	3%	10%	7%	10%	2%	8%	11%	8%	7%	15%	10%	9%	7%	9%	12%	-%
			10%	79%	11%	78%	22%	52%	4%	75%	25%	48%	7%	44%	31%	25%	14%	31%	44%	-%
£500,000 to £999,999	(750.0)	12	3	8	*	11	*	2	-	11	*	2	-	6	7	4	-	9	9	-
		8%	12%	10%	1%	12%	1%	4%	-%	11%	2%	3%	-%	19%	19%	15%	-%	25%	21%	-%
			27%	69%	4%	93%	4%	21%	-%	96%	4%	21%	-%	54%	60%	38%	-%	79%	79%	-%
£1,000,000 to £4,999,999	(3000.0)	3	2	1	*	2	*	-	-	2	1	-	-	1	2	3	1	2	2	1
		2%	6%	2%	1%	3%	1%	-%	-%	2%	3%	-%	-%	4%	6%	9%	6%	5%	6%	6%
			49%	38%	13%	74%	13%	-%	-%	75%	25%	-%	-%	38%	62%	87%	38%	62%	75%	25%
£5,000,000 to £9,999,999	(7500.0)	9	4	3	1	7	1	*	-	5	3	*	-	7	7	5	2	7	8	-
		6%	16%	4%	3%	8%	4%	1%	-%	5%	12%	1%	-%	22%	20%	17%	8%	18%	19%	-%
			49%	37%	14%	86%	14%	5%	-%	63%	37%	5%	-%	86%	86%	58%	18%	77%	95%	-%
£10,000,000 or more	(10000.0)	4	2	1	1	3	-	-	-	2	2	-	-	3	2	4	-	4	2	1
		3%	7%	1%	2%	3%	-%	-%	-%	2%	6%	-%	-%	8%	7%	12%	-%	10%	5%	9%
			56%	22%	22%	78%	-%	-%	-%	56%	44%	-%	-%	78%	66%	100%	-%	100%	66%	34%
Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																				

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 30**

**A10A. Approximately how much does your organisation spend annually, across all UK sites, on ISDN2/2e services? (SINGLE CODE)**

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	SWITCHING ISDN SUPPLIER				CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
	Total	NEVER			YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
		LAST YEAR	EVER	/DK															
Significance Level: 95%		*a	b	c	d	e	f	*g	h	i	j	*k	l	m	n	*o	p	q	*r
Unweighted total	141	27	81	33	93	33	55	19	104	30	63	11	37	45	37	22	44	50	17
Effective Weighted Sample	98	19	63	19	67	20	35	13	74	21	42	6	29	41	33	16	39	41	14
Total	139	27	76	37	91	33	56	25	103	26	69	13	33	36	30	21	36	43	14
		19%	54%	26%	65%	23%	41%	18%	74%	19%	50%	9%	24%	26%	21%	15%	26%	31%	10%
Don't know	3	*	1	2	1	-	1	2	1	-	*	3	-	-	-	-	-	-	*
	3%	2%	2%	5%	1%	-%	1%	9%	1%	-%	1%	21%	-%	-%	-%	-%	-%	-%	3%
		12%	40%	48%	36%	-%	24%	64%	36%	-%	12%	76%	-%	-%	-%	-%	-%	-%	12%
Mean amount in £000s	933.8	2252.3	635.2	572.0	1162.3	388.5	157.9	35.4	811.6	1707.9	133.6	42.7	2852.6	2570.0	2895.6	829.7	2749.5	2348.2	1120.1
Standard deviation	2371.4	3532.8	1822.1	2027.8	2602.4	1461.3	669.03	64.88	2148.1	3290.1	602.98	108.90	3709.72	3532.4	3786.72	2088.6	3665.2	3376.8	2956.1
Standard error	204.10	692.85	203.72	376.56	274.32	254.38	91.90	16.22	213.74	600.69	76.58	41.16	609.87	526.58	622.53	445.29	552.55	477.55	739.02

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 31**

**A10B. Approximately how much does your organisation spend annually, across all UK sites, on ISDN30 services? (SINGLE CODE)**

Base : Those who use ISN30 (and mostly use an ISDN service)

		COMPANY SIZE				TURNOVER				TELECOMS PROVISION											
		Total	UNDER			OVER			ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP SWITCHED	IP NOT SWITCHED	ANY IP	
			1-49	50-249	250+	£1M	£1M-£20M	£21M-£100M													£100M
Significance Level: 95%			*a	b	c	*d	e	f	g	h	i	*j	k	l	*m	n	o	p	q	*r	s
Unweighted total		137	25	32	79	16	37	45	37	61	137	-	76	61	-	43	61	61	52	8	61
Effective Weighted Sample		133	25	32	79	16	36	44	36	60	133	-	74	60	-	42	60	60	51	8	60
Total		122	26	33	62	16	35	41	29	52	122	-	70	52	-	37	54	54	47	7	54
			22%	27%	51%	13%	29%	33%	24%	43%	100%	-%	57%	43%	-%	30%	45%	45%	38%	6%	45%
Less than £1,000	(0.7)	1	-	1	-	-	1	-	-	1	1	-	-	1	-	1	1	1	1	-	1
		1%	-%	3%	-%	-%	3%	-%	-%	2%	1%	-%	-%	2%	-%	3%	2%	2%	2%	-%	2%
			-%	100%	-%	-%	100%	-%	-%	100%	100%	-%	-%	100%	-%	100%	100%	100%	100%	-%	100%
£1,000 to £2,499	(1.8)	4	3	1	-	2	2	-	-	1	4	-	3	1	-	-	1	1	1	-	1
		4%	13%	3%	-%	14%	6%	-%	-%	2%	4%	-%	5%	2%	-%	-%	2%	2%	2%	-%	2%
			77%	23%	-%	51%	49%	-%	-%	26%	100%	-%	74%	26%	-%	-%	26%	26%	26%	-%	26%
£5,000 to £9,999	(7.5)	6	4	1	1	1	4	1	-	-	6	-	6	-	-	-	2	2	1	1	2
		5%	16%	3%	1%	6%	12%	2%	-%	-%	5%	-%	9%	-%	-%	-%	4%	4%	2%	15%	4%
			70%	17%	13%	16%	71%	13%	-%	-%	100%	-%	100%	-%	-%	-%	33%	33%	17%	16%	33%
£10,000 to £19,999	(15.0)	14	6	2	6	5	7	1	1	3	14	-	11	3	-	3	3	3	3	-	3
		12%	23%	6%	10%	29%	21%	2%	3%	6%	12%	-%	16%	6%	-%	9%	6%	6%	7%	-%	6%
			42%	14%	44%	32%	50%	7%	5%	23%	100%	-%	77%	23%	-%	23%	23%	23%	23%	-%	23%
£20,000 to £49,999	(35.0)	14	7	2	5	3	6	3	2	5	14	-	9	5	-	2	4	4	4	-	4
		12%	28%	6%	8%	20%	18%	8%	6%	10%	12%	-%	13%	10%	-%	5%	7%	7%	8%	-%	7%
			52%	14%	33%	22%	43%	22%	12%	37%	100%	-%	63%	37%	-%	13%	28%	28%	28%	-%	28%
£50,000 to £99,999	(75.0)	15	2	5	8	2	6	7	1	4	15	-	11	4	-	2	5	5	4	1	5
		12%	8%	16%	13%	10%	16%	17%	3%	7%	12%	-%	16%	7%	-%	5%	10%	10%	9%	15%	10%
			13%	34%	53%	11%	37%	47%	5%	24%	100%	-%	76%	24%	-%	12%	36%	36%	29%	7%	36%
£100,000 to £249,999	(175.0)	13	1	4	8	1	3	6	3	7	13	-	6	7	-	4	5	5	3	1	5
		11%	4%	13%	13%	6%	8%	15%	11%	13%	11%	-%	9%	13%	-%	11%	10%	10%	7%	12%	10%
			8%	32%	61%	8%	22%	46%	24%	50%	100%	-%	50%	50%	-%	32%	40%	40%	26%	6%	40%

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 31**

**A10B. Approximately how much does your organisation spend annually, across all UK sites, on ISDN30 services? (SINGLE CODE)**

Base : Those who use ISN30 (and mostly use an ISDN service)

		COMPANY SIZE				TURNOVER				TELECOMS PROVISION											
		Total	UNDER			OVER			ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP SWITCHED	IP NOT SWITCHED	ANY	
			1-49	50-249	250+	£1M	£1M-£20M	£21M-£100M	£100M												
			*a	b	c	*d	e	f	g	h	i	*j	k	l	*m	n	o	p	q	*r	s
Significance Level: 95%																					
Unweighted total		137	25	32	79	16	37	45	37	61	137	-	76	61	-	43	61	61	52	8	61
Effective Weighted Sample		133	25	32	79	16	36	44	36	60	133	-	74	60	-	42	60	60	51	8	60
Total		122	26	33	62	16	35	41	29	52	122	-	70	52	-	37	54	54	47	7	54
			22%	27%	51%	13%	29%	33%	24%	43%	100%	-%	57%	43%	-%	30%	45%	45%	38%	6%	45%
£250,000 to £499,999	(375.0)	9	-	5	4	-	1	6	2	3	9	-	6	3	-	3	6	6	5	1	6
		7%	-%	16%	6%	-%	2%	15%	6%	7%	7%	-%	8%	7%	-%	7%	10%	10%	11%	12%	10%
		-%	57%	43%	-%	9%	65%	17%	37%	100%	-%	63%	37%	-%	29%	63%	63%	54%	9%	63%	
£500,000 to £999,999	(750.0)	17	-	5	12	-	4	6	7	8	17	-	9	8	-	3	8	8	6	2	8
		14%	-%	16%	19%	-%	12%	14%	25%	15%	14%	-%	14%	15%	-%	9%	15%	15%	12%	35%	15%
		-%	30%	70%	-%	25%	34%	42%	45%	100%	-%	55%	45%	-%	20%	47%	47%	34%	14%	47%	
£1,000,000 to £4,999,999	(3000.0)	10	-	5	5	-	-	8	2	8	10	-	2	8	-	8	8	8	8	-	8
		8%	-%	16%	8%	-%	-%	19%	8%	15%	8%	-%	3%	15%	-%	22%	15%	15%	17%	-%	15%
		-%	52%	48%	-%	-%	e	24%	k	100%	-%	18%	82%	-%	82%	82%	82%	82%	82%	-%	82%
£5,000,000 to £9,999,999	(7500.0)	9	-	1	8	-	-	1	8	7	9	-	2	7	-	7	7	7	7	-	7
		7%	-%	3%	13%	-%	-%	3%	28%	14%	7%	-%	2%	14%	-%	20%	13%	13%	16%	-%	13%
		-%	12%	88%	-%	-%	12%	88%	82%	100%	-%	18%	82%	-%	82%	82%	82%	82%	82%	-%	82%
£10,000,000 or more	(10000.0)	5	-	-	5	-	1	2	2	4	5	-	1	4	-	3	3	3	2	1	3
		4%	-%	-%	8%	-%	2%	4%	8%	8%	4%	-%	1%	8%	-%	9%	6%	6%	5%	12%	6%
		-%	-%	100%	-%	17%	33%	50%	83%	100%	-%	17%	83%	-%	67%	67%	67%	50%	17%	67%	
Don't know		4	2	-	2	2	-	1	1	1	4	-	3	1	-	-	-	-	-	-	-
		3%	9%	-%	3%	14%	-%	2%	3%	2%	3%	-%	4%	2%	-%	-%	-%	-%	-%	-%	-%
		59%	-%	41%	59%	-%	21%	21%	21%	100%	-%	79%	21%	-%	-%	-%	-%	-%	-%	-%	-%
Mean amount in £000s		1393.3	29.5	915.9	2194.3	35.6	358.9	1365.5	3470.6	2481.6	1393.3	-	554.3	2481.6	-	3127.5	2214.1	2214.1	2361.6	1507.0	2214.1
				b			e	ef	ik	k			ik		ik	k	k	ik		k	
Standard deviation		2691.6	36.77	1586.2	3360.5	46.37	1501.6	2347.8	3719.6	3363.2	2691.6	-	1610.2	3363.2	-	3513.4	3178.3	3178.3	3195.41	3360.64	3178.3
Standard error		233.39	7.67	280.41	382.97	12.39	246.87	353.94	619.93	434.18	233.39	-	188.45	434.18	-	535.79	406.94	406.94	443.12	1188.17	406.94
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																					

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 31**

**A10B. Approximately how much does your organisation spend annually, across all UK sites, on ISDN30 services? (SINGLE CODE)**

Base : Those who use ISN30 (and mostly use an ISDN service)

		MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
			a	b	*c	d	*e	f	g	h	*i	j	k	l	*m	n	o	p	q
Significance Level: 95%																			
Unweighted total		137	43	94	-	40	21	83	54	40	21	105	32	94	11	66	71	40	94
Effective Weighted Sample		133	42	91	-	40	21	80	53	39	21	103	30	92	11	64	70	38	93
Total		122	36	85	-	33	19	73	49	36	19	93	29	84	9	60	61	38	81
			30%	70%	-%	27%	15%	60%	40%	29%	15%	76%	24%	69%	8%	50%	50%	31%	66%
Less than £1,000	(0.7)	1	1	-	-	1	-	-	1	-	1	1	-	1	-	1	-	1	-
		1%	3%	-%	-%	3%	-%	-%	2%	-%	6%	1%	-%	1%	-%	2%	-%	3%	-%
			100%	-%	-%	100%	-%	-%	100%	-%	100%	100%	-%	100%	-%	100%	-%	100%	-%
£1,000 to £2,499	(1.8)	4	1	3	-	-	1	3	1	1	-	2	2	2	-	3	1	3	1
		4%	3%	4%	-%	-%	6%	5%	2%	3%	-%	2%	7%	3%	-%	5%	2%	9%	1%
																		q	
£5,000 to £9,999	(7.5)		26%	74%	-%	-%	26%	77%	23%	26%	-%	51%	49%	51%	-%	74%	26%	77%	23%
		6	-	6	-	-	-	2	4	-	2	4	2	2	2	5	1	5	1
		5%	-%	7%	-%	-%	-%	3%	8%	-%	11%	4%	7%	2%	21%	8%	2%	14%	1%
£10,000 to £19,999	(15.0)		-%	100%	-%	-%	-%	33%	67%	-%	33%	64%	36%	33%	32%	84%	16%	87%	13%
		14	1	14	-	1	3	7	7	1	3	9	6	6	3	7	8	11	3
		12%	2%	16%	-%	2%	14%	10%	15%	2%	14%	9%	20%	7%	34%	11%	13%	29%	4%
£20,000 to £49,999	(35.0)		a					dh										q	
			5%	95%	-%	5%	18%	50%	50%	5%	18%	60%	40%	39%	22%	47%	53%	77%	23%
		14	4	11	-	2	3	7	8	3	1	10	5	10	-	11	4	6	8
£50,000 to £99,999	(75.0)	12%	10%	12%	-%	7%	15%	9%	16%	8%	6%	10%	16%	11%	-%	18%	6%	16%	10%
			26%	74%	-%	17%	20%	46%	54%	20%	7%	67%	33%	67%	-%	74%	26%	44%	56%
		15	4	11	-	2	2	9	6	4	1	9	6	9	-	9	6	8	7
		12%	10%	13%	-%	5%	11%	12%	13%	12%	6%	10%	20%	11%	-%	15%	10%	22%	8%
			24%	76%	-%	11%	14%	57%	43%	29%	7%	62%	38%	62%	-%	58%	42%	55%	45%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																			

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 31

A10B. Approximately how much does your organisation spend annually, across all UK sites, on ISDN30 services? (SINGLE CODE)

Base : Those who use ISN30 (and mostly use an ISDN service)

		MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER		
		Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
			a	b	*c	d	*e	f	g	h	*i	j	k	l	*m	n	o	p	q
Significance Level: 95%		137	43	94	-	40	21	83	54	40	21	105	32	94	11	66	71	40	94
Unweighted total		133	42	91	-	40	21	80	53	39	21	103	30	92	11	64	70	38	93
Effective Weighted Sample		122	36	85	-	33	19	73	49	36	19	93	29	84	9	60	61	38	81
Total			30%	70%	-%	27%	15%	60%	40%	29%	15%	76%	24%	69%	8%	50%	50%	31%	66%
£100,000 to £249,999	(175.0)	13	4	9	-	5	2	9	4	2	3	10	3	6	3	4	9	3	10
		11%	11%	11%	-%	14%	10%	12%	9%	5%	18%	10%	12%	7%	36%	7%	14%	7%	13%
			30%	70%	-%	36%	14%	66%	34%	14%	26%	74%	26%	48%	26%	32%	68%	22%	78%
£250,000 to £499,999	(375.0)	9	2	7	-	1	2	7	2	5	1	8	1	8	-	4	5	-	9
		7%	5%	9%	-%	3%	13%	10%	4%	14%	4%	9%	3%	10%	-%	6%	8%	-%	11%
			20%	80%	-%	11%	26%	80%	20%	54%	9%	91%	9%	91%	-%	43%	57%	-%	100%
£500,000 to £999,999	(750.0)	17	8	9	-	6	2	10	7	4	4	16	1	16	-	9	8	-	17
		14%	21%	11%	-%	18%	8%	14%	14%	10%	24%	17%	3%	19%	-%	15%	13%	-%	21%
			45%	55%	-%	35%	9%	60%	40%	21%	26%	k	5%	95%	-%	52%	48%	-%	p
£1,000,000 to £4,999,999	(3000.0)	10	4	6	-	6	2	8	2	6	2	9	1	8	1	4	6	-	10
		8%	11%	7%	-%	18%	11%	11%	3%	18%	8%	10%	3%	10%	9%	6%	10%	-%	12%
			40%	60%	-%	g	11%	84%	16%	g	16%	92%	8%	84%	8%	37%	63%	-%	p
£5,000,000 to £9,999,999	(7500.0)	9	6	3	-	6	2	5	4	7	1	9	-	9	-	3	6	-	9
		7%	16%	4%	-%	17%	8%	7%	8%	18%	4%	10%	-%	11%	-%	5%	9%	-%	11%
			b																p
£10,000,000 or more	(10000.0)	5	3	2	-	3	1	4	1	3	-	4	1	4	-	-	5	-	5
		4%	9%	2%	-%	9%	4%	5%	2%	9%	-%	4%	3%	5%	-%	-%	8%	-%	6%
			67%	33%	-%	67%	17%	83%	17%	67%	-%	83%	17%	83%	-%	-%	n	100%	100%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																			

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 31**

**A10B. Approximately how much does your organisation spend annually, across all UK sites, on ISDN30 services? (SINGLE CODE)**

Base : Those who use ISN30 (and mostly use an ISDN service)

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	b	*c	d	*e	f	g	h	*i	j	k	l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	137	43	94	-	40	21	83	54	40	21	105	32	94	11	66	71	40	94
Effective Weighted Sample	133	42	91	-	40	21	80	53	39	21	103	30	92	11	64	70	38	93
Total	122	36	85	-	33	19	73	49	36	19	93	29	84	9	60	61	38	81
		30%	70%	-%	27%	15%	60%	40%	29%	15%	76%	24%	69%	8%	50%	50%	31%	66%
Don't know	4	-	4	-	1	-	2	2	-	-	2	2	2	-	1	3	-	1
	3%	-%	4%	-%	2%	-%	3%	4%	-%	-%	2%	7%	2%	-%	2%	4%	-%	1%
		-%	100%	-%	21%	-%	50%	50%	-%	-%	50%	50%	50%	-%	29%	71%	-%	21%
Mean amount in £000s	1393.3	2579.0	861.6	-	3041.9	1516.7	1611.4	1061.7	2949.3	805.2	1669.8	461.1	1821.3	327.3	753.4	2038.7	40.6	2040.0
		b			fg				fg		k				n			p
Standard deviation	2691.6	3510.4	2041.7	-	3553.26	2841.41	2855.46	2413.38	3533.86	1668.70	2859.9	1765.8	2967.7	869.84	1770.5	3266.8	46.76	3072.7
Standard error	233.39	535.33	215.21	-	568.98	620.05	317.27	334.68	558.75	364.14	281.80	322.40	309.41	262.27	219.61	396.16	7.39	318.63

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 31**

**A10B. Approximately how much does your organisation spend annually, across all UK sites, on ISDN30 services? (SINGLE CODE)**

Base : Those who use ISN30 (and mostly use an ISDN service)

		SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
		Total	NEVER			YES	NO	YES	NO/DK	UP TO		YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO		YES	NO/DK
			LAST YEAR	EVER	/DK					3 YEARS	4+ YEARS						2 YEARS	2 YEARS		
			*a	b	*c	d	*e	f	*g	h	i	j	*k	l	m	n	*o	p	q	*r
Significance Level: 95%																				
Unweighted total		137	26	83	28	95	29	59	17	102	32	64	12	34	47	31	25	36	48	13
Effective Weighted Sample		133	26	80	27	92	28	57	17	99	31	62	12	33	46	30	25	35	47	13
Total		122	22	74	25	83	26	51	16	91	28	56	11	30	42	27	23	31	43	12
			18%	61%	21%	68%	21%	42%	13%	74%	23%	46%	9%	25%	34%	22%	19%	26%	35%	10%
Less than £1,000	(0.7)	1	-	1	-	-	1	-	-	1	-	-	-	-	-	-	1	-	-	1
		1%	-%	1%	-%	-%	4%	-%	-%	1%	-%	-%	-%	-%	-%	-%	4%	-%	-%	9%
			-%	100%	-%	-%	100%	-%	-%	100%	-%	-%	-%	-%	-%	-%	100%	-%	-%	100%
£1,000 to £2,499	(1.8)	4	1	2	1	3	1	2	1	3	1	3	-	-	1	-	1	-	1	-
		4%	5%	3%	4%	4%	4%	4%	7%	4%	4%	6%	-%	-%	3%	-%	5%	-%	3%	-%
			26%	49%	26%	74%	26%	49%	26%	74%	26%	74%	-%	-%	26%	-%	26%	-%	26%	-%
£5,000 to £9,999	(7.5)	6	1	4	1	4	2	3	1	3	3	4	-	1	1	1	2	-	-	2
		5%	4%	5%	4%	5%	8%	6%	7%	3%	10%	7%	-%	3%	2%	4%	9%	-%	-%	17%
			16%	67%	16%	67%	33%	48%	19%	51%	49%	67%	-%	16%	16%	17%	33%	-%	-%	33%
£10,000 to £19,999	(15.0)	14	1	9	5	9	5	7	4	9	4	8	3	-	3	2	2	2	3	1
		12%	4%	12%	20%	11%	18%	14%	24%	10%	16%	15%	27%	-%	8%	7%	8%	5%	6%	7%
			5%	60%	34%	60%	32%	50%	27%	62%	30%	57%	20%	-%	23%	12%	12%	11%	18%	5%
£20,000 to £49,999	(35.0)	14	3	8	3	10	3	8	2	12	2	9	2	3	3	2	4	-	3	1
		12%	13%	11%	12%	11%	11%	17%	12%	13%	8%	15%	17%	10%	7%	8%	17%	-%	7%	9%
			20%	59%	20%	67%	21%	59%	13%	85%	15%	60%	12%	21%	20%	15%	28%	-%	20%	7%
£50,000 to £99,999	(75.0)	15	1	11	4	9	4	6	4	13	2	8	2	2	4	2	4	1	4	2
		12%	4%	14%	14%	10%	17%	12%	22%	15%	6%	14%	17%	6%	11%	7%	19%	3%	8%	16%
			5%	71%	24%	57%	29%	40%	24%	88%	12%	52%	12%	12%	29%	12%	29%	7%	24%	12%
£100,000 to £249,999	(175.0)	13	1	10	2	8	3	6	2	10	3	7	1	2	3	3	3	3	3	2
		11%	4%	14%	7%	9%	13%	12%	11%	11%	10%	12%	7%	8%	8%	10%	11%	8%	8%	16%
			6%	80%	14%	58%	26%	46%	14%	78%	22%	54%	6%	18%	24%	20%	20%	20%	26%	14%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r



# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 31**

**A10B. Approximately how much does your organisation spend annually, across all UK sites, on ISDN30 services? (SINGLE CODE)**

Base : Those who use ISN30 (and mostly use an ISDN service)

		SWITCHING ISDN SUPPLIER				CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
		NEVER							UP TO 3 YEARS		4+ YEARS				SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS		
		LAST YEAR	EVER	/DK	YES	NO	YES	NO/DK			YES	NO/DK								YES	NO/DK
		Total	*a	b	*c	d	*e	f	*g	h	i	j	*k	l	VOIP m	n	*o	p	q	*r	
Significance Level: 95%																					
Unweighted total		137	26	83	28	95	29	59	17	102	32	64	12	34	47	31	25	36	48	13	
Effective Weighted Sample		133	26	80	27	92	28	57	17	99	31	62	12	33	46	30	25	35	47	13	
Total		122	22	74	25	83	26	51	16	91	28	56	11	30	42	27	23	31	43	12	
			18%	61%	21%	68%	21%	42%	13%	74%	23%	46%	9%	25%	34%	22%	19%	26%	35%	10%	
£250,000 to £499,999		(375.0)	9	1	5	3	8	1	3	-	6	3	3	-	3	5	3	2	4	5	1
			7%	5%	7%	13%	9%	3%	7%	-%	7%	9%	6%	-%	10%	12%	11%	8%	12%	11%	7%
				11%	54%	35%	83%	9%	37%	-%	71%	29%	37%	-%	31%	54%	31%	20%	43%	54%	9%
£500,000 to £999,999		(750.0)	17	5	9	3	12	3	9	-	14	2	7	2	5	5	3	2	6	7	1
			14%	22%	12%	13%	14%	12%	17%	-%	15%	8%	13%	15%	16%	13%	13%	9%	19%	17%	7%
				29%	52%	19%	71%	19%	53%	-%	81%	14%	43%	9%	27%	32%	20%	12%	35%	43%	5%
£1,000,000 to £4,999,999		(3000.0)	10	2	8	-	10	-	2	-	8	2	2	-	5	6	3	1	7	7	1
			8%	7%	11%	-%	12%	-%	4%	-%	8%	8%	3%	-%	16%	16%	13%	3%	23%	17%	7%
				16%	84%	-%	100%	-%	18%	-%	76%	24%	18%	-%	47%	66%	34%	8%	74%	74%	8%
£5,000,000 to £9,999,999		(7500.0)	9	5	4	-	9	-	2	-	7	2	2	-	7	7	5	2	6	7	-
			7%	22%	5%	-%	11%	-%	3%	-%	7%	8%	3%	-%	24%	16%	18%	7%	18%	17%	-%
				56%	44%	-%	100%	-%	18%	-%	73%	27%	18%	-%	82%	73%	56%	18%	65%	82%	-%
£10,000,000 or more		(10000.0)	5	2	1	2	3	1	1	1	2	2	1	1	2	2	3	-	3	2	1
			4%	11%	1%	6%	4%	3%	2%	5%	3%	8%	1%	7%	8%	6%	12%	-%	10%	6%	7%
				50%	17%	33%	67%	17%	17%	17%	50%	50%	17%	17%	50%	50%	67%	-%	67%	50%	17%
Don't know			4	-	2	2	-	2	2	2	1	3	1	-	-	-	-	-	-	-	-
			3%	-%	3%	8%	-%	7%	4%	12%	2%	3%	5%	10%	-%	-%	-%	-%	-%	-%	-%
				-%	50%	50%	-%	50%	50%	50%	21%	71%	29%	-%	-%	-%	-%	-%	-%	-%	-%
Mean amount in £000s		1393.3	3144.0	1023.6	863.0	1711.6	481.2	714.4	600.9	1258.4	1906.1	636.7	978.4	3267.7	2383.3	3073.3	751.8	3295.2	2545.4	999.6	
Standard deviation		2691.6	3833.1	2072.1	2530.1	2856.3	1800.3	1850.8	2352.0	2486.2	3340.6	1779.7	2854.3	3595.61	3256.3	3773.87	1951.4	3492.0	3256.4	2650.9	
Standard error		233.39	751.73	230.23	496.20	293.05	346.46	245.14	607.28	248.62	599.98	227.87	860.59	616.64	474.98	677.81	390.27	582.00	470.03	735.22	

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 32

## A11. Approximately how long have you been using your (ISDN2/2e/ ISDN30) services? (SINGLE CODE)

Base : Those who (mostly) use ISN2/2e or ISDN30

		COMPANY SIZE				TURNOVER				TELECOMS PROVISION											
		Total	UNDER			OVER			ISDN2	ISDN30	ISDN2 ONLY	ISDN30 BOTH	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN	IP SWITCHED		IP NOT SWITCHED		ANY IP
			1-49	50-249	250+	£1M	£1M-£20M	£21M-£100M									£100M	ISDN	ISDN	ISDN	
Significance Level: 95%			a	b	c	d	e	f	g	h	i	j	k	l	*m	n	o	p	q	*r	s
Unweighted total		217	44	52	120	30	67	64	52	141	137	80	76	61	-	67	61	85	67	16	85
Effective Weighted Sample		165	35	51	112	21	53	58	46	98	133	49	74	60	-	55	60	73	58	14	73
Total		209	68	61	79	40	70	54	39	139	122	87	70	52	-	57	54	75	61	13	75
			33%	29%	38%	19%	34%	26%	19%	67%	58%	42%	33%	25%	-%	28%	26%	36%	29%	6%	36%
Less than 6 months	(0.4)	2	1	1	-	-	1	1	-	1	1	1	1	-	-	-	1	1	1	-	1
		1%	1%	2%	-%	-%	1%	3%	-%	1%	1%	2%	1%	-%	-%	-%	2%	1%	2%	-%	1%
			42%	58%	-%	-%	42%	58%	-%	58%	42%	58%	42%	-%	-%	-%	42%	42%	42%	-%	42%
6 to 12 months	(0.8)	13	8	1	3	5	2	1	2	10	5	8	3	2	-	2	4	4	4	-	4
		6%	12%	2%	4%	13%	3%	1%	4%	7%	4%	9%	4%	5%	-%	4%	8%	6%	7%	-%	6%
						f															
12 to 18 months	(1.3)	21	11	4	6	8	8	3	3	16	8	13	5	3	-	8	2	9	9	-	9
		10%	16%	7%	8%	19%	11%	6%	7%	11%	7%	15%	8%	6%	-%	13%	3%	11%	14%	-%	11%
												o						o			
18 to 24 months	(1.8)	41	16	13	12	12	16	10	3	19	27	14	22	5	-	7	8	11	9	1	11
		19%	23%	21%	16%	30%	23%	18%	7%	14%	22%	16%	31%	10%	-%	12%	14%	14%	16%	11%	14%
						g	g				l	hjlnoqq									
2 to 5 years	(3.5)		38%	31%	30%	29%	39%	25%	7%	46%	67%	33%	54%	13%	-%	17%	19%	27%	23%	3%	27%
		73	27	26	20	11	28	21	12	56	35	39	18	17	-	18	16	24	15	8	24
		35%	39%	43%	26%	28%	40%	38%	31%	40%	28%	45%	26%	32%	-%	31%	29%	32%	25%	60%	32%
				c								ikq									
6 to 10 years	(8.0)		36%	36%	28%	15%	38%	28%	17%	76%	47%	53%	24%	23%	-%	24%	21%	32%	20%	11%	32%
		34	1	13	20	2	10	13	9	20	28	6	14	14	-	12	14	15	14	2	15
		16%	2%	21%	25%	5%	14%	25%	23%	14%	23%	7%	21%	26%	-%	21%	26%	20%	22%	12%	20%
				a	a			d			j	j	j	j		j	j	j	j	j	j
10 to 15 years	(12.4)		4%	37%	58%	5%	28%	39%	27%	58%	82%	18%	42%	40%	-%	35%	42%	45%	40%	5%	45%
		12	3	1	8	1	4	3	3	10	7	4	2	6	-	4	3	4	4	*	4
		6%	5%	2%	10%	2%	5%	6%	8%	7%	6%	5%	2%	11%	-%	7%	6%	6%	6%	3%	6%
												k									
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s			27%	9%	65%	7%	30%	29%	27%	87%	63%	37%	13%	49%	-%	36%	29%	36%	33%	4%	36%

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 32**

**A11. Approximately how long have you been using your (ISDN2/2e/ ISDN30) services? (SINGLE CODE)**

Base : Those who (mostly) use ISN2/2e or ISDN30

		COMPANY SIZE				TURNOVER				TELECOMS PROVISION											
						UNDER				ISDN30				IP				IP NOT		ANY	
		Total	1-49	50-249	250+	£1M	£1M-£20M	£21M-£100M	OVER £100M	ISDN2	ISDN30 ONLY	ISDN2 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP SWITCHED	IP NOT SWITCHED		
			a	b	c	d	e	f	g	h	i	j	k	l	*m	n	o	p	q	*r	s
Significance Level: 95%																					
Unweighted total		217	44	52	120	30	67	64	52	141	137	80	76	61	-	67	61	85	67	16	85
Effective Weighted Sample		165	35	51	112	21	53	58	46	98	133	49	74	60	-	55	60	73	58	14	73
Total		209	68	61	79	40	70	54	39	139	122	87	70	52	-	57	54	75	61	13	75
			33%	29%	38%	19%	34%	26%	19%	67%	58%	42%	33%	25%	-%	28%	26%	36%	29%	6%	36%
16 to 20 years	(18.0)	7	-	1	6	-	2	*	4	3	6	1	3	2	-	3	3	4	3	1	4
		3%	-%	2%	7%	-%	3%	1%	11%	2%	5%	1%	5%	5%	-%	5%	6%	5%	5%	8%	5%
									f												
Over 20 years	(22.0)	3	-	-	3	-	-	1	2	3	3	-	-	3	-	3	3	3	2	1	3
		2%	-%	-%	4%	-%	-%	1%	6%	2%	3%	-%	-%	6%	-%	5%	6%	4%	4%	6%	4%
														k		k					
			-%	-%	100%	-%	-%	25%	75%	100%	100%	-%	-%	100%	-%	100%	100%	100%	75%	25%	100%
Don't know		2	1	-	1	1	*	*	*	1	1	1	1	-	-	*	-	*	-	-	*
		1%	2%	-%	2%	3%	1%	1%	1%	1%	1%	1%	2%	-%	-%	1%	-%	1%	-%	-%	1%
			47%	-%	53%	47%	18%	18%	18%	53%	47%	53%	47%	-%	-%	18%	-%	18%	-%	-%	18%
Mean number of years		4.7	2.8	4.2	6.7	2.5	4.2	5.0	7.7	4.8	5.6	3.5	4.5	7.0	-	6.2	6.6	5.7	5.6	6.4	5.7
				a	ab			d	def		j			hjk		j	hjk	j	j		j
Standard deviation		4.49	2.53	3.20	5.73	2.18	3.69	3.99	6.39	4.63	5.09	3.12	4.20	5.80	-	5.82	5.96	5.55	5.52	6.08	5.55
Standard error		.31	.39	.44	.53	.40	.45	.50	.89	.39	.44	.36	.49	.74	-	.72	.76	.61	.67	1.52	.61

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 32

## A11. Approximately how long have you been using your (ISDN2/2e/ ISDN30) services? (SINGLE CODE)

Base : Those who (mostly) use ISN2/2e or ISDN30

		MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
			a	b	*c	d	e	f	g	h	i	j	k	l	*m	n	o	p	q
Significance Level: 95%																			
Unweighted total		217	123	94	-	88	53	83	54	52	33	160	57	140	20	98	119	74	136
Effective Weighted Sample		165	83	91	-	60	37	80	53	44	29	127	39	115	14	78	87	51	123
Total		209	124	85	-	82	57	73	49	47	28	153	56	130	22	100	109	86	117
			59%	41%	-%	39%	27%	35%	23%	23%	13%	73%	27%	62%	11%	48%	52%	41%	56%
Less than 6 months	(0.4)	2	1	1	-	1	-	-	1	1	-	2	-	2	-	1	1	1	1
		1%	1%	1%	-%	2%	-%	-%	2%	2%	-%	2%	-%	2%	-%	1%	1%	2%	1%
			58%	42%	-%	58%	-%	-%	42%	42%	-%	100%	-%	100%	-%	58%	42%	58%	42%
6 to 12 months	(0.8)	13	10	3	-	10	-	3	2	4	-	12	1	12	-	9	4	9	3
		6%	8%	4%	-%	12%	-%	5%	4%	9%	-%	8%	2%	9%	-%	9%	3%	10%	3%
						e												q	
12 to 18 months	(1.3)	21	16	5	-	4	12	6	3	7	1	17	5	14	2	16	5	14	7
		10%	13%	6%	-%	5%	21%	8%	5%	15%	5%	11%	9%	11%	10%	16%	5%	16%	6%
						dfg										o			
18 to 24 months	(1.8)	41	17	24	-	11	8	14	13	5	6	30	10	26	5	29	12	23	18
		19%	14%	28%	-%	13%	14%	19%	27%	10%	21%	20%	19%	20%	20%	29%	11%	27%	15%
				a					h							o			
2 to 5 years	(3.5)	73	50	24	-	32	23	21	13	12	12	46	28	36	10	29	44	30	41
		35%	40%	28%	-%	39%	41%	29%	27%	24%	44%	30%	50%	27%	45%	29%	41%	35%	35%
													j						
6 to 10 years	(8.0)	34	16	18	-	14	6	18	10	9	6	27	7	26	2	11	23	3	31
		16%	13%	21%	-%	17%	11%	25%	20%	20%	21%	18%	12%	20%	7%	11%	22%	4%	26%
																		p	
10 to 15 years	(12.4)	12	8	4	-	5	6	4	3	2	2	10	2	6	4	3	9	5	7
		6%	6%	5%	-%	6%	10%	6%	6%	4%	9%	6%	4%	5%	16%	3%	8%	5%	6%
			64%	36%	-%	39%	47%	36%	27%	16%	21%	83%	17%	53%	30%	24%	76%	40%	60%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 32

## A11. Approximately how long have you been using your (ISDN2/2e/ ISDN30) services? (SINGLE CODE)

Base : Those who (mostly) use ISN2/2e or ISDN30

		MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
Significance Level: 95%			a	b	*c	d	e	f	g	h	i	j	k	l	*m	n	o	p	q
Unweighted total		217	123	94	-	88	53	83	54	52	33	160	57	140	20	98	119	74	136
Effective Weighted Sample		165	83	91	-	60	37	80	53	44	29	127	39	115	14	78	87	51	123
Total		209	124	85	-	82	57	73	49	47	28	153	56	130	22	100	109	86	117
			59%	41%	-%	39%	27%	35%	23%	23%	13%	73%	27%	62%	11%	48%	52%	41%	56%
16 to 20 years	(18.0)	7	2	4	-	2	1	3	3	4	-	5	1	5	-	2	5	1	6
		3%	2%	5%	-%	3%	1%	4%	6%	8%	-%	3%	3%	4%	-%	2%	5%	1%	5%
			37%	63%	-%	37%	12%	40%	48%	58%	-%	78%	22%	78%	-%	24%	76%	16%	84%
Over 20 years	(22.0)	3	2	1	-	2	1	2	1	3	-	3	-	3	-	-	3	-	3
		2%	2%	1%	-%	3%	1%	3%	2%	7%	-%	2%	-%	2%	-%	-%	3%	-%	3%
			75%	25%	-%	75%	25%	75%	25%	100%	-%	100%	-%	100%	-%	-%	100%	-%	100%
Don't know		2	1	1	-	1	*	1	-	*	-	1	2	*	*	-	2	*	-
		1%	1%	1%	-%	1%	1%	2%	-%	1%	-%	1%	3%	*%	2%	-%	2%	*%	-%
			53%	47%	-%	35%	18%	47%	-%	18%	-%	35%	65%	18%	18%	-%	100%	18%	-%
Mean number of years		4.7	4.5	5.0	-	5.0	4.6	5.6	5.4	6.3	4.7	4.9	4.2	4.9	4.7	3.3	6.1	3.2	5.9
																n	p		
Standard deviation		4.49	4.39	4.63	-	4.88	4.29	5.08	5.16	6.49	3.31	4.80	3.46	4.95	3.83	3.20	5.09	3.21	4.99
Standard error		.31	.40	.48	-	.53	.59	.56	.70	.91	.58	.38	.47	.42	.88	.32	.47	.38	.43
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																			

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 32

## A11. Approximately how long have you been using your (ISDN2/2e/ ISDN30) services? (SINGLE CODE)

Base : Those who (mostly) use ISN2/2e or ISDN30

		SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
		NEVER							UP TO 3 YEARS	4+ YEARS			SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK	
		LAST YEAR	EVER	/DK	YES	NO	YES	NO/DK			YES	NO/DK								
		a	b	c	d	e	f	g	h	i	j	*k	l	m	n	o	p	q	*r	
Significance Level: 95%																				
Unweighted total		217	34	128	55	138	55	99	33	156	51	110	22	44	59	45	34	50	62	23
Effective Weighted Sample		165	25	107	37	107	39	72	25	121	41	81	15	36	55	40	28	45	53	20
Total		209	33	119	57	131	53	95	39	151	45	111	22	40	50	38	33	42	55	20
			16%	57%	27%	63%	25%	45%	19%	72%	21%	53%	11%	19%	24%	18%	16%	20%	26%	9%
Less than 6 months	(0.4)	2	2	-	-	2	-	1	-	2	-	1	-	-	1	1	1	-	1	-
		1%	7%	-%	-%	2%	-%	1%	-%	2%	-%	1%	-%	-%	2%	3%	3%	-%	2%	-%
			b																	
			100%	-%	-%	100%	-%	58%	-%	100%	-%	58%	-%	-%	42%	42%	42%	-%	42%	-%
6 to 12 months	(0.8)	13	9	4	-	11	1	7	1	12	1	9	-	2	4	2	3	1	3	1
		6%	28%	3%	-%	8%	3%	8%	4%	8%	2%	8%	-%	4%	9%	4%	11%	2%	6%	4%
			bc																	
			71%	29%	-%	81%	11%	56%	11%	94%	6%	67%	-%	12%	33%	12%	27%	6%	27%	6%
12 to 18 months	(1.3)	21	2	14	5	14	5	7	6	18	3	10	3	8	1	4	8	*	8	1
		10%	7%	12%	8%	11%	10%	8%	15%	12%	6%	9%	13%	20%	2%	10%	25%	1%	14%	4%
														m			p			
			11%	67%	22%	67%	26%	33%	27%	82%	12%	46%	14%	38%	4%	17%	38%	2%	36%	4%
18 to 24 months	(1.8)	41	4	29	8	27	10	25	5	31	6	26	4	4	8	6	7	4	5	6
		19%	11%	24%	14%	20%	18%	26%	13%	21%	14%	23%	19%	9%	15%	16%	22%	9%	9%	31%
			9%	71%	20%	65%	24%	61%	12%	77%	15%	63%	11%	9%	19%	15%	18%	9%	12%	15%
2 to 5 years	(3.5)	73	1	40	32	38	23	29	21	48	18	42	8	8	14	12	7	16	14	9
		35%	4%	34%	56%	29%	44%	30%	54%	32%	41%	38%	36%	19%	29%	30%	22%	39%	26%	48%
			a						f											
			2%	55%	44%	52%	32%	39%	29%	65%	25%	57%	11%	10%	19%	16%	10%	22%	19%	13%
6 to 10 years	(8.0)	34	6	20	7	21	9	16	3	24	10	15	4	11	13	8	3	12	15	-
		16%	19%	17%	13%	16%	16%	17%	8%	16%	22%	14%	16%	27%	26%	21%	9%	29%	27%	-%
																	o			
			18%	60%	22%	63%	25%	47%	9%	72%	28%	45%	10%	31%	38%	23%	8%	36%	45%	-%
10 to 15 years	(12.4)	12	3	8	*	10	2	7	1	10	2	7	1	3	4	-	1	3	4	*
		6%	10%	7%	1%	7%	4%	7%	2%	6%	4%	6%	4%	8%	9%	-%	2%	8%	7%	2%
			27%	69%	4%	83%	17%	57%	7%	83%	17%	57%	7%	26%	36%	-%	7%	29%	33%	4%
Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																				

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 32

A11. Approximately how long have you been using your (ISDN2/2e/ ISDN30) services? (SINGLE CODE)

Base : Those who (mostly) use ISN2/2e or ISDN30

		SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
		Total	NEVER			YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
			LAST YEAR	EVER	/DK															
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	*k	l	m	n	o	p	q	*r	
Unweighted total		217	34	128	55	138	55	99	33	156	51	110	22	44	59	45	34	50	62	23
Effective Weighted Sample		165	25	107	37	107	39	72	25	121	41	81	15	36	55	40	28	45	53	20
Total		209	33	119	57	131	53	95	39	151	45	111	22	40	50	38	33	42	55	20
			16%	57%	27%	63%	25%	45%	19%	72%	21%	53%	11%	19%	24%	18%	16%	20%	26%	9%
16 to 20 years	(18.0)	7	3	2	1	5	1	2	*	3	3	2	1	3	2	3	2	2	3	1
		3%	8%	2%	3%	4%	3%	2%	1%	2%	8%	1%	5%	7%	5%	8%	6%	5%	5%	5%
			42%	36%	22%	78%	22%	36%	6%	48%	52%	24%	18%	42%	34%	46%	28%	30%	42%	16%
Over 20 years	(22.0)	3	2	1	1	2	-	-	-	2	2	-	-	2	2	3	-	3	2	1
		2%	5%	1%	1%	2%	-%	-%	-%	1%	4%	-%	-%	6%	5%	8%	-%	8%	4%	4%
			50%	25%	25%	75%	-%	-%	-%	50%	50%	-%	-%	75%	75%	100%	-%	100%	75%	25%
Don't know		2	*	-	2	1	1	*	2	*	-	*	2	-	-	-	-	-	-	*
		1%	1%	-%	3%	1%	2%	*%	4%	*%	-%	*%	7%	-%	-%	-%	-%	-%	-%	2%
			18%	-%	82%	35%	47%	18%	65%	18%	-%	18%	65%	-%	-%	-%	-%	-%	-%	18%
Mean number of years		4.7	6.0	4.5	4.4	4.9	4.4	4.4	3.5	4.4	6.2	4.0	4.8	6.8	6.4	6.4	3.6	7.4	6.2	4.5
										h								o		
Standard deviation		4.49	6.69	4.01	3.77	4.88	3.62	3.95	2.71	4.21	5.52	3.51	4.40	6.20	5.63	6.60	4.37	5.84	5.59	5.38
Standard error		.31	1.16	.35	.52	.42	.49	.40	.49	.34	.77	.34	.98	.93	.73	.98	.75	.83	.71	1.15

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 33

## A12A. Do you consider ISDN2/2e to be... (SINGLE CODE)

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP SWITCHED	IP NOT SWITCHED	ANY
					£1M	£1M-£20M	£21M-£100M	£100M										ISDN	ISDN	
Significance Level: 95%		*a	b	c	*d	e	f	g	h	i	j	*k	l	*m	n	o	p	q	*r	s
Unweighted total	141	23	32	86	19	39	43	37	141	61	80	-	61	-	67	43	67	53	12	67
Effective Weighted Sample	98	19	31	79	13	28	37	32	98	60	49	-	60	-	55	42	55	44	10	55
Total	139	46	40	53	29	43	35	28	139	52	87	-	52	-	57	37	57	47	9	57
		33%	29%	38%	21%	31%	25%	20%	100%	37%	63%	-%	37%	-%	41%	27%	41%	33%	7%	41%
A primary service	82	24	21	37	13	22	23	22	82	33	49	-	33	-	37	24	37	29	8	37
	59%	52%	53%	71%	44%	51%	66%	79%	59%	64%	57%	-%	64%	-%	64%	66%	64%	62%	83%	64%
								e												
		29%	26%	45%	15%	27%	28%	26%	100%	40%	60%	-%	40%	-%	45%	30%	45%	35%	9%	45%
A supplementary service used in addition to your main one	45	18	18	9	16	13	10	4	45	15	30	-	15	-	18	10	18	15	2	18
	32%	38%	44%	18%	55%	30%	30%	15%	32%	29%	34%	-%	29%	-%	31%	28%	31%	32%	17%	31%
			c																	
		40%	40%	21%	35%	29%	23%	9%	100%	33%	67%	-%	33%	-%	40%	23%	40%	34%	4%	40%
A back-up system in case your main system fails	9	1	1	6	*	5	2	2	9	4	5	-	4	-	3	2	3	3	-	3
	6%	3%	3%	11%	1%	12%	5%	6%	6%	8%	6%	-%	8%	-%	5%	6%	5%	6%	-%	5%
		16%	16%	68%	5%	59%	18%	18%	100%	45%	55%	-%	45%	-%	32%	27%	32%	32%	-%	32%
Other	3	3	-	-	-	3	-	-	3	-	3	-	-	-	-	-	-	-	-	-
	2%	7%	-%	-%	-%	7%	-%	-%	2%	-%	4%	-%	-%	-%	-%	-%	-%	-%	-%	-%
		100%	-%	-%	-%	100%	-%	-%	100%	-%	100%	-%	-%	-%	-%	-%	-%	-%	-%	-%
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																				



# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 33**

**A12A. Do you consider ISDN2/2e to be... (SINGLE CODE)**

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	*b	*c	d	e	f	*g	h	*i								
Significance Level: 95%											j	k	l	*m	n	o	p	q
Unweighted total	141	123	18	-	88	53	33	28	42	25	105	36	94	11	58	83	43	94
Effective Weighted Sample	98	83	18	-	60	37	32	28	34	21	77	22	72	7	42	56	27	81
Total	139	124	16	-	82	57	28	24	38	20	103	37	88	15	62	77	57	80
		89%	11%	-%	59%	41%	20%	17%	27%	14%	74%	26%	63%	11%	45%	55%	41%	57%
A primary service	82	76	7	-	82	-	21	12	25	12	63	20	57	6	34	48	31	51
	59%	61%	44%	-%	100%	-%	77%	49%	67%	59%	61%	55%	65%	38%	55%	62%	54%	64%
		92%	8%	-%	100%	-%	26%	14%	31%	14%	76%	24%	69%	7%	42%	58%	37%	62%
A supplementary service used in addition to your main one	45	38	6	-	-	45	7	8	10	8	29	16	23	6	24	21	21	22
	32%	31%	41%	-%	-%	79%	23%	35%	25%	41%	28%	44%	26%	38%	38%	27%	36%	28%
		86%	14%	-%	-%	100%	15%	19%	21%	18%	64%	36%	51%	13%	53%	47%	46%	50%
A back-up system in case your main system fails	9	6	2	-	-	9	-	4	3	-	8	*	8	*	4	5	2	7
	6%	5%	15%	-%	-%	16%	-%	16%	7%	-%	8%	1%	9%	3%	6%	6%	4%	8%
		73%	27%	-%	-%	100%	-%	45%	32%	-%	95%	5%	91%	5%	43%	57%	25%	75%
Other	3	3	-	-	-	3	-	-	-	-	3	-	-	3	-	3	3	-
	2%	3%	-%	-%	-%	6%	-%	-%	-%	-%	3%	-%	-%	21%	-%	4%	5%	-%
		100%	-%	-%	-%	100%	-%	-%	-%	-%	100%	-%	-%	100%	-%	100%	100%	-%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 33**

## **A12A. Do you consider ISDN2/2e to be... (SINGLE CODE)**

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
								UP TO							UP TO	OVER			
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	2 YEARS	2 YEARS	YES	NO/DK
Significance Level: 95%	*a	b	c	d	e	f	*g	h	i	j	*k	l	m	n	*o	p	q	*r	
Unweighted total	141	27	81	33	93	33	55	19	104	30	63	11	37	45	37	22	44	50	17
Effective Weighted Sample	98	19	63	19	67	20	35	13	74	21	42	6	29	41	33	16	39	41	14
Total	139	27	76	37	91	33	56	25	103	26	69	13	33	36	30	21	36	43	14
		19%	54%	26%	65%	23%	41%	18%	74%	19%	50%	9%	24%	26%	21%	15%	26%	31%	10%
A primary service	82	24	35	23	52	26	35	10	63	16	39	7	19	25	21	9	27	27	10
	59%	89%	47%	64%	58%	79%	63%	40%	61%	63%	56%	53%	59%	71%	69%	44%	76%	62%	73%
		29%	43%	28%	63%	31%	43%	12%	76%	20%	47%	8%	24%	31%	25%	11%	33%	32%	12%
A supplementary service used in addition to your main one	45	3	31	11	28	7	12	15	32	7	21	6	11	9	7	10	7	14	3
	32%	11%	41%	29%	31%	21%	21%	60%	31%	27%	30%	47%	34%	25%	24%	50%	20%	33%	24%
		7%	70%	23%	63%	16%	27%	34%	72%	16%	47%	13%	25%	20%	16%	23%	16%	32%	8%
A back-up system in case your main system fails	9	-	6	3	7	-	6	-	5	2	6	-	2	2	2	1	2	2	*
	6%	-%	8%	8%	8%	-%	11%	-%	5%	9%	9%	-%	7%	4%	7%	6%	4%	5%	3%
		-%	68%	32%	84%	-%	68%	-%	57%	27%	68%	-%	27%	18%	23%	14%	18%	27%	5%
Other	3	-	3	-	3	-	3	-	3	-	3	-	-	-	-	-	-	-	-
	2%	-%	4%	-%	3%	-%	6%	-%	3%	-%	5%	-%	-%	-%	-%	-%	-%	-%	-%
		-%	100%	-%	100%	-%	100%	-%	100%	-%	100%	-%	-%	-%	-%	-%	-%	-%	-%
Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																			

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 34**

## **A12B. Do you consider ISDN30 to be... (SINGLE CODE)**

Base : Those who use ISN30 (and mostly use an ISDN service)

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											ANY IP
	Total	1-49	50-249	250+	UNDER £1M	£1M-£20M	£21M-£100M	OVER £100M	ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP SWITCHED ISDN	IP NOT SWITCHED ISDN	
Significance Level: 95%		*a	b	c	*d	e	f	g	h	i	*j	k	l	*m	n	o	p	q	*r	s
Unweighted total	137	25	32	79	16	37	45	37	61	137	-	76	61	-	43	61	61	52	8	61
Effective Weighted Sample	133	25	32	79	16	36	44	36	60	133	-	74	60	-	42	60	60	51	8	60
Total	122	26	33	62	16	35	41	29	52	122	-	70	52	-	37	54	54	47	7	54
		22%	27%	51%	13%	29%	33%	24%	43%	100%	-%	57%	43%	-%	30%	45%	45%	38%	6%	45%
A primary service	73	16	19	39	6	16	29	21	28	73	-	45	28	-	20	35	35	28	7	35
	60%	60%	56%	62%	39%	46%	70%	72%	54%	60%	-%	65%	54%	-%	55%	64%	64%	60%	100%	64%
		22%	25%	53%	8%	22%	39%	28%	38%	100%	-%	62%	38%	-%	28%	48%	48%	39%	9%	48%
A supplementary service used in addition to your main one	42	11	13	18	9	18	10	6	21	42	-	21	21	-	14	17	17	16	-	17
	35%	40%	41%	29%	55%	50%	26%	19%	40%	35%	-%	30%	40%	-%	38%	32%	32%	35%	-%	32%
		25%	32%	43%	21%	42%	25%	13%	50%	100%	-%	50%	50%	-%	34%	41%	41%	38%	-%	41%
A back-up system in case your main system fails	7	-	1	6	1	2	2	2	3	7	-	3	3	-	2	2	2	2	-	2
	5%	-%	3%	9%	7%	4%	4%	8%	6%	5%	-%	5%	6%	-%	6%	4%	4%	5%	-%	4%
		-%	16%	84%	16%	24%	24%	36%	48%	100%	-%	52%	48%	-%	36%	36%	36%	36%	-%	36%

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 34

## A12B. Do you consider ISDN30 to be... (SINGLE CODE)

Base : Those who use ISN30 (and mostly use an ISDN service)

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	b	*c	d	*e	f	g	h	*i	j	k	l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	137	43	94	-	40	21	83	54	40	21	105	32	94	11	66	71	40	94
Effective Weighted Sample	133	42	91	-	40	21	80	53	39	21	103	30	92	11	64	70	38	93
Total	122	36	85	-	33	19	73	49	36	19	93	29	84	9	60	61	38	81
		30%	70%	-%	27%	15%	60%	40%	29%	15%	76%	24%	69%	8%	50%	50%	31%	66%
A primary service	73	20	53	-	21	7	73	-	25	10	60	13	55	5	32	41	20	51
	60%	55%	62%	-%	65%	35%	100%	-%	71%	51%	64%	47%	66%	51%	53%	66%	52%	64%
		27%	73%	-%	g 29%	9%	dgh 100%	-%	g 35%	13%	82%	18%	75%	6%	44%	56%	27%	70%
A supplementary service used in addition to your main one	42	15	27	-	11	10	-	42	8	9	28	14	23	4	25	17	18	23
	35%	41%	32%	-%	33%	53%	-%	87%	23%	49%	30%	50%	28%	49%	42%	27%	46%	29%
		36%	64%	-%	f 26%	24%	-%	dff 100%	f 19%	22%	66%	j 34%	55%	11%	60%	40%	42%	56%
A back-up system in case your main system fails	7	2	5	-	1	2	-	7	2	-	6	1	6	-	3	4	1	6
	5%	4%	6%	-%	2%	13%	-%	13%	7%	-%	6%	4%	7%	-%	4%	6%	2%	7%
		24%	76%	-%	f 12%	f 36%	-%	f 100%	f 36%	-%	84%	16%	84%	-%	40%	60%	12%	88%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 34**

## **A12B. Do you consider ISDN30 to be... (SINGLE CODE)**

Base : Those who use ISN30 (and mostly use an ISDN service)

	SWITCHING ISDN SUPPLIER				CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO		YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
									3 YEARS	4+ YEARS									
Significance Level: 95%		*a	b	*c	d	*e	f	*g	h	i	j	*k	l	m	n	*o	p	q	*r
Unweighted total	137	26	83	28	95	29	59	17	102	32	64	12	34	47	31	25	36	48	13
Effective Weighted Sample	133	26	80	27	92	28	57	17	99	31	62	12	33	46	30	25	35	47	13
Total	122	22	74	25	83	26	51	16	91	28	56	11	30	42	27	23	31	43	12
		18%	61%	21%	68%	21%	42%	13%	74%	23%	46%	9%	25%	34%	22%	19%	26%	35%	10%
A primary service	73	13	41	19	51	15	30	9	57	13	30	8	19	28	17	12	23	28	7
	60%	57%	55%	77%	61%	56%	58%	53%	62%	48%	53%	76%	63%	68%	61%	52%	73%	66%	58%
		17%	56%	27%	69%	20%	40%	12%	77%	18%	41%	11%	26%	39%	23%	16%	31%	39%	9%
A supplementary service used in addition to your main one	42	7	29	6	28	10	17	8	31	11	23	2	9	12	9	10	8	12	5
	35%	33%	39%	23%	33%	37%	34%	47%	34%	40%	41%	17%	29%	29%	33%	41%	24%	29%	42%
		17%	69%	14%	66%	23%	41%	18%	73%	27%	55%	4%	21%	28%	21%	23%	18%	29%	12%
A back-up system in case your main system fails	7	2	4	-	5	2	4	-	3	3	3	1	2	2	2	2	1	2	-
	5%	11%	6%	-%	6%	7%	8%	-%	3%	12%	6%	7%	8%	4%	6%	7%	3%	6%	-%
		36%	64%	-%	72%	28%	64%	-%	48%	52%	52%	12%	36%	24%	24%	24%	12%	36%	-%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 35

B3AA. Overall, what do you regard as the main functional value(s) of ISDN2/2e for your organisation? (MULTI CODE)

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											IP SWITCHED		IP NOT SWITCHED		ANY IP
	Total	1-49 *a	50-249 b	250+ c	UNDER				ISDN2 h	ISDN30 i	ISDN2 ONLY j	ISDN30 ONLY *k	BOTH ISDN l	IP NOT ISDN *m	ISDN2 & IP n	ISDN30 & IP o	ISDN & IP p	ISDN q	ISDN *r					
					£1M £20M *d	£1M-£20M e	£21M-£100M f	OVER £100M g																
Significance Level: 95%																								
Unweighted total	141	23	32	86	19	39	43	37	141	61	80	-	61	-	67	43	67	53	12	67				
Effective Weighted Sample	98	19	31	79	13	28	37	32	98	60	49	-	60	-	55	42	55	44	10	55				
Total	139	46	40	53	29	43	35	28	139	52	87	-	52	-	57	37	57	47	9	57				
		33%	29%	38%	21%	31%	25%	20%	100%	37%	63%	-%	37%	-%	41%	27%	41%	33%	7%	41%				
Reliable	85	25	29	31	16	24	22	19	85	32	53	-	32	-	38	24	38	28	9	38				
	61%	54%	72%	60%	55%	56%	62%	68%	61%	61%	61%	-%	61%	-%	66%	66%	66%	61%	96%	66%				
		29%	34%	37%	19%	29%	26%	22%	100%	38%	62%	-%	38%	-%	44%	29%	44%	33%	11%	44%				
Easy to use	79	30	21	29	18	25	19	17	79	28	51	-	28	-	37	24	37	30	6	37				
	57%	64%	52%	54%	61%	57%	54%	63%	57%	54%	58%	-%	54%	-%	64%	65%	64%	65%	64%	64%				
		38%	26%	36%	23%	31%	24%	22%	100%	36%	64%	-%	36%	-%	47%	30%	47%	38%	8%	47%				
Flexible line capacity	71	21	18	32	13	16	17	21	71	33	38	-	33	-	33	24	33	25	8	33				
	51%	46%	44%	61%	45%	36%	48%	77%	51%	63%	44%	-%	63%	-%	58%	66%	58%	55%	81%	58%				
		30%	25%	45%	19%	22%	24%	ef	30%	j	j	-%	j	-%	j	j	j							
Call management functionality	67	19	19	29	13	18	20	16	67	28	39	-	28	-	32	25	32	28	4	32				
	48%	42%	47%	55%	44%	42%	56%	57%	48%	54%	44%	-%	54%	-%	56%	68%	56%	61%	44%	56%				
		29%	28%	43%	19%	27%	29%	23%	100%	42%	58%	-%	42%	-%	48%	38%	48%	42%	6%	48%				
Data connectivity	57	16	18	22	12	11	17	14	57	25	32	-	25	-	34	22	34	28	6	34				
	41%	35%	46%	43%	41%	25%	48%	52%	41%	48%	37%	-%	48%	-%	60%	60%	60%	61%	59%	60%				
		28%	32%	39%	21%	19%	29%	e	100%	44%	56%	-%	44%	-%	hj	hj	hj	hj	hj	hj				
Requires little post purchase support	48	15	10	22	11	12	13	11	48	22	26	-	22	-	26	17	26	20	4	26				
	34%	33%	25%	42%	37%	28%	38%	39%	34%	42%	29%	-%	42%	-%	45%	45%	45%	44%	44%	45%				
		32%	21%	47%	23%	26%	28%	23%	100%	46%	54%	-%	46%	-%	54%	35%	54%	43%	9%	54%				
Voice connectivity	47	8	14	25	6	14	15	13	47	24	23	-	24	-	23	17	23	18	5	23				
	34%	18%	34%	48%	21%	32%	42%	48%	34%	46%	27%	-%	46%	-%	40%	47%	40%	38%	53%	40%				
		18%	29%	53%	13%	29%	31%	28%	100%	j	49%	-%	j	-%	49%	j	49%	38%	10%	49%				
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																								

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 35

**B3AA. Overall, what do you regard as the main functional value(s) of ISDN2/2e for your organisation? (MULTI CODE)**

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											
	Total	1-49 *a	50-249 b	250+ c	UNDER				ISDN2 h	ISDN30 i	ISDN2 ONLY j	ISDN30 ONLY *k	BOTH ISDN l	IP NOT ISDN *m	ISDN2 & IP n	ISDN30 & IP o	ISDN & IP p	IP SWITCHED	IP NOT SWITCHED	ANY IP s
					£1M *d	£1M- £20M e	£21M-£100M f	OVER £100M g										ISDN	ISDN	
Significance Level: 95%																				
Unweighted total	141	23	32	86	19	39	43	37	141	61	80	-	61	-	67	43	67	53	12	67
Effective Weighted Sample	98	19	31	79	13	28	37	32	98	60	49	-	60	-	55	42	55	44	10	55
Total	139	46	40	53	29	43	35	28	139	52	87	-	52	-	57	37	57	47	9	57
		33%	29%	38%	21%	31%	25%	20%	100%	37%	63%	-%	37%	-%	41%	27%	41%	33%	7%	41%
Provides voice & data communications via the same service	45	7	16	22	5	13	16	11	45	23	22	-	23	-	22	18	22	19	3	22
	33%	15%	40%	43%	16%	31%	45%	40%	33%	44%	26%	-%	44%	-%	38%	49%	38%	41%	29%	38%
		16%	35%	49%	10%	30%	35%	25%	100%	j 51%	49%	-%	j 51%	-%	48%	j 40%	48%	42%	6%	48%
LAN connectivity	39	8	15	16	6	10	13	10	39	20	20	-	20	-	23	17	23	18	5	23
	28%	18%	37%	30%	19%	23%	38%	37%	28%	38%	22%	-%	38%	-%	40%	46%	40%	38%	49%	40%
		21%	38%	41%	14%	26%	34%	26%	100%	50%	50%	-%	50%	-%	58%	hj 43%	58%	45%	12%	58%
CTI capability (Computer Telephony Integration)	16	6	3	7	5	3	4	5	16	9	8	-	9	-	11	9	11	9	2	11
	12%	12%	9%	14%	16%	6%	10%	19%	12%	17%	9%	-%	17%	-%	20%	24%	20%	19%	26%	20%
		35%	21%	44%	29%	17%	22%	32%	100%	53%	47%	-%	53%	-%	70%	j 53%	70%	55%	15%	70%
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																				

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 35

B3AA. Overall, what do you regard as the main functional value(s) of ISDN2/2e for your organisation? (MULTI CODE)

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	*b	*c	d	e	f	*g	h	*i	j	k	l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	141	123	18	-	88	53	33	28	42	25	105	36	94	11	58	83	43	94
Effective Weighted Sample	98	83	18	-	60	37	32	28	34	21	77	22	72	7	42	56	27	81
Total	139	124	16	-	82	57	28	24	38	20	103	37	88	15	62	77	57	80
		89%	11%	-%	59%	41%	20%	17%	27%	14%	74%	26%	63%	11%	45%	55%	41%	57%
Reliable	85	75	10	-	54	31	20	12	24	14	56	29	53	3	35	50	31	54
	61%	60%	67%	-%	66%	54%	71%	50%	64%	68%	55%	79%	60%	21%	56%	65%	54%	68%
		88%	12%	-%	64%	36%	23%	14%	28%	16%	66%	34%	63%	4%	41%	59%	36%	63%
Easy to use	79	71	8	-	50	29	17	11	29	8	57	22	50	7	29	50	34	44
	57%	57%	52%	-%	61%	50%	61%	47%	76%	41%	56%	59%	57%	47%	47%	65%	59%	55%
		90%	10%	-%	64%	36%	22%	14%	36%	10%	73%	27%	64%	9%	37%	63%	42%	56%
Flexible line capacity	71	65	6	-	48	22	19	13	23	10	53	18	49	4	30	41	22	48
	51%	53%	38%	-%	59%	40%	69%	55%	62%	52%	51%	49%	56%	24%	49%	53%	40%	61%
		92%	8%	-%	68%	32%	27%	19%	33%	15%	75%	25%	70%	5%	43%	57%	32%	68%
Call management functionality	67	57	10	-	38	29	20	8	23	9	51	16	40	12	26	41	26	39
	48%	46%	67%	-%	46%	51%	73%	33%	62%	46%	50%	43%	45%	79%	41%	54%	46%	49%
		84%	16%	-%	57%	43%	30%	12%	35%	14%	76%	24%	59%	17%	38%	62%	39%	59%
Data connectivity	57	47	10	-	40	17	15	9	24	11	46	11	45	*	26	31	21	35
	41%	38%	62%	-%	48%	30%	55%	39%	63%	54%	44%	31%	51%	3%	41%	41%	36%	44%
		83%	17%	-%	70%	30%	27%	17%	42%	19%	80%	20%	80%	1%	45%	55%	36%	62%
Requires little post purchase support	48	42	6	-	30	18	14	8	21	4	38	10	32	6	20	27	19	27
	34%	34%	37%	-%	36%	32%	52%	31%	57%	22%	37%	27%	36%	42%	33%	36%	33%	34%
		88%	12%	-%	62%	38%	30%	16%	45%	9%	79%	21%	66%	13%	42%	58%	39%	58%
Voice connectivity	47	39	9	-	29	19	13	11	15	8	38	9	32	6	18	29	12	35
	34%	31%	55%	-%	35%	33%	45%	48%	40%	42%	37%	25%	37%	42%	30%	38%	21%	44%
		82%	18%	-%	61%	39%	27%	24%	31%	18%	81%	19%	68%	13%	39%	61%	25%	74%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		



# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 35

B3AA. Overall, what do you regard as the main functional value(s) of ISDN2/2e for your organisation? (MULTI CODE)

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	*b	*c	d	e	f	*g	h	*i	j	k	l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	141	123	18	-	88	53	33	28	42	25	105	36	94	11	58	83	43	94
Effective Weighted Sample	98	83	18	-	60	37	32	28	34	21	77	22	72	7	42	56	27	81
Total	139	124	16	-	82	57	28	24	38	20	103	37	88	15	62	77	57	80
		89%	11%	-%	59%	41%	20%	17%	27%	14%	74%	26%	63%	11%	45%	55%	41%	57%
Provides voice & data communications via the same service	45	37	8	-	25	21	14	9	16	6	37	8	35	2	18	28	9	37
	33%	30%	52%	-%	30%	36%	49%	38%	42%	31%	36%	23%	40%	12%	29%	36%	15%	46%
		82%	18%	-%	55%	45%	30%	20%	35%	14%	82%	18%	78%	4%	39%	61%	19%	81%
LAN connectivity	39	31	8	-	23	16	12	8	18	5	31	8	30	1	16	23	10	27
	28%	25%	51%	-%	28%	29%	43%	31%	47%	26%	30%	22%	34%	10%	26%	30%	18%	34%
		79%	21%	-%	58%	42%	31%	19%	45%	13%	80%	20%	76%	4%	41%	59%	26%	70%
CTI capability (Computer Telephony Integration)	16	14	3	-	10	6	6	3	9	2	12	4	12	-	4	12	5	11
	12%	11%	17%	-%	13%	10%	21%	11%	24%	11%	12%	11%	14%	-%	6%	16%	10%	14%
		84%	16%	-%	64%	36%	37%	17%	56%	13%	76%	24%	76%	-%	23%	77%	33%	67%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 35**

**B3AA. Overall, what do you regard as the main functional value(s) of ISDN2/2e for your organisation? (MULTI CODE)**

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
	Total	NEVER			YES	NO	YES	NO/DK	UP TO		YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
		LAST YEAR	EVER	/DK					3 YEARS	4+ YEARS									
Significance Level: 95%		*a	b	c	d	e	f	*g	h	i	j	*k	l	m	n	*o	p	q	*r
Unweighted total	141	27	81	33	93	33	55	19	104	30	63	11	37	45	37	22	44	50	17
Effective Weighted Sample	98	19	63	19	67	20	35	13	74	21	42	6	29	41	33	16	39	41	14
Total	139	27	76	37	91	33	56	25	103	26	69	13	33	36	30	21	36	43	14
		19%	54%	26%	65%	23%	41%	18%	74%	19%	50%	9%	24%	26%	21%	15%	26%	31%	10%
Reliable	85	17	39	29	50	26	32	15	57	21	41	6	22	27	20	11	26	26	11
	61%	62%	52%	80%	55%	79%	57%	59%	55%	80%	60%	46%	67%	74%	67%	55%	71%	61%	81%
		19%	46%	35%	59%	30%	38%	17%	67%	24%	49%	7%	26%	31%	24%	13%	31%	31%	13%
Easy to use	79	15	34	30	48	22	23	19	54	17	31	11	24	23	21	14	22	30	7
	57%	55%	45%	82%	53%	68%	41%	75%	52%	66%	45%	86%	71%	63%	70%	67%	62%	69%	48%
		19%	43%	38%	60%	28%	29%	24%	68%	21%	40%	14%	30%	29%	27%	18%	28%	38%	9%
Flexible line capacity	71	19	30	22	49	14	25	12	51	15	31	6	21	23	19	12	21	25	9
	51%	70%	40%	60%	53%	43%	44%	49%	49%	58%	45%	50%	63%	63%	64%	58%	58%	57%	61%
		27%	43%	31%	68%	20%	35%	17%	72%	21%	44%	9%	29%	32%	27%	17%	30%	35%	12%
Call management functionality	67	15	37	16	40	15	18	16	48	13	25	9	21	23	20	11	22	25	8
	48%	55%	48%	43%	44%	47%	32%	65%	47%	49%	37%	74%	64%	64%	67%	51%	60%	57%	54%
		22%	55%	23%	60%	23%	27%	25%	72%	19%	38%	14%	31%	34%	30%	16%	33%	37%	11%
Data connectivity	57	15	31	10	40	11	17	5	47	8	22	1	22	20	22	14	20	26	8
	41%	57%	42%	27%	44%	33%	31%	20%	45%	31%	31%	7%	68%	56%	73%	70%	54%	61%	58%
		27%	55%	18%	71%	19%	31%	9%	82%	14%	38%	1%	39%	35%	38%	25%	35%	46%	14%
Requires little post purchase support	48	12	23	13	33	12	13	9	39	8	19	3	16	15	17	10	15	19	7
	34%	43%	30%	36%	36%	36%	23%	35%	38%	31%	27%	25%	48%	41%	55%	50%	42%	44%	49%
		25%	48%	27%	69%	24%	27%	19%	82%	17%	39%	7%	33%	31%	35%	22%	32%	40%	14%
Voice connectivity	47	8	31	8	35	10	19	5	38	9	23	1	13	18	15	7	16	16	7
	34%	30%	41%	22%	39%	30%	33%	21%	36%	36%	34%	7%	39%	51%	51%	32%	45%	37%	51%
		17%	66%	17%	74%	21%	40%	11%	79%	20%	49%	2%	27%	39%	32%	14%	34%	34%	15%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 35

B3AA. Overall, what do you regard as the main functional value(s) of ISDN2/2e for your organisation? (MULTI CODE)

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
								UP TO							UP TO				
	LAST YEAR	EVER	NEVER	YES	NO	YES	NO/DK	3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	2 YEARS	OVER 2 YEARS	YES	NO/DK	
Significance Level: 95%	Total	*a	b	c	d	e	f	*g	h	i	j	*k	l	m	n	*o	p	q	*r
Unweighted total	141	27	81	33	93	33	55	19	104	30	63	11	37	45	37	22	44	50	17
Effective Weighted Sample	98	19	63	19	67	20	35	13	74	21	42	6	29	41	33	16	39	41	14
Total	139	27	76	37	91	33	56	25	103	26	69	13	33	36	30	21	36	43	14
		19%	54%	26%	65%	23%	41%	18%	74%	19%	50%	9%	24%	26%	21%	15%	26%	31%	10%
Provides voice & data communications via the same service	45	9	26	10	35	8	19	4	38	7	23	1	16	18	14	5	17	18	4
	33%	34%	34%	28%	39%	25%	34%	16%	37%	27%	33%	7%	49%	49%	48%	25%	46%	41%	30%
		20%	57%	23%	77%	18%	43%	9%	84%	15%	50%	2%	35%	39%	32%	11%	37%	39%	9%
LAN connectivity	39	7	22	10	24	11	9	7	30	9	16	-	14	17	15	5	17	18	5
	28%	27%	30%	26%	26%	34%	16%	29%	29%	35%	24%	-%	41%	49%	49%	25%	47%	42%	34%
		18%	57%	24%	60%	28%	23%	19%	76%	23%	42%	-%	35%	45%	38%	13%	44%	46%	12%
CTI capability (Computer Telephony Integration)	16	5	4	7	8	6	2	3	10	6	5	-	8	6	10	4	7	8	3
	12%	18%	5%	20%	9%	19%	3%	12%	10%	24%	7%	-%	24%	18%	33%	20%	20%	18%	24%
		30%	25%	45%	49%	38%	11%	19%	62%	38%	30%	-%	49%	39%	61%	25%	45%	49%	21%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 36

**B3AB. What is the most important functional value of ISDN2/2e for your organisation? (SINGLE CODE)**

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											IP SWITCHED		IP NOT SWITCHED		ANY IP
	Total	UNDER			£1M	£1M-£20M	£21M-£100M		ISDN2	ISDN30				IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	ISDN	ISDN					
		1-49	50-249	250+			£100M	ONLY		ONLY	BOTH													
Significance Level: 95%		*a	b	c	*d	e	f	g	h	i	j	*k	l	*m	n	o	p	q	*r	s				
Unweighted total	141	23	32	86	19	39	43	37	141	61	80	-	61	-	67	43	67	53	12	67				
Effective Weighted Sample	98	19	31	79	13	28	37	32	98	60	49	-	60	-	55	42	55	44	10	55				
Total	139	46	40	53	29	43	35	28	139	52	87	-	52	-	57	37	57	47	9	57				
		33%	29%	38%	21%	31%	25%	20%	100%	37%	63%	-%	37%	-%	41%	27%	41%	33%	7%	41%				
Reliable	37	9	16	12	7	10	8	9	37	13	24	-	13	-	19	10	19	13	5	19				
	27%	20%	41%	23%	23%	23%	23%	33%	27%	25%	28%	-%	25%	-%	33%	28%	33%	29%	57%	33%				
		24%	44%	32%	18%	27%	21%	24%	100%	35%	65%	-%	35%	-%	51%	28%	51%	35%	14%	51%				
Flexible line capacity	28	5	6	18	4	5	9	10	28	21	7	-	21	-	17	15	17	14	3	17				
	20%	10%	15%	34%	13%	12%	27%	36%	20%	41%	8%	-%	41%	-%	29%	41%	29%	30%	29%	29%				
				b				e		hj		-%	hj		j	hj	j	j		j				
		16%	21%	63%	13%	18%	33%	35%	100%	75%	25%	-%	75%	-%	59%	53%	59%	50%	10%	59%				
Easy to use	28	14	6	8	8	9	7	4	28	7	21	-	7	-	11	5	11	10	*	11				
	20%	29%	16%	16%	26%	22%	20%	15%	20%	13%	25%	-%	13%	-%	19%	13%	19%	22%	4%	19%				
		48%	22%	30%	27%	33%	25%	15%	100%	24%	76%	-%	24%	-%	38%	18%	38%	37%	1%	38%				
Call management functionality	27	14	7	6	6	13	6	1	27	3	23	-	3	-	6	2	6	5	*	6				
	19%	29%	17%	12%	21%	29%	16%	5%	19%	6%	27%	-%	6%	-%	10%	4%	10%	11%	4%	10%				
						g			ilo		ilnops													
		51%	26%	23%	23%	48%	21%	5%	100%	12%	88%	-%	12%	-%	21%	6%	21%	20%	2%	21%				
Requires little post purchase support	8	3	2	2	3	2	2	1	8	3	5	-	3	-	1	1	1	-	-	1				
	6%	7%	6%	4%	11%	4%	6%	3%	6%	7%	5%	-%	7%	-%	2%	3%	2%	-%	-%	2%				
		39%	31%	30%	39%	23%	28%	10%	100%	43%	57%	-%	43%	-%	13%	13%	13%	-%	-%	13%				
Data connectivity	6	3	2	1	1	3	2	-	6	2	4	-	2	-	2	2	2	2	-	2				
	4%	5%	6%	2%	4%	6%	5%	-%	4%	4%	4%	-%	4%	-%	4%	6%	4%	5%	-%	4%				
		44%	42%	14%	19%	48%	32%	-%	100%	37%	63%	-%	37%	-%	37%	37%	37%	37%	-%	37%				
Provides voice & data communications via the same service	2	-	-	2	-	1	1	1	2	1	2	-	1	-	1	1	1	1	-	1				
	2%	-%	-%	5%	-%	2%	2%	3%	2%	2%	2%	-%	2%	-%	1%	2%	1%	2%	-%	1%				
		-%	-%	100%	-%	34%	32%	34%	100%	32%	68%	-%	32%	-%	32%	32%	32%	32%	-%	32%				
Voice connectivity	2	-	-	2	-	1	-	1	2	2	-	-	2	-	1	1	1	1	-	1				
	1%	-%	-%	3%	-%	2%	-%	3%	1%	3%	-%	-%	3%	-%	1%	2%	1%	2%	-%	1%				
		-%	-%	100%	-%	50%	-%	50%	100%	100%	-%	-%	100%	-%	50%	50%	50%	50%	-%	50%				
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																								

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 36

**B3AB. What is the most important functional value of ISDN2/2e for your organisation? (SINGLE CODE)**

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION												
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30		IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN	ISDN	IP SWITCHED	IP NOT SWITCHED	ANY
					£1M	£1M-£20M	£21M-£100M	OVER £100M				ONLY	BOTH								
Significance Level: 95%		*a	b	c	*d	e	f	g	h	i	j	*k	l	*m	n	o	p	q	*r	s	
Unweighted total	141	23	32	86	19	39	43	37	141	61	80	-	61	-	67	43	67	53	12	67	
Effective Weighted Sample	98	19	31	79	13	28	37	32	98	60	49	-	60	-	55	42	55	44	10	55	
Total	139	46	40	53	29	43	35	28	139	52	87	-	52	-	57	37	57	47	9	57	
		33%	29%	38%	21%	31%	25%	20%	100%	37%	63%	-%	37%	-%	41%	27%	41%	33%	7%	41%	
LAN connectivity	*	-	-	*	-	-	-	*	*	-	*	-	-	-	*	-	*	-	*	*	
	*%	-%	-%	1%	-%	-%	-%	2%	*%	-%	*%	-%	-%	-%	1%	-%	1%	-%	4%	1%	
		-%	-%	100%	-%	-%	-%	100%	100%	-%	100%	-%	-%	-%	100%	-%	100%	-%	100%	100%	
CTI capability (Computer Telephony Integration)	*	-	-	*	*	-	-	-	*	-	*	-	-	-	-	-	-	-	-	-	
	*%	-%	-%	1%	1%	-%	-%	-%	*%	-%	*%	-%	-%	-%	-%	-%	-%	-%	-%	-%	
		-%	-%	100%	100%	-%	-%	-%	100%	-%	100%	-%	-%	-%	-%	-%	-%	-%	-%	-%	

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 36**

**B3AB. What is the most important functional value of ISDN2/2e for your organisation? (SINGLE CODE)**

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	*b	*c	d	e	f	*g	h	*i	j	k	l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	141	123	18	-	88	53	33	28	42	25	105	36	94	11	58	83	43	94
Effective Weighted Sample	98	83	18	-	60	37	32	28	34	21	77	22	72	7	42	56	27	81
Total	139	124	16	-	82	57	28	24	38	20	103	37	88	15	62	77	57	80
		89%	11%	-%	59%	41%	20%	17%	27%	14%	74%	26%	63%	11%	45%	55%	41%	57%
Reliable	37	32	5	-	27	10	7	6	11	8	28	10	25	2	19	18	12	25
	27%	26%	33%	-%	33%	18%	24%	26%	29%	41%	27%	27%	29%	15%	31%	24%	21%	32%
		86%	14%	-%	72%	28%	18%	17%	30%	22%	74%	26%	68%	6%	51%	49%	31%	68%
Flexible line capacity	28	24	4	-	20	8	12	9	11	5	24	4	24	-	12	17	6	23
	20%	20%	27%	-%	25%	14%	43%	38%	30%	27%	24%	10%	28%	-%	19%	22%	10%	28%
		85%	15%	-%	72%	28%	43%	32%	40%	19%	87%	13%	87%	-%	41%	59%	20%	80%
Easy to use	28	26	2	-	17	12	5	2	8	3	17	11	15	2	14	15	15	13
	20%	21%	12%	-%	20%	21%	18%	8%	22%	13%	17%	31%	17%	14%	22%	19%	26%	17%
		94%	6%	-%	58%	42%	18%	6%	29%	9%	60%	40%	53%	7%	48%	52%	51%	47%
Call management functionality	27	26	1	-	9	18	2	1	2	4	23	4	13	10	12	14	17	8
	19%	21%	5%	-%	10%	32%	8%	3%	5%	19%	22%	10%	14%	71%	20%	19%	31%	10%
		97%	3%	-%	33%	67%	9%	3%	7%	14%	86%	14%	47%	39%	46%	54%	65%	29%
Requires little post purchase support	8	6	2	-	3	5	1	3	1	-	3	5	3	-	2	6	4	4
	6%	5%	12%	-%	4%	9%	3%	11%	3%	-%	3%	14%	3%	-%	3%	8%	7%	5%
		77%	23%	-%	38%	62%	10%	33%	13%	-%	38%	62%	38%	-%	20%	80%	52%	48%
Data connectivity	6	5	1	-	3	3	1	1	2	-	4	2	4	-	*	5	2	4
	4%	4%	7%	-%	4%	4%	4%	5%	6%	-%	4%	5%	5%	-%	1%	7%	3%	5%
		82%	18%	-%	57%	43%	18%	19%	37%	-%	69%	31%	69%	-%	7%	93%	27%	66%
Provides voice & data communications via the same service	2	2	-	-	2	*	-	1	1	-	2	*	2	-	1	2	1	1
	2%	2%	-%	-%	2%	1%	-%	3%	2%	-%	2%	1%	2%	-%	1%	2%	2%	2%
		100%	-%	-%	83%	17%	-%	32%	32%	-%	83%	17%	83%	-%	32%	68%	49%	51%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 36

**B3AB. What is the most important functional value of ISDN2/2e for your organisation? (SINGLE CODE)**

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	*b	*c	d	e	f	*g	h	*i	j	k	l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	141	123	18	-	88	53	33	28	42	25	105	36	94	11	58	83	43	94
Effective Weighted Sample	98	83	18	-	60	37	32	28	34	21	77	22	72	7	42	56	27	81
Total	139	124	16	-	82	57	28	24	38	20	103	37	88	15	62	77	57	80
		89%	11%	-%	59%	41%	20%	17%	27%	14%	74%	26%	63%	11%	45%	55%	41%	57%
Voice connectivity	2	1	1	-	1	1	-	2	1	-	2	-	2	-	2	-	-	2
	1%	1%	5%	-%	1%	1%	-%	7%	2%	-%	2%	-%	2%	-%	3%	-%	-%	2%
		50%	50%	-%	50%	50%	-%	100%	50%	-%	100%	-%	100%	-%	100%	-%	-%	100%
LAN connectivity	*	*	-	-	*	-	-	-	*	-	-	*	-	-	*	-	-	*
	*%	*%	-%	-%	1%	-%	-%	-%	1%	-%	-%	1%	-%	-%	1%	-%	-%	1%
		100%	-%	-%	100%	-%	-%	-%	100%	-%	-%	100%	-%	-%	100%	-%	-%	100%
CTI capability (Computer Telephony Integration)	*	*	-	-	*	-	-	-	-	-	-	*	-	-	*	-	*	-
	*%	*%	-%	-%	1%	-%	-%	-%	-%	-%	-%	1%	-%	-%	1%	-%	1%	-%
		100%	-%	-%	100%	-%	-%	-%	-%	-%	-%	100%	-%	-%	100%	-%	100%	-%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 36

B3AB. What is the most important functional value of ISDN2/2e for your organisation? (SINGLE CODE)

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
	Total	NEVER			YES	NO	YES	NO/DK	UP TO		YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
		LAST YEAR	EVER	/DK					3 YEARS	4+ YEARS									
Significance Level: 95%		*a	b	c	d	e	f	*g	h	i	j	*k	l	m	n	*o	p	q	*r
Unweighted total	141	27	81	33	93	33	55	19	104	30	63	11	37	45	37	22	44	50	17
Effective Weighted Sample	98	19	63	19	67	20	35	13	74	21	42	6	29	41	33	16	39	41	14
Total	139	27	76	37	91	33	56	25	103	26	69	13	33	36	30	21	36	43	14
		19%	54%	26%	65%	23%	41%	18%	74%	19%	50%	9%	24%	26%	21%	15%	26%	31%	10%
Reliable	37	6	22	9	23	9	17	2	29	8	18	*	9	13	9	4	15	10	9
	27%	22%	29%	26%	25%	27%	29%	7%	28%	29%	26%	3%	26%	36%	31%	20%	40%	23%	64%
		16%	59%	25%	62%	23%	44%	5%	78%	20%	48%	1%	23%	34%	24%	11%	39%	27%	24%
Flexible line capacity	28	9	14	5	24	3	10	2	20	8	10	2	11	12	10	6	11	15	2
	20%	35%	19%	13%	27%	10%	17%	7%	20%	30%	14%	14%	35%	34%	32%	29%	30%	34%	14%
		33%	51%	16%	87%	12%	34%	6%	72%	28%	34%	6%	40%	43%	34%	21%	38%	52%	7%
Easy to use	28	6	14	9	18	6	10	7	19	3	13	5	7	6	3	4	6	10	1
	20%	21%	18%	24%	20%	19%	18%	29%	18%	12%	19%	36%	22%	17%	11%	21%	18%	22%	9%
		20%	48%	31%	63%	22%	36%	26%	67%	11%	46%	16%	26%	22%	12%	15%	23%	34%	4%
Call management functionality	27	3	17	6	16	6	13	8	22	2	16	5	3	2	4	4	1	5	1
	19%	12%	23%	17%	18%	19%	23%	32%	21%	6%	23%	39%	8%	5%	12%	21%	3%	11%	6%
		12%	65%	23%	61%	23%	48%	30%	82%	6%	60%	19%	10%	6%	14%	17%	5%	18%	3%
Requires little post purchase support	8	-	4	4	3	4	3	4	4	4	7	-	-	-	-	-	1	-	1
	6%	-%	5%	11%	3%	12%	5%	15%	4%	16%	10%	-%	-%	-%	-%	-%	3%	-%	7%
		-%	48%	52%	38%	49%	38%	49%	48%	52%	87%	-%	-%	-%	-%	-%	13%	-%	13%
Data connectivity	6	1	3	2	4	2	2	2	5	1	3	*	1	1	2	1	1	2	-
	4%	4%	4%	5%	4%	6%	3%	7%	5%	4%	5%	3%	3%	3%	7%	5%	3%	5%	-%
		19%	49%	31%	61%	31%	31%	31%	81%	19%	56%	7%	19%	18%	37%	19%	18%	37%	-%
Provides voice & data communications via the same service	2	1	1	1	*	2	1	*	2	-	1	*	1	1	1	1	-	1	-
	2%	3%	1%	2%	*%	6%	2%	2%	2%	-%	2%	3%	2%	2%	3%	4%	-%	2%	-%
		32%	34%	34%	17%	83%	51%	17%	100%	-%	51%	17%	32%	32%	32%	32%	-%	32%	-%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r



# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 36

**B3AB. What is the most important functional value of ISDN2/2e for your organisation? (SINGLE CODE)**

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
								UP TO 3 YEARS	4+ YEARS						UP TO 2 YEARS	OVER 2 YEARS			
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK			YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX			YES	NO/DK
Significance Level: 95%	*a	b	c	d	e	f	*g	h	i	j	*k	l	m	n	*o	p	q	*r	
Unweighted total	141	27	81	33	93	33	55	19	104	30	63	11	37	45	37	22	44	50	17
Effective Weighted Sample	98	19	63	19	67	20	35	13	74	21	42	6	29	41	33	16	39	41	14
Total	139	27	76	37	91	33	56	25	103	26	69	13	33	36	30	21	36	43	14
		19%	54%	26%	65%	23%	41%	18%	74%	19%	50%	9%	24%	26%	21%	15%	26%	31%	10%
Voice connectivity	2	1	1	-	2	-	1	-	2	-	1	-	1	1	1	-	1	1	-
	1%	3%	1%	-%	2%	-%	1%	-%	2%	-%	1%	-%	2%	2%	3%	-%	2%	2%	-%
		50%	50%	-%	100%	-%	50%	-%	100%	-%	50%	-%	50%	50%	50%	-%	50%	50%	-%
LAN connectivity	*	-	-	*	*	-	-	-	*	-	-	-	-	*	*	-	*	*	-
	*%	-%	-%	1%	*%	-%	-%	-%	*%	-%	-%	-%	-%	1%	1%	-%	1%	1%	-%
		-%	-%	100%	100%	-%	-%	-%	100%	-%	-%	-%	-%	100%	100%	-%	100%	100%	-%
CTI capability (Computer Telephony Integration)	*	-	-	*	-	*	*	-	-	*	*	-	-	-	-	-	-	-	-
	*%	-%	-%	1%	-%	1%	1%	-%	-%	2%	1%	-%	-%	-%	-%	-%	-%	-%	-%
		-%	-%	100%	-%	100%	100%	-%	-%	100%	100%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 37**

**B3BA. Overall, what do you regard as the main functional value(s) of ISDN30 for your organisation? (MULTI CODE)**

Base : Those who use ISN30 (and mostly use an ISDN service)

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION												IP SWITCHED		IP NOT SWITCHED		ANY IP
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	ISDN	ISDN						
					£1M	£1M-£20M	£21M-£100M	OVER £100M																	
Significance Level: 95%		*a	b	c	*d	e	f	g	h	i	*j	k	l	*m	n	o	p	q	*r	s					
Unweighted total	137	25	32	79	16	37	45	37	61	137	-	76	61	-	43	61	61	52	8	61					
Effective Weighted Sample	133	25	32	79	16	36	44	36	60	133	-	74	60	-	42	60	60	51	8	60					
Total	122	26	33	62	16	35	41	29	52	122	-	70	52	-	37	54	54	47	7	54					
		22%	27%	51%	13%	29%	33%	24%	43%	100%	-%	57%	43%	-%	30%	45%	45%	38%	6%	45%					
Easy to use	75	15	23	38	7	21	29	18	34	75	-	41	34	-	26	38	38	32	5	38					
	62%	56%	69%	61%	45%	59%	70%	61%	66%	62%	-%	59%	66%	-%	72%	71%	71%	69%	77%	71%					
		20%	30%	50%	9%	27%	38%	23%	46%	100%	-%	54%	46%	-%	35%	51%	51%	43%	7%	51%					
Reliable	65	10	21	34	8	16	21	20	30	65	-	35	30	-	23	33	33	29	4	33					
	53%	40%	63%	54%	50%	45%	51%	70%	57%	53%	-%	51%	57%	-%	62%	60%	60%	61%	58%	60%					
		16%	32%	52%	12%	24%	32%	31%	45%	100%	-%	55%	45%	-%	35%	50%	50%	44%	6%	50%					
Data connectivity	57	12	19	27	4	13	22	18	24	57	-	33	24	-	18	29	29	25	4	29					
	47%	45%	56%	43%	28%	36%	54%	64%	46%	47%	-%	48%	46%	-%	48%	53%	53%	54%	58%	53%					
		21%	32%	47%	8%	22%	38%	32%	42%	100%	-%	58%	42%	-%	31%	51%	51%	44%	7%	51%					
Call management functionality	54	9	14	30	7	8	22	16	30	54	-	23	30	-	24	31	31	28	2	31					
	44%	35%	44%	48%	45%	23%	53%	56%	58%	44%	-%	33%	58%	-%	65%	56%	56%	60%	35%	56%					
		17%	27%	56%	13%	15%	40%	30%	57%	100%	-%	43%	57%	-%	44%	57%	57%	53%	4%	57%					
Flexible line capacity	47	10	12	24	2	10	17	17	24	47	-	23	24	-	20	28	28	25	3	28					
	39%	40%	38%	39%	14%	30%	42%	59%	46%	39%	-%	33%	46%	-%	56%	52%	52%	54%	47%	52%					
		22%	26%	52%	5%	22%	36%	35%	51%	100%	-%	49%	51%	-%	43%	60%	60%	54%	7%	60%					
Requires little post purchase support	46	11	9	26	3	13	14	15	27	46	-	19	27	-	22	27	27	25	2	27					
	38%	40%	28%	42%	20%	36%	33%	52%	52%	38%	-%	27%	52%	-%	60%	50%	50%	53%	35%	50%					
		23%	20%	57%	7%	27%	29%	33%	59%	100%	-%	41%	59%	-%	48%	59%	59%	54%	5%	59%					
LAN connectivity	41	5	15	20	3	8	16	14	19	41	-	22	19	-	14	25	25	22	3	25					
	33%	21%	47%	32%	19%	22%	38%	50%	36%	33%	-%	31%	36%	-%	39%	47%	47%	47%	50%	47%					
		13%	38%	49%	7%	19%	38%	35%	47%	100%	-%	53%	47%	-%	36%	62%	62%	54%	8%	62%					
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																									

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 37**

**B3BA. Overall, what do you regard as the main functional value(s) of ISDN30 for your organisation? (MULTI CODE)**

Base : Those who use ISN30 (and mostly use an ISDN service)

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP SWITCHED	IP NOT SWITCHED	ANY
					£1M	£1M-£20M	£21M-£100M	OVER £100M												
Significance Level: 95%		*a	b	c	*d	e	f	g	h	i	*j	k	l	*m	n	o	p	q	*r	s
Unweighted total	137	25	32	79	16	37	45	37	61	137	-	76	61	-	43	61	61	52	8	61
Effective Weighted Sample	133	25	32	79	16	36	44	36	60	133	-	74	60	-	42	60	60	51	8	60
Total	122	26	33	62	16	35	41	29	52	122	-	70	52	-	37	54	54	47	7	54
		22%	27%	51%	13%	29%	33%	24%	43%	100%	-%	57%	43%	-%	30%	45%	45%	38%	6%	45%
Voice connectivity	40	3	12	24	3	8	15	13	21	40	-	19	21	-	16	21	21	18	3	21
	33%	13%	38%	39%	21%	22%	37%	44%	40%	33%	-%	28%	40%	-%	43%	38%	38%	38%	50%	38%
		8%	31%	61%	8%	19%	38%	31%	52%	100%	-%	48%	52%	-%	40%	52%	52%	44%	8%	52%
Provides voice & data communications via the same service	39	5	12	21	5	4	19	11	25	39	-	14	25	-	21	26	26	24	2	26
	32%	20%	38%	34%	30%	11%	47%	39%	48%	32%	-%	20%	48%	-%	56%	48%	48%	52%	23%	48%
		13%	32%	55%	12%	10%	49%	28%	64%	100%	-%	36%	64%	-%	53%	67%	67%	63%	4%	67%
CTI capability (Computer Telephony Integration)	15	2	2	10	1	2	5	6	9	15	-	5	9	-	8	8	8	6	2	8
	12%	9%	6%	16%	7%	5%	13%	19%	18%	12%	-%	8%	18%	-%	23%	16%	16%	13%	35%	16%
		15%	14%	70%	8%	13%	36%	38%	64%	100%	-%	36%	64%	-%	58%	58%	58%	42%	16%	58%
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																				

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 37**

**B3BA. Overall, what do you regard as the main functional value(s) of ISDN30 for your organisation? (MULTI CODE)**

Base : Those who use ISN30 (and mostly use an ISDN service)

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN30			ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		ISDN2	IP															
Significance Level: 95%		a	b	*c	d	*e	f	g	h	*i	j	k	l	*m	n	o	p	q
Unweighted total	137	43	94	-	40	21	83	54	40	21	105	32	94	11	66	71	40	94
Effective Weighted Sample	133	42	91	-	40	21	80	53	39	21	103	30	92	11	64	70	38	93
Total	122	36	85	-	33	19	73	49	36	19	93	29	84	9	60	61	38	81
		30%	70%	-%	27%	15%	60%	40%	29%	15%	76%	24%	69%	8%	50%	50%	31%	66%
Easy to use	75	25	51	-	20	14	49	26	26	12	56	19	52	4	33	42	23	50
	62%	68%	59%	-%	61%	76%	68%	53%	72%	67%	61%	66%	63%	43%	55%	69%	61%	62%
		33%	67%	-%	27%	19%	66%	34%	34%	17%	75%	25%	70%	5%	44%	56%	31%	66%
Reliable	65	21	44	-	20	9	44	21	24	9	49	16	42	7	29	36	12	52
	53%	57%	52%	-%	61%	50%	61%	42%	67%	46%	53%	55%	51%	71%	49%	58%	31%	65%
							g		g								p	
		32%	68%	-%	31%	14%	68%	32%	37%	13%	75%	25%	65%	10%	45%	55%	18%	80%
Data connectivity	57	16	41	-	14	10	37	20	22	7	49	8	48	2	31	27	16	39
	47%	45%	48%	-%	43%	53%	51%	42%	61%	39%	53%	27%	57%	17%	51%	43%	42%	49%
											k							
		29%	71%	-%	25%	18%	65%	35%	38%	13%	86%	14%	84%	3%	54%	46%	28%	69%
Call management functionality	54	20	34	-	20	11	33	21	25	6	41	12	41	-	25	29	12	39
	44%	55%	39%	-%	59%	57%	45%	43%	69%	32%	45%	42%	50%	-%	41%	47%	32%	49%
									fg									
		37%	63%	-%	37%	20%	61%	39%	46%	11%	77%	23%	77%	-%	46%	54%	23%	73%
Flexible line capacity	47	20	27	-	18	6	34	13	23	5	43	4	39	3	18	29	11	36
	39%	54%	32%	-%	53%	34%	47%	27%	65%	28%	46%	15%	47%	38%	30%	48%	28%	44%
		b			g		g		g		k				n			
		42%	58%	-%	38%	14%	72%	28%	49%	11%	91%	9%	83%	7%	38%	62%	23%	75%
Requires little post purchase support	46	17	29	-	17	10	27	19	20	7	37	9	34	3	22	24	11	35
	38%	46%	34%	-%	51%	53%	37%	39%	56%	39%	40%	32%	41%	29%	37%	38%	29%	43%
		37%	63%	-%	37%	22%	59%	41%	44%	16%	80%	20%	74%	6%	49%	51%	24%	76%
LAN connectivity	41	13	28	-	12	7	31	10	21	5	38	3	38	-	23	17	10	31
	33%	36%	32%	-%	35%	38%	42%	20%	58%	25%	40%	11%	45%	-%	39%	28%	27%	38%
							g		dg		k							
		32%	68%	-%	29%	18%	76%	24%	51%	11%	92%	8%	92%	-%	57%	43%	25%	75%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 37

B3BA. Overall, what do you regard as the main functional value(s) of ISDN30 for your organisation? (MULTI CODE)

Base : Those who use ISN30 (and mostly use an ISDN service)

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
Significance Level: 95%		a	b	*c	d	*e	f	g	h	*i	j	k	l	*m	n	o	p	q
Unweighted total	137	43	94	-	40	21	83	54	40	21	105	32	94	11	66	71	40	94
Effective Weighted Sample	133	42	91	-	40	21	80	53	39	21	103	30	92	11	64	70	38	93
Total	122	36	85	-	33	19	73	49	36	19	93	29	84	9	60	61	38	81
		30%	70%	-%	27%	15%	60%	40%	29%	15%	76%	24%	69%	8%	50%	50%	31%	66%
Voice connectivity	40	18	22	-	18	3	30	10	16	5	33	7	31	2	18	22	11	28
	33%	50%	26%	-%	53%	17%	41%	20%	43%	29%	36%	25%	37%	26%	30%	36%	30%	34%
		b			g		g		g									
		46%	54%	-%	44%	8%	75%	25%	39%	14%	82%	18%	76%	6%	45%	55%	28%	69%
Provides voice & data communications via the same service	39	17	22	-	15	10	24	15	21	5	35	4	35	-	18	21	8	30
	32%	48%	25%	-%	46%	51%	33%	30%	59%	26%	37%	15%	41%	-%	29%	34%	20%	38%
		b							fg		k						p	
		45%	55%	-%	39%	25%	62%	38%	54%	13%	89%	11%	89%	-%	46%	54%	20%	78%
CTI capability (Computer Telephony Integration)	15	8	7	-	7	3	8	6	8	1	13	2	11	2	3	12	5	10
	12%	21%	8%	-%	20%	14%	11%	13%	21%	4%	14%	5%	13%	21%	5%	19%	12%	12%
		b													n			
		53%	47%	-%	45%	19%	56%	44%	53%	5%	89%	11%	76%	13%	20%	80%	32%	68%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 37

B3BA. Overall, what do you regard as the main functional value(s) of ISDN30 for your organisation? (MULTI CODE)

Base : Those who use ISN30 (and mostly use an ISDN service)

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
	Total	NEVER			YES	NO	YES	NO/DK	UP TO		YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
		LAST YEAR	EVER	/DK					3 YEARS	4+ YEARS									
Significance Level: 95%		*a	b	*c	d	*e	f	*g	h	i	j	*k	l	m	n	*o	p	q	*r
Unweighted total	137	26	83	28	95	29	59	17	102	32	64	12	34	47	31	25	36	48	13
Effective Weighted Sample	133	26	80	27	92	28	57	17	99	31	62	12	33	46	30	25	35	47	13
Total	122	22	74	25	83	26	51	16	91	28	56	11	30	42	27	23	31	43	12
		18%	61%	21%	68%	21%	42%	13%	74%	23%	46%	9%	25%	34%	22%	19%	26%	35%	10%
Easy to use	75	15	40	20	48	19	26	11	56	17	30	7	19	31	20	16	22	30	9
	62%	67%	54%	80%	57%	72%	51%	67%	62%	62%	53%	63%	64%	74%	75%	70%	71%	69%	76%
		20%	53%	27%	63%	25%	35%	15%	74%	23%	40%	9%	25%	41%	27%	22%	29%	39%	12%
Reliable	65	11	39	16	46	15	24	8	47	16	26	6	21	26	17	11	22	26	7
	53%	48%	52%	62%	55%	57%	48%	49%	51%	59%	46%	58%	71%	61%	63%	47%	69%	60%	58%
		17%	60%	24%	70%	23%	38%	12%	72%	25%	40%	10%	33%	39%	26%	17%	33%	40%	10%
Data connectivity	57	13	31	13	40	9	22	6	44	11	24	4	18	24	18	11	18	25	4
	47%	59%	42%	52%	48%	33%	44%	37%	49%	39%	43%	36%	59%	59%	65%	45%	59%	57%	38%
		23%	54%	23%	70%	15%	39%	11%	77%	19%	43%	7%	31%	43%	31%	18%	32%	43%	8%
Call management functionality	54	12	32	9	40	8	18	5	43	11	18	5	22	24	15	14	16	26	4
	44%	56%	44%	35%	47%	29%	35%	34%	47%	39%	32%	48%	73%	59%	57%	61%	53%	62%	36%
		23%	60%	16%	74%	14%	33%	10%	79%	21%	33%	10%	41%	46%	29%	26%	31%	49%	8%
Flexible line capacity	47	15	26	7	38	7	15	3	34	13	15	4	20	21	15	10	18	26	2
	39%	66%	35%	27%	46%	25%	30%	21%	37%	48%	27%	33%	68%	49%	57%	44%	58%	61%	20%
		31%	55%	14%	80%	14%	32%	7%	71%	29%	32%	8%	43%	44%	33%	22%	39%	55%	5%
Requires little post purchase support	46	14	26	6	38	5	17	2	35	11	17	2	16	22	18	11	16	24	3
	38%	63%	35%	23%	45%	19%	33%	12%	39%	38%	30%	17%	54%	53%	66%	48%	52%	56%	27%
		30%	57%	12%	82%	11%	37%	4%	77%	23%	37%	4%	35%	48%	39%	24%	35%	52%	7%
LAN connectivity	41	11	22	7	33	4	13	2	32	7	12	3	15	22	18	11	14	21	4
	33%	51%	30%	29%	39%	16%	26%	13%	36%	25%	22%	27%	50%	52%	66%	49%	45%	49%	38%
		28%	54%	18%	80%	10%	32%	5%	80%	18%	30%	7%	37%	53%	44%	28%	35%	52%	11%
Voice connectivity	40	9	21	11	25	9	13	7	29	10	16	3	12	15	14	9	12	17	4
	33%	41%	28%	42%	30%	36%	25%	40%	32%	35%	28%	32%	39%	35%	50%	40%	38%	40%	31%
		23%	51%	26%	62%	23%	31%	16%	72%	25%	39%	9%	29%	37%	34%	23%	29%	43%	9%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 37

B3BA. Overall, what do you regard as the main functional value(s) of ISDN30 for your organisation? (MULTI CODE)

Base : Those who use ISN30 (and mostly use an ISDN service)

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
								UP TO 3 YEARS	4+ YEARS						UP TO 2 YEARS	OVER 2 YEARS			
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK			YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX			YES	NO/DK
Significance Level: 95%	*a	b	*c	d	*e	f	*g	h	i	j	*k	l	m	n	*o	p	q	*r	
Unweighted total	137	26	83	28	95	29	59	17	102	32	64	12	34	47	31	25	36	48	13
Effective Weighted Sample	133	26	80	27	92	28	57	17	99	31	62	12	33	46	30	25	35	47	13
Total	122	22	74	25	83	26	51	16	91	28	56	11	30	42	27	23	31	43	12
		18%	61%	21%	68%	21%	42%	13%	74%	23%	46%	9%	25%	34%	22%	19%	26%	35%	10%
Provides voice & data communications via the same service	39	9	24	5	34	2	10	3	33	6	12	1	17	22	16	10	16	24	2
	32%	42%	33%	20%	41%	9%	20%	16%	36%	21%	22%	7%	56%	52%	61%	44%	50%	55%	20%
		24%	63%	13%	87%	6%	27%	7%	85%	15%	31%	2%	43%	56%	42%	26%	40%	60%	6%
CTI capability (Computer Telephony Integration)	15	6	5	3	11	3	4	2	8	6	5	2	6	6	8	3	5	7	2
	12%	28%	7%	13%	13%	12%	8%	12%	9%	23%	8%	15%	20%	14%	28%	15%	16%	16%	14%
		44%	35%	22%	73%	22%	29%	13%	56%	44%	31%	11%	42%	40%	53%	24%	34%	47%	11%
Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																			

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 38

## B3BB. What is the most important functional value of ISDN30 for your organisation? (SINGLE CODE)

Base : Those who use ISN30 (and mostly use an ISDN service)

