



ComReg Consumer ICT Survey

April 2013



Commission for
Communications Regulation

Background & Objectives



- ComReg wish to conduct a consumer ICT Survey in order to establish access to and satisfaction with household telecommunications.
- The specific objectives of the research are to access :
 - Ownership, Provider, Satisfaction, Switching within 4 key markets



Landline



Mobile Phone



Mobile Broadband



Fixed Broadband

+ TV

Methodology

- 1,000 interviews were conducted by phone between 12th-27th February among a nationally representative sample of telecoms decision makers.
- A boost sample of 500 interviews was conducted in Urban areas of Dublin, Cork, Limerick & Galway – all city data shown on merged sample of 904.
- A modular system was adopted to ensure any respondent would not answer any more than 3 service sections. Alternative selection of mobile and fixed broadband

Note on Methodology

- The survey is representative of those already holding telecommunications services.
- Mobile Only households were weighted to 30% of the sample



Presentation Structure



1

Sample Profile

2

Service Ownership

3

Landline

4

Mobile Phone

5

Mobile Broadband

6

Fixed Broadband

7

Bundles & Spend

8

ComReg Awareness & Complaints

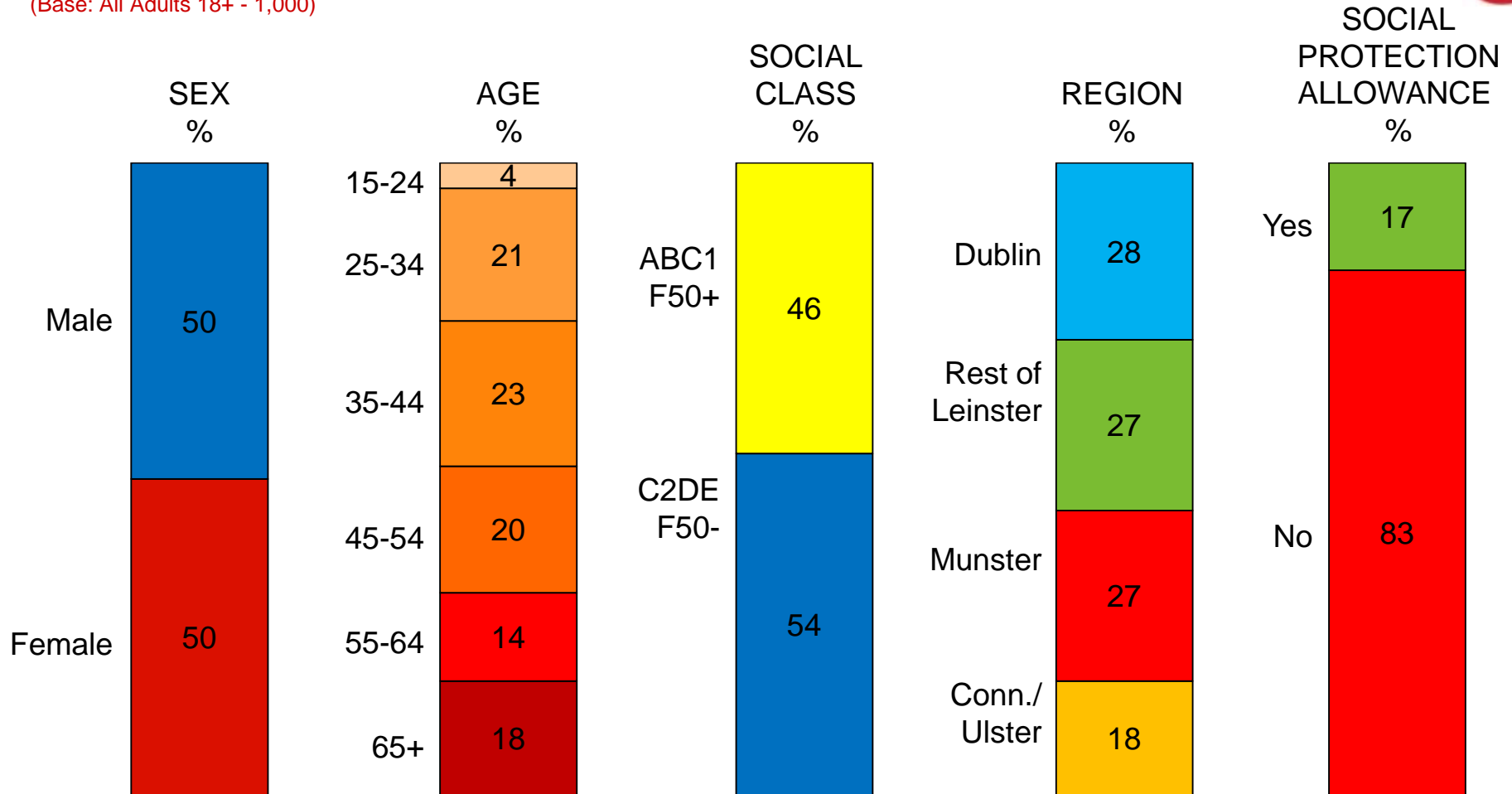


Sample Profile

Sample Profile – National Profile Of Telecommunications Decision Makers



(Base: All Adults 18+ - 1,000)



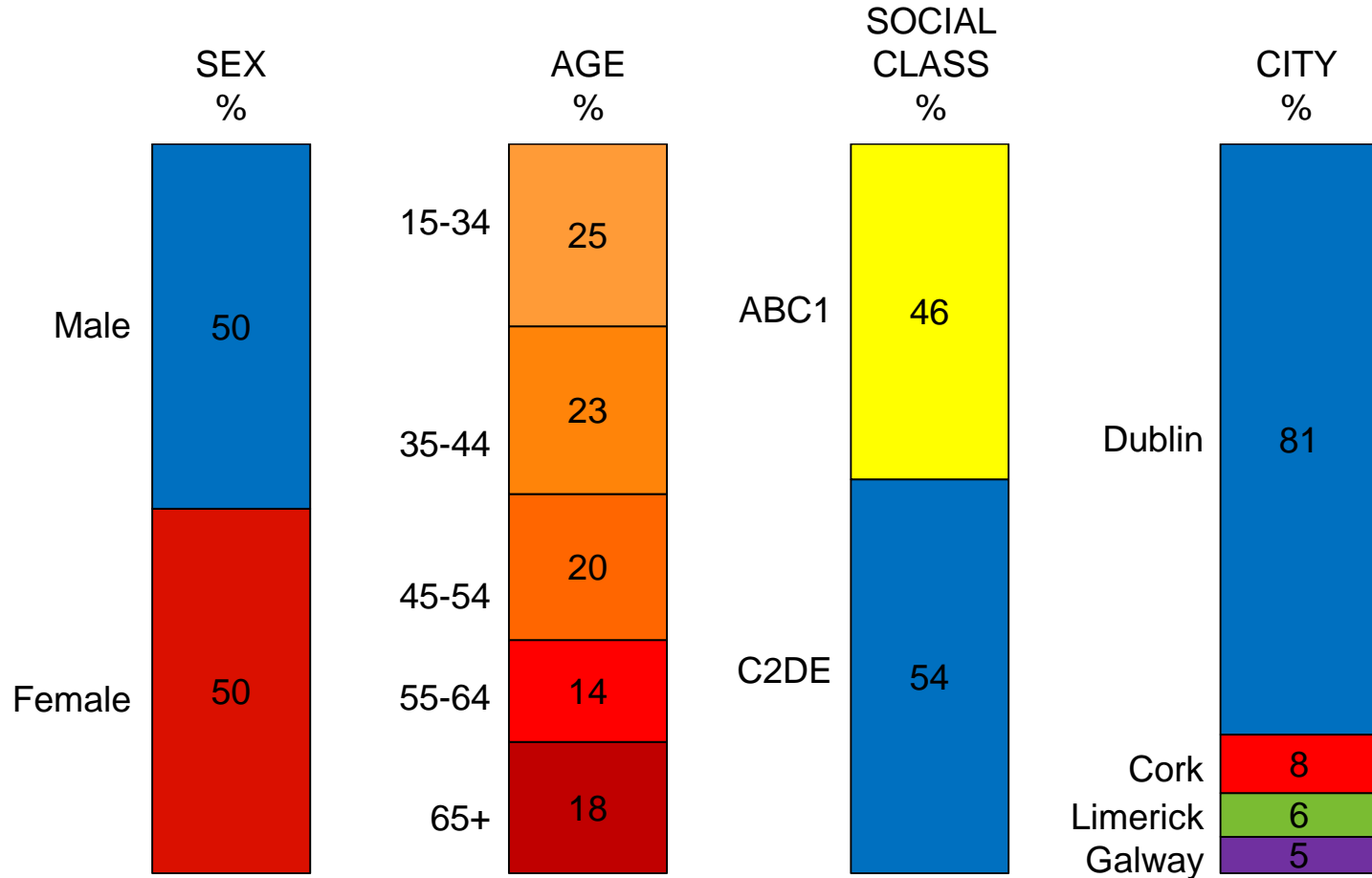
Profile similar to national population profile with the exception of lower share in 15-24 year old's



Sample Profile – Boost Sample



(Base: All Adults 18+ - 1,000, City 904)




The city sample is weighted by city population size



National Segmentation – Lifestage



(Base: All Adults 18+ - 1,000)




Young & Free
18-34, No kids
No mortgage





New Families
Kids, Oldest
0-6 years




Established Families
Oldest kids
6-15 years

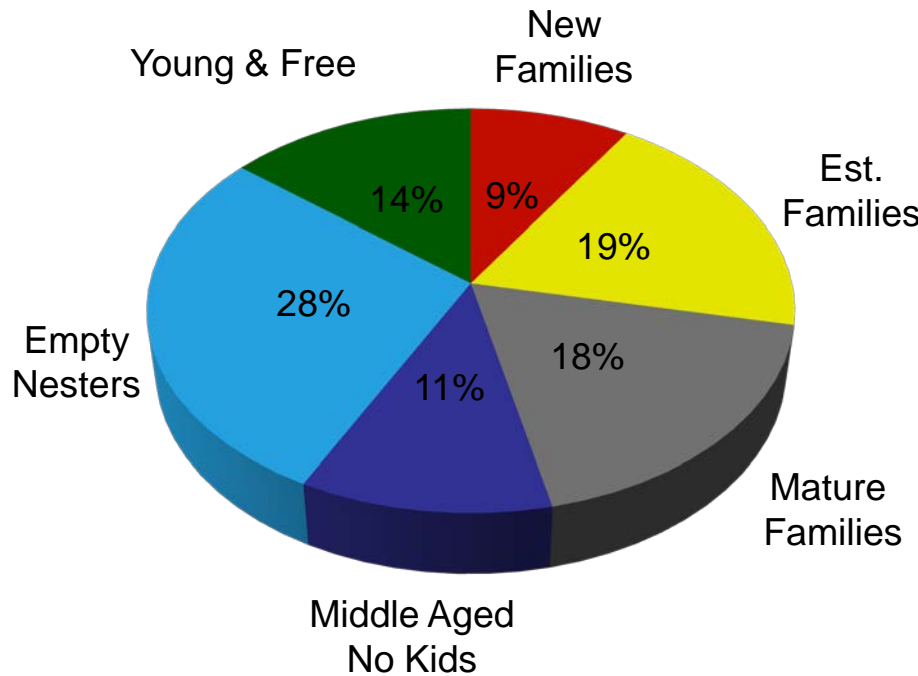
Mature Families
Oldest Child 16+

Mid Age No Kids
35-54, No Kids




Empty Nesters
55+, No Kids



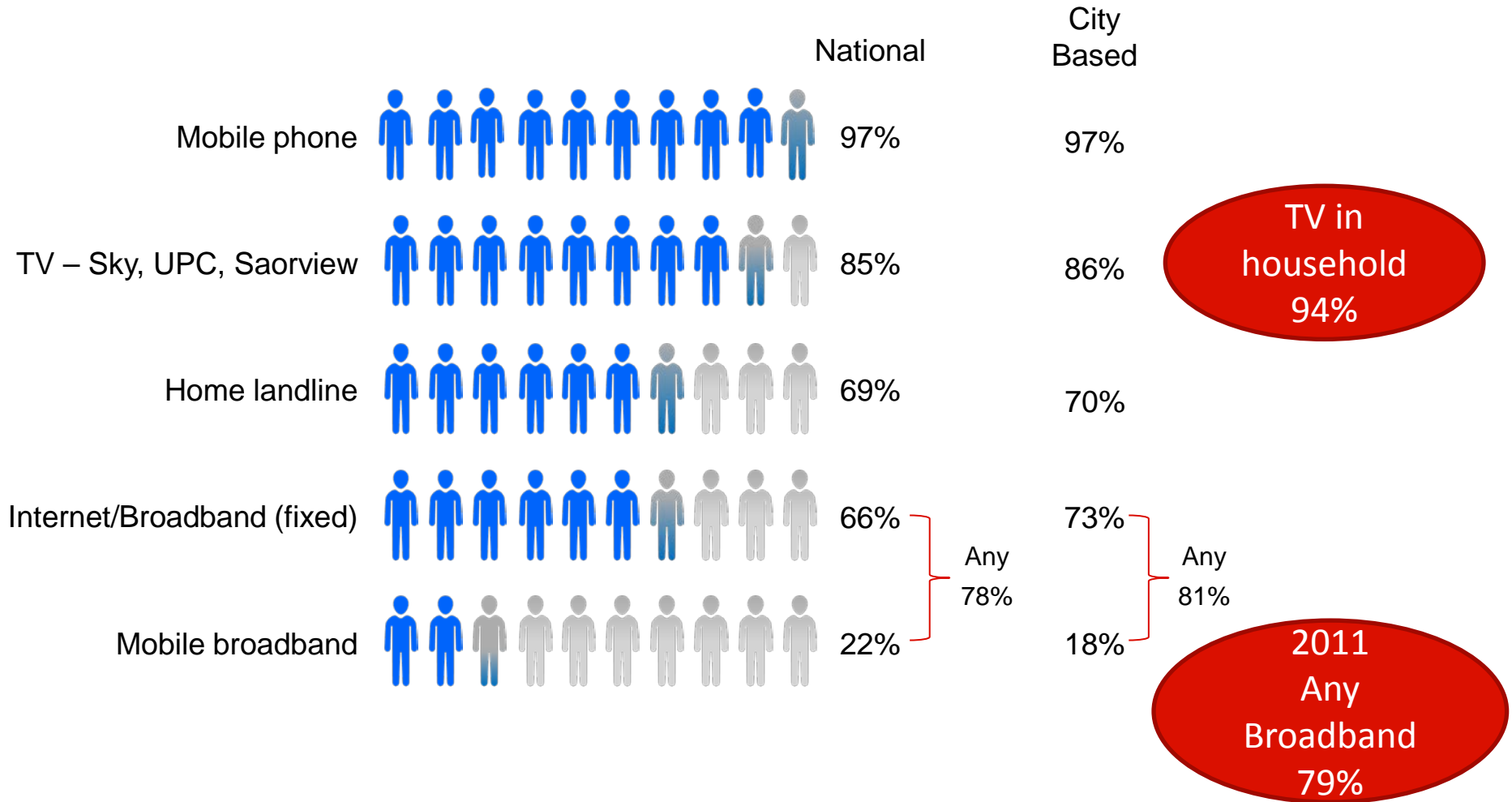
Demographic segmentation profile 6 clusters in the national population that we can analyse our results by



Service Ownership

Telecommunications Services Accessed At Home

(Base: All Adults 18+ - 1,001, City Based - 904)



Mobile Phone most common access within household followed by TV then home landline



Services Held Differ By Life Stage

(Base: All Adults 18+ - 1000)



Young & Free



New Families



Est. Families



Mature Families



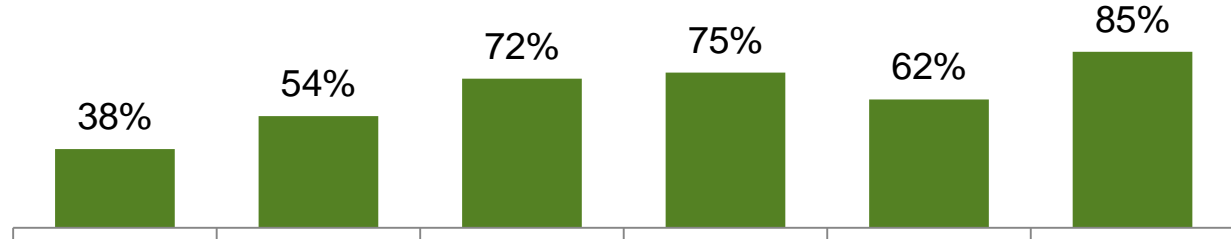
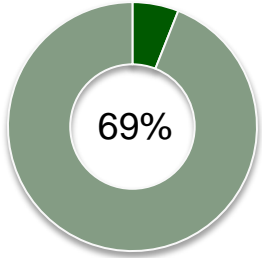
Middle Aged No Kids



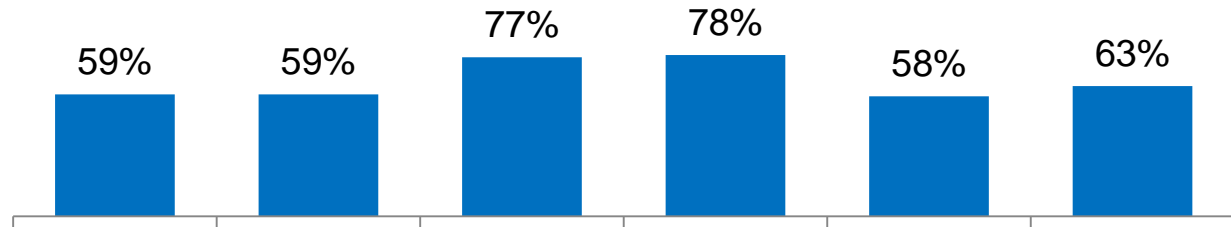
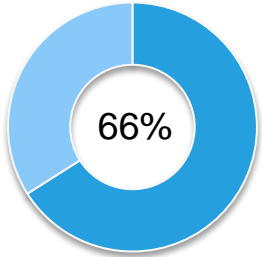
Empty Nesters



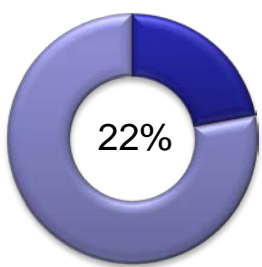
Home Landline



Fixed Broadband



Mobile Broadband



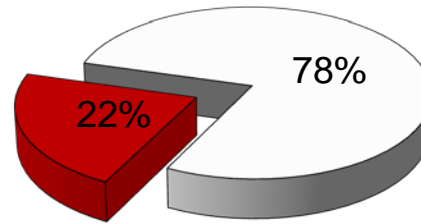
Young and Free least likely to have home landline and most likely to have mobile broadband

Reasons For Not Using Fixed/Mobile Broadband at Home



(Base: All Non Broadband Users)

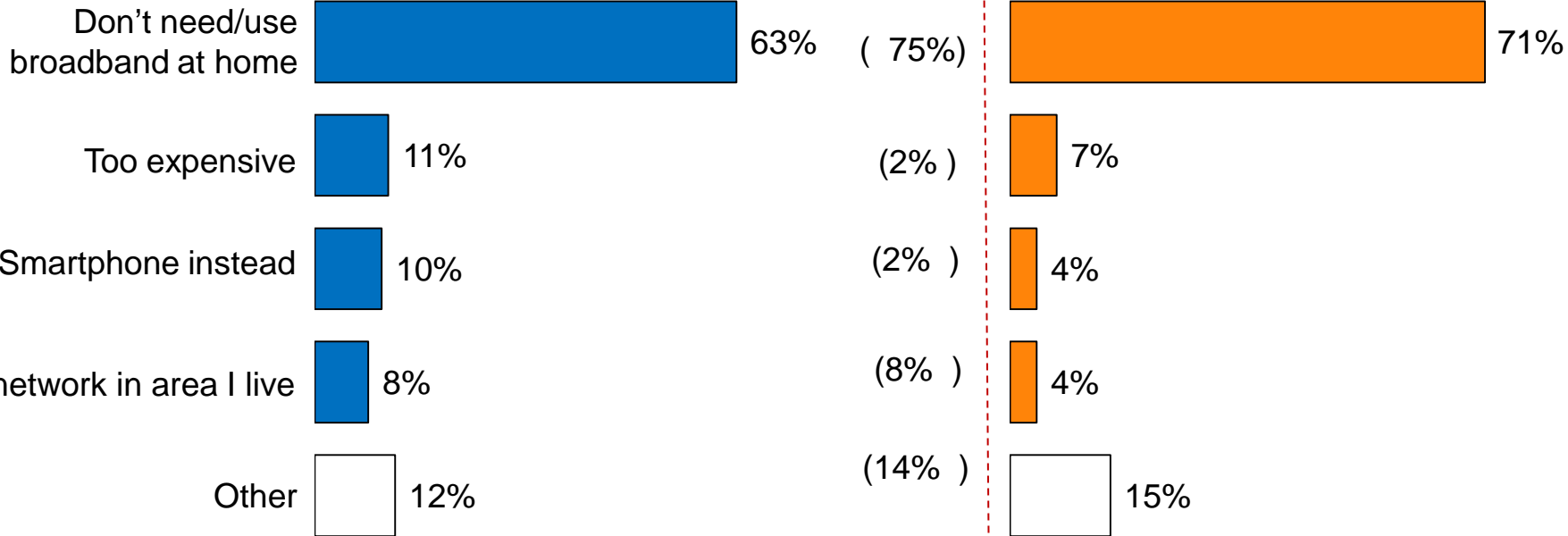
Non Users



**Nationally
(220)**

**Landline
Not In Bundle
(104)**

**City
Based
(150)**



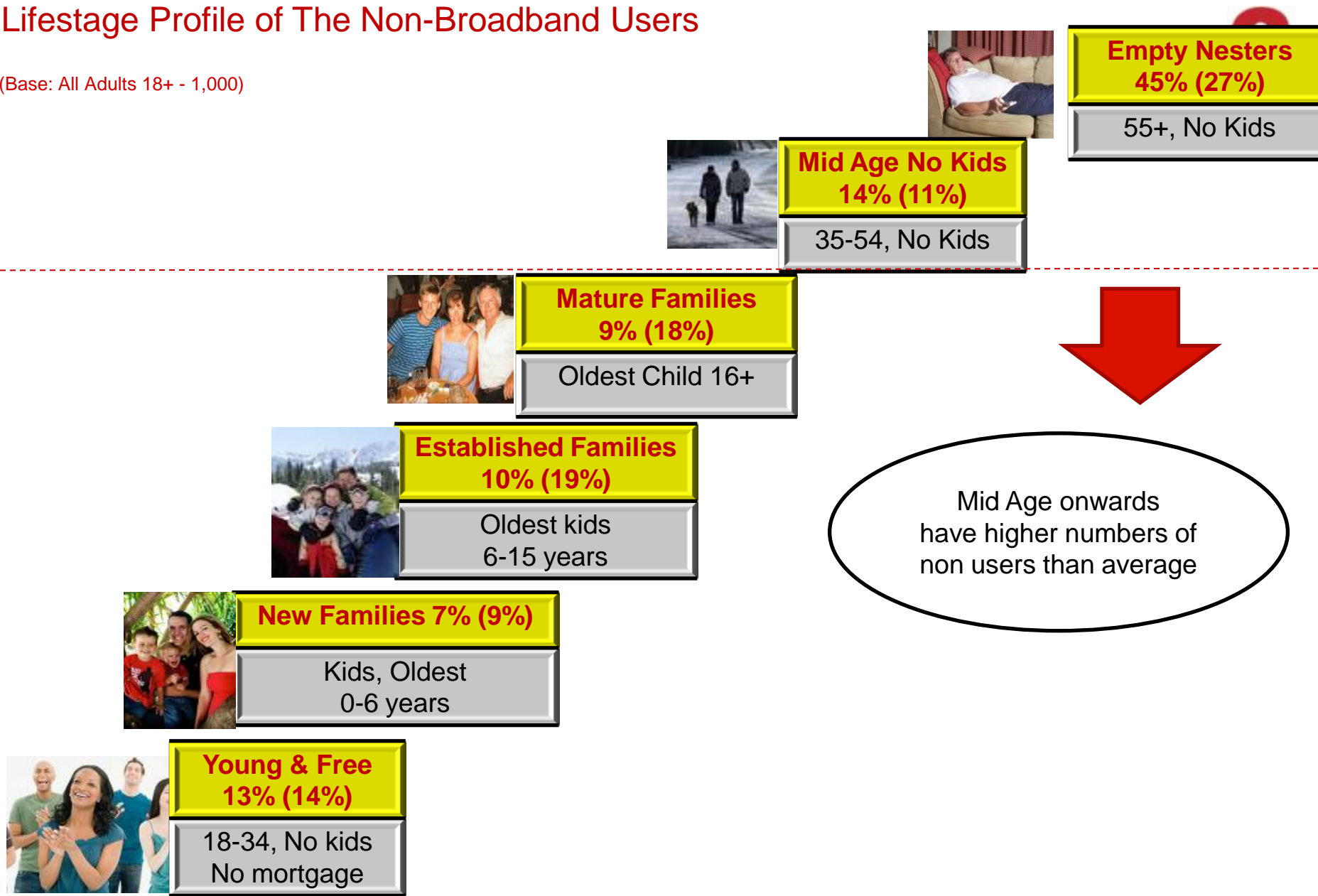
The main reason for non use of broadband is no need for service

