An Coimisiún um
Rialáil Cumarsáide
Commission for
Communications Regulation

Mobile Consumer Experience

Survey of Consumers

Summer 2022

ComReg 22/83

B&A RESEARCH & INSIGHT

The Research Perspective

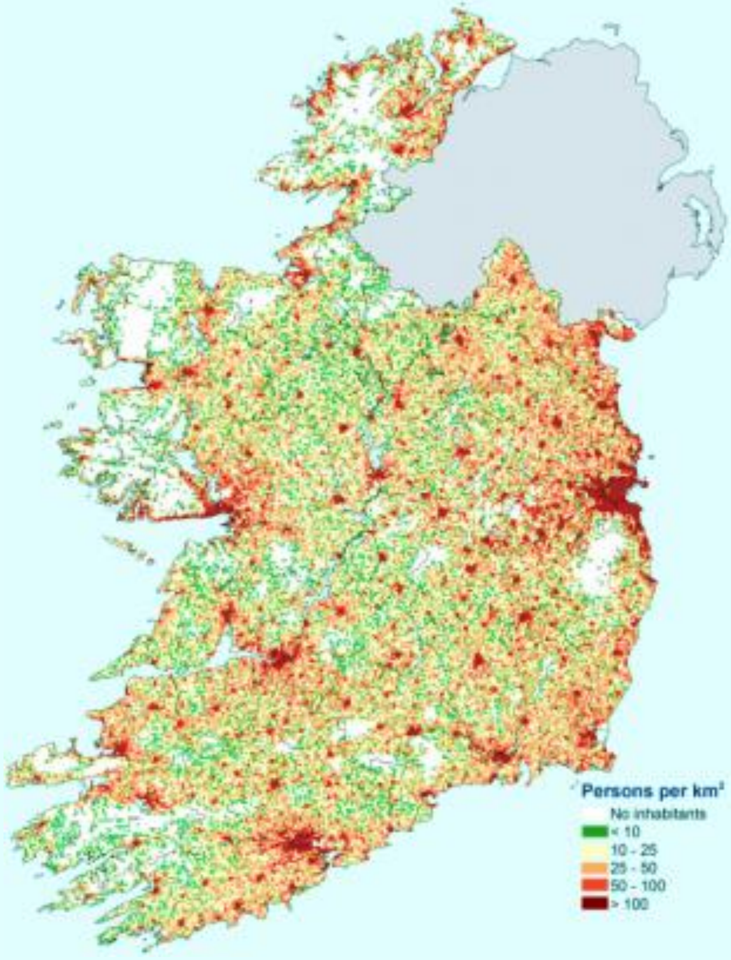
Introduction

Research methodology

- Fieldwork for this study was conducted between **April and July 2022**.
- A similar methodology was used to retain comparability with the 2017 and 2019 mobile customer experience reviews. These are available on the ComReg website.
- The data for this research was collected via a '**face to face**' methodology, interviewing respondents via CAPI (Computer Aided Personal Interviewing), with interviews administered at the respondents' home – 2,991 respondents were interviewed in total.
- The total sample was split across five distinct segments, based on **population density**, with a higher proportion of interviews conducted in areas of lower population density.
- Within each segment, **interlocking quotas** were applied across gender and age to ensure the findings are representative of Irish adults aged 18+ living in each area. Note, the 2017 study was based on adults aged 15+ but the data was rerun in 2019 based on all adults 18+ and now comparisons across the three years are now valid.
- A corrective weight was applied to the data within each segment to ensure it is fully representative of all adults. The total sample of 2,991 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 2,991 is +/-2%pts. For smaller sub-samples the margin will be greater.

Sample size and population density

	Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
Sample Size	598	599	598	597	599
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



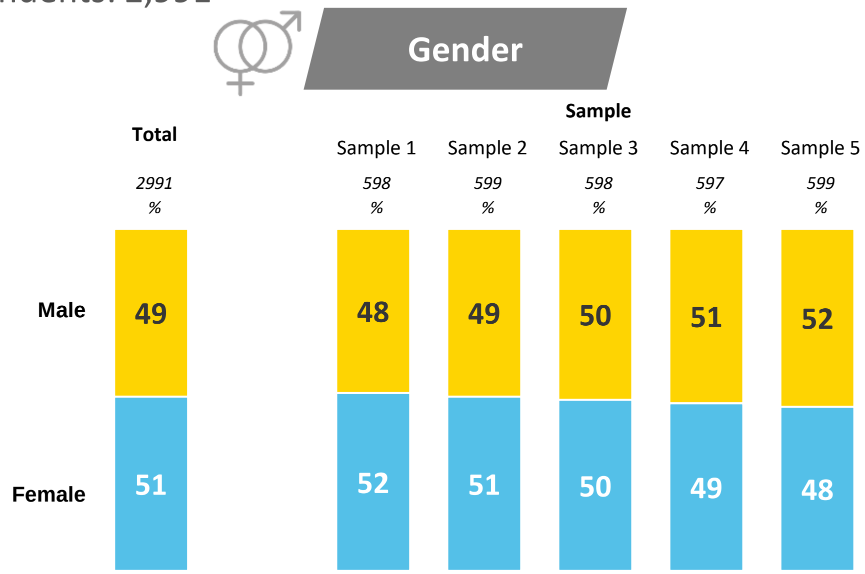
Source: CSO, Census 2016

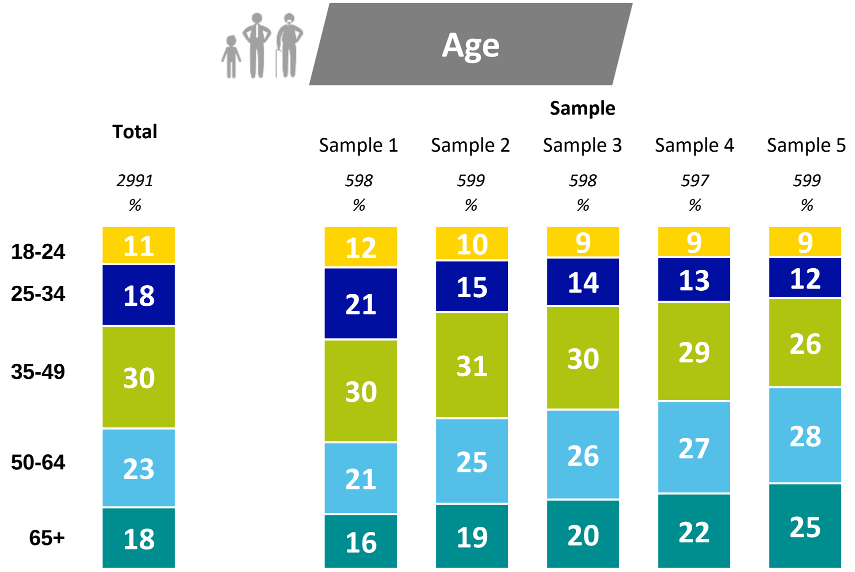
A note on reading the charts

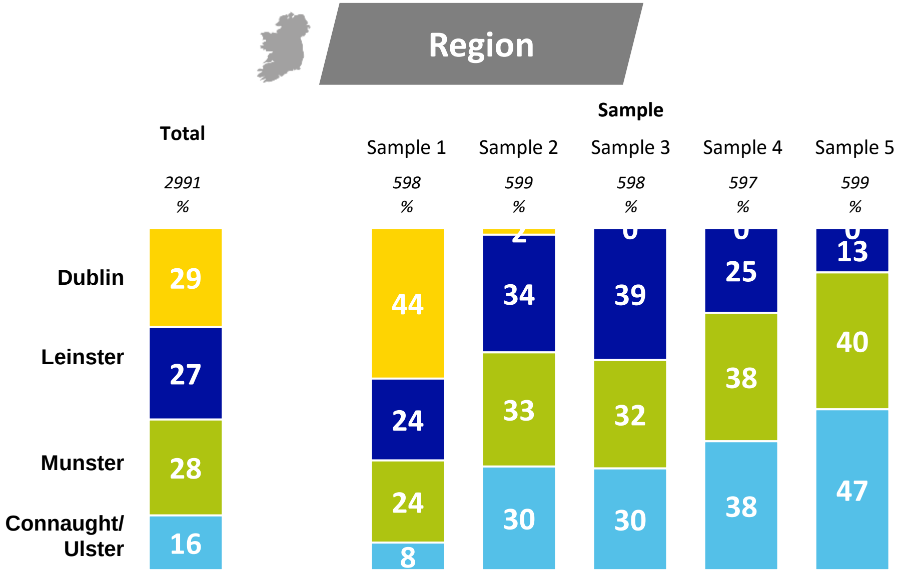
Base Sizes	Base sizes on each chart refer to the unweighted base i.e. the raw number of interviews, as significance testing is based on the raw number of interviews. The charted data refers to the weighted percentages as this is the percentage representative of all adults aged 18+ who fall into that category.
Sample sizes	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.
Questions answered explained	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.
Percentages explained	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%.
Estimated values	With regard to questions which capture estimated values, the estimate is the average amount given by all respondents who answered that question.

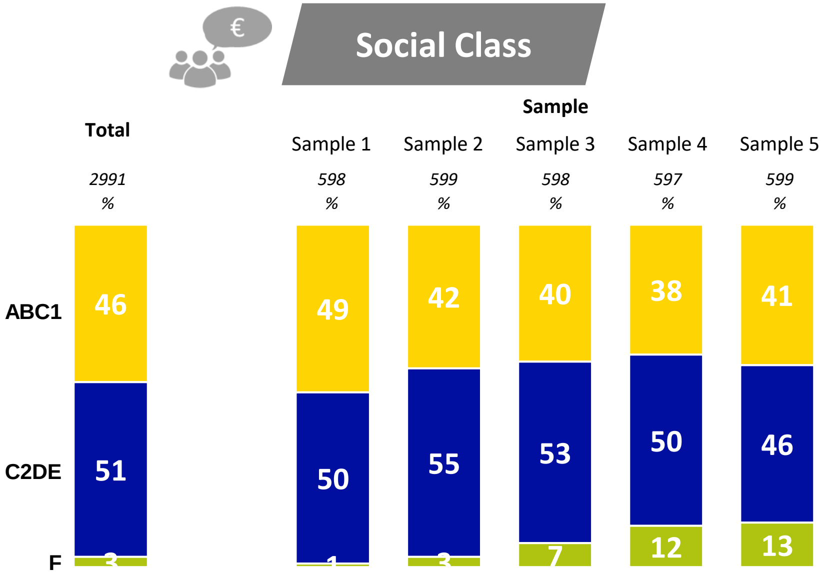
Profile of Respondents

Base: All respondents: 2,991









Analysis of Sample

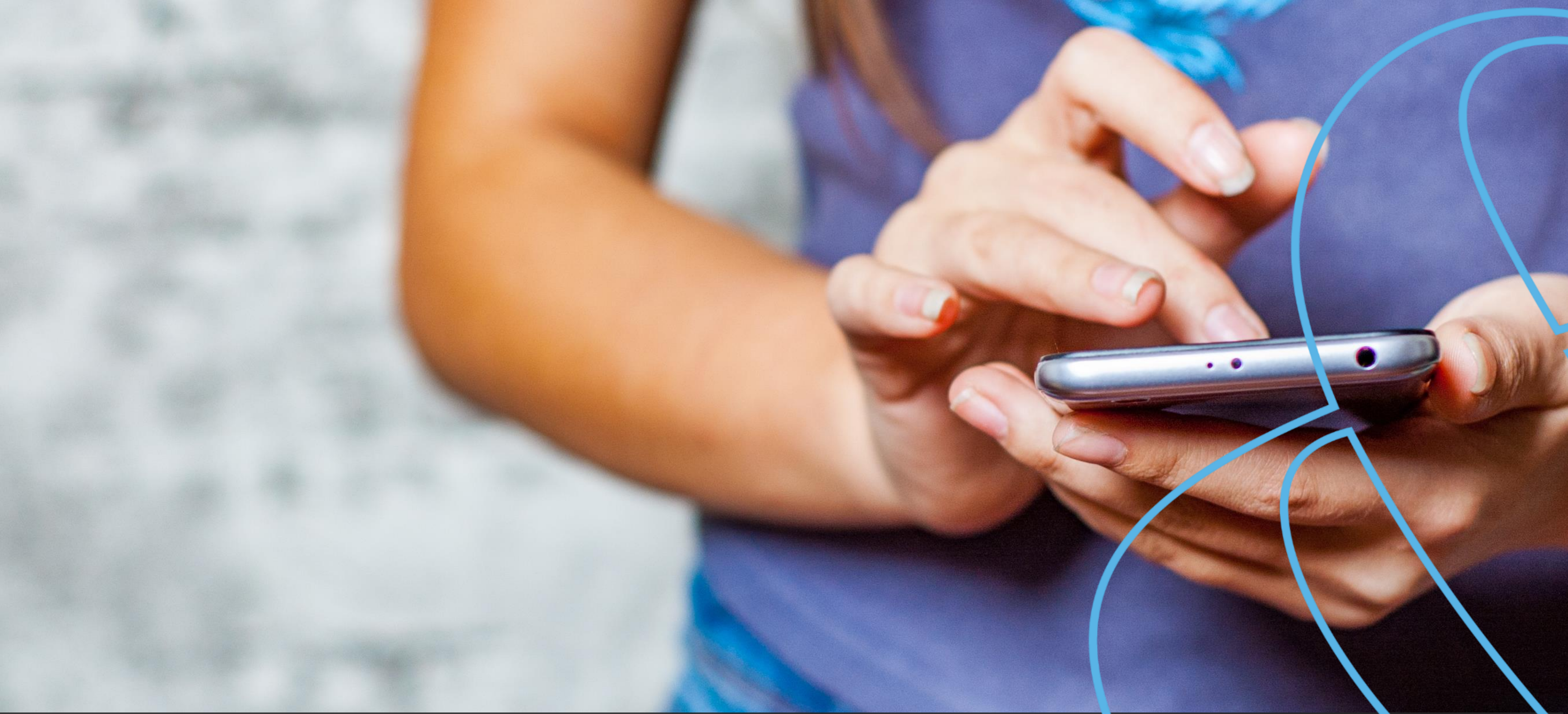
Sample Detail

Interviews achieved and corrective weighting applied.

	No of interviews					Weighting applied				
	Sample 1	Sample 2	Sample 3	Sample 4	Sample 5	Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
Total	598	599	598	597	599	66%	10%	13%	10%	1%
***Gender**	No.	No.	No.	No.	No.	%	%	%	%	%
Male	288	273	279	292	287	48	49	50	51	52
Female	310	326	319	305	312	52	51	50	49	48
***Age**										
18-24	50	50	52	46	40	12	10	9	9	9
25-34	95	92	72	65	75	21	15	14	13	12
35-49	210	173	183	162	148	30	31	30	29	26
50-64	141	152	151	164	161	21	25	26	27	28
65+	102	132	140	160	175	16	19	20	22	25
***Socio-economic status**										
ABC1	296	231	224	210	223	49	42	40	38	41
C2DE	296	349	331	307	290	50	55	53	50	46
F	6	19	43	80	86	1	3	7	12	13

Socio-economic status is based on market research industry agreed figures (AIMRO)

Note the Age profile is older in more rural areas

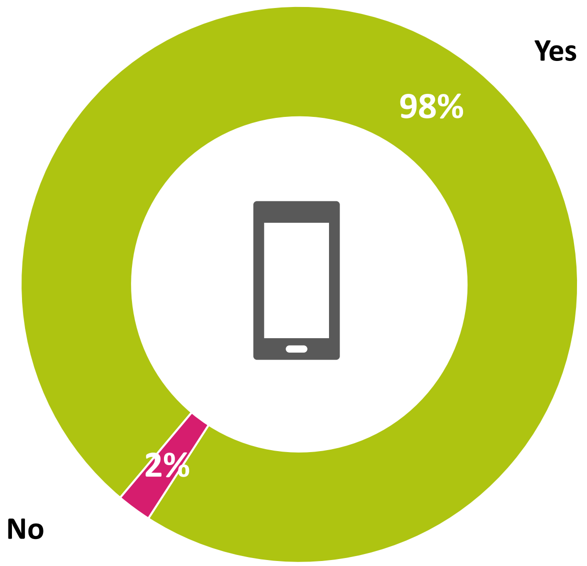


Use and Ownership

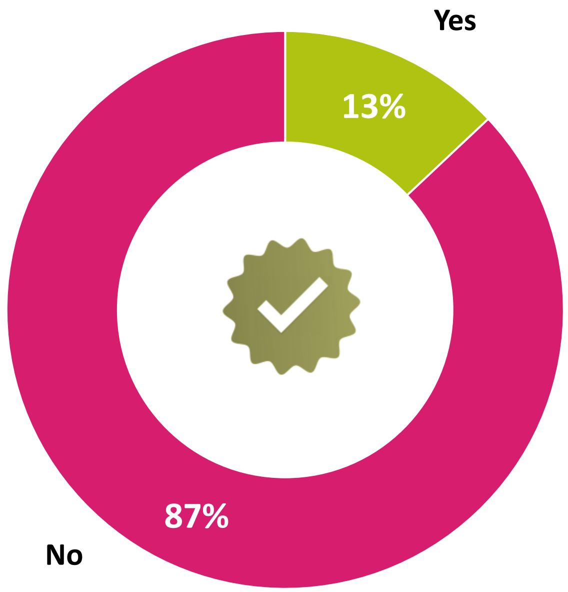
Mobile Phone ownership

Base: All Adults – 2,959

Personally own or use a mobile phone handset



Paid for by your employer



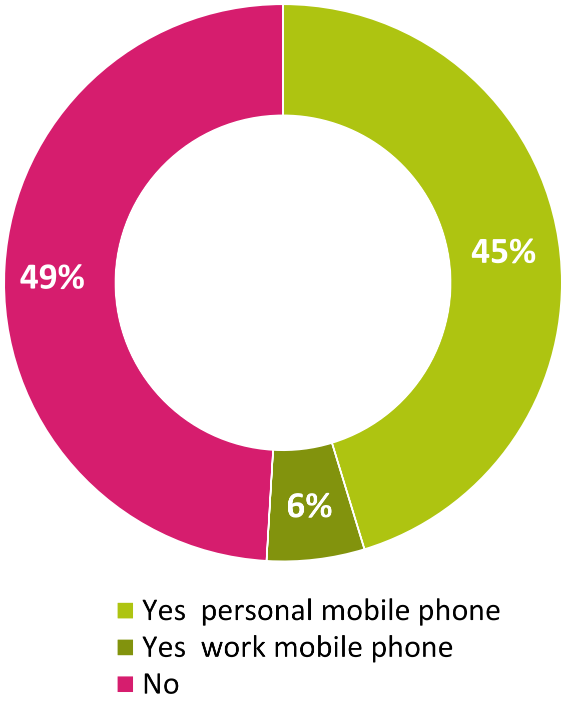
Almost universal ownership of mobile phones (though +65s are slightly less likely to own a phone), with 13% of these having phones paid for by their employer.

Q.1. Do you personally own or use a mobile phone handset (including any mobile phone owned by your employer)?
Q.1b Do you use a mobile phone handset that is paid for by your employer?

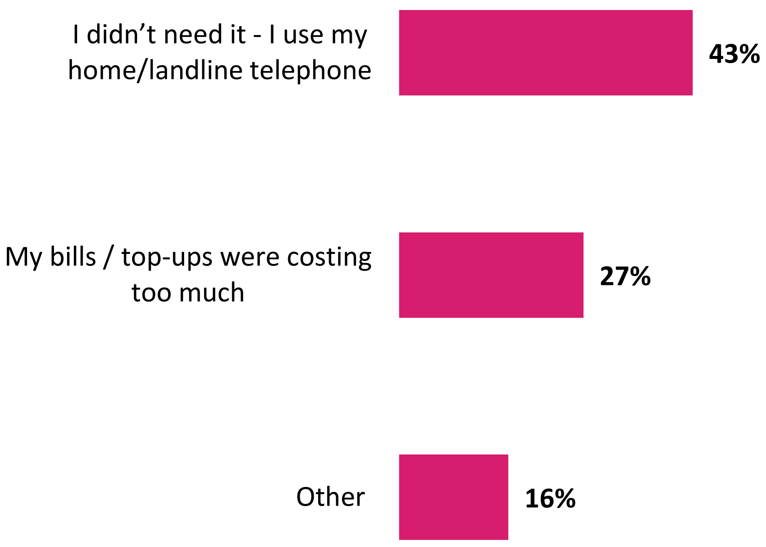
Among those who don't have a mobile phone…

Base: All Adults with no mobile phone – n=32

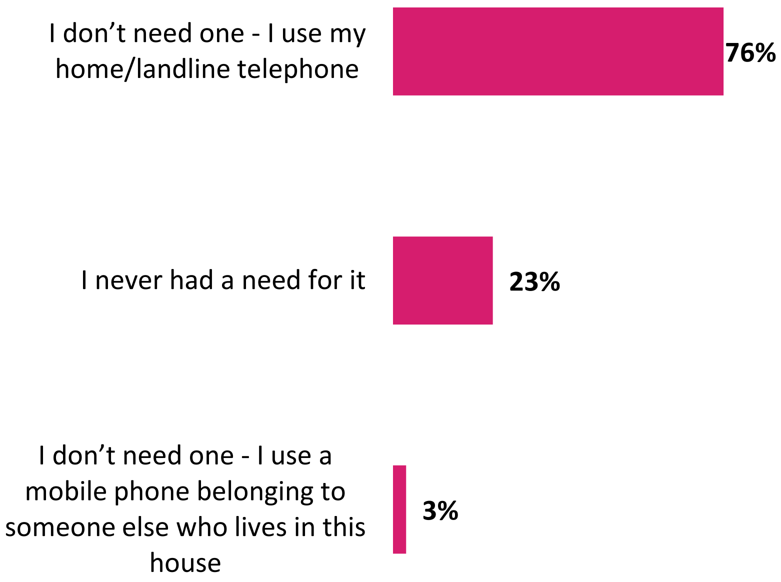
Previous ownership of mobile phone
%



Top 3 reasons for not using mobile phone (Base: Owned a mobile but no mobile currently n=16)



Top 3 reasons for never owing a mobile phone (Base: Never had a mobile n=16)

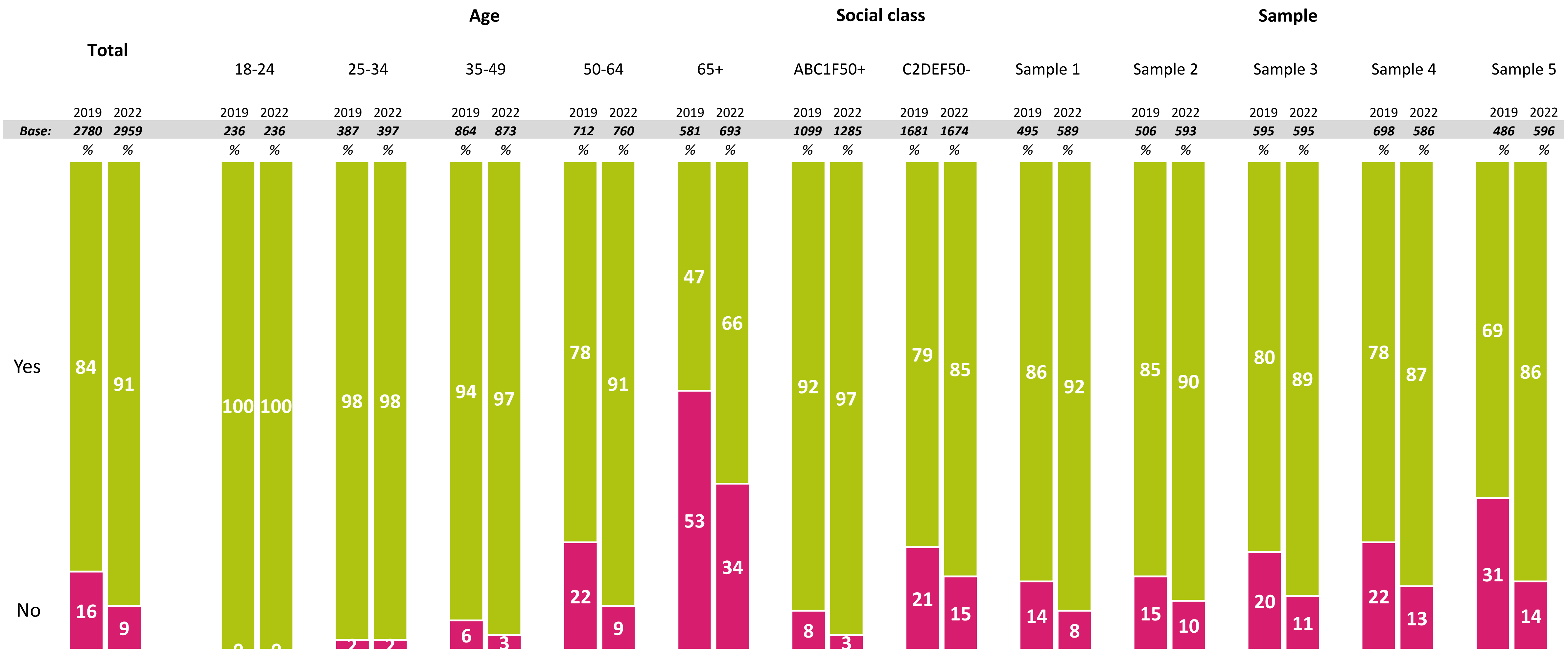


Half of those without a phone have never owned a mobile phone. Mobiles appear to be redundant to many of these individuals. For example, among those who have previously had a phone, 43% noted that they felt they didn't need one and so stopped using phones. Among those who have never owned a phone, 3 in 4 state that they don't need one.

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

Smartphone ownership

Base: All adults with mobile phones n = 2,959



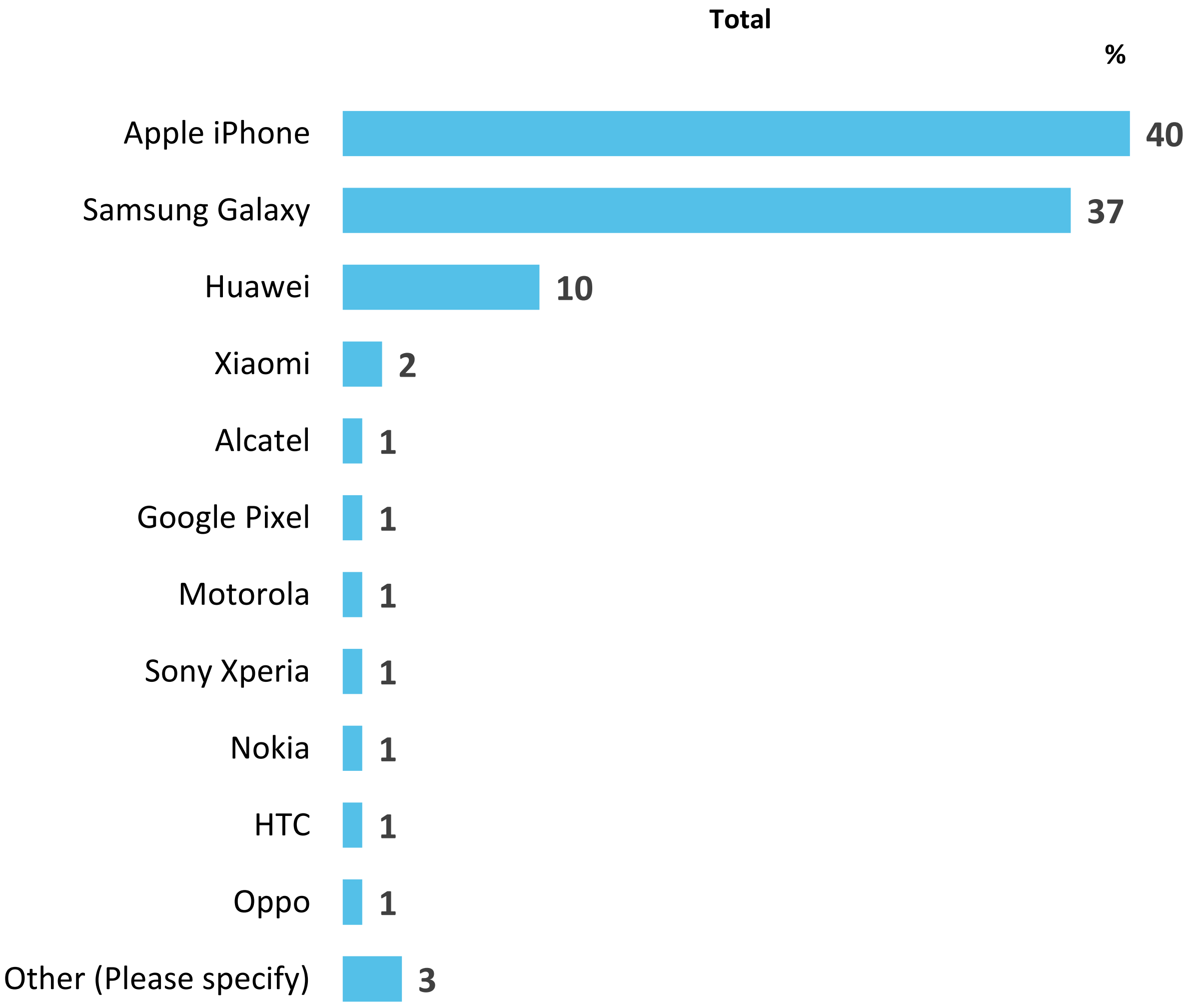
The rate of smartphone ownership has grown to 91%. There have been significant increases in ownership among those over 50, potentially resulting from social distancing measures during the pandemic (increased reliance on tech to communicate). There have also been major shifts in terms of sample areas, with significant increases in more rural samples.

(2019)

Q.13 Is your mobile phone a “smartphone”?

