

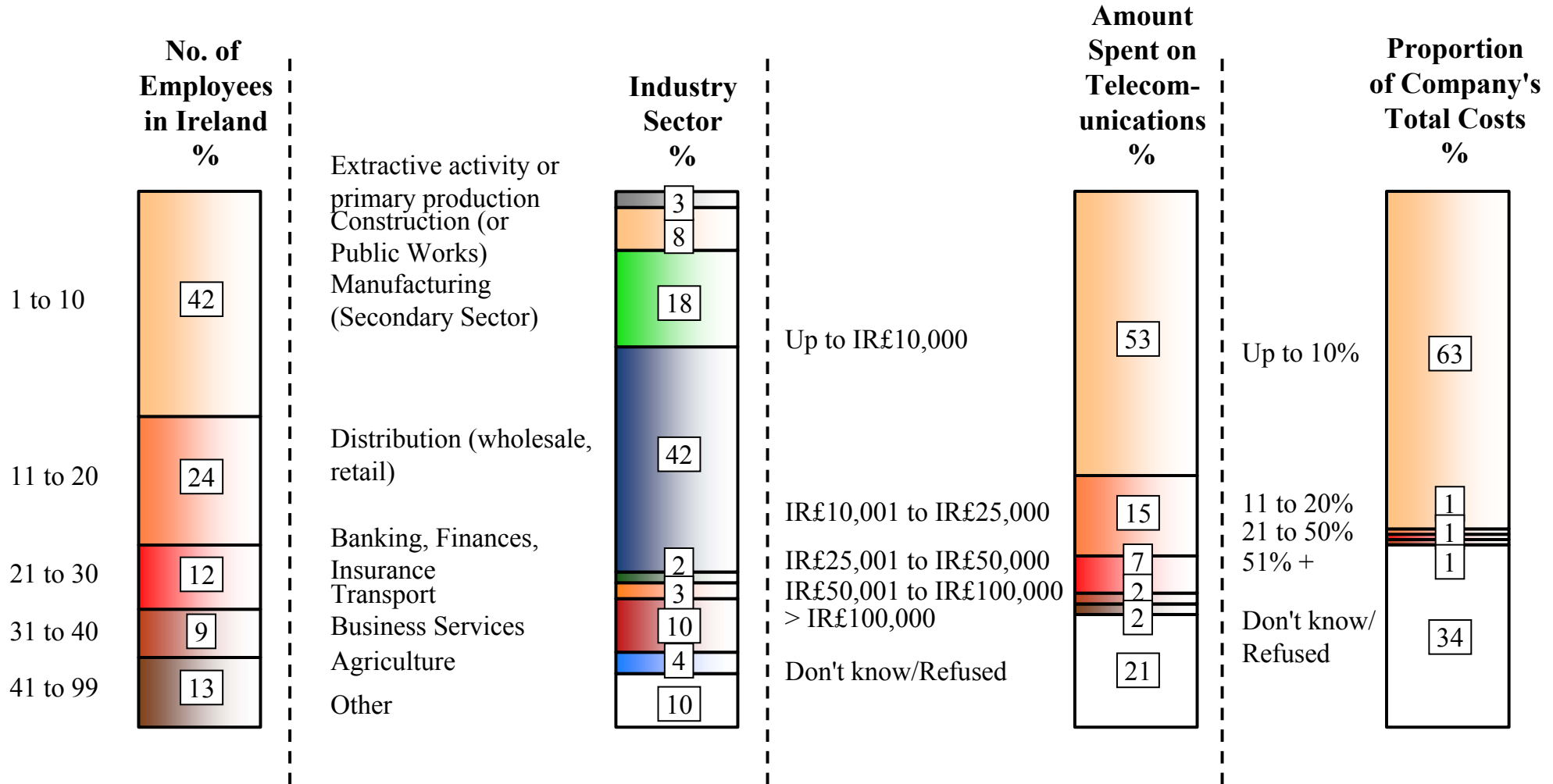


## SME TELECOMMUNICATIONS SERVICES SURVEY

**Irish  
Marketing  
Surveys**

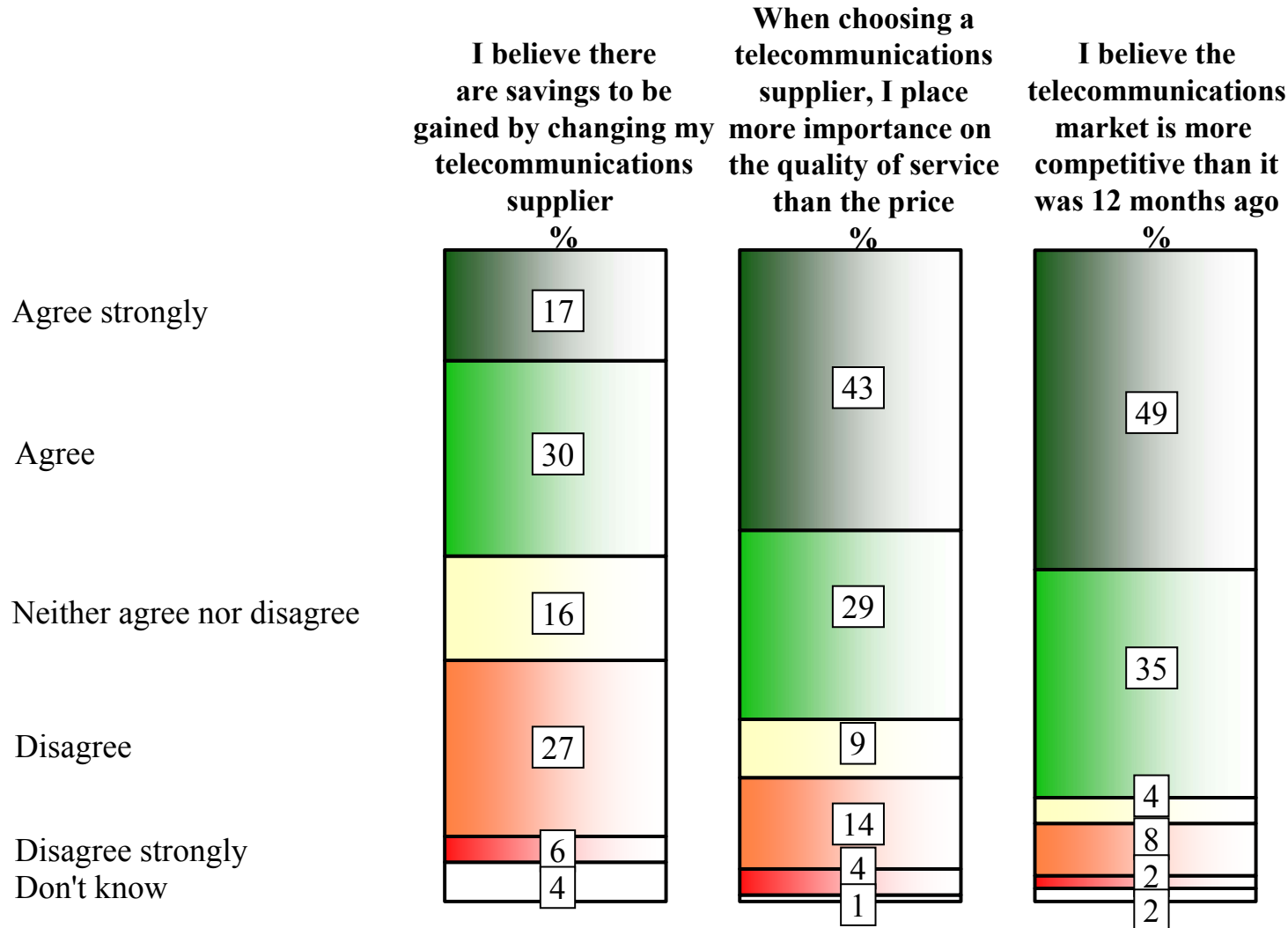
# COMPANY PROFILE

Base: All Respondents (200)



# GENERAL ATTITUDES TO TELECOMMUNICATIONS

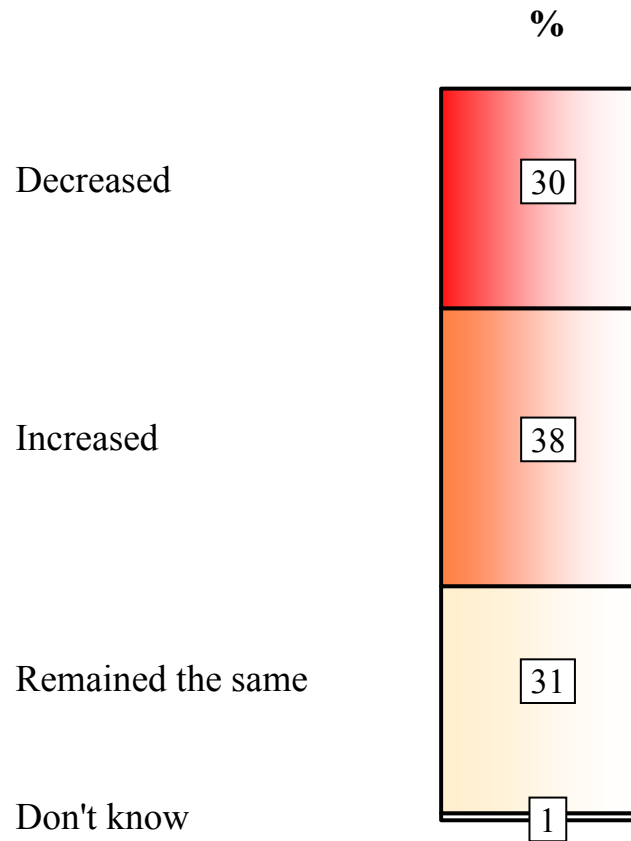
Base: All Respondents (200)