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											
	Total	UNDER			£1M	£1M-£20M	£21M-£100M	OVER £100M	ISDN2	ISDN30 ONLY	ISDN2 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP SWITCHED		IP NOT SWITCHED	ANY IP
		1-49	50-249	250+													ISDN	ISDN		
Significance Level: 95%		*a	b	c	*d	e	f	g	h	i	*j	k	l	*m	n	o	p	q	*r	s
Unweighted total	137	25	32	79	16	37	45	37	61	137	-	76	61	-	43	61	61	52	8	61
Effective Weighted Sample	133	25	32	79	16	36	44	36	60	133	-	74	60	-	42	60	60	51	8	60
Total	122	26	33	62	16	35	41	29	52	122	-	70	52	-	37	54	54	47	7	54
		22%	27%	51%	13%	29%	33%	24%	43%	100%	-%	57%	43%	-%	30%	45%	45%	38%	6%	45%
Easy to use	33	5	12	16	3	15	11	5	14	33	-	20	14	-	9	16	16	13	2	16
	27%	20%	38%	25%	18%	42%	27%	17%	26%	27%	-%	28%	26%	-%	25%	30%	30%	28%	30%	30%
		16%	37%	47%	9%	44%	33%	14%	41%	100%	-%	59%	41%	-%	28%	49%	49%	39%	6%	49%
Reliable	27	6	5	16	7	6	5	8	10	27	-	18	10	-	7	8	8	6	2	8
	23%	25%	16%	25%	43%	18%	13%	28%	19%	23%	-%	25%	19%	-%	19%	15%	15%	12%	35%	15%
		24%	19%	58%	25%	23%	19%	30%	35%	100%	-%	65%	35%	-%	26%	30%	30%	21%	9%	30%
Flexible line capacity	24	6	7	10	-	7	10	6	13	24	-	11	13	-	11	16	16	15	1	16
	19%	24%	22%	16%	-%	20%	25%	22%	25%	19%	-%	15%	25%	-%	30%	29%	29%	33%	12%	29%
		26%	30%	43%	-%	30%	44%	27%	55%	100%	-%	45%	55%	-%	47%	68%	68%	64%	3%	68%
Call management functionality	11	3	4	4	3	3	4	2	6	11	-	5	6	-	3	4	4	4	-	4
	9%	12%	13%	6%	20%	8%	9%	6%	12%	9%	-%	7%	12%	-%	8%	7%	7%	8%	-%	7%
		28%	37%	35%	28%	25%	33%	14%	56%	100%	-%	44%	56%	-%	25%	35%	35%	35%	-%	35%
Data connectivity	10	3	2	5	1	2	3	4	3	10	-	7	3	-	3	5	5	3	2	5
	8%	12%	6%	8%	7%	6%	7%	14%	6%	8%	-%	10%	6%	-%	8%	9%	9%	7%	23%	9%
		32%	21%	47%	11%	21%	28%	39%	29%	100%	-%	71%	29%	-%	29%	47%	47%	32%	16%	47%
Requires little post purchase support	6	2	-	4	1	1	1	2	3	6	-	3	3	-	2	2	2	2	-	2
	5%	8%	-%	6%	6%	3%	2%	8%	6%	5%	-%	4%	6%	-%	5%	3%	3%	4%	-%	3%
		35%	-%	65%	16%	19%	13%	39%	55%	100%	-%	45%	55%	-%	29%	29%	29%	29%	-%	29%
Voice connectivity	5	-	1	4	-	-	3	2	2	5	-	3	2	-	2	3	3	3	-	3
	4%	-%	3%	6%	-%	-%	8%	6%	5%	4%	-%	4%	5%	-%	4%	5%	5%	6%	-%	5%
		-%	21%	79%	-%	-%	68%	32%	48%	100%	-%	52%	48%	-%	32%	52%	52%	52%	-%	52%
Provides voice & data communications via the same service	2	-	-	2	1	-	2	-	1	2	-	2	1	-	-	-	-	-	-	-
	2%	-%	-%	4%	5%	-%	4%	-%	2%	2%	-%	2%	2%	-%	-%	-%	-%	-%	-%	-%
		-%	-%	100%	33%	-%	67%	-%	33%	100%	-%	67%	33%	-%	-%	-%	-%	-%	-%	-%
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																				



# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 38**

**B3BB. What is the most important functional value of ISDN30 for your organisation? (SINGLE CODE)**

Base : Those who use ISN30 (and mostly use an ISDN service)

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION												
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30		IP NOT ISDN	ISDN30		IP SWITCHED		IP NOT SWITCHED		ANY
					£1M	£1M-£20M	£21M-£100M	OVER £100M				ONLY	BOTH		& IP	& IP	ISDN	ISDN			
Significance Level: 95%		*a	b	c	*d	e	f	g	h	i	*j	k	l	*m	n	o	p	q	*r	s	
Unweighted total	137	25	32	79	16	37	45	37	61	137	-	76	61	-	43	61	61	52	8	61	
Effective Weighted Sample	133	25	32	79	16	36	44	36	60	133	-	74	60	-	42	60	60	51	8	60	
Total	122	26	33	62	16	35	41	29	52	122	-	70	52	-	37	54	54	47	7	54	
		22%	27%	51%	13%	29%	33%	24%	43%	100%	-%	57%	43%	-%	30%	45%	45%	38%	6%	45%	
CTI capability (Computer Telephony Integration)	2	-	-	2	-	1	1	-	-	2	-	2	-	-	-	-	-	-	-	-	
	1%	-%	-%	3%	-%	2%	2%	-%	-%	1%	-%	2%	-%	-%	-%	-%	-%	-%	-%	-%	
		-%	-%	100%	-%	50%	50%	-%	-%	100%	-%	100%	-%	-%	-%	-%	-%	-%	-%	-%	
LAN connectivity	1	-	1	-	-	-	1	-	-	1	-	1	-	-	-	1	1	1	-	1	
	1%	-%	3%	-%	-%	-%	3%	-%	-%	1%	-%	1%	-%	-%	-%	2%	2%	2%	-%	2%	
		-%	100%	-%	-%	-%	100%	-%	-%	100%	-%	100%	-%	-%	-%	100%	100%	100%	-%	100%	

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 38

B3BB. What is the most important functional value of ISDN30 for your organisation? (SINGLE CODE)

Base : Those who use ISN30 (and mostly use an ISDN service)

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN30			ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		ISDN2	IP															
Significance Level: 95%		a	b	*c	d	*e	f	g	h	*i	j	k	l	*m	n	o	p	q
Unweighted total	137	43	94	-	40	21	83	54	40	21	105	32	94	11	66	71	40	94
Effective Weighted Sample	133	42	91	-	40	21	80	53	39	21	103	30	92	11	64	70	38	93
Total	122	36	85	-	33	19	73	49	36	19	93	29	84	9	60	61	38	81
		30%	70%	-%	27%	15%	60%	40%	29%	15%	76%	24%	69%	8%	50%	50%	31%	66%
Easy to use	33	10	23	-	6	8	17	16	9	7	25	9	23	2	17	17	13	21
	27%	28%	27%	-%	17%	42%	24%	33%	25%	39%	26%	31%	27%	17%	27%	27%	34%	26%
		31%	69%	-%	17%	23%	52%	48%	27%	22%	73%	27%	69%	5%	50%	50%	38%	62%
Reliable	27	7	21	-	7	3	17	10	5	3	17	11	13	4	13	15	6	20
	23%	18%	24%	-%	20%	17%	24%	21%	13%	18%	18%	37%	15%	45%	21%	24%	17%	25%
		24%	76%	-%	24%	12%	63%	37%	17%	12%	61%	39%	46%	15%	47%	53%	23%	72%
Flexible line capacity	24	11	12	-	12	1	17	7	13	3	23	1	21	2	11	12	8	16
	19%	31%	15%	-%	36%	6%	23%	15%	38%	14%	25%	3%	25%	21%	19%	20%	20%	20%
		b			g				g		k							
		48%	52%	-%	51%	5%	70%	30%	57%	11%	97%	3%	89%	8%	48%	52%	32%	68%
Call management functionality	11	3	9	-	4	2	5	7	2	2	8	3	8	-	8	3	2	8
	9%	7%	10%	-%	13%	11%	6%	13%	6%	10%	8%	12%	9%	-%	13%	6%	5%	10%
		23%	77%	-%	37%	18%	41%	59%	18%	16%	70%	30%	70%	-%	70%	30%	18%	72%
Data connectivity	10	1	9	-	-	3	7	3	4	1	9	1	9	-	3	7	3	7
	8%	3%	10%	-%	-%	16%	10%	6%	11%	4%	10%	3%	11%	-%	5%	12%	8%	8%
		11%	89%	-%	-%	29%	71%	29%	40%	8%	90%	10%	90%	-%	29%	71%	32%	68%
Requires little post purchase support	6	2	4	-	2	2	2	4	1	1	4	2	4	-	2	4	2	4
	5%	4%	5%	-%	5%	9%	2%	9%	2%	5%	4%	7%	5%	-%	4%	6%	6%	5%
		26%	74%	-%	26%	29%	26%	74%	13%	16%	68%	32%	68%	-%	35%	65%	35%	65%
Voice connectivity	5	2	3	-	2	-	5	-	1	2	4	1	3	1	4	1	2	3
	4%	6%	3%	-%	7%	-%	7%	-%	2%	10%	5%	3%	4%	9%	7%	1%	4%	4%
		48%	52%	-%	48%	-%	100%	-%	16%	37%	84%	16%	68%	16%	84%	16%	32%	68%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 38

B3BB. What is the most important functional value of ISDN30 for your organisation? (SINGLE CODE)

Base : Those who use ISN30 (and mostly use an ISDN service)

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
Significance Level: 95%		a	b	*c	d	*e	f	g	h	*i	j	k	l	*m	n	o	p	q
Unweighted total	137	43	94	-	40	21	83	54	40	21	105	32	94	11	66	71	40	94
Effective Weighted Sample	133	42	91	-	40	21	80	53	39	21	103	30	92	11	64	70	38	93
Total	122	36	85	-	33	19	73	49	36	19	93	29	84	9	60	61	38	81
		30%	70%	-%	27%	15%	60%	40%	29%	15%	76%	24%	69%	8%	50%	50%	31%	66%
Provides voice & data communications via the same service	2	1	2	-	1	-	2	1	-	-	2	1	2	-	2	1	1	1
	2%	2%	2%	-%	2%	-%	2%	2%	-%	-%	2%	3%	2%	-%	3%	1%	2%	1%
		33%	67%	-%	33%	-%	67%	33%	-%	-%	67%	33%	67%	-%	67%	33%	33%	33%
CTI capability (Computer Telephony Integration)	2	-	2	-	-	-	1	1	-	-	1	1	-	1	-	2	2	-
	1%	-%	2%	-%	-%	-%	1%	2%	-%	-%	1%	3%	-%	9%	-%	3%	4%	-%
		-%	100%	-%	-%	-%	50%	50%	-%	-%	50%	50%	-%	50%	-%	100%	100%	-%
LAN connectivity	1	-	1	-	-	-	1	-	1	-	1	-	1	-	1	-	-	1
	1%	-%	1%	-%	-%	-%	1%	-%	3%	-%	1%	-%	1%	-%	2%	-%	-%	1%
		-%	100%	-%	-%	-%	100%	-%	100%	-%	100%	-%	100%	-%	100%	-%	-%	100%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 38**

**B3BB. What is the most important functional value of ISDN30 for your organisation? (SINGLE CODE)**

Base : Those who use ISN30 (and mostly use an ISDN service)

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
								UP TO							UP TO				OVER
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	2 YEARS	2 YEARS	YES	NO/DK
Significance Level: 95%		*a	b	*c	d	*e	f	*g	h	i	j	*k	l	m	n	*o	p	q	*r
Unweighted total	137	26	83	28	95	29	59	17	102	32	64	12	34	47	31	25	36	48	13
Effective Weighted Sample	133	26	80	27	92	28	57	17	99	31	62	12	33	46	30	25	35	47	13
Total	122	22	74	25	83	26	51	16	91	28	56	11	30	42	27	23	31	43	12
		18%	61%	21%	68%	21%	42%	13%	74%	23%	46%	9%	25%	34%	22%	19%	26%	35%	10%
Easy to use	33	5	21	7	21	7	13	4	26	6	14	3	8	12	4	10	6	11	5
	27%	23%	29%	28%	25%	25%	25%	26%	28%	23%	25%	29%	25%	30%	16%	44%	19%	26%	42%
		16%	64%	21%	62%	20%	39%	13%	77%	19%	42%	9%	23%	37%	13%	31%	18%	34%	15%
Reliable	27	2	16	10	13	11	13	6	16	10	14	5	3	6	7	2	6	4	4
	23%	7%	21%	40%	16%	44%	26%	37%	18%	35%	25%	49%	11%	15%	24%	8%	20%	9%	36%
		6%	57%	37%	49%	42%	49%	22%	60%	36%	51%	19%	12%	23%	24%	7%	23%	14%	15%
Flexible line capacity	24	10	12	1	21	2	6	2	19	5	8	-	12	12	8	5	11	15	1
	19%	47%	17%	3%	25%	6%	11%	12%	21%	18%	14%	-	42%	30%	29%	23%	34%	36%	7%
		44%	52%	3%	89%	7%	24%	8%	79%	21%	32%	-	53%	53%	33%	23%	45%	64%	3%
Call management functionality	11	1	10	-	9	1	7	1	10	1	7	1	3	4	2	1	3	3	1
	9%	4%	14%	-	11%	3%	13%	5%	11%	3%	12%	7%	10%	9%	7%	4%	9%	7%	9%
		7%	93%	-	83%	7%	58%	7%	93%	7%	58%	7%	25%	35%	16%	9%	25%	25%	9%
Data connectivity	10	3	4	3	7	2	4	1	7	3	4	1	3	3	2	3	2	4	1
	8%	12%	5%	13%	9%	7%	8%	6%	7%	10%	8%	7%	11%	7%	7%	13%	6%	9%	7%
		27%	40%	33%	74%	18%	43%	10%	65%	27%	45%	8%	32%	28%	19%	29%	18%	40%	8%
Requires little post purchase support	6	1	4	1	4	1	4	-	6	-	4	-	-	2	2	2	-	2	-
	5%	4%	6%	3%	5%	3%	8%	-	7%	-	8%	-	-	4%	7%	8%	-	4%	-
		13%	74%	13%	74%	13%	71%	-	100%	-	71%	-	-	29%	29%	29%	-	29%	-
Voice connectivity	5	1	3	2	3	2	2	1	3	2	2	-	1	1	2	-	3	3	-
	4%	4%	4%	6%	4%	6%	3%	5%	3%	8%	4%	-	3%	2%	7%	-	8%	6%	-
		16%	52%	32%	68%	32%	32%	16%	52%	48%	48%	-	16%	21%	37%	-	52%	52%	-

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 38**

**B3BB. What is the most important functional value of ISDN30 for your organisation? (SINGLE CODE)**

Base : Those who use ISN30 (and mostly use an ISDN service)

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%		*a	b	*c	d	*e	f	*g	h	i	j	*k	l	m	n	*o	p	q	*r
Unweighted total	137	26	83	28	95	29	59	17	102	32	64	12	34	47	31	25	36	48	13
Effective Weighted Sample	133	26	80	27	92	28	57	17	99	31	62	12	33	46	30	25	35	47	13
Total	122	22	74	25	83	26	51	16	91	28	56	11	30	42	27	23	31	43	12
		18%	61%	21%	68%	21%	42%	13%	74%	23%	46%	9%	25%	34%	22%	19%	26%	35%	10%
Provides voice & data communications via the same service	2	-	2	1	2	1	2	1	2	1	2	-	-	-	-	-	-	-	-
	2%	-%	2%	3%	2%	3%	3%	5%	2%	3%	4%	-%	-%	-%	-%	-%	-%	-%	-%
		-%	67%	33%	67%	33%	67%	33%	67%	33%	100%	-%	-%	-%	-%	-%	-%	-%	-%
CTI capability (Computer Telephony Integration)	2	-	1	1	1	1	1	1	2	-	1	1	-	-	-	-	-	-	-
	1%	-%	1%	3%	1%	3%	2%	5%	2%	-%	1%	7%	-%	-%	-%	-%	-%	-%	-%
		-%	50%	50%	50%	50%	50%	50%	100%	-%	50%	50%	-%	-%	-%	-%	-%	-%	-%
LAN connectivity	1	-	1	-	1	-	-	-	1	-	-	-	-	1	1	-	1	1	-
	1%	-%	1%	-%	1%	-%	-%	-%	1%	-%	-%	-%	-%	2%	4%	-%	3%	2%	-%
		-%	100%	-%	100%	-%	-%	-%	100%	-%	-%	-%	-%	100%	100%	-%	100%	100%	-%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 39**

## **B4. Have you ever switched your (ISDN2/2e/ ISDN30) supplier? (SINGLE CODE)**

Base : Those who (mostly) use ISN2/2e or ISDN30

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											
	Total	1-49 a	50-249 b	250+ c	UNDER				ISDN2 h	ISDN30 i	ISDN30			IP NOT ISDN *m	ISDN2 & IP n	ISDN30 & IP o	ISDN & IP p	IP		ANY IP s
					£1M- £20M d	£21M-£100M e	£10M f	OVER £100M g			SWITCHED q	IP NOT SWITCHED *r								
Significance Level: 95%																				
Unweighted total	217	44	52	120	30	67	64	52	141	137	80	76	61	-	67	61	85	67	16	85
Effective Weighted Sample	165	35	51	112	21	53	58	46	98	133	49	74	60	-	55	60	73	58	14	73
Total	209	68	61	79	40	70	54	39	139	122	87	70	52	-	57	54	75	61	13	75
		33%	29%	38%	19%	34%	26%	19%	67%	58%	42%	33%	25%	-%	28%	26%	36%	29%	6%	36%
Yes, switched in the last year	33	10	6	17	5	7	9	10	27	22	11	6	16	-	14	14	15	15	-	15
	16%	15%	10%	21%	13%	9%	16%	25%	19%	18%	12%	9%	31%	-%	25%	27%	20%	25%	-%	20%
								e					jk		k	k		k		
		32%	18%	50%	16%	20%	26%	29%	81%	68%	32%	19%	49%	-%	43%	44%	46%	46%	-%	46%
Yes, switched one to two years ago	72	18	26	28	13	24	24	10	42	46	26	30	16	-	18	17	25	25	-	25
	34%	26%	43%	35%	33%	34%	45%	26%	30%	38%	30%	42%	31%	-%	31%	32%	34%	42%	-%	34%
							g													
		25%	36%	39%	18%	33%	34%	14%	59%	64%	36%	41%	23%	-%	25%	24%	35%	35%	-%	35%
Yes, switched three to four years ago	39	8	19	12	4	15	15	4	28	24	15	11	13	-	12	13	17	17	-	17
	19%	12%	32%	15%	11%	22%	28%	11%	20%	20%	17%	16%	25%	-%	21%	24%	23%	29%	-%	23%
			ac				g													
		21%	50%	30%	11%	39%	39%	11%	72%	62%	38%	28%	34%	-%	31%	34%	45%	45%	-%	45%
Yes, switched more than four years ago	8	1	3	4	2	4	1	1	6	4	4	3	2	-	2	2	2	2	-	2
	4%	2%	5%	6%	4%	6%	1%	3%	4%	4%	5%	4%	3%	-%	4%	3%	3%	4%	-%	3%
		14%	33%	53%	19%	48%	9%	15%	68%	51%	49%	32%	19%	-%	29%	19%	29%	29%	-%	29%
No, have never switched	54	31	6	17	16	20	4	13	34	23	30	19	4	-	9	7	13	-	13	13
	26%	45%	10%	21%	40%	28%	7%	35%	25%	19%	35%	28%	8%	-%	16%	12%	17%	-%	100%	17%
		bc			f	f	f	f	lq	lq	ilnopqs	loq	q		q	q	q			q
		58%	11%	31%	29%	37%	7%	25%	64%	43%	57%	36%	7%	-%	18%	13%	24%	-%	24%	24%
Don't know	3	-	1	2	-	1	2	*	2	2	1	1	1	-	1	1	1	-	-	1
	1%	-%	2%	3%	-%	1%	3%	1%	2%	1%	1%	1%	2%	-%	3%	2%	2%	-%	-%	2%
		-%	34%	66%	-%	34%	53%	14%	74%	59%	41%	26%	34%	-%	47%	34%	47%	-%	-%	47%
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																				

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 39

## B4. Have you ever switched your (ISDN2/2e/ ISDN30) supplier? (SINGLE CODE)

Base : Those who (mostly) use ISN2/2e or ISDN30

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j	k	l	*m	n	o	p	q
Unweighted total	217	123	94	-	88	53	83	54	52	33	160	57	140	20	98	119	74	136
Effective Weighted Sample	165	83	91	-	60	37	80	53	44	29	127	39	115	14	78	87	51	123
Total	209	124	85	-	82	57	73	49	47	28	153	56	130	22	100	109	86	117
		59%	41%	-%	39%	27%	35%	23%	23%	13%	73%	27%	62%	11%	48%	52%	41%	56%
Yes, switched in the last year	33	26	7	-	24	3	13	10	14	1	32	1	30	1	16	17	15	18
	16%	21%	8%	-%	29%	5%	17%	20%	31%	3%	21%	2%	23%	5%	15%	16%	17%	15%
		b			ei			ei	ei		k							
		79%	21%	-%	72%	9%	38%	29%	44%	2%	96%	4%	92%	4%	47%	53%	46%	53%
Yes, switched one to two years ago	72	37	35	-	20	22	25	21	13	12	65	7	53	11	47	25	25	47
	34%	30%	41%	-%	24%	39%	35%	42%	28%	45%	42%	13%	41%	51%	47%	23%	29%	40%
					d			d	d		k				o			
		52%	48%	-%	28%	31%	35%	29%	18%	17%	90%	10%	74%	16%	65%	35%	35%	65%
Yes, switched three to four years ago	39	21	18	-	11	17	13	11	9	8	28	11	23	5	21	17	10	28
	19%	17%	21%	-%	14%	29%	18%	22%	19%	30%	18%	20%	18%	22%	21%	16%	11%	24%
		53%	47%	-%	29%	43%	34%	27%	24%	21%	72%	28%	59%	13%	55%	45%	25%	71%
Yes, switched more than four years ago	8	6	3	-	4	1	2	2	2	1	5	3	4	1	3	6	-	7
	4%	5%	3%	-%	5%	2%	3%	4%	3%	3%	3%	6%	3%	4%	3%	5%	-%	6%
		68%	32%	-%	51%	17%	28%	23%	19%	10%	61%	39%	52%	9%	33%	67%	-%	86%
No, have never switched	54	33	21	-	22	12	19	5	8	5	23	31	19	4	14	40	35	17
	26%	27%	25%	-%	27%	21%	26%	10%	16%	20%	15%	55%	15%	18%	14%	37%	40%	15%
					g		g				j				n		q	
		61%	39%	-%	42%	22%	35%	9%	14%	10%	43%	57%	36%	7%	25%	75%	65%	31%
Don't know	3	1	2	-	1	1	1	1	1	-	*	3	*	-	-	3	1	1
	1%	1%	2%	-%	1%	3%	1%	2%	3%	-%	*%	5%	*%	-%	-%	3%	2%	1%
					j						j							
		41%	59%	-%	27%	47%	26%	34%	47%	-%	14%	86%	14%	-%	-%	100%	47%	26%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 39**

## **B4. Have you ever switched your (ISDN2/2e/ ISDN30) supplier? (SINGLE CODE)**

Base : Those who (mostly) use ISN2/2e or ISDN30

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
	Total	NEVER			YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
		LAST YEAR	EVER	/DK															
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	*k	l	m	n	o	p	q	*r
Unweighted total	217	34	128	55	138	55	99	33	156	51	110	22	44	59	45	34	50	62	23
Effective Weighted Sample	165	25	107	37	107	39	72	25	121	41	81	15	36	55	40	28	45	53	20
Total	209	33	119	57	131	53	95	39	151	45	111	22	40	50	38	33	42	55	20
		16%	57%	27%	63%	25%	45%	19%	72%	21%	53%	11%	19%	24%	18%	16%	20%	26%	9%
Yes, switched in the last year	33	33	-	-	31	2	16	1	28	5	17	1	13	12	10	6	10	14	1
	16%	100%	-%	-%	23%	4%	17%	4%	18%	12%	15%	4%	32%	24%	27%	17%	23%	25%	6%
		bc			e														
		100%	-%	-%	93%	7%	50%	4%	84%	16%	51%	2%	38%	36%	31%	17%	30%	43%	4%
Yes, switched one to two years ago	72	-	72	-	57	10	38	8	64	6	44	2	15	16	9	17	9	21	4
	34%	-%	60%	-%	43%	19%	40%	20%	42%	14%	40%	8%	38%	33%	24%	51%	21%	38%	23%
			ac		e				i							p			
		-%	100%	-%	79%	14%	53%	11%	89%	9%	62%	3%	21%	23%	12%	23%	12%	29%	6%
Yes, switched three to four years ago	39	-	39	-	30	4	18	4	32	7	20	1	9	11	11	5	13	13	4
	19%	-%	33%	-%	23%	8%	19%	9%	21%	16%	18%	5%	22%	23%	30%	15%	30%	24%	21%
			ac																
		-%	100%	-%	76%	11%	46%	9%	82%	18%	53%	3%	23%	29%	29%	12%	32%	34%	11%
Yes, switched more than four years ago	8	-	8	-	6	1	2	4	5	3	4	2	*	2	2	2	*	2	-
	4%	-%	7%	-%	5%	1%	2%	9%	3%	8%	4%	7%	1%	3%	5%	6%	1%	4%	-%
		-%	100%	-%	72%	9%	28%	43%	59%	41%	52%	19%	5%	20%	24%	24%	5%	29%	-%
No, have never switched	54	-	-	54	8	36	19	22	21	21	25	15	3	8	5	4	9	5	8
	26%	-%	-%	95%	6%	67%	20%	55%	14%	48%	23%	69%	7%	17%	14%	11%	22%	8%	42%
				ab		d		f		h									
		-%	-%	100%	14%	66%	36%	40%	39%	40%	47%	29%	5%	16%	10%	7%	18%	9%	16%
Don't know	3	-	-	3	*	-	1	1	1	1	-	2	-	-	-	-	1	-	1
	1%	-%	-%	5%	-%	-%	1%	2%	1%	2%	-%	7%	-%	-%	-%	-%	2%	-%	7%
				b															
		-%	-%	100%	14%	-%	26%	27%	39%	34%	-%	53%	-%	-%	-%	-%	34%	-%	47%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r



# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 40**

## **B5. What prompted you to switch your (ISDN2/2e/ ISDN30) supplier? (MULTI CODE)**

Base : Those who have ever switched supplier for their (ISDN2/2e/ ISDN30) service

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION												
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP SWITCHED	IP NOT SWITCHED	ANY IP	
					£1M	£1M-£20M	£21M-£100M	OVER £100M										ISDN	ISDN		ISDN
Significance Level: 95%		*a	b	c	*d	e	f	g	h	i	j	k	l	*m	n	o	p	q	*r	s	
Unweighted total	162	26	46	89	21	49	56	33	108	109	53	54	55	-	53	52	67	67	-	67	
Effective Weighted Sample	131	21	45	84	15	41	51	30	81	106	35	52	54	-	44	51	58	58	-	58	
Total	152	37	54	61	24	49	49	25	103	96	55	49	47	-	47	47	61	61	-	61	
		25%	35%	40%	16%	33%	32%	16%	68%	64%	36%	32%	31%	-%	31%	31%	40%	40%	-%	40%	
Was offered a better deal (price)	87	21	29	37	14	26	28	20	63	57	31	25	32	-	28	31	36	36	-	36	
	58%	57%	54%	61%	56%	53%	57%	79%	61%	59%	55%	50%	68%	-%	61%	67%	59%	59%	-%	59%	
								ef													
		24%	33%	42%	16%	30%	32%	23%	72%	65%	35%	28%	37%	-%	32%	36%	41%	41%	-%	41%	
Was offered better quality of service	84	15	34	35	7	29	27	17	60	54	29	23	31	-	34	32	43	43	-	43	
	55%	40%	63%	57%	30%	59%	54%	67%	59%	56%	53%	47%	66%	-%	74%	68%	71%	71%	-%	71%	
															ik	k	k	k		k	
		18%	41%	42%	9%	35%	32%	20%	72%	65%	35%	28%	37%	-%	41%	38%	52%	52%	-%	52%	
Contract came to an end	64	16	22	26	9	14	25	12	40	45	19	24	21	-	21	25	29	29	-	29	
	42%	43%	41%	43%	39%	29%	51%	48%	39%	47%	34%	49%	45%	-%	46%	53%	48%	48%	-%	48%	
							e														
		25%	34%	41%	15%	22%	39%	18%	63%	70%	30%	37%	33%	-%	33%	38%	45%	45%	-%	45%	
Was offered a more attractive package/range of services	39	8	12	19	8	8	16	8	27	30	9	13	18	-	17	24	24	24	-	24	
	26%	23%	22%	31%	31%	15%	32%	33%	26%	32%	16%	25%	38%	-%	37%	50%	40%	40%	-%	40%	
													j		j	hijk	j	j		j	
		22%	31%	48%	19%	19%	40%	21%	68%	78%	22%	32%	45%	-%	44%	60%	62%	62%	-%	62%	
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																					

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 40

## B5. What prompted you to switch your (ISDN2/2e/ ISDN30) supplier? (MULTI CODE)

Base : Those who have ever switched supplier for their (ISDN2/2e/ ISDN30) service

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
Significance Level: 95%		a	b	*c	d	e	f	g	h	*i	j	*k	l	*m	n	o	p	q
Unweighted total	162	93	69	-	66	42	61	48	42	25	135	27	117	18	86	76	44	115
Effective Weighted Sample	131	68	67	-	50	32	59	47	35	22	109	23	96	13	69	63	32	104
Total	152	90	62	-	59	43	54	43	38	22	129	23	111	18	86	65	50	99
		59%	41%	-%	39%	29%	35%	28%	25%	15%	85%	15%	73%	12%	57%	43%	33%	65%
Was offered a better deal (price)	87	57	31	-	39	24	30	26	22	14	74	14	60	14	39	49	27	59
	58%	63%	49%	-%	65%	56%	57%	61%	57%	62%	57%	60%	54%	76%	45%	74%	54%	60%
		65%	35%	-%	44%	28%	35%	30%	25%	16%	85%	15%	68%	16%	44%	56%	31%	68%
Was offered better quality of service	84	50	33	-	35	25	28	26	29	14	72	12	66	6	49	35	20	63
	55%	56%	53%	-%	59%	58%	53%	60%	75%	64%	56%	51%	59%	33%	56%	53%	41%	63%
		60%	40%	-%	42%	30%	34%	31%	35%	17%	86%	14%	79%	7%	58%	42%	24%	75%
Contract came to an end	64	37	27	-	33	7	30	15	23	7	61	4	57	3	39	25	18	45
	42%	41%	44%	-%	56%	16%	57%	35%	59%	30%	47%	17%	52%	19%	45%	38%	37%	45%
		57%	43%	-%	eg	11%	eg	23%	eg	10%	94%	6%	89%	5%	61%	39%	29%	70%
Was offered a more attractive package/range of services	39	20	20	-	14	12	15	16	16	8	34	6	30	4	23	17	12	27
	26%	22%	31%	-%	25%	28%	27%	37%	42%	38%	26%	25%	27%	19%	26%	25%	25%	27%
		50%	50%	-%	37%	31%	37%	40%	41%	22%	86%	14%	77%	9%	58%	42%	31%	69%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 40

## B5. What prompted you to switch your (ISDN2/2e/ ISDN30) supplier? (MULTI CODE)

Base : Those who have ever switched supplier for their (ISDN2/2e/ ISDN30) service

	SWITCHING ISDN SUPPLIER				CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
	Total	NEVER			YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
		LAST YEAR	EVER	/DK															
Significance Level: 95%		a	b	*c	d	*e	f	*g	h	*i	j	*k	l	m	n	o	p	q	*r
Unweighted total	162	34	128	-	129	22	80	15	134	27	89	6	41	49	39	30	37	55	12
Effective Weighted Sample	131	25	107	-	103	19	60	14	107	24	69	5	34	46	35	24	35	47	10
Total	152	33	119	-	123	17	75	17	128	22	86	5	37	41	33	29	32	51	10
		22%	78%	-%	81%	11%	49%	11%	85%	15%	57%	3%	24%	27%	21%	19%	21%	33%	7%
Was offered a better deal (price)	87	21	66	-	68	10	41	10	71	15	48	4	23	26	21	16	20	30	5
	58%	65%	55%	-%	55%	57%	55%	62%	55%	69%	56%	70%	62%	62%	65%	55%	62%	60%	53%
		24%	76%	-%	78%	11%	47%	12%	81%	18%	55%	4%	26%	29%	24%	18%	22%	35%	6%
Was offered better quality of service	84	20	63	-	68	10	32	8	70	12	38	2	30	30	21	22	22	36	7
	55%	61%	53%	-%	56%	56%	43%	50%	55%	53%	44%	42%	81%	72%	65%	75%	68%	71%	73%
		24%	76%	-%	82%	12%	38%	10%	84%	14%	46%	3%	36%	35%	25%	26%	26%	43%	9%
Contract came to an end	64	24	40	-	59	2	32	4	54	10	34	1	18	22	15	12	18	25	4
	42%	73%	34%	-%	48%	13%	42%	21%	42%	46%	40%	15%	49%	53%	47%	41%	55%	50%	38%
		b																	
		38%	62%	-%	92%	3%	49%	6%	84%	16%	53%	1%	28%	34%	24%	18%	27%	39%	6%
Was offered a more attractive package/range of services	39	11	28	-	35	4	10	5	32	7	14	*	16	21	14	10	15	23	2
	26%	34%	24%	-%	29%	22%	14%	27%	25%	32%	17%	8%	42%	50%	42%	34%	46%	45%	16%
		28%	72%	-%	90%	10%	26%	11%	82%	18%	37%	1%	40%	53%	35%	25%	37%	58%	4%
Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																			

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 41

B6. Are you currently considering switching away from (ISDN2/2e/ ISDN30)? NOTE: This is changing away from the service not just a different supplier. (SINGLE CODE)

Base : Those who (mostly) use ISN2/2e or ISDN30

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION													
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP SWITCHED	IP NOT SWITCHED	ANY IP		
					£1M	£1M-£20M	£21M-£100M	OVER £100M										ISDN	ISDN			
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	*m	n	o	p	q	*r	s		
Unweighted total	217	44	52	120	30	67	64	52	141	137	80	76	61	-	67	61	85	67	16	85		
Effective Weighted Sample	165	35	51	112	21	53	58	46	98	133	49	74	60	-	55	60	73	58	14	73		
Total	209	68	61	79	40	70	54	39	139	122	87	70	52	-	57	54	75	61	13	75		
		33%	29%	38%	19%	34%	26%	19%	67%	58%	42%	33%	25%	-%	28%	26%	36%	29%	6%	36%		
Yes	131	36	41	55	22	41	41	23	91	83	48	41	43	-	44	43	55	53	2	55		
	63%	52%	68%	69%	56%	59%	76%	59%	65%	68%	55%	58%	82%	-%	76%	79%	73%	87%	12%	73%		
		27%	31%	42%	17%	32%	31%	17%	69%	63%	37%	31%	hjk 33%	-%	jk 33%	jk 33%	j 42%	hijk 40%	1%	j 42%		
No	53	24	10	19	13	22	6	10	33	26	27	20	6	-	10	8	14	5	9	14		
	25%	35%	17%	24%	34%	32%	11%	25%	23%	21%	31%	29%	11%	-%	17%	15%	19%	8%	72%	19%		
		45%	20%	36%	f 25%	f 42%	11%	18%	q 62%	q 49%	lq 51%	loq 38%	11%	-%	19%	15%	27%	10%	18%	27%		
Don't know	25	9	9	6	4	7	7	6	16	12	12	9	4	-	4	4	6	3	2	6		
	12%	13%	15%	8%	11%	10%	13%	16%	11%	10%	14%	12%	7%	-%	7%	7%	8%	5%	15%	8%		
		37%	38%	25%	17%	28%	29%	26%	65%	50%	50%	35%	15%	-%	17%	15%	24%	12%	8%	24%		

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 41

B6. Are you currently considering switching away from (ISDN2/2e/ ISDN30)? NOTE: This is changing away from the service not just a different supplier. (SINGLE CODE)

Base : Those who (mostly) use ISN2/2e or ISDN30

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j	k	l	*m	n	o	p	q
Unweighted total	217	123	94	-	88	53	83	54	52	33	160	57	140	20	98	119	74	136
Effective Weighted Sample	165	83	91	-	60	37	80	53	44	29	127	39	115	14	78	87	51	123
Total	209	124	85	-	82	57	73	49	47	28	153	56	130	22	100	109	86	117
		59%	41%	-%	39%	27%	35%	23%	23%	13%	73%	27%	62%	11%	48%	52%	41%	56%
Yes	131	79	53	-	52	39	51	32	38	16	114	17	102	12	75	56	47	84
	63%	64%	62%	-%	63%	68%	69%	67%	81%	59%	74%	31%	78%	54%	75%	52%	54%	72%
		60%	40%	-%	40%	29%	39%	25%	29%	12%	87%	13%	78%	9%	57%	43%	35%	64%
No	53	31	22	-	26	7	15	11	7	7	26	27	18	8	16	37	31	20
	25%	25%	26%	-%	31%	12%	20%	23%	15%	26%	17%	49%	14%	34%	16%	34%	36%	17%
		59%	41%	-%	48%	13%	28%	22%	14%	14%	48%	52%	34%	14%	30%	70%	58%	38%
Don't know	25	14	11	-	5	11	8	5	2	4	13	11	11	3	9	15	9	12
	12%	11%	12%	-%	6%	20%	10%	10%	4%	15%	9%	20%	8%	13%	9%	14%	11%	10%
		57%	43%	-%	19%	46%	31%	19%	7%	17%	55%	45%	43%	11%	38%	62%	37%	49%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 41

**B6. Are you currently considering switching away from (ISDN2/2e/ ISDN30)?** NOTE: This is changing away from the service not just a different supplier. (SINGLE CODE)

Base : Those who (mostly) use ISN2/2e or ISDN30

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO		YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
									3 YEARS	4+ YEARS									
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	*k	l	m	n	o	p	q	*r
Unweighted total	217	34	128	55	138	55	99	33	156	51	110	22	44	59	45	34	50	62	23
Effective Weighted Sample	165	25	107	37	107	39	72	25	121	41	81	15	36	55	40	28	45	53	20
Total	209	33	119	57	131	53	95	39	151	45	111	22	40	50	38	33	42	55	20
		16%	57%	27%	63%	25%	45%	19%	72%	21%	53%	11%	19%	24%	18%	16%	20%	26%	9%
Yes	131	31	92	8	131	-	70	6	113	17	75	2	34	38	30	24	30	48	6
	63%	93%	78%	14%	100%	-%	74%	16%	75%	39%	67%	9%	86%	76%	80%	75%	71%	88%	32%
		c	c	e	g			i											
		23%	70%	6%	100%	-%	54%	5%	86%	13%	57%	2%	26%	29%	23%	18%	23%	37%	5%
No	53	2	15	36	-	53	18	20	26	23	27	11	4	10	5	6	8	4	10
	25%	7%	13%	63%	-%	100%	19%	52%	17%	51%	25%	49%	11%	20%	13%	20%	19%	8%	52%
				ab	d	f		h											
		4%	29%	67%	-%	100%	34%	38%	49%	43%	52%	21%	8%	18%	10%	12%	15%	8%	19%
Don't know	25	-	11	13	-	-	6	12	12	4	9	9	1	2	3	2	4	3	3
	12%	-%	10%	23%	-%	-%	7%	32%	8%	10%	8%	42%	3%	5%	7%	6%	10%	5%	16%
				ab				f											
		-%	47%	53%	-%	-%	26%	50%	48%	18%	38%	38%	4%	9%	11%	7%	17%	11%	13%
Columns Tested:	a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																		

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 42**

## **B7A. Why would you not consider switching from (ISDN2/2e/ ISDN30)? (MULTI CODE)**

Base : Those who (mostly) use ISN2/2e or ISDN30 and who are not currently considering switching away from the main ISDN service used

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											IP SWITCHED		IP NOT SWITCHED		ANY IP
	Total				UNDER				ISDN2	ISDN30		ISDN2 ONLY	ISDN30		IP NOT ISDN	ISDN30		ISDN & IP	ISDN & IP	ISDN	ISDN			
		1-49	50-249	250+	£1M	£1M-£20M	£21M-£100M	OVER £100M		ONLY	BOTH ISDN		ONLY	ONLY		ONLY	ONLY					ONLY	ONLY	
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q	r	s				
Unweighted total	55	15	9	31	11	19	10	13	33	29	26	22	7	-	10	9	15	5	10	15				
Effective Weighted Sample	39	12	9	28	8	14	9	11	20	28	15	22	7	-	9	9	14	5	9	14				
Total	53	24	10	19	13	22	6	10	33	26	27	20	6	-	10	8	14	5	9	14				
		45%	20%	36%	25%	42%	11%	18%	62%	49%	51%	38%	11%	-%	19%	15%	27%	10%	18%	27%				
Tied to long term contract	18	6	7	5	2	9	2	4	11	9	9	6	2	-	6	4	8	2	5	8				
	34%	25%	67%	27%	18%	42%	39%	39%	35%	34%	34%	32%	41%	-%	59%	45%	54%	48%	57%	54%				
		33%	38%	29%	14%	52%	13%	21%	64%	49%	51%	36%	13%	-%	32%	20%	44%	13%	30%	44%				
Good contacts at existing company	17	5	3	9	3	6	2	6	10	8	9	7	2	-	5	2	6	2	4	6				
	32%	21%	27%	49%	24%	26%	40%	58%	31%	32%	32%	34%	27%	-%	51%	20%	40%	31%	45%	40%				
		29%	16%	55%	19%	34%	14%	33%	60%	50%	50%	40%	9%	-%	29%	9%	34%	9%	25%	34%				
Hassle	16	11	2	3	5	8	1	1	11	7	10	5	2	-	1	2	2	-	2	2				
	31%	45%	23%	17%	38%	38%	20%	8%	34%	25%	36%	25%	27%	-%	8%	23%	13%	-%	19%	13%				
		65%	15%	20%	31%	52%	7%	5%	69%	41%	59%	31%	10%	-%	5%	11%	11%	-%	11%	11%				
Easier to manage one supplier	16	6	2	8	5	3	2	6	11	8	7	5	3	-	7	5	9	3	6	9				
	29%	23%	23%	40%	34%	15%	26%	64%	32%	32%	27%	24%	59%	-%	72%	62%	60%	52%	64%	60%				
		36%	16%	49%	29%	21%	10%	40%	68%	54%	46%	32%	22%	-%	45%	32%	56%	17%	39%	56%				
Current service features are what we need	11	5	3	3	4	4	*	2	8	4	8	4	-	-	2	1	3	-	3	3				
	21%	22%	27%	17%	32%	18%	7%	19%	23%	14%	28%	18%	-%	-%	18%	12%	19%	-%	30%	19%				
		46%	25%	29%	38%	36%	4%	16%	67%	33%	67%	33%	-%	-%	16%	9%	25%	-%	25%	25%				
Current supplier(s) understand our business	10	2	4	4	1	6	1	1	7	4	7	3	1	-	4	2	5	2	2	5				
	19%	10%	37%	22%	10%	29%	20%	13%	23%	14%	25%	14%	14%	-%	36%	23%	32%	43%	26%	32%				
		23%	37%	40%	14%	62%	12%	12%	73%	35%	65%	27%	8%	-%	35%	18%	45%	21%	24%	45%				
Price of alternative services too high	10	4	2	4	4	4	2	1	7	4	5	3	2	-	3	2	3	2	1	3				
	19%	18%	20%	19%	28%	16%	27%	8%	22%	17%	20%	13%	32%	-%	33%	23%	22%	36%	15%	22%				
		43%	21%	37%	39%	37%	16%	8%	74%	45%	55%	26%	18%	-%	33%	18%	33%	18%	14%	33%				
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																								

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 42**

## **B7A. Why would you not consider switching from (ISDN2/2e/ ISDN30)? (MULTI CODE)**

Base : Those who (mostly) use ISN2/2e or ISDN30 and who are not currently considering switching away from the main ISDN service used

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											
	Total	1-49 *a	50-249 *b	250+ c	UNDER				ISDN2 h	ISDN30 *i	ISDN2 ONLY *j	ISDN30 ONLY *k	BOTH ISDN *l	IP NOT ISDN *m	ISDN2 & IP *n	ISDN30 & IP *o	ISDN & IP *p	IP SWITCHED	IP NOT SWITCHED	ANY IP *s
					£1M *d	£1M- £20M *e	£21M-£100M *f	OVER £100M *g										ISDN	ISDN	
Significance Level: 95%																				
Unweighted total	55	15	9	31	11	19	10	13	33	29	26	22	7	-	10	9	15	5	10	15
Effective Weighted Sample	39	12	9	28	8	14	9	11	20	28	15	22	7	-	9	9	14	5	9	14
Total	53	24	10	19	13	22	6	10	33	26	27	20	6	-	10	8	14	5	9	14
		45%	20%	36%	25%	42%	11%	18%	62%	49%	51%	38%	11%	-%	19%	15%	27%	10%	18%	27%
Was offered a more attractive package/range of services	9	1	5	3	-	6	1	2	5	6	4	4	2	-	4	4	6	3	3	6
	17%	5%	47%	17%	-%	28%	13%	23%	16%	21%	14%	19%	27%	-%	44%	45%	44%	64%	34%	44%
		12%	53%	35%	-%	68%	9%	24%	57%	61%	39%	43%	17%	-%	48%	40%	70%	35%	35%	70%
Historic links to existing company(s)	5	2	1	2	1	2	*	1	4	3	2	1	2	-	3	2	3	1	2	3
	10%	10%	10%	9%	10%	9%	7%	13%	12%	11%	8%	5%	32%	-%	33%	23%	22%	20%	23%	22%
		47%	20%	32%	28%	40%	8%	24%	80%	56%	44%	20%	36%	-%	64%	36%	64%	20%	43%	64%
High internal costs associated with switching	4	-	1	3	-	2	*	1	4	2	3	-	2	-	2	1	2	1	1	2
	8%	-%	13%	15%	-%	8%	7%	13%	13%	6%	10%	-%	27%	-%	22%	10%	15%	28%	8%	15%
		-%	33%	67%	-%	43%	10%	29%	100%	37%	63%	-%	37%	-%	52%	19%	52%	33%	19%	52%
Alternatives not reliable enough	3	-	-	3	-	1	1	1	2	2	1	1	1	-	1	1	1	1	*	1
	5%	-%	-%	15%	-%	5%	13%	9%	6%	6%	5%	4%	14%	-%	12%	10%	8%	16%	4%	8%
		-%	-%	100%	-%	43%	28%	30%	72%	56%	44%	28%	28%	-%	43%	28%	43%	28%	15%	43%
Other	1	1	-	-	-	1	-	-	-	1	-	1	-	-	-	1	1	-	1	1
	2%	4%	-%	-%	-%	4%	-%	-%	-%	4%	-%	5%	-%	-%	-%	12%	7%	-%	11%	7%
		100%	-%	-%	-%	100%	-%	-%	-%	100%	-%	100%	-%	-%	-%	100%	100%	-%	100%	100%
Don't know	3	3	-	-	-	3	-	-	3	-	3	-	-	-	-	-	-	-	-	-
	6%	13%	-%	-%	-%	14%	-%	-%	10%	-%	12%	-%	-%	-%	-%	-%	-%	-%	-%	-%
		100%	-%	-%	-%	100%	-%	-%	100%	-%	100%	-%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s



# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 42**

## **B7A. Why would you not consider switching from (ISDN2/2e/ ISDN30)? (MULTI CODE)**

Base : Those who (mostly) use ISN2/2e or ISDN30 and who are not currently considering switching away from the main ISDN service used

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	*b	*c	*d	*e	*f	*g	*h	*i	*j	*k	*l	*m	*n	o	*p	*q
Significance Level: 95%																		
Unweighted total	55	31	24	-	26	7	17	12	7	8	27	28	21	6	17	38	27	26
Effective Weighted Sample	39	19	24	-	17	4	17	12	6	7	20	19	18	4	15	25	19	22
Total	53	31	22	-	26	7	15	11	7	7	26	27	18	8	16	37	31	20
		59%	41%	-%	48%	13%	28%	22%	14%	14%	48%	52%	34%	14%	30%	70%	58%	38%
Tied to long term contract	18	10	8	-	11	-	4	5	4	4	10	8	6	4	7	11	12	6
	34%	32%	37%	-%	45%	-%	28%	41%	53%	55%	39%	29%	33%	52%	42%	31%	38%	28%
		55%	45%	-%	64%	-%	23%	26%	21%	22%	55%	45%	33%	22%	37%	63%	65%	31%
Good contacts at existing company	17	10	7	-	10	*	5	4	6	-	11	6	8	3	5	12	8	9
	32%	33%	31%	-%	38%	6%	32%	32%	80%	-%	44%	21%	45%	40%	29%	33%	24%	43%
		60%	40%	-%	57%	2%	28%	22%	34%	-%	66%	34%	48%	18%	27%	73%	44%	51%
Hassle	16	11	5	-	9	3	6	1	1	1	7	9	2	5	3	13	10	4
	31%	36%	23%	-%	33%	37%	38%	9%	14%	11%	26%	35%	12%	60%	18%	36%	34%	19%
		69%	31%	-%	53%	16%	35%	6%	6%	5%	41%	59%	14%	28%	17%	83%	65%	24%
Easier to manage one supplier	16	10	6	-	7	4	7	2	5	4	9	7	8	1	3	13	9	6
	29%	32%	26%	-%	27%	51%	44%	16%	66%	53%	35%	24%	45%	11%	16%	35%	30%	31%
		63%	37%	-%	45%	23%	42%	12%	31%	25%	58%	42%	53%	5%	17%	83%	59%	41%
Current service features are what we need	11	8	4	-	4	3	4	-	2	1	4	7	4	-	-	11	6	4
	21%	24%	17%	-%	17%	45%	25%	-%	25%	14%	16%	27%	22%	-%	-%	30%	19%	21%
		67%	33%	-%	40%	28%	33%	-%	16%	9%	36%	64%	36%	-%	-%	100%	53%	37%
Current supplier(s) understand our business	10	7	3	-	7	*	2	2	3	1	5	5	5	-	3	8	6	4
	19%	24%	13%	-%	28%	6%	12%	16%	45%	19%	19%	20%	27%	-%	16%	21%	21%	19%
		73%	27%	-%	69%	4%	18%	17%	31%	14%	47%	53%	47%	-%	25%	75%	63%	37%
Price of alternative services too high	10	7	3	-	7	*	2	3	2	1	6	4	5	*	4	6	5	5
	19%	23%	12%	-%	27%	6%	11%	25%	30%	14%	23%	15%	30%	6%	27%	15%	15%	26%
		74%	26%	-%	69%	4%	16%	29%	22%	10%	59%	41%	55%	4%	43%	57%	47%	53%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 42**

## **B7A. Why would you not consider switching from (ISDN2/2e/ ISDN30)? (MULTI CODE)**

Base : Those who (mostly) use ISN2/2e or ISDN30 and who are not currently considering switching away from the main ISDN service used

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
Significance Level: 95%		a	*b	*c	*d	*e	*f	*g	*h	*i	*j	*k	*l	*m	*n	o	*p	*q
Unweighted total	55	31	24	-	26	7	17	12	7	8	27	28	21	6	17	38	27	26
Effective Weighted Sample	39	19	24	-	17	4	17	12	6	7	20	19	18	4	15	25	19	22
Total	53	31	22	-	26	7	15	11	7	7	26	27	18	8	16	37	31	20
		59%	41%	-%	48%	13%	28%	22%	14%	14%	48%	52%	34%	14%	30%	70%	58%	38%
Was offered a more attractive package/range of services	9	4	5	-	5	-	3	3	3	3	4	5	4	-	4	5	4	5
	17%	14%	22%	-%	20%	-%	18%	26%	44%	44%	16%	19%	22%	-%	27%	13%	13%	26%
		48%	52%	-%	57%	-%	28%	32%	35%	35%	44%	56%	44%	-%	47%	53%	43%	57%
Historic links to existing company(s)	5	3	2	-	4	-	2	1	1	2	3	2	3	-	1	4	3	2
	10%	11%	8%	-%	16%	-%	12%	9%	19%	25%	13%	7%	18%	-%	9%	10%	11%	9%
		65%	35%	-%	80%	-%	35%	20%	28%	36%	65%	35%	65%	-%	29%	71%	65%	35%
High internal costs associated with switching	4	3	1	-	3	1	2	-	-	2	2	2	2	-	2	2	-	4
	8%	11%	4%	-%	12%	17%	11%	-%	-%	30%	7%	9%	10%	-%	11%	7%	-%	21%
		81%	19%	-%	71%	29%	37%	-%	-%	52%	43%	57%	43%	-%	43%	57%	-%	100%
Alternatives not reliable enough	3	2	1	-	2	*	1	1	1	*	1	2	1	-	1	2	2	1
	5%	7%	4%	-%	6%	6%	5%	7%	11%	6%	5%	6%	7%	-%	5%	6%	5%	6%
		72%	28%	-%	57%	15%	28%	28%	28%	15%	43%	57%	43%	-%	28%	72%	57%	43%
Other	1	-	1	-	-	-	1	-	-	1	1	-	1	-	-	1	1	-
	2%	-%	5%	-%	-%	-%	7%	-%	-%	14%	4%	-%	5%	-%	-%	3%	3%	-%
		-%	100%	-%	-%	-%	100%	-%	-%	100%	100%	-%	100%	-%	-%	100%	100%	-%
Don't know	3	3	-	-	3	-	-	-	-	-	-	3	-	-	-	3	3	-
	6%	10%	-%	-%	12%	-%	-%	-%	-%	-%	-%	11%	-%	-%	-%	8%	10%	-%
		100%	-%	-%	100%	-%	-%	-%	-%	-%	-%	100%	-%	-%	-%	100%	100%	-%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 42**

## **B7A. Why would you not consider switching from (ISDN2/2e/ ISDN30)? (MULTI CODE)**

Base : Those who (mostly) use ISN2/2e or ISDN30 and who are not currently considering switching away from the main ISDN service used

	SWITCHING ISDN SUPPLIER				CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
	NEVER				YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
	Total	LAST YEAR	EVER	/DK															
Significance Level: 95%		*a	*b	c	*d	e	*f	*g	*h	*i	*j	*k	*l	*m	*n	*o	*p	*q	*r
Unweighted total	55	2	20	33	-	55	23	17	29	24	29	11	5	10	5	7	8	5	10
Effective Weighted Sample	39	2	17	23	-	39	15	12	21	18	19	7	4	9	5	7	7	4	9
Total	53	2	15	36	-	53	18	20	26	23	27	11	4	10	5	6	8	4	10
		4%	29%	67%	-%	100%	34%	38%	49%	43%	52%	21%	8%	18%	10%	12%	15%	8%	19%
Tied to long term contract	18	1	5	12	-	18	2	8	11	7	6	4	1	5	3	3	5	2	6
	34%	64%	31%	34%	-%	34%	12%	39%	43%	30%	23%	35%	32%	55%	69%	44%	62%	52%	55%
		8%	26%	66%	-%	100%	12%	44%	62%	38%	35%	22%	8%	30%	19%	16%	28%	12%	31%
Good contacts at existing company	17	2	5	10	-	17	7	5	9	8	9	2	3	4	2	2	4	3	3
	32%	100%	33%	27%	-%	32%	36%	22%	36%	34%	32%	22%	68%	45%	43%	24%	52%	71%	27%
		13%	30%	57%	-%	100%	39%	27%	54%	46%	52%	14%	18%	26%	13%	9%	25%	18%	16%
Hassle	16	1	2	13	-	16	3	11	10	6	9	6	-	2	1	1	1	1	1
	31%	64%	15%	35%	-%	31%	17%	56%	37%	24%	32%	51%	-%	19%	20%	16%	10%	19%	10%
		9%	14%	78%	-%	100%	19%	70%	59%	34%	54%	35%	-%	11%	6%	6%	5%	5%	6%
Easier to manage one supplier	16	1	2	12	-	16	4	3	5	11	5	2	2	6	2	3	5	3	6
	29%	36%	15%	35%	-%	29%	21%	15%	18%	47%	19%	16%	45%	65%	31%	53%	65%	67%	57%
		5%	14%	80%	-%	100%	24%	20%	30%	70%	33%	11%	13%	41%	10%	22%	34%	18%	38%
Current service features are what we need	11	1	1	9	-	11	1	7	3	7	5	4	1	2	-	1	2	*	2
	21%	64%	8%	24%	-%	21%	7%	36%	13%	30%	18%	32%	32%	24%	-%	15%	23%	10%	23%
		12%	11%	77%	-%	100%	11%	64%	29%	61%	44%	31%	13%	21%	-%	9%	16%	4%	21%
Current supplier(s) understand our business	10	2	3	5	-	10	2	4	6	4	4	2	1	5	2	2	3	1	4
	19%	100%	17%	15%	-%	19%	9%	20%	24%	18%	15%	15%	18%	47%	36%	28%	35%	19%	37%
		21%	26%	53%	-%	100%	16%	39%	61%	39%	39%	16%	8%	45%	18%	18%	27%	8%	37%
Price of alternative services too high	10	1	3	6	-	10	4	2	4	6	4	3	1	2	1	2	1	1	2
	19%	36%	22%	16%	-%	19%	24%	11%	16%	25%	13%	27%	18%	22%	16%	28%	18%	19%	24%
		8%	34%	58%	-%	100%	45%	22%	41%	59%	37%	30%	8%	22%	8%	18%	14%	8%	25%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 42**

## **B7A. Why would you not consider switching from (ISDN2/2e/ ISDN30)? (MULTI CODE)**

Base : Those who (mostly) use ISN2/2e or ISDN30 and who are not currently considering switching away from the main ISDN service used

	SWITCHING ISDN SUPPLIER				CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
	NEVER				YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
	Total	LAST YEAR	EVER	/DK															
Significance Level: 95%		*a	*b	c	*d	e	*f	*g	*h	*i	*j	*k	*l	*m	*n	*o	*p	*q	*r
Unweighted total	55	2	20	33	-	55	23	17	29	24	29	11	5	10	5	7	8	5	10
Effective Weighted Sample	39	2	17	23	-	39	15	12	21	18	19	7	4	9	5	7	7	4	9
Total	53	2	15	36	-	53	18	20	26	23	27	11	4	10	5	6	8	4	10
		4%	29%	67%	-%	100%	34%	38%	49%	43%	52%	21%	8%	18%	10%	12%	15%	8%	19%
Was offered a more attractive package/range of services	9	1	3	5	-	9	1	2	5	4	2	1	1	5	3	4	3	1	6
	17%	36%	21%	14%	-%	17%	5%	9%	19%	18%	7%	7%	18%	55%	57%	56%	35%	19%	55%
		9%	36%	56%	-%	100%	9%	21%	54%	46%	21%	9%	9%	59%	31%	40%	30%	9%	61%
Historic links to existing company(s)	5	-	1	4	-	5	2	-	2	3	1	1	-	2	-	2	1	-	3
	10%	-%	10%	10%	-%	10%	10%	-%	9%	12%	3%	9%	-%	22%	-%	28%	18%	-%	31%
		-%	29%	71%	-%	100%	36%	-%	44%	56%	17%	20%	-%	43%	-%	36%	28%	-%	64%
High internal costs associated with switching	4	-	3	2	-	4	2	*	4	-	2	*	-	2	-	1	1	-	2
	8%	-%	17%	4%	-%	8%	9%	2%	16%	-%	6%	4%	-%	22%	-%	12%	17%	-%	21%
		-%	63%	37%	-%	100%	38%	10%	100%	-%	38%	10%	-%	52%	-%	19%	33%	-%	52%
Alternatives not reliable enough	3	1	*	2	-	3	1	1	2	1	1	1	1	1	1	1	*	1	*
	5%	36%	3%	5%	-%	5%	5%	4%	6%	5%	3%	7%	18%	12%	16%	12%	5%	19%	4%
		28%	15%	57%	-%	100%	30%	28%	57%	43%	30%	28%	28%	43%	28%	28%	15%	28%	15%
Other	1	-	-	1	-	1	-	-	1	-	-	-	1	1	-	1	-	-	1
	2%	-%	-%	3%	-%	2%	-%	-%	4%	-%	-%	-%	23%	10%	-%	15%	-%	-%	10%
		-%	-%	100%	-%	100%	-%	-%	100%	-%	-%	-%	100%	100%	-%	100%	-%	-%	100%
Don't know	3	-	-	3	-	3	3	-	-	-	3	-	-	-	-	-	-	-	-
	6%	-%	-%	9%	-%	6%	17%	-%	-%	-%	11%	-%	-%	-%	-%	-%	-%	-%	-%
		-%	-%	100%	-%	100%	100%	-%	-%	-%	100%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 43**

## **B7B. And what is the main reason you have for not considering switching from (ISDN2/2e/ ISDN30)? (SINGLE CODE)**

Base : Those who (mostly) use ISN2/2e or ISDN30 and who are not currently considering switching away from the main ISDN service used

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION													
	Total	UNDER			OVER				ISDN2	ISDN30		ISDN2 ONLY	ISDN30		IP NOT ISDN	ISDN2 & IP		ISDN30 & IP	IP SWITCHED		IP NOT SWITCHED	ANY IP
		1-49	50-249	250+	£1M	£1M-£20M	£21M-£100M	£100M		ONLY	BOTH		ONLY	BOTH		ISDN	ISDN		ISDN	ISDN		
Significance Level: 95%		*a	*b	c	*d	*e	*f	*g	h	*i	*j	*k	*l	*m	*n	*o	*p	*q	*r	*s		
Unweighted total	55	15	9	31	11	19	10	13	33	29	26	22	7	-	10	9	15	5	10	15		
Effective Weighted Sample	39	12	9	28	8	14	9	11	20	28	15	22	7	-	9	9	14	5	9	14		
Total	53	24	10	19	13	22	6	10	33	26	27	20	6	-	10	8	14	5	9	14		
		45%	20%	36%	25%	42%	11%	18%	62%	49%	51%	38%	11%	-%	19%	15%	27%	10%	18%	27%		
Good contacts at existing company	8	2	-	5	2	2	1	3	3	5	3	4	1	-	1	1	2	1	1	2		
	14%	10%	-%	28%	14%	9%	13%	31%	11%	19%	10%	20%	14%	-%	14%	10%	15%	16%	15%	15%		
		32%	-%	68%	24%	26%	10%	39%	45%	65%	35%	55%	10%	-%	18%	10%	29%	10%	18%	29%		
Tied to long term contract	7	-	4	2	1	3	2	1	2	5	1	5	1	-	1	1	2	1	1	2		
	13%	-%	43%	13%	8%	16%	26%	8%	7%	21%	5%	23%	14%	-%	14%	13%	17%	28%	11%	17%		
		-%	65%	35%	15%	50%	23%	12%	32%	80%	20%	68%	12%	-%	20%	15%	35%	20%	15%	35%		
Current service features are what we need	7	4	-	2	4	1	*	*	4	3	4	3	-	-	*	-	*	-	*	*		
	13%	18%	-%	13%	32%	4%	7%	4%	12%	10%	15%	13%	-%	-%	4%	-%	3%	-%	4%	3%		
		64%	-%	36%	64%	12%	6%	6%	59%	41%	59%	41%	-%	-%	6%	-%	6%	-%	6%	6%		
Hassle	7	7	-	-	3	4	-	-	5	2	5	2	-	-	-	-	-	-	-	-		
	13%	28%	-%	-%	19%	18%	-%	-%	14%	8%	17%	10%	-%	-%	-%	-%	-%	-%	-%	-%		
		100%	-%	-%	38%	62%	-%	-%	68%	32%	68%	32%	-%	-%	-%	-%	-%	-%	-%	-%		
Was offered a more attractive package/range of services	5	1	2	2	-	3	-	2	3	3	2	2	1	-	2	2	3	1	2	3		
	10%	5%	23%	9%	-%	13%	-%	23%	9%	11%	8%	11%	14%	-%	22%	23%	22%	20%	23%	22%		
		22%	47%	31%	-%	58%	-%	42%	58%	57%	43%	42%	15%	-%	42%	35%	62%	20%	42%	62%		
Price of alternative services too high	5	3	1	1	2	1	1	-	4	1	4	1	-	-	-	-	-	-	-	-		
	9%	12%	10%	4%	18%	6%	14%	-%	11%	4%	14%	5%	-%	-%	-%	-%	-%	-%	-%	-%		
		60%	22%	18%	52%	30%	18%	-%	78%	22%	78%	22%	-%	-%	-%	-%	-%	-%	-%	-%		
Current supplier(s) understand our business	4	1	1	2	1	1	1	*	4	1	4	-	1	-	2	1	2	1	1	2		
	8%	6%	13%	9%	10%	6%	20%	4%	14%	3%	14%	-%	14%	-%	22%	10%	15%	16%	15%	15%		
		32%	32%	37%	32%	32%	27%	9%	100%	18%	82%	-%	18%	-%	50%	18%	50%	18%	32%	50%		

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 43**

**B7B. And what is the main reason you have for not considering switching from (ISDN2/2e/ ISDN30)? (SINGLE CODE)**

Base : Those who (mostly) use ISN2/2e or ISDN30 and who are not currently considering switching away from the main ISDN service used

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											IP SWITCHED		IP NOT SWITCHED		ANY IP
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	ISDN	ISDN					
					£1M	£1M-£20M	£21M-£100M	£100M																
Significance Level: 95%		*a	*b	c	*d	*e	*f	*g	h	*i	*j	*k	*l	*m	*n	*o	*p	*q	*r	*s				
Unweighted total	55	15	9	31	11	19	10	13	33	29	26	22	7	-	10	9	15	5	10	15				
Effective Weighted Sample	39	12	9	28	8	14	9	11	20	28	15	22	7	-	9	9	14	5	9	14				
Total	53	24	10	19	13	22	6	10	33	26	27	20	6	-	10	8	14	5	9	14				
		45%	20%	36%	25%	42%	11%	18%	62%	49%	51%	38%	11%	-%	19%	15%	27%	10%	18%	27%				
Historic links to existing company(s)	3	1	1	1	-	2	*	*	2	2	1	1	1	-	1	1	1	1	-	1				
	5%	4%	10%	4%	-%	9%	7%	4%	6%	8%	3%	5%	18%	-%	10%	13%	7%	20%	-%	7%				
		35%	36%	29%	-%	71%	15%	15%	65%	71%	29%	35%	36%	-%	36%	36%	36%	36%	-%	36%				
Easier to manage one supplier	3	-	-	3	-	-	1	2	1	2	*	2	1	-	1	2	2	-	2	2				
	5%	-%	-%	15%	-%	-%	13%	21%	4%	9%	2%	8%	14%	-%	12%	20%	14%	-%	21%	14%				
		-%	-%	100%	-%	-%	28%	72%	43%	85%	15%	57%	28%	-%	43%	57%	72%	-%	72%	72%				
High internal costs associated with switching	1	-	-	1	-	-	-	*	1	1	*	-	1	-	-	-	-	-	-	-				
	2%	-%	-%	6%	-%	-%	-%	4%	4%	3%	2%	-%	14%	-%	-%	-%	-%	-%	-%	-%				
		-%	-%	100%	-%	-%	-%	35%	100%	65%	35%	-%	65%	-%	-%	-%	-%	-%	-%	-%				
Other	1	1	-	-	-	1	-	-	-	1	-	1	-	-	-	1	1	-	1	1				
	2%	4%	-%	-%	-%	4%	-%	-%	-%	4%	-%	5%	-%	-%	-%	12%	7%	-%	11%	7%				
		100%	-%	-%	-%	100%	-%	-%	-%	100%	-%	100%	-%	-%	-%	100%	100%	-%	100%	100%				
Don't know	3	3	-	-	-	3	-	-	3	-	3	-	-	-	-	-	-	-	-	-				
	6%	13%	-%	-%	-%	14%	-%	-%	10%	-%	12%	-%	-%	-%	-%	-%	-%	-%	-%	-%				
		100%	-%	-%	-%	100%	-%	-%	100%	-%	100%	-%	-%	-%	-%	-%	-%	-%	-%	-%				

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 43

## B7B. And what is the main reason you have for not considering switching from (ISDN2/2e/ ISDN30)? (SINGLE CODE)

Base : Those who (mostly) use ISN2/2e or ISDN30 and who are not currently considering switching away from the main ISDN service used

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
Significance Level: 95%		a	*b	*c	*d	*e	*f	*g	*h	*i	*j	*k	*l	*m	*n	o	*p	*q
Unweighted total	55	31	24	-	26	7	17	12	7	8	27	28	21	6	17	38	27	26
Effective Weighted Sample	39	19	24	-	17	4	17	12	6	7	20	19	18	4	15	25	19	22
Total	53	31	22	-	26	7	15	11	7	7	26	27	18	8	16	37	31	20
		59%	41%	-%	48%	13%	28%	22%	14%	14%	48%	52%	34%	14%	30%	70%	58%	38%
Good contacts at existing company	8	3	4	-	3	*	3	2	2	-	6	2	4	2	2	5	2	5
	14%	11%	19%	-%	12%	6%	21%	16%	30%	-%	23%	6%	23%	24%	14%	14%	7%	24%
		45%	55%	-%	40%	6%	42%	23%	29%	-%	79%	21%	55%	23%	29%	71%	27%	63%
Tied to long term contract	7	1	5	-	2	-	2	4	1	1	3	4	2	1	4	3	5	2
	13%	4%	25%	-%	9%	-%	12%	32%	14%	19%	13%	13%	13%	11%	27%	7%	15%	11%
		20%	80%	-%	32%	-%	27%	53%	15%	20%	47%	53%	35%	12%	62%	38%	68%	32%
Current service features are what we need	7	4	3	-	1	3	3	-	*	-	1	5	1	-	-	7	3	2
	13%	13%	12%	-%	3%	45%	18%	-%	6%	-%	5%	20%	7%	-%	-%	18%	10%	12%
		59%	41%	-%	13%	47%	41%	-%	6%	-%	18%	82%	18%	-%	-%	100%	47%	36%
Hassle	7	5	2	-	3	1	1	1	-	-	5	2	-	5	1	5	7	-
	13%	15%	10%	-%	12%	20%	8%	9%	-%	-%	18%	8%	-%	60%	9%	14%	22%	-%
		68%	32%	-%	47%	21%	17%	15%	-%	-%	68%	32%	-%	68%	21%	79%	100%	-%
Was offered a more attractive package/range of services	5	2	3	-	3	-	1	2	1	2	2	3	2	-	2	3	2	3
	10%	7%	13%	-%	12%	-%	5%	19%	19%	25%	7%	12%	10%	-%	14%	8%	7%	15%
		43%	57%	-%	58%	-%	15%	42%	27%	35%	35%	65%	35%	-%	42%	58%	42%	58%
Price of alternative services too high	5	4	1	-	3	*	-	1	-	-	2	3	1	*	2	2	1	3
	9%	12%	5%	-%	13%	6%	-%	9%	-%	-%	7%	10%	8%	6%	15%	6%	5%	16%
		78%	22%	-%	69%	9%	-%	22%	-%	-%	39%	61%	30%	9%	52%	48%	30%	70%
Current supplier(s) understand our business	4	4	-	-	4	-	-	1	2	-	2	2	2	-	1	3	4	1
	8%	14%	-%	-%	17%	-%	-%	7%	30%	-%	9%	8%	12%	-%	8%	9%	12%	4%
		100%	-%	-%	100%	-%	-%	18%	50%	-%	50%	50%	50%	-%	27%	73%	81%	19%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 43

**B7B. And what is the main reason you have for not considering switching from (ISDN2/2e/ ISDN30)? (SINGLE CODE)**

Base : Those who (mostly) use ISN2/2e or ISDN30 and who are not currently considering switching away from the main ISDN service used

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	*b	*c	*d	*e	*f	*g	*h	*i	*j	*k	*l	*m	*n	o	*p	*q
Significance Level: 95%																		
Unweighted total	55	31	24	-	26	7	17	12	7	8	27	28	21	6	17	38	27	26
Effective Weighted Sample	39	19	24	-	17	4	17	12	6	7	20	19	18	4	15	25	19	22
Total	53	31	22	-	26	7	15	11	7	7	26	27	18	8	16	37	31	20
		59%	41%	-%	48%	13%	28%	22%	14%	14%	48%	52%	34%	14%	30%	70%	58%	38%
Historic links to existing company(s)	3	2	1	-	2	-	1	1	-	1	2	1	2	-	1	1	2	1
	5%	6%	5%	-%	7%	-%	7%	9%	-%	14%	7%	4%	10%	-%	9%	4%	6%	5%
		65%	35%	-%	65%	-%	35%	36%	-%	36%	65%	35%	65%	-%	51%	49%	65%	35%
Easier to manage one supplier	3	1	2	-	1	*	2	-	-	2	2	1	2	-	1	2	1	2
	5%	4%	7%	-%	3%	6%	16%	-%	-%	28%	6%	4%	9%	-%	5%	5%	4%	8%
		43%	57%	-%	28%	15%	85%	-%	-%	72%	57%	43%	57%	-%	28%	72%	43%	57%
High internal costs associated with switching	1	1	-	-	-	1	1	-	-	-	*	1	*	-	-	1	-	1
	2%	4%	-%	-%	-%	17%	5%	-%	-%	-%	2%	3%	2%	-%	-%	3%	-%	6%
		100%	-%	-%	-%	100%	65%	-%	-%	-%	35%	65%	35%	-%	-%	100%	-%	100%
Other	1	-	1	-	-	-	1	-	-	1	1	-	1	-	-	1	1	-
	2%	-%	5%	-%	-%	-%	7%	-%	-%	14%	4%	-%	5%	-%	-%	3%	3%	-%
		-%	100%	-%	-%	-%	100%	-%	-%	100%	100%	-%	100%	-%	-%	100%	100%	-%
Don't know	3	3	-	-	3	-	-	-	-	-	-	3	-	-	-	3	3	-
	6%	10%	-%	-%	12%	-%	-%	-%	-%	-%	-%	11%	-%	-%	-%	8%	10%	-%
		100%	-%	-%	100%	-%	-%	-%	-%	-%	-%	100%	-%	-%	-%	100%	100%	-%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q



# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 43**

**B7B. And what is the main reason you have for not considering switching from (ISDN2/2e/ ISDN30)? (SINGLE CODE)**

Base : Those who (mostly) use ISN2/2e or ISDN30 and who are not currently considering switching away from the main ISDN service used

	SWITCHING ISDN SUPPLIER				CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%		*a	*b	c	*d	e	*f	*g	*h	*i	*j	*k	*l	*m	*n	*o	*p	*q	*r
Unweighted total	55	2	20	33	-	55	23	17	29	24	29	11	5	10	5	7	8	5	10
Effective Weighted Sample	39	2	17	23	-	39	15	12	21	18	19	7	4	9	5	7	7	4	9
Total	53	2	15	36	-	53	18	20	26	23	27	11	4	10	5	6	8	4	10
		4%	29%	67%	-%	100%	34%	38%	49%	43%	52%	21%	8%	18%	10%	12%	15%	8%	19%
Good contacts at existing company	8	-	4	4	-	8	4	1	4	3	4	1	2	1	1	1	1	2	-
	14%	-%	25%	11%	-%	14%	23%	6%	16%	15%	15%	11%	50%	8%	28%	12%	18%	52%	-%
		-%	50%	50%	-%	100%	55%	16%	55%	45%	55%	16%	29%	10%	18%	10%	18%	29%	-%
Tied to long term contract	7	-	3	4	-	7	2	3	4	3	4	1	-	2	1	1	1	-	2
	13%	-%	21%	10%	-%	13%	10%	13%	16%	12%	13%	7%	-%	25%	20%	16%	17%	-%	24%
		-%	47%	53%	-%	100%	27%	38%	58%	42%	53%	12%	-%	35%	15%	15%	20%	-%	35%
Current service features are what we need	7	-	1	6	-	7	1	5	*	5	3	3	*	-	-	-	*	*	-
	13%	-%	5%	16%	-%	13%	4%	27%	2%	22%	11%	28%	10%	-%	-%	-%	5%	10%	-%
		-%	12%	88%	-%	100%	12%	82%	6%	77%	47%	47%	6%	-%	-%	-%	6%	6%	-%
Hassle	7	-	1	5	-	7	-	7	6	1	4	3	-	-	-	-	-	-	-
	13%	-%	9%	15%	-%	13%	-%	33%	21%	5%	13%	28%	-%	-%	-%	-%	-%	-%	-%
		-%	21%	79%	-%	100%	-%	100%	83%	17%	53%	47%	-%	-%	-%	-%	-%	-%	-%
Was offered a more attractive package/range of services	5	-	2	3	-	5	1	1	3	2	2	-	-	2	1	2	1	-	3
	10%	-%	12%	9%	-%	10%	5%	6%	11%	11%	7%	-%	-%	22%	20%	28%	17%	-%	31%
		-%	36%	64%	-%	100%	16%	22%	53%	47%	38%	-%	-%	42%	20%	35%	27%	-%	62%
Price of alternative services too high	5	-	2	3	-	5	3	1	2	3	3	1	-	-	-	-	-	-	-
	9%	-%	12%	8%	-%	9%	18%	7%	7%	12%	12%	13%	-%	-%	-%	-%	-%	-%	-%
		-%	40%	60%	-%	100%	70%	30%	39%	61%	70%	30%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 43

## B7B. And what is the main reason you have for not considering switching from (ISDN2/2e/ ISDN30)? (SINGLE CODE)

Base : Those who (mostly) use ISN2/2e or ISDN30 and who are not currently considering switching away from the main ISDN service used

	SWITCHING ISDN SUPPLIER				CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
	NEVER				YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
	Total	LAST YEAR	EVER	/DK															
Significance Level: 95%		*a	*b	c	*d	e	*f	*g	*h	*i	*j	*k	*l	*m	*n	*o	*p	*q	*r
Unweighted total	55	2	20	33	-	55	23	17	29	24	29	11	5	10	5	7	8	5	10
Effective Weighted Sample	39	2	17	23	-	39	15	12	21	18	19	7	4	9	5	7	7	4	9
Total	53	2	15	36	-	53	18	20	26	23	27	11	4	10	5	6	8	4	10
		4%	29%	67%	-%	100%	34%	38%	49%	43%	52%	21%	8%	18%	10%	12%	15%	8%	19%
Current supplier(s) understand our business	4	2	*	2	-	4	1	1	3	1	2	*	1	2	1	1	1	1	1
	8%	100%	3%	5%	-%	8%	5%	7%	12%	6%	7%	4%	18%	22%	16%	12%	18%	19%	14%
		49%	9%	41%	-%	100%	19%	32%	68%	32%	41%	9%	18%	50%	18%	18%	32%	18%	32%
Historic links to existing company(s)	3	-	1	1	-	3	2	-	1	1	1	1	-	-	-	1	-	-	1
	5%	-%	10%	4%	-%	5%	10%	-%	6%	6%	3%	9%	-%	-%	-%	16%	-%	-%	10%
		-%	51%	49%	-%	100%	64%	-%	51%	49%	29%	35%	-%	-%	-%	36%	-%	-%	36%
Easier to manage one supplier	3	-	-	3	-	3	1	-	*	2	1	-	-	1	1	-	2	1	1
	5%	-%	-%	8%	-%	5%	4%	-%	2%	10%	3%	-%	-%	12%	16%	-%	25%	19%	12%
		-%	-%	100%	-%	100%	28%	-%	15%	85%	28%	-%	-%	43%	28%	-%	72%	28%	43%
High internal costs associated with switching	1	-	*	1	-	1	1	*	1	-	1	-	-	-	-	-	-	-	-
	2%	-%	3%	2%	-%	2%	4%	2%	5%	-%	4%	-%	-%	-%	-%	-%	-%	-%	-%
		-%	35%	65%	-%	100%	65%	35%	100%	-%	100%	-%	-%	-%	-%	-%	-%	-%	-%
Other	1	-	-	1	-	1	-	-	1	-	-	-	1	1	-	1	-	-	1
	2%	-%	-%	3%	-%	2%	-%	-%	4%	-%	-%	-%	23%	10%	-%	15%	-%	-%	10%
		-%	-%	100%	-%	100%	-%	-%	100%	-%	-%	-%	100%	100%	-%	100%	-%	-%	100%
Don't know	3	-	-	3	-	3	3	-	-	-	3	-	-	-	-	-	-	-	-
	6%	-%	-%	9%	-%	6%	17%	-%	-%	-%	11%	-%	-%	-%	-%	-%	-%	-%	-%
		-%	-%	100%	-%	100%	100%	-%	-%	-%	100%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 44**

## **B8A. What do you perceive are the benefits of switching away from (ISDN2/2e/ ISDN30)? (MULTI CODE)**

Base : Those who (mostly) use ISN2/2e or ISDN30 and who are currently considering switching away from the main ISDN service used

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											IP SWITCHED	IP NOT SWITCHED	ANY IP
	Total	UNDER			£1M	£1M-£20M	£21M-£100M		ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP					
		1-49	50-249	250+			£100M	0M										£100M				
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q	r	s		
Unweighted total	138	23	35	79	17	42	46	31	93	95	43	45	50	-	52	48	63	59	3	63		
Effective Weighted Sample	107	18	34	75	12	34	42	29	67	92	27	43	49	-	42	47	53	50	3	53		
Total	131	36	41	55	22	41	41	23	91	83	48	41	43	-	44	43	55	53	2	55		
		27%	31%	42%	17%	32%	31%	17%	69%	63%	37%	31%	33%	-%	33%	33%	42%	40%	1%	42%		
Greater functionality	72	16	28	28	9	23	24	14	54	44	27	18	26	-	28	29	36	35	1	36		
	55%	45%	68%	51%	42%	56%	59%	63%	59%	53%	57%	45%	62%	-%	64%	67%	66%	66%	74%	66%		
																k	k	k		k		
		22%	39%	39%	13%	32%	34%	20%	75%	62%	38%	25%	37%	-%	39%	40%	50%	48%	2%	50%		
Better value for money	62	16	19	27	10	13	23	16	49	39	23	13	26	-	30	30	38	36	2	38		
	47%	45%	46%	49%	46%	30%	56%	70%	54%	47%	47%	32%	61%	-%	69%	70%	70%	68%	100%	70%		
							e	e	k				k		ik	ik	ik	ik		ik		
		26%	31%	43%	17%	20%	37%	26%	79%	63%	37%	21%	42%	-%	49%	48%	62%	58%	3%	62%		
More reliable	52	12	18	22	5	17	19	11	37	38	14	15	22	-	21	24	27	26	1	27		
	40%	34%	44%	40%	22%	41%	47%	47%	40%	45%	30%	38%	52%	-%	48%	55%	50%	49%	74%	50%		
																j						
		23%	35%	42%	9%	33%	37%	21%	70%	72%	28%	30%	43%	-%	40%	45%	52%	50%	2%	52%		
Better service features	50	12	16	22	7	12	18	9	36	32	18	14	19	-	18	19	22	21	1	22		
	38%	33%	39%	40%	33%	29%	44%	40%	40%	39%	36%	34%	44%	-%	42%	44%	41%	39%	74%	41%		
		24%	32%	44%	15%	24%	36%	18%	73%	65%	35%	27%	38%	-%	36%	38%	45%	41%	2%	45%		
Lower price	42	18	7	17	10	16	8	8	28	26	16	14	13	-	12	13	15	14	1	15		
	32%	51%	17%	31%	45%	40%	19%	35%	31%	32%	33%	34%	30%	-%	28%	31%	28%	27%	49%	28%		
						f																
		43%	16%	41%	24%	39%	18%	19%	68%	63%	37%	32%	31%	-%	29%	31%	36%	33%	2%	36%		
More flexibility to add/change services	42	10	16	16	4	12	17	8	29	28	14	12	15	-	16	18	22	21	1	22		
	32%	27%	38%	30%	18%	30%	42%	35%	32%	33%	29%	31%	36%	-%	37%	41%	41%	40%	49%	41%		
		23%	37%	39%	10%	30%	41%	19%	70%	67%	33%	30%	36%	-%	39%	43%	53%	50%	2%	53%		
Requires little post purchase support	41	9	15	16	8	10	15	7	31	26	15	10	15	-	18	16	22	21	1	22		
	31%	26%	37%	30%	38%	24%	37%	31%	34%	31%	32%	25%	36%	-%	41%	38%	40%	39%	49%	40%		
		23%	37%	40%	21%	24%	38%	17%	75%	63%	37%	25%	38%	-%	43%	40%	54%	51%	2%	54%		

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 44**

## **B8A. What do you perceive are the benefits of switching away from (ISDN2/2e/ ISDN30)? (MULTI CODE)**

Base : Those who (mostly) use ISN2/2e or ISDN30 and who are currently considering switching away from the main ISDN service used

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION													ANY IP
	Total	1-49 *a	50-249 b	250+ c	UNDER				ISDN2 h	ISDN30 i	ISDN2 ONLY j	ISDN30 ONLY k	BOTH ISDN l	IP NOT ISDN *m	ISDN2 & IP n	ISDN30 & IP o	ISDN & IP p	IP SWITCHED	IP NOT SWITCHED			
					£1M £1M *d	£1M- £20M e	£21M-£10 0M f	OVER £100M g										ISDN	ISDN			
Significance Level: 95%																						
Unweighted total	138	23	35	79	17	42	46	31	93	95	43	45	50	-	52	48	63	59	3	63		
Effective Weighted Sample	107	18	34	75	12	34	42	29	67	92	27	43	49	-	42	47	53	50	3	53		
Total	131	36	41	55	22	41	41	23	91	83	48	41	43	-	44	43	55	53	2	55		
		27%	31%	42%	17%	32%	31%	17%	69%	63%	37%	31%	33%	-%	33%	33%	42%	40%	1%	42%		
Provides voice and data communications via the same service	37	6	14	17	3	8	19	7	28	26	10	9	18	-	13	18	19	18	1	19		
	28%	16%	35%	31%	13%	19%	46%	31%	31%	32%	22%	22%	41%	-%	31%	42%	34%	34%	49%	34%		
		15%	39%	45%	8%	22%	e 51%	19%	76%	72%	28%	24%	k 48%	-%	37%	k 48%	51%	49%	2%	51%		
Less expensive equipment required	36	10	11	15	2	14	9	8	25	23	13	11	13	-	11	12	12	11	1	12		
	27%	29%	26%	28%	11%	34%	21%	35%	28%	28%	26%	26%	30%	-%	26%	28%	23%	21%	74%	23%		
		29%	30%	42%	7%	38%	24%	22%	71%	65%	35%	29%	36%	-%	31%	33%	34%	31%	3%	34%		
More scalability as company grows	36	8	12	15	4	12	11	8	23	24	12	13	11	-	10	13	14	13	1	14		
	27%	23%	29%	28%	19%	29%	27%	36%	25%	29%	24%	31%	26%	-%	23%	29%	26%	25%	49%	26%		
		23%	34%	42%	12%	33%	31%	23%	65%	67%	33%	35%	32%	-%	28%	35%	40%	37%	2%	40%		
Ability to change numbering beyond local exchange	27	6	11	9	3	8	12	4	18	18	9	9	9	-	8	12	14	12	1	14		
	20%	18%	28%	16%	14%	20%	28%	17%	20%	21%	19%	21%	21%	-%	19%	29%	25%	24%	49%	25%		
		24%	43%	33%	11%	30%	43%	15%	68%	66%	34%	32%	34%	-%	31%	46%	51%	47%	3%	51%		
More options for LAN connectivity	13	3	3	7	1	3	4	5	10	10	3	3	7	-	7	8	8	7	1	8		
	10%	7%	8%	13%	5%	7%	11%	21%	11%	12%	6%	7%	17%	-%	15%	18%	14%	13%	49%	14%		
		19%	26%	54%	9%	21%	34%	36%	78%	79%	21%	22%	56%	-%	50%	59%	59%	53%	6%	59%		

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 44**

## **B8A. What do you perceive are the benefits of switching away from (ISDN2/2e/ ISDN30)? (MULTI CODE)**

Base : Those who (mostly) use ISN2/2e or ISDN30 and who are currently considering switching away from the main ISDN service used

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN30			ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		ISDN2	ISDN30	IP														
Significance Level: 95%		a	b	*c	d	e	f	g	h	*i	j	*k	l	*m	n	o	p	q
Unweighted total	138	79	59	-	55	38	58	37	43	20	120	18	108	12	74	64	40	97
Effective Weighted Sample	107	55	57	-	39	28	56	36	36	18	95	13	87	8	59	49	27	89
Total	131	79	53	-	52	39	51	32	38	16	114	17	102	12	75	56	47	84
		60%	40%	-%	40%	29%	39%	25%	29%	12%	87%	13%	78%	9%	57%	43%	35%	64%
Greater functionality	72	46	26	-	28	25	31	13	26	11	65	7	58	7	40	32	24	48
	55%	58%	50%	-%	54%	66%	61%	41%	67%	65%	57%	41%	57%	61%	53%	58%	51%	57%
		64%	36%	-%	39%	35%	43%	19%	36%	15%	90%	10%	80%	10%	55%	45%	33%	67%
Better value for money	62	41	20	-	29	20	30	9	33	5	55	7	52	3	26	36	18	43
	47%	53%	38%	-%	55%	51%	58%	29%	86%	31%	48%	39%	51%	26%	34%	64%	40%	51%
		67%	33%	-%	47%	32%	48%	15%	53%	8%	89%	11%	84%	5%	42%	58%	30%	70%
More reliable	52	31	21	-	19	18	24	14	20	7	46	6	39	7	29	23	12	41
	40%	39%	41%	-%	36%	47%	47%	43%	52%	44%	40%	36%	38%	60%	39%	41%	25%	48%
		59%	41%	-%	36%	35%	46%	27%	38%	14%	88%	12%	74%	14%	56%	44%	22%	78%
Better service features	50	31	19	-	24	12	21	11	20	2	46	4	41	5	26	24	15	35
	38%	39%	37%	-%	46%	32%	42%	35%	52%	14%	40%	23%	40%	43%	35%	42%	32%	41%
		61%	39%	-%	48%	25%	42%	23%	40%	4%	92%	8%	82%	10%	52%	48%	29%	70%
Lower price	42	27	15	-	16	12	16	10	12	3	36	7	30	6	19	23	18	25
	32%	34%	29%	-%	31%	32%	31%	32%	31%	21%	31%	37%	29%	49%	25%	41%	38%	29%
		64%	36%	-%	38%	29%	38%	25%	28%	8%	85%	15%	71%	14%	45%	55%	42%	58%
More flexibility to add/change services	42	21	20	-	13	16	19	8	17	6	38	4	34	4	19	22	11	31
	32%	27%	39%	-%	25%	41%	38%	26%	43%	34%	33%	22%	33%	33%	26%	39%	24%	36%
		51%	49%	-%	32%	38%	46%	20%	40%	14%	91%	9%	81%	9%	47%	53%	26%	74%
Requires little post purchase support	41	23	18	-	12	19	18	7	15	7	37	4	32	5	23	18	14	27
	31%	29%	35%	-%	23%	49%	36%	22%	38%	44%	32%	23%	31%	43%	31%	32%	31%	31%
		55%	45%	-%	29%	46%	45%	18%	36%	18%	90%	10%	78%	13%	56%	44%	35%	65%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 44

## B8A. What do you perceive are the benefits of switching away from (ISDN2/2e/ ISDN30)? (MULTI CODE)

Base : Those who (mostly) use ISN2/2e or ISDN30 and who are currently considering switching away from the main ISDN service used

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	b	*c	d	e	f	g	h	*i	j	*k	l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	138	79	59	-	55	38	58	37	43	20	120	18	108	12	74	64	40	97
Effective Weighted Sample	107	55	57	-	39	28	56	36	36	18	95	13	87	8	59	49	27	89
Total	131	79	53	-	52	39	51	32	38	16	114	17	102	12	75	56	47	84
		60%	40%	-%	40%	29%	39%	25%	29%	12%	87%	13%	78%	9%	57%	43%	35%	64%
Provides voice and data communications via the same service	37	22	15	-	16	12	15	12	15	4	36	1	32	4	16	21	10	27
	28%	28%	28%	-%	31%	31%	29%	37%	38%	25%	32%	5%	32%	33%	21%	37%	21%	32%
		60%	40%	-%	43%	33%	40%	32%	40%	11%	98%	2%	87%	11%	44%	56%	26%	74%
Less expensive equipment required	36	21	15	-	14	12	10	13	8	4	32	4	27	5	17	19	15	21
	27%	27%	28%	-%	27%	30%	20%	41%	22%	25%	28%	23%	27%	39%	23%	33%	32%	25%
		59%	41%	-%	39%	32%	28%	37%	23%	11%	89%	11%	76%	13%	48%	52%	41%	59%
More scalability as company grows	36	19	17	-	11	12	14	10	11	3	32	4	25	7	17	18	11	25
	27%	24%	32%	-%	21%	32%	28%	29%	29%	19%	28%	22%	24%	57%	23%	32%	23%	30%
		52%	48%	-%	30%	34%	40%	27%	31%	9%	89%	11%	70%	19%	49%	51%	30%	70%
Ability to change numbering beyond local exchange	27	14	12	-	10	8	12	5	11	2	24	2	21	3	10	17	11	16
	20%	18%	23%	-%	19%	22%	24%	16%	29%	15%	21%	14%	21%	26%	14%	29%	23%	19%
		54%	46%	-%	36%	31%	46%	20%	42%	9%	91%	9%	79%	12%	38%	62%	41%	59%
More options for LAN connectivity	13	7	6	-	5	5	7	3	6	2	13	-	12	1	7	7	1	12
	10%	9%	12%	-%	10%	13%	14%	10%	16%	10%	11%	-%	11%	12%	9%	12%	2%	14%
		52%	48%	-%	38%	39%	53%	26%	47%	12%	100%	-%	89%	11%	50%	50%	9%	91%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 44**

## **B8A. What do you perceive are the benefits of switching away from (ISDN2/2e/ ISDN30)? (MULTI CODE)**

Base : Those who (mostly) use ISN2/2e or ISDN30 and who are currently considering switching away from the main ISDN service used

	SWITCHING ISDN SUPPLIER				CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO		YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
									3 YEARS	4+ YEARS									
Significance Level: 95%		a	b	*c	d	*e	f	*g	h	*i	j	*k	l	m	n	*o	p	q	*r
Unweighted total	138	32	97	9	138	-	69	6	114	22	72	3	38	46	37	25	37	53	10
Effective Weighted Sample	107	23	81	5	107	-	51	6	89	19	54	3	31	43	33	20	34	45	9
Total	131	31	92	8	131	-	70	6	113	17	75	2	34	38	30	24	30	48	6
		23%	70%	6%	100%	-%	54%	5%	86%	13%	57%	2%	26%	29%	23%	18%	23%	37%	5%
Greater functionality	72	14	55	3	72	-	32	4	60	11	35	*	22	26	19	14	22	32	4
	55%	46%	59%	35%	55%	-%	46%	57%	53%	66%	47%	21%	65%	68%	64%	58%	73%	66%	68%
		20%	76%	4%	100%	-%	45%	5%	84%	16%	49%	1%	31%	36%	27%	20%	30%	44%	6%
Better value for money	62	13	41	7	62	-	24	-	53	8	23	*	29	26	20	16	22	35	3
	47%	43%	44%	90%	47%	-%	34%	-%	47%	44%	31%	21%	84%	69%	68%	64%	73%	73%	45%
		22%	66%	12%	100%	-%	38%	-%	86%	12%	38%	1%	47%	42%	33%	25%	36%	57%	5%
More reliable	52	11	38	3	52	-	21	4	44	8	24	1	16	23	19	11	17	24	4
	40%	36%	41%	41%	40%	-%	30%	65%	39%	48%	32%	40%	48%	60%	62%	44%	55%	49%	57%
		22%	72%	7%	100%	-%	40%	8%	84%	16%	46%	2%	31%	43%	36%	20%	32%	45%	7%
Better service features	50	17	31	2	50	-	24	4	42	7	28	-	15	18	12	9	13	20	2
	38%	55%	33%	29%	38%	-%	34%	62%	37%	41%	37%	-%	43%	49%	41%	37%	43%	41%	38%
		34%	62%	5%	100%	-%	48%	8%	85%	14%	55%	-%	30%	37%	25%	18%	26%	40%	5%
Lower price	42	14	22	7	42	-	25	2	37	5	26	*	11	10	9	9	6	13	2
	32%	45%	24%	80%	32%	-%	35%	30%	32%	27%	35%	21%	31%	26%	28%	38%	19%	27%	38%
		b																	
		33%	52%	16%	100%	-%	59%	5%	87%	11%	63%	1%	26%	23%	20%	22%	14%	31%	6%
More flexibility to add/change services	42	6	30	6	42	-	19	1	37	4	19	-	16	18	16	7	14	20	2
	32%	19%	32%	70%	32%	-%	26%	13%	33%	22%	26%	-%	45%	47%	53%	30%	48%	41%	38%
		14%	72%	14%	100%	-%	45%	2%	90%	9%	47%	-%	38%	43%	39%	17%	35%	48%	6%
Requires little post purchase support	41	5	35	1	41	-	19	-	36	4	19	-	14	16	11	10	11	19	3
	31%	16%	38%	15%	31%	-%	27%	-%	32%	26%	25%	-%	41%	42%	36%	42%	38%	39%	49%
		12%	85%	3%	100%	-%	46%	-%	88%	11%	46%	-%	35%	39%	26%	25%	28%	46%	8%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 44

## **B8A. What do you perceive are the benefits of switching away from (ISDN2/2e/ ISDN30)? (MULTI CODE)**

Base : Those who (mostly) use ISN2/2e or ISDN30 and who are currently considering switching away from the main ISDN service used

	SWITCHING ISDN SUPPLIER				CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%		a	b	*c	d	*e	f	*g	h	*i	j	*k	l	m	n	*o	p	q	*r
Unweighted total	138	32	97	9	138	-	69	6	114	22	72	3	38	46	37	25	37	53	10
Effective Weighted Sample	107	23	81	5	107	-	51	6	89	19	54	3	31	43	33	20	34	45	9
Total	131	31	92	8	131	-	70	6	113	17	75	2	34	38	30	24	30	48	6
		23%	70%	6%	100%	-%	54%	5%	86%	13%	57%	2%	26%	29%	23%	18%	23%	37%	5%
Provides voice and data communications via the same service	37	4	30	3	37	-	17	1	34	3	18	*	13	15	14	7	12	17	1
	28%	14%	32%	32%	28%	-%	25%	13%	30%	18%	24%	21%	36%	41%	46%	29%	39%	36%	19%
		12%	81%	7%	100%	-%	47%	2%	92%	8%	48%	1%	34%	42%	38%	19%	32%	47%	3%
Less expensive equipment required	36	10	25	1	36	-	24	-	33	3	23	1	9	9	8	6	6	11	2
	27%	33%	27%	15%	27%	-%	34%	-%	29%	18%	31%	40%	25%	24%	25%	26%	21%	22%	29%
		28%	68%	3%	100%	-%	66%	-%	91%	9%	63%	2%	24%	25%	21%	17%	17%	29%	5%
More scalability as company grows	36	6	28	1	36	-	19	2	31	4	21	1	8	13	10	6	8	13	2
	27%	20%	31%	15%	27%	-%	27%	35%	27%	24%	28%	40%	24%	35%	34%	24%	27%	26%	26%
		17%	80%	3%	100%	-%	54%	6%	87%	12%	58%	2%	24%	37%	29%	16%	23%	35%	5%
Ability to change numbering beyond local exchange	27	5	21	1	27	-	12	1	23	4	13	-	7	10	9	6	7	12	2
	20%	15%	23%	15%	20%	-%	17%	22%	20%	22%	17%	-%	20%	26%	31%	26%	23%	25%	26%
		17%	78%	5%	100%	-%	44%	5%	84%	14%	49%	-%	25%	37%	35%	24%	26%	45%	6%
More options for LAN connectivity	13	4	7	2	13	-	5	-	10	3	5	-	6	7	5	2	6	7	1
	10%	14%	7%	27%	10%	-%	8%	-%	9%	15%	7%	-%	17%	18%	16%	8%	19%	14%	13%
		32%	51%	17%	100%	-%	41%	-%	80%	20%	41%	-%	44%	53%	36%	15%	44%	53%	6%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r



# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 45**

## **B8B. And what do you perceive as the main benefit of switching away from (ISDN2/2e/ ISDN30)? (SINGLE CODE)**

Base : Those who (mostly) use ISN2/2e or ISDN30 and who are currently considering switching away from the main ISDN service used

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION												
	Total	UNDER			OVER				ISDN2	ISDN30		ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP SWITCHED	IP NOT SWITCHED	ANY IP
		1-49	50-249	250+	£1M	£1M-£20M	£21M-£100M	£100M		ISDN30	ISDN2										
Significance Level: 95%		*a	b	c	*d	e	f	g	h	i	j	k	l	*m	n	o	p	q	*r	s	
Unweighted total	138	23	35	79	17	42	46	31	93	95	43	45	50	-	52	48	63	59	3	63	
Effective Weighted Sample	107	18	34	75	12	34	42	29	67	92	27	43	49	-	42	47	53	50	3	53	
Total	131	36	41	55	22	41	41	23	91	83	48	41	43	-	44	43	55	53	2	55	
		27%	31%	42%	17%	32%	31%	17%	69%	63%	37%	31%	33%	-%	33%	33%	42%	40%	1%	42%	
Better value for money	30	11	5	14	8	8	8	6	25	14	16	4	9	-	14	9	16	16	*	16	
	23%	32%	12%	25%	37%	18%	20%	26%	28%	16%	34%	11%	21%	-%	33%	22%	29%	30%	26%	29%	
									k		k				ik		k	k		k	
		38%	16%	46%	27%	25%	27%	20%	85%	46%	54%	15%	31%	-%	47%	32%	54%	52%	1%	54%	
More reliable	24	3	10	10	3	7	9	5	15	18	6	9	9	-	9	10	12	11	1	12	
	18%	9%	25%	19%	13%	17%	21%	23%	17%	22%	12%	21%	22%	-%	21%	23%	22%	21%	74%	22%	
		13%	43%	43%	12%	30%	36%	22%	64%	75%	25%	36%	40%	-%	38%	42%	51%	46%	5%	51%	
Greater functionality	21	5	8	8	-	10	6	5	14	15	5	7	9	-	9	10	13	13	-	13	
	16%	13%	19%	15%	-%	24%	15%	20%	15%	19%	11%	17%	20%	-%	22%	23%	23%	24%	-%	23%	
		22%	38%	40%	-%	47%	29%	22%	67%	74%	26%	33%	41%	-%	45%	47%	60%	60%	-%	60%	
Lower price	15	9	2	4	5	8	-	2	10	9	6	5	5	-	3	4	4	4	-	4	
	12%	25%	6%	7%	22%	19%	-%	10%	11%	11%	12%	12%	11%	-%	8%	10%	8%	8%	-%	8%	
						f		f													
		58%	16%	26%	32%	52%	-%	16%	69%	61%	39%	31%	30%	-%	22%	29%	29%	29%	-%	29%	
Better service features	15	1	7	6	2	4	8	1	9	10	5	5	4	-	3	4	4	4	-	4	
	11%	4%	17%	12%	10%	9%	19%	3%	10%	12%	10%	13%	10%	-%	7%	9%	7%	7%	-%	7%	
		10%	47%	43%	15%	26%	54%	5%	64%	66%	34%	36%	30%	-%	19%	26%	26%	26%	-%	26%	
Less expensive equipment required	14	4	5	5	1	2	6	2	8	8	6	5	2	-	2	2	2	2	-	2	
	10%	12%	12%	9%	5%	4%	15%	7%	9%	9%	12%	13%	6%	-%	4%	4%	3%	3%	-%	3%	
		30%	35%	35%	8%	13%	45%	12%	60%	57%	43%	40%	17%	-%	12%	12%	12%	12%	-%	12%	
Requires little post purchase support	5	1	1	3	2	-	2	1	4	3	2	1	3	-	2	2	2	2	-	2	
	4%	3%	3%	5%	11%	-%	5%	3%	5%	4%	4%	2%	6%	-%	5%	4%	4%	3%	-%	4%	
		19%	27%	54%	46%	-%	39%	15%	85%	65%	35%	15%	50%	-%	43%	34%	43%	34%	-%	43%	
More scalability as company grows	4	-	1	2	-	1	2	1	2	2	1	2	1	-	-	-	-	-	-	-	
	3%	-%	3%	4%	-%	2%	5%	3%	2%	3%	3%	4%	2%	-%	-%	-%	-%	-%	-%	-%	
		-%	37%	63%	-%	21%	58%	21%	58%	63%	37%	42%	21%	-%	-%	-%	-%	-%	-%	-%	

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 45**

**B8B. And what do you perceive as the main benefit of switching away from (ISDN2/2e/ ISDN30)? (SINGLE CODE)**

Base : Those who (mostly) use ISN2/2e or ISDN30 and who are currently considering switching away from the main ISDN service used

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											IP NOT SWITCHED	IP NOT SWITCHED	ANY IP
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	ISDN	ISDN			
					£1M	£1M-£20M	£21M-£100M	OVER £100M														
Significance Level: 95%		*a	b	c	*d	e	f	g	h	i	j	k	l	*m	n	o	p	q	*r	s		
Unweighted total	138	23	35	79	17	42	46	31	93	95	43	45	50	-	52	48	63	59	3	63		
Effective Weighted Sample	107	18	34	75	12	34	42	29	67	92	27	43	49	-	42	47	53	50	3	53		
Total	131	36	41	55	22	41	41	23	91	83	48	41	43	-	44	43	55	53	2	55		
		27%	31%	42%	17%	32%	31%	17%	69%	63%	37%	31%	33%	-%	33%	33%	42%	40%	1%	42%		
Provides voice and data communications via the same service	3	-	1	2	1	1	-	1	1	3	*	2	1	-	1	2	2	2	-	2		
	2%	-%	3%	4%	4%	3%	-%	3%	1%	3%	1%	4%	2%	-%	2%	4%	3%	3%	-%	3%		
		-%	34%	66%	26%	48%	-%	26%	40%	86%	14%	60%	26%	-%	26%	60%	60%	60%	-%	60%		
More flexibility to add/change services	1	1	-	-	-	1	-	-	-	1	-	1	-	-	-	-	-	-	-	-		
	1%	3%	-%	-%	-%	3%	-%	-%	-%	1%	-%	3%	-%	-%	-%	-%	-%	-%	-%	-%		
		100%	-%	-%	-%	100%	-%	-%	-%	100%	-%	100%	-%	-%	-%	-%	-%	-%	-%	-%		

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 45

## B8B. And what do you perceive as the main benefit of switching away from (ISDN2/2e/ ISDN30)? (SINGLE CODE)

Base : Those who (mostly) use ISN2/2e or ISDN30 and who are currently considering switching away from the main ISDN service used

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN30			ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		ISDN2	ISDN30	IP														
Significance Level: 95%		a	b	*c	d	e	f	g	h	*i	j	*k	l	*m	n	o	p	q
Unweighted total	138	79	59	-	55	38	58	37	43	20	120	18	108	12	74	64	40	97
Effective Weighted Sample	107	55	57	-	39	28	56	36	36	18	95	13	87	8	59	49	27	89
Total	131	79	53	-	52	39	51	32	38	16	114	17	102	12	75	56	47	84
		60%	40%	-%	40%	29%	39%	25%	29%	12%	87%	13%	78%	9%	57%	43%	35%	64%
Better value for money	30	24	6	-	15	10	10	3	14	2	25	5	22	3	12	18	14	16
	23%	30%	11%	-%	29%	26%	21%	10%	37%	13%	22%	27%	22%	26%	16%	32%	30%	19%
		b			g				g									
		80%	20%	-%	51%	34%	35%	11%	47%	7%	84%	16%	74%	10%	41%	59%	47%	53%
More reliable	24	12	12	-	6	9	12	6	9	3	19	4	17	2	14	10	4	20
	18%	15%	23%	-%	12%	24%	23%	19%	24%	18%	17%	25%	17%	18%	19%	17%	9%	23%
		50%	50%	-%	26%	38%	50%	25%	39%	12%	82%	18%	72%	9%	59%	41%	17%	83%
Greater functionality	21	12	9	-	7	7	9	7	7	5	18	3	16	2	14	7	5	16
	16%	16%	16%	-%	14%	18%	18%	20%	19%	31%	16%	17%	16%	13%	18%	13%	11%	19%
		58%	42%	-%	34%	33%	43%	31%	35%	24%	86%	14%	78%	8%	65%	35%	25%	75%
Lower price	15	10	5	-	7	3	4	5	4	1	14	1	12	2	10	5	6	9
	12%	13%	9%	-%	14%	9%	9%	15%	9%	5%	13%	5%	12%	16%	13%	9%	14%	10%
		69%	31%	-%	47%	22%	30%	31%	24%	5%	95%	5%	82%	13%	66%	34%	42%	58%
Better service features	15	7	7	-	5	4	6	3	2	2	13	1	11	2	7	8	4	10
	11%	9%	14%	-%	10%	11%	12%	10%	5%	11%	12%	8%	11%	20%	9%	14%	9%	12%
		50%	50%	-%	34%	30%	43%	23%	14%	12%	91%	9%	74%	16%	47%	53%	27%	70%
Less expensive equipment required	14	8	5	-	7	1	4	4	1	1	12	2	12	-	9	5	7	7
	10%	11%	10%	-%	13%	4%	8%	11%	2%	5%	10%	10%	12%	-%	12%	8%	14%	8%
		60%	40%	-%	50%	10%	30%	27%	6%	6%	87%	13%	87%	-%	67%	33%	48%	52%
Requires little post purchase support	5	3	3	-	3	2	2	1	*	2	4	1	4	-	4	1	3	2
	4%	3%	5%	-%	5%	5%	5%	3%	1%	11%	3%	8%	4%	-%	5%	2%	6%	3%
		50%	50%	-%	50%	34%	46%	19%	8%	34%	73%	27%	73%	-%	77%	23%	54%	46%
More scalability as company grows	4	1	2	-	1	1	-	2	-	-	4	-	3	1	2	2	-	4
	3%	2%	4%	-%	3%	2%	-%	7%	-%	-%	3%	-%	3%	7%	2%	4%	-%	4%
								f										
Columns Tested:		37%	63%	-%	37%	21%	-%	63%	-%	-%	100%	-%	79%	21%	42%	58%	-%	100%

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 45

**B8B. And what do you perceive as the main benefit of switching away from (ISDN2/2e/ ISDN30)? (SINGLE CODE)**

Base : Those who (mostly) use ISN2/2e or ISDN30 and who are currently considering switching away from the main ISDN service used

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
Significance Level: 95%		a	b	*c	d	e	f	g	h	*i	j	*k	l	*m	n	o	p	q
Unweighted total	138	79	59	-	55	38	58	37	43	20	120	18	108	12	74	64	40	97
Effective Weighted Sample	107	55	57	-	39	28	56	36	36	18	95	13	87	8	59	49	27	89
Total	131	79	53	-	52	39	51	32	38	16	114	17	102	12	75	56	47	84
		60%	40%	-%	40%	29%	39%	25%	29%	12%	87%	13%	78%	9%	57%	43%	35%	64%
Provides voice and data communications via the same service	3	*	3	-	*	1	1	2	1	1	3	-	3	-	3	*	2	1
	2%	1%	5%	-%	1%	2%	2%	5%	2%	6%	3%	-%	3%	-%	3%	1%	5%	1%
		14%	86%	-%	14%	26%	34%	52%	26%	34%	100%	-%	100%	-%	86%	14%	74%	26%
More flexibility to add/change services	1	-	1	-	-	-	1	-	-	-	1	-	1	-	1	-	1	-
	1%	-%	2%	-%	-%	-%	2%	-%	-%	-%	1%	-%	1%	-%	1%	-%	2%	-%
		-%	100%	-%	-%	-%	100%	-%	-%	-%	100%	-%	100%	-%	100%	-%	100%	-%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 45**

**B8B. And what do you perceive as the main benefit of switching away from (ISDN2/2e/ ISDN30)? (SINGLE CODE)**

Base : Those who (mostly) use ISN2/2e or ISDN30 and who are currently considering switching away from the main ISDN service used

