

Residential Telecommunications Survey

Quarterly Report Prepared For:



By:





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Introduction

- * **A telecommunications survey is conducted annually on behalf of the Commission for Communications Regulation (ComReg), amongst a nationally representative sample of the general public in the Republic of Ireland.**

- * **The survey measures consumer usage, attitudes and satisfaction trends in the areas of residential landline services and the mobile market, as well as general attitudes to telecommunications. This year, sections new to the survey include pay phone services and directory enquiry services.**

- * **This summary report reviews the findings of the 2003 survey, conducted by TNS MRBI.**

- * **500 CATI (Computer Assisted Telephone Interviews) were conducted with adults aged 15 and over, with quotas placed on sex, age, social class and region to ensure representation of the adult population, with a landline telephone in the household.**

- * **Fieldwork was conducted from 30th January – 4th February, 2003.**



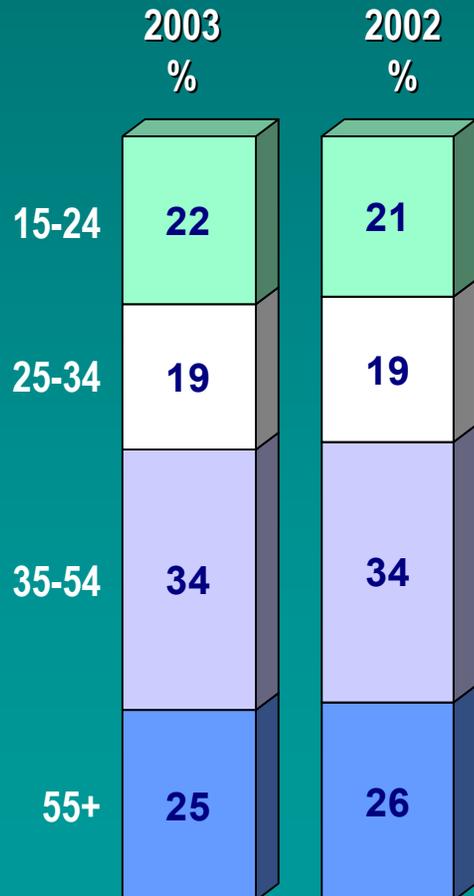
Charted Findings



Respondent Profile (I)

(Base: All Respondents: 500)

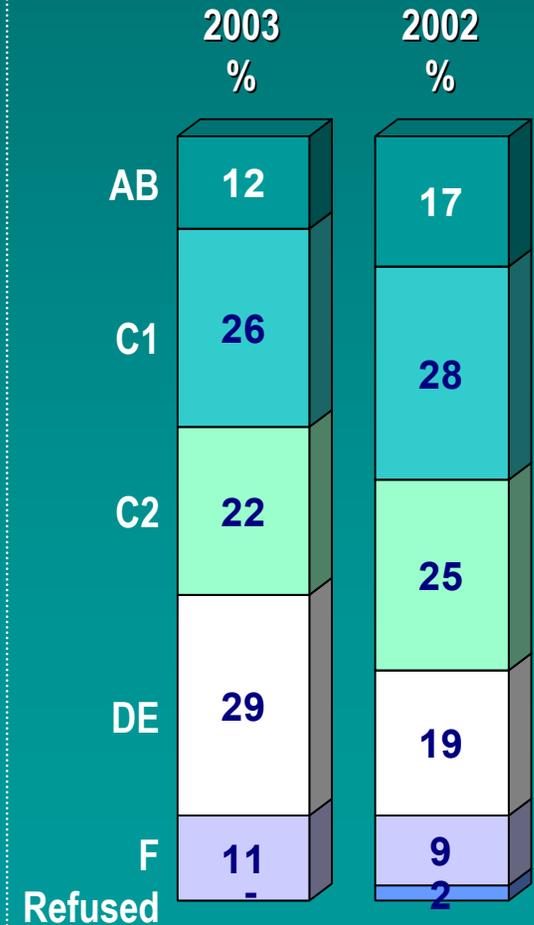
AGE



GENDER



SOCIAL CLASS



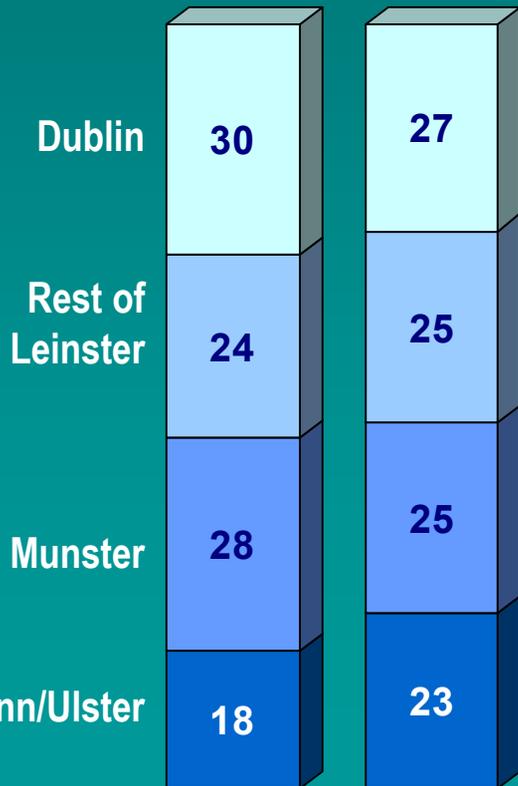


Respondent Profile (II)

(Base: All Respondents: 500)

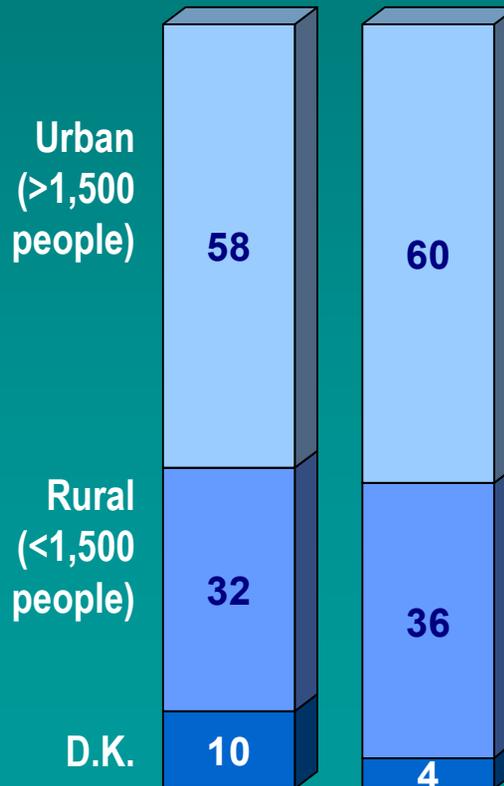
REGION

2003 % 2002 %



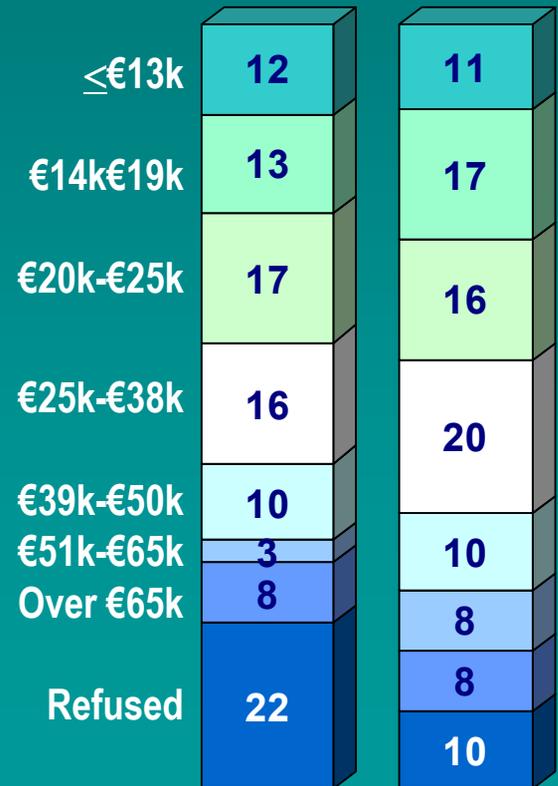
POPULATION

2003 % 2002 %



HOUSEHOLD INCOME

2003 % 2002 %



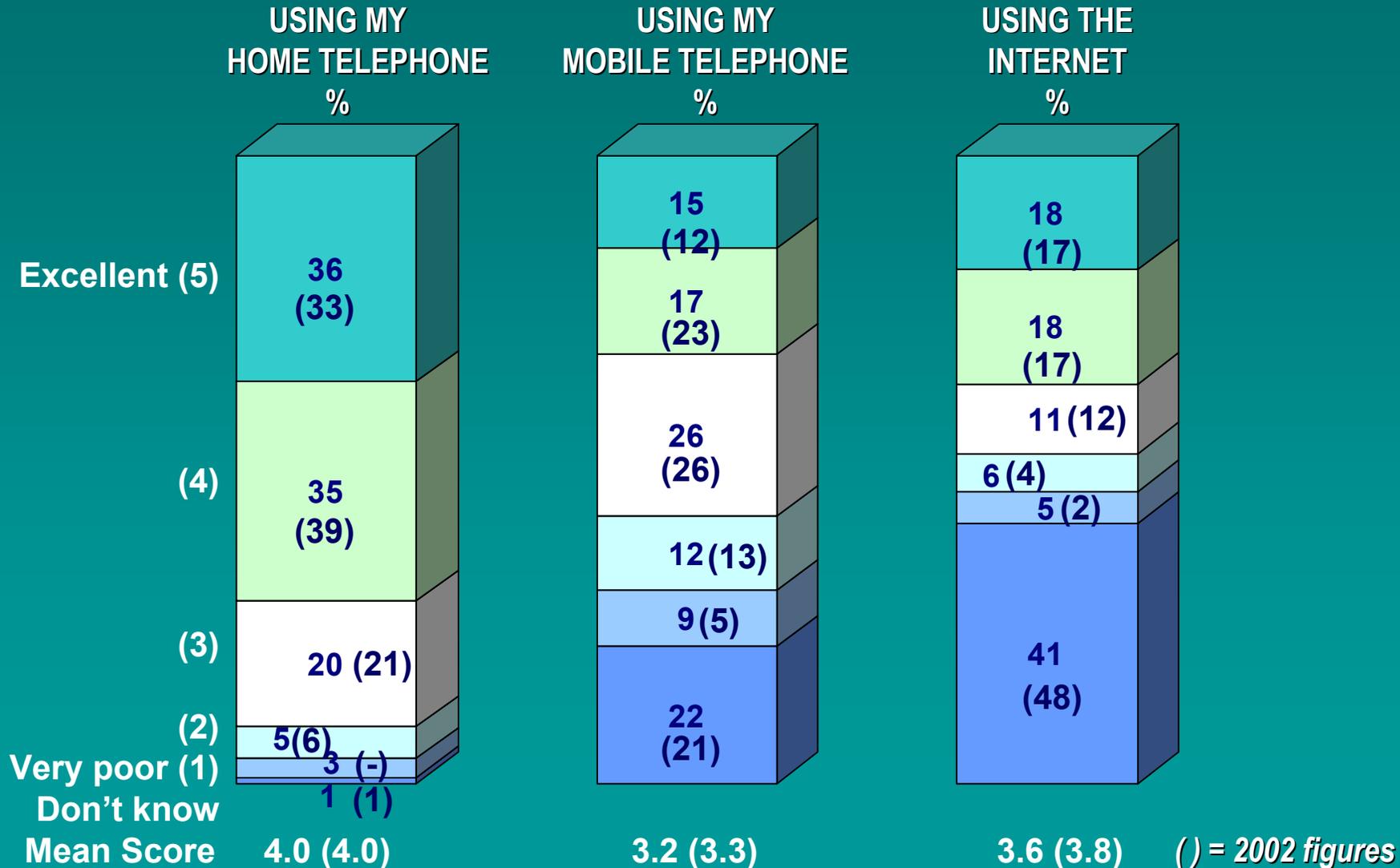


General Attitudes Towards Telecommunications



Rating Of Services For Value For Money

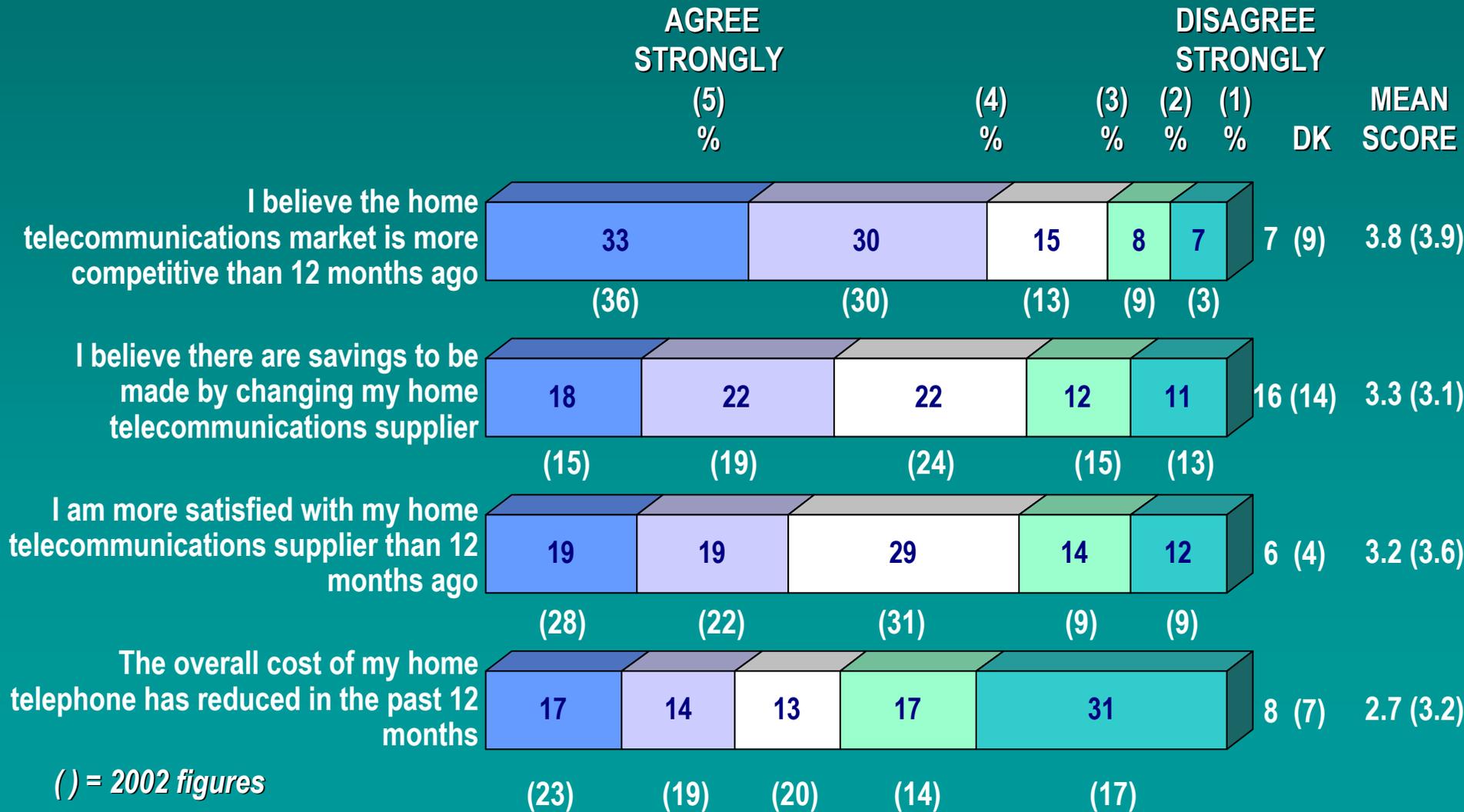
(Base: All Respondents: 500)





Agreement With Statements Relating To The Telecommunications Market

(Base: All Respondents: 500)



