



Commission for  
**Communications Regulation**

# OTA & eSIM Consumer Survey

Q1 2022

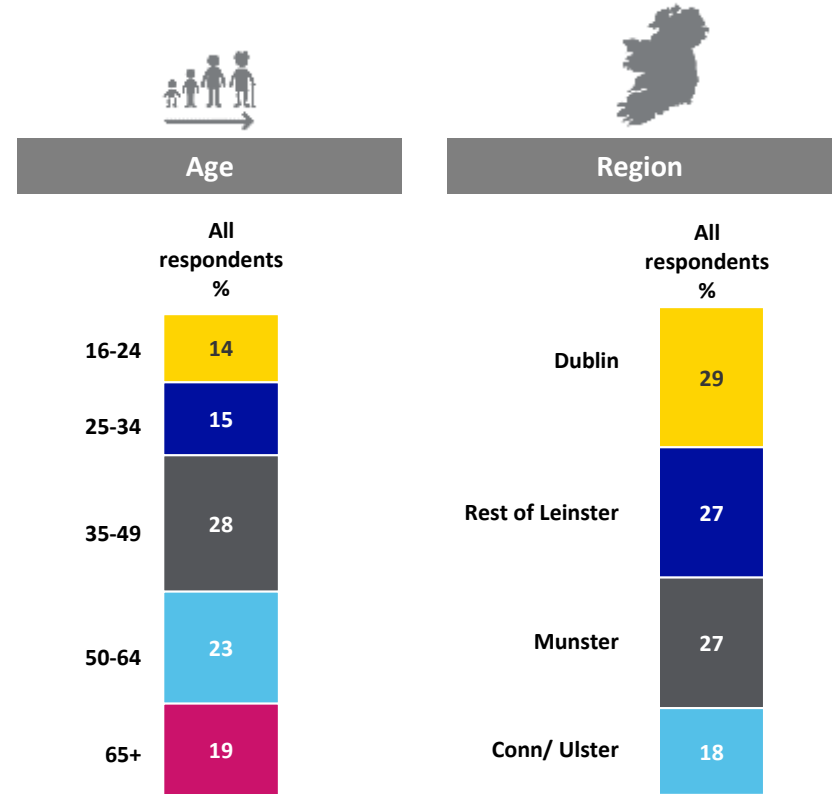


RESEARCH  
& INSIGHT

# Methodology and sample profile

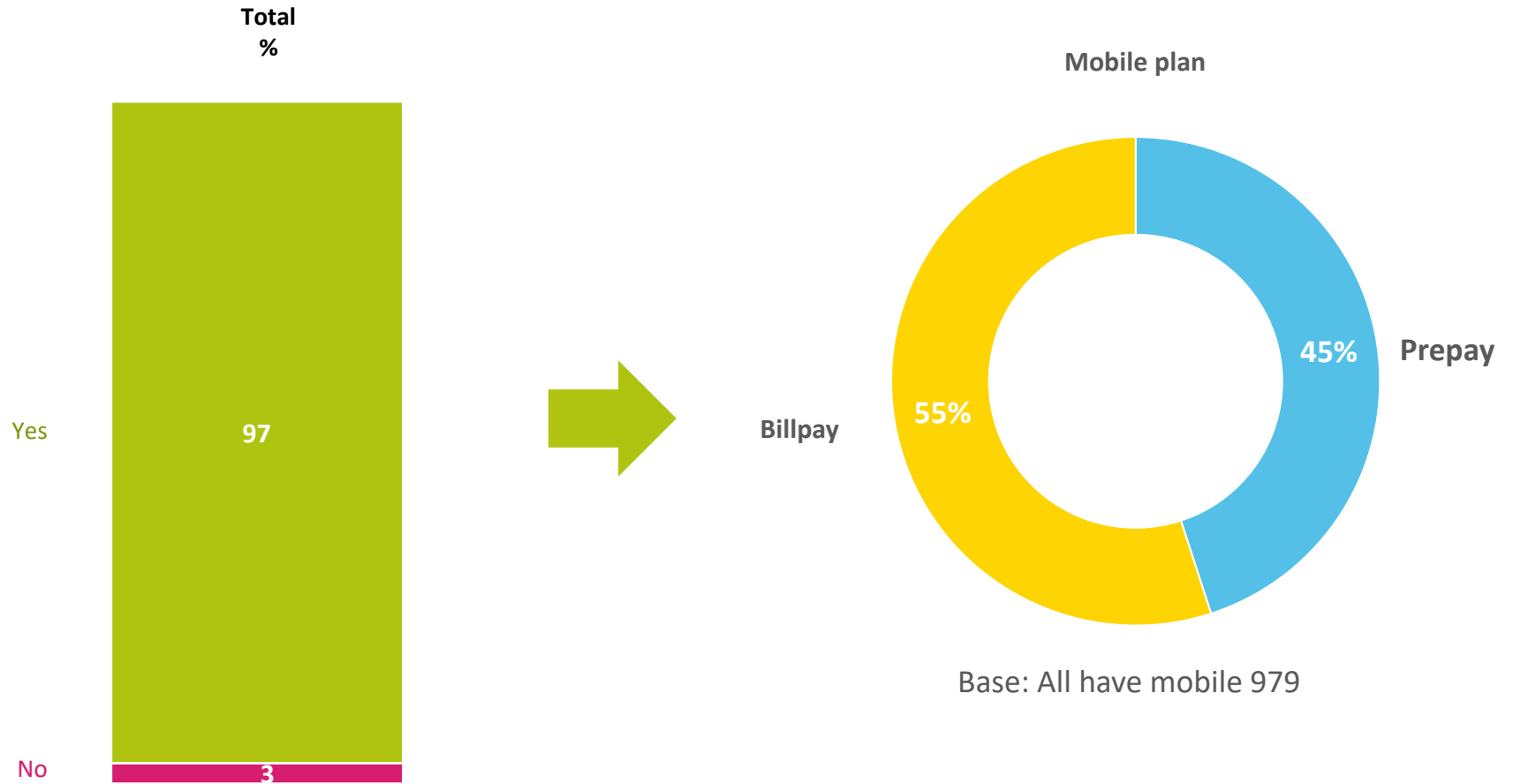
Base: All respondents aged 16+ - 1,010

- The agreed questionnaire was included on one wave of the Behaviour & Attitudes face-to-face omnibus. This survey is administered to a sample of 1,010 adults aged 16+.
- The sample is quota controlled to match the known demographics of the population (CSO estimates).
- Face-to-face fieldwork on the project was undertaken between 24<sup>th</sup> February to 8<sup>th</sup> March 2022.



