SME Telecommunications Services Study 2003

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- Summary Of Findings

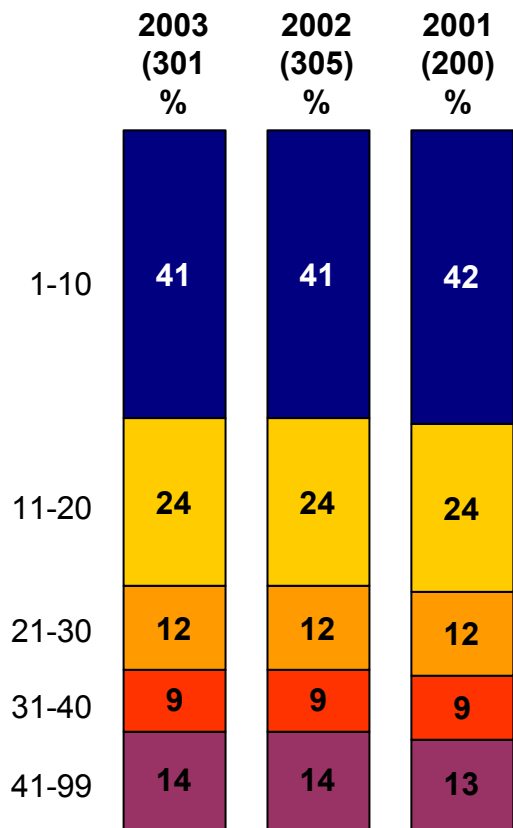- Charted Findings

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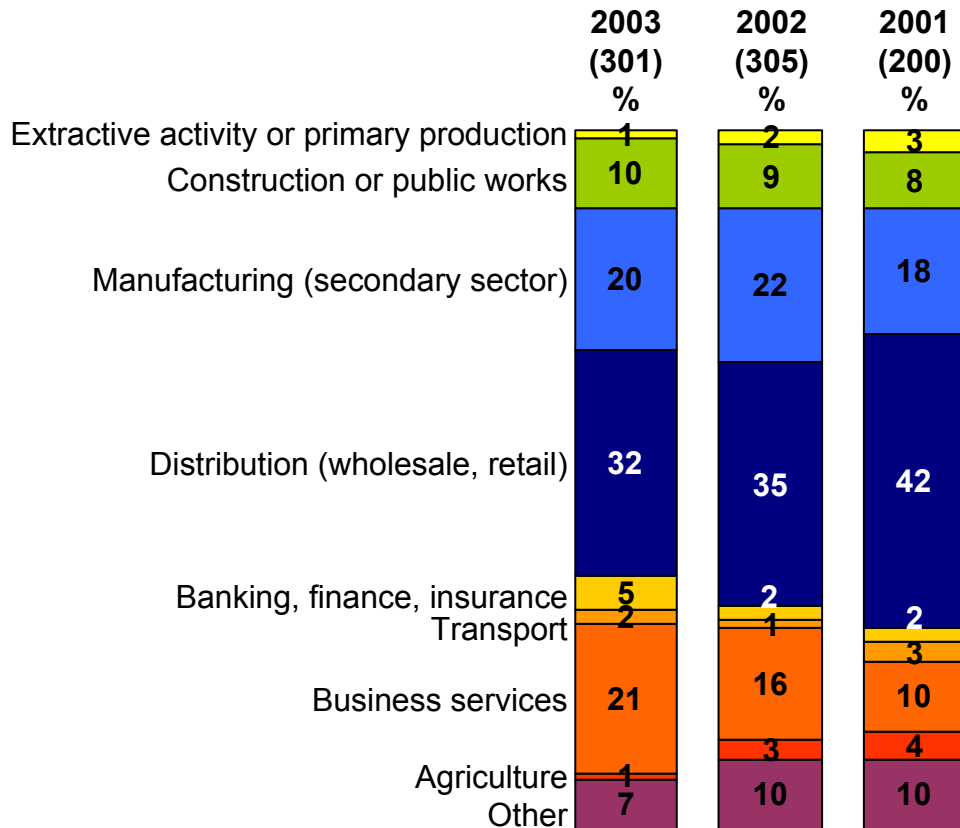# Introduction

Introduction

- A telecommunications survey is conducted annually, on behalf of the Commission for Communications Regulation (ComReg), amongst a nationally representative sample of small and medium sized companies (SME's) in the Republic of Ireland.

- The survey measures SME sector usage and attitude trends in the areas of fixed telephone services, mobile telephone services and the Internet.

- This summary report reviews the findings of the 2003 survey, conducted by TNS mrbi.

- 305 CATI (Computer Assisted Telephone) interviews were conducted with the person responsible in SME's for telecommunications decision making, between 22nd October – 11th November, 2003.

- Quotas were set on company size/number of employees.

- The same questionnaire was used as in 2002, with some additional questions on DSL (Digital Subscriber Lines).

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Charted Findings

Company Profile - I
Base: All Respondents: 301

No. Of Employees In Ireland

	2003 (301) %	2002 (305) %	2001 (200) %
1-10	41	41	42
11-20	24	24	24
21-30	12	12	12
31-40	9	9	9
41-99	14	14	13

Industry Sector

	2003 (301) %	2002 (305) %	2001 (200) %
Extractive activity or primary production	1	2	3
Construction or public works	10	9	8
Manufacturing (secondary sector)	20	22	18
Distribution (wholesale, retail)	32	35	42
Banking, finance, insurance	5	2	2
Transport	2	1	3
Business services	21	16	10
Agriculture	1	3	4
Other	7	10	10

Company Profile – II
Base: All Respondents: 301
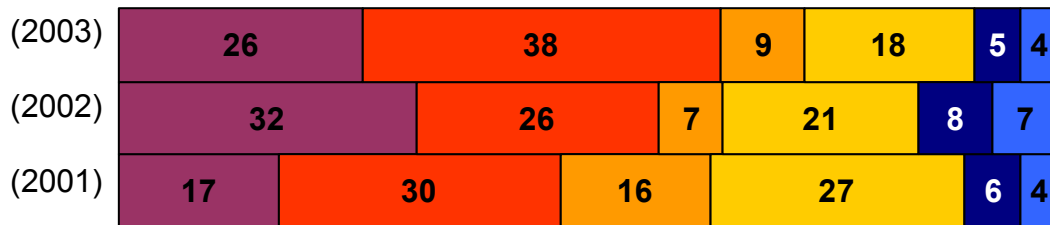
Amount Spent On Telecommunications
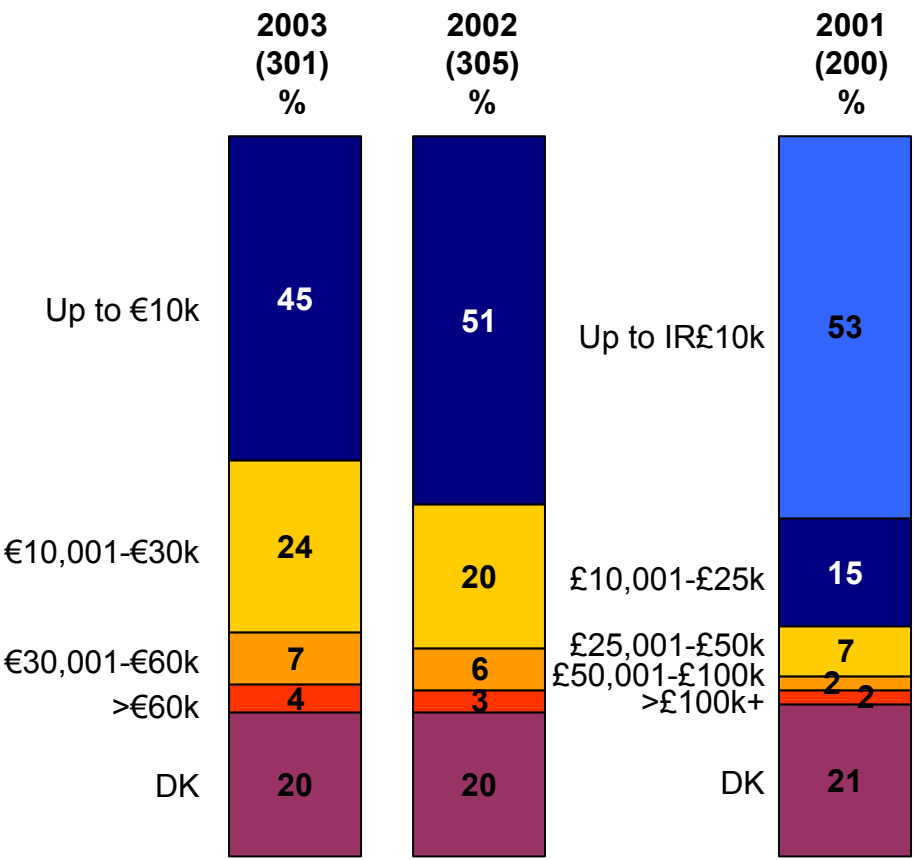
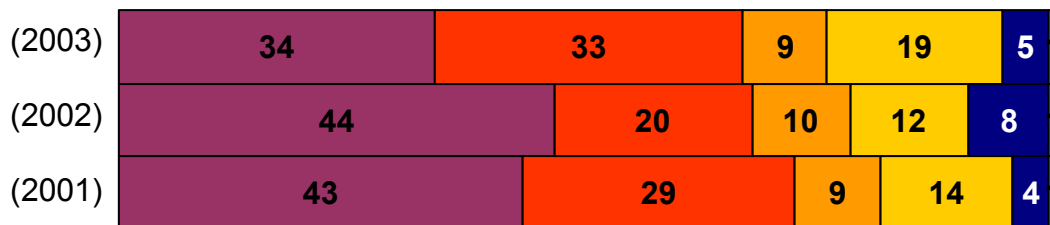**Proportion Of Company's Total Costs**
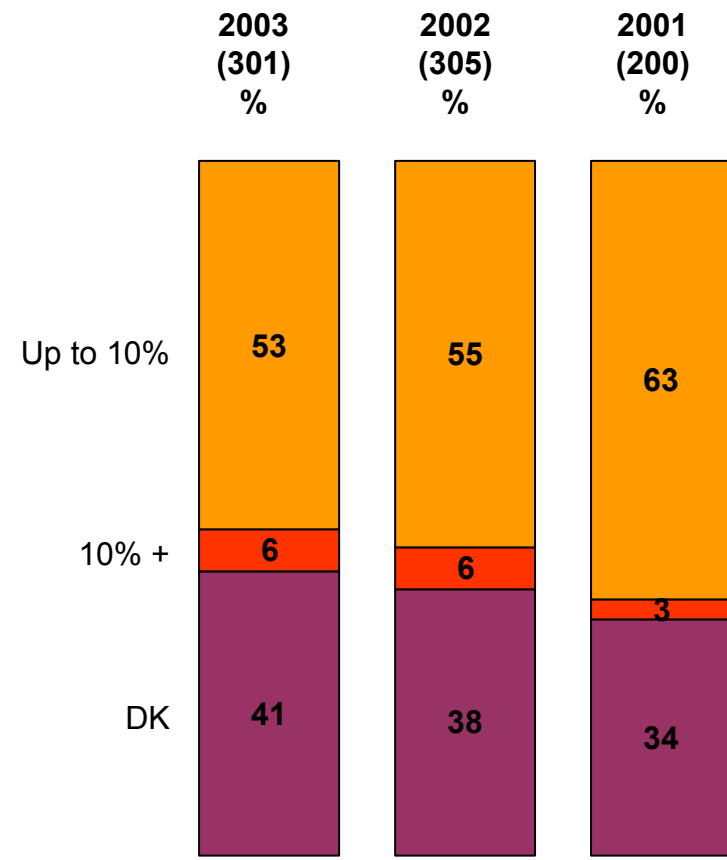
General Attitudes To Telecommunications
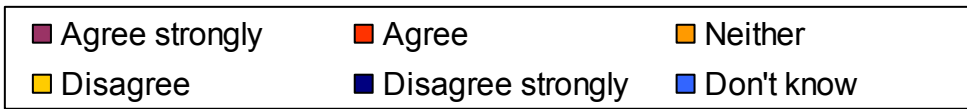## Base: All Respondents; 2003 (301); 2002 (305); 2001 (200)

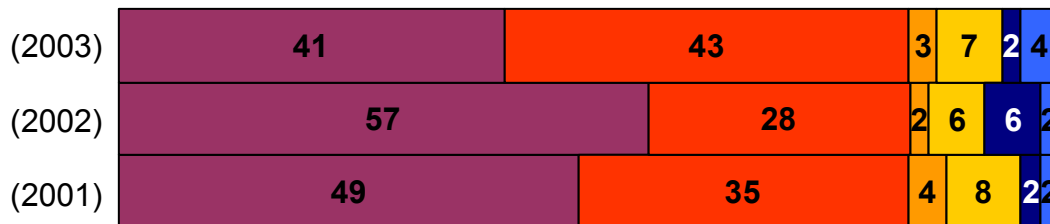**I believe there are savings to be gained by changing my telecommunications supplier**

Year	Agree strongly	Agree	Neither	Disagree	Disagree strongly	Don't know
(2003)	26	38	9	18	5	4
(2002)	32	26	7	21	8	7
(2001)	17	30	16	27	6	4

When choosing a telecommunications supplier, I place more importance on the quality of service than the price

Year	Agree strongly	Agree	Neither	Disagree	Disagree strongly	Don't know
(2003)	34	33	9	19	5	1
(2002)	44	20	10	12	8	1
(2001)	43	29	9	14	4	1

I believe the telecommunications market is more competitive than it was 12 months ago

Year	Agree strongly	Agree	Neither	Disagree	Disagree strongly	Don't know
(2003)	41	43	3	7	2	4
(2002)	57	28	2	6	6	2
(2001)	49	35	4	8	2	2

Legend: Agree strongly · Agree · Neither · Disagree · Disagree strongly · Don't know
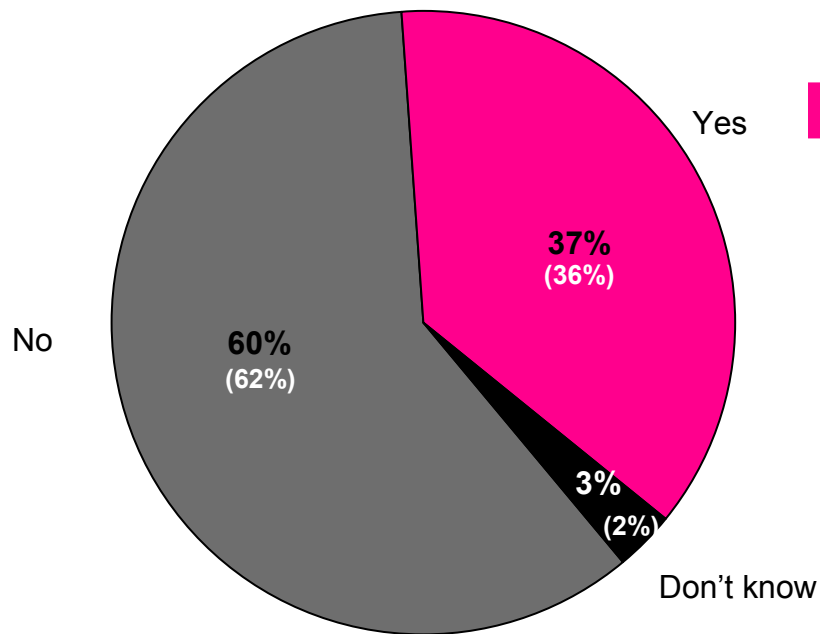
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Telecommunication Costs In The Past Year
Base: All Respondents: 301
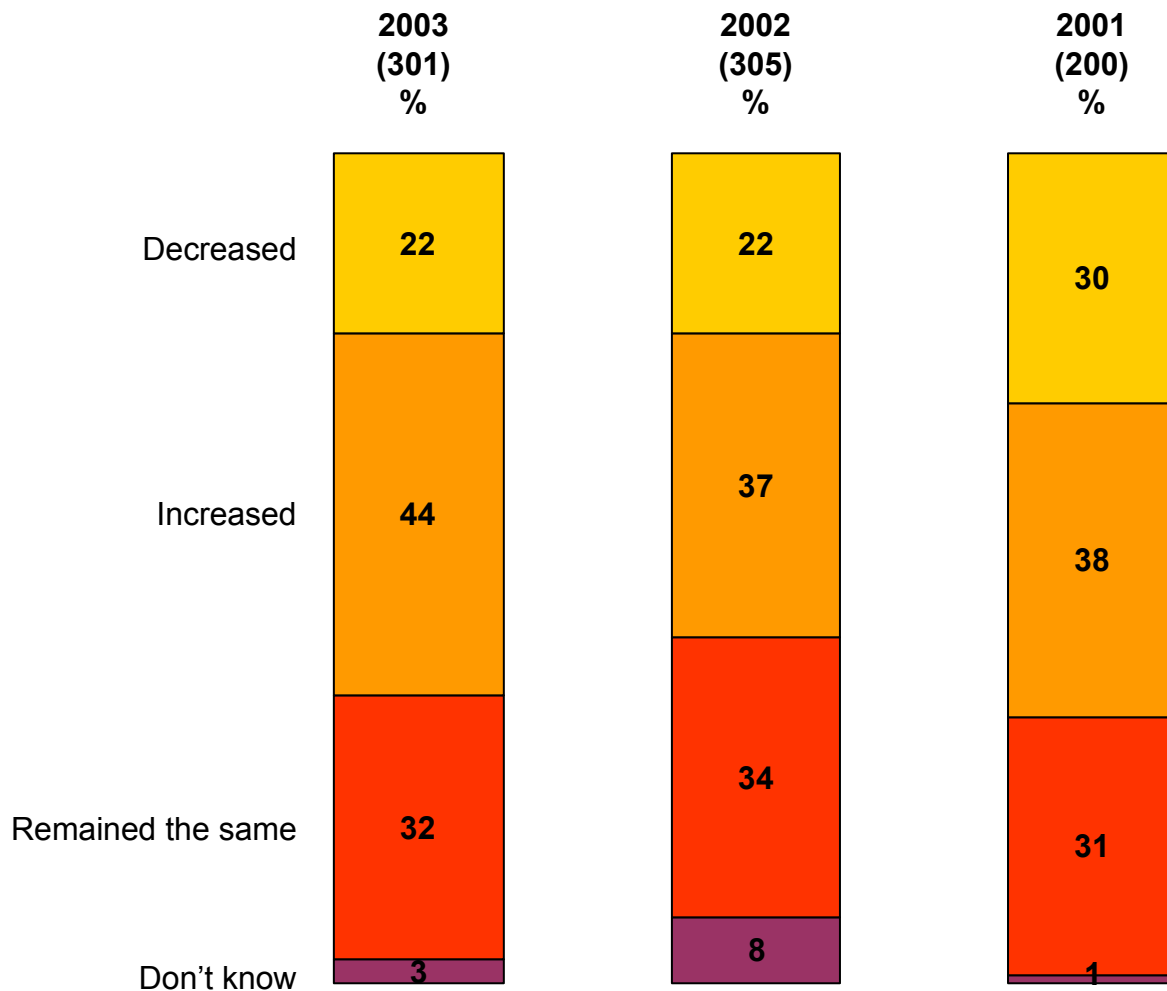
Whether Intend To Invest More Or Less In Telecommunications Or E-Commerce In Coming 12 Months

