ComReg
Consumer Behaviour Regarding Finding Phone Numbers

Date: April 2018
Job Reference: 297118

Commission for
Communications Regulation

REDC

Research Background & Objectives

/ In 2014, eir, as the designated Universal Service Provider in Ireland, was obligated to ensure that a printed directory of subscribers is made available to all end users in a printed format and ensure that it is updated annually.

/ The current designation period expires on 30 June 2018. As such, the Commission for Communications Regulation (ComReg) is conducting a review of whether there is a continued need for the provision of directory services under a universal service obligation beyond this date.

/ In order to investigate this, ComReg has commissioned RED C Research to conduct market research to assess the usage and attitude towards Directory Services in Ireland. The purpose of the research is to assist ComReg with exploring the following key questions:

  / *What are consumer's options for access to a comprehensive directory of subscribers (including printed and non-printed options)?*

  / *Do consumer's continue to have a reasonable need for the USO service?*

Methodology

/ 1,000 interviews were conducted by phone using RED C's telephone omnibus survey, the RED Express.

/ Respondents were reached using a mix of RDD (random digit dial) landline sample and RDD mobile phone sample. This ensures we reach 98% of the population including mobile only households, landline only households and dual phone households.

/ Quotas are set and final data weighted to known profiles on age, gender, class, region and phone type to ensure that the sample is representative of the total Irish population aged 18+.

/ Interviews were conducted between **15th - 22nd March 2018**.

Profile of Respondents

(Base: All Aged 18+, n=1,000)

Gender

51%

49%

Social Class

ABC1's: 42%

C2DE's: 51%

F's: 6%

Age

18-24	10%
25-34	19%
35-44	21%
45-54	18%
55-64	14%
65+	18%

Region

Conn/ Ulster 18%

Dublin 28%

Rest of Leinster 26%
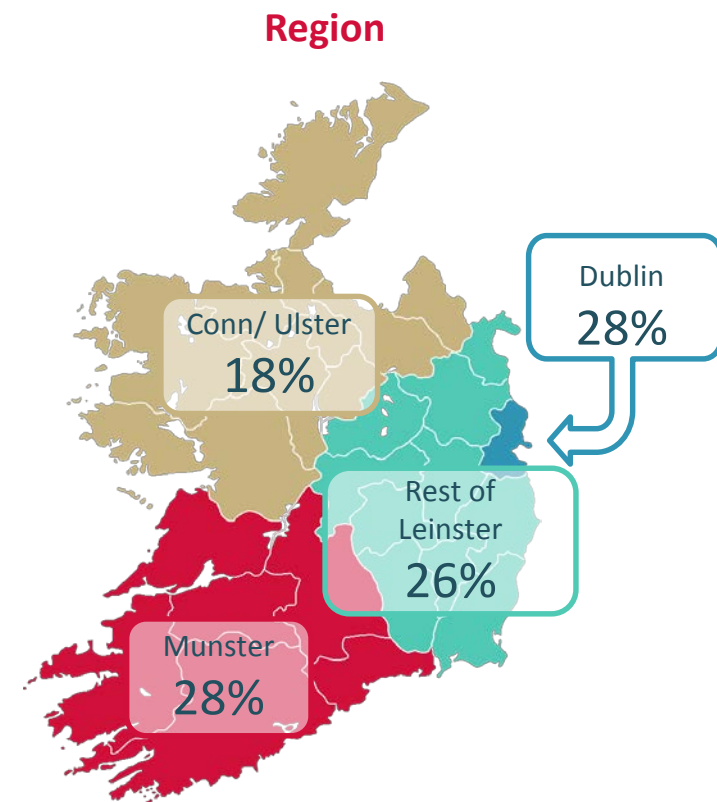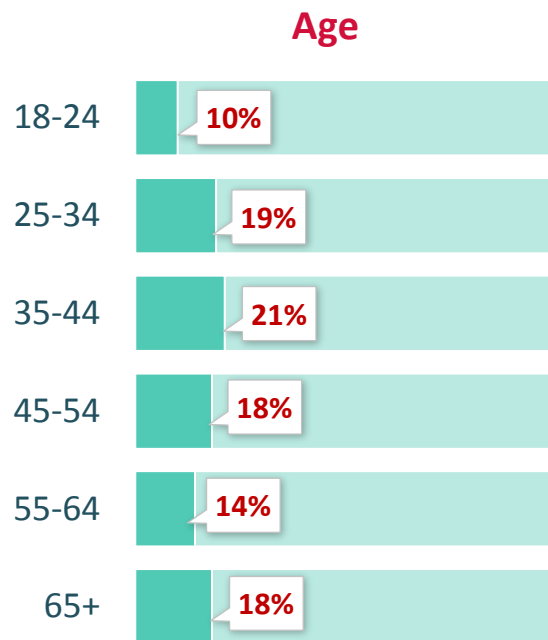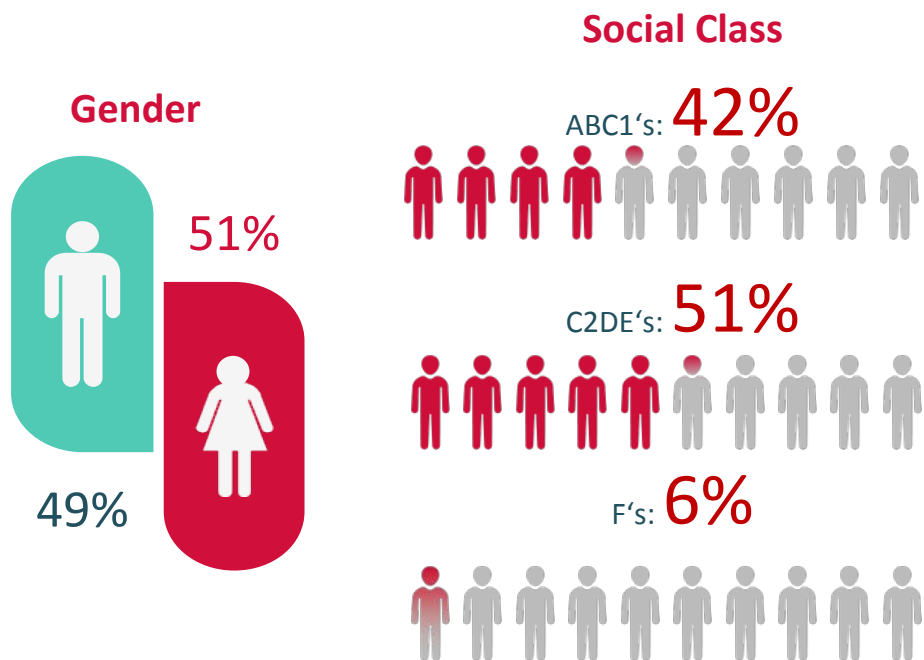
Munster 28%

The sample profile is nationally representative aged 18+.

Type of Telecommunications Services

(Base: All Aged 18+, n=1,000)

