

Residential Telecommunications Survey

Quarterly Report

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Introduction

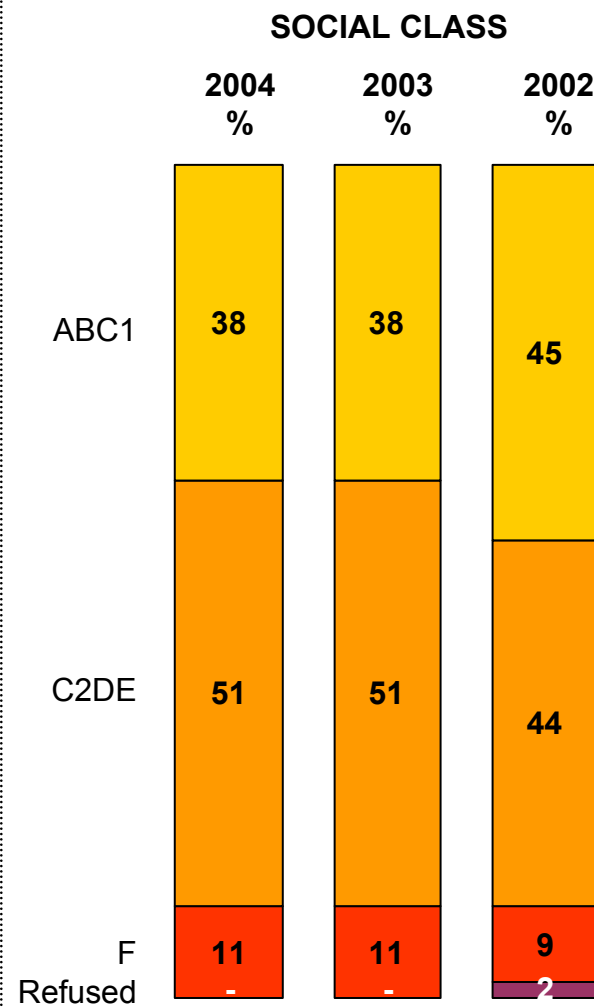
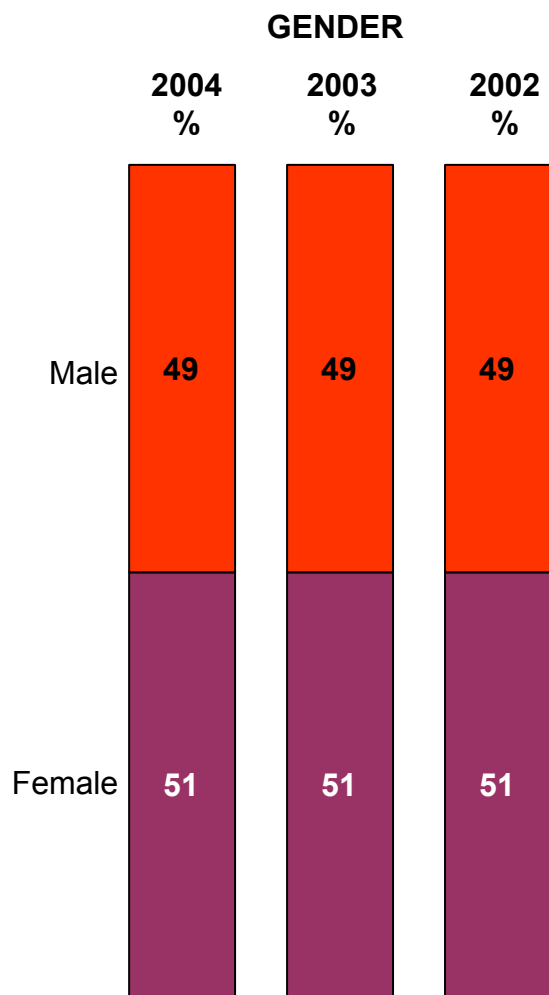
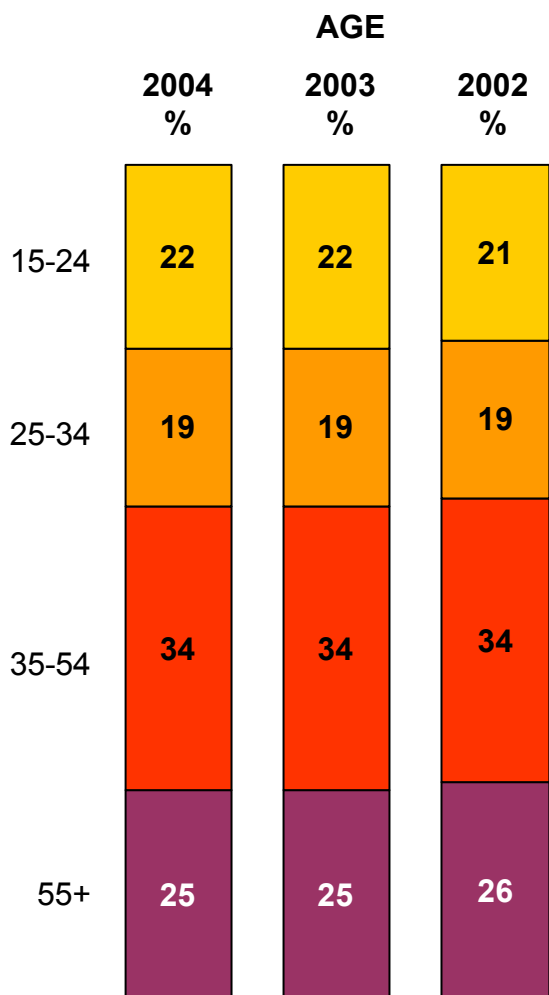
Introduction

- A telecommunications survey is conducted annually on behalf of the Commission for Communications Regulation (ComReg), amongst a nationally representative sample of the general public in the Republic of Ireland.
- The survey measures consumer usage, attitudes and satisfaction trends in the areas of residential landline services and the mobile market, as well as general attitudes to telecommunications. This year, sections new to the survey include pay phone services and directory enquiry services.
- This summary report reviews the findings of the 2004 survey, conducted by TNS MRBI.
- 516 CATI (Computer Assisted Telephone Interviews) were conducted with adults aged 15 and over with a landline telephone in the household, with quotas placed on sex, age, social class and region to ensure representation of the adult population.
- Fieldwork was conducted from 29th January – 5th February, 2004.

Findings

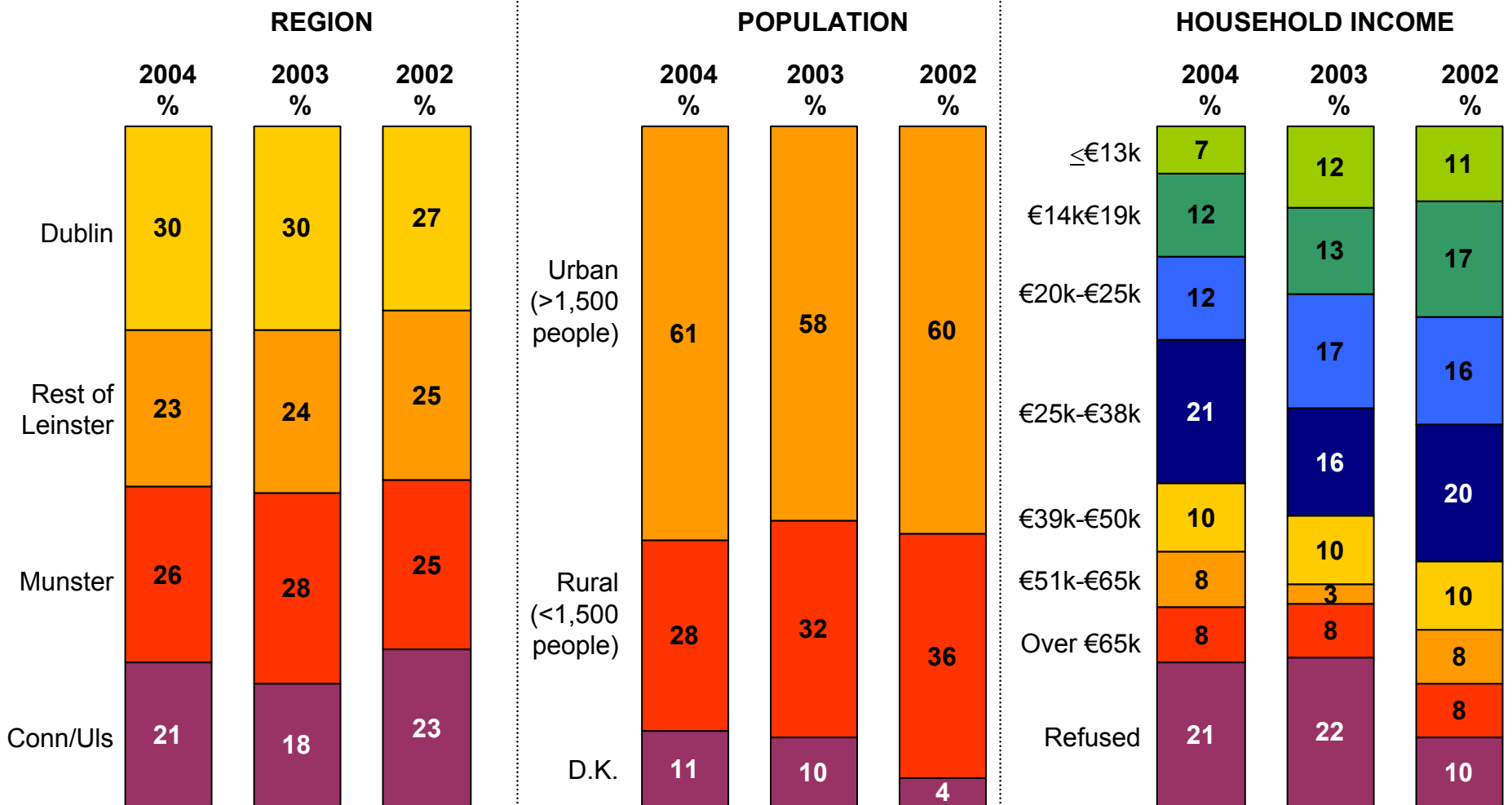
Respondent Profile (I)

Base: All Respondents: 516



Respondent Profile (II)