(Q 2)



Lifestage Profile of The Non-Broadband Users

(Base: All Adults 18+ - 1,000)



Mid Age onwards have higher numbers of non users than average

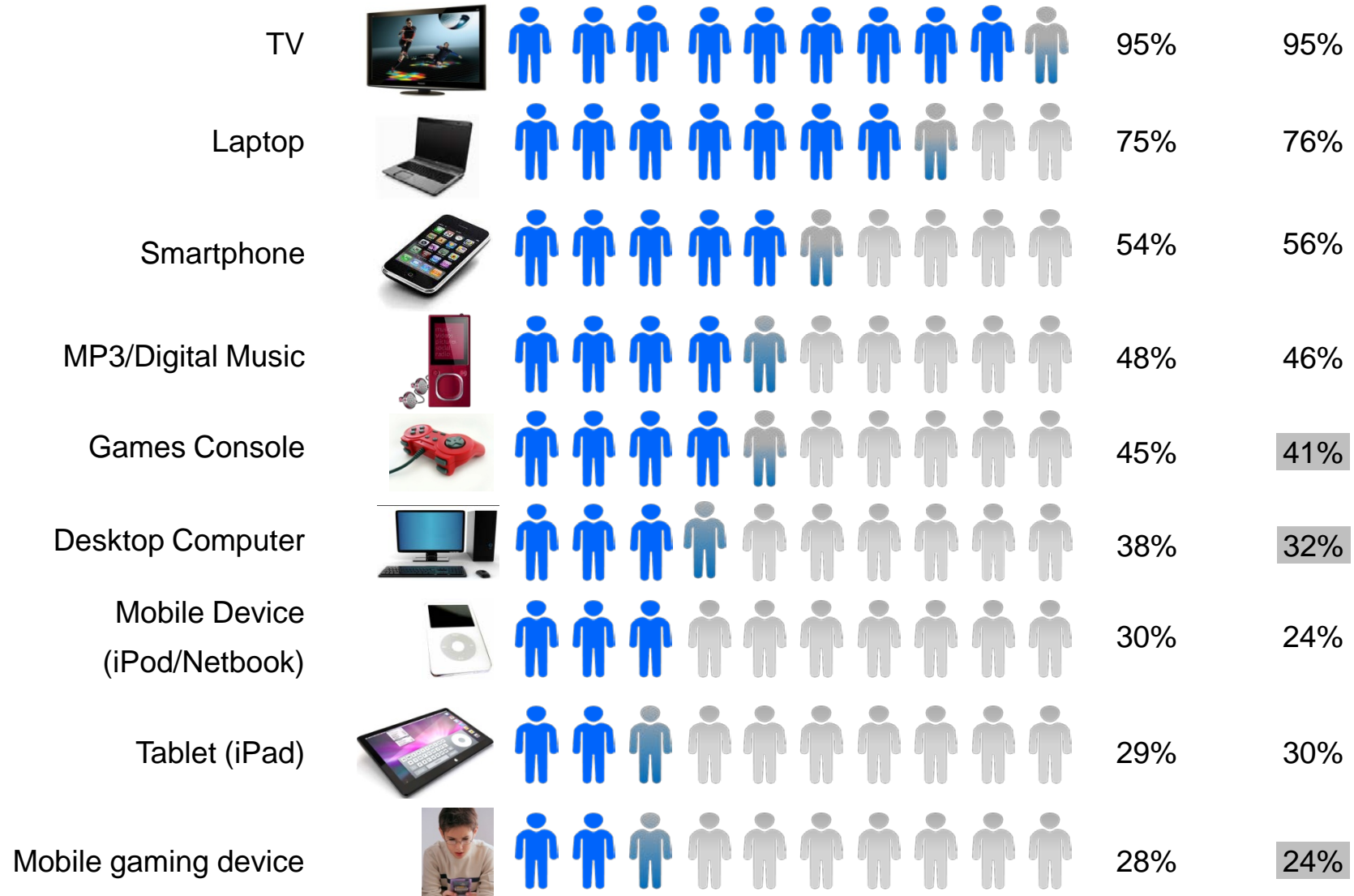
Profile of Broadband Non Users over index's from Mid Age no kids onwards

Device Ownership

(Base: All Telecommunications Decision Makers – 1,000, 904 City Based)

National

City Based



TV, Laptop & Smartphones most likely held – some devices have lower penetration in the city sample

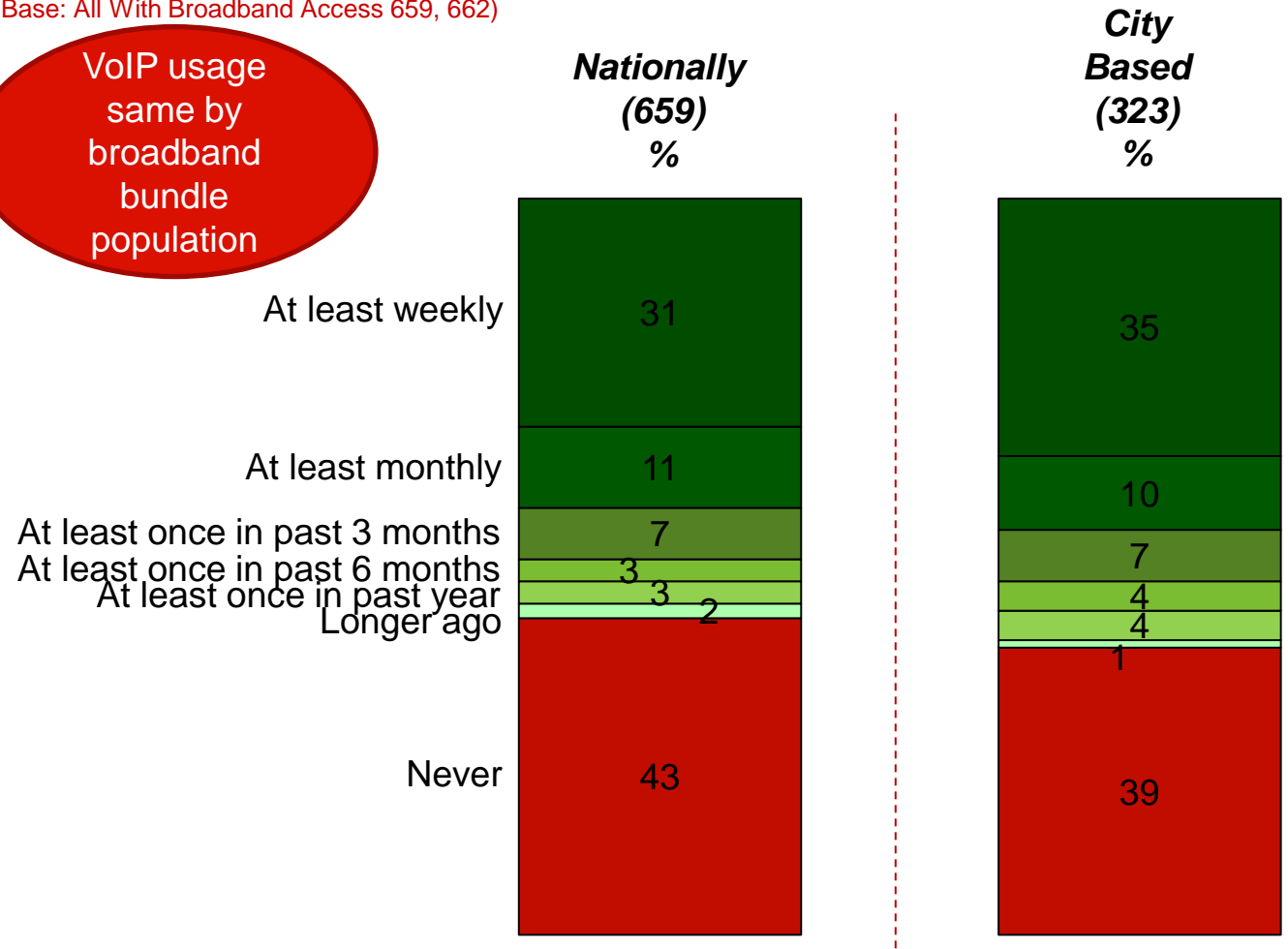
(Q 3)

Frequency Of Using Voice Over Broadband (Skype/Facetime/Viber) To Make Phone Call



(Base: All With Broadband Access 659, 662)

VoIP usage same by broadband bundle population



Young & Free
Have significantly higher frequency of usage

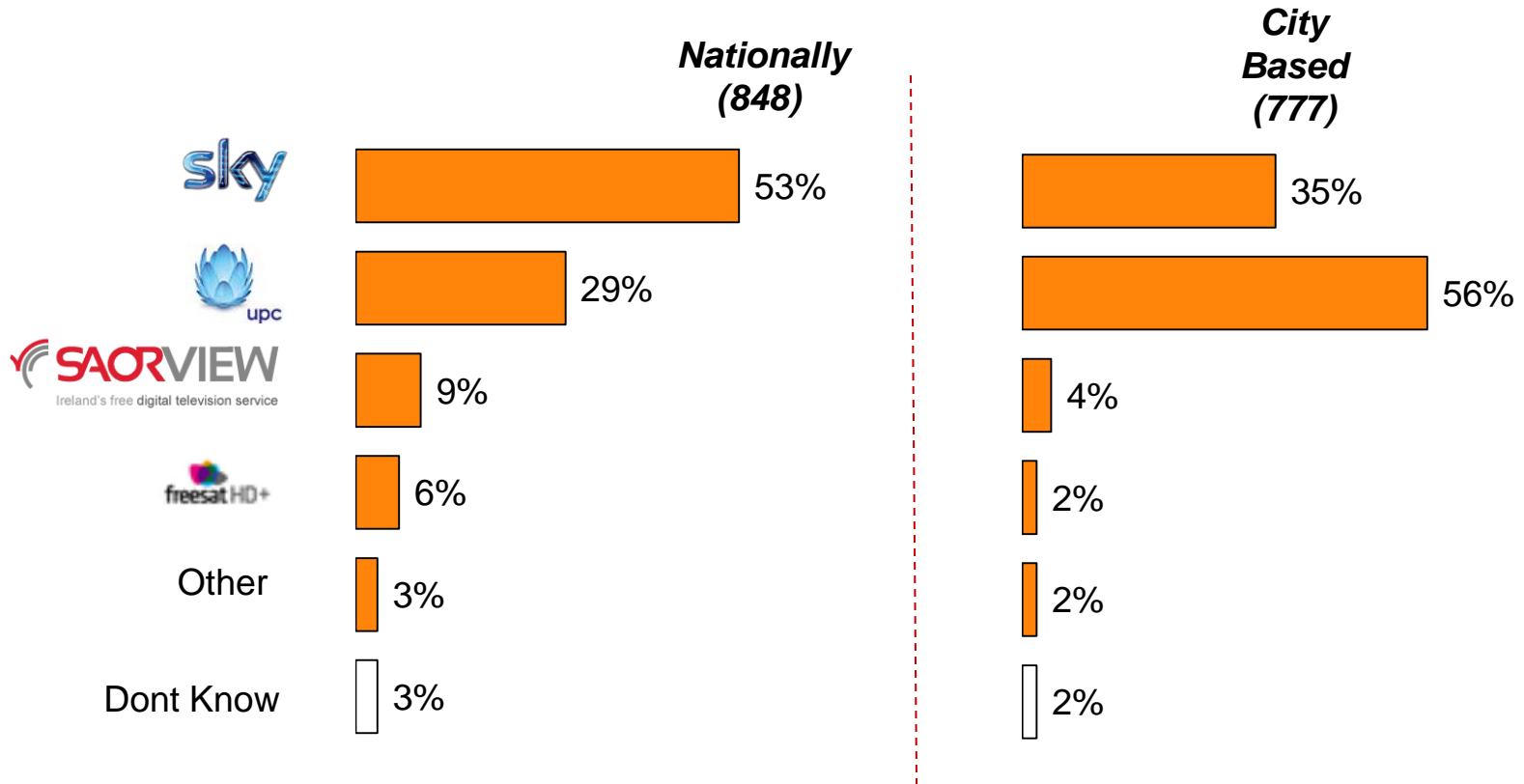
1 in 3 of those with broadband access are using Voice over Broadband weekly to make a phone call

(Q 3b)

Companies Currently Use For TV service



(Base: All TV service users – 848, City Based, 777)



Sky share of the national market is over 50% but is lower in city areas

(Q 8)

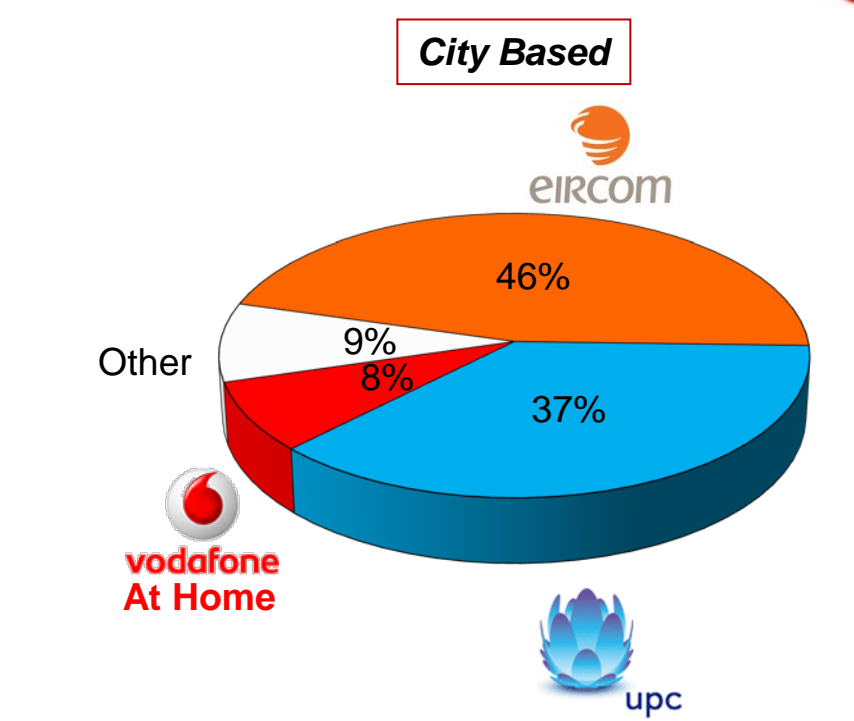
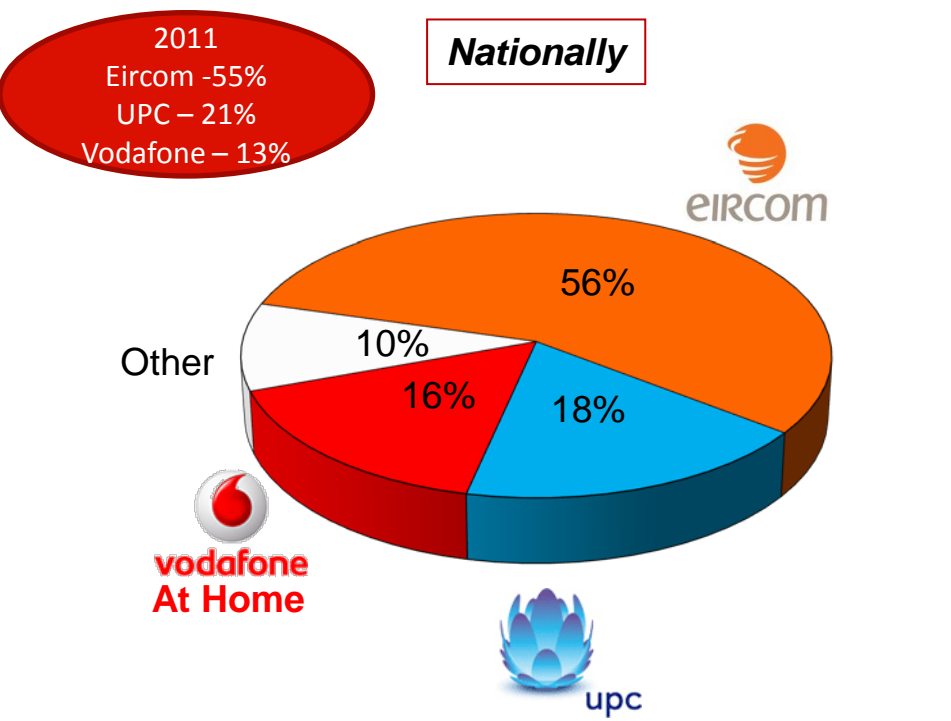




Landline

Main Provider Landline

(Base: All Landline Owners – 692, City Based 633)



	Urban	Rural	Landline Non Bundle	Broadband Bundle
Eircom	53	61	63	54
UPC	26	3	4	24
Vodafone	13	23	12	18

	Eircom	UPC	Vodafone
Dublin	44	42	6
Cork	55	14	25
Limerick	52	18	13
Galway	63	20	11

Significant difference exist in share by region nationally, and within cities around the country

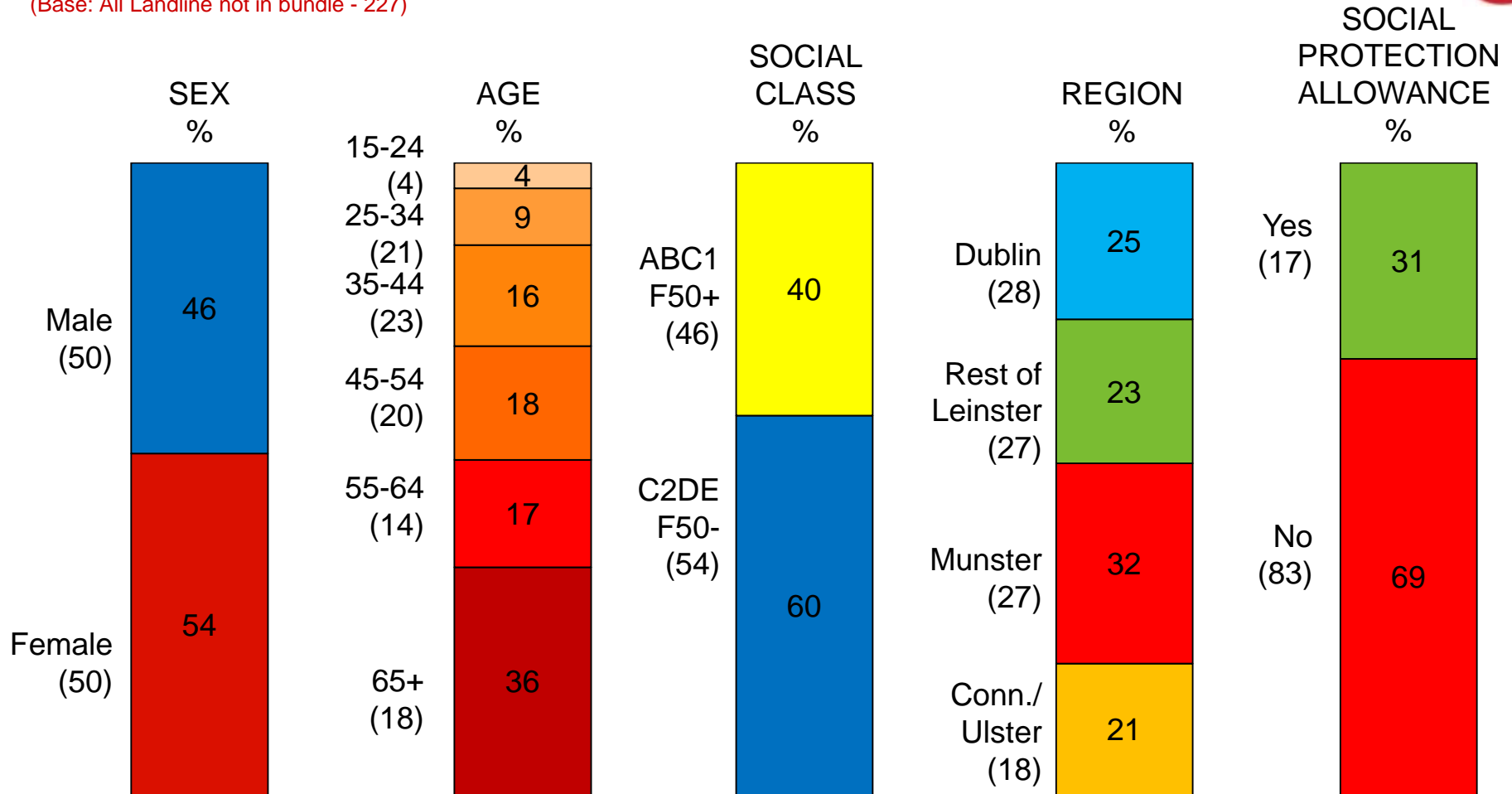
(Q 4a)