	Total	AGE			REGION				SERVICES	
		18-34 (289)	35-54 (391)	55+ (320)	Dublin (280)	Rest Of Leinster (260)	Munster (280)	Conn/ Ulster (180)	Mobile Only (409)	Non-Mobile Only (591)
Mobile Phone service	98%	99%	99%	96%	98%	97%	99%	100%	100%	97%
Any Internet	90%	91%	93%	85%	89%	86%	93%	92%	88%	91%
Fixed Internet/Broadband at home	77%	70%	82%	79%	77%	76%	79%	78%	66%	85%
Home Landline telephone service	59%	32%	56%	86%	54%	59%	60%	64%	-	100%
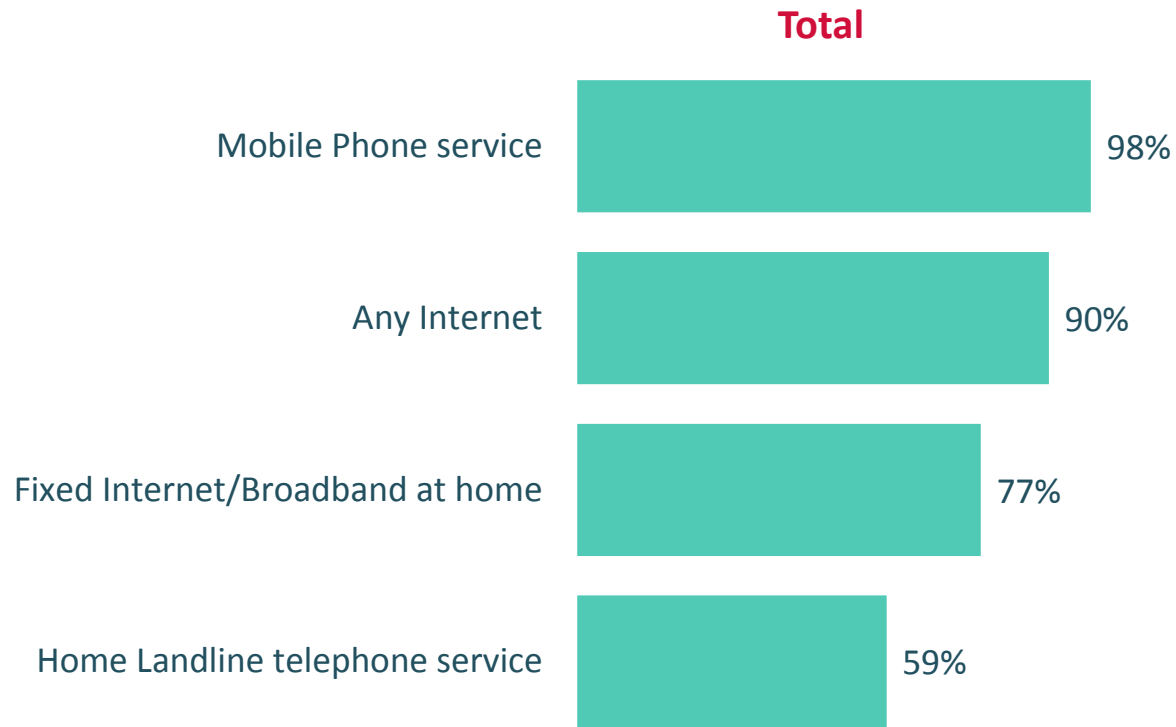
2%
are landline
only users

Mobile ownership is almost universal at 98%. Nearly 3 in 5 (59%) have access to and use a home landline telephone.

Finding A Private Individuals' Phone Number

(Base: All Aged 18+, n=1,000)

■ First Mention ■ Total Mentions

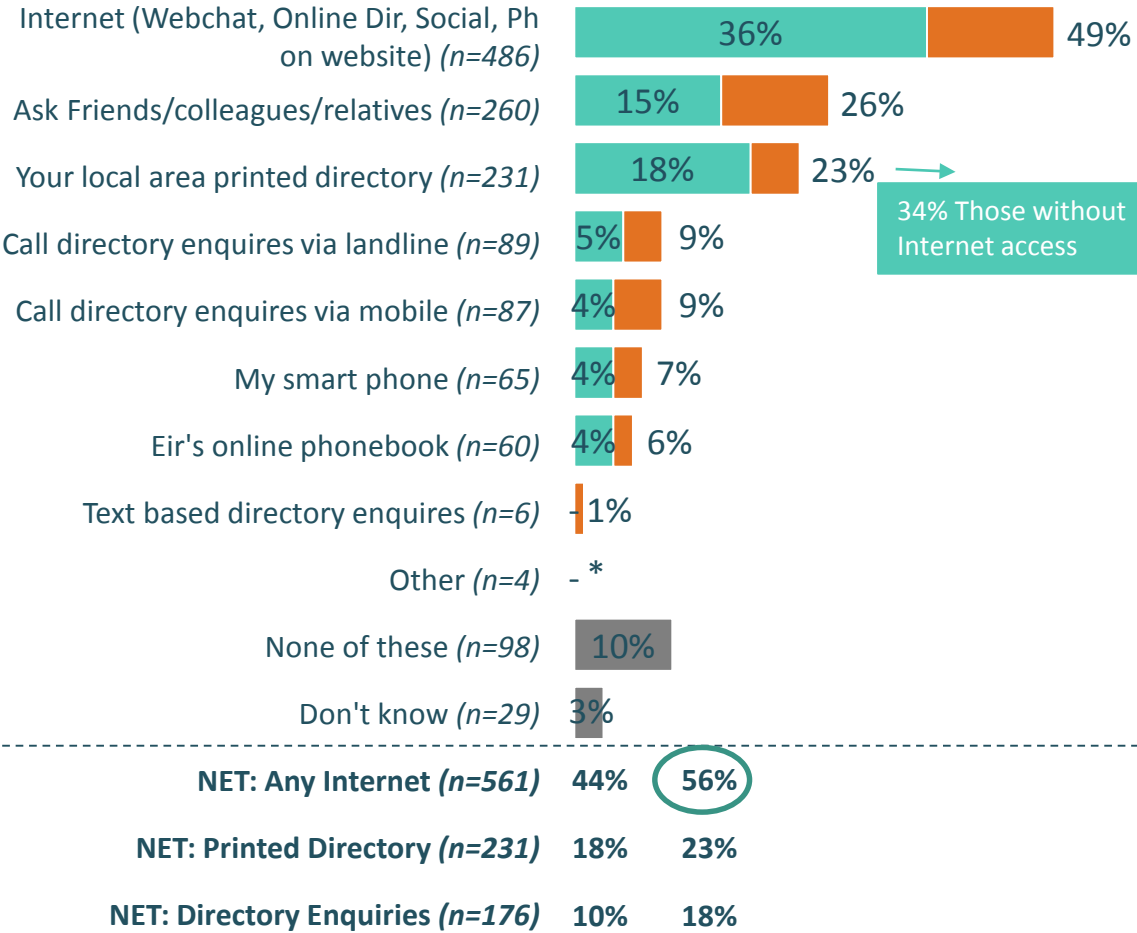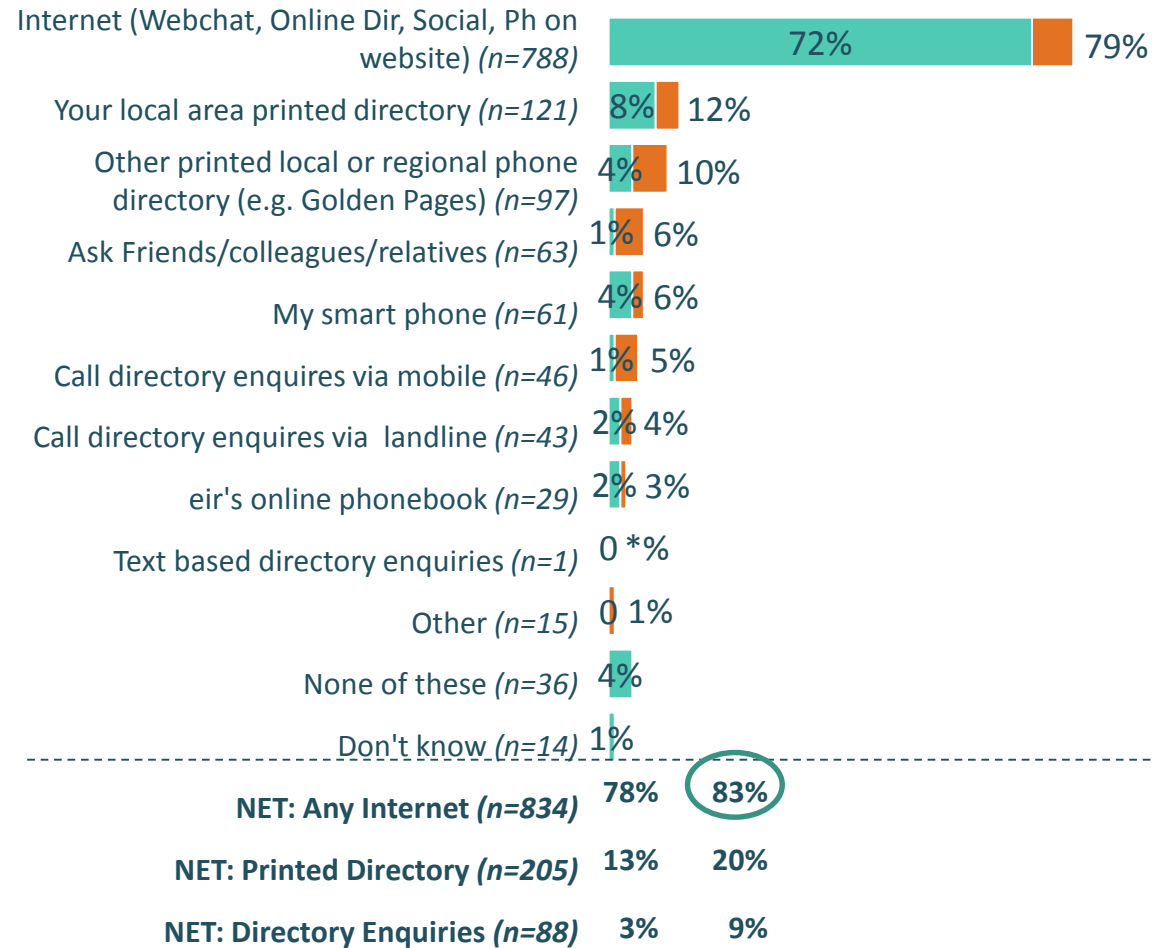|	First Mention	Total Mentions		AGE			REGION				SERVICES	
				18-34 (289)	35-54 (391)	55+ (320)	Dublin (280)	Rest Of Leinster (260)	Munster (280)	Conn/ Ulster (180)	Mobile Only (409)	Non-Mobile Only (591)
Internet (Webchat, Online Dir, Social, Ph on website) (n=486)	36%	49%		55%	53%	37%	52%	51%	49%	39%	55%	44%
Ask Friends/colleagues/relatives (n=260)	15%	26%		32%	25%	23%	27%	25%	28%	24%	30%	24%
Your local area printed directory (n=231)	18%	23%		7%	19%	43%	16%	21%	28%	29%	8%	33%
Call directory enquires via landline (n=89)	5%	9%		4%	7%	16%	6%	10%	8%	12%	-	15%
Call directory enquires via mobile (n=87)	4%	9%		5%	12%	8%	7%	10%	11%	6%	10%	8%
My smart phone (n=65)	4%	7%		7%	7%	5%	7%	6%	5%	9%	5%	7%
Eir's online phonebook (n=60)	4%	6%		2%	6%	9%	3%	7%	9%	5%	4%	7%
Text based directory enquires (n=6)		1%		-	*	2%	*	-	2%	-	-	1%
Other (n=4)		*		-	1%	*	*	1%	-	*	*	*
None of these (n=98)	10%			12%	10%	8%	12%	8%	5%	16%	13%	8%
Don't know (n=29)	3%			6%	2%	1%	6%	2%	2%	1%	4%	2%
NET: Any Internet (n=561)	44%	56%		59%	61%	47%	57%	60%	57%	47%	60%	53%
NET: Printed Directory (n=231)	18%	23%		7%	19%	43%	16%	21%	28%	29%	8%	33%
NET: Directory Enquiries (n=176)	10%	18%		8%	18%	26%	12%	20%	20%	18%	10%	23%

