



silverspan

**Australian Business Leaders
Technology Usage
May 2005**

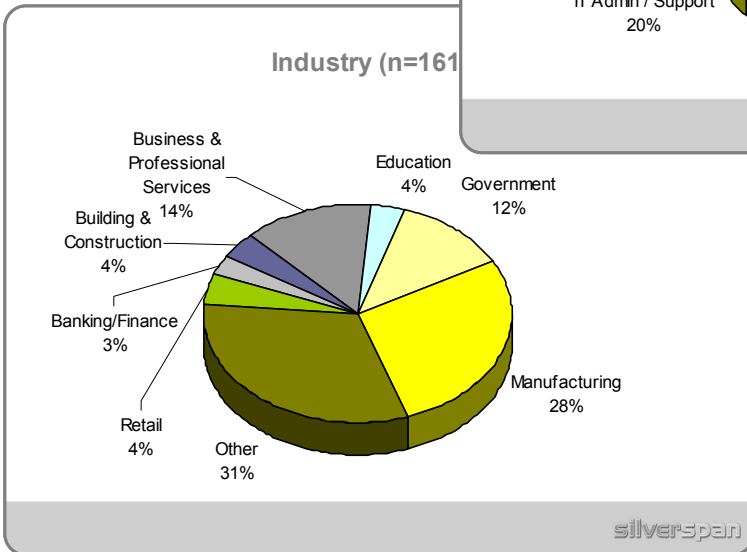
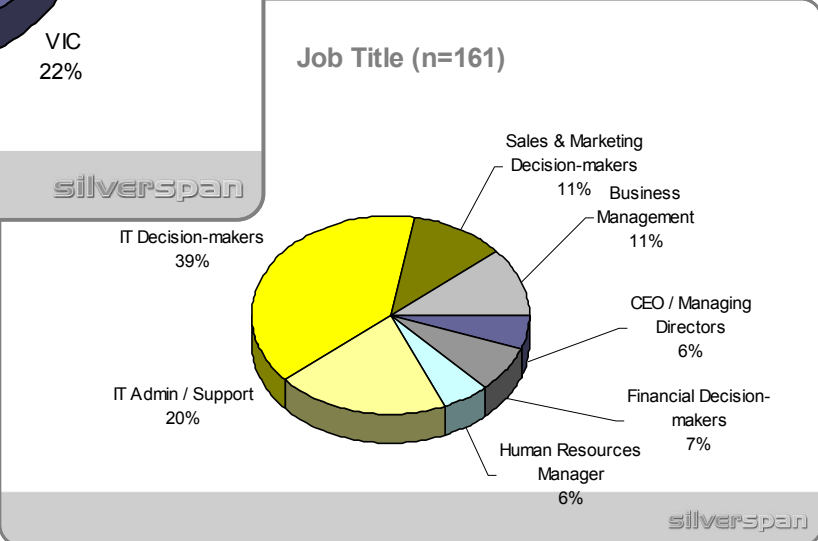
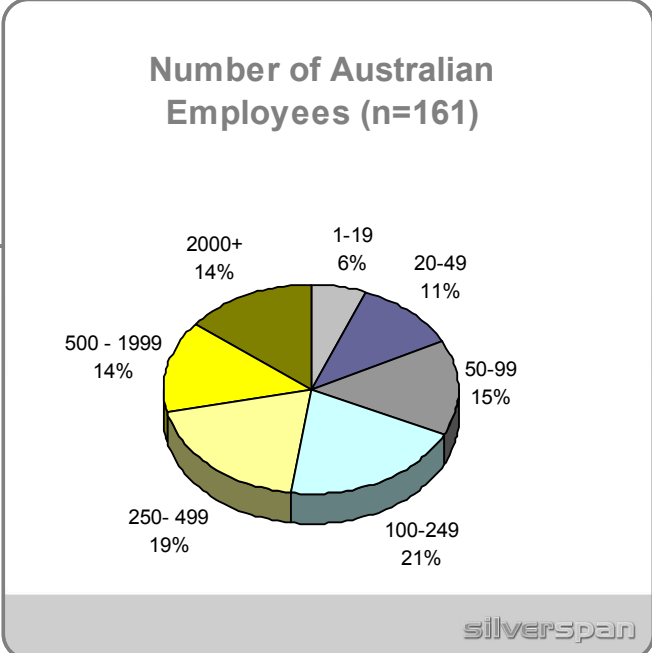
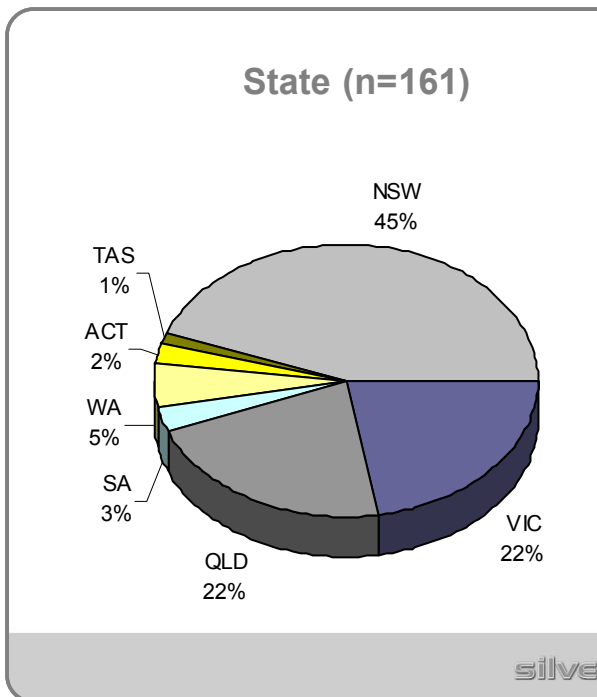
In May 2005, Silverspan conducted 161 telephone interviews, with the goal of taking a snapshot of technology usage amongst members of the Australian business community.

The following questions were asked:

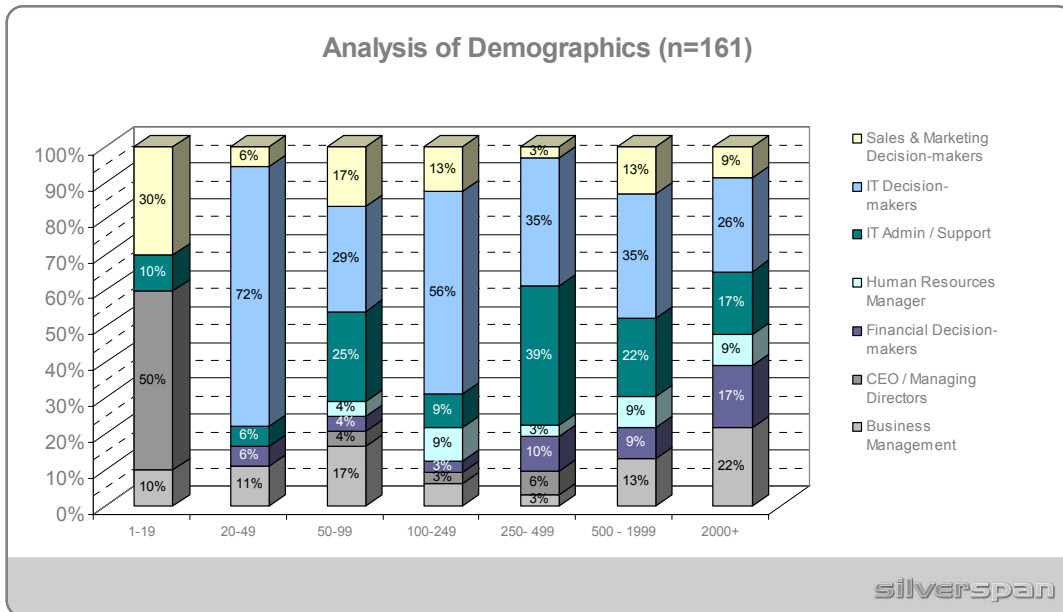
1. Have you worked from home in the last week?
2. Do you think that video conferencing is a good substitute for a face to face meeting?
3. Have you taken part in a video conference in the last month?
4. Have you purchased anything online in the last week?
5. Do you have a broadband internet service at home?
6. Do you use your home broadband service for activities other than surfing the Internet?
7. How long since your work computer was last replaced/upgraded?
8. Does your office have a wireless network / LAN?
9. Approximately how many emails do you receive at work each day?
10. And how many spam emails do you receive at work each day?
11. What do you think is the single most important factor when buying software for work?
12. Does your company block access to any internet websites at work?
13. What do you think is the single most important factor when buying a mobile phone handset for work?
14. Has your employer provided you with a mobile phone?
15. Approximately how many SMS text messages do you send each day?
16. Which IT company do you admire the most?

Opinion Poll Demographic Statistics

The opinion poll achieved a sample size of 161 completed interviews.

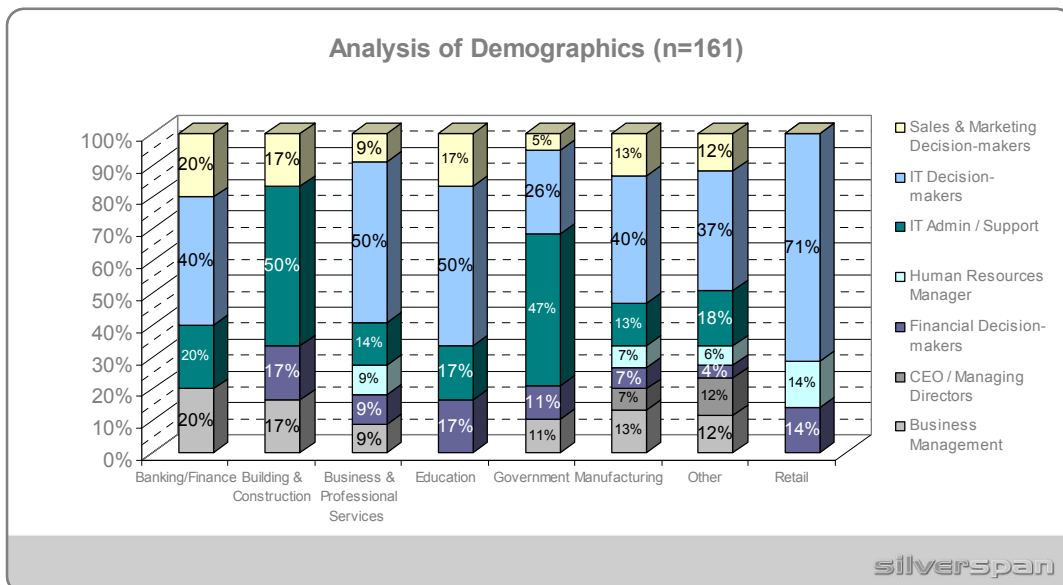


The survey was conducted in Australia. All polling was conducted via telephone interviews, with interviewees being selected from ACT, NSW, QLD, SA, TAS, VIC and WA.



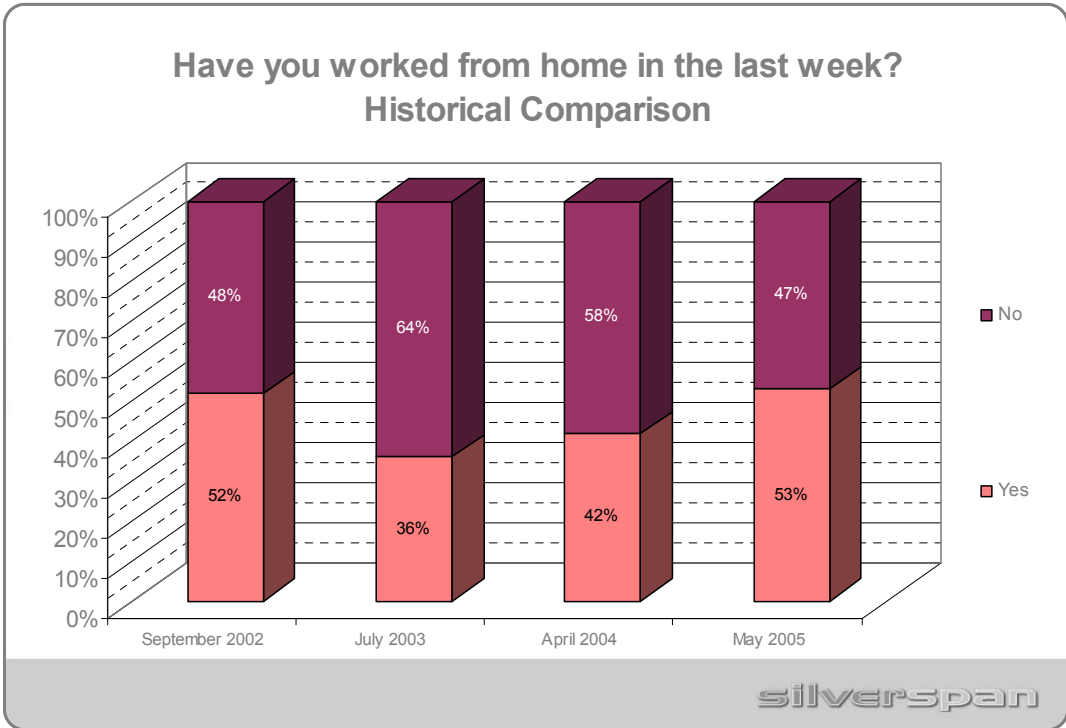
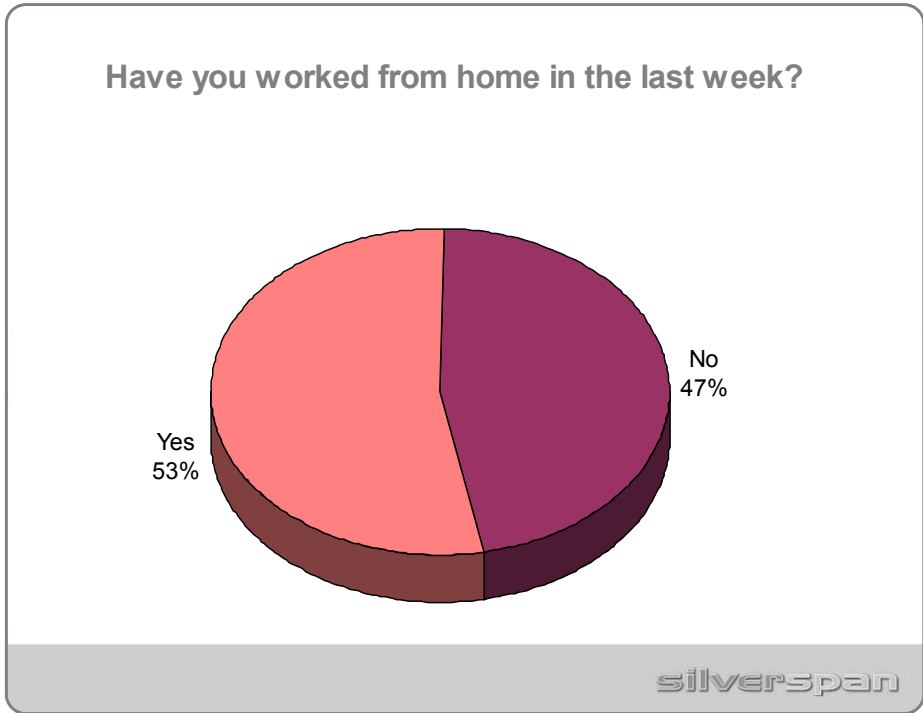
The spread of industries involved in the survey was extremely broad, and representative of the overall Australian market. This opinion poll deliberately sought to avoid interviewing people working for IT and Telecommunication sector companies.

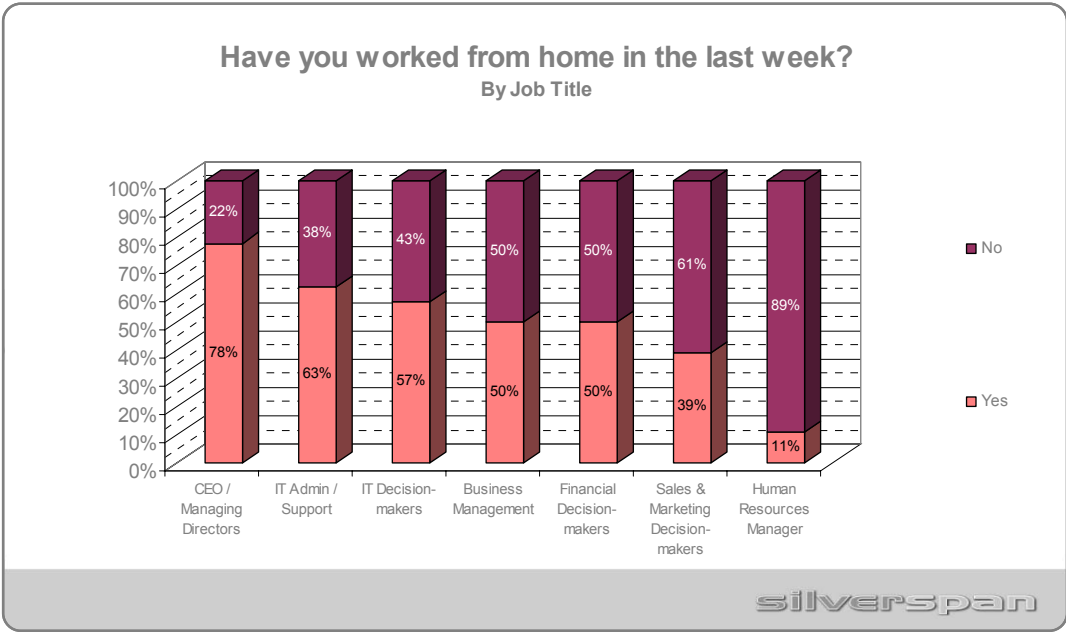
The results are grouped into seven job title categories: Business Management, CEO / Managing Directors, Financial Decision-makers, Human Resource Decision-makers, IT Admin / Support, IT Decision-makers and Sales & Marketing Decision-makers.



Q1: Have you worked from home in the last week?

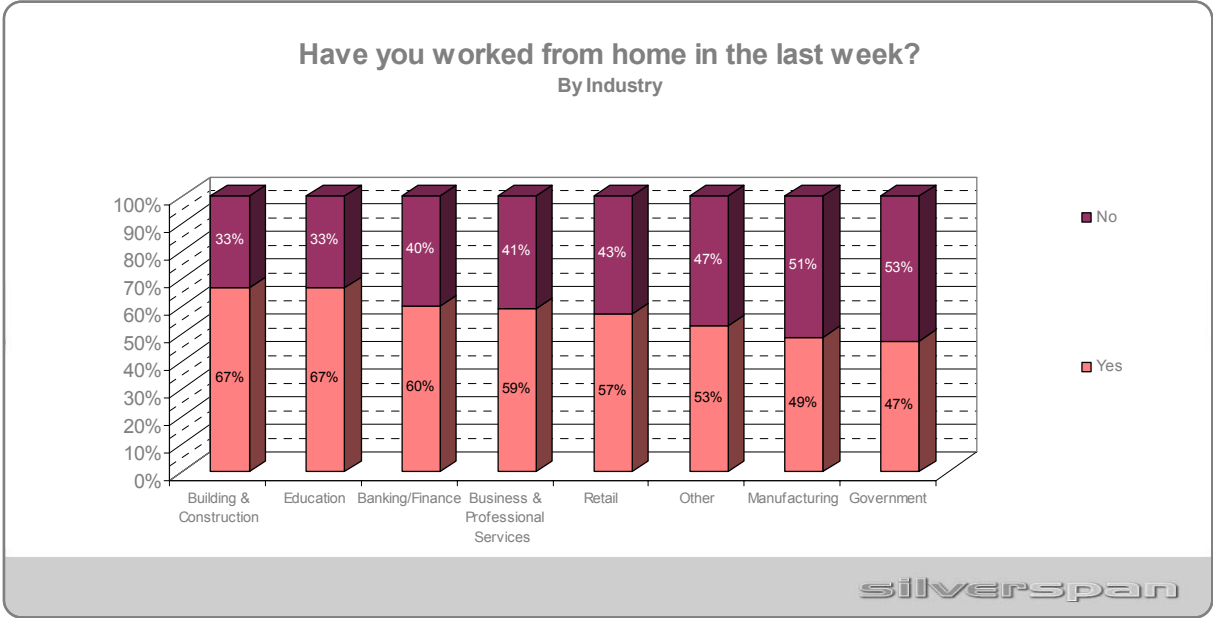
53% of those surveyed had worked from home at some time in the last week. Marking a clear rebound in the number of people working from home, this compares to a recent low of 36% in July 2003.