Q. How strongly do you agree or disagree with each of the following statements?

# TELECOMMUNICATION COSTS

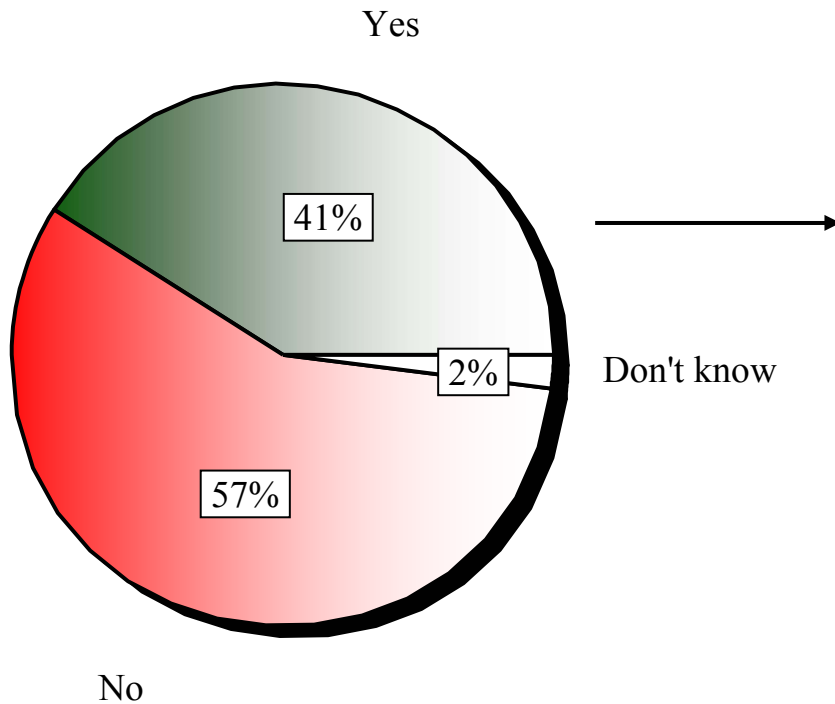
Base: All Respondents (200)



Q. In your opinion, over the last 12 months has your company's overall telecommunications costs.....?

# FUTURE INVESTMENT IN TELECOMMUNICATIONS

Base: All Respondents (200)

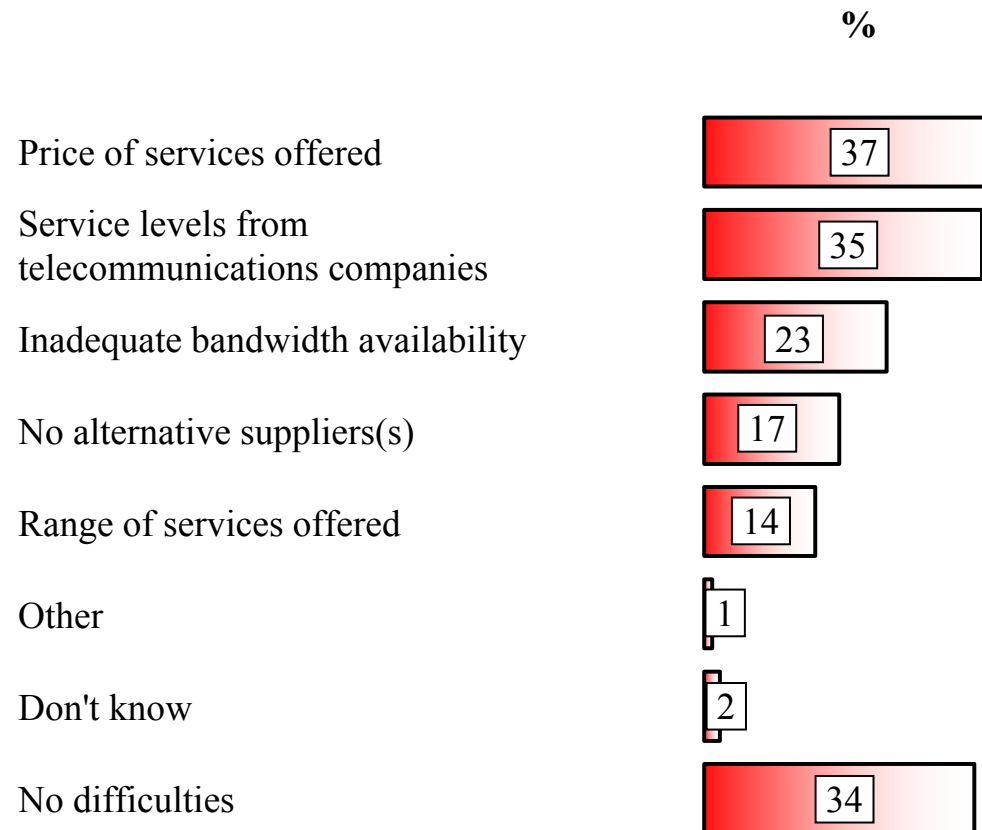


Services likely to invest in	Base:	(83) %
Internet/Web development		82
Mobile telephony		57
Fixed ISDN telephone line		48
DSL (Digital Subscriber Lines)		20
Leased line(s)		18
New phone system/upgrading existing system		6
More computers/hardware		5
Other		2
Don't know		2

- Q. Does your company intend to invest more in telecommunications devices/services or e-commerce in the coming 12 months?
- Q. Will you be investing in any or all of the following.....?

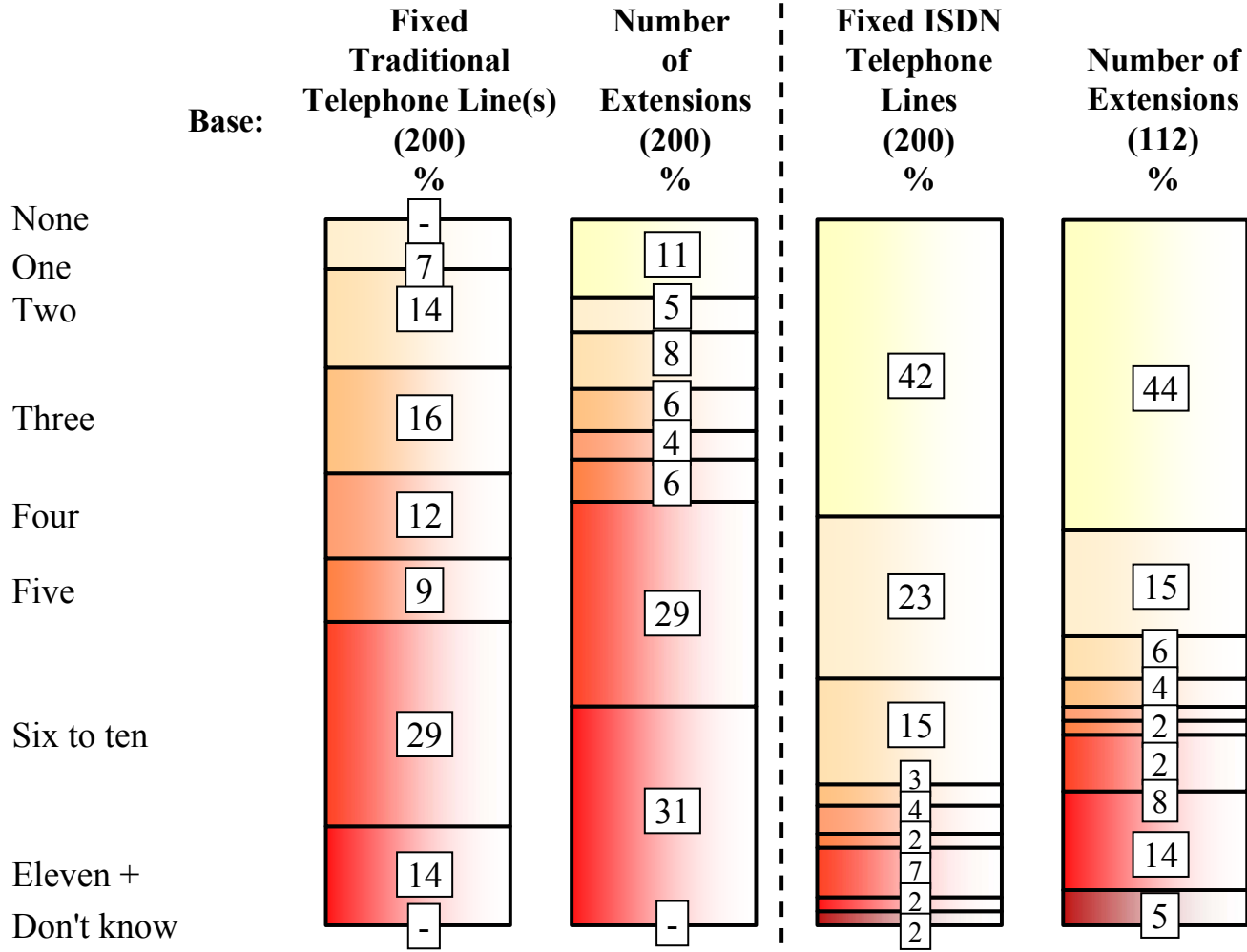
## DIFFICULTIES WITH SERVICES TO POINTS OF OPERATION

Base: All Respondents (200)