Other = IFA Telecom, UTV, Pure, Telecom, Rapid Broadband

Demographic Profile of Landline Non Bundle Population



(Base: All Landline not in bundle - 227)



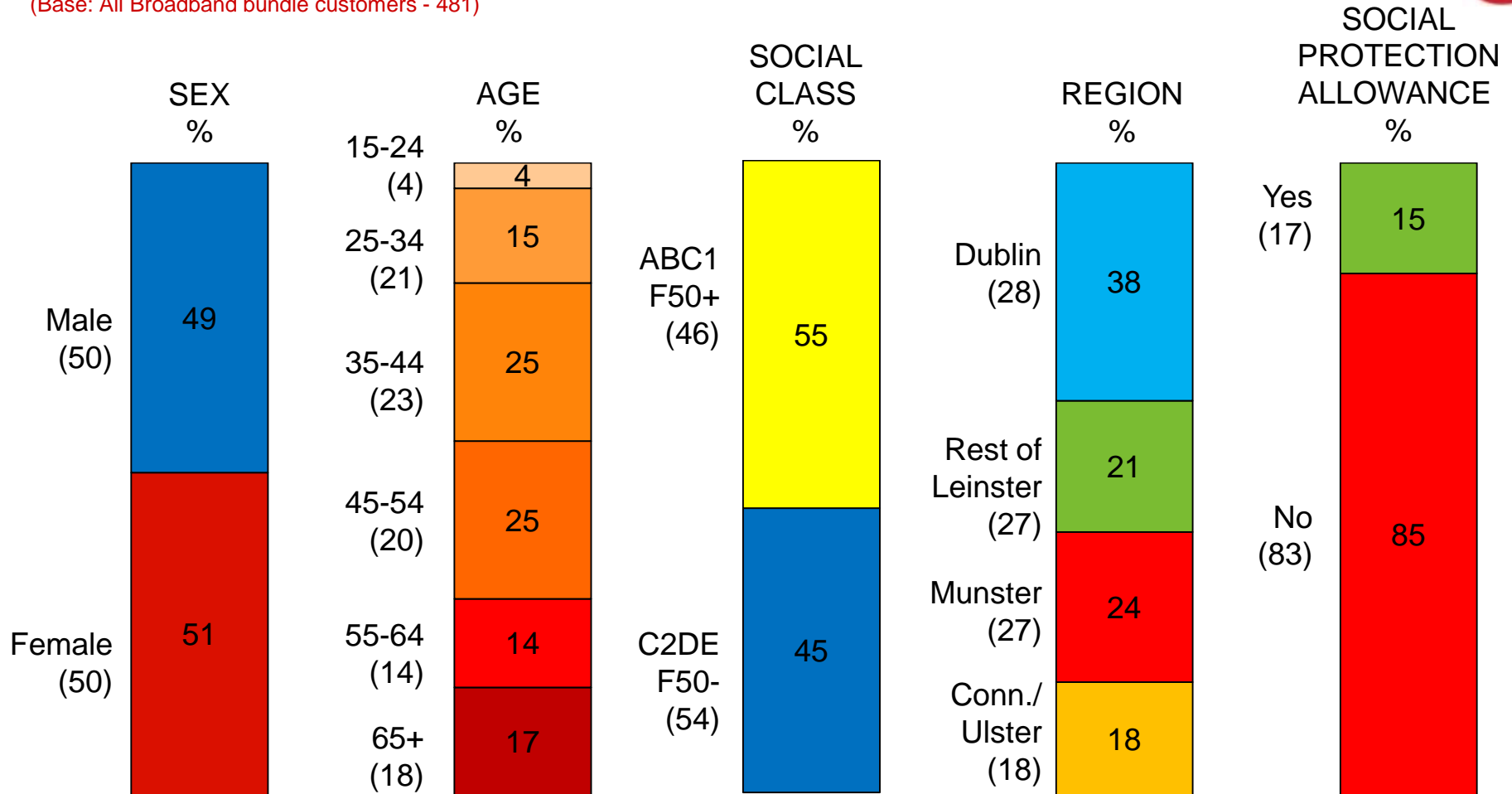
Landline Non Bundle population more likely older and from Munster Conn/Ulster and to avail of social protection allowance



Demographic Profile Bundle Population



(Base: All Broadband bundle customers - 481)

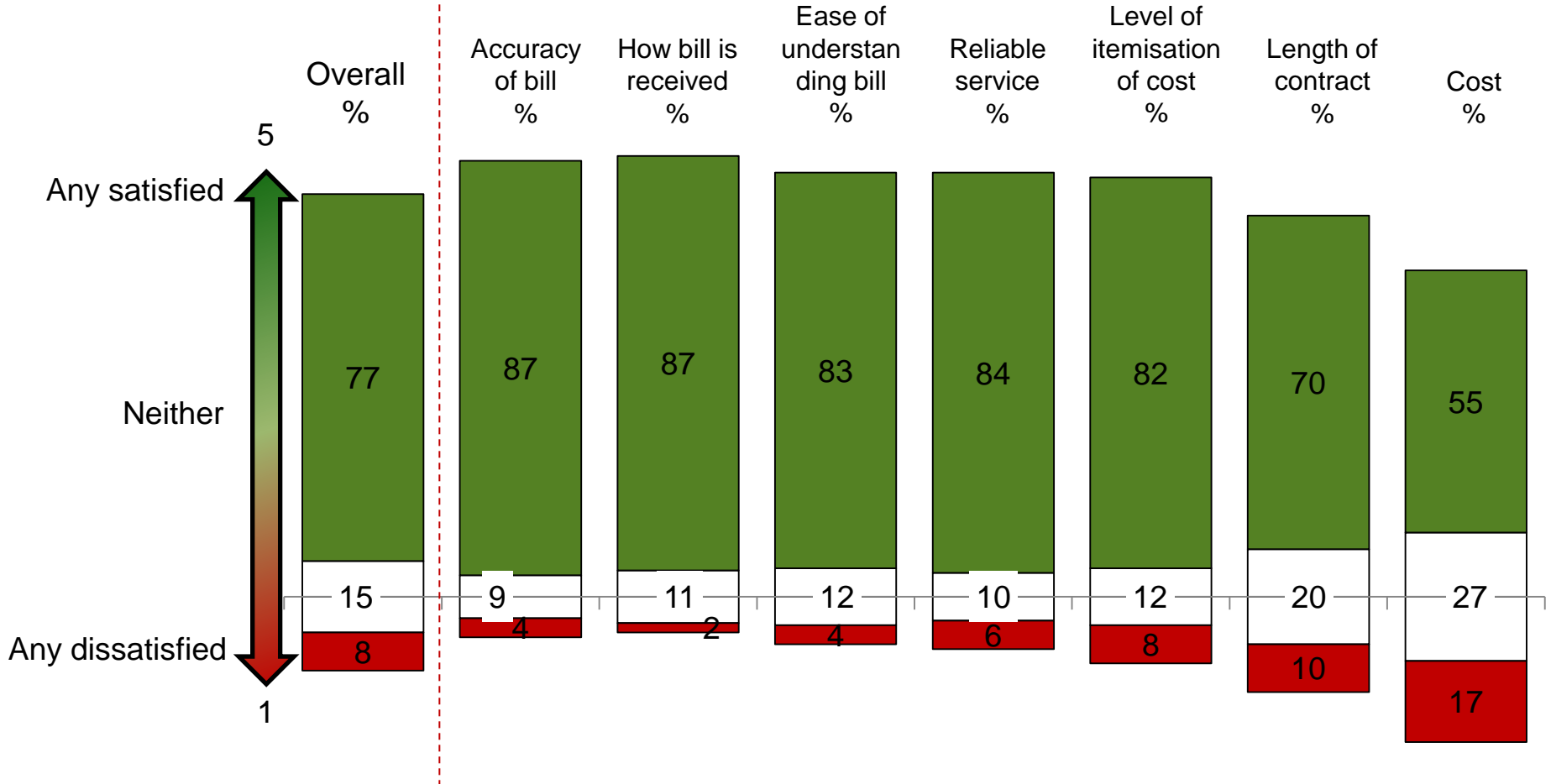


The Broadband bundle population most likely 25-34, higher social class and from Dublin

Overall Satisfaction & Satisfaction On Various Elements Of Landline Service



(Base: All Landline Users – 692)



Satisfaction highest on billing measures and less so on contract length and cost

(Q 11b)

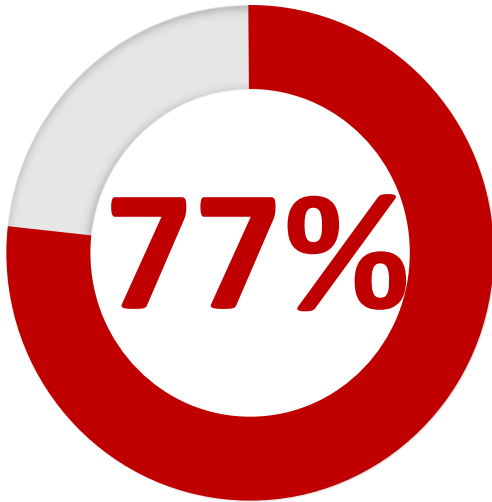


What Aspects Of Service Impact On Overall Satisfaction The Most

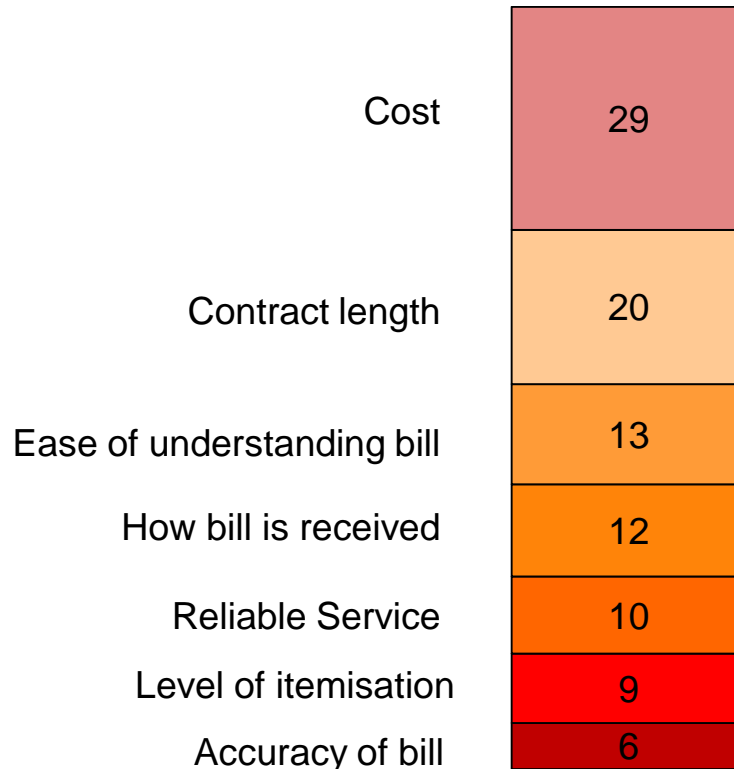
(Base: All Landline Users – 692)



Overall Satisfaction



Factors Driving Overall Satisfaction %



Most Important



Least Important

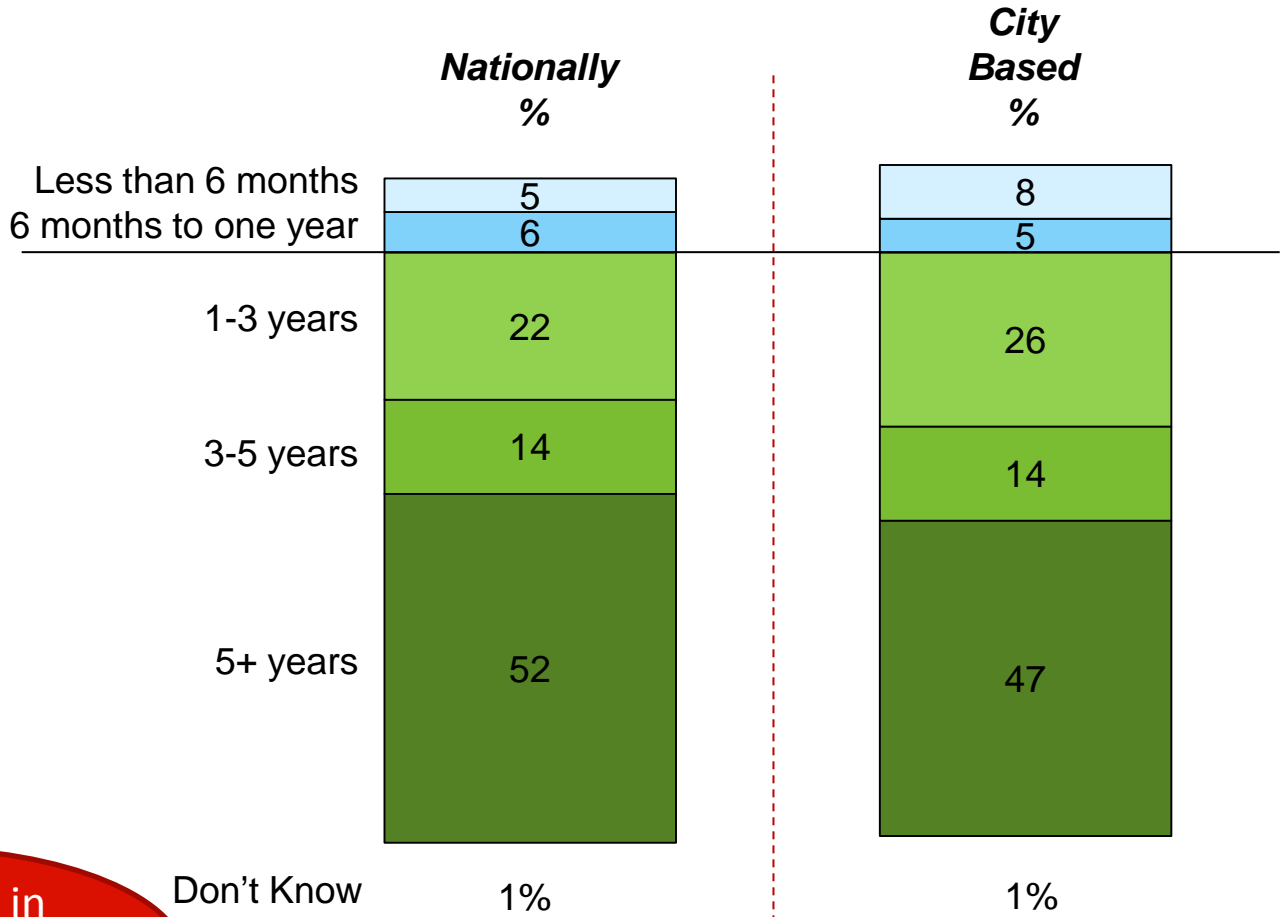
Cost and Contract Length are the most important drivers of overall satisfaction. Concentrating on these aspects will increase satisfaction more than any of the other measures

Length Of Time With Current Landline Provider

(Base: All Landline Users – 692, City Based 633)

Landline not bundle
5+ Years
63%

Shorter



No Difference
Urban/Rural

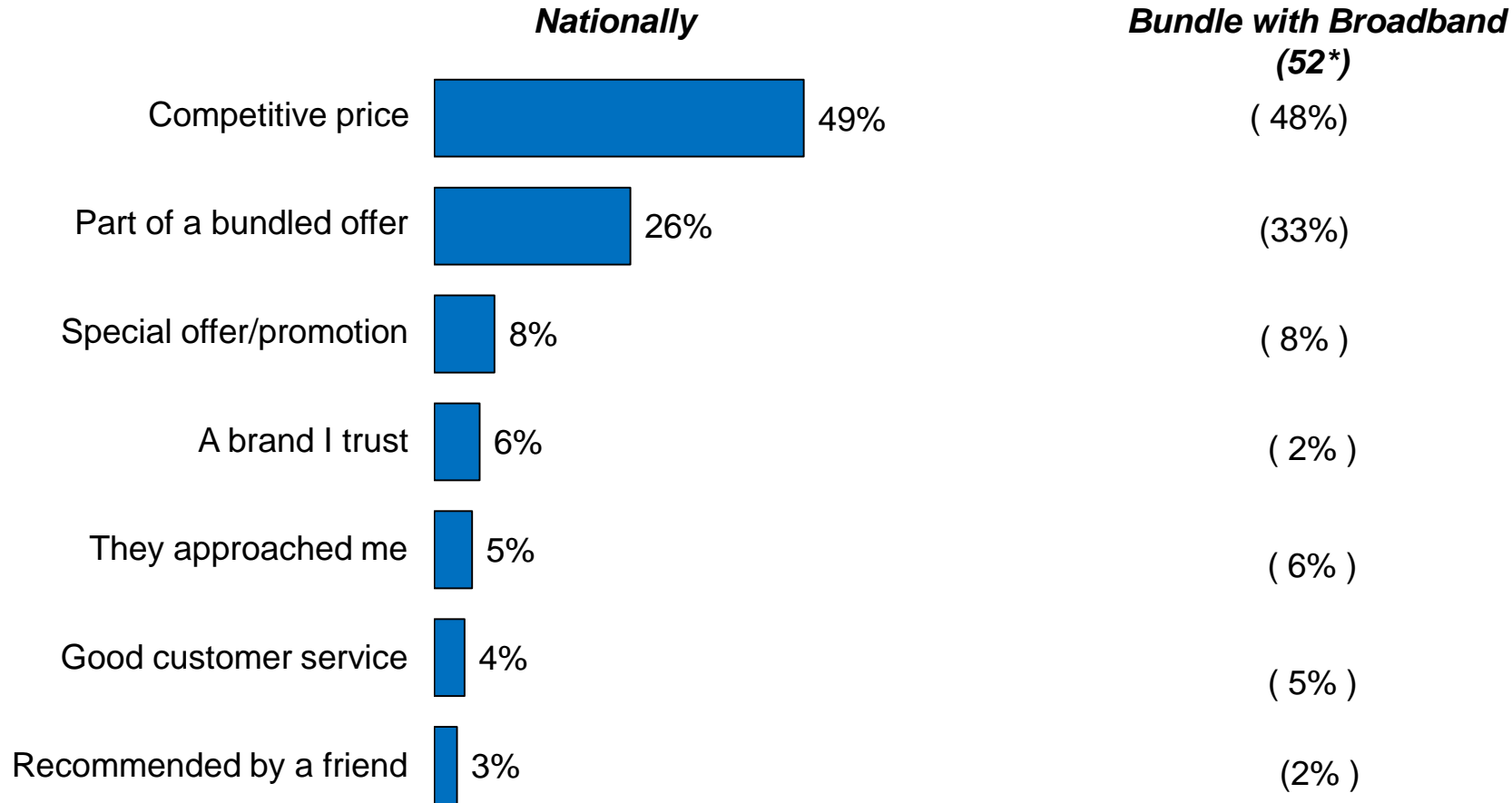
Broadband in bundle 5+ Years
49%

Over 1 in 10 with current provider for one year or less, slightly higher in city areas

What Prompted The Selection Of Landline Provider Within Past Year



(Base: All Those Who Joined New Provider – 81)



(Q 13)

City base too small to show

RESEARCH EVALUATION DIRECTION CLARITY

* Small Base



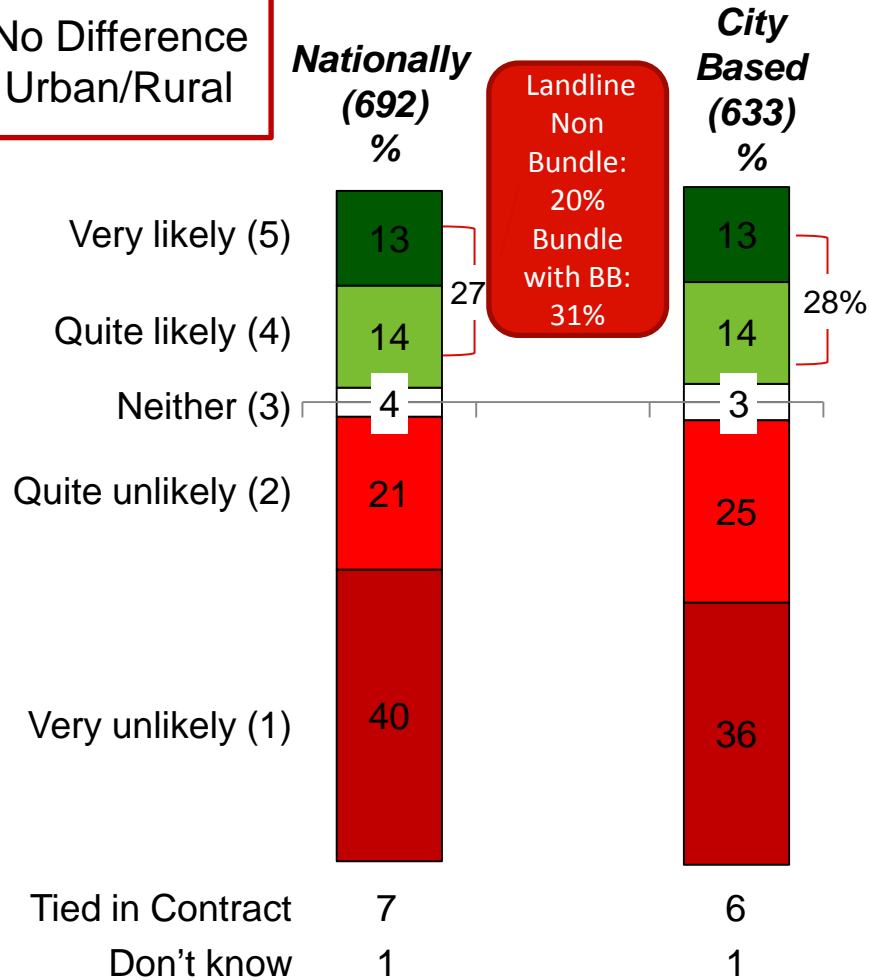
Commission for
Communications Regulation

Consideration Of Switching – Next 12 Months

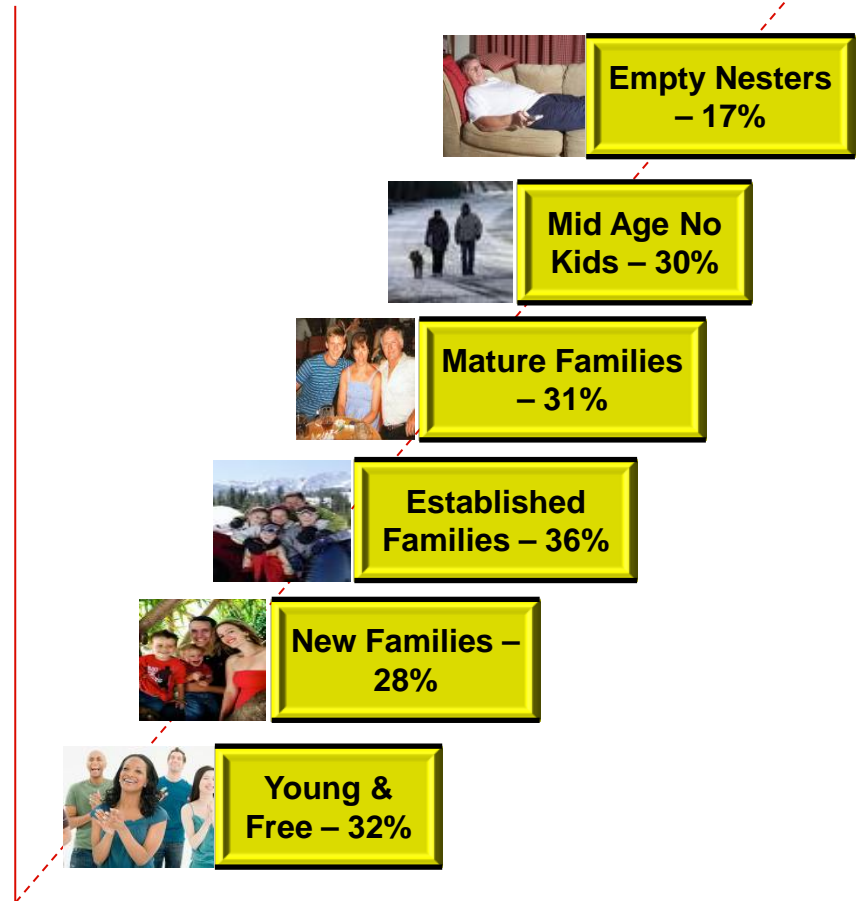
(Base: All Landline Users – 692, City Based 633)



No Difference
Urban/Rural



Life stage Consideration To Switch



Consideration to switch is higher at over 1 in 4 claiming they will switch next 12 months.
Established Family homes most likely to switch

(Q 14)



What Home Landline Telephone Service Is Used For?