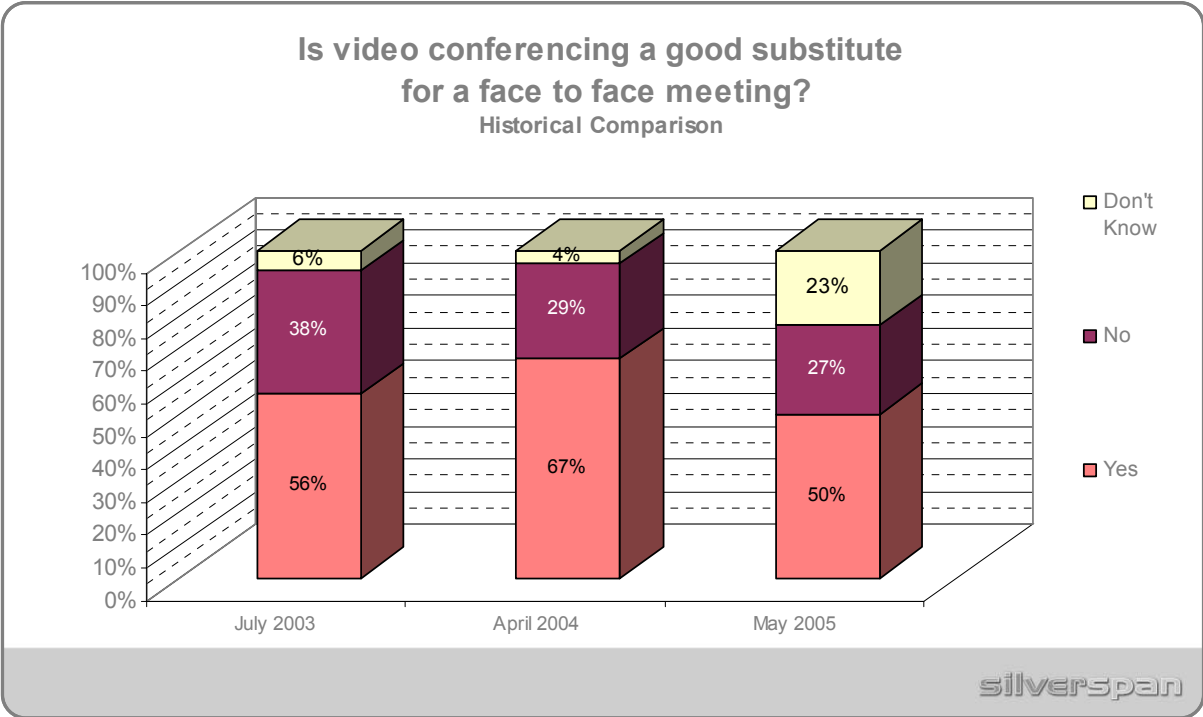
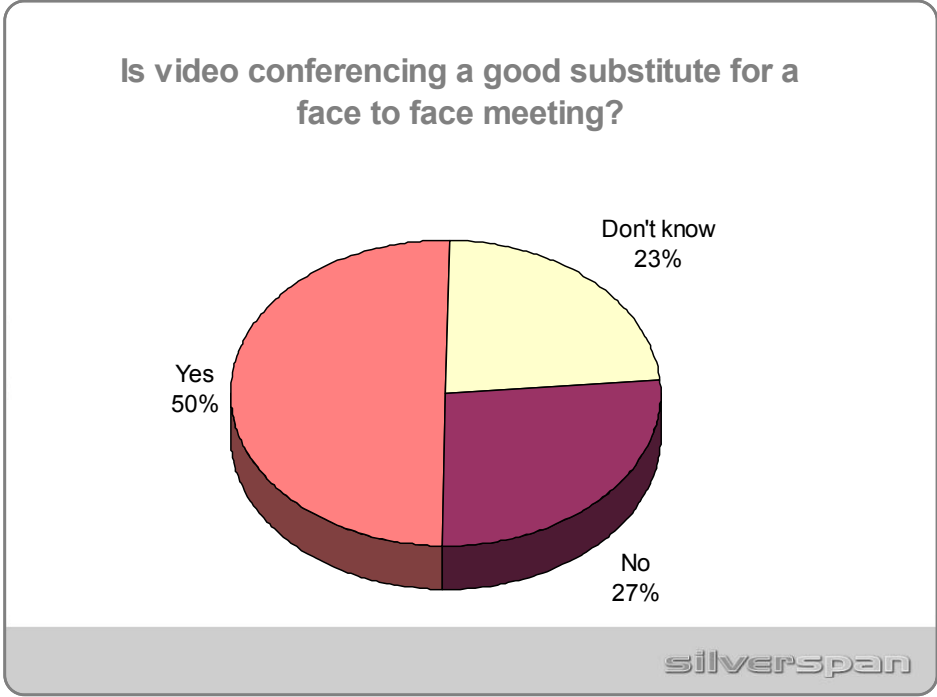
The results varied greatly when analysed by job title.

Over three quarters of CEO's / Managing Directors (78%) interviewed had worked from home in the last week, followed closely by IT Admin & IT Decision makers. In comparison, only 11% of Human Resources Managers had worked from home.

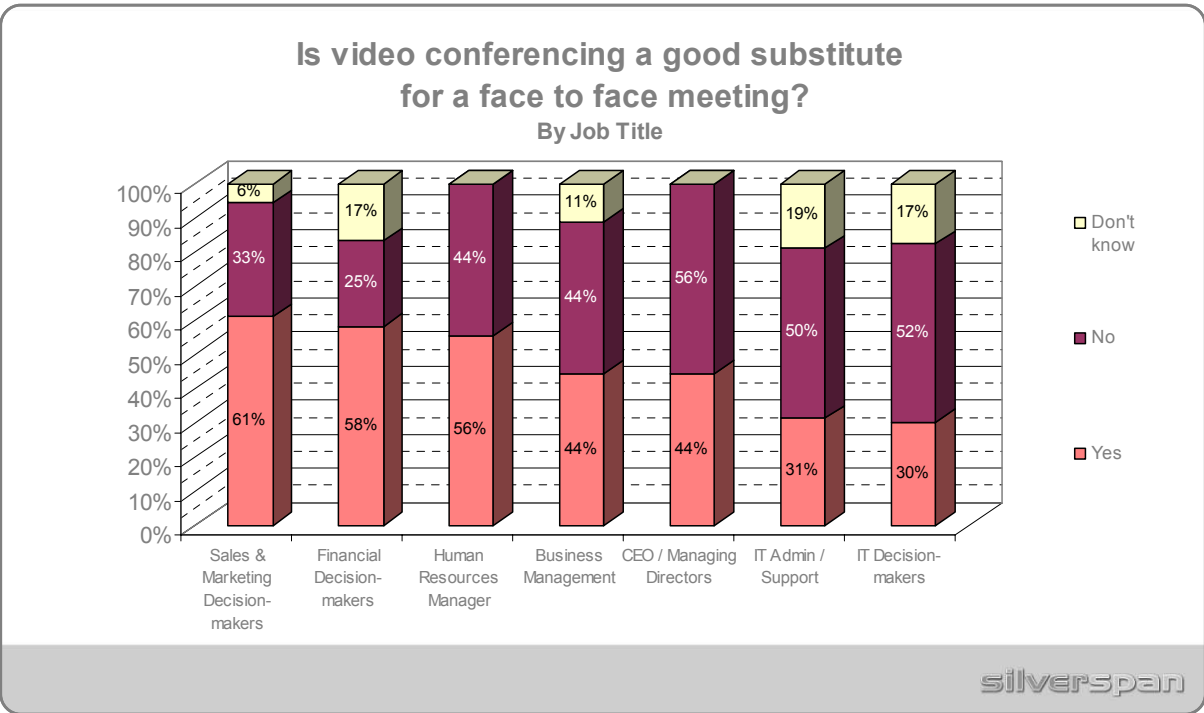
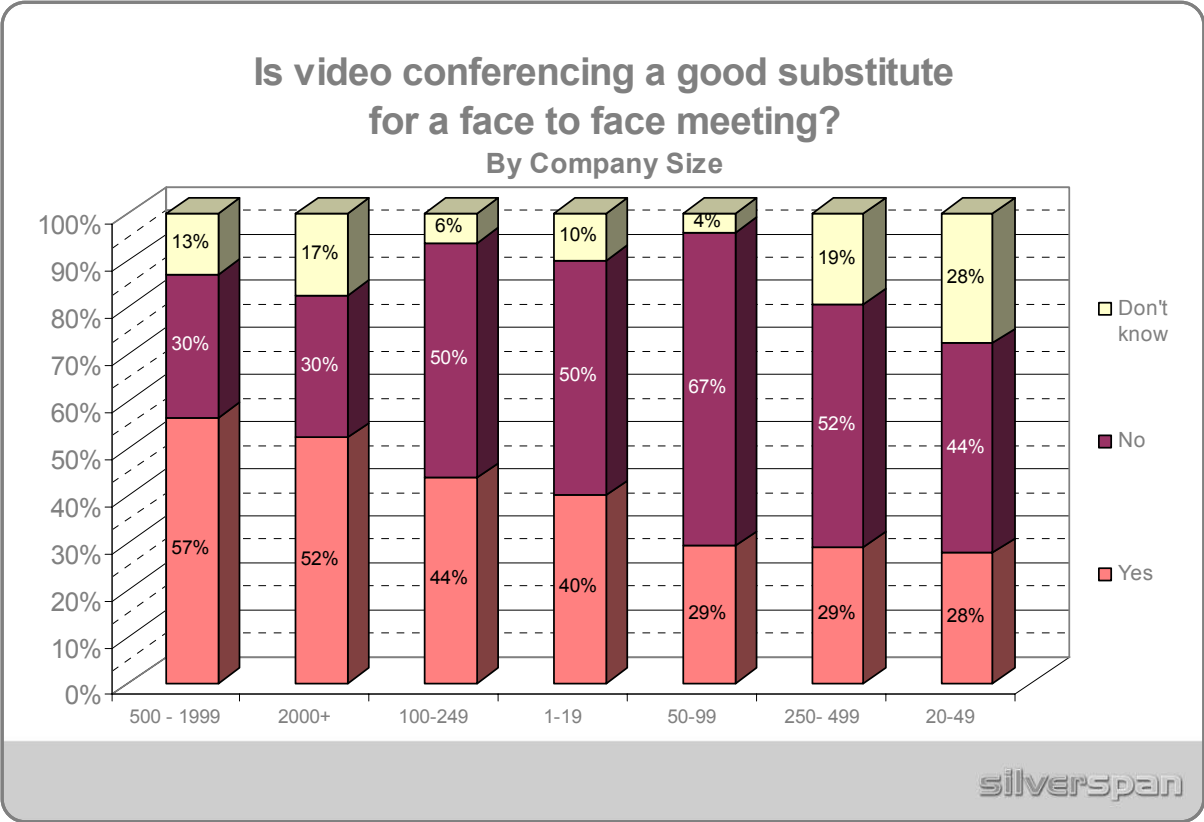


Q2: Do you think that video conferencing is a good substitute for a face to face meeting?

Half of those surveyed said "YES" in response to the question (50%). This is a significant fall, comparing with 67% responding "YES" in the April 2004 survey.



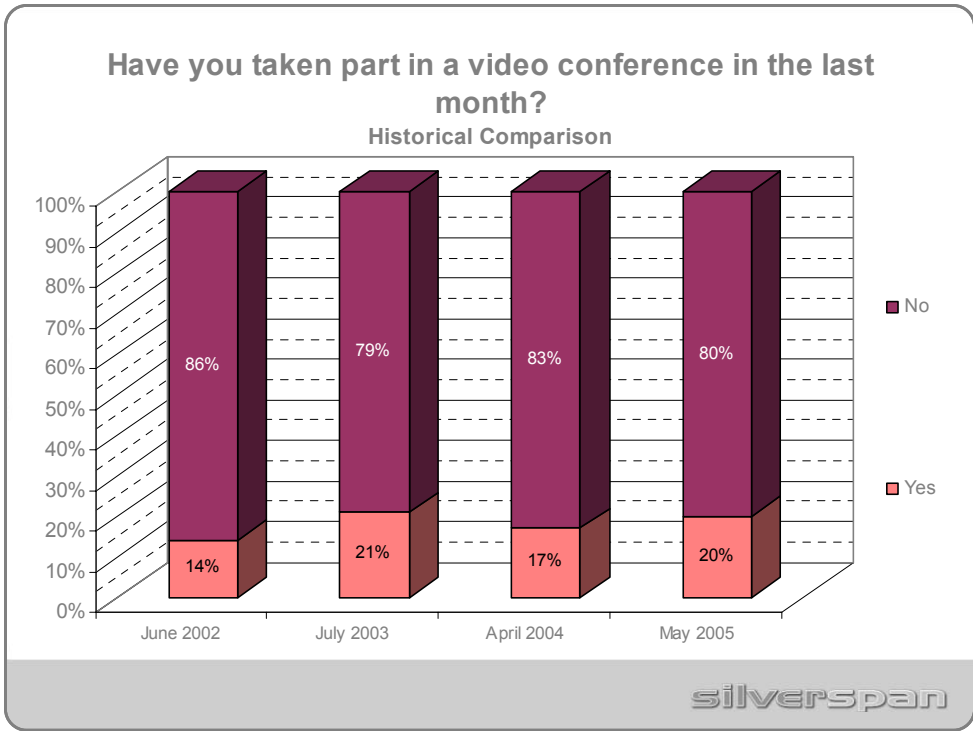
The results varied significantly by company size, with the largest companies most likely to respond "YES". IT department staff were also found to be very negative towards videoconferencing, with a remarkably low 30% indicating "YES".



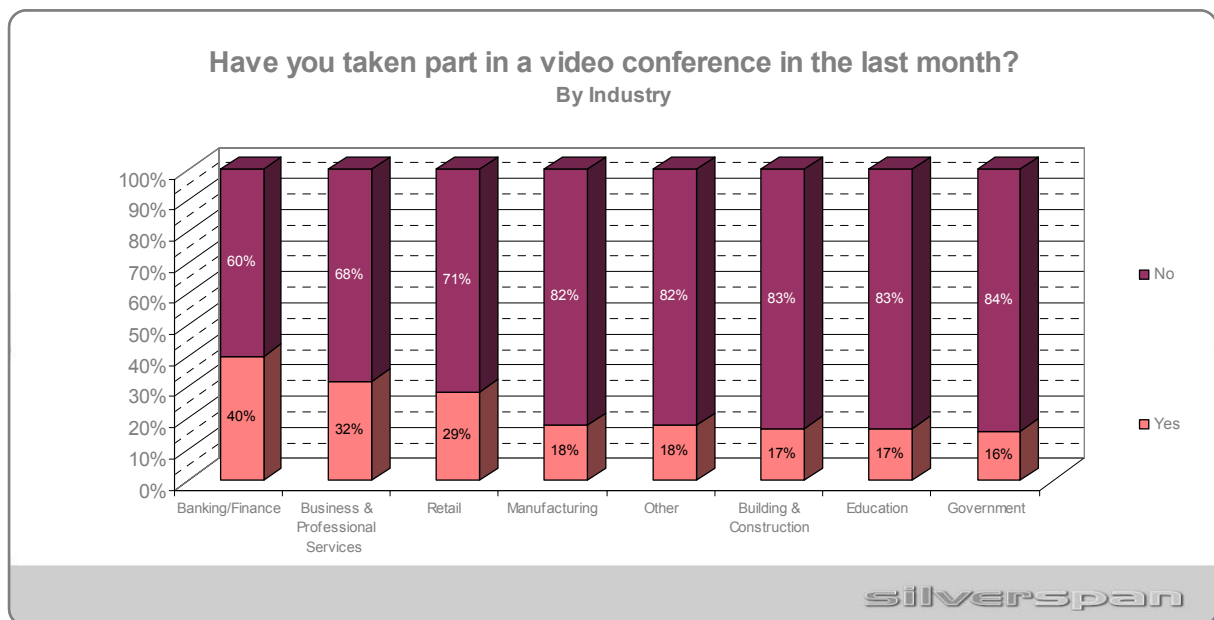
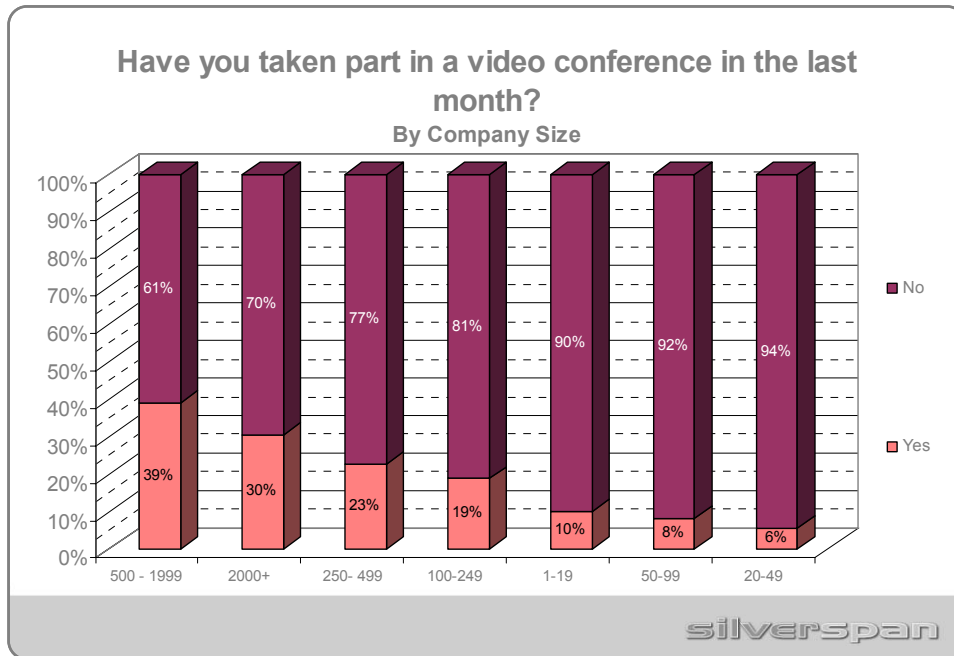
Q3: Have you used Video conferencing in the last month?

The majority of those surveyed said "NO" in response to the question (80%).

In comparison with results from previous surveys, video conferencing usage rates appear to be flat over the last 4 years.



The likelihood of a staff member having taken part in a video conference is closely related to the size of the company, with the largest companies being the most likely. 39% of respondents from companies with 500 - 1999 employees had taken part in a video conference in the last month, compared to less than 10% for firms with fewer than 100 employees.