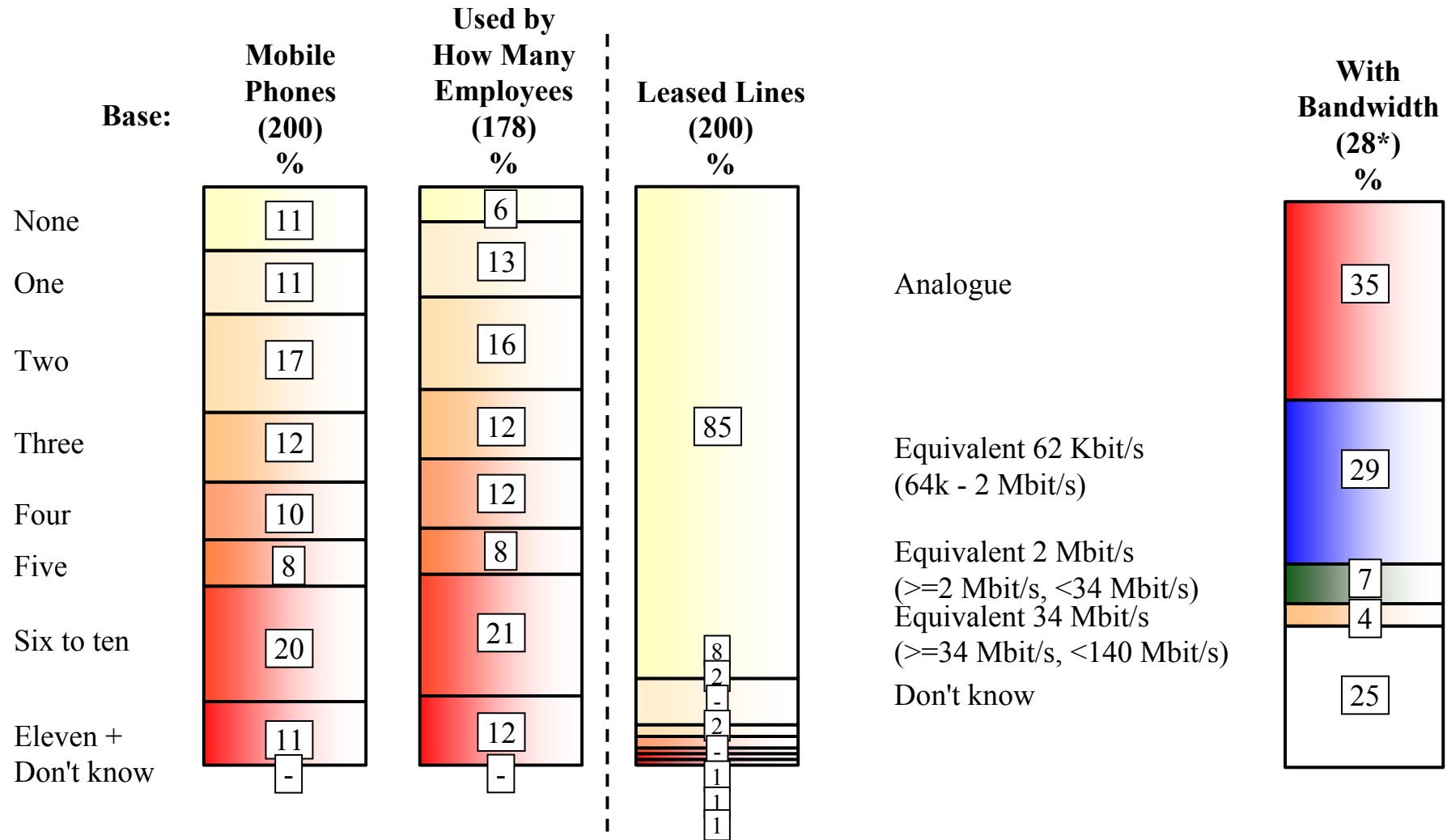
Q. In your opinion, in terms of telecommunications devices/services, what are the major difficulties, if any, with the services to your points of operation?

# NUMBER OF TELECOMMUNICATION DEVICES OR SERVICES OWNED - I



Q. How many of the following devices or services does your company have?

# NUMBER OF TELECOMMUNICATION DEVICES OR SERVICES OWNED - II



Q. How many of the following devices or services does your company have?

\*Caution: Small Base Size



## SUPPLIERS USED FOR DIFFERENT CALL TYPES

Base: All Respondents (200)

www.imsl.ie

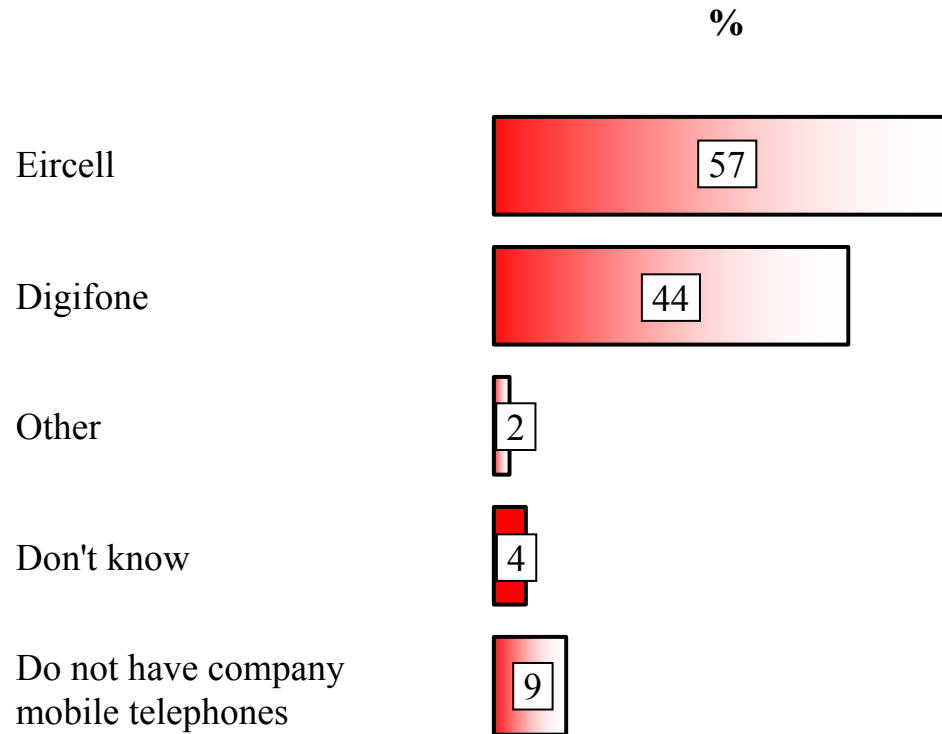
	Local Landline Telephone Calls %	National Landline Telephone Calls %	International Landline Telephone Calls %	Leased Lines %	Fixed ISDN Telephone Lines %
Eircom	84	81	77	12	49
Other Operators	21	22	22	5	6
Don't know	-	2	3	2	2
Not applicable	-	-	3	83	44

Q. \*Who is your company's supplier for ....?

\* note: Respondents may have mentioned more than one supplier

## COMPANY'S SUPPLIER FOR MOBILE TELEPHONE CALLS

Base: All Respondents (200)

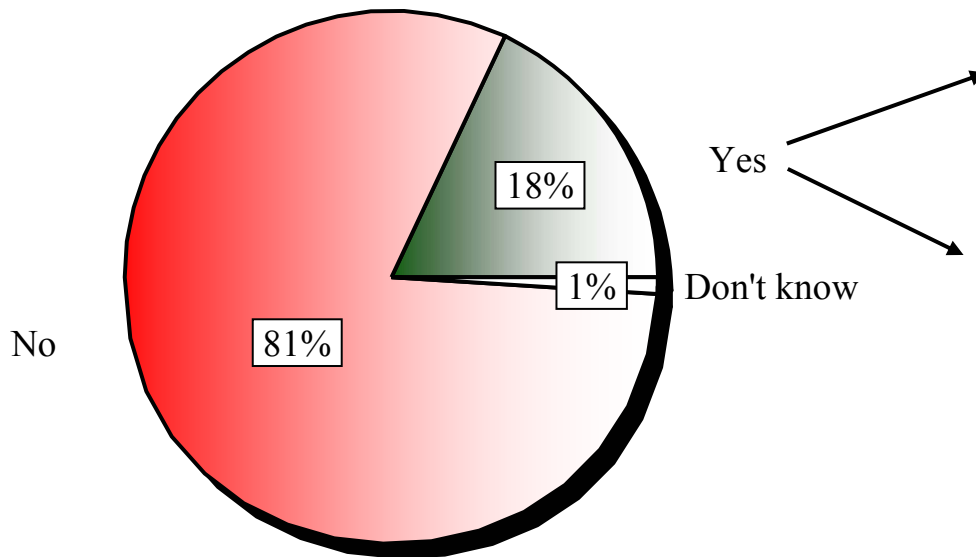


Q. \*Who is your company's supplier for your mobile telephone calls?

\* note: Respondents may have mentioned more than one supplier

## SWITCHED SUPPLIER FOR LOCAL LANDLINE TELEPHONE CALLS IN PAST 12 MONTHS

Base: All Respondents (200)



Main reason(s) for switching	
<b>Base:</b>	<b>(37*)</b>
	%
Cheaper - cost savings	68
Poor service - sought better service	27
Other	8

Difficulties encountered	
<b>Base:</b>	<b>(37*)</b>
	%
None	81
Service levels were poor/inadequate	11
Poor customer service	5
Other	3

- Q. Have you switched supplier for any of the following services in the past 12 months?  
 Q. What were your main reasons for switching your supplier of ...?  
 Q. What if any difficulties did you encounter when switching to another supplier?