Ownership of current smartphone

Base: own smartphone 2,534

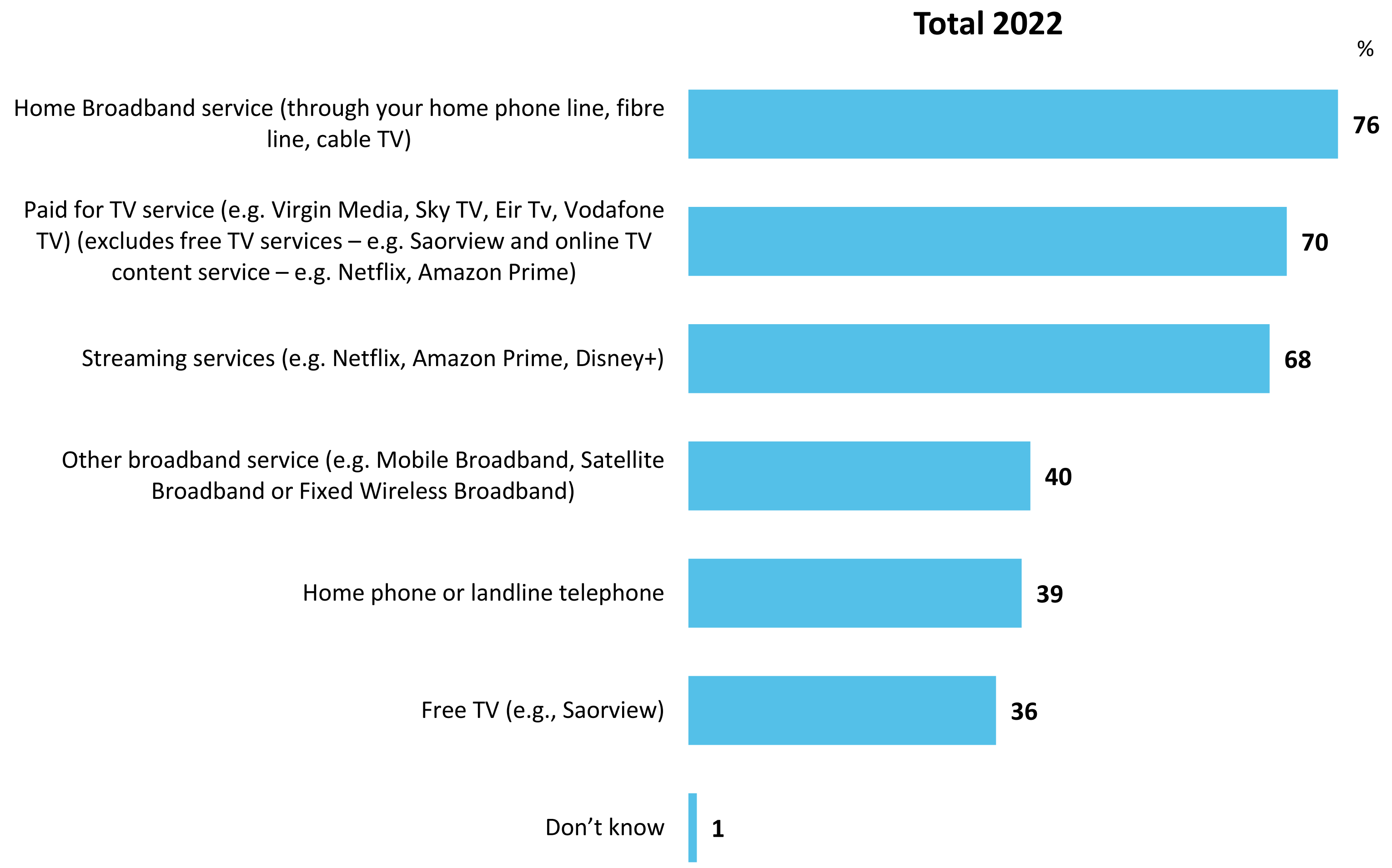


13b (if yes in Q13) What kind of smartphone do you own?

Service Usage x segments

Base: All adults aged 18+: 2991

2019
65%
70%
N/a
40%
52%
N/a
N/a



Sample				
Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
598	*599*	*598*	*597*	*599*
%	*%*	*%*	*%*	*%*
82	**75**	**62**	**55**	**47**
74	**63**	**62**	**60**	**54**
70	**68**	**66**	**63**	**55**
37	**43**	**49**	**46**	**56**
39	**43**	**39**	**39**	**42**
28	**47**	**50**	**55**	**54**
1	**-**	**1**	**1**	**2**

3 in 4 now have home BB (an increase of 10% since 2019), with this usage much higher in more urban areas, and significant drops in more rural areas. Equally, landline usage continues to decline with less than 2 in 5 now having a landline compared with over half in 2019. It is significant that 2 in 3 use streaming services (newly incorporated in the 2022 survey).

Q.5 Do you have any of the following services at home?

Service Usage x demos

Base: All adults aged 18+: 2991

	Total	Age					Social Class			Region				Area	
		18-24	*25-34*	*35-49*	*50-64*	*65+*	*ABC1*	*C2DE*	*F*	*Dublin*	*Leinster*	*Munster*	*Conn/ Ulster*	*Urban*	*Rural*
Base:	***2991***	***238***	***399***	***876***	***769***	***709***	***1184***	***1573***	***234***	***275***	***792***	***993***	***931***	***910***	***2081***
	%	*%*	*%*	*%*	*%*	*%*	*%*	*%*	*%*	*%*	*%*	*%*	*%*	*%*	*%*
Home Broadband service (through your home phone line, fibre line, cable TV)	**76**	80	79	80	75	62	84	69	56	85	74	70	72	82	63
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 Prime)	**70**	76	67	70	71	69	70	71	51	78	68	70	60	75	60
Streaming services (e.g. Netflix, Amazon Prime, Disney+)	**68**	79	85	82	61	29	77	62	42	69	68	69	65	70	64
Other broadband service (e.g. Mobile Broadband, Satellite Broadband or Fixed Wireless Broadband)	**40**	48	42	43	38	33	42	38	46	34	52	38	37	38	44
Home phone or landline telephone	**39**	27	21	30	54	64	39	39	55	38	35	46	38	40	38
Free TV (e.g., Saorview)	**36**	32	29	34	37	45	36	34	58	16	29	44	67	28	50
Don't know	**1**	0	0	0	2	1	0	1	0	1	0	0	1	1	1

It is unsurprising that streaming services and home BB are more prevalent among those under 50, while landlines remain more prevalent among those over 50.

Q.5 Do you have any of the following services at home?

Previous landline ownership x demographics

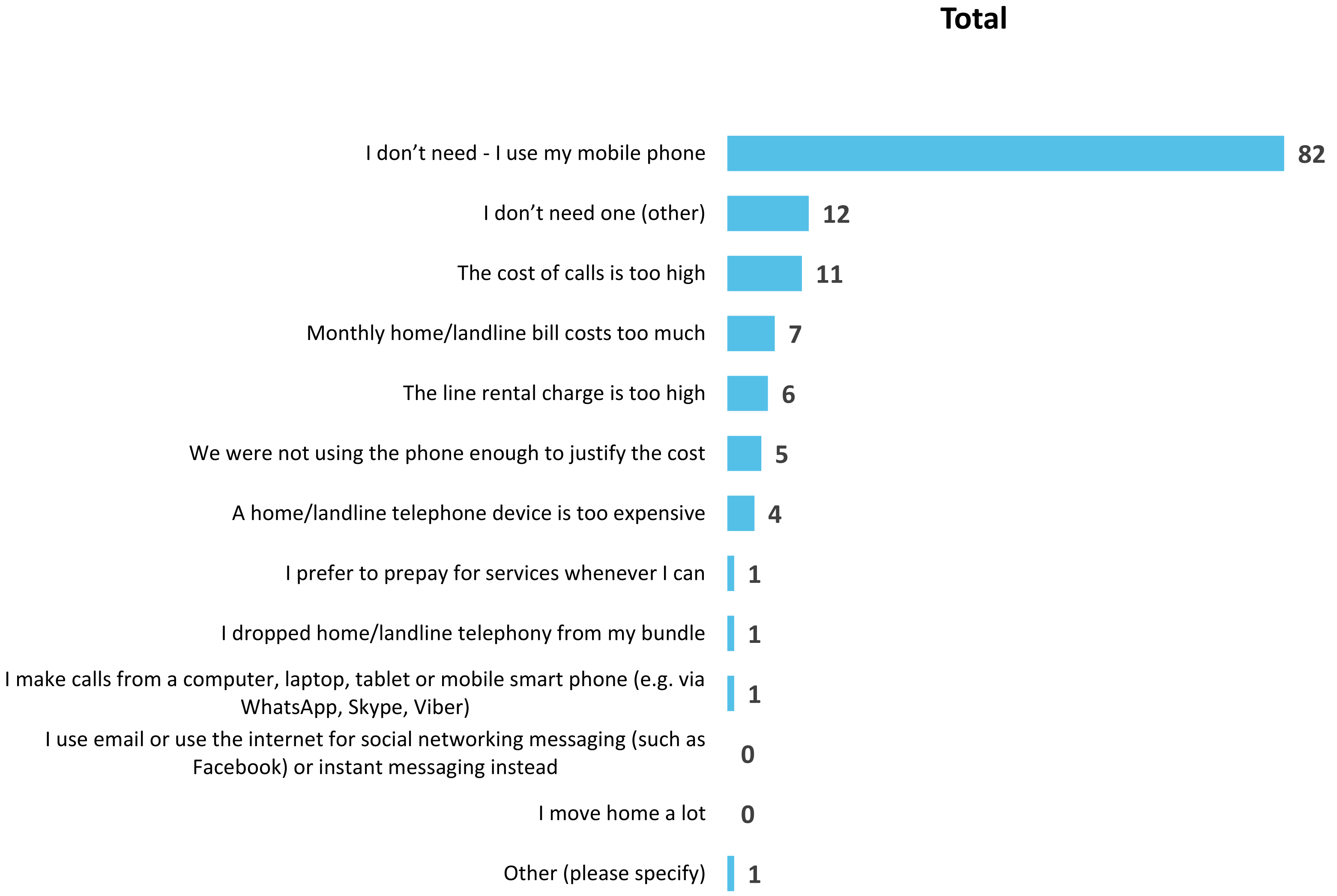
Base: All with no landline: 1766

Of those who do not have a landline, only 2 in 5 had a landline previously. Unsurprisingly, likelihood of having had a landline increases with age.

Q5f In question 5, you stated that you do not have a home/landline telephone. Have you ever had one before?

Reasons for cancelling landline x segments

Base: All adults with Cancelled Landline: 751



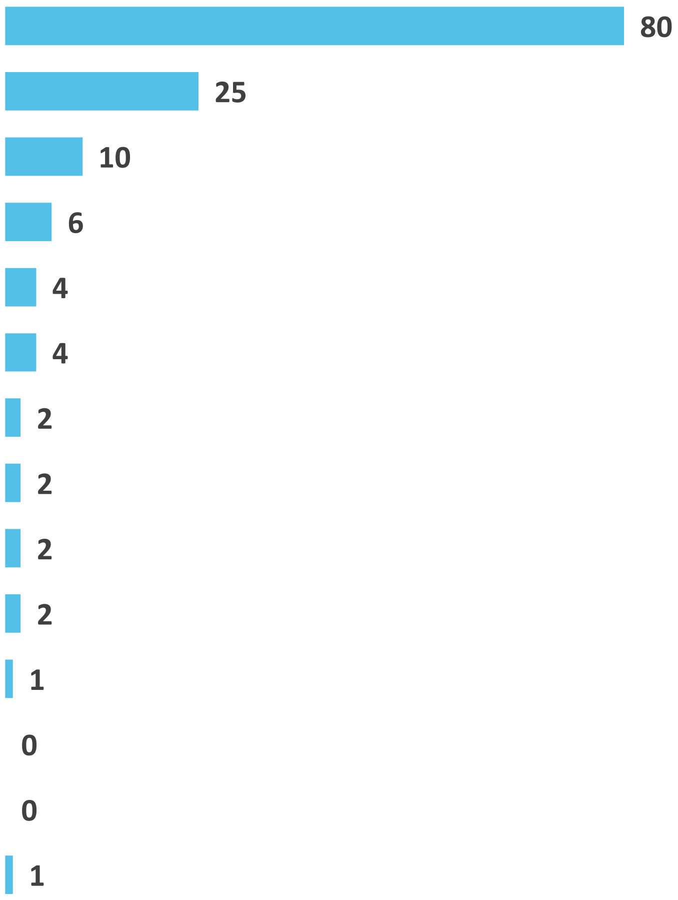
Sample				
Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
139	***144***	***157***	***163***	***148***
%	%	%	%	%
80	76	90	88	78
11	17	9	17	13
12	5	10	15	9
5	9	11	15	17
3	12	9	13	14
6	6	3	4	7
3	5	6	4	5
1	-	1	3	0
2	0	1	1	-
1	1	1	1	1
0	1	1	-	1
0	-	-	1	0
1	0	2	2	5

For the vast majority, landlines became redundant with the proliferation of mobile phones. Now 82% who canceled their landline did so because they have a mobile phone.

Q5g Please tell me why you cancelled your home/landline telephone

Reasons for never having had a landline x segments

Base: All adults Never had a Landline: 1,015



	Total	Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
		219	*205*	*202*	*191*	*198*
	%	%	%	%	%	%
I don't need one - I use my mobile phone	80	80	72	86	89	82
I have never had one	25	26	33	21	20	22
I don't need one (other)	10	9	10	13	11	6
The cost of calls is too high	6	6	4	6	6	3
Monthly home/landline bill costs too much	4	4	3	8	5	5
The line rental charge is too high	4	4	4	5	6	4
I prefer to prepay for services whenever I can	2	1	3	2	4	1
A home/landline telephone device is too expensive	2	2	3	2	4	1
We were not using the phone enough to justify the cost	2	2	3	1	1	1
I make calls from a computer, laptop, tablet or mobile smart phone (e.g. via WhatsApp, Skype, Viber)	2	2	2	2	2	0
I use email or use the internet for social networking messaging (such as Facebook) or instant messaging instead	1	1	1	1	1	2
I dropped home/landline telephony from my bundle	0	-	-	-	2	1
I move home a lot	0	0	1	-	-	1
Other (please specify)	1	1	1	-	0	1

There is evidence that mobile phones are replacing landlines for those who never had a landline, as 4 in 5 of them indicated they use their mobile instead.

Q5h Please tell me why you do not have a home/landline telephone

Reasons for having landline and mobile phone x segments

Base: All adults Have Mobile & Landline: 1,193

2019		Total %	Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
			232	247	237	228	249
			%	%	%	%	%
(28)	I need the home/landline phone for my broadband connection/wifi service	31	31	36	28	31	31
(30)	Making calls with the home/landline phone is cheaper	24	21	21	28	36	33
(16)	I feel secure having a home/landline phone	19	20	13	17	22	25
(11)	I use my home/landline phone for calls to other home/landline numbers and my mobile phone for calls to mobile phones	14	14	13	13	19	9
(18)	My internet package includes free landline	13	14	11	16	12	4
(7)	I need a home/landline phone for my business	9	11	10	10	10	11
(5)	I need the home/landline phone for my house alarm	9	9	7	8	9	8
(6)	I never thought about / or got around to disconnecting the home/landline phone	7	10	7	7	9	9
(6)	The coverage/signal quality of the home/landline phone is better than the mobile phone	7	8	6	7	6	6
(4)	It is too much hassle to disconnect from home/landline phone	4	6	10	7	12	15
(5)	I want to be contactable when I am not at home and that's why I also have a mobile	4	4	1	3	7	4
(12)	Others (please specify)	11	3	7	5	4	6
(3)	Don't know	1	1	2	2	2	1

Among those with both landline and mobile, almost 1 in 3 report they need the landline for their broadband connection, while a quarter state that making calls from a landline is cheaper. This has reduced from 30% in 2019.

Q5i Why do you have both a home phone/landline phone and a mobile phone?

Home broadband service provider x segments

Base: All have broadband: 2,503

	2019	Total	Age					Sample				
			18-24	25-34	35-49	50-64	65+	Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
			222	*370*	*805*	*643*	*463*	*529*	*525*	*498*	*467*	*484*
		%	*%*	*%*	*%*	*%*	*%*	*%*	*%*	*%*	*%*	*%*
Eir (previously Eircom)	*(29)*	29	38	26	26	31	33	25	41	41	36	37
Virgin Media (previously UPC/NTL)	*(19)*	21	18	22	22	23	18	31	0	0	-	0
Vodafone	*(15)*	19	16	22	20	16	18	18	22	20	21	11
Sky	*(14)*	16	14	16	17	15	15	17	15	13	12	6
Three (for Mobile Broadband)	*(6)*	4	5	3	5	4	4	3	3	8	10	15
Imagine	*(1)*	2	0	1	2	2	1	0	4	3	6	4
Digiweb/Smart	*(1)*	1	-	1	1	1	-	0	1	1	1	0
Pure Telecom	*(2)*	1	-	1	2	0	3	1	2	1	1	1
Magnet	*(0)*	0	-	-	0	0	-	0	0	-	-	-
Other (specify)	*(5)*	4	3	3	5	5	4	1	8	11	11	23
Don’t know	*(4)*	2	4	5	1	1	3	2	2	1	3	2

There has been little change in terms of BB providers. Eir is less popular in Sample 1, compared to Virgin Media.

Q.6 Which supplier provides your home broadband service?

Current mobile phone network provider x Samples

Base: Have mobile: 2,959

2019
(33)
(31)
(22)
(10)
(N/A)
(N/A)
(2)
(N/A)
(1)
(0)
(N/A)
(N/A)
(0)

	Total	Age					Sample				
		18-24	*25-34*	*35-49*	*50-64*	*65+*	*1*	*2*	*3*	*4*	*5*
		236	***397***	***873***	***760***	***693***	***589***	***593***	***595***	***586***	***596***
	%	%	%	%	%	%	%	%	%	%	%
Vodafone	**33**	20	25	34	34	45	29	38	38	41	42
Three (including O2)	**31**	42	34	32	28	26	32	27	29	32	33
eir (includes meteor/eMobile)	**22**	22	24	22	23	16	21	24	23	18	18
Tesco Mobile	**10**	10	14	8	10	8	11	8	7	6	4
GoMo	**2**	3	1	2	1	1	2	1	1	1	1
Virgin Mobile	**1**	0	0	1	1	1	1	0	0	0	0
48	**1**	3	0	1	1	0	1	1	0	0	1
Lycamobile	**0**	0	1	-	0	0	0	0	0	-	0
Postfone	**0**	-	0	0	0	1	0	0	0	0	0
Clear Mobile	**0**	0	0	0	0	-	0	0	-	0	-
Other (please specify)	**0**	0	0	0	0	1	0	0	0	0	1
I Don't Know	**0**	0	-	-	0	0	0	0	-	0	0

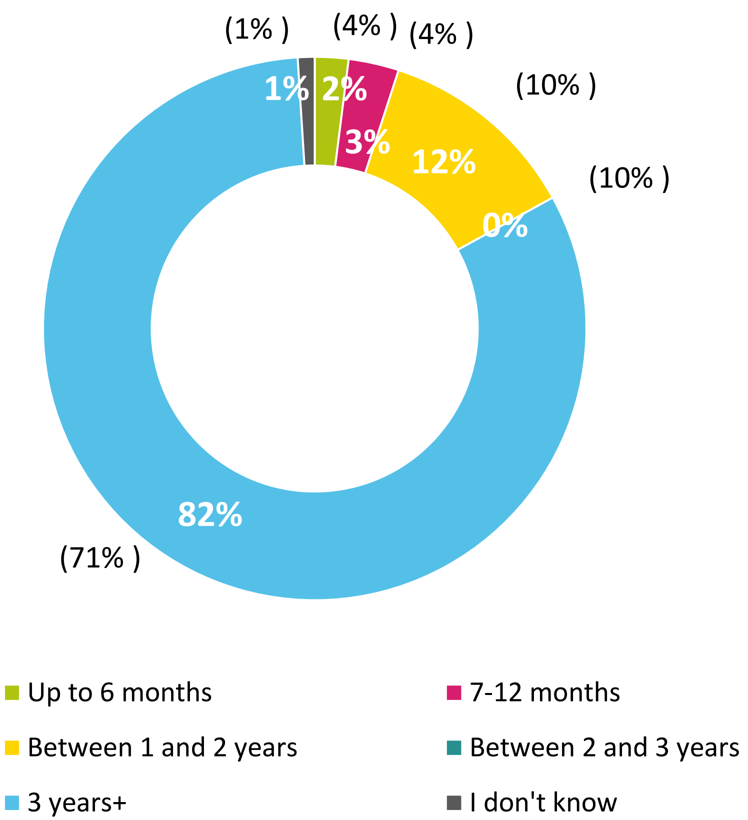
Vodafone and Three continue to hold the majority market share, with Vodafone being strongest in Samples 2, 3, 4 and 5. Three is strongest among those under 25, while close to half of those over 65 are Vodafone customers.

Q.7 Who is your current mobile phone network provider?

Duration with and reasons for choosing current mobile phone network provider

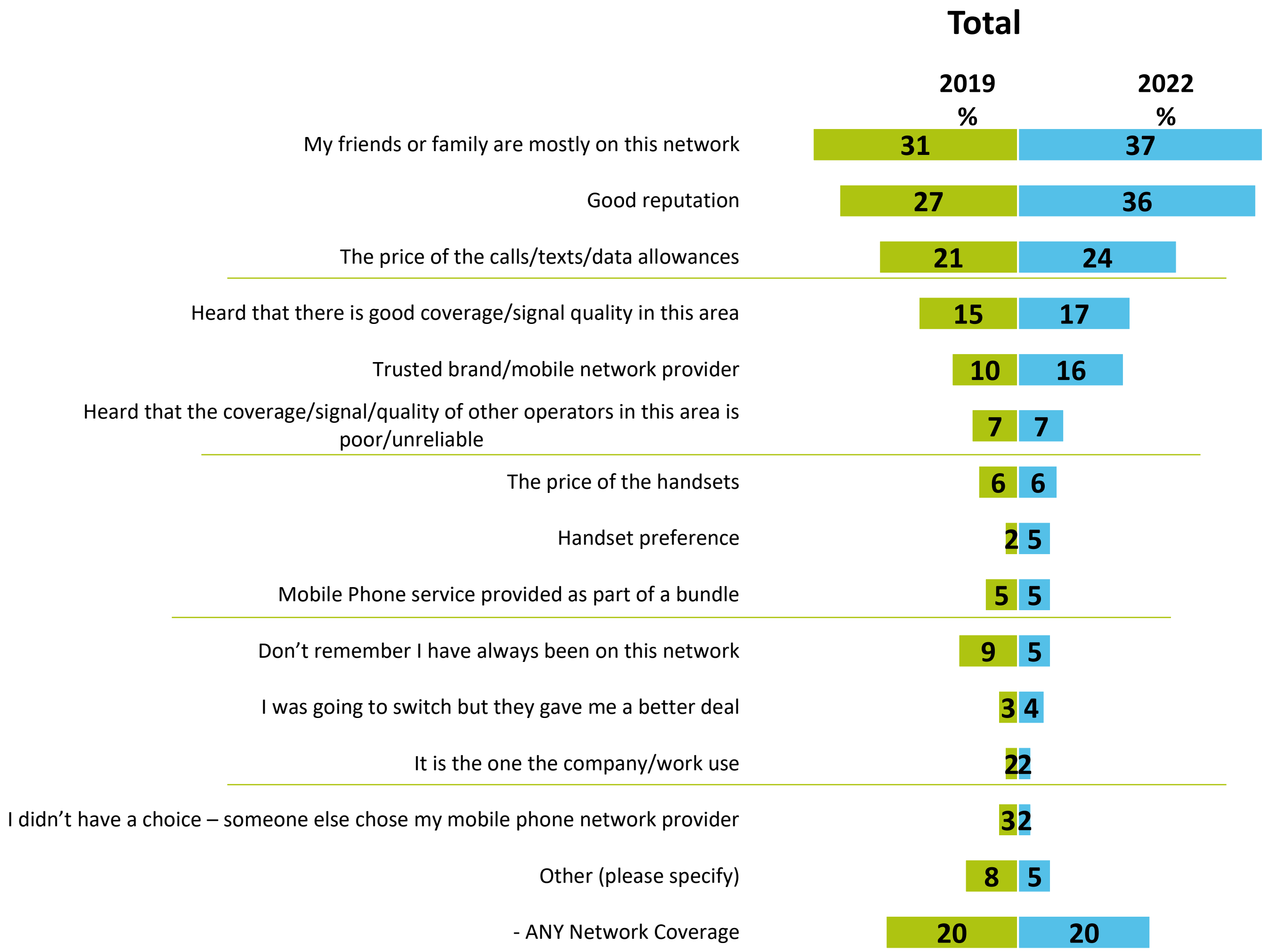
Base: Have mobile: 2959

Length of time with current provider



Any less than 1 year: **5%**

( ) = 2019



Over 4 in 5 note they have been with their current mobile phone provider for more than 3 years. 'Reputation' and 'family and friends being on the same network' are the primary reasons offered for choosing their current provider. Trust of provider is increasing in importance.

Q.7b How long are you with your current mobile phone network provider (Q7)?
Q.7c Why did you choose your current mobile phone network provider?

Reasons for choosing current mobile phone network provider x demos

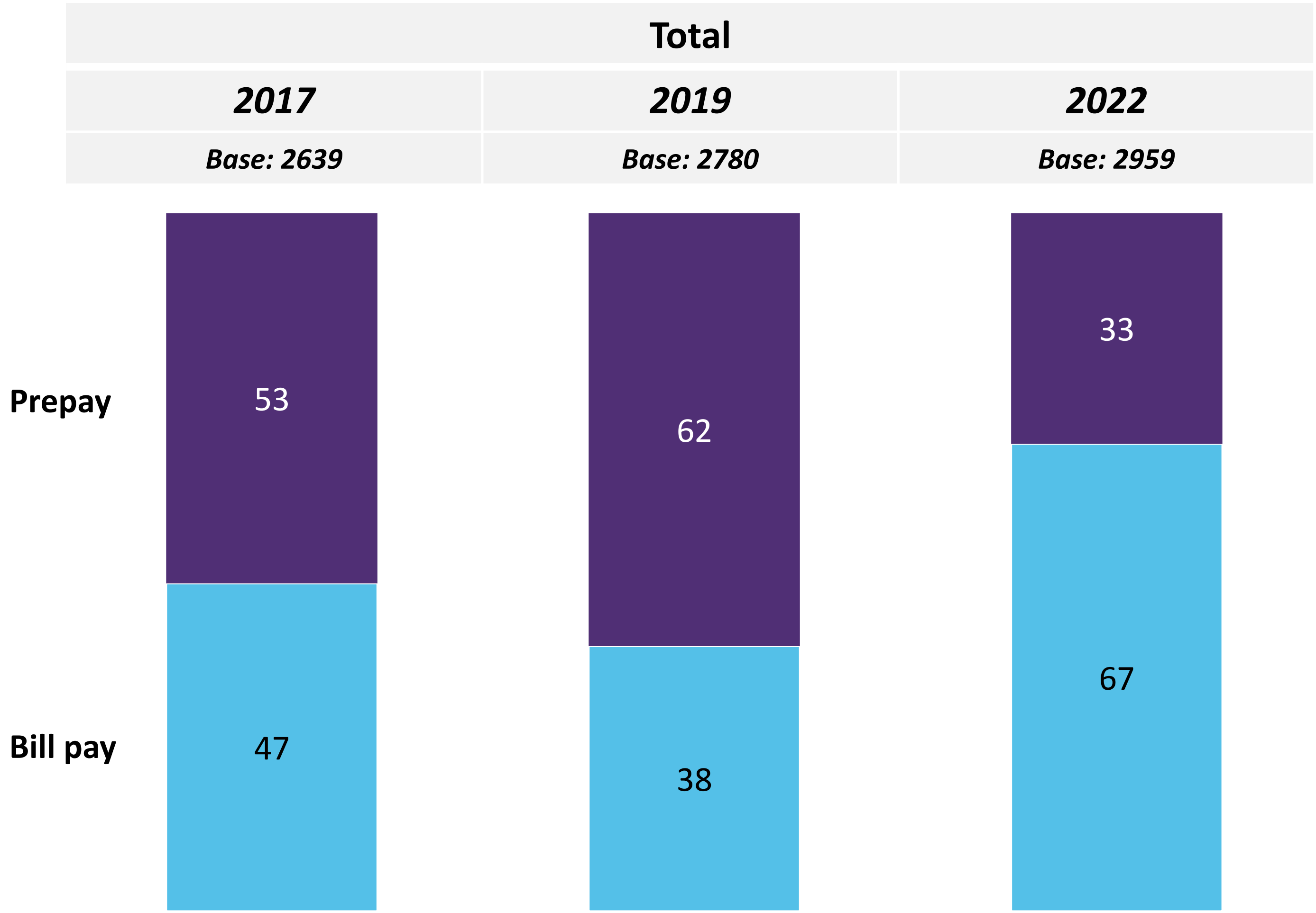
Base: Have mobile: 2,959

	Total	Age					Social Class		Sample				
		18-24	25-34	35-49	50-64	65+	ABC1F50+	C2DEF50-	1	2	3	4	5
Base:	***2959***	***236***	***397***	***873***	***760***	***693***	***1285***	***1674***	***589***	***593***	***595***	***586***	***596***
	%	%	%	%	%	%	%	%	%	%	%	%	%
My friends or family are mostly on this network	37	45	40	32	36	38	34	40	38	31	35	37	34
Good reputation	36	33	36	35	40	36	37	36	38	31	32	40	35
The price of the calls/texts/data allowances	24	30	30	24	20	16	23	24	25	24	23	17	15
Heard that there is good coverage/signal quality in this area	17	21	16	17	14	18	16	18	15	15	20	27	26
Trusted brand/mobile network provider	16	11	16	17	20	13	15	17	17	17	14	13	10
Heard that the coverage/signal/quality of other operators in this area is poor/unreliable	7	7	5	8	7	6	7	7	5	10	11	10	13
The price of the handsets	6	6	7	6	7	4	5	7	6	6	6	8	3
Handset preference	5	6	6	6	3	3	6	4	6	2	3	5	6
Mobile Phone service provided as part of a bundle	5	5	2	5	8	3	4	5	4	8	6	7	6
Don't remember I have always been on this network	5	3	2	6	5	9	5	5	5	5	5	7	8
I was going to switch but they gave me a better deal	4	6	3	4	6	2	3	5	4	3	4	4	3
It is the one the company/work use	2	0	0	2	2	2	2	1	1	2	2	4	3
It merged with my old provider	2	3	2	1	2	3	2	2	2	2	2	3	1
I didn't have a choice – someone else chose my mobile phone network provider	2	4	2	1	3	2	2	3	2	3	5	2	3
Accessibility of information	1	0	1	1	1	1	1	1	1	1	1	2	1
Accessibility of services	1	0	1	1	1	1	1	1	1	1	1	2	1
Other (please specify)	5	4	3	5	4	5	4	5	4	5	6	5	4

Cost is a key consideration for choosing supplier amongst those under 35, but not for those over 65. Poor alternatives are more likely to be cited in Samples 2 to 5.