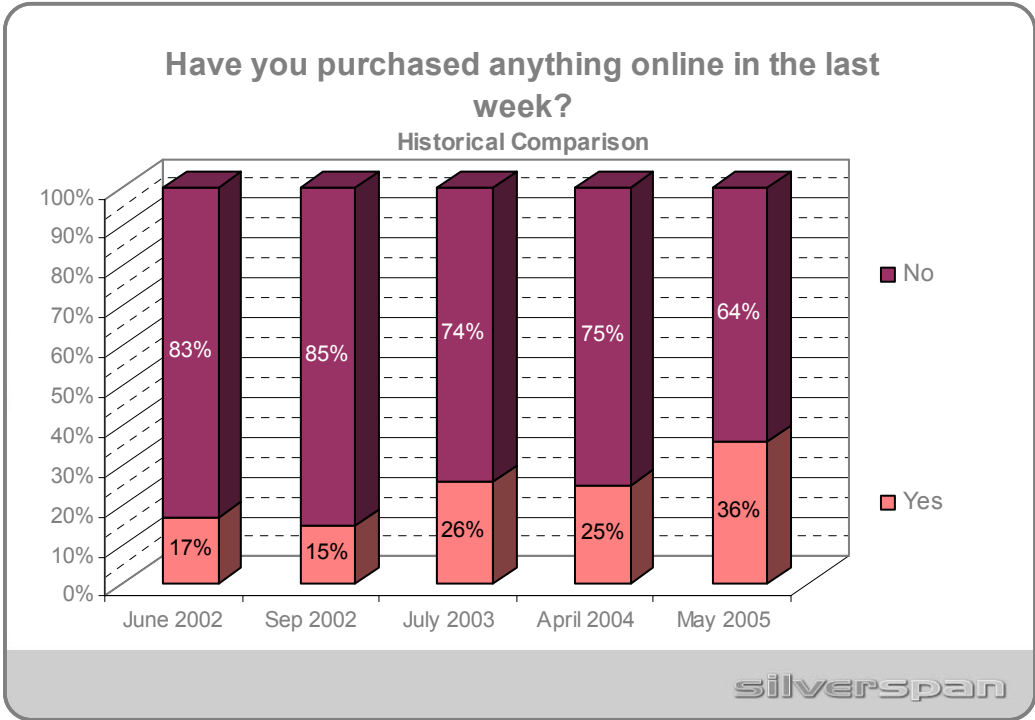
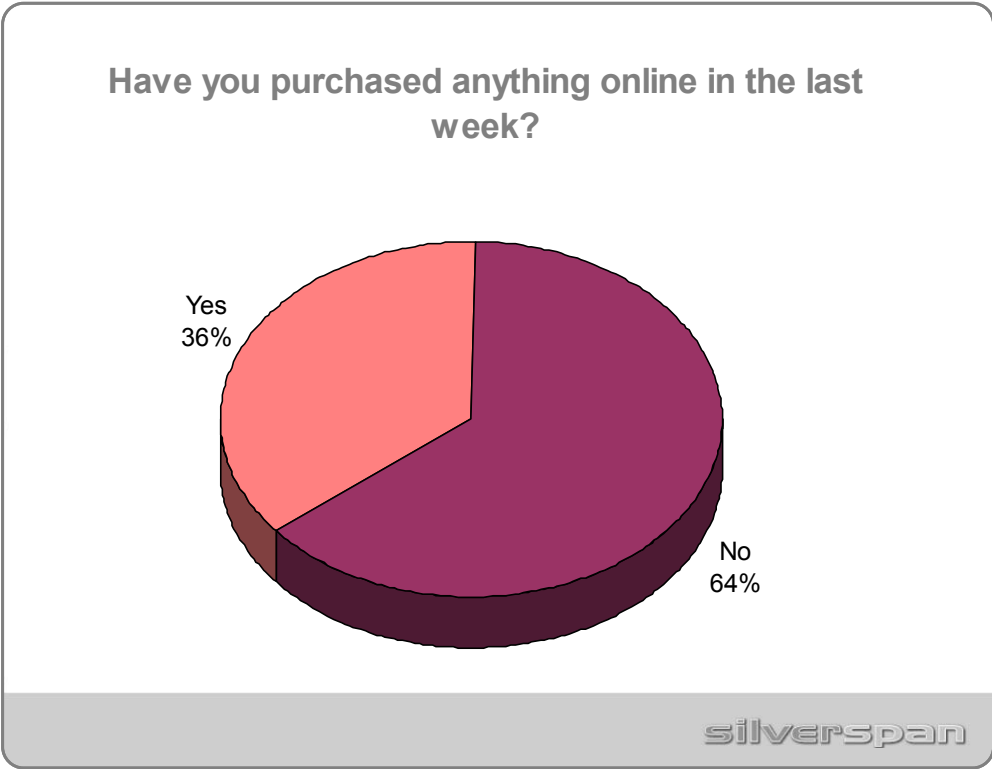


Analysing the results by industry, respondents working within Banking and Finance were most likely to have recently used videoconferencing with 40% saying they had taken part in a video conference within the past month. Education and Government proved the least likely to have taken part, with only 16% and 17% respectively saying "YES".

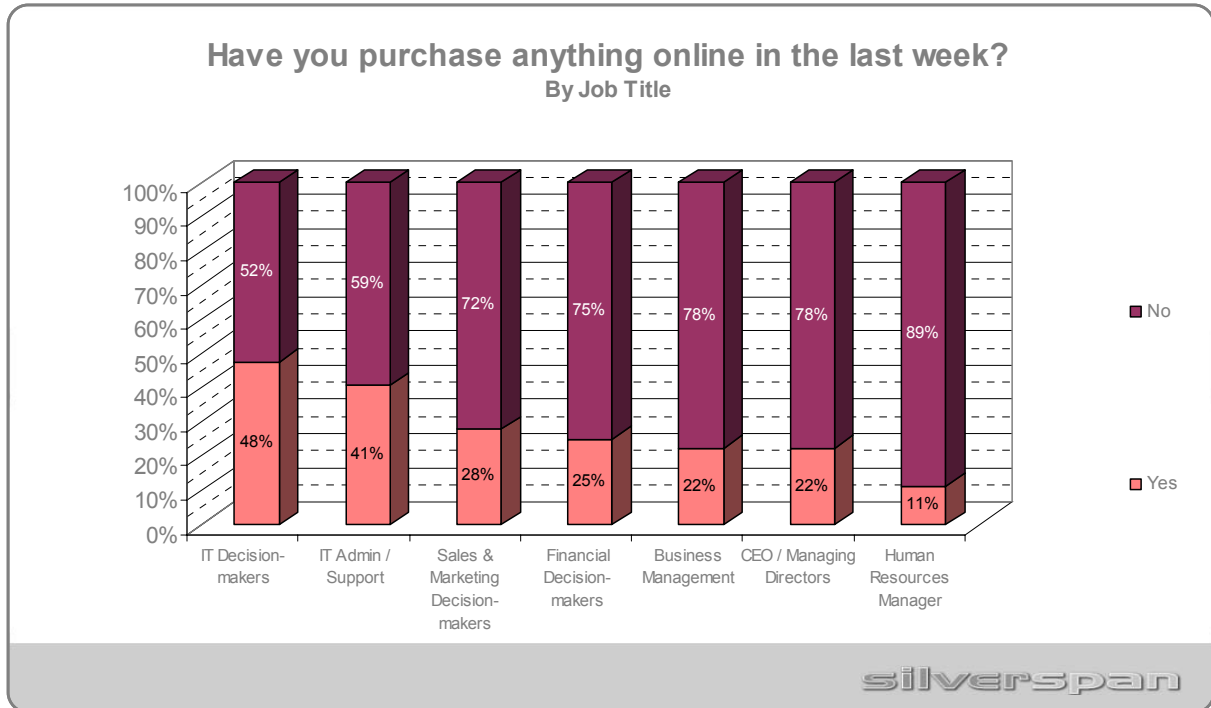
Q4: Have you purchased anything online in the last week?

The majority of those surveyed said "NO" in response to the question (64%).

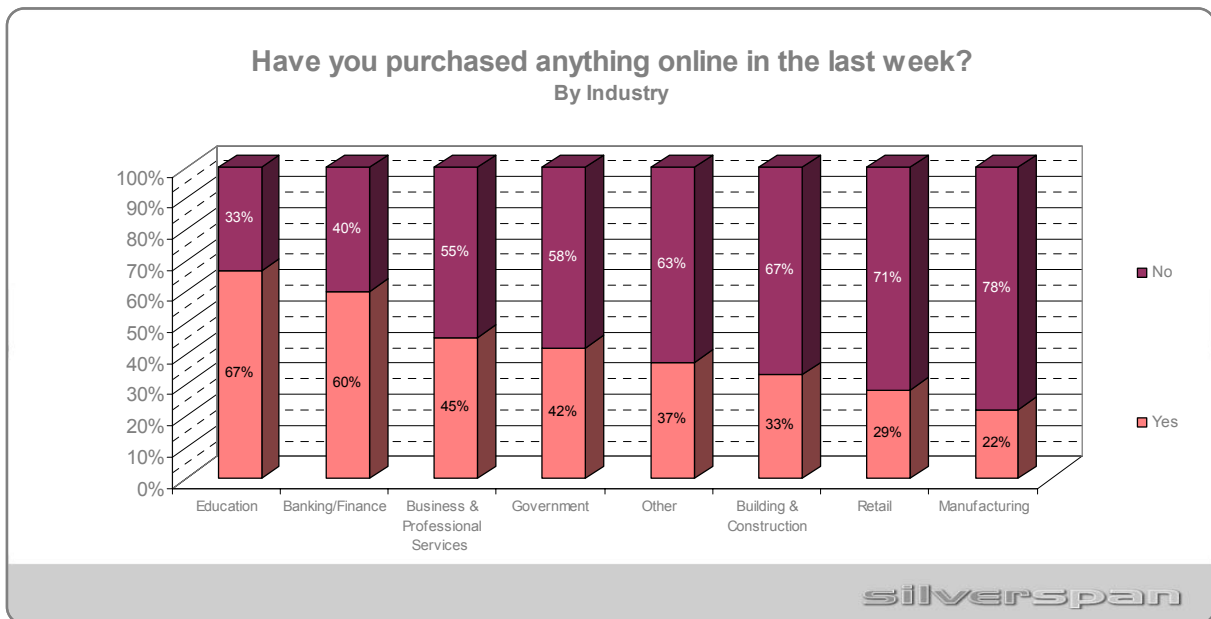
When comparing these results with previous Silverspan surveys, online purchasing rates continue to grow strongly.



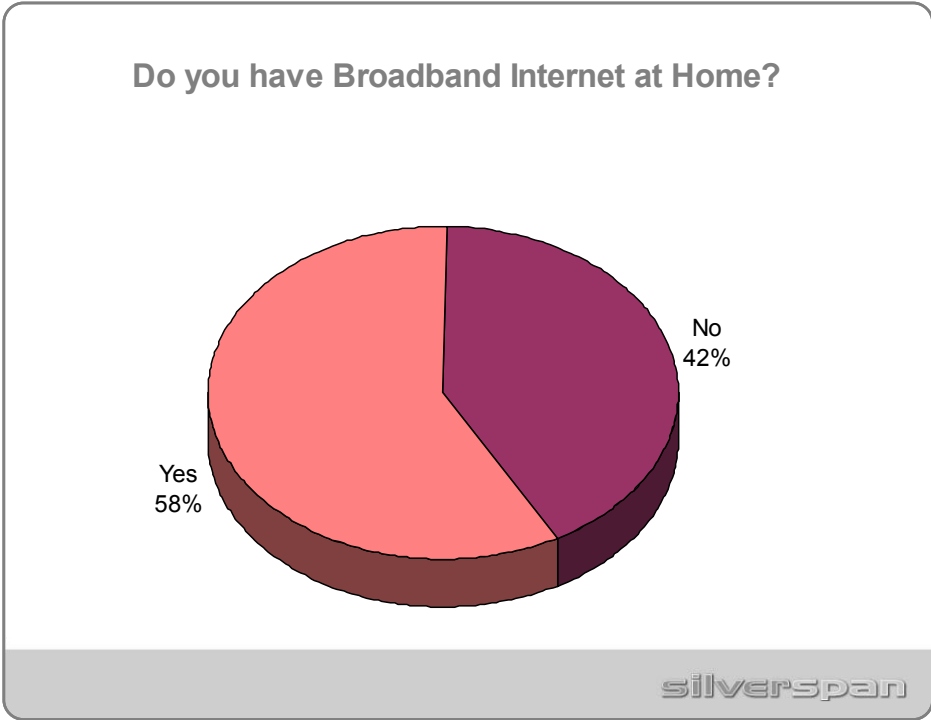
In complete agreement with the results from previous Silverspan research surveys, IT related jobs were most likely to have purchased online (48% and 41%), and Human Resource Decision-makers were the least likely (11%).



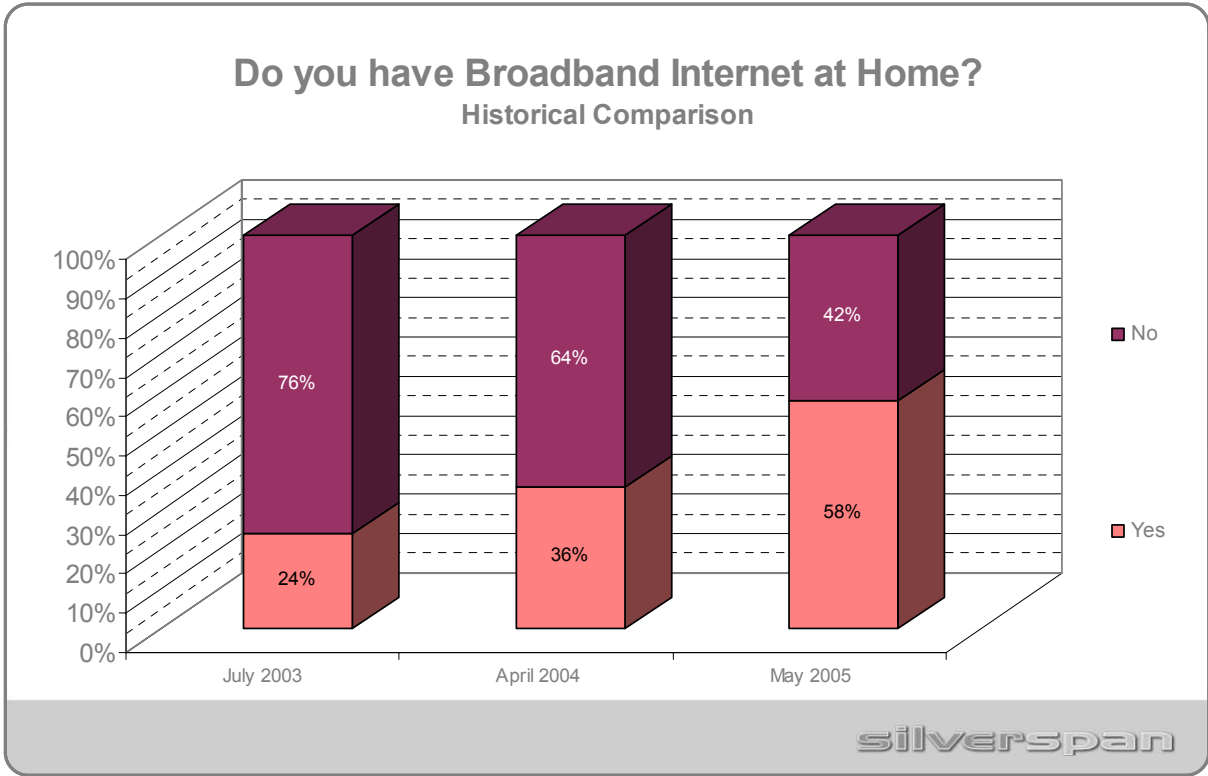
When analysed by industry, respondents from the Education (67%) and Banking & Finance (60%) sectors were most likely to have purchased online in the previous week.

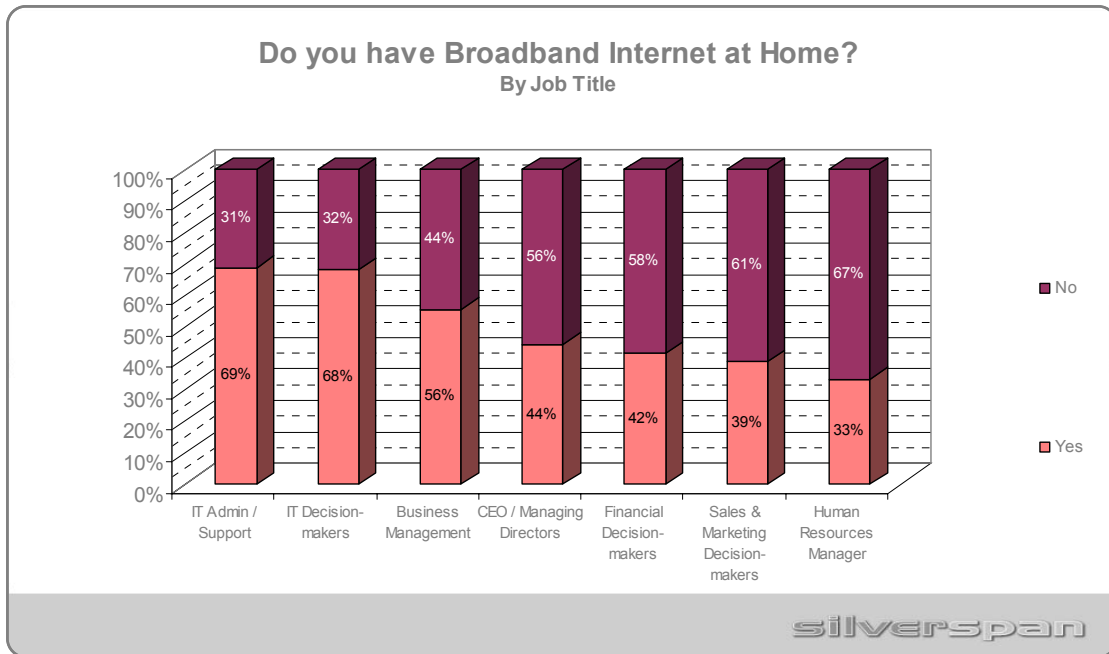


Q5: Do you have a broadband internet service at home?



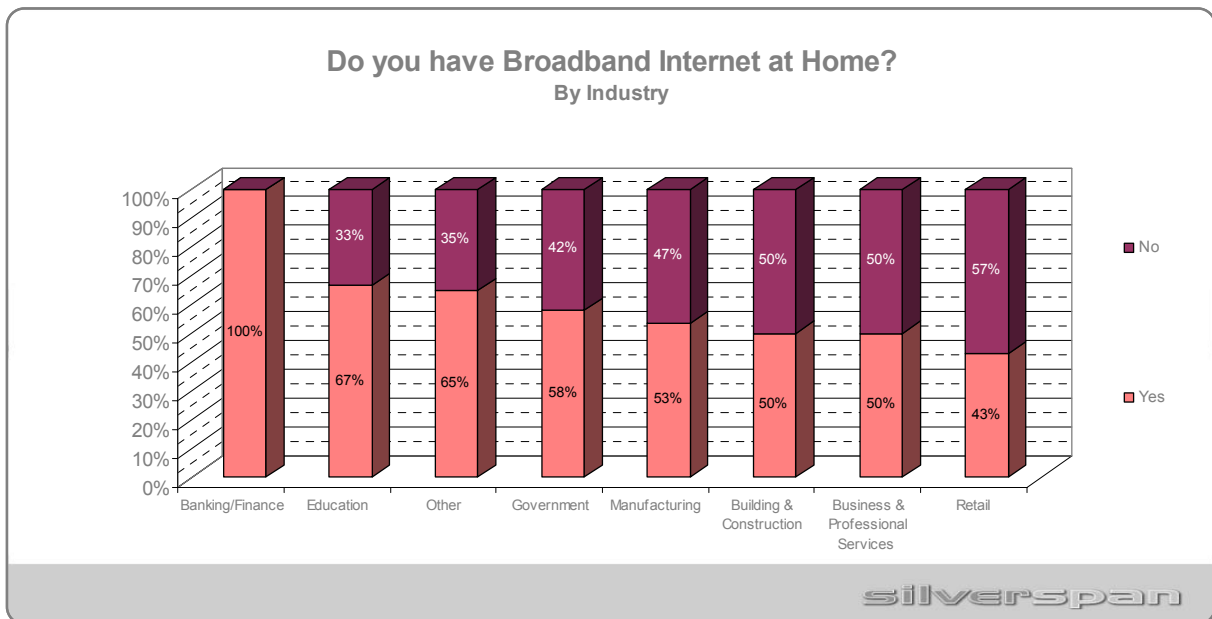
The majority of those surveyed said "YES" in response to the question (58%). Compared to previous survey results, there has been an extremely rapid increase in the number of respondents with a home broadband service.





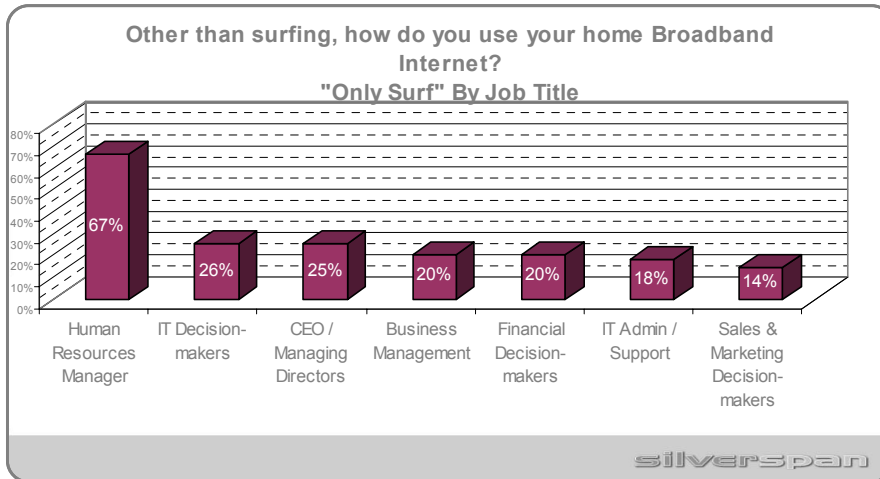
Consistent with previous Silverspan surveys, IT department staff were most likely to have a broadband service (69% and 68%), and Human Resource Managers the least (33%).

Banking & Finance again proved to be the industry group most likely to have broadband access at home (100%), with Retail the least likely (43%).