# Almost all (97%) use a mobile phone

Base: All adults 16+ 1,010

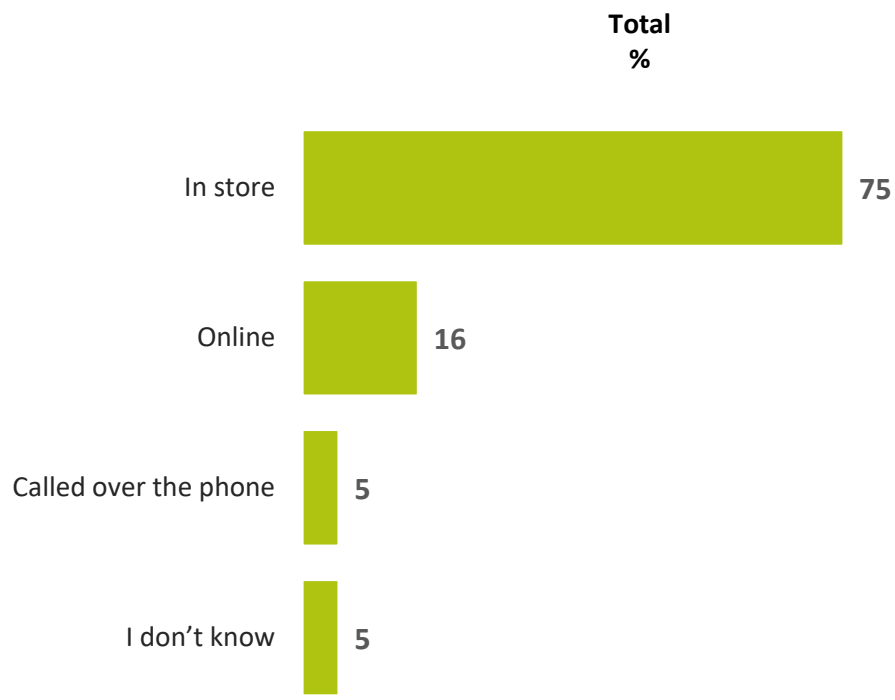


Q.1 Do you have a mobile phone that you yourself use?

Q.3 Is your mobile plan 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)?

# Method of signing up to your current provider

Base: All have mobile 979



# Method of signing up to your current provider



Base: All have mobile 979

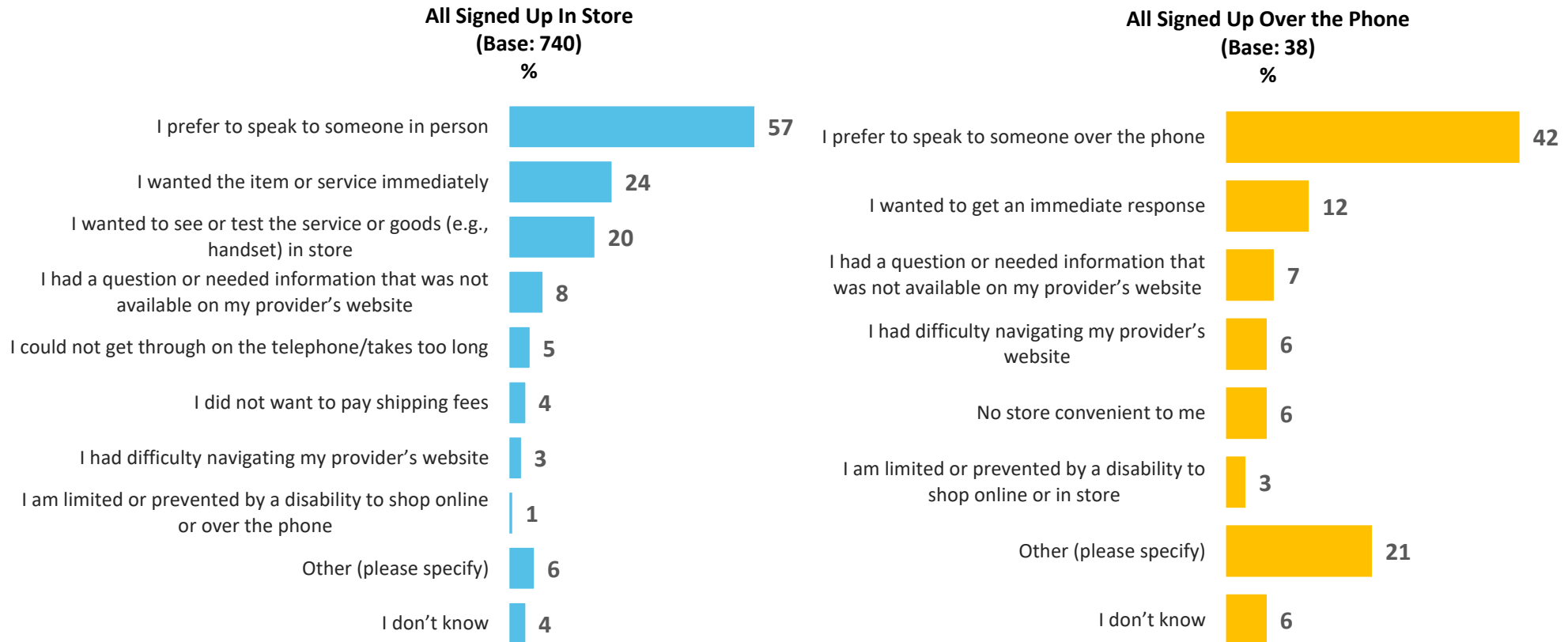
	Total	Age					Region					Area		Pay For Mobile	
		16-24	25-34	35-49	50-64	65+	Dublin	Outside Dublin	Lein-ster	Mun-ster	Conn/UI-ster	Urban	Rural	Prepay	Billpay
<b>UNWTD</b>	<b>979</b>	<b>115</b>	<b>148</b>	<b>298</b>	<b>244</b>	<b>174</b>	<b>279</b>	<b>700</b>	<b>271</b>	<b>258</b>	<b>171</b>	<b>661</b>	<b>318</b>	<b>467</b>	<b>510</b>
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
In store	75	71	73	72	77	82	67	78	84	71	80	73	79	84	67
Online	16	23	23	18	10	7	22	13	12	16	12	17	13	10	20
Called over the phone	5	2	1	6	8	3	6	4	2	6	3	4	5	2	7
I don't know	5	5	3	5	4	8	5	5	2	7	5	6	3	4	5

# Reasons for signing up in store/over the phone methods



Base: All have mobile 979

March 2022



Q.5a You have indicated that you signed-up to your current provider in store. Which of the following reasons best describes why you chose to sign up in store, rather than online or over the phone?