() = 2002 figures

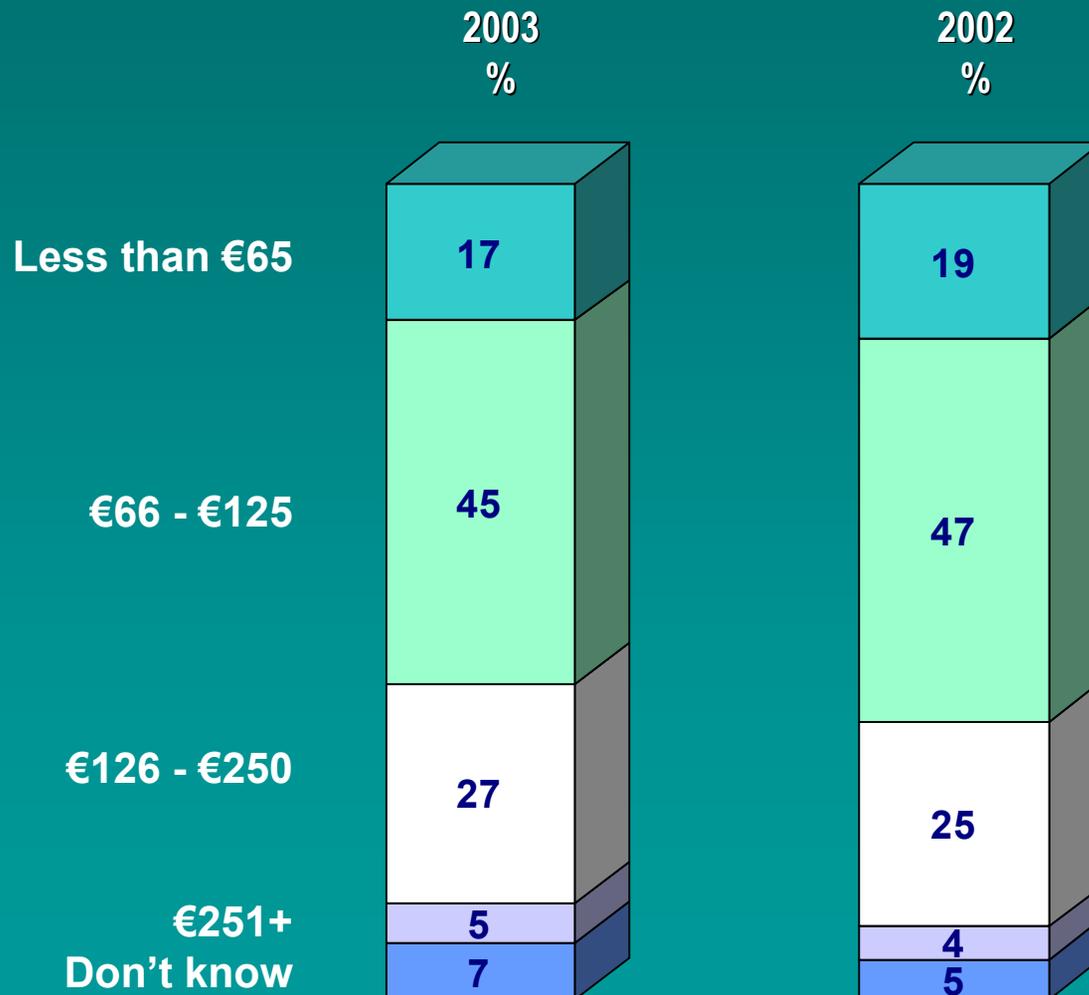


Fixed Line Sector



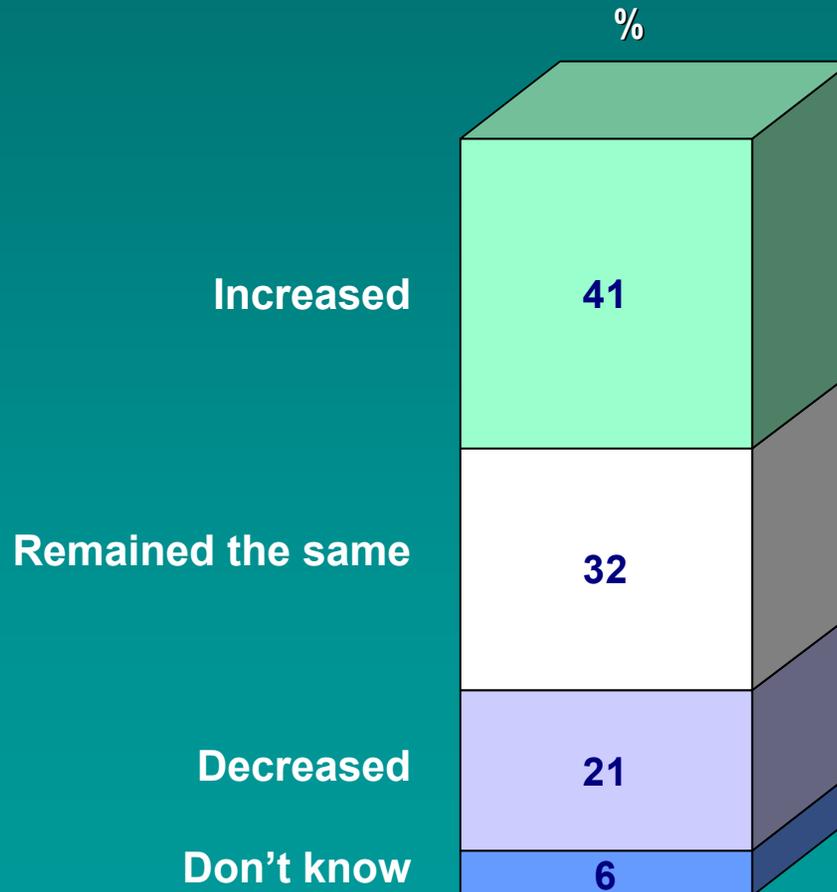
Average Bi-Monthly Telephone Bill

(Base: All Respondents: 500)





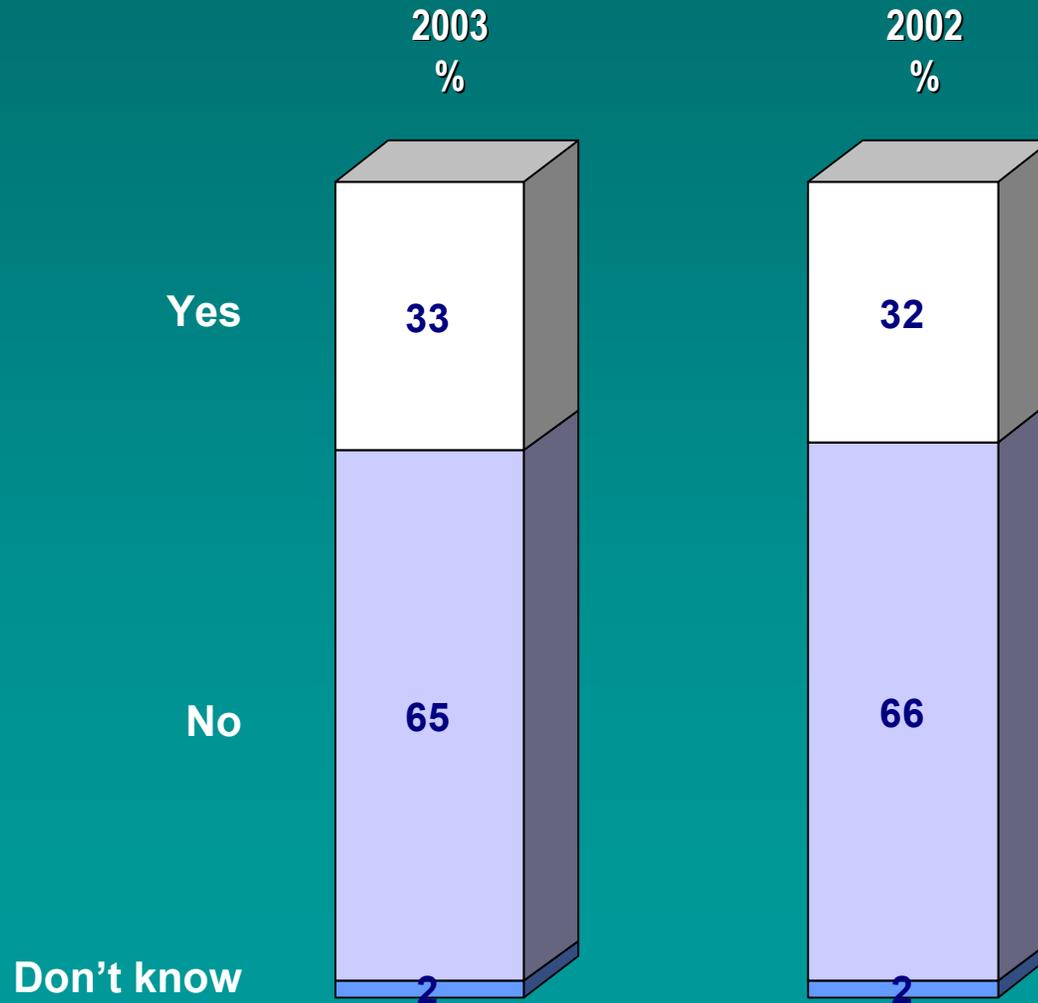
Change In Telephone Bill Amount Over The Past Two Years ***(Base: All Respondents: 500)***





Awareness Of Carrier Pre-Selection

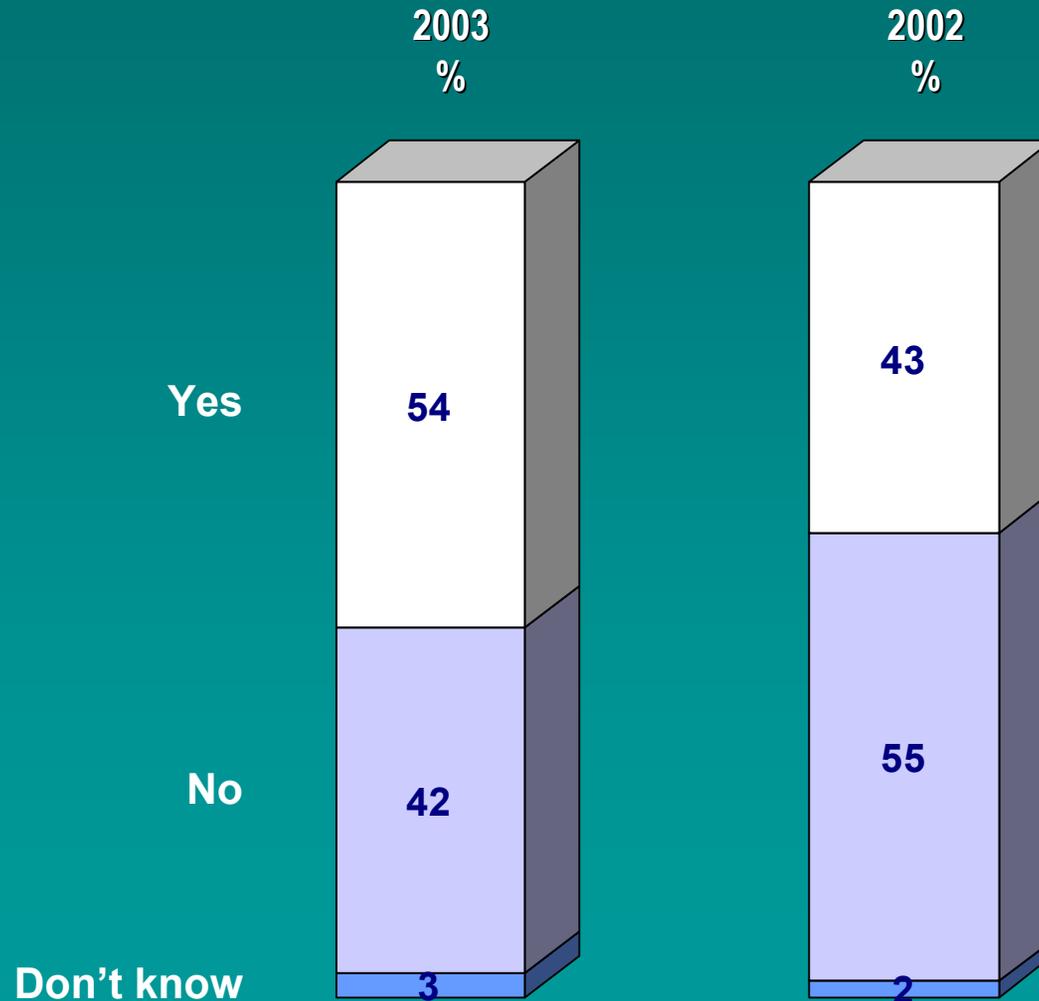
(Base: All Respondents: 500)





Ever Been Approached By Telecommunications Suppliers Other Than eircom

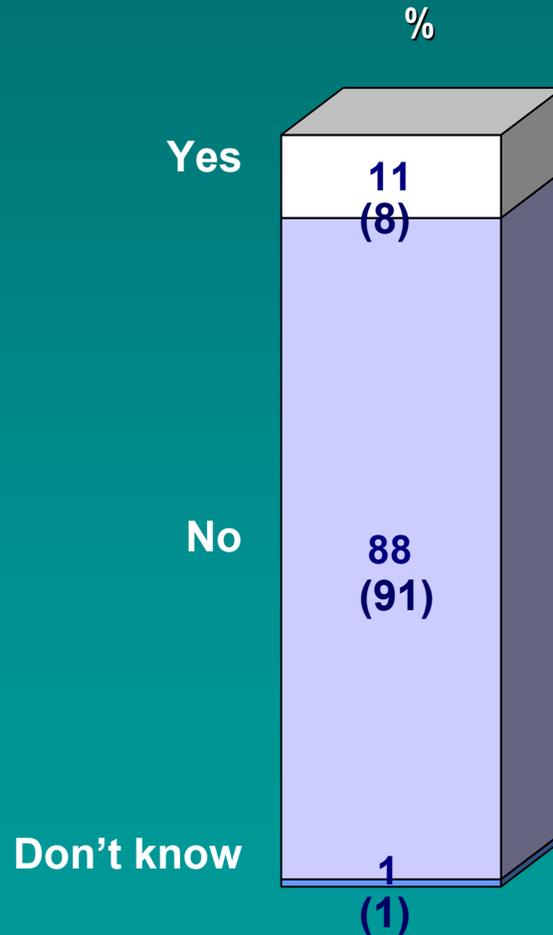
(Base: All Respondents: 500)





Telecommunications Suppliers Used Other Than eircom For Landline Calls

(Base: All Respondents: 500)

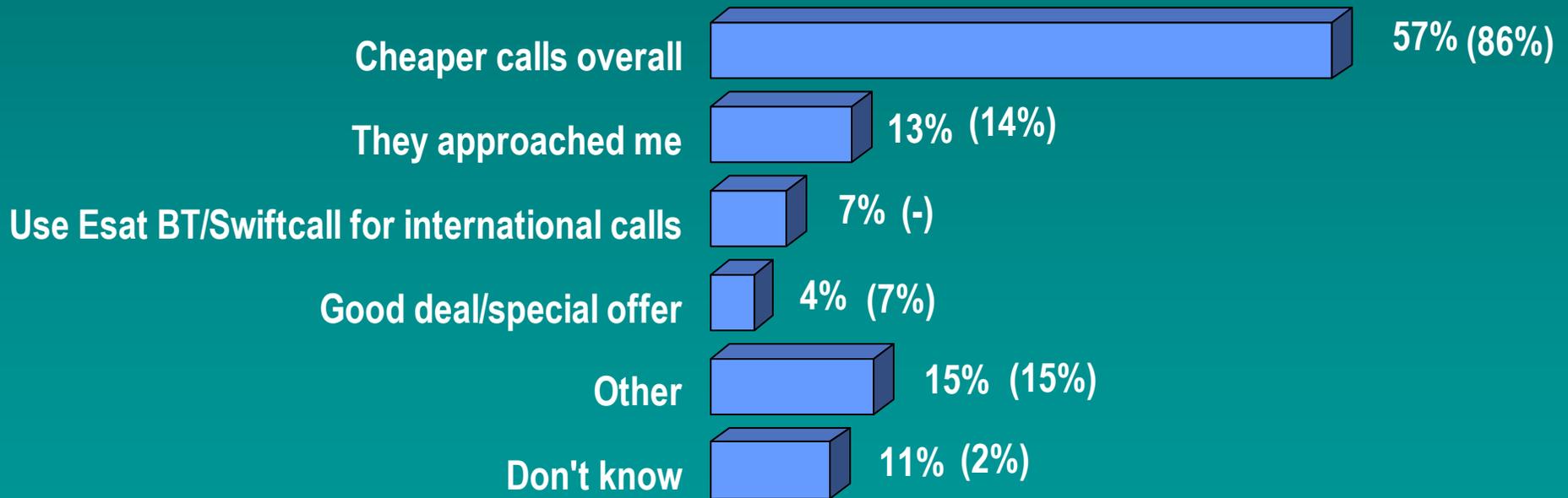


() = 2002 figures



Main Reasons For Switching Supplier Of Home Telephone Services From eircom

(Base: All using a supplier other than eircom for fixed line telephone: 54)

