


Connectors

Connectors are typically smaller sized businesses that are distinguished by being multi-sited. Their business growth is primarily dependent on people, rather than IT. However, IT is important in connecting their people both on site and when on the move. They have large communications budgets due to a need to connect multiple sites and anticipate increased spend to underpin their growing needs in the near-term.

Estimated  **1.1m companies**
(21% of UK businesses)

 **Market value**
c.£16.5bn
(voice calls, line rental and data access services)

 **£15k**
per year
Average spend on voice calls, line rental and data access services.

Physical profile

- Typically 2-49 employees, though some are larger
- Can range from single site business, up to nine multi-site organisation
- Majority of firms are B2B focussed but there is no significant industry bias.

Connectivity profile

- Broadband is the mainstay of their business with highest fibre broadband ownership (47% – at least one site) of smaller sized segments
- Data circuit ownership is moderate (31%) with bandwidth requirements rarely exceeding 100Mbps even at key sites
- Use of hosted apps (e.g. Dropbox) is growing despite viewing themselves as IT laggards.

What's on their minds?

Connectivity

- Most (66%) seek to keep IT costs to a minimum but acknowledge that data consumption is growing
- High interest in fibre broadband as download and upload speeds meet their needs at majority of sites
- Full availability of cost-effective fibre broadband across premise estate.

Service needs

- Service needs focused on fast fault repair with most seriously disrupted (61%) if service was lost for at least half a day
- Very high interest in faster fault fix (e.g. six hour response) and more akin to larger more IT-dependent firms.

Future service and connectivity needs

- Increased download and in particular upload speeds beyond those currently offered via fibre broadband – driven by increased use of cloud applications and website based transactions
- Ethernet services to provide reliable connections to the most strategic locations – offering higher bandwidth and greater resilience.

Recommended products and services

Connections and bandwidth

Growing need to upgrade from ADSL to fibre broadband to improve productivity of and experience for employees

Fibre broadband offering speeds above 80/20 to support growing data needs

Emerging need for Ethernet (100Mbps) circuits to connect strategic sites given data growth and provide highly reliable connection

Coming soon: Business FTTP, offering a range of speeds, up to 1Gbps.

Exceeding expectations

Swift and certain repair to address outage anxiety: Harmonised Repair (6, 12 and 24 hour fix times).

Source: Research conducted in April 2015. This document is part of our business market segmentation suite of materials. You can discover the full range on our Customer Information Zone at CIZ-openreach.co.uk