Q.5b You have indicated that you signed-up to your current provider over the phone. Which of the following reasons best describes why you chose to sign up over the phone, rather than online or in store?

# Reasons for signing up in store

Base: All signed up in store 740

	Total	Age					Region					Area		Pay For Mobile	
		16-24	25-34	35-49	50-64	65+	Dublin	Outside Dublin	Leinster	Munster	Conn/Ulster	Urban	Rural	Prepay	Billpay
UNWTD	740	84	105	216	192	143	186	554	232	183	139	484	256	387	352
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
I prefer to speak to someone in person	57	40	53	59	64	62	51	60	59	60	60	55	61	57	58
I wanted the item or service immediately	24	28	28	27	20	17	25	23	16	25	31	24	23	23	25
I wanted to see or test the service or goods (e.g., handset) in store	20	30	31	15	17	15	11	24	25	23	23	16	28	17	23
I had a question or needed information that was not available on my provider's website	8	7	11	7	9	8	6	9	9	13	4	8	9	7	9
I could not get through on the telephone/takes too long	5	3	4	4	5	7	4	5	7	5	2	4	5	3	7
I did not want to pay shipping fees	4	4	2	5	4	4	8	3	4	3	-	5	2	4	5
I had difficulty navigating my provider's website	3	2	2	2	5	4	1	3	3	4	3	3	2	3	2
I am limited or prevented by a disability to shop online or over the phone	1	2	-	1	-	5	1	1	0	4	-	1	1	1	2
Other (please specify)	6	6	11	5	5	6	6	6	9	3	8	6	7	8	5
I don't know	4	6	-	3	4	4	7	2	1	3	3	5	2	3	4

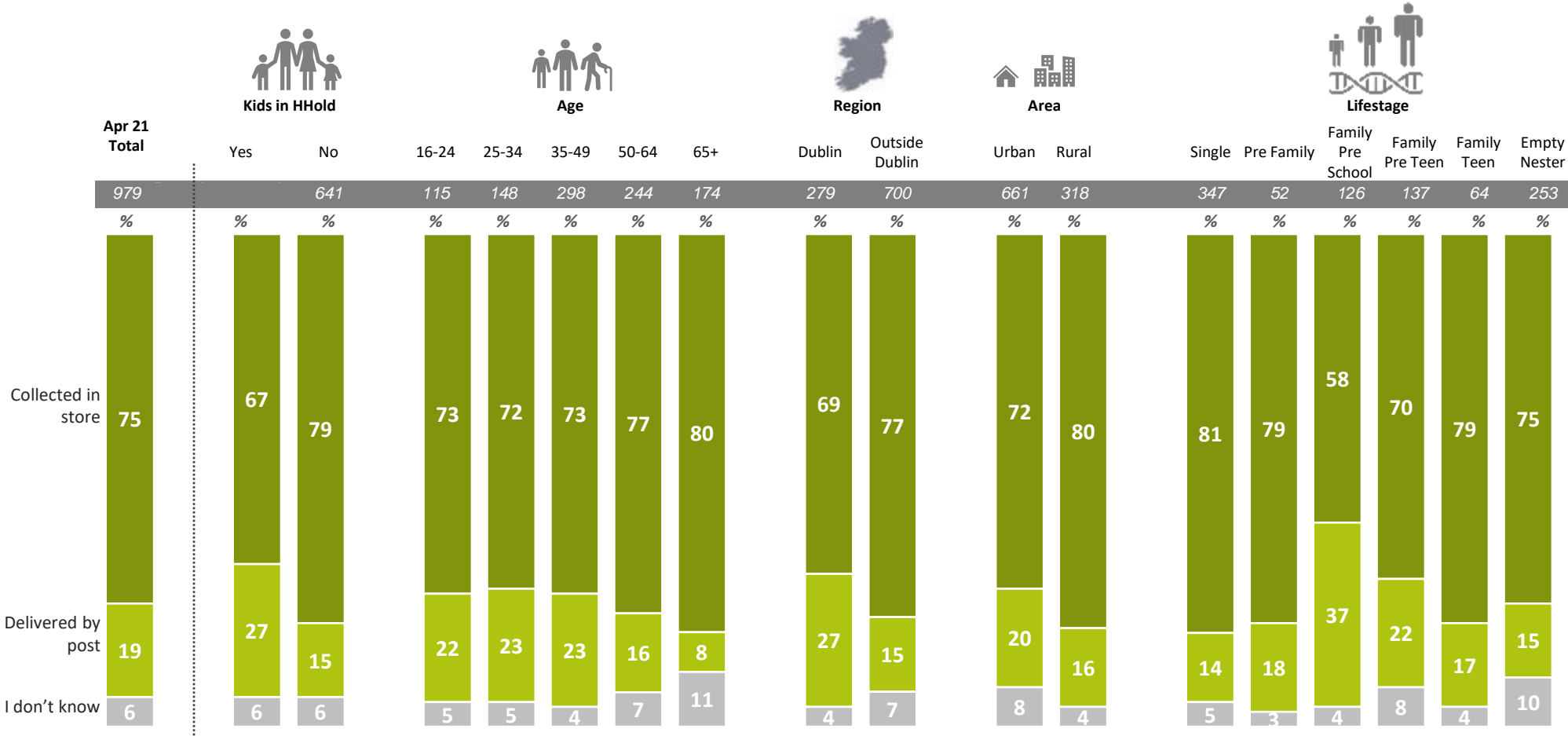


# Method of receiving your SIM Card



Base: All have mobile 979

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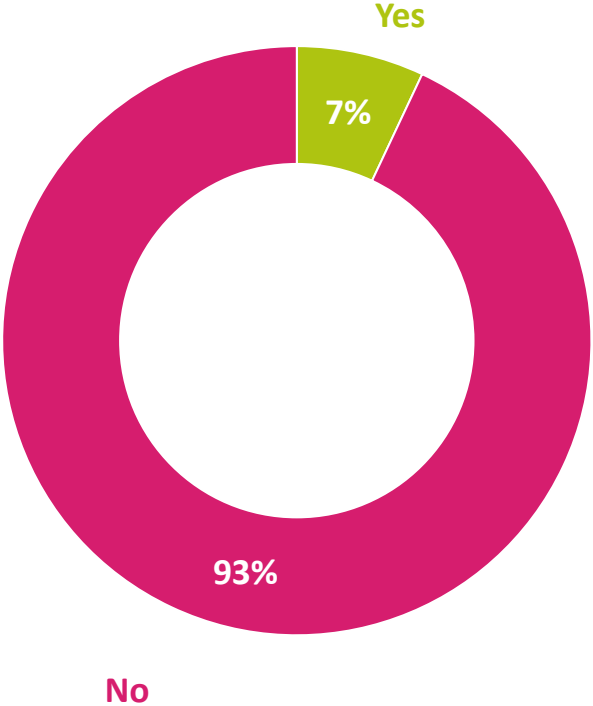