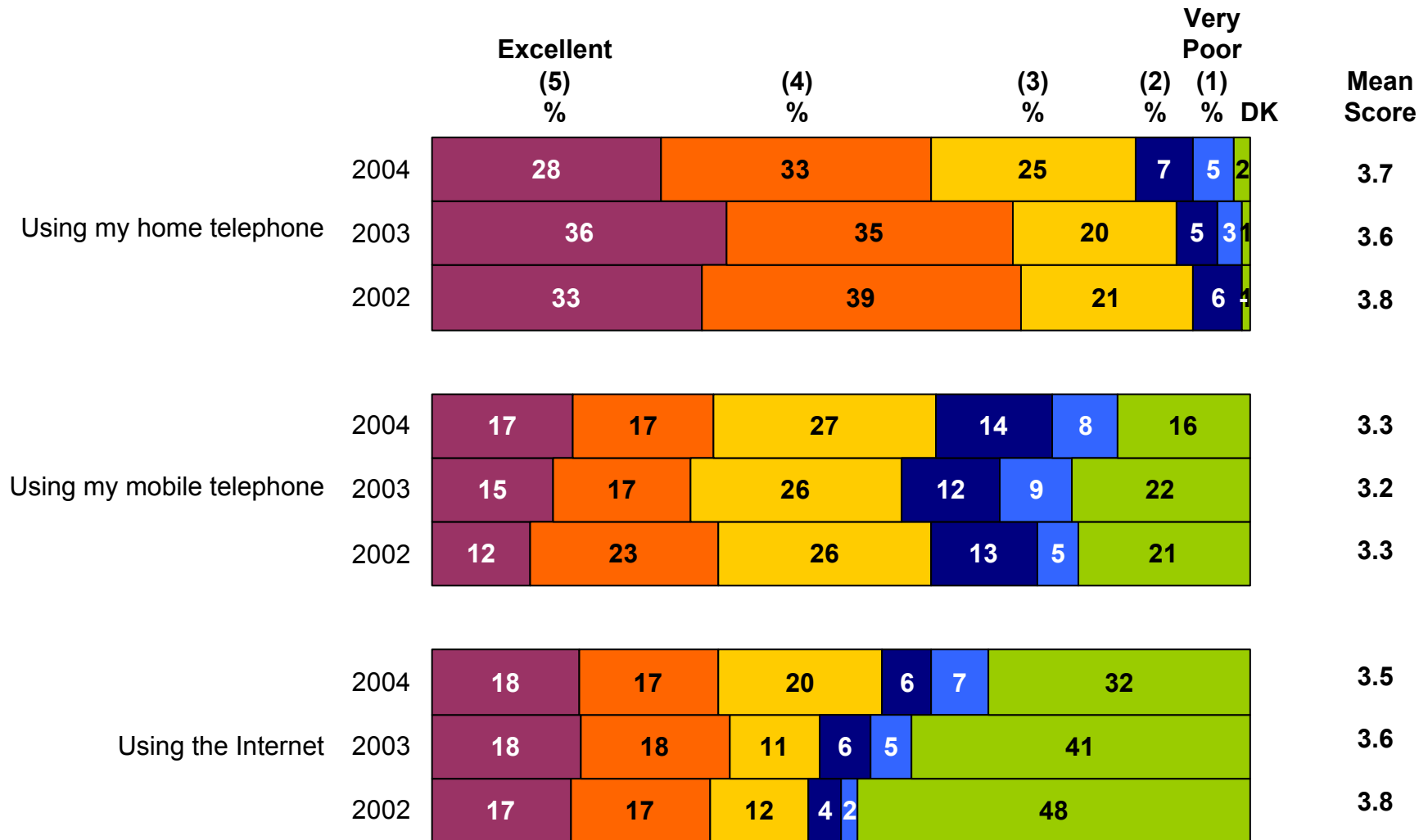
Base: All Respondents: 516



General Attitudes Towards Telecommunications

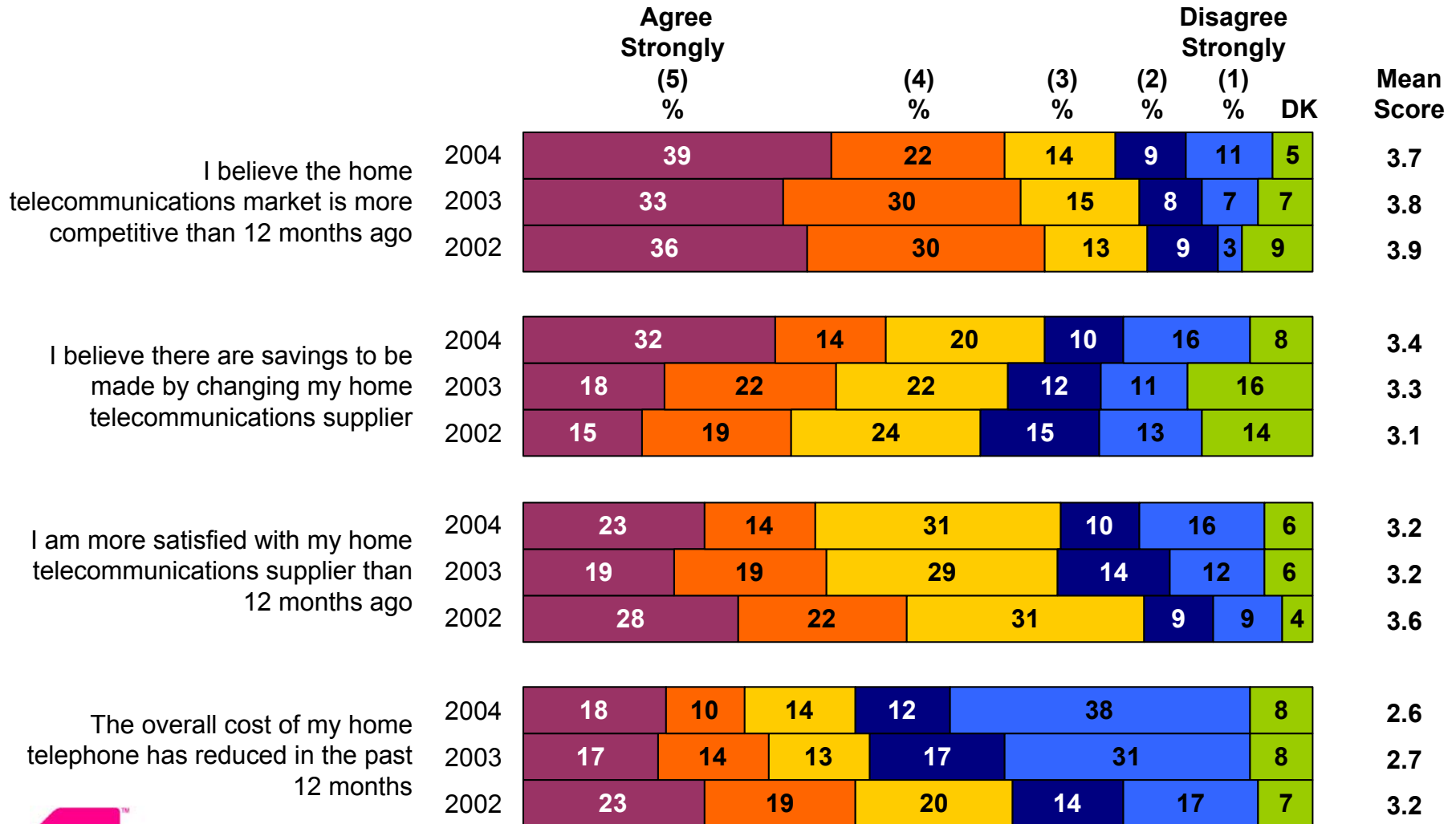
Rating Of Services For Value For Money

Base: All Respondents: 516



Agreement With Statements Relating To The Telecommunications Market

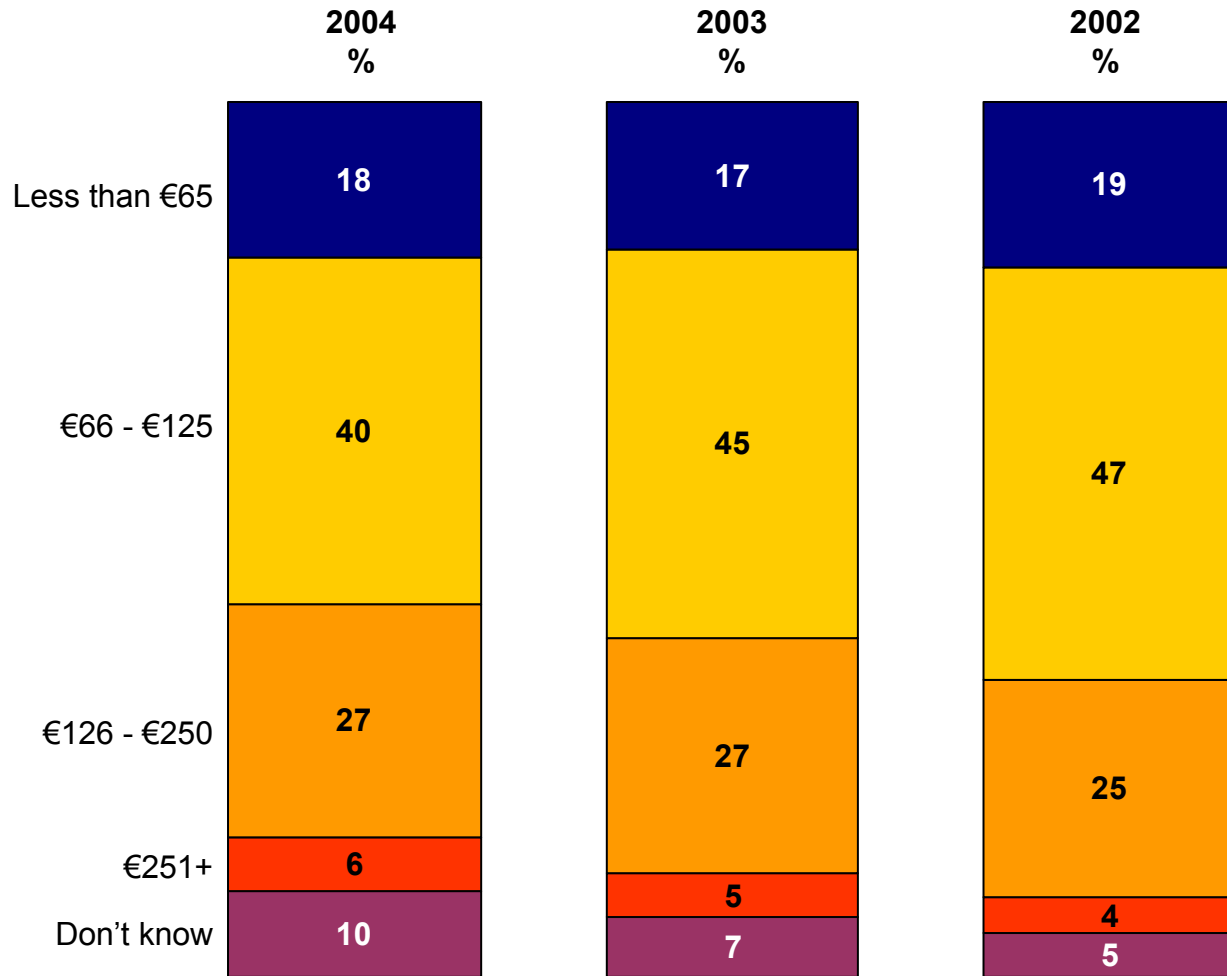
Base: All Respondents: 516



Fixed Line Sector

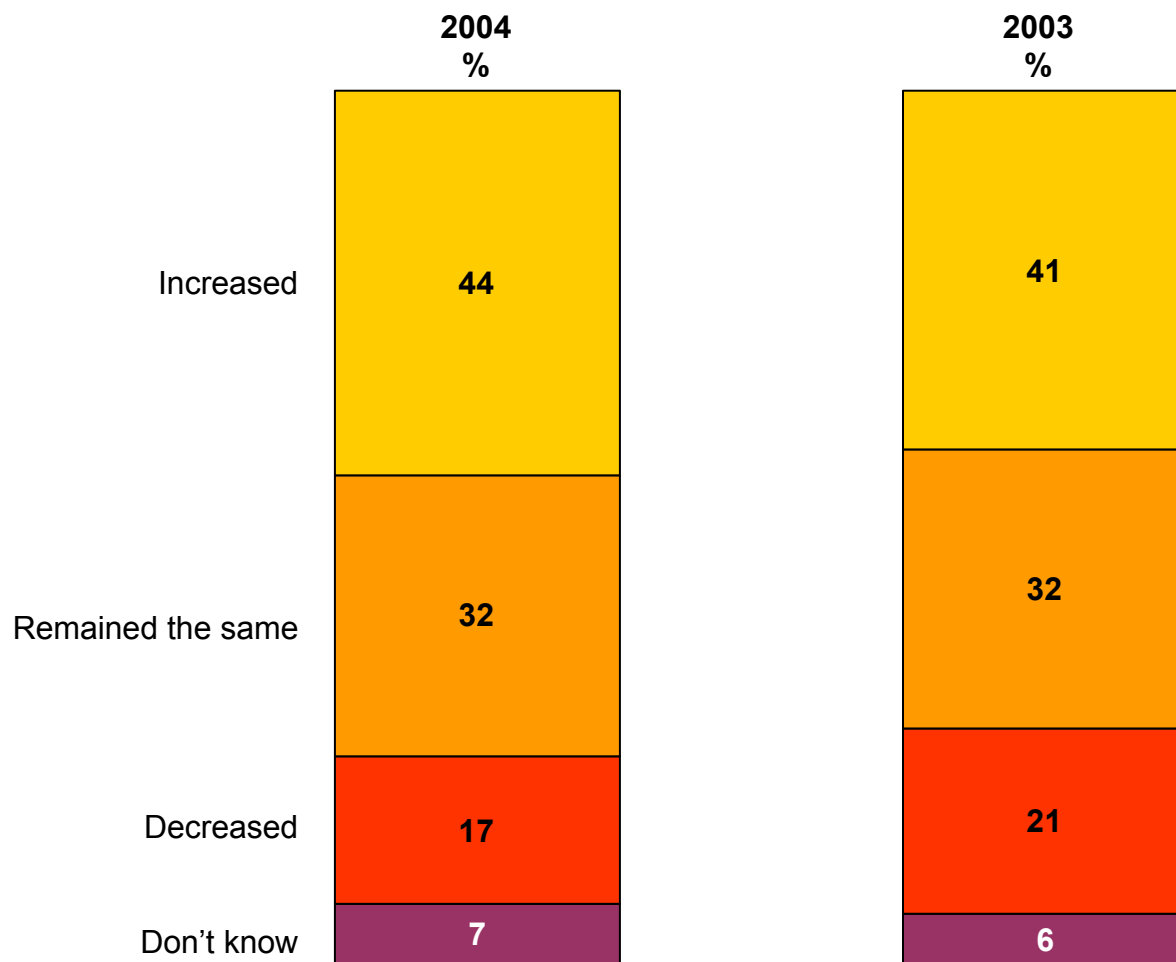
Average Bi-Monthly Telephone Bill

Base: All Respondents: 516



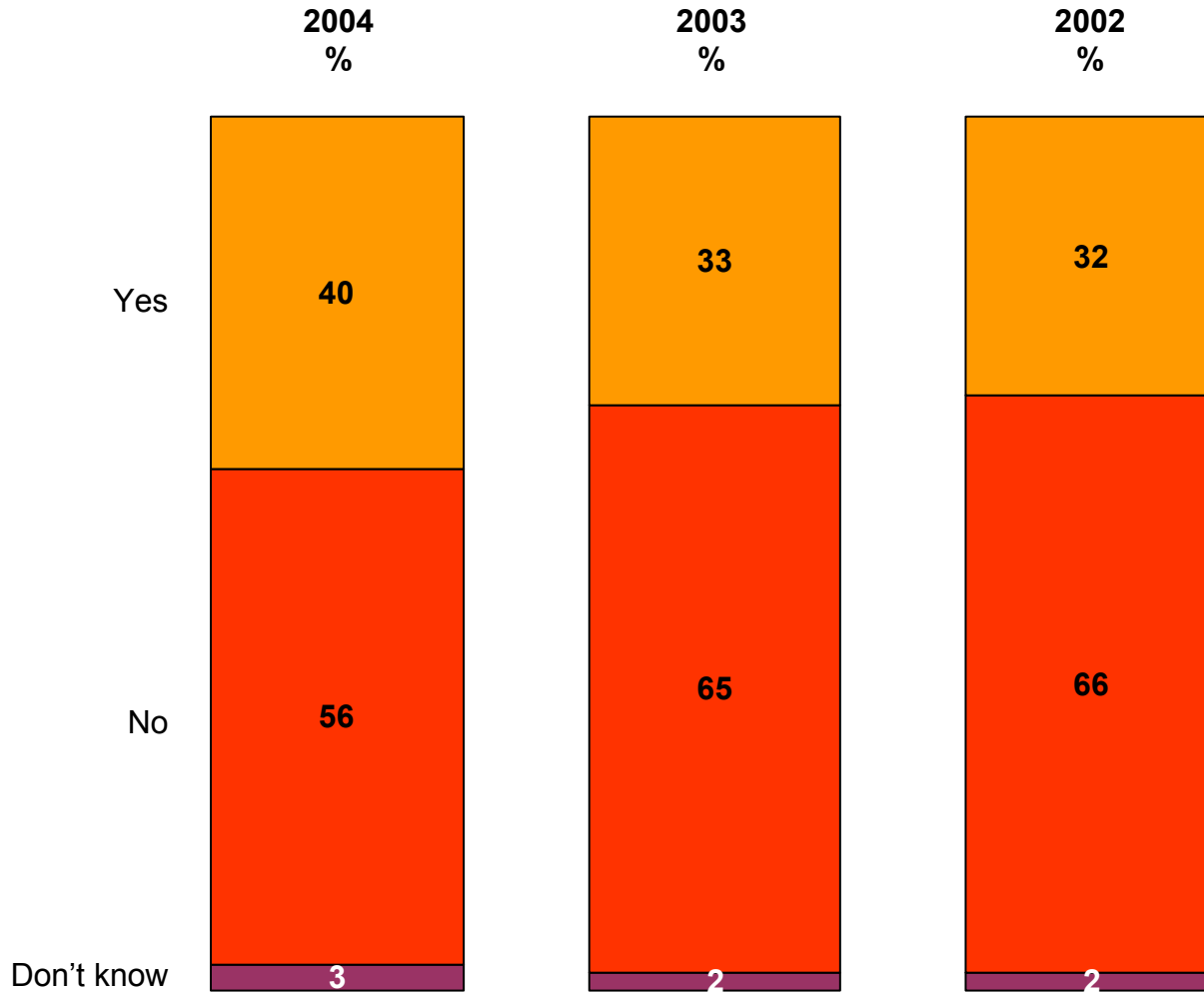
Change In Telephone Bill Amount Over The Past Two Years

Base: All Respondents: 516



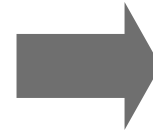
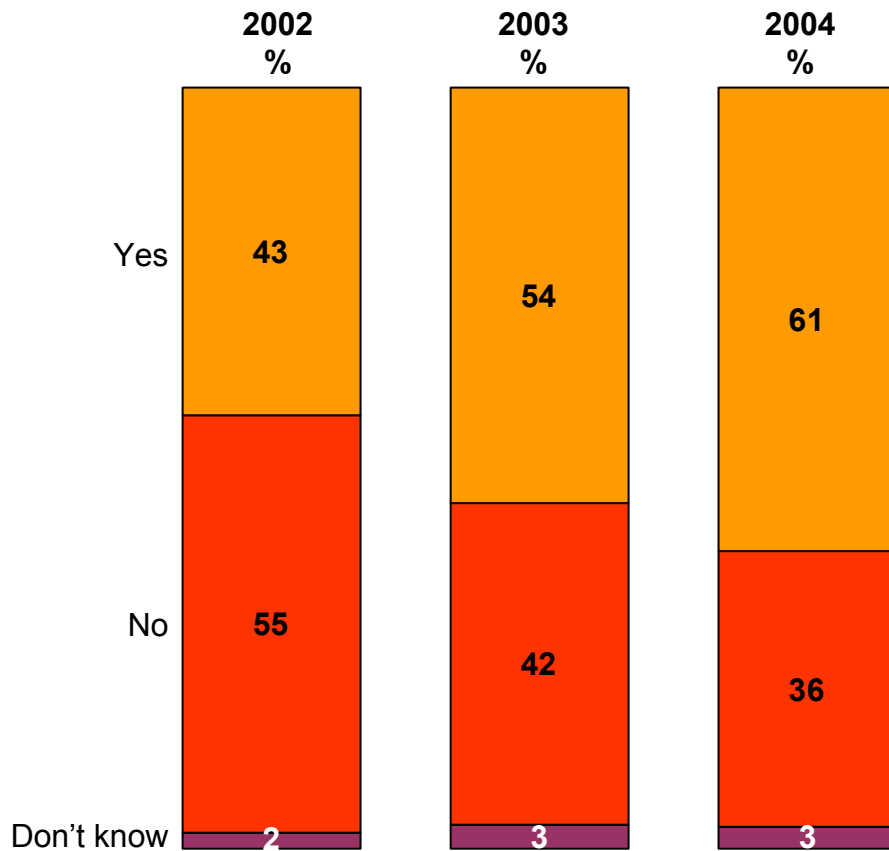
Awareness Of Carrier Pre-Selection

Base: All Respondents: 516



Ever Been Approached By Telecommunications Suppliers Other Than eircom

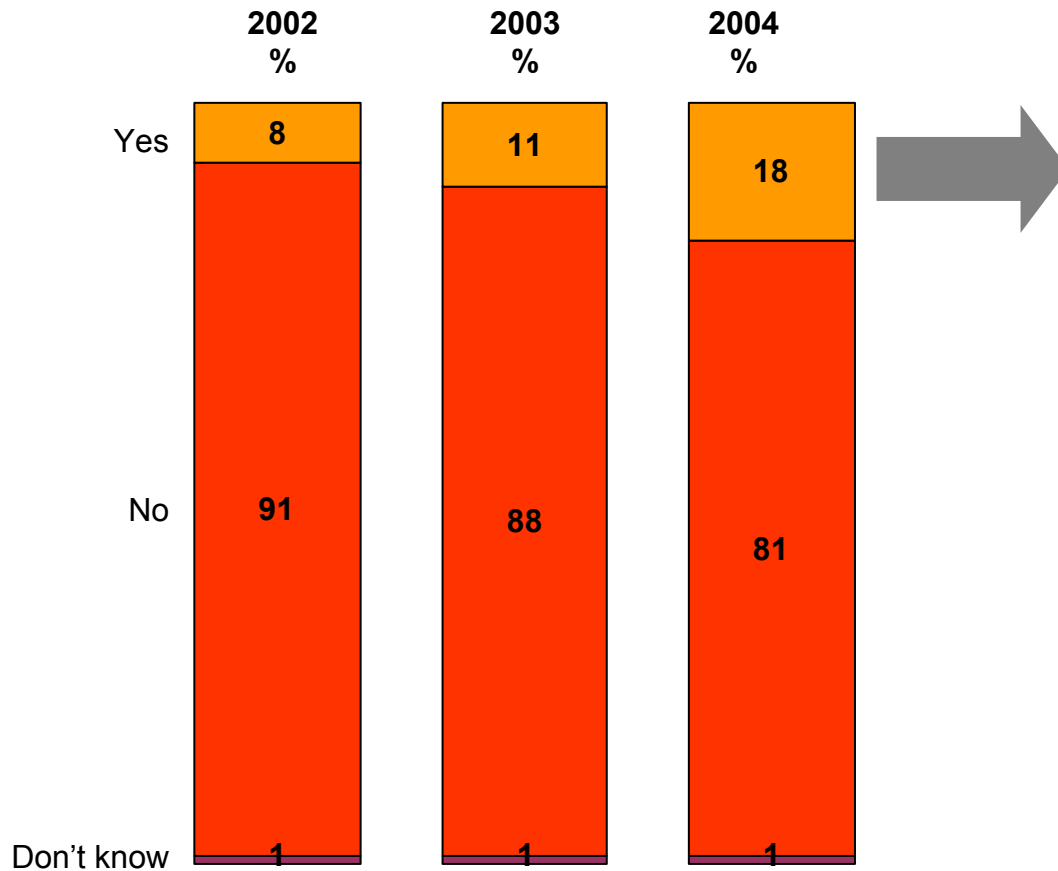
Base: All Respondents: 516



How Approached	
Base: 317	
	%
Received a call from the company	47
Salesperson knocked on my door	27
Advertisement or other promotional material received in the post	25
Heard from a friend/word of mouth	2
E-mail	1
I/we approached them	1
Other	2
Don't know	2

Telecommunications Suppliers Used Other Than eircom For Landline Calls

Base: All Respondents: 516



Supplier Currently Use
Base: 96

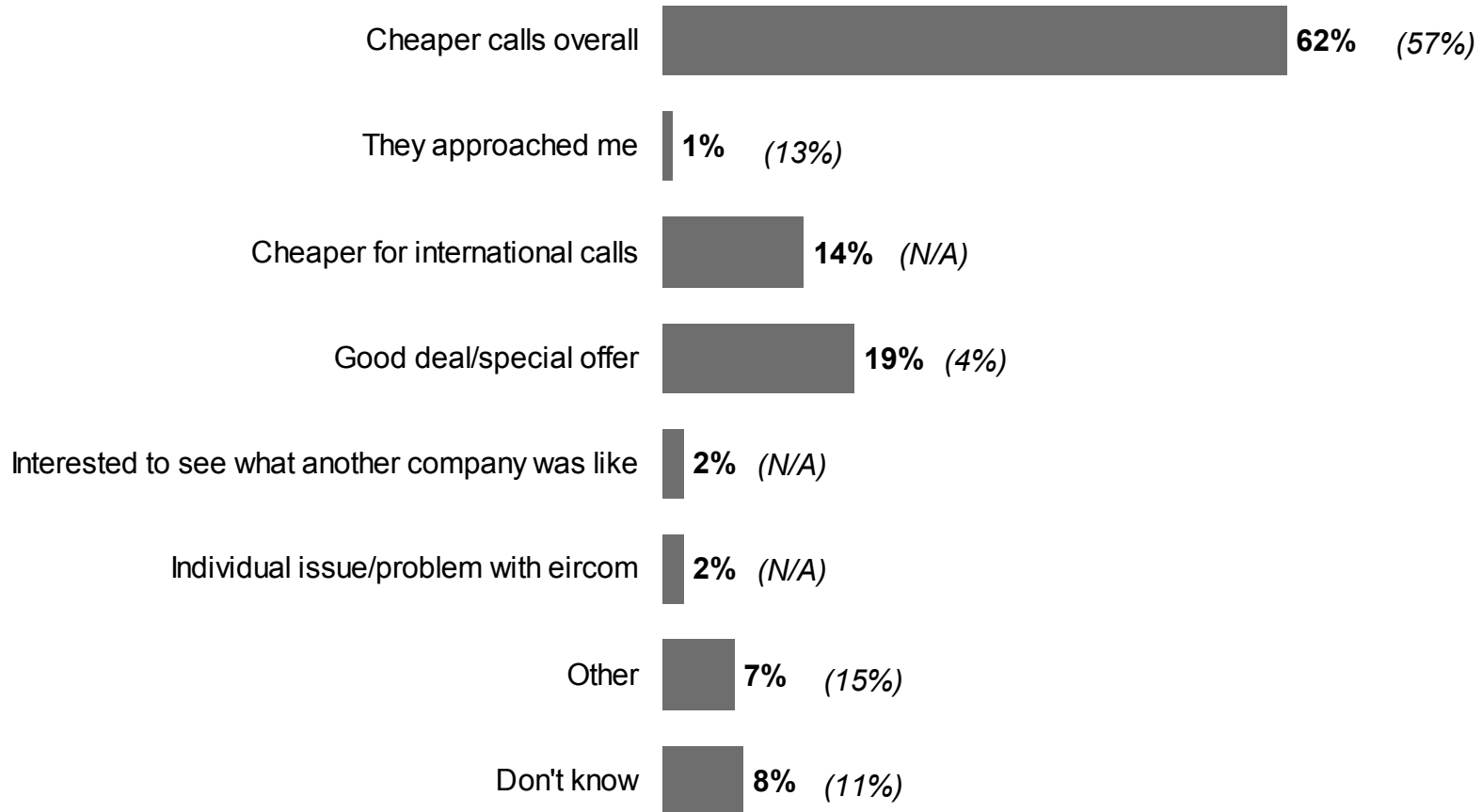
	2004 %	2003 %	2002 %
Esat BT	10	23	36
Euphony	10	13	12
Spirit	-	10	19
Newtel	3	9	-
Swiftcall	6	5	10
Other*	51	15	14
Don't know	20	25	24

How Became Aware Of Supplier
Base: 96

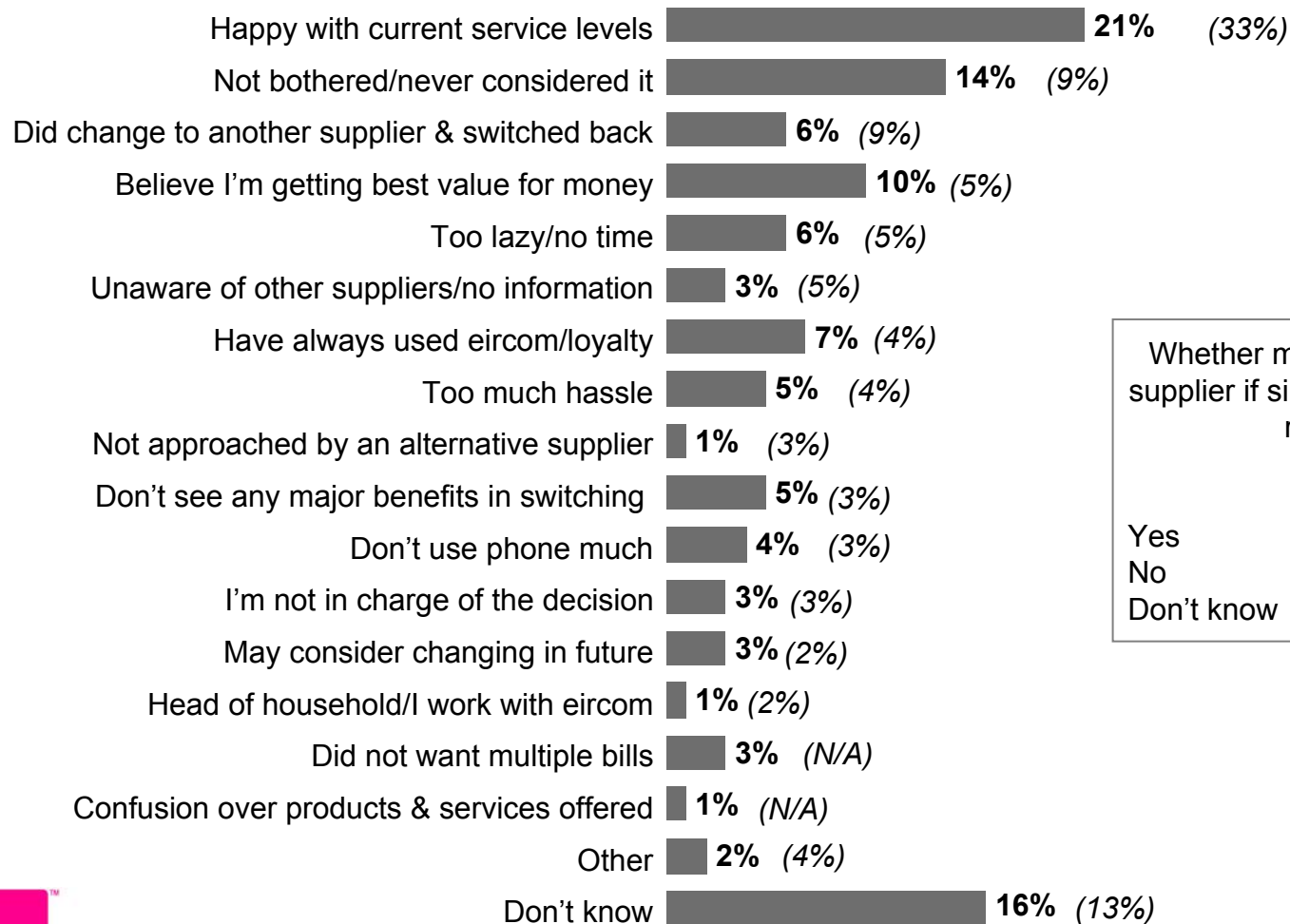
	%
Ad or other promotional material received in post	30
Salesperson knocked on door	21
Heard from a friend/word of mouth	20
Received a call from the company	16
Via the Internet/e-mail	8
TV or radio ad	4
Other	6
Don't know	4

