

# ComReg Consumer MVCT Market Research



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# Objectives & Methodology



- / ComReg is required to review certain electronic communications markets that are susceptible to ex-ante regulation, as set out by the European Commission ('EC'). The Mobile Voice Call Termination ('MVCT') Market is one of five wholesale markets that the EC has identified as being susceptible to ex-ante regulation.
  
- / In order to assist with its market review of MVCT, ComReg has engaged REDC to carry out market research in order to gain insights into residential consumer characteristics, including:
  - Incidence of ownership and usage of mobile voice telephony amongst consumers
  - Consumer Usage of mobile phone for traditional calls, texts (SMS) and emails
  - Consumer Usage of Applications ('Apps') for voice/messaging
  - Incidence of bundling telecommunications services amongst Consumers
  - Price awareness of voice calls and switching behaviour of Consumers
  
- / 1,038 face-to-face interviews were conducted by RED C amongst a nationally representative sample of all adults aged 15+ who use a mobile phone in July 2016.
  
- / Interviews were quota controlled by age, gender, social class and region to represent the known profile of the target market for the survey. CSO data from the 2011 Census was used to develop the sampling for this research project.

Statistical Testing has been conducted in the survey where a significant difference exists at the 95% confidence interval the following symbol is used: 

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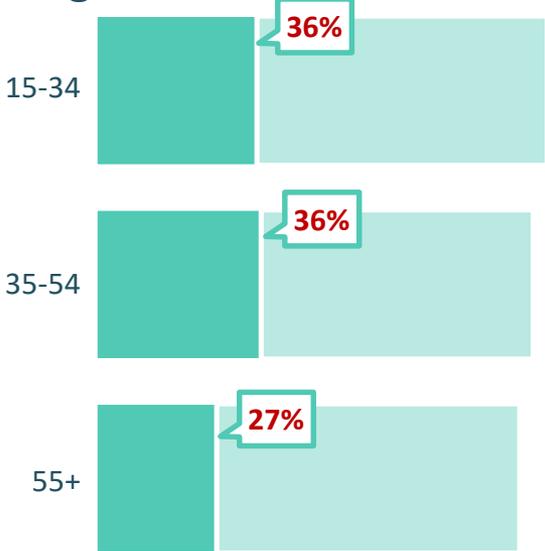
# Sample Profile

(Base: All Mobile Users – 1,038)

## Gender



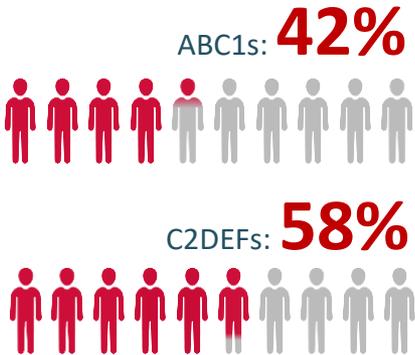
## Age



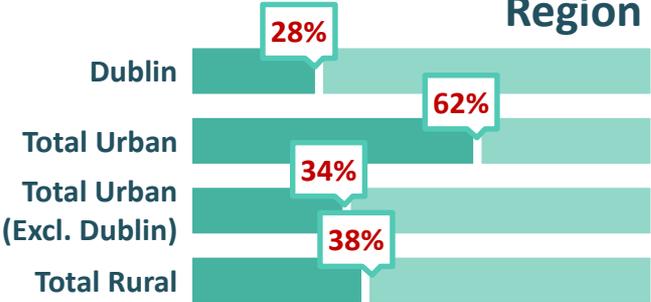
## Use of Mobile Phone %



## Social Class



## Region



# Key Findings from this Survey



- / Amongst the nationally representative sample of mobile phone users in Ireland aged 15+ that took part in this survey, 86% claim that they use their mobile phone daily (Ref: Slide 14).
- / 60% of those taking part in this survey have a mobile Prepay plan, the remaining 40% are Bill Pay customers (Ref: Slide 32).
- / 8% of the sample surveyed have their mobile phone as part of a bundle with other services (such as TV, landline or broadband) (Ref: Slide 21).
- / According to this survey, 74% of mobile users own a smartphone (Ref: Slide 24).
- / Amongst smartphone users in the survey, 48% say that they use OTT Apps for voice/video calls every day or every couple of days, rising to 66% amongst Dublin residents and 58% amongst those aged 15-34 (Ref: Slide 26).
- / 67% of all surveyed use an internet messaging app at least every couple of days, rising to 77% amongst 15-34 year olds and 70% in Dublin and Total Urban regions (Ref: Slide 29).
- / 63% of all mobile users use their phone for accessing the internet every day or every couple of days according to this survey (Ref: Slide 15).
- / Of all those taking part in the survey, 67% use their mobile phone for social networking (Facebook, Twitter, etc.) at least every couple of days (Ref: Slide 15).
- / In terms of mobile Bill Pay customers surveyed, 91% get inclusive minutes as part of their Bill Pay package (Ref: Slide 37).
- / 72% of those on Prepay receive an allowance of minutes to use as part of their Prepay plan (Ref: Slide 55).

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## Infographics of Key Findings

# Residential Users: Mobile Phone Market - I

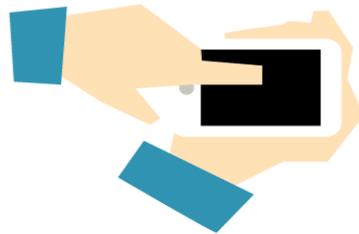
**40%**

of mobile phone users in this survey are on Bill Pay  
(Ref: Slide 32)



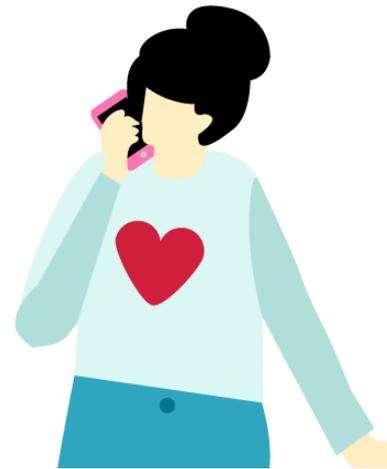
**74%**

of surveyed mobile users own a smartphone  
(Ref: Slide 24)



**33%**

of smartphone owners in this survey claim to have never received a call via an OTT internet app...  
(Ref: Slide 25)



**47%**

of smartphone users in the sample receive messages via an internet app once a day  
(Ref: Slide 28)



Similarly,

**47%**

of survey respondents that own a smartphone send instant messages via data based apps approximately once a day (Ref: Slide 29)

**27%**

of the survey sample with a smartphone use internet based apps for voice/video calls daily...  
(Ref: Slide 26)



**...33%**

have never used their smartphone to do this.  
(Ref: Slide 26)

...but

**25%**

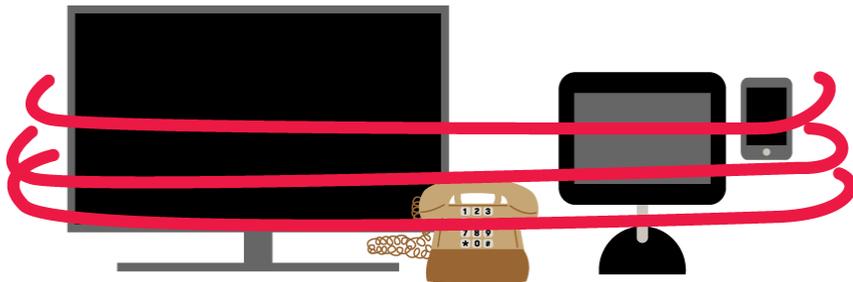
receive them daily  
(Ref: Slide 25)

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# Residential Users: Mobile Phone Market - II

8%

of survey respondents have their mobile phone service bundled with another service  
(Ref: Slide 21)



43%

of mobile users in this survey are Vodafone customers  
(Ref: Slide 18)



79%

of surveyed Bill Pay customers that receive inclusive minutes as part of their plan can use these minutes to call fixed line numbers  
(Ref: Slide 40)



11%

of those that took part in this survey have switched their mobile price plan in the past year  
(Ref: Slide 20)



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# Residential Users: Use of Mobile OTT Apps/Internet Services on Mobile



**68%**

of the total sample use apps for instant messaging every day or every couple of days (Ref: Slide 15)



**48%** of smartphone users in the survey use OTT apps for voice/video calls every day or every couple of days, rising to **66%** amongst Dublin residents and **58%** amongst those aged 15-34 (Ref: Slide 26)

**67%** of those surveyed use social networks on their mobile phone every day or every couple of days (Ref: Slide 15)



**63%** use their mobile for internet browsing every day or every couple of days according to this survey (Ref: Slide 15)



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# Residential Users: Bill Pay Mobile

91%

of Bill Pay users in this survey receive inclusive minutes as part of their plan (Ref: Slide 37)

INCLUSIVE MINUTES



89%

of Bill Pay users with inclusive minutes in the survey say that their minutes can be used to call any network (Ref: Slide 39)



10%

however, say they can only use their inclusive minutes for calls to users on their own network (Ref: Slide 39)



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# Residential Users: Prepay Mobile

INCLUSIVE  
MINUTES



# 72%

of Prepay users in this survey receive inclusive minutes as part of their plan (Ref: Slide 54)

# 60%

of Prepay users with inclusive minutes in the survey can use their minutes for calls to any network...  
(Ref: Slide 55)



...but inclusive minutes for

# 37%

of survey respondents on Prepay can only be used for calls to those on the same network  
(Ref: Slide 55)

# 94%

of survey respondents on Prepay top-up their mobile phone at least once a month  
(Ref: Slide 51)



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# Residential Users: Fixed Line Market



54%

of respondents in this survey have a fixed voice service (Ref: Slide 60)

Rising to

74%

among 55+ years (Ref: Slide 60)



47%

of survey respondents purchasing a fixed voice service use eir as their service provider (Ref: Slide 61)



74%

Proportion of calls made from fixed lines to other fixed lines amongst fixed line owners in this survey (Ref: Slide 65)



64%

of those in the survey without a home phone say that the reason for this is that they prefer to only use mobile... (Ref: Slide 69)

...39%

say that it is to 'save money' (Ref: Slide 69)



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# Mobile Phone Overview

# Frequency Of Mobile Phone Use

(Base: All Mobile Users – 1,038)

Q. And how often do you use your phone?



	Region				Age		
	Dublin (288)	Total Urban (642)	Total Urban (Excl. Dublin) (354)	Total Rural (396)	15-34 (379)	35-54 (379)	55+ (280)
More than once a day	86%	86%	85%	88%	96%	91%	67%
Approximately once a day	11%	10%	9%	7%	4%	7%	19%
Approximately once every couple of days	3%	3%	4%	3%	*	2%	10%
Approximately once a week	1%	1%	1%	1%	0	*	2%
Less frequently	*	*	1%	1%	0	*	2%

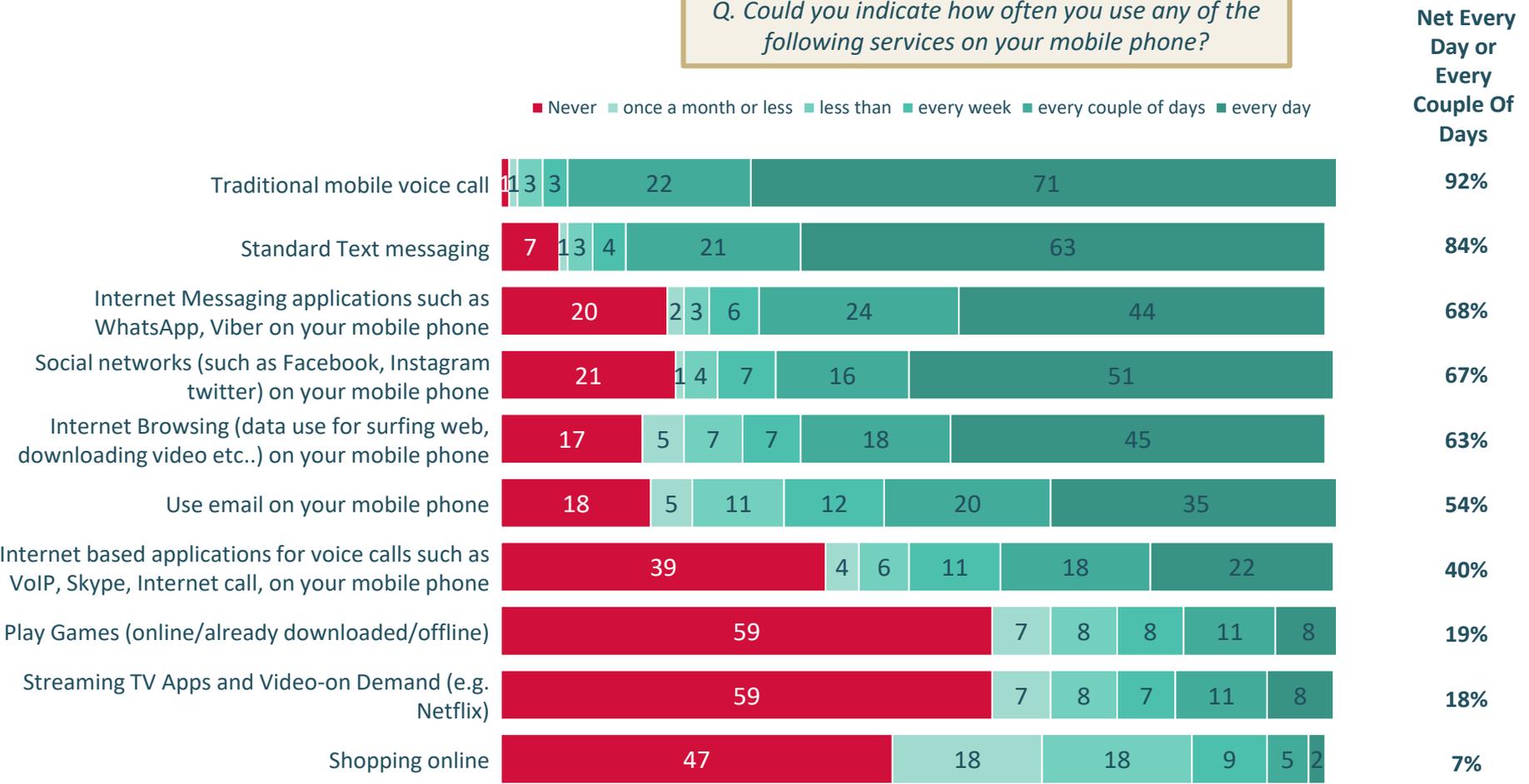
86% of all survey respondents use their mobile phone more than once a day with usage highest amongst those aged 15-34 (96%).



# Frequency Of Use Of Services On Mobile Phone

(Base: All Mobile Users – 1,038)

Q. Could you indicate how often you use any of the following services on your mobile phone?



**Standard mobile voice calls have the highest incidence of daily use (71%) amongst those surveyed, while 63% say they use text messaging daily.**



# Frequency Of Use Of Services On Mobile Phone by Age and

## Mobile Tariff

(Base: All Mobile Users – 1,038)

### NET EVERY DAY OR EVERY COUPLE OF DAYS

	Total (1,038)	Age			Mobile Tariff	
		15-34 (379)	35-54 (379)	55+ (280)	Prepay (619)	Bill Pay (419)
Traditional mobile voice call	92%	92%	96%	88%	89%	97%
Standard Text messaging	84%	94%	90%	63%	79%	92%
Internet Messaging applications such as WhatsApp, Viber on your mobile phone	68%	79%	63%	47%	69%	67%
Social networks (such as Facebook, Instagram twitter) on your mobile phone	67%	84%	63%	29%	72%	63%
Internet Browsing (data use for surfing web, downloading video etc..) on your mobile phone	63%	72%	62%	38%	68%	58%
Use email on your mobile phone	54%	60%	55%	32%	47%	62%
Internet based applications for voice calls such as VoIP, Skype, Internet call, on your mobile phone	40%	48%	36%	27%	43%	37%
Play Games (online/already downloaded/offline)	19%	28%	13%	6%	21%	17%
Streaming TV Apps and Video-on Demand (e.g. Netflix)	18%	27%	11%	9%	23%	13%
Shopping online	7%	10%	7%	3%	8%	6%

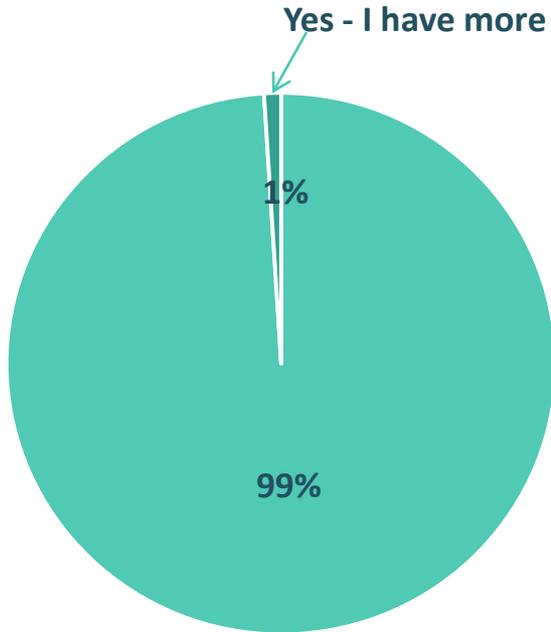
**79% of survey participants aged 15-34 use internet messaging apps every day or every couple of days, while usage is lower amongst those aged 55+ (47%).**



# Number Of Active Mobile Phone Numbers

(Base: All Mobile Users – 1,038)

Q. Do you have more than one active (used in the last month) mobile phone number (each number might correspond to a separate phone) or do you have several active (used in the last month) SIM cards which you swap into a single phone?



**Yes - I have 1 active phone number/SIM card**

	Region				Age		
	Dublin (288)	Total Urban (642)	Total Urban (Excl. Dublin) (354)	Total Rural (396)	15-34 (379)	35-54 (379)	55+ (280)
Yes - I have 1 active phone number/SIM card	99%	99%	99%	98%	98%	99%	98%
Yes - I have 2 active phone numbers/SIM cards	1%	1%	1%	1%	1%	1%	1%

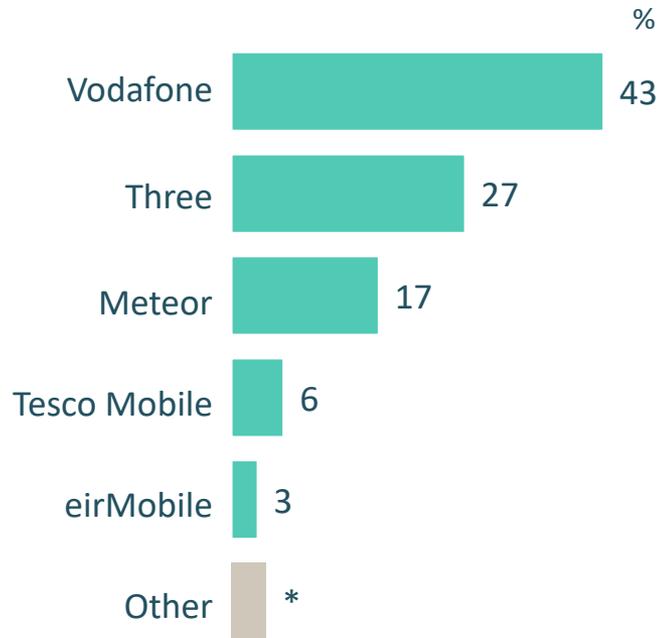
According to survey respondents, 1% of the total sample claim to have 2 active phone numbers/SIM Cards, the remaining 99% have one.



# Current Mobile Phone Provider

(Base: All Mobile Users – 1,038)

Q. Who is your current mobile phone operator?



Region			
Dublin (288)	Total Urban (642)	Total Urban (Excl. Dublin) (354)	Total Rural (396)
35%	38%	41%	51%
24%	25%	26%	31%
28%	22%	17%	10%
6%	7%	9%	5%
5%	4%	3%	3%
2%	4%	4%	1%

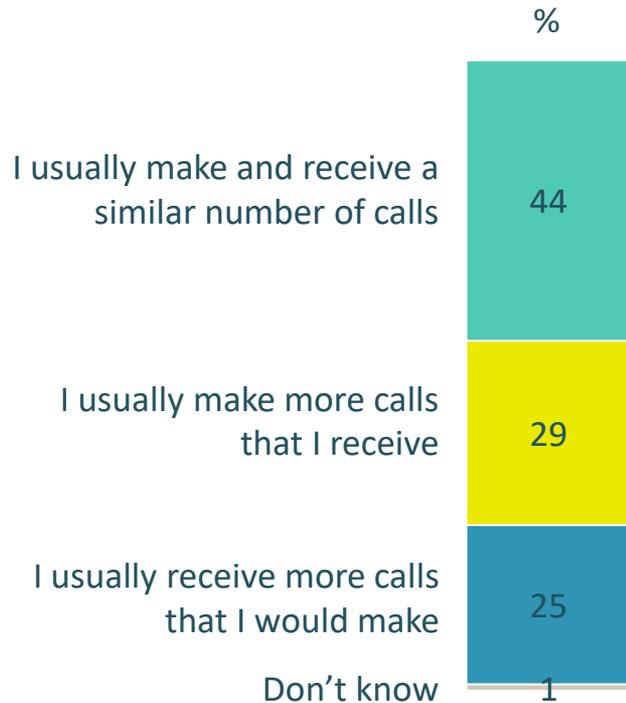
Vodafone are the most commonly used mobile network amongst our survey sample, with 43% claiming to use their services. A further 27% are currently customers of Three according to this survey.



# Making And Receiving Calls On Mobile Phone

(Base: All Mobile Users – 1,038)

Q. Thinking about the calls you make and receive on your mobile phone, which of the following best describes you usage in a typical month?



	Age		
	15-34 (379)	35-54 (379)	55+ (280)
I usually make and receive a similar number of calls	44%	49%	39%
I usually make more calls that I receive	34%	32%	20%
I usually receive more calls that I would make	22%	19%	39%
Don't know	1%	*	2%

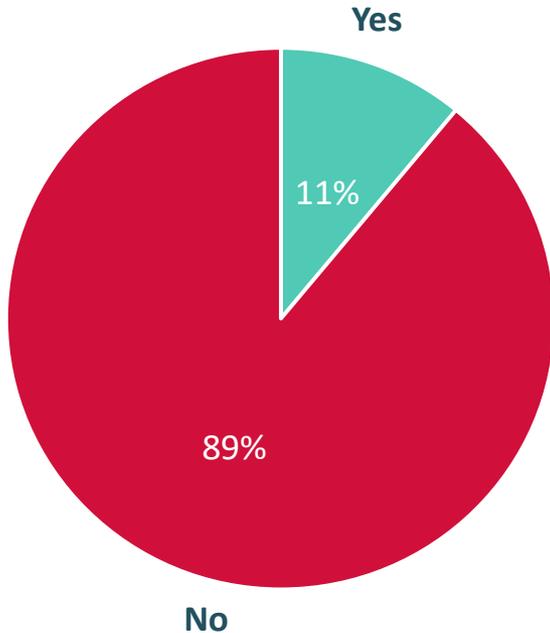
**44% of all taking the survey, say that they make the same amount of calls as they receive. 29% feel that they normally make more calls than they receive, while a quarter (25%) receive more calls than they make.**



# Switched Price Plan in the Last 12 Months

(Base: All Mobile Users – 1,038)

Q. Have you switched the price plan/packages you are on with your operator in the last 12 months?



	Region				Age		
	Dublin (288)	Total Urban (642)	Total Urban (Excl. Dublin) (354)	Total Rural (396)	15-34 (379)	35-54 (379)	55+ (280)
Yes	18%	14%	10%	6%	12%	12%	7%
No	82%	86%	90%	94%	88%	88%	93%

Switching Price Plan  
Prepay 9%  
Post Pay 13%

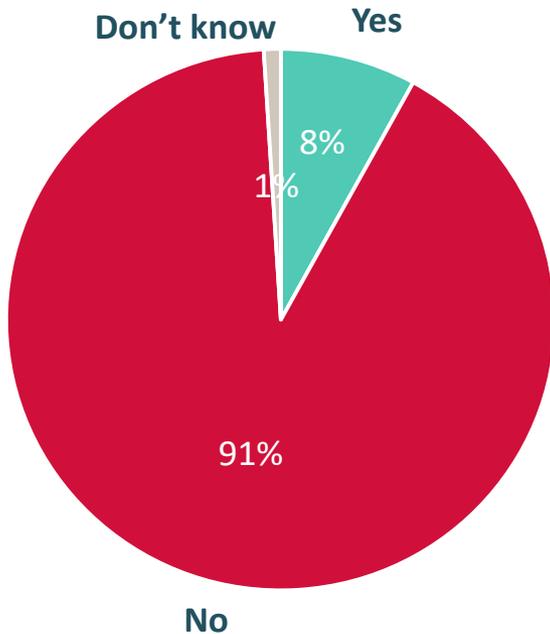
In this survey, 11% have switched their mobile price plan in the past year. 55+ year olds had lowest incidence of switching at 7%.



# Incidence of Mobile Phone Service Purchased as Part of a Bundle

(Base: All Mobile Users – 1,038)

*Q. Did your purchase your mobile phone service as part of a bundle including other telecommunication services (such as fixed line, broadband, etc.) from the same supplier?*



	Region				Age		
	Dublin (288)	Total Urban (642)	Total Urban (Excl. Dublin) (354)	Total Rural (396)	15-34 (379)	35-54 (379)	55+ (280)
Yes	9%	8%	7%	8%	6%	10%	8%
No	88%	91%	93%	91%	92%	89%	91%
Don't know	4%	2%	*	1%	2%	1%	1%

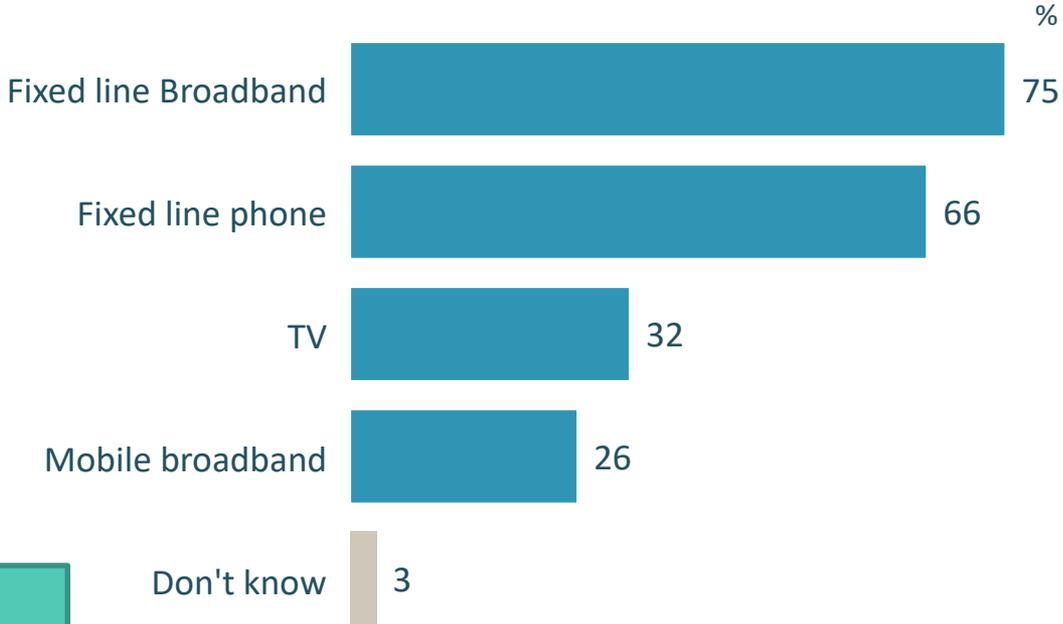
**8% of those surveyed purchased their mobile phone service as part of a bundle with other telecommunication services.**



# Other Services In Bundle (Where Mobile Phone Purchased Within a Bundle)

(Base: All Consumers With Mobile Phone In A Bundle - 83)

Q. Apart from mobile phones, what other services are included in this bundle?



Dual Play – 28%  
Triple Play – 39%  
Quad Play – 23%

The service most commonly bundled with mobile phone is fixed line broadband (75%) according to the mobile phone bundle respondents in this survey





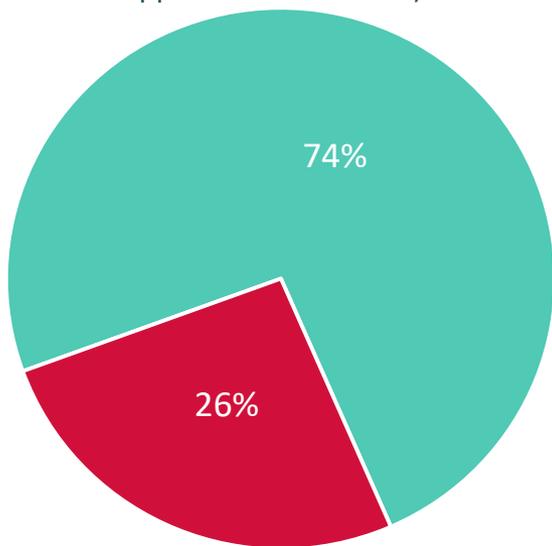
# Mobile Phone Functionality & Services

# Incidence of Smartphone Ownership

(Base: All Mobile Users – 1,038)

Q. Which of the following best describes the capabilities of your mobile phone?

My mobile phone is a smartphone  
(allows me to access email, download apps and surf the web)



My mobile phone is not a smartphone  
(does not allow me to access email, download apps and surf the web)

	Region				Age		
	Dublin (288)	Total Urban (642)	Total Urban (Excl. Dublin) (354)	Total Rural (396)	15-34 (379)	35-54 (379)	55+ (280)
My mobile phone is a smartphone	76%	75%	73%	72%	94%	77%	41%
My mobile phone is not a smartphone	24%	25%	27%	28%	6%	23%	59%

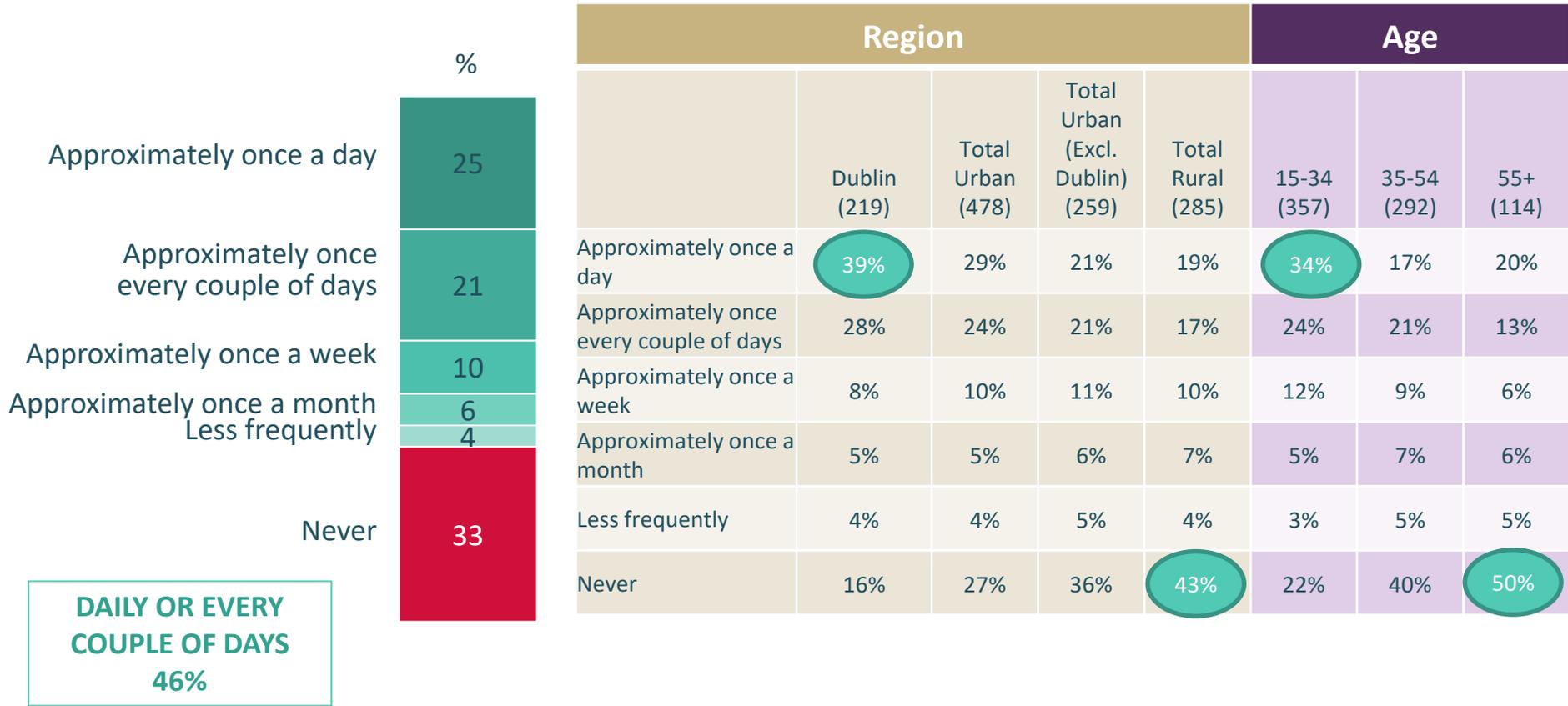
**74% of mobile users in this survey have a Smartphone. Smartphone ownership reduces greatly for those aged 55+ (41%). 59% of 55+ year olds do not have a Smartphone, while 94% of those aged 15-34 do own a Smartphone, according to this survey.**



# Frequency Of Receiving Calls Via OTT Internet Apps

(Base: All Users Of Smartphones, 763)

Q. How often do you receive voice or video calls on your mobile via internet based Apps (such as Skype, Viber, WhatsApp etc.)



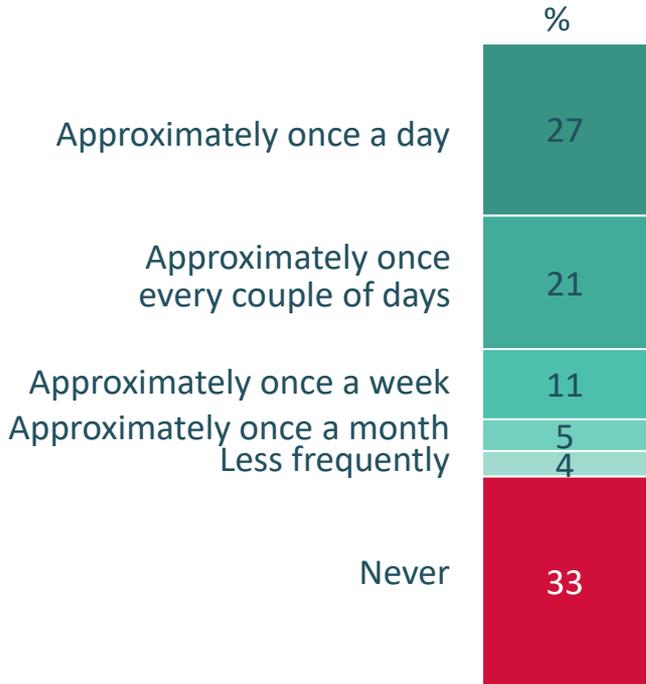
33% of smartphone owners in this survey claim to have never received a call via an OTT internet app, but 1 in 4 (25%) receive them daily.



# Frequency Of Using OTT Apps For Voice/Video Calls From Mobile Phone

(Base: All Users Of Smartphones, 763)

Q. How often do you use Internet based applications (such as Skype, Viber, WhatsApp etc.) for voice or video calls from your mobile phone?



**DAILY OR EVERY COUPLE OF DAYS**  
48%

	Region				Age		
	Dublin (219)	Total Urban (478)	Total Urban (Excl. Dublin) (259)	Total Rural (285)	15-34 (357)	35-54 (292)	55+ (114)
Approximately once a day	37%	30%	23%	22%	34%	19%	22%
Approximately once every couple of days	29%	24%	20%	16%	24%	20%	12%
Approximately once a week	10%	11%	12%	11%	11%	11%	8%
Approximately once a month	5%	4%	3%	7%	4%	5%	6%
Less frequently	4%	4%	4%	4%	3%	5%	2%
Never	16%	28%	38%	41%	23%	39%	49%
<b>DAILY OR EVERY COUPLE OF DAYS</b>	<b>66%</b>	<b>54%</b>	<b>43%</b>	<b>38%</b>	<b>58%</b>	<b>39%</b>	<b>34%</b>

\*Caution: Small Base Size

	15-24 (154)	15-34 in Dublin (40*)
Approximately once a day	35%	24%

27% of the survey sample with a smartphone use internet based apps on their phone for calls on a daily basis, while 33% say they have never used their smartphone to do this.



(Q.21b)

# Reasons For Using Skype, Internet Calls Or VOIP On Mobile Phone

(Base: All Using Apps For Calls, 512)

Q. Why do you use Skype, internet calls or VoIP on your mobile?



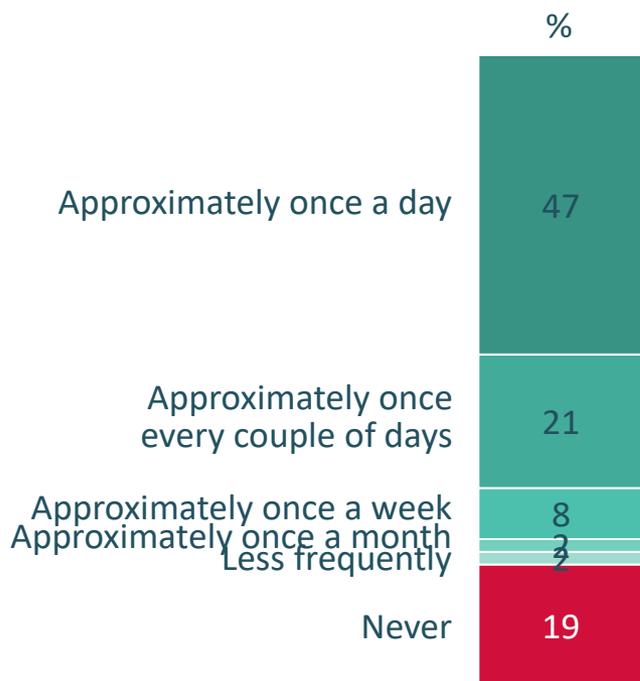
Amongst those in the survey that use OTT apps for calls, the most common reason given for using internet calls on mobile is lower price (60%).

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# Frequency Of Receiving Messages Via Internet Apps On Mobile Phone

(Base: All Users Of Smartphones, 763)

Q. How often do you receive internet based messages on your mobile via internet based Apps (such as Skype, Viber, WhatsApp etc.)



	Region				Age		
	Dublin (219)	Total Urban (478)	Total Urban (Excl. Dublin) (259)	Total Rural (285)	15-34 (357)	35-54 (292)	55+ (114)
Approximately once a day	41%	46%	51%	49%	58%	40%	33%
Approximately once every couple of days	31%	24%	19%	15%	20%	24%	14%
Approximately once a week	9%	8%	8%	8%	9%	8%	7%
Approximately once a month	1%	2%	2%	3%	2%	2%	4%
Less frequently	4%	3%	2%	2%	1%	2%	5%
Never	15%	17%	19%	23%	10%	24%	38%

**DAILY OR EVERY COUPLE OF DAYS**  
68%

\*Caution: Small Base Size

	15-24 (154)	15-34 in Dublin (40*)
Approximately once a day	58%	31%

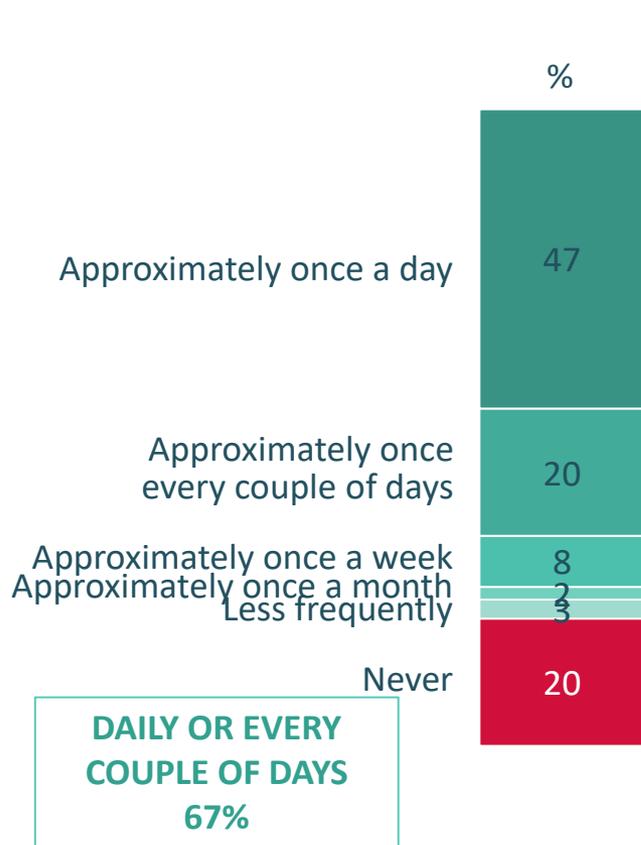
19% of smartphone users in the sample say that they have never received a message via an internet app, while 47% receive these messages once a day.



# Frequency Of Use Of Apps For Messages On Mobile Phone

(Base: All Users Of Smartphones, 763)

Q. How often do you use Internet based messages (such as Skype, Viber, WhatsApp etc.) from your mobile phone?



	Region				Age		
	Dublin (219)	Total Urban (478)	Total Urban (Excl. Dublin) (259)	Total Rural (285)	15-34 (357)	35-54 (292)	55+ (114)
Approximately once a day	42%	47%	51%	47%	58%	40%	32%
Approximately once every couple of days	28%	23%	18%	15%	19%	22%	15%
Approximately once a week	10%	8%	8%	8%	9%	8%	8%
Approximately once a month	3%	2%	2%	2%	1%	3%	3%
Less frequently	4%	3%	2%	3%	2%	2%	5%
Never	14%	17%	20%	25%	10%	25%	38%
<b>DAILY OR EVERY COUPLE OF DAYS</b>	<b>70%</b>	<b>70%</b>	<b>69%</b>	<b>62%</b>	<b>77%</b>	<b>62%</b>	<b>47%</b>

Similar levels can be seen for sending messages via internet apps; 47% of survey respondents that own a smartphone send messages approximately once a day, while 20% have never sent a message this way despite owning a smartphone.





# Mobile Phone Cost

# Who Pays For Mobile Phone Use?

(Base: All Mobile Users – 1,038)

Q. Who pays for your mobile phone usage?



	Age		
	15-34 (379)	35-54 (379)	55+ (280)
I pay for it myself	94%	96%	98%
It is paid by a family member	5%	1%	*
It is paid for by my employer	*	3%	2%

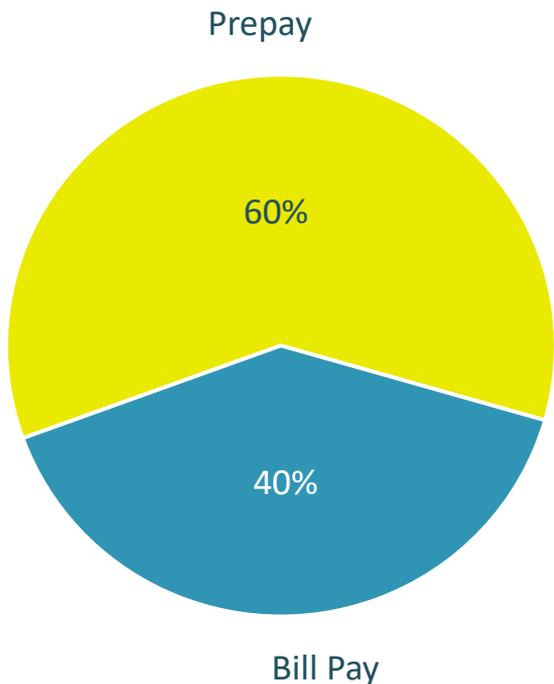
96% of those taking the survey pay for their mobile phone use themselves.



# Mobile Tariff

(Base: All Mobile Users – 1,038)

*Q. Is your mobile plan/package a Prepay package (where you buy credit before you can make a call) or Bill Pay package (where you have a contract with your operator and subsequently receive a bill for calls, texts or other services you used in the previous month)?*



	Region				Age		
	Dublin (288)	Total Urban (642)	Total Urban (Excl. Dublin) (354)	Total Rural (396)	15-34 (379)	35-54 (379)	55+ (280)
Prepay	58%	58%	59%	62%	66%	51%	62%
Bill Pay	42%	42%	41%	38%	34%	49%	38%

**NOTE:** This study is based on mobile phone users aged 15+

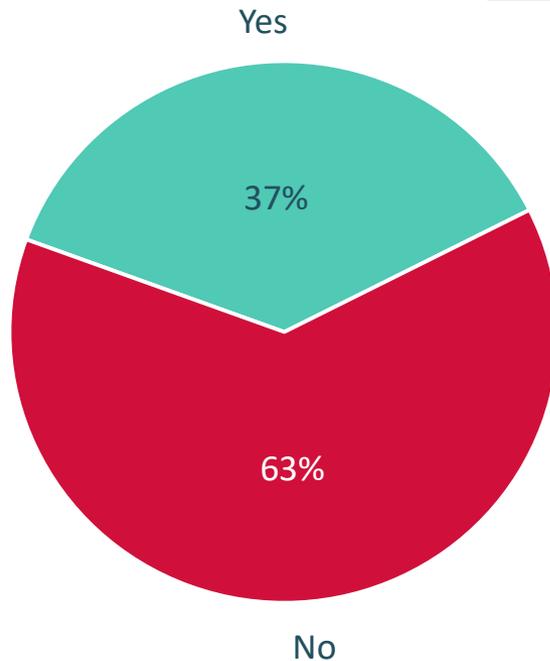
**Prepay is more popular amongst the sample; 60% are on a Prepay service with their mobile provider.**



# Did You Receive Phone When Signing Up To Mobile Plan

(Base: All Mobile Users – 1,038)

*Q. When you first signed up to your mobile plan/package did you also receive/hire /purchase a mobile phone at the same time (you might have changed your phone since then – we are interested in when you first signed-up to your plan or package)?*



	Age		
	15-34 (379)	35-54 (379)	55+ (280)
Yes	36%	42%	31%
No	64%	58%	69%

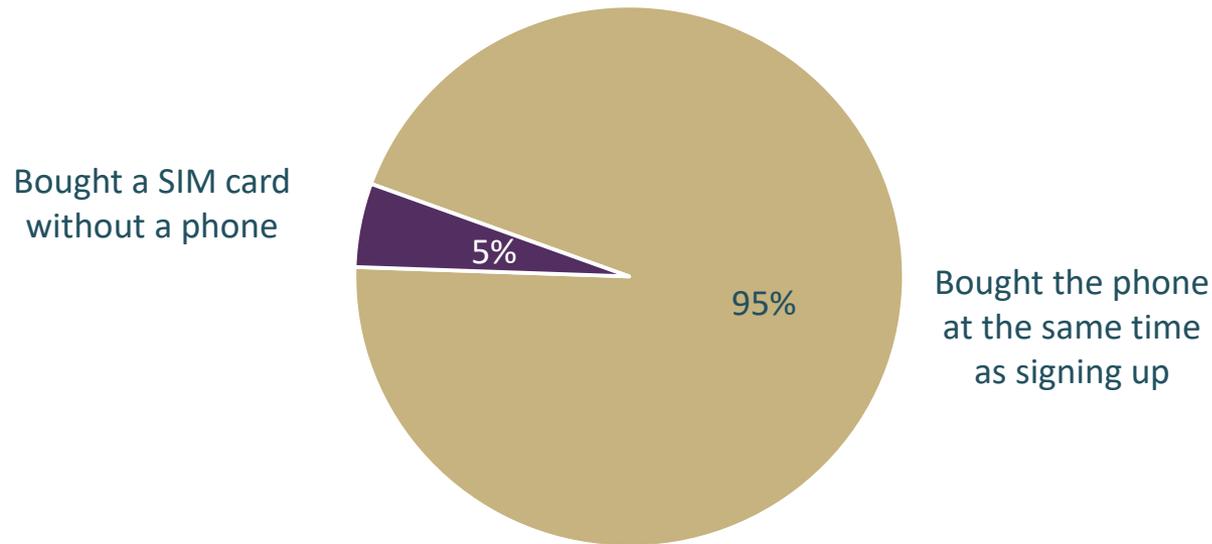
More than 1 in 3 (37%) of all respondents in this survey received/hired/purchased a phone when getting their mobile plan.



# Phone & SIM Card

(Base: All Mobile Users Bought A Mobile Phone With Mobile Plan/Package, 384)

*Q. Did you buy the phone at the same time as signing up to your operator or did you buy a SIM card without a phone (you might have changed your phone since then – we are interested in when you first signed-up to your plan or package)?*



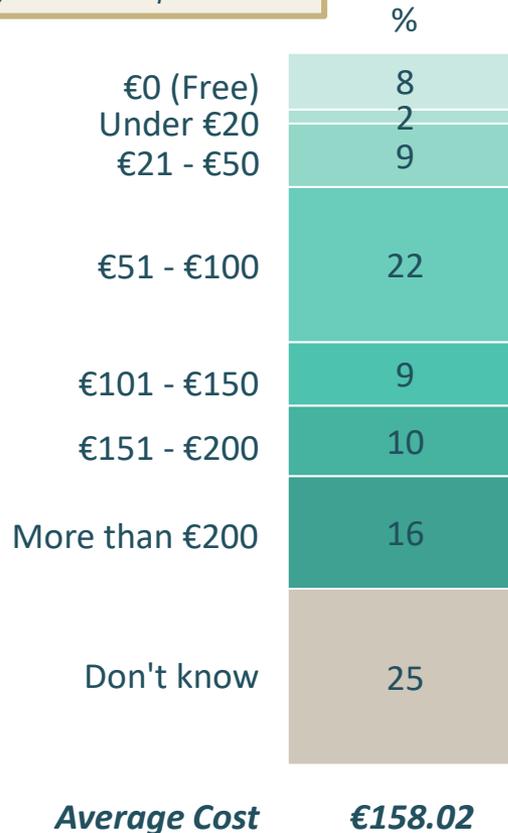
**95% of those that received/hired/purchased their phone with their mobile plan/package bought their phone at the same time as signing up for their mobile package.**



# Cost Of Mobile Phone

(Base: All Mobile Users Bought A Mobile Phone At The Same Time As Signing Up, 366)

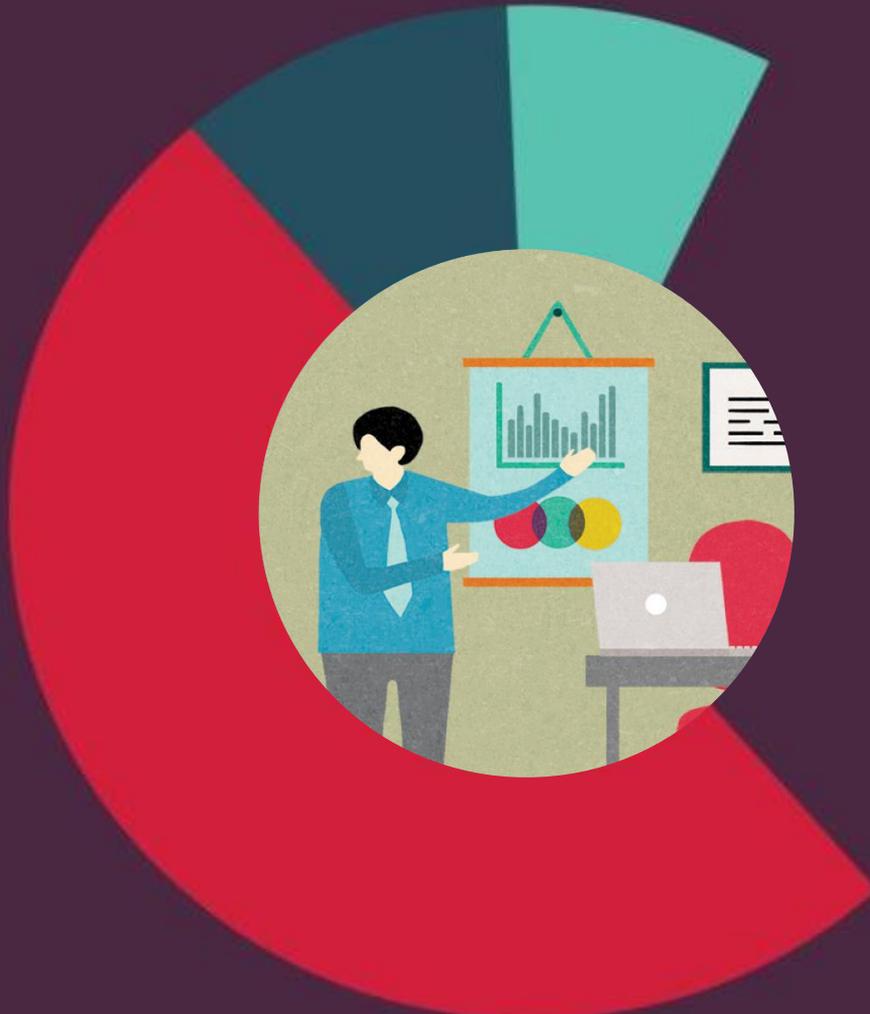
Q. How much did you pay for your mobile phone?



	Mobile Tariff	
	Prepay (146)	Bill Pay (221)
€0 (Free)	0	13%
Under €20	3%	1%
€21 - €50	12%	7%
€51 - €100	30%	17%
€101 - €150	8%	9%
€151 - €200	12%	9%
More than €200	10%	19%
Don't know	24%	25%
<b>Average Cost</b>	<b>€145.60</b>	<b>€166.31</b>

In terms of those in the survey that bought a phone at the same time as signing up for their mobile package, 10% of Prepay users say that they spent in excess of €200 for their mobile phone, this rises to 19% amongst Bill Pay users.



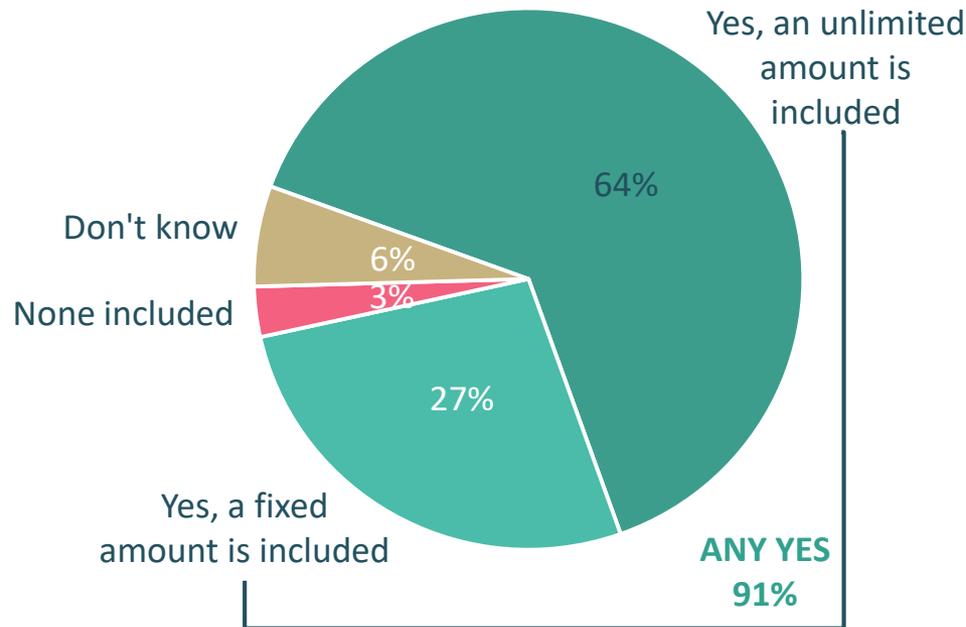


# Mobile Bill Pay Users

# Does Bill Pay Plan Include Inclusive Minutes To Make Calls? - I

(Base: All Users Of Bill Pay, 419)

Q. Does your mobile plan/package include a set number of inclusive minutes which you can use to make calls at no extra cost?



	Current Mobile Phone Provider		
	Vodafone (198)	Three (126)	Meteor & eMobile (76)
Yes, an unlimited amount is included	73%	64%	45%
Yes, a fixed amount is included	22%	27%	37%
None included	2%	3%	9%
<b>ANY YES</b>	<b>94%</b>	<b>90%</b>	<b>80%</b>
Don't know	4%	7%	11%

NOTE: Other Providers not shown due to small base sizes

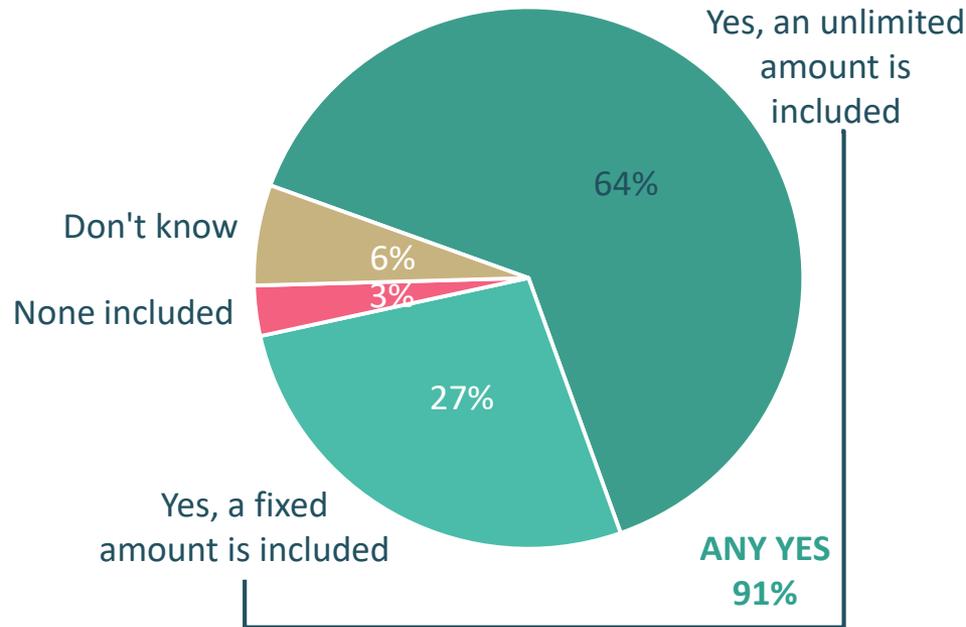
**91% of Bill Pay users in this survey receive inclusive minutes as part of their Bill Pay price plan (64% have unlimited minutes).**



# Does Bill Pay Plan Include Inclusive Minutes To Make Calls? - II

(Base: All Users Of Bill Pay, 419)

Q. Does your mobile plan/package include a set number of inclusive minutes which you can use to make calls at no extra cost?



	Apps for Calls					
	Receive App Calls (233)	Do Not Receive App Calls (137)	Use App Calls (233)	Do Not Use App Calls (137)	Receive /Use App Calls (241)	Do Not Receive /Use App Calls (137)
Yes, an unlimited amount is included	65%	68%	64%	69%	65%	69%
Yes, a fixed amount is included	28%	24%	29%	22%	29%	22%
None included	3%	4%	3%	4%	3%	4%
<b>ANY YES</b>	<b>93%</b>	<b>91%</b>	<b>93%</b>	<b>91%</b>	<b>93%</b>	<b>91%</b>
Don't know	4%	4%	4%	4%	4%	5%

NOTE: Other Providers not shown due to small base sizes

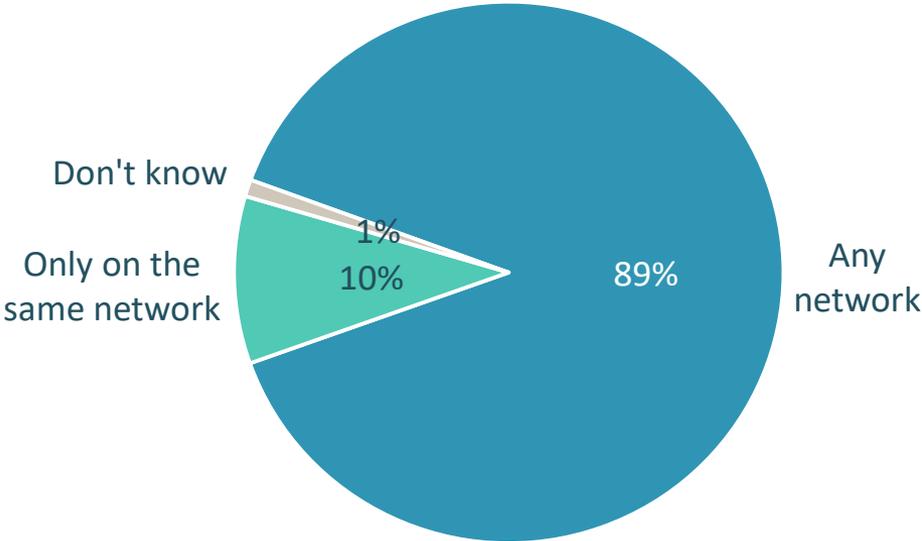
**93% of Bill Pay users in this survey that receive/use OTT apps for calls have a Bill Pay price plan with inclusive minutes to make calls.**



# Types of calls covered by inclusive minutes – Bill Pay

(Base: All Users Of Bill Pay With Inclusive Minutes, 380)

*Q. Can you use your inclusive minutes to make calls to people on any mobile network or only to people on the same mobile network as you?*



	Current Mobile Phone Provider		
	Vodafone (187)	Three (114)	Meteor & eMobile (61)
Any network	90%	86%	90%
Only on the same network	9%	12%	10%
Don't know	1%	2%	1%

NOTE: Other Providers not shown due to small base sizes

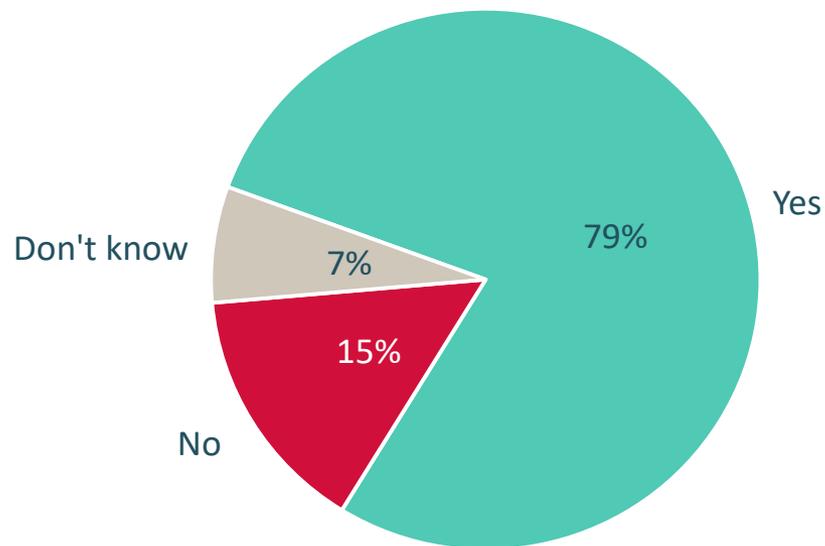
**89% of survey respondents on a Bill Pay package with inclusive minutes say that their inclusive minutes can be used to call any network, while 10% can only call users on their own network with their inclusive minutes.**



# Does Your Plan Include Inclusive Minutes Covering Calls To Fixed Lines – Bill Pay

(Base: All Users Of Bill Pay With Inclusive Minutes, 380)

Q. Can you use your inclusive minutes to make calls to fixed line phones?



	Current Mobile Phone Provider		
	Vodafone (187)	Three (114)	Meteor & eMobile (61)
Yes	80%	76%	77%
No	13%	15%	20%
Don't know	7%	9%	3%

NOTE: Other Providers not shown due to small base sizes

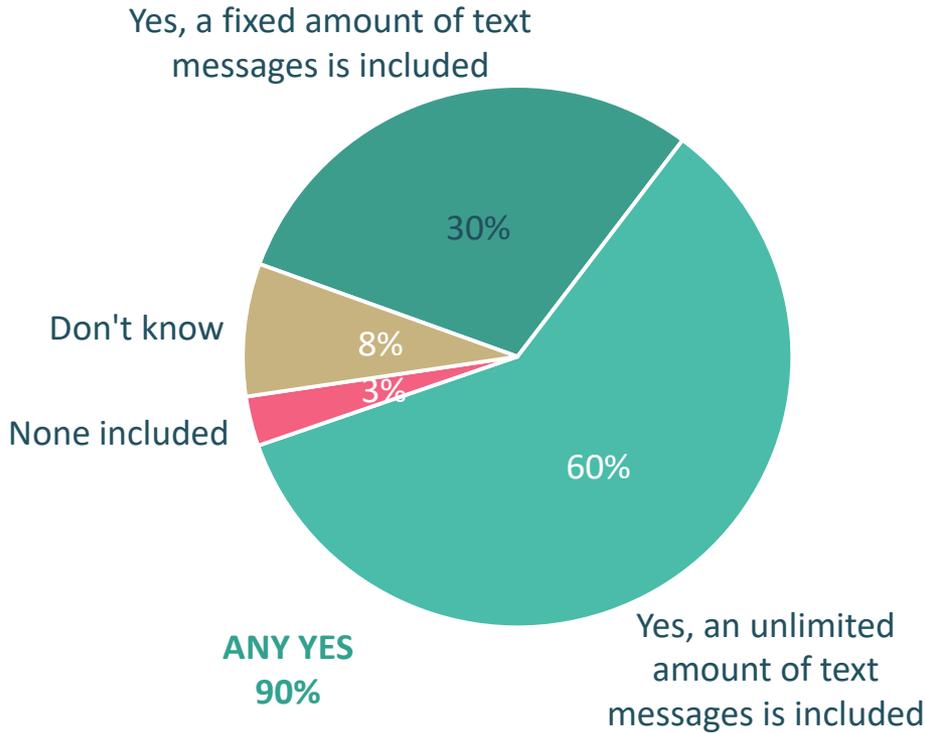
**79% of surveyed Bill Pay customers that receive inclusive minutes have inclusive minutes that can be used to call fixed lines as part of their plan.**



# Does Plan Include Inclusive Texts - Bill Pay

(Base: All Users Of Bill Pay, 419)

Q. Does your mobile plan/package include a set number of inclusive text messages which you can use at no extra cost?



	Current Mobile Phone Provider		
	Vodafone (198)	Three (126)	Meteor & eMobile (76)
Yes, a fixed amount of text messages is included	26%	26%	42%
Yes, an unlimited amount of text messages is included	67%	61%	42%
None included	2%	3%	8%
Don't know	6%	10%	9%

NOTE: Other Providers not shown due to small base sizes

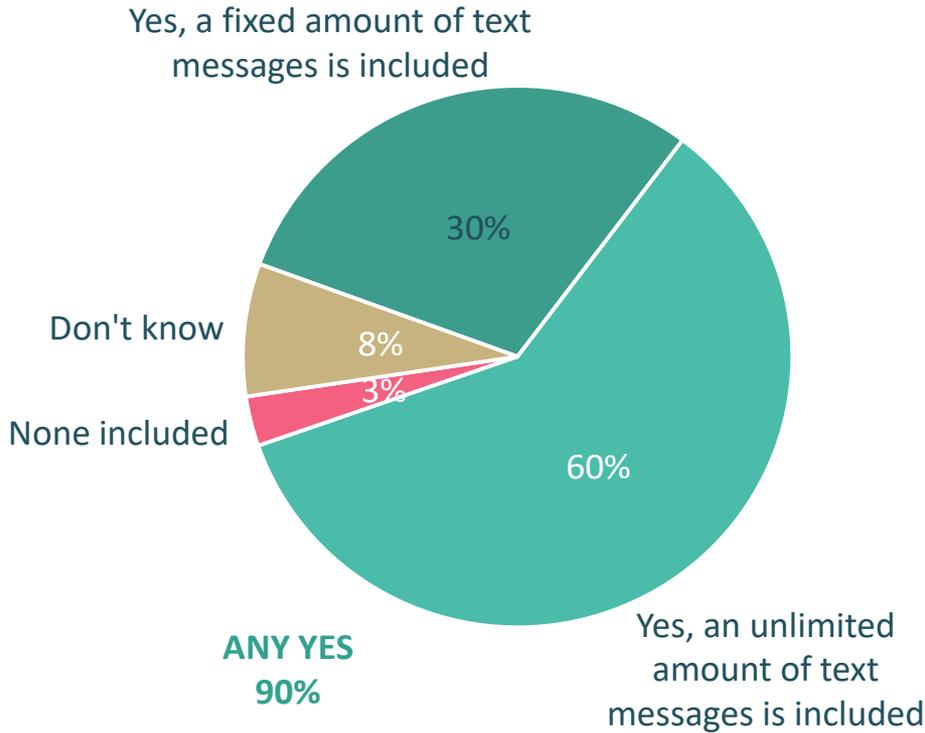
**90% of Bill Pay users in this survey have inclusive text messages as part of their Bill Pay plan; 60% have unlimited messages.**



# Does Plan Include Inclusive Texts - Bill Pay

(Base: All Users Of Bill Pay, 419)

Q. Does your mobile plan/package include a set number of inclusive text messages which you can use at no extra cost?



	Apps for Messaging					
	Receive App Msgs (291)	Do Not Receive App Msgs (79)	Use App Msgs (289)	Do Not Use App Msgs (81)	Receive /Use App Msgs (292)	Do Not Receive /Use App Msgs (78)
Yes, a fixed amount of text messages is included	27%	37%	27%	36%	27%	37%
Yes, an unlimited amount of text messages is included	65%	53%	65%	54%	65%	52%
None included	2%	2%	2%	2%	2%	2%
Don't know	6%	8%	6%	8%	6%	8%

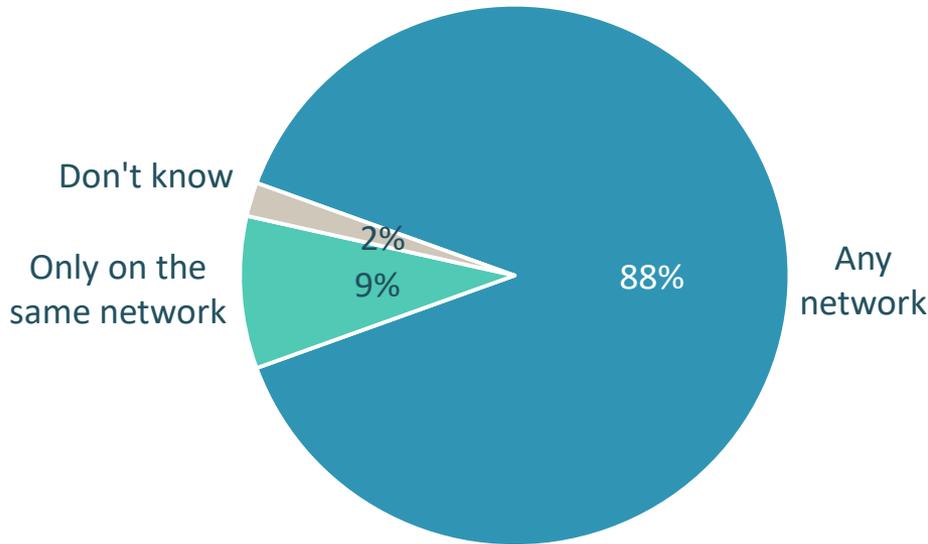
65% of Bill Pay users in this survey that receive/use OTT apps for messaging have an unlimited amount of text messages included in their package.



# What Type Of Texts Are Included – Bill Pay

(Base: All Users Of Bill Pay With Inclusive Messages, 373)

Q. Can you use your inclusive text messages to send texts to people on any mobile network or only to people on the same mobile network as you?



	Current Mobile Phone Provider		
	Vodafone (183)	Three (109)	Meteor & eMobile (64)
Any network	89%	89%	81%
Only on the same network	8%	10%	14%
Don't know	2%	1%	5%

NOTE: Other Providers not shown due to small base sizes

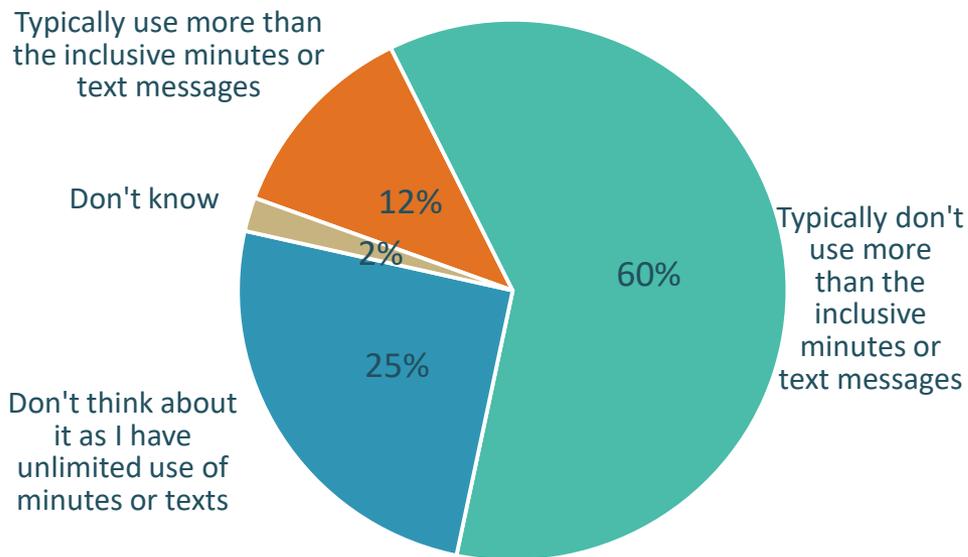
**88% of those with in the survey on Bill Pay with inclusive messages can send these messages to users on any mobile network.**



# Usage Of Inclusive Minutes/Messages – Bill Pay

(Base: All Users Of Bill Pay With Inclusive Minutes/Messages - 394)

Q. Do you typically use more than your set amount of inclusive minutes and text messages?



NOTE: Other Providers not shown due to small base sizes

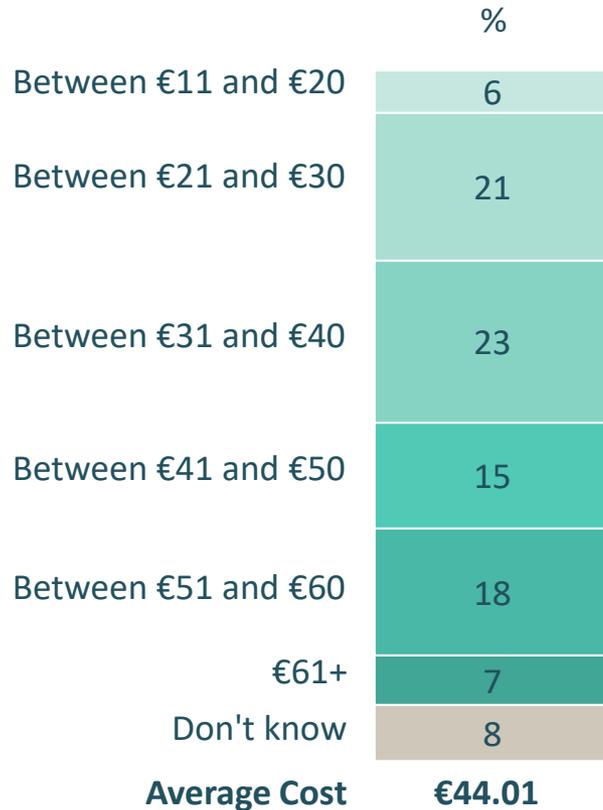
	Current Mobile Phone Provider		
	Vodafone (192)	Three (116)	Meteor & eMobile (68)
Typically use more than the inclusive minutes or text messages	12%	11%	9%
Typically don't use more than the inclusive minutes or text messages	57%	58%	72%
Don't think about it as I have unlimited use of minutes or texts	29%	29%	15%
Don't know	2%	2%	3%

**60% in this survey that are on Bill Pay with inclusive minutes and/or texts, generally stay within the allocated amount of minutes and text messages, although 12% say that they usually use more than the inclusive minutes/messages.**



# Cost Of Plan/Package – Bill Pay

(Base: All Users Of Bill Pay - 419)



*Q. How much does your basic mobile plan/package cost per month (i.e. the recurring cost of your plan/package before taking into account the cost of any additional calls or other services which are not included in your basic package)?*

	Current Mobile Phone Provider		
	Vodafone (198)	Three (126)	Meteor & eMobile (76)
Between €11 and €20	3%	5%	14%
Between €21 and €30	20%	19%	17%
Between €31 and €40	22%	23%	30%
Between €41 and €50	13%	21%	12%
Between €51 and €60	20%	22%	11%
Between €61+	12%	3%	8%
Don't know	9%	6%	11%
<b>Average Cost</b>	<b>€46.71</b>	<b>€43.72</b>	<b>€47.26</b>

NOTE: Other Providers not shown due to small base sizes

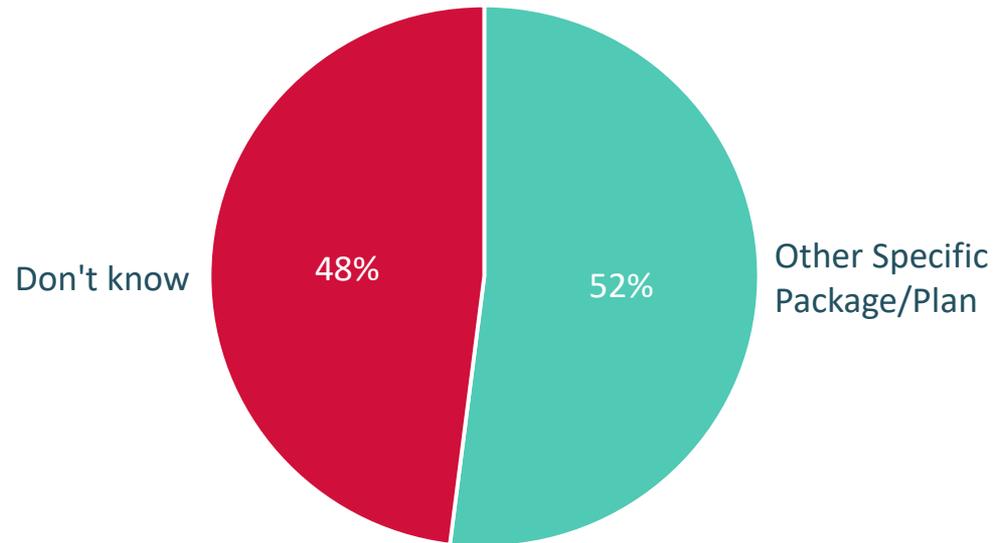
The average cost of a bill play plan amongst Bill Pay users in this survey is **€44.01** per month. Vodafone Bill Pay customers in the survey tend to pay slightly more (**€46.71**) than Three users (**€43.72**) for their plan.