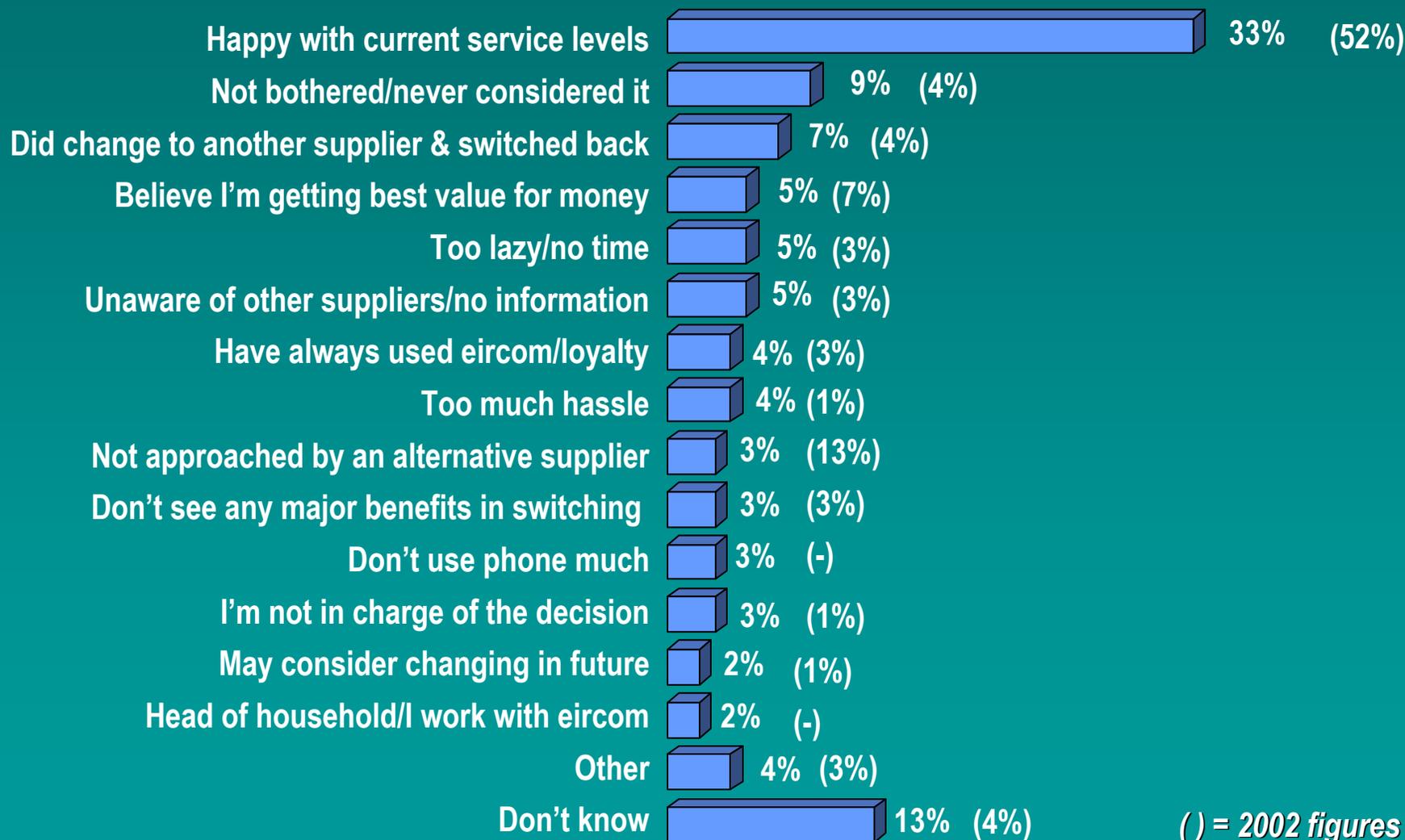


() = 2002 figures



Reasons For Not Considering A Change In Supplier

(Base: All not using a supplier other than eircom for fixed line telephone: 446)

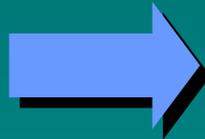
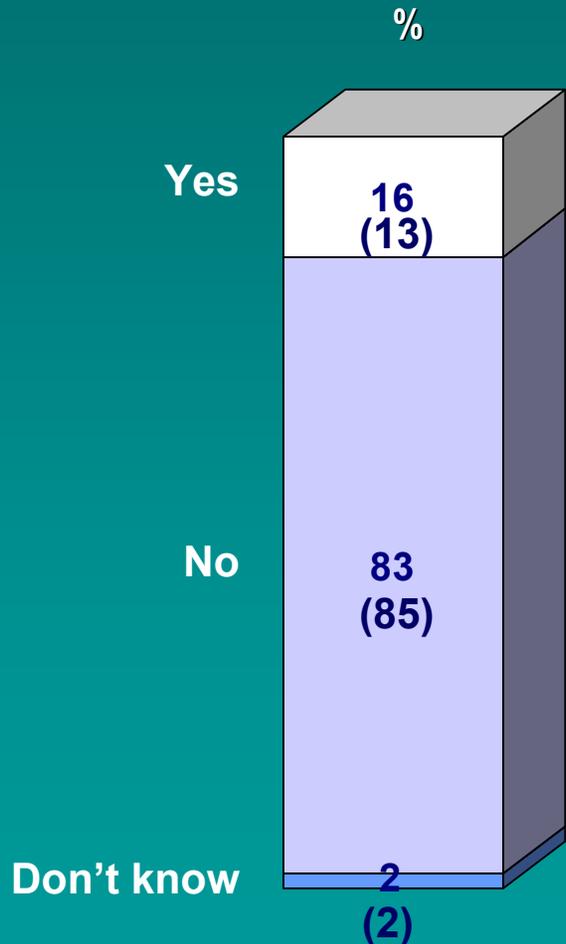


() = 2002 figures



Whether Switched Back To eircom & Reasons Why

(Base: All not using a supplier other than eircom for their fixed line calls: 446)



Main Reasons For Switching Back to eircom (Base: 69)

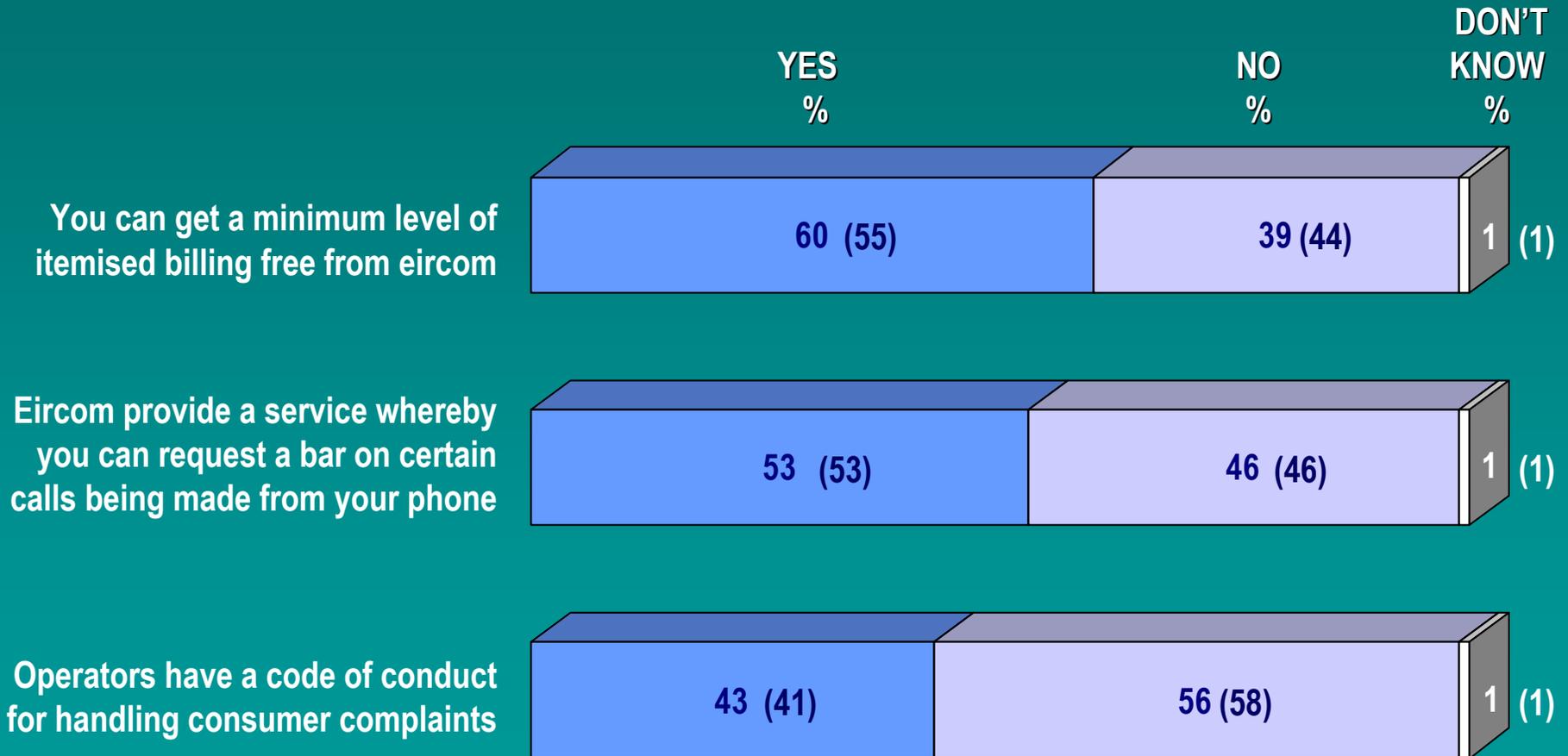
Reason	%
Cheaper calls overall	32
Found having two bills awkward	18
eircom are more reliable overall	7
Good deal/special offer	6
They approached me	5
Less hassle	5
Offered as part of an overall package	3
Too long to dial extra numbers	3
Lower minimum charge	2
Other	19
Don't know	4

() = 2002 figures



Awareness Of Different Operator Services

(Base: All Respondents: 500)

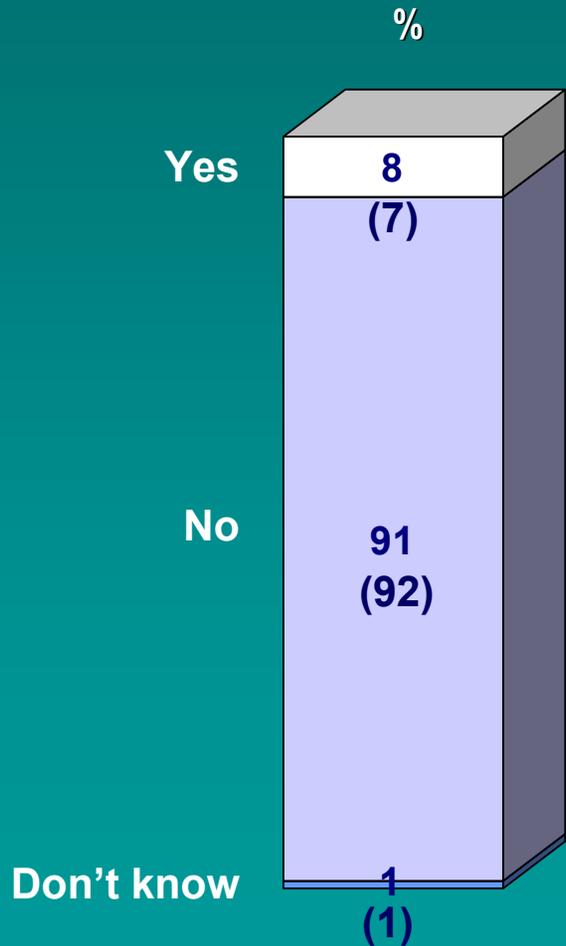


() = 2002 figures



Whether Bar Certain Calls From Phone To Control Expenditure

(Base: All Respondents: 500)



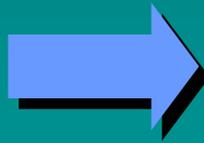
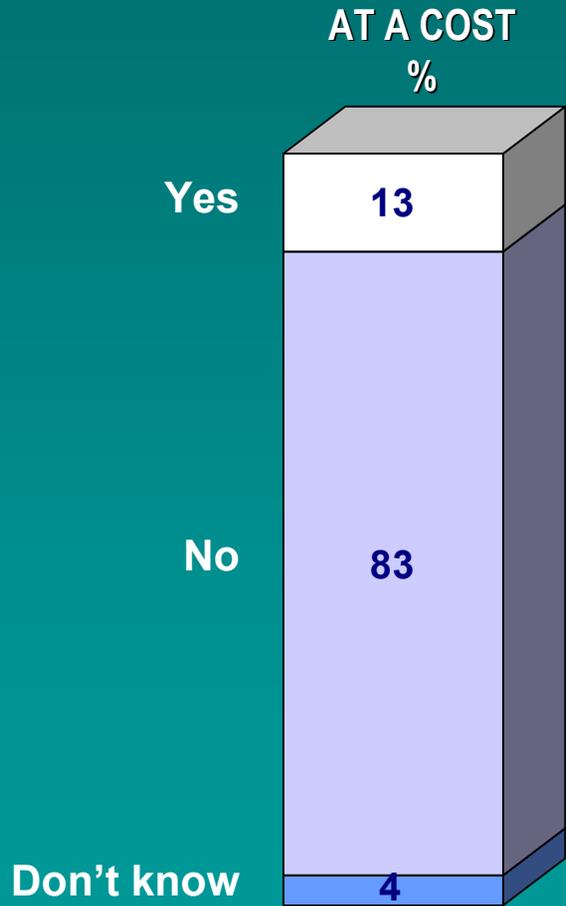
Calls Barred (Base: 42)	
	%
Mobile calls	42
International calls	28
Premium rate calls	27
National calls	14
Local calls	9
Other calls	9
Don't know	7

() = 2002 figures



Whether Would Use A Prepayment System Where A Certain Amount of Call Expenditure Is Paid In Advance

(Base: All Respondents: 500)

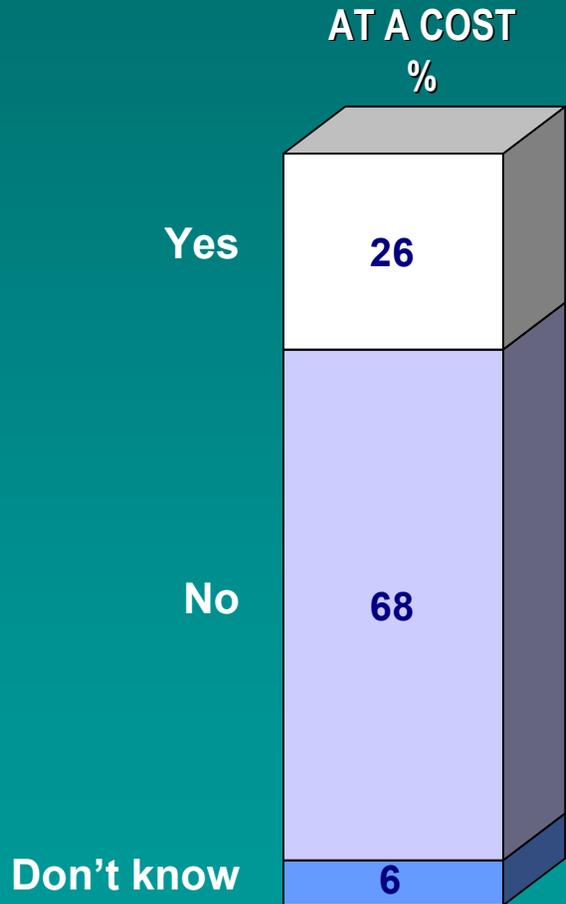


If It Were Free (Base: 434)	
	%
Yes	42
No	48
Don't know	10



Whether Would Use A Facility For Checking The Level Of Call Spend Prior To The Bill Issue Date

(Base: All Respondents: 500)

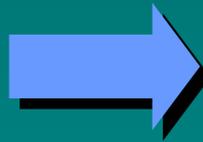
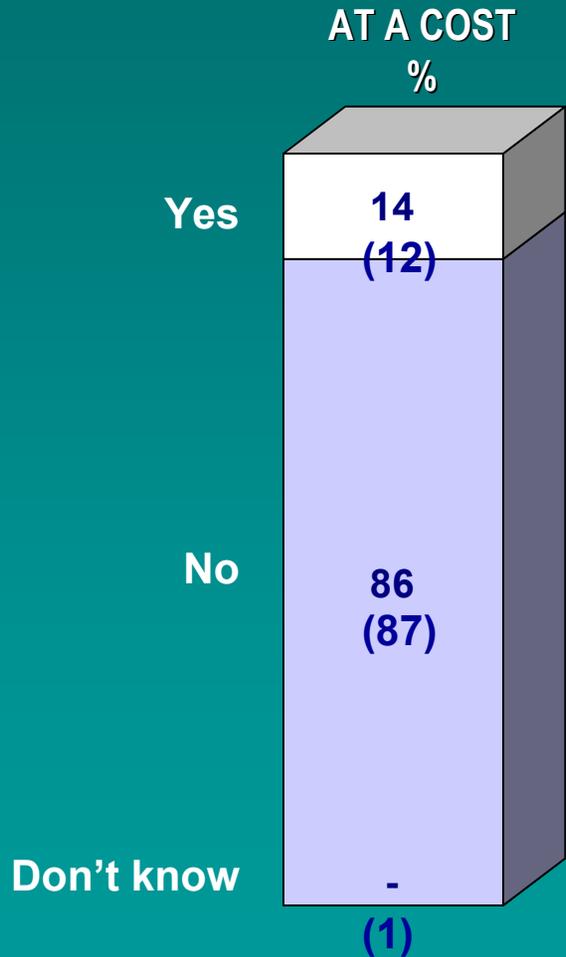


If It Were Free (Base: 370)	
	%
Yes	46
No	44
Don't know	10



Whether Ever Been Disconnected By Service Provider

(Base: All Respondents: 500)