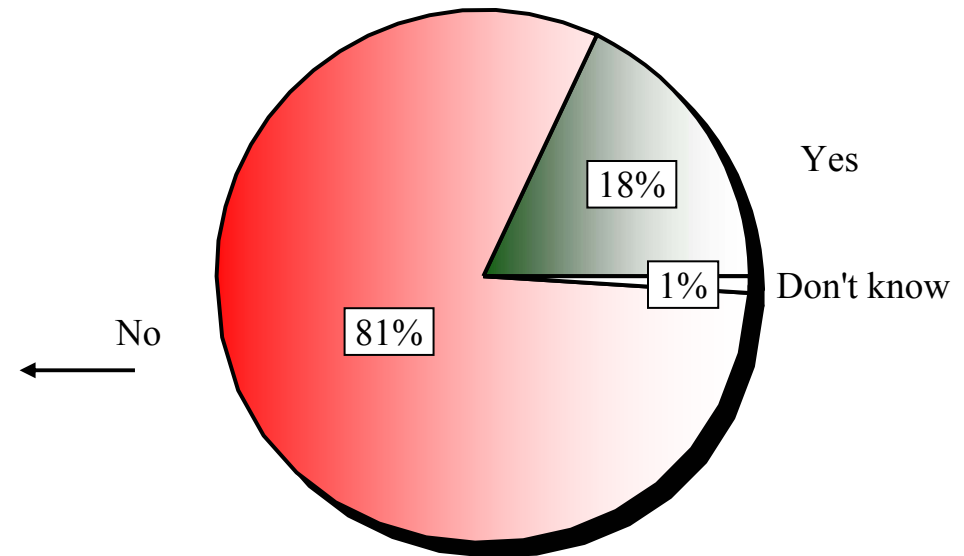
\*Caution: Small Base Size

## SWITCHED SUPPLIER FOR LOCAL LANDLINE TELEPHONE CALLS IN PAST 12 MONTHS (cont'd)

Base: All Respondents (200)

### Reason(s) why not considered changing supplier

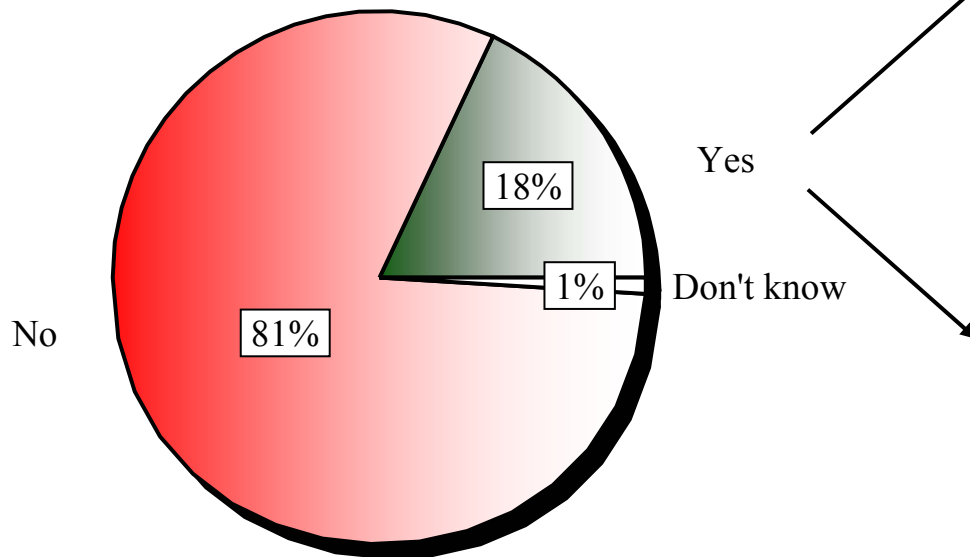
Base:	(162)
	%
Are satisfied with current level of service	56
Believe getting the best value for money with current supplier	42
Range of services supplied by existing supplier	15
No alternative carrier has approached you	6
Not aware of the options open to you	5
Lack of information	5
Lack of price transparency	4
Too busy - haven't got round to it	3
Eircom shareholder - loyal to Eircom	3
Deals not worth it	3
Currently changing	2
Lazy - couldn't be bothered	2
Wait and see - let prices settle	1
Unwilling to risk change - uncertain	1
Other	1
Don't know	1



- Q. Have you switched supplier for any of the following services in the past 12 months?  
Q. Why have you not considered changing your supplier of ...?

## SWITCHED SUPPLIER FOR NATIONAL LANDLINE TELEPHONE CALLS IN PAST 12 MONTHS

Base: All Respondents (200)



Main reason(s) for switching	
<b>Base:</b>	<b>(37*)</b>
	%
Cheaper - cost savings	62
Poor service - sought better service	22
Dislike Eircom - previous supplier	8
Other	8

Difficulties encountered	
<b>Base:</b>	<b>(37*)</b>
	%
None	81
Service levels were poor/inadequate	8
Poor customer service	3
Other	8

- Q. Have you switched supplier for any of the following services in the past 12 months?
- Q. What were your main reasons for switching your supplier of ... ?
- Q. What if any difficulties did you encounter when switching to another supplier?

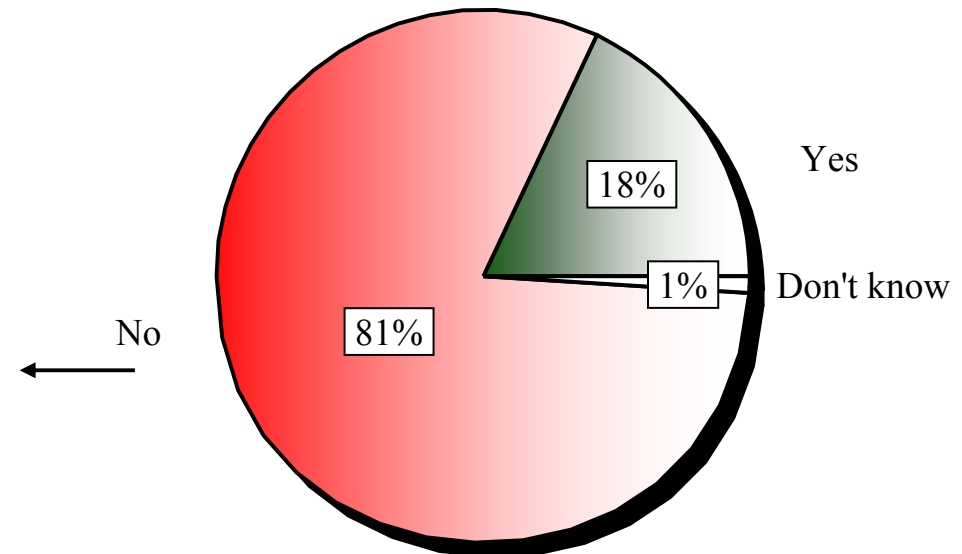
\*Caution: Small Base Size

## SWITCHED SUPPLIER FOR NATIONAL LANDLINE TELEPHONE CALLS IN PAST 12 MONTHS(Cont'd)

Base: All Respondents (200)

### Reason(s) why not considered changing supplier

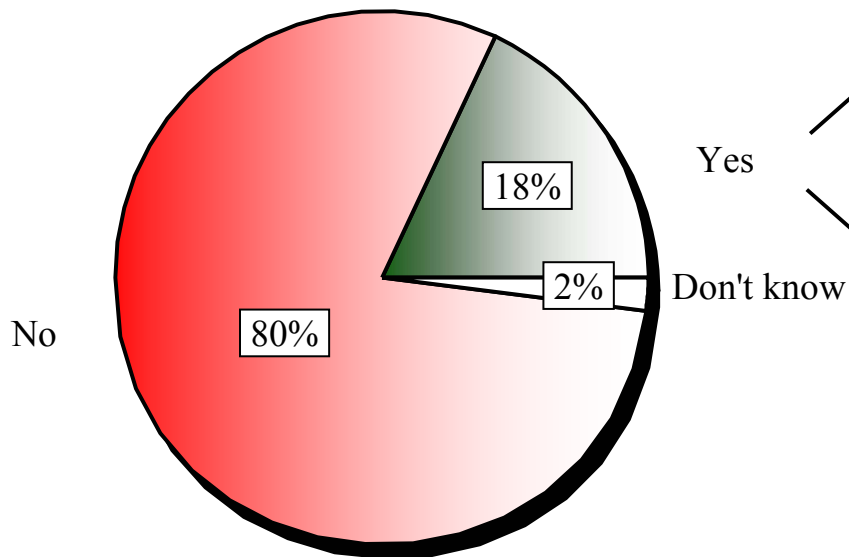
Base:	(162)
	%
Are satisfied with current level of service	54
Believe getting the best value for money with current supplier	40
Range of services supplied by existing supplier	15
Lack of information	6
Deals not worth it	6
No alternative carrier has approached you	5
Not aware of the options open to you	5
Lack of price transparency	3
Currently changing	2
Too busy - haven't got round to it	2
Eircom shareholder - loyal to Eircom	1
Don't know	5



- Q. Have you switched supplier for any of the following services in the past 12 months?  
Q. Why have you not considered changing your supplier of ...?

# SWITCHED SUPPLIER FOR INTERNATIONAL LANDLINE TELEPHONE CALLS IN PAST 12 MONTHS

Base: All Respondents (200)



Main reason(s) for switching	
<b>Base:</b>	<b>(36*)</b>
	%
Price - cost reduction	67
Poor service - sought better service	19
Dislike Eircom - previous supplier	6
Other	8

Difficulties encountered	
<b>Base:</b>	<b>(36*)</b>
	%
None	83
Service levels were poor/inadequate	8
Poor customer service	3
Other	6

- Q. Have you switched supplier for any of the following services in the past 12 months?
- Q. What were your main reasons for switching your supplier of ...?
- Q. What if any difficulties did you encounter when switching to another supplier?