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
								UP TO							UP TO				OVER
	3 YEARS		4+ YEARS		2 YEARS		2 YEARS												
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	YES	NO/DK	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	YES	NO/DK	YES	NO/DK
	a	b	*c	d	*e	f	*g	h	*i	j	*k	l	m	n	*o	p	q	*r	
Significance Level: 95%																			
Unweighted total	138	32	97	9	138	-	69	6	114	22	72	3	38	46	37	25	37	53	10
Effective Weighted Sample	107	23	81	5	107	-	51	6	89	19	54	3	31	43	33	20	34	45	9
Total	131	31	92	8	131	-	70	6	113	17	75	2	34	38	30	24	30	48	6
		23%	70%	6%	100%	-%	54%	5%	86%	13%	57%	2%	26%	29%	23%	18%	23%	37%	5%
Better value for money	30	6	20	4	30	-	14	-	26	4	14	-	13	10	8	8	8	14	2
	23%	21%	21%	48%	23%	-%	20%	-%	23%	23%	19%	-%	37%	26%	28%	31%	28%	30%	26%
		21%	65%	13%	100%	-%	46%	-%	85%	13%	46%	-%	42%	32%	28%	25%	28%	48%	5%
More reliable	24	5	17	2	24	-	9	3	21	3	11	1	7	8	10	7	6	11	1
	18%	15%	19%	24%	18%	-%	12%	47%	18%	18%	15%	40%	21%	23%	32%	28%	18%	24%	13%
		20%	72%	8%	100%	-%	36%	12%	87%	13%	45%	3%	30%	36%	40%	28%	23%	48%	3%
Greater functionality	21	3	18	-	21	-	8	1	18	3	8	-	8	9	4	5	7	10	3
	16%	10%	19%	-%	16%	-%	11%	13%	16%	16%	11%	-%	22%	24%	14%	21%	25%	20%	42%
		15%	85%	-%	100%	-%	36%	4%	87%	13%	40%	-%	37%	43%	20%	24%	35%	47%	13%
Lower price	15	9	5	1	15	-	10	1	14	1	11	-	3	3	3	2	2	4	1
	12%	29%	5%	17%	12%	-%	14%	18%	12%	7%	14%	-%	8%	9%	11%	8%	8%	7%	13%
		b																	
		58%	32%	9%	100%	-%	64%	7%	93%	7%	71%	-%	17%	22%	22%	13%	16%	24%	5%
Better service features	15	2	12	-	15	-	9	1	12	2	11	-	3	4	1	-	4	4	-
	11%	7%	13%	-%	11%	-%	13%	22%	11%	14%	14%	-%	8%	10%	3%	-%	13%	8%	-%
		15%	85%	-%	100%	-%	64%	9%	83%	17%	74%	-%	19%	26%	7%	-%	26%	26%	-%
Less expensive equipment required	14	5	9	-	14	-	12	-	13	1	11	1	-	1	1	1	1	2	-
	10%	15%	10%	-%	10%	-%	17%	-%	11%	5%	15%	40%	-%	2%	3%	3%	3%	3%	-%
		34%	66%	-%	100%	-%	88%	-%	94%	6%	83%	6%	-%	6%	6%	6%	6%	12%	-%
Requires little post purchase support	5	-	5	*	5	-	3	-	3	1	3	-	1	2	1	1	1	2	*
	4%	-%	5%	5%	4%	-%	4%	-%	3%	8%	4%	-%	2%	5%	3%	4%	3%	4%	7%
		-%	92%	8%	100%	-%	57%	-%	65%	27%	57%	-%	15%	34%	19%	19%	15%	34%	8%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 45

## B8B. And what do you perceive as the main benefit of switching away from (ISDN2/2e/ ISDN30)? (SINGLE CODE)

Base : Those who (mostly) use ISN2/2e or ISDN30 and who are currently considering switching away from the main ISDN service used

	SWITCHING ISDN SUPPLIER				CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%	a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q	r	
Unweighted total	138	32	97	9	138	-	69	6	114	22	72	3	38	46	37	25	37	53	10
Effective Weighted Sample	107	23	81	5	107	-	51	6	89	19	54	3	31	43	33	20	34	45	9
Total	131	31	92	8	131	-	70	6	113	17	75	2	34	38	30	24	30	48	6
		23%	70%	6%	100%	-%	54%	5%	86%	13%	57%	2%	26%	29%	23%	18%	23%	37%	5%
More scalability as company grows	4	1	3	-	4	-	4	-	2	2	4	-	-	-	-	-	-	-	-
	3%	3%	3%	-%	3%	-%	5%	-%	2%	9%	5%	-%	-%	-%	-%	-%	-%	-%	-%
		21%	79%	-%	100%	-%	100%	-%	58%	42%	100%	-%	-%	-%	-%	-%	-%	-%	-%
Provides voice and data communications via the same service	3	-	3	*	3	-	1	-	3	-	1	*	1	1	2	1	1	2	-
	2%	-%	3%	5%	2%	-%	2%	-%	3%	-%	1%	21%	2%	2%	6%	4%	3%	4%	-%
		-%	86%	14%	100%	-%	40%	-%	100%	-%	26%	14%	26%	26%	60%	34%	26%	60%	-%
More flexibility to add/change services	1	-	1	-	1	-	1	-	1	-	1	-	-	-	-	-	-	-	-
	1%	-%	1%	-%	1%	-%	2%	-%	1%	-%	2%	-%	-%	-%	-%	-%	-%	-%	-%
		-%	100%	-%	100%	-%	100%	-%	100%	-%	100%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 46**

**B9. Do you have any hang-ups/concerns about moving away from (ISDN2/2e/ ISDN30)? (MULTI CODE)**

Base : Those who (mostly) use ISN2/2e or ISDN30 and who are currently considering switching away from the main ISDN service used

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											ANY IP	
	Total	UNDER			OVER				ISDN2	ISDN30		ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP		
		1-49	50-249	250+	£1M	£1M- £20M	£21M-£100M	£100M		SWITCHED	IP NOT SWITCHED										
		*a	b	c	*d	e	f	g	h	i	j	k	l	*m	n	o	p	q	*r	s	
Significance Level: 95%																					
Unweighted total	138	23	35	79	17	42	46	31	93	95	43	45	50	-	52	48	63	59	3	63	
Effective Weighted Sample	107	18	34	75	12	34	42	29	67	92	27	43	49	-	42	47	53	50	3	53	
Total	131	36	41	55	22	41	41	23	91	83	48	41	43	-	44	43	55	53	2	55	
		27%	31%	42%	17%	32%	31%	17%	69%	63%	37%	31%	33%	-%	33%	33%	42%	40%	1%	42%	
Yes, reliability of alternative	73	18	26	29	12	18	28	15	51	47	26	21	26	-	28	27	36	35	1	36	
	56%	50%	64%	53%	53%	42%	69%	67%	57%	57%	53%	53%	61%	-%	64%	63%	66%	67%	51%	66%	
		25%	36%	39%	16%	24%	39%	21%	71%	65%	35%	29%	36%	-%	38%	37%	49%	48%	1%	49%	
Yes, security of alternative	71	18	21	31	14	17	24	13	47	49	22	24	24	-	27	29	35	34	*	35	
	54%	51%	52%	58%	60%	41%	58%	59%	51%	59%	46%	60%	57%	-%	61%	67%	63%	65%	26%	63%	
		26%	30%	44%	19%	24%	33%	19%	66%	69%	31%	34%	34%	-%	38%	40%	49%	48%	1%	49%	
Yes, high price of alternative	51	11	16	24	7	17	14	13	37	37	14	14	23	-	21	23	26	26	-	26	
	39%	31%	39%	45%	33%	41%	34%	56%	41%	45%	29%	35%	54%	-%	49%	54%	48%	50%	-%	48%	
		21%	31%	48%	15%	33%	27%	25%	73%	73%	27%	27%	j 45%	-%	42%	j 45%	52%	52%	-%	52%	
Yes, internal costs of moving away from (ISDN2/2e/ ISDN30)	42	17	9	17	10	8	13	9	29	28	14	13	15	-	17	17	22	22	-	22	
	32%	47%	22%	31%	44%	19%	31%	38%	32%	34%	29%	32%	36%	-%	39%	40%	40%	41%	-%	40%	
		39%	21%	39%	23%	19%	30%	21%	69%	67%	33%	31%	36%	-%	40%	40%	51%	51%	-%	51%	
No, None	8	4	1	2	3	3	1	1	7	3	5	1	3	-	3	3	3	2	1	3	
	6%	12%	3%	4%	11%	8%	3%	3%	8%	4%	9%	2%	6%	-%	6%	6%	5%	3%	49%	5%	
		52%	18%	30%	33%	40%	18%	10%	90%	43%	57%	10%	33%	-%	33%	33%	33%	23%	10%	33%	
Don't Know	*	-	-	*	-	-	*	-	*	-	*	-	-	-	*	-	*	-	-	*	
	*%	-%	-%	1%	-%	-%	1%	-%	*%	-%	1%	-%	-%	-%	1%	-%	1%	-%	-%	1%	
		-%	-%	100%	-%	-%	100%	-%	100%	-%	100%	-%	-%	-%	100%	-%	100%	-%	-%	100%	

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 46

B9. Do you have any hang-ups/concerns about moving away from (ISDN2/2e/ ISDN30)? (MULTI CODE)

Base : Those who (mostly) use ISN2/2e or ISDN30 and who are currently considering switching away from the main ISDN service used

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
Significance Level: 95%		a	b	*c	d	e	f	g	h	*i	j	*k	l	*m	n	o	p	q
Unweighted total	138	79	59	-	55	38	58	37	43	20	120	18	108	12	74	64	40	97
Effective Weighted Sample	107	55	57	-	39	28	56	36	36	18	95	13	87	8	59	49	27	89
Total	131	79	53	-	52	39	51	32	38	16	114	17	102	12	75	56	47	84
		60%	40%	-%	40%	29%	39%	25%	29%	12%	87%	13%	78%	9%	57%	43%	35%	64%
Yes, reliability of alternative	73	45	28	-	32	20	32	15	28	8	64	9	61	3	38	35	21	52
	56%	58%	53%	-%	61%	51%	64%	47%	72%	51%	56%	50%	60%	26%	51%	62%	45%	62%
		62%	38%	-%	44%	27%	44%	21%	38%	11%	88%	12%	84%	4%	52%	48%	29%	71%
Yes, security of alternative	71	39	32	-	30	17	33	16	28	6	63	9	57	5	41	30	24	46
	54%	50%	61%	-%	57%	44%	65%	49%	74%	39%	55%	49%	56%	43%	55%	53%	53%	55%
		55%	45%	-%	42%	24%	46%	23%	40%	9%	88%	12%	81%	7%	58%	42%	34%	65%
Yes, high price of alternative	51	32	19	-	25	12	22	15	20	7	44	7	41	3	26	26	13	38
	39%	40%	37%	-%	47%	32%	43%	47%	51%	41%	39%	40%	40%	28%	34%	45%	28%	45%
		62%	38%	-%	49%	24%	43%	30%	39%	13%	86%	14%	80%	7%	50%	50%	25%	75%
Yes, internal costs of moving away from (ISDN2/2e/ ISDN30)	42	25	17	-	21	8	15	13	18	3	35	7	33	2	23	20	18	24
	32%	32%	32%	-%	40%	21%	30%	41%	48%	21%	31%	42%	32%	16%	30%	35%	38%	29%
		60%	40%	-%	50%	19%	36%	32%	43%	8%	83%	17%	78%	5%	54%	46%	42%	58%
No, None	8	5	3	-	1	6	1	3	1	2	7	1	4	3	3	5	6	2
	6%	7%	5%	-%	3%	15%	2%	8%	2%	11%	6%	5%	4%	26%	4%	8%	14%	2%
		67%	33%	-%	18%	72%	10%	33%	10%	23%	90%	10%	50%	40%	40%	60%	80%	20%
Don't Know	*	*	-	-	*	-	-	-	*	-	*	-	*	-	-	*	*	-
	*%	1%	-%	-%	1%	-%	-%	-%	1%	-%	*%	-%	*%	-%	-%	1%	1%	-%
		100%	-%	-%	100%	-%	-%	-%	100%	-%	100%	-%	100%	-%	-%	100%	100%	-%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		



# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 46

## B9. Do you have any hang-ups/concerns about moving away from (ISDN2/2e/ ISDN30)? (MULTI CODE)

Base : Those who (mostly) use ISN2/2e or ISDN30 and who are currently considering switching away from the main ISDN service used

	SWITCHING ISDN SUPPLIER				CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%		a	b	*c	d	*e	f	*g	h	*i	j	*k	l	m	n	*o	p	q	*r
Unweighted total	138	32	97	9	138	-	69	6	114	22	72	3	38	46	37	25	37	53	10
Effective Weighted Sample	107	23	81	5	107	-	51	6	89	19	54	3	31	43	33	20	34	45	9
Total	131	31	92	8	131	-	70	6	113	17	75	2	34	38	30	24	30	48	6
		23%	70%	6%	100%	-%	54%	5%	86%	13%	57%	2%	26%	29%	23%	18%	23%	37%	5%
Yes, reliability of alternative	73	20	49	4	73	-	34	3	64	9	36	*	27	26	20	14	22	33	3
	56%	65%	53%	53%	56%	-%	49%	40%	56%	52%	49%	21%	77%	68%	66%	59%	73%	67%	55%
		27%	67%	6%	100%	-%	47%	3%	88%	12%	50%	1%	36%	35%	27%	20%	30%	45%	5%
Yes, security of alternative	71	17	48	6	71	-	33	3	59	11	35	1	24	25	18	15	20	32	2
	54%	56%	52%	71%	54%	-%	47%	47%	52%	66%	47%	60%	70%	67%	58%	62%	66%	67%	38%
		24%	68%	8%	100%	-%	47%	4%	84%	16%	49%	2%	34%	36%	25%	21%	28%	45%	3%
Yes, high price of alternative	51	14	33	4	51	-	24	1	43	8	23	1	20	21	18	11	16	25	1
	39%	45%	35%	53%	39%	-%	34%	13%	38%	44%	31%	60%	59%	56%	59%	44%	53%	52%	23%
		27%	64%	8%	100%	-%	47%	2%	85%	15%	46%	2%	40%	41%	35%	21%	31%	49%	3%
Yes, internal costs of moving away from (ISDN2/2e/ ISDN30)	42	15	24	3	42	-	19	2	34	9	20	1	15	15	10	11	11	21	1
	32%	48%	26%	38%	32%	-%	26%	30%	30%	50%	26%	40%	44%	41%	34%	45%	36%	43%	13%
		35%	58%	7%	100%	-%	44%	5%	79%	21%	47%	2%	36%	36%	24%	26%	26%	50%	2%
No, None	8	1	6	1	8	-	5	-	8	-	5	-	-	2	3	2	1	1	2
	6%	5%	6%	10%	6%	-%	8%	-%	7%	-%	7%	-%	-%	5%	9%	7%	3%	2%	25%
		18%	72%	10%	100%	-%	67%	-%	100%	-%	67%	-%	-%	23%	33%	23%	10%	13%	20%
Don't Know	*	-	-	*	*	-	-	-	-	-	-	-	-	-	-	-	-	-	*
	*%	-%	-%	5%	*%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	7%
		-%	-%	100%	100%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	100%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 47**

## **B9B. Which of these would concern you about moving away from (ISDN2/2e/ ISDN30)? (MULTI CODE)**

Base : Those who (mostly) use ISN2/2e or ISDN30 and who are currently considering switching away from the main ISDN service used and have concerns about internal costs of moving away

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION													ANY IP *s
	Total	1-49 *a	50-249 *b	250+ *c	UNDER				ISDN2 *h	ISDN30 i	ISDN2 ONLY *j	ISDN30		IP NOT ISDN *m	ISDN2 & IP *n	ISDN30		IP SWITCHED *q	IP NOT SWITCHED *r			
					£1M *d	£1M- £20M *e	£21M-£100M *f	OVER £100M *g				ONLY *k	BOTH ISDN *l			& IP *o	ISDN & IP *p					
Significance Level: 95%																						
Unweighted total	41	10	8	23	5	9	14	12	27	32	9	14	18	-	19	19	24	24	-	24		
Effective Weighted Sample	30	7	8	22	4	9	13	12	18	31	6	14	18	-	14	19	18	18	-	18		
Total	42	17	9	17	10	8	13	9	29	28	14	13	15	-	17	17	22	22	-	22		
		39%	21%	39%	23%	19%	30%	21%	69%	67%	33%	31%	36%	-%	40%	40%	51%	51%	-%	51%		
CAPITAL COSTS																						
Cost of infrastructure (e.g. cabling)	35	13	7	14	10	3	10	9	25	21	14	9	12	-	14	13	18	18	-	18		
	82%	81%	77%	86%	100%	41%	78%	100%	87%	73%	100%	70%	76%	-%	83%	77%	82%	82%	-%	82%		
		39%	20%	41%	28%	9%	28%	25%	73%	60%	40%	27%	34%	-%	41%	38%	52%	52%	-%	52%		
Cost of hardware (e.g. phones)	25	10	3	12	5	3	7	7	19	17	7	6	12	-	11	10	12	12	-	12		
	59%	62%	34%	69%	54%	35%	52%	82%	67%	61%	54%	43%	78%	-%	64%	62%	54%	54%	-%	54%		
		41%	12%	46%	21%	11%	27%	29%	78%	70%	30%	22%	48%	-%	43%	42%	47%	47%	-%	47%		
OPERATIONAL COSTS																						
Cost of training	24	7	4	13	2	8	6	8	13	23	1	11	12	-	11	14	16	16	-	16		
	58%	44%	46%	79%	22%	100%	51%	91%	45%	82%	9%	86%	78%	-%	64%	85%	72%	72%	-%	72%		
		30%	17%	54%	9%	32%	27%	32%	54%	95%	5%	46%	49%	-%	44%	59%	64%	64%	-%	64%		
Installation costs (e.g. down time, costs of removing existing equipment etc)	15	5	2	8	4	1	4	6	11	10	4	4	7	-	7	6	7	7	-	7		
	35%	32%	23%	45%	42%	14%	32%	64%	38%	37%	32%	28%	45%	-%	43%	35%	33%	33%	-%	33%		
		35%	14%	51%	28%	8%	27%	37%	75%	71%	29%	25%	46%	-%	49%	40%	49%	49%	-%	49%		
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																						

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 47**

## **B9B. Which of these would concern you about moving away from (ISDN2/2e/ ISDN30)? (MULTI CODE)**

Base : Those who (mostly) use ISN2/2e or ISDN30 and who are currently considering switching away from the main ISDN service used and have concerns about internal costs of moving away

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		*a	*b	*c	*d	*e	*f	*g	*h	*i	j	*k	l	*m	*n	*o	*p	q
Significance Level: 95%																		
Unweighted total	41	23	18	-	20	7	17	15	19	5	36	5	34	2	20	21	11	30
Effective Weighted Sample	30	15	18	-	13	5	17	15	14	4	27	4	25	2	15	16	8	28
Total	42	25	17	-	21	8	15	13	18	3	35	7	33	2	23	20	18	24
		60%	40%	-%	50%	19%	36%	32%	43%	8%	83%	17%	78%	5%	54%	46%	42%	58%
<b>CAPITAL COSTS</b>																		
Cost of infrastructure (e.g. cabling)	35	24	11	-	19	6	11	9	16	2	29	6	29	-	18	17	16	19
	82%	93%	66%	-%	91%	77%	76%	71%	89%	47%	84%	75%	88%	-%	80%	85%	88%	78%
		68%	32%	-%	55%	18%	33%	27%	47%	5%	84%	16%	84%	-%	52%	48%	45%	55%
Cost of hardware (e.g. phones)	25	16	9	-	16	3	9	9	11	1	22	3	22	-	8	17	10	15
	59%	62%	55%	-%	75%	43%	59%	65%	58%	35%	63%	43%	66%	-%	37%	85%	57%	61%
		63%	37%	-%	64%	14%	35%	35%	42%	5%	87%	13%	87%	-%	33%	67%	41%	59%
<b>OPERATIONAL COSTS</b>																		
Cost of training	24	11	14	-	8	5	13	10	12	3	22	3	20	2	13	11	6	18
	58%	41%	83%	-%	39%	61%	88%	75%	66%	100%	62%	38%	60%	100%	58%	58%	35%	74%
		43%	57%	-%	33%	20%	54%	41%	50%	14%	88%	12%	81%	8%	54%	46%	25%	75%
Installation costs (e.g. down time, costs of removing existing equipment etc)	15	8	7	-	10	2	6	4	7	*	12	3	11	1	4	10	6	9
	35%	33%	39%	-%	46%	20%	41%	32%	37%	12%	34%	43%	32%	59%	20%	53%	34%	36%
		56%	44%	-%	65%	11%	42%	29%	46%	3%	79%	21%	71%	8%	30%	70%	41%	59%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 47

## **B9B. Which of these would concern you about moving away from (ISDN2/2e/ ISDN30)? (MULTI CODE)**

Base : Those who (mostly) use ISN2/2e or ISDN30 and who are currently considering switching away from the main ISDN service used and have concerns about internal costs of moving away

	SWITCHING ISDN SUPPLIER				CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO				SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
									3 YEARS	4+ YEARS									
									*a	*b	*c	d							
Significance Level: 95%																			
Unweighted total	41	15	25	1	41	-	15	2	31	10	16	1	17	19	13	10	14	23	1
Effective Weighted Sample	30	11	20	1	30	-	11	2	22	9	12	1	12	18	12	7	13	17	1
Total	42	15	24	3	42	-	19	2	34	9	20	1	15	15	10	11	11	21	1
		35%	58%	7%	100%	-%	44%	5%	79%	21%	47%	2%	36%	36%	24%	26%	26%	50%	2%
CAPITAL COSTS																			
Cost of infrastructure (e.g. cabling)	35	14	18	3	35	-	17	-	28	7	17	-	15	12	8	10	8	17	1
	82%	93%	73%	100%	82%	-%	90%	-%	83%	78%	85%	-%	100%	80%	80%	91%	74%	82%	100%
		40%	51%	9%	100%	-%	48%	-%	81%	19%	48%	-%	44%	35%	23%	28%	23%	49%	2%
Cost of hardware (e.g. phones)	25	15	7	3	25	-	13	-	20	5	13	-	10	10	8	4	8	12	-
	59%	100%	29%	100%	59%	-%	71%	-%	58%	62%	67%	-%	64%	67%	78%	34%	74%	56%	-%
		59%	28%	13%	100%	-%	53%	-%	79%	21%	53%	-%	39%	41%	32%	15%	32%	47%	-%
OPERATIONAL COSTS																			
Cost of training	24	9	15	-	24	-	7	2	18	6	8	1	10	13	9	6	9	15	1
	58%	61%	63%	-%	58%	-%	37%	100%	54%	72%	41%	100%	65%	83%	88%	57%	87%	71%	100%
		37%	63%	-%	100%	-%	28%	8%	74%	26%	33%	3%	41%	52%	37%	25%	39%	61%	3%
Installation costs (e.g. down time, costs of removing existing equipment etc)	15	5	6	3	15	-	6	1	12	3	8	-	6	7	4	2	6	7	-
	35%	36%	26%	100%	35%	-%	35%	59%	36%	32%	39%	-%	41%	45%	42%	15%	52%	35%	-%
		36%	43%	21%	100%	-%	44%	8%	82%	18%	51%	-%	42%	46%	28%	11%	38%	49%	-%
Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																			

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 48**

VALUE USED TO REPRESENT 10% INCREASE IN TOTAL ANNUAL SPEND ON MAIN ISDN SERVICE - CALCULATED FROM NUMBER OF ISDN CHANNELS AT £25 PER CHANNEL PER MONTH (A1A/A1B) OR ANNUAL SPEND (A10) OR EXAMPLE TOTAL ANNUAL SPEND OF £50,000

Base : Those who (mostly) use ISN2/2e or ISDN30

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP SWITCHED		ANY IP
					£1M	£1M-£20M	£21M-£100M	OVER £100M										ISDN	ISDN	
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	*m	n	o	p	q	*r	s
Unweighted total	217	44	52	120	30	67	64	52	141	137	80	76	61	-	67	61	85	67	16	85
Effective Weighted Sample	165	35	51	112	21	53	58	46	98	133	49	74	60	-	55	60	73	58	14	73
Total	209	68	61	79	40	70	54	39	139	122	87	70	52	-	57	54	75	61	13	75
		33%	29%	38%	19%	34%	26%	19%	67%	58%	42%	33%	25%	-%	28%	26%	36%	29%	6%	36%
UP TO £250	87	41	25	20	25	34	18	6	87	17	69	-	17	-	21	7	21	16	4	21
	42%	60%	41%	25%	61%	48%	34%	16%	62%	14%	80%	-%	33%	-%	36%	12%	28%	27%	31%	28%
		c	c		fg	g	g		iklnopqs	k	hiklnopqs		iko		iko	k	iko	ik		iko
		48%	29%	23%	28%	39%	21%	7%	100%	20%	80%	-%	20%	-%	24%	8%	24%	19%	5%	24%
£251-£500	20	1	8	11	-	6	6	7	20	6	14	-	6	-	10	3	10	7	3	10
	10%	2%	13%	13%	-%	8%	11%	19%	14%	5%	16%	-%	11%	-%	17%	6%	13%	11%	20%	13%
								d	ik		ik		k		ik	k	ik	k		ik
		7%	40%	53%	-%	29%	30%	36%	100%	29%	71%	-%	29%	-%	48%	17%	48%	34%	13%	48%
£501-£1,000	20	11	1	8	6	6	3	6	11	18	2	9	9	-	9	11	11	10	1	11
	10%	16%	2%	10%	14%	8%	5%	16%	8%	15%	2%	13%	18%	-%	16%	21%	15%	17%	8%	15%
		b							j	j	j	j	j		j	hj	j	j		j
		54%	5%	41%	29%	27%	13%	31%	55%	91%	9%	45%	46%	-%	46%	56%	56%	51%	5%	56%
£1,001-£5,000	27	9	6	13	8	7	7	6	7	26	2	21	5	-	5	8	8	6	2	8
	13%	13%	10%	16%	19%	10%	12%	15%	5%	21%	2%	30%	10%	-%	9%	14%	11%	10%	15%	11%
									hj		hjl	hjl	hjl		hj	hj	hj			
		31%	22%	46%	28%	27%	24%	21%	24%	94%	6%	76%	18%	-%	20%	27%	29%	22%	7%	29%
£5,001-£10,000	22	6	7	9	2	12	4	4	4	22	-	18	4	-	3	7	7	5	1	7
	11%	9%	12%	11%	5%	16%	7%	10%	3%	18%	-%	25%	8%	-%	5%	12%	9%	8%	8%	9%
									hjn	hjn	hjl	hjl	j		hj	hj	j	j		j
		28%	33%	39%	9%	52%	18%	18%	20%	100%	-%	80%	20%	-%	13%	30%	30%	21%	5%	30%
OVER £10,000	32	-	13	19	-	6	17	9	10	32	-	22	10	-	10	19	19	16	2	19
	15%	-%	22%	24%	-%	9%	31%	24%	7%	27%	-%	31%	20%	-%	17%	34%	25%	27%	18%	25%
		a	a	a			de	de	j	hj		hj	hj		j	hjn	hj	hj		hj
		-%	41%	59%	-%	19%	52%	29%	32%	100%	-%	68%	32%	-%	30%	58%	58%	50%	7%	58%
Mean amount in £s	3427.9	1178.5	3630.1	5211.8	1149.0	2980.2	4892.8	4843.7	1692.0	5681.2	278.3	6899.4	4054.1	-	3337.9	5883.0	4342.9	4658.7	2854.5	4342.9
		a	a	a			d	d	j	hjn		hjl	hjl		hj	hjn	hj	hj		hj
Standard deviation	6038.3	1924.0	4522.1	8372.6	1777.3	6228.2	6565.6	7259.9	4772.8	7087.7	593.31	6797.7	7204.3	-	6817.3	7132.4	6566.4	7015.57	4234.14	6566.4
Standard error	409.90	290.05	627.11	764.31	324.49	760.90	820.70	1006.8	401.94	605.54	66.33	779.75	922.41	-	832.86	913.21	712.23	857.09	1058.53	712.23

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 48**

VALUE USED TO REPRESENT 10% INCREASE IN TOTAL ANNUAL SPEND ON MAIN ISDN SERVICE - CALCULATED FROM NUMBER OF ISDN CHANNELS AT £25 PER CHANNEL PER MONTH (A1A/A1B) OR ANNUAL SPEND (A10) OR EXAMPLE TOTAL ANNUAL SPEND OF £50,000

Base : Those who (mostly) use ISN2/2e or ISDN30

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION												
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN30		BOTH	IP		ISDN2 & IP	ISDN30	IP SWITCHED		IP NOT SWITCHED	
					£1M	£1M-£20M	£21M-£100M	OVER £100M			ONLY	ONLY		NOT	IP			ISDN	ISDN	IP	
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	*m	n	o	p	q	*r	s	
Unweighted total	217	44	52	120	30	67	64	52	141	137	80	76	61	-	67	61	85	67	16	85	
Effective Weighted Sample	165	35	51	112	21	53	58	46	98	133	49	74	60	-	55	60	73	58	14	73	
Total	209	68	61	79	40	70	54	39	139	122	87	70	52	-	57	54	75	61	13	75	
		33%	29%	38%	19%	34%	26%	19%	67%	58%	42%	33%	25%	-%	28%	26%	36%	29%	6%	36%	
Median amount in £s	240	120	240	240	120	240	240	420	240	420	180	900	240	-	240	720	420	420	240	420	
Standard deviation	246.36	304.07	140.96	218.57	292.68	243.90	192.95	222.96	188.12	293.58	140.80	*	229.23	-	220.58	245.03	244.78	238.60	280.71	244.78	
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																					

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 48**

VALUE USED TO REPRESENT 10% INCREASE IN TOTAL ANNUAL SPEND ON MAIN ISDN SERVICE - CALCULATED FROM NUMBER OF ISDN CHANNELS AT £25 PER CHANNEL PER MONTH (A1A/A1B) OR ANNUAL SPEND (A10) OR EXAMPLE TOTAL ANNUAL SPEND OF £50,000

Base : Those who (mostly) use ISN2/2e or ISDN30

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	b	*c	d	e	f	g	h	i	j	k	l	*m	n	o	p	q
Significance Level: 95%		a	b	*c	d	e	f	g	h	i	j	k	l	*m	n	o	p	q
Unweighted total	217	123	94	-	88	53	83	54	52	33	160	57	140	20	98	119	74	136
Effective Weighted Sample	165	83	91	-	60	37	80	53	44	29	127	39	115	14	78	87	51	123
Total	209	124	85	-	82	57	73	49	47	28	153	56	130	22	100	109	86	117
		59%	41%	-%	39%	27%	35%	23%	23%	13%	73%	27%	62%	11%	48%	52%	41%	56%
UP TO £250	87	87	-	-	48	39	8	10	11	10	61	26	49	12	44	43	46	39
	42%	70%	-%	-%	58%	69%	10%	20%	23%	36%	40%	46%	38%	52%	44%	40%	53%	34%
		b			fg	ghi				f							q	
		100%	-%	-%	55%	45%	9%	11%	12%	12%	70%	30%	57%	13%	50%	50%	53%	46%
£251-£500	20	20	-	-	14	6	5	1	6	3	16	4	13	3	6	14	4	16
	10%	16%	-%	-%	17%	10%	7%	2%	13%	13%	10%	8%	10%	12%	6%	13%	4%	14%
		b			g				g	g								
		100%	-%	-%	72%	28%	25%	4%	30%	17%	79%	21%	66%	13%	30%	70%	18%	82%
£501-£1,000	20	11	9	-	9	2	12	6	9	3	14	6	14	-	9	11	11	9
	10%	9%	11%	-%	11%	4%	17%	13%	18%	10%	9%	11%	11%	-%	9%	10%	13%	8%
					e				e									
		55%	45%	-%	44%	11%	60%	31%	42%	14%	70%	30%	70%	-%	44%	56%	57%	43%
£1,001-£5,000	27	6	22	-	5	2	14	12	6	2	18	9	16	2	16	12	13	11
	13%	5%	25%	-%	6%	4%	19%	25%	13%	7%	12%	16%	12%	10%	16%	11%	15%	9%
		a			de		de	dei										
		21%	79%	-%	17%	7%	49%	44%	22%	7%	67%	33%	58%	8%	57%	43%	47%	40%
£5,001-£10,000	22	-	22	-	2	3	10	12	4	3	16	6	13	3	11	11	10	12
	11%	-%	26%	-%	2%	5%	14%	25%	8%	10%	11%	10%	10%	15%	11%	10%	11%	11%
		a			d		d	deh										
		-%	100%	-%	7%	13%	45%	55%	17%	13%	74%	26%	59%	15%	51%	49%	44%	56%
OVER £10,000	32	-	32	-	5	5	25	8	12	6	27	5	25	2	15	18	3	29
	15%	-%	38%	-%	6%	9%	34%	16%	26%	24%	18%	9%	19%	11%	15%	16%	3%	25%
		a			deg				d	d							p	
		-%	100%	-%	16%	16%	77%	23%	38%	20%	85%	15%	77%	7%	46%	54%	9%	89%
Mean amount in £s	3427.9	333.1	7915.7	-	1382.1	2142.5	6119.5	5023.7	4703.9	3722.5	3574.6	3027.8	3739.3	2611.4	3282.2	3562.3	1733.9	4611.7
		a					de	de	de	d								p
Standard deviation	6038.3	528.93	7424.2	-	4007.76	5715.09	7577.42	6301.13	7416.83	4832.45	5729.6	6850.3	6006.3	3674.7	5215.5	6729.6	2852.3	7402.5
Standard error	409.90	47.69	765.74	-	427.23	785.03	831.73	857.48	1028.53	841.22	452.97	907.34	507.62	821.69	526.84	616.91	331.57	634.76
Median amount in £s	240	240	900	-	240	180	420	240	420	240	240	180	240	240	180	240	120	240
Standard deviation	246.36	188.12	*	-	203.59	155.40	302.71	276.15	262.77	217.28	229.15	288.20	244.33	96.65	241.22	249.78	291.59	197.28

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 48**

VALUE USED TO REPRESENT 10% INCREASE IN TOTAL ANNUAL SPEND ON MAIN ISDN SERVICE - CALCULATED FROM NUMBER OF ISDN CHANNELS AT £25 PER CHANNEL PER MONTH (A1A/A1B) OR ANNUAL SPEND (A10) OR EXAMPLE TOTAL ANNUAL SPEND OF £50,000

Base : Those who (mostly) use ISN2/2e or ISDN30

	Total	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
		NEVER																	
		LAST YEAR	EVER	/DK	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	*k	l	m	n	o	p	q	*r
Unweighted total	217	34	128	55	138	55	99	33	156	51	110	22	44	59	45	34	50	62	23
Effective Weighted Sample	165	25	107	37	107	39	72	25	121	41	81	15	36	55	40	28	45	53	20
Total	209	33	119	57	131	53	95	39	151	45	111	22	40	50	38	33	42	55	20
		16%	57%	27%	63%	25%	45%	19%	72%	21%	53%	11%	19%	24%	18%	16%	20%	26%	9%
UP TO £250	87	13	47	27	55	25	45	20	63	16	55	10	12	8	9	10	11	14	7
	42%	41%	39%	47%	42%	47%	48%	52%	42%	36%	50%	46%	29%	16%	23%	29%	26%	26%	34%
		15%	54%	31%	63%	29%	52%	24%	73%	19%	64%	12%	13%	9%	10%	11%	12%	16%	8%
£251-£500	20	5	10	5	9	6	7	3	15	2	9	1	4	7	5	3	7	6	4
	10%	14%	9%	9%	7%	11%	8%	8%	10%	5%	8%	6%	11%	15%	13%	8%	16%	10%	20%
		23%	51%	26%	47%	28%	36%	16%	75%	11%	45%	7%	21%	37%	25%	13%	34%	28%	20%
£501-£1,000	20	7	7	6	14	5	5	4	14	5	6	3	8	9	7	6	6	10	1
	10%	21%	6%	11%	10%	10%	5%	10%	9%	11%	5%	13%	21%	17%	18%	17%	14%	19%	5%
		b																	
		34%	36%	30%	68%	26%	24%	20%	71%	24%	29%	14%	42%	43%	33%	28%	29%	51%	5%
£1,001-£5,000	27	2	16	9	15	6	14	5	18	7	15	5	4	5	3	4	4	7	1
	13%	7%	13%	16%	12%	10%	15%	13%	12%	15%	13%	20%	11%	10%	9%	13%	9%	13%	4%
		8%	58%	34%	55%	20%	52%	19%	67%	25%	55%	16%	16%	18%	12%	15%	14%	26%	3%
£5,001-£10,000	22	2	16	5	13	7	12	4	15	7	15	1	2	6	4	5	2	3	4
	11%	5%	13%	8%	10%	12%	12%	10%	10%	16%	13%	4%	5%	11%	10%	15%	4%	5%	20%
		8%	70%	22%	58%	30%	53%	17%	68%	32%	66%	4%	8%	25%	17%	22%	8%	13%	18%
OVER £10,000	32	4	23	5	26	5	11	2	25	8	11	2	9	15	10	6	13	15	3
	15%	13%	20%	8%	19%	9%	12%	6%	16%	17%	10%	11%	23%	30%	27%	18%	31%	28%	17%
		13%	72%	15%	79%	15%	35%	7%	77%	23%	35%	7%	29%	47%	31%	18%	40%	47%	11%
Mean amount in £s	3427.9	2591.8	4021.1	2673.3	3736.8	3075.2	2927.6	2884.2	3312.6	4576.0	2769.9	3638.8	4459.3	5366.0	5231.1	3456.7	5069.1	4620.9	3565.5
Standard deviation	6038.3	5654.3	5807.8	6660.1	5969.1	7047.3	4670.2	7688.0	5346.4	8449.4	4504.2	9759.6	7858.45	7290.4	8120.06	4413.2	7837.7	7122.3	4748.1
Standard error	409.90	969.71	513.34	898.05	508.13	950.26	469.38	1338.3	428.06	1183.2	429.46	2080.7	1184.71	949.12	1210.47	756.86	1108.4	904.53	990.05
Median amount in £s	240	240	240	120	240	180	180	180	240	240	180	180	420	420	420	240	420	420	240
Standard deviation	246.36	263.77	202.96	295.97	236.13	277.17	210.88	279.31	236.49	275.31	214.05	319.11	256.71	249.52	228.58	279.19	222.20	252.08	220.20
Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																			



# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 49**

**B10. (10% INCREASE BASED ON NUMBER OF CHANNELS AT A1A/B AT £25 PER CHANNEL PER MONTH OR SPEND AT A10 OR EXAMPLE OF TOTAL BILL AT £50,000) If the price of your total bill for (ISDN2/2e/ ISDN30) increased by 10%, so an extra (10% OF ANNUAL SPEND) a year. How likely would you be to switch away from (ISDN2/2e/ ISDN30)? When answering, please assume that the price of (ISDN2/2e/ ISDN30) offered by all suppliers would increase by 10%, so there would be no financial benefit in simply switching (ISDN2/2e/ ISDN30) suppliers. Your decision will not affect the real life future prices charged for your (ISDN2/2e/ ISDN30) services by your provider(s). (SINGLE CODE)**

Base : Those who (mostly) use ISN2/2e or ISDN30

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	IP SWITCHED	IP NOT SWITCHED	ANY IP	
					£1M	£1M-£20M	£21M-£100M	OVER £100M												
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q	r	s
Unweighted total	217	44	52	120	30	67	64	52	141	137	80	76	61	-	67	61	85	67	16	85
Effective Weighted Sample	165	35	51	112	21	53	58	46	98	133	49	74	60	-	55	60	73	58	14	73
Total	209	68	61	79	40	70	54	39	139	122	87	70	52	-	57	54	75	61	13	75
		33%	29%	38%	19%	34%	26%	19%	67%	58%	42%	33%	25%	-%	28%	26%	36%	29%	6%	36%
We would definitely switch away from (ISDN2/2e/ ISDN30)	85	25	32	28	11	29	29	15	58	53	32	26	26	-	29	26	36	34	2	36
	41%	36%	52%	36%	29%	41%	53%	37%	42%	43%	36%	38%	51%	-%	50%	47%	48%	56%	17%	48%
			c															jk		
		29%	38%	33%	14%	34%	34%	17%	69%	62%	38%	31%	31%	-%	34%	30%	42%	40%	3%	42%
We would be likely to switch away from (ISDN2/2e/ ISDN30)	86	27	23	37	22	25	21	15	56	50	36	31	19	-	19	18	25	23	1	25
	41%	39%	38%	46%	55%	35%	39%	38%	40%	41%	42%	44%	37%	-%	33%	33%	33%	38%	9%	33%
		31%	27%	43%	25%	29%	25%	17%	64%	58%	42%	36%	22%	-%	22%	21%	29%	27%	1%	29%
It would have no impact (would keep (ISDN2/2e/ ISDN30))	29	13	5	11	6	12	4	7	20	14	15	9	5	-	9	9	12	4	9	12
	14%	19%	8%	14%	14%	17%	8%	19%	15%	12%	17%	13%	10%	-%	15%	16%	17%	6%	68%	17%
		45%	17%	38%	19%	41%	15%	25%	70%	48%	52%	30%	18%	-%	30%	30%	42%	12%	30%	42%
Don't know	8	4	1	3	1	5	-	2	5	5	4	3	1	-	1	2	2	-	1	2
	4%	6%	2%	4%	3%	6%	-%	5%	4%	4%	5%	5%	2%	-%	2%	3%	2%	-%	6%	2%
		50%	12%	38%	13%	54%	-%	24%	59%	53%	47%	41%	12%	-%	12%	21%	21%	-%	9%	21%
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																				

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 49**

**B10. (10% INCREASE BASED ON NUMBER OF CHANNELS AT A1A/B AT £25 PER CHANNEL PER MONTH OR SPEND AT A10 OR EXAMPLE OF TOTAL BILL AT £50,000) If the price of your total bill for (ISDN2/2e/ ISDN30) increased by 10%, so an extra (10% OF ANNUAL SPEND) a year. How likely would you be to switch away from (ISDN2/2e/ ISDN30)? When answering, please assume that the price of (ISDN2/2e/ ISDN30) offered by all suppliers would increase by 10%, so there would be no financial benefit in simply switching (ISDN2/2e/ ISDN30) suppliers. Your decision will not affect the real life future prices charged for your (ISDN2/2e/ ISDN30) services by your provider(s). (SINGLE CODE)**

Base : Those who (mostly) use ISN2/2e or ISDN30

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN30		IP *c	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES j	NO/DK k	YES l	NO/DK *m	10 YEARS n	10+ YEARS o	£100K p	£100K+ q
		ISDN2 a	b															
Significance Level: 95%	a	b	*c	d	e	f	g	h	i	j	k	l	*m	n	o	p	q	
Unweighted total	217	123	94	-	88	53	83	54	52	33	160	57	140	20	98	119	74	136
Effective Weighted Sample	165	83	91	-	60	37	80	53	44	29	127	39	115	14	78	87	51	123
Total	209	124	85	-	82	57	73	49	47	28	153	56	130	22	100	109	86	117
		59%	41%	-%	39%	27%	35%	23%	23%	13%	73%	27%	62%	11%	48%	52%	41%	56%
We would definitely switch away from (ISDN2/2e/ ISDN30)	85	50	34	-	33	25	35	18	25	11	75	10	68	6	44	40	22	62
	41%	41%	40%	-%	40%	44%	48%	37%	53%	39%	49%	18%	52%	29%	44%	37%	25%	53%
		59%	41%	-%	39%	29%	41%	21%	30%	13%	88%	12%	81%	8%	53%	47%	26%	73%
We would be likely to switch away from (ISDN2/2e/ ISDN30)	86	52	35	-	32	24	26	24	14	10	58	28	47	11	50	36	41	43
	41%	42%	41%	-%	38%	42%	36%	49%	31%	37%	38%	51%	36%	48%	50%	33%	47%	37%
		60%	40%	-%	37%	28%	31%	28%	17%	12%	67%	33%	55%	12%	58%	42%	47%	50%
It would have no impact (would keep (ISDN2/2e/ ISDN30))	29	18	11	-	14	6	8	6	7	6	17	12	12	5	6	24	19	9
	14%	14%	13%	-%	17%	11%	11%	12%	14%	21%	11%	21%	9%	23%	6%	22%	22%	8%
		61%	39%	-%	48%	22%	29%	20%	23%	20%	59%	41%	42%	18%	19%	81%	66%	32%
Don't know	8	4	5	-	4	1	3	1	1	1	3	6	3	-	-	8	5	2
	4%	3%	5%	-%	4%	3%	5%	2%	2%	3%	2%	10%	2%	-%	-%	8%	5%	2%
		47%	53%	-%	42%	17%	41%	12%	12%	9%	33%	67%	33%	-%	-%	100%	54%	28%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 49**

**B10. (10% INCREASE BASED ON NUMBER OF CHANNELS AT A1A/B AT £25 PER CHANNEL PER MONTH OR SPEND AT A10 OR EXAMPLE OF TOTAL BILL AT £50,000) If the price of your total bill for (ISDN2/2e/ ISDN30) increased by 10%, so an extra (10% OF ANNUAL SPEND) a year. How likely would you be to switch away from (ISDN2/2e/ ISDN30)? When answering, please assume that the price of (ISDN2/2e/ ISDN30) offered by all suppliers would increase by 10%, so there would be no financial benefit in simply switching (ISDN2/2e/ ISDN30) suppliers. Your decision will not affect the real life future prices charged for your (ISDN2/2e/ ISDN30) services by your provider(s). (SINGLE CODE)**

Base : Those who (mostly) use ISN2/2e or ISDN30

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
	Total	NEVER			YES	NO	YES	NO/DK	UP TO		YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
		LAST YEAR	EVER	/DK					3 YEARS	4+ YEARS									
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	*k	l	m	n	o	p	q	*r
Unweighted total	217	34	128	55	138	55	99	33	156	51	110	22	44	59	45	34	50	62	23
Effective Weighted Sample	165	25	107	37	107	39	72	25	121	41	81	15	36	55	40	28	45	53	20
Total	209	33	119	57	131	53	95	39	151	45	111	22	40	50	38	33	42	55	20
		16%	57%	27%	63%	25%	45%	19%	72%	21%	53%	11%	19%	24%	18%	16%	20%	26%	9%
We would definitely switch away from (ISDN2/2e/ ISDN30)	85	19	58	7	75	7	42	6	74	11	45	3	22	25	21	14	22	31	5
	41%	58%	49%	13%	57%	12%	45%	16%	49%	25%	41%	15%	56%	50%	56%	42%	53%	56%	27%
		c	c		e		g		i										
		23%	69%	9%	89%	8%	50%	7%	87%	13%	54%	4%	26%	29%	25%	16%	26%	36%	6%
We would be likely to switch away from (ISDN2/2e/ ISDN30)	86	12	55	19	52	17	41	21	60	19	50	11	14	14	12	13	12	19	6
	41%	35%	47%	34%	40%	32%	43%	53%	40%	43%	45%	51%	36%	29%	33%	39%	28%	34%	32%
		13%	64%	22%	60%	20%	47%	24%	69%	22%	58%	13%	17%	16%	14%	15%	13%	21%	7%
It would have no impact (would keep (ISDN2/2e/ ISDN30))	29	2	4	23	4	24	6	11	17	12	13	4	3	10	4	6	6	5	7
	14%	7%	4%	40%	3%	45%	7%	27%	11%	26%	12%	18%	8%	20%	12%	19%	15%	9%	36%
		7%	15%	ab	14%	d	21%	f	58%	h	44%	14%	10%	34%	15%	21%	21%	18%	25%
Don't know	8	-	1	8	*	6	5	2	*	3	3	4	-	1	-	-	2	1	1
	4%	-%	1%	14%	*%	11%	5%	4%	*%	6%	3%	16%	-%	2%	-%	-%	4%	1%	5%
				b		d				h									
		-%	9%	91%	5%	69%	60%	18%	5%	31%	37%	42%	-%	9%	-%	-%	21%	9%	12%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 50**

## **B10C. What would you switch to instead of (ISDN2/2e/ ISDN30)? (MULTI CODE)**

Base : Those who would definitely switch/ would be likely to switch from their main ISDN service if the price of their total bill increased by 10%

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											IP		IP NOT	ANY
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN	IP SWITCHED	IP NOT SWITCHED				
					£1M	£1M-£20M	£21M-£100M	£100M															
Significance Level: 95%		a	b	c	*d	e	f	g	h	i	j	k	l	*m	n	o	p	q	*r	s			
Unweighted total	179	34	47	97	26	54	57	39	117	116	63	62	54	-	56	49	69	63	5	69			
Effective Weighted Sample	140	27	46	91	18	45	52	35	84	113	40	60	53	-	45	48	58	54	4	58			
Total	171	51	55	65	33	54	50	29	114	103	68	57	46	-	48	44	61	57	3	61			
		30%	32%	38%	20%	31%	29%	17%	67%	60%	40%	33%	27%	-%	28%	26%	36%	33%	2%	36%			
IP based alternatives to ISDN (e.g. SIP trunks, hosted VOIP)	76	21	23	32	14	18	26	17	51	50	26	25	25	-	24	25	30	29	1	30			
	44%	42%	41%	49%	41%	34%	53%	57%	45%	49%	38%	44%	55%	-%	50%	58%	50%	51%	23%	50%			
		28%	30%	42%	18%	24%	35%	22%	67%	66%	34%	33%	33%	-%	32%	33%	40%	38%	1%	40%			
Mobile phones (including Smartphones)	73	21	26	26	14	16	23	16	55	41	32	18	23	-	27	25	35	33	2	35			
	43%	41%	47%	41%	43%	30%	47%	55%	48%	40%	47%	32%	50%	-%	56%	57%	57%	58%	47%	57%			
		29%	35%	36%	20%	22%	32%	22%	75%	56%	44%	25%	31%	-%	36%	34%	48%	45%	2%	48%			
Cable modem or ADSL	64	12	22	30	10	15	22	16	45	49	15	20	29	-	28	28	34	34	1	34			
	37%	23%	41%	46%	30%	28%	44%	55%	39%	47%	22%	34%	64%	-%	60%	64%	57%	59%	23%	57%			
		19%	35%	47%	16%	23%	35%	25%	70%	76%	24%	30%	hijk	-%	hjk	hijk	hjk	hjk	1%	hjk			
Leased lines	54	15	15	25	7	14	17	13	38	36	19	17	19	-	15	16	18	17	1	18			
	32%	29%	26%	38%	22%	26%	34%	44%	33%	35%	27%	29%	41%	-%	31%	36%	30%	29%	23%	30%			
		27%	27%	46%	14%	26%	31%	24%	69%	66%	34%	31%	35%	-%	27%	29%	33%	31%	1%	33%			
Virtual Private Networks	52	8	23	21	8	13	18	13	33	37	15	19	18	-	21	20	27	26	1	27			
	31%	16%	41%	32%	25%	23%	35%	44%	29%	36%	22%	33%	39%	-%	43%	45%	44%	45%	35%	44%			
		16%	44%	40%	16%	24%	34%	25%	64%	71%	29%	36%	34%	-%	39%	38%	51%	49%	2%	51%			
ISDN 30 channels	52	11	17	24	7	13	15	12	52	25	27	-	25	-	21	17	21	20	1	21			
	30%	22%	30%	36%	22%	24%	30%	41%	45%	24%	40%	-%	53%	-%	44%	38%	35%	34%	35%	35%			
		22%	32%	46%	14%	25%	30%	23%	100%	48%	52%	-%	48%	-%	41%	33%	41%	38%	2%	41%			
SDSL	48	8	18	21	5	13	14	15	39	30	17	9	22	-	24	18	25	23	2	25			
	28%	15%	33%	33%	14%	25%	27%	52%	34%	30%	25%	15%	48%	-%	50%	41%	41%	40%	64%	41%			
		17%	38%	45%	10%	28%	29%	32%	k	k	36%	18%	ijk	-%	50%	k	k	k	5%	52%			
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																							

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 50**

## **B10C. What would you switch to instead of (ISDN2/2e/ ISDN30)? (MULTI CODE)**

Base : Those who would definitely switch/ would be likely to switch from their main ISDN service if the price of their total bill increased by 10%

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											IP SWITCHED		IP NOT SWITCHED		ANY IP
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	ISDN	ISDN					
					£1M	£1M-£20M	£21M-£100M	OVER £100M																
Significance Level: 95%		a	b	c	*d	e	f	g	h	i	j	k	l	*m	n	o	p	q	*r	s				
Unweighted total	179	34	47	97	26	54	57	39	117	116	63	62	54	-	56	49	69	63	5	69				
Effective Weighted Sample	140	27	46	91	18	45	52	35	84	113	40	60	53	-	45	48	58	54	4	58				
Total	171	51	55	65	33	54	50	29	114	103	68	57	46	-	48	44	61	57	3	61				
		30%	32%	38%	20%	31%	29%	17%	67%	60%	40%	33%	27%	-%	28%	26%	36%	33%	2%	36%				
Analogue telephone line(s) i.e. fixed telephone lines that are not ISDN lines	44	12	8	23	7	9	10	17	33	31	14	11	19	-	20	21	24	21	3	24				
	26%	24%	15%	36%	20%	17%	20%	59%	29%	30%	20%	19%	42%	-%	41%	48%	39%	37%	76%	39%				
			b					ef				jk		-%	jk	hijk	jk	k		jk				
		28%	19%	53%	15%	21%	23%	39%	75%	69%	31%	25%	44%	-%	45%	47%	54%	48%	6%	54%				
ISDN 2/2e channels or Business Highway	30	7	14	8	4	8	15	3	9	30	-	21	9	-	7	16	16	16	-	16				
	17%	14%	26%	12%	11%	15%	29%	11%	8%	29%	-%	36%	19%	-%	15%	38%	27%	29%	-%	27%				
			c				g			hj		hijn	hj		j	hijn	hj	hj		hj				
		24%	49%	27%	12%	27%	50%	11%	30%	100%	-%	70%	30%	-%	25%	56%	56%	56%	-%	56%				
Ethernet	26	7	8	12	6	4	9	7	18	19	8	8	11	-	11	14	16	15	1	16				
	15%	13%	15%	18%	19%	8%	17%	24%	16%	18%	11%	14%	24%	-%	24%	32%	27%	27%	23%	27%				
				e												hjk								
		25%	31%	44%	24%	16%	33%	27%	70%	71%	29%	30%	41%	-%	42%	54%	62%	58%	3%	62%				
Other business communications services	8	-	5	3	-	4	2	2	6	3	5	2	2	-	1	1	1	1	-	1				
	5%	-%	9%	4%	-%	8%	4%	5%	5%	3%	7%	3%	3%	-%	2%	2%	1%	1%	-%	1%				
		-%	65%	35%	-%	53%	27%	20%	77%	43%	57%	23%	20%	-%	10%	10%	10%	10%	-%	10%				
Don't know	6	1	3	1	-	5	1	-	3	4	2	3	1	-	2	1	2	2	-	2				
	3%	2%	6%	2%	-%	9%	2%	-%	2%	4%	3%	5%	2%	-%	5%	2%	4%	4%	-%	4%				
		19%	60%	21%	-%	82%	18%	-%	49%	69%	31%	51%	18%	-%	42%	18%	42%	42%	-%	42%				
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																								

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 50

## B10C. What would you switch to instead of (ISDN2/2e/ ISDN30)? (MULTI CODE)

Base : Those who would definitely switch/ would be likely to switch from their main ISDN service if the price of their total bill increased by 10%

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
Significance Level: 95%		a	b	*c	d	e	f	g	h	*i	j	k	l	*m	n	o	p	q
Unweighted total	179	103	76	-	71	46	69	47	44	25	138	41	122	16	91	88	54	121
Effective Weighted Sample	140	72	74	-	51	33	67	46	37	22	111	29	100	12	72	69	37	109
Total	171	102	69	-	65	49	61	42	40	21	133	38	116	17	95	76	62	105
		60%	40%	-%	38%	29%	36%	25%	23%	12%	78%	22%	68%	10%	55%	45%	37%	61%
IP based alternatives to ISDN (e.g. SIP trunks, hosted VOIP)	76	44	32	-	28	23	32	18	23	7	60	16	51	9	35	41	28	48
	44%	43%	46%	-%	43%	47%	53%	43%	59%	33%	45%	41%	45%	51%	37%	53%	44%	46%
		58%	42%	-%	36%	31%	43%	24%	31%	9%	79%	21%	68%	12%	46%	54%	37%	63%
Mobile phones (including Smartphones)	73	50	24	-	39	16	27	15	22	12	58	15	53	5	45	28	28	45
	43%	49%	34%	-%	60%	33%	44%	35%	56%	59%	44%	40%	46%	31%	48%	37%	45%	43%
		68%	32%	-%	53%	22%	36%	20%	31%	17%	79%	21%	72%	7%	61%	39%	38%	61%
Cable modem or ADSL	64	36	28	-	23	21	32	17	28	7	57	7	54	3	32	32	13	50
	37%	36%	40%	-%	36%	44%	52%	40%	69%	32%	43%	19%	47%	16%	34%	41%	21%	47%
		57%	43%	-%	36%	34%	50%	26%	43%	11%	89%	11%	84%	4%	50%	50%	20%	77%
Leased lines	54	35	19	-	23	15	22	13	11	7	48	6	42	6	35	20	16	35
	32%	35%	28%	-%	35%	30%	36%	32%	27%	33%	36%	16%	37%	34%	37%	26%	26%	34%
		65%	35%	-%	42%	27%	41%	25%	20%	13%	88%	12%	78%	11%	64%	36%	30%	65%
Virtual Private Networks	52	28	25	-	15	18	23	14	22	5	47	5	45	3	30	23	10	41
	31%	27%	36%	-%	23%	38%	37%	34%	55%	23%	36%	13%	39%	15%	31%	30%	17%	39%
		53%	47%	-%	28%	35%	44%	27%	42%	9%	91%	9%	86%	5%	57%	43%	20%	78%
ISDN 30 channels	52	52	-	-	34	17	14	10	16	5	41	11	35	6	22	29	15	35
	30%	51%	-%	-%	53%	35%	23%	25%	41%	24%	31%	28%	30%	34%	24%	38%	24%	34%
		b			fg													
		100%	-%	-%	67%	33%	28%	20%	31%	10%	79%	21%	68%	11%	43%	57%	29%	69%
SDSL	48	33	15	-	23	16	17	13	19	6	38	9	37	2	22	26	10	37
	28%	33%	21%	-%	35%	34%	28%	32%	47%	30%	29%	24%	32%	9%	23%	34%	16%	35%
		69%	31%	-%	47%	35%	36%	28%	39%	13%	80%	20%	77%	3%	46%	54%	21%	78%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 50**

## **B10C. What would you switch to instead of (ISDN2/2e/ ISDN30)? (MULTI CODE)**

Base : Those who would definitely switch/ would be likely to switch from their main ISDN service if the price of their total bill increased by 10%

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	b	*c	d	e	f	g	h	*i	j	k	l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	179	103	76	-	71	46	69	47	44	25	138	41	122	16	91	88	54	121
Effective Weighted Sample	140	72	74	-	51	33	67	46	37	22	111	29	100	12	72	69	37	109
Total	171	102	69	-	65	49	61	42	40	21	133	38	116	17	95	76	62	105
		60%	40%	-%	38%	29%	36%	25%	23%	12%	78%	22%	68%	10%	55%	45%	37%	61%
Analogue telephone line(s) i.e. fixed telephone lines that are not ISDN lines	44	31	13	-	25	8	21	10	20	3	41	3	39	2	22	22	9	34
	26%	30%	19%	-%	39%	16%	34%	24%	51%	15%	31%	7%	34%	13%	23%	29%	14%	32%
		69%	31%	-%	57%	18%	47%	22%	46%	7%	94%	6%	89%	5%	49%	51%	20%	77%
ISDN 2/2e channels or Business Highway	30	-	30	-	4	4	20	10	12	5	25	4	24	1	18	11	7	22
	17%	-%	43%	-%	7%	9%	32%	24%	29%	23%	19%	12%	21%	6%	19%	15%	11%	21%
		a	a		de	de	de	d	de	de								
		-%	100%	-%	15%	15%	66%	34%	39%	17%	85%	15%	81%	3%	62%	38%	24%	73%
Ethernet	26	16	10	-	9	9	13	6	15	1	25	2	23	1	12	15	9	18
	15%	16%	15%	-%	14%	19%	21%	14%	38%	7%	19%	5%	20%	8%	13%	19%	14%	17%
		61%	39%	-%	35%	35%	48%	23%	57%	5%	93%	7%	88%	5%	45%	55%	33%	67%
Other business communications services	8	6	2	-	3	4	1	3	1	-	5	3	5	-	3	5	3	5
	5%	6%	3%	-%	4%	7%	1%	6%	2%	-%	4%	7%	4%	-%	3%	6%	4%	5%
		77%	23%	-%	33%	45%	10%	33%	10%	-%	64%	36%	64%	-%	40%	60%	35%	65%
Don't know	6	3	3	-	3	-	3	1	-	2	4	2	4	-	4	2	3	3
	3%	3%	4%	-%	4%	-%	5%	2%	-%	12%	3%	5%	3%	-%	4%	3%	4%	3%
		49%	51%	-%	49%	-%	51%	18%	-%	42%	67%	33%	67%	-%	61%	39%	44%	56%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 50**

## **B10C. What would you switch to instead of (ISDN2/2e/ ISDN30)? (MULTI CODE)**

Base : Those who would definitely switch/ would be likely to switch from their main ISDN service if the price of their total bill increased by 10%

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%		a	b	*c	d	*e	f	*g	h	i	j	*k	l	m	n	*o	p	q	*r
Unweighted total	179	32	121	26	132	29	86	24	137	37	96	14	40	48	40	27	41	54	15
Effective Weighted Sample	140	23	101	18	103	25	64	20	107	32	74	10	33	44	36	21	38	46	13
Total	171	31	114	27	127	24	84	27	133	30	95	15	37	39	33	26	34	49	12
		18%	66%	16%	74%	14%	49%	16%	78%	18%	56%	9%	22%	23%	20%	15%	20%	29%	7%
IP based alternatives to ISDN (e.g. SIP trunks, hosted VOIP)	76	17	50	10	68	4	36	10	59	15	41	5	21	23	15	11	19	28	3
	44%	54%	44%	37%	53%	18%	43%	37%	44%	50%	43%	32%	56%	59%	46%	40%	56%	56%	23%
		22%	65%	13%	89%	6%	47%	13%	78%	20%	54%	6%	27%	30%	20%	14%	25%	36%	3%
Mobile phones (including Smartphones)	73	21	41	11	60	6	31	8	56	14	33	6	22	25	20	12	22	28	7
	43%	68%	36%	42%	47%	27%	37%	29%	42%	47%	34%	40%	59%	65%	59%	47%	65%	57%	58%
		b																	
		29%	56%	15%	82%	9%	42%	11%	76%	19%	44%	8%	29%	34%	27%	17%	30%	38%	9%
Cable modem or ADSL	64	15	45	4	58	3	27	2	55	9	29	1	25	25	17	12	22	30	4
	37%	48%	40%	15%	46%	13%	33%	9%	41%	31%	30%	7%	68%	64%	50%	47%	65%	62%	35%
		23%	70%	6%	91%	5%	42%	4%	85%	15%	45%	2%	39%	39%	26%	19%	35%	47%	6%
Leased lines	54	14	35	5	44	5	33	3	42	12	35	1	12	14	8	5	13	15	3
	32%	46%	31%	18%	35%	22%	40%	10%	32%	38%	37%	10%	32%	36%	23%	18%	37%	31%	23%
		26%	65%	9%	81%	9%	62%	5%	78%	21%	64%	3%	22%	26%	14%	9%	23%	28%	5%
Virtual Private Networks	52	10	41	2	49	1	21	5	44	8	24	2	19	19	13	10	17	25	2
	31%	32%	36%	6%	39%	4%	25%	18%	33%	28%	25%	11%	52%	49%	40%	37%	50%	51%	14%
		19%	78%	3%	94%	2%	39%	9%	84%	16%	46%	3%	37%	37%	26%	19%	33%	48%	3%
ISDN 30 channels	52	17	29	6	41	6	22	8	41	10	30	-	15	17	13	7	14	17	4
	30%	54%	26%	22%	32%	26%	27%	31%	31%	32%	32%	-%	42%	43%	37%	26%	40%	34%	37%
		b																	
		32%	56%	12%	80%	12%	43%	16%	80%	19%	59%	-%	30%	32%	24%	14%	27%	33%	8%
SDSL	48	12	31	4	40	4	20	3	37	11	22	1	22	14	18	8	17	23	2
	28%	39%	28%	17%	31%	19%	24%	10%	28%	35%	23%	7%	61%	37%	53%	32%	49%	46%	19%
													m						
		25%	66%	9%	83%	9%	42%	6%	78%	22%	46%	2%	47%	30%	37%	18%	35%	48%	5%
Columns Tested:	a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																		

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r



# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 50**

## **B10C. What would you switch to instead of (ISDN2/2e/ ISDN30)? (MULTI CODE)**

Base : Those who would definitely switch/ would be likely to switch from their main ISDN service if the price of their total bill increased by 10%

	SWITCHING ISDN SUPPLIER				CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%		a	b	*c	d	*e	f	*g	h	i	j	*k	l	m	n	*o	p	q	*r
Unweighted total	179	32	121	26	132	29	86	24	137	37	96	14	40	48	40	27	41	54	15
Effective Weighted Sample	140	23	101	18	103	25	64	20	107	32	74	10	33	44	36	21	38	46	13
Total	171	31	114	27	127	24	84	27	133	30	95	15	37	39	33	26	34	49	12
		18%	66%	16%	74%	14%	49%	16%	78%	18%	56%	9%	22%	23%	20%	15%	20%	29%	7%
Analogue telephone line(s) i.e. fixed telephone lines that are not ISDN lines	44	16	24	4	39	3	19	1	38	6	21	-	17	18	15	8	15	20	3
	26%	52%	21%	15%	31%	13%	23%	5%	29%	20%	21%	-%	45%	47%	46%	31%	45%	41%	28%
		b																	
		36%	55%	9%	88%	7%	43%	3%	87%	13%	46%	-%	38%	41%	35%	19%	35%	46%	7%
ISDN 2/2e channels or Business Highway	30	3	24	3	24	4	10	3	24	5	12	1	10	14	9	5	11	15	1
	17%	10%	21%	11%	19%	15%	13%	10%	18%	18%	13%	7%	28%	37%	28%	19%	34%	31%	9%
		10%	80%	10%	81%	12%	35%	9%	82%	18%	41%	3%	35%	49%	31%	17%	39%	52%	3%
Ethernet	26	8	17	2	22	2	7	3	22	4	10	-	12	12	12	6	10	15	1
	15%	27%	15%	6%	18%	9%	9%	10%	17%	13%	11%	-%	33%	31%	35%	24%	28%	31%	10%
		31%	63%	6%	85%	8%	27%	11%	83%	15%	38%	-%	46%	45%	44%	24%	36%	58%	5%
Other business communications services	8	1	6	1	6	*	6	1	5	1	7	-	1	1	1	-	1	1	-
	5%	3%	5%	5%	5%	2%	7%	5%	4%	5%	8%	-%	2%	2%	2%	-%	2%	2%	-%
		10%	73%	17%	77%	5%	73%	17%	65%	17%	90%	-%	10%	10%	10%	-%	10%	10%	-%
Don't know	6	-	3	2	-	2	-	3	3	1	1	2	-	-	1	2	-	-	2
	3%	-%	3%	9%	-%	9%	-%	13%	3%	4%	1%	16%	-%	-%	4%	9%	-%	-%	21%
		-%	60%	40%	-%	39%	-%	58%	60%	21%	18%	40%	-%	-%	24%	42%	-%	-%	42%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 51**

**B10B. By what percentage would the price you pay for (ISDN2/2e/ ISDN30) have to increase (assuming the prices of other communication services do not increase) for you to definitely switch away from (ISDN2/2e/ ISDN30)? (SINGLE CODE)**

Base : Those who would not be likely to switch from their main ISDN service if the price of their total bill increased by 10%

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION												
	Total	1-49 *a	50-249 *b	250+ *c	UNDER				ISDN2 *h	ISDN30 *i	ISDN2 ONLY *j	ISDN30 ONLY *k	BOTH ISDN *l	IP NOT ISDN *m	ISDN2 & IP *n	ISDN30 & IP *o	ISDN & IP *p	IP	IP NOT	ANY IP *s	
					£1M *d	£1M- £20M *e	£21M-£100M *f	OVER £100M *g										SWITCHED *q	SWITCHED *r		
Significance Level: 95%																					
Unweighted total	38	10	5	23	4	13	7	13	24	21	17	14	7	-	11	12	16	4	11	16	
Effective Weighted Sample	26	8	5	21	3	9	6	12	14	21	9	14	7	-	10	12	15	4	10	15	
Total	38	17	6	14	7	17	4	9	25	19	19	12	6	-	10	11	14	4	10	14	
		46%	16%	38%	18%	44%	11%	25%	67%	49%	51%	33%	16%	-%	26%	28%	38%	10%	25%	38%	
1%-10%	3	3	-	-	-	3	-	-	3	-	3	-	-	-	-	-	-	-	-	-	
	8%	18%	-%	-%	-%	19%	-%	-%	12%	-%	16%	-%	-%	-%	-%	-%	-%	-%	-%	-%	
		100%	-%	-%	-%	100%	-%	-%	100%	-%	100%	-%	-%	-%	-%	-%	-%	-%	-%	-%	
11%-20%	12	5	2	5	1	6	1	4	6	8	5	6	2	-	3	5	7	-	7	7	
	33%	28%	41%	36%	21%	37%	18%	42%	24%	42%	24%	50%	25%	-%	30%	49%	46%	-%	69%	46%	
		39%	20%	42%	11%	50%	6%	32%	50%	63%	37%	50%	13%	-%	24%	42%	53%	-%	53%	53%	
21%-30%	6	3	-	3	3	*	1	2	5	1	5	1	-	-	*	-	*	-	*	*	
	16%	18%	-%	20%	47%	3%	20%	17%	21%	4%	27%	6%	-%	-%	4%	-%	3%	-%	4%	3%	
		52%	-%	48%	52%	7%	14%	27%	87%	13%	87%	13%	-%	-%	7%	-%	7%	-%	7%	7%	
31%-40%	1	1	-	-	-	1	-	-	-	1	-	1	-	-	-	-	-	-	-	-	
	3%	6%	-%	-%	-%	7%	-%	-%	-%	6%	-%	9%	-%	-%	-%	-%	-%	-%	-%	-%	
		100%	-%	-%	-%	100%	-%	-%	-%	100%	-%	100%	-%	-%	-%	-%	-%	-%	-%	-%	
41%-50%	5	3	-	2	-	4	1	-	4	2	4	1	1	-	1	2	2	2	-	2	
	14%	18%	-%	14%	-%	24%	28%	-%	17%	8%	18%	6%	13%	-%	8%	15%	11%	44%	-%	11%	
		61%	-%	39%	-%	76%	24%	-%	85%	31%	69%	15%	15%	-%	15%	31%	31%	31%	-%	31%	
51%-60%	1	1	-	-	1	-	-	-	1	1	-	-	1	-	1	1	1	1	-	1	
	3%	6%	-%	-%	15%	-%	-%	-%	4%	5%	-%	-%	16%	-%	10%	9%	7%	28%	-%	7%	
		100%	-%	-%	100%	-%	-%	-%	100%	100%	-%	-%	100%	-%	100%	100%	100%	100%	-%	100%	
Don't know	9	1	3	4	1	2	1	4	5	6	3	3	3	-	5	3	5	1	3	5	
	24%	6%	59%	31%	17%	11%	34%	41%	22%	34%	14%	28%	46%	-%	47%	27%	33%	29%	27%	33%	
		13%	38%	49%	13%	20%	16%	42%	61%	71%	29%	39%	32%	-%	52%	32%	52%	11%	29%	52%	
Mean percentage	26.7	27.7	20.0	26.7	27.3	27.5	34.1	20.2	27.5	28.4	25.4	24.8	37.7	-	29.7	30.0	27.2	52.3	17.9	27.2	
Standard deviation	14.23	16.31	*	12.57	16.05	15.84	16.82	3.81	15.58	14.45	14.39	11.25	20.02	-	19.62	17.01	16.53	3.74	3.92	16.53	
Standard error	2.74	5.44	*	3.14	9.27	4.78	7.52	1.35	3.78	3.86	3.99	3.56	10.01	-	8.01	5.67	4.98	2.16	1.39	4.98	
Median percentage	20	25	20	20	25	20	25	20	25	20	25	20	50	-	20	20	20	50	20	20	
Standard deviation	14.23	16.31	-	12.57	16.05	15.84	16.82	3.81	15.58	14.45	14.39	11.25	20.02	-	19.62	17.01	16.53	3.74	3.92	16.53	
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																					

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 51**

**B10B. By what percentage would the price you pay for (ISDN2/2e/ ISDN30) have to increase (assuming the prices of other communication services do not increase) for you to definitely switch away from (ISDN2/2e/ ISDN30)? (SINGLE CODE)**

Base : Those who would not be likely to switch from their main ISDN service if the price of their total bill increased by 10%

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN30			ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		ISDN2	IP															
Significance Level: 95%		*a	*b	*c	*d	*e	*f	*g	*h	*i	*j	*k	*l	*m	*n	o	*p	*q
Unweighted total	38	20	18	-	17	7	14	7	8	8	22	16	18	4	7	31	20	15
Effective Weighted Sample	26	12	18	-	10	4	14	7	7	8	16	10	16	2	6	20	13	13
Total	38	22	16	-	18	8	12	7	8	7	20	18	15	5	6	32	24	12
		58%	42%	-%	47%	21%	31%	18%	20%	17%	53%	47%	40%	14%	15%	85%	63%	31%
1%-10%	3	3	-	-	3	-	-	-	-	-	-	3	-	-	-	3	3	-
	8%	14%	-%	-%	18%	-%	-%	-%	-%	-%	-%	18%	-%	-%	-%	10%	13%	-%
		100%	-%	-%	100%	-%	-%	-%	-%	-%	-%	100%	-%	-%	-%	100%	100%	-%
11%-20%	12	5	8	-	5	1	7	1	3	3	7	5	7	-	1	11	7	5
	33%	21%	49%	-%	28%	15%	57%	15%	42%	51%	37%	28%	49%	-%	22%	35%	29%	45%
		37%	63%	-%	40%	10%	55%	8%	26%	27%	60%	40%	60%	-%	10%	90%	57%	43%
21%-30%	6	5	1	-	2	3	1	-	*	-	2	4	1	1	*	6	5	1
	16%	24%	5%	-%	12%	40%	7%	-%	5%	-%	12%	20%	8%	24%	8%	17%	20%	11%
		87%	13%	-%	35%	52%	13%	-%	7%	-%	41%	59%	21%	20%	7%	93%	79%	21%
31%-40%	1	-	1	-	-	-	-	1	-	-	-	1	-	-	1	-	1	-
	3%	-%	7%	-%	-%	-%	-%	17%	-%	-%	-%	6%	-%	-%	20%	-%	5%	-%
		-%	100%	-%	-%	-%	-%	100%	-%	-%	-%	100%	-%	-%	100%	-%	100%	-%
41%-50%	5	4	1	-	4	-	1	1	2	-	5	*	2	3	1	4	5	*
	14%	20%	5%	-%	25%	-%	7%	12%	21%	-%	23%	2%	11%	61%	14%	13%	20%	4%
		85%	15%	-%	85%	-%	15%	15%	31%	-%	92%	8%	31%	61%	15%	85%	92%	8%
51%-60%	1	-	1	-	-	1	-	1	-	1	1	-	1	-	1	-	1	-
	3%	-%	6%	-%	-%	13%	-%	15%	-%	15%	5%	-%	7%	-%	18%	-%	4%	-%
		-%	100%	-%	-%	100%	-%	100%	-%	100%	100%	-%	100%	-%	100%	-%	100%	-%
Don't know	9	4	5	-	3	2	3	3	2	2	5	4	4	1	1	8	2	5
	24%	21%	28%	-%	17%	32%	30%	42%	32%	34%	23%	25%	25%	15%	19%	25%	9%	41%
		50%	50%	-%	34%	28%	39%	32%	27%	25%	51%	49%	42%	9%	11%	89%	25%	53%
Mean percentage	26.7	26.5	26.9	-	26.7	29.7	22.5	41.0	27.3	26.9	31.2	21.3	26.7	43.0	38.5	24.5	28.3	21.6
Standard deviation	14.23	15.00	13.67	-	16.47	14.19	9.81	15.83	17.15	18.11	15.98	9.91	15.13	12.79	15.97	13.06	15.52	8.06
Standard error	2.74	4.01	3.79	-	4.57	7.09	3.10	7.92	7.00	8.10	3.88	3.14	4.04	7.38	6.52	2.85	3.76	2.55
Median percentage	20	25	20	-	20	25	20	40	20	20	25	20	20	50	40	20	25	20
Standard deviation	14.23	15.00	13.67	-	16.47	14.19	9.81	15.83	17.15	18.11	15.98	9.91	15.13	12.79	15.97	13.06	15.52	8.06

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 51**

**B10B. By what percentage would the price you pay for (ISDN2/2e/ ISDN30) have to increase (assuming the prices of other communication services do not increase) for you to definitely switch away from (ISDN2/2e/ ISDN30)? (SINGLE CODE)**

Base : Those who would not be likely to switch from their main ISDN service if the price of their total bill increased by 10%

	SWITCHING ISDN SUPPLIER				CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
	Total	NEVER			YES	NO	YES	NO/DK	UP TO		YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
		LAST YEAR	EVER	/DK					3 YEARS	4+ YEARS									
Significance Level: 95%		*a	*b	*c	*d	*e	*f	*g	*h	*i	*j	*k	*l	*m	*n	*o	*p	*q	*r
Unweighted total	38	2	7	29	6	26	13	9	19	14	14	8	4	11	5	7	9	8	8
Effective Weighted Sample	26	2	6	19	5	18	8	6	13	10	9	4	4	10	5	7	8	7	8
Total	38	2	5	30	4	29	11	12	17	14	16	7	3	11	4	6	8	6	8
		6%	14%	80%	12%	78%	30%	32%	46%	38%	42%	20%	8%	29%	12%	16%	21%	16%	22%
1%-10%	3	-	-	3	-	3	3	-	-	-	3	-	-	-	-	-	-	-	-
	8%	-%	-%	10%	-%	11%	27%	-%	-%	-%	20%	-%	-%	-%	-%	-%	-%	-%	-%
		-%	-%	100%	-%	100%	100%	-%	-%	-%	100%	-%	-%	-%	-%	-%	-%	-%	-%
11%-20%	12	1	-	11	1	10	3	2	6	5	5	1	1	5	3	4	3	1	6
	33%	64%	-	36%	27%	35%	30%	20%	36%	33%	31%	11%	33%	46%	59%	58%	37%	13%	71%
		11%	-	89%	10%	84%	27%	19%	51%	39%	40%	6%	8%	40%	21%	29%	24%	6%	47%
21%-30%	6	-	1	5	*	6	2	3	2	4	5	*	*	-	-	-	*	*	-
	16%	-%	16%	17%	9%	19%	22%	26%	12%	27%	32%	6%	14%	-%	-%	-%	5%	7%	-%
		-%	14%	86%	7%	93%	41%	52%	35%	65%	86%	7%	7%	-%	-%	-%	7%	7%	-%
31%-40%	1	-	-	1	-	1	-	1	1	-	1	-	-	-	-	-	-	-	-
	3%	-%	-%	4%	-%	4%	-%	9%	6%	-%	7%	-%	-%	-%	-%	-%	-%	-%	-%
		-%	-%	100%	-%	100%	-%	100%	100%	-%	100%	-%	-%	-%	-%	-%	-%	-%	-%
41%-50%	5	1	1	4	-	5	-	4	5	*	-	4	2	2	1	2	-	2	-
	14%	36%	15%	12%	-%	17%	-%	29%	27%	3%	-%	47%	53%	15%	18%	26%	-%	26%	-%
		15%	15%	69%	-%	100%	-%	69%	92%	8%	-%	69%	31%	31%	15%	31%	-%	31%	-%
51%-60%	1	-	1	-	1	-	-	-	1	-	-	-	-	1	1	1	-	1	-
	3%	-%	19%	-%	22%	-%	-%	-%	6%	-%	-%	-%	-%	9%	23%	16%	-%	17%	-%
		-%	100%	-%	100%	-%	-%	-%	100%	-%	-%	-%	-%	100%	100%	100%	-%	100%	-%
Don't know	9	-	3	6	2	4	2	2	2	5	2	3	-	3	-	-	5	2	2
	24%	-%	50%	21%	41%	14%	21%	16%	13%	36%	10%	37%	-%	30%	-%	-%	58%	37%	29%
		-%	29%	71%	20%	46%	26%	22%	25%	58%	18%	31%	-%	36%	-%	-%	52%	25%	27%
Mean percentage	26.7	30.9	44.3	24.4	34.5	26.1	17.7	34.1	33.7	21.6	21.2	42.4	36.5	29.3	32.6	33.5	15.7	42.1	17.4
Standard deviation	14.23	19.59	17.10	12.72	21.54	13.81	6.43	13.43	14.83	8.13	8.06	14.57	17.56	18.07	19.70	17.53	5.00	17.71	3.82
Standard error	2.74	13.85	8.55	2.78	10.77	2.94	2.03	5.48	3.71	2.87	2.33	7.28	8.78	6.39	8.81	6.62	2.50	7.92	1.56
Median percentage	20	20	50	20	25	20	20	25	25	20	20	50	50	20	20	20	15	50	20
Standard deviation	14.23	19.59	17.10	12.72	21.54	13.81	6.43	13.43	14.83	8.13	8.06	14.57	17.56	18.07	19.70	17.53	5.00	17.71	3.82
Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																			

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 52**

**B12A. How long do you envisage continuing to use ISDN2/2e services for? (SINGLE CODE)**

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											IP SWITCHED		IP NOT SWITCHED	ANY IP
	Total	1-49 *a	50-249 b	250+ c	UNDER				ISDN2 h	ISDN30 i	ISDN2 ONLY j	ISDN30 ONLY *k	BOTH ISDN l	IP NOT ISDN *m	ISDN2 & IP n	ISDN30 & IP o	ISDN & IP p	ISDN q	ISDN *r				
					£1M *d	£1M-£20M e	£21M-£100M f	OVER £100M g															
Significance Level: 95%																							
Unweighted total	141	23	32	86	19	39	43	37	141	61	80	-	61	-	67	43	67	53	12	67			
Effective Weighted Sample	98	19	31	79	13	28	37	32	98	60	49	-	60	-	55	42	55	44	10	55			
Total	139	46	40	53	29	43	35	28	139	52	87	-	52	-	57	37	57	47	9	57			
		33%	29%	38%	21%	31%	25%	20%	100%	37%	63%	-%	37%	-%	41%	27%	41%	33%	7%	41%			
Less than six months	17	6	2	8	1	5	4	4	17	8	8	-	8	-	5	5	5	5	-	5			
	12%	13%	6%	15%	4%	10%	11%	14%	12%	16%	10%	-%	16%	-%	9%	13%	9%	12%	-%	9%			
		38%	15%	48%	7%	27%	23%	24%	100%	49%	51%	-%	49%	-%	32%	30%	32%	32%	-%	32%			
Six months to a year	38	13	11	14	10	9	8	11	38	14	24	-	14	-	21	11	21	18	3	21			
	27%	27%	27%	27%	34%	21%	22%	40%	27%	27%	27%	-%	27%	-%	36%	29%	36%	39%	28%	36%			
		33%	29%	38%	26%	24%	20%	29%	100%	38%	62%	-%	38%	-%	55%	28%	55%	48%	7%	55%			
A year to three years	45	12	16	17	5	21	16	3	45	16	28	-	16	-	15	10	15	13	2	15			
	32%	26%	40%	32%	16%	47%	45%	10%	32%	32%	32%	-%	32%	-%	26%	27%	26%	28%	22%	26%			
		26%	36%	38%	10%	46%	35%	6%	100%	37%	63%	-%	37%	-%	34%	22%	34%	29%	5%	34%			
Four to five years	18	5	7	6	7	3	5	2	18	8	11	-	8	-	8	6	8	6	2	8			
	13%	11%	18%	12%	25%	8%	16%	9%	13%	15%	12%	-%	15%	-%	14%	15%	14%	13%	19%	14%			
		27%	40%	33%	39%	18%	30%	13%	100%	41%	59%	-%	41%	-%	43%	30%	43%	33%	10%	43%			
Six to ten years	9	3	1	4	3	-	1	5	9	3	5	-	3	-	5	3	5	3	2	5			
	6%	7%	3%	8%	11%	-%	2%	17%	6%	6%	6%	-%	6%	-%	9%	9%	9%	7%	23%	9%			
		37%	16%	47%	37%	-%	9%	54%	100%	37%	63%	-%	37%	-%	63%	37%	63%	38%	26%	63%			
More than ten years	2	-	-	2	-	-	1	1	2	2	*	-	2	-	2	2	2	1	1	2			
	1%	-%	-%	4%	-%	-%	3%	3%	1%	3%	*%	-%	3%	-%	3%	4%	3%	2%	8%	3%			
		-%	-%	100%	-%	-%	60%	40%	100%	79%	21%	-%	79%	-%	79%	79%	79%	40%	40%	79%			
Don't know	11	8	2	1	3	6	*	2	11	1	10	-	1	-	1	1	1	-	-	1			
	8%	16%	6%	2%	11%	14%	1%	7%	8%	2%	12%	-%	2%	-%	3%	3%	3%	-%	-%	3%			
		68%	21%	11%	28%	53%	4%	16%	100%	9%	91%	-%	9%	-%	13%	9%	13%	-%	-%	13%			
Columns Tested:	a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																						

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 52

## B12A. How long do you envisage continuing to use ISDN2/2e services for? (SINGLE CODE)

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN30			ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		ISDN2	*b	IP														
Significance Level: 95%		a	*b	*c	d	e	f	*g	h	*i	j	k	l	*m	n	o	p	q
Unweighted total	141	123	18	-	88	53	33	28	42	25	105	36	94	11	58	83	43	94
Effective Weighted Sample	98	83	18	-	60	37	32	28	34	21	77	22	72	7	42	56	27	81
Total	139	124	16	-	82	57	28	24	38	20	103	37	88	15	62	77	57	80
		89%	11%	-%	59%	41%	20%	17%	27%	14%	74%	26%	63%	11%	45%	55%	41%	57%
Less than six months	17	16	1	-	11	6	6	2	4	1	15	2	11	4	9	8	6	10
	12%	13%	5%	-%	13%	11%	21%	10%	11%	6%	14%	5%	12%	27%	14%	10%	11%	13%
		95%	5%	-%	63%	37%	35%	14%	25%	7%	88%	12%	64%	24%	53%	47%	38%	62%
Six months to a year	38	32	6	-	23	15	8	7	14	7	34	4	34	-	24	13	15	22
	27%	26%	38%	-%	27%	27%	27%	27%	36%	35%	33%	10%	39%	-%	39%	17%	27%	28%
		84%	16%	-%	60%	40%	20%	17%	36%	19%	90%	10%	90%	-%	65%	35%	41%	59%
A year to three years	45	39	5	-	27	17	9	8	9	7	35	10	26	9	19	25	14	29
	32%	32%	33%	-%	33%	30%	31%	32%	23%	33%	34%	26%	29%	64%	31%	33%	24%	36%
		88%	12%	-%	61%	39%	19%	18%	19%	15%	78%	22%	58%	21%	43%	57%	31%	64%
Four to five years	18	16	2	-	13	5	4	4	5	3	8	10	8	-	6	12	9	9
	13%	13%	12%	-%	16%	9%	13%	16%	13%	15%	8%	27%	10%	-%	10%	16%	16%	12%
		90%	10%	-%	71%	29%	20%	22%	26%	17%	46%	54%	46%	-%	33%	67%	48%	52%
Six to ten years	9	9	-	-	5	4	2	2	3	2	5	3	5	-	-	9	3	5
	6%	7%	-%	-%	6%	7%	6%	7%	9%	10%	5%	9%	6%	-%	-%	11%	5%	7%
		100%	-%	-%	54%	46%	19%	19%	40%	23%	63%	37%	63%	-%	-%	100%	37%	63%
More than ten years	2	1	1	-	1	1	1	1	2	-	2	*	2	-	-	2	-	2
	1%	1%	5%	-%	1%	2%	3%	3%	4%	-%	2%	1%	2%	-%	-%	3%	-%	3%
		60%	40%	-%	40%	60%	40%	40%	79%	-%	79%	21%	79%	-%	-%	100%	-%	100%
Don't know	11	10	1	-	4	8	-	1	1	-	4	8	2	1	4	8	9	1
	8%	8%	7%	-%	4%	14%	-%	4%	4%	-%	4%	21%	3%	10%	6%	10%	17%	2%
		91%	9%	-%	31%	69%	-%	9%	13%	-%	32%	68%	20%	12%	31%	69%	84%	12%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 52

## B12A. How long do you envisage continuing to use ISDN2/2e services for? (SINGLE CODE)

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
	Total	LAST YEAR	NEVER		YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
			EVER	/DK															
Significance Level: 95%		*a	b	c	d	e	f	*g	h	i	j	*k	l	m	n	*o	p	q	*r
Unweighted total	141	27	81	33	93	33	55	19	104	30	63	11	37	45	37	22	44	50	17
Effective Weighted Sample	98	19	63	19	67	20	35	13	74	21	42	6	29	41	33	16	39	41	14
Total	139	27	76	37	91	33	56	25	103	26	69	13	33	36	30	21	36	43	14
		19%	54%	26%	65%	23%	41%	18%	74%	19%	50%	9%	24%	26%	21%	15%	26%	31%	10%
Less than six months	17	9	8	-	16	1	10	1	17	-	11	-	3	5	5	*	5	3	2
	12%	33%	10%	-%	17%	2%	18%	3%	16%	-%	16%	-%	10%	13%	18%	2%	14%	8%	14%
		54%	46%	-%	95%	5%	63%	5%	100%	-%	68%	-%	20%	28%	32%	3%	30%	20%	12%
Six months to a year	38	10	25	3	32	3	16	1	38	-	16	1	14	12	13	10	10	18	3
	27%	37%	33%	8%	35%	9%	28%	6%	37%	-%	23%	7%	44%	32%	43%	51%	28%	42%	18%
			c		e				i										
		27%	65%	8%	85%	8%	42%	4%	100%	-%	43%	2%	38%	31%	34%	28%	27%	48%	7%
A year to three years	45	4	28	13	28	14	21	9	45	-	26	4	9	11	5	6	10	12	3
	32%	16%	36%	35%	31%	44%	36%	35%	43%	-%	38%	28%	28%	31%	18%	27%	26%	28%	21%
									i										
		10%	62%	28%	63%	32%	46%	20%	100%	-%	58%	8%	20%	25%	12%	13%	21%	27%	7%
Four to five years	18	2	11	5	10	6	4	6	4	14	7	3	3	4	3	3	5	5	3
	13%	9%	15%	13%	11%	17%	8%	24%	4%	55%	10%	26%	8%	11%	11%	12%	14%	11%	20%
									h										
		13%	61%	27%	54%	30%	24%	33%	22%	78%	40%	18%	15%	22%	18%	14%	28%	27%	16%
Six to ten years	9	1	2	5	3	5	-	3	-	9	3	-	2	4	1	2	4	4	1
	6%	4%	3%	14%	4%	16%	-%	12%	-%	33%	5%	-%	7%	11%	4%	8%	10%	9%	10%
						d				h									
		14%	23%	62%	38%	62%	-%	37%	-%	100%	37%	-%	28%	45%	14%	19%	45%	47%	16%
More than ten years	2	-	1	1	1	*	*	-	-	2	*	-	1	1	2	-	2	1	1
	1%	-%	2%	2%	1%	1%	1%	-%	-%	8%	1%	-%	2%	2%	5%	-%	4%	2%	6%
									h										
		-%	60%	40%	40%	21%	21%	-%	-%	100%	21%	-%	40%	40%	79%	-%	79%	40%	40%
Don't know	11	-	1	10	1	3	5	5	-	1	5	5	-	-	-	-	1	-	1
	8%	-%	2%	27%	1%	10%	9%	20%	-%	4%	7%	39%	-%	-%	-%	-%	3%	-%	10%
			b																
		-%	12%	88%	7%	28%	44%	44%	-%	9%	44%	44%	-%	-%	-%	-%	9%	-%	13%
Columns Tested:	a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																		

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 53**

**B12B. How long do you envisage continuing to use ISDN30 services for? (SINGLE CODE)**

Base : Those who use ISN30 (and mostly use an ISDN service)

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP ISDN	ISDN2 & IP	ISDN30 & IP	ISDN	ISDN	ANY IP	
					£1M	£1M-£20M	£21M-£100M	OVER £100M												
Significance Level: 95%		*a	b	c	*d	e	f	g	h	i	*j	k	l	*m	n	o	p	q	*r	s
Unweighted total	137	25	32	79	16	37	45	37	61	137	-	76	61	-	43	61	61	52	8	61
Effective Weighted Sample	133	25	32	79	16	36	44	36	60	133	-	74	60	-	42	60	60	51	8	60
Total	122	26	33	62	16	35	41	29	52	122	-	70	52	-	37	54	54	47	7	54
		22%	27%	51%	13%	29%	33%	24%	43%	100%	-%	57%	43%	-%	30%	45%	45%	38%	6%	45%
Less than six months	5	2	1	2	-	1	3	2	3	5	-	2	3	-	3	4	4	4	-	4
	4%	8%	3%	4%	-%	3%	7%	6%	7%	4%	-%	3%	7%	-%	9%	8%	8%	9%	-%	8%
		37%	19%	44%	-%	18%	52%	29%	63%	100%	-%	37%	63%	-%	63%	82%	82%	82%	-%	82%
Six months to a year	27	6	4	17	3	8	8	8	13	27	-	14	13	-	9	11	11	10	1	11
	22%	24%	13%	27%	18%	23%	20%	28%	26%	22%	-%	20%	26%	-%	24%	20%	20%	21%	12%	20%
		23%	15%	61%	11%	30%	30%	29%	50%	100%	-%	50%	50%	-%	32%	40%	40%	37%	3%	40%
A year to three years	45	9	19	17	4	16	18	6	13	45	-	32	13	-	8	18	18	17	2	18
	37%	36%	56%	28%	25%	47%	45%	20%	25%	37%	-%	46%	25%	-%	20%	34%	34%	35%	26%	34%
			c			g	g			n		hln								
		21%	41%	38%	9%	36%	41%	13%	29%	100%	-%	71%	29%	-%	17%	40%	40%	36%	4%	40%
Four to five years	24	4	7	13	5	6	7	6	13	24	-	12	13	-	10	13	13	10	2	13
	20%	16%	22%	20%	32%	18%	17%	19%	24%	20%	-%	17%	24%	-%	28%	24%	24%	22%	27%	24%
		18%	30%	52%	21%	27%	29%	23%	52%	100%	-%	48%	52%	-%	42%	54%	54%	42%	8%	54%
Six to ten years	13	2	2	9	3	1	3	5	7	13	-	6	7	-	5	5	5	4	1	5
	11%	8%	6%	14%	18%	3%	8%	17%	14%	11%	-%	8%	14%	-%	13%	9%	9%	8%	12%	9%
		16%	16%	68%	22%	9%	26%	37%	55%	100%	-%	45%	55%	-%	37%	37%	37%	31%	6%	37%
More than ten years	4	-	-	4	-	1	1	2	2	4	-	2	2	-	2	2	2	2	1	2
	3%	-%	-%	6%	-%	2%	2%	8%	5%	3%	-%	2%	5%	-%	6%	4%	4%	3%	12%	4%
		-%	-%	100%	-%	20%	20%	60%	60%	100%	-%	40%	60%	-%	60%	60%	60%	40%	20%	60%
Don't know	3	2	-	1	1	1	-	1	-	3	-	3	-	-	-	1	1	-	1	1
	2%	9%	-%	1%	7%	3%	-%	3%	-%	2%	-%	4%	-%	-%	-%	1%	1%	-%	12%	1%
		74%	-%	26%	37%	37%	-%	26%	-%	100%	-%	100%	-%	-%	-%	26%	26%	-%	26%	26%

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s



# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 53

## B12B. How long do you envisage continuing to use ISDN30 services for? (SINGLE CODE)

Base : Those who use ISN30 (and mostly use an ISDN service)

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN30			ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		ISDN2	IP															
Significance Level: 95%		a	b	*c	d	*e	f	g	h	*i	j	k	l	*m	n	o	p	q
Unweighted total	137	43	94	-	40	21	83	54	40	21	105	32	94	11	66	71	40	94
Effective Weighted Sample	133	42	91	-	40	21	80	53	39	21	103	30	92	11	64	70	38	93
Total	122	36	85	-	33	19	73	49	36	19	93	29	84	9	60	61	38	81
		30%	70%	-%	27%	15%	60%	40%	29%	15%	76%	24%	69%	8%	50%	50%	31%	66%
Less than six months	5	3	2	-	3	-	4	1	4	-	5	-	5	1	2	4	1	4
	4%	9%	2%	-%	10%	-%	6%	2%	12%	-%	6%	-%	5%	9%	3%	6%	3%	5%
		63%	37%	-%	63%	-%	82%	18%	82%	-%	100%	-%	85%	15%	33%	67%	18%	82%
Six months to a year	27	10	17	-	9	5	19	8	8	3	25	2	24	1	15	12	9	18
	22%	28%	20%	-%	27%	24%	26%	17%	21%	17%	k	6%	29%	9%	25%	19%	23%	23%
		38%	62%	-%	33%	17%	69%	31%	28%	12%	93%	7%	90%	3%	57%	43%	32%	68%
A year to three years	45	9	37	-	9	4	28	18	12	6	35	10	33	2	27	18	16	29
	37%	24%	43%	-%	27%	23%	38%	37%	34%	33%	38%	35%	39%	26%	45%	30%	41%	36%
		a																
		19%	81%	-%	20%	10%	61%	39%	27%	14%	78%	22%	72%	5%	59%	41%	34%	63%
Four to five years	24	6	18	-	6	7	12	12	7	6	13	11	10	3	10	14	11	13
	20%	17%	21%	-%	17%	36%	17%	24%	19%	33%	j	39%	12%	34%	17%	22%	28%	16%
		25%	75%	-%	24%	28%	51%	49%	28%	26%	53%	47%	40%	13%	43%	57%	44%	53%
Six to ten years	13	6	7	-	5	2	5	8	2	2	10	3	8	2	5	8	1	12
	11%	17%	8%	-%	14%	13%	6%	17%	7%	13%	11%	9%	10%	23%	8%	13%	3%	15%
		49%	51%	-%	37%	18%	37%	63%	18%	18%	80%	20%	63%	16%	37%	63%	9%	91%
More than ten years	4	2	2	-	2	1	2	2	2	-	3	1	3	-	-	4	-	4
	3%	4%	3%	-%	5%	4%	3%	3%	7%	-%	3%	3%	4%	-%	-%	n	6%	5%
		40%	60%	-%	40%	20%	60%	40%	60%	-%	80%	20%	80%	-%	-%	100%	-%	100%
Don't know	3	-	3	-	-	-	3	-	-	1	1	2	1	-	1	2	1	1
	2%	-%	4%	-%	-%	-%	4%	-%	-%	4%	1%	8%	1%	-%	2%	3%	3%	1%
		-%	100%	-%	-%	-%	100%	-%	-%	26%	26%	j	74%	-%	37%	63%	37%	26%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

**Table 53**

## **B12B. How long do you envisage continuing to use ISDN30 services for? (SINGLE CODE)**

Base : Those who use ISN30 (and mostly use an ISDN service)

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
								UP TO							UP TO				
	Total	LAST YEAR	EVER	NEVER	YES	NO	YES	NO/DK	3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%		*a	b	*c	d	*e	f	*g	h	i	j	*k	l	m	n	*o	p	q	*r
Unweighted total	137	26	83	28	95	29	59	17	102	32	64	12	34	47	31	25	36	48	13
Effective Weighted Sample	133	26	80	27	92	28	57	17	99	31	62	12	33	46	30	25	35	47	13
Total	122	22	74	25	83	26	51	16	91	28	56	11	30	42	27	23	31	43	12
		18%	61%	21%	68%	21%	42%	13%	74%	23%	46%	9%	25%	34%	22%	19%	26%	35%	10%
Less than six months	5	4	1	-	5	-	1	-	5	-	1	-	3	4	4	1	3	4	1
	4%	20%	1%	-%	6%	-%	2%	-%	6%	-%	2%	-%	9%	11%	13%	4%	11%	8%	7%
		82%	18%	-%	100%	-%	18%	-%	100%	-%	18%	-%	48%	82%	67%	18%	63%	67%	15%
Six months to a year	27	8	19	1	25	1	15	1	27	-	14	2	7	9	5	5	6	10	1
	22%	34%	25%	3%	30%	3%	30%	6%	30%	-%	26%	17%	24%	22%	17%	23%	18%	23%	7%
									i										
		28%	69%	3%	93%	3%	56%	4%	100%	-%	53%	7%	27%	33%	18%	19%	20%	37%	3%
A year to three years	45	3	34	8	29	10	20	7	45	-	24	3	11	14	8	10	8	14	5
	37%	12%	46%	33%	34%	38%	40%	40%	50%	-%	42%	31%	35%	35%	28%	45%	26%	32%	40%
									i										
		6%	76%	18%	63%	22%	45%	14%	100%	-%	52%	7%	23%	32%	17%	23%	18%	30%	10%
Four to five years	24	2	12	10	14	8	7	4	9	15	10	1	6	8	7	5	8	9	4
	20%	9%	16%	39%	17%	32%	14%	23%	10%	54%	18%	9%	19%	20%	27%	21%	26%	21%	33%
		8%	51%	41%	58%	35%	30%	16%	37%	h	42%	4%	23%	34%	30%	21%	34%	38%	16%
Six to ten years	13	4	7	2	8	5	6	2	3	10	7	2	2	3	2	2	3	4	1
	11%	19%	10%	6%	9%	20%	12%	12%	3%	35%	12%	15%	8%	8%	6%	7%	10%	9%	7%
									h										
		33%	55%	12%	60%	40%	48%	15%	25%	75%	51%	12%	18%	25%	12%	12%	25%	31%	6%
More than ten years	4	2	1	2	2	1	1	1	1	3	1	1	2	2	2	-	2	2	1
	3%	7%	1%	6%	3%	3%	2%	5%	1%	11%	1%	7%	5%	4%	9%	-%	8%	4%	7%
									h										
		40%	20%	40%	60%	20%	20%	20%	20%	80%	20%	20%	40%	40%	60%	-%	60%	40%	20%
Don't know	3	-	-	3	-	1	-	2	-	-	-	2	-	1	-	-	1	1	-
	2%	-%	-%	12%	-%	4%	-%	14%	-%	-%	-%	21%	-%	2%	-%	-%	3%	2%	-%
		-%	-%	100%	-%	37%	-%	74%	-%	-%	-%	74%	-%	26%	-%	-%	26%	26%	-%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 54**

## **B13A. What are you planning to use when you stop using your ISDN2/2e? (MULTI CODE)**

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP SWITCHED	IP NOT SWITCHED	ANY IP
					£1M	£1M-£20M	£21M-£100M	£100M										ISDN	ISDN	
Significance Level: 95%		*a	b	c	*d	e	f	g	h	i	j	*k	l	*m	n	o	p	q	*r	s
Unweighted total	141	23	32	86	19	39	43	37	141	61	80	-	61	-	67	43	67	53	12	67
Effective Weighted Sample	98	19	31	79	13	28	37	32	98	60	49	-	60	-	55	42	55	44	10	55
Total	139	46	40	53	29	43	35	28	139	52	87	-	52	-	57	37	57	47	9	57
		33%	29%	38%	21%	31%	25%	20%	100%	37%	63%	-%	37%	-%	41%	27%	41%	33%	7%	41%
Hosted VOIP	58	13	20	25	12	16	18	11	58	30	28	-	30	-	35	24	35	32	2	35
	42%	28%	50%	48%	42%	38%	52%	40%	42%	58%	32%	-%	58%	-%	61%	66%	61%	69%	21%	61%
										j	j		j		hj	hj	hj	hj		hj
		23%	34%	43%	21%	28%	31%	19%	100%	52%	48%	-%	52%	-%	60%	42%	60%	55%	3%	60%
IP Centrex	55	13	19	23	7	13	18	13	55	30	25	-	30	-	29	23	29	27	2	29
	39%	27%	47%	44%	24%	29%	52%	47%	39%	57%	29%	-%	57%	-%	51%	61%	51%	59%	21%	51%
										hj	hj		hj		j	hj	j	hj		j
		23%	35%	42%	13%	23%	33%	24%	100%	54%	46%	-%	54%	-%	53%	41%	53%	50%	4%	53%
ISDN30	45	12	15	18	6	12	13	12	45	23	21	-	23	-	23	19	23	19	5	23
	32%	26%	36%	34%	22%	27%	38%	45%	32%	45%	25%	-%	45%	-%	41%	51%	41%	40%	49%	41%
										j	j		j		hj	hj	hj			
		27%	33%	40%	14%	26%	30%	28%	100%	52%	48%	-%	52%	-%	52%	42%	52%	42%	10%	52%
SIP Trunking	38	5	11	21	3	5	14	12	38	23	14	-	23	-	23	18	23	23	-	23
	27%	11%	28%	40%	10%	12%	40%	45%	27%	45%	17%	-%	45%	-%	40%	48%	40%	49%	-%	40%
							e	e		hj	hj		hj		j	hj	j	hj		j
		14%	30%	56%	8%	14%	37%	33%	100%	62%	38%	-%	62%	-%	61%	47%	61%	61%	-%	61%
Leased lines / VPN	37	12	7	17	7	9	11	6	37	16	21	-	16	-	20	11	20	17	3	20
	26%	26%	18%	33%	23%	20%	33%	22%	26%	30%	24%	-%	30%	-%	35%	30%	35%	37%	28%	35%
		33%	20%	47%	18%	24%	31%	17%	100%	43%	57%	-%	43%	-%	54%	30%	54%	47%	7%	54%
Ethernet	32	1	12	19	3	8	10	12	32	17	15	-	17	-	20	15	20	16	3	20
	23%	2%	29%	37%	9%	18%	30%	42%	23%	33%	17%	-%	33%	-%	35%	41%	35%	35%	34%	35%
							e	e		j	j		j		j	hj	j	j		j
		3%	37%	60%	8%	24%	33%	36%	100%	54%	46%	-%	54%	-%	63%	47%	63%	50%	10%	63%
Non-IP Centrex	26	4	5	17	5	5	6	9	26	17	9	-	17	-	18	13	18	17	1	18
	19%	9%	13%	32%	17%	10%	18%	34%	19%	33%	10%	-%	33%	-%	31%	35%	31%	37%	8%	31%
				b			e	e		hj	hj		hj		j	hj	j	hj		j
		16%	20%	64%	19%	17%	25%	36%	100%	66%	34%	-%	66%	-%	68%	49%	68%	65%	3%	68%
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																				

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 54

## B13A. What are you planning to use when you stop using your ISDN2/2e? (MULTI CODE)

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											IP SWITCHED		IP NOT SWITCHED	ANY IP
	Total	1-49	50-249	250+	UNDER			ISDN2	ISDN30	ISDN30			IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	ISDN	ISDN					
					£1M	£1M-£20M	£21M-£100M			ONLY	ONLY	BOTH ISDN											
Significance Level: 95%		*a	b	c	*d	e	f	g	h	i	j	*k	l	*m	n	o	p	q	*r	s			
Unweighted total	141	23	32	86	19	39	43	37	141	61	80	-	61	-	67	43	67	53	12	67			
Effective Weighted Sample	98	19	31	79	13	28	37	32	98	60	49	-	60	-	55	42	55	44	10	55			
Total	139	46	40	53	29	43	35	28	139	52	87	-	52	-	57	37	57	47	9	57			
		33%	29%	38%	21%	31%	25%	20%	100%	37%	63%	-%	37%	-%	41%	27%	41%	33%	7%	41%			
Would not replace service	5	3	1	-	3	1	-	-	5	-	5	-	-	-	-	-	-	-	-	-			
	3%	7%	3%	-%	11%	3%	-%	-%	3%	-%	5%	-%	-%	-%	-%	-%	-%	-%	-%	-%			
		69%	31%	-%	69%	31%	-%	-%	100%	-%	100%	-%	-%	-%	-%	-%	-%	-%	-%	-%			
Not thought about it	14	6	4	4	5	5	3	2	14	1	13	-	1	-	2	-	2	-	2	2			
	10%	13%	10%	7%	16%	11%	8%	7%	10%	2%	15%	-%	2%	-%	3%	-%	3%	-%	19%	3%			
									oq		ilnopqs												
		43%	30%	27%	33%	35%	19%	13%	100%	6%	94%	-%	6%	-%	13%	-%	13%	-%	13%	13%			
Don't know	9	6	1	2	-	7	*	2	9	-	9	-	-	-	2	-	2	-	1	2			
	7%	13%	3%	3%	-%	15%	1%	8%	7%	-%	11%	-%	-%	-%	3%	-%	3%	-%	15%	3%			
						f					iloq												
		67%	15%	18%	-%	72%	4%	24%	100%	-%	100%	-%	-%	-%	19%	-%	19%	-%	15%	19%			

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 54

## B13A. What are you planning to use when you stop using your ISDN2/2e? (MULTI CODE)

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	*b	*c	d	e	f	*g	h	*i	j	k	l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	141	123	18	-	88	53	33	28	42	25	105	36	94	11	58	83	43	94
Effective Weighted Sample	98	83	18	-	60	37	32	28	34	21	77	22	72	7	42	56	27	81
Total	139	124	16	-	82	57	28	24	38	20	103	37	88	15	62	77	57	80
		89%	11%	-%	59%	41%	20%	17%	27%	14%	74%	26%	63%	11%	45%	55%	41%	57%
Hosted VOIP	58	48	11	-	39	19	18	12	25	11	46	12	40	6	28	31	20	39
	42%	39%	68%	-%	47%	34%	65%	50%	66%	54%	45%	33%	46%	42%	45%	40%	35%	49%
		82%	18%	-%	67%	33%	31%	21%	42%	18%	79%	21%	69%	10%	47%	53%	34%	66%
IP Centrex	55	48	7	-	34	20	15	15	19	10	49	6	45	4	26	28	14	39
	39%	39%	45%	-%	42%	36%	53%	61%	51%	51%	48%	16%	52%	25%	43%	37%	24%	49%
		87%	13%	-%	63%	37%	27%	27%	35%	18%	90%	10%	83%	7%	48%	52%	25%	71%
ISDN30	45	38	7	-	32	12	17	7	19	4	34	11	32	2	17	28	8	35
	32%	30%	45%	-%	39%	22%	60%	27%	51%	21%	33%	30%	36%	15%	27%	36%	14%	44%
		84%	16%	-%	72%	28%	37%	15%	43%	9%	76%	24%	71%	5%	37%	63%	18%	79%
SIP Trunking	38	34	4	-	28	10	13	10	14	9	35	2	35	1	19	18	8	29
	27%	27%	27%	-%	34%	18%	47%	43%	37%	46%	34%	7%	39%	5%	31%	24%	15%	37%
		89%	11%	-%	73%	27%	35%	27%	37%	24%	94%	6%	92%	2%	51%	49%	22%	78%
Leased lines / VPN	37	31	5	-	20	16	9	6	14	6	31	6	27	4	19	17	12	23
	26%	25%	33%	-%	25%	29%	34%	26%	37%	29%	30%	16%	31%	24%	31%	22%	21%	29%
		86%	14%	-%	55%	45%	26%	17%	38%	16%	84%	16%	74%	10%	53%	47%	33%	63%
Ethernet	32	27	5	-	18	15	10	8	14	7	25	7	24	*	15	17	7	25
	23%	22%	32%	-%	21%	26%	35%	32%	36%	33%	24%	20%	28%	3%	24%	22%	13%	31%
		85%	15%	-%	55%	45%	30%	24%	43%	21%	77%	23%	76%	1%	46%	54%	23%	77%
Non-IP Centrex	26	22	4	-	14	12	11	6	14	4	21	5	20	1	15	11	8	18
	19%	18%	25%	-%	18%	21%	41%	24%	37%	19%	21%	13%	23%	5%	25%	14%	15%	22%
		85%	15%	-%	55%	45%	44%	22%	54%	15%	81%	19%	78%	3%	59%	41%	32%	68%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 54