34% Those without Internet access

The most popular source for finding a person's phone number is the internet this 56% using this medium. 43% of those 55+ using local area printed directory

RED C

(Q.2A)

6

Finding A Business Phone Number

(Base: All Aged 18+, n=1,000)

■ First Mention　■ Total Mentions

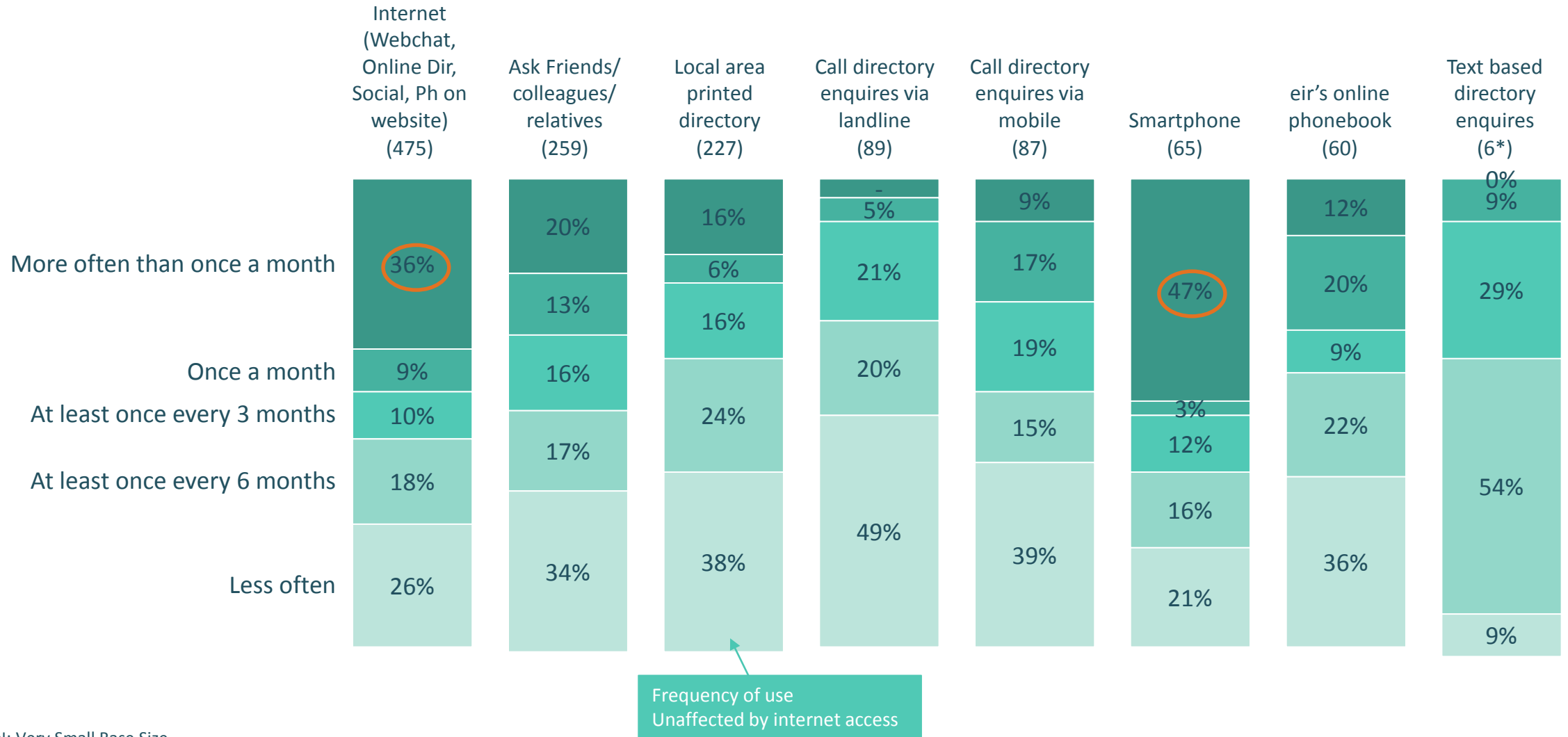|	First Mention	Total Mentions	AGE			REGION				SERVICES	
			18-34 (289)	35-54 (391)	55+ (320)	Dublin (280)	Rest Of Leinster (260)	Munster (280)	Conn/ Ulster (180)	Mobile Only (409)	Non-Mobile Only (591)
Internet (Webchat, Online Dir, Social, Ph on website) (n=788)	72%	79%	89%	84%	63%	80%	79%	78%	79%	88%	73%
Your local area printed directory (n=121)	8%	12%	4%	8%	25%	9%	11%	13%	17%	4%	18%
Other printed local or regional phone directory (e.g. Golden Pages) (n=97)	4%	10%	3%	7%	19%	8%	11%	11%	9%	6%	12%
Ask Friends/colleagues/relatives (n=63)	1%	6%	6%	5%	8%	6%	10%	4%	4%	7%	6%
My smart phone (n=61)	4%	6%	6%	7%	5%	6%	9%	3%	6%	4%	7%
Call directory enquires via mobile (n=46)	1%	5%	3%	6%	4%	4%	6%	6%	3%	6%	3%
Call directory enquires via landline (n=43)	2%	4%	0	3%	10%	4%	4%	5%	5%	0	7%
eir's online phonebook (n=29)	2%	3%	1%	3%	5%	2%	2%	5%	2%	2%	3%
Text based directory enquiries (n=1)	0	*%	0	0	*	0	0	*	0	0	*
Other (n=15)	0	1%	1%	1%	2%	1%	2%	2%	2%	1%	2%
None of these (n=36)	4%		5%	2%	4%	5%	2%	2%	7%	4%	4%
Don't know (n=14)	1%		2%	1%	1%	3%	1%	1%	1%	2%	1%
NET: Any Internet (n=834)	78%	83%	92%	89%	68%	83%	85%	82%	83%	90%	79%
NET: Printed Directory (n=205)	13%	20%	7%	15%	39%	16%	21%	22%	25%	9%	28%
NET: Directory Enquiries (n=88)	3%	9%	3%	9%	14%	7%	10%	10%	8%	6%	11%

