



CONVERGED COMMUNICATIONS  
COMPETITIVE INTELLIGENCE

## Market reports

# AUSTRALIAN BUSINESS FIXED LINE USAGE AND DIRECTIONS, 2008 END-USER SURVEY

**August 2008**

The Australian business telecommunications market remains in an ever-changing state as businesses continue to migrate from old-generation, legacy technology-based voice and data systems to next-generation, IP-based systems.

Produced annually as the flagship report in Telsyte's Business Decision Maker Series, this study offers a detailed investigation and comprehensive analysis of fixed-line voice and data services usage, preferences and adoption trends among Australian businesses by providing:

- A snapshot of the Australian business fixed-line market, including PSTN, broadband and data services penetration and user number;
- Business fixed-line voice and data decision-making process, including the roles of influencers and use of external consultants;
- Preferences for fixed-line voice and data service providers along with user perceptions of "green telecom", selection criteria, churn intention, and end-user perceptions of those suppliers;
- Current and planned adoptions of enterprise applications (such as web-based conferencing, streaming audio/video, and e-learning) and voice and data technology (such as VoIP, various broadband access technologies, Ethernet and IP MPLS/VPN) as well as adoption drivers and inhibitors; and
- Conclusion and recommendations.

Published simultaneously with this study are two other Market Analysis and Forecast Series reports, namely:

- *Australian Business Mobile Usage and Directions, 2008 End User Survey* (Publication Number: 80487); and
- *Australian Enterprise Communications Usage and Directions, 2008 End User Survey* (Publication Number: 80488).

**Australian Business Fixed Line Usage and Directions, 2008 End User Survey** is a 34-page report costing \$2,995 (excluding GST) and includes 23 Figures and 4 Tables.

## Table of Contents

Section	Description	Page
1	INTRODUCTION	5
1.1	Methodology	5
1.2	Definitions	7
2	EXECUTIVE SUMMARY	9
3	BUSINESS FIXED LINE MARKET AND DECISION-MAKING PROCESS	11
3.1	2008 Australian Business Fixed-Line Market	11
3.1	Most Effective Sales and Marketing Techniques	11
3.2	Use of External Consultants	12
3.3	"Green IT"	13
4	CORPORATE INTERNET SERVICES	15
4.1	Business Broadband Penetration	15
4.2	Preferred Business Internet Service Providers	17
4.3	Business Internet Churn	17
4.4	Broadband Service Provider Perceptions	19
5	DATA SERVICES	21
5.1	Business Data Services Penetration and IP Migration	21
5.1.1	Half of all businesses have deployed data services	21
5.1.2	Move to all-IP networks to strengthen in the next 2 years	22
5.2	Preferred Data Service Providers	24
5.3	Business Data Services Churn	25
5.4	Data Service Provider Perceptions	26
6	BROADBAND APPLICATIONS	28
6.1	E-commerce Applications	28
6.2	Collaborative Applications	29
7	VOICE OVER IP	30
7.1	Business VoIP Penetration	30
7.2	Over Half of Business Using Skype or Another Broadband-based VoIP Service	30
7.3	Barriers to Business VoIP Deployment	31
8	CONCLUSION AND RECOMMENDATIONS	33
9	RELATED RESEARCH	34

## Figures

Figure	Page
Figure 1 — Australian Business Fixed-Line Market, 2008	11
Figure 2 — Marketing Techniques' Level of Influence on Fixed Line Service Selection and Purchase, 2008	11

Figure 3 — Choice of External Consultants in Deployment of Fixed-Line Projects, 2008	13
Figure 4 — Importance of “Greenness” in Fixed Line Service Provider Selection, 2008	13
Figure 5 — Business Internet Penetration by Speed by Business Size, 2008	15
Figure 6 — Business Internet Penetration by Access Technology by Business Size, 2008	15
Figure 7 — Business Broadband Primary Service Provider, 2008	17
Figure 8 — Intention to Continue with the Current Internet Service Provider, 2008	18
Figure 9 — Most Important Factor in Internet Service Provider Selection, 2008	18
Figure 10 — Australian Business Perception of Broadband Service Providers, 2008	19
Figure 11 — Business Data Services Penetration by Business Size, 2008	21
Figure 12 — Business Data Services Penetration by Technology by Business Size, 2008	22
Figure 13 — Planned Migration to All-IP Network, 2008	23
Figure 14 — IP Migration Inhibitors, 2007	24
Figure 15 — Business Data Services Primary Service Provider, 2008	24
Figure 16 — Intention to Continue with the Current Internet Service Provider, 2008	25
Figure 17 — Most Important Factor in Data Services Provider Selection, 2008	26
Figure 18 — Australian Business Perception of Data Services Providers, 2007	26
Figure 19 — Use of e-commerce Applications by Business Size and Transaction Type, 2008	28
Figure 20 — Use of Business Online Applications, 2008	29
Figure 21 — Business VoIP Penetration by Business Size, 2008	30
Figure 22 — Business VoIP Service Deployment Model by Business Size, 2008	31
Figure 23 — Business VoIP Inhibitors, 2008	32

## Tables

Table	Page
Table 1 – Distribution of Telsyte's 2008 Survey Respondents by Business Size	6
Table 2 – Distribution of Telsyte's 2008 Survey Respondents by Vertical Industry	6
Table 3 – Distribution of Telsyte's 2008 Survey Respondents by Job Role	6
Table 4 – Distribution of Telsyte's 2008 Survey Respondents by Geographical Location	7

## Report Pricing

All reports are delivered in password protected Adobe PDF format. Reports are Print and Search enabled.

Reports will be licensed to the subscribing company.

The subscriber will not be permitted to disclose the report or its contents to any additional third parties, and must ensure that any person within the subscriber company's organisation who has access to the content of this report abides by the requirements of this Confidentiality undertaking.

Report Description	Report Cost	GST	Total
<b>Australian Business Fixed Line Usage and Directions, 2008 End User Survey</b>	\$2,995.00	\$299.50	\$3,294.50

### How to order

#### Purchase PDF-based report online

On [Market Reports](#) page, browse to **Australian Business Fixed Line Usage and Directions, 2008 End User Survey** report and click on "Purchase Now"

**Fax** the form to Telsyte at (02) 8297-4633 (International: +61-2-8297-4633) or

**Call** (02) 8297-4650 (Please have you credit card details ready) or

**Email** your order to: [info@telsyte.com.au](mailto:info@telsyte.com.au) (include all information on the order form below):

**Mr Mrs Ms:** \_\_\_\_\_  
**First Name** \_\_\_\_\_  
**Surname:** \_\_\_\_\_  
**Position:** \_\_\_\_\_  
**Company:** \_\_\_\_\_  
**Postal Address:** \_\_\_\_\_  
\_\_\_\_\_  
**Postcode:** \_\_\_\_\_  
**Phone:** \_\_\_\_\_  
**Email Address:** \_\_\_\_\_

#### Payment Options:

- Cheque - Enclosed is a cheque for \$\_\_\_\_\_ (Cheques payable to: Gibson Quai - AAS Pty Ltd [Telsyte is a business unit of GQ - AAS])
- Please invoice my company (I understand that the report will be sent after the invoice is paid in full)

Please charge the following credit card:

- Visa
- Bankcard
- Mastercard
- American Express

**Card Number:** \_\_\_\_\_

**Expiry Date:** \_\_\_\_\_

**Signature:** \_\_\_\_\_