## B13A. What are you planning to use when you stop using your ISDN2/2e? (MULTI CODE)

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	*b	*c	d	e	f	*g	h	*i	j	k	l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	141	123	18	-	88	53	33	28	42	25	105	36	94	11	58	83	43	94
Effective Weighted Sample	98	83	18	-	60	37	32	28	34	21	77	22	72	7	42	56	27	81
Total	139	124	16	-	82	57	28	24	38	20	103	37	88	15	62	77	57	80
		89%	11%	-%	59%	41%	20%	17%	27%	14%	74%	26%	63%	11%	45%	55%	41%	57%
Would not replace service	5	5	-	-	-	5	-	-	-	-	1	3	1	-	5	-	3	1
	3%	4%	-%	-%	-%	8%	-%	-%	-%	-%	1%	9%	2%	-%	7%	-%	5%	2%
		100%	-%	-%	-%	100%	-%	-%	-%	-%	31%	69%	31%	-%	100%	-%	69%	31%
Not thought about it	14	13	1	-	4	9	-	1	1	*	8	6	6	2	1	13	10	3
	10%	11%	5%	-%	5%	16%	-%	3%	4%	2%	8%	16%	7%	12%	2%	16%	18%	4%
		94%	6%	-%	32%	68%	-%	6%	10%	3%	58%	42%	45%	13%	9%	91%	72%	25%
Don't know	9	9	-	-	9	*	-	-	2	-	5	4	2	3	-	9	7	2
	7%	8%	-%	-%	11%	1%	-%	-%	5%	-%	5%	11%	3%	21%	-%	12%	12%	2%
		100%	-%	-%	96%	4%	-%	-%	19%	-%	57%	43%	24%	34%	-%	100%	76%	19%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 54

## B13A. What are you planning to use when you stop using your ISDN2/2e? (MULTI CODE)

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%		*a	b	c	d	e	f	*g	h	i	j	*k	l	m	n	*o	p	q	*r
Unweighted total	141	27	81	33	93	33	55	19	104	30	63	11	37	45	37	22	44	50	17
Effective Weighted Sample	98	19	63	19	67	20	35	13	74	21	42	6	29	41	33	16	39	41	14
Total	139	27	76	37	91	33	56	25	103	26	69	13	33	36	30	21	36	43	14
		19%	54%	26%	65%	23%	41%	18%	74%	19%	50%	9%	24%	26%	21%	15%	26%	31%	10%
Hosted VOIP	58	12	41	6	48	7	18	5	48	11	23	-	24	22	18	15	20	29	7
	42%	43%	54%	17%	53%	21%	32%	19%	46%	41%	33%	-%	73%	62%	60%	72%	56%	66%	48%
			c		e														
		20%	70%	11%	83%	12%	31%	8%	82%	18%	40%	-%	41%	38%	31%	26%	35%	49%	11%
IP Centrex	55	20	31	5	46	5	23	2	48	7	24	1	18	21	20	10	20	24	5
	39%	73%	40%	13%	50%	15%	41%	10%	46%	28%	35%	8%	54%	59%	67%	46%	54%	55%	37%
			c		e														
		36%	56%	8%	83%	9%	42%	4%	87%	13%	45%	2%	32%	39%	36%	17%	36%	44%	9%
ISDN30	45	12	20	13	31	7	16	6	38	7	20	2	17	16	15	6	17	18	5
	32%	44%	27%	35%	34%	23%	28%	22%	37%	25%	28%	14%	52%	45%	49%	29%	48%	41%	38%
		26%	45%	28%	69%	17%	35%	13%	85%	15%	44%	4%	38%	36%	33%	13%	39%	40%	12%
SIP Trunking	38	15	23	*	34	2	15	-	31	7	15	-	17	18	17	8	15	19	4
	27%	55%	30%	1%	38%	7%	26%	-%	30%	28%	21%	-%	51%	51%	57%	37%	42%	45%	25%
			c		e														
		39%	60%	1%	90%	6%	39%	-%	81%	19%	39%	-%	45%	49%	45%	20%	41%	52%	9%
Leased lines / VPN	37	9	22	6	29	5	13	3	35	2	17	-	17	13	11	10	10	17	2
	26%	32%	29%	17%	32%	17%	24%	13%	34%	8%	24%	-%	51%	36%	37%	47%	28%	40%	17%
									i										
		23%	60%	17%	80%	15%	37%	9%	94%	6%	46%	-%	46%	36%	30%	27%	27%	47%	7%
Ethernet	32	7	21	5	24	5	9	3	23	9	11	*	14	14	13	7	14	16	4
	23%	26%	27%	13%	27%	15%	16%	11%	22%	36%	17%	3%	43%	38%	42%	31%	38%	37%	31%
		21%	64%	14%	76%	16%	28%	9%	71%	29%	36%	1%	44%	42%	39%	20%	43%	49%	14%
Non-IP Centrex	26	8	16	2	24	2	8	-	22	4	8	-	14	12	11	7	11	18	-
	19%	31%	22%	4%	26%	6%	15%	-%	22%	15%	12%	-%	44%	35%	38%	31%	31%	41%	-%
		31%	62%	6%	91%	8%	32%	-%	86%	14%	32%	-%	55%	48%	43%	25%	43%	68%	-%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 54

## B13A. What are you planning to use when you stop using your ISDN2/2e? (MULTI CODE)

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
								UP TO							UP TO				
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%		*a	b	c	d	e	f	*g	h	i	j	*k	l	m	n	*o	p	q	*r
Unweighted total	141	27	81	33	93	33	55	19	104	30	63	11	37	45	37	22	44	50	17
Effective Weighted Sample	98	19	63	19	67	20	35	13	74	21	42	6	29	41	33	16	39	41	14
Total	139	27	76	37	91	33	56	25	103	26	69	13	33	36	30	21	36	43	14
		19%	54%	26%	65%	23%	41%	18%	74%	19%	50%	9%	24%	26%	21%	15%	26%	31%	10%
Would not replace service	5	-	1	3	1	-	1	3	1	-	1	3	-	-	-	-	-	-	-
	3%	-%	2%	9%	2%	-%	2%	12%	1%	-%	2%	25%	-%	-%	-%	-%	-%	-%	-%
		-%	31%	69%	31%	-%	31%	69%	31%	-%	31%	69%	-%	-%	-%	-%	-%	-%	-%
Not thought about it	14	1	4	8	3	7	5	7	6	5	9	3	-	2	-	-	2	-	2
	10%	5%	6%	22%	4%	22%	9%	27%	5%	19%	14%	21%	-%	5%	-%	-%	5%	-%	13%
		10%	32%	58%	25%	52%	38%	49%	41%	36%	68%	19%	-%	13%	-%	-%	13%	-%	13%
Don't know	9	-	-	9	*	8	4	4	4	2	4	4	-	1	-	-	1	-	2
	7%	-%	-%	25%	*%	26%	6%	16%	3%	7%	5%	31%	-%	4%	-%	-%	4%	-%	13%
		-%	-%	100%	4%	91%	38%	43%	38%	19%	38%	43%	-%	15%	-%	-%	15%	-%	19%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r



# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 55**

## **B13B. What are you planning to use when you stop using your ISDN30? (MULTI CODE)**

Base : Those who use ISN30 (and mostly use an ISDN service)

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											
	Total	1-49	50-249	250+	UNDER £1M	£1M-£20M	£21M-£100M	OVER £100M	ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP SWITCHED ISDN	IP NOT SWITCHED ISDN	ANY IP
Significance Level: 95%		*a	b	c	*d	e	f	g	h	i	*j	k	l	*m	n	o	p	q	*r	s
Unweighted total	137	25	32	79	16	37	45	37	61	137	-	76	61	-	43	61	61	52	8	61
Effective Weighted Sample	133	25	32	79	16	36	44	36	60	133	-	74	60	-	42	60	60	51	8	60
Total	122	26	33	62	16	35	41	29	52	122	-	70	52	-	37	54	54	47	7	54
		22%	27%	51%	13%	29%	33%	24%	43%	100%	-%	57%	43%	-%	30%	45%	45%	38%	6%	45%
IP Centrex	34	7	11	15	3	8	16	6	18	34	-	16	18	-	13	20	20	19	2	20
	28%	28%	34%	24%	20%	22%	39%	22%	34%	28%	-%	23%	34%	-%	35%	37%	37%	40%	23%	37%
		22%	34%	45%	9%	23%	47%	19%	53%	100%	-%	47%	53%	-%	38%	60%	60%	55%	5%	60%
Hosted VOIP	33	3	11	19	2	6	14	11	19	33	-	15	19	-	15	23	23	20	3	23
	27%	12%	34%	30%	12%	17%	34%	39%	36%	27%	-%	21%	36%	-%	40%	42%	42%	44%	38%	42%
		9%	34%	57%	6%	18%	41%	33%	56%	100%	-%	44%	56%	-%	44%	69%	69%	61%	8%	69%
SIP Trunking	31	4	10	17	-	9	14	7	18	31	-	14	18	-	15	21	21	19	3	21
	26%	16%	31%	27%	-%	25%	35%	25%	34%	26%	-%	20%	34%	-%	41%	39%	39%	40%	38%	39%
		14%	33%	53%	-%	29%	46%	23%	56%	100%	-%	44%	56%	-%	49%	68%	68%	60%	8%	68%
ISDN2/2e	30	5	11	13	5	4	15	6	17	30	-	13	17	-	12	20	20	19	1	20
	25%	20%	34%	22%	33%	11%	36%	22%	33%	25%	-%	18%	33%	-%	33%	36%	36%	40%	15%	36%
		18%	38%	45%	18%	13%	48%	21%	57%	100%	-%	43%	57%	-%	41%	65%	65%	62%	3%	65%
Leased lines / VPN	19	4	5	9	2	2	9	6	10	19	-	9	10	-	5	9	9	8	1	9
	15%	16%	16%	15%	13%	6%	22%	19%	18%	15%	-%	13%	18%	-%	14%	17%	17%	18%	12%	17%
		22%	27%	50%	11%	11%	48%	29%	51%	100%	-%	49%	51%	-%	28%	49%	49%	44%	4%	49%
Ethernet	17	4	3	9	2	3	8	4	10	17	-	7	10	-	7	11	11	8	2	11
	14%	16%	9%	15%	13%	8%	19%	14%	19%	14%	-%	10%	19%	-%	18%	20%	20%	18%	35%	20%
		25%	18%	56%	13%	17%	47%	23%	60%	100%	-%	40%	60%	-%	40%	64%	64%	50%	14%	64%
Non-IP Centrex	14	4	2	8	3	3	5	3	8	14	-	6	8	-	5	7	7	7	-	7
	12%	17%	6%	13%	20%	8%	12%	11%	15%	12%	-%	9%	15%	-%	12%	12%	12%	14%	-%	12%
		30%	14%	55%	23%	21%	35%	22%	55%	100%	-%	45%	55%	-%	32%	47%	47%	47%	-%	47%
Other NON-IP service	3	1	1	1	1	1	-	1	1	3	-	2	1	-	1	1	1	-	1	1
	2%	4%	3%	1%	7%	3%	-%	3%	2%	2%	-%	3%	2%	-%	2%	1%	1%	-%	12%	1%
		35%	37%	28%	37%	35%	-%	28%	28%	100%	-%	72%	28%	-%	28%	28%	28%	-%	28%	28%

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 55**

**B13B. What are you planning to use when you stop using your ISDN30? (MULTI CODE)**

Base : Those who use ISN30 (and mostly use an ISDN service)

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											ANY IP
	Total	1-49	50-249	250+	UNDER £1M	£1M- £20M	£21M-£10 0M	OVER £100M	ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP SWITCHED ISDN	IP NOT SWITCHED ISDN	
Significance Level: 95%		*a	b	c	*d	e	f	g	h	i	*j	k	l	*m	n	o	p	q	*r	s
Unweighted total	137	25	32	79	16	37	45	37	61	137	-	76	61	-	43	61	61	52	8	61
Effective Weighted Sample	133	25	32	79	16	36	44	36	60	133	-	74	60	-	42	60	60	51	8	60
Total	122	26	33	62	16	35	41	29	52	122	-	70	52	-	37	54	54	47	7	54
		22%	27%	51%	13%	29%	33%	24%	43%	100%	-%	57%	43%	-%	30%	45%	45%	38%	6%	45%
Would not replace service	25	4	6	15	5	11	5	4	6	25	-	20	6	-	2	7	7	5	2	7
	21%	16%	19%	24%	30%	31%	13%	14%	11%	21%	-%	28%	11%	-%	6%	13%	13%	11%	27%	13%
		17%	24%	59%	19%	42%	21%	16%	23%	100%	-%	77%	23%	-%	9%	28%	28%	21%	7%	28%
Not thought about it	12	2	4	6	1	3	4	3	6	12	-	5	6	-	4	5	5	4	-	5
	10%	8%	13%	9%	5%	9%	11%	12%	12%	10%	-%	8%	12%	-%	12%	10%	10%	9%	-%	10%
		17%	35%	47%	7%	26%	38%	29%	54%	100%	-%	46%	54%	-%	38%	47%	47%	38%	-%	47%
Don't know	13	5	2	6	2	4	4	3	2	13	-	11	2	-	2	3	3	3	1	3
	11%	21%	6%	9%	14%	11%	9%	11%	3%	11%	-%	17%	3%	-%	4%	6%	6%	6%	12%	6%
		42%	16%	42%	17%	29%	29%	24%	12%	100%	-%	88%	12%	-%	12%	26%	26%	20%	6%	26%

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 55

## B13B. What are you planning to use when you stop using your ISDN30? (MULTI CODE)

Base : Those who use ISN30 (and mostly use an ISDN service)

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN30			ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		ISDN2	IP															
Significance Level: 95%		a	b	*c	d	*e	f	g	h	*i	j	k	l	*m	n	o	p	q
Unweighted total	137	43	94	-	40	21	83	54	40	21	105	32	94	11	66	71	40	94
Effective Weighted Sample	133	42	91	-	40	21	80	53	39	21	103	30	92	11	64	70	38	93
Total	122	36	85	-	33	19	73	49	36	19	93	29	84	9	60	61	38	81
		30%	70%	-%	27%	15%	60%	40%	29%	15%	76%	24%	69%	8%	50%	50%	31%	66%
IP Centrex	34	12	22	-	10	7	22	11	15	5	30	4	27	3	16	17	5	28
	28%	32%	26%	-%	32%	38%	31%	23%	41%	29%	32%	12%	32%	32%	27%	28%	14%	35%
		35%	65%	-%	31%	22%	67%	33%	44%	16%	k	11%	81%	9%	48%	52%	16%	p
Hosted VOIP	33	13	20	-	13	6	24	9	17	5	32	2	31	1	16	17	5	27
	27%	37%	24%	-%	38%	32%	33%	19%	49%	29%	34%	5%	37%	9%	27%	28%	14%	34%
		40%	60%	-%	38%	18%	72%	28%	52%	16%	g	5%	93%	2%	48%	52%	15%	p
SIP Trunking	31	14	17	-	13	5	19	12	13	8	27	4	24	2	12	19	6	24
	26%	39%	20%	-%	38%	26%	26%	25%	37%	43%	29%	15%	29%	26%	20%	31%	16%	30%
		b																
		45%	55%	-%	40%	16%	61%	39%	43%	26%	86%	14%	78%	8%	40%	60%	19%	78%
ISDN2/2e	30	12	18	-	12	6	17	13	13	6	25	5	25	1	16	14	7	23
	25%	33%	21%	-%	35%	29%	24%	26%	37%	35%	27%	16%	29%	9%	26%	23%	19%	28%
		40%	60%	-%	39%	18%	58%	42%	44%	21%	84%	16%	82%	3%	53%	47%	24%	76%
Leased lines / VPN	19	7	12	-	7	3	16	3	8	1	17	2	16	1	10	9	3	15
	15%	19%	14%	-%	21%	14%	22%	5%	23%	4%	19%	5%	20%	9%	17%	14%	8%	18%
					g		g		g									
		37%	63%	-%	37%	14%	86%	14%	44%	4%	92%	8%	87%	4%	54%	46%	17%	79%
Ethernet	17	6	11	-	8	3	11	6	7	4	13	3	13	1	9	8	5	12
	14%	16%	13%	-%	23%	14%	15%	11%	18%	22%	14%	12%	15%	9%	15%	12%	13%	15%
		34%	66%	-%	45%	15%	67%	33%	39%	25%	79%	21%	75%	5%	55%	45%	30%	70%
Non-IP Centrex	14	6	9	-	4	4	9	5	6	1	13	2	12	1	7	7	4	9
	12%	15%	10%	-%	13%	20%	12%	11%	16%	6%	14%	5%	14%	9%	12%	11%	12%	11%
		39%	61%	-%	29%	26%	63%	37%	39%	7%	89%	11%	83%	6%	52%	48%	31%	64%
Other NON-IP service	3	-	3	-	1	-	1	2	-	1	-	3	-	-	1	2	2	1
	2%	-%	3%	-%	2%	-%	1%	4%	-%	4%	-%	10%	-%	-%	2%	3%	5%	1%
											j							
		-%	100%	-%	28%	-%	28%	72%	-%	28%	-%	100%	-%	-%	37%	63%	72%	28%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 55**

**B13B. What are you planning to use when you stop using your ISDN30? (MULTI CODE)**

Base : Those who use ISN30 (and mostly use an ISDN service)

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN30			ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		ISDN2	ISDN30	IP														
Significance Level: 95%		a	b	*c	d	*e	f	g	h	*i	j	k	l	*m	n	o	p	q
Unweighted total	137	43	94	-	40	21	83	54	40	21	105	32	94	11	66	71	40	94
Effective Weighted Sample	133	42	91	-	40	21	80	53	39	21	103	30	92	11	64	70	38	93
Total	122	36	85	-	33	19	73	49	36	19	93	29	84	9	60	61	38	81
		30%	70%	-%	27%	15%	60%	40%	29%	15%	76%	24%	69%	8%	50%	50%	31%	66%
Would not replace service	25	4	21	-	2	3	17	9	4	3	16	9	14	2	13	12	9	15
	21%	12%	25%	-%	7%	19%	23%	18%	12%	15%	18%	32%	17%	26%	22%	20%	25%	19%
		17%	83%	-%	9%	14%	d	35%	16%	11%	64%	36%	55%	9%	51%	49%	37%	59%
Not thought about it	12	4	8	-	3	3	3	9	5	1	6	5	6	-	4	7	5	6
	10%	10%	9%	-%	10%	15%	4%	18%	13%	4%	7%	19%	7%	-%	7%	12%	14%	8%
		31%	69%	-%	29%	25%	24%	f	40%	7%	53%	47%	53%	-%	38%	62%	47%	53%
Don't know	13	1	12	-	2	-	10	3	2	2	9	4	7	2	6	7	7	5
	11%	2%	14%	-%	5%	-%	14%	6%	4%	10%	10%	14%	9%	17%	10%	11%	18%	6%
		6%	a	-%	12%	-%	77%	23%	12%	14%	68%	32%	56%	12%	47%	53%	51%	40%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 55**

**B13B. What are you planning to use when you stop using your ISDN30? (MULTI CODE)**

Base : Those who use ISN30 (and mostly use an ISDN service)

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%		*a	b	*c	d	*e	f	*g	h	i	j	*k	l	m	n	*o	p	q	*r
Unweighted total	137	26	83	28	95	29	59	17	102	32	64	12	34	47	31	25	36	48	13
Effective Weighted Sample	133	26	80	27	92	28	57	17	99	31	62	12	33	46	30	25	35	47	13
Total	122	22	74	25	83	26	51	16	91	28	56	11	30	42	27	23	31	43	12
		18%	61%	21%	68%	21%	42%	13%	74%	23%	46%	9%	25%	34%	22%	19%	26%	35%	10%
IP Centrex	34	7	24	4	28	4	11	3	27	6	12	2	12	19	10	7	13	17	3
	28%	29%	32%	14%	34%	17%	21%	18%	30%	22%	21%	17%	42%	44%	36%	32%	41%	41%	22%
		19%	70%	11%	84%	13%	32%	9%	81%	19%	35%	5%	37%	55%	29%	22%	38%	52%	8%
Hosted VOIP	33	8	21	4	27	5	9	2	27	6	10	1	16	17	9	11	11	19	4
	27%	38%	28%	17%	33%	20%	17%	11%	30%	22%	17%	7%	54%	42%	32%	49%	37%	45%	33%
		25%	62%	13%	81%	16%	26%	5%	81%	19%	29%	2%	49%	52%	26%	34%	34%	57%	12%
SIP Trunking	31	6	21	4	26	4	8	2	26	6	9	1	13	18	10	9	12	18	4
	26%	27%	28%	17%	31%	16%	16%	11%	28%	20%	16%	7%	44%	42%	36%	39%	39%	41%	31%
		19%	67%	14%	83%	13%	26%	6%	82%	18%	29%	3%	42%	57%	31%	29%	39%	57%	12%
ISDN2/2e	30	7	21	2	28	2	9	2	24	6	10	-	14	18	8	7	12	18	2
	25%	31%	29%	8%	34%	8%	17%	11%	27%	22%	19%	-%	48%	44%	31%	31%	40%	41%	17%
		23%	70%	7%	93%	7%	29%	6%	80%	20%	35%	-%	48%	61%	28%	24%	42%	58%	7%
Leased lines / VPN	19	3	13	2	16	2	9	1	16	2	9	1	5	8	4	2	7	8	1
	15%	15%	18%	9%	20%	6%	17%	5%	17%	8%	16%	7%	18%	20%	16%	9%	22%	20%	7%
		18%	69%	13%	87%	8%	47%	4%	83%	13%	47%	4%	29%	43%	23%	11%	37%	44%	4%
Ethernet	17	2	13	2	14	2	5	1	14	2	5	1	5	9	3	6	5	10	1
	14%	7%	17%	9%	17%	6%	10%	5%	15%	8%	9%	7%	18%	21%	9%	25%	16%	23%	7%
		9%	77%	14%	86%	9%	32%	5%	81%	14%	32%	5%	32%	53%	15%	34%	30%	59%	5%
Non-IP Centrex	14	2	12	1	12	2	6	2	12	3	8	-	5	5	3	4	2	6	1
	12%	9%	16%	3%	15%	7%	12%	10%	13%	10%	14%	-%	15%	11%	13%	19%	8%	13%	9%
		13%	81%	6%	87%	13%	42%	11%	81%	19%	53%	-%	32%	32%	24%	30%	17%	39%	7%
Other NON-IP service	3	-	-	3	-	3	-	2	2	1	2	-	-	1	-	1	-	-	1
	2%	-%	-%	11%	-%	11%	-%	12%	2%	4%	4%	-%	-%	2%	-%	3%	-%	-%	7%
		-%	-%	100%	-%	100%	-%	72%	63%	37%	72%	-%	-%	28%	-%	28%	-%	-%	28%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 55

B13B. What are you planning to use when you stop using your ISDN30? (MULTI CODE)

Base : Those who use ISN30 (and mostly use an ISDN service)

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%		*a	b	*c	d	*e	f	*g	h	i	j	*k	l	m	n	*o	p	q	*r
Unweighted total	137	26	83	28	95	29	59	17	102	32	64	12	34	47	31	25	36	48	13
Effective Weighted Sample	133	26	80	27	92	28	57	17	99	31	62	12	33	46	30	25	35	47	13
Total	122	22	74	25	83	26	51	16	91	28	56	11	30	42	27	23	31	43	12
		18%	61%	21%	68%	21%	42%	13%	74%	23%	46%	9%	25%	34%	22%	19%	26%	35%	10%
Would not replace service	25	5	14	7	15	8	16	2	16	8	15	3	2	4	5	5	2	3	4
	21%	21%	19%	27%	18%	31%	32%	12%	18%	29%	26%	32%	5%	10%	20%	20%	8%	6%	38%
		19%	54%	27%	59%	32%	65%	8%	64%	32%	59%	14%	6%	16%	21%	18%	9%	10%	17%
Not thought about it	12	2	6	4	4	3	4	3	10	2	3	3	3	4	3	3	3	4	1
	10%	8%	8%	14%	5%	13%	7%	16%	11%	6%	6%	26%	9%	11%	9%	11%	9%	10%	9%
		15%	54%	31%	38%	29%	31%	22%	84%	16%	29%	24%	22%	38%	22%	22%	25%	38%	9%
Don't know	13	3	5	5	5	4	4	5	8	3	9	1	2	3	2	-	3	3	1
	11%	14%	7%	20%	6%	15%	9%	32%	9%	12%	15%	10%	6%	6%	6%	-%	11%	6%	7%
		24%	38%	38%	38%	29%	34%	40%	65%	27%	65%	9%	14%	20%	12%	-%	26%	20%	6%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 56**

**B14A. If you had to replace ISDN2/ISDN2e, which service do you think would be the best replacement? (SINGLE CODE)**

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION												
	Total	UNDER			OVER				ISDN2	ISDN30		ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP SWITCHED	IP NOT SWITCHED	ANY
		1-49	50-249	250+	£1M	£1M-£20M	£21M-£100M	£100M		ISDN30	ISDN2										
Significance Level: 95%		*a	b	c	*d	e	f	g	h	i	j	*k	l	*m	n	o	p	q	*r	s	
Unweighted total	141	23	32	86	19	39	43	37	141	61	80	-	61	-	67	43	67	53	12	67	
Effective Weighted Sample	98	19	31	79	13	28	37	32	98	60	49	-	60	-	55	42	55	44	10	55	
Total	139	46	40	53	29	43	35	28	139	52	87	-	52	-	57	37	57	47	9	57	
		33%	29%	38%	21%	31%	25%	20%	100%	37%	63%	-%	37%	-%	41%	27%	41%	33%	7%	41%	
Hosted VOIP	35	10	7	18	7	6	10	11	35	21	13	-	21	-	19	16	19	17	2	19	
	25%	21%	16%	35%	24%	14%	28%	40%	25%	41%	15%	-%	41%	-%	33%	45%	33%	36%	19%	33%	
								e		hj			hj		j	hj	j	j		j	
		28%	19%	53%	20%	17%	29%	32%	100%	62%	38%	-%	62%	-%	54%	48%	54%	49%	5%	54%	
ISDN30	29	12	8	9	9	8	7	5	29	8	21	-	8	-	12	6	12	10	3	12	
	21%	26%	19%	18%	31%	18%	20%	19%	21%	15%	24%	-%	15%	-%	21%	16%	21%	21%	28%	21%	
		41%	27%	32%	31%	27%	24%	18%	100%	26%	74%	-%	26%	-%	43%	21%	43%	34%	9%	43%	
IP Centrex	25	5	9	12	5	8	8	4	25	10	15	-	10	-	9	7	9	7	2	9	
	18%	10%	22%	22%	18%	18%	23%	16%	18%	19%	18%	-%	19%	-%	16%	18%	16%	15%	26%	16%	
		18%	36%	46%	21%	30%	31%	18%	100%	39%	61%	-%	39%	-%	37%	27%	37%	28%	10%	37%	
SIP Trunking	13	5	3	6	-	3	4	3	13	4	9	-	4	-	7	4	7	5	2	7	
	10%	10%	7%	11%	-%	7%	10%	12%	10%	8%	11%	-%	8%	-%	11%	11%	11%	10%	19%	11%	
		34%	21%	45%	-%	24%	27%	25%	100%	30%	70%	-%	30%	-%	49%	30%	49%	36%	14%	49%	
Non-IP Centrex	13	6	4	2	6	3	3	1	13	2	11	-	2	-	4	-	4	3	-	4	
	9%	13%	10%	5%	22%	6%	7%	3%	9%	3%	13%	-%	3%	-%	6%	-%	6%	7%	-%	6%	
											o										
		47%	33%	19%	51%	22%	21%	6%	100%	13%	87%	-%	13%	-%	28%	-%	28%	25%	-%	28%	
Leased lines / VPN	8	-	6	3	*	5	2	1	8	2	7	-	2	-	3	1	3	2	1	3	
	6%	-%	14%	5%	1%	11%	5%	3%	6%	3%	8%	-%	3%	-%	5%	2%	5%	4%	8%	5%	
		-%	66%	34%	5%	59%	22%	9%	100%	19%	81%	-%	19%	-%	31%	9%	31%	22%	9%	31%	
Ethernet	5	4	-	1	1	2	1	1	5	3	2	-	3	-	2	1	2	2	-	2	
	3%	8%	-%	2%	3%	4%	2%	5%	3%	6%	2%	-%	6%	-%	4%	2%	4%	5%	-%	4%	
		74%	-%	26%	21%	33%	17%	30%	100%	61%	39%	-%	61%	-%	46%	17%	46%	46%	-%	46%	
Don't know	12	6	4	1	-	10	1	*	12	3	8	-	3	-	2	2	2	1	-	2	
	8%	13%	11%	2%	-%	22%	4%	2%	8%	6%	10%	-%	6%	-%	4%	6%	4%	2%	-%	4%	
			c			fg															
		54%	39%	7%	-%	84%	13%	4%	100%	27%	73%	-%	27%	-%	18%	18%	18%	9%	-%	18%	
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																					

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 56

B14A. If you had to replace ISDN2/ISDN2e, which service do you think would be the best replacement? (SINGLE CODE)

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	*b	*c	d	e	f	*g	h	*i	j	k	l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	141	123	18	-	88	53	33	28	42	25	105	36	94	11	58	83	43	94
Effective Weighted Sample	98	83	18	-	60	37	32	28	34	21	77	22	72	7	42	56	27	81
Total	139	124	16	-	82	57	28	24	38	20	103	37	88	15	62	77	57	80
		89%	11%	-%	59%	41%	20%	17%	27%	14%	74%	26%	63%	11%	45%	55%	41%	57%
Hosted VOIP	35	26	9	-	17	17	11	10	13	6	26	9	21	5	14	21	12	23
	25%	21%	58%	-%	21%	31%	40%	43%	34%	29%	25%	25%	24%	31%	23%	27%	21%	28%
		74%	26%	-%	50%	50%	32%	30%	37%	17%	74%	26%	61%	13%	41%	59%	35%	65%
ISDN30	29	28	1	-	21	8	7	1	8	4	19	9	19	1	11	18	11	17
	21%	23%	5%	-%	25%	14%	24%	3%	22%	20%	19%	26%	21%	5%	17%	24%	20%	22%
		97%	3%	-%	72%	28%	24%	3%	29%	14%	67%	33%	64%	3%	37%	63%	39%	61%
IP Centrex	25	24	2	-	16	9	5	5	6	4	20	6	18	1	12	13	6	19
	18%	19%	10%	-%	20%	16%	17%	22%	15%	19%	19%	16%	21%	8%	19%	17%	11%	23%
		94%	6%	-%	65%	35%	19%	21%	22%	15%	77%	23%	73%	5%	47%	53%	24%	74%
SIP Trunking	13	12	2	-	10	4	2	2	5	1	13	-	13	*	7	7	5	8
	10%	10%	10%	-%	12%	7%	6%	10%	14%	6%	13%	-%	15%	3%	11%	9%	9%	10%
		88%	12%	-%	71%	29%	12%	18%	40%	9%	100%	-%	97%	3%	50%	50%	40%	60%
Non-IP Centrex	13	13	-	-	3	9	1	1	4	-	11	2	8	3	9	4	8	3
	9%	10%	-%	-%	4%	17%	3%	3%	9%	-%	10%	5%	9%	19%	14%	5%	14%	4%
		100%	-%	-%	24%	76%	6%	6%	28%	-%	86%	14%	63%	22%	68%	32%	62%	27%
Leased lines / VPN	8	7	2	-	4	4	1	1	-	3	5	3	4	1	6	3	2	6
	6%	6%	10%	-%	5%	7%	3%	3%	-%	13%	5%	8%	5%	9%	9%	3%	4%	7%
		81%	19%	-%	52%	48%	9%	9%	-%	31%	64%	36%	48%	17%	69%	31%	27%	69%
Ethernet	5	5	-	-	2	3	2	1	1	1	5	-	4	*	3	1	2	2
	3%	4%	-%	-%	3%	4%	8%	3%	2%	7%	5%	-%	5%	3%	5%	2%	4%	3%
		100%	-%	-%	46%	54%	45%	17%	17%	30%	100%	-%	91%	9%	70%	30%	49%	51%
Don't know	12	11	1	-	9	2	-	3	1	1	4	7	1	3	1	11	10	1
	8%	9%	7%	-%	11%	4%	-%	13%	3%	5%	4%	20%	1%	21%	2%	14%	17%	2%
											j				n		q	
		91%	9%	-%	79%	21%	-%	27%	9%	9%	36%	64%	9%	27%	9%	91%	84%	13%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		



# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 56**

**B14A. If you had to replace ISDN2/ISDN2e, which service do you think would be the best replacement? (SINGLE CODE)**

Base : Those who use ISN2/2e (and mostly use an ISDN service)

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
	Total	NEVER			YES	NO	YES	NO/DK	UP TO		YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
		LAST YEAR	EVER	/DK					3 YEARS	4+ YEARS									
Significance Level: 95%		*a	b	c	d	e	f	*g	h	i	j	*k	l	m	n	*o	p	q	*r
Unweighted total	141	27	81	33	93	33	55	19	104	30	63	11	37	45	37	22	44	50	17
Effective Weighted Sample	98	19	63	19	67	20	35	13	74	21	42	6	29	41	33	16	39	41	14
Total	139	27	76	37	91	33	56	25	103	26	69	13	33	36	30	21	36	43	14
		19%	54%	26%	65%	23%	41%	18%	74%	19%	50%	9%	24%	26%	21%	15%	26%	31%	10%
Hosted VOIP	35	7	21	7	24	5	11	5	23	7	11	5	13	17	9	5	14	17	2
	25%	25%	28%	19%	27%	17%	19%	21%	22%	27%	17%	36%	40%	47%	30%	24%	38%	39%	13%
		19%	61%	20%	70%	16%	31%	15%	66%	20%	33%	13%	38%	48%	26%	14%	40%	49%	5%
ISDN30	29	5	10	14	17	9	10	6	21	8	14	2	7	7	9	4	8	7	5
	21%	19%	13%	38%	18%	28%	18%	25%	20%	32%	21%	18%	22%	20%	30%	21%	22%	16%	37%
		18%	34%	48%	58%	31%	35%	22%	72%	28%	50%	8%	25%	25%	31%	15%	27%	25%	18%
IP Centrex	25	5	17	2	21	2	13	3	21	4	15	*	4	4	4	3	6	8	2
	18%	20%	23%	7%	23%	8%	23%	10%	21%	15%	22%	3%	11%	11%	13%	16%	17%	18%	11%
		21%	69%	10%	82%	10%	52%	10%	84%	16%	61%	2%	14%	15%	15%	13%	25%	31%	6%
SIP Trunking	13	5	5	3	10	2	7	-	10	2	7	-	5	5	5	2	5	6	*
	10%	18%	7%	9%	11%	6%	12%	-%	10%	8%	10%	-%	15%	13%	18%	10%	13%	14%	3%
		36%	40%	24%	76%	14%	51%	-%	74%	15%	51%	-%	37%	36%	40%	15%	35%	46%	3%
Non-IP Centrex	13	2	11	*	10	1	6	3	11	1	9	-	3	-	-	3	-	3	*
	9%	6%	14%	1%	11%	4%	11%	11%	10%	5%	13%	-%	9%	-%	-%	15%	-%	7%	3%
		13%	84%	3%	78%	11%	49%	22%	86%	11%	72%	-%	25%	-%	-%	25%	-%	25%	3%
Leased lines / VPN	8	-	7	2	5	3	4	2	7	2	5	*	-	3	*	1	1	-	3
	6%	-%	9%	4%	6%	8%	7%	7%	6%	7%	8%	3%	-%	7%	1%	6%	4%	-%	18%
		-%	81%	19%	64%	31%	48%	22%	78%	22%	64%	5%	-%	31%	5%	14%	17%	-%	31%
Ethernet	5	2	3	-	4	1	3	-	5	-	3	-	1	1	2	1	1	2	-
	3%	7%	4%	-%	4%	2%	4%	-%	5%	-%	4%	-%	2%	2%	7%	4%	4%	5%	-%
		40%	60%	-%	83%	17%	54%	-%	100%	-%	54%	-%	17%	17%	46%	17%	30%	46%	-%
Don't know	12	1	2	8	-	9	3	6	7	1	5	5	-	-	-	1	1	-	2
	8%	5%	3%	22%	-%	28%	6%	25%	6%	6%	7%	40%	-%	-%	-%	5%	3%	-%	15%
		12%	18%	70%	-%	79%	27%	55%	57%	13%	39%	43%	-%	-%	-%	9%	9%	-%	18%
Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																			

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 57

**B14B. If you had to replace ISDN30, which service do you think would be the best replacement? (SINGLE CODE)**

Base : Those who use ISN30 (and mostly use an ISDN service)

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION												
	Total	UNDER			£1M	£1M-£20M	£21M-£100M		ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP SWITCHED		IP NOT SWITCHED	ANY IP
		1-49	50-249	250+			£100M	0M										ISDN	ISDN		
Significance Level: 95%		*a	b	c	*d	e	f	g	h	i	*j	k	l	*m	n	o	p	q	*r	s	
Unweighted total	137	25	32	79	16	37	45	37	61	137	-	76	61	-	43	61	61	52	8	61	
Effective Weighted Sample	133	25	32	79	16	36	44	36	60	133	-	74	60	-	42	60	60	51	8	60	
Total	122	26	33	62	16	35	41	29	52	122	-	70	52	-	37	54	54	47	7	54	
		22%	27%	51%	13%	29%	33%	24%	43%	100%	-%	57%	43%	-%	30%	45%	45%	38%	6%	45%	
IP Centrex	33	8	6	18	6	13	6	7	13	33	-	19	13	-	10	14	14	12	2	14	
	27%	32%	19%	29%	36%	37%	15%	25%	26%	27%	-%	28%	26%	-%	26%	27%	27%	26%	35%	27%	
		26%	19%	55%	17%	40%	19%	22%	41%	100%	-%	59%	41%	-%	30%	44%	44%	37%	7%	44%	
ISDN2/2e	24	6	8	9	3	3	11	7	9	24	-	14	9	-	9	14	14	14	-	14	
	20%	24%	25%	15%	19%	8%	26%	26%	18%	20%	-%	21%	18%	-%	23%	25%	25%	29%	-%	25%	
		26%	34%	40%	13%	12%	44%	31%	39%	100%	-%	61%	39%	-%	36%	57%	57%	57%	-%	57%	
Hosted VOIP	20	2	5	13	2	1	11	6	12	20	-	8	12	-	8	11	11	11	1	11	
	16%	8%	16%	20%	13%	3%	28%	19%	24%	16%	-%	11%	24%	-%	23%	21%	21%	23%	12%	21%	
		11%	26%	63%	10%	6%	56%	28%	62%	100%	-%	38%	62%	-%	42%	57%	57%	53%	4%	57%	
SIP Trunking	15	4	3	8	1	6	4	4	9	15	-	6	9	-	8	9	9	8	2	9	
	12%	16%	9%	13%	6%	16%	11%	14%	18%	12%	-%	9%	18%	-%	21%	17%	17%	16%	26%	17%	
		27%	20%	52%	7%	38%	29%	26%	61%	100%	-%	39%	61%	-%	50%	62%	62%	50%	12%	62%	
Leased lines / VPN	7	-	4	3	-	4	3	1	2	7	-	6	2	-	1	3	3	2	1	3	
	6%	-%	13%	5%	-%	11%	6%	3%	3%	6%	-%	8%	3%	-%	2%	5%	5%	4%	15%	5%	
		-%	57%	43%	-%	53%	36%	11%	22%	100%	-%	78%	22%	-%	11%	39%	39%	25%	14%	39%	
Ethernet	5	1	1	3	-	2	1	2	3	5	-	3	3	-	1	1	1	1	-	1	
	4%	4%	3%	5%	-%	5%	3%	8%	5%	4%	-%	4%	5%	-%	2%	1%	1%	2%	-%	1%	
		21%	19%	59%	-%	36%	19%	45%	51%	100%	-%	49%	51%	-%	15%	15%	15%	15%	-%	15%	
Non-IP Centrex	4	1	1	2	-	3	1	-	2	4	-	2	2	-	-	-	-	-	-	-	
	3%	4%	3%	3%	-%	8%	2%	-%	3%	3%	-%	3%	3%	-%	-%	-%	-%	-%	-%	-%	
		28%	29%	44%	-%	78%	22%	-%	44%	100%	-%	56%	44%	-%	-%	-%	-%	-%	-%	-%	
Don't know	14	3	4	6	4	4	4	2	2	14	-	12	2	-	1	2	2	-	1	2	
	11%	13%	13%	10%	26%	11%	9%	6%	4%	11%	-%	17%	4%	-%	3%	3%	3%	-%	12%	3%	
		24%	30%	46%	29%	27%	26%	11%	15%	100%	-%	85%	15%	-%	7%	13%	13%	-%	6%	13%	
Columns Tested:	a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																				

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 57**

**B14B. If you had to replace ISDN30, which service do you think would be the best replacement? (SINGLE CODE)**

Base : Those who use ISN30 (and mostly use an ISDN service)

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
Significance Level: 95%		a	b	*c	d	*e	f	g	h	*i	j	k	l	*m	n	o	p	q
Unweighted total	137	43	94	-	40	21	83	54	40	21	105	32	94	11	66	71	40	94
Effective Weighted Sample	133	42	91	-	40	21	80	53	39	21	103	30	92	11	64	70	38	93
Total	122	36	85	-	33	19	73	49	36	19	93	29	84	9	60	61	38	81
		30%	70%	-%	27%	15%	60%	40%	29%	15%	76%	24%	69%	8%	50%	50%	31%	66%
IP Centrex	33	7	26	-	7	7	16	17	7	7	26	7	22	4	20	13	15	18
	27%	19%	30%	-%	20%	35%	22%	35%	21%	38%	28%	24%	26%	46%	33%	21%	38%	23%
		21%	79%	-%	21%	20%	48%	52%	23%	21%	79%	21%	66%	13%	62%	38%	44%	56%
ISDN2/2e	24	5	19	-	6	3	19	5	13	1	21	3	20	1	11	13	4	18
	20%	15%	22%	-%	19%	17%	26%	10%	35%	6%	23%	10%	24%	9%	18%	21%	10%	22%
							g		g									
		22%	78%	-%	26%	13%	80%	20%	53%	4%	88%	12%	85%	3%	46%	54%	16%	76%
Hosted VOIP	20	10	9	-	8	4	13	7	5	6	15	5	14	2	14	6	3	17
	16%	29%	11%	-%	24%	23%	17%	15%	15%	33%	16%	16%	16%	17%	24%	9%	8%	21%
		b													o			
		53%	47%	-%	40%	22%	63%	37%	26%	31%	76%	24%	68%	8%	72%	28%	16%	84%
SIP Trunking	15	8	7	-	8	1	11	4	7	3	14	1	13	1	5	11	4	11
	12%	23%	8%	-%	25%	4%	15%	9%	19%	14%	15%	3%	16%	11%	7%	17%	10%	14%
		b			g													
		56%	44%	-%	56%	5%	71%	29%	45%	17%	95%	5%	88%	7%	30%	70%	26%	74%
Leased lines / VPN	7	2	6	-	2	-	3	4	2	1	3	4	3	-	4	4	4	4
	6%	4%	7%	-%	5%	-%	4%	9%	5%	6%	4%	13%	4%	-%	6%	6%	10%	5%
												j						
		22%	78%	-%	22%	-%	39%	61%	25%	14%	47%	53%	47%	-%	50%	50%	50%	50%
Ethernet	5	2	3	-	1	2	2	3	1	-	5	-	5	-	1	4	1	4
	4%	5%	4%	-%	2%	10%	3%	6%	2%	-%	6%	-%	6%	-%	2%	7%	3%	5%
		36%	64%	-%	15%	36%	41%	59%	15%	-%	100%	-%	100%	-%	21%	79%	21%	79%
Non-IP Centrex	4	1	3	-	2	-	-	4	-	-	2	2	2	-	2	2	2	2
	3%	2%	3%	-%	5%	-%	-%	7%	-%	-%	2%	6%	2%	-%	3%	3%	5%	2%
					f			f										
		22%	78%	-%	44%	-%	-%	100%	-%	-%	51%	49%	51%	-%	51%	49%	56%	44%
Don't know	14	1	13	-	-	2	10	4	1	1	6	8	4	2	4	10	6	7
	11%	3%	15%	-%	-%	11%	14%	8%	3%	4%	6%	28%	5%	17%	6%	16%	15%	8%
		a					d					j						
		7%	93%	-%	-%	15%	72%	28%	7%	6%	42%	58%	30%	11%	27%	73%	43%	49%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 57**

**B14B. If you had to replace ISDN30, which service do you think would be the best replacement? (SINGLE CODE)**

Base : Those who use ISN30 (and mostly use an ISDN service)

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
	Total	LAST YEAR	EVER	NEVER	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%		*a	b	*c	d	*e	f	*g	h	i	j	*k	l	m	n	*o	p	q	*r
Unweighted total	137	26	83	28	95	29	59	17	102	32	64	12	34	47	31	25	36	48	13
Effective Weighted Sample	133	26	80	27	92	28	57	17	99	31	62	12	33	46	30	25	35	47	13
Total	122	22	74	25	83	26	51	16	91	28	56	11	30	42	27	23	31	43	12
		18%	61%	21%	68%	21%	42%	13%	74%	23%	46%	9%	25%	34%	22%	19%	26%	35%	10%
IP Centrex	33	4	23	6	26	5	15	3	24	8	18	-	6	9	8	7	8	9	5
	27%	16%	31%	23%	31%	20%	30%	19%	27%	30%	32%	-%	19%	22%	30%	28%	25%	22%	45%
		11%	71%	18%	79%	16%	47%	9%	74%	26%	56%	-%	18%	28%	25%	20%	24%	28%	16%
ISDN2/2e	24	7	13	4	19	3	9	1	19	5	8	2	11	11	8	5	9	14	-
	20%	32%	18%	14%	23%	10%	18%	5%	21%	19%	15%	18%	36%	26%	28%	22%	27%	32%	-%
		30%	55%	15%	80%	11%	39%	3%	78%	22%	34%	8%	45%	45%	32%	22%	36%	57%	-%
Hosted VOIP	20	3	15	2	17	2	7	2	17	3	8	-	4	11	7	3	9	11	1
	16%	14%	20%	7%	20%	7%	13%	11%	19%	9%	15%	-%	14%	26%	26%	11%	28%	25%	7%
		16%	75%	9%	86%	9%	33%	9%	87%	13%	43%	-%	21%	53%	35%	13%	45%	53%	4%
SIP Trunking	15	6	8	2	12	3	6	-	13	3	6	-	8	8	2	5	4	7	3
	12%	26%	10%	7%	15%	11%	11%	-%	14%	9%	10%	-%	26%	20%	6%	22%	13%	16%	22%
		38%	50%	12%	82%	18%	38%	-%	83%	17%	38%	-%	n	52%	55%	10%	34%	28%	45%
Leased lines / VPN	7	1	4	3	2	4	3	2	4	3	3	2	1	2	3	3	-	1	2
	6%	4%	5%	10%	2%	17%	5%	11%	5%	10%	5%	15%	3%	4%	11%	12%	-%	2%	18%
		11%	53%	36%	25%	61%	36%	25%	61%	39%	39%	22%	11%	25%	39%	39%	-%	11%	28%
Ethernet	5	2	3	-	5	-	5	-	5	1	4	1	1	-	-	1	-	1	-
	4%	9%	5%	-%	5%	-%	9%	-%	5%	3%	7%	7%	3%	-%	-%	3%	-%	2%	-%
		36%	64%	-%	85%	-%	85%	-%	85%	15%	70%	15%	15%	-%	-%	15%	-%	15%	-%
Non-IP Centrex	4	-	3	1	-	4	2	2	4	-	4	-	-	-	-	-	-	-	-
	3%	-%	4%	4%	-%	14%	4%	11%	4%	-%	6%	-%	-%	-%	-%	-%	-%	-%	-%
		-%	72%	28%	-%	100%	51%	49%	100%	-%	100%	-%	-%	-%	-%	-%	-%	-%	-%
Don't know	14	-	5	9	2	6	5	7	5	6	6	6	-	1	-	-	2	1	1
	11%	-%	7%	34%	3%	22%	10%	43%	6%	20%	10%	60%	-%	2%	-%	-%	6%	2%	9%
		-%	38%	62%	17%	41%	36%	51%	38%	40%	40%	47%	-%	6%	-%	-%	13%	6%	7%
Columns Tested:	a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																		

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 58**

**C1. Have you heard of IP-based alternatives to (ISDN2/2e/ ISDN30) (for example SIP trunking or IP Voice)? IP-based solutions are services based on internet protocol technology that can be used as a replacement for (ISDN2/2e/ ISDN30) services. This includes Voice over IP (VOIP) telephony services, including SIP Trunking solutions and Centrex services provided by IP networks (so called 'hosted VOIP' solutions). Voice over Internet Protocol (VoIP) technology lets you use the Internet to make and receive telephone calls. (SINGLE CODE)**

Base : Those who use ISN2/2e or ISDN30 and do not use IP-based alternatives

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30 ONLY	ISDN2 ONLY	ISDN30 BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP SWITCHED		IP NOT SWITCHED	ANY IP
					£1M	£1M-£20M	£21M-£100M	OVER £100M									ISDN	ISDN		
		a	*b	c	*d	e	f	*g	h	i	j	k	*l	*m	*n	*o	*p	*q	*r	*s
Significance Level: 95%																				
Unweighted total	132	34	27	70	23	47	38	21	74	76	56	58	18	-	-	-	-	-	-	-
Effective Weighted Sample	96	27	26	65	16	35	33	18	48	73	35	56	18	-	-	-	-	-	-	-
Total	134	55	33	46	31	51	32	15	82	67	67	52	15	-	-	-	-	-	-	-
		41%	25%	34%	23%	38%	24%	11%	61%	50%	50%	39%	11%	-%	-%	-%	-%	-%	-%	-%
Yes, I have heard of IP based alternatives to (ISDN2/2e/ ISDN30)	95	33	24	38	18	35	24	13	56	51	44	38	13	-	-	-	-	-	-	-
	71%	61%	71%	83%	60%	69%	74%	85%	69%	76%	66%	74%	83%	-%	-%	-%	-%	-%	-%	-%
		35%	25%	40%	19%	37%	25%	14%	60%	54%	46%	40%	13%	-%	-%	-%	-%	-%	-%	-%
No, I have never heard of IP based alternatives to (ISDN2/2e/ ISDN30)	28	15	8	6	8	13	6	1	19	10	18	9	2	-	-	-	-	-	-	-
	21%	27%	23%	12%	26%	25%	20%	6%	24%	15%	27%	17%	10%	-%	-%	-%	-%	-%	-%	-%
		53%	27%	20%	29%	45%	23%	3%	69%	37%	63%	31%	6%	-%	-%	-%	-%	-%	-%	-%
Don't know	11	7	2	2	4	3	2	1	6	6	5	5	1	-	-	-	-	-	-	-
	8%	12%	6%	4%	14%	6%	6%	9%	7%	9%	7%	9%	7%	-%	-%	-%	-%	-%	-%	-%
		63%	19%	18%	39%	29%	19%	13%	55%	54%	46%	45%	10%	-%	-%	-%	-%	-%	-%	-%
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																				

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 58**

**C1. Have you heard of IP-based alternatives to (ISDN2/2e/ ISDN30) (for example SIP trunking or IP Voice)? IP-based solutions are services based on internet protocol technology that can be used as a replacement for (ISDN2/2e/ ISDN30) services. This includes Voice over IP (VOIP) telephony services, including SIP Trunking solutions and Centrex services provided by IP networks (so called 'hosted VOIP' solutions). Voice over Internet Protocol (VoIP) technology lets you use the Internet to make and receive telephone calls. (SINGLE CODE)**

Base : Those who use ISN2/2e or ISDN30 and do not use IP-based alternatives

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
Significance Level: 95%		a	b	*c	d	e	f	g	*h	*i	j	k	l	*m	n	o	p	q
Unweighted total	132	71	61	-	43	31	44	32	-	-	88	44	69	19	62	70	52	73
Effective Weighted Sample	96	46	59	-	26	22	42	31	-	-	67	29	55	13	48	48	35	65
Total	134	79	54	-	46	36	38	29	-	-	88	46	66	22	64	69	65	63
		59%	41%	-%	34%	27%	29%	22%	-%	-%	66%	34%	50%	16%	48%	52%	49%	47%
Yes, I have heard of IP based alternatives to (ISDN2/2e/ ISDN30)	95	55	40	-	35	21	30	21	-	-	74	21	63	11	51	44	42	51
	71%	69%	73%	-%	78%	58%	77%	74%	-%	-%	84%	45%	94%	53%	79%	63%	65%	81%
		58%	42%	-%	37%	22%	31%	23%	-%	-%	78%	22%	66%	12%	54%	46%	45%	54%
No, I have never heard of IP based alternatives to (ISDN2/2e/ ISDN30)	28	18	10	-	10	10	5	6	-	-	10	18	2	8	8	20	18	7
	21%	23%	18%	-%	21%	26%	13%	19%	-%	-%	11%	39%	3%	36%	13%	28%	28%	11%
		66%	34%	-%	35%	34%	17%	20%	-%	-%	36%	64%	8%	28%	30%	70%	66%	23%
Don't know	11	6	5	-	*	6	4	2	-	-	4	7	1	2	5	6	5	5
	8%	8%	9%	-%	1%	15%	10%	7%	-%	-%	4%	16%	2%	10%	8%	8%	7%	8%
		55%	45%	-%	4%	51%	34%	20%	-%	-%	34%	66%	13%	20%	46%	54%	43%	47%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 58**

**C1. Have you heard of IP-based alternatives to (ISDN2/2e/ ISDN30) (for example SIP trunking or IP Voice)? IP-based solutions are services based on internet protocol technology that can be used as a replacement for (ISDN2/2e/ ISDN30) services. This includes Voice over IP (VOIP) telephony services, including SIP Trunking solutions and Centrex services provided by IP networks (so called 'hosted VOIP' solutions). Voice over Internet Protocol (VoIP) technology lets you use the Internet to make and receive telephone calls. (SINGLE CODE)**

Base : Those who use ISN2/2e or ISDN30 and do not use IP-based alternatives

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
								UP TO 3 YEARS							4+ YEARS			
	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	YES	NO/DK	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	YES	NO/DK		
	Total	*a	b	c	d	e	f	g	h	i	j	*k	*l	*m	*n	*o	*p	*q
Significance Level: 95%																		
Unweighted total	132	15	80	37	75	40	99	33	93	31	110	22	-	-	-	-	-	-
Effective Weighted Sample	96	10	66	24	56	26	72	25	69	24	81	15	-	-	-	-	-	-
Total	134	18	74	42	77	39	95	39	94	28	111	22	-	-	-	-	-	-
		13%	55%	32%	57%	29%	71%	29%	70%	21%	83%	17%	-%	-%	-%	-%	-%	-%
Yes, I have heard of IP based alternatives to (ISDN2/2e/ ISDN30)	95	16	59	20	70	18	95	-	76	14	89	6	-	-	-	-	-	-
	71%	92%	79%	47%	92%	47%	100%	-%	81%	51%	80%	27%	-%	-%	-%	-%	-%	-%
			c	e			g		i									
		17%	62%	21%	74%	19%	100%	-%	80%	15%	94%	6%	-%	-%	-%	-%	-%	-%
No, I have never heard of IP based alternatives to (ISDN2/2e/ ISDN30)	28	1	11	16	5	17	-	28	14	13	20	8	-	-	-	-	-	-
	21%	8%	15%	37%	7%	44%	-%	72%	15%	45%	18%	34%	-%	-%	-%	-%	-%	-%
			b	d			f		h									
		5%	39%	56%	20%	60%	-%	100%	50%	45%	73%	27%	-%	-%	-%	-%	-%	-%
Don't know	11	-	4	7	1	3	-	11	4	1	2	9	-	-	-	-	-	-
	8%	-%	6%	16%	1%	9%	-%	28%	4%	4%	2%	39%	-%	-%	-%	-%	-%	-%
				f														
		-%	39%	61%	7%	32%	-%	100%	37%	11%	20%	80%	-%	-%	-%	-%	-%	-%
Columns Tested:	a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																	

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 59

C2A. Do you have any plans to move some or all of your existing (ISDN2/2e/ ISDN30) voice services to IP in the next 4 years? (SINGLE CODE)

Base : All ISDN users not using but aware of IP-based alternatives

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION												ANY IP *s
	Total	UNDER			£1M- £20M	£21M-£10 OVER		ISDN2	ISDN30		ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP SWITCHED		IP NOT SWITCHED	
		1-49	50-249	250+		£1M	£20M		£100M	ISDN2								ISDN30	ISDN		
Significance Level: 95%		*a	*b	c	*d	e	*f	*g	h	i	j	k	*l	*m	*n	*o	*p	*q	*r		
Unweighted total	99	21	19	58	16	34	28	18	55	59	40	44	15	-	-	-	-	-	-	-	
Effective Weighted Sample	72	16	19	54	11	25	24	16	35	57	24	42	15	-	-	-	-	-	-	-	
Total	95	33	24	38	18	35	24	13	56	51	44	38	13	-	-	-	-	-	-	-	
		35%	25%	40%	19%	37%	25%	14%	60%	54%	46%	40%	13%	-%	-%	-%	-%	-%	-%	-%	
Yes, some within the next 2 years	33	12	7	14	8	6	11	4	24	14	18	8	6	-	-	-	-	-	-	-	
	34%	37%	28%	36%	44%	16%	47%	31%	43%	28%	42%	22%	48%	-%	-%	-%	-%	-%	-%	-%	
		38%	20%	42%	25%	17%	34%	12%	74%	44%	56%	26%	19%	-%	-%	-%	-%	-%	-%	-%	
Yes, some in the next 2 to 4 years	31	7	10	14	4	14	7	5	18	18	13	13	6	-	-	-	-	-	-	-	
	33%	21%	43%	37%	22%	41%	31%	42%	32%	36%	29%	33%	44%	-%	-%	-%	-%	-%	-%	-%	
		22%	33%	45%	13%	46%	24%	17%	59%	59%	41%	41%	18%	-%	-%	-%	-%	-%	-%	-%	
Yes, all within the next 2 years	18	8	6	4	4	9	4	1	8	11	7	10	1	-	-	-	-	-	-	-	
	19%	25%	25%	10%	21%	26%	15%	9%	14%	21%	16%	25%	8%	-%	-%	-%	-%	-%	-%	-%	
		47%	33%	20%	22%	51%	20%	7%	46%	60%	40%	54%	6%	-%	-%	-%	-%	-%	-%	-%	
Yes, all in the next 2 to 4 years	5	1	-	4	1	1	2	2	-	5	-	5	-	-	-	-	-	-	-	-	
	5%	3%	-%	10%	5%	2%	7%	12%	-%	10%	-%	13%	-%	-%	-%	-%	-%	-%	-%	-%	
		20%	-%	80%	20%	16%	32%	32%	-%	h 100%	-%	h 100%	-%	-%	-%	-%	-%	-%	-%	-%	
No	4	1	1	1	1	1	-	-	2	2	2	2	-	-	-	-	-	-	-	-	
	4%	4%	4%	3%	8%	4%	-%	-%	3%	4%	4%	5%	-%	-%	-%	-%	-%	-%	-%	-%	
		39%	28%	33%	40%	39%	-%	-%	50%	50%	50%	50%	-%	-%	-%	-%	-%	-%	-%	-%	
Don't know	5	3	-	2	-	4	-	1	4	1	4	1	-	-	-	-	-	-	-	-	
	5%	9%	-%	4%	-%	11%	-%	6%	7%	2%	9%	2%	-%	-%	-%	-%	-%	-%	-%	-%	
		66%	-%	34%	-%	83%	-%	17%	83%	17%	83%	17%	-%	-%	-%	-%	-%	-%	-%	-%	

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s



# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 59

C2A. Do you have any plans to move some or all of your existing (ISDN2/2e/ ISDN30) voice services to IP in the next 4 years? (SINGLE CODE)

Base : All ISDN users not using but aware of IP-based alternatives

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR		SPEND ON COMMS	
	Total				ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30		IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	UNDER		UNDER	
		ISDN2	ISDN30	IP			PRIMARY	NOT PRIMARY							10 YEARS	10+ YEARS	£100K	£100K+
Significance Level: 95%	a	b	*c	d	*e	f	*g	*h	*i	j	*k	l	*m	n	o	p	q	
Unweighted total	99	53	46	-	34	21	35	24	-	-	76	23	64	12	51	48	36	61
Effective Weighted Sample	72	34	44	-	21	15	33	24	-	-	59	13	51	8	40	32	24	55
Total	95	55	40	-	35	21	30	21	-	-	74	21	63	11	51	44	42	51
		58%	42%	-%	37%	22%	31%	23%	-%	-%	78%	22%	66%	12%	54%	46%	45%	54%
Yes, some within the next 2 years	33	24	8	-	17	7	10	4	-	-	26	6	25	1	17	16	16	16
	34%	44%	21%	-%	49%	33%	35%	20%	-%	-%	35%	31%	40%	11%	33%	36%	39%	31%
		b																
		74%	26%	-%	53%	21%	31%	13%	-%	-%	81%	19%	77%	4%	51%	49%	50%	48%
Yes, some in the next 2 to 4 years	31	17	14	-	9	9	9	9	-	-	26	5	22	4	20	11	10	21
	33%	30%	36%	-%	25%	45%	30%	44%	-%	-%	35%	23%	35%	36%	39%	26%	23%	42%
		54%	46%	-%	29%	30%	28%	31%	-%	-%	85%	15%	71%	14%	64%	36%	31%	69%
Yes, all within the next 2 years	18	8	10	-	4	4	5	6	-	-	14	4	10	4	10	8	9	8
	19%	15%	24%	-%	12%	19%	16%	28%	-%	-%	18%	21%	15%	36%	19%	19%	20%	16%
		46%	54%	-%	24%	22%	27%	33%	-%	-%	76%	24%	53%	23%	54%	46%	48%	46%
Yes, all in the next 2 to 4 years	5	-	5	-	-	-	4	1	-	-	4	1	3	2	3	2	3	2
	5%	-%	12%	-%	-%	-%	14%	4%	-%	-%	6%	4%	4%	14%	5%	5%	8%	3%
		a																
		-%	100%	-%	-%	-%	84%	16%	-%	-%	84%	16%	52%	32%	52%	48%	68%	32%
No	4	2	2	-	2	-	1	1	-	-	2	1	2	-	1	2	*	3
	4%	3%	5%	-%	5%	-%	3%	5%	-%	-%	3%	7%	3%	-%	3%	5%	1%	6%
		50%	50%	-%	50%	-%	22%	28%	-%	-%	60%	40%	60%	-%	40%	60%	11%	89%
Don't know	5	4	1	-	3	1	1	-	-	-	2	3	1	*	1	4	4	1
	5%	7%	2%	-%	9%	4%	3%	-%	-%	-%	2%	15%	2%	4%	2%	9%	9%	2%
		83%	17%	-%	66%	18%	17%	-%	-%	-%	34%	66%	25%	9%	18%	82%	83%	17%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 59

C2A. Do you have any plans to move some or all of your existing (ISDN2/2e/ ISDN30) voice services to IP in the next 4 years? (SINGLE CODE)

Base : All ISDN users not using but aware of IP-based alternatives

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%		*a	b	*c	d	*e	f	*g	h	*i	j	*k	l	*m	n	o	p	q	*r
Unweighted total	99	14	66	19	69	23	99	-	77	19	91	8	-	-	-	-	-	-	-
Effective Weighted Sample	72	9	54	12	51	15	72	-	57	17	66	7	-	-	-	-	-	-	-
Total	95	16	59	20	70	18	95	-	76	14	89	6	-	-	-	-	-	-	-
		17%	62%	21%	74%	19%	100%	-%	80%	15%	94%	6%	-%	-%	-%	-%	-%	-%	-%
Yes, some within the next 2 years	33	13	13	6	29	2	33	-	30	3	31	2	-	-	-	-	-	-	-
	34%	82%	23%	29%	41%	9%	34%	-%	40%	19%	34%	33%	-%	-%	-%	-%	-%	-%	-%
		41%	41%	18%	89%	5%	100%	-%	92%	8%	94%	6%	-%	-%	-%	-%	-%	-%	-%
Yes, some in the next 2 to 4 years	31	1	26	4	25	3	31	-	28	1	30	1	-	-	-	-	-	-	-
	33%	7%	44%	21%	35%	18%	33%	-%	37%	8%	33%	24%	-%	-%	-%	-%	-%	-%	-%
		4%	83%	14%	79%	11%	100%	-%	92%	4%	95%	5%	-%	-%	-%	-%	-%	-%	-%
Yes, all within the next 2 years	18	-	16	2	13	4	18	-	13	5	17	1	-	-	-	-	-	-	-
	19%	-%	27%	11%	18%	23%	19%	-%	17%	35%	19%	17%	-%	-%	-%	-%	-%	-%	-%
		-%	88%	12%	70%	24%	100%	-%	72%	28%	94%	6%	-%	-%	-%	-%	-%	-%	-%
Yes, all in the next 2 to 4 years	5	2	2	2	3	2	5	-	3	2	5	-	-	-	-	-	-	-	-
	5%	11%	3%	8%	5%	9%	5%	-%	3%	17%	6%	-%	-%	-%	-%	-%	-%	-%	-%
		36%	32%	32%	68%	32%	100%	-%	52%	48%	100%	-%	-%	-%	-%	-%	-%	-%	-%
No	4	-	2	2	-	4	4	-	1	2	3	1	-	-	-	-	-	-	-
	4%	-%	3%	9%	-%	20%	4%	-%	2%	16%	3%	13%	-%	-%	-%	-%	-%	-%	-%
		-%	50%	50%	-%	100%	100%	-%	39%	61%	78%	22%	-%	-%	-%	-%	-%	-%	-%
Don't know	5	-	*	4	1	4	5	-	*	1	4	1	-	-	-	-	-	-	-
	5%	-%	1%	22%	1%	21%	5%	-%	1%	6%	4%	13%	-%	-%	-%	-%	-%	-%	-%
		-%	9%	91%	18%	82%	100%	-%	9%	17%	83%	17%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

Table 60

**C2B. Do you have any plans to add new additional IP-based voice services rather than new (ISDN2/2e/ ISDN30) in the next 4 years? (SINGLE CODE)**

Base : All ISDN users not using but aware of IP-based alternatives

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN2 & IP	IP SWITCHED	IP NOT SWITCHED	ANY IP
					£1M	£1M-£20M	£21M-£100M	£100M												
Significance Level: 95%		*a	*b	c	*d	e	*f	*g	h	i	j	k	l	*m	*n	*o	*p	*q	*r	*s
Unweighted total	99	21	19	58	16	34	28	18	55	59	40	44	15	-	-	-	-	-	-	-
Effective Weighted Sample	72	16	19	54	11	25	24	16	35	57	24	42	15	-	-	-	-	-	-	-
Total	95	33	24	38	18	35	24	13	56	51	44	38	13	-	-	-	-	-	-	-
		35%	25%	40%	19%	37%	25%	14%	60%	54%	46%	40%	13%	-%	-%	-%	-%	-%	-%	-%
Yes, within the next 2 years	50	21	11	18	11	15	12	8	36	24	26	15	9	-	-	-	-	-	-	-
	53%	62%	49%	48%	59%	44%	52%	61%	63%	48%	60%	38%	75%	-%	-%	-%	-%	-%	-%	-%
		41%	23%	36%	22%	31%	24%	16%	k	71%	48%	52%	29%	19%	-%	-%	-%	-%	-%	-%
Yes, in the next 2 to 4 years	34	7	11	16	6	13	11	4	15	22	12	19	3	-	-	-	-	-	-	-
	36%	22%	47%	42%	33%	37%	47%	33%	27%	44%	27%	50%	25%	-%	-%	-%	-%	-%	-%	-%
		21%	32%	47%	18%	38%	32%	12%	44%	65%	35%	h	56%	9%	-%	-%	-%	-%	-%	-%
No	9	6	1	3	1	7	*	-	6	4	6	4	-	-	-	-	-	-	-	-
	10%	17%	4%	7%	8%	19%	2%	-%	10%	7%	13%	9%	-%	-%	-%	-%	-%	-%	-%	-%
		59%	11%	30%	15%	72%	4%	-%	62%	38%	62%	38%	-%	-%	-%	-%	-%	-%	-%	-%
Don't know	1	-	-	1	-	-	-	1	-	1	-	1	-	-	-	-	-	-	-	-
	1%	-%	-%	2%	-%	-%	-%	6%	-%	2%	-%	2%	-%	-%	-%	-%	-%	-%	-%	-%
		-%	-%	100%	-%	-%	-%	100%	-%	100%	-%	100%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 60

C2B. Do you have any plans to add new additional IP-based voice services rather than new (ISDN2/2e/ ISDN30) in the next 4 years? (SINGLE CODE)

Base : All ISDN users not using but aware of IP-based alternatives

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
Significance Level: 95%		a	b	*c	d	*e	f	*g	*h	*i	j	*k	l	*m	n	o	p	q
Unweighted total	99	53	46	-	34	21	35	24	-	-	76	23	64	12	51	48	36	61
Effective Weighted Sample	72	34	44	-	21	15	33	24	-	-	59	13	51	8	40	32	24	55
Total	95	55	40	-	35	21	30	21	-	-	74	21	63	11	51	44	42	51
		58%	42%	-%	37%	22%	31%	23%	-%	-%	78%	22%	66%	12%	54%	46%	45%	54%
Yes, within the next 2 years	50	34	16	-	22	14	15	9	-	-	45	6	41	4	31	19	21	28
	53%	62%	41%	-%	62%	65%	50%	44%	-%	-%	60%	27%	65%	38%	62%	43%	49%	55%
		68%	32%	-%	44%	27%	29%	19%	-%	-%	89%	11%	80%	9%	62%	38%	41%	56%
Yes, in the next 2 to 4 years	34	15	19	-	8	7	11	11	-	-	25	10	19	6	18	16	17	17
	36%	28%	48%	-%	23%	33%	39%	51%	-%	-%	33%	46%	30%	52%	36%	37%	41%	33%
		44%	56%	-%	24%	21%	33%	32%	-%	-%	72%	28%	55%	17%	53%	47%	50%	50%
No	9	6	4	-	5	*	3	1	-	-	4	6	3	1	1	8	4	5
	10%	11%	9%	-%	15%	2%	9%	5%	-%	-%	5%	27%	4%	11%	3%	18%	10%	10%
		62%	38%	-%	57%	4%	27%	11%	-%	-%	41%	59%	28%	13%	15%	85%	46%	54%
Don't know	1	-	1	-	-	-	1	-	-	-	1	-	1	-	-	1	-	1
	1%	-%	2%	-%	-%	-%	3%	-%	-%	-%	1%	-%	1%	-%	-%	2%	-%	2%
		-%	100%	-%	-%	-%	100%	-%	-%	-%	100%	-%	100%	-%	-%	100%	-%	100%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 60

C2B. Do you have any plans to add new additional IP-based voice services rather than new (ISDN2/2e/ ISDN30) in the next 4 years? (SINGLE CODE)

Base : All ISDN users not using but aware of IP-based alternatives

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%		*a	b	*c	d	*e	f	*g	h	*i	j	*k	*l	*m	*n	*o	*p	*q	*r
Unweighted total	99	14	66	19	69	23	99	-	77	19	91	8	-	-	-	-	-	-	-
Effective Weighted Sample	72	9	54	12	51	15	72	-	57	17	66	7	-	-	-	-	-	-	-
Total	95	16	59	20	70	18	95	-	76	14	89	6	-	-	-	-	-	-	-
		17%	62%	21%	74%	19%	100%	-%	80%	15%	94%	6%	-%	-%	-%	-%	-%	-%	-%
Yes, within the next 2 years	50	13	30	7	45	2	50	-	48	2	48	2	-	-	-	-	-	-	-
	53%	82%	51%	36%	64%	11%	53%	-%	64%	16%	54%	33%	-%	-%	-%	-%	-%	-%	-%
		27%	59%	15%	89%	4%	100%	-%	96%	4%	96%	4%	-%	-%	-%	-%	-%	-%	-%
Yes, in the next 2 to 4 years	34	3	25	6	24	7	34	-	25	8	33	1	-	-	-	-	-	-	-
	36%	18%	43%	30%	35%	40%	36%	-%	32%	56%	37%	24%	-%	-%	-%	-%	-%	-%	-%
		9%	74%	17%	71%	21%	100%	-%	71%	23%	96%	4%	-%	-%	-%	-%	-%	-%	-%
No	9	-	3	6	1	8	9	-	3	3	8	2	-	-	-	-	-	-	-
	10%	-%	6%	30%	2%	45%	10%	-%	4%	23%	9%	30%	-%	-%	-%	-%	-%	-%	-%
		-%	37%	63%	13%	87%	100%	-%	32%	34%	81%	19%	-%	-%	-%	-%	-%	-%	-%
Don't know	1	-	-	1	-	1	1	-	-	1	-	1	-	-	-	-	-	-	-
	1%	-%	-%	4%	-%	4%	1%	-%	-%	6%	-%	13%	-%	-%	-%	-%	-%	-%	-%
		-%	-%	100%	-%	100%	100%	-%	-%	100%	-%	100%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 61**

**C5A. What concerns, if any, do you have about moving to IP technologies? (MULTI CODE)**

Base : All ISDN users not using but aware of IP-based alternatives

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION												ANY IP *s
	Total	UNDER			ISDN2	ISDN30 ONLY	ISDN2 ONLY	ISDN30 BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP SWITCHED	IP NOT SWITCHED							
		1-49	50-249	250+									*q	*r							
Significance Level: 95%		*a	*b	c	*d	£1M- £20M	£21M-£10 0M	OVER £100M	h	i	j	k	*l	*m	*n	*o	*p	*q	*r	*s	
Unweighted total	99	21	19	58	16	34	28	18	55	59	40	44	15	-	-	-	-	-	-	-	
Effective Weighted Sample	72	16	19	54	11	25	24	16	35	57	24	42	15	-	-	-	-	-	-	-	
Total	95	33	24	38	18	35	24	13	56	51	44	38	13	-	-	-	-	-	-	-	
		35%	25%	40%	19%	37%	25%	14%	60%	54%	46%	40%	13%	-%	-%	-%	-%	-%	-%	-%	
Reliability	47	18	12	17	10	16	8	7	33	21	26	14	7	-	-	-	-	-	-	-	
	49%	53%	50%	45%	55%	47%	36%	56%	59%	41%	59%	36%	56%	-%	-%	-%	-%	-%	-%	-%	
									k												
		38%	25%	37%	22%	35%	18%	15%	71%	44%	56%	29%	15%	-%	-%	-%	-%	-%	-%	-%	
Quality of service	40	15	10	15	7	15	12	6	30	18	22	10	8	-	-	-	-	-	-	-	
	42%	46%	41%	40%	39%	42%	52%	46%	54%	36%	50%	26%	67%	-%	-%	-%	-%	-%	-%	-%	
									k												
		38%	24%	38%	18%	37%	31%	15%	76%	45%	55%	24%	21%	-%	-%	-%	-%	-%	-%	-%	
Price	39	15	12	12	11	11	11	6	25	17	22	13	4	-	-	-	-	-	-	-	
	41%	46%	50%	31%	57%	31%	45%	44%	45%	34%	49%	35%	30%	-%	-%	-%	-%	-%	-%	-%	
		40%	30%	30%	27%	28%	28%	15%	66%	44%	56%	34%	10%	-%	-%	-%	-%	-%	-%	-%	
Resilience	30	12	10	8	5	14	6	4	17	16	14	13	3	-	-	-	-	-	-	-	
	31%	35%	41%	22%	26%	40%	24%	34%	30%	31%	32%	34%	23%	-%	-%	-%	-%	-%	-%	-%	
		39%	33%	28%	16%	47%	19%	15%	57%	53%	47%	43%	10%	-%	-%	-%	-%	-%	-%	-%	
Security	29	9	6	14	-	15	7	7	17	17	12	12	5	-	-	-	-	-	-	-	
	31%	27%	25%	38%	-%	42%	31%	57%	31%	34%	27%	31%	42%	-%	-%	-%	-%	-%	-%	-%	
		31%	20%	49%	-%	50%	25%	25%	59%	59%	41%	41%	18%	-%	-%	-%	-%	-%	-%	-%	
Cost of investment needed	20	6	5	9	6	4	6	4	13	12	8	7	5	-	-	-	-	-	-	-	
	21%	19%	21%	23%	30%	12%	24%	34%	23%	24%	17%	18%	41%	-%	-%	-%	-%	-%	-%	-%	
		31%	24%	44%	28%	22%	28%	22%	64%	62%	38%	36%	26%	-%	-%	-%	-%	-%	-%	-%	
Lack of commercial offerings	20	6	8	6	2	8	5	3	13	9	11	6	2	-	-	-	-	-	-	-	
	21%	17%	32%	17%	11%	22%	22%	22%	24%	17%	25%	16%	19%	-%	-%	-%	-%	-%	-%	-%	
		28%	39%	33%	10%	41%	27%	14%	68%	44%	56%	32%	12%	-%	-%	-%	-%	-%	-%	-%	
Unable to meet business needs	16	3	5	8	2	8	5	-	10	9	7	6	3	-	-	-	-	-	-	-	
	17%	10%	21%	20%	12%	23%	23%	-%	17%	17%	16%	16%	20%	-%	-%	-%	-%	-%	-%	-%	
		21%	30%	48%	14%	52%	35%	-%	61%	55%	45%	39%	16%	-%	-%	-%	-%	-%	-%	-%	

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 61

## C5A. What concerns, if any, do you have about moving to IP technologies? (MULTI CODE)

Base : All ISDN users not using but aware of IP-based alternatives

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION												IP SWITCHED	IP NOT SWITCHED	ANY IP
	Total	UNDER			ISDN2	ISDN30 ONLY	ISDN2 ONLY	ISDN30 BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	ISDN	ISDN									
		1-49	50-249	250+											£1M	£1M- £20M	£21M-£100M	£100M					
Significance Level: 95%		*a	*b	c	*d	e	*f	*g	h	i	j	k	*l	*m	*n	*o	*p	*q	*r	*s			
Unweighted total	99	21	19	58	16	34	28	18	55	59	40	44	15	-	-	-	-	-	-	-			
Effective Weighted Sample	72	16	19	54	11	25	24	16	35	57	24	42	15	-	-	-	-	-	-	-			
Total	95	33	24	38	18	35	24	13	56	51	44	38	13	-	-	-	-	-	-	-			
		35%	25%	40%	19%	37%	25%	14%	60%	54%	46%	40%	13%	-%	-%	-%	-%	-%	-%	-%			
Happy with current system	11	4	1	6	1	6	1	3	8	7	3	3	5	-	-	-	-	-	-	-			
	11%	11%	4%	16%	5%	16%	6%	22%	14%	14%	8%	7%	36%	-%	-%	-%	-%	-%	-%	-%			
		33%	10%	57%	8%	52%	14%	26%	76%	67%	33%	24%	43%	-%	-%	-%	-%	-%	-%	-%			
Immaturity of commercial offerings	10	1	5	4	2	4	4	1	6	7	3	4	3	-	-	-	-	-	-	-			
	11%	3%	21%	11%	10%	10%	17%	6%	10%	14%	7%	12%	20%	-%	-%	-%	-%	-%	-%	-%			
		10%	47%	43%	17%	36%	39%	8%	57%	69%	31%	43%	25%	-%	-%	-%	-%	-%	-%	-%			
Not available in my area	2	1	1	*	1	-	1	-	*	2	*	2	-	-	-	-	-	-	-	-			
	3%	3%	4%	1%	5%	-%	6%	-%	1%	4%	1%	5%	-%	-%	-%	-%	-%	-%	-%	-%			
		41%	42%	17%	41%	-%	59%	-%	17%	83%	17%	83%	-%	-%	-%	-%	-%	-%	-%	-%			
Don't know enough about it	1	-	-	1	-	*	1	-	1	1	*	-	1	-	-	-	-	-	-	-			
	1%	-%	-%	3%	-%	1%	3%	-%	2%	2%	1%	-%	6%	-%	-%	-%	-%	-%	-%	-%			
		-%	-%	100%	-%	35%	65%	-%	100%	65%	35%	-%	65%	-%	-%	-%	-%	-%	-%	-%			
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																							

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 61

## C5A. What concerns, if any, do you have about moving to IP technologies? (MULTI CODE)

Base : All ISDN users not using but aware of IP-based alternatives

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN30			ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		ISDN2	ISDN30	IP														
Significance Level: 95%		a	b	*c	d	*e	f	*g	*h	*i	j	*k	l	*m	n	o	p	q
Unweighted total	99	53	46	-	34	21	35	24	-	-	76	23	64	12	51	48	36	61
Effective Weighted Sample	72	34	44	-	21	15	33	24	-	-	59	13	51	8	40	32	24	55
Total	95	55	40	-	35	21	30	21	-	-	74	21	63	11	51	44	42	51
		58%	42%	-%	37%	22%	31%	23%	-%	-%	78%	22%	66%	12%	54%	46%	45%	54%
Reliability	47	33	14	-	21	12	12	9	-	-	34	12	29	6	26	21	22	23
	49%	60%	34%	-%	60%	57%	39%	43%	-%	-%	46%	60%	46%	49%	50%	48%	52%	46%
		b																
		71%	29%	-%	45%	25%	25%	20%	-%	-%	73%	27%	62%	12%	55%	45%	47%	50%
Quality of service	40	29	11	-	19	11	11	8	-	-	30	10	25	5	16	24	21	20
	42%	52%	29%	-%	54%	53%	36%	35%	-%	-%	41%	49%	40%	41%	32%	55%	48%	39%
		b																
		72%	28%	-%	48%	28%	27%	19%	-%	-%	75%	25%	63%	12%	40%	60%	51%	49%
Price	39	25	13	-	16	10	13	4	-	-	29	9	25	4	20	19	16	21
	41%	46%	33%	-%	44%	46%	45%	18%	-%	-%	40%	45%	41%	35%	39%	43%	39%	41%
		66%	34%	-%	41%	25%	34%	10%	-%	-%	76%	24%	66%	10%	52%	48%	42%	54%
Resilience	30	17	13	-	9	8	9	7	-	-	21	9	18	3	14	15	17	12
	31%	31%	32%	-%	25%	38%	30%	32%	-%	-%	28%	43%	28%	27%	28%	35%	41%	24%
		57%	43%	-%	30%	27%	30%	23%	-%	-%	70%	30%	59%	11%	49%	51%	58%	42%
Security	29	17	13	-	12	5	10	7	-	-	21	8	19	2	13	16	9	21
	31%	30%	32%	-%	34%	25%	35%	33%	-%	-%	28%	41%	31%	14%	26%	36%	21%	41%
		56%	44%	-%	41%	18%	35%	24%	-%	-%	71%	29%	66%	5%	46%	54%	30%	70%
Cost of investment needed	20	13	7	-	10	2	8	4	-	-	10	9	9	1	11	9	8	12
	21%	23%	18%	-%	29%	11%	27%	21%	-%	-%	14%	45%	15%	11%	21%	21%	18%	24%
		64%	36%	-%	52%	12%	40%	22%	-%	-%	53%	47%	47%	6%	53%	47%	39%	61%
Lack of commercial offerings	20	13	6	-	7	7	4	4	-	-	16	4	15	1	7	13	7	13
	21%	24%	16%	-%	19%	31%	15%	20%	-%	-%	21%	19%	24%	7%	13%	29%	16%	25%
		68%	32%	-%	35%	34%	23%	21%	-%	-%	80%	20%	76%	4%	34%	66%	36%	64%
Unable to meet business needs	16	9	7	-	3	6	4	4	-	-	14	2	12	1	10	6	4	12
	17%	16%	18%	-%	10%	29%	15%	20%	-%	-%	18%	11%	20%	11%	19%	14%	10%	23%
		56%	44%	-%	22%	39%	28%	28%	-%	-%	86%	14%	78%	8%	61%	39%	26%	74%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q



# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 61

## C5A. What concerns, if any, do you have about moving to IP technologies? (MULTI CODE)

Base : All ISDN users not using but aware of IP-based alternatives

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
Significance Level: 95%		a	b	*c	d	*e	f	*g	*h	*i	j	*k	l	*m	n	o	p	q
Unweighted total	99	53	46	-	34	21	35	24	-	-	76	23	64	12	51	48	36	61
Effective Weighted Sample	72	34	44	-	21	15	33	24	-	-	59	13	51	8	40	32	24	55
Total	95	55	40	-	35	21	30	21	-	-	74	21	63	11	51	44	42	51
		58%	42%	-%	37%	22%	31%	23%	-%	-%	78%	22%	66%	12%	54%	46%	45%	54%
Happy with current system	11	7	3	-	4	4	3	4	-	-	8	2	8	-	8	2	3	7
	11%	13%	8%	-%	12%	18%	9%	20%	-%	-%	11%	11%	13%	-%	16%	5%	8%	14%
		68%	32%	-%	40%	35%	26%	41%	-%	-%	79%	21%	79%	-%	77%	23%	32%	68%
Immaturity of commercial offerings	10	6	4	-	1	5	2	5	-	-	9	1	7	2	9	1	3	8
	11%	11%	11%	-%	2%	24%	6%	24%	-%	-%	12%	5%	11%	19%	18%	2%	6%	15%
		57%	43%	-%	8%	49%	17%	51%	-%	-%	90%	10%	69%	21%	92%	8%	25%	75%
Not available in my area	2	*	2	-	*	-	-	2	-	-	2	*	1	1	1	1	-	2
	3%	1%	5%	-%	1%	-%	-%	9%	-%	-%	3%	2%	2%	9%	3%	2%	-%	5%
		17%	83%	-%	17%	-%	-%	83%	-%	-%	83%	17%	42%	41%	59%	41%	-%	100%
Don't know enough about it	1	1	-	-	1	-	1	-	-	-	1	-	*	1	1	*	*	1
	1%	2%	-%	-%	3%	-%	3%	-%	-%	-%	2%	-%	1%	7%	2%	1%	1%	2%
		100%	-%	-%	100%	-%	65%	-%	-%	-%	100%	-%	35%	65%	65%	35%	35%	65%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 61**

## **C5A. What concerns, if any, do you have about moving to IP technologies? (MULTI CODE)**

Base : All ISDN users not using but aware of IP-based alternatives

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%		*a	b	*c	d	*e	f	*g	h	*i	j	*k	*l	*m	*n	*o	*p	*q	*r
Unweighted total	99	14	66	19	69	23	99	-	77	19	91	8	-	-	-	-	-	-	-
Effective Weighted Sample	72	9	54	12	51	15	72	-	57	17	66	7	-	-	-	-	-	-	-
Total	95	16	59	20	70	18	95	-	76	14	89	6	-	-	-	-	-	-	-
		17%	62%	21%	74%	19%	100%	-%	80%	15%	94%	6%	-%	-%	-%	-%	-%	-%	-%
Reliability	47	10	25	12	33	9	47	-	38	4	45	2	-	-	-	-	-	-	-
	49%	63%	42%	58%	47%	51%	49%	-%	50%	29%	51%	26%	-%	-%	-%	-%	-%	-%	-%
		22%	53%	25%	71%	20%	100%	-%	81%	9%	97%	3%	-%	-%	-%	-%	-%	-%	-%
Quality of service	40	4	25	12	30	7	40	-	30	5	40	-	-	-	-	-	-	-	-
	42%	23%	42%	59%	42%	39%	42%	-%	40%	37%	45%	-%	-%	-%	-%	-%	-%	-%	-%
		9%	61%	30%	74%	18%	100%	-%	75%	13%	100%	-%	-%	-%	-%	-%	-%	-%	-%
Price	39	5	21	12	27	9	39	-	31	6	36	3	-	-	-	-	-	-	-
	41%	33%	36%	62%	38%	47%	41%	-%	41%	43%	40%	53%	-%	-%	-%	-%	-%	-%	-%
		14%	54%	32%	69%	22%	100%	-%	81%	16%	92%	8%	-%	-%	-%	-%	-%	-%	-%
Resilience	30	3	23	4	22	7	30	-	22	4	28	2	-	-	-	-	-	-	-
	31%	17%	39%	22%	32%	40%	31%	-%	29%	31%	32%	26%	-%	-%	-%	-%	-%	-%	-%
		9%	76%	15%	76%	24%	100%	-%	75%	15%	95%	5%	-%	-%	-%	-%	-%	-%	-%
Security	29	4	14	12	17	10	29	-	20	6	27	3	-	-	-	-	-	-	-
	31%	23%	23%	60%	24%	53%	31%	-%	27%	41%	30%	43%	-%	-%	-%	-%	-%	-%	-%
		13%	46%	41%	57%	33%	100%	-%	68%	20%	91%	9%	-%	-%	-%	-%	-%	-%	-%
Cost of investment needed	20	1	14	5	16	3	20	-	16	4	18	1	-	-	-	-	-	-	-
	21%	5%	23%	27%	23%	19%	21%	-%	21%	28%	21%	24%	-%	-%	-%	-%	-%	-%	-%
		4%	69%	27%	83%	17%	100%	-%	80%	20%	93%	7%	-%	-%	-%	-%	-%	-%	-%
Lack of commercial offerings	20	3	11	6	14	5	20	-	14	2	19	1	-	-	-	-	-	-	-
	21%	16%	19%	29%	20%	28%	21%	-%	18%	17%	21%	13%	-%	-%	-%	-%	-%	-%	-%
		13%	57%	29%	74%	26%	100%	-%	72%	12%	96%	4%	-%	-%	-%	-%	-%	-%	-%
Unable to meet business needs	16	1	12	3	13	3	16	-	12	3	16	-	-	-	-	-	-	-	-
	17%	9%	20%	13%	18%	17%	17%	-%	16%	24%	18%	-%	-%	-%	-%	-%	-%	-%	-%
		9%	74%	16%	81%	19%	100%	-%	78%	22%	100%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 61

## C5A. What concerns, if any, do you have about moving to IP technologies? (MULTI CODE)

Base : All ISDN users not using but aware of IP-based alternatives

	SWITCHING ISDN SUPPLIER				CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%		*a	b	*c	d	*e	f	*g	h	*i	j	*k	*l	*m	*n	*o	*p	*q	*r
Unweighted total	99	14	66	19	69	23	99	-	77	19	91	8	-	-	-	-	-	-	-
Effective Weighted Sample	72	9	54	12	51	15	72	-	57	17	66	7	-	-	-	-	-	-	-
Total	95	16	59	20	70	18	95	-	76	14	89	6	-	-	-	-	-	-	-
		17%	62%	21%	74%	19%	100%	-%	80%	15%	94%	6%	-%	-%	-%	-%	-%	-%	-%
Happy with current system	11	2	6	3	9	1	11	-	9	2	11	-	-	-	-	-	-	-	-
	11%	12%	10%	13%	13%	5%	11%	-%	11%	11%	12%	-%	-%	-%	-%	-%	-%	-%	-%
		18%	57%	25%	88%	8%	100%	-%	81%	15%	100%	-%	-%	-%	-%	-%	-%	-%	-%
Immaturity of commercial offerings	10	2	8	*	10	-	10	-	8	2	10	-	-	-	-	-	-	-	-
	11%	11%	14%	2%	15%	-%	11%	-%	11%	13%	11%	-%	-%	-%	-%	-%	-%	-%	-%
		18%	78%	4%	100%	-%	100%	-%	78%	18%	100%	-%	-%	-%	-%	-%	-%	-%	-%
Not available in my area	2	1	1	-	1	1	2	-	*	2	2	*	-	-	-	-	-	-	-
	3%	6%	2%	-%	1%	8%	3%	-%	1%	14%	2%	7%	-%	-%	-%	-%	-%	-%	-%
		42%	58%	-%	42%	58%	100%	-%	17%	83%	83%	17%	-%	-%	-%	-%	-%	-%	-%
Don't know enough about it	1	-	1	*	1	-	1	-	1	-	1	*	-	-	-	-	-	-	-
	1%	-%	1%	2%	2%	-%	1%	-%	2%	-%	1%	7%	-%	-%	-%	-%	-%	-%	-%
		-%	65%	35%	100%	-%	100%	-%	100%	-%	65%	35%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 62**

## **C5B. And which of these would be your main concern? (SINGLE CODE)**

Base : All ISDN users not using but aware of IP-based alternatives

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											
	Total	UNDER			OVER				ISDN2	ISDN30 ONLY	ISDN2 ONLY	ISDN30 BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP SWITCHED		IP NOT SWITCHED	ANY IP
		1-49	50-249	250+	£1M	£1M-£20M	£21M-£100M	£100M									ISDN	ISDN		
		*a	*b	c	*d	e	*f	*g	h	i	j	k	*l	*m	*n	*o	*p	*q	*r	*s
Significance Level: 95%																				
Unweighted total	99	21	19	58	16	34	28	18	55	59	40	44	15	-	-	-	-	-	-	-
Effective Weighted Sample	72	16	19	54	11	25	24	16	35	57	24	42	15	-	-	-	-	-	-	-
Total	95	33	24	38	18	35	24	13	56	51	44	38	13	-	-	-	-	-	-	-
		35%	25%	40%	19%	37%	25%	14%	60%	54%	46%	40%	13%	-%	-%	-%	-%	-%	-%	-%
Reliability	29	13	8	8	6	11	7	2	22	9	20	7	2	-	-	-	-	-	-	-
	31%	38%	35%	21%	33%	31%	28%	18%	39%	17%	46%	18%	14%	-%	-%	-%	-%	-%	-%	-%
									ik		ik									
		43%	29%	28%	21%	37%	23%	8%	76%	30%	70%	24%	6%	-%	-%	-%	-%	-%	-%	-%
Quality of service	17	5	3	9	4	4	7	3	11	13	4	6	7	-	-	-	-	-	-	-
	18%	14%	15%	24%	20%	10%	28%	25%	19%	26%	9%	17%	53%	-%	-%	-%	-%	-%	-%	-%
		26%	20%	53%	21%	22%	39%	18%	63%	76%	24%	37%	39%	-%	-%	-%	-%	-%	-%	-%
Resilience	16	5	7	4	2	8	4	1	6	9	6	9	-	-	-	-	-	-	-	-
	17%	16%	29%	9%	11%	23%	16%	6%	11%	18%	14%	24%	-%	-%	-%	-%	-%	-%	-%	-%
		33%	44%	23%	13%	53%	24%	5%	40%	60%	40%	60%	-%	-%	-%	-%	-%	-%	-%	-%
Price	14	7	2	5	5	4	2	2	9	7	7	5	2	-	-	-	-	-	-	-
	15%	20%	10%	13%	27%	12%	9%	12%	15%	14%	15%	14%	14%	-%	-%	-%	-%	-%	-%	-%
		48%	18%	35%	35%	31%	16%	11%	62%	51%	49%	38%	13%	-%	-%	-%	-%	-%	-%	-%
Security	11	2	2	6	-	5	2	4	6	6	5	5	1	-	-	-	-	-	-	-
	12%	7%	10%	17%	-%	14%	8%	33%	11%	12%	12%	13%	6%	-%	-%	-%	-%	-%	-%	-%
		21%	21%	57%	-%	45%	18%	37%	54%	53%	47%	46%	7%	-%	-%	-%	-%	-%	-%	-%
Unable to meet business needs	3	-	-	3	1	2	*	-	1	2	*	2	1	-	-	-	-	-	-	-
	3%	-%	-%	7%	4%	4%	2%	-%	2%	5%	1%	4%	6%	-%	-%	-%	-%	-%	-%	-%
		-%	-%	100%	28%	57%	15%	-%	43%	85%	15%	57%	28%	-%	-%	-%	-%	-%	-%	-%
Cost of investment needed	2	1	-	1	-	1	*	1	*	2	*	2	-	-	-	-	-	-	-	-
	2%	3%	-%	3%	-%	3%	2%	6%	1%	3%	1%	5%	-%	-%	-%	-%	-%	-%	-%	-%
		45%	-%	55%	-%	45%	19%	36%	19%	81%	19%	81%	-%	-%	-%	-%	-%	-%	-%	-%
Don't know enough about it	1	-	-	1	-	*	1	-	1	1	*	-	1	-	-	-	-	-	-	-
	1%	-%	-%	3%	-%	1%	3%	-%	2%	2%	1%	-%	6%	-%	-%	-%	-%	-%	-%	-%
		-%	-%	100%	-%	35%	65%	-%	100%	65%	35%	-%	65%	-%	-%	-%	-%	-%	-%	-%
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																				

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 62

## C5B. And which of these would be your main concern? (SINGLE CODE)

Base : All ISDN users not using but aware of IP-based alternatives

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											IP SWITCHED	IP NOT SWITCHED	ANY IP
	Total	1-49	50-249	250+	UNDER £1M	£1M- £20M	£21M-£10 0M	OVER £100M	ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP					
Significance Level: 95%		*a	*b	c	*d	e	*f	*g	h	i	j	k	l	*m	*n	*o	*p	*q	*r	*s		
Unweighted total	99	21	19	58	16	34	28	18	55	59	40	44	15	-	-	-	-	-	-	-		
Effective Weighted Sample	72	16	19	54	11	25	24	16	35	57	24	42	15	-	-	-	-	-	-	-		
Total	95	33	24	38	18	35	24	13	56	51	44	38	13	-	-	-	-	-	-	-		
		35%	25%	40%	19%	37%	25%	14%	60%	54%	46%	40%	13%	-%	-%	-%	-%	-%	-%	-%		
Lack of commercial offerings	1	1	-	-	1	-	-	-	-	1	-	1	-	-	-	-	-	-	-	-		
	1%	3%	-%	-%	5%	-%	-%	-%	-%	2%	-%	3%	-%	-%	-%	-%	-%	-%	-%	-%		
		100%	-%	-%	100%	-%	-%	-%	-%	100%	-%	100%	-%	-%	-%	-%	-%	-%	-%	-%		
Immaturity of commercial offerings	1	-	-	1	-	-	1	-	-	1	-	1	-	-	-	-	-	-	-	-		
	1%	-%	-%	2%	-%	-%	3%	-%	-%	2%	-%	2%	-%	-%	-%	-%	-%	-%	-%	-%		
		-%	-%	100%	-%	-%	100%	-%	-%	100%	-%	100%	-%	-%	-%	-%	-%	-%	-%	-%		

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 62**

**C5B. And which of these would be your main concern? (SINGLE CODE)**

Base : All ISDN users not using but aware of IP-based alternatives

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN30			ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		ISDN2	ISDN30	IP														
Significance Level: 95%		a	b	*c	d	*e	f	*g	*h	*i	j	*k	l	*m	n	o	p	q
Unweighted total	99	53	46	-	34	21	35	24	-	-	76	23	64	12	51	48	36	61
Effective Weighted Sample	72	34	44	-	21	15	33	24	-	-	59	13	51	8	40	32	24	55
Total	95	55	40	-	35	21	30	21	-	-	74	21	63	11	51	44	42	51
		58%	42%	-%	37%	22%	31%	23%	-%	-%	78%	22%	66%	12%	54%	46%	45%	54%
Reliability	29	22	7	-	14	8	5	4	-	-	22	7	18	4	19	10	16	12
	31%	40%	17%	-%	39%	39%	17%	18%	-%	-%	30%	34%	29%	33%	37%	23%	37%	24%
		b																
		76%	24%	-%	48%	28%	17%	13%	-%	-%	76%	24%	62%	13%	65%	35%	54%	42%
Quality of service	17	10	7	-	8	3	8	5	-	-	15	2	15	-	12	5	6	11
	18%	18%	18%	-%	22%	13%	27%	23%	-%	-%	20%	11%	24%	-%	23%	12%	15%	21%
		58%	42%	-%	46%	16%	47%	29%	-%	-%	87%	13%	87%	-%	69%	31%	37%	63%
Resilience	16	6	9	-	2	5	4	6	-	-	14	2	11	3	5	11	9	7
	17%	12%	24%	-%	5%	21%	13%	26%	-%	-%	18%	10%	17%	27%	10%	24%	20%	14%
		40%	60%	-%	12%	29%	24%	36%	-%	-%	87%	13%	67%	20%	33%	67%	55%	45%
Price	14	9	5	-	6	3	4	3	-	-	10	4	7	2	4	10	8	5
	15%	16%	13%	-%	17%	12%	14%	13%	-%	-%	13%	21%	12%	19%	7%	23%	19%	11%
		62%	38%	-%	43%	19%	31%	20%	-%	-%	69%	31%	53%	16%	27%	73%	58%	39%
Security	11	6	5	-	4	2	4	2	-	-	8	4	8	-	7	4	2	9
	12%	11%	13%	-%	11%	11%	14%	8%	-%	-%	10%	18%	12%	-%	13%	10%	4%	19%
		54%	46%	-%	34%	20%	37%	16%	-%	-%	68%	32%	68%	-%	60%	40%	16%	84%
Unable to meet business needs	3	*	2	-	*	1	1	2	-	-	3	-	2	1	2	1	*	2
	3%	1%	6%	-%	1%	4%	3%	7%	-%	-%	4%	-%	3%	7%	3%	3%	1%	5%
		15%	85%	-%	15%	28%	28%	57%	-%	-%	100%	-%	72%	28%	57%	43%	15%	85%
Cost of investment needed	2	*	2	-	*	-	2	-	-	-	1	1	1	-	*	2	-	2
	2%	1%	4%	-%	1%	-%	6%	-%	-%	-%	1%	7%	1%	-%	1%	4%	-%	4%
		19%	81%	-%	19%	-%	81%	-%	-%	-%	36%	64%	36%	-%	19%	81%	-%	100%
Don't know enough about it	1	1	-	-	1	-	1	-	-	-	1	-	*	1	1	*	*	1
	1%	2%	-%	-%	3%	-%	3%	-%	-%	-%	2%	-%	1%	7%	2%	1%	1%	2%
		100%	-%	-%	100%	-%	65%	-%	-%	-%	100%	-%	35%	65%	65%	35%	35%	65%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 62

C5B. And which of these would be your main concern? (SINGLE CODE)

Base : All ISDN users not using but aware of IP-based alternatives

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	b	*c	d	*e	f	*g	*h	*i	j	*k	l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	99	53	46	-	34	21	35	24	-	-	76	23	64	12	51	48	36	61
Effective Weighted Sample	72	34	44	-	21	15	33	24	-	-	59	13	51	8	40	32	24	55
Total	95	55	40	-	35	21	30	21	-	-	74	21	63	11	51	44	42	51
		58%	42%	-%	37%	22%	31%	23%	-%	-%	78%	22%	66%	12%	54%	46%	45%	54%
Lack of commercial offerings	1	-	1	-	-	-	1	-	-	-	1	-	1	-	1	-	1	-
	1%	-%	2%	-%	-%	-%	3%	-%	-%	-%	1%	-%	2%	-%	2%	-%	2%	-%
		-%	100%	-%	-%	-%	100%	-%	-%	-%	100%	-%	100%	-%	100%	-%	100%	-%
Immaturity of commercial offerings	1	-	1	-	-	-	-	1	-	-	1	-	-	1	1	-	-	1
	1%	-%	2%	-%	-%	-%	-%	4%	-%	-%	1%	-%	-%	7%	2%	-%	-%	2%
		-%	100%	-%	-%	-%	-%	100%	-%	-%	100%	-%	-%	100%	100%	-%	-%	100%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 62**

**C5B. And which of these would be your main concern? (SINGLE CODE)**

Base : All ISDN users not using but aware of IP-based alternatives

		SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
		Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%		*a	b	*c	d	*e	f	*g	h	*i	j	*k	*l	*m	*n	*o	*p	*q	*r	
Unweighted total	99	14	66	19	69	23	99	-	77	19	91	8	-	-	-	-	-	-	-	
Effective Weighted Sample	72	9	54	12	51	15	72	-	57	17	66	7	-	-	-	-	-	-	-	
Total	95	16	59	20	70	18	95	-	76	14	89	6	-	-	-	-	-	-	-	
		17%	62%	21%	74%	19%	100%	-%	80%	15%	94%	6%	-%	-%	-%	-%	-%	-%	-%	
Reliability	29	9	15	4	21	6	29	-	25	1	28	1	-	-	-	-	-	-	-	
	31%	56%	26%	22%	30%	33%	31%	-%	33%	8%	32%	13%	-%	-%	-%	-%	-%	-%	-%	
		32%	53%	15%	73%	21%	100%	-%	85%	4%	97%	3%	-%	-%	-%	-%	-%	-%	-%	
Quality of service	17	4	13	-	16	1	17	-	14	3	17	-	-	-	-	-	-	-	-	
	18%	23%	23%	-%	22%	4%	18%	-%	19%	20%	19%	-%	-%	-%	-%	-%	-%	-%	-%	
		22%	78%	-%	91%	5%	100%	-%	83%	17%	100%	-%	-%	-%	-%	-%	-%	-%	-%	
Resilience	16	1	14	1	13	3	16	-	13	3	14	2	-	-	-	-	-	-	-	
	17%	5%	24%	4%	18%	16%	17%	-%	17%	21%	16%	26%	-%	-%	-%	-%	-%	-%	-%	
		5%	90%	5%	82%	18%	100%	-%	81%	19%	90%	10%	-%	-%	-%	-%	-%	-%	-%	
Price	14	*	4	9	6	6	14	-	9	4	13	1	-	-	-	-	-	-	-	
	15%	3%	7%	45%	9%	33%	15%	-%	11%	26%	15%	13%	-%	-%	-%	-%	-%	-%	-%	
		3%	31%	66%	47%	43%	100%	-%	63%	27%	94%	6%	-%	-%	-%	-%	-%	-%	-%	
Security	11	1	6	4	8	1	11	-	10	1	10	1	-	-	-	-	-	-	-	
	12%	5%	10%	22%	11%	7%	12%	-%	13%	8%	12%	17%	-%	-%	-%	-%	-%	-%	-%	
		7%	54%	39%	69%	11%	100%	-%	86%	11%	91%	9%	-%	-%	-%	-%	-%	-%	-%	
Unable to meet business needs	3	*	2	-	3	-	3	-	2	*	3	-	-	-	-	-	-	-	-	
	3%	3%	4%	-%	4%	-%	3%	-%	3%	3%	3%	-%	-%	-%	-%	-%	-%	-%	-%	
		15%	85%	-%	100%	-%	100%	-%	85%	15%	100%	-%	-%	-%	-%	-%	-%	-%	-%	
Cost of investment needed	2	-	1	1	1	1	2	-	1	1	1	1	-	-	-	-	-	-	-	
	2%	-%	2%	5%	1%	8%	2%	-%	2%	7%	1%	24%	-%	-%	-%	-%	-%	-%	-%	
		-%	55%	45%	36%	64%	100%	-%	55%	45%	36%	64%	-%	-%	-%	-%	-%	-%	-%	
Don't know enough about it	1	-	1	*	1	-	1	-	1	-	1	*	-	-	-	-	-	-	-	
	1%	-%	1%	2%	2%	-%	1%	-%	2%	-%	1%	7%	-%	-%	-%	-%	-%	-%	-%	
		-%	65%	35%	100%	-%	100%	-%	100%	-%	65%	35%	-%	-%	-%	-%	-%	-%	-%	

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r



# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 62

C5B. And which of these would be your main concern? (SINGLE CODE)

Base : All ISDN users not using but aware of IP-based alternatives

	SWITCHING ISDN SUPPLIER				CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%		*a	b	*c	d	*e	f	*g	h	*i	j	*k	*l	*m	*n	*o	*p	*q	*r
Unweighted total	99	14	66	19	69	23	99	-	77	19	91	8	-	-	-	-	-	-	-
Effective Weighted Sample	72	9	54	12	51	15	72	-	57	17	66	7	-	-	-	-	-	-	-
Total	95	16	59	20	70	18	95	-	76	14	89	6	-	-	-	-	-	-	-
		17%	62%	21%	74%	19%	100%	-%	80%	15%	94%	6%	-%	-%	-%	-%	-%	-%	-%
Lack of commercial offerings	1	1	-	-	1	-	1	-	1	-	1	-	-	-	-	-	-	-	-
	1%	6%	-%	-%	1%	-%	1%	-%	1%	-%	1%	-%	-%	-%	-%	-%	-%	-%	-%
		100%	-%	-%	100%	-%	100%	-%	100%	-%	100%	-%	-%	-%	-%	-%	-%	-%	-%
Immaturity of commercial offerings	1	-	1	-	1	-	1	-	-	1	1	-	-	-	-	-	-	-	-
	1%	-%	1%	-%	1%	-%	1%	-%	-%	6%	1%	-%	-%	-%	-%	-%	-%	-%	-%
		-%	100%	-%	100%	-%	100%	-%	-%	100%	100%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 63**

## **C6. When did you last consider making changes to your (ISDN2/2e/ ISDN30)? (SINGLE CODE)**

Base : Those who use ISN2/2e or ISDN30 and do not use IP-based alternatives

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											
	Total	1-49 a	50-249 *b	250+ c	UNDER				ISDN2 h	ISDN30 i	ISDN2 ONLY j	ISDN30 ONLY k	BOTH ISDN *l	IP NOT ISDN *m	ISDN2 & IP *n	ISDN30 & IP *o	ISDN & IP *p	IP SWITCHED	IP NOT SWITCHED	ANY IP *s
					£1M *d	£1M- £20M e	£21M-£100M f	OVER £100M *g										ISDN	ISDN	
Significance Level: 95%																				
Unweighted total	132	34	27	70	23	47	38	21	74	76	56	58	18	-	-	-	-	-	-	-
Effective Weighted Sample	96	27	26	65	16	35	33	18	48	73	35	56	18	-	-	-	-	-	-	-
Total	134	55	33	46	31	51	32	15	82	67	67	52	15	-	-	-	-	-	-	-
		41%	25%	34%	23%	38%	24%	11%	61%	50%	50%	39%	11%	-%	-%	-%	-%	-%	-%	-%
Within the last year	25	9	8	7	6	9	7	3	20	10	15	4	5	-	-	-	-	-	-	-
	18%	17%	24%	16%	18%	18%	20%	21%	k	25%	14%	22%	8%	35%	-%	-%	-%	-%	-%	-%
		38%	33%	29%	23%	38%	27%	13%	82%	39%	61%	18%	21%	-%	-%	-%	-%	-%	-%	-%
1 -3 years ago	61	18	22	21	11	25	17	8	34	33	27	27	7	-	-	-	-	-	-	-
	45%	33%	66%	46%	37%	49%	53%	50%	41%	50%	41%	52%	43%	-%	-%	-%	-%	-%	-%	-%
		30%	36%	34%	19%	41%	28%	12%	56%	55%	45%	44%	11%	-%	-%	-%	-%	-%	-%	-%
More than 3 years ago	26	14	2	10	8	9	5	1	15	13	13	11	2	-	-	-	-	-	-	-
	20%	26%	7%	21%	27%	17%	15%	5%	19%	20%	19%	21%	16%	-%	-%	-%	-%	-%	-%	-%
		54%	9%	37%	31%	33%	18%	3%	58%	51%	49%	42%	9%	-%	-%	-%	-%	-%	-%	-%
I have not considered changes	19	12	1	6	5	7	3	3	12	8	11	7	1	-	-	-	-	-	-	-
	14%	22%	3%	12%	15%	14%	10%	21%	14%	12%	16%	14%	7%	-%	-%	-%	-%	-%	-%	-%
		65%	5%	30%	24%	38%	16%	17%	62%	43%	57%	38%	5%	-%	-%	-%	-%	-%	-%	-%
Don't know/ Can't remember	4	1	-	2	1	1	1	*	1	3	1	3	-	-	-	-	-	-	-	-
	3%	2%	-%	5%	4%	2%	2%	3%	1%	4%	1%	5%	-%	-%	-%	-%	-%	-%	-%	-%
		32%	-%	68%	32%	34%	22%	12%	24%	76%	24%	76%	-%	-%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 63