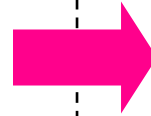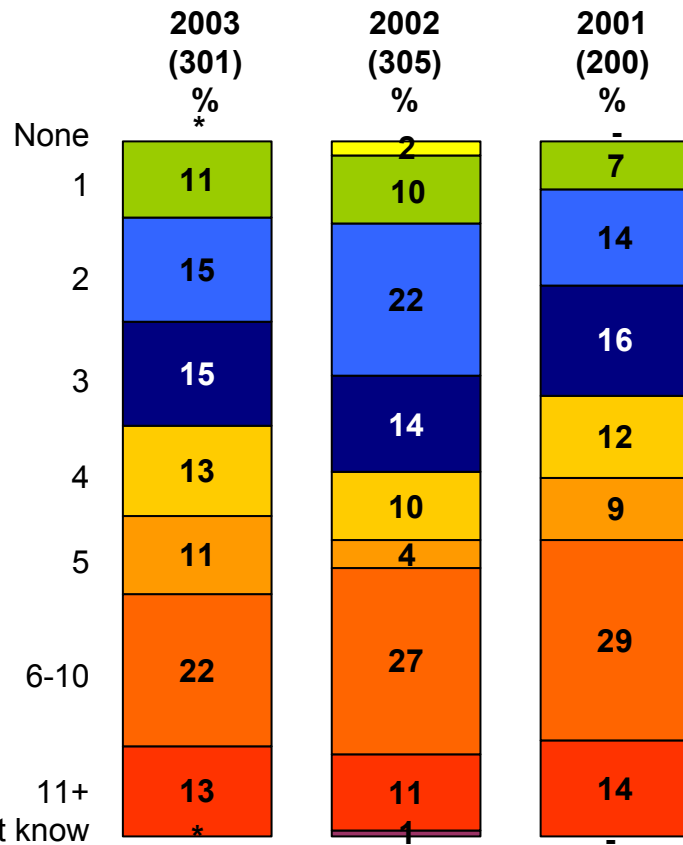## Base: All Respondents: 301

Services Likely To Invest In

Base:	(112) %	(2002 = 109
Internet/web development	62	(70)
More computers/hardware	61	(61)
New phones system/ upgrading existing system	37	(47)
Mobile telephony	34	(37)
Fixed ISDN telephone line	25	(35)
Leased line(s)	13	(22)
DSL (Digital Subscriber Line)	46	(18)
Other	6	(2)
Don't know	4	(4)

() = 2002 figures

Use Of Telecommunication Devices Or Services

Number Of Telecommunication Devices Or Services Owned – Fixed Traditional

Fixed Traditional Telephone Lines

	2003 (301) %	2002 (305) %	2001 (200) %
None	*	2	-
1	11	10	7
2	15	22	14
3	15	14	16
4	13	10	12
5	11	4	9
6-10	22	27	29
11+	13	11	14
Don't know	*	1	-

Number Of Extensions

	2003 (300) %	2002 (298) %	2001 (200) %
None	15	17	11
1	4	9	5
2	3	9	8
3	10	6	6
4	7	7	4
5	7	7	6
		5	
6-10	24	17	29
11+	30	31	31
Don't know	1	1	-

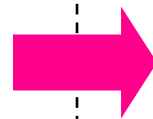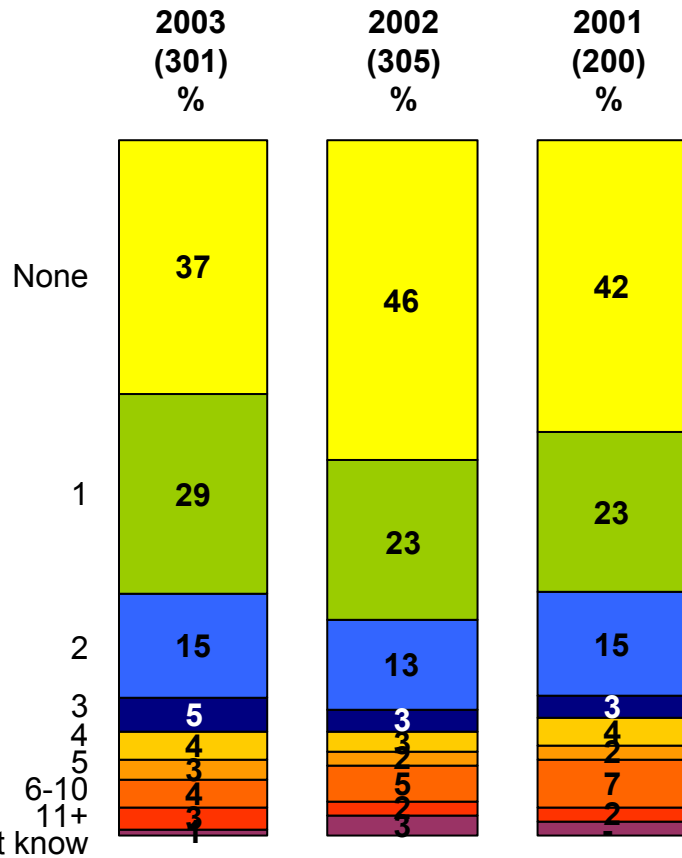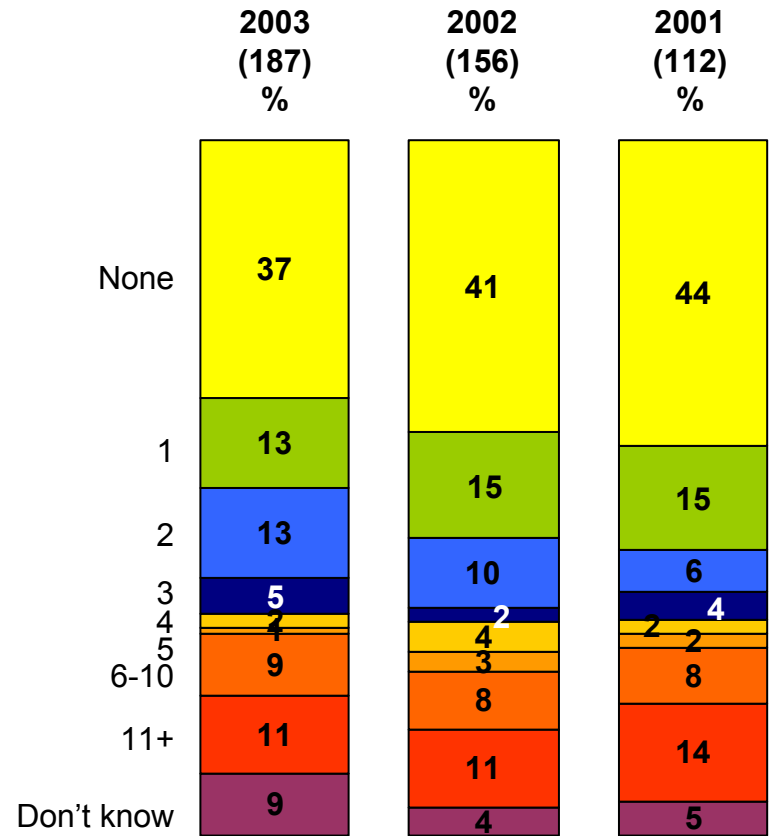tns mrbi
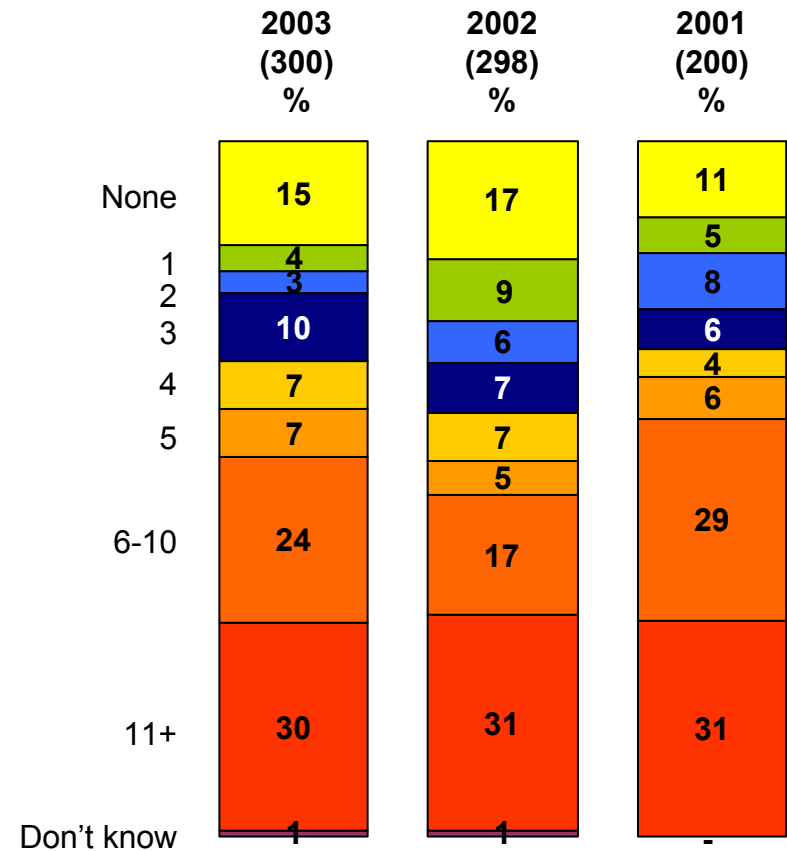
Number Of Telecommunication Devices Or Services Owned – Fixed ISDN
Base: All Respondents: 301

Fixed ISDN Telephone Lines

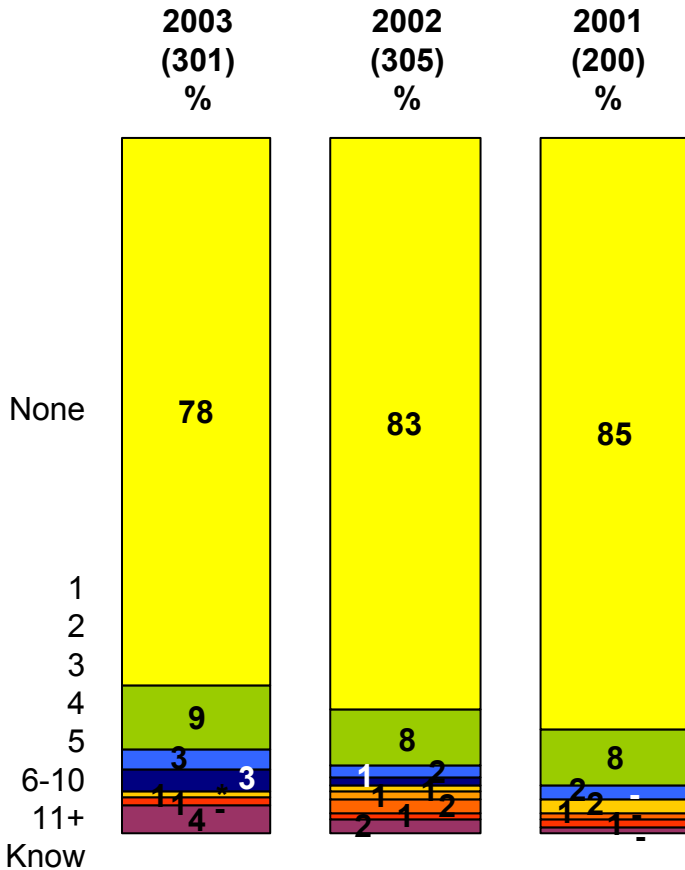|	2003 (301) %	2002 (305) %	2001 (200) %
None	37	46	42
1	29	23	23
2	15	13	15
3	5	3	3
4	4	3	4
5	3	2	2
6-10	4	5	7
11+	3	3	2
Don't know	1	3	-

Number Of Extensions

	2003 (187) %	2002 (156) %	2001 (112) %
None	37	41	44
1	13	15	15
2	13	10	6
3	5	2	4
4	4	4	2
5	2	3	2
6-10	9	8	8
11+	11	11	14
Don't know	9	4	5

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Number Of Telecommunication Devices Or Services Owned – Leased Lines

Leased Lines

	2003 (301) %	2002 (305) %	2001 (200) %
None	78	83	85
4-5	9	8	8
5	3	3	
6-10	3	1 2	2
11+	1 1 4	1 1 2	1 2 1
Don't Know		2	

Leased Line Bandwidth

	2003 (53) %	2002 (45) %	2001 (28) %
Analogue	19	18	35
Equivalent 62 kbit/s (64k-2 Mbit/s)	25	22	
Equivalent 2 Mbit/s (>= 2 Mbit/s, <34 Mbits)	17	7	29
Equivalent 34 Mbit/s (>= 34 Mbit/s, <140 Mbits)	6	13	7 4
Don't know	36	51	25

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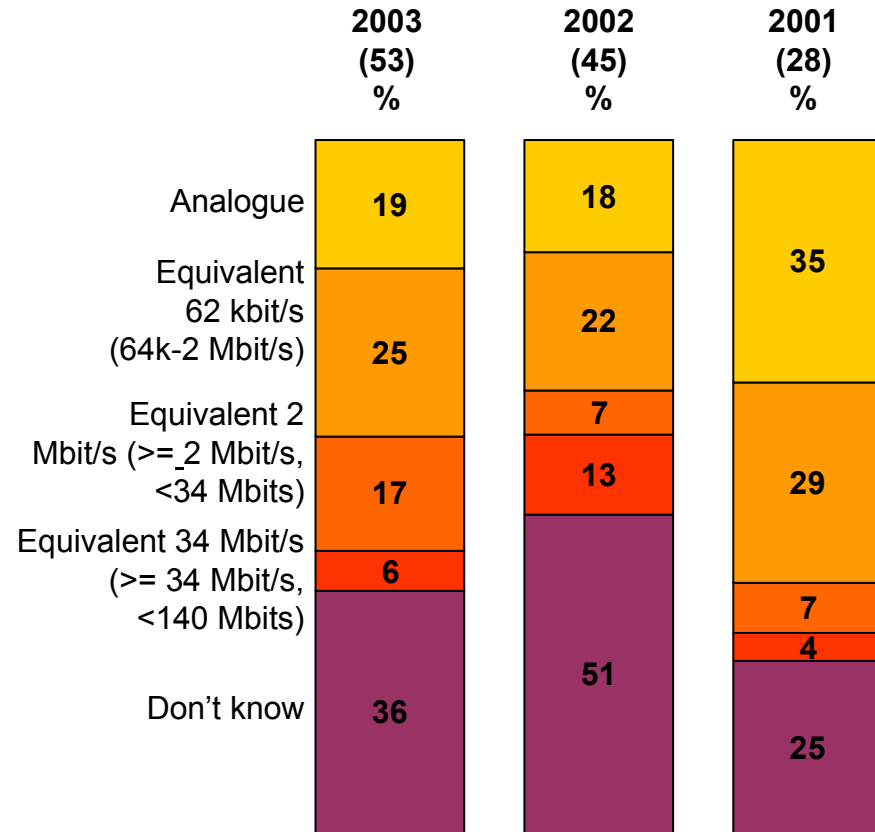
Number Of Telecommunication Devices Or Services Owned – Mobiles
Base: All Respondents: 301

Mobile Phones

	2003 (301) %	2002 (305) %	2001 (200) %
None	16	17	11
1	13	11	11
2	13	17	17
3	10	12	12
4	8	8	10
5	5	4	8
6-10	24	17	20
11+	11	12	11
Don't Know	-	1	-
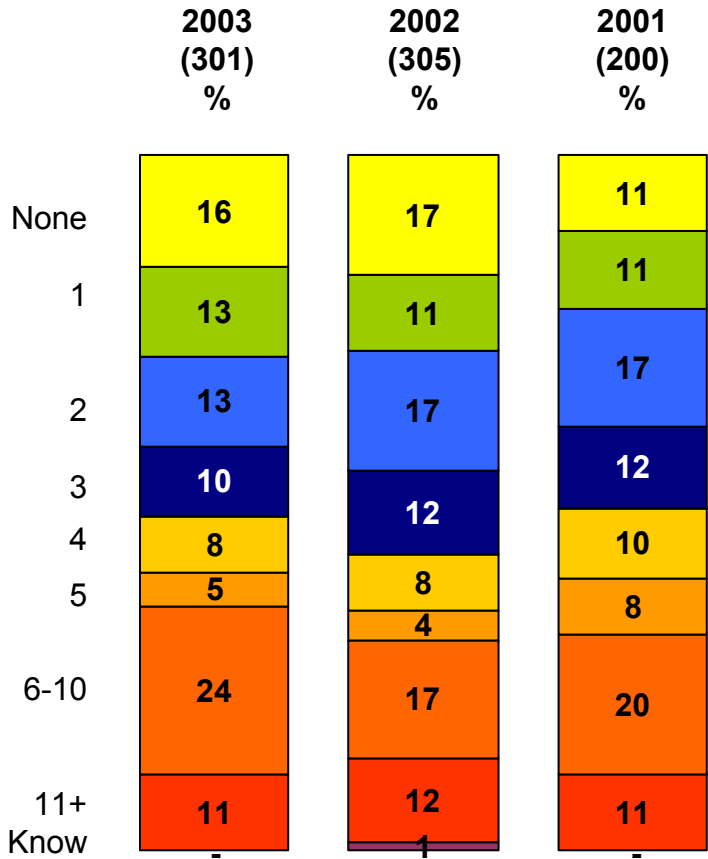
Used By How Many Employees