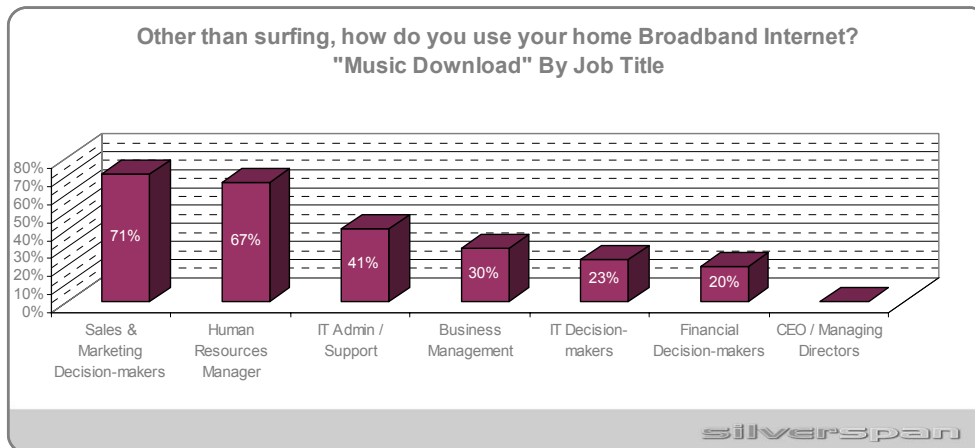


Q6: Other than surfing, how do you use your home Broadband Internet?

Only respondents that indicated in Question 5 that they have a broadband Internet service at home were asked this question. Responses measured included Download Music, Download Video, Online Games, IP Telephony, File Swap, Only Surf, Video conference, and Other.



Analysis of the responses clearly indicates that website Surfing, Music Downloads and Work are the only widespread uses for broadband Internet amongst respondents. File Swapping, Download of Video content, IP Telephony and Video Conferencing were all found to have negligible usage rates.

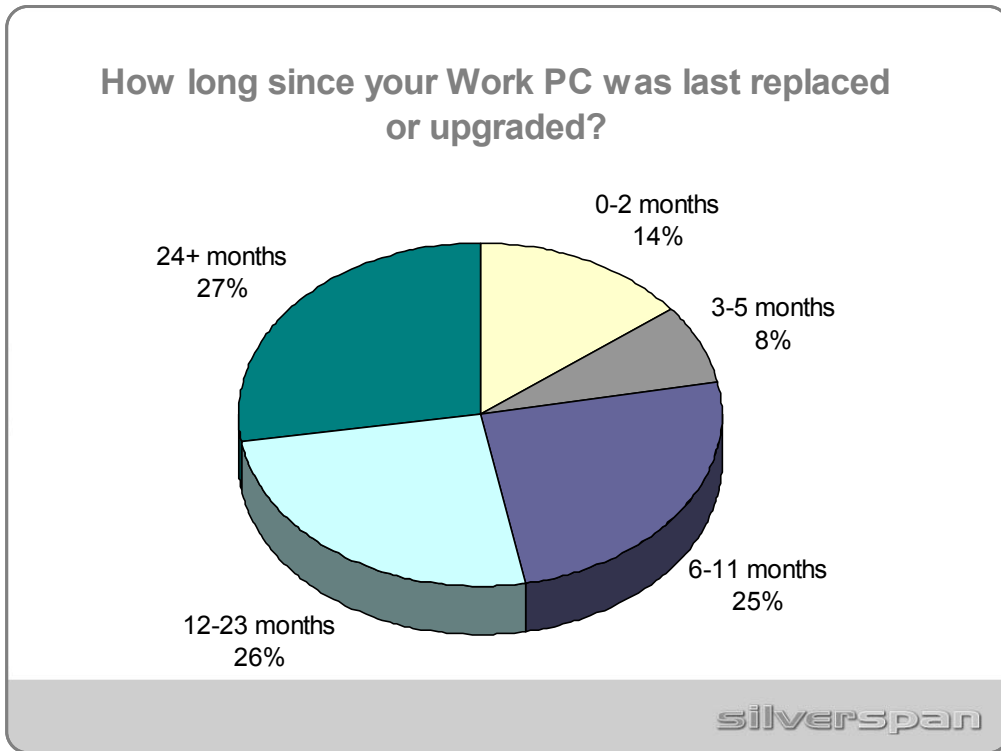


Online Gaming, which is generally considered a very well established category of broadband Internet content, was nominated only by IT Decision maker respondents (5%).

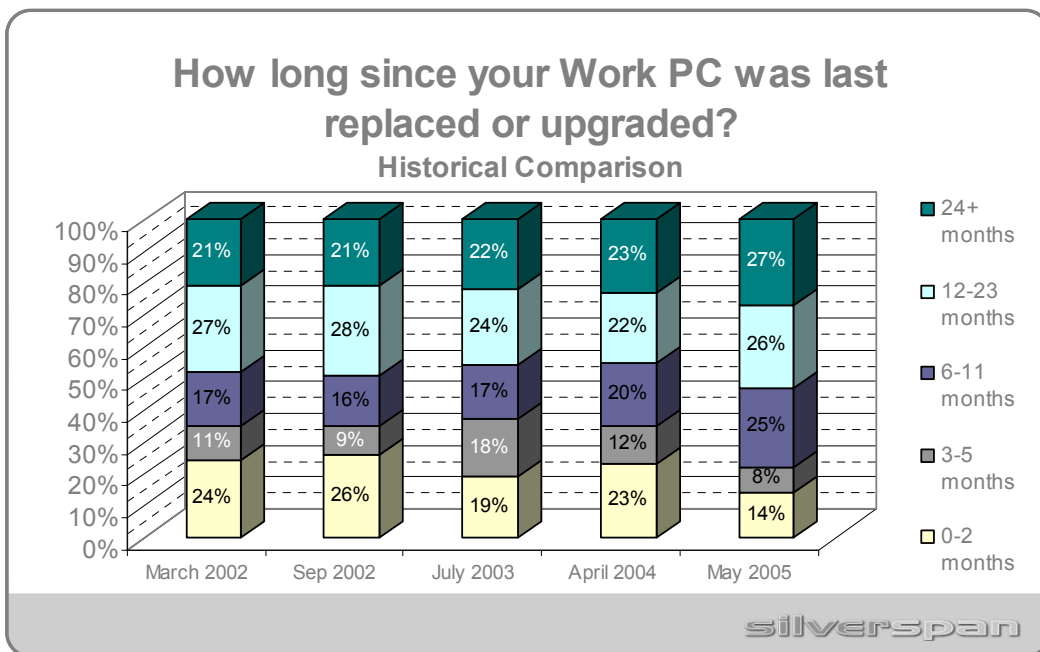
Sales & Marketing decision makers were the most likely to nominate "Music Downloads" (71%), and CEO/Managing Directors the least (0%).

Q7: How long is it since your work computer was last replaced or upgraded?

This question revealed that 47% of interviewees had benefited from a computer replacement or upgrade in the last 12 months.



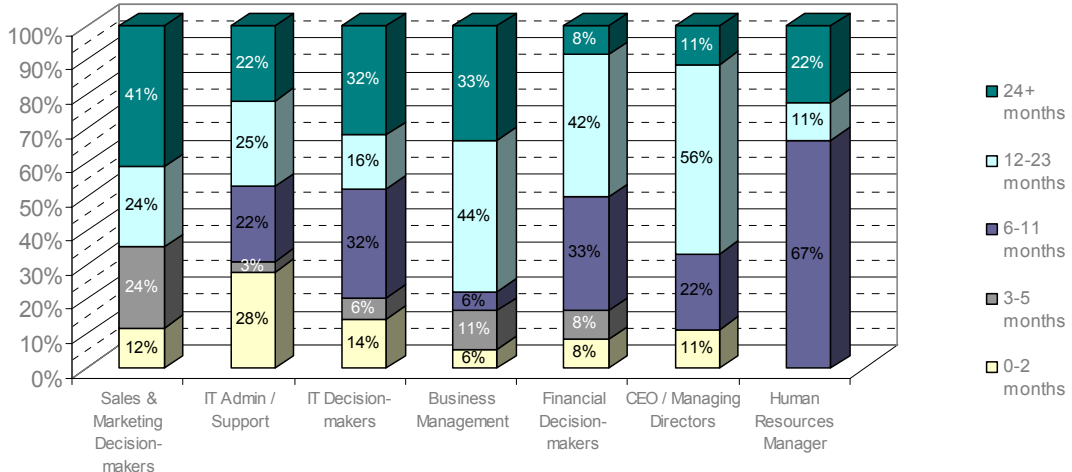
In comparison to results from previous surveys, only 22% of respondents indicated a replacement within 0-11 months compared with 35% in March 2002.



Taking into account job titles, Sales & Marketing Decision Makers were the most likely to have received a new computer in the last 6 months (36%). They were also the most likely to have a computer more than 2 years old (41%).

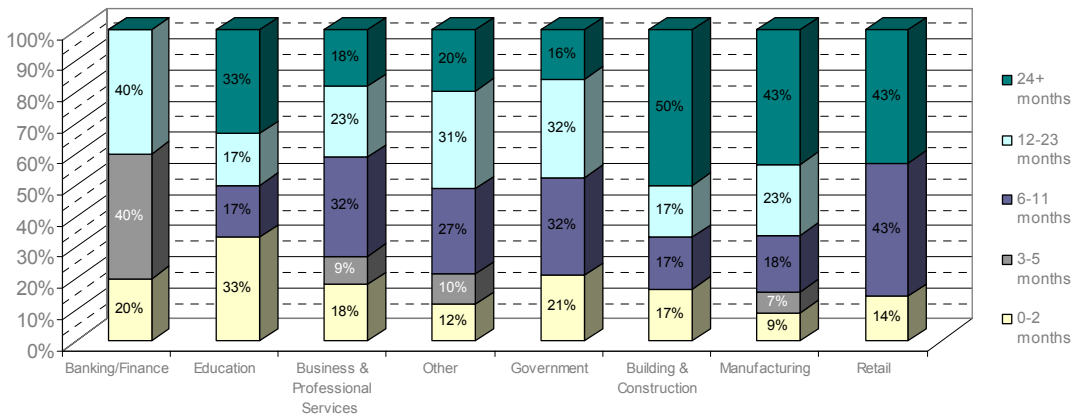
Financial decision makers and CEO/Managing Directors were the least likely to have a computer more than 2 years old (8% and 11%).

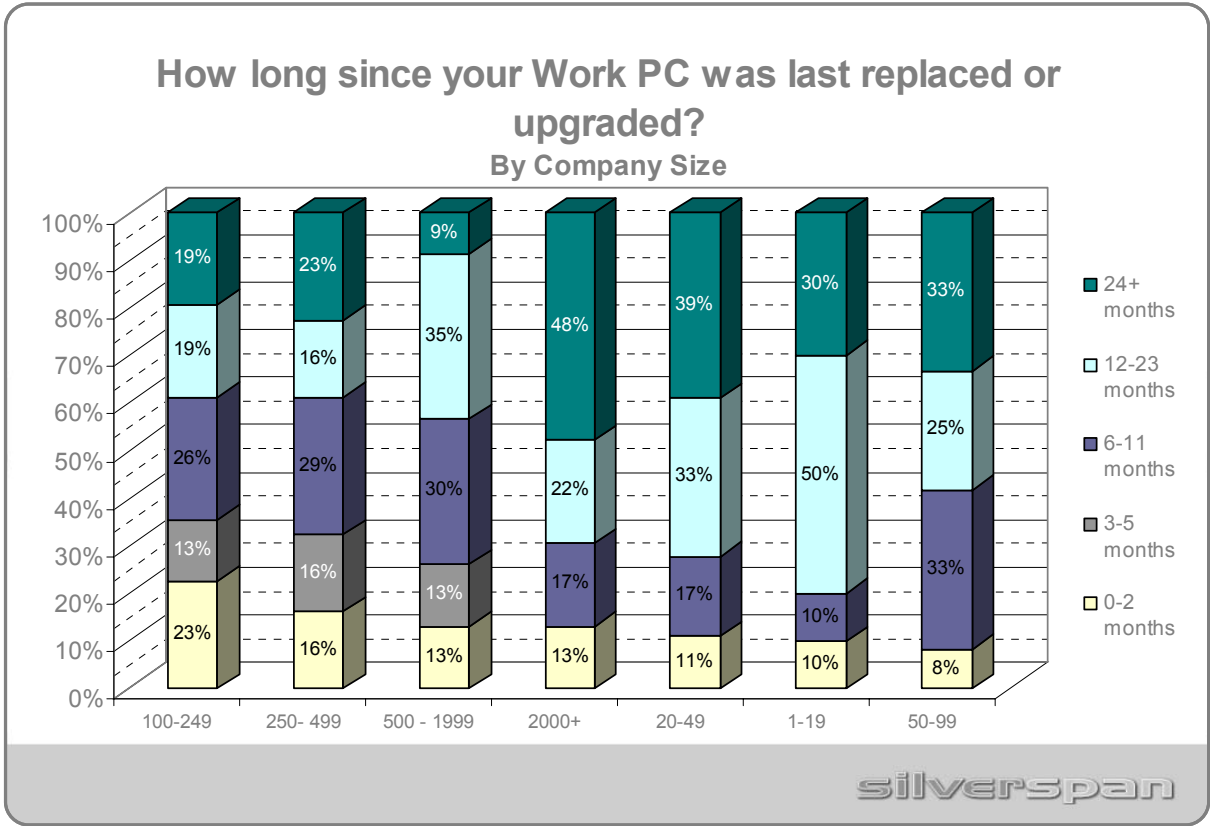
How long since your Work PC was last replaced or upgraded?
By Job Title



Banking & Finance staff were by far the most likely to have benefited from an upgrade with 60% interviewed indicating their computer was upgraded in the past 6 months. Education was the second most likely with 33%. The least likely was Retail with 14%.

How long since your Work PC was last replaced or upgraded?
By Industry



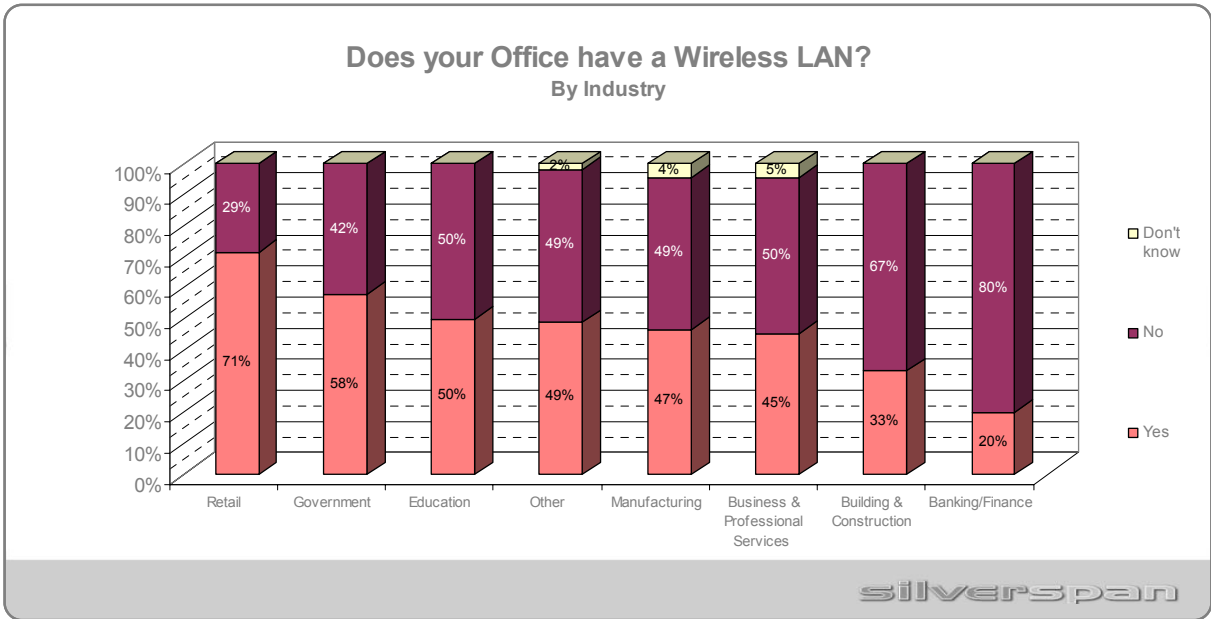
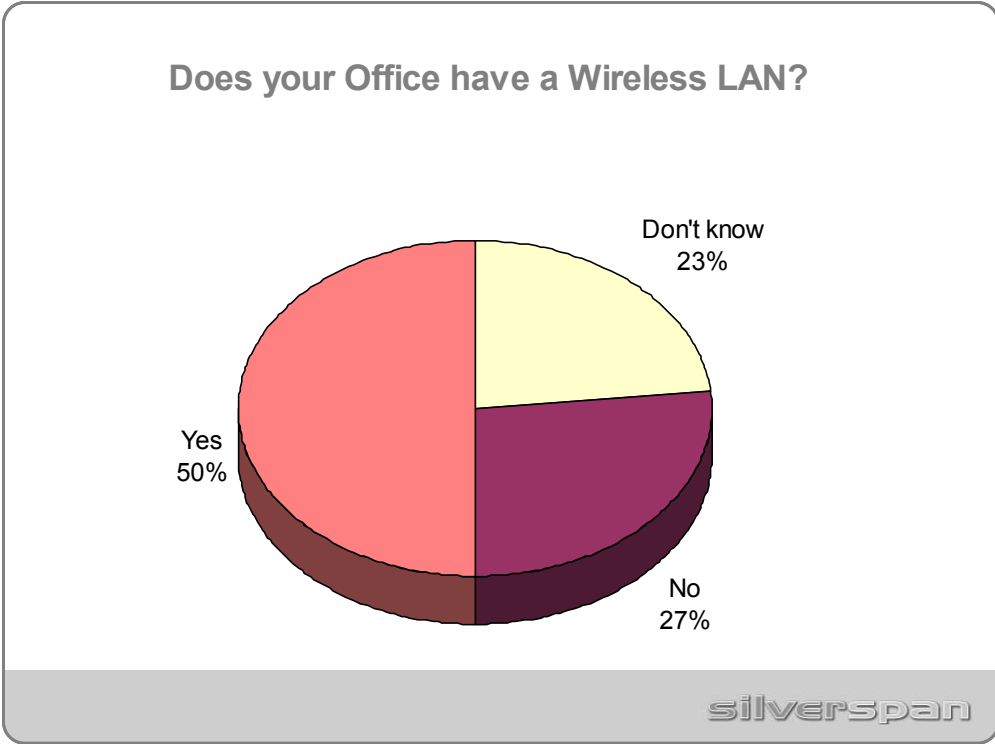


Company size played a strong factor in the likelihood of the respondent receiving an upgrade in the last 6 months, with 100-249 employees being the most likely (36%) and companies with fewer than 100 employees being the least likely.

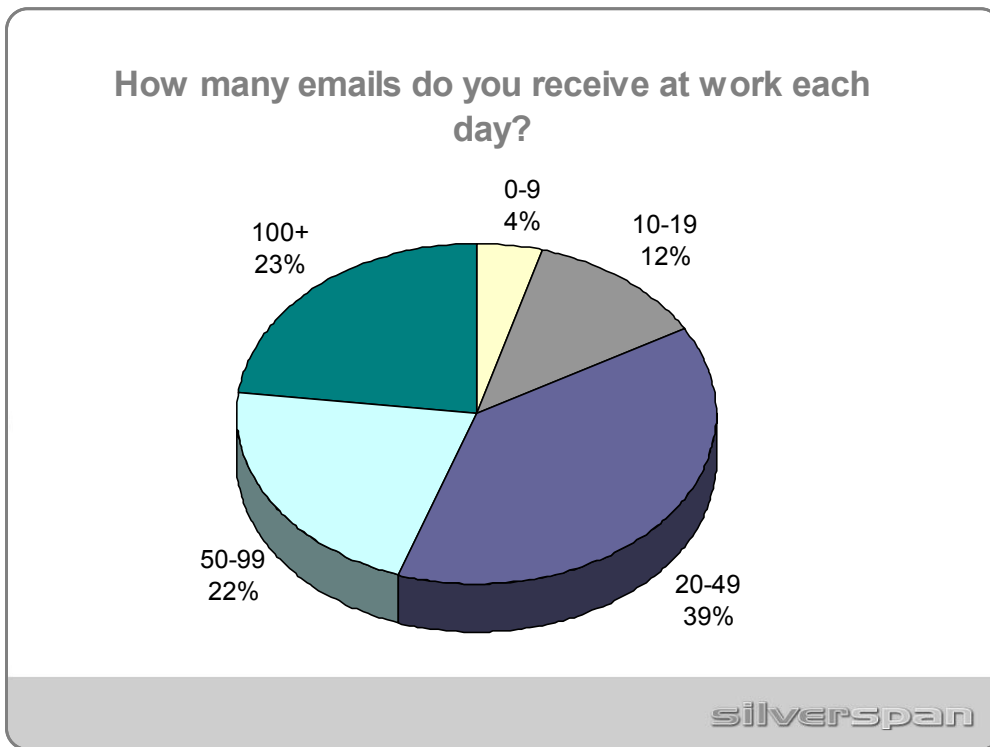
Q8: Does your office have a Wireless LAN?