## C6. When did you last consider making changes to your (ISDN2/2e/ ISDN30)? (SINGLE CODE)

Base : Those who use ISN2/2e or ISDN30 and do not use IP-based alternatives

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	b	*c	d	e	f	g	*h	*i	j	k	l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	132	71	61	-	43	31	44	32	-	-	88	44	69	19	62	70	52	73
Effective Weighted Sample	96	46	59	-	26	22	42	31	-	-	67	29	55	13	48	48	35	65
Total	134	79	54	-	46	36	38	29	-	-	88	46	66	22	64	69	65	63
		59%	41%	-%	34%	27%	29%	22%	-%	-%	66%	34%	50%	16%	48%	52%	49%	47%
Within the last year	25	20	4	-	10	11	8	2	-	-	17	7	13	4	12	12	13	12
	18%	25%	8%	-%	21%	29%	21%	6%	-%	-%	20%	16%	19%	20%	19%	18%	19%	19%
		b				g												
		82%	18%	-%	39%	43%	32%	7%	-%	-%	70%	30%	52%	18%	50%	50%	52%	48%
1 -3 years ago	61	32	28	-	24	9	15	18	-	-	47	14	40	7	31	29	25	33
	45%	40%	52%	-%	53%	26%	40%	62%	-%	-%	53%	30%	60%	33%	48%	42%	38%	53%
						e					k							
		53%	47%	-%	40%	15%	25%	30%	-%	-%	77%	23%	66%	12%	52%	48%	41%	55%
More than 3 years ago	26	15	12	-	5	10	7	7	-	-	15	11	11	5	13	13	16	9
	20%	18%	22%	-%	11%	28%	18%	22%	-%	-%	17%	24%	16%	22%	20%	19%	25%	14%
		55%	45%	-%	19%	39%	26%	25%	-%	-%	58%	42%	40%	18%	50%	50%	62%	33%
I have not considered changes	19	12	7	-	6	6	5	3	-	-	7	11	3	5	7	12	11	7
	14%	15%	13%	-%	14%	15%	14%	9%	-%	-%	8%	25%	4%	21%	11%	17%	17%	12%
											j							
		62%	38%	-%	33%	30%	29%	14%	-%	-%	39%	61%	15%	24%	38%	62%	58%	39%
Don't know/ Can't remember	4	1	3	-	*	*	3	-	-	-	1	2	*	1	1	3	*	2
	3%	1%	5%	-%	1%	1%	7%	-%	-%	-%	1%	5%	1%	4%	1%	4%	1%	3%
		24%	76%	-%	12%	12%	76%	-%	-%	-%	34%	66%	12%	22%	22%	78%	12%	45%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 63**

## **C6. When did you last consider making changes to your (ISDN2/2e/ ISDN30)? (SINGLE CODE)**

Base : Those who use ISN2/2e or ISDN30 and do not use IP-based alternatives

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
	NEVER			YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
	LAST YEAR	EVER	/DK															
Significance Level: 95%	*a	b	c	d	e	f	g	h	i	j	*k	*l	*m	*n	*o	*p	*q	*r
Unweighted total	132	15	80	37	75	40	99	33	93	31	110	22	-	-	-	-	-	-
Effective Weighted Sample	96	10	66	24	56	26	72	25	69	24	81	15	-	-	-	-	-	-
Total	134	18	74	42	77	39	95	39	94	28	111	22	-	-	-	-	-	-
	13%	55%	32%	57%	29%	71%	29%	70%	21%	83%	17%	-%	-%	-%	-%	-%	-%	-%
Within the last year	25	4	16	5	22	3	21	4	20	4	25	-	-	-	-	-	-	-
	18%	23%	21%	11%	29%	7%	22%	9%	21%	14%	22%	-%	-%	-%	-%	-%	-%	-%
		17%	64%	19%	e 89%	11%	85%	15%	82%	16%	100%	-%	-%	-%	-%	-%	-%	-%
1 -3 years ago	61	8	40	13	39	13	52	9	45	11	61	-	-	-	-	-	-	-
	45%	45%	54%	30%	51%	34%	54%	23%	48%	39%	54%	-%	-%	-%	-%	-%	-%	-%
		13%	c 66%	21%	65%	22%	g 85%	15%	74%	18%	100%	-%	-%	-%	-%	-%	-%	-%
More than 3 years ago	26	5	13	8	13	12	16	10	19	7	26	-	-	-	-	-	-	-
	20%	28%	18%	19%	17%	30%	17%	26%	20%	27%	24%	-%	-%	-%	-%	-%	-%	-%
		19%	51%	30%	51%	44%	62%	38%	72%	28%	100%	-%	-%	-%	-%	-%	-%	-%
I have not considered changes	19	1	4	14	1	10	5	14	8	6	-	19	-	-	-	-	-	-
	14%	4%	5%	34%	1%	26%	5%	36%	8%	20%	-%	84%	-%	-%	-%	-%	-%	-%
		4%	b 19%	76%	4%	d 53%	25%	f 75%	40%	30%	-%	100%	-%	-%	-%	-%	-%	-%
Don't know/ Can't remember	4	-	1	3	1	1	1	2	2	-	-	4	-	-	-	-	-	-
	3%	-%	1%	6%	2%	3%	1%	6%	2%	-%	-%	16%	-%	-%	-%	-%	-%	-%
		-%	22%	78%	34%	32%	34%	66%	56%	-%	-%	100%	-%	-%	-%	-%	-%	-%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 64**

## **D1. What type of IP services do you use? (MULTI CODE)**

Base : Those who use IP-based alternatives

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											ANY IP
	Total	1-49	50-249	250+	UNDER £1M	£1M- £20M	£21M-£10 0M	OVER £100M	ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP SWITCHED ISDN	IP NOT SWITCHED ISDN	
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	*k	l	m	n	o	p	q	*r	s
Unweighted total	218	38	57	122	30	62	57	62	91	85	33	27	58	100	91	85	118	67	16	218
Effective Weighted Sample	197	36	56	115	27	58	53	58	75	84	20	27	57	97	75	84	102	58	14	197
Total	216	51	68	97	38	67	51	52	74	74	25	25	49	116	74	74	100	61	13	216
		24%	32%	45%	18%	31%	24%	24%	34%	34%	12%	12%	23%	54%	34%	34%	46%	28%	6%	100%
Hosted VOIP	151	33	46	72	29	42	41	35	50	55	13	18	37	83	50	55	68	41	8	151
	70%	64%	68%	75%	76%	62%	80%	67%	67%	74%	50%	71%	75%	72%	67%	74%	68%	68%	65%	70%
							e			j			j			j				
		22%	30%	48%	19%	28%	27%	23%	33%	36%	8%	12%	24%	55%	33%	36%	45%	27%	6%	100%
IP Centrex	85	12	26	47	10	23	22	28	39	39	12	11	27	35	39	39	50	33	5	85
	39%	24%	38%	48%	27%	34%	43%	54%	52%	52%	46%	45%	56%	30%	52%	52%	50%	54%	40%	39%
				a				de	m	m		ms			m	m	m	m		
		14%	31%	55%	12%	27%	26%	33%	46%	45%	14%	13%	32%	41%	46%	45%	59%	38%	6%	100%
SIP trunking	84	14	29	41	8	22	26	27	42	40	11	10	30	33	42	40	51	37	3	84
	39%	28%	43%	42%	22%	33%	52%	53%	56%	54%	45%	37%	62%	28%	56%	54%	52%	61%	22%	39%
							de	de	ms	ms			ms		ms	ms	ms	ms		
		17%	35%	48%	10%	26%	31%	32%	50%	47%	14%	11%	36%	39%	50%	47%	61%	44%	3%	100%
Don't Know	9	1	3	4	-	4	1	2	4	4	1	1	4	4	4	4	5	2	*	9
	4%	2%	5%	4%	-%	6%	2%	4%	6%	6%	3%	3%	7%	3%	6%	6%	5%	3%	3%	4%
		14%	38%	48%	-%	49%	14%	23%	51%	50%	9%	9%	41%	40%	51%	50%	60%	21%	5%	100%

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 64

## D1. What type of IP services do you use? (MULTI CODE)

Base : Those who use IP-based alternatives

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	b	c	d	*e	f	*g	h	i	j	*k	l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	218	52	33	133	45	22	39	22	154	64	72	13	71	1	88	130	87	120
Effective Weighted Sample	197	41	32	125	40	16	38	22	141	57	61	12	60	1	80	118	79	110
Total	216	44	31	141	37	21	35	20	158	58	65	10	64	1	95	121	97	108
		20%	14%	65%	17%	10%	16%	9%	73%	27%	30%	5%	30%	*%	44%	56%	45%	50%
Hosted VOIP	151	24	25	102	25	10	28	14	112	39	44	6	43	1	66	85	74	74
	70%	55%	82%	72%	69%	51%	81%	69%	71%	66%	67%	60%	67%	100%	69%	71%	76%	69%
		16%	17%	67%	17%	7%	19%	9%	74%	26%	29%	4%	28%	1%	44%	56%	49%	49%
IP Centrex	85	24	14	47	21	9	17	10	62	23	33	5	32	1	39	46	28	56
	39%	54%	45%	34%	56%	45%	48%	53%	39%	40%	51%	48%	50%	100%	41%	38%	29%	52%
		c															p	
		28%	16%	56%	24%	11%	20%	12%	73%	27%	39%	6%	38%	1%	46%	54%	32%	66%
SIP trunking	84	26	14	44	19	13	19	11	66	18	39	1	39	-	40	45	24	57
	39%	59%	45%	32%	53%	65%	54%	57%	42%	31%	60%	8%	61%	-%	41%	37%	25%	53%
		c			i		i										p	
		31%	17%	53%	23%	16%	22%	13%	79%	21%	46%	1%	46%	-%	47%	53%	29%	67%
Don't Know	9	3	1	5	3	1	1	2	6	3	1	2	1	-	2	7	4	2
	4%	6%	3%	4%	7%	5%	2%	11%	4%	5%	2%	22%	2%	-%	2%	6%	4%	1%
		30%	12%	58%	30%	12%	9%	23%	66%	34%	16%	25%	16%	-%	21%	79%	47%	18%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 64

## D1. What type of IP services do you use? (MULTI CODE)

Base : Those who use IP-based alternatives

	SWITCHING ISDN SUPPLIER				CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
	Total	NEVER			YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
		LAST YEAR	EVER	/DK															
Significance Level: 95%		*a	b	*c	d	*e	*f	*g	h	*i	*j	*k	l	m	n	o	p	q	r
Unweighted total	218	19	48	18	63	15	-	-	63	20	-	-	88	155	92	82	127	156	62
Effective Weighted Sample	197	18	40	15	53	14	-	-	53	18	-	-	77	143	85	74	116	140	57
Total	216	15	45	14	55	14	-	-	57	17	-	-	84	151	85	88	121	153	63
		7%	21%	7%	25%	7%	-%	-%	26%	8%	-%	-%	39%	70%	39%	41%	56%	71%	29%
Hosted VOIP	151	12	29	8	38	10	-	-	40	9	-	-	53	151	49	62	88	109	42
	70%	78%	65%	58%	69%	68%	-%	-%	70%	52%	-%	-%	62%	100%	57%	70%	73%	71%	67%
		8%	19%	6%	25%	6%	-%	-%	27%	6%	-%	-%	35%	100%	32%	41%	58%	72%	28%
IP Centrex	85	10	22	5	30	5	-	-	30	8	-	-	33	49	85	37	47	63	22
	39%	67%	49%	36%	55%	35%	-%	-%	52%	48%	-%	-%	40%	32%	100%	41%	39%	41%	35%
		12%	26%	6%	35%	6%	-%	-%	35%	9%	-%	-%	39%	57%	100%	43%	56%	74%	26%
SIP trunking	84	13	24	3	34	4	-	-	34	6	-	-	84	53	33	33	51	71	13
	39%	83%	54%	19%	63%	30%	-%	-%	59%	36%	-%	-%	100%	35%	39%	38%	42%	47%	20%
		15%	29%	3%	41%	5%	-%	-%	40%	7%	-%	-%	mn	100%	62%	40%	60%	85%	15%
Don't Know	9	-	2	2	1	1	-	-	1	2	-	-	-	-	-	2	2	4	5
	4%	-%	4%	13%	2%	7%	-%	-%	2%	14%	-%	-%	-%	-%	-%	3%	2%	2%	8%
		-%	21%	21%	14%	12%	-%	-%	12%	25%	-%	-%	-%	-%	-%	26%	25%	43%	57%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 65**

## **D2. Which of the following business uses do you use IP-based services for? (MULTI CODE)**

Base : Those who use IP-based alternatives

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											IP		IP NOT		ANY
	Total	UNDER			£1M- £20M	£21M-£100M			ISDN2	ISDN30			ISDN2 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30		ISDN & IP	ISDN SWITCHED	ISDN SWITCHED			
		1-49	50-249	250+		£1M	£1M- £20M	£21M- £100M		£100M	ISDN30	ISDN30 ONLY					ONLY	ONLY				ONLY	ONLY	
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	*k	l	m	n	o	p	q	*r	s				
Unweighted total	218	38	57	122	30	62	57	62	91	85	33	27	58	100	91	85	118	67	16	218				
Effective Weighted Sample	197	36	56	115	27	58	53	58	75	84	20	27	57	97	75	84	102	58	14	197				
Total	216	51	68	97	38	67	51	52	74	74	25	25	49	116	74	74	100	61	13	216				
		24%	32%	45%	18%	31%	24%	24%	34%	34%	12%	12%	23%	54%	34%	34%	46%	28%	6%	100%				
Incoming calls	160	36	51	73	28	47	39	40	46	44	16	14	30	100	46	44	60	30	9	160				
	74%	70%	75%	76%	74%	70%	77%	77%	62%	60%	63%	56%	61%	86%	62%	60%	61%	49%	69%	74%				
													hijlnopqs							iopq				
		22%	32%	46%	17%	30%	25%	25%	29%	28%	10%	9%	19%	62%	29%	28%	38%	19%	6%	100%				
Outgoing calls	153	37	41	74	26	44	36	42	45	40	16	11	29	96	45	40	56	25	9	153				
	71%	73%	60%	77%	69%	65%	70%	81%	61%	54%	63%	43%	60%	83%	61%	54%	56%	42%	71%	71%				
				b					q				q	hijlnopqs	q					iopq				
		24%	27%	49%	17%	29%	23%	27%	30%	26%	10%	7%	19%	63%	30%	26%	37%	16%	6%	100%				
Internet services	131	24	38	69	22	34	39	34	48	47	14	13	34	70	48	47	61	34	6	131				
	61%	47%	56%	71%	58%	50%	77%	66%	65%	63%	55%	51%	70%	60%	65%	63%	61%	57%	45%	61%				
				ab			e																	
		18%	29%	53%	17%	26%	30%	26%	37%	36%	11%	10%	26%	54%	37%	36%	46%	26%	4%	100%				
Calls between different sites	119	16	39	63	16	37	31	33	45	41	18	13	27	60	45	41	58	29	9	119				
	55%	32%	57%	66%	43%	55%	62%	63%	61%	55%	70%	52%	56%	52%	61%	55%	59%	47%	69%	55%				
			a	a																				
		14%	33%	53%	14%	31%	26%	28%	38%	34%	15%	11%	23%	51%	38%	34%	49%	24%	8%	100%				
Data services	118	17	39	62	18	31	37	31	39	42	12	15	27	65	39	42	54	26	8	118				
	55%	34%	57%	64%	48%	47%	72%	60%	53%	57%	47%	58%	56%	56%	53%	57%	54%	43%	63%	55%				
			a	a			de																	
		15%	33%	52%	15%	26%	31%	26%	33%	36%	10%	12%	23%	55%	33%	36%	45%	22%	7%	100%				
Video conferencing	100	14	28	58	12	24	31	30	30	31	9	10	21	60	30	31	40	16	5	100				
	46%	27%	41%	60%	32%	36%	61%	58%	40%	42%	35%	39%	43%	52%	40%	42%	40%	27%	35%	46%				
				ab			de	de						q						q				
		14%	28%	58%	12%	24%	31%	30%	30%	31%	9%	10%	21%	60%	30%	31%	40%	16%	5%	100%				
Card payments	85	13	26	46	14	19	26	25	30	26	11	7	19	48	30	26	37	14	9	85				
	39%	25%	38%	48%	36%	29%	51%	49%	40%	35%	44%	29%	39%	41%	40%	35%	37%	23%	66%	39%				
			a	a			e	e	q					q	q					q				
		15%	31%	54%	16%	23%	30%	30%	35%	31%	13%	9%	22%	56%	35%	31%	44%	16%	10%	100%				
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																								



# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 65**

**D2. Which of the following business uses do you use IP-based services for? (MULTI CODE)**

Base : Those who use IP-based alternatives

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	IP SWITCHED	IP NOT SWITCHED	ANY IP	
					£1M	£1M-£20M	£21M-£100M	OVER £100M												
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	*k	l	m	n	o	p	q	*r	s
Unweighted total	218	38	57	122	30	62	57	62	91	85	33	27	58	100	91	85	118	67	16	218
Effective Weighted Sample	197	36	56	115	27	58	53	58	75	84	20	27	57	97	75	84	102	58	14	197
Total	216	51	68	97	38	67	51	52	74	74	25	25	49	116	74	74	100	61	13	216
		24%	32%	45%	18%	31%	24%	24%	34%	34%	12%	12%	23%	54%	34%	34%	46%	28%	6%	100%
Fax services	84	15	28	41	10	25	24	23	35	30	11	6	24	43	35	30	41	22	5	84
	39%	30%	41%	42%	26%	36%	47%	44%	47%	40%	44%	26%	48%	37%	47%	40%	41%	37%	41%	39%
		18%	33%	49%	12%	29%	29%	27%	41%	36%	13%	8%	28%	51%	41%	36%	49%	27%	6%	100%
Security/alarm systems	84	9	24	51	9	21	31	23	33	37	8	12	25	38	33	37	45	25	4	84
	39%	18%	35%	52%	23%	31%	61%	44%	45%	50%	33%	48%	51%	33%	45%	50%	46%	41%	31%	39%
				ab			de			m			m			m				
		11%	29%	60%	10%	25%	37%	27%	40%	44%	10%	15%	30%	46%	40%	44%	54%	30%	5%	100%
Don't know	3	1	-	2	-	-	1	1	2	2	*	-	2	1	2	2	2	1	-	3
	2%	2%	-%	2%	-%	-%	2%	2%	3%	2%	2%	-%	3%	1%	3%	2%	2%	1%	-%	2%
		39%	-%	61%	-%	-%	37%	24%	61%	49%	13%	-%	49%	39%	61%	49%	61%	24%	-%	100%
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																				

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 65

## D2. Which of the following business uses do you use IP-based services for? (MULTI CODE)

Base : Those who use IP-based alternatives

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	b	c	d	*e	f	*g	h	i	j	*k	l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	218	52	33	133	45	22	39	22	154	64	72	13	71	1	88	130	87	120
Effective Weighted Sample	197	41	32	125	40	16	38	22	141	57	61	12	60	1	80	118	79	110
Total	216	44	31	141	37	21	35	20	158	58	65	10	64	1	95	121	97	108
		20%	14%	65%	17%	10%	16%	9%	73%	27%	30%	5%	30%	*%	44%	56%	45%	50%
Incoming calls	160	23	15	121	22	9	20	8	126	34	36	3	36	-	68	92	74	78
	74%	53%	50%	86%	60%	42%	58%	39%	80%	59%	55%	28%	56%	-%	71%	76%	77%	72%
		15%	10%	ab	14%	5%	13%	5%	dfi	21%	23%	2%	23%	-%	43%	57%	46%	49%
Outgoing calls	153	27	8	118	24	7	13	10	120	33	32	3	31	1	59	93	74	70
	71%	60%	25%	84%	66%	34%	37%	51%	76%	57%	49%	28%	48%	100%	62%	77%	77%	64%
		b		ab	f				fi						n			
		17%	5%	77%	16%	5%	8%	7%	78%	22%	21%	2%	20%	1%	39%	61%	49%	46%
Internet services	131	22	18	91	20	13	21	10	101	31	36	4	36	-	50	82	57	68
	61%	50%	59%	65%	53%	63%	59%	51%	64%	52%	56%	38%	57%	-%	52%	68%	59%	63%
		17%	14%		15%	10%	16%	8%	77%	23%	28%	3%	28%	-%	38%	62%	44%	52%
Calls between different sites	119	26	12	81	22	10	19	5	85	34	36	2	35	1	51	68	52	63
	55%	59%	38%	58%	59%	46%	55%	26%	54%	58%	55%	20%	54%	100%	53%	56%	54%	58%
		22%	10%	b	18%	8%	16%	4%	71%	29%	30%	2%	29%	1%	43%	57%	44%	53%
Data services	118	16	18	84	13	11	19	8	90	29	30	4	30	-	45	73	50	63
	55%	37%	58%	60%	36%	53%	53%	41%	57%	49%	46%	44%	46%	-%	47%	61%	52%	59%
		14%	15%	a	11%	9%	16%	7%	d									
Video conferencing	100	12	9	79	14	2	11	6	77	22	20	1	20	-	37	63	42	54
	46%	27%	30%	56%	37%	12%	31%	29%	49%	38%	30%	12%	31%	-%	38%	52%	43%	50%
		12%	9%	ab	14%	2%	11%	6%	f									
Card payments	85	13	11	61	10	8	11	4	64	20	20	3	20	-	28	57	37	44
	39%	29%	35%	44%	28%	41%	32%	21%	41%	35%	32%	30%	32%	-%	29%	47%	39%	40%
		15%	13%		12%	10%	13%	5%							n			
Columns Tested:														-%	33%	67%	44%	51%

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 65

D2. Which of the following business uses do you use IP-based services for? (MULTI CODE)

Base : Those who use IP-based alternatives

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	b	c	d	*e	f	*g	h	i	j	*k	l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	218	52	33	133	45	22	39	22	154	64	72	13	71	1	88	130	87	120
Effective Weighted Sample	197	41	32	125	40	16	38	22	141	57	61	12	60	1	80	118	79	110
Total	216	44	31	141	37	21	35	20	158	58	65	10	64	1	95	121	97	108
		20%	14%	65%	17%	10%	16%	9%	73%	27%	30%	5%	30%	*%	44%	56%	45%	50%
Fax services	84	16	13	55	15	8	11	9	58	26	24	4	24	-	36	48	31	49
	39%	36%	42%	39%	42%	41%	33%	45%	37%	45%	37%	44%	38%	-%	37%	40%	32%	45%
		19%	15%	66%	18%	10%	14%	10%	68%	32%	29%	5%	29%	-%	42%	58%	37%	58%
Security/alarm systems	84	12	17	55	14	7	18	6	67	17	27	2	27	-	25	59	30	50
	39%	27%	55%	39%	38%	32%	52%	29%	42%	29%	42%	18%	42%	-%	26%	49%	31%	46%
		a			i										n		p	
		14%	20%	66%	17%	8%	22%	7%	80%	20%	32%	2%	32%	-%	30%	70%	36%	59%
Don't know	3	1	-	2	1	-	1	-	2	2	*	1	*	-	2	1	*	2
	2%	3%	-%	1%	3%	-%	2%	-%	1%	3%	1%	8%	1%	-%	2%	1%	*%	1%
		37%	-%	63%	37%	-%	24%	-%	51%	49%	13%	24%	13%	-%	63%	37%	13%	49%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 65**

## **D2. Which of the following business uses do you use IP-based services for? (MULTI CODE)**

Base : Those who use IP-based alternatives

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
	Total	NEVER			YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
		LAST YEAR	EVER	/DK															
Significance Level: 95%		*a	b	*c	d	*e	*f	*g	h	*i	*j	*k	l	m	n	o	p	q	r
Unweighted total	218	19	48	18	63	15	-	-	63	20	-	-	88	155	92	82	127	156	62
Effective Weighted Sample	197	18	40	15	53	14	-	-	53	18	-	-	77	143	85	74	116	140	57
Total	216	15	45	14	55	14	-	-	57	17	-	-	84	151	85	88	121	153	63
		7%	21%	7%	25%	7%	-%	-%	26%	8%	-%	-%	39%	70%	39%	41%	56%	71%	29%
Incoming calls	160	9	21	9	28	6	-	-	31	7	-	-	63	120	59	61	97	111	49
	74%	57%	47%	62%	51%	43%	-%	-%	54%	43%	-%	-%	75%	79%	69%	69%	80%	72%	78%
		5%	13%	6%	17%	4%	-%	-%	19%	5%	-%	-%	39%	75%	37%	38%	61%	69%	31%
Outgoing calls	153	12	13	9	23	7	-	-	25	9	-	-	62	112	59	58	92	104	48
	71%	76%	30%	64%	42%	50%	-%	-%	44%	55%	-%	-%	73%	74%	69%	65%	76%	68%	76%
		8%	9%	6%	15%	5%	-%	-%	17%	6%	-%	-%	41%	74%	39%	38%	60%	68%	32%
Internet services	131	8	27	6	33	6	-	-	33	7	-	-	55	101	54	45	84	100	31
	61%	51%	59%	40%	60%	39%	-%	-%	57%	42%	-%	-%	66%	67%	64%	52%	69%	66%	49%
		6%	20%	4%	25%	4%	-%	-%	25%	5%	-%	-%	42%	77%	41%	35%	64%	76%	24%
Calls between different sites	119	8	21	9	25	9	-	-	30	6	-	-	48	88	45	46	71	87	31
	55%	51%	46%	62%	46%	65%	-%	-%	53%	39%	-%	-%	57%	59%	53%	52%	58%	57%	50%
		7%	18%	8%	21%	8%	-%	-%	26%	5%	-%	-%	40%	74%	38%	38%	59%	74%	26%
Data services	118	4	21	8	23	7	-	-	27	6	-	-	50	94	48	48	68	89	30
	55%	28%	47%	57%	43%	50%	-%	-%	48%	36%	-%	-%	59%	62%	57%	54%	56%	58%	47%
		4%	18%	7%	20%	6%	-%	-%	23%	5%	-%	-%	42%	80%	41%	40%	57%	75%	25%
Video conferencing	100	3	13	5	12	7	-	-	17	4	-	-	38	75	43	28	68	70	30
	46%	21%	29%	32%	22%	46%	-%	-%	30%	23%	-%	-%	45%	50%	50%	32%	56%	46%	48%
		3%	13%	5%	12%	7%	-%	-%	17%	4%	-%	-%	38%	75%	43%	28%	68%	70%	30%
Card payments	85	3	11	10	14	6	-	-	17	6	-	-	33	63	45	31	52	61	23
	39%	18%	24%	66%	26%	43%	-%	-%	30%	34%	-%	-%	40%	42%	53%	35%	43%	40%	37%
		3%	13%	11%	17%	7%	-%	-%	20%	7%	-%	-%	39%	74%	53%	36%	62%	72%	28%
Fax services	84	5	17	6	19	6	-	-	22	7	-	-	35	57	38	32	50	61	23
	39%	33%	38%	44%	35%	43%	-%	-%	38%	43%	-%	-%	42%	38%	45%	37%	42%	40%	36%
		6%	21%	8%	23%	7%	-%	-%	26%	8%	-%	-%	42%	68%	46%	38%	60%	73%	27%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 65

## D2. Which of the following business uses do you use IP-based services for? (MULTI CODE)

Base : Those who use IP-based alternatives

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
								UP TO 3 YEARS	4+ YEARS						UP TO 2 YEARS	OVER 2 YEARS			
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK			YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX			YES	NO/DK
Significance Level: 95%	*a	b	*c	d	*e	*f	*g	h	*i	*j	*k	l	m	n	o	p	q	r	
Unweighted total	218	19	48	18	63	15	-	-	63	20	-	-	88	155	92	82	127	156	62
Effective Weighted Sample	197	18	40	15	53	14	-	-	53	18	-	-	77	143	85	74	116	140	57
Total	216	15	45	14	55	14	-	-	57	17	-	-	84	151	85	88	121	153	63
		7%	21%	7%	25%	7%	-%	-%	26%	8%	-%	-%	39%	70%	39%	41%	56%	71%	29%
Security/alarm systems	84	5	20	4	24	4	-	-	24	5	-	-	37	66	41	27	55	65	19
	39%	31%	44%	28%	44%	28%	-%	-%	41%	31%	-%	-%	44%	44%	48%	31%	46%	42%	30%
		6%	24%	5%	29%	5%	-%	-%	28%	6%	-%	-%	44%	78%	49%	32%	66%	77%	23%
Don't know	3	-	1	*	1	-	-	-	-	1	-	-	-	-	1	-	1	1	2
	2%	-%	2%	3%	2%	-%	-%	-%	-%	5%	-%	-%	-%	-%	1%	-%	1%	1%	4%
		-%	24%	13%	37%	-%	-%	-%	-%	24%	-%	-%	-%	-%	39%	-%	24%	24%	76%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 66

D3A. Please rank the functions for which your company uses IP based services in order of importance? FIRST MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use IP-based alternatives

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION												IP SWITCHED		IP NOT SWITCHED	
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30				IP NOT ISDN2 & IP	ISDN30		ISDN	ISDN	ISDN	ISDN	ANY			
					£1M-£20M	£21M-£100M	£100M	ONLY		ONLY	BOTH	& IP	& IP											
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	*k	l	m	n	o	p	q	*r	s				
Unweighted total	218	38	57	122	30	62	57	62	91	85	33	27	58	100	91	85	118	67	16	218				
Effective Weighted Sample	197	36	56	115	27	58	53	58	75	84	20	27	57	97	75	84	102	58	14	197				
Total	216	51	68	97	38	67	51	52	74	74	25	25	49	116	74	74	100	61	13	216				
		24%	32%	45%	18%	31%	24%	24%	34%	34%	12%	12%	23%	54%	34%	34%	46%	28%	6%	100%				
Incoming calls	82	21	26	35	19	23	14	23	21	21	7	7	14	54	21	21	28	17	3	82				
	38%	41%	38%	36%	50%	34%	27%	45%	28%	28%	28%	28%	28%	47%	28%	28%	28%	29%	25%	38%				
					f								hilnopq											
		25%	32%	43%	23%	27%	17%	28%	25%	25%	9%	9%	17%	66%	25%	25%	34%	21%	4%	100%				
Internet services	44	10	12	21	5	15	13	9	17	19	4	6	13	21	17	19	23	14	2	44				
	20%	20%	18%	22%	13%	23%	26%	18%	24%	25%	17%	22%	27%	18%	24%	25%	23%	23%	12%	20%				
		23%	28%	49%	11%	35%	30%	21%	40%	43%	10%	13%	30%	47%	40%	43%	53%	32%	4%	100%				
Calls between different sites	21	5	4	11	6	6	6	3	9	10	5	6	4	6	9	10	16	11	1	21				
	10%	11%	6%	12%	17%	9%	11%	6%	13%	14%	21%	25%	8%	5%	13%	14%	16%	17%	10%	10%				
					m				m	m	m	m	m	m	m	m	m	m	m	m				
		25%	21%	54%	30%	27%	28%	15%	44%	49%	25%	30%	20%	26%	44%	49%	74%	50%	6%	100%				
Outgoing calls	21	5	6	9	4	6	6	4	10	8	3	1	7	10	10	8	11	7	2	21				
	10%	10%	9%	9%	11%	8%	12%	8%	13%	10%	13%	4%	13%	8%	13%	10%	11%	11%	14%	10%				
		25%	31%	43%	21%	28%	31%	21%	47%	37%	16%	5%	32%	48%	47%	37%	52%	33%	9%	100%				
Data services	15	3	5	8	1	5	5	4	4	4	2	2	3	9	4	4	6	2	3	15				
	7%	6%	7%	8%	4%	8%	9%	7%	6%	6%	7%	6%	5%	8%	6%	6%	6%	3%	20%	7%				
		18%	32%	49%	9%	35%	31%	25%	29%	27%	12%	10%	17%	61%	29%	27%	39%	10%	17%	100%				
Fax services	14	4	6	3	2	6	4	2	7	8	1	2	5	5	7	8	9	7	1	14				
	6%	8%	9%	3%	5%	8%	8%	4%	9%	10%	6%	8%	11%	4%	9%	10%	9%	12%	6%	6%				
		29%	46%	24%	15%	40%	30%	16%	49%	54%	10%	15%	39%	36%	49%	54%	64%	51%	6%	100%				
Card payments	7	-	4	3	-	4	1	2	3	2	2	1	1	4	3	2	3	1	1	7				
	3%	-%	6%	3%	-%	6%	2%	4%	4%	2%	7%	3%	2%	3%	4%	2%	3%	2%	6%	3%				
		-%	57%	43%	-%	57%	11%	32%	37%	23%	26%	11%	11%	51%	37%	23%	49%	20%	11%	100%				
Security/alarm systems	5	1	1	3	-	2	1	2	-	1	-	1	-	4	-	1	1	-	1	5				
	2%	2%	2%	3%	-%	3%	2%	4%	-%	1%	-%	4%	-%	4%	-%	1%	1%	-%	8%	2%				
		24%	20%	57%	-%	43%	19%	38%	-%	20%	-%	20%	-%	80%	-%	20%	20%	-%	20%	100%				

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 66

D3A. Please rank the functions for which your company uses IP based services in order of importance? FIRST MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use IP-based alternatives

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION													
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30		ISDN30		IP		ISDN30		IP SWITCHED		IP NOT SWITCHED		ANY
					£1M	£1M-£20M	£21M-£100M	OVER £100M		ONLY	BOTH	NOT	ISDN2 & IP	& IP	& IP	ISDN	ISDN					
Significance Level: 95%	a	b	c	d	e	f	g	h	i	j	*k	l	m	n	o	p	q	*r	s			
Unweighted total	218	38	57	122	30	62	57	62	91	85	33	27	58	100	91	85	118	67	16	218		
Effective Weighted Sample	197	36	56	115	27	58	53	58	75	84	20	27	57	97	75	84	102	58	14	197		
Total	216	51	68	97	38	67	51	52	74	74	25	25	49	116	74	74	100	61	13	216		
		24%	32%	45%	18%	31%	24%	24%	34%	34%	12%	12%	23%	54%	34%	34%	46%	28%	6%	100%		
Video conferencing	3	-	2	1	-	1	-	1	1	1	-	-	1	2	1	1	1	1	-	3		
	2%	-%	3%	1%	-%	2%	-%	2%	1%	1%	-%	-%	2%	2%	1%	1%	1%	2%	-%	2%		
		-%	70%	30%	-%	31%	-%	30%	31%	31%	-%	-%	31%	69%	31%	31%	31%	31%	-%	100%		
Don't know	3	1	-	2	-	-	1	1	2	2	*	-	2	1	2	2	2	1	-	3		
	2%	2%	-%	2%	-%	-%	2%	2%	3%	2%	2%	-%	3%	1%	3%	2%	2%	1%	-%	2%		
		39%	-%	61%	-%	-%	37%	24%	61%	49%	13%	-%	49%	39%	61%	49%	61%	24%	-%	100%		
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																						

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 66

D3A. Please rank the functions for which your company uses IP based services in order of importance? FIRST MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use IP-based alternatives

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30		ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
Significance Level: 95%		a	b	c	d	*e	f	*g	h	i	j	*k	l	*m	n	o	p	q
Unweighted total	218	52	33	133	45	22	39	22	154	64	72	13	71	1	88	130	87	120
Effective Weighted Sample	197	41	32	125	40	16	38	22	141	57	61	12	60	1	80	118	79	110
Total	216	44	31	141	37	21	35	20	158	58	65	10	64	1	95	121	97	108
		20%	14%	65%	17%	10%	16%	9%	73%	27%	30%	5%	30%	*%	44%	56%	45%	50%
Incoming calls	82	15	6	62	13	4	7	7	66	16	19	1	19	-	34	48	39	40
	38%	34%	19%	44%	35%	17%	20%	35%	42%	28%	30%	12%	30%	-%	36%	40%	40%	37%
		18%	7%	b 75%	16%	4%	9%	8%	f 80%	20%	24%	1%	24%	-%	41%	59%	47%	49%
Internet services	44	6	10	28	7	4	11	2	32	12	14	2	14	-	19	24	18	24
	20%	13%	31%	20%	19%	21%	32%	11%	21%	20%	21%	18%	21%	-%	20%	20%	19%	22%
		14%	22%	65%	16%	10%	25%	5%	74%	26%	31%	4%	31%	-%	44%	56%	42%	54%
Calls between different sites	21	6	5	9	2	6	6	1	15	6	11	1	11	-	11	10	12	9
	10%	14%	18%	7%	5%	30%	17%	5%	10%	10%	17%	8%	17%	-%	12%	8%	13%	8%
		30%	26%	44%	9%	29%	28%	5%	73%	27%	52%	4%	52%	-%	54%	46%	59%	41%
Outgoing calls	21	6	3	12	5	2	4	3	12	9	8	1	7	1	9	11	8	13
	10%	14%	8%	9%	15%	11%	10%	16%	7%	15%	12%	8%	11%	100%	10%	9%	8%	12%
		29%	12%	58%	26%	11%	18%	15%	56%	44%	38%	4%	34%	4%	46%	54%	37%	63%
Data services	15	3	1	11	3	-	2	1	15	1	4	-	4	-	9	6	10	4
	7%	8%	3%	8%	9%	-%	5%	4%	9%	1%	6%	-%	7%	-%	9%	5%	10%	4%
		22%	5%	73%	22%	-%	10%	5%	95%	5%	27%	-%	27%	-%	58%	42%	62%	26%
Fax services	14	4	5	5	4	3	3	5	7	7	6	3	6	-	7	7	3	10
	6%	9%	16%	4%	11%	14%	8%	24%	5%	11%	9%	28%	9%	-%	7%	6%	3%	9%
		29%	c 35%	36%	29%	21%	21%	34%	52%	48%	44%	21%	44%	-%	49%	51%	21%	72%
Card payments	7	1	1	5	-	1	1	-	1	6	1	1	1	-	1	6	3	3
	3%	3%	3%	3%	-%	7%	2%	-%	1%	10%	2%	8%	2%	-%	1%	5%	3%	3%
		20%	11%	69%	-%	20%	11%	-%	14%	dh 86%	20%	11%	20%	-%	20%	80%	49%	46%
Security/alarm systems	5	-	1	4	-	-	1	-	5	-	-	1	-	-	1	4	2	3
	2%	-%	3%	3%	-%	-%	3%	-%	3%	-%	-%	10%	-%	-%	1%	4%	2%	3%
		-%	20%	80%	-%	-%	20%	-%	100%	-%	-%	20%	-%	-%	19%	81%	43%	57%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q



# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 66

D3A. Please rank the functions for which your company uses IP based services in order of importance? FIRST MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use IP-based alternatives

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	b	c	d	*e	f	*g	h	i	j	*k	l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	218	52	33	133	45	22	39	22	154	64	72	13	71	1	88	130	87	120
Effective Weighted Sample	197	41	32	125	40	16	38	22	141	57	61	12	60	1	80	118	79	110
Total	216	44	31	141	37	21	35	20	158	58	65	10	64	1	95	121	97	108
		20%	14%	65%	17%	10%	16%	9%	73%	27%	30%	5%	30%	*%	44%	56%	45%	50%
Video conferencing	3	1	-	2	1	-	-	1	2	1	1	-	1	-	1	2	1	1
	2%	2%	-%	2%	3%	-%	-%	5%	1%	2%	2%	-%	2%	-%	1%	2%	1%	1%
		31%	-%	69%	31%	-%	-%	31%	69%	31%	31%	-%	31%	-%	31%	69%	31%	30%
Don't know	3	1	-	2	1	-	1	-	2	2	*	1	*	-	2	1	*	2
	2%	3%	-%	1%	3%	-%	2%	-%	1%	3%	1%	8%	1%	-%	2%	1%	*%	1%
		37%	-%	63%	37%	-%	24%	-%	51%	49%	13%	24%	13%	-%	63%	37%	13%	49%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 66

D3A. Please rank the functions for which your company uses IP based services in order of importance? FIRST MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use IP-based alternatives

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
	LAST YEAR	EVER	NEVER	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%	*a	b	*c	d	*e	*f	*g	h	*i	*j	*k	l	m	n	o	p	q	r
Unweighted total	218	19	48	18	63	15	-	63	20	-	-	88	155	92	82	127	156	62
Effective Weighted Sample	197	18	40	15	53	14	-	53	18	-	-	77	143	85	74	116	140	57
Total	216	15	45	14	55	14	-	57	17	-	-	84	151	85	88	121	153	63
	7%	21%	7%	25%	7%	-	-	26%	8%	-	-	39%	70%	39%	41%	56%	71%	29%
Incoming calls	82	7	10	3	15	3	-	16	5	-	-	33	62	31	35	47	62	20
	38%	47%	23%	22%	27%	19%	-	28%	28%	-	-	40%	41%	37%	40%	39%	41%	32%
		9%	12%	4%	18%	3%	-	19%	6%	-	-	41%	75%	38%	43%	57%	75%	25%
Internet services	44	3	11	2	13	2	-	14	2	-	-	13	31	20	12	31	29	15
	20%	18%	25%	11%	24%	15%	-	24%	9%	-	-	16%	21%	23%	14%	26%	19%	24%
		6%	26%	4%	30%	5%	-	32%	4%	-	-	30%	71%	44%	28%	71%	66%	34%
Calls between different sites	21	1	10	1	10	1	-	11	1	-	-	11	15	6	13	7	17	4
	10%	5%	22%	9%	19%	8%	-	18%	7%	-	-	13%	10%	7%	15%	6%	11%	7%
		4%	46%	6%	48%	6%	-	50%	6%	-	-	52%	71%	27%	63%	35%	80%	20%
Outgoing calls	21	2	5	2	7	1	-	6	2	-	-	10	16	8	5	15	12	8
	10%	13%	11%	12%	12%	7%	-	11%	14%	-	-	12%	10%	9%	6%	13%	8%	13%
		10%	23%	9%	33%	5%	-	30%	12%	-	-	49%	76%	37%	25%	75%	61%	39%
Data services	15	2	-	3	1	3	-	2	1	-	-	9	14	4	6	9	9	6
	7%	10%	-	18%	1%	18%	-	3%	8%	-	-	11%	9%	4%	7%	7%	6%	9%
		10%	-	17%	5%	17%	-	13%	9%	-	-	59%	92%	24%	38%	57%	61%	39%
Fax services	14	1	6	2	6	2	-	6	3	-	-	3	6	7	6	7	11	3
	6%	7%	13%	13%	11%	13%	-	11%	17%	-	-	4%	4%	8%	7%	5%	7%	5%
		7%	44%	13%	44%	13%	-	44%	21%	-	-	24%	41%	50%	46%	47%	78%	22%
Card payments	7	-	1	1	1	1	-	1	1	-	-	3	4	4	5	2	6	1
	3%	-	3%	5%	3%	5%	-	2%	5%	-	-	4%	3%	5%	5%	1%	4%	1%
		-	20%	11%	20%	11%	-	20%	11%	-	-	46%	54%	61%	68%	26%	89%	11%
Security/alarm systems	5	-	-	1	-	1	-	-	1	-	-	1	3	4	4	1	4	1
	2%	-	-	7%	-	7%	-	-	6%	-	-	1%	2%	5%	5%	1%	3%	2%
		-	-	20%	-	20%	-	-	20%	-	-	19%	57%	76%	81%	19%	80%	20%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 66

D3A. Please rank the functions for which your company uses IP based services in order of importance? FIRST MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use IP-based alternatives

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%		*a	b	*c	d	*e	*f	*g	h	*i	*j	*k	l	m	n	o	p	q	r
Unweighted total	218	19	48	18	63	15	-	-	63	20	-	-	88	155	92	82	127	156	62
Effective Weighted Sample	197	18	40	15	53	14	-	-	53	18	-	-	77	143	85	74	116	140	57
Total	216	15	45	14	55	14	-	-	57	17	-	-	84	151	85	88	121	153	63
		7%	21%	7%	25%	7%	-%	-%	26%	8%	-%	-%	39%	70%	39%	41%	56%	71%	29%
Video conferencing	3	-	1	-	-	1	-	-	1	-	-	-	-	1	1	1	1	1	2
	2%	-%	2%	-%	-%	7%	-%	-%	2%	-%	-%	-%	-%	1%	1%	1%	1%	1%	3%
		-%	31%	-%	-%	31%	-%	-%	31%	-%	-%	-%	-%	30%	30%	31%	30%	39%	61%
Don't know	3	-	1	*	1	-	-	-	-	1	-	-	-	-	1	-	1	1	2
	2%	-%	2%	3%	2%	-%	-%	-%	-%	5%	-%	-%	-%	-%	1%	-%	1%	1%	4%
		-%	24%	13%	37%	-%	-%	-%	-%	24%	-%	-%	-%	-%	39%	-%	24%	24%	76%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 67**

**D3B. Please rank the functions for which your company uses IP based services in order of importance? SECOND MOST IMPORTANT FUNCTION (SINGLE CODE)**

Base : Those who use IP-based alternatives

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											IP		IP NOT	ANY
	Total	UNDER			£1M- £20M	£21M-£10 OVER			ISDN2	ISDN30			ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN2 & IP	ISDN30 & IP	ISDN & IP	SWITCHED ISDN	SWITCHED ISDN			
		1-49	50-249	250+		£1M	£1M- £20M	£21M-£10 OM		£100M	ISDN2	ISDN30 ONLY									ISDN30 ONLY	ISDN30 ONLY	
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	*k	l	m	& n	o	p	q	*r	s			
Unweighted total	218	38	57	122	30	62	57	62	91	85	33	27	58	100	91	85	118	67	16	218			
Effective Weighted Sample	197	36	56	115	27	58	53	58	75	84	20	27	57	97	75	84	102	58	14	197			
Total	216	51	68	97	38	67	51	52	74	74	25	25	49	116	74	74	100	61	13	216			
		24%	32%	45%	18%	31%	24%	24%	34%	34%	12%	12%	23%	54%	34%	34%	46%	28%	6%	100%			
Outgoing calls	48	12	16	19	7	16	10	13	9	9	3	3	7	36	9	9	12	5	1	48			
	22%	24%	24%	20%	18%	23%	20%	24%	12%	13%	10%	11%	13%	31%	12%	13%	12%	9%	11%	22%			
														hilnopq						pq			
		25%	34%	41%	14%	33%	21%	26%	19%	20%	6%	6%	14%	75%	19%	20%	25%	11%	3%	100%			
Internet services	25	1	9	15	5	5	9	7	10	9	3	3	6	13	10	9	12	6	1	25			
	12%	3%	13%	15%	13%	7%	17%	13%	13%	12%	14%	10%	13%	11%	13%	12%	12%	10%	10%	12%			
				a																			
		6%	35%	59%	20%	19%	35%	27%	39%	35%	14%	10%	25%	51%	39%	35%	49%	24%	5%	100%			
Incoming calls	25	8	7	9	4	10	7	2	4	4	2	3	2	18	4	4	7	1	2	25			
	11%	16%	11%	9%	11%	15%	13%	4%	5%	6%	9%	10%	4%	15%	5%	6%	7%	2%	14%	11%			
														hilnopq						q			
		33%	30%	37%	17%	40%	28%	9%	17%	18%	9%	11%	7%	73%	17%	18%	27%	6%	7%	100%			
Data services	21	5	5	11	5	3	6	7	7	8	5	6	2	8	7	8	13	8	2	21			
	10%	9%	8%	12%	12%	5%	12%	13%	9%	10%	21%	23%	3%	7%	9%	10%	13%	13%	14%	10%			
											l												
		21%	24%	54%	21%	15%	30%	33%	32%	36%	25%	28%	7%	40%	32%	36%	60%	38%	9%	100%			
Card payments	16	5	5	6	6	2	4	3	6	5	1	1	4	9	6	5	7	3	2	16			
	7%	10%	7%	6%	17%	4%	7%	6%	8%	7%	6%	3%	9%	8%	8%	7%	7%	5%	12%	7%			
					e																		
		31%	30%	39%	40%	15%	24%	21%	37%	33%	9%	5%	28%	58%	37%	33%	42%	19%	10%	100%			
Calls between different sites	14	1	6	7	2	5	2	3	5	4	*	-	4	10	5	4	5	5	-	14			
	7%	3%	9%	7%	6%	8%	4%	6%	6%	6%	2%	-%	9%	8%	6%	6%	5%	8%	-%	7%			
		10%	44%	46%	17%	37%	13%	24%	32%	29%	3%	-%	29%	68%	32%	29%	32%	32%	-%	100%			
Security/alarm systems	14	-	5	8	-	3	6	4	10	10	1	1	9	2	10	10	11	7	1	14			
	6%	-%	8%	8%	-%	5%	12%	8%	14%	14%	3%	4%	19%	2%	14%	14%	11%	12%	6%	6%			
									ms	ms			ms		ms	ms	m	m					
		-%	40%	60%	-%	24%	44%	32%	75%	77%	6%	8%	69%	17%	75%	77%	83%	54%	6%	100%			
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																							

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 67

D3B. Please rank the functions for which your company uses IP based services in order of importance? SECOND MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use IP-based alternatives

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											IP SWITCHED		IP NOT SWITCHED		ANY IP
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	ISDN	ISDN					
					£1M	£1M-£20M	£21M-£100M	OVER £100M																
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	*k	l	m	n	o	p	q	*r	s				
Unweighted total	218	38	57	122	30	62	57	62	91	85	33	27	58	100	91	85	118	67	16	218				
Effective Weighted Sample	197	36	56	115	27	58	53	58	75	84	20	27	57	97	75	84	102	58	14	197				
Total	216	51	68	97	38	67	51	52	74	74	25	25	49	116	74	74	100	61	13	216				
		24%	32%	45%	18%	31%	24%	24%	34%	34%	12%	12%	23%	54%	34%	34%	46%	28%	6%	100%				
Video conferencing	11	3	1	6	-	6	3	2	3	2	1	1	2	7	3	2	4	1	-	11				
	5%	6%	2%	7%	-%	9%	5%	4%	4%	3%	6%	3%	3%	6%	4%	3%	4%	2%	-%	5%				
		27%	13%	60%	-%	55%	26%	19%	28%	22%	13%	7%	15%	64%	28%	22%	36%	13%	-%	100%				
Fax services	4	-	1	3	-	2	1	1	2	3	1	2	1	1	2	3	3	3	-	4				
	2%	-%	2%	4%	-%	3%	2%	2%	2%	4%	3%	7%	2%	1%	2%	4%	3%	4%	-%	2%				
		-%	23%	77%	-%	50%	23%	27%	37%	59%	19%	41%	18%	22%	37%	59%	78%	60%	-%	100%				
Don't know/ None given	39	16	12	11	9	15	3	9	19	19	7	7	12	12	19	19	26	21	4	39				
	18%	31%	17%	12%	23%	22%	7%	17%	26%	26%	27%	27%	25%	11%	26%	26%	26%	34%	34%	18%				
		c			f	f			m	m			m		m	m	m	ms						
		40%	31%	29%	23%	39%	9%	23%	50%	50%	18%	18%	32%	32%	50%	50%	68%	53%	11%	100%				
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																								

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 67

D3B. Please rank the functions for which your company uses IP based services in order of importance? SECOND MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use IP-based alternatives

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	b	c	d	*e	f	*g	h	i	j	*k	l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	218	52	33	133	45	22	39	22	154	64	72	13	71	1	88	130	87	120
Effective Weighted Sample	197	41	32	125	40	16	38	22	141	57	61	12	60	1	80	118	79	110
Total	216	44	31	141	37	21	35	20	158	58	65	10	64	1	95	121	97	108
		20%	14%	65%	17%	10%	16%	9%	73%	27%	30%	5%	30%	*%	44%	56%	45%	50%
Outgoing calls	48	7	-	41	7	-	3	2	39	9	7	-	7	-	17	31	27	17
	22%	15%	-%	29%	19%	-%	7%	8%	25%	15%	11%	-%	11%	-%	18%	25%	28%	15%
		b		b					f								q	
		14%	-%	86%	14%	-%	5%	3%	82%	18%	14%	-%	14%	-%	36%	64%	58%	35%
Internet services	25	4	3	18	4	3	3	2	19	6	7	*	7	-	8	17	10	15
	12%	9%	11%	13%	10%	14%	10%	12%	12%	11%	11%	4%	11%	-%	8%	14%	10%	14%
		16%	13%	71%	14%	11%	13%	9%	75%	25%	28%	2%	28%	-%	32%	68%	39%	58%
Incoming calls	25	2	1	21	3	-	1	-	20	4	3	*	3	-	11	13	14	11
	11%	5%	3%	15%	9%	-%	3%	-%	13%	8%	4%	4%	4%	-%	12%	11%	14%	10%
		9%	4%	87%	13%	-%	4%	-%	82%	18%	12%	2%	12%	-%	46%	54%	56%	44%
Data services	21	3	7	11	1	3	7	-	17	4	8	2	8	-	11	10	7	13
	10%	7%	22%	8%	2%	15%	19%	-%	11%	7%	12%	18%	13%	-%	11%	9%	7%	12%
			c				d											
		15%	32%	53%	4%	15%	32%	-%	80%	20%	38%	9%	38%	-%	50%	50%	32%	63%
Card payments	16	4	2	10	2	2	2	2	15	1	5	1	5	-	12	4	9	6
	7%	9%	6%	7%	6%	12%	7%	9%	10%	1%	7%	10%	7%	-%	12%	4%	9%	5%
									i						o			
		24%	11%	65%	15%	15%	15%	11%	95%	5%	29%	6%	29%	-%	72%	28%	58%	36%
Calls between different sites	14	4	1	10	3	1	3	1	9	5	5	-	5	-	5	9	6	8
	7%	9%	3%	7%	9%	6%	10%	4%	6%	9%	7%	-%	7%	-%	5%	7%	7%	7%
		27%	6%	68%	24%	9%	24%	6%	63%	37%	32%	-%	32%	-%	37%	63%	45%	55%
Security/alarm systems	14	2	6	5	4	3	5	3	8	6	7	1	7	-	2	11	2	11
	6%	4%	21%	4%	11%	14%	13%	17%	5%	9%	11%	8%	11%	-%	3%	9%	2%	10%
			ac														p	
		12%	48%	41%	31%	21%	34%	25%	59%	41%	54%	6%	54%	-%	18%	82%	12%	79%
Video conferencing	11	1	-	9	1	-	-	-	9	1	1	-	1	-	5	5	5	5
	5%	3%	-%	7%	4%	-%	-%	-%	6%	2%	2%	-%	2%	-%	6%	4%	6%	5%
		13%	-%	87%	13%	-%	-%	-%	87%	13%	13%	-%	13%	-%	51%	49%	51%	49%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 67

D3B. Please rank the functions for which your company uses IP based services in order of importance? SECOND MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use IP-based alternatives

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30		ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
Significance Level: 95%		a	b	c	d	*e	f	*g	h	i	j	*k	l	*m	n	o	p	q
Unweighted total	218	52	33	133	45	22	39	22	154	64	72	13	71	1	88	130	87	120
Effective Weighted Sample	197	41	32	125	40	16	38	22	141	57	61	12	60	1	80	118	79	110
Total	216	44	31	141	37	21	35	20	158	58	65	10	64	1	95	121	97	108
		20%	14%	65%	17%	10%	16%	9%	73%	27%	30%	5%	30%	*%	44%	56%	45%	50%
Fax services	4	1	2	2	*	*	2	-	3	1	3	-	3	-	2	2	1	3
	2%	2%	6%	1%	1%	2%	5%	-%	2%	2%	4%	-%	4%	-%	2%	2%	1%	3%
		19%	41%	40%	9%	9%	41%	-%	67%	33%	60%	-%	60%	-%	50%	50%	22%	78%
Don't know/ None given	39	17	9	13	11	8	9	10	18	20	20	6	19	1	21	17	15	20
	18%	38%	28%	9%	29%	38%	25%	49%	12%	35%	30%	56%	29%	100%	22%	14%	16%	18%
		c	c		h		h		h									
		43%	23%	34%	28%	20%	23%	25%	47%	53%	51%	15%	49%	2%	55%	45%	39%	51%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 67

D3B. Please rank the functions for which your company uses IP based services in order of importance? SECOND MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use IP-based alternatives

	SWITCHING ISDN SUPPLIER				CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
	Total	NEVER			YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
		LAST YEAR	EVER	/DK															
Significance Level: 95%		*a	b	*c	d	*e	*f	*g	h	*i	*j	*k	l	m	n	o	p	q	r
Unweighted total	218	19	48	18	63	15	-	-	63	20	-	-	88	155	92	82	127	156	62
Effective Weighted Sample	197	18	40	15	53	14	-	-	53	18	-	-	77	143	85	74	116	140	57
Total	216	15	45	14	55	14	-	-	57	17	-	-	84	151	85	88	121	153	63
		7%	21%	7%	25%	7%	-%	-%	26%	8%	-%	-%	39%	70%	39%	41%	56%	71%	29%
Outgoing calls	48	5	1	1	5	1	-	-	5	2	-	-	18	35	16	16	32	36	12
	22%	30%	2%	10%	10%	10%	-%	-%	8%	13%	-%	-%	21%	23%	18%	18%	26%	24%	18%
		10%	2%	3%	11%	3%	-%	-%	10%	5%	-%	-%	37%	73%	32%	33%	67%	76%	24%
Internet services	25	2	5	1	7	*	-	-	7	1	-	-	12	21	11	9	15	19	7
	12%	10%	10%	9%	12%	3%	-%	-%	12%	5%	-%	-%	14%	14%	13%	10%	13%	12%	10%
		6%	18%	5%	26%	2%	-%	-%	26%	3%	-%	-%	48%	83%	45%	34%	61%	74%	26%
Incoming calls	25	-	1	2	1	1	-	-	1	2	-	-	6	20	4	11	14	12	12
	11%	-%	3%	13%	3%	10%	-%	-%	3%	11%	-%	-%	7%	13%	5%	12%	12%	8%	20%
		-%	6%	7%	6%	6%	-%	-%	6%	7%	-%	-%	25%	83%	16%	43%	57%	50%	50%
Data services	21	-	8	2	7	3	-	-	9	1	-	-	10	14	10	9	11	16	5
	10%	-%	18%	13%	13%	18%	-%	-%	15%	6%	-%	-%	11%	9%	11%	10%	9%	11%	7%
		-%	38%	9%	34%	12%	-%	-%	42%	5%	-%	-%	45%	66%	45%	41%	52%	78%	22%
Card payments	16	2	1	3	2	1	-	-	3	2	-	-	8	9	10	8	8	11	5
	7%	10%	3%	18%	4%	5%	-%	-%	5%	11%	-%	-%	9%	6%	11%	9%	6%	7%	9%
		10%	9%	16%	14%	5%	-%	-%	19%	11%	-%	-%	47%	56%	60%	52%	48%	66%	34%
Calls between different sites	14	2	3	-	5	-	-	-	4	1	-	-	5	13	5	7	7	11	3
	7%	10%	7%	-%	8%	-%	-%	-%	7%	5%	-%	-%	7%	9%	6%	8%	6%	7%	5%
		11%	21%	-%	32%	-%	-%	-%	27%	6%	-%	-%	39%	91%	38%	51%	49%	78%	22%
Security/alarm systems	14	1	6	1	8	-	-	-	7	1	-	-	10	11	4	3	10	12	2
	6%	5%	14%	5%	15%	-%	-%	-%	13%	5%	-%	-%	12%	7%	5%	4%	8%	8%	3%
		6%	48%	6%	59%	-%	-%	-%	54%	6%	-%	-%	72%	79%	32%	25%	72%	87%	13%
Video conferencing	11	-	1	-	-	1	-	-	1	-	-	-	3	9	4	3	8	5	5
	5%	-%	3%	-%	-%	10%	-%	-%	2%	-%	-%	-%	4%	6%	5%	3%	6%	3%	8%
		-%	13%	-%	-%	13%	-%	-%	13%	-%	-%	-%	32%	83%	41%	28%	72%	51%	49%
Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																			



# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 67

D3B. Please rank the functions for which your company uses IP based services in order of importance? SECOND MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use IP-based alternatives

	SWITCHING ISDN SUPPLIER				CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%		*a	b	*c	d	*e	*f	*g	h	*i	*j	*k	l	m	n	o	p	q	r
Unweighted total	218	19	48	18	63	15	-	-	63	20	-	-	88	155	92	82	127	156	62
Effective Weighted Sample	197	18	40	15	53	14	-	-	53	18	-	-	77	143	85	74	116	140	57
Total	216	15	45	14	55	14	-	-	57	17	-	-	84	151	85	88	121	153	63
		7%	21%	7%	25%	7%	-%	-%	26%	8%	-%	-%	39%	70%	39%	41%	56%	71%	29%
Fax services	4	*	2	-	2	-	-	-	3	-	-	-	3	4	2	1	3	2	2
	2%	3%	5%	-%	3%	-%	-%	-%	5%	-%	-%	-%	3%	3%	2%	1%	3%	1%	3%
		9%	50%	-%	37%	-%	-%	-%	60%	-%	-%	-%	60%	91%	37%	27%	73%	50%	50%
Don't know/ None given	39	5	16	5	17	6	-	-	18	7	-	-	10	15	20	21	14	28	10
	18%	31%	35%	33%	32%	45%	-%	-%	31%	44%	-%	-%	12%	10%	23%	24%	11%	19%	16%
														m	p				
		12%	41%	12%	45%	17%	-%	-%	46%	19%	-%	-%	25%	40%	51%	55%	35%	74%	26%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 68

D3C. Please rank the functions for which your company uses IP based services in order of importance? THIRD MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use IP-based alternatives

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION												IP SWITCHED	IP NOT SWITCHED	ANY IP
	Total	UNDER			OVER				ISDN2	ISDN30			ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP				
		1-49	50-249	250+	£1M	£1M- £20M	£21M-£100M	£100M		i	j	k								l			
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q	r	s			
Unweighted total	218	38	57	122	30	62	57	62	91	85	33	27	58	100	91	85	118	67	16	218			
Effective Weighted Sample	197	36	56	115	27	58	53	58	75	84	20	27	57	97	75	84	102	58	14	197			
Total	216	51	68	97	38	67	51	52	74	74	25	25	49	116	74	74	100	61	13	216			
		24%	32%	45%	18%	31%	24%	24%	34%	34%	12%	12%	23%	54%	34%	34%	46%	28%	6%	100%			
Calls between different sites	30	4	14	12	4	12	7	7	8	6	4	2	4	20	8	6	10	4	2	30			
	14%	8%	20%	12%	9%	18%	14%	13%	11%	8%	14%	7%	9%	17%	11%	8%	10%	6%	17%	14%			
		14%	46%	40%	12%	41%	24%	22%	27%	21%	12%	6%	15%	67%	27%	21%	33%	12%	7%	100%			
Internet services	29	10	7	13	7	8	6	8	9	7	4	2	5	19	9	7	11	6	-	29			
	14%	19%	11%	13%	19%	13%	12%	15%	12%	9%	16%	8%	10%	16%	12%	9%	11%	9%	-%	14%			
		33%	25%	42%	24%	29%	21%	26%	29%	23%	13%	7%	16%	64%	29%	23%	36%	19%	-%	100%			
Outgoing calls	27	8	5	14	5	7	6	6	7	9	1	4	6	17	7	9	10	6	1	27			
	12%	16%	7%	15%	13%	11%	12%	12%	9%	12%	5%	14%	11%	14%	9%	12%	10%	9%	9%	12%			
		30%	17%	53%	19%	27%	23%	22%	25%	34%	5%	13%	20%	61%	25%	34%	39%	21%	4%	100%			
Incoming calls	17	3	8	6	2	4	8	3	6	5	2	-	5	11	6	5	6	3	1	17			
	8%	5%	12%	6%	6%	6%	15%	6%	9%	6%	7%	-%	10%	9%	9%	6%	7%	5%	6%	8%			
		16%	49%	35%	13%	24%	46%	18%	38%	27%	11%	-%	27%	62%	38%	27%	38%	18%	5%	100%			
Security/alarm systems	16	1	6	9	1	5	5	4	8	9	4	5	5	3	8	9	13	8	2	16			
	8%	3%	8%	9%	4%	8%	10%	8%	11%	13%	14%	18%	10%	3%	11%	13%	13%	13%	17%	8%			
		9%	35%	56%	9%	31%	32%	25%	51%	58%	22%	29%	29%	20%	51%	58%	80%	49%	13%	100%			
Video conferencing	16	3	3	10	3	2	6	6	3	4	2	3	2	10	3	4	6	3	*	16			
	7%	6%	5%	10%	7%	3%	11%	12%	5%	6%	7%	10%	4%	9%	5%	6%	6%	5%	3%	7%			
		17%	21%	62%	17%	11%	35%	37%	22%	27%	10%	16%	11%	62%	22%	27%	38%	20%	3%	100%			
Card payments	11	-	6	5	1	5	3	2	2	2	1	1	1	8	2	2	3	3	-	11			
	5%	-%	9%	5%	3%	7%	5%	4%	3%	2%	5%	4%	2%	7%	3%	2%	3%	4%	-%	5%			
		-%	55%	45%	12%	44%	24%	20%	18%	16%	11%	9%	7%	73%	18%	16%	27%	24%	-%	100%			
Fax services	9	3	4	3	1	3	2	1	2	2	-	-	2	7	2	2	2	1	-	9			
	4%	5%	6%	3%	3%	4%	3%	2%	2%	2%	-%	-%	3%	6%	2%	2%	2%	1%	-%	4%			
		28%	43%	29%	14%	29%	18%	11%	18%	18%	-%	-%	18%	82%	18%	18%	18%	9%	-%	100%			

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 68

D3C. Please rank the functions for which your company uses IP based services in order of importance? THIRD MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use IP-based alternatives

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											IP SWITCHED		IP NOT SWITCHED		ANY IP
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30				IP		ISDN30		ISDN	ISDN					
					£1M	£1M-£20M	£21M-£100M	OVER £100M		ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	NOT ISDN	ISDN2 & IP	& IP	ISDN & IP								
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	*k	l	m	n	o	p	q	r	s				
Unweighted total	218	38	57	122	30	62	57	62	91	85	33	27	58	100	91	85	118	67	16	218				
Effective Weighted Sample	197	36	56	115	27	58	53	58	75	84	20	27	57	97	75	84	102	58	14	197				
Total	216	51	68	97	38	67	51	52	74	74	25	25	49	116	74	74	100	61	13	216				
		24%	32%	45%	18%	31%	24%	24%	34%	34%	12%	12%	23%	54%	34%	34%	46%	28%	6%	100%				
Data services	7	-	1	6	-	1	3	3	5	4	1	1	3	2	5	4	5	3	1	7				
	3%	-%	2%	7%	-%	2%	6%	6%	6%	6%	5%	3%	7%	2%	6%	6%	5%	4%	6%	3%				
		-%	14%	86%	-%	19%	41%	40%	63%	56%	17%	11%	46%	27%	63%	56%	73%	35%	11%	100%				
Don't know/ None given	53	20	14	19	13	20	5	12	24	26	7	9	17	20	24	26	33	25	5	53				
	24%	39%	20%	19%	34%	29%	10%	24%	32%	35%	27%	35%	35%	17%	32%	35%	33%	42%	42%	24%				
		c			f	f			m	m			m		m	m	m	ms						
		38%	26%	36%	25%	37%	10%	23%	46%	50%	13%	17%	33%	37%	46%	50%	63%	48%	10%	100%				

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 68

D3C. Please rank the functions for which your company uses IP based services in order of importance? THIRD MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use IP-based alternatives

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	b	c	d	*e	f	*g	h	i	j	*k	l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	218	52	33	133	45	22	39	22	154	64	72	13	71	1	88	130	87	120
Effective Weighted Sample	197	41	32	125	40	16	38	22	141	57	61	12	60	1	80	118	79	110
Total	216	44	31	141	37	21	35	20	158	58	65	10	64	1	95	121	97	108
		20%	14%	65%	17%	10%	16%	9%	73%	27%	30%	5%	30%	*%	44%	56%	45%	50%
Calls between different sites	30	5	1	24	5	-	3	-	19	10	6	-	6	-	13	16	12	16
	14%	11%	3%	17%	14%	-%	7%	-%	12%	18%	9%	-%	9%	-%	14%	14%	12%	14%
		17%	3%	b	17%	-%	9%	-%	65%	35%	20%	-%	20%	-%	45%	55%	41%	52%
Internet services	29	5	1	24	2	3	-	2	26	3	5	1	5	-	11	18	17	11
	14%	11%	3%	17%	7%	15%	-%	8%	17%	5%	7%	8%	7%	-%	12%	15%	17%	11%
		16%	3%	b	8%	11%	-%	5%	89%	11%	16%	3%	16%	-%	38%	62%	57%	39%
Outgoing calls	27	3	4	20	3	2	3	3	20	7	6	1	6	-	9	18	13	14
	12%	7%	12%	14%	9%	8%	7%	17%	13%	11%	9%	12%	9%	-%	9%	15%	13%	13%
		12%	13%	75%	12%	6%	10%	13%	76%	24%	21%	4%	21%	-%	32%	68%	47%	50%
Incoming calls	17	1	3	13	2	2	4	-	14	3	4	-	4	-	5	12	6	8
	8%	2%	9%	9%	6%	9%	11%	-%	9%	5%	6%	-%	6%	-%	5%	10%	6%	7%
		6%	17%	77%	12%	11%	23%	-%	84%	16%	23%	-%	23%	-%	27%	73%	37%	47%
Security/alarm systems	16	6	5	6	4	3	6	1	12	4	10	-	10	-	8	9	7	10
	8%	13%	15%	4%	10%	13%	18%	4%	8%	7%	16%	-%	16%	-%	8%	7%	7%	9%
		34%	29%	c	23%	16%	38%	5%	74%	26%	63%	-%	63%	-%	48%	52%	41%	59%
Video conferencing	16	2	2	13	3	-	3	-	10	6	4	-	4	-	7	9	5	10
	7%	4%	7%	9%	7%	-%	8%	-%	7%	10%	6%	-%	6%	-%	7%	8%	5%	10%
		10%	13%	77%	16%	-%	18%	-%	64%	36%	23%	-%	23%	-%	43%	57%	32%	63%
Card payments	11	1	2	9	1	*	2	-	9	3	3	-	3	-	6	5	6	5
	5%	2%	6%	6%	3%	2%	5%	-%	5%	5%	4%	-%	4%	-%	6%	4%	7%	5%
		7%	16%	76%	11%	4%	16%	-%	76%	24%	24%	-%	24%	-%	55%	45%	56%	44%
Fax services	9	1	-	8	1	-	-	1	8	1	1	-	1	-	7	2	5	4
	4%	2%	-%	6%	2%	-%	-%	4%	5%	1%	1%	-%	1%	-%	8%	1%	6%	3%
		9%	-%	91%	9%	-%	-%	9%	91%	9%	9%	-%	9%	-%	80%	20%	60%	40%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 68

D3C. Please rank the functions for which your company uses IP based services in order of importance? THIRD MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use IP-based alternatives

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30		ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
Significance Level: 95%		a	b	c	d	*e	f	*g	h	i	j	*k	l	*m	n	o	p	q
Unweighted total	218	52	33	133	45	22	39	22	154	64	72	13	71	1	88	130	87	120
Effective Weighted Sample	197	41	32	125	40	16	38	22	141	57	61	12	60	1	80	118	79	110
Total	216	44	31	141	37	21	35	20	158	58	65	10	64	1	95	121	97	108
		20%	14%	65%	17%	10%	16%	9%	73%	27%	30%	5%	30%	*%	44%	56%	45%	50%
Data services	7	2	2	4	1	2	1	2	7	1	3	*	3	-	2	5	1	6
	3%	4%	6%	3%	3%	11%	3%	8%	4%	1%	5%	4%	5%	-%	2%	4%	1%	6%
		22%	24%	54%	16%	30%	14%	21%	89%	11%	41%	6%	41%	-%	30%	70%	16%	84%
Don't know/ None given	53	20	12	20	15	9	14	11	31	21	24	8	24	1	27	25	24	25
	24%	45%	40%	15%	39%	43%	40%	58%	20%	36%	38%	76%	37%	100%	29%	21%	25%	23%
		c	c		h		h		h									
		38%	24%	39%	28%	17%	26%	22%	60%	40%	46%	15%	45%	2%	52%	48%	46%	47%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 68

D3C. Please rank the functions for which your company uses IP based services in order of importance? THIRD MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use IP-based alternatives

	SWITCHING ISDN SUPPLIER				CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%		*a	b	*c	d	*e	*f	*g	h	*i	*j	*k	l	m	n	o	p	q	r
Unweighted total	218	19	48	18	63	15	-	-	63	20	-	-	88	155	92	82	127	156	62
Effective Weighted Sample	197	18	40	15	53	14	-	-	53	18	-	-	77	143	85	74	116	140	57
Total	216	15	45	14	55	14	-	-	57	17	-	-	84	151	85	88	121	153	63
		7%	21%	7%	25%	7%	-%	-%	26%	8%	-%	-%	39%	70%	39%	41%	56%	71%	29%
Calls between different sites	30	2	1	2	2	3	-	-	3	2	-	-	15	22	7	7	22	21	8
	14%	15%	3%	15%	4%	19%	-%	-%	6%	11%	-%	-%	18%	15%	8%	8%	18%	14%	13%
		8%	5%	7%	8%	9%	-%	-%	11%	6%	-%	-%	50%	74%	22%	23%	73%	72%	28%
Internet services	29	1	5	-	5	1	-	-	4	1	-	-	14	22	12	15	14	24	5
	14%	5%	10%	-%	9%	5%	-%	-%	8%	7%	-%	-%	17%	15%	14%	17%	12%	16%	8%
		3%	16%	-%	16%	3%	-%	-%	15%	4%	-%	-%	48%	75%	40%	52%	48%	83%	17%
Outgoing calls	27	1	5	1	4	1	-	-	6	1	-	-	10	20	7	14	13	16	11
	12%	5%	11%	8%	8%	5%	-%	-%	10%	7%	-%	-%	11%	13%	8%	16%	11%	10%	18%
		3%	18%	4%	16%	3%	-%	-%	21%	4%	-%	-%	36%	75%	25%	51%	47%	58%	42%
Incoming calls	17	-	3	1	4	-	-	-	4	-	-	-	6	11	6	4	12	10	7
	8%	-%	7%	5%	7%	-%	-%	-%	7%	-%	-%	-%	7%	8%	7%	5%	10%	7%	11%
		-%	18%	5%	23%	-%	-%	-%	23%	-%	-%	-%	36%	67%	36%	25%	72%	60%	40%
Security/alarm systems	16	1	7	2	7	2	-	-	8	2	-	-	7	13	9	8	9	14	3
	8%	5%	16%	15%	13%	15%	-%	-%	14%	13%	-%	-%	9%	9%	10%	9%	7%	9%	4%
		5%	45%	13%	45%	13%	-%	-%	49%	13%	-%	-%	45%	82%	53%	46%	54%	84%	16%
Video conferencing	16	1	2	*	3	*	-	-	4	-	-	-	5	11	8	1	14	13	4
	7%	5%	5%	3%	6%	3%	-%	-%	6%	-%	-%	-%	6%	7%	9%	1%	12%	8%	6%
		5%	15%	3%	20%	3%	-%	-%	23%	-%	-%	-%	30%	65%	50%	6%	89%	78%	22%
Card payments	11	*	2	-	3	-	-	-	3	-	-	-	5	11	5	6	6	8	3
	5%	3%	5%	-%	5%	-%	-%	-%	5%	-%	-%	-%	6%	7%	6%	6%	5%	6%	4%
		4%	20%	-%	24%	-%	-%	-%	24%	-%	-%	-%	41%	96%	48%	50%	50%	75%	25%
Fax services	9	1	-	-	1	-	-	-	1	-	-	-	5	8	4	7	2	7	2
	4%	5%	-%	-%	1%	-%	-%	-%	1%	-%	-%	-%	6%	5%	5%	8%	2%	4%	4%
		9%	-%	-%	9%	-%	-%	-%	9%	-%	-%	-%	61%	86%	49%	74%	26%	74%	26%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 68

D3C. Please rank the functions for which your company uses IP based services in order of importance? THIRD MOST IMPORTANT FUNCTION (SINGLE CODE)

Base : Those who use IP-based alternatives

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
								UP TO 3 YEARS	4+ YEARS						UP TO 2 YEARS	OVER 2 YEARS			
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	h	i	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	o	p	q	r
Significance Level: 95%	*a	b	*c	d	*e	*f	*g	h	*i	*j	*k	l	m	n	o	p	q	r	
Unweighted total	218	19	48	18	63	15	-	-	63	20	-	-	88	155	92	82	127	156	62
Effective Weighted Sample	197	18	40	15	53	14	-	-	53	18	-	-	77	143	85	74	116	140	57
Total	216	15	45	14	55	14	-	-	57	17	-	-	84	151	85	88	121	153	63
		7%	21%	7%	25%	7%	-%	-%	26%	8%	-%	-%	39%	70%	39%	41%	56%	71%	29%
Data services	7	-	3	1	3	-	-	-	3	-	-	-	3	7	4	-	7	7	-
	3%	-%	6%	6%	6%	-%	-%	-%	6%	-%	-%	-%	4%	5%	4%	-%	6%	5%	-%
		-%	35%	11%	46%	-%	-%	-%	46%	-%	-%	-%	41%	100%	51%	-%	94%	100%	-%
Don't know/ None given	53	9	17	7	22	7	-	-	22	10	-	-	14	26	24	27	22	32	20
	24%	57%	37%	47%	41%	52%	-%	-%	38%	61%	-%	-%	17%	17%	28%	31%	18%	21%	32%
		16%	32%	13%	42%	14%	-%	-%	41%	19%	-%	-%	27%	49%	46%	51%	42%	62%	38%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 69**

**D3. Please rank the functions for which your company uses IP based services in order of importance? RANKED FIRST, SECOND OR THIRD MOST IMPORTANT FUNCTION (MULTI CODE)**

Base : Those who use IP-based alternatives

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											IP SWITCHED	IP NOT SWITCHED	ANY	
	Total	UNDER			£1M- £20M	OVER			ISDN2	ISDN30			ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN				ISDN
		1-49	50-249	250+		£1M	£21M-£100M	£100M		i	j	k											
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q	r	s			
Unweighted total	218	38	57	122	30	62	57	62	91	85	33	27	58	100	91	85	118	67	16	218			
Effective Weighted Sample	197	36	56	115	27	58	53	58	75	84	20	27	57	97	75	84	102	58	14	197			
Total	216	51	68	97	38	67	51	52	74	74	25	25	49	116	74	74	100	61	13	216			
		24%	32%	45%	18%	31%	24%	24%	34%	34%	12%	12%	23%	54%	34%	34%	46%	28%	6%	100%			
Incoming calls	124	32	42	50	25	36	28	28	31	30	11	10	20	83	31	30	41	22	6	124			
	57%	62%	61%	52%	67%	54%	56%	55%	42%	40%	44%	38%	41%	71%	42%	40%	41%	36%	45%	57%			
														hijlnopqs						hijnopq			
		26%	34%	41%	20%	29%	23%	23%	25%	24%	9%	8%	16%	67%	25%	24%	33%	18%	5%	100%			
Internet services	99	21	29	49	17	28	28	23	36	35	12	10	24	52	36	35	46	26	3	99			
	46%	42%	42%	50%	46%	42%	55%	45%	48%	46%	46%	41%	49%	45%	48%	46%	46%	42%	22%	46%			
		22%	29%	49%	17%	29%	29%	24%	36%	35%	12%	10%	24%	53%	36%	35%	47%	26%	3%	100%			
Outgoing calls	95	25	27	43	16	29	23	23	26	26	7	7	19	62	26	26	33	18	4	95			
	44%	50%	40%	44%	42%	43%	44%	44%	35%	35%	28%	29%	38%	53%	35%	35%	33%	30%	34%	44%			
														hijnopq						q			
		27%	29%	45%	17%	30%	24%	24%	27%	27%	7%	8%	20%	65%	27%	27%	35%	19%	5%	100%			
Calls between different sites	65	11	24	30	12	23	15	13	22	21	9	8	13	35	22	21	30	19	3	65			
	30%	21%	36%	31%	33%	34%	29%	26%	30%	28%	37%	32%	26%	30%	30%	28%	30%	31%	26%	30%			
		17%	37%	46%	19%	36%	23%	20%	34%	32%	14%	12%	20%	54%	34%	32%	46%	29%	5%	100%			
Data services	44	7	11	25	6	10	14	14	16	16	8	8	8	20	16	16	24	12	5	44			
	20%	14%	16%	26%	16%	15%	28%	27%	21%	21%	33%	33%	15%	17%	21%	21%	24%	20%	40%	20%			
		17%	25%	58%	14%	23%	32%	31%	36%	36%	19%	19%	17%	45%	36%	36%	55%	28%	12%	100%			
Security/alarm systems	35	3	12	20	1	11	12	11	19	21	4	7	14	10	19	21	25	15	4	35			
	16%	5%	18%	21%	4%	16%	24%	20%	25%	28%	18%	27%	29%	8%	25%	28%	25%	25%	31%	16%			
			a	d	d	d	d	d	m	ms			ms		m	ms	m	m					
		8%	35%	58%	4%	30%	35%	30%	53%	59%	13%	19%	40%	28%	53%	59%	72%	44%	11%	100%			
Card payments	34	5	15	14	8	11	7	8	10	9	4	3	6	21	10	9	13	7	2	34			
	16%	10%	22%	15%	20%	17%	14%	15%	14%	12%	18%	10%	12%	18%	14%	12%	13%	12%	18%	16%			
		15%	44%	41%	22%	33%	22%	23%	31%	25%	13%	8%	18%	62%	31%	25%	38%	21%	7%	100%			
Video conferencing	30	6	7	17	3	9	8	9	7	8	3	3	4	19	7	8	11	6	*	30			
	14%	11%	10%	18%	7%	13%	17%	17%	10%	11%	12%	13%	9%	17%	10%	11%	11%	9%	3%	14%			
		19%	24%	58%	9%	28%	28%	30%	25%	26%	10%	11%	15%	64%	25%	26%	36%	19%	1%	100%			

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s



# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 69**

**D3. Please rank the functions for which your company uses IP based services in order of importance? RANKED FIRST, SECOND OR THIRD MOST IMPORTANT FUNCTION (MULTI CODE)**

Base : Those who use IP-based alternatives

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION													
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30		IP NOT ISDN	ISDN2 & IP	ISDN30		IP SWITCHED	IP NOT SWITCHED	ANY IP		
					£1M	£1M-£20M	£21M-£100M	OVER				ONLY	BOTH ISDN			& IP	ISDN & IP					
Significance Level: 95%	a	b	c	d	e	f	g	h	i	j	*k	l	m	n	o	p	q	*r	s			
Unweighted total	218	38	57	122	30	62	57	62	91	85	33	27	58	100	91	85	118	67	16	218		
Effective Weighted Sample	197	36	56	115	27	58	53	58	75	84	20	27	57	97	75	84	102	58	14	197		
Total	216	51	68	97	38	67	51	52	74	74	25	25	49	116	74	74	100	61	13	216		
		24%	32%	45%	18%	31%	24%	24%	34%	34%	12%	12%	23%	54%	34%	34%	46%	28%	6%	100%		
Fax services	27	7	11	9	3	10	7	4	10	12	2	4	8	13	10	12	14	11	1	27		
	13%	13%	17%	10%	9%	15%	13%	8%	14%	16%	9%	15%	16%	11%	14%	16%	14%	17%	6%	13%		
		24%	42%	34%	12%	38%	25%	16%	37%	43%	8%	14%	29%	49%	37%	43%	51%	39%	3%	100%		
Don't know	3	1	-	2	-	-	1	1	2	2	*	-	2	1	2	2	2	1	-	3		
	2%	2%	-%	2%	-%	-%	2%	2%	3%	2%	2%	-%	3%	1%	3%	2%	2%	1%	-%	2%		
		39%	-%	61%	-%	-%	37%	24%	61%	49%	13%	-%	49%	39%	61%	49%	61%	24%	-%	100%		

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 69

D3. Please rank the functions for which your company uses IP based services in order of importance? RANKED FIRST, SECOND OR THIRD MOST IMPORTANT FUNCTION (MULTI CODE)

Base : Those who use IP-based alternatives

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	b	c	d	*e	f	*g	h	i	j	*k	l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	218	52	33	133	45	22	39	22	154	64	72	13	71	1	88	130	87	120
Effective Weighted Sample	197	41	32	125	40	16	38	22	141	57	61	12	60	1	80	118	79	110
Total	216	44	31	141	37	21	35	20	158	58	65	10	64	1	95	121	97	108
		20%	14%	65%	17%	10%	16%	9%	73%	27%	30%	5%	30%	*%	44%	56%	45%	50%
Incoming calls	124	18	10	96	18	5	12	7	101	23	26	2	26	-	50	74	59	59
	57%	41%	31%	68%	49%	26%	35%	35%	64%	40%	40%	16%	41%	-%	52%	61%	61%	54%
				ab					fi									
		15%	8%	78%	15%	4%	10%	5%	81%	19%	21%	1%	21%	-%	40%	60%	48%	47%
Internet services	99	15	14	70	13	10	15	6	78	21	25	3	25	-	39	60	45	50
	46%	33%	45%	50%	35%	50%	42%	31%	49%	36%	39%	30%	40%	-%	41%	50%	47%	46%
		15%	14%	71%	13%	10%	15%	6%	79%	21%	26%	3%	26%	-%	39%	61%	46%	50%
Outgoing calls	95	16	6	73	15	4	9	8	71	24	20	2	19	1	35	60	48	43
	44%	36%	20%	52%	42%	18%	25%	42%	45%	41%	31%	20%	30%	100%	37%	50%	49%	40%
				b					f									
		17%	7%	77%	16%	4%	9%	9%	75%	25%	21%	2%	20%	1%	37%	63%	50%	45%
Calls between different sites	65	15	7	43	10	7	12	2	44	21	21	1	21	-	30	35	31	32
	30%	34%	23%	30%	28%	36%	34%	9%	28%	36%	33%	8%	33%	-%	32%	29%	32%	30%
		23%	11%	66%	16%	11%	18%	3%	67%	33%	33%	1%	33%	-%	46%	54%	48%	49%
Data services	44	8	9	26	5	5	9	2	38	6	15	2	15	-	22	22	18	24
	20%	18%	30%	19%	15%	26%	27%	12%	24%	10%	23%	22%	24%	-%	23%	18%	18%	22%
							i		i									
		19%	21%	60%	12%	12%	21%	5%	87%	13%	35%	5%	35%	-%	49%	51%	40%	54%
Security/alarm systems	35	7	12	16	8	5	12	4	25	10	18	2	18	-	11	24	11	23
	16%	16%	40%	11%	22%	27%	34%	21%	16%	17%	27%	18%	27%	-%	12%	20%	11%	22%
			ac				h											
		20%	35%	45%	23%	16%	34%	12%	72%	28%	50%	5%	50%	-%	32%	68%	30%	67%
Card payments	34	6	4	24	4	4	5	2	25	9	9	2	9	-	19	15	19	14
	16%	14%	14%	17%	10%	21%	14%	9%	16%	16%	13%	18%	13%	-%	20%	13%	19%	13%
		18%	13%	69%	10%	12%	15%	5%	72%	28%	25%	5%	25%	-%	56%	44%	55%	41%
Video conferencing	30	4	2	24	5	-	3	1	22	8	6	-	6	-	13	17	12	16
	14%	9%	7%	17%	14%	-%	8%	5%	14%	14%	9%	-%	10%	-%	14%	14%	12%	15%
		13%	7%	80%	17%	-%	9%	3%	73%	27%	20%	-%	20%	-%	44%	56%	38%	55%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 69**

**D3. Please rank the functions for which your company uses IP based services in order of importance? RANKED FIRST, SECOND OR THIRD MOST IMPORTANT FUNCTION (MULTI CODE)**

Base : Those who use IP-based alternatives

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	b	c	d	*e	f	*g	h	i	j	*k	l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	218	52	33	133	45	22	39	22	154	64	72	13	71	1	88	130	87	120
Effective Weighted Sample	197	41	32	125	40	16	38	22	141	57	61	12	60	1	80	118	79	110
Total	216	44	31	141	37	21	35	20	158	58	65	10	64	1	95	121	97	108
		20%	14%	65%	17%	10%	16%	9%	73%	27%	30%	5%	30%	*%	44%	56%	45%	50%
Fax services	27	6	7	15	5	3	5	5	18	9	10	3	10	-	16	11	9	17
	13%	13%	22%	11%	14%	16%	13%	28%	12%	15%	15%	28%	15%	-%	17%	9%	10%	16%
		21%	25%	55%	19%	12%	17%	20%	67%	33%	35%	10%	35%	-%	60%	40%	34%	63%
Don't know	3	1	-	2	1	-	1	-	2	2	*	1	*	-	2	1	*	2
	2%	3%	-%	1%	3%	-%	2%	-%	1%	3%	1%	8%	1%	-%	2%	1%	*%	1%
		37%	-%	63%	37%	-%	24%	-%	51%	49%	13%	24%	13%	-%	63%	37%	13%	49%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 69**

**D3. Please rank the functions for which your company uses IP based services in order of importance? RANKED FIRST, SECOND OR THIRD MOST IMPORTANT FUNCTION (MULTI CODE)**

Base : Those who use IP-based alternatives

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%		*a	b	*c	d	*e	*f	*g	h	*i	*j	*k	l	m	n	o	p	q	r
Unweighted total	218	19	48	18	63	15	-	-	63	20	-	-	88	155	92	82	127	156	62
Effective Weighted Sample	197	18	40	15	53	14	-	-	53	18	-	-	77	143	85	74	116	140	57
Total	216	15	45	14	55	14	-	-	57	17	-	-	84	151	85	88	121	153	63
		7%	21%	7%	25%	7%	-%	-%	26%	8%	-%	-%	39%	70%	39%	41%	56%	71%	29%
Incoming calls	124	7	15	6	20	4	-	-	21	6	-	-	46	93	41	50	73	84	39
	57%	47%	33%	40%	37%	29%	-%	-%	37%	39%	-%	-%	54%	62%	49%	57%	61%	55%	63%
		6%	12%	5%	16%	3%	-%	-%	17%	5%	-%	-%	37%	75%	33%	40%	59%	68%	32%
Internet services	99	5	21	3	25	3	-	-	25	4	-	-	40	74	43	36	61	72	27
	46%	33%	45%	20%	45%	23%	-%	-%	44%	21%	-%	-%	47%	49%	50%	41%	50%	47%	43%
		5%	21%	3%	25%	3%	-%	-%	25%	4%	-%	-%	40%	75%	43%	37%	62%	73%	27%
Outgoing calls	95	7	10	4	16	3	-	-	16	6	-	-	37	71	30	35	60	64	31
	44%	48%	23%	30%	30%	22%	-%	-%	29%	35%	-%	-%	44%	47%	35%	39%	50%	42%	49%
		8%	11%	5%	17%	3%	-%	-%	17%	6%	-%	-%	39%	74%	31%	36%	63%	67%	33%
Calls between different sites	65	5	14	3	17	4	-	-	18	4	-	-	31	50	18	27	36	49	16
	30%	30%	31%	24%	31%	28%	-%	-%	31%	23%	-%	-%	37%	33%	21%	31%	30%	32%	25%
		7%	22%	5%	26%	6%	-%	-%	27%	6%	-%	-%	n 48%	n 77%	27%	42%	56%	76%	24%
Data services	44	2	11	5	11	5	-	-	14	2	-	-	22	36	17	15	27	33	11
	20%	10%	24%	36%	21%	36%	-%	-%	25%	15%	-%	-%	26%	23%	20%	17%	22%	22%	17%
		4%	24%	12%	26%	12%	-%	-%	33%	6%	-%	-%	49%	81%	39%	33%	61%	76%	24%
Security/alarm systems	35	2	14	4	15	3	-	-	15	4	-	-	18	27	17	15	20	30	5
	16%	10%	30%	28%	28%	22%	-%	-%	27%	24%	-%	-%	22%	18%	20%	17%	16%	19%	9%
		4%	39%	11%	44%	9%	-%	-%	44%	11%	-%	-%	52%	77%	48%	43%	56%	84%	16%
Card payments	34	2	5	3	6	2	-	-	7	3	-	-	15	24	19	19	15	25	9
	16%	13%	11%	23%	11%	11%	-%	-%	12%	16%	-%	-%	18%	16%	23%	21%	12%	16%	14%
		6%	15%	10%	18%	5%	-%	-%	21%	8%	-%	-%	45%	69%	56%	55%	44%	74%	26%
Video conferencing	30	1	5	*	3	3	-	-	6	-	-	-	8	20	13	5	23	19	11
	14%	5%	11%	3%	6%	20%	-%	-%	11%	-%	-%	-%	10%	13%	16%	6%	19%	13%	17%
		3%	16%	1%	11%	9%	-%	-%	20%	-%	-%	-%	27%	68%	44%	17%	76%	64%	36%
Columns Tested:	a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																		

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 69**

**D3. Please rank the functions for which your company uses IP based services in order of importance? RANKED FIRST, SECOND OR THIRD MOST IMPORTANT FUNCTION (MULTI CODE)**

Base : Those who use IP-based alternatives

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
								UP TO							UP TO	OVER			
	LAST YEAR	EVER	NEVER	YES	NO	YES	NO/DK	3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	2 YEARS	2 YEARS	YES	NO/DK	
Significance Level: 95%	*a	b	*c	d	*e	*f	*g	h	*i	*j	*k	l	m	n	o	p	q	r	
Unweighted total	218	19	48	18	63	15	-	-	63	20	-	-	88	155	92	82	127	156	62
Effective Weighted Sample	197	18	40	15	53	14	-	-	53	18	-	-	77	143	85	74	116	140	57
Total	216	15	45	14	55	14	-	-	57	17	-	-	84	151	85	88	121	153	63
		7%	21%	7%	25%	7%	-%	-%	26%	8%	-%	-%	39%	70%	39%	41%	56%	71%	29%
Fax services	27	2	8	2	8	2	-	-	10	3	-	-	11	17	13	14	12	20	8
	13%	15%	18%	13%	16%	13%	-%	-%	17%	17%	-%	-%	14%	12%	15%	16%	10%	13%	12%
		8%	30%	7%	31%	7%	-%	-%	35%	10%	-%	-%	42%	64%	47%	52%	44%	72%	28%
Don't know	3	-	1	*	1	-	-	-	1	-	-	-	-	1	-	1	1	2	
	2%	-%	2%	3%	2%	-%	-%	-%	5%	-%	-%	-%	-%	1%	-%	1%	1%	4%	
		-%	24%	13%	37%	-%	-%	-%	24%	-%	-%	-%	-%	39%	-%	24%	24%	76%	

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 70**

## **D4. Does your company have a switch i.e. PBX or PABX? (SINGLE CODE)**

Base : Those who use IP-based alternatives and do not mostly use an ISDN service

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											ANY IP
	Total	1-49	50-249	250+	UNDER £1M	£1M- £20M	£21M-£10 0M	OVER £100M	ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP SWITCHED ISDN	IP NOT SWITCHED ISDN	
Significance Level: 95%		*a	b	c	*d	e	f	g	*h	*i	*j	*k	*l	m	*n	*o	p	*q	*r	s
Unweighted total	133	28	32	72	23	42	31	31	24	24	9	9	15	100	24	24	33	-	-	133
Effective Weighted Sample	125	28	32	69	22	40	29	30	22	24	7	9	15	97	22	24	30	-	-	125
Total	141	37	41	63	29	48	29	28	17	20	5	8	12	116	17	20	25	-	-	141
		27%	29%	45%	20%	34%	21%	20%	12%	14%	3%	6%	9%	83%	12%	14%	17%	-%	-%	100%
Yes	79	12	29	39	11	24	25	19	12	15	3	6	9	61	12	15	18	-	-	79
	56%	31%	71%	61%	39%	51%	87%	67%	71%	76%	65%	80%	74%	52%	71%	76%	74%	-%	-%	56%
		15%	36%	49%	14%	31%	32%	24%	15%	19%	4%	8%	11%	77%	15%	19%	23%	-%	-%	100%
No	38	15	5	18	8	18	4	4	3	2	1	1	2	34	3	2	4	-	-	38
	27%	40%	13%	28%	28%	38%	13%	14%	17%	12%	26%	10%	13%	29%	17%	12%	15%	-%	-%	27%
		40%	14%	47%	21%	49%	10%	11%	8%	6%	3%	2%	4%	90%	8%	6%	10%	-%	-%	100%
Don't know	24	11	6	7	10	5	-	5	2	2	*	1	2	21	2	2	3	-	-	24
	17%	29%	16%	11%	33%	11%	-%	19%	12%	12%	9%	10%	13%	18%	12%	12%	11%	-%	-%	17%
		45%	27%	28%	40%	22%	-%	22%	8%	10%	2%	3%	7%	88%	8%	10%	12%	-%	-%	100%
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																				

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 70

## D4. Does your company have a switch i.e. PBX or PABX? (SINGLE CODE)

Base : Those who use IP-based alternatives and do not mostly use an ISDN service

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		*a	*b	c	*d	*e	*f	*g	h	i	*j	*k	*l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	133	-	-	133	-	-	-	-	102	31	-	-	-	-	52	81	65	57
Effective Weighted Sample	125	-	-	125	-	-	-	-	97	28	-	-	-	-	50	75	62	53
Total	141	-	-	141	-	-	-	-	110	31	-	-	-	-	60	81	76	54
		-%	-%	100%	-%	-%	-%	-%	78%	22%	-%	-%	-%	-%	42%	58%	54%	38%
Yes	79	-	-	79	-	-	-	-	65	14	-	-	-	-	36	43	38	38
	56%	-%	-%	56%	-%	-%	-%	-%	59%	45%	-%	-%	-%	-%	60%	53%	50%	70%
		-%	-%	100%	-%	-%	-%	-%	83%	17%	-%	-%	-%	-%	45%	55%	48%	p
No	38	-	-	38	-	-	-	-	23	14	-	-	-	-	16	22	24	13
	27%	-%	-%	27%	-%	-%	-%	-%	21%	46%	-%	-%	-%	-%	26%	27%	32%	24%
		-%	-%	100%	-%	-%	-%	-%	62%	38%	-%	-%	-%	-%	42%	58%	65%	35%
Don't know	24	-	-	24	-	-	-	-	21	3	-	-	-	-	8	16	13	3
	17%	-%	-%	17%	-%	-%	-%	-%	19%	9%	-%	-%	-%	-%	13%	20%	17%	6%
		-%	-%	100%	-%	-%	-%	-%	88%	12%	-%	-%	-%	-%	33%	67%	55%	12%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 70

## D4. Does your company have a switch i.e. PBX or PABX? (SINGLE CODE)

Base : Those who use IP-based alternatives and do not mostly use an ISDN service

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
	NEVER			YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
	LAST YEAR	EVER	/DK															
Significance Level: 95%	*a	*b	*c	*d	*e	*f	*g	*h	*i	*j	*k	l	m	n	o	p	q	r
Unweighted total	133	-	-	-	-	-	-	-	-	-	-	44	96	47	48	77	94	39
Effective Weighted Sample	125	-	-	-	-	-	-	-	-	-	-	41	90	45	47	72	88	37
Total	141	-	-	-	-	-	-	-	-	-	-	44	102	47	55	79	98	43
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	32%	72%	34%	39%	56%	69%	31%
Yes	79	-	-	-	-	-	-	-	-	-	-	31	56	32	31	47	64	15
	56%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	70%	55%	67%	56%	60%	66%	35%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	39%	71%	40%	39%	60%	81%	19%
No	38	-	-	-	-	-	-	-	-	-	-	10	31	11	14	24	22	15
	27%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	22%	31%	22%	25%	30%	23%	36%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	26%	83%	28%	36%	62%	59%	41%
Don't know	24	-	-	-	-	-	-	-	-	-	-	4	14	5	11	8	11	13
	17%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	9%	14%	10%	19%	10%	11%	30%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	16%	59%	20%	45%	34%	46%	54%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r



# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 71

D5. Have any of the following previously acted as a trigger for moving (from ISDN2/2e or ISDN30) to IP-based services for your organisation? (MULTI CODE)

Base : Those who use IP-based alternatives

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION												IP SWITCHED	IP NOT SWITCHED	ANY IP
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP						
					£1M	£1M-£20M	£21M-£100M	OVER £100M															
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	*k	l	m	n	o	p	q	*r	s			
Unweighted total	218	38	57	122	30	62	57	62	91	85	33	27	58	100	91	85	118	67	16	218			
Effective Weighted Sample	197	36	56	115	27	58	53	58	75	84	20	27	57	97	75	84	102	58	14	197			
Total	216	51	68	97	38	67	51	52	74	74	25	25	49	116	74	74	100	61	13	216			
		24%	32%	45%	18%	31%	24%	24%	34%	34%	12%	12%	23%	54%	34%	34%	46%	28%	6%	100%			
Part of general upgrade	126	24	37	66	20	35	33	37	48	48	16	16	32	62	48	48	64	39	8	126			
	58%	46%	54%	68%	53%	51%	65%	72%	64%	64%	63%	64%	65%	54%	64%	64%	64%	64%	60%	58%			
		19%	29%	52%	16%	27%	26%	30%	38%	38%	13%	13%	25%	49%	38%	38%	51%	31%	6%	100%			
Changed supplier	82	13	28	41	16	17	27	20	36	42	5	11	31	35	36	42	46	38	2	82			
	38%	26%	41%	42%	43%	25%	54%	38%	48%	56%	19%	43%	63%	30%	48%	56%	47%	63%	14%	38%			
				a			e		jm	jms			jmps		jm	jms	jm	jms					
		16%	34%	50%	20%	20%	33%	24%	44%	51%	6%	13%	38%	43%	44%	51%	57%	46%	2%	100%			
Switch replacement	76	8	29	39	6	27	23	20	35	38	9	12	26	29	35	38	48	35	4	76			
	35%	16%	42%	41%	16%	40%	45%	39%	48%	51%	37%	48%	53%	25%	48%	51%	48%	57%	29%	35%			
			a	a		d	d	d	m	ms			ms		m	ms	ms	ms					
		11%	38%	52%	8%	35%	30%	27%	46%	50%	12%	16%	34%	38%	46%	50%	62%	45%	5%	100%			
Other trigger	3	3	-	-	2	1	-	-	1	2	-	1	1	1	1	2	2	2	-	3			
	2%	7%	-%	-%	6%	2%	-%	-%	1%	3%	-%	4%	2%	1%	1%	3%	2%	3%	-%	2%			
		c																					
		100%	-%	-%	63%	37%	-%	-%	29%	63%	-%	33%	29%	37%	29%	63%	63%	63%	-%	100%			
We've only ever had IP based services/ we have not moved services	32	15	8	10	8	15	3	2	9	4	5	-	4	23	9	4	9	5	2	32			
	15%	29%	12%	10%	21%	22%	7%	4%	12%	6%	18%	-%	8%	20%	12%	6%	9%	9%	14%	15%			
		bc			g	fg								iop						io			
		46%	25%	30%	25%	45%	10%	7%	27%	13%	14%	-%	13%	73%	27%	13%	27%	17%	6%	100%			
Don't know	9	-	5	4	-	2	*	5	4	3	2	1	2	5	4	3	5	-	3	9			
	4%	-%	7%	5%	-%	3%	1%	10%	5%	4%	9%	3%	4%	4%	5%	4%	5%	-%	20%	4%			
							f				q												
		-%	53%	47%	-%	25%	4%	57%	43%	28%	24%	8%	19%	49%	43%	28%	51%	-%	28%	100%			
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																							

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 71

D5. Have any of the following previously acted as a trigger for moving (from ISDN2/2e or ISDN30) to IP-based services for your organisation? (MULTI CODE)

Base : Those who use IP-based alternatives

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
Significance Level: 95%		a	b	c	d	*e	f	*g	h	i	j	*k	l	*m	n	o	p	q
Unweighted total	218	52	33	133	45	22	39	22	154	64	72	13	71	1	88	130	87	120
Effective Weighted Sample	197	41	32	125	40	16	38	22	141	57	61	12	60	1	80	118	79	110
Total	216	44	31	141	37	21	35	20	158	58	65	10	64	1	95	121	97	108
		20%	14%	65%	17%	10%	16%	9%	73%	27%	30%	5%	30%	*%	44%	56%	45%	50%
Part of general upgrade	126	28	19	80	22	13	25	9	97	29	43	4	42	1	47	80	48	75
	58%	63%	61%	57%	60%	66%	72%	48%	62%	50%	66%	38%	65%	100%	49%	66%	49%	69%
							i									n		p
		22%	15%	63%	18%	11%	20%	7%	77%	23%	34%	3%	33%	1%	37%	63%	38%	59%
Changed supplier	82	21	19	42	20	11	23	13	55	27	33	6	33	1	45	37	31	50
	38%	48%	61%	30%	54%	52%	65%	65%	35%	46%	52%	62%	51%	100%	47%	31%	32%	46%
		c	c		h		h								o			
		26%	23%	51%	24%	13%	28%	16%	67%	33%	41%	8%	40%	1%	55%	45%	37%	61%
Switch replacement	76	23	16	38	20	10	23	8	58	18	37	2	36	1	35	42	25	51
	35%	51%	51%	27%	54%	47%	66%	40%	37%	31%	57%	18%	56%	100%	36%	35%	25%	47%
		c	c		i		hi										p	
		30%	21%	50%	26%	13%	30%	10%	76%	24%	48%	2%	47%	1%	45%	55%	32%	67%
Other trigger	3	-	2	1	-	1	1	1	2	1	2	-	2	-	2	1	2	-
	2%	-%	7%	1%	-%	5%	3%	5%	2%	2%	3%	-%	3%	-%	2%	1%	2%	-%
			c															
		-%	63%	37%	-%	29%	33%	29%	71%	29%	63%	-%	63%	-%	63%	37%	63%	-%
We've only ever had IP based services/ we have not moved services	32	5	2	25	4	3	-	3	26	7	7	*	7	-	18	14	23	7
	15%	12%	6%	18%	11%	15%	-%	13%	16%	11%	10%	4%	11%	-%	19%	12%	24%	6%
					f				f	f							q	
		17%	6%	78%	12%	10%	-%	8%	80%	20%	21%	1%	21%	-%	56%	44%	71%	20%
Don't know	9	2	2	5	2	1	1	1	5	4	3	1	3	-	1	8	4	3
	4%	5%	6%	4%	6%	5%	2%	5%	3%	7%	4%	14%	4%	-%	1%	7%	4%	3%
		24%	19%	57%	24%	11%	8%	11%	54%	46%	28%	15%	28%	-%	11%	89%	44%	32%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 71

D5. Have any of the following previously acted as a trigger for moving (from ISDN2/2e or ISDN30) to IP-based services for your organisation? (MULTI CODE)

Base : Those who use IP-based alternatives

	SWITCHING ISDN SUPPLIER				CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%		*a	b	*c	d	*e	*f	*g	h	*i	*j	*k	l	m	n	o	p	q	r
Unweighted total	218	19	48	18	63	15	-	-	63	20	-	-	88	155	92	82	127	156	62
Effective Weighted Sample	197	18	40	15	53	14	-	-	53	18	-	-	77	143	85	74	116	140	57
Total	216	15	45	14	55	14	-	-	57	17	-	-	84	151	85	88	121	153	63
		7%	21%	7%	25%	7%	-%	-%	26%	8%	-%	-%	39%	70%	39%	41%	56%	71%	29%
Part of general upgrade	126	11	27	8	36	9	-	-	38	9	-	-	58	93	57	51	73	98	28
	58%	75%	60%	54%	66%	61%	-%	-%	66%	51%	-%	-%	69%	62%	67%	58%	61%	64%	45%
		9%	22%	6%	28%	7%	-%	-%	30%	7%	-%	-%	46%	74%	46%	40%	58%	78%	22%
Changed supplier	82	9	29	2	36	3	-	-	31	8	-	-	37	60	46	40	40	59	23
	38%	61%	63%	13%	66%	21%	-%	-%	55%	51%	-%	-%	44%	40%	54%	45%	33%	39%	36%
		11%	35%	2%	44%	4%	-%	-%	38%	10%	-%	-%	46%	73%	56%	49%	49%	72%	28%
Switch replacement	76	13	22	4	31	4	-	-	31	7	-	-	44	58	43	34	42	60	17
	35%	83%	49%	26%	57%	28%	-%	-%	55%	44%	-%	-%	52%	39%	50%	39%	35%	39%	26%
		17%	29%	5%	41%	5%	-%	-%	41%	10%	-%	-%	57%	76%	56%	45%	55%	78%	22%
Other trigger	3	-	2	-	2	-	-	-	2	-	-	-	1	2	1	2	1	3	-
	2%	-%	5%	-%	4%	-%	-%	-%	4%	-%	-%	-%	1%	1%	1%	2%	1%	2%	-%
		-%	63%	-%	63%	-%	-%	-%	63%	-%	-%	-%	37%	63%	29%	63%	37%	100%	-%
We've only ever had IP based services/ we have not moved services	32	-	5	2	4	3	-	-	5	2	-	-	7	26	7	11	20	17	15
	15%	-%	12%	13%	8%	19%	-%	-%	9%	13%	-%	-%	8%	17%	9%	13%	17%	11%	24%
		-%	17%	6%	14%	9%	-%	-%	16%	7%	-%	-%	22%	81%	23%	35%	62%	53%	47%
Don't know	9	-	-	4	*	1	-	-	-	3	-	-	-	4	1	-	7	4	5
	4%	-%	-%	28%	1%	10%	-%	-%	-%	17%	-%	-%	-%	3%	2%	-%	6%	3%	8%
		-%	-%	43%	4%	15%	-%	-%	-%	30%	-%	-%	-%	44%	14%	-%	73%	48%	52%
Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																			