# Name Of Bill Pay Package/Plan - II

(Base: All Users Of Bill Pay, 419)

Q. What is the name of your plan/package?



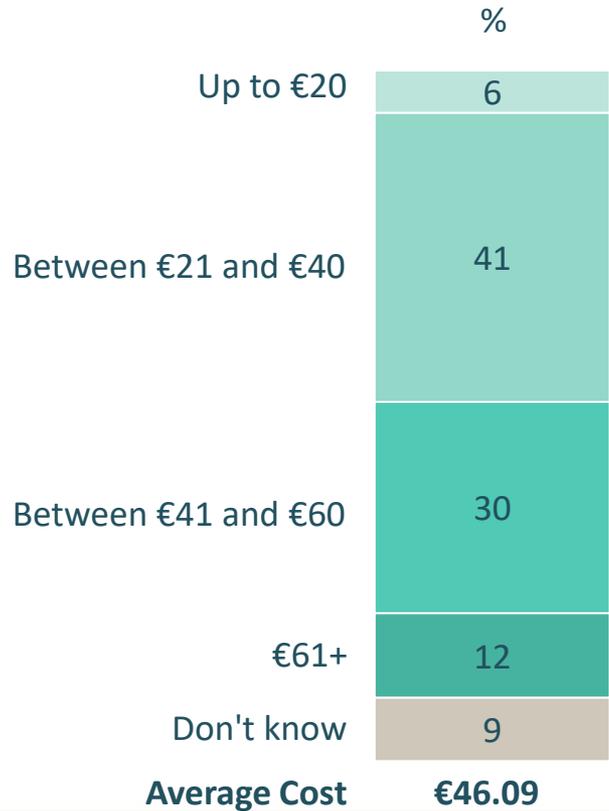
**48% of survey respondents on Bill Pay say that they do not know the name of the specific plan that they are currently on.**

REDC

# Cost Of Total Monthly Mobile Bill – Bill Pay

(Base: All Users Of Bill Pay - 419)

*Q. And what would your total monthly mobile bill typically be (i.e. including the basic cost of your plan/package and the cost of any additional calls or other services which are not included in your basic plan/package)?*



	Current Mobile Phone Provider	
	Vodafone (198)	Three (126)
Up to €20	4%	5%
Between €21 and €40	38%	40%
Between €41 and €60	33%	36%
€61+	11%	6%
Between €81 and €120	5%	3%
Don't know	9%	9%
<b>Average Cost</b>	<b>€ 48.04</b>	<b>€ 46.80</b>

NOTE: Other Providers not shown due to small base sizes

The total cost of a monthly bill for Bill Pay users in this survey averages at **€46.09.**



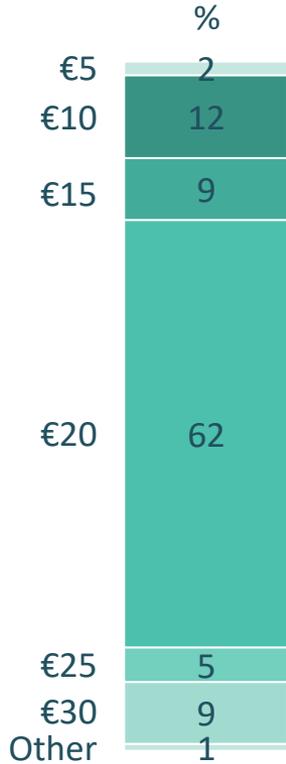


# Mobile Prepay Users

# Value of Credit Typically Buy When Topping Up Mobile Phone-I

(Base: All Prepay Users - 619)

Q. How much credit do you typically buy when you are topping up your mobile phone?



	Age		
	15-34 (252)	35-54 (195)	55+ (173)
€ 5	2%	2%	3%
€ 10	6%	14%	18%
€ 15	9%	8%	10%
€ 20	65%	59%	60%
€ 25	6%	8%	2%
€ 30	10%	9%	6%
Other	1%	1%	1%

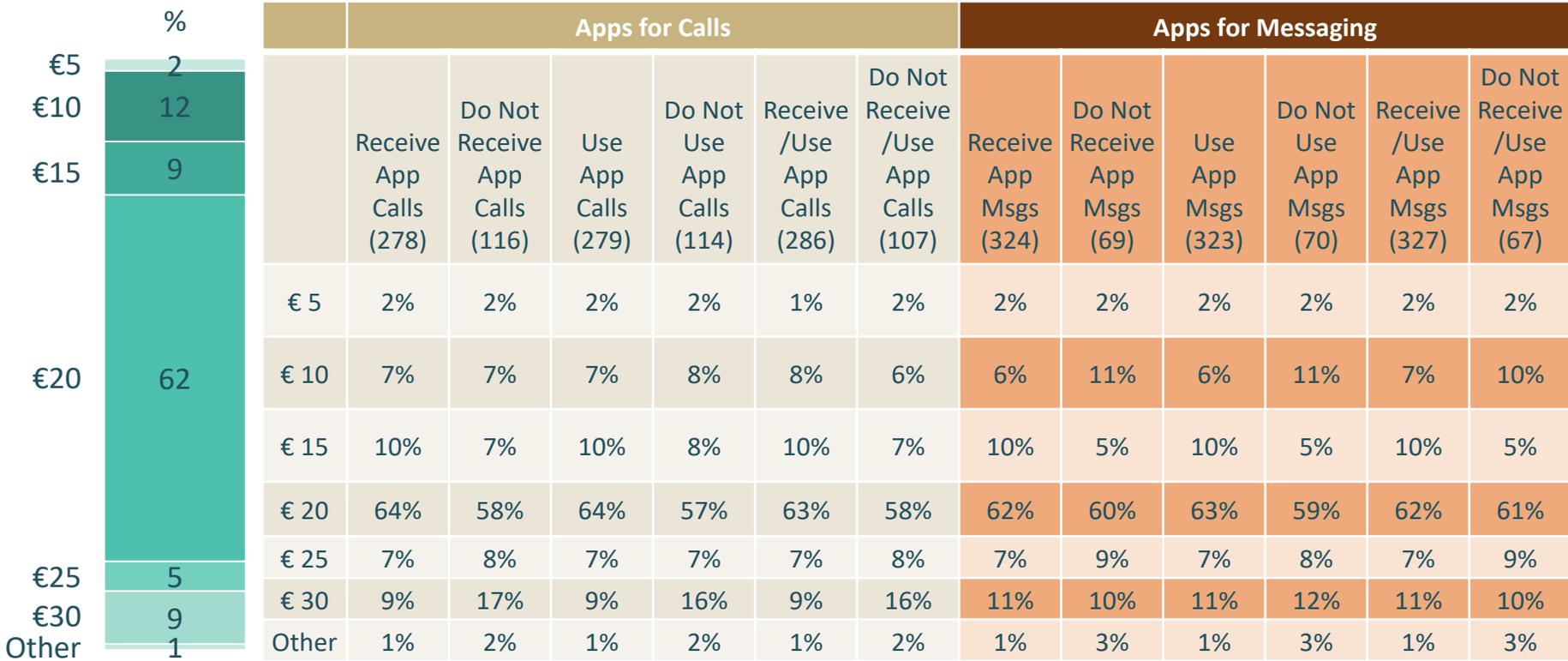
Amongst the Prepay customers in this survey 62% typically purchase a €20 top-up when topping up their Prepay mobile phone.



# Value of Credit Typically Buy When Topping Up Mobile Phone-II

(Base: All Prepay Users - 619)

Q. How much credit do you typically buy when you are topping up your mobile phone?



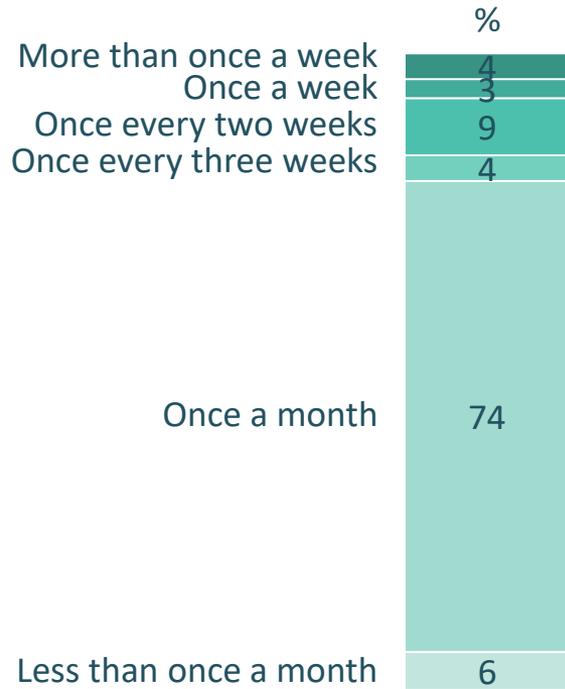
63% of prepay users that receive/use OTT apps for calls in this survey generally top up their mobile by €20.



# Frequency of Top-up Of Mobile Phone - I

(Base: All Prepay Users - 619)

Q. Approximately how often do you top up your mobile phone?



	Age		
	15-34 (252)	35-54 (195)	55+ (173)
More than once a week	5%	5%	3%
Once a week	2%	5%	1%
Once every two weeks	10%	11%	5%
Once every three weeks	6%	2%	4%
Once a month	72%	75%	73%
Less than once a month	5%	1%	14%

Amongst Prepay customers surveyed, 94% top up their Prepay mobile phone at least once every month.



# Frequency of Top-up Of Mobile Phone by OTT Users

(Base: All Prepay OTT Users – base sizes displayed below)

*Q. Approximately how often do you top up your mobile phone?*

	Apps for Calls						Apps for Messaging					
	Receive App Calls (278)	Do Not Receive App Calls (116)	Use App Calls (279)	Do Not Use App Calls (114)	Receive /Use App Calls (286)	Do Not Receive /Use App Calls (107)	Receive App Msgs (324)	Do Not Receive App Msgs (69)	Use App Msgs (323)	Do Not Use App Msgs (70)	Receive /Use App Msgs (327)	Do Not Receive /Use App Msgs (67)
More than once a week	8%	1%	8%	1%	8%	1%	7%	1%	7%	1%	7%	1%
Once a week	3%	1%	3%	2%	3%	1%	3%	2%	3%	2%	3%	2%
Once every two weeks	10%	13%	11%	12%	11%	13%	11%	13%	11%	13%	11%	13%
Once every three weeks	5%	5%	5%	5%	5%	5%	4%	8%	4%	7%	4%	8%
Once a month	70%	76%	70%	76%	70%	76%	72%	69%	72%	71%	72%	69%
Less than once a month	3%	4%	3%	4%	3%	5%	3%	7%	3%	6%	3%	6%

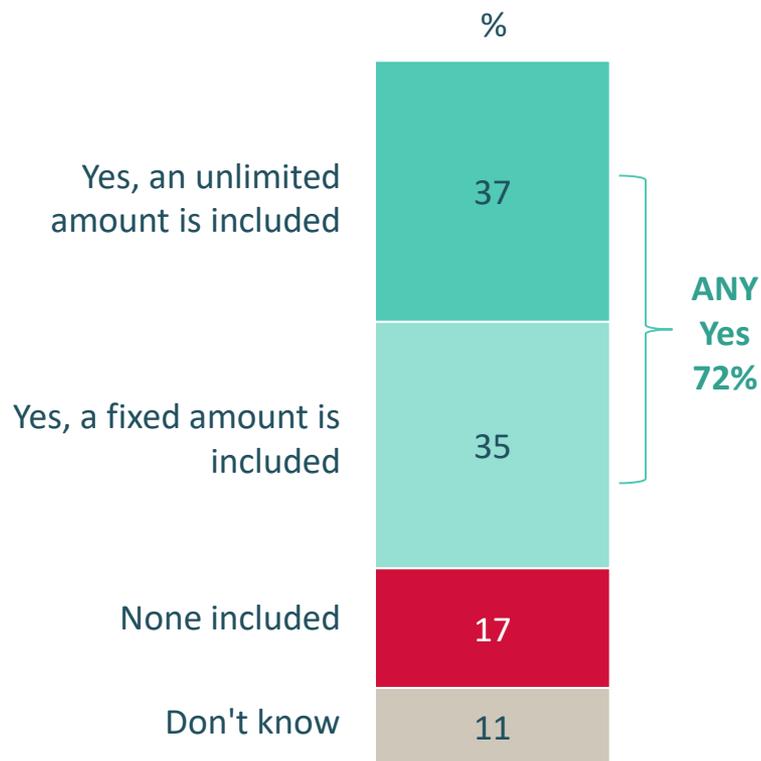
**70% of Prepay users that receive/use calls via OTT app services in this survey top up their mobile approximately once a month.**



# Does Prepay Plan Include Inclusive Minutes at No Extra Cost? - I

(Base: All Prepay Users - 619)

Q. Does your Prepay mobile plan/package include any set number of inclusive minutes which you can use to make calls at no extra cost?



	Current Mobile Phone Provider			
	Vodafone (248)	Meteor (131)	Three (157)	Tesco Mobile (58)
Yes, an unlimited amount is included	33%	36%	41%	43%
Yes, a fixed amount is included	33%	42%	32%	34%
None included	21%	13%	19%	7%
<b>ANY YES</b>	<b>66%</b>	<b>78%</b>	<b>73%</b>	<b>77%</b>
Don't know	13%	8%	8%	16%

NOTE: Other Providers not shown due to small base sizes

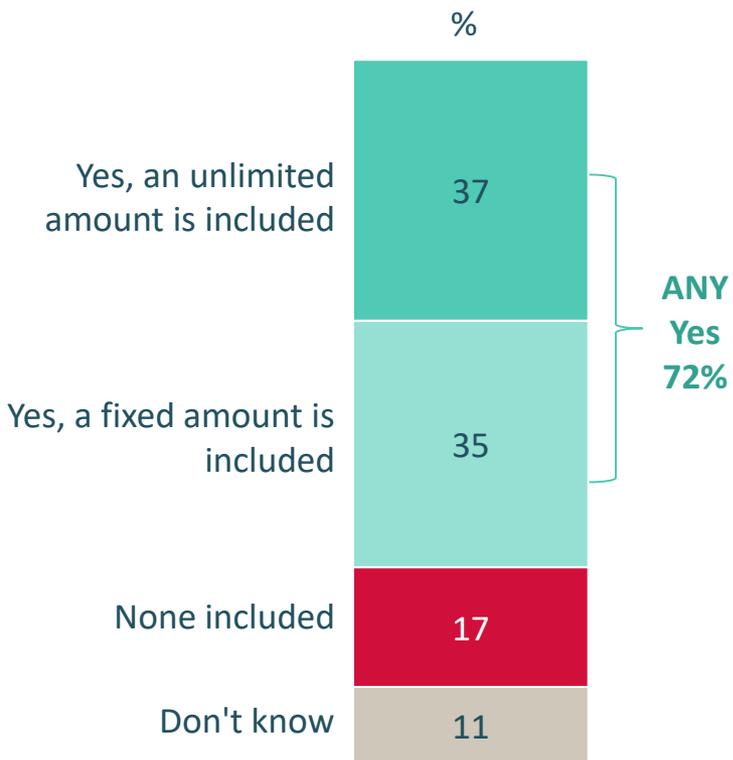
**72% of Prepay customers that took the survey receive inclusive minutes as part of their Prepay plan – 37% say that an unlimited amount of minutes are included.**



# Does Prepay Plan Include Inclusive Minutes at No Extra Cost? - II

(Base: All Prepay Users - 619)

Q. Does your Prepay mobile plan/package include any set number of inclusive minutes which you can use to make calls at no extra cost?



	Apps for Calls					
	Receive App Calls (278)	Do Not Receive App Calls (116)	Use App Calls (279)	Do Not Use App Calls (114)	Receive /Use App Calls (286)	Do Not Receive /Use App Calls (107)
Yes, an unlimited amount is included	45%	45%	44%	47%	45%	46%
Yes, a fixed amount is included	39%	31%	40%	27%	40%	27%
None included	10%	18%	9%	19%	10%	19%
<b>ANY YES</b>	<b>84%</b>	<b>75%</b>	<b>85%</b>	<b>74%</b>	<b>85%</b>	<b>73%</b>
Don't know	6%	7%	6%	7%	6%	7%

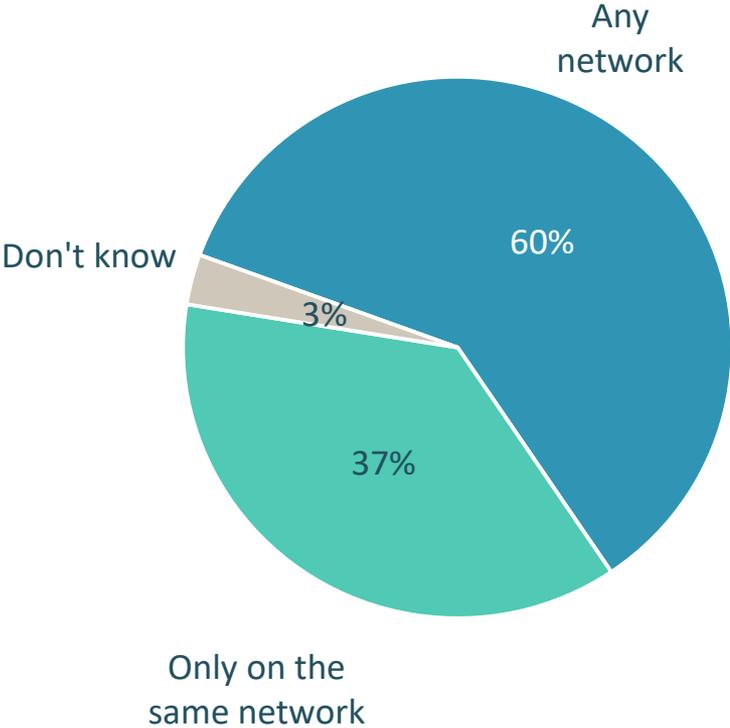
Amongst Prepay users in this survey that make/receive calls via OTT apps, 85% have a mobile plan/package that has inclusive minutes for making calls.



# Do Inclusive Minutes Allow You to Make Calls to Same Network or Different Network - I

(Base: All Prepay Users With Inclusive Minutes - 445)

*Q. Can you use your inclusive minutes to make calls to people on any mobile network or only to people on the same mobile network as you?*



	Current Mobile Phone Provider		
	Vodafone (165)	Meteor (103)	Three (114)
Any network	56%	62%	63%
Only on the same network	41%	36%	32%
Don't know	3%	2%	5%

NOTE: Other Providers not shown due to small base sizes

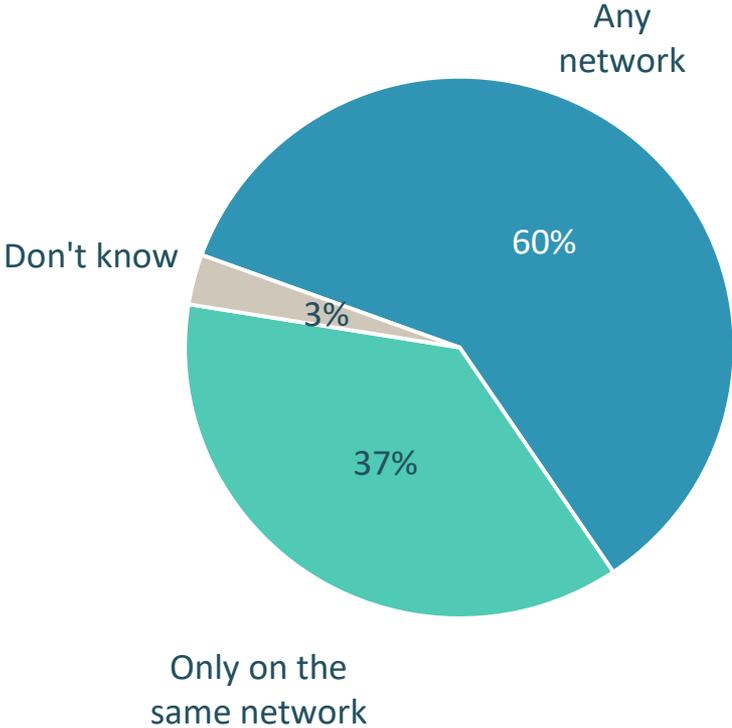
**Of those receiving inclusive minutes on Prepay in the survey, 60% say that the minutes can be used to call any network, however, 37% claim that the minutes are limited to calls on their own network.**



# Do Inclusive Minutes Allow You to Make Calls to Same Network or Different Network - II

(Base: All Prepay Users With Inclusive Minutes - 445)

*Q. Can you use your inclusive minutes to make calls to people on any mobile network or only to people on the same mobile network as you?*



	Apps for Calls					
	Receive App Calls (87)	Do Not Receive App Calls (236)	Use App Calls (85)	Do Not Use App Calls (242)	Receive /Use App Calls (78)	Do Not Receive /Use App Calls (270)
Any network	69%	60%	68%	60%	68%	62%
Only on the same network	29%	39%	31%	39%	30%	37%
Don't know	1%	1%	2%	1%	2%	1%

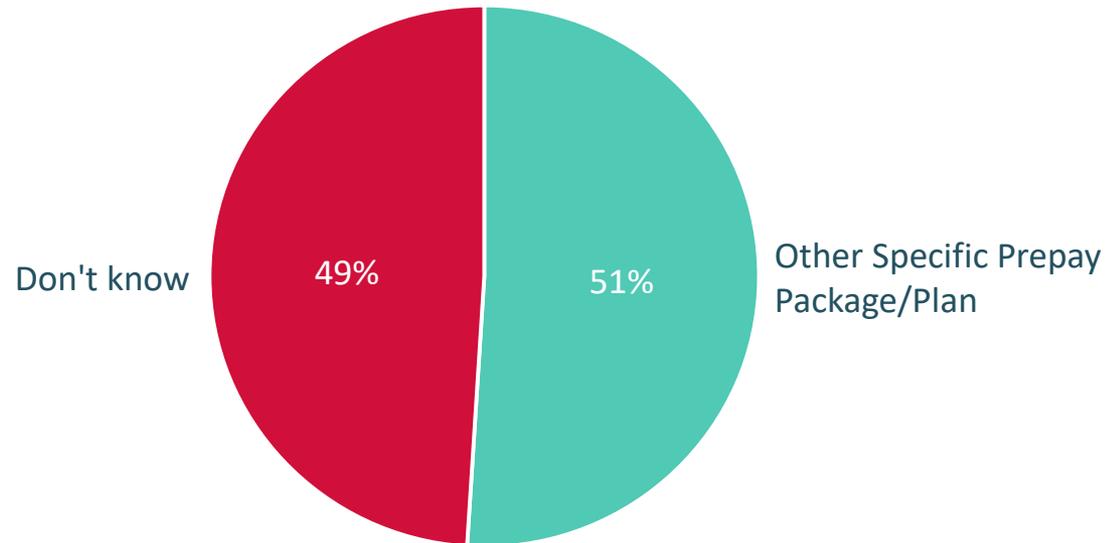
Amongst those in the survey on Prepay that have inclusive minutes and make/receive calls using OTT apps, 68% have inclusive minutes as part of their package that can be used to call any network.



# Name of Prepay Package/Plan - II

(Base: All Prepay Users - 619)

Q. What is the name of your Prepay plan/package?



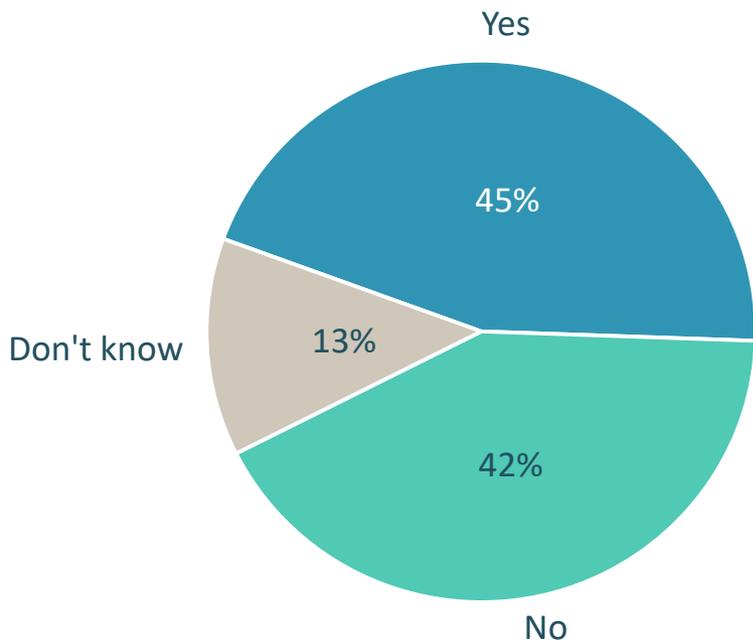
**49% of all Prepay users in the survey say that they don't know the name of their current Prepay package/plan.**

**REDC**

# Does Prepay Plan Include Inclusive Minutes to Fixed Lines?

(Base: All Prepay Users With Inclusive Minutes - 445)

Q. Can you use your inclusive minutes to make calls to fixed line phones?



	Current Mobile Phone Provider		
	Vodafone (165)	Meteor (103)	Three (114)
Yes	45%	46%	48%
No	41%	45%	39%
Don't know	14%	8%	14%

NOTE: Other Providers not shown due to small base sizes

45% of Prepay users with inclusive minutes in this survey can use these minutes to call fixed lines, but 42% say that on their plan, the minutes do not include calls to landlines.



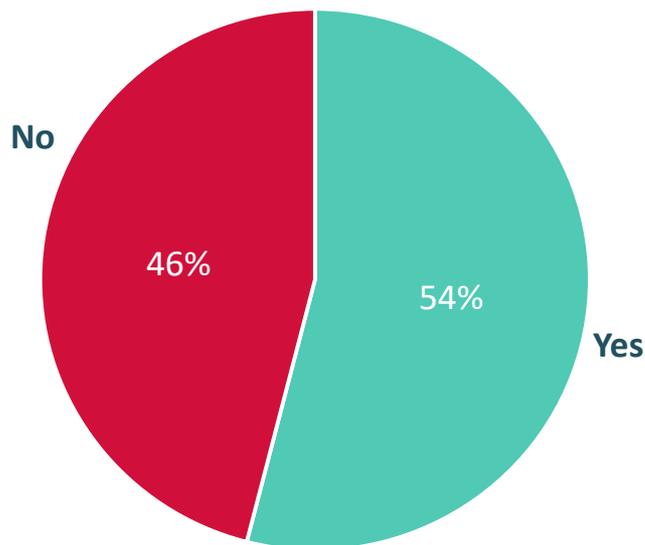


**Home Phone**

# Incidence of Fixed Line Phone Ownership To Make/Receive Calls

(Base: All Mobile Users – 1,038)

*Q. In your home, do you have a home phone line (also sometimes called a fixed line phone connected that is use to make and received personal calls), provided by companies such as Eircom, UPC, Imagine, Sky, Vodafone or Digiweb?*



	Region				Age		
	Dublin (288)	Total Urban (642)	Total Urban (Excl. Dublin) (354)	Total Rural (396)	15-34 (379)	35-54 (379)	55+ (280)
Yes	60%	56%	53%	50%	39%	54%	74%
No	40%	44%	47%	50%	61%	46%	26%

**NOTE:** In the Consumer FVCT survey, 62% had a fixed line connection, however, that was based on a sample of telecommunications decision makers aged 18+, while this is based on mobile phone users aged 15+

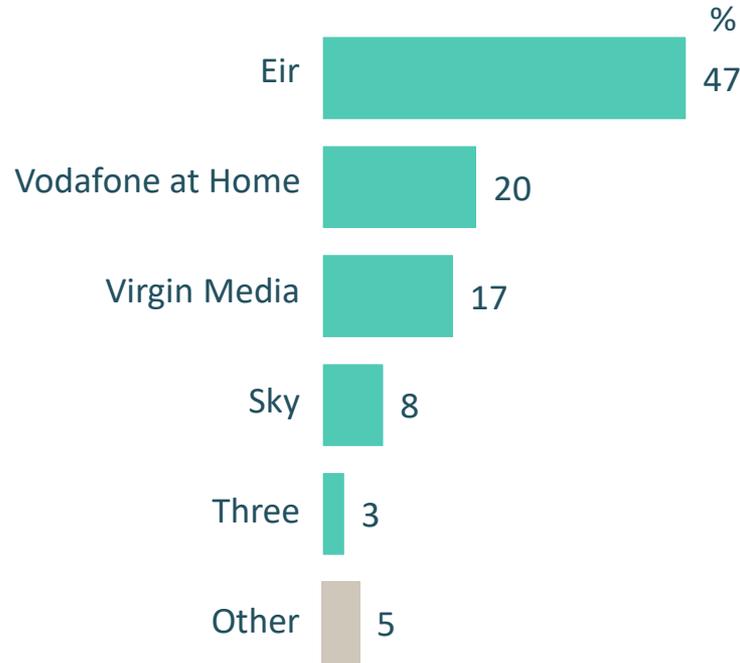
54% of those surveyed own a fixed line at home. Fixed line ownership is highest amongst those aged 55+ (74%) according to this survey.



# What Company Supplies Your Fixed Line Home Voice Service

(Base: All Owners Of Home Phone Line - 560)

Q. Which company provides your home phone line service?



Region			
Dublin (173)	Total Urban (360)	Total Urban (Excl. Dublin) (187)	Total Rural (200)
35%	43%	50%	56%
7%	15%	23%	28%
41%	26%	13%	1%
7%	9%	11%	5%
1%	1%	1%	5%
10%	5%	2%	5%

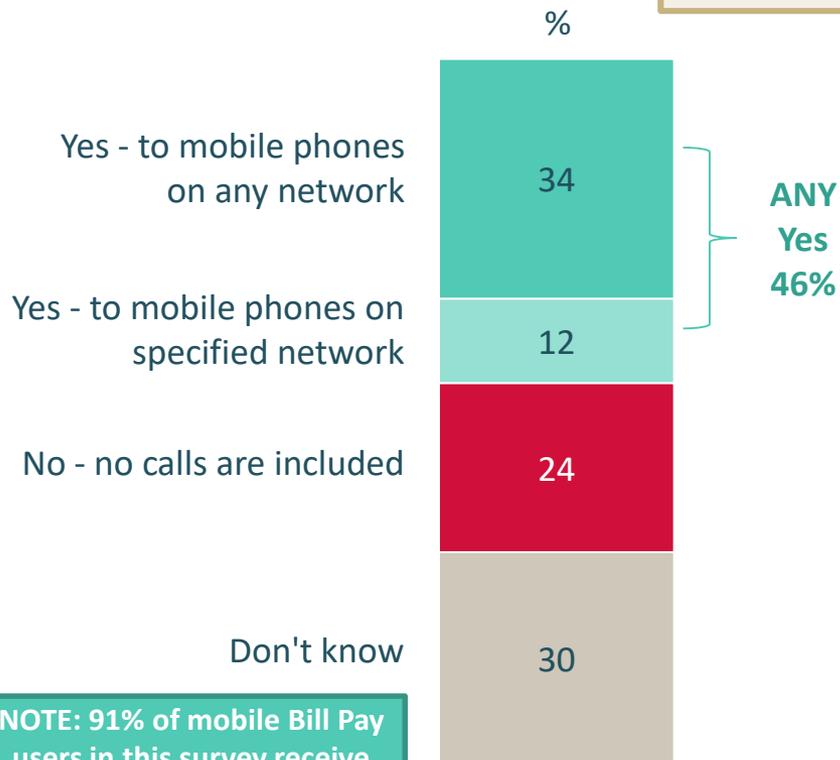
Of survey respondents purchasing fixed voice service use eir as their service provider, rising to 56% in rural areas.



# Does Your Home Phone Include Inclusive Minutes To Mobile Numbers At No Extra Cost

(Base: All Owners Of Home Phone Line, 560)

Q. Does your home phone line plan/package include a set number of minutes that can be used to make calls to mobiles at no extra cost?



NOTE: 91% of mobile Bill Pay users in this survey receive inclusive minutes as part of their Bill Pay price plan (Ref: Slide 37)

	Current Mobile Phone Provider		
	eir (265)	Vodafone at Home (113)	Virgin (96)
Yes - to mobile phones on any network	31%	38%	34%
Yes - to mobile phones on specified network	8%	19%	13%
No - no calls are included	30%	20%	14%
<b>ANY YES</b>	<b>40%</b>	<b>57%</b>	<b>47%</b>
Don't know	31%	23%	39%

NOTE: Other Providers not shown due to small base sizes

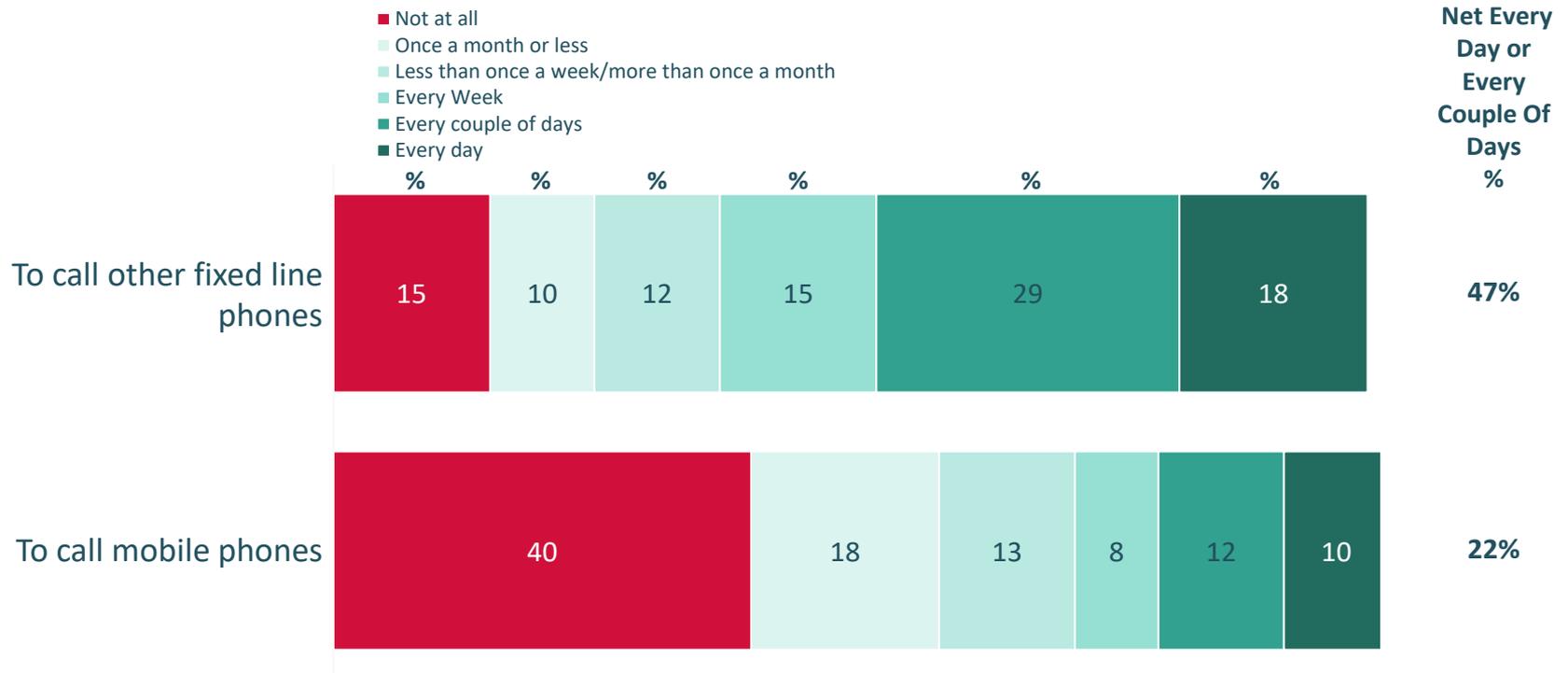
46% of home phone owners surveyed have inclusive minutes as part of their landline service.



# Frequency Of Using Fixed Line - I

(Base: All Owners Of Home Phone Line, 560)

*Q. Please indicate how frequently you use your home phone line for the following purposes.*



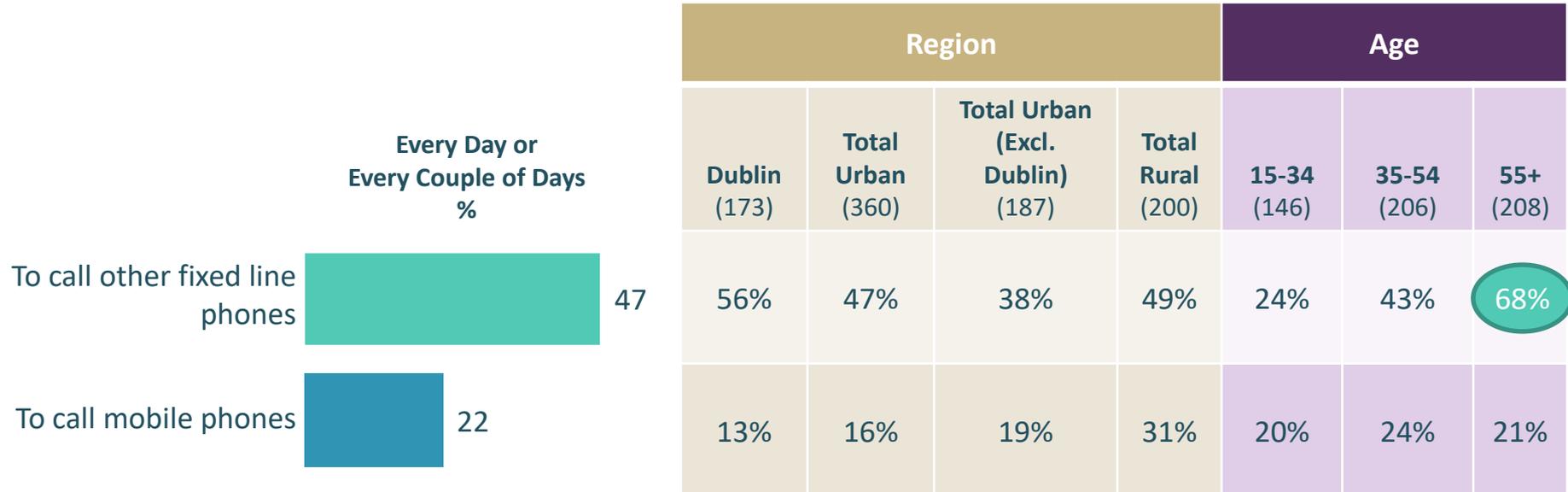
**40% of those in the survey using a fixed line phone do not call mobiles from their landline.**



# Frequency Of Using Fixed Line - II

(Base: All Owners Of Home Phone Line, 560)

Q. Please indicate how frequently you use your home phone line for the following purposes.



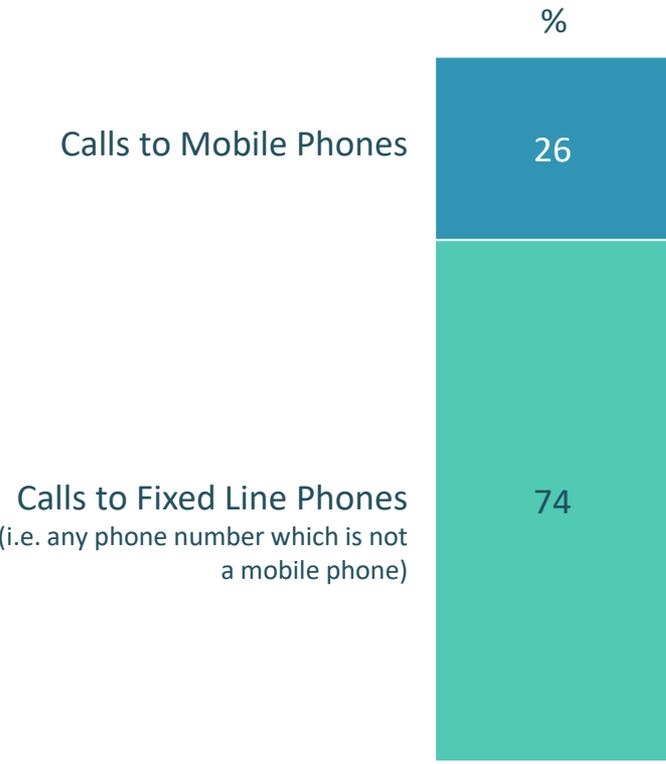
Almost Half (47%) of those with a fixed line service in this survey use it to call other fixed lines every day or every couple of days.



# Fixed Line Calls: Proportion Of Calls Per Month Made To Mobile And Fixed Lines

(Base: All Owners Of Home Phone Line, 560)

*Q. Thinking about the calls you make from your home phone line in a typical month, could you state the proportion of calls which are to mobile phones and which are to fixed line phones?*



	Region				Age		
	Dublin (173)	Total Urban (360)	Total Urban (Excl. Dublin) (187)	Total Rural (200)	15-34 (146)	35-54 (206)	55+ (208)
Calls to Mobile Phones	18%	23%	28%	34%	33%	31%	20%
Calls to Fixed Line Phones	82%	77%	72%	66%	67%	69%	80%

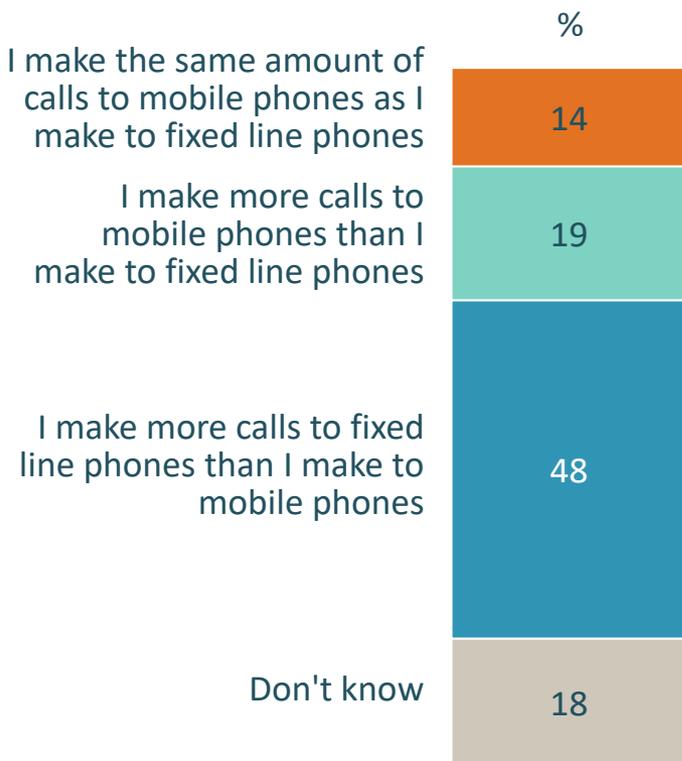
On average, 74% of calls made from fixed lines are to other fixed lines, the remaining 26% of calls are to mobile phones according to home phone owners surveyed.



# Making And Receiving Calls - Fixed Line

(Base: All Owners Of Home Phone Line, 560)

Q. Thinking about the calls you make from your home phone line in a typical month, which of the following most accurately describes your usage?



	Region				Age		
	Dublin (173)	Total Urban (360)	Total Urban (Excl. Dublin) (187)	Total Rural (200)	15-34 (146)	35-54 (206)	55+ (208)
I make the same amount of calls to mobile phones as I make to fixed line phones	17%	16%	16%	11%	20%	15%	10%
I make more calls to mobile phones than I make to fixed line phones	14%	15%	16%	27%	23%	19%	17%
I make more calls to fixed line phones than I make to mobile phones	56%	51%	47%	42%	28%	49%	61%
Don't know	13%	17%	22%	20%	29%	17%	12%

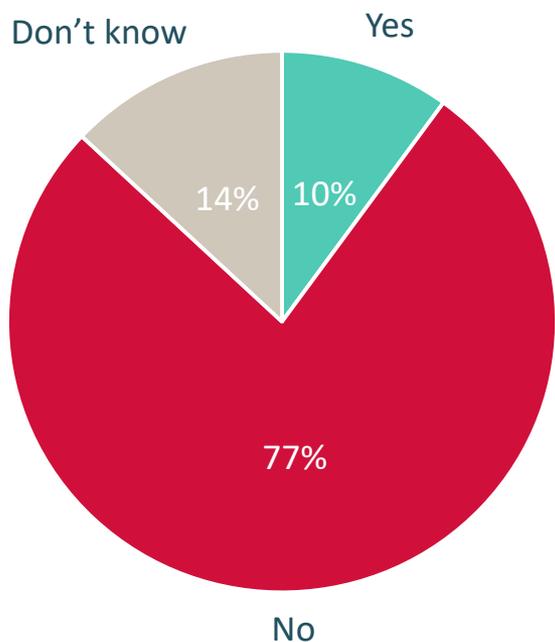
**48% of survey respondents with a home phone say that they make more calls to fixed line phones than to mobile phones from their landline, while 14% say that they make approximately the same amount of calls to landlines as they do to mobiles.**



# Have You Noticed Any Change In Cost Of Calls To Mobile From Fixed Line?

(Base: All Owners Of Home Phone Line, 560)

*Q. Thinking of your use of your fixed line home phone over the last 12 months, have you noticed any changes in the cost of making calls to mobile phones?*



	Region				Age		
	Dublin (173)	Total Urban (360)	Total Urban (Excl. Dublin) (187)	Total Rural (200)	15-34 (146)	35-54 (206)	55+ (208)
Yes	12%	10%	9%	8%	7%	9%	11%
No	72%	76%	78%	79%	73%	79%	78%
Don't know	15%	14%	13%	13%	20%	12%	10%

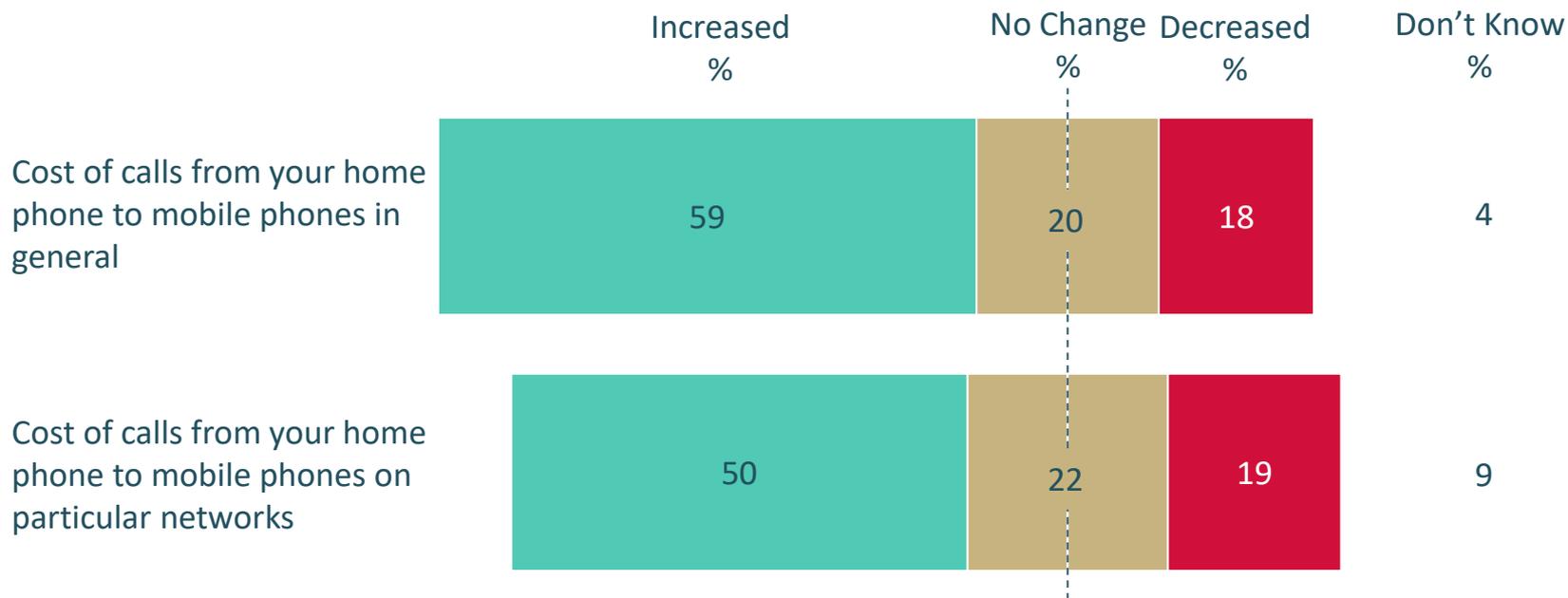
**77% of home phone owners in the survey have not noticed any change in the cost of making calls to mobile from fixed lines, however, 10% say they have noticed a difference.**



# Noticed Change In Cost Of Calls To Mobile From Fixed Line

(Base: All Owners Of Home Phone Line Noticing Change In Cost Of Calls To Mobile From Fixed Line - 54)

Q. Have you noticed the cost of any of the following changing?



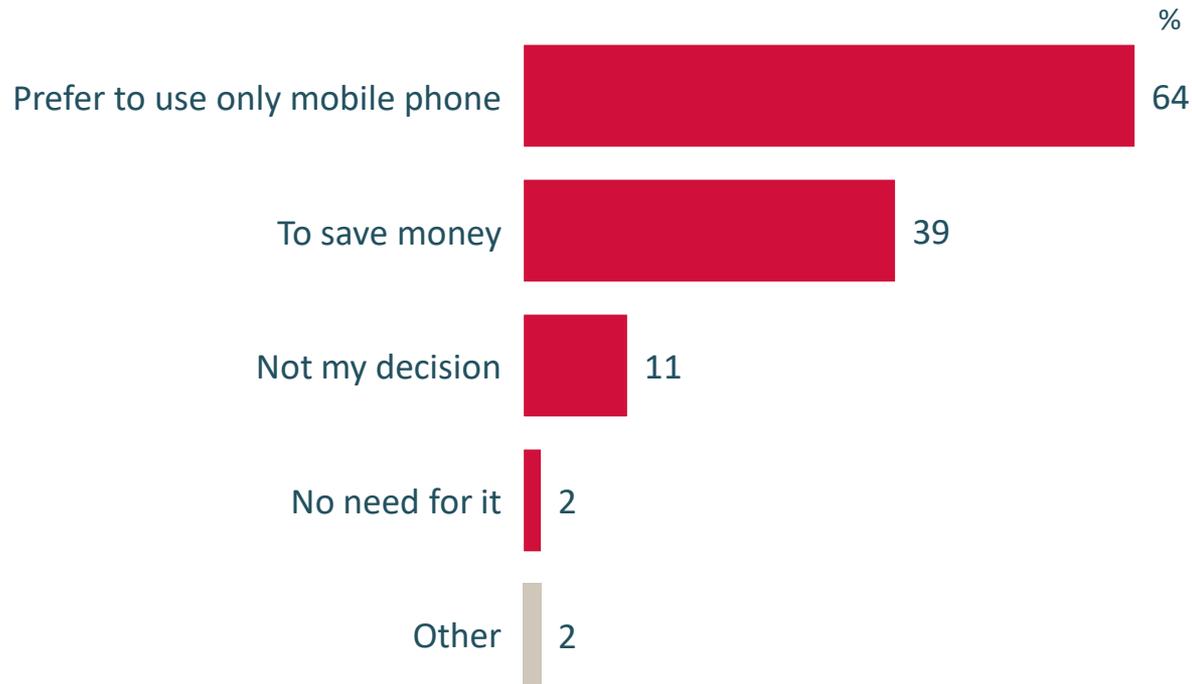
Amongst home phone owners in the survey noticing a change in cost of calls from landline to mobile, 59% say the cost of calling mobiles in general has increased, while 50% claim that the increase only applies to calls on particular mobile networks.



# Reason For Not Having Home Phone

(Base: All Without Home Phone - 478)

Q. Why don't you have a home phone line?



The most commonly cited reason for not owning a fixed line telephone amongst those in the survey without a home phone, is the preference to use mobile instead (64%), while 39% say that it is to save money.

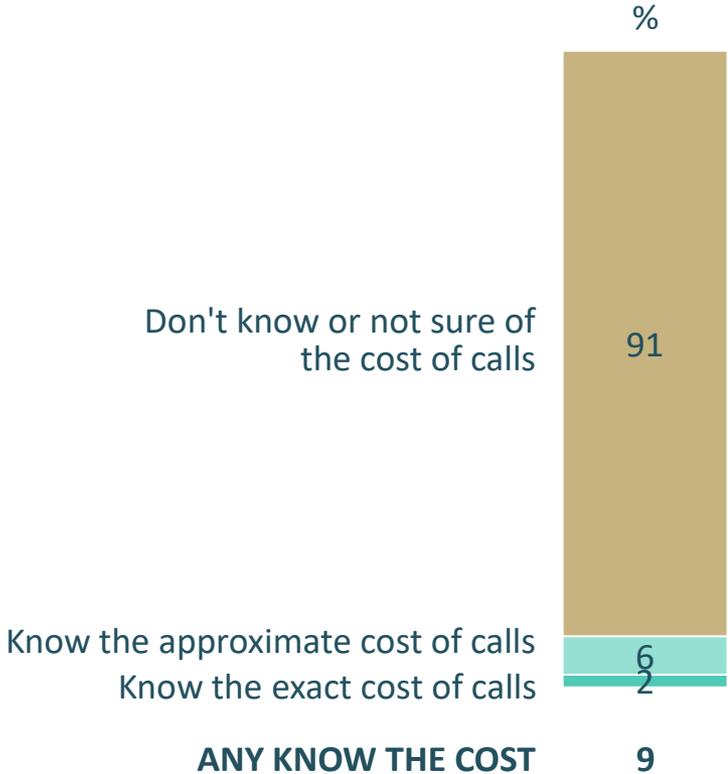


# Cost of Different Call Types

# Awareness Of Cost Of Making Calls From Mobile Phone - Bill Pay

(Base: All Users Of Bill Pay - 419)

Q. Thinking again about your mobile phone, could you state whether you know the cost of making calls/cost of making calls as part of your bundle package?



	Age		
	15-34 (127)	35-54 (184)	55+ (107)
Don't know or not sure of the cost of calls	86%	91%	96%
Know the approximate cost of calls	10%	6%	3%
Know the exact cost of calls	4%	3%	1%
<b>ANY KNOW THE COST</b>	<b>14%</b>	<b>9%</b>	<b>4%</b>

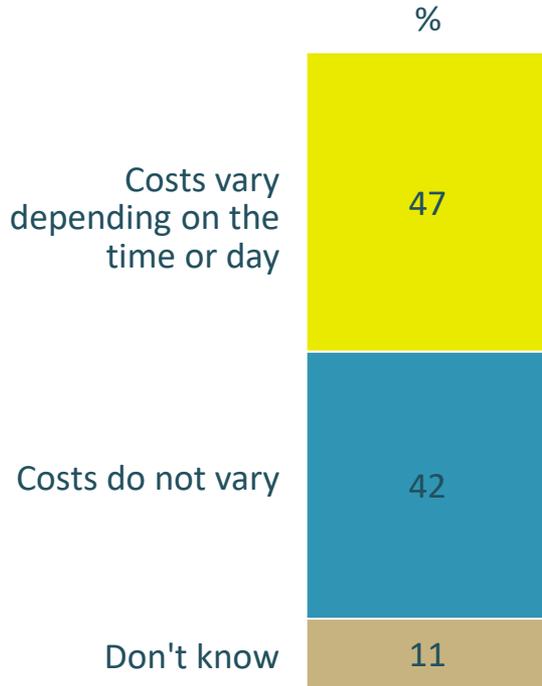
91% of mobile Bill Pay users surveyed do not know or are not sure of the cost of making calls/cost of making calls as part of their bundle package.



## Does Cost of Calls From Mobile Phone Vary Depending on Time/Day - Bill Pay

(Base: All Bill Pay Users Knowing Cost Of Making Calls, 37\*)

Q. Do the costs of making calls on your plan/package vary according to when calls are made (daytime, evening, weekend)?



\*Caution: Small Base Size

**47% of Bill Pay customers surveyed that know how much calls cost on their plan, say that call costs on their Bill Pay mobile phone vary depending on the time or day.**

## Average Cost Of Calls For Mobile Bill Pay Users (Outside Of Inclusive Minutes)

(Base: All Bill Pay Users Knowing Cost Of Making Calls, 37\*)

Q. Thinking about the cost of making calls on your plan/package after any set amount of inclusive minutes/texts have been used, what the costs are for the following?

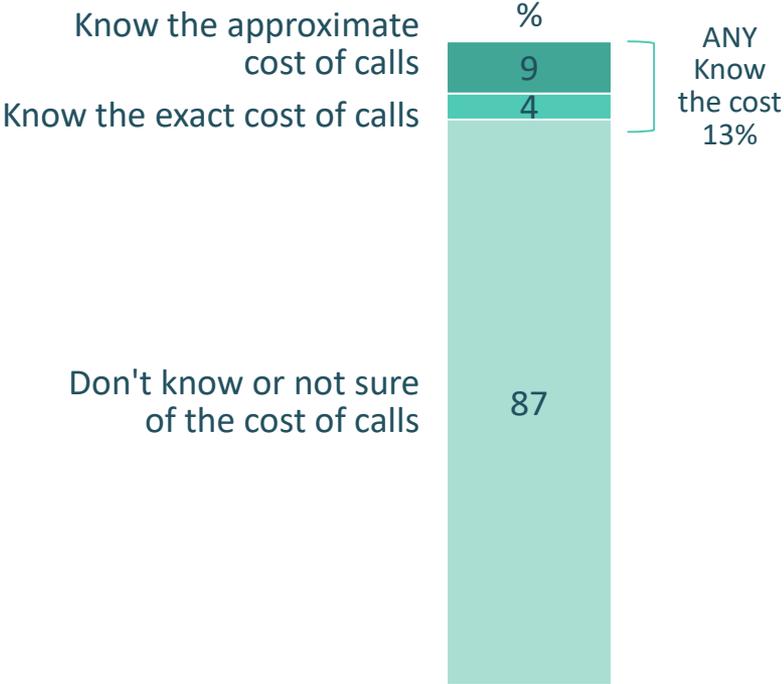
Cost of calls to mobiles on different mobile network to you	17cent per minute
Cost of calls to fixed line phones	15cent per minute
Cost of calls to mobiles on the same mobile network as you	13cent per minute

**According to Bill Pay users surveyed that are aware of call costs on their Bill Pay plan outside of their inclusive minutes, the average cost per minute for calling a different mobile network is 17c, while the p/m cost for calling fixed lines is 15c and calls to those on the same mobile network is cheapest at 13c p/m on average.**

# Awareness Of Cost Of Individual Calls – Prepay Users

(Base: All Prepay Users - 619)

*Q. Before asking about the costs of different types of call, could you state whether you know the costs for calls/ cost of making calls as part of your bundle package?*



	Age		
	15-34 (252)	35-54 (195)	55+ (173)
Know the approximate cost of calls	12%	9%	4%
Know the exact cost of calls	3%	7%	3%
<b>ANY KNOW THE COST</b>	<b>15%</b>	<b>17%</b>	<b>7%</b>
Don't know or not sure of the cost of calls	85%	83%	93%

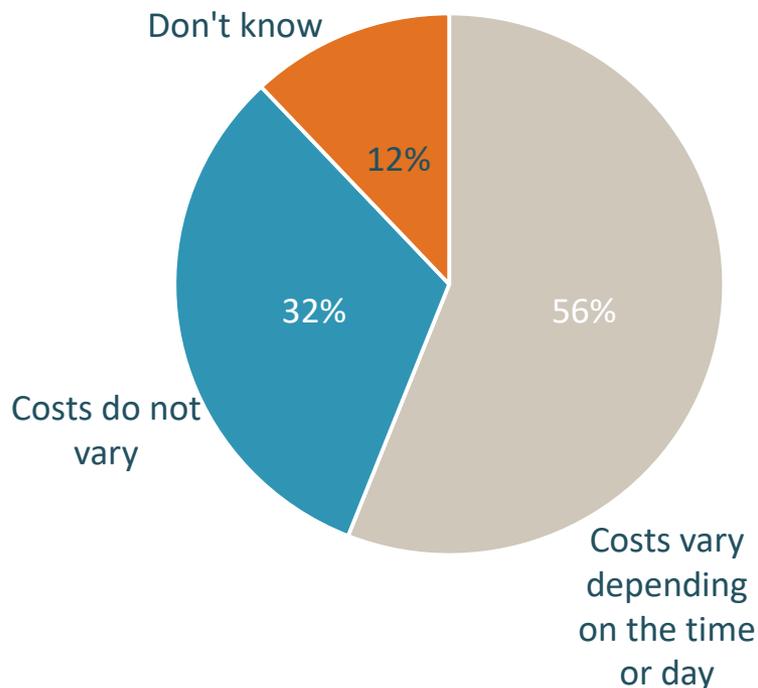
There is little awareness of the cost of individual calls among Prepay mobile phone users surveyed; 87% don't know the per minute rate for calls outside their allocated quota.



## Do Call Costs From Mobile Vary Due To Time/Day - Prepay

(Base: All Prepay Users Knowing Cost Of Making Calls - 80)

*Q. Do the costs of making calls or texts on your Prepay phone vary according to when calls are made (daytime, evening, weekend) or do the costs remain the same irrespective of when calls are made?*



**56% of survey respondents on Prepay who know cost of making calls say that the costs do not vary depending on the time or day.**

## Estimated Cost Of Calls For Mobile Prepay Users (Outside Of Inclusive Minutes)

(Base: All Prepay Users Knowing Cost Of Making Calls - 80)

*Q. Thinking about the cost of making calls on your Prepay phone after any inclusive minutes have been used, do you know what the costs are for the following?*

Cost Of Calls To Fixed Line Phones	17cent per minute
Cost Of Calls To Mobiles On Different Mobile Network To You	17cent per minute
Cost Of Calls To Mobiles On The Same Mobile Network As You	8cent per minute

**According to those aware of how much calls cost on their Prepay mobile (outside of inclusive minutes) in this survey, the average cost for calling a fixed line is 17c p/m. Calls to other mobile networks are also charged at 17c p/m on average, while calls to those on the same network are estimated at 8c per minute.**



# Awareness of Network Called and Cost

# Awareness Of Network Calling When Making Call From Mobile Phone

(Base: All Mobile Users - 1038)

Q. When you are calling from your mobile phone, to what extent are you aware of which mobile network you are calling?



	Region				Age		
	Dublin (288)	Total Urban (642)	Total Urban (Excl. Dublin) (354)	Total Rural (396)	15-34 (379)	35-54 (379)	55+ (280)
Never aware	48%	43%	39%	53%	39%	43%	60%
Occasionally aware	12%	20%	26%	24%	25%	21%	17%
Aware half the time	18%	16%	14%	7%	14%	13%	10%
Often aware	15%	13%	11%	9%	14%	13%	8%
Always aware	7%	8%	9%	8%	8%	10%	5%

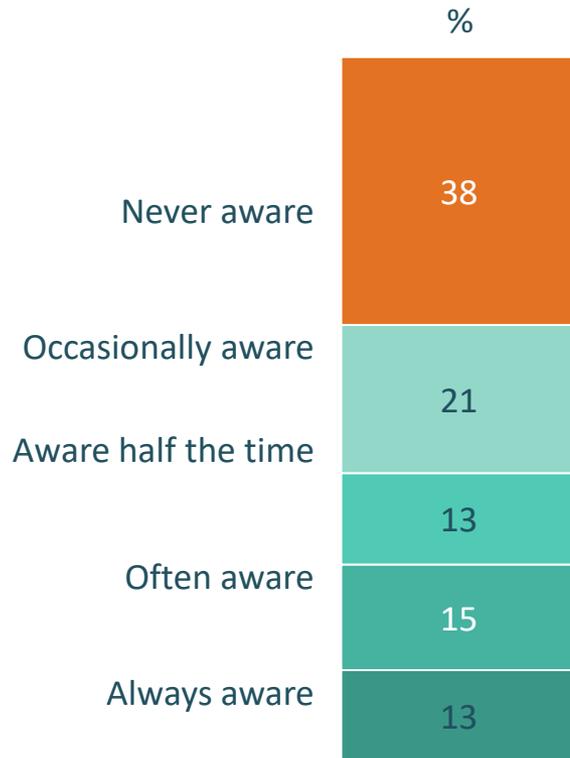
46% of the total survey sample state that they are never aware of the network they are calling, with only 8% claiming that they are always aware.



# Awareness Of Network Calling To For Your Most Frequently Called Mobile Numbers (From Your Mobile Phone)

(Base: All Mobile Users - 1038)

Q. When you are calling your most frequently called mobile numbers from your mobile phone, to what extent are you aware of which mobile network(s) you are calling?



	Region				Age		
	Dublin (288)	Total Urban (642)	Total Urban (Excl. Dublin) (354)	Total Rural (396)	15-34 (379)	35-54 (379)	55+ (280)
Never aware	45%	38%	32%	39%	30%	35%	53%
Occasionally aware	9%	17%	23%	28%	25%	19%	19%
Aware half the time	20%	15%	11%	9%	14%	13%	11%
Often aware	17%	17%	17%	10%	16%	17%	9%
Always aware	8%	13%	16%	14%	14%	16%	8%

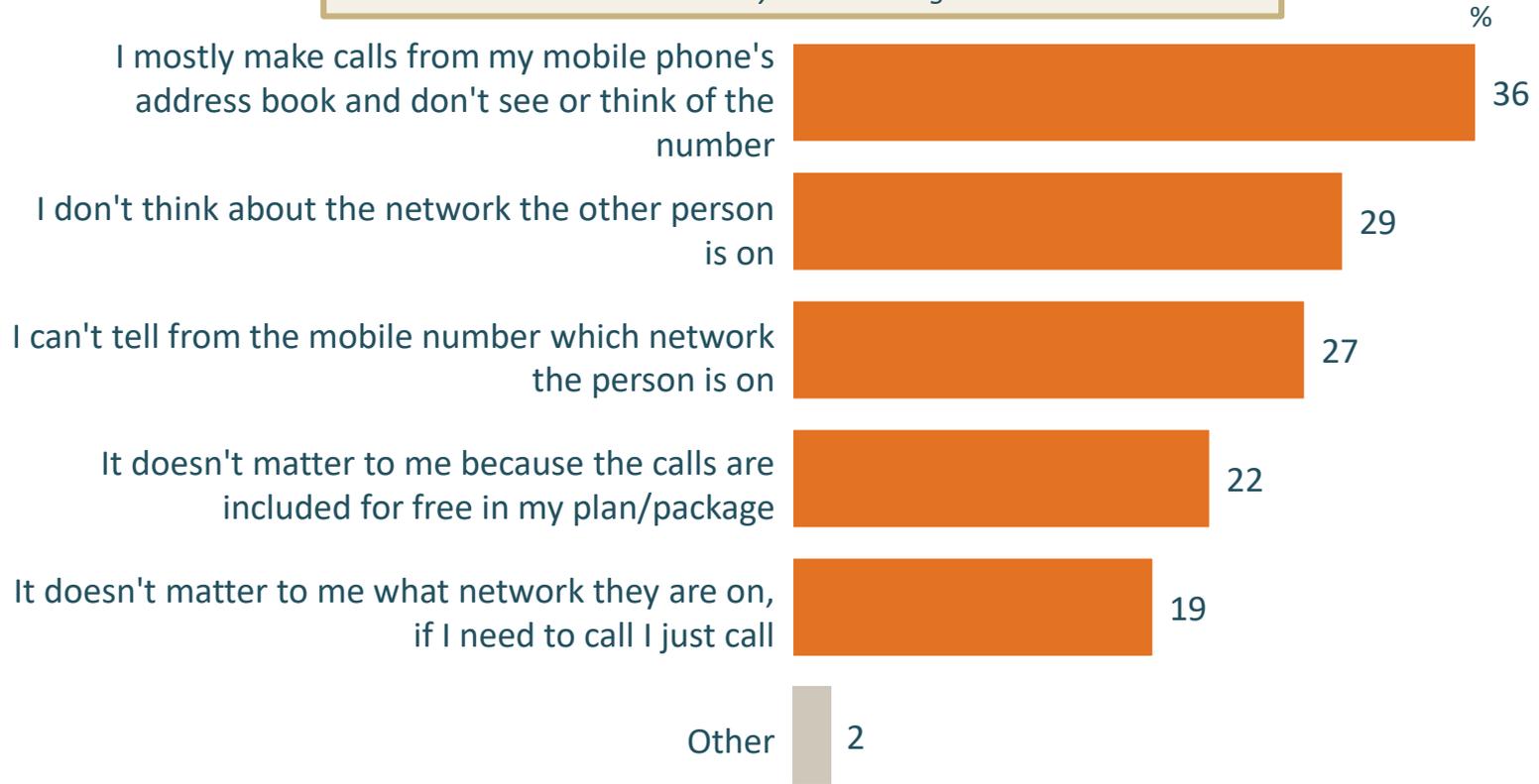
In terms of frequently dialled numbers, 38% of the total sample in this survey are never aware of what network they are calling.



# Reason For Not Knowing Network Being Called - Mobile

(Base: All Not Aware Of Network Being Called - 962)

Q. Could you explain why you are not always aware of the mobile network you are calling?



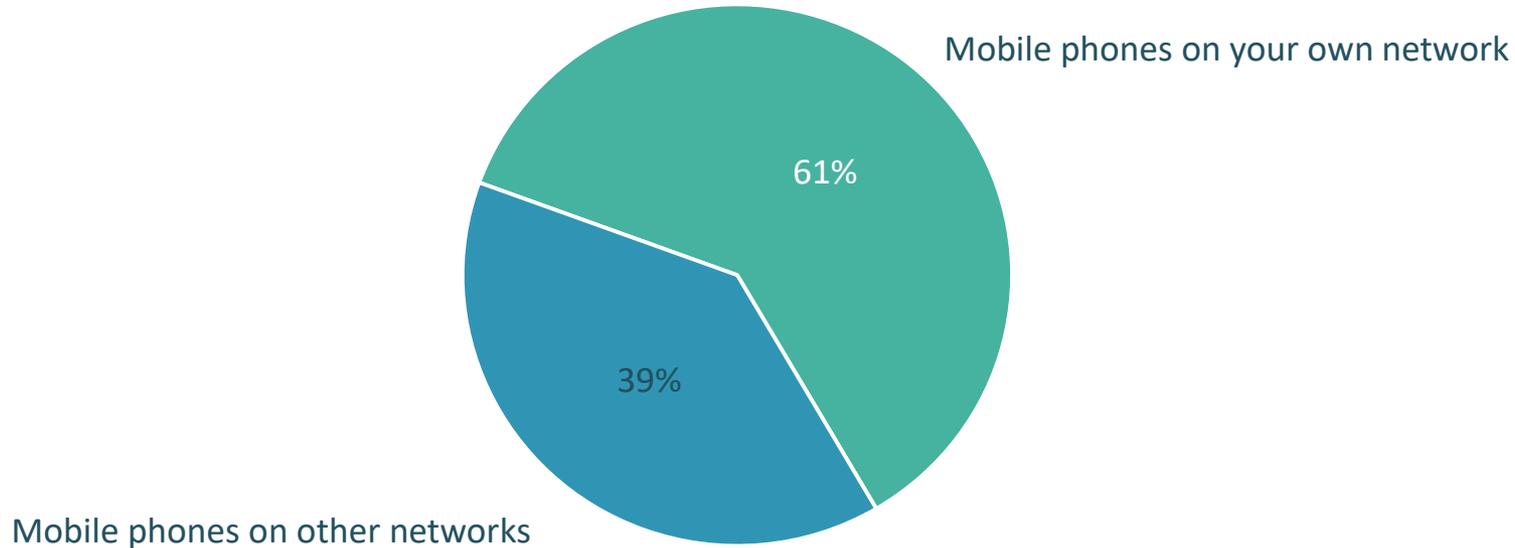
The main reasons for not knowing what network is being called, according to those in the survey are numbers being saved to the mobile's address book (36%), not thinking about what network they are calling (29%) and being unable to tell the network from the prefix (27%).



# Proportion Of All Mobile Calls Made From Your Mobile Phone To Same/Different Network Per Month

(Base: All Aware Of Calling Network - 661)

*Q. Thinking about the calls you make from your mobile phone to other mobile phones in a typical month, could you estimate the proportion that are to mobile phones on your network and the proportion that are to mobile phones other networks (use percentages)?*



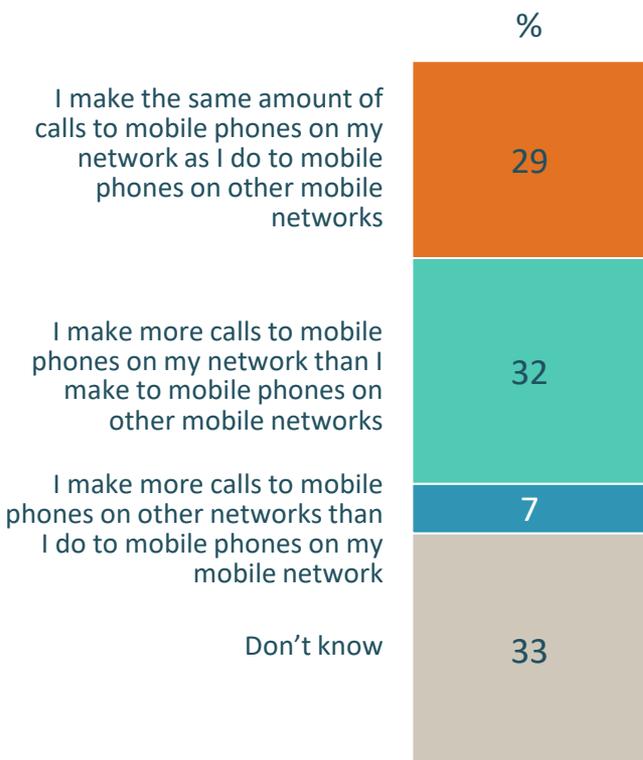
**Amongst those in the survey with at least some awareness of what networks they call, the majority (61%) of calls are made to numbers on the same network as the caller.**



# Description of Usage of Mobile Phone (Call Types) – All Mobile Users

(Base: All Mobile Users - 1038)

Q. Thinking about the calls you make from your mobile phone to other mobile phones in a typical month, which of the following most accurately describes your usage?



Region				Age		
Dublin (288)	Total Urban (642)	Total Urban (Excl. Dublin) (354)	Total Rural (369)	15-34 (379)	35-54 (379)	55+ (280)
26%	27%	28%	31%	35%	27%	23%
34%	30%	27%	36%	33%	36%	26%
2%	6%	9%	8%	6%	8%	6%
39%	37%	35%	25%	26%	30%	46%

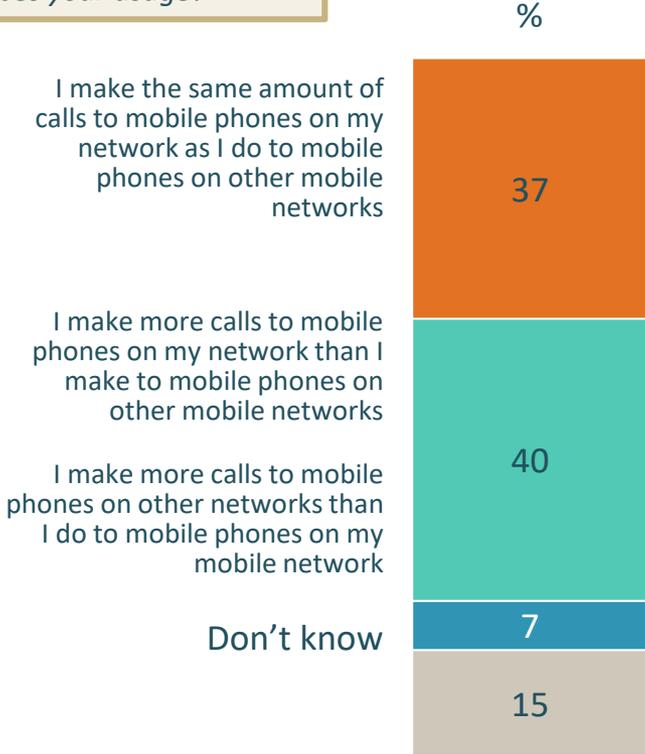
In terms of making and receiving calls, 29% of all respondents in this survey say that they make and receive roughly the same amount of calls using their mobile. 32% state that they receive more calls than they make, while only 7% feel that they make more calls than they receive.



# Description of Usage of Mobile Phone (Call Types) – All Aware of the Network They are Calling

(Base: All Aware of Network Being Called - 555)

*Q. Thinking about the calls you make from your mobile phone to other mobile phones in a typical month, which of the following most accurately describes your usage?*



**Amongst mobile users in this survey that are aware of what network they are calling, 40% say that they make more calls to mobiles on their own network than they do to mobiles on other networks.**



# How To Tell If Number Called Is On Another Network

(Base: All Mobile Users - 1038)

Q. Are there any ways that you can tell if the number you are calling is on another mobile network?



Age		
15-34 (379)	35-54 (379)	55+ (280)
34%	35%	42%
29%	31%	21%
21%	18%	17%
15%	12%	9%
4%	6%	3%
1%	1%	1%
7%	6%	10%

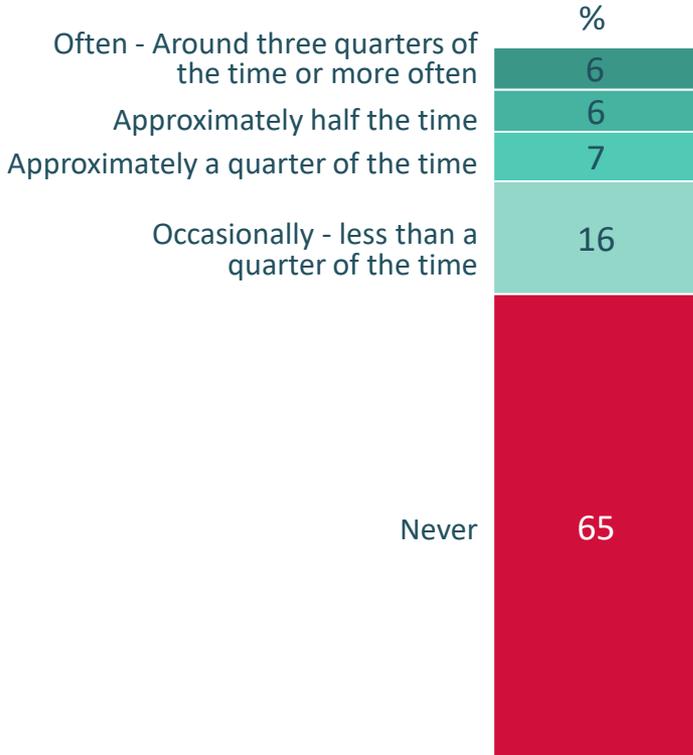
Over a third (37%) of all taking the survey believe that there is no way of knowing what network you are calling.



# Cost Consideration of Mobile to Mobile Calls

(Base: All Mobile Users - 1038)

Q. When making a call from your mobile to another mobile network, how often do you think about the cost of the call?



	Region				Age		
	Dublin (288)	Total Urban (642)	Total Urban (Excl. Dublin) (354)	Total Rural (396)	15-34 (379)	35-54 (379)	55+ (280)
Often - Around three quarters of the time or more	10%	7%	6%	5%	7%	7%	5%
Approximately half the time	13%	8%	4%	2%	7%	6%	4%
Approximately a quarter of the time	13%	8%	3%	6%	8%	7%	6%
Occasionally - less than a quarter of the time	8%	12%	15%	23%	20%	14%	13%
Never	56%	65%	73%	64%	58%	66%	71%

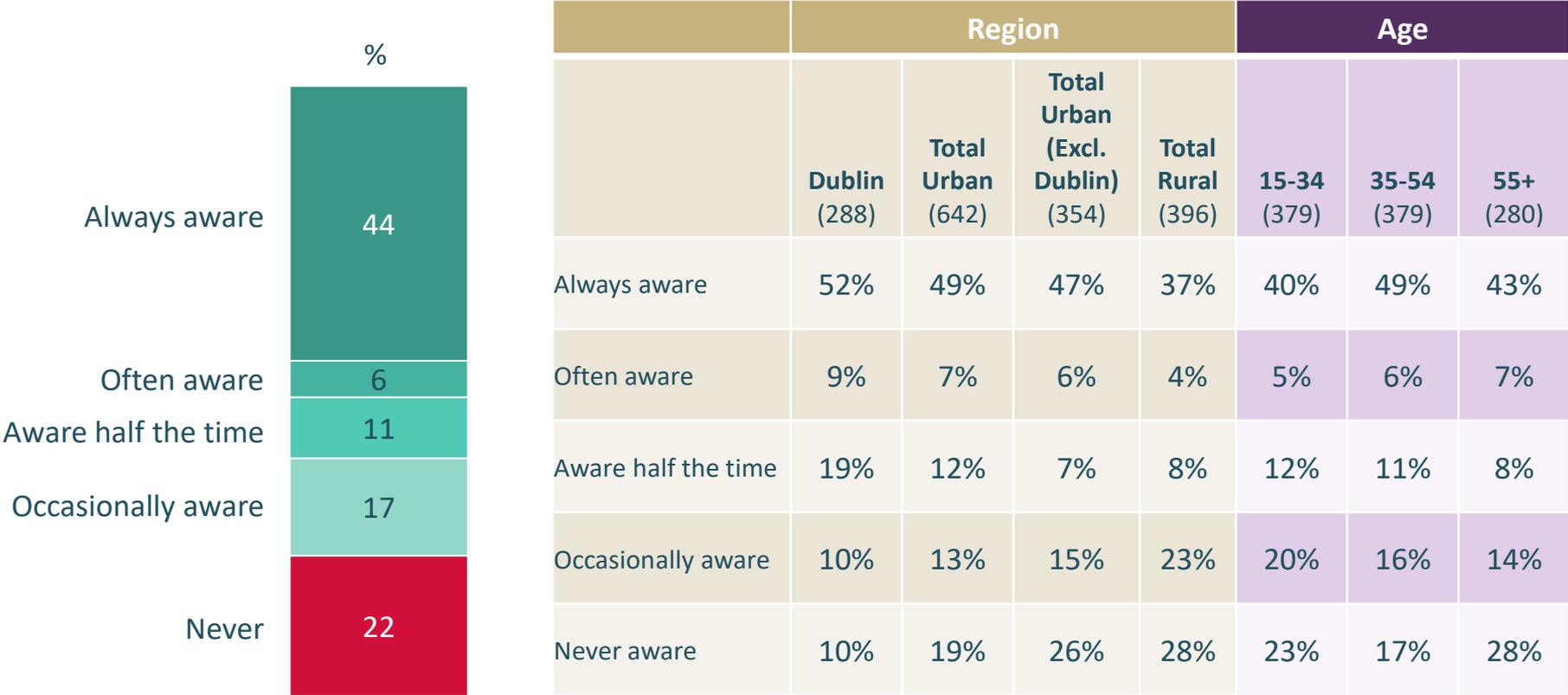
65% of those taking the survey never consider the cost of mobile to mobile calls. Older users in the sample are less likely to consider cost, with 71% of those aged 55 and over saying that they never think about it.



# Awareness of Calling Fixed Line Number (From Mobile)

(Base: All Mobile Users - 1038)

Q. When you are calling from your mobile phone, to what extent are you aware whether the number you are calling is a fixed line phone?