Half of those surveyed work in an office with a wireless network (50%).

Retail was the industry most likely to have a wireless networks with 71% responding "YES". Banking /Finance was the least likely (20%).

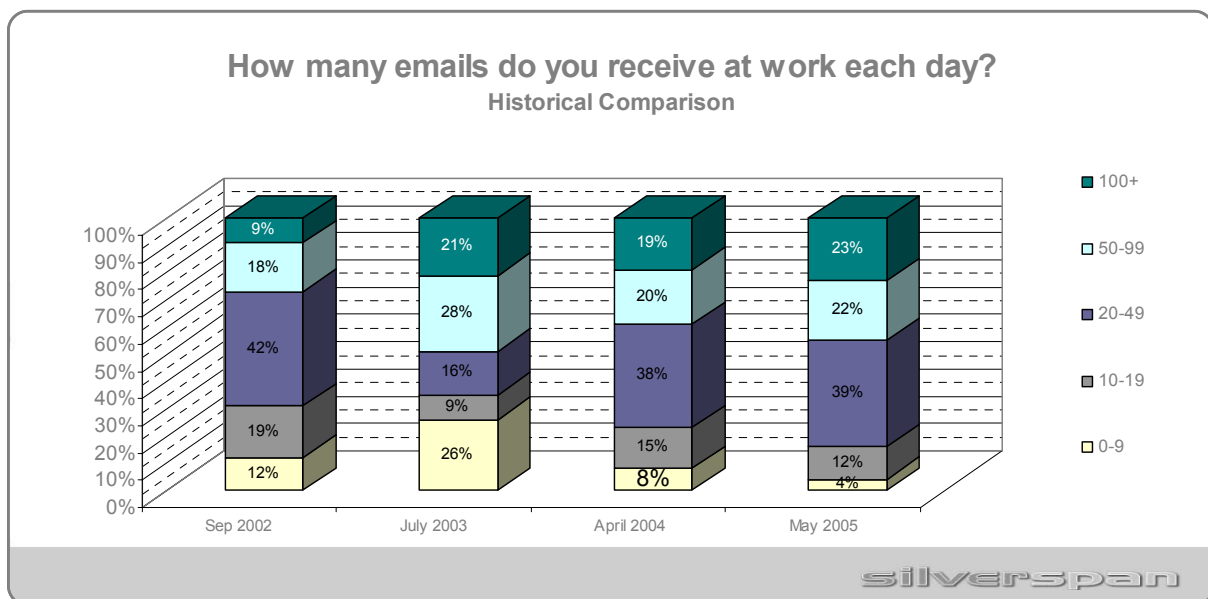


Q9: Approximately how many emails do you receive at work each day?



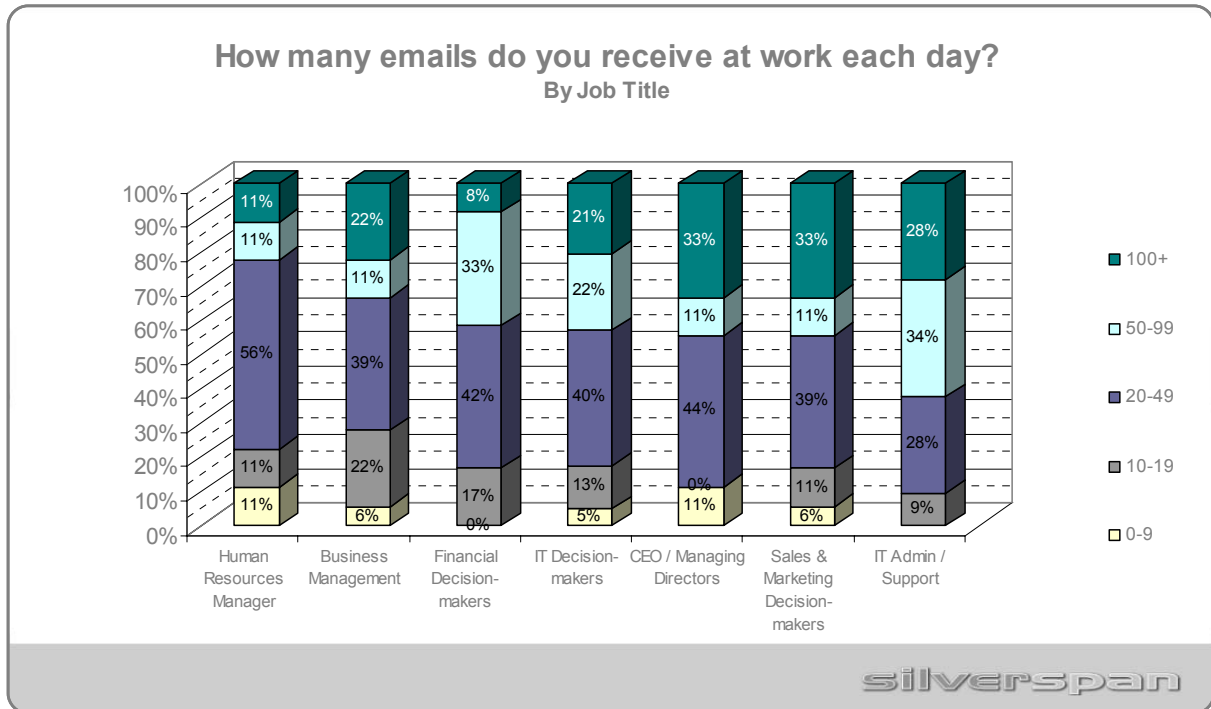
55% of those surveyed responded that they receive up to 49 emails on average each day.

In comparison with the results of previous Silverspan surveys, the number of people responding receiving more than 50 emails per day is growing rapidly. In September 2002 a mere 27% of respondents received more than 50 emails per day, compared with 45% for this survey.

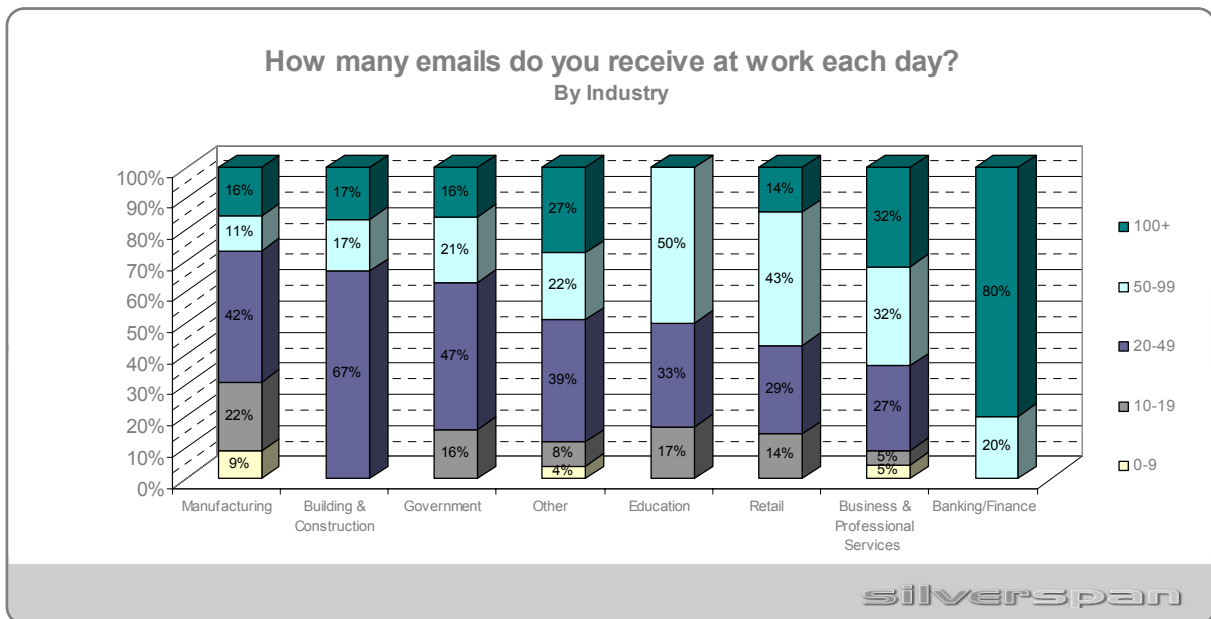


Human Resource Decision-makers, Business Management and Financial Decision-makers are most likely to receive fewer than 50 emails a day.

Sales & Marketing and CEO/Managing Director are the jobs most likely to receive more than 100 emails per day (33%).

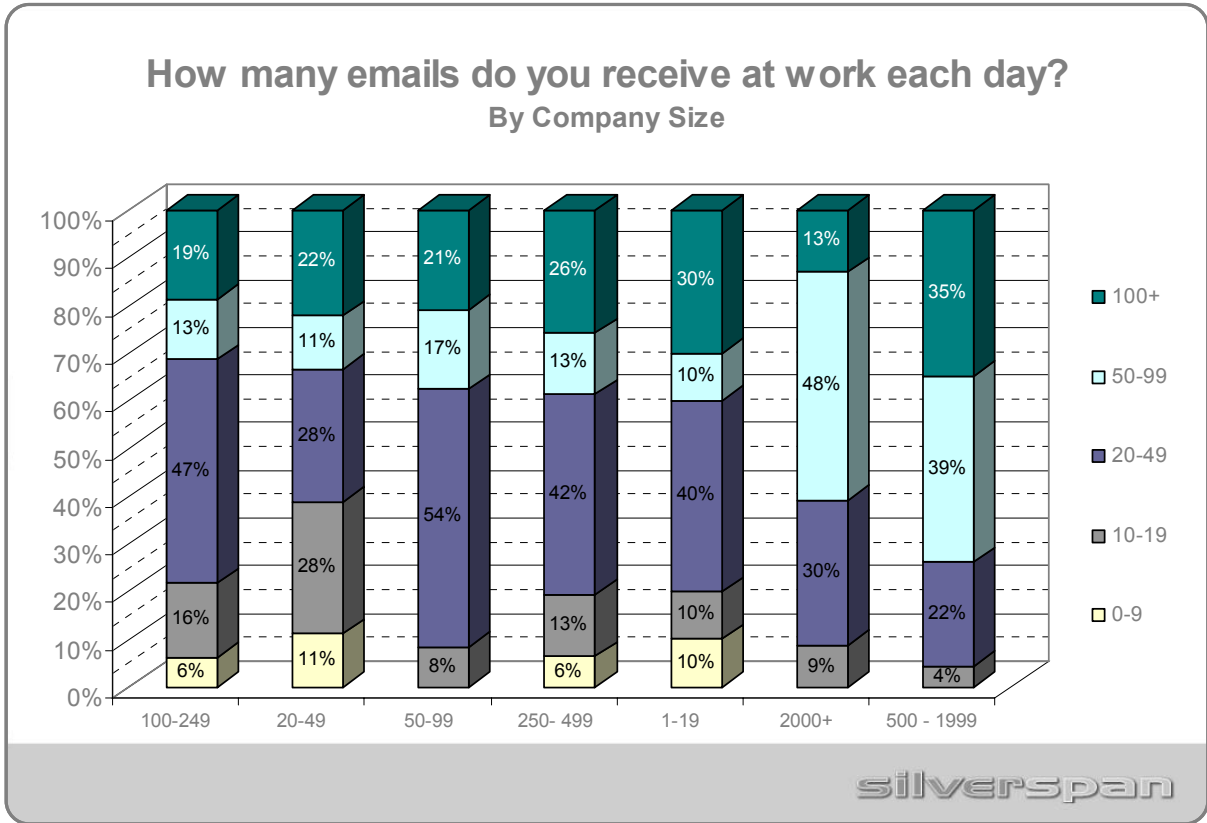


Banking/Finance was the industry in which respondents are most likely to receive 100+ emails per day (80%). In contrast the Manufacturing sector was the industry with the smallest reported quantity of email, with 73% of respondents reporting receiving fewer than 50 emails a day.

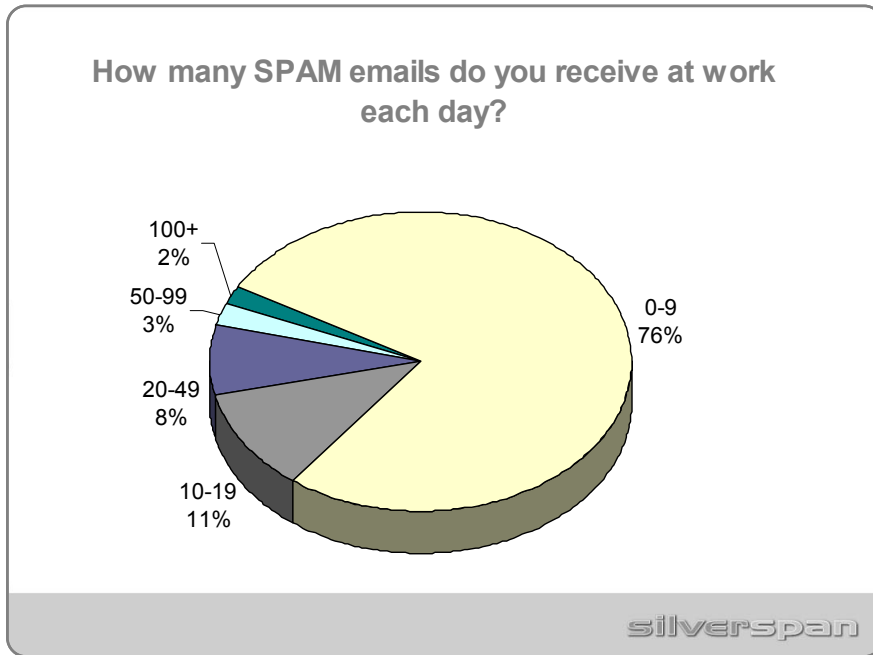


Staff at the largest companies indicated that they received far larger quantities of emails. Companies with 500-1999 and 2000+ employees had the highest proportion of employees reporting more than 50 emails per day (74% and 61%).

In addition 35% of respondents at companies with 500-1999 employees reported receiving more than 100 emails per day on average.

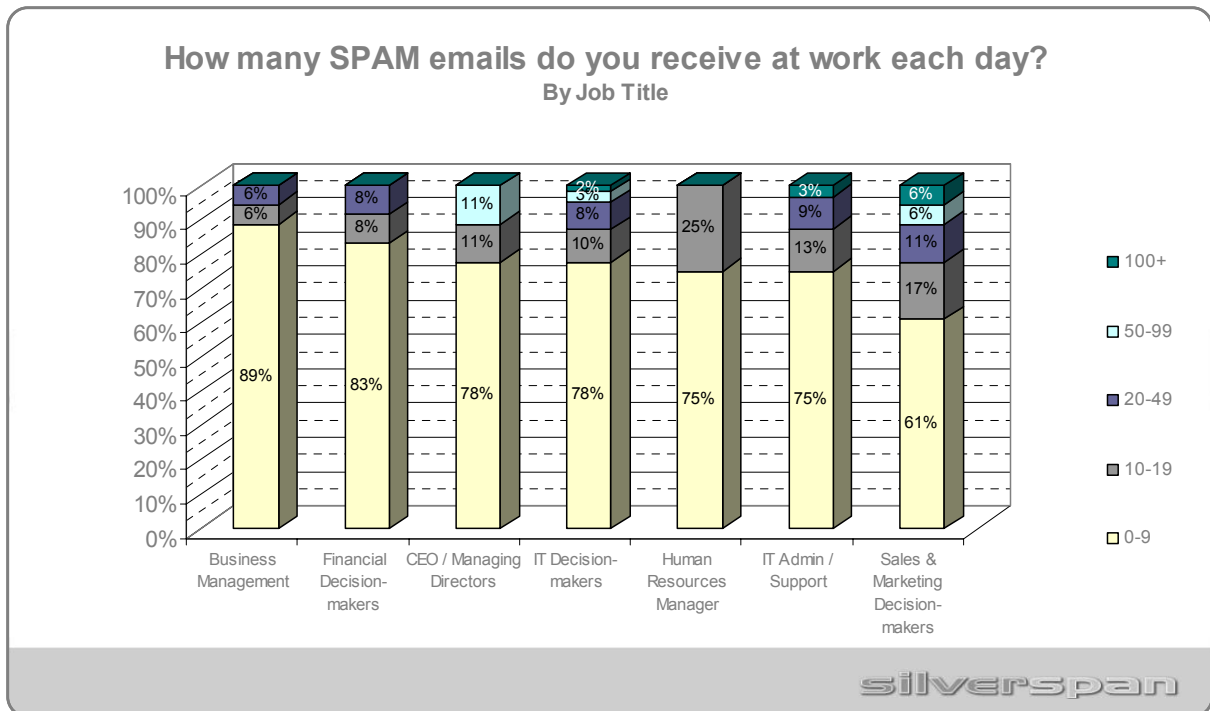


Q10: How many spam / unsolicited emails do you receive at work each day ?

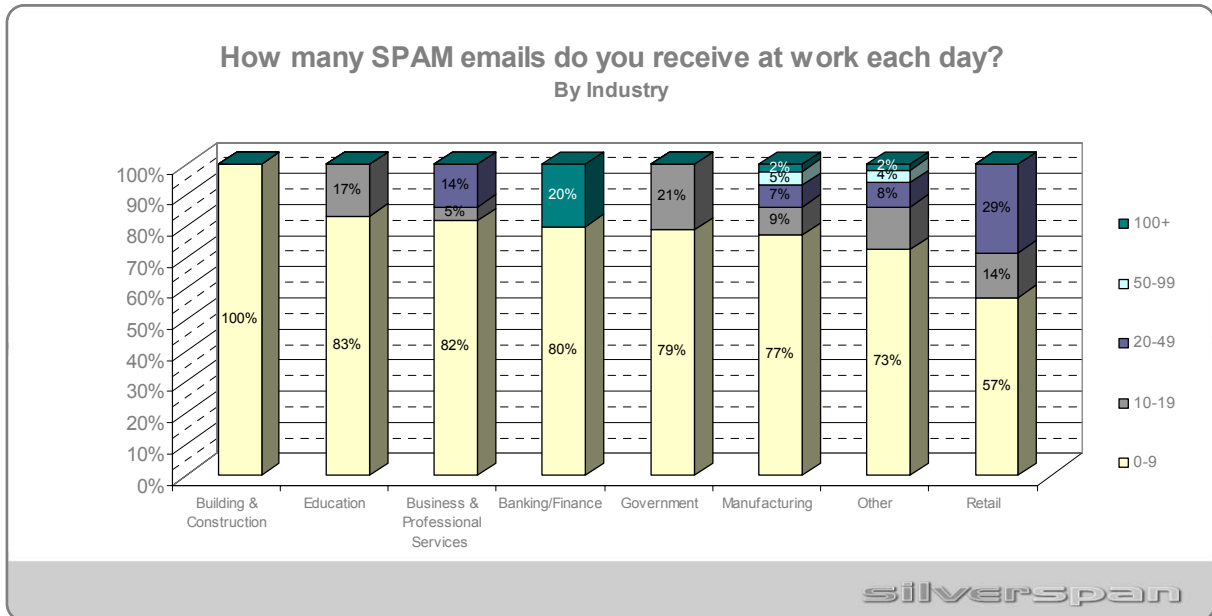


76% of those surveyed responded that they receive 0-9 spam emails on average each day. 13% responded that they received more than 20 spam emails per day.

When analysing the results by job title, there were enormous differences. Sales & Marketing decision makers were the most likely to receive more than 10 spam emails per day (39%).