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 72**

**D7. Which supplier(s) do you use for your use for IP-based services? (MULTI CODE)**

Base : Those who use IP-based alternatives

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											IP SWITCHED	IP NOT SWITCHED	ANY IP
	Total	UNDER			£1M- £20M	OVER			ISDN2	ISDN30		ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP				
		1-49	50-249	250+		£1M	£21M-£10	£10M		£100M	i								j			
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q	r	s		
Unweighted total	218	38	57	122	30	62	57	62	91	85	33	27	58	100	91	85	118	67	16	218		
Effective Weighted Sample	197	36	56	115	27	58	53	58	75	84	20	27	57	97	75	84	102	58	14	197		
Total	216	51	68	97	38	67	51	52	74	74	25	25	49	116	74	74	100	61	13	216		
		24%	32%	45%	18%	31%	24%	24%	34%	34%	12%	12%	23%	54%	34%	34%	46%	28%	6%	100%		
BT	110	19	35	56	10	31	33	32	36	40	10	14	26	60	36	40	50	33	5	110		
	51%	38%	51%	57%	28%	46%	65%	61%	49%	54%	40%	56%	53%	51%	49%	54%	51%	55%	36%	51%		
				a			de	d														
		18%	32%	51%	10%	28%	30%	29%	33%	37%	9%	13%	24%	54%	33%	37%	46%	30%	4%	100%		
Virgin Media (incl. NTL:Telewest)	60	13	22	25	14	18	14	13	27	22	11	6	16	27	27	22	32	24	5	60		
	28%	25%	32%	26%	37%	27%	28%	25%	36%	29%	43%	23%	32%	23%	36%	29%	33%	40%	37%	28%		
				a			e	e		jms			jms			jms		m				
		21%	36%	43%	24%	30%	24%	22%	44%	36%	18%	10%	26%	46%	44%	36%	54%	41%	8%	100%		
Vodafone (inc. Cable & Wireless)	44	3	16	25	6	6	16	15	19	24	2	7	18	18	19	24	26	13	4	44		
	20%	6%	23%	26%	16%	9%	31%	28%	26%	33%	7%	27%	36%	15%	26%	33%	26%	22%	29%	20%		
			a	a			e	e		jms			jms			jms						
		6%	36%	58%	14%	14%	36%	33%	44%	55%	4%	15%	40%	41%	44%	55%	59%	30%	9%	100%		
Colt Communications	39	7	9	23	6	7	12	14	26	23	6	3	20	10	26	23	28	22	3	39		
	18%	13%	14%	24%	17%	10%	23%	26%	35%	31%	23%	11%	41%	9%	35%	31%	29%	36%	23%	18%		
				a			e	e	ms	ms			ms		ms	ms	ms	ms		m		
		17%	24%	59%	16%	18%	31%	35%	66%	59%	15%	7%	51%	26%	66%	59%	74%	57%	8%	100%		
AT&T	34	1	17	15	5	6	13	10	23	21	5	4	17	7	23	21	27	21	1	34		
	16%	2%	25%	16%	12%	9%	26%	19%	30%	29%	21%	16%	35%	6%	30%	29%	27%	35%	6%	16%		
			a	a			e		ms	ms	m		ms		ms	ms	ms	ms		m		
		3%	52%	45%	14%	18%	39%	29%	67%	63%	16%	12%	51%	20%	67%	63%	80%	62%	2%	100%		
Daisy Communications	32	8	11	13	5	8	8	11	21	22	5	6	16	5	21	22	27	21	3	32		
	15%	15%	16%	13%	13%	11%	16%	21%	28%	30%	18%	23%	33%	4%	28%	30%	27%	35%	25%	15%		
				a			e		ms	ms	m		ms		ms	ms	ms	ms		m		
		24%	35%	41%	15%	24%	25%	35%	66%	69%	15%	18%	51%	16%	66%	69%	84%	66%	10%	100%		
KCOM (incl. Kingston Communications & Affiniti)	28	8	7	13	7	9	4	9	19	13	9	2	10	7	19	13	21	17	2	28		
	13%	16%	11%	13%	18%	13%	9%	17%	26%	17%	34%	8%	21%	6%	26%	17%	21%	27%	17%	13%		
				a			e		ms	m	ms		m		ms	m	m	ms				
		29%	26%	45%	24%	31%	15%	30%	67%	44%	30%	7%	37%	26%	67%	44%	74%	58%	8%	100%		
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																						

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 72**

**D7. Which supplier(s) do you use for your use for IP-based services? (MULTI CODE)**

Base : Those who use IP-based alternatives

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION												
	Total	UNDER			£1M- £20M	£21M-£100M	OVER £100M	ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP SWITCHED		IP NOT SWITCHED		ANY IP
		1-49	50-249	250+													ISDN	ISDN			
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	*k	l	m	n	o	p	q	*r	s	
Unweighted total	218	38	57	122	30	62	57	62	91	85	33	27	58	100	91	85	118	67	16	218	
Effective Weighted Sample	197	36	56	115	27	58	53	58	75	84	20	27	57	97	75	84	102	58	14	197	
Total	216	51	68	97	38	67	51	52	74	74	25	25	49	116	74	74	100	61	13	216	
		24%	32%	45%	18%	31%	24%	24%	34%	34%	12%	12%	23%	54%	34%	34%	46%	28%	6%	100%	
Unicom	28	5	10	14	1	11	7	9	15	16	5	6	10	7	15	16	21	13	4	28	
	13%	10%	14%	14%	3%	16%	14%	18%	20%	21%	22%	24%	20%	6%	20%	21%	21%	21%	28%	13%	
									m	m	m		m		m	m	m	m			
		18%	34%	49%	4%	38%	26%	32%	54%	56%	19%	21%	35%	25%	54%	56%	75%	45%	13%	100%	
Opal Communications	23	3	9	11	3	4	10	6	14	20	-	6	14	3	14	20	20	15	1	23	
	11%	6%	12%	12%	8%	6%	20%	11%	18%	27%	-%	24%	28%	3%	18%	27%	20%	24%	6%	11%	
							e		jm	jms		-%	jms		jm	jms	jms	jms		m	
		13%	37%	50%	13%	19%	44%	24%	59%	86%	-%	27%	59%	14%	59%	86%	86%	64%	3%	100%	
TalkTalk	20	3	9	8	5	2	5	8	11	10	1	1	9	9	11	10	12	6	2	20	
	9%	6%	14%	9%	14%	3%	10%	15%	15%	14%	6%	4%	19%	7%	15%	14%	12%	11%	17%	9%	
							e						ms								
		14%	46%	41%	26%	11%	24%	39%	53%	51%	7%	5%	46%	42%	53%	51%	58%	32%	11%	100%	
XLN	13	2	5	6	1	3	3	5	7	8	*	1	7	5	7	8	8	6	1	13	
	6%	5%	7%	6%	3%	4%	6%	9%	10%	10%	2%	4%	14%	4%	10%	10%	8%	9%	6%	6%	
													m								
		18%	37%	45%	8%	23%	24%	36%	53%	58%	3%	8%	50%	39%	53%	58%	61%	43%	6%	100%	
Global Crossing	12	-	4	8	-	1	7	5	7	10	-	3	7	2	7	10	10	8	1	12	
	6%	-%	6%	9%	-%	1%	13%	9%	10%	14%	-%	12%	15%	2%	10%	14%	10%	13%	6%	6%	
							e		m	ms			ms		m	ms	m	m			
		-%	33%	67%	-%	8%	54%	38%	59%	84%	-%	25%	59%	16%	59%	84%	84%	65%	6%	100%	
MCI	10	1	2	6	-	1	2	6	7	7	2	1	6	1	7	7	8	5	2	10	
	4%	3%	3%	6%	-%	2%	4%	12%	10%	9%	7%	4%	11%	1%	10%	9%	8%	8%	17%	4%	
							e		m	m			m		m	m	m	m			
		14%	24%	61%	-%	15%	22%	63%	76%	68%	19%	11%	57%	13%	76%	68%	87%	48%	23%	100%	
Spitfire	9	2	1	6	3	1	2	3	8	8	*	-	8	1	8	8	8	7	1	9	
	4%	4%	2%	6%	8%	2%	4%	6%	11%	11%	2%	-%	16%	1%	11%	11%	8%	11%	6%	4%	
									ms	ms			ms		ms	ms	m	m			
		23%	11%	66%	31%	15%	20%	34%	89%	85%	4%	-%	85%	11%	89%	85%	89%	72%	8%	100%	
Columns Tested:	a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																				

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 72**

**D7. Which supplier(s) do you use for your use for IP-based services? (MULTI CODE)**

Base : Those who use IP-based alternatives

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											IP NOT SWITCHED	IP NOT SWITCHED	ANY IP
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN	ISDN				
					£1M	£1M-£20M	£21M-£100M	OVER £100M														
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	*k	l	m	n	o	p	q	*r	s		
Unweighted total	218	38	57	122	30	62	57	62	91	85	33	27	58	100	91	85	118	67	16	218		
Effective Weighted Sample	197	36	56	115	27	58	53	58	75	84	20	27	57	97	75	84	102	58	14	197		
Total	216	51	68	97	38	67	51	52	74	74	25	25	49	116	74	74	100	61	13	216		
		24%	32%	45%	18%	31%	24%	24%	34%	34%	12%	12%	23%	54%	34%	34%	46%	28%	6%	100%		
Other	7	5	1	1	3	2	2	-	-	3	-	3	-	4	-	3	3	-	1	7		
	3%	10%	2%	1%	7%	4%	4%	-%	-%	4%	-%	11%	-%	4%	-%	4%	3%	-%	8%	3%		
		c			g																	
		74%	15%	11%	40%	34%	26%	-%	-%	40%	-%	40%	-%	60%	-%	40%	40%	-%	14%	100%		
Don't Know	7	1	2	3	-	4	1	1	2	3	*	1	2	4	2	3	3	-	-	7		
	3%	3%	3%	3%	-%	6%	2%	2%	3%	4%	2%	3%	4%	3%	3%	4%	3%	-%	-%	3%		
		21%	35%	44%	-%	57%	12%	12%	33%	39%	6%	12%	27%	55%	33%	39%	45%	-%	-%	100%		

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 72

D7. Which supplier(s) do you use for your use for IP-based services? (MULTI CODE)

Base : Those who use IP-based alternatives

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30		ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
Significance Level: 95%		a	b	c	d	*e	f	*g	h	i	j	*k	l	*m	n	o	p	q
Unweighted total	218	52	33	133	45	22	39	22	154	64	72	13	71	1	88	130	87	120
Effective Weighted Sample	197	41	32	125	40	16	38	22	141	57	61	12	60	1	80	118	79	110
Total	216	44	31	141	37	21	35	20	158	58	65	10	64	1	95	121	97	108
		20%	14%	65%	17%	10%	16%	9%	73%	27%	30%	5%	30%	*%	44%	56%	45%	50%
BT	110	22	16	72	23	5	23	8	88	22	35	3	35	1	47	63	43	63
	51%	50%	52%	51%	62%	24%	65%	39%	56%	38%	55%	26%	54%	100%	49%	52%	44%	58%
		20%	15%	65%	21%	4%	21%	7%	80%	20%	32%	2%	32%	1%	43%	57%	39%	57%
Virgin Media (incl. NTL:Telewest)	60	17	12	30	15	10	13	7	43	16	28	2	28	-	31	29	25	34
	28%	40%	40%	21%	40%	47%	36%	34%	27%	28%	43%	20%	43%	-%	32%	24%	26%	31%
		c	c															
		29%	20%	50%	25%	16%	21%	11%	72%	28%	46%	3%	46%	-%	51%	49%	42%	56%
Vodafone (inc. Cable & Wireless)	44	7	11	27	9	3	12	3	36	8	16	2	16	-	17	27	13	30
	20%	15%	34%	19%	23%	17%	35%	16%	23%	14%	24%	16%	24%	-%	17%	23%	14%	28%
		15%	24%	61%	20%	8%	28%	7%	82%	18%	35%	4%	35%	-%	38%	62%	30%	68%
Colt Communications	39	19	6	14	15	7	12	8	31	8	23	2	23	1	13	26	11	27
	18%	42%	21%	10%	40%	36%	33%	40%	20%	13%	36%	16%	35%	100%	13%	21%	12%	25%
		c			hi		i										p	
		48%	17%	35%	39%	19%	30%	20%	80%	20%	61%	4%	59%	2%	33%	67%	29%	71%
AT&T	34	10	12	11	9	9	13	6	24	9	21	1	21	-	18	16	9	25
	16%	22%	40%	8%	25%	42%	37%	31%	16%	16%	33%	10%	33%	-%	19%	13%	9%	23%
		c	c				hi										p	
		29%	37%	34%	28%	26%	39%	18%	73%	27%	63%	3%	63%	-%	53%	47%	26%	74%
Daisy Communications	32	16	9	7	16	3	13	7	25	6	22	2	22	-	13	19	6	25
	15%	35%	28%	5%	43%	16%	36%	36%	16%	11%	35%	18%	35%	-%	14%	15%	7%	23%
		c	c		hi		hi										p	
		49%	27%	23%	51%	10%	40%	22%	80%	20%	71%	6%	71%	-%	41%	59%	20%	80%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 72**

**D7. Which supplier(s) do you use for your use for IP-based services? (MULTI CODE)**

Base : Those who use IP-based alternatives

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	b	c	d	*e	f	*g	h	i	j	*k	l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	218	52	33	133	45	22	39	22	154	64	72	13	71	1	88	130	87	120
Effective Weighted Sample	197	41	32	125	40	16	38	22	141	57	61	12	60	1	80	118	79	110
Total	216	44	31	141	37	21	35	20	158	58	65	10	64	1	95	121	97	108
		20%	14%	65%	17%	10%	16%	9%	73%	27%	30%	5%	30%	*%	44%	56%	45%	50%
KCOM (incl. Kingston Communications & Affiniti)	28	15	4	10	9	8	6	4	23	6	18	1	18	-	13	15	9	18
	13%	34%	12%	7%	23%	39%	17%	21%	14%	10%	28%	8%	28%	-%	14%	13%	10%	17%
		bc																
		53%	13%	34%	30%	28%	21%	15%	80%	20%	63%	3%	63%	-%	47%	53%	33%	63%
Unicom	28	9	8	12	7	4	8	3	22	6	15	2	15	-	13	15	5	23
	13%	19%	25%	8%	19%	20%	22%	17%	14%	10%	22%	18%	23%	-%	14%	12%	6%	21%
		c															p	
		31%	28%	42%	25%	14%	27%	12%	79%	21%	52%	6%	52%	-%	47%	53%	19%	81%
Opal Communications	23	5	11	7	5	6	10	5	15	8	15	1	15	-	10	13	8	15
	11%	11%	34%	5%	13%	27%	30%	27%	10%	14%	23%	8%	23%	-%	10%	11%	8%	14%
			ac				h											
		22%	46%	32%	22%	24%	45%	23%	65%	35%	64%	3%	64%	-%	43%	57%	34%	66%
TalkTalk	20	4	5	12	6	2	6	1	18	2	9	-	9	-	9	12	5	14
	9%	9%	16%	8%	16%	9%	19%	4%	11%	4%	13%	-%	14%	-%	9%	10%	5%	13%
					i		i											
		18%	24%	58%	29%	9%	32%	4%	89%	11%	42%	-%	42%	-%	42%	58%	25%	71%
XLN	13	5	2	7	3	2	3	3	10	3	7	-	7	-	5	8	4	8
	6%	11%	6%	5%	9%	11%	10%	14%	7%	5%	10%	-%	10%	-%	6%	7%	4%	8%
		35%	14%	51%	24%	18%	26%	20%	79%	21%	49%	-%	49%	-%	40%	60%	28%	62%
Global Crossing	12	4	5	4	3	3	6	2	10	3	9	-	9	-	3	9	-	12
	6%	9%	16%	3%	9%	13%	19%	12%	6%	5%	14%	-%	14%	-%	3%	8%	-%	11%
			c				hi										p	
		32%	40%	29%	25%	21%	52%	19%	77%	23%	71%	-%	71%	-%	25%	75%	-%	100%
MCI	10	4	3	3	5	1	3	2	8	1	7	-	7	-	5	5	-	10
	4%	9%	8%	2%	12%	6%	9%	9%	5%	2%	10%	-%	11%	-%	5%	4%	-%	9%
		c															p	
		43%	27%	30%	47%	12%	33%	19%	85%	15%	70%	-%	70%	-%	51%	49%	-%	100%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		



# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 72

D7. Which supplier(s) do you use for your use for IP-based services? (MULTI CODE)

Base : Those who use IP-based alternatives

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30		ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
Significance Level: 95%		a	b	c	d	*e	f	*g	h	i	j	*k	l	*m	n	o	p	q
Unweighted total	218	52	33	133	45	22	39	22	154	64	72	13	71	1	88	130	87	120
Effective Weighted Sample	197	41	32	125	40	16	38	22	141	57	61	12	60	1	80	118	79	110
Total	216	44	31	141	37	21	35	20	158	58	65	10	64	1	95	121	97	108
		20%	14%	65%	17%	10%	16%	9%	73%	27%	30%	5%	30%	*%	44%	56%	45%	50%
Spitfire	9	4	4	2	3	4	3	4	7	2	7	1	7	-	3	6	3	6
	4%	9%	12%	1%	9%	20%	10%	19%	5%	4%	10%	8%	10%	-%	3%	5%	3%	6%
		c	c															
		42%	39%	19%	37%	44%	37%	40%	76%	24%	72%	8%	72%	-%	34%	66%	31%	69%
Other	7	-	1	6	-	-	1	-	6	1	1	-	1	-	1	6	5	1
	3%	-%	3%	4%	-%	-%	3%	-%	4%	2%	2%	-%	2%	-%	1%	5%	5%	1%
		-%	14%	86%	-%	-%	14%	-%	86%	14%	14%	-%	14%	-%	20%	80%	74%	11%
Don't Know	7	-	1	6	-	1	-	1	6	1	-	1	-	-	1	5	2	2
	3%	-%	3%	4%	-%	5%	-%	5%	4%	1%	-%	10%	-%	-%	1%	4%	3%	2%
		-%	15%	85%	-%	15%	-%	15%	88%	12%	-%	15%	-%	-%	21%	79%	36%	30%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 72

## D7. Which supplier(s) do you use for your use for IP-based services? (MULTI CODE)

Base : Those who use IP-based alternatives

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
	Total	NEVER			YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
		LAST YEAR	EVER	/DK															
Significance Level: 95%		*a	b	*c	d	*e	*f	*g	h	*i	*j	*k	l	m	n	o	p	q	r
Unweighted total	218	19	48	18	63	15	-	-	63	20	-	-	88	155	92	82	127	156	62
Effective Weighted Sample	197	18	40	15	53	14	-	-	53	18	-	-	77	143	85	74	116	140	57
Total	216	15	45	14	55	14	-	-	57	17	-	-	84	151	85	88	121	153	63
		7%	21%	7%	25%	7%	-%	-%	26%	8%	-%	-%	39%	70%	39%	41%	56%	71%	29%
BT	110	11	22	5	29	6	-	-	33	5	-	-	53	84	50	36	73	80	29
	51%	73%	49%	32%	53%	39%	-%	-%	58%	30%	-%	-%	63%	56%	59%	41%	60%	53%	47%
		10%	20%	4%	26%	5%	-%	-%	30%	5%	-%	-%	48%	76%	45%	33%	66%	73%	27%
Virgin Media (incl. NTL:Telewest)	60	4	20	5	23	4	-	-	22	7	-	-	30	43	27	21	38	42	17
	28%	29%	44%	36%	42%	30%	-%	-%	39%	41%	-%	-%	36%	28%	31%	24%	31%	28%	28%
		7%	34%	9%	39%	7%	-%	-%	38%	11%	-%	-%	50%	72%	45%	35%	64%	71%	29%
Vodafone (inc. Cable & Wireless)	44	2	11	4	13	3	-	-	14	3	-	-	17	34	31	16	27	31	13
	20%	16%	24%	26%	24%	21%	-%	-%	25%	18%	-%	-%	20%	23%	36%	19%	22%	20%	21%
		5%	25%	9%	30%	7%	-%	-%	32%	7%	-%	-%	38%	78%	70%	38%	61%	70%	30%
Colt Communications	39	10	13	3	22	1	-	-	17	7	-	-	21	30	22	15	23	32	6
	18%	62%	28%	21%	40%	10%	-%	-%	30%	42%	-%	-%	25%	20%	26%	17%	19%	21%	10%
		25%	32%	8%	57%	4%	-%	-%	45%	18%	-%	-%	54%	79%	57%	39%	61%	84%	16%
AT&T	34	2	19	1	20	1	-	-	20	2	-	-	19	30	18	8	25	29	4
	16%	16%	41%	8%	37%	10%	-%	-%	35%	10%	-%	-%	22%	20%	21%	9%	21%	19%	7%
		7%	55%	4%	59%	4%	-%	-%	60%	5%	-%	-%	56%	89%	54%	25%	74%	87%	13%
Daisy Communications	32	8	13	3	20	3	-	-	18	6	-	-	20	21	19	15	16	26	6
	15%	52%	29%	22%	37%	24%	-%	-%	32%	37%	-%	-%	24%	14%	22%	18%	13%	17%	9%
		25%	41%	10%	63%	11%	-%	-%	57%	20%	-%	-%	64%	67%	59%	49%	51%	81%	19%
KCOM (incl. Kingston Communications & Affiniti)	28	5	11	2	15	3	-	-	16	3	-	-	17	18	16	13	15	21	7
	13%	34%	25%	15%	28%	19%	-%	-%	28%	17%	-%	-%	20%	12%	19%	15%	12%	14%	11%
		18%	40%	8%	53%	10%	-%	-%	56%	10%	-%	-%	58%	64%	58%	47%	53%	75%	25%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 72**

**D7. Which supplier(s) do you use for your use for IP-based services? (MULTI CODE)**

Base : Those who use IP-based alternatives

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
				UP TO 3 YEARS				4+ YEARS		UP TO 2 YEARS					OVER 2 YEARS				
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	h	i	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	o	p	q	r
Significance Level: 95%		*a	b	*c	d	*e	*f	*g	h	*i	*j	*k	l	m	n	o	p	q	r
Unweighted total	218	19	48	18	63	15	-	-	63	20	-	-	88	155	92	82	127	156	62
Effective Weighted Sample	197	18	40	15	53	14	-	-	53	18	-	-	77	143	85	74	116	140	57
Total	216	15	45	14	55	14	-	-	57	17	-	-	84	151	85	88	121	153	63
		7%	21%	7%	25%	7%	-%	-%	26%	8%	-%	-%	39%	70%	39%	41%	56%	71%	29%
Unicom	28	3	10	4	12	4	-	-	13	3	-	-	15	23	21	13	15	23	5
	13%	20%	22%	25%	22%	26%	-%	-%	23%	21%	-%	-%	18%	15%	24%	15%	12%	15%	9%
		11%	35%	13%	42%	14%	-%	-%	46%	12%	-%	-%	53%	81%	74%	47%	53%	81%	19%
Opal Communications	23	3	12	1	14	-	-	-	12	3	-	-	13	19	16	8	15	21	2
	11%	18%	27%	5%	25%	-%	-%	-%	21%	21%	-%	-%	15%	13%	19%	9%	12%	14%	3%
		12%	52%	3%	60%	-%	-%	-%	52%	15%	-%	-%	56%	83%	71%	35%	65%	92%	8%
TalkTalk	20	2	5	2	6	1	-	-	7	2	-	-	12	16	12	4	17	15	6
	9%	10%	11%	15%	12%	10%	-%	-%	12%	10%	-%	-%	14%	11%	14%	4%	14%	10%	9%
		8%	24%	11%	32%	7%	-%	-%	35%	8%	-%	-%	57%	81%	58%	19%	81%	72%	28%
XLN	13	3	3	1	5	-	-	-	4	3	-	-	9	10	8	6	6	10	3
	6%	18%	7%	5%	9%	-%	-%	-%	7%	16%	-%	-%	11%	7%	10%	7%	5%	7%	4%
		20%	23%	6%	35%	-%	-%	-%	29%	20%	-%	-%	69%	76%	63%	47%	44%	79%	21%
Global Crossing	12	2	6	1	7	-	-	-	7	2	-	-	10	12	6	2	10	12	1
	6%	10%	14%	5%	13%	-%	-%	-%	13%	10%	-%	-%	11%	8%	7%	2%	9%	8%	1%
		13%	52%	6%	57%	-%	-%	-%	59%	13%	-%	-%	78%	94%	46%	17%	83%	94%	6%
MCI	10	2	3	2	5	1	-	-	5	2	-	-	9	7	7	3	7	8	2
	4%	10%	7%	15%	8%	10%	-%	-%	9%	10%	-%	-%	11%	5%	9%	3%	6%	5%	3%
		16%	31%	23%	48%	14%	-%	-%	54%	16%	-%	-%	92%	77%	76%	28%	72%	81%	19%
Spitfire	9	3	4	1	7	-	-	-	5	3	-	-	5	7	8	3	6	8	2
	4%	18%	9%	5%	12%	-%	-%	-%	8%	16%	-%	-%	6%	5%	9%	4%	5%	5%	3%
		29%	43%	8%	72%	-%	-%	-%	52%	29%	-%	-%	51%	79%	81%	36%	64%	81%	19%
Other	7	-	-	1	-	1	-	-	1	-	-	-	2	6	-	3	4	3	4
	3%	-%	-%	7%	-%	7%	-%	-%	2%	-%	-%	-%	2%	4%	-%	4%	3%	2%	6%
		-%	-%	14%	-%	14%	-%	-%	14%	-%	-%	-%	25%	89%	-%	45%	55%	46%	54%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 72

D7. Which supplier(s) do you use for your use for IP-based services? (MULTI CODE)

Base : Those who use IP-based alternatives

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%		*a	b	*c	d	*e	*f	*g	h	*i	*j	*k	l	m	n	o	p	q	r
Unweighted total	218	19	48	18	63	15	-	-	63	20	-	-	88	155	92	82	127	156	62
Effective Weighted Sample	197	18	40	15	53	14	-	-	53	18	-	-	77	143	85	74	116	140	57
Total	216	15	45	14	55	14	-	-	57	17	-	-	84	151	85	88	121	153	63
		7%	21%	7%	25%	7%	-%	-%	26%	8%	-%	-%	39%	70%	39%	41%	56%	71%	29%
Don't Know	7	-	-	1	-	-	-	-	-	1	-	-	1	3	-	1	2	3	4
	3%	-%	-%	7%	-%	-%	-%	-%	-%	6%	-%	-%	2%	2%	-%	2%	2%	2%	7%
		-%	-%	15%	-%	-%	-%	-%	-%	15%	-%	-%	21%	39%	-%	21%	33%	37%	63%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 73**

**D8. Approximately how much does your organisation spend annually, across all UK sites on IP-based services? (SINGLE CODE)**

Base : Those who use IP-based alternatives

		COMPANY SIZE				TURNOVER				TELECOMS PROVISION																
		Total	1-49	50-249	250+	UNDER								ISDN30				ISDN30				IP SWITCHED		IP NOT SWITCHED		ANY
			a	b	c	£1M	£1M-£20M	£21M-£100M	OVER £100M	ISDN2	ISDN30	ISDN2 ONLY	ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	ISDN	ISDN	IP					
Significance Level: 95%						d	e	f	g	h	i	j	*k	l	m	n	o	p	q	*r	s					
Unweighted total		218	38	57	122	30	62	57	62	91	85	33	27	58	100	91	85	118	67	16	218					
Effective Weighted Sample		197	36	56	115	27	58	53	58	75	84	20	27	57	97	75	84	102	58	14	197					
Total		216	51	68	97	38	67	51	52	74	74	25	25	49	116	74	74	100	61	13	216					
			24%	32%	45%	18%	31%	24%	24%	34%	34%	12%	12%	23%	54%	34%	34%	46%	28%	6%	100%					
Less than £1,000	(0.7)	5	4	-	1	4	1	-	-	1	1	-	-	1	4	1	1	1	1	-	5					
		2%	8%	-%	1%	10%	2%	-%	-%	1%	1%	-%	-%	2%	4%	1%	1%	1%	1%	-%	2%					
			bc			fg																				
£1,000 to £2,499	(1.8)	15	11	4	-	10	5	-	-	1	2	-	1	1	13	1	2	2	2	-	15					
		7%	22%	5%	-%	25%	7%	-%	-%	1%	3%	-%	4%	2%	11%	1%	3%	2%	4%	-%	7%					
			bc	c		efg	fg							hinop												
£5,000 to £9,999	(7.5)	25	18	7	*	14	9	1	-	5	2	5	2	-	18	5	2	7	5	1	25					
		12%	35%	11%	*%	36%	13%	2%	-%	7%	3%	20%	8%	-%	16%	7%	3%	7%	8%	11%	12%					
			bc	c		efg	fg					ilo			ilop			l	l		ilo					
£10,000 to £19,999	(15.0)	18	3	5	9	3	8	4	2	4	6	2	4	2	10	4	6	8	3	1	18					
		8%	6%	8%	10%	9%	12%	8%	4%	6%	8%	7%	14%	5%	9%	6%	8%	8%	5%	8%	8%					
			18%	30%	52%	18%	47%	24%	11%	23%	33%	10%	20%	13%	57%	23%	33%	43%	18%	6%	100%					
£20,000 to £49,999	(35.0)	24	2	14	8	3	13	4	4	4	2	3	1	1	19	4	2	5	2	1	24					
		11%	5%	21%	8%	9%	19%	8%	7%	5%	3%	12%	4%	2%	16%	5%	3%	5%	3%	6%	11%					
				ac										hilnopq							ilo					
£50,000 to £99,999	(75.0)	29	3	9	17	1	13	8	7	14	11	8	5	6	10	14	11	18	10	3	29					
		13%	5%	14%	17%	2%	19%	16%	13%	18%	14%	30%	18%	12%	9%	18%	14%	18%	17%	22%	13%					
			10%	32%	58%	3%	d	45%	28%	24%	48%	37%	ms	27%	16%	21%	36%	48%	37%	64%	36%	100%				
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																										

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 73

D8. Approximately how much does your organisation spend annually, across all UK sites on IP-based services? (SINGLE CODE)

Base : Those who use IP-based alternatives

		COMPANY SIZE				TURNOVER				TELECOMS PROVISION											
		Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	IP SWITCHED	IP NOT SWITCHED	ANY	
						£1M	£1M-£20M	£21M-£100M	OVER £100M												
Significance Level: 95%			a	b	c	d	e	f	g	h	i	j	*k	l	m	n	o	p	q	*r	s
Unweighted total		218	38	57	122	30	62	57	62	91	85	33	27	58	100	91	85	118	67	16	218
Effective Weighted Sample		197	36	56	115	27	58	53	58	75	84	20	27	57	97	75	84	102	58	14	197
Total		216	51	68	97	38	67	51	52	74	74	25	25	49	116	74	74	100	61	13	216
			24%	32%	45%	18%	31%	24%	24%	34%	34%	12%	12%	23%	54%	34%	34%	46%	28%	6%	100%
£100,000 to £249,999	(175.0)	28	3	9	17	3	9	11	7	13	10	3	1	9	15	13	10	14	8	2	28
		13%	5%	13%	18%	7%	13%	21%	13%	17%	14%	14%	3%	19%	13%	17%	14%	14%	13%	12%	13%
		9%	31%	61%	9%	30%	37%	23%	46%	36%	12%	3%	34%	51%	46%	36%	49%	27%	6%	100%	
£250,000 to £499,999	(375.0)	19	1	8	10	-	4	8	7	9	10	2	3	7	8	9	10	12	7	3	19
		9%	2%	12%	10%	-%	6%	16%	14%	12%	13%	7%	11%	14%	7%	12%	13%	12%	12%	20%	9%
			5%	42%	53%	-%	21%	41%	37%	46%	51%	9%	15%	37%	39%	46%	51%	61%	39%	14%	100%
£500,000 to £999,999	(750.0)	16	-	6	9	-	1	9	5	7	13	1	8	6	1	7	13	15	10	2	16
		7%	-%	9%	10%	-%	2%	18%	10%	9%	18%	5%	30%	12%	1%	9%	18%	15%	16%	15%	7%
			-%	40%	60%	-%	9%	58%	33%	45%	86%	8%	48%	37%	6%	45%	86%	94%	63%	13%	100%
£1,000,000 to £4,999,999	(3000.0)	10	-	1	9	-	-	1	8	5	5	-	-	5	5	5	5	5	3	-	10
		5%	-%	2%	9%	-%	-%	2%	15%	7%	7%	-%	-%	10%	4%	7%	7%	5%	6%	-%	5%
			-%	10%	90%	-%	-%	10%	80%	50%	50%	-%	-%	50%	50%	50%	50%	50%	34%	-%	100%
£5,000,000 to £9,999,999	(7500.0)	7	-	1	6	-	-	2	5	7	7	-	-	7	-	7	7	7	7	-	7
		3%	-%	2%	6%	-%	-%	4%	9%	9%	9%	-%	-%	13%	-%	9%	9%	7%	11%	-%	3%
			-%	16%	84%	-%	-%	28%	72%	100%	100%	-%	-%	100%	-%	100%	100%	100%	100%	100%	-%
£10,000,000 or more	(10000.0)	5	-	-	5	-	-	1	4	4	3	*	-	3	1	4	3	4	3	1	5
		2%	-%	-%	5%	-%	-%	2%	7%	5%	4%	2%	-%	6%	1%	5%	4%	4%	5%	6%	2%
			-%	-%	100%	-%	-%	17%	83%	78%	69%	9%	-%	69%	22%	78%	69%	78%	61%	17%	100%
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																					

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 73

D8. Approximately how much does your organisation spend annually, across all UK sites on IP-based services? (SINGLE CODE)

Base : Those who use IP-based alternatives

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											
	Total	1-49	50-249	250+	UNDER £1M	£1M- £20M	£21M-£10 0M	OVER £100M	ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP SWITCHED	IP NOT SWITCHED	ANY IP
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	*k	l	m	n	o	p	q	*r	s
Unweighted total	218	38	57	122	30	62	57	62	91	85	33	27	58	100	91	85	118	67	16	218
Effective Weighted Sample	197	36	56	115	27	58	53	58	75	84	20	27	57	97	75	84	102	58	14	197
Total	216	51	68	97	38	67	51	52	74	74	25	25	49	116	74	74	100	61	13	216
		24%	32%	45%	18%	31%	24%	24%	34%	34%	12%	12%	23%	54%	34%	34%	46%	28%	6%	100%
Don't know	16	6	4	6	1	4	2	4	2	3	1	2	1	13	2	3	3	-	-	16
	8%	12%	5%	7%	3%	5%	5%	8%	2%	4%	3%	7%	2%	11%	2%	4%	3%	-%	-%	8%
		38%	22%	39%	8%	22%	15%	24%	10%	16%	5%	11%	5%	hlnpq 79%	10%	16%	21%	-%	-%	q 100%
Mean amount in £000s	761.1	29.4	330.7	1431.1	21.5	90.1	761.1	2204.3	1541.5	1562.3	292.5	309.3	2175.4	316.4	1541.5	1562.3	1239.5	1645.6	836.2	761.1
		ab			d	de	def	ms	jms				jmps	ms	jms	m	jms			m
Standard deviation	2021.5	67.47	1012.7	2738.2	44.57	138.92	1883.1	3225.6	2903.9	2821.6	1318.9	327.67	3274.1	1151.9	2903.9	2821.6	2579.5	2958.09	2433.91	2021.5
Standard error	142.23	11.74	137.81	256.45	8.28	18.09	256.26	427.24	309.55	311.59	236.89	65.53	433.67	122.10	309.55	311.59	242.66	361.39	608.48	142.23
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																				

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 73

D8. Approximately how much does your organisation spend annually, across all UK sites on IP-based services? (SINGLE CODE)

Base : Those who use IP-based alternatives

		MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER		
		Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
			a	b	c	d	*e	f	*g	h	i	j	*k	l	*m	n	o	p	q
Significance Level: 95%		218	52	33	133	45	22	39	22	154	64	72	13	71	1	88	130	87	120
Unweighted total		197	41	32	125	40	16	38	22	141	57	61	12	60	1	80	118	79	110
Effective Weighted Sample		216	44	31	141	37	21	35	20	158	58	65	10	64	1	95	121	97	108
			20%	14%	65%	17%	10%	16%	9%	73%	27%	30%	5%	30%	*%	44%	56%	45%	50%
Less than £1,000	(0.7)	5	1	-	4	-	1	-	1	3	2	-	1	-	-	1	3	4	1
		2%	2%	-%	3%	-%	4%	-%	4%	2%	4%	-%	8%	-%	-%	1%	3%	4%	1%
		16%	-%	84%	-%	16%	-%	16%	-%	16%	55%	45%	-%	16%	-%	-%	29%	71%	84%
£1,000 to £2,499	(1.8)	15	1	1	13	1	-	1	1	11	4	2	-	2	-	9	6	15	-
		7%	2%	4%	9%	3%	-%	3%	5%	7%	6%	3%	-%	3%	-%	9%	5%	15%	-%
			7%	8%	85%	7%	-%	8%	7%	74%	26%	15%	-%	15%	-%	61%	39%	100%	-%
£5,000 to £9,999	(7.5)	25	5	1	19	1	4	-	1	20	5	5	1	5	-	19	6	25	-
		12%	11%	3%	14%	4%	17%	-%	5%	13%	9%	8%	10%	8%	-%	20%	5%	26%	-%
			19%	4%	76%	6%	14%	-%	4%	79%	21%	19%	4%	19%	-%	75%	25%	100%	-%
£10,000 to £19,999	(15.0)	18	1	3	14	1	-	3	-	14	4	4	-	4	-	6	11	13	4
		8%	3%	9%	10%	4%	-%	8%	-%	9%	7%	6%	-%	7%	-%	7%	9%	14%	4%
			8%	16%	77%	8%	-%	16%	-%	78%	22%	23%	-%	23%	-%	36%	64%	75%	25%
£20,000 to £49,999	(35.0)	24	1	2	21	-	2	-	2	14	10	2	*	2	-	12	12	17	7
		11%	2%	7%	15%	-%	9%	-%	10%	9%	18%	4%	4%	4%	-%	13%	10%	18%	6%
			3%	8%	88%	-%	8%	-%	8%	57%	43%	10%	2%	10%	-%	50%	50%	71%	29%
£50,000 to £99,999	(75.0)	29	9	4	16	7	4	4	3	17	11	10	3	10	-	13	15	12	16
		13%	21%	12%	11%	18%	22%	10%	13%	11%	20%	15%	32%	15%	-%	14%	13%	13%	15%
			33%	13%	54%	23%	15%	13%	9%	60%	40%	34%	11%	34%	-%	46%	54%	44%	56%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																			



# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 73**

**D8. Approximately how much does your organisation spend annually, across all UK sites on IP-based services? (SINGLE CODE)**

Base : Those who use IP-based alternatives

		MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR		SPEND ON COMMS		
						ISDN2 NOT	ISDN30		IP	IP NOT							UNDER		
		Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	PRIMARY	PRIMARY	NOT PRIMARY	PRIMARY	PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	UNDER £100K	£100K+
			a	b	c	d	*e	f	*g	h	i	j	*k	l	*m	n	o	p	q
Significance Level: 95%																			
Unweighted total		218	52	33	133	45	22	39	22	154	64	72	13	71	1	88	130	87	120
Effective Weighted Sample		197	41	32	125	40	16	38	22	141	57	61	12	60	1	80	118	79	110
Total		216	44	31	141	37	21	35	20	158	58	65	10	64	1	95	121	97	108
			20%	14%	65%	17%	10%	16%	9%	73%	27%	30%	5%	30%	*%	44%	56%	45%	50%
£100,000 to £249,999	(175.0)	28	6	4	18	4	6	4	3	22	7	8	3	8	-	9	19	4	23
		13%	13%	14%	13%	12%	28%	12%	15%	14%	11%	12%	26%	12%	-%	9%	16%	4%	21%
																			p
																			79%
£250,000 to £499,999	(375.0)	19	5	5	9	6	1	5	4	16	4	9	1	9	-	7	12	2	18
		9%	12%	15%	6%	17%	5%	13%	18%	10%	6%	14%	8%	14%	-%	7%	10%	2%	16%
																			p
																			92%
£500,000 to £999,999	(750.0)	16	4	8	4	3	2	9	2	10	5	11	1	10	1	8	8	-	16
		7%	9%	25%	3%	9%	8%	25%	12%	7%	9%	16%	12%	15%	100%	8%	7%	-%	14%
																			p
																			100%
£1,000,000 to £4,999,999	(3000.0)	10	2	1	7	3	-	3	-	9	1	3	-	3	-	1	9	-	10
		5%	5%	3%	5%	9%	-%	10%	-%	6%	1%	5%	-%	5%	-%	1%	8%	-%	9%
																			p
																			100%
£5,000,000 to £9,999,999	(7500.0)	7	5	2	-	6	1	4	2	5	2	7	-	7	-	3	3	-	7
		3%	11%	5%	-%	16%	4%	12%	12%	3%	3%	10%	-%	10%	-%	3%	3%	-%	6%
																			p
																			100%
£10,000,000 or more	(10000.0)	5	3	1	1	3	1	2	1	5	-	4	-	4	-	-	5	-	5
		2%	6%	3%	1%	8%	4%	7%	4%	3%	-%	6%	-%	6%	-%	-%	4%	-%	4%
																			100%
Columns Tested:		a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																	

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 73

D8. Approximately how much does your organisation spend annually, across all UK sites on IP-based services? (SINGLE CODE)

Base : Those who use IP-based alternatives

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
Significance Level: 95%		a	b	c	d	*e	f	*g	h	i	j	*k	l	*m	n	o	p	q
Unweighted total	218	52	33	133	45	22	39	22	154	64	72	13	71	1	88	130	87	120
Effective Weighted Sample	197	41	32	125	40	16	38	22	141	57	61	12	60	1	80	118	79	110
Total	216	44	31	141	37	21	35	20	158	58	65	10	64	1	95	121	97	108
		20%	14%	65%	17%	10%	16%	9%	73%	27%	30%	5%	30%	*%	44%	56%	45%	50%
Don't know	16	*	-	16	*	-	-	-	13	3	*	-	*	-	7	9	4	3
	8%	1%	-%	11%	1%	-%	-%	-%	8%	6%	1%	-%	1%	-%	7%	8%	4%	3%
		3%	-%	ab 97%	3%	-%	-%	-%	79%	21%	3%	-%	3%	-%	43%	57%	26%	19%
Mean amount in £000s	761.1	1807.5	1023.9	330.3	2399.0	818.4	2134.3	1512.1	898.0	400.7	1686.5	190.5	1698.1	750.0	424.7	1028.0	34.6	1413.4
		c	c		hi		hi								n		p	
Standard deviation	2021.5	3207.2	2241.9	1095.1	3467.08	2380.71	3210.91	3021.08	2224.61	1297.29	3024.9	239.36	3042.1	-	1412.7	2369.8	59.22	2626.2
Standard error	142.23	449.10	390.26	100.81	522.68	507.57	514.16	644.10	186.68	167.48	359.00	66.39	363.60	-	156.01	216.33	6.50	242.79
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 73**

**D8. Approximately how much does your organisation spend annually, across all UK sites on IP-based services? (SINGLE CODE)**

Base : Those who use IP-based alternatives

		SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
		NEVER							UP TO 3 YEARS	4+ YEARS			SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK	
		LAST YEAR	EVER	/DK	YES	NO	YES	NO/DK			YES	NO/DK								
		*a	b	*c	d	*e	*f	*g	h	*i	*j	*k	l	m	n	o	p	q	r	
Significance Level: 95%																				
Unweighted total		218	19	48	18	63	15	-	-	63	20	-	-	88	155	92	82	127	156	62
Effective Weighted Sample		197	18	40	15	53	14	-	-	53	18	-	-	77	143	85	74	116	140	57
Total		216	15	45	14	55	14	-	-	57	17	-	-	84	151	85	88	121	153	63
			7%	21%	7%	25%	7%	-%	-%	26%	8%	-%	-%	39%	70%	39%	41%	56%	71%	29%
Less than £1,000	(0.7)	5	-	1	-	1	-	-	-	1	-	-	-	4	1	3	2	3	2	
		2%	-%	2%	-%	1%	-%	-%	-%	1%	-%	-%	-%	2%	1%	3%	2%	2%	3%	
			-%	16%	-%	16%	-%	-%	-%	16%	-%	-%	-%	74%	16%	55%	45%	55%	45%	
£1,000 to £2,499	(1.8)	15	-	2	-	1	1	-	-	2	-	-	-	14	-	6	8	5	9	
		7%	-%	5%	-%	2%	7%	-%	-%	4%	-%	-%	-%	9%	-%	7%	7%	3%	15%	
			-%	15%	-%	8%	7%	-%	-%	15%	-%	-%	-%	93%	-%	42%	58%	36%	64%	
£5,000 to £9,999	(7.5)	25	-	5	1	4	2	-	-	4	2	-	-	7	17	5	18	8	14	12
		12%	-%	10%	10%	6%	17%	-%	-%	6%	15%	-%	-%	8%	12%	6%	20%	6%	9%	19%
			-%	18%	6%	14%	10%	-%	-%	14%	10%	-%	-%	28%	69%	21%	70%	30%	53%	47%
£10,000 to £19,999	(15.0)	18	-	3	1	2	1	-	-	4	-	-	-	5	11	11	13	5	11	7
		8%	-%	7%	7%	3%	7%	-%	-%	7%	-%	-%	-%	6%	7%	13%	15%	4%	7%	11%
			-%	18%	6%	10%	6%	-%	-%	23%	-%	-%	-%	28%	61%	60%	72%	28%	61%	39%
£20,000 to £49,999	(35.0)	24	-	2	1	2	*	-	-	3	-	-	-	5	21	7	11	13	19	5
		11%	-%	4%	6%	4%	3%	-%	-%	5%	-%	-%	-%	6%	14%	9%	12%	11%	13%	8%
			-%	8%	3%	10%	2%	-%	-%	12%	-%	-%	-%	22%	89%	31%	45%	55%	79%	21%
£50,000 to £99,999	(75.0)	29	1	9	3	9	4	-	-	11	2	-	-	10	20	15	10	18	23	6
		13%	5%	21%	20%	16%	26%	-%	-%	19%	14%	-%	-%	12%	13%	18%	12%	15%	15%	10%
			3%	33%	10%	31%	13%	-%	-%	38%	8%	-%	-%	36%	69%	53%	36%	62%	79%	21%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 73

D8. Approximately how much does your organisation spend annually, across all UK sites on IP-based services? (SINGLE CODE)

Base : Those who use IP-based alternatives

		SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
		Total	NEVER			YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
			LAST YEAR	EVER	/DK															
			*a	b	*c	d	*e	*f	*g	h	*i	*j	*k	l	m	n	o	p	q	r
Significance Level: 95%																				
Unweighted total		218	19	48	18	63	15	-	-	63	20	-	-	88	155	92	82	127	156	62
Effective Weighted Sample		197	18	40	15	53	14	-	-	53	18	-	-	77	143	85	74	116	140	57
Total		216	15	45	14	55	14	-	-	57	17	-	-	84	151	85	88	121	153	63
			7%	21%	7%	25%	7%	-%	-%	26%	8%	-%	-%	39%	70%	39%	41%	56%	71%	29%
£100,000 to £249,999	(175.0)	28	3	4	3	8	2	-	-	7	3	-	-	16	16	12	10	18	19	9
		13%	20%	10%	18%	14%	11%	-%	-%	12%	20%	-%	-%	20%	10%	14%	11%	15%	12%	15%
			11%	16%	9%	27%	6%	-%	-%	24%	12%	-%	-%	58%	55%	41%	36%	64%	67%	33%
£250,000 to £499,999	(375.0)	19	3	5	3	7	3	-	-	7	3	-	-	11	11	9	9	10	17	2
		9%	18%	10%	18%	12%	23%	-%	-%	12%	18%	-%	-%	14%	8%	10%	11%	8%	11%	4%
			15%	24%	14%	35%	18%	-%	-%	37%	15%	-%	-%	60%	59%	46%	49%	51%	88%	12%
£500,000 to £999,999	(750.0)	16	1	9	2	9	1	-	-	9	2	-	-	8	14	8	2	13	13	3
		7%	5%	20%	14%	16%	5%	-%	-%	16%	10%	-%	-%	10%	9%	9%	3%	11%	8%	4%
			5%	58%	13%	56%	5%	-%	-%	60%	10%	-%	-%	53%	90%	51%	14%	83%	83%	17%
£1,000,000 to £4,999,999	(3000.0)	10	2	1	-	3	-	-	-	3	-	-	-	7	7	4	1	9	10	-
		5%	16%	2%	-%	6%	-%	-%	-%	6%	-%	-%	-%	8%	5%	5%	1%	7%	7%	-%
			24%	10%	-%	34%	-%	-%	-%	34%	-%	-%	-%	70%	72%	44%	10%	90%	100%	-%
£5,000,000 to £9,999,999	(7500.0)	7	3	3	-	7	-	-	-	4	2	-	-	6	6	5	1	6	7	-
		3%	22%	7%	-%	12%	-%	-%	-%	7%	14%	-%	-%	7%	4%	6%	1%	5%	4%	-%
			52%	48%	-%	100%	-%	-%	-%	64%	36%	-%	-%	88%	88%	76%	12%	88%	100%	-%
£10,000,000 or more	(10000.0)	5	2	1	1	3	-	-	-	2	2	-	-	3	3	5	-	5	3	1
		2%	13%	2%	5%	5%	-%	-%	-%	3%	10%	-%	-%	3%	2%	5%	-%	4%	2%	2%
			44%	17%	17%	61%	-%	-%	-%	44%	35%	-%	-%	61%	74%	100%	-%	100%	74%	26%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 73

D8. Approximately how much does your organisation spend annually, across all UK sites on IP-based services? (SINGLE CODE)

Base : Those who use IP-based alternatives

	SWITCHING ISDN SUPPLIER				CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
	Total	NEVER			YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
		LAST YEAR	EVER	/DK															
Significance Level: 95%		*a	b	*c	d	*e	*f	*g	h	*i	*j	*k	l	m	n	o	p	q	r
Unweighted total	218	19	48	18	63	15	-	-	63	20	-	-	88	155	92	82	127	156	62
Effective Weighted Sample	197	18	40	15	53	14	-	-	53	18	-	-	77	143	85	74	116	140	57
Total	216	15	45	14	55	14	-	-	57	17	-	-	84	151	85	88	121	153	63
		7%	21%	7%	25%	7%	-%	-%	26%	8%	-%	-%	39%	70%	39%	41%	56%	71%	29%
Don't know	16	-	-	*	*	-	-	-	-	-	-	-	4	7	3	4	7	10	6
	8%	-%	-%	3%	1%	-%	-%	-%	-%	-%	-%	-%	4%	5%	4%	4%	5%	7%	10%
		-%	-%	3%	3%	-%	-%	-%	-%	-%	-%	-%	22%	44%	21%	23%	40%	62%	38%
Mean amount in £000s	761.1	3588.2	989.9	787.8	1813.2	171.2	-	-	1283.7	2209.4	-	-	1318.1	822.4	1333.8	206.3	1171.2	942.6	305.4
Standard deviation	2021.5	3893.5	2266.7	2342.8	3080.7	205.34	-	-	2592.7	3685.6	-	-	2583.52	2112.0	2808.49	796.01	2506.2	2186.3	1450.4
Standard error	142.23	893.24	327.17	568.22	391.25	53.02	-	-	326.65	824.13	-	-	280.22	173.61	297.70	89.56	227.84	180.32	195.58
Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																			

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 74

## D9. Approximately how long have you been using your IP-based services? (SINGLE CODE)

Base : Those who use IP-based alternatives

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											IP SWITCHED		IP NOT SWITCHED		ANY IP
	Total	UNDER			OVER				ISDN2	ISDN30 ONLY			ISDN2 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	ISDN	ISDN				
		1-49	50-249	250+	£1M	£1M-£20M	£21M-£100M	£100M		i	j	k									l	m	n	
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m	n	o <td>p<td>q</td><td>r</td><td>s</td></td>	p <td>q</td> <td>r</td> <td>s</td>	q	r	s				
Unweighted total	218	38	57	122	30	62	57	62	91	85	33	27	58	100	91	85	118	67	16	218				
Effective Weighted Sample	197	36	56	115	27	58	53	58	75	84	20	27	57	97	75	84	102	58	14	197				
Total	216	51	68	97	38	67	51	52	74	74	25	25	49	116	74	74	100	61	13	216				
		24%	32%	45%	18%	31%	24%	24%	34%	34%	12%	12%	23%	54%	34%	34%	46%	28%	6%	100%				
Less than 6 months	3	2	-	1	-	2	-	1	1	2	-	1	1	1	1	2	2	2	-	3				
	1%	4%	-%	1%	-%	3%	-%	2%	1%	2%	-%	4%	2%	1%	1%	2%	2%	3%	-%	1%				
		74%	-%	26%	-%	74%	-%	26%	26%	59%	-%	33%	26%	41%	26%	59%	59%	59%	-%	100%				
6 months to 12 months	13	5	3	6	4	4	2	2	4	5	*	2	3	7	4	5	6	5	-	13				
	6%	10%	4%	6%	11%	6%	3%	4%	5%	7%	2%	8%	7%	6%	5%	7%	6%	8%	-%	6%				
		38%	20%	42%	33%	29%	12%	15%	29%	40%	3%	15%	26%	57%	29%	40%	43%	37%	-%	100%				
12 months to 18 months	29	9	12	8	8	13	4	3	9	6	6	4	3	17	9	6	13	10	-	29				
	14%	18%	18%	8%	21%	19%	8%	6%	12%	9%	25%	14%	6%	14%	12%	9%	13%	17%	-%	14%				
					g	g					l													
		32%	42%	26%	27%	44%	15%	10%	31%	22%	21%	12%	10%	57%	31%	22%	43%	35%	-%	100%				
18 months to 24 months	42	11	18	13	10	18	5	7	11	16	3	8	8	24	11	16	19	12	4	42				
	20%	22%	26%	14%	26%	26%	10%	13%	15%	22%	10%	31%	17%	20%	15%	22%	19%	20%	28%	20%				
			c			f																		
		27%	42%	31%	23%	41%	13%	16%	26%	38%	6%	19%	19%	56%	26%	38%	44%	28%	8%	100%				
2 to 5 years	73	16	22	35	11	22	28	12	24	22	9	7	14	42	24	22	31	13	6	73				
	34%	32%	32%	36%	30%	32%	54%	24%	32%	29%	36%	29%	29%	37%	32%	29%	31%	21%	50%	34%				
						deg								q										
		22%	30%	48%	15%	30%	38%	17%	32%	29%	13%	10%	20%	58%	32%	29%	42%	17%	9%	100%				
6 to 10 years	34	4	12	18	3	7	9	16	17	15	4	3	12	15	17	15	19	14	2	34				
	16%	8%	18%	19%	7%	10%	17%	31%	22%	20%	17%	11%	25%	13%	22%	20%	19%	23%	17%	16%				
						de																		
		12%	35%	52%	8%	20%	26%	46%	48%	44%	12%	8%	36%	44%	48%	44%	56%	41%	6%	100%				
11 to 15 years	4	-	-	4	-	1	1	3	2	2	-	-	2	2	2	2	2	1	-	4				
	2%	-%	-%	5%	-%	1%	2%	5%	3%	3%	-%	-%	5%	2%	3%	3%	2%	1%	-%	2%				
		-%	-%	100%	-%	23%	18%	59%	54%	54%	-%	-%	54%	46%	54%	54%	54%	18%	-%	100%				
16 to 20 Years	4	1	-	3	1	-	-	3	2	1	1	-	1	2	2	1	2	2	-	4				
	2%	3%	-%	3%	4%	-%	-%	5%	2%	1%	3%	-%	2%	2%	2%	1%	2%	3%	-%	2%				
		35%	-%	65%	35%	-%	-%	65%	40%	20%	21%	-%	20%	60%	40%	20%	40%	40%	-%	100%				

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 74

D9. Approximately how long have you been using your IP-based services? (SINGLE CODE)

Base : Those who use IP-based alternatives

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION													
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30		IP NOT ISDN	ISDN2 & IP	ISDN30		IP SWITCHED		IP NOT SWITCHED		ANY IP
					£1M	£1M-£20M	£21M-£100M	OVER £100M				ONLY	BOTH ISDN			& IP	& IP	ISDN	ISDN			
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	*k	l	m	n	o	p	q	*r	s		
Unweighted total	218	38	57	122	30	62	57	62	91	85	33	27	58	100	91	85	118	67	16	218		
Effective Weighted Sample	197	36	56	115	27	58	53	58	75	84	20	27	57	97	75	84	102	58	14	197		
Total	216	51	68	97	38	67	51	52	74	74	25	25	49	116	74	74	100	61	13	216		
		24%	32%	45%	18%	31%	24%	24%	34%	34%	12%	12%	23%	54%	34%	34%	46%	28%	6%	100%		
Over 20 Years	5	-	-	5	-	-	2	3	3	3	-	-	3	2	3	3	3	2	1	5		
	2%	-%	-%	5%	-%	-%	3%	6%	4%	4%	-%	-%	6%	2%	4%	4%	3%	4%	6%	2%		
		-%	-%	100%	-%	-%	35%	65%	61%	61%	-%	-%	61%	39%	61%	61%	61%	46%	15%	100%		
Don't know	7	1	1	4	-	1	1	2	2	2	2	1	1	4	2	2	3	-	-	7		
	3%	2%	2%	4%	-%	1%	2%	5%	3%	2%	7%	3%	2%	3%	3%	2%	3%	-%	-%	3%		
		18%	19%	62%	-%	15%	12%	36%	36%	23%	25%	12%	12%	52%	36%	23%	48%	-%	-%	100%		

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 74

## D9. Approximately how long have you been using your IP-based services? (SINGLE CODE)

Base : Those who use IP-based alternatives

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN30			ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		ISDN2	ISDN30	IP														
Significance Level: 95%		a	b	c	d	*e	f	*g	h	i	j	*k	l	*m	n	o	p	q
Unweighted total	218	52	33	133	45	22	39	22	154	64	72	13	71	1	88	130	87	120
Effective Weighted Sample	197	41	32	125	40	16	38	22	141	57	61	12	60	1	80	118	79	110
Total	216	44	31	141	37	21	35	20	158	58	65	10	64	1	95	121	97	108
		20%	14%	65%	17%	10%	16%	9%	73%	27%	30%	5%	30%	*%	44%	56%	45%	50%
Less than 6 months	3	1	1	1	1	-	1	1	3	-	2	-	2	-	-	3	1	2
	1%	2%	3%	1%	2%	-%	2%	5%	2%	-%	3%	-%	3%	-%	-%	3%	1%	2%
		26%	33%	41%	26%	-%	26%	33%	100%	-%	59%	-%	59%	-%	-%	100%	41%	59%
6 months to 12 months	13	1	4	8	1	2	2	3	8	6	4	1	4	-	8	5	10	3
	6%	3%	12%	6%	3%	9%	5%	13%	5%	10%	6%	8%	6%	-%	9%	4%	10%	3%
																	q	
		9%	28%	63%	9%	14%	15%	20%	57%	43%	31%	6%	31%	-%	63%	37%	77%	23%
12 months to 18 months	29	8	2	19	4	5	2	2	24	5	10	-	10	-	19	10	18	11
	14%	19%	7%	13%	10%	22%	6%	11%	16%	8%	16%	-%	16%	-%	20%	8%	19%	10%
															o			
		29%	7%	65%	13%	15%	7%	7%	83%	17%	35%	-%	35%	-%	65%	35%	61%	39%
18 months to 24 months	42	7	9	27	3	5	7	6	31	12	13	3	13	-	27	16	25	17
	20%	16%	28%	19%	9%	26%	21%	28%	19%	20%	19%	28%	20%	-%	28%	13%	26%	16%
															o			
		16%	20%	64%	7%	13%	17%	13%	72%	28%	30%	7%	30%	-%	63%	37%	60%	40%
2 to 5 years	73	10	10	53	9	8	9	5	52	21	15	6	15	-	28	45	29	41
	34%	23%	33%	38%	23%	39%	27%	27%	33%	36%	23%	56%	23%	-%	30%	37%	30%	38%
		14%	14%	72%	12%	11%	13%	7%	71%	29%	20%	8%	20%	-%	39%	61%	40%	56%
6 to 10 years	34	12	5	18	14	-	10	2	25	9	15	1	15	-	10	25	9	22
	16%	26%	15%	13%	38%	-%	28%	12%	16%	16%	24%	8%	24%	-%	10%	20%	10%	20%
					hi												p	
		34%	14%	53%	41%	-%	28%	7%	72%	28%	45%	2%	45%	-%	29%	71%	27%	64%
11 to 15 years	4	1	-	4	1	-	1	-	3	2	1	-	-	1	1	4	2	2
	2%	2%	-%	3%	2%	-%	2%	-%	2%	3%	1%	-%	-%	100%	1%	3%	2%	2%
		18%	-%	82%	18%	-%	18%	-%	59%	41%	18%	-%	-%	18%	18%	82%	46%	54%
16 to 20 Years	4	2	-	2	2	-	1	-	2	2	2	-	2	-	1	3	1	3
	2%	4%	-%	2%	4%	-%	2%	-%	1%	4%	3%	-%	3%	-%	1%	3%	1%	2%
		40%	-%	60%	40%	-%	20%	-%	45%	55%	40%	-%	40%	-%	20%	80%	35%	65%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		



# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 74

D9. Approximately how long have you been using your IP-based services? (SINGLE CODE)

Base : Those who use IP-based alternatives

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30		ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
Significance Level: 95%		a	b	c	d	*e	f	*g	h	i	j	*k	l	*m	n	o	p	q
Unweighted total	218	52	33	133	45	22	39	22	154	64	72	13	71	1	88	130	87	120
Effective Weighted Sample	197	41	32	125	40	16	38	22	141	57	61	12	60	1	80	118	79	110
Total	216	44	31	141	37	21	35	20	158	58	65	10	64	1	95	121	97	108
		20%	14%	65%	17%	10%	16%	9%	73%	27%	30%	5%	30%	*%	44%	56%	45%	50%
Over 20 Years	5	2	1	2	2	1	2	1	5	-	3	-	3	-	-	5	-	5
	2%	5%	3%	1%	6%	4%	7%	4%	3%	-%	5%	-%	5%	-%	-%	4%	-%	5%
		46%	15%	39%	46%	15%	46%	15%	100%	-%	61%	-%	61%	-%	-%	100%	-%	100%
Don't know	7	*	-	6	*	-	-	-	5	2	*	-	*	-	1	6	*	2
	3%	1%	-%	5%	1%	-%	-%	-%	3%	3%	1%	-%	1%	-%	1%	5%	*%	2%
		6%	-%	94%	6%	-%	-%	-%	76%	24%	6%	-%	6%	-%	18%	82%	6%	24%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 74

## D9. Approximately how long have you been using your IP-based services? (SINGLE CODE)

Base : Those who use IP-based alternatives

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%		*a	b	*c	d	*e	*f	*g	h	*i	*j	*k	l	m	n	o	p	q	r
Unweighted total	218	19	48	18	63	15	-	-	63	20	-	-	88	155	92	82	127	156	62
Effective Weighted Sample	197	18	40	15	53	14	-	-	53	18	-	-	77	143	85	74	116	140	57
Total	216	15	45	14	55	14	-	-	57	17	-	-	84	151	85	88	121	153	63
		7%	21%	7%	25%	7%	-%	-%	26%	8%	-%	-%	39%	70%	39%	41%	56%	71%	29%
Less than 6 months	3	1	1	-	2	-	-	-	1	1	-	-	-	1	2	3	-	3	-
	1%	7%	2%	-%	3%	-%	-%	-%	2%	5%	-%	-%	-%	1%	2%	3%	-%	2%	-%
		33%	26%	-%	59%	-%	-%	-%	33%	26%	-%	-%	-%	33%	59%	100%	-%	100%	-%
6 months to 12 months	13	-	5	-	4	-	-	-	5	-	-	-	2	13	4	13	-	10	3
	6%	-%	11%	-%	8%	-%	-%	-%	9%	-%	-%	-%	2%	9%	5%	15%	-%	7%	5%
		-%	37%	-%	34%	-%	-%	-%	37%	-%	-%	-%	14%	100%	30%	100%	-%	76%	24%
12 months to 18 months	29	1	9	-	8	1	-	-	10	-	-	-	14	17	10	29	-	24	6
	14%	7%	21%	-%	15%	7%	-%	-%	18%	-%	-%	-%	16%	11%	12%	33%	-%	16%	9%
		4%	32%	-%	27%	4%	-%	-%	35%	-%	-%	-%	47%	57%	35%	100%	-%	81%	19%
18 months to 24 months	42	3	8	4	10	5	-	-	11	4	-	-	18	31	20	42	-	28	14
	20%	23%	18%	25%	18%	38%	-%	-%	19%	26%	-%	-%	21%	21%	24%	48%	-%	19%	22%
		8%	20%	8%	24%	13%	-%	-%	26%	10%	-%	-%	41%	73%	48%	100%	-%	67%	33%
2 to 5 years	73	1	12	7	14	4	-	-	14	6	-	-	28	52	22	-	73	54	19
	34%	5%	27%	52%	25%	31%	-%	-%	24%	34%	-%	-%	33%	34%	26%	-%	60%	35%	30%
		1%	16%	10%	19%	6%	-%	-%	19%	8%	-%	-%	38%	71%	30%	-%	100%	74%	26%
6 to 10 years	34	6	8	2	12	4	-	-	12	4	-	-	17	25	17	-	34	21	13
	16%	38%	18%	15%	21%	25%	-%	-%	22%	23%	-%	-%	20%	16%	20%	-%	28%	14%	21%
		17%	24%	6%	34%	10%	-%	-%	36%	11%	-%	-%	48%	72%	50%	-%	100%	62%	38%
11 to 15 years	4	1	-	-	1	-	-	-	1	-	-	-	2	4	1	-	4	3	2
	2%	5%	-%	-%	1%	-%	-%	-%	1%	-%	-%	-%	2%	3%	1%	-%	4%	2%	3%
		18%	-%	-%	18%	-%	-%	-%	18%	-%	-%	-%	36%	100%	18%	-%	100%	59%	41%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 74

D9. Approximately how long have you been using your IP-based services? (SINGLE CODE)

Base : Those who use IP-based alternatives

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
	NEVER			YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
	LAST YEAR	EVER	/DK															
Significance Level: 95%	*a	b	*c	d	*e	*f	*g	h	*i	*j	*k	l	m	n	o	p	q	r
Unweighted total	218	19	48	18	63	15	-	63	20	-	-	88	155	92	82	127	156	62
Effective Weighted Sample	197	18	40	15	53	14	-	53	18	-	-	77	143	85	74	116	140	57
Total	216	15	45	14	55	14	-	57	17	-	-	84	151	85	88	121	153	63
	7%	21%	7%	25%	7%	-	-	26%	8%	-	-	39%	70%	39%	41%	56%	71%	29%
16 to 20 Years	4	1	1	-	2	-	-	1	*	-	-	2	4	3	-	4	4	*
	2%	5%	2%	-	3%	-	-	2%	3%	-	-	2%	2%	3%	-	3%	2%	1%
	21%	20%	-	40%	-	-	-	30%	10%	-	-	40%	90%	65%	-	100%	90%	10%
Over 20 Years	5	2	1	1	2	-	-	2	2	-	-	3	3	5	-	5	3	2
	2%	10%	2%	5%	4%	-	-	3%	10%	-	-	4%	2%	6%	-	4%	2%	3%
	31%	15%	15%	46%	-	-	-	31%	31%	-	-	65%	65%	100%	-	100%	65%	35%
Don't know	7	-	-	*	*	-	-	-	-	-	-	*	1	1	-	-	3	4
	3%	-	-	3%	1%	-	-	-	-	-	-	*%	1%	1%	-	-	2%	7%
	-	-	6%	6%	-	-	-	-	-	-	-	6%	18%	18%	-	-	38%	62%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 75

## D10. Do you consider IP to be... (SINGLE CODE)

Base : Those who use IP-based alternatives

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											IP SWITCHED		IP NOT SWITCHED		ANY IP
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN	IP	ISDN					
					£1M	£1M-£20M	£21M-£100M	OVER £100M																
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	*k	l	m	n	o	p	q	*r	s				
Unweighted total	218	38	57	122	30	62	57	62	91	85	33	27	58	100	91	85	118	67	16	218				
Effective Weighted Sample	197	36	56	115	27	58	53	58	75	84	20	27	57	97	75	84	102	58	14	197				
Total	216	51	68	97	38	67	51	52	74	74	25	25	49	116	74	74	100	61	13	216				
		24%	32%	45%	18%	31%	24%	24%	34%	34%	12%	12%	23%	54%	34%	34%	46%	28%	6%	100%				
Your primary service	158	42	46	69	30	43	38	40	49	51	15	17	34	91	49	51	66	38	8	158				
	73%	83%	68%	71%	79%	63%	74%	77%	66%	69%	60%	66%	70%	79%	66%	69%	66%	63%	59%	73%				
		27%	29%	44%	19%	27%	24%	25%	31%	32%	10%	11%	22%	58%	31%	32%	42%	24%	5%	100%				
A supplementary service used in addition to your main one	51	8	18	25	6	22	12	11	20	22	7	9	13	22	20	22	29	19	5	51				
	24%	15%	26%	26%	16%	32%	24%	21%	27%	29%	28%	34%	27%	19%	27%	29%	29%	31%	35%	24%				
		15%	35%	50%	12%	42%	24%	21%	40%	42%	14%	17%	26%	44%	40%	42%	56%	37%	9%	100%				
A back-up system in case your main system fails	7	1	4	2	2	3	1	1	5	2	3	-	2	3	5	2	5	3	1	7				
	3%	2%	5%	3%	5%	5%	2%	2%	7%	2%	12%	-%	4%	2%	7%	2%	5%	5%	6%	3%				
		17%	50%	33%	27%	42%	14%	17%	66%	24%	41%	-%	24%	34%	66%	24%	66%	43%	11%	100%				
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																								

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 75

## D10. Do you consider IP to be... (SINGLE CODE)

Base : Those who use IP-based alternatives

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30		ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
Significance Level: 95%		a	b	c	d	*e	f	*g	h	i	j	*k	l	*m	n	o	p	q
Unweighted total	218	52	33	133	45	22	39	22	154	64	72	13	71	1	88	130	87	120
Effective Weighted Sample	197	41	32	125	40	16	38	22	141	57	61	12	60	1	80	118	79	110
Total	216	44	31	141	37	21	35	20	158	58	65	10	64	1	95	121	97	108
		20%	14%	65%	17%	10%	16%	9%	73%	27%	30%	5%	30%	*%	44%	56%	45%	50%
Your primary service	158	28	19	110	25	12	25	10	158	-	45	2	44	1	64	93	75	72
	73%	64%	61%	78%	68%	60%	72%	54%	100%	-%	69%	25%	69%	100%	67%	77%	78%	66%
					i		i		d fi									
		18%	12%	70%	16%	8%	16%	7%	100%	-%	29%	2%	28%	1%	41%	59%	48%	46%
A supplementary service used in addition to your main one	51	12	12	27	10	6	10	7	-	51	19	5	19	-	27	24	20	31
	24%	26%	39%	19%	27%	29%	28%	37%	-%	87%	29%	49%	29%	-%	28%	20%	20%	29%
			c		h		h		d fh									
		23%	23%	54%	19%	12%	19%	14%	-%	100%	36%	10%	36%	-%	53%	47%	38%	62%
A back-up system in case your main system fails	7	4	-	3	2	2	-	2	-	7	1	3	1	-	4	3	2	5
	3%	9%	-%	2%	5%	11%	-%	9%	-%	13%	2%	26%	2%	-%	4%	3%	2%	5%
					h				fh									
		54%	-%	46%	24%	30%	-%	24%	-%	100%	19%	36%	19%	-%	55%	45%	29%	66%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 75

## D10. Do you consider IP to be... (SINGLE CODE)

Base : Those who use IP-based alternatives

	SWITCHING ISDN SUPPLIER				CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
	Total	NEVER			YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
		LAST YEAR	EVER	/DK															
Significance Level: 95%		*a	b	*c	d	*e	*f	*g	h	*i	*j	*k	l	m	n	o	p	q	r
Unweighted total	218	19	48	18	63	15	-	-	63	20	-	-	88	155	92	82	127	156	62
Effective Weighted Sample	197	18	40	15	53	14	-	-	53	18	-	-	77	143	85	74	116	140	57
Total	216	15	45	14	55	14	-	-	57	17	-	-	84	151	85	88	121	153	63
		7%	21%	7%	25%	7%	-%	-%	26%	8%	-%	-%	39%	70%	39%	41%	56%	71%	29%
Your primary service	158	14	24	9	38	7	-	-	36	11	-	-	66	112	62	66	87	115	43
	73%	95%	53%	63%	70%	50%	-%	-%	63%	65%	-%	-%	79%	74%	73%	75%	72%	75%	68%
		9%	15%	6%	24%	5%	-%	-%	23%	7%	-%	-%	42%	71%	39%	42%	55%	73%	27%
A supplementary service used in addition to your main one	51	1	18	5	14	5	-	-	17	5	-	-	18	34	19	22	27	35	16
	24%	5%	40%	32%	27%	38%	-%	-%	30%	33%	-%	-%	21%	23%	23%	25%	23%	23%	26%
		2%	36%	9%	28%	11%	-%	-%	34%	11%	-%	-%	35%	67%	38%	44%	54%	68%	32%
A back-up system in case your main system fails	7	-	3	1	2	2	-	-	4	*	-	-	*	4	4	-	7	4	4
	3%	-%	7%	6%	3%	13%	-%	-%	6%	3%	-%	-%	*%	3%	4%	-%	6%	2%	6%
		-%	43%	11%	24%	24%	-%	-%	49%	6%	-%	-%	6%	60%	51%	-%	94%	48%	52%
Columns Tested:	a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																		

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 76**

## **E1A. What were your reasons(s) for choosing to implement IP services? (MULTI CODE)**

Base : Those who use IP-based alternatives

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											IP SWITCHED		IP NOT SWITCHED		ANY IP
	Total	UNDER			£1M-£20M	£21M-£100M			ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN	ISDN	ISDN					
		1-49	50-249	250+		£1M	£20M	£21M-£100M												£100M				
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	*k	l	m	n	o	p	q	*r	s				
Unweighted total	218	38	57	122	30	62	57	62	91	85	33	27	58	100	91	85	118	67	16	218				
Effective Weighted Sample	197	36	56	115	27	58	53	58	75	84	20	27	57	97	75	84	102	58	14	197				
Total	216	51	68	97	38	67	51	52	74	74	25	25	49	116	74	74	100	61	13	216				
		24%	32%	45%	18%	31%	24%	24%	34%	34%	12%	12%	23%	54%	34%	34%	46%	28%	6%	100%				
Reliability	134	26	45	63	22	36	39	35	50	50	15	15	35	69	50	50	65	37	9	134				
	62%	50%	67%	65%	58%	54%	77%	67%	67%	67%	60%	59%	71%	59%	67%	67%	65%	61%	69%	62%				
		19%	34%	47%	16%	27%	29%	26%	37%	37%	11%	11%	26%	51%	37%	37%	49%	28%	7%	100%				
Quality of service	117	25	34	59	18	28	36	32	40	44	13	17	27	60	40	44	57	34	6	117				
	54%	48%	49%	61%	47%	42%	70%	61%	54%	59%	52%	67%	55%	52%	54%	59%	57%	56%	49%	54%				
		21%	29%	50%	15%	24%	31%	27%	34%	37%	11%	14%	23%	51%	34%	37%	49%	29%	5%	100%				
Security	108	20	36	52	18	26	30	31	48	43	17	12	31	47	48	43	60	36	6	108				
	50%	39%	52%	54%	47%	38%	59%	61%	65%	59%	67%	47%	64%	41%	65%	59%	61%	60%	46%	50%				
		19%	33%	48%	16%	24%	28%	29%	45%	40%	16%	11%	29%	44%	45%	40%	56%	34%	6%	100%				
Resilience	79	13	25	41	7	22	23	25	29	32	8	10	21	39	29	32	40	23	5	79				
	37%	25%	37%	42%	19%	33%	45%	49%	40%	43%	31%	40%	44%	34%	40%	43%	40%	38%	41%	37%				
		16%	32%	52%	9%	28%	29%	32%	37%	40%	10%	13%	27%	50%	37%	40%	50%	29%	7%	100%				
Price - lower call costs	74	17	19	38	13	25	14	18	30	24	13	6	18	37	30	24	37	19	4	74				
	34%	34%	28%	39%	33%	38%	27%	36%	41%	33%	50%	25%	36%	32%	41%	33%	37%	31%	31%	34%				
		23%	26%	51%	17%	34%	19%	25%	41%	33%	17%	9%	24%	50%	41%	33%	50%	26%	5%	100%				
Flexibility (able to deliver traffic to different locations)	58	9	19	31	6	10	23	16	22	28	6	11	17	25	22	28	33	18	3	58				
	27%	18%	27%	32%	16%	15%	45%	31%	30%	38%	22%	45%	34%	21%	30%	38%	34%	30%	26%	27%				
		16%	32%	52%	11%	17%	39%	27%	38%	48%	10%	19%	28%	43%	38%	48%	57%	31%	6%	100%				
Price - lower rental than ISDN30	57	12	21	24	7	16	15	16	23	28	4	9	19	25	23	28	32	21	4	57				
	26%	24%	30%	25%	19%	24%	29%	31%	31%	37%	18%	35%	38%	21%	31%	37%	32%	35%	34%	26%				
		22%	36%	42%	13%	29%	26%	28%	41%	49%	8%	16%	33%	43%	41%	49%	57%	37%	8%	100%				
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																								

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 76**

## **E1A. What were your reasons(s) for choosing to implement IP services? (MULTI CODE)**

Base : Those who use IP-based alternatives

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											IP SWITCHED		IP NOT SWITCHED		ANY IP
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	ISDN	ISDN					
					£1M	£1M-£20M	£21M-£100M	£100M																
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	*k	l	m	n	o	p	q	*r	s				
Unweighted total	218	38	57	122	30	62	57	62	91	85	33	27	58	100	91	85	118	67	16	218				
Effective Weighted Sample	197	36	56	115	27	58	53	58	75	84	20	27	57	97	75	84	102	58	14	197				
Total	216	51	68	97	38	67	51	52	74	74	25	25	49	116	74	74	100	61	13	216				
		24%	32%	45%	18%	31%	24%	24%	34%	34%	12%	12%	23%	54%	34%	34%	46%	28%	6%	100%				
Additional features	54	10	16	28	8	9	20	14	24	23	8	8	16	23	24	23	31	18	4	54				
	25%	20%	23%	29%	22%	14%	39%	27%	32%	31%	33%	30%	32%	20%	32%	31%	32%	29%	29%	25%				
		19%	29%	52%	15%	17%	e 37%	26%	44%	43%	15%	14%	29%	42%	44%	43%	58%	32%	7%	100%				
To integrate voice and data services	45	4	17	25	4	7	20	14	20	16	8	4	12	22	20	16	24	12	5	45				
	21%	7%	25%	26%	10%	10%	40%	26%	26%	22%	30%	16%	25%	19%	26%	22%	24%	20%	35%	21%				
		a	a	a			de	e																
		8%	37%	55%	8%	15%	45%	30%	43%	35%	17%	9%	26%	48%	43%	35%	52%	26%	10%	100%				
On-demand capacity/scalability	44	7	15	23	4	8	19	13	18	19	5	6	13	20	18	19	24	14	2	44				
	20%	13%	21%	24%	10%	13%	38%	24%	24%	26%	19%	23%	27%	17%	24%	26%	24%	23%	15%	20%				
		15%	33%	52%	9%	19%	de 44%	28%	41%	43%	11%	13%	30%	46%	41%	43%	54%	32%	5%	100%				
Free on-net calls	43	9	11	22	5	11	11	15	19	14	7	2	12	22	19	14	21	11	2	43				
	20%	18%	17%	23%	14%	17%	22%	29%	26%	19%	26%	6%	25%	19%	26%	19%	21%	17%	18%	20%				
		22%	26%	52%	12%	26%	27%	35%	44%	32%	16%	4%	29%	52%	44%	32%	48%	25%	6%	100%				
Price - lower rental than ISDN2	37	11	8	17	5	9	10	9	18	17	3	3	15	16	18	17	21	13	3	37				
	17%	22%	12%	18%	14%	13%	20%	18%	25%	24%	14%	11%	ms 30%	13%	25%	24%	21%	21%	23%	17%				
		31%	22%	47%	14%	25%	28%	25%	50%	48%	10%	8%	40%	43%	50%	48%	57%	34%	8%	100%				
As part of system upgrade	35	6	8	21	4	8	13	10	12	10	5	3	7	20	12	10	15	5	3	35				
	16%	13%	11%	22%	10%	11%	25%	19%	16%	14%	19%	11%	15%	17%	16%	14%	15%	9%	26%	16%				
		18%	22%	60%	11%	22%	36%	28%	35%	29%	14%	8%	21%	57%	35%	29%	43%	15%	10%	100%				
To maximise existing PBX investment	33	5	5	23	6	*	13	14	21	15	7	1	14	11	21	15	22	8	4	33				
	15%	10%	7%	23%	16%	1%	25%	27%	28%	20%	28%	3%	28%	9%	28%	20%	22%	13%	34%	15%				
		b	b	b	e	e	e	e	mqs	m	m		mqs		mqs	m	m							
		16%	15%	69%	18%	1%	39%	42%	64%	45%	22%	2%	42%	34%	64%	45%	66%	24%	13%	100%				
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																								



# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 76

## E1A. What were your reasons(s) for choosing to implement IP services? (MULTI CODE)

Base : Those who use IP-based alternatives

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											ANY IP
	Total	1-49	50-249	250+	UNDER £1M	£1M- £20M	£21M-£10 0M	OVER £100M	ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP SWITCHED ISDN	IP NOT SWITCHED ISDN	
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	*k	l	m	n	o	p	q	*r	s
Unweighted total	218	38	57	122	30	62	57	62	91	85	33	27	58	100	91	85	118	67	16	218
Effective Weighted Sample	197	36	56	115	27	58	53	58	75	84	20	27	57	97	75	84	102	58	14	197
Total	216	51	68	97	38	67	51	52	74	74	25	25	49	116	74	74	100	61	13	216
		24%	32%	45%	18%	31%	24%	24%	34%	34%	12%	12%	23%	54%	34%	34%	46%	28%	6%	100%
Other	3	2	-	1	-	1	1	-	-	2	-	2	-	1	-	2	2	-	1	3
	1%	4%	-%	1%	-%	1%	2%	-%	-%	2%	-%	7%	-%	1%	-%	2%	2%	-%	8%	1%
		74%	-%	26%	-%	33%	26%	-%	-%	59%	-%	59%	-%	41%	-%	59%	59%	-%	33%	100%
Don't Know	4	-	1	3	-	1	1	1	1	1	-	-	1	3	1	1	1	-	-	4
	2%	-%	2%	3%	-%	1%	2%	2%	1%	1%	-%	-%	2%	3%	1%	1%	1%	-%	-%	2%
		-%	32%	68%	-%	24%	24%	19%	19%	19%	-%	-%	19%	81%	19%	19%	19%	-%	-%	100%

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 76

## E1A. What were your reasons(s) for choosing to implement IP services? (MULTI CODE)

Base : Those who use IP-based alternatives

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	b	c	d	*e	f	*g	h	i	j	*k	l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	218	52	33	133	45	22	39	22	154	64	72	13	71	1	88	130	87	120
Effective Weighted Sample	197	41	32	125	40	16	38	22	141	57	61	12	60	1	80	118	79	110
Total	216	44	31	141	37	21	35	20	158	58	65	10	64	1	95	121	97	108
		20%	14%	65%	17%	10%	16%	9%	73%	27%	30%	5%	30%	*%	44%	56%	45%	50%
Reliability	134	27	21	86	26	12	27	10	101	33	44	3	43	1	52	81	59	71
	62%	60%	67%	61%	69%	57%	77%	50%	64%	56%	68%	34%	67%	100%	55%	67%	61%	66%
		20%	16%	65%	19%	9%	20%	7%	76%	24%	33%	3%	32%	1%	39%	61%	44%	53%
Quality of service	117	23	18	76	23	7	23	9	92	25	39	1	39	-	50	67	51	62
	54%	51%	58%	54%	62%	35%	66%	45%	58%	43%	61%	12%	61%	-%	52%	56%	53%	58%
		19%	15%	65%	19%	6%	20%	8%	78%	22%	34%	1%	34%	-%	42%	58%	44%	53%
Security	108	28	15	65	24	12	19	11	75	33	37	5	37	-	50	58	51	55
	50%	63%	48%	46%	65%	56%	54%	55%	47%	57%	58%	52%	58%	-%	52%	48%	53%	51%
		26%	14%	60%	22%	11%	17%	10%	69%	31%	35%	5%	35%	-%	46%	54%	47%	51%
Resilience	79	19	9	51	19	3	18	6	65	14	27	1	26	1	29	50	29	45
	37%	43%	30%	36%	52%	17%	51%	31%	41%	24%	42%	12%	41%	100%	30%	42%	30%	41%
		24%	12%	64%	24%	4%	23%	8%	82%	18%	34%	2%	33%	1%	36%	64%	37%	57%
Price - lower call costs	74	17	6	51	16	5	8	8	55	19	22	2	22	-	34	40	35	37
	34%	39%	21%	36%	42%	23%	22%	39%	35%	32%	33%	18%	34%	-%	36%	33%	36%	34%
		23%	9%	68%	21%	6%	10%	10%	75%	25%	29%	2%	29%	-%	46%	54%	47%	49%
Flexibility (able to deliver traffic to different locations)	58	6	16	37	7	6	16	5	48	11	19	3	19	-	20	38	19	38
	27%	13%	53%	26%	20%	27%	46%	23%	30%	18%	30%	26%	30%	-%	21%	32%	20%	35%
		9%	28%	63%	12%	9%	27%	8%	82%	18%	33%	4%	33%	-%	34%	66%	33%	65%
Price - lower rental than ISDN30	57	12	15	30	13	6	16	7	46	11	24	2	24	-	23	33	27	29
	26%	27%	47%	21%	36%	30%	45%	36%	29%	19%	37%	25%	38%	-%	25%	28%	28%	27%
		21%	26%	53%	23%	11%	27%	12%	80%	20%	42%	4%	42%	-%	41%	59%	47%	51%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 76

## E1A. What were your reasons(s) for choosing to implement IP services? (MULTI CODE)

Base : Those who use IP-based alternatives

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	b	c	d	*e	f	*g	h	i	j	*k	l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	218	52	33	133	45	22	39	22	154	64	72	13	71	1	88	130	87	120
Effective Weighted Sample	197	41	32	125	40	16	38	22	141	57	61	12	60	1	80	118	79	110
Total	216	44	31	141	37	21	35	20	158	58	65	10	64	1	95	121	97	108
		20%	14%	65%	17%	10%	16%	9%	73%	27%	30%	5%	30%	*%	44%	56%	45%	50%
Additional features	54	9	13	32	9	7	13	5	41	13	20	2	20	-	28	26	20	33
	25%	21%	41%	23%	25%	36%	36%	25%	26%	23%	31%	16%	31%	-%	29%	22%	21%	30%
			c															
		17%	23%	60%	17%	14%	23%	9%	75%	25%	37%	3%	37%	-%	52%	48%	37%	61%
To integrate voice and data services	45	6	10	29	8	5	12	1	40	6	16	*	16	-	12	33	14	30
	21%	15%	34%	20%	21%	24%	35%	4%	25%	10%	25%	4%	26%	-%	13%	27%	14%	28%
			a				i		i							n	p	
		14%	23%	63%	17%	11%	26%	2%	88%	12%	36%	1%	36%	-%	27%	73%	30%	66%
On-demand capacity/scalability	44	6	11	27	8	5	12	3	38	7	16	1	16	-	19	25	8	35
	20%	14%	36%	19%	21%	25%	35%	17%	24%	11%	25%	10%	25%	-%	20%	21%	9%	33%
			a				i		i								p	
		14%	25%	62%	17%	12%	28%	8%	85%	15%	36%	2%	36%	-%	44%	56%	19%	80%
Free on-net calls	43	11	2	30	9	4	5	5	28	15	12	1	12	-	14	29	17	26
	20%	24%	8%	21%	25%	18%	14%	25%	18%	26%	19%	8%	19%	-%	15%	24%	17%	24%
		25%	6%	70%	21%	9%	11%	12%	65%	35%	28%	2%	28%	-%	33%	67%	39%	60%
Price - lower rental than ISDN2	37	12	4	21	9	5	7	7	32	4	15	1	15	-	18	19	15	20
	17%	26%	14%	15%	24%	24%	19%	35%	20%	8%	23%	10%	23%	-%	18%	16%	16%	18%
					i				i									
		32%	12%	56%	25%	13%	18%	19%	88%	12%	41%	3%	41%	-%	48%	52%	42%	54%
As part of system upgrade	35	5	4	26	6	2	6	1	30	5	9	-	9	-	5	30	12	22
	16%	11%	12%	19%	16%	8%	17%	4%	19%	8%	13%	-%	14%	-%	5%	25%	13%	20%
															n			
		14%	11%	75%	17%	5%	17%	2%	87%	13%	25%	-%	25%	-%	13%	87%	36%	62%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 76

## E1A. What were your reasons(s) for choosing to implement IP services? (MULTI CODE)

Base : Those who use IP-based alternatives

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	b	c	d	*e	f	*g	h	i	j	*k	l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	218	52	33	133	45	22	39	22	154	64	72	13	71	1	88	130	87	120
Effective Weighted Sample	197	41	32	125	40	16	38	22	141	57	61	12	60	1	80	118	79	110
Total	216	44	31	141	37	21	35	20	158	58	65	10	64	1	95	121	97	108
		20%	14%	65%	17%	10%	16%	9%	73%	27%	30%	5%	30%	*%	44%	56%	45%	50%
To maximise existing PBX investment	33	9	3	20	8	5	4	5	26	6	12	1	12	-	10	22	11	21
	15%	21%	11%	14%	21%	24%	11%	25%	17%	11%	18%	8%	18%	-%	11%	19%	11%	19%
		28%	10%	62%	23%	15%	12%	15%	80%	20%	36%	2%	36%	-%	32%	68%	32%	64%
Other	3	-	1	2	-	-	1	-	2	1	1	-	1	-	1	2	2	1
	1%	-%	3%	1%	-%	-%	3%	-%	1%	2%	2%	-%	2%	-%	1%	1%	2%	1%
		-%	33%	67%	-%	-%	33%	-%	67%	33%	33%	-%	33%	-%	41%	59%	74%	26%
Don't Know	4	-	-	4	-	-	-	-	3	1	-	-	-	-	1	3	-	1
	2%	-%	-%	3%	-%	-%	-%	-%	2%	1%	-%	-%	-%	-%	1%	3%	-%	1%
		-%	-%	100%	-%	-%	-%	-%	81%	19%	-%	-%	-%	-%	24%	76%	-%	19%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 76

## E1A. What were your reasons(s) for choosing to implement IP services? (MULTI CODE)

Base : Those who use IP-based alternatives

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
	LAST YEAR	EVER	NEVER	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%	*a	b	*c	d	*e	*f	*g	h	*i	*j	*k	l	m	n	o	p	q	r
Unweighted total	218	19	48	18	63	15	-	63	20	-	-	88	155	92	82	127	156	62
Effective Weighted Sample	197	18	40	15	53	14	-	53	18	-	-	77	143	85	74	116	140	57
Total	216	15	45	14	55	14	-	57	17	-	-	84	151	85	88	121	153	63
	7%	21%	7%	25%	7%	-%	-%	26%	8%	-%	-%	39%	70%	39%	41%	56%	71%	29%
Reliability	134	10	26	10	36	7	-	37	9	-	-	53	100	59	48	84	99	34
	62%	69%	58%	72%	66%	51%	-%	64%	56%	-%	-%	62%	66%	70%	54%	69%	65%	54%
		8%	20%	8%	27%	6%	-%	28%	7%	-%	-%	39%	75%	44%	36%	63%	74%	26%
Quality of service	117	11	23	7	31	5	-	32	7	-	-	46	92	51	39	75	90	27
	54%	70%	51%	47%	57%	36%	-%	57%	42%	-%	-%	55%	61%	59%	45%	62%	59%	43%
		9%	20%	6%	27%	4%	-%	28%	6%	-%	-%	39%	79%	43%	34%	64%	77%	23%
Security	108	7	29	6	31	8	-	34	8	-	-	44	74	52	48	57	80	28
	50%	48%	64%	44%	57%	55%	-%	59%	50%	-%	-%	52%	49%	61%	55%	47%	52%	44%
		7%	27%	6%	29%	7%	-%	31%	8%	-%	-%	41%	69%	48%	45%	53%	74%	26%
Resilience	79	14	9	5	22	5	-	24	5	-	-	35	59	37	28	48	60	20
	37%	90%	20%	37%	39%	34%	-%	41%	29%	-%	-%	42%	39%	43%	32%	40%	39%	31%
		17%	12%	7%	27%	6%	-%	30%	6%	-%	-%	45%	74%	46%	35%	61%	75%	25%
Price - lower call costs	74	5	14	4	16	6	-	18	5	-	-	29	57	31	34	38	47	27
	34%	34%	31%	31%	29%	39%	-%	31%	31%	-%	-%	35%	38%	37%	39%	32%	31%	43%
		7%	19%	6%	21%	8%	-%	24%	7%	-%	-%	40%	77%	42%	46%	52%	63%	37%
Flexibility (able to deliver traffic to different locations)	58	3	15	4	19	2	-	16	5	-	-	26	46	24	18	38	39	19
	27%	20%	33%	26%	35%	13%	-%	29%	30%	-%	-%	30%	30%	29%	21%	32%	26%	30%
		5%	25%	7%	33%	3%	-%	28%	8%	-%	-%	44%	79%	42%	31%	65%	67%	33%
Price - lower rental than ISDN30	57	7	14	5	20	4	-	22	4	-	-	29	40	30	19	37	42	14
	26%	45%	31%	38%	37%	29%	-%	39%	27%	-%	-%	34%	26%	35%	22%	31%	28%	23%
		12%	25%	10%	36%	7%	-%	39%	8%	-%	-%	51%	70%	52%	34%	66%	75%	25%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 76

## E1A. What were your reasons(s) for choosing to implement IP services? (MULTI CODE)

Base : Those who use IP-based alternatives

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
								UP TO							UP TO				OVER
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	2 YEARS	2 YEARS	YES	NO/DK
Significance Level: 95%		*a	b	*c	d	*e	*f	*g	h	*i	*j	*k	l	m	n	o	p	q	r
Unweighted total	218	19	48	18	63	15	-	-	63	20	-	-	88	155	92	82	127	156	62
Effective Weighted Sample	197	18	40	15	53	14	-	-	53	18	-	-	77	143	85	74	116	140	57
Total	216	15	45	14	55	14	-	-	57	17	-	-	84	151	85	88	121	153	63
		7%	21%	7%	25%	7%	-%	-%	26%	8%	-%	-%	39%	70%	39%	41%	56%	71%	29%
Additional features	54	3	15	4	18	2	-	-	17	4	-	-	20	43	27	17	36	42	12
	25%	18%	33%	29%	33%	15%	-%	-%	30%	26%	-%	-%	24%	29%	31%	19%	30%	28%	19%
		5%	27%	8%	33%	4%	-%	-%	32%	8%	-%	-%	37%	80%	50%	31%	67%	78%	22%
To integrate voice and data services	45	2	10	5	13	2	-	-	13	3	-	-	18	35	17	11	34	37	8
	21%	10%	23%	35%	25%	13%	-%	-%	22%	18%	-%	-%	22%	23%	20%	12%	28%	24%	13%
		3%	23%	11%	30%	4%	-%	-%	28%	7%	-%	-%	41%	76%	38%	24%	74%	82%	18%
On-demand capacity/scalability	44	3	11	3	15	*	-	-	14	3	-	-	22	37	22	13	31	35	9
	20%	18%	25%	21%	27%	3%	-%	-%	25%	16%	-%	-%	27%	24%	26%	15%	25%	23%	15%
		6%	25%	7%	33%	1%	-%	-%	32%	6%	-%	-%	51%	84%	50%	30%	70%	79%	21%
Free on-net calls	43	4	7	2	10	2	-	-	9	4	-	-	18	30	21	19	23	35	8
	20%	23%	15%	16%	19%	13%	-%	-%	16%	22%	-%	-%	21%	20%	24%	22%	19%	23%	13%
		8%	16%	6%	24%	4%	-%	-%	22%	8%	-%	-%	42%	71%	48%	45%	54%	81%	19%
Price - lower rental than ISDN2	37	6	7	3	13	2	-	-	11	5	-	-	18	26	19	18	17	26	10
	17%	36%	16%	23%	23%	17%	-%	-%	19%	27%	-%	-%	22%	17%	22%	21%	14%	17%	17%
		15%	19%	9%	35%	7%	-%	-%	30%	12%	-%	-%	50%	72%	51%	50%	47%	71%	29%
As part of system upgrade	35	2	4	3	6	2	-	-	6	3	-	-	11	24	12	12	23	27	8
	16%	10%	8%	23%	11%	13%	-%	-%	10%	18%	-%	-%	13%	16%	14%	13%	19%	18%	13%
		5%	11%	10%	17%	5%	-%	-%	16%	9%	-%	-%	31%	67%	34%	33%	66%	77%	23%
To maximise existing PBX investment	33	2	6	5	9	3	-	-	9	3	-	-	15	27	22	9	23	25	8
	15%	10%	14%	33%	16%	19%	-%	-%	15%	21%	-%	-%	17%	18%	25%	10%	19%	16%	13%
		5%	19%	15%	27%	9%	-%	-%	27%	10%	-%	-%	44%	82%	66%	26%	70%	75%	25%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 76

## E1A. What were your reasons(s) for choosing to implement IP services? (MULTI CODE)

Base : Those who use IP-based alternatives

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
								UP TO							UP TO	OVER			
	LAST YEAR	EVER	NEVER	YES	NO	YES	NO/DK	3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	2 YEARS	2 YEARS	YES	NO/DK	
Significance Level: 95%	Total	*a	b	*c	d	*e	*f	*g	h	*i	*j	*k	l	m	n	o	p	q	r
Unweighted total	218	19	48	18	63	15	-	-	63	20	-	-	88	155	92	82	127	156	62
Effective Weighted Sample	197	18	40	15	53	14	-	-	53	18	-	-	77	143	85	74	116	140	57
Total	216	15	45	14	55	14	-	-	57	17	-	-	84	151	85	88	121	153	63
		7%	21%	7%	25%	7%	-%	-%	26%	8%	-%	-%	39%	70%	39%	41%	56%	71%	29%
Other	3	-	-	1	-	1	-	-	1	-	-	-	2	2	-	3	-	2	1
	1%	-%	-%	7%	-%	7%	-%	-%	2%	-%	-%	-%	2%	1%	-%	3%	-%	1%	2%
		-%	-%	33%	-%	33%	-%	-%	33%	-%	-%	-%	59%	74%	-%	p 100%	-%	67%	33%
Don't Know	4	-	-	-	-	-	-	-	-	-	-	-	-	1	-	-	1	1	3
	2%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	1%	-%	-%	1%	1%	4%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	24%	-%	-%	24%	32%	68%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 77

## E1B. What was your most important reason for choosing to implement IP services? (SINGLE CODE)

Base : Those who use IP-based alternatives

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30 ONLY	ISDN2 ONLY	ISDN30 BOTH	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN2 & IP	IP SWITCHED	IP NOT SWITCHED	ANY IP	
					£1M	£1M-£20M	£21M-£100M	OVER £100M												
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	*k	l	m	n	o	p	q	*r	s
Unweighted total	218	38	57	122	30	62	57	62	91	85	33	27	58	100	91	85	118	67	16	218
Effective Weighted Sample	197	36	56	115	27	58	53	58	75	84	20	27	57	97	75	84	102	58	14	197
Total	216	51	68	97	38	67	51	52	74	74	25	25	49	116	74	74	100	61	13	216
		24%	32%	45%	18%	31%	24%	24%	34%	34%	12%	12%	23%	54%	34%	34%	46%	28%	6%	100%
Quality of service	55	12	15	28	11	16	13	15	21	21	6	6	15	29	21	21	27	18	3	55
	26%	23%	22%	29%	30%	24%	26%	28%	28%	28%	23%	23%	30%	25%	28%	28%	27%	31%	25%	26%
		21%	27%	51%	20%	29%	24%	27%	37%	38%	10%	11%	27%	52%	37%	38%	48%	33%	6%	100%
Reliability	49	10	18	21	9	16	12	12	16	19	5	8	11	25	16	19	24	16	2	49
	23%	20%	27%	22%	23%	24%	24%	22%	21%	26%	19%	33%	22%	22%	21%	26%	24%	26%	17%	23%
		21%	37%	42%	18%	33%	25%	23%	32%	39%	10%	17%	22%	51%	32%	39%	49%	32%	5%	100%
Security	34	8	11	15	7	9	9	9	19	14	9	4	10	11	19	14	22	15	2	34
	16%	16%	16%	15%	19%	13%	17%	17%	25%	19%	34%	14%	21%	10%	25%	19%	23%	24%	12%	16%
									m		ms				m		m	m		
		24%	32%	44%	21%	26%	26%	26%	56%	41%	25%	11%	30%	34%	56%	41%	66%	44%	5%	100%
Resilience	16	3	10	4	1	7	2	4	5	5	1	1	4	10	5	5	6	4	1	16
	7%	5%	14%	4%	4%	10%	5%	8%	7%	6%	6%	4%	7%	8%	7%	6%	6%	7%	6%	7%
			c																	
		17%	61%	22%	9%	43%	15%	26%	32%	29%	9%	6%	23%	62%	32%	29%	38%	27%	5%	100%
Price - lower rental than ISDN30	11	4	5	3	4	5	2	1	5	5	1	1	4	5	5	5	6	4	-	11
	5%	7%	7%	3%	10%	7%	4%	2%	7%	6%	6%	4%	7%	4%	7%	6%	6%	7%	-%	5%
		33%	43%	23%	33%	43%	17%	7%	45%	42%	13%	9%	33%	45%	45%	42%	55%	38%	-%	100%
Price - lower call costs	11	5	2	3	3	5	1	-	1	2	*	1	1	9	1	2	2	-	1	11
	5%	10%	3%	3%	7%	7%	2%	-%	2%	2%	2%	4%	2%	7%	2%	2%	2%	-%	8%	5%
					g	g								q						
		49%	21%	29%	26%	44%	7%	-%	11%	17%	4%	9%	7%	79%	11%	17%	21%	-%	9%	100%
Flexibility (able to deliver traffic to different locations)	9	3	2	4	1	2	2	2	2	4	*	2	2	5	2	4	4	2	1	9
	4%	6%	3%	4%	4%	4%	5%	3%	3%	5%	2%	7%	4%	4%	3%	5%	4%	3%	6%	4%
		32%	23%	45%	16%	27%	28%	18%	25%	41%	5%	20%	20%	54%	25%	41%	46%	23%	9%	100%

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s



# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 77**

## **E1B. What was your most important reason for choosing to implement IP services? (SINGLE CODE)**

Base : Those who use IP-based alternatives

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											IP SWITCHED		IP NOT SWITCHED	
	Total	UNDER			£1M	£1M-£20M	£21M-£100M		ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	ISDN	ISDN	ANY			
		1-49	50-249	250+			0M	£100M													h	i	j
Significance Level: 95%		a	b	c	d	e	f	g															
Unweighted total	218	38	57	122	30	62	57	62	91	85	33	27	58	100	91	85	118	67	16	218			
Effective Weighted Sample	197	36	56	115	27	58	53	58	75	84	20	27	57	97	75	84	102	58	14	197			
Total	216	51	68	97	38	67	51	52	74	74	25	25	49	116	74	74	100	61	13	216			
		24%	32%	45%	18%	31%	24%	24%	34%	34%	12%	12%	23%	54%	34%	34%	46%	28%	6%	100%			
As part of system upgrade	9	3	1	5	1	3	2	3	1	2	-	1	1	7	1	2	2	-	-	9			
	4%	5%	2%	5%	3%	4%	3%	5%	1%	2%	-%	3%	2%	6%	1%	2%	2%	-%	-%	4%			
		31%	15%	53%	15%	32%	21%	33%	9%	19%	-%	9%	9%	81%	9%	19%	19%	-%	-%	100%			
To integrate voice and data services	7	-	1	6	-	-	3	5	1	1	1	1	-	5	1	1	2	-	1	7			
	3%	-%	2%	6%	-%	-%	5%	9%	2%	1%	5%	3%	-%	5%	2%	1%	2%	-%	9%	3%			
		-%	18%	82%	-%	-%	37%	63%	17%	11%	17%	11%	-%	72%	17%	11%	28%	-%	16%	100%			
Free on-net calls	4	-	1	3	-	1	2	1	2	2	-	-	2	2	2	2	2	1	1	4			
	2%	-%	2%	3%	-%	2%	3%	2%	2%	2%	-%	-%	3%	2%	2%	2%	2%	1%	6%	2%			
		-%	34%	66%	-%	34%	46%	20%	41%	41%	-%	-%	41%	59%	41%	41%	41%	20%	20%	100%			
Price - lower rental than ISDN2	3	1	-	2	-	-	2	-	1	-	1	-	-	2	1	-	1	*	-	3			
	2%	3%	-%	2%	-%	-%	4%	-%	1%	-%	3%	-%	-%	2%	1%	-%	1%	1%	-%	2%			
		44%	-%	56%	-%	-%	56%	-%	26%	-%	26%	-%	-%	74%	26%	-%	26%	13%	-%	100%			
On-demand capacity/scalability	2	1	-	1	-	1	-	1	-	-	-	-	-	2	-	-	-	-	-	2			
	1%	3%	-%	1%	-%	2%	-%	2%	-%	-%	-%	-%	-%	2%	-%	-%	-%	-%	-%	1%			
		59%	-%	41%	-%	59%	-%	41%	-%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	100%			
Additional features	*	-	-	*	-	-	-	*	*	-	*	-	-	-	*	-	*	-	*	*			
	*%	-%	-%	*%	-%	-%	-%	1%	1%	-%	2%	-%	-%	-%	1%	-%	*%	-%	3%	*%			
		-%	-%	100%	-%	-%	-%	100%	100%	-%	100%	-%	-%	-%	100%	-%	100%	-%	100%	100%			
Other	1	1	-	-	-	1	-	-	-	1	-	1	-	-	-	1	1	-	1	1			
	*%	2%	-%	-%	-%	1%	-%	-%	-%	1%	-%	4%	-%	-%	-%	1%	1%	-%	8%	*%			
		100%	-%	-%	-%	100%	-%	-%	-%	100%	-%	100%	-%	-%	-%	100%	100%	-%	100%	100%			

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 77

## E1B. What was your most important reason for choosing to implement IP services? (SINGLE CODE)

Base : Those who use IP-based alternatives

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30		ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
			a	b														
Significance Level: 95%		a	b	c	d	*e	f	*g	h	i	j	*k	l	*m	n	o	p	q
Unweighted total	218	52	33	133	45	22	39	22	154	64	72	13	71	1	88	130	87	120
Effective Weighted Sample	197	41	32	125	40	16	38	22	141	57	61	12	60	1	80	118	79	110
Total	216	44	31	141	37	21	35	20	158	58	65	10	64	1	95	121	97	108
		20%	14%	65%	17%	10%	16%	9%	73%	27%	30%	5%	30%	*%	44%	56%	45%	50%
Quality of service	55	13	8	34	13	4	9	7	47	9	21	1	21	-	27	29	27	28
	26%	30%	27%	24%	35%	19%	26%	37%	30%	15%	32%	8%	33%	-%	28%	24%	28%	26%
					i				i									
		24%	15%	61%	24%	7%	16%	13%	84%	16%	38%	1%	38%	-%	48%	52%	50%	50%
Reliability	49	12	6	31	11	2	10	3	35	14	16	2	15	1	20	29	20	26
	23%	27%	19%	22%	30%	8%	28%	17%	22%	24%	25%	16%	24%	100%	21%	24%	21%	24%
		24%	12%	64%	23%	3%	20%	7%	71%	29%	33%	3%	31%	2%	41%	59%	41%	53%
Security	34	12	4	18	6	9	5	5	18	16	13	4	13	-	20	14	17	17
	16%	27%	14%	12%	15%	42%	14%	26%	12%	27%	20%	36%	20%	-%	21%	12%	17%	16%
		c							h									
		35%	13%	52%	17%	26%	15%	15%	54%	46%	37%	11%	37%	-%	58%	42%	49%	50%
Resilience	16	2	3	11	4	1	3	1	14	2	4	1	4	-	8	8	7	8
	7%	5%	8%	8%	10%	7%	7%	5%	9%	4%	7%	8%	7%	-%	8%	7%	7%	7%
		15%	16%	68%	23%	9%	16%	6%	87%	13%	27%	5%	27%	-%	48%	52%	43%	49%
Price - lower rental than ISDN30	11	1	4	6	1	3	2	2	7	4	4	1	4	-	5	6	6	5
	5%	3%	12%	4%	4%	14%	5%	10%	4%	7%	6%	10%	7%	-%	6%	5%	6%	5%
		13%	35%	52%	13%	26%	17%	18%	64%	36%	38%	9%	38%	-%	50%	50%	51%	49%
Price - lower call costs	11	-	1	10	-	-	1	-	7	4	-	1	-	-	6	5	6	3
	5%	-%	3%	7%	-%	-%	3%	-%	4%	7%	-%	10%	-%	-%	6%	4%	7%	3%
		-%	9%	91%	-%	-%	9%	-%	65%	35%	-%	9%	-%	-%	54%	46%	59%	29%
Flexibility (able to deliver traffic to different locations)	9	-	3	6	-	1	3	-	7	2	2	1	2	-	3	6	3	6
	4%	-%	9%	4%	-%	5%	8%	-%	5%	3%	3%	8%	3%	-%	3%	5%	3%	5%
		a																
		-%	32%	68%	-%	12%	32%	-%	82%	18%	23%	9%	23%	-%	32%	68%	37%	63%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 77

## E1B. What was your most important reason for choosing to implement IP services? (SINGLE CODE)

Base : Those who use IP-based alternatives

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN30			ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		ISDN2	ISDN30	IP														
Significance Level: 95%		a	b	c	d	*e	f	*g	h	i	j	*k	l	*m	n	o	p	q
Unweighted total	218	52	33	133	45	22	39	22	154	64	72	13	71	1	88	130	87	120
Effective Weighted Sample	197	41	32	125	40	16	38	22	141	57	61	12	60	1	80	118	79	110
Total	216	44	31	141	37	21	35	20	158	58	65	10	64	1	95	121	97	108
		20%	14%	65%	17%	10%	16%	9%	73%	27%	30%	5%	30%	*%	44%	56%	45%	50%
As part of system upgrade	9	-	-	9	-	-	-	-	9	-	-	-	-	-	1	7	5	3
	4%	-%	-%	6%	-%	-%	-%	-%	5%	-%	-%	-%	-%	-%	1%	6%	5%	3%
		-%	-%	100%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	15%	85%	58%	33%
To integrate voice and data services	7	*	1	6	*	-	1	-	7	1	1	-	1	-	1	6	1	5
	3%	1%	3%	4%	1%	-%	2%	-%	4%	1%	2%	-%	2%	-%	1%	5%	1%	5%
		6%	11%	84%	6%	-%	11%	-%	89%	11%	16%	-%	16%	-%	19%	81%	14%	73%
Free on-net calls	4	2	-	2	1	1	1	1	-	4	2	-	2	-	-	4	1	3
	2%	4%	-%	2%	2%	4%	2%	4%	-%	7%	2%	-%	2%	-%	-%	3%	1%	2%
		41%	-%	59%	20%	20%	20%	20%	-%	100%	41%	-%	41%	-%	-%	100%	34%	66%
Price - lower rental than ISDN2	3	1	-	2	*	*	-	-	3	-	1	-	1	-	1	2	2	1
	2%	2%	-%	2%	1%	2%	-%	-%	2%	-%	1%	-%	1%	-%	1%	2%	2%	1%
		26%	-%	74%	13%	13%	-%	-%	100%	-%	26%	-%	26%	-%	44%	56%	56%	44%
On-demand capacity/scalability	2	-	-	2	-	-	-	-	1	1	-	-	-	-	1	1	-	2
	1%	-%	-%	2%	-%	-%	-%	-%	1%	2%	-%	-%	-%	-%	1%	1%	-%	2%
		-%	-%	100%	-%	-%	-%	-%	41%	59%	-%	-%	-%	-%	59%	41%	-%	100%
Additional features	*	*	-	-	*	-	-	-	-	*	-	*	-	-	-	*	*	-
	*%	1%	-%	-%	1%	-%	-%	-%	-%	1%	-%	4%	-%	-%	-%	*%	*%	-%
		100%	-%	-%	100%	-%	-%	-%	-%	100%	-%	100%	-%	-%	-%	100%	100%	-%
Other	1	-	1	-	-	-	1	-	-	1	1	-	1	-	-	1	1	-
	*%	-%	3%	-%	-%	-%	3%	-%	-%	2%	2%	-%	2%	-%	-%	1%	1%	-%
		-%	c	-%	-%	-%	h	-%	-%	100%	100%	-%	100%	-%	-%	100%	100%	-%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 77