Main Reasons For Switching Supplier Of Home Telephone Services From eircom

Base: All using a supplier other than eircom for fixed line telephone: 96



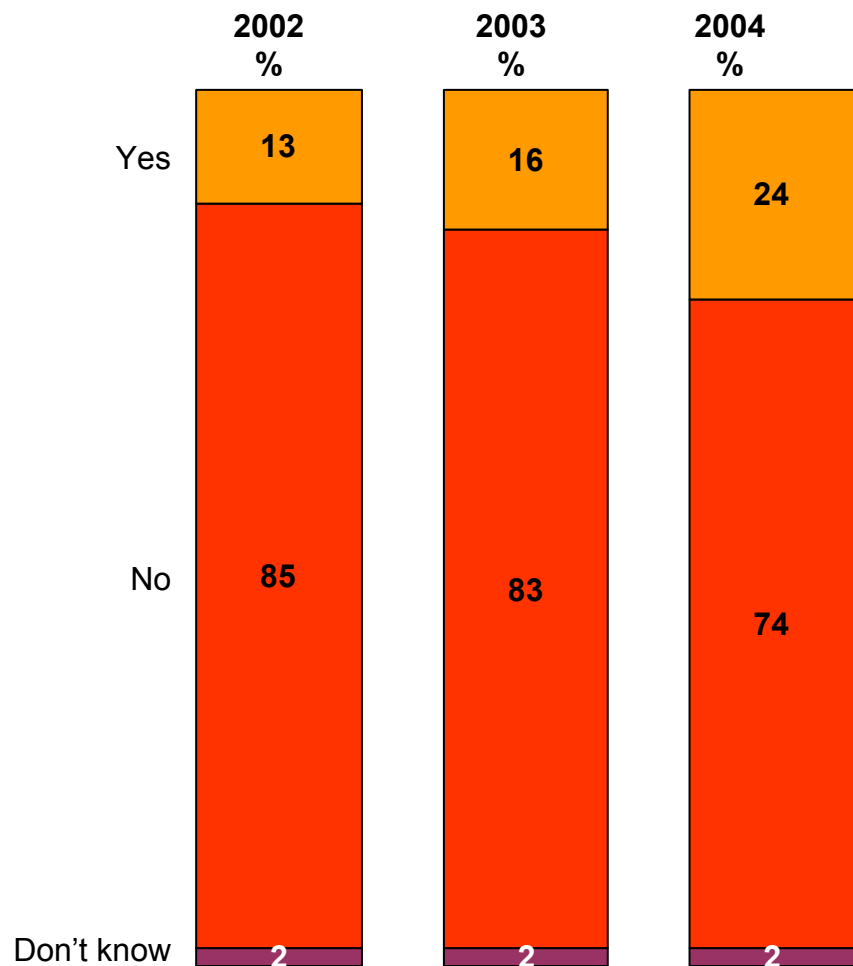
Reasons For Not Considering A Change In Supplier Base: All not using a supplier other than eircom for fixed line telephone: 420



Whether more inclined to change supplier if single bill received for line rental & calls	
	%
Yes	51
No	38
Don't know	11

Whether Switched Back To eircom & Reasons Why

Base: All not using a supplier other than eircom for their fixed line calls: 420

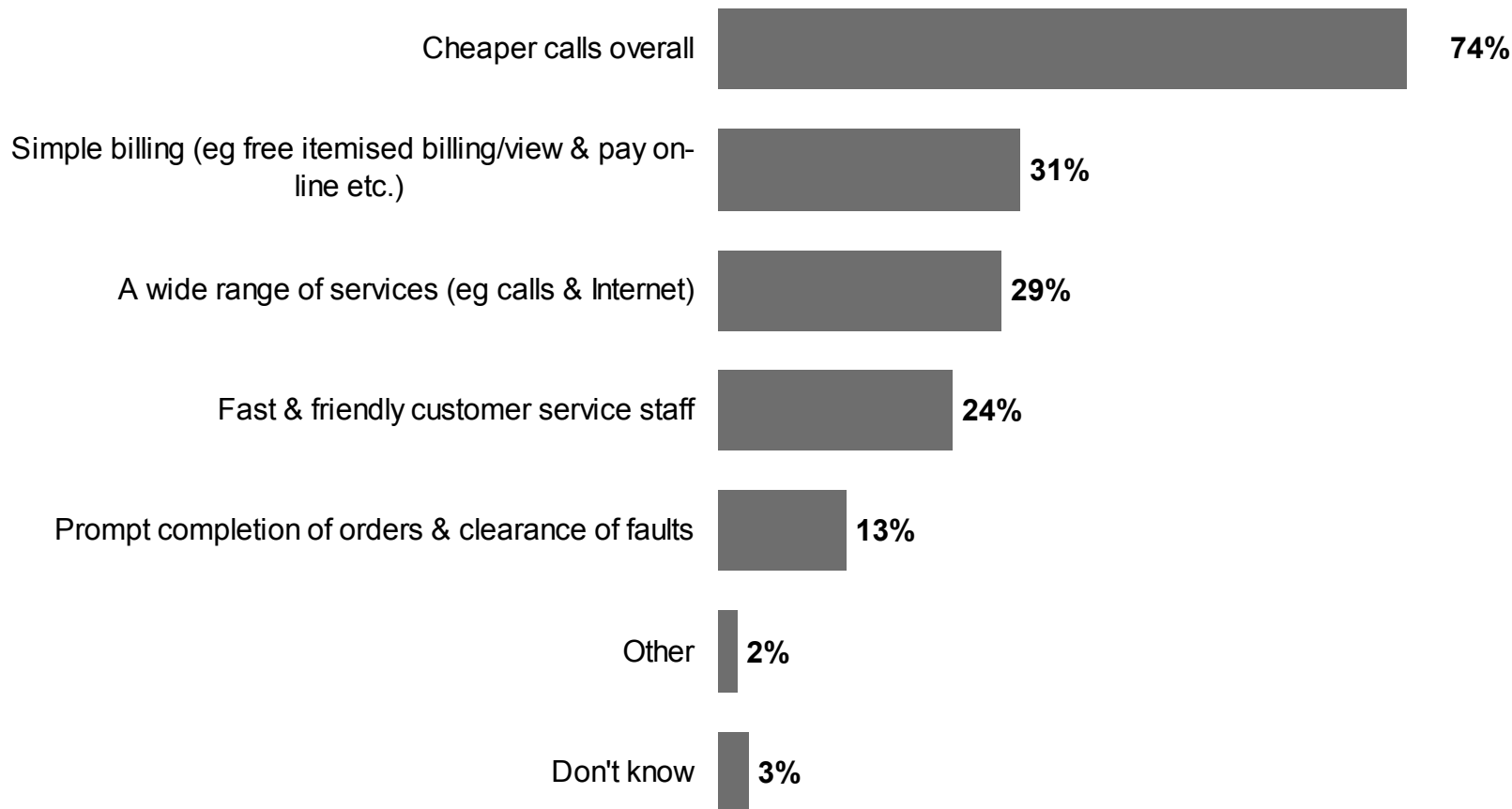


Main Reasons For Switching Back to eircom
Base: 102

	2004 %	2003 %
Found having two bills awkward	23	(18)
Price/costs became too expensive	20	(N/A)
Cheaper calls overall	16	(32)
Good products/services	4	(N/A)
Efficiency/billing procedure/installation	10	(N/A)
Good deal/special offer	9	(6)
eircom are more reliable overall	4	(7)
They approached me	4	(5)
Less hassle	1	(5)
Offered as part of an overall package	1	(3)
Other	12	(19)
Don't know	8	(4)

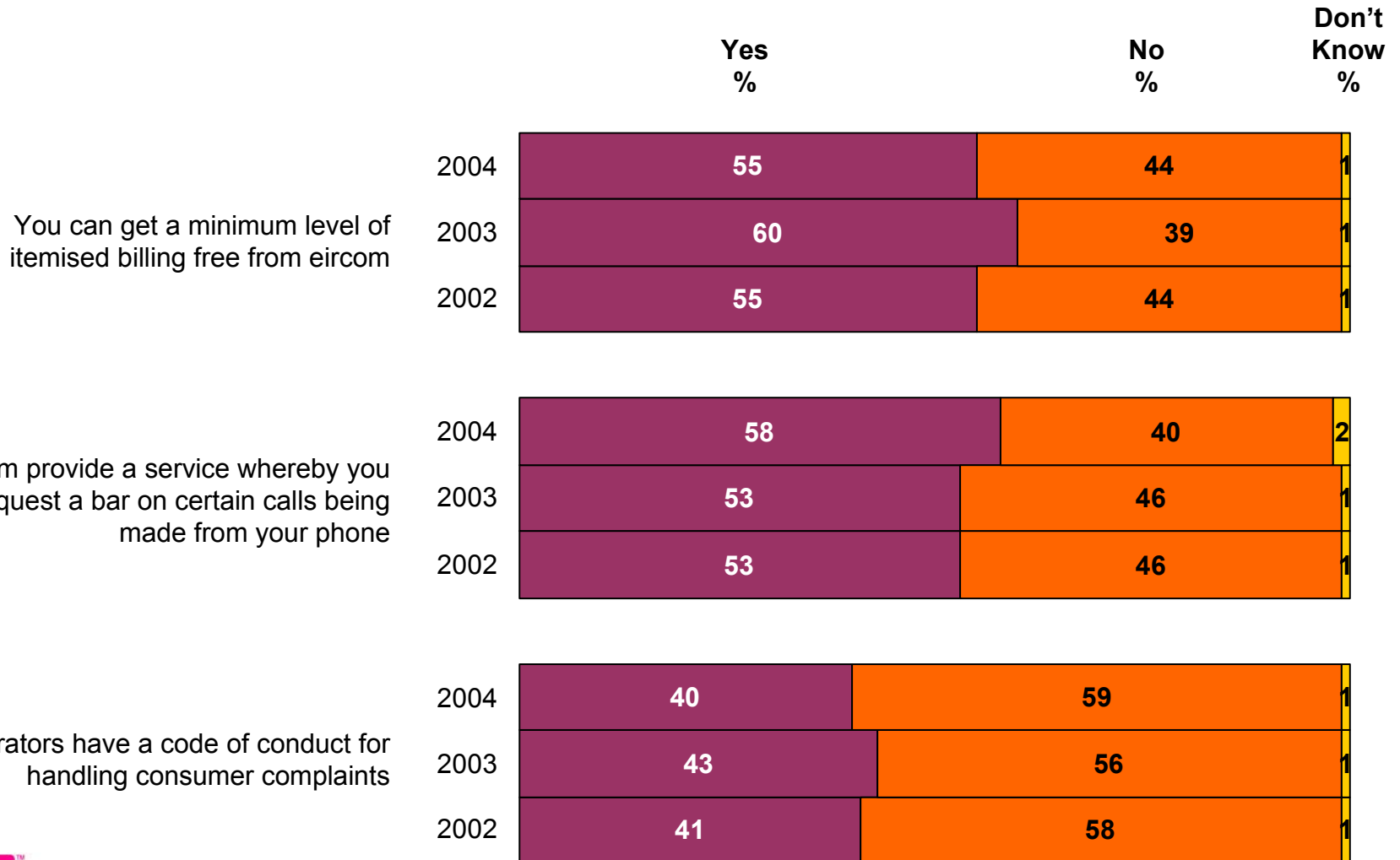
Factors Considered The Most Important When Choosing Home Telephone Supplier*

Base: All Respondents: 516



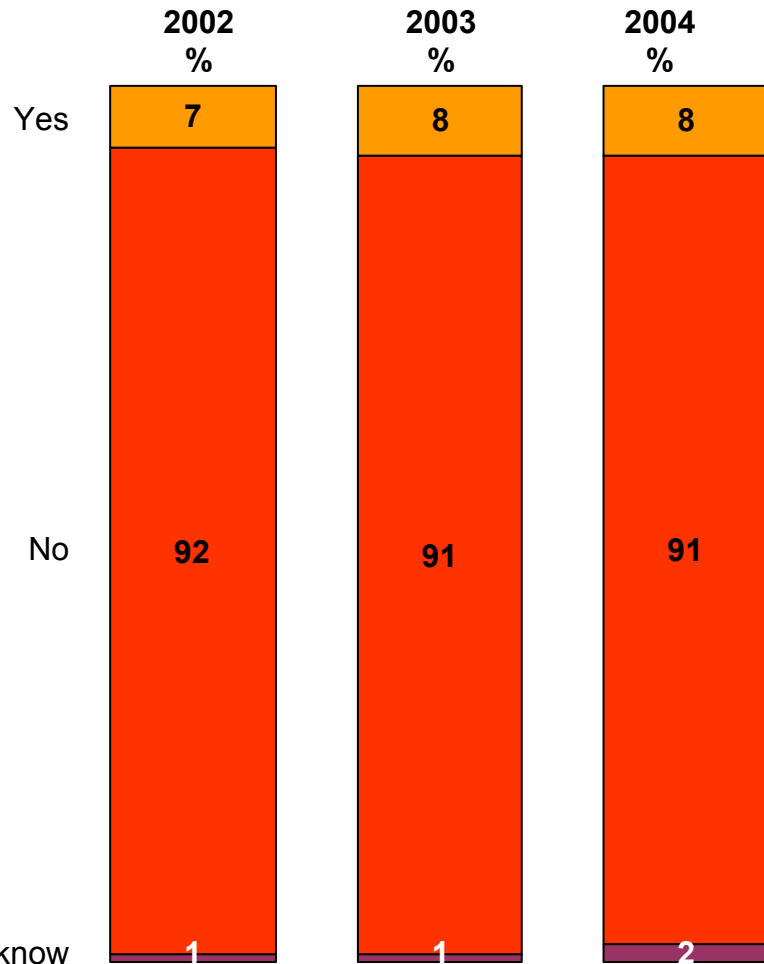
Awareness Of Different Operator Services

Base: All Respondents: 516



Whether Bar Certain Calls From Phone To Control Expenditure

Base: All Respondents: 516



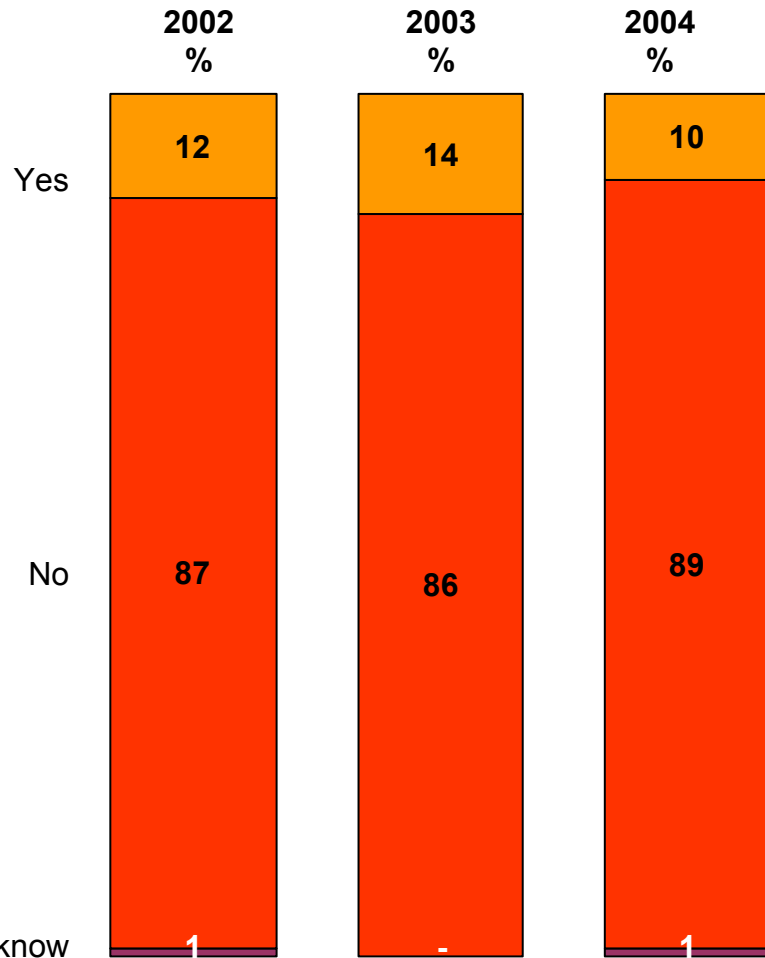
Calls Barred Base: 39		
	2004 %	2003 %
Mobile calls	58	(42)
International calls	17	(28)
Premium rate calls	21	(27)
National calls	7	(14)
Local calls	2	(9)
Other calls	5	(9)
Don't know	3	(7)

Don't know



Whether Ever Been Disconnected By Service Provider

Base: All Respondents: 516

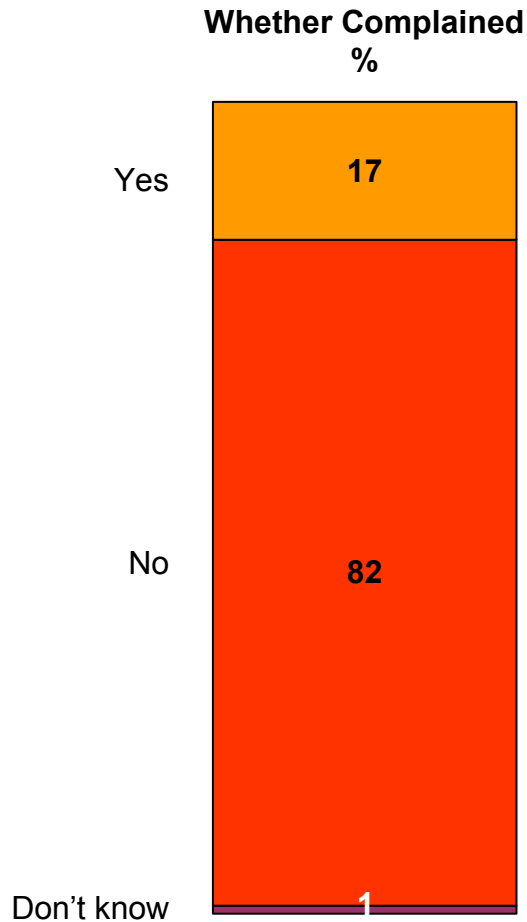


Adequate Notice Given		
Base: 51		
	2004 %	2003 %
Yes	28	(33)
No	69	(57)
Don't know	4	(9)

Don't know

Incidence Of Complaining To Telephone/Mobile/Internet Supplier

Base: All Respondents: 516



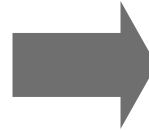
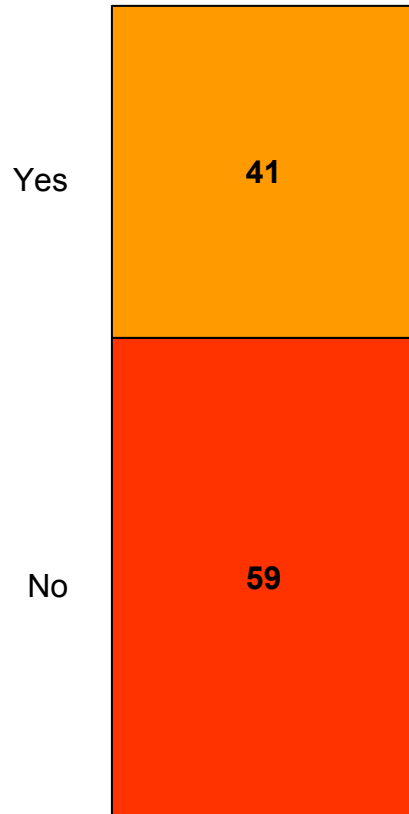
Nature of Complaint
Base: 86

	%
Poor service quality	60
Incorrect charges on bill	21
Cost of using the service	10
Incorrect advice from staff	7
They disconnected us	3
Other	10
Don't know	2