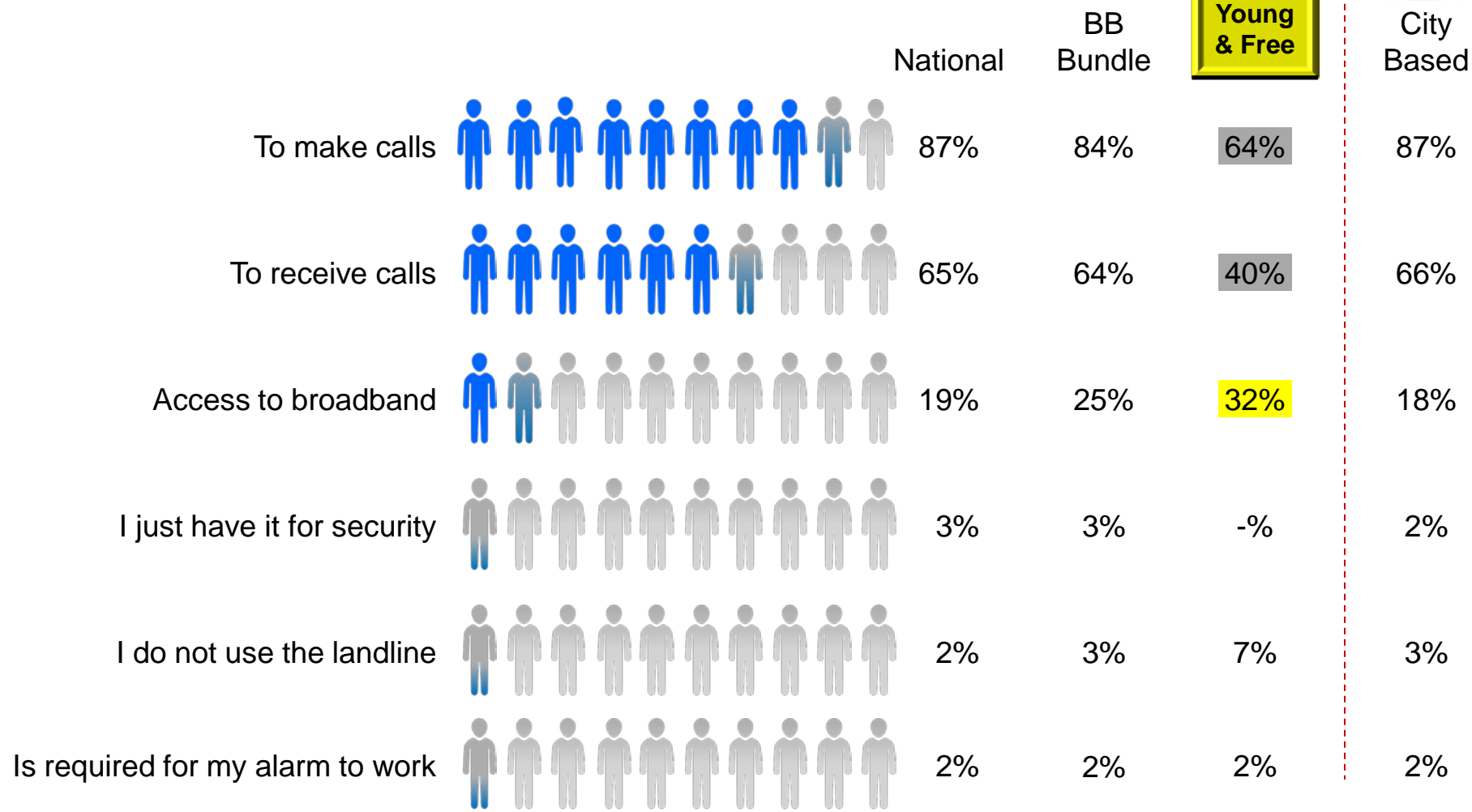
(Base: All With Home Landline Service – 692, City Based 633)



Young & Free

C

City Based



Telephone service most likely used for making calls. Young and Free group using landline service differently to other groups with access to broadband more important

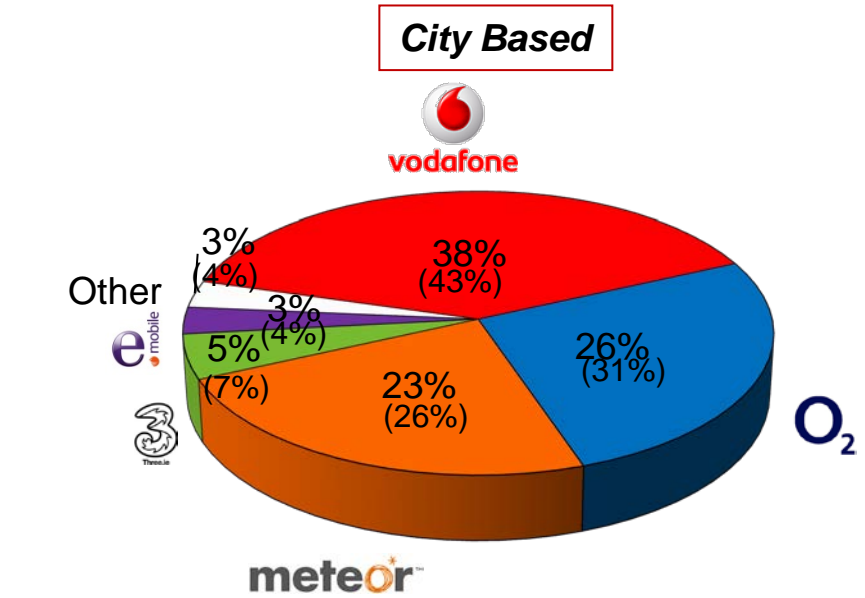
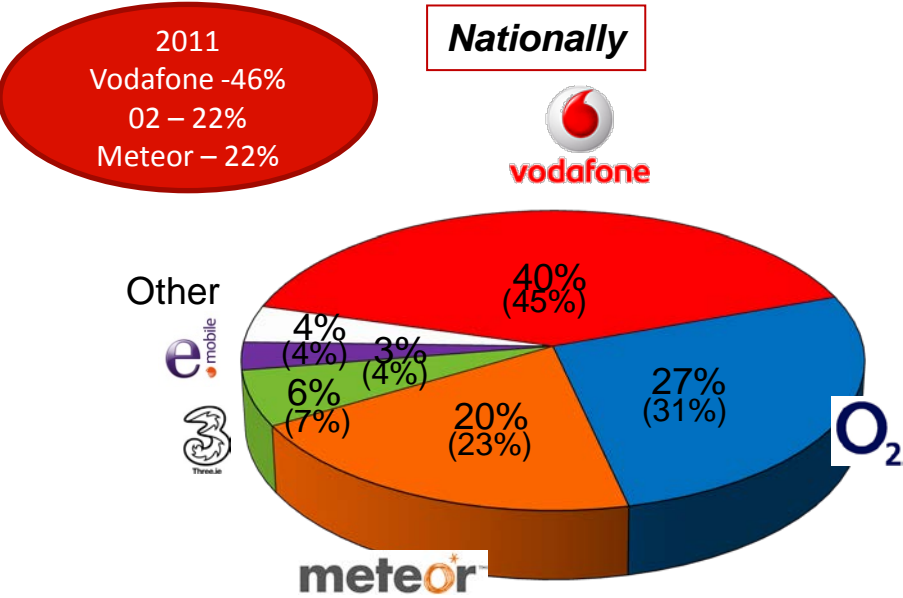




Mobile Phone

Mobile Phone Provider

(Base: All With Mobile Phone – 975, City Based, 880)



	Main Provider				
	Vodafone	O2	Meteor	3	E-mobile
Dublin	37%	26%	25%	5%	3%
Cork	42%	32%	12%	6%	4%
Limerick	39%	31%	17%	2%	7%
Galway	37%	24%	28%	5%	5%

Meteor taking slightly higher share in the city sample highest in Dublin and Galway

(Q 5a/b)

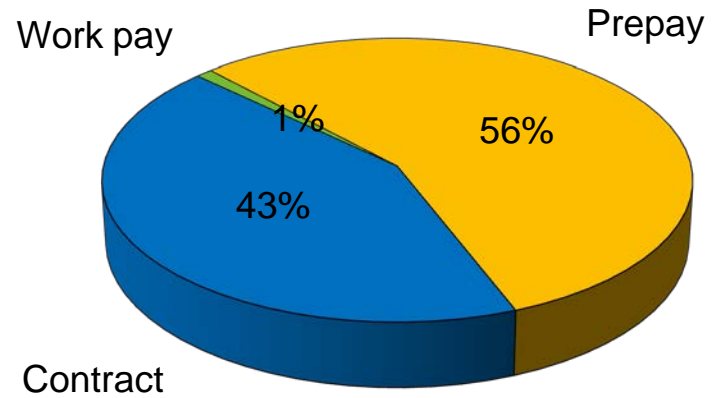
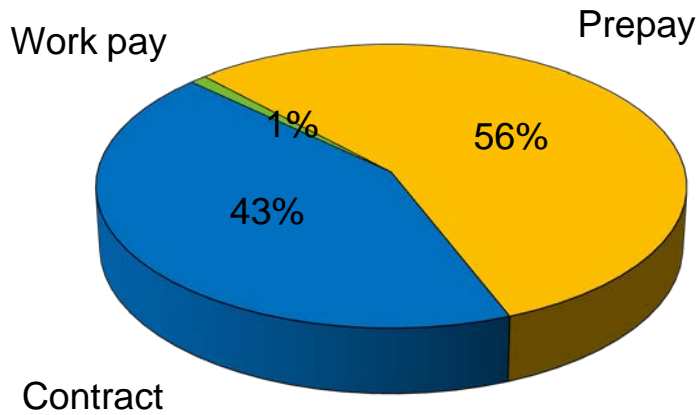
Contract Type

(Base: All With Mobile Phone – 975, City Based 880)



Nationally

City Based



2011
Pre Pay
62%

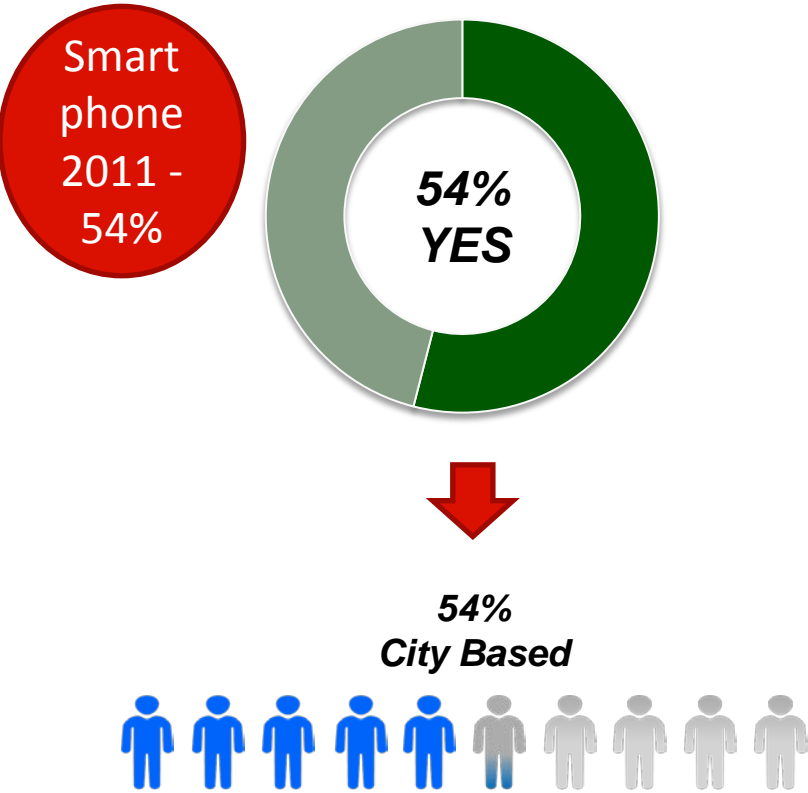


Empty Nesters
Significantly higher
PrePay

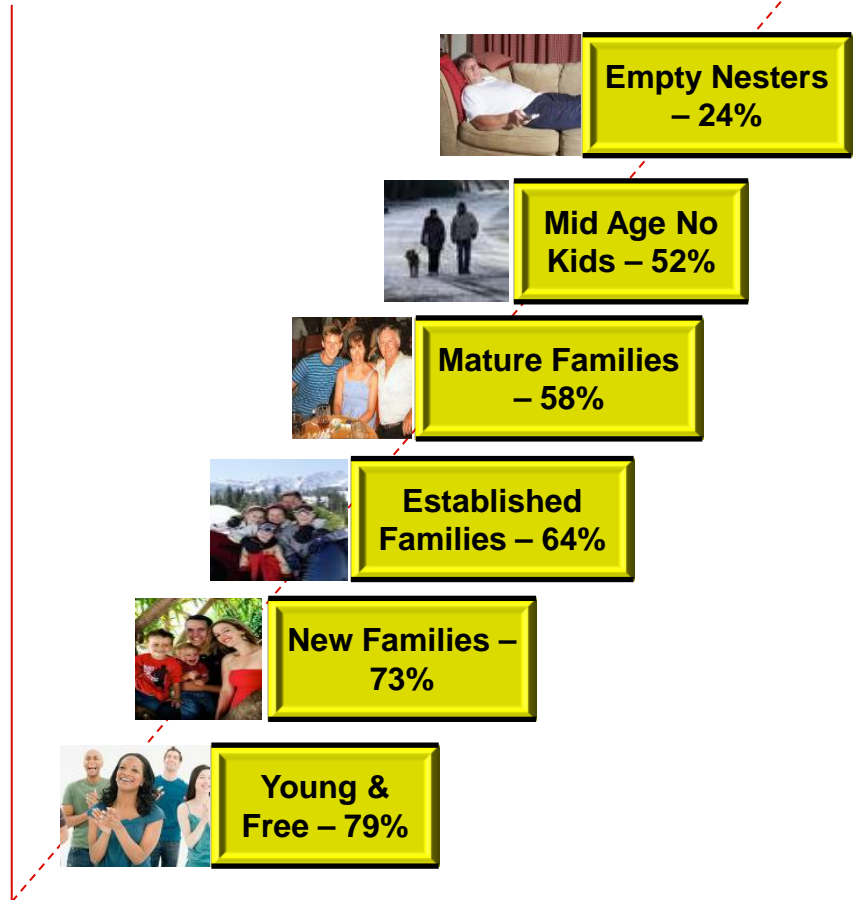
Over 2 in 5 have a contract with their mobile phone supplier. Prepay highest for Empty Nesters

Smartphone Ownership

(Base: All With Mobile Phone – 975, City Based - 880)



Life Stage



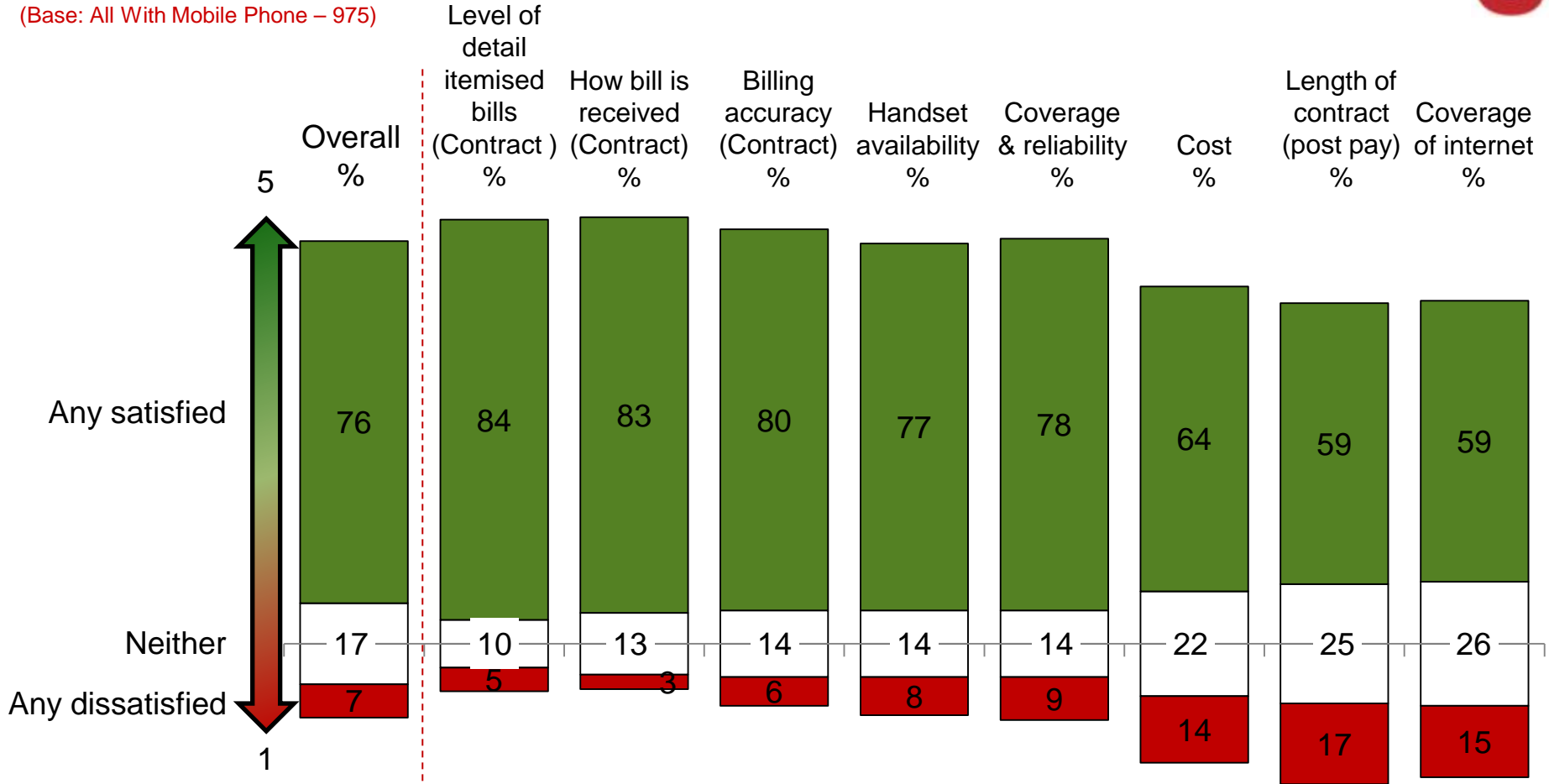
Over half have a Smartphone highest among Young and Free

(Q 18)

Satisfaction With Mobile Phone Service



(Base: All With Mobile Phone – 975)



Similar to landline satisfaction is higher on bill elements. Satisfaction lowest of cost, contract length and internet coverage on phone

(Q 19b)

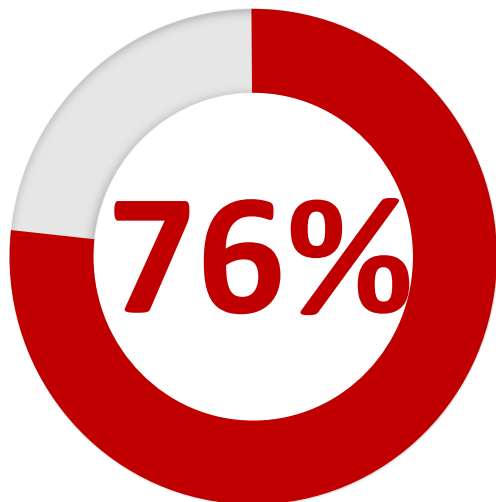


What Aspects Of Service Impact On Overall Satisfaction The Most

(Base: All Landline Users – 692)



Overall Satisfaction



Factors Driving Overall Satisfaction %

Internet Coverage	21
Cost	17
Length of contract	12
Handset Availability	12
Billing Accuracy	12
Billing itemisation	10
Network Coverage	10
How bill is received	7