Plan/package a prepay package

Base: Have mobile: 2959

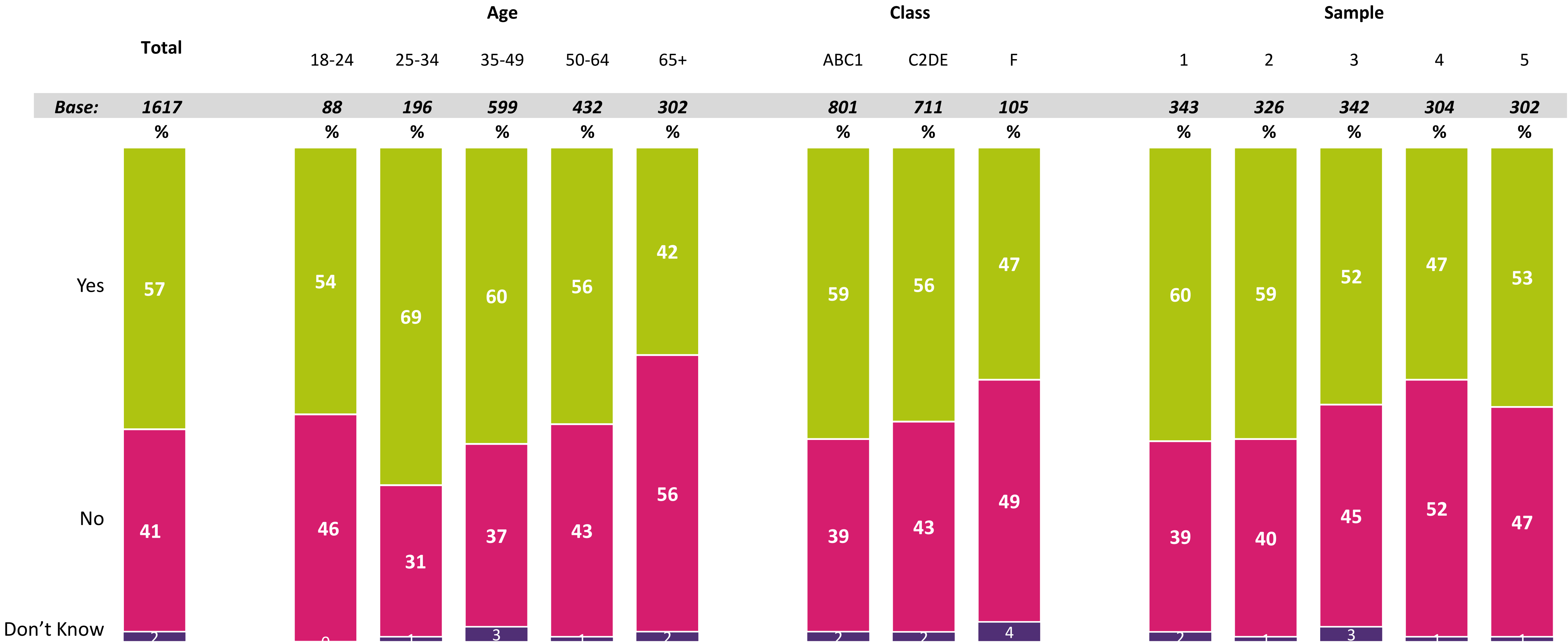


2 in 3 are bill pay customers, with this increasing to 4 in 5 of those aged 35 to 49. Prepay is much more prevalent among those under 25. There has been a marked increase in billpay since 2019. Note, there is likely to be some confusion with growth in direct 'monthly' auto top-ups digitally.

Q.8. Is your mobile plan/package a prepay package (where you buy credit and top up before you can make a call) or bill pay package (where you have a contract with your operator and subsequently receive a bill for the services you used in the previous month)?

Incidence of phones included in payment contracts

Base: All adults on billpay – n=1,617



For nearly 3 in 5 billpay customers, their phone is included in their contract. There is little variation by demographics, although it is more common among those aged 25-34.

8b. Is your mobile phone included in your payment contract? (by this we mean that you are paying for your handset as part of your contract)

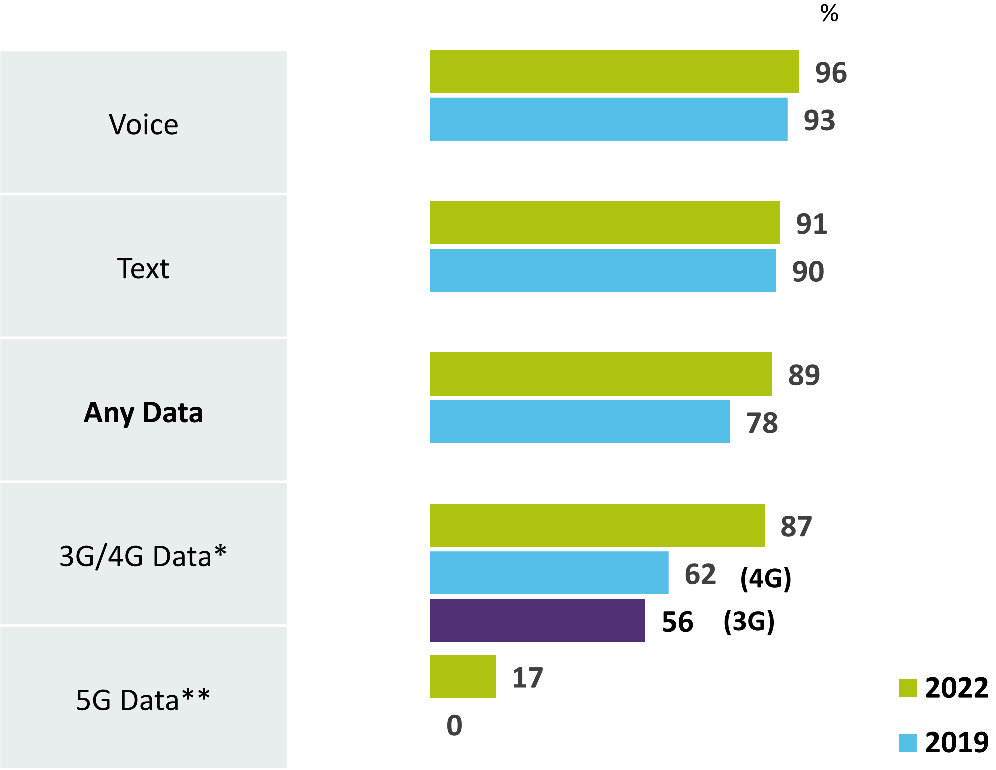
Incidence of using various services on mobile phone x Samples

Base: All have mobile: n=2,959

**Note 3G/4G not combined in 2019*

***Note No 5G in 2019*

Total



	Age					Social Class		Sample				
	18-24	*25-34*	*35-49*	*50-64*	*65+*	*ABC1*	*C2DEF*	*Sample 1*	*Sample 2*	*Sample 3*	*Sample 4*	*Sample 5*
	236	***397***	***873***	***760***	***693***	***1285***	***1674***	***589***	***593***	***595***	***586***	***596***
	%	*%*	*%*	*%*	*%*	*%*	*%*	*%*	*%*	*%*	*%*	*%*
Voice	95	96	97	96	97	98	95	96	97	95	99	98
Text	94	91	94	94	81	93	90	93	87	89	91	89
Any Data	**98**	**98**	**95**	**87**	**64**	**94**	**84**	**91**	**87**	**86**	**83**	**82**
3G/4G Data*	94	96	93	86	64	93	81	89	85	84	82	82
5G Data**	17	28	19	13	8	19	15	21	10	13	9	10

Mobile phone Data usage has become much more common place, with 89% now using any data, compared to 78% in 2019. Those over 65 and those in Samples 4 and 5 (more rural) are much less likely to utilise data.

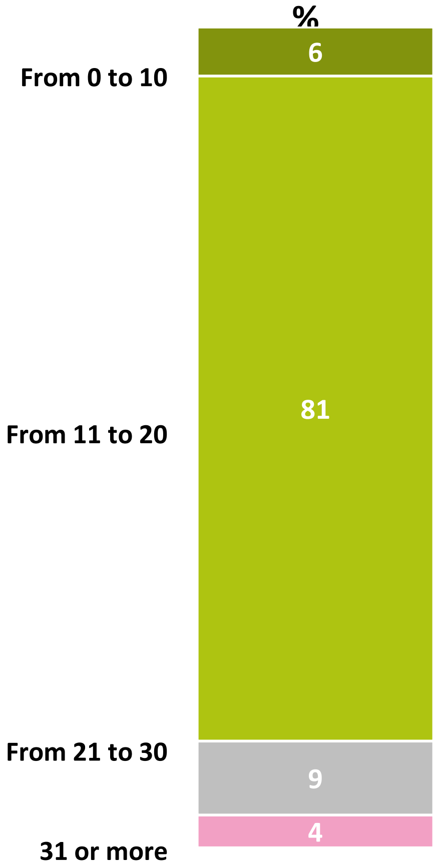
2019: Q.10 On your mobile phone which of the following do you use and pay for?
2022: Q.10 On your mobile phone which of the following do you use?

Typical spend on prepay / bill pay services

Base: All have mobile: 2,780

Prepay Costs – Euro per typical month)

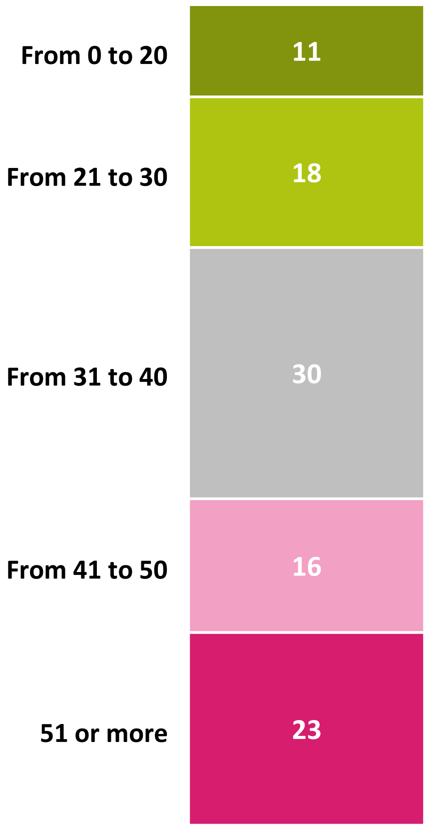
(Base: Prepay users: n=954)



Mean:	€20.43

Bill Pay Costs - Euro per typical month)

(Base: Billpay users: n=1,961)



Mean:	€37.95

The profile of expenditure amongst Prepay customers is notably different by price point, reflecting different usage patterns among age cohorts especially those >65.

Q.10b In a typical month, how much do you spend on mobile phone top ups (ie buying credit with (INSERT MAIN OPERATOR)?

Q.12 In a typical month, what is your monthly mobile phone bill from (insert main operator)? Exclude any roaming changes or if you are bundled in with home/landline or broadband.

Typical spend on prepay mobile phone top ups x demos

Base: All have pre pay: 1,335

	Total	Age					Social Class			Sample				
		18-24	25-34	35-49	50-64	65+	ABC1	C2DE	F	Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
	1335	148	199	273	326	389	374	833	128	245	263	253	282	292
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
From 0 to 10	6	9	4	7	4	6	8	4	12	5	6	5	9	7
From 11 to 20	81	75	83	81	79	86	74	85	70	82	82	78	75	78
From 21 to 30	9	13	10	9	9	6	14	6	17	8	8	11	13	13
31 or more	4	4	3	4	8	2	4	4	1	4	4	6	2	2
Don't Know	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Mean	20.43	19.80	19.50	19.56	21.41	21.79	19.91	20.70	20.41	19.84	20.09	24.35	20.06	20.02

Those in more rural areas are more likely to spend more on top ups.

Q.10b In a typical month, how much do you spend on mobile phone top ups (ie buying credit with (INSERT MAIN OPERATOR)?

Typical spend on bill pay services x demos

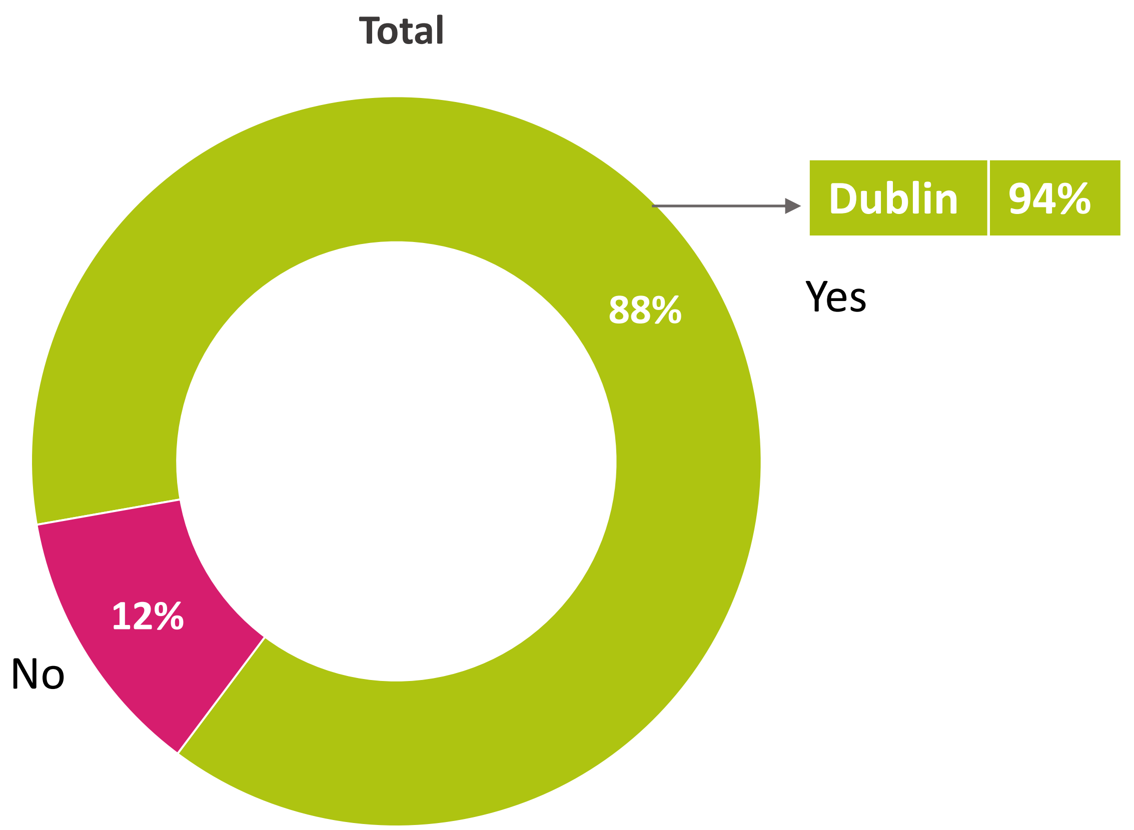
Base: All on billpay : 1,617

	Total	Age					Social Class		Sample				
		18-24	25-34	35-49	50-64	65+	ABC1F50+	C2DEF50-	Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
UNWTD	***1617***	***88***	***196***	***599***	***432***	***302***	***844***	***773***	***343***	***326***	***342***	***304***	***302***
	%	%	%	%	%	%	%	%	%	%	%	%	%
From 0 to 20	21	20	12	18	30	26	19	24	23	18	20	15	19
From 21 to 30	24	38	23	21	25	22	23	24	23	24	24	29	22
From 31 to 40	23	12	26	24	20	32	25	22	23	25	24	24	27
From 41 to 50	13	14	19	15	11	8	14	12	13	18	13	14	14
51 or more	18	17	21	23	14	13	18	18	19	15	19	18	19
Don't Know	-	-	-	-	-	-	-	-	-	-	-	-	-
Mean	**37.95**	**36.00**	**41.50**	**39.02**	**35.50**	**36.14**	**38.35**	**37.46**	**37.66**	**38.13**	**37.91**	**39.60**	**39.58**

Q.12 In a typical month, what is your monthly mobile phone bill from ______ (insert main operator)? Exclude any roaming changes or if you are bundled in with home/landline or broadband.

Incidence of pre-pay packages each month

Base: Have prepay: 1,335



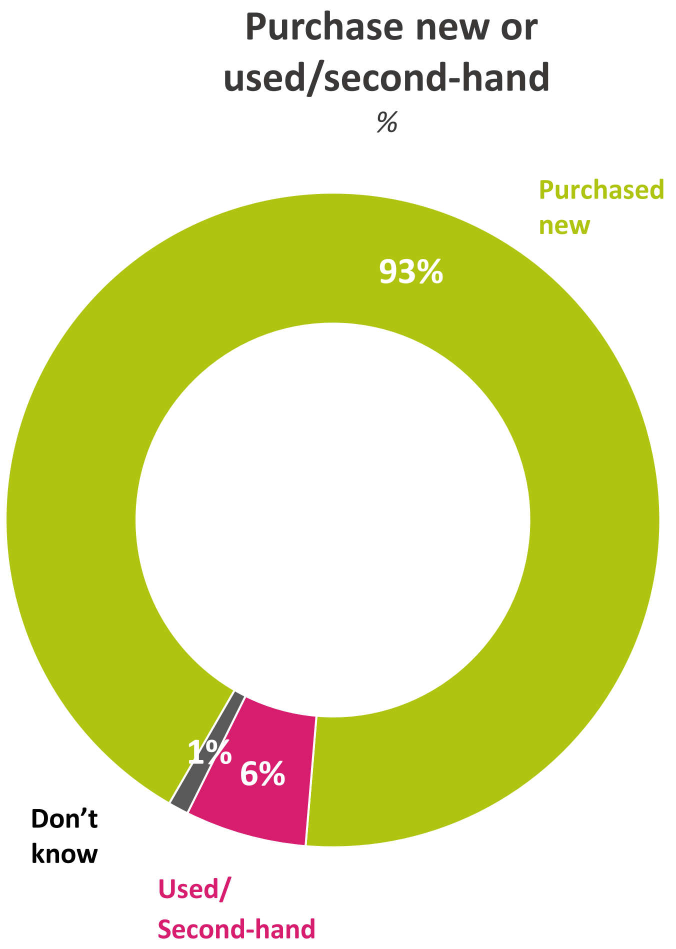
"This means that when you top-up a certain amount you receive a set number of minutes, texts and data allowance etc"

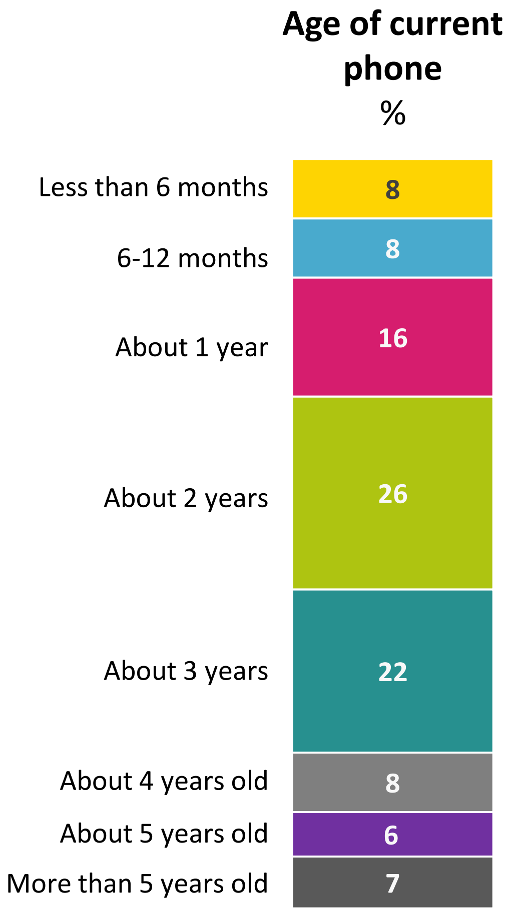
The vast majority opt for a pre-pay package each month, with 94% of those in Dublin opting for this.

Q.11. Do you usually opt for a pre-pay plan each month? This means that when you top-up a certain amount you receive a set number of minutes, texts and data allowance etc

Level of second hand purchases & age of phone since purchase

Base: Have mobile: 2,959





NET (1-2 Years)	42%
NET (3-5 Years)	36%

Vast majority buy phones new, with only 6% buying second hand. Almost 3 in 5 indicate that their phone is 2 years old or less, with 1 in 5 indicating that their phone is 4+ years old.

14. Did you purchase your current mobile phone new or used/second-hand?
14a How old is your current mobile phone from when it was new?

Service Usage

Minute Usage of your mobile phone in a typical day

Base: All have mobile: 2,959 / All with smartphone: 2,534

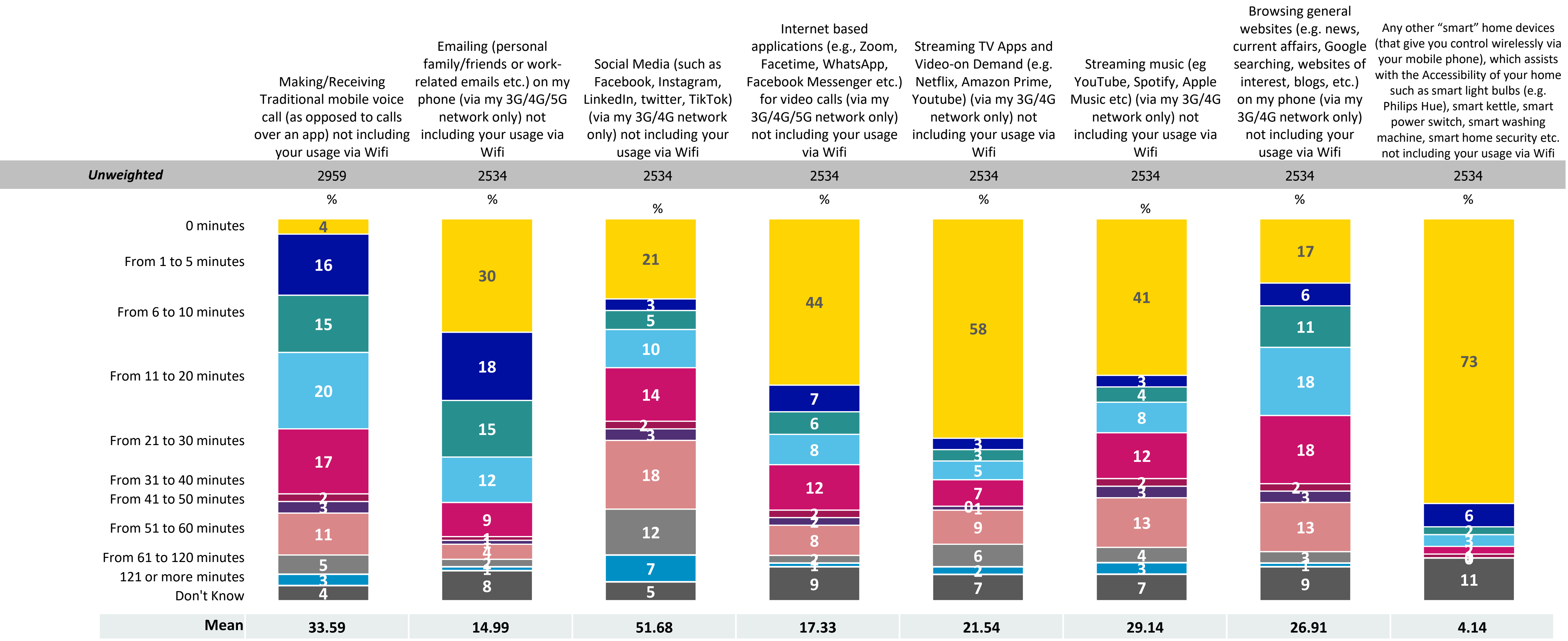
Usage	n - unweighted	Mean 2017	Mean 2019	Mean 2022
Making/Receiving Traditional mobile voice call (as opposed to calls over an app) not including your usage via Wifi	2959	31.21	30.23	33.59
Emailing (personal family/friends or work-related emails etc.) on my phone (via my 3G/4G/5G network only) not including your usage via Wifi	2534	8.16	11.29	14.99
Social Media (such as Facebook, Instagram, LinkedIn, twitter, TikTok) (via my 3G/4G network only) not including your usage via Wifi	2534	33.33	46.00	51.68
Internet based applications (e.g., Zoom, Facetime, WhatsApp, Facebook Messenger etc.) for video calls (via my 3G/4G/5G network only) not including your usage via Wifi	2534	8.19	8.10	17.33
Streaming TV Apps and Video-on Demand (e.g. Netflix, Amazon Prime, Youtube) (via my 3G/4G network only) not including your usage via Wifi	2534	9.51	20.39	21.54
Streaming music (eg YouTube, Spotify, Apple Music etc) (via my 3G/4G network only) not including your usage via Wifi	2534	9.39	21.62	29.14
Browsing general websites (e.g. news, current affairs, Google searching, websites of interest, blogs, etc.) on my phone (via my 3G/4G network only) not including your usage via Wifi	2534	n/a	24.18	26.91
Any other "smart" home devices (that give you control wirelessly via your mobile phone), which assists with the Accessibility of your home such as smart light bulbs, smart kettle, smart power switch, smart washing machine, smart home security etc. not including your usage via Wifi	2534	n/a	n/a	4.14

Average Usage has increased across the board, particularly in streaming music and internet based applications for video calls (more than doubling since 2019).

Q.17 Number of Minutes per day for

Minute Usage of your mobile phone in a typical day

Base: All have mobile: 2,959 / All with smartphone: 2,534



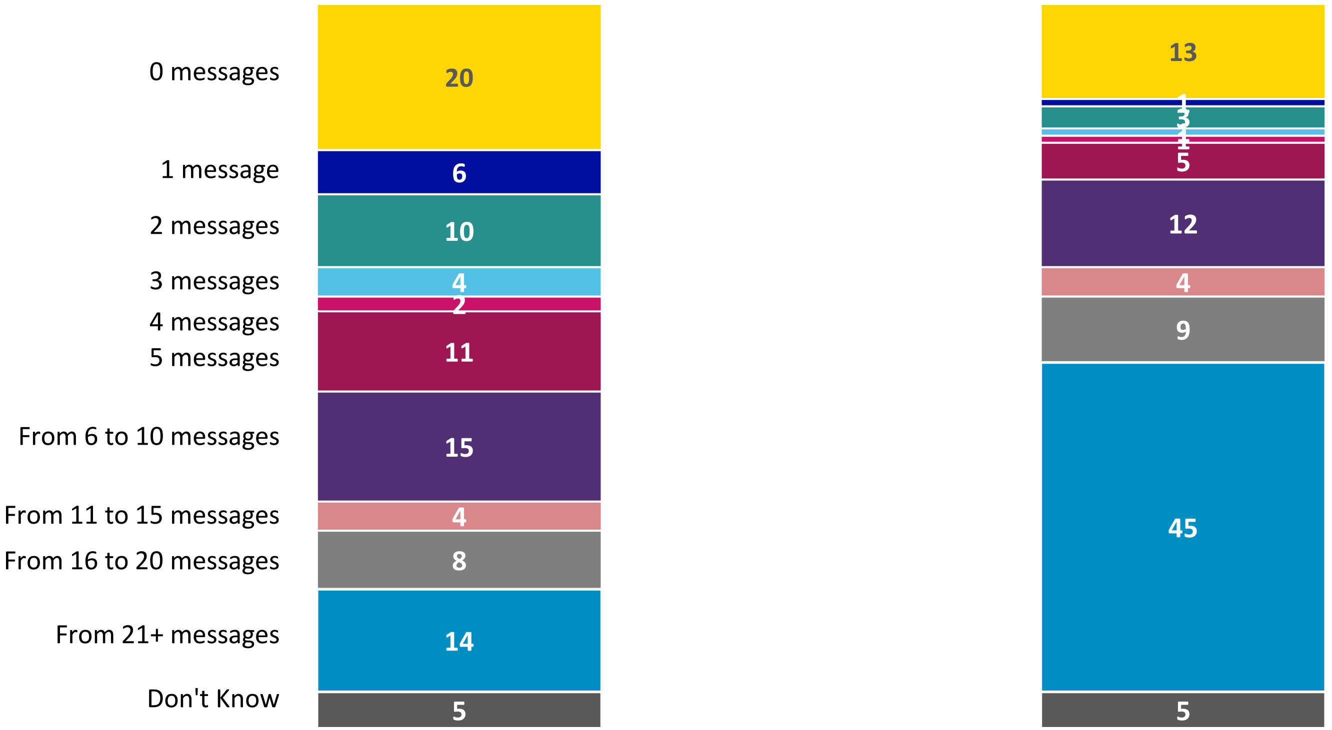
Making/Receiving traditional calls, browsing websites and use of Social media are the Top 3 identified in terms of time spent.

Q.17 Number of Minutes per day for

Level of messages sent from your mobile phone in a typical day

Base: All have mobile: 2,959 / All with smartphone: 2,534

	Sending/Receiving traditional SMS text messaging as opposed to using an app or iMessage blue messages not including your usage via Wifi		Internet based applications (e.g., WhatsApp, Snapchat, Facebook Messenger, Viber etc.) for instant messaging (via my 3G/4G/5G network only) not including your usage via Wifi
Unweighted	***2959***		***2534***
	%		***%***



2022 Mean	***12.39***	***32.32***
2019 Mean	***11.55***	***28.75***
2017 Mean	***14.64***	***19.27***

Sending/Receiving traditional SMS text messaging has decreased, on average, since 2017 but there is a clear upward trend in the frequency of messages sent via Internet based applications in that same time period.