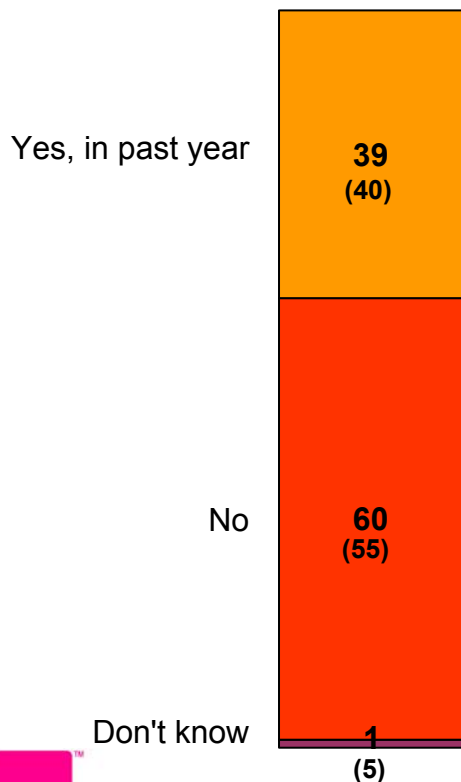|	2003 (252) %	2002 (249) %	2001 (178) %
None	-	1	6
1	15	13	13
2	17	20	16
3	11	14	12
4	10	10	12
5	6	6	8
6-10	28	20	21
11+	13	15	12
Don't know	*		

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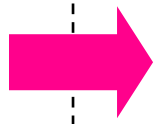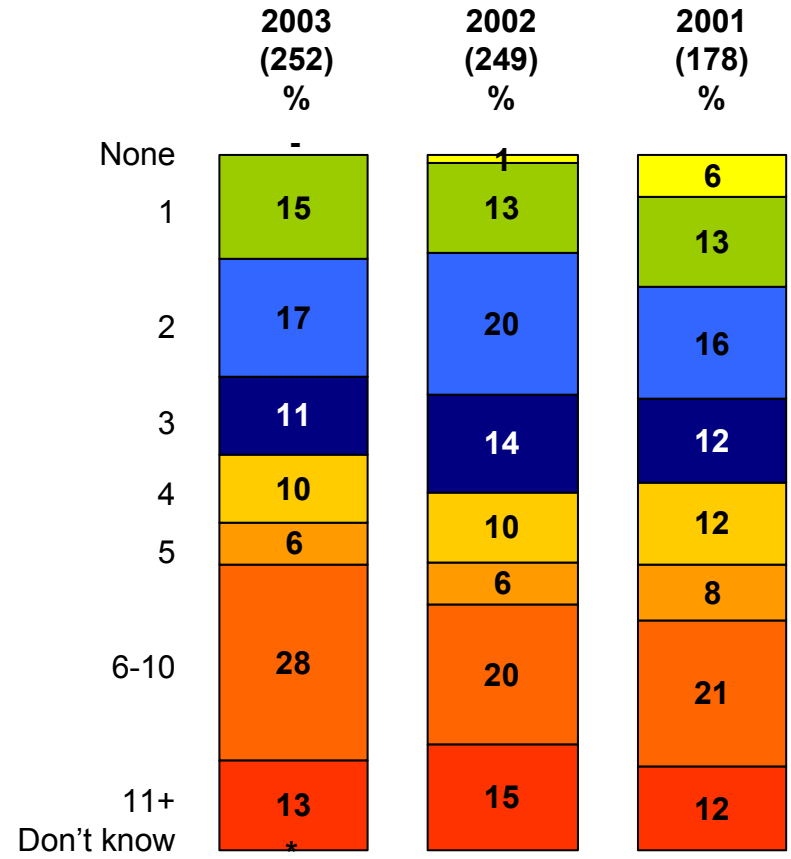
Installation/Purchase Of Telecommunication Devices Or Services In The Past 12 Months
Base: All With Devices Or Services

Fixed ISDN Lines
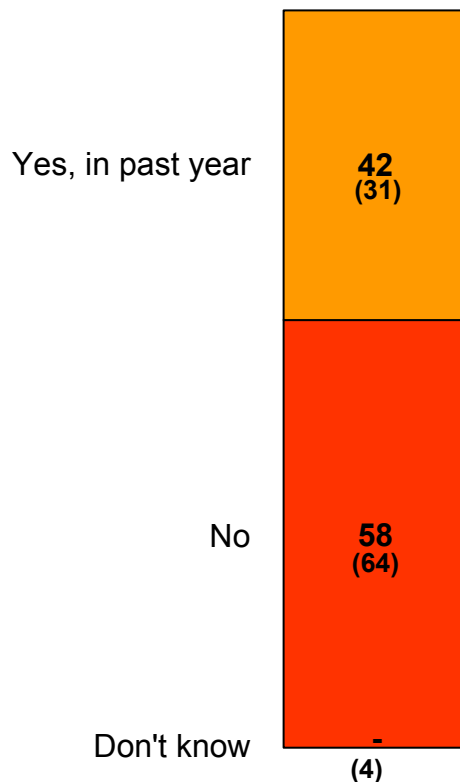
Base
191
%

Yes, in past year — 39 (40)

No — 60 (55)

Don't know — 1 (5)

Leased Lines

Base
53
%

Yes, in past year — 42 (31)

No — 58 (64)

Don't know — - (4)

Mobile Telephones

Base
252
%

None in past year — 57 (47)

Up to 10% — 9 (9)

11-20% — 5 (7)

21-50% — 18 (9)

51%+ — 10

Don't know — 1 (1)

tns mrbi   () = 2002 figures
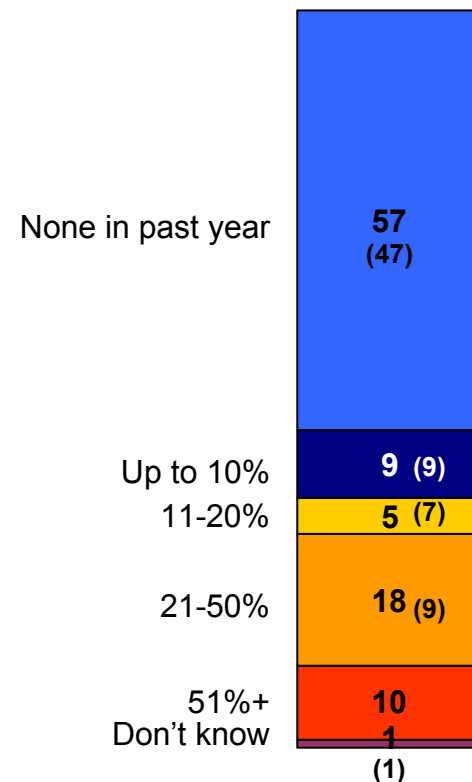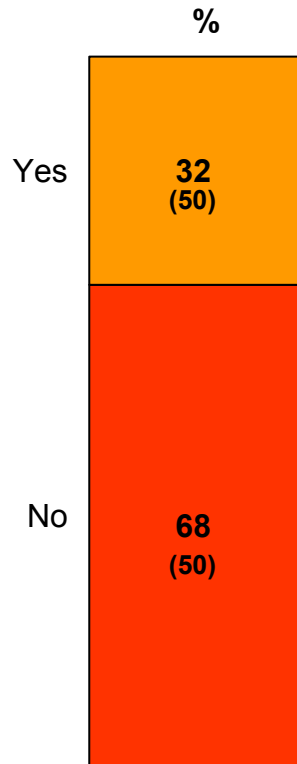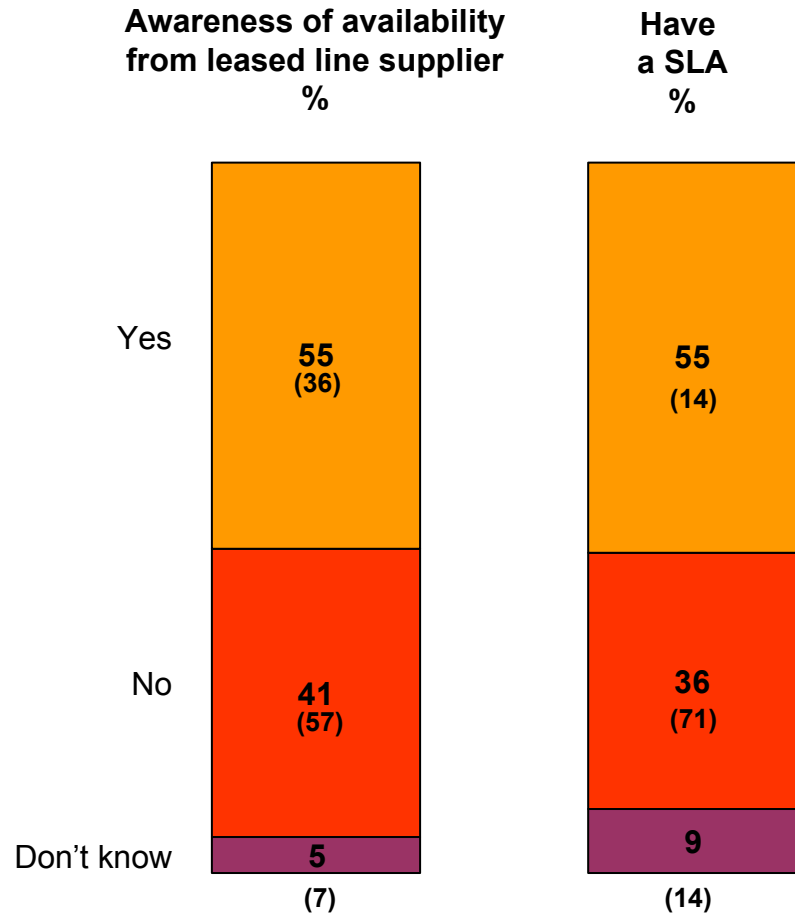
Leased Lines
Base: Companies Where Installed In Past 12 Months: 22*

Difficulties Experienced With Delivery

Service Level Agreement (SLA)

Awareness of availability from leased line supplier %

Have a SLA %

%

Yes
32
(50)

No
68
(50)

Yes
55
(36)

55
(14)

No
41
(57)

36
(71)

Don't know
5
(7)

9
(14)

* Caution: Very small base size

Difficulties With Services To Points Of Operation
Base: All Respondents: 301

Category	Value	(2002)
Price of services offered	31	(31)
Service levels from telecommunications companies	21	(22)
Inadequate bandwidth availability	17	(16)
No alternative supplier(s)	12	(16)
Range of services offered	7	(10)
Other	5	(8)
Don't know	2	(4)
No difficulties	43	(38)

() = 2002 figures (Base: 305)
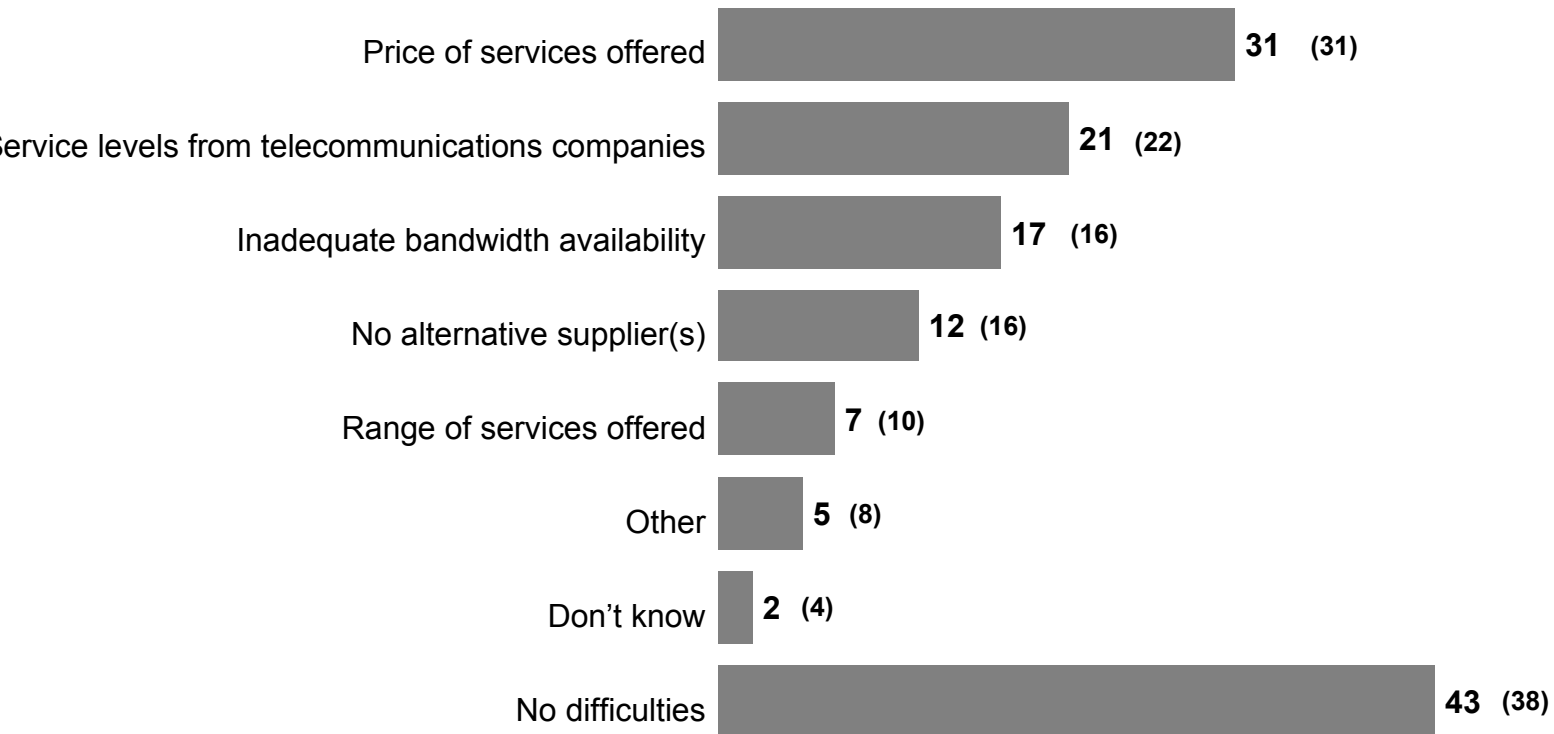
Suppliers Used & Switching Behaviour

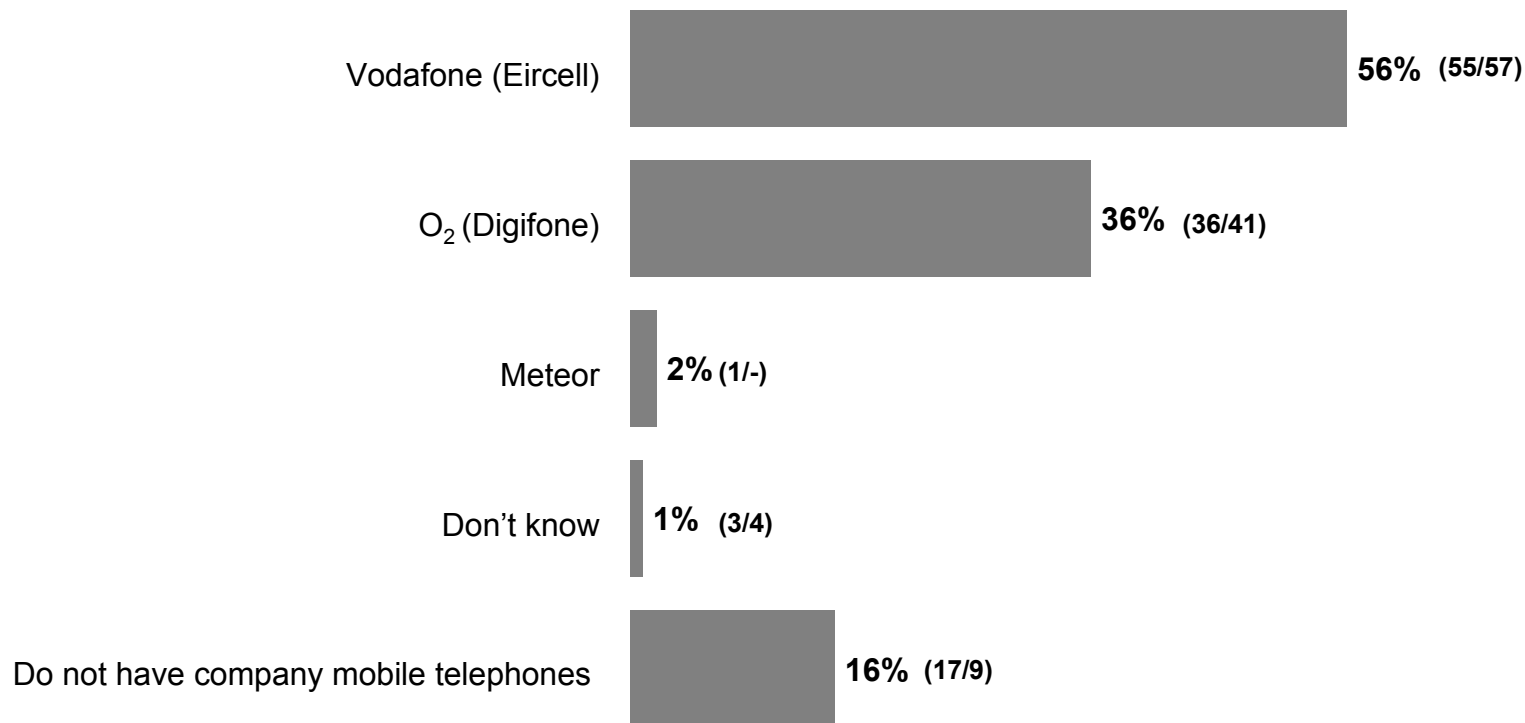# Suppliers Used For Different Call Types

Base: All Respondents: 301

	Local Landline Telephone Calls		National Landline Telephone Calls		International Landline Telephone Calls		Leased Lines		Fixed ISDN Telephone Lines	
	%	2002/ 2001 %	%	2002/ 2001 %	%	2002/ 2001 %	%	2002/ 2001 %	%	2002/ 2001 %
Eircom	75	(77/84)	75	(76/81)	73	(74/77)	14	(10/12)	51	(41/49)
East BT (Clear)	7	(10/8)	7	(10/8)	9	(10/8)	1	(1/1)	5	(5/3)
WorldCom	4	(5/7)	4	(6/7)	4	(7/7)	1	(1/1)	1	(1/2)
Other operators	13	(5/12)	13	(4/10)	13	(3/12)	2	(1/5)	3	(-/2)
Don't know	1	(7/-)	1	(7/2)	1	(7/3)	-	(1/2)	2	(3/2)
Not applicable	-	-	-	-	-	(1/3)	82	(87/83)	38	(50/44)

