



An Coimisiún um
Rialáil Cumarsáide
Commission for
Communications Regulation

Mobile Consumer Experience

Survey of Consumers
Summer 2019



RESEARCH
& INSIGHT





Key Highlights

Key Highlights – Ownership, Tenure, Switching



Just **1 in 4** have ever switched mobile network, with switching continuing to under index in sample 5 areas (1 in 5 switchers changed network in last 12 months – highest is sample 1).



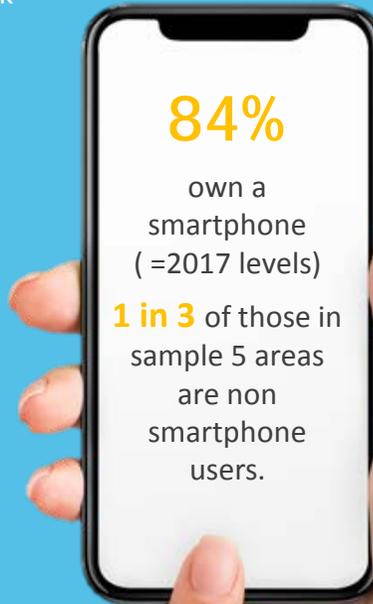
80% of non-switchers have **never** considered switching



55% of those who switched provider, but kept **their handset** experienced an improvement in network coverage.



36% of phones are **3+ years old** (people living in areas 3,4 & 5 have older phones - Non smartphones are also much older).



84%

own a smartphone
(=2017 levels)

1 in 3 of those in sample 5 areas are non-smartphone users.



Almost universal mobile ownership with **6 in 10** operating the prepay. The latter correlated with younger & older ages and lower socio-economic groups.



71% of mobile users have been with their mobile network for **3+ years** - sample areas 3,4 & 5 have highest proportion of 3 + year tenure customers (the 50+ age group and Vodafone also over index on 3+ years).



Family & friends being on a network has replaced price as the main rationale for choosing network (albeit this could be related to price). 1 in 5 referenced any coverage - higher in areas 2,3,4 & 5.

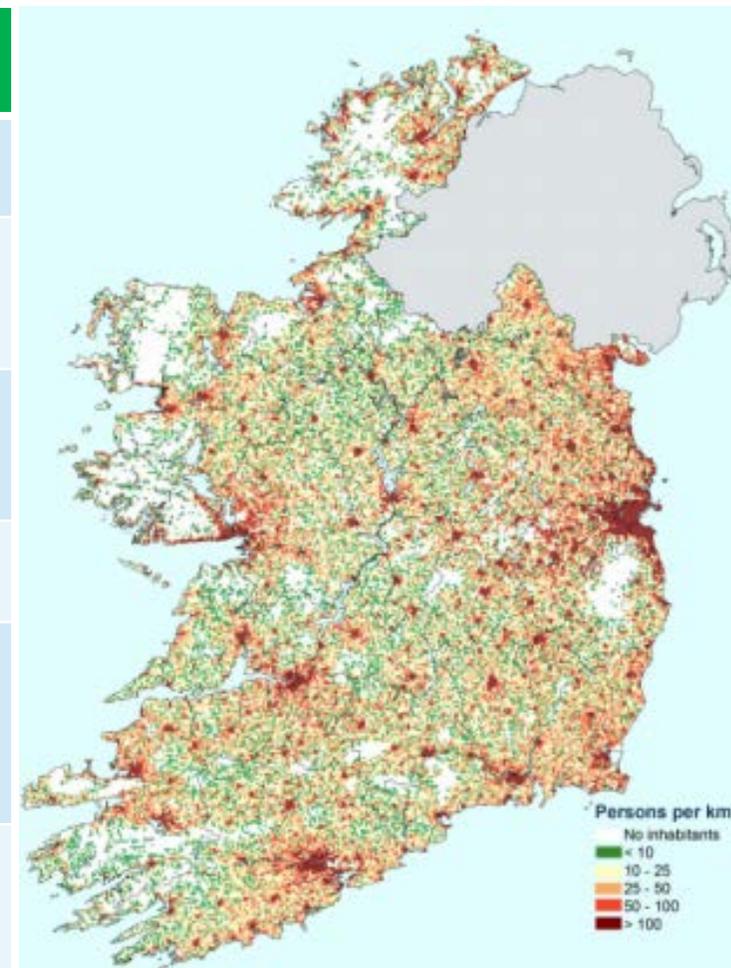


Introduction

- Fieldwork for this study was conducted during June 2019.
- In order for the research findings to be comparable with the [2017 mobile customer experience](#) review, a similar methodology was utilised.
- Survey data collection methodology was ‘face to face’ interviewing via CAPI (Computer Aided Personal Interviewing). All interviewing was administered at the respondents’ own home – 2,838 respondents were interviewed in total.
- The total sample was split across five distinct segments, based on population density, with a higher proportion of interviews being conducted in areas of lower population density (the sample size by segment has been detailed overleaf).
- Within each segment interlocking quotas were applied across gender and age to ensure that the findings are fully representative of Irish adults aged 18+ living in each area. Note, the 2017 study was based on all adults aged 15+. Thus, the 2017 data has been rerun based on all adults 18+ and the charts have been updated for comparability.
- The change in age qualification was due to the inclusion of a consent form that would enable ComReg to request consumers’ data usage information from their mobile network provider. The consent form was discussed with respondents, at the end of the interview so not to impact upon the data.
- A corrective weight has been applied to the data within each segment to ensure that it is fully representative of all adults. The total sample of 2,838 has also been amalgamated and weighted back in line with the total population aged 18+ (the weighting applied has been detailed on the next page).
- Margin of error on a sample of 2,838 is +/-2%pts. For smaller sub samples the margin will be greater.
- Significance testing to 95% confidence level has been applied to the data and is highlighted throughout this presentation. In tables, green highlighting = significantly higher result than total result, while red highlighting = significantly lower result than total result.

Sample size and population density

	Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
Sample Size	511	511	600	715	501
Population Density	>100 per Sq. Km	<100 and >50 per Sq. Km	<50 and >25 per Sq. Km	<25 and >10 per Sq. Km	<10 per Sq. Km
Total Population (2016)	2,899,576	507,773	650,521	475,702	54,680
Sq. Km	4,839	7,412	18,940	27,362	9,912
Number of Electoral Divisions (circa)	777	342	849	1,162	296
Example EDs	South Dock Dublin City	Mitchelstown Co. Cork	Durrow Co. Offaly	Anner Co. Tipperary	Glenfarne Co. Leitrim



Source: CSO, Census 2011



A note on reading the charts

Base sizes on each chart refer to the unweighted base i.e. the raw number of interviews, as significance testing is based on the raw number of interviews. The charted data refers to the weighted percentages as this is the percentage representative of all adults aged 18+ who fall into that category.

Some sample sizes have been identified as a small base size. These have been asterisked throughout the report. A small base size is defined as 50 responses or less, as base sizes less than this are not statistically robust.

Responses to all questions have been included however some have a very small base size and caution should be used when reviewing as these will not be significantly robust.

In some cases percentages will not add up to 100%, this will be due to multi-coded responses where a respondent selected more than one response or due to rounding if +/- 1% of 100%.

With regard to questions which capture estimated values, the estimate is the average amount given by all respondents who answered that question.

Sample Detail

- Interviews achieved and corrective weighting applied.

	No of interviews				
	Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
Total	511	511	600	715	501
*Gender	No.	No.	No.	No.	No.
Male	233	249	291	355	256
Female	278	262	309	360	245
*Age					
18-24	47	44	44	60	43
25-34	93	82	86	86	41
35-49	166	177	185	193	143
50-64	109	121	150	203	139
65+	96	87	135	173	135
*Socio-economic status					
ABC1	368	238	372	395	278
C2DE	138	165	175	215	150
F	5	18	53	105	73

	Weighting applied				
	Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
	66%	10%	13%	10%	1%
	%	%	%	%	%
	48	49	50	51	52
	52	51	50	49	48
	12	10	9	9	9
	21	15	14	13	12
	30	31	30	29	26
	21	25	26	27	28
	16	19	20	22	25
	70	61	61	55	54
	29	36	30	31	30
	1	3	9	15	15

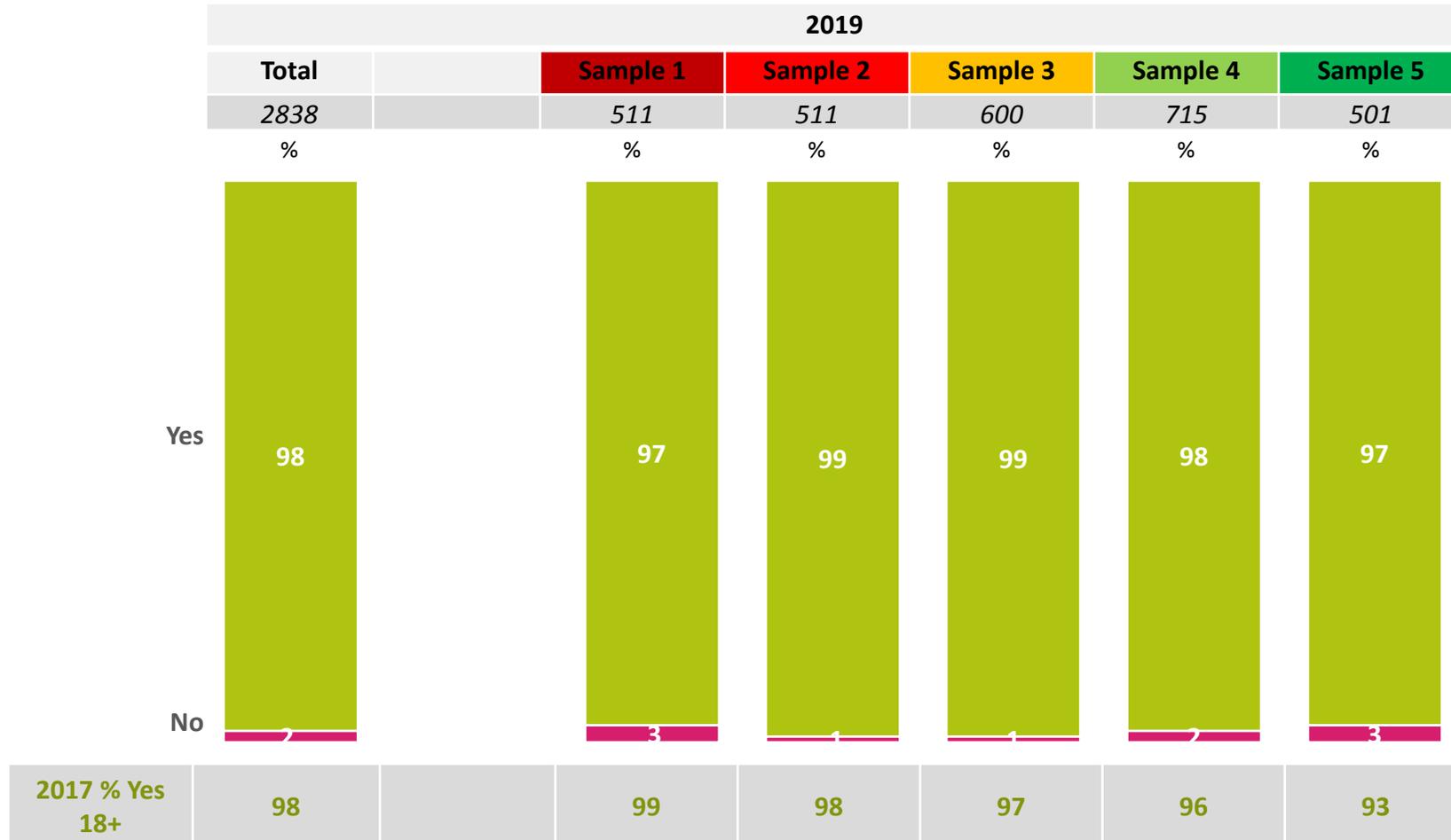
Note the Age profile is older in more rural areas



Services in the home

Mobile phone ownership x segments

Base: All adults aged 18+: 2,838



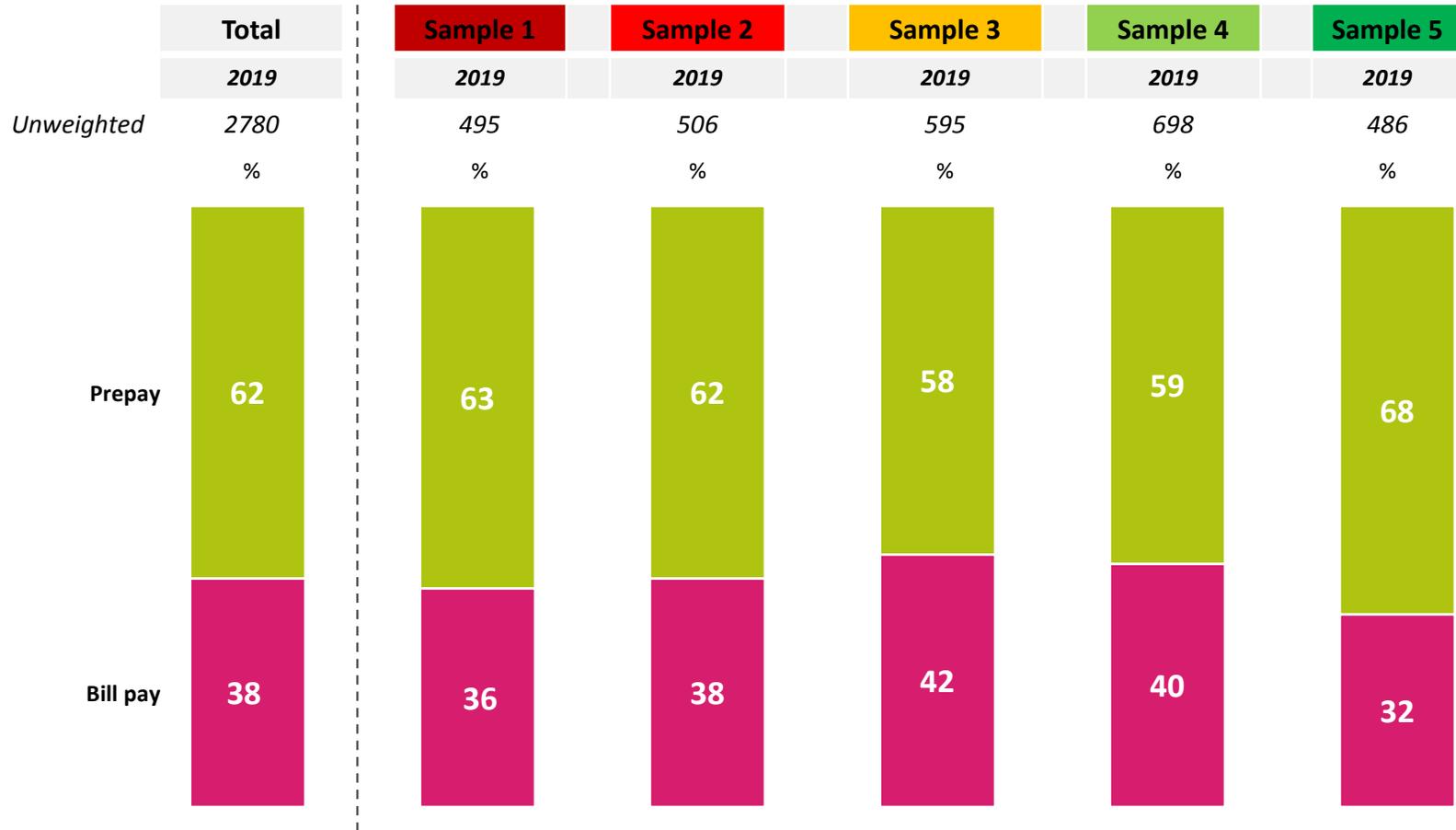
Mobile phone ownership x demographics 2019

Base: All adults aged 18+: 2,838



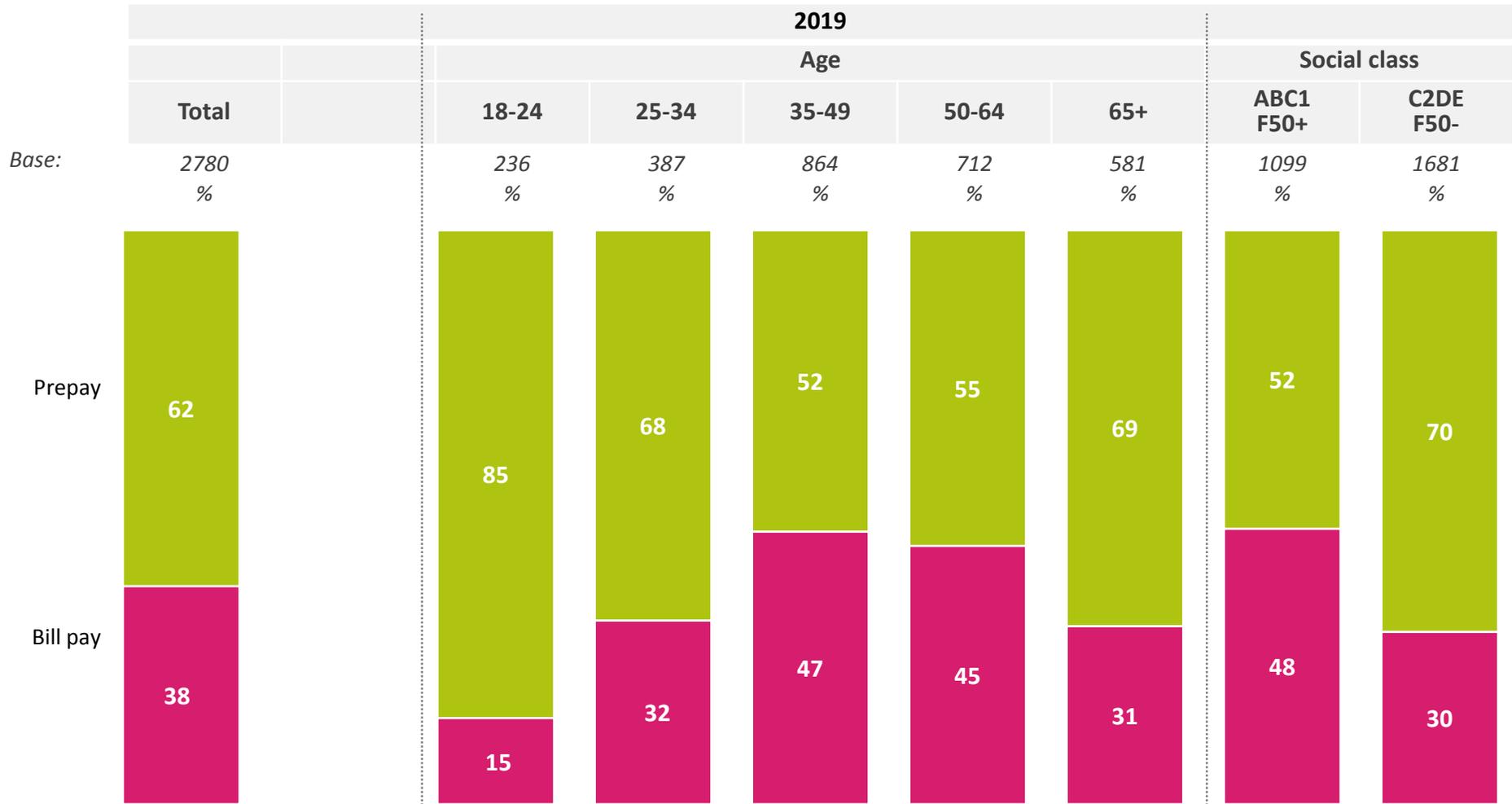
Incidence of prepay package vs bill pay mobile phone package x Samples

Base: All have mobile: 2,780



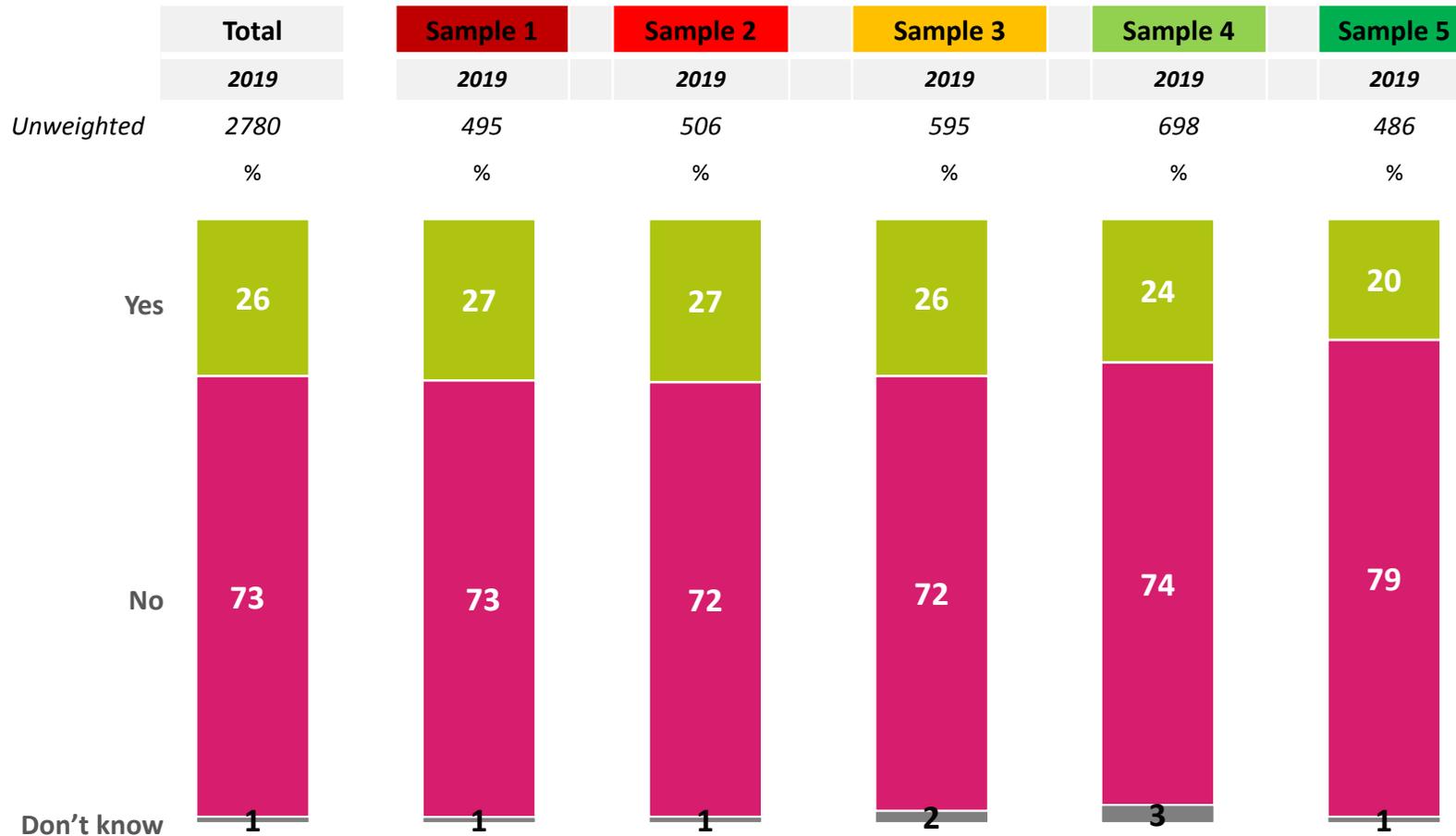
Incidence of prepay package vs bill pay mobile phone package x demographics (2019)

Base: All have mobile : 2780



Incidence of phone being included in payment contract x Samples

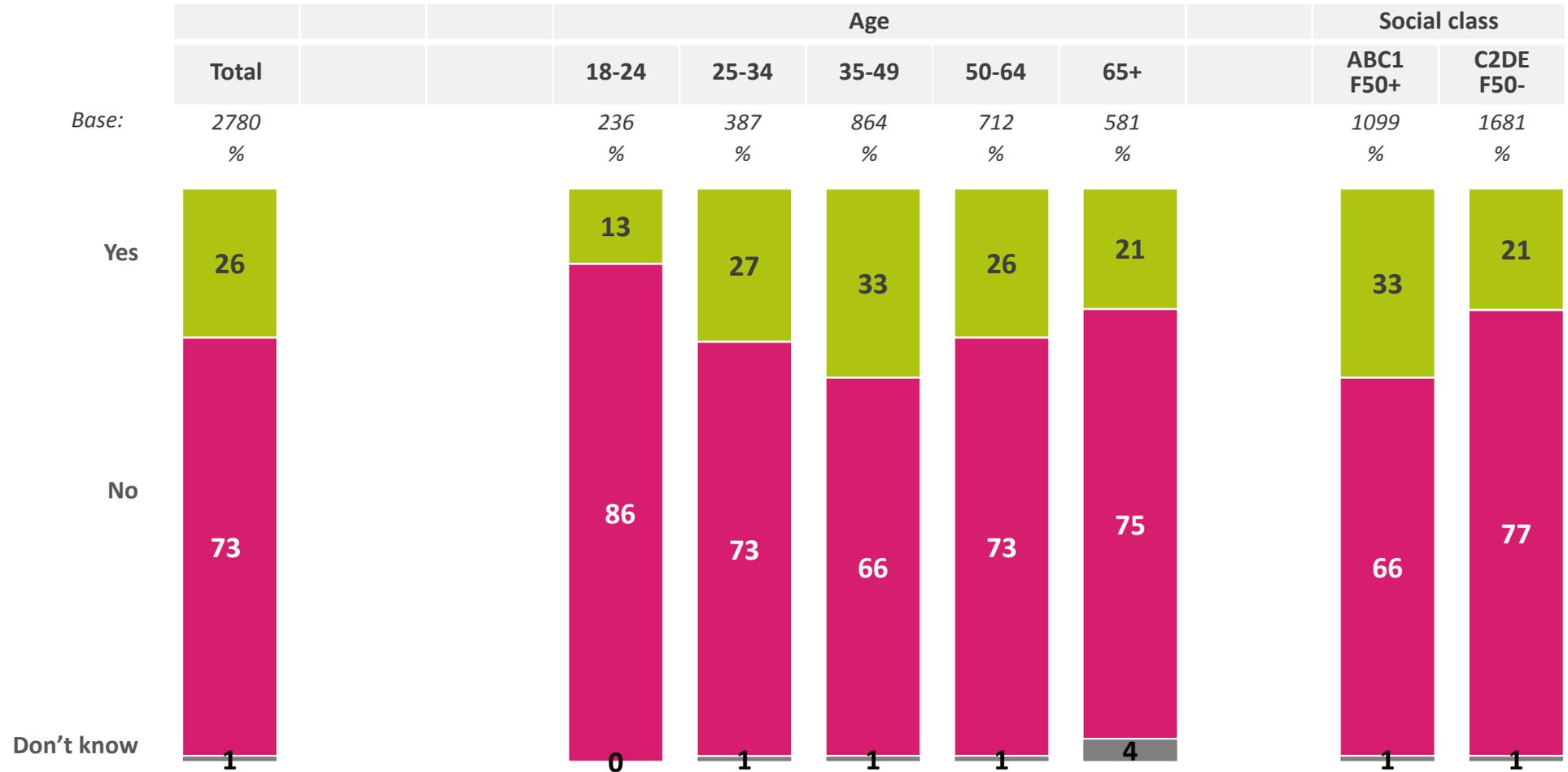
Base: All have mobile: 2,780



***Question added 2019

Incidence of phone being included in payment contract x demographics (2019)

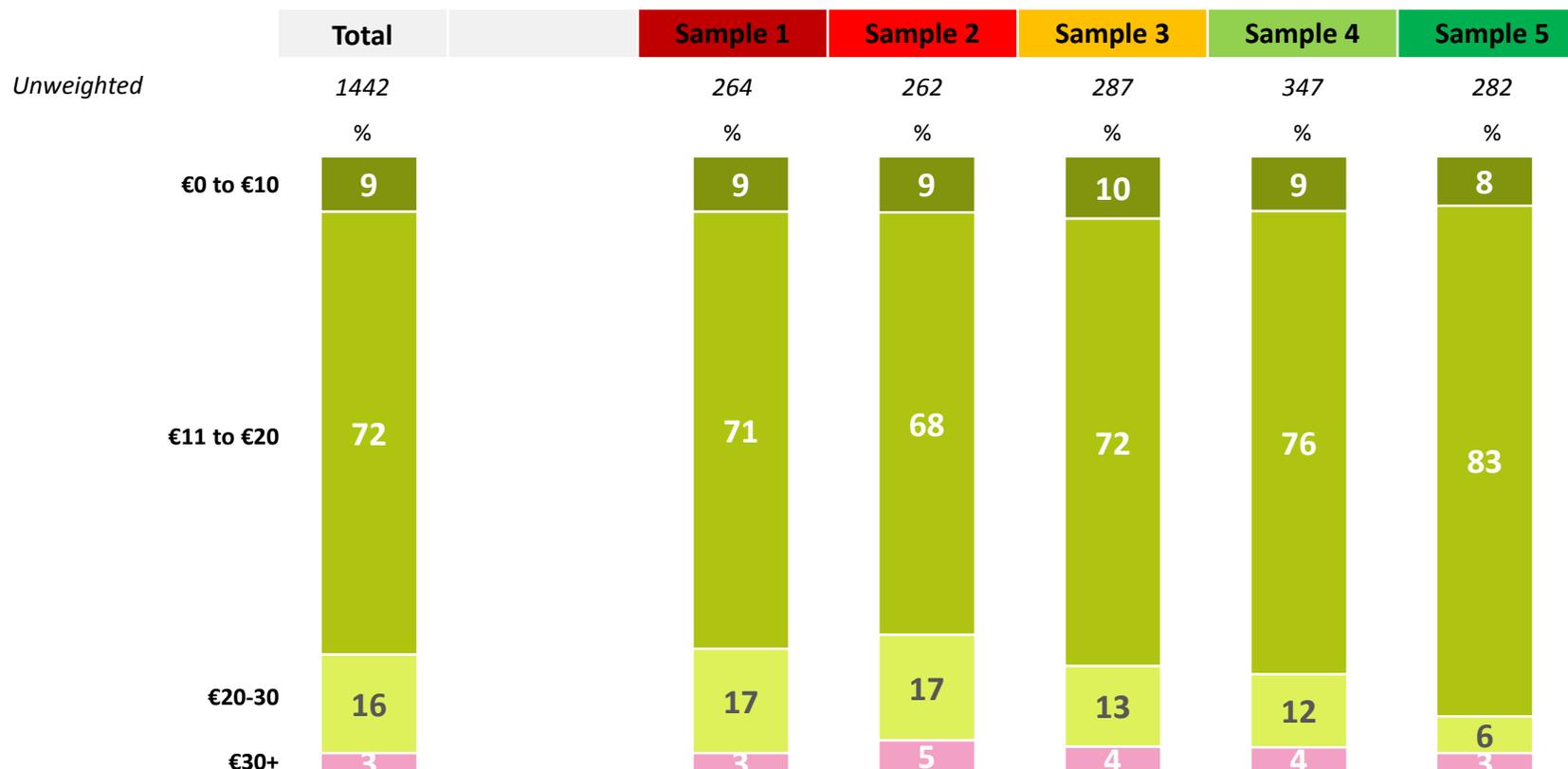
Base: All have mobile: 2,780



***Question added 2019

Monthly Prepay spend on mobile phone top up

Base: All prepay mobile phone users: 1,442



2019 Mean	€20.79	€20.76	€21.46	€20.63	€20.62	€20.04
2017 Mean	€20.58	€20.44	€20.30	€20.90	€21.06	€21.93
2019 Median	20	20	20	20	20	20
2017 Median	20	20	20	20	20	20
2019 Standard deviation	7.75	7.90	8.37	6.90	7.13	5.87
2017 Standard deviation	7.53	7.52	7.45	8.46	6.15	7.66



Q11 In a typical month, how much do you spend on mobile phone top ups (ie buying credit) with _____ (INSERT MAIN OPERATOR)? Exclude any roaming charges or if you are bundled in with home/landline or broadband. RECORD IN EURO.

Monthly Prepay spend on mobile phone x demographics 2019

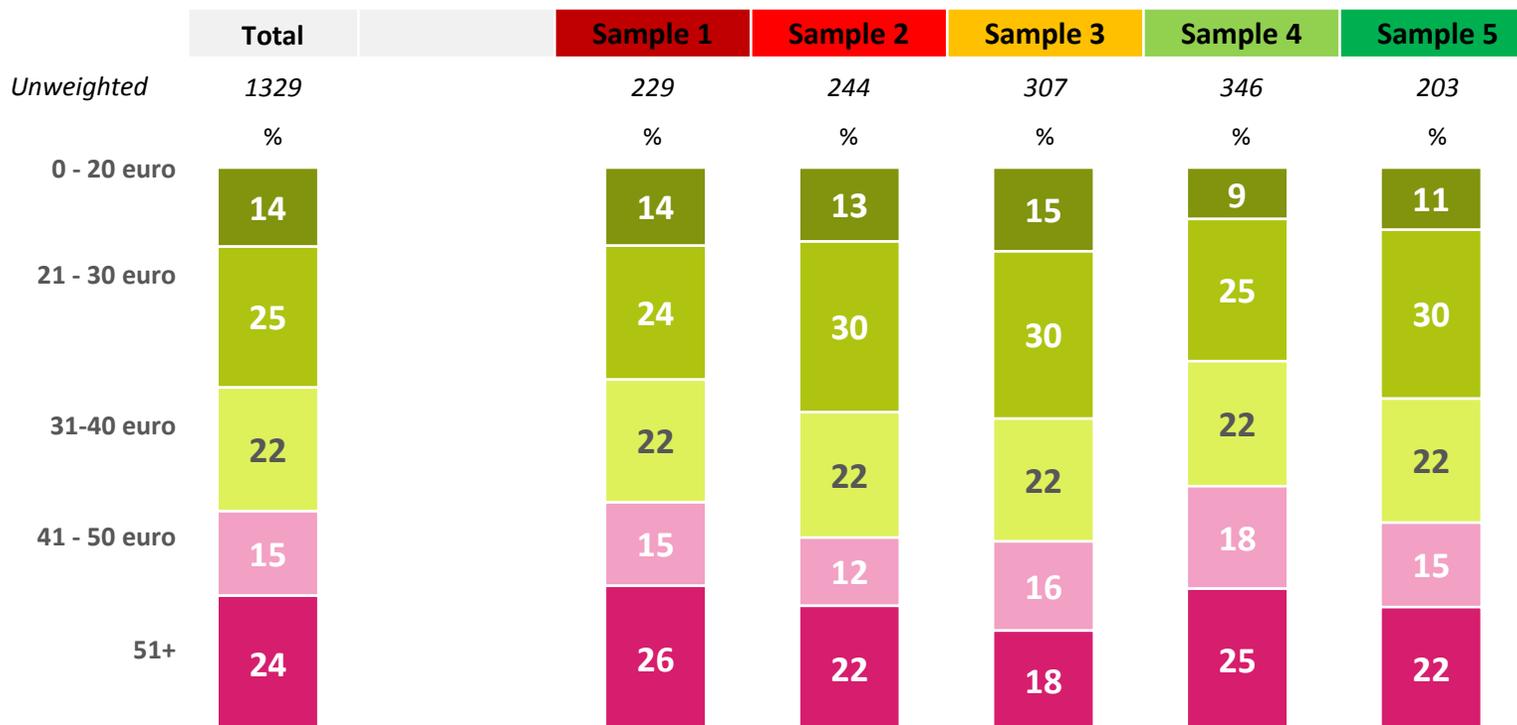
Base: All prepay mobile phone users: 1442

	Total	Age					Social Class	
		18-24	25-34	35-49	50-64	65+	ABC1 F50-	C2DE F50+
<i>UNWTD</i>	1442	181	201	324	357	379	432	1010
	%	%	%	%	%	%	%	%
0-10	9	5	3	7	7	24	9	9
11-20	72	74	74	71	75	64	72	72
21-30	16	19	21	18	15	8	17	16
31+	3	3	2	4	3	4	3	3
Mean	20.79	21.79	21.42	20.88	21.05	18.86	20.88	20.75
Median	20.00							
Standard deviation	7.75	8.17	5.87	7.35	8.49	8.57	7.78	7.73



Monthly billpay spend on mobile phone bill x segments

Base: All billpay mobile phone users: 1,329



2019 Mean	€42.31	€43.05	€41.70	€38.98	€43.07	€43.51
2017 Mean	€40.28	€38.63	€40.91	€47.89	€39.26	€43.36
2019 Median	37.00	37.00	35.00	35.00	40.00	35.00
2017 Median	35.00	35.00	40.00	40.00	35.00	42.00
2019 Standard deviation	23.64	24.00	24.04	20.58	23.93	30.16
2017 Standard deviation	33.33	18.40	18.61	76.12	17.10	17.81

ALL BILLPAY CODE AT Q9

Q12 In a typical month, what is your monthly mobile phone bill from _____ (insert main operator)? Exclude any roaming charges or if you are bundled in with home/landline or broadband.



Average monthly billpay spend on mobile phone 2019

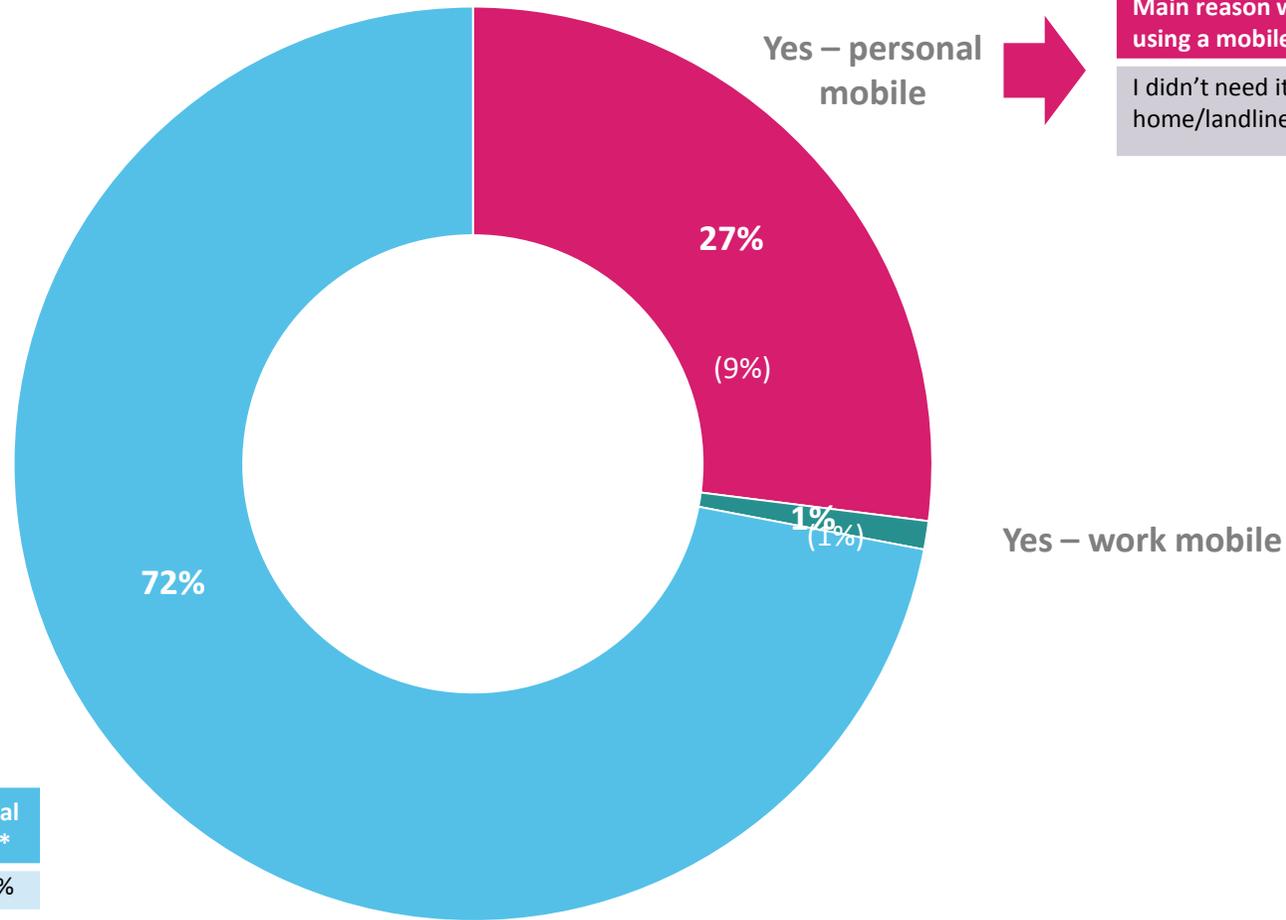
Base: All billpay mobile phone users: 1329

Average monthly billpay spend x Demographics



Incidence of previously having a mobile phone

Base: All without a mobile phone: 58*



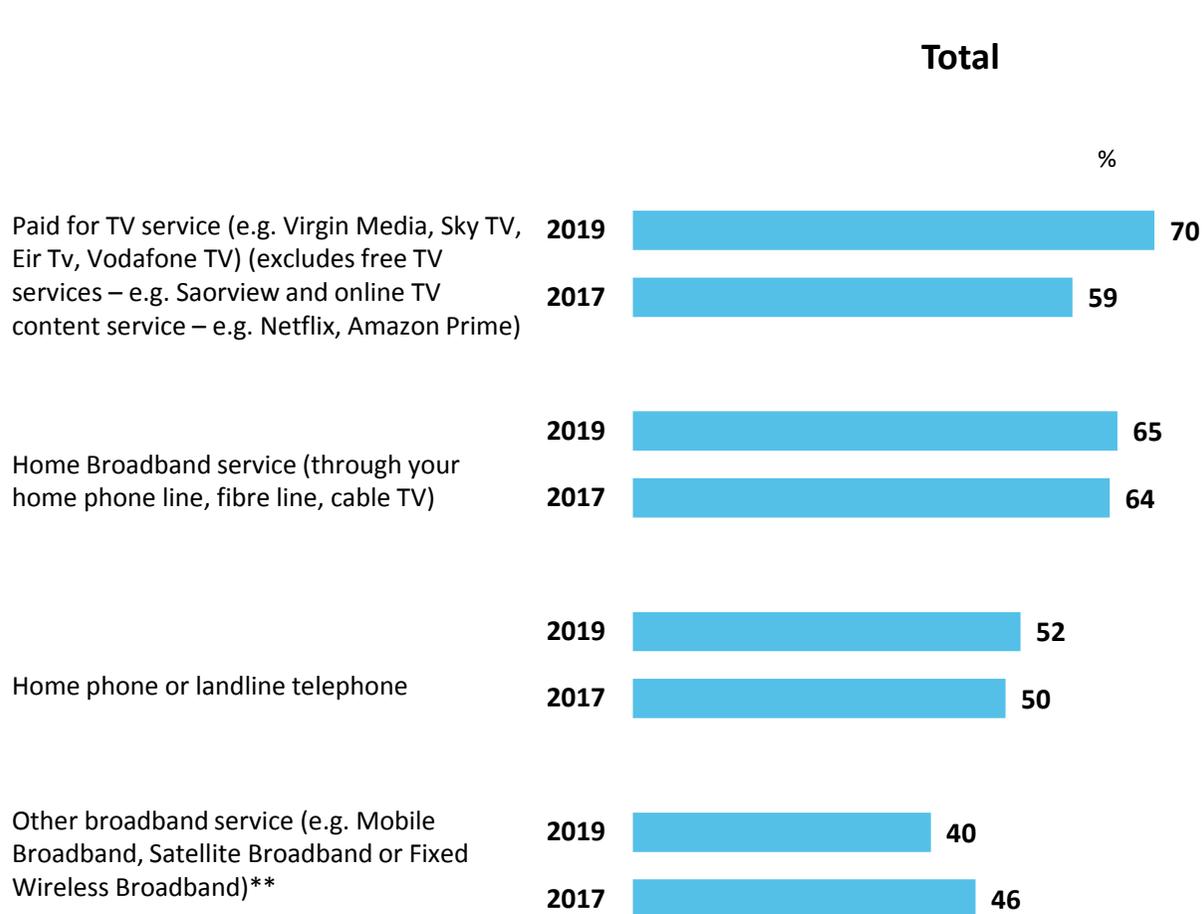
() = 2017 18+
*Caution: small base

- Q.2 Did you ever have a mobile phone?
Q.3 What was the main reason you stopped using your mobile phone?
Q.4 Is there a reason for never having had a mobile phone?