Q.17a Number of messages per day for

Usage of your mobile phone in a typical day x minutes

Base: All have mobile: 2,959 / All with smartphone: 2,534

	Total	Age					Sample				
		18-24	25-34	35-49	50-64	65+	1	2	3	4	5
UNWTD	2959	236	397	873	760	693	589	593	595	586	596
Making/Receiving Traditional mobile voice call (as opposed to calls over an app) not including your usage via Wifi	33.66	46.02	33.60	36.82	29.52	25.59	35.16	32.22	29.23	30.79	32.53
Emailing (personal family/friends or work-related emails etc.) on my phone (via my 3G/4G/5G network only) not including your usage via Wifi	14.99	11.26	16.98	20.54	12.20	6.26	16.94	11.73	12.24	9.85	10.05
Social Media (such as Facebook, Instagram, LinkedIn, twitter, TikTok) (via my 3G/4G network only) not including your usage via Wifi	51.68	99.95	73.70	48.73	29.84	15.65	55.99	44.03	46.90	38.28	35.62
Internet based applications (e.g., WhatsApp, Facebook Messenger, Snap Chat etc.) for voice calls (via my 3G/4G/5G network only) not including your usage via Wifi	27.94	32.90	40.67	30.66	20.47	9.63	31.92	23.06	20.04	17.96	18.19
Internet based applications (e.g., Zoom, Facetime, WhatsApp, Facebook Messenger etc.) for video calls (via my 3G/4G/5G network only) not including your usage via Wifi	18.73	21.40	19.92	20.94	14.17	6.12	20.22	13.36	11.52	11.36	9.94

Sample 1 consistently shows higher usage, while those over 65 continue to show lower usage levels. Those under 35 are the most frequent users.

Q.17 Number of Minutes per day for

Usage of your mobile phone in a typical day x minutes

Base: All have mobile: 2,959 / All with smartphone: 2,534

	Total	Age					Sample				
		18-24	25-34	35-49	50-64	65+	1	2	3	4	5
UNWTD	***2959***	***236***	***397***	***873***	***760***	***693***	***589***	***593***	***595***	***586***	***596***
Streaming TV Apps and Video-on Demand (e.g. Netflix, Amazon Prime, Youtube) (via my 3G/4G network only) not including your usage via Wifi	21.54	42.57	27.83	23.22	13.76	2.21	24.25	16.17	18.06	14.33	13.25
Streaming music (eg YouTube, Spotify, Apple Music etc) (via my 3G/4G network only) not including your usage via Wifi	29.14	48.71	45.27	29.59	17.64	5.21	32.48	24.23	25.27	18.79	16.01
Browsing general websites (e.g. news, current affairs, Google searching, websites of interest, blogs, etc.) on my phone (via my 3G/4G network only) not including your usage via Wifi	26.91	32.61	33.19	27.60	22.77	17.47	28.48	26.01	24.85	21.24	20.34
Any other "smart" home devices (that give you control wirelessly via your mobile phone), which assists with the Accessibility of your home such as smart light bulbs (e.g. Philips Hue), smart kettle, smart power switch, smart washing machine, smart home security etc. not including your usage via Wifi	4.21	4.68	6.35	4.29	3.70	0.72	4.73	2.96	1.26	5.91	2.73

Sample 1 and the 18-24 age cohort exhibit higher usage for Streaming related activity, while those over 65 show lower usage for this activity.

Q.17 Number of Minutes per day for

Usage of your mobile phone in a typical day x messages

Base: All have mobile: 2,959 / All with smartphone: 2,534

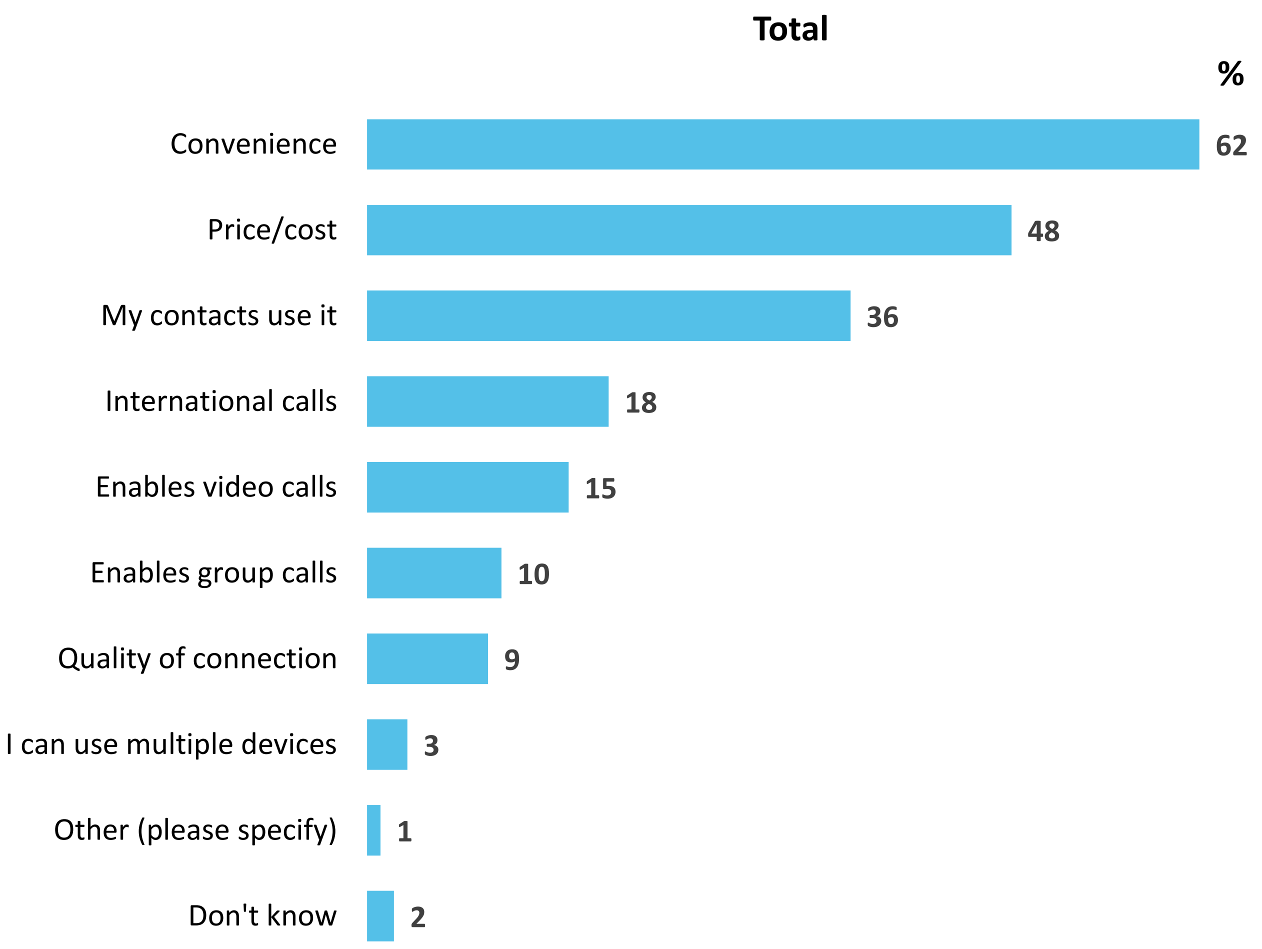
	Total	Age					Sample				
		18-24	25-34	35-49	50-64	65+	1	2	3	4	5
UNWTD	2959	236	397	873	760	693	589	593	595	586	596
Sending/Receiving traditional SMS text messaging as opposed to using an app or iMessage blue messages not including your usage via Wifi	12.39	20.49	15.19	12.94	9.47	6.83	13.16	11.74	10.66	10.71	10.10
Internet based applications (e.g., WhatsApp, Snapchat, Facebook Messenger, Viber etc.) for instant messaging (via my 3G/4G/5G network only) not including your usage via Wifi	32.38	55.15	44.44	32.92	20.65	11.33	35.50	28.17	25.27	25.47	28.26

Similar to the number of minutes, the 18-24 age cohort show higher average numbers of traditional SMS messages sent while 18-34 and Sample 1 are most active messaging via internet-based applications.

Q.17a Number of Messages per day for…

Reasons for using internet based application to make voice/video calls

Base: all using internet to make calls 1,683



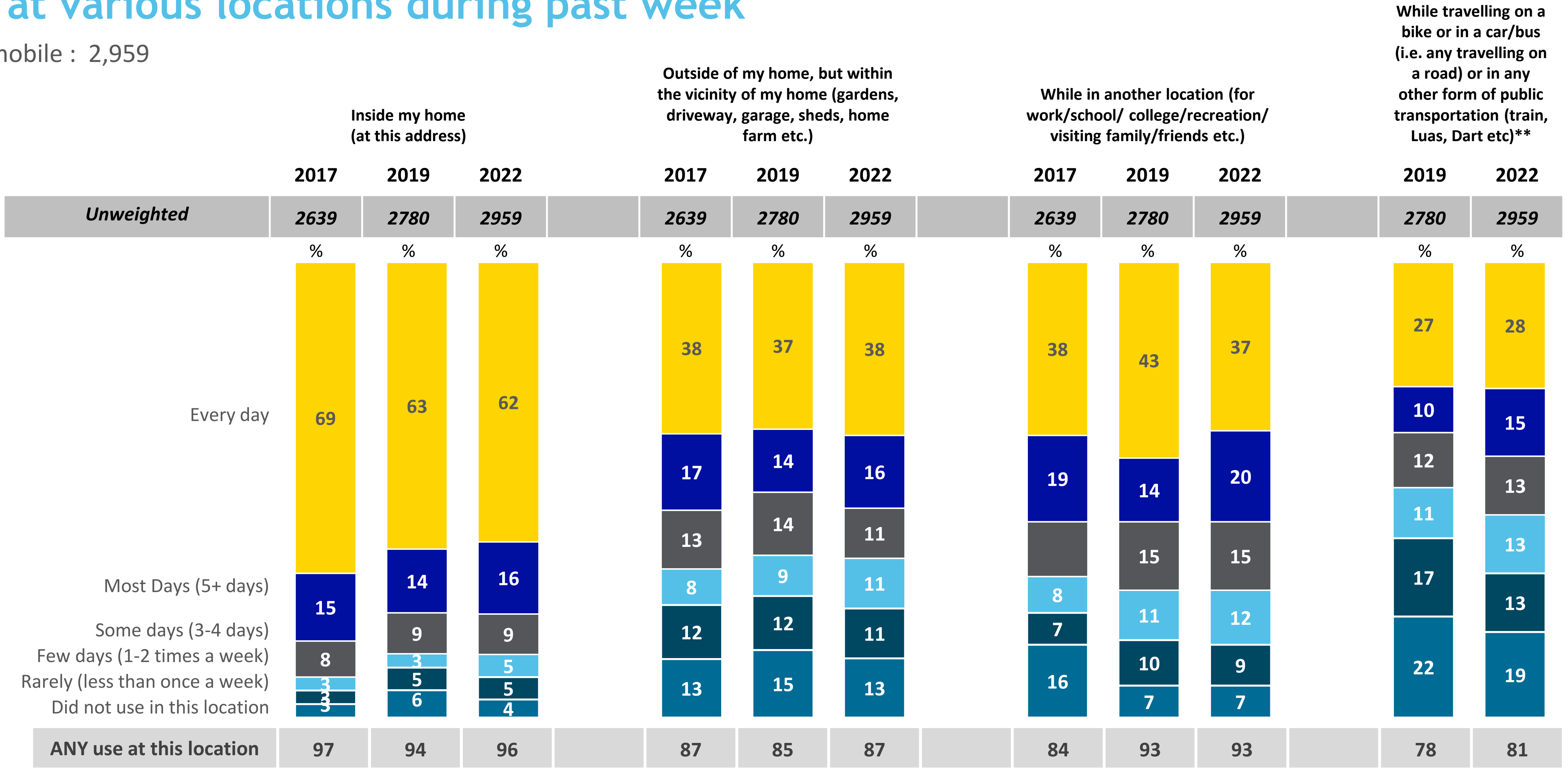
Sample				
Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
391	*343*	*339*	*311*	*299*
%	%	%	%	%
67	51	55	54	54
48	46	45	49	47
38	27	25	37	35
18	21	18	21	15
15	14	17	16	17
10	11	12	13	12
6	14	14	13	9
2	5	5	7	5
0	3	2	3	3
2	2	2	2	1

Many view calling from apps as being convenient, particularly in Sample 1. However close to half also note cost as a key factor in their decision. Many also note the popularity of these apps with 36% noting that their contacts use them.

Q.18 Why do you use internet-based applications to make voice/video calls?

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

Base: All have mobile : 2,959



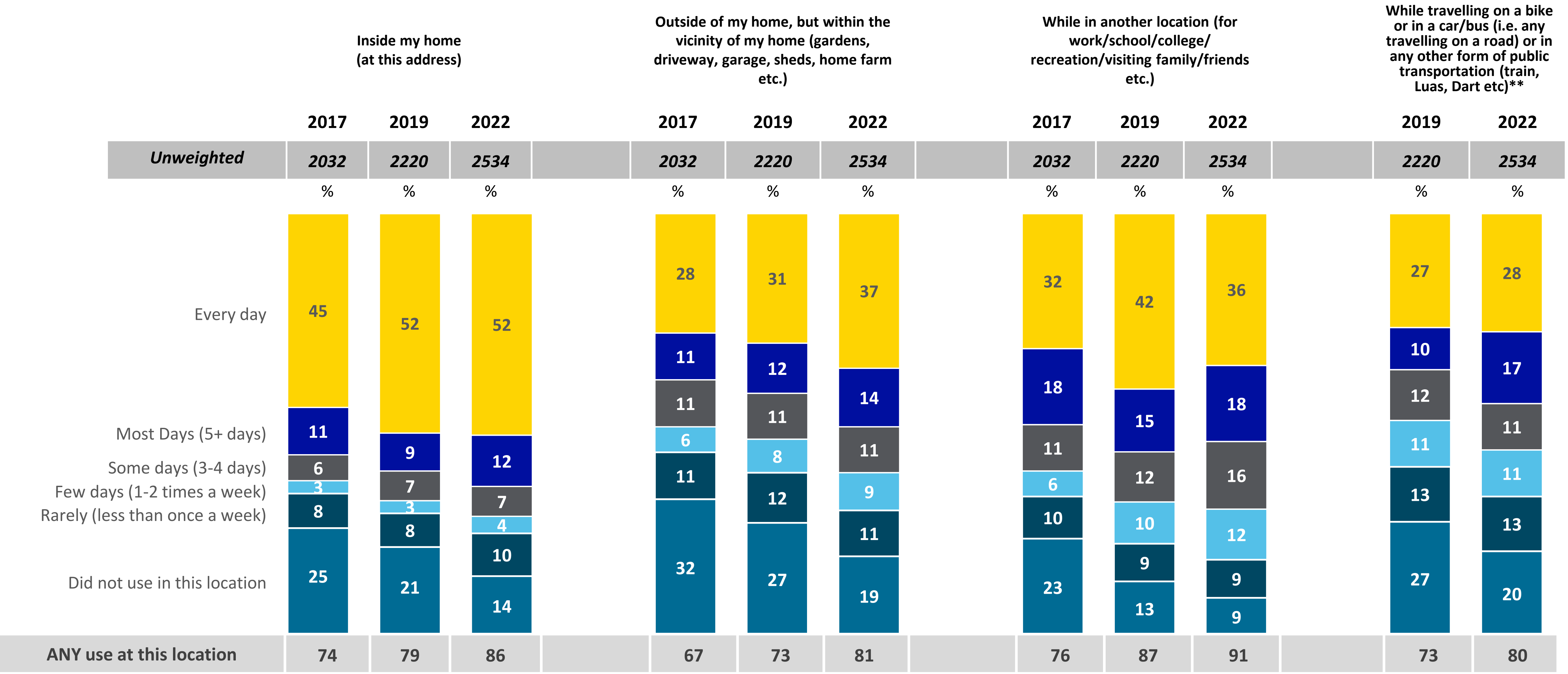
Incidence of use at various locations remains relatively comparable with 2017 and 2019 levels, but a decrease in ‘every day’ use ‘inside my home’ is noted longer term.

Q.19 How often in the following locations, did you typically use your mobile for voice calls, texts on the operators network – Inside my home (at this address) (not including your usage via wifi); Outside of my home, but within the vicinity of my home (gardens, driveway, garage, sheds, home farm etc.) (not including your usage via wifi); While in another location that you regularly/frequently visit (for work/school/college/recreation/visiting family/friends etc.); While travelling on a bike or in a car/bus or on any public transport?

***** Note question wording change***

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

Base: All have smartphone : 2534



Incidence of using data daily has increased since 2019, particularly when focusing on locations outside of the home.

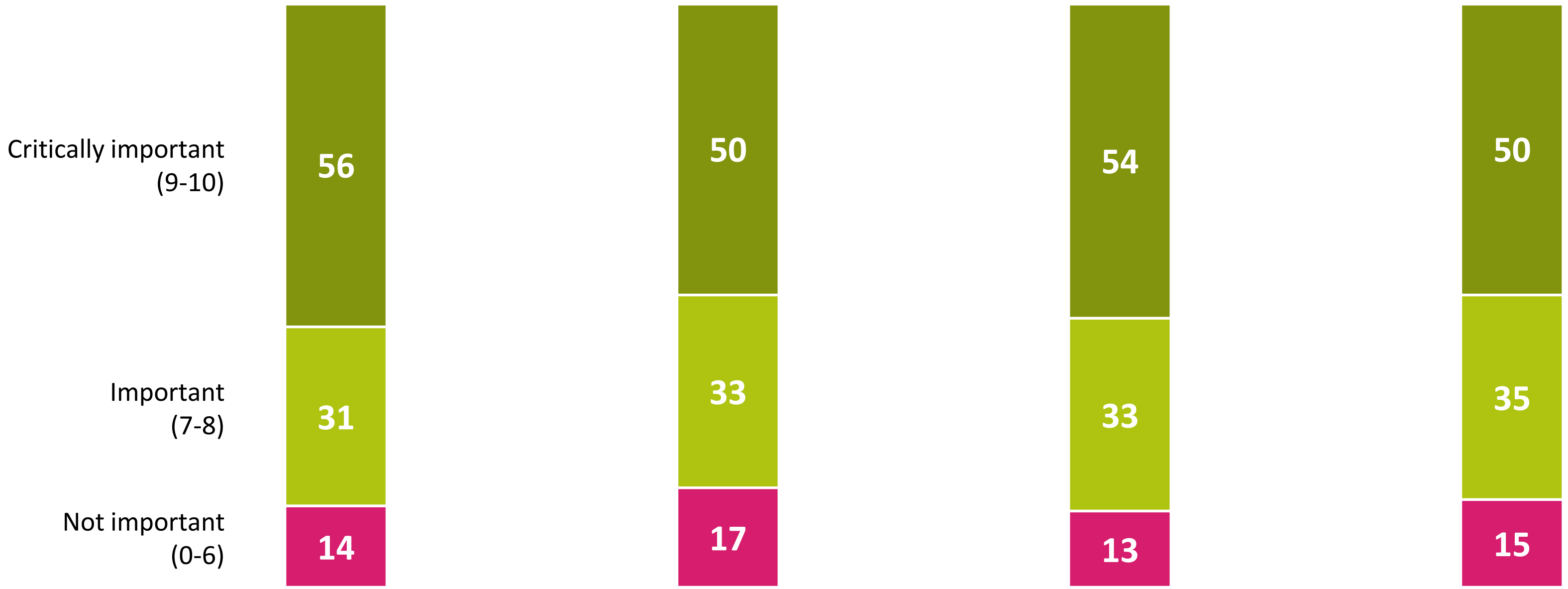
Q.19 How often in the following locations, did you typically use your mobile data (internet access) on the operators network – Inside my home (at this address) (not including your usage via wifi); Outside of my home, but within the vicinity of my home (gardens, driveway, garage, sheds, home farm etc.) (not including your usage via wifi); While in another location that you regularly/frequently visit (for work/school/college/recreation/visiting family/friends etc.); While travelling on a bike or in a car/bus or on any public transport?

***** Note question wording change***

Importance of mobile phone service when at various location

Base: All mobile service used in location during past week

	Inside my home (at this address)	Outside of my home, but within the vicinity of my home (gardens, driveway, garage, sheds, home farm etc.)	While in another location (for work/school/college /recreation/visiting family/friends etc.)	**While travelling on a bike or in a car/bus (i.e. any travelling on a road) or in any other form of public transportation (train, Luas, Dart etc)
Unweighted	2855	2627	2747	2341
	%	%	%	%



	Inside my home	Outside of my home	While in another location	**While travelling
2022 Mean	8.36	8.15	8.34	8.17
2019 Mean	8.49	8.40	8.63	8.59
2017 Mean	8.38	8.23	8.43	n/a

Access is of critical importance irrespective of location. The rate of importance is similar to levels seen in previous years.

Q.20 Level of importance – Inside my home (at this address) (not including your usage via wifi); Outside of my home, but within the vicinity of my home (gardens, driveway, garage, sheds, home farm etc.) (not including your usage via wifi); While in another location that you regularly/frequently visit (for work/school/college/recreation/visiting family/friends etc.); While travelling on a bike or in a car/bus or on any public transport?

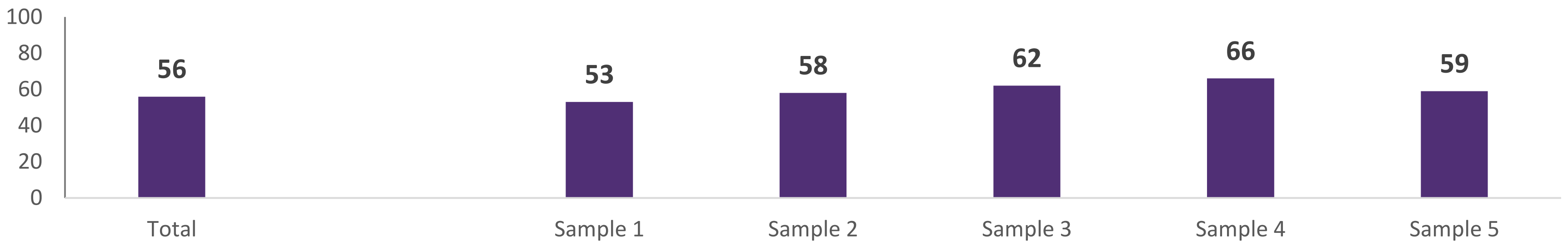
***** Note question wording change***

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

Base: All mobile service used in location during past week

UNWTD	2855		567	562	580	570	576

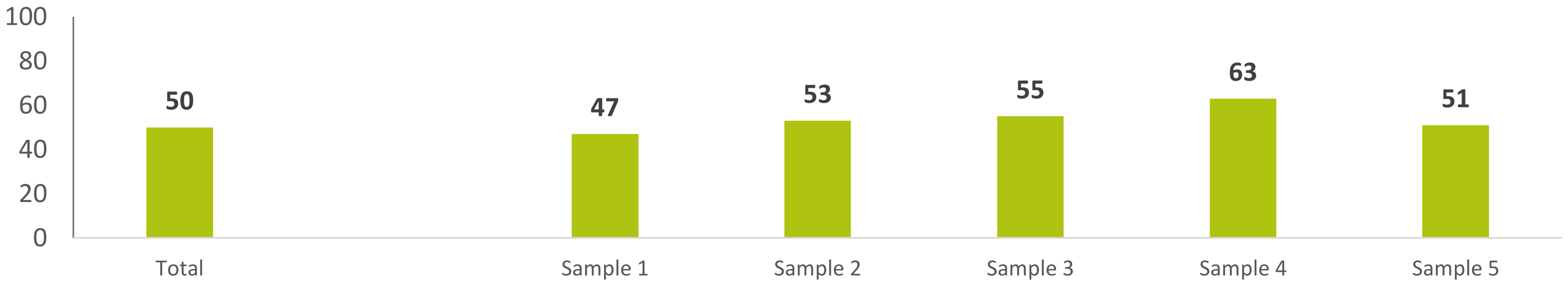
Inside my home (at this address)



9-10 Score 2019	60		58	64	63	58	59
9-10 Score 2017	56		56	54	55	59	51

UNWTD	2627		514	509	526	530	548

Outside my home but within the vicinity of my home (gardens, driveway, garage, sheds, home farm, etc.)



9-10 Score 2019	58		57	60	61	56	51
9-10 Score 2017	50		50	51	49	52	50

Interestingly, those in samples 1 and 5 are least likely to view access at these locations as critically important (ie most urban and most rural areas).

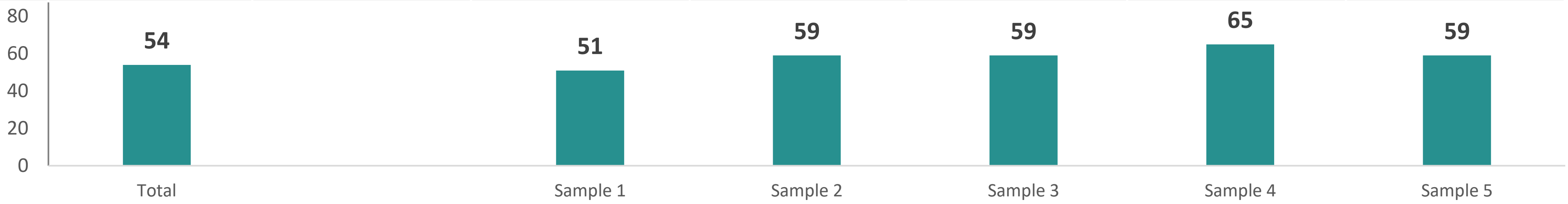
Q.20 Level of importance..

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

Base: All mobile service used in location during past week

UNWTD	2341		422	435	493	595	396
	%		%	%	%	%	%

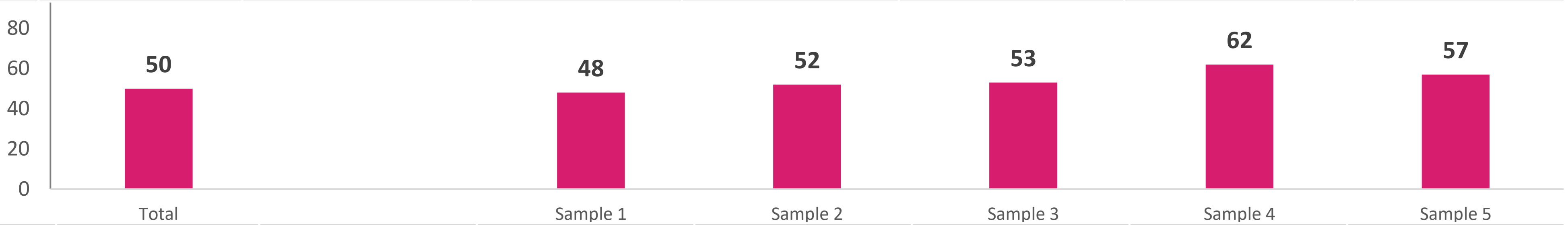
While in another location (for work/school/college/ recreation/visiting family/friends etc.)



9-10 Score 2019	61		59	68	66	63	55
9-10 Score 2017	55		55	51	58	60	56

UNWTD	2341		508	421	472	459	481
	%		%	%	%	%	%

**While travelling in a car/bus or any form of public transportation



9-10 Score 2019	64		62	68	71	63	51
9-10 Score 2017	52		50	52	56	62	53

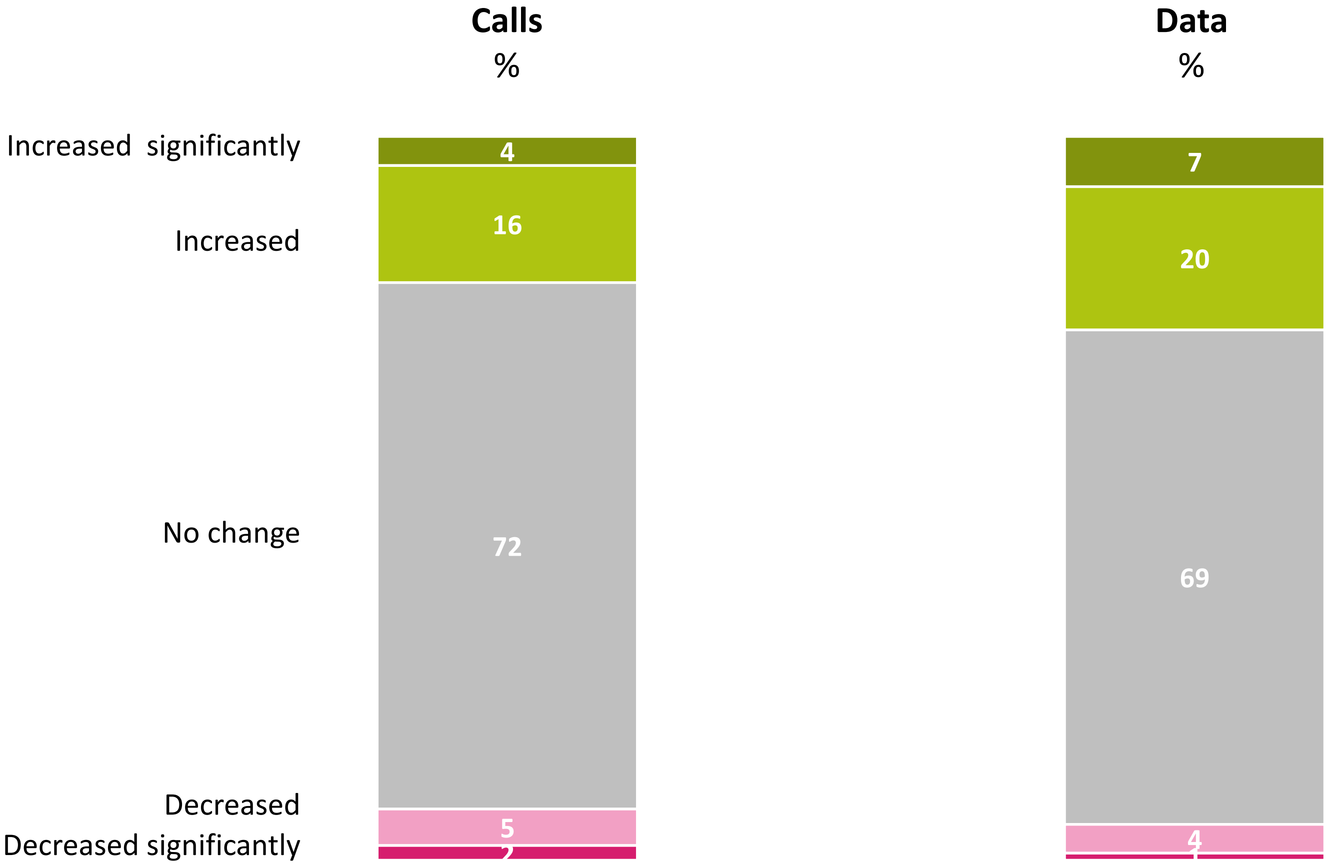
Those in more urban sample are less likely to view service as important while travelling or being in a different location.