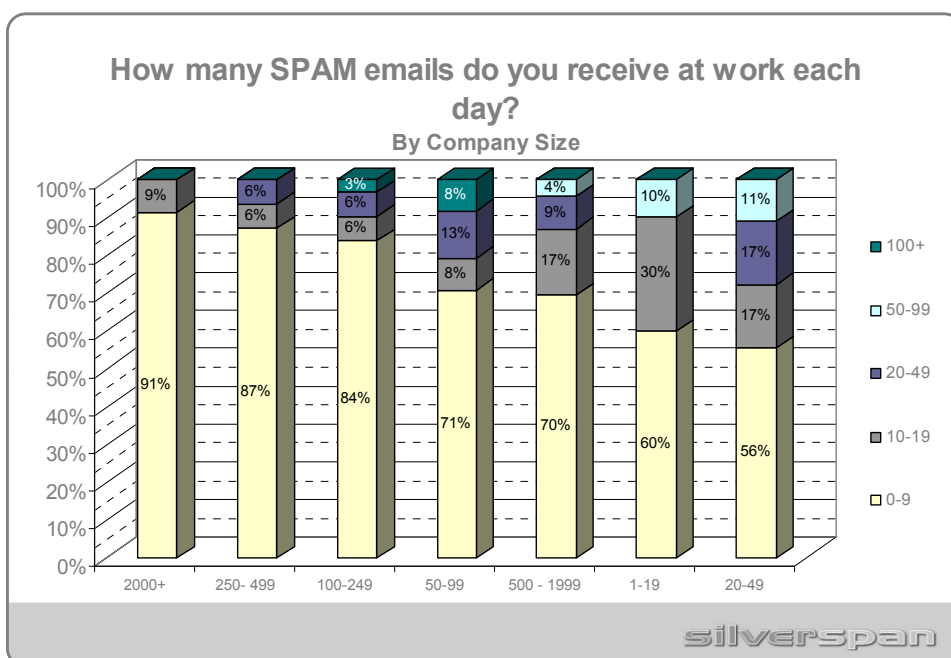


Respondents working in the Building & Construction sector were least likely to receive spam emails, with 100% indicating that they receive fewer than 10 spam emails each day. In comparison, 43% respondents from the Retail sector indicated that they receive more than 10 spam emails per day.



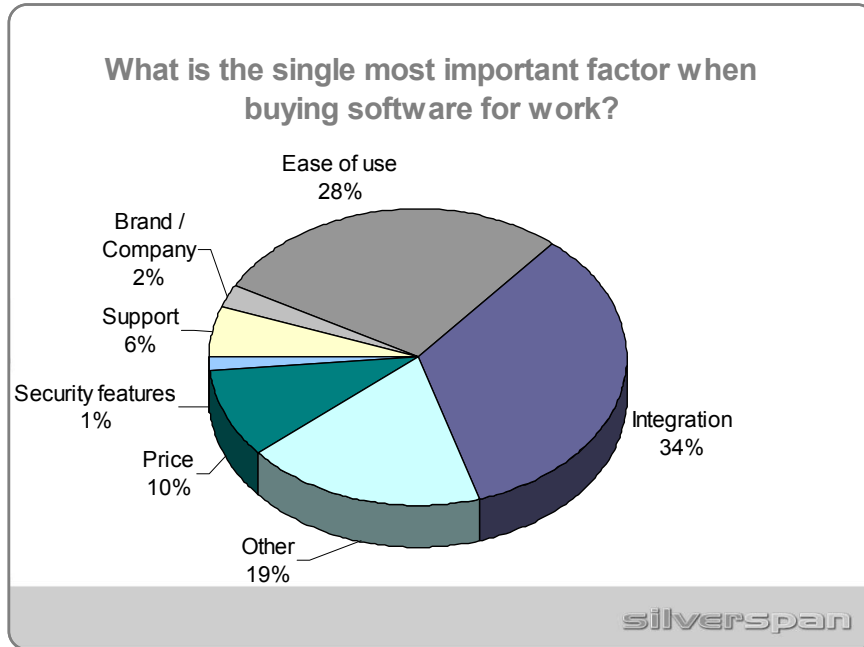
Respondents working at companies with fewer than 50 employees were the most likely to receive significant quantities of spam emails, with more than 10 per day being received by 40% of companies with 1-19 staff, and 44% of companies with 20-49 staff.

Companies with more than 2000 staff clearly received the least amount of spam emails on average, with 91% indicating fewer than 10 spam emails on average per day.



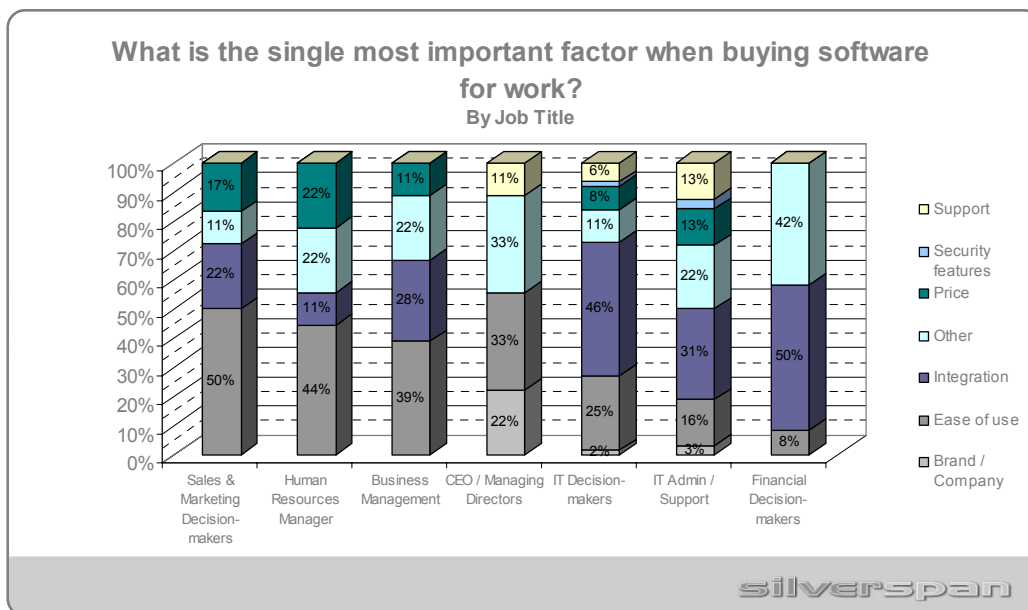
Q11: What do you think is the single most important factor when buying software for work?

34% of those questioned believed Integration/Interoperability was the single most important factor when buying software for work. This was followed by "Ease of Use" with 28%.

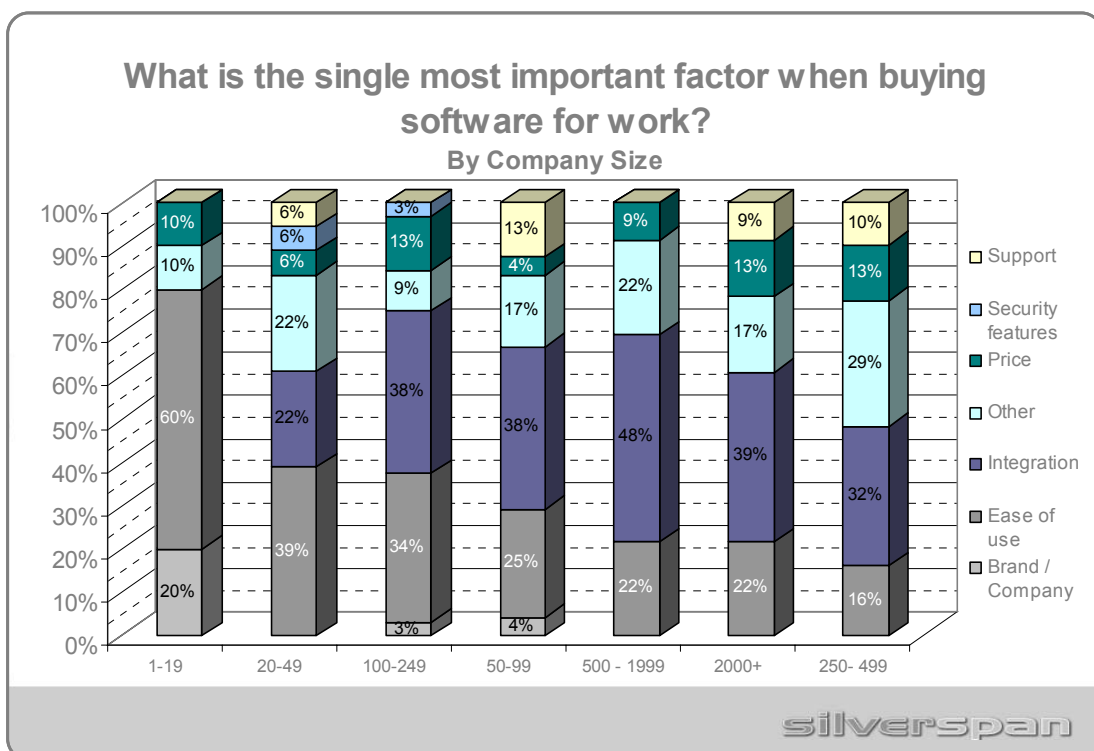
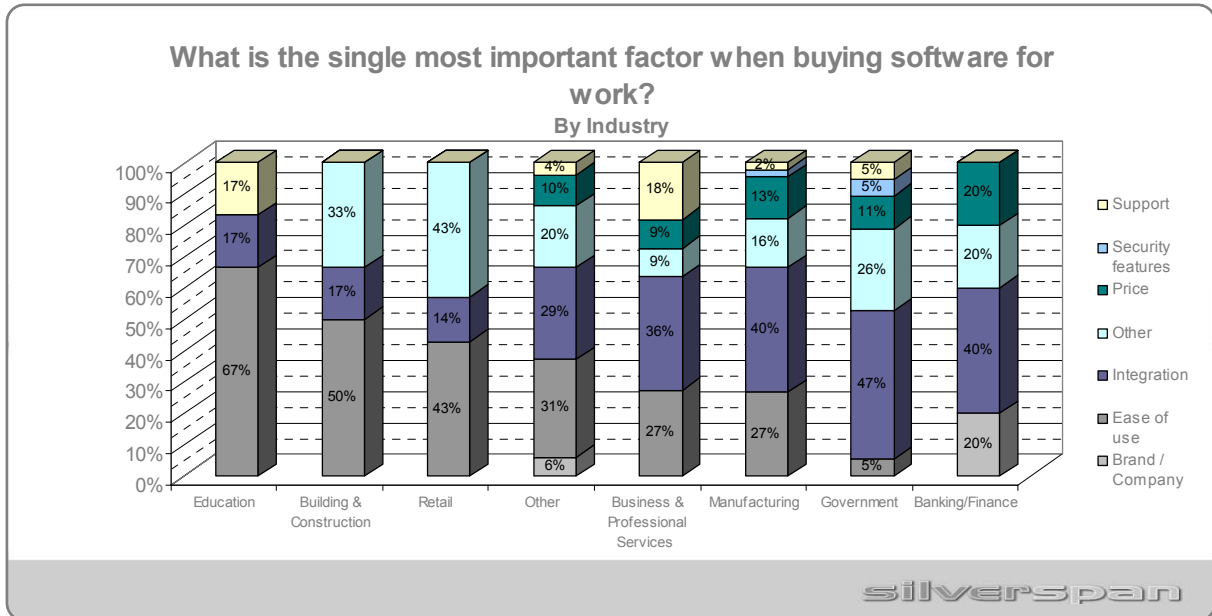


Consistent with previous Silverspan surveys, CEO / Managing directors were the only job-title with more than a negligible likelihood of nominating Brand, with 22% nominating Brand as the most important factor.

Price was not a popular choice as the most important factor, with no respondents from CEO / Managing Directors and Financial decision makers nominating it.

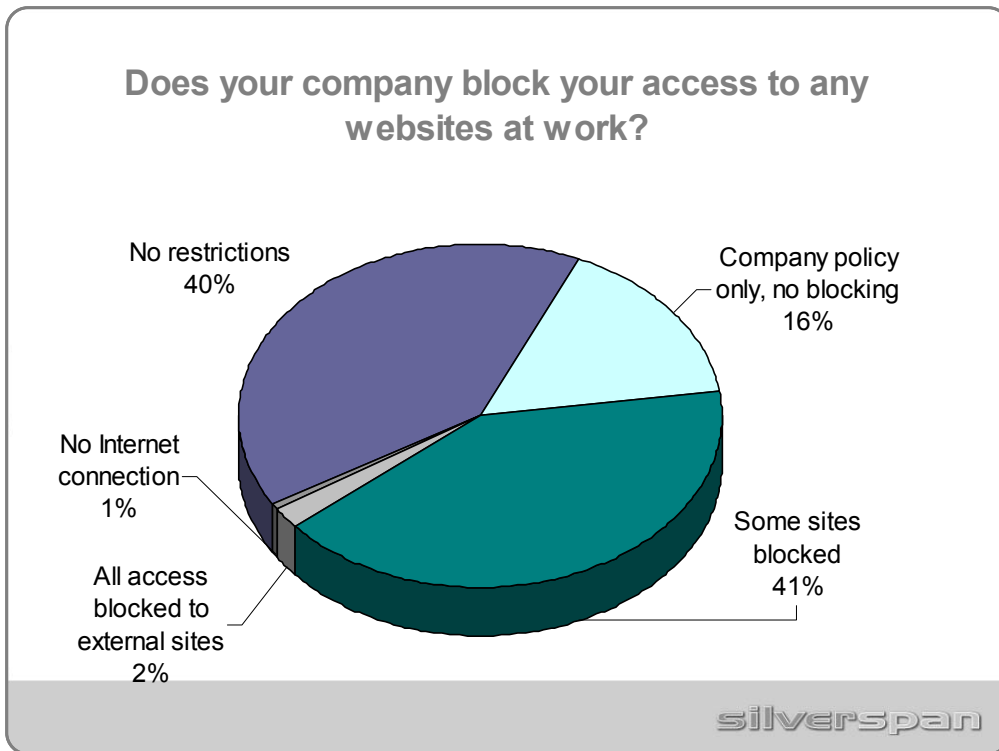


The Government sector was the most likely industry to select Integration / Interoperability as the most important factor (47%), as well as being unlikely to select Brand (0%). Education were most likely to be concerned with "Ease of Use" (67%). Banking / Finance were the most Price sensitive (20%).



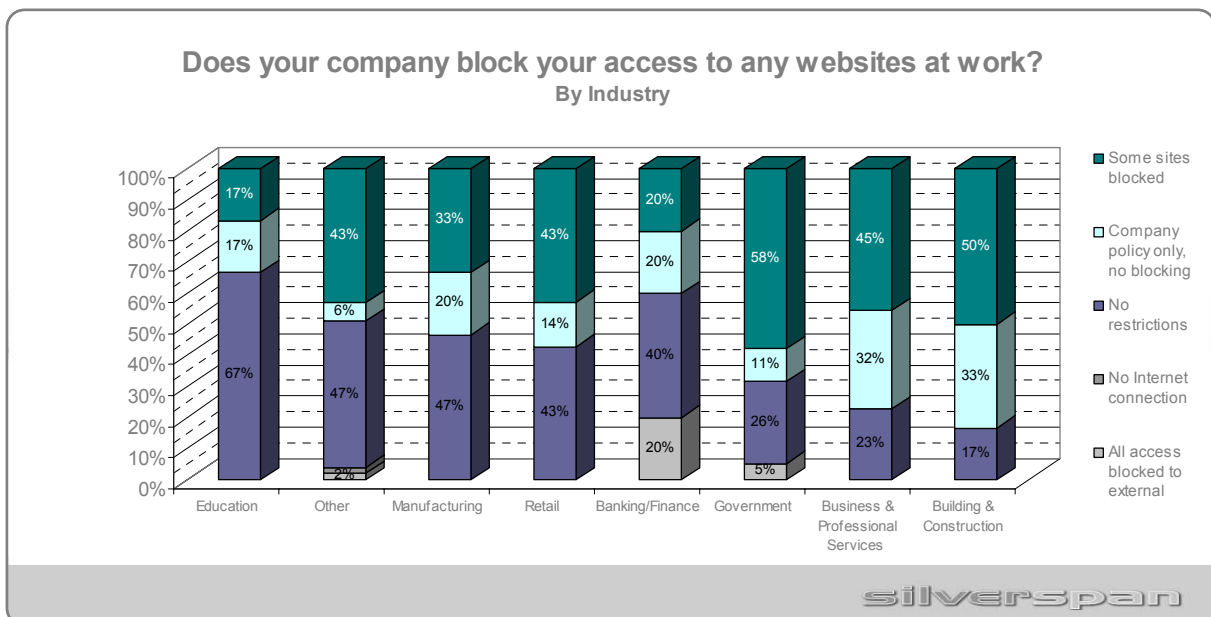
Businesses with fewer than 250 employees were most likely to nominate "Ease of Use" as the primary factor, with organisations with 1-19 employees coming in highest at 60%. Organisations with 1-19 employees were also the organisation size most likely to nominate Brand (20%).

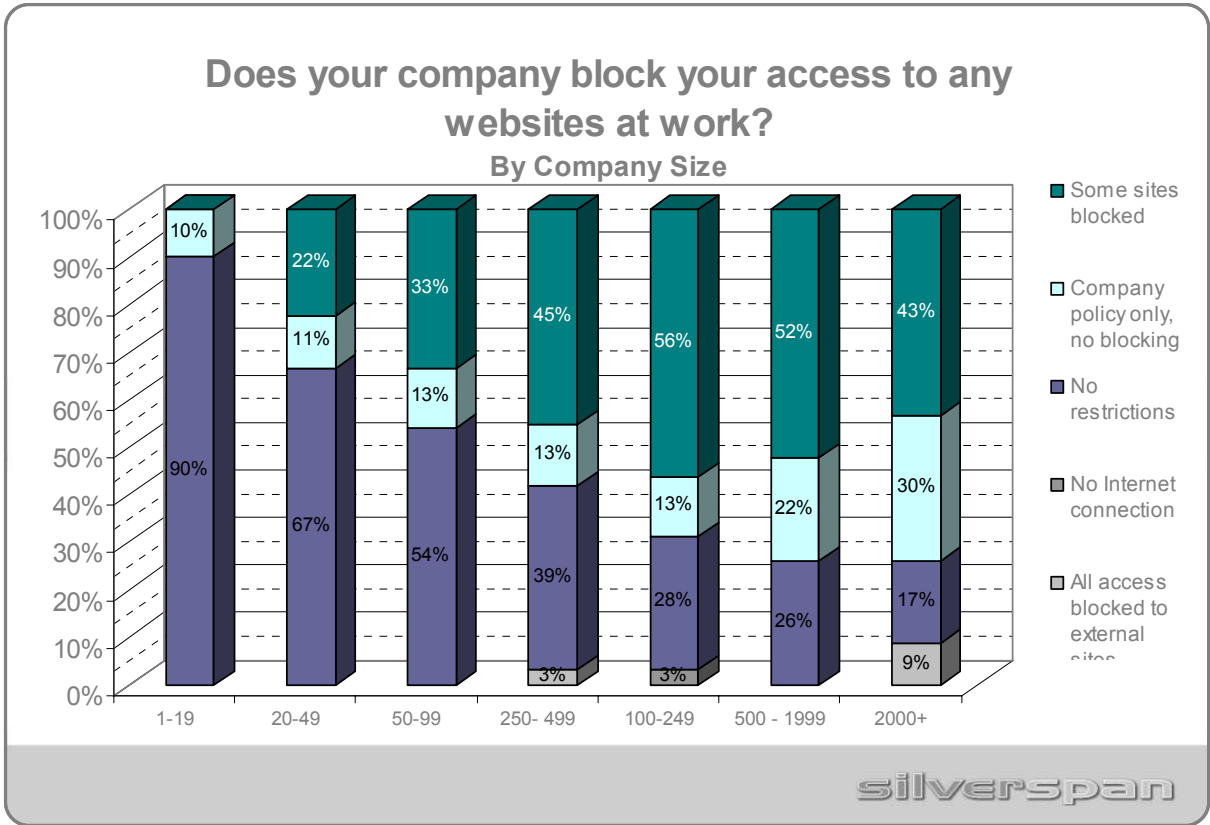
Q12: Does your company block your access to any websites at work?



The most frequent response was "Some Sites Blocked" with 41%.

67% of respondents from the Education sector indicated that no blocking is performed. Building & Construction and Business & Professional Services sector respondents were most likely to nominate that only a "Company Policy" dictating allowable usage was in place, but no actual technical blocking occurs (33% and 32%).