Awareness of calling a fixed line is much higher, with 44% of the sample saying that they always know if they are calling a fixed line. However, 22% still say that they are never aware.



# Awareness of Calling Fixed Line Number (From Mobile) Amongst Mobile Users that Own a Home Phone Line

(Base: All Owners Of Home Phone Line - 560)

Q. When you are calling from your mobile phone, to what extent are you aware whether the number you are calling is a fixed line phone?



	Region				Age		
	Dublin (173)	Total Urban (360)	Total Urban (Excl. Dublin) (187)	Total Rural (200)	15-34 (146)	35-54 (206)	55+ (208)
Always aware	52%	51%	50%	38%	45%	50%	44%
Often aware	9%	9%	9%	4%	6%	8%	7%
Aware half the time	18%	12%	6%	10%	14%	12%	9%
Occasionally aware	10%	11%	11%	19%	15%	15%	12%
Never aware	11%	17%	23%	29%	19%	15%	29%

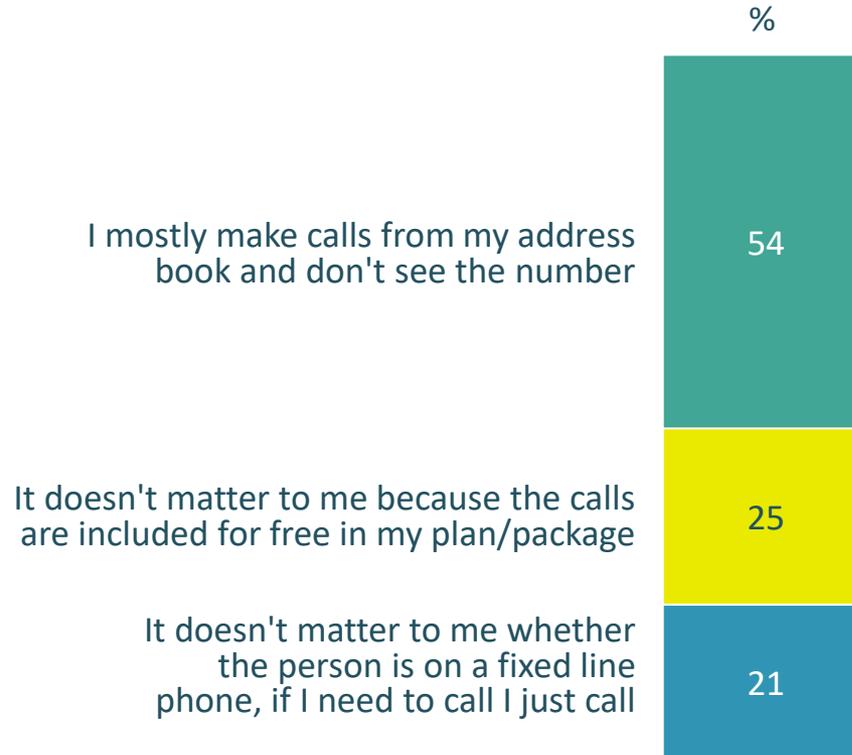
Amongst Survey respondents that have both a mobile and a fixed line telephone, 47% are always aware whether the number they are calling from their mobile phone is a fixed line phone.



# Reason For Not Being Aware If Number Being Called Is Fixed Line

(Base: All Not Aware Of Calling Fixed Line - 577)

Q. Why are you not always aware?



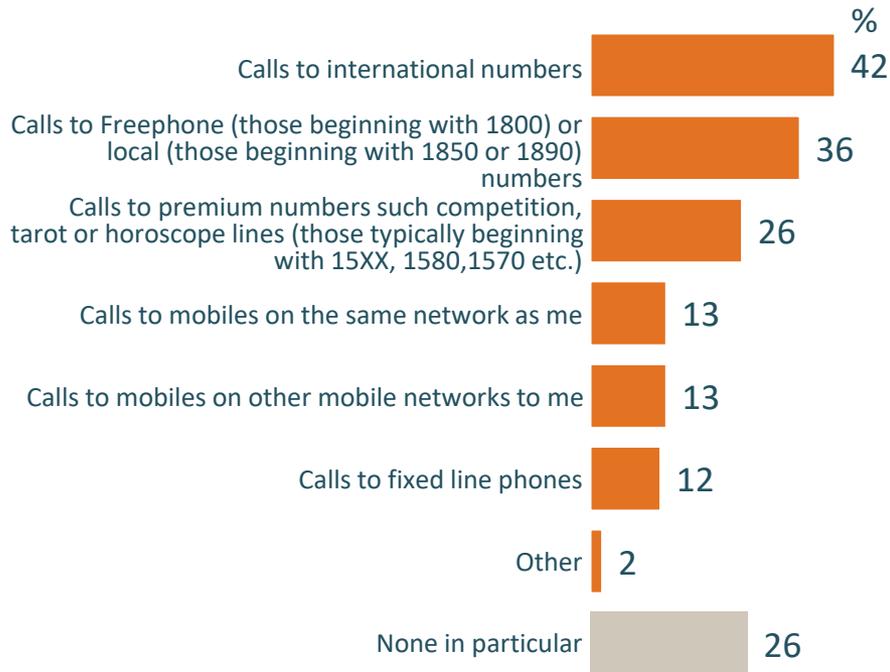
According to this survey, using an address book is often the reason for not being aware if the number being called is a fixed line – 54%, of those in the survey that are not aware of calling fixed line, claiming this to be the reason.

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# Concern Over Cost Of Certain Types Of Calls From Mobile

(Base: All Mobile Users - 1038)

Q. Are there any particular types of phone calls that you are concerned about when considering the cost of a call from your mobile phone?



Region				Age		
Dublin (288)	Total Urban (642)	Total Urban (Excl. Dublin) (354)	Total Rural (396)	15-34 (379)	35-54 (379)	55+ (280)
49%	43%	37%	42%	44%	39%	44%
32%	35%	38%	38%	36%	38%	35%
14%	24%	31%	30%	28%	27%	23%
12%	11%	10%	17%	16%	12%	12%
20%	15%	11%	10%	16%	12%	10%
13%	13%	13%	12%	16%	10%	11%
1%	3%	5%	0	2%	3%	1%
24%	26%	28%	26%	23%	26%	30%

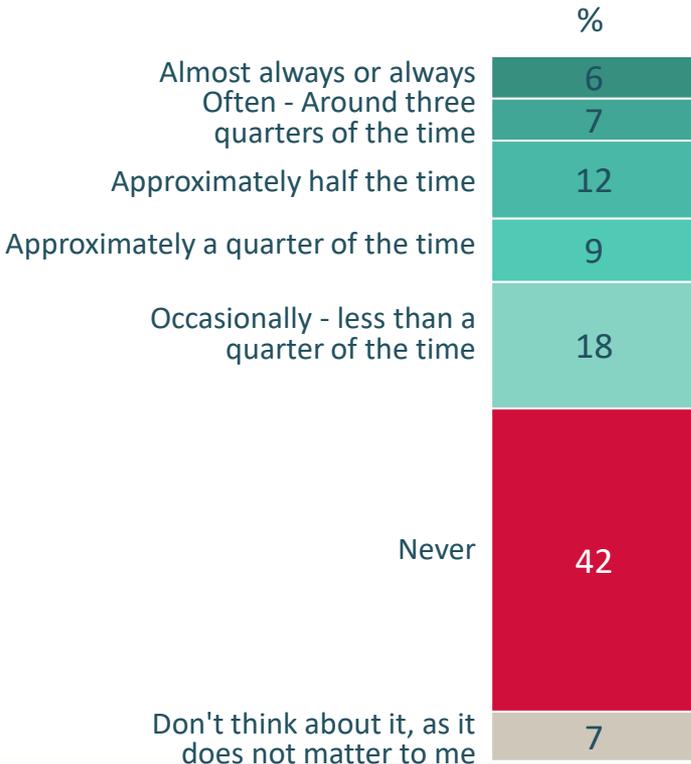
International calls cause the greatest concern amongst those taking the survey (42%) in terms cost, rising to 49% amongst Dublin residents. '18-Numbers' are also a concern for 36% despite being Freephone/local numbers.



# Awareness Of Network When Receiving Calls On Mobile

(Base: All Mobile Users - 1038)

Q. If someone is calling you on your mobile, to what extent do you know what mobile network they are calling from?



	Region				Age		
	Dublin (288)	Total Urban (642)	Total Urban (Excl. Dublin) (354)	Total Rural (396)	15-34 (379)	35-54 (379)	55+ (280)
Almost always or always	4%	6%	7%	6%	6%	9%	3%
Often - Around three quarters of the time	13%	9%	7%	2%	8%	6%	5%
Approximately half the time	19%	14%	9%	8%	14%	12%	8%
Approximately a quarter of the time	7%	7%	8%	10%	9%	9%	8%
Occasionally - less than a quarter of the time	6%	14%	21%	25%	20%	18%	17%
Never	44%	41%	39%	44%	37%	40%	52%
Don't think about it, as it does not matter to me	7%	8%	9%	5%	6%	7%	7%

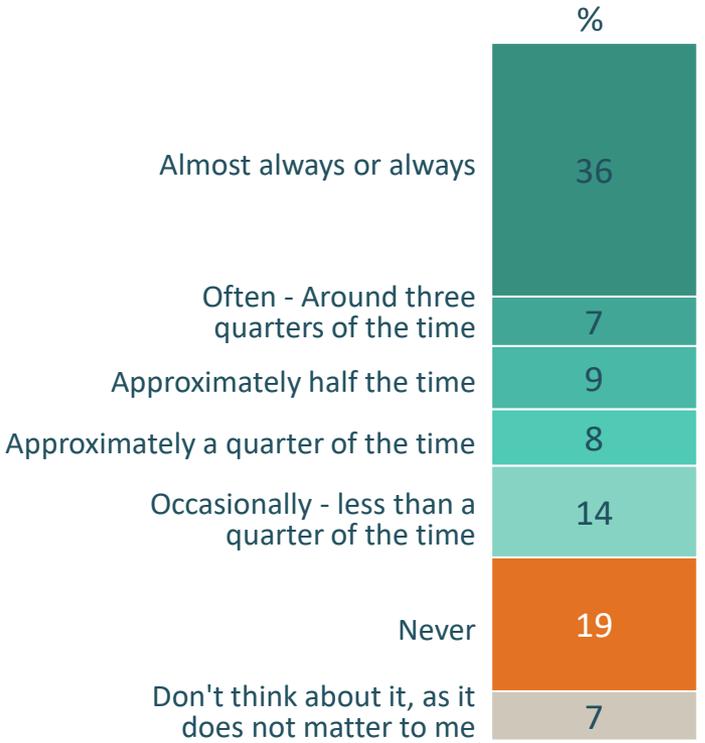
42% in this survey never know what network they receive calls from, a further 7% say that it doesn't matter to them



# Awareness Of Fixed Line/Mobile When Receiving Calls On Mobile

(Base: All Mobile Users - 1038)

*Q. If someone is calling you on your mobile, to what extent would you know if they are calling from a fixed line network or a mobile network?*



	Region				Age		
	Dublin (288)	Total Urban (642)	Total Urban (Excl. Dublin) (354)	Total Rural (396)	15-34 (379)	35-54 (379)	55+ (280)
Almost always or always	47%	41%	37%	27%	36%	41%	30%
Often - Around three quarters of the time	12%	9%	6%	5%	7%	7%	8%
Approximately half the time	17%	11%	6%	6%	12%	8%	7%
Approximately a quarter of the time	6%	6%	5%	11%	7%	8%	9%
Occasionally - less than a quarter of the time	3%	9%	14%	21%	17%	12%	11%
Never	6%	16%	23%	23%	15%	16%	27%
Don't think about it, as it does not matter to me	7%	8%	8%	6%	6%	7%	8%

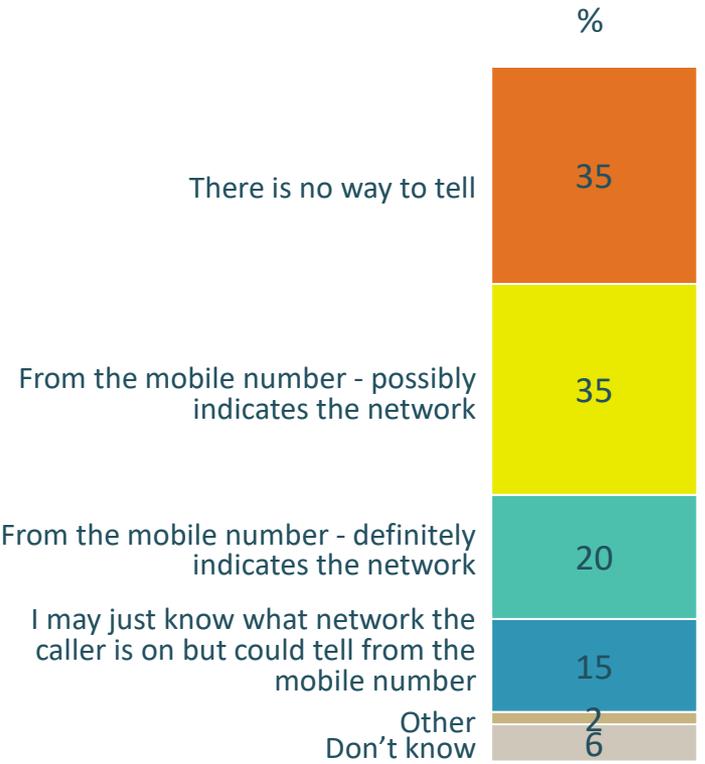
**Over 1 in 3 (36%) in this survey are always or almost always aware when receiving a call if it is from a landline or from a mobile.**



# Awareness of Ways Of Knowing Network Person Is Calling You On

(Base: All Mobile Users - 1038)

Q. Are there any ways that you can tell what mobile network the person calling you is on?



	Region				Age		
	Dublin (288)	Total Urban (642)	Total Urban (Excl. Dublin) (354)	Total Rural (396)	15-34 (379)	35-54 (379)	55+ (280)
There is no way to tell	39%	35%	31%	34%	33%	32%	41%
From the mobile number - possibly indicates the network	34%	36%	37%	33%	36%	37%	29%
From the mobile number - definitely indicates the network	24%	19%	14%	22%	23%	19%	17%
I may just know what network the caller is on but could tell from the mobile number	10%	16%	20%	13%	14%	16%	12%
Other	4%	2%	1%	0%	1%	1%	2%
Don't know	4%	5%	6%	7%	4%	6%	7%

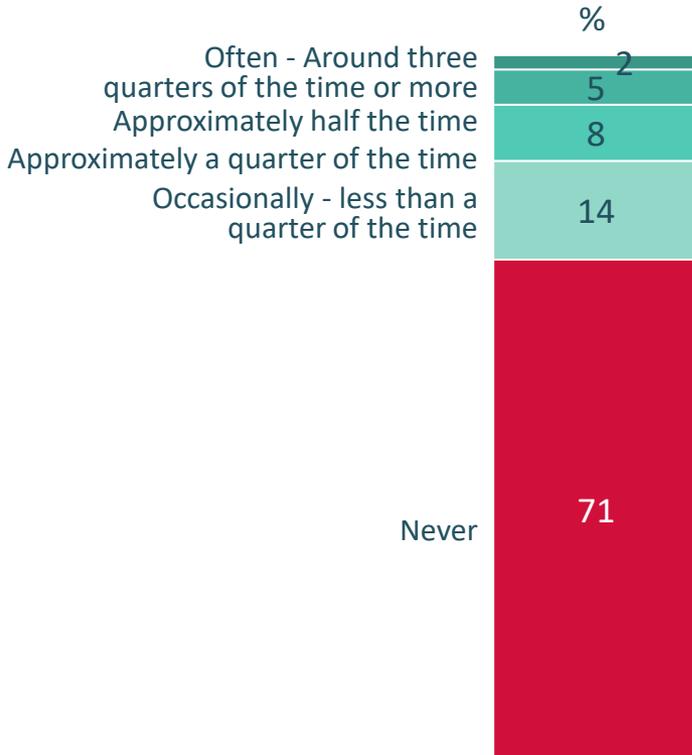
More than a third (35%) of the survey sample claim that there is no way to tell what network a call is coming from when receiving a call. 34% feel that the mobile number will possibly indicate the network it is on, while 1 in 5 (20%) are convinced that you can definitely tell the network by the number.



# Consideration Of Cost To Calling Party When Receiving Call

(Base: All Mobile Users - 1038)

Q. When you see an incoming call on your mobile, do you consider what the call will cost the person calling?



	Region				Age		
	Dublin (288)	Total Urban (642)	Total Urban (Excl. Dublin) (354)	Total Rural (396)	15-34 (379)	35-54 (379)	55+ (280)
Often - Around three quarters of the time or more	3%	2%	1%	2%	2%	3%	0%
Approximately half the time	11%	8%	5%	1%	7%	4%	4%
Approximately a quarter of the time	14%	8%	4%	7%	7%	10%	6%
Occasionally - less than a quarter of the time	7%	10%	13%	22%	19%	13%	10%
Never	65%	72%	78%	68%	65%	70%	79%

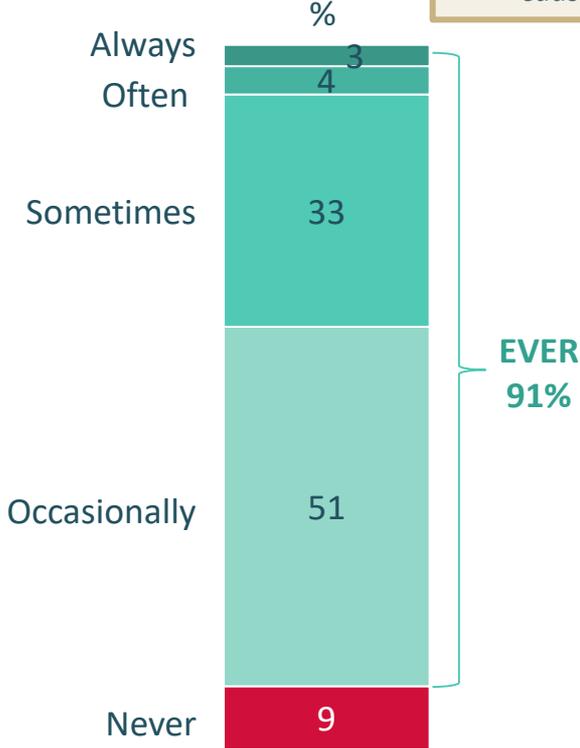
7 in 10 (71%) of all in the survey never consider the cost incurred by the caller when receiving a call.



# Incidence of Changing Behaviour Due To Considering Cost To Person Calling

(Base: All Considering Cost Of Person Calling - 305)

*Q. You mentioned that you consider what it costs people on other networks to call you. Does this ever cause you change how you treat their calls?*



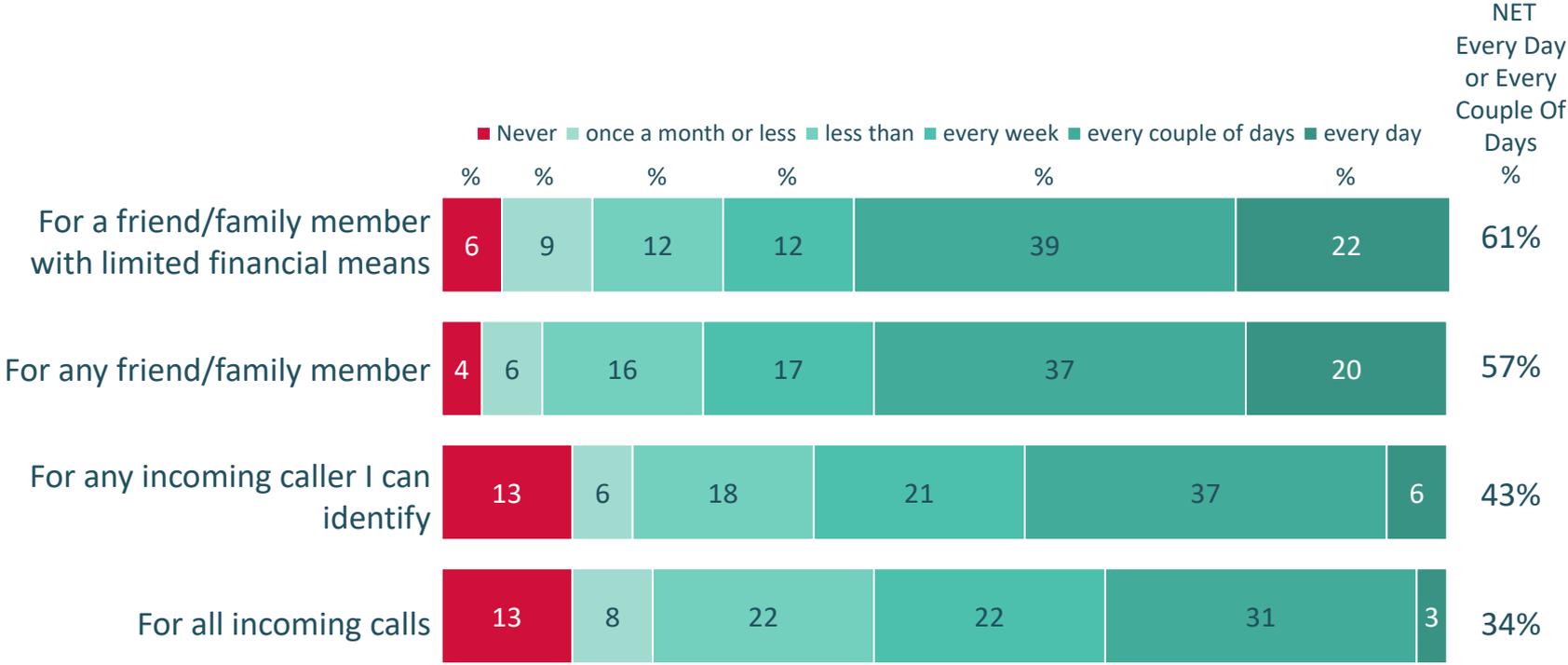
Of those in the survey considering the cost incurred by the caller when receiving a call, 91% change their behaviour at least occasionally as a result of this consideration.



# Circumstances When You Would Change Behaviour When Receiving Calls

(Base: All Change Behaviour Due To Considering Cost Of Person Calling, 305)

Q. How often would you change how you treat these calls in each of the following circumstances?



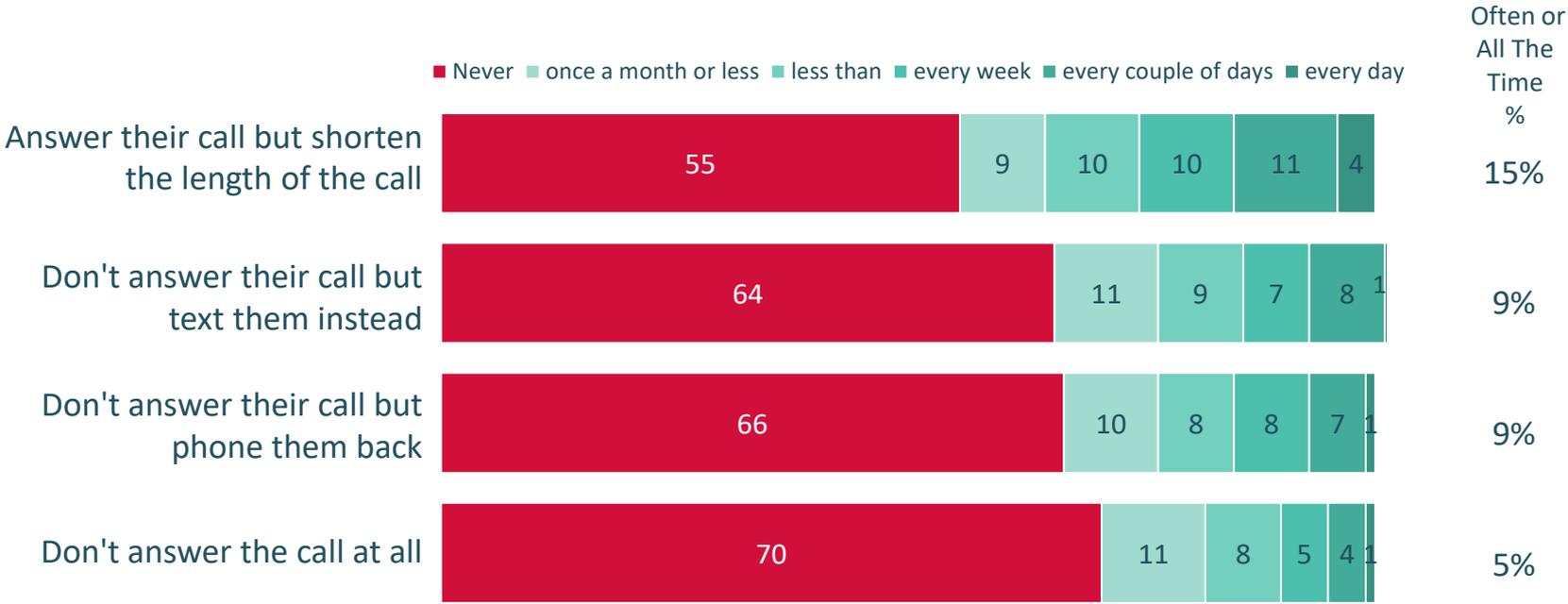
Amongst those in the survey with a propensity to change their behaviour as a result of considering the cost incurred by the calling party, 60% say that this regularly occurs when receiving a call from a friend/family member with low financial means.



# Actions Taken When Receiving Calls From Other Networks

(Base: All Considering Cost of Person Calling - 772)

*Q. When you are aware that the caller is on another network, do you take any of the following actions?*



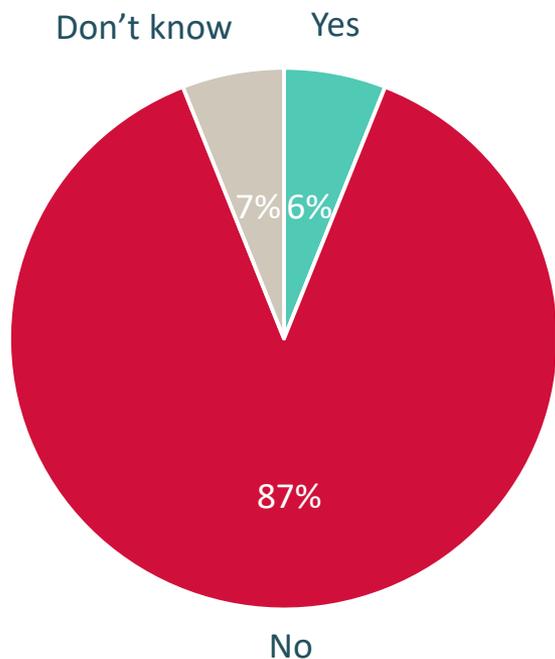
According to those in this survey that consider the cost incurred by the person calling, the most common workaround is answering the call but shortening the duration of it (15% often or all the time).



# Noticed Change In Cost Of Making Calls From Mobile

(Base: All Mobile Users – 1,038)

Q. Thinking of your use of your mobile over the last 12 months, have you noticed any changes in the cost of making calls?



	Region				Age		
	Dublin (288)	Total Urban (642)	Total Urban (Excl. Dublin) (354)	Total Rural (396)	15-34 (379)	35-54 (379)	55+ (280)
Yes	8%	7%	7%	3%	5%	7%	6%
No	84%	85%	86%	91%	87%	87%	88%
Don't know	8%	7%	7%	6%	8%	6%	6%

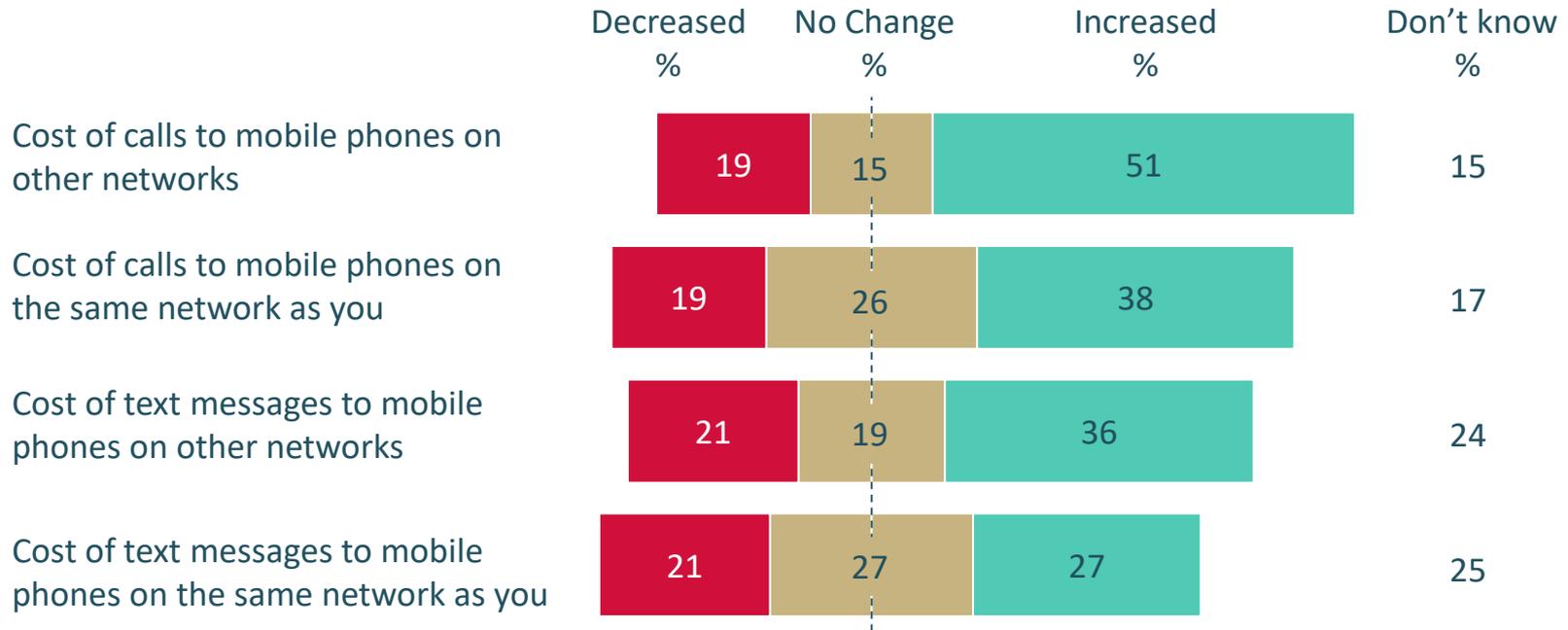
6% of all taking the survey have noticed a change in the cost of making calls from their mobile.



# Nature Of Change In Cost (Mobile)

(Base: All Noticed Changes In Cost of Making Calls from Mobile - 60)

*Q. Have you noticed the cost of any of the following changing (and indicate whether you believe the cost has increased or decreased)?*



**Out of those in the survey that believe the cost of mobile calls has changed, 51% feel that the cost of calling other networks has increased.**



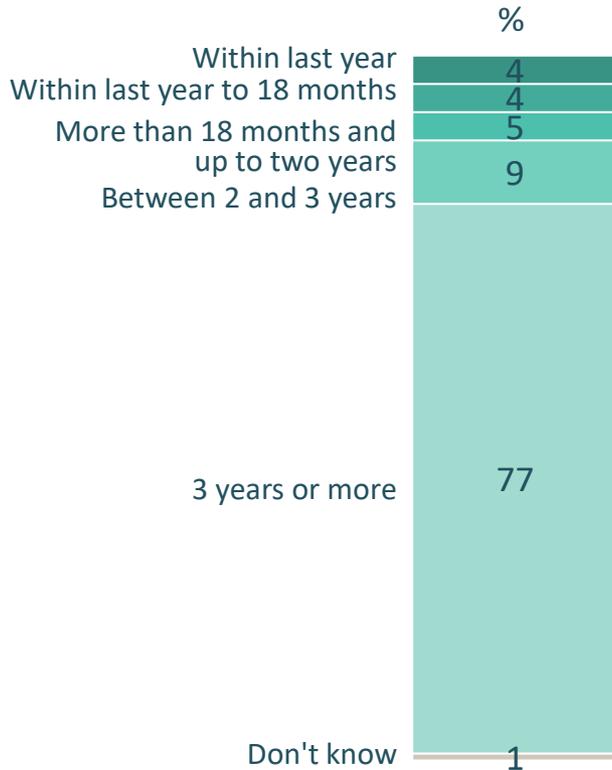


**Switching**

# Length of Time With Current Mobile Supplier? - I

(Base: All Mobile Users - 1038)

Q. How long have you been with your current operator?



	Region				Age		
	Dublin (288)	Total Urban (642)	Total Urban (Excl. Dublin) (354)	Total Rural (396)	15-34 (379)	35-54 (379)	55+ (280)
Within last year	6%	4%	3%	3%	5%	3%	4%
Within last year to 18 months	7%	6%	5%	2%	6%	3%	4%
More than 18 months and up to two years	9%	6%	3%	2%	7%	4%	2%
Between 2 and 3 years	12%	10%	8%	8%	12%	10%	5%
3 years or more	63%	73%	81%	82%	70%	78%	84%
Don't know	2%	1%	*	2%	1%	1%	2%

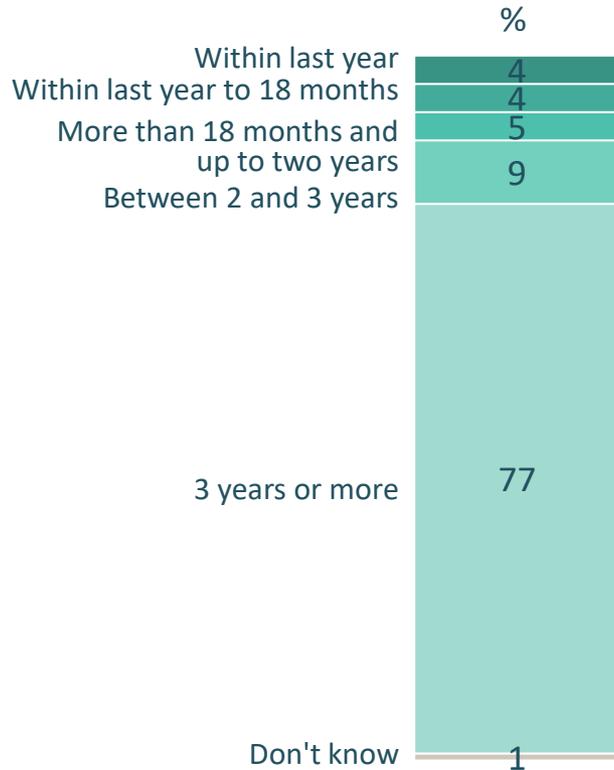
The majority (77%) of the survey sample have been a customer of their current mobile supplier for more than three years, this rises to 84% for older individuals (aged 55+)



# Length of Time With Current Mobile Supplier? -II

(Base: All Mobile Users - 1038)

Q. How long have you been with your current operator?



	Current Mobile Phone Provider				Mobile Tariff	
	Vodafone (446)	Meteor (179)	Three (283)	Tesco Mobile (67)	Prepay (619)	Bill Pay (419)
Within last year	2%	3%	5%	11%	3%	5%
Within last year to 18 months	2%	5%	3%	11%	5%	4%
More than 18 months and up to two years	4%	5%	4%	8%	5%	3%
Between 2 and 3 years	4%	10%	10%	30%	10%	8%
3 years or more	87%	76%	77%	41%	75%	80%
Don't know	1%	*	1%	0	2%	1%

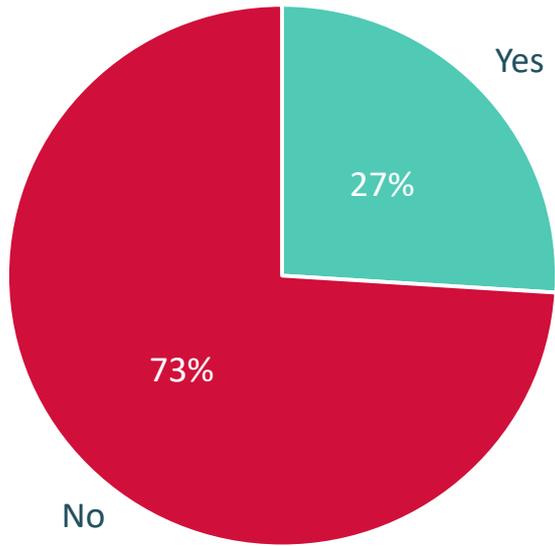
**87% of Vodafone mobile users in the survey have been a customer of Vodafone for 3 years or more**



# Ever Switched Mobile Operator

(Base: All Mobile Users – 1,038)

Q. Were you previously with another mobile phone operator?



	Region				Age		
	Dublin (288)	Total Urban (642)	Total Urban (Excl. Dublin) (354)	Total Rural (396)	15-34 (379)	35-54 (379)	55+ (280)
Yes	36%	32%	29%	19%	31%	30%	18%
No	64%	68%	71%	81%	69%	70%	82%

	Current Mobile Phone Provider				Mobile Tariff	
	Vodafone (446)	Meteor (179)	Three (283)	Tesco Mobile (67)	Prepay (619)	Bill Pay (419)
Yes	15%	29%	33%	50%	25%	31%
No	85%	71%	67%	50%	75%	69%

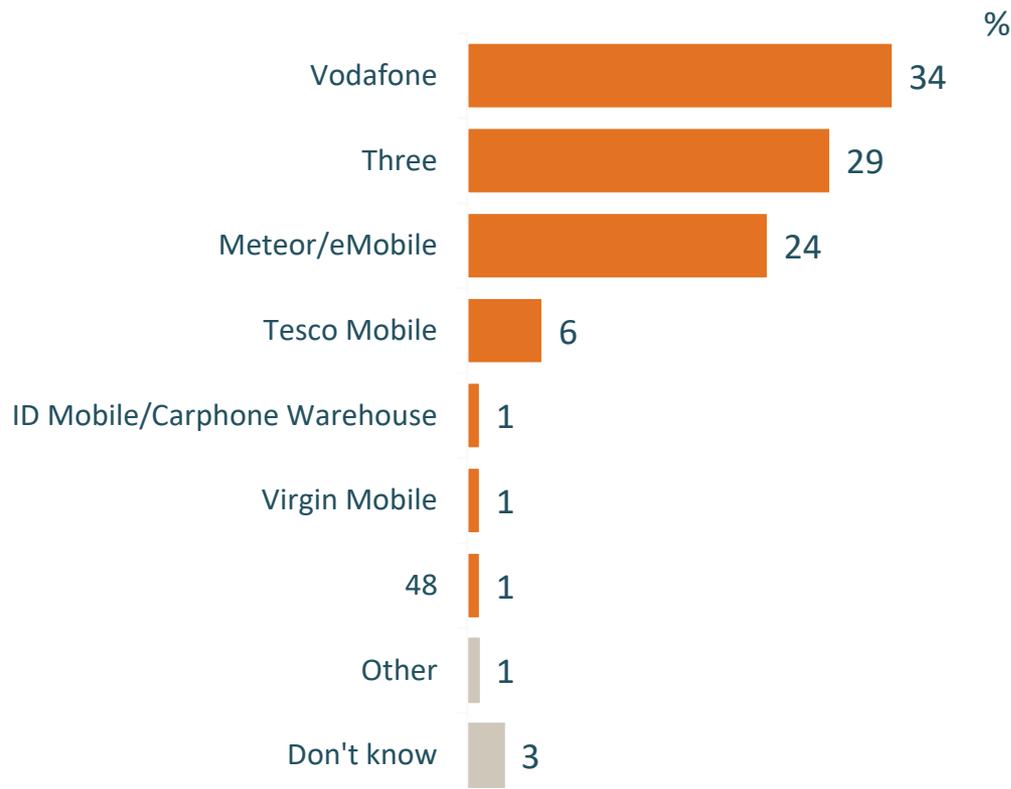
73% of all survey respondents have never switched mobile operators. Those in rural areas switched less with 82% reporting to have never switched.



# Name Of Previous Supplier - Mobile

(Base: All Changed Operator - 282)

Q. Which mobile phone operator were you previously with?



Current Mobile Phone Provider		
Vodafone (67)	Meteor (53)	Three (93)
N/A	47%	48%
49%	29%	N/A
34%	2%	27%
9%	12%	3%
2%	2%	0
0	3%	1%
0	0	2%
3%	2%	0
2%	3%	19%

NOTE: Other Providers not shown due to small base sizes

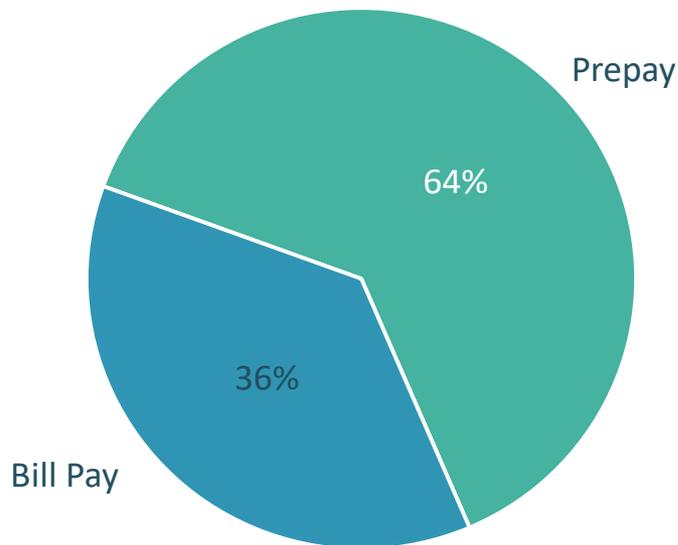
**34% of those in the survey that have switched their mobile operator in the past have previously been with Vodafone. 29% have switched from Three**



# Previous Mobile Tariff Type

(Base: All Changed Operator and know Provider - 275)

*Q. When you were with your previous operator, was your mobile plan/package, a Prepay package (where you buy credit before you can make a call) or Bill Pay package (where you have a contract with your operator and subsequently receive a bill for calls, texts or other services you used in the previous month)*



	Current Mobile Tariff	
	Prepay (153)	Bill Pay (128)
Prepay	86%	39%
Bill Pay	14%	61%

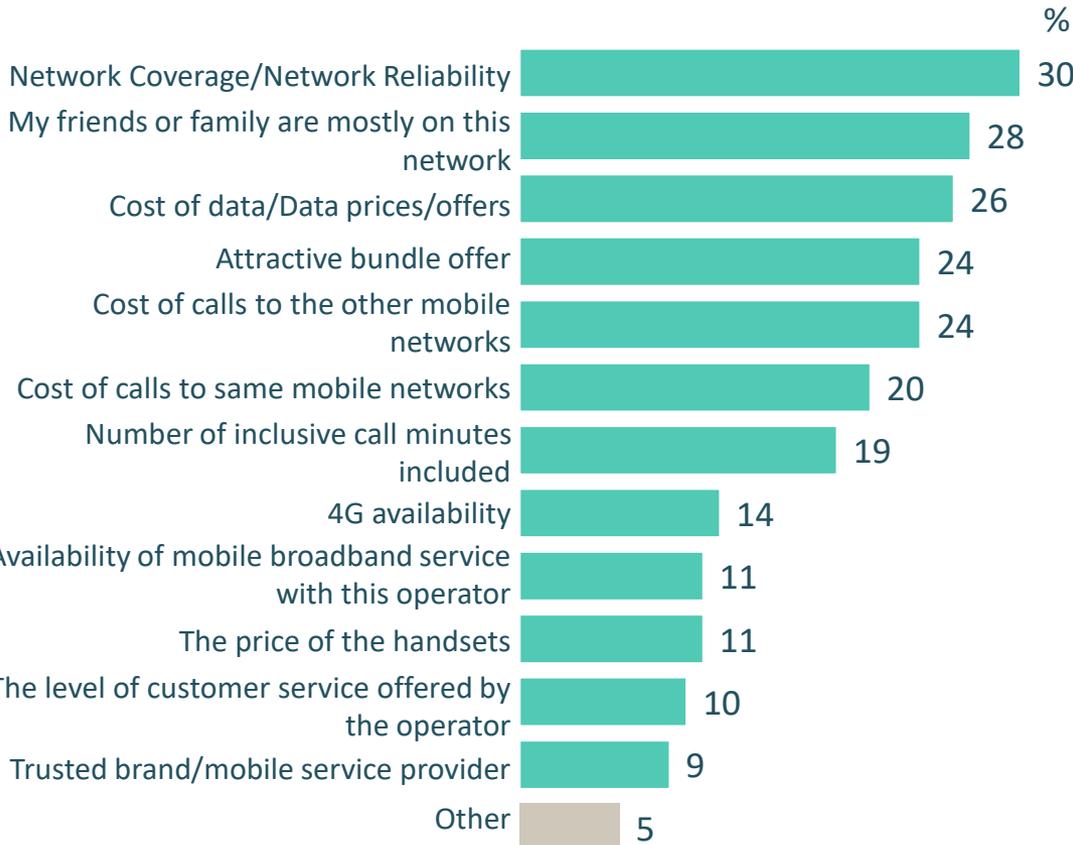
**64% of those that changed operator were on a Prepay tariff with their previous supplier according to this survey.**



# Reasons For Choosing Current Mobile Supplier

(Base: All Changed Operator - 282)

*Q. Thinking about when you chose your current mobile operator, please select the top three reasons out of the following set of possible reasons which were important to your decision to choose your mobile operator?*



Current Mobile Phone Provider			Mobile Tariff	
Vodafone (67)	Meteor (53)	Three (93)	Prepay (153)	Bill Pay (128)
42%	16%	31%	29%	32%
35%	33%	27%	38%	16%
10%	26%	37%	23%	30%
22%	14%	27%	18%	32%
19%	26%	20%	25%	22%
18%	30%	13%	18%	23%
21%	12%	22%	20%	18%
10%	15%	21%	14%	14%
10%	15%	11%	10%	11%
14%	10%	9%	8%	15%
11%	16%	2%	8%	12%
18%	4%	10%	8%	11%
1%	3%	8%	5%	6%

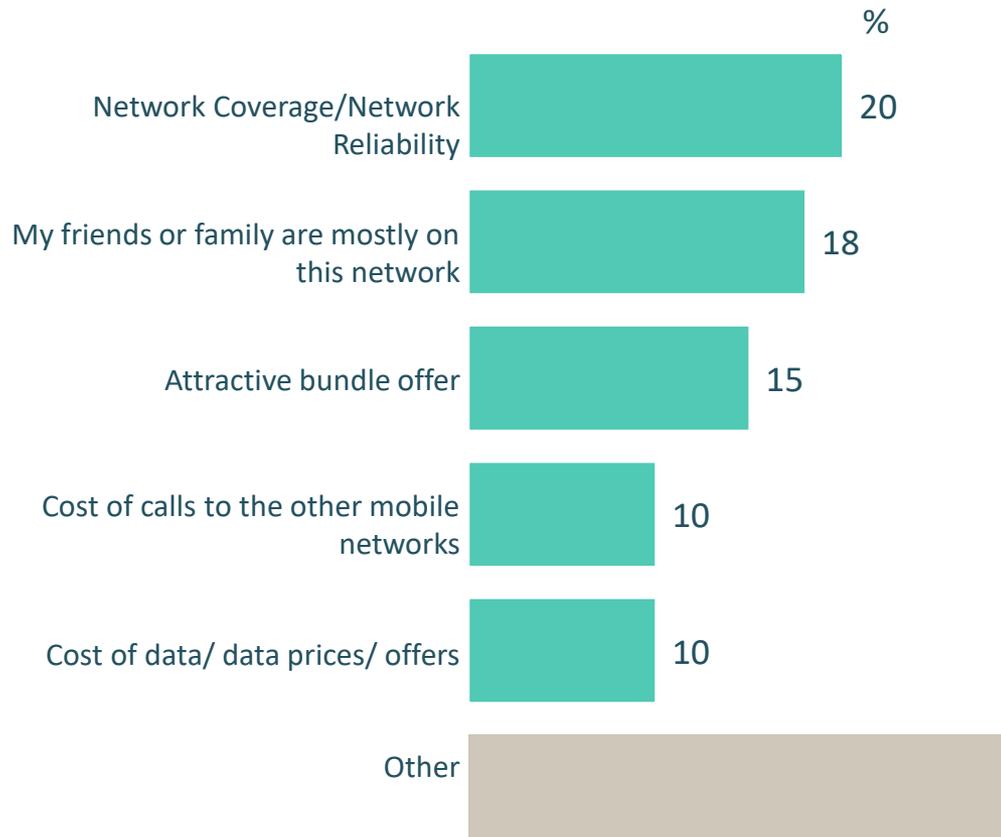
**Amongst all those in the survey that have changed supplier, the reliability and coverage of the network is the most commonly cited driver for choosing their current supplier.**



# Most Important Reasons For Choosing Current Mobile Supplier

(Base: All Changed Operator - 281)

Q. Thinking about when you chose your current mobile operator, please select the top three reasons out of the following set of possible reasons which were important to your decision to choose your mobile operator?



Current Mobile Phone Provider			Mobile Tariff	
Vodafone (67)	Meteor (53)	Three (93)	Prepay (101)	Bill Pay (95)
35%	6%	21%	18%	22%
15%	31%	18%	29%	6%
12%	15%	13%	8%	22%
4%	19%	7%	10%	10%
4%	13%	11%	9%	10%

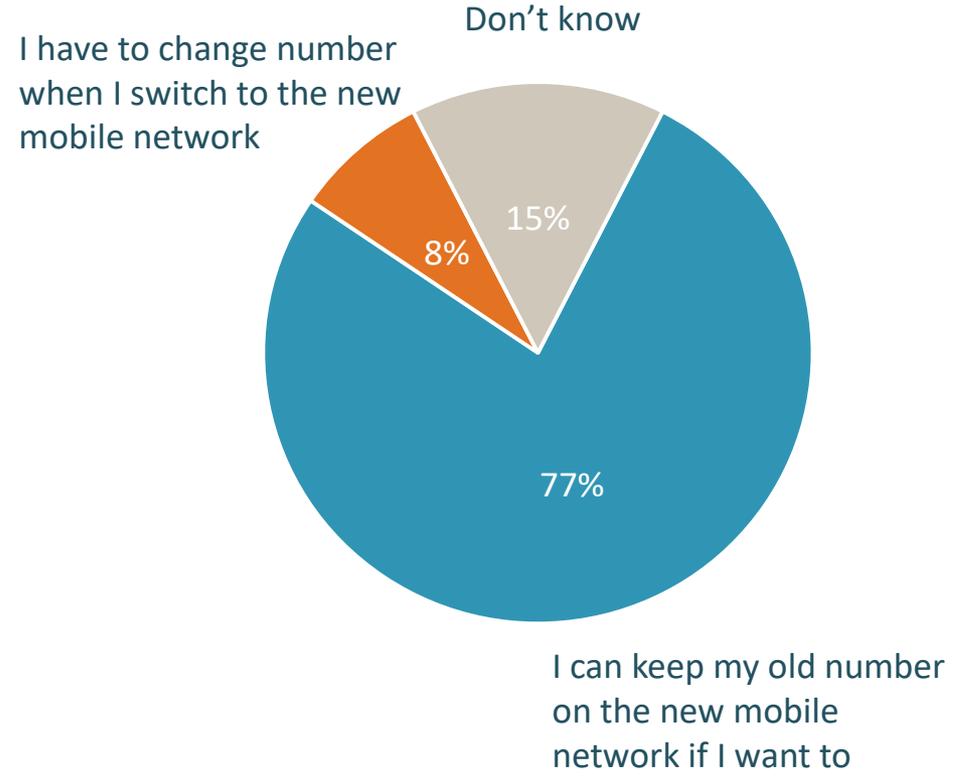
Amongst all those in the survey that have changed supplier, the reliability and coverage of the network is the most commonly cited driver for choosing their current supplier.



# If You Were To Change Mobile Network Which Of the Following Do You Think Is Correct

(Base: All Mobile Users – 1,038)

*Q. If you were to change your mobile service provider, which of the following is correct?*



	Age		
	15-34 (379)	35-54 (379)	55+ (280)
I can keep my old number on the new mobile network if I want to	78%	79%	75%
I have to change number when I switch to the new mobile network	9%	8%	5%
Don't know	13%	13%	20%

**77% of all taking the survey are aware that they can keep their old number in the event of switching network – 8% believe that they would have to change their number.**





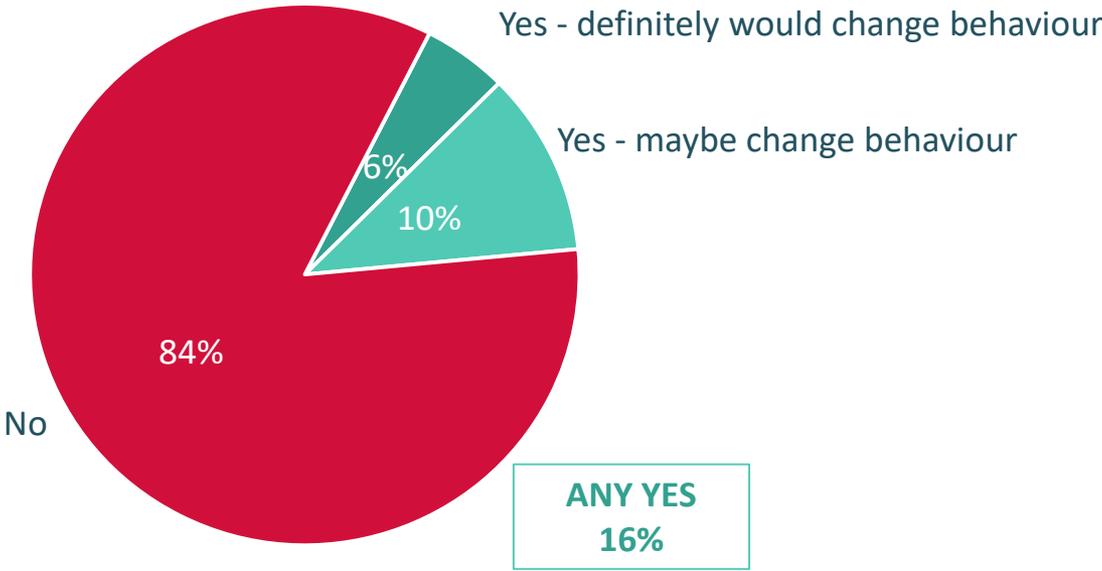
**SSNIP**

# Change Behaviour If Call Price Increased By 1 Cent Per Min: Mobile-to-Mobile

(Base: All Mobile Users – 1,038)

*Imagine if your mobile operator increased the per minute cost of making calls to a mobile on a specific mobile network - one that is a different network to your mobile network by 1 cent per minute.*

*Q. As a consequence of this 1 cent per minute increase in the cost of calling this specific mobile network, do you believe that you would change your behaviour when considering calling people on this other mobile network?*



Any No Change Behaviour (871)	
OTT Voice users	
Yes	49%
No	23%
N/A*	28%

Any Yes Change Behaviour (167)	
OTT Voice users	
Yes	60%
No	23%
N/A*	17%

\*N/A refers to those that do not own a SmartPhone

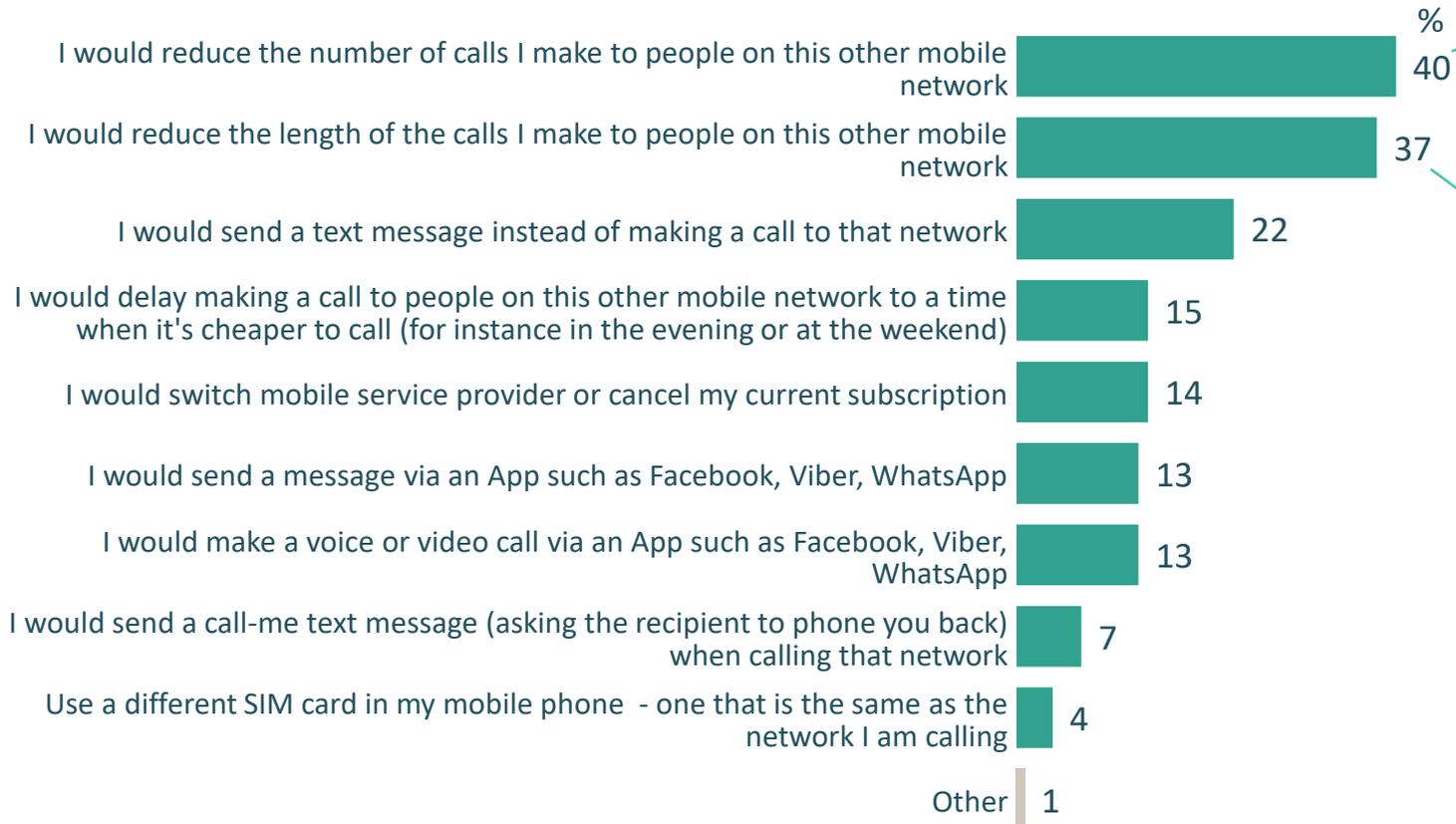
**6% of the total survey sample say that they would definitely change their behaviour if mobile calls increased by 1 cent per minute.**



# Likely Action If Call Price Increased By 1 Cent Per Min: Mobile-to-Mobile

(Base: All That Might or Would Change Behaviour Due To 1c p/m Increase - 166)

Q. In what ways would you change your behaviour? (Please pick up to three)



57% stating this say they would do this often or all the time

50% stating this say they would do this often or all the time

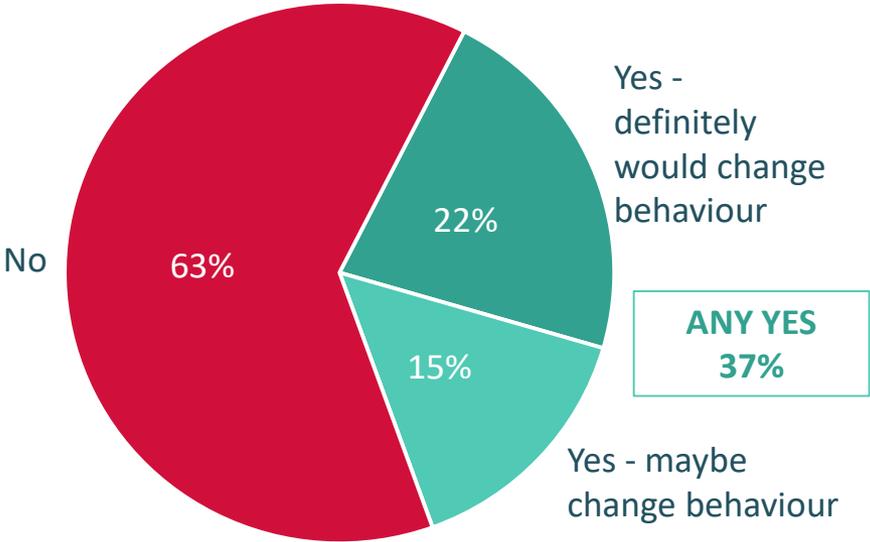
Amongst those in the survey claiming that they might or definitely would change their behaviour if mobile calls to another mobile network increased by 1c p/m, 40% say they would reduce the number of calls to that network



# Change Behaviour If Call Price Increased By 3 Cent Per Min – Mobile to Mobile Different Network

(Base: All Mobile Users – 1,038)

*Imagine if your mobile operator increased the per minute cost of making calls to a mobile on a specific mobile network - one that is a different network to your mobile network by 3 cent per minute.*  
*Q. As a consequence of this 3 cent per minute increase in the cost of calling this specific mobile network, do you believe that you would change your behaviour when considering calling people on this other mobile network?*



Any No Change Behaviour (652)	
OTT Voice users	
Yes	48%
No	24%
N/A*	28%

Any Yes Change Behaviour (386)	
OTT Voice users	
Yes	56%
No	20%
N/A*	24%

\*N/A refers to those that do not own a SmartPhone

**22% of those surveyed say that they would change their behaviour if calls to another mobile network were to increase by 3c per minute and a further 15% say they might change behaviour in this circumstance.**



# Likely Action If Call Price Increased By 3 Cent Per Min – Mobile to Mobile Different Network

(Base: All That Might or Would Change Behaviour Due To 3c p/m Increase - 384)

*Q. In what ways would you change your behaviour?*



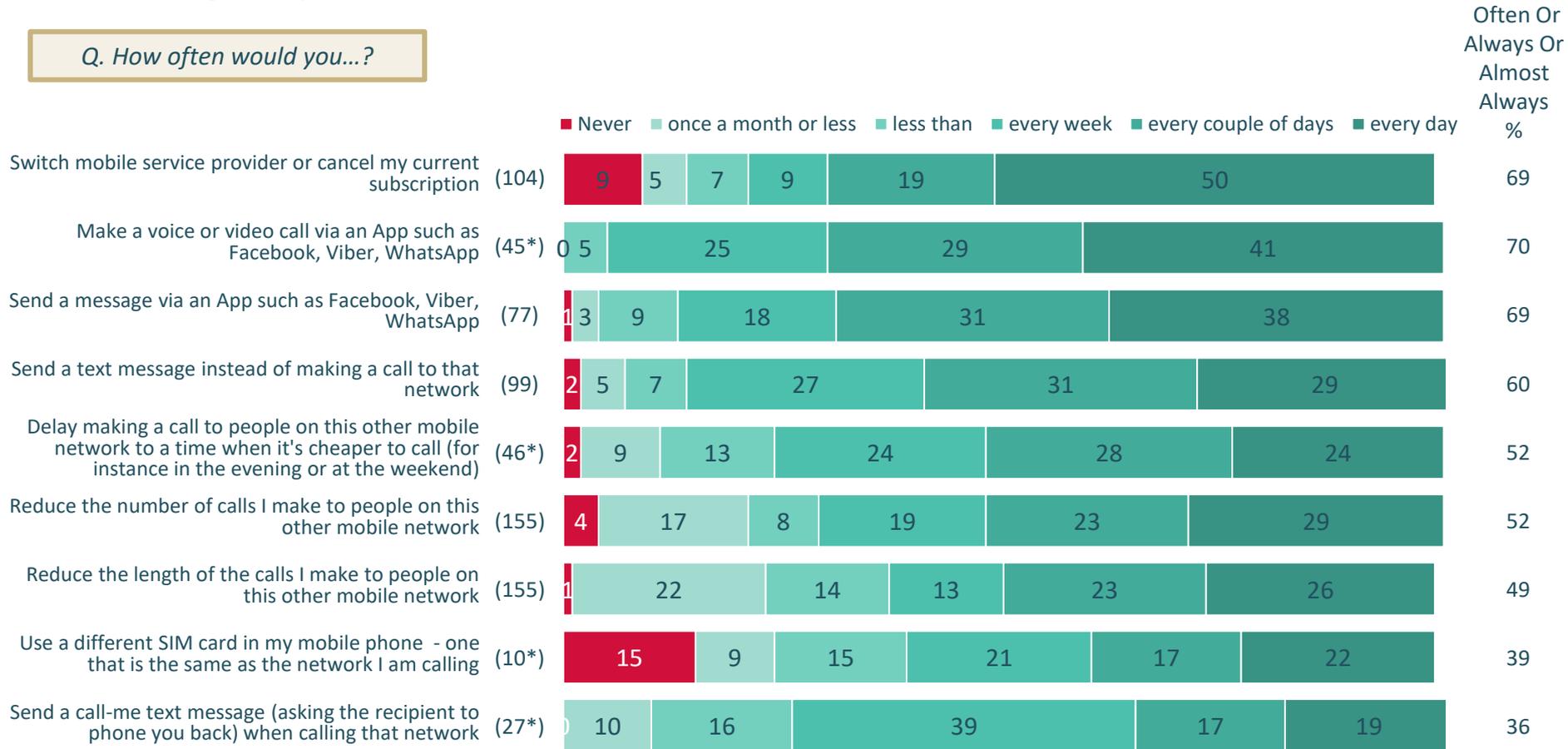
**Amongst those in the survey claiming that they might or definitely would change their behaviour if calls to another mobile network increased by 3c per minute, 41% say that they would reduce the number of calls to this network**



# Frequency Of Action That Might Be Considered If Call Price Increased By 3 Cent P/M - Mobile

(Base: All Selecting Each Option: Base Shown in Brackets Below)

Q. How often would you...?



\*Caution: Small Base Size

**In terms of frequency, amongst those in the survey saying they would switch mobile provider or cancel their current subscription due to calls to another network increasing by 3c p/m, 69% say that they would do this often, almost always or always.**

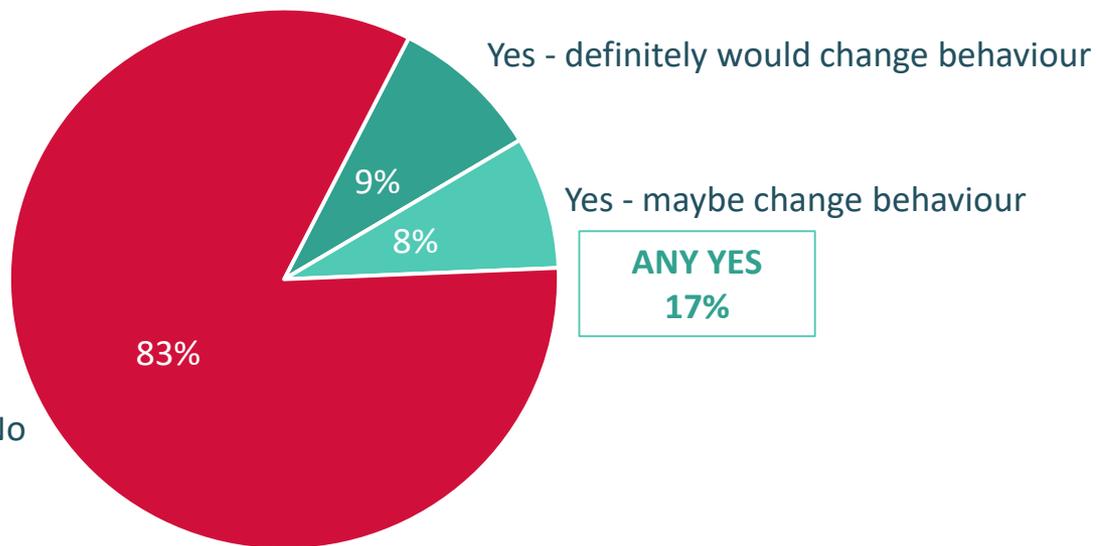


# Change Behaviour If Call Price Increased By 1 Cent Per Minute: Fixed to Mobile

(Base: All Owners Of Fixed Home Phone Line – 560)

*Now imagine if your fixed line home phone operator increased the per minute cost of making calls to a mobile phone on a particular mobile network by 1 cent.*

*Q. As a consequence of this 1 cent per minute increase, do you believe that you would change your behaviour when considering making a call from your home phone line to people on this particular mobile operator's network?*



OTT Voice users	Any No Change Behaviour (465)
Yes	26%
No	56%
N/A*	18%

OTT Voice users	Any Yes Change Behaviour (95)
Yes	21%
No	62%
N/A*	17%

\*N/A refers to those that do not own a SmartPhone

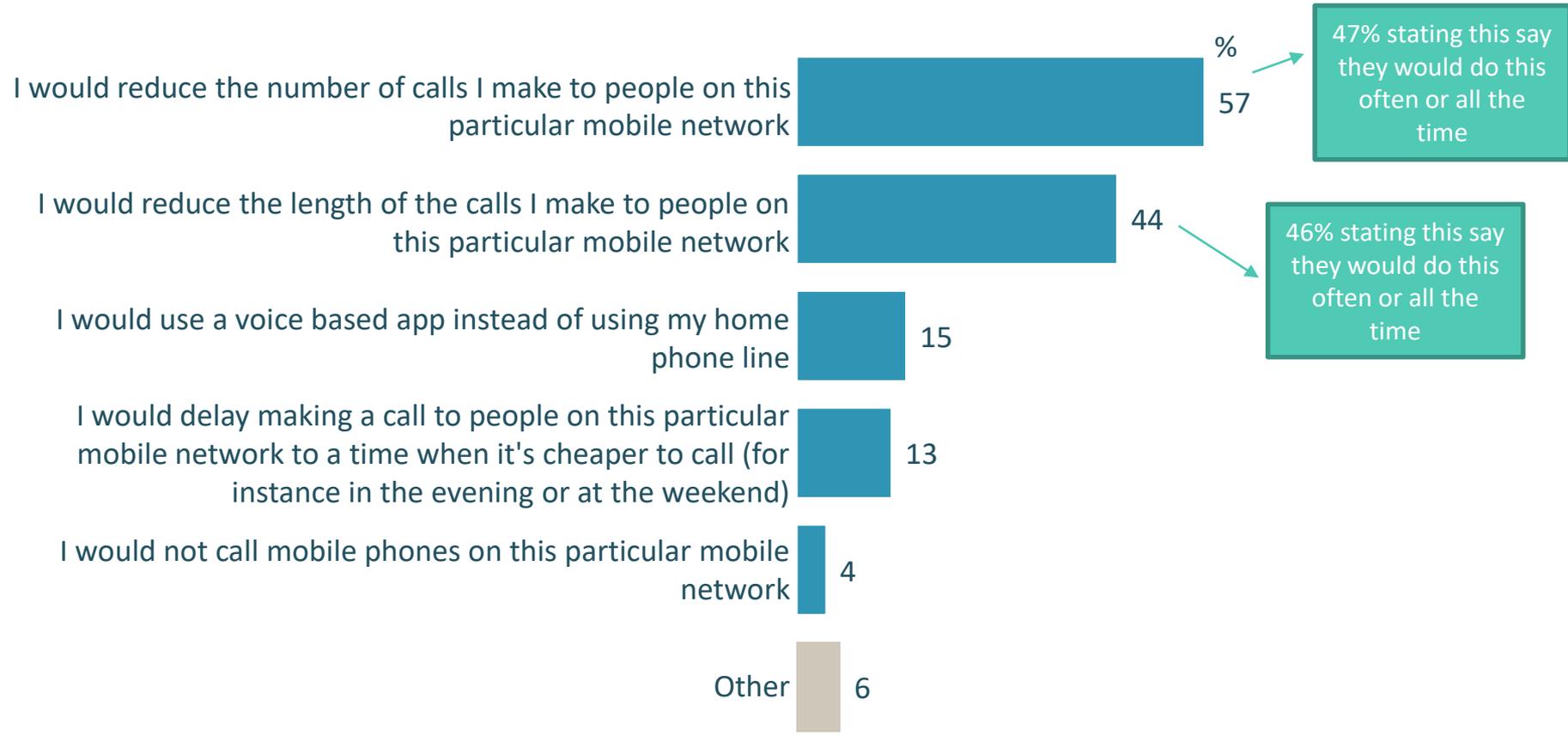
Amongst fixed line owners in this survey, 9% say that they would definitely change their behaviour if landline to mobile calls increased by 1cent per minute. A further 8% say that they may change their behaviour.



# Likely Action If Price Increased By 1 Cent: Fixed to Mobile

(Base: All Might or Would Change Behaviour Due To 1c p/m Increase of Landline to Mobile Calls - 95)

Q. In what ways would you change your behaviour when calling from you home phone line? (Please select up to a maximum of two)



Amongst fixed line owners in the survey claiming they might or would change their behaviour if landline to mobile calls on a particular network were to rise by 1c per minute , 56% would reduce the number of calls to that network





# Questionnaire

# Questionnaire



165716 CONSUMER MVCT SURVEY 2016  
FINAL QUESTIONNAIRE

Good morning/afternoon/evening. I am \_\_\_\_\_ from RED C Research & Marketing, an independent Irish market research agency. We are carrying out a survey today about access to and usage of telecommunications. Would you mind answering a few questions?

## CLASSIFICATION SECTION

**INTERVIEWER:** If asked, regular would defined as at least once a month.

**SCRIPTER:** ASK ALL RESPONDENTS

**BASE:** ALL ADULTS

Q.1 Can I confirm that you own and regularly use a mobile phone?

1. Yes

**SCRIPTER:** ASK ALL CODE 2 Q1.

**BASE:** ALL WHO DON'T CONFIRM HAVING A MOBILE PHONE AND USING IT REGULARLY

Q.2 Do you own a mobile phone which you don't regularly use?

1. Yes

**SCRIPTER:** SINGLE CODE. ASK CODE 1 Q1 OR CODE 1 Q2 OR CODE 1 Q3

**BASE:** ALL USERS OF MOBILE PHONES

Q.4 For which purpose is this phone primarily used, is it

1. Personal only
2. Business only [NEEDS TO GO ON QUOTAS SHEET AS TERMINATE INTERVIEW]
3. Both

**INTERVIEWER:** DO NOT READ OUT, RECORD GENDER

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 1 OR 3 Q4.

**BASE:** ALL USERS OF MOBILE PHONES FOR PERSONAL PURPOSE

Before asking about your mobile phone, I would like to ask you general questions about yourself.

1. Male
2. Female

**INTERVIEWER: SHOWCARD 1**

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 1 OR 3 Q4.

**BASE:** ALL USERS OF MOBILE PHONES FOR PERSONAL PURPOSE

Q.5 May I ask what age category you were on your last birthday?

1. 15 - 24
2. 25 - 34
3. 35 - 44
4. 45 - 54
5. 55 - 64
6. 65+
7. Refused



**SCRIPTER:** SINGLE CODE. ASK ALL CODE 1 OR 3 Q4.

**BASE:** ALL USERS OF MOBILE PHONES FOR PERSONAL PURPOSE

Q.6 Which of the following best describes your circumstances?

1. I live in the home I own
2. I live in the home owned by a family member
3. I rent my home
4. Other (please specify)

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 1 OR 3 Q4.

**BASE:** ALL USERS OF MOBILE PHONES FOR PERSONAL PURPOSE

Q.7 Which of the following best describes your occupation

1. Full-time education
2. Full-time employment outside of the home
3. Part-time employment outside of the home
4. Carer in the home (looking after relative or family)
5. Employment in the home
6. Not currently in paid employment

**SCRIPTER:** ASK ALL CODE 1 OR 3 Q4.

**BASE:** ALL USERS OF MOBILE PHONES FOR PERSONAL PURPOSE

Q.8 What is the occupation of the chief income earner in your household?

[CAPTURE OCCUPATION AND CODE AS SOCIO-ECONOMIC GROUP AT END OF SURVEY]

1. AB
2. C1
3. C2
4. DE
5. F [RECORD ALL FARMERS]
6. Refused

**INTERVIEWER: SHOWCARD 2**

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 1 OR 3 Q4.

**BASE:** ALL USERS OF MOBILE PHONES FOR PERSONAL PURPOSE

Q.9 What best describes your nationality

1. Irish
2. UK/British
3. Continental Europe
4. Africa
5. Middle East
6. North America
7. South America
8. Asia
9. Australia and New Zealand
10. Other (please specify)

## Mobile Phone Usage

**INTERVIEWER:** IF ASKED, A SIM CARD IS FOR PERSONAL PHONE CALLS

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 1 OR 3 Q4.

**BASE:** ALL USERS OF MOBILE PHONES FOR PERSONAL PURPOSE

Q.10 Do you have more than one active (used in the last month) mobile phone number (each number might correspond to a separate phone) or do you have several active (used in the last month) SIM cards which you swap into a single phone?

1. Yes – I have 1 active phone number/SIM card
2. Yes – I have 2 active phone numbers/SIM cards
3. Yes – I have 3 active phone numbers/SIM cards
4. Yes – I have \_\_\_\_\_[insert number] active phone numbers/SIM cards
5. No

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 2 OR 3 Q10.

**BASE:** ALL USERS OF 2 OR MORE MOBILE PHONE NUMBERS.

Q.11 Which best describes what you do with your personal mobile phone?

1. I use more than one SIM card with the same mobile phone
2. I have multiple mobile phones that I regularly, use each with their own SIM card

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 2 OR 3 Q10.

**BASE:** ALL USERS OF 2 OR MORE MOBILE PHONE NUMBERS.

Q.12 Do you use more than one of these phone numbers primarily for personal calls (perhaps using the other mostly for business calls)?

1. Yes – I use more than one for personal calls
2. No – I mostly use only one for personal calls

**SCRIPTER:** MULTI CODE. ASK ALL CODE 2 OR 3 Q10.

**BASE:** ALL USERS OF 2 OR MORE MOBILE PHONE NUMBERS

Q.13 Why do you have more than one mobile phone number?

1. In order to reduce cost – allowing me to call other mobiles on the same network
2. In order to reduce cost – allowing me to pick the best price for a call/other service (such as unlimited calls or cheaper costs at different times)
3. Personal reasons
4. One or more phones is for a mobile operator in another country (for instance a UK phone)
5. Other (please specify) \_\_\_\_\_ [CAPTURE]

**SCRIPTER:** MULTI CODE. ASK ALL CODE 2 Q11.

**BASE:** ALL USERS OF 2 OR MORE MOBILE PHONE NUMBERS FOR PERSONAL CALLS

Q.14 How many personal mobile phones do you use at least once a month?

1. 1
2. 2
3. More than 2

*I am interested in the phone that you use primarily for personal calls.  
Please think about this phone when you are answering the rest of the questions.*

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 1 OR 3 Q4.

**BASE:** ALL USERS OF MOBILE PHONES FOR PERSONAL PURPOSE

Q.15 And how often do you use your phone?

1. More than once a day
2. Approximately once a day
3. Approximately once every couple of days
4. Approximately once a week
5. Less frequently

**INTERVIEWER: SHOWCARD 3**

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 1 OR 3 Q4.

**BASE:** ALL USERS OF MOBILE PHONES FOR PERSONAL PURPOSE

Q.16 Who is your current mobile phone operator?

1. Vodafone
2. Meteor
3. Three (also known as H3GI and O2)
4. Tesco Mobile
5. eMobile/eir
6. Lycamobile
7. ID Mobile/Carphone Warehouse
8. Virgin Mobile
9. Postfone
10. 48
98. Other \_\_\_\_\_ (please specify)
99. Don't Know

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 1 OR 3 Q4.

**BASE:** ALL USERS OF MOBILE PHONES FOR PERSONAL PURPOSE

Q.17 Thinking about the calls you make and receive on your mobile phone, which of the following best describes you usage in a typical month

1. I usually make more calls than I receive
2. I usually make and receive a similar number of calls
3. I usually receive more calls than I would make
4. Don't know

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 1 OR 3 Q4.

**BASE:** ALL USERS OF MOBILE PHONES FOR PERSONAL PURPOSE

Q.18 Have you switched the price plan/packages you are on with your operator in the last 12 months?

1. Yes
2. No

Q.18a Does your purchase your mobile phone service as part of a bundle including other telecommunication services (such as fixed line, broadband, etc.) from the same supplier?

1. Yes
2. No
3. Dont know

**INTERVIEWER:** MULTICODE. SHOWCARD 4

**SCRIPTER:** ALL CODE 1 AT Q18a

**BASE:** ALL Consumer with Mobile Phone in a bundle

18.b Apart from mobile phones, what other services are included in this bundle? ALLOW MULTICODE

1. Fixed line phone
2. Fixed line Broadband
3. Mobile broadband
4. TV
5. Don't know

**INTERVIEWER:** SINGLECODE

**SCRIPTER:** INSERT CODES SELECTED AT Q15.b, SINGLECODE

**BASE:** ALL Consumer with Mobile Phone in a bundle

18.c Which of these would you consider to be the main/most important element of the bundle?