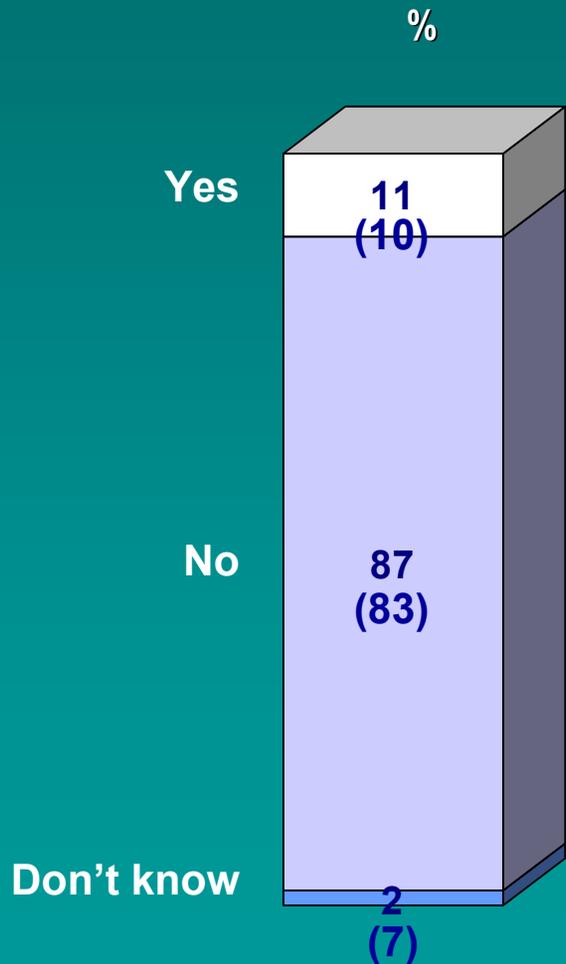
Adequate Notice Given (Base: 73)	
	%
Yes	33
No	57
Don't know	9

() = 2002 figures



Whether Any Difficulties Encountered If Had Cause To Make A Complaint

(Base: All Respondents: 500)

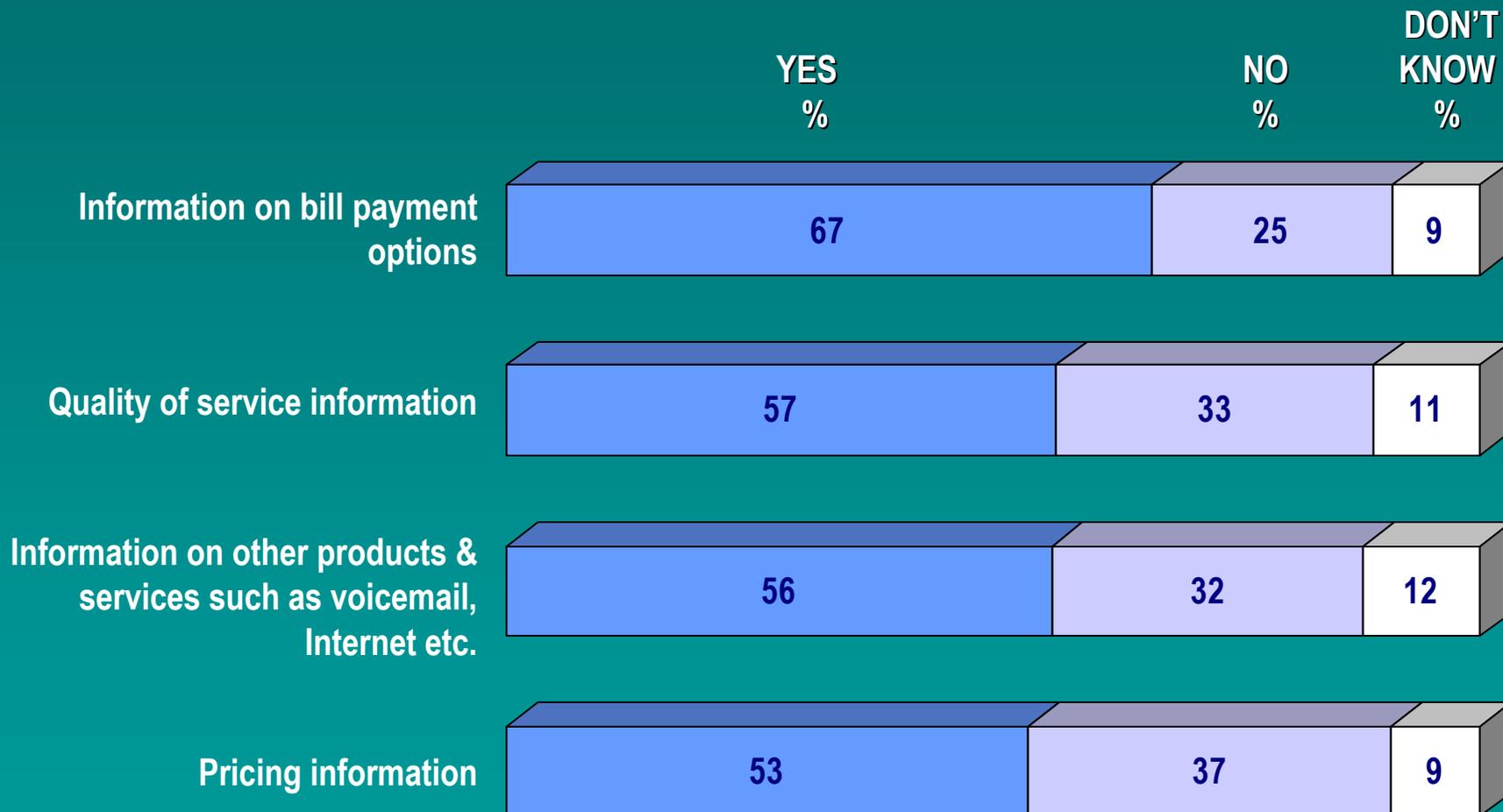


Difficulties Encountered (Base: 51)	
	%
Complaint took protracted length of time to resolve	34
Not listened to/rude/unhelpful staff	23
Billed when service not used	14
Unable to make contact with operator	7
Kept being referred/re-routed	6
No response from operator	2
Other	13

() = 2002 figures



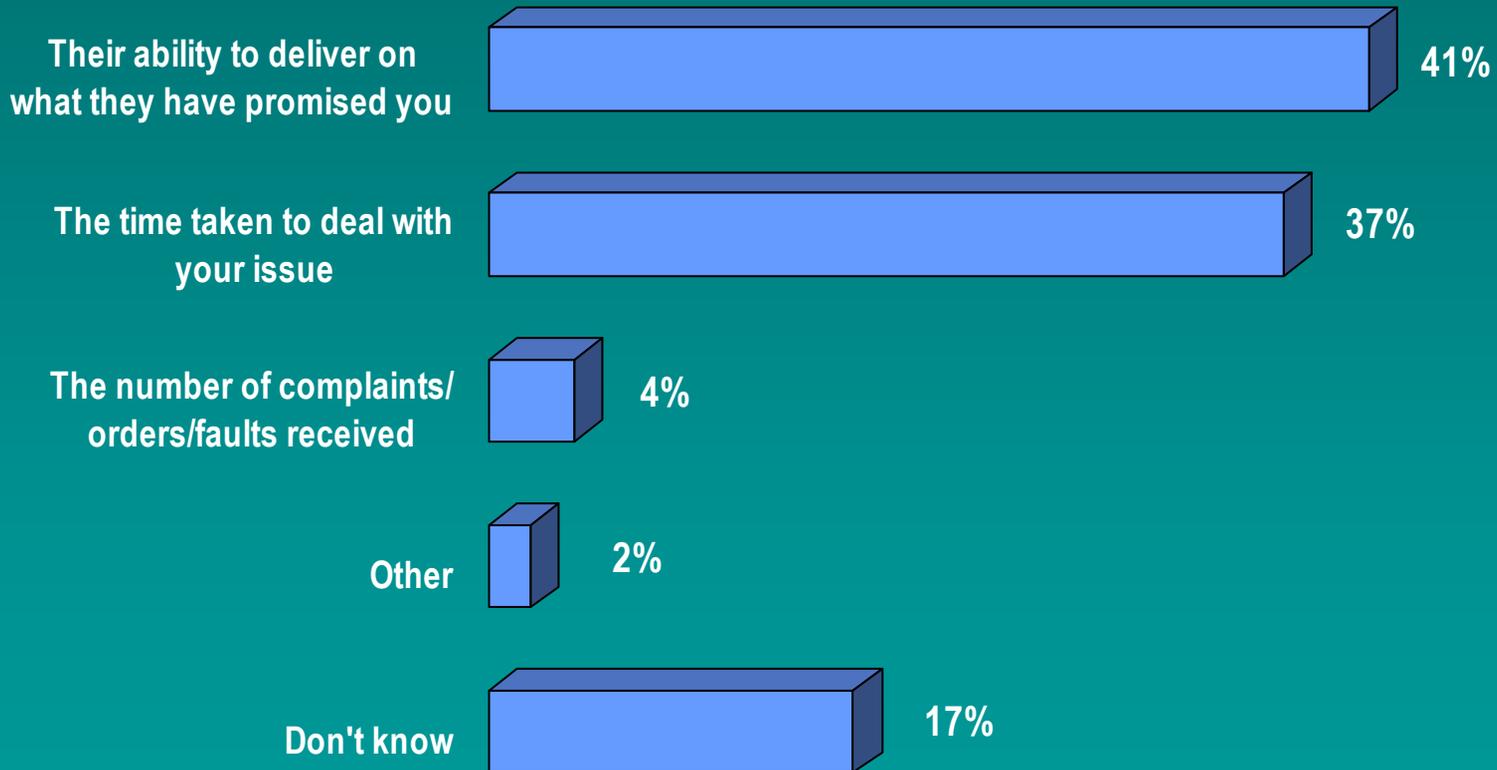
Whether There Is Sufficient Information Available To Help Choose A Home Telephone Supplier ***(Base: All Respondents: 500)***





The Most Useful Performance Indicator To Assess Operator Handling Of Any Complaints, Orders Or Faults

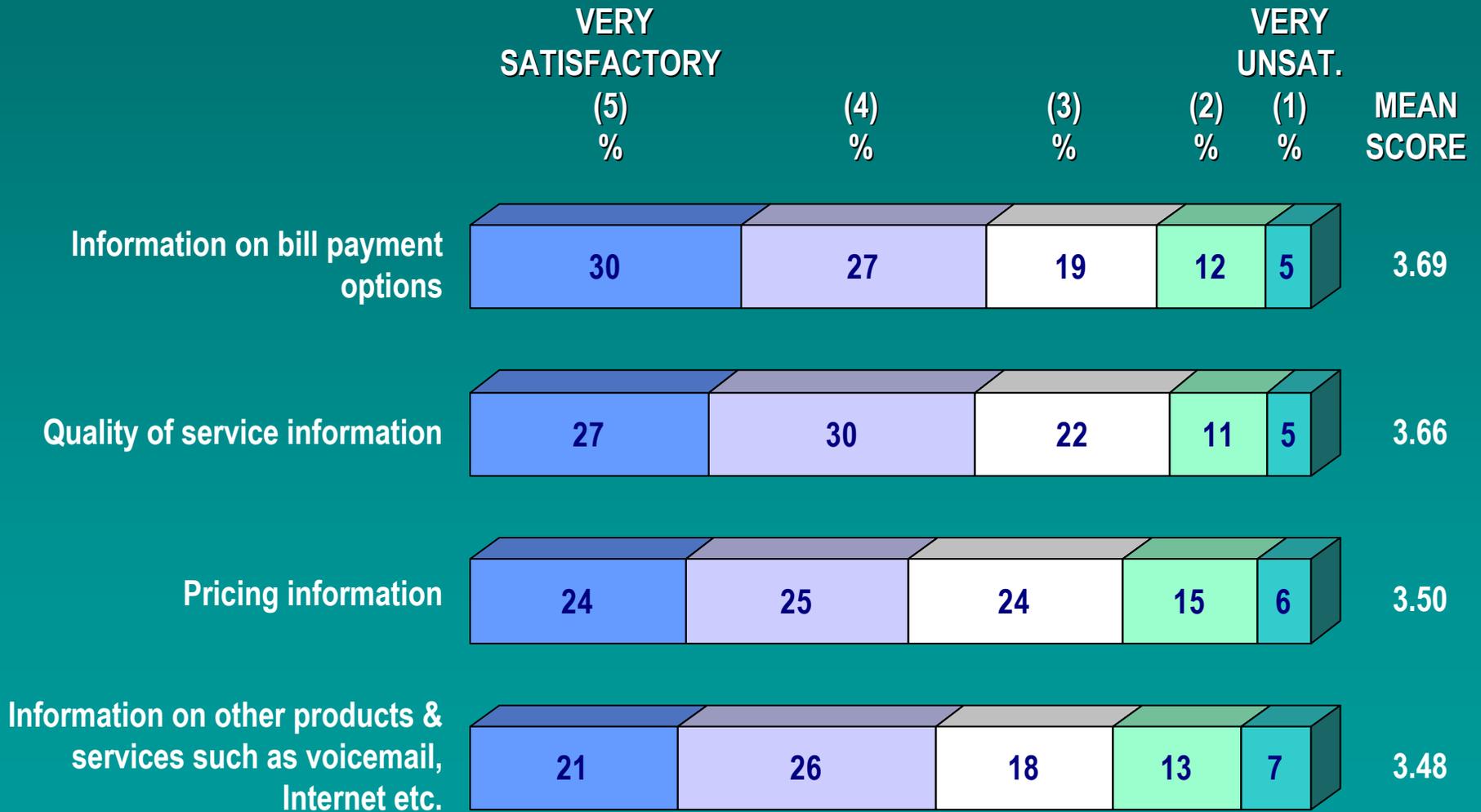
(Base: All Respondents: 500)





Rating Of Different Aspects Of Fixed Line Supplier's Quality of Service

(Base: All Respondents: 500)



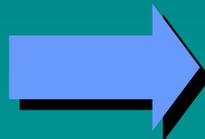
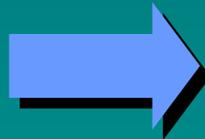
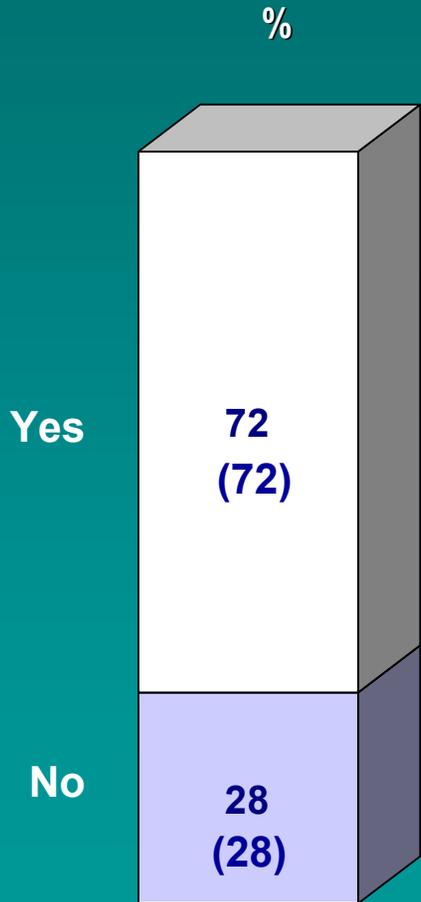


Mobile Sector



Regular Use Of A Mobile Phone

(Base: All Respondents: 500)



Mobile Phone Supplier (Base: 358)		
	%	()
Vodafone	58	(59)
O2	36	(35)
Meteor	2	(2)
Don't know	3	(4)

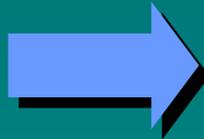
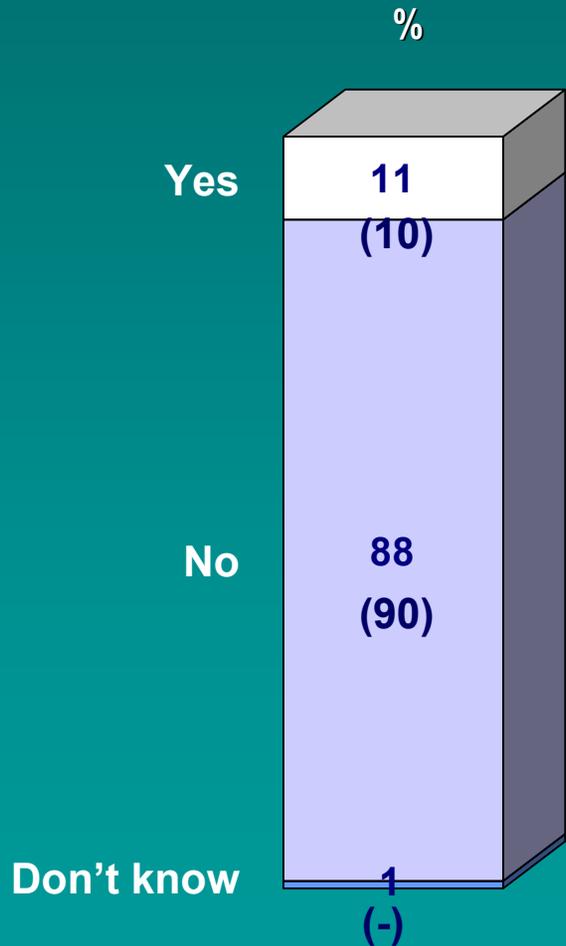
Payment Method (Base: 358)		
	%	()
Get bills	32	(35)
Buy cards & pay in advance	67	(65)

() = 2002 figures



Whether Switched Mobile Supplier In The Past Twelve Months (I)

(Base: All mobile phone users: 358)