Ownership of services in the home x Segments

Base: All adults 18+: 2838



	Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
	511	511	600	715	501
	%	%	%	%	%
	75	61	59	62	48
	64	59	49	40	42
	68	69	55	55	39
	69	64	60	41	39
	52	54	50	57	46
	50	53	53	45	44
	38	45	40	48	38
	48	44	37	48	45

Ownership of services in the home x demographics (2019)

Base: All adults 15+: 2838

Total

%

- ANY Broadband

80

Paid for TV service (e.g. Virgin Media, Sky TV, Eir Tv, Vodafone TV) (excludes free TV services – e.g. Saorview and online TV content service – e.g. Netflix, Amazon...

70

Home Broadband service (through your home phone line, fibre line, cable TV)

65

Home phone or landline telephone

52

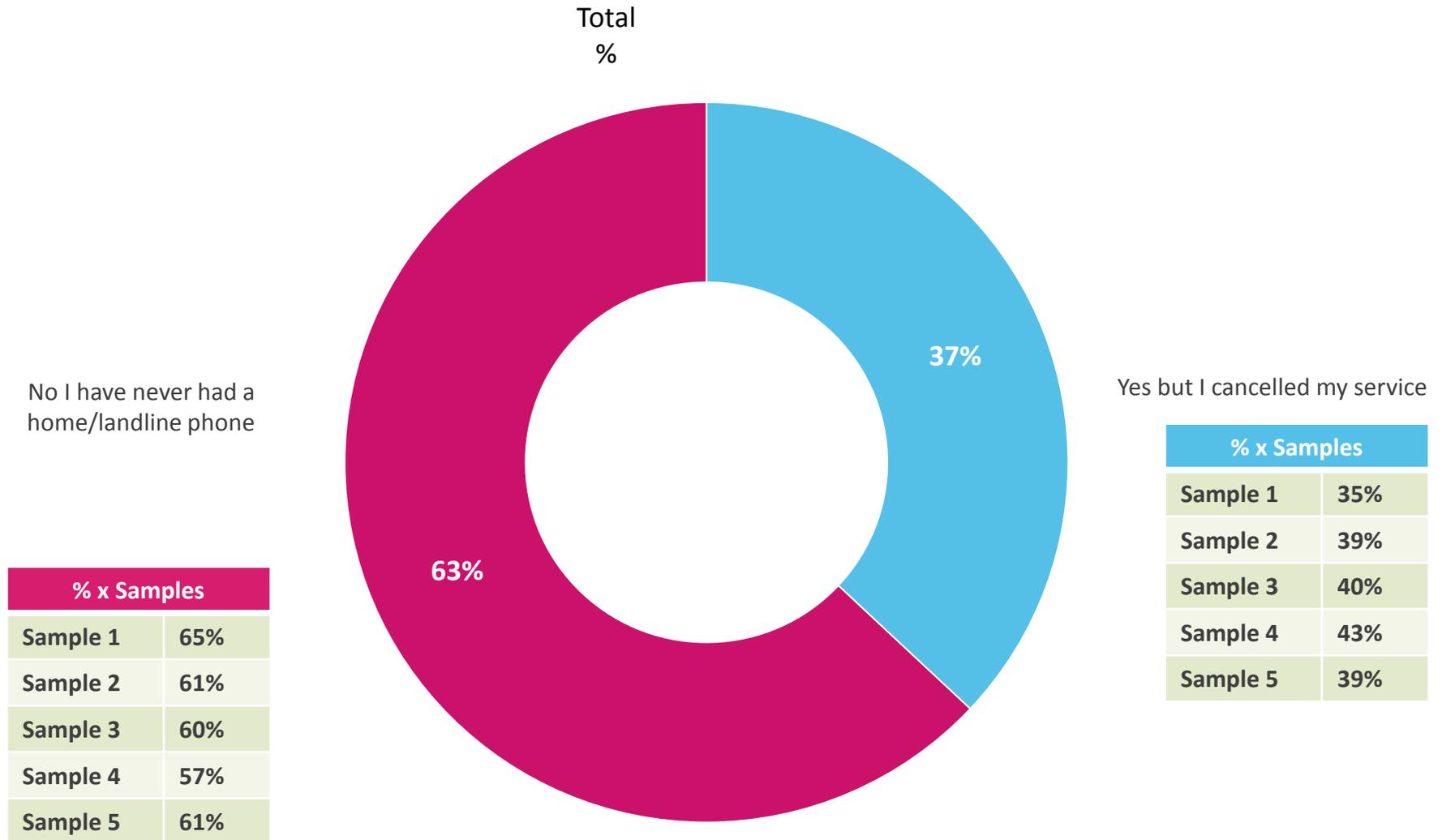
Other broadband service (e.g. Mobile Broadband, Satellite Broadband or Fixed Wireless Broadband)

40

Age					Social Class	
18-24	25-34	35-49	50-64	65+	ABC1 F50+	C2DE F50-
238	388	864	722	626	1106	1732
%	%	%	%	%	%	%
86	82	86	81	61	87	75
81	72	72	67	62	74	67
64	65	70	67	53	72	60
38	31	49	63	76	55	50
55	40	42	41	26	41	40

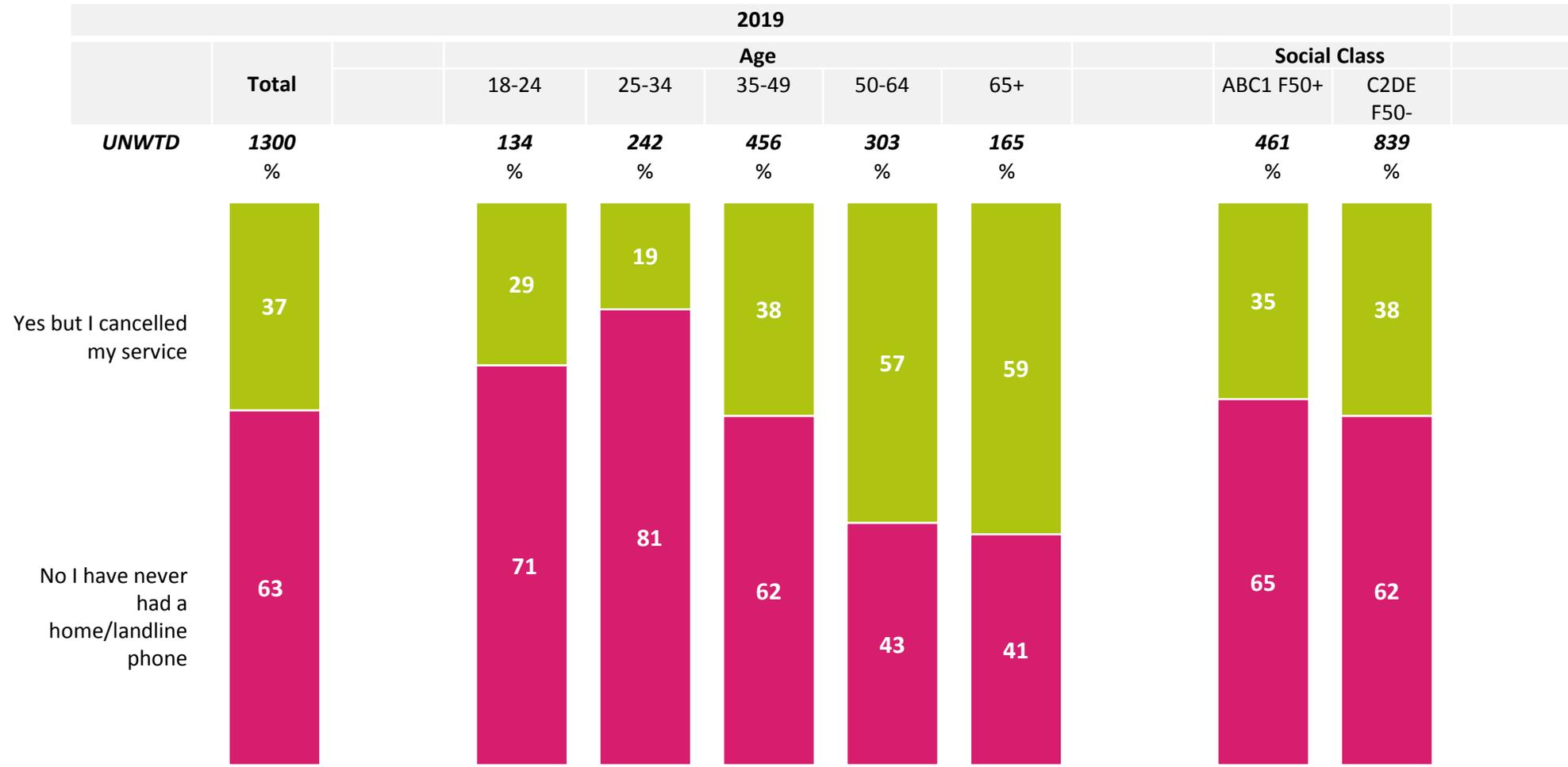
Incidence of ever having a home/landline phone

Base: All with no landline n=1,300



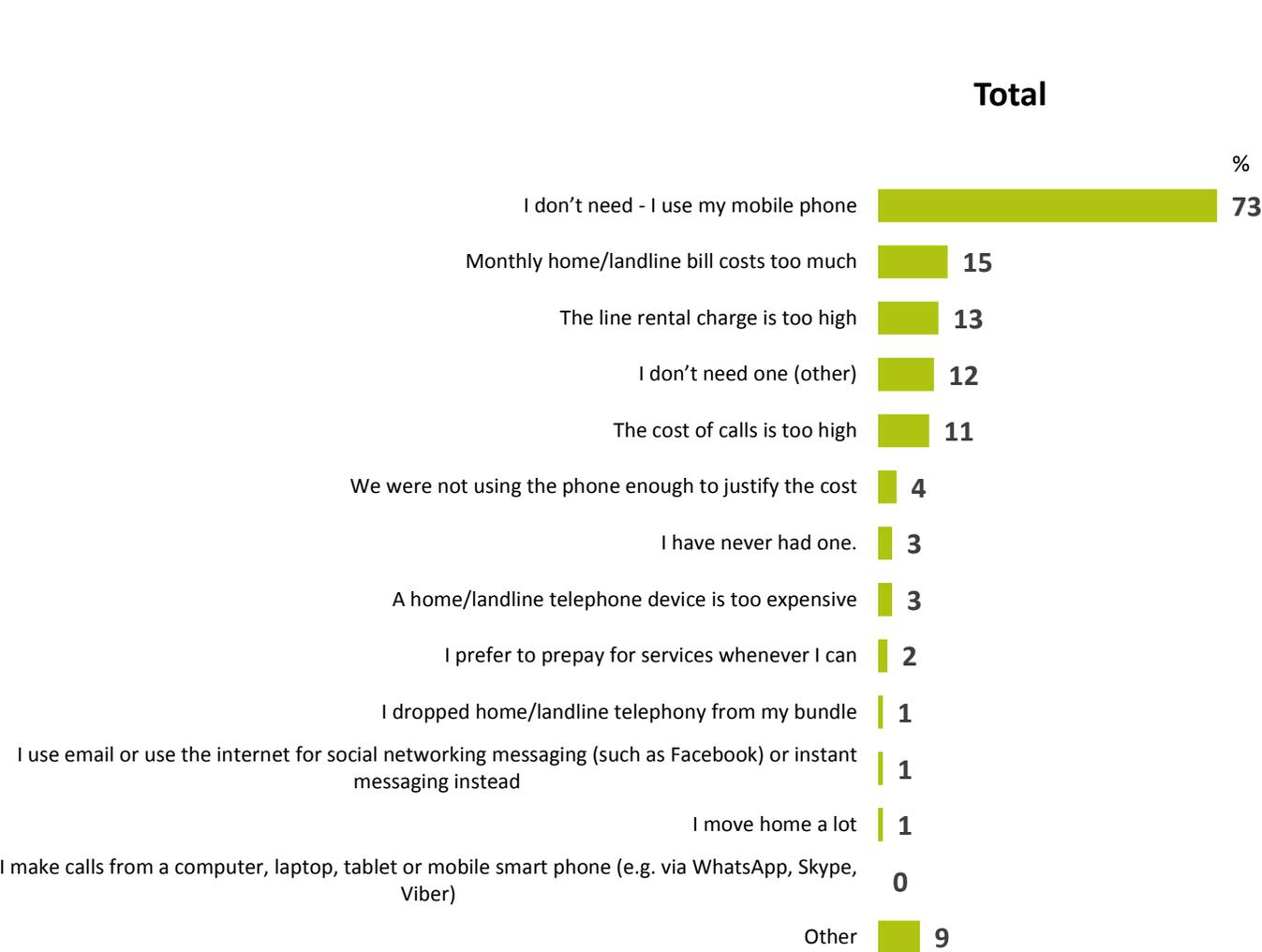
Incidence of ever having a home/landline phone x demographics (2019)

Base: All with no landline n=1,300



Rationale for cancelling home/landline phone

Base: All who cancelled home/landline service n=517



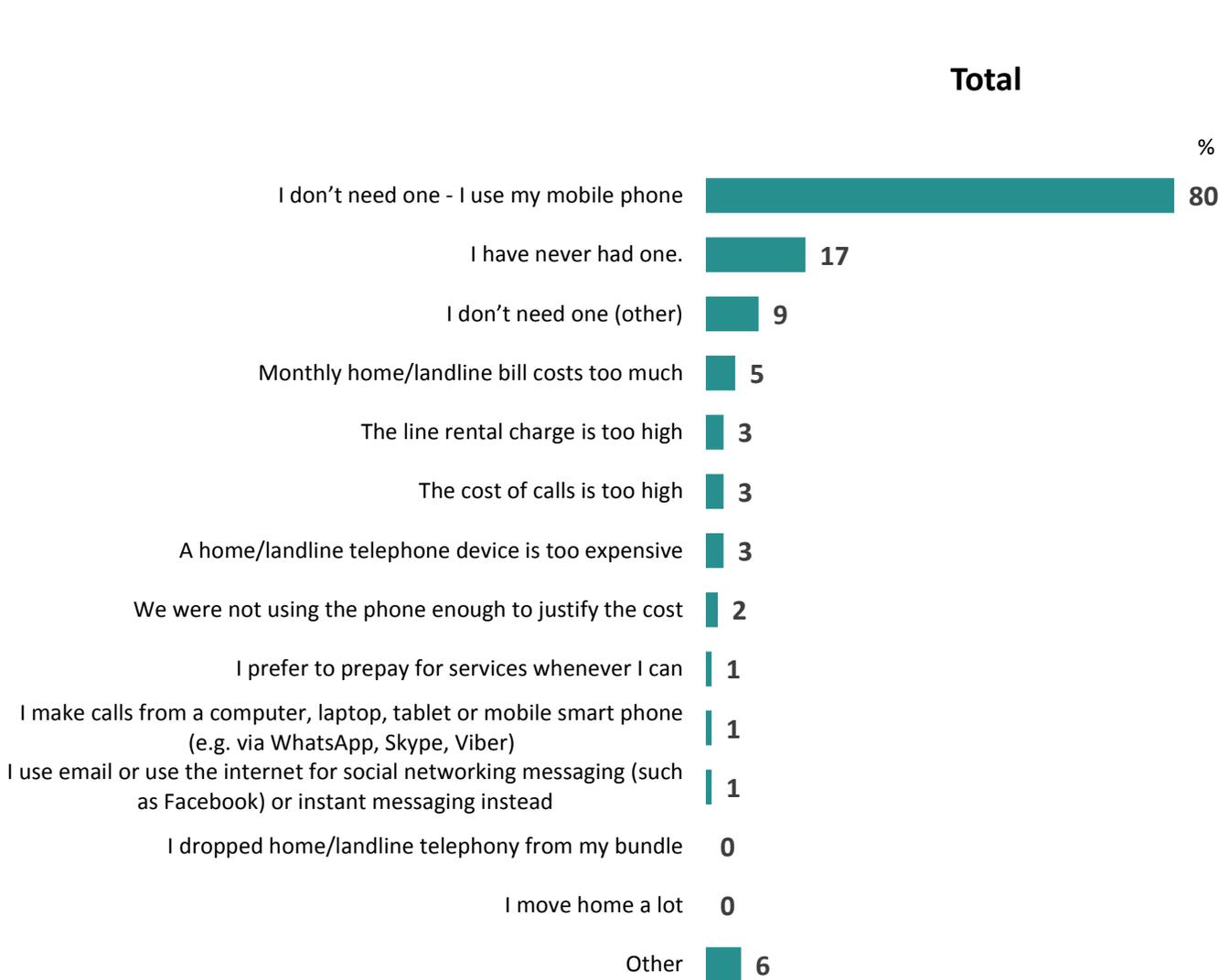
	Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
	82	91	119	121	104
%	%	%	%	%	%
	71	79	72	80	69
	13	19	17	24	13
	12	22	9	21	17
	12	9	5	23	16
	10	17	8	9	20
	1	7	12	12	5
	3	2	1	11	2
	1	5	5	6	6
	2	6	1	1	3
	1	1	1	1	1
	1	1	1	3	1
	1	-	2	-	1
	11	5	4	7	7

***Question added 2019



Rationale for never having a home/landline phone

Base: All who never had home/landline service n=783

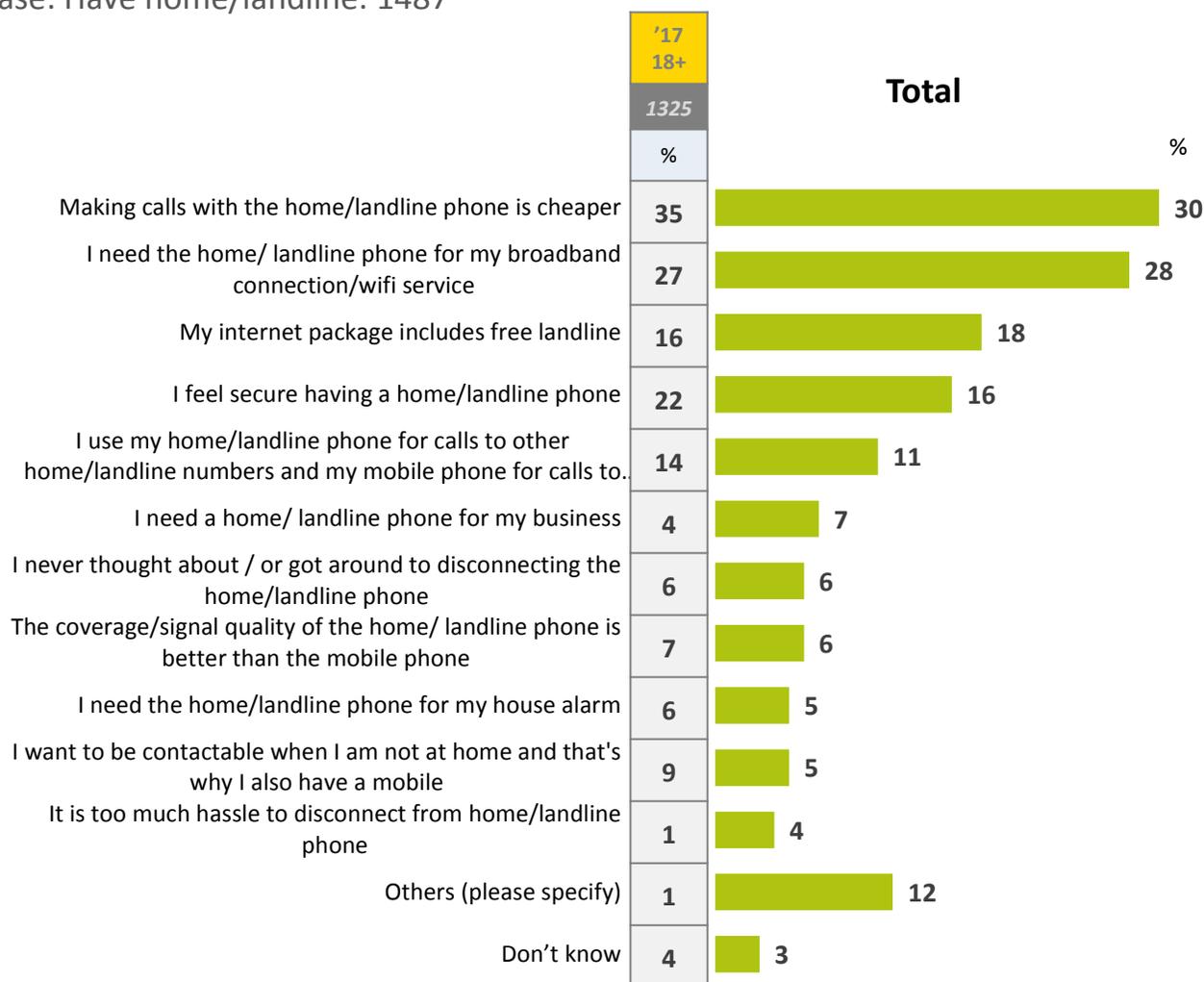


	Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
Total	151	138	171	166	157
%	%	%	%	%	%
I don't need one - I use my mobile phone	79	81	86	78	84
I have never had one.	15	24	20	20	16
I don't need one (other)	9	12	8	9	6
Monthly home/landline bill costs too much	4	7	3	6	9
The line rental charge is too high	2	8	6	8	8
The cost of calls is too high	1	5	4	8	10
A home/landline telephone device is too expensive	2	3	5	2	2
We were not using the phone enough to justify the cost	2	4	4	1	1
I prefer to prepay for services whenever I can	1	2	4	2	4
I make calls from a computer, laptop, tablet or mobile smart phone (e.g. via WhatsApp, Skype, Viber)	-	1	3	1	2
I use email or use the internet for social networking messaging (such as Facebook) or instant messaging instead	1	-	2	0	-
I dropped home/landline telephony from my bundle	1	-	-	-	0
I move home a lot	-	-	1	2	1
Other	8	5	3	2	1

***Question added 2019

Rationale for having both a home/landline phone and a mobile phone

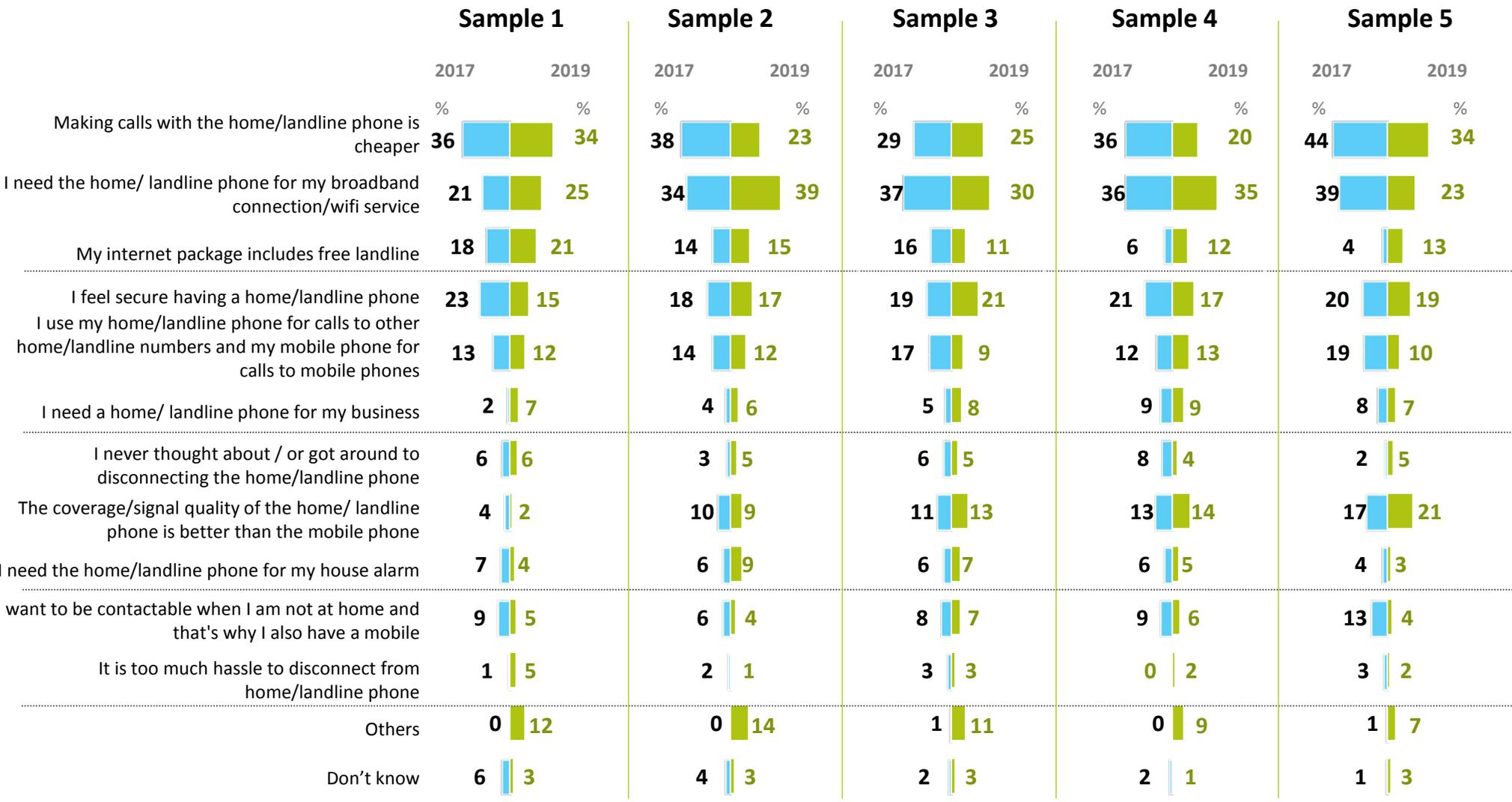
Base: Have home/landline: 1487



Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
264	278	305	413	227
%	%	%	%	%
34	23	25	20	34
25	39	30	35	23
21	15	11	12	13
15	17	21	17	19
12	12	9	13	10
7	6	8	9	7
6	5	5	4	5
2	9	13	14	21
4	9	7	5	3
5	4	7	6	4
5	1	3	2	2
12	14	11	9	7
3	3	3	1	3

Rationale for having both a home/landline phone and a mobile phone 2017 vs 2019

Base: Have home/landline: 18+ 1487



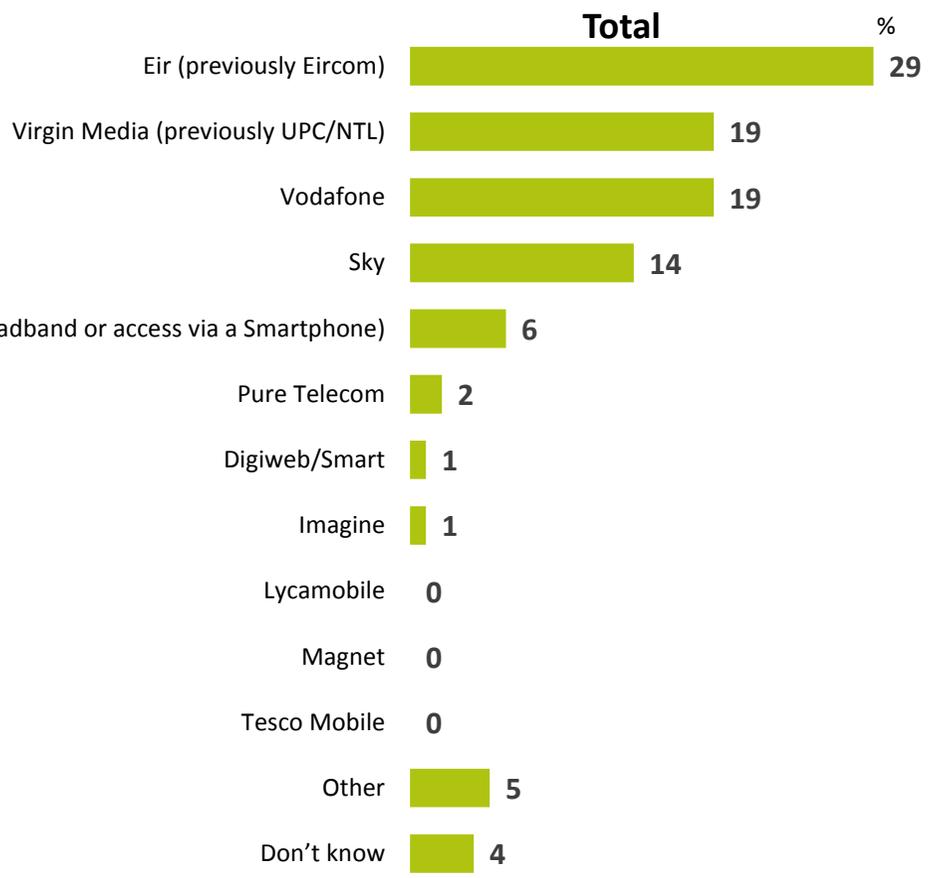
Rationale for having both a home/landline phone and a mobile phone (2019)

Base: have home/landline: 1487

	Total	Age					Social Class	
		18-24	25-34	35-49	50-64	65+	ABC1 F50+	C2DE F50-
UNWTD	1487	104	145	408	412	418	639	848
	%	%	%	%	%	%	%	%
Making calls with the home/landline phone is cheaper	30	28	35	23	33	34	31	29
I need the home/ landline phone for my broadband connection/Wi-Fi service	28	21	31	31	33	20	30	26
My internet package includes free landline	18	29	19	23	16	11	21	16
I feel secure having a home/landline phone	16	7	11	14	15	26	15	17
I use my home/landline phone for calls to other home/landline numbers and my mobile phone for calls to mobile phones	11	7	10	11	14	12	15	9
I need a home/ landline phone for my business	7	12	12	8	7	4	9	6
I never thought about / or got around to disconnecting the home/landline phone	6	11	2	3	7	7	6	5
The coverage/signal quality of the home/ landline phone is better than the mobile phone	6	2	4	6	6	8	4	7
I need the home/landline phone for my house alarm	5	1	7	4	7	6	5	6
I want to be contactable when I am not at home and that's why I also have a mobile	5	8	5	5	4	7	6	5
It is too much hassle to disconnect from home/landline phone	4	4	0	4	3	7	3	4
Others	12	5	12	8	11	19	12	11
Don't know	3	21	1	2	1	1	3	2

Home broadband service provider x samples

Base: All have broadband: 2210



Sample				
Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
418	436	465	564	327
%	%	%	%	%
25	43	36	37	38
28	2	0	0	0
18	24	20	19	13
15	16	11	6	8
5	5	8	15	14
2	1	3	1	0
1	2	1	0	-
1	1	2	2	2
0	0	-	-	-
-	-	0	0	-
0	1	0	2	0
2	4	14	12	20
4	2	5	6	4

Home Broadband service provider x demographics (2019)

Base: Have broadband: 2210

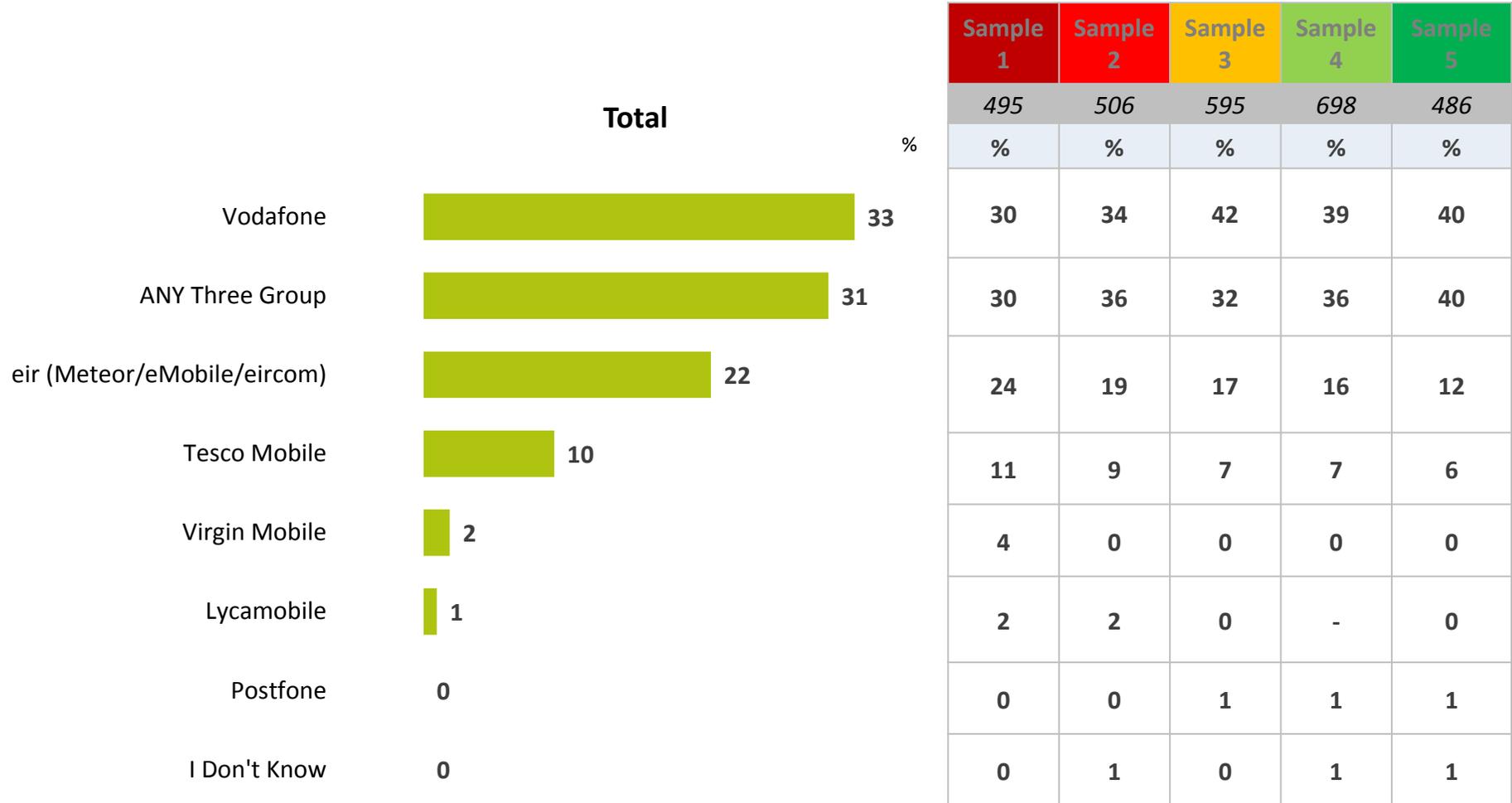
	Total	Age					Social Class	
		18-24	25-34	35-49	50-64	65+	ABC1 F50-	C2DE F50+
UNWTD	2210	211	340	754	572	333	961	1249
	%	%	%	%	%	%	%	%
Eir (previously Eircom)	29	24	21	28	38	36	27	31
Virgin Media (previously UPC/NTL)	19	24	21	18	17	16	22	16
Vodafone	15	17	13	18	11	13	13	16
Sky	14	14	18	14	9	15	13	14
Three (previously O2) (for Mobile Broadband or access via a Smartphone)	6	5	11	5	7	3	7	6
Vodafone at Home (for fixed broadband or fibre broadband)	4	3	5	4	3	4	4	4
Pure Telecom	2	-	1	2	2	2	1	2
Digiweb/Smart	1	1	0	2	0	0	1	1
Imagine	1	4	1	1	2	0	2	1
Lycamobile	0	2	-	-	0	-	1	0
Magnet	0	-	0	-	0	-	0	0
Tesco Mobile	0	0	0	1	0	-	0	1
Other (please specify)	5	3	5	4	6	5	5	4
Don't know	4	3	5	2	5	6	3	5



Mobile phone network provider and usage

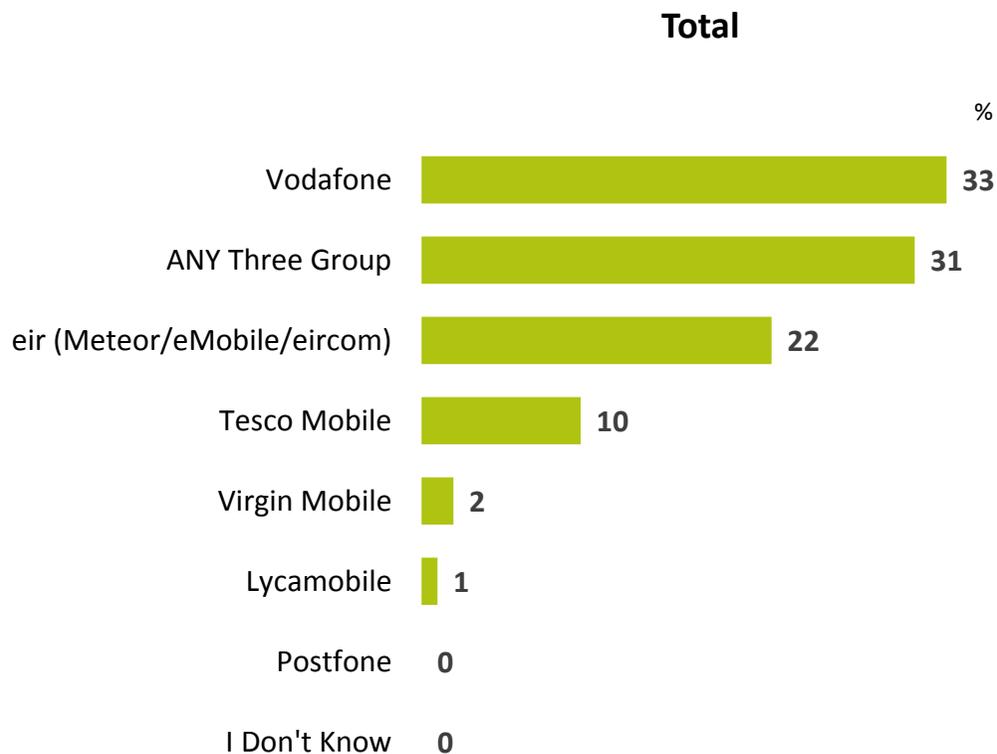
Current mobile phone network provider x Samples

Base: Have mobile: 2780



Current mobile phone network provider x demographics (2019)

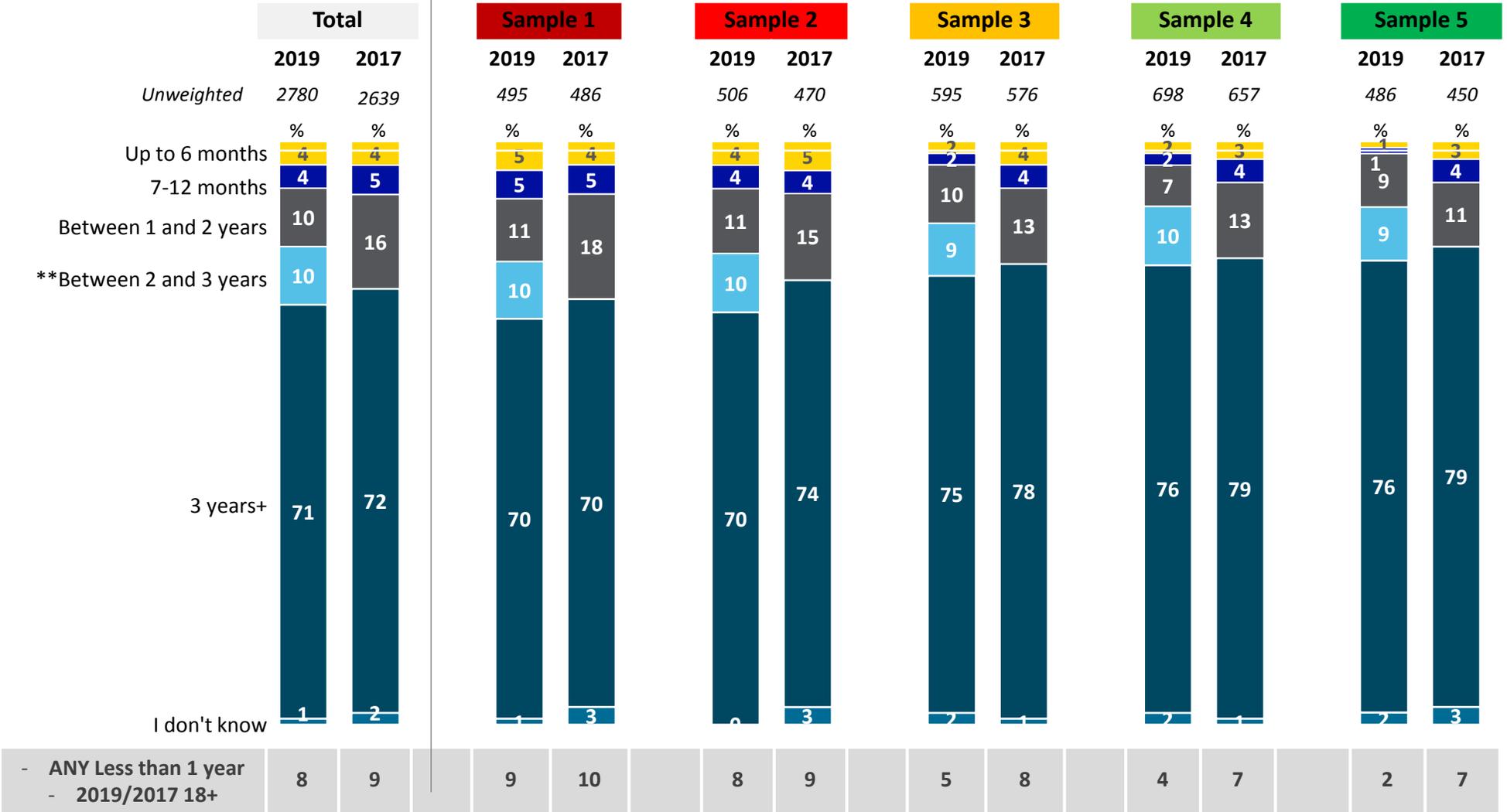
Base: All have mobile: 2780



Age					Social Class	
18-24	25-34	35-49	50-64	65+	ABC1 F50-	C2DE F50+
236	387	864	712	581	1099	1681
%	%	%	%	%	%	%
23	27	29	38	46	33	33
45	35	28	32	24	33	30
17	25	24	18	20	20	22
9	10	14	7	7	9	10
-	2	4	3	1	3	2
5	1	1	1	-	1	1
-	0	0	1	1	0	1
-	0	0	0	2	0	0