INSERT CODES SELECTED AT Q18.b  
Mobile Phone

**Mobile Phone Functionality**

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 1 OR 3 Q4.

**BASE:** ALL USERS OF MOBILE PHONES FOR PERSONAL PURPOSE

Q.19 Which of the following best describes the capabilities of your mobile phone:

1. My mobile phone is a smartphone (allows me to access email, download apps and surf the web) [NOTE TO INTERVIEWER: CAPTURE IF THE PHONE HAS THESE FEATURES EVEN IF THE RESPONDENT DOES NOT USE THESE FEATURES]
2. My mobile phone is not a smartphone (does not allow me to access email, download apps and surf the web)

**INTERVIEWER:** SHOWCARD 5

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 1 OR 3 Q4. ONLY ASK OPTION 1& 2 IF CODE 2 AT Q.19

**BASE:** ALL USERS OF MOBILE PHONES FOR PERSONAL PURPOSE

Q.20 Could you indicate how often you use any of the following services on your mobile phone?

	5: Every day	4: Every couple of days	3: Every week	2: Less than once a week / more than once a month	1. Once a month or less	0. Never
1. Traditional mobile voice call	5	4	3	2	1	0
2. Standard Text messaging	5	4	3	2	1	0
3. Use email on your mobile phone	5	4	3	2	1	0
4. Social networks (such as Facebook, Instagram twitter) on your mobile phone	5	4	3	2	1	0
5. Internet based applications for voice calls such as VoIP, Skype, Internet call, on your mobile phone	5	4	3	2	1	0
6. Internet Messaging applications such as WhatsApp, Viber on your mobile phone	5	4	3	2	1	0
7. Internet Browsing (data use for surfing web, downloading video etc..) on your mobile phone	5	4	3	2	1	0
8. Streaming TV Apps and Video-on Demand (e.g. Netflix)	5	4	3	2	1	0
9. Play Games (online/already downloaded/offline)	5	4	3	2	1	0
10. Shopping online	5	4	3	2	1	0

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 1 AT Q.19

**BASE:** ALL USERS OF SMARTPHONES

Q.21a How often do you receive voice or video calls on your mobile via internet based Apps (such as Skype, Viber, WhatsApp etc.)

1. Never
2. Approximately once a day
3. Approximately once every couple of days
4. Approximately once a week
5. Approximately once a month
6. Less frequently

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 1 AT Q.19

**BASE:** ALL USERS OF SMARTPHONES

Q.21b How often do you use Internet based applications (such as Skype, Viber, WhatsApp etc.) for voice or video calls from your mobile phone?

1. Never
2. Approximately once a day
3. Approximately once every couple of days
4. Approximately once a week
5. Approximately once a month
6. Less frequently

**SCRIPTER:** OPEN ANSWER. ASK ALL CODE 2-6 AT Q. 21b

**BASE:** ALL USERS OF SMARTPHONES

Q.22 Why do you use Skype, internet calls or VoIP on your mobile?

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 1 AT Q.19

**BASE:** ALL USERS OF SMARTPHONES

Q.22a How often do you receive internet based messages on your mobile via internet based Apps (such as Skype, Viber, WhatsApp etc.)

7. Never
8. Approximately once a day
9. Approximately once every couple of days
10. Approximately once a week
11. Approximately once a month
12. Less frequently

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 1 AT Q.19

**BASE:** ALL USERS OF SMARTPHONES

Q.22b How often do you use Internet based messages (such as Skype, Viber, WhatsApp etc.) from your mobile phone?

7. Never
8. Approximately once a day
9. Approximately once every couple of days
10. Approximately once a week
11. Approximately once a month
12. Less frequently

**SCRIPTER:** OPEN ANSWER. ASK ALL CODE 2-6 AT Q. 21b

**BASE:** ALL USERS OF SMARTPHONES

Q.22c Why do you use Skype, internet calls or VoIP on your mobile?

Mobile Phone Cost
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**SCRIPTER:** SINGLE CODE. ASK ALL CODE 1 OR 3 Q4.

**BASE:** ALL USERS OF MOBILE PHONES FOR PERSONAL PURPOSE

Q.23 Who pays for your mobile phone usage?

1. I pay for it myself
2. It is paid by a family member
3. It is paid for by my employer
4. Other (please specify) \_\_\_\_\_

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 1 OR 3 Q4.

**BASE:** ALL USERS OF MOBILE PHONES FOR PERSONAL PURPOSE

Q.24 Is your mobile plan/package a prepay package (where you buy credit before you can make a call) or bill pay package (where you have a contract with your operator and subsequently receive a bill for calls, texts or other services you used in the previous month)?

1. Prepay
2. Bill pay

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 1 OR 3 Q4.

**BASE:** ALL USERS OF MOBILE PHONES FOR PERSONAL PURPOSE

Q.25 When you first signed up to your mobile plan/package did you also receive/hire /purchase a mobile phone at the same time (you might have changed your phone since then – we are interested in when you first signed-up to your plan or package)?

1. Yes
2. No

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 1 Q25.

**BASE:** ALL RESPONDENCE BOUGHT A MOBILE PHONE AT THE SAME TIME AS MOBILE PLAN/PACKAGE

Q.26 Did you buy the phone at the same time as signing up to your operator or did you buy a SIM card without a phone (you might have changed your phone since then – we are interested in when you first signed-up to your plan or package)?

1. Bought the phone at the same time as signing up
2. Bought a SIM card without a phone

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 1 Q25 AND CODE 2 Q26.

**BASE:** ALL RESPONDENCE BOUGHT A MOBILE PHONE AT THE SAME TIME AS MOBILE PLAN/PACKAGE

Q.27 How much did you pay for your mobile phone?

1. € \_\_\_\_\_
2. Don't know

**INTERVIEWER: SHOWCARD 6**

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 2 Q.27.

**BASE:** ALL RESPONDENCE BOUGHT A MOBILE PHONE AT THE SAME TIME AS MOBILE PLAN/PACKAGE

Q.28 Approximately how much did it cost?

1. Nothing – it was free
2. Less €20
3. Between €21 and €50
4. Between €51 and €100
5. Between €101 and €150
6. Between €151 and €200
7. More than €200

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 2 Q24.

**BASE:** ALL USERS OF BILL PAY

Q.29 What is the name of your plan/package?

1. \_\_\_\_\_ [CAPTURE]
2. Don't know

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 2 Q24.

**BASE:** ALL USERS OF BILL PAY

Q.30 Does your mobile plan/package include a set number of inclusive minutes which you can use to make calls at no extra cost?

1. Yes, a fixed amount is included
2. Yes, an unlimited amount is included
3. None included
4. Don't know

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 1 OR 2 Q30.

**BASE:** ALL USERS OF BILL PAY WITH INCLUSIVE MINUTES

Q.31 Can you use your inclusive minutes to make calls to people on any mobile network or only to people on the same mobile network as you?

1. Any network
2. Only on the same network
3. Don't know

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 1 OR 2 Q30.

**BASE:** ALL USERS OF BILL PAY WITH INCLUSIVE MINUTES

Q.32 Can you use your inclusive minutes to make calls to fixed line phones?

1. Yes
2. No
3. Don't know

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 2 Q24.

**BASE:** ALL USERS OF BILL PAY

Q.33 Does your mobile plan/package include a set number of inclusive text messages which you can use at no extra cost?

1. Yes, a fixed amount of text messages is included
2. Yes, an unlimited amount of text messages is included
3. None included
4. Don't know

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 1 OR 2 Q33.

**BASE:** ALL USERS OF BILL PAY WITH INCLUSIVE MESSAGES

Q.34 Can you use your inclusive text messages to send texts to people on any mobile network or only to people on the same mobile network as you?

1. Any network
2. Only on the same network
3. Don't know

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 2 AND 3 AT Q.30 AND CODE 2 AND 3 AT Q.33.

**BASE:** ALL USERS OF BILL PAY WITH INCLUSIVE MESSAGES

Q.35 Do you typically use more than your set amount of inclusive minutes and text messages?

1. Typically use more than the inclusive minutes or text messages
2. Typically don't use more than the inclusive minutes or text messages
3. Don't think about it as I have unlimited use of minutes or texts
4. Don't know

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 2 Q24.

**BASE:** ALL USERS OF BILL PAY

Q.36 How much does your basic mobile plan/package cost per month (i.e. the recurring cost of your plan/package before taking into account the cost of any additional calls or other services which are not included in your basic package)?

1. €\_\_\_\_\_ [RECORD]
2. Don't know

**INTERVIEWER: SHOWCARD 7**

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 2 Q36.

**BASE:** ALL USERS OF BILL PAY D.K. BASIC COST PER MONTH

Q.37 Approximately how much does your basic mobile plan/package cost per month?

1. Up to €10
2. Between €11 and €20
3. Between €21 and €30
4. Between €31 and €40
5. Between €41 and €50
6. Between €51 and €60
7. Between €61 and €80
8. Between €81 and €100
9. More than €100
10. Don't know

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 2 Q24.

**BASE:** ALL USERS OF BILL PAY

Q.38 And what would your total monthly mobile bill typically be (i.e. including the basic cost of your plan/package and the cost of any additional calls or other services which are not included in your basic plan/package)?

1. €\_\_\_\_\_ [RECORD]
2. Don't know

**INTERVIEWER: SHOWCARD 8**

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 2 Q38.

**BASE:** ALL USERS OF BILL PAY D.K. TOTAL COST PER MONTH

Q.39 Approximately how much would your total monthly mobile bill typically be (i.e. including the cost of your plan/package)?

1. Up to €20
2. Between €21 and €40
3. Between €41 and €60
4. Between €61 and €80
5. Between €81 and €120
6. Between €121 and €160
7. Between €161 and €200
8. More than €200
9. Don't know

Home Phone

SCRIPTER: ASK ALL RESPONDENTS

BASE: ALL ADULTS

Q.40 In your home, do you have a home phone line (also sometimes called a fixed line phone connected that is use to make and received personal calls), provided by companies such as Eircom, UPC, Imagine, Sky, Vodafone or Digiweb?

1. Yes
2. No

INTERVIEWER: SHOWCARD 9

SCRIPTER: SINGLE CODE. ASK ALL CODE 1 Q40.

BASE: ALL OWNERS OF HOME PHONE LINE

Q.41 Which company provides your home phone line service?

1. Clearwire
2. Digiweb
3. Vodafone at Home
4. Sky
5. Euphony
6. Gaelic Telecom
7. Imagine
8. Irish Broadband
9. Magnet
10. Pure
11. Smart
12. 3 (including O2)
13. eir (Formerly eircom)
14. Virgin Media (Formerly UPC)
98. Other \_\_\_\_\_(please specify)

SCRIPTER: SINGLE CODE. ASK ALL CODE 1 Q40.

BASE: ALL OWNERS OF HOME PHONE LINE

Q.42 Does your home phone line plan/package include a set number of minutes that can be used to make calls to mobiles at no extra cost?

1. Yes – to mobile phones on any network
2. Yes - to mobile phones on specified network
3. No – no calls are included
4. Don't know

SCRIPTER: SINGLE CODE. ASK ALL CODE 1 Q40.

BASE: ALL OWNERS OF HOME PHONE LINE

Q.43 Please indicate how frequently you use your home phone line for the following purposes.

	5: Every day	4: Every couple of days	3: Every week	2: Less than once a week / more than once a month	1. Once a month or less	Not at all
To call other fixed line phones	1	2	3	4	5	6
To call mobile phones	1	2	3	4	5	6

SCRIPTER: SINGLE CODE. ASK ALL CODE 1 Q40. IF ANSWERING CODES 1 AND 2, THEN ADDS TO 100%.

BASE: ALL OWNERS OF HOME PHONE LINE

Q.44 Thinking about the calls you make from your home phone line in a typical month, could you state the proportion of calls which are to mobile phones and which are to fixed line phones?

1. calls to mobile phones \_\_\_%
2. calls to fixed line phones (i.e. any phone number which is not a mobile phone) \_\_\_%
3. Don't make any outgoing calls
4. Don't know

SCRIPTER: SINGLE CODE. ASK ALL CODE 1 Q40.

BASE: ALL OWNERS OF HOME PHONE LINE

Q.45 Thinking about the calls you make from your home phone line in a typical month, which of the following most accurately describes your usage?

1. I make the same amount of calls to mobile phones as I make to fixed line phones
2. I make more calls to mobile phones than I make to fixed line phones
3. I make more calls to fixed line phones than I make to mobile phones
4. I Don't know

SCRIPTER: SINGLE CODE. ASK ALL CODE 2 Q40.

BASE: ALL WHO NOT OWN HOME PHONE LINE

Q.46 Why don't you have a home phone line?

1. To save money
2. Prefer to use only mobile phone
3. Not my decision
4. Other (please specify) \_\_\_\_\_ [CAPTURE]

SCRIPTER: SINGLE CODE. ASK ALL CODE 1 Q40.

BASE: ALL OWNERS OF HOME PHONE LINE

Q.47 Thinking of your use of your fixed line home phone over the last 12 months, have you noticed any changes in the cost of making calls to mobile phones?

1. Yes
2. No
3. Don't know

SCRIPTER: SINGLE CODE. ASK ALL CODE 1 Q47. ALLOW DON'T KNOW AS AN OPTION

BASE: ALL OWNERS OF HOME PHONE LINE NOTICED CHANGES IN COST

Q.48 Have you noticed the cost of any of the following changing?

1. Cost of calls from your home phone to mobile phones in general  

Increased	No change	Decreased
-----------	-----------	-----------
2. Cost of calls from your home phone to mobile phones on particular networks  

Increased	No change	Decreased
-----------	-----------	-----------

Cost of Different Call Types
------------------------------

SCRIPTER: SINGLE CODE. ASK ALL CODE 2 Q24.

BASE: ALL USERS OF BILL PAY

Q.49 Thinking again about your mobile phone, could you state whether you know the cost of making calls/ cost of making calls as part of your bundle package?

1. Know the exact cost of calls
2. Know the approximate cost of calls
3. Don't know or not sure of the cost of calls

SCRIPTER: SINGLE CODE. ASK ALL CODE 1 OR 2 Q49.

BASE: ALL USERS KNOWING COST OF MAKING CALLS

Q.50 Thinking about the cost of making calls on your plan/package after any set amount of inclusive minutes/texts have been used, what the costs are for the following:

	Cost Per Minute
Cost of calls to mobiles on different mobile network to you	____cent Don't Know
Cost of calls to mobiles on the same mobile network as you	____cent Don't Know
Cost of calls to fixed line phones	____cent Don't Know

SCRIPTER: SINGLE CODE. ASK ALL CODE 1 OR 2 Q49.

BASE: ALL USERS KNOWING COST OF MAKING CALLS

Q.51 Do the costs of making calls on your plan/package vary according to when calls are made (daytime, evening, weekend)?

1. Costs vary depending on the time or day
2. Costs do not vary
3. Don't know

SCRIPTER: SINGLE CODE. ASK ALL CODE 2 Q24.

BASE: ALL USERS OF MOBILE PHONES FOR PERSONAL PURPOSE

Q.52 Thinking about your mobile plan/package again, does your plan/package include a set data allowance at no extra cost?

1. Yes
2. No
3. Don't Know

SCRIPTER: SINGLE CODE. ASK ALL CODE 1 Q24.

BASE: ALL USERS OF PRE PAY

Q.53 What is the name of your pre-pay plan/package?

1. \_\_\_\_ [CAPTURE]
2. Don't know

SCRIPTER: SHOWCARD 10 SINGLE CODE. ASK ALL CODE 1 Q24.

BASE: ALL USERS OF PRE PAY

Q.54 How much credit do you typically buy when you are topping up your mobile phone?

1. €5
2. €10
3. €20
4. €30
5. More than €30 \_\_\_\_ [Capture]

SCRIPTER: SINGLE CODE. ASK ALL CODE 1 Q24.

BASE: ALL USERS OF PRE PAY

Q.55 Approximately how often do you top up your mobile phone?

1. More than once a week
2. Once a week
3. Once every two weeks
4. Once every three weeks
5. Once a month
6. Less than once a month

SCRIPTER: SINGLE CODE. ASK ALL CODE 1 Q24.

BASE: ALL USERS OF PRE PAY

Q.56 Does your pre-pay mobile plan/package include any set number of inclusive minutes which you can use to make calls at no extra cost?

1. Yes, a fixed amount is included
2. Yes, an unlimited amount is included
3. None included
4. Don't know

SCRIPTER: SINGLE CODE. ASK ALL CODE 1 OR 2 Q56.

BASE: ALL USERS OF PRE PAY WITH INCLUSIVE MINUTES

Q.57 Can you use your inclusive minutes to make calls to people on any mobile network or only to people on the same mobile network as you?

1. Any network
2. Only on the same network
3. Don't know

SCRIPTER: SINGLE CODE. ASK ALL CODE 1 OR 2 Q57.

BASE: ALL USERS OF PRE PAY WITH INCLUSIVE MINUTES

Q.58 Can you use your inclusive minutes to make calls to fixed line phones?

1. Yes
2. No
3. Don't know

SCRIPTER: SINGLE CODE. ASK ALL CODE 1 Q24.

BASE: ALL USERS OF PRE PAY

Q.59 Before asking about the costs of different types of call, could you state whether you know the costs for calls/ cost of making calls as part of your bundle package?

1. Know the exact cost of calls
2. Know the approximate cost of calls
3. Don't know or not sure of the cost of calls

SCRIPTER: SINGLE CODE. ASK ALL CODE 1 OR 2 Q59.

BASE: ALL PRE PAY USERS KNOWING COST OF MAKING CALLS

Q.60 Thinking about the cost of making calls on your pre-pay phone after any inclusive minutes have been used, do you know what the costs are for the following:

	Cost Per Minute
Cost of calls to mobiles on different mobile networks to you	____cent Don't Know
Cost of calls to mobiles on the same mobile network as you	____cent Don't Know
Cost of calls to fixed line phones	____cent Don't Know

SCRIPTER: SINGLE CODE. ASK ALL CODE 1 Q24.

BASE: ALL USERS OF PRE PAY

Q.61 Do the costs of making calls or texts on your pre-pay phone vary according to when calls are made (daytime, evening, weekend) or do the costs remain the same irrespective of when calls are made?

1. Costs vary depending on the time or day
2. Costs do not vary
3. Don't know

Awareness of Network Called and Cost

**SHOWCARD 11**

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 1 OR 3 Q4.

**BASE:** ALL USERS OF MOBILE PHONES FOR PERSONAL PURPOSE

Q.62a When you are calling from your mobile phone, to what extent are you aware of which mobile network you are calling?

1. Never aware
2. Occasionally aware
3. Aware half the time
4. Often aware
5. Always aware

**SHOWCARD 11**

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 1 OR 3 Q4.

**BASE:** ALL USERS OF MOBILE PHONES FOR PERSONAL PURPOSE

Q.62b When you are calling your most frequently called mobile numbers from your mobile phone, to what extent are you aware of which mobile network(s) you are calling?

1. Never aware
2. Occasionally aware
3. Aware half the time
4. Often aware
5. Always aware

**INTERVIEWER:** PROBE TO PRECODE

**SCRIPTER:** MULTI CODE. ASK ALL CODE 1-4 AT Q.62a or 62b

**BASE:** ALL NOT AWARE OF CALLING NETWORK

Q.63 Could you explain why you are not always aware of the mobile network you are calling?

[CODE TO PRECODES]

1. I mostly make calls from my mobile phone's address book and don't see or think of the number
2. I can't tell from the mobile number which network the person is on
3. I don't think about the network the other person is on
4. It doesn't matter to me because the calls are included for free in my plan/package
5. It doesn't matter to me what network they are on, if I need to call I just call
6. OTHER (PLEASE SPECIFY) \_\_\_\_ [CAPTURE]

**SCRIPTER:** ASK ALL CODE >1 Q62. IF CODE 1, 2 THEN MUST ADD TO 100%

**BASE:** ALL AWARE OF CALLING NETWORK

Q.64 Thinking about the calls you make from your mobile phone to other mobile phones in a typical month, could you estimate the proportion that are to mobile phones on your network and the proportion that are to mobile phones other networks (use percentages)?

1. calls to mobile phones on your own network \_\_\_\_\_%
2. calls to mobile phones on other networks \_\_\_\_\_%
3. Don't know

**SHOWCARD 12**

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 1 OR 3 Q4.

**BASE:** ALL USERS OF MOBILE PHONES FOR PERSONAL PURPOSE

Q.65 Thinking about the calls you make from your mobile phone to other mobile phones in a typical month, which of the following most accurately describes your usage?

1. I make the same amount of calls to mobile phones on my network as I do to mobile phones on other mobile networks
2. I make more calls to mobile phones on my network than I make to mobile phones on other mobile networks
3. I make more calls to mobile phones on other networks than I do to mobile phones on my mobile network
4. I Don't know

**SCRIPTER:** ASK ALL CODE 1 OR 3 Q4.

**BASE:** ALL USERS OF MOBILE PHONES FOR PERSONAL PURPOSE

Q.66 Are there any ways that you can tell if the number you are calling is on another mobile network

[CODE TO PRECODES]

1. There is no way to tell
2. There is no way to tell but I might know the network if I know the person well
3. From the number – definitely indicates the mobile network
4. From the number – possibly indicates the mobile network
5. There is a tone/sound which you hear when the phone is on another mobile network
6. Don't know
7. Other (please specify) \_\_\_\_\_

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 1 OR 3 Q4.

**BASE:** ALL USERS OF MOBILE PHONES FOR PERSONAL PURPOSE

Q.67 When making a call from your mobile to another mobile network, how often do you think about the cost of the call?

1. Never
2. Occasionally - less than a quarter of the time
3. Approximately a quarter of the time
4. Approximately half the time
5. Often - Around three quarters of the time
6. Almost always or always

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 1 OR 3 Q4.

**BASE:** ALL USERS OF MOBILE PHONES FOR PERSONAL PURPOSE

Q.68 When you are calling from your mobile phone, to what extent are you aware whether the number you are calling is a fixed line phone?

1. Never aware
2. Occasionally aware
3. Aware half the time
4. Often aware
5. Always aware

**INTERVIEWER:** PROBE TO PRECODE

**SCRIPTER:** ASK ALL CODE 1-4 at Q.86

**BASE:** ALL USERS OF MOBILE PHONES FOR PERSONAL PURPOSE

Q.69 Why are you not always aware?

1. I mostly make calls from my address book and don't see the number
2. It doesn't matter to me because the calls are included for free in my plan/package
3. It doesn't matter to me whether the person is on a fixed line phone, if I need to call I just call

**INTERVIEWER: SHOWCARD 13**

**SCRIPTER:** MULTI CODE. ASK ALL CODE 1 OR 3 Q4.

**BASE:** ALL USERS OF MOBILE PHONES FOR PERSONAL PURPOSE

Q.70 Are there any particular types of phone calls that you are concerned about when considering the cost of a call from your mobile phone?

1. Calls to fixed line phones
2. Calls to mobiles on the same network as me
3. Calls to mobiles on other mobile networks to me
4. Calls to international numbers
5. Calls to freephone ( those beginning with 1800) or local (those beginning with 1850 or 1890) numbers
6. Calls to premium numbers such competition, tarot or horoscope lines (those typically beginning with 15XX, 1580,1570 etc)
7. Other (please specify)
8. None in particular

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 1 OR 3 Q4.

**BASE:** ALL USERS OF MOBILE PHONES FOR PERSONAL PURPOSE

Q.80 If someone is calling you on your mobile, to what extent do you know what mobile network they are calling from?

1. Never
2. Occasionally -less than a quarter of the time
3. Approximately a quarter of the time
4. Approximately half the time
5. Often - Around three quarters of the time
6. Almost always or always
7. Don't think about it, as it does not matter to me.

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 1 OR 3 Q4.

**BASE:** ALL USERS OF MOBILE PHONES FOR PERSONAL PURPOSE

Q.90 If someone is calling you on your mobile, to what extent would you know if they are calling from a fixed line network or a mobile network?

1. Never
2. Occasionally -less than a quarter of the time
3. Approximately a quarter of the time
4. Approximately half the time
5. Often - Around three quarters of the time
6. Almost always or always
7. Don't think about it, as it does not matter to me.

**INTERVIEWER:** PROBE TO PRECODE

**SCRIPTER:** ASK ALL CODE 1 OR 3 Q4.

**BASE:** ALL USERS OF MOBILE PHONES FOR PERSONAL PURPOSE

Q.91 Are there any ways that you can tell what mobile network the person calling you is on?

1. There is no way to tell
2. From the mobile number – definitely indicates the network
3. From the mobile number – possibly indicates the network
4. I may just know what network the caller is on but could tell from the mobile number.
5. Other (please specify)
6. Don't know

**SCRIPTER:** ASK ALL CODE 1 OR 3 Q4.

**BASE:** ALL USERS OF MOBILE PHONES FOR PERSONAL PURPOSE

Q.92 When you see an incoming call on your mobile, do you consider what the call will cost the person calling?

1. Never
2. Occasionally - less than a quarter of the time
3. Approximately a quarter of the time
4. Approximately half the time
5. Often - Around three quarters of the time
6. Almost always or always

**SCRIPTER:** ASK ALL CODE 2-6 AT Q92

**BASE:** ALL CONSIDERING COST OF PERSON CALLING

Q.93 You mentioned that you consider what it costs people on other networks to call you. Does this ever cause you change how you treat their calls?

1. Never
2. Occasionally
3. Sometimes
4. Often
5. Always

**INTERVIEWER: SHOWCARD 14**

**SCRIPTER:** ASK ALL CODE 2-5 AT Q.93

**BASE:** ALL CHANGE BEHAVIOR DUE TO CONSIDERING COST OF PERSON CALLING

Q.94 How often would you change how you treat these calls in each of the following circumstances?

	Often - Around three quarters of the time	Approximately half the time	Approximately a quarter of the time	Occasionally - less than a quarter of the time	Often - Around three quarters of the time	Never
When it is a friend or family member who has limited financial means or phone credit	1	2	3	4	5	6
When it is a friend or family member in general	1	2	3	4	5	6
For any caller who I can identify –	1	2	3	4	5	6
For any caller	1	2	3	4	5	6

**INTERVIEWER: SHOWCARD 14**

**SCRIPTER:** ASK ALL CODE > 1 Q90

**BASE:** ALL CONSIDERING COST OF PERSON CALLING

Q.95 When you are aware that the caller is on another network, do you take any of the following actions?

	Often - Around three quarters of the time	Approximately half the time	Approximately a quarter of the time	Occasionally - less than a quarter of the time	Often - Around three quarters of the time	Never
Don't answer the call at all	1	2	3	4	5	6
Don't answer their call but phone them back	1	2	3	4	5	6
Don't answer their call but text them instead	1	2	3	4	5	6
Answer their call but shorten the length of the call	1	2	3	4	5	6

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 1 OR 3 Q4.

**BASE:** ALL USERS OF MOBILE PHONES FOR PERSONAL PURPOSE

Q.96 Thinking of your use of your mobile over the last 12 months, have you noticed any changes in the cost of making calls?

1. Yes
2. No
3. Don't know

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 1 Q96. ALLOW DON'T KNOW

**BASE:** ALL NOTICED CHANGES IN COST OF MAKING CALLS

Q.97 Have you noticed the cost of any of the following changing (and indicate whether you believe the cost has increased or decreased)?

1. Cost of calls to mobile phones on the same network as you
 

Increased	No change	Decreased
-----------	-----------	-----------
2. Cost of calls to mobile phones on other networks
 

Increased	No change	Decreased
-----------	-----------	-----------
3. Cost of text messages to mobile phones on the same network as you
 

Increased	No change	Decreased
-----------	-----------	-----------
4. Cost of text messages to mobile phones on other networks
 

Increased	No change	Decreased
-----------	-----------	-----------

Switching

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 1 OR 3 Q4.

**BASE:** ALL USERS OF MOBILE PHONES FOR PERSONAL PURPOSE

Q.98 How long have you been with your current operator?

1. Within last year
2. Within last year to 18 months
3. More than 18 months and up to two years
4. Between 2 and 3 years
5. 3 years or more
6. Never
7. Don't know

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 1 OR 3 Q4.

**BASE:** ALL USERS OF MOBILE PHONES FOR PERSONAL PURPOSE

Q.99 Were you previously with another mobile phone operator?

1. Yes
2. No

**INTERVIEWER: SHOWCARD 15**

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 1 Q99.

**BASE:** ALL CHANGED OPERATOR

Q.100 Which mobile phone operator were you previously with?

1. Vodafone
2. Meteor
3. Three (also known as H3GI and O2)
4. Tesco Mobile
5. eMobile/eir
6. Lycamobile
7. ID Mobile/Carphone Warehouse
8. Virgin Mobile
9. Postfone
10. 48

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 1 Q99.

**BASE:** ALL CHANGED OPERATOR

Q.101 When you were with your previous operator, was your mobile plan/package, a prepay package (where you buy credit before you can make a call) or bill pay package (where you have a contract with your operator and subsequently receive a bill for calls, texts or other services you used in the previous month)?

1. Prepay
2. Bill pay

**Intro Text:** Please read the following list of options on the Showcard (interviewer – allow time for respondent to read full list)

**INTERVIEWER: SHOWCARD 16. ENSURE TO CLARIFY WHICH OPTION IS CHOSE WITH RESPONDENT**

**SCRIPTER:** MULTI CODE. ASK ALL CODE 1 Q99. RANDOMISE STATEMENTS

**BASE:** ALL CHANGED OPERATOR

Q.102 Thinking about when you chose your current mobile operator, please select the top three reasons out of the following set of possible reasons which were important to your decision to choose your mobile operator:

1. Number of inclusive call minutes included
2. My friends or family are mostly on this network
3. Cost of calls to the other mobile networks
4. The level of customer service offered by the operator
5. 4G availability
6. Attractive bundle offer
7. The price of the handsets
8. Network Coverage/Network Reliability
9. Cost of calls to same mobile networks
10. Trusted brand/mobile service provider
11. Cost of data/Data prices/offers
12. Availability of mobile broadband service with this operator
13. Other (please specify) \_\_\_\_\_ [CAPTURE]

**SCRIPTER:** MULTI CODE. ASK ALL ANSWERED Q102 AND SHOW SELECTED REASONS.

**BASE:** ALL CHANGED OPERATOR

Q.103 Out of those three which was the most important reason?

1. \_\_\_\_\_[CAPTURE NUMBER OF REASON SELECTED]
2. No one reason more important than others

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 1 OR 3 Q4.

**BASE:** ALL USERS OF MOBILE PHONES FOR PERSONAL PURPOSE

Q.104 If you were to change your mobile service provider, which of the following is correct?

1. I can keep my old number on the new mobile network if I want to
2. I have to change number when I switch to the new mobile network
3. Don't know

SSNIP

**SSNIP Test**

I now want to ask you some questions about possible changes in the costs of your mobile phone and how you might react to these price changes. These are not necessarily changes that are planned by your, or any other, mobile phone supplier - however we are interested in your reactions to them if they were to be hypothetically implemented.

Imagine if your mobile operator increased the per minute cost of making calls to a mobile on a specific mobile network - one that is a different network to your mobile network by 1 cent per minute

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 1 Q105.

**BASE:** ALL USERS OF MOBILE PHONES FOR PERSONAL PURPOSE

Q.105 As a consequence of this 1 cent per minute increase in the cost of calling this specific mobile network, do you believe that you would change your behaviour when considering calling people on this other mobile network?

1. YES – definitely would change behaviour
2. Yes – maybe change behaviour
3. NO

**INTERVIEWER: SHOWCARD 17**

**SCRIPTER:** MULTI CODE. ASK ALL CODE 1 OR 2 Q106.

**BASE:** ALL USERS CHANGING BEHAVIOR DUE TO COST OF MAKING CALLS

Q.107 In what ways would you change your behaviour? (Please pick up to three)

1. I would reduce the number of calls I make to people on this other mobile network
2. I would reduce the length of the calls I make to people on this other mobile network
3. I would delay making a call to people on this other mobile network to a time when it's cheaper to call (for instance in the evening or at the weekend)
4. I would send a text message instead of making a call to that network
5. I would send a call-me text message (asking the recipient to phone you back) when calling that network
6. Use a different SIM card in my mobile phone - one that is the same as the network I am calling
7. I would switch mobile service provider or cancel my current subscription
8. I would send a message via an App such as Facebook, Viber, WhatsApp
9. I would make a voice or video call via an App such as Facebook, Viber, WhatsApp
10. Other (please specify)

**INTERVIEWER: SHOWCARD 18****SCRIPTER:** MULTI CODE. ASK ALL CODE 1 OR 2 Q106. DISPLAY THOSE NOT SELECTED IN Q107**BASE:** ALL USERS CHANGING BEHAVIOR DUE TO COST OF MAKING CALLS

- Q.109 Are there any other actions that you might consider taking (Pick as many as you believe they would apply)
1. I would reduce the number of calls I make to people on this other mobile network
  2. I would reduce the length of the calls I make to people on this other mobile network
  3. I would delay making a call to people on this other mobile network to a time when it's cheaper to call (for instance in the evening or at the weekend)
  4. I would send a text message instead of making a call to that network
  5. I would send a call-me text message (asking the recipient to phone you back) when calling that network
  6. Use a different SIM card in my mobile phone - one that is the same as the network I am calling
  7. I would switch mobile service provider or cancel my current subscription
  8. I would send a message via an App such as Facebook, Viber, WhatsApp
  9. I would make a voice or video call via an App such as Facebook, Viber, WhatsApp
  10. Other (please specify)

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 1 OR 3 Q4.**BASE:** ALL USERS OF MOBILE PHONES FOR PERSONAL PURPOSE

Q.110 If the cost of calling another mobile network was increased by 3 cent per minute, do you believe that you would notice the price increase?

1. YES
2. NO

**SCRIPTER:** SINGLE CODE. ASK ALL CODE 1 Q110.**BASE:** ALL USERS OF MOBILE PHONES FOR PERSONAL PURPOSE

Q.111 As a consequence of this 3 cent per minute increase in the cost of calling this specific mobile network, do you believe that you would change your behaviour when considering calling people on this other mobile network?

4. YES – definitely would change behaviour
5. Yes – maybe change behaviour
6. NO

**INTERVIEWER: SHOWCARD 19****SCRIPTER:** MULTI CODE. ASK ALL CODE 1 OR 2 Q111.**BASE:** ALL USERS CHANGING BEHAVIOR DUE TO COST OF MAKING CALLS

- Q.112 In what ways would you change your behaviour? (Please pick up to three)
11. I would reduce the number of calls I make to people on this other mobile network
  12. I would reduce the length of the calls I make to people on this other mobile network
  13. I would delay making a call to people on this other mobile network to a time when it's cheaper to call (for instance in the evening or at the weekend)
  14. I would send a text message instead of making a call to that network
  15. I would send a call-me text message (asking the recipient to phone you back) when calling that network
  16. Use a different SIM card in my mobile phone - one that is the same as the network I am calling
  17. I would switch mobile service provider or cancel my current subscription
  18. I would send a message via an App such as Facebook, Viber, WhatsApp
  19. I would make a voice or video call via an App such as Facebook, Viber, WhatsApp
  20. Other (please specify)

**SCRIPTER:** MULTI CODE. FOR EACH SELECTED IN Q112**BASE:** ALL USERS CHANGING BEHAVIOR DUE TO COST OF MAKING CALLS

Q.113 How often would you [INSERT EACH STATEMENT SELECTED IN Q112]

1. Never
2. Occasionally - less than a quarter of the time
3. Approximately a quarter of the time
4. Approximately half the time
5. Often - Around three quarters of the time
6. Almost always or always

**INTERVIEWER: SHOWCARD 20****SCRIPTER:** MULTI CODE. ASK ALL CODE 1 OR 2 Q111. DISPLAY THOSE NOT SELECTED IN Q112**BASE:** ALL USERS CHANGING BEHAVIOR DUE TO COST OF MAKING CALLS

Q.114 Are there any other actions that you might consider taking (Pick as many as you believe they would apply)

11. I would reduce the number of calls I make to people on this other mobile network
12. I would reduce the length of the calls I make to people on this other mobile network
13. I would delay making a call to people on this other mobile network to a time when it's cheaper to call (for instance in the evening or at the weekend)
14. I would send a text message instead of making a call to that network
15. I would send a call-me text message (asking the recipient to phone you back) when calling that network
16. Use a different SIM card in my mobile phone - one that is the same as the network I am calling
17. I would switch mobile service provider or cancel my current subscription
18. I would send a message via an App such as Facebook, Viber, WhatsApp
19. I would make a voice or video call via an App such as Facebook, Viber, WhatsApp
20. Other (please specify)

**SCRIPTER:** ASK ALL CODE 1 Q40**BASE:** ALL OWNERS OF HOME PHONE LINE

Now imagine if your fixed line home phone operator increased the per minute cost of making calls to a mobile phone on a particular mobile network.

Q.115 If the increase of calling a mobile phone on one particular network from your fixed line home phone was increased by 1 cent per minute, do you believe that you notice the price increase?

1. YES
2. NO

**SCRIPTER:** ASK ALL CODE 1 Q110**BASE:** ALL NOTICING PRICE INCREASE

Q.116 As a consequence of this 1 cent per minute increase, do you believe that you would change your behaviour when considering making a call from your home phone line to people on this particular mobile operator's network?

1. YES
2. NO

**INTERVIEWER:** SHOWCARD 21

**SCRIPTER:** MULTI CODE. ASK ALL CODE 1 Q116.

**BASE:** ALL CHANGING BEHAVIOUR DUE TO PRICE INCREASE

Q.117 In what ways would you change your behaviour when calling from you home phone line? (Please select up to a maximum of two)

1. I would reduce the number of calls I make to people on this particular mobile network
2. I would reduce the length of the calls I make to people on this particular mobile network
3. I would delay making a call to people on this particular mobile network to a time when it's cheaper to call (for instance in the evening or at the weekend)
4. I would use a voice based app instead of using my home phone line
5. I would not call mobile phones on this particular mobile network
6. Other (please specify)\_\_\_\_\_ [CAPTURE]

**SCRIPTER:** SINGLE CODE FOR EACH SELECTED IN Q117

**BASE:** ALL CHANGING BEHAVIOUR DUE TO PRICE INCREASE

Q.118 How often would you [INSERT EACH STATEMENT SELECTED IN Q117]

1. Never
2. Occasionally - less than a quarter of the time
3. Approximately a quarter of the time
4. Approximately half the time
5. Often - Around three quarters of the time
6. Almost always or always

Q.C13

Do you have you any further comments in relation to this survey?

In order to ensure interviews are carried out in accordance with industry standards Red C are obligated to randomly quality control a certain percentage of the interviews we conduct for our client. Therefore I would really appreciate if you could provide me with your name, telephone number and address for this purpose only and if contacted it would only take a few minutes of your time. Your personal details would remain confidential and not used for any other purpose.

Name:  
 Telephone number:  
 Address:

The survey you completed today was conducted via the market research code of conduct and on behalf of the Communications Regulator who regulates telecommunications services, including voice, broadband and postal services.

Many thanks for your participation in this survey

**INTERVIEWER** PLEASE NOW CODE SOCIAL CLASS BEFORE EXITING SYSTEM

**THANK  
YOU**

**REDC**



# ComReg Business MVCT Market Research

September 2016 - 165716



**REDC**

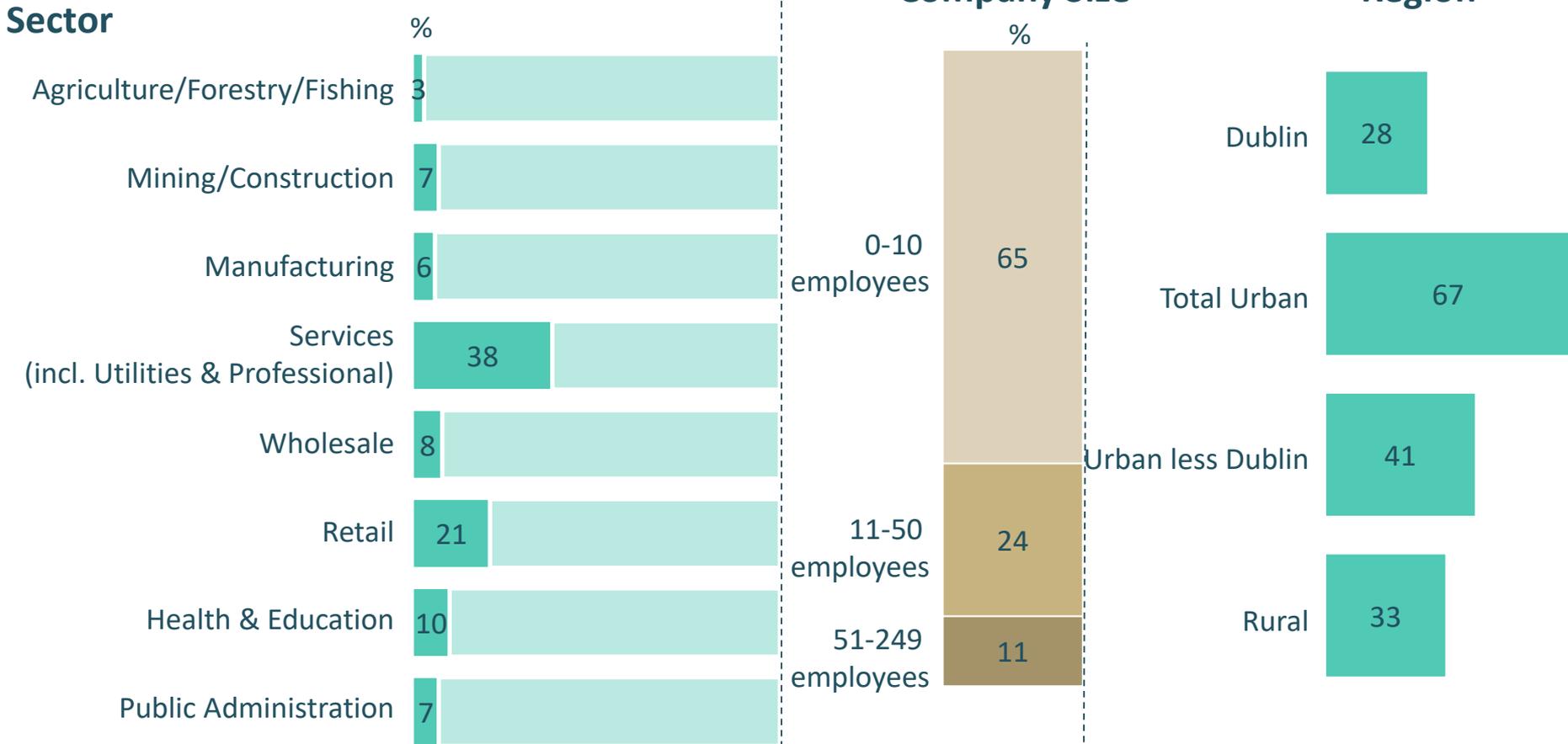
# Objectives & Methodology



- / ComReg is required to review certain electronic communications markets that are susceptible to ex-ante regulation, as set out by the European Commission ('EC'). The Mobile Voice Call Termination ('MVCT') Market is one of five wholesale markets that the EC has identified as being susceptible to ex-ante regulation.
  
- / In order to assist with its market review of MVCT, ComReg has engaged RED C to carry out market research in order to gain insights into business characteristics, including:
  - Incidence of ownership and usage of mobile voice telephony amongst small and medium sized businesses (SMEs). These are businesses classified with 0 -250 employees.
  - SME Usage of mobile phone for traditional calls, texts (SMS) and emails
  - SME Usage of Applications ('Apps') for voice/messaging
  - SME Usage of Voice-over-IP ('VOIP')
  - Incidence of bundling telecommunications services amongst SMEs
  - Price awareness of voice calls and switching behaviour of SMEs
  
- / 500 telephone interviews were conducted by RED C amongst a representative sample of Irish SME'S (0-250 Employees) in August 2016.
  
- / Interviews were quota controlled by industry sector and employee size and weighted by these variables to produce a representative sample of SME's.

# Sample Profile

(Base: All SMEs- 500)



Sample is representative of all SME's in Ireland by sector and company size

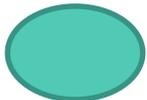


# Contents

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Statistical Testing has been conducted in the survey where a significant difference exists at the 95% confidence interval the following notation is used



REDC



## Key Findings

# Key Findings – Market Analysis MVCT Business 2016



- / 96% of SME's providing employees with mobile phones in the survey are on a bill pay contract.
- / 93% of SME's in the survey use one mobile operator for their mobile phone service. Vodafone is the main provider for 52% of the businesses we spoke to in the survey.
- / According to this survey, 51% of employees use OTT services from voice/video apps from their Smartphone while 44% use instant messaging.
- / 69% of SME's surveyed on a bill pay contract are on a company wide plan.
- / Majority of bill pay businesses offered unlimited calls to mobile within the same network (78%) and outside mobile network (59%) as well as unlimited calls to fixed lines (54%). Regarding data allowance 59% of employees with bill pay subscription do have a limited data allowance within plan.
- / Of all SME's surveyed 94% do not know the cost per call made outside package allowance. 65% of SME's surveyed check bills and 28% have a policy governing how employees can use their mobile phone.
- / 89% of business who provide mobile phones to employees also have a fixed line service. 54% have more than one phone line. eir is the provider for the majority of those with a fixed line voice service in the survey (47%).
- / 90% of SME's state there has been no change in the cost of calling mobile phones from fixed lines in the past 12 months.

# Key Findings – Market Analysis FVCT Consumer 2016



- / 69% of SMEs surveyed have been with their current operator for 3 years or more while 46% of SME's surveyed said they have previously switched provider.
- / 21% of SME's surveyed have previously switched mobile phone plan.
- / 79% of SME's surveyed are never aware of the network they are calling when calling from their business mobile phone.
- / According to this survey, 80% of SEMs don't think about the cost of the call when making a call from their business mobile phone.
- / When aware that a caller is on another network only 5% of SME's surveyed don't answer the call, 7% don't answer but will call the person back, 9% don't answer but will text back and 18% answer but shorten the length of the call

# Mobile Phone Market - I

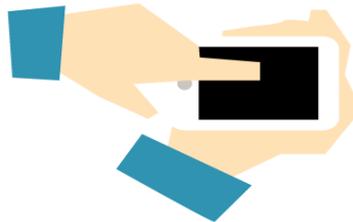
96%

of SME's using mobile phones in this survey are on Bill Pay  
(Ref: Slide 21)



82%

of businesses surveyed provide Smartphones to at least some of their employees  
(Ref: Slide 19)



93%

Of SME's who provide mobile phones to Employees use one mobile provider for all their business mobile phones  
(Ref: Slide 23)



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# OTT Service Usage - I

# 51%



of the SMEs surveyed that provide a smartphone use internet based apps for voice/video calls daily... (Ref: Slide 25)



# ...33%

Of surveyed OTT users use What's App for a voice/video call. (Ref: Slide 25)

# ...24% use..



# ...23% use..



# 44%

Of SMEs using smartphones in the sample use internet based apps for instant message (Ref: Slide 34)



# 44%

of SMEs likely to use OTT services to make calls and send messages in the future (Ref: Slide 34)

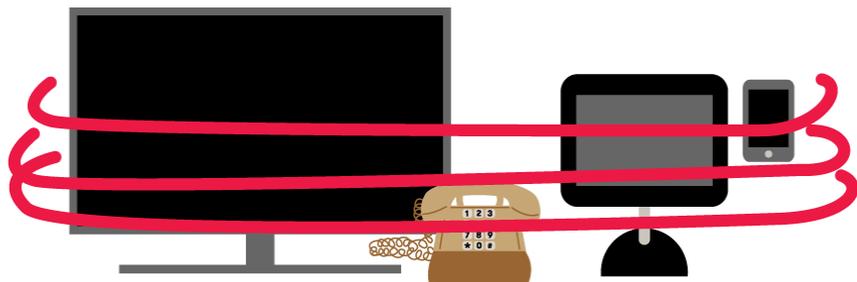


# REDC

# Mobile Phone Market

32%

of surveyed SME's have their mobile phone service bundled with another service  
(Ref: Slide 27)



52%

of mobile users in this survey purchase mobile services from Vodafone  
(Ref: Slide 24)



69%

of surveyed SME's (Bill Pay) have a mobile number paid for by the business and are on the same company plan  
(Ref: Slide 38)



REDC

69%

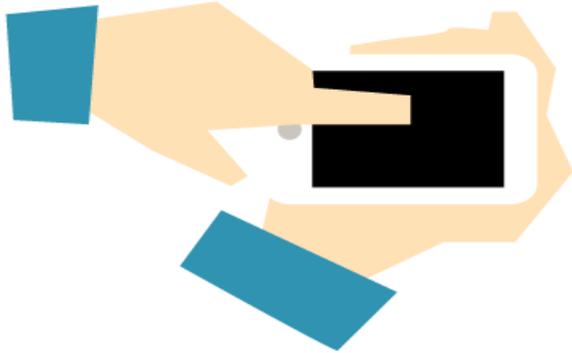
of those that took part in this survey have remained with their current mobile provider for 3 years or more  
(Ref: Slide 88)



# Unlimited v Limited Minutes

78%

of surveyed SME's with bill pay mobiles have unlimited minutes of calls to other mobiles on the same network.  
(Ref: Slide 46)



9%

Are limited in the number of minutes allowed to call other mobile within the same network.  
(Ref: Slide 46)

59%

of bill pay SMEs have unlimited minutes of calls to any mobile network  
(Ref: Slide 48)



15%

Are limited in the number of minutes allowed to call other mobiles within a different network  
(Ref: Slide 48)

54%

of surveyed SME's (Bill Pay) have unlimited minutes of calls to fixed line phones (Ref: Slide 51) and 57% of these unlimited calls are shared between all employees in the business (Ref: Slide 53)



REDC

# Fixed Line Market



89%

of SME in this survey have a fixed voice service (Ref: Slide 80)

Rising to

96%

among businesses with 51-249 Employees years (Ref: Slide 80)

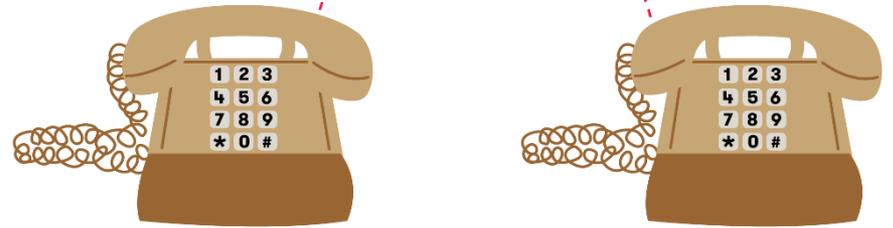
47%

of SME's surveyed purchase a fixed voice service from eir (Ref: Slide 84)



72%

Proportion of calls made from fixed lines to other fixed lines amongst fixed line owners in this survey (Ref: Slide 86)



35%

of those in the survey with a fixed line phone say they have a fixed line package that includes a set number of minutes to make calls to mobile phones at no extra cost (Ref: Slide 85)



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## SSNIP Section

# 16%

Of business surveyed claimed they would definitely/maybe change behaviour given a 1 cent increase in cost of calling another mobile network from a business mobile phone, while 84% say they would not.

(Ref: Slide 114)



# 15%

Of business surveyed claimed they would definitely/maybe change behaviour given a 1 cent increase in cost of calling a fixed line number from a business mobile phone (Ref: Slide 117)



# 12%

Of business surveyed claimed they would definitely/maybe change behaviour given a 1 cent increase in cost of calling from a fixed line number to mobile phone number

(Ref: Slide 120)



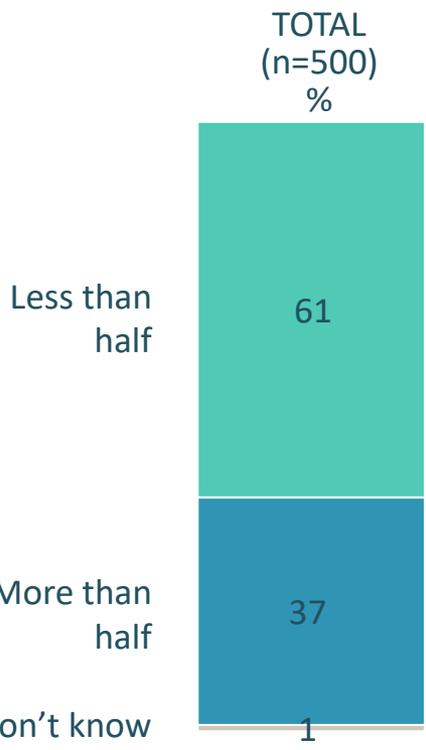


Usage

# Proportion Of Employees With Business Mobile Phones

(Base: All SMEs With Business Mobile Phones, n=500)

Q. What proportion of employees have a mobile phone number provided by the business (as distinct from claiming expenses based on the use of their own personal mobile phone for business purposes)?



	Company Size		
	0 - 10 (314)	11-50 (131)	51-249 (55*)
Less than Half	53%	77%	83%
More than Half	47%	33%	17%
Don't Know	1%	0%	5%

**61% of SMEs surveyed reported to providing less than half of their employees with a business mobile phone.**

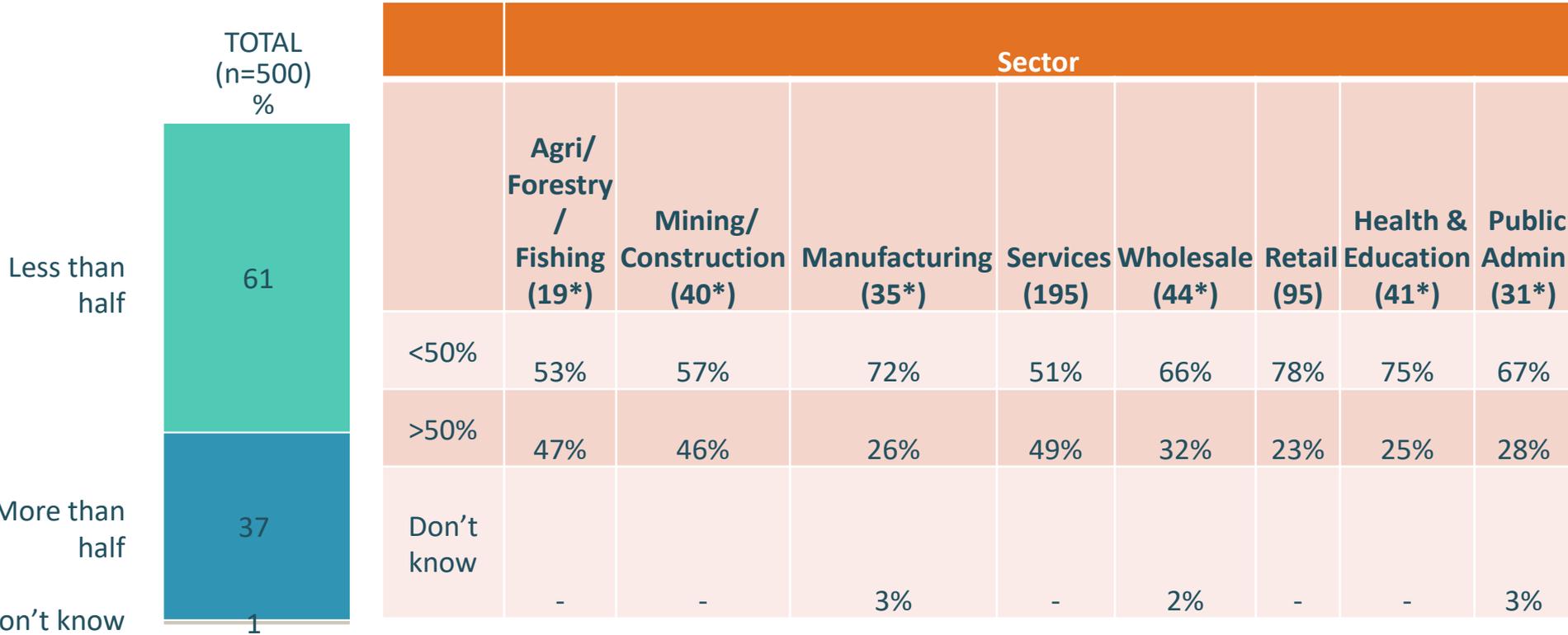
\*Small Base Size



# Proportion Of Employees With Business Mobile Phones

(Base: All SMEs With Business Mobile Phones, n=500)

Q. What proportion of employees have a mobile phone number provided by the business (as distinct from claiming expenses based on the use of their own personal mobile phone for business purposes)?



\*Small Base Size

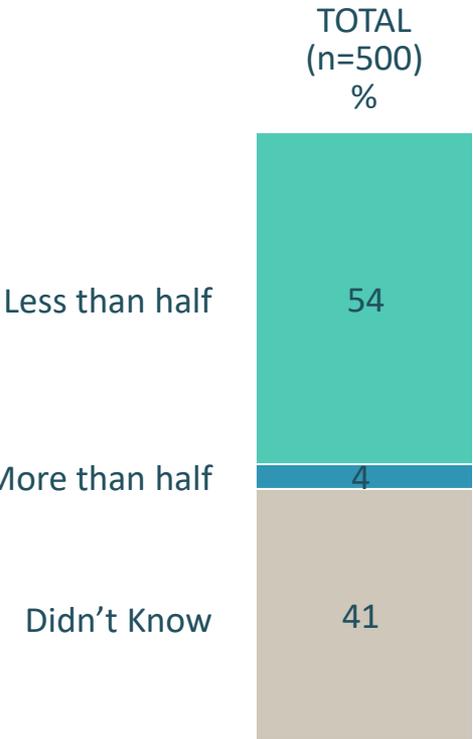


**61% of SMEs surveyed reported to providing less than half of their employees with a business mobile phone.**

# Proportion Of Employees Who Claim Cost Of Personal Mobile Phone Used For Business

(Base: All SMEs With Business Mobile Phones, n=500)

Q. What proportion of employees use their own personal mobile phone for business purposes and claim expenses based on this use?



	Company Size		
	0 - 10 (314)	11-50 (131)	51-249 (55*)
Less than Half	53%	55%	64%
More than Half	6%	1%	1%
Don't Know	41%	44%	35%

\*Small Base Size

\*Small Base Size

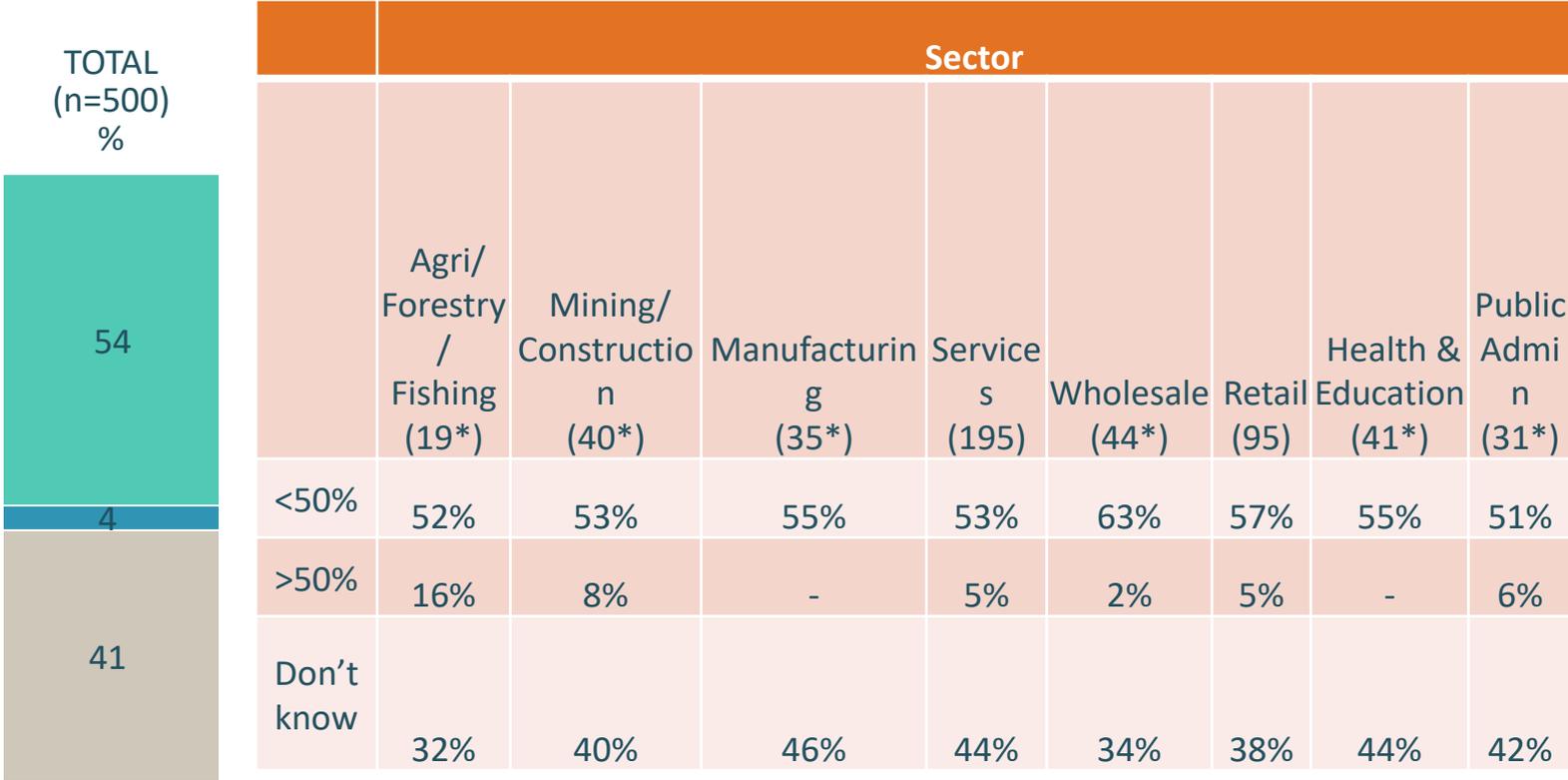
**54% of SMEs surveyed report less than half of employee use their own personal mobile for business purposes and claim expenses. 41% said they don't know.**



# Proportion Of Employees Who Claim Cost Of Personal Mobile Phone Used For Business

(Base: All SMEs With Business Mobile Phones, n=500)

Q. What proportion of employees use their own personal mobile phone for business purposes and claim expenses based on this use?



\*Small Base Size

\*Small Base Size

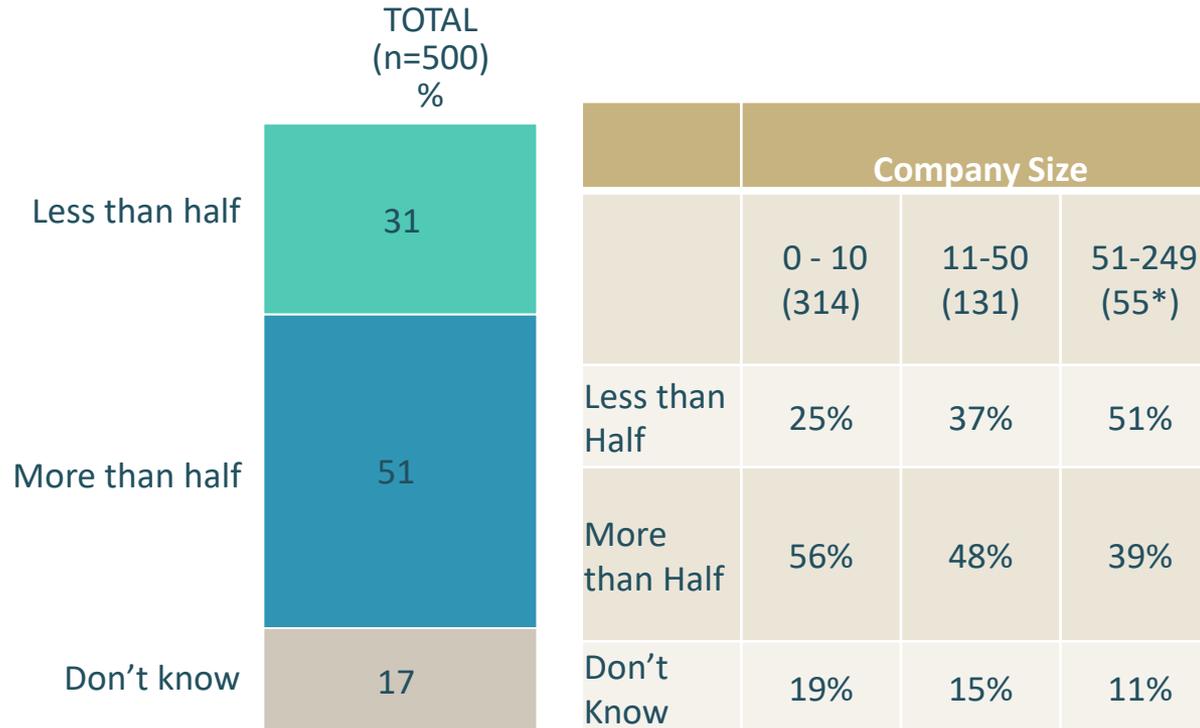
**54% of SMEs surveyed report less than half of Employee use their own personal mobile for business purposes and claim expenses. 41% said they don't know.**



# Proportion Of Employees With Business Supplied Smartphones

(Base: All SMEs With Business Mobile Phones, n=500)

Q. What proportion of employees are supplied with a smart phone provided by the business?



\*Small Base Size

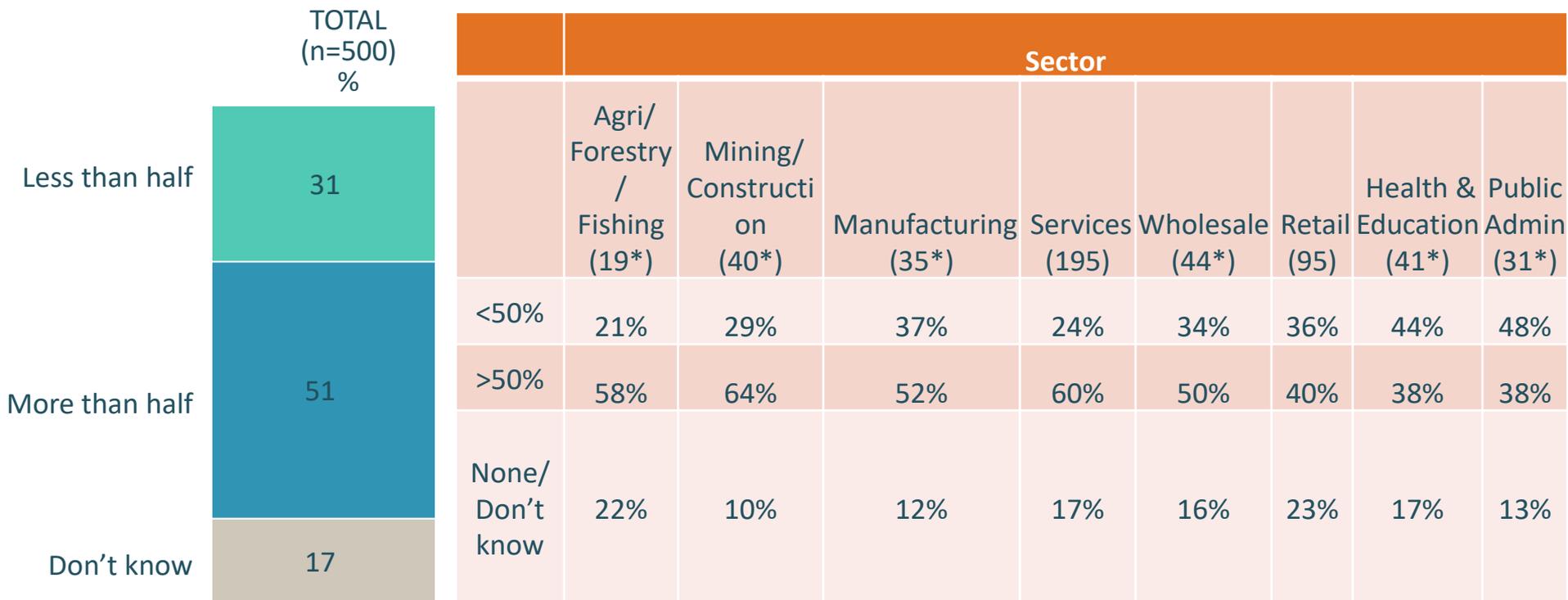
**51% of SMEs with business mobile phones report that more than half of their employees are supplied with a business provided smart phone.**



# Proportion Of Employees With Business Supplied Smartphones

(Base: All SMEs With Business Mobile Phones, n=500)

Q. What proportion of employees are supplied with a smart phone provided by the business?



\*Small Base Size

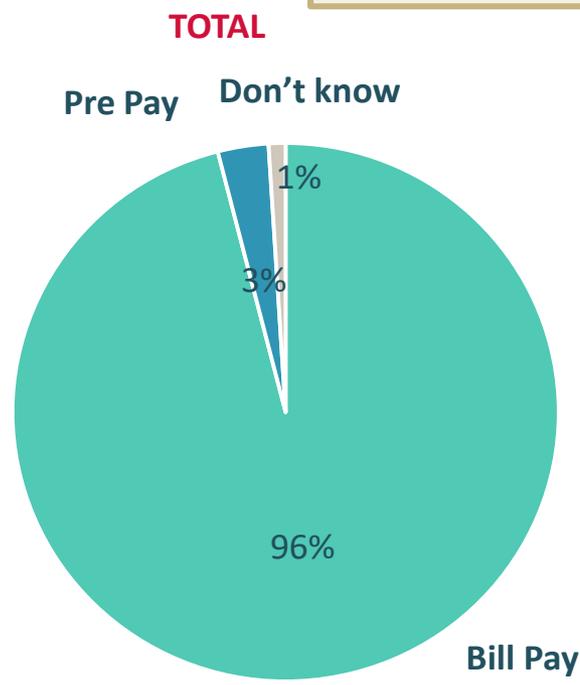
**51% of SMEs with business mobile phones report that more than half of their employees are supplied with a business provided smart phone.**



# Pre-pay Vs Bill Pay Packages

(Base: All SMEs With Business Mobile Phones; n=500)

Q. What percentage of the phones provided by the business to employees are on prepay/bill pay packages?



	Company Size		
	0-10 (314)	11-50 (131)	51-249 (55*)
Bill Pay	96%	97%	99%
Pre Pay	3%	2%	1%
Don't know	1%	1%	-

\*Note: Small Base Size

Of the SMEs surveyed 96% have business mobile phones on a bill pay package.



# Pre-pay Vs Bill Pay Packages

(Base: All SMEs With Business Mobile Phones; n=500)

Q. What percentage of the phones provided by the business to employees are on prepay/bill pay packages?



	Sector							
	Agri/ Forestry/ Fishing (19*)	Mining/ Construction (40*)	Manufacturing (35*)	Services (195)	Wholesale (44*)	Retail (95)	Health & Education (41*)	Public Admin (31*)
Bill Pay	97%	98%	100%	95%	99%	94%	97%	97%
Pre Pay	3%	2%	-	4%	1%	6%	1%	3%
Don't know	-	-	-	1%	-	-	2%	-

\*Note: Small Base Size

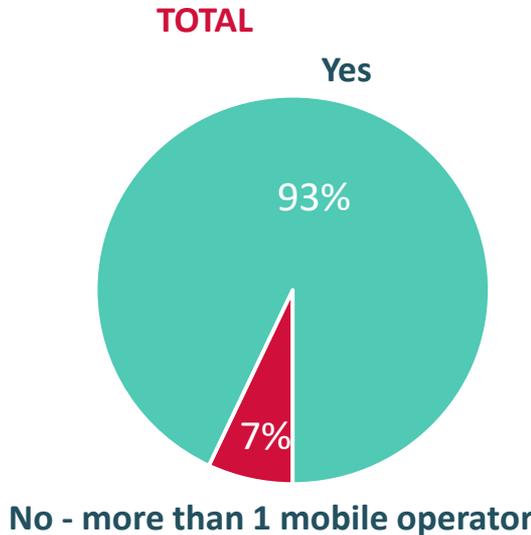
Of the SMEs surveyed 96% have business mobile phones on a bill pay package.



# Number Of Mobile Operators Used

(Base: All SMEs With Business Mobile Phones; n=500)

Q. Do you use a single mobile operator for all of the mobile phone numbers provided by the business to employees



	Company Size		
	0-10 (314)	11-50 (131)	51-249 (55*)
Yes	94%	92%	89%
No - more than 1 mobile operator	6%	8%	11%

\*Note: Small Base Size

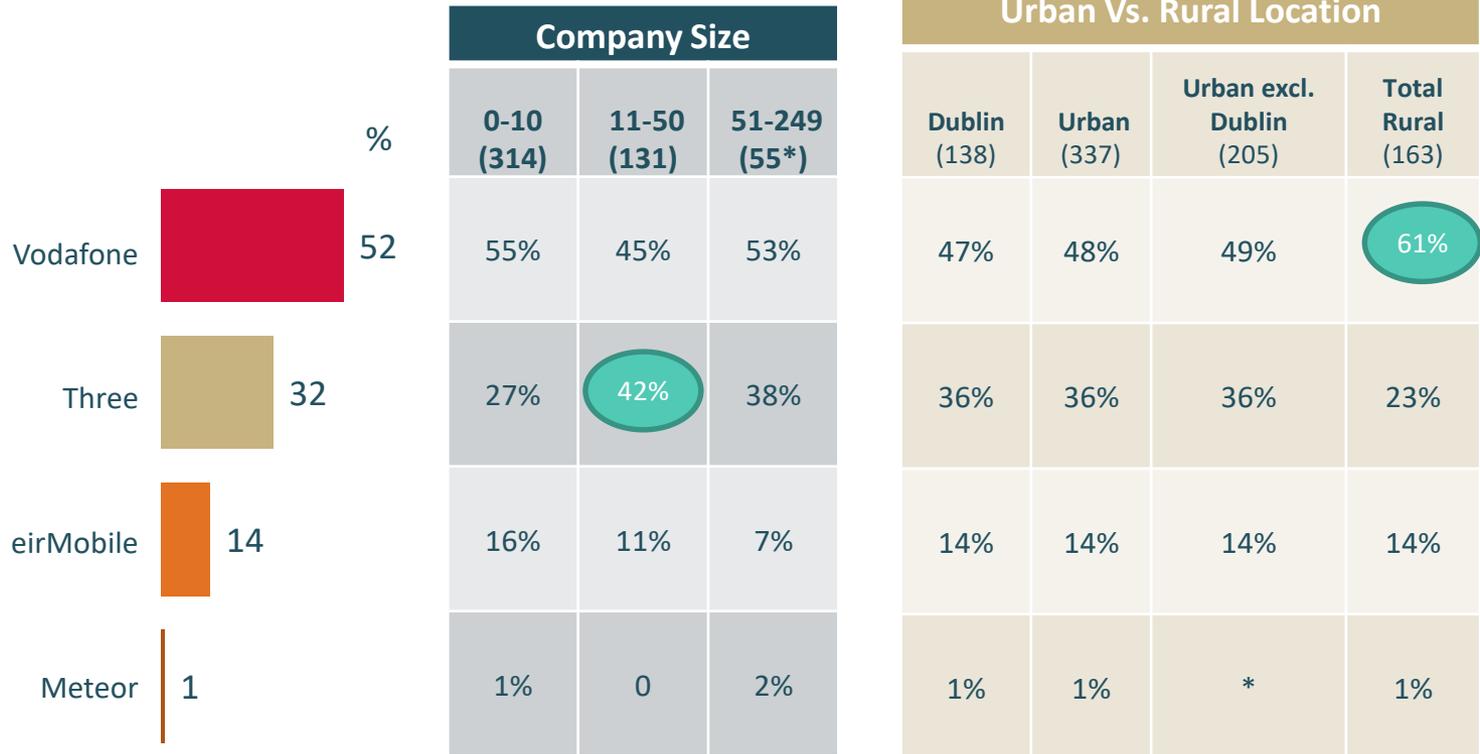
**93% of the SMEs surveyed report using a single mobile operator for all the mobile phones provided by the business to employees.**



# Main Mobile Operator (only one provider can be selected)

(Base: All SMEs With Business Mobile Phones; n=500)

Q. Which of the following is your Main mobile phone operator?



\*Small Base Size

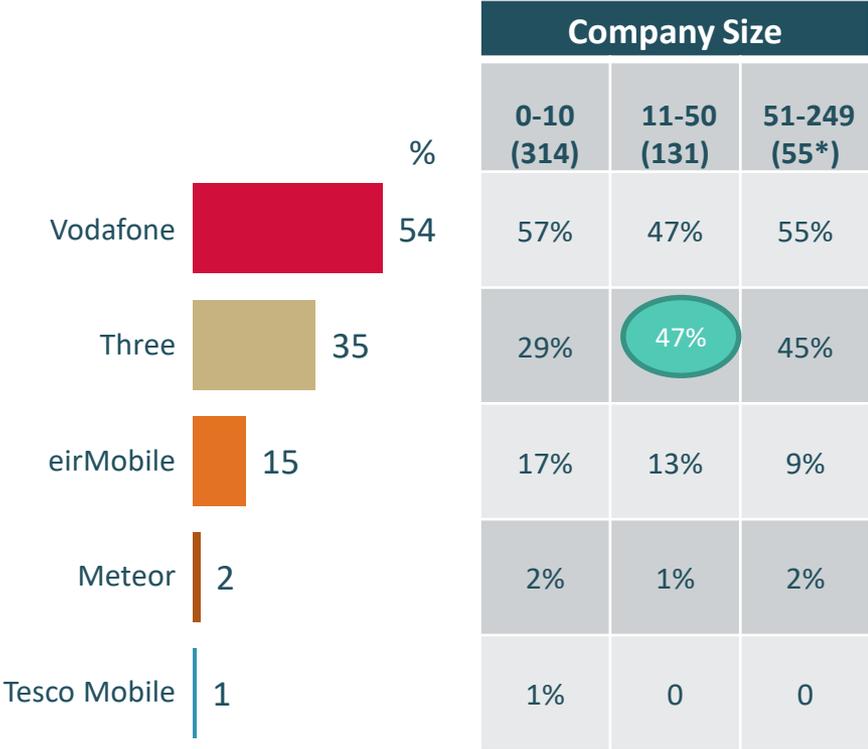
According to this survey, 52% of SMEs have their mobile phone service provided by Vodafone, while 32% are with Three.



# Any Mobile Operator (multiple providers can be selected)

(Base: All SMEs With Business Mobile Phones; n=500)

Q. Which of the following is your mobile phone operator?



Urban Vs. Rural Location			
Dublin (138)	Urban (337)	Urban excl. Dublin (205)	Total Rural (163)
49%	50%	51%	63%
38%	39%	39%	28%
14%	14%	15%	17%
1%	1%	1%	2%
1%	*	0	1%

\*Small Base Size

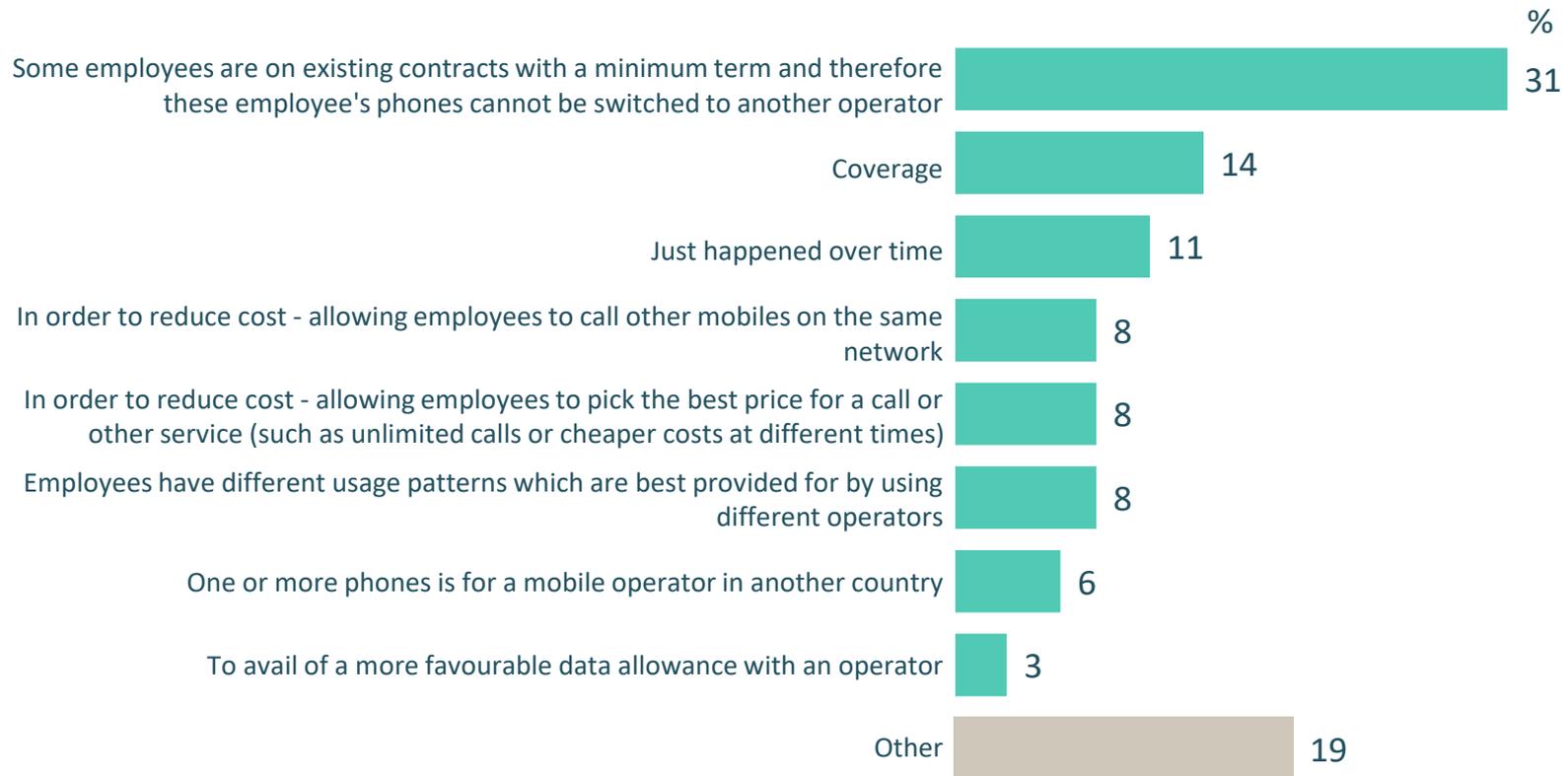
According to this survey, 54% of SMEs have ANY mobile phone service provided by Vodafone, while 35% are with Three.