Most Important



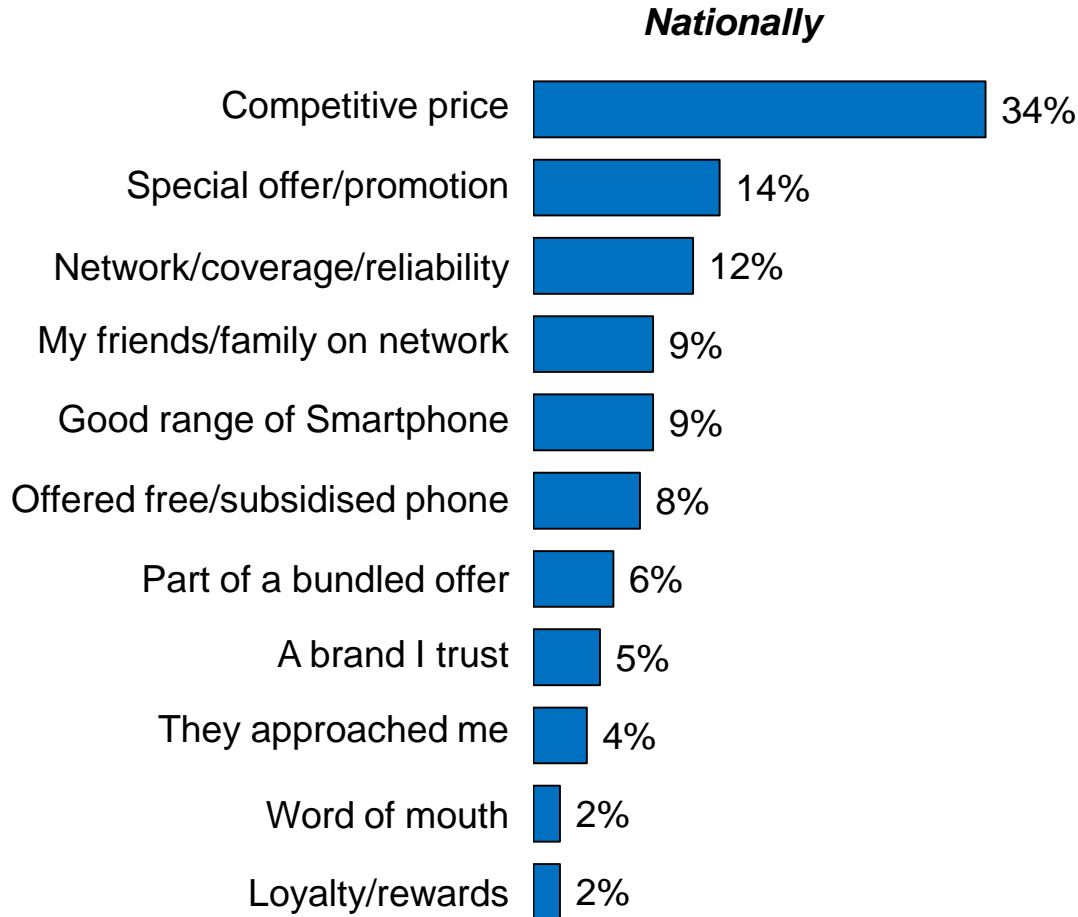
Least Important

Cost and internet coverage are key drivers of satisfaction

What Promoted The Selection Of Mobile Phone Provider Within Past Year



(Base: All With Phone Provider Past 12 Months – 80)



Along with price network coverage/reliability is a key reason for joining new providers

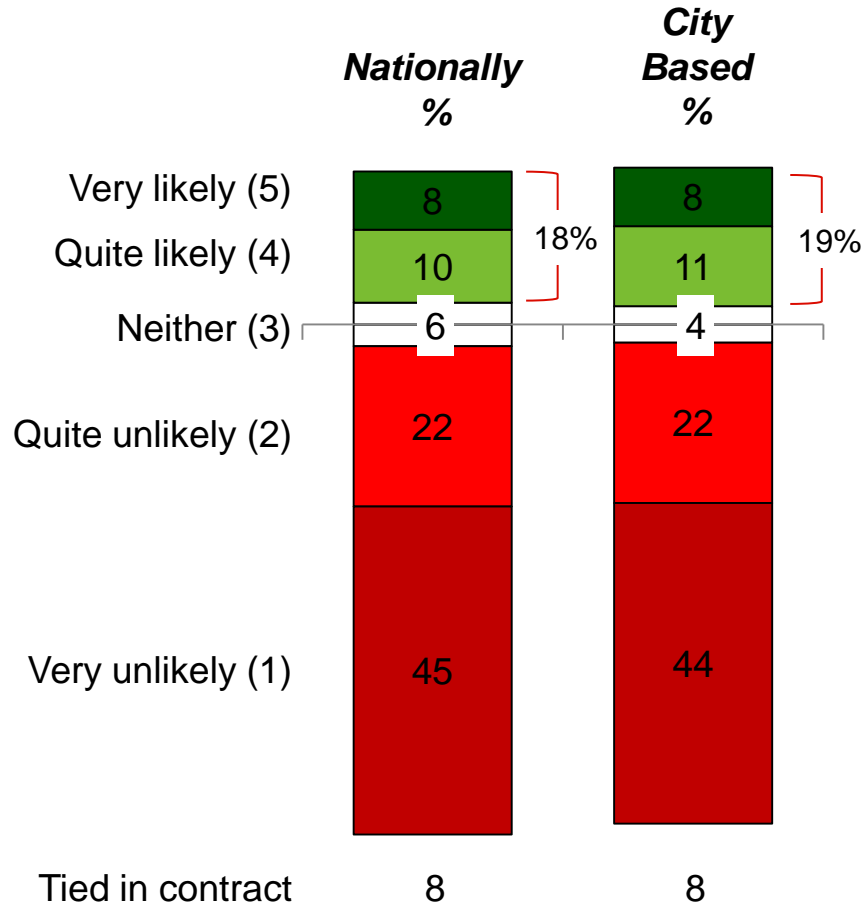
(Q 21)



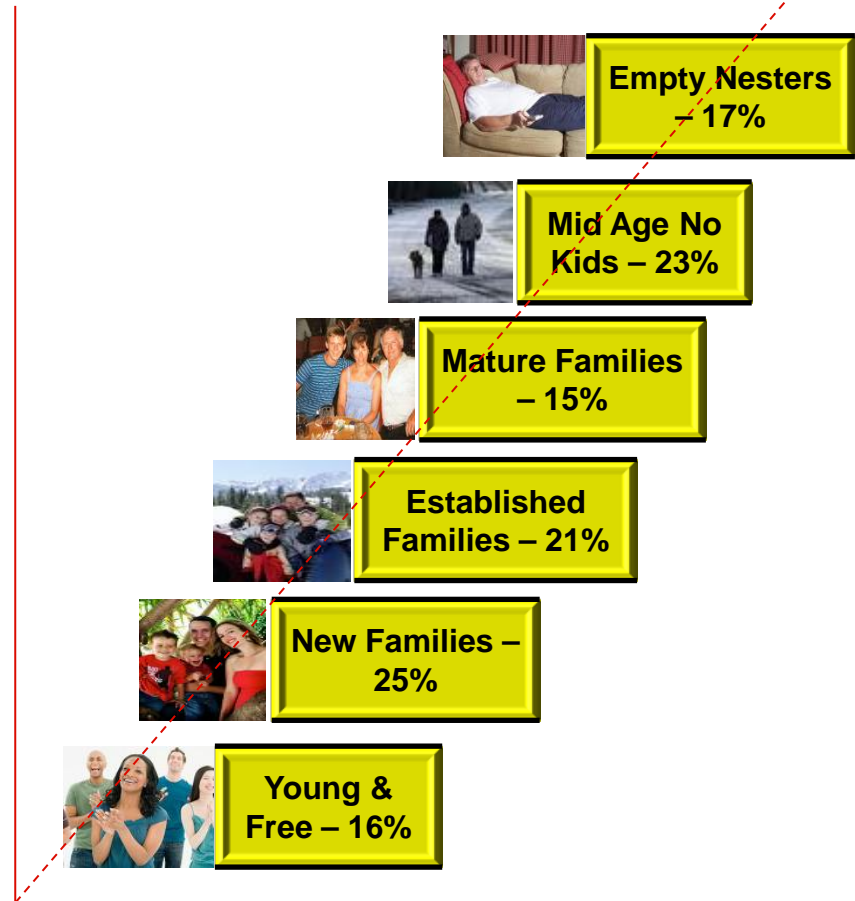
Consideration Of Switching – Next 12 Months



(Base: All Mobile Phone Users – 975, City Based - 880)



Life stage



Claimed likelihood to switch is higher than actual movement in the past year. Switching Intention is lower in the mobile phone market than that witnessed in landline.

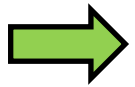
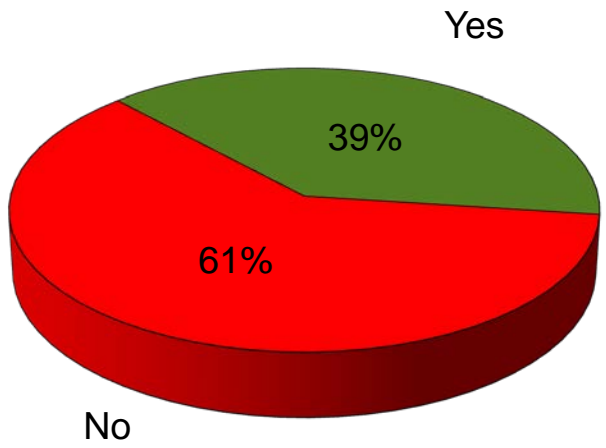
(Q 22)

Incidence Of Receiving Text Advising That You Are Close To Data Allowance

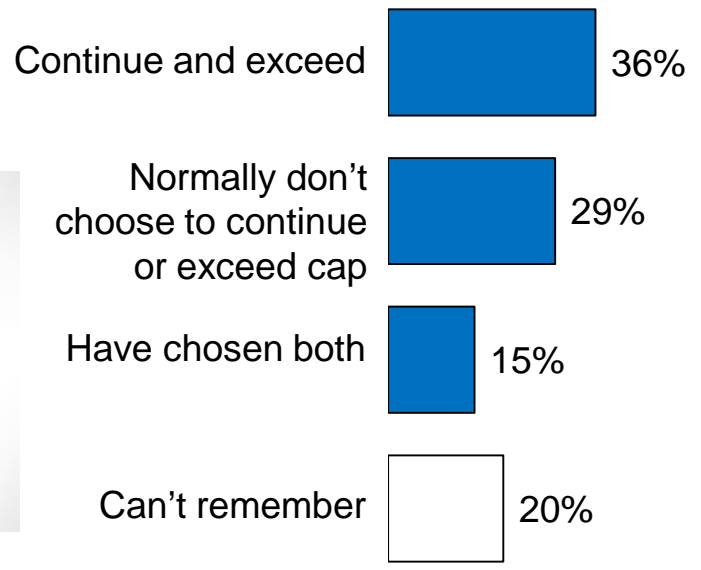


(Base: All Smartphone Owners – 518, City Based - 474)

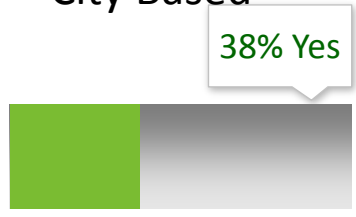
Nationally



Impact of Message



City Based



Almost 2 in 5 Smartphone owners received a text advising of data allowance limit

(Q 24/25)



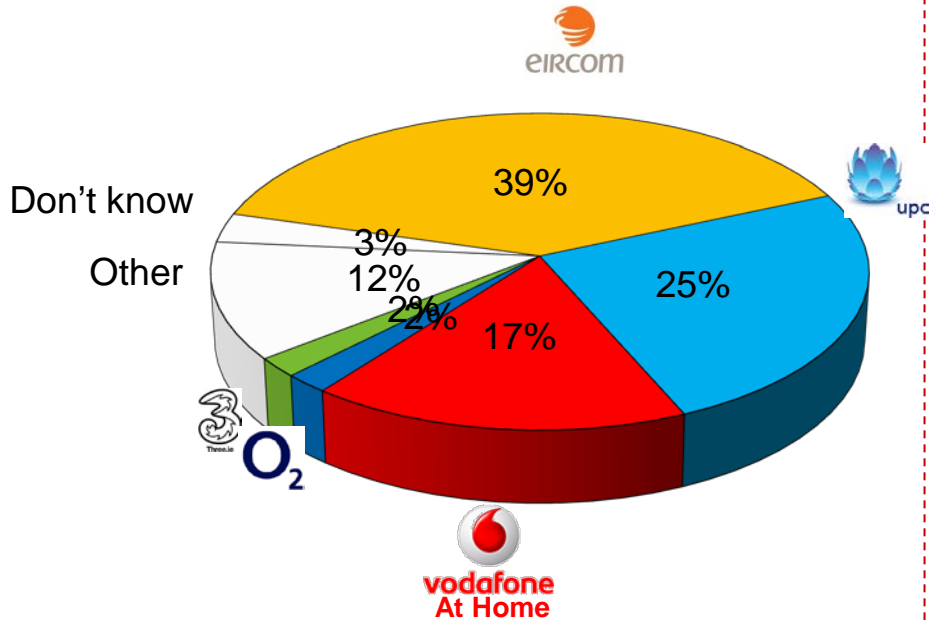
Fixed Broadband

Main Fixed Line Broadband Provider

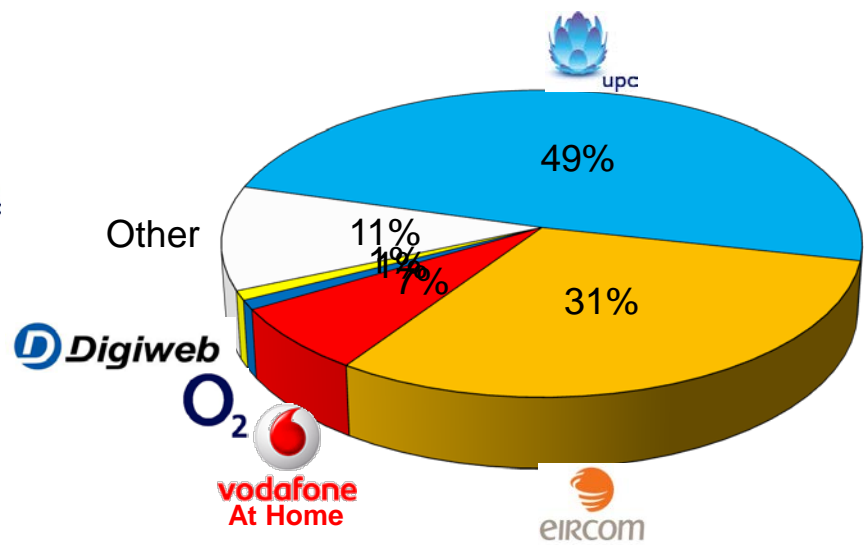
(Base: All With Fixed Broadband – 659, City Based - 662)



Nationally



City Based



	Urban	Rural	Non Bundle landline	Bundle Broadband included
Eircom	38	43	16	48
UPC	35	5	19	29
Vodafone	13	26	21	17

	Main Provider		
	Eircom	UPC	Vodafone
Dublin	29%	55%	4%
Cork	39%	16%	23%
Limerick	39%	27%	15%
Galway	42%	30%	11%

(Q 7a/b)

Eircom have a dominant share nationally yet not so in city areas particularly in Dublin

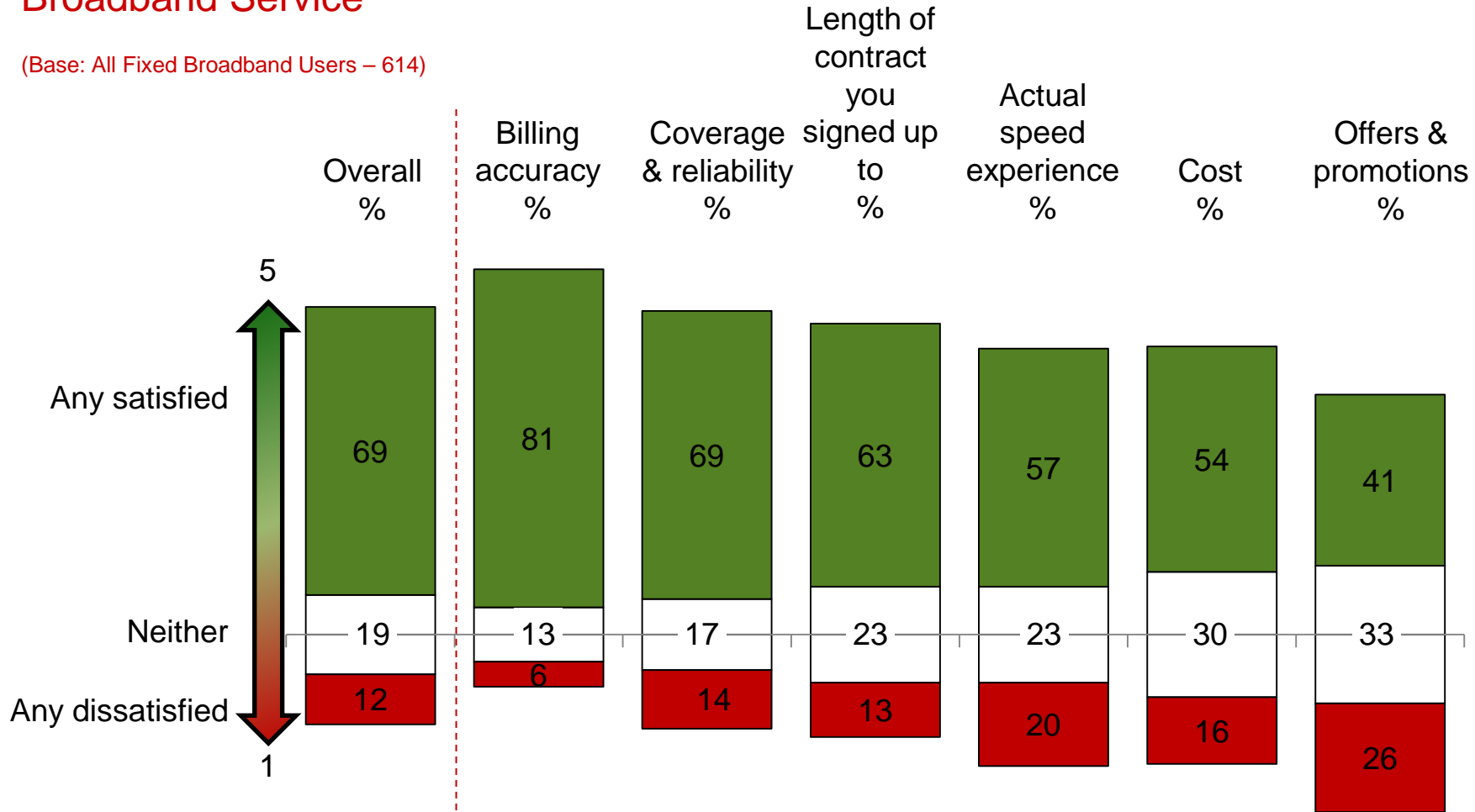
() = Any Provider Share = Main Share

Others: Digiweb, Magnet, Imagine, Sky, Gaelic Telecom, Irish Broadband, Pure, Clearwire.

Overall Satisfaction and Satisfaction On Various Elements Of Fixed Broadband Service



(Base: All Fixed Broadband Users – 614)



Users are most satisfied with billing accuracy and least so on actual speed, cost and offers and promotions

(Q 36b)

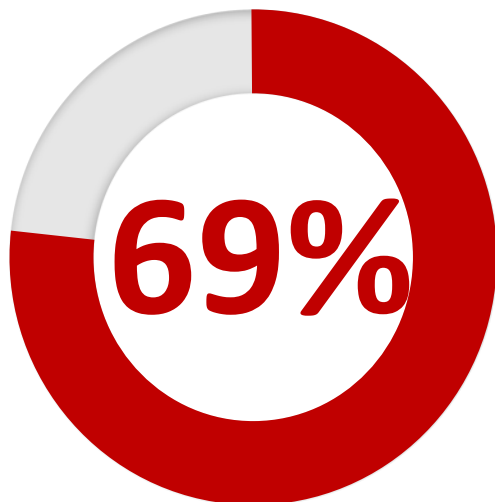


What Aspects Of Service Impact On Overall Satisfaction The Most

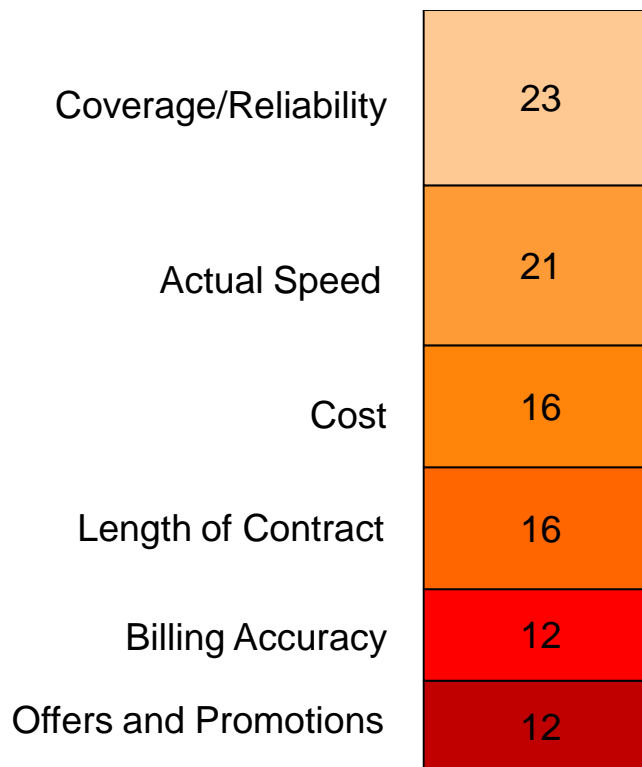
(Base: All Fixed Broadband Users – 614)



Overall Satisfaction



Factors Driving Overall Satisfaction %



Most Important



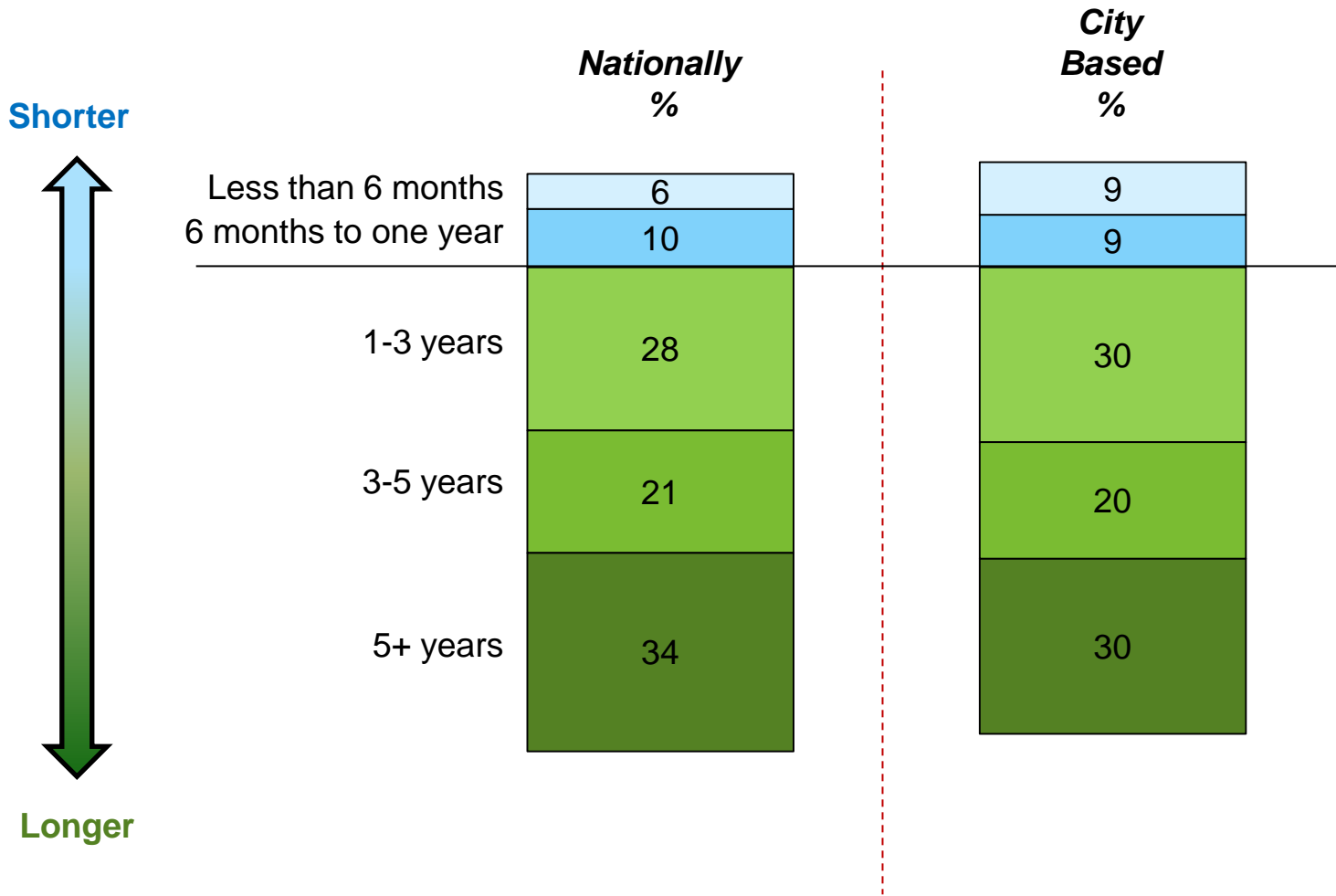
Least Important

A priority area for improvement is coverage/reliability and speed of service experienced