The internet is comfortably the most popular method of sourcing a business phone number, with 83% going online.
This is particularly prevalent among younger adults. 1 in 4 adults 55+ using the local area printed directory

*Note: 'Any Internet' is a net of 'Internet', 'Smartphone' and 'eir Online Directory'

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Frequency Of Use - Sourcing A Private Individual's Number

(Base: All Using Each Service)

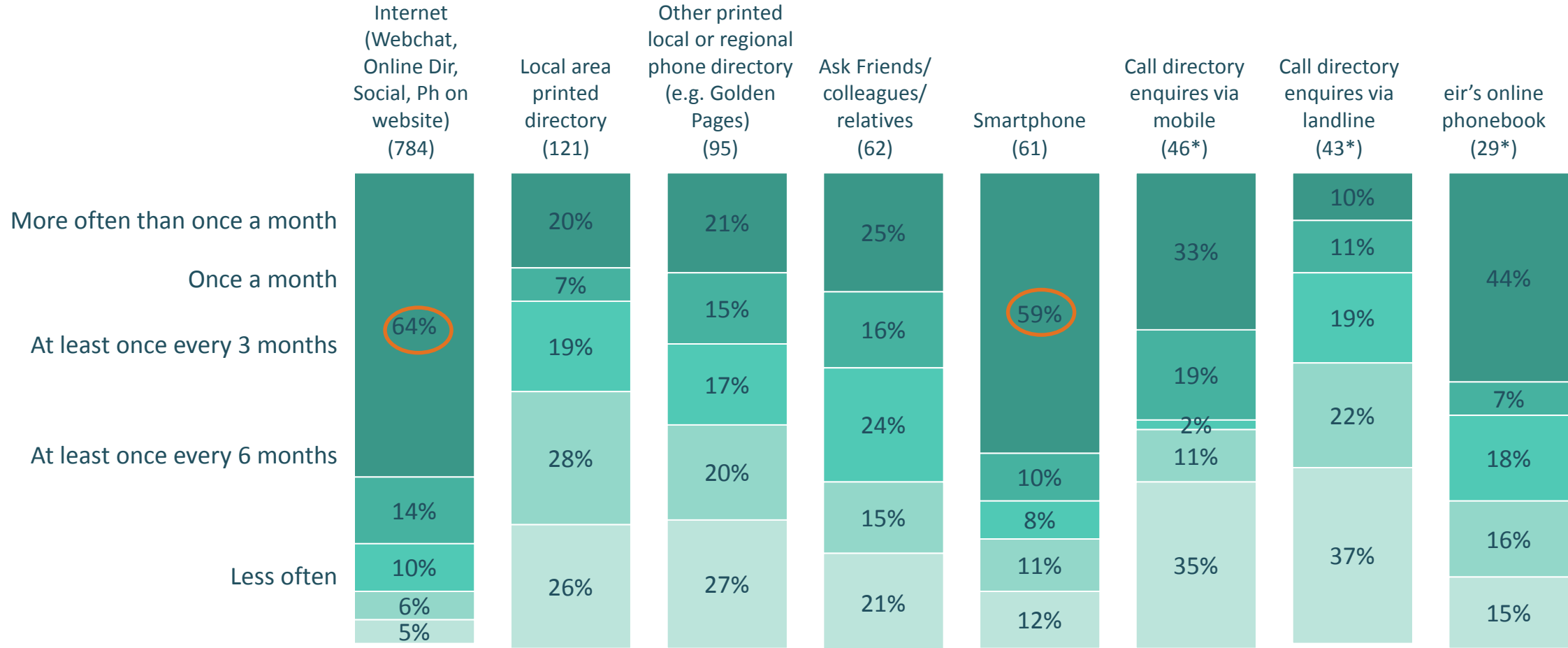|	Internet (Webchat, Online Dir, Social, Ph on website) (475)	Ask Friends/ colleagues/ relatives (259)	Local area printed directory (227)	Call directory enquires via landline (89)	Call directory enquires via mobile (87)	Smartphone (65)	eir's online phonebook (60)	Text based directory enquires (6*)
More often than once a month	36%	20%	16%	5%	9%	47%	12%	0% / 9%
		13%	6%	21%	17%		20%	29%
			16%		19%		9%	
Once a month	9%	16%	16%	20%		3%	22%	
At least once every 3 months	10%	17%	24%		15%	12%		54%
At least once every 6 months	18%			49%		16%	36%	
Less often	26%	34%	38%		39%	21%		9%

Frequency of use
Unaffected by internet access

*CAUTION: Very Small Base Size

Over a third (36%) of those using the internet to find a phone number do so more often than once a month.
Frequency of use is also high for those using their Smartphone to find a number.

Frequency Of Use - Sourcing A Business Phone Number
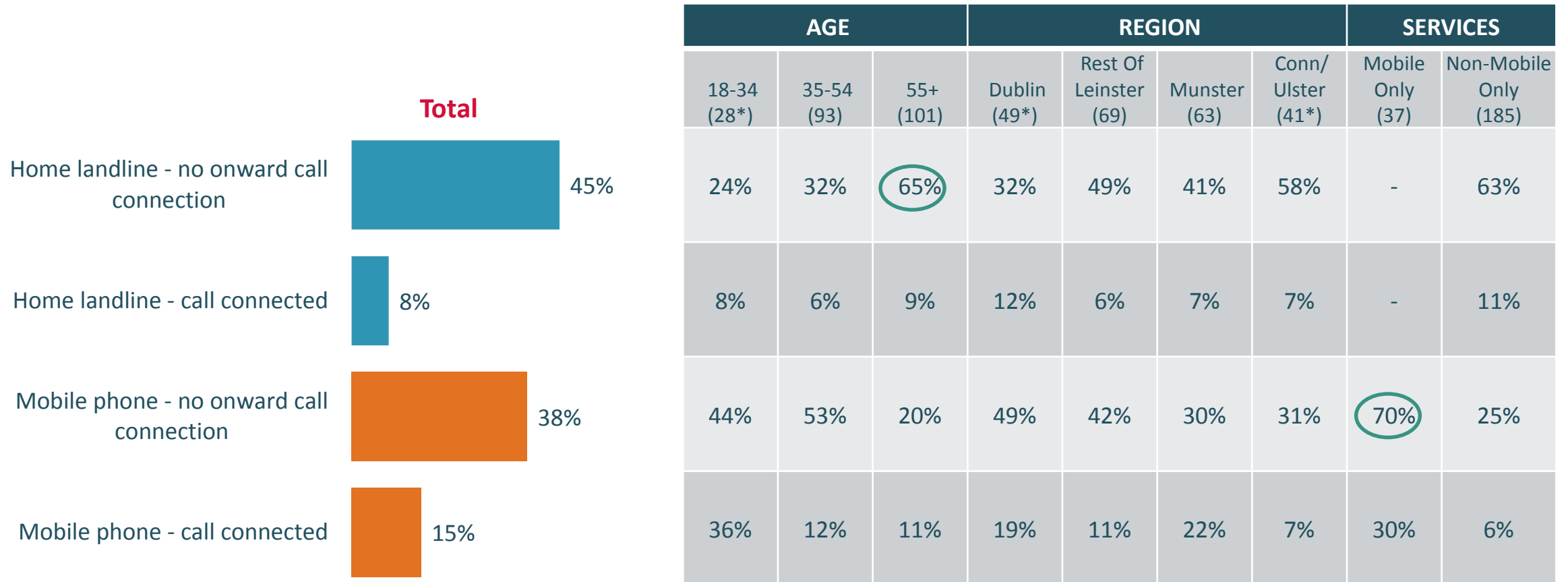
(Base: All Using Each Service)

	Internet (Webchat, Online Dir, Social, Ph on website) (784)	Local area printed directory (121)	Other printed local or regional phone directory (e.g. Golden Pages) (95)	Ask Friends/ colleagues/ relatives (62)	Smartphone (61)	Call directory enquires via mobile (46*)	Call directory enquires via landline (43*)	eir's online phonebook (29*)
More often than once a month	64%	20%	21%	25%	59%	33%	10%	44%
Once a month		7%	15%	16%			11%	
At least once every 3 months		19%	17%	24%		19%	19%	7%
At least once every 6 months	14%	28%	20%	15%	10%	2% / 11%	22%	18%
Less often	10% / 6% / 5%	26%	27%	21%	8% / 11% / 12%	35%	37%	16% / 15%

*CAUTION: Very Small Base Size

Nearly 2 in 3 (64%) of those using the internet to source a business phone number do so more often than once a month. Frequency of use is also higher for those using their Smartphone to find a number.