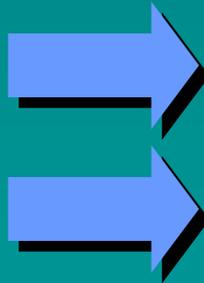
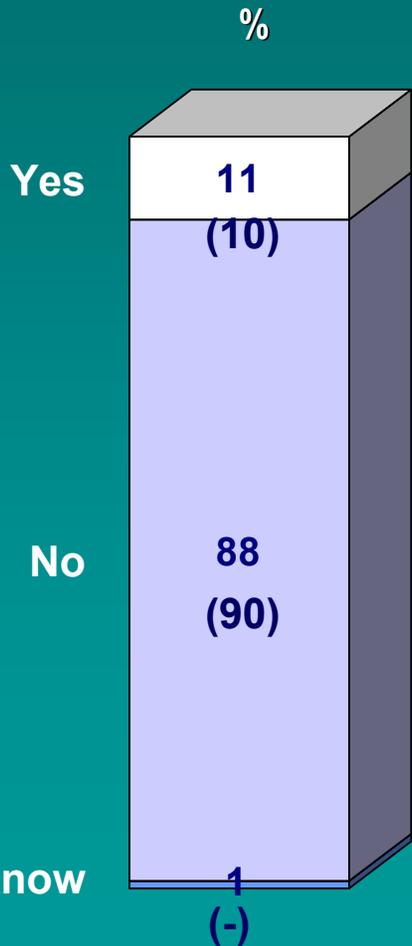
Main Reasons For Switching (Base: 39)	
	%
Changed phone	39
Cheaper calls overall	23
Better coverage/network	11
Good deals/special offer	11
Customer service better	10
Individual issue/problem with previous supplier	5
Interested to see what another company was like	2
No particular reason	12
Don't know	5

() = 2002 figures



Whether Switched Mobile Supplier In The Past Twelve Months (II)

(Base: All mobile phone users: 358)



Main Reasons For Not Considering Switching (Base: 320)

	%
Happy with current service levels	43
Coverage issues	7
Believe getting best value for money	5
Never thought about it/not bothered	5
Company decision/phone	5
I want to keep my own number	4
Not a heavy mobile user/no need to	4
Too difficult/too much hassle	3
Not aware of other packages/suppliers	2
Got phone as a gift	2
Other	13
No reason	5
Don't know	11

Whether Intend To Switch In Next 12 Months

	%
Yes	9
No	86
Don't know	6

() = 2002 figures



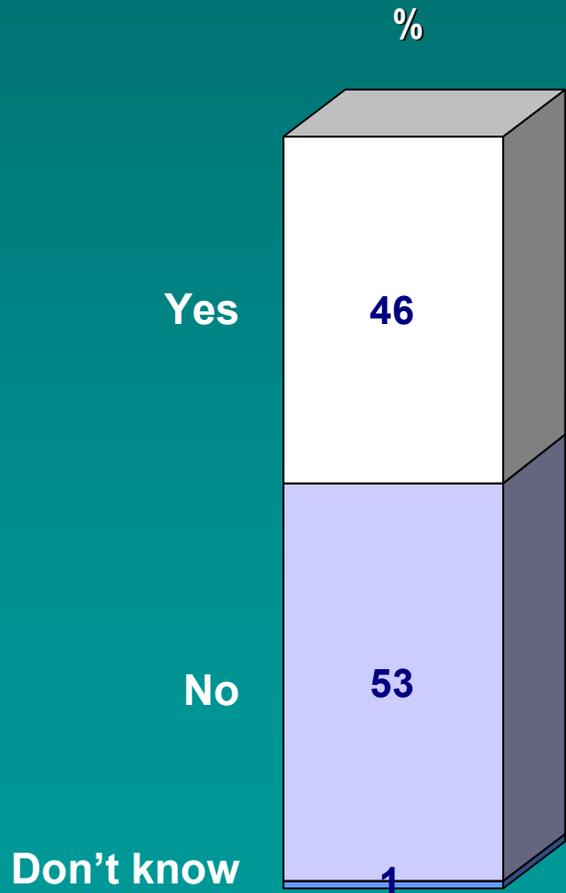
Rating Of Importance Of Different Tariff Elements

(Base: All Mobile Phone Users: 358)





Awareness Of Any Cost Difference In Calling Another Mobile Network Compared To Calling Somebody On The Same Mobile Network (Base: All mobile phone users: 358)



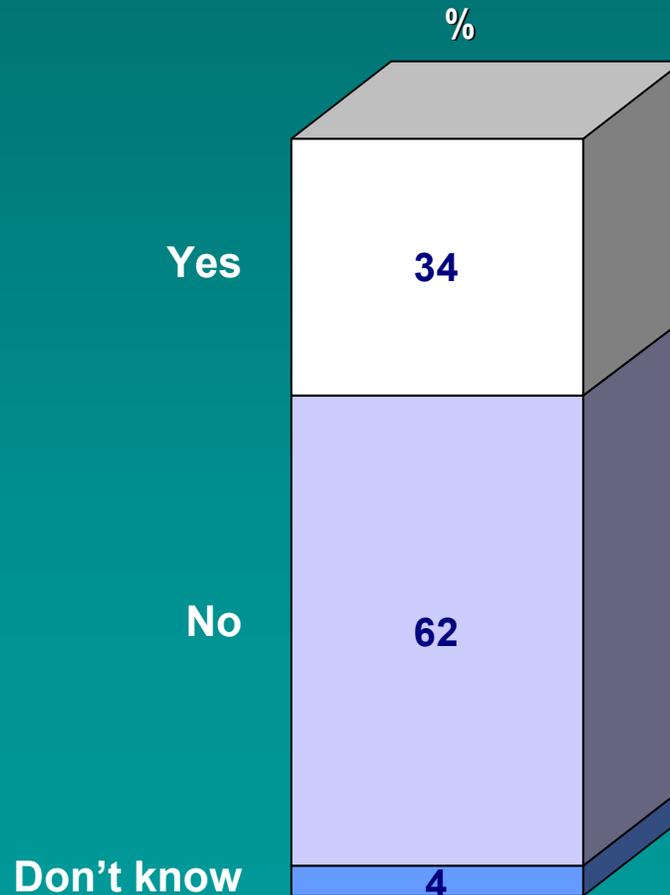
**Perceived Cost Difference Per Minute
During Peak Time**
(Base: 161)

	%
Up to 5 cent	22
6 – 10 cent	17
11 – 20 cent	11
21 – 30 cent	5
31 – 40 cent	3
41 – 50 cent	4
51 – 100 cent	5
Over €1	1
Don't know	31



Whether Choice Of Mobile Operator Based On Network Subscribed To By Those Called Most Often

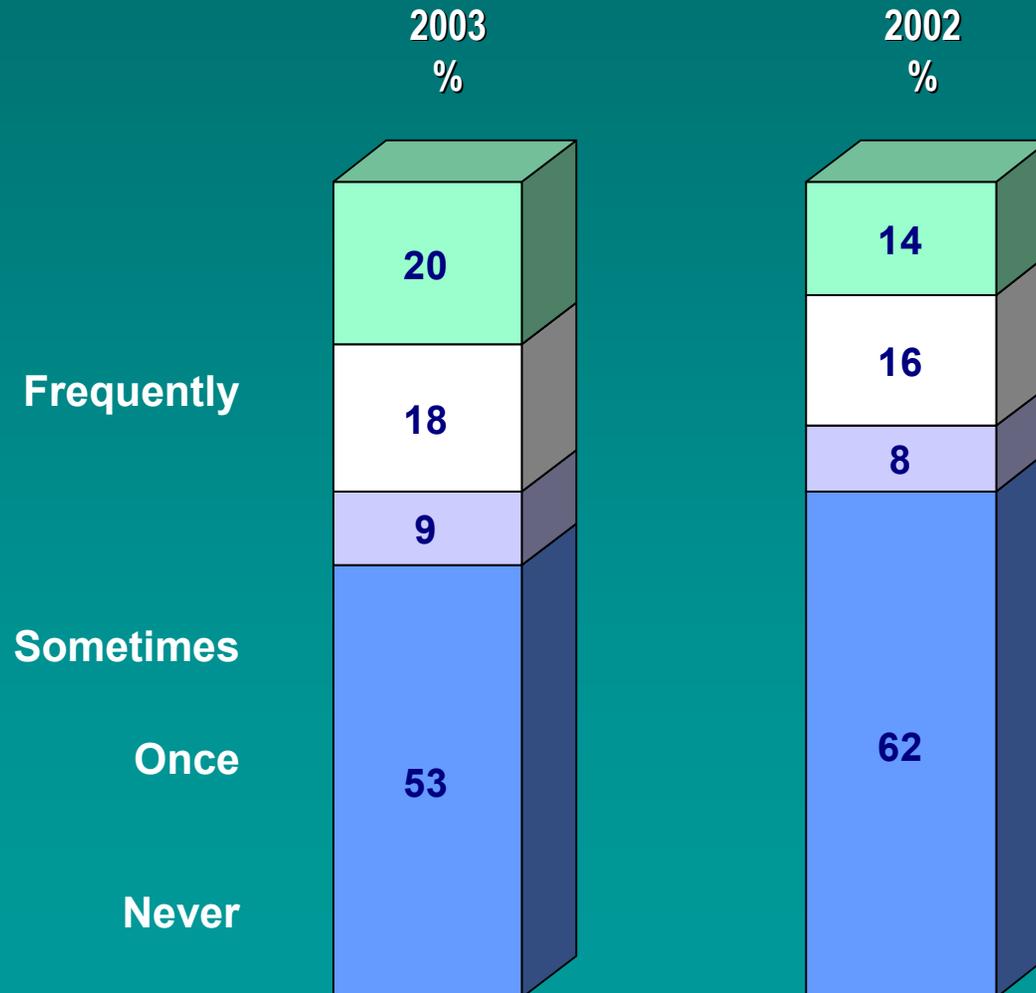
(Base: All Mobile Phone Users: 358)





Frequency Of Using Mobile Abroad

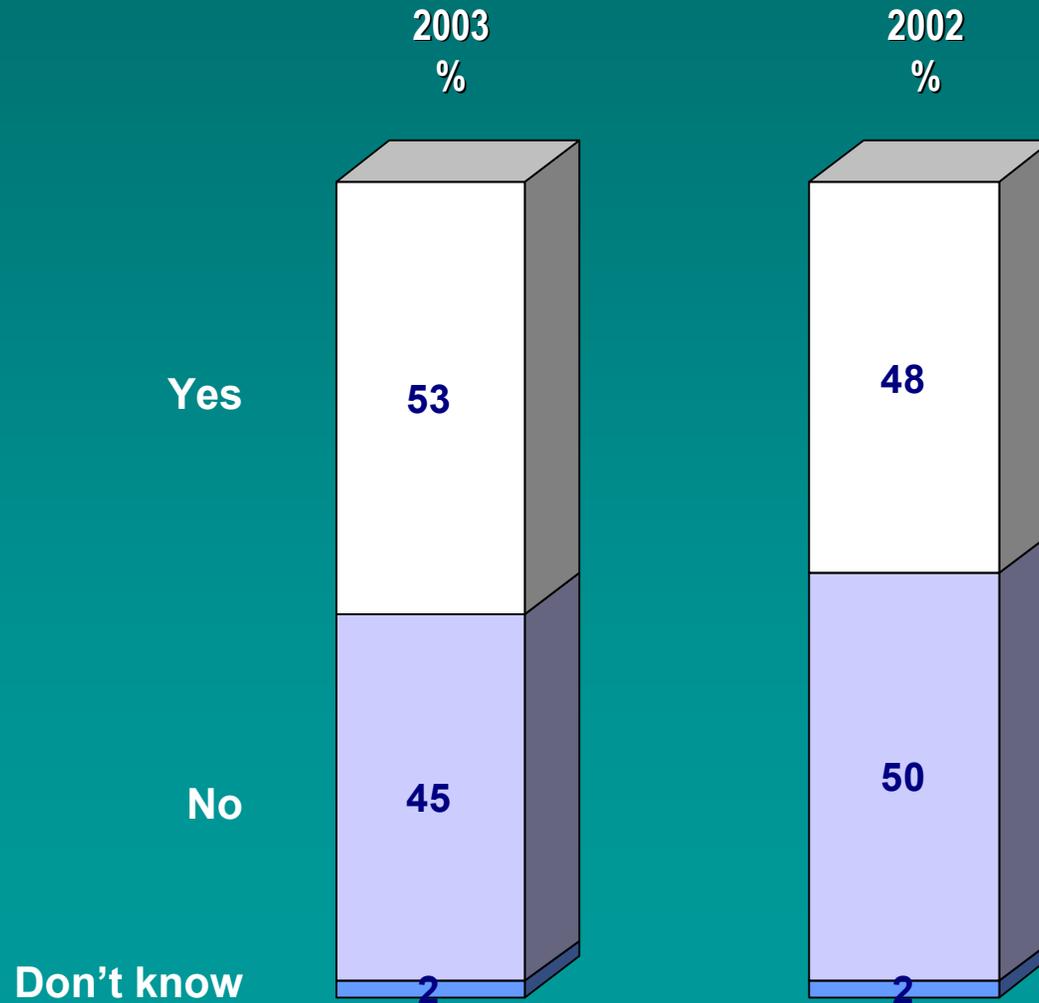
(Base: All Mobile Phone Users: 358)





Awareness Of Cost Of Using Mobile Phone Abroad

(Base: All Mobile Phone Users: 358)





Awareness Of The Cost Of Using Mobile Phone Abroad

(Base: All who have used mobile phone when abroad: 169)

2003
%

2002
%

I know exactly how much it costs to use my mobile abroad

11

6

I know roughly how much it costs to use my mobile abroad

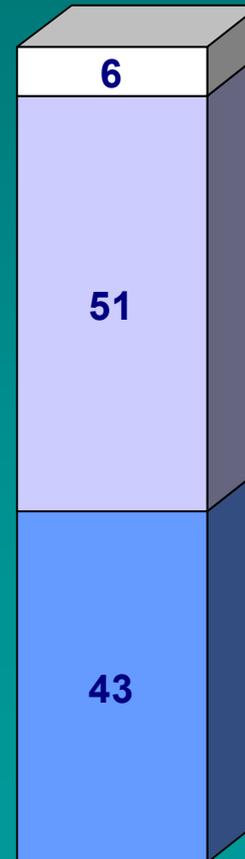
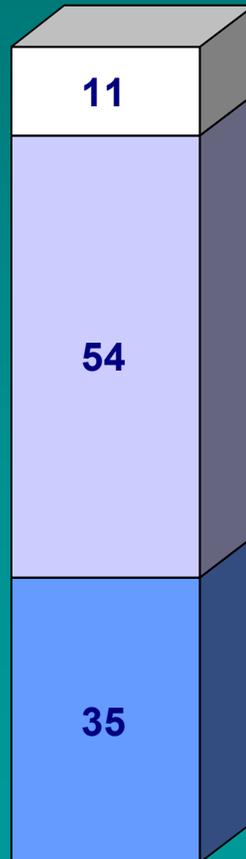
54

51

I don't really know how much it costs to use my mobile abroad

35

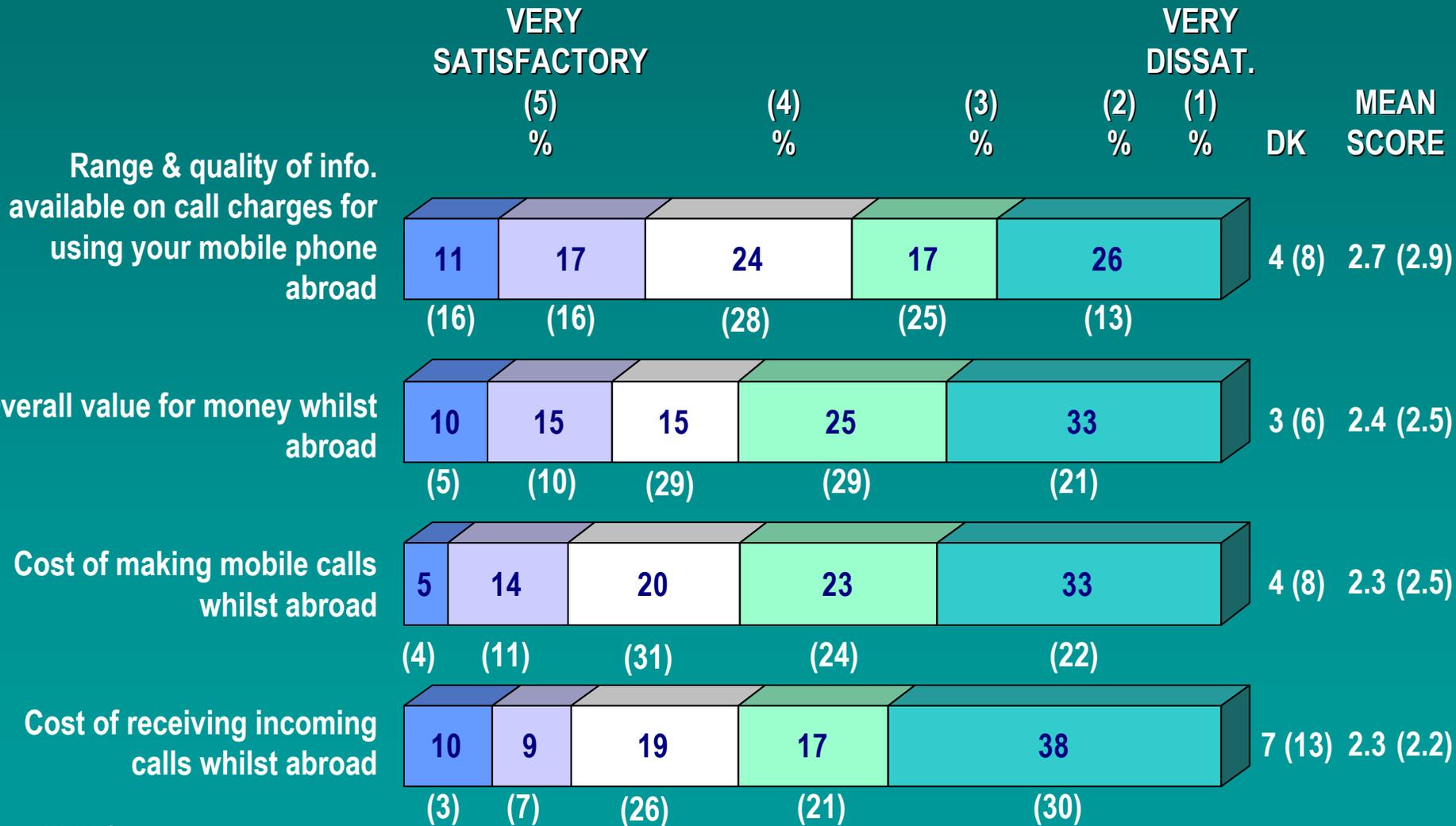
43





Satisfaction With Mobile Service When Using Abroad

(Base: All who have used mobile phone when abroad: 169)