Length Of Time With Current Fixed Broadband Provider



(Base: All With Fixed Broadband – 614, City Based - 628)



Almost 1 in 5 in city areas have been with their provider for a year or less

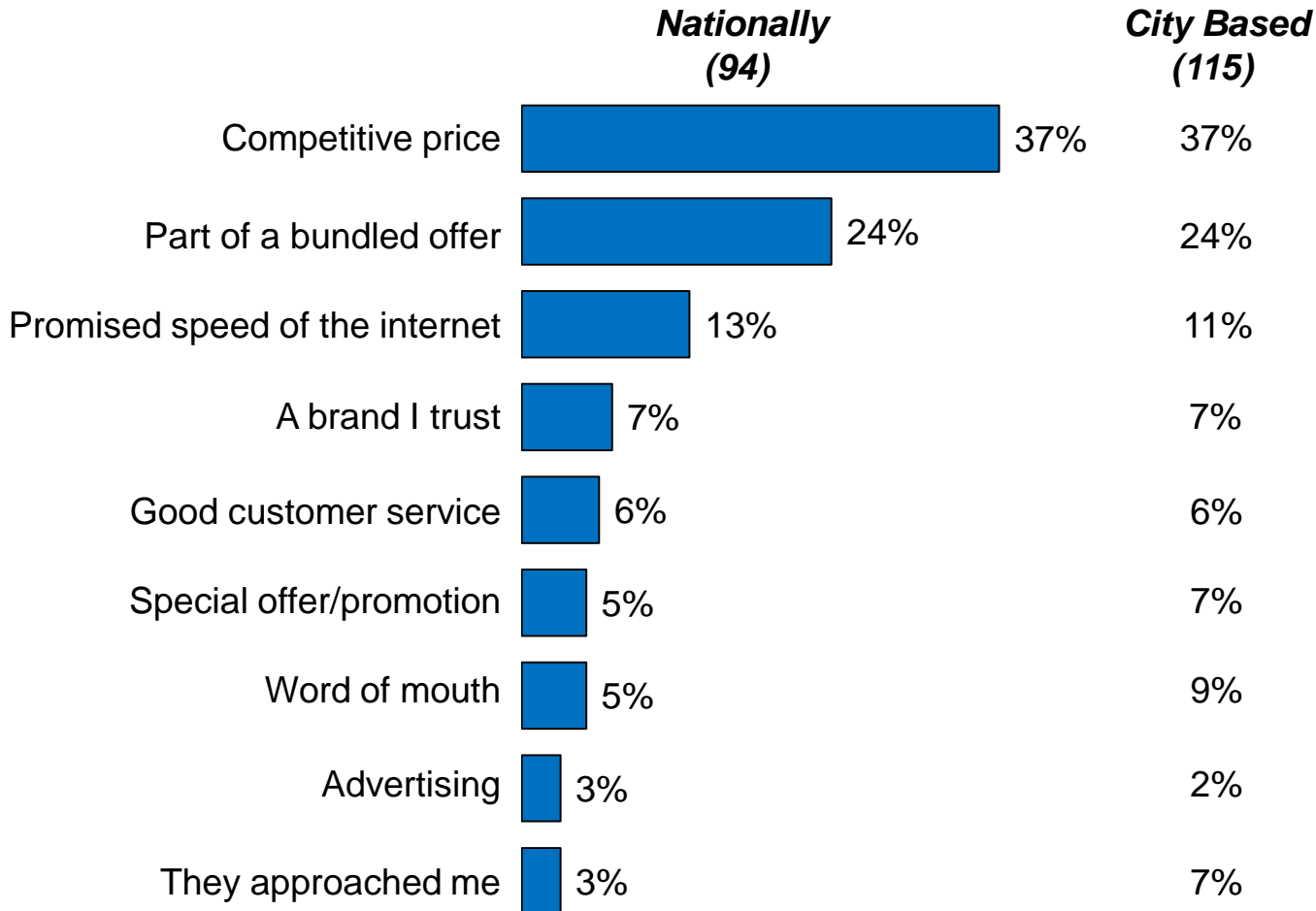
(Q 37)



What Promoted The Selection Of Fixed Broadband Provider Within Past Year



(Base: All Those Who Joined New Provider Past 12 Months)



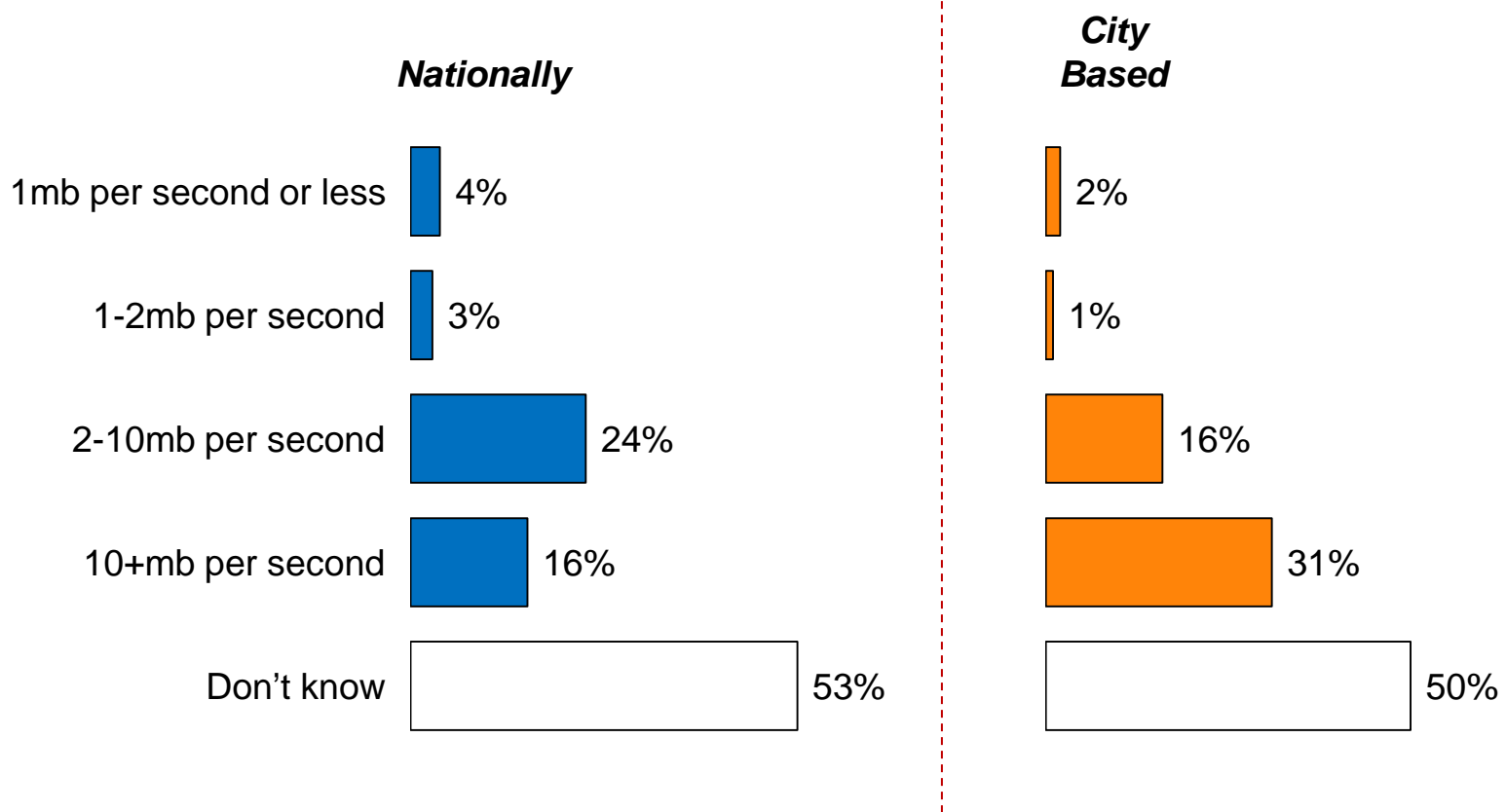
Pricing aspects and bundles are driving movements in the market

(Q 38)

What Is The Download Speed Of Your Fixed Broadband Service?



(Base: All With Fixed Broadband – 614, City Based 628)

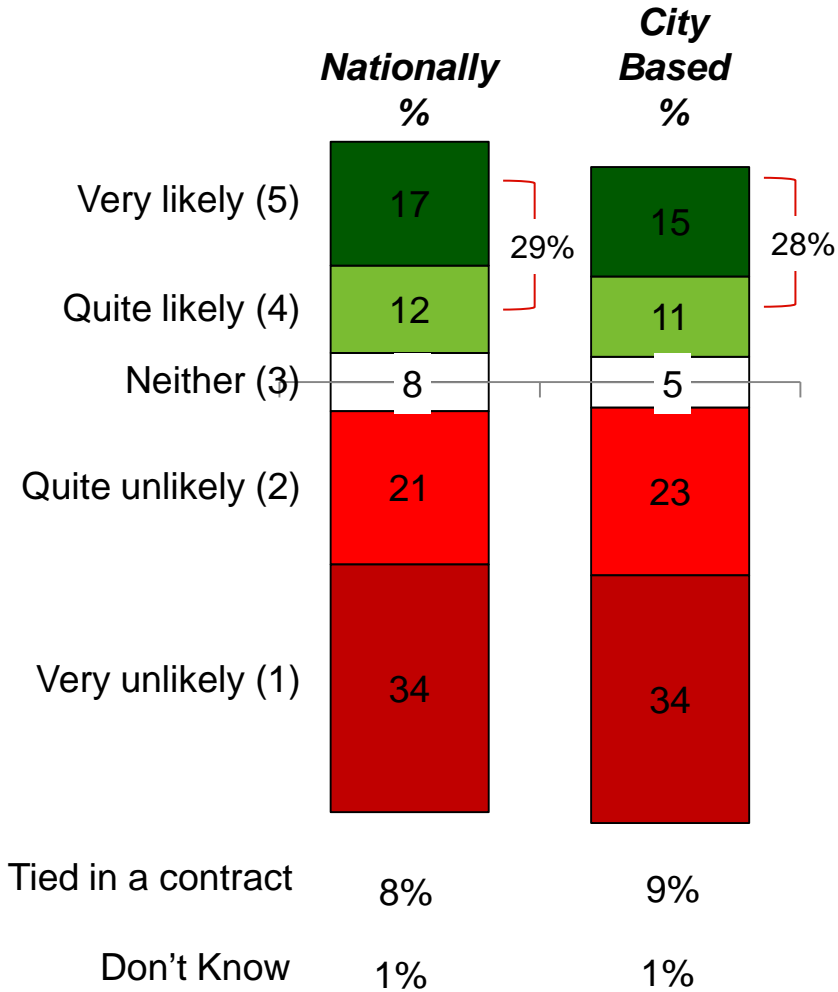


(Q 39)

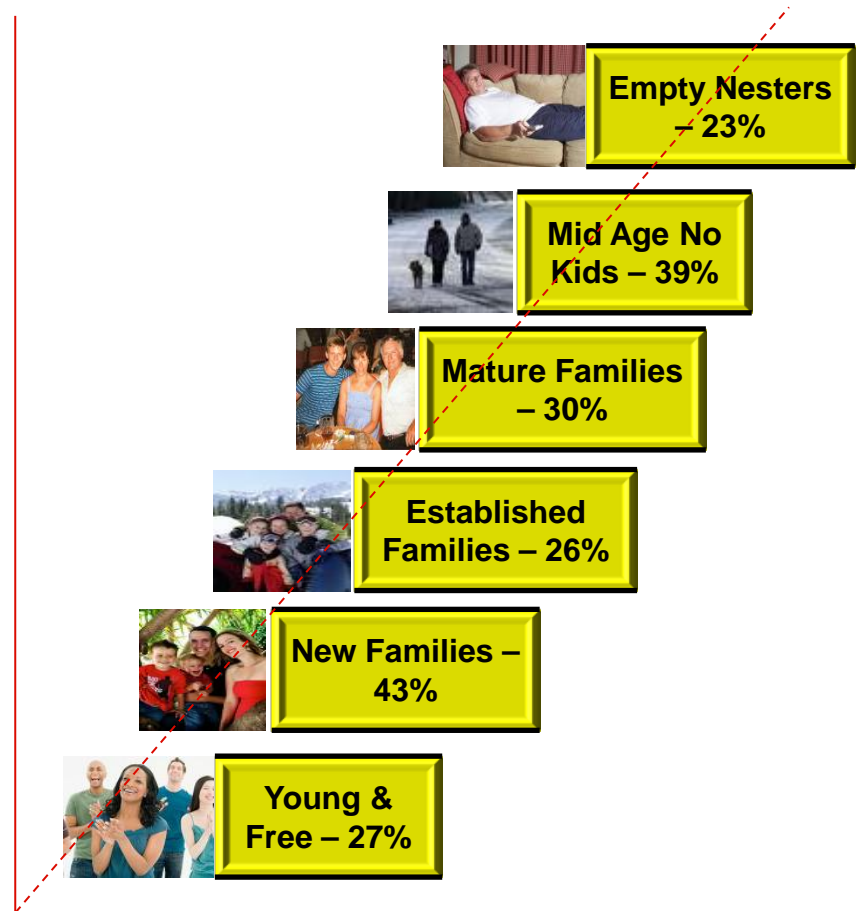


Consideration Of Switching – Next 12 months

(Base: All With Fixed Broadband – 614, City Based - 628)



Life stage Consideration To Switch



Over 1 in 4 considering switching fixed provider in next 12 months highest amongst new families

Willingness To Pay More For Higher Speed Fixed Broadband



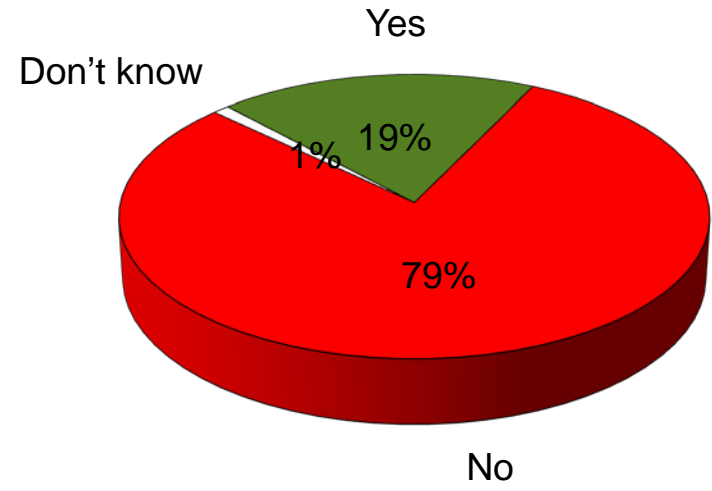
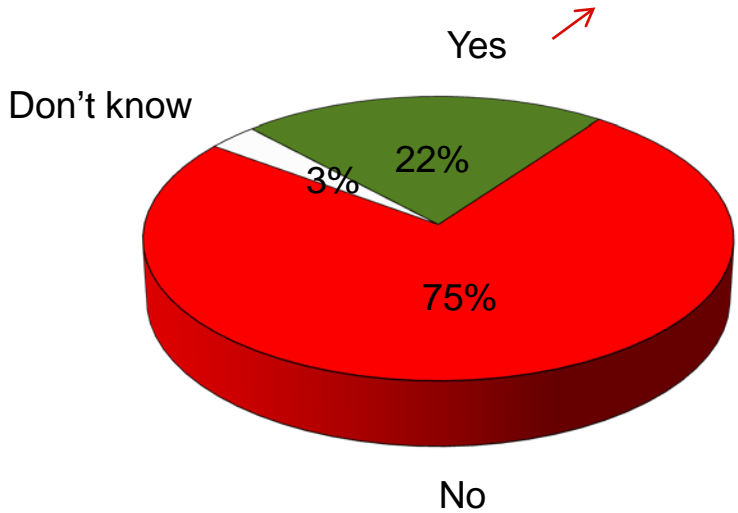
(Base: All With Fixed Broadband – 614, 628)



**Highest For:
Young & Free
37%**

Nationally

City Based



	10MB Fixed BB	Less than 10MB+DK
Yes	15	31
No	83	67
Don't know	2	2

	10MB Fixed BB	Less than 10MB+DK
Yes	17	25
No	83	71
Don't know		4

(Q 42)

1 in 5 nationally willing to pay more for higher fixed broadband speed – lower in city areas



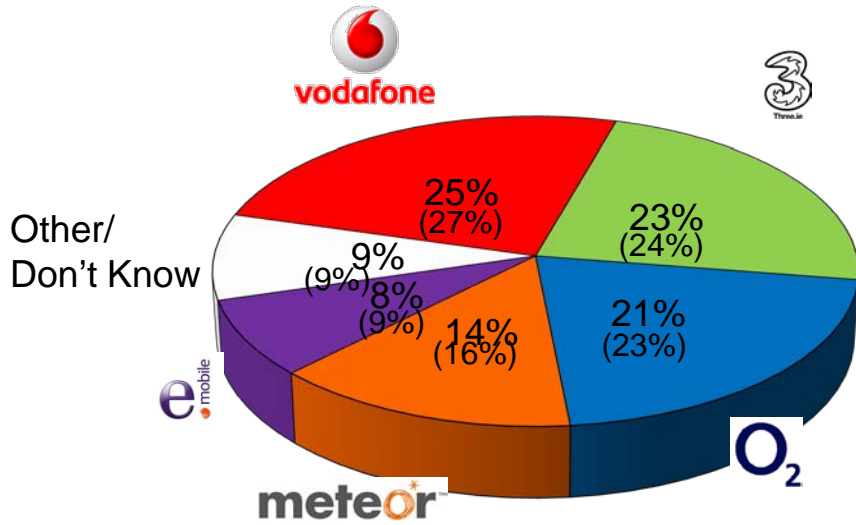
Mobile Broadband

Main Mobile Broadband Provider

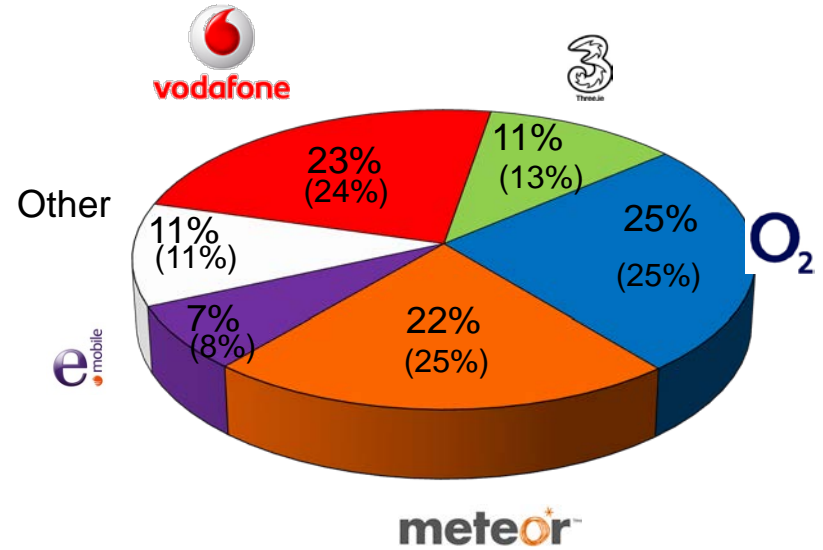
(Base: All With Mobile Broadband – 217, City Based -157)



Nationally



City Based



	Urban	Rural
Vodafone	24	26
3	22	24
O2	18	24
Meteor	16	13
eMobile	8	7

	Main Provider				
	Vodafone	O2	Meteor	3	E-mobile
Dublin	21%	24%	25%	10%	7%

3 share in city area is lower with Meteor gaining

(Q 6a/b)

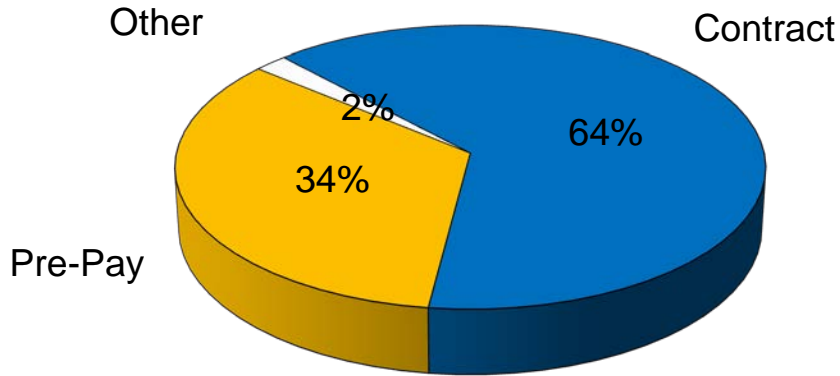


Mobile Broadband Subscription Type

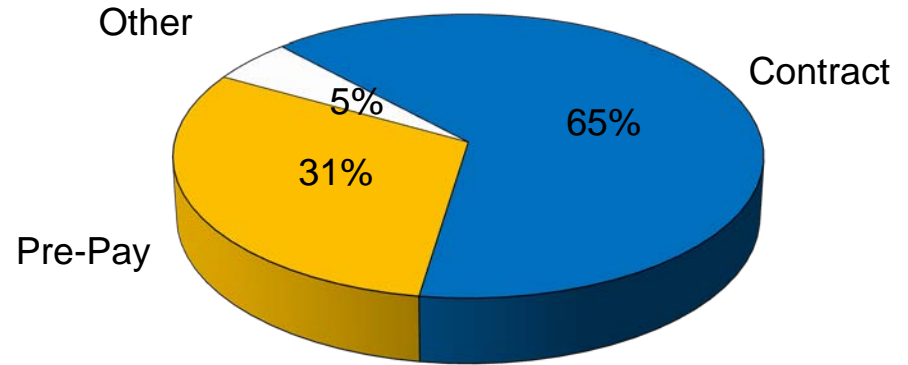
(Base: All With Mobile Broadband – 184, City Sample - 122)