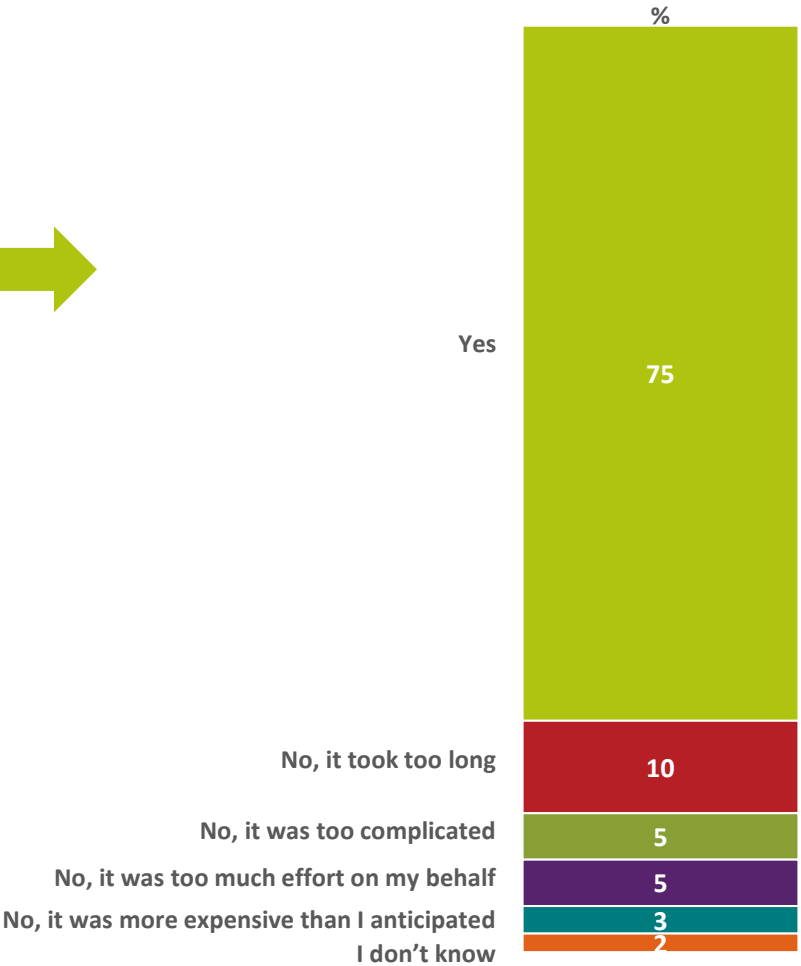
# Switching mobile service provider or subscription in the past 12 months

Base: Have Mobile

Have you switched mobile provider in past 12 months  
%



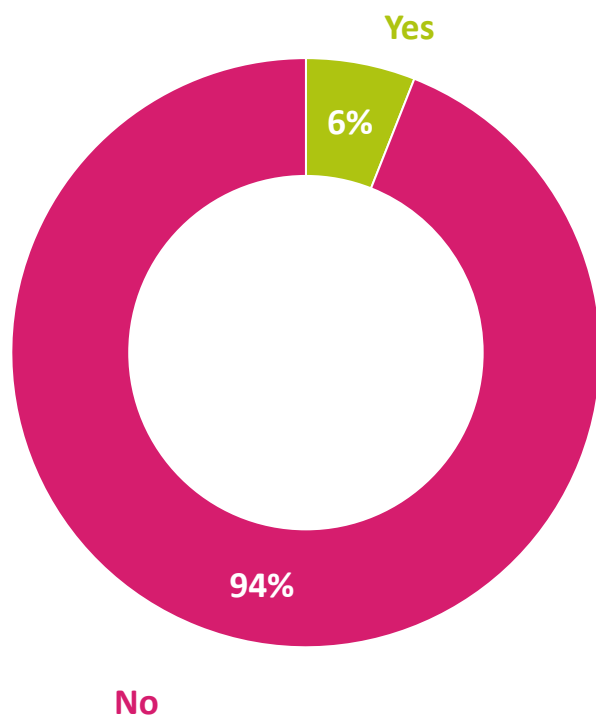
Level of satisfaction with switching  
(Base – those who switched n = 72)



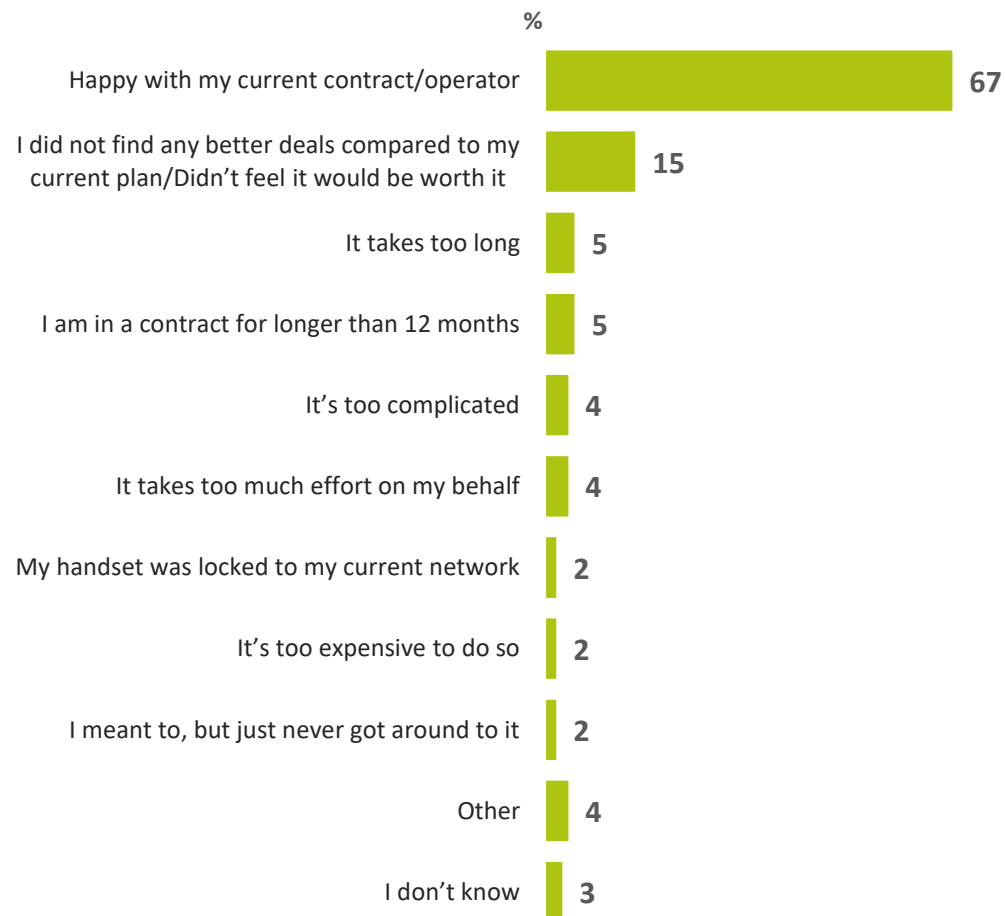
# Consideration of switching mobile service provider or subscription in past 12 months