Length with current mobile phone provider x Samples

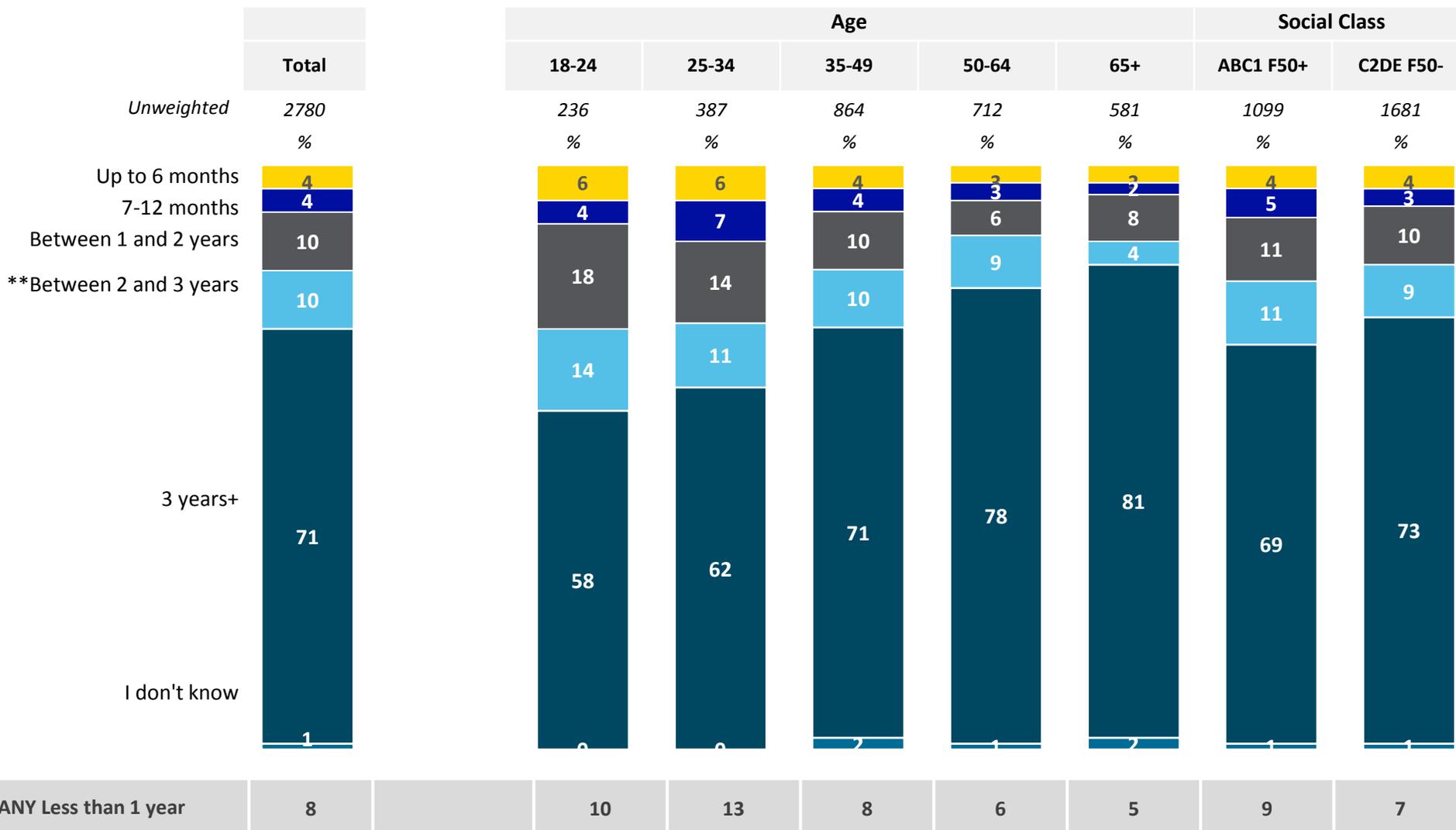
Base: All have mobile: 2,780



**Note question wording change

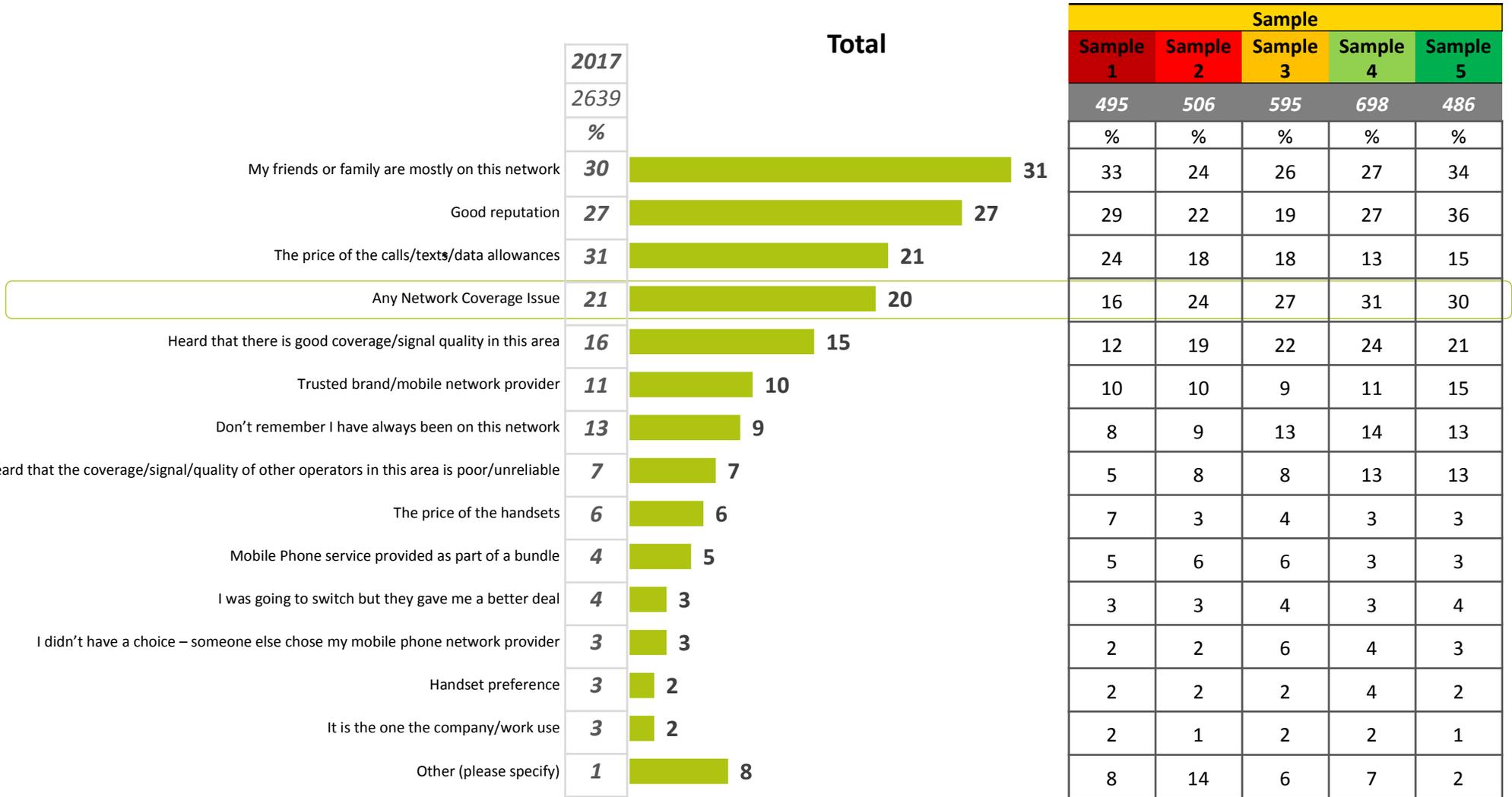
Length with current mobile phone provider x demographics (2019)

Base: All have mobile: 2780



Rationale for choosing current provider X samples

Base: All have mobile: 2780



Rationale for choosing current provider x samples (2019 vs. 2017)

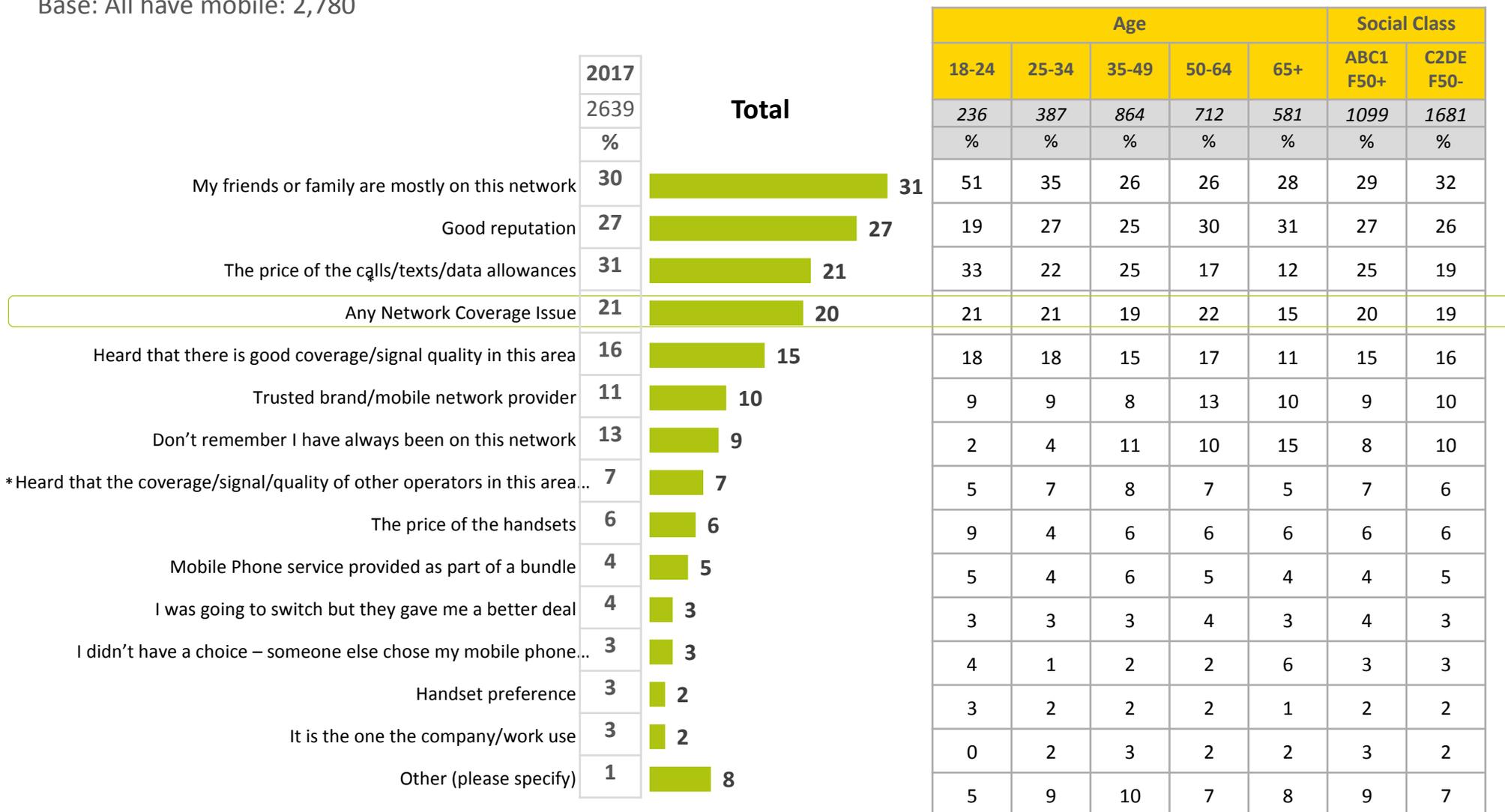
Base: All have mobile: 2780

Total 2017 %	Total 2019 %		Sample 1		Sample 2		Sample 3		Sample 4		Sample 5	
			2017 %	2019 %	2017 %	2019 %	2017 %	2019 %	2017 %	2019 %	2017 %	2019 %
30	31	My friends or family are mostly on this network	28	33	30	24	33	26	34	27	35	34
27	27	Good reputation	29	29	26	22	22	19	24	27	29	36
31	21	The price of the calls/texts/data allowances	35	24	28	18	21	18	21	13	13	15
21	20	Any Network Coverage Issues	18	16	18	24	32	27	32	31	35	30
16	15	* Heard that there is good coverage/signal quality in this area	12	12	16	19	25	22	24	24	26	21
11	10	Trusted brand/mobile network provider	11	10	13	10	8	9	11	11	18	15
13	9	Don't remember I have always been on this network	14	8	12	9	12	13	12	14	11	13
7	7	* Heard that the coverage/signal quality of other operators in this area is poor/unreliable	6	5	4	8	9	8	11	13	14	13
6	6	The price of the handsets	8	7	6	3	2	4	4	3	6	3
4	5	Mobile Phone service provided as part of a bundle	5	5	6	6	1	6	3	3	3	3
3	3	I didn't have a choice – someone else chose my mobile phone network provider	2	2	3	2	3	6	3	4	5	3
4	3	I was going to switch but they gave me a better deal	4	3	5	3	3	4	2	3	3	4
3	2	Handset preference	3	2	1	2	2	2	3	4	4	2
3	2	It is the one the company/work use	3	2	5	1	2	2	3	2	1	1
1	8	Other	0	0	1	4	1	0	1	0	0	2



Rationale for choosing current provider x demographics (2019)

Base: All have mobile: 2,780



Rationale for choosing current provider X current providers 2017 vs 2019

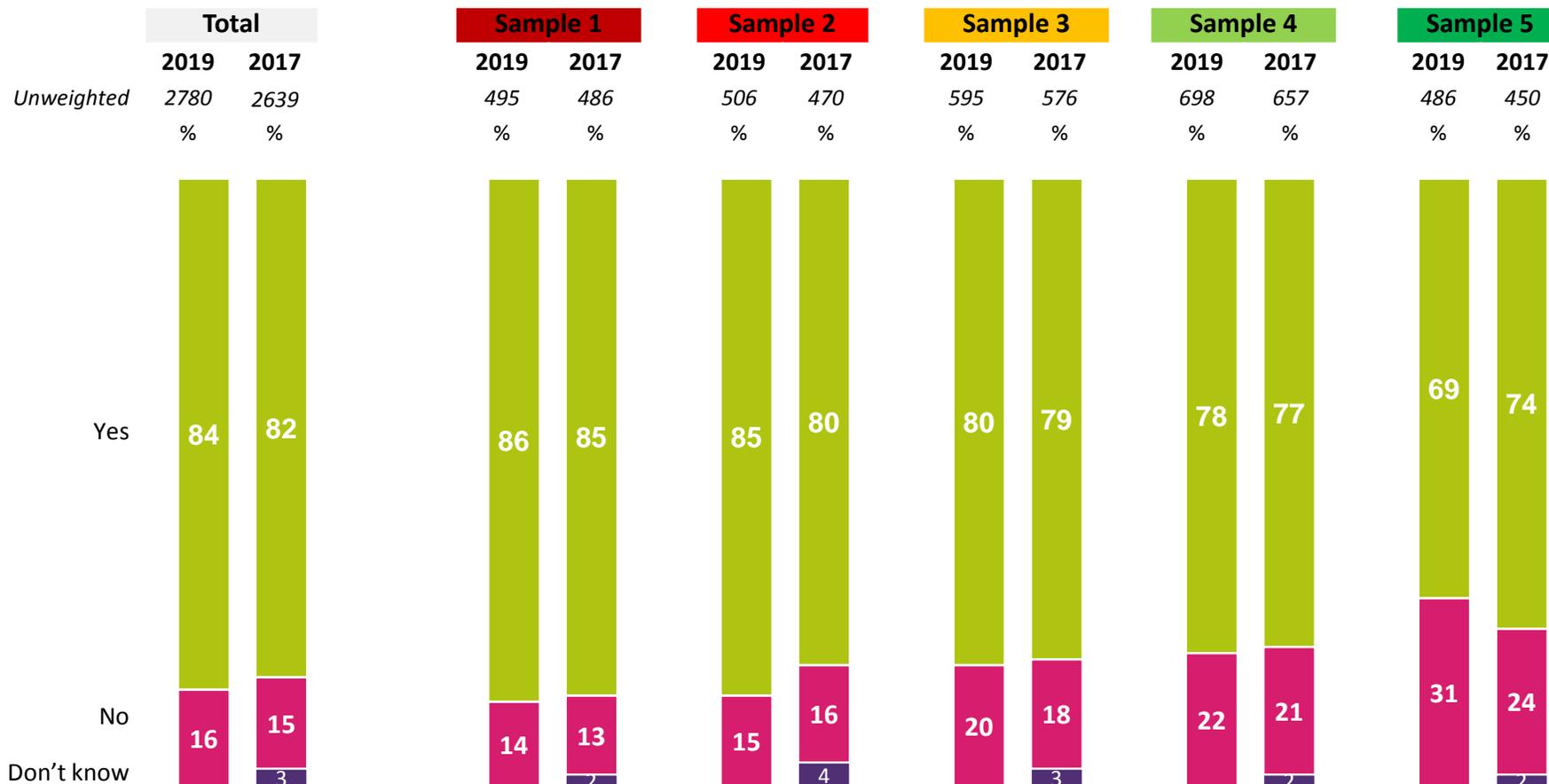
Base: All have mobile: 2,780

Total Total		Vodafone		Eir/Meteor/eMobile		Any Three Group		Tesco Mobile		Other	
2017	2019	2017	2019	2017	2019	2017	2019	2017	2019	2017	2019
%	%	%	%	%	%	%	%	%	%	%	%
30	31	34	31	24	29	31	32	18	21	23	51
My friends or family are mostly on this network											
27	27	36	31	22	26	23	23	18	23	12	30
Good reputation											
31	21	18	12	36	22	31	20	64	52	66	28
The price of the calls/texts/data allowances											
21	20	26	24	14	17	22	21	13	9	23	20
- ANY Network Coverage											
16	15	21	18	11	13	15	17	5	8	20	14
* Heard that there is good coverage/signal quality in this area											
11	10	15	10	12	10	8	9	4	6	6	14
Trusted brand/mobile network provider											
13	9	17	12	11	9	13	9	3	2	7	3
Don't remember I have always been on this network											
7	7	7	9	5	6	8	5	8	2	4	12
* Heard that the coverage/signal/quality of other operators in this area is poor/unreliable											
6	6	5	5	9	6	5	6	13	7	10	13
The price of the handsets											
4	5	3	2	10	8	3	4	3	4	3	13
Mobile Phone service provided as part of a bundle											
3	3	3	3	1	4	2	1	0	1	11	5
I didn't have a choice – someone else chose my mobile phone network provider											
4	3	4	2	4	4	4	3	4	5	1	3
I was going to switch but they gave me a better deal											
3	2	3	2	1	1	4	1	2	3	0	8
Handset preference											
3	2	3	3	1	1	4	3	2	1	0	2
It is the one the company/work use											
1	8	1		0		0		0	6	0	13
Other (please specify)											



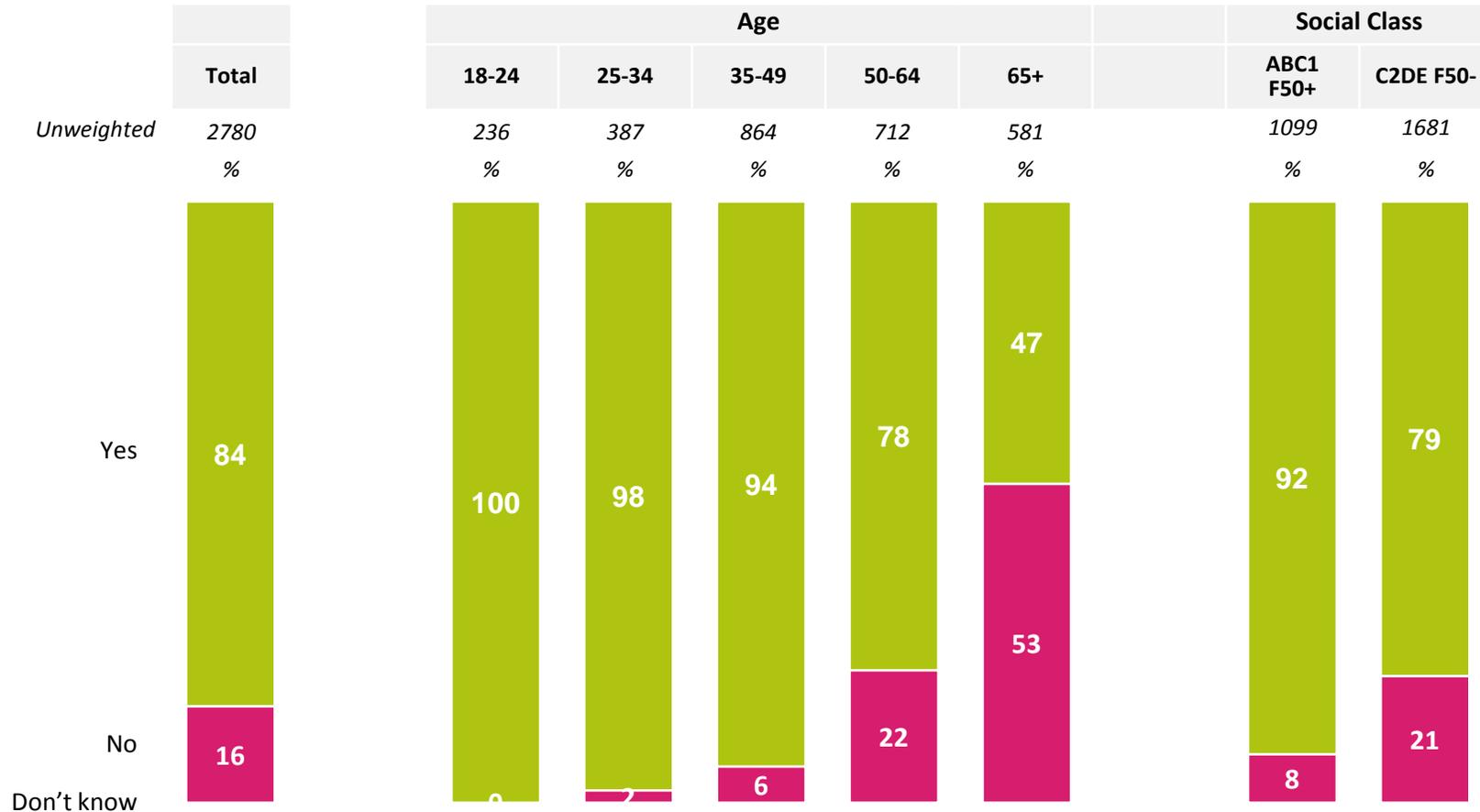
Ownership of smartphone vs non smartphone

Base: All have mobile: 2,780



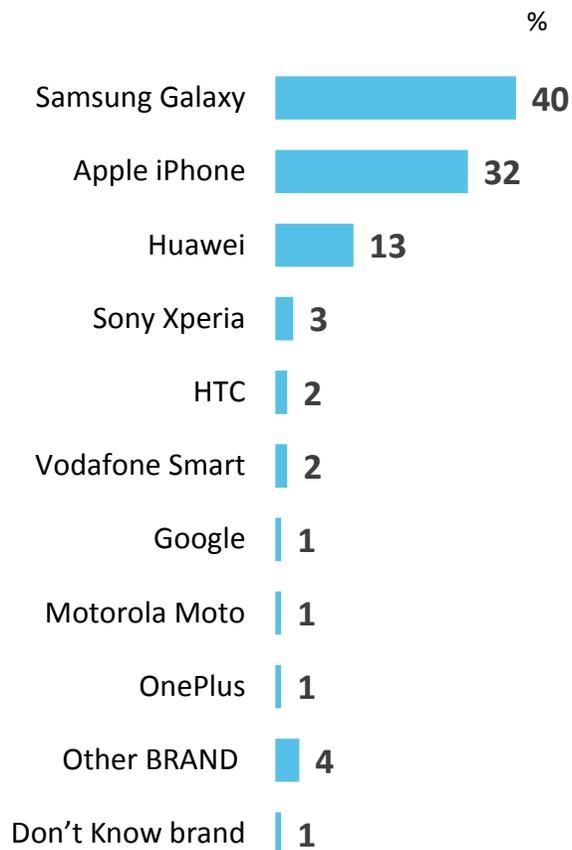
Ownership of smartphone vs non smartphone x demographics (2019)

Base: All have mobile: 2,780



Ownership of mobile phone handsets x demographics

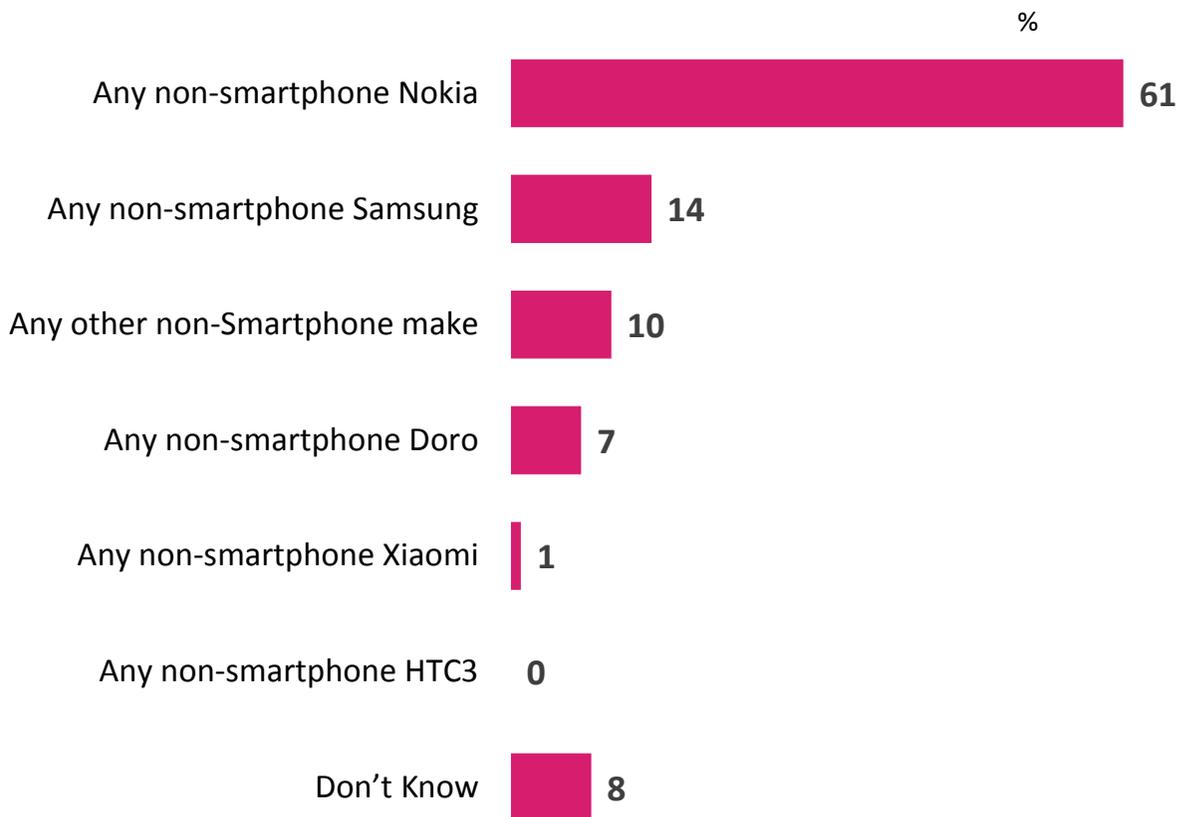
Base: All have smartphone 2220



	Age					Social Class	
	18-24	25-34	35-49	50-64	65+	ABC1 F50+	C2DE F50-
	234	380	809	546	251	966	1254
	%	%	%	%	%	%	%
Samsung Galaxy	29	48	38	41	41	40	40
Apple iPhone	45	33	30	26	30	35	29
Huawei	11	9	17	11	13	12	13
Sony Xperia	4	3	3	4	1	3	4
HTC	-	2	2	1	3	1	2
Vodafone Smart	2	1	2	2	0	1	2
Google	2	1	1	0	-	0	1
Motorola Moto	2	0	1	1	2	1	1
OnePlus	2	2	1	1	-	1	1
Other BRAND	2	1	4	7	4	3	4
Don't Know brand	0	0	1	3	3	0	2

Non-smartphone type x samples

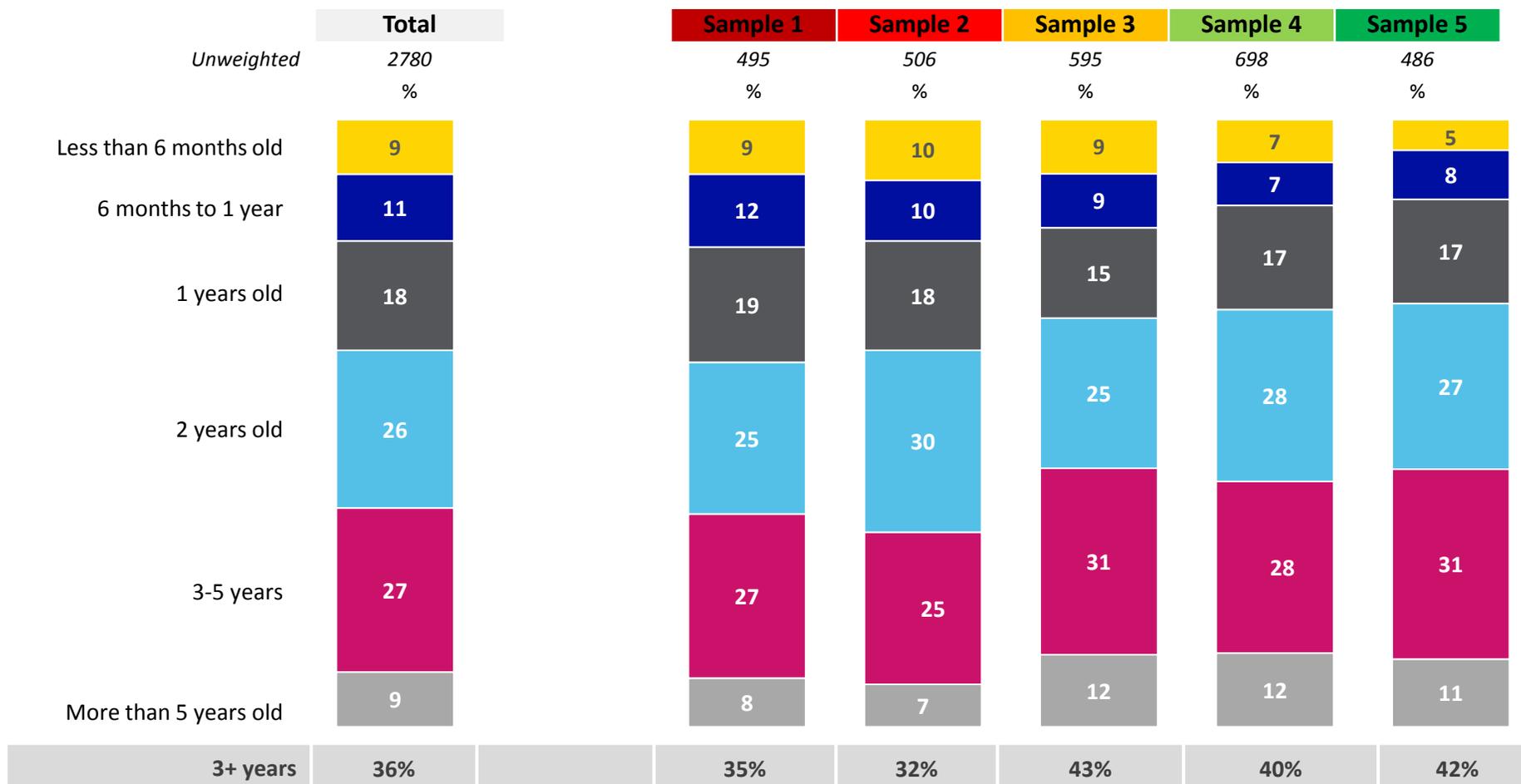
Base: Don't have smartphone 560



	Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
	69	68	121	154	148
	%	%	%	%	%
Any non-smartphone Nokia	67	51	53	52	54
Any non-smartphone Samsung	15	8	15	12	10
Any other non-Smartphone make	7	13	20	9	8
Any non-smartphone Doro	2	14	9	16	15
Any non-smartphone Xiaomi	1	1	-	-	-
Any non-smartphone HTC3	-	-	-	1	-
Don't Know	7	13	3	11	12

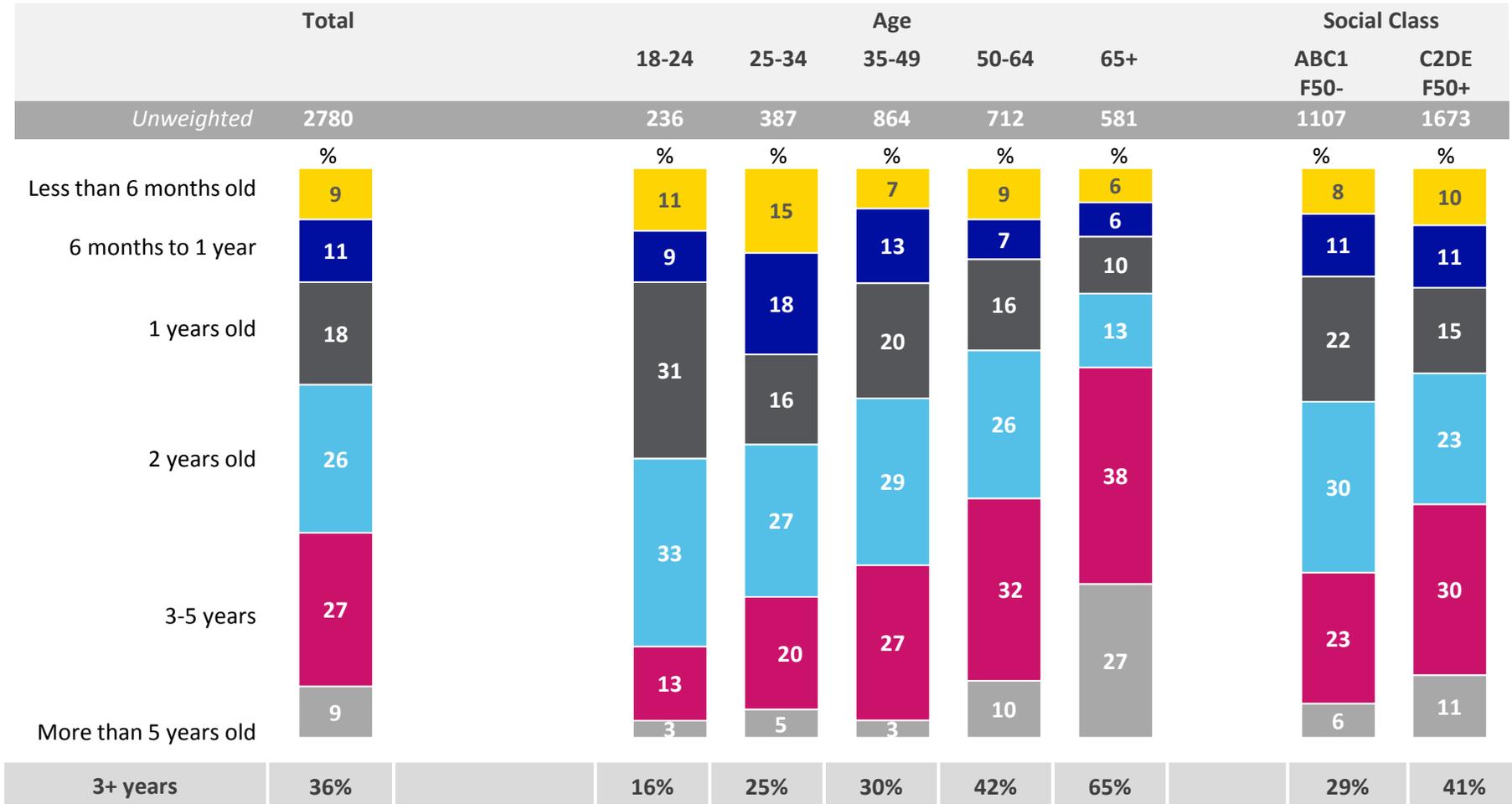
Age of current handset (from when it was purchased new) x Segments

Base: All have mobile :



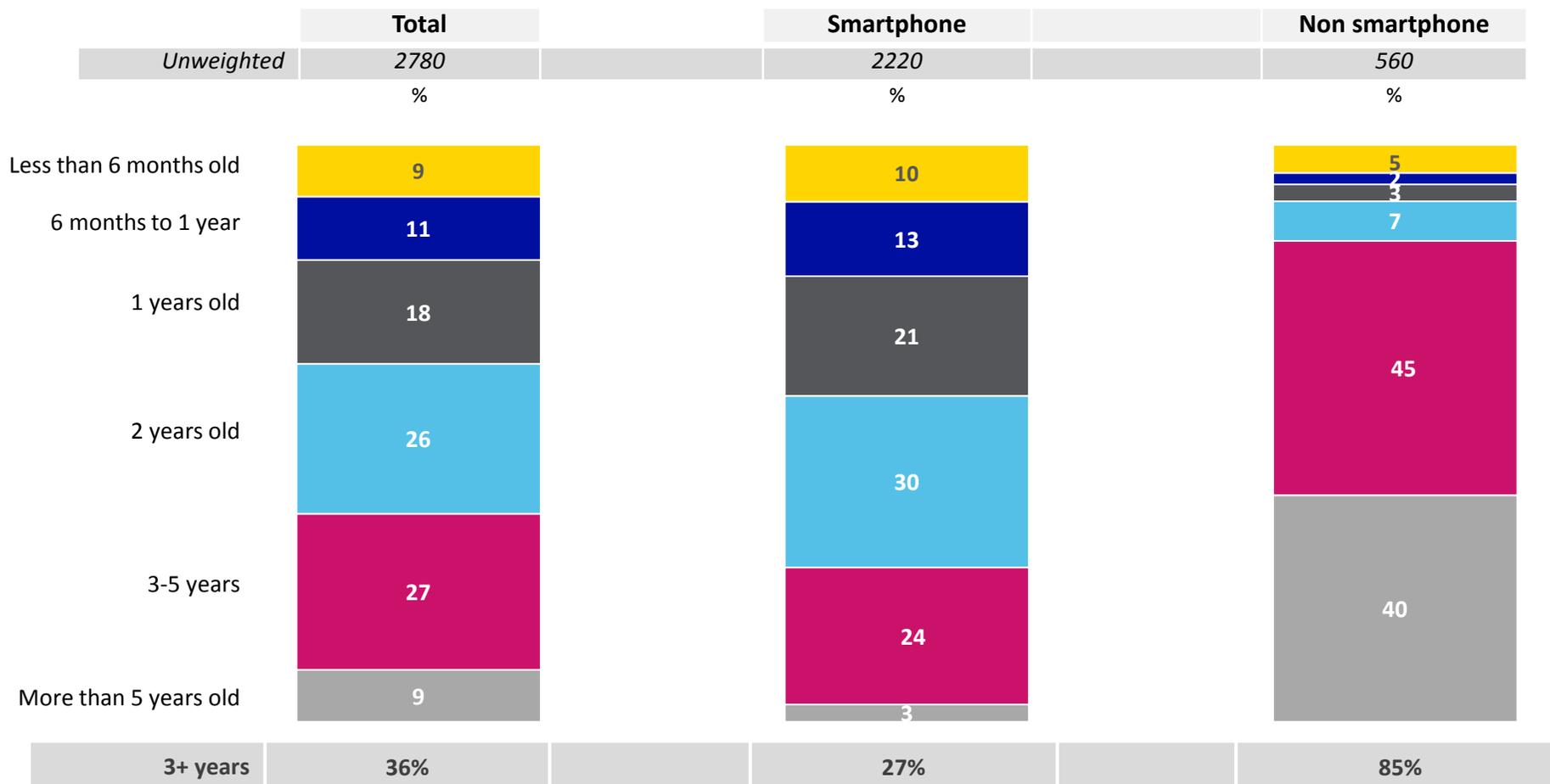
Age of current handset (from when it was purchased new) x demographics (2019)

Base: All have mobile :



Age of current handset (from when it was purchased new): Smartphone vs non smartphone