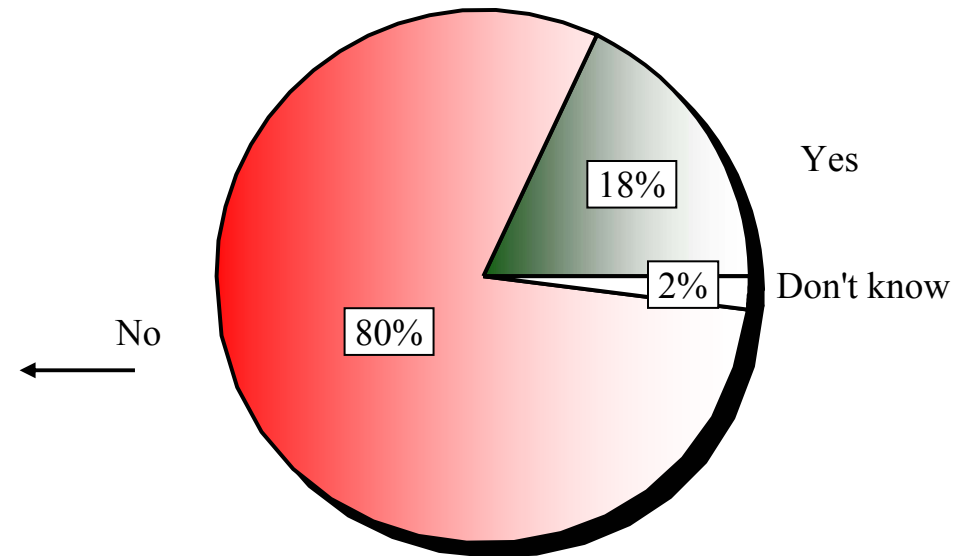
\*Caution: Small Base Size

## SWITCHED SUPPLIER FOR INTERNATIONAL LANDLINE TELEPHONE CALLS IN PAST 12 MONTHS (Cont'd)

Base: All Respondents (200)

### Reason(s) why not considered changing supplier

Reason(s)	Count	%
Base:	(160)	
Are satisfied with current level of service	58	
Believe getting the best value for money with current supplier	36	
Range of services supplied by existing supplier	14	
No alternative carrier has approached you	6	
Lack of information	5	
Deals not worth it	4	
Not aware of the options open to you	4	
Lack of price transparency	3	
Too busy - haven't got round to it	2	
Lazy couldn't be bothered	1	
Eircom shareholder - loyal to Eircom	1	
Currently changing	1	
Other	3	
Don't know	4	

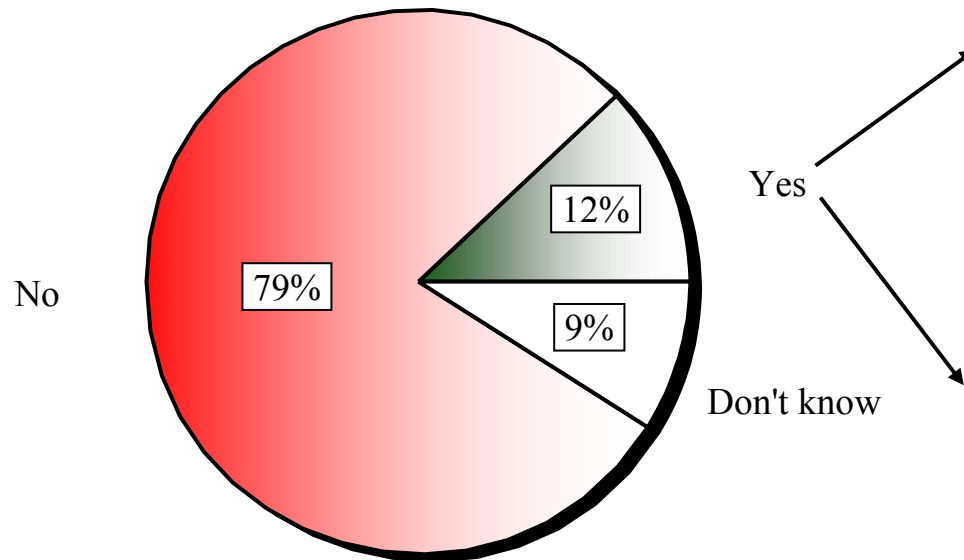


- Q. Have you switched supplier for any of the following services in the past 12 months?  
Q. Why have you not considered changing your supplier of ...?



# SWITCHED SUPPLIER FOR MOBILE CALLS IN PAST 12 MONTHS

Base: All Respondents (200)



Main reason(s) for switching	
<b>Base:</b>	<b>(25*)</b>
	%
Poor service - sought better service	32
Coverage - reception	28
The phone company was liquidated/closed	28
Price/cost reductions	20
Wanted to upgrade - new handset	4
Other	-

Difficulties encountered	
<b>Base:</b>	<b>(25*)</b>
	%
None	68
Service levels were poor/inadequate	20
Poor customer service	16

\*Caution: Small Base Size

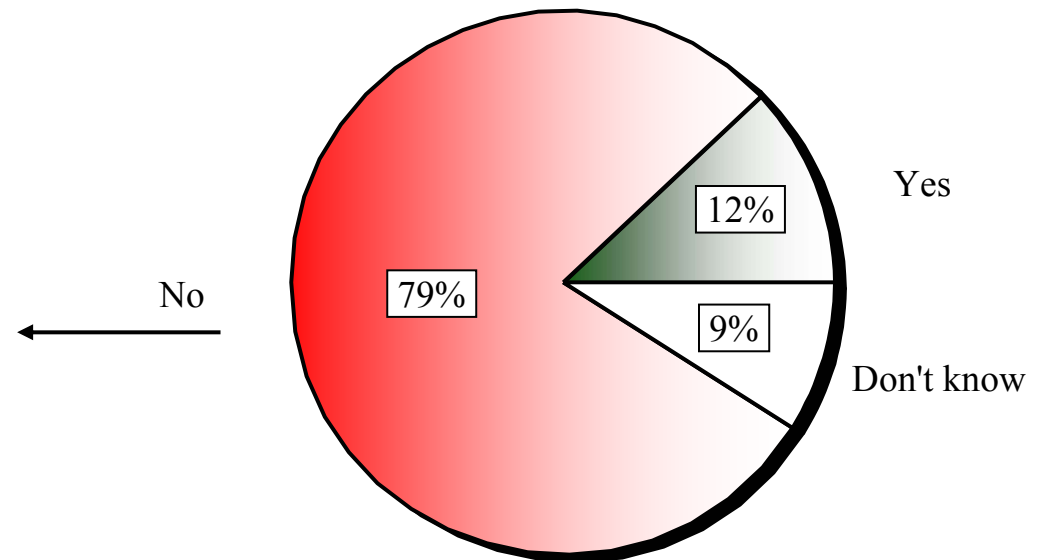
- Q. Have you switched supplier for any of the following services in the past 12 months?
- Q. What were your main reasons for switching your supplier of ...?
- Q. What if any difficulties did you encounter when switching to another supplier?

## SWITCHED SUPPLIER FOR MOBILE CALLS IN PAST 12 MONTHS (Cont'd)

Base: All Respondents (200)

### Reason(s) why not considered changing supplier

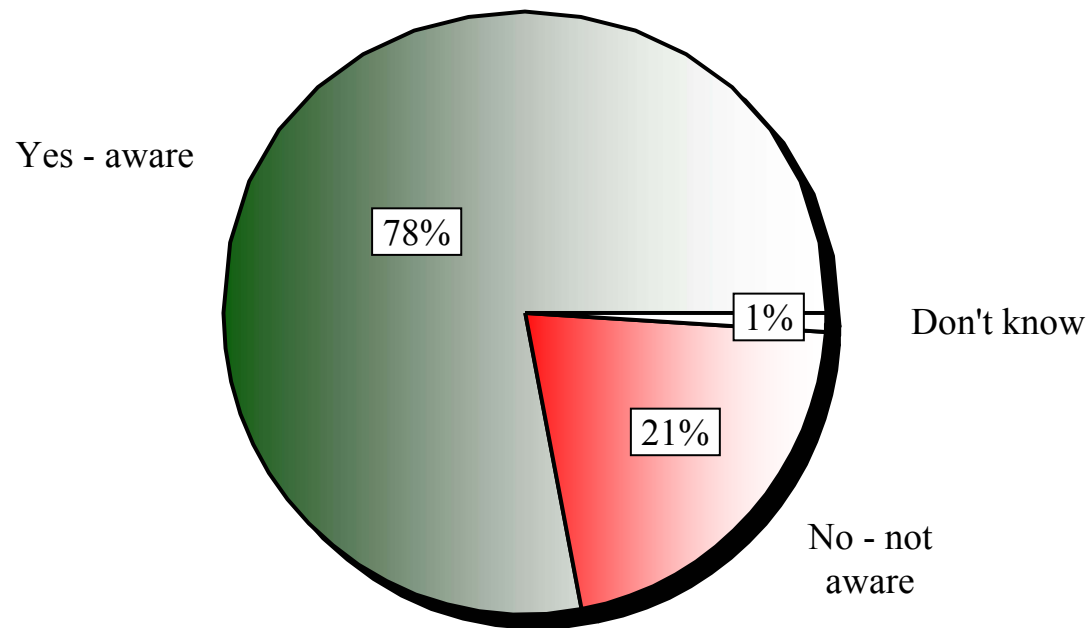
Reason(s)	Count	%
Are satisfied with current level of service	55	27.5%
Believe getting the best value for money with current supplier	30	15%
Range of services supplied by existing supplier	15	7.5%
Am satisfied with current supplier	12	6%
Deals not worth it	8	4%
No alternative carrier has approached you	4	2%
Lack of price transparency	3	1.5%
Lack of information	3	1.5%
We don't use mobiles	3	1.5%
Not aware of the options open to you	3	1.5%
Lazy - couldn't be bothered	2	1%
Too busy - haven't got round to it	2	1%
Wait and see - let prices settle	1	0.5%
Other	3	1.5%
Don't know	1	0.5%



- Q. Have you switched supplier for any of the following services in the past 12 months?  
Q. Why have you not considered changing your supplier of ...?