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How Do You Typically Access Directory Enquiries

(Base : All Using Directory Enquiries By Landline Or Mobile Personal or Business, n=222)

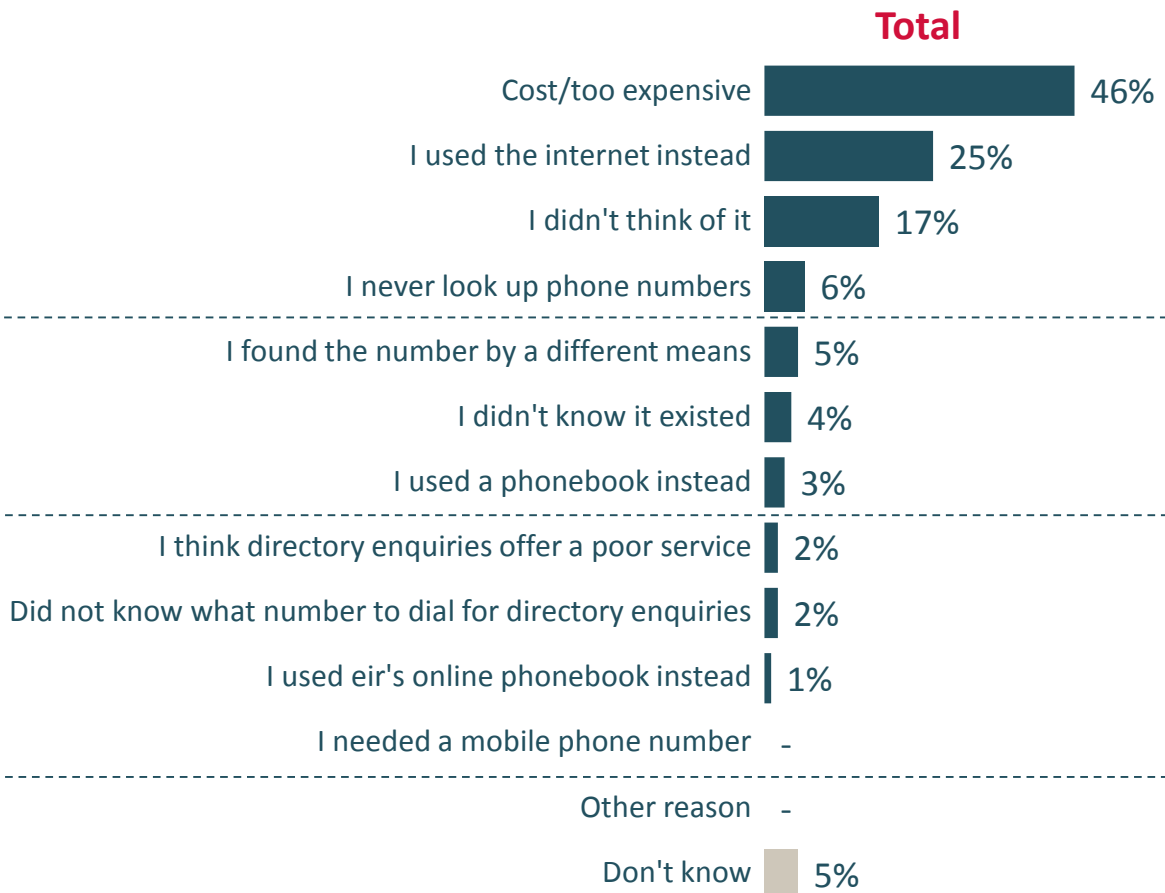|	Total	AGE			REGION				SERVICES	
		18-34 (28*)	35-54 (93)	55+ (101)	Dublin (49*)	Rest Of Leinster (69)	Munster (63)	Conn/ Ulster (41*)	Mobile Only (37)	Non-Mobile Only (185)
Home landline - no onward call connection	45%	24%	32%	65%	32%	49%	41%	58%	-	63%
Home landline - call connected	8%	8%	6%	9%	12%	6%	7%	7%	-	11%
Mobile phone - no onward call connection	38%	44%	53%	20%	49%	42%	30%	31%	70%	25%
Mobile phone - call connected	15%	36%	12%	11%	19%	11%	22%	7%	30%	6%

*CAUTION: Very Small Base Size

The most common method of accessing directory enquiries is via a landline with no onward call connection (45%).
Those calling from mobile are also more likely not to have the call connected.

(Q.5A)

10

Reasons For Not Using Directory Enquiries

(Base : All Not Using Directory Enquiries, n=773)

	Total	AGE			REGION				SERVICES	
		18-34 (203)	35-54 (318)	55+ (252)	Dublin (263)	Rest Of Leinster (195)	Munster (199)	Conn/ Ulster (116)	Mobile Only (230)	Non-Mobile Only (543)
Cost/too expensive	46%	28%	55%	53%	33%	50%	51%	52%	40%	50%
I used the internet instead	25%	31%	27%	15%	27%	25%	24%	23%	27%	24%
I didn't think of it	17%	24%	16%	10%	15%	17%	16%	19%	22%	13%
I never look up phone numbers	6%	6%	3%	11%	5%	9%	5%	6%	7%	6%
I found the number by a different means	5%	4%	4%	6%	4%	5%	6%	4%	3%	6%
I didn't know it existed	4%	8%	3%	1%	8%	3%	1%	2%	6%	2%
I used a phonebook instead	3%	-	1%	8%	5%	*	3%	3%	1%	4%
I think directory enquiries offer a poor service	2%	2%	2%	1%	3%	2%	1%	*	2%	2%
Did not know what number to dial for directory enquiries	2%	2%	1%	2%	3%	1%	2%	2%	1%	3%
I used eir's online phonebook instead	1%	-	1%	1%	*	1%	1%	*	*	1%
I needed a mobile phone number	-	*	*	*	1%	*	*	-	*	*
Other reason	-	*	-	1%	1%	*	-	-	-	1%
Don't know	5%	10%	3%	2%	10%	3%	4%	1%	7%	3%

*CAUTION: Very Small Base Size

The most commonly cited reason for not using directory enquiries is cost. However, among younger adults (31%) say that they use the internet instead.

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Reasons For Not Using Local Area Printed Directory

