



An Coimisiún um
Rialáil Cumarsáide
Commission for
Communications Regulation

Mobile Consumer Experience Survey

ComReg 17/100a

Summer 2017



PREPARED BY:

Behaviour & Attitudes and The Research
Perspective on behalf of ComReg

Background

- ❑ In April 2017 ComReg commissioned Behaviour & Attitudes and The Research Perspective to undertake fieldwork to help ComReg assess and understand Irish mobile phone users' experience with their mobile network and handset.
- ❑ This study is one component of a wider research project being undertaken by ComReg regarding the experience of mobile phone users in Ireland.
- ❑ The focus on this study is on consumers' self-reported experiences of their mobile network and handset.
- ❑ This work also relates to the work of the Mobile Phone and Broadband Taskforce, led by the Department of Communications, Climate Action and the Environment.
- ❑ Fieldwork for this study was conducted during May-June 2017.

Topline Highlights



Highlights

Use of Mobile Phone Services in Ireland:

- ▶ **98% of the Irish population now own a mobile phone**, with the incidence of ownership slightly lower in rural areas, and amongst those over the age of 65. The most common reason for not owning a mobile phone is access to a landline telephone. (Slides 15-16)
- ▶ **Smartphone ownership is highest in urban areas and amongst younger respondents**. Those over the age of 65, and those living in the most rural areas are most likely to have older handsets (>5 years). (Slides 32-33)
- ▶ **Just over half of all mobile phone consumers are on prepay plans**. However, prepay is much more common among certain populations, in particular those living more rural areas, those aged between 16 and 24 and those over the age of 65. (Slides 17-18)
- ▶ **The average monthly spend on a prepay mobile phone plans is €20.58. By contrast, those on bill pay plans spend almost double this at €40.28.** (Slides 19-20)
- ▶ **The price of calls, texts and data** is identified as the most important issue when choosing a mobile phone provider in urban areas, whereas in the more rural areas **network coverage** is the most important consideration. (Slide 30)
- ▶ While **voice and text are still the most popular services** on mobile phones, **75% of people also use data**. However, the take up of data services is lower in rural areas and amongst older respondents. This is reflected in the average time spent on internet based activities in urban and rural areas; those living in urban areas spent more minutes every day browsing the internet, streaming music and TV apps than those in rural areas. Similarly, the number of text messages sent per day does not vary significantly between urban and rural respondents, but the use of messaging applications such as WhatsApp is much more prevalent in urban areas. (Slides 35-36, 39-41)

Highlights

- ▶ **Half of all households have a home/landline telephone**, but this figure goes up to 74% amongst the population aged over 65. The most common reason for having both a home phone and a mobile phone is the perception that calls are cheaper from a landline. A much higher percentage of those living in rural areas indicated that they maintained both a mobile phone and a landline because the quality of their landline phone is superior. (Slides 23-24)
- ▶ **69% of respondents who have a mobile phone indicated they used their mobile phone on a daily basis at home**, compared to 38% who used it daily in another location (work/school/recreation) and 15% who used it daily while travelling in a car or bus. **Similarly, the home was also the most frequent location for using mobile data (45% on a daily basis)**. (Slides 42, 45)
- ▶ **84% of respondents use their phone for voice calls and text phone at least five days a week inside the home**. The proportion of those using their phone for data related activities at least five times a week is much smaller at just 57%. (Slides 43, 46)
- ▶ **Broadband is significantly more prevalent in urban areas**. The most common means of accessing broadband is via a cable TV network in very urban areas. However, this is very rarely used outside of big cities. Supplying broadband via a traditional landline phone is common in all regions, but broadband by satellite network and mobile broadband by a mobile network provider is particularly used in rural areas. (Slide 26)

Highlights

Mobile Consumer Experience:

- ▶ 29% of respondents with a mobile phone had experienced service issues for calls or SMS throughout their home, with greater numbers of rural respondents indicated they experienced service issues compared to urban users. (Slides 51-52)
- ▶ Of those respondents who indicated they had experienced a service issues for calls or SMS, 43% of these respondents living in urban areas (Sample 1) indicated they experienced these service issues throughout their home on a daily basis, compared to 63% of these respondents who live in remote areas (Sample 5). (Slide 54)
- ▶ 13% of respondents with a mobile phone living in urban areas indicated they experienced service issues for calls or SMS while travelling in a car or bus, compared to 42% of respondents living in remote areas. (Slide 52)
- ▶ Deterioration in the reception quality of the call while at home (indoors) was the most frequently cited service issue experienced by respondents who had a service issue in the last month (51% of respondents who had a service issue in the last month). (Slide 57)
- ▶ Most respondents were broadly satisfied with their mobile network operators coverage where they live (i.e. in their homes). 77% of respondents indicated they were satisfied or very satisfied with their operators coverage at home, compared to 11% who were dissatisfied or very dissatisfied. (Slide 62)
- ▶ 25% of respondents indicated that their coverage experience had improved in the last year, compared to 10% of respondents who indicated it had worsened. 63% of respondents indicated their experience had not changed in the last year. (Slide 64)
- ▶ Of those respondents who had changed/upgraded their mobile phone due to a service issue, 55% indicated that their coverage experience improved, compared to 4% who indicated it has worsened. (Slide 67)
- ▶ Similarly for those respondents who switched mobile network operator (but kept the same mobile phone), 48% of these respondents experienced improved mobile coverage, compared to 3% who indicated it has worsened. In addition, 50% of respondents who switched mobile network operator and switched/upgraded their mobile at the same time indicated they experienced better mobile coverage. (Slides 70-71)
- ▶ Finally, 44% of respondents who used their smartphone for accessing the internet found that using a Wifi service improved their handset experience. (Slide 72)

Highlights

Willingness to Pay

- ▶ **Overall, the willingness to pay an additional amount per month to receive a reliable mobile phone service is low.** 12% of those surveyed indicated they would be willing to pay an additional amount each month to receive a reliable mobile phone service, compared to 71% who said they were not prepared to pay an extra amount. (Slide 74)
- ▶ Of those respondents who are willing to pay an additional amount per month, **respondents to the survey were willing to pay €2.17 a month for a reliable voice and text quality service in their homes, and an additional €1.98 a month for a reliable data service in their homes.** They would also be willing to pay for reliable coverage elsewhere. (Slides 77, 79)

Responses of Consumers and awareness of ComReg:

- ▶ Almost three quarters of survey respondents have been with their supplier for 3+ years, and only **24% of consumers have ever switched** mobile provider. Younger survey respondents are the most likely cohort to switch. (Slide 68)
- ▶ About 12% of survey respondents have complained to their network provider about the quality of mobile phone signal/coverage. The most common types of complaints related to dropped calls and issues with data service at home. (Slide 81)
- ▶ Over one third of survey respondents had heard of ComReg with 4% of these having made a complaint to ComReg in relation to coverage or quality of service. (Slides 83-85)



Methodology & Sample Profile

Research Methodology

- Survey data collection methodology was 'face to face' interviewing. All interviewing was administered at the respondents own home – 2,826 respondents were interviewed in total.
- The total sample was split across five distinct segments, based on population density, with a higher proportion of interviews being conducted in areas of lower population density.
- Within each segment interlocking quotas were applied across gender and age to ensure that the findings are fully representative of Irish adults aged 15+ living in each area.
- A corrective weight has been applied to the data within each segment to ensure that it is fully representative of all adults. The total sample of 2,826 has also been amalgamated and weighted back in line with the total population aged 15+.
- Margin of error on a sample of 2,826 is +/-2%pts. For smaller sub-samples the margin will be greater.

A note on reading the charts



01

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 15+ who fall into that category.

02

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.

03

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.

04

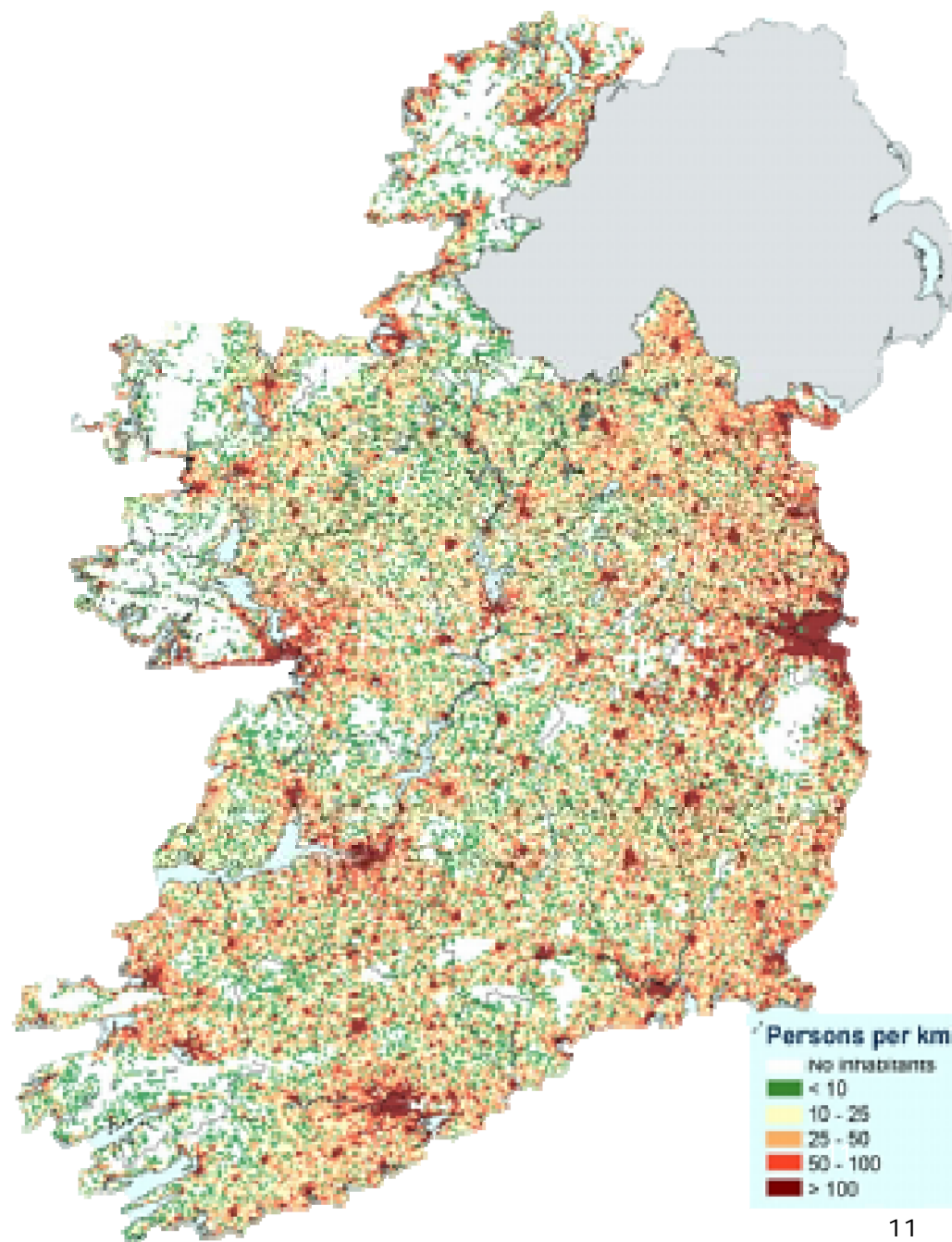
In some cases percentages will not add up to 100%, this will be due to multi-coded responses where a respondent selected more than one response or due to rounding if +/- 1% of 100%.

05

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

Profile of Total Sample

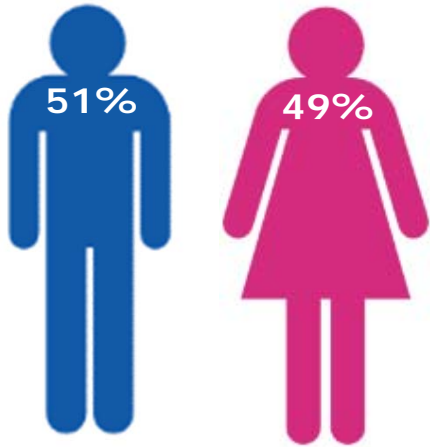
	Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
Sample Size	505	504	606	708	503
Population Density	>100 per Sq. Km	<100 and >50 per Sq. Km	<50 and >25 per Sq. Km	<25 and >10 per Sq. Km	<10 per Sq. Km
Total Population (2011)	2,899,576	507,773	650,521	475,702	54,680
Sq. Km	4,839	7,412	18,940	27,362	9,912
Number of Sampling Points	42	42	50	59	42



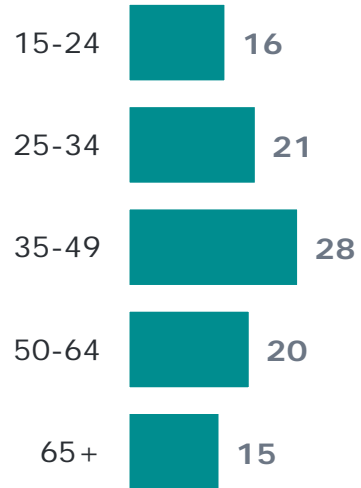
Profile of Total Sample

Base: All Adults aged 15+

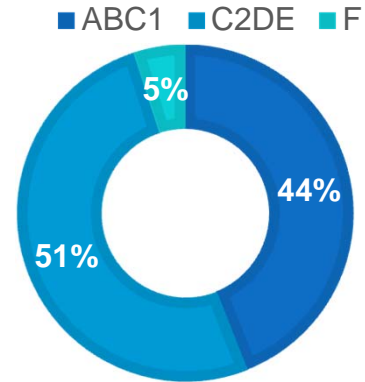
Gender



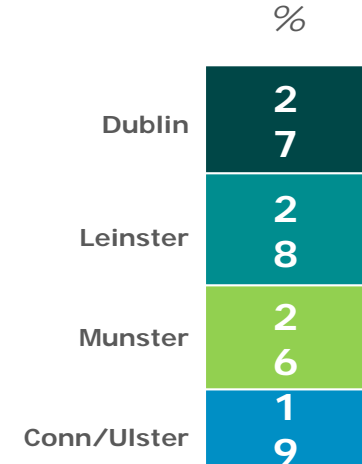
Age



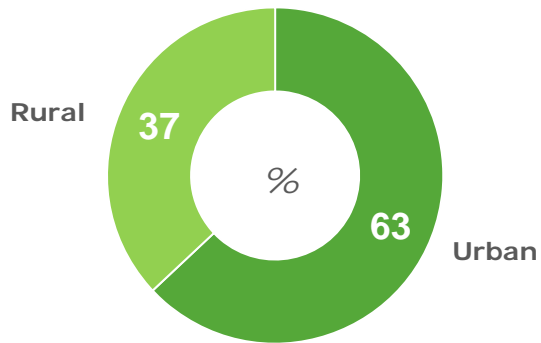
Social Class



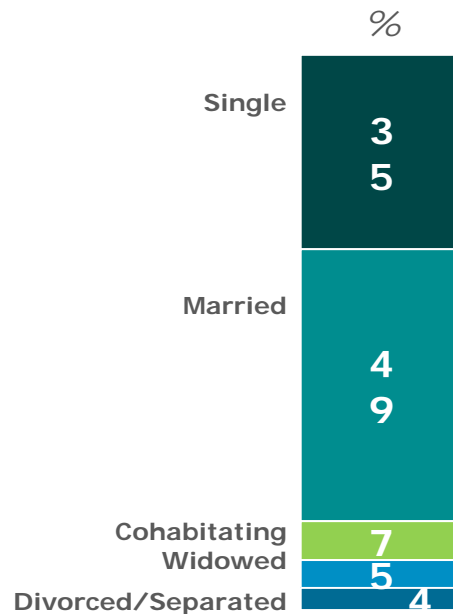
Region



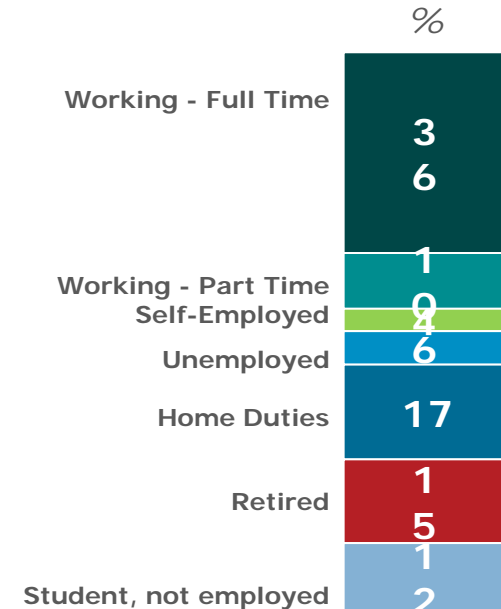
Area



Status



Status



Sample Detail

► Interviews achieved and corrective weighting applied.

	No of interviews				
	Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
Total	505	504	606	708	503
*Gender	No.	No.	No.	No.	No.
Male	243	245	297	350	247
Female	262	259	309	358	256
*Age					
16-24	74	69	67	76	55
25-34	95	93	92	100	61
35-49	167	148	178	205	135
50-64	104	105	149	176	117
65+	65	89	120	151	135
*Socio-economic status					
ABC1	239	220	233	242	152
C2DE	259	253	312	355	262
F	7	31	61	111	89

	Weighting applied				
	Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
	62%	11%	15%	10%	1%
	%	%	%	%	%
	48	49	50	51	52
	52	51	50	49	48
	17	15	15	14	14
	24	19	16	15	14
	27	29	30	28	26
	19	22	23	24	26
	14	15	16	18	20
	46	44	39	34	32
	52	50	51	50	51
	2	6	10	16	18

Note the Age profile is older in more rural areas

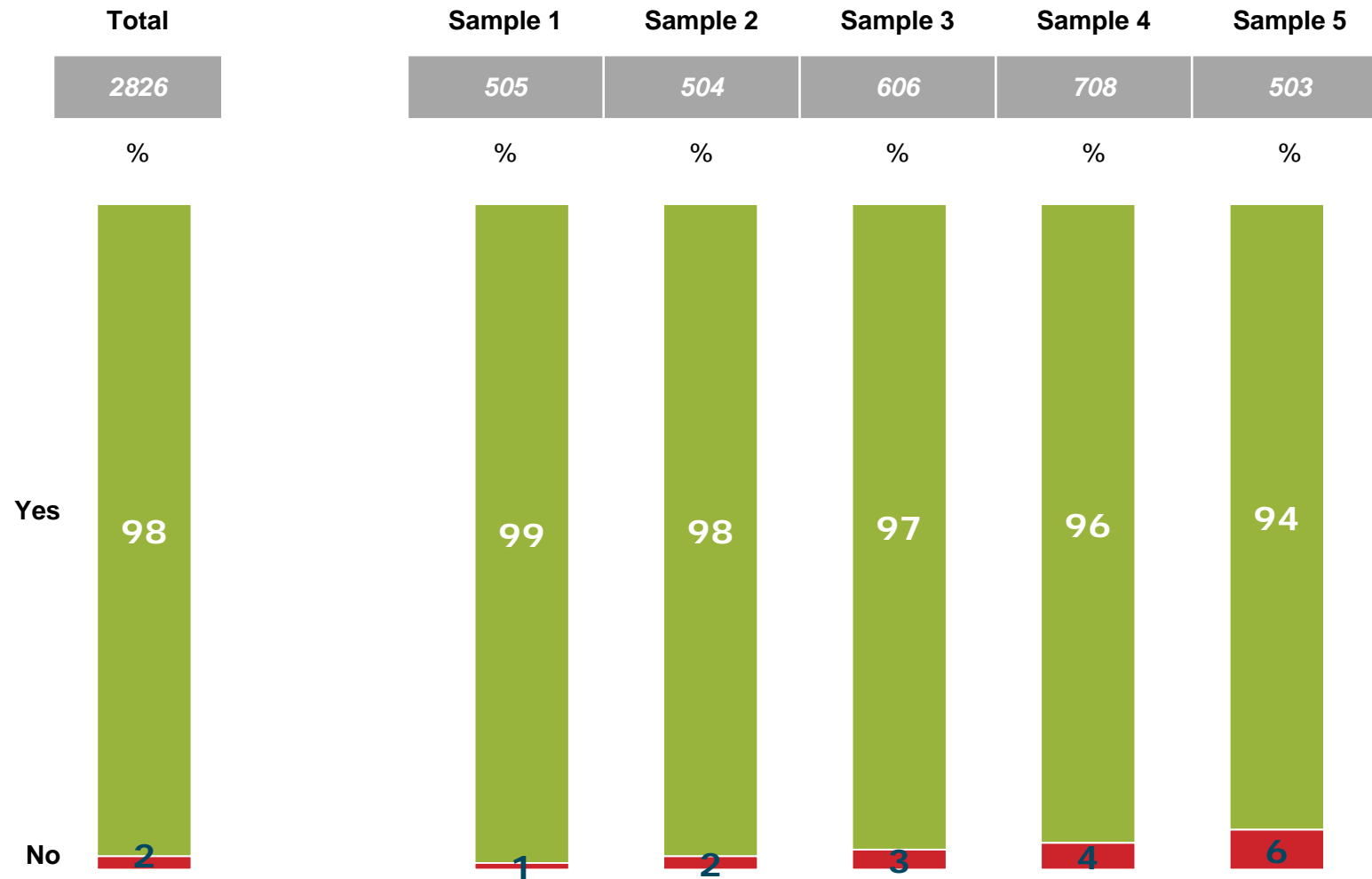
Socio-economic status is based on market research industry agreed figures (AIMRO)

Services in the Home



Mobile Phone Ownership x Segments

Base: All adults aged 15+: n=2826



Q.1 Do you personally have and use a mobile phone handset?

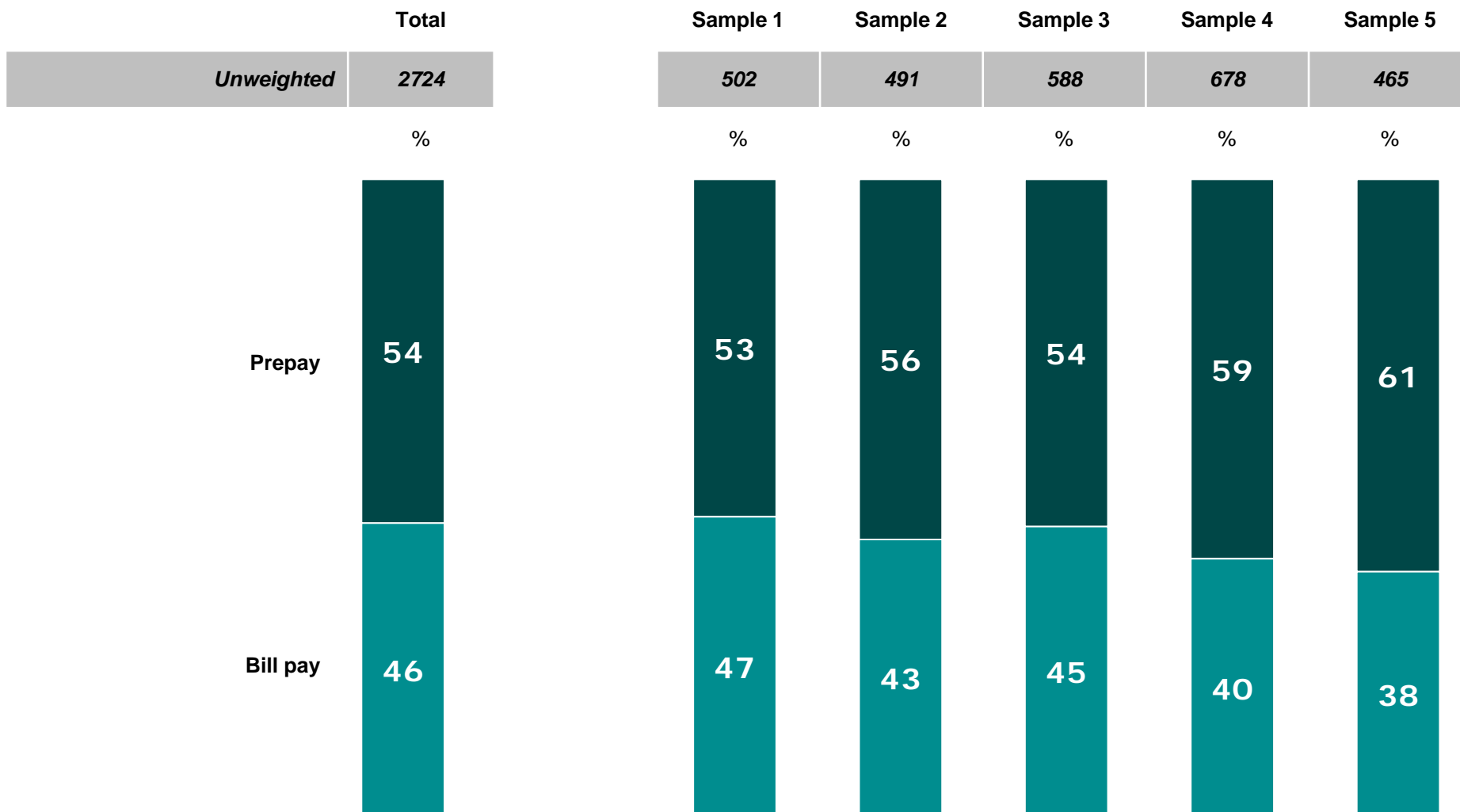
Mobile Phone Ownership x demographics

Base: All adults aged 15+: n=2826



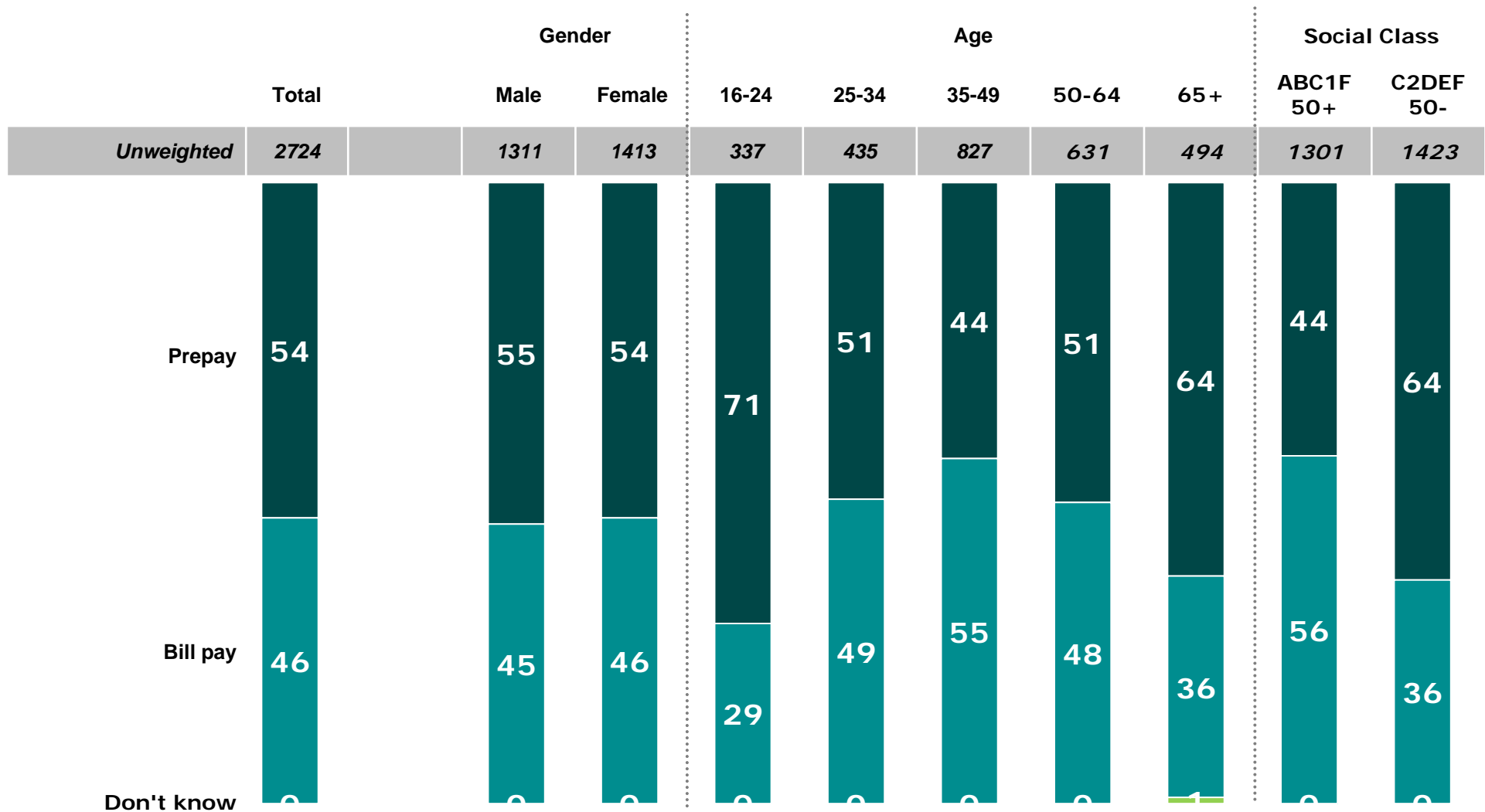
Incidence of prepay package vs bill pay mobile phone package x Samples

Base: All have mobile : n=2724



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

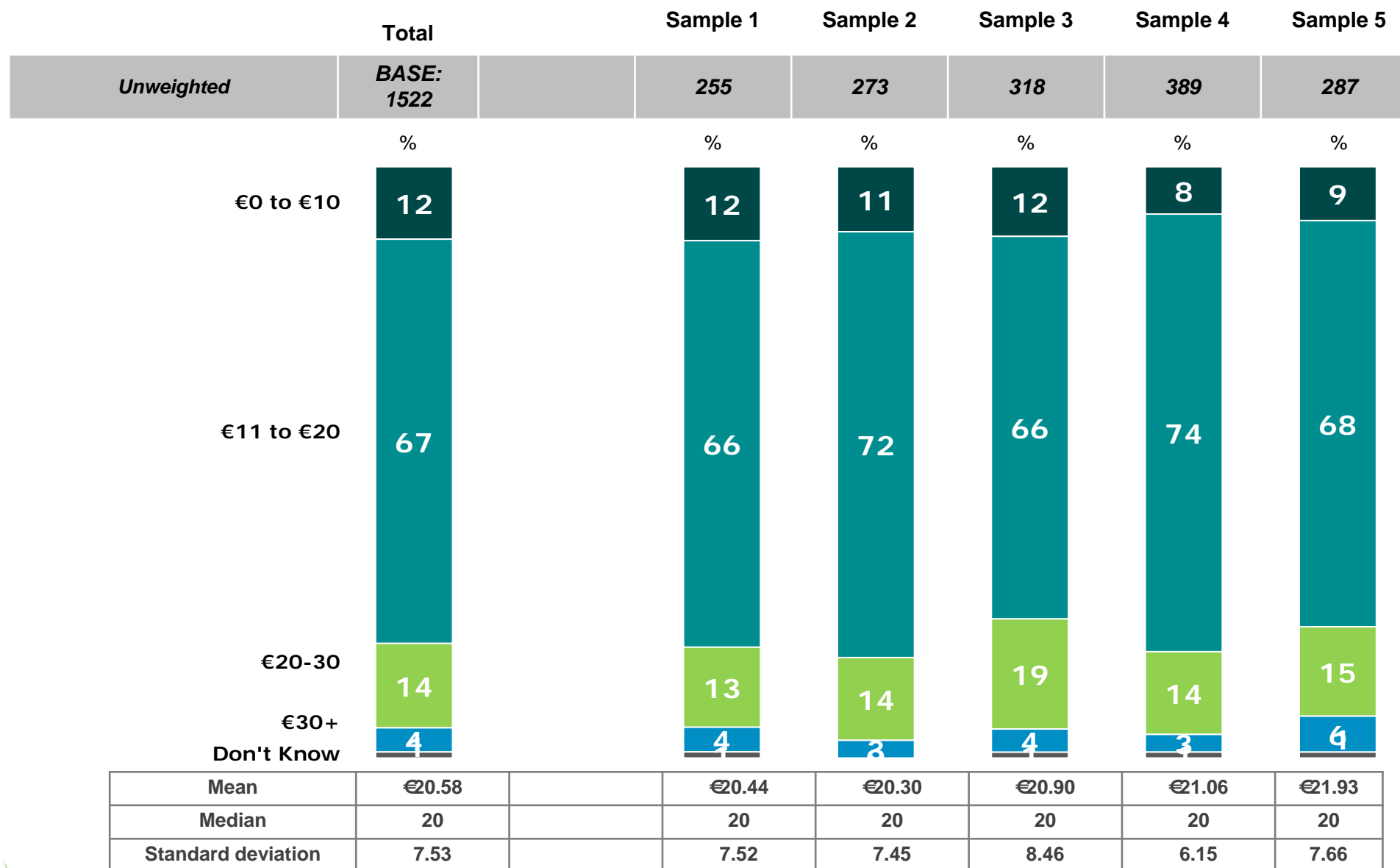
Base: All have mobile : n=2724



Q.9 Is your mobile plan/package a prepay package or bill pay package?