****** Note question wording change (data not comparable)***

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)

Reliance on mobile phone service

Base: All mobile users – n = 2,959



	Calls		Data
NET (Increase)	20		27
NET (Decrease)	7		5

The importance of data is increasing with over a quarter noting that their reliance on data has increased over the past year. Calls are also important with 1 in 5 noting increased reliance.

Q.21 Over the past year, has your reliance on your mobile for the following changed?

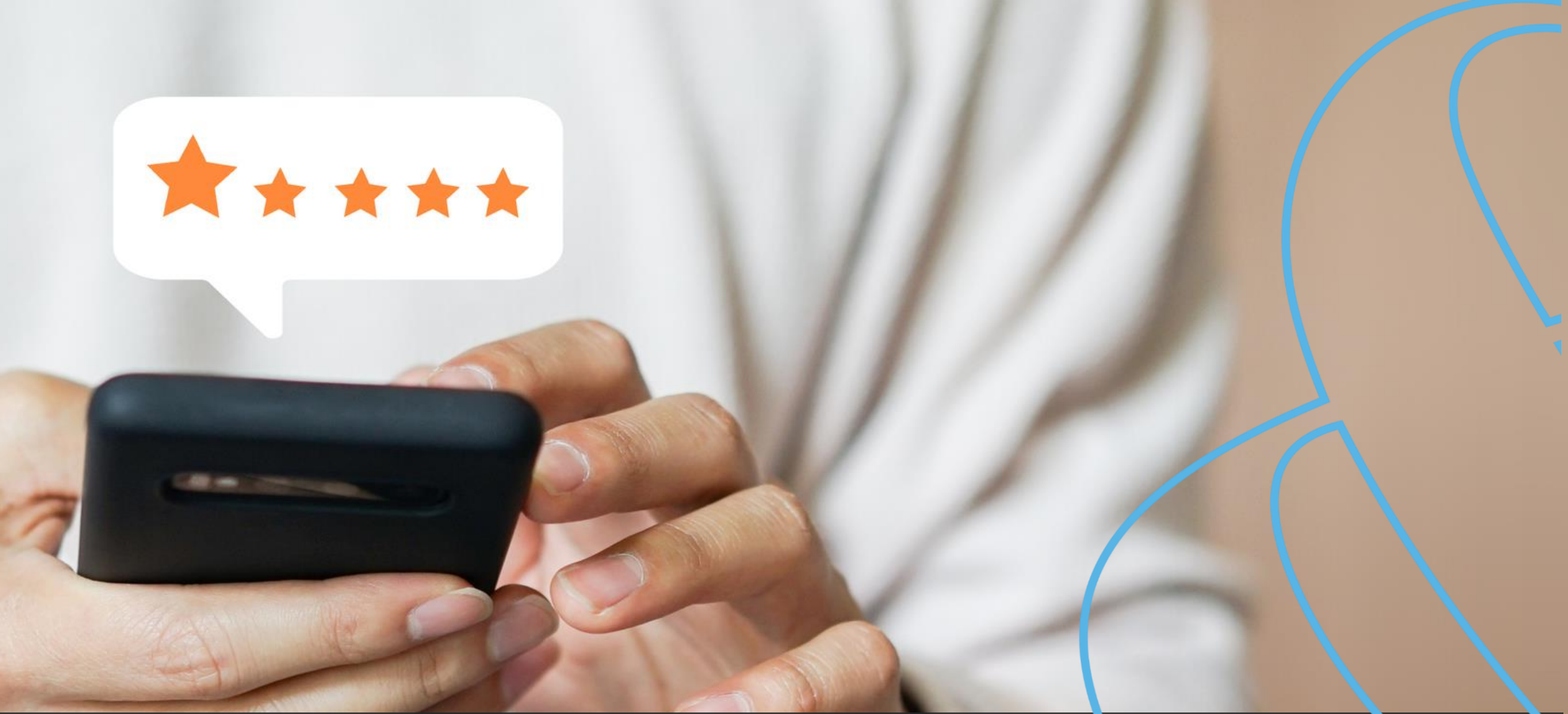
Importance of mobile phone service when at various location x net increased

Base: All mobile users – n = 2,959

	Total	Age					Social Class		Sample				
		18-24	25-34	35-49	50-64	65+	ABC1F50+	C2DEF50-	Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
UNWTD	*2959*	*236*	*397*	*873*	*760*	*693*	*1285*	*1674*	*589*	*593*	*595*	*586*	*596*
	%	%	%	%	%	%	%	%	%	%	%	%	%
Calls	**20**	**26**	**23**	**22**	**18**	**14**	**23**	**18**	**21**	**16**	**21**	**17**	**21**
Data	**27**	**36**	**36**	**33**	**19**	**11**	**31**	**23**	**28**	**24**	**25**	**25**	**25**

In particular, the importance of data is growing among those under 50, while the importance of calls, perhaps unexpectedly, has increased in those under 25. It is important to note that increased reliance on data has been seen across all sample areas.

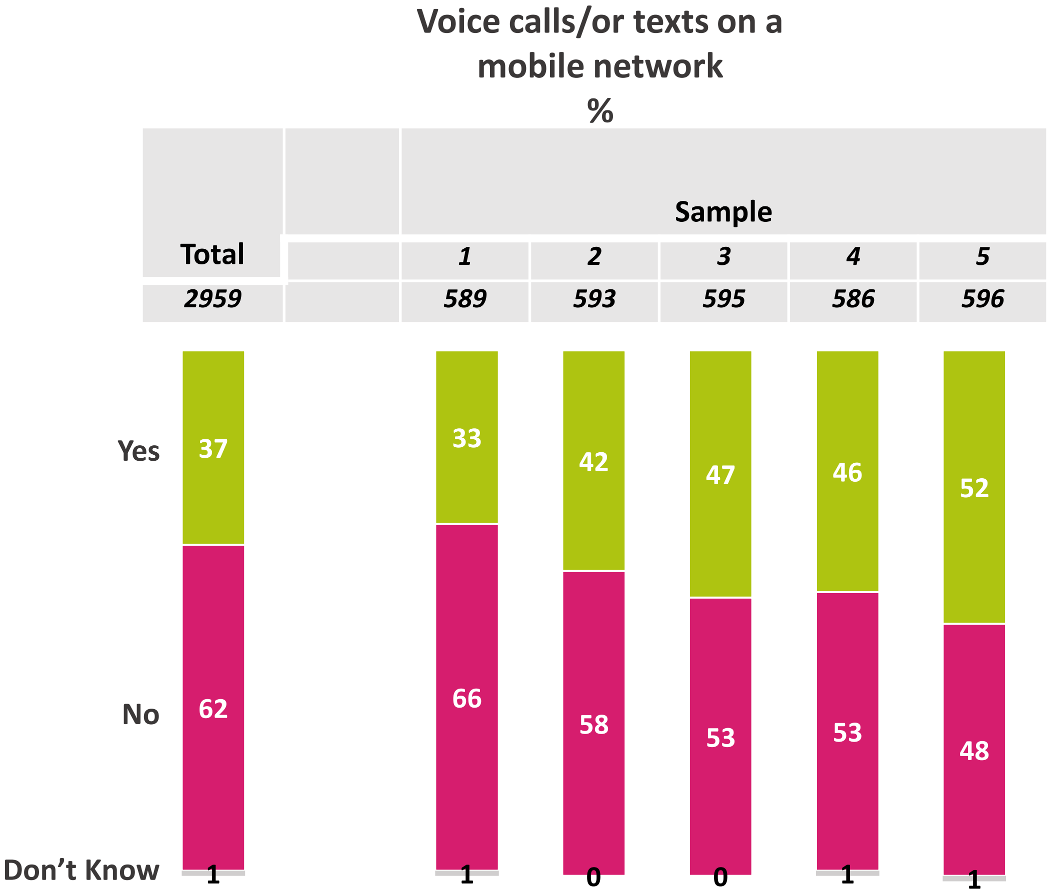
Q.21 Over the past year, has your reliance on your mobile for the following changed?

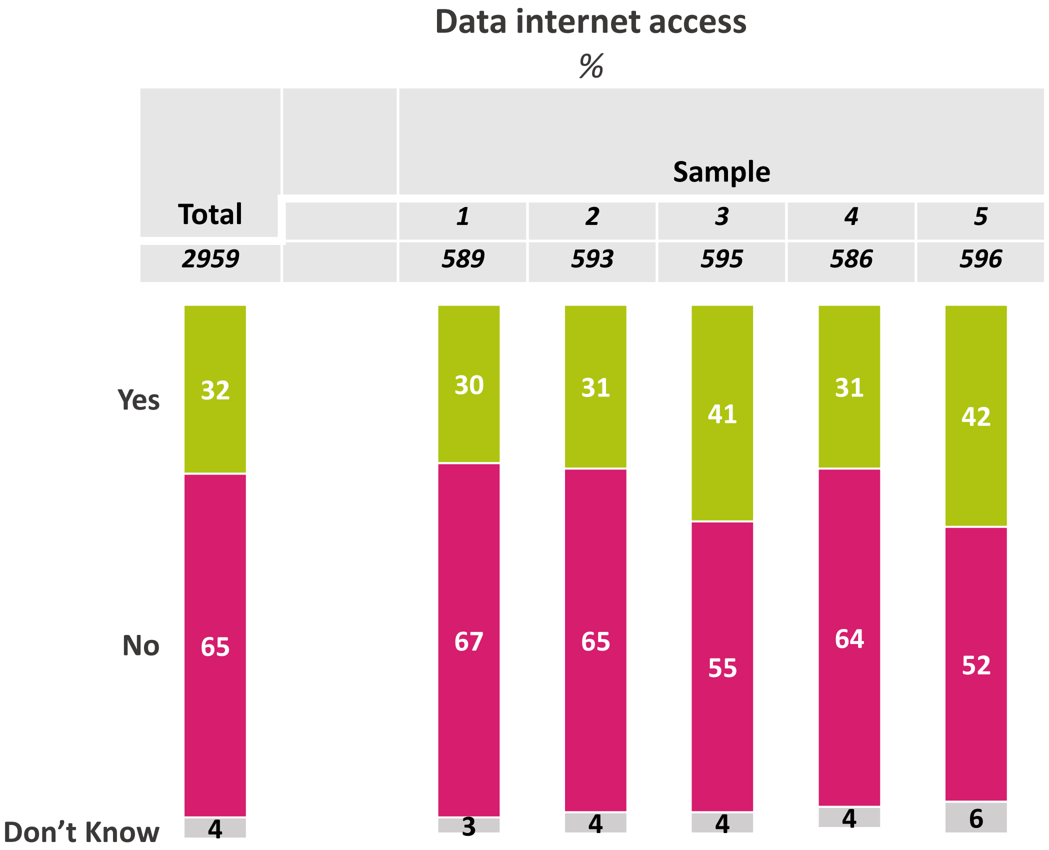


Coverage Issues And Satisfaction

Experienced a loss of signal (or no/poor coverage) when using the following services in past month

Base: All mobile users – n = 2959





In the last month, 37% have experienced loss of signal when using call / text functions on mobile networks, while 32% have experienced loss of signal when using data. Those in very rural areas note higher incidences of disruptions.

Q.19a Thinking about your mobile phone experience over the past month, have you experienced a loss of signal when using the following services? -

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

Base: All use mobile for voice calls and texts at each location and experienced a loss of signal in the last month

*Question wording change in 2022

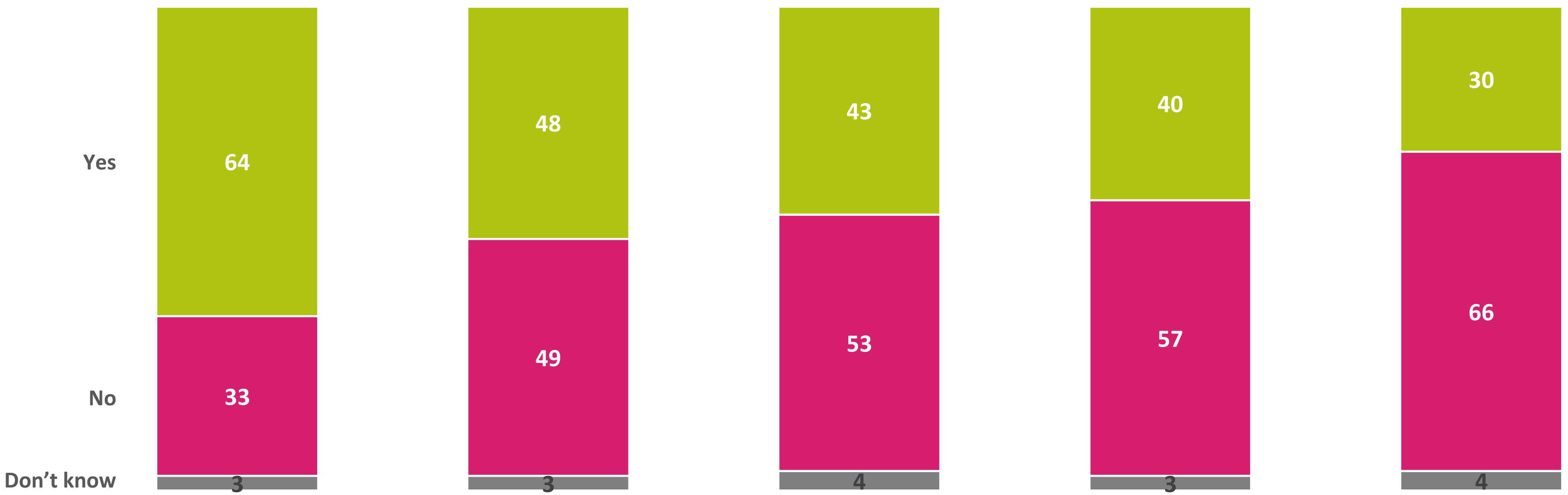
In the case of Voice calls/texts, almost 2 in 3 of those who have experienced a loss of signal did so in a specific part of the home, while half have experienced a loss of signal throughout the home.

Q.19a Thinking about your mobile phone experience over the past month, have you experienced a loss of signal when using the following services? -

Incidence of experiencing various service issues for data, past month at particular locations

Base: All use mobile for data at each locations and experienced a loss of signal in the last month

	Loss of Signal (or no/poor signal/coverage) in a specific room/part of my home while other rooms/part of my home have signal	Loss of Signal (or no/poor signal/coverage) throughout my entire home	Loss of Signal (or no/poor signal/coverage) around or 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.)	While travelling (in a car, bike or any form of public transportation)
Unweighted	*995*	*950*	*950*	*1079*	*888*
	%	%	%	%	%



**Question wording change in 2022*

Data service issues are roughly as frequent as calls and texts, with just under 2 in 3of those who have experienced loss of signal doing so in a specific part of the home, while under half have experienced a loss of signal throughout the home.

Q.19a Thinking about your mobile phone experience over the past month, have you experienced for data

* Data combined in previous research

Incidence of experiencing various service issues x region

Base: All using mobile for voice/data at each location and experienced loss of signal in the last month

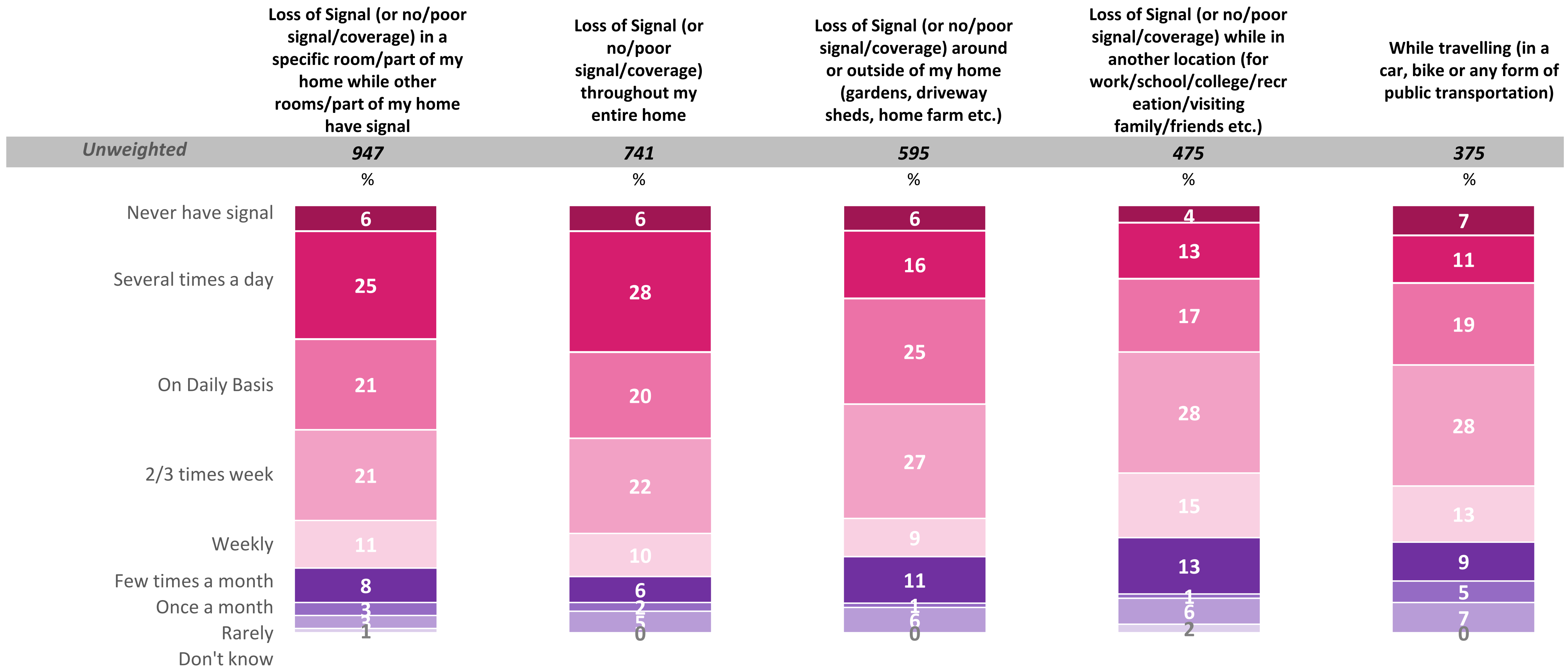
	Total	Sample				
		Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
Voice Calls/Texts						
Base:	**1316**	**208**	**242**	**287**	**272**	**307**
Loss of Signal in a specific room/part of my home while other rooms/part of my home have signal	65%	59%	71%	73%	74%	76%
Base:	**1225**	**188**	**223**	**269**	**250**	**295**
Loss of Signal throughout my entire home	49%	41%	63%	59%	63%	68%
Base:	**1225**	**188**	**223**	**269**	**250**	**295**
Loss of Signal around or outside of my home	44%	40%	46%	49%	50%	59%
Base:	**1290**	**208**	**245**	**275**	**262**	**300**
Loss of Signal while in another location	38%	39%	35%	37%	37%	41%
Base:	**1094**	**193**	**174**	**241**	**221**	**265**
While travelling	30%	26%	35%	38%	34%	38%
Data						
Base:	**995**	**176**	**189**	**210**	**183**	**237**
Loss of Signal in a specific room/part of my home while other rooms/part of my home have signal	64%	58%	71%	76%	74%	74%
Base:	**950**	**168**	**180**	**196**	**178**	**228**
Loss of Signal throughout my entire home	48%	41%	57%	56%	65%	62%
Base:	**950**	**168**	**180**	**196**	**178**	**228**
Loss of Signal around or outside of my home	43%	40%	50%	48%	47%	59%
Base:	**1079**	**193**	**205**	**230**	**201**	**250**
Loss of Signal while in another location	40%	41%	37%	42%	34%	42%
Base:	**888**	**174**	**145**	**194**	**165**	**210**
While travelling	30%	26%	31%	42%	33%	35%

Indoor voice issues are most common in sample areas 2-5 (higher in more rural areas). In sample area 5 (rural) voice issues around the outside of the home are also higher. Indoor data issues follow a similar regional pattern.

Q.19a Thinking about your mobile phone experience over the past month, have you experienced the following? voice call and texts

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

Base: All experiencing various mobile voice calls and texts issues at various locations in the past month



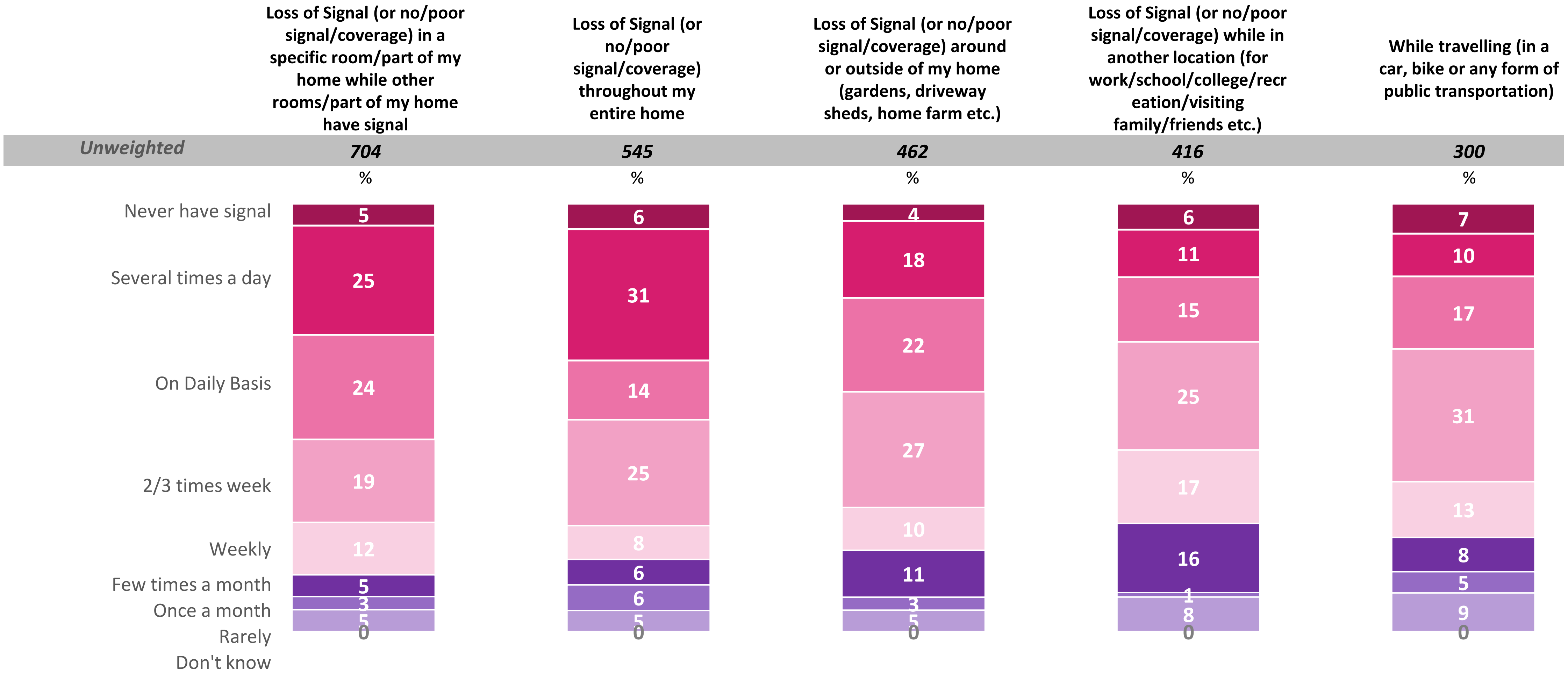
Any (Daily Issues)	52	54	46	34	38

Over 50% experience daily issues in relation to voice calls/texts in their home or a specific part of their home. Those in rural areas are impacted more, with 62% of rural dwellers noting daily issues in a part of their home, for example.

Q.19b And how often do you experience for voice call and texts?

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

Base: All experiencing various mobile data issues at various locations in the past month



Any (Daily Issues)	54	50	45	32	34

Frequency of data issues is similar to voice/text issues, with more than half experiencing loss of signal in the home, or in a specific part of the home on a daily basis. Rural dwellers are impacted more by signal issues with 62% noting daily issues in a specific part of the home.

Q.19b And how often do you experience for data?

Daily experiencing various service issues x region

Base: All noting issues in various locations in the past month

	Total	Sample				
		Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
Voice Calls/Texts						
ANY DAILY ISSUES - Base:	***947***	***123***	***174***	***211***	***201***	***238***
Loss of Signal in a specific room/part of my home while other rooms/part of my home have signal	52%	45%	51%	66%	63%	72%
Base:	***741***	***79***	***140***	***160***	***159***	***203***
Loss of Signal throughout my entire home	54%	46%	59%	62%	66%	63%
Base:	***595***	***71***	***103***	***130***	***124***	***167***
Loss of Signal around or outside of my home	46%	37%	51%	60%	55%	62%
Base:	***475***	***76***	***83***	***102***	***94***	***120***
Loss of Signal while in another location	34%	26%	45%	47%	50%	37%
Base:	***375***	***48***	***60***	***91***	***75***	***101***
While travelling	38%	36%	30%	43%	44%	30%
Data						
ANY DAILY ISSUES - Base:	***704***	***100***	***132***	***161***	***137***	***174***
Loss of Signal in a specific room/part of my home while other rooms/part of my home have signal	54%	49%	49%	65%	66%	66%
Base:	***545***	***72***	***100***	***112***	***117***	***144***
Loss of Signal throughout my entire home	50%	42%	52%	58%	68%	59%
Base:	***462***	***66***	***90***	***94***	***83***	***129***
Loss of Signal around or outside of my home	45%	37%	51%	58%	53%	56%
Base:	***416***	***72***	***73***	***97***	***71***	***103***
Loss of Signal while in another location	32%	27%	45%	40%	43%	35%
Base:	***300***	***44***	***46***	***80***	***55***	***75***
While travelling	34%	33%	23%	37%	44%	31%

Daily voice issues indoors higher in sample areas 2-5, with outside/around home issues most prominent in sample 5.
Daily Data issues indoor higher in sample areas 3-5, with similar issues outside/around home in the most rural area(s).

Q.19b And how often do you experience …for voice calls and texts? for data?

Experience a loss of voice signal in each of these locations

Base: All experiences of lost signal - 3374

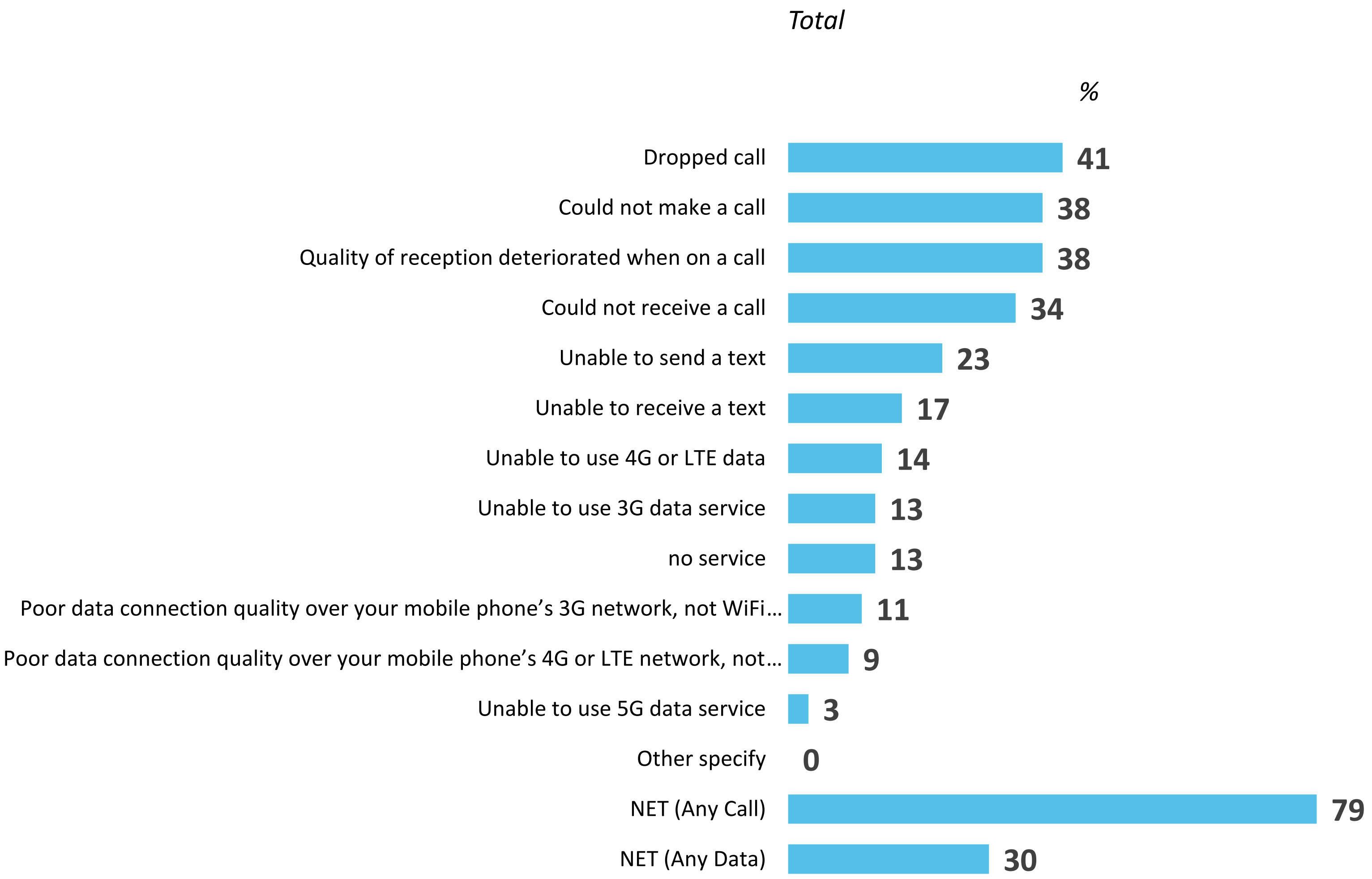
	Total %	Loss of Signal (or no/poor signal/coverage) in a specific room/part of my home while other rooms/part of my home have signal	Loss of Signal (or no/poor signal/coverage) throughout my entire home	Loss of Signal (or no/poor signal/coverage) around or outside of my home (gardens, driveway sheds, home farm etc.)	Loss of Signal (or no/poor signal/coverage) while in another location (for work/school/college/recreation/visiting family/friends etc.)	While travelling (in a car, bike or any form of public transportation)
		1004	*791*	*645*	*534*	*400*
		%	%	%	%	%
Dropped call	41	45	46	36	33	44
Could not make a call	38	41	46	38	31	28
Quality of reception deteriorated when on a call	38	39	37	39	38	37
Could not receive a call	34	37	44	34	24	24
Unable to send a text	23	22	32	25	19	15
Unable to receive a text	17	15	21	18	15	14
Unable to use 4G or LTE data	14	16	14	11	20	9
Unable to use 3G data service	13	13	13	9	16	10
no service	13	10	11	11	17	23
Poor data connection quality over your mobile…	11	11	14	10	12	7
Poor data connection quality over your mobile…	9	7	10	9	14	6
Unable to use 5G data service	3	2	2	3	5	2
Other specify	0	0	0	0	0	0
NET (Any Call)	79	81	80	79	74	77
NET (Any Data)	30	30	31	28	37	21

Call related issues are most notable within the home, while issues regarding data are most notable in another location.