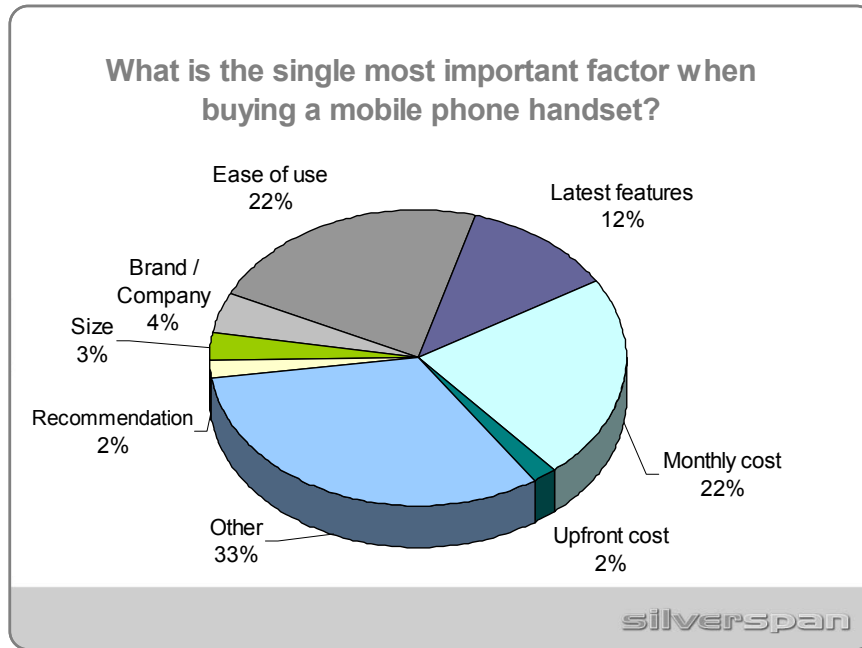




Restrictions on the use of the Internet were found to be closely related to the number of employees. 90% of organisations with 1-19 employees indicated "No Restrictions" of any type. A mere 17% of respondents from organisations with 2000+ staff indicated "No Restrictions".

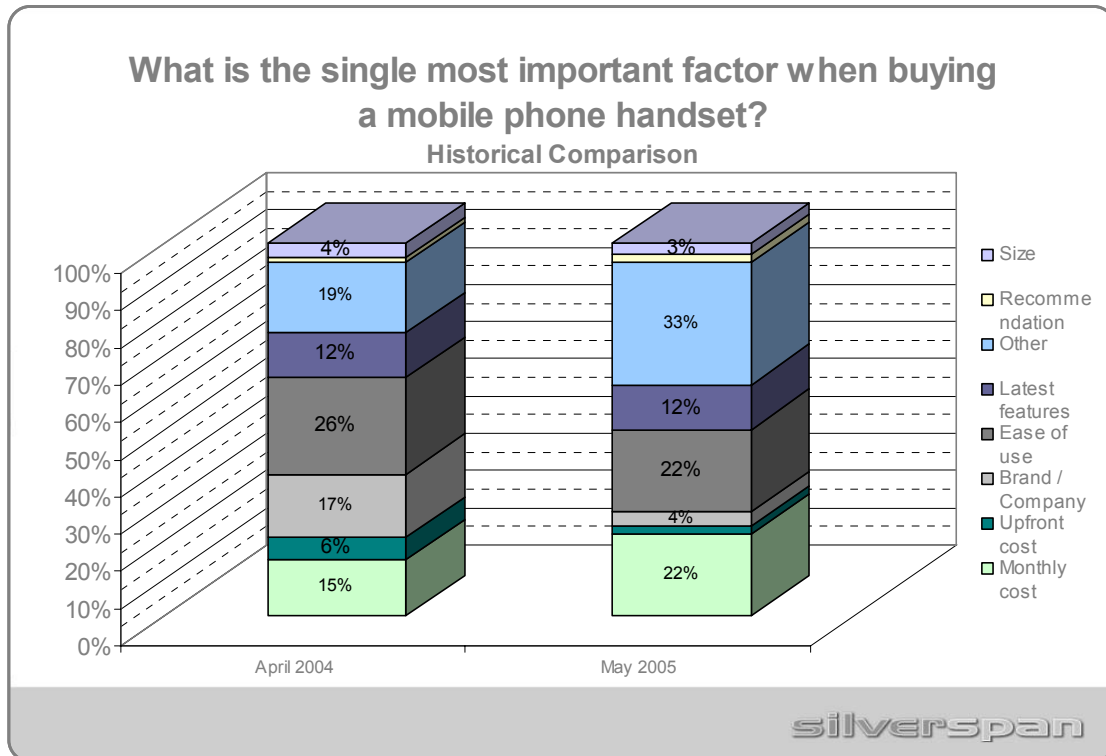
The use of "Company policy" to discourage inappropriate usage was also directly related to company size, ranging from 10% for 1-19 employees to 30% for 2000+ employees.

Q13: What is the single most important factor when buying a mobile phone handset for work?

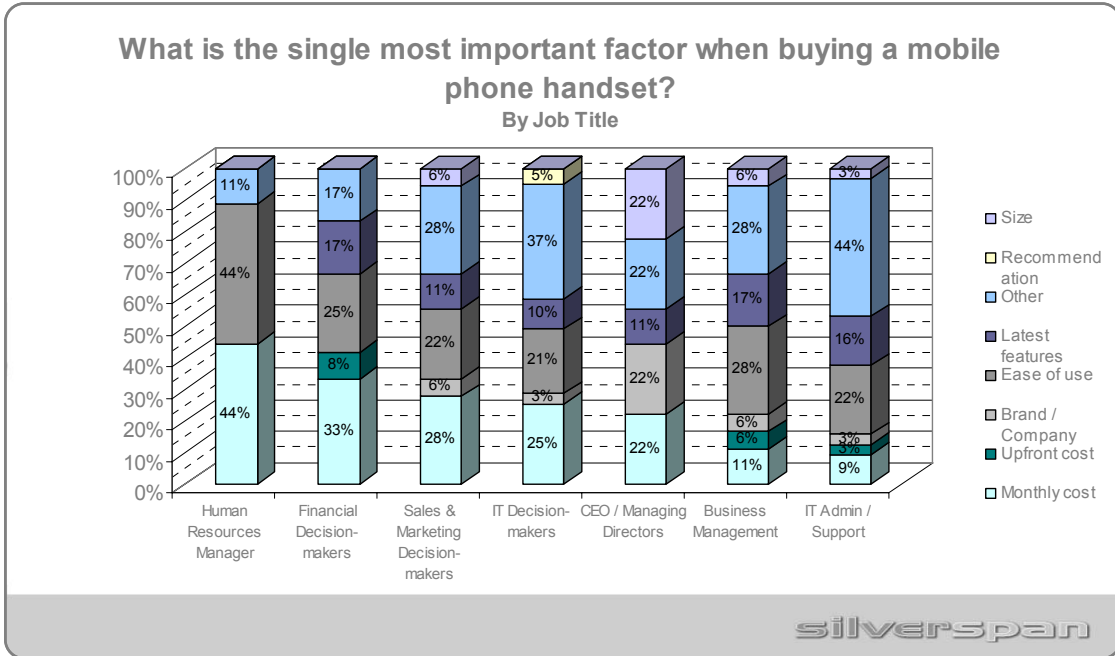


The most frequent response was "Other" (33%). In contrast to purchasing software products, price related concerns were commonly nominated as the most important factor with "Monthly Cost" nominated by 22%.

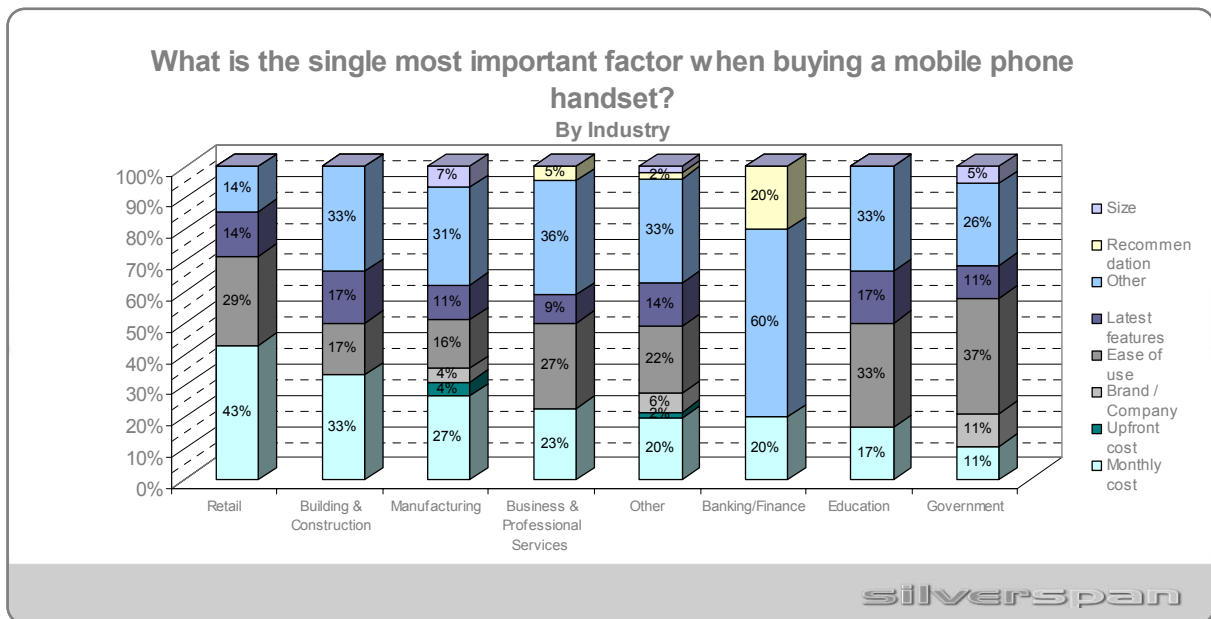
In comparison to previous Silverspan surveys, Brand has dramatically reduced in importance, falling from being selected by 17% of respondents in April 2004 to 4% in May 2005.



Consistent with previous Silverspan surveys, CEO / Managing Directors were the most Brand conscious job role (22%), and IT Admin/Support were the least likely to nominate any type of Cost, with only 12% of IT Support respondents selecting a Cost based factor.

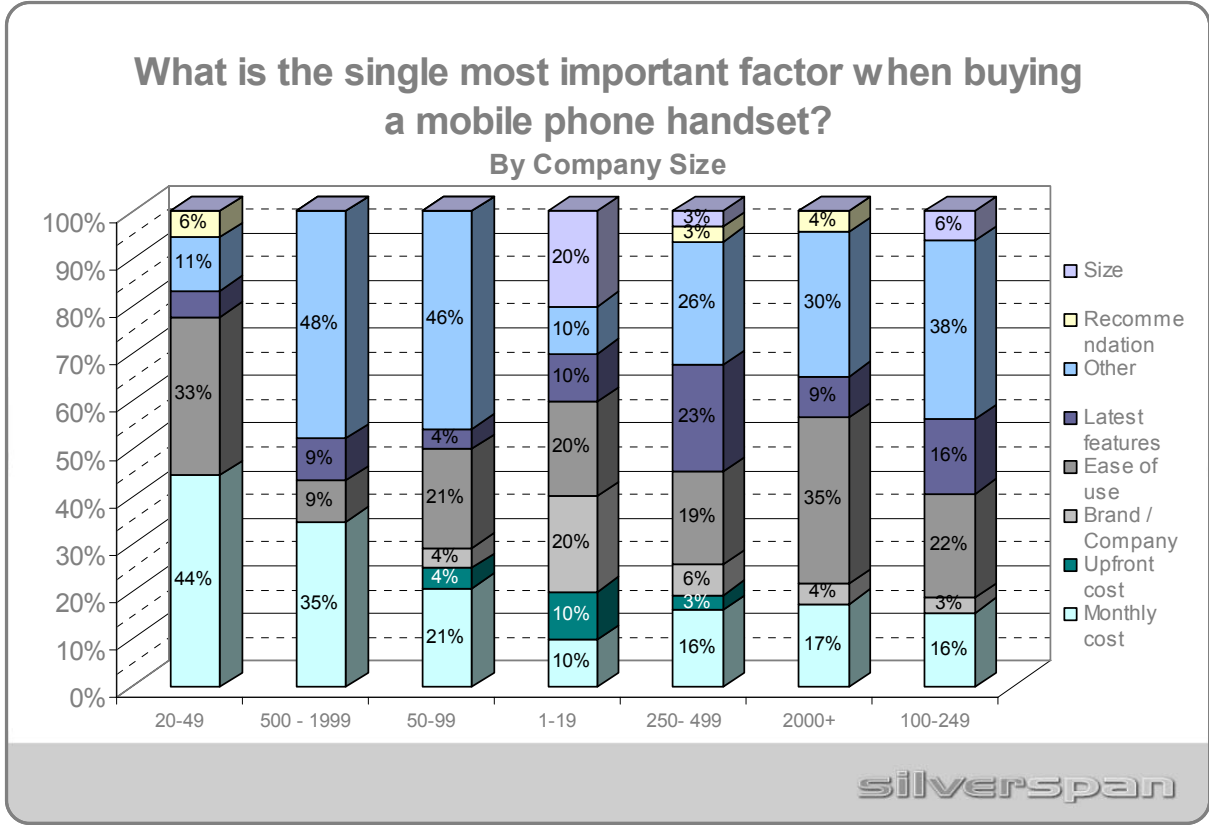


Respondents from the Retail sector were most likely to nominate a Cost related factor (43%). The most Brand conscious industry sector was Government (11%).

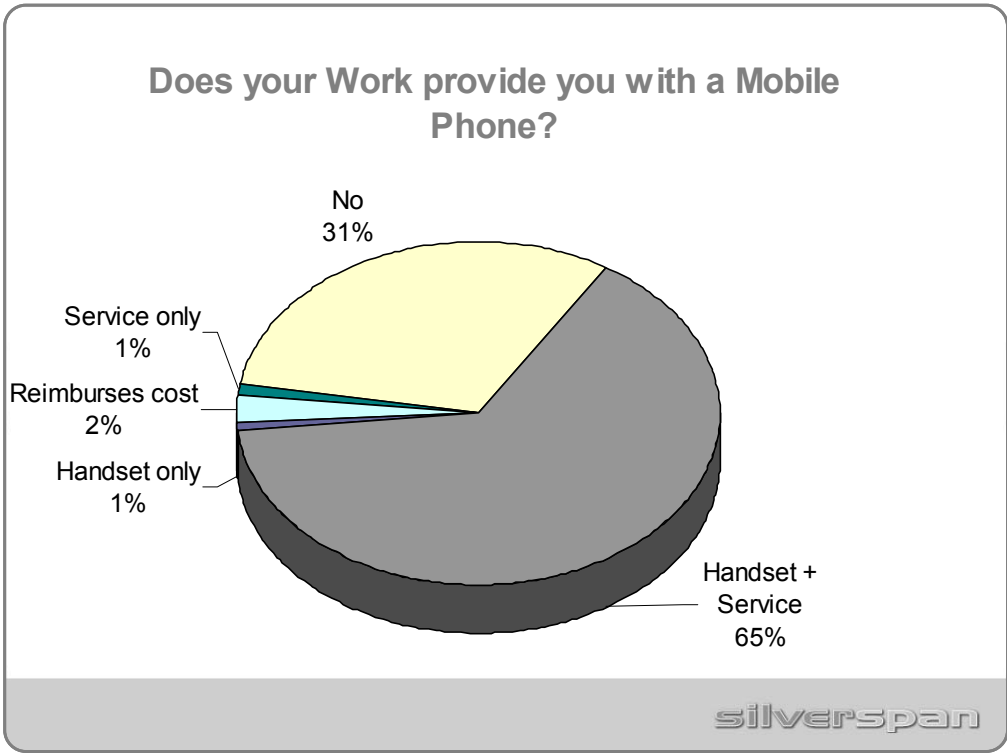


When analysed by number of employees, respondents from companies with 1-19 employees were by far the most likely to nominate Brand (20%).

Organisations with 20-49 employees were most price conscious, with 44% nominating "Monthly cost" as the most important factor.

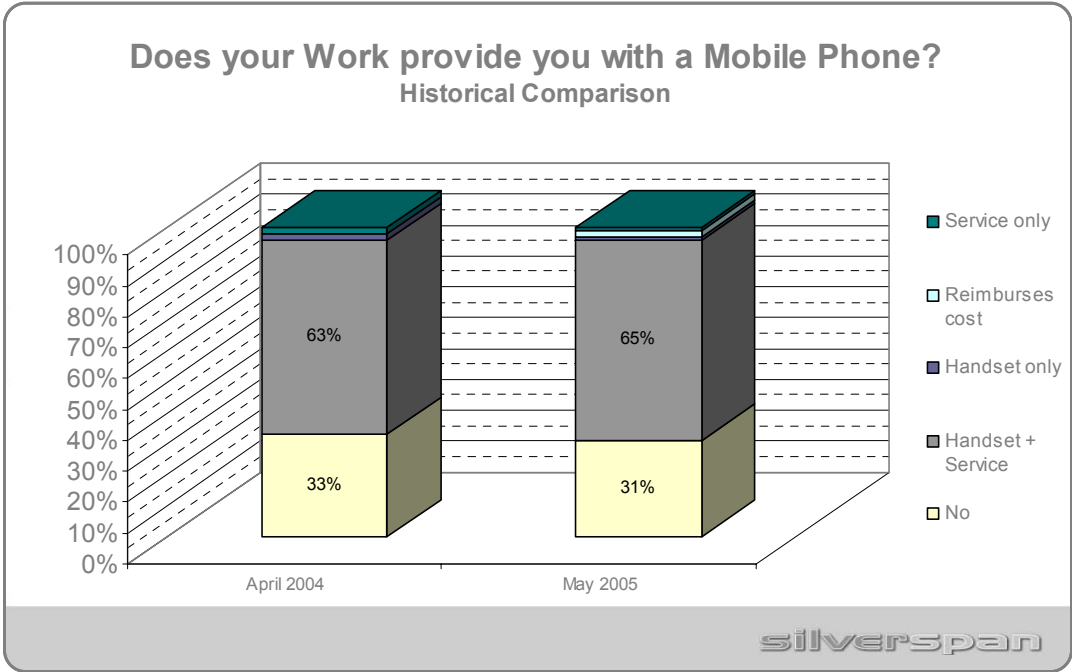


Q14: Has your Work provided you with a mobile phone?

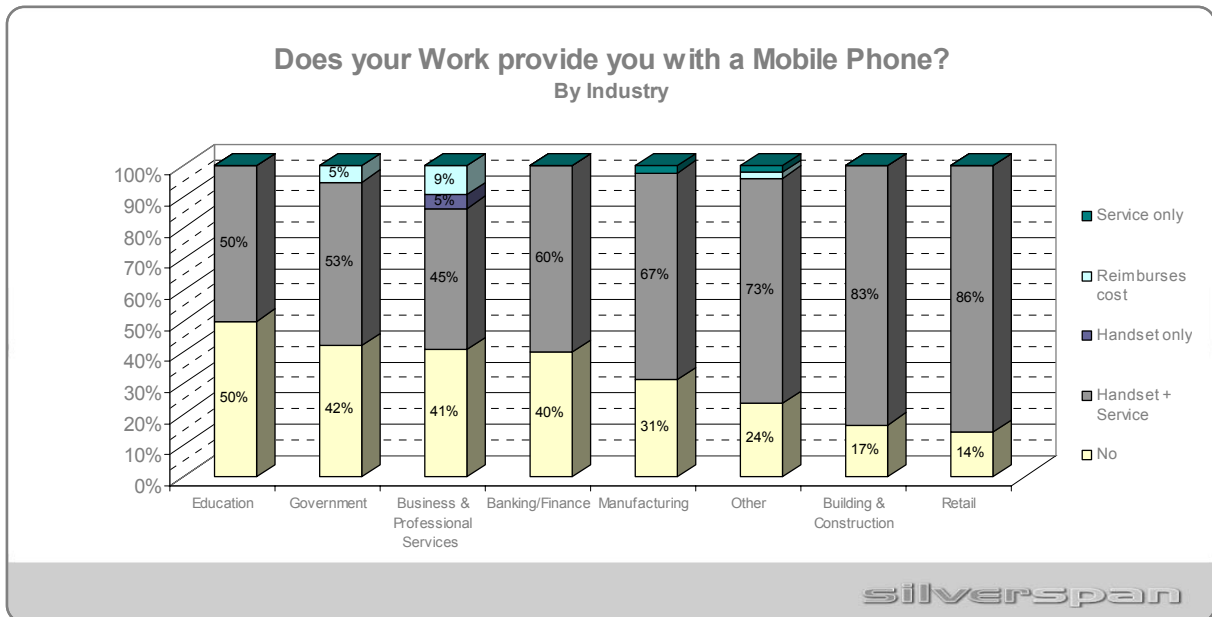


The most frequent response was "Handset & Service" provided (65%).