2002 Base: 305
2001 Base: 200

** = not applicable

Company's Supplier For Mobile Telephone Calls
Base: All Respondents: 301

Supplier	Percentage
Vodafone (Eircell)	**56%** **(55/57)**
O$_2$ (Digifone)	**36%** **(36/41)**
Meteor	**2% (1/-)**
Don't know	**1% (3/4)**
Do not have company mobile telephones	**16% (17/9)**

tns mrbi   (2002/2001) figures

Switched Supplier For Local Landline Telephone Calls In Past 12 Months
Base: All Respondents: 301

%

Yes **23** (25)

No **77** (74)
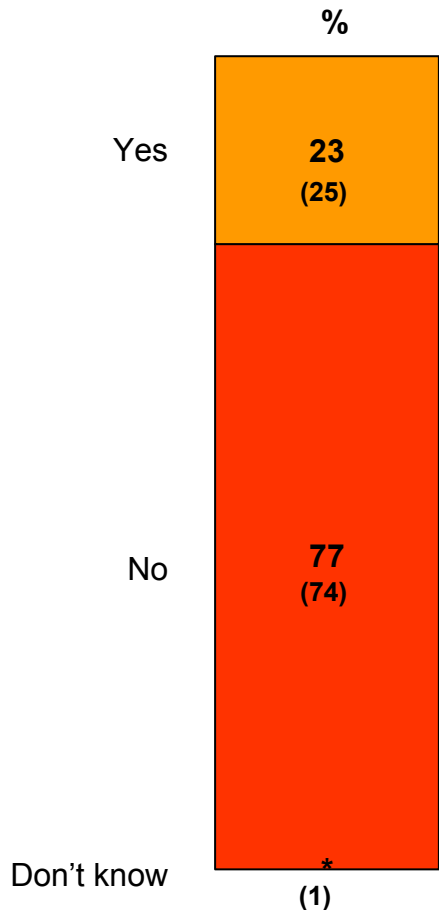
Don't know * (1)

Main Reason(s) For Switching	
Base:	69 %
Cheaper/cost savings	86
Poor service – sought better service	7
Other	13
Don't know	1

Difficulties Encountered	
Base:	69 %
None	80
Service levels were poor/inadequate	3
Cost/rates not cheaper	6
Other	10
Don't know	3

tns mrbi   () = 2002 figures

Switched Supplier For Local Landline Telephone Calls In Past 12 Months (Cont'd)

Base: All Respondents: 301

%

Yes	**23** **(25)**
No	**77** **(74)**
Don't know	***** **(1)**
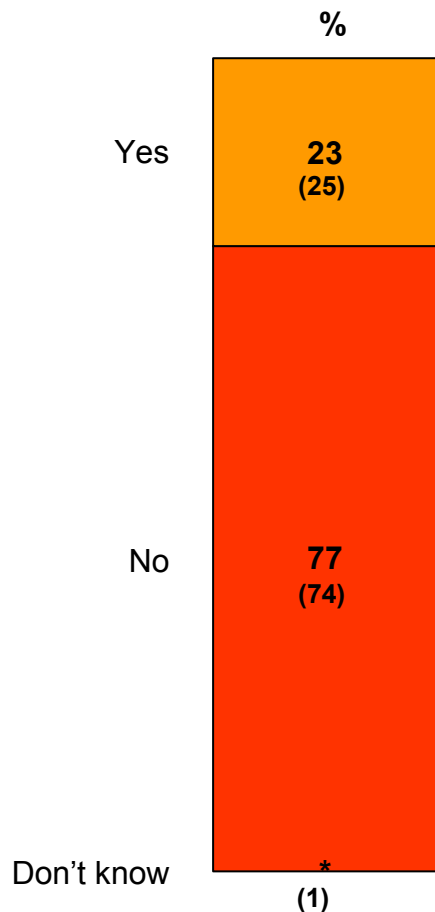
Reason(s) Why Not Considered Changing Supplier	
Base:	231
	%
Satisfied with current supplier/level of service	32
Believe getting the best value for money with current supplier	5
Deals not worth it	5
Too busy – haven't got round to it	1
No alternative carrier has approached	4
Did change, but changed back	7
Currently changing/considering changing	7
Lazy – couldn't be bothered/hassle	8
Unwilling to risk change/uncertain	1
Not aware of options open/lack of information	4
Business too small/low usage/no need/benefit	6
Cost	2
Did consider – decided against it	2
No particular reason	4
Other	8
Don't know	10

tns mrbi   () = 2002 figures

Switched Supplier For National Landline Telephone Calls In Past 12 Months

Base: All Respondents: 301

%

Yes	**23** (24)
No	**77** (75)
Don't know	* (1)
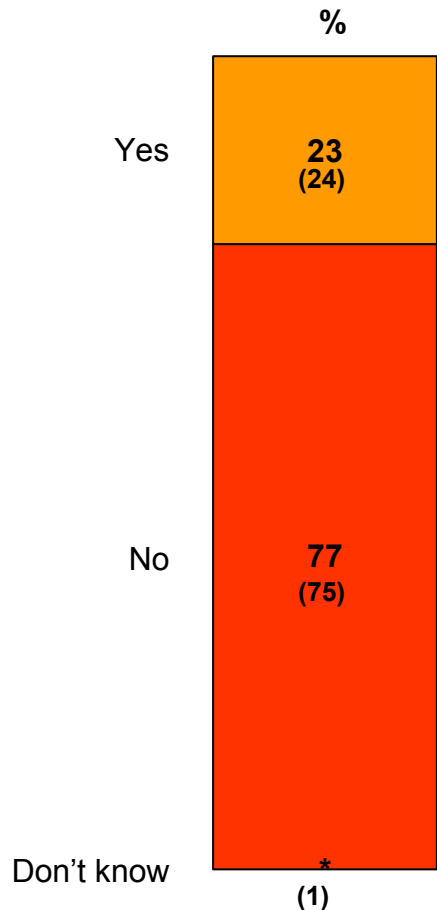
Main Reason(s) For Switching

Base:	69 %
Cheaper/cost savings	83
Poor service – sought better service	6
Other	9
Don't know	9

Difficulties Encountered

Base:	69 %
None	80
Service levels were poor/inadequate	1
Cost/rates not cheaper	1
Other	10
Don't know	7

Switched Supplier For National Landline Telephone Calls In Past 12 Months (Cont'd)
## Base: All Respondents: 301

%

	Reason(s) Why Not Considered Changing Supplier	
Yes	**23** **(24)**	
No	**77** **(75)**	
Don't know	***** **(1)**	
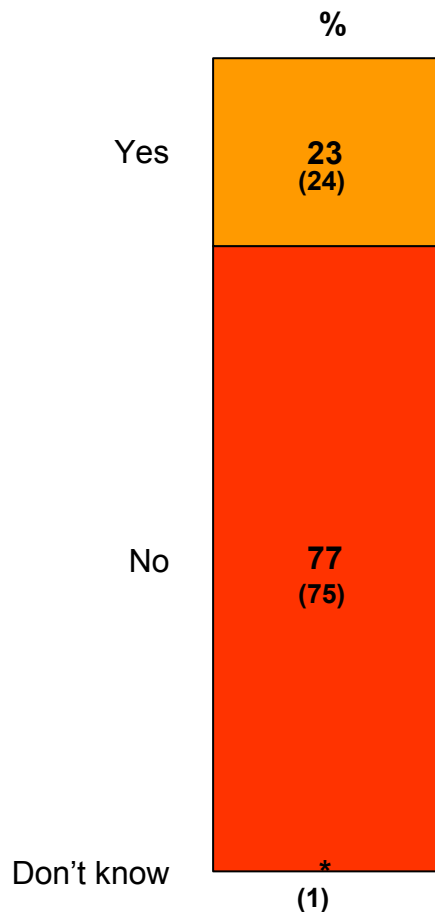
Reason(s) Why Not Considered Changing Supplier	
Base:	231 %
Satisfied with current supplier/level of service	25
Believe getting the best value for money with current supplier	5
Too busy – haven't gotten round to it	2
No alternative carrier has approached	4
Currently changing/considering changing	7
Deals not worth it	6
Did change but changed back	6
Lazy – couldn't be bothered/hassle	7
Too awkward to change	1
Business too small/low usage/no need/benefit	5
Unwilling to risk change/uncertain	2
Lack of information/not aware of options	3
Cost	1
Did consider – decided against it	2
No particular reason	3
Other	6
Don't know	20

() = 2002 figures

Switched Supplier For International Landline Telephone Calls In Past 12 Months

Base: All Respondents: 301

%

Yes

24
(24)

No

76
(75)

Don't know

(1)
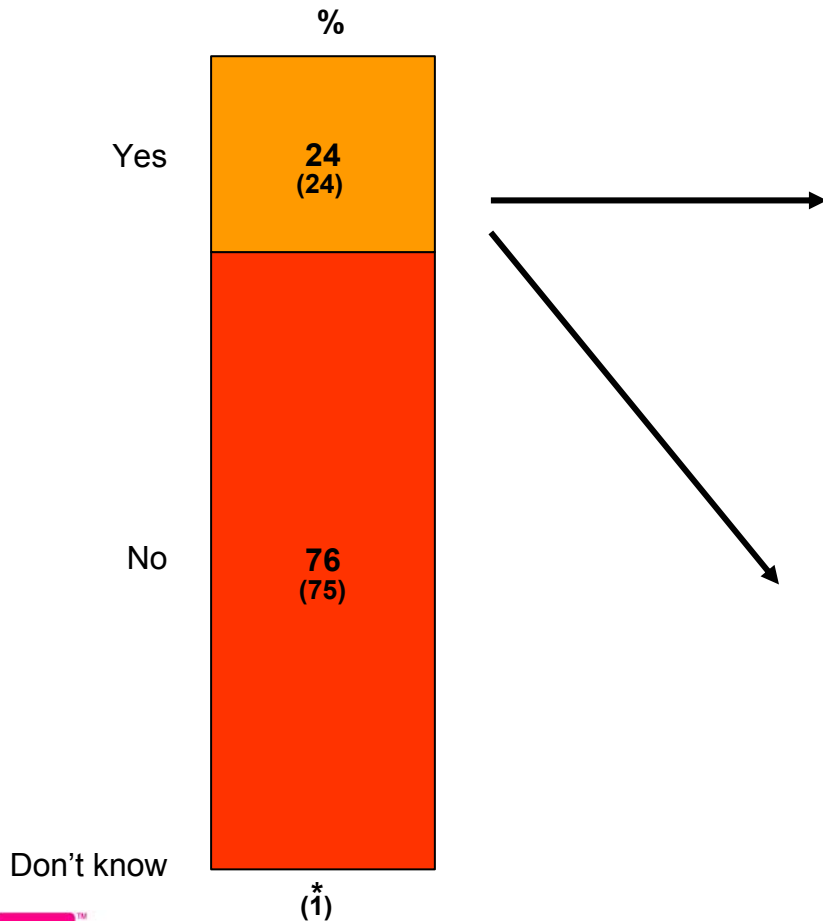
Main Reason(s) For Switching	
Base:	71 %
Price – cost reduction	79
Poor service – sought better service	7
Other	10
Don't know	7

Difficulties Encountered	
Base:	71 %
None	87
Service levels were poor/inadequate	3
Cost/rates not cheaper	-
Other	6
Don't know	4

tns mrbi () = 2002 figures

Switched Supplier For International Landline Telephone Calls In Past 12 Months (Cont'd)
Base: All Respondents: 301

%

Yes
24
(24)

No
76
(75)

Don't know
*
(1)

→
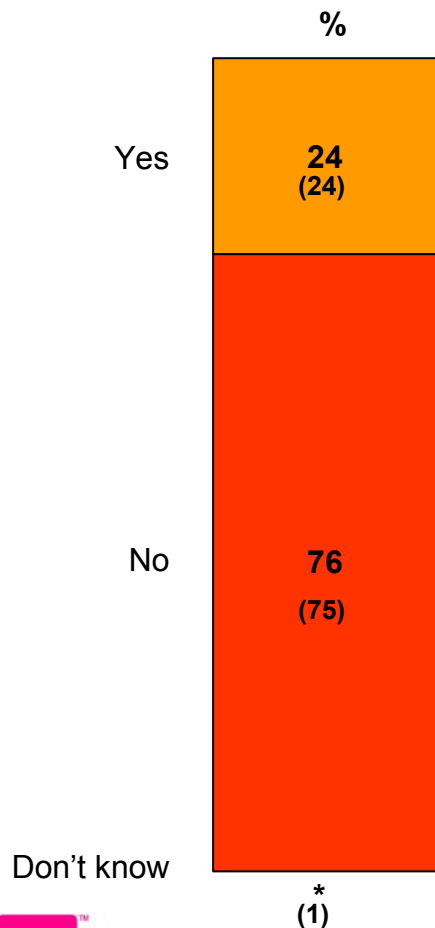
Reason(s) Why Not Considered Changing Supplier	
Base:	229
	%
Satisfied with current supplier/level of service	23
Believe getting the best value for money with current supplier	3
Deals not worth it	4
Too busy – haven't gotten round to it	2
Did change but changed back	7
Currently changing/considering changing	8
Too awkward to change	1
No alternative carrier has approached	3
Lazy – couldn't be bothered/hassle	6
Unwilling to risk change/uncertain	2
Lack of information/not aware of options available	3
Business too small/low usage/no need/benefit	9
Cost	1
Did consider – decided against it	2
No particular reason	3
Other	5
Don't know	21

tns mrbi   () = 2002 figures

Switched Supplier For Mobile Calls
In Past 12 Months
Base: All Respondents: 301

%

Yes

10
(9)

No

90
(90)

Don't know

*
(1)
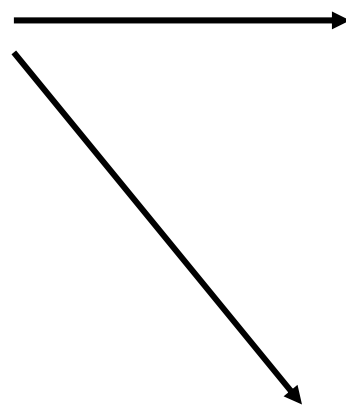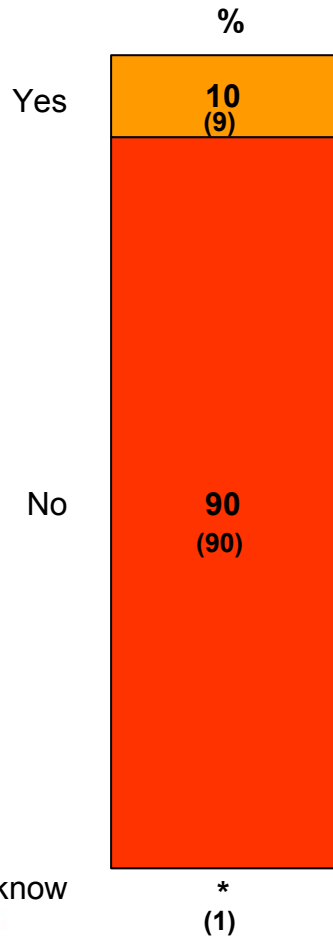
Main Reason(s) For Switching	
Base:	25
	%
Cheaper/cost savings	60
Reception/coverage	16
Other	8
Don't know	20

Difficulties Encountered	
Base:	25
	%
None	44
Service levels were poor/inadequate	16
Other	16
Don't know	24

tns mrbi () = 2002 figures

Switched Supplier For Mobile Calls
In Past 12 Months (Cont'd)
Base: All Respondents: 301

%

Yes	**10** (8)
No	**90** (72)
Don't know	* (21)
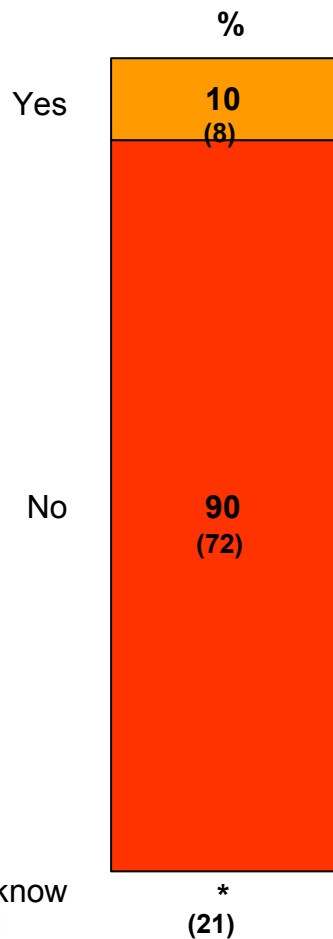
Reason(s) Why Not Considered Changing Supplier	
Base:	226
	%
Satisfied with current supplier/level of service	33
Believe getting the best value for money with current supplier	6
No alternative carrier has approached	2
Currently changing/considering changing	4
Too busy – haven't got round to it	1
Deals not worth it	2
Lazy/couldn't be bothered/hassle	4
Have one from each network	4
Other suppliers lack coverage	4
Business too small/low usage/no need/benefit	9
Did consider – decided against it	2
No reason in particular	3
Cost	1
Other	10
Don't know	18

tns mrbi   ( ) = 2002 figures

Awareness Of Carrier Pre-Selection
Base: All Respondents: 301

	2003 (301) %	2002 (305) %	2001 (200) %
Yes	78	76	78
No	22	24	21
Don't know	1		1
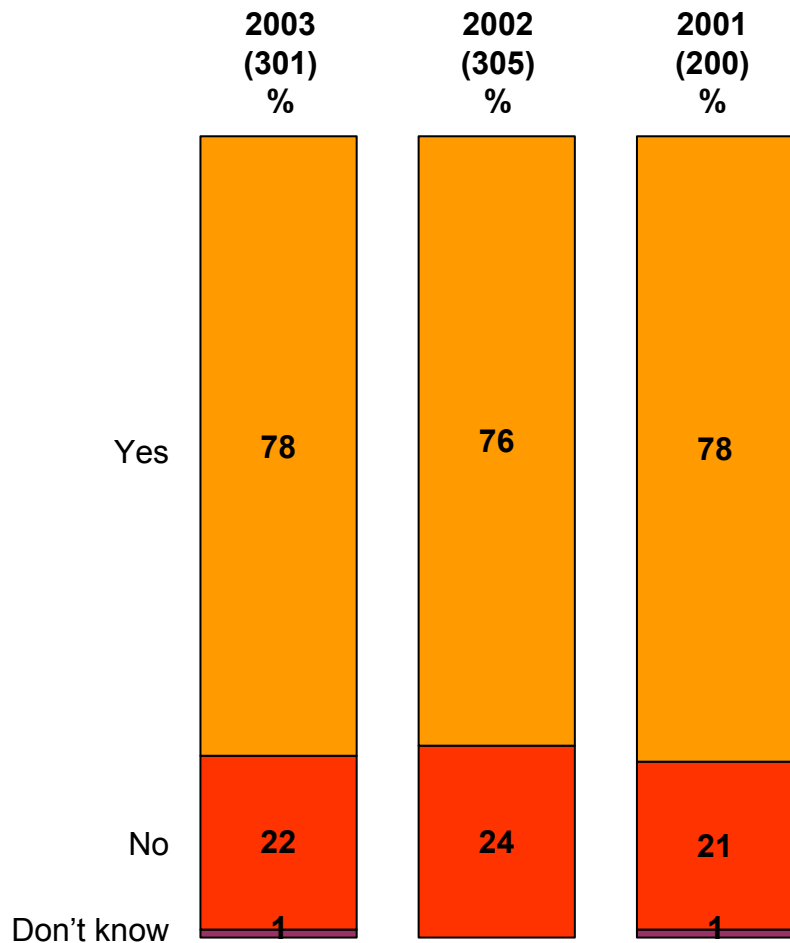
Spontaneous Awareness Of Operator Who Offers Carrier Pre-Selection