Difficulties Encountered When Making Complaints

Base: All those making a complaint: 86

Whether Any Difficulty Encountered
%

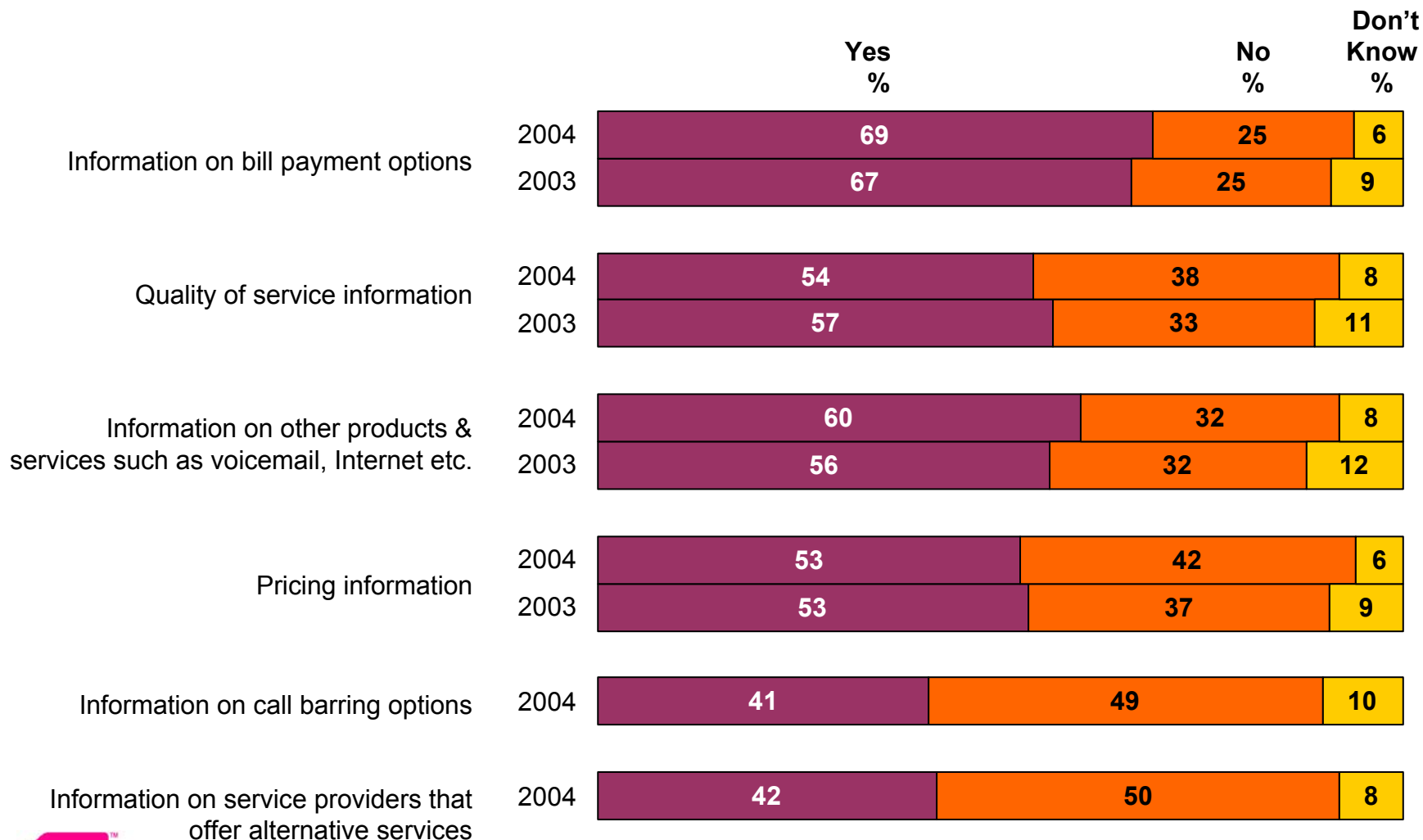


Difficulties Encountered
Base: 36

Difficulty	%
Not listened to/rude/unhelpful	27
Problem/issue never resolved	18
Complaint took a long time to resolve	15
Left holding for hours/ages	8
Billing errors	7
Constant re-routing	7
No response from operator	6
Unable to make contact with operator to complain	5
Slow Internet connection	2
Other	8
Don't know	7

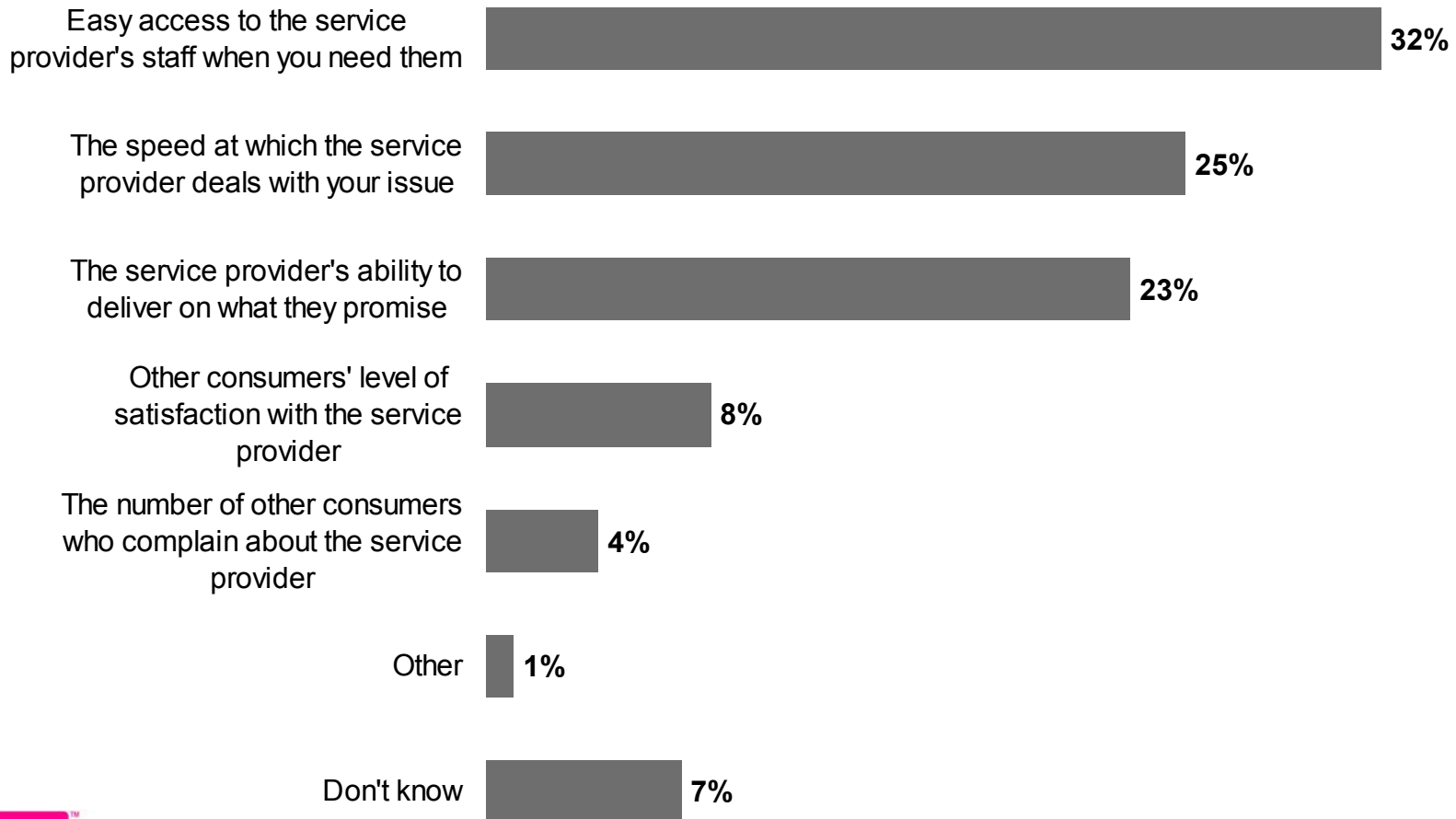
Whether There Is Sufficient Information Available To Help Choose A Home Telephone Supplier

Base: All Respondents: 516



The Most Useful Performance Indicator For Assessing the Quality Of Service Provided by A Telephone Operator

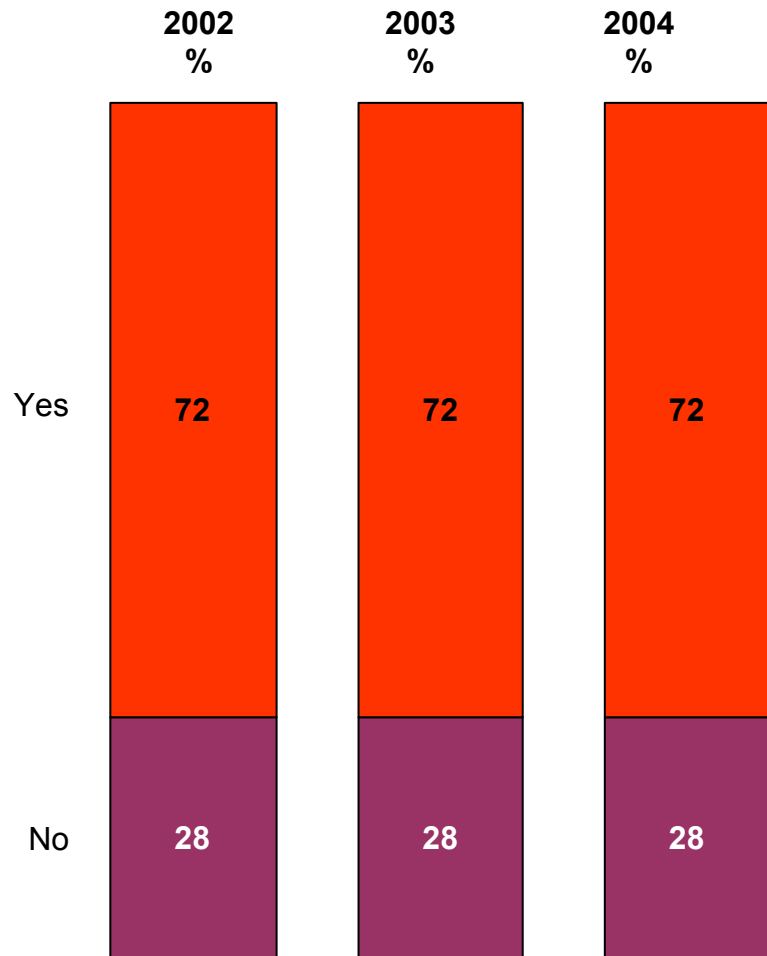
Base: All Respondents: 516



Mobile Sector

Regular Use Of A Mobile Phone

Base: All Respondents: 516



Mobile Phone Supplier
(Base: 370)

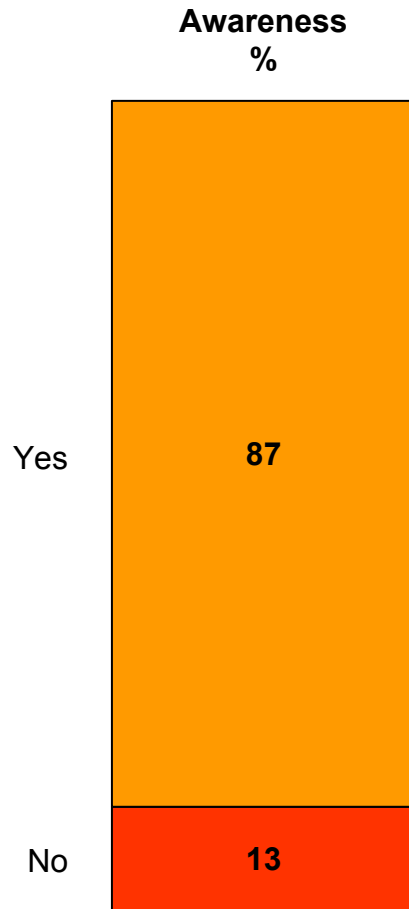
	2004 %	2003 %
Vodafone	55	(58)
O2	33	(36)
Meteor	6	(2)
Don't know	5	(3)

Payment Method
(Base: 370)

	2004 %	2003 %
Get bills	33	(32)
Buy cards & pay in advance	66	(67)

Interest In Mobile Number Portability (i.e. Keeping 085, 086, 087 Prefix When Changing Provider)

Base: All Mobile Phone Users: 370

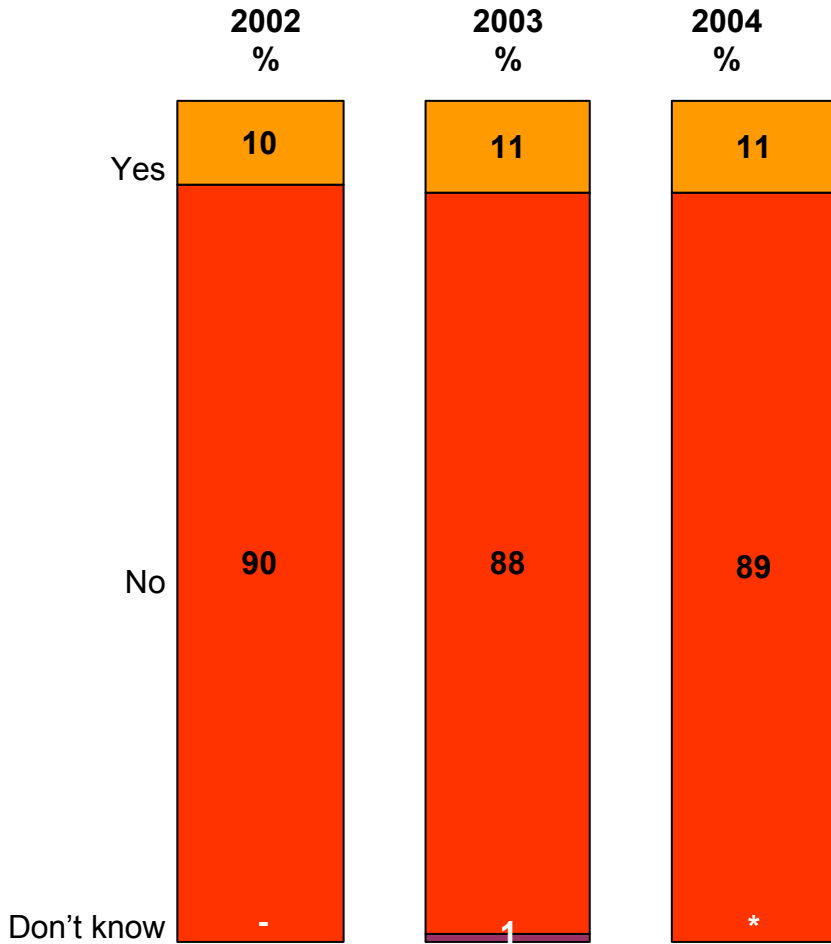


More likely to change operators in the future if able to keep their number
Base: 320

	%
Yes	57
No	40
Don't know	4

Whether Switched Mobile Supplier In The Past Twelve Months (I)

Base: All mobile phone users: 370



Main Reasons For Switching		
Base: 35		
	2004 %	2003 %
Changed phone	36	(39)
Good deals/special offer	19	(11)
Phone lost/broken	16	(-)
Better coverage/network	15	(11)
Cheaper calls overall	13	(23)
Customer service better	6	(10)
Other	15	(-)

Whether Switched Mobile Supplier In The Past Twelve Months (II)

Base: All mobile phone users: 370



Main Reasons For Not Considering Switching Base: 335

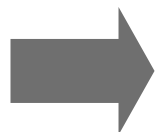
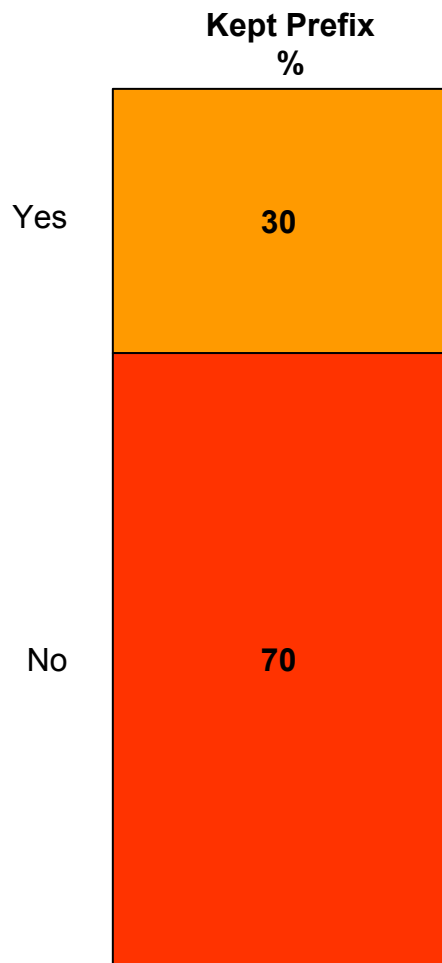
	2004 %	2003 %
Happy with current service levels	45	(43)
Believe getting best value for money	10	(5)
Not a heavy mobile user/no need to	10	(4)
Never thought about it/not bothered	9	(5)
Coverage issues	8	(7)
Don't see any advantages/all the same	8	(-)
Haven't had the phone very long	3	(-)
Have always used/loyalty	3	(-)
Company decision/phone	2	(5)
Have a contract	2	(-)
Not aware of other packages/suppliers	2	(2)
Too difficult/too much hassle	1	(3)
Got phone as a gift	1	(2)
Other	4	(13)
No reason	2	(5)
Don't know	7	(11)

Whether Intend To Switch In Next 12 Months

	2004 %	2003 %
Yes	14	(9)
No	78	(86)
Don't know	7	(6)

Usage Of Mobile Number Portability

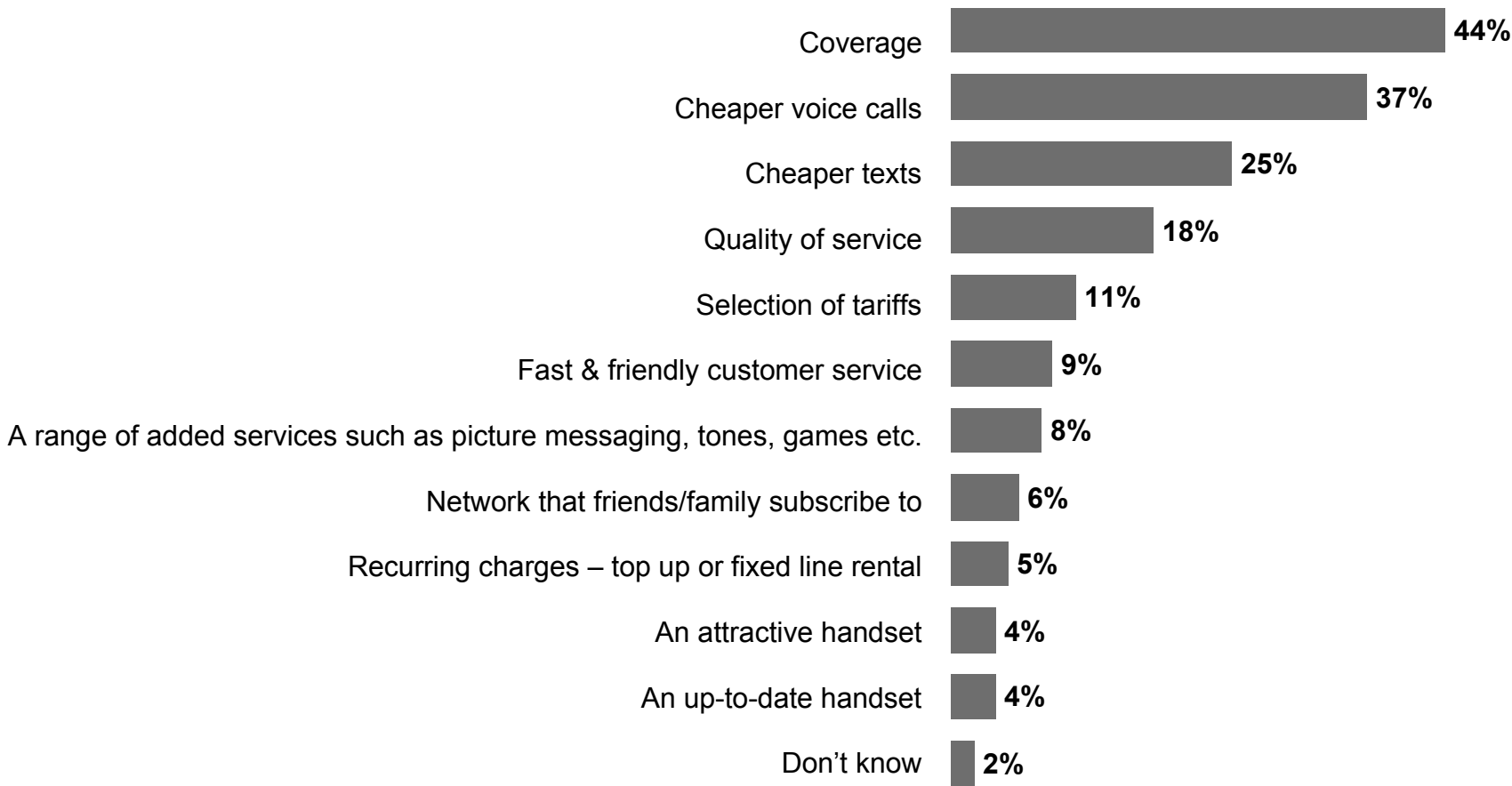
Base: Those who have switched mobile suppliers in the past 12 months: 35



100% were happy that the process was completed in a timely & efficient manner (Note: base of 10 people)