Base: those who have not switched n - 907

Considered switching mobile provider in past 12 months  
%



Reasons for not switching mobile provider in past 12 months  
%

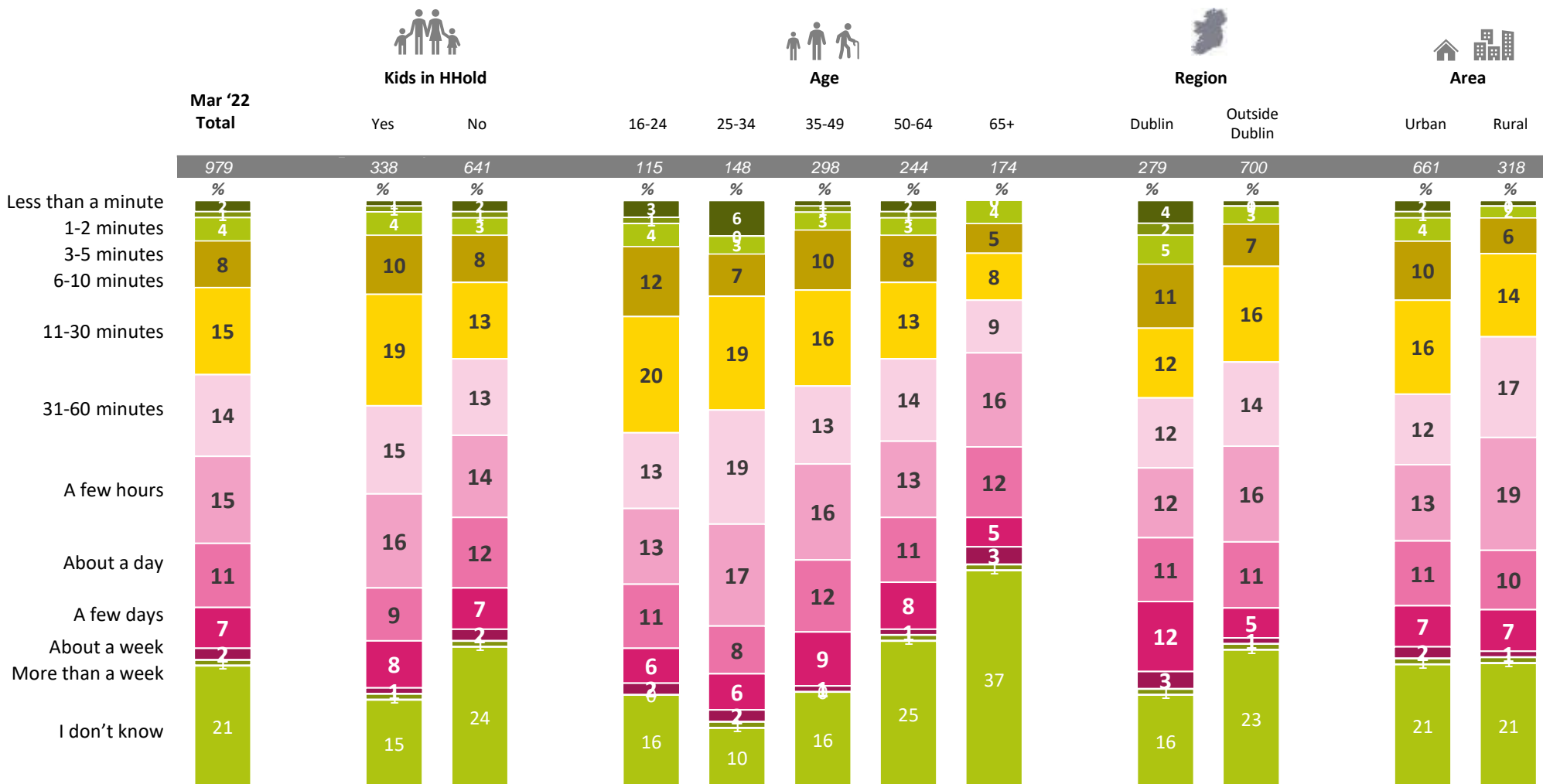


# Expected duration of switching process



Base: All adults 16+ n 1001

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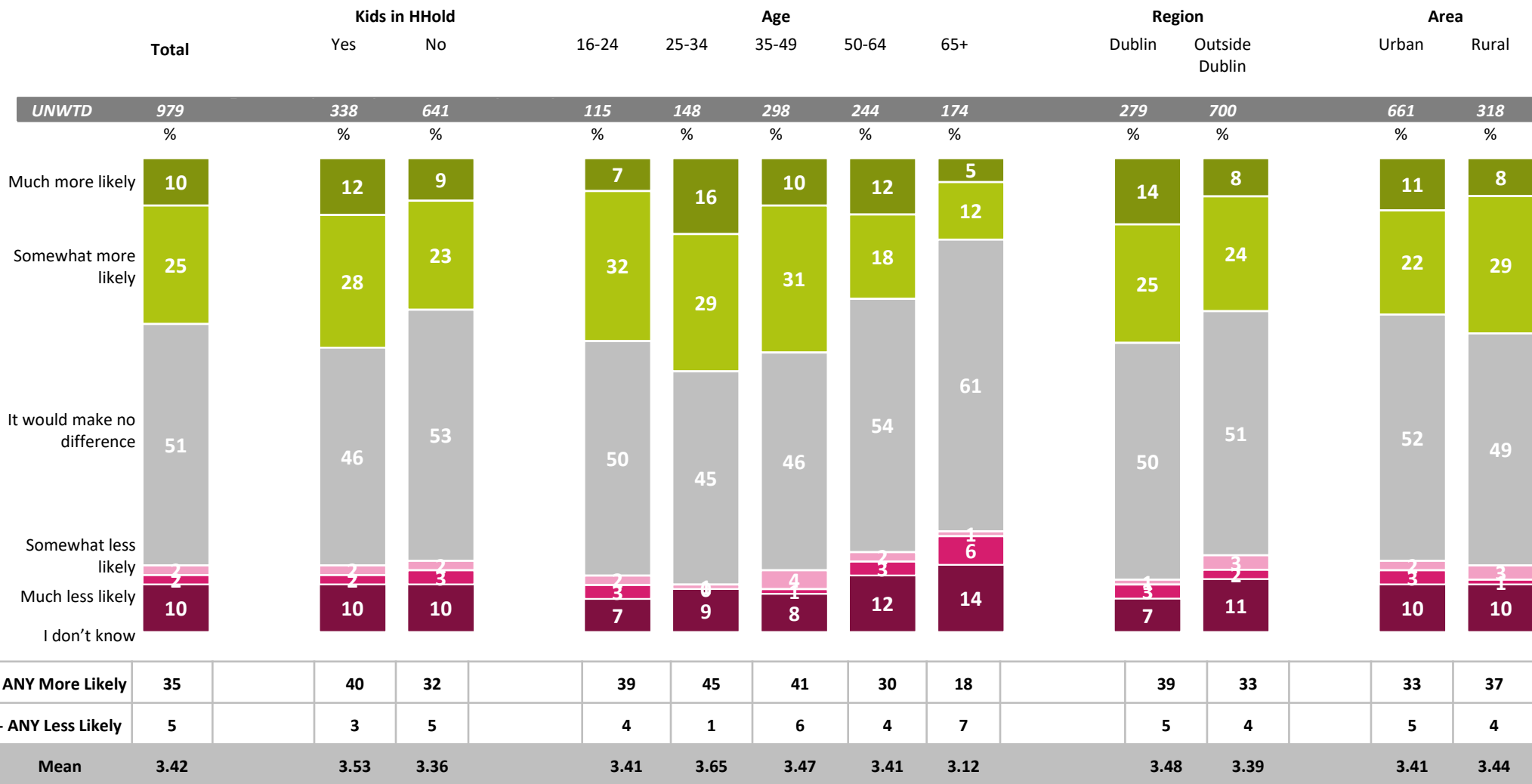


# Likelihood of switching if the process took 5 minutes or less



Base: All adults 16+ n 979

March 2022



# Key technical descriptions

## eSim

*An eSIM is embedded in a mobile device and allows you to digitally sign up to or switch mobile subscriptions without the need for any physical steps (for example, so no need to visit a store, or waiting for postal delivery of a SIM card, or physically removing the old SIM card). Recent research by ComReg found that eSIM could reduce the time it typically takes to complete a switch from a few days to a few minutes.*

## eSim Sign up or Switching

*eSIM sign-up or switching to another operator can be activated by either downloading a mobile application or scanning a QR code. So for example you can sign-up or switch by creating a profile on an operator's mobile application (e.g. downloading Vodafone app and creating a profile) and then purchasing a cellular plan on the application or by requesting a QR code which can then be scanned by your device's camera (requiring a second device to display the QR code) and will install/activate your cellular plan within your device's settings.*

## QR Code

*A QR code is a type of barcode that stores information and can be easily read by a digital device, such as a smartphone. For example, the EU Digital Covid Certificate contains a QR code.*

## Mobile Apps

*Some people buy goods and services directly on their mobile phone using mobile applications (sometimes referred to as 'apps') (for example, using Revolut, Deliveroo, JustEat, Spotify, or the Amazon App).*