(Base : All Not Using Phonebook, n=698)
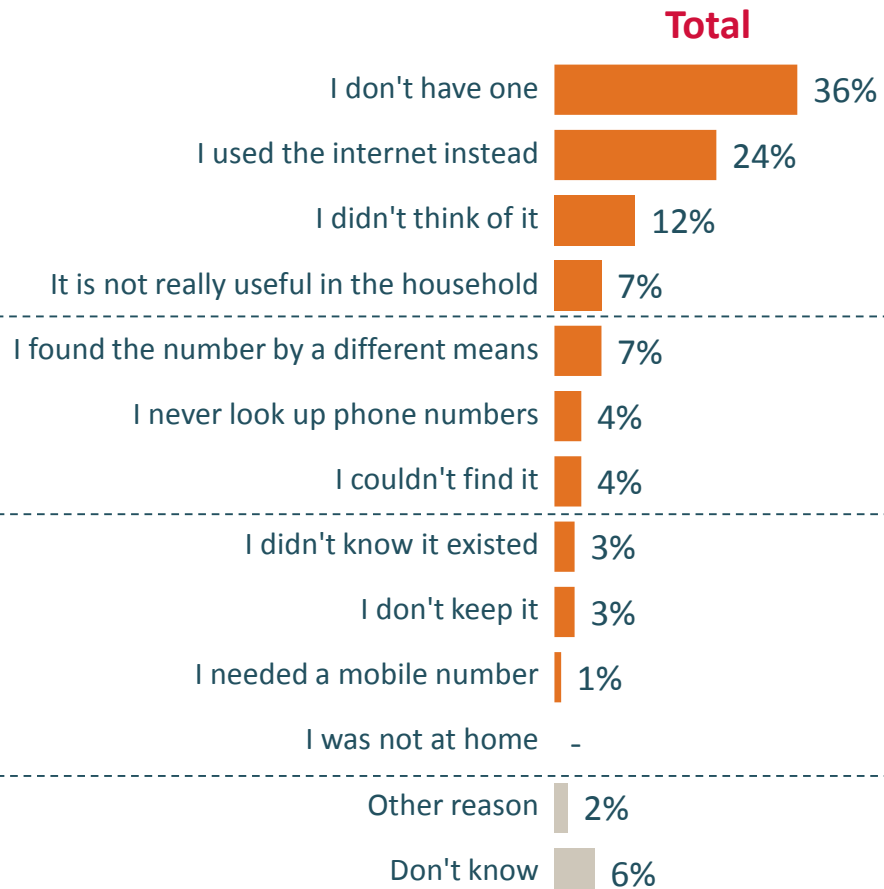
	Total	AGE			REGION			
		18-34 (254)	35-54 (289)	55+ (155)	Dublin (221)	Rest Of Leinster (181)	Munster (181)	Conn/ Ulster (116)
I don't have one	36%	34%	42%	25%	32%	38%	37%	37%
I used the internet instead	24%	25%	26%	20%	25%	26%	21%	26%
I didn't think of it	12%	16%	11%	9%	14%	11%	12%	12%
It is not really useful in the household	7%	6%	6%	11%	9%	4%	8%	11%
I found the number by a different means	7%	6%	7%	9%	6%	5%	8%	11%
I never look up phone numbers	4%	4%	3%	6%	4%	4%	5%	6%
I couldn't find it	4%	1%	3%	9%	4%	7%	3%	-
I didn't know it existed	3%	5%	2%	2%	6%	1%	3%	1%
I don't keep it	3%	1%	4%	4%	2%	3%	4%	2%
I needed a mobile number	1%	*	1%	4%	*	2%	2%	1%
I was not at home	-	-	1%	-	*	*	1%	-
Other reason	2%	1%	4%	2%	1%	2%	2%	4%
Don't know	6%	9%	2%	7%	11%	3%	4%	1%

*CAUTION: Very Small Base Size

More than a third (36%) are not using a local area printed directory because they do not have one, while almost a quarter (24%) opt to use the internet instead. Mobile Only users more likely to say they don't have a phone book.

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Reasons For Not Using eir's Online Phonebook

(Base : All Not Using Phonebook, n=931)
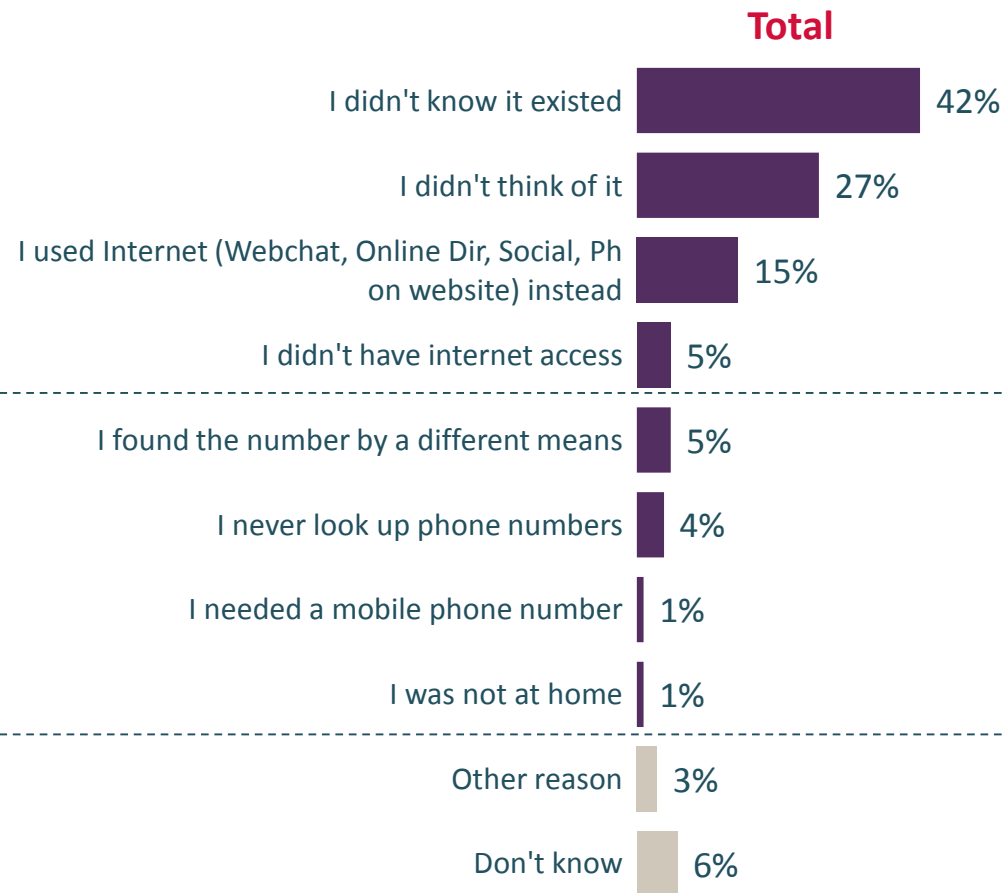
	Total	AGE			REGION				SERVICES	
		18-34 (282)	35-54 (362)	55+ (287)	Dublin (270)	Rest Of Leinster (239)	Munster (252)	Conn/ Ulster (170)	Mobile Only (389)	Non-Mobile Only (543)
I didn't know it existed	42%	47%	47%	31%	38%	42%	43%	47%	46%	39%
I didn't think of it	27%	27%	26%	29%	27%	25%	31%	23%	24%	29%
I used Internet (Webchat, Online Dir, Social, Ph on website) instead	15%	15%	15%	13%	19%	15%	10%	13%	16%	14%
I didn't have internet access	5%	2%	5%	9%	4%	9%	3%	5%	4%	6%
I found the number by a different means	5%	2%	5%	8%	4%	3%	7%	6%	3%	6%
I never look up phone numbers	4%	5%	2%	5%	4%	4%	4%	4%	5%	3%
I needed a mobile phone number	1%	1%	1%	*	*	1%	1%	1%	1%	*
I was not at home	1%	*	*	1%	-	1%	2%	*	1%	*
Other reason	3%	1%	4%	3%	2%	4%	3%	2%	2%	3%
Don't know	6%	8%	3%	7%	10%	3%	5%	3%	7%	5%

*CAUTION: Very Small Base Size

Lack of knowledge is the most prominent reason for not using eir's Online Phonebook at 42%. More than 1 in 4 (27%) also say they didn't think of it, while 15% used another internet service instead.

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Action Taken If Phonebook No Longer Available