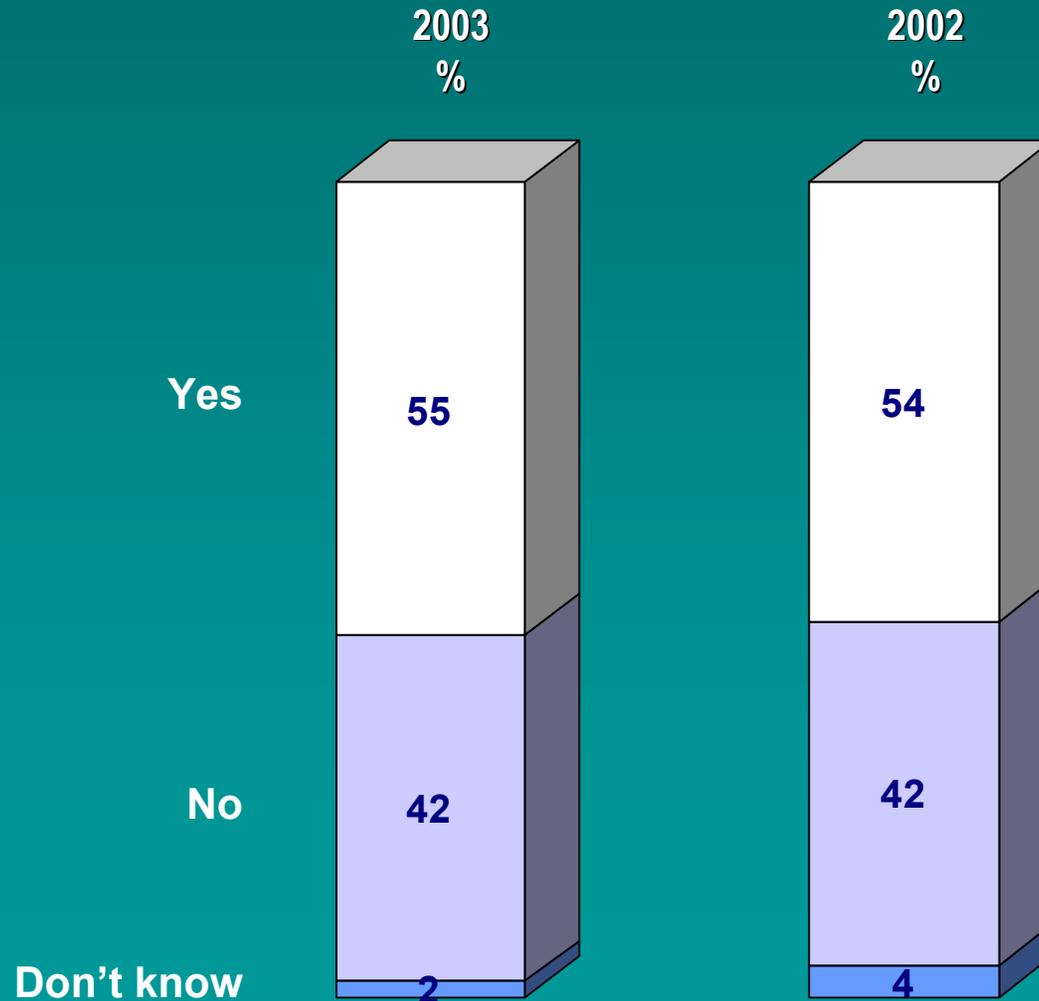


() = 2002 figures



Whether Aware That Costs Abroad Depend On Network Used

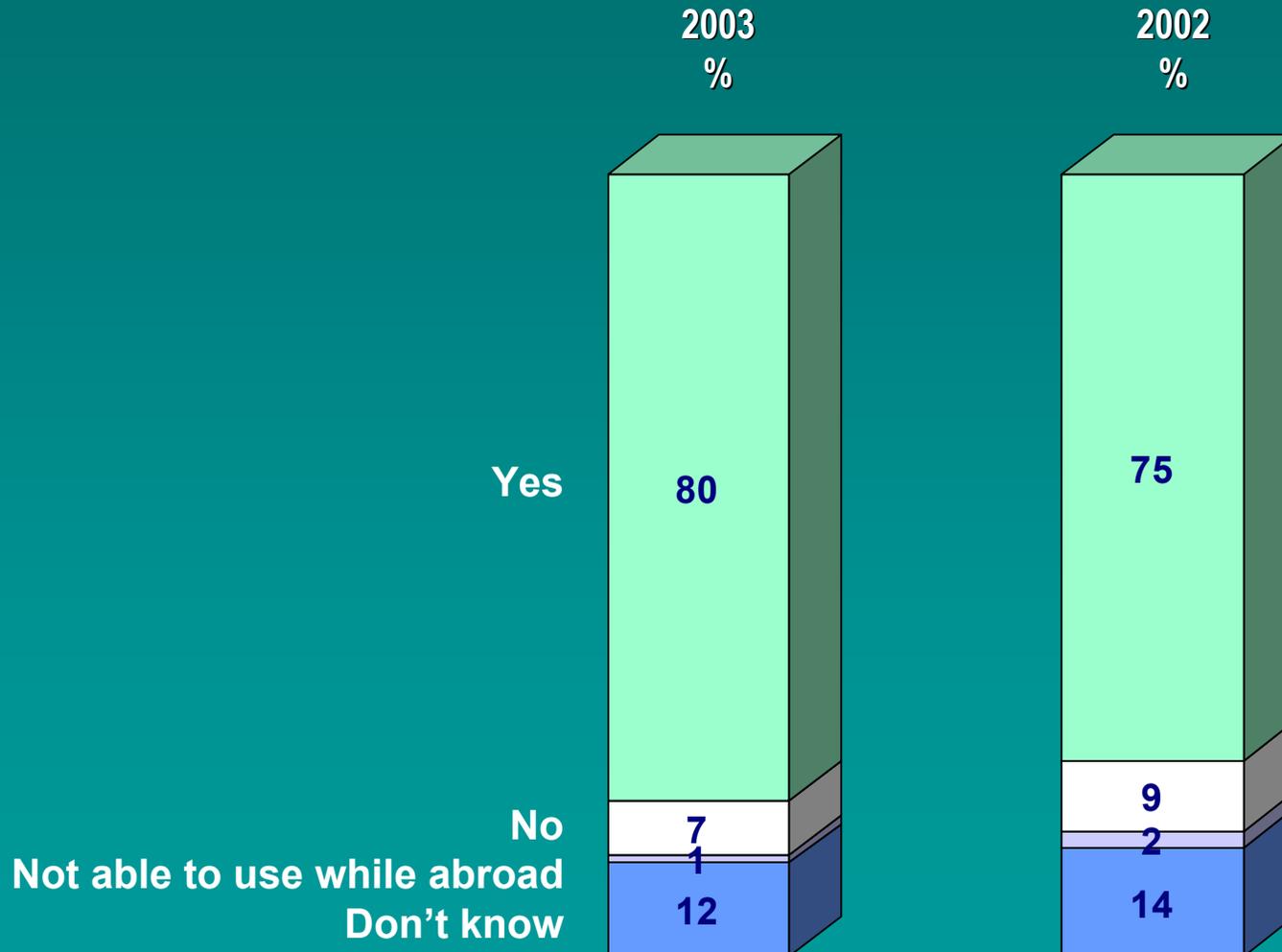
(Base: All who have used mobile phone when abroad: 169)





Whether Charged For Receiving Incoming Calls To Mobile When Used Abroad

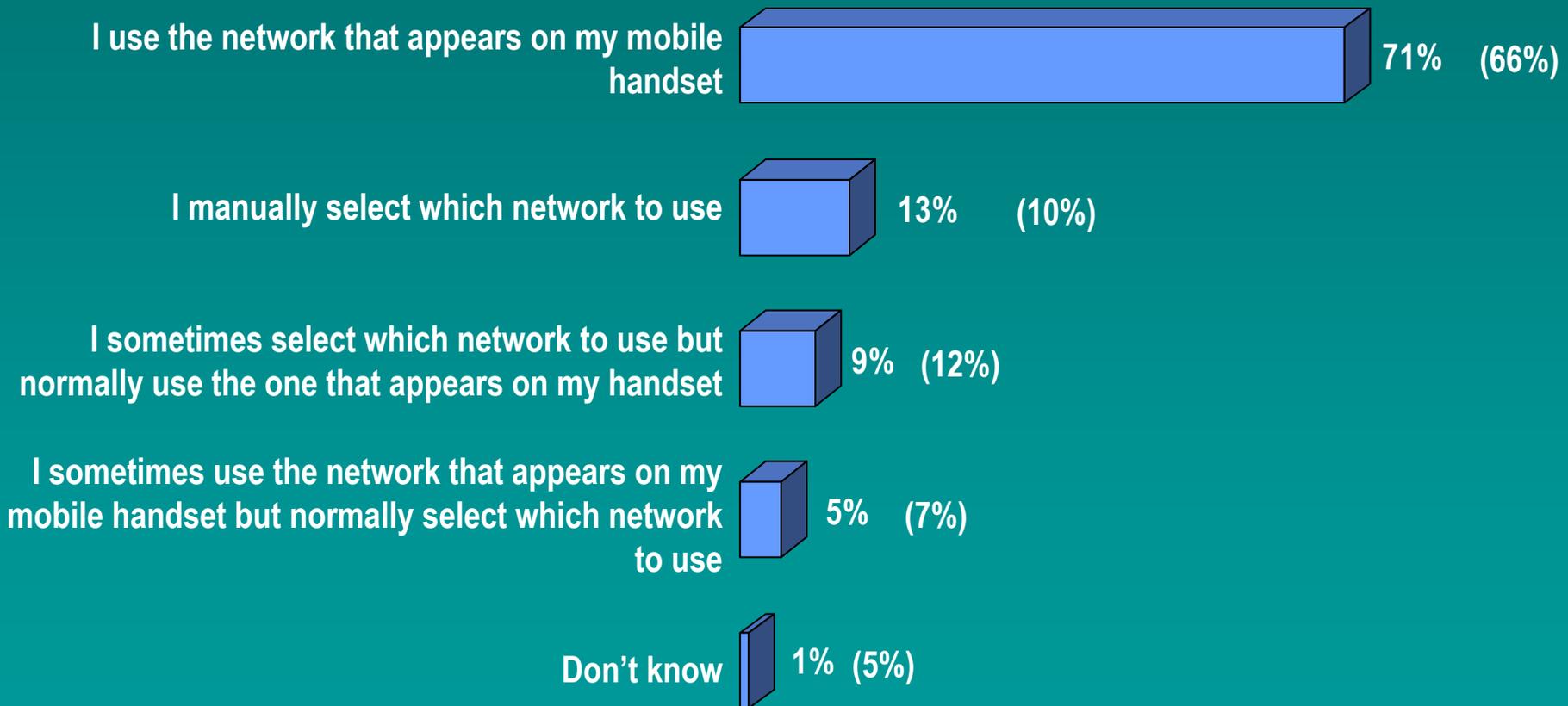
(Base: All who have used mobile phone when abroad: 169)





How Network Is Selected When Used Abroad

(Base: All who have used mobile phone when abroad: 169)

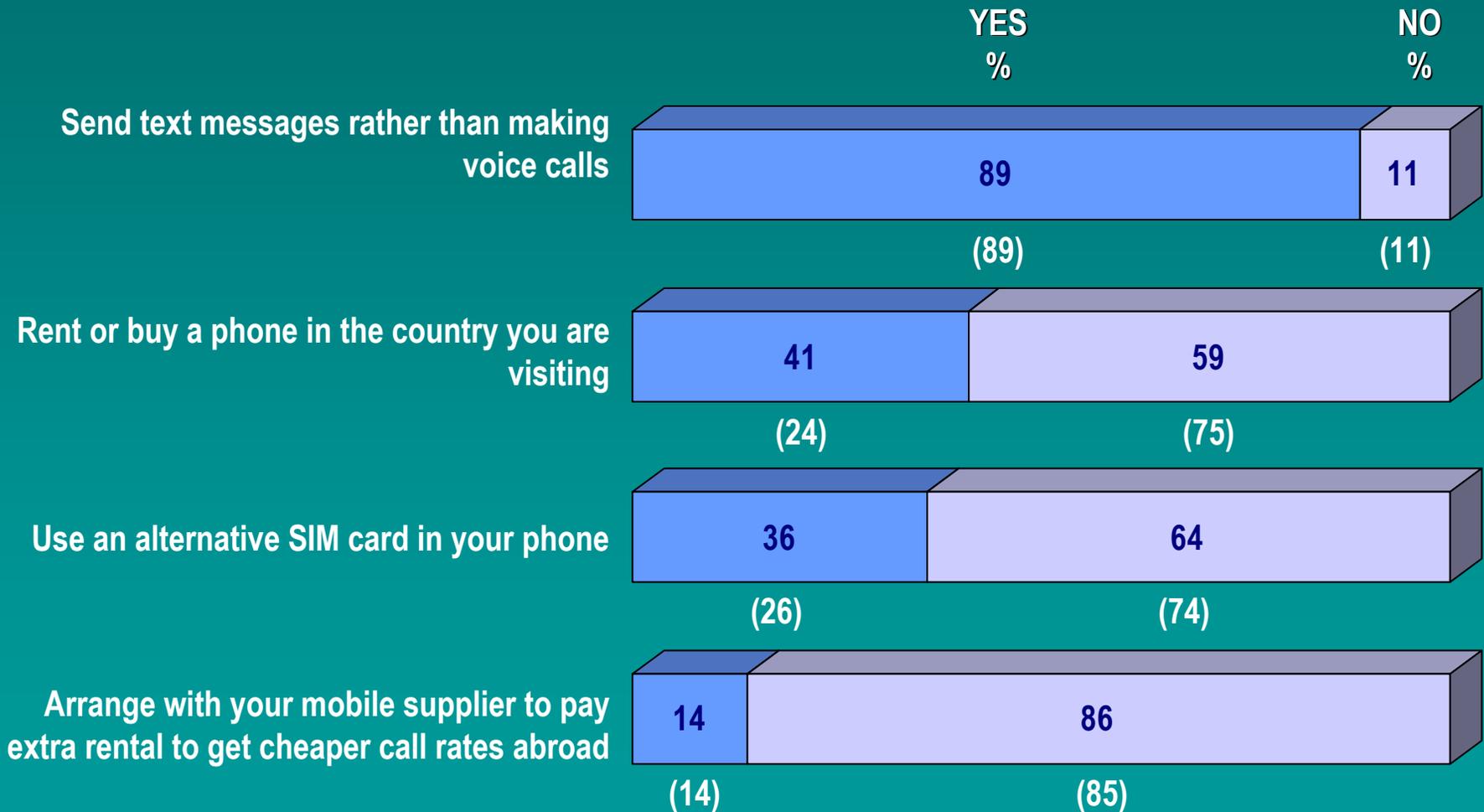


() = 2002 figures



Whether Aware Of Ways To Get Cheaper Mobile Rates Abroad

(Base: All who have used mobile phone when abroad: 169)