Monthly Prepay spend on mobile phone

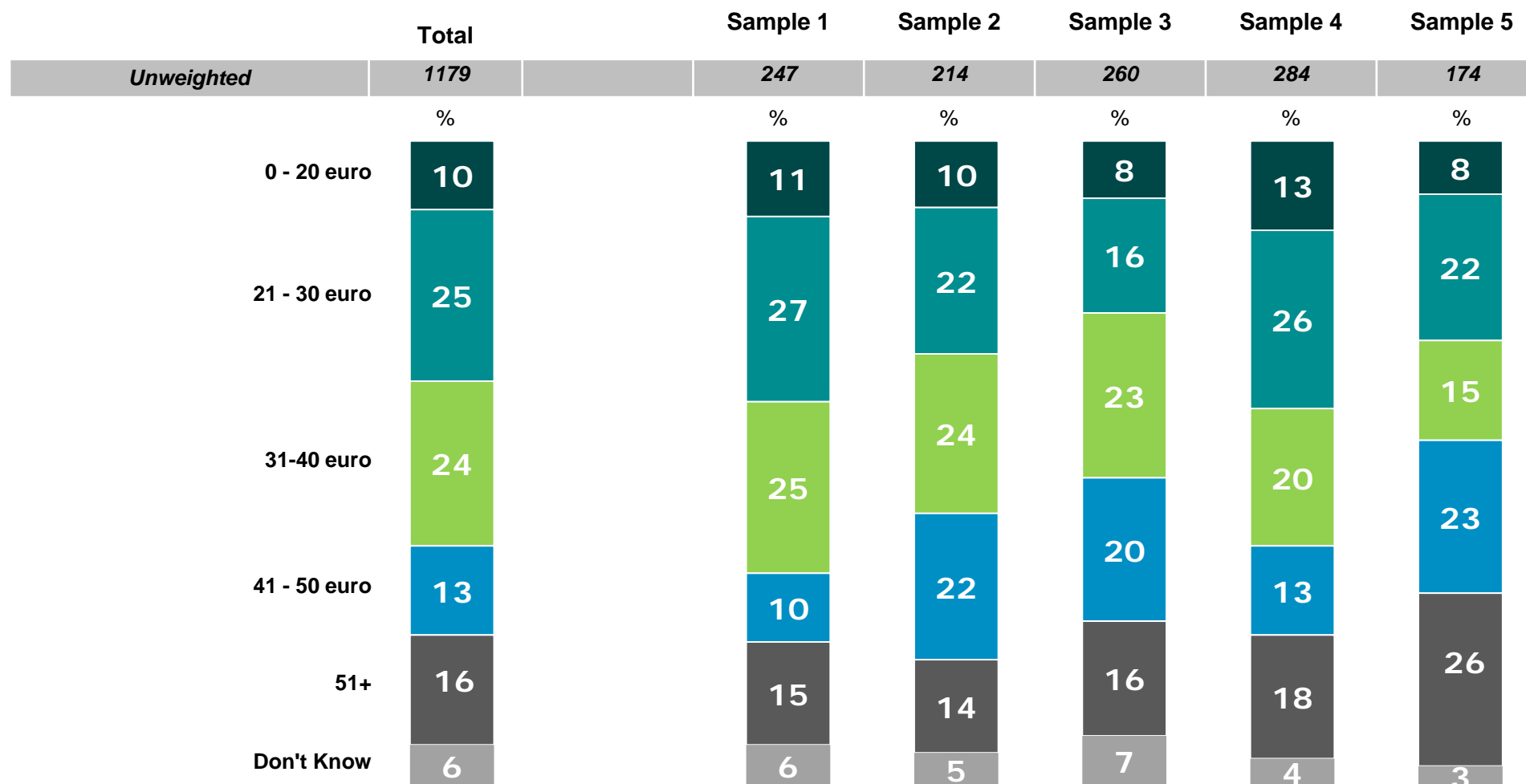
Base: All prepay mobile phone users: n=1522



Q.10 In a typical month, how much do you spend on mobile phone top ups

Monthly billpay spend on mobile phone bill x segments

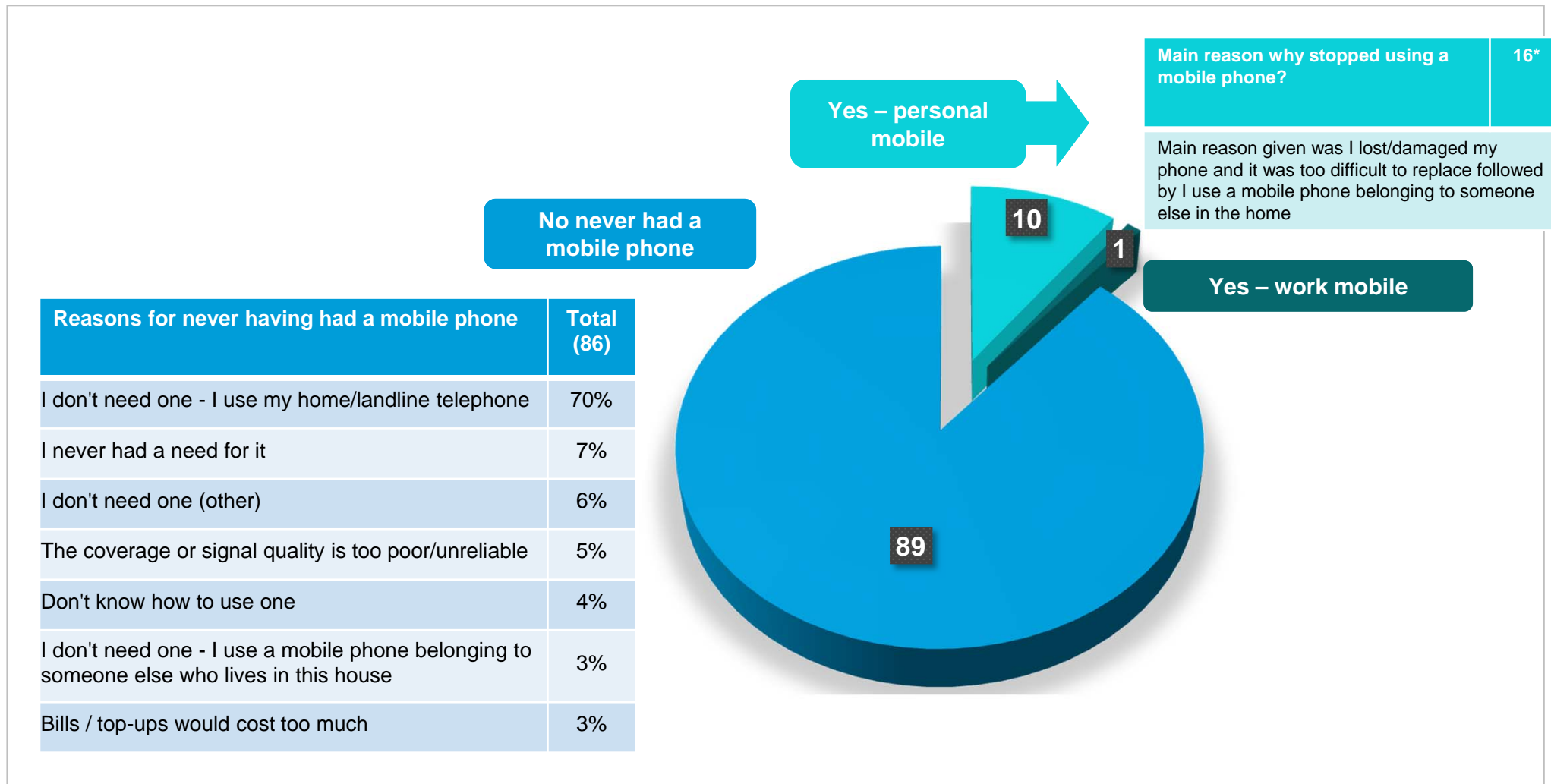
Base: All billpay mobile phone users: n=1179



Mean	€40.28	€38.63	€40.91	€47.89	€39.26	€43.36
Median	35.00	35.00	40.00	40.00	35.00	42.00
Standard deviation	33.33	18.40	18.61	76.12	17.10	17.81

Incidence of previously having a mobile phone

Base: All without a mobile phone n=102



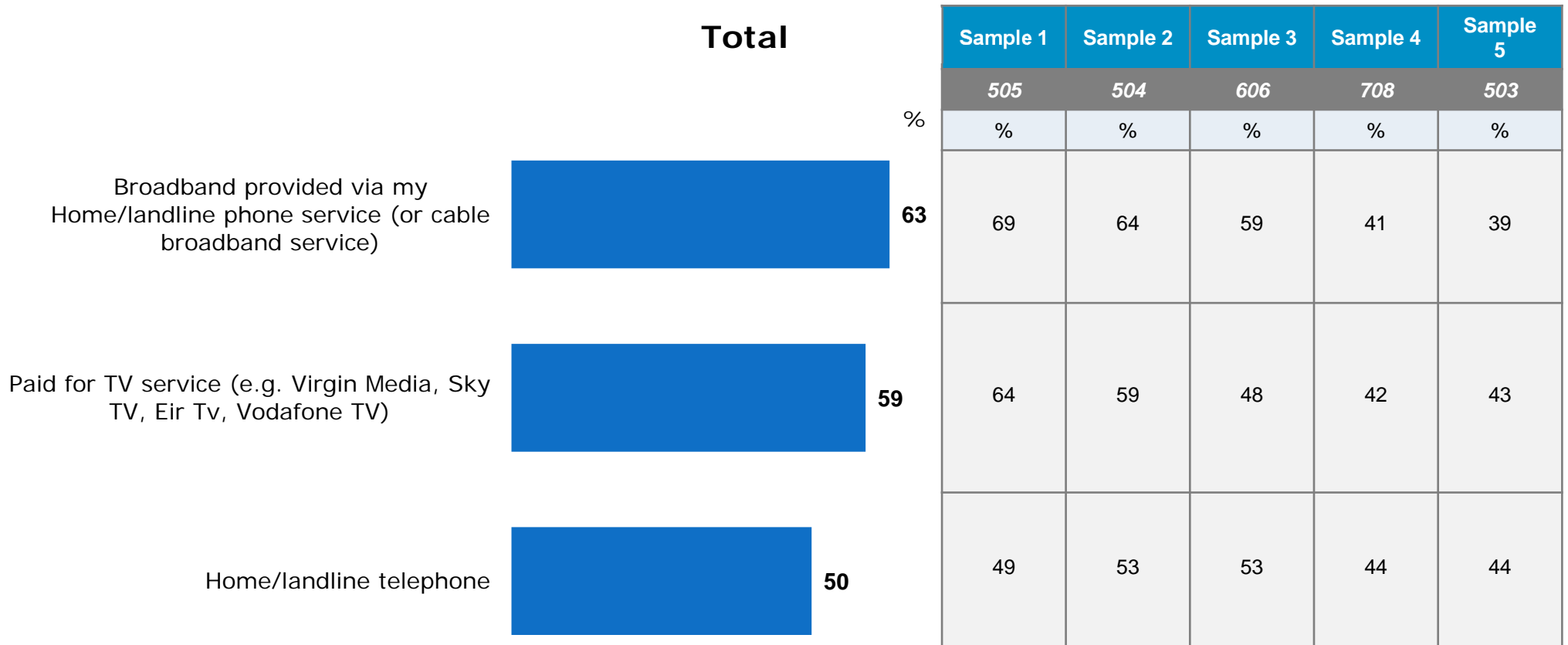
**Caution: small base*



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

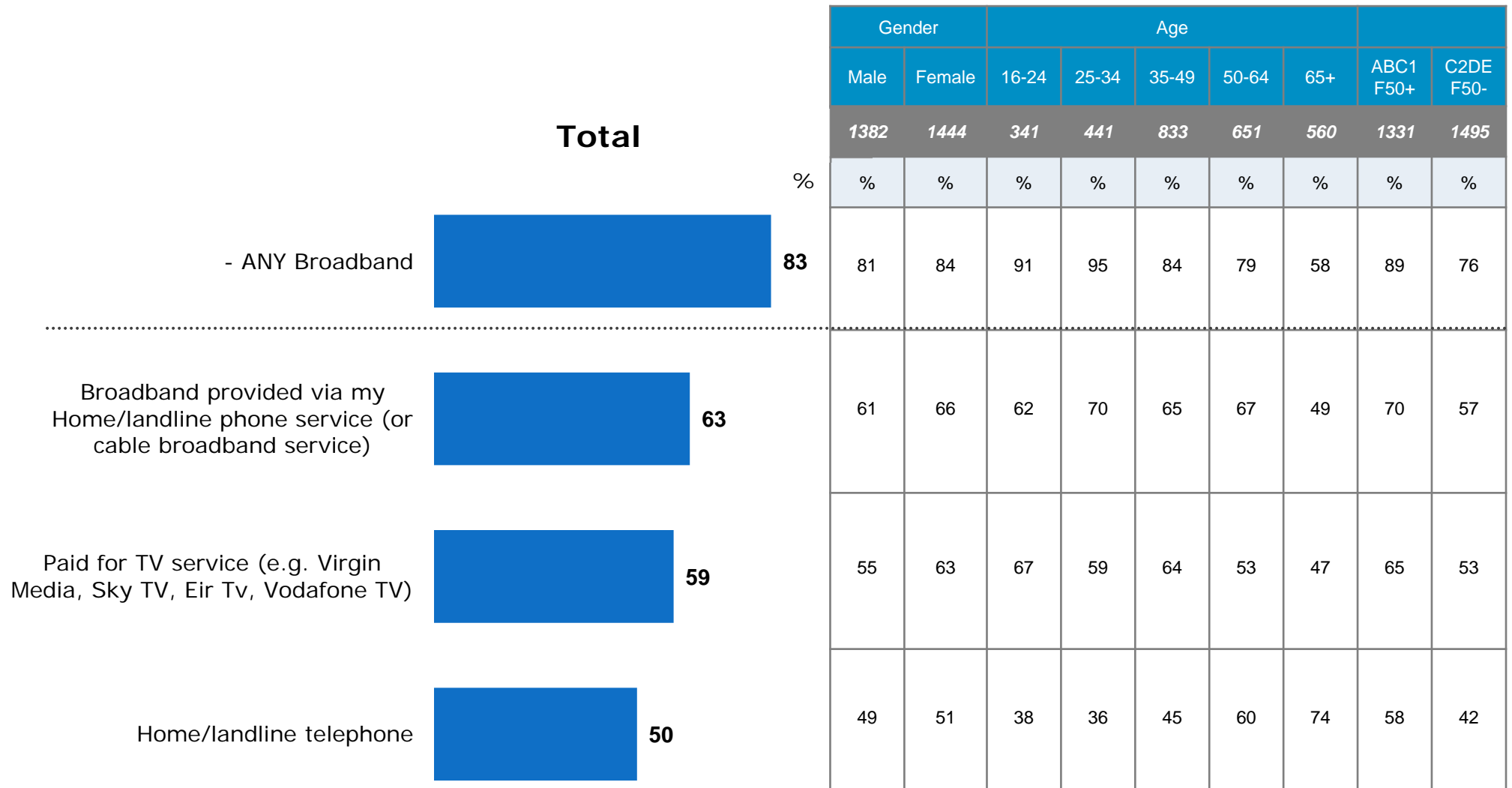
Ownership of services in the home x Segments

Base: All adults 15+:



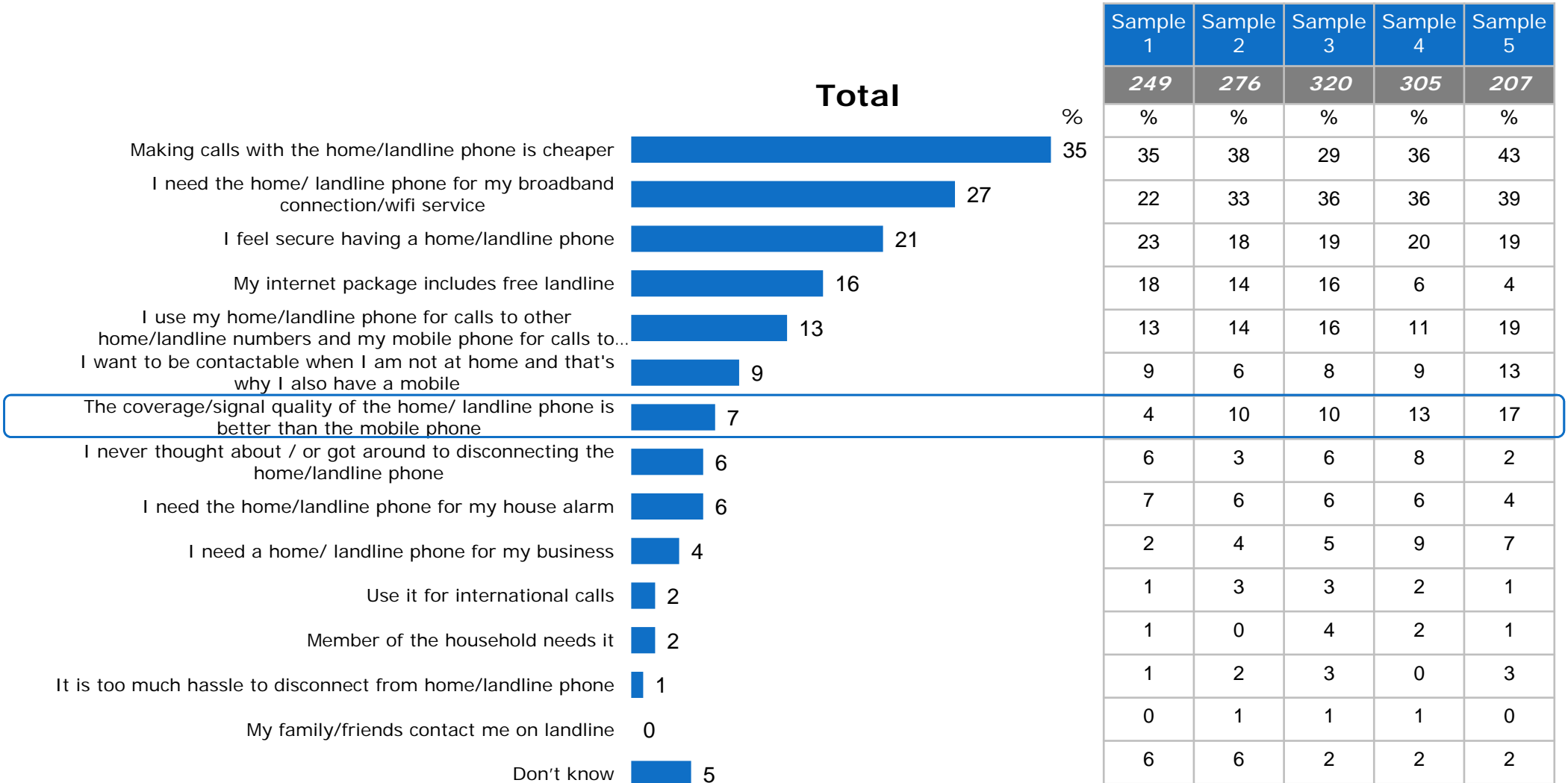
Ownership of services in the home x demographics

Base: All adults 15+



Rationale for having both a home phone and a mobile phone

Base: Have home/landline



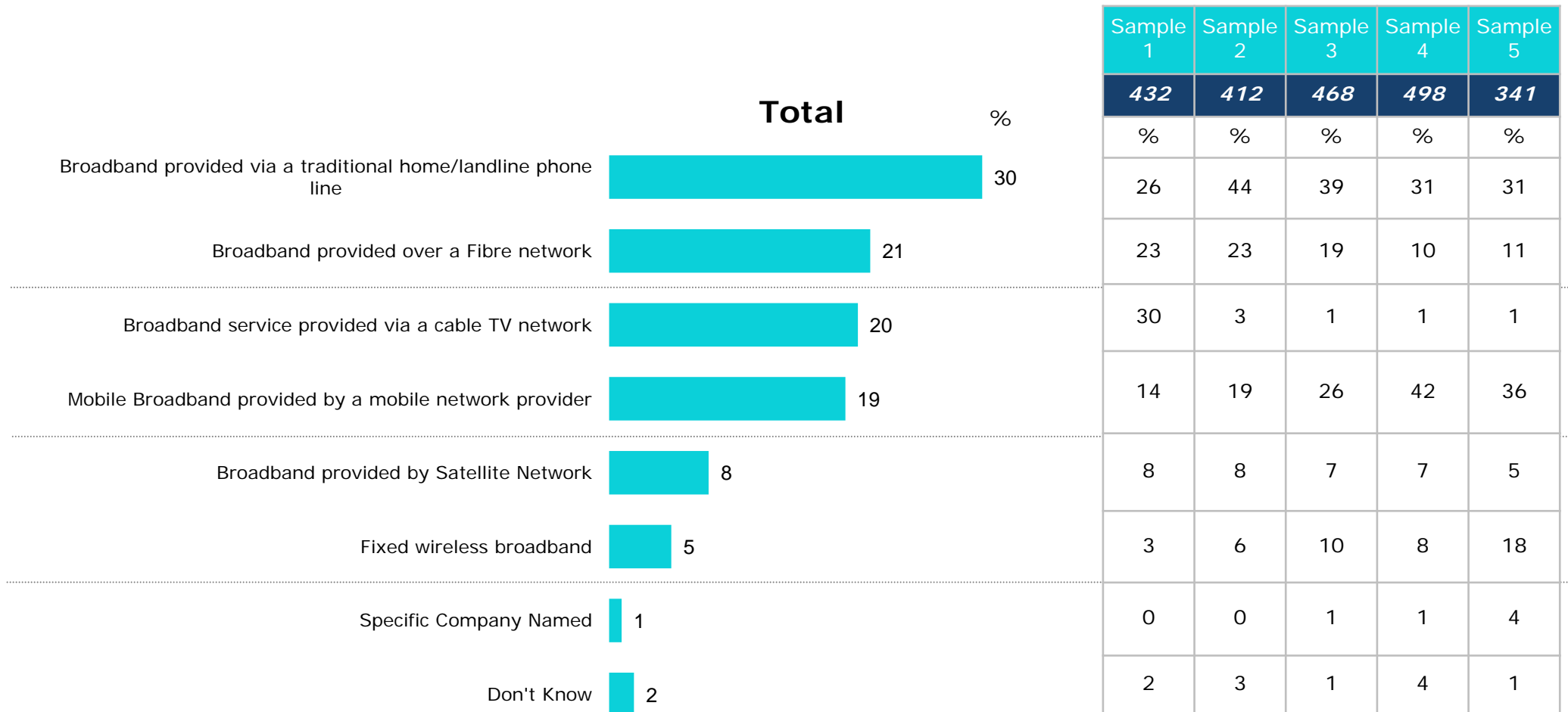
Rationale for having both a home/landline phone and a mobile phone

Base: have home/landline

	Total	Gender		Age					Social Class	
		Male	Female	16-24	25-34	35-49	50-64	65+	ABC1 F50+	C2DE F50-
UNWTD	1357	635	722	124	144	361	370	358	729	628
	%	%	%	%	%	%	%	%	%	%
Making calls with the home/landline phone is cheaper	35	34	36	26	27	41	34	39	36	34
I need the home/ landline phone for my broadband connection/wifi service	27	30	24	20	23	34	25	27	27	26
I feel secure having a home/landline phone	21	19	23	10	24	16	24	29	19	24
My internet package includes free landline	16	17	15	20	23	20	15	3	20	10
I use my home/landline phone for calls to other home/landline numbers and my mobile phone for calls to mobile phones	13	12	15	7	11	13	15	18	14	13
I want to be contactable when I am not at home and that's why I also have a mobile	9	10	7	5	7	7	10	12	10	7
The coverage/signal quality of the home/ landline phone is better than the mobile phone	7	5	8	2	7	7	8	8	7	7
I never thought about / or got around to disconnecting the home/landline phone	6	6	6	4	4	5	8	7	5	8
I need the home/landline phone for my house alarm	6	6	7	1	4	4	8	12	4	9
I need a home/ landline phone for my business	4	4	3	1	5	6	3	2	5	2
Use it for international calls	2	1	2	-	3	1	2	2	2	1
Member of the household needs it	2	2	1	4	1	2	2	-	2	1
It is too much hassle to disconnect from home/landline phone	1	1	1	0	3	1	1	0	1	1
My family/friends contact me on landline	0	1	0	1	-	1	-	0	1	0
Don't know	5	5	4	21	-	3	2	4	5	5

Broadband access in home x Samples

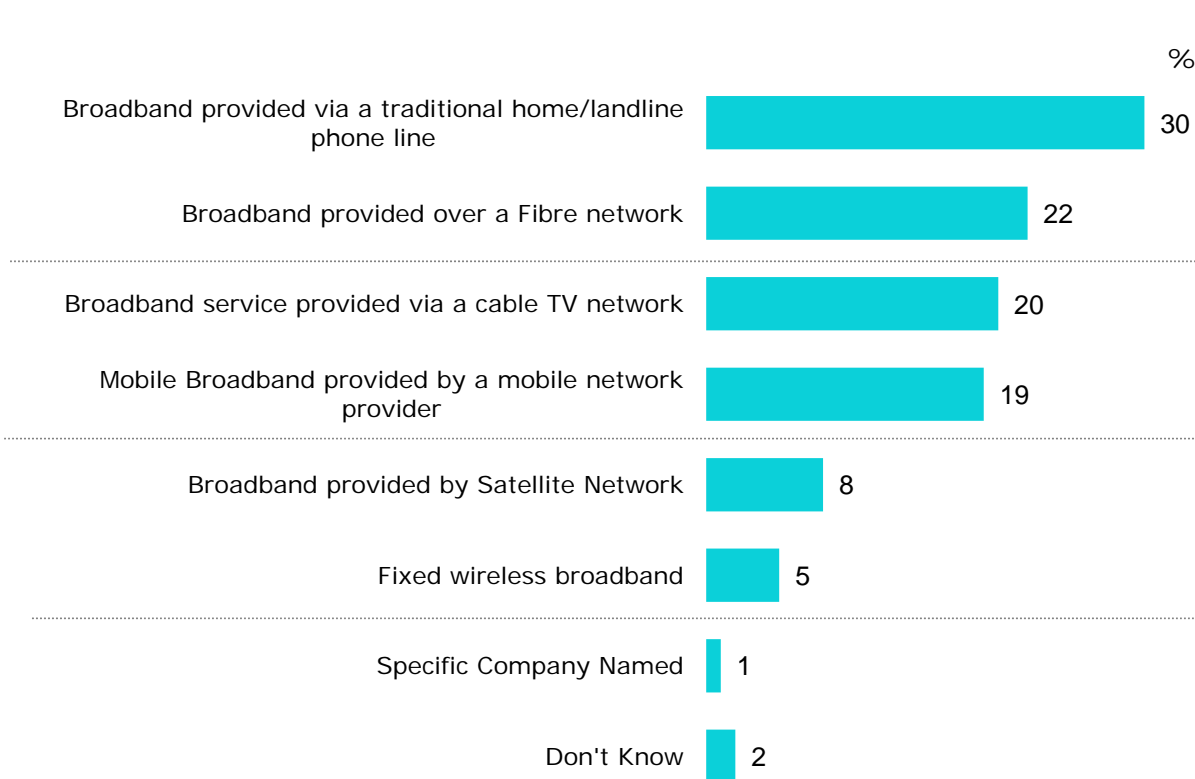
Base: Have any broadband in home



Broadband access in home x demographics

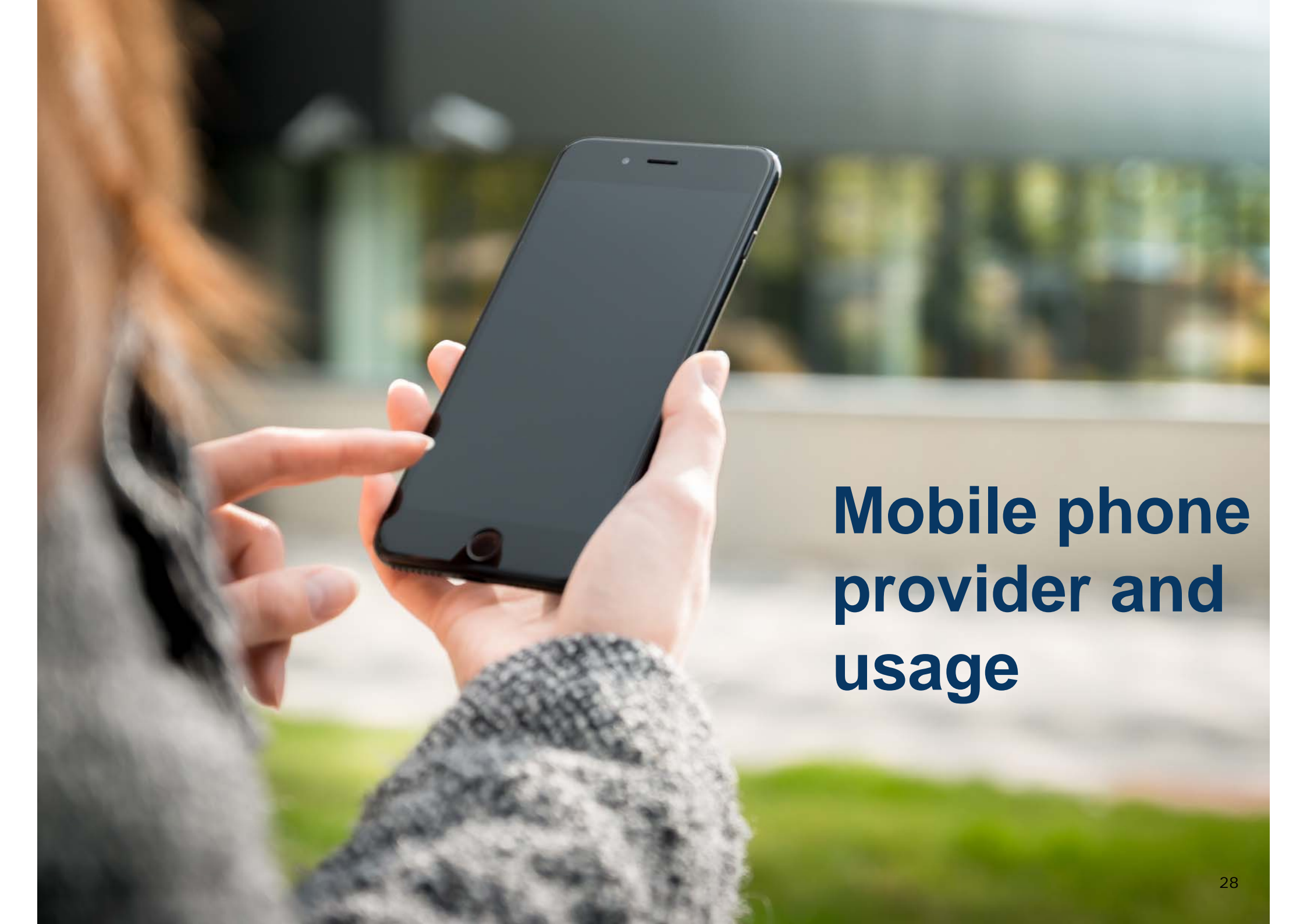
Base: Have any broadband in home: n=2151

Total



Gender		Age					Social Class	
Male	Female	16-24	25-34	35-49	50-64	65+	ABC1 F50+	C2DE F50-
1018	1133	297	387	702	491	274	1104	1047
%	%	%	%	%	%	%	%	%
29	31	25	23	29	36	48	31	29
20	22	19	24	23	21	11	20	22
20	20	18	21	21	16	22	20	19
20	18	25	19	19	16	14	18	19
9	6	10	9	7	7	3	8	7
5	5	6	5	5	4	4	5	4
1	0	0	0	1	2	0	1	1
2	3	3	2	1	4	1	2	3

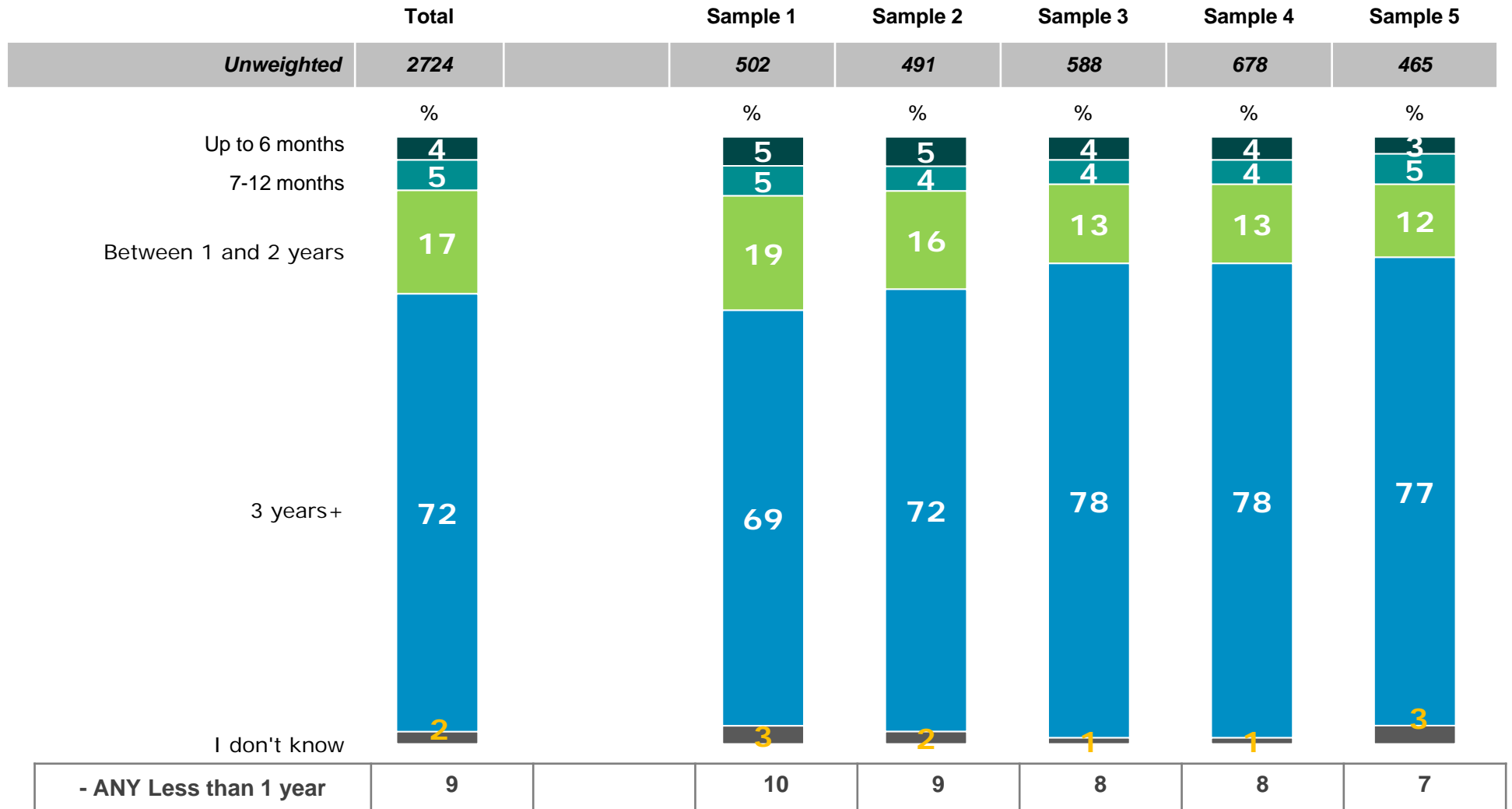


A close-up, over-the-shoulder view of a person's hands holding a black smartphone. The person is wearing a grey, textured knit sweater. The background is a blurred outdoor setting with a concrete railing, green grass, and a building with windows. The lighting is bright and natural, suggesting daytime.