Base:	301 %
Esat BT	39
WorldCom	19
Newtel	3
ntl	5
BT	3
Euphony	6
Cable and Wireless	1
Switchcom	3
GTS	1
Atlas	1
Don't know	30

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Whether Approached By A Supplier Other Than Eircom To Switch Part/All Of Fixed Line Call Business In The Past Year

Base: All Respondents: 301

%

Yes **68** (61)

No **31** (36)

Don't know **2** (3)

tns mrbi   () = 2002 figures

Use Of Carrier Pre-Selection
Base: All Respondents: 301

%

We are currently using this service	**23** (20)
...e have used in the past but don't do now	**12** (14)
We are considering using this service	**6** (7)
...We have considered this service, but will not be using it	**16** (14)
We have not considered this service	**42** (41)
Don't know	**2** (3)
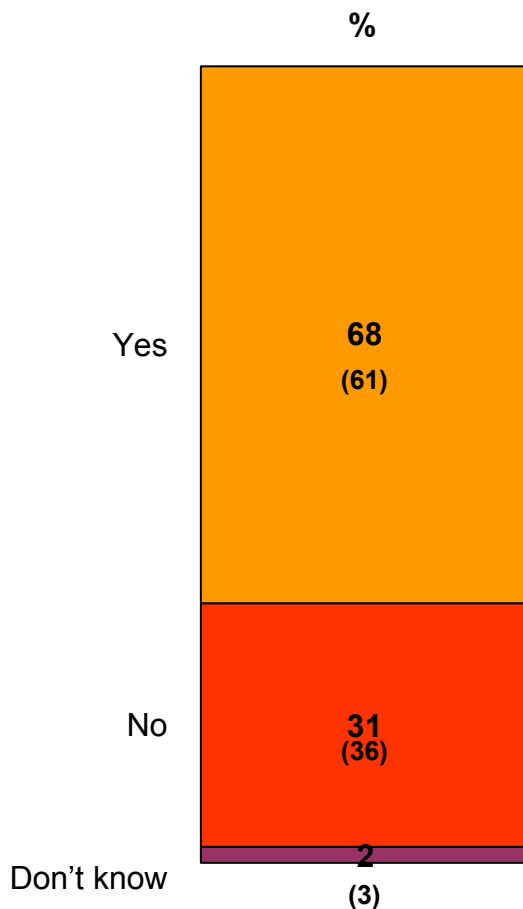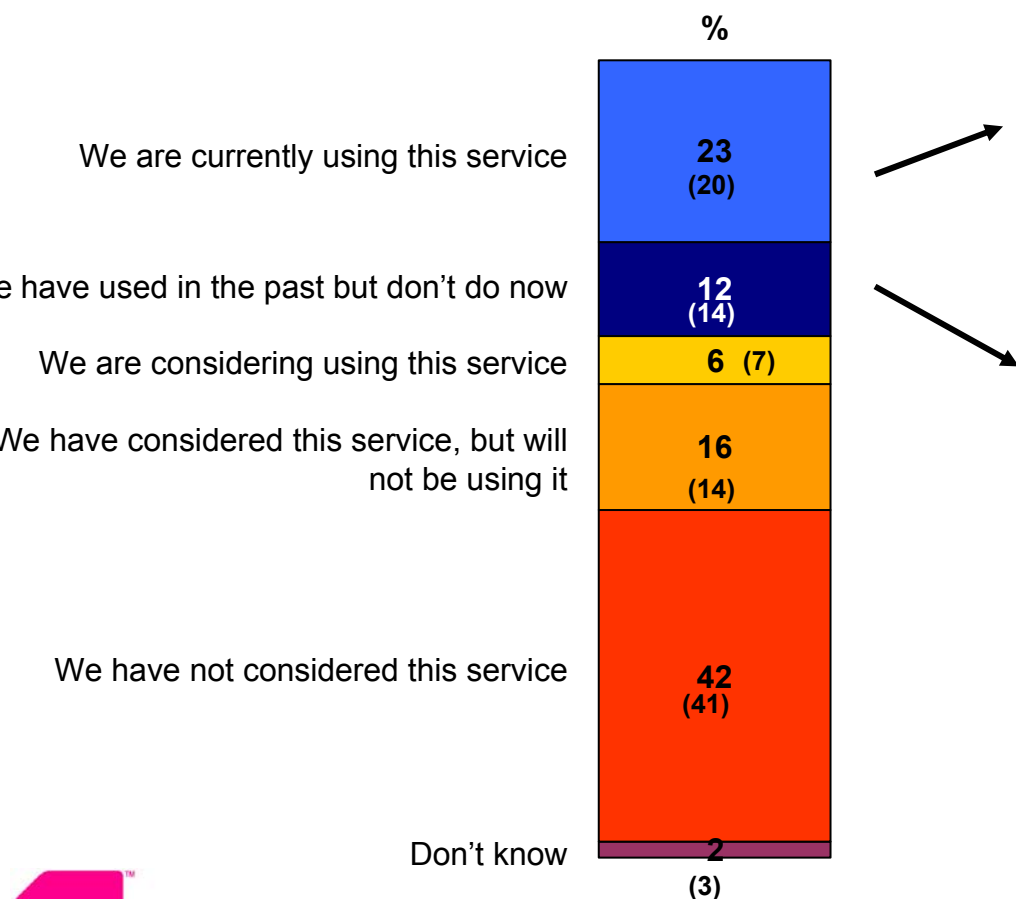
Approached To Go Back To Eircom

Base:	68 %
Yes	53
No	46
Don't know	1

Reason(s) For No Longer Using

Base:	36 %
Eircom came back to us with a cheaper rate/better deal	33
Price – no difference	11
Service was poor/unreliable	25
Better to have one supplier	11
Other	22
Don't know	8

() = 2002 figures

Use Of Carrier Pre-Selection (Cont'd)
Base: All Respondents: 301

%

We are currently using this service	**23** (20)
We have used in the past but don't do now	**12** (14)
We are considering using this service	**6 (7)**
We have considered this service, but will not be using it	**16** (14)
We have not considered this service	**42** (41)
Don't know	**2** (3)
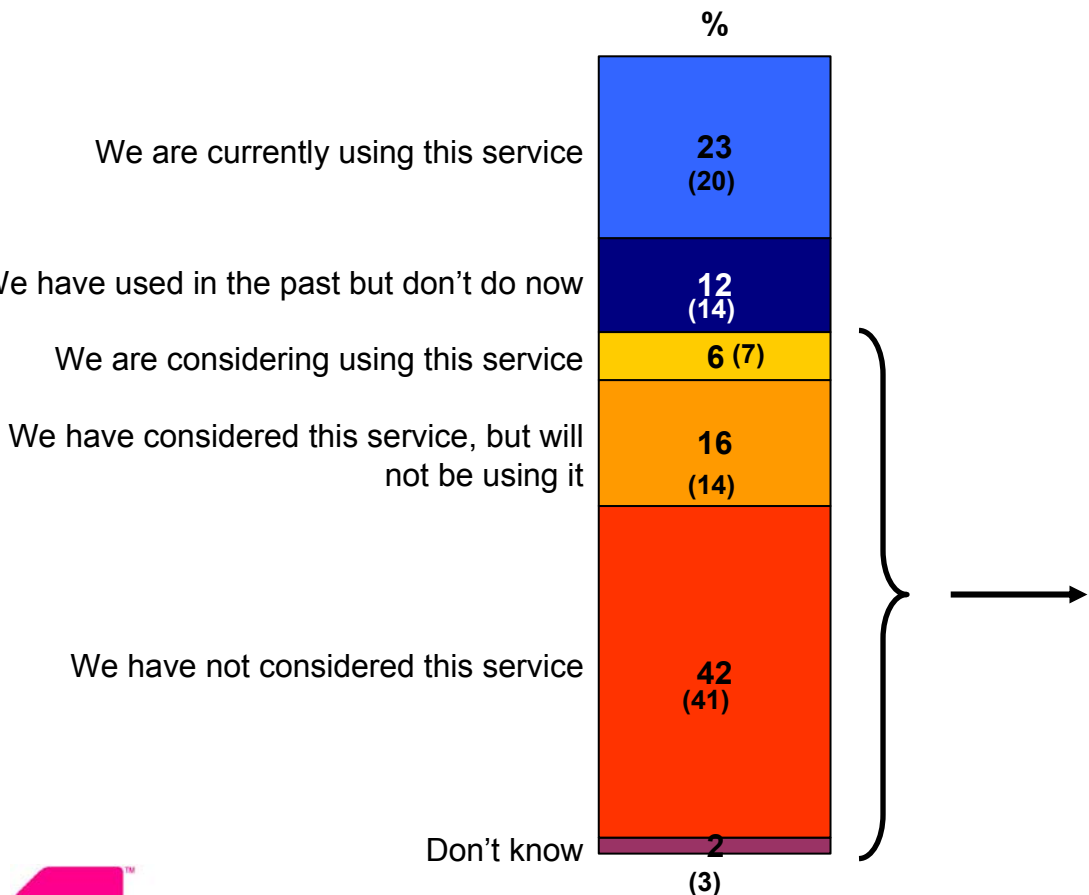
Reason(s) For Not Currently Using

Base:	191
	%
Not aware/lack of information	13
Happy with current suppliers	15
Usage/bills not that high/no incentive	13
Have considered – decide to stay as we are	1
Changeover too much hassle	7
Considering at present	2
Risk of unknown/bad experience	3
Not cheaper	6
No particular reason	11
Other	5
Don't know	26

tns mrbi   () = 2002 figures

Switching Of Any Part Of Fixed Line Telephone Call Business - I

Base: All Respondents: 301

Ever Switched From Eircom

Level Of Service Provided By First Non-eircom Supplier

(301)
%

Yes
44
(47)

No
56
(52)

Don't know
-

(1)

(133)
%

Exceed expectations
8
(9)

Met expectations but no more
63
(53)

Failed to meet expectations
26
(31)

DK
2

(6)

() = 2002 figures
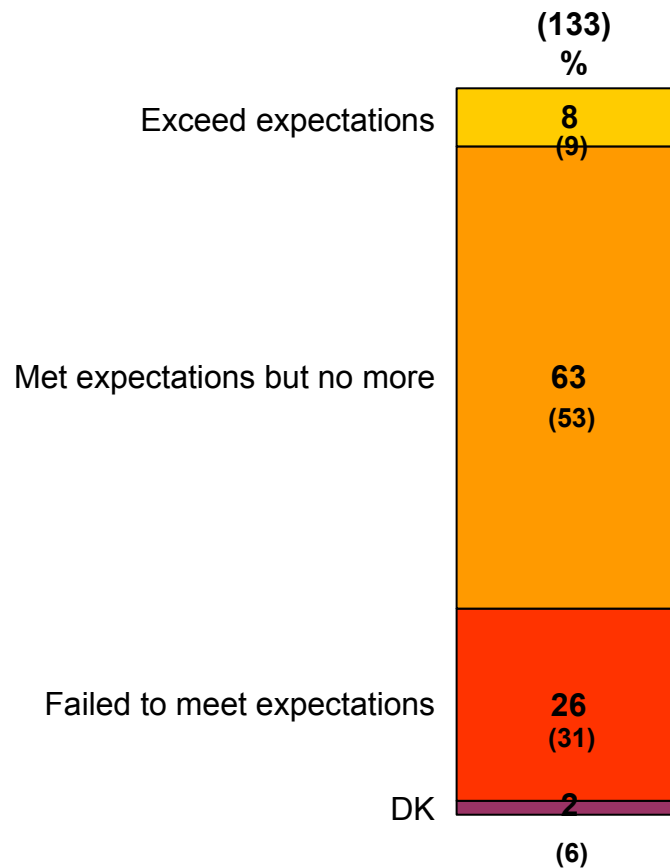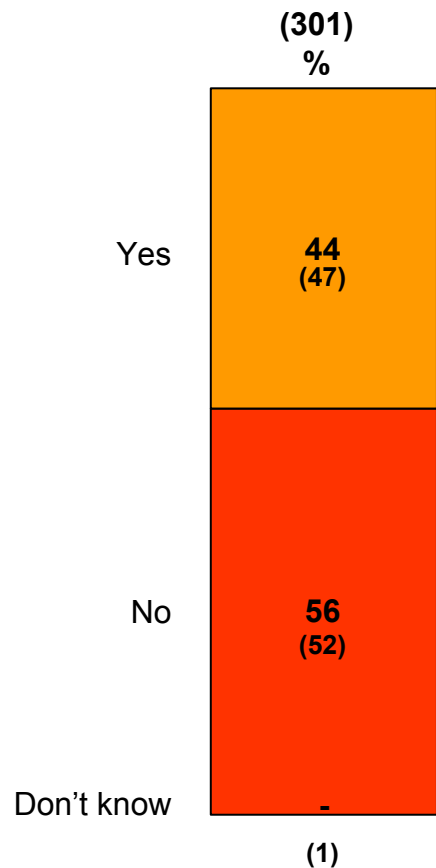
Switching Of Any Part Of Fixed Line Telephone Call Business – II

Base: All Switching Away From Eircom: 133

Ever Switched Back To Eircom

(133)
%

Yes	**48** **(50)**
No	**52** **(50)**
Don't know	**(1)**
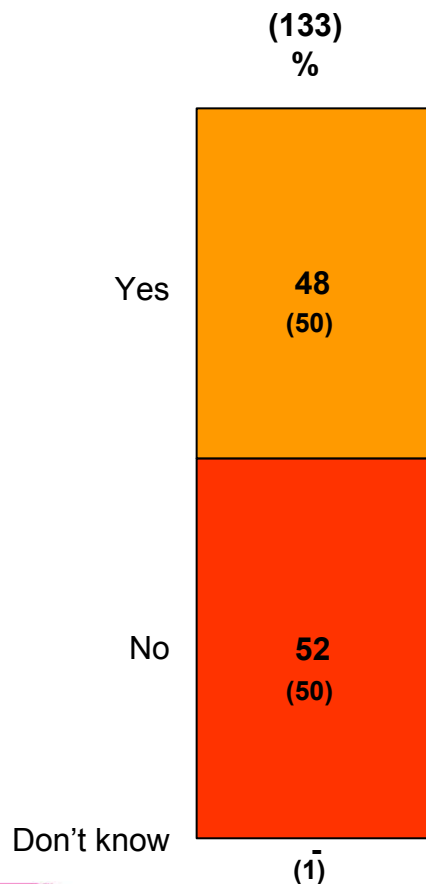
What Prompted Switching Back To Eircom?	
Base:	64 %
Visit from a sales person (original telecom supplier)	36
Telephone call from a sales person (original telecom supplier)	20
Advice from internal staff with knowledge	3
Advice from family/friends, general word of mouth	3
Advice form a consultant	2
Direct mail, brochures etc	6
General media	3
None of these	47

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() = 2002 figures

Likelihood Of Switching Fixed Line Telecoms Supplier In The Next 12 Months
Base: All Respondents: 301

	2003 %	2002 %
Extremely likely	3	3
Very likely	8	7
Fairly likely	18	15
Fairly unlikely	14	12
Not very likely	19	15
Not at all likely	34	40
Don't know	5	8