# Reason For Using More Than One Mobile Operator

(Base: All SMEs With More Than One Mobile Operator, n=36\*)

Q. Why do you use more than 1 mobile phone operator?



\*Small Base Size

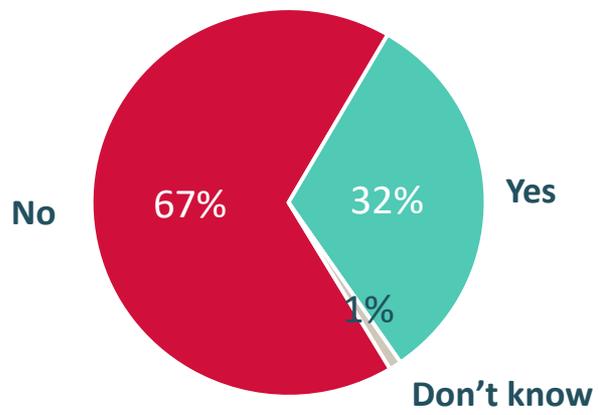
**Of the SMEs surveyed who use more than one mobile operator, 31% say they do so because some employees are on existing contracts with a minimum term, 14% say it is due to coverage and 11% say it just happened over time.**



# Mobile Phone Services Purchased as Part of a Bundle

(Base: All SMEs With Business Mobile Phones; n=500)

Q. Does your business purchase mobile phone telephony as part of a bundle including other telecommunication services (such as fixed line, broadband, etc.) from the same supplier?



	Company Size		
	0-10 (314)	11-50 (131)	51-249 (55*)
Yes	34%	27%	35%
No	65%	71%	65%
Don't know	1%	2%	-

Urban Vs. Rural Location			
Dublin (138)	Urban (337)	Urban ex Dublin (205)	Total Rural (163)
30%	33%	35%	31%
68%	65%	63%	69%
1%	2%	2%	-

\*Small Base Size

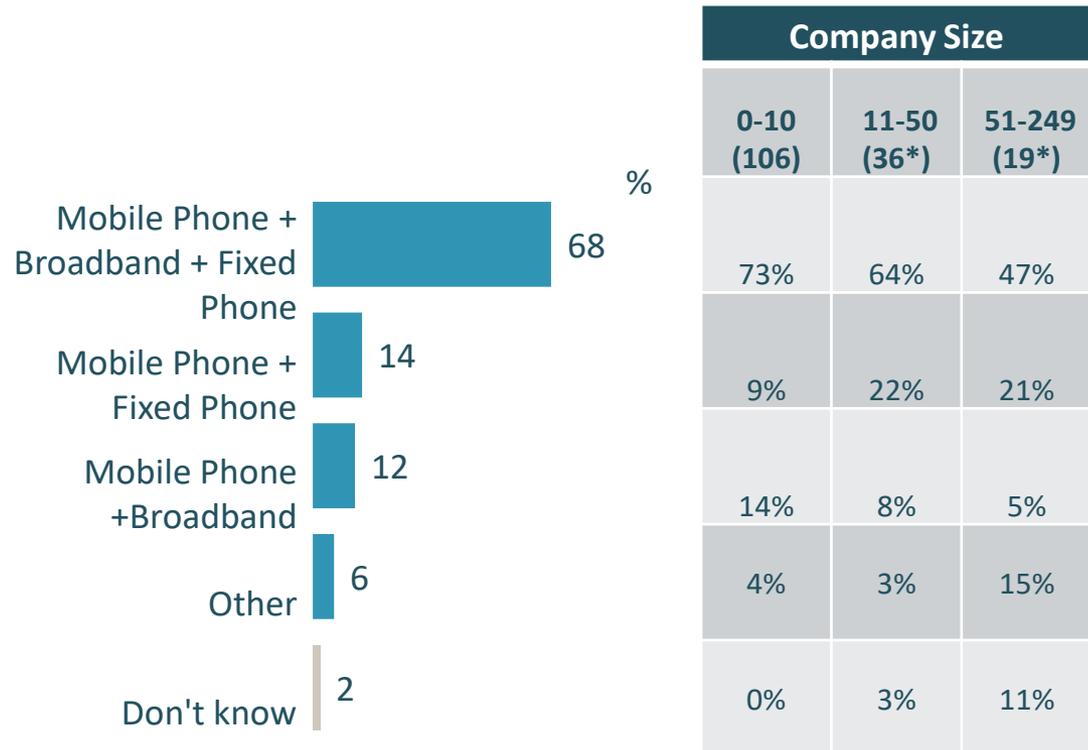
**32% of the SMEs surveyed report purchasing mobile phone services as part of a bundle with their other telecommunication services**



# Bundle Types with Mobile Phone

(Base: All SMEs Purchasing Mobile Services As Part Of A Bundle; n=161)

Q. Apart from mobile phones, what other services are included in the bundle?



Urban Vs. Rural Location			
Dublin (42*)	Urban (111)	Urban ex Dublin (72)	Total Rural (50*)
62%	68%	72%	66%
19%	13%	8%	16%
10%	12%	14%	12%
7%	6%	4%	4%
2%	2%	1%	2%

\*Small Base Size

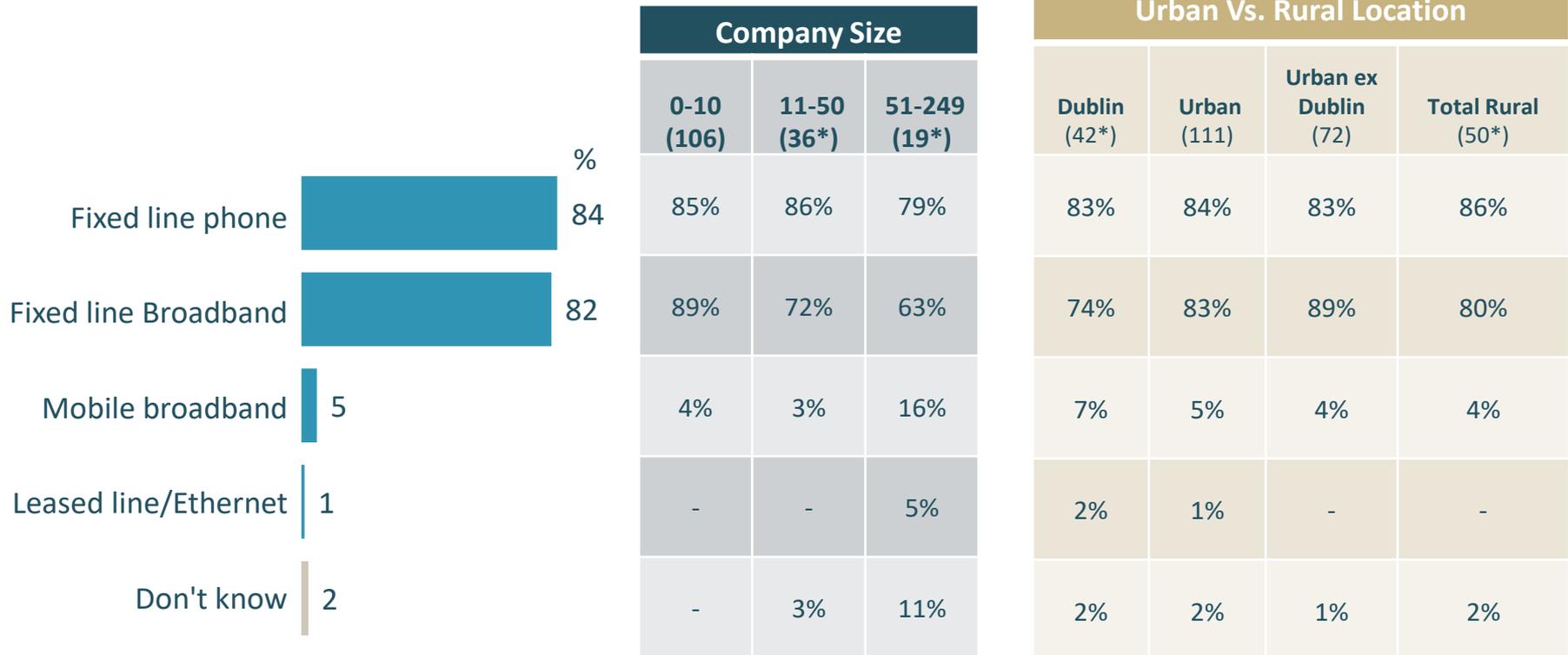
According to this survey, the most popular mobile phone bundle type for SME's to have is mobile phone with fixed broadband and fixed phone.



# Other Elements In The Bundle

(Base: All SMEs Purchasing Mobile Services As Part Of A Bundle; n=161)

Q. Apart from mobile phones, what other services are included in the bundle?



\*Small Base Size

According to this survey, 84% of SMEs purchasing mobile phone service in a bundle also purchase fixed line phone services while 82% also purchase fixed line broadband as part of this bundle.



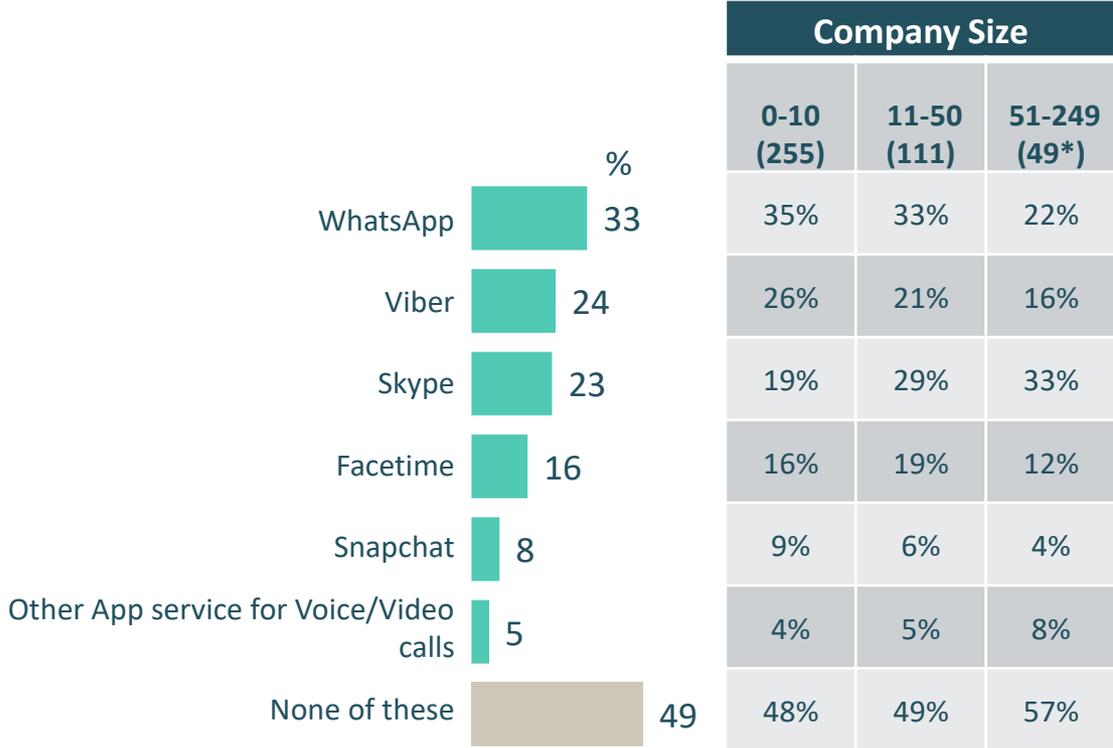


## OTT Voice and Messaging Apps

# Incidence Of Using OTT Voice/Video Apps From Smart Phone

(Base: All SMEs With Smartphones; n=415)

Q. Do any of the employees in the business use any of the following Apps for Voice or Video Calls from their mobile smart phone?



\*Small Base Size

According to telecommunication decision makers in the SMEs surveyed, 51% of SMEs with smartphones say that employees in the business use apps for voice/video calls – 33% use WhatsApp, 24% use Viber and 23% use Skype.

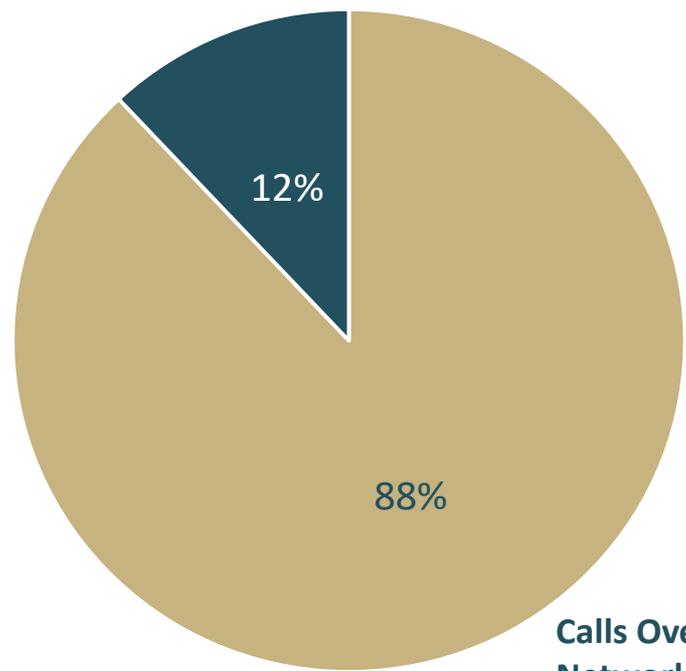


# Percentage Of Calls Made Over Standard Mobile Networks

(Base: All SMEs Using Internet Based Voice/Video Apps, n=210)

Q. Thinking about all of the mobile calls made from business supplied mobile phones, please estimate the percentage of calls made over standard mobile networks and the percentage of calls using app/internet service such as Skype/Viber/WhatsApp? Please estimate if unsure.

Calls over OTT Service



Calls Over Mobile Network

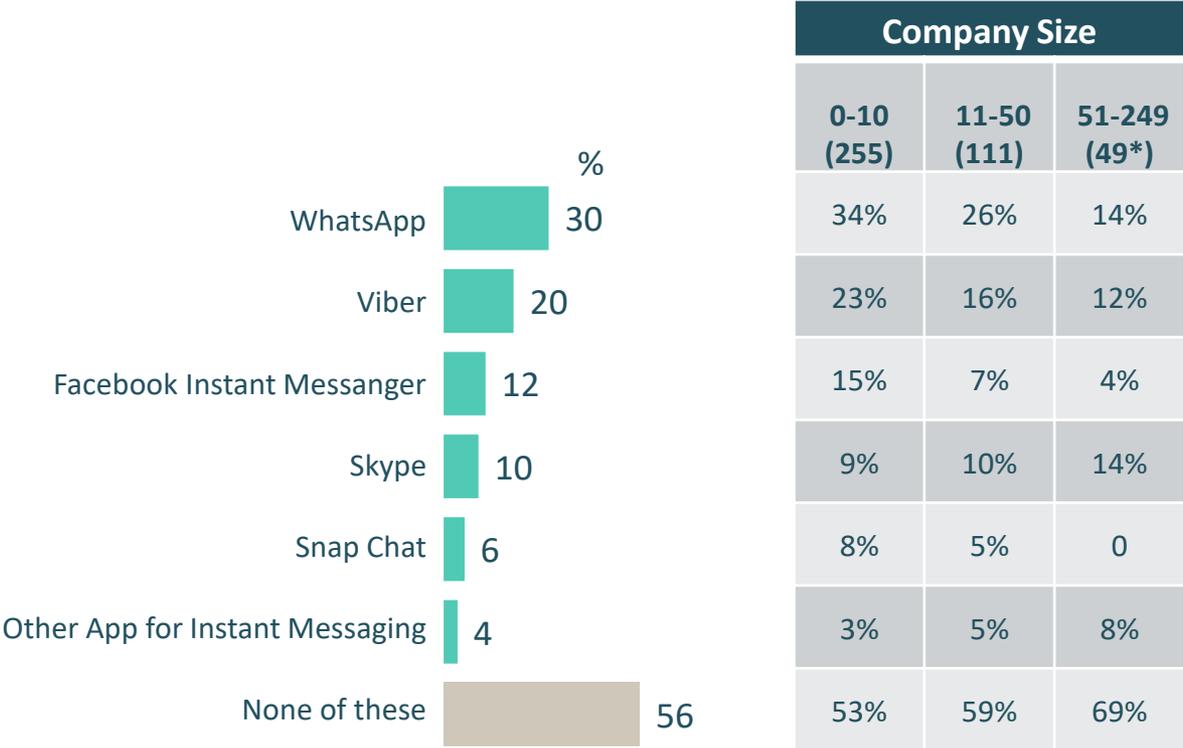
On average, 88% of calls made from business supplied mobile phones are made over mobile network, according to telecommunication decision makers in the SMEs using internet based voice/video apps.



# Incidence Of Using Apps For Instant Messaging: YES %

(Base: All SMEs With Smartphones; n=415)

Q. Do any of the employees in the business use any of the following Apps for instant messaging from their mobile phone for business purposes?



\*Small Base Size

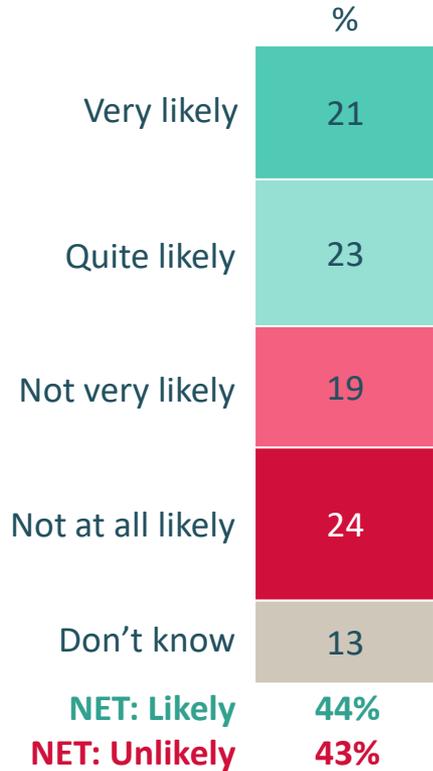
According to telecommunication decision makers 46% of SMEs surveyed with smartphones in this survey say that employees in the business use apps for instant messaging from their phone for business purposes.



# Future Likelihood Of Using Apps To Make Calls And Send Instant Messages

(Base: All SMEs With Smartphones, n=415)

Q. How likely or unlikely are employees in your business to make calls/use instant messaging from their mobile using app/internet services such as Skype/Viber/ WhatsApp in the future?



	Company Size		
	0-10 (255)	11-50 (111)	51-249 (49*)
Very Likely	23%	17%	18%
Quite likely	20%	29%	29%
Not very likely	18%	18%	27%
Not at all likely	27%	22%	14%
Don't know	12%	14%	12%
	<b>43%</b>	<b>46%</b>	<b>47%</b>
	<b>45%</b>	<b>40%</b>	<b>41%</b>

\*Small Base Size

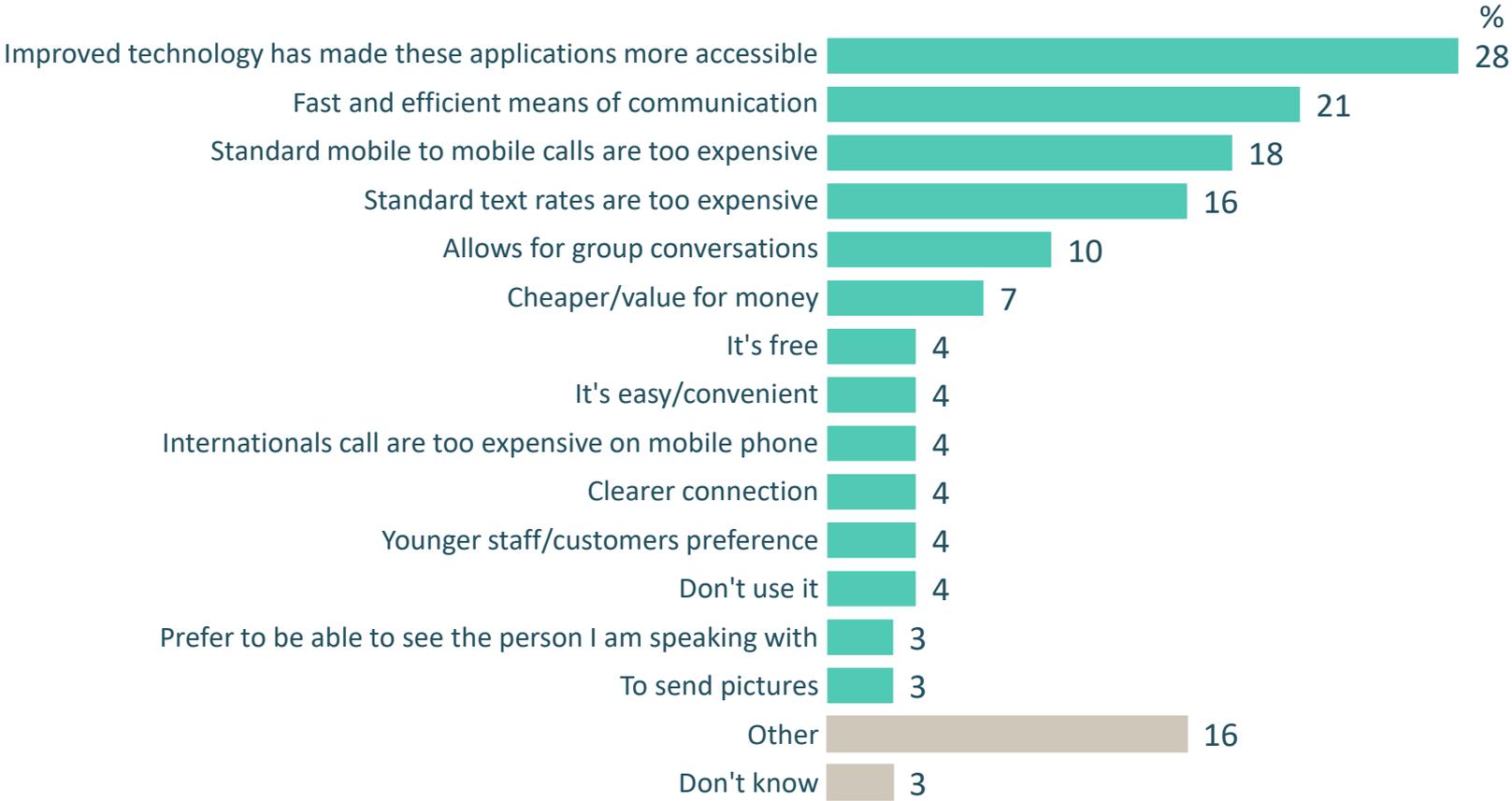
According to telecommunication decision makers surveyed, 44% of SMEs with Smartphones say that employees in their business are likely to use apps for calls/messaging from their mobile in the future, however, 43% say that their employees are unlikely to do this.



# Reason For Increased Likelihood Of Using Apps To Make Calls And Send Instant Messages

(Base: ALL Likely To Use Apps To Make Calls And Send Instant Messages, n=184)

Q. You mentioned the employees of the business are likely to make calls/use instant messaging from their mobile. why do you think this?



Amongst surveyed SMEs with smartphones that said their employees are likely to use apps in the future for calls/messaging, 28% say the reason for this is that technological improvements have made these apps more accessible, 21% say that it is a fast and efficient means of communication.



# Reason Unlikely To Use Apps To Make Calls And Send Instant Messages

(Base: ALL Unlikely To Use Apps To Make Calls And Send Instant Messages, n=179)

Q. You mentioned the employees of the business are unlikely to make calls/use instant messaging from their mobile. Why do you think this?



Amongst SMEs in the survey that say it is unlikely their employees will use apps for calls/messages, 28% claim that the reason for this is that they don't need to.



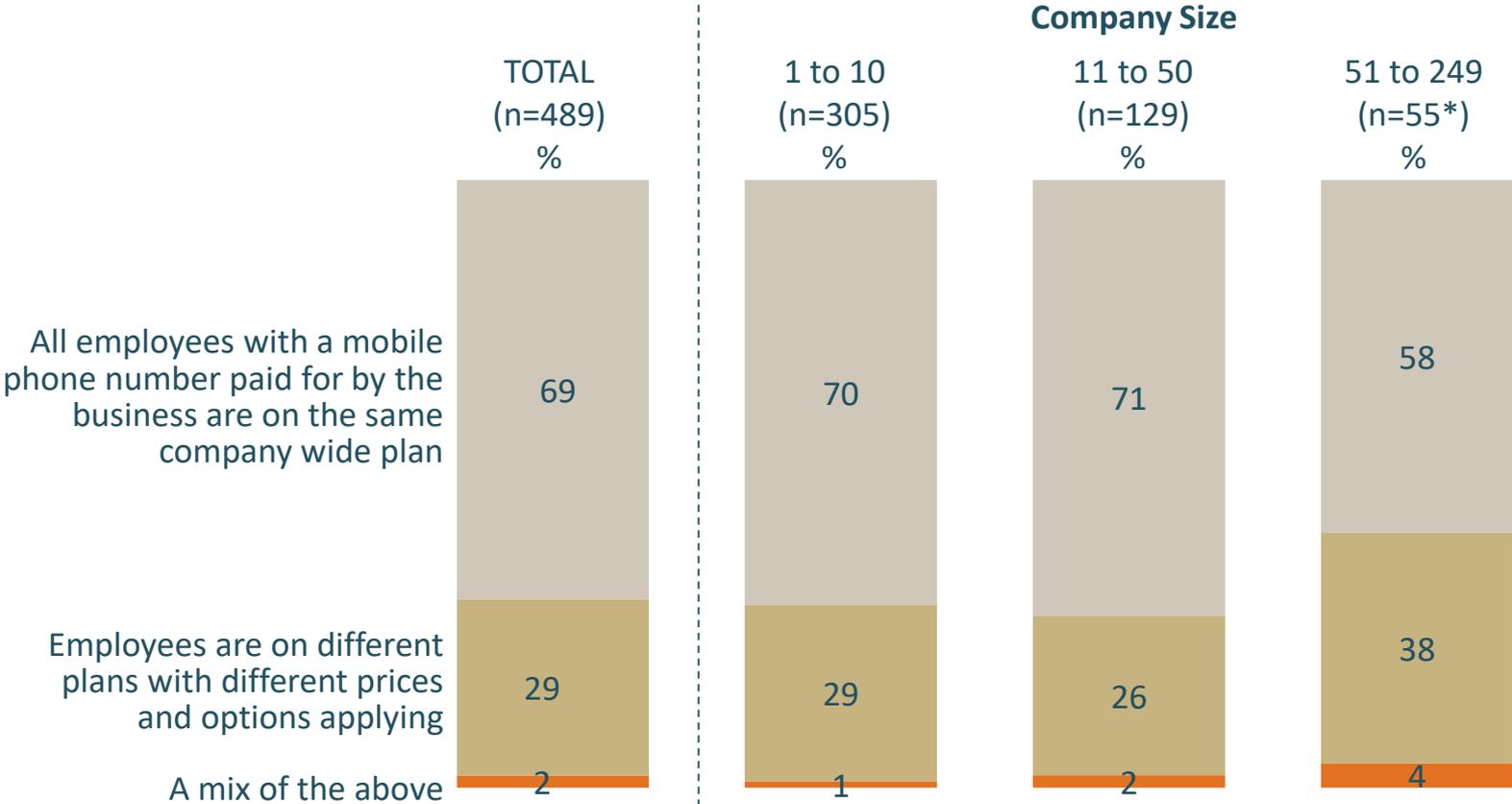


# Bill Pay Mobile Phones

# Does Your Business Have A Shared Company Wide Mobile Plan Or Individual Plans

(Base: All SMEs With Bill Pay Mobile Contracts, n=489)

Q. In your business, are all of employees on a single shared company mobile plan or do you have different mobile plans for different employees?



\*Small Base Size

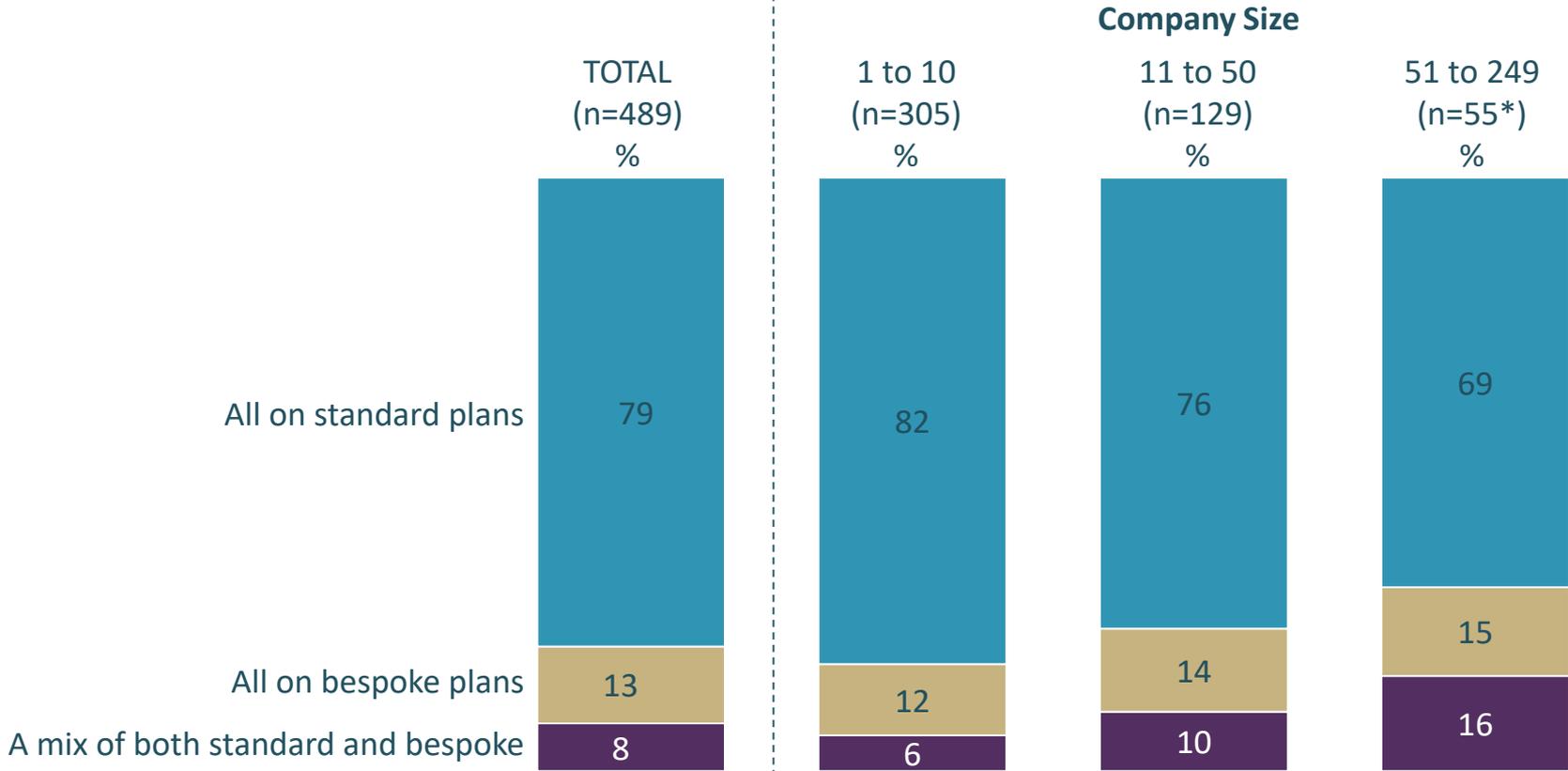
**69% of SMEs in this survey with bill pay mobile contracts share the same company wide plan.**



# Standard Or Bespoke Mobile Plans

(Base: All SMEs With Bill Pay Mobile Contracts, n=489)

Q. Are all employees with mobile phones supplied by your business on standard mobile plans from your operators or are some on bespoke packages designed to match your individual employee needs?



\*Small Base Size

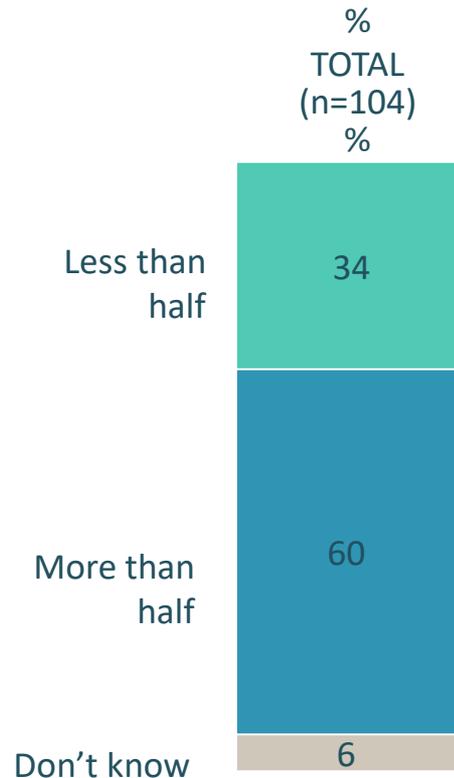
Of the bill pay business surveyed, 79% report using standard mobile phone plans while 13% are on bespoke plans and 8% have a mix of both.



# Proportion Of Employees With Bespoke Packages

(Base: All SMEs With Bill Pay Bespoke Mobile Contracts, n=104)

Q. What percentage of your employees with business supplied mobile phones are on bespoke packages?



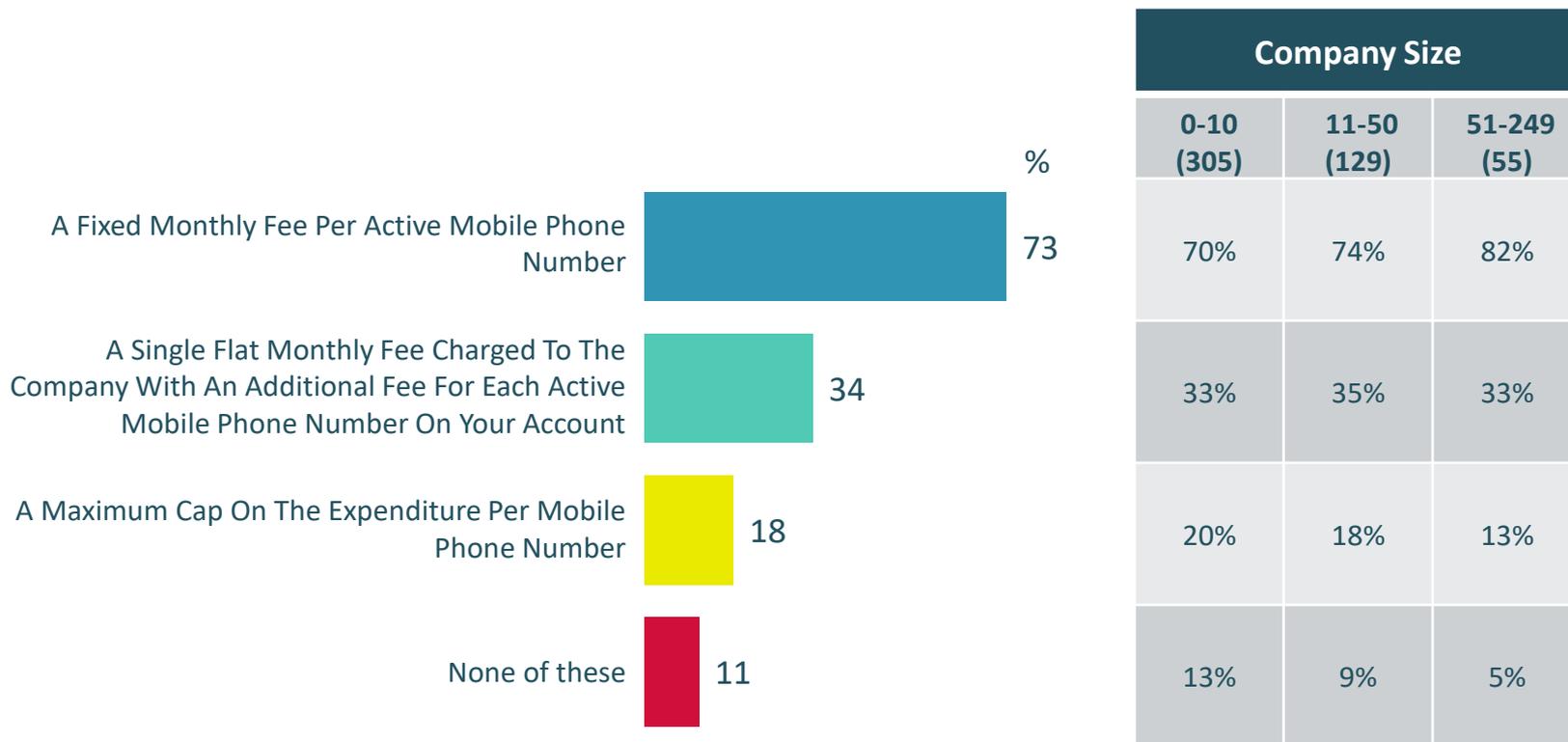
Of Bill Pay SME's with a bespoke mobile contract 34% say less than half of their employees are covered by such a package.



# Features Included In Main Plan/Package

(Base: All SMEs With Bill Pay Mobile Contracts; n=489)

Q. Thinking about the main mobile phone plan/package that your business has, please indicate if each of the following features are included



(Data adds over 100% as multiple responses are possible)

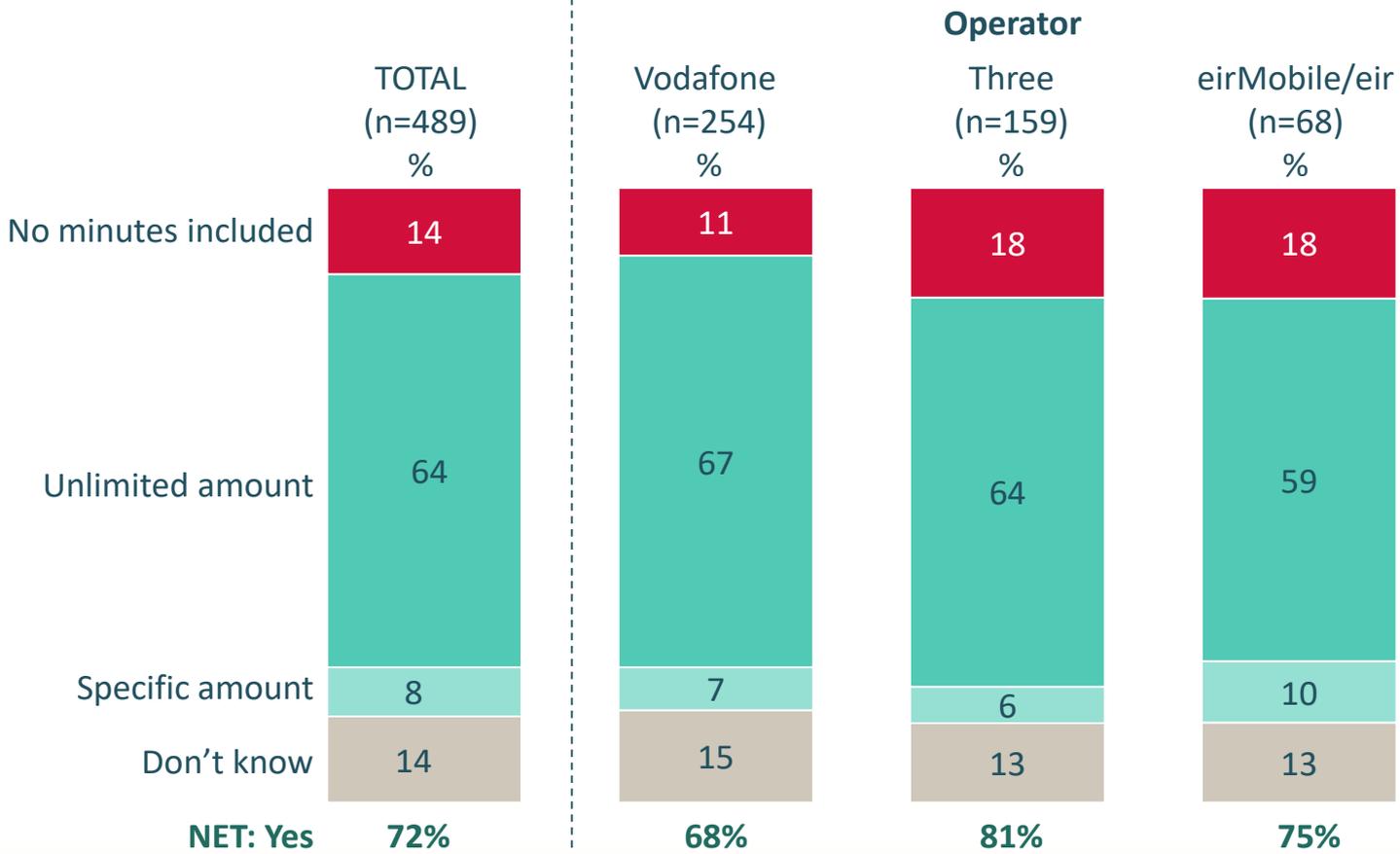
**73% of SMEs with bill pay mobile phones pay a fixed monthly fee for each mobile number, while 34% have a single flat monthly charge with an additional fee for each added mobile number.**



# Inclusive Minutes To Other Employees On The Same Plan/Package

(Base: All SMEs With Bill Pay Mobile Contracts, n=489)

Q. Thinking about the main mobile phone plan/package that your business has, does this package contain inclusive minutes which can be used for calls between mobile phones of employees on that particular plan (i.e. minutes that can be used by employees to call each other)?



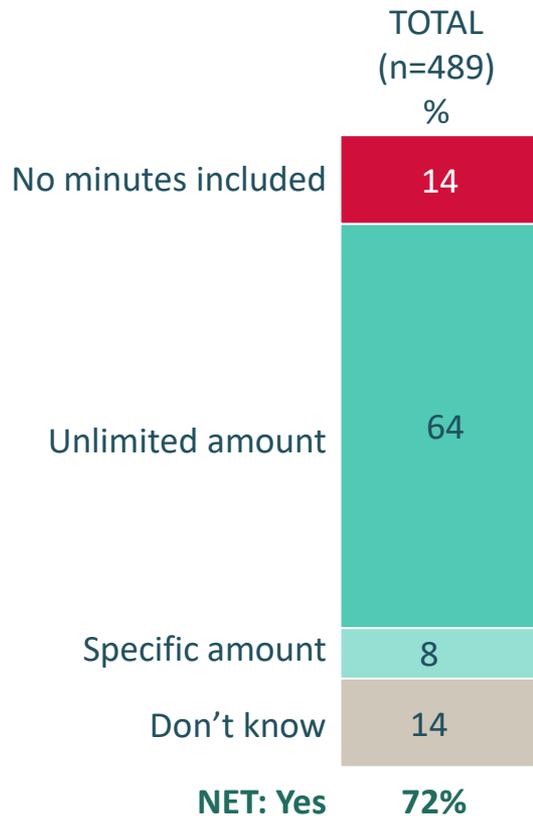
Of the SMEs surveyed, 72% of those with bill pay mobile phones say their plan/package contains unlimited/specific free minutes that can be used by employees to call other employees on the same plan/package.



# Inclusive Minutes To Other Employees On The Same Plan/Package

(Base: All SMEs With Bill Pay Mobile Contracts, n=489)

Q. Thinking about the main mobile phone plan/package that your business has, does this package contain inclusive minutes which can be used for calls between mobile phones of employees on that particular plan (i.e. minutes that can be used by employees to call each other)?



OTT Usage	
OTT Voice Users (208)	OTT Message Users (178)
16%	13%
64%	65%
7%	10%
13%	12%
<b>71%</b>	<b>75%</b>

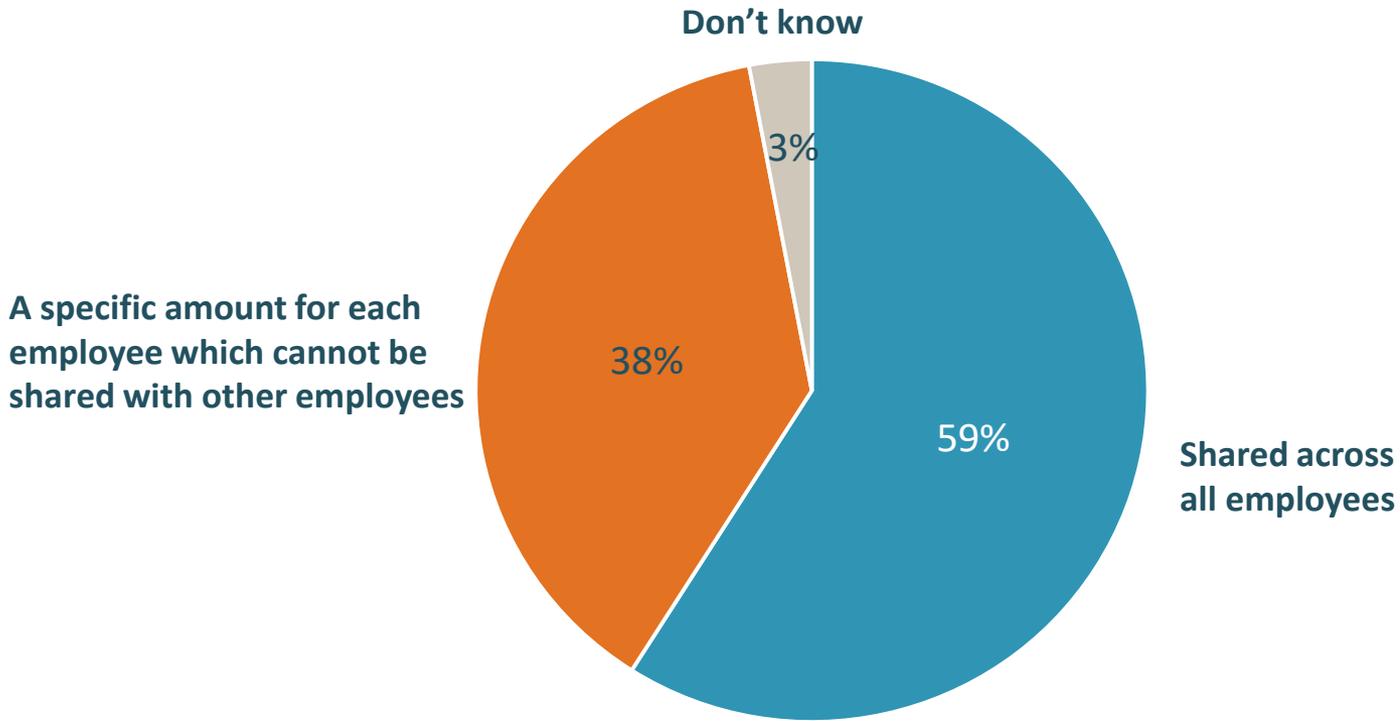
Of the SMEs surveyed, 72% of those with bill pay mobile phones say their plan/package contains unlimited/specific free minutes. This figure is slightly higher among OTT message users



# Inclusive Inside Plan Minutes Shared Between All Employees Or Do Each Have Their Own Amount

(Base: All SMEs With Bill Pay Mobile Contracts With Inclusive Minutes, n=351)

Q. Are the inclusive employee to employee minutes shared between all of the employees on the plan or package or does each employee have their own specific amount of inclusive minutes?



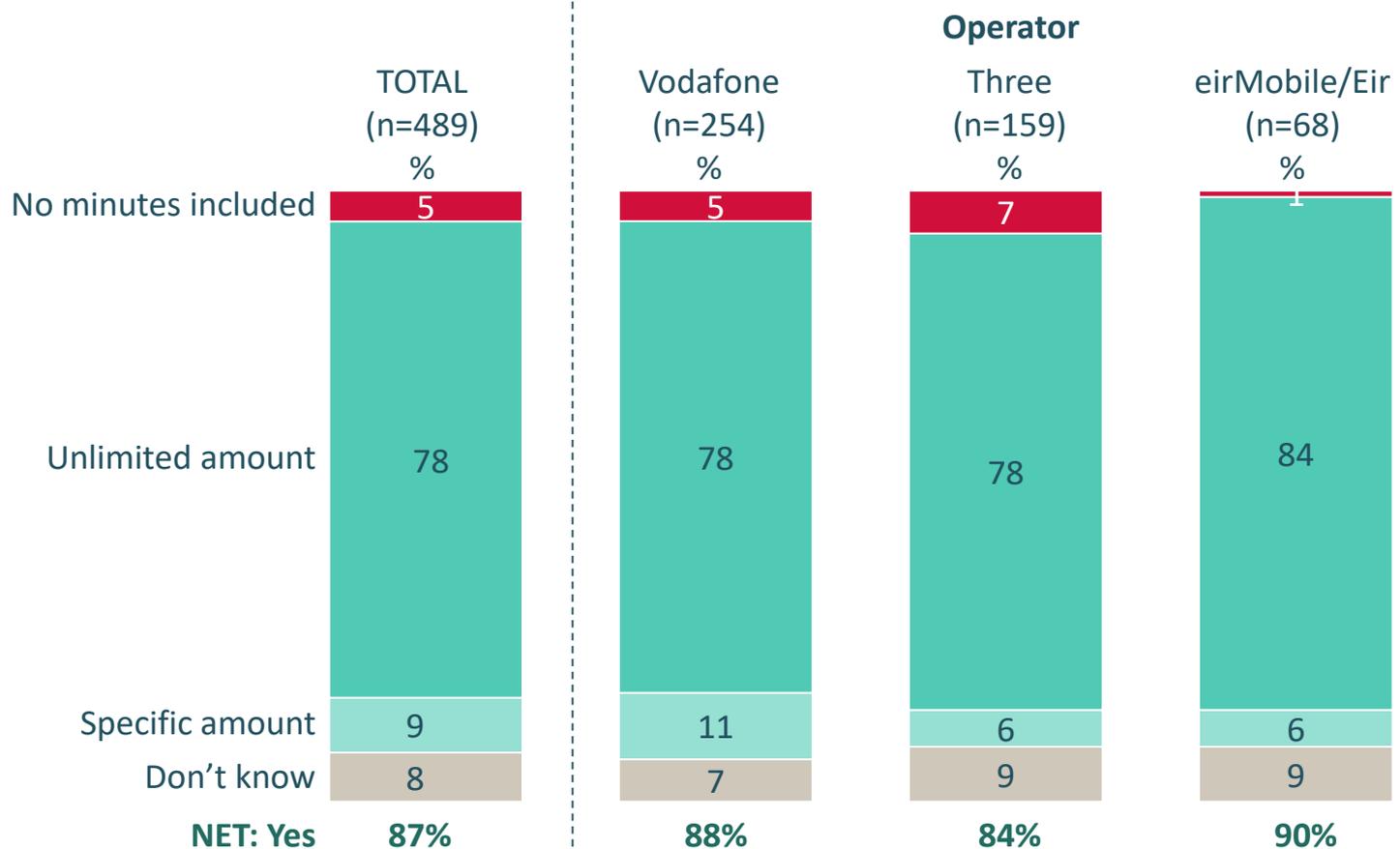
59% of SMEs surveyed with bill pay mobile phones with inclusive minutes share these minutes across all employees on the plan



# Inclusive Minutes To Other Mobiles On The Same Network

(Base: All SMEs With Bill Pay Mobile Contracts, n=489)

Q. Does your package contain inclusive minutes which can be used for calls to any mobile on the same mobile network as you?



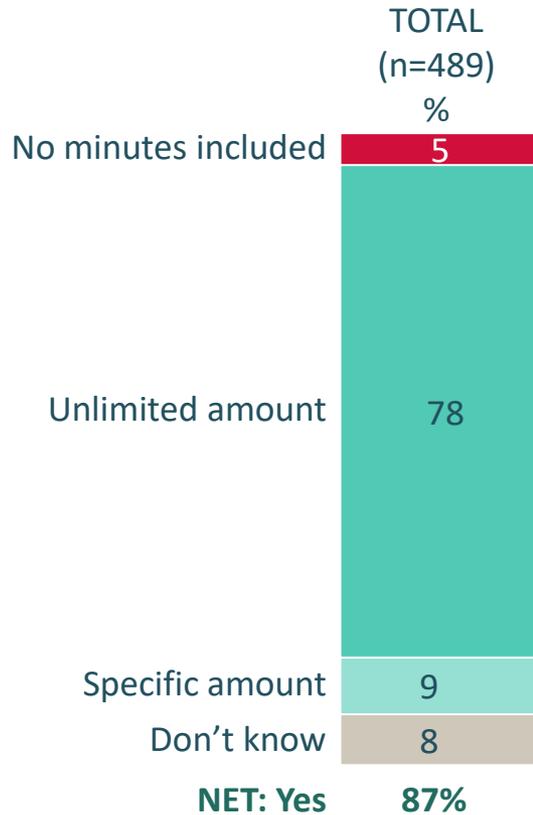
87% of SMEs with bill pay mobile phone contracts in this survey report have unlimited/specific inclusive minutes to call mobile numbers on the same network.



# Inclusive Minutes To Other Mobiles On The Same Network

(Base: All SMEs With Bill Pay Mobile Contracts, n=489)

Q. Does your package contain inclusive minutes which can be used for calls to any mobile on the same mobile network as you?



OTT Usage	
OTT Voice Users (208)	OTT Message Users (178)
4%	3%
79%	81%
10%	10%
7%	6%
<b>89%</b>	<b>91%</b>

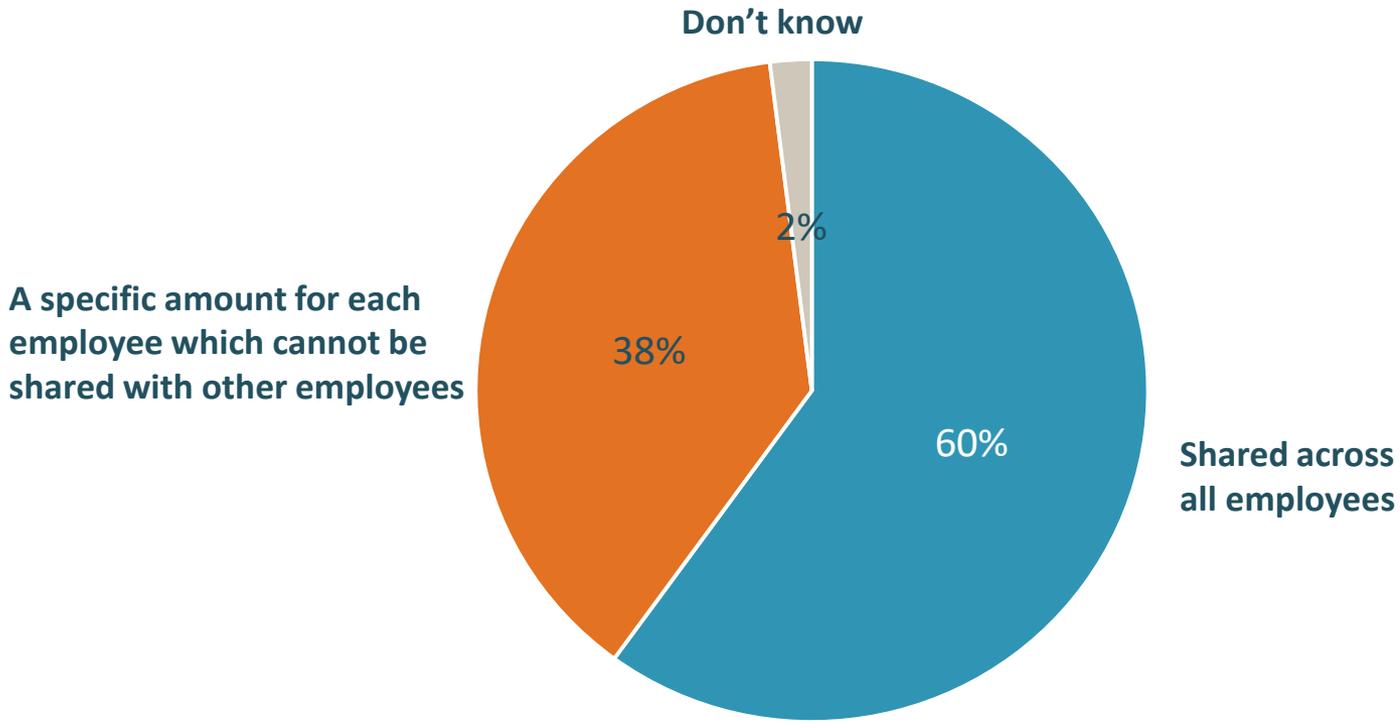
87% of SMEs with bill pay mobile phone contracts in this survey report having unlimited/specific inclusive minutes. This figure is slightly higher among OTT message users.



# Distribution of Inclusive Minutes To Other Mobiles On The Same Network

(Base: All SMEs With Bill Pay Mobile Contracts With Inclusive Same Network Minutes, n=425)

Q. Are the inclusive same network, mobile to mobile minutes shared between all of the employees on the plan or does each employee have their own inclusive minutes?



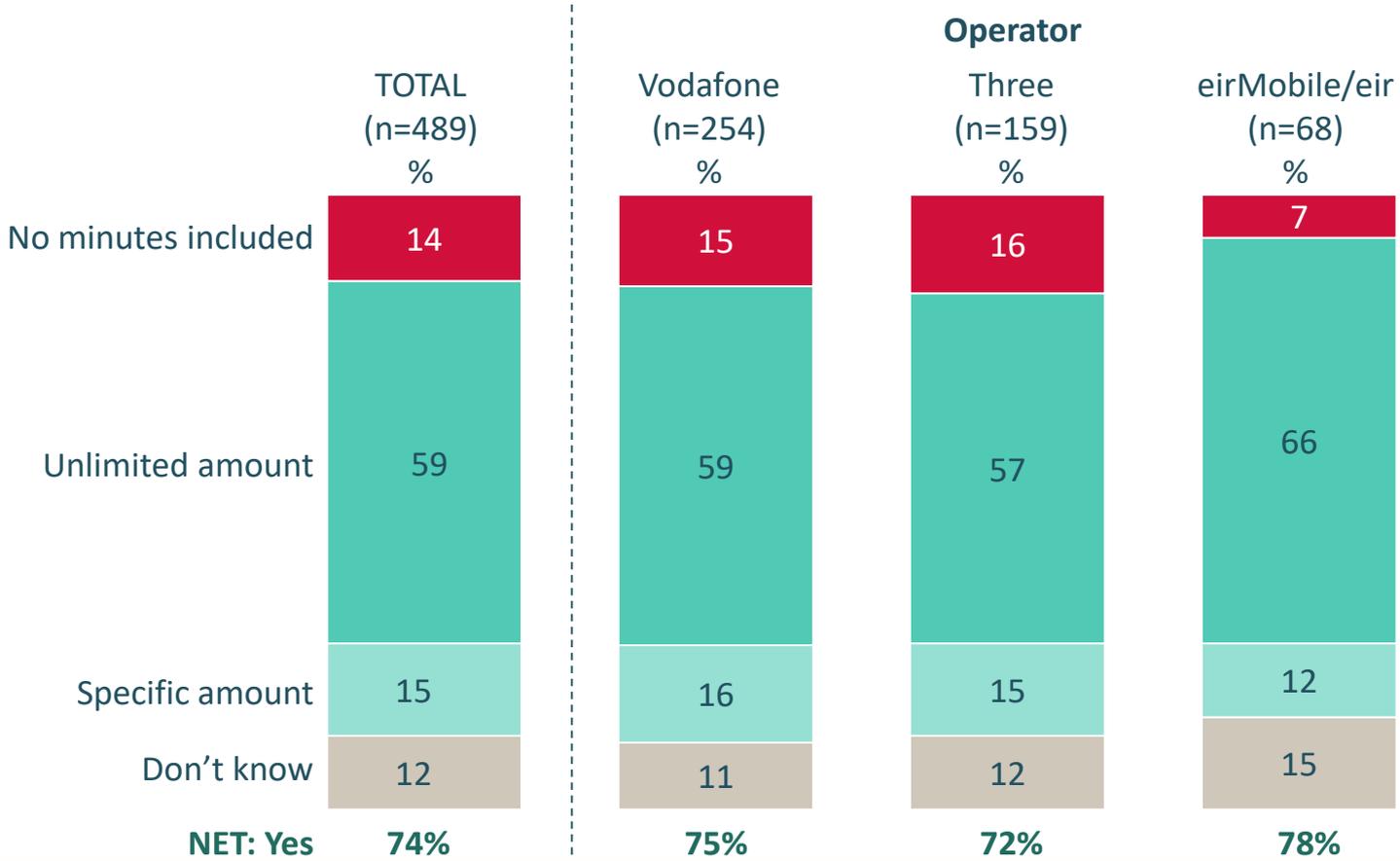
Amongst SMEs with Bill Pay mobile contracts with inclusive same network minutes that took part in this survey, 60% say that these minutes are shared across all employees, while 38% claim that each employee has a specific amount of minutes that cannot be shared.



# Inclusive Minutes To Other Mobiles On Any Network

(Base: All SMEs With Bill Pay Mobile Contracts, n=489)

Q. Does your package contain inclusive minutes that can be used for calls to mobiles on any mobile network?



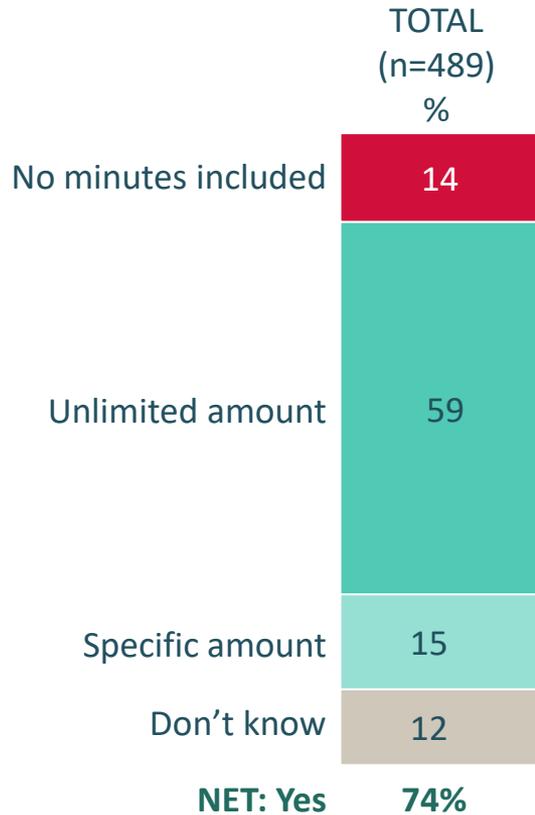
59% of surveyed SMEs with Bill Pay mobile contracts say that their package includes an unlimited amount of inclusive minutes that can be used for calls to mobiles on any network.



# Inclusive Minutes To Other Mobiles On Any Network

(Base: All SMEs With Bill Pay Mobile Contracts, n=489)

Q. Does your package contain inclusive minutes that can be used for calls to mobiles on any mobile network?



OTT Usage	
OTT Voice Users (208)	OTT Message Users (178)
16%	12%
56%	61%
17%	18%
11%	9%
<b>73%</b>	<b>79%</b>

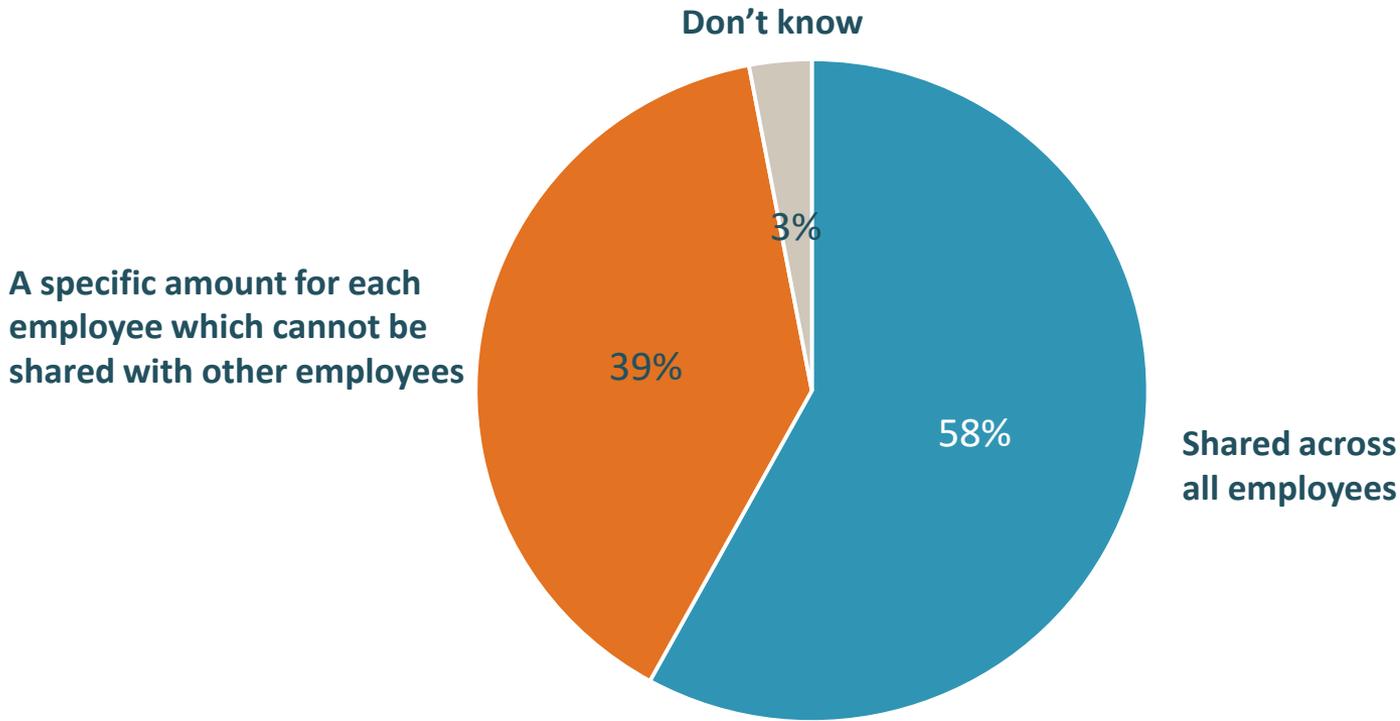
59% of surveyed SMEs with Bill Pay mobile contracts say that their package includes an unlimited amount of inclusive minutes. This figure is slightly higher among OTT message users.



# Inclusive Any Network Minutes Shared Between All Employees Or Do Each Have Their Own Amount

(Base: All SMEs With Bill Pay Mobile Contracts With Inclusive Any Network Minutes, n=363)

Q. Are the inclusive any network, mobile to mobile minutes shared between all of the employees on the plan or does each employee have their own inclusive minutes?



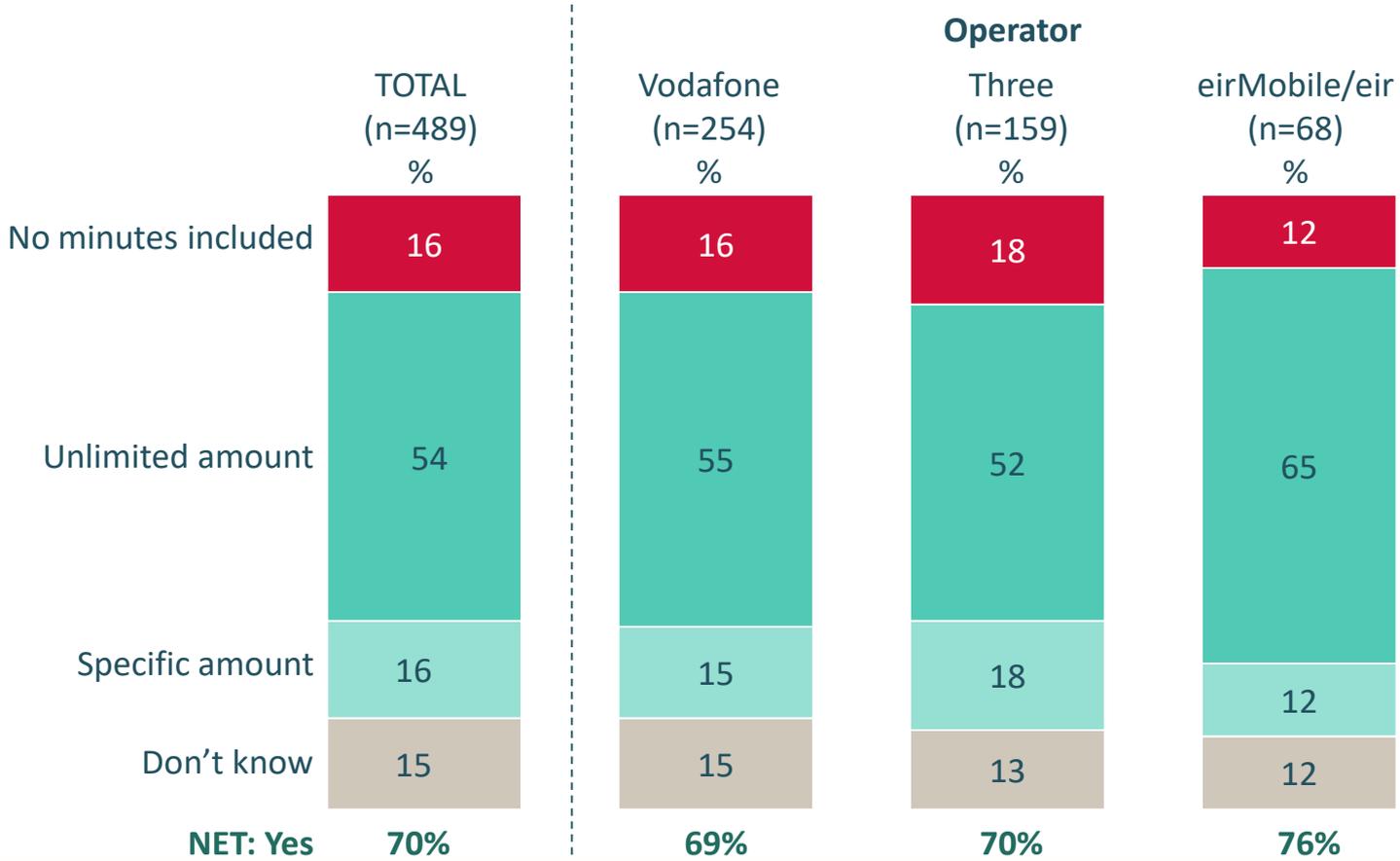
Amongst surveyed SMEs with Bill Pay mobile contracts that include minutes to any network, 58% claim that these minutes are shared across all employees, while 39% say that each employee has a specific quota of minutes.



# Inclusive Minutes To Fixed Line Phones

(Base: All SMEs With Bill Pay Mobile Contracts, n=489)

Q. Does your package contain inclusive minutes that can be used for calls to any fixed line phone



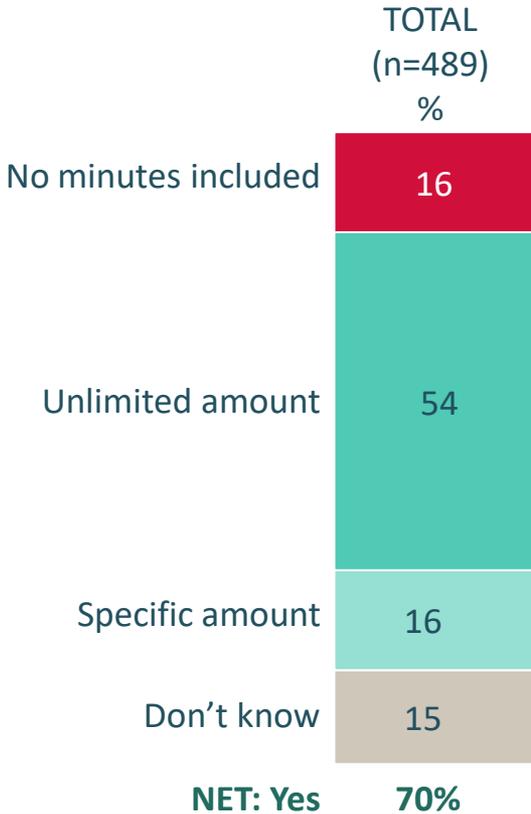
54% of all SMEs with Bill Pay mobile contracts receive an unlimited amount of inclusive minutes that can be used for calling fixed line phones, according to this survey.



# Inclusive Minutes To Fixed Line Phones

(Base: All SMEs With Bill Pay Mobile Contracts, n=489)

Q. Does your package contain inclusive minutes that can be used for calls to any fixed line phone



OTT Usage	
OTT Voice Users (208)	OTT Message Users (178)
18%	12%
50%	58%
17%	17%
15%	12%
<b>67%</b>	<b>77%</b>

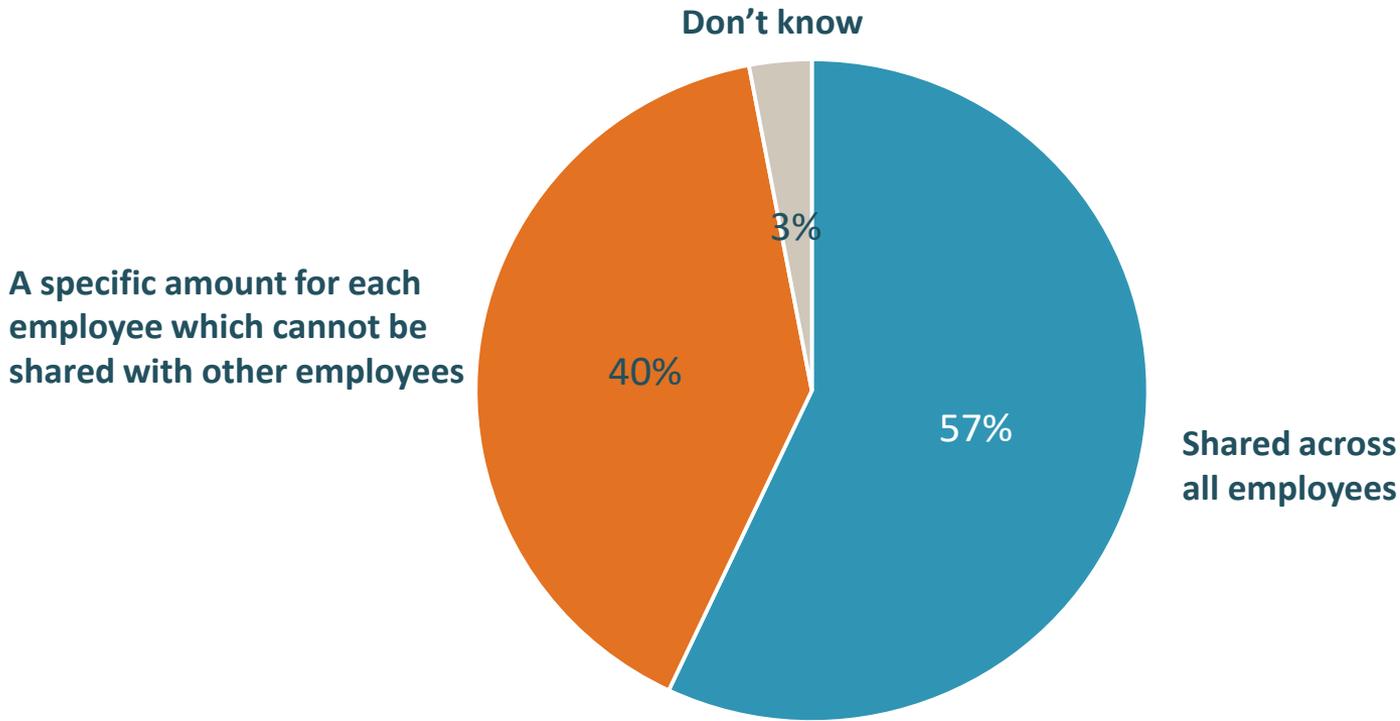
54% of all SMEs with Bill Pay mobile contracts receive an unlimited amount of inclusive minutes. This figure is slightly higher among OTT message users.



# Distribution of Inclusive Fixed Line Minutes

(Base: All SMEs With Bill Pay Mobile Contracts With Inclusive Fixed Line Minutes, n=341)

Q. Are the inclusive calls to any fixed line phone minutes shared between all of the employees on the plan or does each employee have their own inclusive minutes?



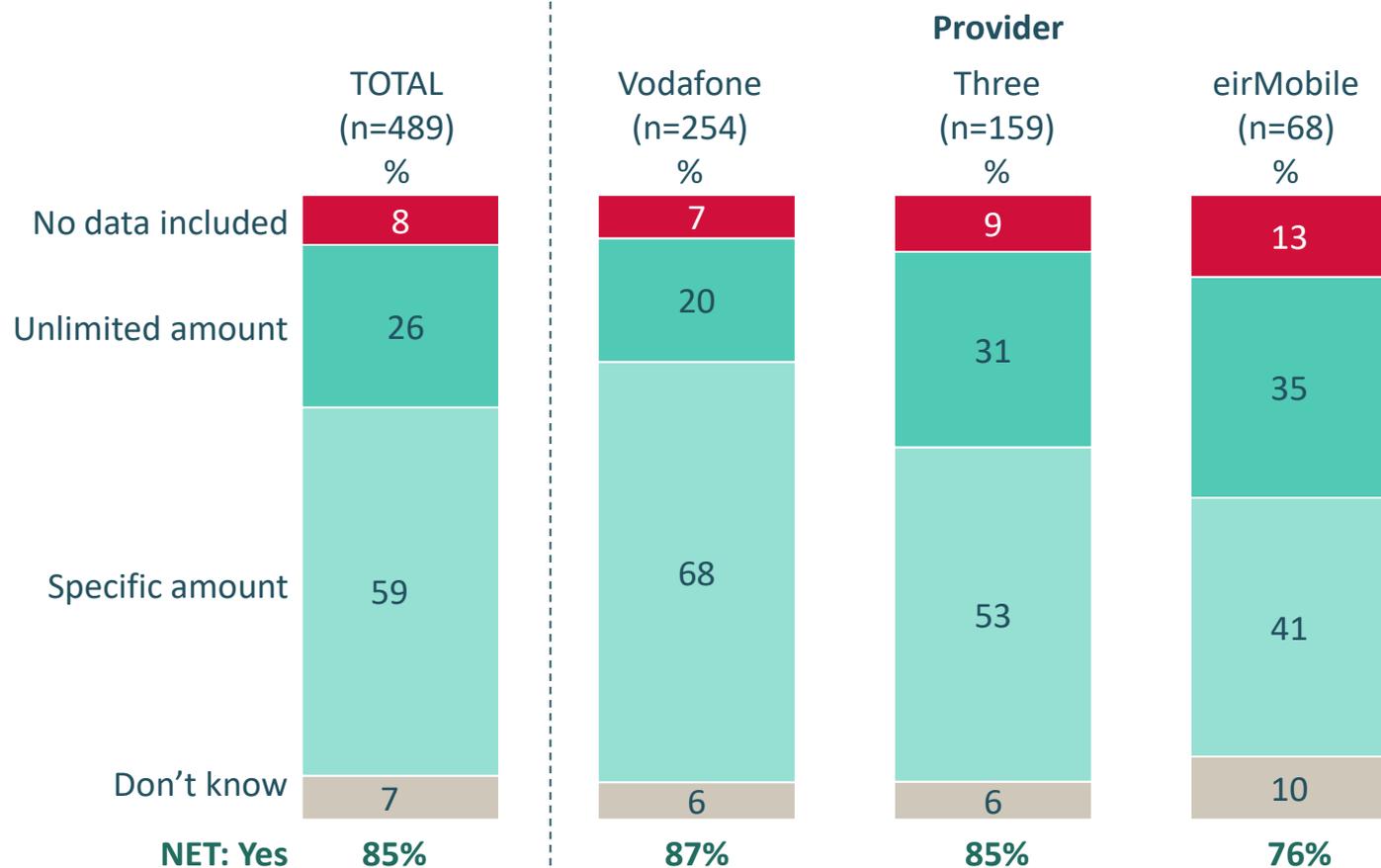
Amongst those in the survey on a Bill Pay mobile contract that includes fixed line minutes, 57% state that these minutes are shared across all employees, while 40% say that the each employee is given a specific amount of minutes each.