## AWARENESS OF CARRIER PRE SELECTION

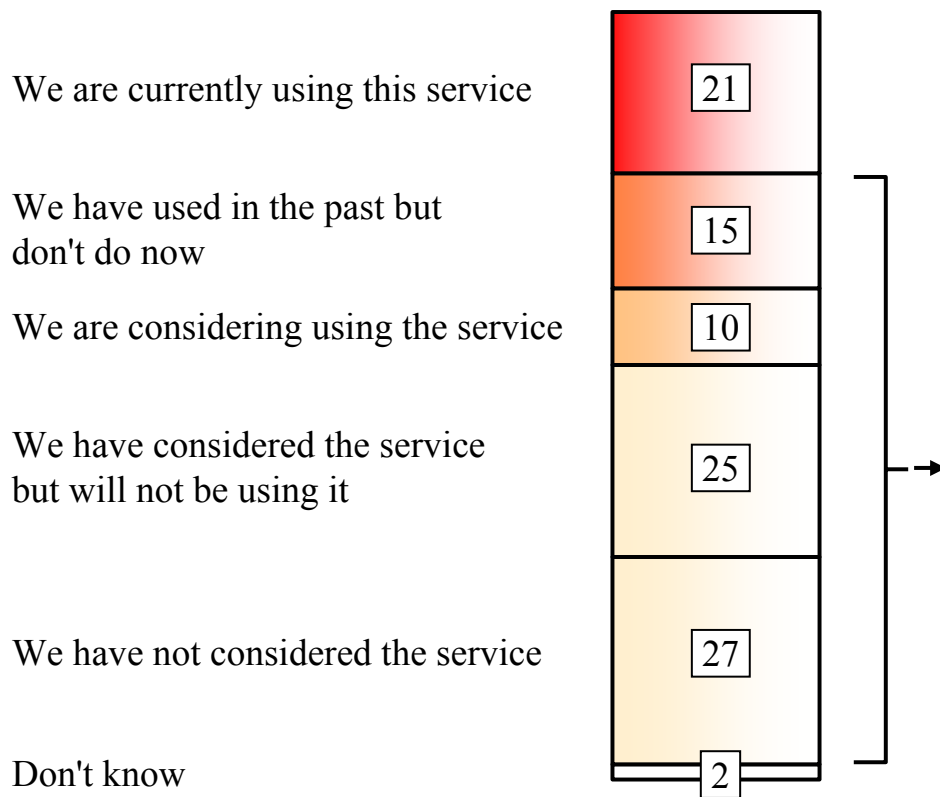
Base: All Respondents (200)



Q. Were you aware that you can now select an operator other than Eircom to carry your calls (Carrier Pre Selection)?

## USE OF CARRIER PRE SELECTION

Base: All Aware Of Service (157)

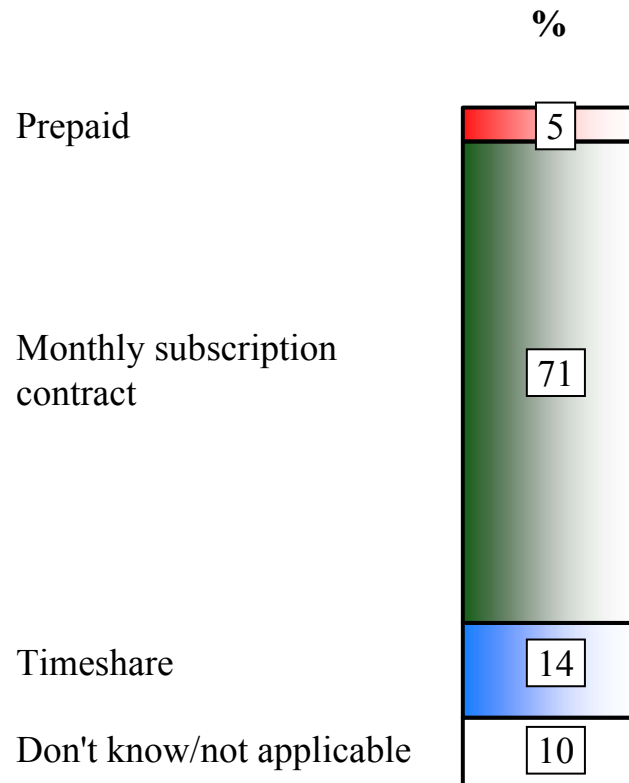


Reason(s) why don't currently use a Carrier Pre Selection service	Count
<b>Base:</b>	<b>(121)</b>
	<b>%</b>
Satisfied with what we're using	23
Happy with Eircom/Better deal from Eircom	18
Don't use telecommunications that much/no need for it	12
Too busy/Haven't got round to it	10
Haven't considered it/Not bothered	7
We had a lot of problems when we had it before	7
Cost	5
Dissatisfied with service from current supplier	4
Not worth our while	4
Lack of knowledge/Information	3
Currently considering it	2
It's too much hassle to change over	1
Others	3
No reason/don't know	7

- Q. Which of these best describes your company's situation on the use of Carrier Pre Selection (CPS)?
- Q. Why don't you currently use a Carrier Pre Selection (CPS) Service?

## MOBILE PHONE PACKAGE USED

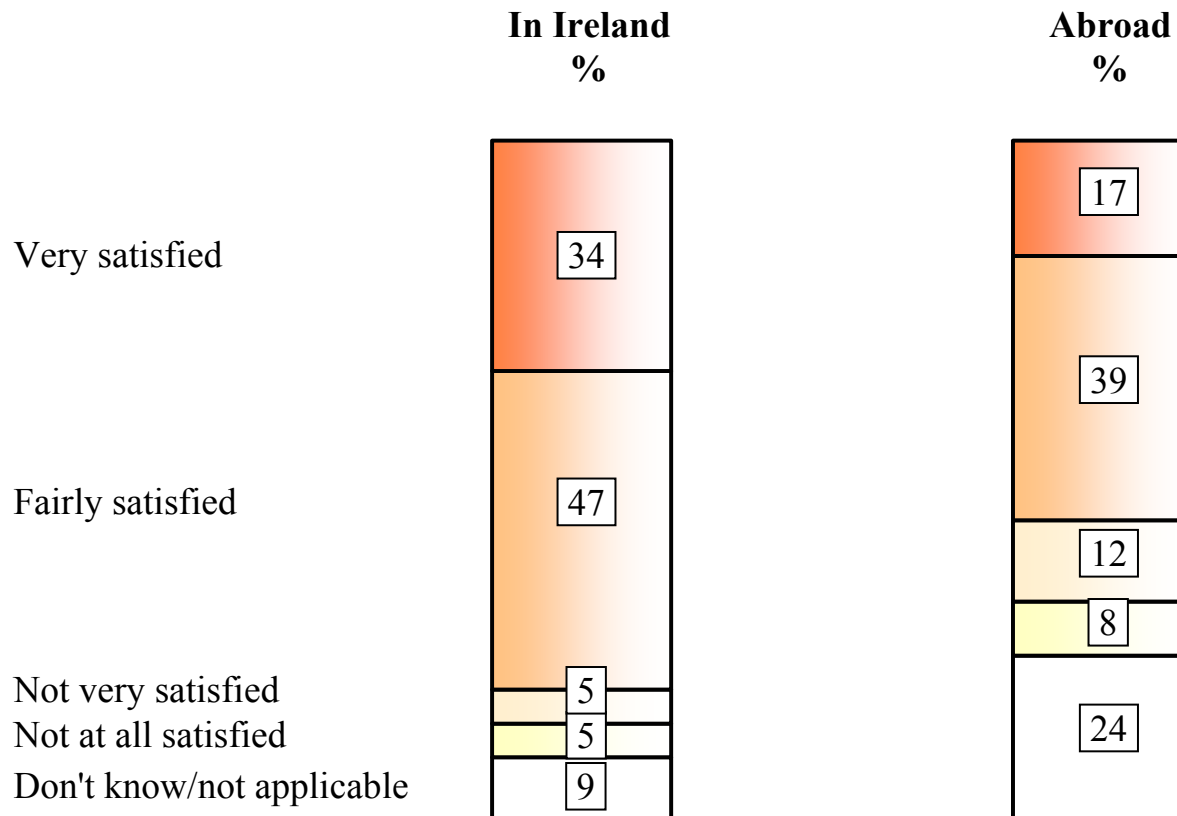
Base: All Respondents (200)