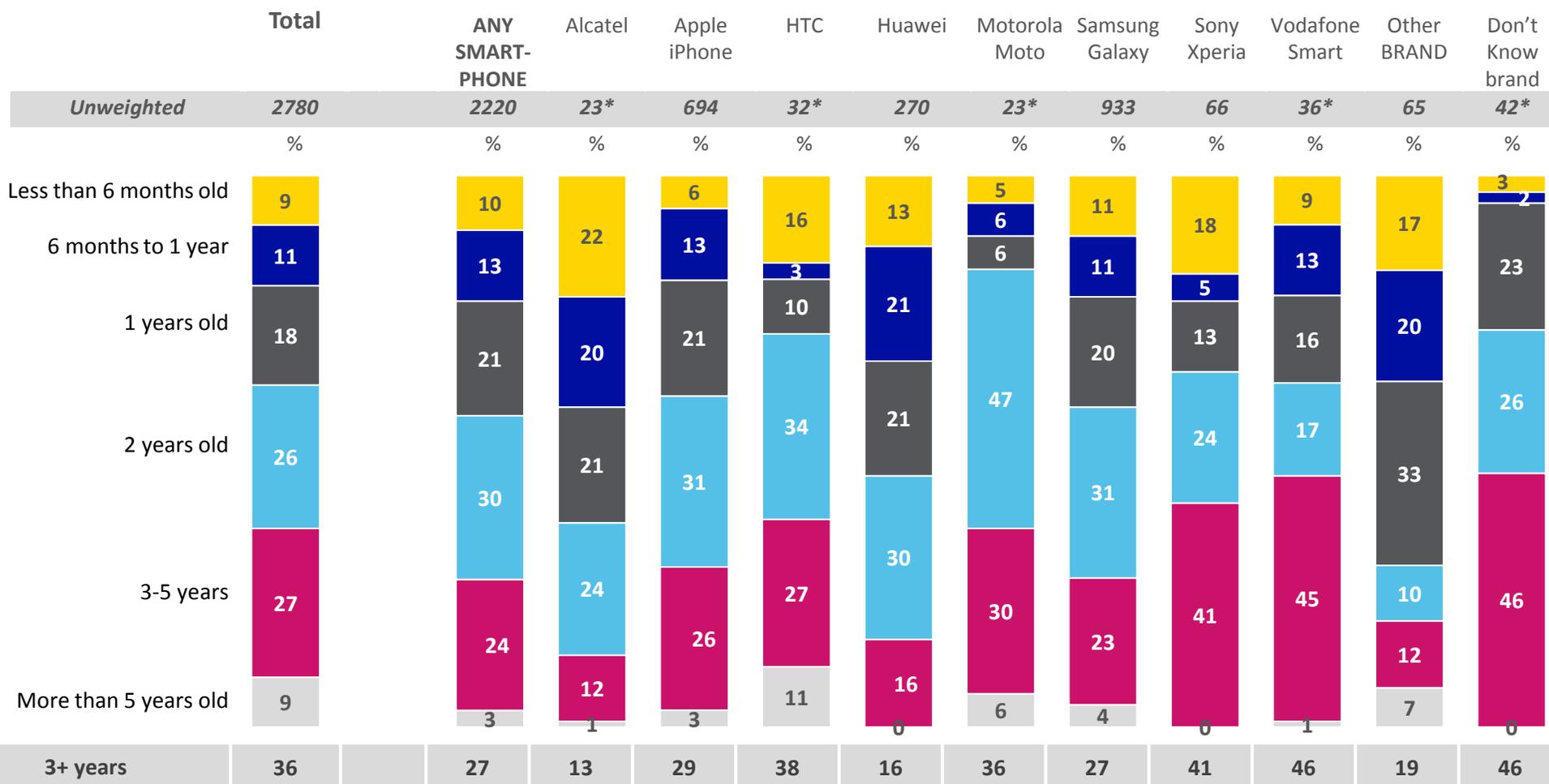
Base: All have mobile :



Age of current handset (from when it was purchased new) x mobile phone handset

Base: All have mobile : 2,780

Current Smartphone

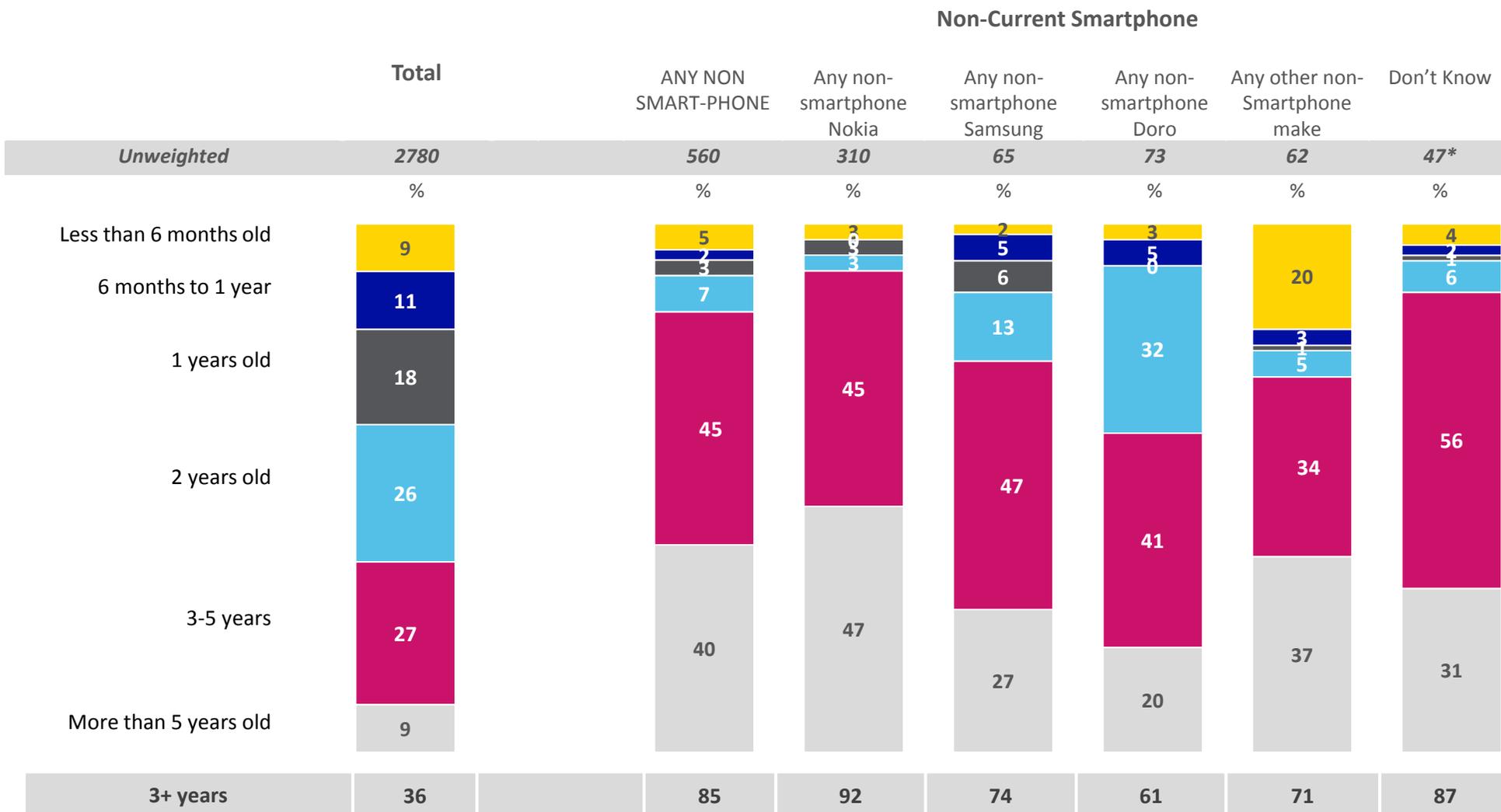


*Small base size



Age of current non-smart phone (from when it was purchased new) x mobile phone handset

Base: All have mobile : 2,780

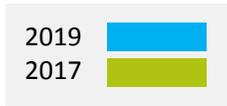


**Small base size*

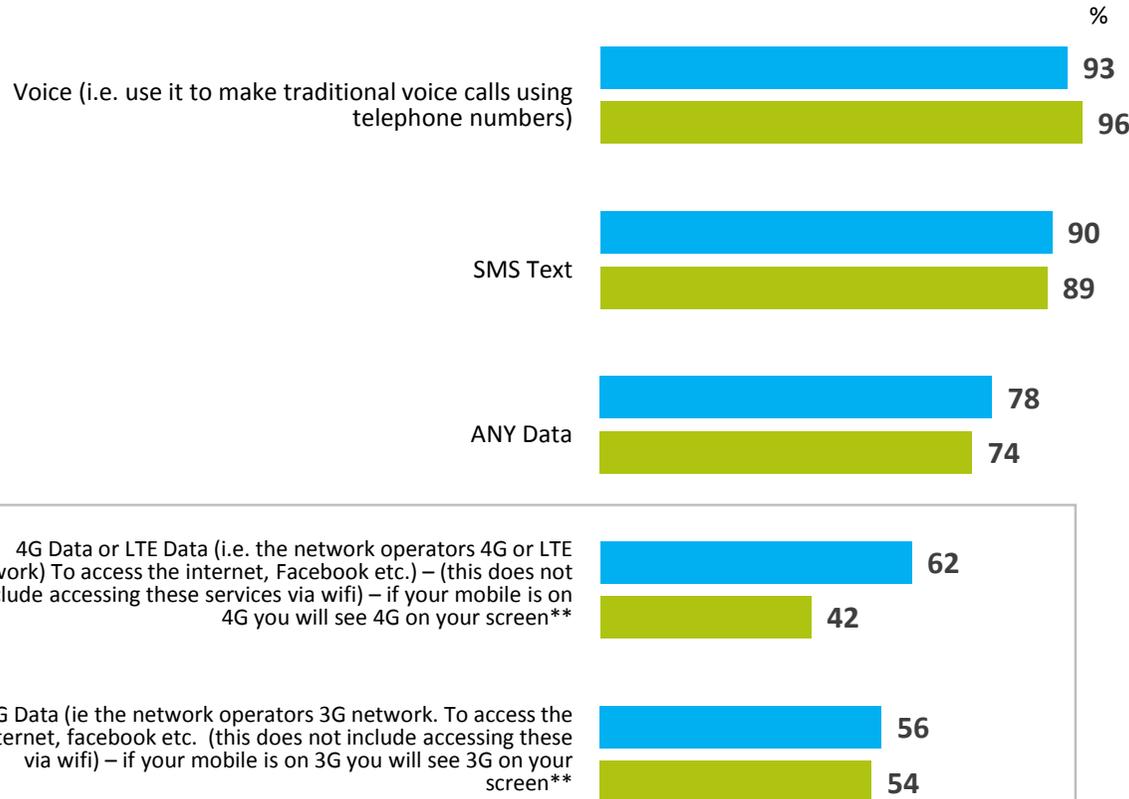


Incidence of using various services on mobile phone x Samples

Base: All have mobile: n=2,780



Total

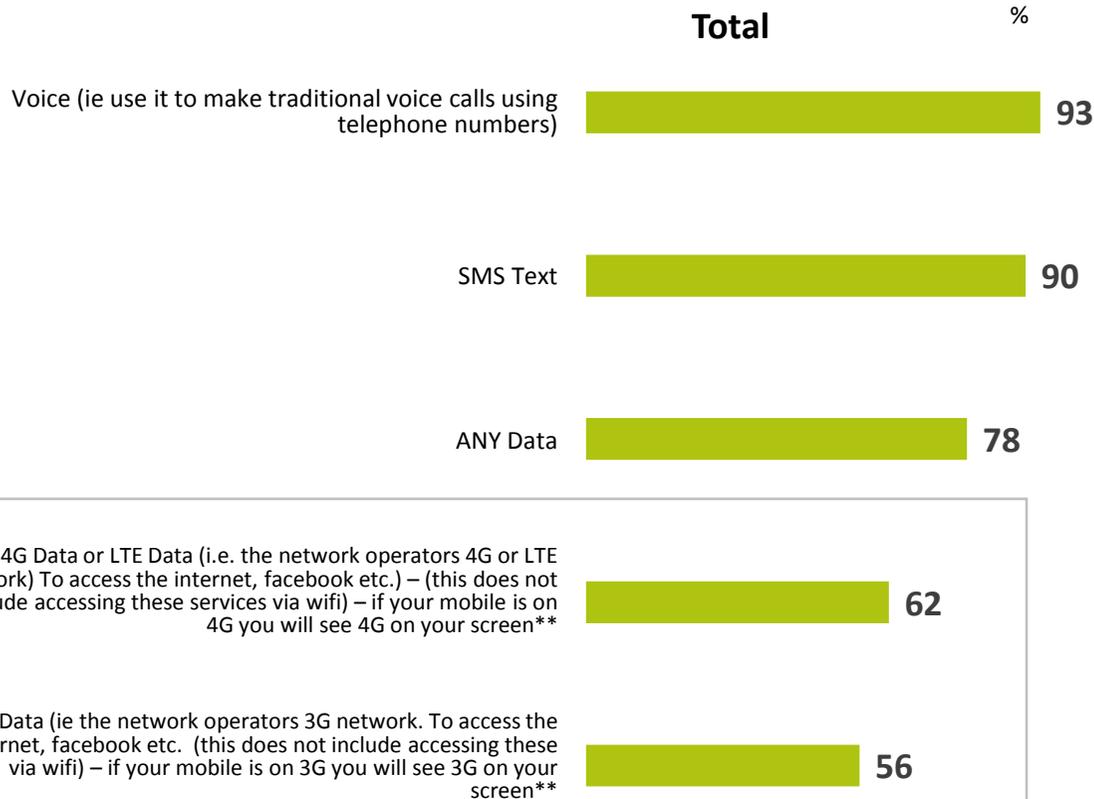


Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
495	506	595	698	486
%	%	%	%	%
91	94	98	98	92
96	94	96	97	96
90	90	89	88	85
90	87	91	88	87
79	80	76	73	60
77	70	71	66	65
65	65	61	49	38
47	39	33	29	27
54	64	60	60	51
55	54	53	51	51



Incidence of using various services on mobile phone x demographics (2019)

Base: All have mobile: 2780



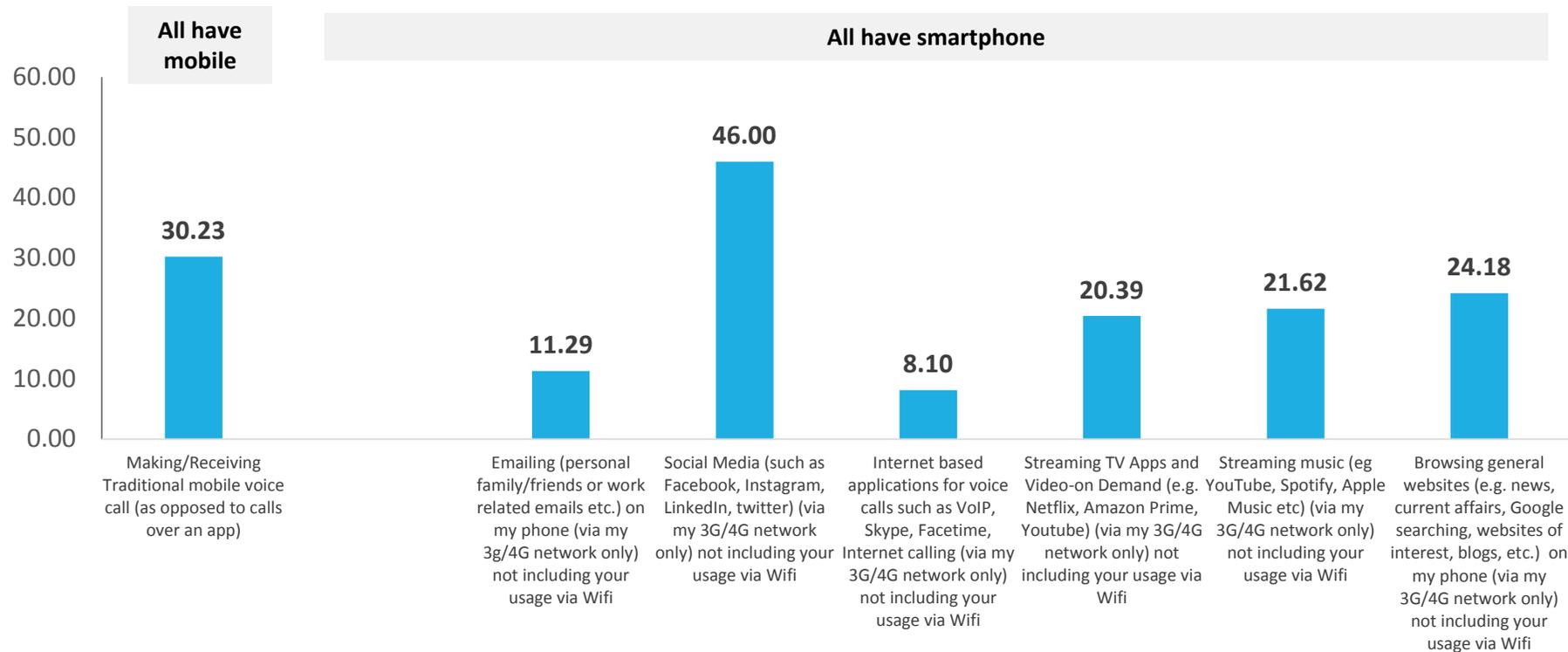
Age					Social Class	
18-24	25-34	35-49	50-64	65+	ABC1 F50-	C2DE F50+
236	387	864	712	581	1107	1673
%	%	%	%	%	%	%
90	90	93	95	95	93	93
97	95	93	90	72	93	87
96	95	87	69	43	85	73
80	79	71	53	30	71	56
74	69	59	50	32	57	55

The Under 50's and ABC1 claim significantly higher use of services.

Average mobile phone usage per day

Base: All have mobile/all have smartphone

Average No of Minutes Per Day



Mean 2019	30.23		11.29	46.00	8.10	20.39	21.62	24.18
Mean 2017	31.21		8.16	33.33	8.19	9.51	9.39	n/a
Median 2019	20.00		2.00	30.00	0.00	0.00	0.00	15.00
Median 2017	20.00		2.00	15.00	0.00	0.00	0.00	n/a
Standard deviation 2019	39.03		28.43	60.43	25.32	40.96	42.68	30.58
Standard deviation 2017	39.80		18.38	51.92	18.49	27.71	26.34	n/a

2017: Q14 Thinking about your usage of your mobile phone in a typical day, how much do you use your mobile phone service for the following? [multiple answers] *By mobile phone service we mean using your mobile phone's network to do the following, and excludes any use of Wifi networks. C-K TO BE ONLY ASKED OF THOSE WITH SMART PHONE AT Q.12

2019: Q15 Thinking about your usage of your mobile phone in a typical day, how much do you use your mobile phone service for the following? [multiple answers] CLARIFY: By mobile phone service we mean using your mobile phone's network to do the following, and excludes any use of Wifi networks. Only your usage on your phones 3G/4G data plan SHOW CARD

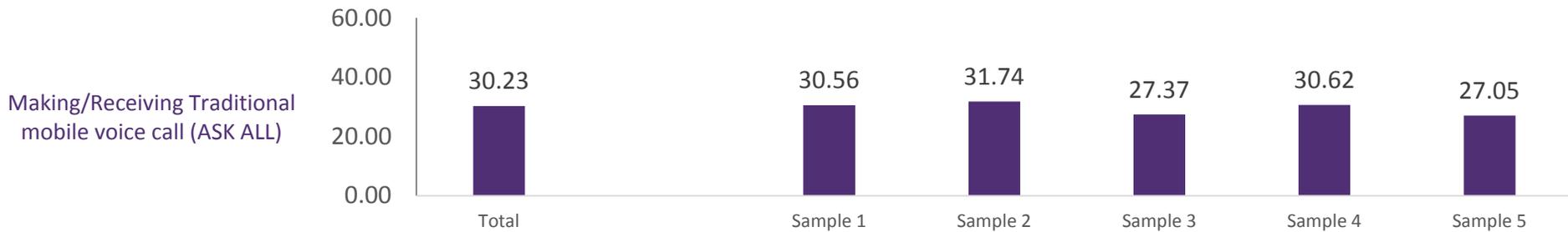


Average number of minutes per day for each x segments

Base: All have mobile phone:

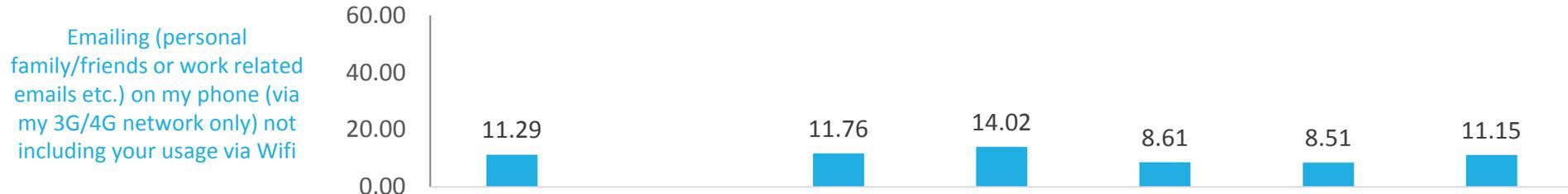
Average No of Minutes Per Day

Base: All have mobile	2780	495	506	595	698	486
-----------------------	------	-----	-----	-----	-----	-----



Mean 2017 18+	31.21	31.46	30.27	32.00	29.89	28.09
Standard Deviations	39.03	36.93	41.78	42.16	44.90	35.21

Base: All have smartphone	2220	426	438	474	544	338
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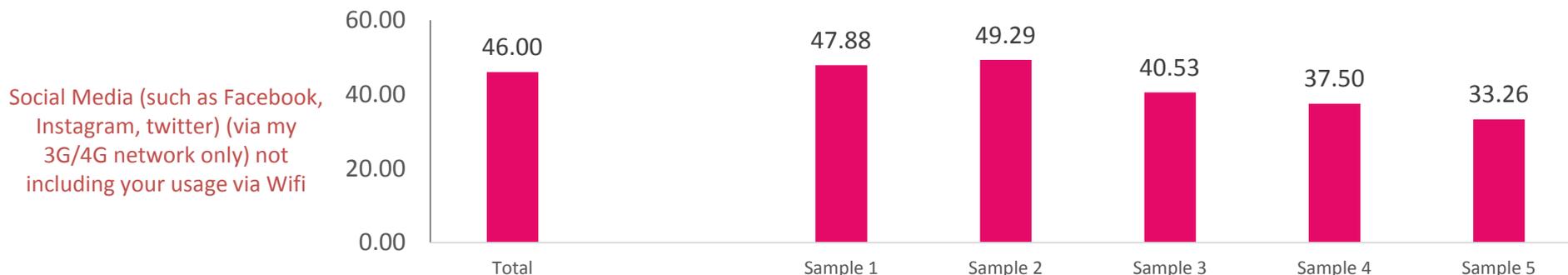
Mean 2017 18+	8.16	7.88	10.94	6.48	9.56	5.79
Standard deviation	28.43	29.20	34.14	25.09	17.34	26.77

Average number of minutes per day for each x segments

Base: All have mobile phone:

Average No of Minutes Per Day

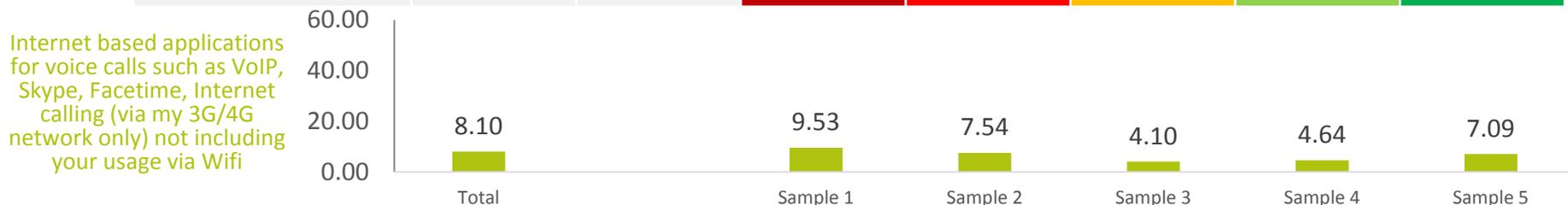
Base: All smartphone	2220	426	438	474	544	338
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Mean 2017	33.33	35.25	29.82	33.16	25.47	24.41
Standard Deviations	60.43	59.45	71.18	62.50	49.41	49.73

Average No of Minutes Per Day

Base: All have smartphone	2220	426	438	474	544	338
----------------------------------	-------------	------------	------------	------------	------------	------------

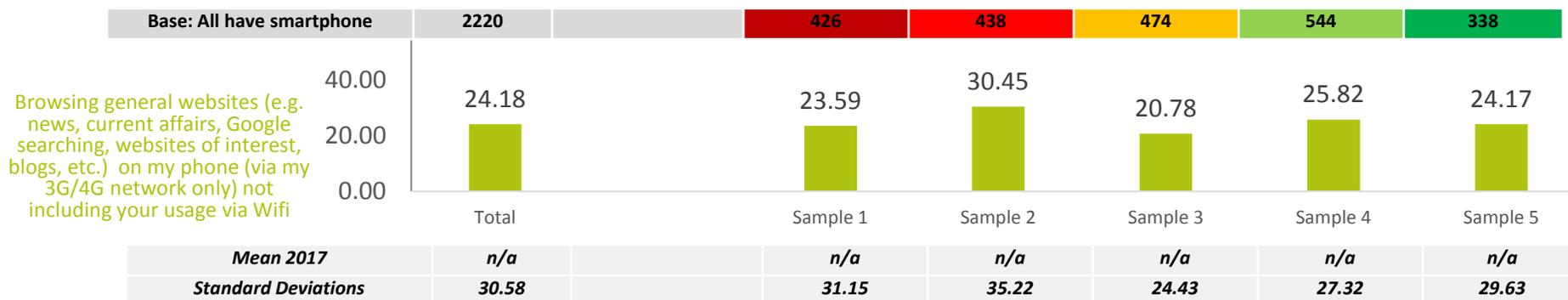
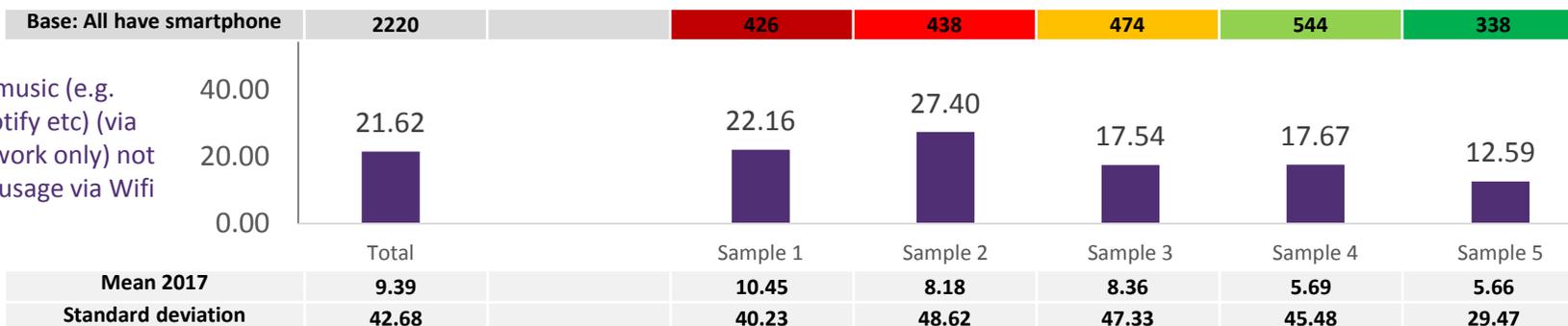
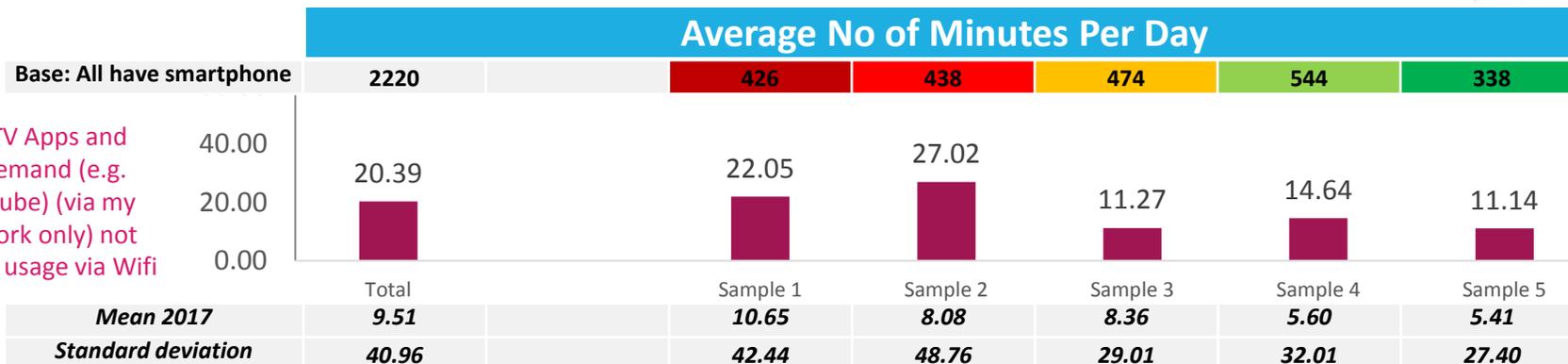


Mean 2017	8.19	9.28	7.33	6.50	4.66	4.67
Standard deviation	25.32	29.23	17.51	12.92	14.75	17.67



Average number of minutes per day for each x segments

Base: All have mobile phone:

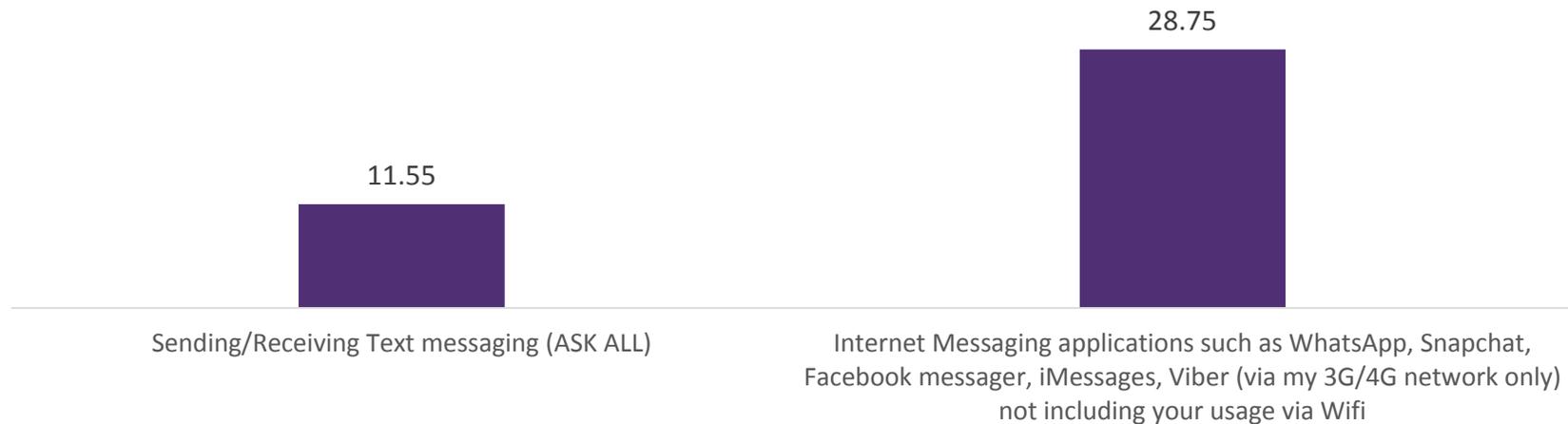


Average no. of sending/receiving text messaging vs internet messaging applications

Base: All have mobile/all smartphone users

Average No of text/messages per day

	All mobile phone		All smartphone
Unweighted	2780		2220



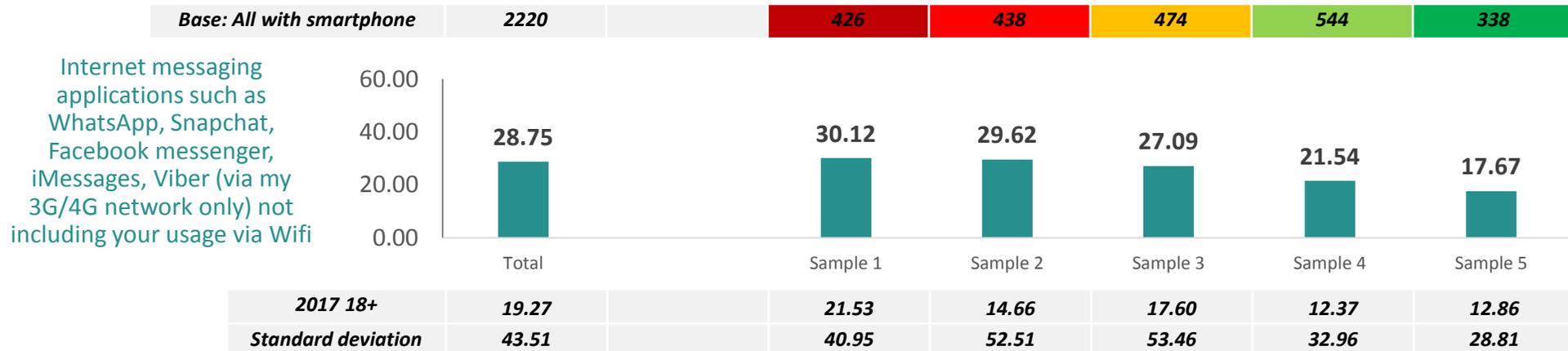
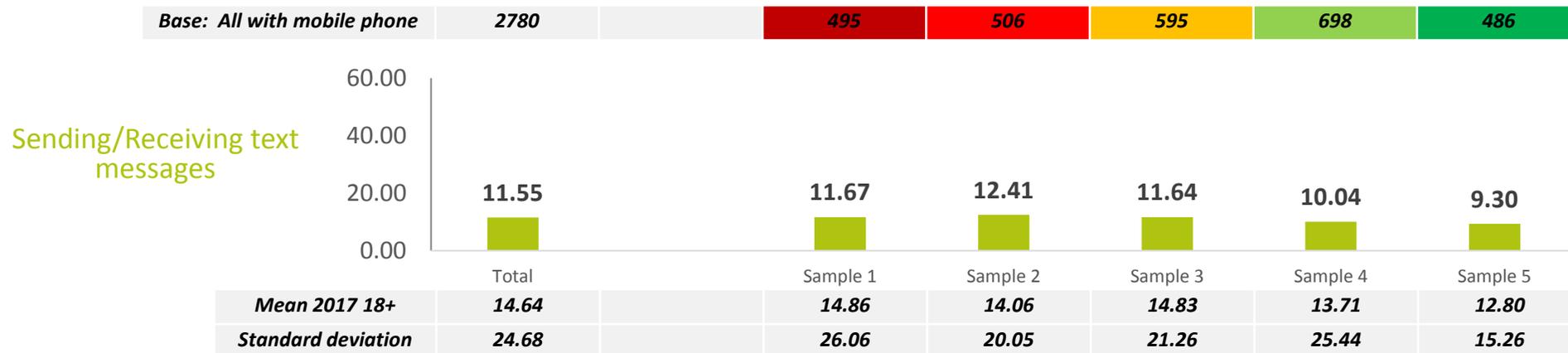
2017 Mean	14.64		19.27
Median	5.00		15.00
Standard deviation	20.32		43.51

**Answers are not mutually exclusive*

Average number of text/internet messaging messages sent/received x Samples

Base: All have mobile phone:

Average No of text messages per days



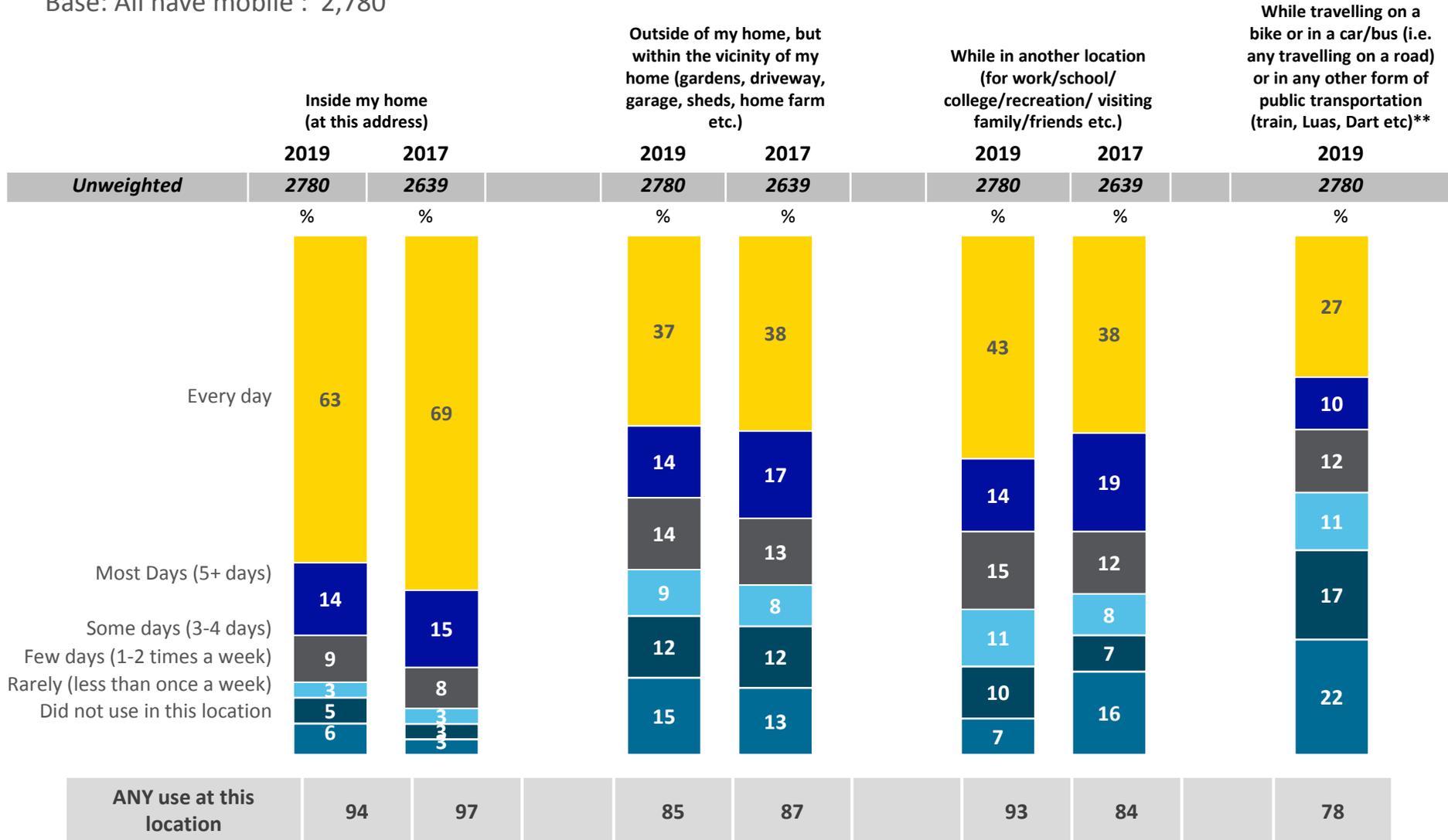
Q.14b Number of messages per day for Making/Receiving Traditional mobile voice call (ASK ALL)

Q.14c Number of messages per day for Internet Messaging applications such as WhatsApp, Snapchat, Facebook messenger, iMessages, Viber (via my 3G/4G network only) not including your usage via Wifi



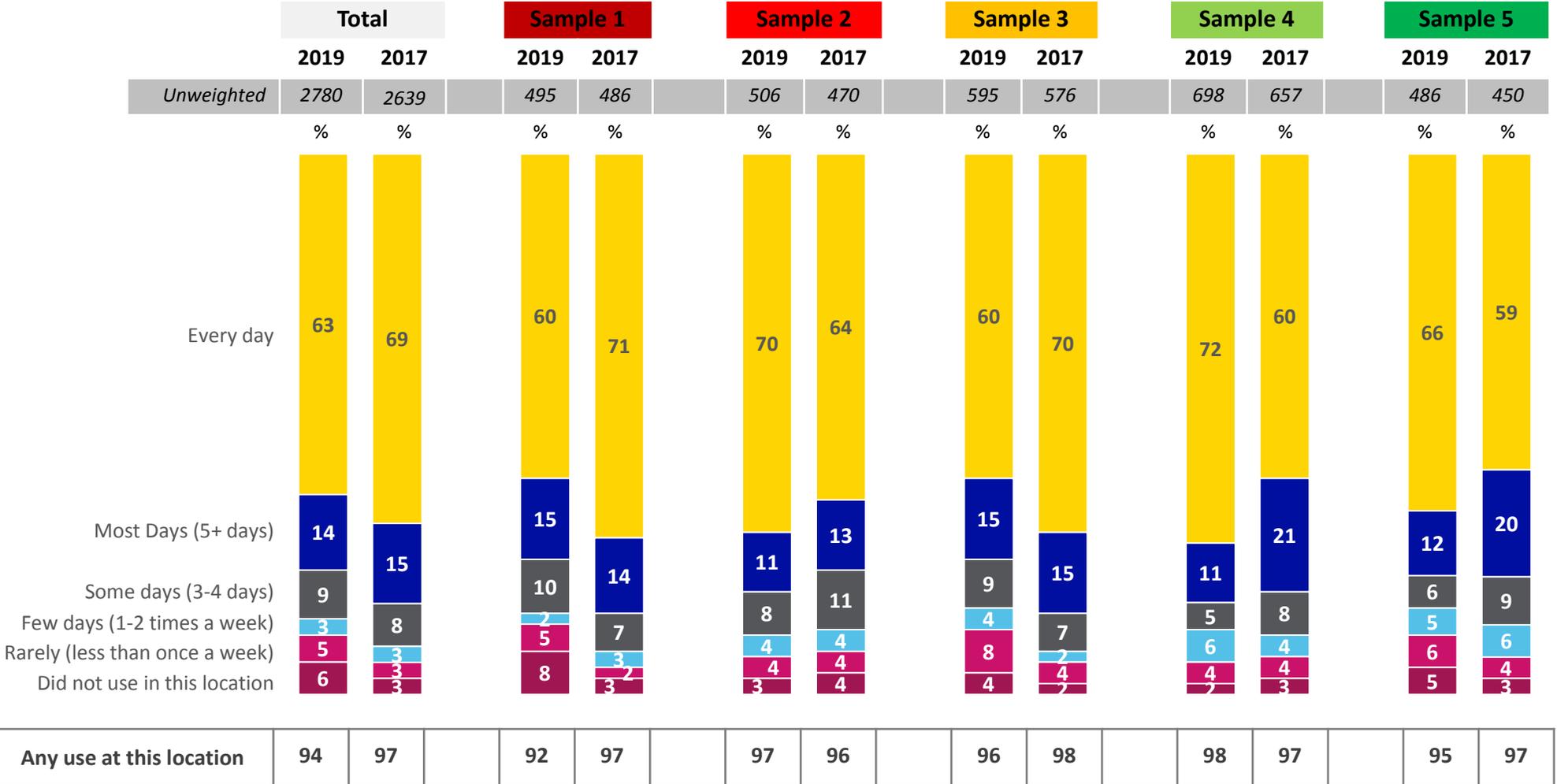
Frequency of using mobile for voice calls and texts on the operators network at various locations during past week