# Inclusive Data Allowance

(Base: All SMEs With Bill Pay Mobile Contracts, n=489)

Q. Does your package contain inclusive data allowance?



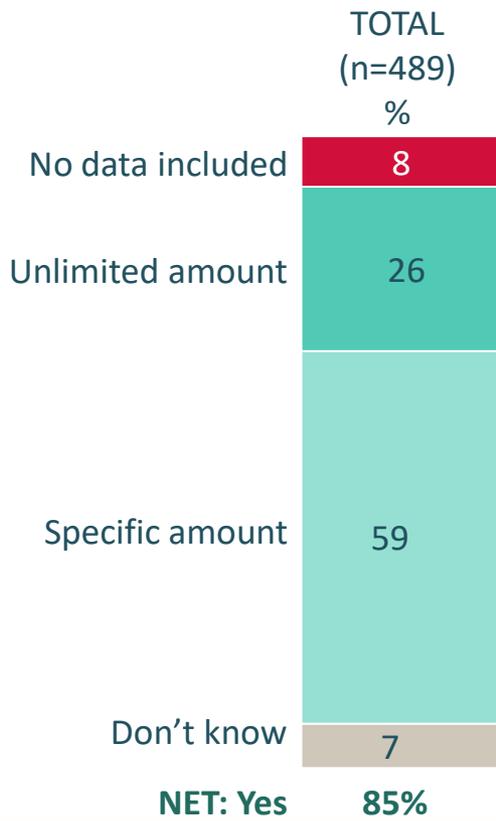
26% of SMEs on Bill Pay mobile contracts in this survey receive an unlimited amount of data as part of their package - 20% of those with Vodafone report having unlimited data in their package, compared to 31% of those with Three and 35% of those with eirMobile.



# Inclusive Data Allowance

(Base: All SMEs With Bill Pay Mobile Contracts, n=489)

Q. Does your package contain inclusive data allowance?



OTT Usage	
OTT Voice Users (208)	OTT Message Users (178)
5%	4%
28%	28%
61%	62%
7%	6%
<b>88%</b>	<b>90%</b>

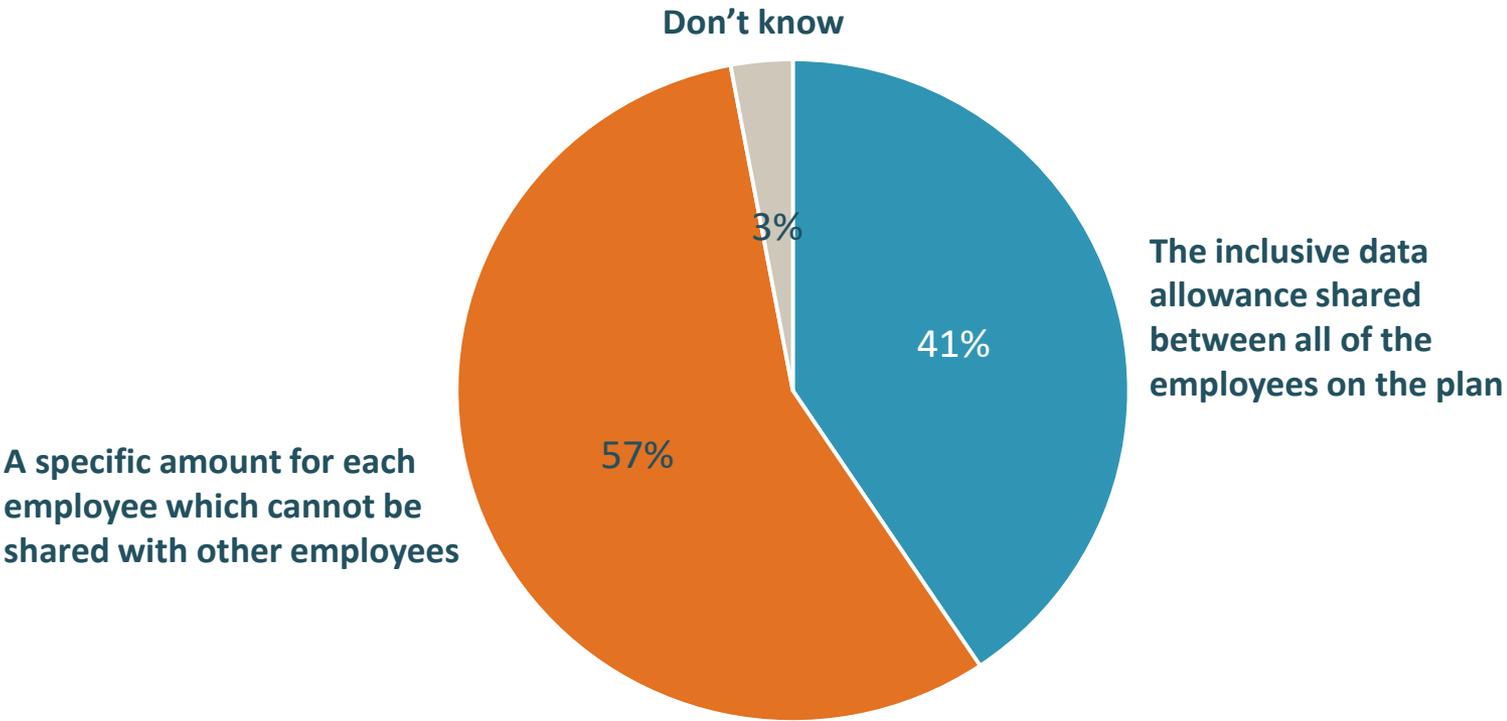
26% of SMEs on Bill Pay mobile contracts in this survey receive an unlimited amount of data as part of their package - 59% get a specific amount as part of their data allowance. 90% of OTT message users have an unlimited or limited data allowance.



# Distribution of Inclusive Data Allowance

(Base: All SMEs With Bill Pay Mobile Contracts With Inclusive Data Allowance, n=414)

Q. Is the inclusive data allowance shared between all of the employees on the plan or does each employee have their own data allowance?



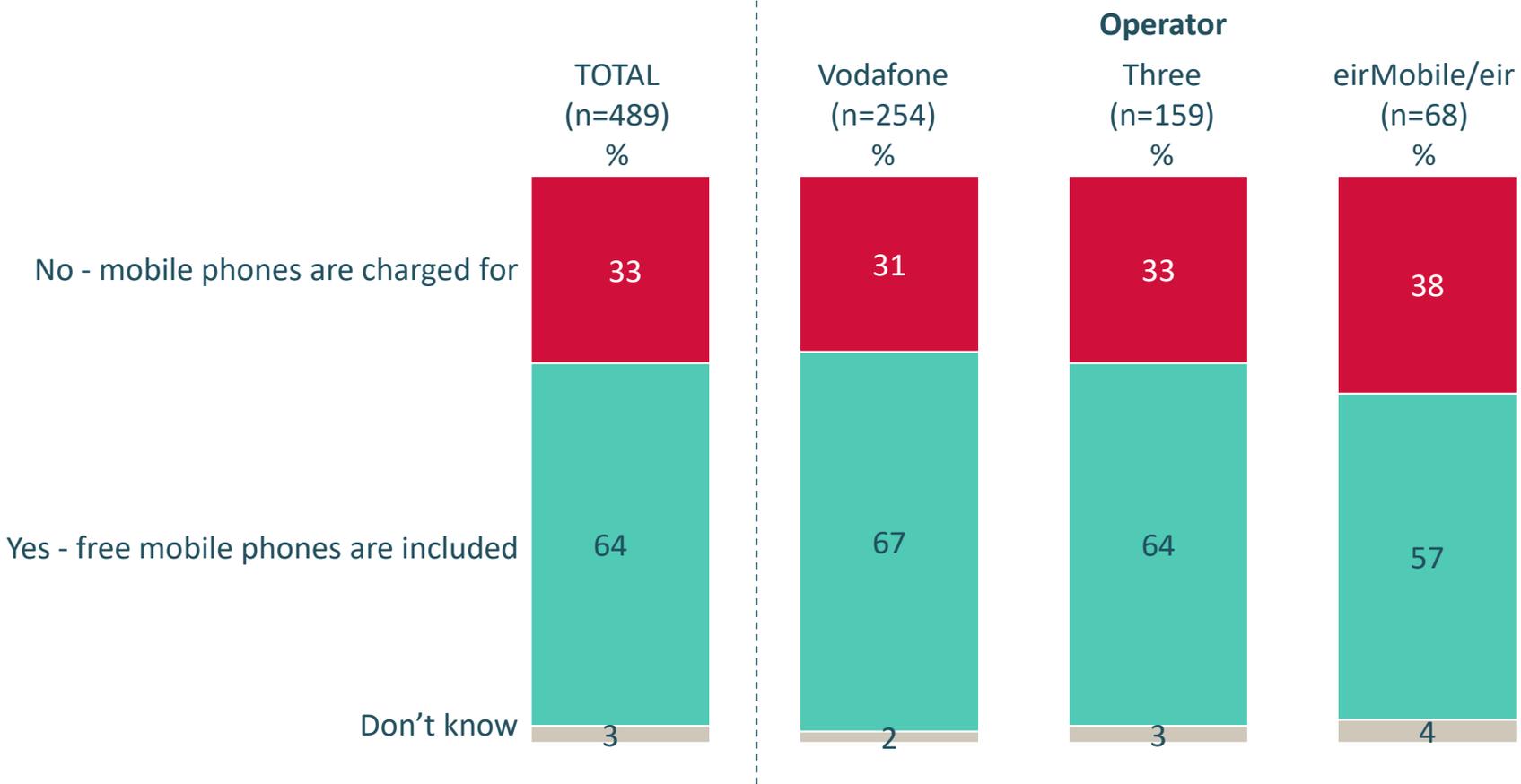
Amongst those SMEs in this survey on a Bill Pay contract with an inclusive data allowance, 41% say that data allowance is shared between all employees on the plan.



# Incidence Of Plan/Package Including Free Mobile Phones

(Base: All SMEs With Bill Pay Mobile Contracts, n=489)

Q. Does your package include free mobile phones, subject to a contract being in place?



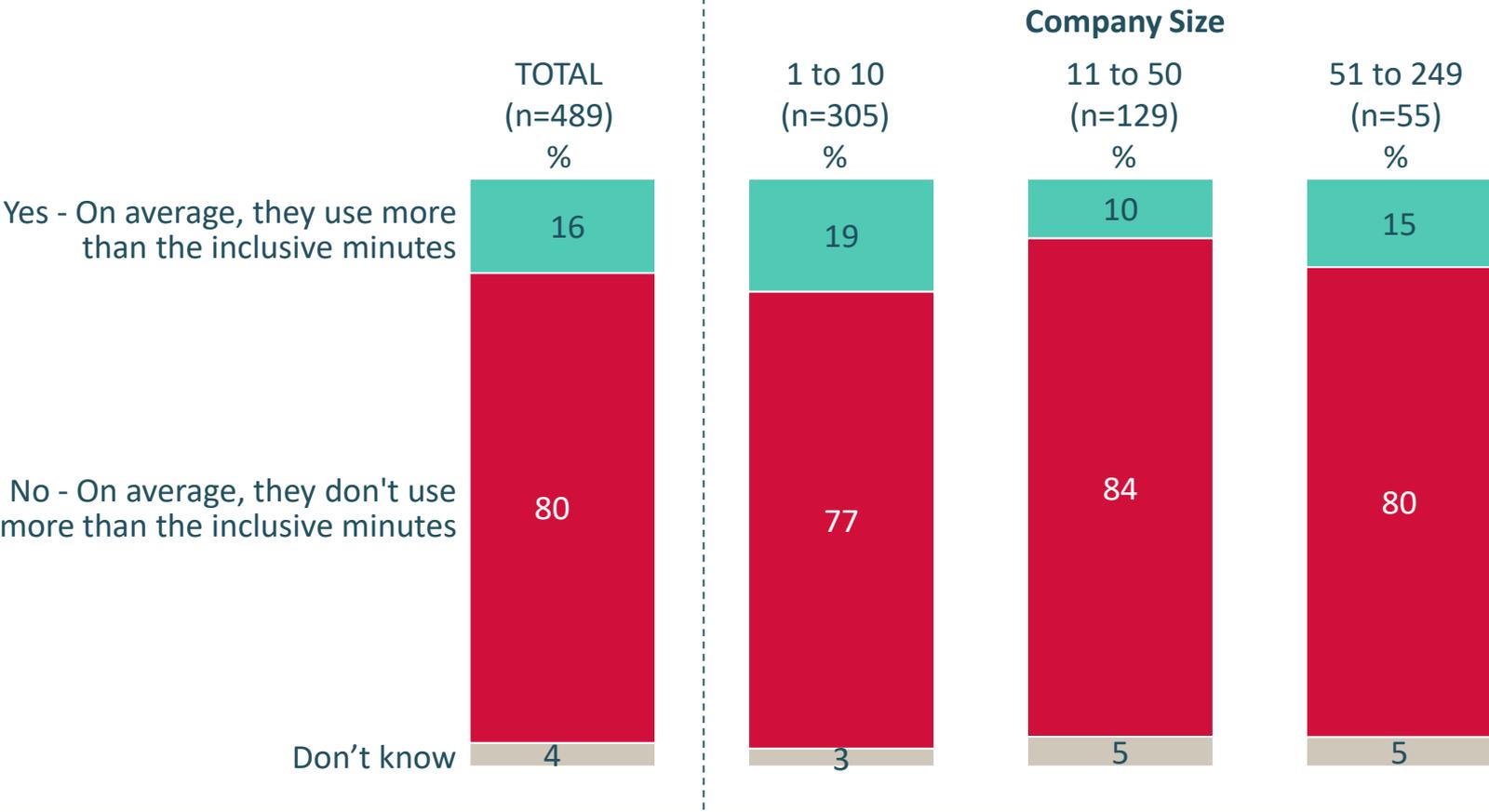
64% of SMEs with Bill Pay mobile contracts receive free mobile phones as part of their contract, however 33% say that their contract does not include free phones, according to this survey.



# Average Usage Of Inclusive Minutes

(Base: All SMEs With Bill Pay Mobile Contracts, n=489)

Q. On average do the employees use more than the set amount of voice minutes included in your plan?



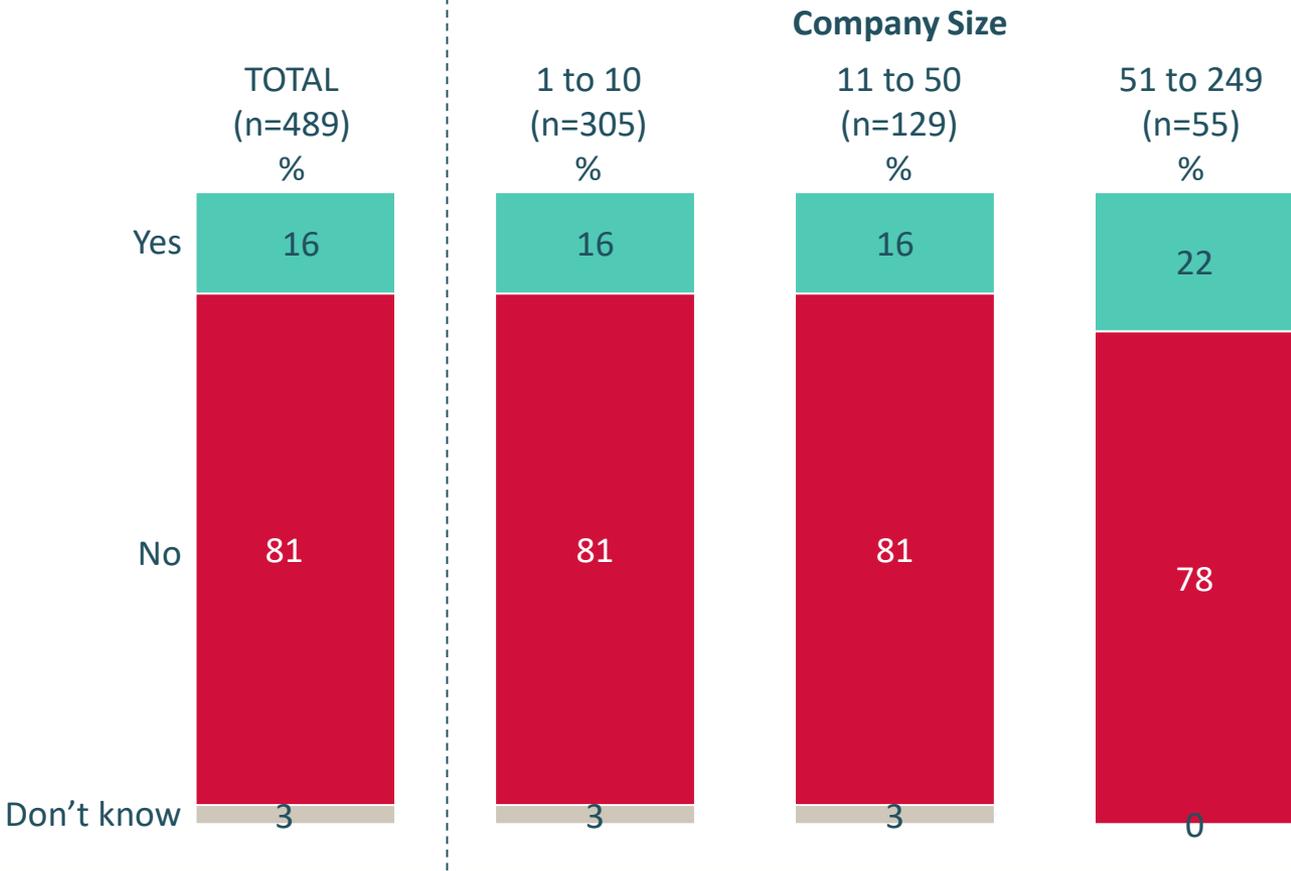
80% of SMEs on a Bill Pay contract that took part in this survey say that, on average, the employees don't use more than the inclusive minutes on their package.



# Average Data Use Exceeding Allowance

(Base: All SMEs With Bill Pay Mobile Contracts, n=489)

Q. On average do the employees use more than the set amount of data allowed in your plan?



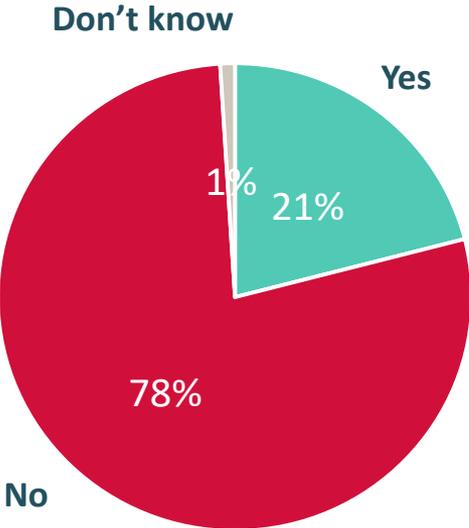
According to this survey, 81% of SMEs on Bill Pay contracts say that, on average, employees do not exceed their data allowance.



# Incidence Of Switching Plans In The Last 12 Months

(Base: All SMEs With Business Mobile Phones; n=500)

Q. Has your business switched plans or bespoke packages in the last 12 months?



	Company Size		
	0-10 (314)	11-50 (131)	51-249 (55)
Yes	20%	19%	35%
No	79%	80%	64%
Don't know	1%	1%	2%

**78% of surveyed SMEs with business mobile phones say that they have not changed their mobile plan/package in the past year.**



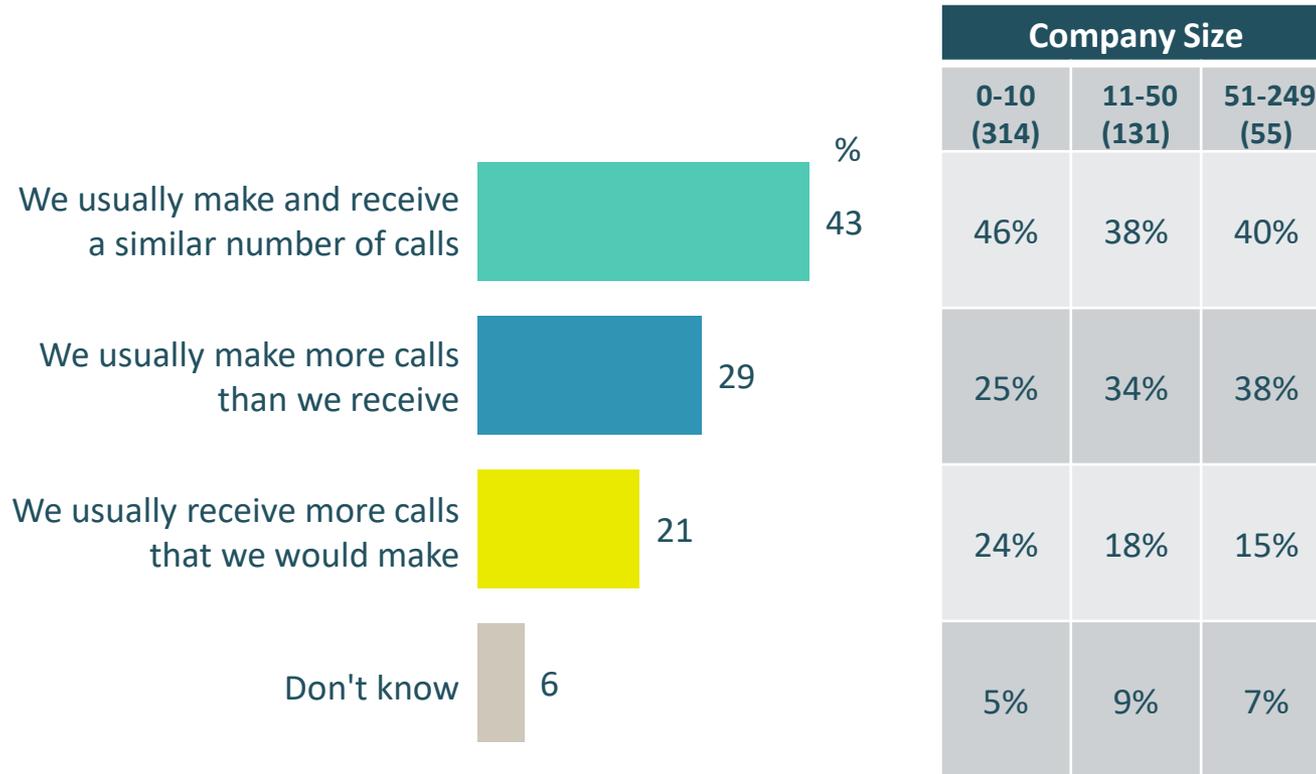


# Calling Patterns

# Business Mobile Phone Usage Type

(Base: All SMEs With Business Mobile Phones; n=500)

Q. Thinking about the use of business mobile phones in your organisation, which of the following best describes the company's usage in a typical month



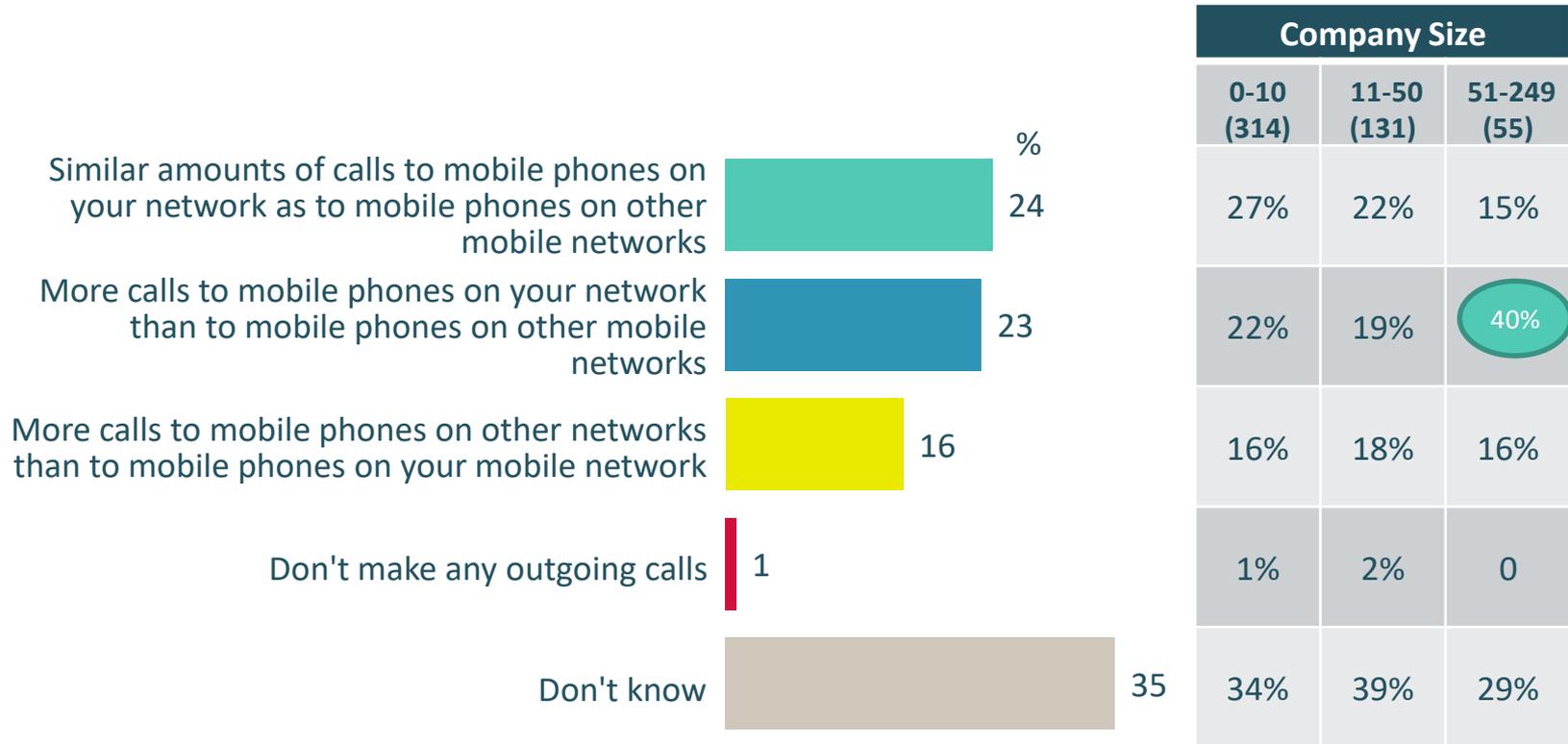
**43% of SMEs with business mobile phones say that generally users make and receive a similar number of calls per month, according to this survey.**



# Description of Type of Calls Made From Business Mobile Phone

(Base: All SMEs With Business Mobile Phones; n=500)

Q. Thinking about the calls made from business mobile phones to other mobile phones in a typical month, which of the following most accurately describes your business' usage?



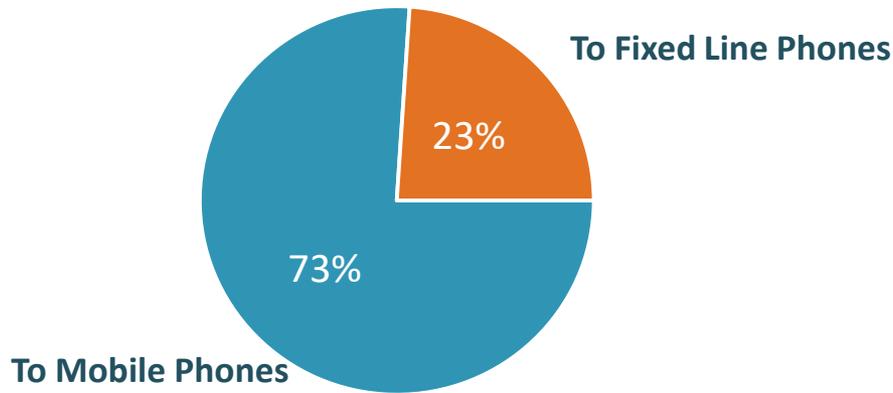
**35% of SME's with mobile phones in the survey do not know what type of calls are being made from business mobiles in terms of within or outside network while 24% report calls to mobile phone are on net with a similar number 23% off net. Off net calls higher among larger companies**



# Proportion of Calls Made From Business Mobile Phone

(Base: All SMEs With Business Mobile Phones; n=500)

Q. Thinking about the calls made from your business' mobile phones in a typical month, could you state the proportion of calls to mobile phones and fixed line phones?



	Company Size		
	0-10 (314)	11-50 (131)	51-249 (55)
Mobile Phones	74%	72%	70%
Fixed Line Phones	26%	28%	30%

On average, 73% of calls made from business mobiles in a typical month are to mobile phones according to SMEs in this survey.



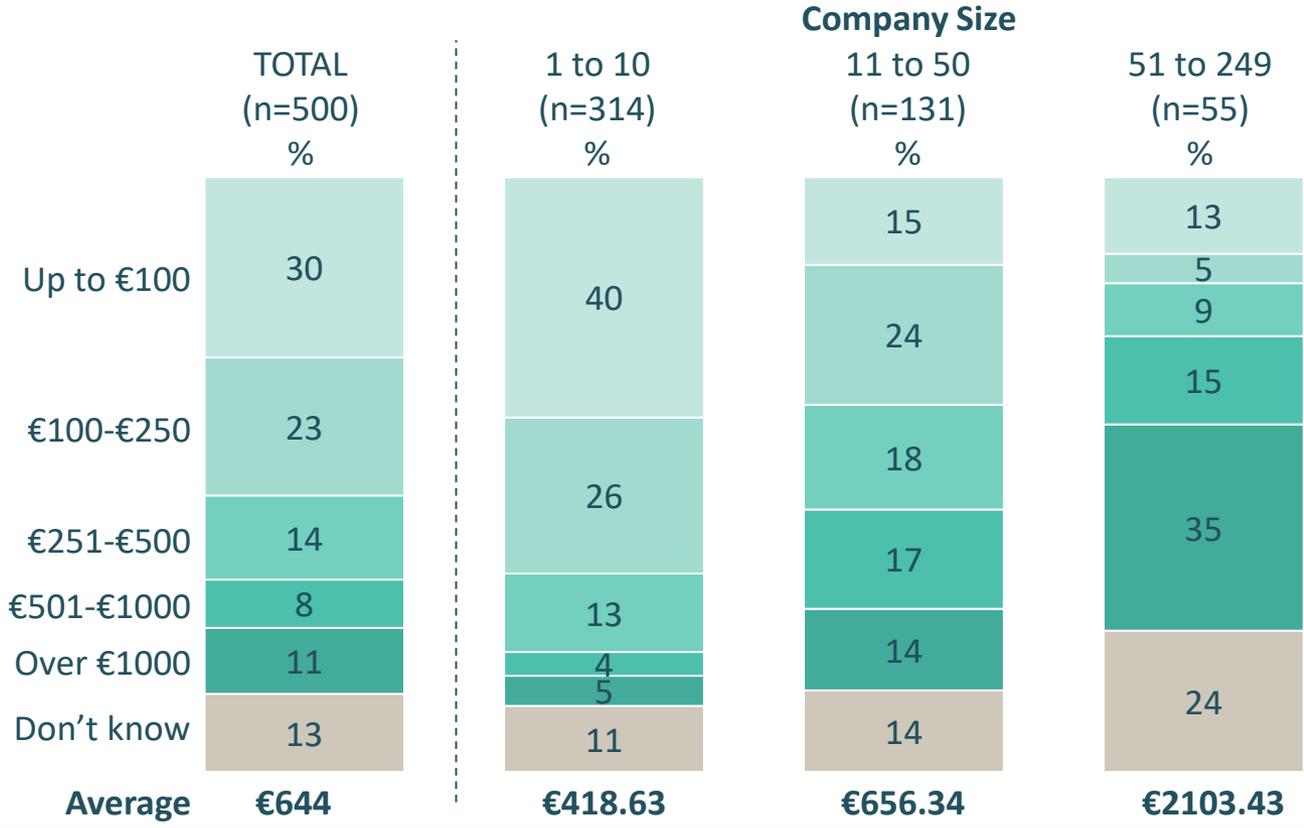


# Cost Awareness

# Typical Total Monthly Recurring Mobile Cost

(Base: All SMEs With Business Mobile Phones; n=500)

Q. What would the typical total recurring monthly mobile cost be for all employees with business mobile phones including the basic cost of the plan/package/bespoke deal and the cost of any out of package calls or other services but excluding the cost of a fixed line phone which may be supplied by the same operator?



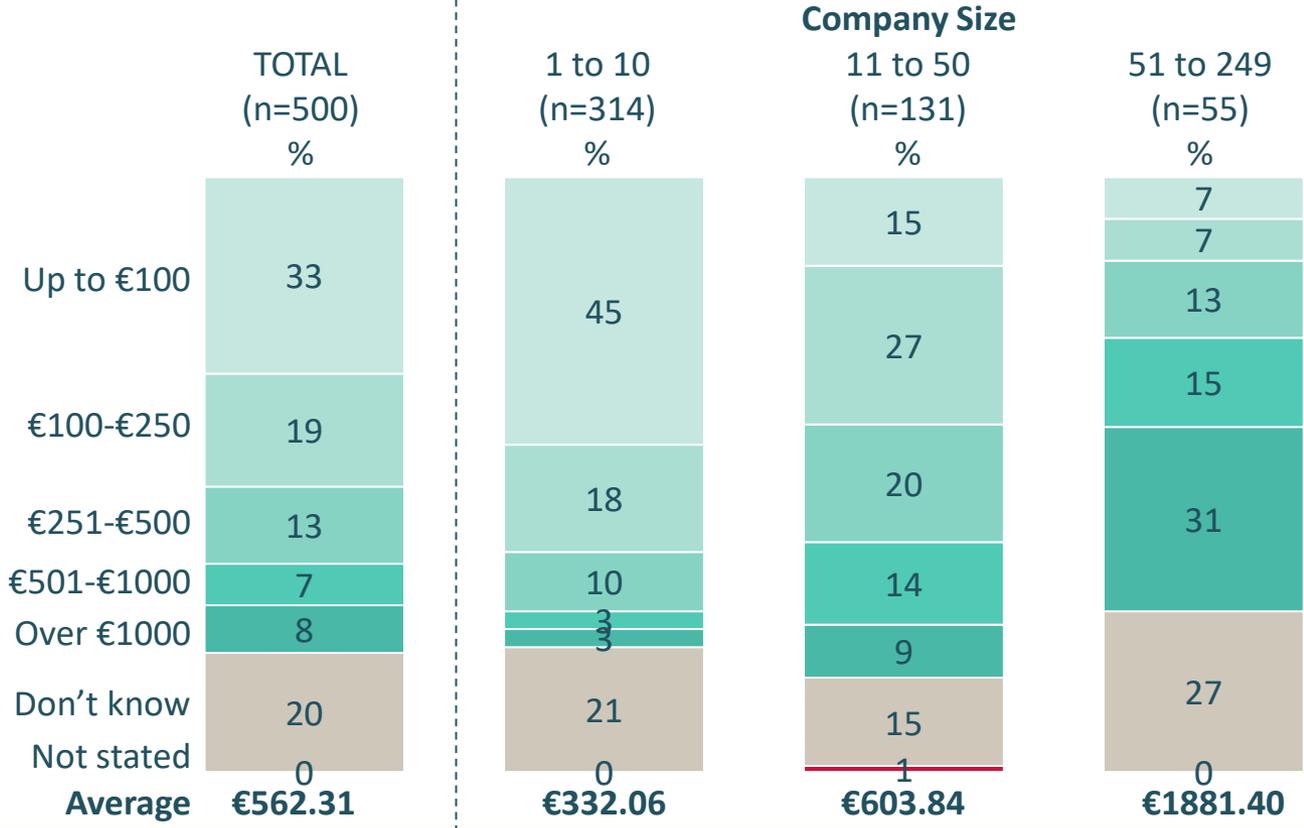
30% of SME's in the survey have a recurring monthly mobile phone bill costing up to €100.



# Typical Monthly Recurring Cost Of Mobile Plan/Package Only (Excluding Additional Charges)

(Base: All SMEs With Business Mobile Phones; n=500)

Q. What approximately is the total monthly cost of providing mobile phone service to employees (not including any additional charges)?



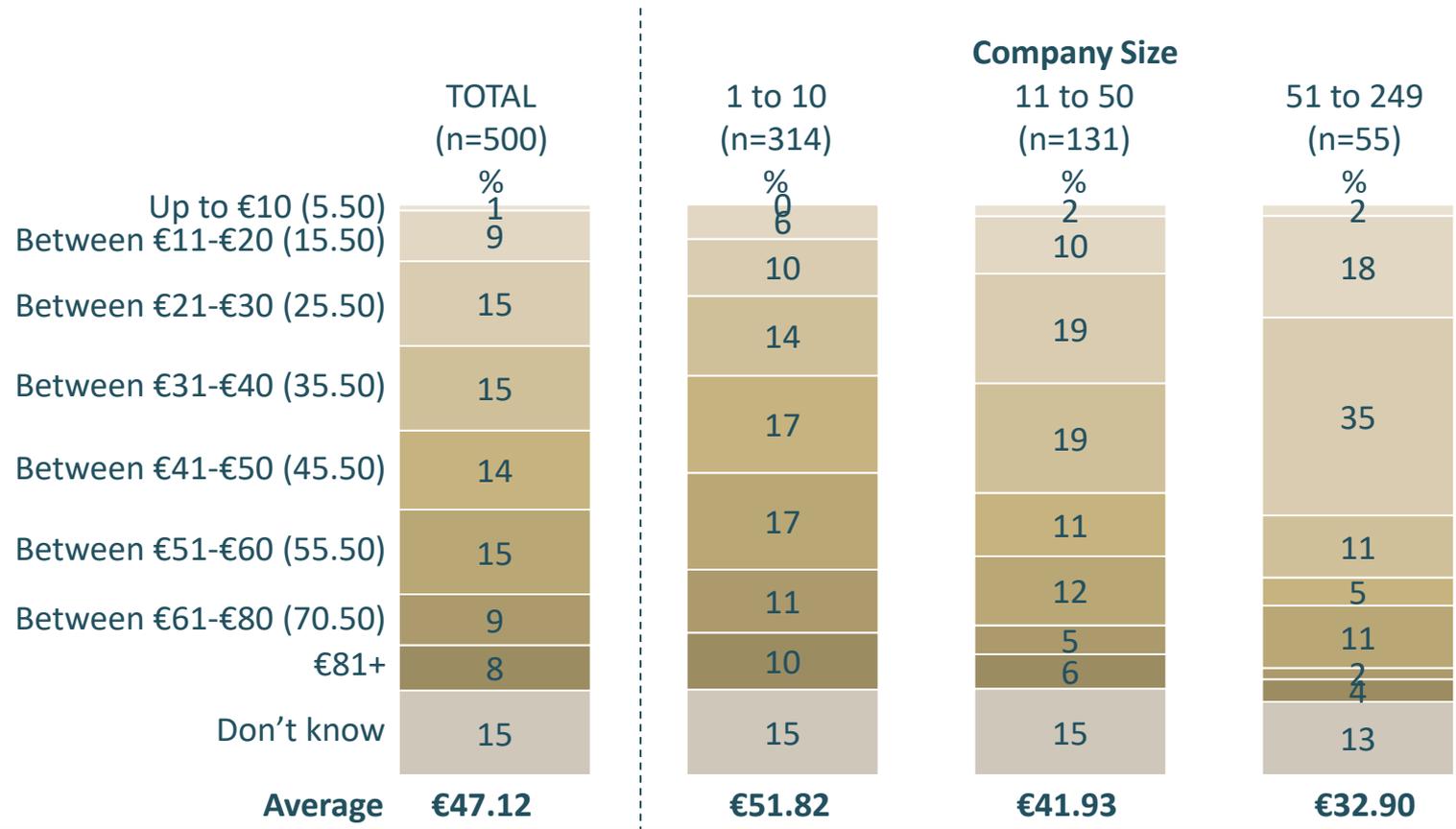
According to the SME's in this survey 33% spend up to €100 per month on a mobile plan excluding an additional charges.



# Typical Monthly Recurring Cost Of Mobile Plan/Package Per Employee

(Base: All SMEs With Business Mobile Phones; n=500)

Q. Approximately how much does this basic mobile plan or bespoke package cost per month per employee?



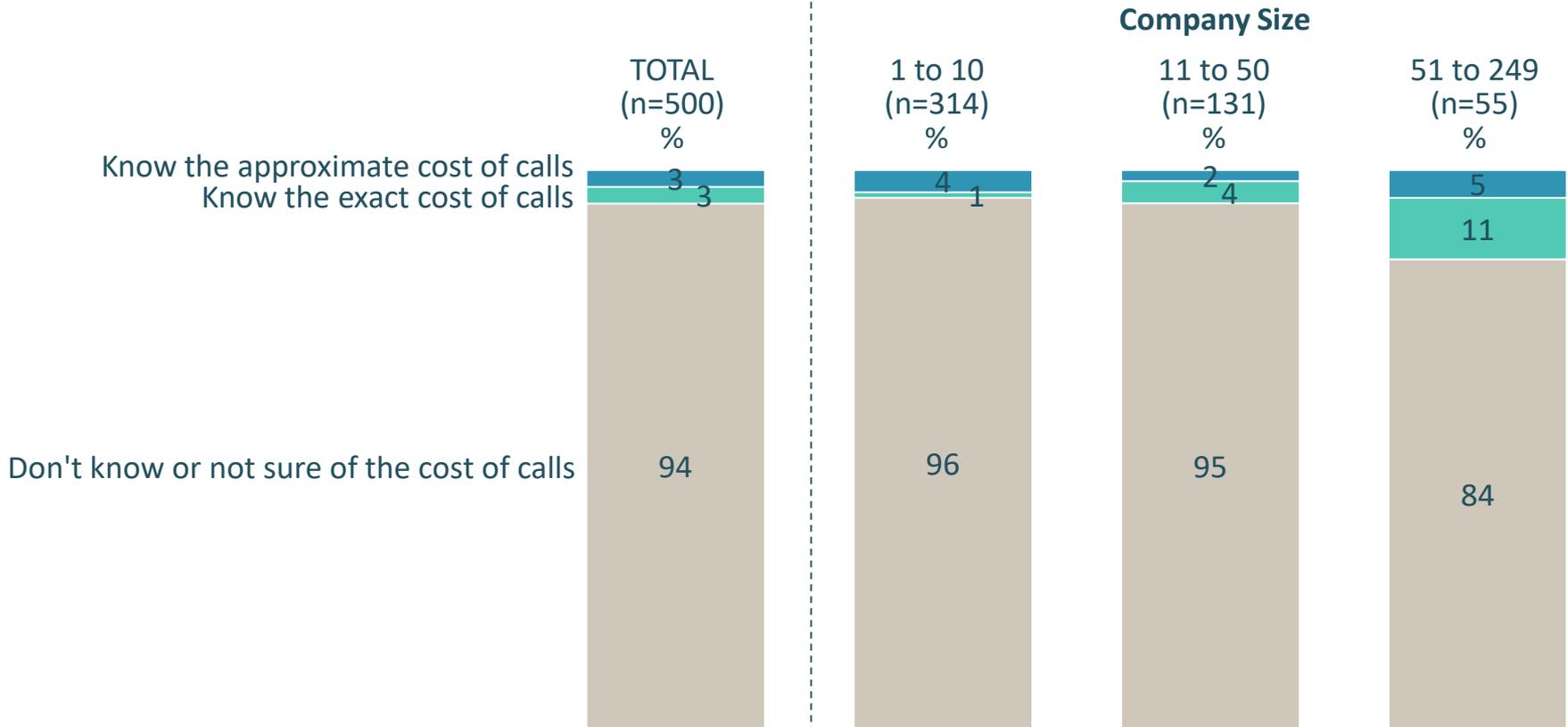
15% of SMEs with business mobile phones in this survey do not know the approximate cost of the basic mobile plan/bespoke package per month per employee.



# Knowledge Of The Per Minute Cost Of Making Calls Outside The Monthly Plan/Package Cost

(Base: All SMEs With Business Mobile Phones; n=500)

Q. Do you know the per minute cost of making calls from business mobile phone outside of the monthly plan/package?



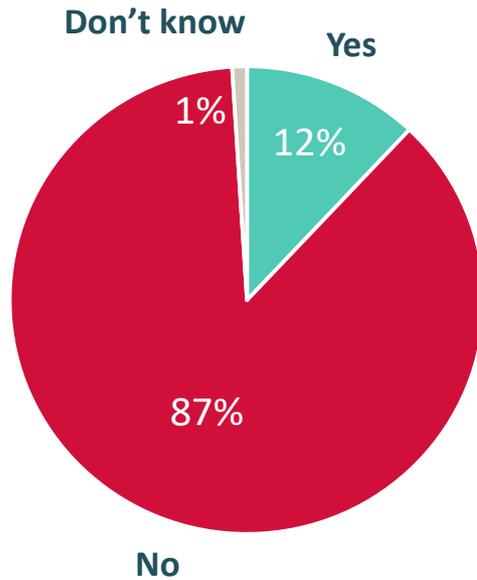
**94% of SMEs with business mobile phones in this survey don't know or are not sure of the per minute cost of making calls from their business phones outside of their monthly plan/package.**



# Noticed Changes In Business Mobile Costs In The Past Year

(Base: All SMEs With Business Mobile Phones; n=500)

Q. Thinking of your business' mobile phone costs, have you noticed any changes over the last twelve months?



	Company Size		
	0-10 (314)	11-50 (131)	51-249 (55)
Yes	10%	12%	20%
No	89%	87%	80%
Don't know	1%	1%	0

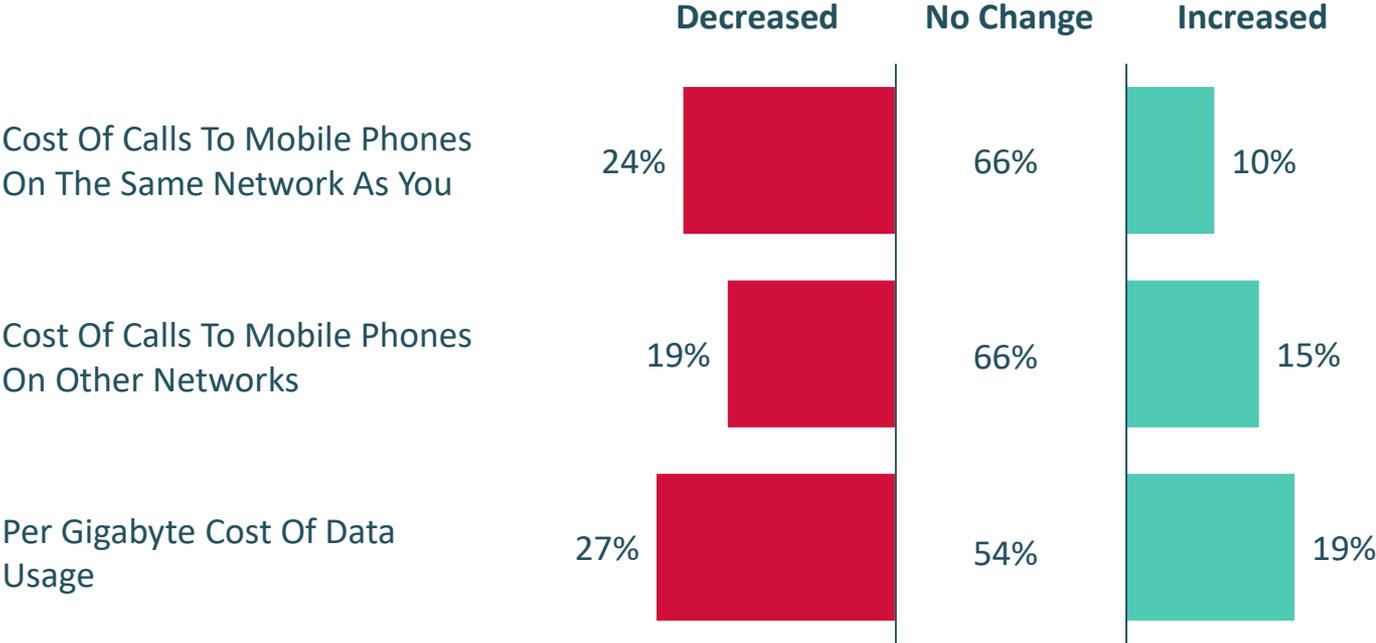
87% of all SMEs with business mobile phones in this survey say they have not noticed any changes over the past year in terms of their business' mobile costs; 12% say they have noticed a change.



# Specific Changes Noticed: Summary

(Base: All SMEs With Business Mobile Phones Who Noticed Changes; n=59)

Q. Have you noticed the cost of any of the following changing (and indicate whether you believe the cost has increased or decreased)?



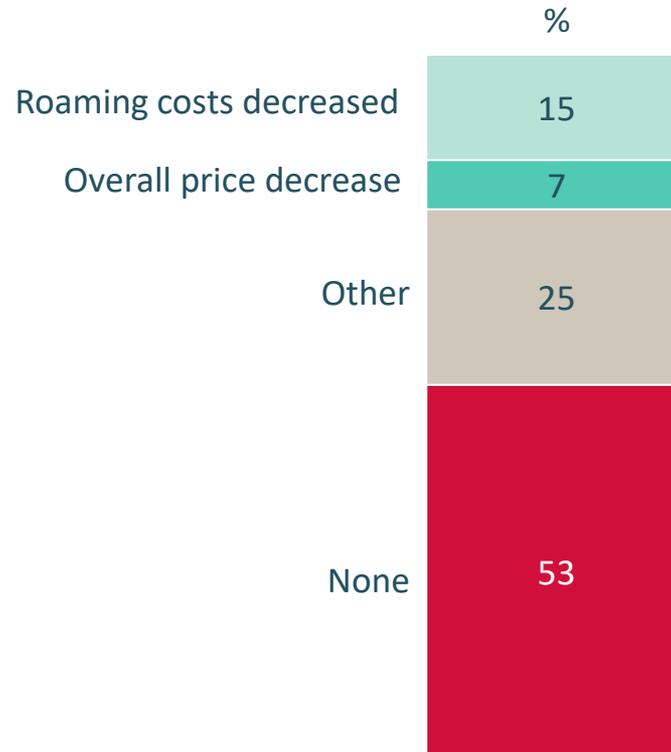
Amongst SMEs in the survey that have noticed a change in their business' mobile costs in the past 12 months, 24% say that the cost of calls to mobiles on the same network have decreased, and 27% say that the per gigabyte cost of data has reduced.



# Other Changes Noticed

(Base: All SMEs With Business Mobile Phones Who Noticed Changes; n=59)

Q. Have you noticed any other changes in the costs of making calls or the provision of data?



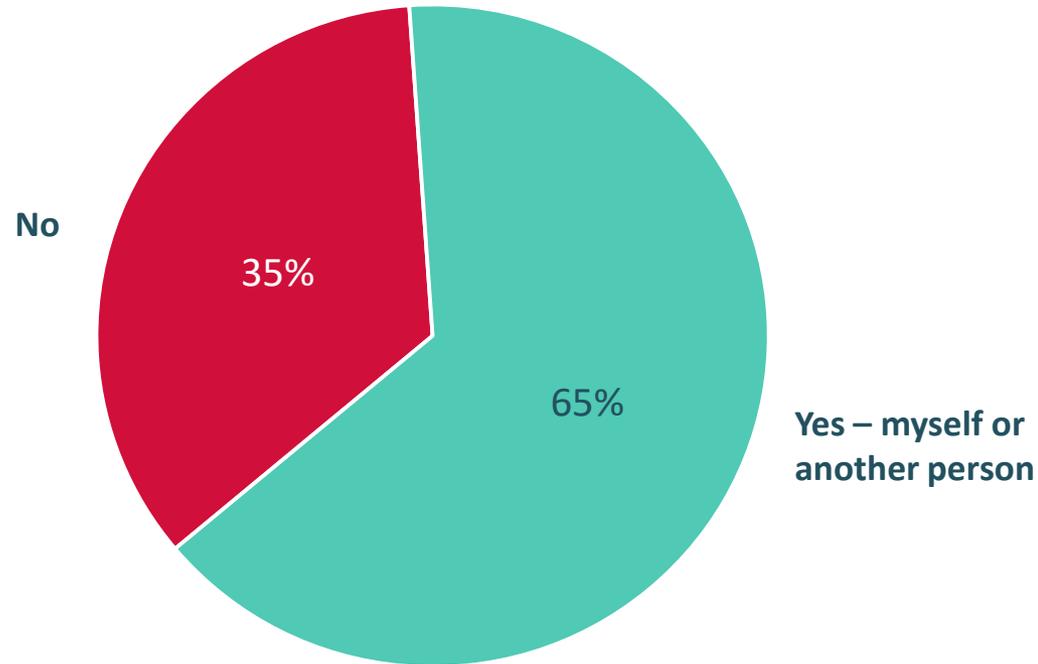
**15% of SMEs in the survey that have noticed a change in their business' mobile costs in the past 12 months say that roaming costs have decreased.**

**REDC**

# Checking Business Mobile Phone Bills

(Base: All SMEs With Bill Pay Mobile Contracts, n=489)

Q. Do you or does somebody else in your organisation check in detail the mobile phone bills that your business receives (either electronically or in the post)?



\*Note: Small Base Size

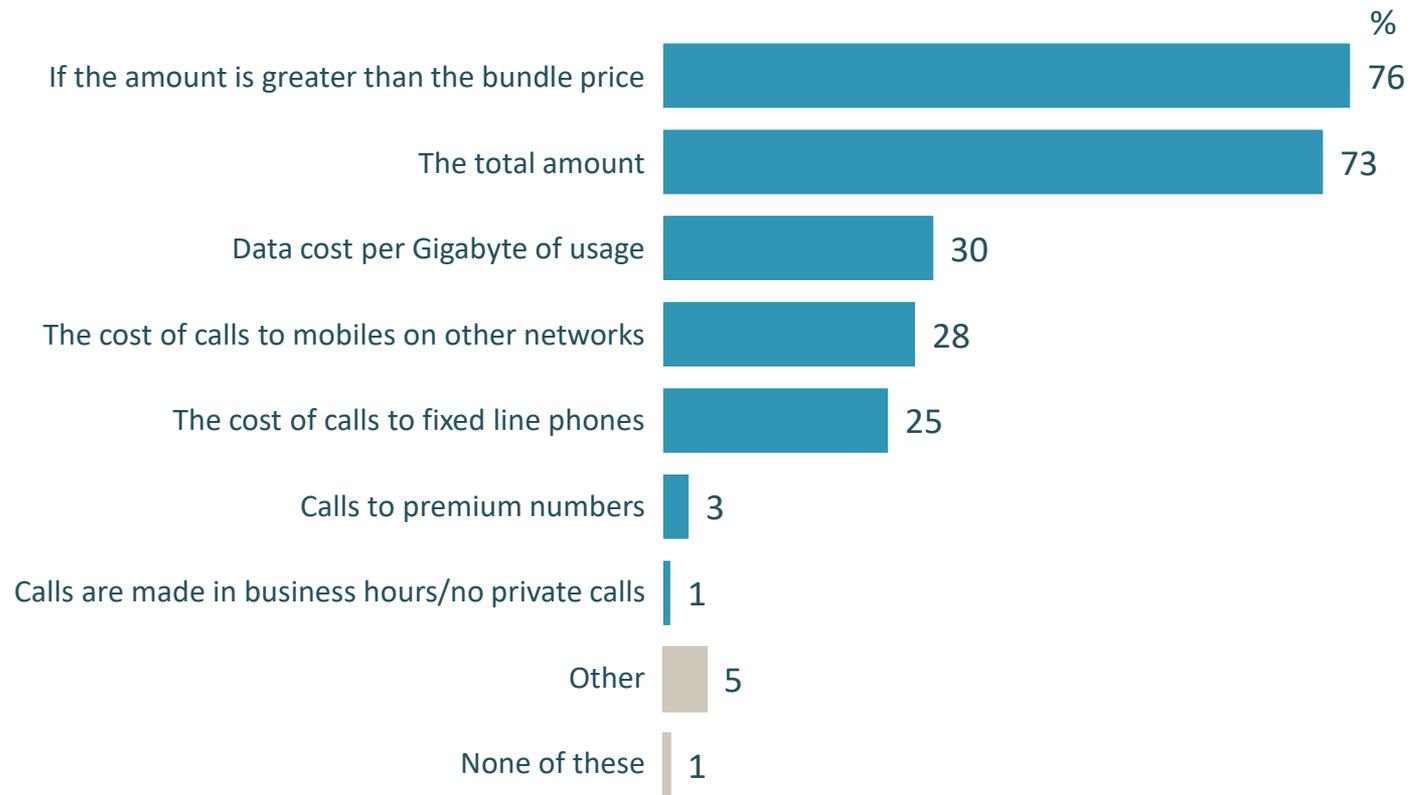
**65% of SMEs with mobile Bill Pay contracts claim that they or someone else within the organisation checks in detail the mobile phone bills that the business receives, according to this survey.**



# Items Checked On Mobile Phone Bills

(Base: All SME's Who Check Mobile Phone Bills, n=316)

Q. Which of the following are checked on each bill?



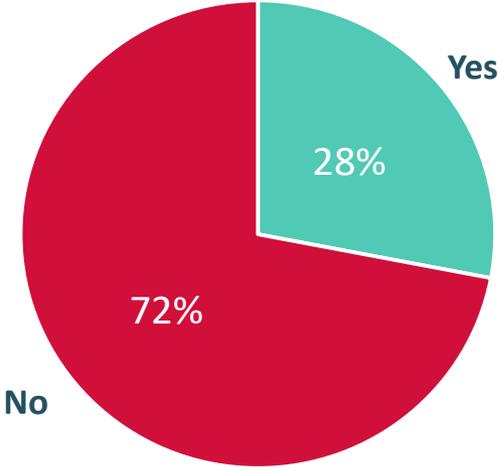
Amongst SMEs in this survey that check the business' mobile phone bills, 76% say they check to see if the amount is greater than the bundle price.



# Company Policy On Business Mobile Use

(Base: All SMEs With Business Mobile Phones; n=500)

Q. Does your company have a policy or guidelines on how your employees can or should use their business mobile phones?



	Company Size		
	0-10 (314)	11-50 (131)	51-249 (55)
Yes	18%	39%	56%
No	82%	61%	44%

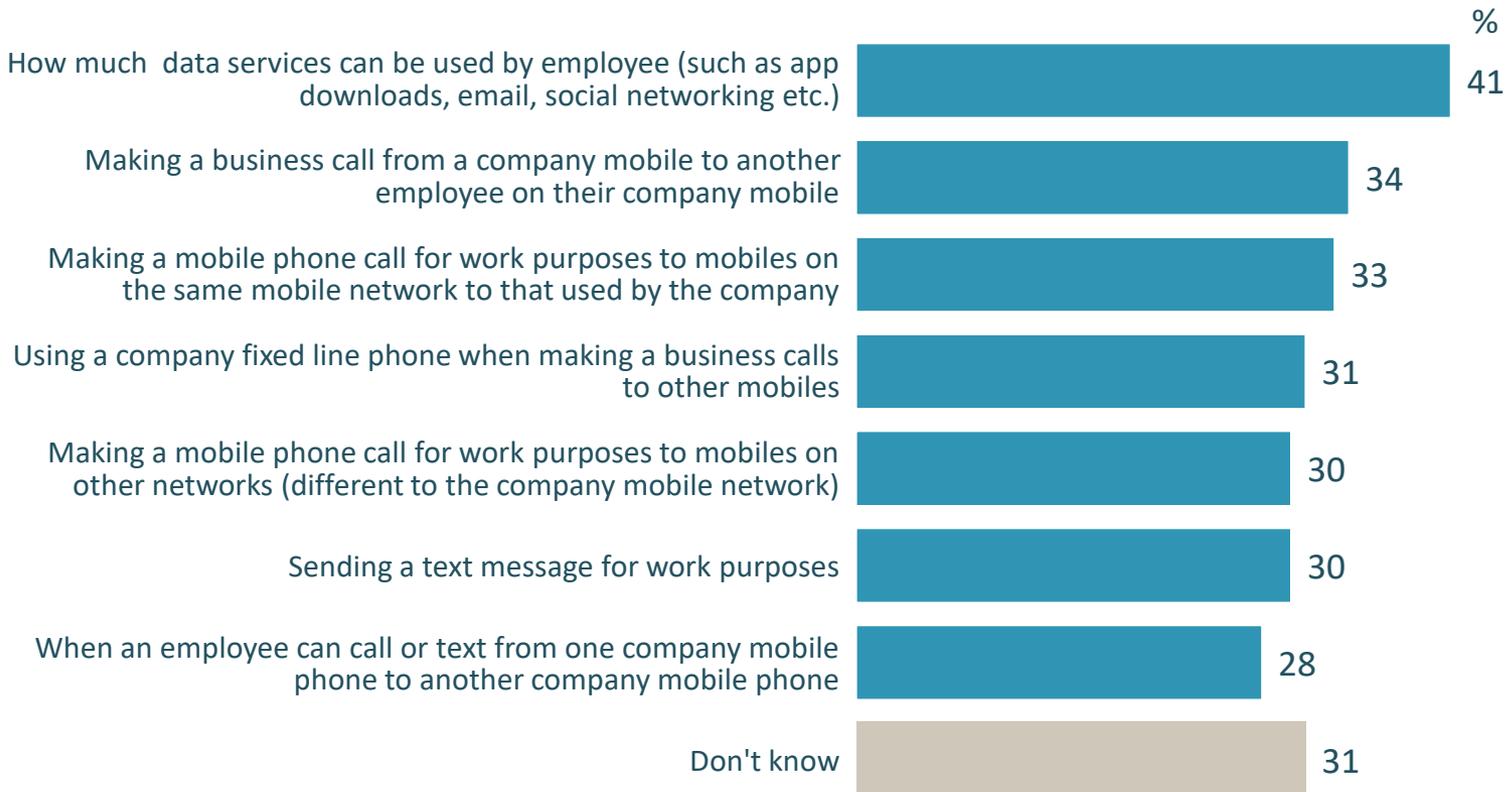
**72% of SMEs with business mobile phones in this survey claim that their business does not have a policy or guidelines on how employees should use their business mobile phones, 28% say that they do have a policy/guidelines in place.**



# Items Specified In The Policy

(Base: All SME's With Business Mobile Phone Policy, n=138)

Q. Does the policy or guidelines specify what the employee should do for each of the following activities?



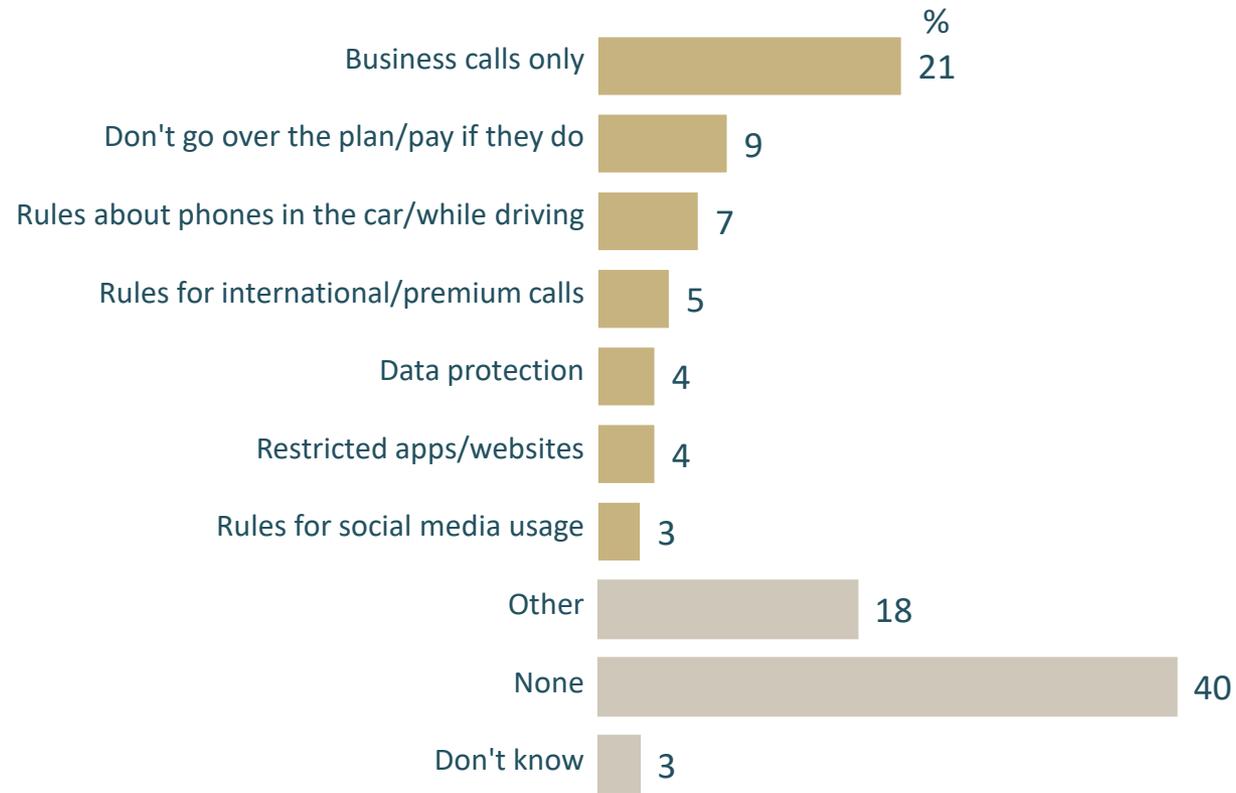
**Amongst SMEs in this survey that have a policy/guidelines on how employees should use their business mobile phones, 41% say that their policy/guidelines specifies how much data can be used by each employee.**



# Other Items Specified In The Policy

(Base: All SME's With Business Mobile Phone Policy, n=138)

Q. Are there any other activities not mentioned that the company has a policy or guideline for?



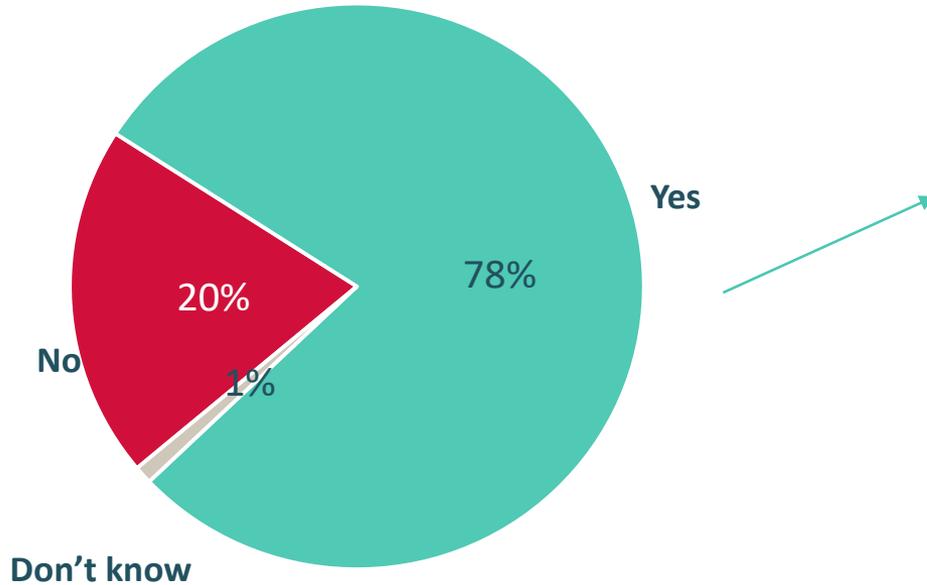
**21% of SMEs in this survey that have a policy/guidelines on how employees should use their business mobile phones say that their policy/guidelines states that business mobile phones are to be used for business calls only.**



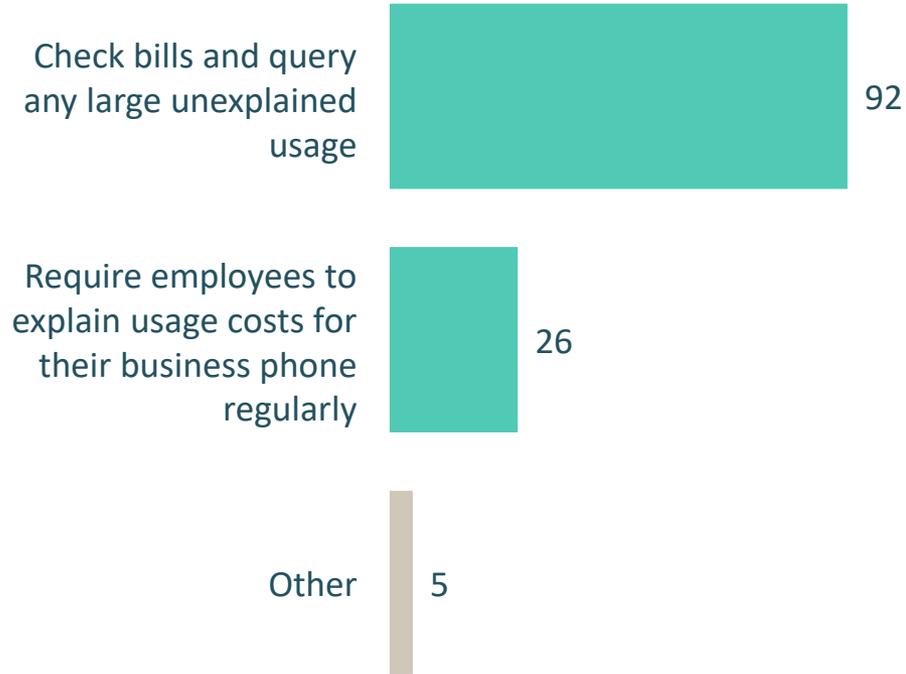
# Is The Policy Monitored & How?

(Base: All SME's With Business Mobile Phone Policy, n=138)

Q. Does your business actively monitor the policy?



Q. How do you monitor the employee usage policy?



**78% of SMEs in this survey that have a policy/guideline on how employees should use their business mobile phones actively monitor the policy.**

REDC

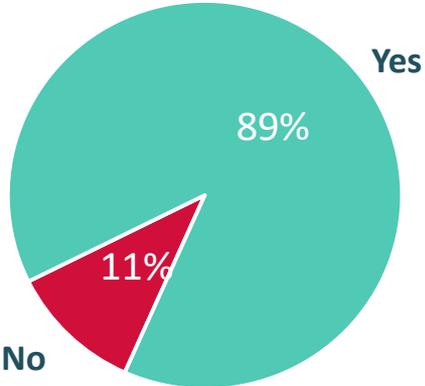


# Fixed Line Phone

# Incidence Of Having Fixed Line Phones

(Base: All SMEs With Business Mobile Phones; n=500)

Q. Does your business have fixed line phones?



	Company Size		
	0-10 (314)	11-50 (131)	51-249 (55)
Yes	86%	91%	96%
No	14%	9%	4%

Urban Vs. Rural Location			
Dublin (138)	Urban (337)	Urban ex Dublin (205)	Total Rural (163)
86%	90%	91%	87%
14%	10%	9%	13%

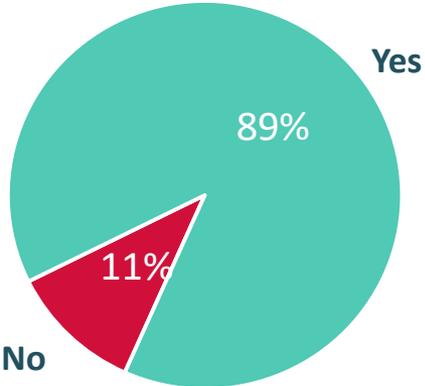
89% of SMEs taking part in this survey say that their business has fixed line phones.



# Incidence Of Having Fixed Line Phones

(Base: All SMEs With Business Mobile Phones; n=500)

Q. Does your business have fixed line phones?



	Sector							
	Agri/ Forest ry/ Fishin g (19*)	Mining/ Construct ion (40*)	Manufactur ing (35*)	Servic es (195)	Wholes ale (44*)	Reta il (95)	Health & Educati on (41*)	Publi c Admi n (31*)
Yes	84%	85%	94%	86%	91%	91%	93%	94%
No	16%	15%	6%	14%	9%	9%	7%	6%

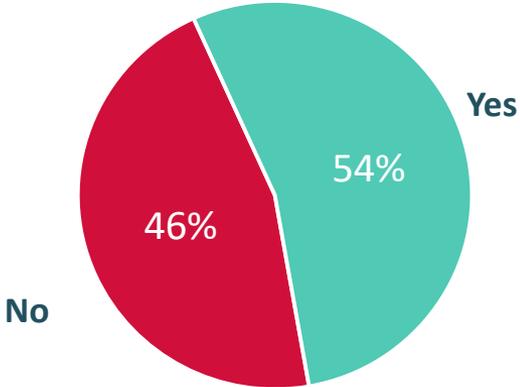
89% of SMEs taking part in this survey say that their business has fixed line phones.



# Incidence Of Having More Than One Fixed Line Phone Number

(Base: All SMEs With Fixed Line Phones; n=443)

Q. Do you have more than 1 fixed line phone number?



	Company Size		
	0-10 (271)	11-50 (119)	51-249 (55)
Yes	41%	72%	83%
No	59%	28%	17%

Urban Vs. Rural Location			
Dublin (119)	Urban (302)	Urban ex Dublin (187)	Total Rural (141)
58%	55%	53%	52%
42%	45%	47%	48%

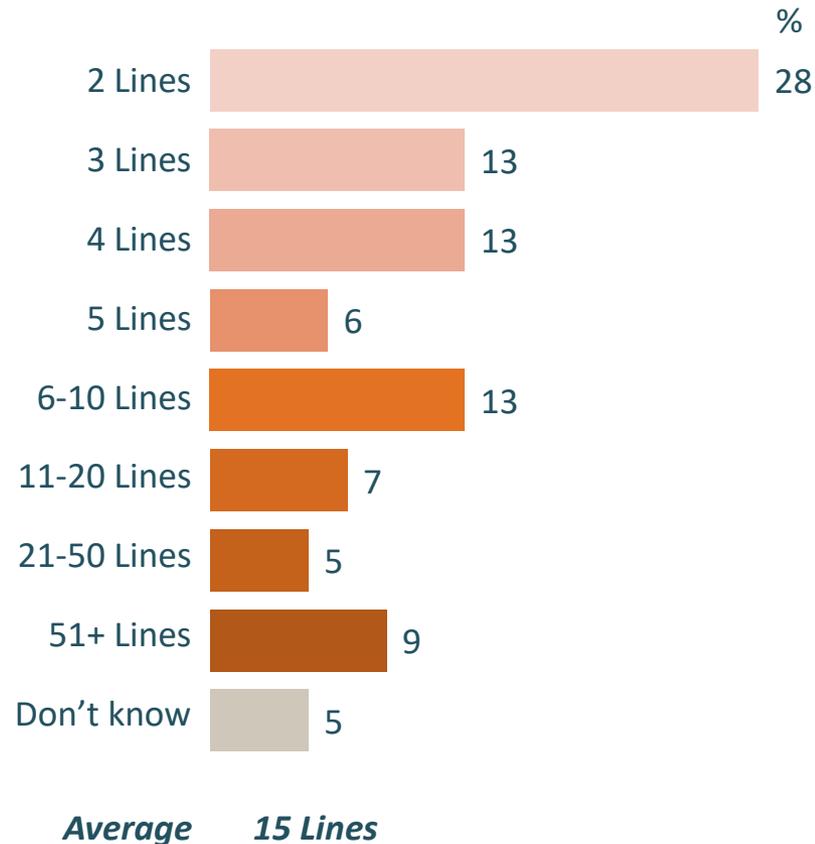
Amongst SMEs in this survey with fixed line phones, 54% say that they have more than one fixed line phone number.



# Number Of Fixed Line Phone Numbers

(Base: All SMEs With More Than One Fixed Line Phone Number; n=241)

Q. How many fixed line phone numbers do you have?



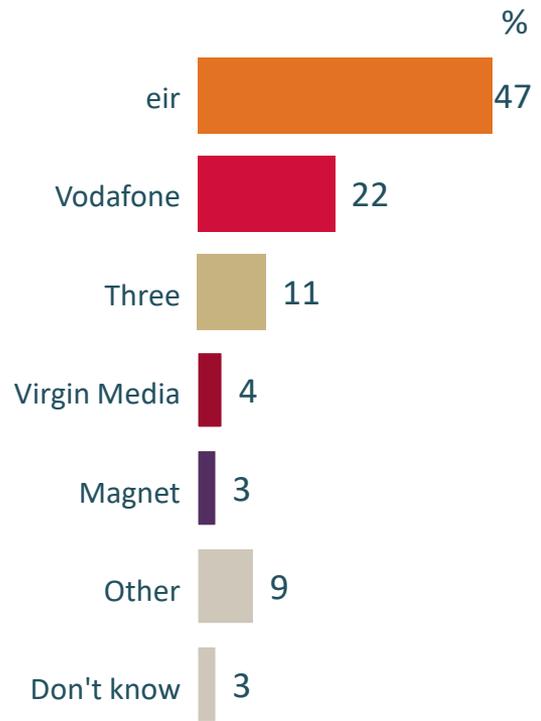
On average, SMEs in this survey with more than one fixed line phone have 15 fixed line phone numbers.



# Fixed Line Phone Provider

(Base: All SMEs With Fixed Line Phones, n=443)

Q. Which company provides your business fixed line phone service?



Company Size		
0-10 (271)	11-50 (119)	51-249 (55)
48%	46%	43%
27%	15%	17%
8%	16%	9%
2%	8%	2%
2%	5%	4%
8%	10%	19%
4%	1%	6%

Urban Vs. Rural Location			
Dublin (119)	Urban (302)	Urban ex Dublin (187)	Total Rural (141)
36%	44%	48%	54%
22%	23%	25%	22%
13%	11%	9%	10%
11%	5%	2%	0
3%	3%	3%	3%
11%	10%	11%	9%
3%	4%	4%	2%

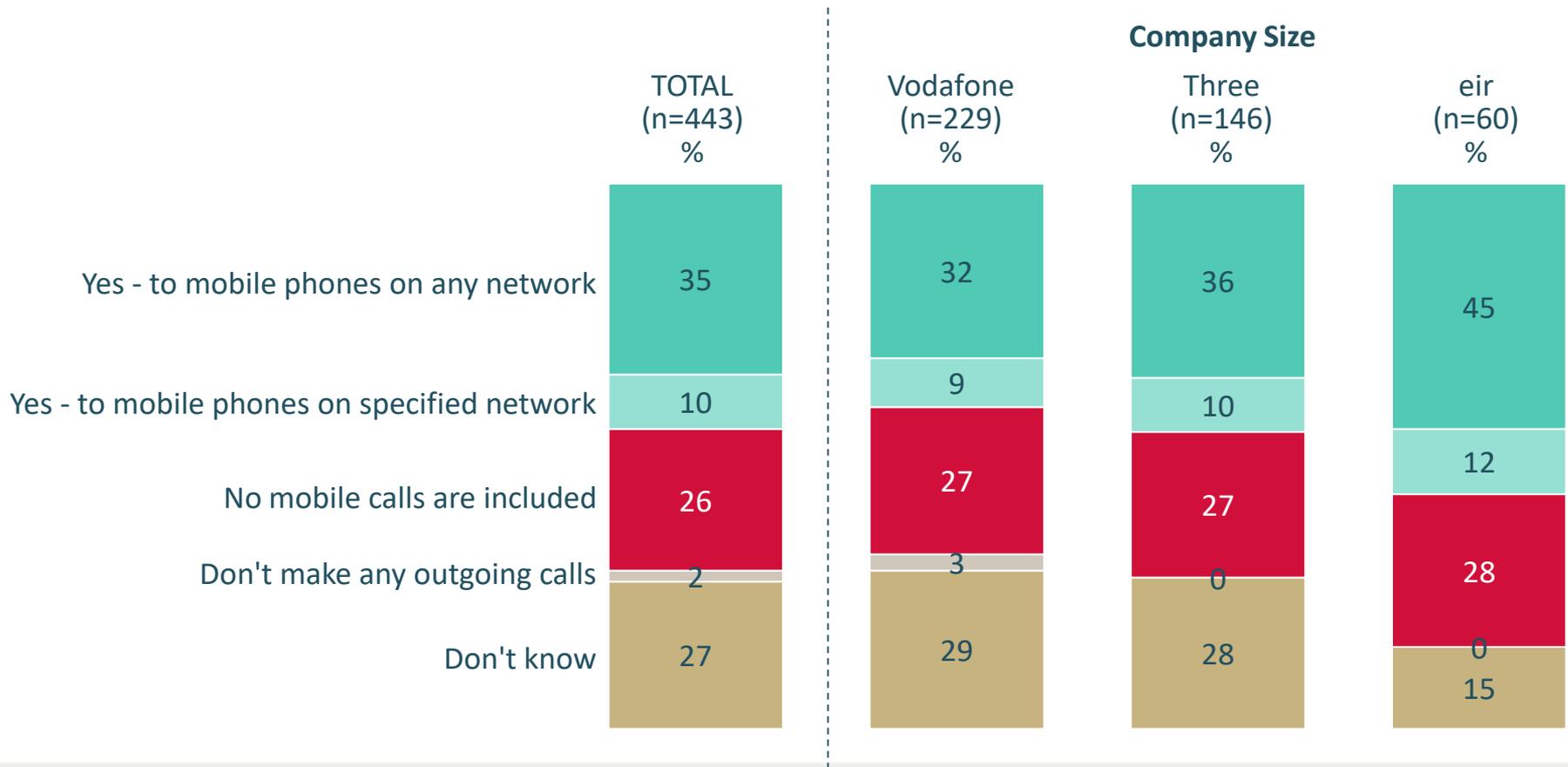
**47% of surveyed SMEs with fixed line phones use eir as their fixed line phone service provider.**



# Inclusive Minutes In Fixed Line Phone Package

(Base: All SMEs With Fixed Line Phones; n=443)

Q. Does your main fixed line plan or package include a set number of minutes that can be used to make calls to mobiles at no extra cost?