Nationally



City Based



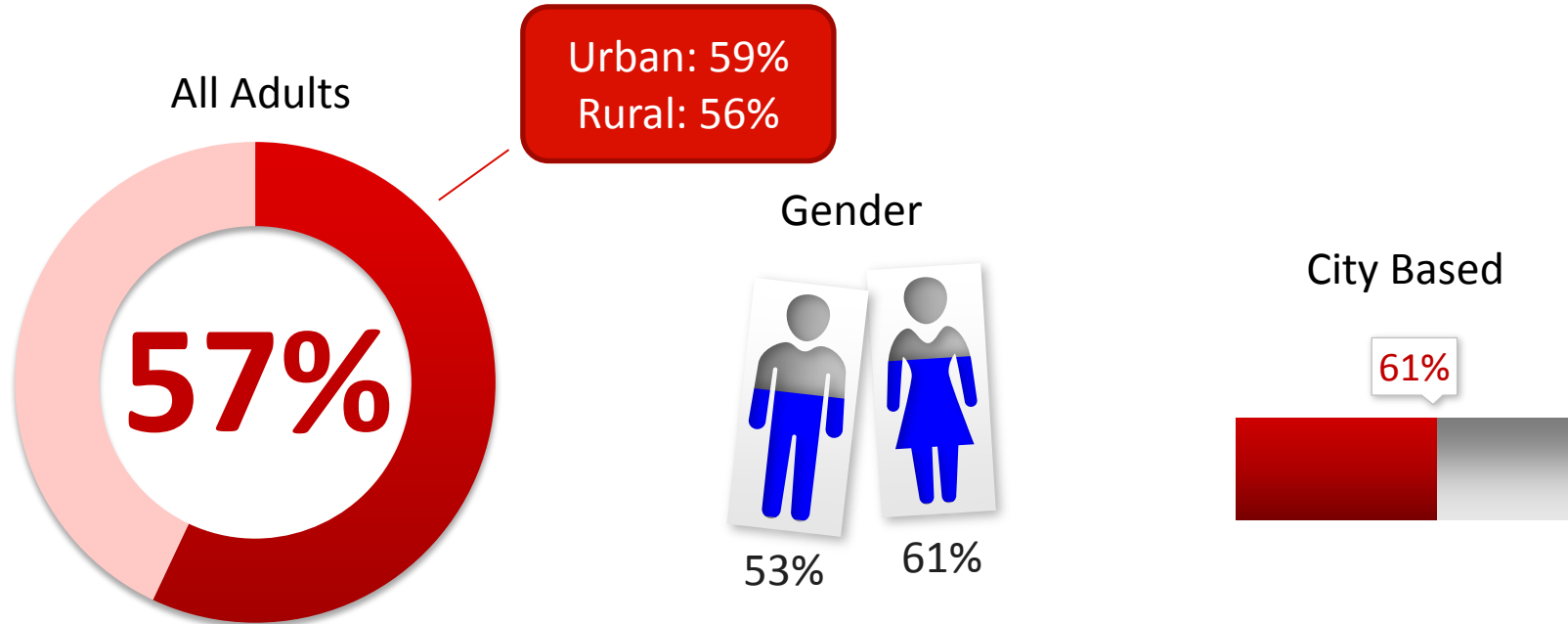
1 in 3 nationally and city based on a pre pay arrangement

(Q 26)



Satisfaction With Mobile Broadband Service

(Base: All Mobile Broadband Users – 184. City Sample - 122)



Satisfaction with mobile broadband service is lower than any of the other services used by consumers

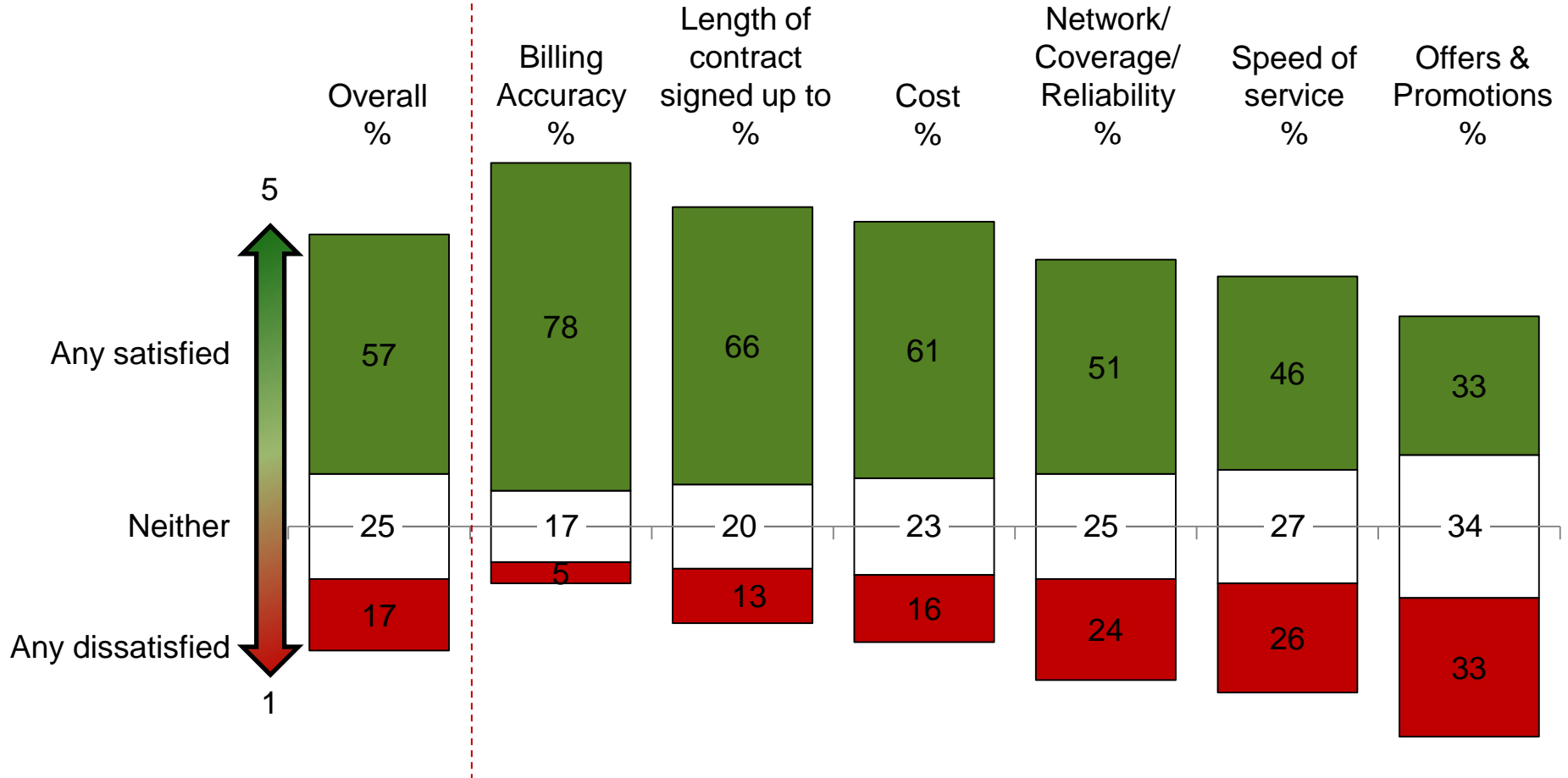
(Q 27a)



Satisfaction With Mobile Broadband Service



(Base: All Mobile Broadband Users – 184)



Satisfaction highest on billing accuracy and lowest on speed of service and offers and promotions ^{b)}

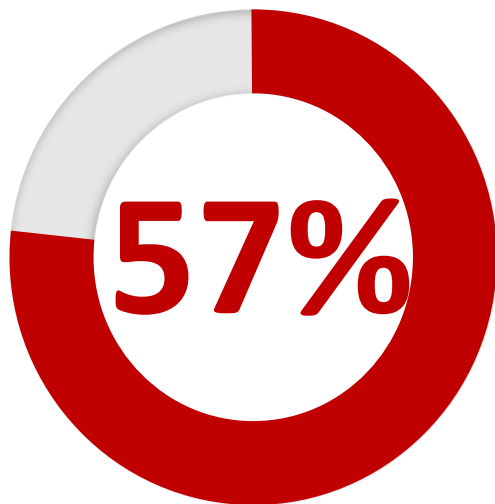


What Aspects Of Service Impact On Overall Satisfaction The Most

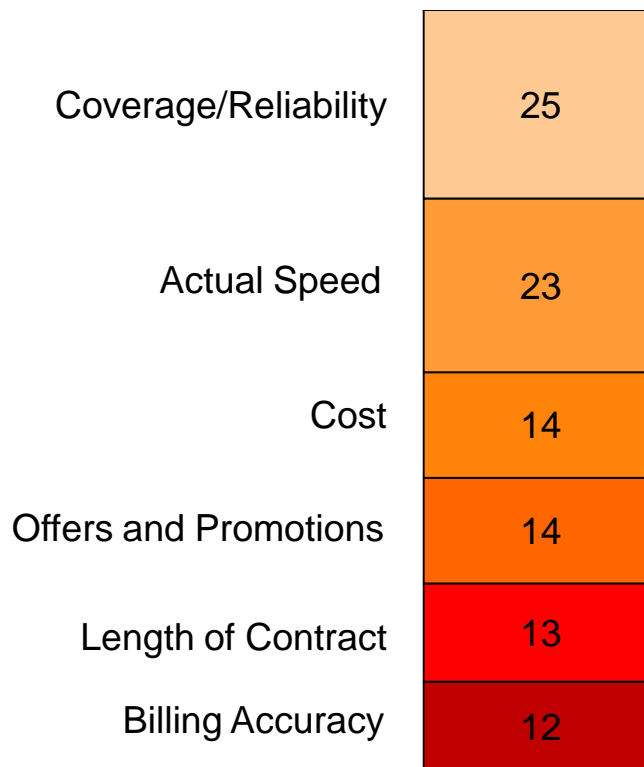
(Base: All Mobile Broadband Users – 184)



Overall Satisfaction



Factors Driving Overall Satisfaction %



Most Important



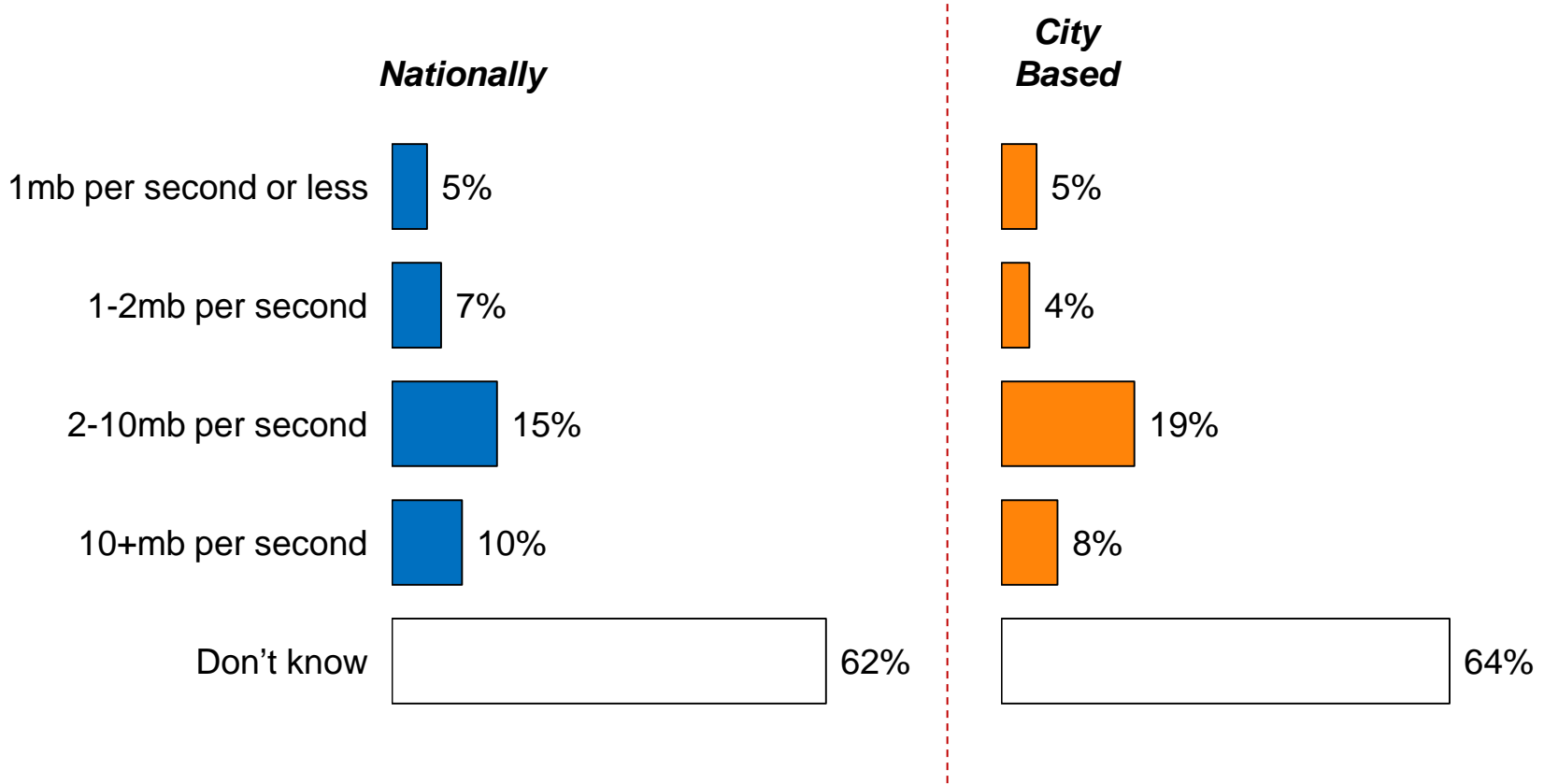
Least Important

A priority area for improvement is coverage/reliability and speed of service experienced

What Is The Download Speed Of Your Mobile Broadband Service?



(Base: All Mobile Broadband Users – 184, City Sample - 122)



Over 3 in 5 are unaware of the download speed of their mobile broadband service

(Q 28)

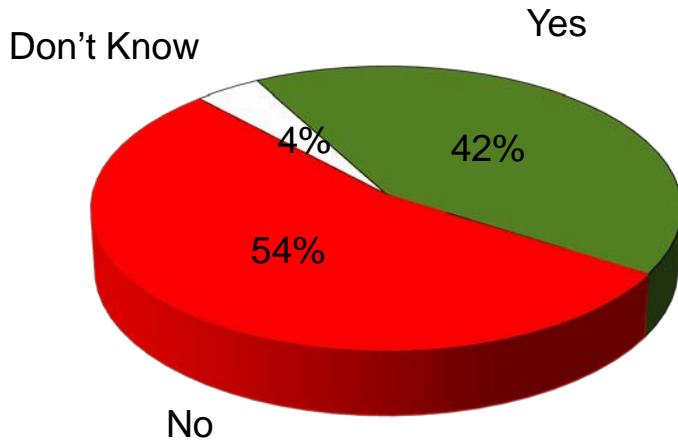


Willingness To Pay More For Higher Speed Mobile Broadband

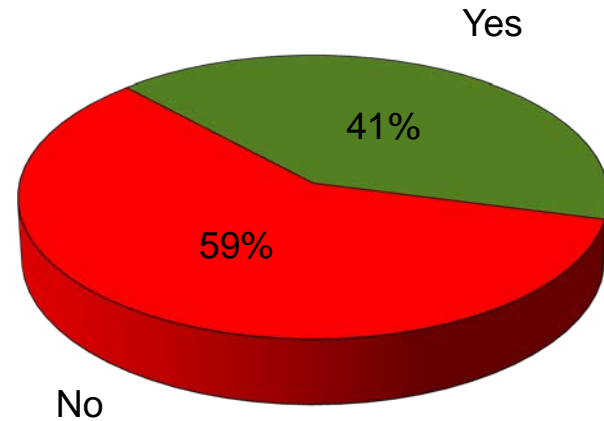


(Base: All Mobile Broadband Users – 184, City Based - 122)

Nationally



City Based



Almost 1 in 2 in the city area say they would be willing to pay more for higher speed mobile broadband

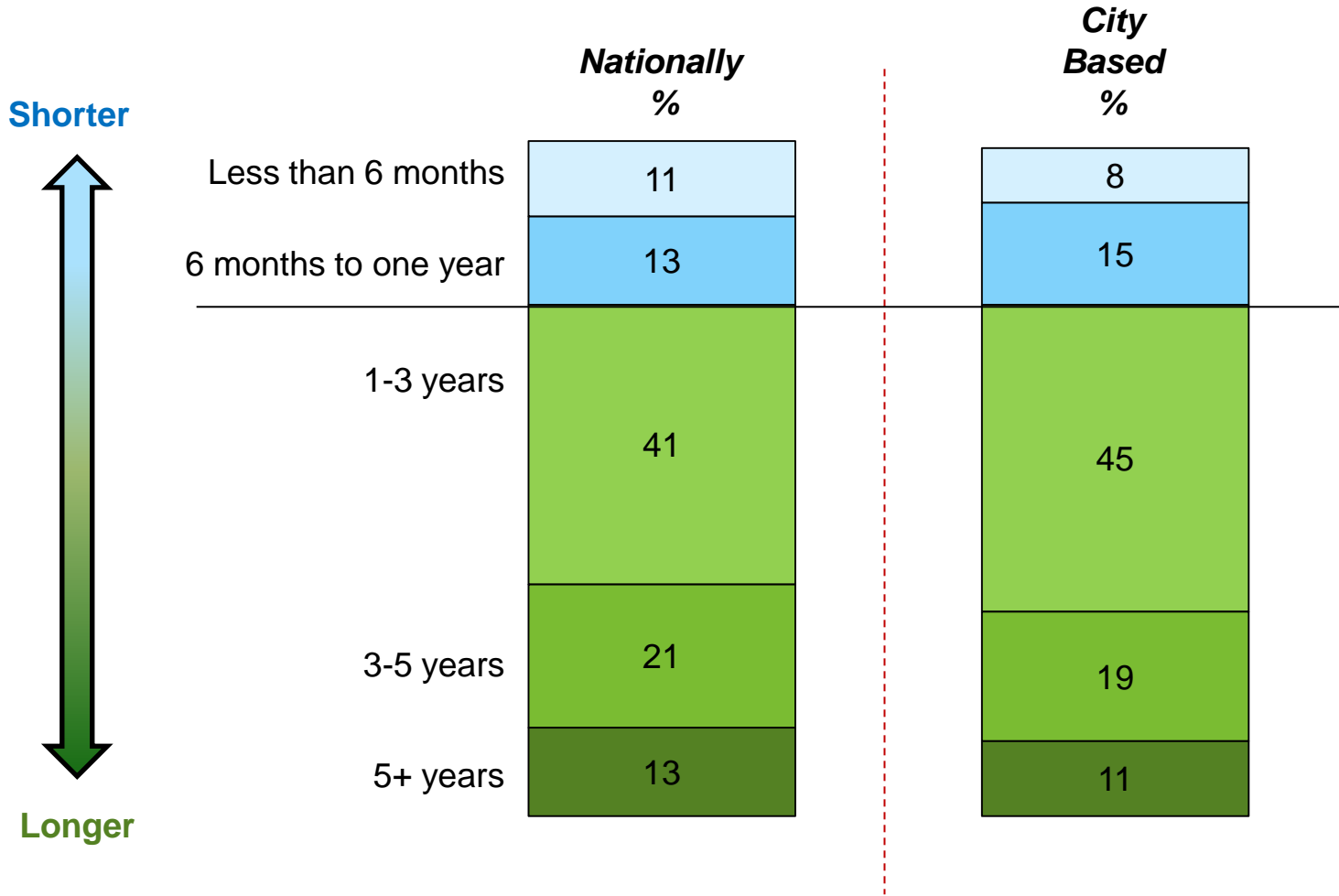
(Q 29)



Length Of Time With Current Provider



(Base: All Mobile Broadband Users – 184, City Based - 122)



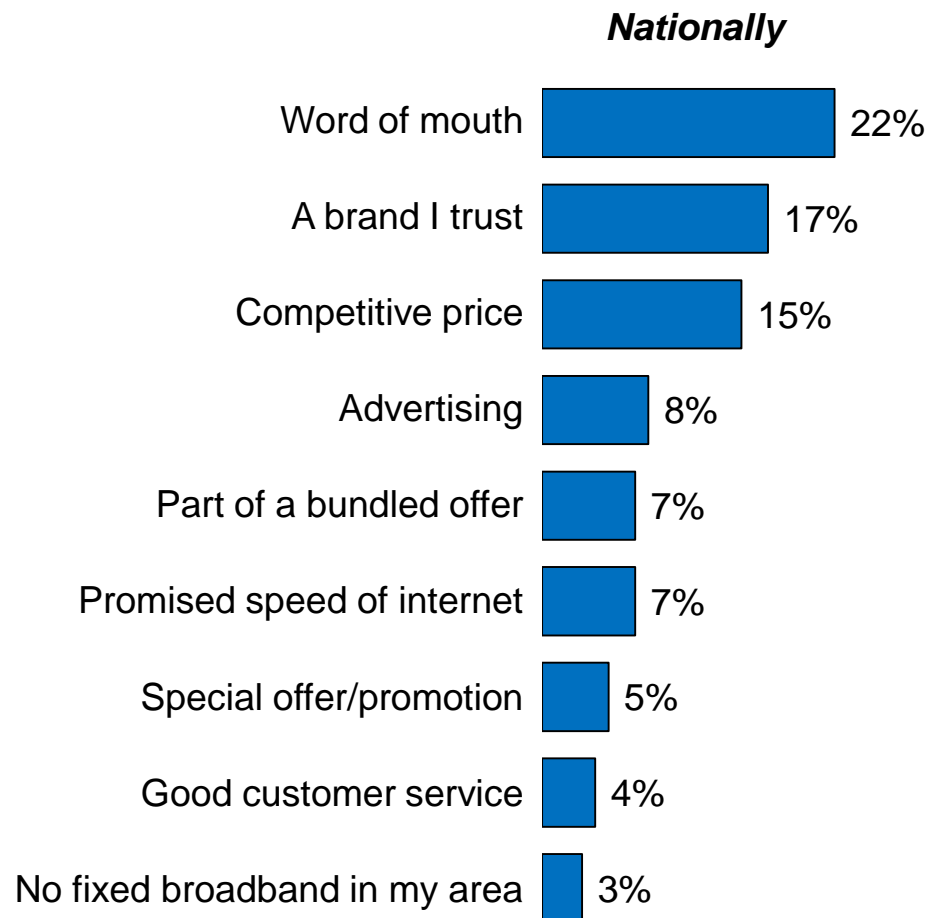
Almost 1 in 4 have been with their current mobile broadband provider for less than a year (Q 30)