Q.22 You said that you experienced the last month for voice calls and text. What did you experience?

Experience a loss of signal in the last month in each of these locations

Base: All experiences of lost signal - 3374



	2017	2019	2022	Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
	*3126**	*3554**	*3374**	449	609	740	699	877
	%	%	%	%	%	%	%	%
Dropped call	32	37	41	40	48	41	43	43
Could not make a call	37	37	38	33	45	40	50	51
Quality of reception deteriorated when on a call	50	38	38	38	43	34	42	44
Could not receive a call	31	29	34	30	37	37	43	43
Unable to send a text	19	19	23	20	27	24	30	33
Unable to receive a text	31	29	17	14	20	19	21	26
Unable to use 4G or LTE data	9	17	14	15	16	14	9	14
Unable to use 3G data service	16	14	13	12	15	13	12	20
no service	18	14	13	10	15	21	12	22
Poor data connection quality over your mobile phone’s 3G network, not WiFi…	12	16	11	13	9	9	8	9
Poor data connection quality over your mobile phone’s 4G or LTE network, not…	7	17	9	12	6	7	7	7
Unable to use 5G data service	n/a	n/a	3	3	3	2	3	4
Other specify	1	2	0	0	1	0	1	1
NET (Any Call)	78	76	79	77	82	79	84	80
NET (Any Data)	29	35	30	33	30	26	20	29

Dropped calls and not being able to receive a call or send a text have increased in frequency since 2019. There have been significant reductions in numbers not being able to receive texts.

* Base size based on responses not respondents

Q.22 You said that you experienced Loss of Signal (or no/poor signal/coverage) in a specific room/part of my home while other rooms/part of my home have signal in the last month. What did you experience?

Service issues experienced during past month across voice and data 2022 vs 2019

Base: All who experienced voice or data issues over the past month: voice or data

	TOTAL 2019 %	TOTAL 2022 %	Loss of Signal (or no/poor signal/coverage) throughout my entire home 2019 %	Loss of Signal (or no/poor signal/coverage) throughout my entire home 2022 %	Loss of Signal (or no/poor signal/coverage) in a specific room/part of my home (for example in the Kitchen or a bedroom) 2019 %	Loss of Signal (or no/poor signal/coverage) in a specific room/part of my home (for example in the Kitchen or a bedroom) 2022 %	Loss of Signal (or no/poor signal/coverage) around the outside of my home (gardens, driveway sheds, home farm etc.) 2019 %	Loss of Signal (or no/poor signal/coverage) around the outside of my home (gardens, driveway sheds, home farm etc.) 2022 %	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)** 2019 %	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)** 2022 %
Unweighted	*3554*	*3374*								
Quality of reception deteriorated when on a call	38	38	36	39	43	37	41	39	35	38
Could not make a call	37	38	37	41	40	46	43	38	31	31
Dropped call	37	41	38	45	40	46	38	36	31	33
Could not receive a call	29	34	34	37	31	44	26	34	23	24
Unable to send a text	19	23	19	22	21	32	21	25	16	19
no service	14	13	12	10	12	11	12	11	21	17
Unable to use 3G data service	14	13	14	13	16	13	18	9	10	16
Unable to receive a text	19	17	20	15	18	21	17	18	22	15
Unable to use 4G or LTE data	17	14	16	16	15	14	17	11	16	20
Poor data connection quality over your mobile phone's 3G network, not Wi-Fi (for example email, internet, Facebook, WhatsApp etc.)	16	11	16	11	18	14	17	10	17	12
Poor data connection quality over your mobile phone's 4G or LTE network, not Wi-Fi (for example email, internet, Facebook, WhatsApp etc.)	17	9	17	7	16	10	19	9	17	14
Unable to use 5G data service	0	3	4	2	0	2	1	3	2	5
Other specify	2	0	0	0	0	0	0	0	0	0
NET (Any Call)	76	79	78	81	80	80	79	79	69	74

Q.22 You said that you experienced in the last month for voice calls and text. What did you experience?

*** Routing / base size change in 2022*

Type of signal issue outside of home x demographics

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Base: All who experienced loss of signal around the outside of my home - 645

	Total	Age					Social Class		Sample				
		18-24	25-34	35-49	50-64	65+	ABC1F50+	C2DEF50-	1	2	3	4	5
UNWTD	*1004*	*97*	*149*	*307*	*256*	*195*	*441*	*563*	*82*	*118*	*135*	*129*	*181*
	%	%	%	%	%	%	%	%	%	%	%	%	%
Dropped call	36	24	37	41	34	42	32	41	32	47	38	40	47
Could not make a call	38	39	32	36	43	39	37	38	33	43	44	45	49
Quality of reception deteriorated when on a call	39	55	35	44	31	32	39	40	42	42	27	42	44
Could not receive a call	34	25	32	35	42	35	41	28	28	42	43	41	45
Unable to send a text	25	15	28	28	29	19	28	22	22	28	26	32	32
Unable to receive a text	18	12	21	18	20	19	18	18	15	25	21	22	28
Unable to use 3G data service	9	5	10	9	11	9	10	8	7	12	14	9	16
Unable to use 4G or LTE data	11	20	19	12	4	2	10	12	10	18	15	6	12
Unable to use 5G data service	3	3	5	4	1	0	5	1	3	3	2	4	4
Poor data connection quality over your mobile phone's 3G network,	10	4	8	11	13	9	11	9	11	9	10	6	7
Poor data connection quality over your mobile phone's 4G or LTE network	9	14	7	12	11	2	11	8	12	6	7	6	6
no service	11	3	7	13	14	13	13	8	6	13	23	13	16

**Caution small base*

Q.22 You said that you experienced Loss of Signal (or no/poor signal/coverage) around or outside of my home (gardens, driveway sheds, home farm etc.) in the last month for voice calls and text. What did you experience?

Type of signal issue in specific part of home x demos

Base: All who experienced loss of signal in specific part of home – n = 1004

	Total	Age					Social Class		Sample				
		18-24	25-34	35-49	50-64	65+	ABC1F50+	C2DEF50-	1	2	3	4	5
	1004	97	149	307	256	195	441	563	138	185	221	210	250
	%	%	%	%	%	%	%	%	%	%	%	%	%
Dropped call	45	29	38	51	50	51	46	44	43	50	47	47	48
Could not make a call	41	29	41	41	45	45	39	42	35	48	43	54	57
Quality of reception deteriorated when on a call	39	34	40	41	31	50	39	39	36	43	39	48	46
Could not receive a call	37	36	29	30	48	48	40	34	33	38	40	49	47
Unable to send a text	22	19	18	20	27	30	20	24	17	26	29	32	36
Unable to receive a text	15	6	14	17	13	24	15	15	9	20	26	19	27
Unable to use 3G data service	13	18	17	14	9	12	11	16	12	16	15	15	25
Unable to use 4G or LTE data	16	34	17	15	10	6	17	15	15	17	18	13	15
Unable to use 5G data service	2	2	2	2	3	0	2	2	2	2	2	2	3
Poor data connection quality over your mobile phone's 3G network, not WiFi (for example email, internet, facebook, whatsapp etc.)	11	11	15	10	12	4	16	6	10	10	11	13	12
Poor data connection quality over your mobile phone's 4G or LTE network, not WiFi (for example email, internet, facebook, whatsapp etc.)	7	8	9	10	6	2	10	5	7	7	8	9	8
no service	10	8	13	9	14	5	11	10	8	14	17	6	18
Other specify	0	-	0	0	-	-	0	0	0	-	-	0	2

Q.22 You said that you experienced Loss of Signal (or no/poor signal/coverage) in a specific room/part of my home while other rooms/part of my home have signal in the last month for voice calls and text. What did you experience?

Type of signal issue throughout entire home x demographics

Base: All who experienced loss of signal throughout home – n = 791

	Total	Age					Social Class		Sample				
		18-24	25-34	35-49	50-64	65+	ABC1F50+	C2DEF50-	1	2	3	4	5
	791	64	115	245	206	161	344	447	89	149	167	174	212
	%	%	%	%	%	%	%	%	%	%	%	%	%
Dropped call	46	34	38	54	42	48	51	42	46	50	44	45	52
Could not make a call	46	45	48	44	49	48	48	45	42	51	44	57	57
Quality of reception deteriorated when on a call	37	29	34	50	31	23	36	38	33	43	31	49	48
Could not receive a call	44	46	44	34	52	53	49	39	43	39	42	53	49
Unable to send a text	32	37	40	28	30	31	32	31	33	33	26	34	39
Unable to receive a text	21	20	27	20	18	21	19	22	19	21	21	25	32
Unable to use 3G data service	13	27	15	10	18	3	16	10	12	15	12	14	25
Unable to use 4G or LTE data	14	33	22	12	8	8	13	15	17	13	12	8	16
Unable to use 5G data service	2	1	2	4	1	0	2	2	2	1	2	1	5
Poor data connection quality over your mobile phone's 3G network, not WiFi (for example email, internet, facebook, whatsapp etc.)	14	20	9	19	11	9	15	13	18	11	10	10	7
Poor data connection quality over your mobile phone's 4G or LTE network, not WiFi (for example email, internet, facebook, whatsapp etc.)	10	25	5	11	8	5	14	7	13	6	7	8	5
no service	11	22	9	8	10	10	14	7	4	15	23	11	22
Other specify	0	-	-	1	-	-	1	0	0	1	-	1	-

Q.22 You said that you experienced Loss of Signal (or no/poor signal/coverage) throughout my entire home in the last month for voice calls and text. What did you experience?

Type of signal issue in another location x demographics

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Base: All who experienced loss of signal in another location n = 534

	Total	Age					Social Class		Sample				
		18-24	25-34	35-49	50-64	65+	ABC1F50+	C2DEF50-	1	2	3	4	5
	534	60	88	176	123	87	265	269	86	93	119	106	130
	%	%	%	%	%	%	%	%	%	%	%	%	%
Dropped call	33	24	33	36	31	37	30	36	30	43	33	38	27
Could not make a call	31	27	24	29	40	38	24	40	26	38	30	47	46
Quality of reception deteriorated when on a call	38	25	44	47	28	40	36	42	41	42	34	26	38
Could not receive a call	24	10	26	24	33	23	25	23	19	35	28	33	36
Unable to send a text	19	13	24	18	22	13	20	17	18	21	19	23	30
Unable to receive a text	15	2	22	14	21	9	15	15	16	14	11	16	23
Unable to use 3G data service	16	11	21	18	14	14	13	21	18	19	12	9	17
Unable to use 4G or LTE data	20	22	29	20	18	5	18	23	24	21	14	8	14
Unable to use 5G data service	5	3	9	5	2	1	4	6	5	7	2	4	4
Poor data connection quality over your mobile phone’s 3G network, not WiFi (for example email, internet, facebook, whatsapp etc.)	12	12	17	14	6	1	12	11	16	4	5	3	9
Poor data connection quality over your mobile phone’s 4G or LTE network, not WiFi (for example email, internet, facebook, whatsapp etc.)	14	30	14	17	7	1	16	12	21	4	5	2	7
no service	17	19	15	22	13	15	19	15	16	17	20	16	23
Other specify	0	1	-	-	-	2	0	0	-	1	1	-	-

Q.22 You said that you experienced Loss of Signal (or no/poor signal/coverage) while in another location (for work/school/college/recreation/visiting family/friends etc.) in the last month for voice calls and text. What did you experience?

Type of signal issue while travelling x demographics

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Base: All who experienced loss of signal while travelling – n = 400

	Total	Age					Social Class		Sample				
		18-24	25-34	35-49	50-64	65+	ABC1F50 +	C2DEF50 -	1	2	3	4	5
	400	44	63	130	112	51	200	200	54	64	98	80	104
	%	%	%	%	%	%	%	%	%	%	%	%	%
Dropped call	44	35	45	41	52	42	48	38	47	43	35	43	26
Could not make a call	28	10	25	34	27	48	27	30	22	38	34	36	32
Quality of reception deteriorated when on a call	37	37	51	38	27	27	34	41	36	43	37	34	36
Could not receive a call	24	15	21	23	34	16	26	21	23	23	23	26	26
Unable to send a text	15	12	15	20	12	8	14	16	12	23	13	21	18
Unable to receive a text	14	26	16	12	8	11	15	12	13	21	9	19	12
Unable to use 3G data service	10	9	15	12	5	8	7	14	10	10	9	10	8
Unable to use 4G or LTE data	9	12	16	8	4	5	8	10	7	12	11	8	9
Unable to use 5G data service	2	3	5	2	1	0	2	2	2	1	3	3	6
Poor data connection quality over your mobile phone’s 3G network, not WiFi (for example email, internet, facebook, whatsapp etc.)	7	6	12	10	3	0	11	2	8	9	5	4	9
Poor data connection quality over your mobile phone’s 4G or LTE network, not WiFi (for example email, internet, facebook, whatsapp etc.)	6	6	11	7	1	0	8	2	7	5	3	5	10
no service	23	44	8	24	18	28	29	16	24	18	23	26	39
Other specify	0	-	-	1	0	1	0	0	-	1	-	2	1

Q.22 You said that you experienced While travelling (in a car, bike or any form of public transportation) in the last month for voice calls and text. What did you experience?

Duration of signal loss in the last month

Base: All experiencing different lost signals

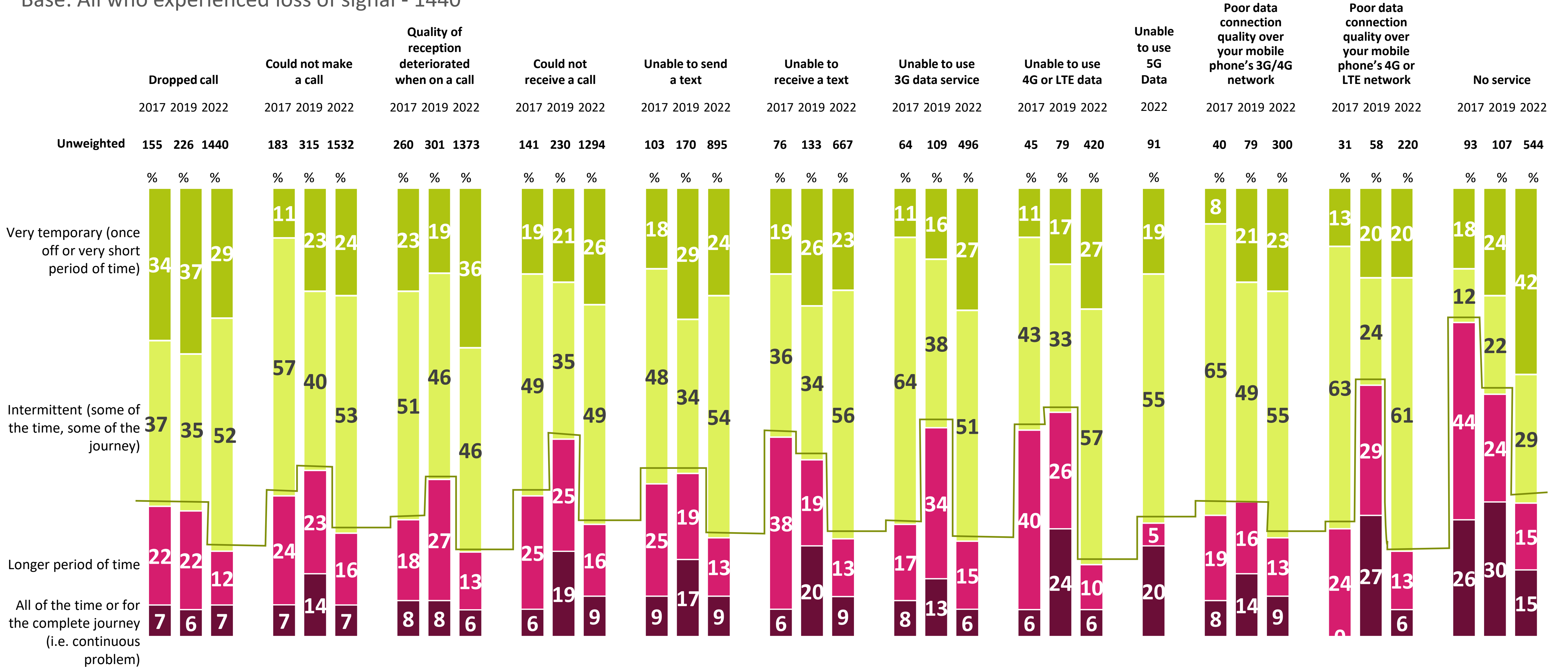
	Base Size		Length of time			
			Very temporary (once off or very short period of time)	Intermittent (some of the time)	Longer period of time	All of the time (i.e. continuous problem)
Dropped call	*1440*	%	29	52	12	7
Could not make a call	*1532*	%	24	53	16	7
Quality of reception deteriorated when on a call	*1373*	%	36	46	13	6
Could not receive a call	*1294*	%	26	49	16	9
Unable to send a text	*895*	%	24	54	13	9
Unable to receive a text	*667*	%	23	56	13	9
Unable to use 3G data service	*496*	%	27	51	15	6
Unable to use 4G or LTE data	*420*	%	27	57	10	6
Unable to use 5G data service	*91*	%	19	55	5	20
Poor data connection quality over your mobile phone's 3G network, not WiFi (for example email, internet, facebook, whatsapp etc.)	*300*	%	23	55	13	9
Poor data connection quality over your mobile phone's 4G or LTE network, not WiFi (for example email, internet, facebook, whatsapp etc.)	*220*	%	20	61	13	6
No service	*544*	%	42	29	15	15
Other	*18*	%	13	34	23	30

Q.23 How long did you experience this problem?

Length of time problem experienced

Base: All who experienced loss of signal - 1440

*Caution small base



There are much lower numbers reporting that outages lasted for a longer period of time or more, compared to prior years (though recognizing some comparison limitations). Equally, there has been a marked increase in those noting intermittent outages.

Q.23 How long did you experience this problem?

Satisfaction with mobile phone coverage x segments

Base: All have mobile : 2959

		Total	Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
		'22	'22	'22	'22	'22	'22
Unweighted		*2959*	*589*	*593*	*595*	*586*	*596*
		%	%	%	%	%	%
Satisfaction with your mobile phone network's coverage where you live (i.e. at home)	NET (9-10)	35	38	34	26	32	26
	NET (7-8)	40	42	36	43	33	35
	NET (1-6)	24	20	29	31	35	39
	Mean 2022	7.45	7.70	7.21	6.96	6.84	6.48
	Mean 2019	7.55	7.99	7.13	6.93	6.08	6.34
	Mean 2017	7.60	7.93	7.43	6.70	7.10	6.76
Satisfaction with your mobile phone network's coverage in other areas you visit/travel to	NET (9-10)	37	38	38	31	34	28
	NET (7-8)	44	46	40	41	42	44
	NET (1-6)	19	16	22	28	24	27
	Mean 2022	7.66	7.81	7.61	7.21	7.32	7.16
	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

Levels of satisfaction decrease the more rural the location. However, there have been improvements in some Sample areas (Sample 2, 4 and 5)

Q.24 How satisfied are your with your mobile phone network's coverage where you live (i.e. at home)?
Q.25 How satisfied are your with your mobile phone network's coverage in other areas you visit/travel to?

Satisfaction with Mobile phone coverage x demographics

Base: All have mobile : 2959

9-10 Score (out of 1-10)	Total	Age					Social Class	
		18-24	25-34	35-49	50-64	65+	ABC1F50+	C2DEF50-
	2959	*236*	*397*	*873*	*760*	*693*	*1285*	*1674*
	%	*%*	*%*	*%*	*%*	*%*	*%*	*%*
Satisfied with your mobile phone network's coverage where you live (i.e. at home)	**35**	**32**	**38**	**36**	**33**	**37**	**35**	**36**
Satisfied with your mobile phone network's coverage in other areas you visit/travel to	**37**	**36**	**40**	**35**	**33**	**41**	**37**	**37**

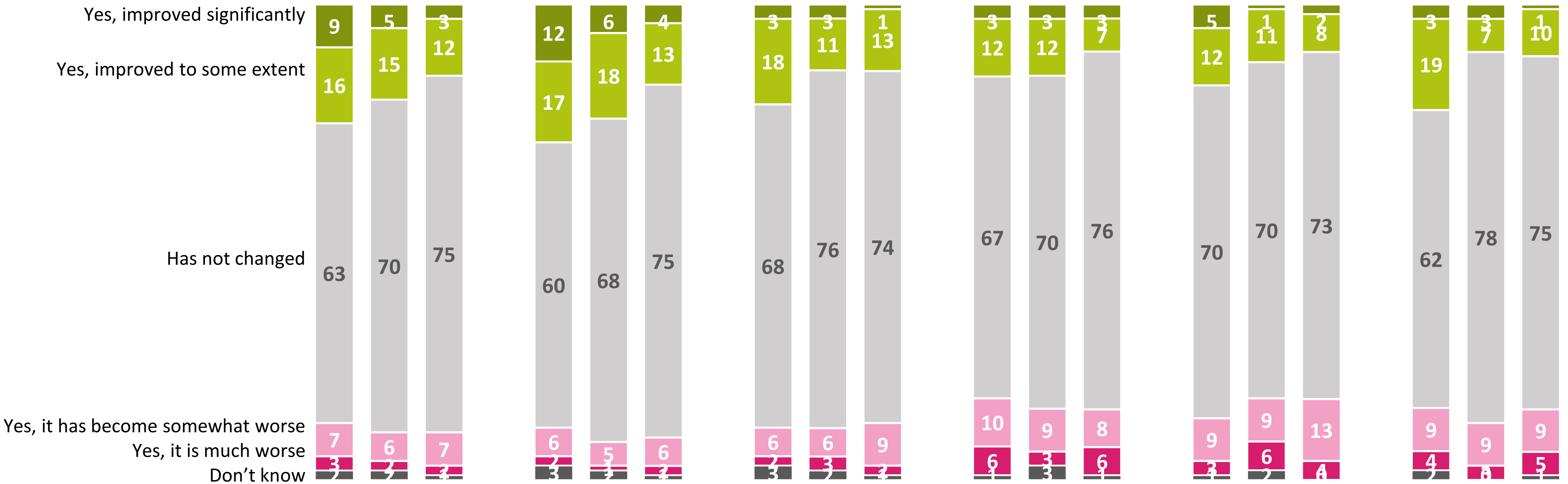
Customers over 65 are more likely to be satisfied regarding coverage in other areas outside of the home.

Q.24 How satisfied are your with your mobile phone network's coverage where you live (i.e. at home)?
Q.25 How satisfied are your with your mobile phone network's coverage in other areas you visit/travel to?

Mobile phone coverage experience over the last year x samples

Base: All have mobile : 2959

	Total			Sample 1			Sample 2			Sample 3			Sample 4			Sample 5		
	‘17	’19	’22	‘17	’19	’22	‘17	’19	’22	‘17	’19	’22	‘17	’19	’22	‘17	’19	’22
Unweighted	*2639*	*2780*	*2959*	*486*	*495*	*589*	*470*	*506*	*593*	*576*	*595*	*595*	*657*	*698*	*586*	*450*	*486*	*596*
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%



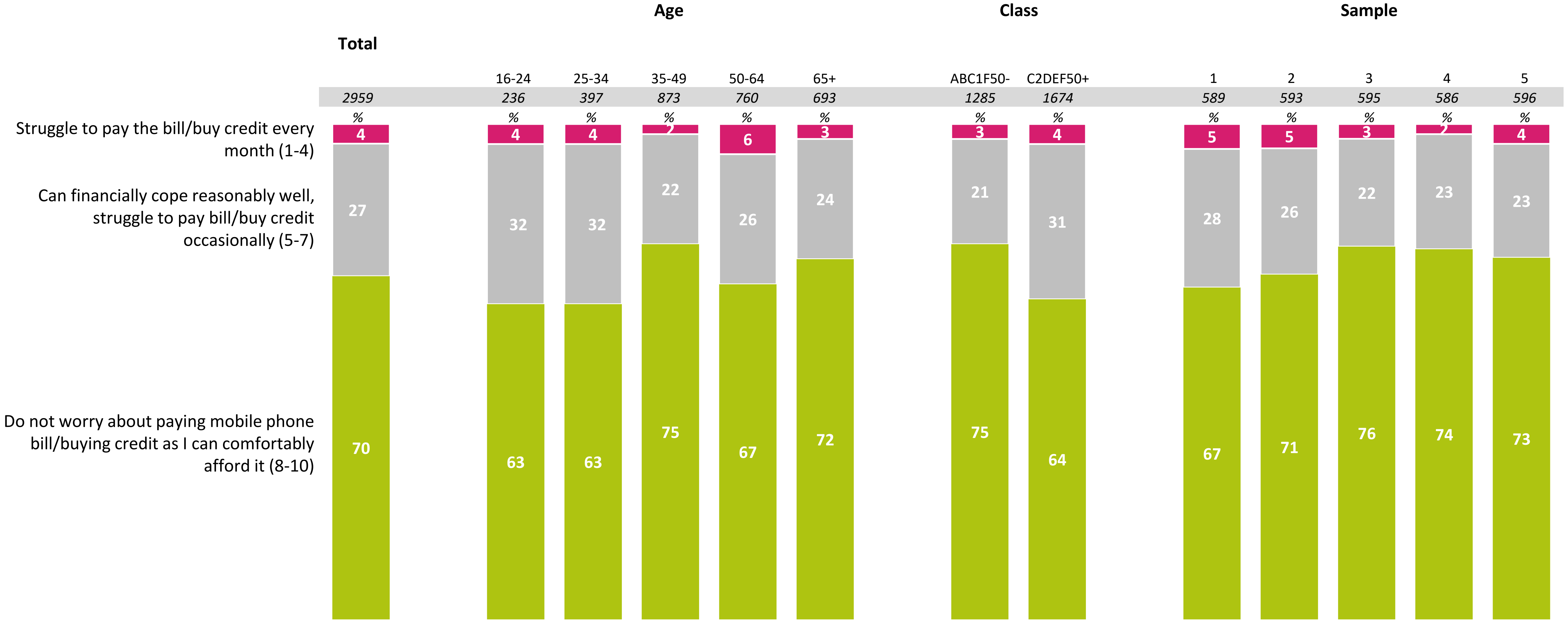
	Total '17	Total '19	Total '22	S1 '17	S1 '19	S1 '22	S2 '17	S2 '19	S2 '22	S3 '17	S3 '19	S3 '22	S4 '17	S4 '19	S4 '22	S5 '17	S5 '19	S5 '22
- ANY Yes Improve	25	20	15	29	23	17	22	14	14	15	14	10	17	13	10	23	10	11
- ANY Yes Worse	10	8	10	8	6	8	8	8	11	17	12	13	12	15	16	14	12	14
Net diff	15	12	5	21	17	9	14	6	3	-2	2	-3	5	-2	-6	9	-2	-3

Improvements in mobile coverage are perceived to have decreased compared to 2019 and 2017, while those noting no changes have increased. Sample 4 has the highest perception of deterioration.

Q.26 Has your mobile phone coverage/signal experience changed over the last year?

Ability to afford mobile phone services x demographics

Base: All with mobile phone: n = 2959



On average, 7 in 10 don't worry about the cost of their mobile phone bill. Those in more urban areas are slightly more likely to struggle with the bill.

**Caution small base*

Q.42 How would you rate your ability to afford your mobile phone communications services?