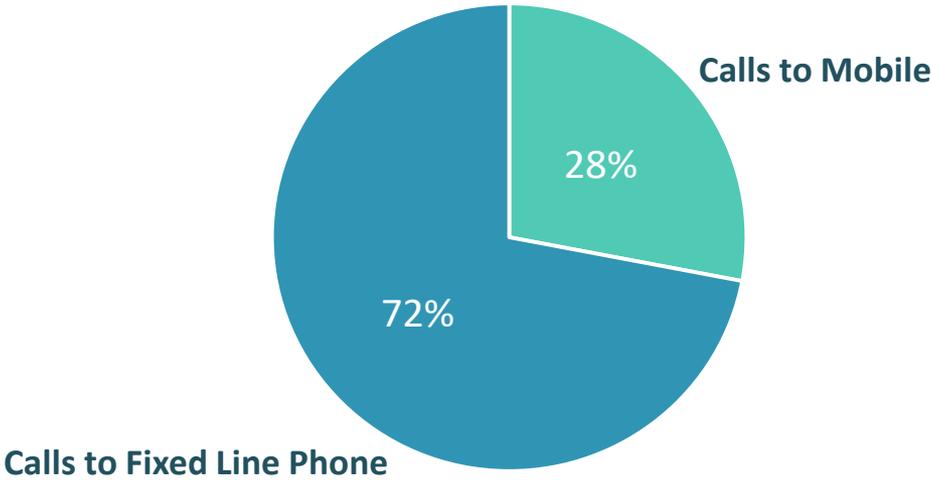
Amongst SMEs in this survey with fixed line phones, 35% have inclusive minutes to mobile phones on any network as part of their package.



# Proportion Of Outgoing Fixed Line Phone Calls To Mobile Phones

(Base: All SMEs With Fixed Line Phones; n=443)

Q. Thinking about the calls made from your main business fixed phone line in a typical month, could you state the proportion of calls which are to mobile phones and which are to fixed line phones?



	Company Size		
	0-10 (271)	11-50 (119)	51-249 (55)
Calls to Mobile	50%	53%	53%
Calls to Fixed Line Phone	50%	47%	47%

On average, in a typical month, 72% of calls made from businesses' main fixed phone lines are to other fixed lines, according to SMEs with fixed lines in this survey.



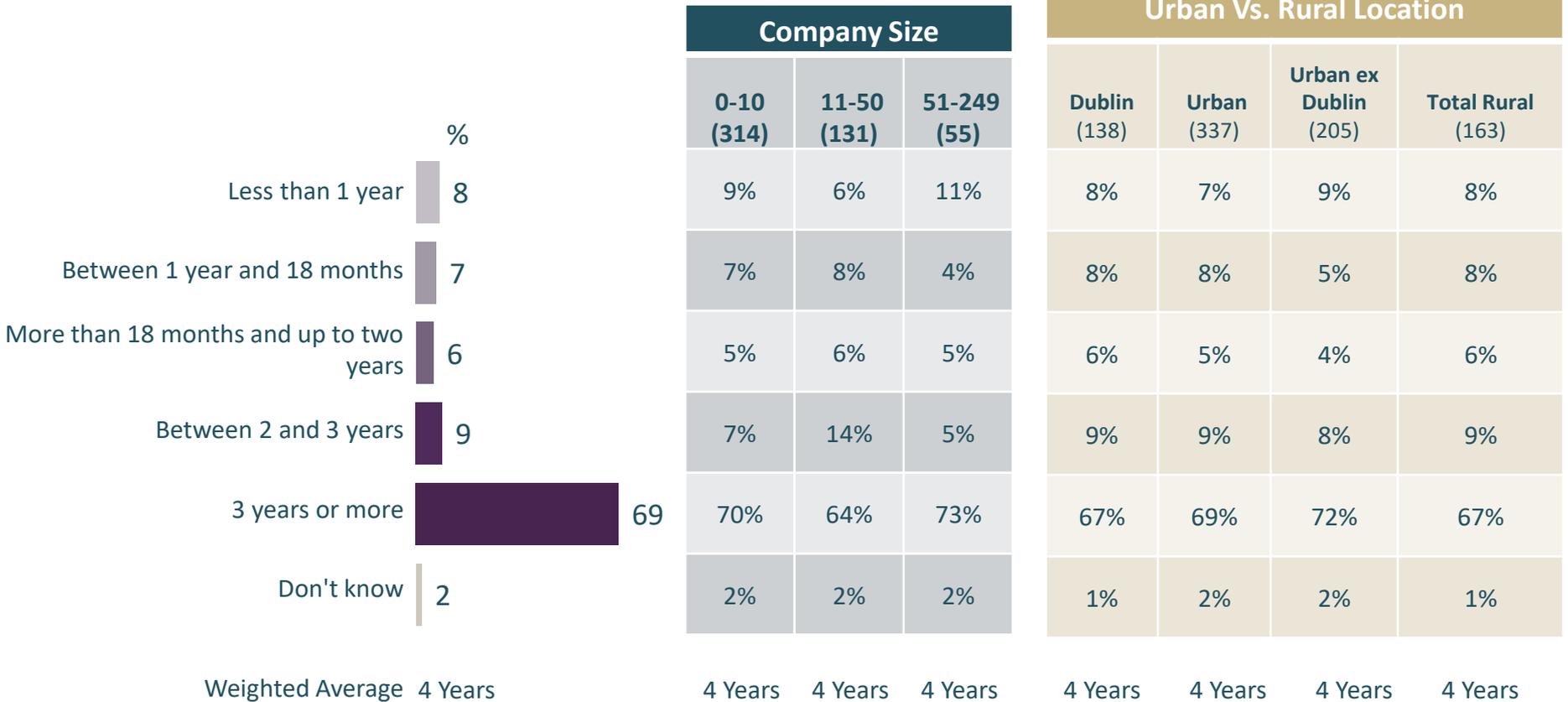


# Mobile Phone Ownership

# Length Of Time With Current Mobile Provider

(Base: All SMEs With Business Mobile Phones; n=500)

Q. How long has your business been with your main mobile provider?



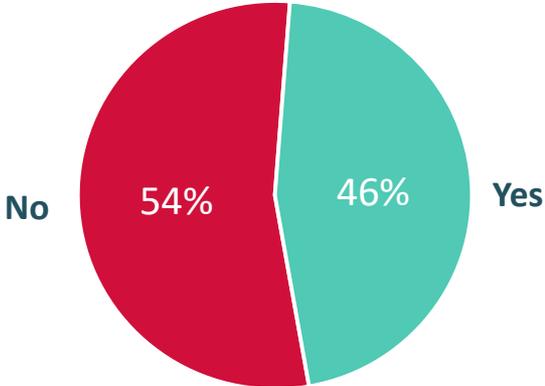
The average length of time that SMEs with business mobile phone in this survey have been with their main mobile provider is 4 years.



# Incidence Of Having A Previous Mobile Provider

(Base: All SMEs With Business Mobile Phones; n=500)

Q. Was your business previously with another mobile phone operator?



	Company Size		
	0-10 (314)	11-50 (131)	51-249 (55*)
Yes	45%	50%	45%
No	55%	50%	55%

Urban Vs. Rural Location			
Dublin (138)	Urban (337)	Urban ex Dublin (205)	Total Rural (163)
52%	47%	44%	44%
48%	53%	56%	56%

\*Small Base Size

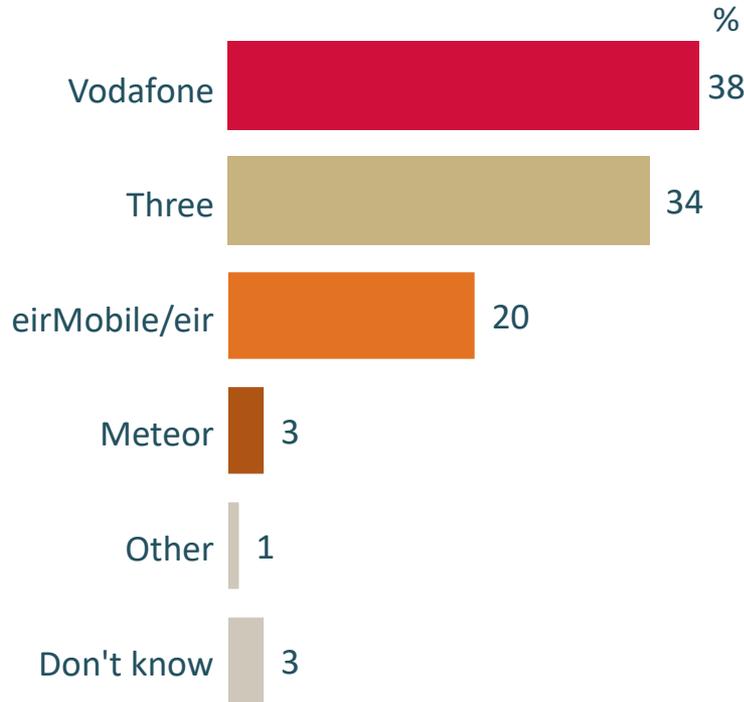
54% of SMEs in this survey with business mobile phones have not previously been with another mobile phone operator, 46% say that they have previously been with a different provider.



# Previous Mobile Provider

(Base: All SMEs With A Previous Mobile Provider, n=231)

Q. Which mobile phone operator was your business previously with?



	Current Supplier		
	Vodafone (104)	Three (74)	eirMobile/eir (47)
Vodafone	0%	72%	68%
Three	62%	0%	23%
eirMobile/eir	30%	18%	0%
Meteor	2%	3%	6%
Other	4%	0%	0%
Don't know	3%	8%	2%

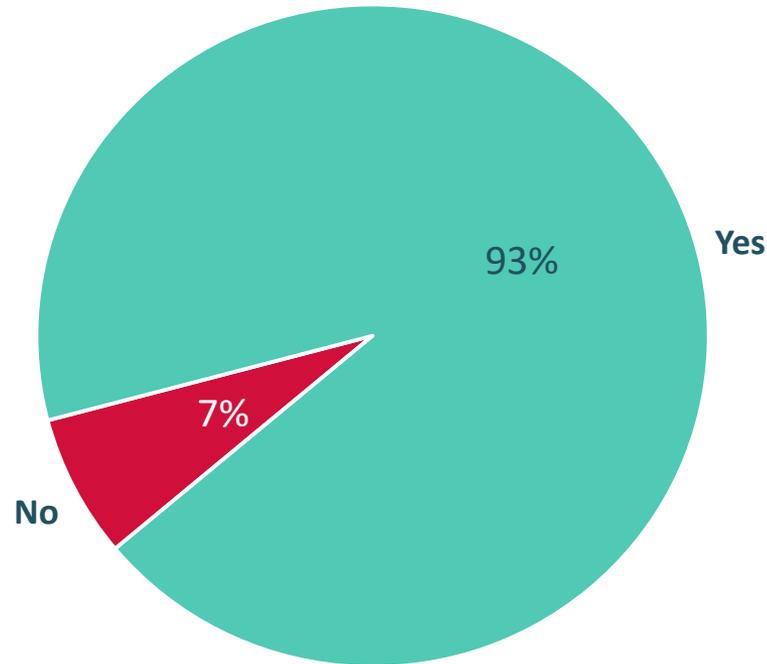
Amongst SMEs that have previously been with a different mobile provider, 38% say that they were previously with Vodafone, while 34% say they were formerly with Three.



# Were You Involved In Decision To Switch Mobile Provider?

(Base: All SMEs With A Previous Mobile Provider, n=231)

Q. Were you involved in the decision to switch mobile phone operator?



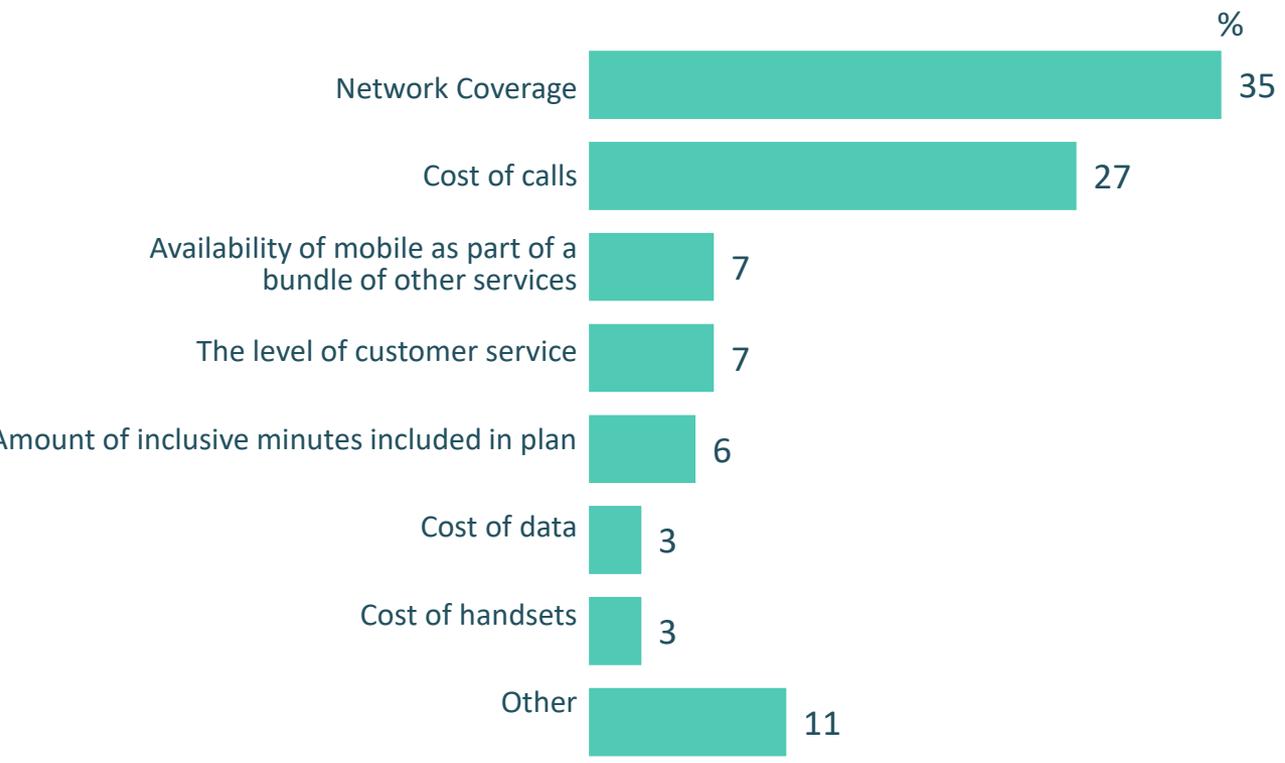
Amongst SMEs that have previously been with another mobile service provider, 93% of the decision makers surveyed say that they were personally involved in the decision to switch provider.



# Most Important Reason in Switching Mobile Provider

(Base: All SME's With A Previous Mobile Provider And Involved In Switch Decision, n=215)

Q. Thinking about when your business last changed mobile operator, please select the main reason out of the following set of possible reasons which were important to the decision to choose that mobile operator



	Current Provider		
	Vodafone (95)	Three (68*)	eir Mobile (47*)
Network Coverage	49%	29%	19%
Cost of calls	22%	28%	36%
Availability of mobile as part of a bundle of other services	7%	6%	9%
The level of customer service	3%	13%	6%
Amount of inclusive minutes included in plan	5%	4%	9%
Cost of data	1%	6%	4%
Cost of handsets	3%	4%	0%
Other	8%	9%	17%

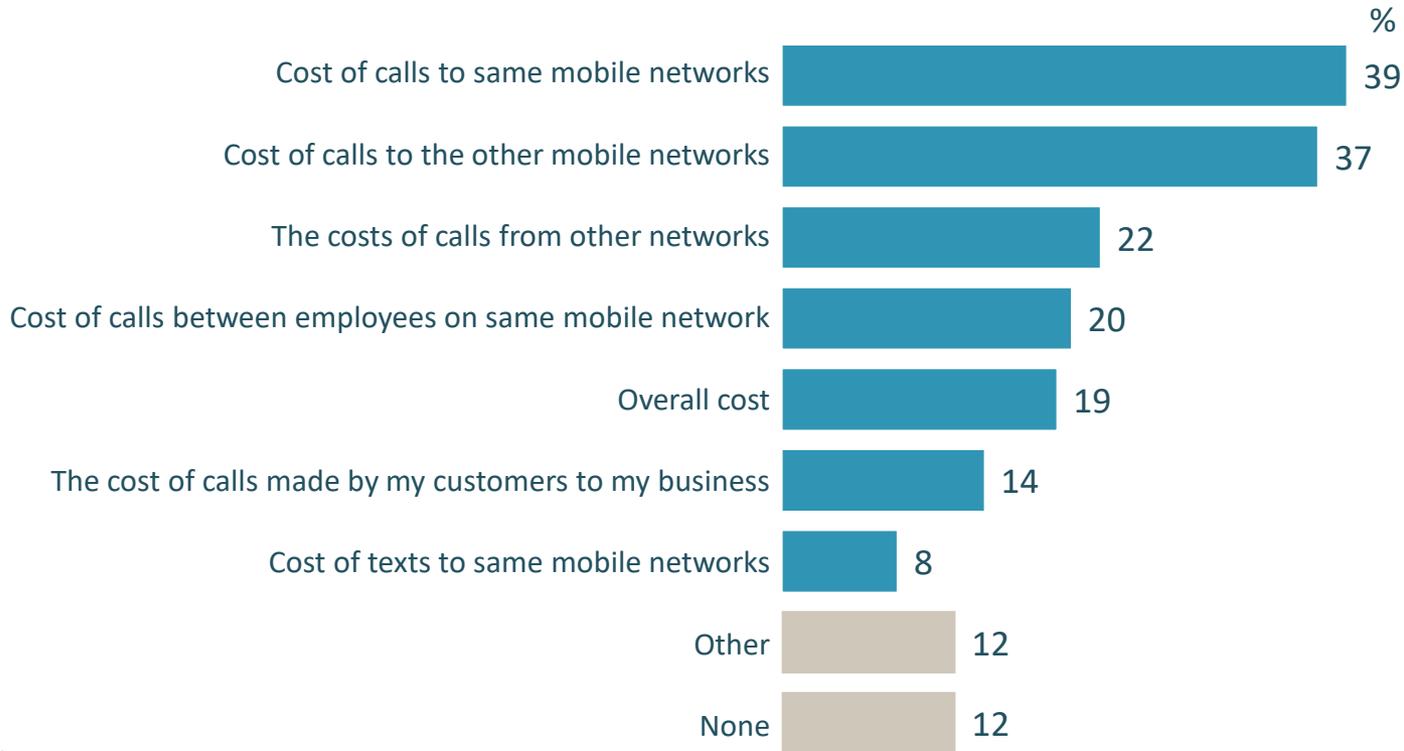
**35% of SMEs in this survey said that network coverage was the main decision in the selection of their current mobile provider.**



# Factors Related To Cost Of Calls When Choosing A Mobile Operator

(Base: All SME's With Cost Of Calls As Important Reason For Choosing A Mobile Operator, n=59\*)

Q. You said that the cost of making calls is the most important factor when choosing a mobile phone operator?  
Can you tell me which aspects in particular are important to your business?



\*Small Base Size

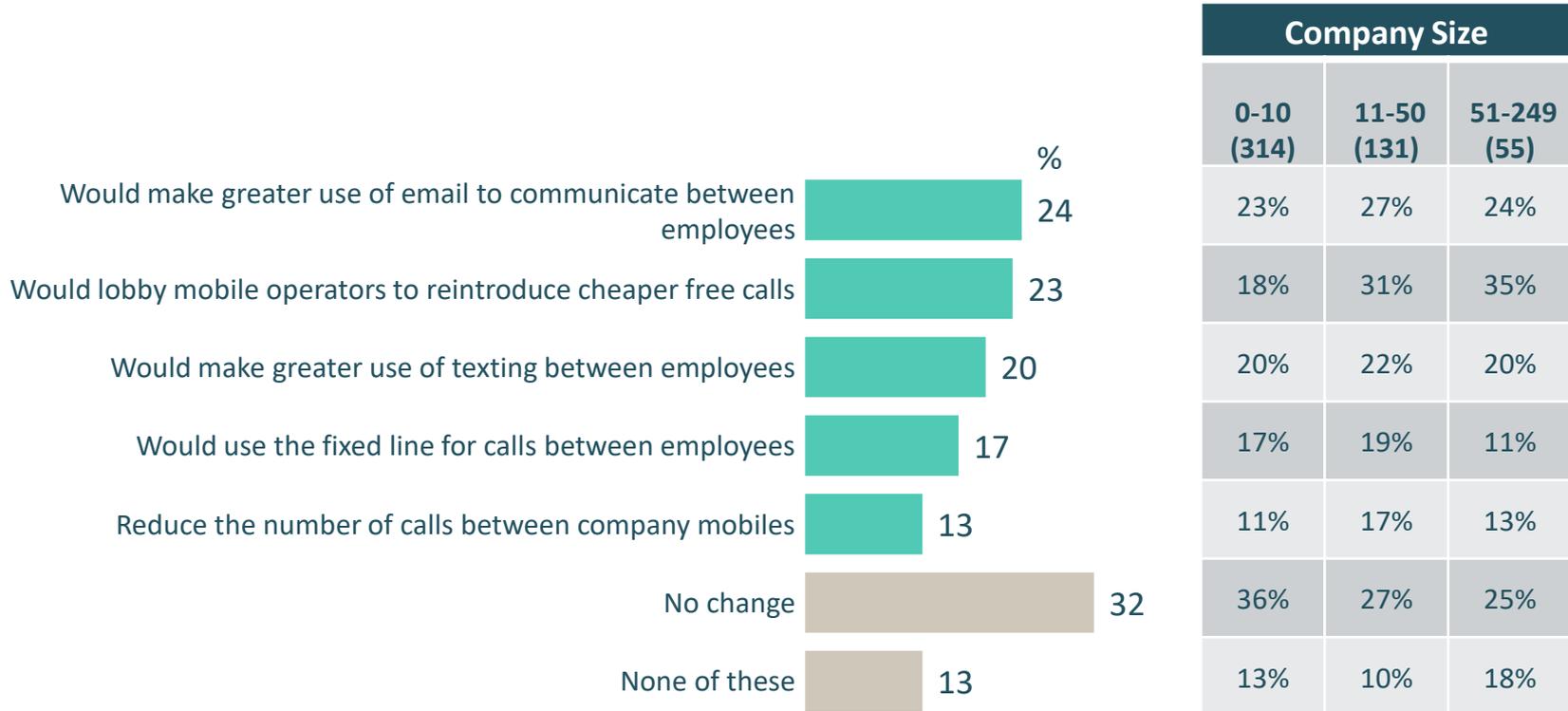
**Amongst SMEs in this survey that claim cost was an important reason for switching mobile phone provider to their current provider, 39% say that the cost of calls to mobiles on the same network was particularly important.**



# Reaction To Changes In Rates And Offers For Calls Between Company Mobiles

(Base: All SMEs With Business Mobile Phones; n=500)

Q. How would your business respond if all mobile operators ceased offering cheaper rates or free calls between your company mobiles? Please select any of the following statements which apply



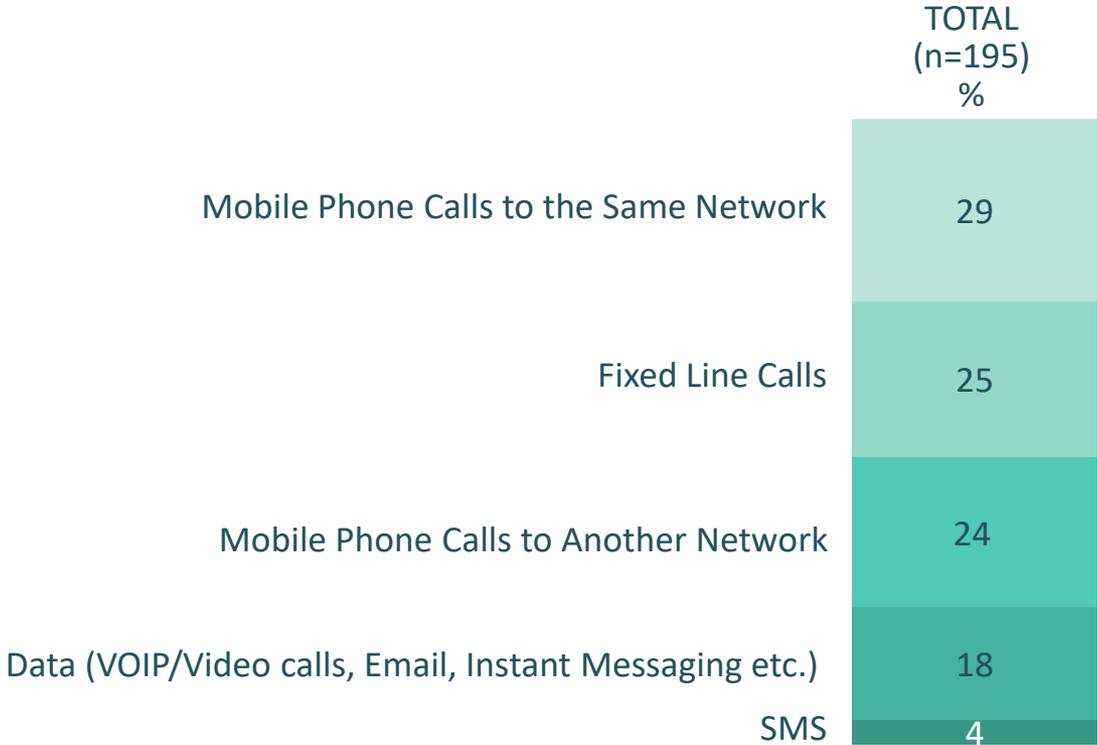
If mobile operators cease offering cheaper rates, 24% of SMEs surveyed said they would make greater use of email to communicate, however, 32% would make no changes.



# Breakdown of Outbound Communication

(Base: All SMEs With Business Mobile Phones with know network; n=195)

*Q. Please estimate the percentage breakdown of the outbound communication (where your business is making contact rather than someone contacting the business).*



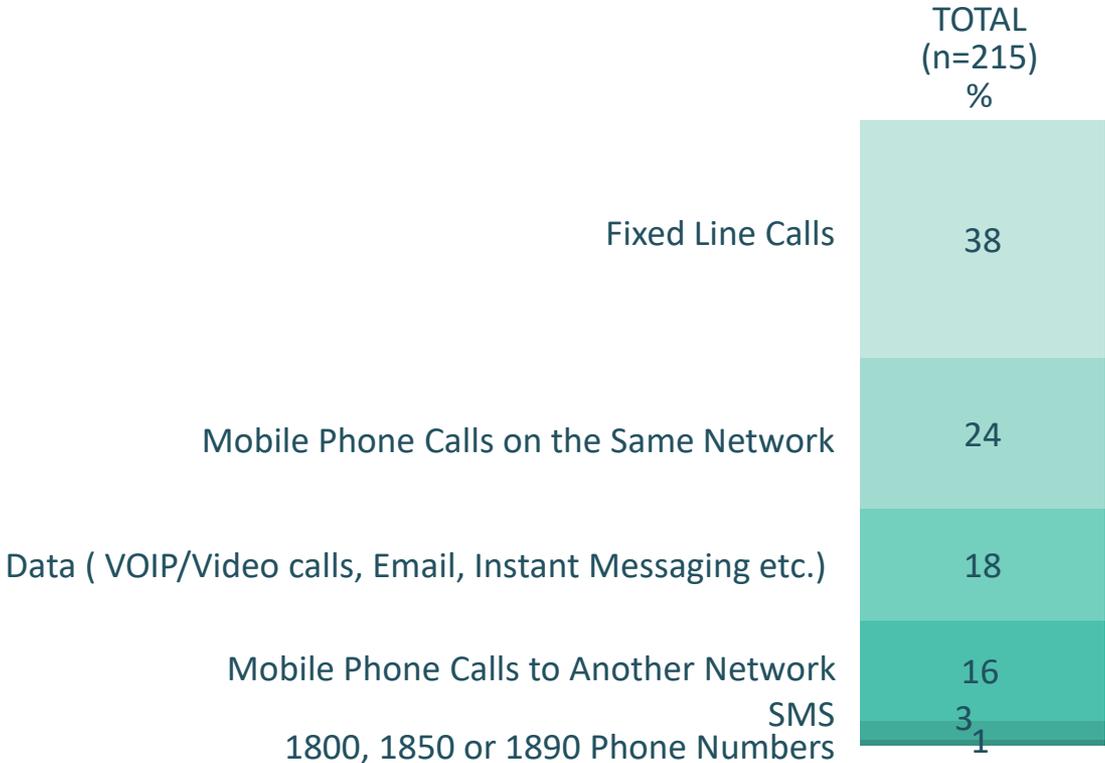
**More than half of outbound communication calls among the SMEs surveyed is through mobile phone calls (to the same and different networks), while 25% is through fixed line calls.**



# Breakdown of Inbound Communication

(Base: All SMEs With Business Mobile Phones who know identity of incoming call; n=215)

*Q. Thinking of the different ways which potential customers communicate with you, can you estimate the percentage breakdown of this inbound communication?*



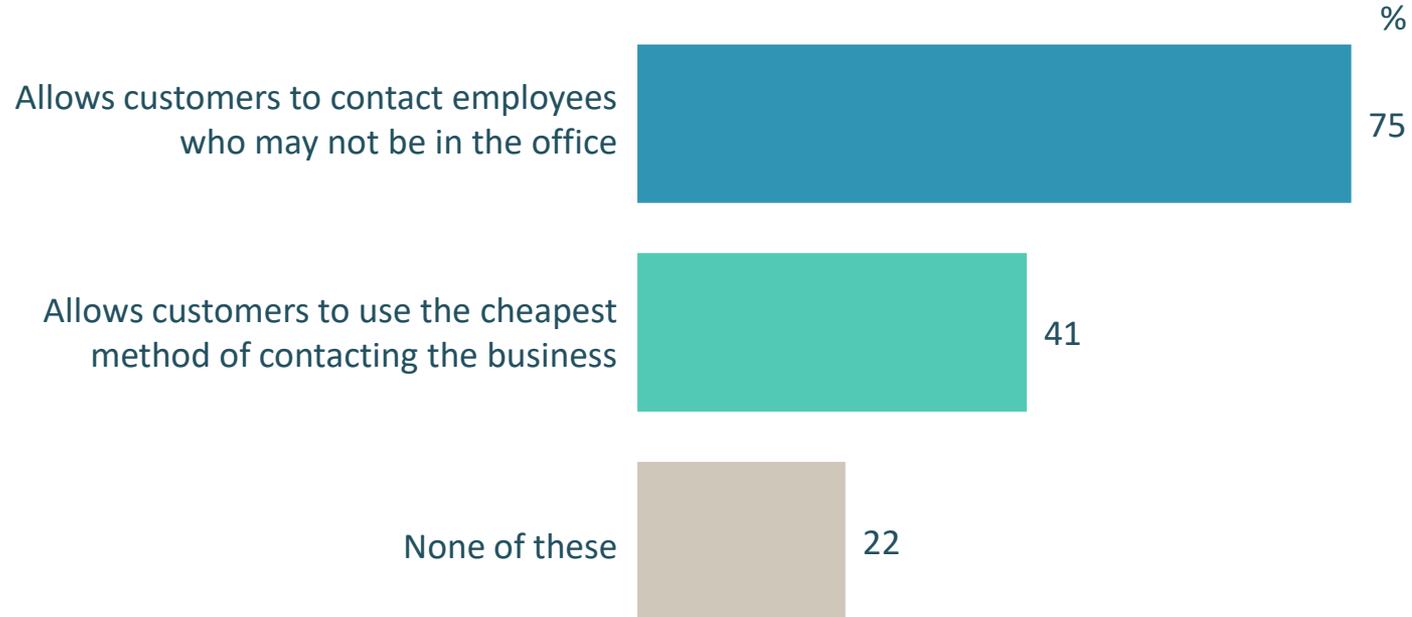
**In relation to inbound communication to SMEs surveyed 38% of calls received from customers on fixed line services while 40% is through mobile (same and other network).**



# Reason For Receiving Calls On Fixed & Mobile Phone Numbers

(Base: All Who Receive Incoming Calls On Mobile Phone Numbers, n=128)

Q. You have stated that you receive incoming calls on both fixed and mobile phone numbers. Why do you use both? Is it because...



Of the SMEs surveyed who use receive calls on both fixed and mobile numbers, 75% say they do so because it allows customers to contact employees who may not be in the office, while 41% want to allow customers to choose the cheapest option when contacting the business.



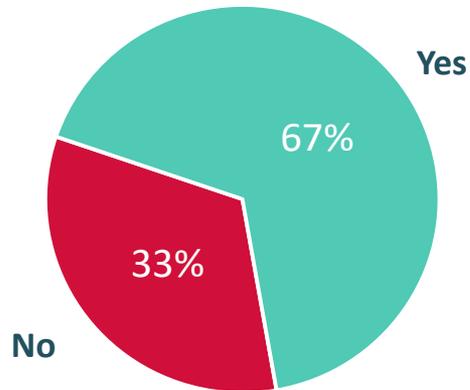


**Mobile Phone  
For Business Purpose  
(Person Level)**

# Do You Own A Mobile Phone For Business Purposes

(Base: All SMEs With Business Mobile Phones; n=500)

Q. Do you have a mobile phone provided by the business for work purposes?



	Company Size		
	0-10 (314)	11-50 (131)	51-249 (55)
Yes	70%	59%	65%
No	30%	41%	35%

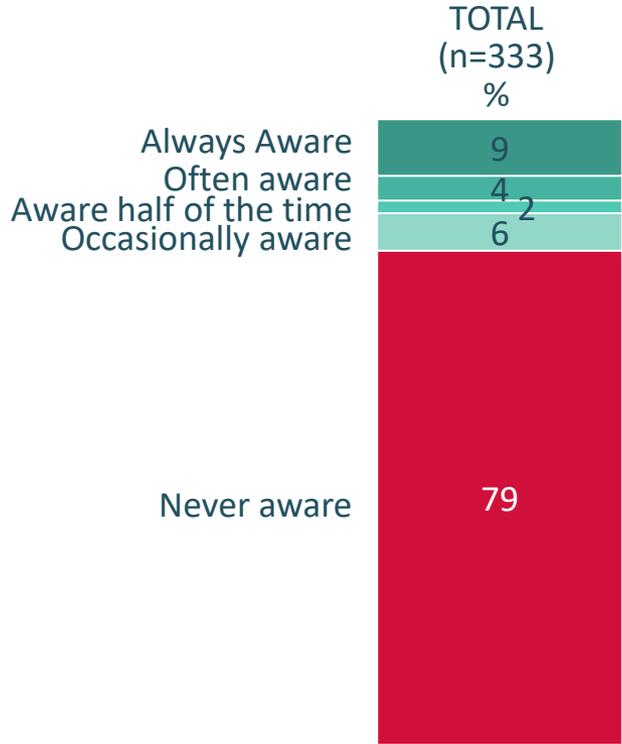
Of the SMEs surveyed, 67% of telecommunication decision makers who took part in the survey report having a mobile phone provided by the business.



# Awareness Of Network Calling

(Base: All Who Have Mobile Phone Provided By The Business For Work Purposes; n=333)

Q. When you are making calls from your business mobile phone, to what extent are you aware of which mobile network you are calling?



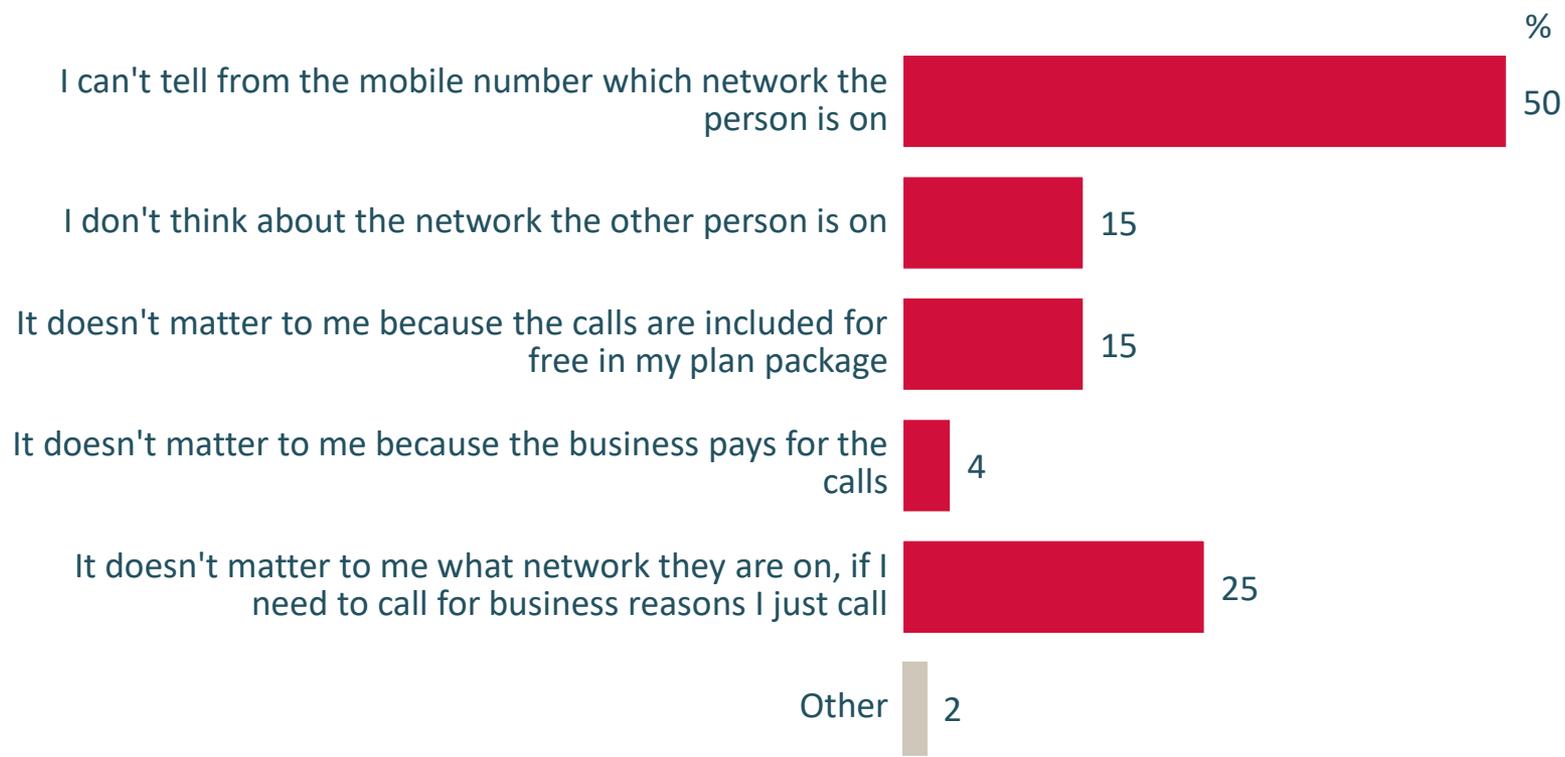
**79% of telecommunication decision makers surveyed who are supplied with a business mobile phone report not being aware of which network the mobile number they call belongs to.**



# Reason For Not Being Aware Of Network Calling

(Base: All SME's With Business Mobile Phones Who Are Not Aware Of Network Being Called, n=303)

Q. Could you explain why you are not always aware of the mobile network you are calling?



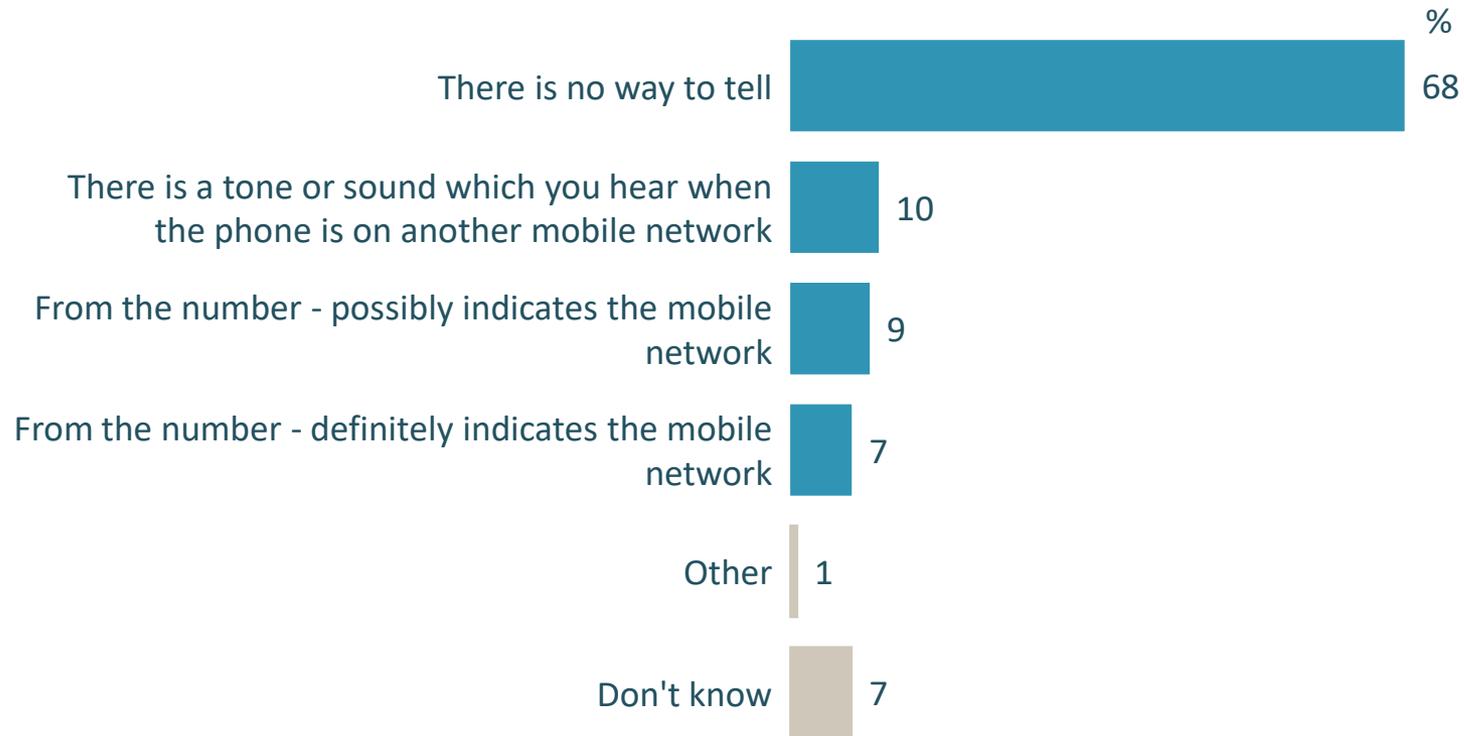
**25% say they are not aware of network calling as if they need to make a business call they just make it.**



# Method Of Knowing If Someone Is Calling On Another Mobile Network

(Base: All Who Have Mobile Phone Provided By The Business For Work Purposes; n=333)

Q. Are there any ways that you can tell if the number you are calling is on another mobile network



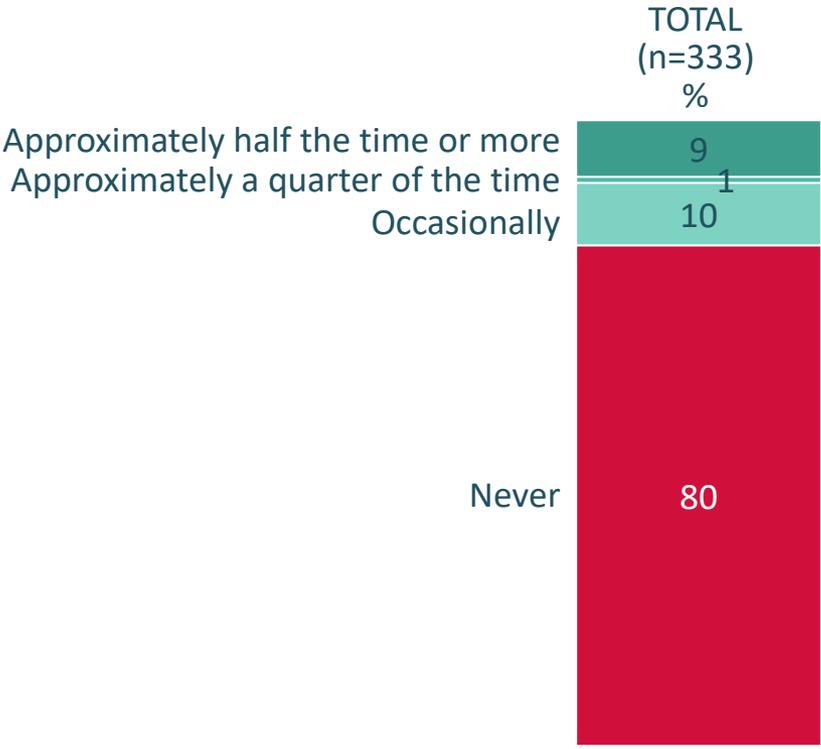
**68% of the telecommunication decision makers surveyed believe there is no way to tell which network the number being called belongs to.**



# Amount Of Time Spend Thinking About Costs Of Call

(Base: All Who Have Mobile Phone Provided By The Business For Work Purposes; n=333)

Q. When making a call from your business mobile to another mobile network, how often do you think about the cost of the call?



**80% of those surveyed say they never think about cost of the call when calling from their business mobile phone to another mobile network.**

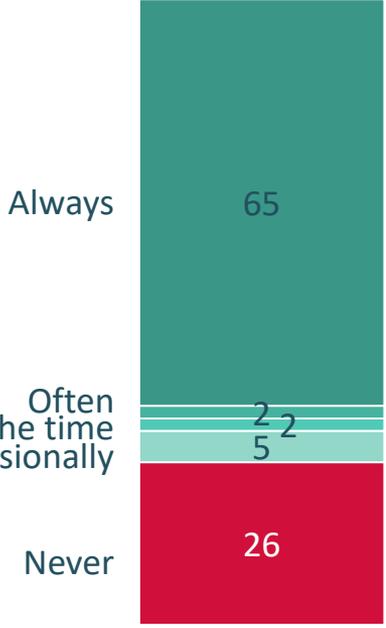


# Awareness If The Number Being Called Is A Fixed Line Phone

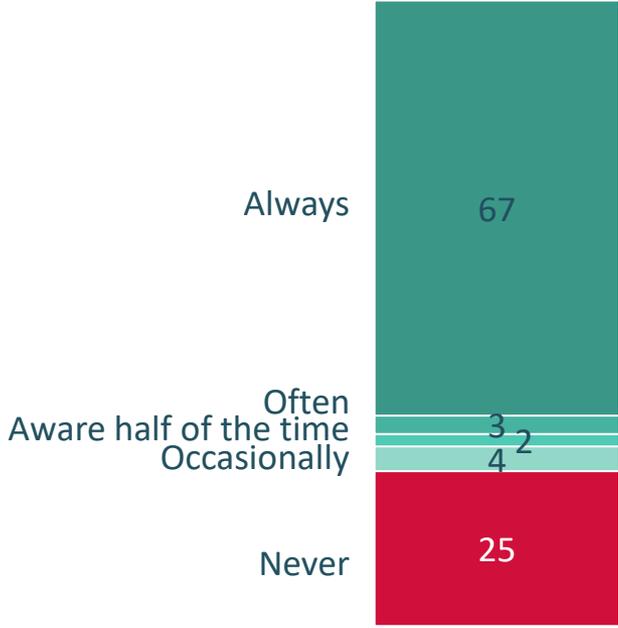
(Base: All Who Have Mobile Phone Provided By The Business For Work Purposes; n=333)

Q. When you are calling from your business supplied mobile phone, to what extent are you aware whether the number you are calling is a fixed line phone?

All With Mobile Phone Provided by Business (n=333)  
%



All With Fixed Phone and Mobile Phone (n=296)  
%



65% of those surveyed say they are always aware when dialling a fixed line number, while 1 in 4 say they would never be aware.



# Reason For Not Being Aware If Number Called Is A Fixed Line

(Base: All Who Are Not Always Aware If Phone Is A Fixed Line, n=116)

Q. Why are you not always aware?



Of those surveyed who say they are not always aware of whether the number they are calling is a fixed line, 44% say this is because it does not matter to them because if they need to call a number for business they just call.



# Particular Calls That Are Concerning

(Base: All Who Have Mobile Phone Provided By The Business For Work Purposes; n=333)

Q. Are there any particular types of phone calls that you personally are concerned about making when considering the cost of a call from your business supplied mobile phone?



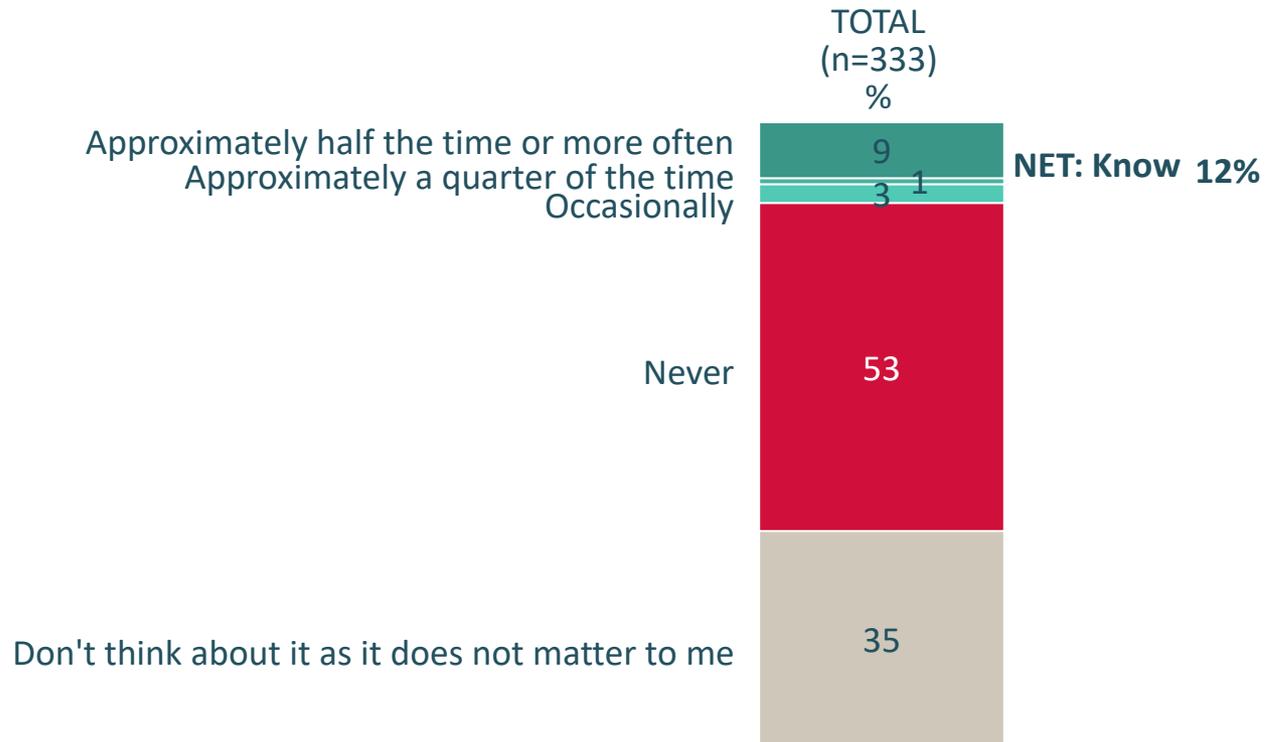
According to those surveyed, telecommunication decision makers are mostly concerned about cost of calls to international numbers (36%), calls to premium numbers (20%) and calls to Freephone numbers (20%). However, 41% say they are not concerned about any type of cost as the business pays for them.



# Awareness Of Mobile Network Of Incoming Mobile Call

(Base: All Who Have Mobile Phone Provided By The Business For Work Purposes; n=333)

Q. If someone is calling you on your business supplied mobile, to what extent do you know which mobile network they are calling from?



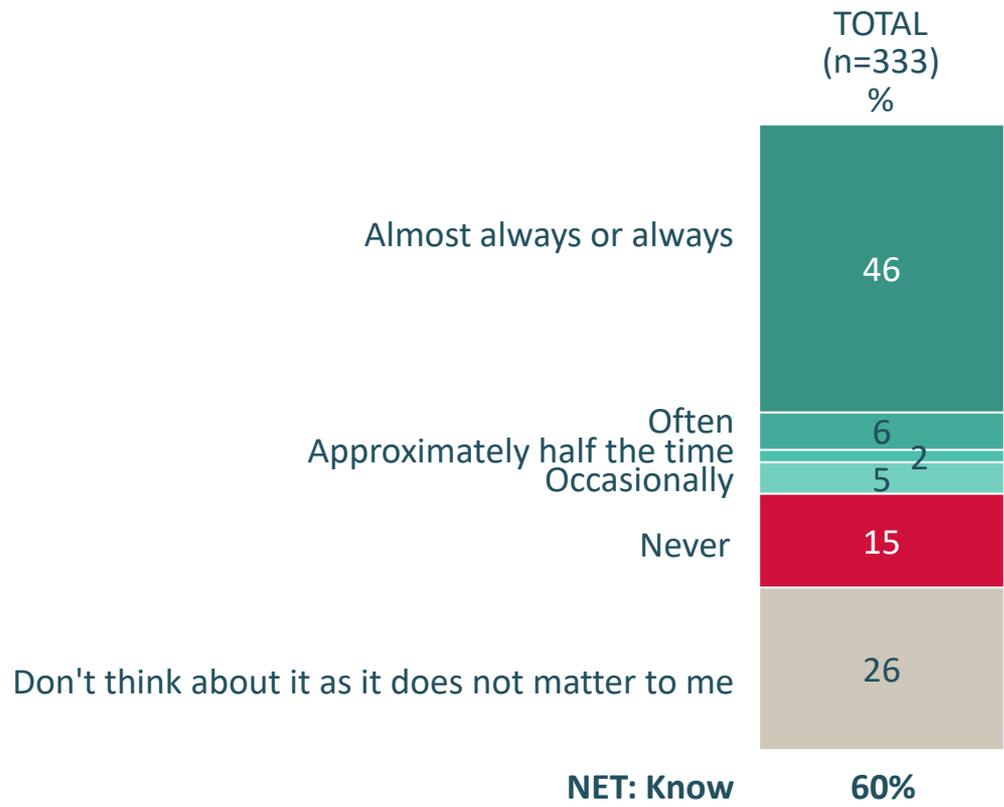
53% of those surveyed say that when receiving calls on their business mobile network, they never know what mobile network the caller belongs to.



# Awareness If Call Incoming Coming On Mobile Phone Is From Mobile Or Fixed Line

(Base: All Who Have Mobile Phone Provided By The Business For Work Purposes; n=333)

Q. If someone is calling you on your business supplied mobile, to what extent would you know if they are calling from a fixed line network or a mobile network?



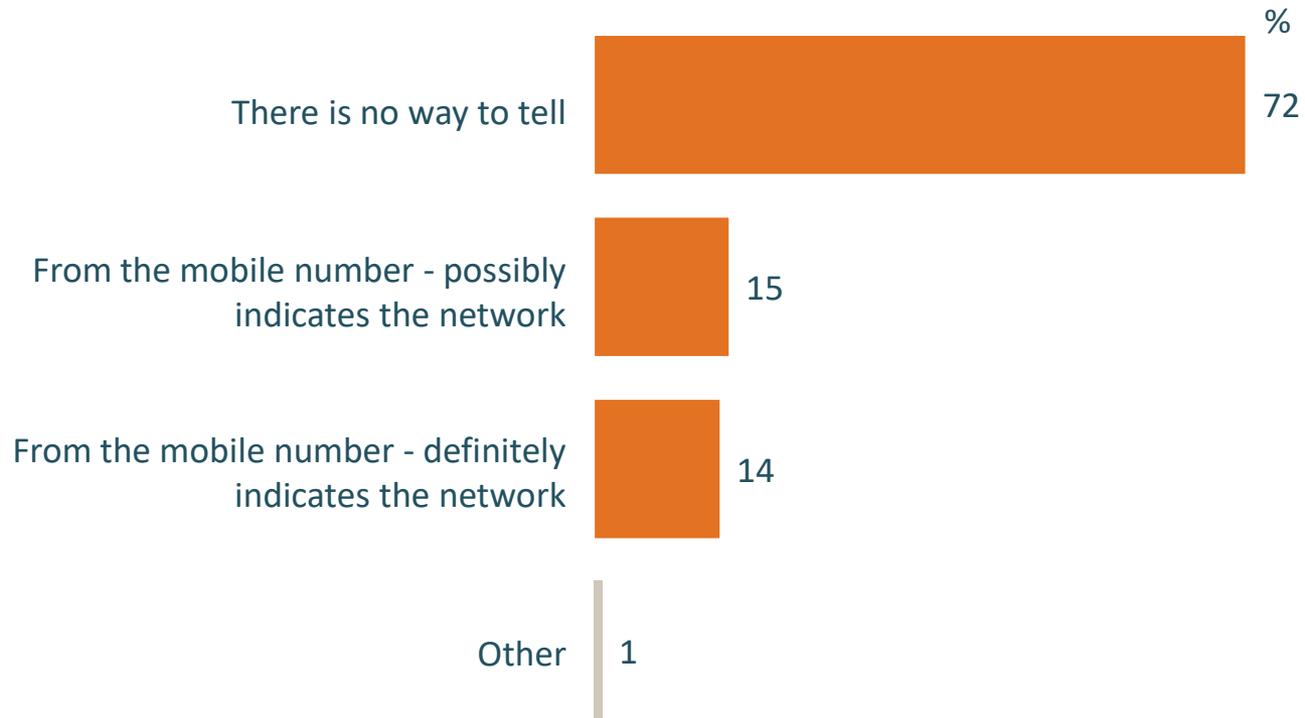
**60% of telecommunication decision makers who are provided with a business mobile in the survey report that when receiving a call they know whether it is from a fixed or mobile network.**



# Method Of Knowing If Someone Is Calling On A Particular Mobile Network

(Base: All Who Have Mobile Phone Provided By The Business For Work Purposes; n=333)

Q. Are there any ways that you can tell what mobile network the person calling you is on?



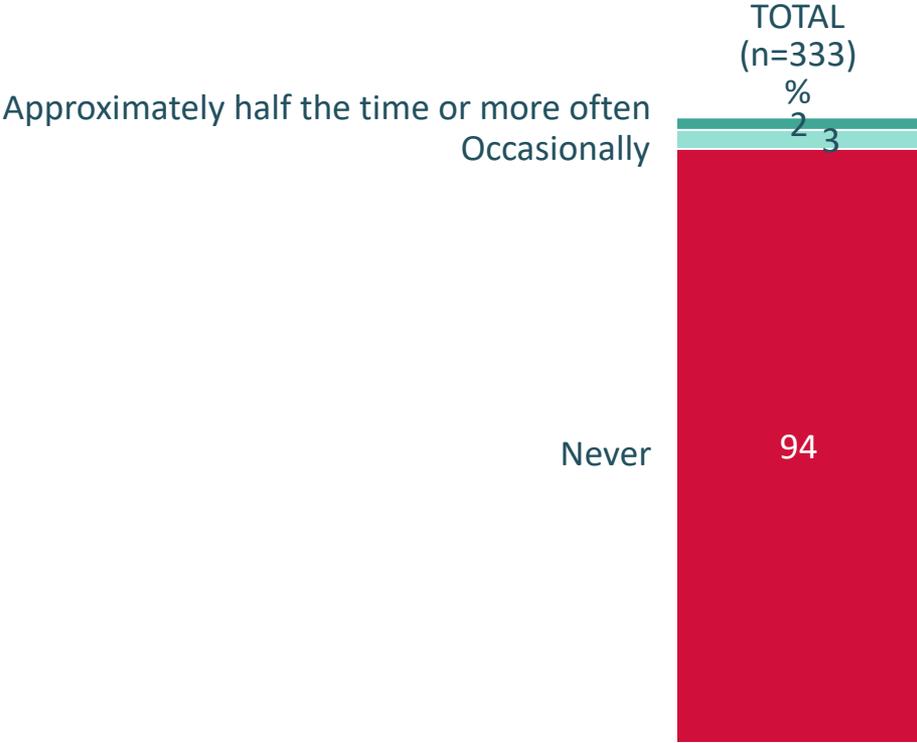
**72% of those surveyed believe there is no way to tell which mobile network a number calling them belongs to.**



# Consideration Of Cost To The Person Making The Phone Call To You

(Base: All Who Have Mobile Phone Provided By The Business For Work Purposes; n=333)

Q. When you see an incoming call on your business supplied mobile, do you consider what the call will cost the person calling?



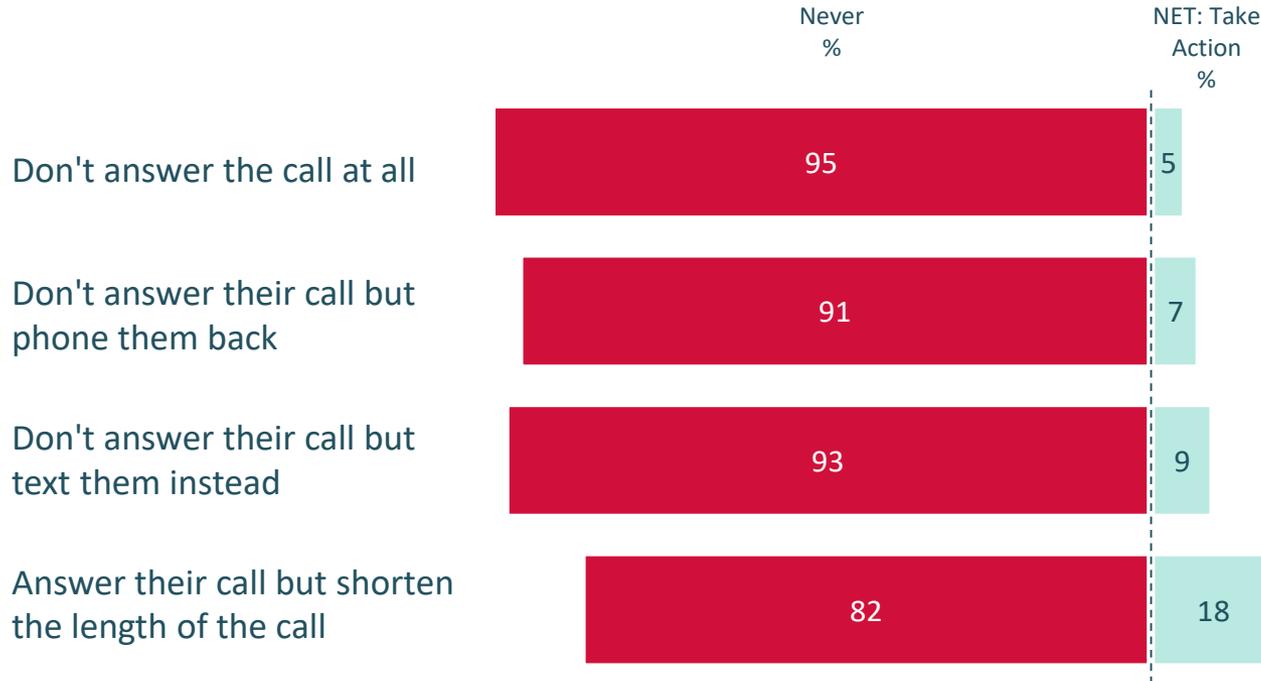
**94% of those surveyed say when receiving a call they would never consider the cost to the person making the call**



# Action Taken When Caller Is On Another Network: Summary

(Base: All Who Have Mobile Phone Provided By The Business For Work Purposes; n=333)

Q. When you are aware that the caller is on another network, do you take any of the following actions?



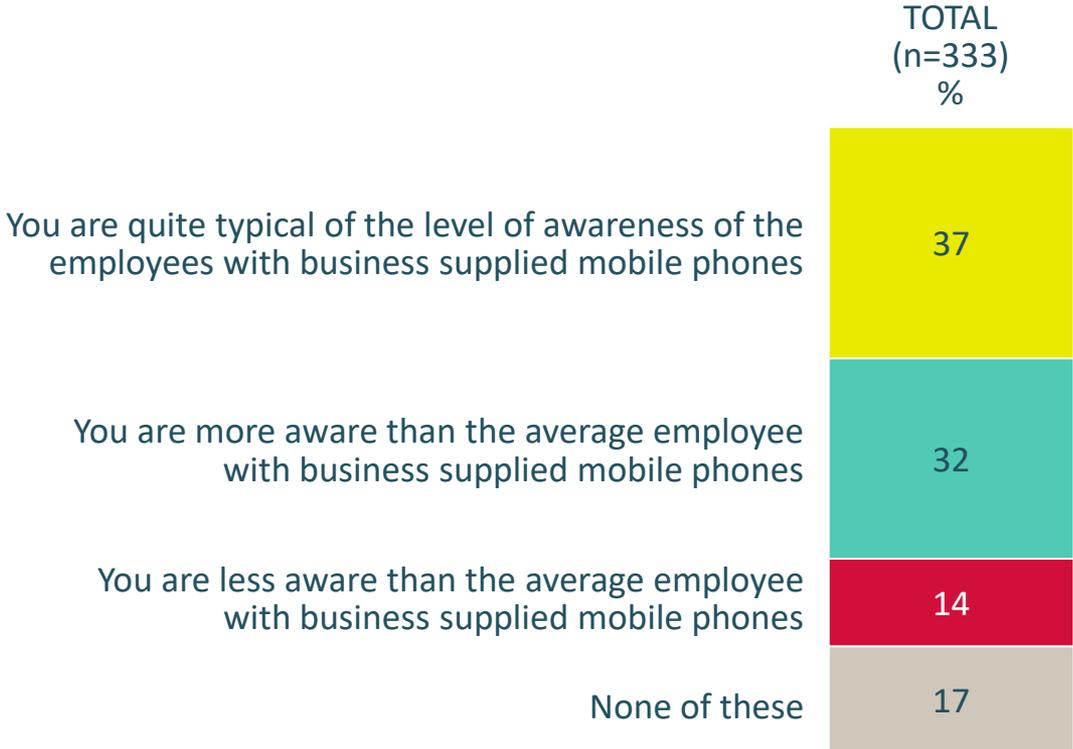
**18% say they would try and shorten the length of the call, while 9% say they might not answer the call and text the person instead when they are aware that the caller is on another network**



# Level Of Awareness For Employees With Business Mobile Phones

(Base: All Who Have Mobile Phone Provided By The Business For Work Purposes; n=333)

Q. Thinking about your responses to the previous questions, do you think that...



69% of respondents to the survey had the same level of awareness or more awareness of caller network identity than the average employee.



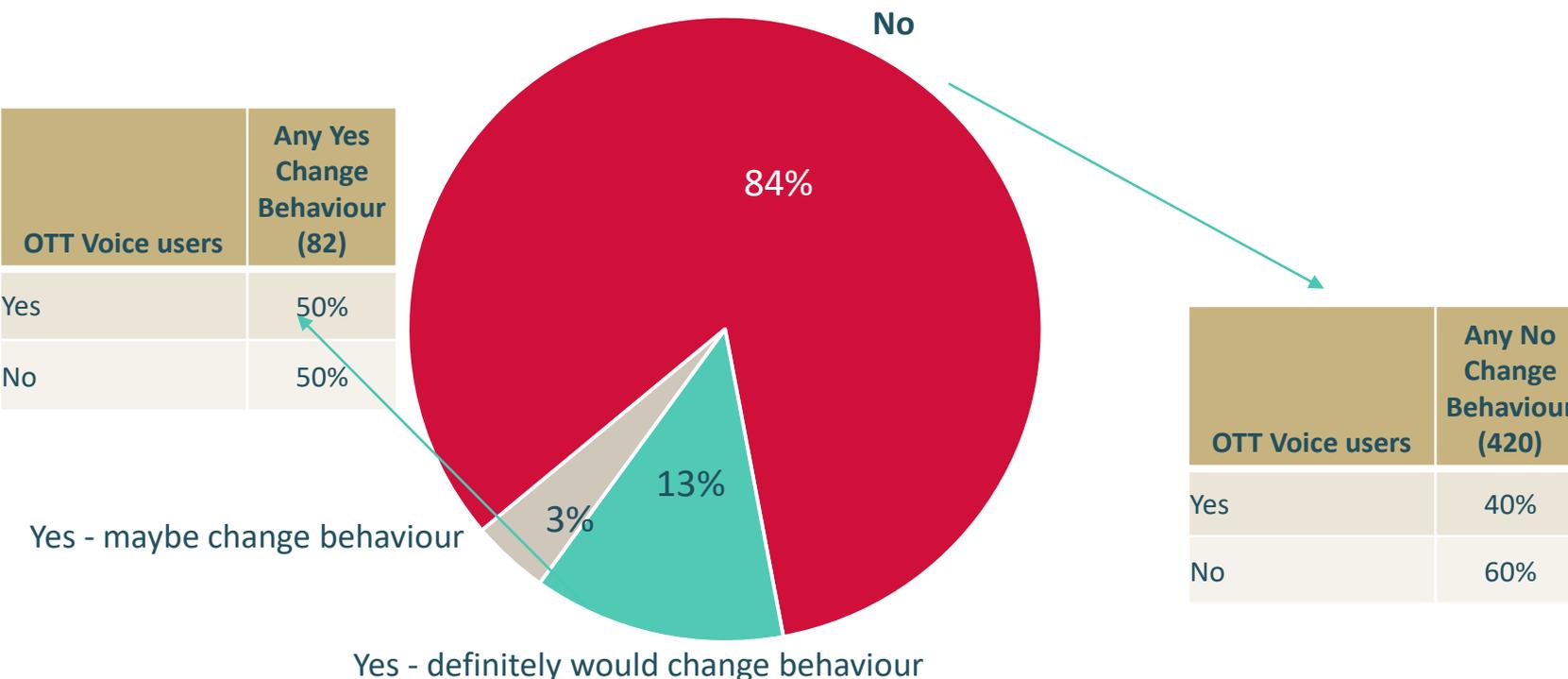


**SSNIP**

# Change Behaviour If Call Price Increased By 1 Cent Per Min - Mobile

(Base: All SME's With Business Mobile Phones, n=500)

Q. Imagine if the cost of calling **another mobile network** from your business mobile phone increased by 1 cent...  
As a consequence of this 1 cent per minute increase, do you believe that it would have an impact on how your business communicates with its customers?



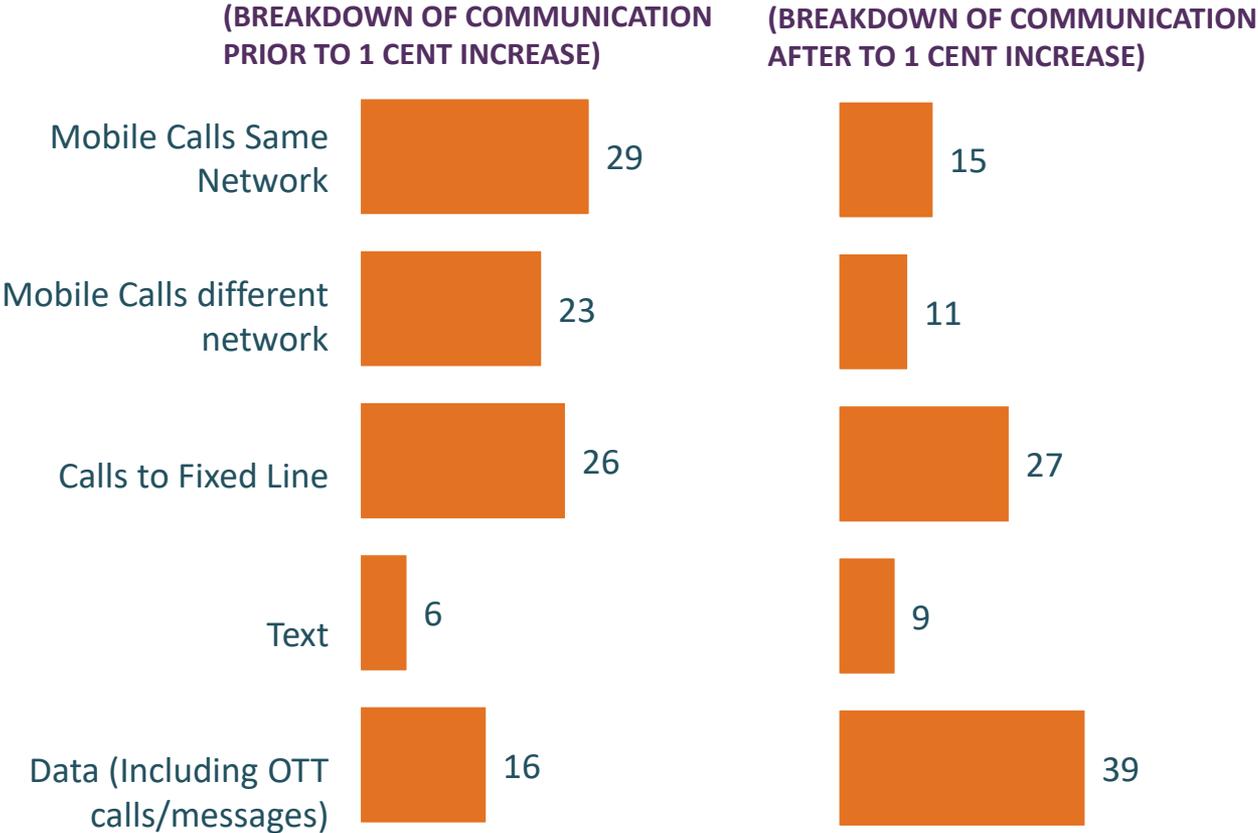
In the hypothetical scenario where cost of calls to mobile phones increases by 1 cent per minute, 84% of the SMEs surveyed say that this would not change how their business communicates with customers.



# Change Behaviour If Call Price Increased By 1 Cent Per Min - Mobile

(Base: All SME's Likely to Definitely Change Behaviour -65)

Q. If the price of calling another mobile network increased by 1 CENT, how if at all, would this impact the percentage breakdown of how your company engages in outbound communication ?



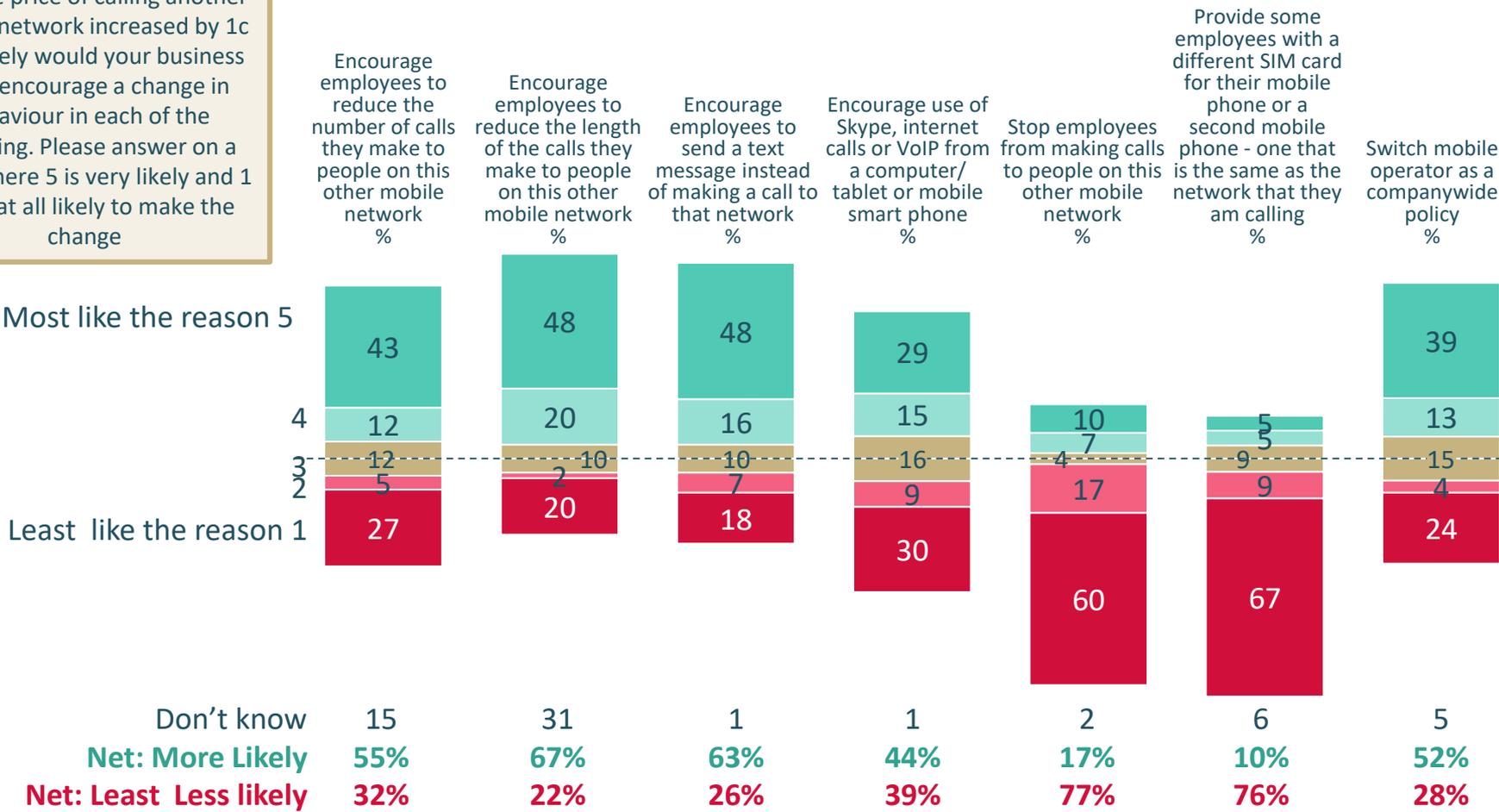
When 1 cent price increase to a different mobile network was suggested the proportional share of mobile calls would fall while data increases.



# Likelihood Of An Impact If Increased By 1c To Mobiles: Summary

(Base: All SMEs With Business Mobile Phones who would make a change; n=82)

Q. If the price of calling another mobile network increased by 1c how likely would your business be to encourage a change in behaviour in each of the following. Please answer on a scale where 5 is very likely and 1 is not at all likely to make the change



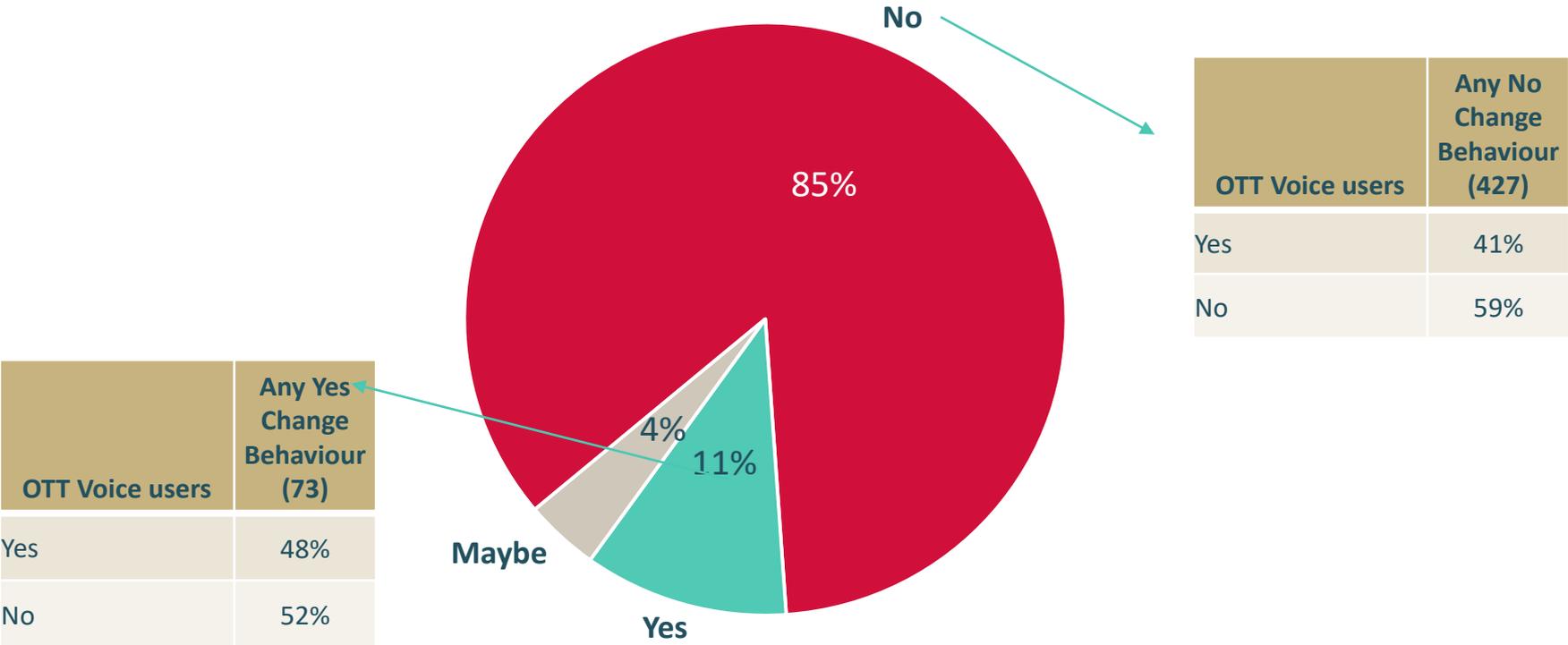
Of those SMEs surveyed who would make a change in the event of a 1 cent per minute increase of cost to call mobiles, the most likely action to take would be encouraging employees to reduce the length of calls (67%), send text messages instead (63%) or switch mobile operators (52%).