Q. Which of the following best describes the mobile phone packages your company uses?

## SATISFACTION WITH INFORMATION AVAILABLE ON CALL CHARGES

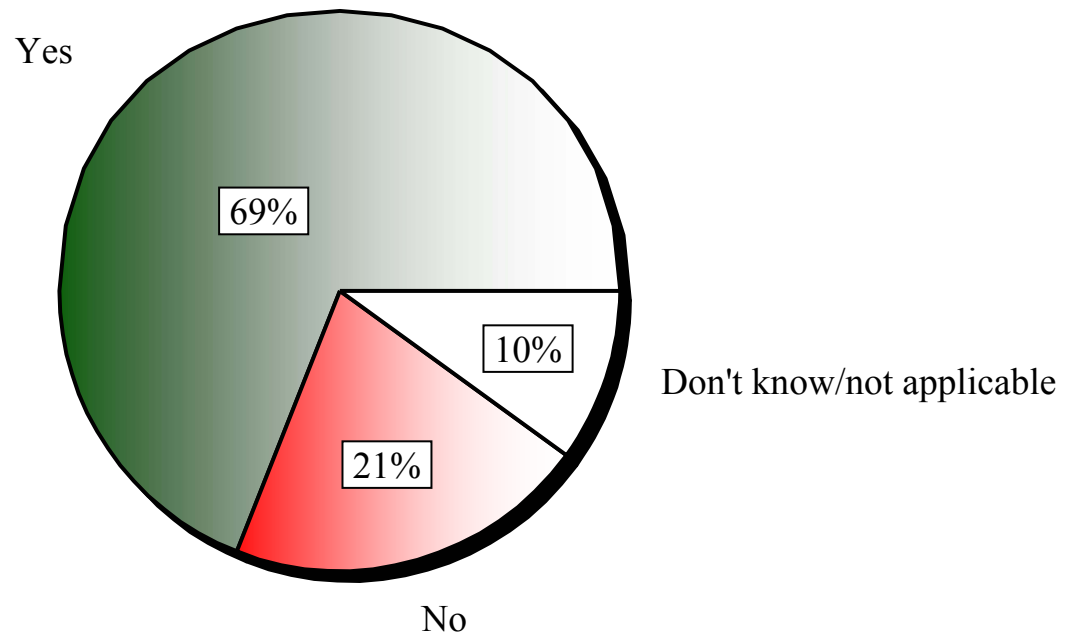
Base: All Respondents (200)



- Q. How satisfied is your company with the information available on call charges for using your mobile in Ireland?  
 Q. How satisfied is your company with the information available on call charges for using your mobile abroad?

## AWARENESS OF DIFFERENCE IN COST OF CALLING ANOTHER MOBILE NETWORK

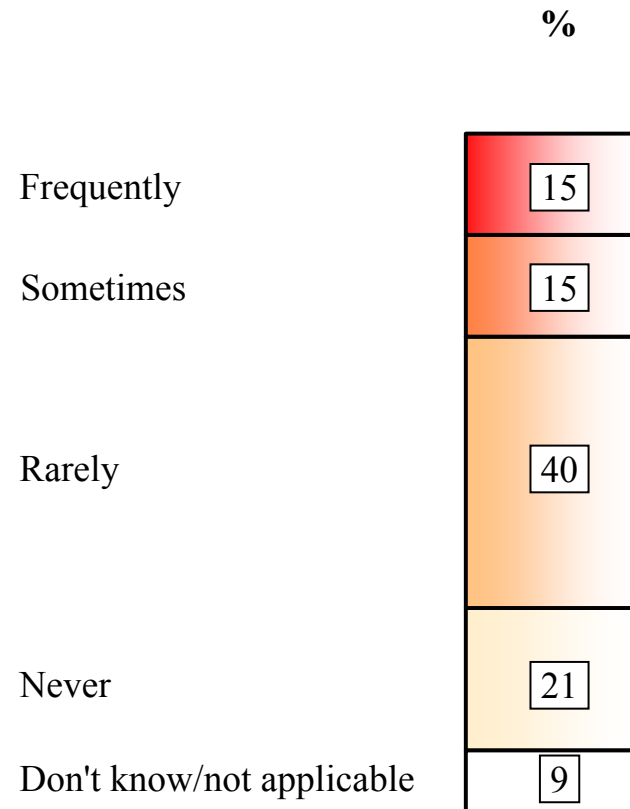
Base: All Respondents (200)



Q. Are you aware of the difference in the cost of calling *another* mobile network, from your mobile phone, rather than calling the same mobile network?

## MOBILE PHONE USE ABROAD

Base: All Respondents (200)

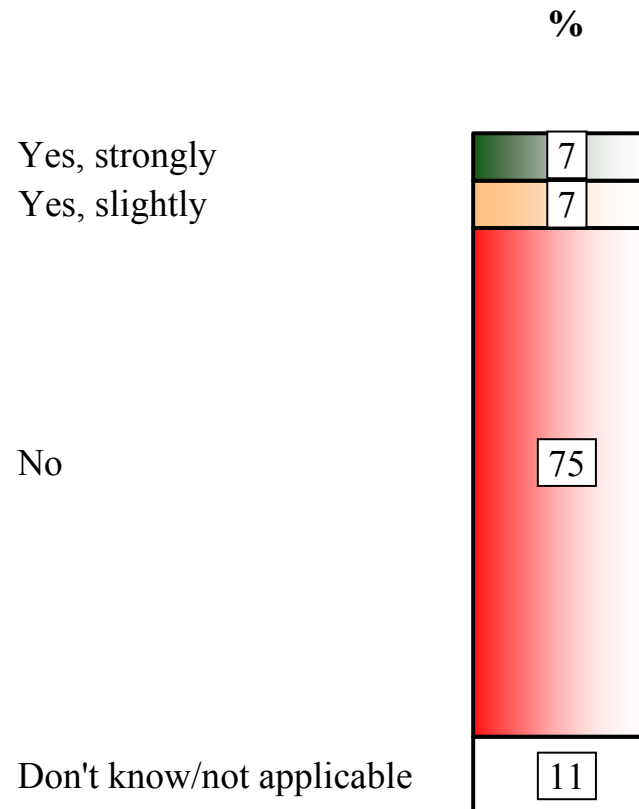


Q. How often, if at all, are your company's mobile phones used abroad for work purposes?



## ENCOURAGE TEXT MESSAGING

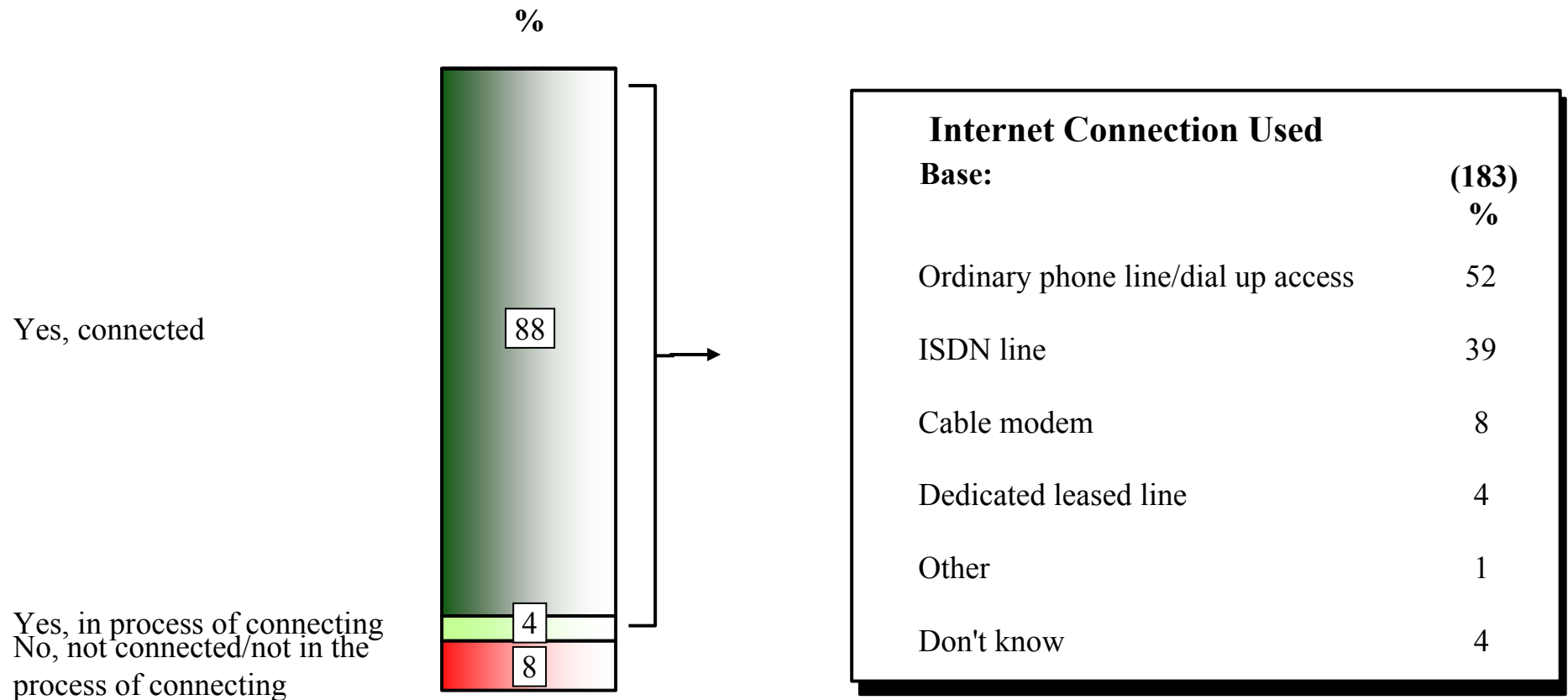
Base: All Respondents (200)