Base: All have mobile : 2,780



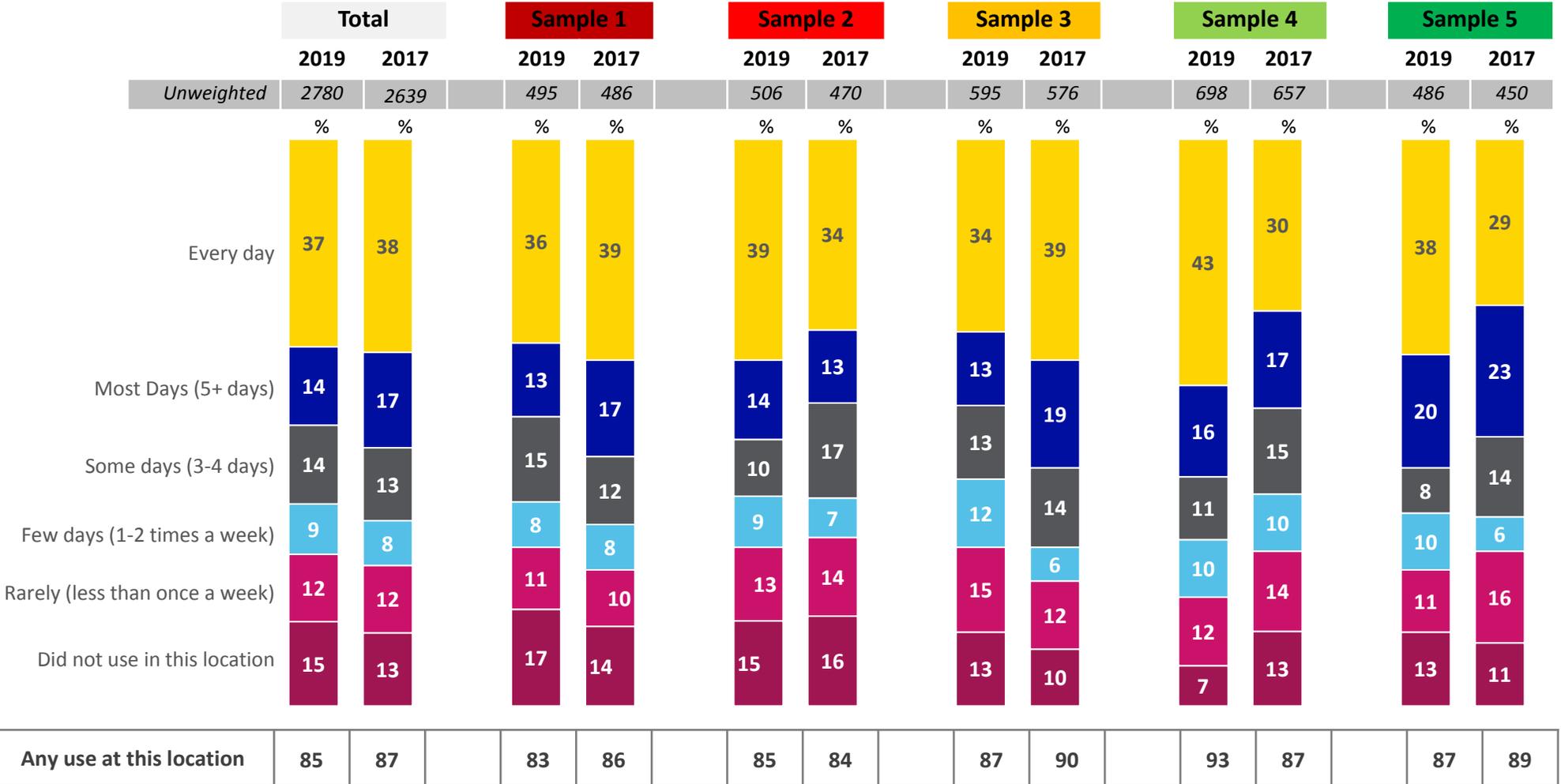
Frequency of using mobile for voice calls and texts on the operators network inside my home

Base: All have mobile :



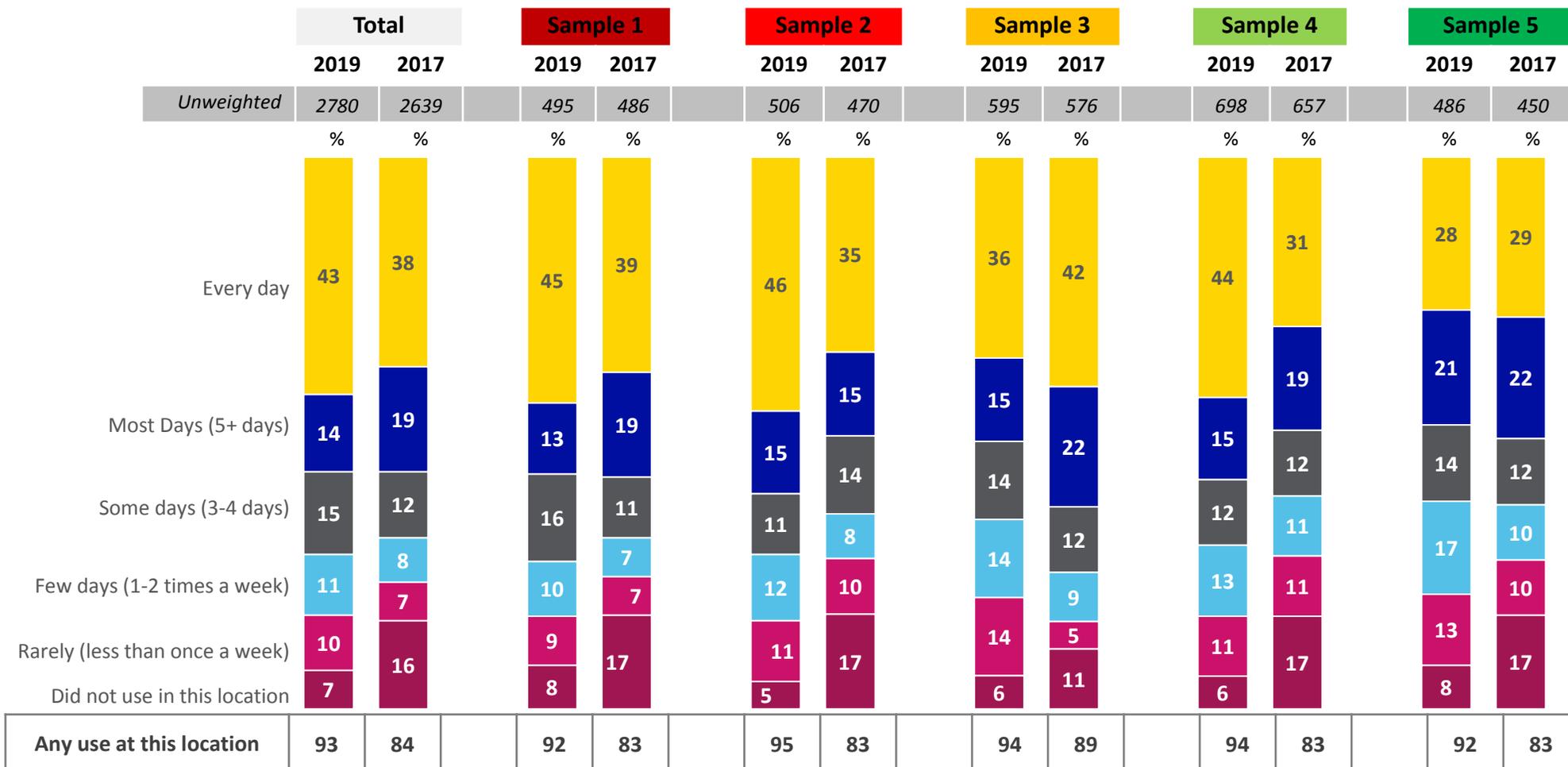
Frequency of using mobile for voice calls and texts on the operators network outside my home

Base: All have mobile :



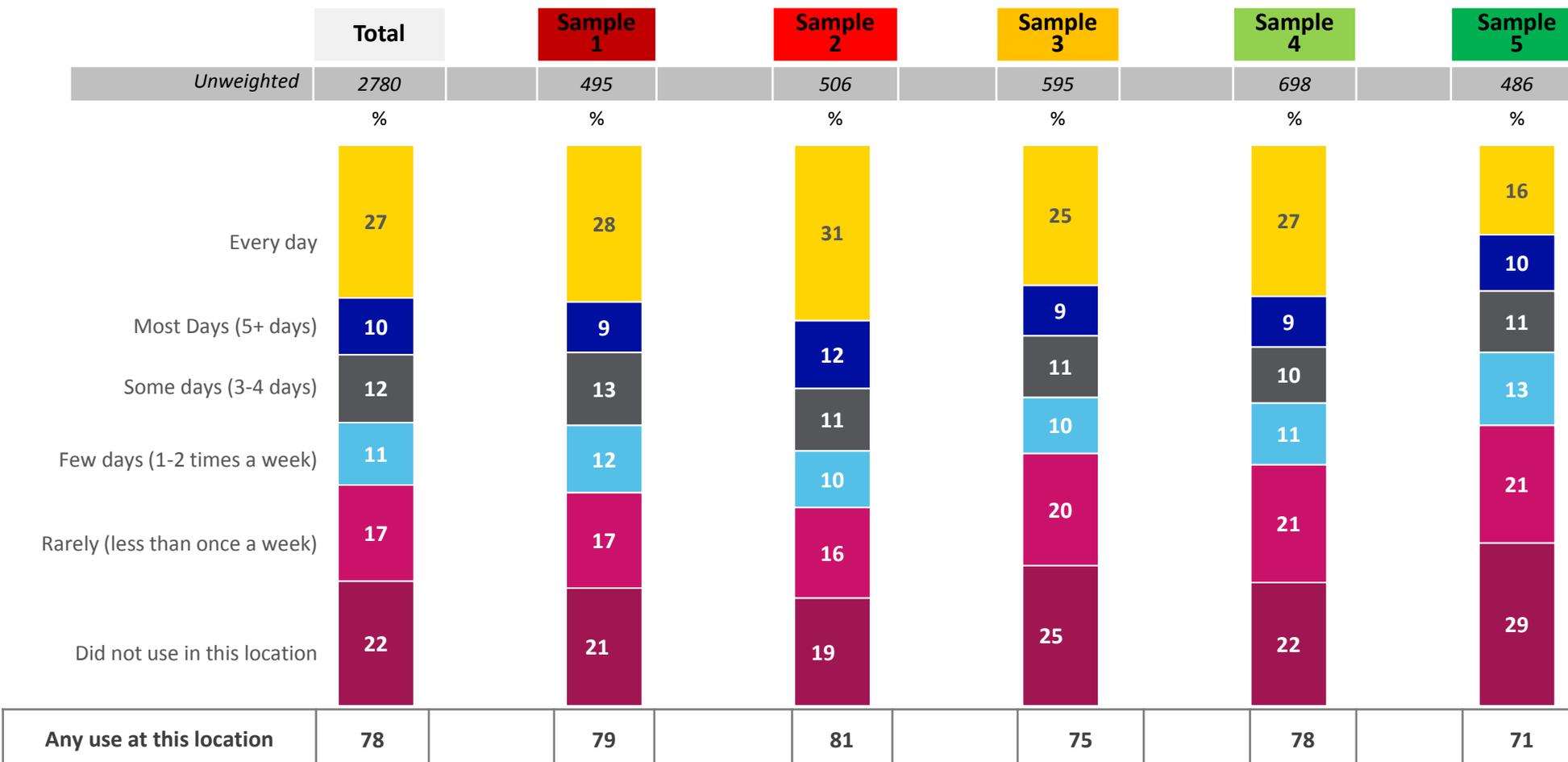
Frequency of using mobile for voice calls and texts on the operators network while in another location

Base: All have mobile : 2780



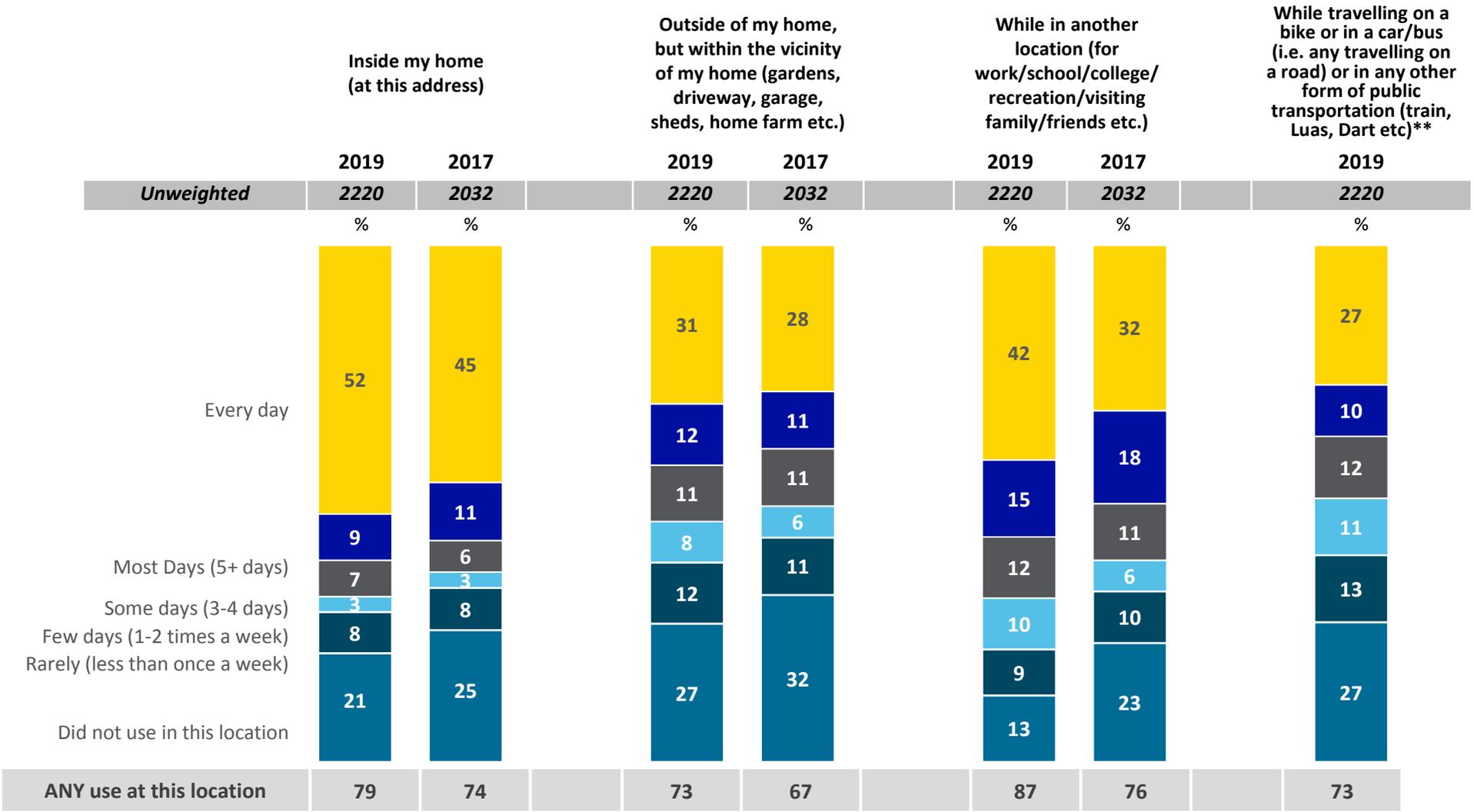
Frequency of using mobile for voice calls and texts on the operators network while in travelling in car/bus or in any other form of public transportation (2019 only)

Base: All have mobile : 2780



Frequency of using mobile data on the operators network at various locations during past week

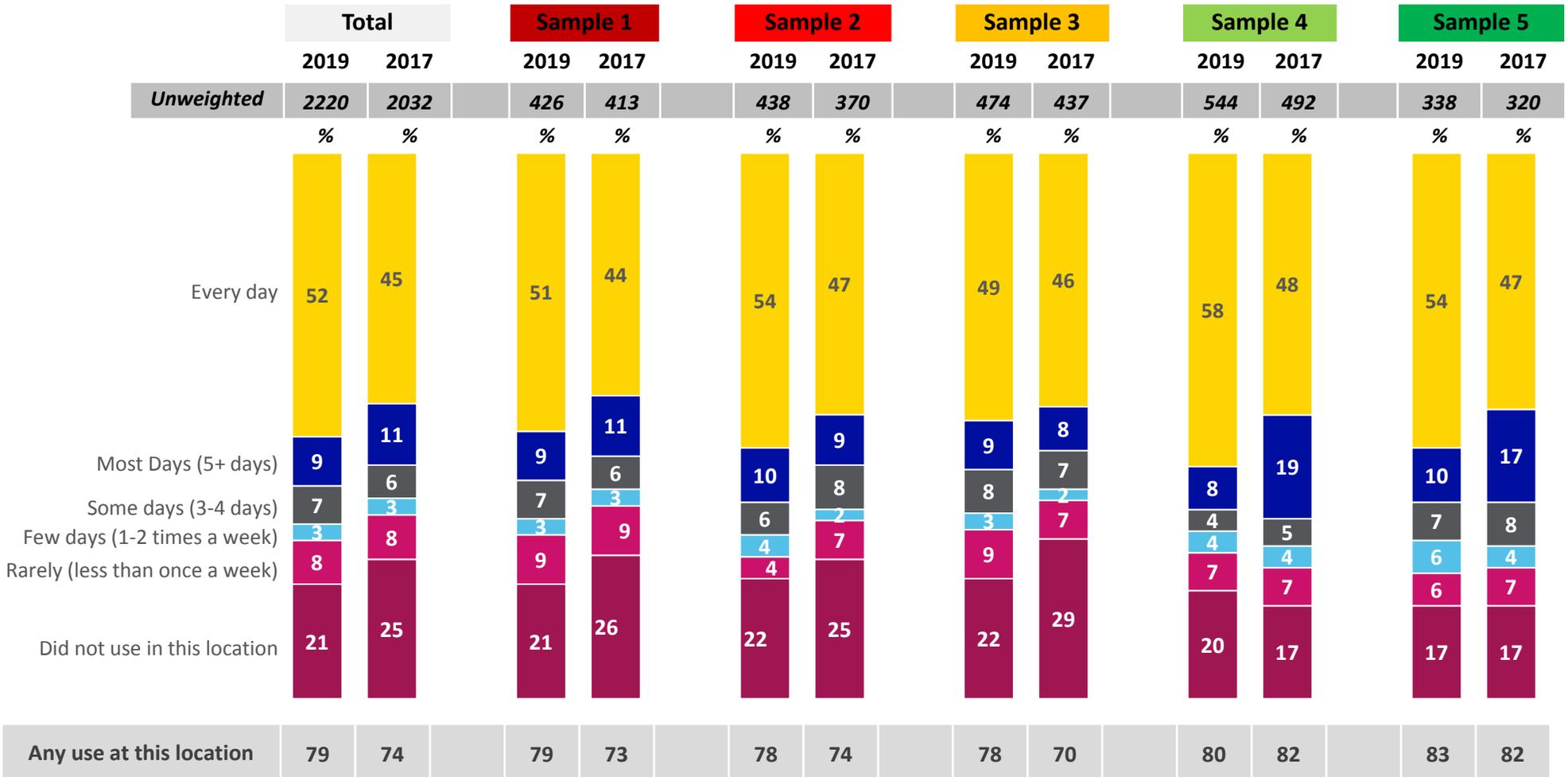
Base: All have smartphone : 2220



ONLY THOSE WITH A SMART PHONE AT Q.12 TO BE ASKED DATA QUESTIONS. Q.15a Thinking back on the past week, how often in the following locations, did you typically use your mobile for data (internet access) on the operators network (i.e. not using wifi on bus, café, home etc.) ?

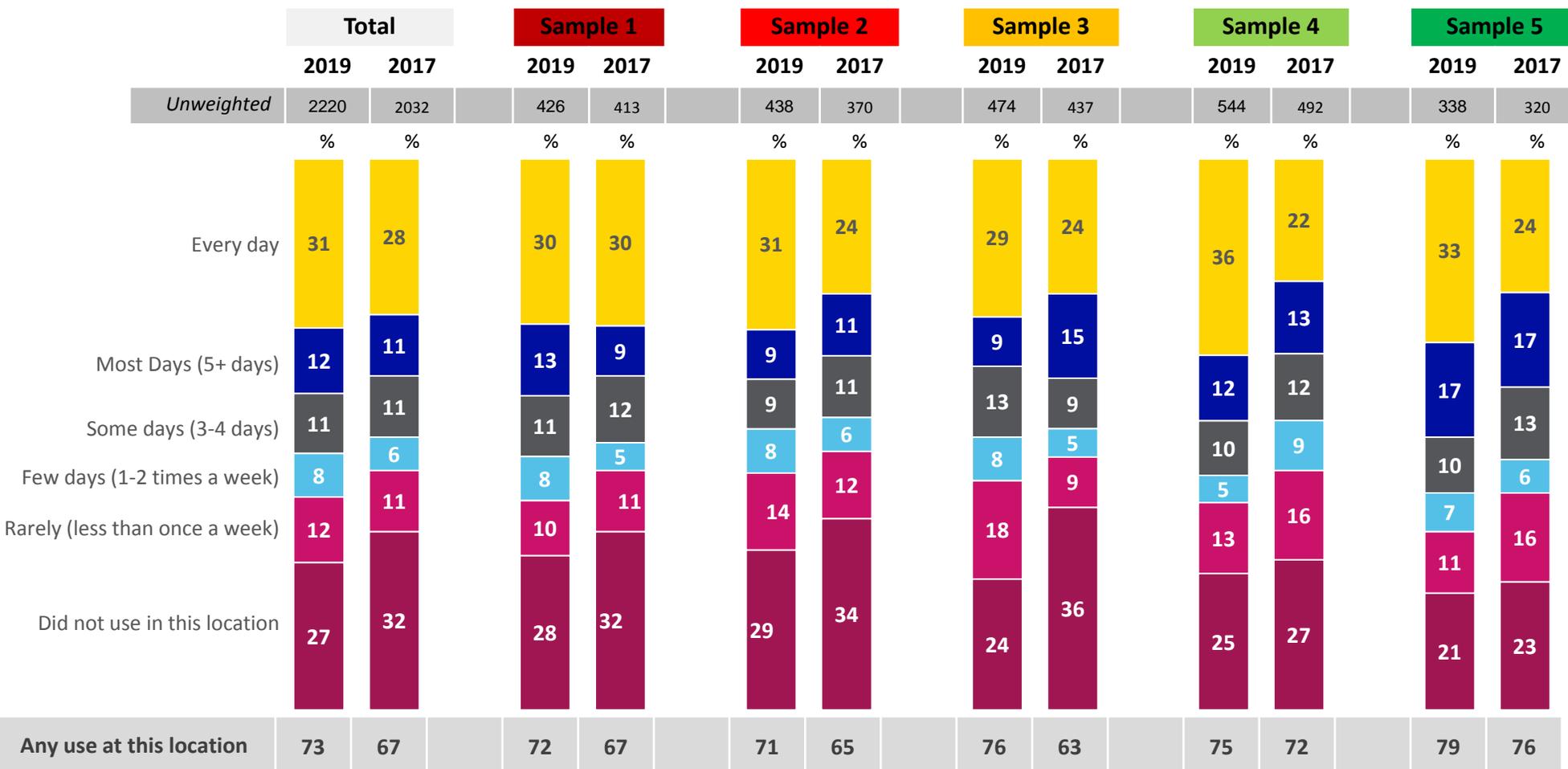
Frequency of using mobile data on the operators network inside my home during past week

Base: All have smartphone: 2220



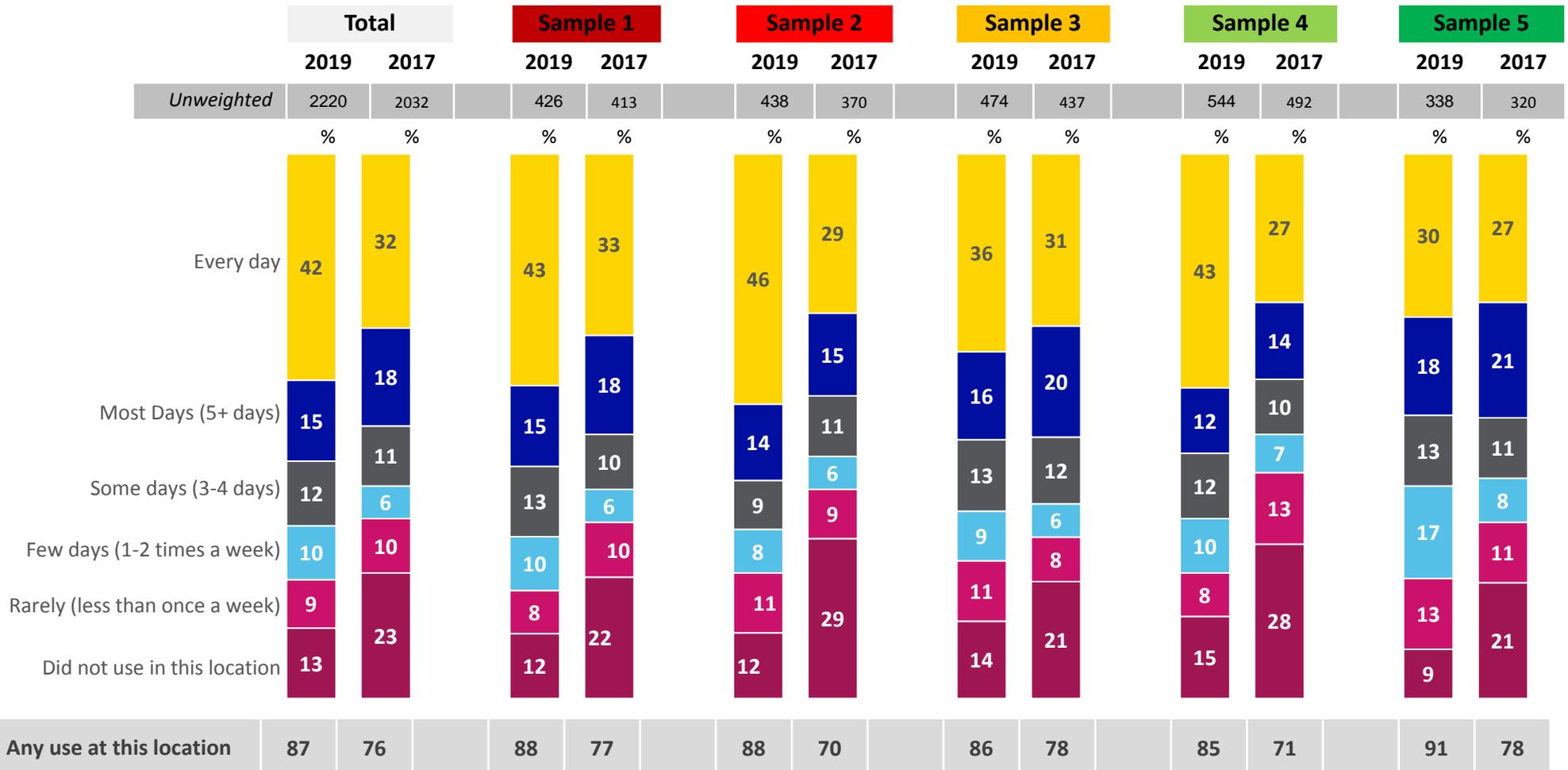
Frequency of using mobile data on the operators network outside my home during past week

Base: All have smartphone : 2220



Frequency of using mobile data on the operators network while in another location during past week

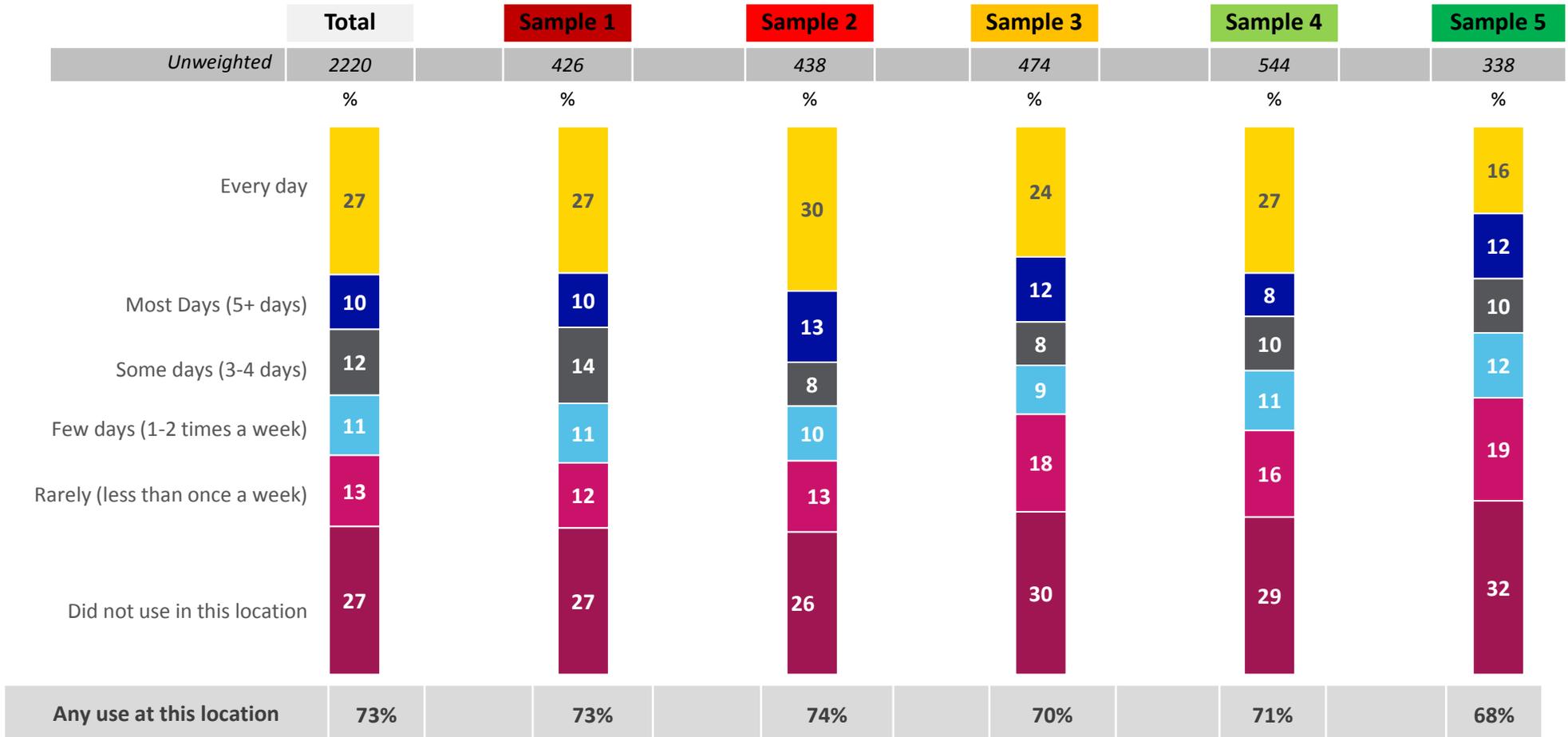
Base: All have smartphone : 2220



ONLY THOSE WITH A SMART PHONE AT Q.12 TO BE ASKED DATA QUESTIONS. Q.15a Thinking back on the past week, how often in the following locations, did you typically use your mobile for data (internet access) on the operators network (i.e. not using wifi on bus, café, home etc.) ?

Frequency of using mobile data on the operators network while travelling in a car/bus during past week or when in any form of public transportation (2019 only)

Base: All have smartphone :



Importance of mobile phone service when at various location

Base: All used in location during past week

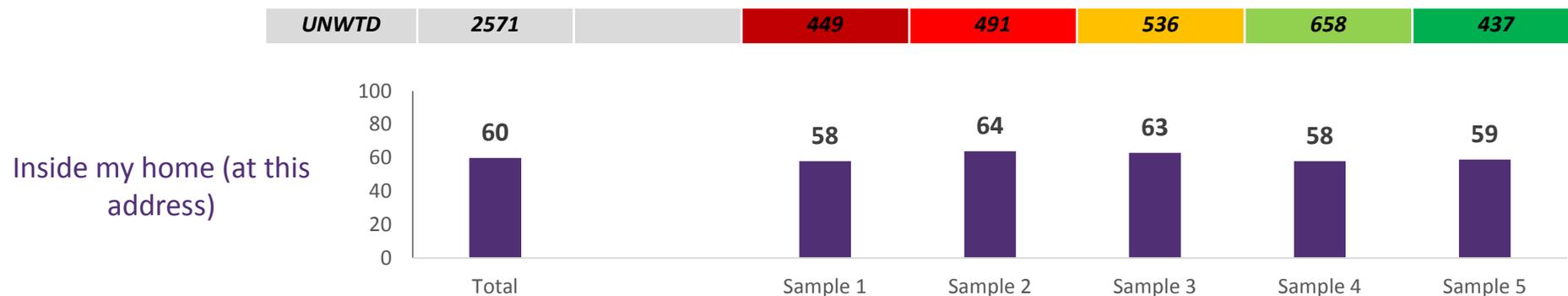


Q17 Thinking about your everyday use of your mobile phone, how important is your mobile phone service to you, when you are in the following places, or engaged in the following activities? Please use the scale on this (and where 0 = not really that important and 10 = it is critically important to me)

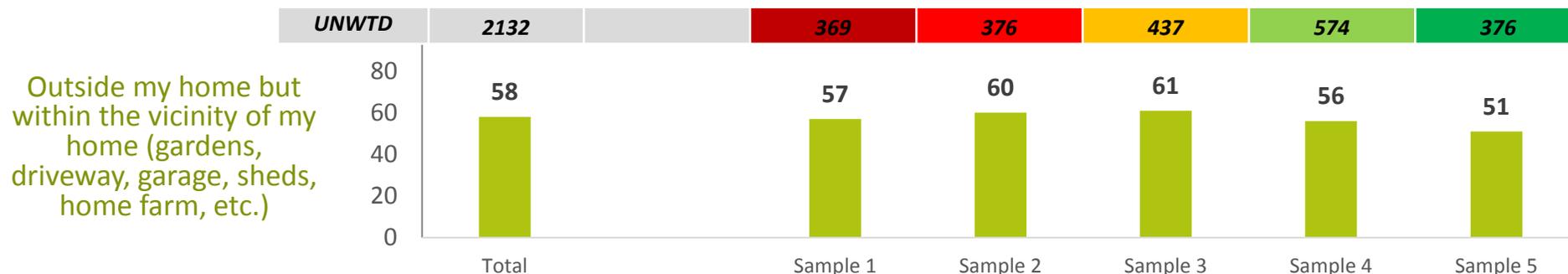


Importance of mobile phone service at various locations x segments - 9-10 scores (critical)

Base: All use mobile at each location during past week



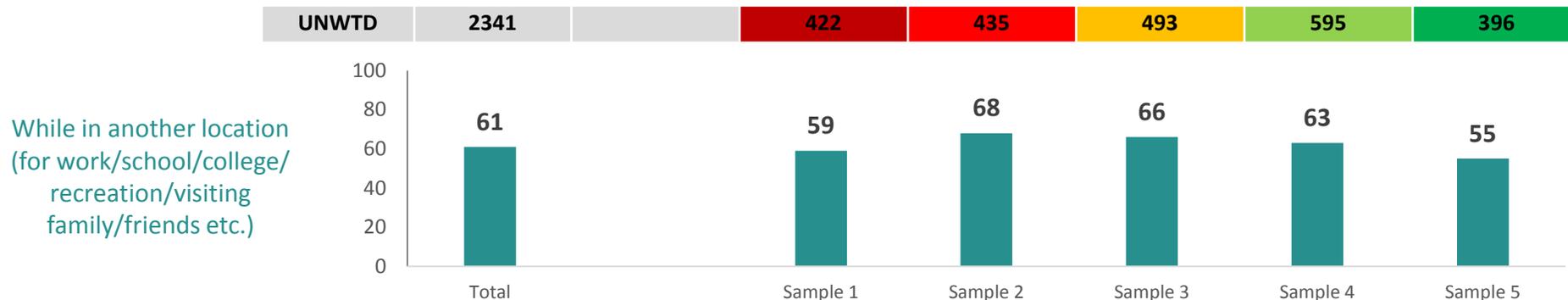
UNWTD	2571	449	491	536	658	437
9-10 Score 2017	56	56	54	55	59	51



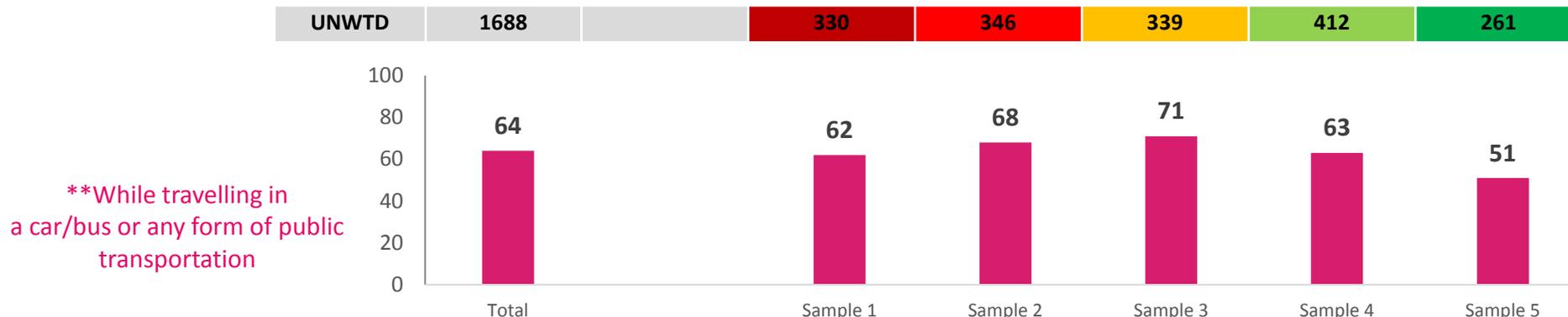
UNWTD	2132	369	376	437	574	376
9-10 Score 2017	50	50	51	49	52	50

Importance of mobile phone service at various locations x segments - 9-10 scores

Base: All use mobile at each location during past week



9-10 Score 2017	55	55	51	58	60	56
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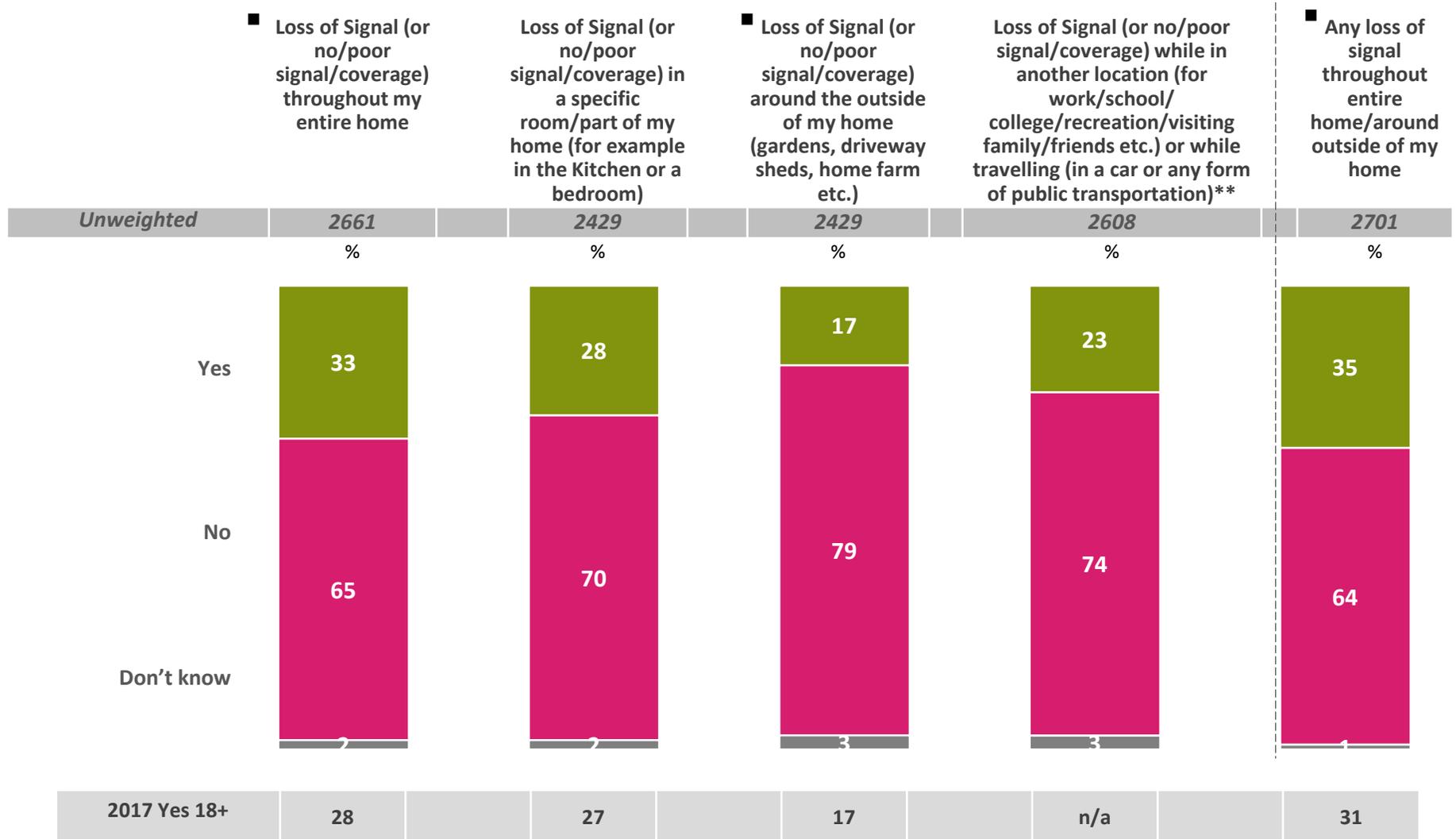
9-10 Score 2017	52	50	52	56	62	53
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Mobile coverage/signal issues experienced

Incidence of experiencing various service issues for voice calls and texts during past month at particular location

Base: All use mobile for voice calls and texts at various location



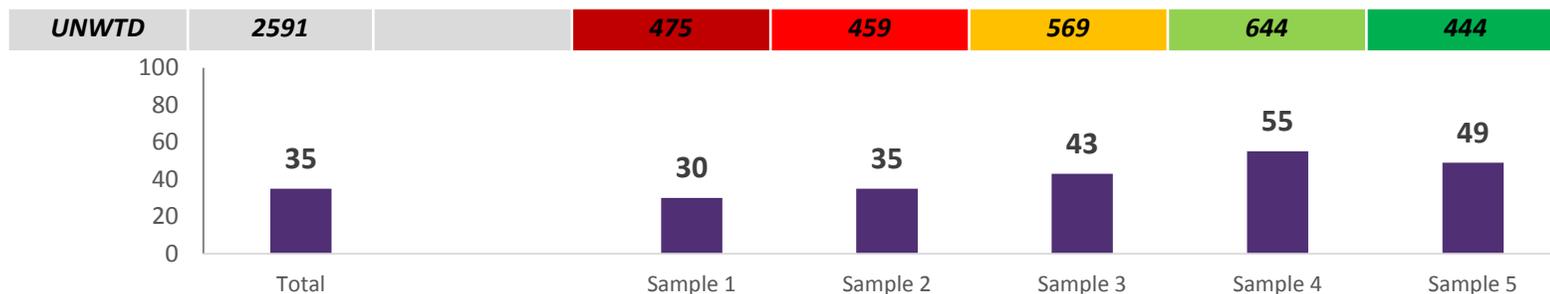
Q18a Thinking about your mobile phone experience over the past month, have you experienced the following for voice calls and texts.