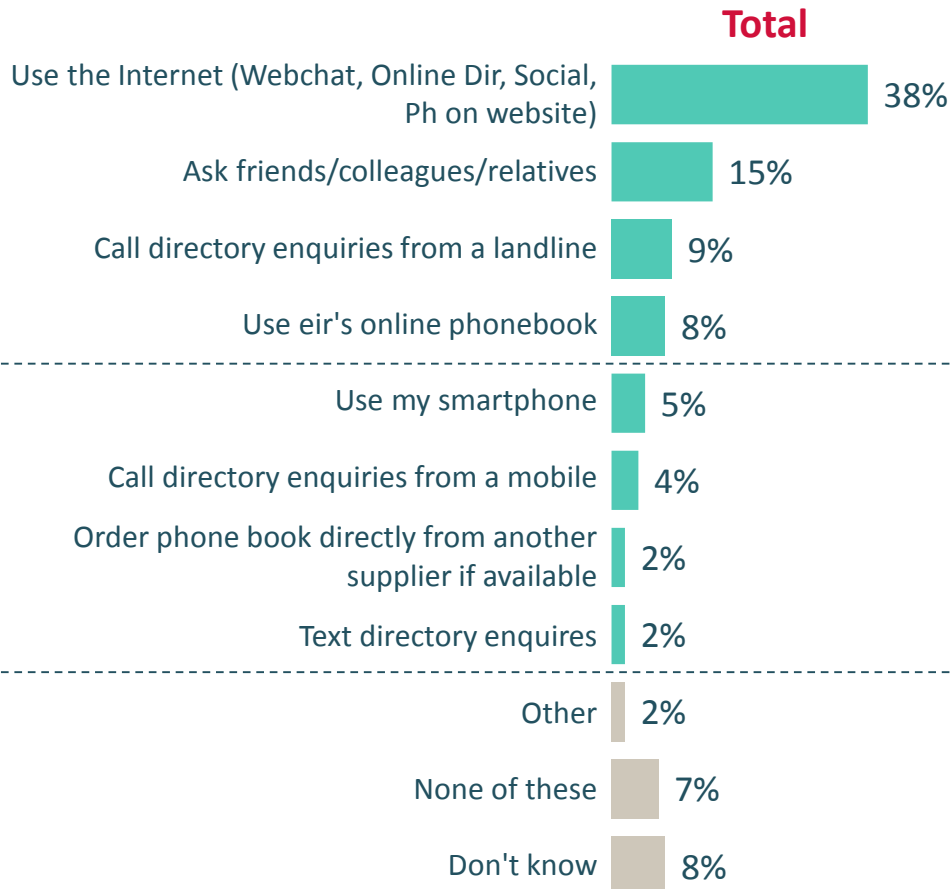(Base : All Users of Phonebook Personal/Business, n=297)

	Total	AGE			REGION				SERVICES	
		18-34 (34*)	35-54 (100)	55+ (163)	Dublin (58)	Rest Of Leinster (78)	Munster (97)	Conn/ Ulster (64)	Mobile Only (57)	Non-Mobile Only (240)
Use the Internet (Webchat, Online Dir, Social, Ph on website)	38%	61%	40%	33%	30%	35%	43%	42%	54%	34%
Ask friends/colleagues/relatives	15%	4%	13%	18%	9%	20%	17%	10%	7%	17%
Call directory enquiries from a landline	9%	-	3%	15%	11%	11%	7%	10%	-	11%
Use eir's online phonebook	8%	9%	10%	7%	12%	5%	12%	3%	8%	8%
Use my smartphone	5%	11%	9%	2%	5%	8%	3%	5%	6%	5%
Call directory enquiries from a mobile	4%	5%	5%	3%	5%	1%	5%	5%	8%	3%
Order phone book directly from another supplier if available	2%	-	5%	1%	1%	3%	1%	4%	3%	2%
Text directory enquires	2%	-	5%	-	5%	-	-	3%	8%	-
Other	2%	8%	1%	1%	1%	1%	3%	1%	-	2%
None of these	7%	0	7%	8%	4%	6%	4%	13%	4%	7%
Don't know	8%	2%	3%	13%	17%	10%	4%	5%	1%	10%

*CAUTION: Very Small Base Size

38% of phonebook users would use the internet to find a phone number in the event of the phonebook no longer being available, driven by younger adults.

(Q.7)

14

Action Taken If Phonebook No Longer Available

(Base : All Users of Phonebook Personal/Business, n=297)
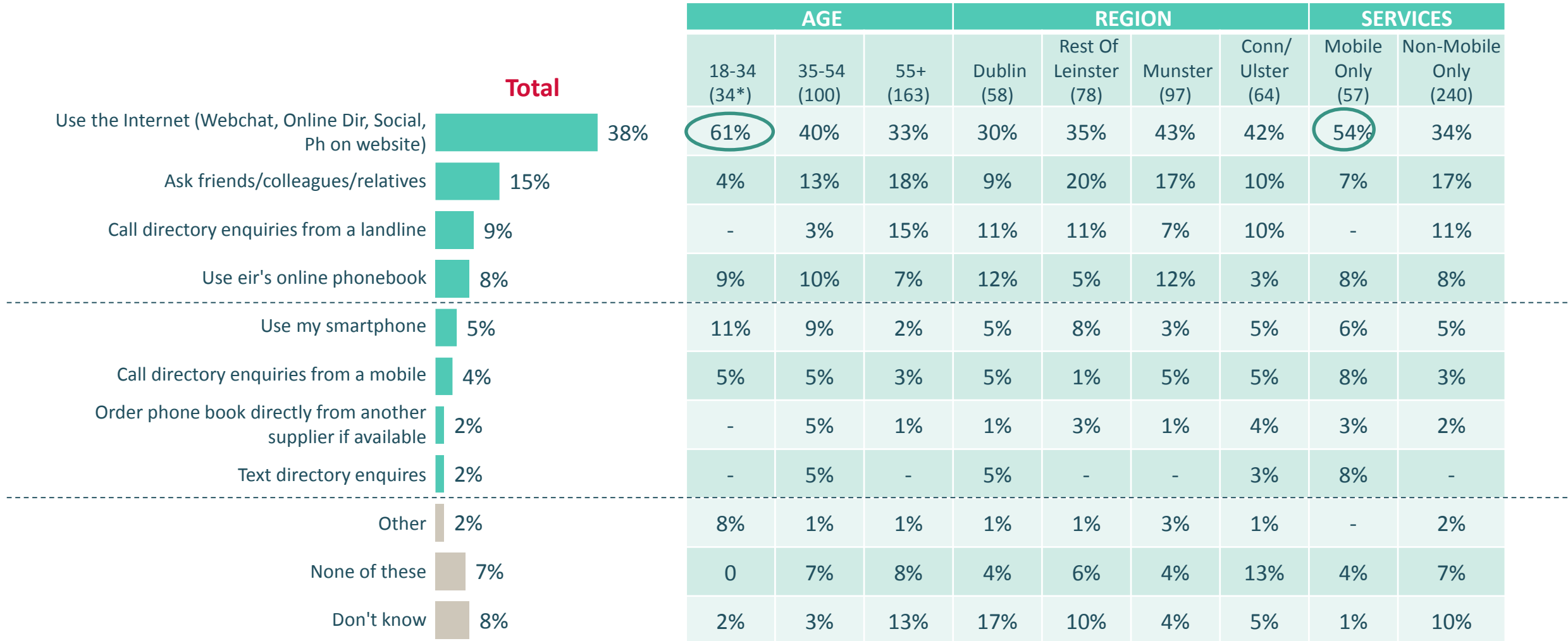
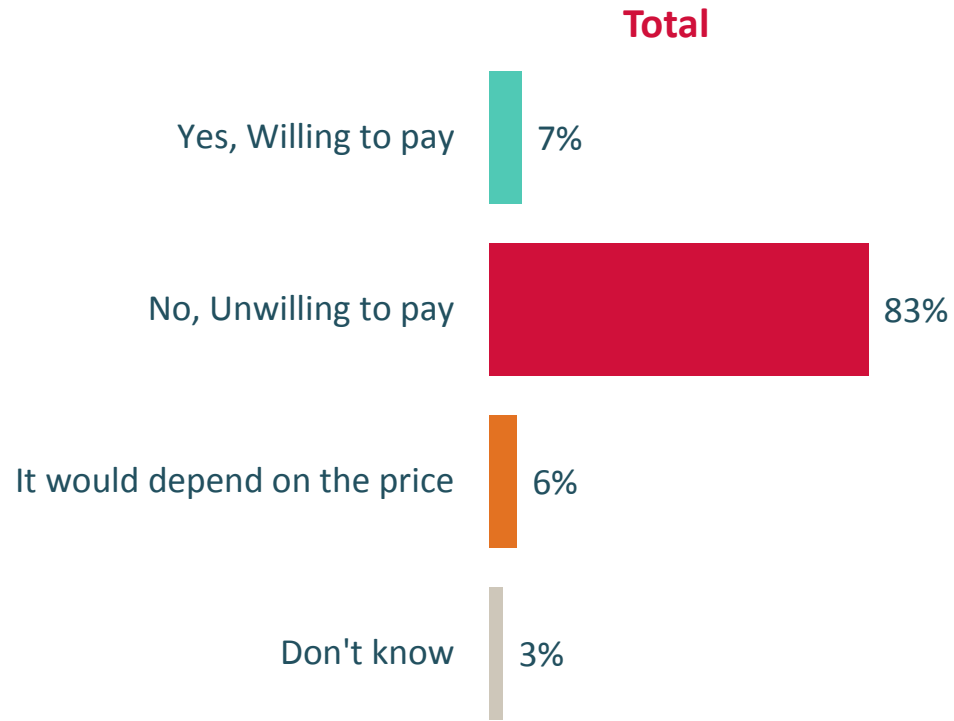|	Total	FREQUENCY OF USING LOCAL AREA PRINTED DIRECTORY TO FIND A PRIVATE INDIVIDUAL'S PHONE NUMBER			
		>Once a month (n=37*)	At least monthly (n=52*)	At least 2-4 times per year (n=89*)	Less often (86*)
Use the Internet (Webchat, Online Dir, Social, Ph on website)	38%	50%	42%	32%	38%
Ask friends/colleagues/relatives	15%	18%	16%	21%	14%
Call directory enquiries from a landline	9%	9%	10%	9%	8%
Use eir's online phonebook	8%	6%	9%	9%	6%
Use my smartphone	5%	1%	7%	3%	7%
Call directory enquiries from a mobile	4%	5%	4%	5%	5%
Order phone book directly from another supplier if available	2%	5%	4%	0	0
Text directory enquires	2%	0	0	0	3%
Other	2%	0	0	4%	1%
None of these	7%	4%	4%	2%	12%
Don't know	8%	1%	5%	14%	7%