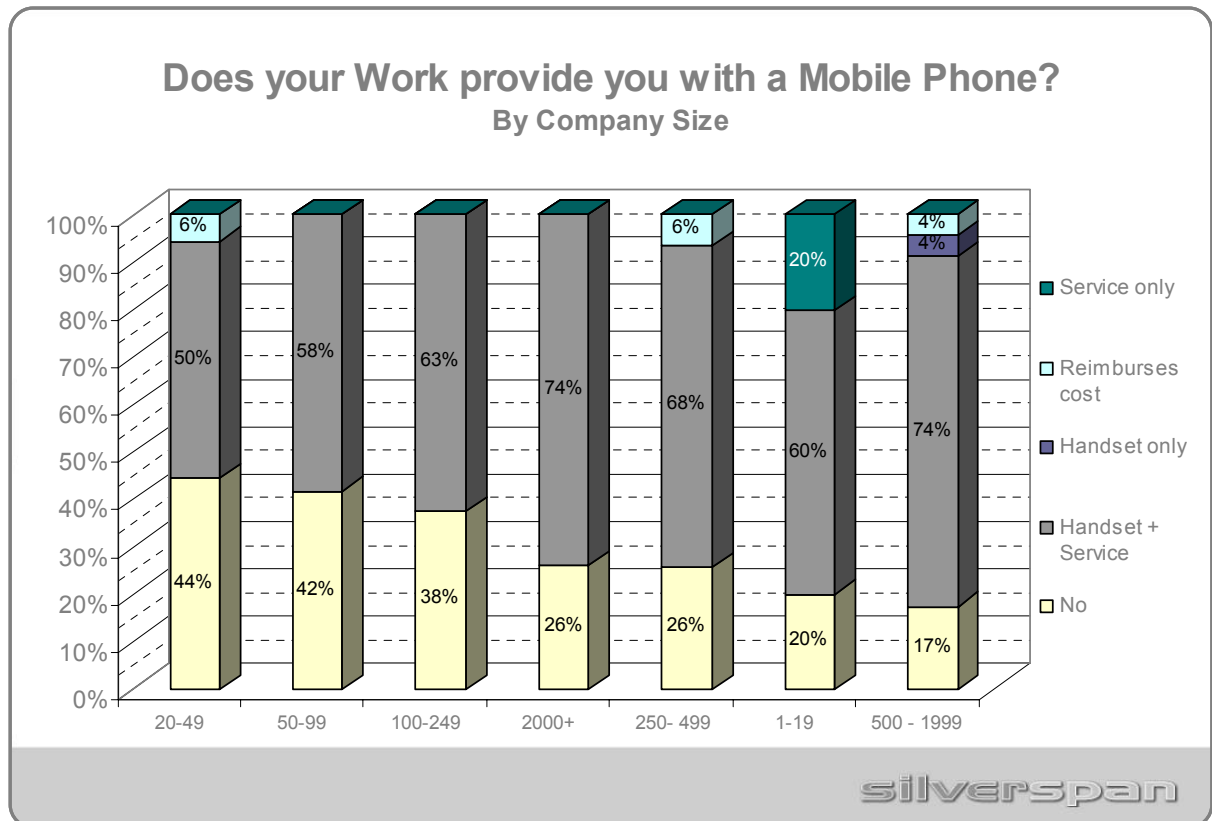
In comparison to previous Silverspan survey results, there results were remarkably static, with no significant overall changes.



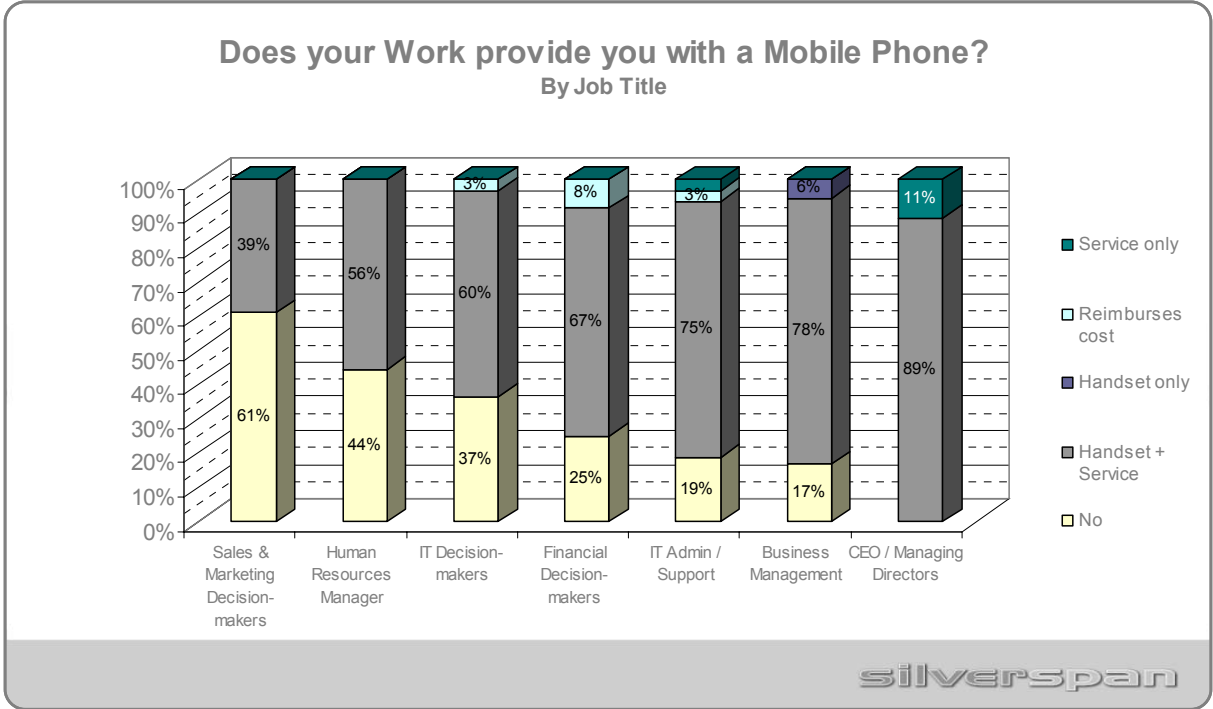
Respondents working for companies in the Retail and Building & Construction sectors were the most likely to have responded Handset & Service (89% and 83%), while Education sector employees were the least likely (50%).



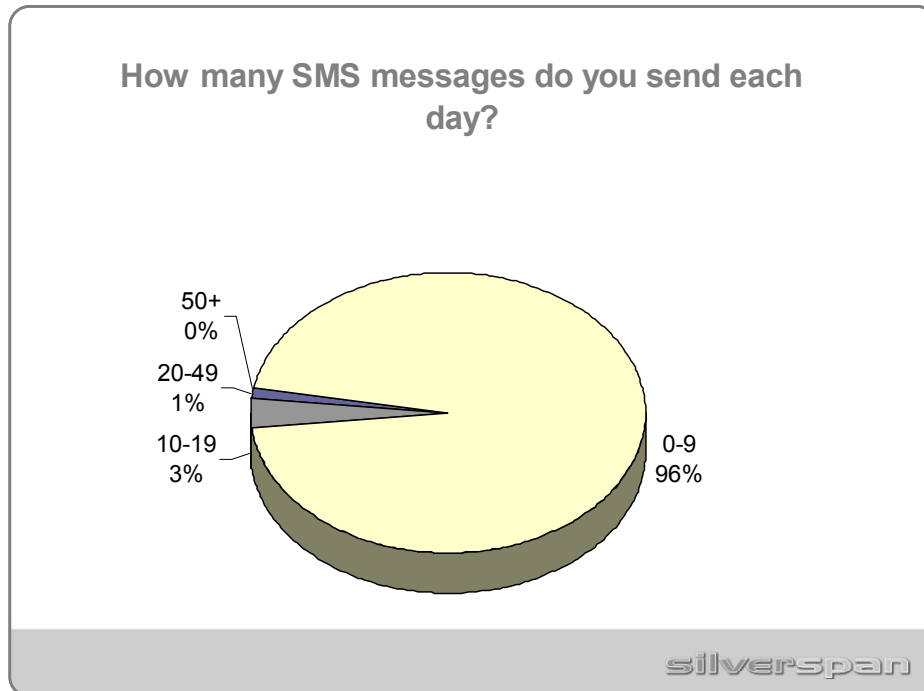
When analysed by number of employees, organisations with 1-19 employees were the only group likely to nominate "Service only", as well as being the most likely to provide a mobile phone with only 20% indicating "NO". Organisations with 500+ employees were the most likely to be provide "Handset + Service" (74%).



Sales & Marketing and Human Resources respondents were the least likely to be provided with a mobile phone (61% and 44%). CEO/Managing Director were the most likely, with 100% being provided with a mobile phone or service.

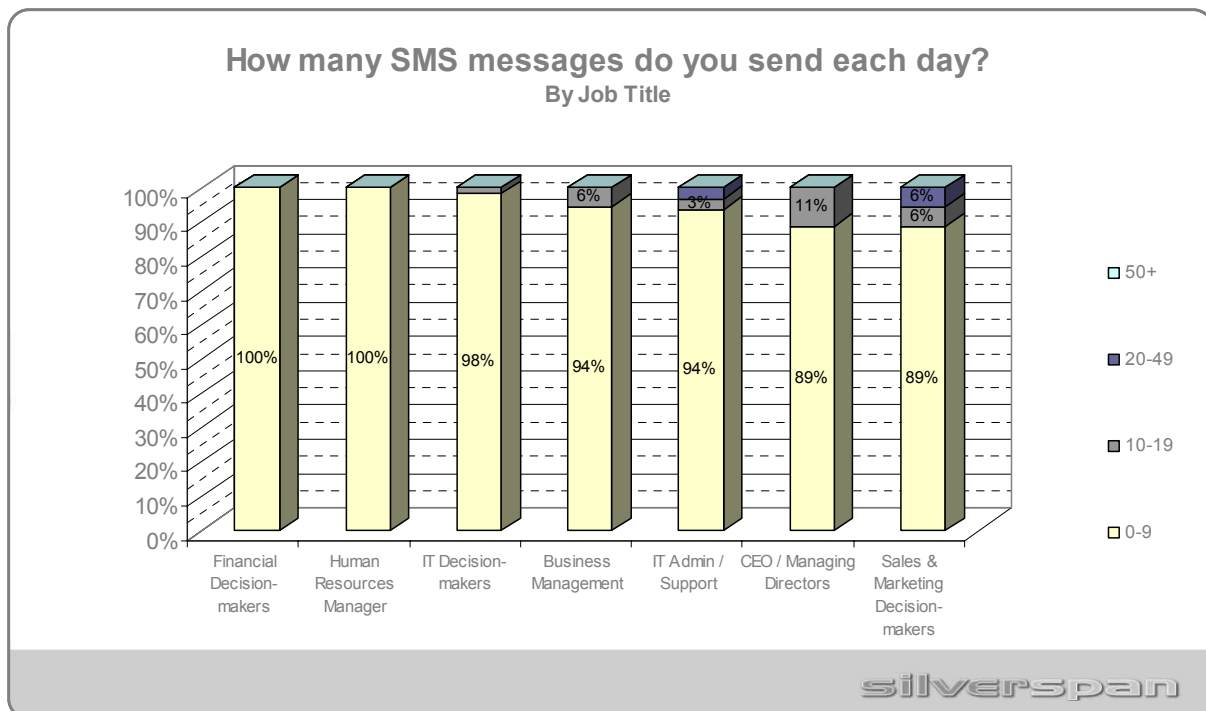


Q15: How many SMS mobile phone messages do you send on average each day?

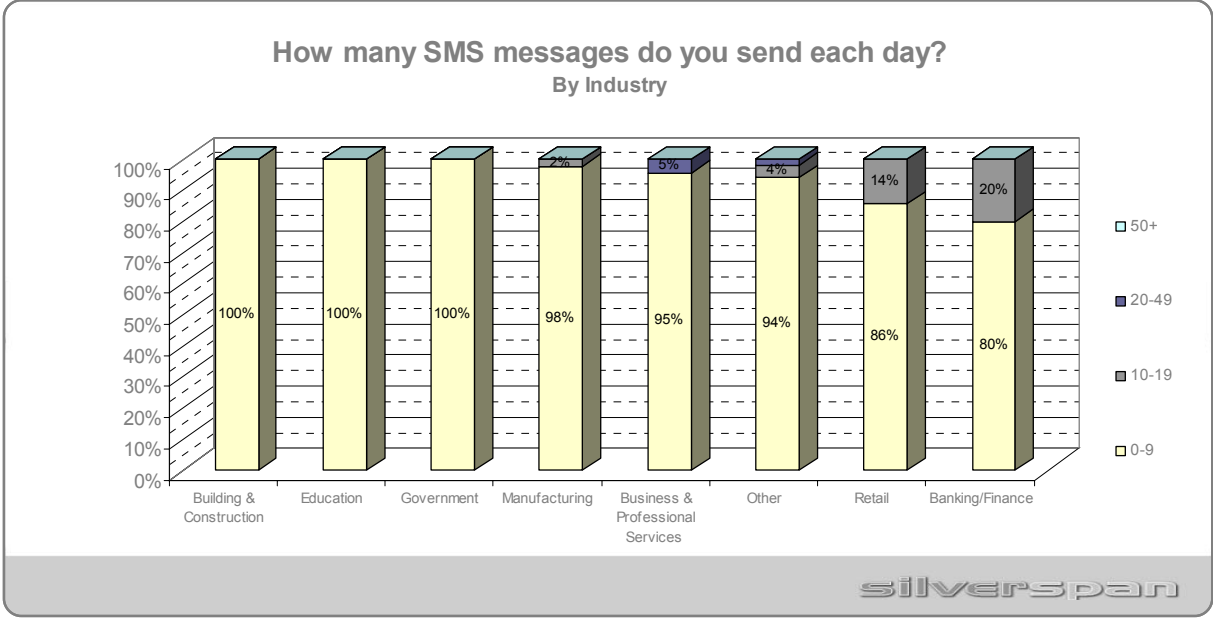


Sending SMS text messages was found to be very unpopular amongst Australian Business Managers. 96% responded "0-9" messages.

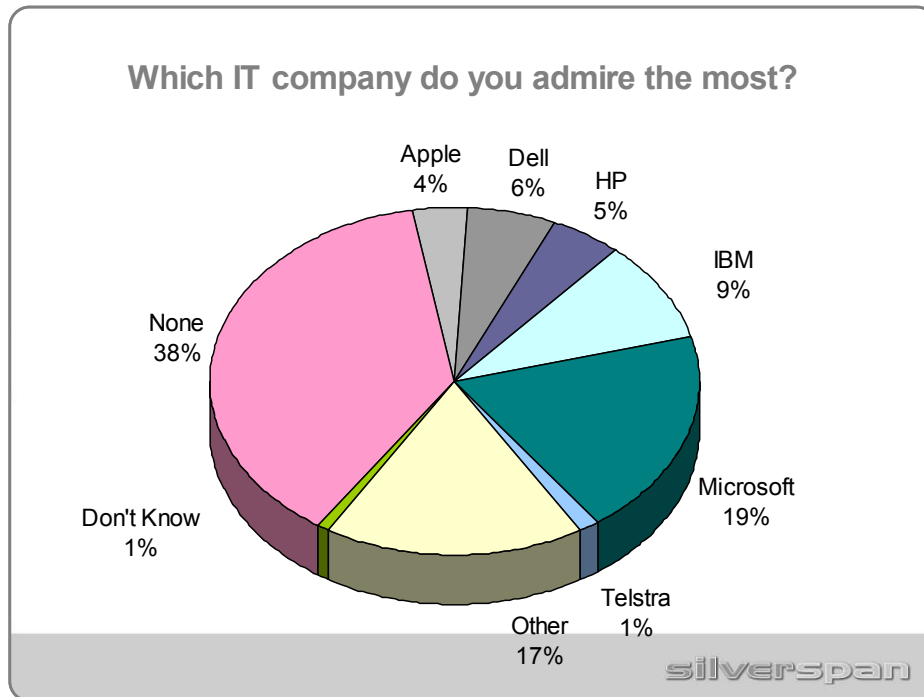
Sales & Marketing and CEO/Managing Director respondents were the most likely to send more than 10 messages per day (11%).



Respondents from Banking/Finance and Retail were the most likely to indicate that they sent 10+ messages per day (20% and 14%).



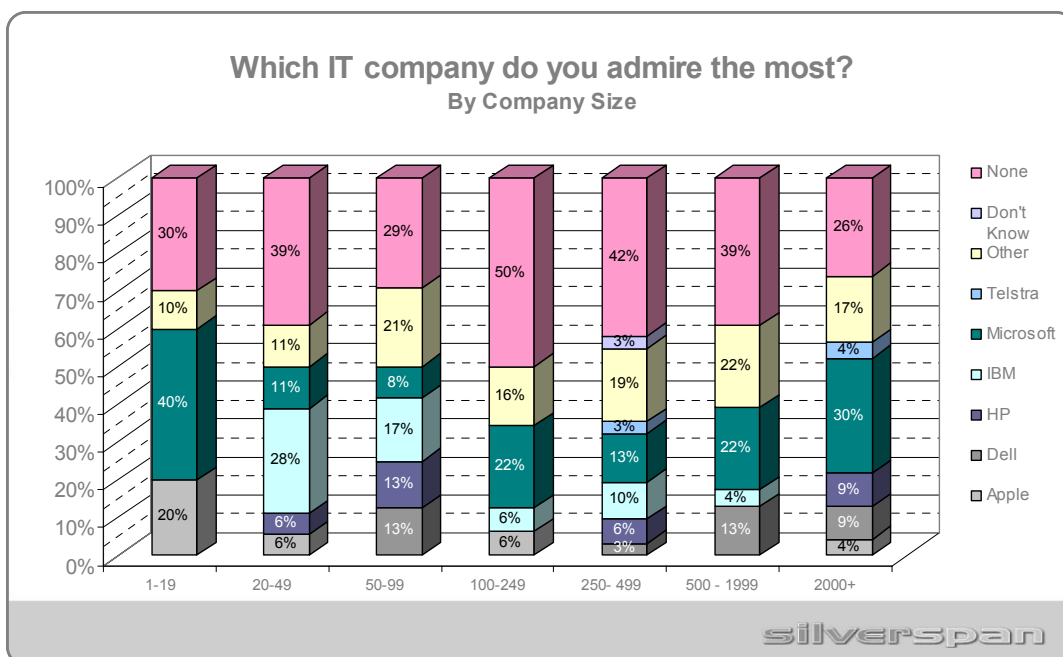
Q16: Which IT company do you admire most?



Microsoft was the clear favorite, a position that has been shown very consistently in previous Silverspan surveys, being nominated by 19% of interviewees. IBM, Dell and HP were also selected frequently, with 9%, 5% and 6% respectively.

38% of those interviewed replied with "None" for this question, indicating that there were no companies that they admired.

The "Other" category includes companies with less than 1% of total responses. Companies that fell into this category included AMD, Cisco, Dimension Data, Genesys, Google, iiNET, ISS, LogicaCMG, Redhat, RSA, SAP, Sophos, Sun Microsystems, Toshiba, and Volante.



Silverspan is a specialist marketing agency, delivering marketing services for the IT and Telecommunications industry.



We have a simple philosophy:

Marketing is pointless if it doesn't help you to achieve your revenue and margin goals.

Our goal is to provide exceptional marketing advice and services so that you can focus on your customers.

Areas of Marketing and Technology Expertise

- Enterprise software
- Computer equipment
- Networking technologies
- Voice technologies
- Telecommunications services
- IT security products
- e-Business solutions
- IT related professional services



Services we offer

Marketing Strategy

- Consultancy
- Business Plans
- Market Research
- Product Management
- Target account profiling

Database marketing

- In-house Silverspan database or 3rd party data
- Opt-in and permission marketing
- Outsourced database services
- Data cleaning

Public and Media Relations

- Press Releases
- Case Studies
- Media Relations
- Crisis Handling

Lead Generation

- In-house Telemarketing
- Postal based campaigns
- Electronic campaigns
- Integrated Campaigns
- Opportunity qualification

Channel Marketing

- Consultancy
- Partner recruitment
- Campaign design and execution

Brand

- Brand Design and Corp Image
- Brochures, Posters, Business Cards, Mailers, sales tools
- Corporate gifts

Event management and promotion

- Seminars and Launches
- Roadshows
- Conferences
- Parties

Advertising

- Consultancy
- Media Planning, Price Negotiation
- Advertising design
- Online marketing