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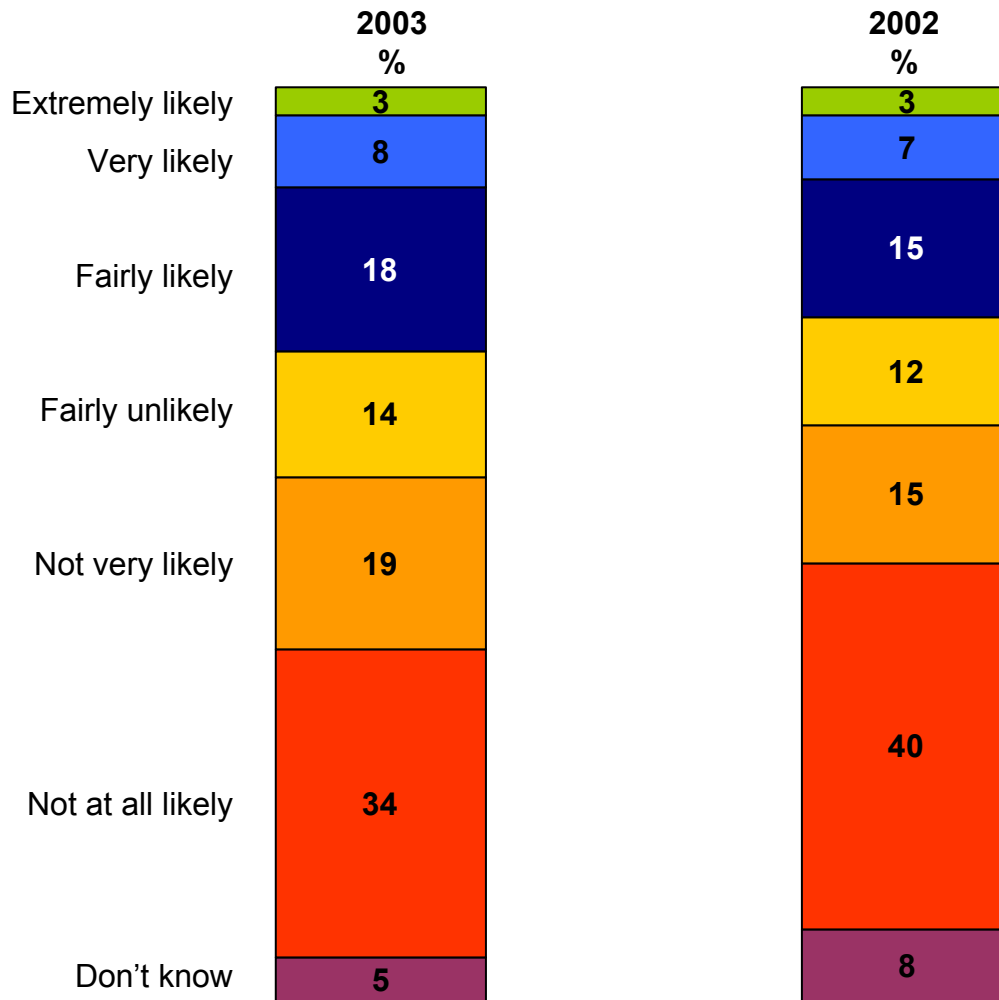
Sources Of Information Used To Find Out About Telecoms Services – Share of Voice

Base: All Respondents: 301

	2003 %	2002 %
General media	21	21
Family/friends, general word of mouth	14	18
Someone within telecoms supplier	14	17
Direct mail, brochures etc.	16	15
Internal staff with knowledge in this area	8	
Specialist media	9	10
External consultant	9	9
None of these	8	6
Don't know	1	1

tns mrbi
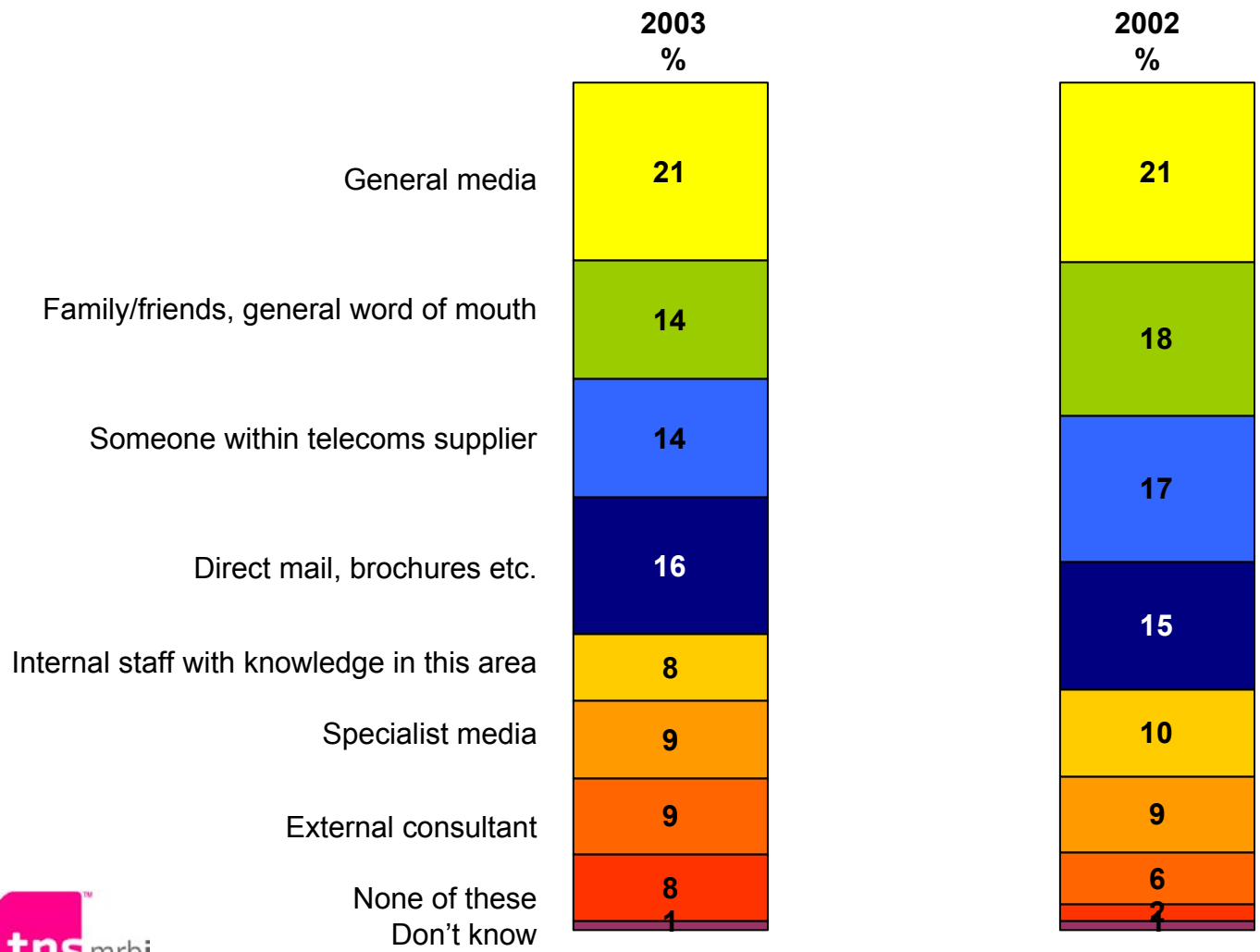
Availability Of DSL
Base: All Respondents: 301
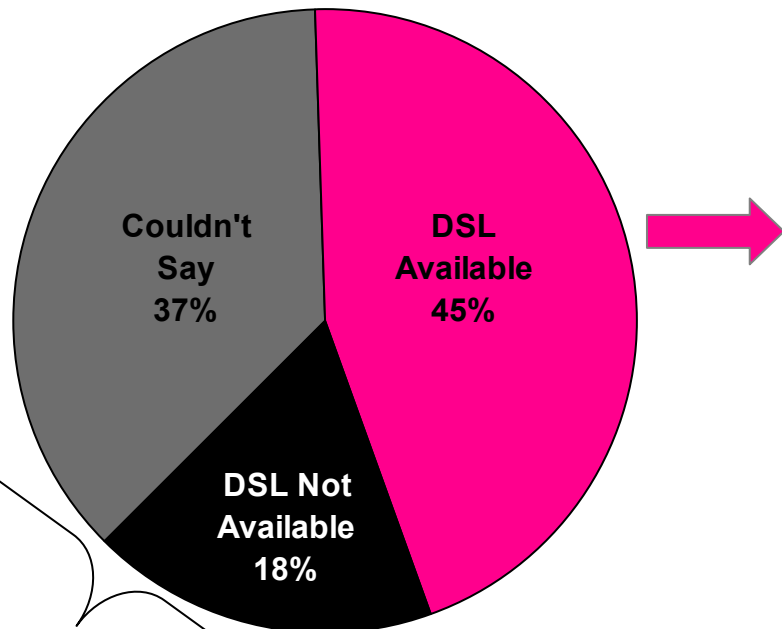
Likelihood Of Subscription

	Where DSL is available %	Where DSL not available %
Very likely (4)	38	18
Quite likely (3)	13	25
Rather unlikely (2)	10	5
Very unlikely (1)	24	20
Don't know	16	31
Mean Score	2.77	2.59

Pie chart:
- Couldn't Say 37%
- DSL Available 45%
- DSL Not Available 18%
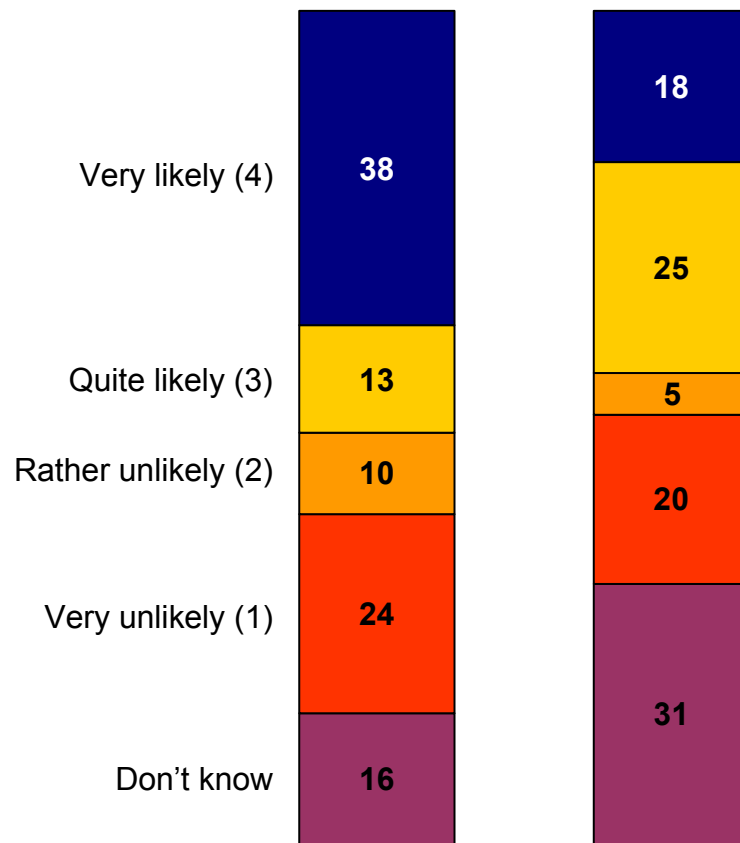
Whether Lack of DSL a disadvantage to business

Base: 166	%
Yes	22
No	45
Don't know	33

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Mobile Telephone Services

Mobile Phone Package Used
Base: All Respondents: 301

	2003 (301) %	2002 (305) %	2001 (200) %
Prepaid	4	3	5
Monthly subscription contract	66	66	71
Timeshare	13	13	14
Don't know/no company mobile phones	17	18	10
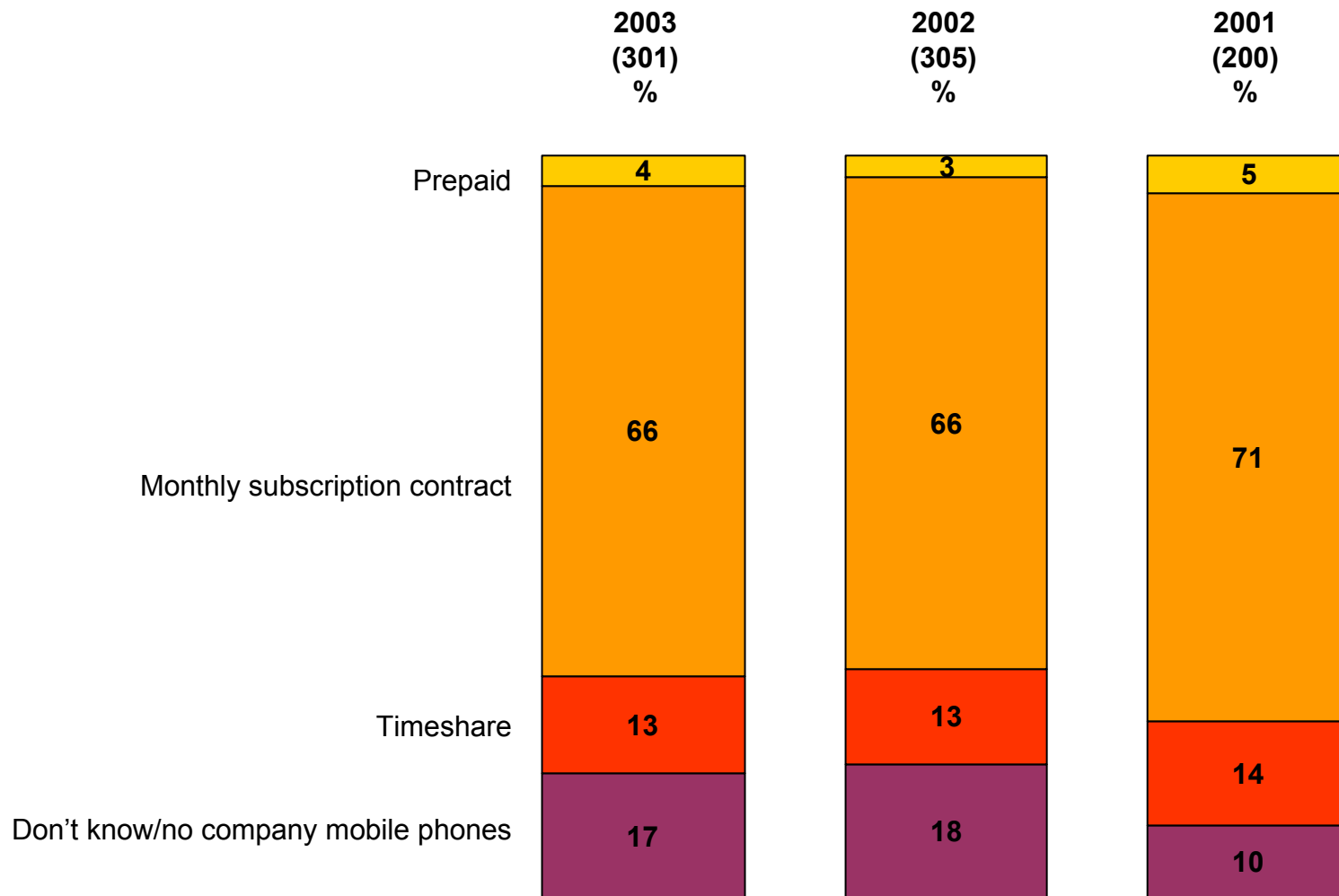
Quality Of Service From Mobile Operators
Base: All Respondents: 301

Any Difficulties Experienced?

%

Yes	**16** (16%)
No	**67** (66%)
Don't know	**-** (1%)
No company mobile phones	**16** (17%)
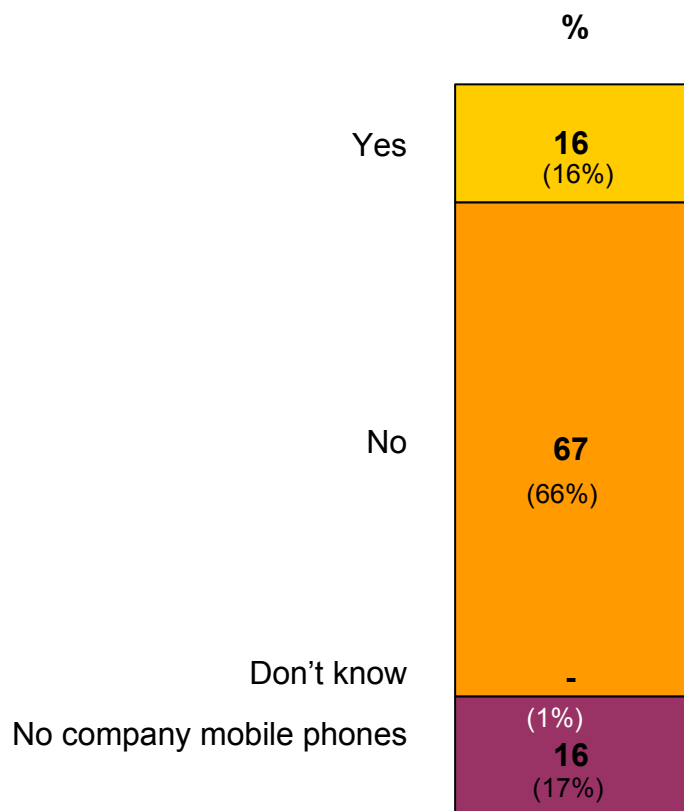
Types Of Difficulty Experienced?