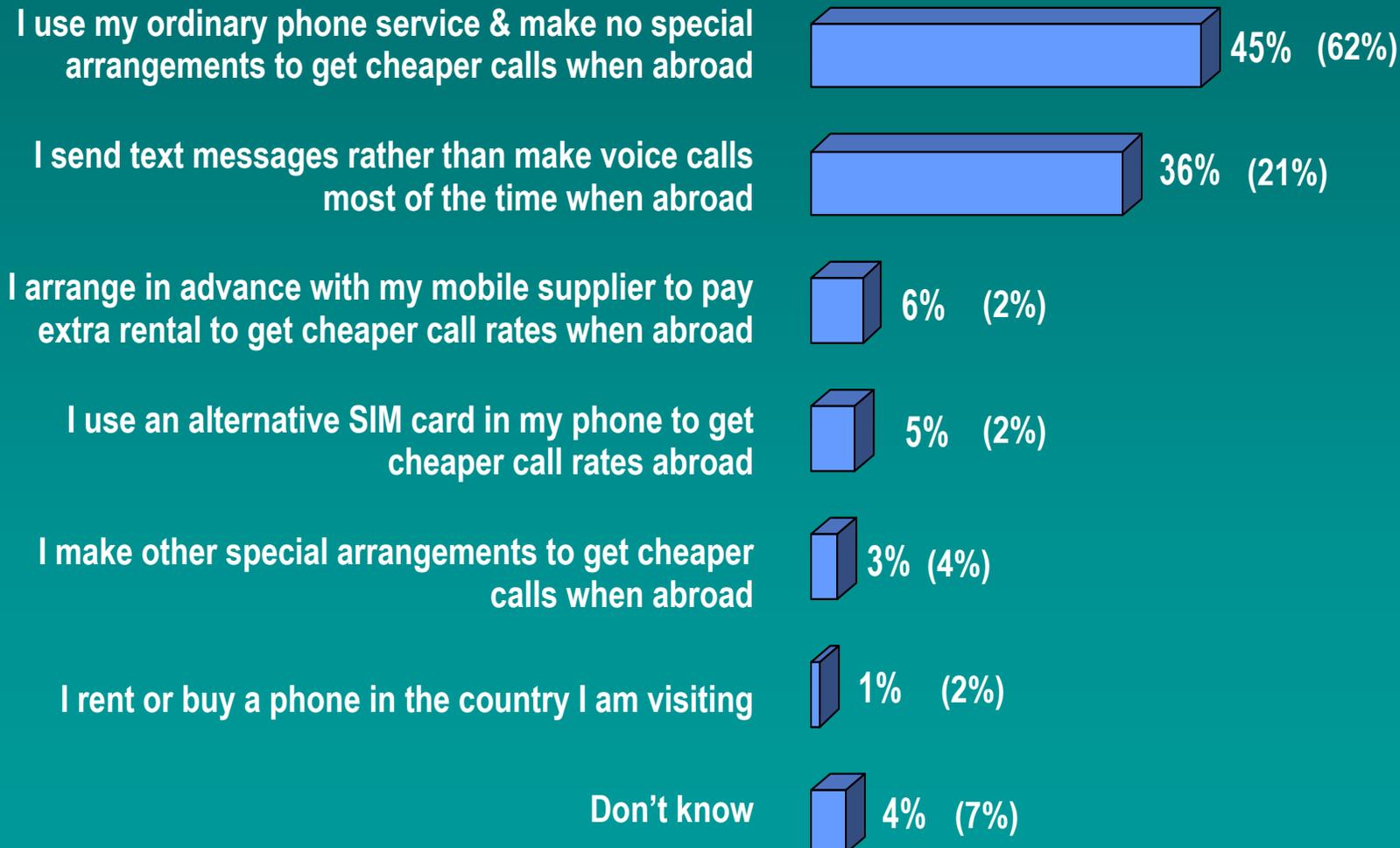


() = 2002 figures



How Mobile Phone Is Used Abroad

(Base: All who have used mobile phone when abroad: 169)



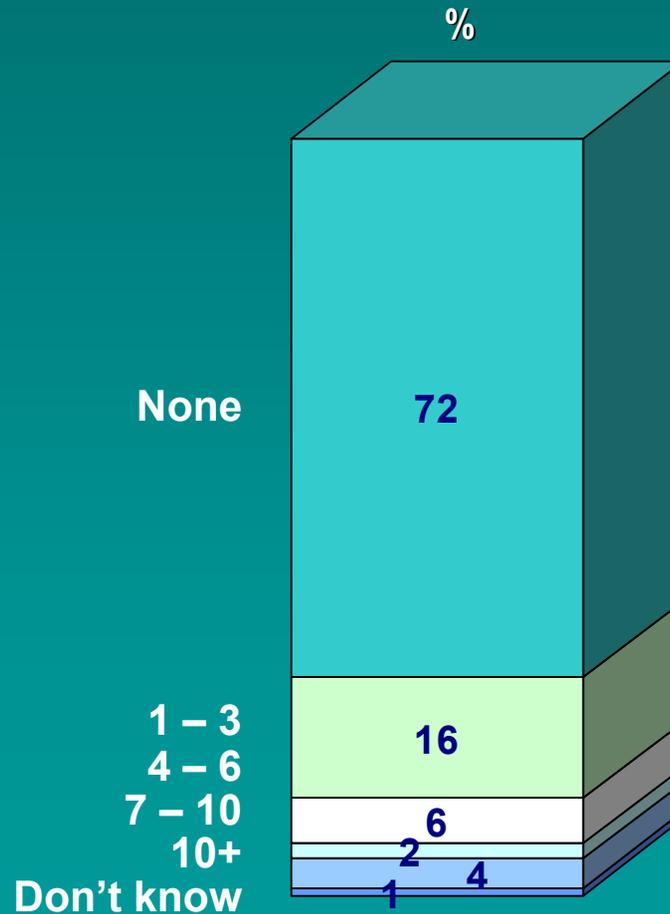
() = 2002 figures



Payphone Services



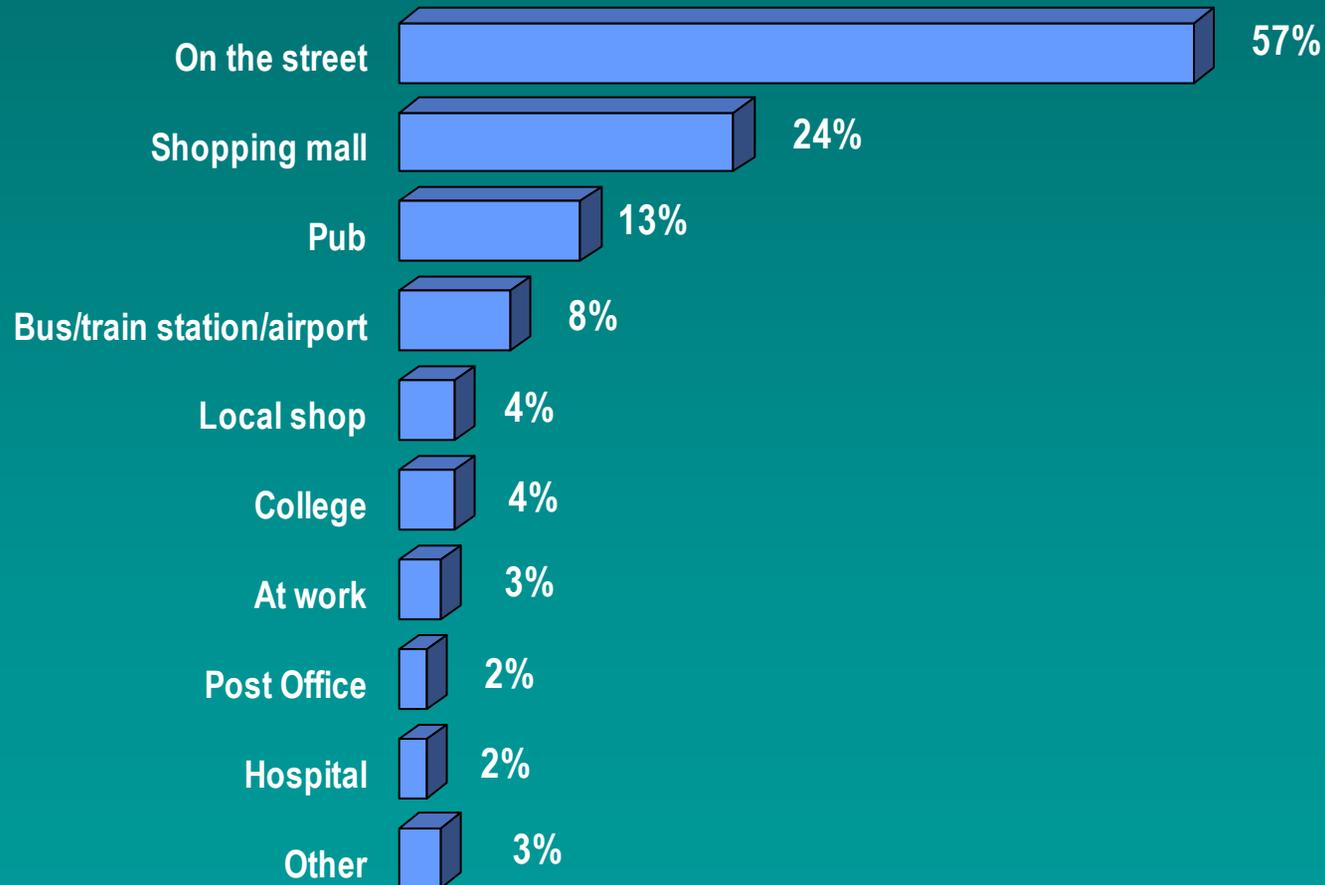
Calls Made From A Payphone In The Last Three Months ***(Base: All Respondents: 500)***





Location Of Payphones Used

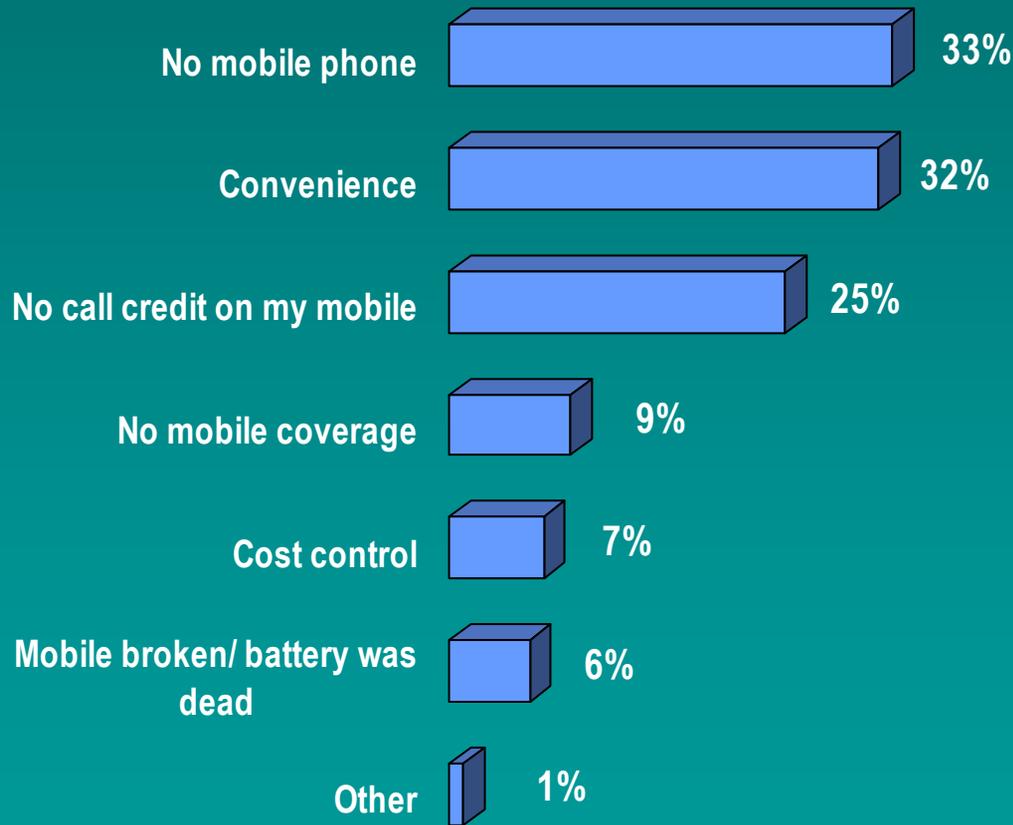
(Base: All using a payphone in the past 3 months: 135)





Reasons For Choosing To Use A Payphone Instead Of A Home Or Mobile Phone On These Occasions

(Base: All using a payphone in the past 3 months: 135)



With Mobile (97)

31%

22%

33%

11%

9%

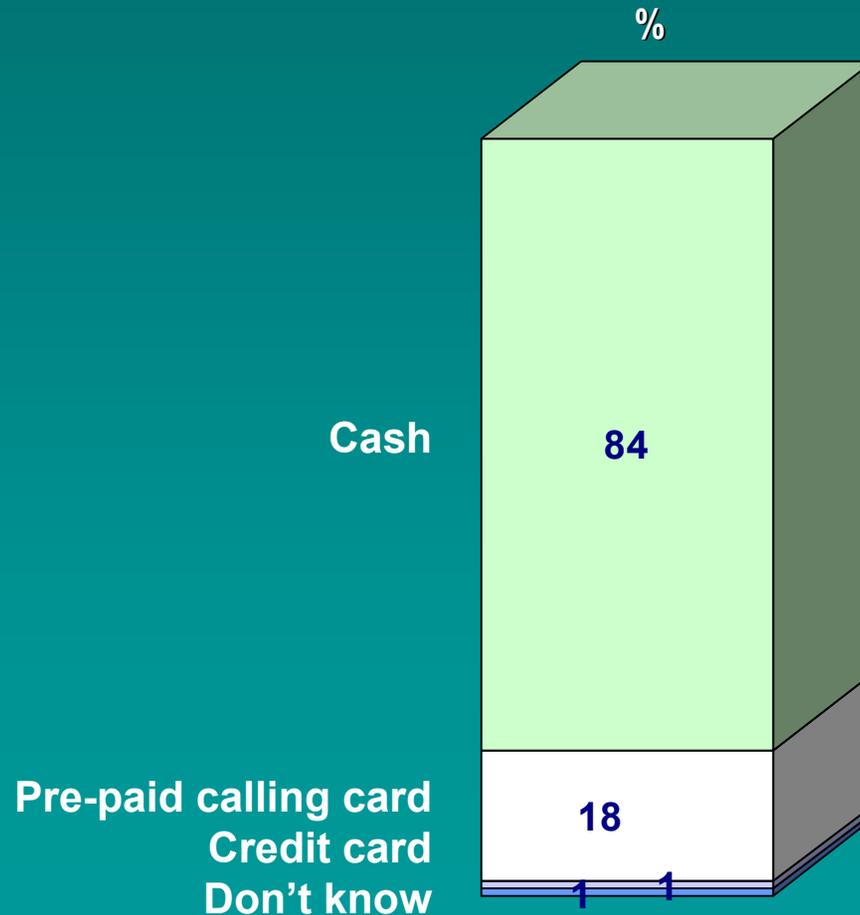
8%

-



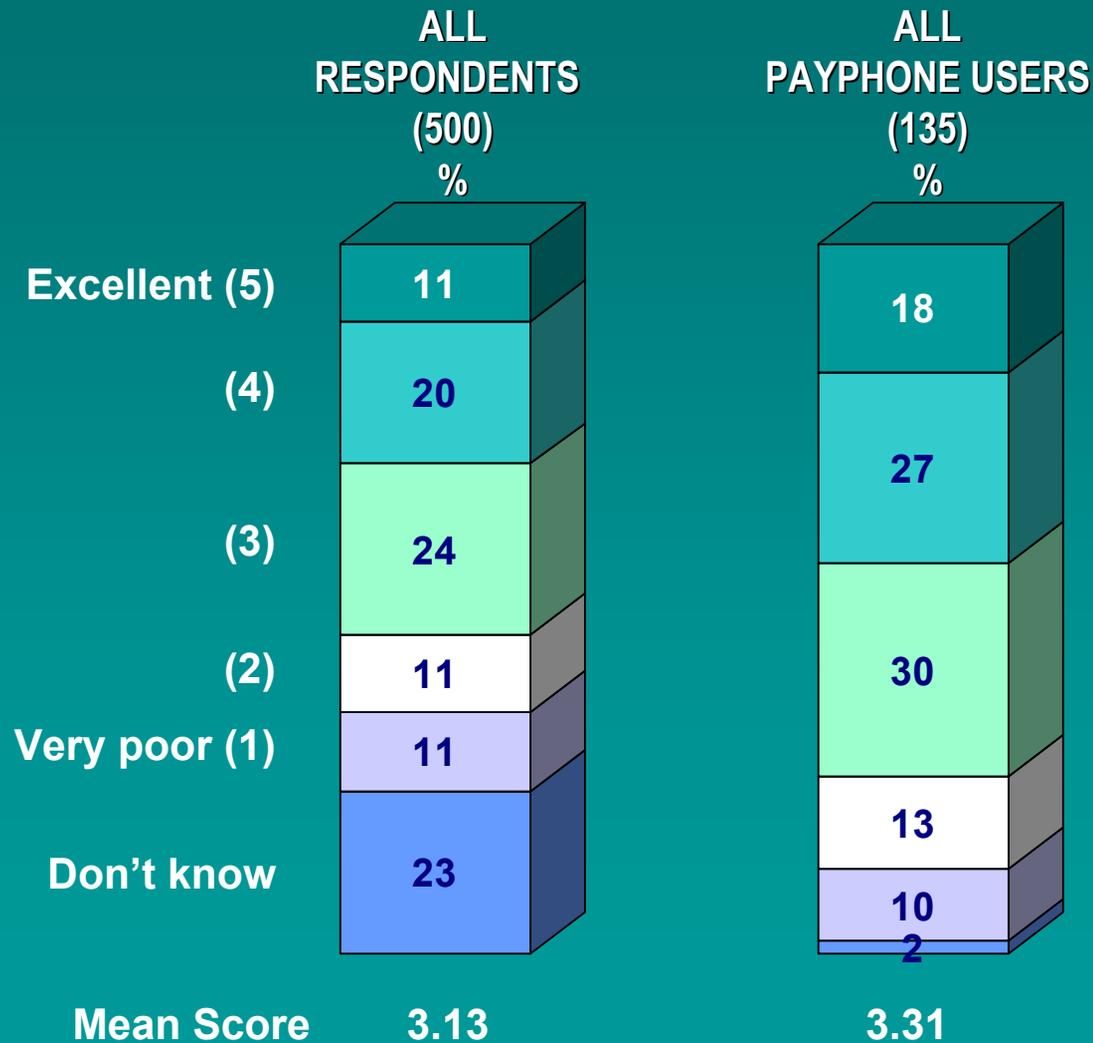
Method Of Payment Used For Payphones

(Base: All using a payphone in the past 3 months: 135)