# Change Behaviour If Call Price Increased By 1 Cent Per Min – Mobile to Fixed

(Base: All SME's With Business Mobile Phones, n=500)

Now I want you to imagine if the per minute cost of **calling someone on a fixed line** from your business's mobile phone increased by 1 cent....  
 Q. As a consequence of this 1 CENT per minute increase in the cost of making calls to fixed lines from your mobile network, do you believe that it would have an impact on how your business communicates with its customers?



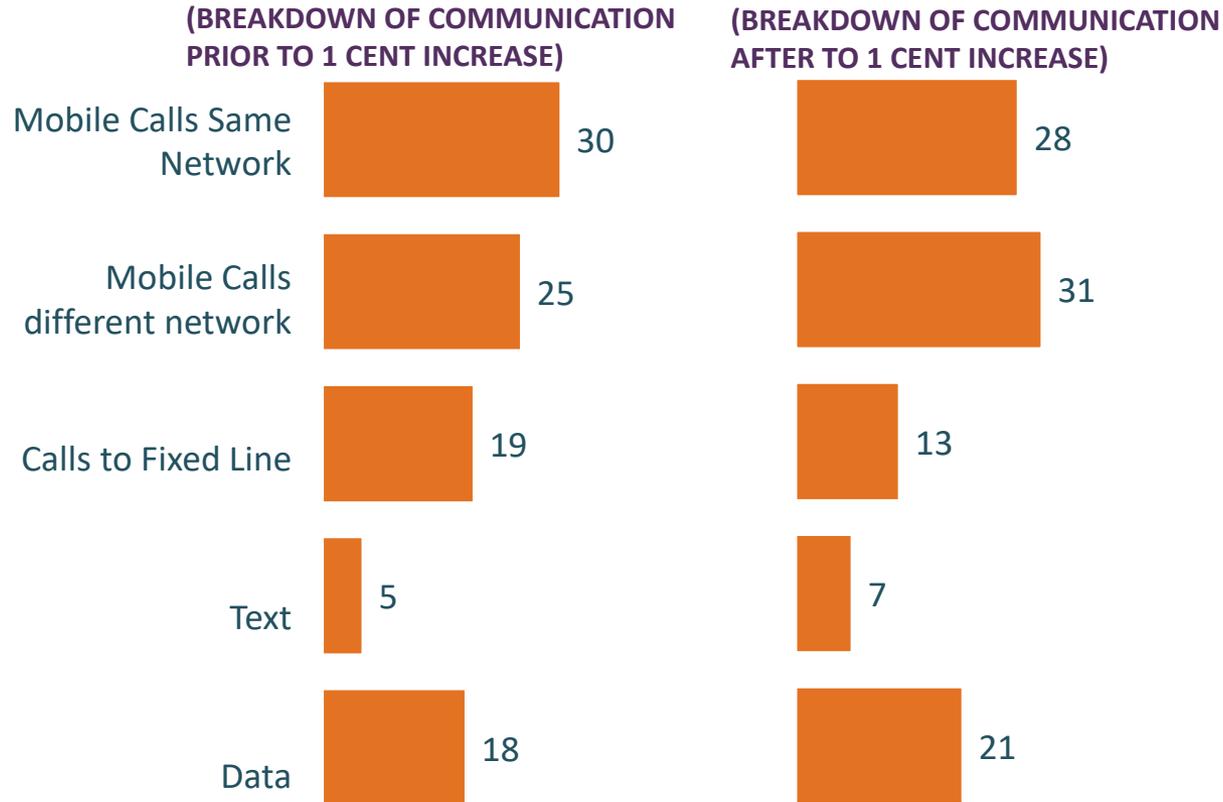
In the hypothetical scenario where cost of calls to fixed line phones increases by 1 cent per minute, 85% of the SMEs surveyed say that this would not change how their business communicates with customers.



# Change Behaviour If Call Price Increased By 1 Cent Per Min To Fixed Line

(Base: All SME's Likely to Definitely Change Behaviour -55)

Q. If the price of calling a fixed line from your business mobile network increased by 1 Cent, how if at all, would this impact the percentage breakdown of how your company engages in outbound communication ? ?



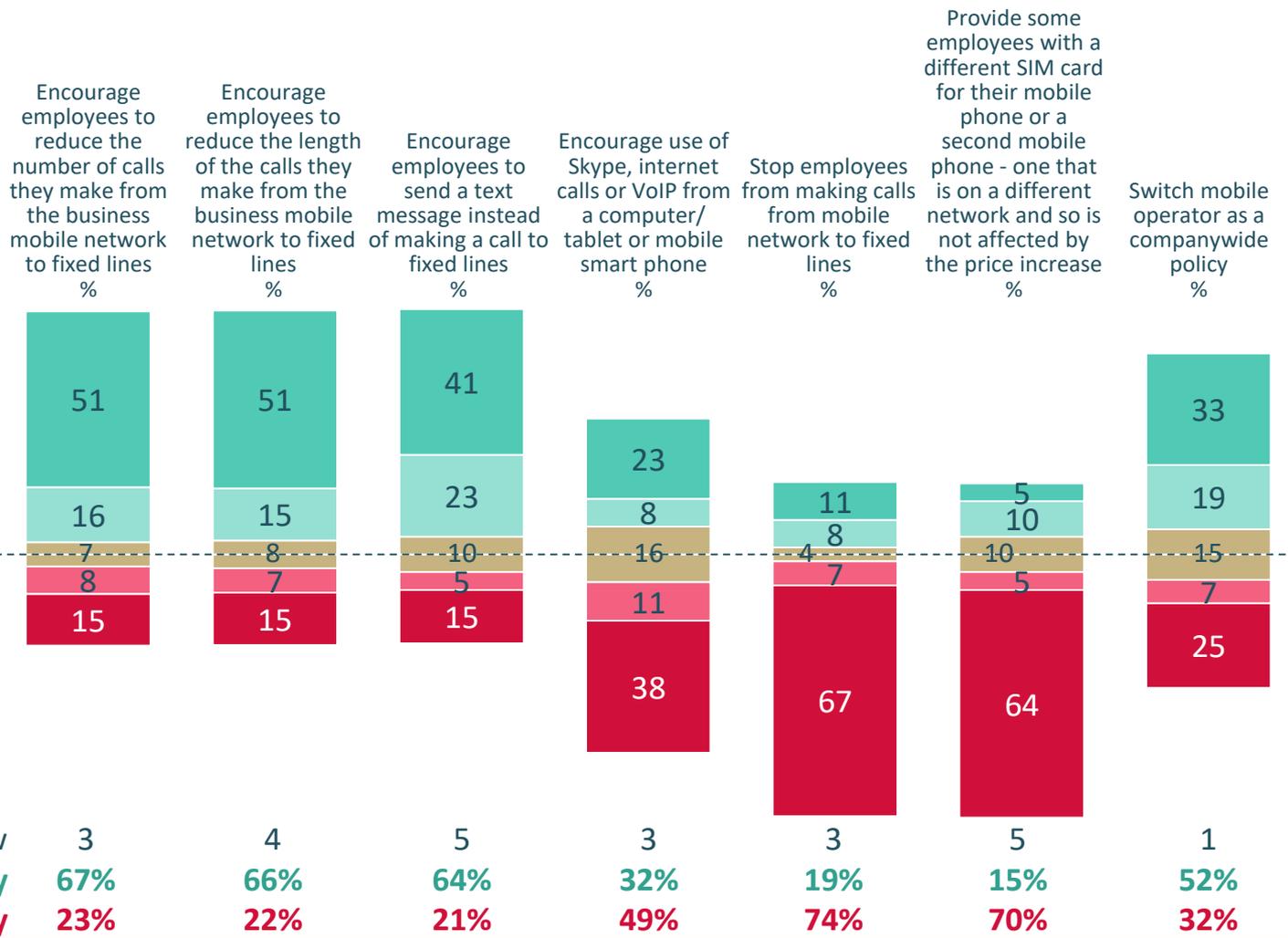
When 1 cent increase applies to fixed line proportional share of fixed line calls falls with calls to mobile on a different network and data increasing based on estimates on those claiming they would change their behaviour.



# Change In Behaviours As A Result Of An Increase Of 1c To A Fixed Line: Summary

(Base: All SMEs With Business Mobile Phones who would make a change; n=73)

Q. If the price of calling a fixed line from your business mobile increased by 1 Cent how likely would your business be to encourage a change in behaviour in each of the following. Please answer on a scale where 5 is very likely and 1 is not at all likely to make the change



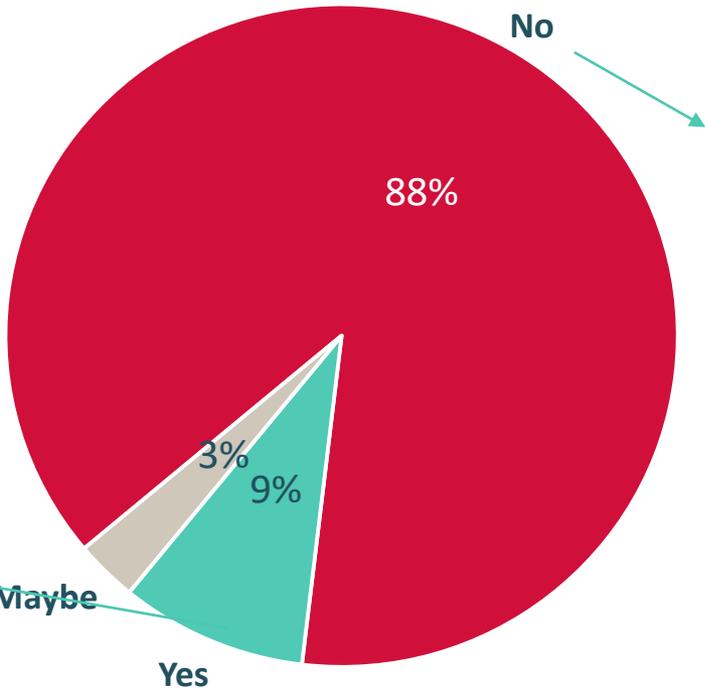
Of those SMEs who would make a change in the event of a 1 cent per minute increase of cost to call mobiles from fixed line phones, would do so by encouraging employees to reduce the number of calls (67%), reduce the length of calls (66%) or encourage employees to send text messages (64%).



# Consequence Of Increasing Cost By 1c To Mobiles From Fixed Line Office Phone Operator

(Base: All SME's With Business Mobile Phones, n=500)

Q. As a consequence of this 1 CENT increase on the price of a call from an office fixed line phone to a particular mobile operators' network, do you believe that your business would change the way it communicates with its customers?



OTT Voice users	Any Yes Change Behaviour (60)
Yes	47%
No	53%

OTT Voice users	Any No Change Behaviour (440)
Yes	41%
No	59%

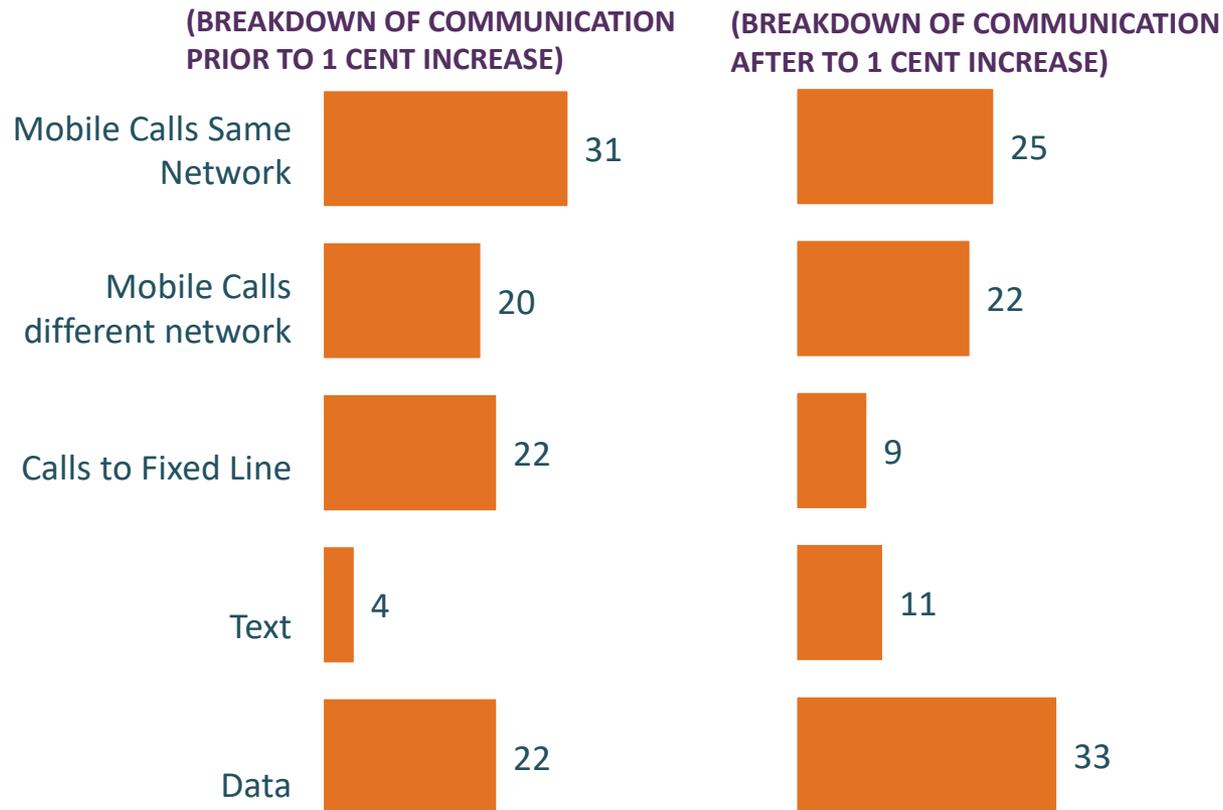
In the hypothetical scenario where cost of calls from fixed line to mobile phones increases by 1 cent per minute, 88% of the SMEs surveyed say that this would not change how their business communicates with customers.



# Change Behaviour If Call Price Increased By 1 Cent Per Min (Mobile from Fixed)

(Base: All SME's Likely to Definitely Change Behaviour - 45)

Q. If the price of calling a particular mobile network from a fixed line increased by 1 Cent, how if at all, would this impact the percentage breakdown of how your company engages in outbound communication ? ?



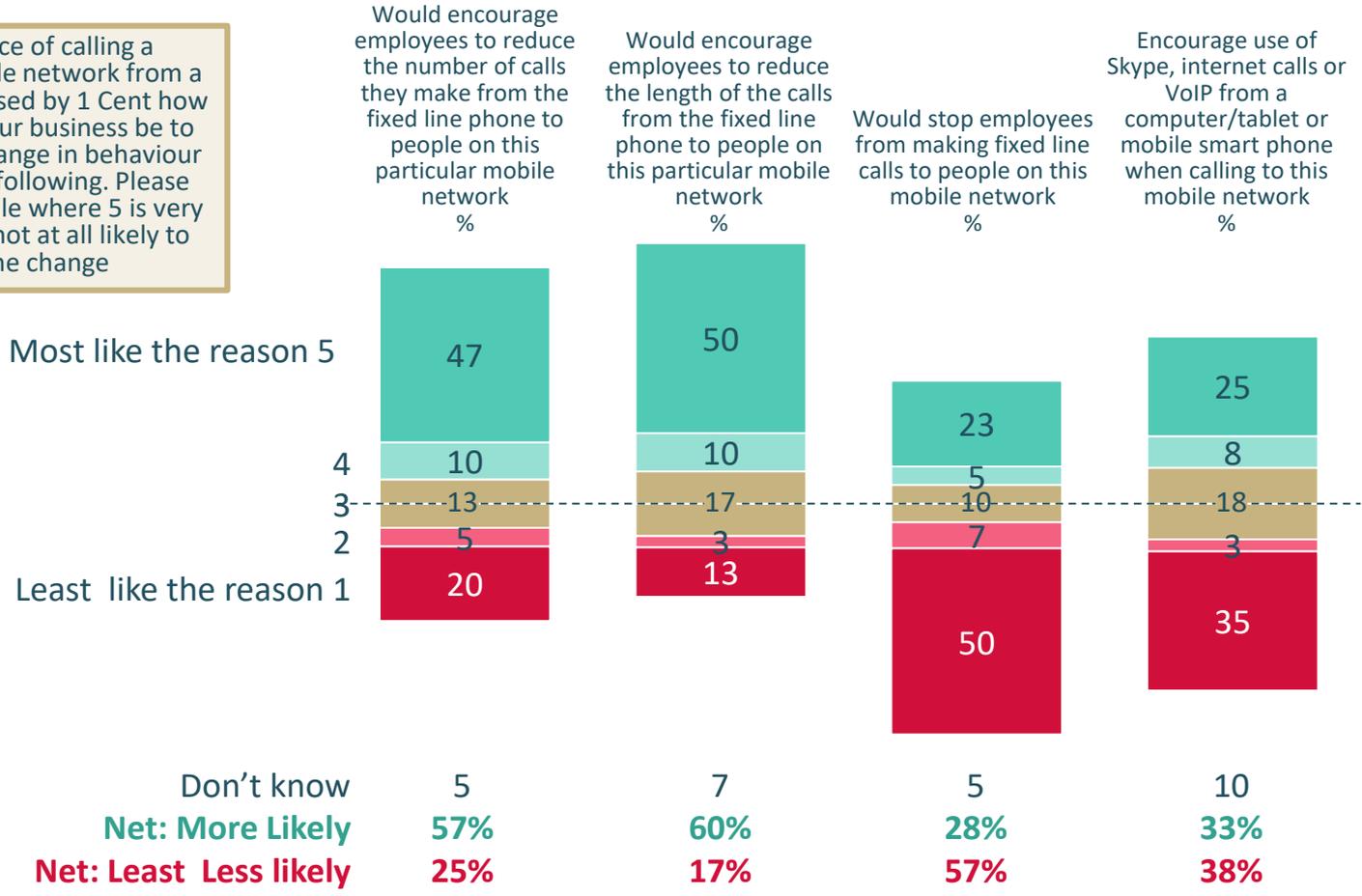
In a situation of a 1 cent increased in calling a mobile network from a fixed line there is a reduction in mobile calls same network but more significantly a reduction in calls to fixed line with an increased claimed use of data by those who claim they would definitely change behaviour.



# Likelihood Of Effect To Take Place If Increased By 1c To Mobiles From Fixed Line

## Office Phone Operator: Summary (Base: All SMEs With Business Mobile Phones who would make a change; n=60\*)

Q. If the price of calling a particular mobile network from a fixed line increased by 1 Cent how likely would your business be to encourage a change in behaviour in each of the following. Please answer on a scale where 5 is very likely and 1 is not at all likely to make the change



\*Small Base Size

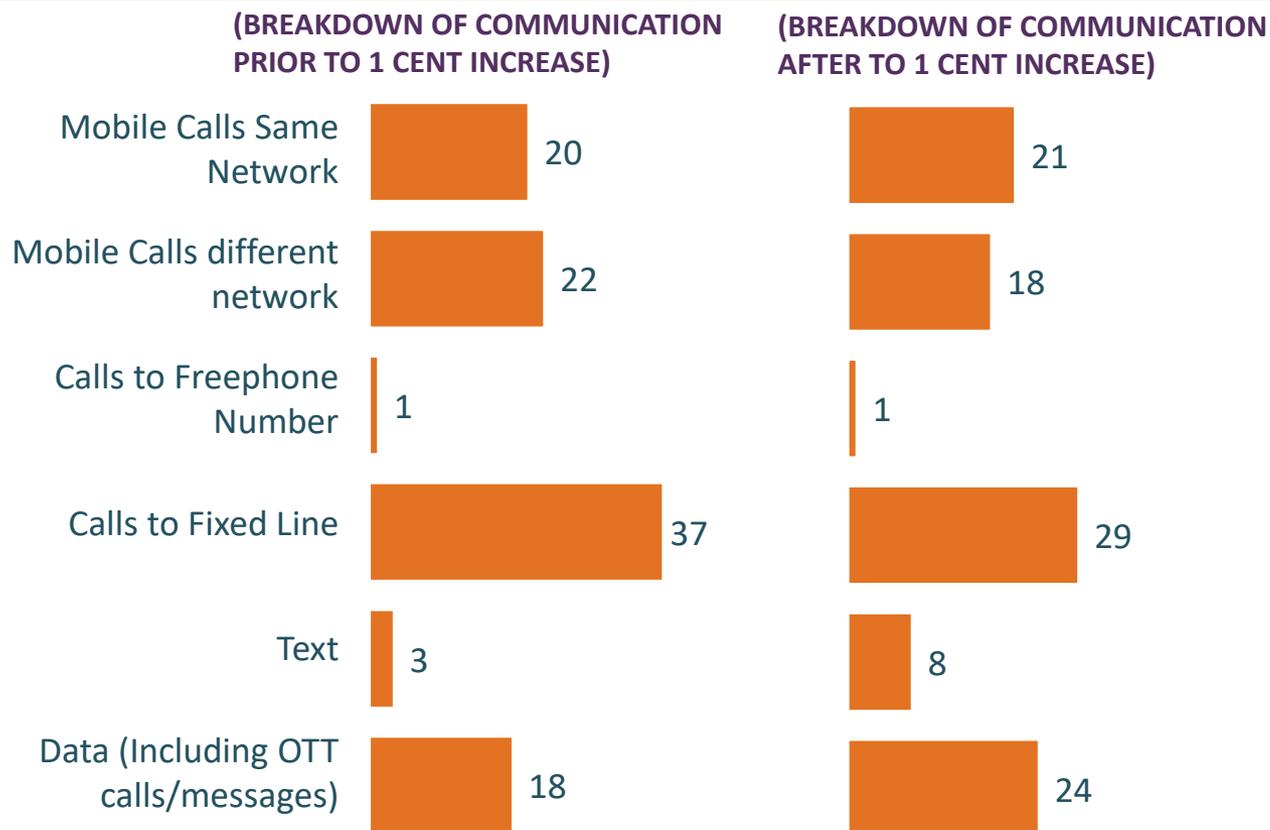
50% of SME's who would make a change based on a 1cent increase are most likely to encourage employee to reduce length of calls from fixed line to mobile network in question.



# Change Behaviour On Inbound Calls If Call to Your Mobile Increased by 1 Cent Per Min

(Base: All SME's Likely to Definitely Change Behaviour -52)

Q. If the price to customers of calling your business mobile increased by 1 Cent, how if at all, would this impact the percentage breakdown of all inbound communication to your business?



Little claimed difference on inbound communication given a 1 cent increase in price of calling the business mobile network.

REDC



# Questionnaire

Good morning/afternoon/evening. I am \_\_\_\_\_ from RED C Research & Marketing, an independent Irish market research agency. We are carrying out a survey today about access to and usage of telecommunications. Would you mind answering a few questions?

**CLASSIFICATION SECTION**

**INTERVIEWER:** SINGLECODE  
**SCRIPTER:** ASK ALL, SINGLECODE  
**BASE:** ALL SME'S

1. Does your company provide mobile phones to employees for work purposes (this can include an outright/part payment of at least one employees, phone bill or an allowance that enables employees to claim expenses for phone calls made)?

- 1 Yes  
2 No - CLOSE

**INTERVIEWER:** WE NEED TO SPEAK TO THE PERSON RESPONSIBLE FOR TELECOMMUNICATIONS SELECTION WITHIN THE BUSINESS. IF CODE 2 ASK TO SPEAK TO DECISION MAKER  
**SCRIPTER:** SINGLECODE, CLOSE IF DECISION MAKER NOT AVAILABLE  
**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

2. Are you the person in your office who is responsible or jointly responsible for selecting your current mobile supplier(s) and for deciding and managing policies around mobile phone usage or switching mobile phone service providers?

- 1 Yes  
2 No - ASK TO SPEAK WITH THE PERSON RESPONSIBLE AND RESTART WHEN SPEAKING WITH THAT PERSON – CLOSE IF DECISION MAKER NOT AVAILABLE

**INTERVIEWER:** SINGLECODE  
**SCRIPTER:** ASK ALL, SINGLECODE, INCLUDE USUAL DEFINITION OF URBAN vs. RURAL  
**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

- 2b. Is your main business premises located in an urban or a rural area?  
1. Urban  
2. Rural

**USAGE**

**INTERVIEWER:** RECORD %  
**SCRIPTER:** ALL CODE 1 AT Q1, MIN 1% MAX 100%  
**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

3. What proportion of employees have a mobile phone number provided by the business (as distinct from claiming expenses based on the use of their own personal mobile phone for business purposes)?

\_\_\_\_\_ %

Dont know

**INTERVIEWER:** RECORD %  
**SCRIPTER:** ALL CODE 1 AT Q1, MIN 1% MAX 100%  
**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

4. What proportion of employees use their own personal mobile phone for business purposes and claim expenses based on this use?

\_\_\_\_\_ %

Dont know

**INTERVIEWER:** RECORD % (A SMART PHONE IS ANY PHONE THAT CAN ACCESS THE INTERNET)  
**SCRIPTER:** ALL CODE 1 AT Q1, MIN 0% MAX 100%  
**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

5. What proportion of employees are supplied with a smart phone provided by the business

\_\_\_\_\_ %

Dont know

**INTERVIEWER:** SINGLE CODE, READ OUT  
**SCRIPTER:** ALL MORE THAN 0% AT Q5, SINGLECODE  
**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

6. Does your business encourage those employees with business supplied smart phones to use skype, or other video/voice applications, to call one another?

- 1 Yes  
2 No  
3 Don't know

**INTERVIEWER:** READ OUT, RESPONSES MUST ADD UP TO 100% (PREPAY IS WHERE CREDIT IS BOUGHT BEFORE CALLS ARE MADE, BILL PAY IS WHERE THE BUSINESS HAS A CONTRACT WITH THE OPERATOR AND RECIEVES BILLS)  
**SCRIPTER:** ALL CODE 1 AT Q1, RESPONSES MUST ADD UP TO 100%  
**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

7. What percentage of the phones provided by the business to employees are on prepay packages and what percentage are on a bill pay package?

- 1 Pre Pay Package \_\_\_\_\_ %  
2 Bill Pay Package \_\_\_\_\_ %

**INTERVIEWER:** SINGLECODE  
**SCRIPTER:** ALL CODE 1 AT Q1, SINGLECODE

**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

8. Do you use a single mobile operator for all of the mobile phone numbers provided by the business to employees

- 1 Yes
- 2 No - more than 1 mobile operator

**INTERVIEWER:** PROBE TO PRECODES

**SCRIPTER:** ALL CODE 1 AT Q1 SINGLECODE

**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

9. Which of the following is your **Main** mobile phone operator?

1. Vodafone
2. Meteor
3. Three (also known as H3GI and O2)
4. eir (eMobile)
5. Lyca Mobile
6. iD Mobile/Carphone Warehouse
7. Virgin Media
8. Postphone
9. 48
10. Tesco Moible
11. Other \_\_\_\_\_(Specify)
98. Dont Know

**INTERVIEWER:** READ OUT CODE 1-3, PROBE TO PRECODES

**SCRIPTER:** ALL CODE 1 AT Q1 AND CODE 2 AT Q8, HIDE RESPONSE SELECTED AT Q9, MULTICODE

**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

10. Which other company provides your mobile phone service?

1. Vodafone
2. Meteor
3. Three (also known as H3GI and O2)
4. eir (eMobile)
5. Lyca Mobile
6. iD Mobile/Carphone Warehouse
7. Virgin Media
8. Postphone
9. 48
10. Tesco Moible
11. Other \_\_\_\_\_(Specify)
98. Dont Know

**INTERVIEWER:** PROBE TO PRECODES, MULTICODE

**SCRIPTER:** ALL CODE 1 AT Q1 AND CODE 2 AT Q8, MULTICODE

**BASE:** ALL SMEs WITH MORE THAN ONE BUSINESS MOBILE PHONE PROVIDER

11. Why do you use more than 1 mobile phone operator?

- 1 In order to reduce cost - allowing employees to call other mobiles on the same network
- 2 In order to reduce cost - allowing employees to pick the best price for a call or other service (such as unlimited calls or cheaper costs at different times)
- 3 In order to reduce cost for customers wishing to call a mobile phone number on their own network
- 4 Some employees are on existing contracts with a minimum term and therefore these employee's phones cannot be switched to another operator
- 5 Availability of particular types of phone (such as iPhones)
- 6 To avail of a more favourable data allowance with one operator
- 7 Employees have different usage patterns which are best provided for by using different operators
- 8 One or more phones is for a mobile operator in another country (for instance a UK phone)
- 9 Other, specify

**INTERVIEWER:** SINGLE CODE

**SCRIPTER:** ALL CODE 2 AT Q8, SINGLECODE

**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

12. Do any of your individual employees have active (used in the last two weeks) business supplied mobile phone numbers with more than one operator?

- 1 Yes
- 2 No
- 3 Don't know

**INTERVIEWER:** PROBE TO PRECODES, MULTICODE

**SCRIPTER:** ALL CODE 1 AT Q12, MULTICODE

**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES WITH MORE THAN ONE ACTIVE PHONE NUMBER

13. Why do some employees have active (used in the last two weeks) mobile phone numbers with more than one operator?

- 1 In order to reduce cost - allowing these employees to call other mobiles on the same network
- 2 In order to reduce cost - allowing the business to pick the best price for a call or other service (such as unlimited calls or cheaper costs at different times)
- 3 In order to reduce cost for customers wishing to call a mobile phone number on their own network
- 4 Some employees are on existing contracts with a minimum term and therefore these employee's phones cannot be switched to another operator
- 5 Availability of particular types of phone (such as iPhones)
- 6 To avail of more favourable data allowance with one operator
- 7 Employees have different usage patterns which are best provided for by using different operators
- 8 One or more phones is for a mobile operator in another country (for instance a UK phone)
- 9 Other, specify

**INTERVIEWER:** RECORD %

**SCRIPTER:** ALL CODE 1 AT Q12, MIN 1% MAX 100%

**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES WITH MORE THAN ONE ACTIVE PHONE NUMBER

14. Approximately, what percentage of employees with a business mobile phone have more than one active business supplied mobile phone number?

\_\_\_\_\_ %

**INTERVIEWER:** RECORD %, MUST ADD UP TO 100%, READ OUT LIST OF PROVIDERS

**SCRIPTER:** ALL CODE 2 AT Q8, INSERT PROVIDERS AT Q9 AND Q10, MUST ADD UP TO 100%

**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

15. Could you estimate an approximate percentage of employees with business provided mobile phone numbers with [INSERT PROVIDERS AT Q9 AND Q10]?

\_\_\_\_\_ %

**INTERVIEWER:** SINGLECODE

**SCRIPTER:** ALL CODE 1 AT Q1, SINGLECODE

**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

15.a Does your business purchase mobile phone telephony as part of a bundle including other telecommunication services (such as fixed line, broadband, etc.) from the same supplier?

1. Yes
2. No
3. Dont know

**INTERVIEWER:** MULTICODE, READ OUT

**SCRIPTER:** ALL CODE 1 AT Q15a, READ OUT, MULTICODES

**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

15.b Apart from mobile phones, what other services are included in this bundle?

1. Fixed line phone
2. Fixed line Broadband
3. Leased line/Ethernet
4. Mobile broadband
5. Other (Specify)
6. Don't know

**INTERVIEWER:** SINGLECODE, READ OUT

**SCRIPTER:** ALL CODE 1-5 AT Q15b, INSERT CODES SELECTED AT Q15.b, READ OUT SINGLECODE

**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

15.c Which of these would you consider to be the main/most important element of the bundle?

MOBILE PHONE +

INSERT CODES SELECTED AT Q15.b

**Don't know (DON'T READ OUT)**

**BILL PAY SECTION**

For this next section, I will be asking questions about the phones which are on bill pay plans only.

**INTERVIEWER:** READ OUT, SINGLECODE, (SOME BUSINESSES HAVE ALL BUSINESS SUPPLIED MOBILE PHONE NUMBERS ON A SINGLE COMPANY PLAN WITH A SINGLE SET OF PRICES AND FEATURES THAT ARE SHARED ACROSS EMPLOYEES; OTHERS MAY HAVE MULTIPLE PLANS FOR INDIVIDUAL EMPLOYEES WITH DIFFERENT PRICES/FEATURES)

**SCRIPTER:** ALL MORE THAN 0% AT CODE 2 Q7, SINGLECODE

**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES ON BILL PAY

16. In your business, are all of employees on a single shared company mobile plan or do you have different mobile plans for different employees?

- 1 All employees with a mobile phone number paid for by the business are on the same company wide plan
- 2 Employees are on different plans with different prices and options applying
- 3 A mix of the above

**INTERVIEWER:** READ OUT, SINGLECODE

**SCRIPTER:** ALL MORE THAN 0% AT CODE 2 Q7, SINGLECODE

**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES ON BILL PAY

17. Are all employees with mobile phones supplied by your business on standard mobile plans from your operators or are some on bespoke packages designed to match your individual employee needs?

- 1 All on standard plans
- 2 All on bespoke plans
- 3 A mix of both standard and bespoke

**INTERVIEWER:** RECORD %

**SCRIPTER:** ALL CODE 2 OR 3 AT Q17, MAX 100%

**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES ON BILL PAY BESPOKE PACKAGAES

18. What percentage of your employees with business supplied mobile phones are on bespoke packages?  
%

Dont know

**INTERVIEWER:** IF NO PROVIDER AT Q9, READ "YOUR MAIN PROVIDER", RECORD RESPONSE

**SCRIPTER:** ALL MORE THAN 0% AT CODE 2 Q7, INSERT PROVIDER SELECTED AT Q9.

**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES ON BILL PAY

19. What is the name of the main package or plan with [INSERT PROVIDER SELECTED AT Q9] that your business uses? Some businesses may have more than one plan, but in this instance we are interested in the main package or plan used by your business.

20.

- 1. Vodafone RED Business
- 2. Vodafone RED Business One
- 3. Vodafone RED Business Plus
- 4. Vodafone RED Business Super
- 5. Vodafone One Net Express
- 6. Vodafone One Net Lite
- 7. Vodafone Business Share
- 8. Vodafone Control
- 9. Three Business Essential
- 10. Three Business Extra
- 11. Three Business Ultra
- 12. Three Business Max
- 13. Three Business Multi SIM
- 14. Three Business Multi Essential
- 15. Three Business Multi Extra
- 16. Three Business Multi Max
  
- 17. Vodafone Customised Plan
- 18. Three Customised Plan
- 19. Other (Specify)

**INTERVIEWER:** SINGLE CODE

**SCRIPTER:** ALL MORE THAN 0% AT CODE 2 Q7, SINGLECODE, INCLUDE YES/NO/DK FOR EACH OPTION BELOW

**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES ON BILL PAY

21. Thinking about the main mobile phone plan/package that your business has, please indicate if each of the following features are included.

- 1. A single flat monthly fee charged to the company with an additional fee for each active mobile phone number on your account. For example you are charged a monthly account fee of say 200 Euro - there may be a separate and additional charge for each active mobile phone
- 2. A fixed monthly fee per active mobile phone number - For example a monthly charge of 15 Euro per active mobile number
- 3. Does your plan have a maximum cap on the expenditure per mobile phone number

**INTERVIEWER:** SINGLE CODE, READ OUT

**SCRIPTER:** ALL MORE THAN 0% AT CODE 2 Q7, SINGLECODE

**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES ON BILL PAY

22. Thinking about the main mobile phone plan/package that your business has, does this package contain inclusive minutes which can be used for calls between mobile phones of employees on that particular plan (i.e minutes that can be used by employees to call each other)

- 1 No minutes included
- 2 Unlimited amount
- 3 Specific amount
- 4 Don't know

**INTERVIEWER:** SINGLECODE, READ OUT

**SCRIPTER:** ALL MORE THAN 0% AT CODE 2 Q7 AND CODE 2-3 AT Q21, SINGLECODE

**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES ON BILL PAY

23. Are the inclusive employee to employee minutes shared between all of the employees on the plan or package or does each employee have their own specific amount of inclusive minutes?

- 1 Shared across all employees
- 2 A specific amount for each employee which cannot be shared with other employees
- 3 Don't know

**INTERVIEWER:** SINGLECODE, READ OUT

**SCRIPTER:** ALL MORE THAN 0% AT CODE 2 Q7, SINGLECODE

**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES ON BILL PAY

24. Does your package contain inclusive minutes which can be used for calls to any mobile on the same mobile network as you?

- 1 No minutes included
- 2 Unlimited amount
- 3 Specific amount
- 4 don't know

/



**INTERVIEWER:** SINGLECODE, READ OUT

**SCRIPTER:** ALL MORE THAN 0% AT CODE 2 Q7 AND CODE 2-3 AT Q23, SINGLECODE

**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES ON BILL PAY

25. Are the inclusive same network, mobile to mobile minutes shared between all of the employees on the plan or does each employee have their own inclusive minutes?

- 1 Shared across all employees
- 2 A specific amount for each employee which cannot be shared with other employees
- 3 Don't know

**INTERVIEWER:** SINGLECODE, READ OUT

**SCRIPTER:** ALL MORE THAN 0% AT CODE 2 Q7, SINGLECODE

**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES ON BILL PAY

26. Does your package contain inclusive minutes that can be used for calls to mobiles on any mobile network

- 1 No minutes included
- 2 Unlimited amount
- 3 Specific amount
- 4 Don't know

**INTERVIEWER:** SINGLECODE, READ OUT

**SCRIPTER:** ALL MORE THAN 0% AT CODE 2 Q7 AND CODE 2-3 AT Q25, SINGLECODE

**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES ON BILL PAY

27. Are the inclusive any network, mobile to mobile minutes shared between all of the employees on the plan or does each employee have their own inclusive minutes?

- 1 Shared across all employees
- 2 A specific amount for each employee which cannot be shared with other employees
- 3 Don't know

**INTERVIEWER:** SINGLECODE, READ OUT

**SCRIPTER:** ALL MORE THAN 0% AT CODE 2 Q7, SINGLECODE

**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES ON BILL PAY

28. Does your package contain inclusive minutes that can be used for calls to any fixed line phone

- 1 No minutes included
- 2 Unlimited amount
- 3 Specific amount
- 4 Don't know

**INTERVIEWER:** SINGLECODE, READ OUT

**SCRIPTER:** ALL MORE THAN 0% AT CODE 2 Q7 AND CODE 2-3 AT Q27, SINGLECODE

**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES ON BILL PAY

29. Are the inclusive calls to any fixed line phone minutes shared between all of the employees on the plan or does each employee have their own inclusive minutes?

- 1 Shared across all employees
- 2 A specific amount for each employee which cannot be shared with other employees
- 3 Don't know

30. ~~Removed~~

31. ~~Removed~~

32. ~~Removed~~

33. ~~Removed~~

34. ~~Removed~~

35. ~~Removed~~

**INTERVIEWER:** SINGLECODE, READ OUT

**SCRIPTER:** ALL MORE THAN 0% AT CODE 2 Q7, SINGLECODE

**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES ON BILL PAY

36. Does your package contain inclusive data allowance?

- 1 No data allowance included
- 2 Unlimited amount
- 3 Specific amount
- 4 Don't know

**INTERVIEWER:** SINGLECODE, READ OUT

**SCRIPTER:** ALL MORE THAN 0% AT CODE 2 Q7 AND CODE 2-3 AT Q35, SINGLECODE

**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES ON BILL PAY

37. Is the inclusive data allowance shared between all of the employees on the plan or does each employee have their own data allowance?

- 1 The inclusive data allowance shared between all of the employees on the plan
- 2 A specific amount for each employee which cannot be shared with other employees
- 3 Don't know

**INTERVIEWER:** SINGLECODE, PROBE TO PRECODES

**SCRIPTER:** ALL MORE THAN 0% AT CODE 2 Q7, SINGLECODE

**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES ON BILL PAY

38. Does your package include free mobile phones, subject to a contract being in place?

- 1 No - Mobile phones are charged for
- 2 Yes - Free mobile phones included
- 3 Don't know

39. ~~Removed~~

40. ~~Removed~~

**INTERVIEWER:** SINGLE CODE

**SCRIPTER:** ALL MORE THAN 0% AT CODE 2 Q7, SINGLECODE

**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES ON BILL PAY



41. On average do the employees use more than the set amount of voice minutes included in your plan?

- 1 Yes - On average, they use more than the inclusive minutes
- 2 No - On average, they don't use more than the inclusive minutes
- 3 Don't know

**INTERVIEWER:** SINGLECODE

**SCRIPTER:** ALL MORE THAN 0% AT CODE 2 Q7, SINGLECODE

**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES ON BILL PAY

42. On average do the employees use more than the set amount of data allowed in your plan?

- 1 Yes
- 2 No
- 3 Don't know

VoIP Section

**INTERVIEWER:** SINGLECODE

**SCRIPTER:** ALL MORE THAN 0% AT Q5, SINGLE CODE PER OPTION, YES,NO, DON'T KNOW FOR EACH OPTION

**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

Q41a Do any of the employees in the business use any of the following Apps for Voice or Video Calls from their mobile smart phone?

- Viber
- Snapchat
- Skype
- WhatsApp
- Facetime
- Other App service for Voice/Video calls

- 1. Yes
- 2. No
- 3. Don't know

**INTERVIEWER:** RECORD %

**SCRIPTER:** ANY CODE YES AT Q 41a

**BASE:** ALL SMEs USING ANY APP FOR VOICE/VIDEO CALLS

Q41b Thinking about all of the mobile calls made from business supplied mobile phones, please estimate the percentage of calls made over standard mobile networks and the percentage of calls using app/internet service such as Skype/Viber/Whatsapp ? Please estimate if unsure.

- 1. Standard Mobile Calls (Calling between mobile networks) ---- %
- 2. Mobile Calls Using App/Internet (Skype, SnapChat or similar) ---- %
- 3. Don't know (DON'T READ OUT)

**INTERVIEWER:** SINGLECODE

**SCRIPTER:** ALL MORE THAN 0% AT Q5, SINGLE CODE PER OPTION, YES/No/DK FOR EACH OPTION

**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

Q41c Do any of the employees in the business use any of the following Apps for instant messaging from their mobile phone for business purposes?

- 1 Viber
- 2 Skype
- 3 WhatsApp
- 4 Facebook Instant messenger
- 5 Snap Chat
- 6 Other App service for instant messaging

- 1. Yes
- 2. No
- 3. Don't know

**INTERVIEWER:** SINGLECODE

**SCRIPTER:** ALL MORE THAN 0% AT Q5, SINGLECODE

**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

Q41d How likley or unlikely are employees in your business to make calls/use instant messaging from their mobile using app/internet services such as Skype/Vider/Whatapp in the future.

- 1. Very likley
- 2. Quite likley
- 3. Not very likley
- 4. Not at all likley
- 5. Don't Know

**INTERVIEWER:** PROBE TO MORE MENTIONS. DO NOT READ OUT PROBE TO PRECODES.

**SCRIPTER:** ANY CODE 1-2 AT Q41d, MULTICODE

**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

Q41e You mentioned the employees of the business are likley/ to make calls/use instant messaging from their mobile. why do you think this?

- 1. Improved technology has made these applications more accessible
- 2. Standard mobile to mobile calls are too expensive
- 3. Standard text rates are too expensive
- 4. Internationals call are too expensive on mobile phone
- 5. Allows for group conversations
- 6. Prefer to be able to see the person I am speaking with
- 7. Fast and effcent means of communication
- 8. Clearer connection
- 98. Other \_\_\_\_\_ please specify

Don't know (DON'T READ OUT)

**INTERVIEWER:** PROBE TO MORE MENTIONS. DO NOT READ OUT PROBE TO PRECODES.

**SCRIPTER:** ANY CODE 3-4 Q41d, MULTICODE

**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

Q41f You mentioned the employees of the business are unlikely to make calls/use instant messaging from their mobile. Why do you think this?

1. They would be concerned about the quality of voice on these types of calls
2. They would be concerned about the reliability of the connection with these type of calls
98. Other \_\_\_\_\_ please specify

Don't know (DON'T READ OUT)

**MAKING/RECEIVING CALLS ON BUSINESS MOBILE PHONES**

**INTERVIEWER:** SINGLECODE, READ OUT  
**SCRIPTER:** ALL CODE 1 AT Q1, SINGLECODE  
**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

43. Thinking about the use of business mobile phones in your organisation, which of the following best describes the company's usage in a typical month

- 1 We usually make more calls than we receive
- 2 We usually make and receive a similar number of calls
- 3 We usually receive more calls than we would make
- 4 Don't know

**INTERVIEWER:** READ OUT, SINGLECODE  
**SCRIPTER:** ALL CODE 1 AT Q1, SINGLECODE  
**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

44. Thinking about the calls made from business mobile phones to other mobile phones in a typical month, which of the following most accurately describes your business' usage?

- 1 Similar amounts of calls to mobile phones on your network as to mobile phones on other mobile networks
- 2 More calls to mobile phones on your network than to mobile phones on other mobile networks
- 3 More calls to mobile phones on other networks than to mobile phones on your mobile network
- 4 Don't make any outgoing calls
- 5 Don't know (DONT READ OUT)

**INTERVIEWER:** RECORD % FOR EACH, MUST ADD UP TO 100%  
**SCRIPTER:** ALL CODE 1 AT Q1, MUST ADD UP TO 100%  
**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

45. Thinking about the calls made from your business' mobile phones in a typical month, could you state the proportion of calls to mobile phones and fixed line phones?

1. calls to mobile phones \_\_\_\_\_%
2. calls to fixed line phones (any phone number which isn't a mobile phone) \_\_\_\_\_%
3. Don't Know

**INTERVIEWER:** SINGLECODE

**SCRIPTER:** ALL CODE 1 AT Q1, SINGLECODE  
**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

46. Has your business switched plans or bespoke packages in the last 12 months?

1. Yes
2. No
3. Dont know

**INTERVIEWER:** PROBE TO PRECODES, MULTICODE  
**SCRIPTER:** ALL CODE 1 AT Q45, MULTICODE  
**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

47. Why did your company switch plans?

- 1 To reduce the overall cost of making mobile calls
- 2 To reduce the overall cost of all calls
- 3 To avail of a better type of service (such as data allowance)
- 4 To allow employee to use a different type of hand-set phone
- 5 Other (Specify)

**COST**

**INTERVIEWER:** RECORD TO NEAREST EURO  
**SCRIPTER:** ALL CODE 1 AT Q1, MAX 10,000, SINGLECODE  
**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

48. What would the typical total recurring monthly mobile cost be for all employees with business mobile phones including the basic cost of the plan/package/bespoke deal and the cost of any out of package calls or other services but excluding the cost of a fixed line phone which may be supplied by the same operator?

1. € \_\_\_\_\_
2. Dont know

49. **Removed**

**INTERVIEWER:** RECORD TO NEAREST EURO  
**SCRIPTER:** ALL CODE 1 AT Q1, MAX 10,000, SINGLECODE. FIGURE SHOULD BE LESS THAN ANSWER Q48  
**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

50. What approximately is the total monthly cost of providing mobile phone service to employees (not including any additional charges)?

1. € \_\_\_\_\_
2. Dont know

**INTERVIEWER:** SINGLECODE  
**SCRIPTER:** ALL CODE 1 AT Q1, SINGLECODE. PROBE TO PRE CODES  
**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

51. Approximately how much does this basic mobile plan or bespoke package cost per month per employee?

- 1 Up to 10 Euro
- 2 Between 11 Euro and 20 Euro
- 3 Between 21 and 30 Euro
- 4 Between 31 and 40 Euro
- 5 Between 41 and 50 Euro
- 6 Between 51 and 60 Euro
- 7 Between 61 and 80 Euro
- 8 Between 81 and 100 Euro
- 9 Between 100 and 150 Euro
- 10 More than 150 Euro
- 11 Don't know

**INTERVIEWER:** SINGLECODE, PROBE TO PRECODES  
**SCRIPTER:** ALL CODE 1 AT Q1, SINGLECODE  
**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

52. Do you know the per minute cost of making calls from business mobile phone outside of the monthly plan/package?

- 1 Know the exact cost of calls
- 2 Know the approximate cost of calls
- 3 Don't know or not sure of the cost of calls
- 4 Other

**INTERVIEWER:** SINGLECODE, PROBE TO PRECODES  
**SCRIPTER:** ALL CODE 1 AT Q 1, SINGLECODE  
**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

53. Do you know the cost per Gigabyte of using data on your business mobile phone?

- 1 Know the exact cost of data
- 2 Know the approximate cost of data
- 3 Don't know or not sure of the cost of data
- 4 Other

**INTERVIEWER:** RECORD TO NEAREST EURO  
**SCRIPTER:** ALL CODE 1 AT Q1 AND CODE 1-2 AT Q51  
**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

54. What is the cost per Gigabyte of data per employee if the data allowance is exceeded on a mobile phone:

Record actual amount

- 1. Dont know

55. **Removed**

**INTERVIEWER:** SINGLECODE  
**SCRIPTER:** ALL CODE 1 AT Q1  
**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

56. Thinking of your business' mobile phone costs, have you noticed any changes over the last twelve months?

- 1 Yes
- 2 No
- 3 Don't know

**INTERVIEWER:** SINGLECODE  
**SCRIPTER:** ALL CODE 1 AT Q55, SINGLE CODE FOR EACH STATEMENT  
**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

57. Have you noticed the cost of any of the following changing (and indicate whether you believe the cost has increased or decreased)?

- 1. Increased
- 2. No change
- 3. Decreased

- a) Cost of calls to mobile phones on the same network as you
- b) Cost of calls to mobile phones on other networks
- c) Per Gigabyte cost of data usage

**INTERVIEWER:** RECORD VEBATIM, FULLY PROBE  
**SCRIPTER:** ALL CODE 1 AT Q55  
**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

58. Have you noticed any other changes in the costs of making calls or the provision of data



CORPORATE POLICY

**INTERVIEWER:** SINGLECODE  
**SCRIPTER:** ALL CODE 1 AT Q1, SINGLECODE  
**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

59. Does your company have a policy or guidelines on how your employees can or should use their business mobile phones?

- 1 Yes
- 2 No

**INTERVIEWER:**, MULTICODE, PROBE TO PRECODES  
**SCRIPTER:** ALL CODE 1 AT Q58, MULTICODE, MULTICODE  
**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

60. Does the policy or guidelines specify what the employee should do for each of the following activities?

1. Using a company fixed line phone when making a business calls to other mobiles
2. Making a business call from a company mobile to another employee on their company mobile
3. Making a mobile phone call for work purposes to mobiles on the same mobile network to that used by the company
4. Making a mobile phone call for work purposes to mobiles on other networks (different to the company mobile network)
5. Sending a text message for work purposes
6. How much an data services can be used by employee (such as app downloads, email, social networking etc)
7. When an employee can call or text from one company mobile phone to another company mobile phone

Dont know (dont read out)

**INTERVIEWER:** RECORD VERBATIM, FULLY PROBE  
**SCRIPTER:** ALL CODE 1 AT Q58  
**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

61. Are there any other activities not mentioned that the company has a policy or guideline for?

**INTERVIEWER:** SINGLECODE  
**SCRIPTER:** ALL CODE 1 AT Q58, SINGLECODE  
**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

62. Does your business actively monitor the policy?

- 1 Yes
- 2 No
- 3 Don't know

**INTERVIEWER:** MULTICODE, READ OUT  
**SCRIPTER:** ALL CODE 1 AT Q61, MULTICODE  
**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

63. How do you monitor the employee usage policy?

- 1 Require employees to explain usage costs for their business phone regularly
- 2 Check bills and query any large unexplained usage
- 3 Other

**INTERVIEWER:** SINGLECODE  
**SCRIPTER:** ALL MORE THAN 0% AT CODE 2 Q7, SINGLECODE  
**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

64. Do you or does somebody else in your organisation check in detail the mobile phone bills that your business receives (either electronically or in the post)?

- 1 Yes - myself or another person
- 2 No

**INTERVIEWER:** MULTICODE, READ OUT  
**SCRIPTER:** ALL CODE 1 AT Q63, MULTICODE  
**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

65. Which of the following are checked on each bill?

1. The total amount
2. If the amount is greater than the bundle price
3. The cost of calls to mobiles on other networks
4. The cost of calls to fixed line phones
5. Data cost per Gigabyte of usage
6. None of these
7. Other (specify)

FIXED LINE PHONES

**INTERVIEWER:** SINGLECODE  
**SCRIPTER:** ALL CODE 1 AT Q1, SINGLECODE  
**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

66. Does your business have fixed line phones?

- 1 Yes
- 2 No

**INTERVIEWER:** SINGLECODE

**SCRIPTER:** ALL CODE 1 AT Q65, SINGLECODE

**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES AND A FIXED LINE PHONE

67. Do you have more than 1 fixed line phone number?

- 1 Yes
- 2 No

**INTERVIEWER:** RECORD NUMBER,

**SCRIPTER:** ALL CODE 1 AT Q66, MAX 100

**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES AND MORE THAN ONE FIXED LINE PHONE

68. How many fixed line phone numbers do you have?

\_\_\_\_\_

**INTERVIEWER:** SINGLECODE, PROBE TO PRECODES

**SCRIPTER:** ALL CODE 1 AT Q65, SINGLECODE

**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES AND A FIXED LINE PHONE

69. Which company provides your business'fixed line phone service?

- 1. Clearwire
- 2. Digiweb
- 3. Vodafone
- 4. Gaelic Telecom
- 5. Imagine
- 6. Irish Broadband
- 7. Magnet
- 8. Pure
- 9. 3 (including O2)
- 10. Eir (formerly eircom)
- 11. Virgin Media (formerly UPC)
- 12. Verizon
- 13. Other (specify)
- 14. Dont know

**INTERVIEWER:** SINGLECODE, PROBE TO PRECODES

**SCRIPTER:** ALL CODE 1 AT Q65, SINGLECODE

**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES AND A FIXED LINE PHONE

70. Does your main fixed line plan or package include a set number of minutes that can be used to make calls to mobiles at no extra cost?

- 1 Yes - to mobile phones on any network
- 2 Yes - to mobile phones on specified network
- 3 No - no mobile calls are included
- 4 Don't make any outgoing calls
- 5 Don't know

**INTERVIEWER:** RECORD % FOR EACH, READ OUT

**SCRIPTER:** ALL CODE 1 AT Q65, RESPONSES MUST ADD UP TO 100%

**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES AND A FIXED LINE PHONE

71. Thinking about the calls made from your main business fixed phone line in a typical month, could you state the proportion of calls which are to mobile phones and which are to fixed line phones?

- 1. Calls to mobile phones \_\_\_\_\_%
- 2. Calls to fixed line phones (any number which is not a mobile phone) \_\_\_\_\_%
- 3. Dont know

**INTERVIEWER:** SINGLECODE,

**SCRIPTER:** ALL CODE 1 AT Q65, SINGLECODE

**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES AND A FIXED LINE PHONE

72. Over the last 12 months, have you noticed any changes in the cost of making calls to mobile phones from your business fixed line phone?

- 1 Yes
- 2 No
- 3 Don't know

**INTERVIEWER:** SINGLECODE, PROBE TO PRECODES

**SCRIPTER:** ALL CODE 1 AT Q71, SINGLECODE FOR EACH STATEMENT

**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES AND A FIXED LINE PHONE

73. What changes have you noticed in...

- 1 Increased
- 2 No change
- 3 Decreased

- a) Cost of calls from your business' fixed line phone to mobile phones in general
- b) Cost of calls from your business' fixed line phone to mobile phones on particular networks

**INTERVIEWER:** RECORD VERBATIM, PROBE FULLY

**SCRIPTER:** ALL CODE 1 AT Q71,

**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES AND A FIXED LINE PHONE

74. What specific increase have you noted in relation to the cost of calls from fixed line to mobile phones?



SWITCHING

**INTERVIEWER:** SINGLECODE, PROBE TO PRECODES, IF DK AT Q9 JUST READ "MAIN MOBILE PROVIDER"  
**SCRIPTER:** ALL CODE 1 AT Q1, INSERT MAIN PROVIDER FROM Q9, SINGLECODE  
**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

75. How long has your business been with your main mobile provider [INSERT MAIN PROVIDER FROM Q9] operator?

- 1 less than 1 year
- 2 between 1 year to 18 months
- 3 More than 18 months and up to two years
- 4 Between 2 and 3 years
- 5 3 years or more
- 98 Don't know

**INTERVIEWER:** SINGLECODE  
**SCRIPTER:** ALL CODE 1 AT Q1, SINGLECODE  
**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

76. Was your business previously with another mobile phone operator?

- 1 Yes
- 2 No

**INTERVIEWER:** SINGLECODE, PROBE TO PRE CODES  
**SCRIPTER:** ALL CODE 1 AT Q75, SINGLECODE, EXCLUDE ANY CODE SELECTED AT Q9  
**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

77. Which mobile phone operator was your business previously with?

- 1. Vodafone
- 2. Meteor
- 3. Three (previously also known as H3GI, telefonica and O2)
- 4. eir mobile (formerly emobile)
- 5. Tesco Mobile
- 6. LycaMobile
- 7. iD Mobile/Carphone Warehouse
- 8. Virgin Media
- 9. Postfone
- 10. 48
- 98. Other (specify)
- 99. dont know

**INTERVIEWER:** SINGLECODE  
**SCRIPTER:** ALL CODE 1 AT Q75, SINGLECODE  
**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

78. Were you involved in the decision to switch mobile phone operator?

- 1 Yes
- 2 No

**INTERVIEWER:** READ OUT, MULTICODE  
**SCRIPTER:** ALL CODE 1 AT Q75 AND CODE 1 AT Q77, MULTICODE. READ OUT/ROTATE  
**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

79. Thinking about when your business last changed mobile operator, please select the top three reasons out of the following set of possible reasons which were important to the decision to choose that mobile operator:

- 1. Cost of calls
- 2. Cost of Data
- 3. Cost of handsets
- 4. The level of customer service
- 5. Network coverage
- 6. Amount of inclusive minutes included in the plan
- 7. Availability of mobile as part of a bundle of other services such as fixed line phone or mobile broadband
- 98. Other (Specify)

**INTERVIEWER:** READ OUT, SINGLECODE  
**SCRIPTER:** ALL CODE 1 AT Q75, ONLY SHOW RESPONSES SELECTED AT Q78, SINGLECODE  
**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

80. Out of those three which was the most important factor?

- 1. Cost of calls
- 2. Cost of Data
- 3. Cost of handsets
- 4. The level of customer service
- 5. Network coverage
- 6. Amount of inclusive minutes included in the plan
- 7. Availability of mobile as part of a bundle of other services such as fixed line phone or mobile broadband
- 99. Other (Specify)

**INTERVIEWER:** READ OUT, MULTICODE  
**SCRIPTER:** ALL CODE 1 or 2 AT Q79, MULTICODE  
**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES



79a. You said that the cost of making calls is the most important factor when choosing a mobile phone operator? Can you tell me which aspects in particular are important to your business?

1. Cost of calls to same mobile networks
2. Cost of calls between employees on same mobile network
3. Cost of texts to same mobile networks
4. The costs of calls from other networks
5. Cost of calls to the other mobile networks
6. The cost of calls made by my customers to my business
7. Other (Specify)

**INTERVIEWER:** READ OUT, MULTICODE

**SCRIPTER:** ALL CODE 2 AT Q79, MULTICODE

**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

79b. You said that the cost of data is the most important factor when choosing a mobile phone operator? Can you tell me which aspects in particular are important to your business?

1. Our usage of social media
2. Our usage of email
3. Our usage of voice calling using app/internet services
4. Our usage of instant messaging using app/internet services
5. Internet access for business specific needs
6. Other (Specify)

**INTERVIEWER:** READ OUT EXCEPT FOR CODE 7, MULTICODE

**SCRIPTER:** ALL CODE 1 AT Q1, MULTICODE, RANDOMISE

**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

81. How would your business respond if all mobile operators ceased offering cheaper rates or free calls between your company mobiles? Please select any of the following statements which apply.

- 1 reduce the number of calls between company mobiles
- 2 would make greater use of email to communicate between employees
- 3 would make greater use of texting between employees
- 4 would use the fixed line for calls between employees
- 5 would lobby mobile operators to reintroduce cheaper free calls
- 6 No change
- 7 None of these (DO NOT READ OUT)

**INTERVIEWER:** READ OUT, DON'T READ OUT DON'T KNOW

**SCRIPTER:** ALL CODE 1 AT Q1, RESPONSES MUST ADD UP TO 100%

**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

82. Please estimate the percentage breakdown of the outbound communication (where your business is making contact rather than someone contacting the business) between the following:

1. Calls over mobile phone to the same network \_\_\_\_%
2. Calls over mobile phone to another network \_\_\_\_%
3. Call from Fixed line phone \_\_\_\_%
4. SMS texting \_\_\_\_%
5. Data (i.e. VOIP/Video calls, Email, Instant Messaging etc.) \_\_\_\_%

98. Dont know (DO NOT READ OUT)

**INTERVIEWER:** READ OUT, DON'T READ OUT DON'T KNOW

**SCRIPTER:** ALL CODE 1 AT Q1, RESPONSES MUST ADD UP TO 100%

**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

83. Thinking of the different ways which potential customers communicate with you, can you estimate the percentage breakdown of this inbound communication between the following:

1. Calls over mobile phone to the same network \_\_\_\_%
2. Calls over mobile phone to another network \_\_\_\_%
3. 1800,1850 or 1890 phone numbers \_\_\_\_%
4. Fixed line phone \_\_\_\_%
5. SMS texting \_\_\_\_%
6. Data (i.e. Voice/Video calls, Email, Instant Messaging etc.) \_\_\_\_%

99. Dont know

**INTERVIEWER:** PROBE TO PRECODES, MULTICODE

**SCRIPTER:** ALL CODE 1 AND CODE 2 AT Q82, MULTICODE

**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

84. You have stated that you receive incoming calls on both fixed and mobile phone numbers. Do you use both? Is it because...

- 1 Allows customers to contact employees who may not be in the office
- 2 Allows customers to use the cheapest method of contacting the business

**RESPONDENT USE OF MOBILE PHONE**

I would now like to ask you some questions that relate to your own use of your business mobile phone.

**INTERVIEWER:** SINGLECODE

**SCRIPTER:** ALL CODE 1 AT Q1, SINGLECODE

**BASE:** ALL SMEs WITH BUSINESS MOBILE PHONES

85. Do you have a mobile phone provided by the business for work purposes?

- 1 Yes
- 2 No

**INTERVIEWER:** SINGLECODE

**SCRIPTER:** ALL CODE 1 AT Q84, SINGLECODE

**BASE:** ALL RESPONDENTS WITH BUSINESS MOBILE PHONES

86. When you are making calls from your business mobile phone, to what extent are you aware of which mobile network you are calling?

- 1 Never aware
- 2 Occasionally aware
- 3 Aware half the time
- 4 Often aware
- 5 Always aware

87. **Removed**

**INTERVIEWER:** PROBE TO PRECODES, MULTICODE

**SCRIPTER:** ALL CODE 1-4 AT Q85, MULTICODE

**BASE:** ALL RESPONDENTS WITH BUSINESS MOBILE PHONES

88. Could you explain why you are not always aware of the mobile network you are calling?

1. I can't tell from the mobile number which network the person is on
2. I don't think about the network the other person is on
3. It doesn't matter to me because the calls are included for free in my plan package
4. It doesn't matter to me because the business pays for the calls
5. It doesn't matter to me what network they are on, if I need to call for business reasons I just call
6. Other (Specify)

**INTERVIEWER:** RECORD %

**SCRIPTER:** ALL CODE 1 AT Q84, RESPONSES MUST ADD UP TO 100%

**BASE:** ALL RESPONDENTS WITH BUSINESS MOBILE PHONES

89. Thinking about the calls you make from your business mobile phone to other mobile phones in a typical month, could you estimate the proportion of the following...?

1. Calls to mobile phones on your own network \_\_\_\_\_%
2. calls to mobile phones on other networks \_\_\_\_\_%
3. Dont Know (DONT READ OUT)

90. **Removed**

**INTERVIEWER:** READ OUT, MULTICODE

**SCRIPTER:** ALL CODE 1 AT Q84, MULTICODE

**BASE:** ALL RESPONDENTS WITH BUSINESS MOBILE PHONES

91. Are there any ways that you can tell if the number you are calling is on another mobile network

- 1 There is no way to tell
- 2 From the number - definitely indicates the mobile network
- 3 From the number - possibly indicates the mobile network
- 4 There is a tone or sound which you hear when the phone is on another mobile network
- 5 Don't know
- 6 Other (Specify)

**INTERVIEWER:** PROBE TO PRECODES, SINGLECODE

**SCRIPTER:** ALL CODE 1 AT Q84, SINGLECODE

**BASE:** ALL RESPONDENTS WITH BUSINESS MOBILE PHONES

92. When making a call from your business mobile to another mobile network, how often do you think about the cost of the call?

1. Almost always or always
2. Often
3. Approximately half the time
4. Approximately a quarter of the time
5. Occasionally
6. Never

**INTERVIEWER:** PROBE TO PRECODES, SINGLECODE

**SCRIPTER:** ALL CODE 1 AT Q84, SINGLECODE

**BASE:** ALL RESPONDENTS WITH BUSINESS MOBILE PHONES

93. When you are calling from your business supplied mobile phone, to what extent are you aware whether the number you are calling is a fixed line phone?

1. Always
2. Often
3. Aware half the time
4. Occasionally
5. Never

**INTERVIEWER:** PROBE TO PRECODES, MULTICODE

**SCRIPTER:** ALL CODE 2-5 AT Q92, MULTICODE

**BASE:** ALL RESPONDENTS WITH BUSINESS MOBILE PHONES

/

94. Why are you not always aware?

1. I mostly make calls from my address book and don't see the number
2. It doesn't matter to me because the calls are included for free in my plan package
3. It doesn't matter to me because the business pays for the calls
4. It doesn't matter to me whether the person is on a fixed line phone, if I need to call for business reasons I just call
5. Other (specify)

**INTERVIEWER:** PROBE TO PRECODES, MULTICODE

**SCRIPTER:** ALL CODE 1 AT Q84, MULTICODE. PROBE TO PRE CODES

**BASE:** ALL RESPONDENTS WITH BUSINESS MOBILE PHONES

95. Are there any particular types of phone calls that you personally are concerned about making when considering the cost of a call from your business supplied mobile phone?

- 1 Calls to fixed line phones
- 2 Calls to mobiles on the same network as me
- 3 Calls to mobiles on other mobile networks to me
- 4 Calls to international numbers
- 5 Calls to freephone ( those beginning with 1800) or local (those beginning with 1850 or 1890) numbers
- 6 Calls to premium numbers such competition, tarot or horoscope lines (those typically beginning with 1500, e.g. 1580,1570 etc)
- 7 None in particular as phone paid for by company
- 8 Other (specify)

**INTERVIEWER:** PROBE TO PRECODES, SINGLECODE

**SCRIPTER:** ALL CODE 1 AT Q84, SINGLECODE

**BASE:** ALL RESPONDENTS WITH BUSINESS MOBILE PHONES

96. If someone is calling you on your business supplied mobile, to what extent do you know which mobile network they are calling from?

1. Almost always or always
2. Often
3. Approximately half the time
4. Approximately a quarter of the time
5. Occasionally
6. Never
7. Dont think about it as it does not matter to me

**INTERVIEWER:** PROBE TO PRECODES, SINGLECODE

**SCRIPTER:** ALL CODE 1 AT Q84, SINGLECODE

**BASE:** ALL RESPONDENTS WITH BUSINESS MOBILE PHONES

97. If someone is calling you on your business supplied mobile, to what extent would you know if they are calling from a fixed line network or a mobile network?

1. Almost always or always
2. Often
3. Approximately half the time
4. Approximately a quarter of the time
5. Occasionally
6. Never
7. Dont think about it as it does not matter to me

**INTERVIEWER:** READ OUT, MULTICODE

**SCRIPTER:** ALL CODE 1 AT Q84, MULTICODE

**BASE:** ALL RESPONDENTS WITH BUSINESS MOBILE PHONES

98. Are there any ways that you can tell what mobile network the person calling you is on?

- 1 There is no way to tell
- 2 From the mobile number - definitely indicates the network
- 3 From the mobile number - possibly indicates the network
- 4 Other (Specify)

**INTERVIEWER:** PROBE TO PRECODES, SINGLECODE

**SCRIPTER:** ALL CODE 1 AT Q84, SINGLECODE

**BASE:** ALL RESPONDENTS WITH BUSINESS MOBILE PHONES

99. When you see an incoming call on your business supplied mobile, do you consider what the call will cost the person calling?

1. Almost always or always
2. Often
3. Approximately half the time
4. Approximately a quarter of the time
5. Occasionally
6. Never

**INTERVIEWER:** SINGLECODE

**SCRIPTER:** ALL CODE 2-6 AT Q98, SINGLECODE

**BASE:** ALL RESPONDENTS WITH BUSINESS MOBILE PHONES

100. You mentioned that you consider what it costs people on other networks to call you. Does this ever cause you change how you treat their calls?

1. Always
2. Often
3. Sometimes
4. Occasionally
5. Never

**INTERVIEWER:** READ OUT, SINGLECODE

**SCRIPTER:** ALL CODE 1 AT Q84, SINGLECODE FOR EACH STATEMENT

**BASE:** ALL RESPONDENTS WITH BUSINESS MOBILE PHONES

101. When you are aware that the caller is on another network, do you take any of the following actions?

- 1 Don't answer the call at all
- 2 Don't answer their call but phone them back
- 3 Don't answer their call but text them instead
- 4 Answer their call but shorten the length of the call
  - a) Almost always or always
  - b) Often - Around three quarters of the time
  - c) Approximately half the time
  - d) Approximately a quarter of the time
  - e) Occasionally - less than a quarter of the time
  - f) Never

**INTERVIEWER:** READ OUT, SINGLECODE

**SCRIPTER:** ALL CODE 1 AT Q84, SINGLECODE

**BASE:** ALL RESPONDENTS WITH BUSINESS MOBILE PHONES

102. Thinking about your responses to the previous questions, do you think that...

- 1 You are quite typical of the level of awareness of the employees with business supplied mobile phones
- 2 You are more aware than the average employee with business supplied mobile phones
- 3 You are less aware than the average employee with business supplied mobile phones
- 4 None of these

#### SSNIP – From Mobile (1 Cent increase) to Mobile

I now want to ask you some questions about possible changes in the costs of your business phone service and how you might react to these price changes. These are not necessarily changes that are planned by your, or any other phone supplier - however we are interested in your reactions to them if they were to be hypothetically implemented.

These questions relate to how the business would consider these issues and not just your own mobile phone usage.

Imagine if the cost of calling **another mobile network** from your business mobile phone increased by 1 cent...

**INTERVIEWER:** SINGLECODE

**SCRIPTER:** ALL CODE 1 AT Q1, SINGLECODE

**BASE:** ALL SME's WITH BUSINESS MOBILE PHONES

103. As a consequence of this 1 cent per minute increase, do you believe that it would have an impact on how your business communicates with its customers?

- 1 Yes - definitely
- 2 Maybe
- 3 No

**INTERVIEWER:** RECORD %, READ OUT EACH OPTION. DON'T KNOW IS ALLOWED BUT DON'T READ OUT

**SCRIPTER:** ALL CODE 1-2 AT Q102. MUST ADD TO 100%

**BASE:** ALL SME's WITH BUSINESS MOBILE PHONES

104. Previously you had mentioned that the outbound communication in your business broke down as follows:

Mobile phone to the same network [INSERT FROM Q81%]

Mobile phone to another network [INSERT FROM Q81%]

Fixed line phone was [INSERT FROM Q81 %]

SMS Texting was [INSERT FROM 81Q %]

Data was [INSERT FROM 81Q %]

If the price of calling another mobile network increased by 1 CENT, how if at all, would this impact the percentage breakdown of how your company engages in outbound communication ?

1. Mobile phone calls to that network \_\_\_\_%
2. Mobile phone calls to other network \_\_\_\_%
3. Fixed line phone \_\_\_\_%
4. SMS Texting \_\_\_\_%
5. Data (for voice App calls, instant messaging, email etc.) \_\_\_\_%

**INTERVIEWER:** SINGLECODE, DON'T READ OUT DON'T KNOW

**SCRIPTER:** ALL CODE 1-2 AT Q102, INSERT 1-5 SCALE, SINGLECODE FOR EACH STATEMENT, INCLUDE DON'T KNOW ON SCALE

**BASE:** ALL SME's WITH BUSINESS MOBILE PHONES

105. If the price of calling another mobile network increased by 1c how likely would your business be to encourage a change in behaviour in each of the following. Please answer on a scale where 5 is very likely and 1 is not at all likely to make the change

1. Encourage employees to reduce the number of calls they make to people on this other mobile network
2. Encourage employees to reduce the length of the calls they make to people on this other mobile network
3. Encourage employees to send a text message instead of making a call to that network
4. Encourage use of Skype, internet calls or VoIP from a computer/tablet or mobile smart phone
5. Stop employees from making calls to people on this other mobile network
6. Provide some employees with a different SIM card for their mobile phone or a second mobile phone - one that is the same as the network that they are calling
7. Switch mobile operator as a companywide policy

## SSNIP – mobile (1 cent increase) to fixed

Now I want you to imagine if the per minute cost of calling someone on a fixed line from your business's mobile phone increased by 1 cent....

**INTERVIEWER:** SINGLECODE

**SCRIPTER:** ALL CODE 1 AT Q1, SINGLECODE

**BASE:** ALL SME'S WITH BUSINESS MOBILE PHONES

106. As a consequence of this 1 CENT per minute increase in the cost of making calls to fixed lines from your mobile network, do you believe that it would have an impact on how your business communicates with its customers?

- 1 Yes - definitely
- 2 Maybe
- 3 No

**INTERVIEWER:** RECORD %, READ OUT EACH OPTION. DON'T KNOW IS ALLOWED BUT DON'T READ OUT

**SCRIPTER:** ALL CODE 1-2 AT Q105, RESPONSES MUST ADD TO 100%

**BASE:** ALL SME'S WITH BUSINESS MOBILE PHONES

107. Previously you had mentioned that the outbound communication in your business broke down as follows:

Mobile phone to the same network [INSERT FROM Q81%]  
 Mobile phone to another network [INSERT FROM Q81%]  
 Fixed line phone was [INSERT FROM Q81 %]  
 SMS Texting was [INSERT FROM 81Q %]  
 Data was [INSERT FROM 81Q %]

If the price of calling a fixed line from your business mobile network increased by 1 Cent, how if at all, would this impact the percentage breakdown of how your company engages in outbound communication ?

1. Mobile phone calls to that network \_\_\_\_ %
2. Mobile phone calls to other network \_\_\_\_ %
3. Fixed line phone \_\_\_\_ %
4. SMS Texting \_\_\_\_ %
5. Data \_\_\_\_ %

**INTERVIEWER:** RECORD %, DON'T KNOW IS ALLOWED BUT DON'T READ OUT

**SCRIPTER:** ALL CODE 1-2 AT Q105, RESPONSES MUST ADD TO 100%

**BASE:** ALL SME'S WITH BUSINESS MOBILE PHONES

108. Previously you mentioned the proportion of inbound communication into your business as follows.

Mobile phone to the same network [INSERT FROM Q82%]  
 Mobile phone to another network [INSERT FROM Q82%]  
 1800, 1850, or 1890 phone numbers was [INSERT FROM Q82%]  
 Fixed line phone number was [INSERT FROM Q82%]

SMS Texting was [INSERT FROM Q82%]

Data was [INSERT FROM Q82%]

If the price to customers of calling your business mobile increased by 1 Cent, how if at all, would this impact the percentage breakdown of all inbound communication to your business

1. Mobile phone calls to that network \_\_\_\_ %
2. Mobile phone calls to other networks \_\_\_\_ % %
3. 1800, 1850, or 1890 phone numbers \_\_\_\_ % %
4. Fixed line phone number \_\_\_\_ % %
5. SMS Texting \_\_\_\_ % %
6. Data \_\_\_\_ % %

**INTERVIEWER:** SINGLECODE, DON'T READ OUT DON'T KNOW

**SCRIPTER:** ALL CODE 1-2 AT Q105, INSERT 1-5 SCALE, SINGLECODE FOR EACH STATEMENT, INCLUDE DON'T KNOW ON SCALE

**BASE:** ALL SME'S WITH BUSINESS MOBILE PHONES

Q107a If the price of calling a fixed line from your business mobile increased by 1 Cent how likely would your business be to encourage a change in behaviour in each of the following. Please answer on a scale where 5 is very likely and 1 is not at all likely to make the change

1. Encourage employees to reduce the number of calls they make from the business mobile network to fixed lines
2. Encourage employees to reduce the length of the calls they make from the business mobile network to fixed lines
3. Encourage employees to send a text message instead of making a call to fixed lines
4. Encourage use of Skype, internet calls or VoIP from a computer/tablet or mobile smart phone
5. Stop employees from making calls from mobile network to fixed lines
6. Provide some employees with a different SIM card for their mobile phone or a second mobile phone - one that is on a different network and so is not affected by the price increase
7. Switch mobile operator as a companywide policy

## SSNIP – Fixed (1 cent increase) to mobile

Finally I would like you to imagine if the per minute cost of calling a mobile from your fixed line office phone operator increased...

**INTERVIEWER:** SINGLECODE

**SCRIPTER:** ALL CODE 1 AT Q1, SINGLECODE

**BASE:** ALL SME'S WITH BUSINESS MOBILE PHONES

109. As a consequence of this 1 CENT increase on the price of a call from an office fixed line phone to a particular mobile operators' network, do you believe that your business would change the way it communicates with its customers?

- 1 Yes - definitely
- 2 Maybe
- 3 No

**INTERVIEWER:**

**SCRIPTER:** ALL CODE 1-2 AT Q108, RESPONSES MUST ADD UP TO 100%

**BASE:** ALL SME'S WITH BUSINESS MOBILE PHONES



110. Previously you estimate the break out of all outbound communication from your business as?

Mobile phone to the same network [INSERT FROM Q81%]  
 Mobile phone to another network [INSERT FROM Q81%]  
 Fixed line phone was [INSERT FROM Q81%]  
 SMS Texting was [INSERT FROM Q81%]  
 Data was [INSERT FROM Q81%]

If the price of calling a particular mobile network from a fixed line increased by 1 Cent, how if at all, would this impact the percentage breakdown of how your company engages in outbound communication ?

1. Mobile phone calls to that network %
2. Mobile phone calls to other network %
3. Fixed line phone %
4. SMS Texting %
5. Data %

**INTERVIEWER:** SINGLECODE, DON'T READ OUT DON'T KNOW

**SCRIPTER:** ALL CODE 1-2 AT Q108, INSERT 1-5 SCALE, SINGLECODE FOR EACH STATEMENT, ALLOW DON'T KNOW ON SCALE

**BASE:** ALL SME's WITH BUSINESS MOBILE PHONES

111. If the price of calling a particular mobile network from a fixed line increased by 1 Cent how likely would your business be to encourage a change in behaviour in each of the following. Please answer on a scale where 5 is very likely and 1 is not at all likely to make the change

1. Would encourage employees to reduce the number of calls they make from the fixed line phone to people on this particular mobile network
2. Would encourage employees to reduce the length of the calls from the fixed line phone to people on this particular mobile network
3. Would stop employees from making fixed line calls to people on this mobile network
4. Encourage use of Skype,internet calls or VoIP from a computer/tablet or mobile smart phone when calling to this mobile network



**THANK  
YOU**

**REDC**