Base: All adults 16+ n 979

March 2022



Kids in HHold



Age

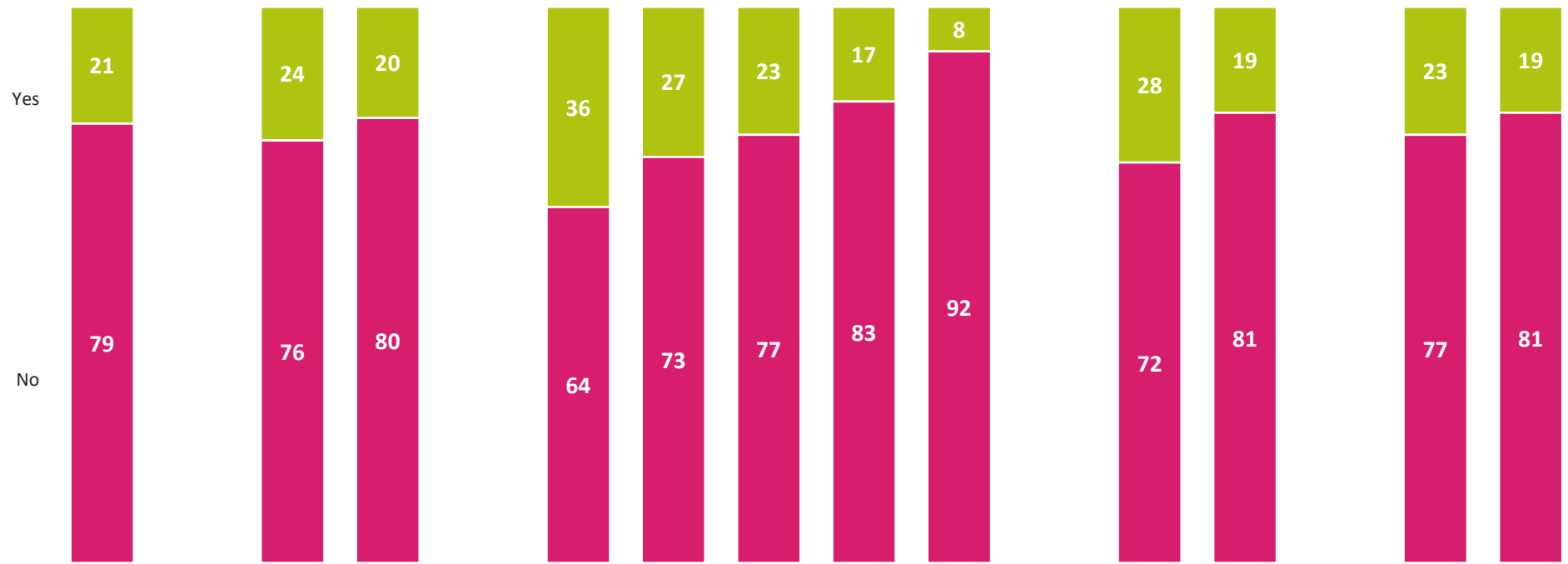


Region



Area

Mar '22	Kids in HHold		Age					Region		Area	
Total	Yes	No	16-24	25-34	35-49	50-64	65+	Dublin	Outside Dublin	Urban	Rural
979	338	641	115	148	298	244	174	279	700	661	318
%	%	%	%	%	%	%	%	%	%	%	%