Incidence of experiencing various service issues at particular locations during past month x segments - % Yes

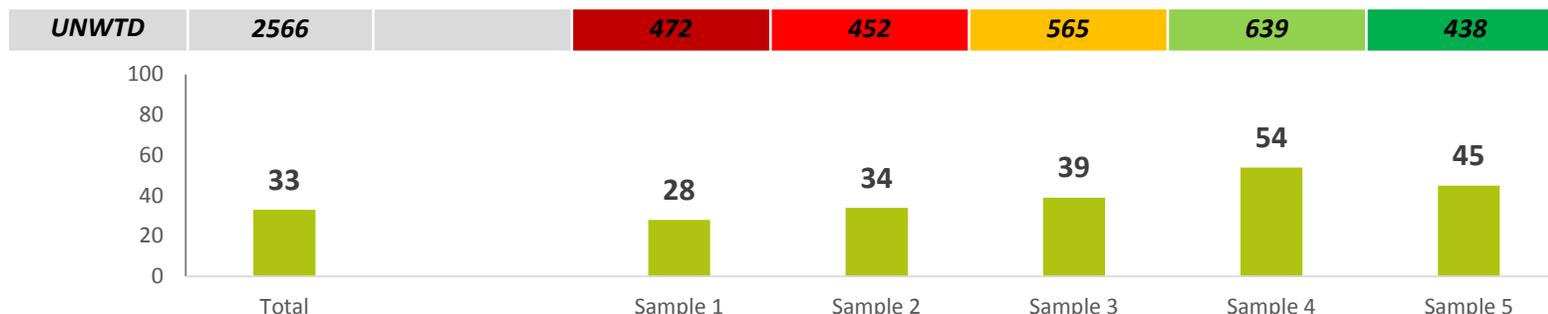
Base: All use mobile for voice calls and texts at various location

■ Any loss of Signal throughout my entire home / around the outside of my home



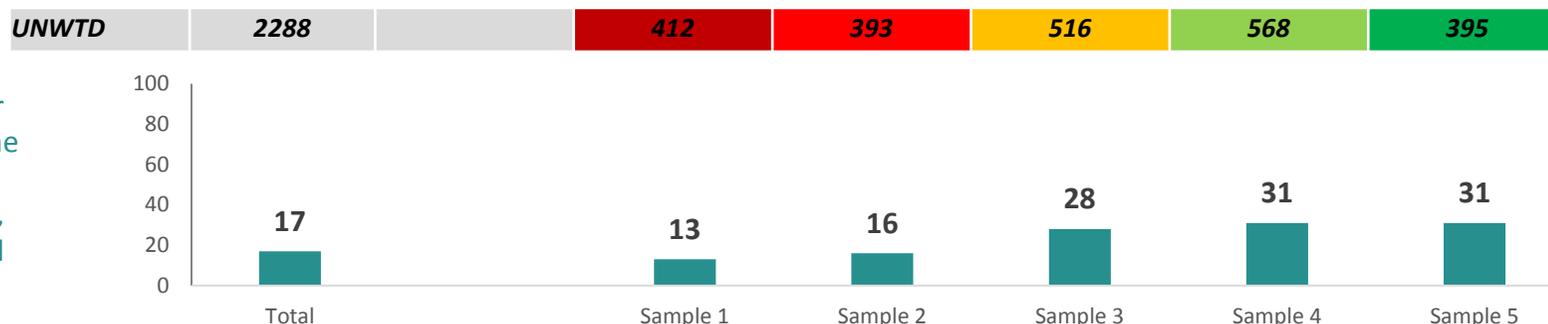
Yes 2017	31	26	31	44	39	43
----------	----	----	----	----	----	----

■ Loss of Signal (or no/poor signal/coverage) throughout my entire home voice call and texts



Yes 2017	28	24	29	41	36	40
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■ Loss of Signal (or no/poor signal/coverage) around the outside of my home (gardens, driveway sheds, home farm etc.) voice call and texts

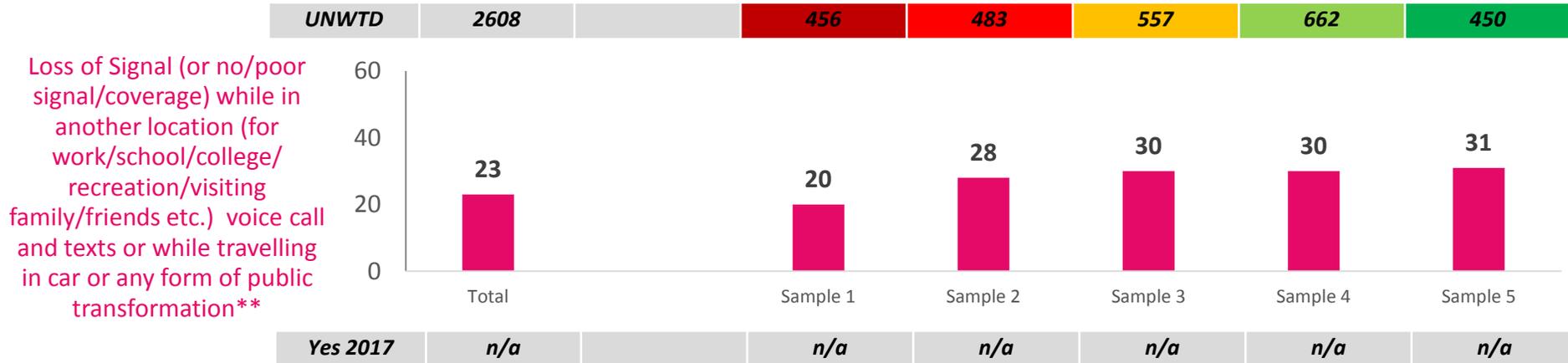
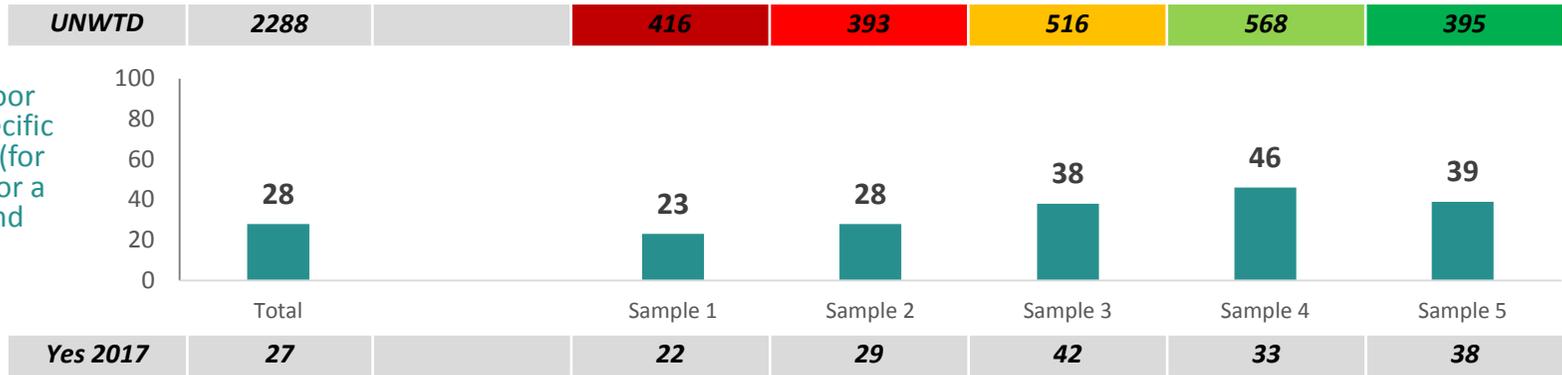


Yes 2017	17	15	15	26	20	28
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Incidence of experiencing various service issues at particular locations during past month x segments - % Yes

Base: All use mobile for voice calls and texts at various location



Incidence of experiencing various service issues for voice calls and texts during past month at particular location

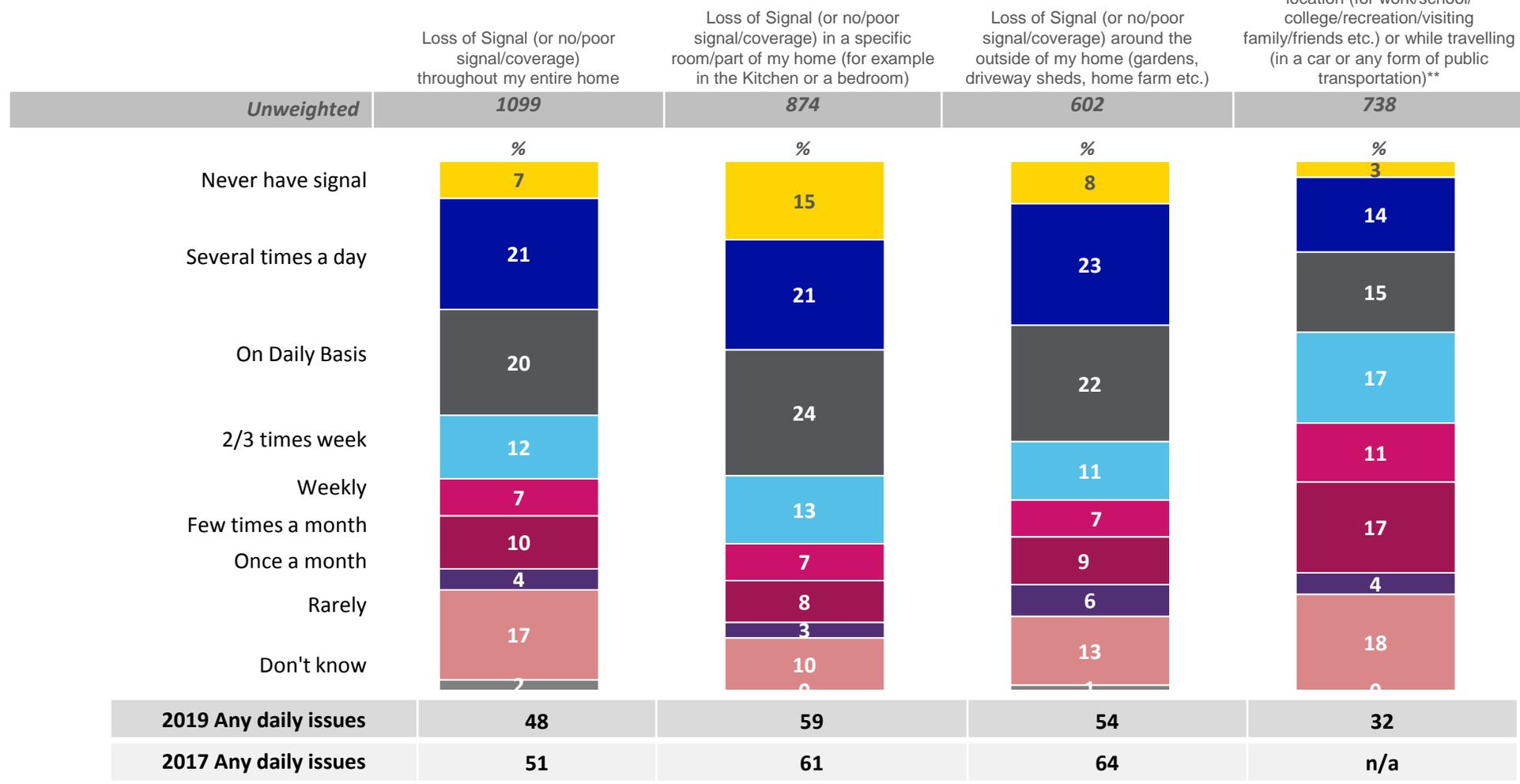
Base: All use mobile for voice calls and texts at various location

	Total	Handset		Age of phone		
		Any Smartphone	Any Non Smartphone	Under 1 year	1-2 years	3+ years
UNWTD	2661	2130	531	467	1184	1010
	%	%				
▪ Loss of Signal (or no/poor signal/coverage) throughout my entire home	33	34	26	32	35	31
Loss of Signal (or no/poor signal/coverage) in a specific room/part of my home (for example in the Kitchen or a bedroom)	28	29	24	27	28	28
▪ Loss of Signal (or no/poor signal/coverage) around the outside of my home (gardens, driveway sheds, home farm etc.)	17	18	13	17	21	14
Loss of Signal (or no/poor signal/coverage) while in another location (for work/school/college/recreation/visiting family/friends etc.) or while travelling (in a car or any form of public transportation)**	23	24	17	27	26	18
▪ Any loss of signal throughout entire home/around outside of my home	35	37	27	34	39	32

Frequency of experiencing various service issues for voice calls and texts at particular locations

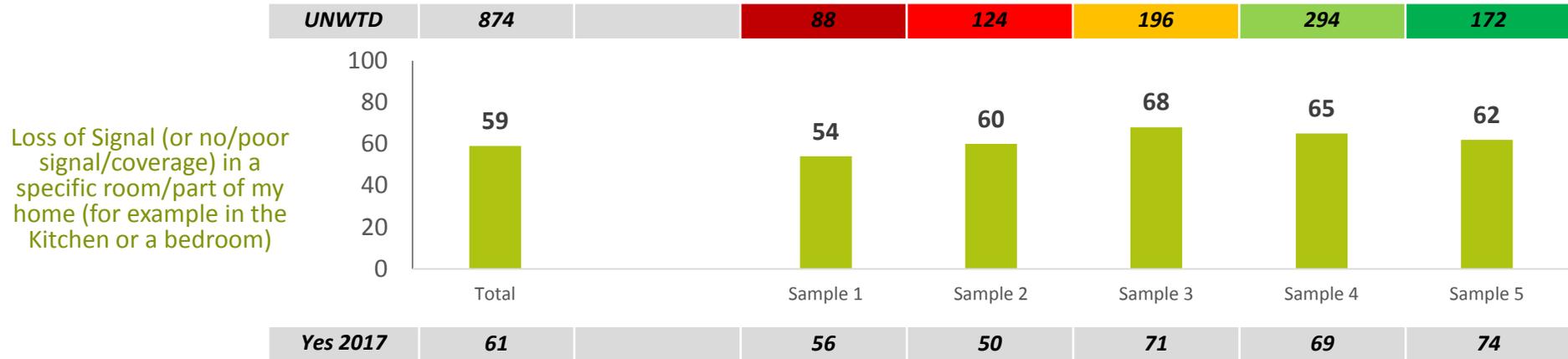
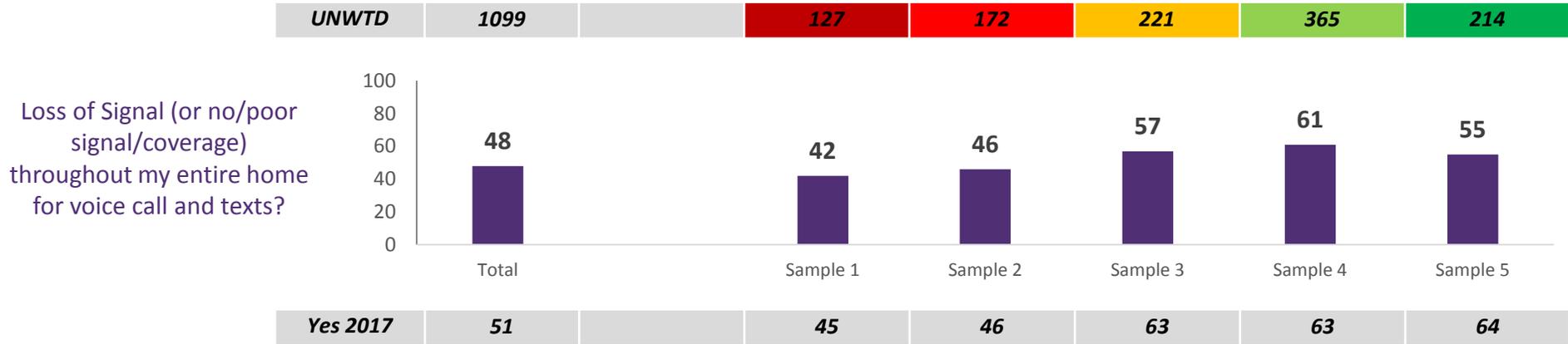
Base: All experienced service issues for voice calls and texts at particular locations during past week

Loss of Signal (or no/poor signal/coverage) while in another location (for work/school/college/recreation/visiting family/friends etc.) or while travelling (in a car or any form of public transportation)**



Daily experiencing various service issues for voice calls and texts at particular locations

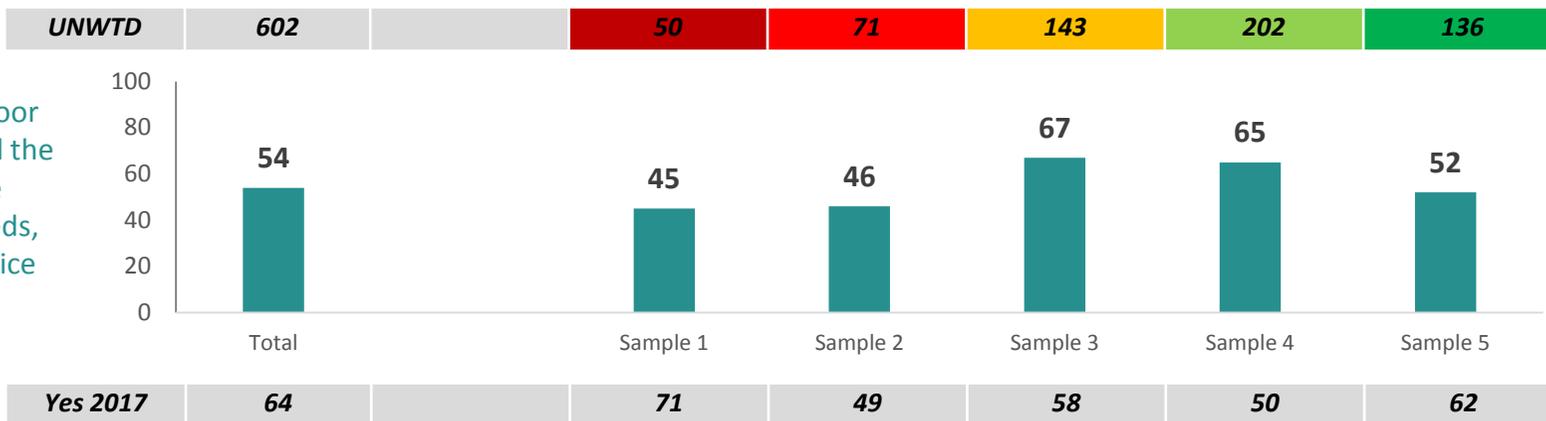
Base: All experienced service issues for voice calls and texts at particular locations during past week



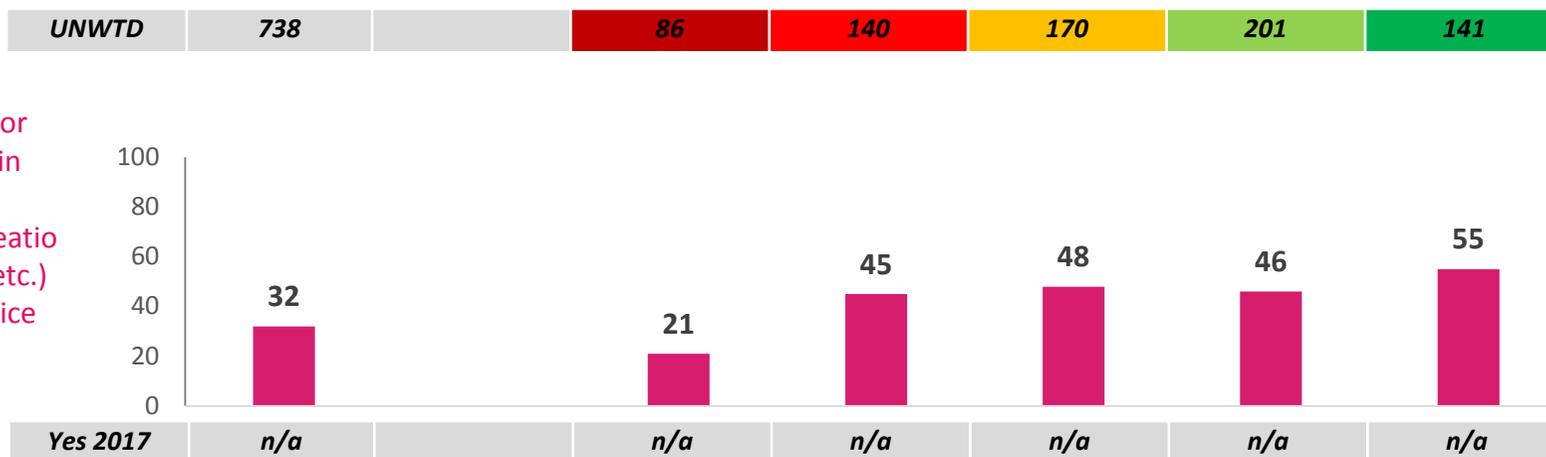
Daily experiencing various service issues for voice calls and texts at particular locations

Base: All experienced service issues for voice calls and texts at particular locations during past week

Loss of Signal (or no/poor signal/coverage) around the outside of my home (gardens, driveway sheds, home farm etc.) for voice call and texts



Loss of Signal (or no/poor signal/coverage) while in another location (for work/school/college/recreation/visiting family/friends etc.) or while travelling for voice call and texts**



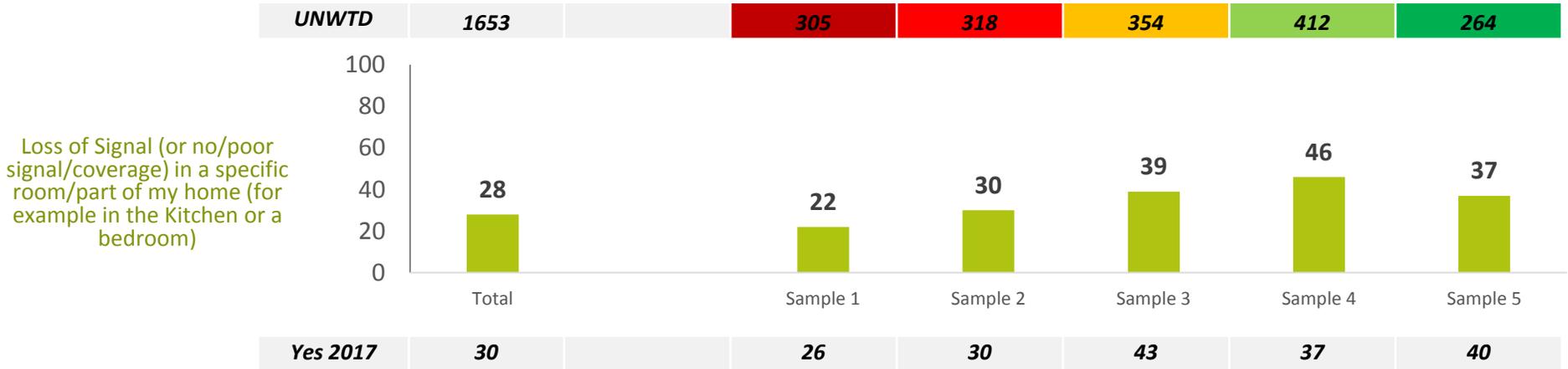
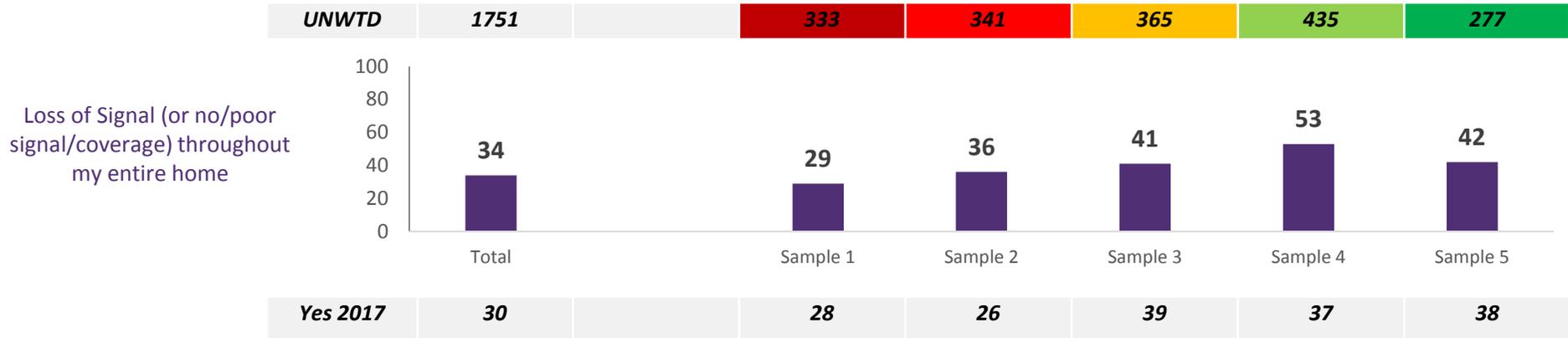
Incidence of experiencing various service issues for data during past month at particular location

Base: All use mobile for data at various locations



Past month incidence of experiencing various service issues for data at particular location x Area

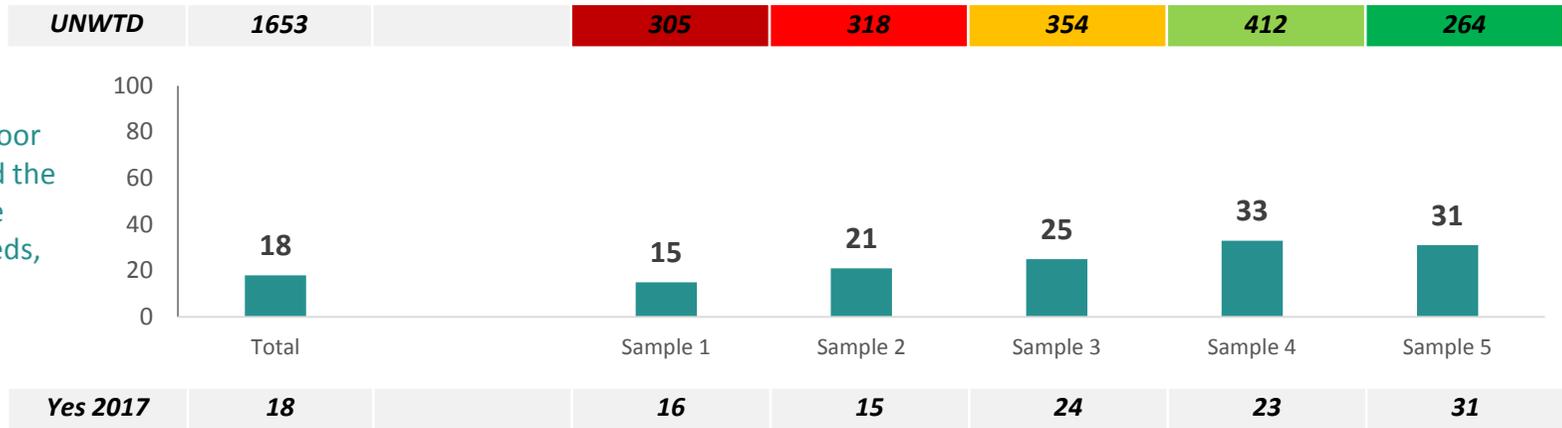
Base: All use mobile for data at various location



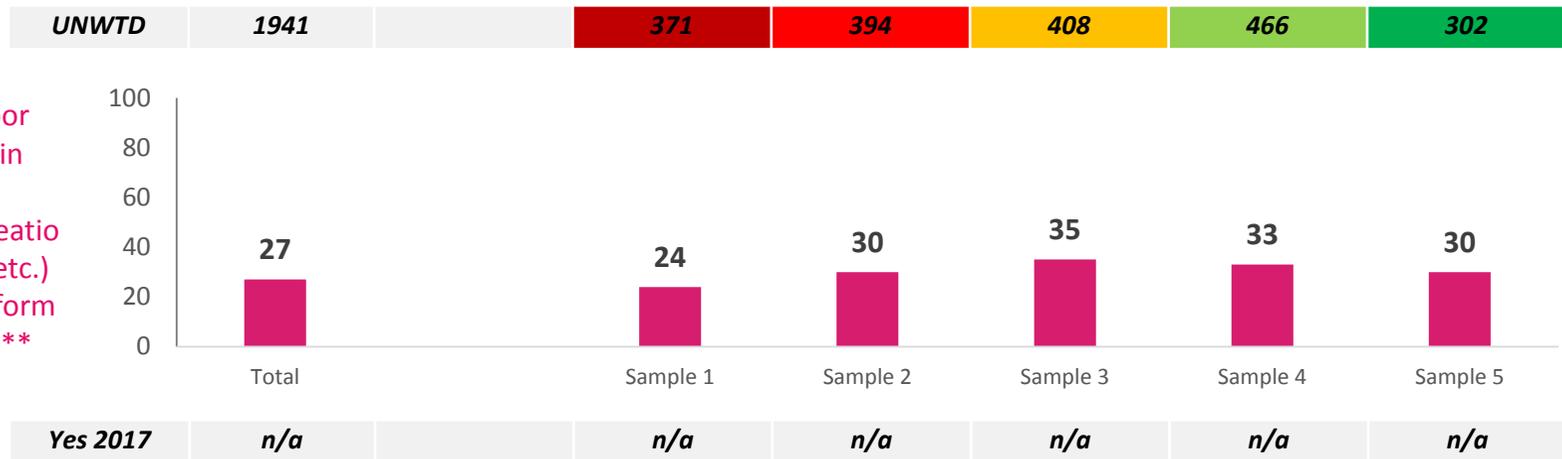
Past month incidence of experiencing various service issues for data at particular location x area

Base: All use mobile for data at various location

Loss of Signal (or no/poor signal/coverage) around the outside of my home (gardens, driveway sheds, home farm etc.)



Loss of Signal (or no/poor signal/coverage) while in another location (for work/school/college/recreation/visiting family/friends etc.) or while travelling in any form of public transportation**



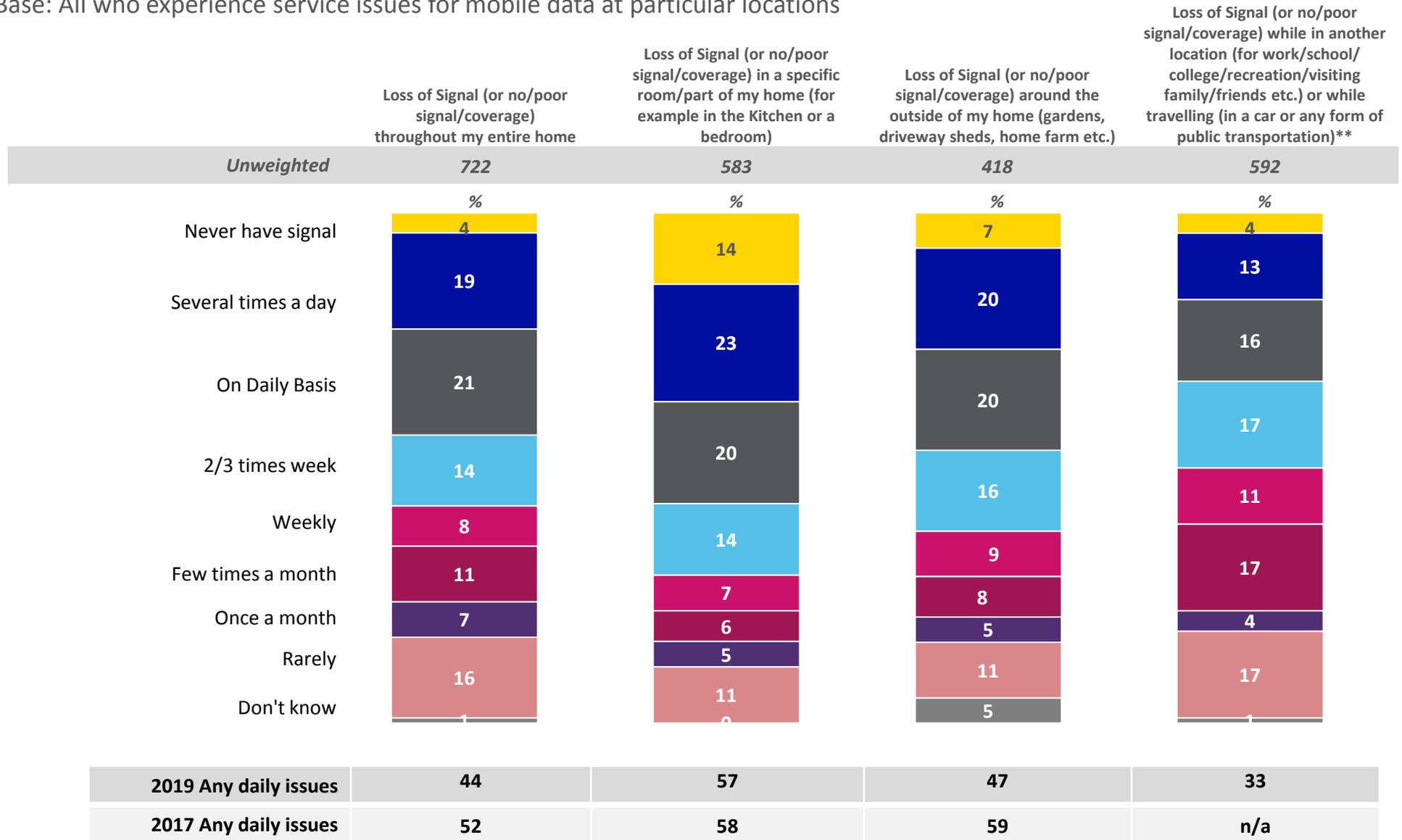
Incidence of experiencing various service issues for data during past month at particular location by handset age

Base: All use mobile for data at various location

	Total	Age of Handset		
		Under 1 year	1-2 years	3+ years
UNWTD	1751	363	932	456
	%	%	%	%
Loss of Signal (or no/poor signal/coverage) throughout my entire home for data	34	36	34	30
Loss of Signal (or no/poor signal/coverage) in a specific room/part of my home (for example in the Kitchen or a bedroom)	28	29	28	27
Loss of Signal (or no/poor signal/coverage) around the outside of my home (gardens, driveway sheds, home farm etc.)	17	18	21	15
Loss of Signal (or no/poor signal/coverage) while in another location (for work/school/college/recreation/visiting family/friends etc.) or while travelling (in a car or any form of public transportation)**	27	30	28	20

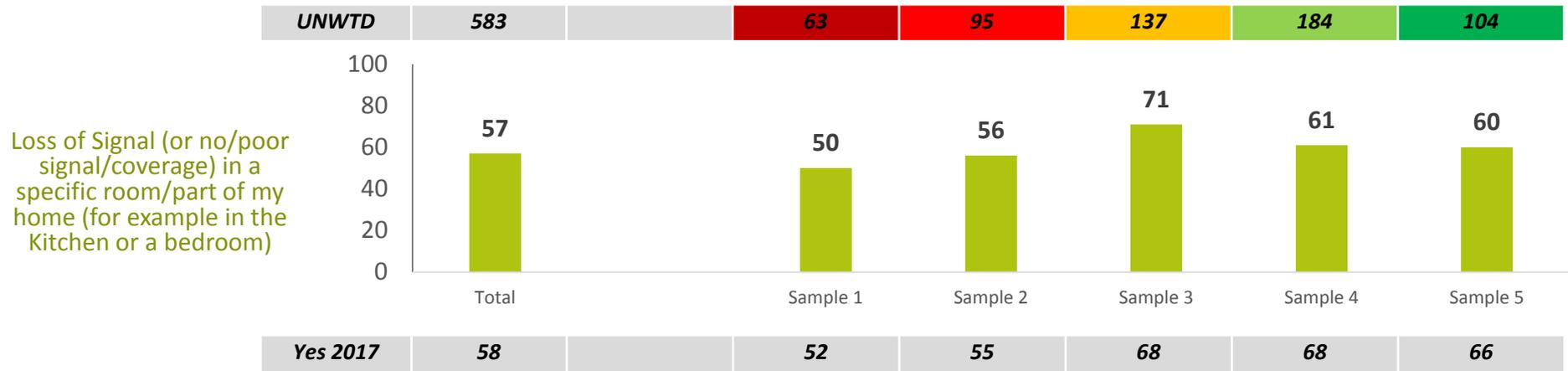
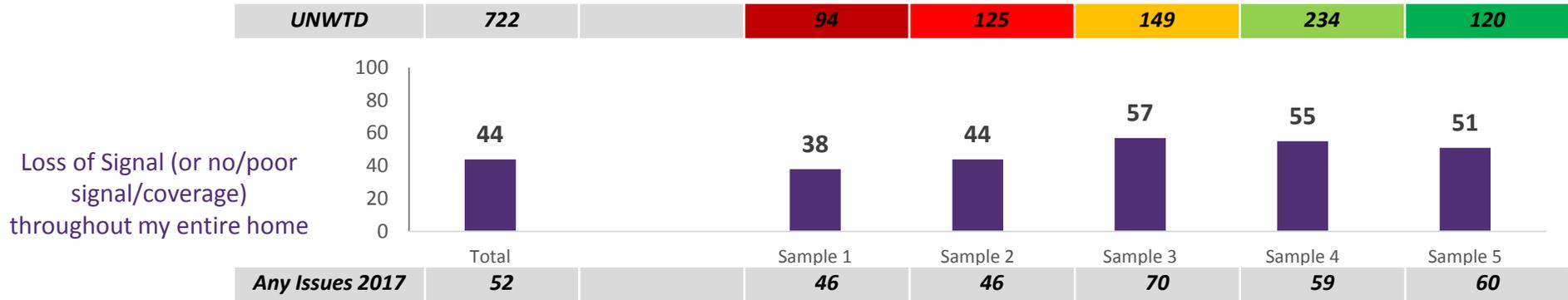
Frequency of experiencing various service issues for data during past month at particular locations

Base: All who experience service issues for mobile data at particular locations



Daily experiencing various service issues for data during past month at particular locations

Base: All who experience service issues for mobile data at particular locations

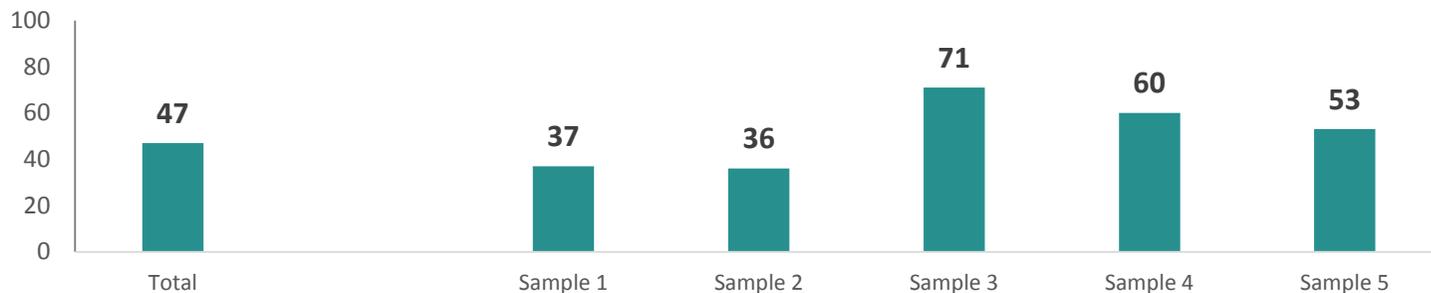


Daily experiencing various service issues for data during past month at particular locations

Base: All who experience service issues for mobile data at particular locations

UNWTD	418		42	67	88	134	87
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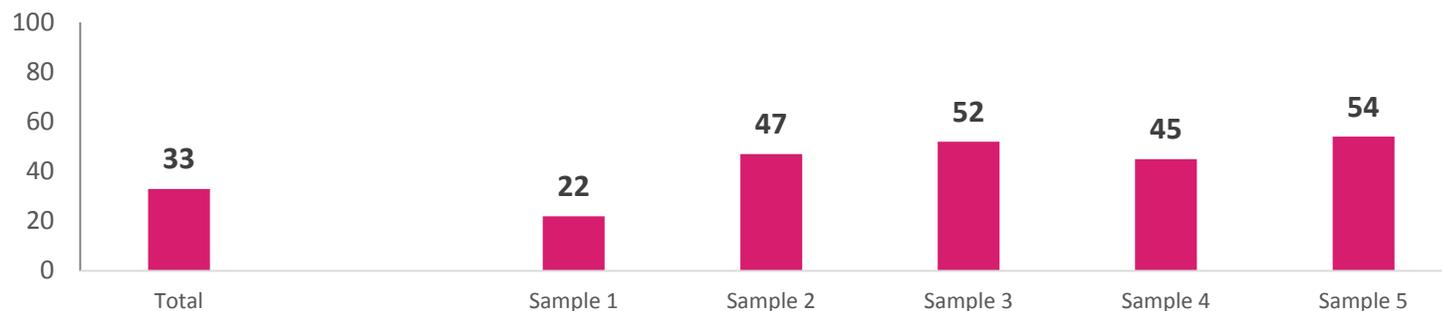
Loss of Signal (or no/poor signal/coverage) around the outside of my home (gardens, driveway sheds, home farm etc.)