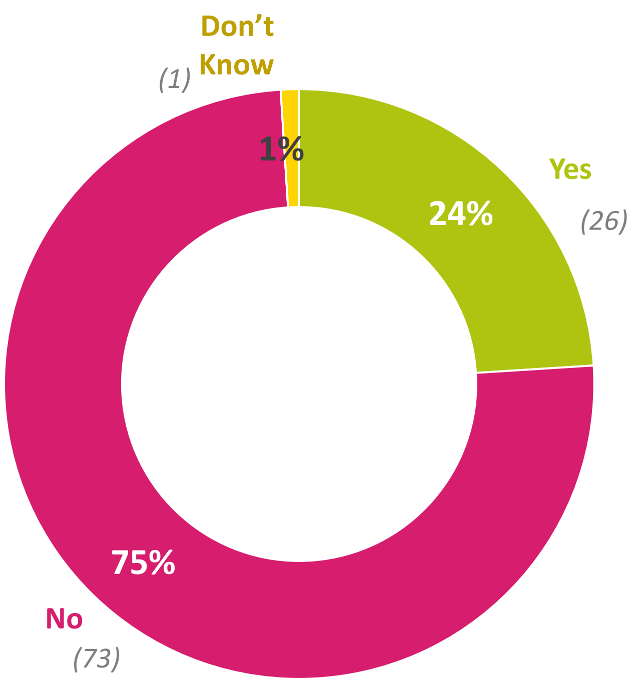
Switching

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

Base: All have mobile : 2959

Changed network provider

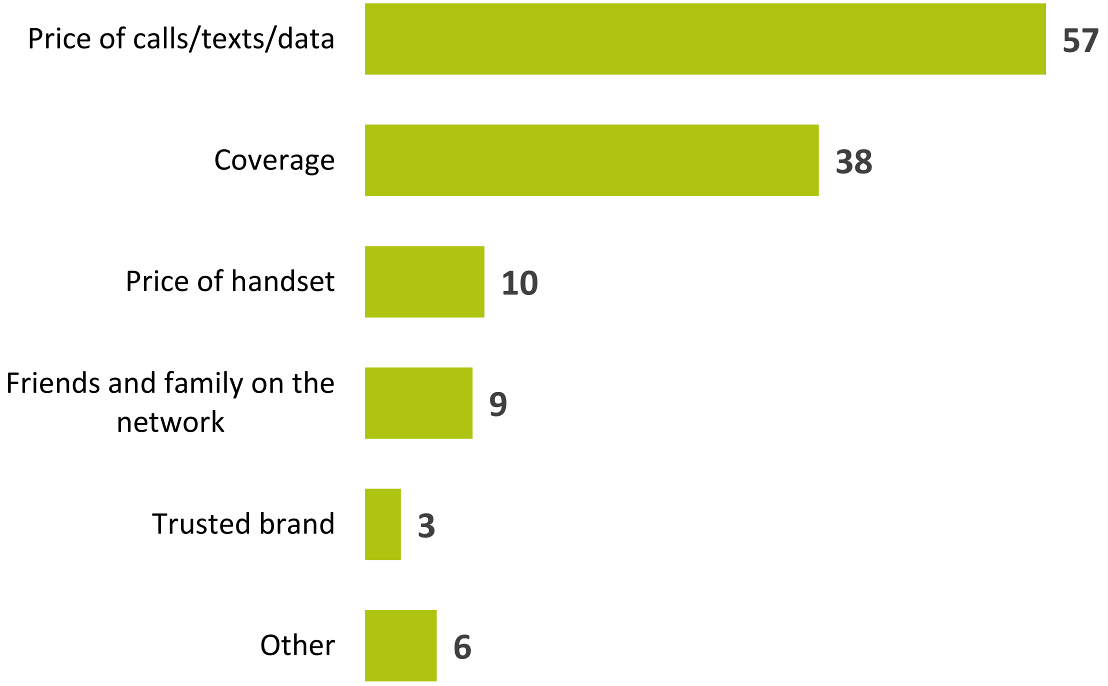
%



Reason that you switched network provider

(Base: Those who switched n = 764)

%



The incidence of changing mobile phone provider remains broadly stable overall, with 1 in 4 having ever switched. The key motivation for switching relates to cost (57%), followed by coverage (38%).

Q.27 Have you ever changed network provider for any reason?

Q.27b [If yes] What was the reason that you switched network provider?

(2019)

Previous mobile phone network provider

Base: All who have ever changed network provider 764

	2019	Total %	Sample 1 (150) %	Sample 2 (165) %	Sample 3 (152) %	Sample 4 (140) %	Sample 5 (157) %
Vodafone	37%	42	40	53	38	51	57
Three (including O2)	28%	28	30	18	33	23	25
eir (includes meteor/eMobile)	23%	15	12	19	21	17	13
Tesco Mobile	4%	4	5	4	3	6	1
GoMo	2%	2	3	-	-	-	0
Lycamobile	1%	1	1	-	-	-	0
Virgin Mobile	N/a	1	2	1	1	-	0
48	N/a	1	2	1	1	-	-
Postfone	N/a	0	0	-	-	-	-
Clear Mobile	2%	0	-	-	1	-	-
Other (please specify)	2%	3	3	3	3	4	1
I Don't Know		1	2	1	-	0	2

Vodafone is the standout provider for those switching, with an increase of 5% switching since 2019. Three remains steady at 28% switching.

Q.28 Who was your previous mobile phone network provider before

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

Base: All have mobile :

Have you ever changed network provider (for whatever reason)?	Total	Age					Sample				
		18-24	25-34	35-49	50-64	65+	Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
	2959	236	397	873	760	693	589	593	595	586	596
	%	%	%	%	%	%	%	%	%	%	%
Yes	24	25	30	23	23	20	23	28	26	24	26
No	75	75	70	75	76	80	76	72	74	75	73
Don't know	1	0	0	2	1	1	1	0	0	1	0

What was the reason that you switched network provider?	Total	18-24	25-34	35-49	50-64	65+	Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
	764	61	117	248	208	130	150	165	152	140	157
	%	%	%	%	%	%	%	%	%	%	%
Price of calls/texts/data	57	68	63	51	50	61	62	49	49	49	33
Coverage	38	33	29	43	42	37	32	39	48	53	64
Price of handset	10	13	8	10	8	12	10	9	10	11	16
Friends and family on the network	9	11	9	8	8	13	12	6	3	9	9
Trusted brand	3	6	4	1	3	-	3	-	3	5	1
Other	6	9	3	7	7	8	6	11	6	3	5

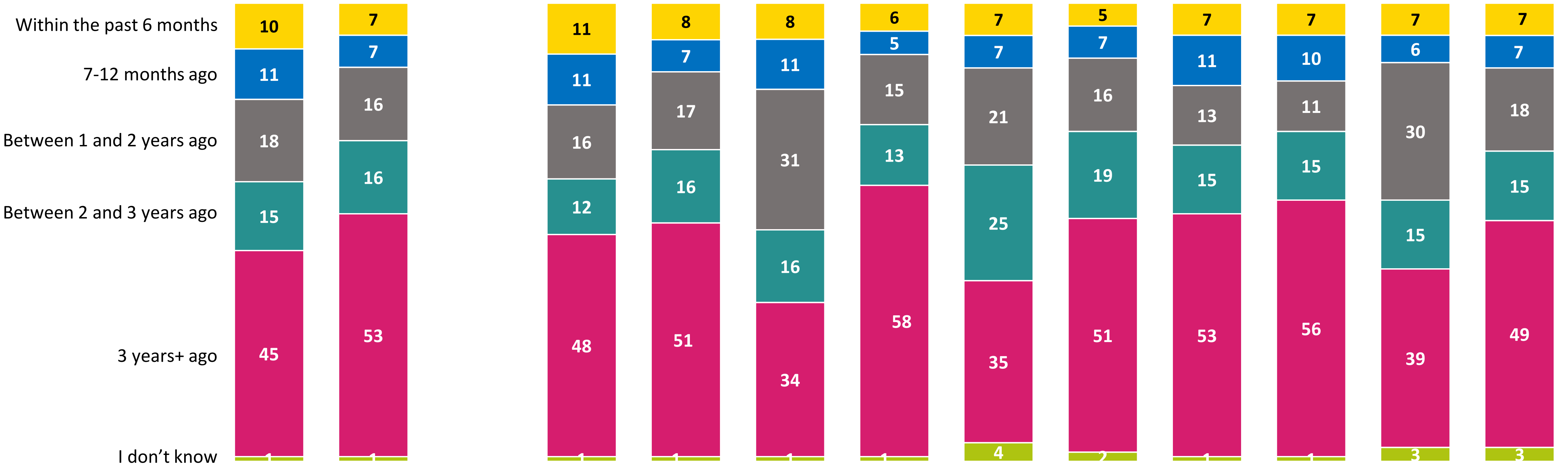
Who was your previous mobile phone network provider before	Total	Age					Sample				
		18-24	25-34	35-49	50-64	65+	Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
	764	61	117	248	208	130	150	165	152	140	157
	%	%	%	%	%	%	%	%	%	%	%
Vodafone	42	26	39	42	45	58	40	53	38	51	57
eir (includes meteor/eMobile)	15	20	16	15	11	14	12	19	21	17	13
Three (including O2)	28	31	24	34	28	18	30	18	33	23	25
Tesco Mobile	4	18	4	1	3	3	5	4	3	6	1
Eir	-	-	-	-	-	-	-	-	-	-	-
Lycamobile	1	-	3	-	-	0	1	-	-	-	0
GoMo	2	-	7	-	-	-	3	-	-	-	0
Virgin Mobile	1	-	-	3	1	3	2	1	1	-	0
Postfone	0	-	-	-	-	2	0	-	-	-	-
48	1	-	2	1	3	-	2	1	1	-	-
Clear Mobile	0	-	1	-	-	-	-	-	1	-	-
Other (please specify)	3	5	0	5	5	1	3	3	3	4	1
I Don’t Know	1	-	4	-	2	1	2	1	-	0	2

Q.27 Have you ever changed network provider for any reason?
Q.27b [If yes] What was the reason that you switched network provider?
Q.28 What was the reason that you switched network provider?

Last time you switched mobile phone operator

Base: All who have ever changed network provider 764

	Total		Sample 1		Sample 2		Sample 3		Sample 4		Sample 5	
	2019	*2022*	*2019*	*2022*	*2019*	*2022*	*2019*	*2022*	*2019*	*2022*	*2019*	*2022*
Unweighted	*669*	*764*	*137*	*150*	*132*	*165*	*142*	*152*	*158*	*140*	*100*	*157*
	%	*%*	*%*	*%*	*%*	*%*	*%*	*%*	*%*	*%*	*%*	*%*
Within last 12 months	21%	14%	22%	15%	19%	12%	14%	11%	18%	17%	13%	14%



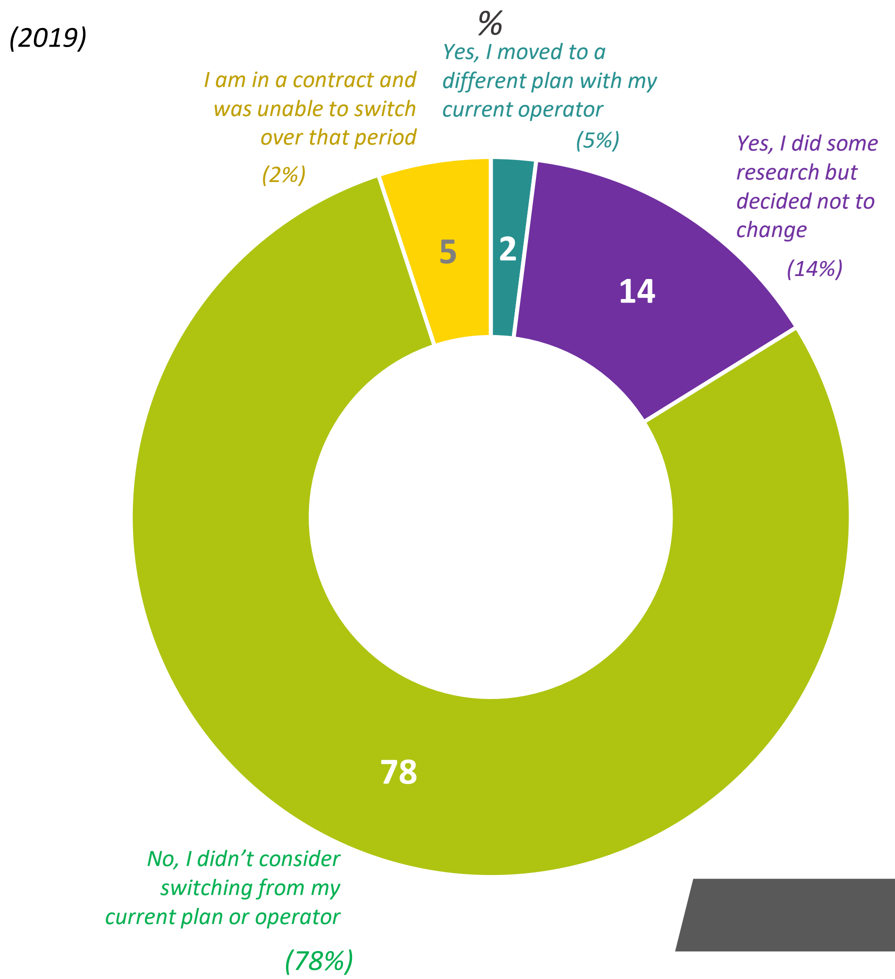
There has been a notable drop in the proportion of those who switched in the last year compared with 2019. This is evident in Samples 1 and 2. It is noteworthy that more than half have not switched in the last 3 years. This has increased across all Sample areas.

Q.29 When was the last time you switched mobile phone operator?

Incidence of non-switchers who considered switching in past 2 years x Samples and Provider

Base: All never switched mobile provider n=2,195

Switching from your current plan or operator



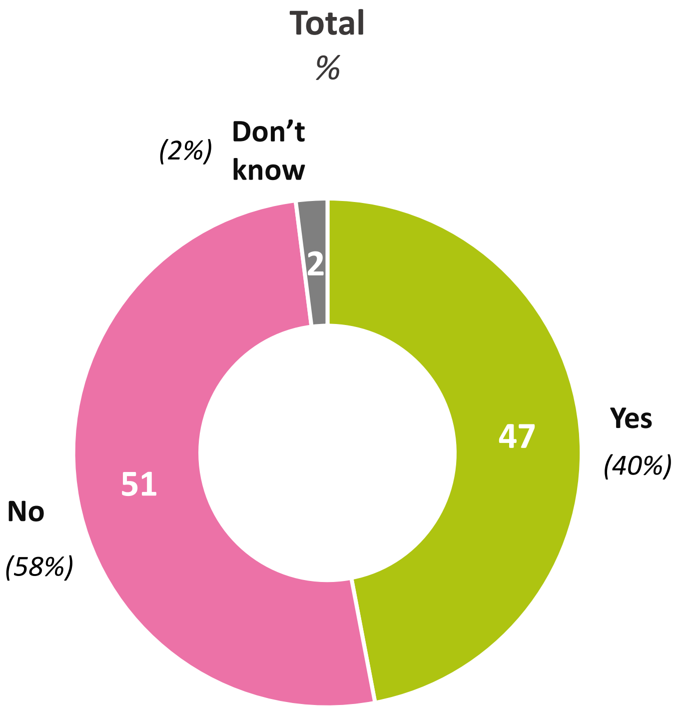
	Sample				
	Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
	439	*428*	*443*	*446*	*439*
	%	*%*	*%*	*%*	*%*
Yes, I moved to a different plan with my current operator	3	2	2	2	2
Yes, I did some research but decided not to change	14	15	16	14	20
No, I didn't consider switching from my current plan or operator	78	79	77	82	74
I am in a contract and was unable to switch over that period	6	5	5	3	4

4 in 5 non-switchers have never considered switching – little variation across sample areas.

Q.30 Within the past two years, have you considered switching from your current plan or operator?

Incidence of keeping mobile phone handset when you switched x Segments

Base: All who have ever changed network provider 669



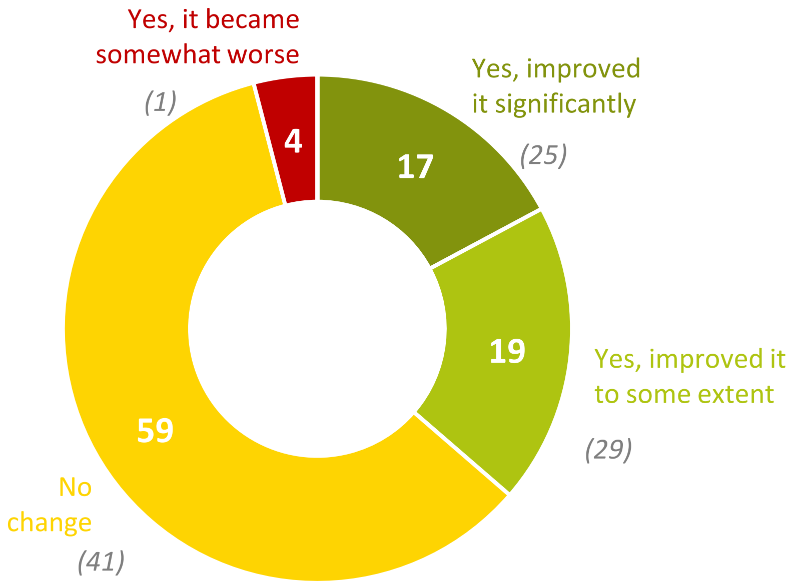
	Sample				
	Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
	150	165	152	140	157
	%	%	%	%	%
Yes	51	44	36	43	40
No	47	54	62	55	58
Don't Know	2	3	2	1	1

Almost half of switchers kept their mobile phone handset when they switched. This is an increase on 2019 numbers. May be an indication of a growing desire to reduce waste.

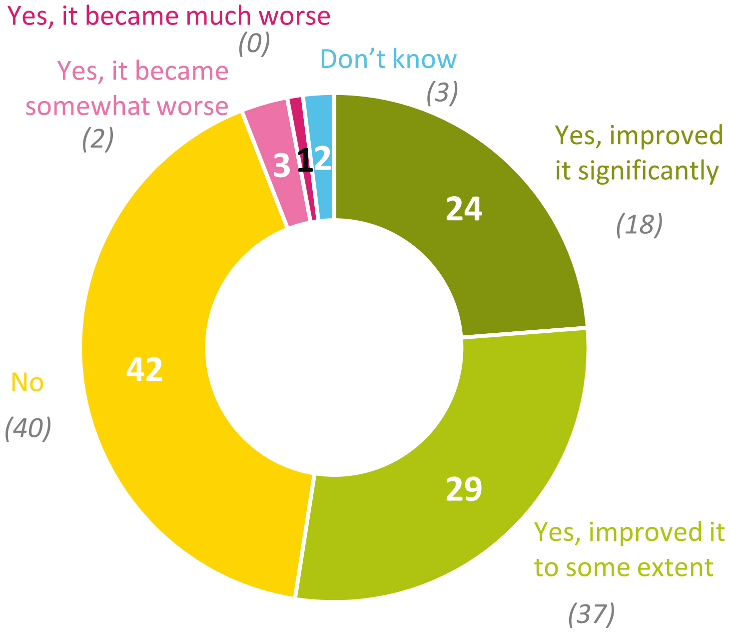
Q.31 Did you keep the mobile phone handset when you switched to

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

Did changing your network provider, but keeping the same mobile phone, improve your mobile coverage experience?
(Base: All Switched but Kept Handset N - 339)
%



Did changing your network provider, and changing your mobile phone in the process, improve your mobile coverage/signal experience?
(Base: All Switched & changed Handset N - 413)
%



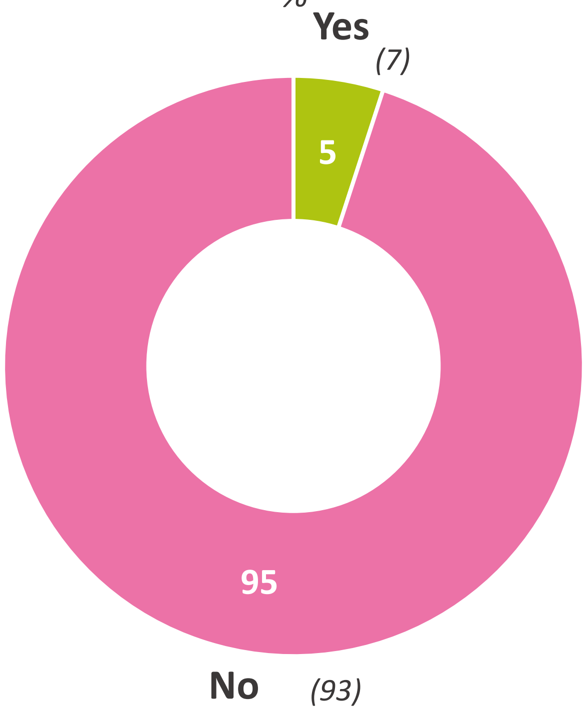
Of those who kept their mobile, 3 in 5 note no change in coverage, with a reduction in those stating it improved coverage from 2019. Those who changed their mobile identified a difference with over half highlighting an improvement in coverage, and an increase in those stating their coverage improved significantly.

(2019)

Q.30a Did changing your network provider, but keeping the same mobile phone, improve your mobile coverage experience?
Q.30b Did changing your network provider, and changing your mobile phone in the process, improve your mobile coverage/signal experience?

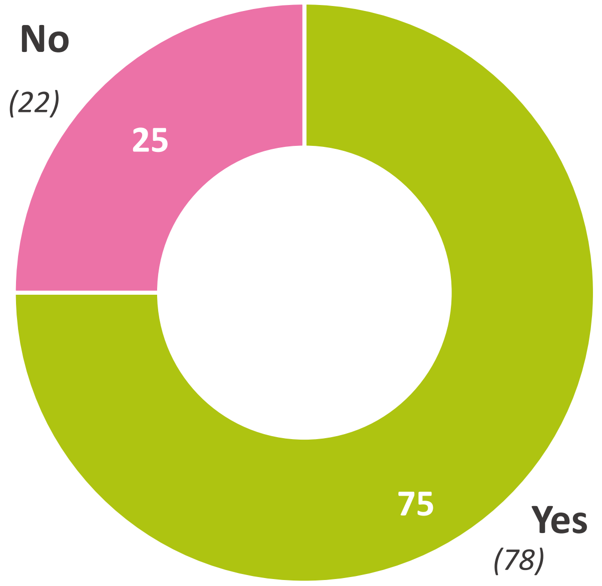
Changing handsets

Changed handset due to mobile phone coverage or signal problems
(Base: All have mobile N - 2959)
%

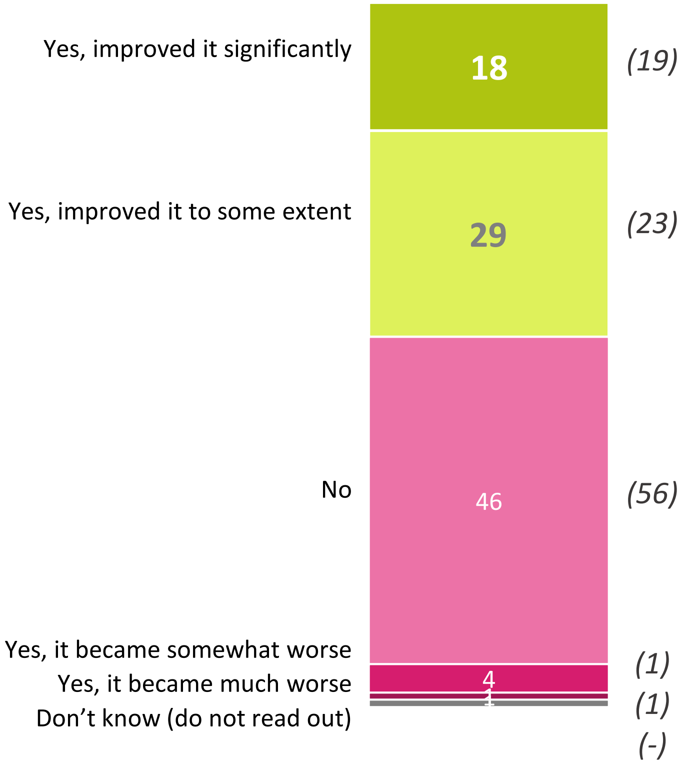


(2019)

Did you stay with the same operator
(Base: All Changed due to coverage issues N - 203)
%



Did changing your handset improve your mobile coverage experience
(Base: Changed due to coverage issues N - 203)
%



Only 5% changed their mobile due to coverage issues. Among those who changed, 3 in 4 stayed with the same operator, indicating little appetite to switch, even in situations of poor coverage. There is a slight increase in those noting an improvement in coverage following a change in mobile with just under half identifying some level of improvement.

Q.30c Have you ever changed handset due to mobile phone coverage or signal problems?
Q.30d Did you stay with the same operator?
Q.30e Did changing your handset improve your mobile coverage experience?

Changing handset due to coverage/signal issues

Base: All with mobile n – 2959; All Changed due to coverage issues N - 203

Q.30c. Have you ever changed handset due to mobile phone coverage or signal problems?	Total	Sample				
		Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
	2959	*589*	*593*	*595*	*586*	*596*
	%	*%*	*%*	*%*	*%*	*%*
Yes	5	4	6	6	10	9
No	95	96	94	94	90	91

Q.30d. Did you stay with the same operator?	Total	Sample				
		Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
	203	*26*	*34*	*38*	*54*	*51*
	%	*%*	*%*	*%*	*%*	*%*
Yes	75	78	74	71	73	67
No	25	22	26	29	27	33

Those in Sample 4 (more rural) are more likely to have changed handset due to coverage issues.

Q.30c. Have you ever changed handset due to mobile phone coverage or signal problems?
Q.30d. If yes to Q30c. Did you stay with the same operator?

Changing your handset improve your mobile coverage experience

Base: All adults who changed due to coverage issues N - 202

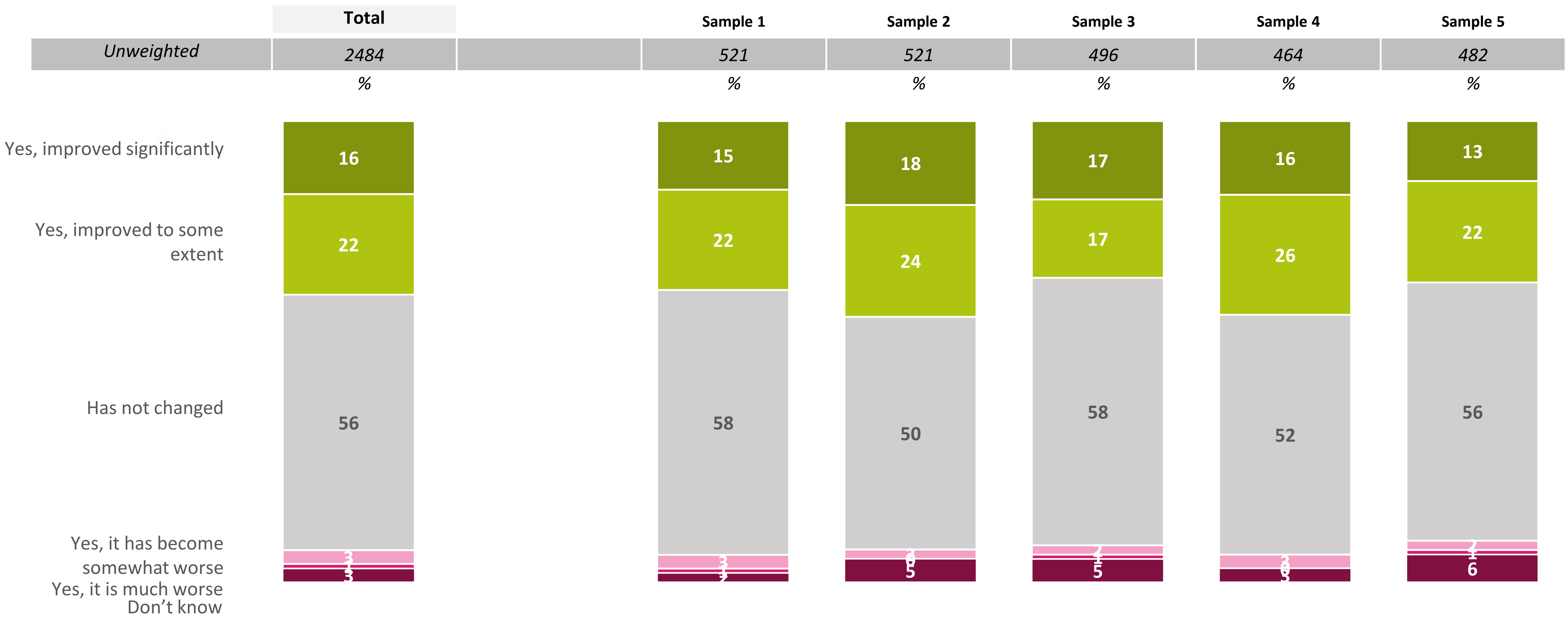
	Total	Gender		Age					Social Class		Sample				
		Male	*Female*	*18-24*	*25-34*	*35-49*	*50-64*	*65+*	*ABC1F50+*	*C2DEF50-*	*Sample 1*	*Sample 2*	*Sample 3*	*Sample 4*	*Sample 5*
	202	100	102	15	35	59	60	33	97	105	26	34	38	53	51
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Yes, improved it significantly	18	11	25	1	7	28	27	11	24	10	16	27	18	17	13
Yes, improved it to some extent	29	30	29	19	39	32	21	27	39	17	33	20	16	38	33
No	46	55	37	81	52	27	46	54	32	65	47	41	56	38	45
Yes, it became somewhat worse	4	2	6	-	-	11	3	0	4	4	4	5	3	4	3
Yes, it became much worse	1	1	2	-	-	1	3	4	0	3	-	3	4	2	7
Don’t know (do not read out)	1	1	1	-	2	-	-	4	2	-	-	3	3	-	-
NET (Improved)	***47***	***41***	***54***	***19***	***46***	***60***	***48***	***37***	***63***	***27***	***49***	***47***	***33***	***56***	***45***
NET (Worse)	***5***	***3***	***8***	***-***	***-***	***13***	***6***	***4***	***4***	***7***	***4***	***8***	***7***	***6***	***10***

Q.30e Did changing your handset improve your mobile coverage experience?