Mobile phone provider and usage

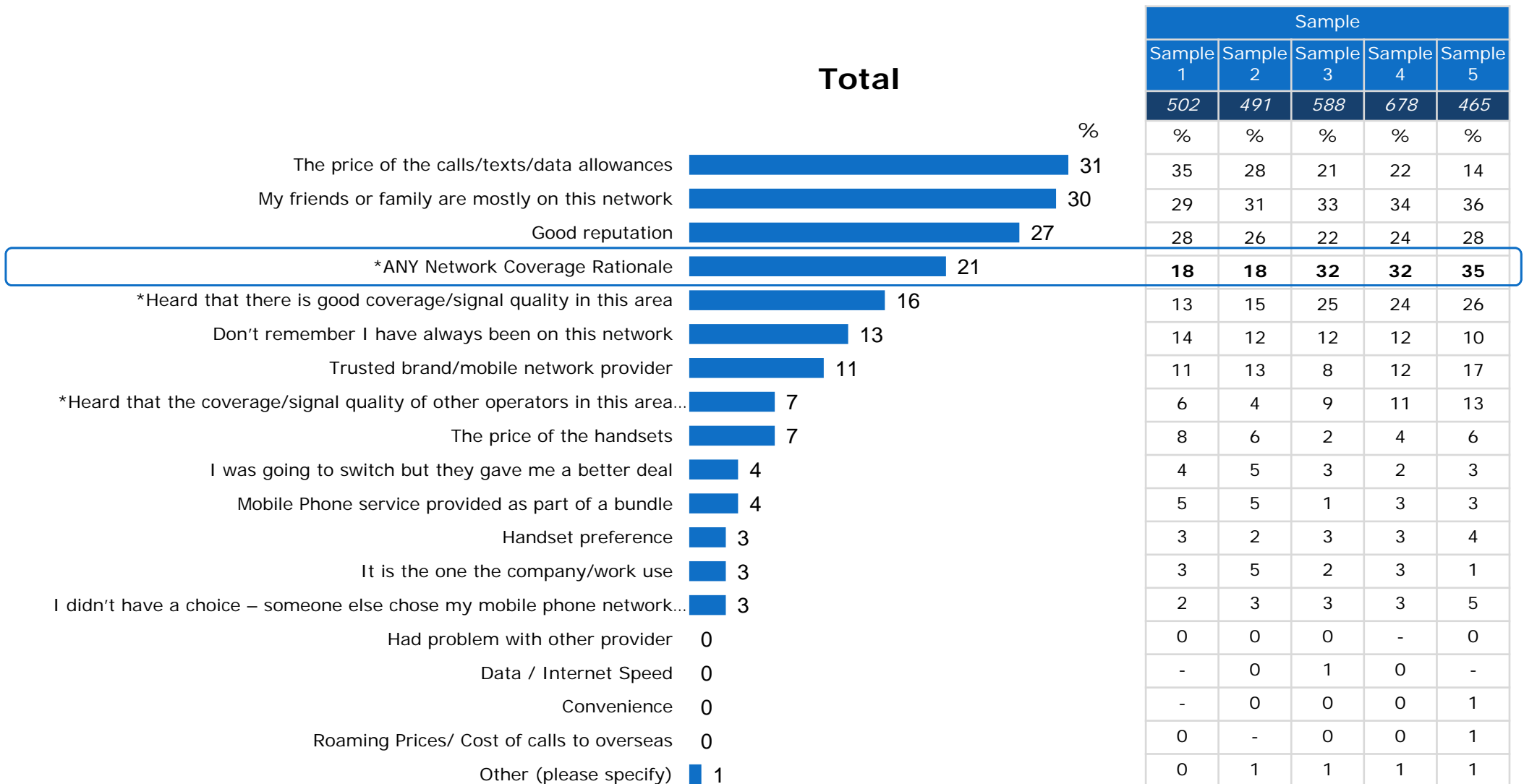
Length with current mobile phone provider x Samples

Base: All have mobile



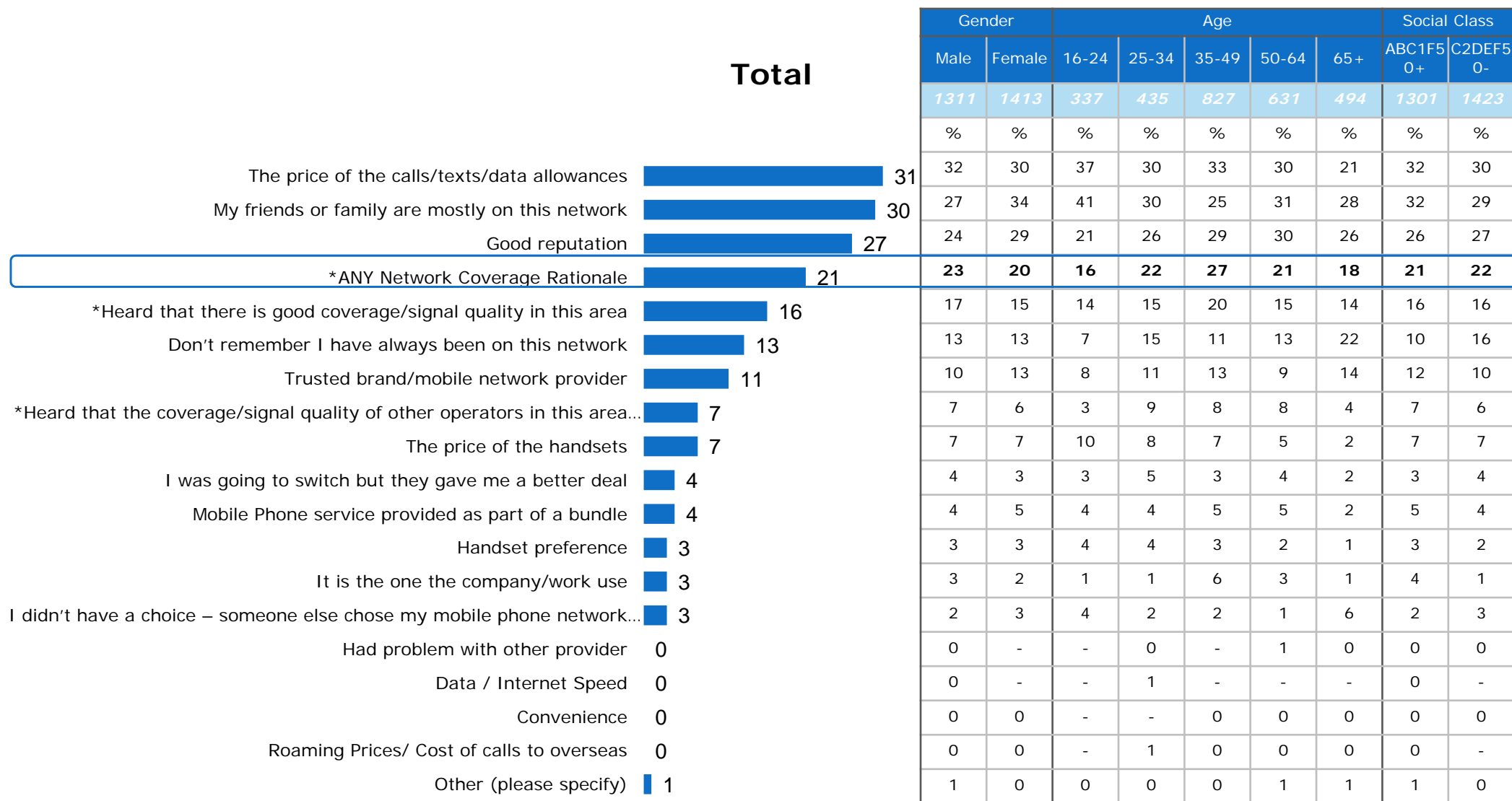
Rationale for choosing current provider X samples

Base: All have mobile



Rationale for choosing current provider X demographics

Base: All have mobile: n=2724

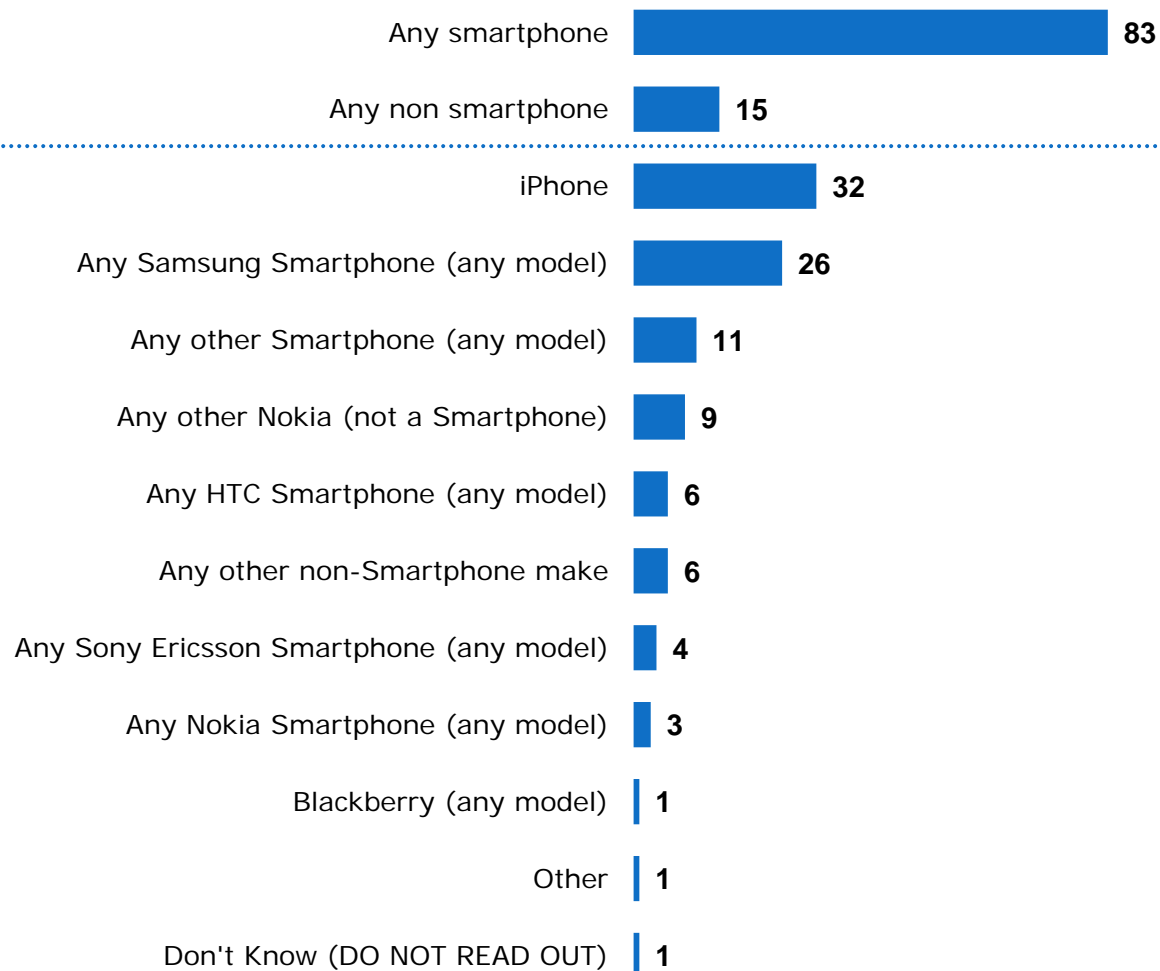


Ownership of mobile phone handsets x samples

Base: All have mobile

Total

%

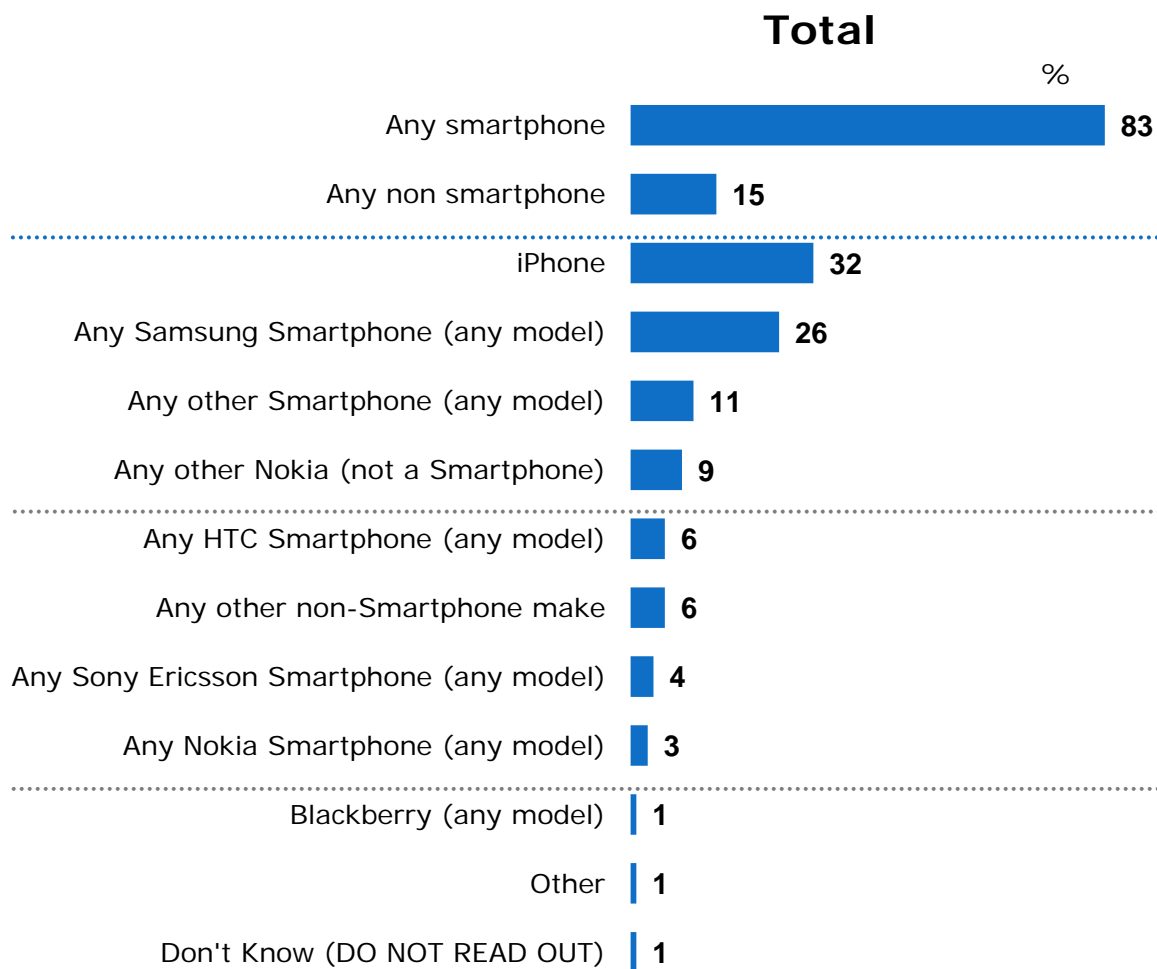


Sample				
Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
<i>502</i>	<i>491</i>	<i>588</i>	<i>678</i>	<i>465</i>
%	%	%	%	%
85	81	79	78	75
13	16	17	20	24
35	29	27	24	28
25	27	29	26	19
11	11	9	14	13
8	10	10	11	17
7	5	6	3	4
5	6	7	9	7
3	5	4	3	3
3	3	4	6	7
1	0	-	0	1
1	1	0	0	0
1	2	3	2	1



Ownership of mobile phone handsets x demographics

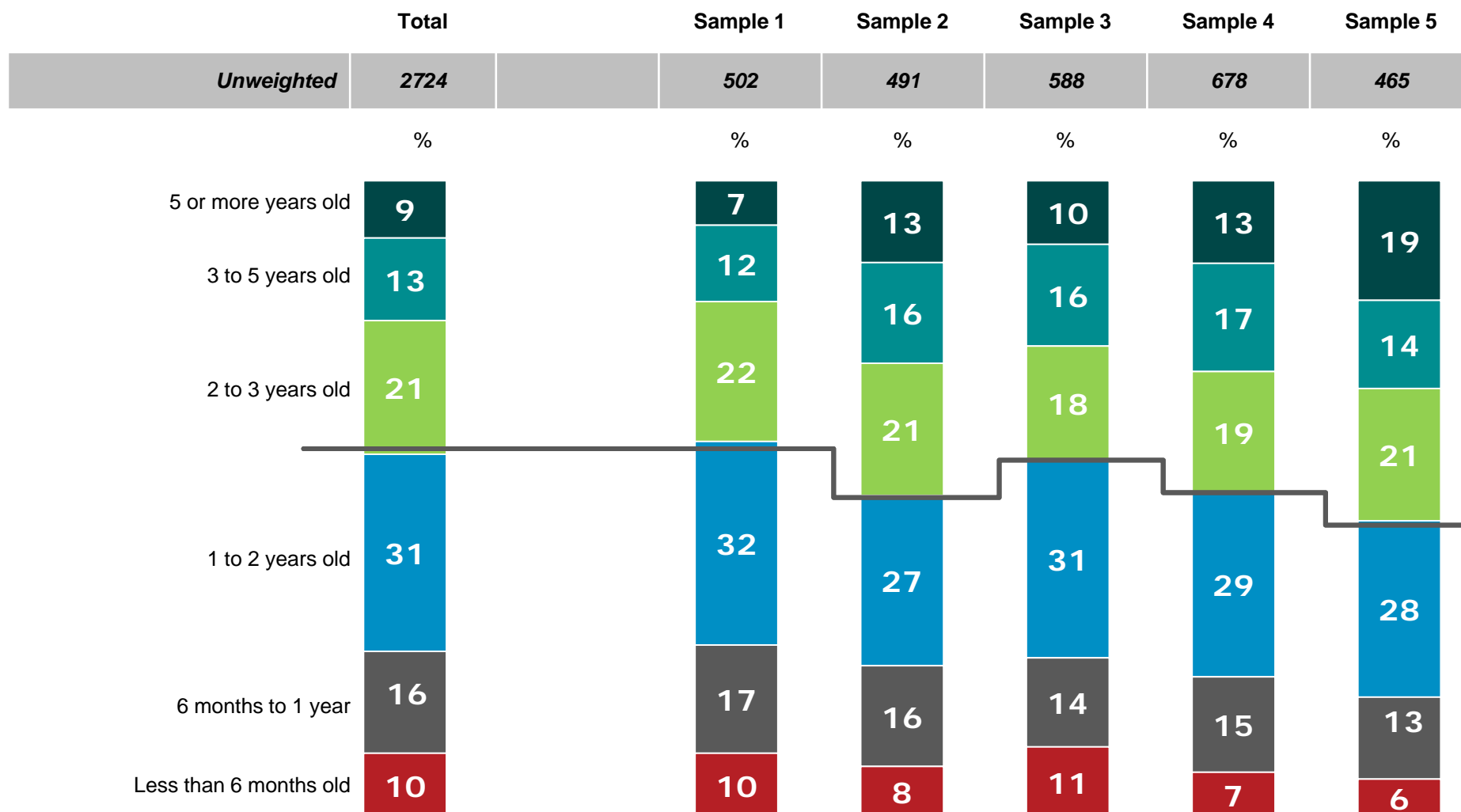
Base: All have mobile



Gender		Age					Social Class	
Male	Female	16-24	25-34	35-49	50-64	65+	ABC1F 50+	C2DEF 50-
1311	1413	337	435	827	631	494	1301	1423
%	%	%	%	%	%	%	%	%
82	84	98	93	90	75	49	89	77
16	13	2	4	8	23	47	9	20
31	33	48	43	33	19	14	39	25
25	27	24	24	31	30	14	26	26
11	12	11	11	14	11	6	10	12
9	8	0	3	4	14	31	6	12
6	7	11	8	4	4	7	6	7
7	5	2	1	4	9	17	3	8
4	3	1	4	4	4	3	4	4
5	2	1	2	3	6	5	3	3
0	1	1	2	0	0	0	1	1
1	1	0	2	0	1	0	1	1
1	1	0	1	1	1	4	1	1

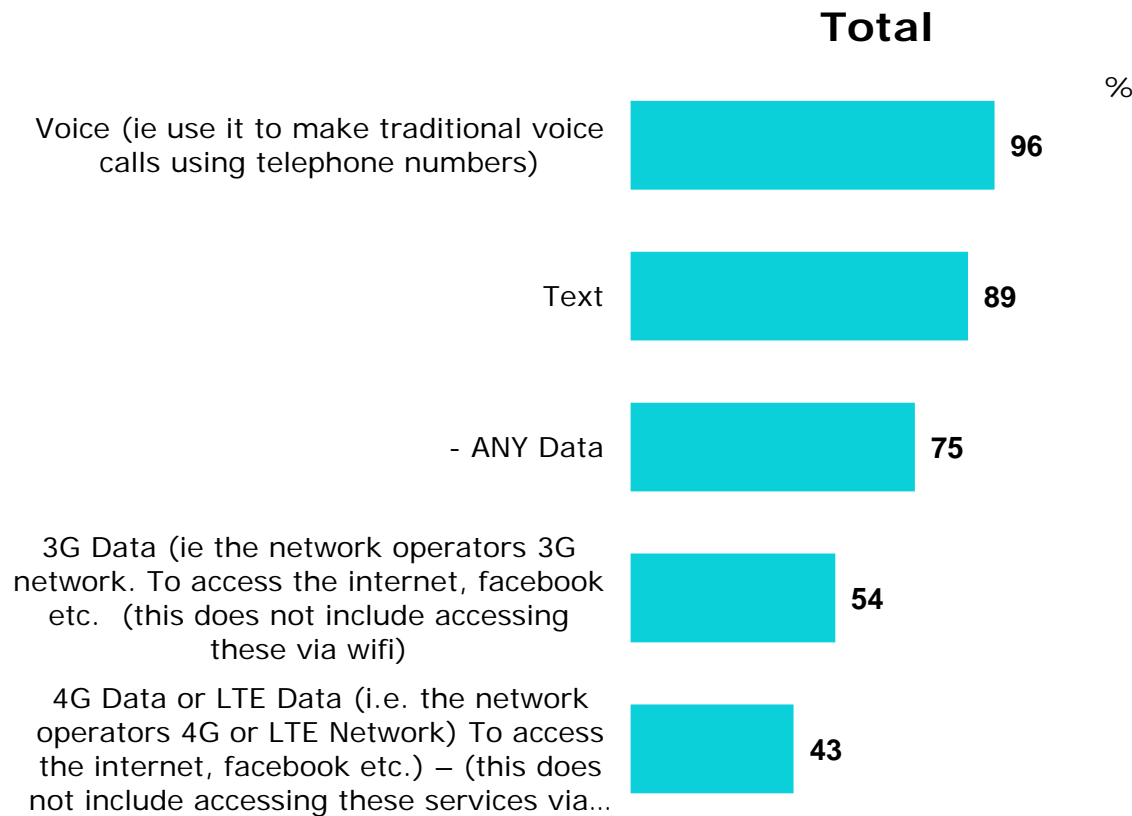
Age of current mobile phone (from when it was purchased new) x Segments

Base: All have mobile : n=2724



Incidence of using various services on mobile phone x Samples

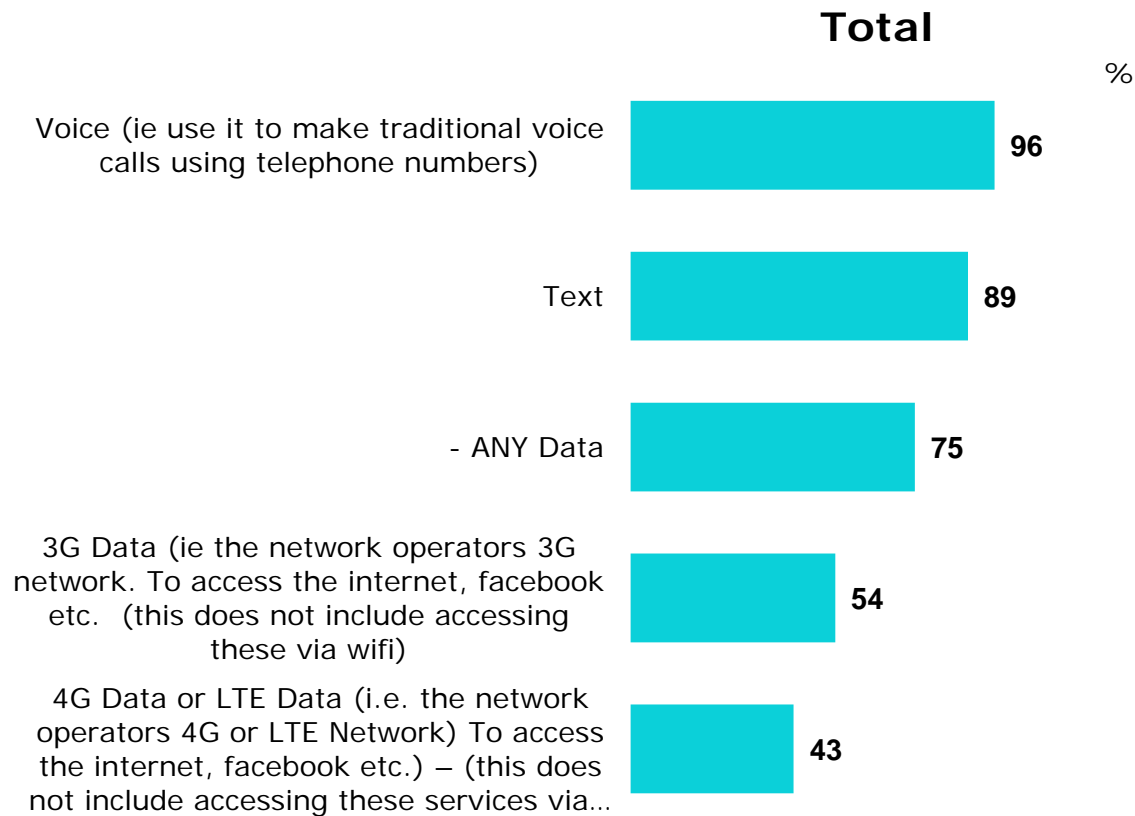
Base: All have mobile



Sample				
Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
502	491	588	678	465
%	%	%	%	%
96	94	96	96	97
89	87	91	88	87
78	71	72	67	66
55	55	53	51	52
48	39	34	30	27

Incidence of using various services on mobile phone x demographics

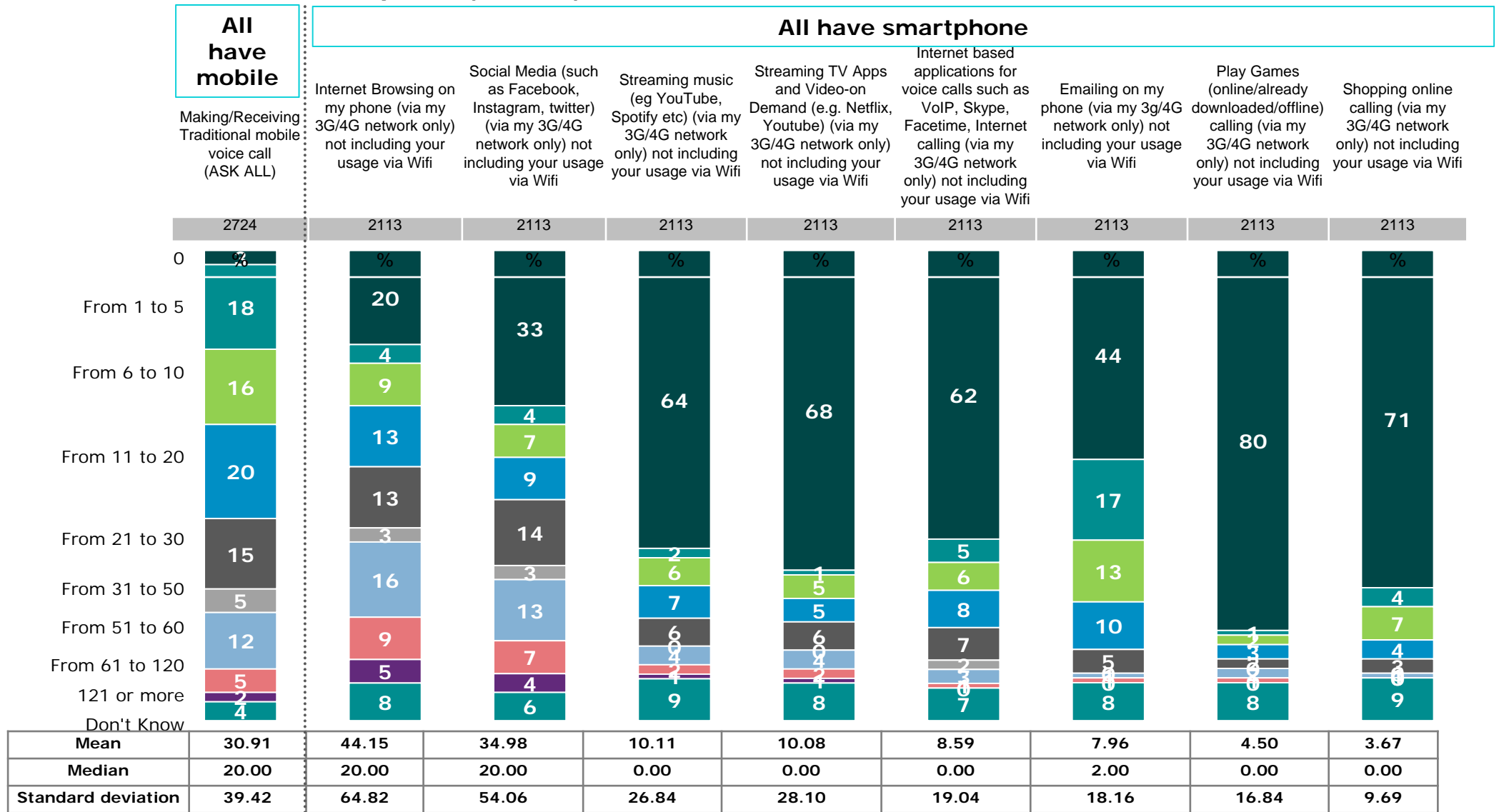
Base: All have mobile



Gender		Age					Social Class	
Male	Female	16-24	25-34	35-49	50-64	65+	ABC1 F50+	C2DE F50-
1311	1413	337	435	827	631	494	1301	1423
%	%	%	%	%	%	%	%	%
96	95	92	94	96	97	98	95	96
87	91	90	92	91	93	75	88	90
74	76	93	95	83	57	36	84	66
50	58	66	70	60	40	28	61	48
45	40	59	52	46	32	16	53	33

Estimated number of minutes used per day on each mobile phone for different services

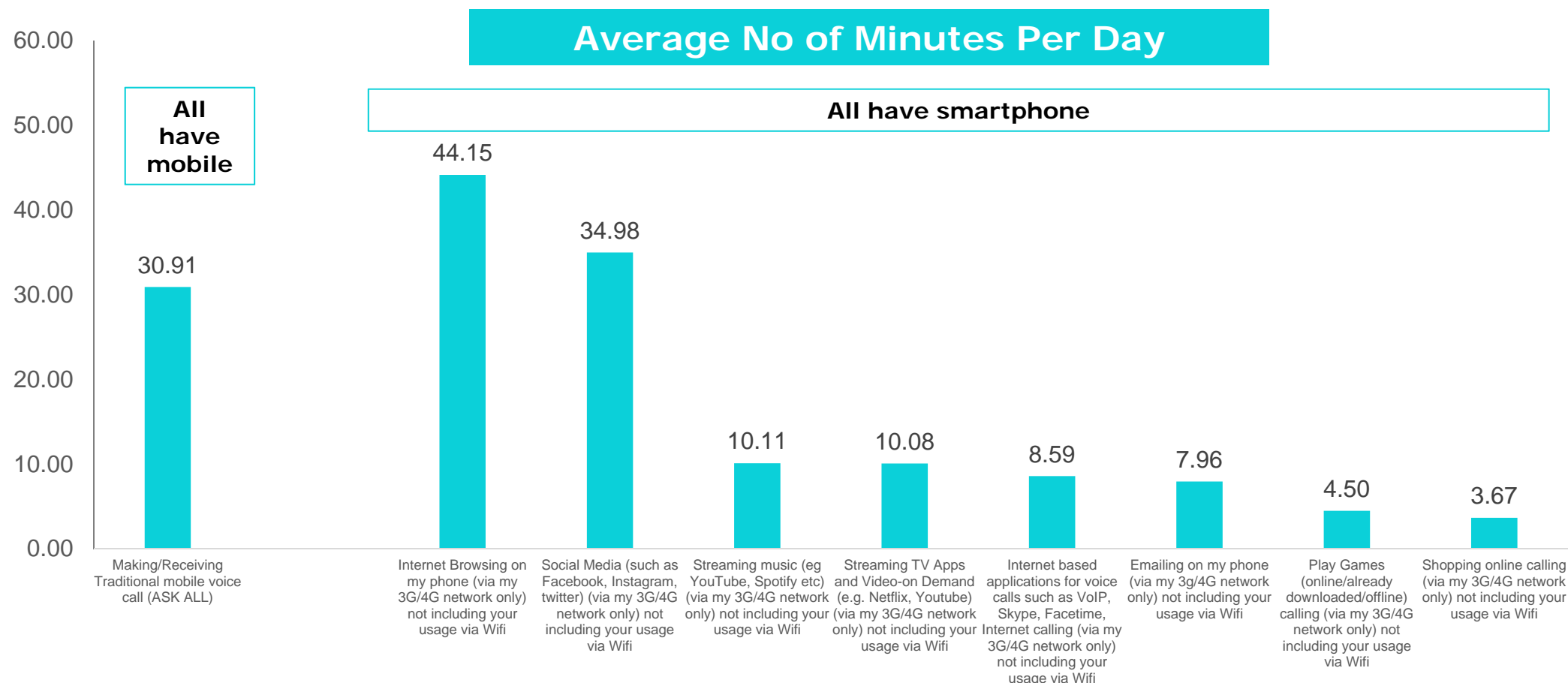
Base: All have a mobile/smartphone (for data)



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

Average mobile phone usage per day

Base: All have mobile/all have smartphone



Median	20.00		20.00	20.00	0.00	0.00	0.00	2.00	0.00	0.00
Standard deviation	39.42		64.82	54.06	26.84	28.10	19.04	18.16	16.84	9.69

** Answers are not mutually exclusive*

Q14 Thinking about your usage of your mobile phone in a typical day, how much do you use your mobile phone service for the following? [multiple answers]

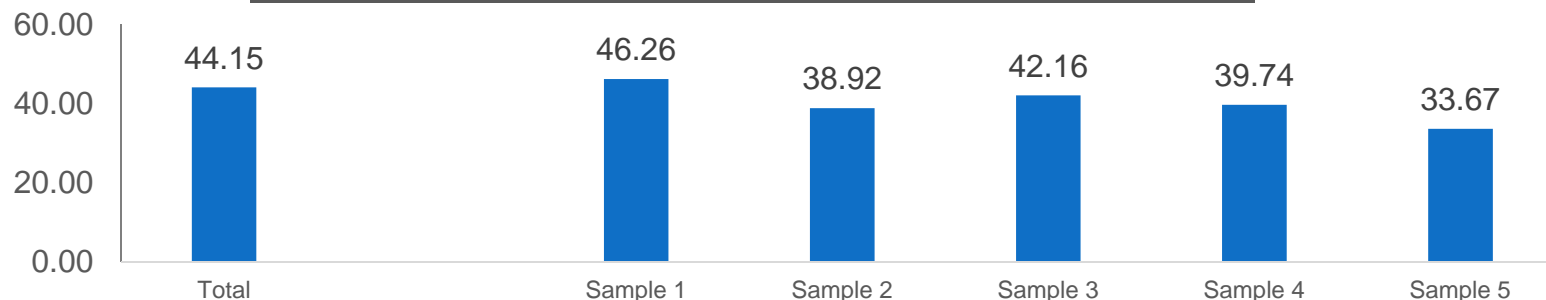
*By mobile phone service we mean using your mobile phone's network to do the following, and excludes any use of Wifi networks. C-K TO BE ONLY ASKED OF THOSE WITH SMART PHONE

Average number of minutes per day for each x segments

Base: All have mobile phone:

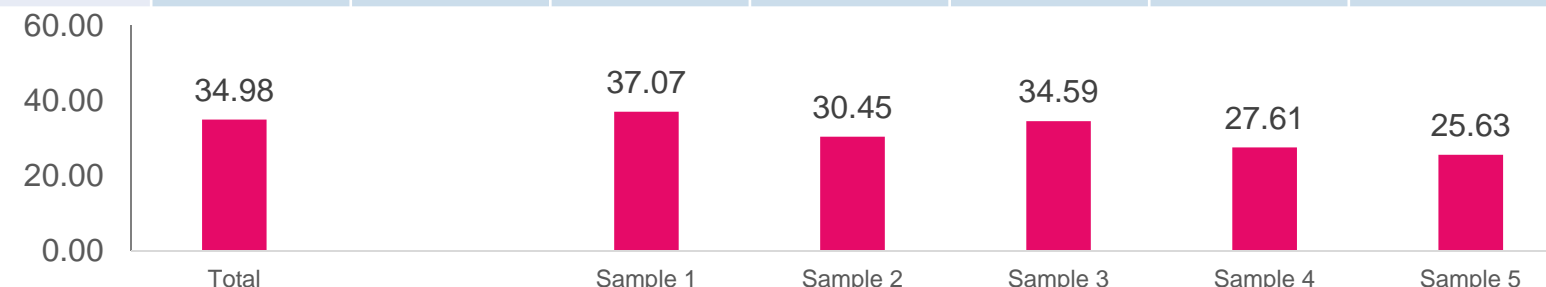
Average No of Minutes Per Day

Internet Browsing on my phone (via my 3G/4G network only) not including your usage via Wifi



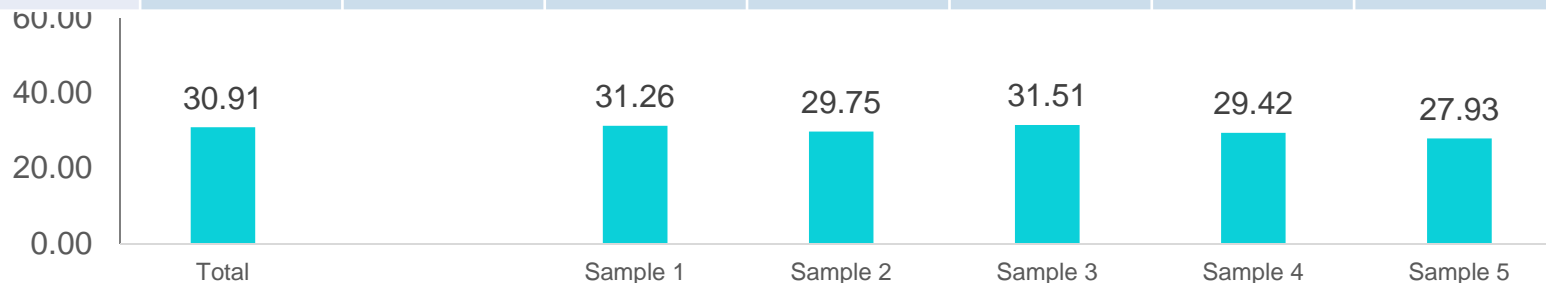
Base: <i>All have smartphone</i>	2113		429	390	449	513	332
Standard Deviations	64.82		68.39	54.06	59.70	58.59	50.04

Social Media (such as Facebook, Instagram, twitter) (via my 3G/4G network only) not including your usage via Wifi



Base: <i>All have smartphone</i>	2113		429	390	449	513	332
Standard Deviations	54.06		55.07	49.90	59.65	42.76	36.44

Making/Receiving Traditional mobile voice call (ASK ALL)



Base: <i>All have mobile</i>	2724		502	491	588	678	465
Standard Deviations	39.42		39.00	35.94	44.56	38.81	32.02



Average number of minutes per day for each x segments

Base: All have mobile phone:

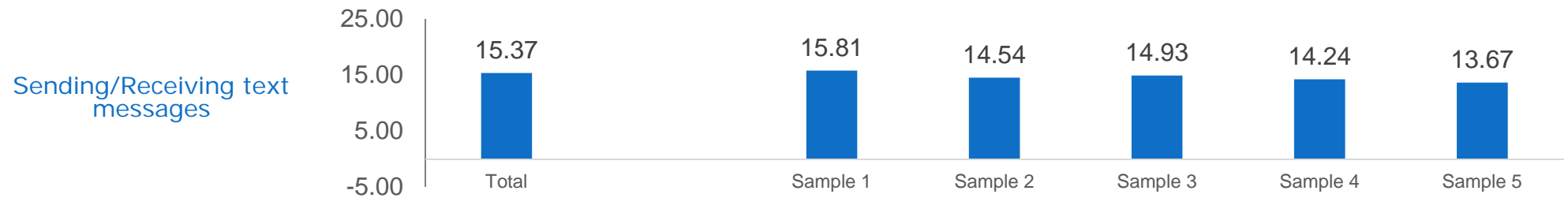
Usage via 3G/4G, excluding wifi



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

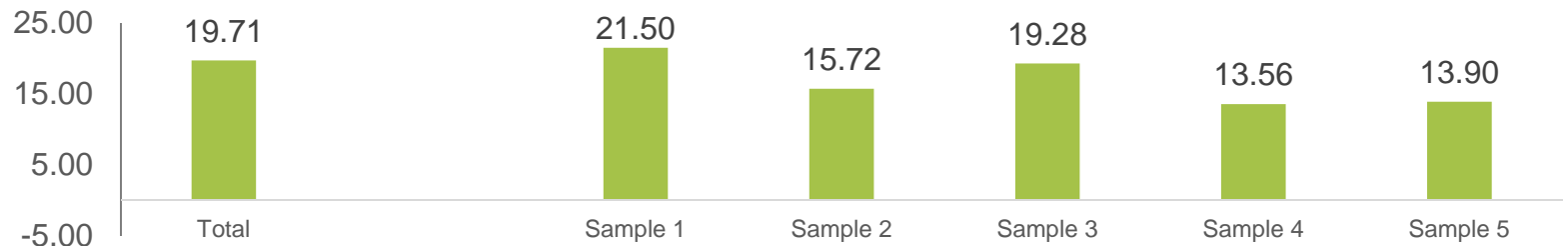
Base: All have mobile phone: n=2724

Average No of text messages per day



Base:	2724	502	491	588	678	465
Standard deviation	24.68	26.06	20.05	21.26	25.44	15.26

Messaging applications such as WhatsApp, Snapchat, Facebook messenger, iMessages, Viber (via my 3G/4G network only) not including your usage via Wifi

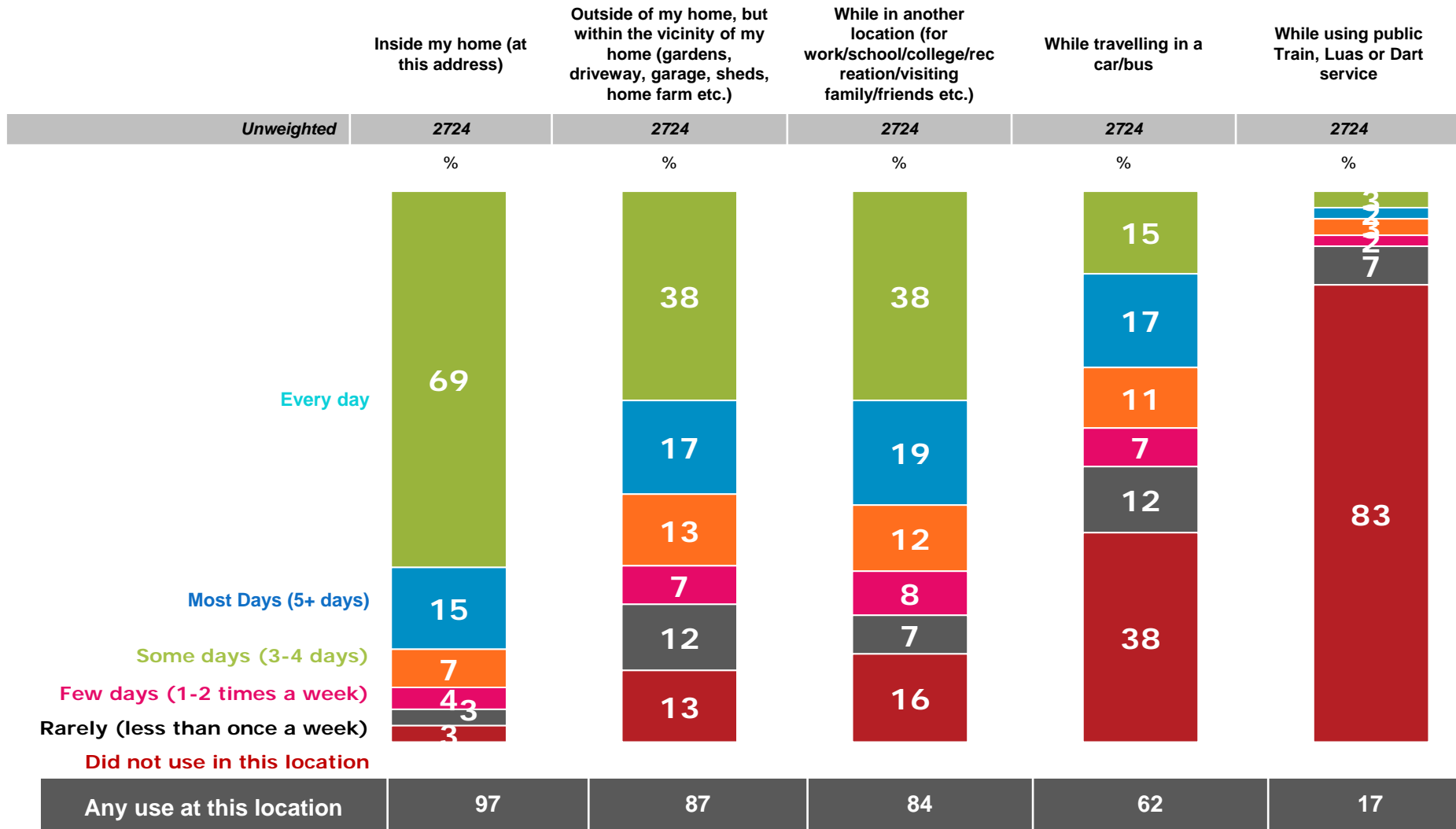


Base:	2113	429	390	449	513	332
Standard deviation	34.73	34.22	28.59	45.15	26.01	23.27



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

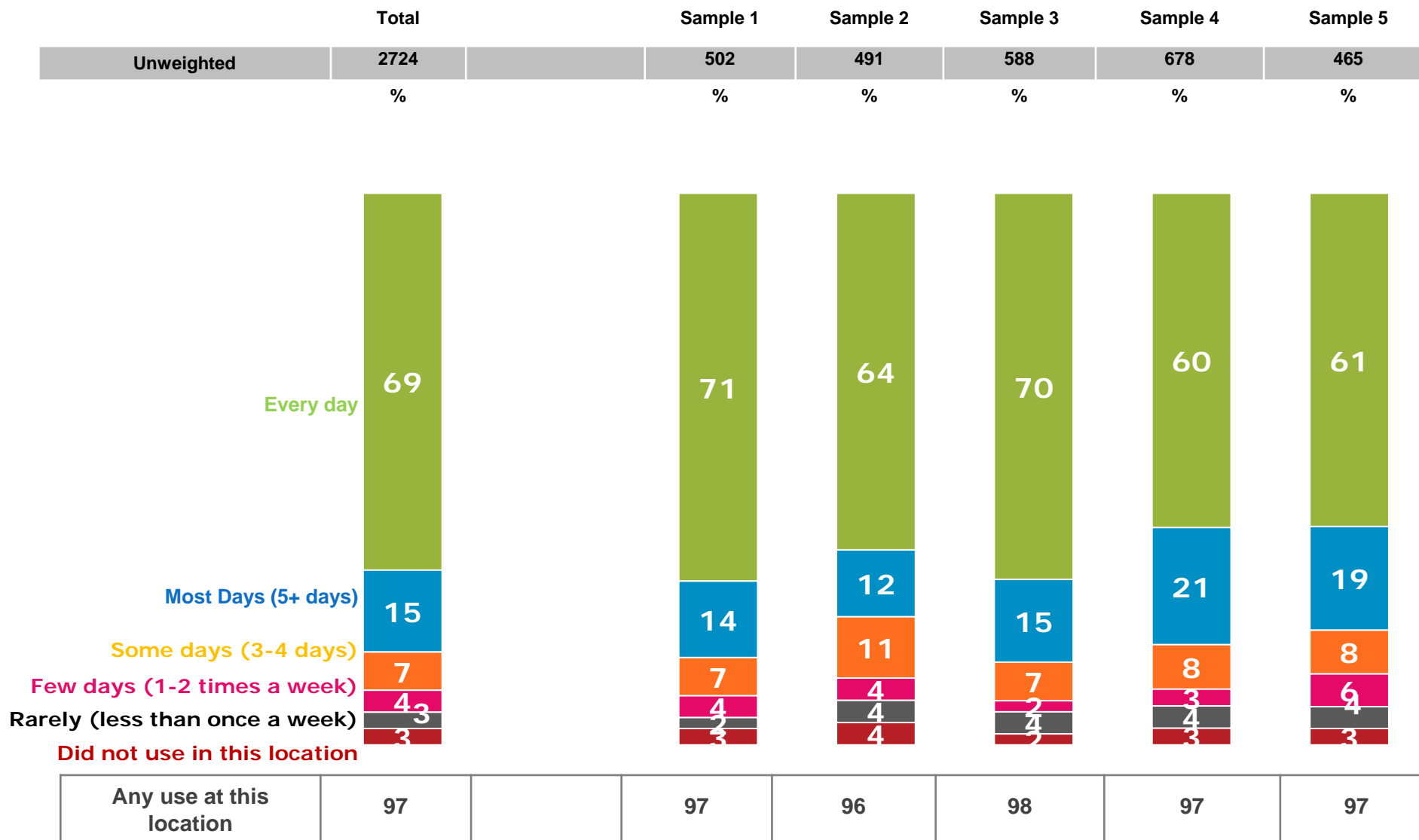
Base: All have mobile : n=2724



Q15 Thinking back on the past week, how often in the following locations, did you typically use your mobile for voice calls and texts on the operators network (i.e. not using wifi on bus, café, home etc.) ?

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

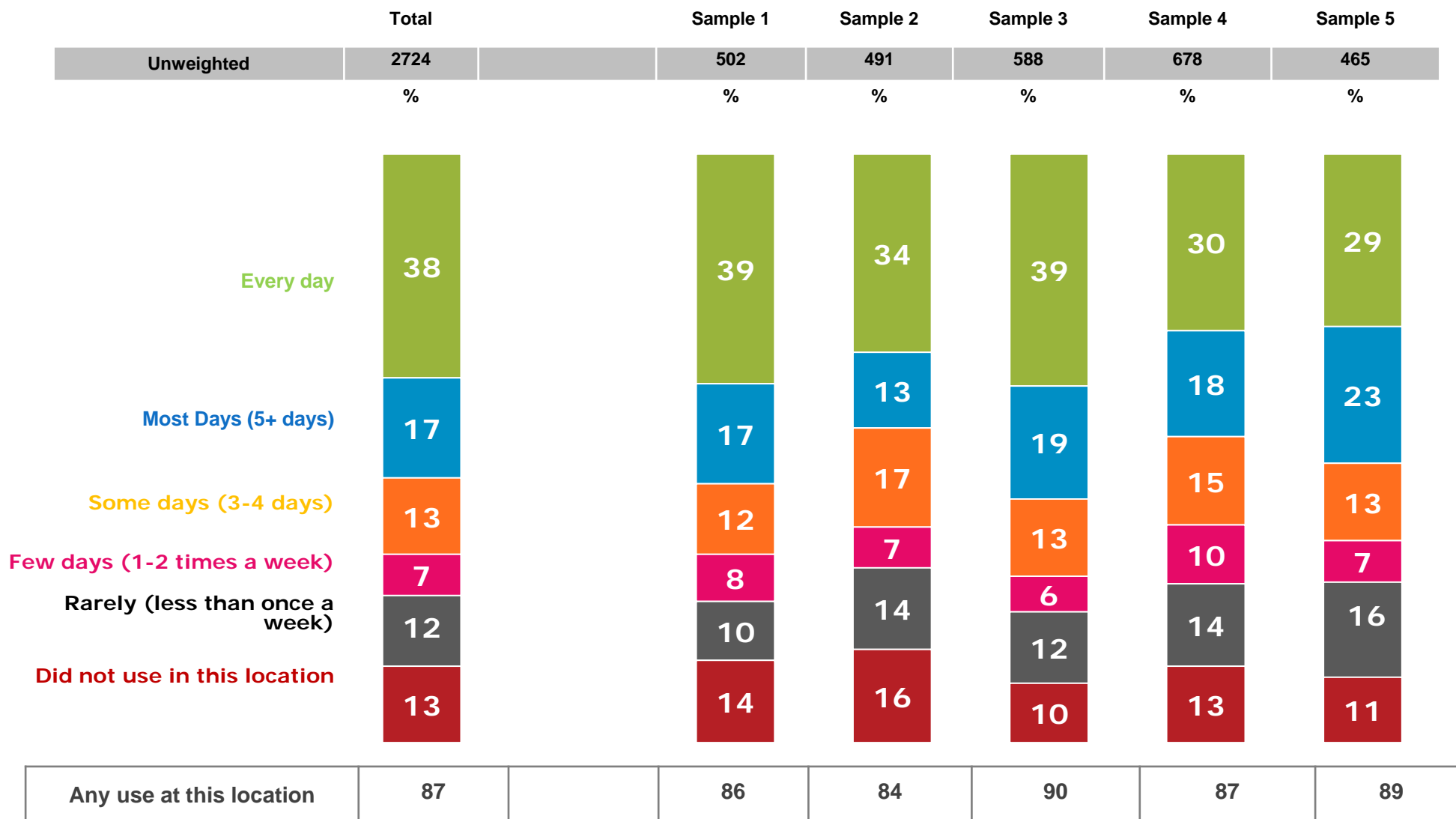
Base: All have mobile : n=2724



Q15 Thinking back on the past week, how often in the following locations, did you typically use your mobile for voice calls and texts on the operators network (i.e. not using wifi on bus, café, home etc.) ?

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

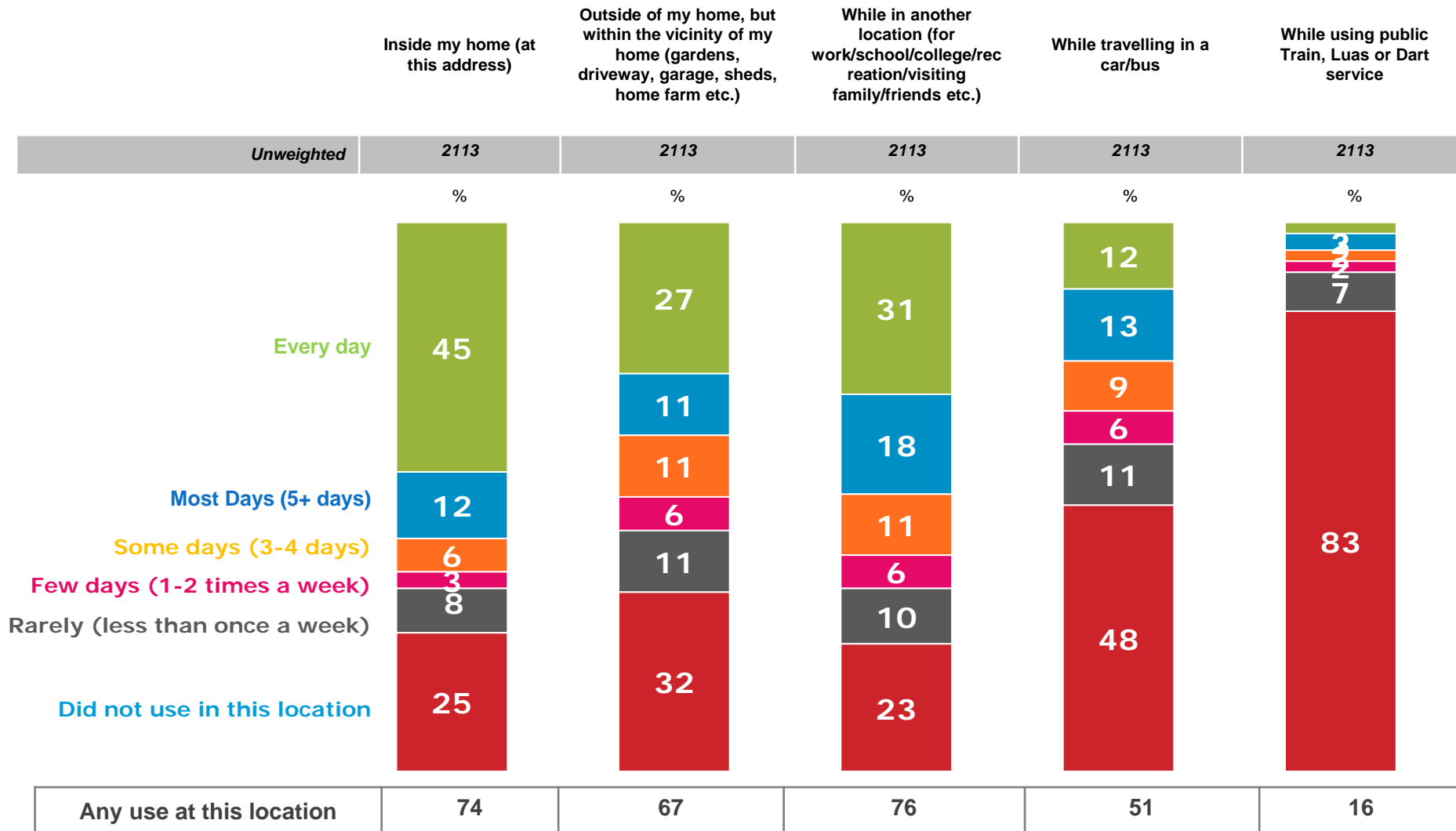
Base: All have mobile : n=2724



Q15 Thinking back on the past week, how often in the following locations, did you typically use your mobile for voice calls and texts on the operators network (i.e. not using wifi on bus, café, home etc.) ?

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

Base: All have smartphone : n=2113

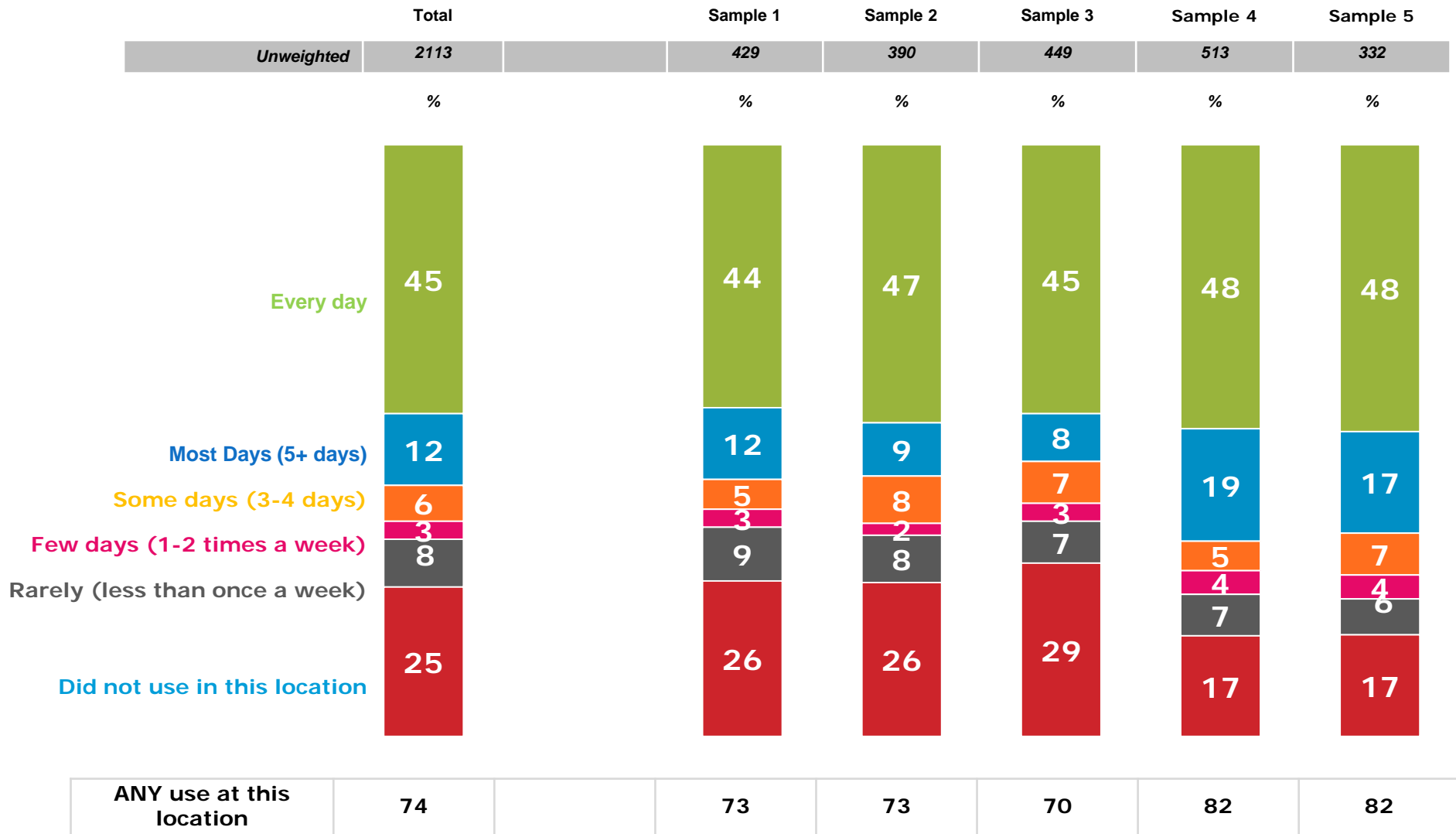


ONLY THOSE WITH A SMART PHONE AT Q.12 TO BE ASKED DATA QUESTIONS

Q.15a Thinking back on the past week, how often in the following locations, did you typically use your mobile for data (internet access) on the operators network (i.e. not using wifi on bus, café, home etc.) ?

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

Base: All have smartphone : n=2113

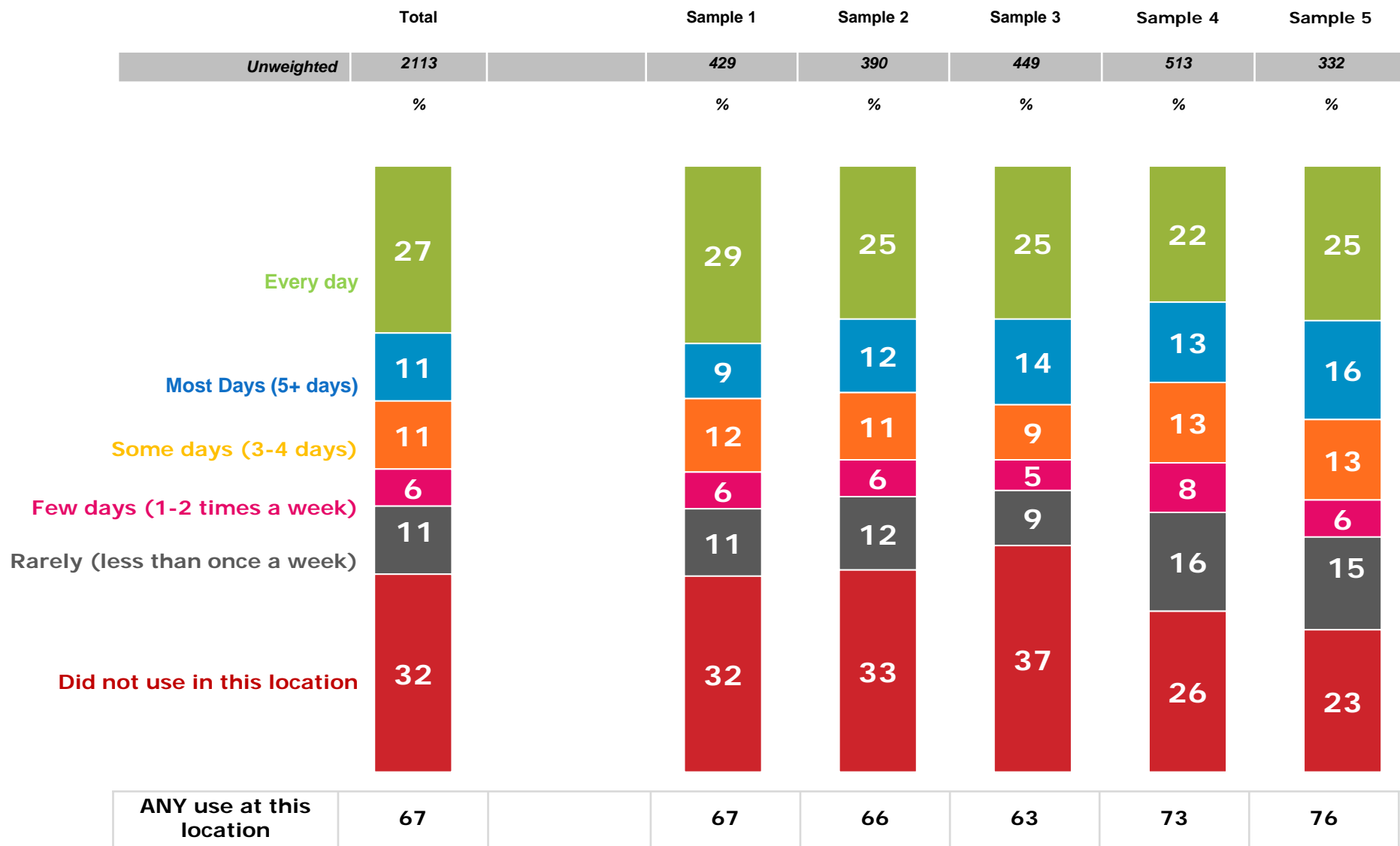


ONLY THOSE WITH A SMART PHONE AT Q.12 TO BE ASKED DATA QUESTIONS

Q.15a Thinking back on the past week, how often in the following locations, did you typically use your mobile for data (internet access) on the operators network (i.e. not using wifi on bus, café, home etc.) ?

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

Base: All have smartphone : n=2113



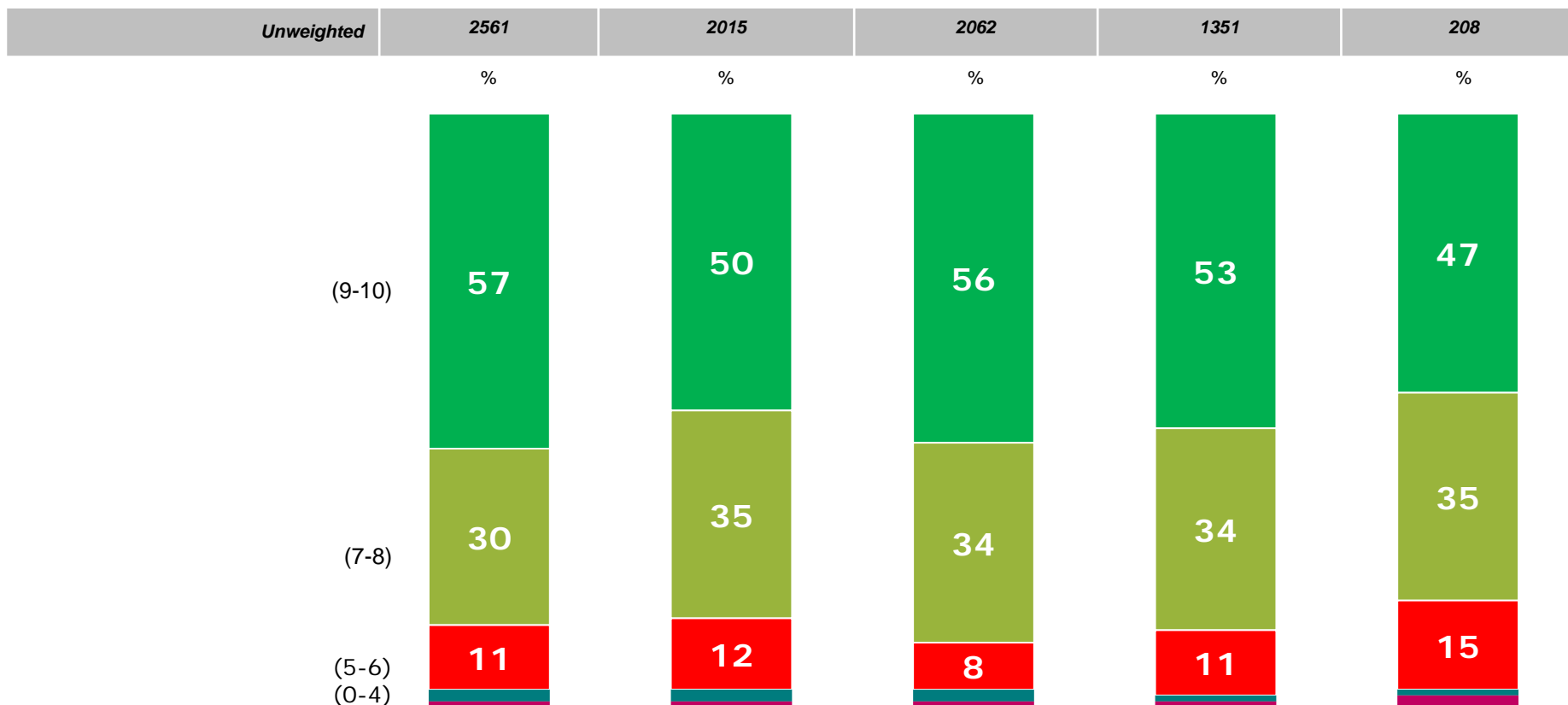
ONLY THOSE WITH A SMART PHONE AT Q.12 TO BE ASKED DATA QUESTIONS

Q.15a Thinking back on the past week, how often in the following locations, did you typically use your mobile for data (internet access) on the operators network (i.e. not using wifi on bus, café, home etc.) ?