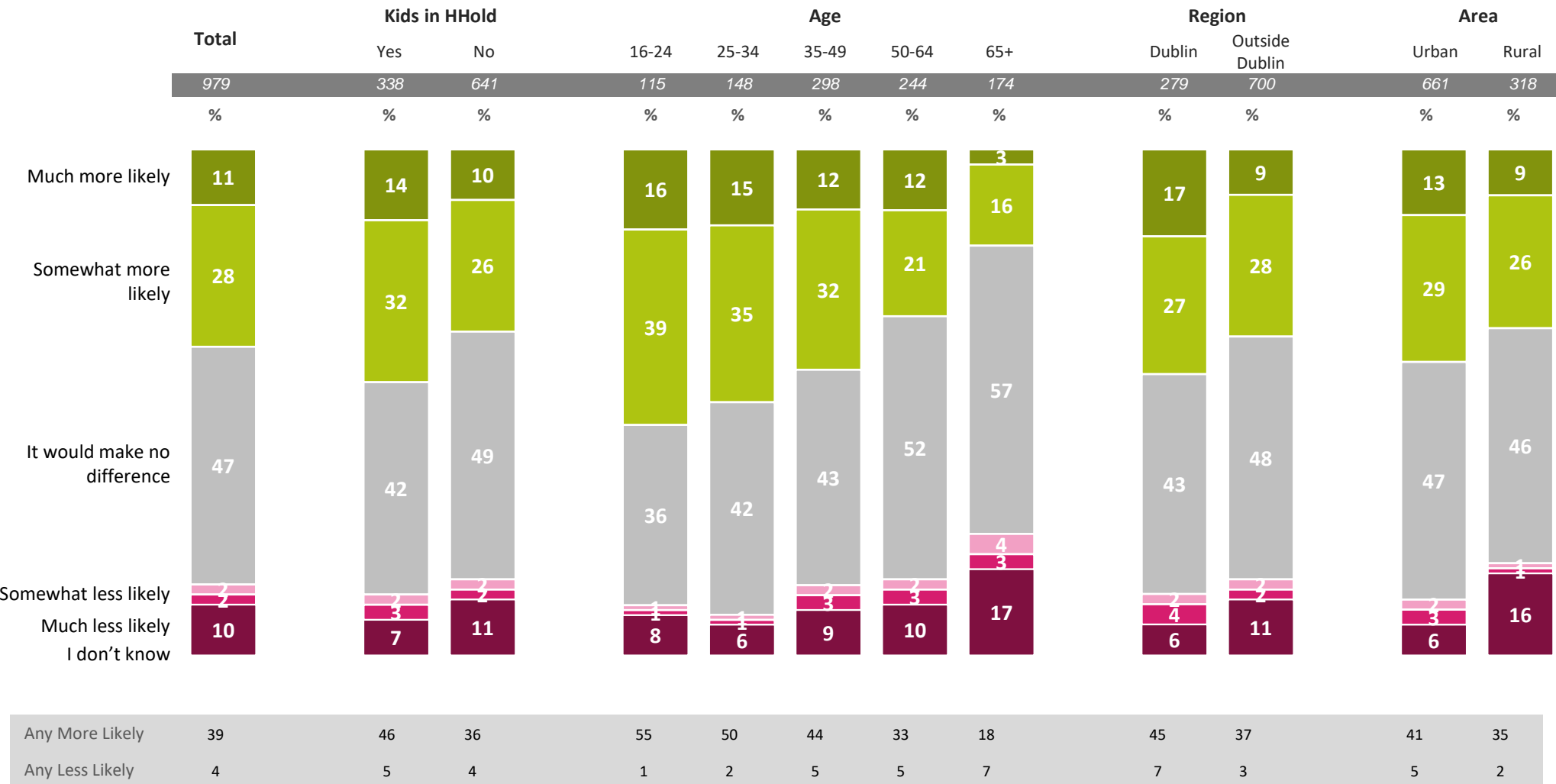


# Likelihood of switching provider if you could switch using eSIM



Base: All have mobile 979

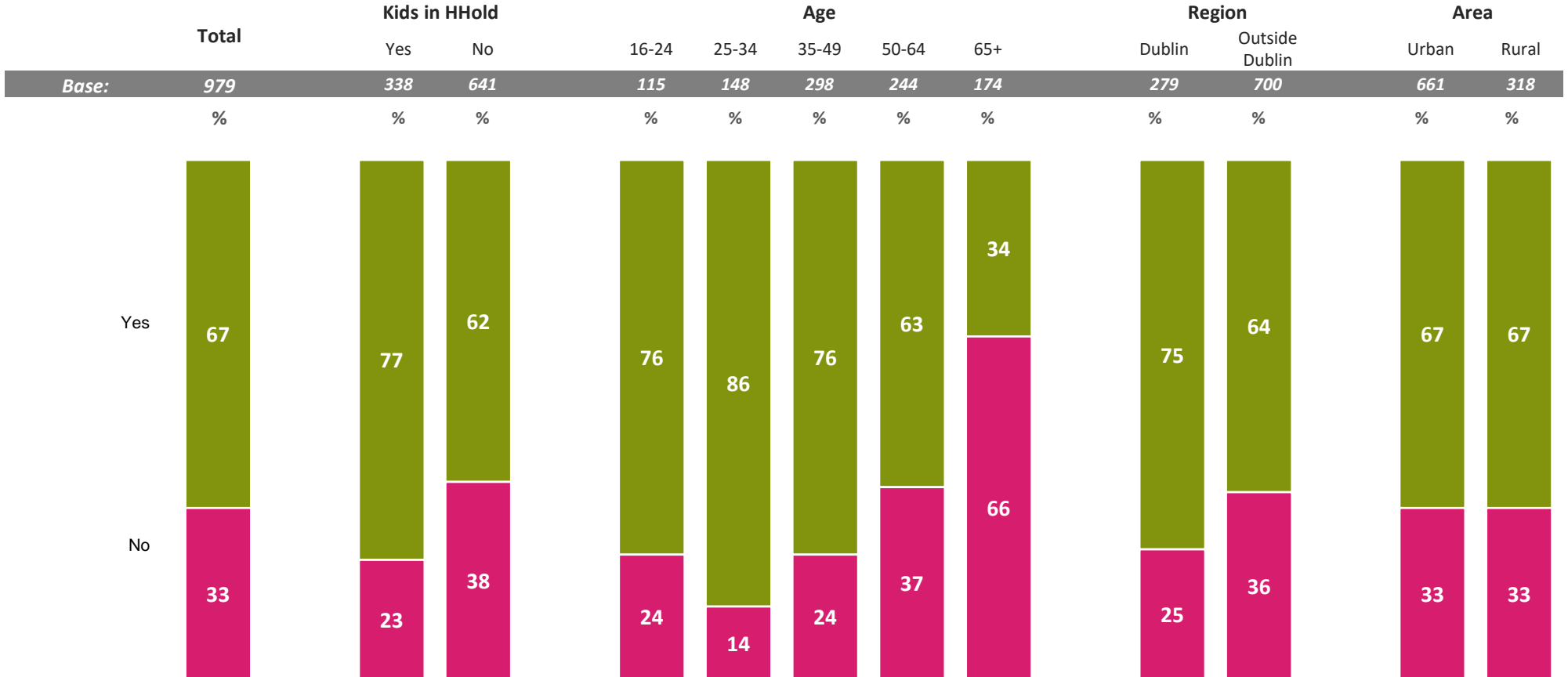
March 2022



# Ever used a QR Code

Base: All have mobile 979

March 2022



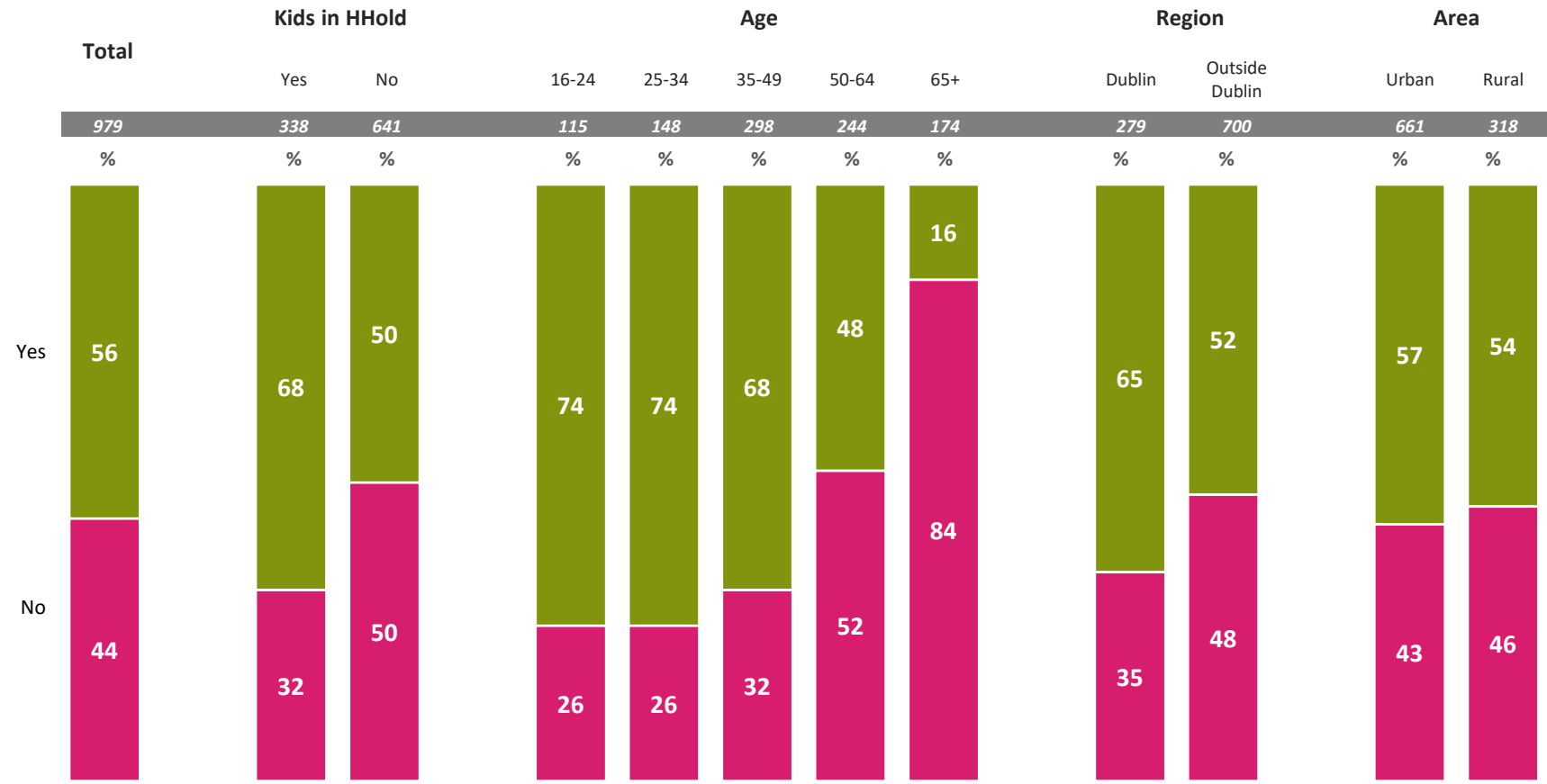


# Usage of a mobile application for purchasing goods for delivery



Base: All have mobile 979

March 2022



# Which method would you find easiest to activate an eSIM subscription on your mobile

Base: All have mobile 979

March 2022

Total	Kids in HHold		Age					Region		Area	
	Yes	No	16-24	25-34	35-49	50-64	65+	Dublin	Outside Dublin	Urban	Rural
979	338	641	115	148	298	244	174	279	700	661	318
%	%	%	%	%	%	%	%	%	%	%	%