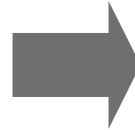
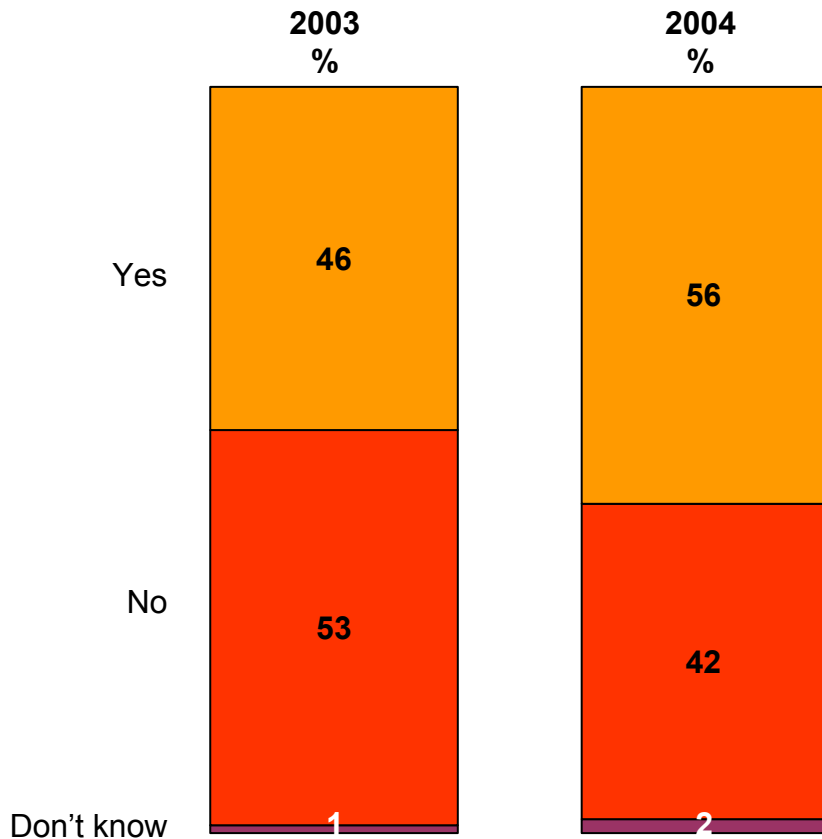
Factors Considered The Most Important When Choosing A Mobile Phone Supplier*

Base: All mobile phone users: 370



Awareness Of Any Cost Difference In Calling Another Mobile Network Compared To Calling Somebody On The Same Mobile Network

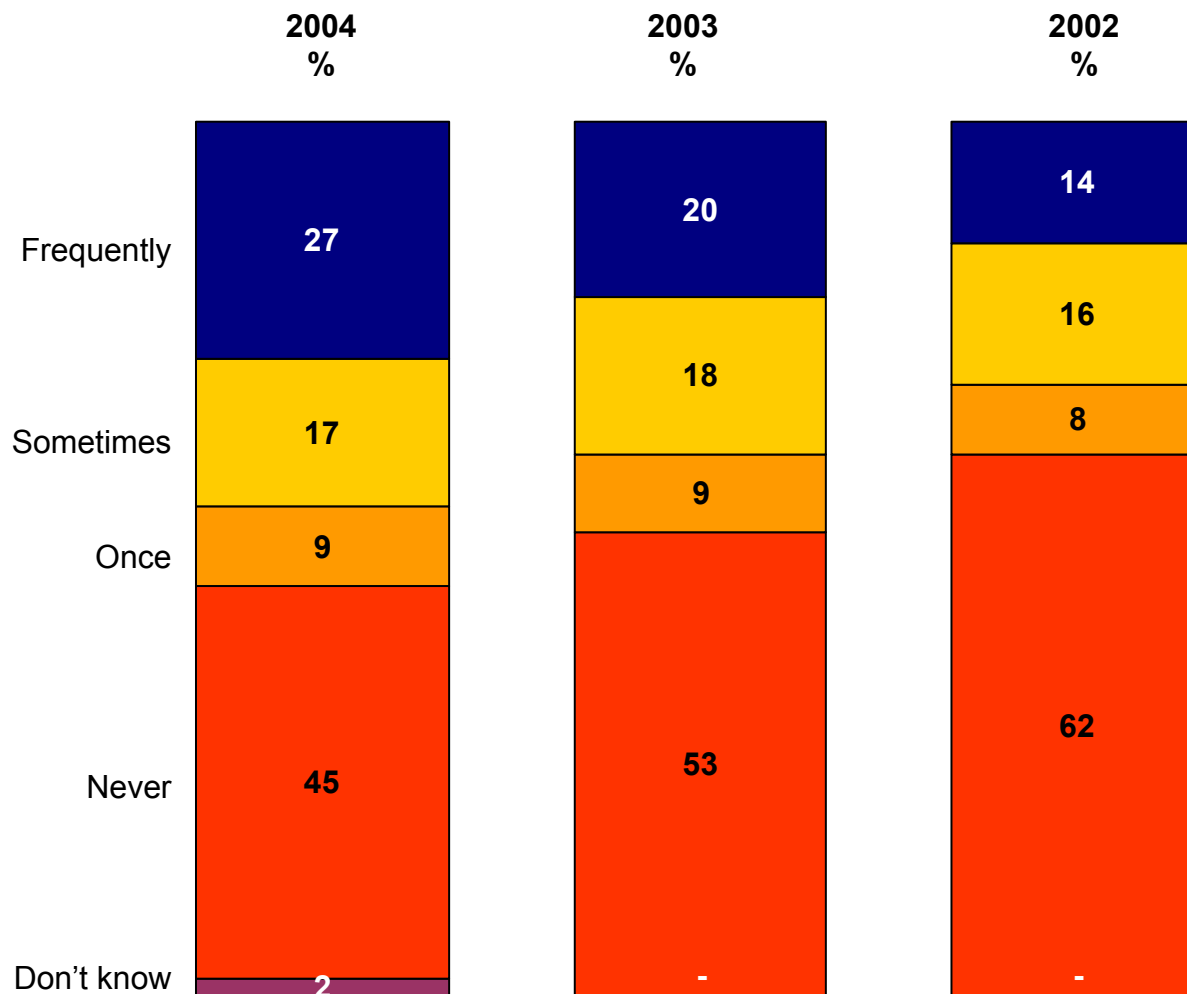
Base: All mobile phone users: 370



Perceived Cost Difference Per Minute During Peak Time Base: 204		
	2004 %	2003 %
Up to 5 cent	22	(22)
6 – 10 cent	8	(17)
11 – 20 cent	16	(11)
21 – 30 cent	8	(5)
31 – 40 cent	2	(3)
41 – 50 cent	4	(4)
51 – 100 cent	4	(5)
Over €1	1	(1)
Don't know	35	(31)

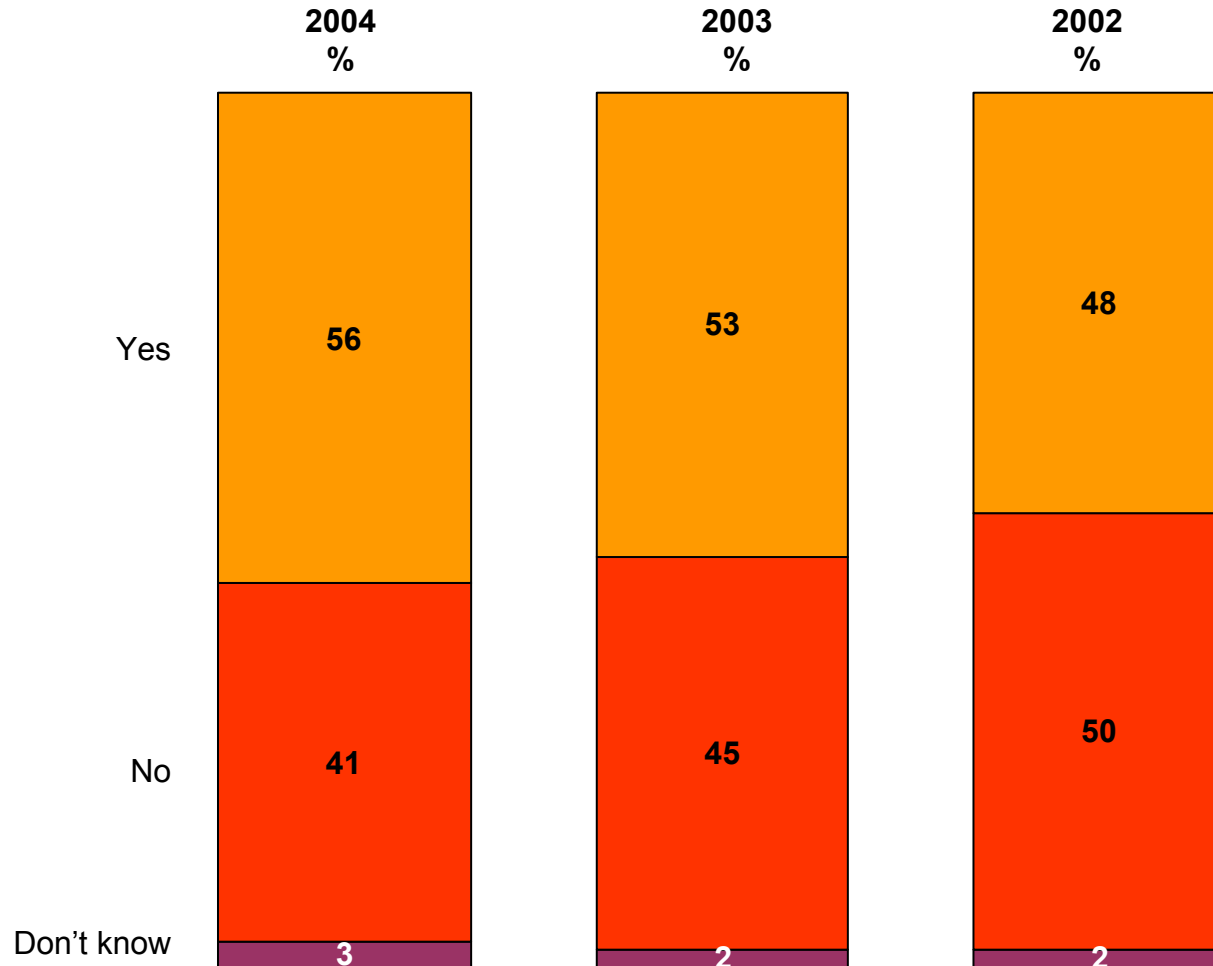
Frequency Of Using Mobile Abroad

Base: All Mobile Phone Users: 370



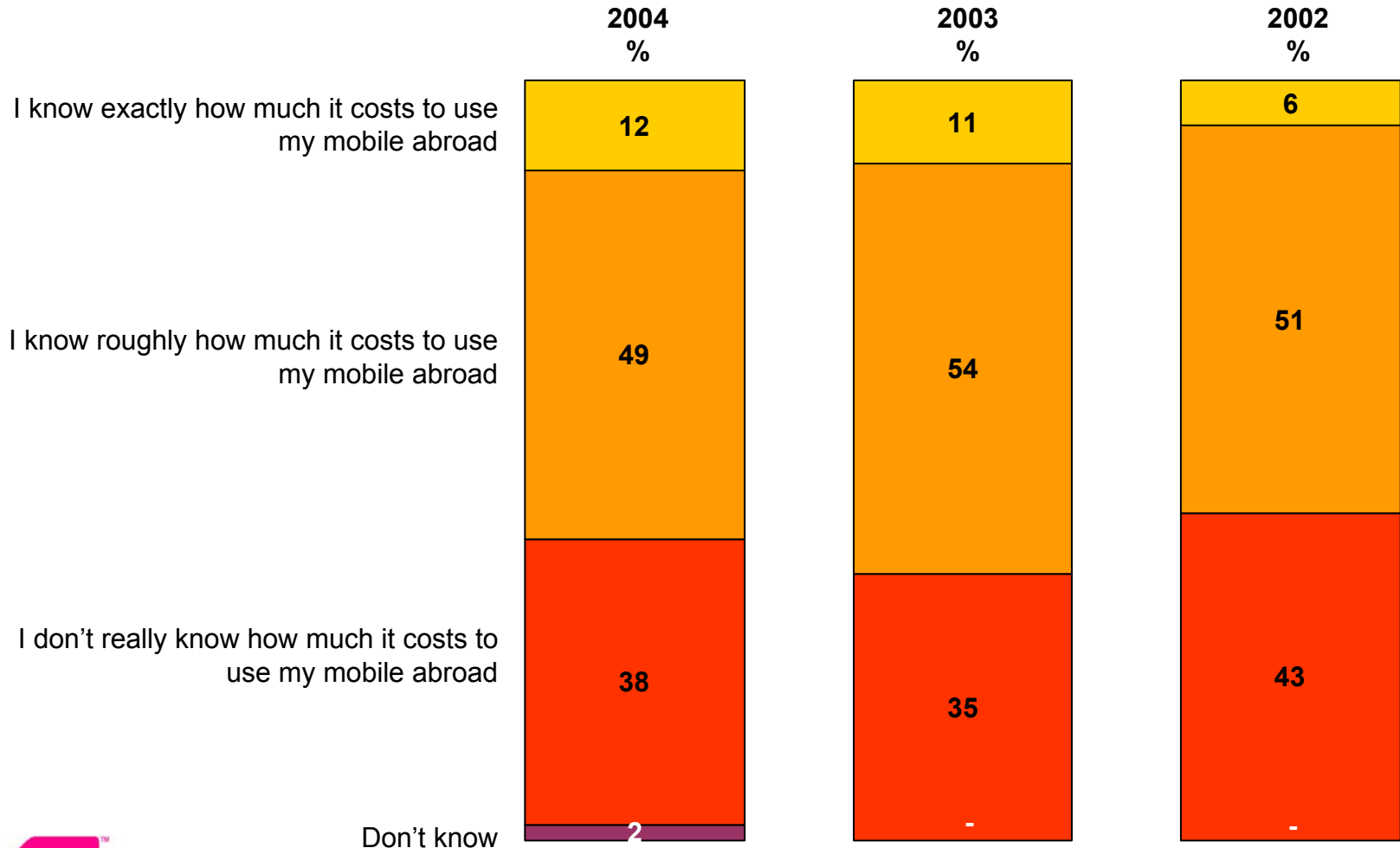
Awareness Of Cost Of Using Mobile Phone Abroad When Acquired Mobile Phone

Base: All Mobile Phone Users: 370



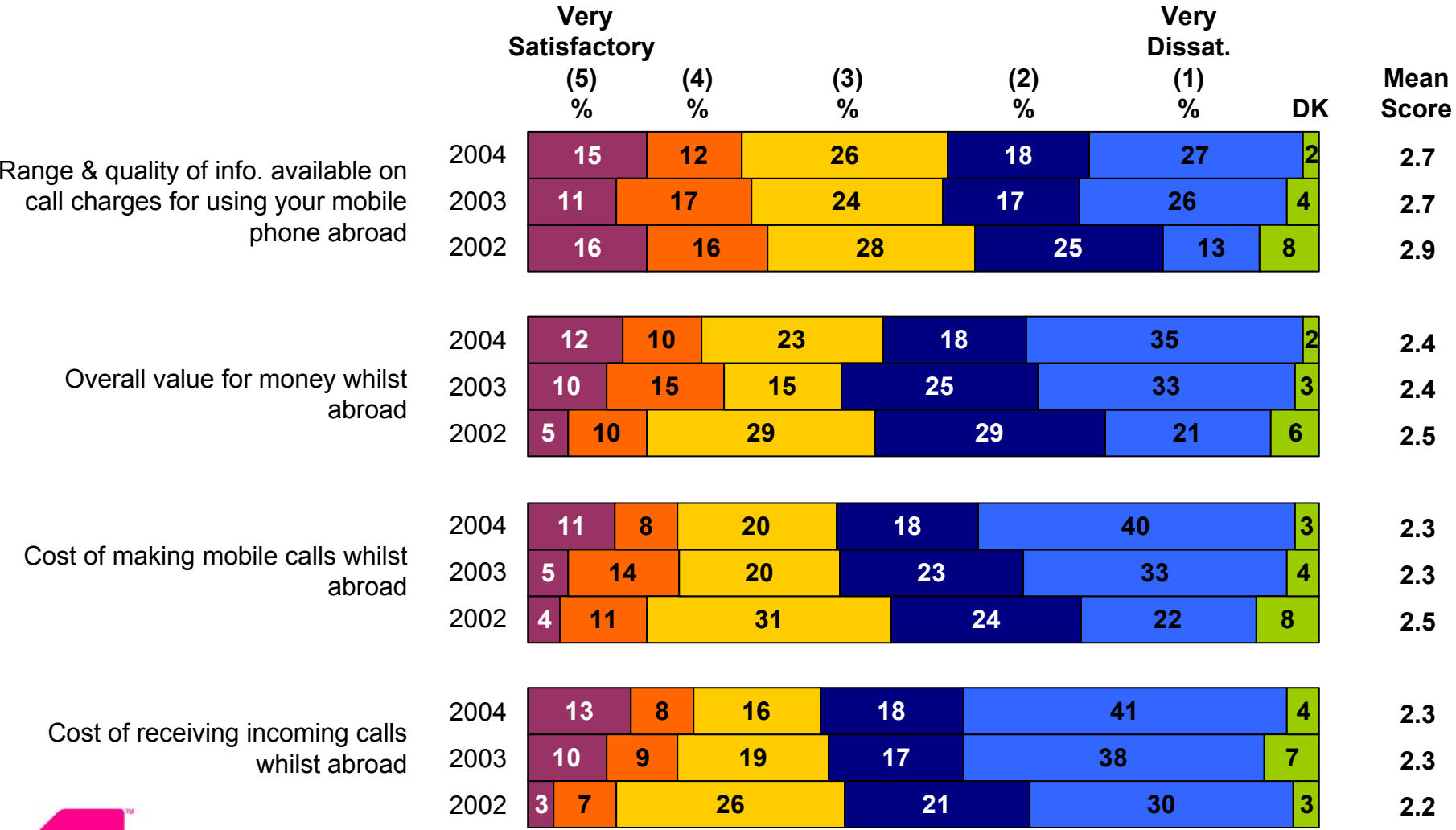
Awareness Of The Cost Of Using Mobile Phone Abroad

Base: All who have used mobile phone when abroad: 195



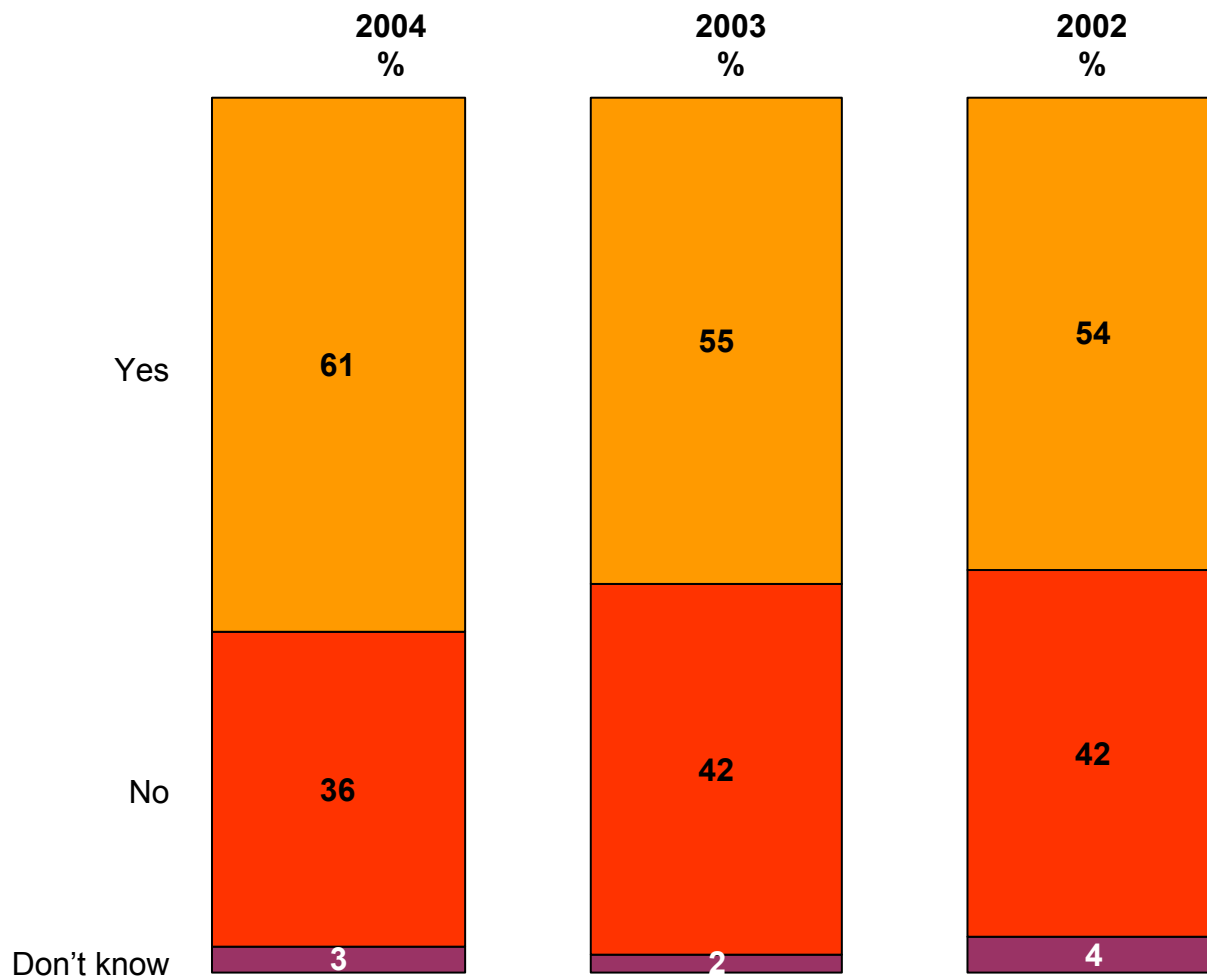
Satisfaction With Mobile Service When Using Abroad