Importance of mobile phone service when at various location

Base: All 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 in a car/bus While using public Train, Luas or Dart service



Mean	8.40	8.24	8.43	8.27	7.98
Median	9.00	9.00	9.00	9.00	8.00
Standard deviation	1.83	1.83	1.73	1.75	2.12



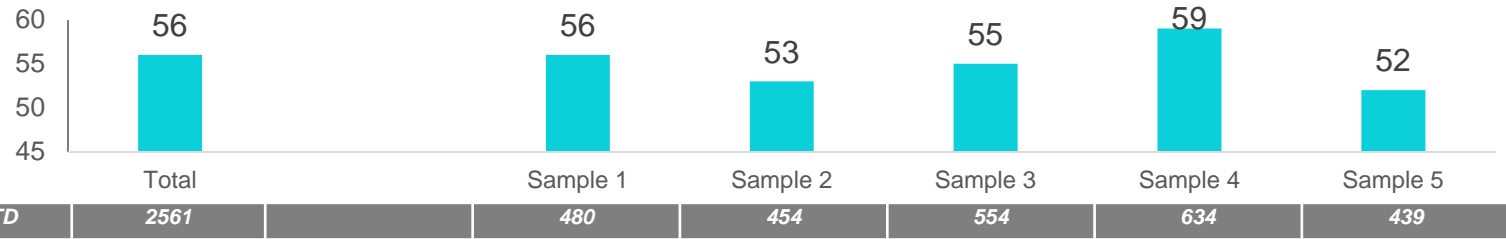
Q17 Thinking about your everyday use of your mobile phone, how important is your mobile phone service to you, when you are in the following places, or engaged in the following activities? Please use the scale on this (and where 0 = not really that important and 10 = it is critically important to me)

Importance of mobile phone service at various locations x segments

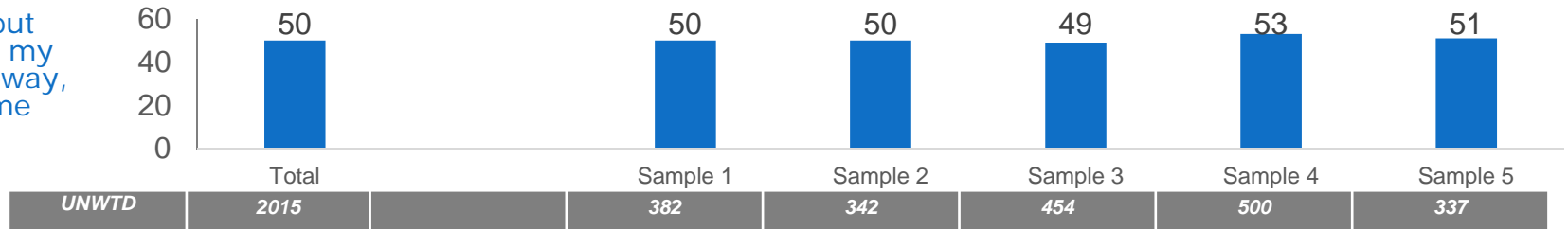
– 9-10 scores

Base: All use mobile at each location during past week

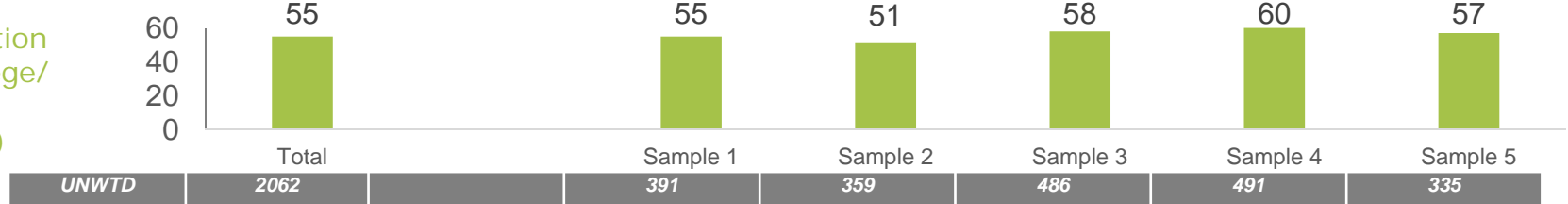
Inside my home (at this address)



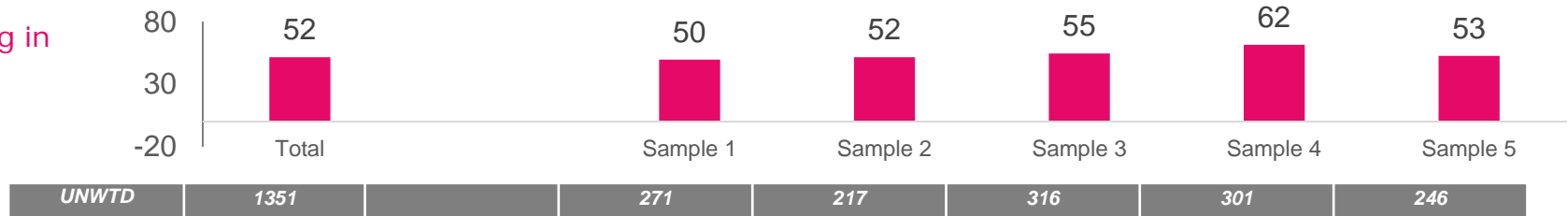
Outside my home but within the vicinity of my home (gardens, driveway, garage, sheds, home farm, etc.)



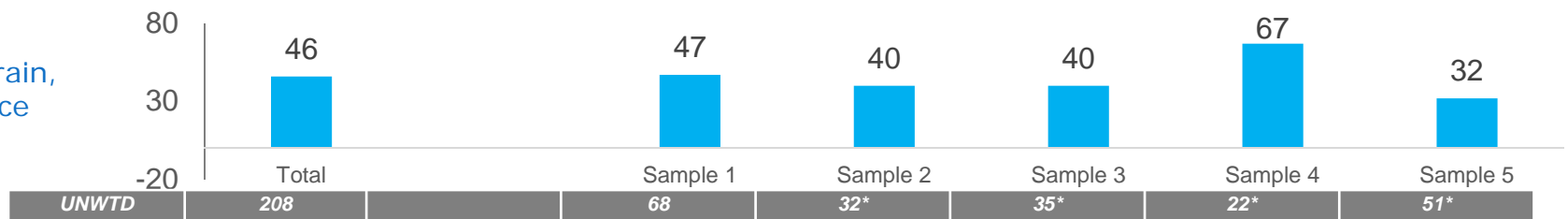
While in another location (for work/school/college/recreation/visiting family/friends etc.)



While travelling in a car/bus



While using public train, Luas or Dart service

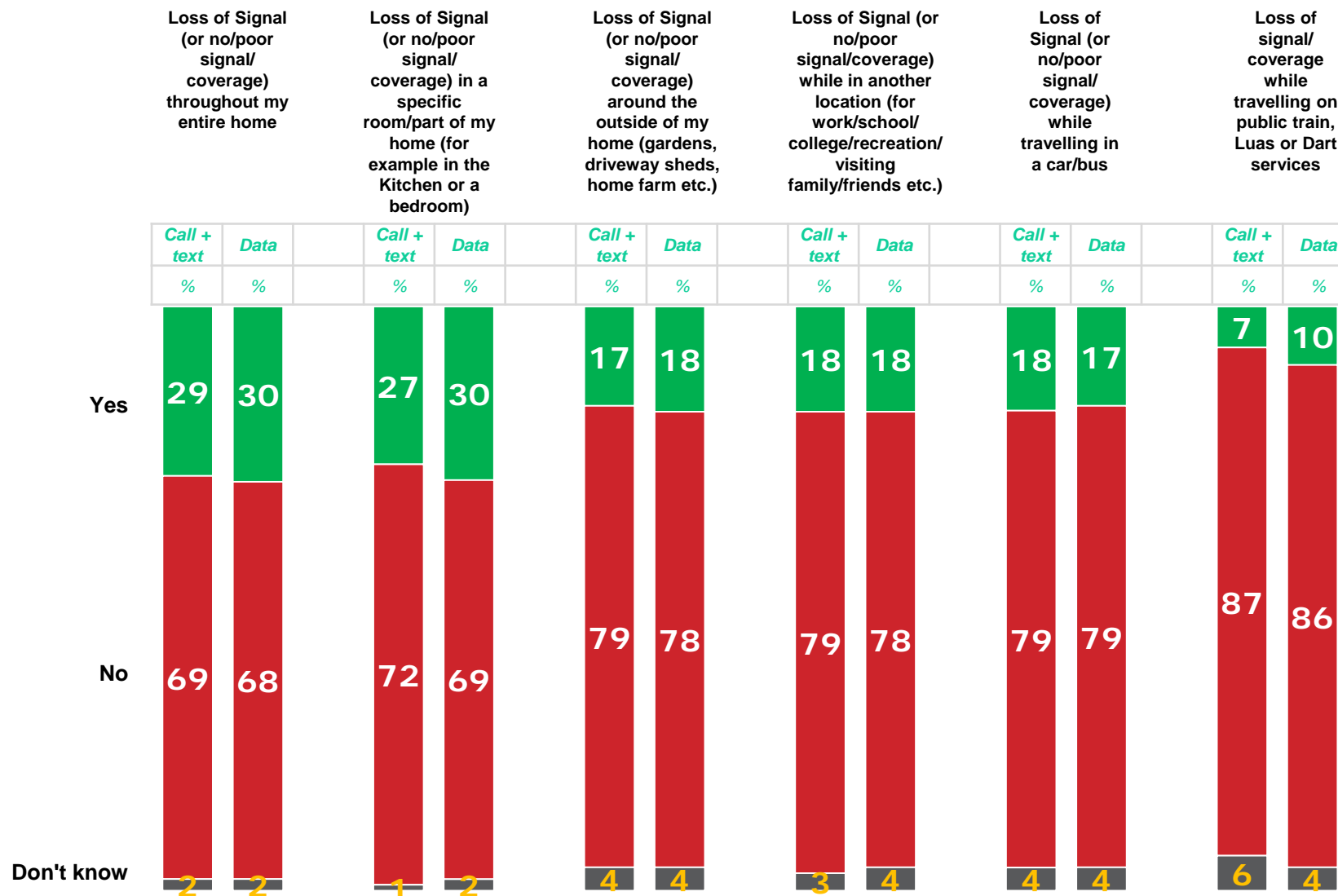


Q17 Thinking about your everyday use of your mobile phone, how important is your mobile phone service to you, when you are in the following places, or engaged in the following activities? Please use the scale on this (and where 0 = not really that important and 10 = it is critically important to me)

A landscape photograph showing rolling hills under a dramatic, cloudy sky. The foreground is filled with a dense field of bright yellow flowers. In the middle ground, a small village with several white buildings is nestled in a valley. The hills are covered in green grass and some trees. The sky is a mix of dark blue and white, with long, wispy clouds and a bright patch of light breaking through the center.

**Mobile coverage/signal
issues experienced**

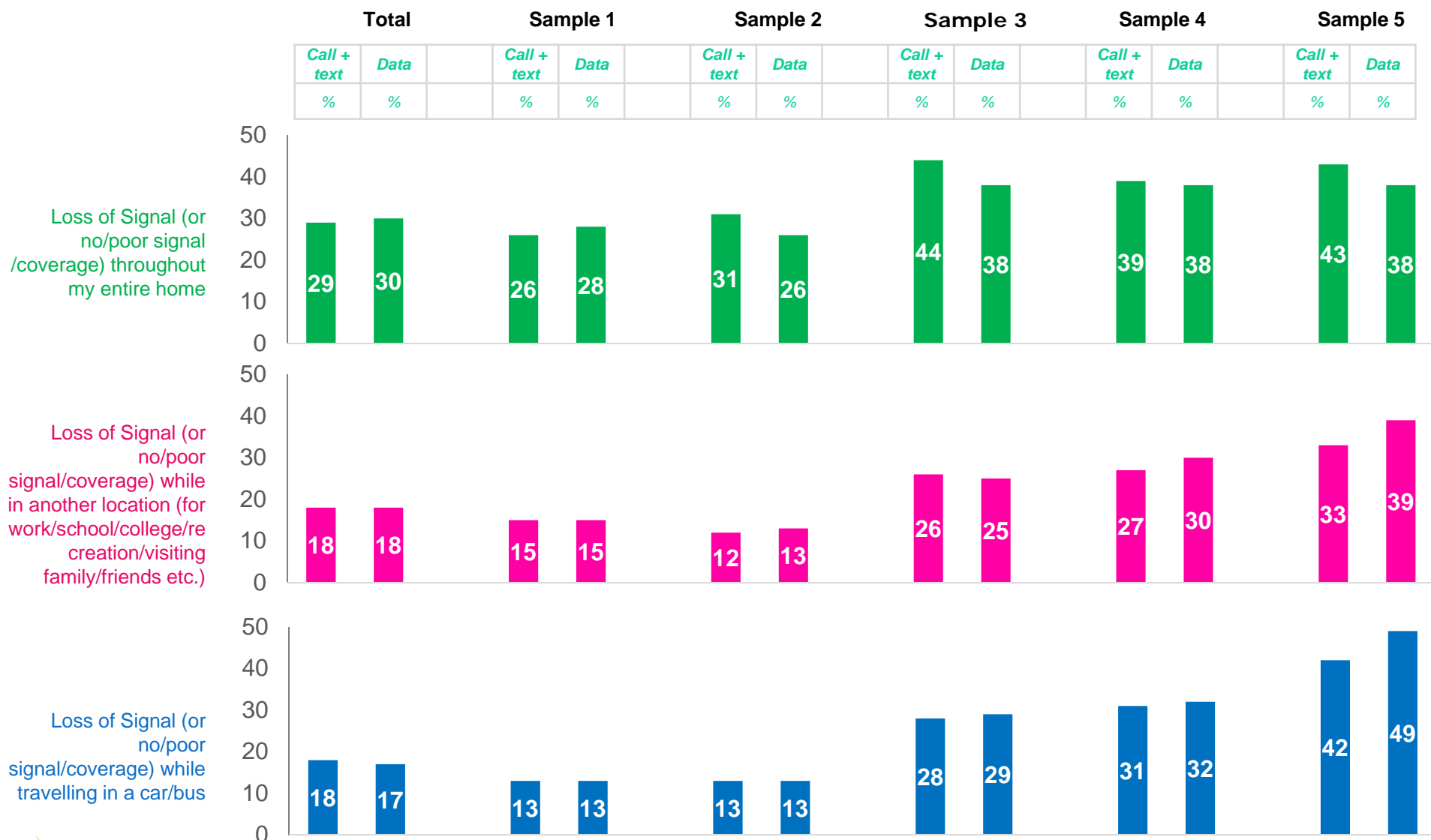
Incidence of experiencing various service issues for call + text and data during past month at particular location



Q.18a Thinking about your mobile phone experience over the past month, have you experienced the following voice call and texts

Q.18b Thinking about your mobile phone experience over the past month, have you experienced for data

Incidence of experiencing various service issues for call + text and data during past month at particular location X Segments - % Yes

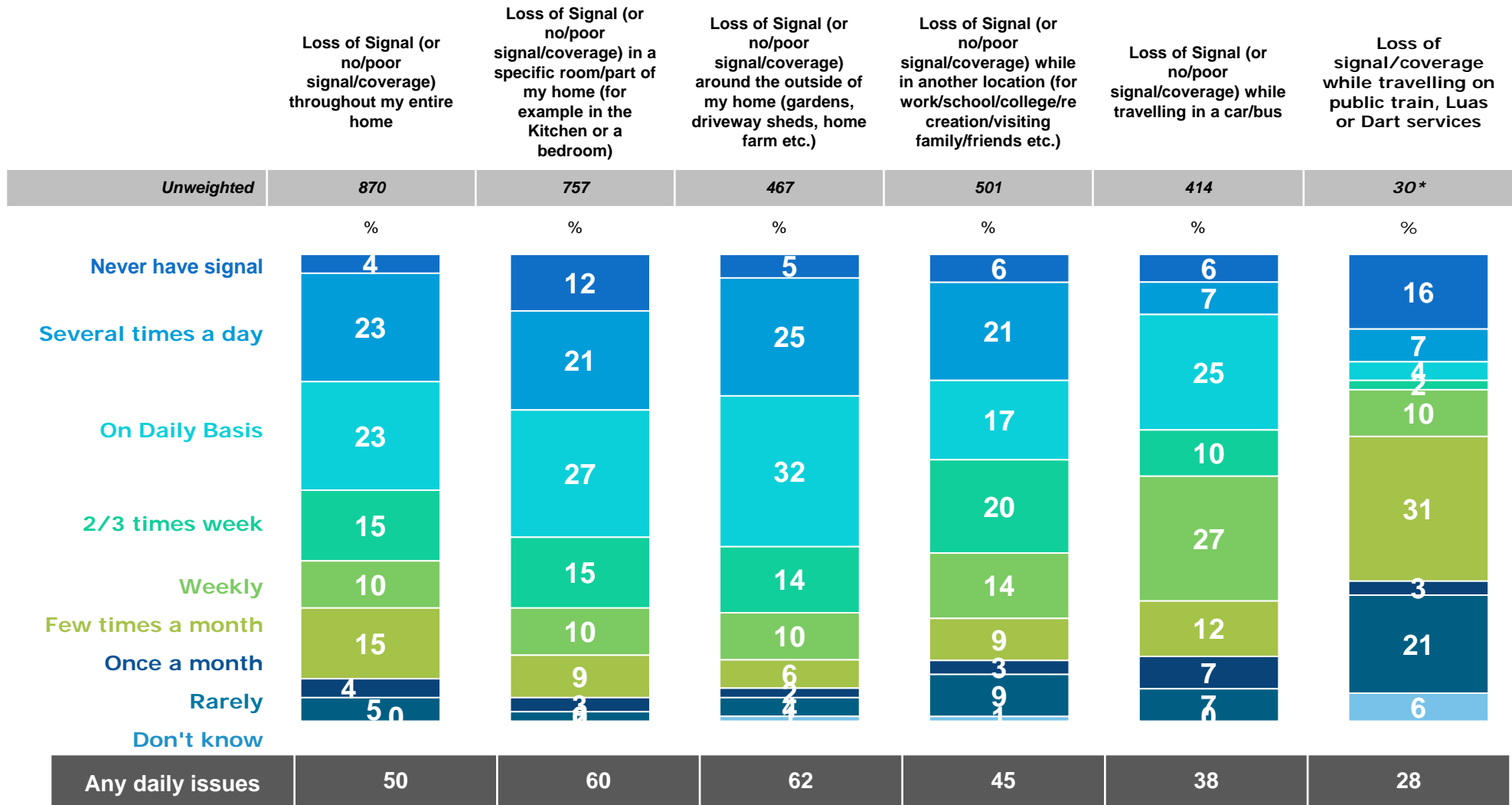


Q.18a Thinking about your mobile phone experience over the past month, have you experienced the following voice call and texts

Q.18b Thinking about your mobile phone experience over the past month, have you experienced for data

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

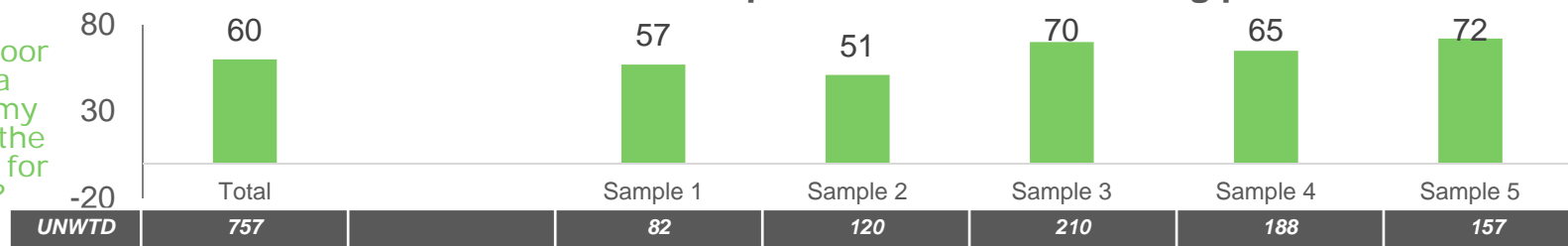
Base: All experienced service issues for voice calls and texts at particular locations during past week



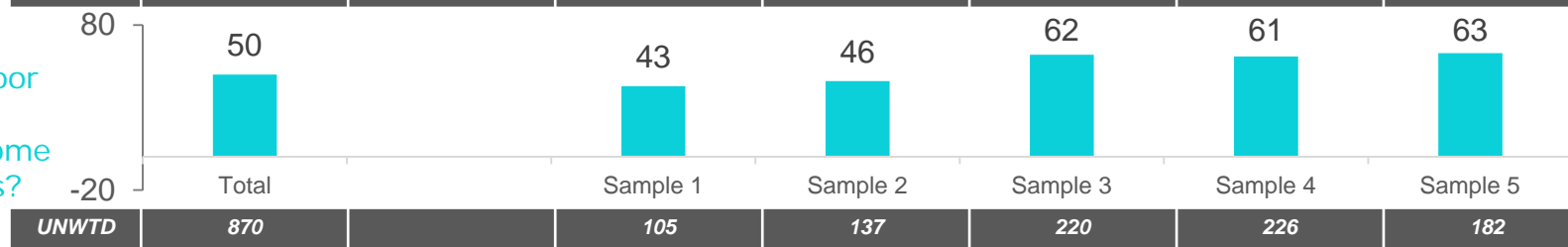
Frequency of experiencing various service issues for voice calls and texts at particular locations – Any daily issues

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

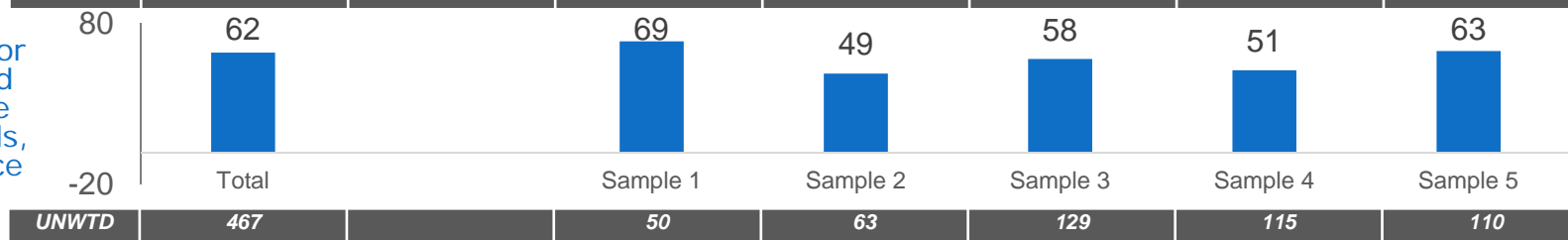
Loss of Signal (or no/poor signal/coverage) in a specific room/part of my home (for example in the Kitchen or a bedroom) for voice call and texts?



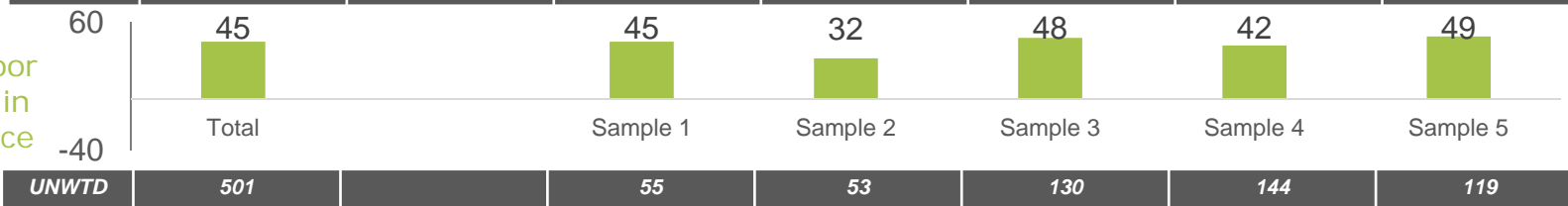
Loss of Signal (or no/poor signal/coverage) throughout my entire home for voice call and texts?



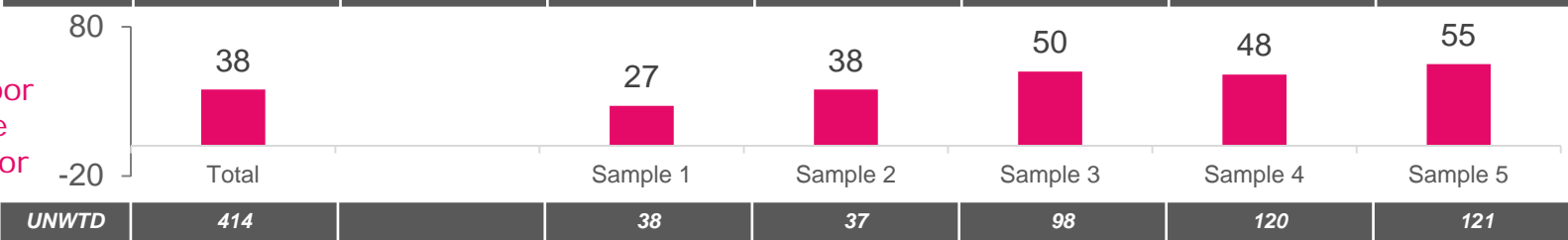
Loss of Signal (or no/poor signal/coverage) around the outside of my home (gardens, driveway sheds, home farm etc.) for voice call and texts?



Loss of Signal (or no/poor signal/coverage) while in another location for voice call and texts?

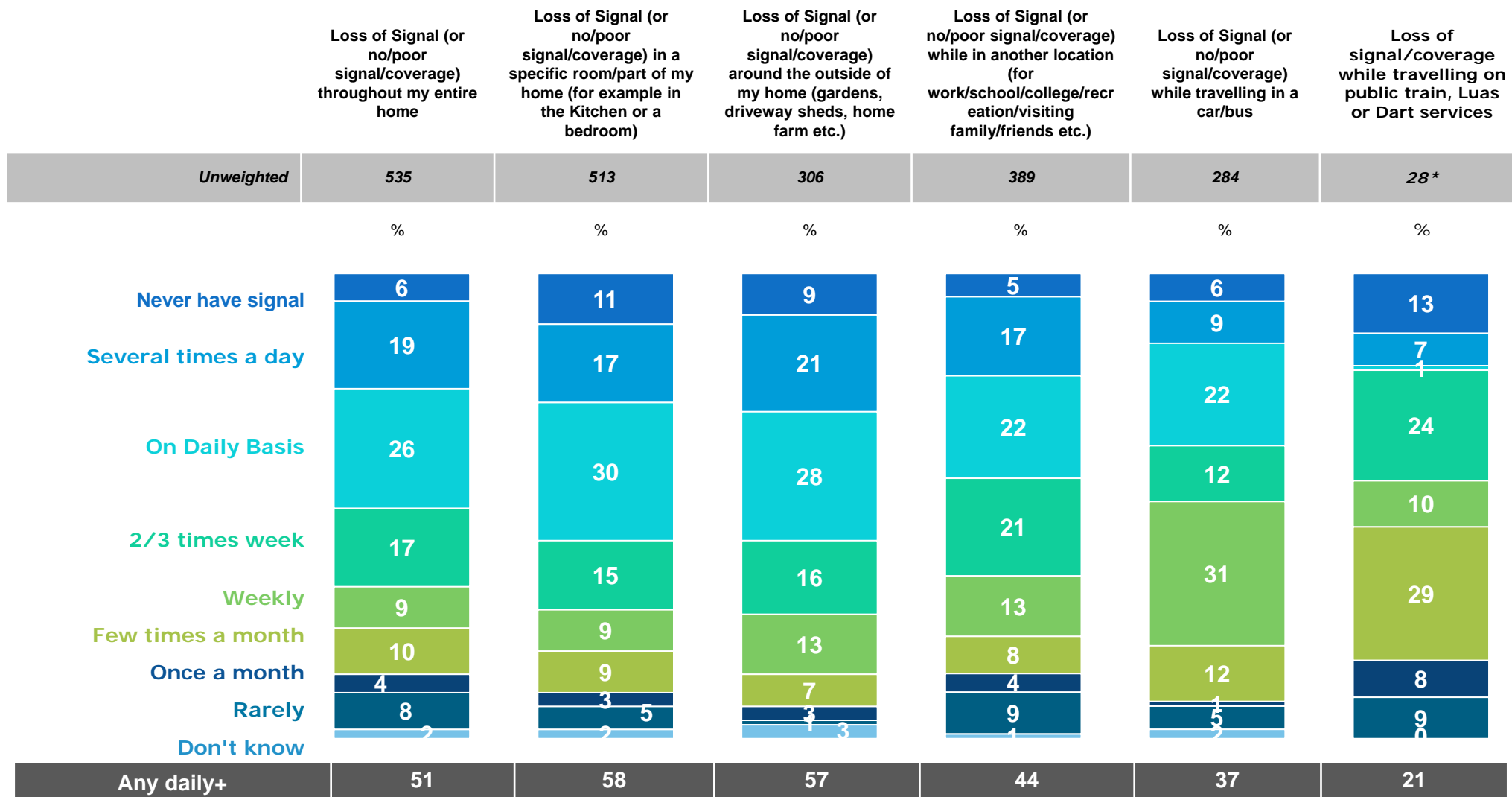


Loss of Signal (or no/poor signal/coverage) while travelling in a car/bus for voice call and texts?



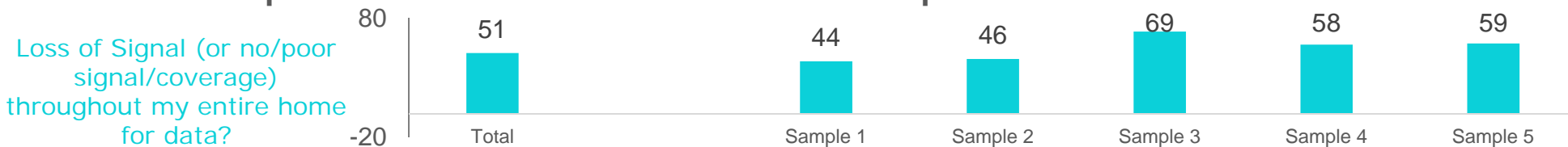
Frequency of experiencing various service issues for data during past month at particular locations

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

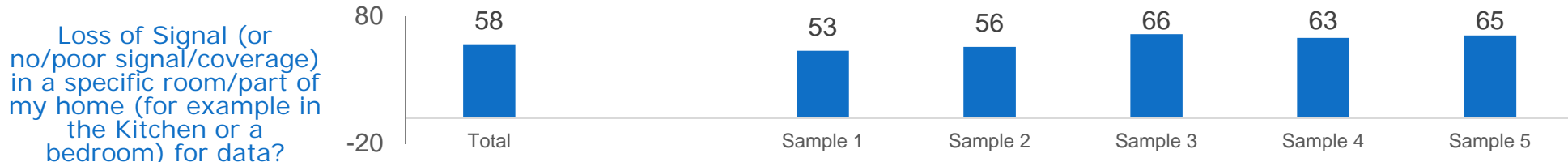


Frequency of experiencing various service issues for data during past month at particular locations x daily issues

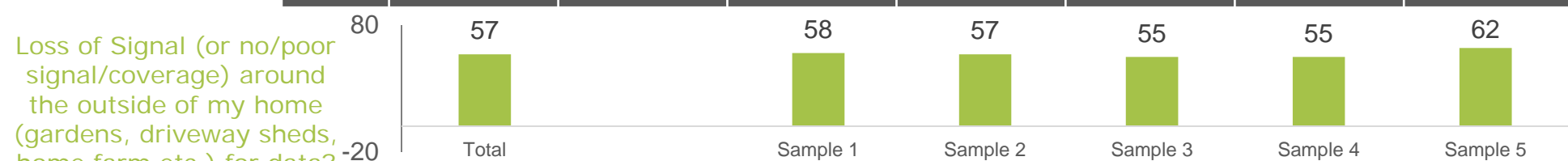
Base: All who experience service issues for mobile data at particular locations



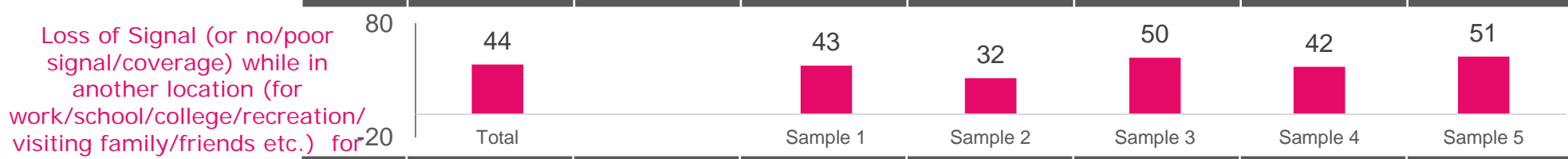
UNWTD	535	80	76	117	158	104
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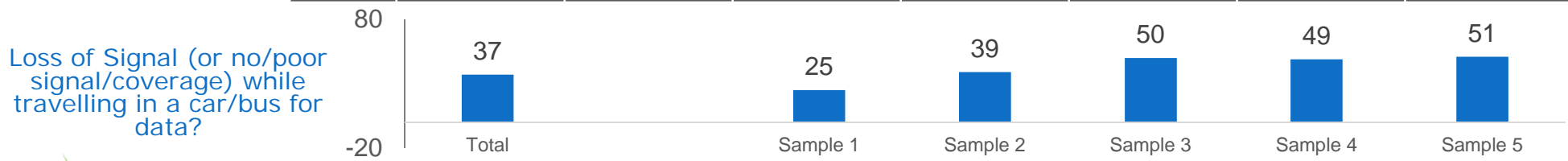
UNWTD	513	65	79	122	144	103
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UNWTD	306	36	39	69	86	76
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UNWTD	389	47	43	86	114	99
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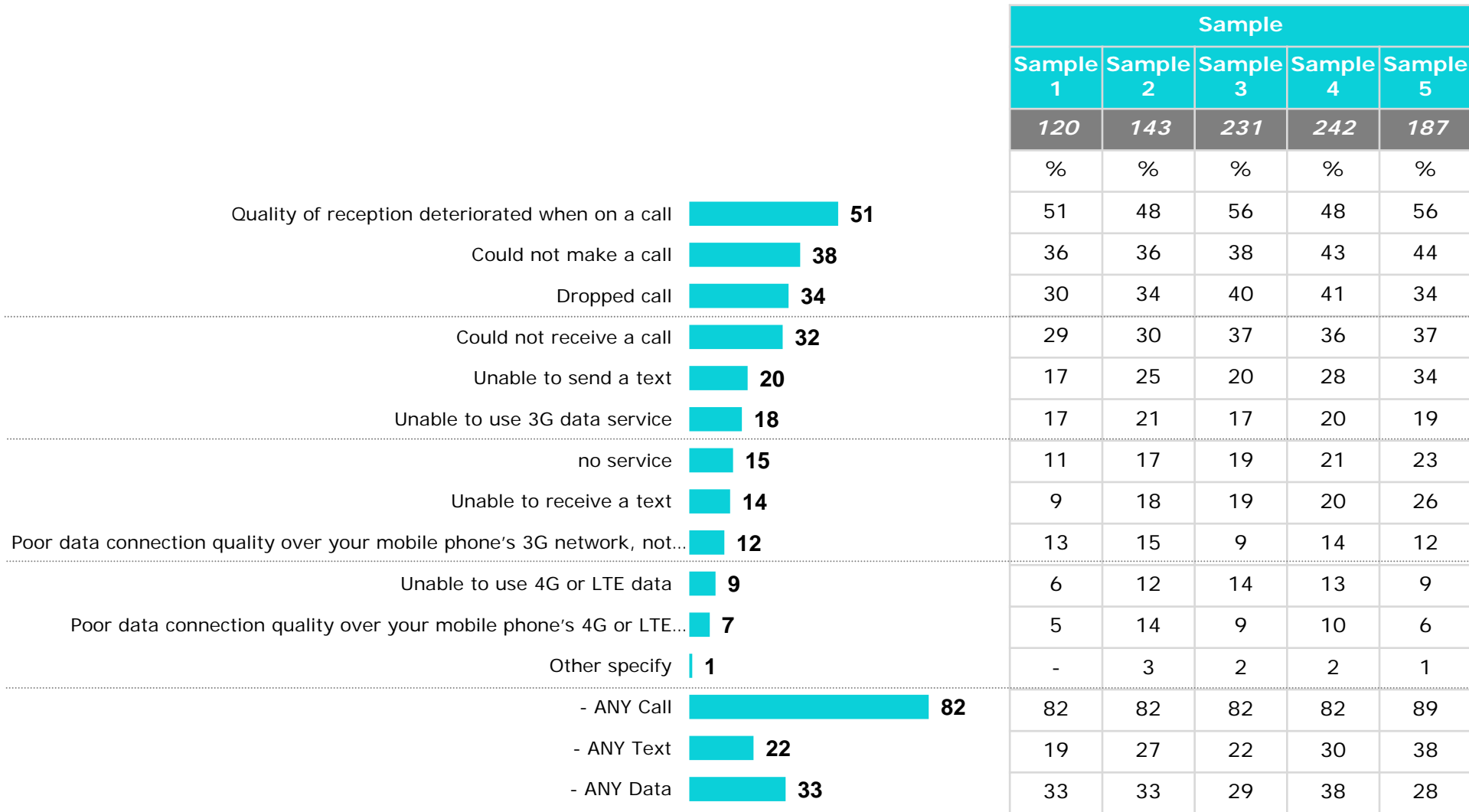