## E1B. What was your most important reason for choosing to implement IP services? (SINGLE CODE)

Base : Those who use IP-based alternatives

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
	Total	NEVER			YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
		LAST YEAR	EVER	/DK															
Significance Level: 95%		*a	b	*c	d	*e	*f	*g	h	*i	*j	*k	l	m	n	o	p	q	r
Unweighted total	218	19	48	18	63	15	-	-	63	20	-	-	88	155	92	82	127	156	62
Effective Weighted Sample	197	18	40	15	53	14	-	-	53	18	-	-	77	143	85	74	116	140	57
Total	216	15	45	14	55	14	-	-	57	17	-	-	84	151	85	88	121	153	63
		7%	21%	7%	25%	7%	-%	-%	26%	8%	-%	-%	39%	70%	39%	41%	56%	71%	29%
Quality of service	55	8	11	3	17	4	-	-	17	5	-	-	25	45	25	21	35	43	13
	26%	52%	23%	22%	30%	25%	-%	-%	29%	30%	-%	-%	29%	30%	29%	23%	29%	28%	20%
		14%	19%	6%	30%	6%	-%	-%	30%	9%	-%	-%	45%	81%	45%	37%	63%	77%	23%
Reliability	49	4	11	2	14	3	-	-	14	3	-	-	14	36	23	17	31	33	16
	23%	29%	25%	15%	25%	18%	-%	-%	25%	21%	-%	-%	17%	24%	27%	19%	26%	21%	26%
		9%	23%	5%	28%	5%	-%	-%	29%	7%	-%	-%	28%	73%	47%	34%	63%	67%	33%
Security	34	1	14	2	13	2	-	-	13	4	-	-	15	17	20	19	15	28	5
	16%	7%	30%	11%	25%	14%	-%	-%	22%	23%	-%	-%	18%	11%	24%	21%	12%	19%	9%
		3%	40%	5%	40%	6%	-%	-%	37%	11%	-%	-%	44%	50%	60%	55%	44%	84%	16%
Resilience	16	2	2	1	4	1	-	-	5	-	-	-	8	11	5	11	4	11	4
	7%	12%	5%	5%	8%	5%	-%	-%	9%	-%	-%	-%	10%	7%	5%	12%	3%	7%	7%
		11%	15%	5%	27%	5%	-%	-%	32%	-%	-%	-%	53%	70%	29%	66%	26%	72%	28%
Price - lower rental than ISDN30	11	-	4	1	3	1	-	-	4	1	-	-	6	6	3	2	9	5	6
	5%	-%	9%	7%	5%	10%	-%	-%	7%	6%	-%	-%	7%	4%	4%	3%	7%	3%	10%
		-%	38%	9%	26%	13%	-%	-%	38%	9%	-%	-%	50%	58%	27%	20%	80%	45%	55%
Price - lower call costs	11	-	-	1	-	1	-	-	-	1	-	-	2	9	2	4	7	5	6
	5%	-%	-%	7%	-%	7%	-%	-%	-%	6%	-%	-%	2%	6%	2%	4%	6%	3%	9%
		-%	-%	9%	-%	9%	-%	-%	-%	9%	-%	-%	19%	81%	17%	33%	67%	49%	51%
Flexibility (able to deliver traffic to different locations)	9	-	2	1	2	1	-	-	2	1	-	-	4	8	1	4	5	5	4
	4%	-%	5%	5%	4%	5%	-%	-%	4%	5%	-%	-%	5%	5%	1%	5%	4%	3%	6%
		-%	23%	9%	23%	9%	-%	-%	23%	9%	-%	-%	44%	91%	14%	48%	52%	55%	45%
Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																			

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 77

## E1B. What was your most important reason for choosing to implement IP services? (SINGLE CODE)

Base : Those who use IP-based alternatives

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
	NEVER			YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
	LAST YEAR	EVER	/DK															
Significance Level: 95%	*a	b	*c	d	*e	*f	*g	h	*i	*j	*k	l	m	n	o	p	q	r
Unweighted total	218	19	48	18	63	15	-	63	20	-	-	88	155	92	82	127	156	62
Effective Weighted Sample	197	18	40	15	53	14	-	53	18	-	-	77	143	85	74	116	140	57
Total	216	15	45	14	55	14	-	57	17	-	-	84	151	85	88	121	153	63
		7%	21%	7%	25%	7%	-%	26%	8%	-%	-%	39%	70%	39%	41%	56%	71%	29%
As part of system upgrade	9	-	-	-	-	-	-	-	-	-	-	4	5	1	3	5	6	2
	4%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	5%	3%	1%	4%	4%	4%	4%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	45%	58%	12%	39%	61%	72%	28%
To integrate voice and data services	7	-	-	1	-	*	-	*	-	-	-	3	7	1	2	5	7	*
	3%	-%	-%	8%	-%	3%	-%	1%	-%	-%	-%	3%	5%	1%	3%	4%	5%	1%
		-%	-%	16%	-%	6%	-%	6%	-%	-%	-%	39%	94%	14%	31%	63%	94%	6%
Free on-net calls	4	-	1	1	1	1	-	1	1	-	-	2	3	-	1	3	4	-
	2%	-%	2%	5%	1%	5%	-%	1%	5%	-%	-%	2%	2%	-%	1%	2%	3%	-%
		-%	20%	20%	20%	20%	-%	20%	20%	-%	-%	46%	74%	-%	34%	66%	100%	-%
Price - lower rental than ISDN2	3	-	*	*	1	-	-	-	*	-	-	1	1	1	2	1	1	2
	2%	-%	1%	3%	2%	-%	-%	-%	3%	-%	-%	1%	1%	2%	2%	1%	1%	3%
		-%	13%	13%	26%	-%	-%	-%	13%	-%	-%	31%	44%	44%	56%	31%	44%	56%
On-demand capacity/scalability	2	-	-	-	-	-	-	-	-	-	-	-	1	2	1	1	2	-
	1%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	1%	3%	2%	1%	2%	-%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	41%	100%	59%	41%	100%	-%
Additional features	*	-	-	*	-	-	-	-	*	-	-	-	-	-	-	*	*	-
	*%	-%	-%	3%	-%	-%	-%	-%	3%	-%	-%	-%	-%	-%	-%	*%	*%	-%
		-%	-%	100%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	-%	100%	100%	-%
Other	1	-	-	1	-	1	-	1	-	-	-	1	1	-	1	-	-	1
	*%	-%	-%	7%	-%	7%	-%	2%	-%	-%	-%	1%	1%	-%	1%	-%	-%	2%
		-%	-%	100%	-%	100%	-%	100%	-%	-%	-%	100%	100%	-%	100%	-%	-%	100%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 78**

## **E2. Did the implementation of IP require investment in new equipment? (SINGLE CODE)**

Base : Those who use IP-based alternatives

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											ANY IP
	Total	1-49	50-249	250+	UNDER £1M	£1M- £20M	£21M-£10 0M	OVER £100M	ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP SWITCHED ISDN	IP NOT SWITCHED ISDN	
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	*k	l	m	n	o	p	q	*r	s
Unweighted total	218	38	57	122	30	62	57	62	91	85	33	27	58	100	91	85	118	67	16	218
Effective Weighted Sample	197	36	56	115	27	58	53	58	75	84	20	27	57	97	75	84	102	58	14	197
Total	216	51	68	97	38	67	51	52	74	74	25	25	49	116	74	74	100	61	13	216
		24%	32%	45%	18%	31%	24%	24%	34%	34%	12%	12%	23%	54%	34%	34%	46%	28%	6%	100%
Yes	153	32	49	72	22	41	42	41	57	58	16	17	41	79	57	58	74	51	5	153
	71%	63%	71%	74%	58%	61%	83%	79%	77%	78%	65%	67%	83%	68%	77%	78%	74%	84%	36%	71%
		21%	32%	47%	14%	27%	de	de	37%	38%	11%	11%	27%	52%	37%	38%	48%	33%	3%	100%
No	54	18	16	21	15	24	7	8	15	13	9	6	7	33	15	13	22	10	8	54
	25%	35%	24%	21%	39%	36%	14%	16%	20%	17%	34%	25%	13%	28%	20%	17%	22%	16%	64%	25%
		32%	30%	38%	fg	fg	44%	13%	28%	24%	16%	12%	12%	61%	28%	24%	39%	18%	15%	100%
Don't know	9	1	3	4	1	2	1	3	2	4	*	2	2	5	2	4	4	-	-	9
	4%	2%	5%	4%	3%	3%	3%	5%	3%	5%	2%	7%	4%	4%	3%	5%	4%	-%	-%	4%
		15%	39%	46%	15%	24%	17%	30%	26%	42%	5%	21%	21%	53%	26%	42%	47%	-%	-%	100%

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 78

## E2. Did the implementation of IP require investment in new equipment? (SINGLE CODE)

Base : Those who use IP-based alternatives

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	b	c	d	*e	f	*g	h	i	j	*k	l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	218	52	33	133	45	22	39	22	154	64	72	13	71	1	88	130	87	120
Effective Weighted Sample	197	41	32	125	40	16	38	22	141	57	61	12	60	1	80	118	79	110
Total	216	44	31	141	37	21	35	20	158	58	65	10	64	1	95	121	97	108
		20%	14%	65%	17%	10%	16%	9%	73%	27%	30%	5%	30%	*%	44%	56%	45%	50%
Yes	153	33	23	98	27	17	28	15	115	38	51	4	51	-	68	85	61	86
	71%	74%	73%	69%	72%	81%	81%	75%	73%	65%	79%	42%	80%	-%	71%	70%	63%	80%
		21%	15%	64%	17%	11%	18%	10%	75%	25%	33%	3%	33%	-%	45%	55%	40%	56%
No	54	11	7	36	10	3	7	4	35	20	13	5	13	1	25	30	32	20
	25%	25%	24%	26%	27%	14%	19%	20%	22%	34%	21%	48%	20%	100%	26%	25%	33%	19%
		20%	13%	66%	18%	5%	12%	7%	64%	36%	25%	9%	23%	1%	45%	55%	59%	37%
Don't know	9	*	1	7	*	1	-	1	8	1	*	1	*	-	3	6	4	2
	4%	1%	3%	5%	1%	5%	-%	5%	5%	1%	1%	10%	1%	-%	3%	5%	4%	2%
		5%	12%	83%	5%	12%	-%	12%	91%	9%	5%	12%	5%	-%	30%	70%	44%	21%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 78

## E2. Did the implementation of IP require investment in new equipment? (SINGLE CODE)

Base : Those who use IP-based alternatives

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
	NEVER			YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
	LAST YEAR	EVER	/DK															
Significance Level: 95%	*a	b	*c	d	*e	*f	*g	h	*i	*j	*k	l	m	n	o	p	q	r
Unweighted total	218	19	48	18	63	15	-	63	20	-	-	88	155	92	82	127	156	62
Effective Weighted Sample	197	18	40	15	53	14	-	53	18	-	-	77	143	85	74	116	140	57
Total	216	15	45	14	55	14	-	57	17	-	-	84	151	85	88	121	153	63
	7%	21%	7%	25%	7%	-	-	26%	8%	-	-	39%	70%	39%	41%	56%	71%	29%
Yes	153	14	37	5	48	4	-	46	9	-	-	71	109	63	65	85	153	-
	71%	92%	81%	32%	89%	29%	-	80%	52%	-	-	85%	72%	74%	74%	70%	100%	-
		9%	24%	3%	32%	3%	-	30%	6%	-	-	m	47%	71%	41%	43%	r	-
							-			-	-						100%	-
No	54	1	9	8	6	10	-	11	7	-	-	11	39	18	21	33	-	54
	25%	8%	19%	58%	11%	71%	-	20%	41%	-	-	14%	26%	22%	24%	27%	-	86%
		2%	16%	15%	11%	19%	-	21%	13%	-	-	21%	71%	34%	39%	61%	-	q
							-			-	-						100%	
Don't know	9	-	-	1	*	-	-	-	1	-	-	1	3	4	1	3	-	9
	4%	-	-	10%	1%	-	-	-	6%	-	-	2%	2%	4%	1%	3%	-	14%
							-			-	-						q	
		-	-	17%	5%	-	-	-	12%	-	-	15%	39%	41%	15%	36%	-	100%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r



# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 79**

## **E3. What new investment or cost items did the implementation of IP services require? (MULTI CODE)**

Base : Those who use IP-based alternatives where implementation required investment in new equipment

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											IP SWITCHED		IP NOT SWITCHED		
	Total	1-49 *a	50-249 b	250+ c	UNDER				ISDN2 h	ISDN30 i	ISDN2 ONLY *j	ISDN30 ONLY *k	BOTH ISDN l	IP NOT ISDN m	ISDN2 & IP n	ISDN30 & IP o	ISDN & IP p	ISDN q	ISDN *r	ANY IP s				
					£1M *d	£1M- £20M e	£21M-£100M f	OVER £100M g																
Significance Level: 95%																								
Unweighted total	156	24	41	90	18	39	45	49	69	66	21	18	48	69	69	66	87	55	7	156				
Effective Weighted Sample	140	22	40	85	15	36	43	46	57	65	12	18	47	67	57	65	75	47	6	140				
Total	153	32	49	72	22	41	42	41	57	58	16	17	41	79	57	58	74	51	5	153				
		21%	32%	47%	14%	27%	28%	27%	37%	38%	11%	11%	27%	52%	37%	38%	48%	33%	3%	100%				
CAPITAL EXPENDITURE																								
Cost of hardware (e.g. phones)	110	18	34	57	12	30	29	35	38	39	10	11	28	61	38	39	49	30	3	110				
	72%	56%	71%	79%	56%	73%	68%	85%	66%	67%	61%	65%	68%	77%	66%	67%	66%	60%	74%	72%				
		16%	31%	52%	11%	27%	26%	32%	34%	35%	9%	10%	25%	55%	34%	35%	45%	28%	3%	100%				
Cost of infrastructure (e.g. cabling)	109	18	33	59	13	28	32	34	44	47	11	14	33	51	44	47	58	41	3	109				
	71%	55%	68%	82%	58%	69%	75%	82%	77%	82%	67%	82%	81%	65%	77%	82%	78%	82%	61%	71%				
		16%	30%	54%	12%	26%	29%	31%	40%	43%	10%	13%	30%	47%	40%	43%	53%	38%	3%	100%				
Other capital expenditure costs	5	3	-	3	1	1	2	1	1	3	-	2	1	2	1	3	3	2	-	5				
	3%	8%	-%	4%	5%	3%	4%	2%	1%	5%	-%	11%	2%	3%	1%	5%	4%	4%	-%	3%				
		50%	-%	50%	22%	28%	35%	15%	15%	53%	-%	37%	15%	47%	15%	53%	53%	37%	-%	100%				
OPERATIONAL COSTS																								
Installation costs (e.g. down time, costs of removing existing equipment etc))	61	16	18	27	10	15	19	14	22	15	10	3	12	37	22	15	24	15	1	61				
	40%	49%	38%	38%	47%	35%	44%	35%	38%	26%	59%	17%	30%	47% io	38%	26%	33%	31%	27%	40% io				
		26%	30%	45%	17%	24%	31%	23%	35%	24%	16%	5%	20%	60%	35%	24%	40%	25%	2%	100%				
Cost of training	56	6	19	31	5	11	17	21	16	20	4	9	12	31	16	20	25	18	3	56				
	37%	18%	40%	43%	22%	27%	40%	50%	28%	35%	27%	51%	29%	39%	28%	35%	33%	36%	56%	37%				
		11%	35%	55%	9%	20%	30%	37%	29%	36%	8%	16%	21%	56%	29%	36%	44%	33%	5%	100%				
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																								

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 79

## E3. What new investment or cost items did the implementation of IP services require? (MULTI CODE)

Base : Those who use IP-based alternatives where implementation required investment in new equipment

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	*b	c	d	*e	f	*g	h	i	j	*k	l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	156	38	24	94	34	16	31	17	113	43	56	6	56	-	64	92	55	95
Effective Weighted Sample	140	29	24	88	31	12	30	17	103	38	48	5	48	-	57	84	49	88
Total	153	33	23	98	27	17	28	15	115	38	51	4	51	-	68	85	61	86
		21%	15%	64%	17%	11%	18%	10%	75%	25%	33%	3%	33%	-%	45%	55%	40%	56%
<b>CAPITAL EXPENDITURE</b>																		
Cost of hardware (e.g. phones)	110	22	12	76	20	7	20	7	88	22	33	*	33	-	45	64	43	63
	72%	66%	54%	78%	75%	42%	70%	45%	76%	58%	65%	10%	65%	-%	66%	76%	70%	73%
		20%	11%	69%	18%	6%	18%	6%	80%	20%	30%	*%	30%	-%	41%	59%	39%	58%
Cost of infrastructure (e.g. cabling)	109	24	21	65	22	13	25	12	79	31	40	4	40	-	46	63	39	67
	71%	72%	91%	66%	81%	77%	89%	82%	68%	80%	79%	90%	79%	-%	67%	75%	64%	78%
		22%	19%	59%	20%	12%	23%	11%	72%	28%	37%	3%	37%	-%	42%	58%	36%	61%
Other capital expenditure costs	5	1	1	3	1	-	2	-	5	-	2	-	2	-	2	3	3	3
	3%	2%	5%	3%	3%	-%	7%	-%	4%	-%	4%	-%	4%	-%	3%	4%	4%	3%
		15%	22%	63%	15%	-%	37%	-%	100%	-%	37%	-%	37%	-%	41%	59%	50%	50%
<b>OPERATIONAL COSTS</b>																		
Installation costs (e.g. down time, costs of removing existing equipment etc))	61	10	7	45	7	8	6	3	52	9	16	*	16	-	24	37	31	28
	40%	30%	31%	46%	24%	49%	21%	23%	46%	24%	32%	10%	32%	-%	36%	44%	51%	33%
		16%	11%	73%	11%	13%	10%	5%	85%	15%	27%	1%	27%	-%	40%	60%	51%	46%
Cost of training	56	11	10	35	9	5	12	5	47	9	21	*	21	-	26	29	17	37
	37%	33%	46%	36%	34%	31%	41%	36%	41%	24%	40%	10%	40%	-%	39%	35%	27%	42%
		19%	18%	62%	16%	9%	21%	9%	84%	16%	37%	1%	37%	-%	47%	53%	30%	66%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 79

## E3. What new investment or cost items did the implementation of IP services require? (MULTI CODE)

Base : Those who use IP-based alternatives where implementation required investment in new equipment

	SWITCHING ISDN SUPPLIER				CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
	Total	NEVER			YES	NO	YES	NO/DK	UP TO		YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
		LAST YEAR	EVER	/DK					3 YEARS	4+ YEARS									
		*a	b	*c					d	*e									
Significance Level: 95%		*a	b	*c	d	*e	*f	*g	h	*i	*j	*k	l	m	n	o	p	q	*r
Unweighted total	156	17	38	7	53	5	-	-	49	12	-	-	75	115	67	60	92	156	-
Effective Weighted Sample	140	16	32	6	45	4	-	-	41	11	-	-	66	107	62	54	84	140	-
Total	153	14	37	5	48	4	-	-	46	9	-	-	71	109	63	65	85	153	-
		9%	24%	3%	32%	3%	-%	-%	30%	6%	-%	-%	47%	71%	41%	43%	56%	100%	-%
CAPITAL EXPENDITURE																			
Cost of hardware (e.g. phones)	110	10	20	3	28	3	-	-	29	4	-	-	57	82	45	42	66	110	-
	72%	74%	55%	74%	57%	81%	-%	-%	63%	51%	-%	-%	80%	75%	71%	65%	78%	72%	-%
		9%	18%	3%	25%	3%	-%	-%	26%	4%	-%	-%	52%	75%	41%	39%	60%	100%	-%
Cost of infrastructure (e.g. cabling)	109	12	29	3	39	3	-	-	36	7	-	-	48	88	50	44	64	109	-
	71%	87%	80%	61%	81%	67%	-%	-%	79%	86%	-%	-%	67%	81%	80%	67%	75%	71%	-%
		11%	27%	3%	36%	3%	-%	-%	33%	7%	-%	-%	44%	81%	46%	40%	58%	100%	-%
Other capital expenditure costs	5	1	1	-	2	-	-	-	2	-	-	-	1	5	2	3	2	5	-
	3%	6%	3%	-%	4%	-%	-%	-%	4%	-%	-%	-%	1%	5%	3%	4%	3%	3%	-%
		15%	22%	-%	37%	-%	-%	-%	37%	-%	-%	-%	15%	100%	35%	57%	43%	100%	-%
OPERATIONAL COSTS																			
Installation costs (e.g. down time, costs of removing existing equipment etc))	61	2	14	1	16	*	-	-	16	1	-	-	25	43	20	25	35	61	-
	40%	11%	38%	27%	33%	10%	-%	-%	34%	14%	-%	-%	35%	39%	32%	39%	41%	40%	-%
		3%	23%	2%	26%	1%	-%	-%	25%	2%	-%	-%	41%	70%	33%	41%	57%	100%	-%
Cost of training	56	6	12	3	19	1	-	-	17	3	-	-	32	42	27	21	33	56	-
	37%	43%	34%	56%	39%	33%	-%	-%	37%	36%	-%	-%	45%	39%	42%	32%	39%	37%	-%
		11%	22%	5%	34%	3%	-%	-%	31%	6%	-%	-%	57%	76%	48%	37%	59%	100%	-%
Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																			

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 80**

## **E3B. Approximately how much did it cost to implement IP services? (SINGLE CODE)**

Base : Those who use IP-based alternatives where implementation required investment in new equipment

		COMPANY SIZE				TURNOVER				TELECOMS PROVISION												
		Total	1-49 *a	50-249 b	250+ c	UNDER				ISDN2 h	ISDN30 i	ISDN2 ONLY *j	ISDN30 ONLY *k	BOTH ISDN l	IP NOT ISDN m	ISDN2 & IP n	ISDN30 & IP o	ISDN & IP p	IP SWITCHED	IP NOT SWITCHED	ANY IP s	
						£1M *d	£1M- £20M e	£21M-£10 0M f	OVER £100M g										ISDN	ISDN		
Significance Level: 95%																						
Unweighted total		156	24	41	90	18	39	45	49	69	66	21	18	48	69	69	66	87	55	7	156	
Effective Weighted Sample		140	22	40	85	15	36	43	46	57	65	12	18	47	67	57	65	75	47	6	140	
Total		153	32	49	72	22	41	42	41	57	58	16	17	41	79	57	58	74	51	5	153	
			21%	32%	47%	14%	27%	28%	27%	37%	38%	11%	11%	27%	52%	37%	38%	48%	33%	3%	100%	
Less than £1,000	(0.7)	3	3	-	-	1	1	-	-	-	-	-	-	-	3	-	-	-	-	-	3	
		2%	8%	-%	-%	6%	3%	-%	-%	-%	-%	-%	-%	-%	3%	-%	-%	-%	-%	-%	2%	
			100%	-%	-%	53%	47%	-%	-%	-%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	100%	
£1,000 to £2,499	(1.8)	14	12	1	-	8	4	-	-	3	1	3	1	-	9	3	1	4	4	-	14	
		9%	38%	3%	-%	37%	10%	-%	-%	5%	2%	19%	7%	-%	12%	5%	2%	6%	8%	-%	9%	
							fg								ilo							
£5,000 to £9,999	(7.5)	14	4	5	5	5	3	5	1	5	4	2	1	3	8	5	4	5	2	-	14	
		9%	11%	10%	7%	21%	6%	13%	2%	8%	6%	11%	5%	7%	10%	8%	6%	7%	4%	-%	9%	
			27%	37%	36%	34%	19%	40%	7%	34%	26%	13%	6%	21%	60%	34%	26%	40%	15%	-%	100%	
£10,000 to £19,999	(15.0)	12	2	7	3	1	8	2	1	2	3	1	2	1	8	2	3	4	2	*	12	
		8%	7%	15%	4%	6%	19%	5%	2%	3%	5%	5%	12%	3%	11%	3%	5%	5%	5%	9%	8%	
				c			g															
£20,000 to £49,999	(35.0)	24	3	8	14	5	6	8	5	8	5	3	-	5	17	8	5	8	3	*	24	
		16%	8%	15%	20%	21%	15%	20%	12%	13%	9%	16%	-%	12%	21%	13%	9%	10%	5%	9%	16%	
															ioq							
£50,000 to £99,999	(75.0)	17	1	4	12	-	7	5	5	5	5	1	1	4	11	5	5	6	3	1	17	
		11%	4%	8%	16%	-%	16%	12%	12%	8%	8%	5%	5%	10%	14%	8%	8%	8%	6%	17%	11%	
			8%	23%	68%	-%	39%	31%	30%	28%	28%	5%	5%	23%	67%	28%	28%	33%	17%	5%	100%	
£100,000 to £249,999	(175.0)	20	4	10	6	2	11	4	4	9	6	5	2	4	9	9	6	11	9	1	20	
		13%	11%	21%	9%	9%	26%	8%	9%	15%	10%	31%	12%	9%	12%	15%	10%	15%	19%	30%	13%	
							fg															
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s			18%	50%	32%	10%	54%	18%	19%	44%	29%	25%	10%	19%	46%	44%	29%	54%	47%	7%	100%	

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 80

## E3B. Approximately how much did it cost to implement IP services? (SINGLE CODE)

Base : Those who use IP-based alternatives where implementation required investment in new equipment

		COMPANY SIZE				TURNOVER				TELECOMS PROVISION												
						UNDER				ISDN30				ISDN30				IP SWITCHED		IP NOT SWITCHED		
		Total	1-49	50-249	250+	£1M	£1M-£20M	£21M-£100M	OVER £100M	ISDN2	ISDN30	ISDN2 ONLY	ONLY	BOTH	IP NOT	ISDN2 & IP	& IP	ISDN & IP	ISDN	ISDN	ANY	
			*a	b	c	*d	e	f	g	h	i	*j	*k	l	m	n	o	p	q	*r	s	
Significance Level: 95%																						
Unweighted total		156	24	41	90	18	39	45	49	69	66	21	18	48	69	69	66	87	55	7	156	
Effective Weighted Sample		140	22	40	85	15	36	43	46	57	65	12	18	47	67	57	65	75	47	6	140	
Total		153	32	49	72	22	41	42	41	57	58	16	17	41	79	57	58	74	51	5	153	
			21%	32%	47%	14%	27%	28%	27%	37%	38%	11%	11%	27%	52%	37%	38%	48%	33%	3%	100%	
£250,000 to £499,999	(375.0)	15	-	8	7	-	1	10	3	9	13	1	6	7	1	9	13	14	11	1	15	
		10%	-	17%	10%	-	2%	24%	8%	15%	22%	8%	33%	18%	1%	15%	22%	19%	21%	18%	10%	
			-	54%	46%	-	5%	67%	21%	56%	85%	8%	37%	48%	7%	56%	85%	93%	70%	5%	100%	
£500,000 to £999,999	(750.0)	9	-	1	8	-	-	2	7	4	6	-	2	4	3	4	6	6	4	1	9	
		6%	-	2%	11%	-	-	4%	17%	7%	10%	-	11%	10%	4%	7%	10%	8%	8%	17%	6%	
			-	12%	88%	-	-	21%	79%	45%	66%	-	21%	45%	34%	45%	66%	66%	48%	9%	100%	
£1,000,000 to £4,999,999	(3000.0)	9	-	2	7	-	-	3	6	7	8	-	1	7	1	7	8	8	7	-	9	
		6%	-	4%	9%	-	-	7%	14%	12%	13%	-	6%	16%	1%	12%	13%	10%	13%	-	6%	
			-	24%	76%	-	-	33%	67%	76%	88%	-	12%	76%	12%	76%	88%	88%	79%	-	100%	
£5,000,000 to £9,999,999	(7500.0)	3	-	-	3	-	-	-	3	3	3	-	-	3	-	3	3	3	3	-	3	
		2%	-	-	4%	-	-	-	8%	6%	5%	-	-	8%	-	6%	5%	4%	6%	-	2%	
			-	-	100%	-	-	-	100%	100%	100%	-	-	100%	-	100%	100%	100%	100%	-	100%	
£10,000,000 or more	(10000.0)	4	-	-	4	-	-	2	3	2	3	-	1	2	1	2	3	3	2	-	4	
		3%	-	-	6%	-	-	4%	6%	4%	5%	-	5%	6%	1%	4%	5%	4%	5%	-	3%	
			-	-	100%	-	-	38%	62%	57%	76%	-	19%	57%	24%	57%	76%	76%	57%	-	100%	
Don't know		10	4	2	4	-	1	1	4	2	2	1	1	1	7	2	2	3	-	-	10	
		6%	12%	5%	5%	-	3%	2%	9%	3%	3%	5%	6%	2%	9%	3%	3%	4%	-	-	6%	
			39%	24%	37%	-	13%	11%	37%	17%	19%	9%	11%	8%	73%	17%	19%	27%	-	-	100%	
Mean amount in £000s		762.1	31.7	269.8	1399.1	25.6	75.7	747.3	1980.9	1362.6	1588.8	98.9	928.4	1855.8	261.7	1362.6	1588.8	1264.8	1519.0	264.6	762.1	
Columns Tested:		a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																				

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 80**

## **E3B. Approximately how much did it cost to implement IP services? (SINGLE CODE)**

Base : Those who use IP-based alternatives where implementation required investment in new equipment

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION													
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN30		BOTH	IP NOT	ISDN2 & IP	ISDN30 & IP	ISDN & IP	IP SWITCHED	IP NOT SWITCHED	ANY		
					£1M	£1M-£20M	£21M-£100M	OVER £100M			ONLY	ONLY						ISDN	ISDN		ISDN	ISDN
Significance Level: 95%		*a	b	c	*d	e	f	g	h	i	*j	*k	l	m	n	o	p	q	*r	s		
Unweighted total	156	24	41	90	18	39	45	49	69	66	21	18	48	69	69	66	87	55	7	156		
Effective Weighted Sample	140	22	40	85	15	36	43	46	57	65	12	18	47	67	57	65	75	47	6	140		
Total	153	32	49	72	22	41	42	41	57	58	16	17	41	79	57	58	74	51	5	153		
		21%	32%	47%	14%	27%	28%	27%	37%	38%	11%	11%	27%	52%	37%	38%	48%	33%	3%	100%		
Standard deviation	2044.9	57.71	616.71	2785.6	49.01	81.03	2009.4	3070.4	2624.6	2784.8	113.26	2247.4	2958.5	1222.0	2624.6	2784.8	2535.8	2704.88	278.80	2044.9		
Standard error	169.23	12.59	98.75	302.14	11.55	13.14	302.92	462.88	323.07	348.10	25.98	545.08	431.54	153.95	323.07	348.10	278.34	364.73	105.38	169.23		
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																						

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 80

## E3B. Approximately how much did it cost to implement IP services? (SINGLE CODE)

Base : Those who use IP-based alternatives where implementation required investment in new equipment

		MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER		
		Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
			a	*b	c	d	*e	f	*g	h	i	j	*k	l	*m	n	o	p	q
Significance Level: 95%		156	38	24	94	34	16	31	17	113	43	56	6	56	-	64	92	55	95
Unweighted total		140	29	24	88	31	12	30	17	103	38	48	5	48	-	57	84	49	88
Effective Weighted Sample		153	33	23	98	27	17	28	15	115	38	51	4	51	-	68	85	61	86
			21%	15%	64%	17%	11%	18%	10%	75%	25%	33%	3%	33%	-%	45%	55%	40%	56%
Less than £1,000	(0.7)	3	-	-	3	-	-	-	-	1	1	-	-	-	-	-	3	3	-
		2%	-%	-%	3%	-%	-%	-%	-%	1%	4%	-%	-%	-%	-%	-%	3%	4%	-%
			-%	-%	100%	-%	-%	-%	-%	47%	53%	-%	-%	-%	-%	-%	100%	100%	-%
£1,000 to £2,499	(1.8)	14	3	1	9	-	3	1	-	12	1	4	-	4	-	10	4	12	-
		9%	10%	5%	10%	-%	19%	4%	-%	11%	3%	8%	-%	8%	-%	14%	5%	20%	-%
			23%	8%	69%	-%	23%	8%	-%	90%	10%	31%	-%	31%	-%	71%	29%	91%	-%
£5,000 to £9,999	(7.5)	14	1	1	12	1	1	-	2	13	1	2	-	2	-	4	10	7	7
		9%	3%	4%	12%	4%	6%	-%	14%	11%	3%	4%	-%	4%	-%	6%	12%	11%	8%
			8%	7%	85%	8%	7%	-%	15%	93%	7%	15%	-%	15%	-%	28%	72%	49%	51%
£10,000 to £19,999	(15.0)	12	2	1	9	*	1	1	1	7	5	2	1	2	-	9	3	8	5
		8%	6%	4%	10%	2%	9%	4%	7%	6%	14%	4%	24%	4%	-%	14%	4%	12%	6%
			15%	8%	77%	3%	12%	8%	8%	56%	44%	15%	8%	15%	-%	76%	24%	62%	38%
£20,000 to £49,999	(35.0)	24	3	-	21	3	-	-	1	15	10	3	*	3	-	13	11	14	10
		16%	9%	-%	22%	11%	-%	-%	5%	13%	26%	5%	10%	5%	-%	20%	13%	22%	11%
			12%	-%	88%	12%	-%	-%	3%	60%	40%	11%	2%	11%	-%	55%	45%	56%	41%
£50,000 to £99,999	(75.0)	17	3	1	13	3	*	2	2	13	4	4	-	4	-	5	12	8	9
		11%	9%	4%	14%	12%	3%	6%	11%	12%	10%	7%	-%	7%	-%	7%	14%	14%	10%
			17%	5%	79%	19%	2%	9%	9%	79%	21%	21%	-%	21%	-%	27%	73%	49%	51%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 80

## E3B. Approximately how much did it cost to implement IP services? (SINGLE CODE)

Base : Those who use IP-based alternatives where implementation required investment in new equipment

		MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER		
		Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
			a	*b	c	d	*e	f	*g	h	i	j	*k	l	*m	n	o	p	q
Significance Level: 95%																			
Unweighted total		156	38	24	94	34	16	31	17	113	43	56	6	56	-	64	92	55	95
Effective Weighted Sample		140	29	24	88	31	12	30	17	103	38	48	5	48	-	57	84	49	88
Total		153	33	23	98	27	17	28	15	115	38	51	4	51	-	68	85	61	86
			21%	15%	64%	17%	11%	18%	10%	75%	25%	33%	3%	33%	-%	45%	55%	40%	56%
£100,000 to £249,999	(175.0)	20	7	4	9	3	5	2	4	14	6	10	1	10	-	10	10	5	15
		13%	21%	17%	9%	12%	33%	7%	25%	12%	17%	20%	19%	20%	-%	14%	12%	9%	17%
			35%	19%	46%	16%	28%	10%	19%	68%	32%	50%	4%	50%	-%	48%	52%	26%	74%
£250,000 to £499,999	(375.0)	15	3	8	4	4	2	10	1	12	3	11	*	11	-	6	9	1	14
		10%	11%	36%	4%	17%	12%	35%	5%	10%	9%	22%	10%	22%	-%	9%	10%	1%	17%
								hi										p	
£500,000 to £999,999	(750.0)		23%	53%	25%	29%	14%	65%	5%	79%	21%	72%	3%	72%	-%	42%	58%	5%	95%
		9	2	3	4	2	1	4	1	6	3	4	1	4	-	2	7	-	9
		6%	5%	15%	4%	9%	5%	15%	5%	5%	8%	8%	19%	8%	-%	3%	8%	-%	10%
£1,000,000 to £4,999,999	(3000.0)		18%	39%	43%	27%	9%	48%	9%	64%	36%	48%	9%	48%	-%	20%	80%	-%	100%
		9	6	1	2	5	1	5	2	8	1	6	1	6	-	3	6	-	9
		6%	18%	5%	2%	19%	5%	19%	11%	7%	2%	12%	19%	12%	-%	4%	7%	-%	10%
£5,000,000 to £9,999,999	(7500.0)		c			i		i										p	
			67%	12%	21%	58%	9%	61%	18%	91%	9%	70%	9%	70%	-%	30%	70%	-%	100%
		3	2	2	-	2	1	2	2	2	1	3	-	3	-	3	-	-	3
£10,000,000 or more	(10000.0)		2%	5%	7%	9%	5%	6%	11%	2%	2%	6%	-%	6%	-%	5%	-%	-%	4%
																o			
			50%	50%	-%	75%	25%	50%	50%	75%	25%	100%	-%	100%	-%	100%	-%	-%	100%
		4	2	1	2	2	1	2	1	4	-	2	-	2	-	-	4	-	4
		3%	5%	4%	2%	6%	5%	6%	5%	4%	-%	5%	-%	5%	-%	-%	5%	-%	5%
			38%	19%	43%	38%	19%	38%	19%	100%	-%	57%	-%	57%	-%	-%	100%	-%	100%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																			



# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 80**

## **E3B. Approximately how much did it cost to implement IP services? (SINGLE CODE)**

Base : Those who use IP-based alternatives where implementation required investment in new equipment

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	*b	c	d	*e	f	*g	h	i	j	*k	l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	156	38	24	94	34	16	31	17	113	43	56	6	56	-	64	92	55	95
Effective Weighted Sample	140	29	24	88	31	12	30	17	103	38	48	5	48	-	57	84	49	88
Total	153	33	23	98	27	17	28	15	115	38	51	4	51	-	68	85	61	86
		21%	15%	64%	17%	11%	18%	10%	75%	25%	33%	3%	33%	-%	45%	55%	40%	56%
Don't know	10	-	-	10	-	-	-	-	8	1	-	-	-	-	4	6	4	2
	6%	-%	-%	10%	-%	-%	-%	-%	7%	3%	-%	-%	-%	-%	6%	7%	6%	3%
		-%	-%	100%	-%	-%	-%	-%	88%	12%	-%	-%	-%	-%	39%	61%	39%	23%
Mean amount in £000s	762.1	1496.9	1292.1	352.8	1982.1	1113.0	1797.9	1787.8	897.4	371.4	1466.3	775.7	1466.3	-	589.7	902.5	43.6	1270.5
		c			hi		i											p
Standard deviation	2044.9	2674.5	2571.9	1464.7	3013.88	2656.12	2757.83	3155.02	2260.17	1167.63	2693.7	1253.7	2693.7	-	1690.9	2294.5	63.62	2556.8
Standard error	169.23	433.87	524.99	159.81	516.88	664.03	495.32	765.21	220.57	182.35	359.96	511.83	359.96	-	216.50	248.87	8.82	266.57
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 80

## E3B. Approximately how much did it cost to implement IP services? (SINGLE CODE)

Base : Those who use IP-based alternatives where implementation required investment in new equipment

		SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
		NEVER							UP TO 3 YEARS	4+ YEARS			SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK	
		LAST YEAR	EVER	/DK	YES	NO	YES	NO/DK			YES	NO/DK								
		*a	b	*c	d	*e	*f	*g	h	*i	*j	*k	l	m	n	o	p	q	*r	
Significance Level: 95%																				
Unweighted total		156	17	38	7	53	5	-	-	49	12	-	-	75	115	67	60	92	156	-
Effective Weighted Sample		140	16	32	6	45	4	-	-	41	11	-	-	66	107	62	54	84	140	-
Total		153	14	37	5	48	4	-	-	46	9	-	-	71	109	63	65	85	153	-
			9%	24%	3%	32%	3%	-%	-%	30%	6%	-%	-%	47%	71%	41%	43%	56%	100%	-%
Less than £1,000	(0.7)	3	-	-	-	-	-	-	-	-	-	-	-	1	-	1	1	3	-	-
		2%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	1%	-%	2%	2%	2%	-%	-%
			-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	53%	-%	47%	53%	100%	-%	-%
£1,000 to £2,499	(1.8)	14	-	4	-	4	-	-	-	4	-	-	-	9	-	11	3	14	-	-
		9%	-%	12%	-%	9%	-%	-%	-%	9%	-%	-%	-%	8%	-%	17%	3%	9%	-%	-%
			-%	31%	-%	31%	-%	-%	-%	31%	-%	-%	-%	n	-%	p	20%	100%	-%	-%
£5,000 to £9,999	(7.5)	14	1	1	-	2	-	-	-	2	-	-	-	9	7	7	7	14	-	-
		9%	7%	3%	-%	4%	-%	-%	-%	4%	-%	-%	-%	9%	11%	11%	8%	9%	-%	-%
			8%	7%	-%	15%	-%	-%	-%	15%	-%	-%	-%	68%	52%	52%	48%	100%	-%	-%
£10,000 to £19,999	(15.0)	12	-	2	*	2	-	-	-	3	-	-	-	8	4	7	5	12	-	-
		8%	-%	7%	9%	5%	-%	-%	-%	6%	-%	-%	-%	7%	6%	11%	6%	8%	-%	-%
			-%	20%	3%	20%	-%	-%	-%	23%	-%	-%	-%	63%	32%	59%	41%	100%	-%	-%
£20,000 to £49,999	(35.0)	24	1	2	*	3	-	-	-	2	1	-	-	19	11	13	11	24	-	-
		16%	6%	5%	9%	5%	-%	-%	-%	5%	10%	-%	-%	17%	17%	20%	14%	16%	-%	-%
			3%	7%	2%	11%	-%	-%	-%	9%	3%	-%	-%	77%	45%	53%	47%	100%	-%	-%
£50,000 to £99,999	(75.0)	17	2	1	1	2	2	-	-	3	1	-	-	11	7	5	11	17	-	-
		11%	11%	3%	17%	4%	38%	-%	-%	6%	9%	-%	-%	10%	11%	8%	13%	11%	-%	-%
			9%	7%	5%	12%	9%	-%	-%	17%	5%	-%	-%	67%	43%	33%	67%	100%	-%	-%
Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																				

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 80

## E3B. Approximately how much did it cost to implement IP services? (SINGLE CODE)

Base : Those who use IP-based alternatives where implementation required investment in new equipment

		SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
		NEVER							UP TO 3 YEARS	4+ YEARS			SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK	
		LAST YEAR	EVER	/DK	YES	NO	YES	NO/DK			YES	NO/DK								
		*a	b	*c	d	*e	*f	*g	h	*i	*j	*k	l	m	n	o	p	q	*r	
Significance Level: 95%		Total																		
Unweighted total		156	17	38	7	53	5	-	-	49	12	-	-	75	115	67	60	92	156	-
Effective Weighted Sample		140	16	32	6	45	4	-	-	41	11	-	-	66	107	62	54	84	140	-
Total		153	14	37	5	48	4	-	-	46	9	-	-	71	109	63	65	85	153	-
			9%	24%	3%	32%	3%	-%	-%	30%	6%	-%	-%	47%	71%	41%	43%	56%	100%	-%
£100,000 to £249,999	(175.0)	20	3	7	1	9	1	-	-	9	2	-	-	12	9	12	9	11	20	-
		13%	18%	19%	30%	19%	33%	-%	-%	20%	18%	-%	-%	16%	8%	19%	14%	13%	13%	-%
			13%	34%	7%	47%	7%	-%	-%	46%	8%	-%	-%	58%	43%	59%	45%	55%	100%	-%
£250,000 to £499,999	(375.0)	15	2	9	1	9	1	-	-	11	1	-	-	11	15	6	3	12	15	-
		10%	11%	25%	18%	19%	29%	-%	-%	23%	9%	-%	-%	15%	14%	9%	4%	14%	10%	-%
			10%	59%	5%	60%	8%	-%	-%	70%	5%	-%	-%	70%	97%	39%	18%	79%	100%	-%
£500,000 to £999,999	(750.0)	9	1	3	1	4	-	-	-	2	2	-	-	5	7	4	5	4	9	-
		6%	6%	9%	17%	9%	-%	-%	-%	4%	27%	-%	-%	8%	6%	6%	7%	5%	6%	-%
			9%	39%	9%	48%	-%	-%	-%	21%	27%	-%	-%	62%	80%	41%	53%	47%	100%	-%
£1,000,000 to £4,999,999	(3000.0)	9	3	3	-	7	-	-	-	5	2	-	-	6	6	6	2	7	9	-
		6%	24%	9%	-%	14%	-%	-%	-%	11%	18%	-%	-%	8%	6%	10%	2%	8%	6%	-%
			40%	40%	-%	79%	-%	-%	-%	61%	18%	-%	-%	67%	72%	72%	18%	82%	100%	-%
£5,000,000 to £9,999,999	(7500.0)	3	1	2	-	3	-	-	-	3	-	-	-	3	3	3	-	3	3	-
		2%	6%	6%	-%	7%	-%	-%	-%	7%	-%	-%	-%	4%	3%	5%	-%	4%	2%	-%
			25%	75%	-%	100%	-%	-%	-%	100%	-%	-%	-%	100%	100%	100%	-%	100%	100%	-%
£10,000,000 or more	(10000.0)	4	2	1	-	2	-	-	-	2	1	-	-	2	4	3	-	4	4	-
		3%	11%	2%	-%	5%	-%	-%	-%	3%	9%	-%	-%	3%	4%	5%	-%	5%	3%	-%
			38%	19%	-%	57%	-%	-%	-%	38%	19%	-%	-%	57%	100%	81%	-%	100%	100%	-%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 80

## E3B. Approximately how much did it cost to implement IP services? (SINGLE CODE)

Base : Those who use IP-based alternatives where implementation required investment in new equipment

	Total	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
		NEVER			YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
		LAST YEAR	EVER	/DK															
Significance Level: 95%		*a	b	*c	d	*e	*f	*g	h	*i	*j	*k	l	m	n	o	p	q	*r
Unweighted total	156	17	38	7	53	5	-	-	49	12	-	-	75	115	67	60	92	156	-
Effective Weighted Sample	140	16	32	6	45	4	-	-	41	11	-	-	66	107	62	54	84	140	-
Total	153	14	37	5	48	4	-	-	46	9	-	-	71	109	63	65	85	153	-
		9%	24%	3%	32%	3%	-%	-%	30%	6%	-%	-%	47%	71%	41%	43%	56%	100%	-%
Don't know	10	-	-	-	-	-	-	-	-	-	-	-	3	7	-	3	5	10	-
	6%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	4%	7%	-%	4%	6%	6%	-%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	31%	n 76%	-%	26%	52%	100%	-%
Mean amount in £000s	762.1	2394.3	1182.0	264.6	1575.6	195.0	-	-	1364.2	1732.6	-	-	1107.3	963.1	1325.9	188.4	1216.5	762.1	-
Standard deviation	2044.9	3421.2	2342.8	278.80	2752.8	139.92	-	-	2588.6	2985.3	-	-	2395.86	2361.3	2722.52	496.60	2622.3	2044.9	-
Standard error	169.23	829.76	380.05	105.38	378.12	62.57	-	-	369.80	861.77	-	-	282.36	228.28	332.61	65.21	281.15	169.23	-

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 81**

## **E4. Has implementing IP saved you money on your regular bills? (SINGLE CODE)**

Base : Those who use IP-based alternatives

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											IP SWITCHED		IP NOT SWITCHED		ANY IP
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN30		BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	ISDN	ISDN					
					£1M-£20M	£21M-£100M	ONLY	ONLY																
		a	b	c	d	e	f	g	h	i	j	*k	l	m	n	o	p	q	*r	s				
Significance Level: 95%																								
Unweighted total	218	38	57	122	30	62	57	62	91	85	33	27	58	100	91	85	118	67	16	218				
Effective Weighted Sample	197	36	56	115	27	58	53	58	75	84	20	27	57	97	75	84	102	58	14	197				
Total	216	51	68	97	38	67	51	52	74	74	25	25	49	116	74	74	100	61	13	216				
		24%	32%	45%	18%	31%	24%	24%	34%	34%	12%	12%	23%	54%	34%	34%	46%	28%	6%	100%				
Yes	156	32	53	71	25	50	40	39	55	57	16	19	39	83	55	57	73	46	9	156				
	72%	64%	78%	73%	66%	75%	79%	76%	74%	77%	63%	74%	79%	71%	74%	77%	74%	76%	70%	72%				
		21%	34%	45%	16%	32%	26%	25%	35%	37%	10%	12%	25%	53%	35%	37%	47%	29%	6%	100%				
No	23	6	7	10	4	8	7	4	11	5	8	3	3	10	11	5	13	10	2	23				
	11%	11%	11%	11%	11%	13%	13%	7%	14%	7%	32%	11%	5%	8%	14%	7%	13%	16%	12%	11%				
		24%	32%	45%	18%	36%	29%	15%	46%	23%	ilmops34%	12%	11%	42%	46%	23%	58%	43%	7%	100%				
We've only ever had IP based services/ we have not moved services	20	10	2	8	6	4	3	3	4	5	*	2	3	14	4	5	6	4	1	20				
	9%	20%	3%	8%	15%	7%	5%	7%	5%	7%	2%	8%	7%	12%	5%	7%	6%	6%	11%	9%				
		bc																						
		51%	10%	38%	29%	22%	13%	17%	19%	27%	2%	10%	17%	71%	19%	27%	29%	18%	7%	100%				
Don't know	16	3	6	8	3	4	1	6	5	6	1	2	4	9	5	6	7	1	1	16				
	8%	5%	8%	8%	7%	6%	3%	11%	7%	8%	3%	7%	9%	8%	7%	8%	7%	2%	6%	8%				
		16%	35%	49%	17%	25%	9%	34%	32%	38%	5%	11%	27%	57%	32%	38%	43%	6%	5%	100%				

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 81**

## **E4. Has implementing IP saved you money on your regular bills? (SINGLE CODE)**

Base : Those who use IP-based alternatives

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	b	c	d	*e	f	*g	h	i	j	*k	l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	218	52	33	133	45	22	39	22	154	64	72	13	71	1	88	130	87	120
Effective Weighted Sample	197	41	32	125	40	16	38	22	141	57	61	12	60	1	80	118	79	110
Total	216	44	31	141	37	21	35	20	158	58	65	10	64	1	95	121	97	108
		20%	14%	65%	17%	10%	16%	9%	73%	27%	30%	5%	30%	*%	44%	56%	45%	50%
Yes	156	30	25	101	29	12	30	14	118	38	51	4	51	1	68	88	64	89
	72%	68%	81%	72%	80%	58%	85%	70%	75%	64%	79%	35%	79%	100%	71%	73%	66%	82%
		19%	16%	65%	19%	8%	19%	9%	76%	24%	33%	2%	32%	1%	44%	56%	41%	p
No	23	10	2	12	4	5	3	1	12	11	10	1	10	-	9	15	12	10
	11%	22%	6%	8%	12%	26%	7%	5%	8%	19%	16%	14%	16%	-%	9%	12%	12%	9%
		c								h								
		42%	8%	50%	19%	23%	11%	4%	53%	47%	44%	6%	44%	-%	38%	62%	51%	43%
We've only ever had IP based services/ we have not moved services	20	2	3	15	1	2	2	3	14	6	1	4	1	-	14	7	15	5
	9%	5%	10%	11%	2%	11%	5%	14%	9%	11%	2%	40%	2%	-%	14%	6%	15%	4%
		10%	15%	75%	4%	11%	9%	14%	69%	31%	5%	20%	5%	-%	67%	33%	q	23%
Don't know	16	2	1	13	2	1	1	2	13	4	2	1	2	-	5	11	6	5
	8%	5%	3%	9%	6%	5%	2%	11%	8%	6%	3%	10%	3%	-%	5%	9%	6%	4%
		14%	6%	80%	14%	6%	5%	13%	78%	22%	14%	6%	14%	-%	31%	69%	38%	29%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 81**

## **E4. Has implementing IP saved you money on your regular bills? (SINGLE CODE)**

Base : Those who use IP-based alternatives

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
	NEVER			YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
	LAST YEAR	EVER	/DK															
Significance Level: 95%	*a	b	*c	d	*e	*f	*g	h	*i	*j	*k	l	m	n	o	p	q	r
Unweighted total	218	19	48	18	63	15	-	63	20	-	-	88	155	92	82	127	156	62
Effective Weighted Sample	197	18	40	15	53	14	-	53	18	-	-	77	143	85	74	116	140	57
Total	216	15	45	14	55	14	-	57	17	-	-	84	151	85	88	121	153	63
	7%	21%	7%	25%	7%	-	-	26%	8%	-	-	39%	70%	39%	41%	56%	71%	29%
Yes	156	15	31	9	43	10	-	44	10	-	-	72	119	64	65	90	125	31
	72%	100%	68%	63%	78%	70%	-	77%	62%	-	-	85%	79%	75%	74%	74%	82%	50%
		10%	20%	6%	27%	7%	-	28%	7%	-	-	46%	76%	41%	42%	58%	80%	20%
No	23	-	10	2	9	1	-	10	2	-	-	7	11	8	11	12	12	11
	11%	-	22%	11%	16%	5%	-	17%	10%	-	-	9%	7%	10%	12%	10%	8%	17%
		-	43%	7%	39%	3%	-	43%	7%	-	-	31%	48%	35%	47%	53%	53%	47%
We've only ever had IP based services/ we have not moved services	20	-	4	1	3	2	-	2	3	-	-	3	14	9	8	12	10	10
	9%	-	8%	10%	5%	17%	-	4%	17%	-	-	4%	10%	10%	10%	10%	6%	17%
		-	18%	7%	13%	12%	-	11%	14%	-	-	17%	71%	44%	41%	59%	48%	52%
Don't know	16	-	1	2	*	1	-	1	2	-	-	2	7	4	4	7	6	10
	8%	-	2%	15%	1%	7%	-	2%	11%	-	-	2%	5%	5%	4%	5%	4%	17%
		-	6%	14%	3%	6%	-	6%	11%	-	-	11%	43%	27%	23%	41%	36%	64%
Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																		

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 82

## E5. Approximately how much money have you saved per month by moving to IP services? (SINGLE CODE)

Base : Those mostly using IP who say implementing IP has saved them money on regular bills

		COMPANY SIZE				TURNOVER				TELECOMS PROVISION											
		Total	UNDER			OVER			ISDN2	ISDN30		ISDN2 ONLY	ISDN30		IP NOT ISDN	ISDN30		IP SWITCHED		IP NOT SWITCHED	ANY IP
			1-49	50-249	250+	£1M-	£21M-£100M	£100M		ISDN2	ONLY		ONLY	BOTH		ISDN	ISDN2 & IP	& IP	ISDN		
Significance Level: 95%			*a	*b	c	*d	e	*f	*g	*h	*i	*j	*k	*l	m	*n	*o	*p	*q	*r	s
Unweighted total		96	19	25	51	17	34	23	21	19	17	8	6	11	71	19	17	25	-	-	96
Effective Weighted Sample		89	19	25	48	16	32	21	20	17	17	6	6	11	69	17	17	23	-	-	89
Total		101	25	32	44	21	39	21	19	13	14	4	5	9	83	13	14	18	-	-	101
			25%	32%	43%	21%	38%	21%	19%	13%	14%	4%	5%	9%	82%	13%	14%	18%	-%	-%	100%
Less than £250	(0.2)	8	7	1	-	5	3	-	-	-	-	-	-	-	8	-	-	-	-	-	8
		8%	27%	4%	-%	26%	7%	-%	-%	-%	-%	-%	-%	-%	10%	-%	-%	-%	-%	-%	8%
			84%	16%	-%	68%	32%	-%	-%	-%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	100%
£250 - £499	(0.4)	14	8	3	3	7	4	2	1	-	-	-	-	-	14	-	-	-	-	-	14
		13%	31%	8%	7%	32%	9%	11%	5%	-%	-%	-%	-%	-%	16%	-%	-%	-%	-%	-%	13%
			59%	19%	22%	49%	27%	17%	7%	-%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	100%
£500 - £999	(0.8)	9	1	4	4	1	5	1	1	1	2	-	1	1	7	1	2	2	-	-	9
		9%	5%	12%	8%	6%	14%	5%	5%	6%	11%	-%	16%	9%	9%	6%	11%	9%	-%	-%	9%
			14%	45%	41%	14%	63%	11%	11%	9%	18%	-%	9%	9%	82%	9%	18%	18%	-%	-%	100%
£1,000 - £2,499	(1.8)	16	4	6	5	5	6	2	3	2	3	1	1	2	12	2	3	3	-	-	16
		16%	16%	19%	12%	25%	16%	8%	13%	18%	19%	19%	21%	18%	15%	18%	19%	19%	-%	-%	16%
			26%	40%	34%	33%	40%	11%	16%	15%	17%	5%	7%	10%	78%	15%	17%	22%	-%	-%	100%
£2,500 - £4,999	(3.8)	12	-	7	5	-	5	4	3	2	1	2	1	-	9	2	1	3	-	-	12
		12%	-%	21%	12%	-%	12%	19%	15%	14%	6%	42%	16%	-%	11%	14%	6%	14%	-%	-%	12%
			-%	56%	44%	-%	40%	35%	25%	15%	7%	15%	7%	-%	78%	15%	7%	22%	-%	-%	100%
£5,000 - £9,999	(7.5)	8	1	3	4	1	1	6	-	2	2	-	-	2	6	2	2	2	-	-	8
		8%	5%	8%	10%	6%	3%	27%	-%	18%	17%	-%	-%	27%	7%	18%	17%	13%	-%	-%	8%
			15%	32%	53%	15%	16%	69%	-%	29%	29%	-%	-%	29%	71%	29%	29%	29%	-%	-%	100%
£10,000 - £19,999	(15.0)	9	1	2	5	-	6	3	-	1	2	-	1	1	7	1	2	2	-	-	9
		8%	6%	7%	11%	-%	15%	13%	-%	8%	13%	-%	16%	12%	8%	8%	13%	10%	-%	-%	8%
			17%	27%	56%	-%	67%	33%	-%	12%	21%	-%	9%	12%	79%	12%	21%	21%	-%	-%	100%
£20,000 - £49,999	(35.0)	4	-	3	1	-	3	-	1	*	-	*	-	-	4	*	-	*	-	-	4
		4%	-%	8%	3%	-%	8%	-%	5%	3%	-%	10%	-%	-%	4%	3%	-%	2%	-%	-%	4%
			-%	65%	35%	-%	75%	-%	25%	10%	-%	10%	-%	-%	90%	10%	-%	10%	-%	-%	100%
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																					



# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 82

## E5. Approximately how much money have you saved per month by moving to IP services? (SINGLE CODE)

Base : Those mostly using IP who say implementing IP has saved them money on regular bills

		COMPANY SIZE				TURNOVER				TELECOMS PROVISION													
						UNDER				ISDN30							ISDN30		IP SWITCHED		IP NOT SWITCHED		
		Total	1-49	50-249	250+	£1M	£1M-£20M	£21M-£100M	OVER £100M	ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	ISDN	ISDN	ANY		
			*a	*b	c	*d	e	*f	*g	*h	*i	*j	*k	*l	m	*n	*o	*p	*q	*r	s		
Significance Level: 95%																							
Unweighted total		96	19	25	51	17	34	23	21	19	17	8	6	11	71	19	17	25	-	-	96		
Effective Weighted Sample		89	19	25	48	16	32	21	20	17	17	6	6	11	69	17	17	23	-	-	89		
Total		101	25	32	44	21	39	21	19	13	14	4	5	9	83	13	14	18	-	-	101		
			25%	32%	43%	21%	38%	21%	19%	13%	14%	4%	5%	9%	82%	13%	14%	18%	-%	-%	100%		
£50,000 - £99,999		(75.0)	10	-	1	8	1	3	1	5	2	2	-	1	2	7	2	2	2	-	-	10	
		10%	-	4%	19%	5%	9%	4%	24%	12%	17%	-%	16%	18%	9%	12%	17%	13%	-%	-%	10%		
			-%	13%	87%	10%	34%	8%	47%	16%	25%	-%	8%	16%	75%	16%	25%	25%	-%	-%	100%		
£100,000 - £249,999		(175.0)	1	-	1	-	-	-	1	1	1	-	-	1	-	1	1	1	-	-	1		
		1%	-%	-%	2%	-%	-%	-%	4%	6%	6%	-%	-%	9%	-%	6%	6%	4%	-%	-%	1%		
			-%	-%	100%	-%	-%	-%	100%	100%	100%	-%	-%	100%	-%	100%	100%	100%	-%	-%	100%		
£250,000 - £499,999		(375.0)	1	-	1	-	-	-	1	-	-	-	-	-	1	-	-	-	-	-	1		
		1%	-%	-%	2%	-%	-%	-%	5%	-%	-%	-%	-%	-%	1%	-%	-%	-%	-%	-%	1%		
			-%	-%	100%	-%	-%	-%	100%	-%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	100%		
£500,000 - £999,999		(750.0)	1	-	1	-	-	-	1	1	1	-	-	1	-	1	1	1	-	-	1		
		1%	-%	-%	2%	-%	-%	-%	4%	6%	6%	-%	-%	9%	-%	6%	6%	4%	-%	-%	1%		
			-%	-%	100%	-%	-%	-%	100%	100%	100%	-%	-%	100%	-%	100%	100%	100%	-%	-%	100%		
£5m or more		(5500.0)	1	-	1	-	-	-	1	-	-	-	-	-	1	-	-	-	-	-	1		
		1%	-%	-%	2%	-%	-%	-%	5%	-%	-%	-%	-%	-%	1%	-%	-%	-%	-%	-%	1%		
			-%	-%	100%	-%	-%	-%	100%	-%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	100%		
Don't know		9	3	3	4	-	3	3	3	1	1	1	1	-	7	1	1	2	-	-	9		
		9%	10%	8%	9%	-%	7%	14%	14%	9%	6%	29%	16%	-%	9%	9%	6%	11%	-%	-%	9%		
			29%	28%	43%	-%	29%	31%	29%	13%	8%	13%	8%	-%	78%	13%	8%	22%	-%	-%	100%		
Mean amount in £000s		84.0	1.9	9.6	186.6	4.7	13.4	8.9	417.9	75.7	73.3	7.5	18.2	99.2	89.0	75.7	73.3	60.9	-	-	84.0		
Standard deviation		575.95	3.85	17.35	872.50	16.27	22.16	15.16	1332.1	192.98	184.33	13.37	31.88	221.75	630.75	192.98	184.33	166.89	-	-	575.95		
Standard error		62.11	.93	3.62	130.07	3.95	3.92	3.48	313.99	48.24	46.08	5.98	14.26	66.86	78.24	48.24	46.08	36.42	-	-	62.11		

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 82

## E5. Approximately how much money have you saved per month by moving to IP services? (SINGLE CODE)

Base : Those mostly using IP who say implementing IP has saved them money on regular bills

		MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
			*a	*b	c	*d	*e	*f	*g	h	*i	*j	*k	*l	*m	n	o	p	q
Significance Level: 95%																			
Unweighted total		96	-	-	96	-	-	-	-	74	22	-	-	-	-	39	57	47	45
Effective Weighted Sample		89	-	-	89	-	-	-	-	70	19	-	-	-	-	37	52	44	42
Total		101	-	-	101	-	-	-	-	80	21	-	-	-	-	44	57	54	43
			-%	-%	100%	-%	-%	-%	-%	79%	21%	-%	-%	-%	-%	43%	57%	54%	43%
Less than £250	(0.2)	8	-	-	8	-	-	-	-	4	4	-	-	-	-	4	4	8	-
		8%	-%	-%	8%	-%	-%	-%	-%	5%	19%	-%	-%	-%	-%	9%	7%	15%	-%
			-%	-%	100%	-%	-%	-%	-%	49%	51%	-%	-%	-%	-%	49%	51%	100%	-%
£250 - £499	(0.4)	14	-	-	14	-	-	-	-	12	1	-	-	-	-	5	9	11	2
		13%	-%	-%	13%	-%	-%	-%	-%	15%	6%	-%	-%	-%	-%	12%	15%	21%	6%
			-%	-%	100%	-%	-%	-%	-%	90%	10%	-%	-%	-%	-%	37%	63%	82%	18%
£500 - £999	(0.8)	9	-	-	9	-	-	-	-	9	-	-	-	-	-	5	3	7	2
		9%	-%	-%	9%	-%	-%	-%	-%	11%	-%	-%	-%	-%	-%	12%	6%	13%	4%
			-%	-%	100%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	62%	38%	80%	20%
£1,000 - £2,499	(1.8)	16	-	-	16	-	-	-	-	14	2	-	-	-	-	8	8	10	4
		16%	-%	-%	16%	-%	-%	-%	-%	18%	8%	-%	-%	-%	-%	19%	13%	18%	9%
			-%	-%	100%	-%	-%	-%	-%	89%	11%	-%	-%	-%	-%	52%	48%	62%	25%
£2,500 - £4,999	(3.8)	12	-	-	12	-	-	-	-	6	5	-	-	-	-	3	8	5	6
		12%	-%	-%	12%	-%	-%	-%	-%	8%	25%	-%	-%	-%	-%	7%	15%	10%	15%
			-%	-%	100%	-%	-%	-%	-%	54%	46%	-%	-%	-%	-%	28%	72%	45%	55%
£5,000 - £9,999	(7.5)	8	-	-	8	-	-	-	-	7	2	-	-	-	-	4	5	6	2
		8%	-%	-%	8%	-%	-%	-%	-%	8%	7%	-%	-%	-%	-%	8%	8%	11%	5%
			-%	-%	100%	-%	-%	-%	-%	81%	19%	-%	-%	-%	-%	43%	57%	72%	28%
£10,000 - £19,999	(15.0)	9	-	-	9	-	-	-	-	4	4	-	-	-	-	8	1	1	7
		8%	-%	-%	8%	-%	-%	-%	-%	5%	21%	-%	-%	-%	-%	18%	1%	2%	17%
			-%	-%	100%	-%	-%	-%	-%	48%	52%	-%	-%	-%	-%	91%	9%	12%	88%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																			

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 82

## E5. Approximately how much money have you saved per month by moving to IP services? (SINGLE CODE)

Base : Those mostly using IP who say implementing IP has saved them money on regular bills

		MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR		SPEND ON COMMS			
			ISDN2	ISDN30	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY			YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	UNDER £100K	UNDER £100K+
		Total	*a	*b	c	*d	*e	*f	*g	h	*i	*j	*k	*l	*m	n	o	p	q	
Significance Level: 95%																				
Unweighted total		96	-	-	96	-	-	-	-	74	22	-	-	-	-	39	57	47	45	
Effective Weighted Sample		89	-	-	89	-	-	-	-	70	19	-	-	-	-	37	52	44	42	
Total		101	-	-	101	-	-	-	-	80	21	-	-	-	-	44	57	54	43	
			-%	-%	100%	-%	-%	-%	-%	79%	21%	-%	-%	-%	-%	43%	57%	54%	43%	
£20,000 - £49,999	(35.0)	4	-	-	4	-	-	-	-	4	-	-	-	-	-	-	4	1	3	
		4%	-%	-%	4%	-%	-%	-%	-%	5%	-%	-%	-%	-%	-%	-%	7%	2%	6%	
			-%	-%	100%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	-%	100%	32%	68%	
£50,000 - £99,999	(75.0)	10	-	-	10	-	-	-	-	9	1	-	-	-	-	5	5	1	9	
		10%	-%	-%	10%	-%	-%	-%	-%	11%	4%	-%	-%	-%	-%	12%	8%	2%	20%	
			-%	-%	100%	-%	-%	-%	-%	92%	8%	-%	-%	-%	-%	53%	47%	10%	p 90%	
£100,000 - £249,999	(175.0)	1	-	-	1	-	-	-	-	1	-	-	-	-	-	-	1	-	1	
		1%	-%	-%	1%	-%	-%	-%	-%	1%	-%	-%	-%	-%	-%	-%	1%	-%	2%	
			-%	-%	100%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	-%	100%	-%	100%	
£250,000 - £499,999	(375.0)	1	-	-	1	-	-	-	-	1	-	-	-	-	-	-	1	-	1	
		1%	-%	-%	1%	-%	-%	-%	-%	1%	-%	-%	-%	-%	-%	-%	2%	-%	2%	
			-%	-%	100%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	-%	100%	-%	100%	
£500,000 - £999,999	(750.0)	1	-	-	1	-	-	-	-	1	-	-	-	-	-	-	1	-	1	
		1%	-%	-%	1%	-%	-%	-%	-%	1%	-%	-%	-%	-%	-%	-%	1%	-%	2%	
			-%	-%	100%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	-%	100%	-%	100%	
£5m or more	(5500.0)	1	-	-	1	-	-	-	-	1	-	-	-	-	-	-	1	-	1	
		1%	-%	-%	1%	-%	-%	-%	-%	1%	-%	-%	-%	-%	-%	-%	2%	-%	2%	
			-%	-%	100%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	-%	100%	-%	100%	
Don't know		9	-	-	9	-	-	-	-	7	2	-	-	-	-	2	8	4	4	
		9%	-%	-%	9%	-%	-%	-%	-%	9%	10%	-%	-%	-%	-%	4%	13%	7%	9%	
			-%	-%	100%	-%	-%	-%	-%	77%	23%	-%	-%	-%	-%	18%	82%	43%	42%	
Mean amount in £000s		84.0	-	-	84.0	-	-	-	-	104.2	8.4	-	-	-	-	13.2	144.5	4.5	190.4	
Standard deviation		575.95	-	-	575.95	-	-	-	-	647.47	15.25	-	-	-	-	23.73	782.36	11.76	875.33	
Standard error		62.11	-	-	62.11	-	-	-	-	79.10	3.50	-	-	-	-	3.90	111.77	1.77	138.40	
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																				

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 82

## E5. Approximately how much money have you saved per month by moving to IP services? (SINGLE CODE)

Base : Those mostly using IP who say implementing IP has saved them money on regular bills

		SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
		NEVER							UP TO 3 YEARS	4+ YEARS			SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
		LAST YEAR	EVER	/DK	YES	NO	YES	NO/DK			YES	NO/DK							
		*a	*b	*c	*d	*e	*f	*g	*h	*i	*j	*k	l	m	n	o	p	q	*r
Significance Level: 95%																			
Unweighted total		96	-	-	-	-	-	-	-	-	-	-	36	73	35	39	55	77	19
Effective Weighted Sample		89	-	-	-	-	-	-	-	-	-	-	33	68	33	38	50	72	18
Total		101	-	-	-	-	-	-	-	-	-	-	36	76	35	44	56	80	21
			-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	36%	75%	34%	44%	55%	79%	21%
Less than £250	(0.2)	8	-	-	-	-	-	-	-	-	-	-	1	6	-	4	4	4	4
		8%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	3%	7%	-%	9%	8%	5%	18%
			-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	16%	69%	-%	47%	53%	51%	49%
£250 - £499	(0.4)	14	-	-	-	-	-	-	-	-	-	-	1	12	2	6	8	7	6
		13%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	4%	16%	7%	14%	13%	9%	30%
			-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	10%	90%	17%	45%	55%	53%	47%
£500 - £999	(0.8)	9	-	-	-	-	-	-	-	-	-	-	3	7	4	5	3	6	2
		9%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	7%	9%	11%	12%	6%	8%	11%
			-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	30%	77%	44%	62%	38%	74%	26%
£1,000 - £2,499	(1.8)	16	-	-	-	-	-	-	-	-	-	-	7	10	6	8	7	11	5
		16%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	20%	13%	17%	19%	13%	14%	22%
			-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	45%	64%	37%	52%	48%	69%	31%
£2,500 - £4,999	(3.8)	12	-	-	-	-	-	-	-	-	-	-	2	10	3	5	7	11	1
		12%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	7%	13%	10%	11%	12%	13%	6%
			-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	20%	83%	30%	42%	58%	90%	10%
£5,000 - £9,999	(7.5)	8	-	-	-	-	-	-	-	-	-	-	4	7	6	4	4	8	-
		8%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	11%	9%	17%	9%	7%	10%	-%
			-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	47%	85%	72%	51%	49%	100%	-%
£10,000 - £19,999	(15.0)	9	-	-	-	-	-	-	-	-	-	-	3	6	3	4	5	9	-
		8%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	9%	8%	10%	8%	9%	11%	-%
			-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	39%	72%	40%	44%	56%	100%	-%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 82

## E5. Approximately how much money have you saved per month by moving to IP services? (SINGLE CODE)

Base : Those mostly using IP who say implementing IP has saved them money on regular bills

		SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
		NEVER							UP TO 3 YEARS	4+ YEARS			SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
		LAST YEAR	EVER	/DK	YES	NO	YES	NO/DK			YES	NO/DK							
		*a	*b	*c	*d	*e	*f	*g	*h	*i	*j	*k	l	m	n	o	p	q	*r
Significance Level: 95%																			
Unweighted total		96	-	-	-	-	-	-	-	-	-	-	36	73	35	39	55	77	19
Effective Weighted Sample		89	-	-	-	-	-	-	-	-	-	-	33	68	33	38	50	72	18
Total		101	-	-	-	-	-	-	-	-	-	-	36	76	35	44	56	80	21
			-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	36%	75%	34%	44%	55%	79%	21%
£20,000 - £49,999	(35.0)	4	-	-	-	-	-	-	-	-	-	-	1	2	2	2	2	4	-
		4%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	4%	2%	7%	5%	3%	5%	-%
			-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	32%	43%	57%	57%	43%	100%	-%
£50,000 - £99,999	(75.0)	10	-	-	-	-	-	-	-	-	-	-	5	6	5	4	6	9	1
		10%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	13%	8%	15%	9%	10%	11%	5%
			-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	51%	66%	53%	39%	61%	90%	10%
£100,000 - £249,999	(175.0)	1	-	-	-	-	-	-	-	-	-	-	1	1	1	-	1	1	-
		1%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	2%	1%	2%	-%	1%	1%	-%
			-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	100%	100%	100%	-%	100%	100%	-%
£250,000 - £499,999	(375.0)	1	-	-	-	-	-	-	-	-	-	-	1	1	-	-	1	1	-
		1%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	3%	1%	-%	-%	2%	1%	-%
			-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	100%	100%	-%	-%	100%	100%	-%
£500,000 - £999,999	(750.0)	1	-	-	-	-	-	-	-	-	-	-	1	1	1	-	1	1	-
		1%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	2%	1%	2%	-%	1%	1%	-%
			-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	100%	100%	100%	-%	100%	100%	-%
£5m or more	(5500.0)	1	-	-	-	-	-	-	-	-	-	-	-	1	1	-	1	1	-
		1%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	1%	3%	-%	2%	1%	-%
			-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	100%	100%	-%	100%	100%	-%
Don't know		9	-	-	-	-	-	-	-	-	-	-	5	7	-	2	7	7	2
		9%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	15%	9%	-%	4%	12%	9%	9%
			-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	n	78%	-%	19%	72%	80%	20%
Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																			

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 82

E5. Approximately how much money have you saved per month by moving to IP services? (SINGLE CODE)

Base : Those mostly using IP who say implementing IP has saved them money on regular bills

	Total	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES	HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT			
		LAST YEAR	EVER	NEVER /DK	YES	NO		YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%		*a	*b	*c	*d	*e	*f	*g	*h	*i	*j	*k	l	m	n	o	p	q	*r	
Unweighted total	96	-	-	-	-	-	-	-	-	-	-	-	36	73	35	39	55	77	19	
Effective Weighted Sample	89	-	-	-	-	-	-	-	-	-	-	-	33	68	33	38	50	72	18	
Total	101	-	-	-	-	-	-	-	-	-	-	-	36	76	35	44	56	80	21	
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	36%	75%	34%	44%	55%	79%	21%	
Mean amount in £000s	84.0	-	-	-	-	-	-	-	-	-	-	-	52.7	106.0	195.3	11.6	146.2	105.6	4.7	
Standard deviation	575.95	-	-	-	-	-	-	-	-	-	-	-	136.46	663.66	931.25	21.73	783.05	648.88	16.69	
Standard error	62.11	-	-	-	-	-	-	-	-	-	-	-	24.91	82.32	157.41	3.57	111.86	78.12	4.05	
Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																				

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 83

E5B. Which one of the following best describes your use of analogue telephone lines (fixed telephone lines that are not ISDN lines) after you moved to IP services? (SINGLE CODE)

Base : Those who use IP-based alternatives

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	IP SWITCHED	IP NOT SWITCHED	ANY IP	
					£1M	£1M-£20M	£21M-£100M	OVER £100M												
Significance Level: 95%		a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q	r	s
Unweighted total	218	38	57	122	30	62	57	62	91	85	33	27	58	100	91	85	118	67	16	218
Effective Weighted Sample	197	36	56	115	27	58	53	58	75	84	20	27	57	97	75	84	102	58	14	197
Total	216	51	68	97	38	67	51	52	74	74	25	25	49	116	74	74	100	61	13	216
		24%	32%	45%	18%	31%	24%	24%	34%	34%	12%	12%	23%	54%	34%	34%	46%	28%	6%	100%
Didn't have any analogue line(s) and still don't	28	12	7	10	10	6	8	2	10	10	3	3	7	16	10	10	13	9	2	28
	13%	23%	10%	10%	25%	9%	16%	3%	13%	13%	10%	11%	15%	14%	13%	13%	13%	16%	12%	13%
		41%	24%	35%	eg 34%	22%	g 29%	6%	35%	35%	9%	10%	26%	56%	35%	35%	44%	33%	6%	100%
Didn't have any analogue line(s) but added one or more	41	9	20	12	7	19	11	5	16	13	9	6	7	19	16	13	22	19	4	41
	19%	18%	30%	12%	17%	29%	21%	9%	22%	18%	35%	24%	15%	16%	22%	18%	22%	31% lm	28%	19%
		23%	49%	28%	16%	47%	26%	11%	39%	32%	22%	15%	17%	46%	39%	32%	54%	45%	9%	100%
Had analogue line(s) and kept at least one	94	19	27	47	13	31	20	28	34	39	10	15	24	45	34	39	48	26	6	94
	43%	38%	40%	49%	34%	46%	39%	55%	45%	52%	39%	58%	49%	39%	45%	52%	49%	42%	48%	43%
		21%	29%	50%	14%	33%	21%	30%	36%	41%	10%	16%	25%	48%	36%	41%	52%	27%	7%	100%
Had analogue line(s) but removed all of them	41	8	9	24	5	9	11	15	13	11	3	2	9	26	13	11	14	7	2	41
	19%	16%	13%	25%	13%	13%	22%	28% e	17%	15%	14%	7%	19%	23%	17%	15%	14%	11%	12%	19%
		20%	21%	59%	12%	21%	28%	36%	31%	27%	9%	4%	22%	64%	31%	27%	36%	17%	4%	100%
Don't know	12	3	5	4	4	2	*	3	2	2	*	-	2	10	2	2	2	-	-	12
	5%	5%	8%	4%	11%	3%	1%	5%	3%	2%	2%	-%	3%	8%	3%	2%	2%	-%	-%	5%
		23%	44%	34%	f 34%	19%	4%	22%	17%	13%	4%	-%	13%	pq 83%	17%	13%	17%	-%	-%	100%
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																				

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 83

E5B. Which one of the following best describes your use of analogue telephone lines (fixed telephone lines that are not ISDN lines) after you moved to IP services? (SINGLE CODE)

Base : Those who use IP-based alternatives

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
Significance Level: 95%		a	b	c	d	*e	f	*g	h	i	j	*k	l	*m	n	o	p	q
Unweighted total	218	52	33	133	45	22	39	22	154	64	72	13	71	1	88	130	87	120
Effective Weighted Sample	197	41	32	125	40	16	38	22	141	57	61	12	60	1	80	118	79	110
Total	216	44	31	141	37	21	35	20	158	58	65	10	64	1	95	121	97	108
		20%	14%	65%	17%	10%	16%	9%	73%	27%	30%	5%	30%	*%	44%	56%	45%	50%
Didn't have any analogue line(s) and still don't	28	4	7	17	4	4	8	2	25	3	9	2	9	-	15	14	15	12
	13%	10%	21%	12%	11%	22%	22% i	8%	16%	6%	15%	16%	15%	-%	15%	11%	16%	11%
		16%	23%	61%	14%	16%	27%	6%	88%	12%	33%	6%	33%	-%	52%	48%	54%	43%
Didn't have any analogue line(s) but added one or more	41	15	7	19	9	7	7	6	28	13	18	4	18	-	25	16	20	20
	19%	35%	23%	13%	25%	34%	21%	30%	18%	22%	28%	38%	29%	-%	27%	13%	21%	19%
		c													o			
		37%	17%	46%	22%	17%	18%	14%	69%	31%	45%	9%	45%	-%	62%	38%	48%	49%
Had analogue line(s) and kept at least one	94	18	15	61	18	7	15	9	63	31	28	5	28	-	40	54	41	48
	43%	41%	48%	43%	48%	36%	43%	48%	40%	53%	44%	46%	44%	-%	42%	44%	43%	44%
		19%	16%	65%	19%	8%	16%	10%	67%	33%	30%	5%	30%	-%	43%	57%	44%	51%
Had analogue line(s) but removed all of them	41	6	3	32	6	2	5	3	33	7	8	-	8	1	10	31	12	26
	19%	13%	8%	23%	16%	9%	14%	14%	21%	13%	13%	-%	12%	100%	10%	26%	13%	24%
		14%	6%	79%	14%	4%	12%	7%	82%	18%	21%	-%	19%	2%	24%	76% n	31%	65%
Don't know	12	*	-	11	*	-	-	-	8	4	*	-	*	-	5	7	8	2
	5%	1%	-%	8%	1%	-%	-%	-%	5%	7%	1%	-%	1%	-%	6%	5%	8%	1%
		4%	-%	96%	4%	-%	-%	-%	67%	33%	4%	-%	4%	-%	44%	56%	q 65%	13%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		



# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 83

E5B. Which one of the following best describes your use of analogue telephone lines (fixed telephone lines that are not ISDN lines) after you moved to IP services? (SINGLE CODE)

Base : Those who use IP-based alternatives

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
	NEVER			YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
	LAST YEAR	EVER	/DK															
Significance Level: 95%	*a	b	*c	d	*e	*f	*g	h	*i	*j	*k	l	m	n	o	p	q	r
Unweighted total	218	19	48	18	63	15	-	63	20	-	-	88	155	92	82	127	156	62
Effective Weighted Sample	197	18	40	15	53	14	-	53	18	-	-	77	143	85	74	116	140	57
Total	216	15	45	14	55	14	-	57	17	-	-	84	151	85	88	121	153	63
		7%	21%	7%	25%	7%	-%	26%	8%	-%	-%	39%	70%	39%	41%	56%	71%	29%
Didn't have any analogue line(s) and still don't	28	1	8	2	9	1	-	9	2	-	-	7	20	12	12	16	16	13
	13%	7%	19%	11%	17%	5%	-%	15%	14%	-%	-%	8%	13%	14%	14%	13%	10%	20%
		4%	30%	6%	33%	3%	-%	30%	8%	-%	-%	24%	70%	43%	44%	56%	56%	44%
Didn't have any analogue line(s) but added one or more	41	2	16	4	14	7	-	17	6	-	-	15	23	17	19	22	28	13
	19%	15%	36%	25%	26%	46%	-%	29%	34%	-%	-%	18%	15%	20%	21%	18%	19%	20%
		6%	39%	9%	34%	16%	-%	40%	14%	-%	-%	37%	57%	41%	46%	54%	69%	31%
Had analogue line(s) and kept at least one	94	7	18	7	23	7	-	26	7	-	-	42	69	37	39	52	74	20
	43%	48%	41%	50%	42%	48%	-%	46%	40%	-%	-%	50%	46%	43%	44%	43%	48%	31%
		8%	20%	8%	25%	7%	-%	28%	7%	-%	-%	45%	74%	39%	41%	56%	79%	21%
Had analogue line(s) but removed all of them	41	5	2	2	8	-	-	6	2	-	-	18	32	14	14	26	31	9
	19%	30%	5%	11%	14%	-%	-%	10%	12%	-%	-%	21%	21%	16%	16%	21%	20%	15%
		11%	5%	4%	19%	-%	-%	14%	5%	-%	-%	44%	79%	34%	35%	64%	77%	23%
Don't know	12	-	-	*	*	-	-	-	-	-	-	2	7	5	4	4	3	8
	5%	-%	-%	3%	1%	-%	-%	-%	-%	-%	-%	2%	4%	6%	4%	4%	2%	13%
		-%	-%	4%	4%	-%	-%	-%	-%	-%	-%	18%	57%	43%	30%	38%	29%	71%
Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																		

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 84**

## **E6A. To what extent is your organisation still using any ISDN 2/2e services? (MULTI CODE)**

Base : Those who use ISDN2/2e and IP-based alternatives who do not use ISDN2/2e as their main service

	Total	COMPANY SIZE			TURNOVER				TELECOMS PROVISION										IP SWITCHED	IP NOT SWITCHED	ANY IP
		1-49 *a	50-249 *b	250+ *c	UNDER £1M *d	£1M- £20M *e	£21M-£100M *f	OVER £100M *g	ISDN2 *h	ISDN30 *i	ISDN2 ONLY *j	ISDN30 ONLY *k	BOTH ISDN *l	IP NOT ISDN *m	ISDN2 & IP *n	ISDN30 & IP *o	ISDN & IP *p				
																		ISDN *q			
Significance Level: 95%																					
Unweighted total	24	-	2	22	-	3	11	10	24	15	9	-	15	-	24	15	24	-	-	24	
Effective Weighted Sample	22	-	2	20	-	3	9	10	22	15	7	-	15	-	22	15	22	-	-	22	
Total	17	-	2	14	-	2	8	7	17	12	5	-	12	-	17	12	17	-	-	17	
		-%	14%	86%	-%	10%	48%	43%	100%	72%	28%	-%	72%	-%	100%	72%	100%	-%	-%	100%	
A back-up system in case your main system fails	9	-	1	8	-	1	6	2	9	6	3	-	6	-	9	6	9	-	-	9	
	53%	-%	57%	53%	-%	49%	77%	28%	53%	52%	56%	-%	52%	-%	53%	52%	53%	-%	-%	53%	
		-%	16%	84%	-%	9%	69%	22%	100%	70%	30%	-%	70%	-%	100%	70%	100%	-%	-%	100%	
A supplementary service used in addition to your main service	9	-	1	8	-	1	3	4	9	7	2	-	7	-	9	7	9	-	-	9	
	51%	-%	43%	53%	-%	74%	43%	56%	51%	54%	44%	-%	54%	-%	51%	54%	51%	-%	-%	51%	
		-%	12%	88%	-%	14%	40%	46%	100%	76%	24%	-%	76%	-%	100%	76%	100%	-%	-%	100%	
Not at all	1	-	-	1	-	*	-	1	1	1	*	-	1	-	1	1	1	-	-	1	
	7%	-%	-%	8%	-%	26%	-%	11%	7%	7%	9%	-%	7%	-%	7%	7%	7%	-%	-%	7%	
		-%	-%	100%	-%	35%	-%	65%	100%	65%	35%	-%	65%	-%	100%	65%	100%	-%	-%	100%	
Don't know	2	-	-	2	-	-	-	2	2	2	-	-	2	-	2	2	2	-	-	2	
	9%	-%	-%	11%	-%	-%	-%	22%	9%	13%	-%	-%	13%	-%	9%	13%	9%	-%	-%	9%	
		-%	-%	100%	-%	-%	-%	100%	100%	100%	-%	-%	100%	-%	100%	100%	100%	-%	-%	100%	

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 84

## E6A. To what extent is your organisation still using any ISDN 2/2e services? (MULTI CODE)

Base : Those who use ISDN2/2e and IP-based alternatives who do not use ISDN2/2e as their main service

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		*a	*b	*c	*d	*e	*f	*g	*h	*i	*j	*k	*l	*m	*n	*o	*p	*q
Significance Level: 95%																		
Unweighted total	24	-	-	24	-	-	-	-	16	8	-	-	-	-	5	19	5	17
Effective Weighted Sample	22	-	-	22	-	-	-	-	14	7	-	-	-	-	4	17	5	15
Total	17	-	-	17	-	-	-	-	12	5	-	-	-	-	3	13	4	12
		-%	-%	100%	-%	-%	-%	-%	69%	31%	-%	-%	-%	-%	20%	80%	23%	70%
A back-up system in case your main system fails	9	-	-	9	-	-	-	-	7	2	-	-	-	-	2	7	3	5
	53%	-%	-%	53%	-%	-%	-%	-%	60%	38%	-%	-%	-%	-%	58%	52%	73%	42%
		-%	-%	100%	-%	-%	-%	-%	78%	22%	-%	-%	-%	-%	22%	78%	31%	55%
A supplementary service used in addition to your main service	9	-	-	9	-	-	-	-	7	1	-	-	-	-	2	6	2	6
	51%	-%	-%	51%	-%	-%	-%	-%	64%	24%	-%	-%	-%	-%	65%	48%	48%	54%
		-%	-%	100%	-%	-%	-%	-%	85%	15%	-%	-%	-%	-%	26%	74%	21%	74%
Not at all	1	-	-	1	-	-	-	-	*	1	-	-	-	-	-	1	-	1
	7%	-%	-%	7%	-%	-%	-%	-%	4%	15%	-%	-%	-%	-%	-%	9%	-%	10%
		-%	-%	100%	-%	-%	-%	-%	35%	65%	-%	-%	-%	-%	-%	100%	-%	100%
Don't know	2	-	-	2	-	-	-	-	-	2	-	-	-	-	-	2	-	2
	9%	-%	-%	9%	-%	-%	-%	-%	-%	30%	-%	-%	-%	-%	-%	12%	-%	13%
		-%	-%	100%	-%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	100%	-%	100%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 84**

## **E6A. To what extent is your organisation still using any ISDN 2/2e services? (MULTI CODE)**

Base : Those who use ISDN2/2e and IP-based alternatives who do not use ISDN2/2e as their main service

	Total	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
		NEVER			YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
		LAST YEAR	EVER	/DK															
Significance Level: 95%		*a	*b	*c	*d	*e	*f	*g	*h	*i	*j	*k	*l	*m	*n	*o	*p	*q	*r
Unweighted total	24	-	-	-	-	-	-	-	-	-	-	-	13	20	12	5	15	19	5
Effective Weighted Sample	22	-	-	-	-	-	-	-	-	-	-	-	12	18	11	5	13	17	5
Total	17	-	-	-	-	-	-	-	-	-	-	-	9	14	9	4	11	14	3
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	54%	81%	53%	23%	64%	81%	19%
A back-up system in case your main system fails	9	-	-	-	-	-	-	-	-	-	-	-	5	7	6	2	6	7	2
	53%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	53%	48%	66%	60%	57%	54%	51%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	53%	74%	66%	26%	69%	82%	18%
A supplementary service used in addition to your main service	9	-	-	-	-	-	-	-	-	-	-	-	5	8	6	2	6	7	2
	51%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	56%	58%	69%	40%	54%	52%	49%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	58%	91%	72%	18%	67%	82%	18%
Not at all	1	-	-	-	-	-	-	-	-	-	-	-	-	1	-	1	*	1	-
	7%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	9%	-%	20%	4%	9%	-%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	100%	-%	65%	35%	100%	-%
Don't know	2	-	-	-	-	-	-	-	-	-	-	-	1	1	-	-	1	1	1
	9%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	9%	6%	-%	-%	7%	6%	25%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	50%	50%	-%	-%	50%	50%	50%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 85**

## **E6B. To what extent is your organisation still using any ISDN30 services? (MULTI CODE)**

Base : Those who use ISDN30 and IP-based alternatives who do not use ISDN30 as their main service

	Total	COMPANY SIZE			TURNOVER				TELECOMS PROVISION											
		1-49 *a	50-249 *b	250+ *c	UNDER				ISDN2 *h	ISDN30 *i	ISDN2 ONLY *j	ISDN30 ONLY *k	BOTH ISDN *l	IP NOT ISDN *m	ISDN2 & IP *n	ISDN30 & IP *o	ISDN & IP *p	IP SWITCHED	IP NOT SWITCHED	ANY IP *s
					£1M *d	£1M- £20M *e	£21M-£10 0M *f	OVER £100M *g										ISDN *q	ISDN *r	
Significance Level: 95%																				
Unweighted total	24	-	4	20	-	4	11	9	15	24	-	9	15	-	15	24	24	-	-	24
Effective Weighted Sample	24	-	4	20	-	4	11	9	15	24	-	9	15	-	15	24	24	-	-	24
Total	20	-	4	16	-	3	9	7	12	20	-	8	12	-	12	20	20	-	-	20
		-%	21%	79%	-%	17%	47%	36%	61%	100%	-%	39%	61%	-%	61%	100%	100%	-%	-%	100%
A supplementary service used in addition to your main service	10	-	2	8	-	2	6	2	6	10	-	4	6	-	6	10	10	-	-	10
	50%	-%	50%	50%	-%	46%	64%	33%	48%	50%	-%	53%	48%	-%	48%	50%	50%	-%	-%	50%
		-%	21%	79%	-%	16%	60%	24%	58%	100%	-%	42%	58%	-%	58%	100%	100%	-%	-%	100%
A back-up system in case your main system fails	8	-	1	7	-	2	4	2	4	8	-	4	4	-	4	8	8	-	-	8
	41%	-%	25%	45%	-%	46%	45%	33%	33%	41%	-%	53%	33%	-%	33%	41%	41%	-%	-%	41%
		-%	13%	87%	-%	19%	51%	29%	49%	100%	-%	51%	49%	-%	49%	100%	100%	-%	-%	100%
Not at all	3	-	1	2	-	1	-	2	2	3	-	1	2	-	2	3	3	-	-	3
	13%	-%	25%	10%	-%	30%	-%	22%	13%	13%	-%	13%	13%	-%	13%	13%	13%	-%	-%	13%
		-%	40%	60%	-%	40%	-%	60%	60%	100%	-%	40%	60%	-%	60%	100%	100%	-%	-%	100%
Don't know	2	-	-	2	-	-	-	2	2	2	-	-	2	-	2	2	2	-	-	2
	8%	-%	-%	10%	-%	-%	-%	22%	13%	8%	-%	-%	13%	-%	13%	8%	8%	-%	-%	8%
		-%	-%	100%	-%	-%	-%	100%	100%	100%	-%	-%	100%	-%	100%	100%	100%	-%	-%	100%

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 85**

**E6B. To what extent is your organisation still using any ISDN30 services? (MULTI CODE)**

Base : Those who use ISDN30 and IP-based alternatives who do not use ISDN30 as their main service

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30		ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
Significance Level: 95%		*a	*b	*c	*d	*e	*f	*g	*h	*i	*j	*k	*l	*m	*n	*o	*p	*q
Unweighted total	24	-	-	24	-	-	-	-	18	6	-	-	-	-	6	18	7	14
Effective Weighted Sample	24	-	-	24	-	-	-	-	18	6	-	-	-	-	6	18	7	14
Total	20	-	-	20	-	-	-	-	15	5	-	-	-	-	5	15	6	11
		-%	-%	100%	-%	-%	-%	-%	76%	24%	-%	-%	-%	-%	26%	74%	31%	56%
A supplementary service used in addition to your main service	10	-	-	10	-	-	-	-	8	2	-	-	-	-	3	7	3	6
	50%	-%	-%	50%	-%	-%	-%	-%	50%	50%	-%	-%	-%	-%	50%	50%	54%	50%
		-%	-%	100%	-%	-%	-%	-%	76%	24%	-%	-%	-%	-%	26%	74%	34%	56%
A back-up system in case your main system fails	8	-	-	8	-	-	-	-	7	1	-	-	-	-	2	6	2	6
	41%	-%	-%	41%	-%	-%	-%	-%	48%	17%	-%	-%	-%	-%	45%	39%	29%	50%
		-%	-%	100%	-%	-%	-%	-%	90%	10%	-%	-%	-%	-%	29%	71%	22%	68%
Not at all	3	-	-	3	-	-	-	-	2	1	-	-	-	-	1	2	1	1
	13%	-%	-%	13%	-%	-%	-%	-%	12%	17%	-%	-%	-%	-%	20%	11%	16%	7%
		-%	-%	100%	-%	-%	-%	-%	70%	30%	-%	-%	-%	-%	40%	60%	40%	30%
Don't know	2	-	-	2	-	-	-	-	-	2	-	-	-	-	-	2	-	2
	8%	-%	-%	8%	-%	-%	-%	-%	-%	33%	-%	-%	-%	-%	-%	11%	-%	14%
		-%	-%	100%	-%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	100%	-%	100%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 85**

## **E6B. To what extent is your organisation still using any ISDN30 services? (MULTI CODE)**

Base : Those who use ISDN30 and IP-based alternatives who do not use ISDN30 as their main service

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
	NEVER			YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
	LAST YEAR	EVER	/DK															
Significance Level: 95%	*a	*b	*c	*d	*e	*f	*g	*h	*i	*j	*k	*l	*m	*n	*o	*p	*q	*r
Unweighted total	24	-	-	-	-	-	-	-	-	-	-	12	16	14	8	14	18	6
Effective Weighted Sample	24	-	-	-	-	-	-	-	-	-	-	12	16	14	8	14	18	6
Total	20	-	-	-	-	-	-	-	-	-	-	10	13	12	7	12	15	5
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	50%	67%	58%	33%	59%	75%	25%
A supplementary service used in addition to your main service	10	-	-	-	-	-	-	-	-	-	-	7	8	7	4	6	8	2
	50%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	66%	57%	64%	60%	51%	51%	48%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	66%	76%	74%	40%	60%	76%	24%
A back-up system in case your main system fails	8	-	-	-	-	-	-	-	-	-	-	2	7	6	1	7	6	3
	41%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	24%	49%	48%	12%	56%	37%	52%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	29%	81%	68%	10%	81%	68%	32%
Not at all	3	-	-	-	-	-	-	-	-	-	-	2	1	1	2	1	3	-
	13%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	18%	6%	9%	28%	7%	17%	-%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	70%	30%	40%	70%	30%	100%	-%
Don't know	2	-	-	-	-	-	-	-	-	-	-	1	1	-	-	1	1	1
	8%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	8%	6%	-%	-%	7%	5%	16%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	50%	50%	-%	-%	50%	50%	50%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 86**

**E7AA. What does your organisation still use your ISDN2/2e service for? (MULTI CODE)**

Base : Those who use ISDN2/2e as a supplementary service in addition to their main service

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											IP SWITCHED		IP NOT SWITCHED		ANY IP
	Total	1-49 *a	50-249 *b	250+ *c	UNDER				ISDN2 *h	ISDN30 *i	ISDN2 ONLY *j	ISDN30 ONLY *k	BOTH ISDN *l	IP NOT ISDN *m	ISDN2 & IP *n	ISDN30 & IP *o	ISDN & IP *p	ISDN *q	ISDN *r					
					£1M *d	£1M-£20M *e	£21M-£100M *f	OVER £100M *g																
Significance Level: 95%																								
Unweighted total	13	-	1	12	-	2	5	6	13	8	5	-	8	-	13	8	13	-	-	13				
Effective Weighted Sample	12	-	1	11	-	2	4	6	12	8	5	-	8	-	12	8	12	-	-	12				
Total	9	-	1	8	-	1	3	4	9	7	2	-	7	-	9	7	9	-	-	9				
		-%	12%	88%	-%	14%	40%	46%	100%	76%	24%	-%	76%	-%	100%	76%	100%	-%	-%	100%				
Outgoing calls	7	-	1	6	-	1	2	4	7	6	2	-	6	-	7	6	7	-	-	7				
	86%	-%	100%	84%	-%	100%	65%	100%	86%	88%	80%	-%	88%	-%	86%	88%	86%	-%	-%	86%				
		-%	14%	86%	-%	16%	30%	54%	100%	78%	22%	-%	78%	-%	100%	78%	100%	-%	-%	100%				
Incoming calls	6	-	1	5	-	1	1	4	6	5	1	-	5	-	6	5	6	-	-	6				
	72%	-%	100%	68%	-%	65%	42%	100%	72%	76%	60%	-%	76%	-%	72%	76%	72%	-%	-%	72%				
		-%	17%	83%	-%	13%	23%	64%	100%	80%	20%	-%	80%	-%	100%	80%	100%	-%	-%	100%				
Internet services	5	-	1	4	-	-	3	3	5	5	*	-	5	-	5	5	5	-	-	5				
	62%	-%	100%	57%	-%	-%	76%	70%	62%	76%	20%	-%	76%	-%	62%	76%	62%	-%	-%	62%				
		-%	19%	81%	-%	-%	48%	52%	100%	92%	8%	-%	92%	-%	100%	92%	100%	-%	-%	100%				
Data services	5	-	1	4	-	-	2	3	5	4	*	-	4	-	5	4	5	-	-	5				
	53%	-%	100%	47%	-%	-%	53%	70%	53%	64%	20%	-%	64%	-%	53%	64%	53%	-%	-%	53%				
		-%	22%	78%	-%	-%	40%	60%	100%	91%	9%	-%	91%	-%	100%	91%	100%	-%	-%	100%				
Calls between different sites	3	-	1	2	-	*	1	1	3	2	1	-	2	-	3	2	3	-	-	3				
	36%	-%	100%	27%	-%	35%	42%	30%	36%	28%	60%	-%	28%	-%	36%	28%	36%	-%	-%	36%				
		-%	34%	66%	-%	14%	47%	39%	100%	59%	41%	-%	59%	-%	100%	59%	100%	-%	-%	100%				
Security/alarm systems	3	-	1	2	-	-	1	2	3	3	*	-	3	-	3	3	3	-	-	3				
	35%	-%	100%	26%	-%	-%	30%	50%	35%	40%	20%	-%	40%	-%	35%	40%	35%	-%	-%	35%				
		-%	34%	66%	-%	-%	34%	66%	100%	86%	14%	-%	86%	-%	100%	86%	100%	-%	-%	100%				
Fax services	3	-	1	2	-	*	1	1	3	2	1	-	2	-	3	2	3	-	-	3				
	31%	-%	100%	21%	-%	35%	30%	30%	31%	28%	40%	-%	28%	-%	31%	28%	31%	-%	-%	31%				
		-%	39%	61%	-%	16%	39%	45%	100%	69%	31%	-%	69%	-%	100%	69%	100%	-%	-%	100%				
Video conferencing	2	-	1	1	-	-	2	*	2	2	*	-	2	-	2	2	2	-	-	2				
	26%	-%	100%	16%	-%	-%	53%	10%	26%	28%	20%	-%	28%	-%	26%	28%	26%	-%	-%	26%				
		-%	46%	54%	-%	-%	81%	19%	100%	81%	19%	-%	81%	-%	100%	81%	100%	-%	-%	100%				
Card payments	1	-	1	*	-	-	1	*	1	1	*	-	1	-	1	1	1	-	-	1				
	17%	-%	100%	5%	-%	-%	30%	10%	17%	16%	20%	-%	16%	-%	17%	16%	17%	-%	-%	17%				
		-%	71%	29%	-%	-%	71%	29%	100%	71%	29%	-%	71%	-%	100%	71%	100%	-%	-%	100%				
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																								



# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 86

## E7AA. What does your organisation still use your ISDN2/2e service for? (MULTI CODE)

Base : Those who use ISDN2/2e as a supplementary service in addition to their main service

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		*a	*b	*c	*d	*e	*f	*g	*h	*i								
Significance Level: 95%																		
Unweighted total	13	-	-	13	-	-	-	-	10	3	-	-	-	-	3	10	2	10
Effective Weighted Sample	12	-	-	12	-	-	-	-	9	3	-	-	-	-	3	9	2	9
Total	9	-	-	9	-	-	-	-	7	1	-	-	-	-	2	6	2	6
		-%	-%	100%	-%	-%	-%	-%	85%	15%	-%	-%	-%	-%	26%	74%	21%	74%
Outgoing calls	7	-	-	7	-	-	-	-	7	1	-	-	-	-	2	5	1	6
	86%	-%	-%	86%	-%	-%	-%	-%	89%	67%	-%	-%	-%	-%	100%	81%	57%	93%
		-%	-%	100%	-%	-%	-%	-%	89%	11%	-%	-%	-%	-%	30%	70%	14%	81%
Incoming calls	6	-	-	6	-	-	-	-	6	*	-	-	-	-	2	4	1	5
	72%	-%	-%	72%	-%	-%	-%	-%	79%	33%	-%	-%	-%	-%	81%	69%	57%	75%
		-%	-%	100%	-%	-%	-%	-%	93%	7%	-%	-%	-%	-%	29%	71%	17%	77%
Internet services	5	-	-	5	-	-	-	-	5	*	-	-	-	-	1	4	2	3
	62%	-%	-%	62%	-%	-%	-%	-%	67%	33%	-%	-%	-%	-%	46%	68%	100%	49%
		-%	-%	100%	-%	-%	-%	-%	92%	8%	-%	-%	-%	-%	19%	81%	34%	59%
Data services	5	-	-	5	-	-	-	-	4	*	-	-	-	-	1	4	1	3
	53%	-%	-%	53%	-%	-%	-%	-%	57%	33%	-%	-%	-%	-%	46%	56%	57%	49%
		-%	-%	100%	-%	-%	-%	-%	91%	9%	-%	-%	-%	-%	22%	78%	22%	69%
Calls between different sites	3	-	-	3	-	-	-	-	2	1	-	-	-	-	1	2	1	2
	36%	-%	-%	36%	-%	-%	-%	-%	25%	100%	-%	-%	-%	-%	65%	25%	57%	25%
		-%	-%	100%	-%	-%	-%	-%	59%	41%	-%	-%	-%	-%	47%	53%	34%	53%
Security/alarm systems	3	-	-	3	-	-	-	-	3	*	-	-	-	-	1	2	1	2
	35%	-%	-%	35%	-%	-%	-%	-%	35%	33%	-%	-%	-%	-%	46%	31%	57%	25%
		-%	-%	100%	-%	-%	-%	-%	86%	14%	-%	-%	-%	-%	34%	66%	34%	52%
Fax services	3	-	-	3	-	-	-	-	2	1	-	-	-	-	1	1	1	1
	31%	-%	-%	31%	-%	-%	-%	-%	25%	67%	-%	-%	-%	-%	65%	19%	57%	19%
		-%	-%	100%	-%	-%	-%	-%	69%	31%	-%	-%	-%	-%	55%	45%	39%	45%
Video conferencing	2	-	-	2	-	-	-	-	2	*	-	-	-	-	1	1	2	-
	26%	-%	-%	26%	-%	-%	-%	-%	25%	33%	-%	-%	-%	-%	46%	19%	100%	-%
		-%	-%	100%	-%	-%	-%	-%	81%	19%	-%	-%	-%	-%	46%	54%	81%	-%
Card payments	1	-	-	1	-	-	-	-	1	*	-	-	-	-	1	*	1	-
	17%	-%	-%	17%	-%	-%	-%	-%	14%	33%	-%	-%	-%	-%	46%	7%	57%	-%
		-%	-%	100%	-%	-%	-%	-%	71%	29%	-%	-%	-%	-%	71%	29%	71%	-%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 86**

**E7AA. What does your organisation still use your ISDN2/2e service for? (MULTI CODE)**

Base : Those who use ISDN2/2e as a supplementary service in addition to their main service

	Total	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
		NEVER			YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
		LAST YEAR	EVER	/DK															
Significance Level: 95%		*a	*b	*c	*d	*e	*f	*g	*h	*i	*j	*k	*l	*m	*n	*o	*p	*q	*r
Unweighted total	13	-	-	-	-	-	-	-	-	-	-	-	7	12	8	2	8	11	2
Effective Weighted Sample	12	-	-	-	-	-	-	-	-	-	-	-	6	11	8	2	7	10	2
Total	9	-	-	-	-	-	-	-	-	-	-	-	5	8	6	2	6	7	2
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	58%	91%	72%	18%	67%	82%	18%
Outgoing calls	7	-	-	-	-	-	-	-	-	-	-	-	5	7	5	2	5	6	2
	86%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	92%	85%	87%	100%	86%	83%	100%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	62%	89%	73%	21%	68%	79%	21%
Incoming calls	6	-	-	-	-	-	-	-	-	-	-	-	3	6	4	2	4	5	1
	72%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	68%	79%	68%	100%	66%	77%	50%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	55%	100%	67%	25%	61%	87%	13%
Internet services	5	-	-	-	-	-	-	-	-	-	-	-	3	5	4	1	4	4	2
	62%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	68%	59%	68%	50%	72%	54%	100%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	63%	85%	78%	15%	78%	71%	29%
Data services	5	-	-	-	-	-	-	-	-	-	-	-	3	4	3	1	3	3	2
	53%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	68%	49%	55%	50%	58%	43%	100%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	74%	83%	74%	17%	74%	66%	34%
Calls between different sites	3	-	-	-	-	-	-	-	-	-	-	-	3	3	2	-	2	3	-
	36%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	53%	39%	36%	-%	38%	43%	-%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	86%	100%	73%	-%	73%	100%	-%
Security/alarm systems	3	-	-	-	-	-	-	-	-	-	-	-	3	3	3	-	3	3	-
	35%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	52%	39%	42%	-%	45%	43%	-%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	86%	100%	86%	-%	86%	100%	-%
Fax services	3	-	-	-	-	-	-	-	-	-	-	-	2	3	2	-	2	3	-
	31%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	45%	34%	36%	-%	38%	38%	-%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	84%	100%	84%	-%	84%	100%	-%
Video conferencing	2	-	-	-	-	-	-	-	-	-	-	-	1	2	2	-	2	2	-
	26%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	21%	28%	29%	-%	31%	32%	-%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	46%	100%	81%	-%	81%	100%	-%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 86

E7AA. What does your organisation still use your ISDN2/2e service for? (MULTI CODE)

Base : Those who use ISDN2/2e as a supplementary service in addition to their main service

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
	NEVER			YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
	LAST YEAR	EVER	/DK															
Significance Level: 95%	*a	*b	*c	*d	*e	*f	*g	*h	*i	*j	*k	*l	*m	*n	*o	*p	*q	*r
Unweighted total	13	-	-	-	-	-	-	-	-	-	-	7	12	8	2	8	11	2
Effective Weighted Sample	12	-	-	-	-	-	-	-	-	-	-	6	11	8	2	7	10	2
Total	9	-	-	-	-	-	-	-	-	-	-	5	8	6	2	6	7	2
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	58%	91%	72%	18%	67%	82%	18%
Card payments	1	-	-	-	-	-	-	-	-	-	-	1	1	1	-	1	1	-
	17%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	21%	18%	17%	-%	18%	20%	-%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	71%	100%	71%	-%	71%	100%	-%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 87**

**E7AB. And what is the main reason you still use your ISDN2/2E service? (SINGLE CODE)**

Base : Those who use ISDN2/2e as a supplementary service in addition to their main service