Yes 2017	59		61	56	57	55	60
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UNWTD	592		82	120	142	154	94
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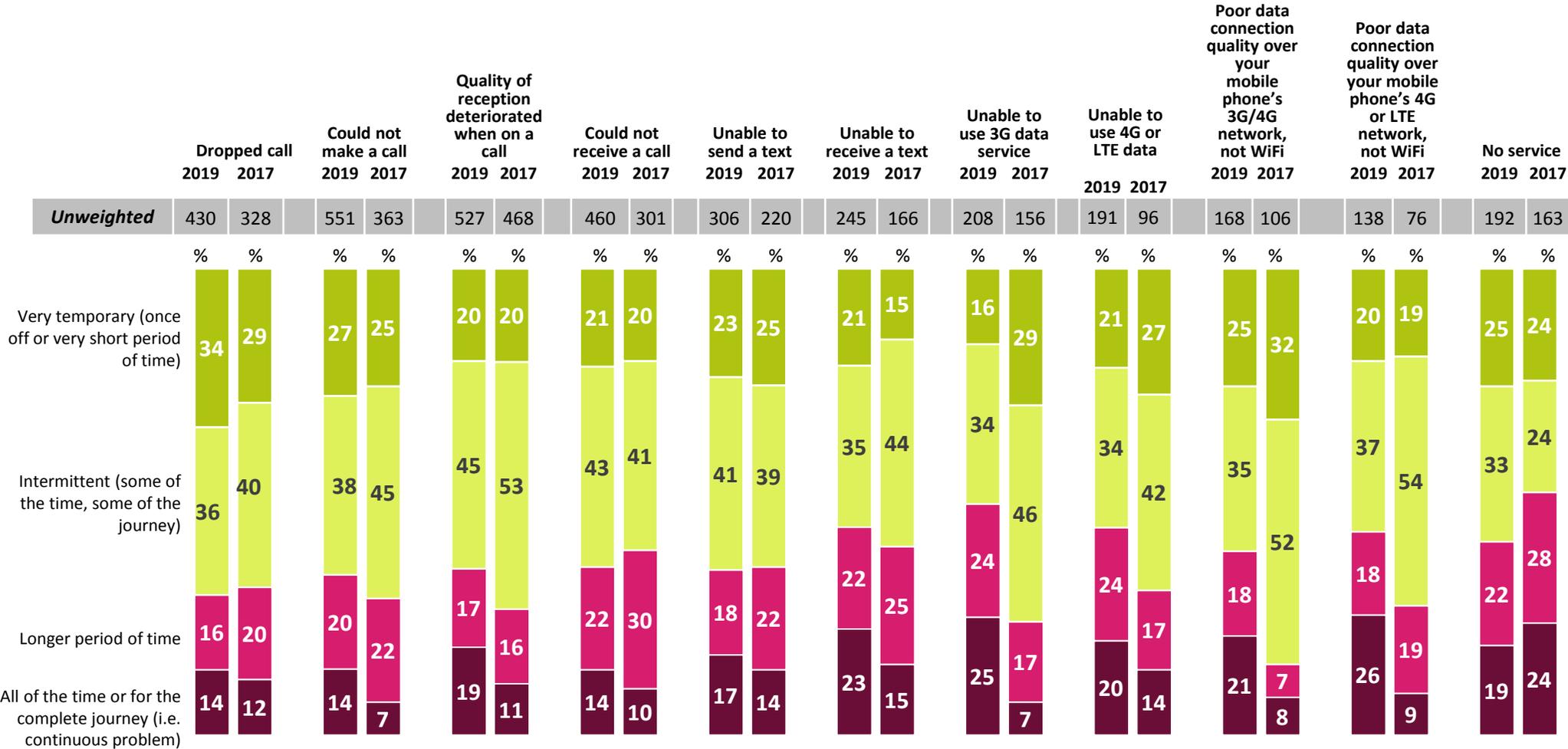
Loss of Signal (or no/poor signal/coverage) while in another location (for work/school/college/recreation/visiting family/friends etc.) or while travelling (in a car or any form of public transportation)**



Yes 2017	n/a		n/a	n/a	n/a	n/a	n/a
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Length of time problem experienced for: Loss of signal (or no/poor signal/coverage) throughout my entire house

Base: All who experienced loss of signal throughout entire home for voice or data – 1,176



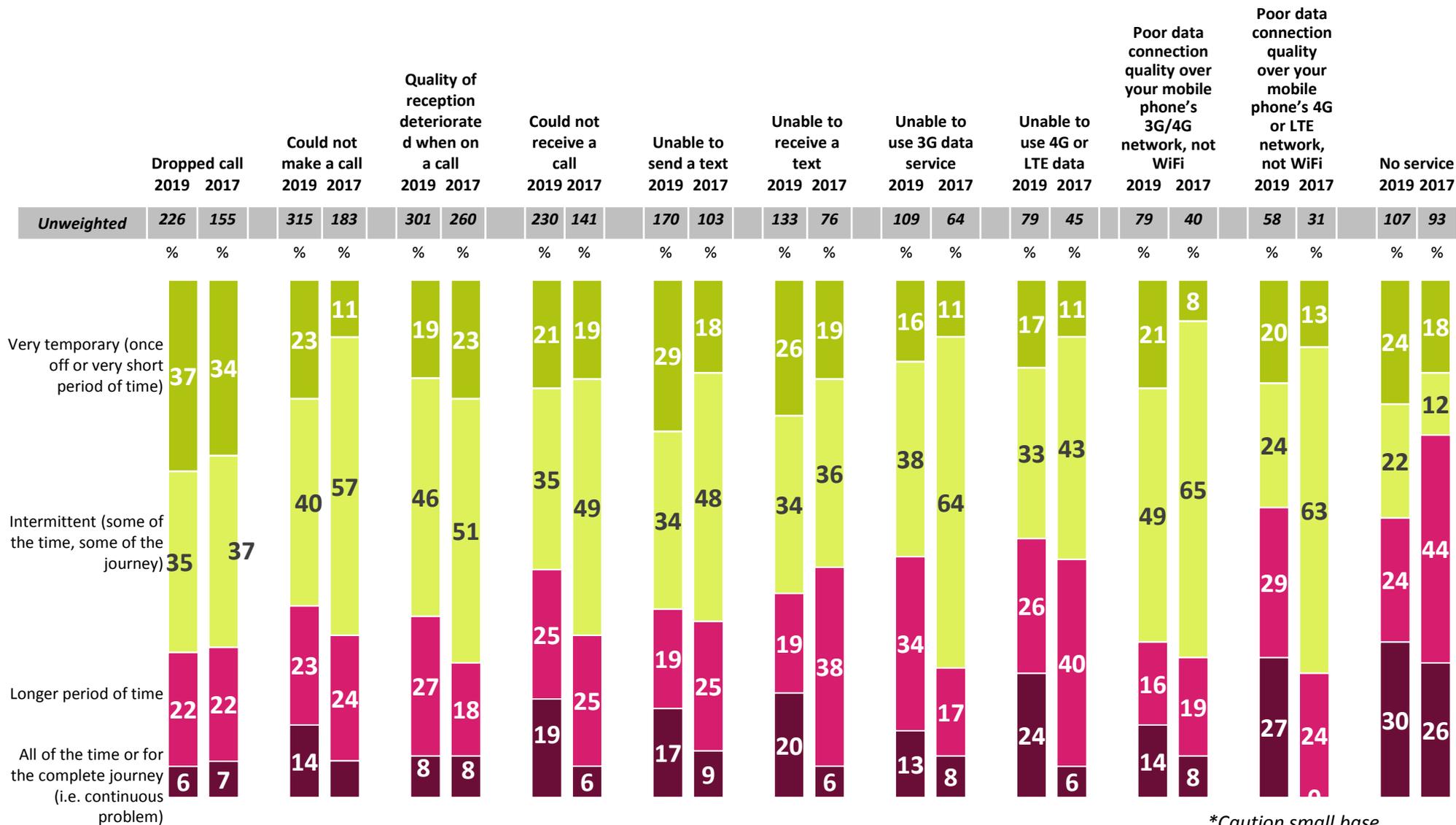
Length of time problem experienced for: Loss of signal in a specific room/part of my home (for example kitchen or bedroom)

Base: All who experienced loss of signal in a specific room/part of home for voice or data - 920



Length of time problem experienced for: Loss of signal around the outside of my home

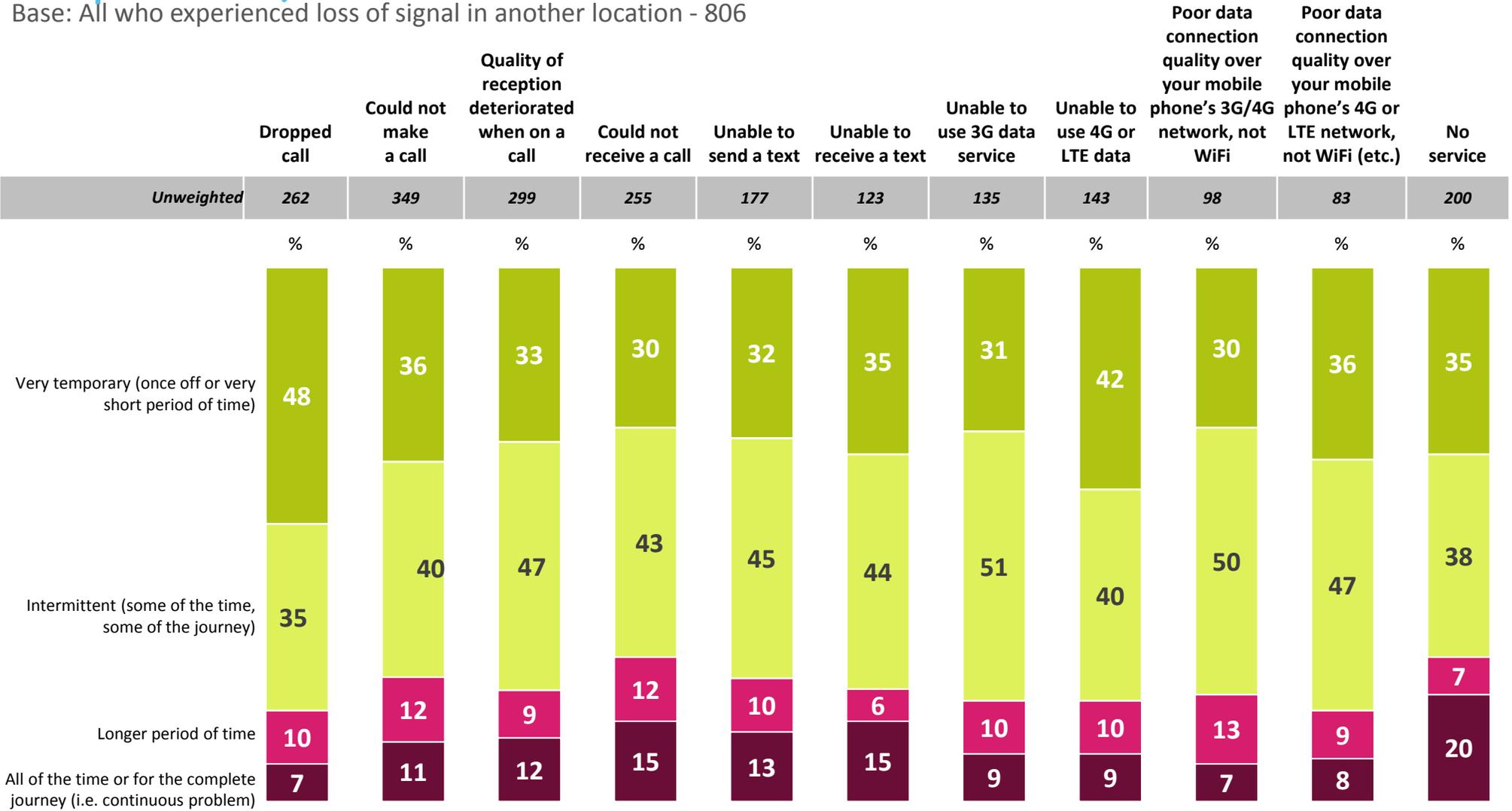
Base: All who experienced loss of signal around the outside of my home - 652



*Caution small base

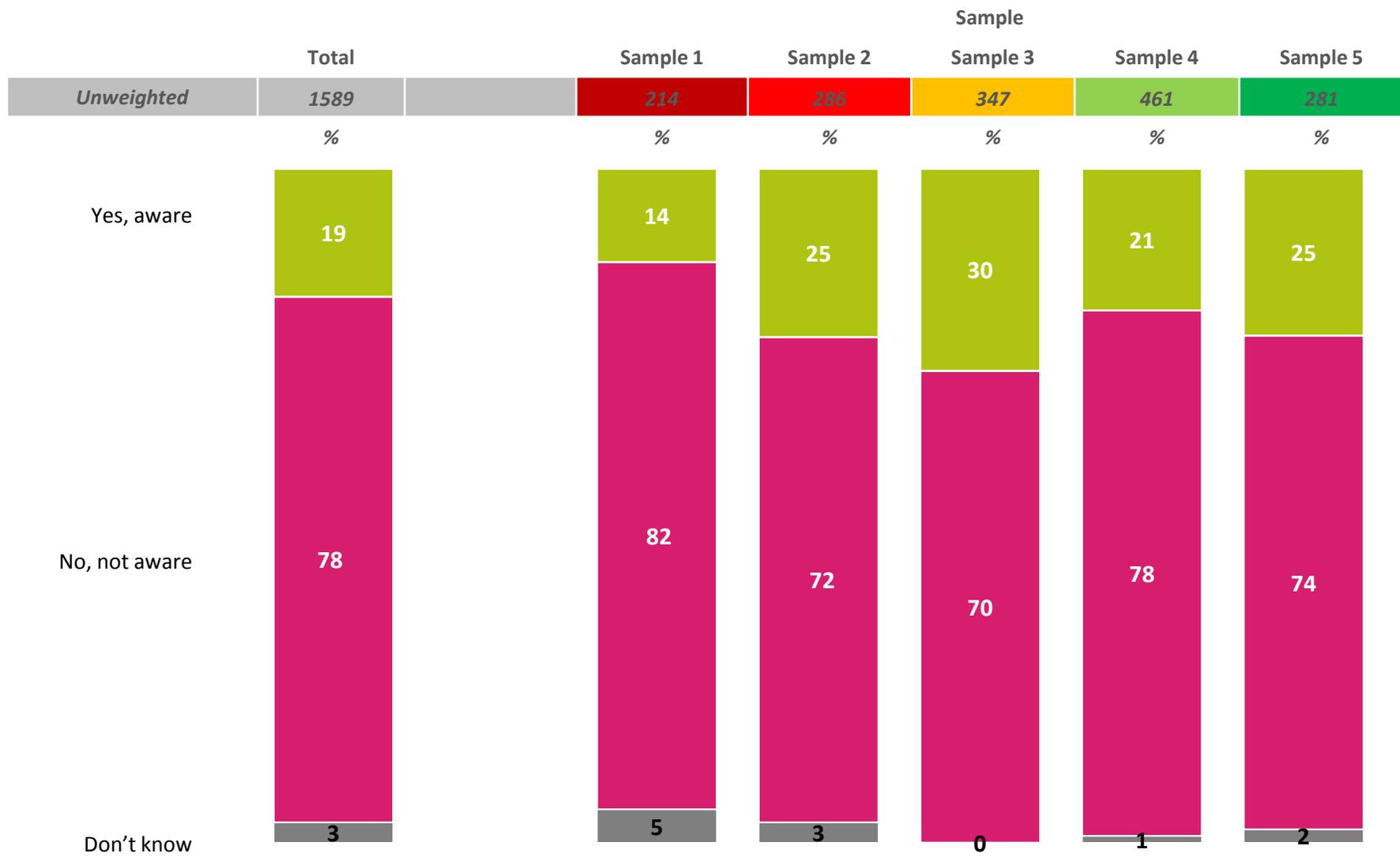
Length of time problem experienced for: Loss of signal in another location (for work/school/college/recreation/visiting family/friends etc.) or when travelling (in a car or any form of public transportation)

Base: All who experienced loss of signal in another location - 806



Awareness of a mobile phone repeater x Samples

Base: All have mobile & experienced coverage issues 1589



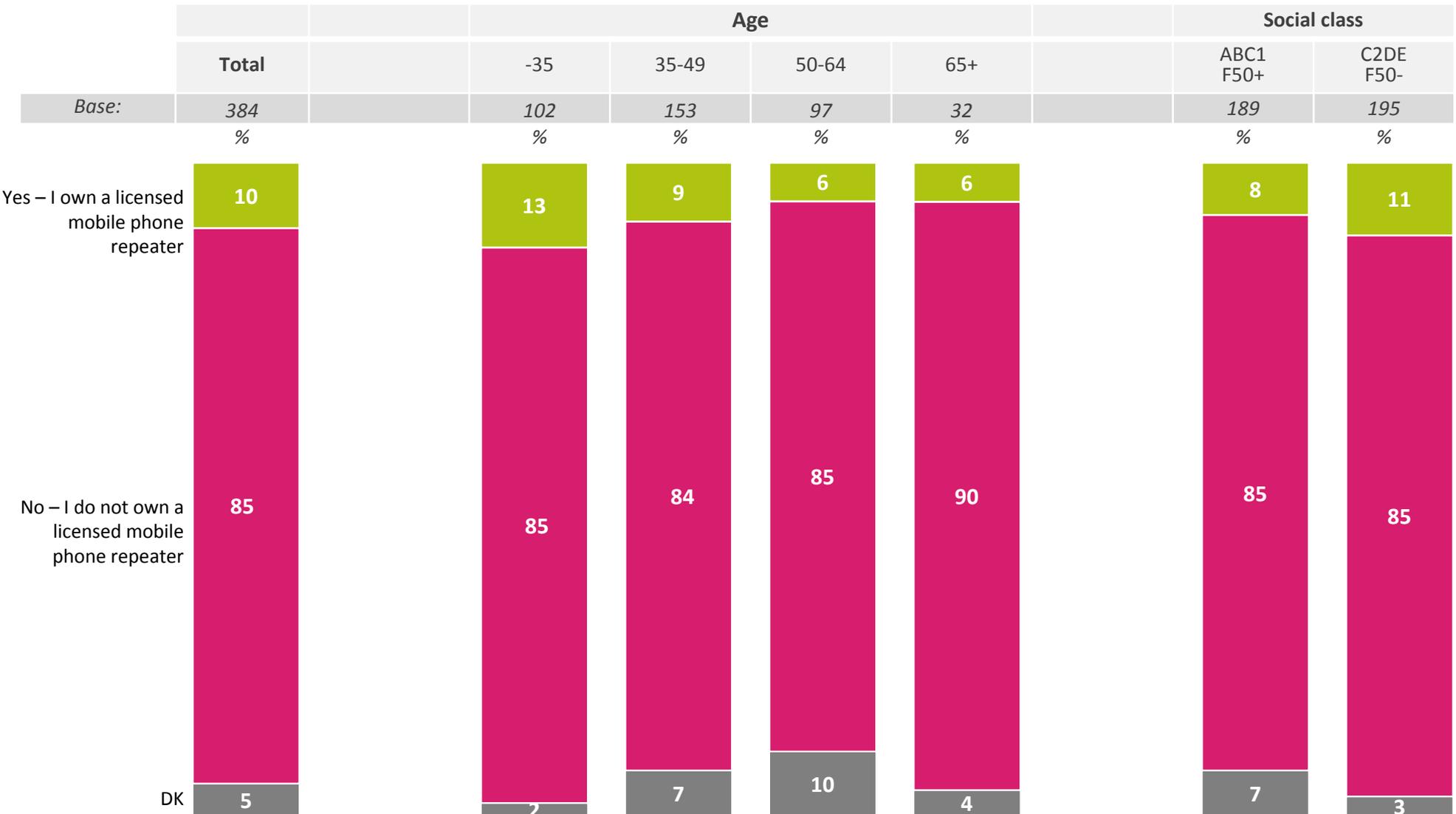
Own a mobile phone repeater x Samples (2019)

Base: All have mobile & have heard of a mobile phone repeater 384



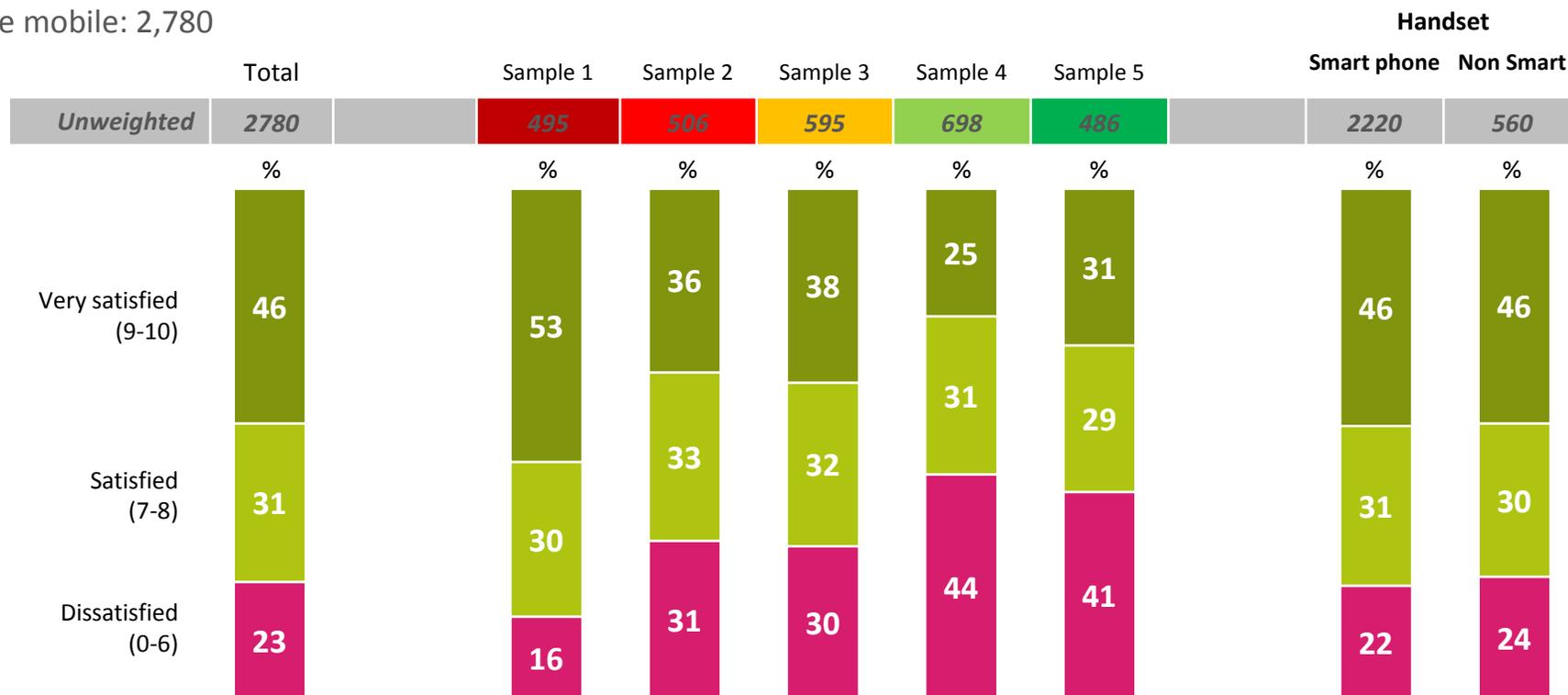
Own a mobile phone repeater x Demographics (2019)

Base: All have mobile & have heard of a mobile phone repeater 384



Satisfaction with mobile phone network's coverage where you live (i.e. at home)

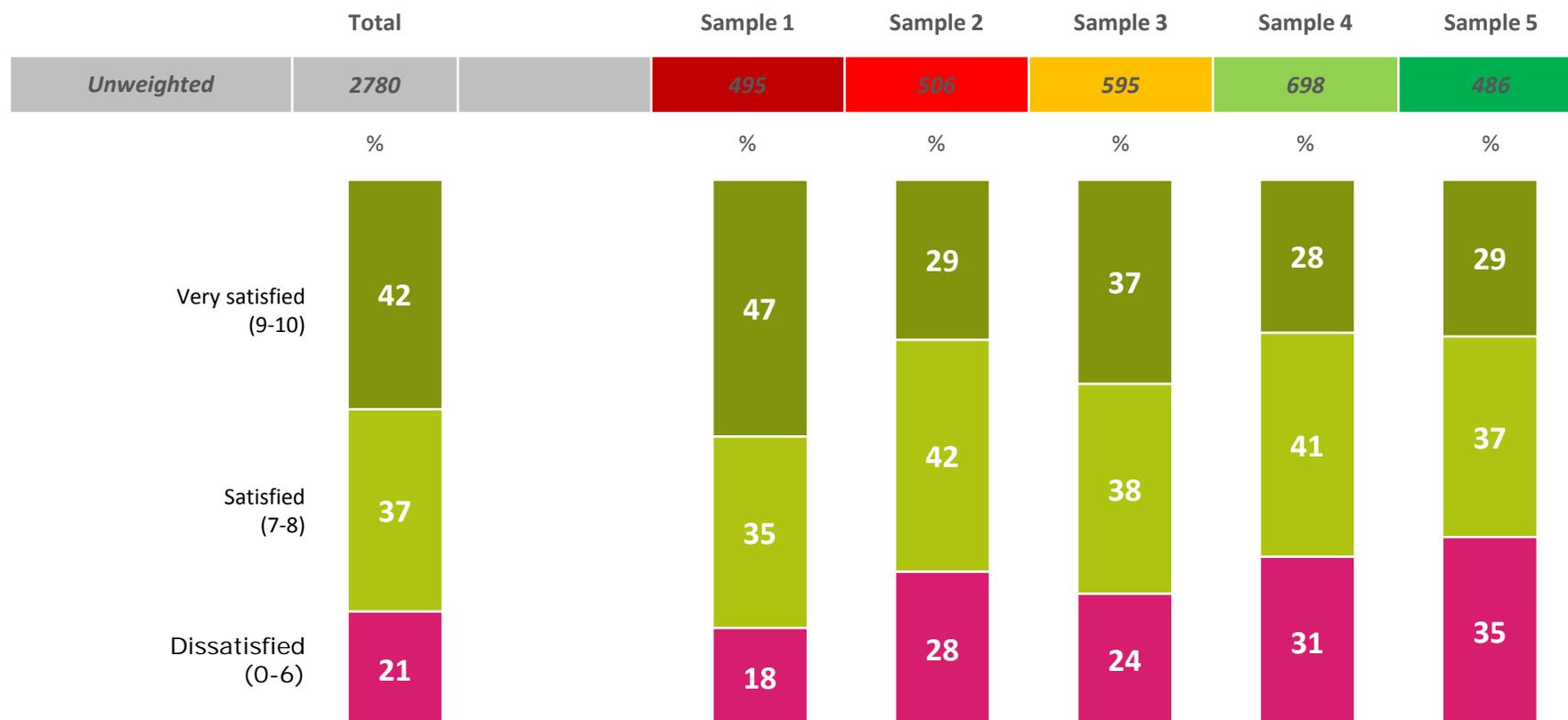
Base: All have mobile: 2,780



Mean 2019	7.55	7.99	7.13	6.93	6.08	6.34	7.56	7.53
Mean 2017	7.60	7.93	7.43	6.70	7.10	6.76		
Median 2019	8.00	9.00	8.00	8.00	7.00	7.00	8.00	8.00
Median 2017	8.00	9.00	8.00	7.00	8.00	7.00		
Standard deviation 2019	2.40	2.10	2.46	2.67	2.83	2.88	2.41	2.34
Standard deviation 2017	2.35	2.10	2.48	2.72	2.62	2.59		

Satisfaction with mobile phone network's coverage in other areas you visit/travel

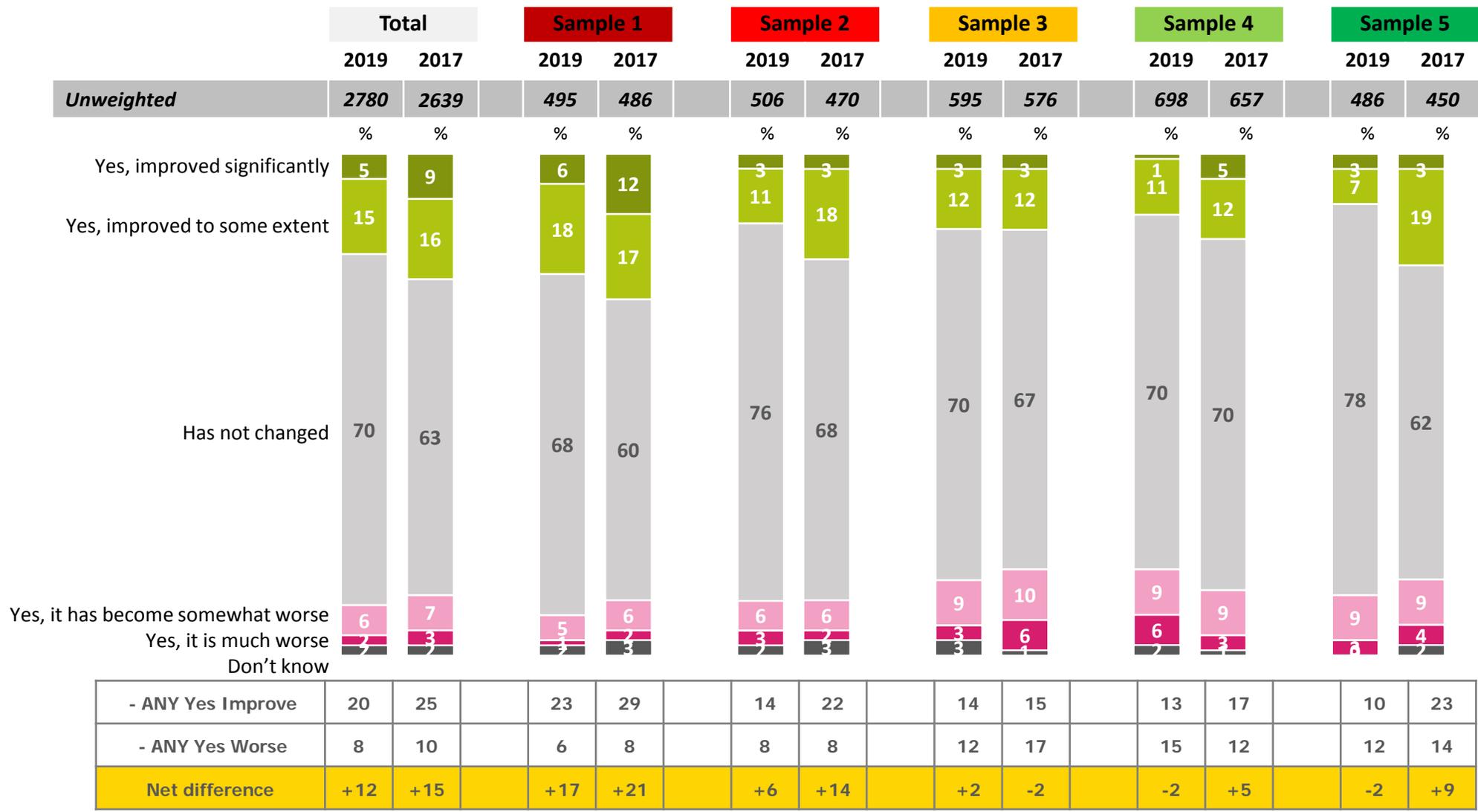
Base: All have mobile:



Mean 2019	7.66	7.91	7.13	7.42	6.96	6.83
Mean 2017	7.92	8.11	7.99	7.37	7.58	6.85
Median 2019	8.00	8.00	7.00	8.00	7.00	7.00
Median 2017	8.00	9.00	8.00	8.00	8.00	7.00
Standard deviation 2019	1.97	1.82	2.11	2.06	2.21	2.31
Standard deviation 2017	1.94	1.81	1.85	2.16	2.12	2.34

Mobile phone coverage experience over the last year x samples

Base: All have mobile : 2780



Mobile phone coverage experience over the last year among those experienced calls/text vs data issues

Base: All have mobile :

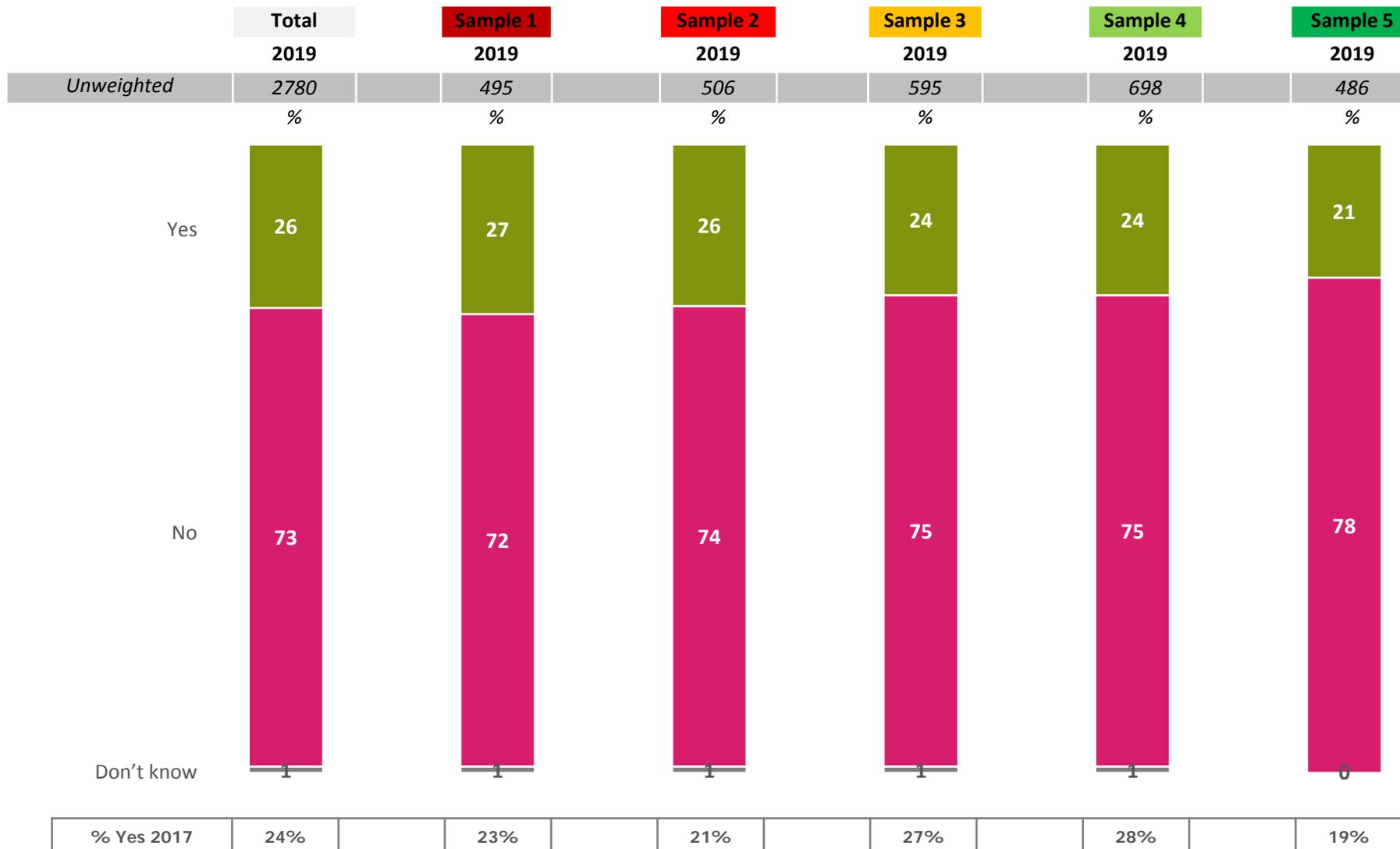




Levels of switching & Mobile handset impact on network coverage/ signal

Incidence of ever changing network provider (for whatever reason) x Segments

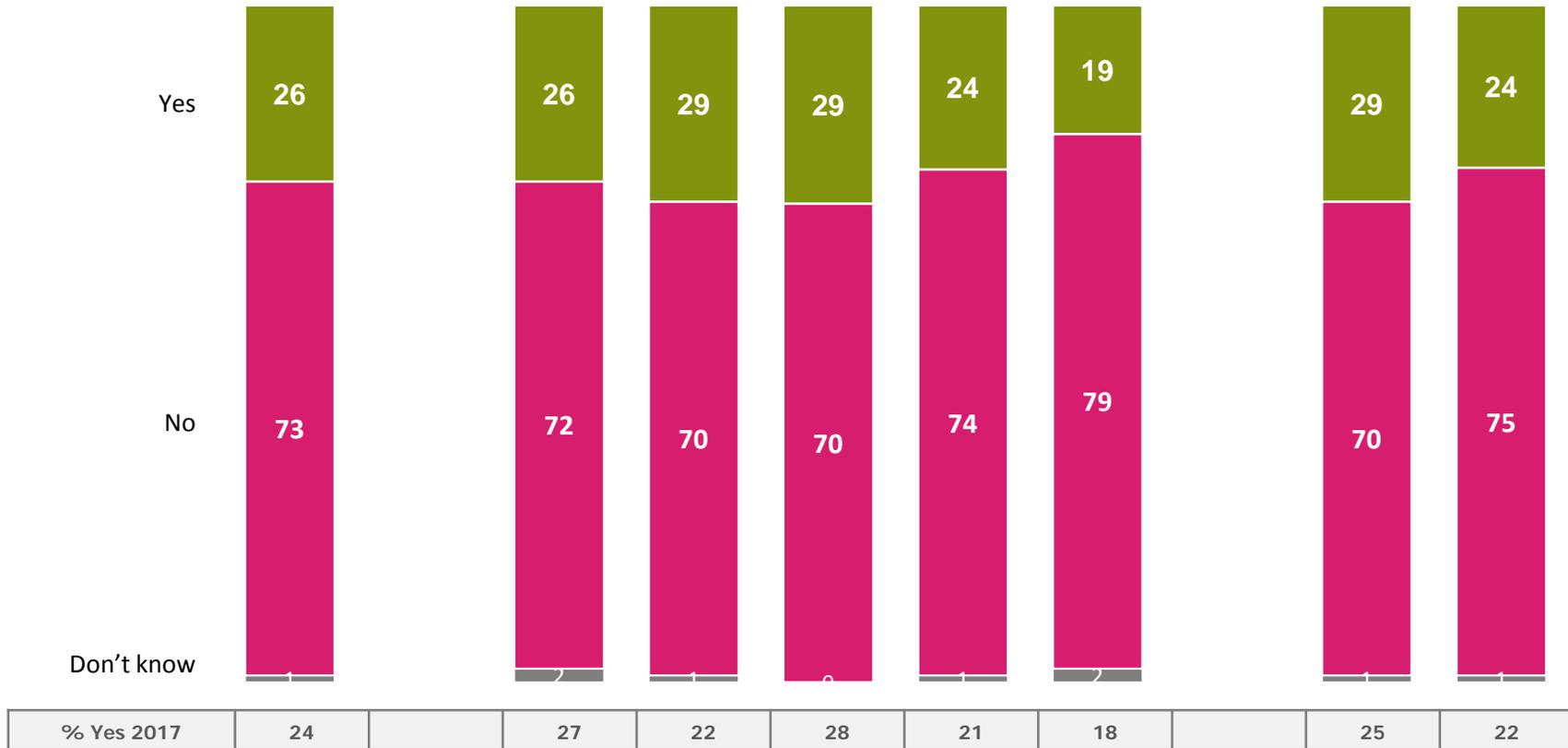
Base: All have mobile :



Incidence of ever changing network provider (for whatever reason)

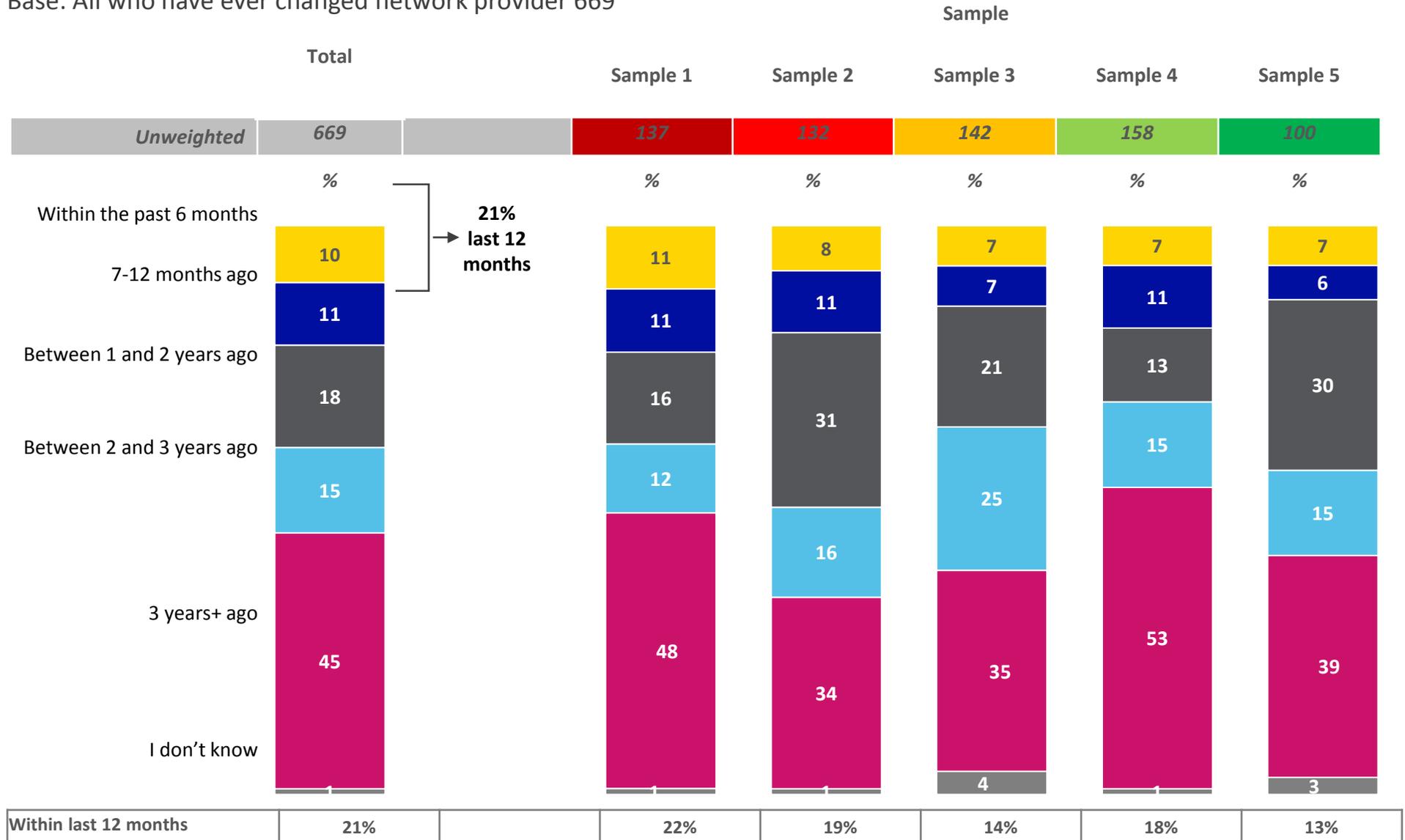
Base: All have mobile :

	Total	Age					Social Class	
		18-24	25-34	35-49	50-64	65+	ABC1 F50+	C2DE F50-
<i>Unweighted</i>	2780	236	387	864	712	581	1099	1681
	%	%	%	%	%	%	%	%