UNWTD	284	24*	25*	61	79	95
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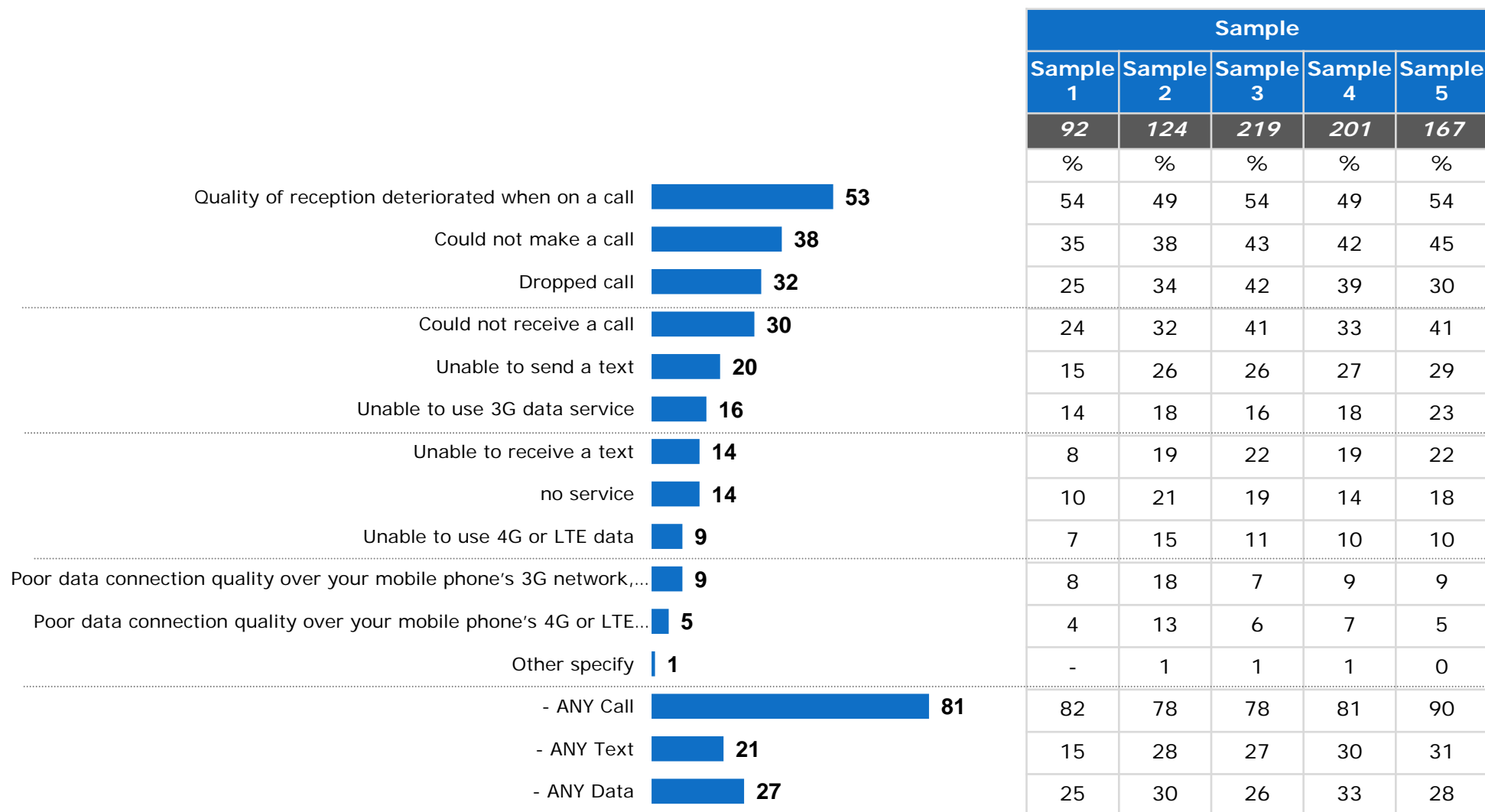
Service issues experienced during past month across voice and data - Loss of Signal (or no/poor signal/coverage) throughout my entire home

Base: All who experienced loss of signal throughout entire home for voice or data during past month - 923



Service issues experienced during past month across voice and data - Loss of Signal (or no/poor signal/coverage) in a specific room/part of my home (for example in the Kitchen or a bedroom).

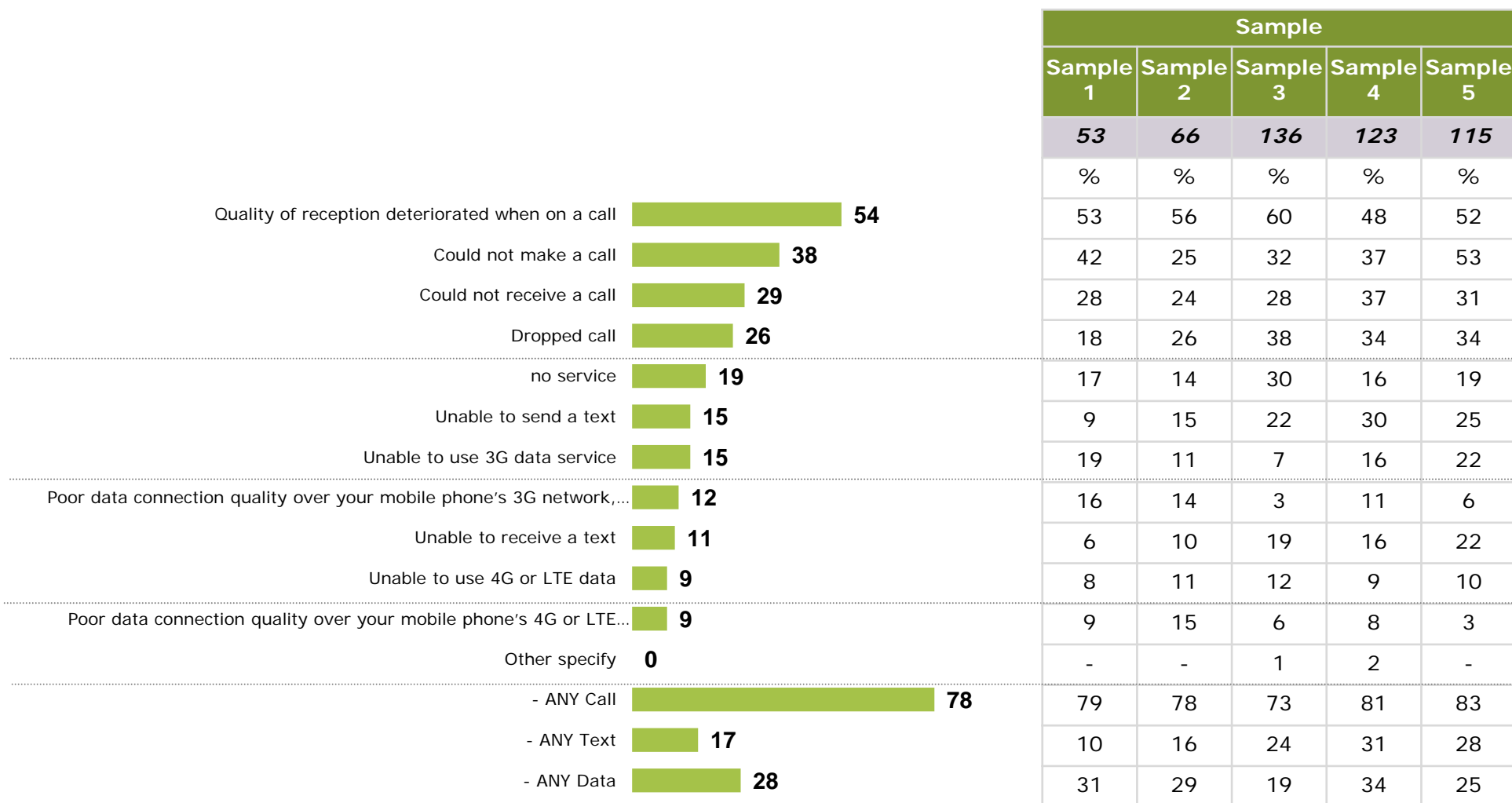
Base: All who experienced loss of signal in a specific room/part of home for voice or data over past month - 803



Q.20a You said that you experienced in the last month for voice calls and text. What did you experience?

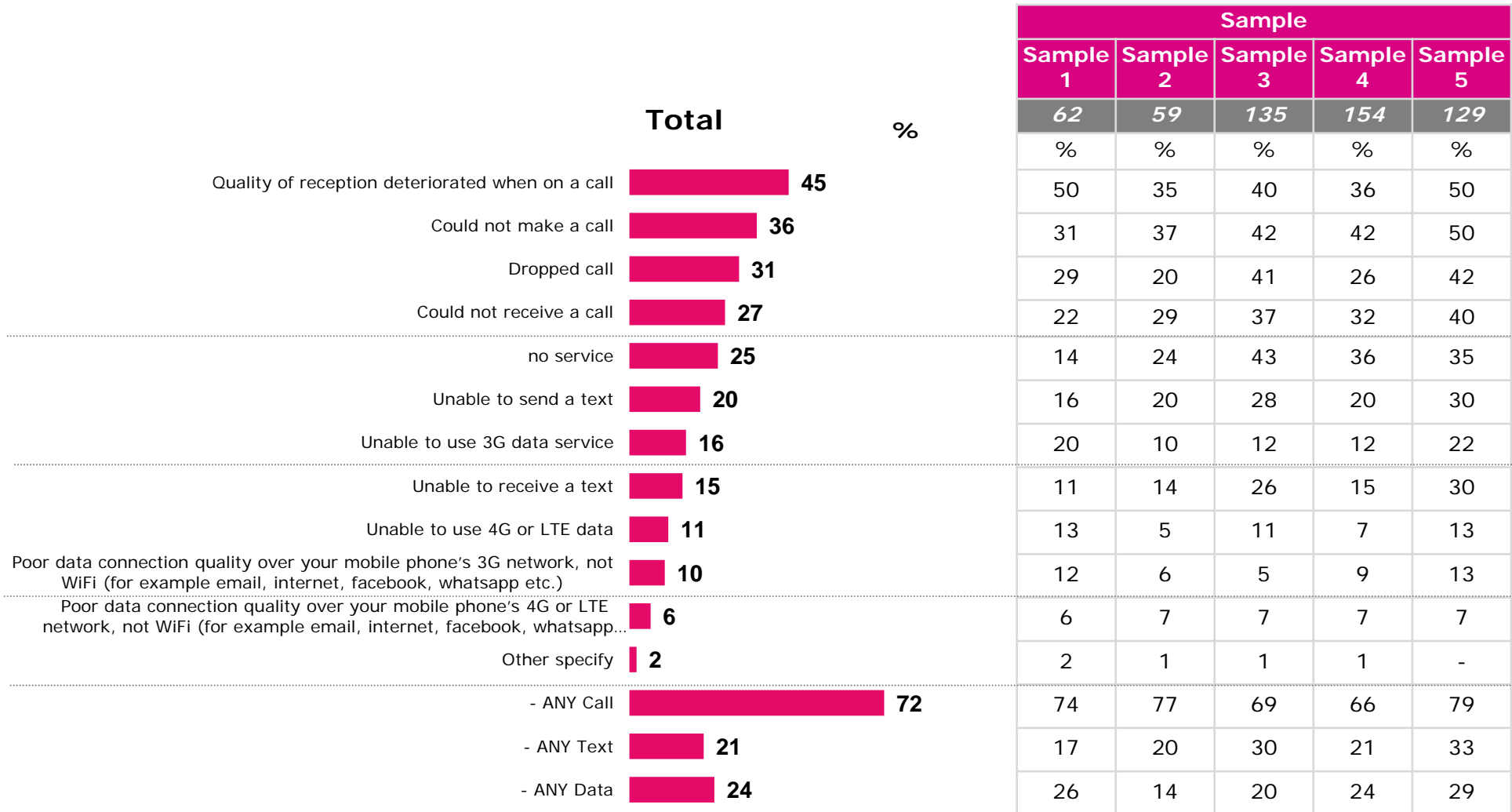
Service issues experienced during past month across voice and data - Loss of Signal (or no/poor signal/coverage) around the outside of my home (gardens, driveway sheds, home farm etc.)

Base: All who experienced loss of signal around outside of home for voice or data - 493



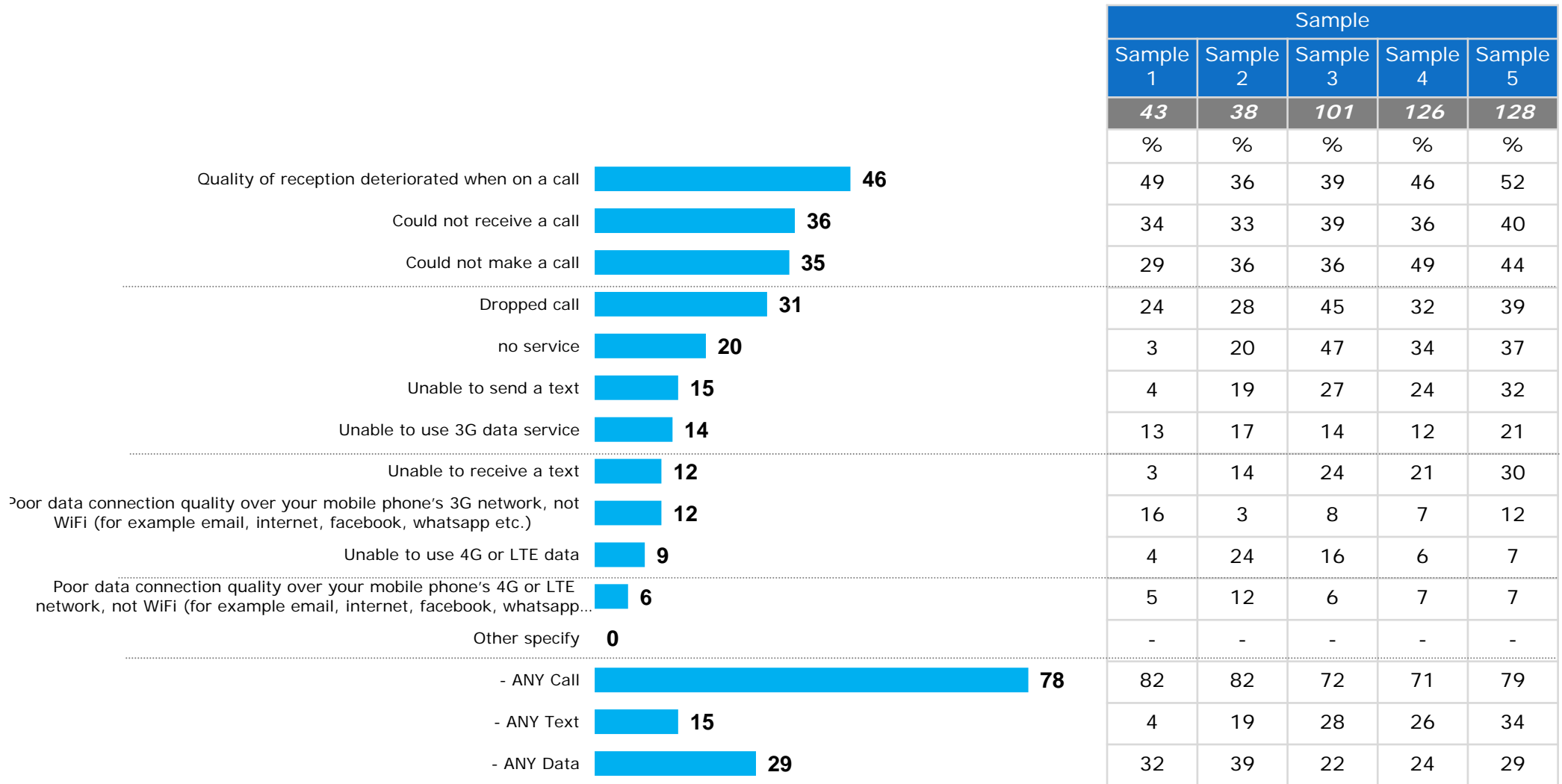
Service issues experienced during past month across voice and data - Loss of Signal (or no/poor signal/coverage) while in another location (for work/school/college/recreation/visiting family/friends etc.)

Base: All who experienced loss of signal while at another location - 539



Service issues experienced during past month across voice and data - Loss of Signal (or no/poor signal/coverage) while travelling in a car/bus

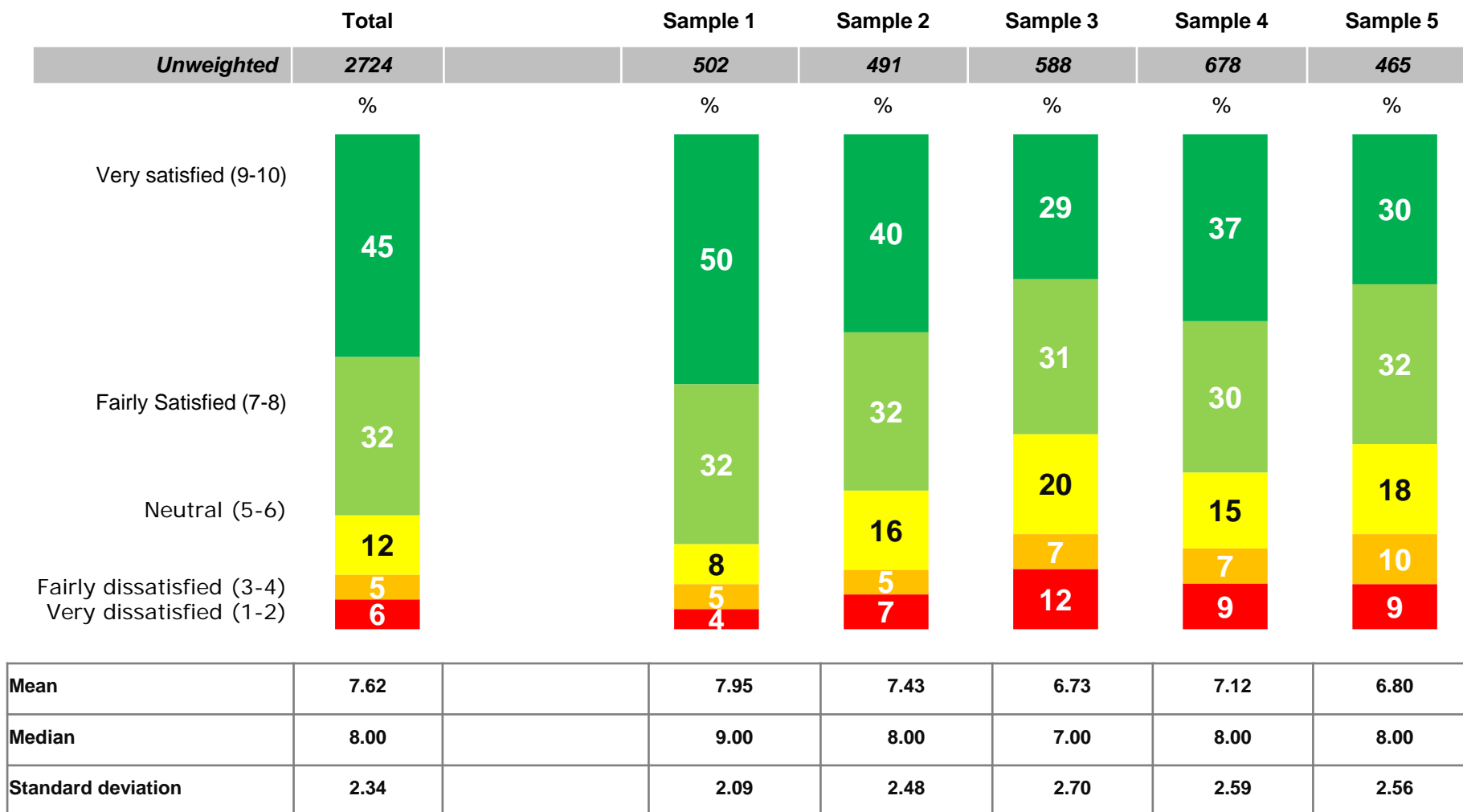
Base: All who experienced loss of signal while travelling in a car/bus for voice or data- 436



Q.20a You said that you experienced in the last month for voice calls and text. What did you experience?

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

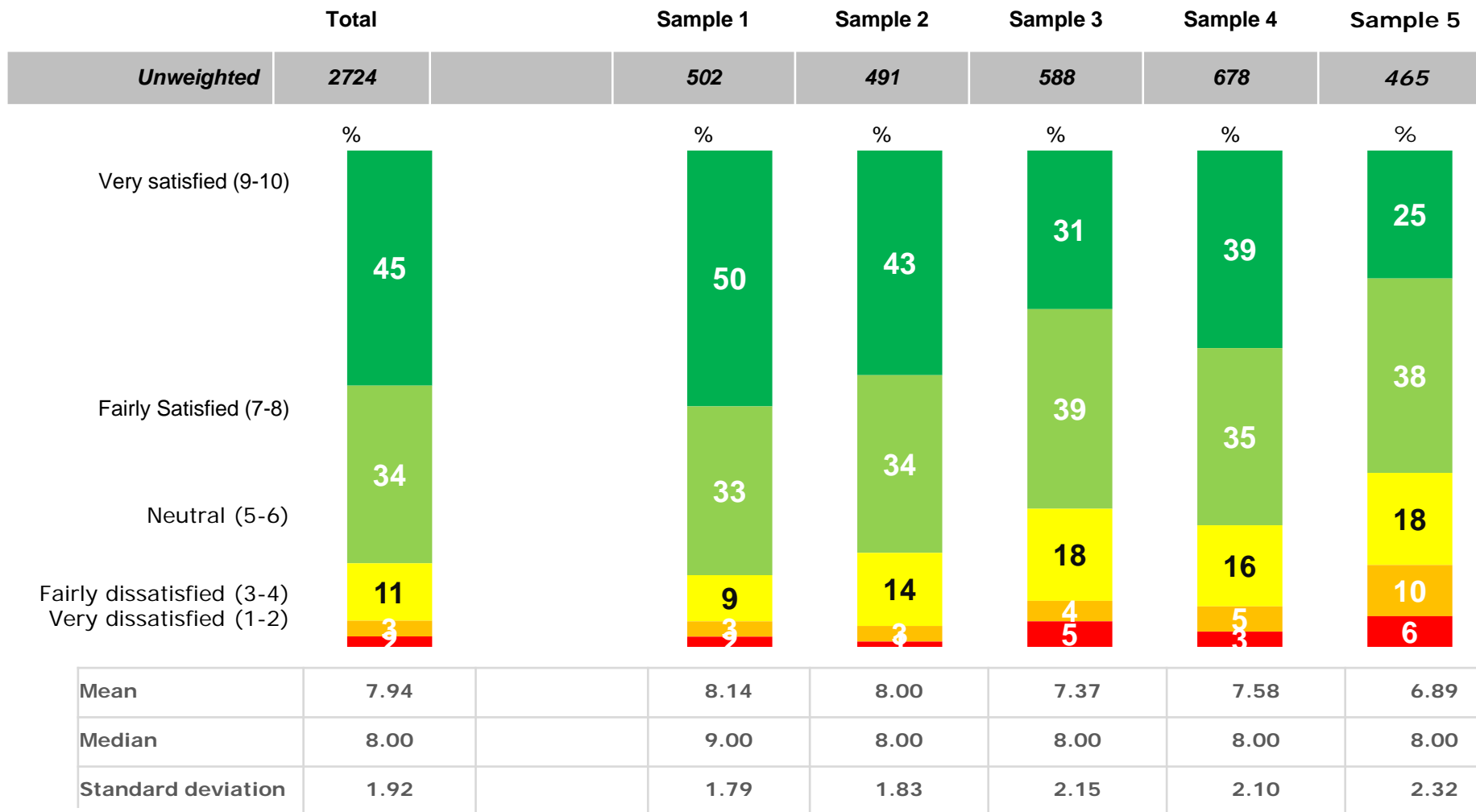
Base: All have mobile



Q.21 Out of 10, where 1 is very dissatisfied and 10 is very satisfied, how satisfied are you with your mobile phone network's coverage where you live (i.e. at home)?

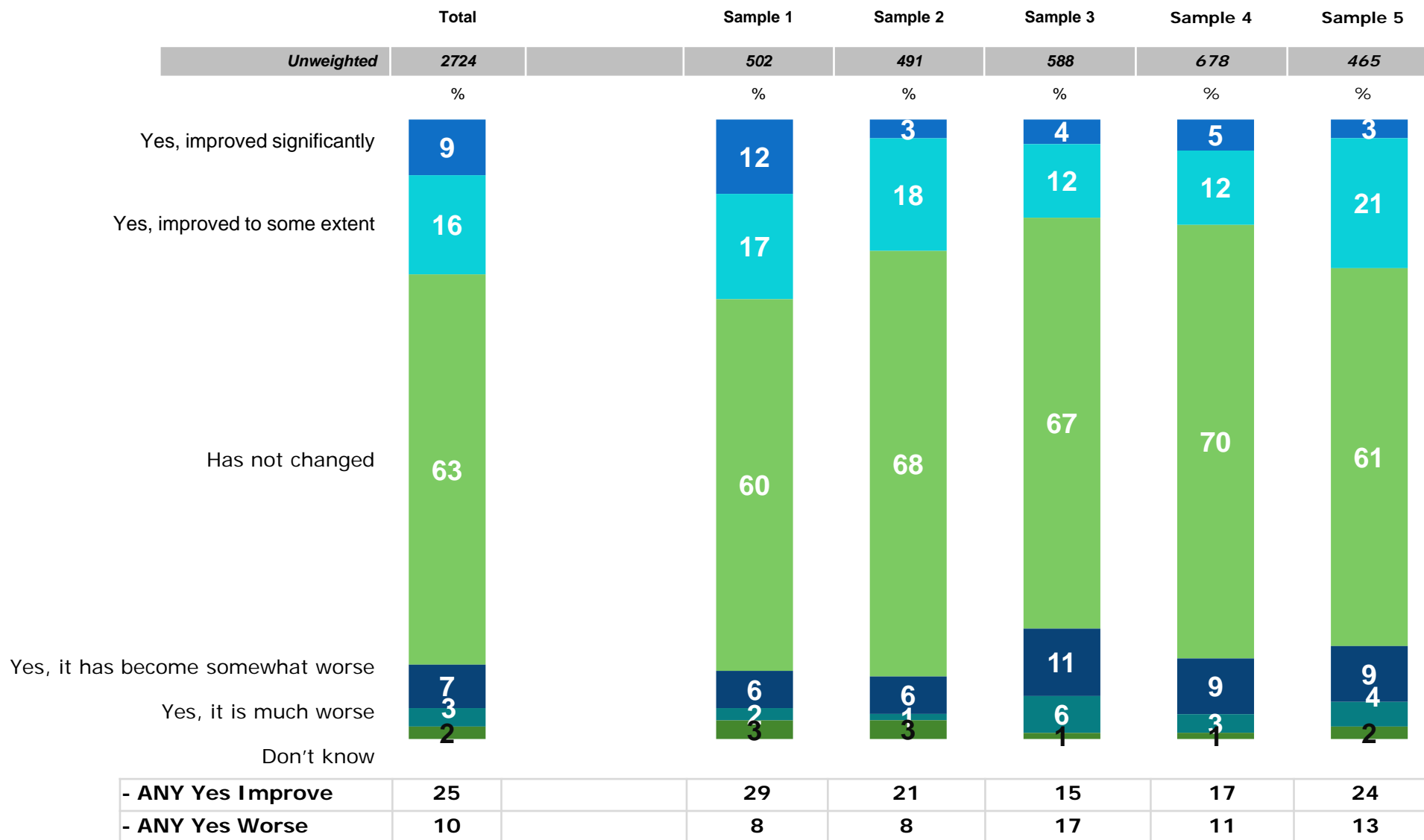
Satisfaction with mobile phone network's coverage in other areas you visit/travel

Base: All have mobile: 2724



Mobile phone coverage experience over the last year

Base: All have mobile

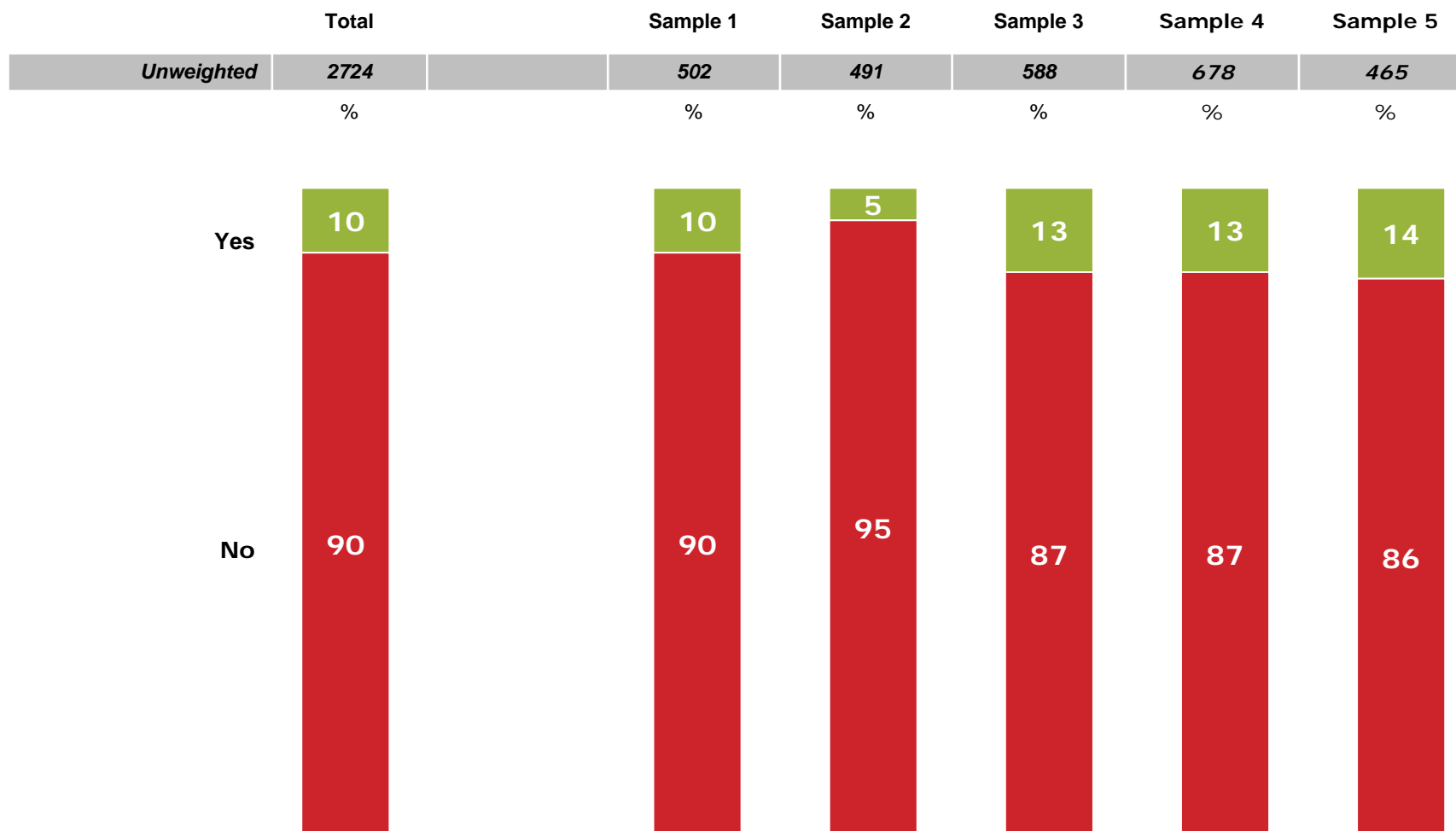


Mobile handset impact on network signal



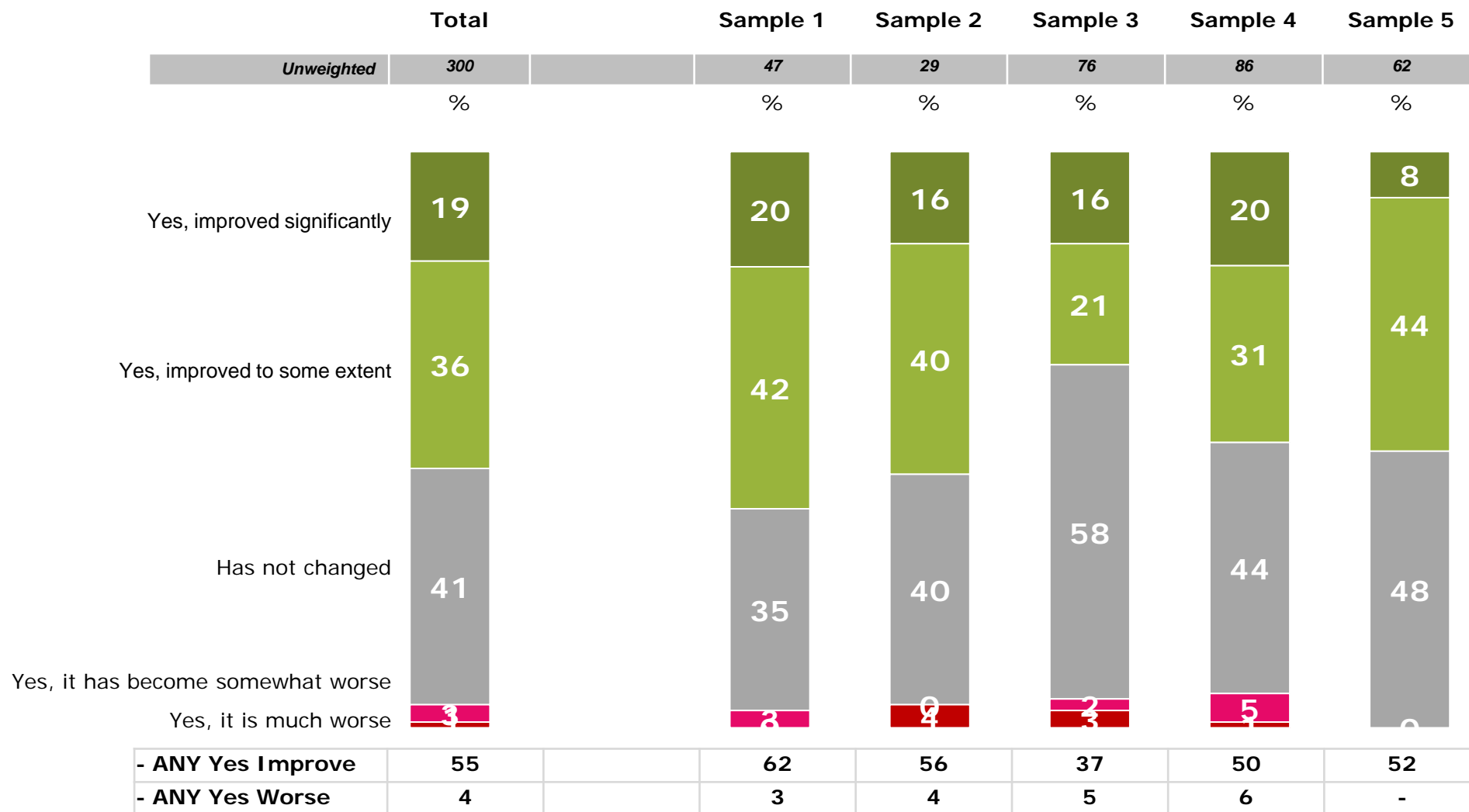
Incidence of changing handset due to mobile phone coverage or signal problems x Segments