Q. Does your company encourage its staff to use text messaging where possible rather than ring colleagues?

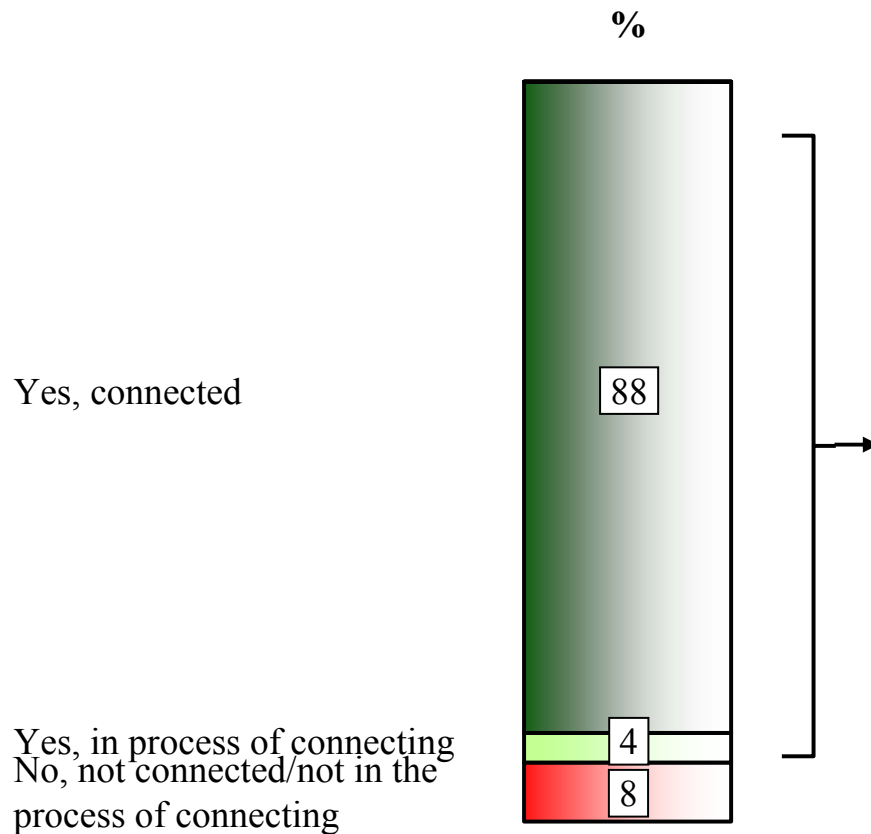
# INTERNET USE - I

Base: All Respondents (200)



- Q. Is anyone in your company connected to the Internet or in the process of connecting to the Internet?
- Q. Which of the following does your company use to connect to the Internet?

Base: All Respondents (200)

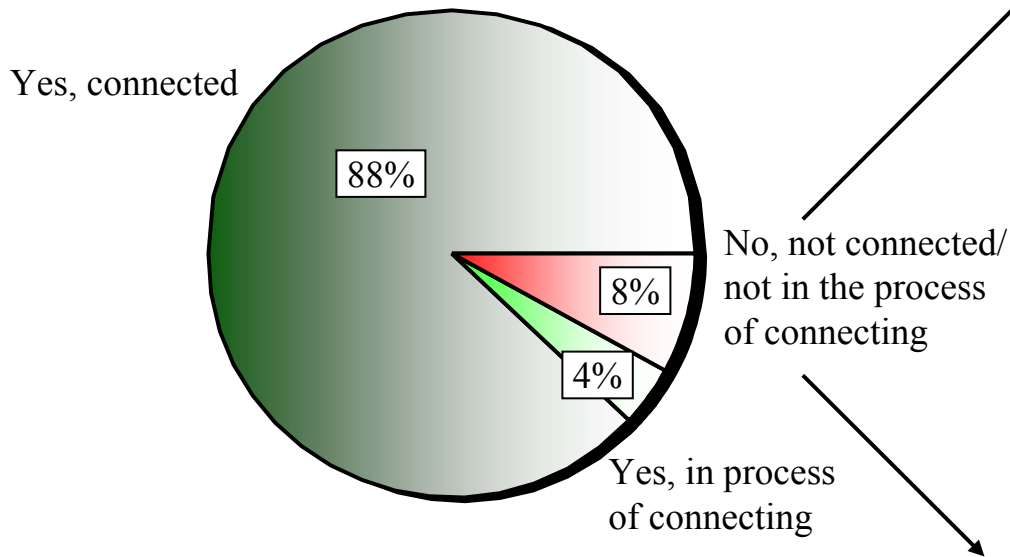


<b>Type of e-business applications</b>	
<b>Base:</b>	<b>(183)</b>
	<b>%</b>
Sourcing information from websites	84
E-mail with suppliers/customers	80
On-line banking	49
E-mail within company	45
On-line purchasing from suppliers/ orders from customers	32
On-line payments to suppliers/ from customers	25
Communicating with newsgroups	14
Video conferencing	1
Other	1
Don't know	4

- Q. Is anyone in your company connected to the Internet or in the process of connecting to the Internet?
- Q. What types of e-business applications does your company use the Internet for?

# REASONS WHY NOT CONNECTED TO THE INTERNET AND LIKELIHOOD OF CONNECTING IN NEXT 12 MONTHS

Base: All Respondents (200)



Likelihood of connecting in the next 12 months	
<b>Base:</b>	<b>(17*)</b>
	<b>%</b>
Very likely	18
Quite likely	18
Rather unlikely	11
Very unlikely	53

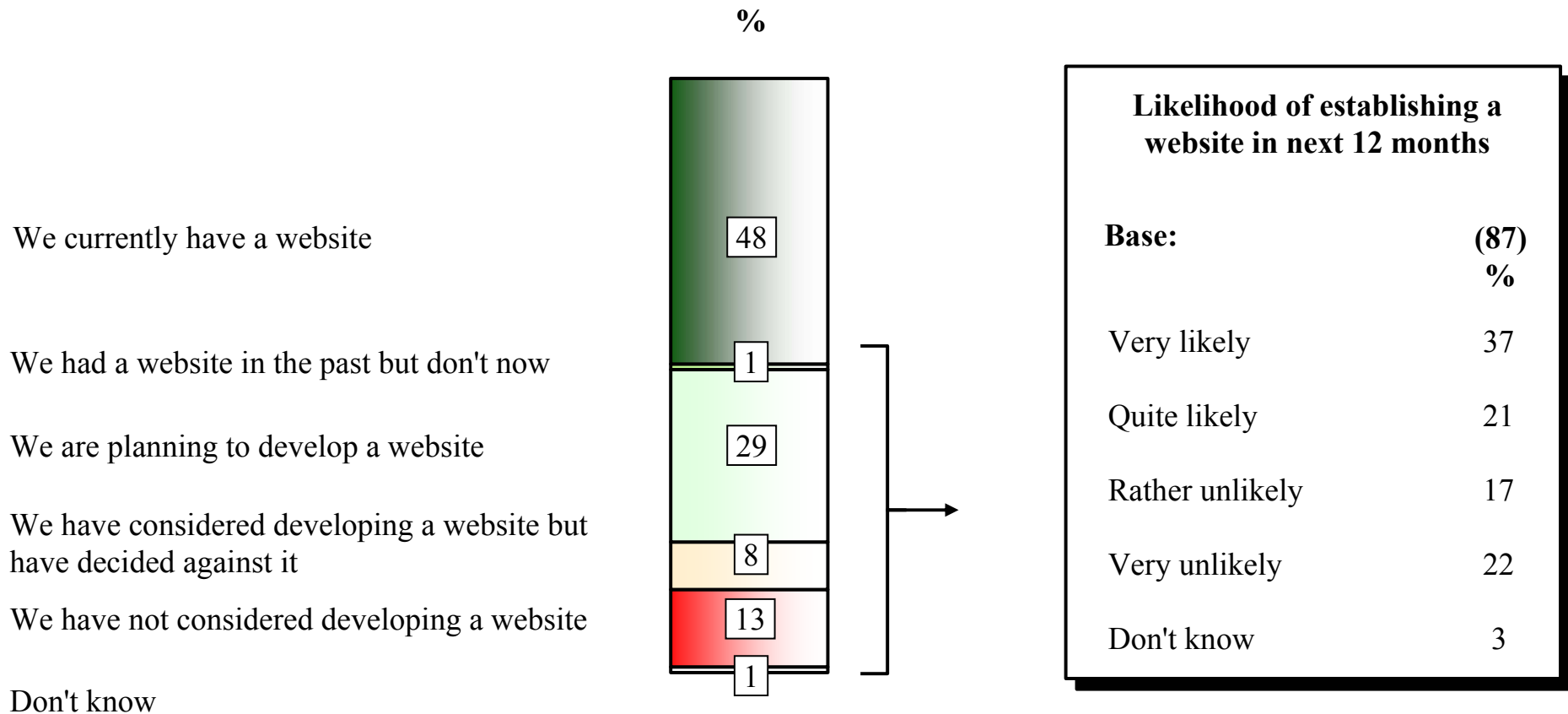
Main reason for not connecting to the Internet	
<b>Base:</b>	<b>(17*)</b>
	<b>%</b>
Content and uses of the Internet are not relevant to the work company carries out	53
Internet could not assist the business in any way	18

\*Caution: Small Base Size

- Q. Is anyone in your company connected to the Internet or in the process of connecting to the Internet?
- Q. Is your company likely to become connected to the Internet in the next 12 months?
- Q. What is the main reason your company is not connected to the Internet?

# COMPANY WEBSITE

Base: All Respondents (200)



Q. Which of these statements best describes your company's online activity?  
 Q. How likely is your company to establish a website in the next 12 months ?