Base: All who have used mobile phone when abroad: 195



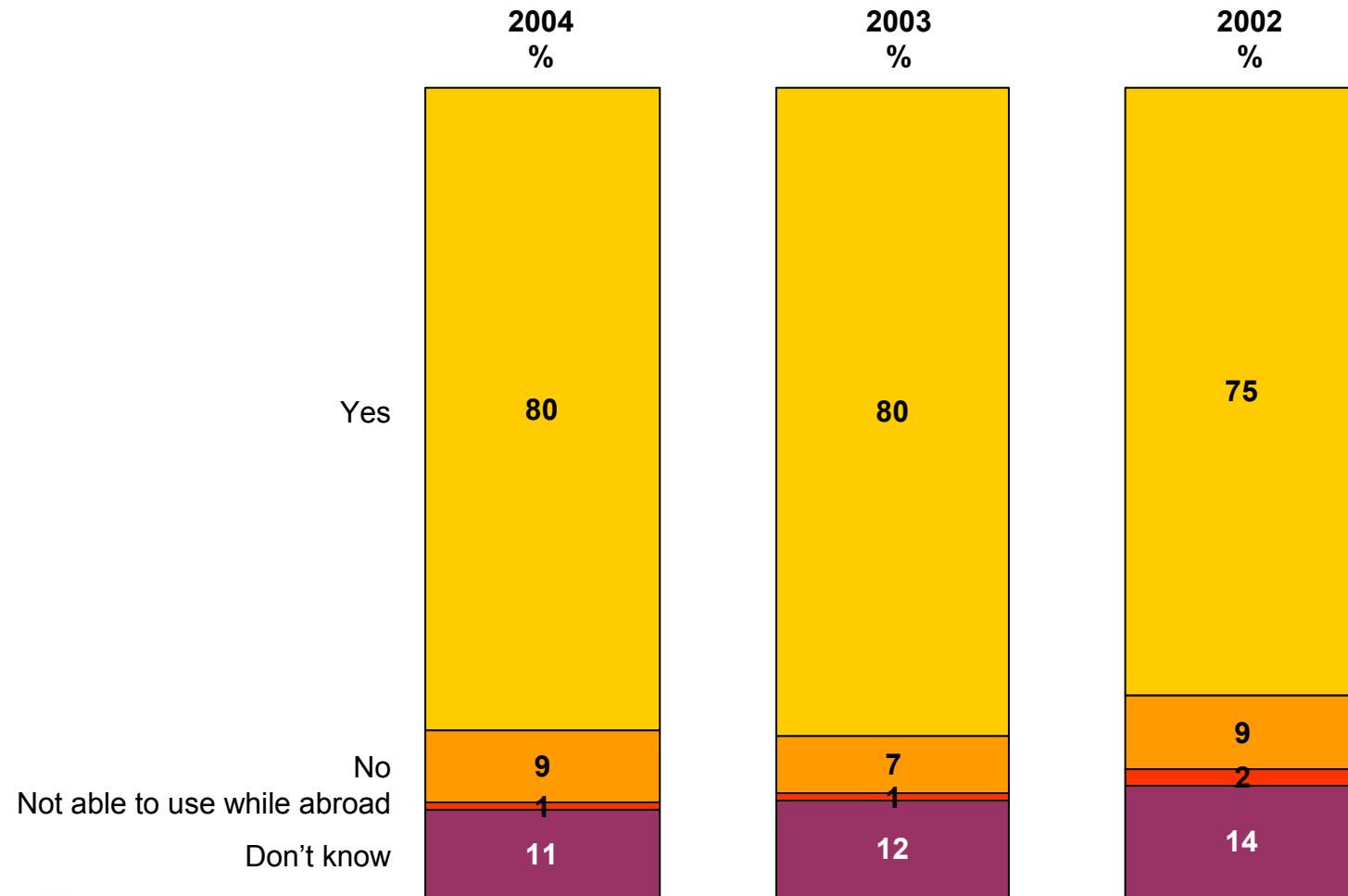
Whether Aware That Costs Abroad Depend On Network Used

Base: All who have used mobile phone when abroad: 195



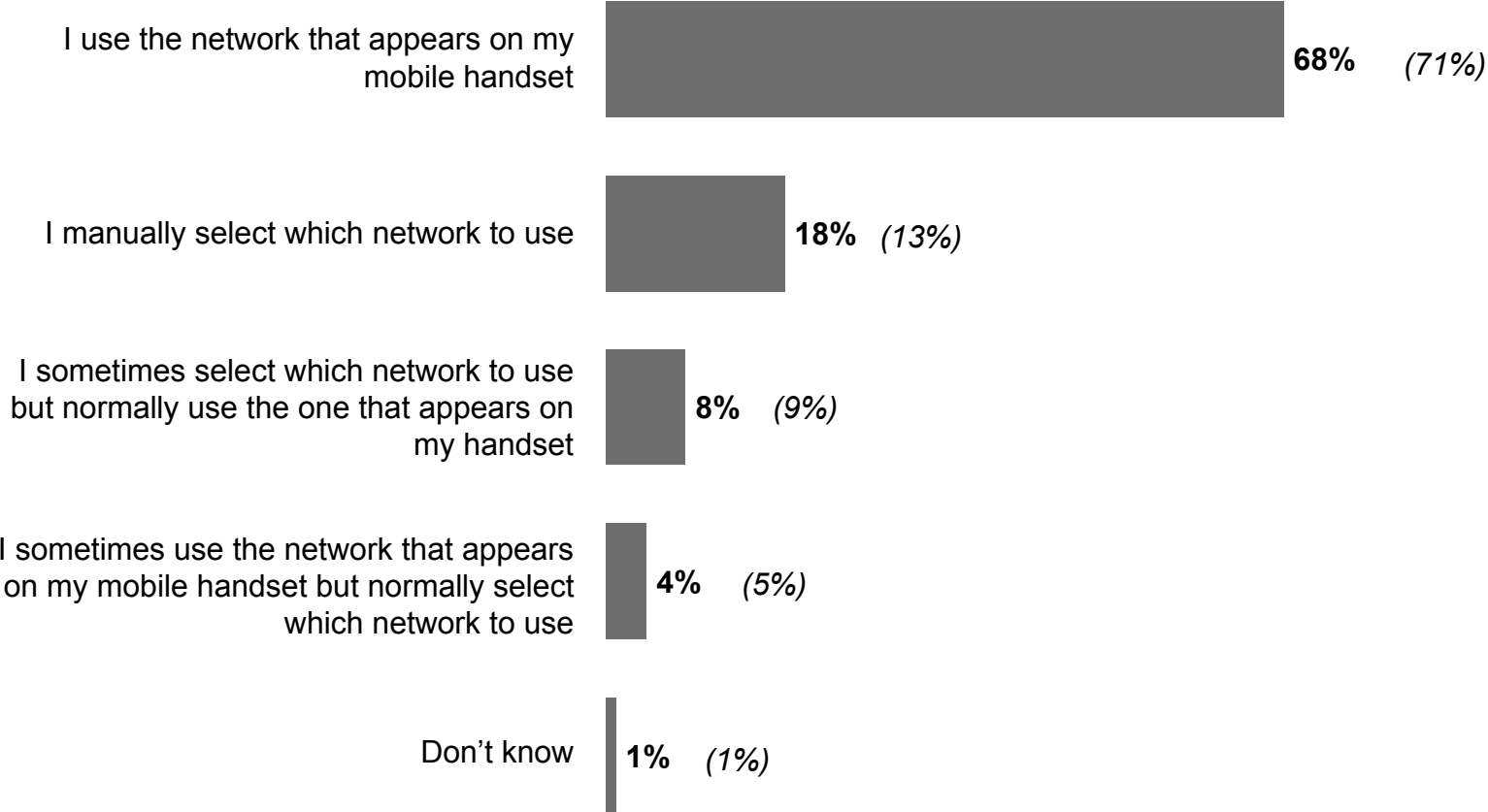
Whether Charged For Receiving Incoming Calls To Mobile When Used Abroad

Base: All who have used mobile phone when abroad: 195



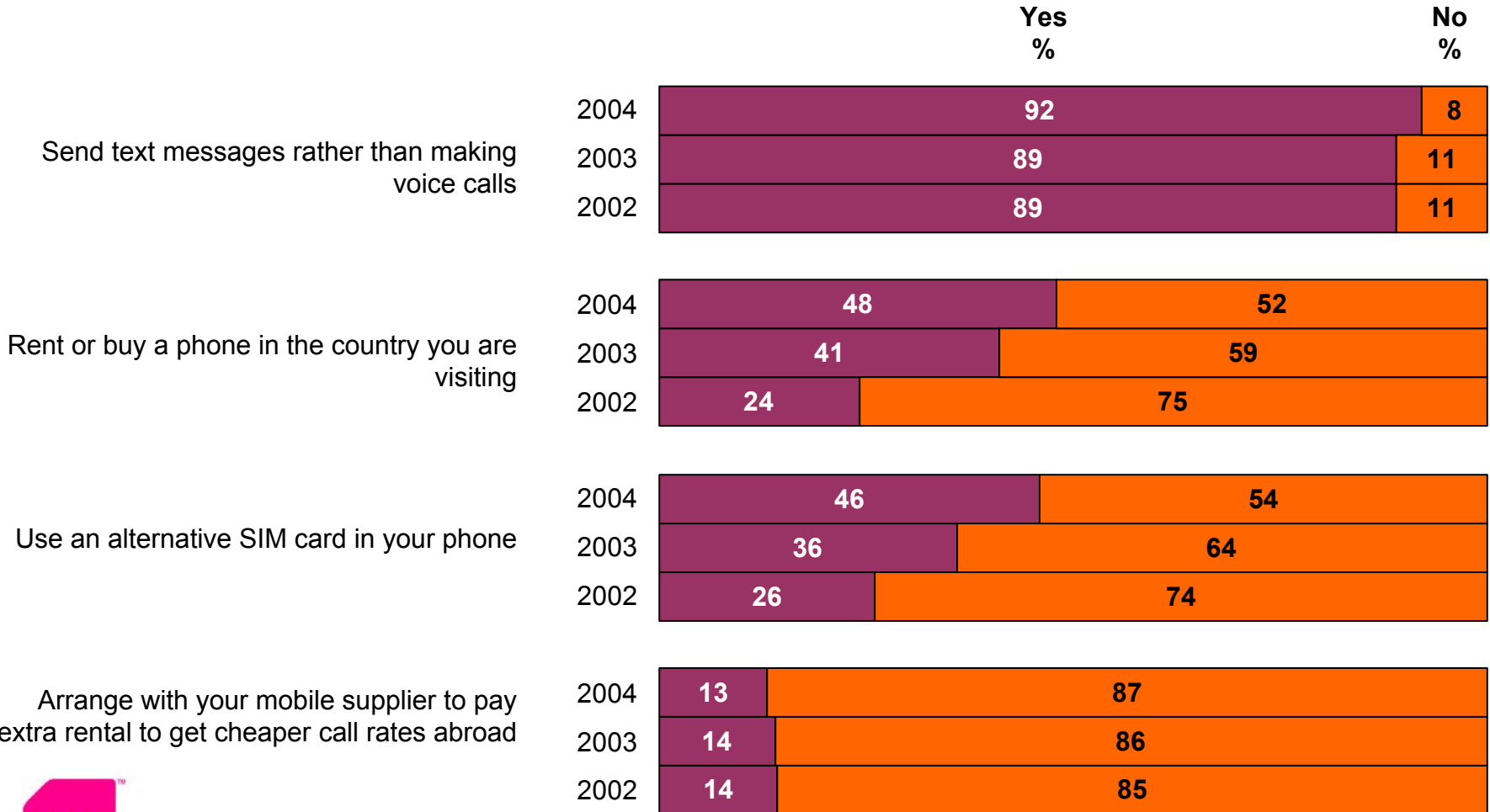
How Network Is Selected When Used Abroad

Base: All who have used mobile phone when abroad: 195



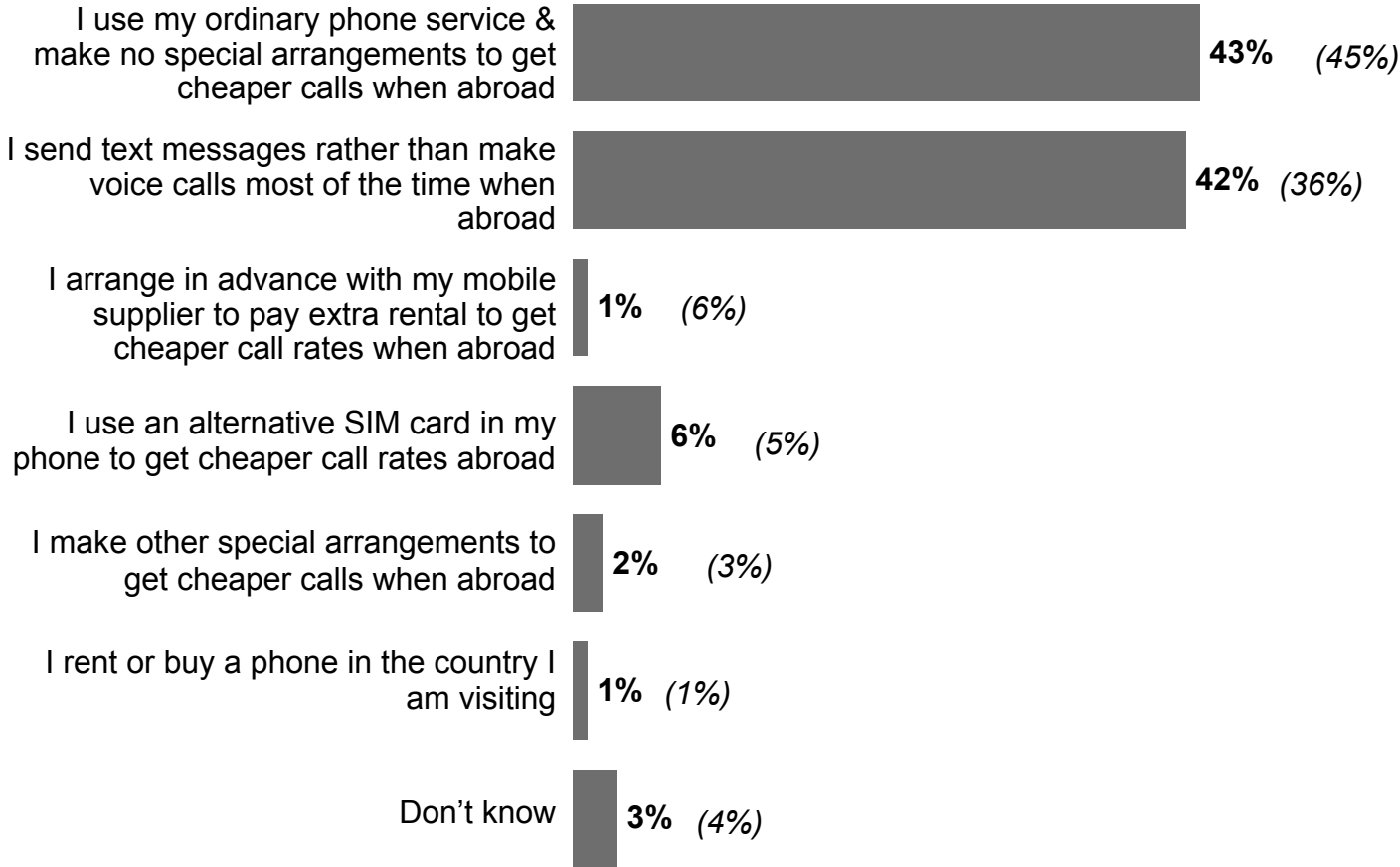
Whether Aware Of Ways To Get Cheaper Mobile Rates Abroad

Base: All who have used mobile phone when abroad: 195



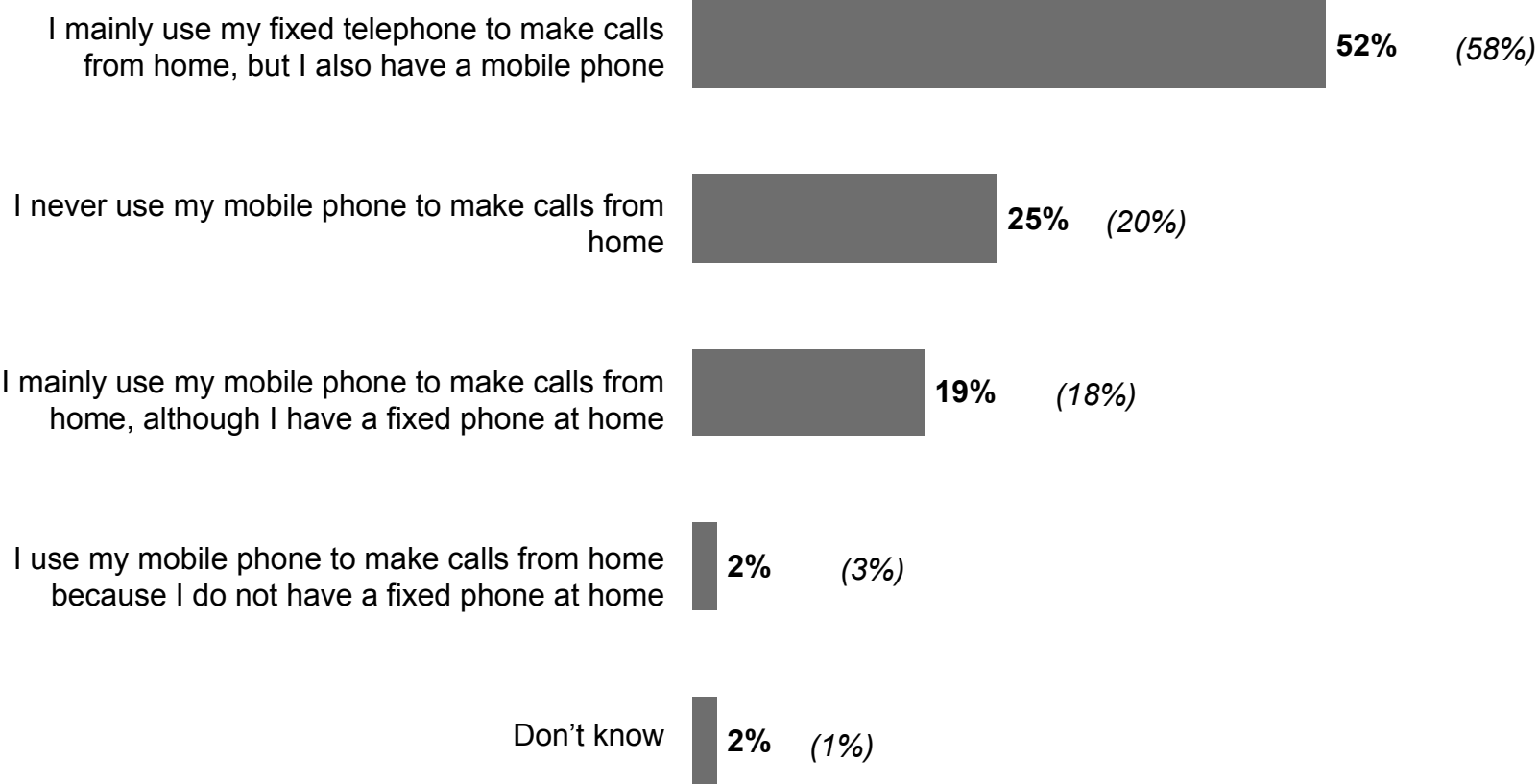
How Mobile Phone Is Used Abroad

Base: All who have used mobile phone when abroad: 195



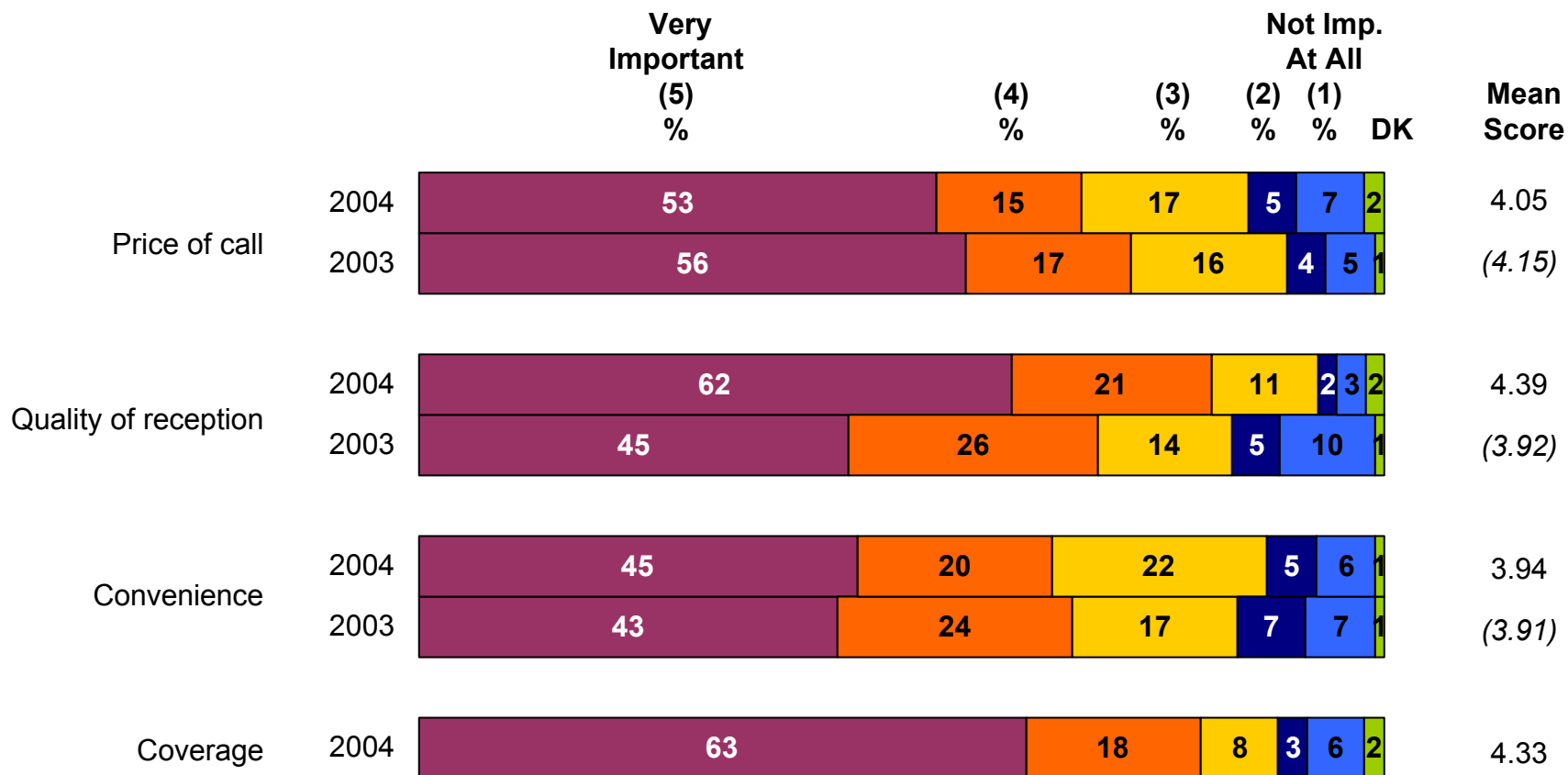
Statements Which Best Describe Usage Of Mobile Phone At Home