Base: All have mobile



Incidence of handset change improving mobile coverage experience x Segments

Base: All changed mobile phone



*Caution small base



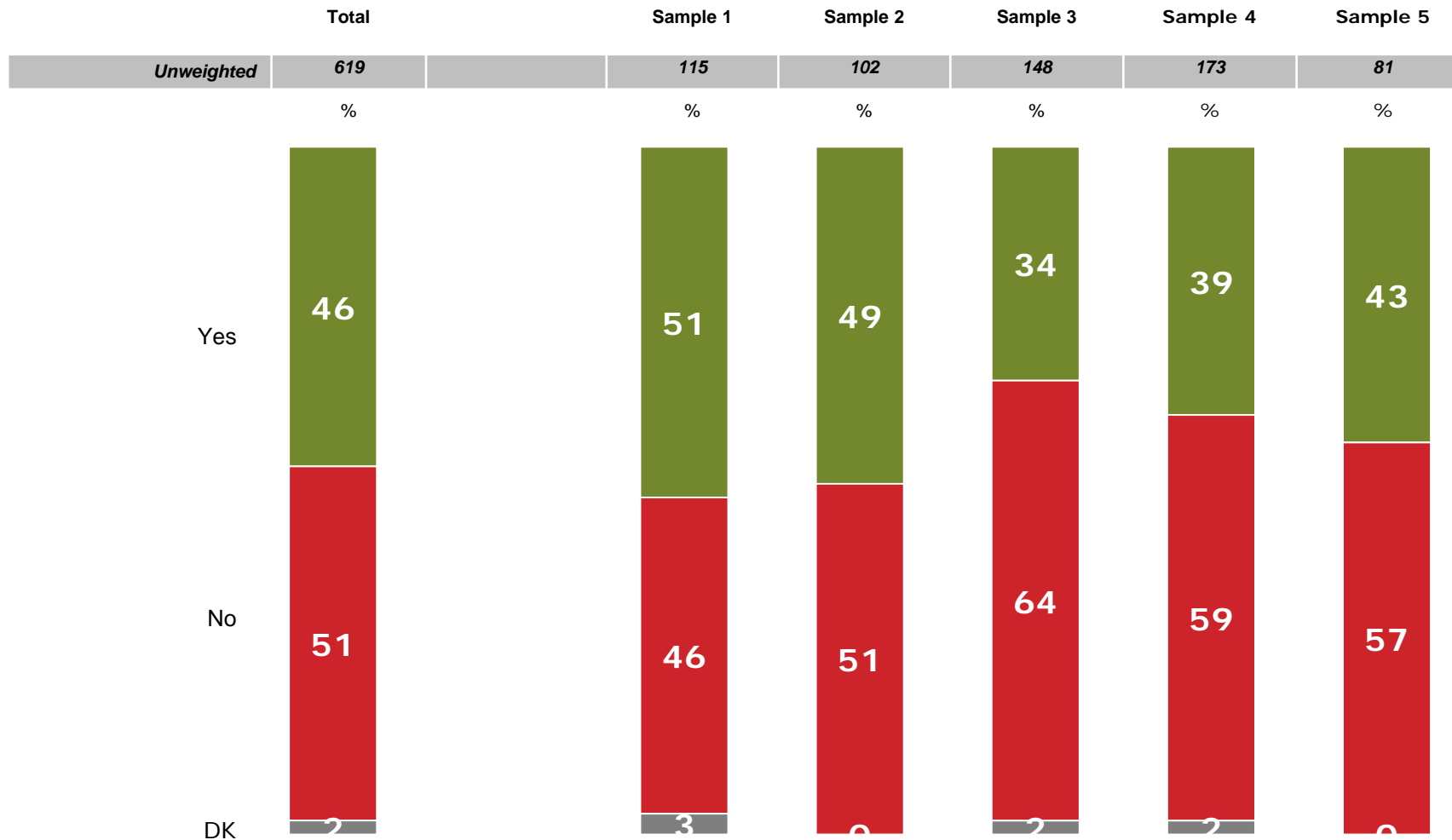
Incidence of ever changing network provider (for whatever reason) x Segments

Base: All have mobile : 2724



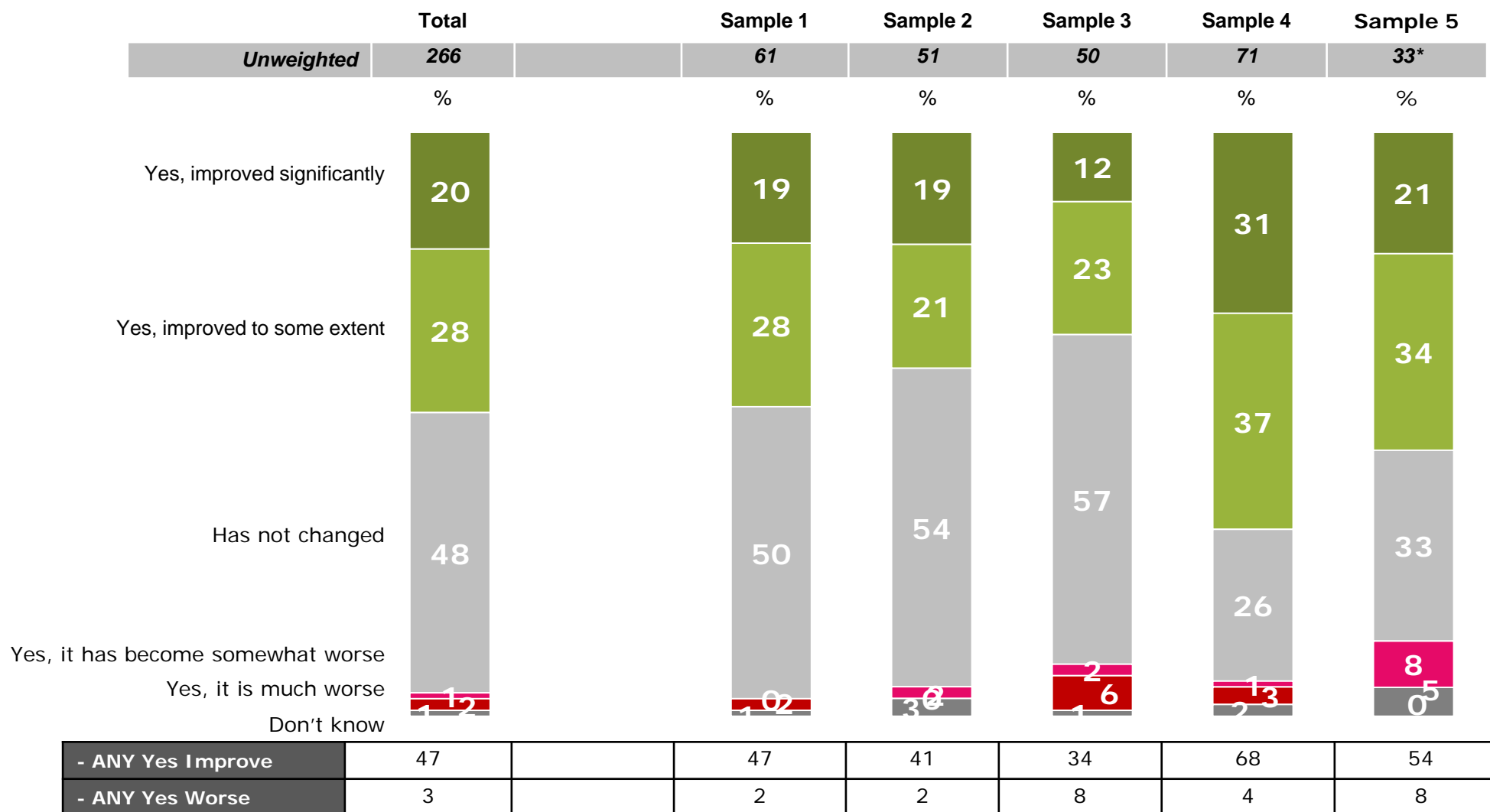
Incidence of keeping mobile phone handset when you switched x Segments

Base: All ever changed network provider: n=619



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

Base: All changed network provider but kept mobile

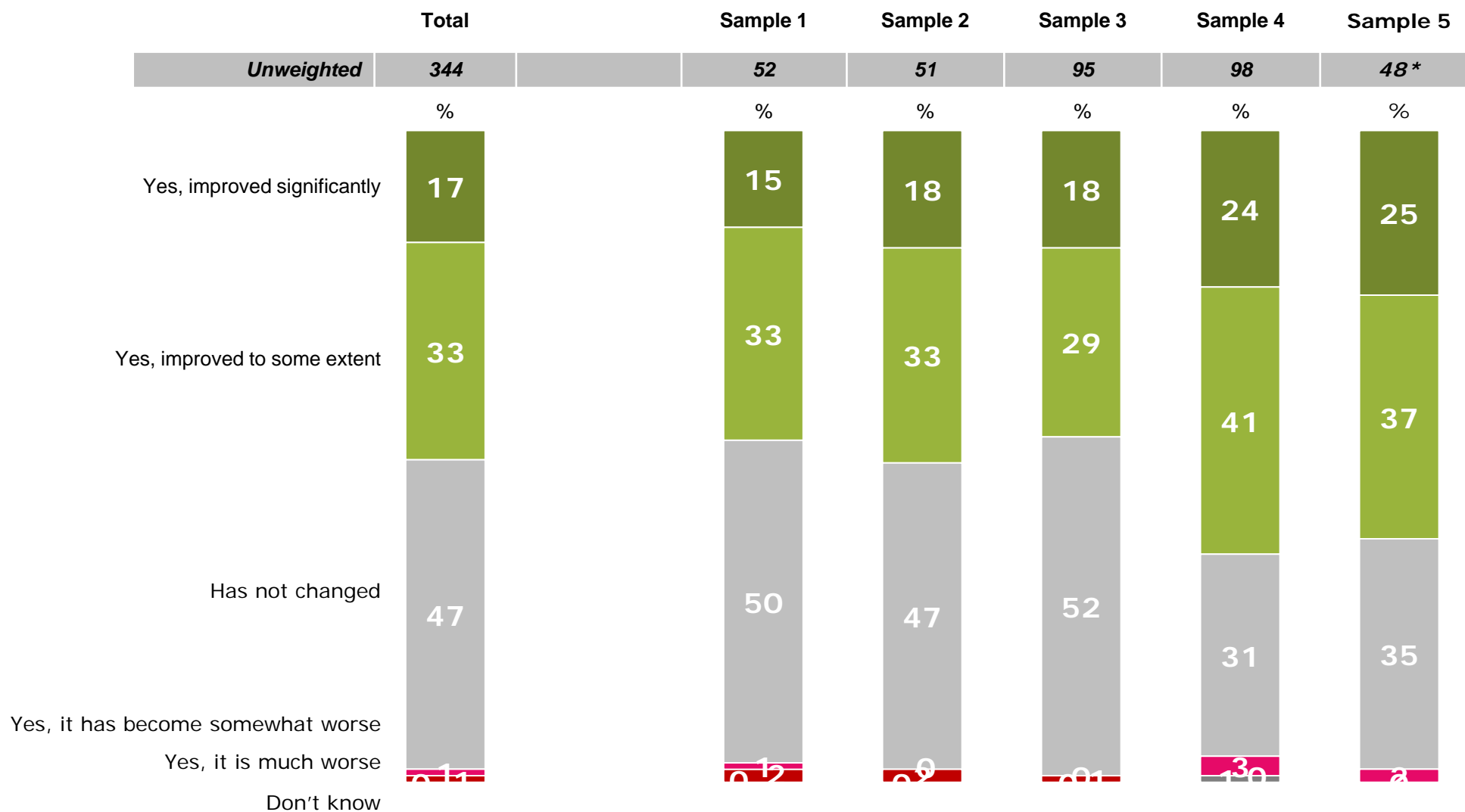


*Caution small base



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

Base: All changed network provider and mobile handset



*Caution small base



Impact of handset WiFi service on internet access experience

Base: All with smartphone: n=2084



Willingness to Pay for reliable signal/ coverage



Willingness to pay any additional amount each month to receive a reliable signal and coverage x sample

Base: All have mobile n=2724



Likelihood of switching to new network offering reliable signal/coverage if costs were the same as current package x sample

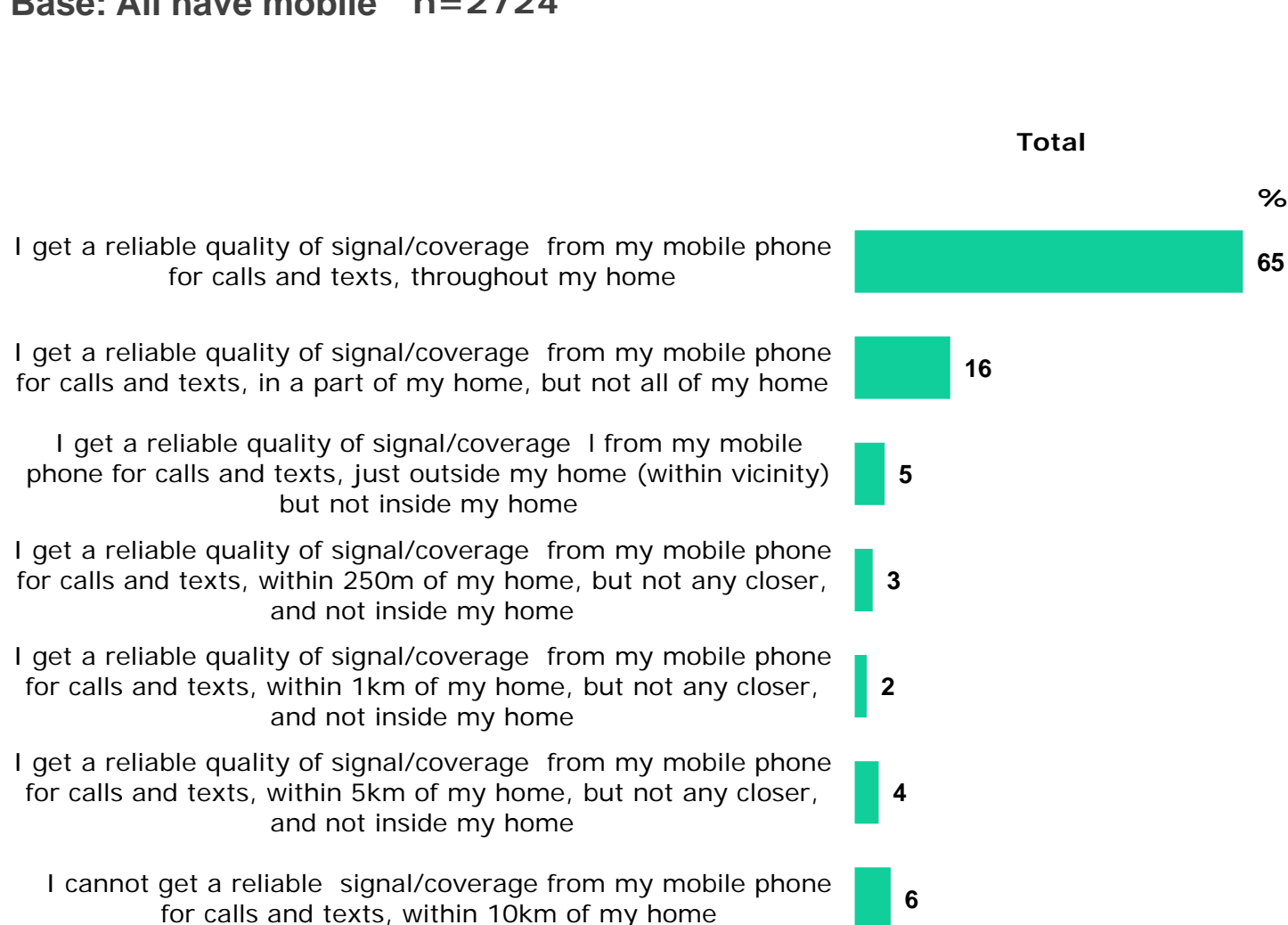
Base: All have mobile n=2724



Q37 If a new (hypothetical) national mobile phone network was established, offering a reliable quality of signal / coverage (i.e. where calls and texts were not dropped), would you switch to this new network if the costs were the same as your current package?

Mobile phone coverage experience for calls and texts at home over the last month x sample

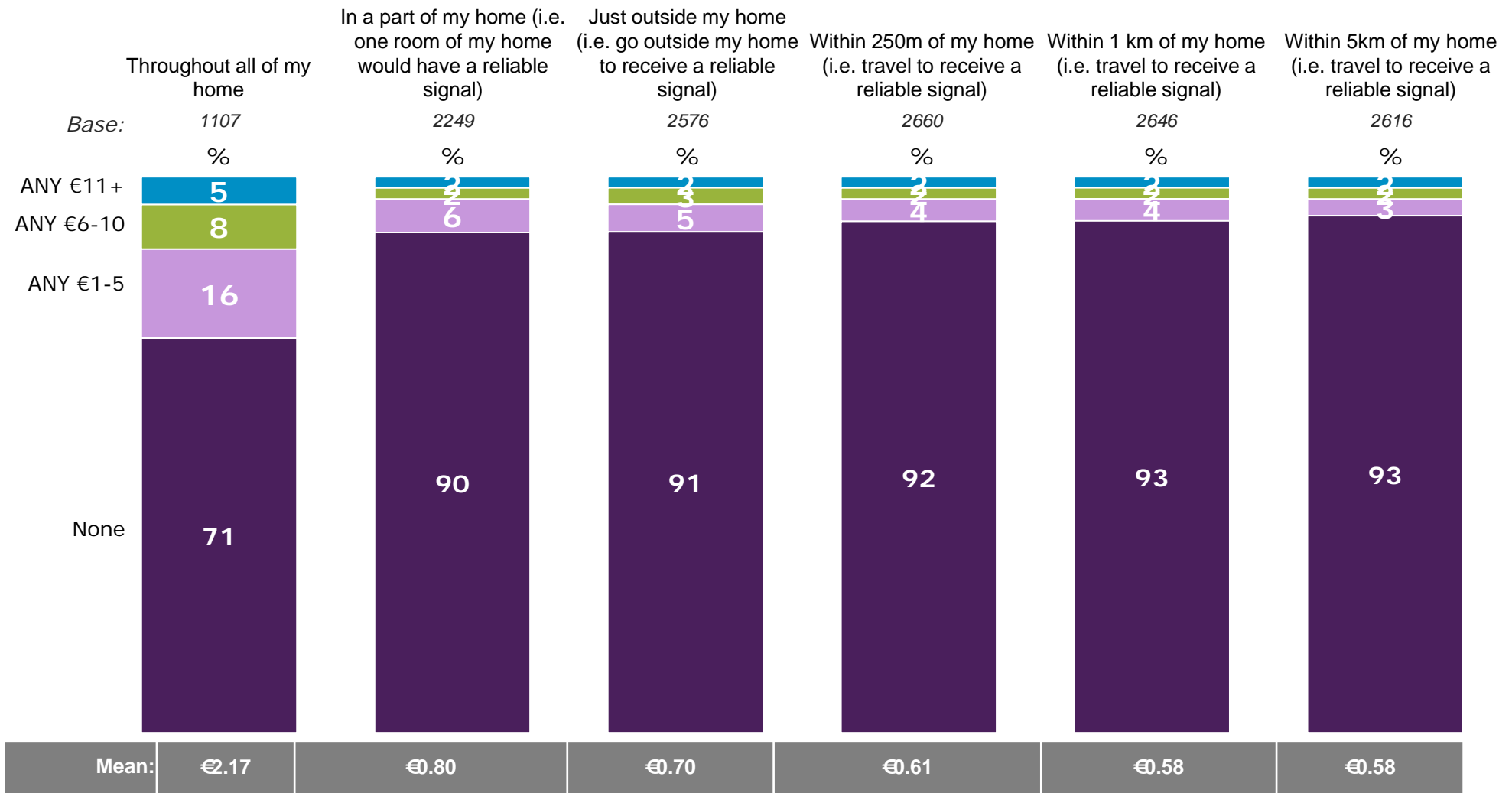
Base: All have mobile n=2724



	Sample				
	Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
	502	491	588	678	465
%	%	%	%	%	%
	70	63	50	59	49
	14	19	18	15	22
	4	6	5	7	6
	3	1	4	2	3
	2	1	6	2	3
	3	3	6	5	4
	4	6	12	9	14

How much extra consumers would be willing to pay for a reliable quality of signal/coverage at various locations

Base: All who do not have reliable quality of signal/coverage at specific location

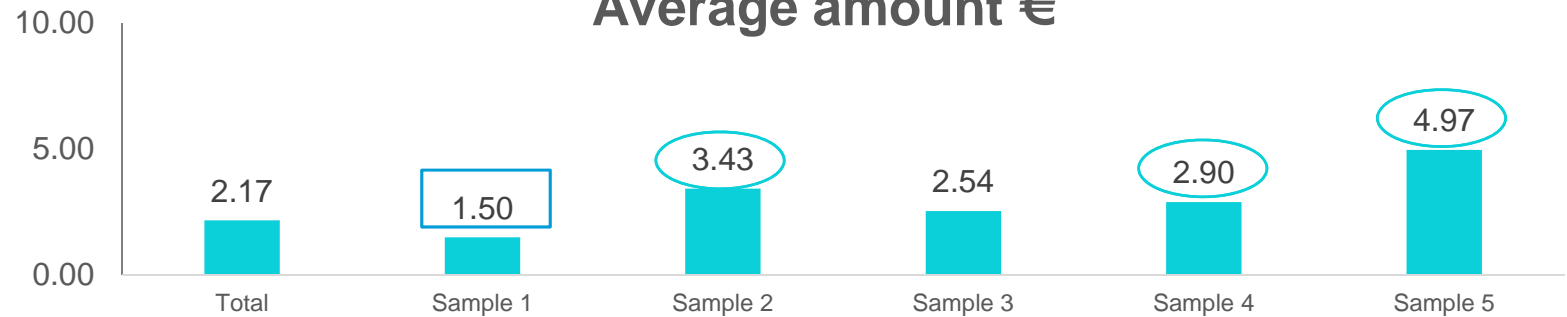


How much extra consumers willing to pay for a reliable quality of signal/coverage at various locations x sample

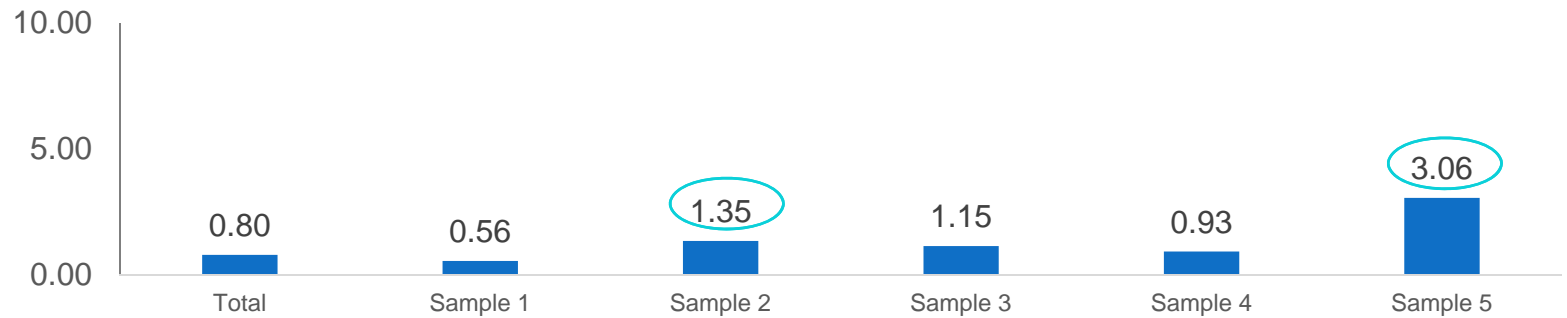
Base: All with mobile

Average amount €

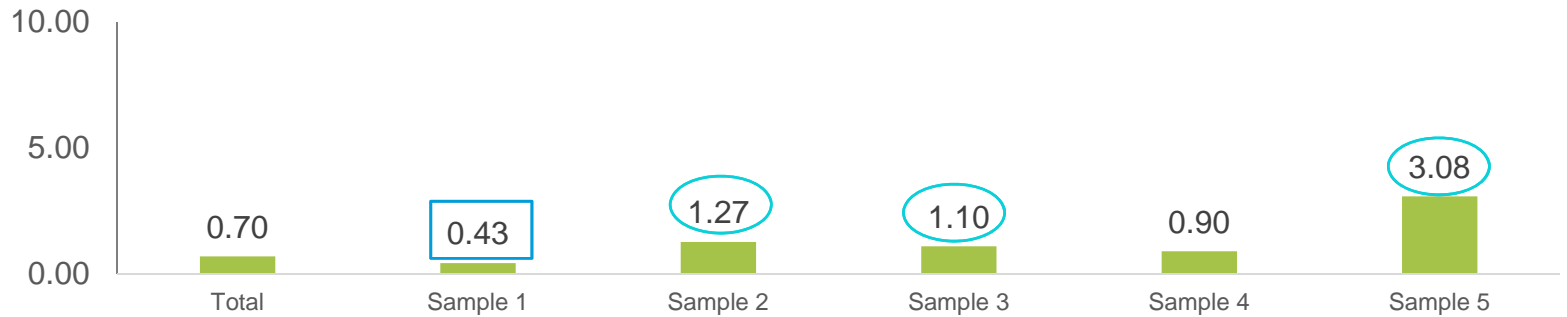
Throughout all of my home



In a part of my home (i.e. one room of my home would have a reliable signal)



Just outside my home (i.e. go outside my home to receive a reliable signal)



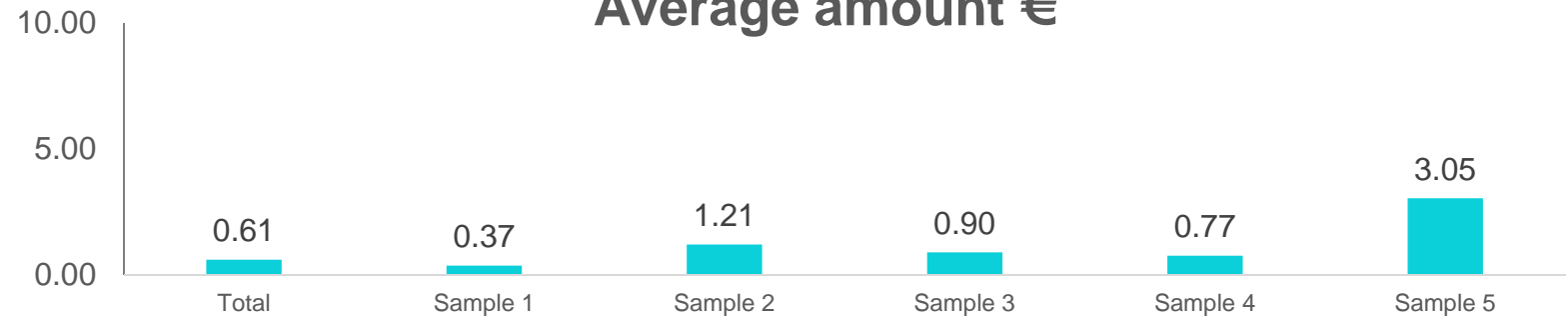
Q.39 How much extra would you be willing to pay overall (per month) for a reliable signal in _____?

How much extra consumers willing to pay for a reliable quality of signal/coverage at various locations x sample

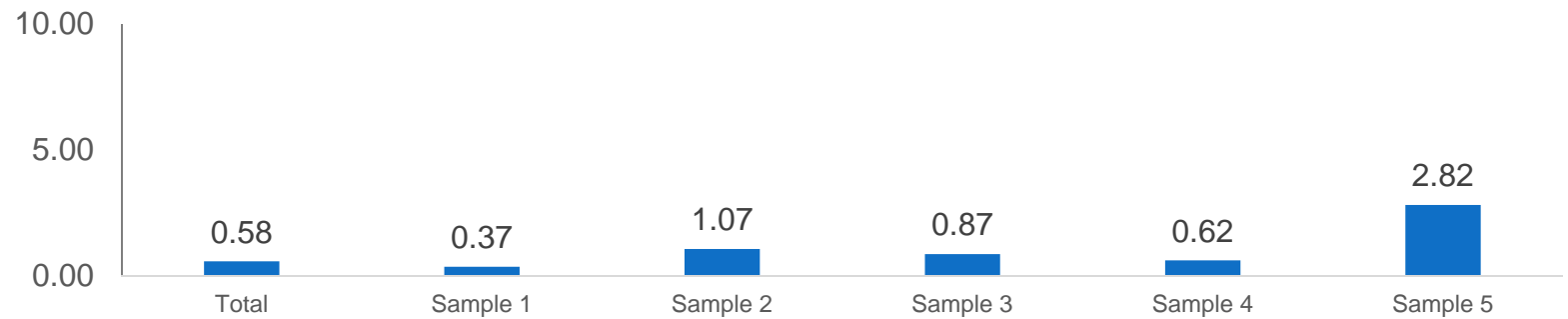
Base: All with mobile

Average amount €

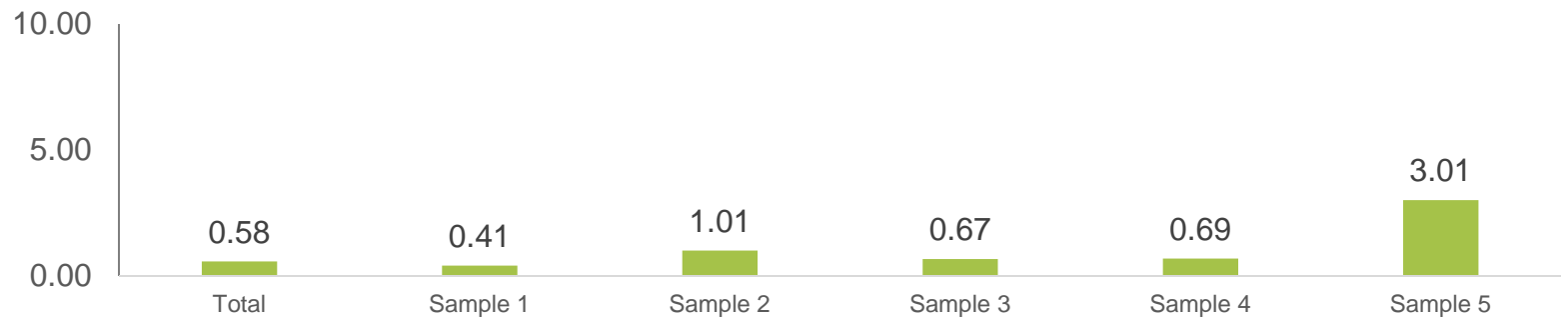
Within 250m of my home
(i.e. travel to receive an
reliable signal)



Within 1km of my home
(i.e. travel to receive an
reliable signal)



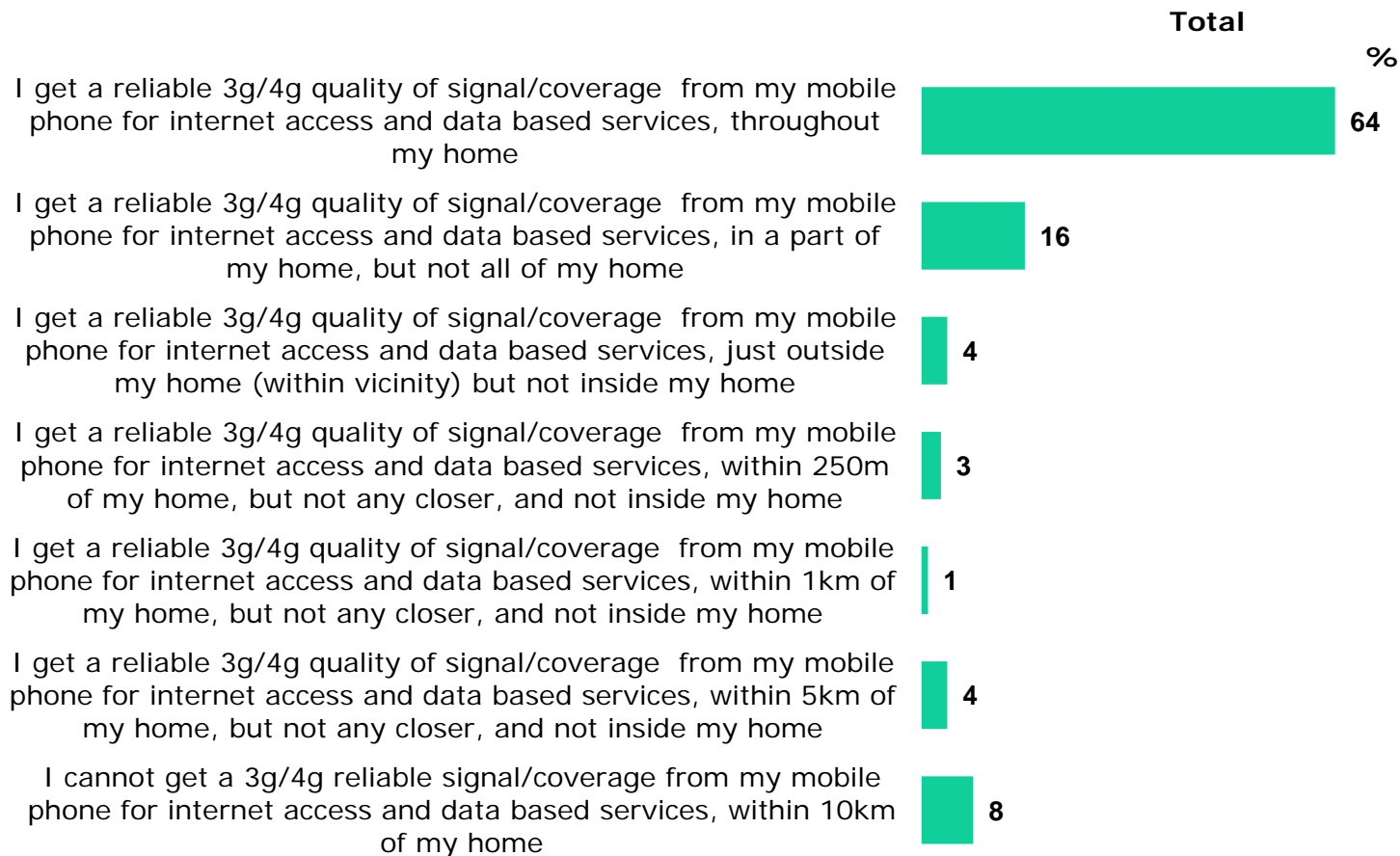
Within 5km of my home
(i.e. travel to receive an
reliable signal)



Q.39 How much extra would you be willing to pay overall (per month) for a reliable signal in _____?