Base:	49
	%
Poor coverage	49
Problems with reception/signal	20
Dropped calls	14
Network poor/busy	16
Prices/high charges	8
Cutting off – no reach	8
Poor service/response	4
Other	12
Don't know	2

Whether Complaint Made To Operator

Base:	49
	%
Yes	35
No	63
Don't know	2

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() = 2002 figures

Satisfaction With The Cost Of Using Mobile Phones In Ireland/Abroad

Base: All Respondents: 301

	In Ireland 2003 (301) %	Abroad 2003 (301) %
Very satisfied	10	3
Fairly satisfied	36	17
Not very satisfied	19	16
Not at all satisfied	17	24
Don't know/not applicable	18	41

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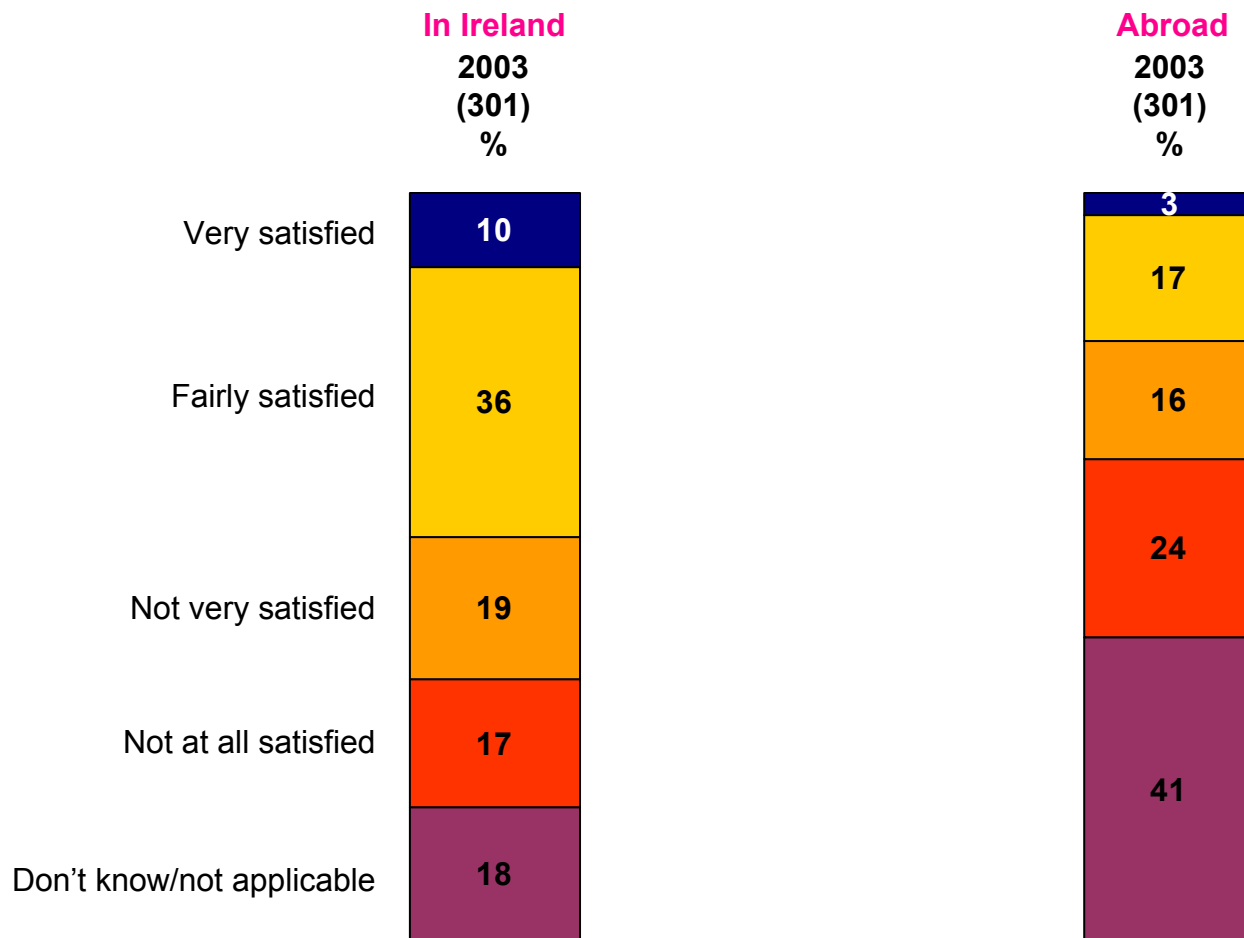
Mobile Phone Use Aboard
Base: All Respondents: 301

	2003 (301) %	2002 (305) %	2001 (200) %
Frequently	18	12	15
Sometimes	18	23	15
Rarely	27	27	40
Never	20	21	21
Don't know/no company mobile phones	17	19	9
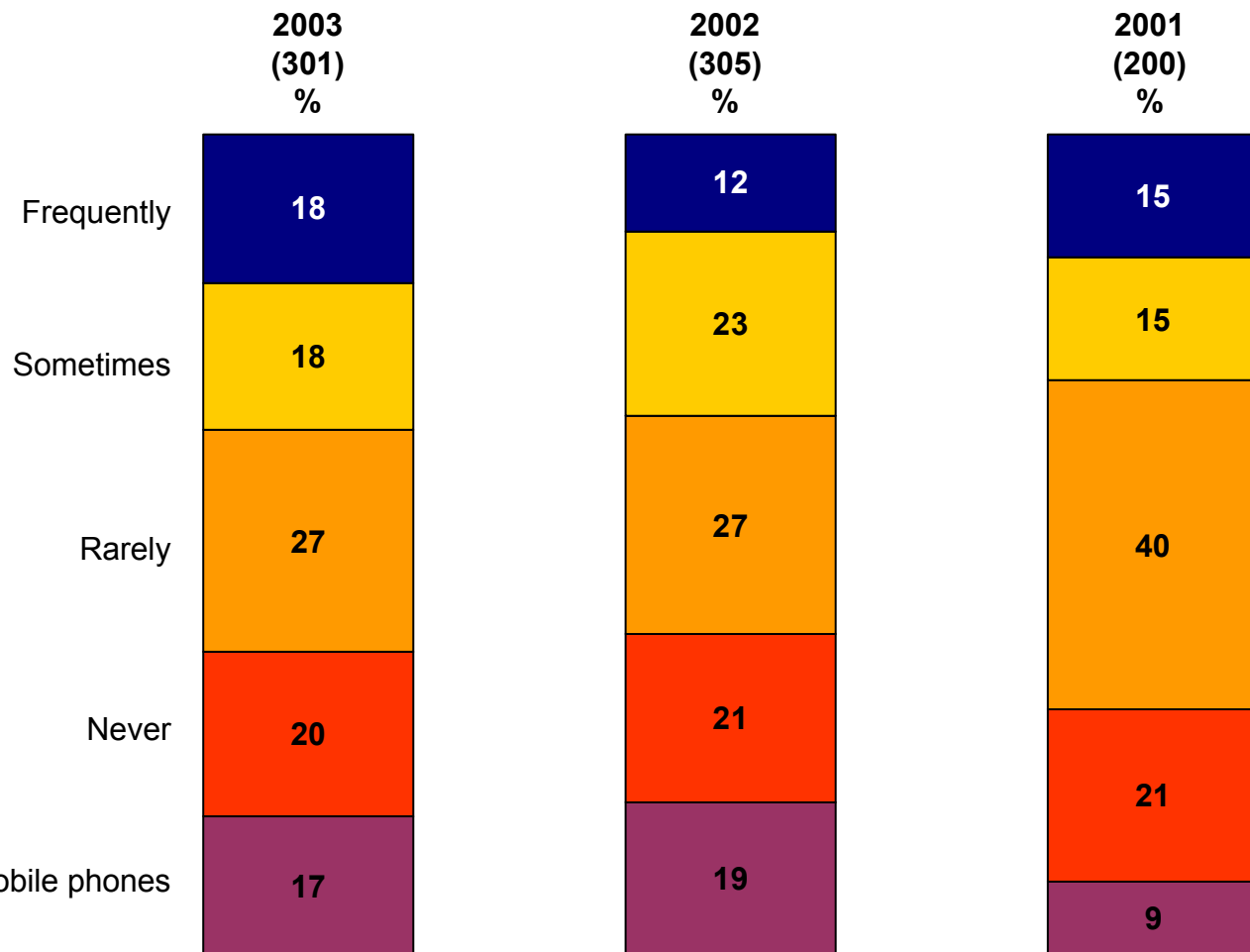
Awareness Of Difference In Cost Of Calling Another Mobile Network

Base: All Respondents: 301

	2003 (301) %	2002 (305) %	2001 (200) %
Yes	58	60	69
No	24	22	21
Don't know/no company mobile phones	18	19	10
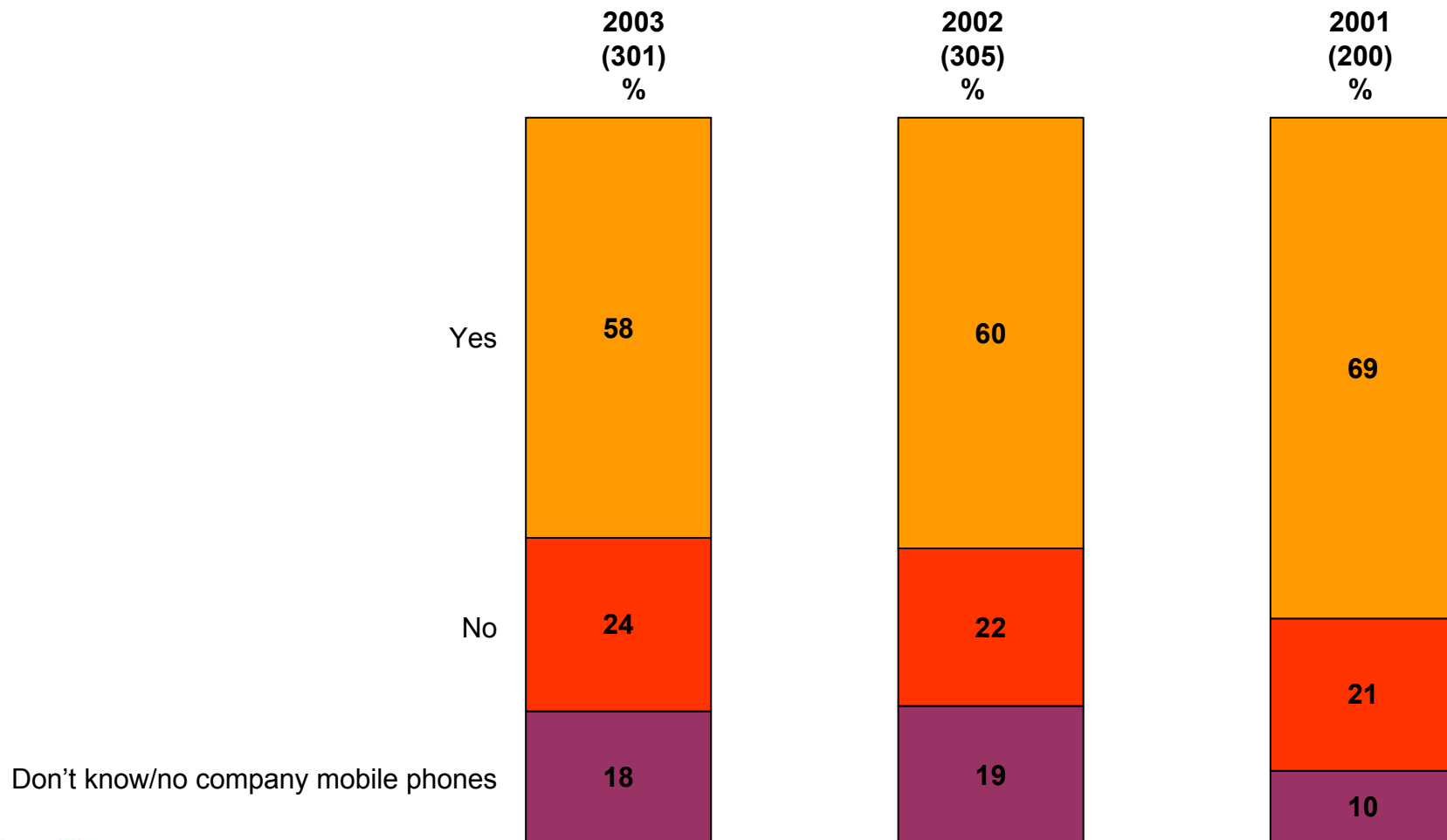
Encourage Text Messaging
Base: All Respondents: 301

	2003 (301) %	2002 (305) %	2001 (200) %
Yes, strongly	12	11	7
Yes, slightly	11	7	7
No	51	52	75
No company mobile phones	16	17	11
Don't know	11	13	-

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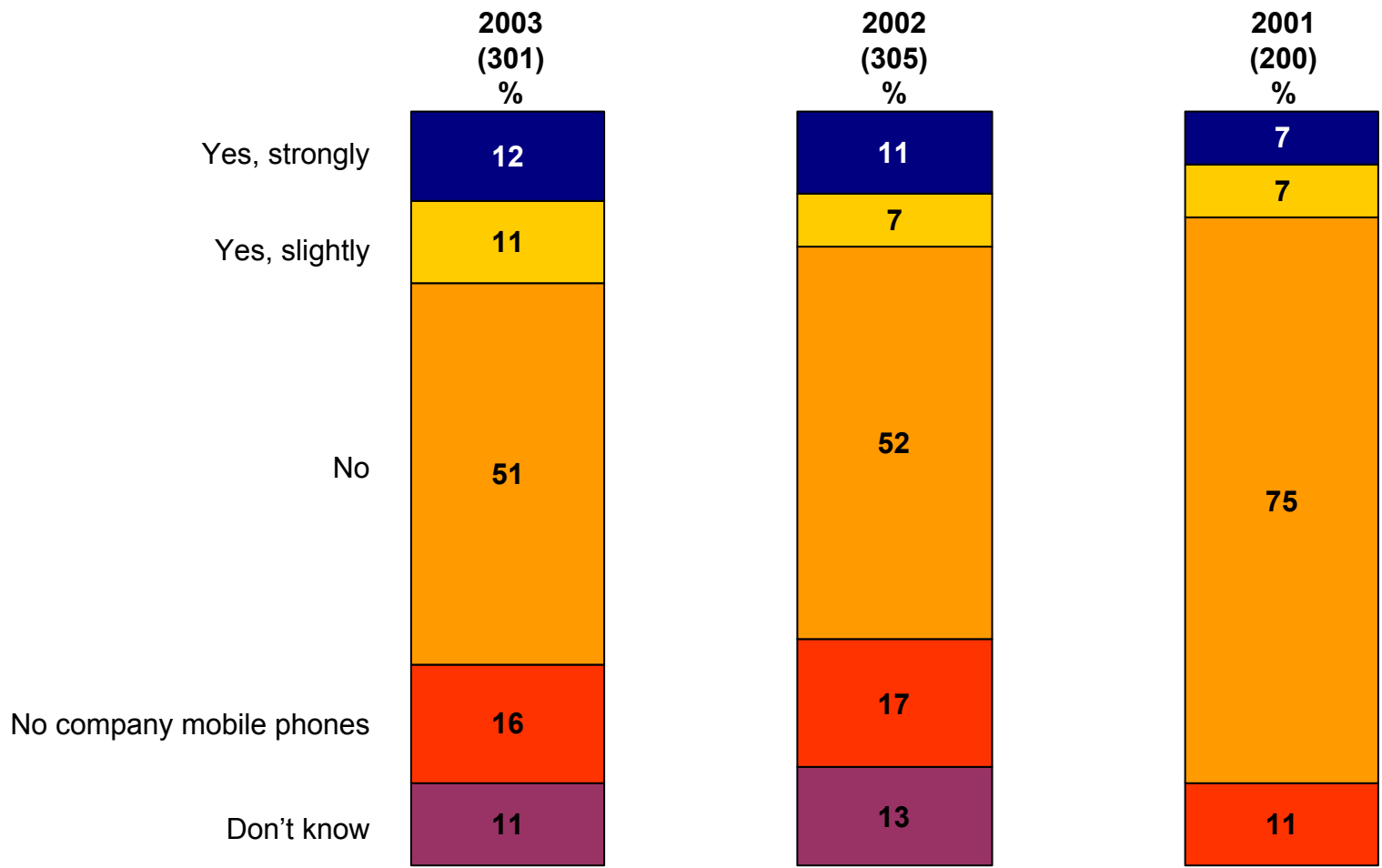
Internet Usage

Connection To The Internet
Base: All Respondents: 301

%

Yes, connected

90
(84)
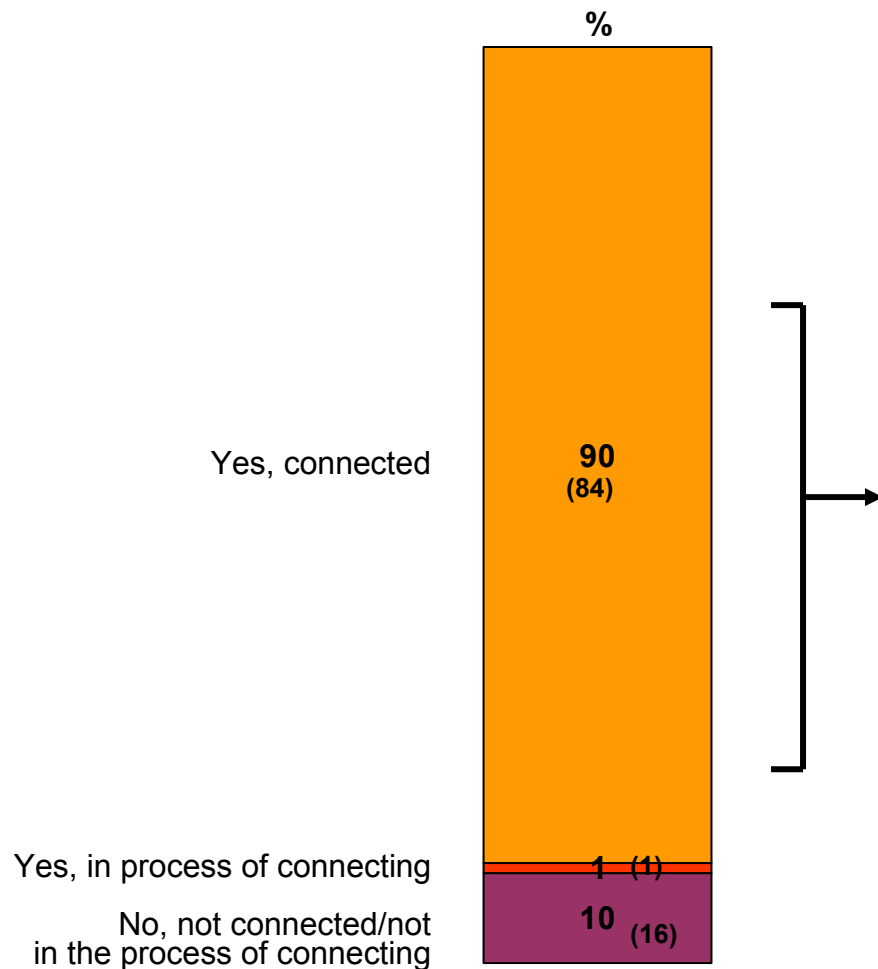
Internet Connection Speed	
Base:	(272)
	%
Ordinary phone line/dial up access	39
ISDN line	46
Dedicated lease line	8
DSL	10
Other	4
Don't know	1

Yes, in process of connecting

1 **(1)**

No, not connected/not
in the process of connecting

10 **(16)**

() = 2002 figures

Type Of Internet Package Used
Base: All Connected To The Internet: 272

Current

Likelihood Of Subscribing To An Always On High Speed Internet Service

	2003 %	2002 %
Monthly subscription and share of the cost of the calls whilst on-line	27	30
No subscription – only the cost of the calls while on-line	36	31
Set fee for always on access	28	21
Don't know	9	18

	2003 %	2002 %
Very likely	24	25
Fairly likely	19	17
Not very likely	10	14
Not at all likely	26	31
Already subscribe	17	
Don't know	4	13