Base: All Mobile Phone Users: 370



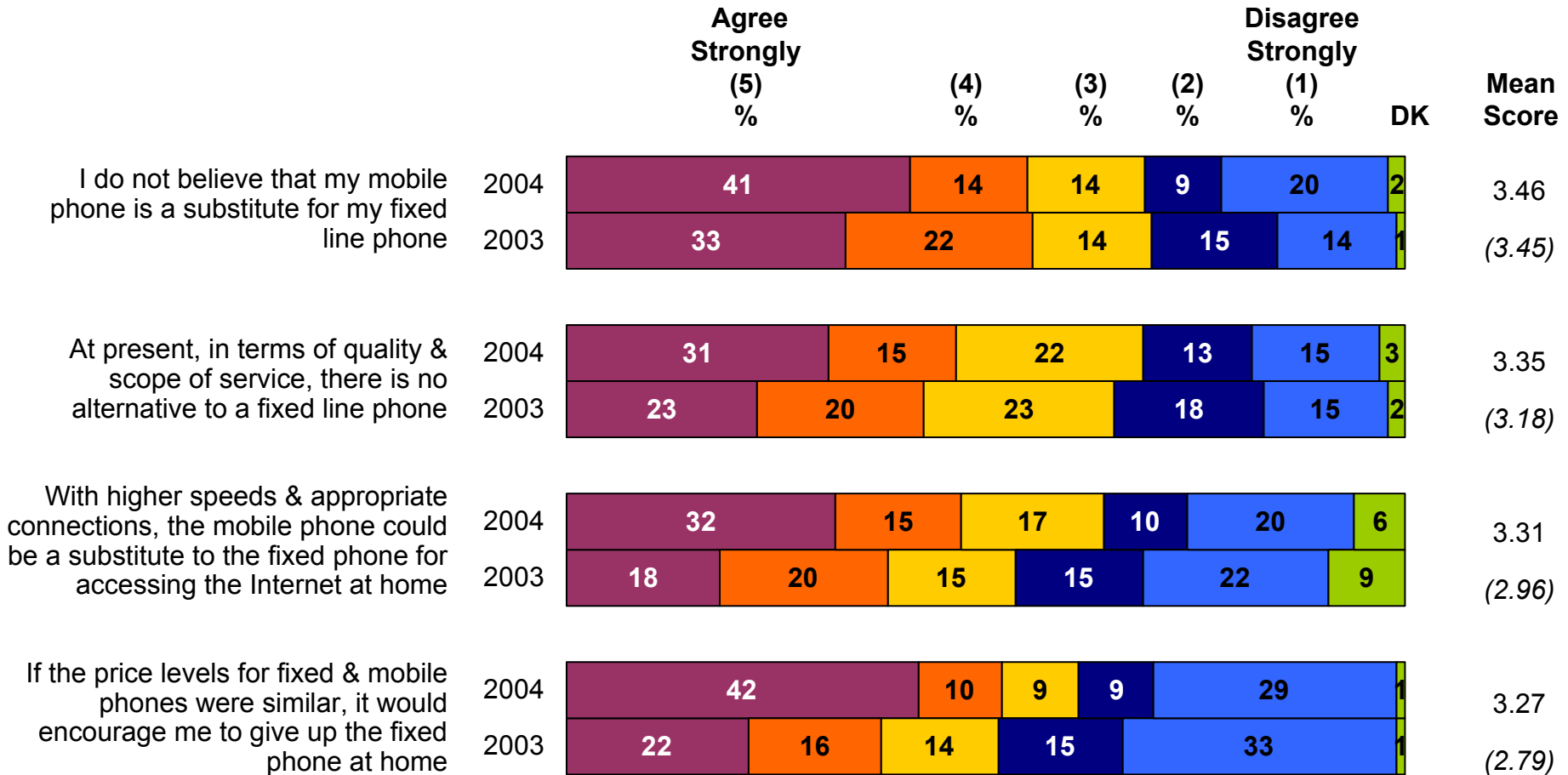
Importance Of Factors When Deciding Whether To Use A Fixed Or Mobile Phone To Make A Call

Base: All Mobile Phone Users: 370



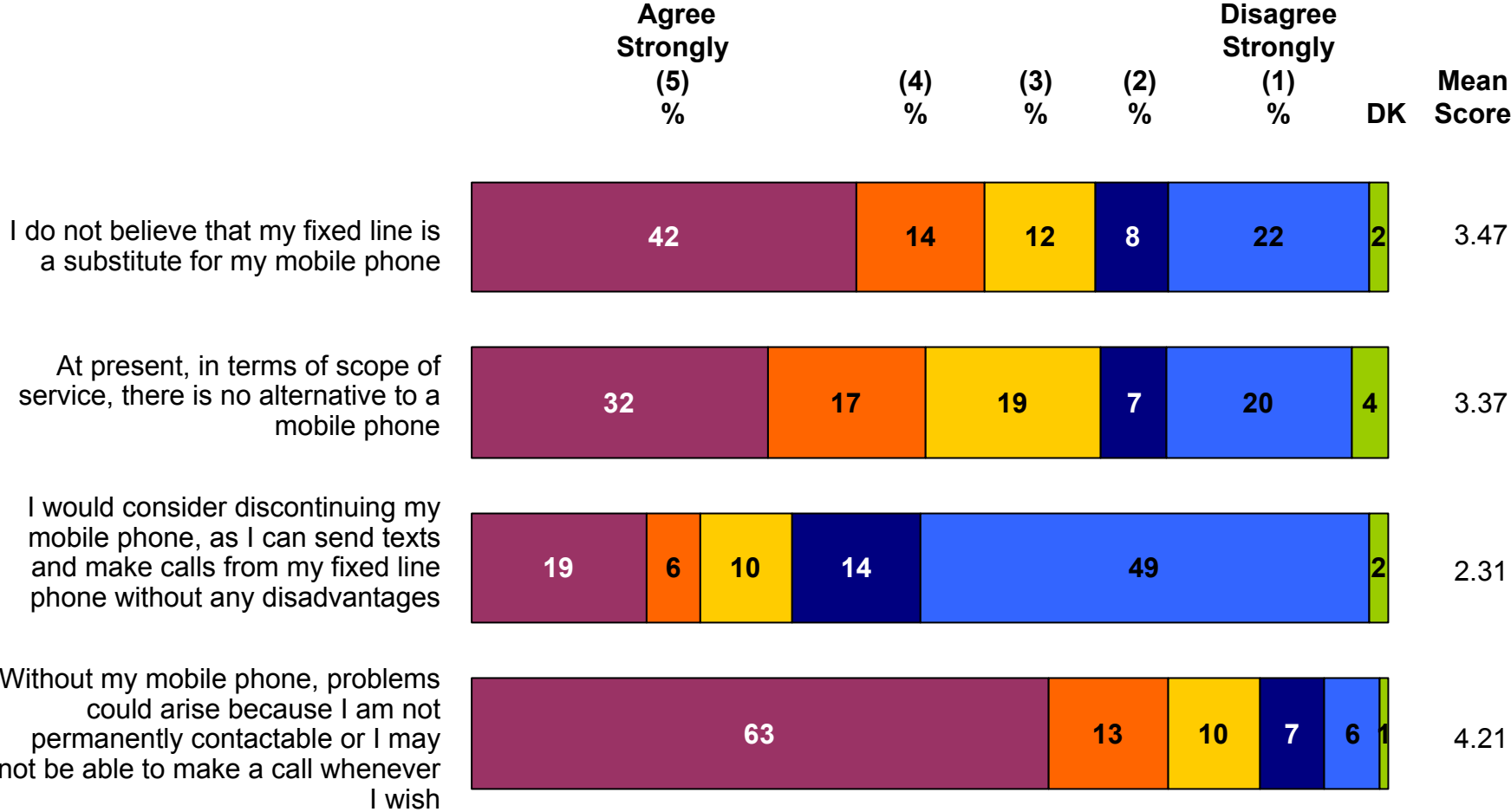
Agreement With Statements Concerning Fixed & Mobile Communication Services

Base: All Mobile Phone Users: 370



Agreement With Statements Concerning Mobile Communication Services

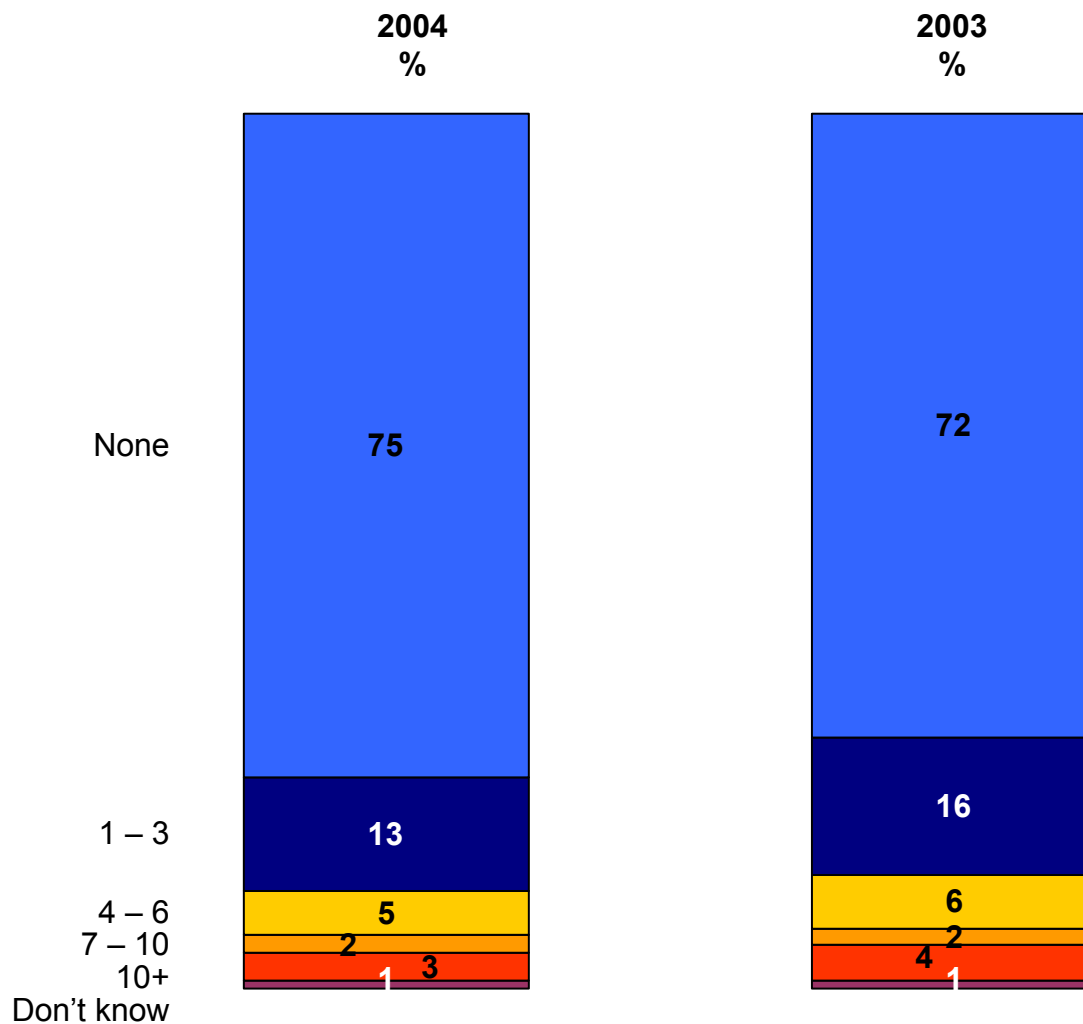
Base: All Mobile Phone Users: 370



Payphone Services

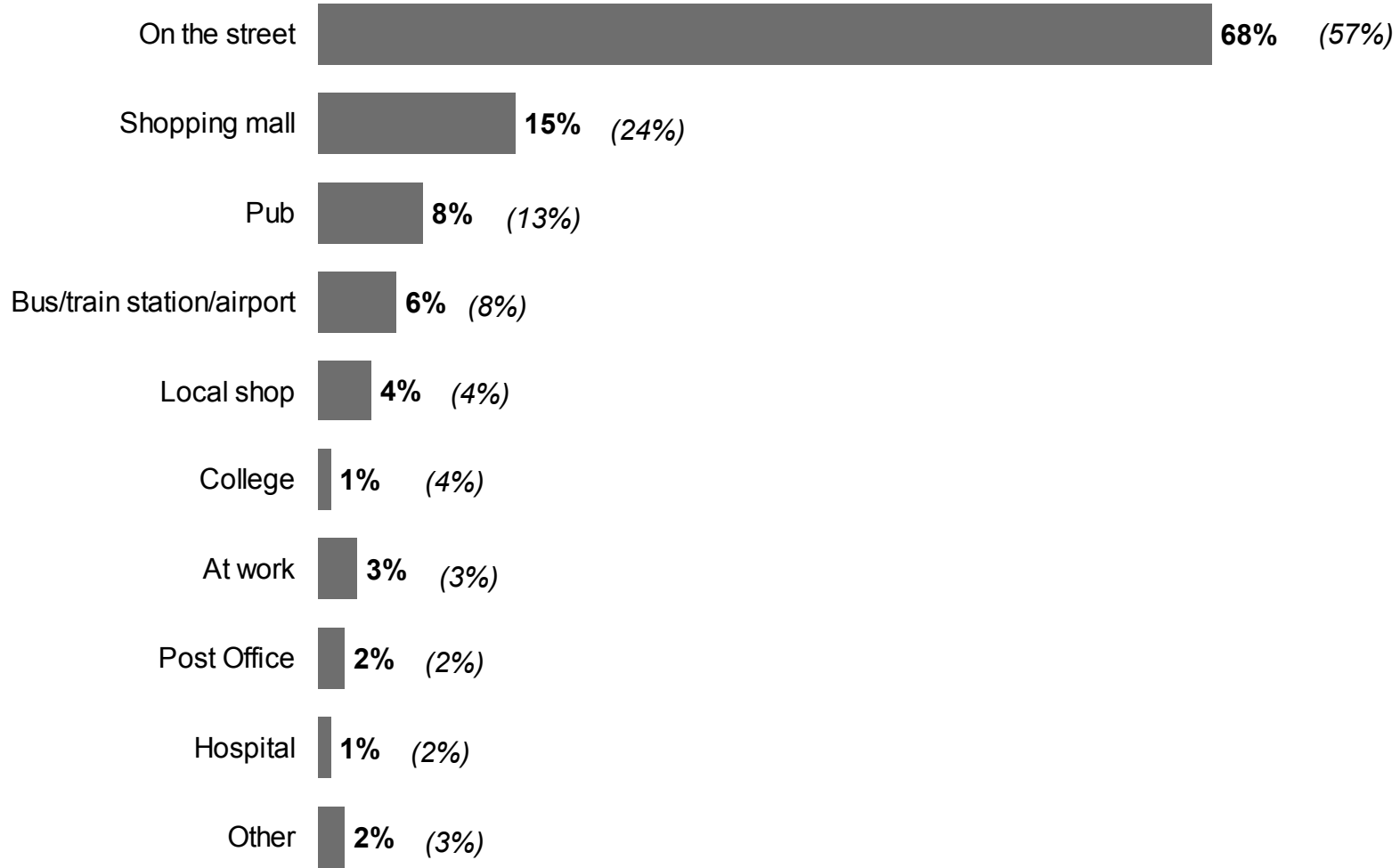
Calls Made From A Payphone In The Last Three Months