Mobile phone coverage experience for internet and 3G/4G data at home over the last month x samples

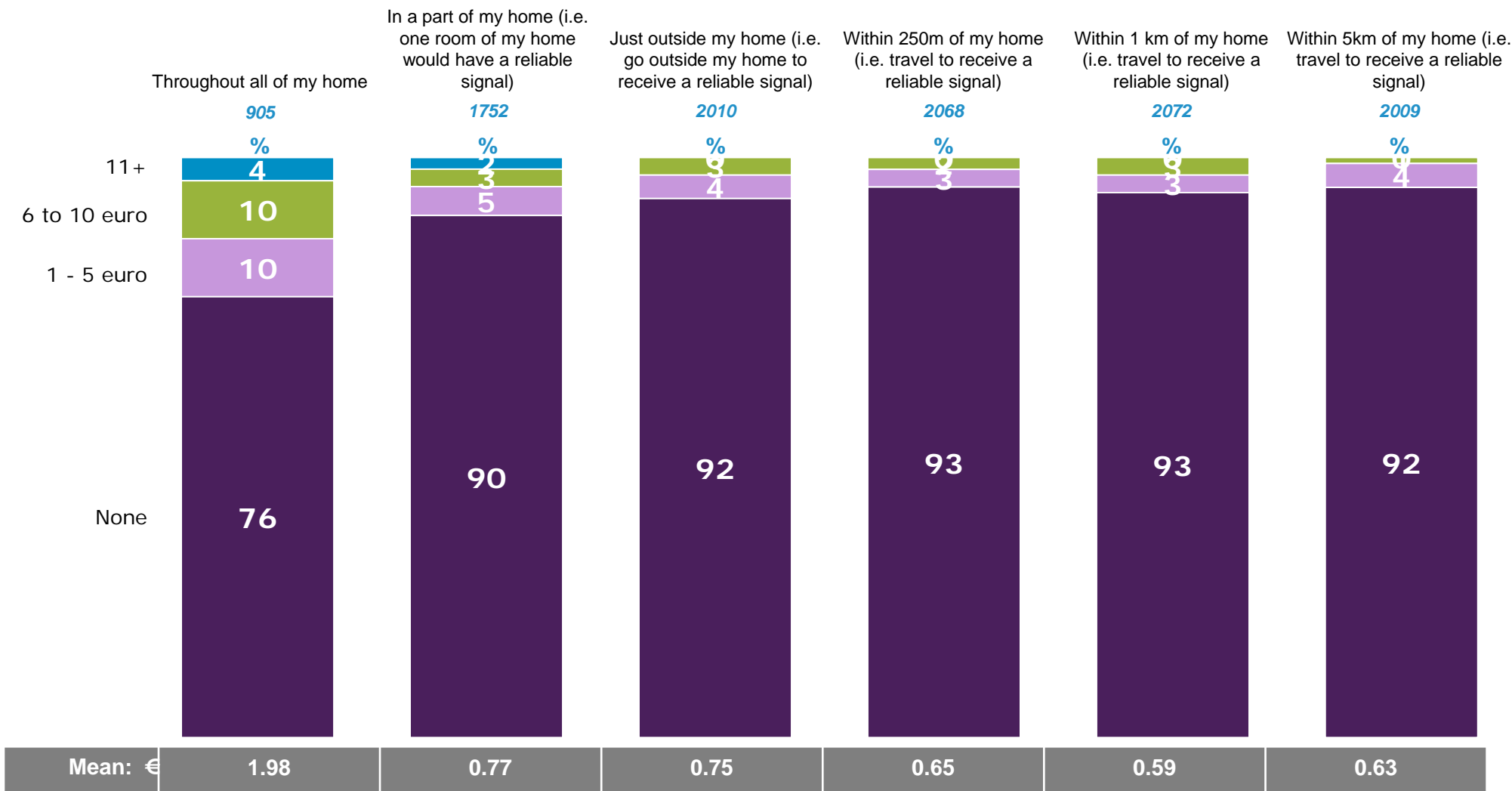
Base: All have smartphone n=2113



	Sample				
	Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
	429	390	449	513	332
%	%	%	%	%	%
	69	63	48	54	47
	15	18	18	16	20
	3	6	7	7	4
	4	1	3	2	1
	1	1	2	2	3
	4	4	8	5	5
	5	7	15	14	19

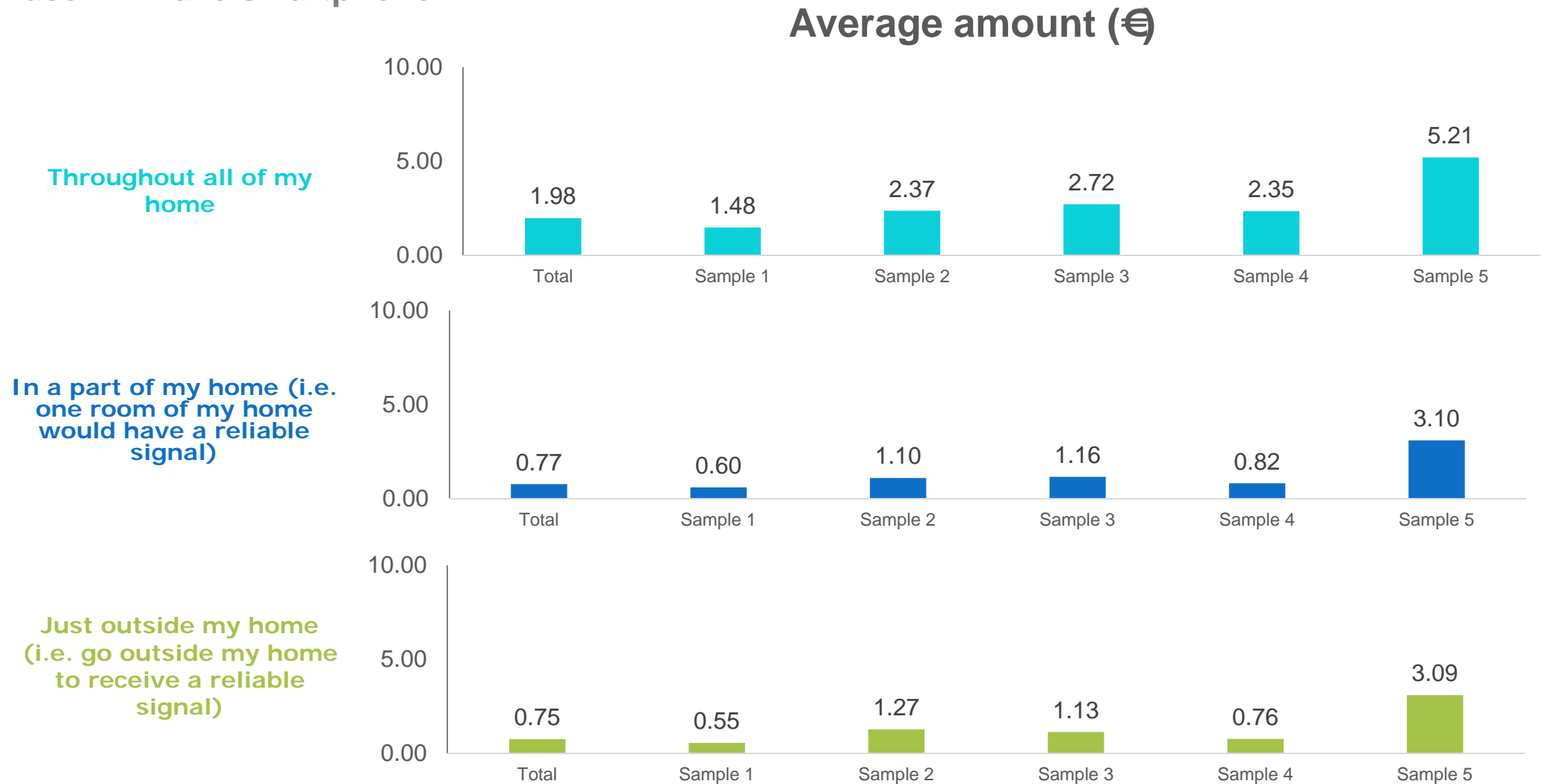
How much extra consumers willing to pay for a reliable quality of signal/coverage (DATA) at various locations

Base: All who do not have reliable quality of signal/coverage at specific location



How much extra consumers willing to pay for a reliable quality of signal/coverage (Data) at various locations x sample

Base: All have smartphone



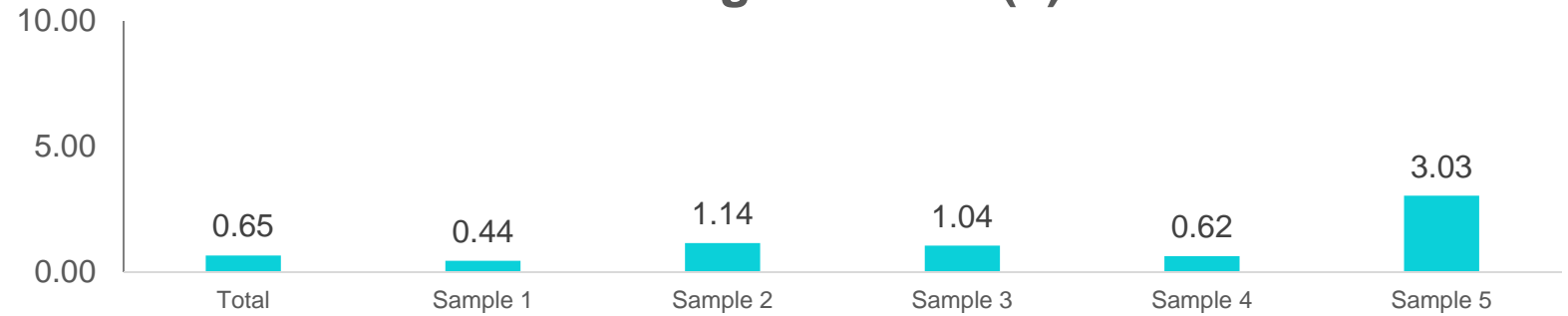
Q.41 how much extra?

How much extra consumers willing to pay for a reliable quality of signal/coverage (Data) at various locations x sample

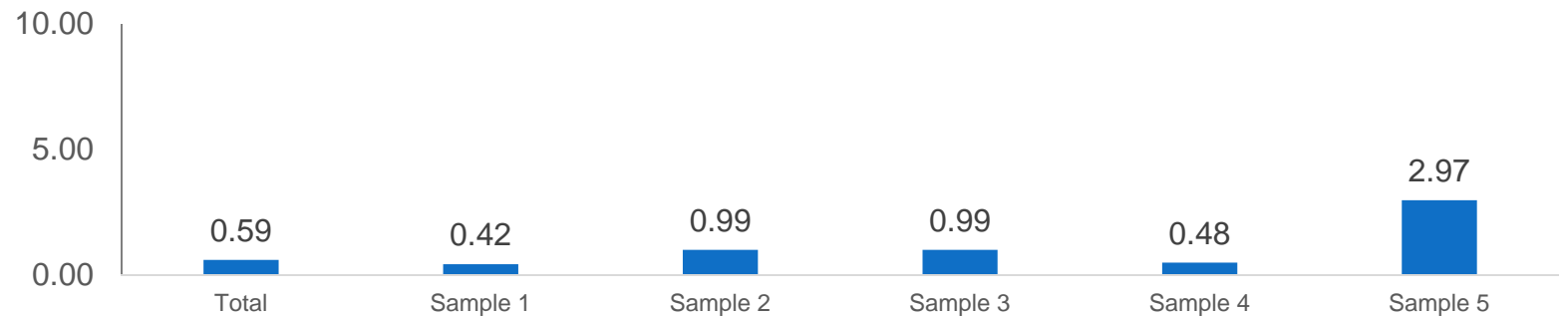
Base: All have smartphone

Average amount (€)

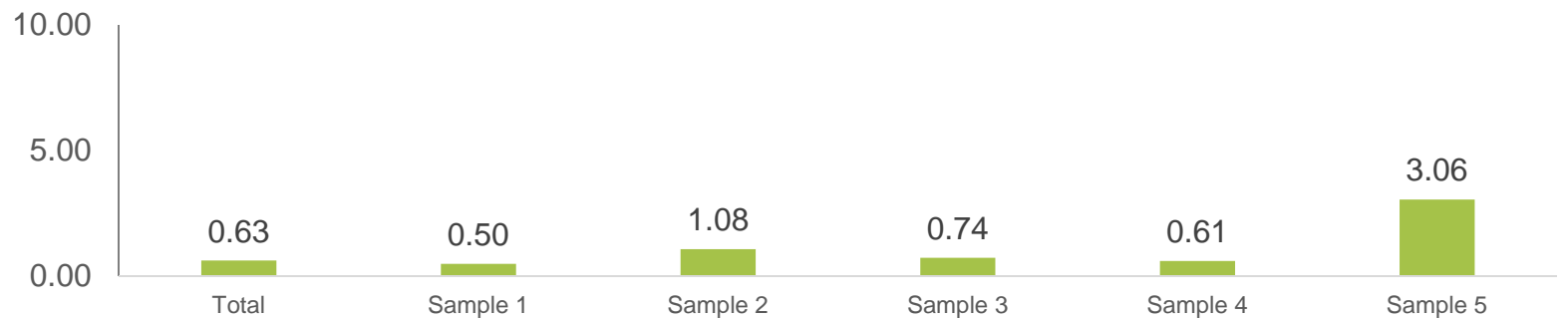
Within 250m of my home
(i.e. travel to receive an
reliable signal)



Within 1km of my home
(i.e. travel to receive an
reliable signal)



Within 5km of my home
(i.e. travel to receive an
reliable signal)



Q.41 how much extra?



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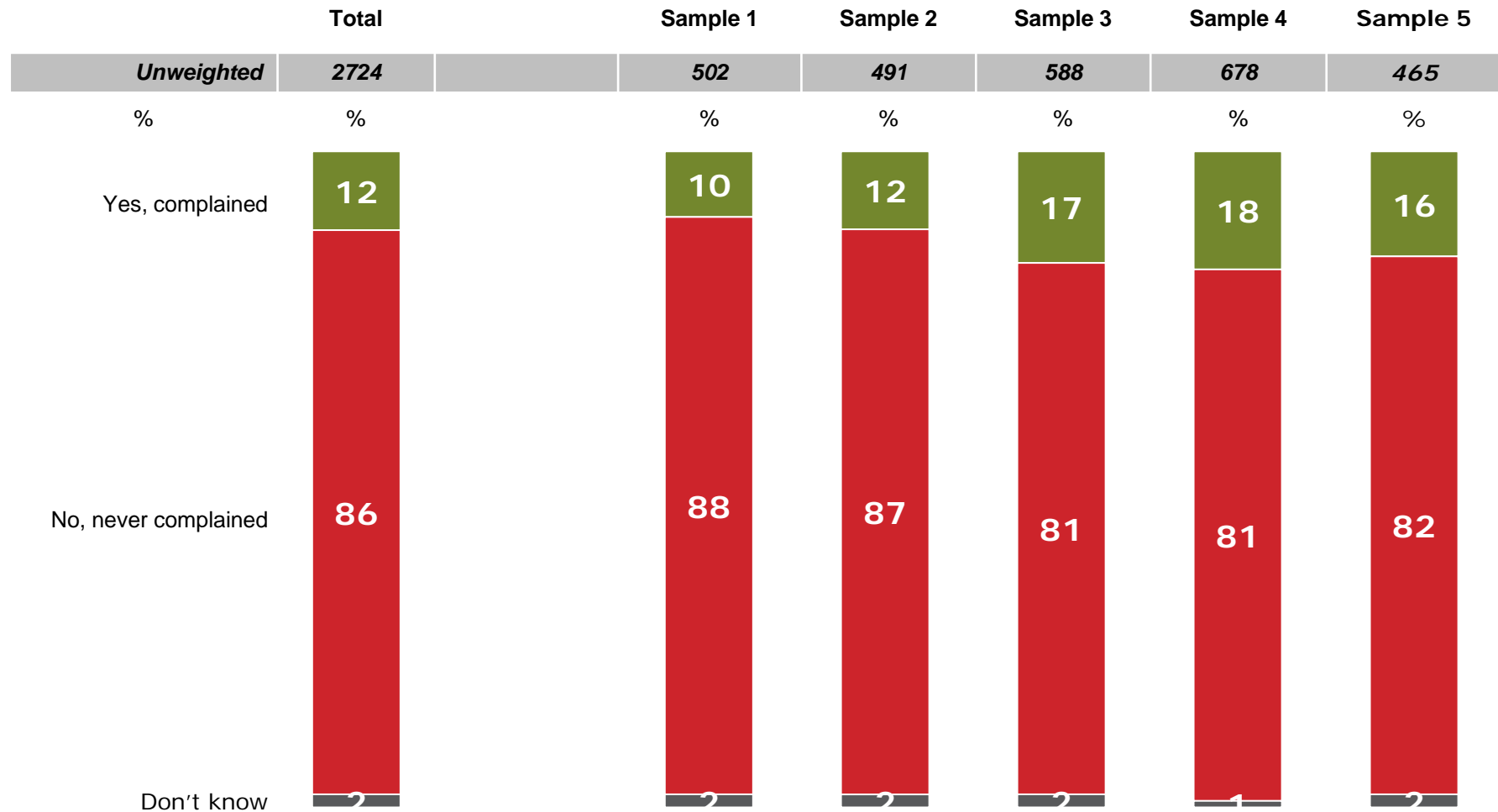
Commission for

Communications Regulation

Complaints and awareness of ComReg

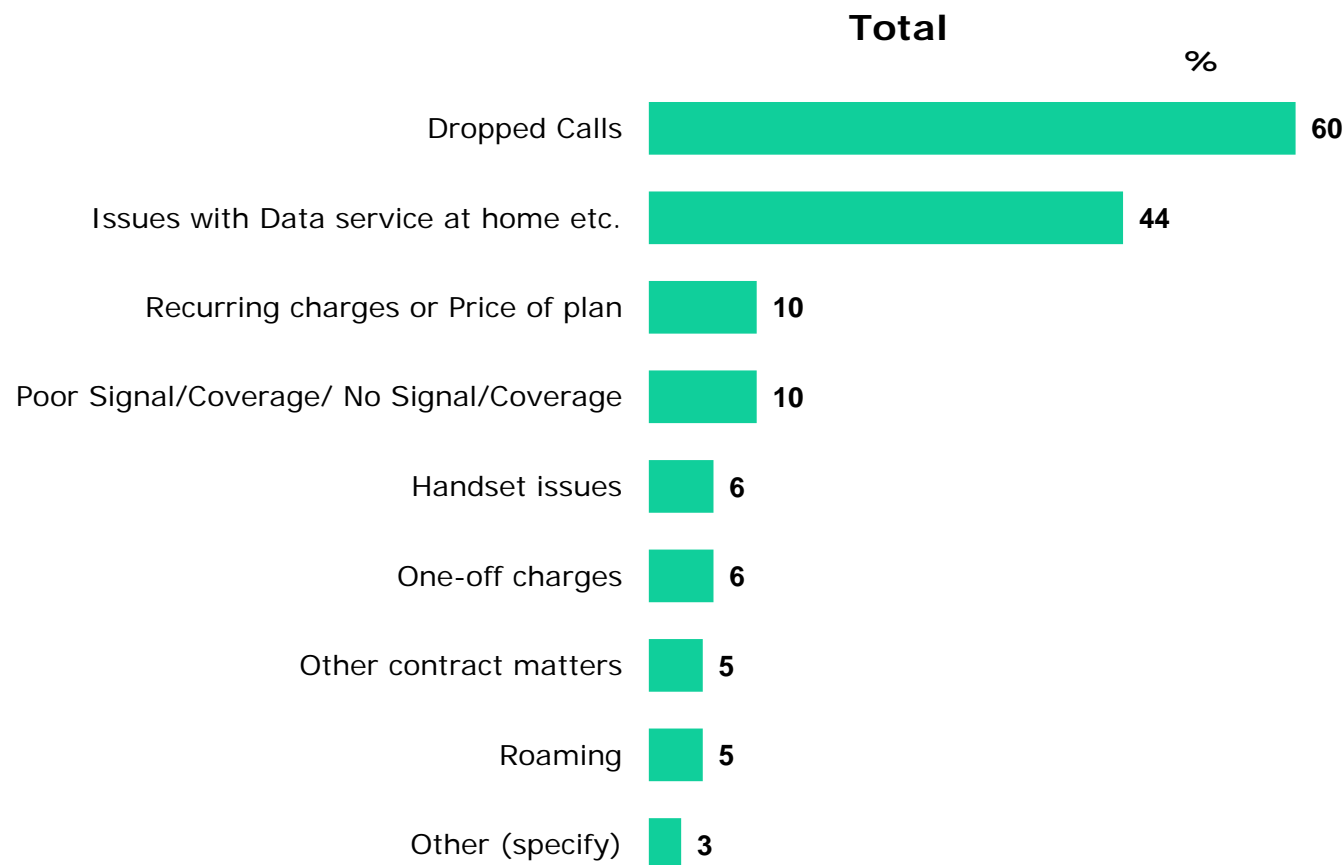
Incidence of having complained to network provider about the quality of mobile phone coverage/signal or quality of service x segments

Base: All have mobile: n=2724



Complaints made to network provider x samples

Base: All who complained to network provider N=397



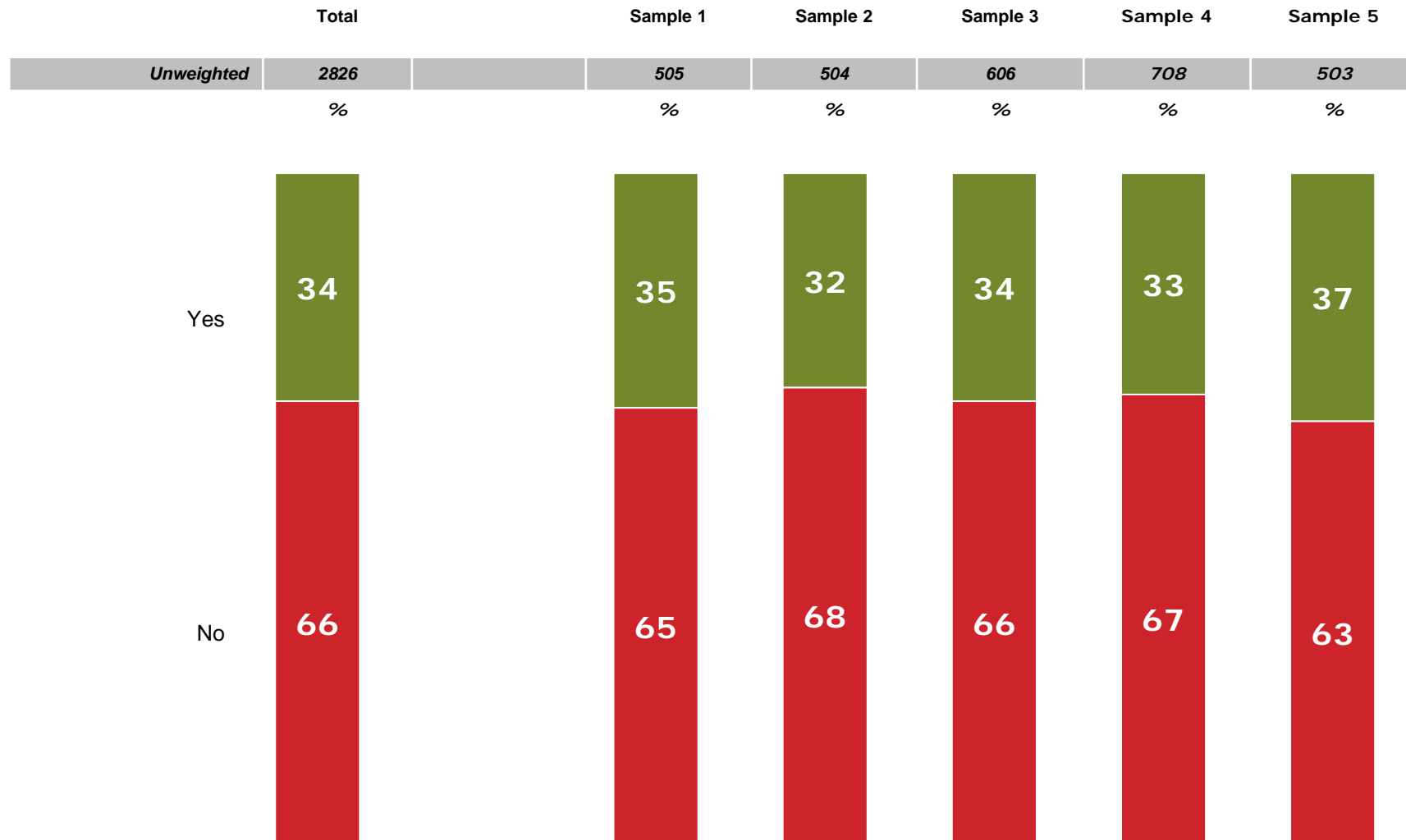
Sample				
Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
52	58	95	123	69
%	%	%	%	%
52	61	85	50	74
42	44	47	51	47
11	7	8	14	5
9	18	11	12	11
7	3	7	6	3
9	-	1	6	-
5	5	5	8	1
6	-	1	8	-
3	3	3	1	-

Base too small to analyse by network provider



Awareness of ComReg

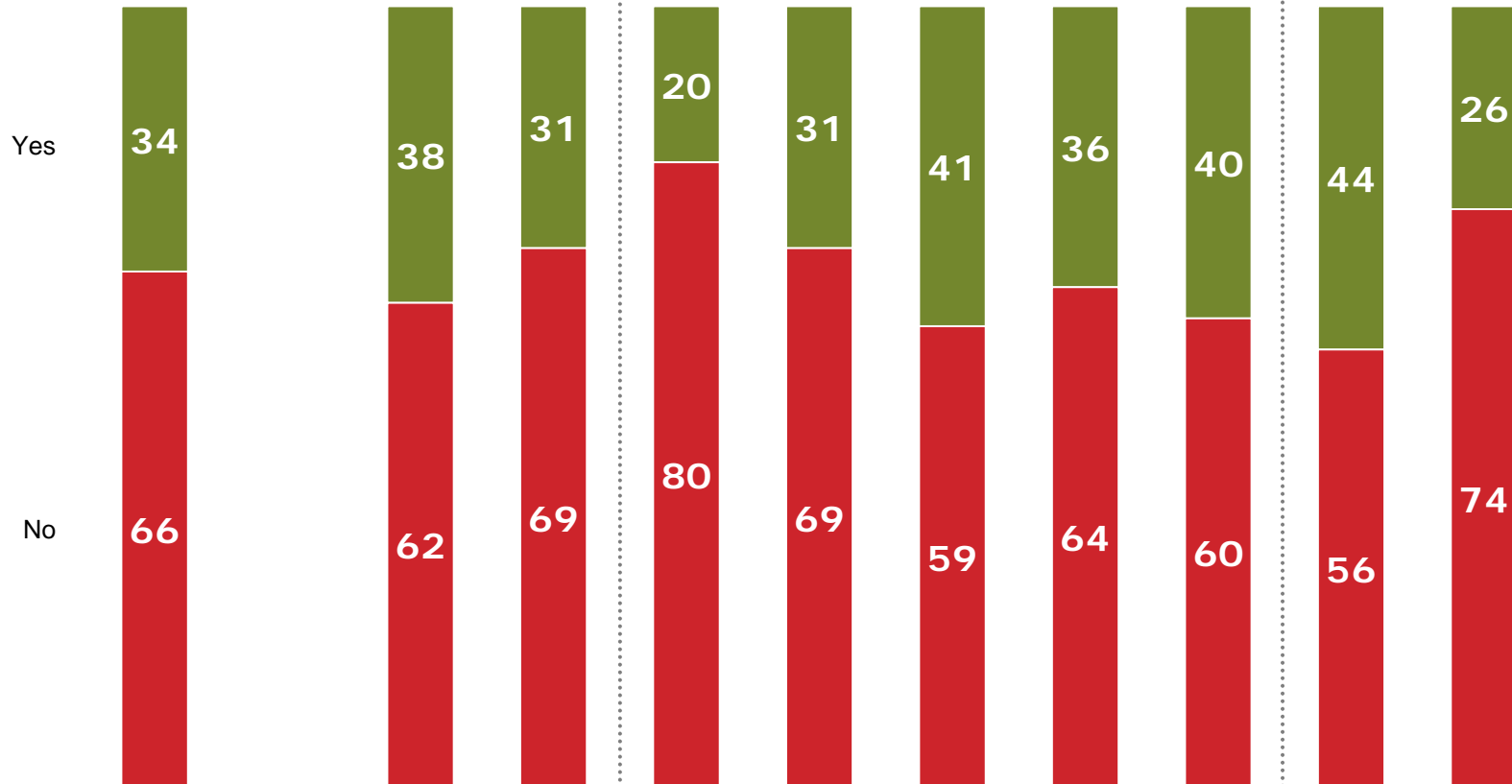
Base: All adults 15+: N=2826



Awareness of ComReg x demographics

Base: All adults 15+: N=2826

	Total	Gender		Age					Social Class	
		Male	Female	16-24	25-34	35-49	50-64	65+	ABC1 F50+	C2DE F50-
Unweighted	2826	1382	1444	341	441	833	651	560	1331	1495
	%	%	%	%	%	%	%	%	%	%



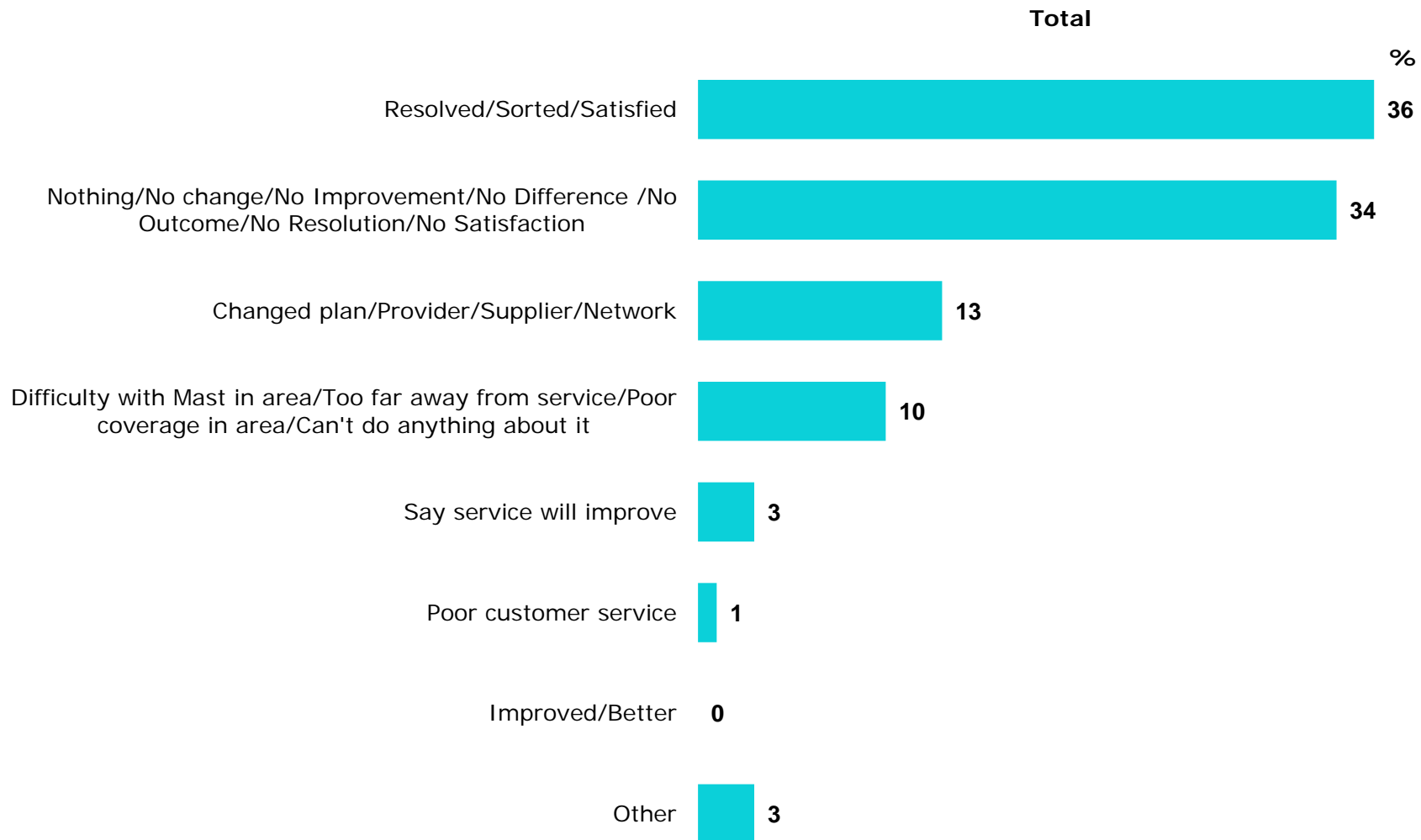
Incidence of making complaint to ComReg regarding issues in relation to coverage or quality of service

Base: All aware of ComReg N=973



Outcome of complaint made to ComReg regarding issues in relation to coverage or quality of service

Base: All respondents who complained to ComReg n=40



Notes:

This is a survey commissioned by the Commission for Communications Regulation in the summer of 2017 to examine consumer perceptions and experiences of mobile coverage and signal.

This information contained in this presentation is part of ongoing work currently being carried out by ComReg.



PREPARED BY:

Behaviour & Attitudes and The Research
Perspective on behalf of ComReg



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Commission for
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