*CAUTION: Very Small Base Size

38% of phonebook users would use the internet to find a phone number in the event of the phonebook no longer being available.

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Paying for a Printed Phonebook

(Base: All Aged 18+, n=1,000)

Total

Yes, Willing to pay		7%	
No, Unwilling to pay		83%	
It would depend on the price		6%	
Don't know		3%	

Willingness to Pay existing Printed Directory Users – 15%

*CAUTION: Very Small Base Size

	AGE			REGION				SERVICES	
	18-34 (289)	35-54 (391)	55+ (320)	Dublin (280)	Rest Of Leinster (260)	Munster (280)	Conn/ Ulster (180)	Mobile Only (409)	Non-Mobile Only (591)
Yes, Willing to pay	7%	5%	9%	6%	6%	8%	8%	5%	8%
No, Unwilling to pay	82%	89%	78%	82%	86%	84%	80%	89%	80%
It would depend on the price	5%	5%	9%	3%	6%	7%	11%	3%	9%
Don't know	6%	1%	3%	8%	1%	1%	1%	3%	3%

Little willingness to pay for a printed phonebook exists, with the majority (83%) stating that they would be unwilling to pay.

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Amount Willing To Pay For A Printed Phonebook (Euros)

(Base : All Willing To/Might Pay For Phonebook, n=135)

Average Amount Willing To Pay*

Total Average (n=135)	18-34 Year Olds (n=34)	35-54 Year Olds (n=41)	55+ Year Olds (n=60)	Dublin Residents (n=25)	Rest Of Leinster Residents (n=33)	Munster Residents (n=43)	Conn/Ulster Residents (n=34)
€11.67	€12.61	€7.55	€14.53	€8.85	€17.15	€11.02	€9.65
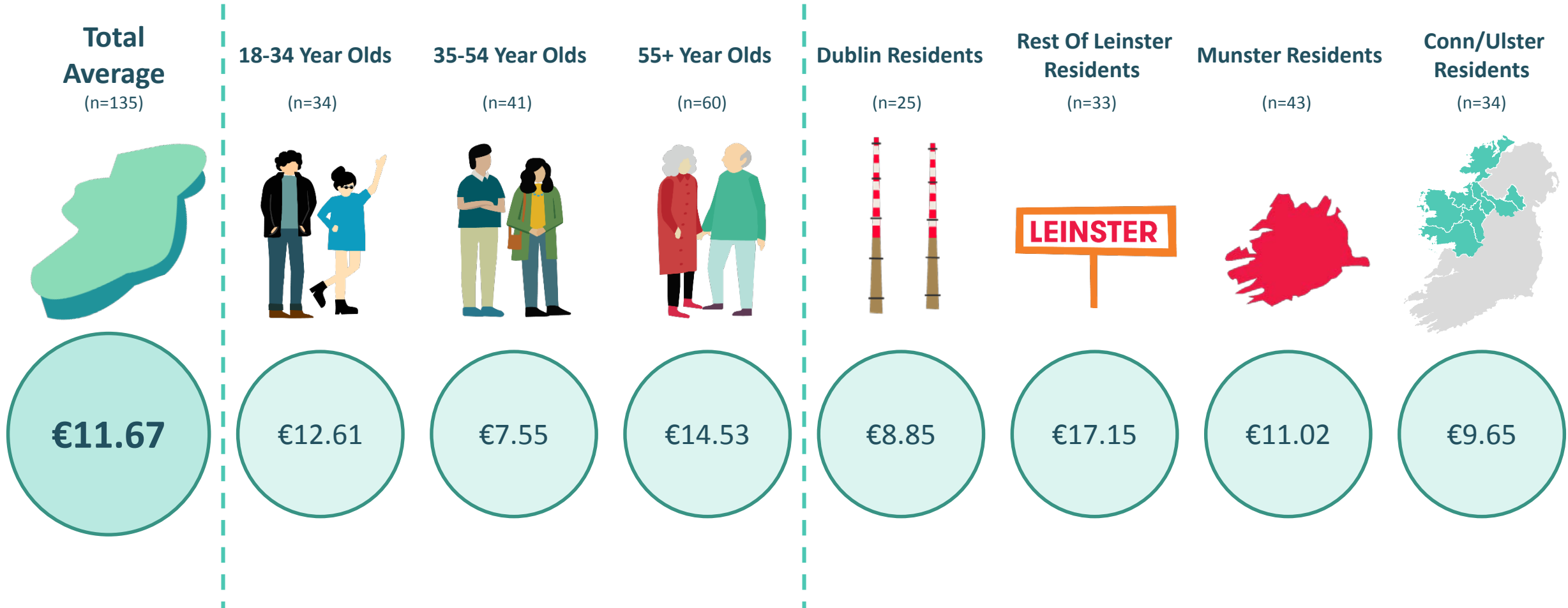
* Small base on sub analysis

Of those that would/might pay for a printed phonebook, the average amount willing to be paid is €11.67. This grows to €17.15 amongst Rest of Leinster residents.

Summary of Key Findings

/ Mobile phone ownership is almost universal amongst Irish adults (98%), while 59% have access to and use a landline telephone service.

/ The internet is the most popular source for finding both a personal individual's phone number and a business phone number at 56% and 83% respectively. This is driven by younger adults with those aged 55+ still likely to use the local printed directory. Regionally Conn/Ulster more reliant on printed directory than Dublin.

/ When looking for an individual's phone number, approximately 1 in 4 (26% and 23% respectively) ask friends/family and/or use their local printed directory, however for those looking for a business phone number, internet dominates, with low levels of use for all other sources.

/ Usage of the eir printed directory is significantly higher than usage of eir's online directory in terms of looking up both a private individual's number and a business number.

/ As well as the internet being used more to find a personal or business number it is also used more frequently than other sources. 36% use the internet more often than once a month to find a personal number while 47% of those using their smartphone to find a number do so more often than once a month.

/ Nearly 2 in 3 (64%) of those using the internet to source a business phone number do so more often than once a month.

/ The most common method of accessing directory enquiries is via a landline with no onward call connection (45%). Those calling from mobile are also more likely not to have the call connected.

/ Cost is a barrier for 46% of those that do not use a directory enquiries service. 1 in 4 say they use the internet instead, rising to 31% amongst 18-34 year olds.

/ Amongst those that do not use a printed phonebook, over a third (36%) claim that the reason for this is that they do not own one. Almost a quarter (24%) of those not using the phonebook opt to use the internet in order to find a number.

/ Lack of knowledge is the most prominent reason for not using eir's Online Phonebook at 42%. More than 1 in 4 (27%) also say they didn't think of it, while 15% used another internet service instead.

/ 38% of phonebook users would use the internet to find a phone number in the event of the phonebook no longer being available, driven by younger adults.

/ Little willingness to pay for a printed phonebook exists, with the majority (83%) stating that they would be unwilling to pay. Existing phone book users are more willing to pay for the phone book (15%)

/ However, amongst those that would/might pay for a printed phonebook, the average amount willing to be paid is €11.67.

THANK YOU

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