What Promoted The Selection Of Mobile Broadband Provider Within Past Year



(Base: All With Mobile Broadband Provider Past 12 Months – 44)



Word and mouth and brand I trust are why most current providers are selected

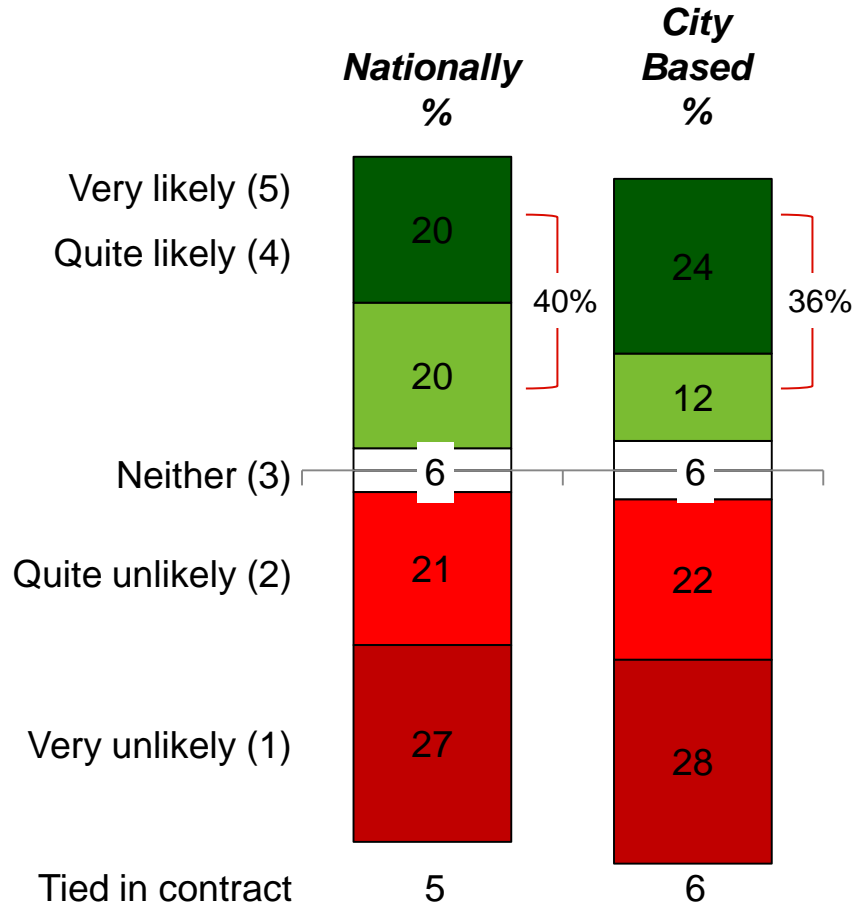
(Q 31)



Consideration Of Switching – Next 12 Months



(Base: All Mobile Broadband Users – 184, City Based - 122)



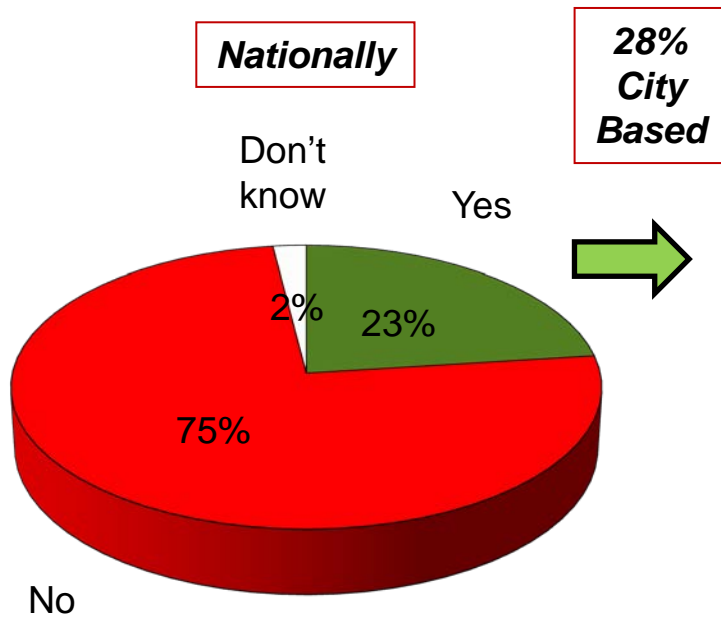
Consideration of switching is high at 2 in 5 of all users planning to switch within the next 12 months



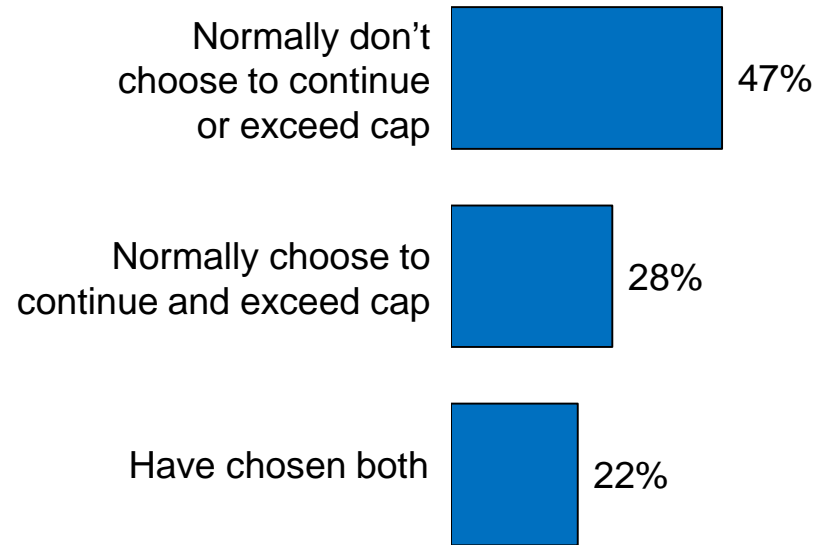
Incidence Of Receiving Text Advising That You Are Close To Data Allowance



(Base: All With Mobile Broadband – 184, City Based - 122)



Impact of Message



Just over 1 in 5 have received a text advising that data allowance is nearly reached

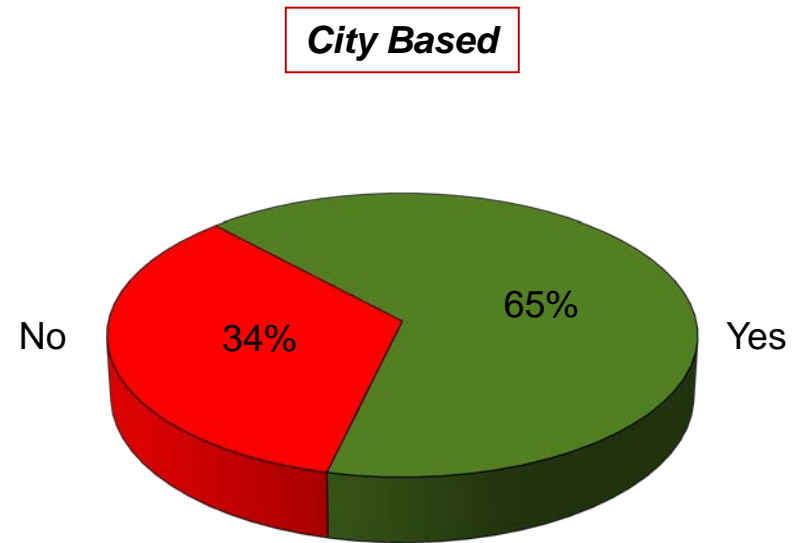
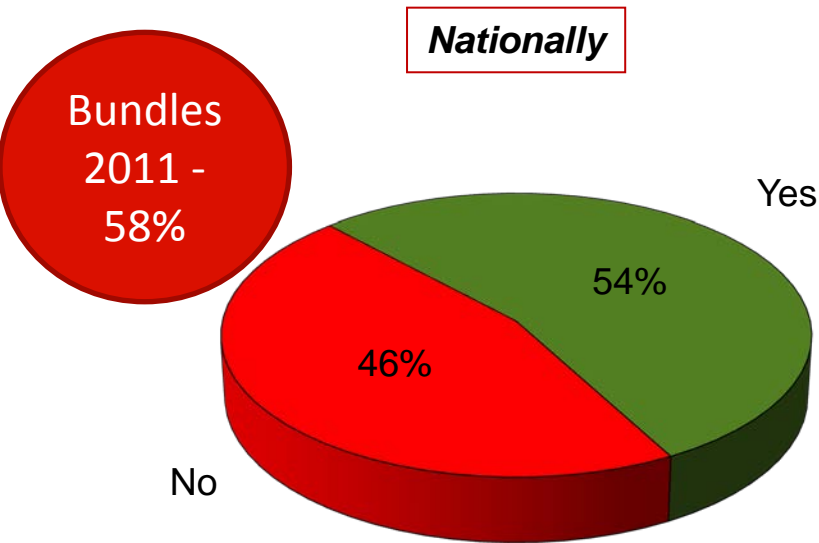
(Q 34/35)



Bundles & Spend

Incidence Of Bundling Any Service

(Base: All Telecommunications Decision Makers – 1,001, 904)

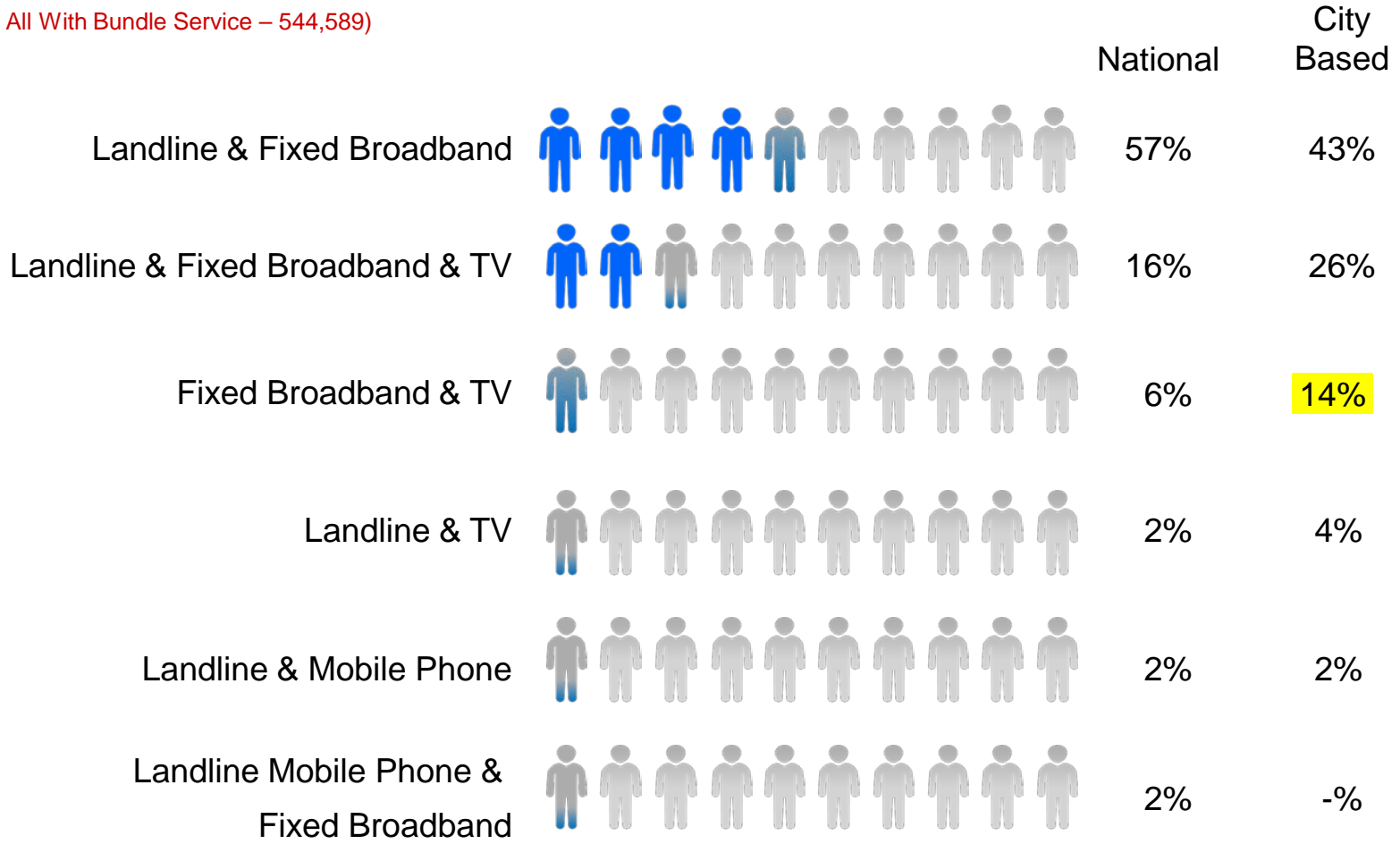


Over half the Irish Population are currently bundling telecommunication services.
Higher in city areas

(Q 9.)

Most Popular Bundles Held

(Base: All With Bundle Service – 544,589)

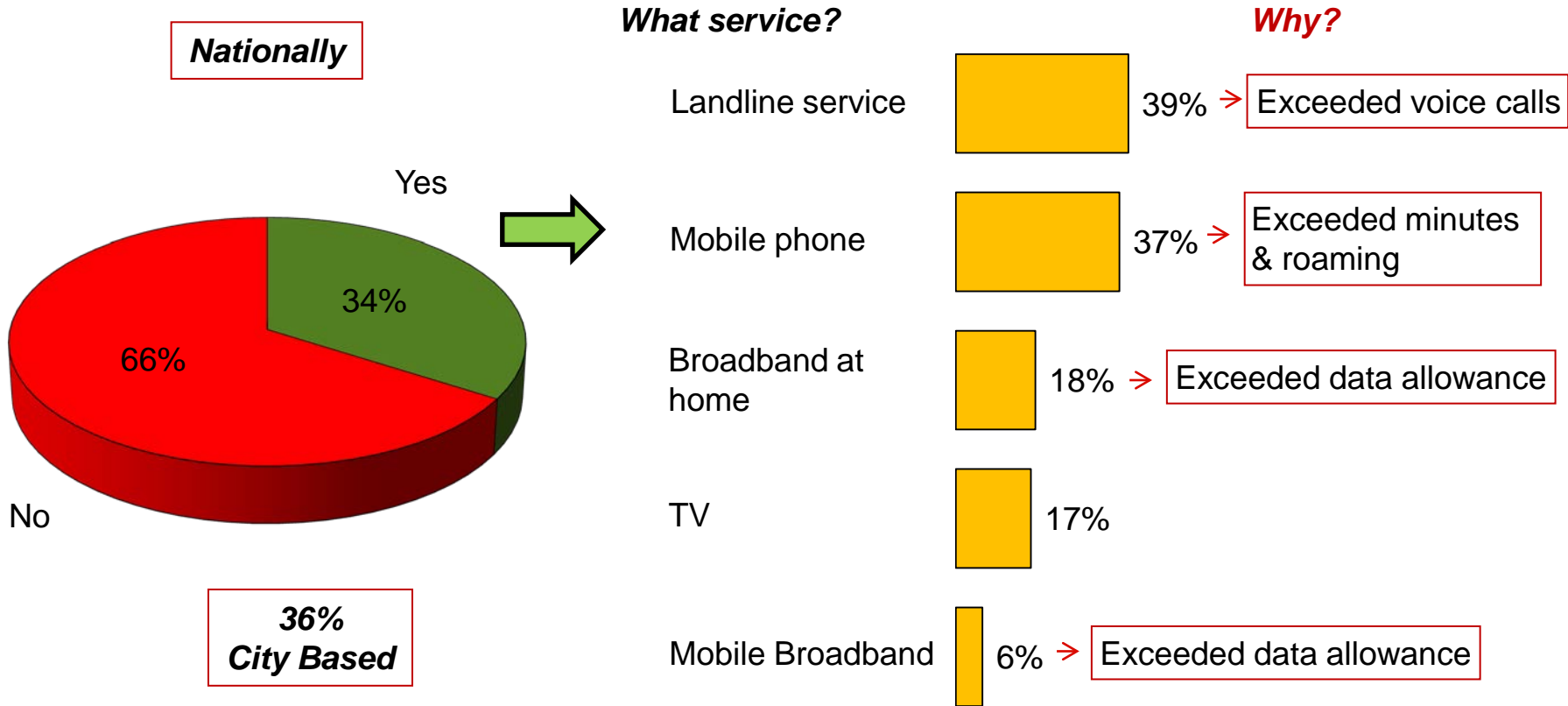


Landline and Fixed Broadband the most popular bundle held with Fixed Broadband and TV
Significantly more popular in city areas

Have You Ever Received A Bill Or Paid More For Telecommunication Service than Expected



(Base: All Telecommunications Decision Makers – 1,001, City Based - 904)



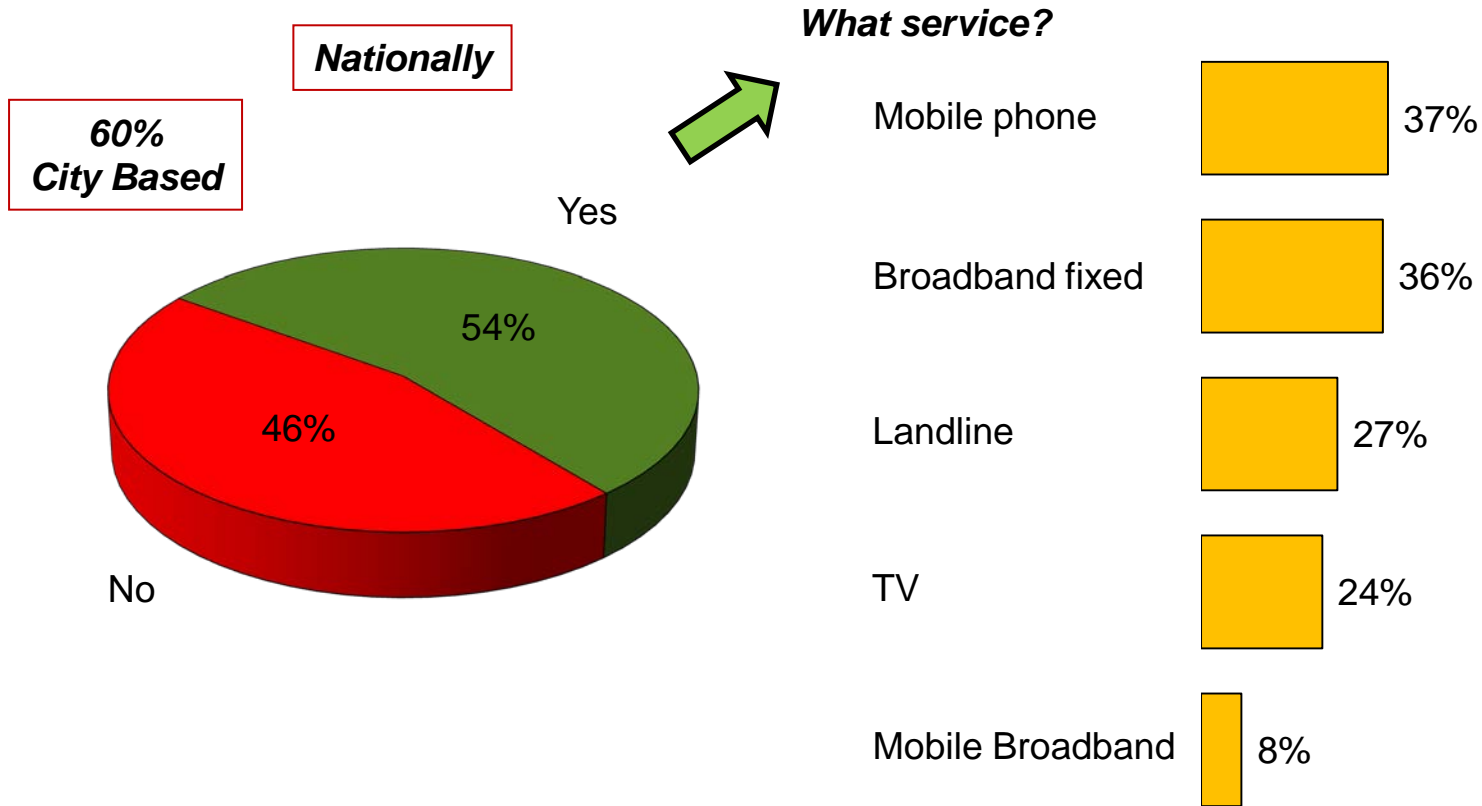
Over 1 in 3 have received a bill or paid more for service than expected

(Q 45-47)

Incidence Of Contacting Customer Service Department Of Telecoms Provide – Past 12 Months



(Base: All Telecommunications Decision Makers – 1,001 City Based - 904)



Over half the population have called a customer service department within the past 12 months (9)



Key Insights



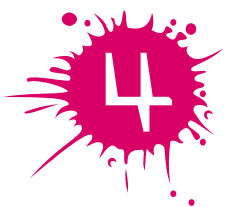
Broadband at home access has stayed at the same rate since 2011 at 78% of the population. The majority of those without access do not want broadband at home but 2 in 5 are not using for a variety of issues such as access problems and cost. Smartphone internet access is also used as an alternative. Young and Free households are least likely to have a landline and most likely to have mobile broadband.



Satisfaction with mobile broadband service is considerably lower than among fixed or any other telecommunications service. In order to improve satisfaction in this area network operators need to improve network coverage/reliability and speed of service. Over 2 in 5 mobile broadband users state that they are willing to pay more for higher speeds. As a result of the current low satisfaction levels intention to switch in this market is high.



Fixed broadband reports higher satisfaction levels than mobile broadband however is low for the New Family segment who have the highest likelihood of switching provider. Speed of service is the main focus for network operators to improve satisfaction, while competitive price is the main driver of changing provider in this market. Fewer consumers are willing to pay more to ensure faster speeds than we witnessed in mobile broadband.



The mobile market continues to increase its share of contracts v prepay with contract now in excess of 2 in 5 mobile owners. Satisfaction with mobile phone service is high, with lowest intention of switching, however network providers need to focus on cost and improving the quality of internet coverage on handsets. Smartphone ownership has remained static from 2011 – 4 in 5 in the young and free segment are Smartphone owners.

Key Insights



Eircom continue to dominate the landline market yet have less presence in city areas and have the same share as UPC in Dublin. The Young and Free segment show lower satisfaction for landline service and have a higher intention to switch. This group are more likely than others to use their landline service to assess broadband services. While satisfaction network operators need to focus on cost and contract lengths in order to improve customer satisfaction further.



Almost half of those in the city sample have heard of ComReg when prompted however usage of the main ComReg site is relatively low at 12%. The city sample have a higher incidence of being overcharged and calling customer service departments of telecoms providers in the past 12 months.



The incidence of bundling telecoms service remains unchanged over time at 54% and is higher in city areas – perhaps driven by wider availability of TV and broadband providers in these areas. Landline with fixed broadband is the most popular bundle type.