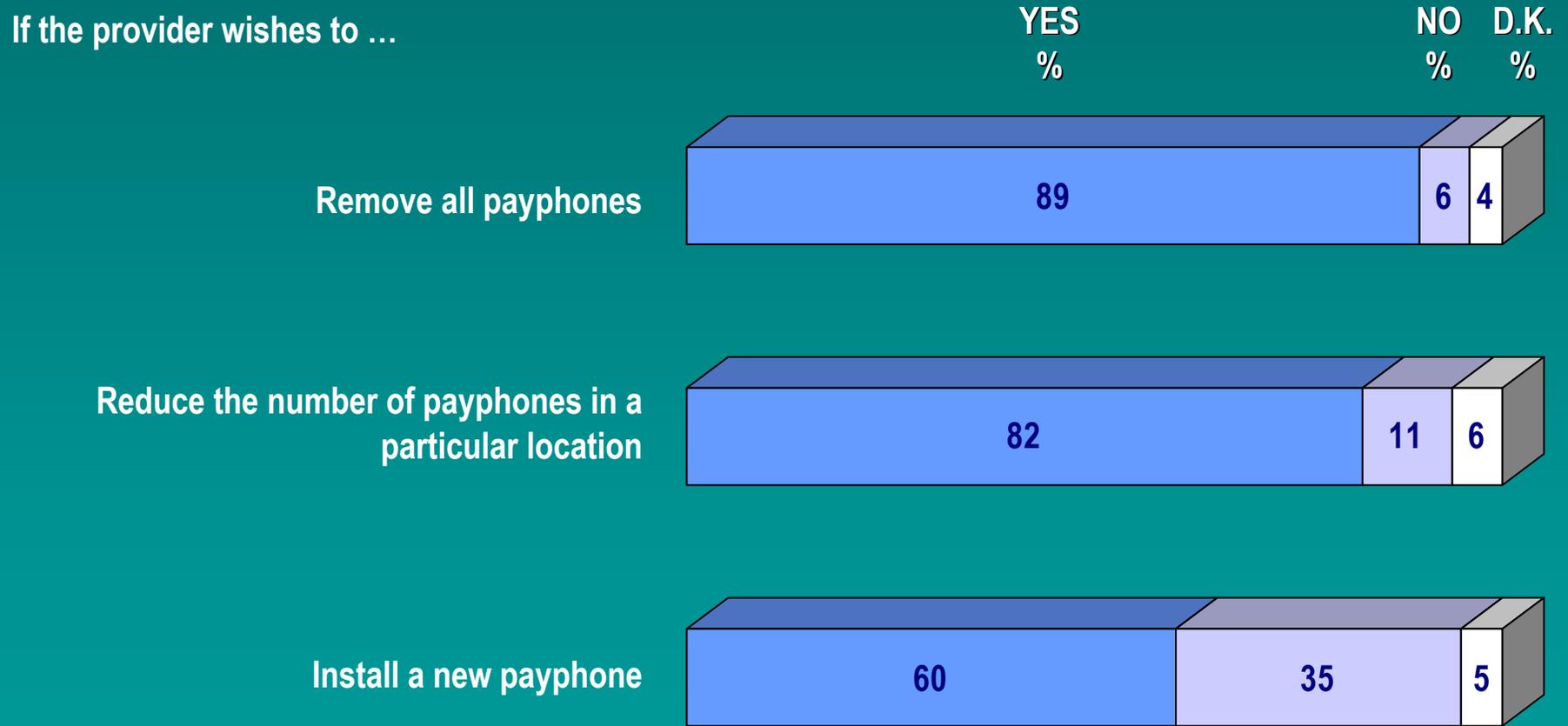
Rating Of The Payphone Service In Ireland





Whether A Payphone Provider Should Consult The Local Community

(Base: All Respondents: 500)



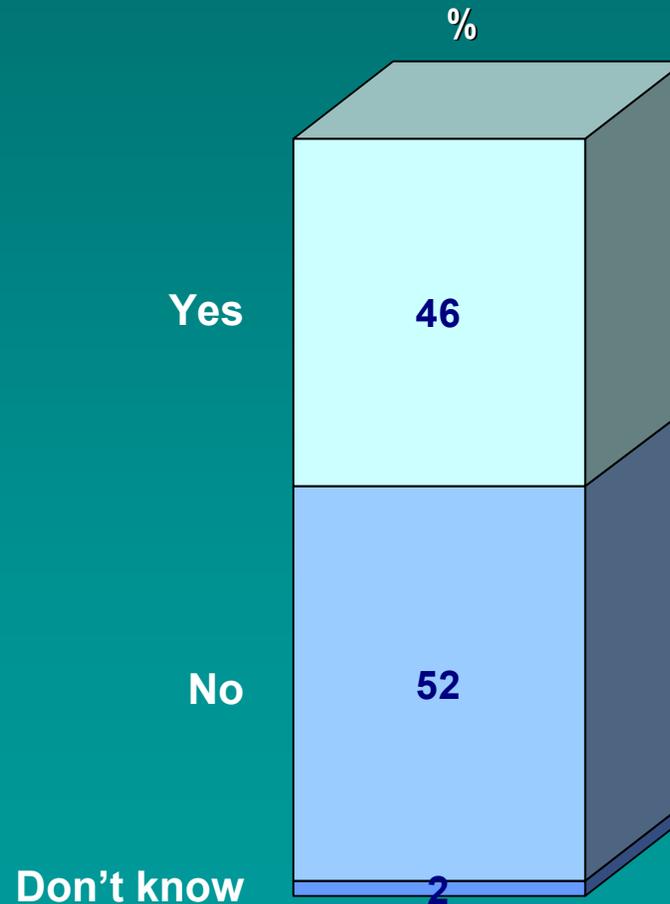


Directory Enquiry Services



Awareness Of More Than One Directory Enquiry Service Provider In The Market

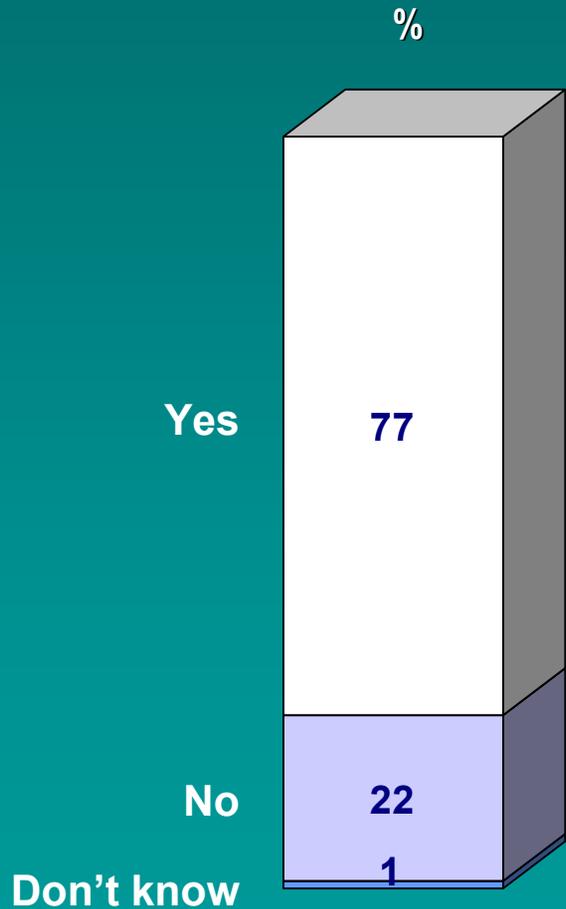
(Base: All Respondents: 500)





Whether Ever Make Use Of Directory Enquiry Service

(Base: All Respondents: 500)

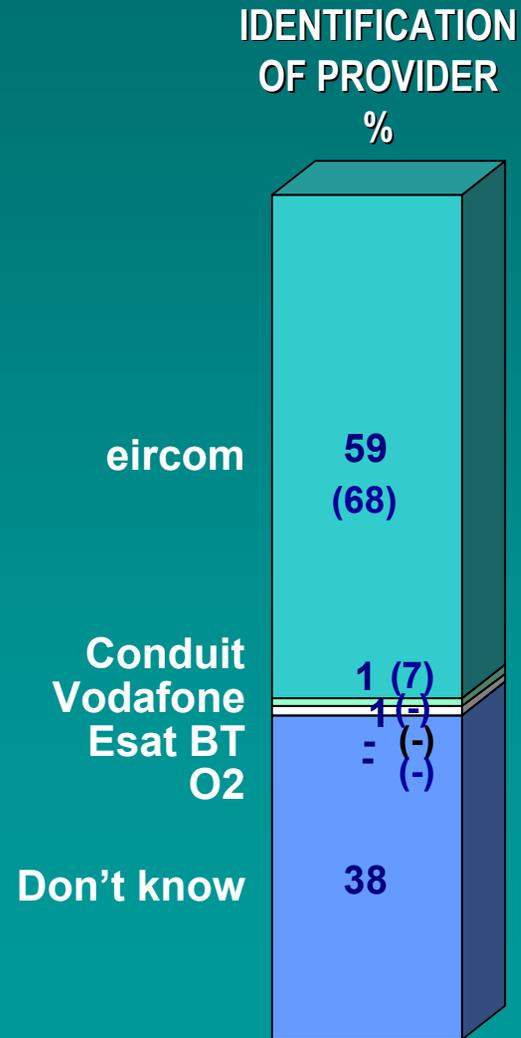
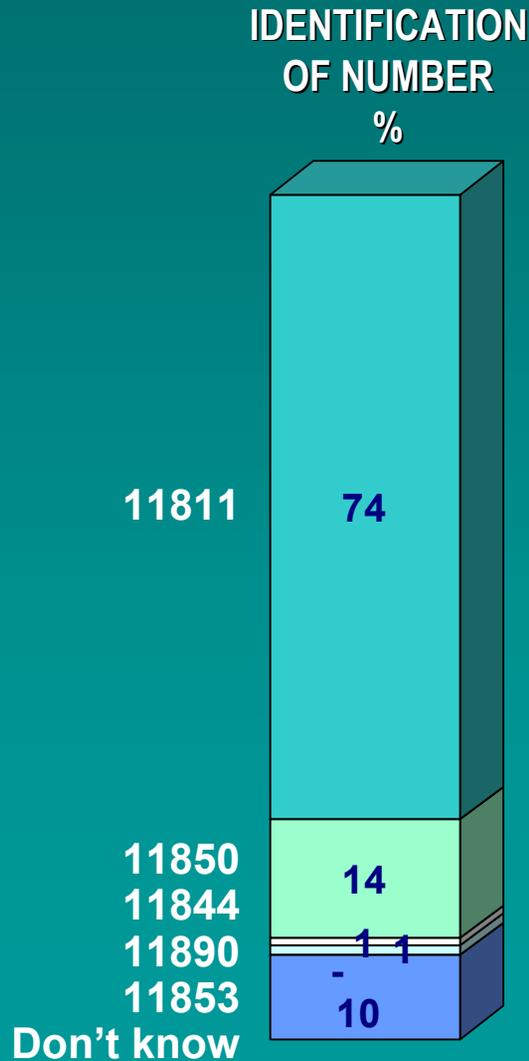


Frequency of Using Service (Base: 390)	
	%
Daily	1
A few times a week	10
Once a week	10
Once every 2 weeks	10
Once every 3 – 4 weeks	26
Less often	42



Directory Enquiry Service Used

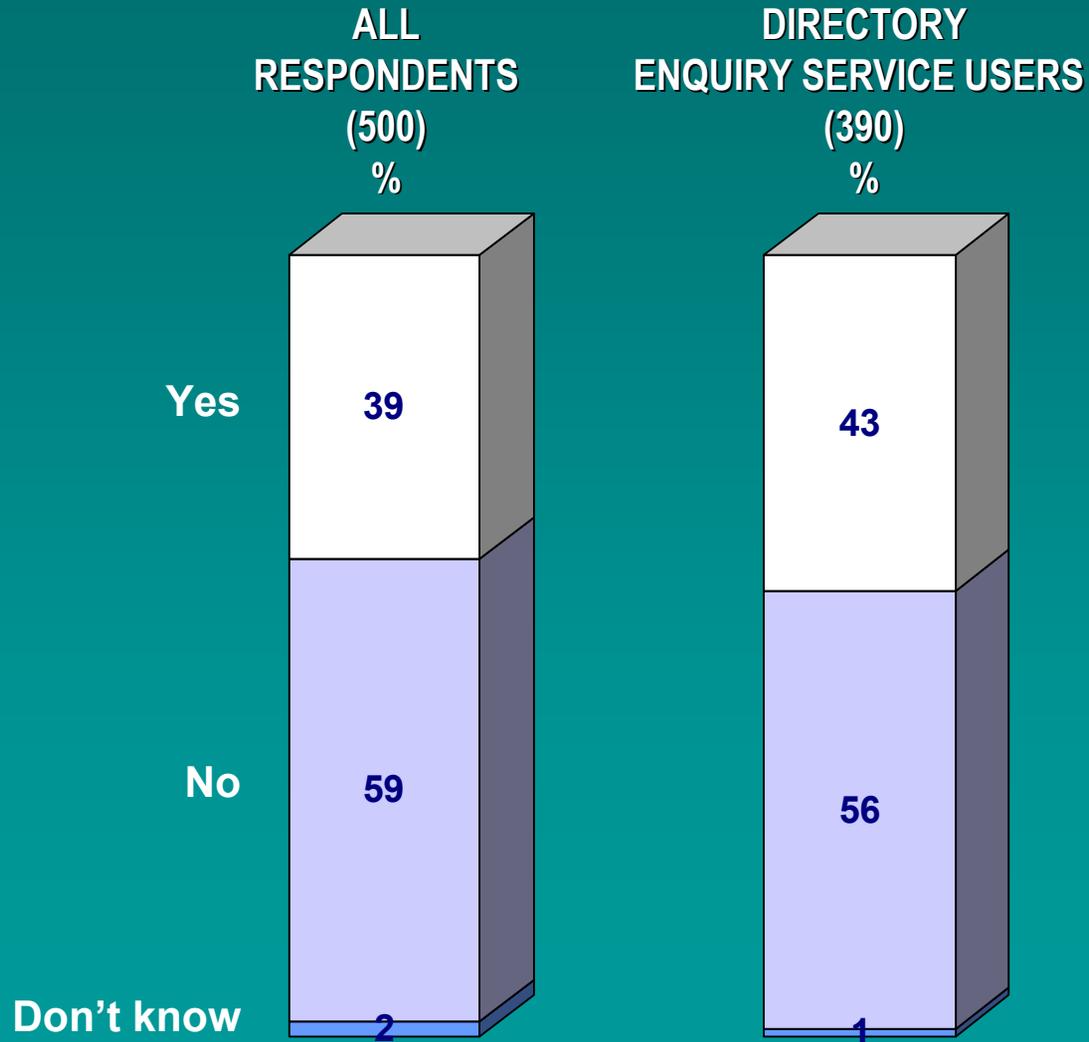
(Base: All who have used a directory enquiry service: 390)



() = % of those identifying provider number used



Whether Aware Of Cost Of A Directory Enquiry Call From Chosen Service Provider

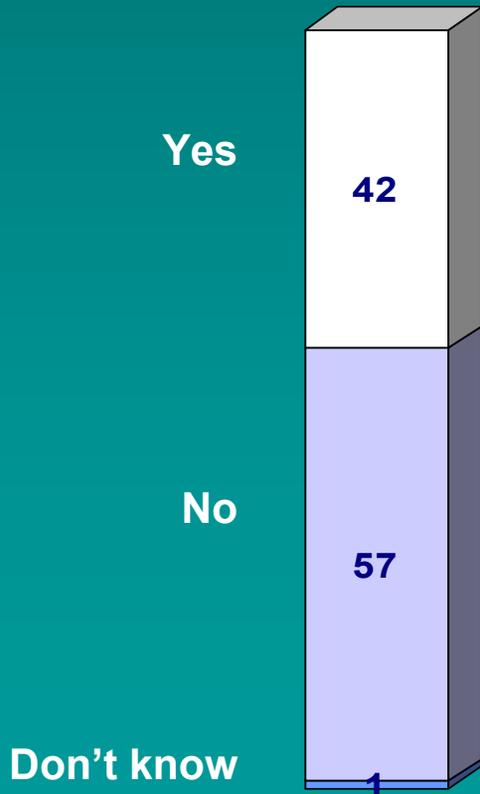




Awareness Of Call Completion Service – Where Operator Connects You To The Number You Are Looking For

(Base: All who have used a directory enquiry service: 390)

WHETHER USED
THE SERVICE
%



WHETHER AWARE OF INCREASED
COST OF USING SERVICE
%