Incidence of WiFi improving internet access on mobile

Base: All adults who have broadband N – 2,484

2017 - ANY Yes Improve	53
2019 - ANY Yes Improve	42
2022 – ANY Yes Improve	38

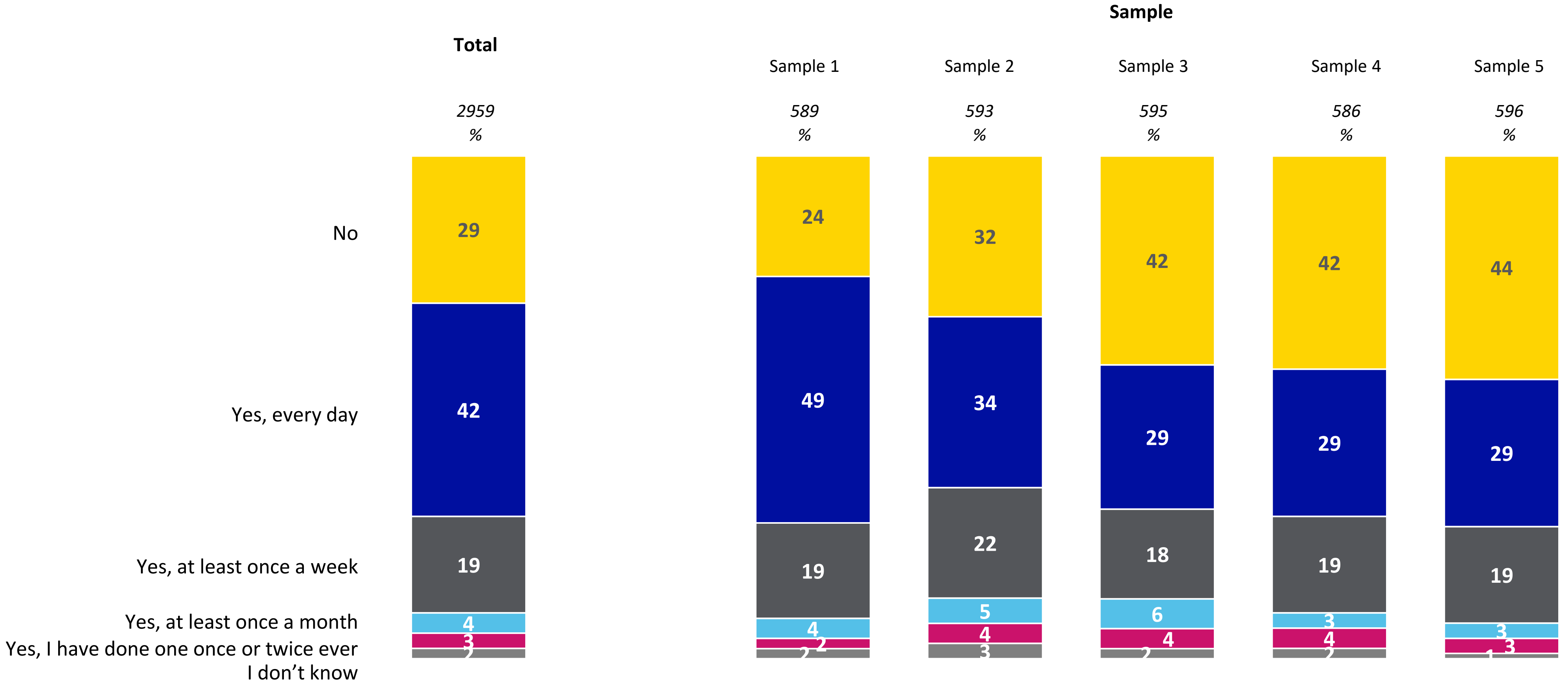


Just under 2 in 5 indicate that connecting to WiFi improves internet access (however this has been declining).

Q.34 Does connecting to the Wifi service in your home improve your internet access experience on your handset?

Incidence of ever making calls over Wi-fi x Samples/ Mobile Network

Base: All who have mobile 2,959



	Total		Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
2022 ANY YES	69		74	65	56	56	54
2019 ANY YES	46		49	41	45	40	30
2019 % at least weekly	35%		39%	30%	34%	27%	21%

There has been a significant increase in the use of WiFi to make calls, from 46% in 2019 to 69% in 2022. This increase is most notable in the urban areas with only 1 in 4 not making calls through WiFi in Sample 1 for example. This highlights more extensive usage where strong BB connections are most accessible.

Q.35 Do you ever make calls over Wi-Fi?

Incidence of Wi-Fi improving voice call experience x samples

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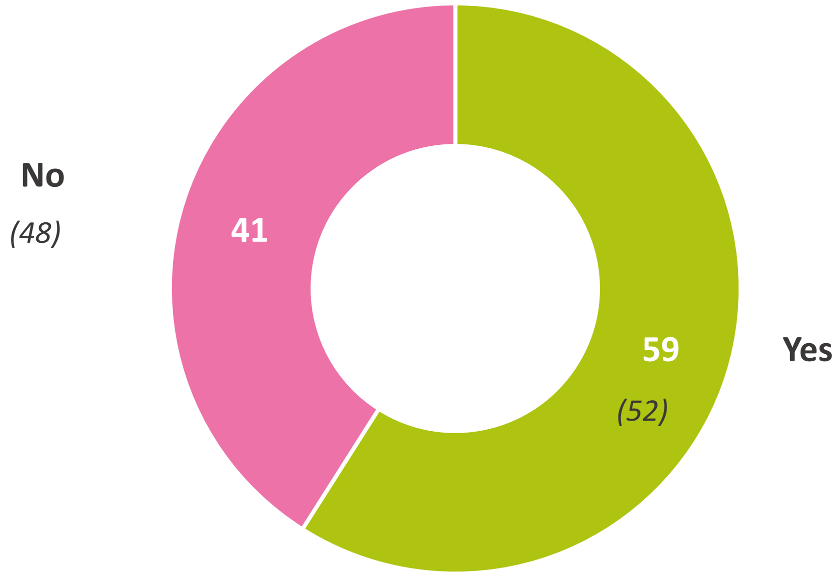
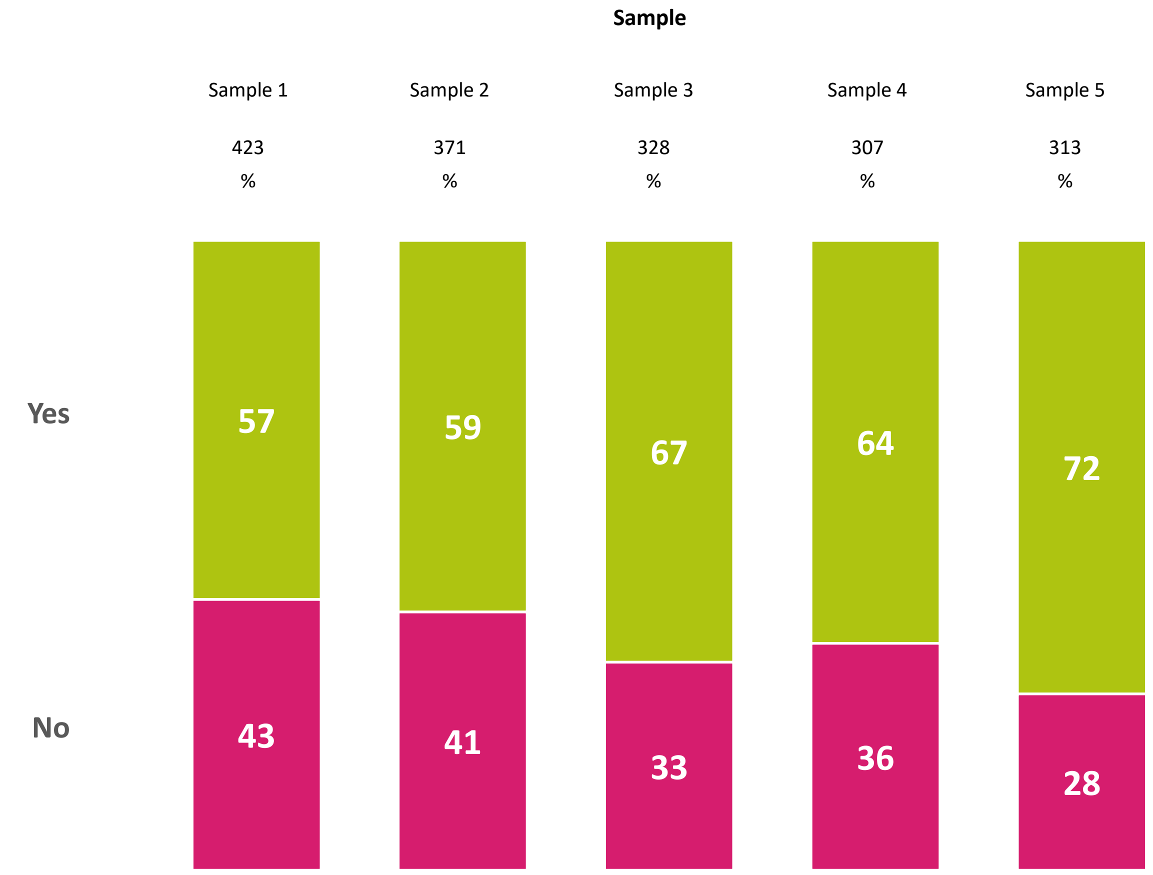
Commission for Communications Regulation

Base: All who make calls over Wi-Fi

Improve your voice call experience
%





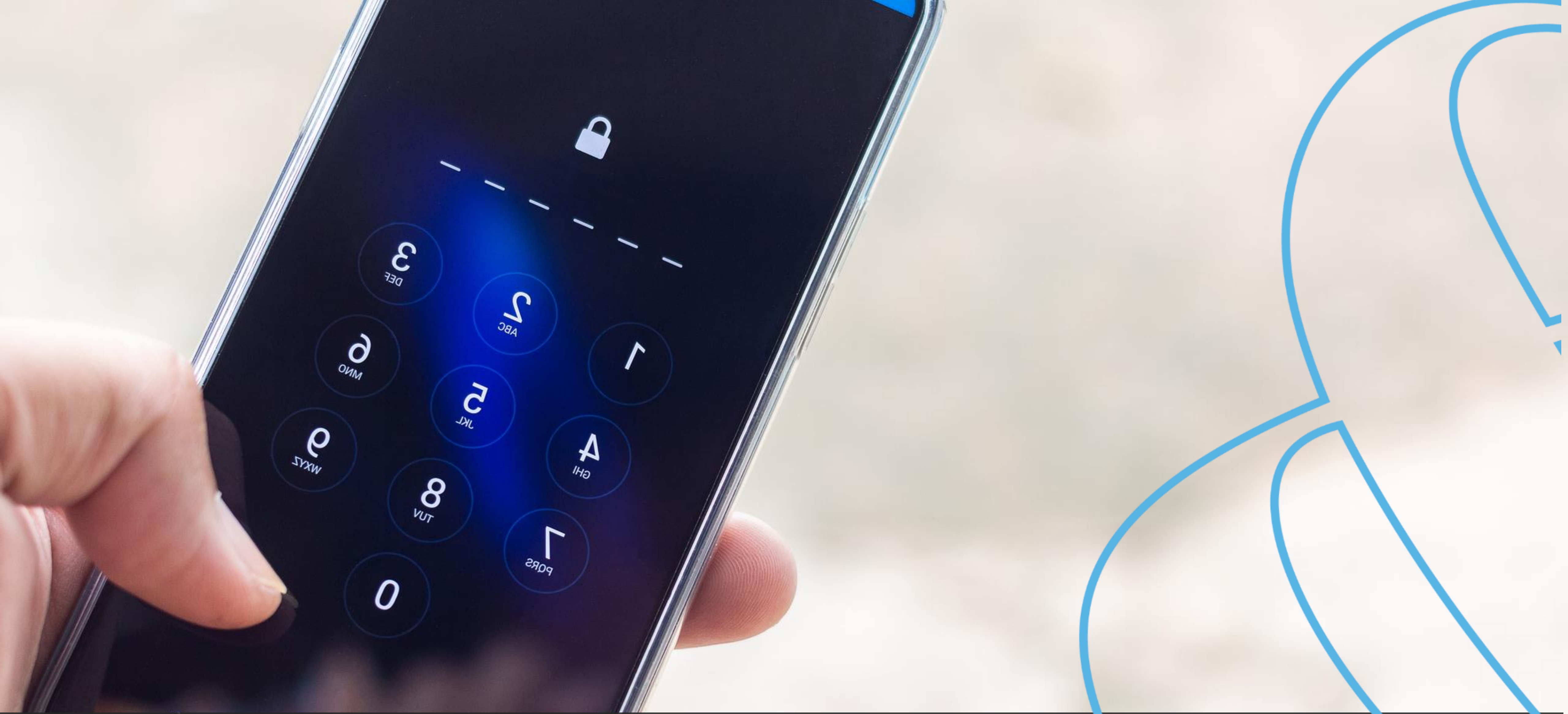
		Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
2019	Yes	49	52	61	58	60
	No	51	48	39	42	40

3 in 5 note an improvement in call experience when using WiFi – an increase of 7% since 2019. This is evident in the more rural Sample areas and the improvement in rural areas is noteworthy when compared to 2019.

(2019)

****Question added 2019*

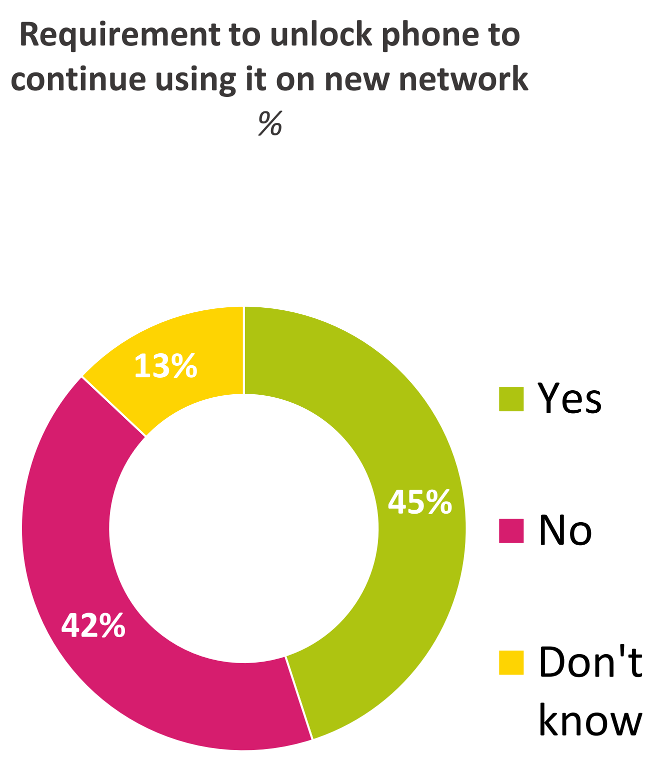
Q.36 Does doing so improve your voice call experience?



Handset Locking

Unlocking the mobile phone

Base: All who switched and kept handset – n = 339



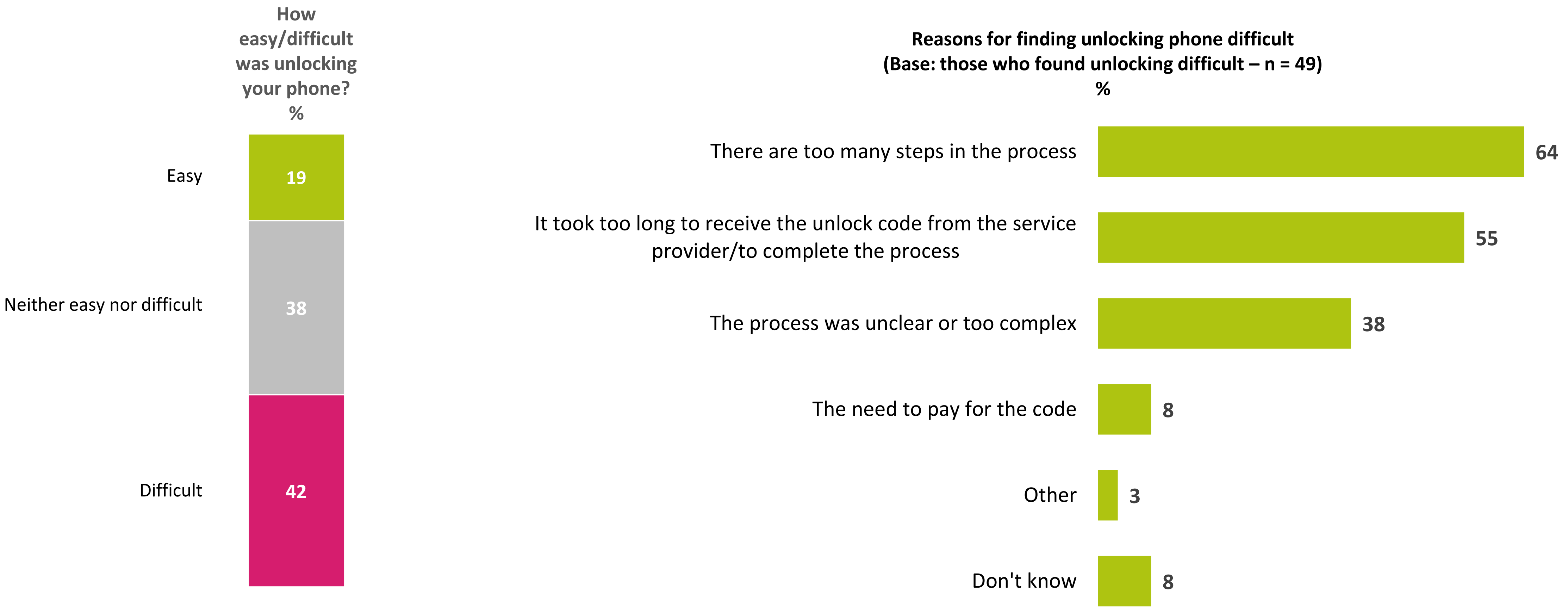
Of those who switched but kept their handset, 45% needed to unlock their phone.

***Question added 2022

Q.37 Did you require a code to unlock your mobile so that you could continue using it on the new network?

Process of unlocking your phone

Base: All who required a code for unlocking phone n = 122



2 in 5 feel the process of unlocking a phone is difficult, with only 1 in 5 viewing this as an easy process. Of those who view it as a difficult process, 2 in 3 state that there are too many steps in the process, while over half noted a delay in receiving their unlock codes.

Q.38 How did you find the process of unlocking your phone (including requesting the code, receiving and using it and any additional steps needed)?

Q.39 What was difficult about the experience of unlocking your phone?

What was difficult about the experience of unlocking the phone?

Base: All who have mobile 122

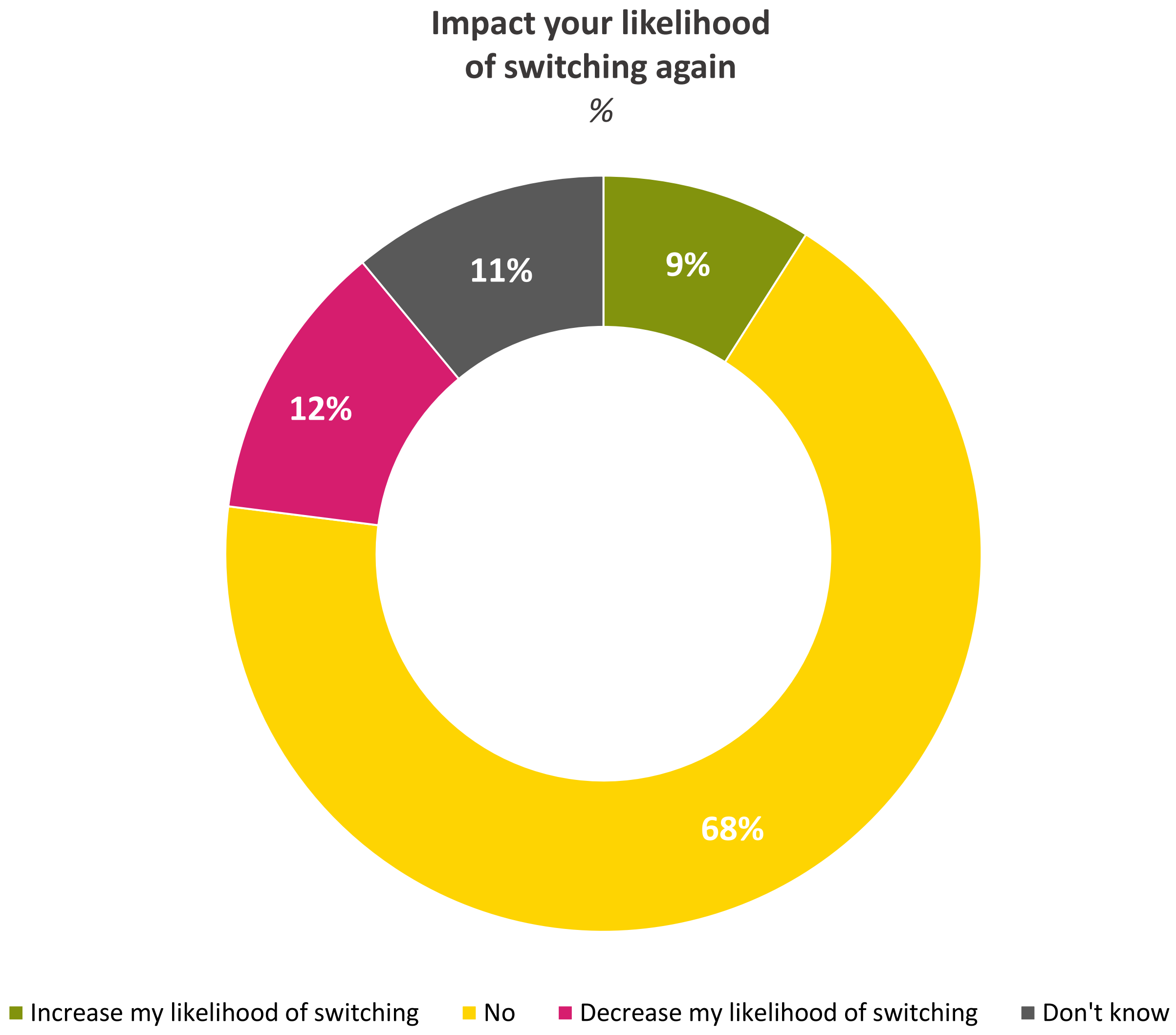
	Total	Age					Social Class		Sample				
		18-24	25-34	35-49	50-64	65+	ABC1F50+	C2DEF50-	Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
UNWTD	*122*	*12*	*14*	*45*	*29*	*22*	*59*	*63*	*32*	*32*	*22*	*18*	*18*
	%	%	%	%	%	%	%	%	%	%	%	%	%
There are too many steps in the process	64	90	90	84	0	43	57	78	77	41	6	42	5
It took too long to receive the unlock code from the service provider/to complete the process	55	45	92	53	56	54	68	26	53	59	59	65	47
The process was unclear or too complex	38	45	12	46	28	40	48	16	41	31	18	57	-
The need to pay for the code	8	-	78	-	-	-	11	-	10	-	-	-	-
Other (please specify)	3	5	-	1	5	2	3	4	4	-	-	-	33
Don't know	8	3	8	4	16	34	8	9	-	24	41	35	20

Q.39 What was difficult about the experience of unlocking your phone?

****Question added 2022*

Process of unlocking your mobile impact your likelihood of switching again

Base: All who switched and kept handset – n = 339

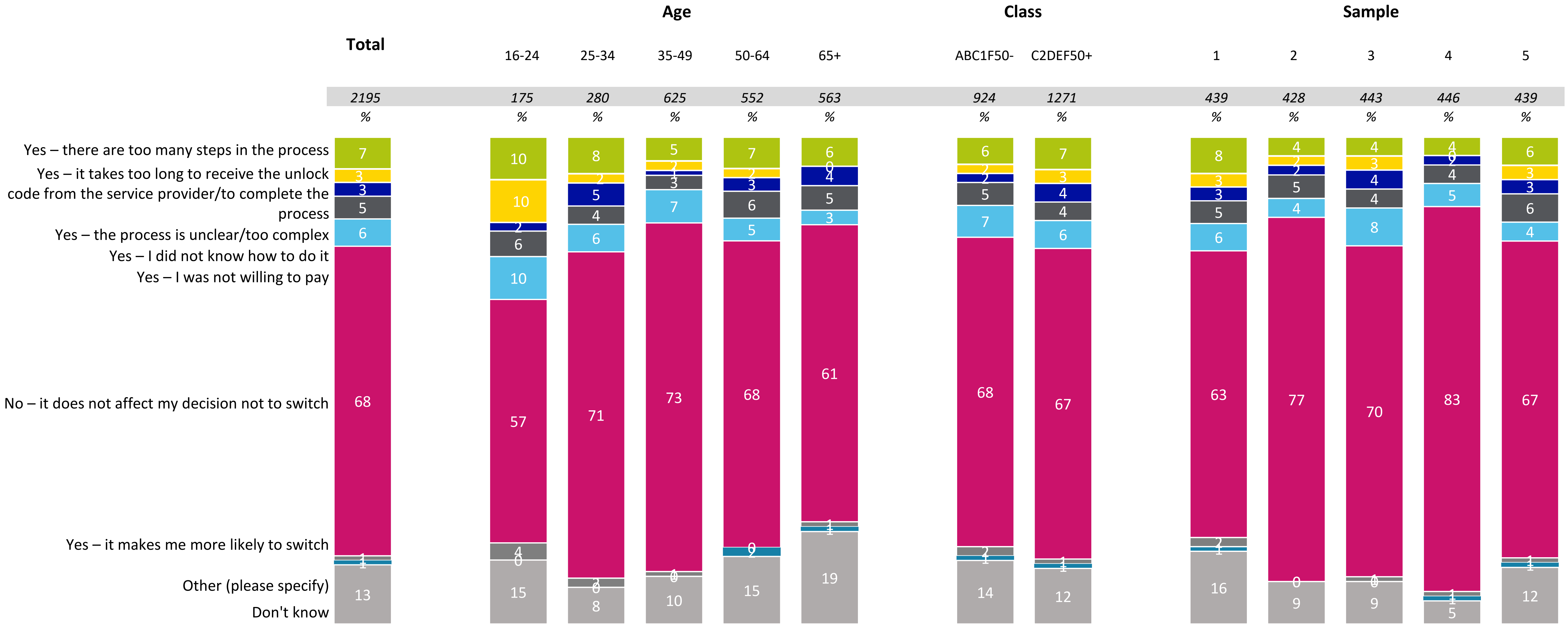


For the vast majority, their experience of unlocking their handset has not had a major impact on their willingness to switch with over 2 in 3 reporting it has no impact on their decision.

Q.40 Would the process of unlocking your mobile impact your likelihood of switching again?

Need to unlock your mobile device a factor in your decision not to switch

Base: All not switching: n = 2195



	Total		16-24	25-34	35-49	50-64	65+		ABC1F50-	C2DEF50+		1	2	3	4	5
Any Yes	20		32	21	18	17	18		19	21		22	14	21	13	20

1 in 5 indicated that having to unlock their mobile is a factor in deciding not to switch, with those under 25 much more likely to highlight this

**Caution small base*

Q.41 Is the need to unlock your mobile device a factor in your decision not to switch?

Key highlights

Key Highlights

Ownership and Spend

- Almost **universal ownership of mobile phones**, with 13% of people having a handset paid for by their employer. There has been a major shift in payment method with 67% now on bill pay, compared to 40% last wave.
- Of those with a mobile phone, **91%** now have **smart phones** compared to **84% in 2019.** 77% of the smartphone market is served by Apple and Samsung.
- **Landline ownership has dropped significantly from** 52% in 2019 to 39% in 2022, with a tendency to greater landline ownership in Munster, amongst farmers and across the older age cohorts.
- Key reasons for decreases in landline ownership is displacement by the mobile phone, likely due to the growth in smartphones and accessible plans, while 80% noted they simply don’t need a landline, opting to use mobiles instead.
- Key reason for retaining the landline is to support the broadband service/connection to Wi-Fi.
- **One third of customers have a prepay phone, and this is correlated with age** (younger age cohorts have higher proportions of prepay).
- Average monthly Bill pay spend is **€37.95,** a 10% decrease on 2019 and is higher among 25-34 age category, while over 55s have the lowest average spend. Average monthly Prepay spend is **€20.43** (very little change since 2019**)**.

Switching

- The vast **majority** of consumers have been **with their mobile provider for 3+ years (82%).**
- **Price** is a secondary consideration when choosing networks - **family and friends** on a network and **supplier reputation** are viewed as more important. In rural areas good **coverage** comes before price as a motivator for choosing a particular supplier.
- Incidence of ever having switched mobile phone provider has reduced slightly to 24%, marginally lower than 2019, while ***14% of those who switched did so within the last 12 months*** – a decrease of -7%pts since 2021.
- **78% of non-switchers have not considered switching in the last 2 years.**

Key Highlights

Usage Patterns

- **Almost 9 in 10 now use data (3G, 4G, 5G)** on their mobile – particularly in the <50 age cohorts. More rural areas 4 and 5 (rural) under-index in usage patterns generally, though this is especially the case with data. This is likely to be associated with perceptions of broadband quality.
- **Everyday usage of data across various locations** (in-home, work/college location, etc.) has remained steady or reduced from 2019 levels, particularly in relation to another location outside of the home (42% 2019 vs 36% 2022), possibly due to the growing number of employees with options to work from home.
- There has been an increase in length of time mobile users spend on internet activity, particularly in **streaming music and internet-based applications for voice calls** (more than **doubling** since 2019). Customers in more rural areas, and older age cohorts **under index on data usage.**
- Customers in urban areas and those tending towards the younger age categories display higher usage in terms of average number of minutes per day, with noteworthy increases in average time spent on social media, streaming and internet-based activity.
- **Incidence of using voice/text** at various locations (e.g. work/college) remains relatively **stable** with 2019. There is some decrease in regard to usage while in another location.
- Unlike in 2019, rural based mobile users do not show significantly lower everyday usage of mobile for voice calls & text across the various areas. Those over 55 years of age, however, do show much less usage compared to other age cohorts.

Customer Satisfaction and Experience of Service

- Overall **satisfaction with mobile coverage at home is 75**% (scoring 7 or more out of 10) while Satisfaction with mobile coverage in 'other areas you visit/travel to'. Is slightly higher, at 81%. The highest levels of satisfaction occur in urban areas.
- In the last month, **37% have experienced loss of signal** when using call / text functions on mobile networks, while 32% have experienced loss of signal when using data. Those in very rural areas note higher incidences of disruptions.
- Over **50% experience daily issues in relation to voice calls/texts in their home** or a specific part of their home. Those in rural areas are impacted more, with 62% of rural dwellers experiencing daily issues in a part of their home. The issues relate primarily to Dropped calls and unable to receive a call or a text.
- Notwithstanding the prevailing economic climate, **70% of customers do not worry about paying their phone bill** / buying credit because they can comfortably afford it. However, the biggest users of mobile phone services (those under 35) are more likely to struggle to pay for the service occasionally.

Key Highlights

Customer Experience of Service

- Amongst those citing a loss of signal when attempting to use a service on their phone, the incidence of outages lasting for a longer period of time is reduced, compared with prior years but there has been a **marked increase in those noting intermittent outages**.
- Interestingly, almost **half of switchers kept their mobile phone handset** when they switched. Of those who kept their mobile, 3 in 5 note no change in coverage, with a reduction in those stating it improved coverage from 2019. Those who changed their mobile identified a notable difference with over half identifying an improvement in coverage, and an increase in those stating their coverage improved significantly.
- There has been a significant increase in the use of Wi-Fi to make calls, from 46% in 2019 to 69% in 2022, most notably in urban areas, which highlights more extensive usage where strong BB connections are most accessible.