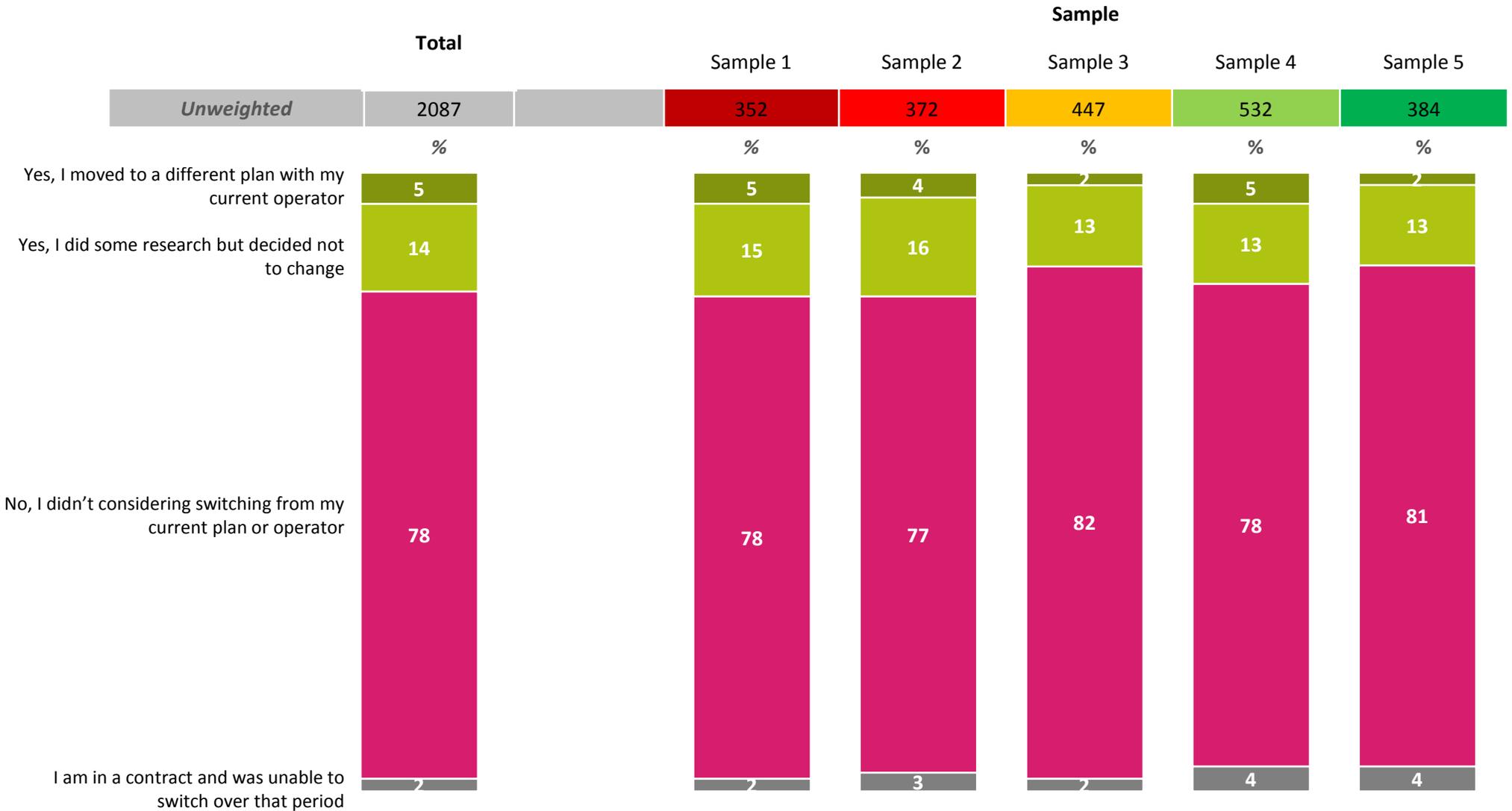
Last time you switched mobile phone operator if you have ever switched in the past

Base: All who have ever changed network provider 669



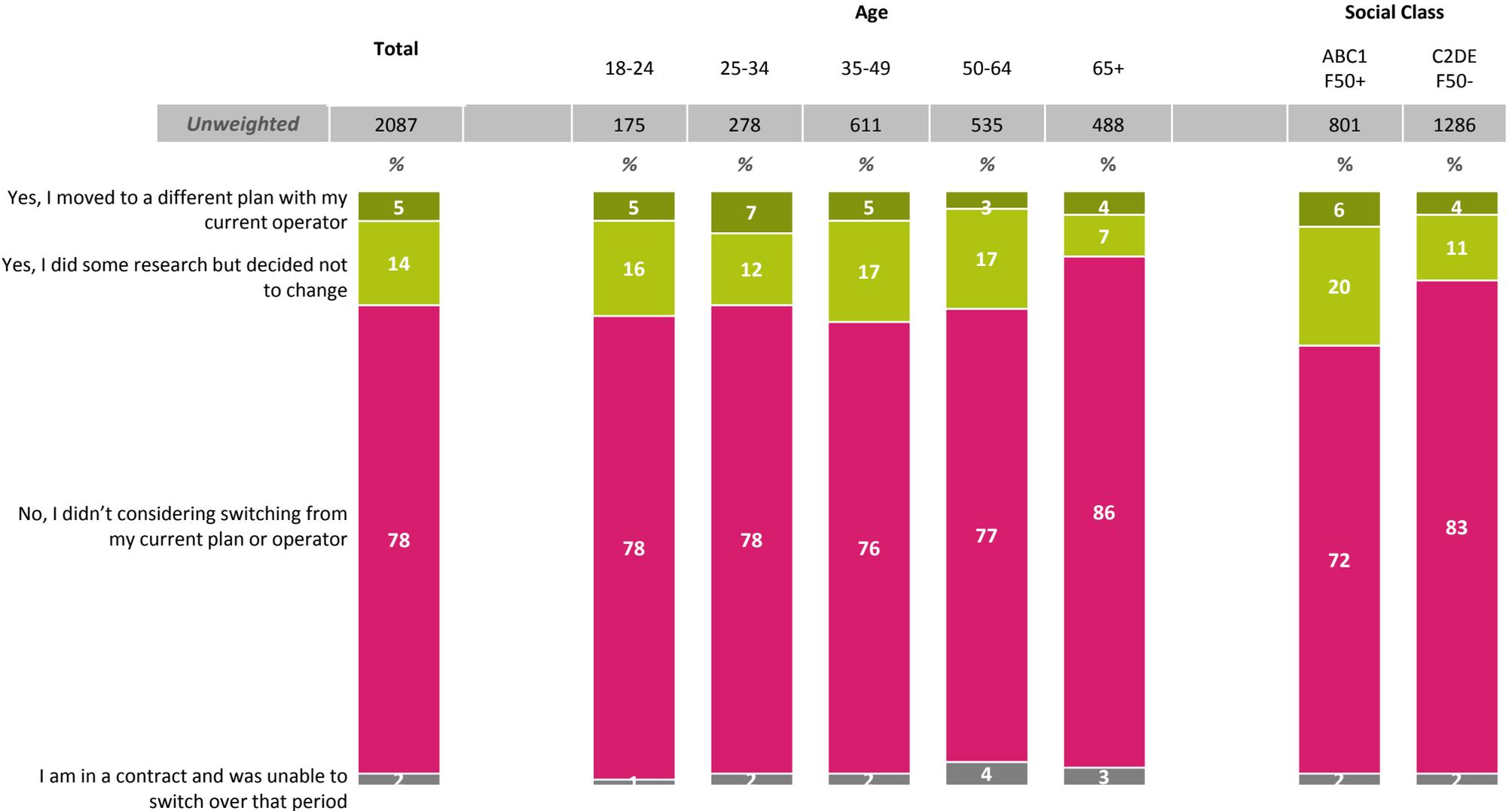
Those who have never switched, but have considered switching in past 2 years, distribution by samples

Base: All never switched mobile provider n=2,087



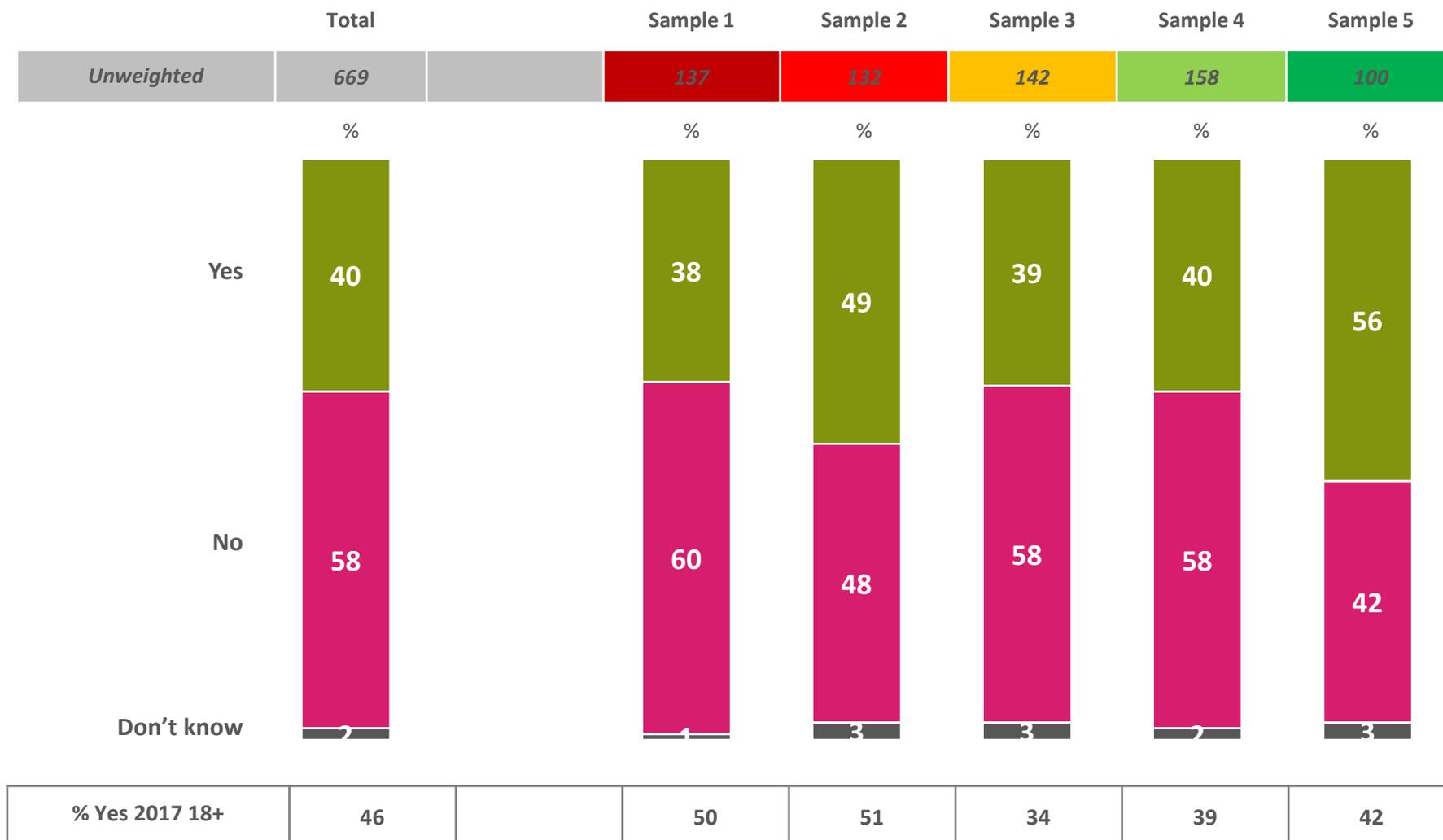
Those who have never switched, but have considered switching in past 2 years, distribution by demographics

Base: All never switched mobile provider n=2,087



Incidence of keeping mobile phone handset when you switched x Segments

Base: All who have ever changed network provider 669



Incidence of changing your network provider but keeping the same mobile phone, improving mobile coverage experience

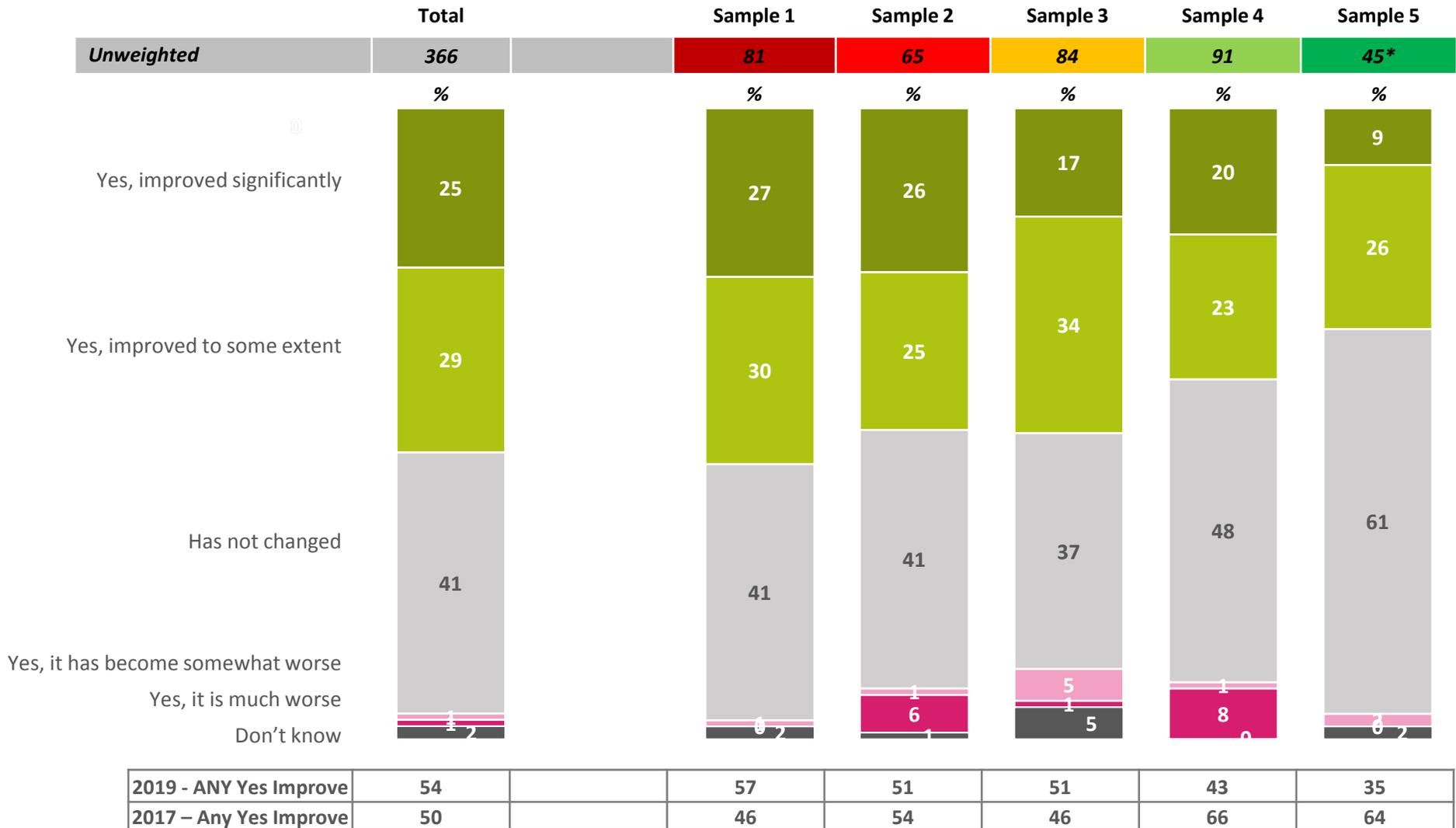
Base: All changed network provider but kept mobile:



*Caution small base

Incidence of changing your network provider and changing your mobile phone, improving mobile coverage/signal experience x samples

Base: All changed network provider and mobile handset:



*Caution small base

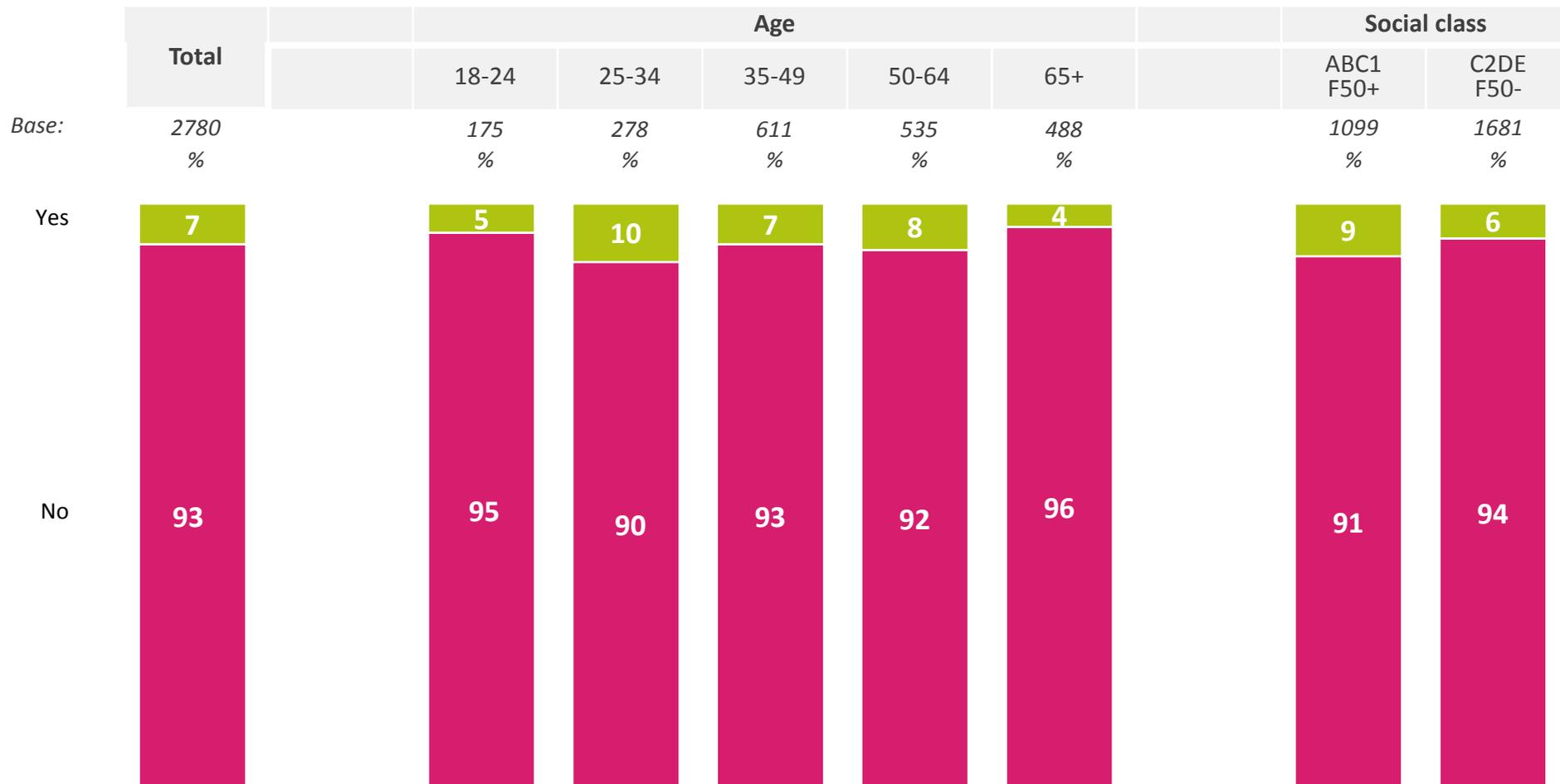
Incidence of changing handset due to mobile phone coverage or signal problems x Segments

Base: All have mobile :



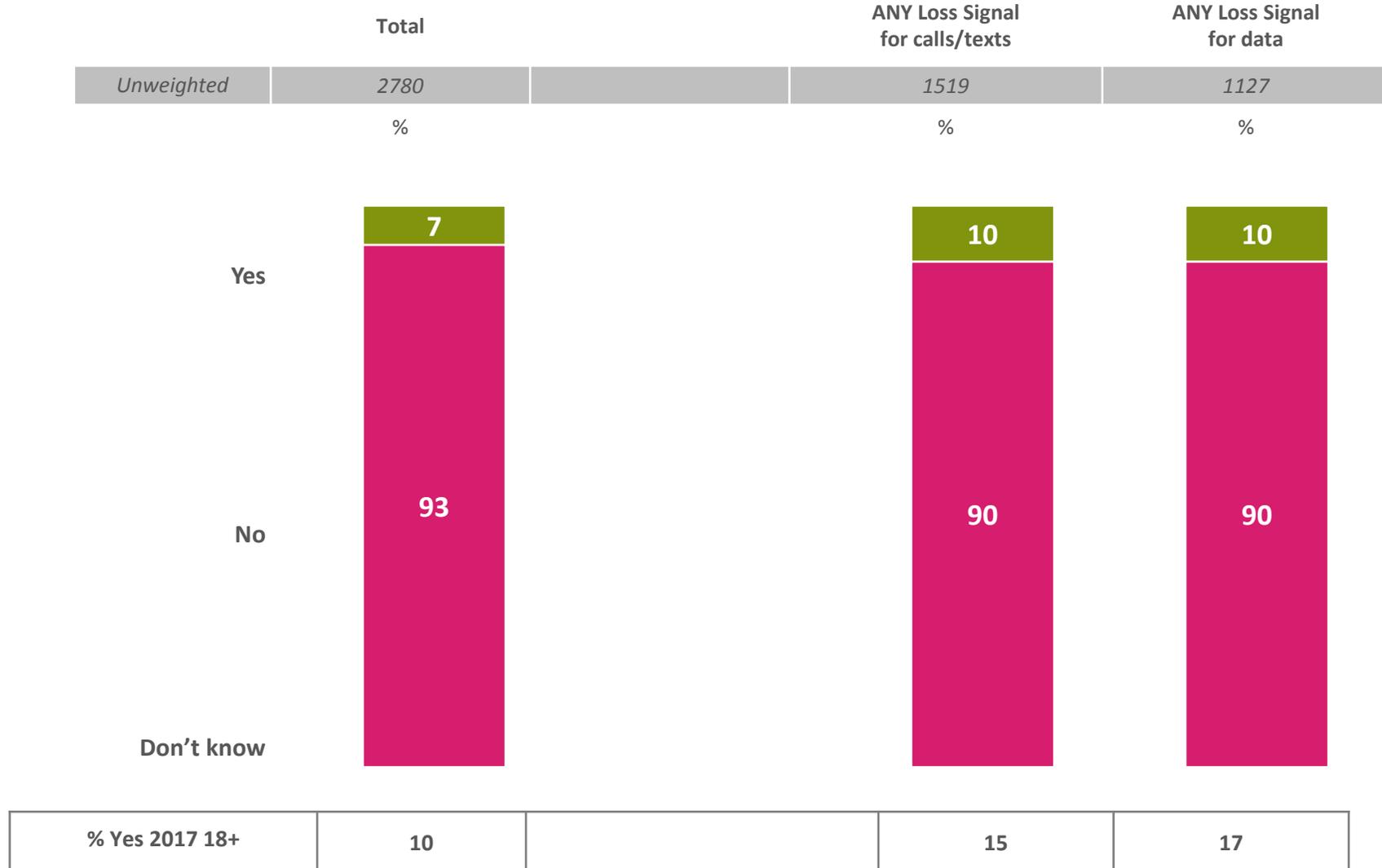
Ever changed handset due to coverage/signal problems x demographics (2019)

Base: All have mobile 2,780



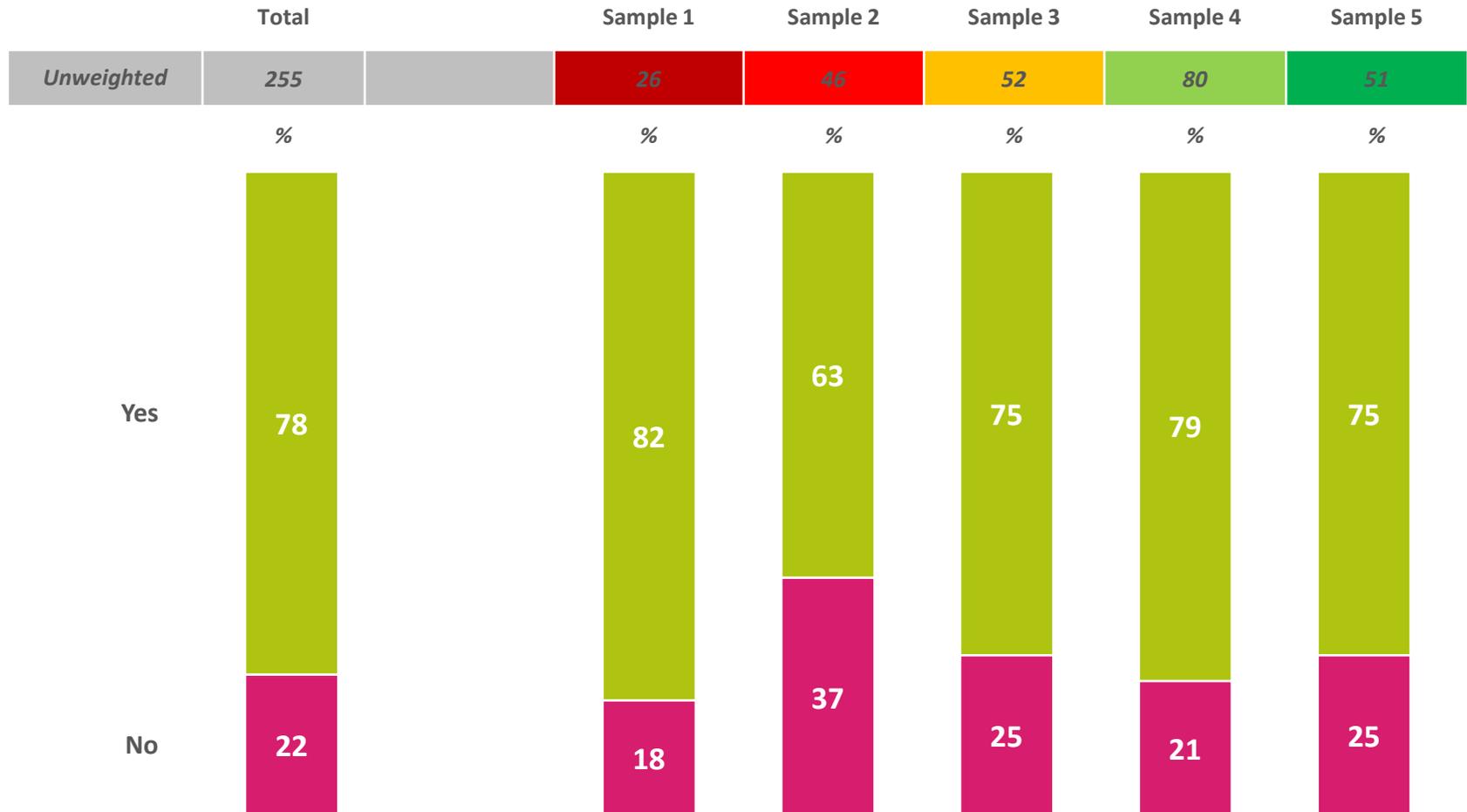
Incidence of changing handset due to mobile phone coverage or signal: those with call/text vs data issues

Base: All have mobile :



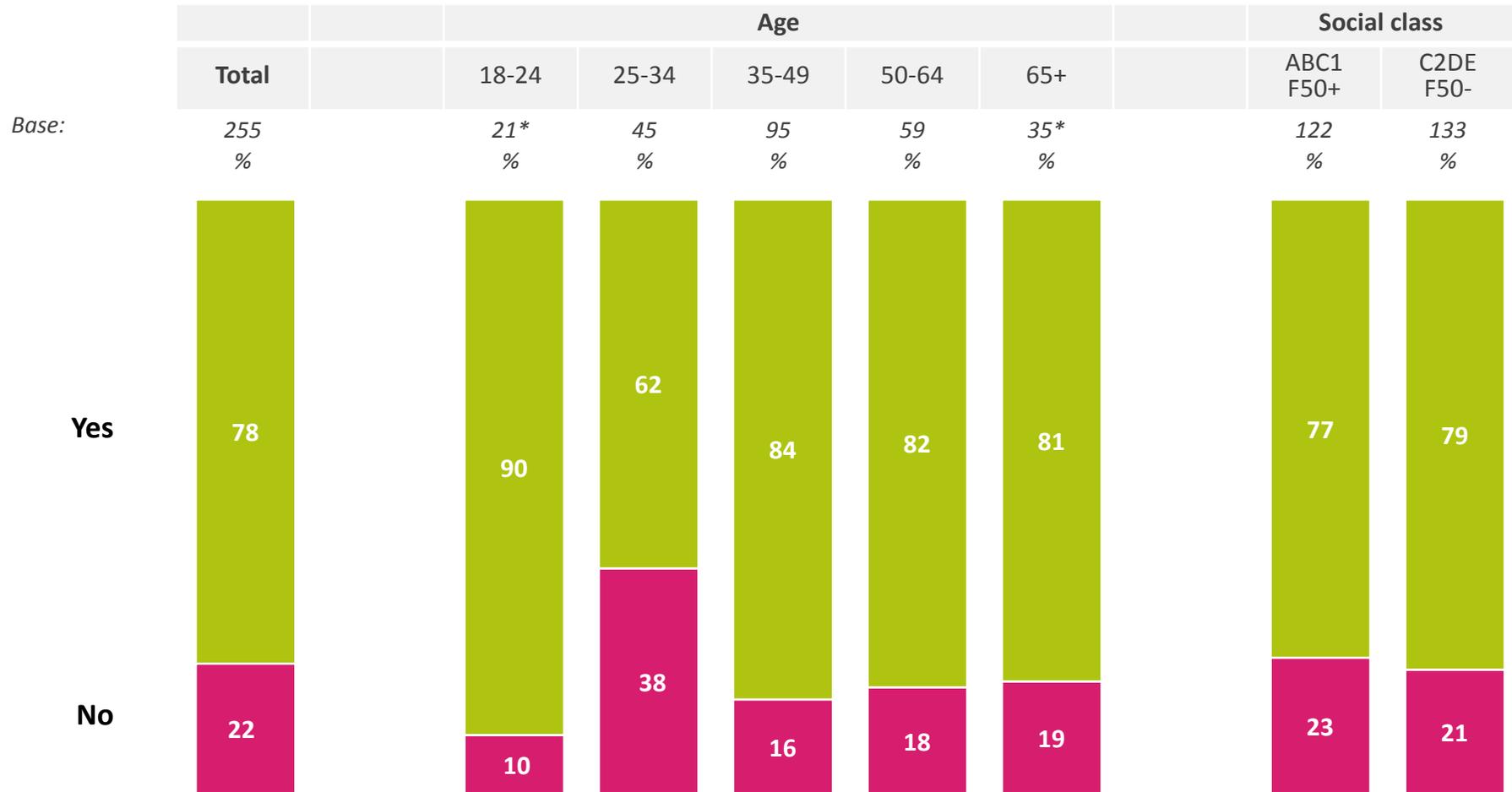
Incidence of staying with same operator upon changing mobile handset due to coverage or signal problems x Samples (2019)

Base: All have mobile and changed handset due to coverage/signal problems



Incidence of staying with same operator upon changing mobile handset due to coverage or signal problems x demographics (2019)

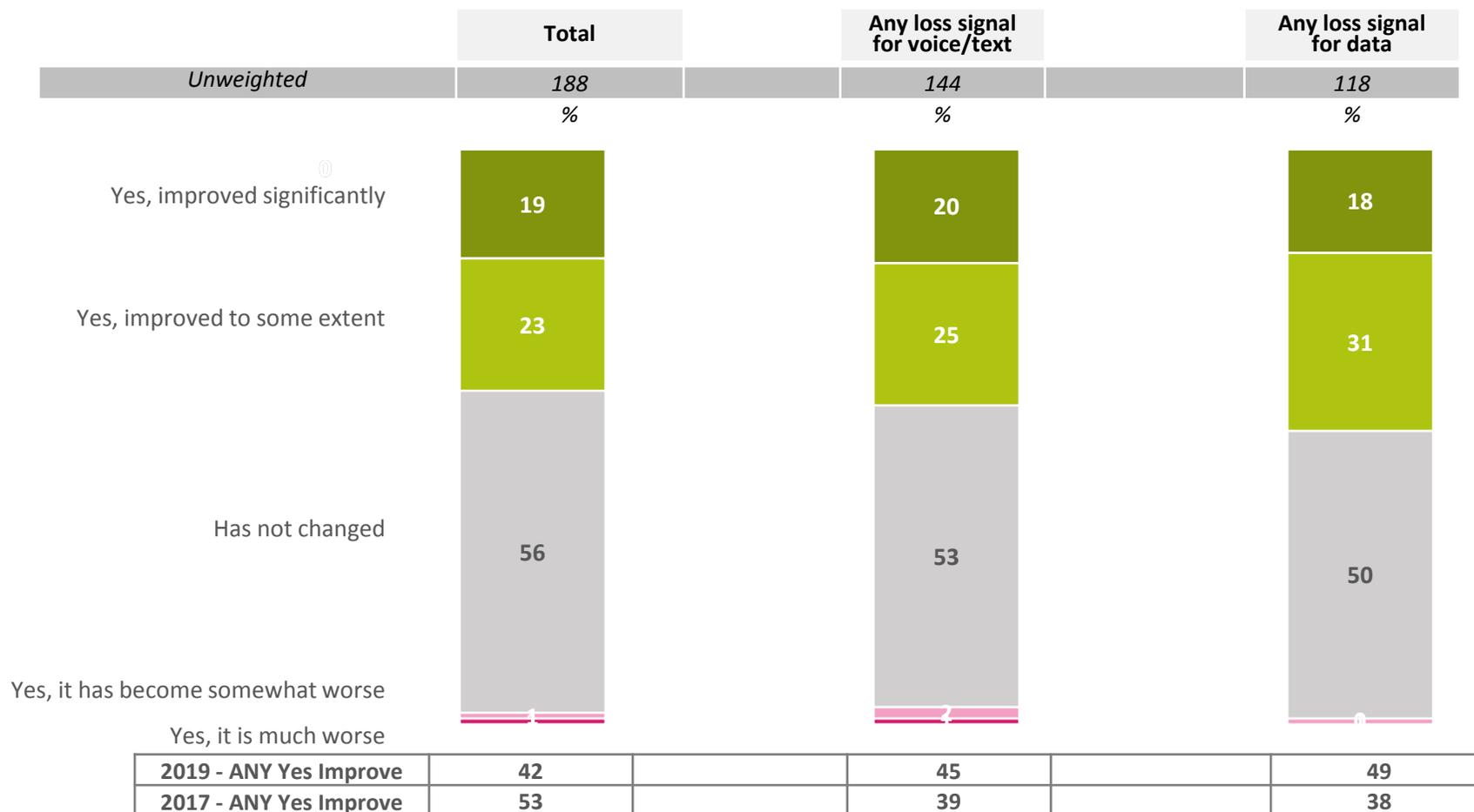
Base: All have mobile and changed handset due to coverage/signal problems



*Caution small base

Incidence of handset change improving mobile coverage experience

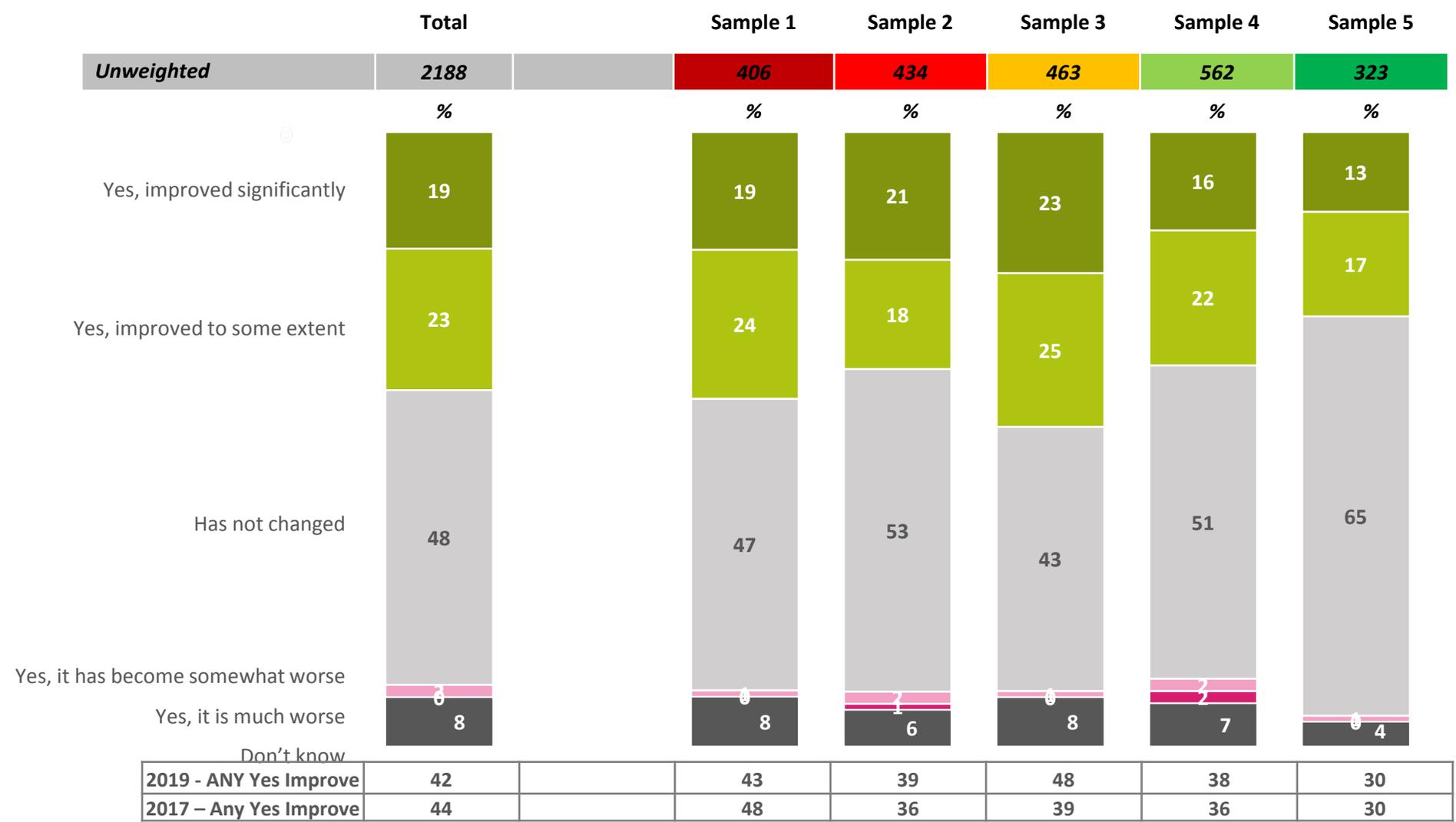
Base: All changed mobile phone :



*Caution small base.

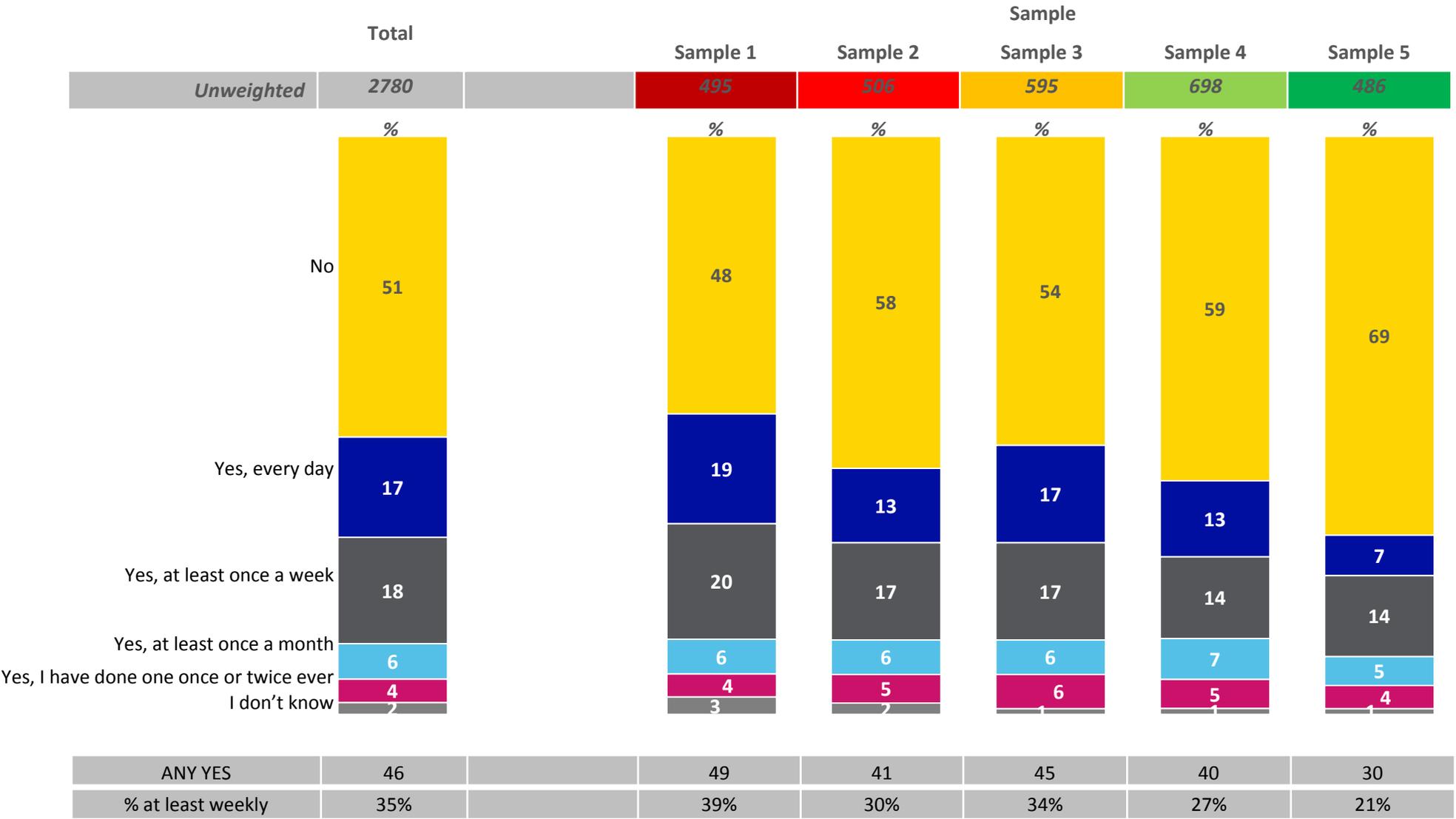
Impact of handset WiFi service on internet access experience x Samples

Base: All with broadband and smartphone: 2188



Incidence of ever making calls over Wi-fi x samples

Base: All who have mobile 2780



Incidence of wifi improving voice call experience x samples

Base: All who make calls over wifi