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Bandwidth Connection

Base: All Connected To The Internet: 272

Changes To Bandwidth Connection In The Past 12 Months

	2003 %	2002 %
Increased	24	12
Decreased	3	
Made no change	69	73
Don't know	4	15
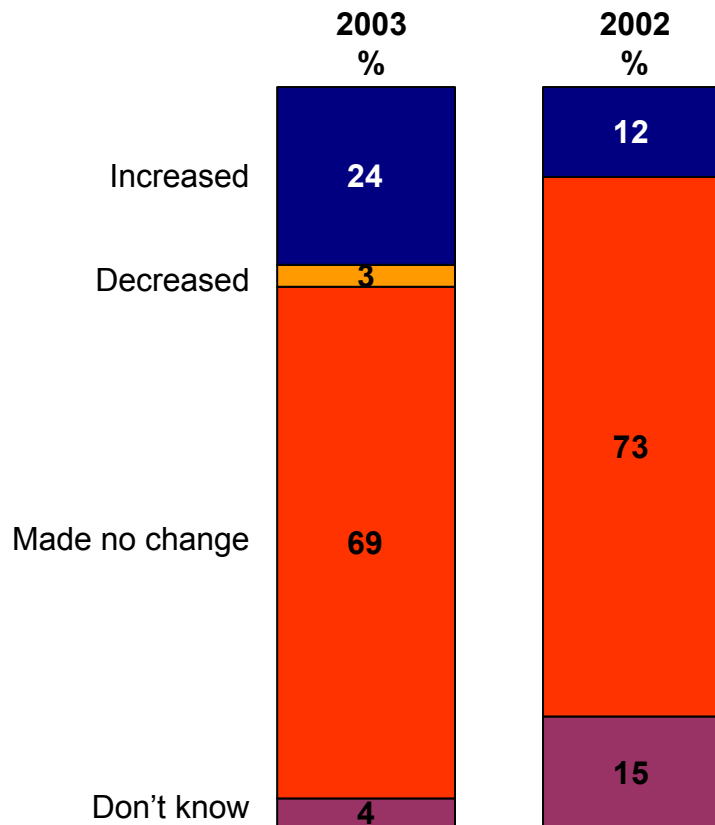
Whether Plan To Increase Bandwidth Connection In The Next 12 Months

	2003 %	2002 %
Yes	33	26
No	54	53
Don't know	13	22

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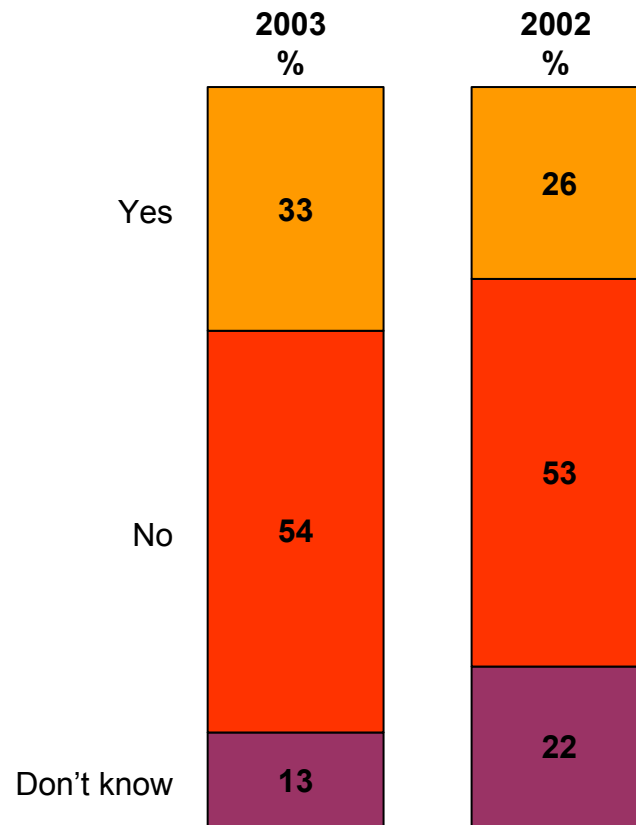
E-Business Applications Requiring Internet Use
Base: All Connected To The Internet: 272

	2003 (272) %	2002 (259) %	2001 (183) %
Email with suppliers/customers	87	79	80
Booking travel/accommodation	53	61	n/a
Sourcing competitor, market or other information from websites	61	58	84
On-line banking	60	56	49
E-mail within company	54	44	45
On-line purchasing from suppliers/orders from customers	41	39	32
On-line payments to suppliers/from customers	29	27	25
Communicating with newsgroups	19	21	14
Video conferencing	6	3	1
Other	2	1	1
Don't know	-	7	4

Internet Sites Used Most Regularly By Business, Excluding Search Engines
Base: All Connected To The Internet: 272

	2003 %	2002 %
Supplier websites	7	12
Ryanair	5	8
Aer Lingus	4	5
Travel and accommodation (general)	10	7
Banking	21	7
Media/news	3	6
Revenue On-line	3	3
Financial sites	2	-
Other Government	2	3
Business and industry related	12	3
Own website	2	-
Professional bodies	1	3
Eircom	3	2
Email	2	-
Other	16	14
Don't know	25	48

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Effect Of Internet Sites Used On How Company Does Business

	2003 %	2002 %
Useful information tool/provides quick up to date info	12	14
Improves efficiency	6	8
Enhances selling and marketing	6	7
Time/labour saving	9	5
Provides helpful ideas and suggestions	3	3
Reduces paperwork	*	3
Easier/convenient	7	3
Cost effective	2	2
Makes travelling abroad easier	-	2
Big impact/positive influence in general	14	4
Marginal effect only	4	6
Nothing in particular	13	7
Other	1	3
Don't know	33	49

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Company Website
Base: All Respondents: 301

Status

**Likelihood Of Establishing
In Next 12 Months**

	2003 (301) %	2002 (305) %	2001 (200) %
We currently have a website	50	52	48
We had a website in the past but don't now	1	2	1
We are planning to develop a website	19	20	29
We have considered developing a website but have decided against it	6	8	8
We have not considered developing a website	22	17	13
Don't know	2	2	9

	2003 (122) %	2002 (101) %	2001 (87) %
Very likely	31	33	37
Quite likely	20	11	21
Rather unlikely	10	11	17
Very unlikely	39	33	22
Don't know	1	13	3

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Increased Use Of Internet By Suppliers And Customers
Base: All Respondents: 301

Suppliers/customers Using More Often

%

Yes	51 (53)
About the same	16 (5)
No	31 (39)
Don't know	2 (4)
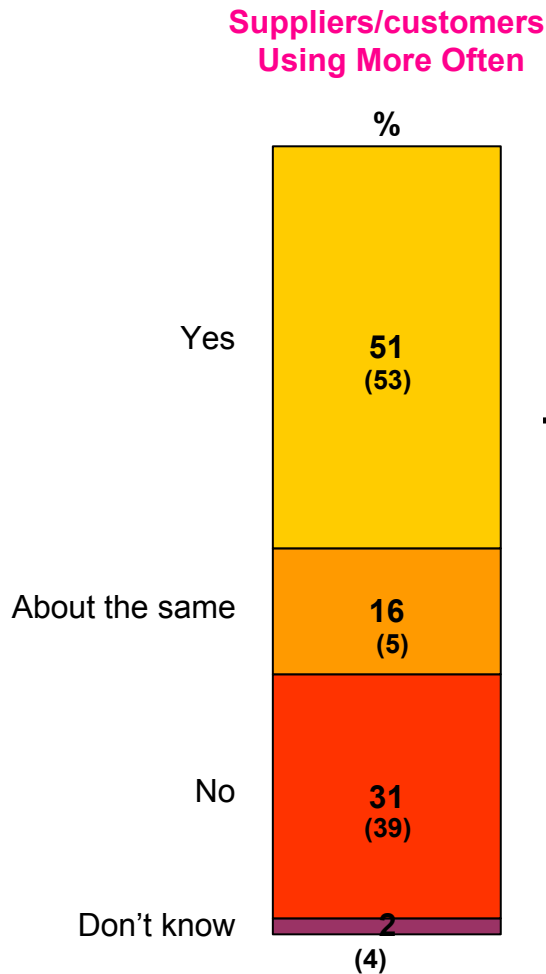
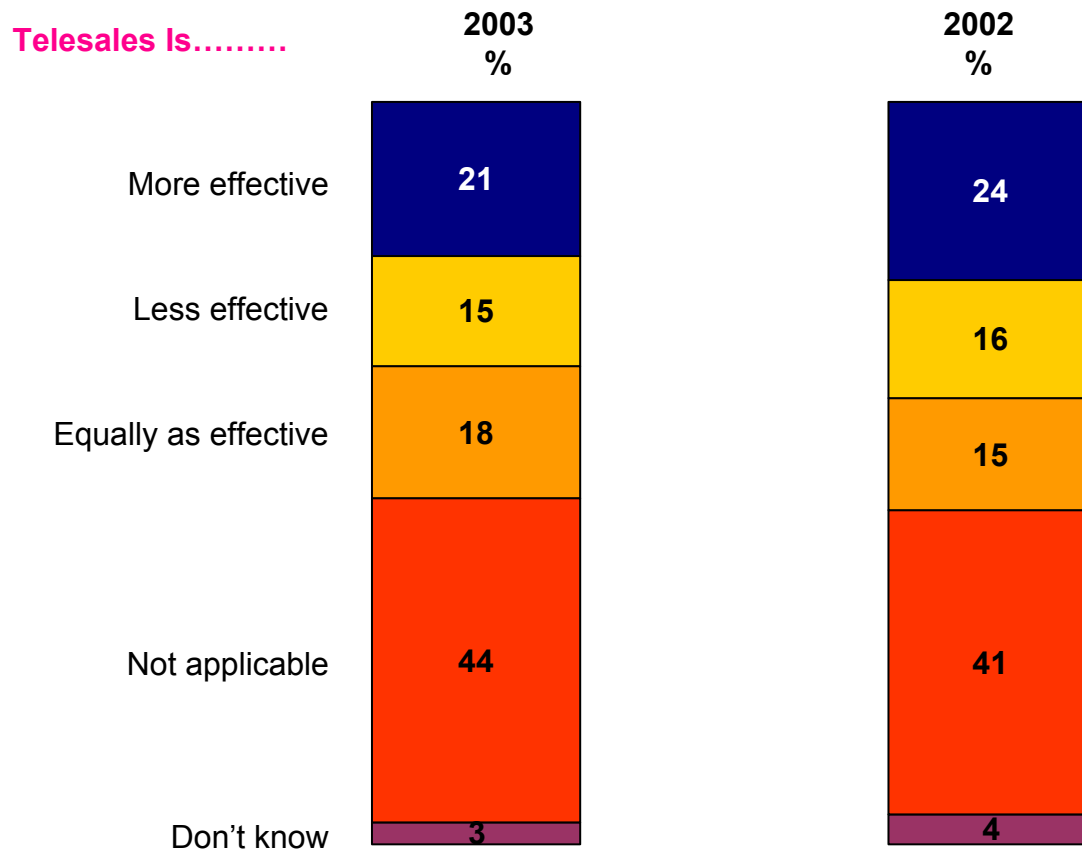| Customer/supplier Companies	
Base:	(155)
	%
Mainly domestic	55
Mainly international	12
Both	32
Don't know	1

tns mrbi   () = 2002 figures

Likelihood Of Company Buying/Selling Something Over The Internet In The Next 12 Months

Base: All Respondents: 301

Buy

	2003 %	2002 %
Very likely	36	38
Quite likely	21	15
Rather unlikely	13	10
Very unlikely	28	34
Don't know	2	2

Sell

	2003 %	2002 %
Very likely	19	17
Quite likely	12	9
Rather unlikely	13	10
Very unlikely	55	63
Don't know	2	2

tns mrbi
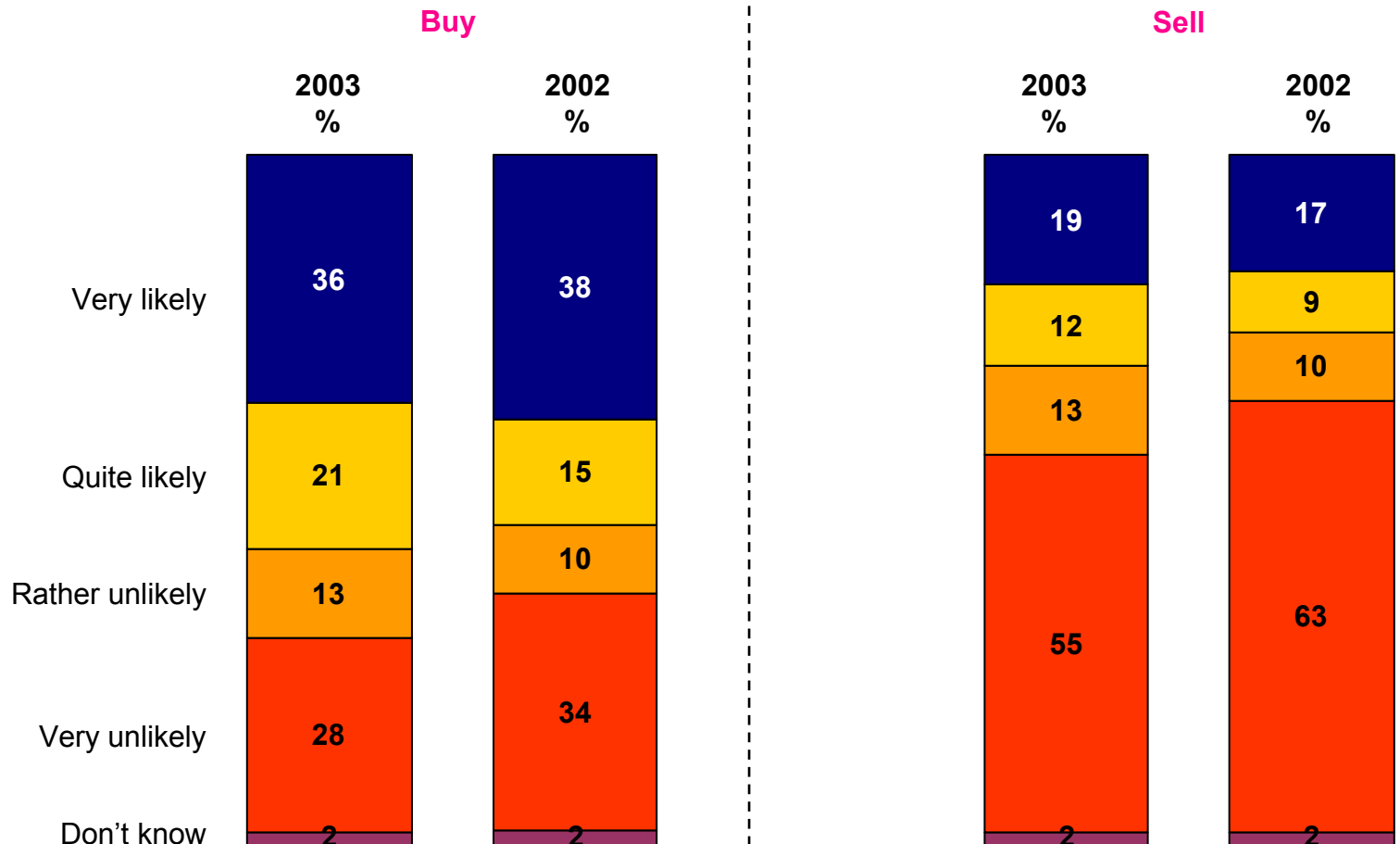
Comparison Between Telesales And The Internet For Selling Business

Base: All Respondents: 301

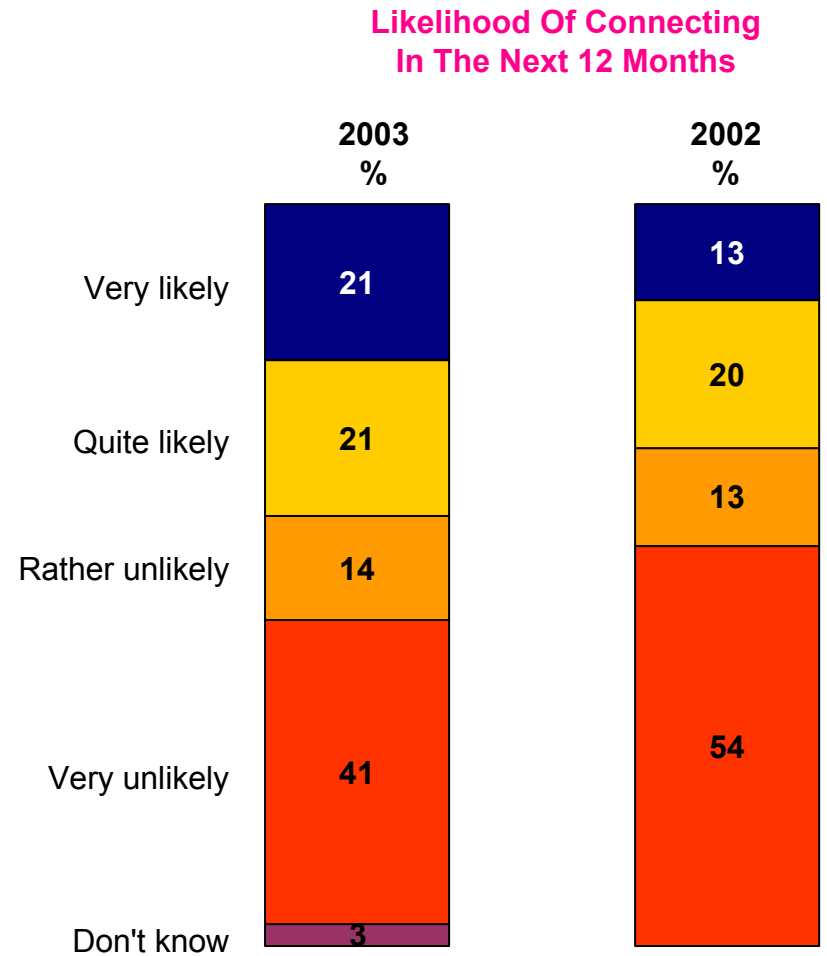| Telesales Is………	2003 %	2002 %
More effective	21	24
Less effective	15	16
Equally as effective	18	15
Not applicable	44	41
Don't know	3	4

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Reasons Why Not Connected To The Internet And Likelihood Of Connecting In Next 12 Months

Base: All Respondents Not Connected: 29*

Main Reason For Not Connecting To The Internet	2003 %	2002 %
Internet could not assist the business in any way	28	(30)
Content and uses of the Internet are not relevant to the work the company carries out	24	(28)
Lack of knowledge about the equipment needed and how to use it	10	(7)
Security fears		(4)
Cost of the equipment	3	(4)
Call/subscription costs	-	(2)
Other	24	(17)
Don't know	10	

Likelihood Of Connecting In The Next 12 Months

	2003 %	2002 %
Very likely	21	13
Quite likely	21	20
Rather unlikely	14	13
Very unlikely	41	54
Don't know	3	

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* Caution: Small base size
() = 2002 figures