Base: All Respondents: 516



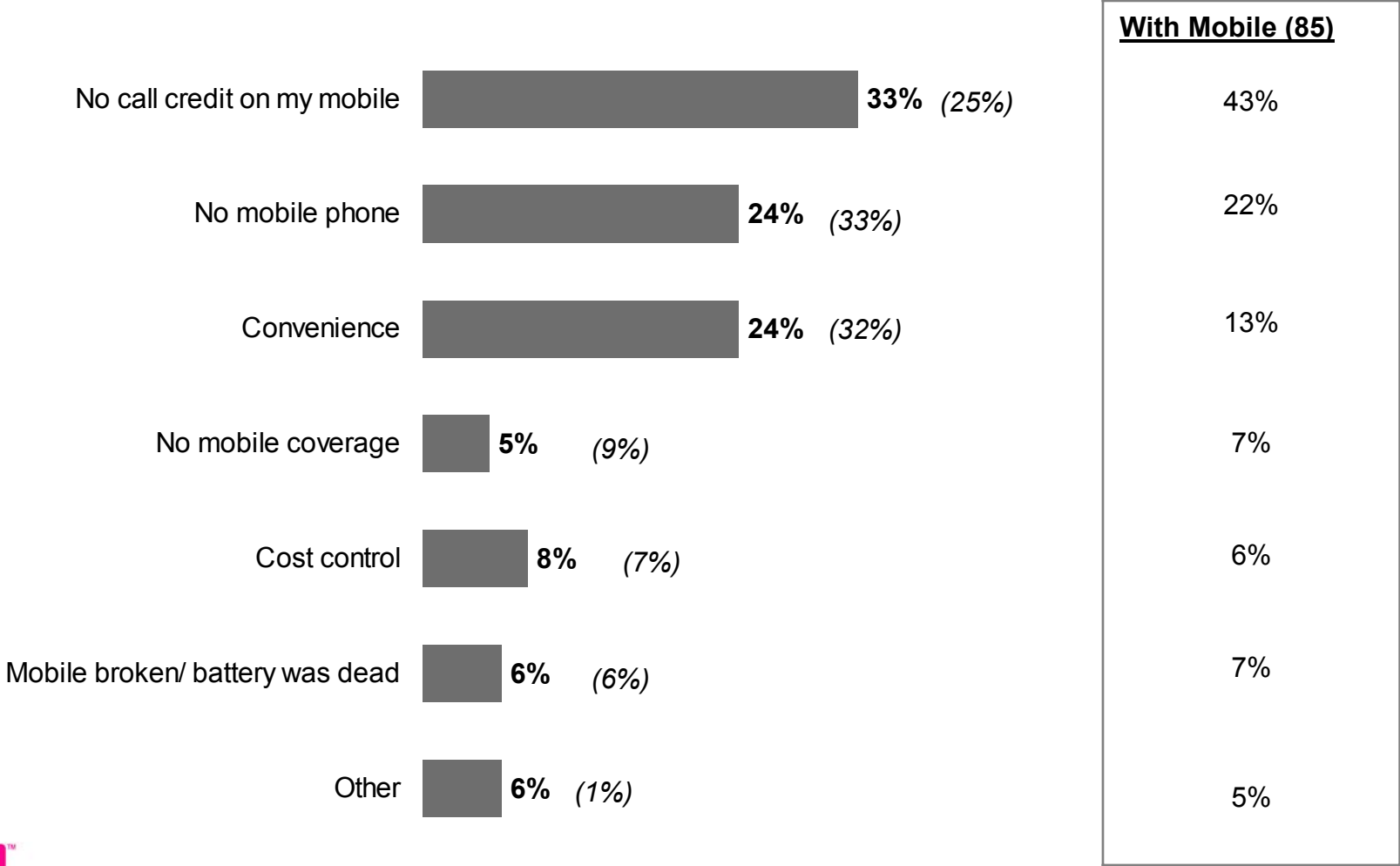
Location Of Payphones Used

Base: All using a payphone in the past 3 months: 118



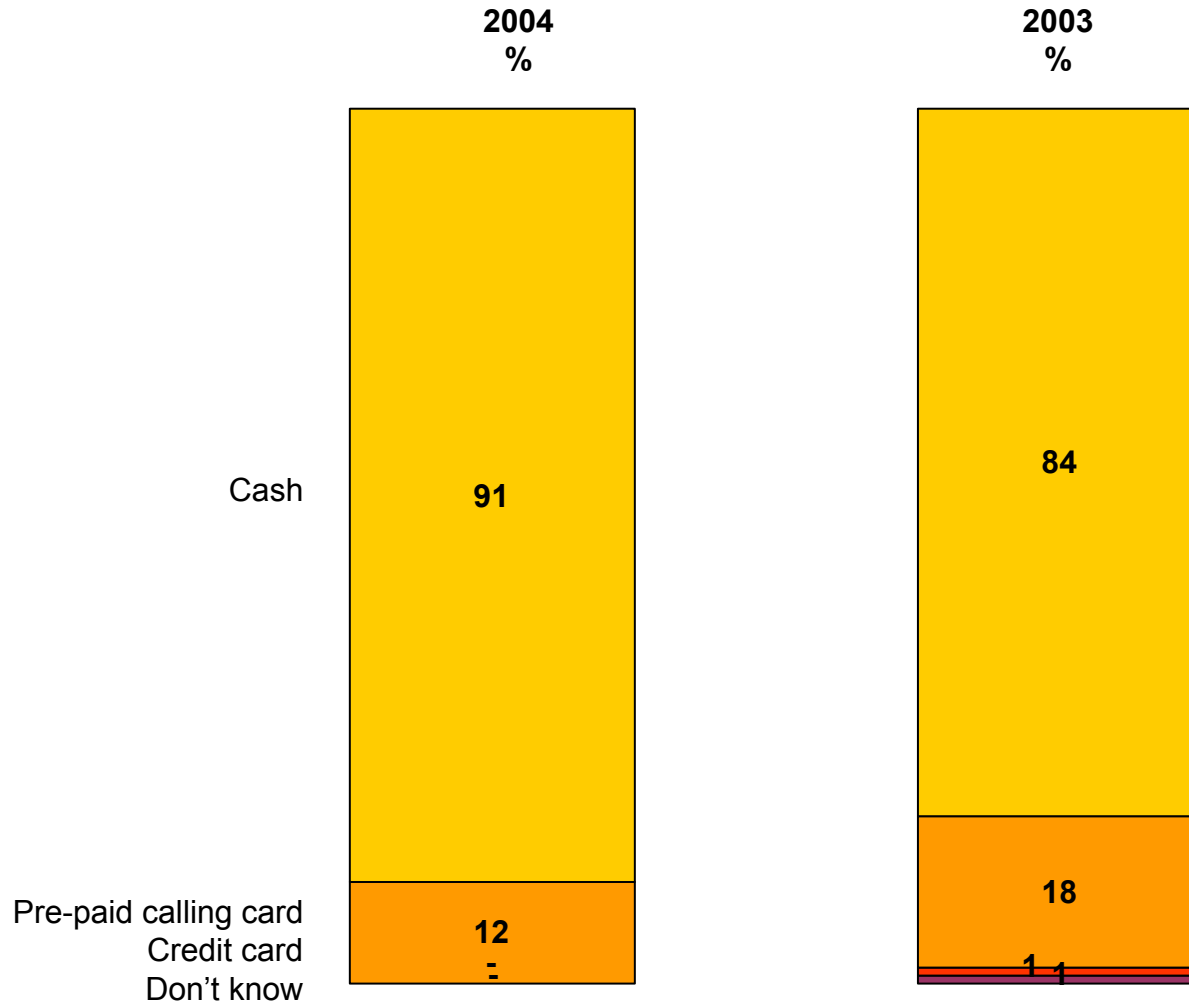
Reasons For Choosing To Use A Payphone Instead Of A Home Or Mobile Phone On These Occasions

Base: All using a payphone in the past 3 months: 118

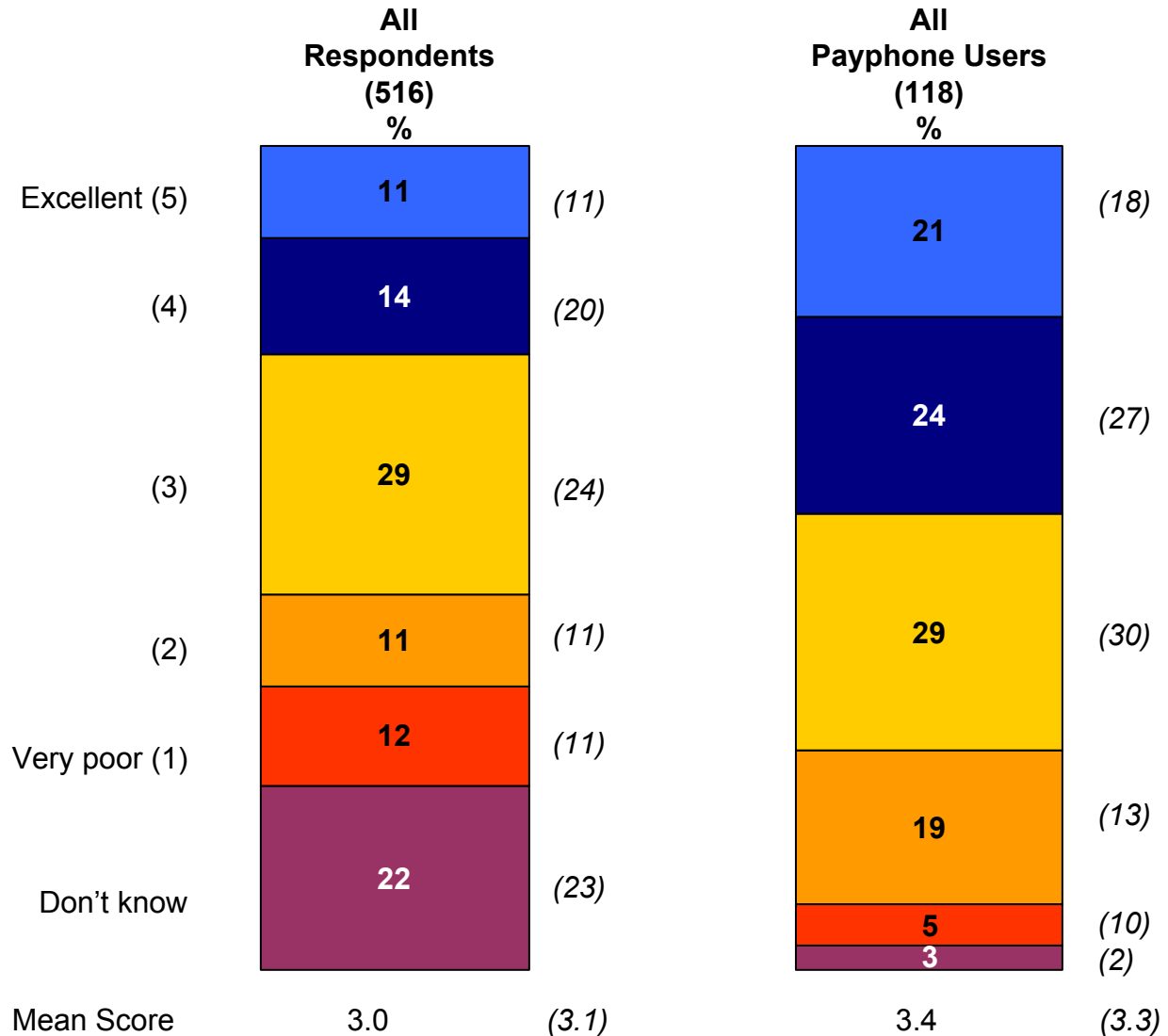


Method Of Payment Used For Payphones

Base: All using a payphone in the past 3 months: 118



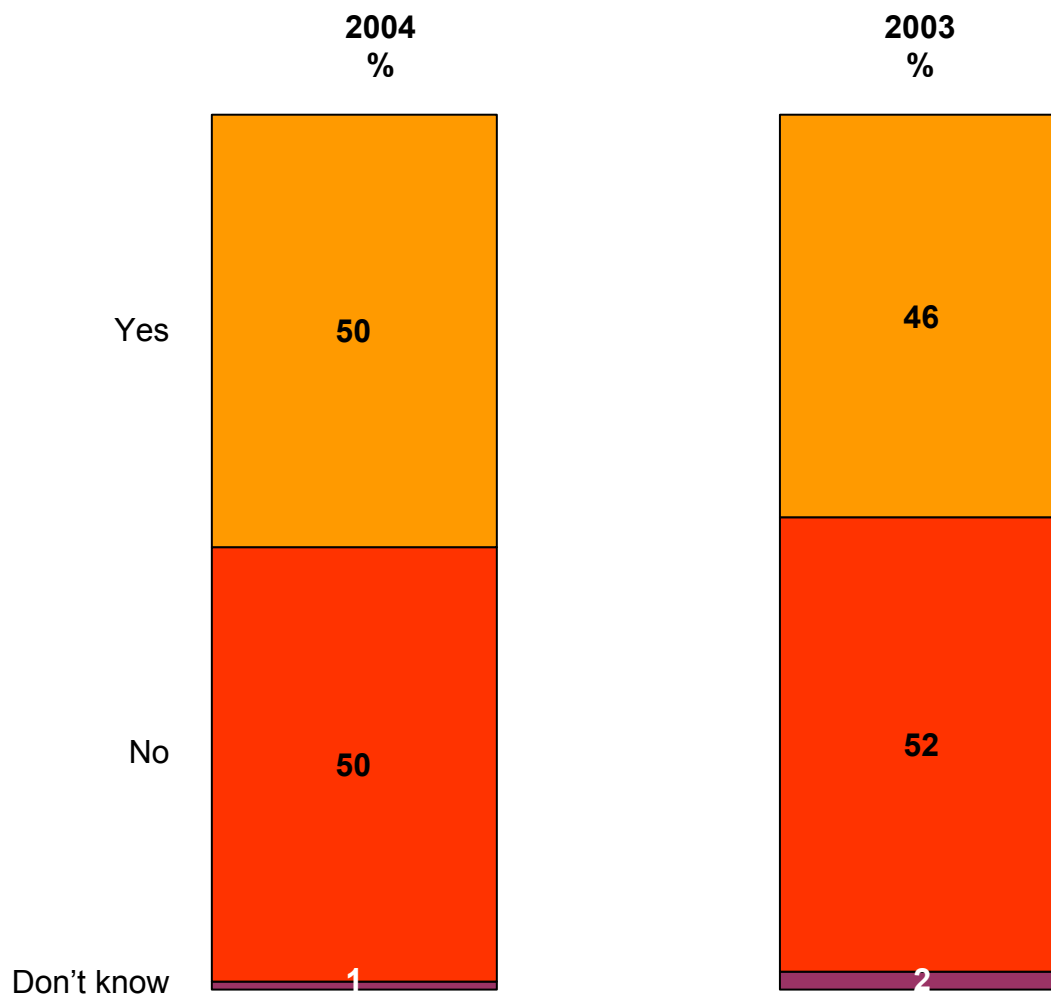
Rating Of The Payphone Service In Ireland



Directory Enquiry Services

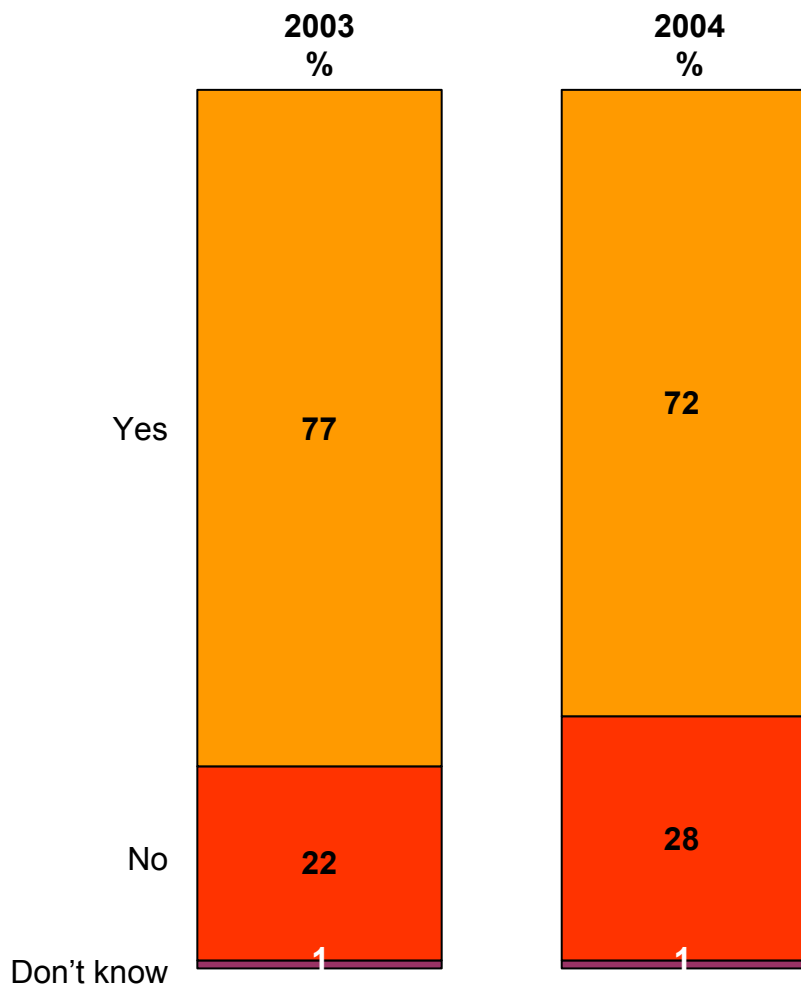
Awareness Of More Than One Directory Enquiry Service Provider In The Market

Base: All Respondents: 516



Whether Ever Make Use Of Directory Enquiry Service

Base: All Respondents: 516

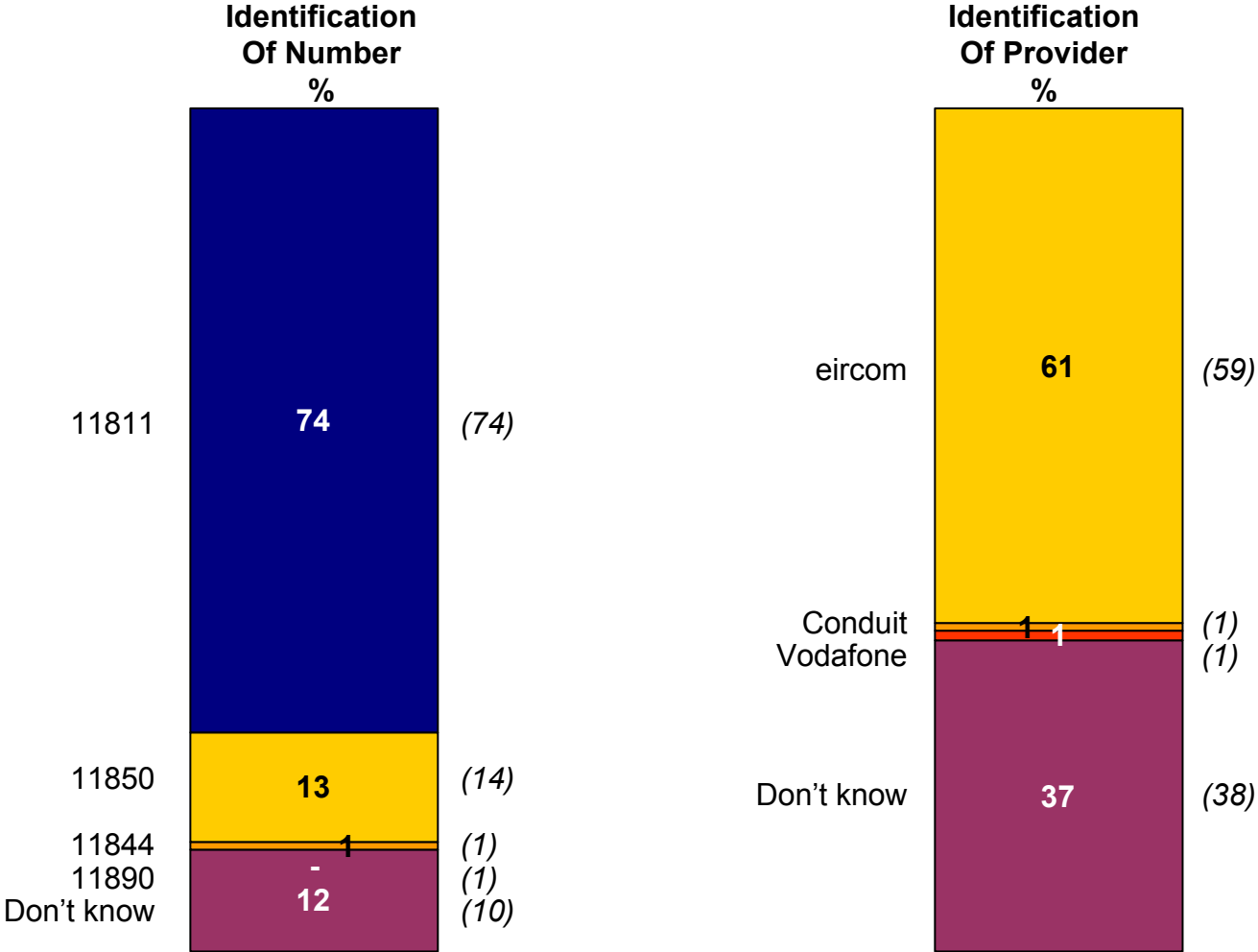


Frequency of Using Service
Base: 377

	2004 %	2003 %
Daily	4	(1)
A few times a week	10	(10)
Once a week	11	(10)
Once every 2 weeks	10	(10)
Once every 3 – 4 weeks	22	(26)
Less often	42	(42)

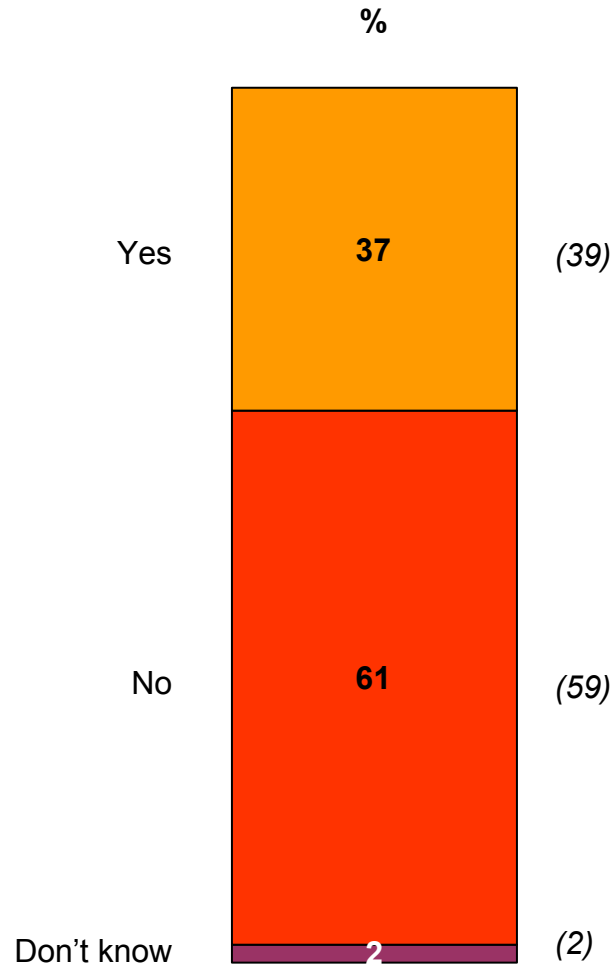
Directory Enquiry Service Used

Base: All who have used a directory enquiry service: 377



Whether Aware Of Cost Of A Directory Enquiry Call From Chosen Service Provider

Base: All who have used a directory enquiry service: 377



Awareness Of Call Completion Service – Where Operator Connects You To The Number You Are Looking For

Base: All who have used a directory enquiry service: 377