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											IP SWITCHED		IP NOT SWITCHED		ANY IP
	Total	1-49 *a	50-249 *b	250+ *c	UNDER				ISDN2 *h	ISDN30 *i	ISDN2 ONLY *j	ISDN30 ONLY *k	BOTH ISDN *l	IP NOT ISDN *m	ISDN2 & IP *n	ISDN30 & IP *o	ISDN & IP *p	ISDN *q	ISDN *r					
					£1M *d	£1M-£20M *e	£21M-£100M *f	OVER £100M *g																
Significance Level: 95%																								
Unweighted total	13	-	1	12	-	2	5	6	13	8	5	-	8	-	13	8	13	-	-	13				
Effective Weighted Sample	12	-	1	11	-	2	4	6	12	8	5	-	8	-	12	8	12	-	-	12				
Total	9	-	1	8	-	1	3	4	9	7	2	-	7	-	9	7	9	-	-	9				
		-%	12%	88%	-%	14%	40%	46%	100%	76%	24%	-%	76%	-%	100%	76%	100%	-%	-%	100%				
Outgoing calls	2	-	-	2	-	1	1	*	2	2	1	-	2	-	2	2	2	-	-	2				
	28%	-%	-%	32%	-%	65%	35%	10%	28%	24%	40%	-%	24%	-%	28%	24%	28%	-%	-%	28%				
		-%	-%	100%	-%	33%	50%	17%	100%	65%	35%	-%	65%	-%	100%	65%	100%	-%	-%	100%				
Incoming calls	2	-	-	2	-	-	-	2	2	2	-	-	2	-	2	2	2	-	-	2				
	27%	-%	-%	31%	-%	-%	-%	59%	27%	36%	-%	-%	36%	-%	27%	36%	27%	-%	-%	27%				
		-%	-%	100%	-%	-%	-%	100%	100%	100%	-%	-%	100%	-%	100%	100%	100%	-%	-%	100%				
Internet services	1	-	-	1	-	-	1	*	1	1	*	-	1	-	1	1	1	-	-	1				
	14%	-%	-%	16%	-%	-%	23%	10%	14%	12%	20%	-%	12%	-%	14%	12%	14%	-%	-%	14%				
		-%	-%	100%	-%	-%	65%	35%	100%	65%	35%	-%	65%	-%	100%	65%	100%	-%	-%	100%				
Data services	1	-	1	-	-	-	1	-	1	1	-	-	1	-	1	1	1	-	-	1				
	12%	-%	100%	-%	-%	-%	30%	-%	12%	16%	-%	-%	16%	-%	12%	16%	12%	-%	-%	12%				
		-%	100%	-%	-%	-%	100%	-%	100%	100%	-%	-%	100%	-%	100%	100%	100%	-%	-%	100%				
Security/alarm systems	1	-	-	1	-	-	-	1	1	1	-	-	1	-	1	1	1	-	-	1				
	9%	-%	-%	10%	-%	-%	-%	20%	9%	12%	-%	-%	12%	-%	9%	12%	9%	-%	-%	9%				
		-%	-%	100%	-%	-%	-%	100%	100%	100%	-%	-%	100%	-%	100%	100%	100%	-%	-%	100%				
Calls between different sites	*	-	-	*	-	-	*	-	*	-	*	-	-	-	*	-	*	-	-	*				
	5%	-%	-%	5%	-%	-%	12%	-%	5%	-%	20%	-%	-%	-%	5%	-%	5%	-%	-%	5%				
		-%	-%	100%	-%	-%	100%	-%	100%	-%	100%	-%	-%	-%	100%	-%	100%	-%	-%	100%				
Fax services	*	-	-	*	-	*	-	-	*	-	*	-	-	-	*	-	*	-	-	*				
	5%	-%	-%	5%	-%	35%	-%	-%	5%	-%	20%	-%	-%	-%	5%	-%	5%	-%	-%	5%				
		-%	-%	100%	-%	100%	-%	-%	100%	-%	100%	-%	-%	-%	100%	-%	100%	-%	-%	100%				

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 87

## E7AB. And what is the main reason you still use your ISDN2/2E service? (SINGLE CODE)

Base : Those who use ISDN2/2e as a supplementary service in addition to their main service

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		*a	*b	*c	*d	*e	*f	*g	*h	*i								
Significance Level: 95%																		
Unweighted total	13	-	-	13	-	-	-	-	10	3	-	-	-	-	3	10	2	10
Effective Weighted Sample	12	-	-	12	-	-	-	-	9	3	-	-	-	-	3	9	2	9
Total	9	-	-	9	-	-	-	-	7	1	-	-	-	-	2	6	2	6
		-%	-%	100%	-%	-%	-%	-%	85%	15%	-%	-%	-%	-%	26%	74%	21%	74%
Outgoing calls	2	-	-	2	-	-	-	-	2	-	-	-	-	-	1	2	-	2
	28%	-%	-%	28%	-%	-%	-%	-%	33%	-%	-%	-%	-%	-%	35%	25%	-%	38%
		-%	-%	100%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	33%	67%	-%	100%
Incoming calls	2	-	-	2	-	-	-	-	2	-	-	-	-	-	-	2	-	2
	27%	-%	-%	27%	-%	-%	-%	-%	32%	-%	-%	-%	-%	-%	-%	37%	-%	37%
		-%	-%	100%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	-%	100%	-%	100%
Internet services	1	-	-	1	-	-	-	-	1	*	-	-	-	-	-	1	1	-
	14%	-%	-%	14%	-%	-%	-%	-%	11%	33%	-%	-%	-%	-%	-%	19%	43%	-%
		-%	-%	100%	-%	-%	-%	-%	65%	35%	-%	-%	-%	-%	-%	100%	65%	-%
Data services	1	-	-	1	-	-	-	-	1	-	-	-	-	-	1	-	1	-
	12%	-%	-%	12%	-%	-%	-%	-%	14%	-%	-%	-%	-%	-%	46%	-%	57%	-%
		-%	-%	100%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	100%	-%	100%	-%
Security/alarm systems	1	-	-	1	-	-	-	-	1	-	-	-	-	-	-	1	-	1
	9%	-%	-%	9%	-%	-%	-%	-%	11%	-%	-%	-%	-%	-%	-%	12%	-%	12%
		-%	-%	100%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	-%	100%	-%	100%
Calls between different sites	*	-	-	*	-	-	-	-	-	*	-	-	-	-	-	*	-	*
	5%	-%	-%	5%	-%	-%	-%	-%	-%	33%	-%	-%	-%	-%	-%	7%	-%	7%
		-%	-%	100%	-%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	100%	-%	100%
Fax services	*	-	-	*	-	-	-	-	-	*	-	-	-	-	*	-	-	*
	5%	-%	-%	5%	-%	-%	-%	-%	-%	33%	-%	-%	-%	-%	19%	-%	-%	7%
		-%	-%	100%	-%	-%	-%	-%	-%	100%	-%	-%	-%	-%	100%	-%	-%	100%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 87**

**E7AB. And what is the main reason you still use your ISDN2/2E service? (SINGLE CODE)**

Base : Those who use ISDN2/2e as a supplementary service in addition to their main service

		SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
		NEVER			YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
		LAST YEAR	EVER	/DK															
		Total	*a	*b															
Significance Level: 95%																			
Unweighted total	13	-	-	-	-	-	-	-	-	-	-	-	7	12	8	2	8	11	2
Effective Weighted Sample	12	-	-	-	-	-	-	-	-	-	-	-	6	11	8	2	7	10	2
Total	9	-	-	-	-	-	-	-	-	-	-	-	5	8	6	2	6	7	2
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	58%	91%	72%	18%	67%	82%	18%
Outgoing calls	2	-	-	-	-	-	-	-	-	-	-	-	1	2	2	1	1	2	1
	28%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	16%	21%	26%	50%	21%	23%	50%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	33%	67%	65%	33%	50%	67%	33%
Incoming calls	2	-	-	-	-	-	-	-	-	-	-	-	2	2	2	1	2	2	1
	27%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	31%	30%	26%	50%	27%	22%	50%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	67%	100%	67%	33%	67%	67%	33%
Internet services	1	-	-	-	-	-	-	-	-	-	-	-	-	1	1	-	1	1	-
	14%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	15%	13%	-%	14%	17%	-%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	100%	65%	-%	65%	100%	-%
Data services	1	-	-	-	-	-	-	-	-	-	-	-	1	1	1	-	1	1	-
	12%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	21%	13%	17%	-%	18%	15%	-%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	100%	100%	100%	-%	100%	100%	-%
Security/alarm systems	1	-	-	-	-	-	-	-	-	-	-	-	1	1	1	-	1	1	-
	9%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	16%	10%	13%	-%	14%	11%	-%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	100%	100%	100%	-%	100%	100%	-%
Calls between different sites	*	-	-	-	-	-	-	-	-	-	-	-	*	*	-	-	-	*	-
	5%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	8%	5%	-%	-%	-%	6%	-%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	100%	100%	-%	-%	-%	100%	-%
Fax services	*	-	-	-	-	-	-	-	-	-	-	-	*	*	*	-	*	*	-
	5%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	8%	5%	7%	-%	7%	6%	-%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	100%	100%	100%	-%	100%	100%	-%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 88**

**E7BA. What does your organisation still use your ISDN30 service for? (MULTI CODE)**

Base : Those who use ISDN30 as a supplementary service in addition to their main service

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											IP SWITCHED		IP NOT SWITCHED		ANY IP
	Total	1-49 *a	50-249 *b	250+ *c	UNDER				ISDN2 *h	ISDN30 *i	ISDN2 ONLY *j	ISDN30 ONLY *k	BOTH ISDN *l	IP NOT ISDN *m	ISDN2 & IP *n	ISDN30 & IP *o	ISDN & IP *p	ISDN *q	ISDN *r					
					£1M *d	£1M-£20M *e	£21M-£100M *f	OVER £100M *g																
Significance Level: 95%																								
Unweighted total	12	-	2	10	-	2	7	3	7	12	-	5	7	-	7	12	12	-	-	12				
Effective Weighted Sample	12	-	2	10	-	2	7	3	7	12	-	5	7	-	7	12	12	-	-	12				
Total	10	-	2	8	-	2	6	2	6	10	-	4	6	-	6	10	10	-	-	10				
		-%	21%	79%	-%	16%	60%	24%	58%	100%	-%	42%	58%	-%	58%	100%	100%	-%	-%	100%				
Outgoing calls	9	-	2	7	-	2	5	2	5	9	-	4	5	-	5	9	9	-	-	9				
	92%	-%	100%	90%	-%	100%	87%	100%	86%	92%	-%	100%	86%	-%	86%	92%	92%	-%	-%	92%				
		-%	22%	78%	-%	17%	57%	26%	54%	100%	-%	46%	54%	-%	54%	100%	100%	-%	-%	100%				
Incoming calls	8	-	2	6	-	2	4	2	4	8	-	3	4	-	4	8	8	-	-	8				
	76%	-%	100%	70%	-%	100%	74%	67%	73%	76%	-%	81%	73%	-%	73%	76%	76%	-%	-%	76%				
		-%	27%	73%	-%	21%	58%	21%	55%	100%	-%	45%	55%	-%	55%	100%	100%	-%	-%	100%				
Calls between different sites	5	-	2	3	-	2	3	1	3	5	-	3	3	-	3	5	5	-	-	5				
	52%	-%	100%	40%	-%	100%	47%	33%	45%	52%	-%	62%	45%	-%	45%	52%	52%	-%	-%	52%				
		-%	40%	60%	-%	30%	55%	15%	50%	100%	-%	50%	50%	-%	50%	100%	100%	-%	-%	100%				
Data services	5	-	1	4	-	-	3	2	4	5	-	1	4	-	4	5	5	-	-	5				
	50%	-%	50%	50%	-%	-%	43%	100%	73%	50%	-%	19%	73%	-%	73%	50%	50%	-%	-%	50%				
		-%	21%	79%	-%	-%	52%	48%	84%	100%	-%	16%	84%	-%	84%	100%	100%	-%	-%	100%				
Internet services	4	-	1	3	-	-	3	2	3	4	-	1	3	-	3	4	4	-	-	4				
	42%	-%	50%	40%	-%	-%	43%	67%	59%	42%	-%	19%	59%	-%	59%	42%	42%	-%	-%	42%				
		-%	25%	75%	-%	-%	62%	38%	81%	100%	-%	19%	81%	-%	81%	100%	100%	-%	-%	100%				
Card payments	3	-	1	2	-	-	3	1	3	3	-	1	3	-	3	3	3	-	-	3				
	34%	-%	50%	30%	-%	-%	43%	33%	45%	34%	-%	19%	45%	-%	45%	34%	34%	-%	-%	34%				
		-%	30%	70%	-%	-%	77%	23%	77%	100%	-%	23%	77%	-%	77%	100%	100%	-%	-%	100%				
Fax services	3	-	1	2	-	-	3	1	3	3	-	1	3	-	3	3	3	-	-	3				
	34%	-%	50%	30%	-%	-%	43%	33%	45%	34%	-%	19%	45%	-%	45%	34%	34%	-%	-%	34%				
		-%	30%	70%	-%	-%	77%	23%	77%	100%	-%	23%	77%	-%	77%	100%	100%	-%	-%	100%				
Security/alarm systems	2	-	1	1	-	-	1	1	2	2	-	-	2	-	2	2	2	-	-	2				
	18%	-%	50%	10%	-%	-%	17%	33%	32%	18%	-%	-%	32%	-%	32%	18%	18%	-%	-%	18%				
		-%	57%	43%	-%	-%	57%	43%	100%	100%	-%	-%	100%	-%	100%	100%	100%	-%	-%	100%				
Video conferencing	2	-	1	1	-	-	2	-	2	2	-	-	2	-	2	2	2	-	-	2				
	18%	-%	50%	10%	-%	-%	30%	-%	32%	18%	-%	-%	32%	-%	32%	18%	18%	-%	-%	18%				
		-%	57%	43%	-%	-%	100%	-%	100%	100%	-%	-%	100%	-%	100%	100%	100%	-%	-%	100%				

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 88**

## **E7BA. What does your organisation still use your ISDN30 service for? (MULTI CODE)**

Base : Those who use ISDN30 as a supplementary service in addition to their main service

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
Significance Level: 95%		*a	*b	*c	*d	*e	*f	*g	*h	*i	*j	*k	*l	*m	*n	*o	*p	*q
Unweighted total	12	-	-	12	-	-	-	-	9	3	-	-	-	-	3	9	4	7
Effective Weighted Sample	12	-	-	12	-	-	-	-	9	3	-	-	-	-	3	9	4	7
Total	10	-	-	10	-	-	-	-	8	2	-	-	-	-	3	7	3	6
		-%	-%	100%	-%	-%	-%	-%	76%	24%	-%	-%	-%	-%	26%	74%	34%	56%
Outgoing calls	9	-	-	9	-	-	-	-	7	2	-	-	-	-	3	7	3	5
	92%	-%	-%	92%	-%	-%	-%	-%	90%	100%	-%	-%	-%	-%	100%	89%	100%	86%
		-%	-%	100%	-%	-%	-%	-%	74%	26%	-%	-%	-%	-%	28%	72%	37%	52%
Incoming calls	8	-	-	8	-	-	-	-	6	2	-	-	-	-	2	6	3	4
	76%	-%	-%	76%	-%	-%	-%	-%	79%	67%	-%	-%	-%	-%	70%	79%	77%	71%
		-%	-%	100%	-%	-%	-%	-%	79%	21%	-%	-%	-%	-%	24%	76%	34%	52%
Calls between different sites	5	-	-	5	-	-	-	-	4	2	-	-	-	-	2	3	3	2
	52%	-%	-%	52%	-%	-%	-%	-%	48%	67%	-%	-%	-%	-%	70%	46%	77%	29%
		-%	-%	100%	-%	-%	-%	-%	70%	30%	-%	-%	-%	-%	35%	65%	50%	30%
Data services	5	-	-	5	-	-	-	-	5	-	-	-	-	-	2	3	1	4
	50%	-%	-%	50%	-%	-%	-%	-%	66%	-%	-%	-%	-%	-%	70%	43%	30%	71%
		-%	-%	100%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	37%	63%	21%	79%
Internet services	4	-	-	4	-	-	-	-	3	1	-	-	-	-	2	2	2	2
	42%	-%	-%	42%	-%	-%	-%	-%	45%	33%	-%	-%	-%	-%	70%	32%	54%	43%
		-%	-%	100%	-%	-%	-%	-%	81%	19%	-%	-%	-%	-%	43%	57%	43%	57%
Card payments	3	-	-	3	-	-	-	-	3	-	-	-	-	-	2	2	1	2
	34%	-%	-%	34%	-%	-%	-%	-%	45%	-%	-%	-%	-%	-%	70%	21%	30%	43%
		-%	-%	100%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	54%	46%	30%	70%
Fax services	3	-	-	3	-	-	-	-	3	-	-	-	-	-	2	2	1	2
	34%	-%	-%	34%	-%	-%	-%	-%	45%	-%	-%	-%	-%	-%	70%	21%	30%	43%
		-%	-%	100%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	54%	46%	30%	70%
Security/alarm systems	2	-	-	2	-	-	-	-	2	-	-	-	-	-	1	1	1	1
	18%	-%	-%	18%	-%	-%	-%	-%	24%	-%	-%	-%	-%	-%	40%	11%	30%	14%
		-%	-%	100%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	57%	43%	57%	43%
Video conferencing	2	-	-	2	-	-	-	-	1	1	-	-	-	-	1	1	2	-
	18%	-%	-%	18%	-%	-%	-%	-%	14%	33%	-%	-%	-%	-%	40%	11%	54%	-%
		-%	-%	100%	-%	-%	-%	-%	57%	43%	-%	-%	-%	-%	57%	43%	100%	-%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q



# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 88**

**E7BA. What does your organisation still use your ISDN30 service for? (MULTI CODE)**

Base : Those who use ISDN30 as a supplementary service in addition to their main service

	Total	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
		NEVER			YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
		LAST YEAR	EVER	/DK															
Significance Level: 95%		*a	*b	*c	*d	*e	*f	*g	*h	*i	*j	*k	*l	*m	*n	*o	*p	*q	*r
Unweighted total	12	-	-	-	-	-	-	-	-	-	-	-	8	9	9	5	7	9	3
Effective Weighted Sample	12	-	-	-	-	-	-	-	-	-	-	-	8	9	9	5	7	9	3
Total	10	-	-	-	-	-	-	-	-	-	-	-	7	8	7	4	6	8	2
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	66%	76%	74%	40%	60%	76%	24%
Outgoing calls	9	-	-	-	-	-	-	-	-	-	-	-	6	8	7	4	5	8	2
	92%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	88%	100%	89%	100%	87%	100%	67%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	63%	83%	72%	43%	57%	83%	17%
Incoming calls	8	-	-	-	-	-	-	-	-	-	-	-	5	5	5	2	5	6	2
	76%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	76%	69%	68%	60%	87%	79%	67%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	66%	69%	66%	31%	69%	79%	21%
Calls between different sites	5	-	-	-	-	-	-	-	-	-	-	-	3	4	4	2	4	4	1
	52%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	40%	58%	57%	40%	61%	58%	33%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	50%	85%	80%	30%	70%	85%	15%
Data services	5	-	-	-	-	-	-	-	-	-	-	-	4	4	4	1	4	3	2
	50%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	64%	55%	57%	20%	70%	45%	67%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	84%	84%	84%	16%	84%	68%	32%
Internet services	4	-	-	-	-	-	-	-	-	-	-	-	4	4	3	1	3	4	-
	42%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	64%	55%	46%	20%	57%	55%	-%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	100%	100%	81%	19%	81%	100%	-%
Card payments	3	-	-	-	-	-	-	-	-	-	-	-	3	3	3	-	3	3	1
	34%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	52%	34%	46%	-%	57%	34%	33%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	100%	77%	100%	-%	100%	77%	23%
Fax services	3	-	-	-	-	-	-	-	-	-	-	-	3	3	3	1	3	2	2
	34%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	40%	34%	46%	20%	43%	24%	67%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	77%	77%	100%	23%	77%	54%	46%
Security/alarm systems	2	-	-	-	-	-	-	-	-	-	-	-	2	2	2	-	2	2	-
	18%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	28%	24%	25%	-%	30%	24%	-%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	100%	100%	100%	-%	100%	100%	-%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 88

E7BA. What does your organisation still use your ISDN30 service for? (MULTI CODE)

Base : Those who use ISDN30 as a supplementary service in addition to their main service

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
	NEVER			YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
	LAST YEAR	EVER	/DK															
Significance Level: 95%	*a	*b	*c	*d	*e	*f	*g	*h	*i	*j	*k	*l	*m	*n	*o	*p	*q	*r
Unweighted total	12	-	-	-	-	-	-	-	-	-	-	8	9	9	5	7	9	3
Effective Weighted Sample	12	-	-	-	-	-	-	-	-	-	-	8	9	9	5	7	9	3
Total	10	-	-	-	-	-	-	-	-	-	-	7	8	7	4	6	8	2
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	66%	76%	74%	40%	60%	76%	24%
Video conferencing	2	-	-	-	-	-	-	-	-	-	-	2	2	2	1	1	2	-
	18%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	28%	24%	25%	20%	17%	24%	-%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	100%	100%	100%	43%	57%	100%	-%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 89**

**E7BB. And what is the main reason you still use your ISDN30 service? (SINGLE CODE)**

Base : Those who use ISDN30 as a supplementary service in addition to their main service

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION												
	Total	1-49 *a	50-249 *b	250+ *c	UNDER				ISDN2 *h	ISDN30 *i	ISDN2 ONLY *j	ISDN30 ONLY *k	BOTH ISDN *l	IP NOT ISDN *m	ISDN2 & IP *n	ISDN30 & IP *o	ISDN & IP *p	IP SWITCHED		IP NOT SWITCHED	ANY IP *s
					£1M *d	£1M- £20M *e	£21M-£100M *f	OVER £100M *g										ISDN *q	ISDN *r		
Significance Level: 95%																					
Unweighted total	12	-	2	10	-	2	7	3	7	12	-	5	7	-	7	12	12	-	-	12	
Effective Weighted Sample	12	-	2	10	-	2	7	3	7	12	-	5	7	-	7	12	12	-	-	12	
Total	10	-	2	8	-	2	6	2	6	10	-	4	6	-	6	10	10	-	-	10	
		-%	21%	79%	-%	16%	60%	24%	58%	100%	-%	42%	58%	-%	58%	100%	100%	-%	-%	100%	
Internet services	3	-	1	2	-	-	3	1	3	3	-	1	3	-	3	3	3	-	-	3	
	34%	-%	50%	30%	-%	-%	43%	33%	45%	34%	-%	19%	45%	-%	45%	34%	34%	-%	-%	34%	
		-%	30%	70%	-%	-%	77%	23%	77%	100%	-%	23%	77%	-%	77%	100%	100%	-%	-%	100%	
Incoming calls	3	-	1	2	-	1	2	1	1	3	-	3	1	-	1	3	3	-	-	3	
	34%	-%	50%	30%	-%	50%	30%	33%	14%	34%	-%	62%	14%	-%	14%	34%	34%	-%	-%	34%	
		-%	30%	70%	-%	23%	54%	23%	23%	100%	-%	77%	23%	-%	23%	100%	100%	-%	-%	100%	
Calls between different sites	2	-	-	2	-	1	1	-	1	2	-	1	1	-	1	2	2	-	-	2	
	16%	-%	-%	20%	-%	50%	13%	-%	14%	16%	-%	19%	14%	-%	14%	16%	16%	-%	-%	16%	
		-%	-%	100%	-%	50%	50%	-%	50%	100%	-%	50%	50%	-%	50%	100%	100%	-%	-%	100%	
Outgoing calls	1	-	-	1	-	-	-	1	1	1	-	-	1	-	1	1	1	-	-	1	
	8%	-%	-%	10%	-%	-%	-%	33%	14%	8%	-%	-%	14%	-%	14%	8%	8%	-%	-%	8%	
		-%	-%	100%	-%	-%	-%	100%	100%	100%	-%	-%	100%	-%	100%	100%	100%	-%	-%	100%	
Fax services	1	-	-	1	-	-	1	-	1	1	-	-	1	-	1	1	1	-	-	1	
	8%	-%	-%	10%	-%	-%	13%	-%	14%	8%	-%	-%	14%	-%	14%	8%	8%	-%	-%	8%	
		-%	-%	100%	-%	-%	100%	-%	100%	100%	-%	-%	100%	-%	100%	100%	100%	-%	-%	100%	

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 89

E7BB. And what is the main reason you still use your ISDN30 service? (SINGLE CODE)

Base : Those who use ISDN30 as a supplementary service in addition to their main service

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
Significance Level: 95%		*a	*b	*c	*d	*e	*f	*g	*h	*i	*j	*k	*l	*m	*n	*o	*p	*q
Unweighted total	12	-	-	12	-	-	-	-	9	3	-	-	-	-	3	9	4	7
Effective Weighted Sample	12	-	-	12	-	-	-	-	9	3	-	-	-	-	3	9	4	7
Total	10	-	-	10	-	-	-	-	8	2	-	-	-	-	3	7	3	6
		-%	-%	100%	-%	-%	-%	-%	76%	24%	-%	-%	-%	-%	26%	74%	34%	56%
Internet services	3	-	-	3	-	-	-	-	3	1	-	-	-	-	2	2	2	2
	34%	-%	-%	34%	-%	-%	-%	-%	34%	33%	-%	-%	-%	-%	70%	21%	54%	29%
		-%	-%	100%	-%	-%	-%	-%	77%	23%	-%	-%	-%	-%	54%	46%	54%	46%
Incoming calls	3	-	-	3	-	-	-	-	3	-	-	-	-	-	1	3	1	2
	34%	-%	-%	34%	-%	-%	-%	-%	45%	-%	-%	-%	-%	-%	30%	36%	23%	29%
		-%	-%	100%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	23%	77%	23%	46%
Calls between different sites	2	-	-	2	-	-	-	-	-	2	-	-	-	-	-	2	1	1
	16%	-%	-%	16%	-%	-%	-%	-%	-%	67%	-%	-%	-%	-%	-%	21%	23%	14%
		-%	-%	100%	-%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	100%	50%	50%
Outgoing calls	1	-	-	1	-	-	-	-	1	-	-	-	-	-	-	1	-	1
	8%	-%	-%	8%	-%	-%	-%	-%	10%	-%	-%	-%	-%	-%	-%	11%	-%	14%
		-%	-%	100%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	-%	100%	-%	100%
Fax services	1	-	-	1	-	-	-	-	1	-	-	-	-	-	-	1	-	1
	8%	-%	-%	8%	-%	-%	-%	-%	10%	-%	-%	-%	-%	-%	-%	11%	-%	14%
		-%	-%	100%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	-%	100%	-%	100%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 89

E7BB. And what is the main reason you still use your ISDN30 service? (SINGLE CODE)

Base : Those who use ISDN30 as a supplementary service in addition to their main service

	Total	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
		LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%		*a	*b	*c	*d	*e	*f	*g	*h	*i	*j	*k	*l	*m	*n	*o	*p	*q	*r
Unweighted total	12	-	-	-	-	-	-	-	-	-	-	-	8	9	9	5	7	9	3
Effective Weighted Sample	12	-	-	-	-	-	-	-	-	-	-	-	8	9	9	5	7	9	3
Total	10	-	-	-	-	-	-	-	-	-	-	-	7	8	7	4	6	8	2
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	66%	76%	74%	40%	60%	76%	24%
Internet services	3	-	-	-	-	-	-	-	-	-	-	-	3	3	3	1	3	3	-
	34%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	52%	45%	46%	20%	43%	45%	-%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	100%	100%	100%	23%	77%	100%	-%
Incoming calls	3	-	-	-	-	-	-	-	-	-	-	-	2	2	1	2	2	3	-
	34%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	24%	24%	11%	40%	30%	45%	-%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	46%	54%	23%	46%	54%	100%	-%
Calls between different sites	2	-	-	-	-	-	-	-	-	-	-	-	1	2	2	1	1	1	1
	16%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	12%	21%	21%	20%	13%	10%	33%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	50%	100%	100%	50%	50%	50%	50%
Outgoing calls	1	-	-	-	-	-	-	-	-	-	-	-	-	1	1	1	-	-	1
	8%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	10%	11%	20%	-%	-%	33%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	100%	100%	100%	-%	-%	100%
Fax services	1	-	-	-	-	-	-	-	-	-	-	-	1	-	1	-	1	-	1
	8%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	12%	-%	11%	-%	13%	-%	33%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	100%	-%	100%	-%	100%	-%	100%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 90

E6C. In which of these ways do you use IP services alongside ISDN2/2e or ISDN30 services? (MULTI CODE)

Base : Those who use IP-based alternatives and mostly use an ISDN service

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											IP SWITCHED		IP NOT SWITCHED		ANY IP
	Total	1-49 *a	50-249 *b	250+ c	UNDER				ISDN2 h	ISDN30 i	ISDN2 ONLY *j	ISDN30 ONLY *k	BOTH ISDN l	IP NOT ISDN *m	ISDN2 & IP n	ISDN30 & IP o	ISDN & IP p	ISDN q	ISDN *r					
					£1M *d	£1M-£20M *e	£21M-£100M *f	OVER £100M g																
Significance Level: 95%																								
Unweighted total	85	10	25	50	7	20	26	31	67	61	24	18	43	-	67	61	85	67	16	85				
Effective Weighted Sample	73	8	25	47	5	18	24	28	55	60	15	18	42	-	55	60	73	58	14	73				
Total	75	14	28	34	9	19	22	24	57	54	21	18	37	-	57	54	75	61	13	75				
		18%	37%	45%	12%	26%	30%	32%	77%	73%	27%	23%	49%	-%	77%	73%	100%	81%	17%	100%				
A supplementary service used in addition to your main service	47	8	15	23	5	7	17	17	35	37	9	12	25	-	35	37	47	38	9	47				
	62%	59%	55%	69%	56%	38%	75%	73%	61%	69%	45%	68%	69%	-%	61%	69%	62%	63%	66%	62%				
		17%	32%	50%	11%	16%	36%	37%	75%	80%	20%	25%	55%	-%	75%	80%	100%	82%	18%	100%				
A back-up system in case your main system fails	48	9	18	21	7	13	14	14	38	32	16	10	22	-	38	32	48	39	8	48				
	64%	67%	65%	62%	71%	68%	65%	57%	67%	59%	78%	56%	60%	-%	67%	59%	64%	65%	63%	64%				
		19%	37%	44%	14%	27%	30%	28%	80%	67%	33%	20%	46%	-%	80%	67%	100%	82%	17%	100%				
Other	1	1	-	-	1	-	-	-	-	1	-	1	-	-	-	1	1	1	-	1				
	1%	8%	-%	-%	12%	-%	-%	-%	-%	2%	-%	6%	-%	-%	-%	2%	1%	2%	-%	1%				
		100%	-%	-%	100%	-%	-%	-%	-%	100%	-%	100%	-%	-%	-%	100%	100%	100%	-%	100%				
Not at all	1	-	1	-	-	1	-	-	1	1	-	-	1	-	1	1	1	1	-	1				
	1%	-%	4%	-%	-%	5%	-%	-%	2%	2%	-%	-%	3%	-%	2%	2%	1%	2%	-%	1%				
		-%	100%	-%	-%	100%	-%	-%	100%	100%	-%	-%	100%	-%	100%	100%	100%	100%	-%	100%				
Don't know	2	-	1	1	-	1	1	-	2	2	-	-	2	-	2	2	2	1	-	2				
	2%	-%	4%	2%	-%	5%	4%	-%	3%	3%	-%	-%	5%	-%	3%	3%	2%	1%	-%	2%				
		-%	57%	43%	-%	57%	43%	-%	100%	100%	-%	-%	100%	-%	100%	100%	100%	43%	-%	100%				

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 90

E6C. In which of these ways do you use IP services alongside ISDN2/2e or ISDN30 services? (MULTI CODE)

Base : Those who use IP-based alternatives and mostly use an ISDN service

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN30			ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		ISDN2	ISDN30	IP														
Significance Level: 95%		a	b	*c	d	*e	f	*g	h	i	j	*k	l	*m	n	o	*p	q
Unweighted total	85	52	33	-	45	22	39	22	52	33	72	13	71	1	36	49	22	63
Effective Weighted Sample	73	41	32	-	40	16	38	22	44	29	61	12	60	1	30	44	17	57
Total	75	44	31	-	37	21	35	20	47	28	65	10	64	1	36	39	21	54
		59%	41%	-%	49%	27%	47%	26%	63%	37%	87%	13%	85%	1%	48%	52%	28%	72%
A supplementary service used in addition to your main service	47	27	20	-	25	10	27	10	35	12	43	4	42	1	20	27	10	37
	62%	61%	65%	-%	68%	47%	78%	51%	74%	42%	66%	39%	65%	100%	55%	69%	46%	69%
		57%	43%	-%	54%	21%	59%	21%	75%	25%	91%	9%	90%	2%	42%	58%	21%	79%
A back-up system in case your main system fails	48	30	18	-	24	15	18	14	29	19	43	5	42	1	23	25	13	35
	64%	67%	60%	-%	64%	72%	53%	69%	62%	69%	66%	50%	66%	100%	65%	64%	62%	65%
		62%	38%	-%	49%	31%	38%	28%	61%	39%	89%	11%	88%	2%	48%	52%	27%	73%
Other	1	-	1	-	-	-	1	-	1	-	1	-	1	-	1	-	1	-
	1%	-%	4%	-%	-%	-%	3%	-%	2%	-%	2%	-%	2%	-%	3%	-%	5%	-%
		-%	100%	-%	-%	-%	100%	-%	100%	-%	100%	-%	100%	-%	100%	-%	100%	-%
Not at all	1	1	-	-	1	-	-	1	-	1	1	-	1	-	1	-	1	-
	1%	2%	-%	-%	3%	-%	-%	5%	-%	4%	2%	-%	2%	-%	3%	-%	5%	-%
		100%	-%	-%	100%	-%	-%	100%	-%	100%	100%	-%	100%	-%	100%	-%	100%	-%
Don't know	2	1	1	-	1	1	1	1	1	1	-	2	-	-	1	1	1	1
	2%	2%	3%	-%	2%	5%	2%	5%	2%	3%	-%	18%	-%	-%	2%	3%	5%	1%
		43%	57%	-%	43%	57%	43%	57%	57%	43%	-%	100%	-%	-%	43%	57%	57%	43%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 90**

**E6C. In which of these ways do you use IP services alongside ISDN2/2e or ISDN30 services? (MULTI CODE)**

Base : Those who use IP-based alternatives and mostly use an ISDN service

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
	NEVER			YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
	LAST YEAR	EVER	/DK															
Significance Level: 95%	*a	b	*c	d	*e	*f	*g	h	*i	*j	*k	l	m	n	o	p	q	*r
Unweighted total	85	19	48	18	63	15	-	63	20	-	-	44	59	45	34	50	62	23
Effective Weighted Sample	73	18	40	15	53	14	-	53	18	-	-	36	55	40	28	45	53	20
Total	75	15	45	14	55	14	-	57	17	-	-	40	50	38	33	42	55	20
	20%	60%	19%	73%	19%	-	-	76%	22%	-	-	53%	66%	51%	43%	56%	74%	26%
A supplementary service used in addition to your main service	47	13	25	9	35	8	-	37	9	-	-	29	36	25	15	32	39	8
	62%	88%	54%	60%	64%	55%	-	65%	51%	-	-	73%	73%	65%	45%	76%	70%	41%
		29%	53%	18%	76%	17%	-	80%	18%	-	-	62%	77%	53%	31%	69%	83%	17%
A back-up system in case your main system fails	48	10	29	9	36	9	-	36	12	-	-	23	32	27	23	25	33	15
	64%	66%	65%	60%	66%	65%	-	63%	70%	-	-	57%	64%	71%	70%	59%	61%	74%
		21%	61%	18%	75%	20%	-	75%	24%	-	-	47%	66%	56%	47%	52%	69%	31%
Other	1	-	1	-	1	-	-	1	-	-	-	-	1	-	1	-	1	-
	1%	-	2%	-	2%	-	-	2%	-	-	-	-	2%	-	3%	-	2%	-
		-	100%	-	100%	-	-	100%	-	-	-	-	100%	-	100%	-	100%	-
Not at all	1	-	1	-	-	1	-	1	-	-	-	-	-	-	1	-	-	1
	1%	-	2%	-	-	7%	-	2%	-	-	-	-	-	-	3%	-	-	5%
		-	100%	-	-	100%	-	100%	-	-	-	-	-	-	100%	-	-	100%
Don't know	2	-	1	1	1	-	-	-	2	-	-	-	-	-	-	2	1	1
	2%	-	2%	7%	1%	-	-	-	11%	-	-	-	-	-	-	4%	1%	5%
		-	43%	57%	43%	-	-	-	100%	-	-	-	-	-	-	100%	43%	57%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r



# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 91**

## **E7C. What does your organisation use your IP services for? (MULTI CODE)**

Base : Those who use IP-based alternatives and mostly use an ISDN service

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											
	Total	UNDER			ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	IP SWITCHED	IP NOT SWITCHED	ANY					
		1-49	50-249	250+												£1M-£20M	£21M-£100M	OVER £100M		
Significance Level: 95%		*a	*b	c	*d	*e	*f	g	h	i	*j	*k	l	*m	n	o	p	q	*r	s
Unweighted total	85	10	25	50	7	20	26	31	67	61	24	18	43	-	67	61	85	67	16	85
Effective Weighted Sample	73	8	25	47	5	18	24	28	55	60	15	18	42	-	55	60	73	58	14	73
Total	75	14	28	34	9	19	22	24	57	54	21	18	37	-	57	54	75	61	13	75
		18%	37%	45%	12%	26%	30%	32%	77%	73%	27%	23%	49%	-%	77%	73%	100%	81%	17%	100%
Outgoing calls	40	7	12	22	4	10	9	16	34	28	13	6	22	-	34	28	40	30	10	40
	54%	52%	43%	64%	48%	52%	43%	67%	59%	51%	61%	35%	58%	-%	59%	51%	54%	49%	78%	54%
		17%	29%	53%	11%	25%	24%	39%	85%	69%	31%	15%	53%	-%	85%	69%	100%	74%	25%	100%
Incoming calls	39	7	9	23	5	5	10	18	32	26	12	7	19	-	32	26	39	29	9	39
	51%	51%	33%	67%	48%	28%	47%	77%	56%	48%	61%	38%	53%	-%	56%	48%	51%	48%	69%	51%
		18%	23%	59%	12%	14%	27%	47%	83%	68%	32%	17%	50%	-%	83%	68%	100%	76%	23%	100%
Internet services	37	7	13	17	4	4	16	14	28	29	9	9	20	-	28	29	37	30	7	37
	49%	51%	47%	51%	46%	20%	70%	57%	49%	53%	41%	51%	53%	-%	49%	53%	49%	49%	52%	49%
		19%	35%	46%	12%	10%	42%	36%	76%	77%	23%	24%	53%	-%	76%	77%	100%	81%	18%	100%
Calls between different sites	36	6	12	19	5	9	10	12	31	25	11	5	21	-	31	25	36	29	6	36
	48%	41%	42%	55%	52%	48%	45%	50%	55%	47%	51%	27%	56%	-%	55%	47%	48%	47%	50%	48%
		15%	32%	52%	14%	26%	28%	33%	87%	71%	29%	13%	58%	-%	87%	71%	100%	79%	18%	100%
Fax services	35	7	12	16	5	8	10	12	29	24	11	6	18	-	29	24	35	27	7	35
	47%	51%	44%	47%	48%	44%	44%	51%	50%	43%	55%	35%	48%	-%	50%	43%	47%	45%	57%	47%
		20%	35%	46%	13%	24%	28%	35%	82%	68%	32%	18%	50%	-%	82%	68%	100%	78%	21%	100%
Security/alarm systems	32	4	13	15	4	7	12	10	26	25	7	6	19	-	26	25	32	27	5	32
	43%	26%	49%	45%	38%	37%	53%	40%	45%	46%	35%	34%	51%	-%	45%	46%	43%	44%	40%	43%
		11%	42%	47%	11%	22%	37%	30%	81%	77%	23%	19%	59%	-%	81%	77%	100%	84%	16%	100%
Data services	31	3	11	17	2	4	13	12	23	25	6	8	18	-	23	25	31	23	7	31
	42%	25%	39%	51%	26%	20%	59%	50%	41%	47%	28%	44%	48%	-%	41%	47%	42%	38%	53%	42%
		11%	34%	55%	8%	12%	42%	38%	75%	82%	18%	25%	57%	-%	75%	82%	100%	73%	22%	100%
Video conferencing	17	1	7	8	-	1	10	5	11	15	2	5	9	-	11	15	17	14	2	17
	22%	7%	26%	25%	-%	5%	47%	22%	20%	27%	10%	29%	25%	-%	20%	27%	22%	23%	19%	22%
		6%	43%	51%	-%	6%	63%	31%	69%	87%	13%	31%	57%	-%	69%	87%	100%	83%	15%	100%
Card payments	16	1	5	10	2	3	4	7	15	11	5	1	10	-	15	11	16	12	4	16
	21%	10%	18%	28%	23%	14%	16%	30%	26%	20%	24%	4%	27%	-%	26%	20%	21%	19%	32%	21%
		9%	31%	60%	14%	18%	23%	45%	95%	68%	32%	5%	63%	-%	95%	68%	100%	73%	27%	100%
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																				

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 91

## E7C. What does your organisation use your IP services for? (MULTI CODE)

Base : Those who use IP-based alternatives and mostly use an ISDN service

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	b	*c	d	*e	f	*g	h	i	j	*k	l	*m	n	o	*p	q
Significance Level: 95%																		
Unweighted total	85	52	33	-	45	22	39	22	52	33	72	13	71	1	36	49	22	63
Effective Weighted Sample	73	41	32	-	40	16	38	22	44	29	61	12	60	1	30	44	17	57
Total	75	44	31	-	37	21	35	20	47	28	65	10	64	1	36	39	21	54
		59%	41%	-%	49%	27%	47%	26%	63%	37%	87%	13%	85%	1%	48%	52%	28%	72%
Outgoing calls	40	31	9	-	26	8	18	9	29	12	36	5	35	1	15	25	9	32
	54%	70%	30%	-%	70%	40%	52%	49%	61%	42%	55%	46%	54%	100%	42%	65%	42%	58%
		b			i													
		77%	23%	-%	64%	21%	45%	24%	71%	29%	89%	11%	87%	2%	37%	63%	22%	78%
Incoming calls	39	28	11	-	24	8	19	8	28	11	36	2	36	1	18	21	9	30
	51%	63%	35%	-%	66%	38%	53%	39%	59%	38%	56%	22%	55%	100%	49%	53%	42%	55%
		b			i													
		72%	28%	-%	63%	20%	48%	20%	73%	27%	94%	6%	92%	2%	46%	54%	23%	77%
Internet services	37	21	16	-	21	8	18	10	25	12	33	4	33	1	16	21	7	31
	49%	47%	53%	-%	56%	37%	52%	53%	53%	44%	51%	38%	51%	100%	45%	53%	31%	57%
		56%	44%	-%	55%	20%	49%	28%	67%	33%	90%	10%	88%	2%	44%	56%	18%	82%
Calls between different sites	36	21	15	-	21	11	17	8	25	11	32	4	32	-	18	18	12	24
	48%	49%	47%	-%	56%	52%	50%	41%	52%	40%	50%	36%	50%	-%	50%	46%	58%	44%
		60%	40%	-%	58%	29%	49%	22%	69%	31%	90%	10%	90%	-%	49%	51%	34%	66%
Fax services	35	21	14	-	20	9	19	5	25	10	33	2	33	-	19	16	11	24
	47%	47%	45%	-%	53%	44%	54%	25%	52%	37%	50%	22%	51%	-%	52%	41%	51%	45%
		60%	40%	-%	56%	26%	54%	14%	71%	29%	94%	6%	94%	-%	53%	47%	30%	70%
Security/alarm systems	32	17	15	-	19	8	18	7	23	9	29	3	29	-	15	17	8	24
	43%	39%	49%	-%	50%	37%	51%	35%	49%	32%	45%	30%	45%	-%	41%	44%	39%	44%
		53%	47%	-%	58%	24%	56%	21%	72%	28%	91%	9%	91%	-%	46%	54%	25%	75%
Data services	31	15	16	-	15	8	18	8	21	10	28	3	28	-	12	19	5	26
	42%	34%	52%	-%	42%	39%	51%	40%	45%	36%	43%	30%	44%	-%	35%	48%	26%	48%
		49%	51%	-%	49%	26%	57%	25%	68%	32%	90%	10%	90%	-%	40%	60%	17%	83%
Video conferencing	17	5	11	-	7	4	12	3	14	2	16	*	16	-	7	10	1	15
	22%	12%	37%	-%	19%	22%	34%	13%	30%	8%	25%	4%	25%	-%	19%	25%	6%	28%
		a			i				i									
		32%	68%	-%	43%	27%	72%	15%	87%	13%	97%	3%	97%	-%	42%	58%	7%	93%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 91

## E7C. What does your organisation use your IP services for? (MULTI CODE)

Base : Those who use IP-based alternatives and mostly use an ISDN service

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		a	b	*c	d	*e	f	*g	h	i	j	*k	l	*m	n	o	*p	q
Significance Level: 95%																		
Unweighted total	85	52	33	-	45	22	39	22	52	33	72	13	71	1	36	49	22	63
Effective Weighted Sample	73	41	32	-	40	16	38	22	44	29	61	12	60	1	30	44	17	57
Total	75	44	31	-	37	21	35	20	47	28	65	10	64	1	36	39	21	54
		59%	41%	-%	49%	27%	47%	26%	63%	37%	87%	13%	85%	1%	48%	52%	28%	72%
Card payments	16	11	5	-	9	6	8	3	12	3	15	1	15	-	7	8	3	13
	21%	24%	17%	-%	24%	30%	22%	16%	26%	12%	22%	12%	23%	-%	21%	21%	14%	24%
		67%	33%	-%	56%	39%	48%	20%	79%	21%	92%	8%	92%	-%	47%	53%	19%	81%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 91**

## **E7C. What does your organisation use your IP services for? (MULTI CODE)**

Base : Those who use IP-based alternatives and mostly use an ISDN service

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
	Total	NEVER			YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
		LAST YEAR	EVER	/DK															
Significance Level: 95%		*a	b	*c	d	*e	*f	*g	h	*i	*j	*k	l	m	n	o	p	q	*r
Unweighted total	85	19	48	18	63	15	-	-	63	20	-	-	44	59	45	34	50	62	23
Effective Weighted Sample	73	18	40	15	53	14	-	-	53	18	-	-	36	55	40	28	45	53	20
Total	75	15	45	14	55	14	-	-	57	17	-	-	40	50	38	33	42	55	20
		20%	60%	19%	73%	19%	-%	-%	76%	22%	-%	-%	53%	66%	51%	43%	56%	74%	26%
Outgoing calls	40	11	18	11	29	9	-	-	28	12	-	-	23	26	25	18	22	27	13
	54%	75%	40%	73%	53%	59%	-%	-%	49%	71%	-%	-%	58%	53%	67%	55%	52%	50%	65%
		28%	45%	26%	72%	21%	-%	-%	70%	29%	-%	-%	57%	65%	63%	44%	55%	68%	32%
Incoming calls	39	12	17	9	27	8	-	-	28	9	-	-	24	28	23	13	25	31	8
	51%	78%	38%	65%	50%	58%	-%	-%	49%	57%	-%	-%	61%	56%	61%	41%	59%	56%	40%
		31%	45%	24%	70%	22%	-%	-%	73%	24%	-%	-%	62%	72%	60%	35%	64%	80%	20%
Internet services	37	8	21	7	28	6	-	-	29	7	-	-	17	30	22	12	25	28	9
	49%	55%	48%	50%	51%	43%	-%	-%	51%	40%	-%	-%	43%	60%	58%	36%	59%	51%	45%
		23%	58%	19%	75%	17%	-%	-%	79%	18%	-%	-%	46%	81%	60%	32%	67%	76%	24%
Calls between different sites	36	10	19	7	27	5	-	-	30	5	-	-	22	23	19	16	20	27	9
	48%	64%	41%	52%	48%	35%	-%	-%	52%	32%	-%	-%	54%	47%	49%	48%	48%	49%	46%
		27%	52%	21%	74%	14%	-%	-%	83%	15%	-%	-%	60%	65%	52%	43%	57%	75%	25%
Fax services	35	7	20	8	25	7	-	-	29	5	-	-	21	21	20	15	19	27	8
	47%	44%	45%	54%	46%	50%	-%	-%	51%	31%	-%	-%	52%	43%	52%	46%	46%	49%	41%
		19%	58%	22%	72%	21%	-%	-%	84%	15%	-%	-%	59%	61%	56%	43%	56%	77%	23%
Security/alarm systems	32	7	19	5	23	6	-	-	25	8	-	-	16	25	21	14	18	24	8
	43%	49%	43%	36%	43%	43%	-%	-%	43%	46%	-%	-%	41%	50%	56%	43%	43%	44%	41%
		23%	61%	16%	73%	19%	-%	-%	76%	24%	-%	-%	50%	77%	66%	44%	56%	75%	25%
Data services	31	8	15	8	21	5	-	-	23	7	-	-	17	23	15	11	20	23	8
	42%	51%	33%	58%	38%	34%	-%	-%	41%	41%	-%	-%	44%	47%	40%	33%	48%	42%	40%
		25%	48%	27%	67%	16%	-%	-%	74%	22%	-%	-%	56%	74%	48%	34%	65%	75%	25%
Video conferencing	17	3	10	3	14	1	-	-	14	2	-	-	11	14	9	5	12	15	2
	22%	22%	23%	20%	25%	8%	-%	-%	25%	12%	-%	-%	28%	28%	25%	14%	27%	26%	10%
		20%	63%	17%	82%	7%	-%	-%	85%	12%	-%	-%	67%	83%	57%	28%	70%	88%	12%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 91

## E7C. What does your organisation use your IP services for? (MULTI CODE)

Base : Those who use IP-based alternatives and mostly use an ISDN service

	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
	LAST YEAR	EVER	NEVER	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK	
Significance Level: 95%	*a	b	/DK	d	*e	*f	*g	h	*i	*j	*k	l	m	n	o	p	q	*r	
Unweighted total	85	19	48	18	63	15	-	-	63	20	-	-	44	59	45	34	50	62	23
Effective Weighted Sample	73	18	40	15	53	14	-	-	53	18	-	-	36	55	40	28	45	53	20
Total	75	15	45	14	55	14	-	-	57	17	-	-	40	50	38	33	42	55	20
		20%	60%	19%	73%	19%	-%	-%	76%	22%	-%	-%	53%	66%	51%	43%	56%	74%	26%
Card payments	16	5	7	4	12	2	-	-	12	3	-	-	10	11	11	6	10	13	3
	21%	31%	15%	29%	22%	15%	-%	-%	20%	21%	-%	-%	25%	21%	30%	18%	23%	23%	15%
		30%	43%	27%	76%	14%	-%	-%	73%	22%	-%	-%	62%	67%	72%	38%	62%	81%	19%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 92**

## **E7D. And what is the main reason you use your IP services? (SINGLE CODE)**

Base : Those who use IP-based alternatives and mostly use an ISDN service

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											
	Total	1-49 *a	50-249 *b	250+ c	UNDER				ISDN2 h	ISDN30				IP NOT ISDN *m	ISDN2 & IP n	ISDN30 & IP o	ISDN & IP p	IP		ANY s
					£1M *d	£1M- £20M *e	£21M-£100M OM *f	OVER £100M g		ISDN30 ONLY i	ISDN2 ONLY *j	ONLY *k	BOTH ISDN l					SWITCHED q	IP NOT SWITCHED *r	
Significance Level: 95%																				
Unweighted total	85	10	25	50	7	20	26	31	67	61	24	18	43	-	67	61	85	67	16	85
Effective Weighted Sample	73	8	25	47	5	18	24	28	55	60	15	18	42	-	55	60	73	58	14	73
Total	75	14	28	34	9	19	22	24	57	54	21	18	37	-	57	54	75	61	13	75
		18%	37%	45%	12%	26%	30%	32%	77%	73%	27%	23%	49%	-%	77%	73%	100%	81%	17%	100%
Incoming calls	18	4	3	11	3	2	4	8	15	14	5	3	10	-	15	14	18	18	*	18
	24%	30%	11%	33%	33%	13%	20%	35%	27%	25%	23%	17%	28%	-%	27%	25%	24%	30%	3%	24%
		22%	17%	61%	17%	13%	24%	46%	83%	74%	26%	17%	57%	-%	83%	74%	100%	98%	2%	100%
Internet services	15	3	7	6	1	1	7	6	12	12	4	3	9	-	12	12	15	13	2	15
	21%	19%	24%	19%	12%	7%	31%	26%	21%	22%	18%	18%	24%	-%	21%	22%	21%	22%	12%	21%
		16%	42%	41%	7%	9%	44%	40%	80%	76%	24%	20%	56%	-%	80%	76%	100%	87%	10%	100%
Outgoing calls	14	5	6	3	2	7	2	3	10	8	6	4	3	-	10	8	14	10	4	14
	19%	33%	23%	9%	20%	35%	9%	12%	17%	14%	31%	24%	9%	-%	17%	14%	19%	17%	29%	19%
		32%	45%	23%	14%	49%	14%	20%	70%	54%	46%	30%	24%	-%	70%	54%	100%	73%	27%	100%
Data services	9	1	3	4	1	1	4	3	5	7	2	4	3	-	5	7	9	4	3	9
	12%	10%	11%	13%	15%	5%	16%	12%	9%	13%	9%	21%	9%	-%	9%	13%	12%	7%	26%	12%
		16%	35%	49%	16%	12%	41%	31%	59%	79%	21%	41%	38%	-%	59%	79%	100%	50%	38%	100%
Calls between different sites	8	-	3	5	-	4	2	2	5	6	2	3	3	-	5	6	8	6	2	8
	11%	-%	11%	15%	-%	23%	10%	7%	10%	11%	10%	16%	9%	-%	10%	11%	11%	11%	14%	11%
		-%	37%	63%	-%	54%	27%	19%	66%	75%	25%	34%	41%	-%	66%	75%	100%	78%	22%	100%
Security/alarm systems	4	1	1	2	1	1	1	1	3	4	*	1	3	-	3	4	4	3	1	4
	5%	7%	4%	6%	11%	4%	5%	5%	6%	7%	2%	4%	8%	-%	6%	7%	5%	5%	9%	5%
		25%	26%	50%	25%	20%	26%	30%	80%	90%	10%	20%	70%	-%	80%	90%	100%	70%	30%	100%
Fax services	4	-	3	1	-	1	2	1	4	4	-	-	4	-	4	4	4	3	1	4
	5%	-%	11%	2%	-%	5%	9%	3%	7%	7%	-%	-%	11%	-%	7%	7%	5%	5%	6%	5%
		-%	80%	20%	-%	27%	53%	20%	100%	100%	-%	-%	100%	-%	100%	100%	100%	80%	20%	100%
Card payments	2	-	1	1	1	1	-	-	2	1	1	-	1	-	2	1	2	2	-	2
	3%	-%	5%	2%	8%	7%	-%	-%	4%	1%	7%	-%	2%	-%	4%	1%	3%	4%	-%	3%
		-%	64%	36%	36%	64%	-%	-%	100%	36%	64%	-%	36%	-%	100%	36%	100%	100%	-%	100%

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 92**

## **E7D. And what is the main reason you use your IP services? (SINGLE CODE)**

Base : Those who use IP-based alternatives and mostly use an ISDN service

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
Significance Level: 95%		a	b	*c	d	*e	f	*g	h	i	j	*k	l	*m	n	o	*p	q
Unweighted total	85	52	33	-	45	22	39	22	52	33	72	13	71	1	36	49	22	63
Effective Weighted Sample	73	41	32	-	40	16	38	22	44	29	61	12	60	1	30	44	17	57
Total	75	44	31	-	37	21	35	20	47	28	65	10	64	1	36	39	21	54
		59%	41%	-%	49%	27%	47%	26%	63%	37%	87%	13%	85%	1%	48%	52%	28%	72%
Incoming calls	18	14	5	-	11	5	8	5	15	4	17	1	16	1	8	10	4	14
	24%	31%	15%	-%	29%	23%	24%	26%	31%	13%	26%	14%	25%	100%	23%	25%	20%	26%
		75%	25%	-%	58%	26%	46%	28%	80%	20%	92%	8%	88%	4%	46%	54%	23%	77%
Internet services	15	9	6	-	9	3	7	5	8	7	13	3	13	-	7	8	2	14
	21%	20%	21%	-%	25%	14%	21%	23%	17%	26%	20%	26%	20%	-%	20%	21%	7%	26%
		58%	42%	-%	61%	19%	47%	29%	53%	47%	83%	17%	83%	-%	46%	54%	10%	90%
Outgoing calls	14	10	4	-	6	4	4	4	8	6	12	2	12	-	9	5	4	10
	19%	22%	13%	-%	16%	19%	11%	19%	16%	22%	19%	16%	19%	-%	24%	14%	17%	19%
		70%	30%	-%	43%	27%	28%	26%	56%	44%	89%	11%	89%	-%	61%	39%	25%	75%
Data services	9	3	5	-	3	3	4	3	6	2	7	2	7	-	3	6	3	6
	12%	8%	18%	-%	7%	13%	13%	13%	14%	9%	11%	18%	11%	-%	7%	16%	15%	10%
		38%	62%	-%	29%	29%	50%	29%	73%	27%	79%	21%	79%	-%	29%	71%	36%	64%
Calls between different sites	8	4	4	-	4	1	5	1	6	3	7	1	7	-	4	5	4	4
	11%	9%	14%	-%	11%	6%	16%	4%	12%	10%	11%	14%	11%	-%	11%	11%	21%	7%
		47%	53%	-%	51%	15%	65%	9%	68%	32%	83%	17%	83%	-%	46%	54%	54%	46%
Security/alarm systems	4	1	3	-	1	2	3	1	3	1	4	*	4	-	2	2	2	2
	5%	3%	9%	-%	3%	10%	7%	5%	6%	5%	6%	4%	6%	-%	6%	5%	11%	3%
		30%	70%	-%	30%	50%	65%	25%	65%	35%	90%	10%	90%	-%	50%	50%	55%	45%
Fax services	4	2	2	-	3	1	3	1	2	2	4	-	4	-	1	3	1	3
	5%	4%	7%	-%	8%	5%	8%	5%	4%	7%	6%	-%	6%	-%	3%	7%	5%	5%
		47%	53%	-%	73%	27%	73%	27%	53%	47%	100%	-%	100%	-%	27%	73%	27%	73%
Card payments	2	1	1	-	-	2	-	1	-	2	1	1	1	-	2	-	1	1
	3%	3%	3%	-%	-%	11%	-%	4%	-%	8%	2%	8%	2%	-%	6%	-%	4%	3%
		64%	36%	-%	-%	100%	-%	36%	-%	100%	64%	36%	64%	-%	100%	-%	36%	64%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 92

## E7D. And what is the main reason you use your IP services? (SINGLE CODE)

Base : Those who use IP-based alternatives and mostly use an ISDN service

	SWITCHING ISDN SUPPLIER				CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
	Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%		*a	b	*c	d	*e	*f	*g	h	*i	*j	*k	l	m	n	o	p	q	*r
Unweighted total	85	19	48	18	63	15	-	-	63	20	-	-	44	59	45	34	50	62	23
Effective Weighted Sample	73	18	40	15	53	14	-	-	53	18	-	-	36	55	40	28	45	53	20
Total	75	15	45	14	55	14	-	-	57	17	-	-	40	50	38	33	42	55	20
		20%	60%	19%	73%	19%	-%	-%	76%	22%	-%	-%	53%	66%	51%	43%	56%	74%	26%
Incoming calls	18	8	10	*	16	1	-	-	13	5	-	-	14	13	10	7	11	17	2
	24%	51%	23%	3%	29%	7%	-%	-%	23%	30%	-%	-%	35%	25%	27%	22%	27%	30%	9%
		42%	56%	2%	86%	6%	-%	-%	73%	27%	-%	-%	76%	69%	57%	39%	61%	90%	10%
Internet services	15	3	11	2	13	2	-	-	13	2	-	-	5	11	12	3	12	12	3
	21%	18%	24%	14%	24%	15%	-%	-%	23%	12%	-%	-%	12%	23%	31%	11%	27%	22%	17%
		18%	70%	13%	86%	14%	-%	-%	85%	12%	-%	-%	30%	73%	76%	23%	75%	78%	22%
Outgoing calls	14	1	9	4	9	4	-	-	11	3	-	-	8	7	6	9	5	8	6
	19%	7%	20%	26%	16%	26%	-%	-%	20%	16%	-%	-%	19%	13%	15%	27%	12%	14%	33%
		7%	65%	27%	63%	27%	-%	-%	81%	19%	-%	-%	55%	47%	42%	63%	37%	54%	46%
Data services	9	1	4	4	4	3	-	-	4	4	-	-	5	6	2	4	5	6	3
	12%	5%	8%	31%	7%	24%	-%	-%	7%	24%	-%	-%	12%	12%	4%	11%	12%	10%	16%
		9%	41%	50%	41%	38%	-%	-%	46%	45%	-%	-%	55%	66%	18%	41%	59%	64%	36%
Calls between different sites	8	3	3	2	7	1	-	-	7	1	-	-	3	7	5	4	4	5	3
	11%	20%	8%	13%	13%	10%	-%	-%	13%	6%	-%	-%	9%	14%	14%	14%	9%	10%	16%
		36%	41%	22%	83%	17%	-%	-%	88%	12%	-%	-%	41%	83%	62%	54%	46%	63%	37%
Security/alarm systems	4	-	3	1	2	1	-	-	3	1	-	-	2	3	2	2	2	3	1
	5%	-%	6%	8%	4%	5%	-%	-%	5%	7%	-%	-%	5%	6%	5%	5%	5%	6%	4%
		-%	70%	30%	50%	20%	-%	-%	70%	30%	-%	-%	45%	70%	44%	44%	56%	80%	20%
Fax services	4	-	3	1	2	2	-	-	3	1	-	-	2	3	-	1	3	3	1
	5%	-%	7%	5%	4%	13%	-%	-%	5%	5%	-%	-%	5%	6%	-%	3%	7%	5%	5%
		-%	80%	20%	53%	47%	-%	-%	80%	20%	-%	-%	53%	73%	-%	27%	73%	73%	27%
Card payments	2	-	2	-	2	-	-	-	2	-	-	-	1	1	1	2	-	2	-
	3%	-%	5%	-%	4%	-%	-%	-%	4%	-%	-%	-%	3%	2%	4%	7%	-%	4%	-%
		-%	100%	-%	100%	-%	-%	-%	100%	-%	-%	-%	64%	36%	64%	100%	-%	100%	-%
Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																			

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r



# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 93**

## **E8A. Why hasn't your organisation migrated all of your ISDN usage to IP services? (MULTI CODE)**

Base : Those who use an ISDN service as a supplementary service in addition to their main service

	Total	COMPANY SIZE			TURNOVER				TELECOMS PROVISION											IP SWITCHED		IP NOT SWITCHED		ANY IP *s
		1-49 *a	50-249 *b	250+ *c	UNDER				ISDN2 *h	ISDN30 *i	ISDN2 ONLY *j	ISDN30 ONLY *k	BOTH ISDN *l	IP NOT ISDN *m	ISDN2 & IP *n	ISDN30 & IP *o	ISDN & IP *p	ISDN *q	ISDN *r					
					£1M *d	£1M-£20M *e	£21M-£100M *f	OVER £100M *g																
Significance Level: 95%																								
Unweighted total	20	-	2	18	-	4	10	6	15	15	5	5	10	-	15	15	20	-	-	20				
Effective Weighted Sample	19	-	2	17	-	4	9	6	14	15	5	5	10	-	14	15	19	-	-	19				
Total	14	-	2	12	-	3	8	4	10	12	2	4	8	-	10	12	14	-	-	14				
		-%	14%	86%	-%	19%	53%	28%	71%	86%	14%	29%	56%	-%	71%	86%	100%	-%	-%	100%				
Current supplier(s) understand our business	7	-	1	6	-	1	3	3	5	7	-	2	5	-	5	7	7	-	-	7				
	45%	-%	50%	45%	-%	28%	34%	79%	49%	53%	-%	38%	61%	-%	49%	53%	45%	-%	-%	45%				
		-%	16%	84%	-%	12%	40%	48%	76%	100%	-%	24%	76%	-%	76%	100%	100%	-%	-%	100%				
Alternatives aren't reliable enough	6	-	-	6	-	1	2	4	4	6	*	2	4	-	4	6	6	-	-	6				
	41%	-%	-%	48%	-%	28%	21%	90%	43%	45%	20%	38%	49%	-%	43%	45%	41%	-%	-%	41%				
		-%	-%	100%	-%	13%	27%	60%	73%	93%	7%	27%	66%	-%	73%	93%	100%	-%	-%	100%				
Tied to long term contract	5	-	1	4	-	1	3	2	4	5	*	2	3	-	4	5	5	-	-	5				
	37%	-%	50%	35%	-%	43%	34%	40%	35%	40%	20%	43%	39%	-%	35%	40%	37%	-%	-%	37%				
		-%	19%	81%	-%	22%	48%	29%	66%	92%	8%	34%	59%	-%	66%	92%	100%	-%	-%	100%				
Internal cost of migrating	5	-	1	4	-	1	3	1	5	4	*	-	4	-	5	4	5	-	-	5				
	32%	-%	50%	29%	-%	28%	40%	20%	45%	34%	20%	-%	51%	-%	45%	34%	32%	-%	-%	32%				
		-%	22%	78%	-%	17%	66%	17%	100%	91%	9%	-%	91%	-%	100%	91%	100%	-%	-%	100%				
Good contacts at existing ISDN company	4	-	1	3	-	1	2	2	3	4	-	1	3	-	3	4	4	-	-	4				
	29%	-%	50%	26%	-%	28%	24%	40%	33%	34%	-%	19%	42%	-%	33%	34%	29%	-%	-%	29%				
		-%	25%	75%	-%	19%	43%	38%	81%	100%	-%	19%	81%	-%	81%	100%	100%	-%	-%	100%				
Was offered an attractive package/range of services	3	-	1	2	-	-	3	1	3	3	-	1	3	-	3	3	3	-	-	3				
	24%	-%	50%	19%	-%	-%	34%	20%	26%	28%	-%	19%	32%	-%	26%	28%	24%	-%	-%	24%				
		-%	30%	70%	-%	-%	77%	23%	77%	100%	-%	23%	77%	-%	77%	100%	100%	-%	-%	100%				
Hassle	2	-	-	2	-	1	2	-	1	2	-	2	1	-	1	2	2	-	-	2				
	16%	-%	-%	19%	-%	28%	21%	-%	8%	19%	-%	38%	10%	-%	8%	19%	16%	-%	-%	16%				
		-%	-%	100%	-%	33%	67%	-%	33%	100%	-%	67%	33%	-%	33%	100%	100%	-%	-%	100%				
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																								

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 93**

## **E8A. Why hasn't your organisation migrated all of your ISDN usage to IP services? (MULTI CODE)**

Base : Those who use an ISDN service as a supplementary service in addition to their main service

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											IP SWITCHED		IP NOT SWITCHED	ANY IP
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	ISDN	ISDN				
					£1M	£1M-£20M	£21M-£100M	OVER £100M															
Significance Level: 95%		*a	*b	*c	*d	*e	*f	*g	*h	*i	*j	*k	*l	*m	*n	*o	*p	*q	*r	*s			
Unweighted total	20	-	2	18	-	4	10	6	15	15	5	5	10	-	15	15	20	-	-	20			
Effective Weighted Sample	19	-	2	17	-	4	9	6	14	15	5	5	10	-	14	15	19	-	-	19			
Total	14	-	2	12	-	3	8	4	10	12	2	4	8	-	10	12	14	-	-	14			
		-%	14%	86%	-%	19%	53%	28%	71%	86%	14%	29%	56%	-%	71%	86%	100%	-%	-%	100%			
Current service features are what we need	2	-	1	1	-	-	1	1	2	2	*	-	2	-	2	2	2	-	-	2			
	16%	-%	50%	10%	-%	-%	19%	20%	22%	15%	20%	-%	22%	-%	22%	15%	16%	-%	-%	16%			
		-%	46%	54%	-%	-%	65%	35%	100%	81%	19%	-%	81%	-%	100%	81%	100%	-%	-%	100%			
Historic links to existing ISDN company(s)	2	-	-	2	-	-	-	2	2	2	-	-	2	-	2	2	2	-	-	2			
	11%	-%	-%	13%	-%	-%	-%	40%	15%	13%	-%	-%	19%	-%	15%	13%	11%	-%	-%	11%			
		-%	-%	100%	-%	-%	-%	100%	100%	100%	-%	-%	100%	-%	100%	100%	100%	-%	-%	100%			
Other	1	-	-	1	-	-	1	-	-	1	-	1	-	-	-	1	1	-	-	1			
	5%	-%	-%	6%	-%	-%	10%	-%	-%	6%	-%	19%	-%	-%	-%	6%	5%	-%	-%	5%			
		-%	-%	100%	-%	-%	100%	-%	-%	100%	-%	100%	-%	-%	-%	100%	100%	-%	-%	100%			
None of the above	*	-	-	*	-	-	-	*	*	-	*	-	-	-	*	-	*	-	-	*			
	3%	-%	-%	3%	-%	-%	-%	10%	4%	-%	20%	-%	-%	-%	4%	-%	3%	-%	-%	3%			
		-%	-%	100%	-%	-%	-%	100%	100%	-%	100%	-%	-%	-%	100%	-%	100%	-%	-%	100%			

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 93

## E8A. Why hasn't your organisation migrated all of your ISDN usage to IP services? (MULTI CODE)

Base : Those who use an ISDN service as a supplementary service in addition to their main service

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30		ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
			*a	*b														
Significance Level: 95%																		
Unweighted total	20	-	-	20	-	-	-	-	14	6	-	-	-	-	5	15	5	13
Effective Weighted Sample	19	-	-	19	-	-	-	-	13	5	-	-	-	-	5	14	5	12
Total	14	-	-	14	-	-	-	-	11	4	-	-	-	-	4	11	4	9
		-	-	100%	-	-	-	-	75%	25%	-	-	-	-	26%	74%	29%	61%
Current supplier(s) understand our business	7	-	-	7	-	-	-	-	7	-	-	-	-	-	3	4	3	4
	45%	-	-	45%	-	-	-	-	61%	-	-	-	-	-	68%	37%	62%	45%
		-	-	100%	-	-	-	-	100%	-	-	-	-	-	40%	60%	40%	60%
Alternatives aren't reliable enough	6	-	-	6	-	-	-	-	5	1	-	-	-	-	1	5	1	5
	41%	-	-	41%	-	-	-	-	44%	33%	-	-	-	-	21%	49%	19%	54%
		-	-	100%	-	-	-	-	80%	20%	-	-	-	-	13%	87%	13%	80%
Tied to long term contract	5	-	-	5	-	-	-	-	3	3	-	-	-	-	*	5	2	3
	37%	-	-	37%	-	-	-	-	24%	77%	-	-	-	-	11%	47%	38%	32%
		-	-	100%	-	-	-	-	48%	52%	-	-	-	-	8%	92%	29%	52%
Internal cost of migrating	5	-	-	5	-	-	-	-	3	1	-	-	-	-	2	3	2	3
	32%	-	-	32%	-	-	-	-	31%	33%	-	-	-	-	48%	26%	43%	32%
		-	-	100%	-	-	-	-	74%	26%	-	-	-	-	40%	60%	40%	60%
Good contacts at existing ISDN company	4	-	-	4	-	-	-	-	4	-	-	-	-	-	3	2	1	3
	29%	-	-	29%	-	-	-	-	39%	-	-	-	-	-	68%	15%	25%	36%
		-	-	100%	-	-	-	-	100%	-	-	-	-	-	62%	38%	25%	75%
Was offered an attractive package/range of services	3	-	-	3	-	-	-	-	3	-	-	-	-	-	2	2	1	2
	24%	-	-	24%	-	-	-	-	31%	-	-	-	-	-	48%	15%	25%	27%
		-	-	100%	-	-	-	-	100%	-	-	-	-	-	54%	46%	30%	70%
Hassle	2	-	-	2	-	-	-	-	2	1	-	-	-	-	1	2	-	2
	16%	-	-	16%	-	-	-	-	15%	22%	-	-	-	-	21%	15%	-	27%
		-	-	100%	-	-	-	-	67%	33%	-	-	-	-	33%	67%	-	100%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 93

## E8A. Why hasn't your organisation migrated all of your ISDN usage to IP services? (MULTI CODE)

Base : Those who use an ISDN service as a supplementary service in addition to their main service

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
Significance Level: 95%		*a	*b	*c	*d	*e	*f	*g	*h	*i	*j	*k	*l	*m	*n	*o	*p	*q
Unweighted total	20	-	-	20	-	-	-	-	14	6	-	-	-	-	5	15	5	13
Effective Weighted Sample	19	-	-	19	-	-	-	-	13	5	-	-	-	-	5	14	5	12
Total	14	-	-	14	-	-	-	-	11	4	-	-	-	-	4	11	4	9
		-%	-%	100%	-%	-%	-%	-%	75%	25%	-%	-%	-%	-%	26%	74%	29%	61%
Current service features are what we need	2	-	-	2	-	-	-	-	2	-	-	-	-	-	1	1	1	1
	16%	-%	-%	16%	-%	-%	-%	-%	21%	-%	-%	-%	-%	-%	27%	11%	25%	14%
		-%	-%	100%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	46%	54%	46%	54%
Historic links to existing ISDN company(s)	2	-	-	2	-	-	-	-	2	-	-	-	-	-	-	2	-	2
	11%	-%	-%	11%	-%	-%	-%	-%	15%	-%	-%	-%	-%	-%	-%	15%	-%	18%
		-%	-%	100%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	-%	100%	-%	100%
Other	1	-	-	1	-	-	-	-	1	-	-	-	-	-	-	1	-	1
	5%	-%	-%	5%	-%	-%	-%	-%	7%	-%	-%	-%	-%	-%	-%	7%	-%	9%
		-%	-%	100%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	-%	100%	-%	100%
None of the above	*	-	-	*	-	-	-	-	*	-	-	-	-	-	-	*	-	*
	3%	-%	-%	3%	-%	-%	-%	-%	4%	-%	-%	-%	-%	-%	-%	4%	-%	5%
		-%	-%	100%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	-%	100%	-%	100%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 93**

## **E8A. Why hasn't your organisation migrated all of your ISDN usage to IP services? (MULTI CODE)**

Base : Those who use an ISDN service as a supplementary service in addition to their main service

	Total	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
		NEVER			YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
		LAST YEAR	EVER	/DK															
Significance Level: 95%		*a	*b	*c	*d	*e	*f	*g	*h	*i	*j	*k	*l	*m	*n	*o	*p	*q	*r
Unweighted total	20	-	-	-	-	-	-	-	-	-	-	-	11	17	13	6	11	17	3
Effective Weighted Sample	19	-	-	-	-	-	-	-	-	-	-	-	10	16	13	6	10	16	3
Total	14	-	-	-	-	-	-	-	-	-	-	-	8	12	10	5	8	12	2
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	57%	84%	70%	33%	58%	84%	16%
Current supplier(s) understand our business	7	-	-	-	-	-	-	-	-	-	-	-	4	6	6	2	5	6	1
	45%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	51%	48%	57%	33%	59%	48%	33%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	64%	88%	88%	24%	76%	88%	12%
Alternatives aren't reliable enough	6	-	-	-	-	-	-	-	-	-	-	-	3	6	5	1	5	4	2
	41%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	39%	49%	47%	17%	56%	36%	67%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	53%	100%	80%	13%	80%	73%	27%
Tied to long term contract	5	-	-	-	-	-	-	-	-	-	-	-	4	5	4	2	4	5	1
	37%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	44%	45%	35%	33%	45%	38%	33%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	66%	100%	66%	29%	71%	85%	15%
Internal cost of migrating	5	-	-	-	-	-	-	-	-	-	-	-	4	4	4	2	3	4	1
	32%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	47%	32%	41%	33%	31%	32%	33%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	83%	83%	91%	34%	57%	83%	17%
Good contacts at existing ISDN company	4	-	-	-	-	-	-	-	-	-	-	-	3	4	4	2	3	3	1
	29%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	32%	35%	41%	33%	31%	28%	33%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	62%	100%	100%	38%	62%	81%	19%
Was offered an attractive package/range of services	3	-	-	-	-	-	-	-	-	-	-	-	3	3	3	1	3	2	2
	24%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	32%	22%	34%	17%	31%	15%	67%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	77%	77%	100%	23%	77%	54%	46%
Hassle	2	-	-	-	-	-	-	-	-	-	-	-	2	2	2	-	2	1	2
	16%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	19%	13%	23%	-%	28%	7%	67%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	67%	67%	100%	-%	100%	33%	67%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 93

## E8A. Why hasn't your organisation migrated all of your ISDN usage to IP services? (MULTI CODE)

Base : Those who use an ISDN service as a supplementary service in addition to their main service

	Total	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
		NEVER			YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
		LAST YEAR	EVER	/DK															
Significance Level: 95%		*a	*b	*c	*d	*e	*f	*g	*h	*i	*j	*k	*l	*m	*n	*o	*p	*q	*r
Unweighted total	20	-	-	-	-	-	-	-	-	-	-	-	11	17	13	6	11	17	3
Effective Weighted Sample	19	-	-	-	-	-	-	-	-	-	-	-	10	16	13	6	10	16	3
Total	14	-	-	-	-	-	-	-	-	-	-	-	8	12	10	5	8	12	2
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	57%	84%	70%	33%	58%	84%	16%
Current service features are what we need	2	-	-	-	-	-	-	-	-	-	-	-	2	2	2	-	2	2	-
	16%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	22%	19%	18%	-%	27%	19%	-%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	81%	100%	81%	-%	100%	100%	-%
Historic links to existing ISDN company(s)	2	-	-	-	-	-	-	-	-	-	-	-	2	2	2	-	2	2	-
	11%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	19%	13%	16%	-%	19%	13%	-%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	100%	100%	100%	-%	100%	100%	-%
Other	1	-	-	-	-	-	-	-	-	-	-	-	1	-	-	1	-	1	-
	5%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	10%	-%	-%	17%	-%	7%	-%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	100%	-%	-%	100%	-%	100%	-%
None of the above	*	-	-	-	-	-	-	-	-	-	-	-	-	*	-	-	-	*	-
	3%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	3%	-%	-%	-%	3%	-%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	100%	-%	-%	-%	100%	-%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 94**

**E8B. And what is the main reason you haven't migrated all of your ISDN usage to IP services? (SINGLE CODE)**

Base : Those who use an ISDN service as a supplementary service in addition to their main service

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											IP SWITCHED		IP NOT SWITCHED		ANY IP *s
	Total	1-49 *a	50-249 *b	250+ *c	UNDER				ISDN2 *h	ISDN30 *i	ISDN2 ONLY *j	ISDN30 ONLY *k	BOTH ISDN *l	IP NOT ISDN *m	ISDN2 & IP *n	ISDN30 & IP *o	ISDN & IP *p	ISDN *q	ISDN *r					
					£1M *d	£1M-£20M *e	£21M-£100M *f	OVER £100M *g																
Significance Level: 95%																								
Unweighted total	20	-	2	18	-	4	10	6	15	15	5	5	10	-	15	15	20	-	-	20				
Effective Weighted Sample	19	-	2	17	-	4	9	6	14	15	5	5	10	-	14	15	19	-	-	19				
Total	14	-	2	12	-	3	8	4	10	12	2	4	8	-	10	12	14	-	-	14				
		-%	14%	86%	-%	19%	53%	28%	71%	86%	14%	29%	56%	-%	71%	86%	100%	-%	-%	100%				
Tied to long term contract	4	-	1	3	-	1	2	1	2	3	*	2	2	-	2	3	4	-	-	4				
	26%	-%	50%	23%	-%	43%	24%	20%	20%	28%	20%	43%	19%	-%	20%	28%	26%	-%	-%	26%				
		-%	27%	73%	-%	32%	48%	21%	52%	89%	11%	48%	41%	-%	52%	89%	100%	-%	-%	100%				
Internal cost of migrating	3	-	-	3	-	1	2	-	3	2	*	-	2	-	3	2	3	-	-	3				
	19%	-%	-%	23%	-%	28%	26%	-%	27%	19%	20%	-%	29%	-%	27%	19%	19%	-%	-%	19%				
		-%	-%	100%	-%	28%	72%	-%	100%	85%	15%	-%	85%	-%	100%	85%	100%	-%	-%	100%				
Current supplier(s) understand our business	2	-	-	2	-	1	1	1	2	2	-	1	2	-	2	2	2	-	-	2				
	16%	-%	-%	19%	-%	28%	10%	20%	15%	19%	-%	19%	19%	-%	15%	19%	16%	-%	-%	16%				
		-%	-%	100%	-%	33%	33%	33%	67%	100%	-%	33%	67%	-%	67%	100%	100%	-%	-%	100%				
Good contacts at existing ISDN company	2	-	-	2	-	-	1	1	1	2	-	1	1	-	1	2	2	-	-	2				
	11%	-%	-%	13%	-%	-%	10%	20%	8%	13%	-%	19%	10%	-%	8%	13%	11%	-%	-%	11%				
		-%	-%	100%	-%	-%	50%	50%	50%	100%	-%	50%	50%	-%	50%	100%	100%	-%	-%	100%				
Alternatives aren't reliable enough	1	-	-	1	-	-	-	1	1	1	*	-	1	-	1	1	1	-	-	1				
	8%	-%	-%	10%	-%	-%	-%	30%	12%	6%	20%	-%	10%	-%	12%	6%	8%	-%	-%	8%				
		-%	-%	100%	-%	-%	-%	100%	100%	65%	35%	-%	65%	-%	100%	65%	100%	-%	-%	100%				
Was offered an attractive package/range of services	1	-	1	-	-	-	1	-	1	1	-	-	1	-	1	1	1	-	-	1				
	7%	-%	50%	-%	-%	-%	14%	-%	10%	8%	-%	-%	13%	-%	10%	8%	7%	-%	-%	7%				
		-%	100%	-%	-%	-%	100%	-%	100%	100%	-%	-%	100%	-%	100%	100%	100%	-%	-%	100%				
Current service features are what we need	*	-	-	*	-	-	*	-	*	-	*	-	-	-	*	-	*	-	-	*				
	3%	-%	-%	3%	-%	-%	5%	-%	4%	-%	20%	-%	-%	-%	4%	-%	3%	-%	-%	3%				
		-%	-%	100%	-%	-%	100%	-%	100%	-%	100%	-%	-%	-%	100%	-%	100%	-%	-%	100%				

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 94**

**E8B. And what is the main reason you haven't migrated all of your ISDN usage to IP services? (SINGLE CODE)**

Base : Those who use an ISDN service as a supplementary service in addition to their main service

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	IP SWITCHED		IP NOT SWITCHED	ANY IP
					£1M	£1M-£20M	£21M-£100M	OVER £100M									ISDN	ISDN		
																			ISDN	
Significance Level: 95%	*a	*b	*c	*d	*e	*f	*g	*h	*i	*j	*k	*l	*m	*n	*o	*p	*q	*r	*s	
Unweighted total	20	-	2	18	-	4	10	6	15	15	5	5	10	-	15	15	20	-	-	20
Effective Weighted Sample	19	-	2	17	-	4	9	6	14	15	5	5	10	-	14	15	19	-	-	19
Total	14	-	2	12	-	3	8	4	10	12	2	4	8	-	10	12	14	-	-	14
		-%	14%	86%	-%	19%	53%	28%	71%	86%	14%	29%	56%	-%	71%	86%	100%	-%	-%	100%
Other	1	-	-	1	-	-	1	-	-	1	-	1	-	-	-	1	1	-	-	1
	5%	-%	-%	6%	-%	-%	10%	-%	-%	6%	-%	19%	-%	-%	-%	6%	5%	-%	-%	5%
		-%	-%	100%	-%	-%	100%	-%	-%	100%	-%	100%	-%	-%	-%	100%	100%	-%	-%	100%
None of the above	*	-	-	*	-	-	-	*	*	-	*	-	-	-	*	-	*	-	-	*
	3%	-%	-%	3%	-%	-%	-%	10%	4%	-%	20%	-%	-%	-%	4%	-%	3%	-%	-%	3%
		-%	-%	100%	-%	-%	-%	100%	100%	-%	100%	-%	-%	-%	100%	-%	100%	-%	-%	100%

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s



# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 94**

**E8B. And what is the main reason you haven't migrated all of your ISDN usage to IP services? (SINGLE CODE)**

Base : Those who use an ISDN service as a supplementary service in addition to their main service

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30		ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
			*a	*b														
Significance Level: 95%																		
Unweighted total	20	-	-	20	-	-	-	-	14	6	-	-	-	-	5	15	5	13
Effective Weighted Sample	19	-	-	19	-	-	-	-	13	5	-	-	-	-	5	14	5	12
Total	14	-	-	14	-	-	-	-	11	4	-	-	-	-	4	11	4	9
		-	-	100%	-	-	-	-	75%	25%	-	-	-	-	26%	74%	29%	61%
Tied to long term contract	4	-	-	4	-	-	-	-	2	2	-	-	-	-	*	3	1	2
	26%	-	-	26%	-	-	-	-	17%	55%	-	-	-	-	11%	32%	19%	23%
		-	-	100%	-	-	-	-	48%	52%	-	-	-	-	11%	89%	21%	52%
Internal cost of migrating	3	-	-	3	-	-	-	-	2	1	-	-	-	-	1	2	1	2
	19%	-	-	19%	-	-	-	-	15%	33%	-	-	-	-	21%	19%	19%	23%
		-	-	100%	-	-	-	-	57%	43%	-	-	-	-	28%	72%	28%	72%
Current supplier(s) understand our business	2	-	-	2	-	-	-	-	2	-	-	-	-	-	1	2	2	1
	16%	-	-	16%	-	-	-	-	22%	-	-	-	-	-	21%	15%	38%	9%
		-	-	100%	-	-	-	-	100%	-	-	-	-	-	33%	67%	67%	33%
Good contacts at existing ISDN company	2	-	-	2	-	-	-	-	2	-	-	-	-	-	1	1	-	2
	11%	-	-	11%	-	-	-	-	15%	-	-	-	-	-	21%	7%	-	18%
		-	-	100%	-	-	-	-	100%	-	-	-	-	-	50%	50%	-	100%
Alternatives aren't reliable enough	1	-	-	1	-	-	-	-	1	*	-	-	-	-	-	1	-	1
	8%	-	-	8%	-	-	-	-	7%	12%	-	-	-	-	-	11%	-	9%
		-	-	100%	-	-	-	-	65%	35%	-	-	-	-	-	100%	-	65%
Was offered an attractive package/range of services	1	-	-	1	-	-	-	-	1	-	-	-	-	-	1	-	1	-
	7%	-	-	7%	-	-	-	-	10%	-	-	-	-	-	27%	-	25%	-
		-	-	100%	-	-	-	-	100%	-	-	-	-	-	100%	-	100%	-
Current service features are what we need	*	-	-	*	-	-	-	-	*	-	-	-	-	-	-	*	-	*
	3%	-	-	3%	-	-	-	-	4%	-	-	-	-	-	-	4%	-	5%
		-	-	100%	-	-	-	-	100%	-	-	-	-	-	-	100%	-	100%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 94

E8B. And what is the main reason you haven't migrated all of your ISDN usage to IP services? (SINGLE CODE)

Base : Those who use an ISDN service as a supplementary service in addition to their main service

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		*a	*b	*c	*d	*e	*f	*g	*h	*i	*j	*k	*l	*m	*n	*o	*p	*q
Significance Level: 95%																		
Unweighted total	20	-	-	20	-	-	-	-	14	6	-	-	-	-	5	15	5	13
Effective Weighted Sample	19	-	-	19	-	-	-	-	13	5	-	-	-	-	5	14	5	12
Total	14	-	-	14	-	-	-	-	11	4	-	-	-	-	4	11	4	9
		-%	-%	100%	-%	-%	-%	-%	75%	25%	-%	-%	-%	-%	26%	74%	29%	61%
Other	1	-	-	1	-	-	-	-	1	-	-	-	-	-	-	1	-	1
	5%	-%	-%	5%	-%	-%	-%	-%	7%	-%	-%	-%	-%	-%	-%	7%	-%	9%
		-%	-%	100%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	-%	100%	-%	100%
None of the above	*	-	-	*	-	-	-	-	*	-	-	-	-	-	-	*	-	*
	3%	-%	-%	3%	-%	-%	-%	-%	4%	-%	-%	-%	-%	-%	-%	4%	-%	5%
		-%	-%	100%	-%	-%	-%	-%	100%	-%	-%	-%	-%	-%	-%	100%	-%	100%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 94**

**E8B. And what is the main reason you haven't migrated all of your ISDN usage to IP services? (SINGLE CODE)**

Base : Those who use an ISDN service as a supplementary service in addition to their main service

	Total	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
		NEVER			YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
		LAST YEAR	EVER	/DK															
Significance Level: 95%		*a	*b	*c	*d	*e	*f	*g	*h	*i	*j	*k	*l	*m	*n	*o	*p	*q	*r
Unweighted total	20	-	-	-	-	-	-	-	-	-	-	-	11	17	13	6	11	17	3
Effective Weighted Sample	19	-	-	-	-	-	-	-	-	-	-	-	10	16	13	6	10	16	3
Total	14	-	-	-	-	-	-	-	-	-	-	-	8	12	10	5	8	12	2
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	57%	84%	70%	33%	58%	84%	16%
Tied to long term contract	4	-	-	-	-	-	-	-	-	-	-	-	2	4	2	1	3	3	1
	26%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	24%	32%	20%	17%	36%	25%	33%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	52%	100%	52%	21%	79%	79%	21%
Internal cost of migrating	3	-	-	-	-	-	-	-	-	-	-	-	2	2	2	2	1	2	1
	19%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	24%	17%	23%	33%	9%	17%	33%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	72%	72%	85%	57%	28%	72%	28%
Current supplier(s) understand our business	2	-	-	-	-	-	-	-	-	-	-	-	1	2	2	1	2	2	-
	16%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	10%	13%	23%	17%	19%	20%	-%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	33%	67%	100%	33%	67%	100%	-%
Good contacts at existing ISDN company	2	-	-	-	-	-	-	-	-	-	-	-	1	2	2	1	1	1	1
	11%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	10%	13%	16%	17%	9%	7%	33%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	50%	100%	100%	50%	50%	50%	50%
Alternatives aren't reliable enough	1	-	-	-	-	-	-	-	-	-	-	-	1	1	1	-	1	1	-
	8%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	10%	10%	8%	-%	9%	10%	-%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	65%	100%	65%	-%	65%	100%	-%
Was offered an attractive package/range of services	1	-	-	-	-	-	-	-	-	-	-	-	1	1	1	-	1	1	-
	7%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	13%	9%	10%	-%	12%	9%	-%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	100%	100%	100%	-%	100%	100%	-%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 94

E8B. And what is the main reason you haven't migrated all of your ISDN usage to IP services? (SINGLE CODE)

Base : Those who use an ISDN service as a supplementary service in addition to their main service

	Total	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
		NEVER			YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
		LAST YEAR	EVER	/DK															
Significance Level: 95%		*a	*b	*c	*d	*e	*f	*g	*h	*i	*j	*k	*l	*m	*n	*o	*p	*q	*r
Unweighted total	20	-	-	-	-	-	-	-	-	-	-	-	11	17	13	6	11	17	3
Effective Weighted Sample	19	-	-	-	-	-	-	-	-	-	-	-	10	16	13	6	10	16	3
Total	14	-	-	-	-	-	-	-	-	-	-	-	8	12	10	5	8	12	2
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	57%	84%	70%	33%	58%	84%	16%
Current service features are what we need	*	-	-	-	-	-	-	-	-	-	-	-	-	*	-	-	*	*	-
	3%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	3%	-%	-%	5%	3%	-%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	100%	-%	-%	100%	100%	-%
Other	1	-	-	-	-	-	-	-	-	-	-	-	1	-	-	1	-	1	-
	5%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	10%	-%	-%	17%	-%	7%	-%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	100%	-%	-%	100%	-%	100%	-%
None of the above	*	-	-	-	-	-	-	-	-	-	-	-	-	*	-	-	-	*	-
	3%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	3%	-%	-%	-%	3%	-%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	100%	-%	-%	-%	100%	-%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 95**

**E9. Overall, what do you regard as the main functional value(s) of IP-based services for your organisation? (MULTI CODE)**

Base : Those who use IP-based alternatives and do not mostly use an ISDN service

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											IP SWITCHED		IP NOT SWITCHED		ANY IP s
	Total	UNDER			£1M- £20M	£21M-£100M			ISDN2	ISDN30	ISDN2 ONLY	ISDN30 ONLY	BOTH ISDN	IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	ISDN	ISDN					
		1-49	50-249	250+		£1M	£1M- £20M	£21M-£100M												£100M				
Significance Level: 95%		*a	b	c	*d	e	f	g	*h	*i	*j	*k	*l	m	*n	*o	p	*q	*r					
Unweighted total	133	28	32	72	23	42	31	31	24	24	9	9	15	100	24	24	33	-	-	133				
Effective Weighted Sample	125	28	32	69	22	40	29	30	22	24	7	9	15	97	22	24	30	-	-	125				
Total	141	37	41	63	29	48	29	28	17	20	5	8	12	116	17	20	25	-	-	141				
		27%	29%	45%	20%	34%	21%	20%	12%	14%	3%	6%	9%	83%	12%	14%	17%	-%	-%	100%				
Reliable	83	20	26	37	18	29	16	19	8	7	4	3	3	72	8	7	11	-	-	83				
	59%	54%	63%	60%	64%	61%	54%	66%	46%	34%	91%	43%	28%	62%	46%	34%	45%	-%	-%	59%				
		24%	31%	45%	22%	35%	19%	22%	9%	8%	5%	4%	4%	87%	9%	8%	13%	-%	-%	100%				
Easy to use	76	24	17	35	22	25	15	12	11	13	3	4	8	61	11	13	16	-	-	76				
	54%	64%	43%	56%	76%	52%	52%	43%	67%	63%	65%	57%	67%	52%	67%	63%	63%	-%	-%	54%				
		31%	23%	46%	29%	33%	20%	16%	15%	16%	4%	6%	11%	80%	15%	16%	20%	-%	-%	100%				
Call management functionality	61	15	19	28	8	21	18	11	9	10	3	4	6	48	9	10	13	-	-	61				
	44%	39%	47%	44%	27%	43%	63%	41%	55%	50%	74%	53%	48%	41%	55%	50%	55%	-%	-%	44%				
		24%	31%	45%	13%	34%	29%	19%	15%	16%	6%	7%	9%	78%	15%	16%	22%	-%	-%	100%				
Flexible line capacity	54	12	16	26	11	18	11	13	8	4	4	1	3	46	8	4	9	-	-	54				
	39%	31%	41%	42%	40%	38%	39%	47%	46%	22%	91%	13%	28%	39%	46%	22%	35%	-%	-%	39%				
		22%	30%	48%	21%	34%	21%	25%	14%	8%	8%	2%	6%	84%	14%	8%	16%	-%	-%	100%				
Voice connectivity	54	11	18	26	11	18	12	12	10	10	3	3	7	41	10	10	13	-	-	54				
	39%	28%	44%	41%	37%	38%	43%	44%	60%	49%	74%	40%	54%	35%	60%	49%	54%	-%	-%	39%				
		20%	33%	47%	19%	33%	23%	23%	18%	18%	6%	6%	12%	76%	18%	18%	24%	-%	-%	100%				
Data connectivity	47	8	13	26	5	10	15	15	10	9	4	2	7	34	10	9	13	-	-	47				
	34%	22%	32%	42%	19%	21%	51%	52%	62%	45%	82%	30%	54%	30%	62%	45%	52%	-%	-%	34%				
		17%	27%	56%	11%	21%	e 31%	e 31%	22%	19%	8%	5%	14%	73%	22%	19%	m 27%	-%	-%	100%				
Provides voice & data communications via the same service	40	8	8	24	7	8	12	12	8	5	4	1	4	31	8	5	9	-	-	40				
	28%	22%	19%	39%	23%	17%	42%	43%	48%	25%	82%	10%	35%	27%	48%	25%	36%	-%	-%	28%				
		20%	19%	b 61%	17%	21%	e 30%	e 30%	20%	12%	10%	2%	10%	78%	20%	12%	22%	-%	-%	100%				
LAN connectivity	37	4	13	20	4	12	9	10	4	3	3	2	1	31	4	3	6	-	-	37				
	26%	10%	32%	31%	13%	24%	32%	35%	23%	16%	65%	30%	7%	26%	23%	16%	25%	-%	-%	26%				
		11%	36%	54%	10%	32%	25%	27%	10%	9%	8%	6%	2%	83%	10%	9%	17%	-%	-%	100%				
Columns Tested: a.b.c - d.e.f.g - h.i.j.k.l.m.n.o.p.q.r.s																								

Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s

# **NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES**

**Table 95**

**E9. Overall, what do you regard as the main functional value(s) of IP-based services for your organisation? (MULTI CODE)**

Base : Those who use IP-based alternatives and do not mostly use an ISDN service

	COMPANY SIZE				TURNOVER				TELECOMS PROVISION											IP SWITCHED		IP NOT SWITCHED		ANY IP
	Total	1-49	50-249	250+	UNDER				ISDN2	ISDN30	ISDN2 ONLY	ISDN30		IP NOT ISDN	ISDN2 & IP	ISDN30 & IP	ISDN & IP	ISDN	ISDN					
					£1M	£1M-£20M	£21M-£100M	£100M				ONLY	BOTH											
Significance Level: 95%		*a	b	c	*d	e	f	g	*h	i	j	*k	l	m	*n	o	p	*q	*r	s				
Unweighted total	133	28	32	72	23	42	31	31	24	24	9	9	15	100	24	24	33	-	-	133				
Effective Weighted Sample	125	28	32	69	22	40	29	30	22	24	7	9	15	97	22	24	30	-	-	125				
Total	141	37	41	63	29	48	29	28	17	20	5	8	12	116	17	20	25	-	-	141				
		27%	29%	45%	20%	34%	21%	20%	12%	14%	3%	6%	9%	83%	12%	14%	17%	-%	-%	100%				
Requires little post purchase support	33	7	9	18	7	7	10	9	10	7	3	-	7	23	10	7	10	-	-	33				
	24%	18%	22%	29%	25%	14%	35%	34%	62%	37%	65%	-%	61%	20%	62%	37%	42%	-%	-%	24%				
		20%	27%	54%	21%	20%	30%	28%	31%	22%	9%	-%	22%	69%	31%	22%	31%	-%	-%	100%				
Unified communications capability	17	3	3	12	-	5	4	7	2	2	2	2	1	13	2	2	4	-	-	17				
	12%	7%	6%	19%	-%	10%	15%	25%	15%	12%	35%	20%	7%	11%	15%	12%	16%	-%	-%	12%				
		15%	15%	69%	-%	27%	25%	40%	14%	14%	10%	9%	5%	77%	14%	14%	23%	-%	-%	100%				
LAN connectivity	15	3	4	9	3	6	3	4	3	1	3	-	1	12	3	1	3	-	-	15				
	11%	7%	10%	14%	9%	12%	11%	13%	20%	4%	56%	-%	7%	10%	20%	4%	14%	-%	-%	11%				
		16%	26%	58%	16%	38%	21%	24%	22%	5%	17%	-%	5%	78%	22%	5%	22%	-%	-%	100%				
CTI capability	11	-	4	7	3	1	3	4	3	1	3	-	1	8	3	1	3	-	-	11				
	8%	-%	10%	11%	9%	3%	11%	13%	20%	4%	56%	-%	7%	7%	20%	4%	14%	-%	-%	8%				
		-%	36%	64%	24%	13%	29%	34%	31%	7%	24%	-%	7%	69%	31%	7%	31%	-%	-%	100%				
Columns Tested: a,b,c - d,e,f,g - h,i,j,k,l,m,n,o,p,q,r,s																								

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 95

E9. Overall, what do you regard as the main functional value(s) of IP-based services for your organisation? (MULTI CODE)

Base : Those who use IP-based alternatives and do not mostly use an ISDN service

	MOSTLY USED				PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
	Total	ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		*a	*b	c	*d	*e	*f	*g	h	i	*j	*k	*l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	133	-	-	133	-	-	-	-	102	31	-	-	-	-	52	81	65	57
Effective Weighted Sample	125	-	-	125	-	-	-	-	97	28	-	-	-	-	50	75	62	53
Total	141	-	-	141	-	-	-	-	110	31	-	-	-	-	60	81	76	54
		-%	-%	100%	-%	-%	-%	-%	78%	22%	-%	-%	-%	-%	42%	58%	54%	38%
Reliable	83	-	-	83	-	-	-	-	63	20	-	-	-	-	33	50	48	29
	59%	-%	-%	59%	-%	-%	-%	-%	57%	65%	-%	-%	-%	-%	55%	62%	63%	53%
		-%	-%	100%	-%	-%	-%	-%	76%	24%	-%	-%	-%	-%	40%	60%	58%	34%
Easy to use	76	-	-	76	-	-	-	-	58	18	-	-	-	-	36	40	49	26
	54%	-%	-%	54%	-%	-%	-%	-%	53%	58%	-%	-%	-%	-%	60%	50%	64%	48%
		-%	-%	100%	-%	-%	-%	-%	76%	24%	-%	-%	-%	-%	47%	53%	64%	34%
Call management functionality	61	-	-	61	-	-	-	-	50	12	-	-	-	-	25	36	31	28
	44%	-%	-%	44%	-%	-%	-%	-%	45%	39%	-%	-%	-%	-%	42%	45%	41%	51%
		-%	-%	100%	-%	-%	-%	-%	81%	19%	-%	-%	-%	-%	41%	59%	51%	45%
Flexible line capacity	54	-	-	54	-	-	-	-	43	11	-	-	-	-	23	32	31	21
	39%	-%	-%	39%	-%	-%	-%	-%	39%	35%	-%	-%	-%	-%	38%	39%	41%	40%
		-%	-%	100%	-%	-%	-%	-%	80%	20%	-%	-%	-%	-%	42%	58%	58%	39%
Voice connectivity	54	-	-	54	-	-	-	-	41	14	-	-	-	-	25	29	26	27
	39%	-%	-%	39%	-%	-%	-%	-%	37%	44%	-%	-%	-%	-%	42%	36%	35%	50%
		-%	-%	100%	-%	-%	-%	-%	75%	25%	-%	-%	-%	-%	47%	53%	49%	49%
Data connectivity	47	-	-	47	-	-	-	-	33	14	-	-	-	-	20	27	19	27
	34%	-%	-%	34%	-%	-%	-%	-%	30%	45%	-%	-%	-%	-%	34%	33%	26%	49%
		-%	-%	100%	-%	-%	-%	-%	71%	29%	-%	-%	-%	-%	43%	57%	41%	56%
Provides voice & data communications via the same service	40	-	-	40	-	-	-	-	34	6	-	-	-	-	10	30	17	20
	28%	-%	-%	28%	-%	-%	-%	-%	31%	20%	-%	-%	-%	-%	16%	37%	22%	37%
		-%	-%	100%	-%	-%	-%	-%	85%	15%	-%	-%	-%	-%	24%	76%	42%	50%
LAN connectivity	37	-	-	37	-	-	-	-	32	5	-	-	-	-	15	22	17	18
	26%	-%	-%	26%	-%	-%	-%	-%	29%	15%	-%	-%	-%	-%	24%	27%	23%	33%
		-%	-%	100%	-%	-%	-%	-%	87%	13%	-%	-%	-%	-%	40%	60%	47%	48%
Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q																		

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 95

E9. Overall, what do you regard as the main functional value(s) of IP-based services for your organisation? (MULTI CODE)

Base : Those who use IP-based alternatives and do not mostly use an ISDN service

	Total	MOSTLY USED			PRIMARY SERVICE						SWITCH INSTALLED		SWITCH IP-ENABLED		TRADING FOR UNDER		SPEND ON COMMS UNDER	
		ISDN2	ISDN30	IP	ISDN2 PRIMARY	ISDN2 NOT PRIMARY	ISDN30 PRIMARY	ISDN30 NOT PRIMARY	IP PRIMARY	IP NOT PRIMARY	YES	NO/DK	YES	NO/DK	10 YEARS	10+ YEARS	£100K	£100K+
		*a	*b	c	*d	*e	*f	*g	h	i	*j	*k	*l	*m	n	o	p	q
Significance Level: 95%																		
Unweighted total	133	-	-	133	-	-	-	-	102	31	-	-	-	-	52	81	65	57
Effective Weighted Sample	125	-	-	125	-	-	-	-	97	28	-	-	-	-	50	75	62	53
Total	141	-	-	141	-	-	-	-	110	31	-	-	-	-	60	81	76	54
		-%	-%	100%	-%	-%	-%	-%	78%	22%	-%	-%	-%	-%	42%	58%	54%	38%
Requires little post purchase support	33	-	-	33	-	-	-	-	26	8	-	-	-	-	12	21	17	15
	24%	-%	-%	24%	-%	-%	-%	-%	23%	26%	-%	-%	-%	-%	20%	26%	23%	27%
		-%	-%	100%	-%	-%	-%	-%	76%	24%	-%	-%	-%	-%	36%	64%	52%	44%
Unified communications capability	17	-	-	17	-	-	-	-	16	1	-	-	-	-	5	12	5	8
	12%	-%	-%	12%	-%	-%	-%	-%	15%	3%	-%	-%	-%	-%	9%	15%	7%	15%
		-%	-%	100%	-%	-%	-%	-%	94%	6%	-%	-%	-%	-%	31%	69%	30%	48%
LAN connectivity	15	-	-	15	-	-	-	-	14	1	-	-	-	-	4	12	7	6
	11%	-%	-%	11%	-%	-%	-%	-%	13%	5%	-%	-%	-%	-%	7%	14%	10%	11%
		-%	-%	100%	-%	-%	-%	-%	91%	9%	-%	-%	-%	-%	26%	74%	47%	40%
CTI capability	11	-	-	11	-	-	-	-	11	*	-	-	-	-	3	8	4	7
	8%	-%	-%	8%	-%	-%	-%	-%	10%	1%	-%	-%	-%	-%	5%	10%	5%	13%
		-%	-%	100%	-%	-%	-%	-%	96%	4%	-%	-%	-%	-%	27%	73%	36%	64%

Columns Tested: a,b,c - d,e,f,g,h,i - j,k - l,m - n,o - p,q



# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 95

E9. Overall, what do you regard as the main functional value(s) of IP-based services for your organisation? (MULTI CODE)

Base : Those who use IP-based alternatives and do not mostly use an ISDN service

		SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT		
		Total	LAST YEAR	EVER	NEVER /DK	YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
Significance Level: 95%	*a	*b	*c	*d	*e	*f	*g	*h	*i	*j	*k	l	m	n	o	p	q	r		
Unweighted total	133	-	-	-	-	-	-	-	-	-	-	-	44	96	47	48	77	94	39	
Effective Weighted Sample	125	-	-	-	-	-	-	-	-	-	-	-	41	90	45	47	72	88	37	
Total	141	-	-	-	-	-	-	-	-	-	-	-	44	102	47	55	79	98	43	
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	32%	72%	34%	39%	56%	69%	31%	
Reliable	83	-	-	-	-	-	-	-	-	-	-	-	25	63	25	33	48	60	23	
	59%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	57%	62%	53%	60%	60%	62%	53%	
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	30%	76%	30%	40%	57%	72%	28%	
Easy to use	76	-	-	-	-	-	-	-	-	-	-	-	22	57	25	28	48	52	25	
	54%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	50%	56%	53%	50%	61%	53%	57%	
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	29%	74%	33%	37%	63%	68%	32%	
Call management functionality	61	-	-	-	-	-	-	-	-	-	-	-	22	55	20	25	35	47	14	
	44%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	50%	54%	43%	45%	45%	48%	33%	
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	36%	89%	33%	41%	58%	76%	24%	
Flexible line capacity	54	-	-	-	-	-	-	-	-	-	-	-	14	42	23	21	32	37	17	
	39%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	32%	41%	48%	38%	40%	38%	40%	
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	26%	77%	42%	39%	59%	68%	32%	
Voice connectivity	54	-	-	-	-	-	-	-	-	-	-	-	21	45	18	21	33	39	16	
	39%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	48%	45%	39%	37%	42%	40%	36%	
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	39%	84%	34%	38%	61%	71%	29%	
Data connectivity	47	-	-	-	-	-	-	-	-	-	-	-	19	38	14	16	30	38	9	
	34%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	43%	37%	30%	28%	38%	39%	21%	
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	40%	80%	30%	33%	64%	80%	20%	
Provides voice & data communications via the same service	40	-	-	-	-	-	-	-	-	-	-	-	13	36	12	15	24	29	11	
	28%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	29%	35%	25%	28%	30%	30%	25%	
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	32%	89%	29%	39%	59%	73%	27%	
LAN connectivity	37	-	-	-	-	-	-	-	-	-	-	-	15	28	11	12	24	30	7	
	26%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	33%	28%	24%	21%	30%	31%	15%	
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	40%	76%	31%	32%	65%	82%	18%	
Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r																				

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r

# NARROWBAND MARKET REVIEW 2017 - BUSINESS USERS OF ISDN AND IP ALTERNATIVES

Table 95

E9. Overall, what do you regard as the main functional value(s) of IP-based services for your organisation? (MULTI CODE)

Base : Those who use IP-based alternatives and do not mostly use an ISDN service

	Total	SWITCHING ISDN SUPPLIER			CONSIDERING SWITCHING AWAY FROM ISDN		AWARE OF IP ALTERNATIVES		HOW LONG ENVISAGE USING ISDN		CONSIDERED MAKING CHANGES TO ISDN		IP SERVICES USED			HOW LONG USED IP SERVICES		IP REQUIRED INVESTMENT	
		NEVER			YES	NO	YES	NO/DK	UP TO 3 YEARS	4+ YEARS	YES	NO/DK	SIP TRUNKING	HOSTED VOIP	IP CENTREX	UP TO 2 YEARS	OVER 2 YEARS	YES	NO/DK
		LAST YEAR	EVER	/DK															
Significance Level: 95%		*a	*b	*c	*d	*e	*f	*g	*h	*i	*j	*k	l	m	n	o	p	q	r
Unweighted total	133	-	-	-	-	-	-	-	-	-	-	-	44	96	47	48	77	94	39
Effective Weighted Sample	125	-	-	-	-	-	-	-	-	-	-	-	41	90	45	47	72	88	37
Total	141	-	-	-	-	-	-	-	-	-	-	-	44	102	47	55	79	98	43
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	32%	72%	34%	39%	56%	69%	31%
Requires little post purchase support	33	-	-	-	-	-	-	-	-	-	-	-	15	26	13	12	20	26	8
	24%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	33%	26%	27%	22%	25%	26%	18%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	44%	79%	38%	37%	60%	76%	24%
Unified communications capability	17	-	-	-	-	-	-	-	-	-	-	-	7	12	3	7	7	12	5
	12%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	15%	11%	6%	12%	9%	12%	12%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	39%	68%	15%	39%	41%	69%	31%
LAN connectivity	15	-	-	-	-	-	-	-	-	-	-	-	7	12	4	4	12	14	1
	11%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	16%	12%	9%	7%	15%	14%	3%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	46%	80%	27%	25%	75%	91%	9%
CTI capability	11	-	-	-	-	-	-	-	-	-	-	-	4	10	8	4	7	9	2
	8%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	9%	10%	17%	6%	9%	10%	4%
		-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	-%	36%	91%	75%	33%	67%	84%	16%

Columns Tested: a,b,c - d,e - f,g - h,i - j,k - l,m,n - o,p - q,r