General Condition 18 Research Mobile number portability in Great Britain and the Republic of Ireland

March 2009

Introduction

- The review of General Condition 18 seeks to understand consumer experience of and attitudes towards mobile number portability in the UK.

- We have conducted qualitative and quantitative research in the Great Britain (GB).

- In the Republic of Ireland the process of mobile number portability is different to the UK. It is recipient network led (so there is no need for the consumer to acquire a PAC code) and is a quicker process (around 2 hours).

- We therefore commissioned additional research with consumers in the Republic of Ireland so that we could compare experience and attitudes within these different porting processes.

Methodology

GB

- Face to Face omnibus survey
- CAPI (Computer Assisted Personal Interviews)

- Sample size: 2000

- Research agency: TNS

- Fieldwork dates: Nov/ Dec 2008

Republic of Ireland

- Telephone omnibus survey
- CATI (Computer Assisted Telephone Interviews)

- Sample size: 1020

- Research agency: TNS
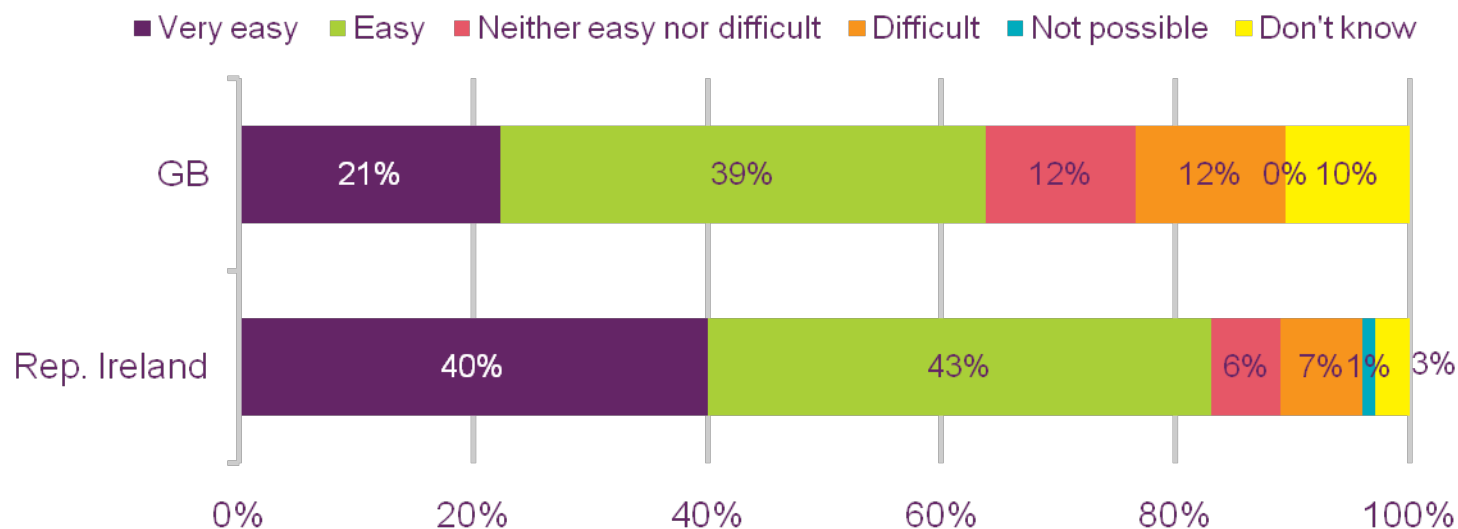
- Fieldwork dates: February 2009

- The GB survey was conducted face to face and the Republic of Ireland survey was conducted by (fixed line) telephone. The results are comparable, though it should be noted that consumers in the Republic of Ireland who have a mobile phone, but no fixed line phone would have been excluded from the sample.

Summary

- Compared to GB customers, mobile customers in RoI think it is easier to switch and port

- There is a higher awareness of the right to port in RoI than in the GB and the ability to port considered more important by RoI customers than GB customers

- In the last 2 years, switching levels in the GB have been higher than in RoI…

- …but among switchers, number porting is far more common in RoI

- Barriers to switching and porting are similar in the GB and RoI

- Mobile customers who ported in RoI are slightly more satisfied with the overall process and speed of the process in the GB

- RoI mobile customers are less likely to have a preference on the mechanics of the porting process

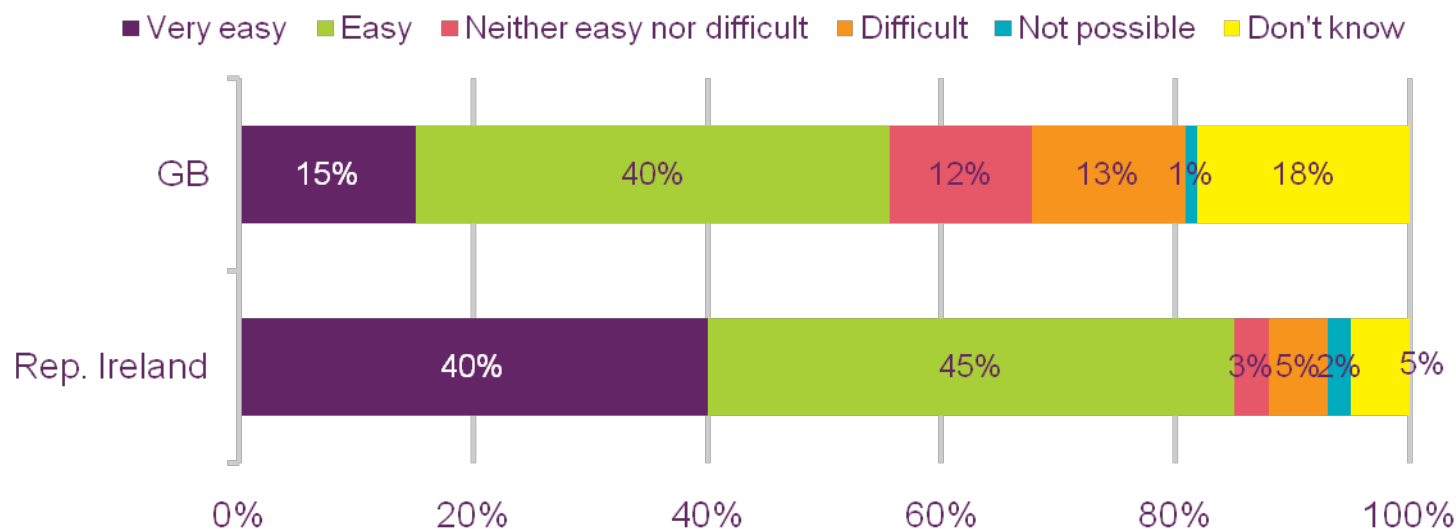# RoI mobile customers think it easier to switch network than GB customers do

How easy or difficult do you think it is to change to another mobile phone network?

Legend: ■ Very easy ■ Easy ■ Neither easy nor difficult ■ Difficult ■ Not possible ■ Don't know

GB: 21% Very easy, 39% Easy, 12% Neither easy nor difficult, 12% Difficult, 0% Not possible, 10% Don't know

Rep. Ireland: 40% Very easy, 43% Easy, 6% Neither easy nor difficult, 7% Difficult, 1% Not possible, 3% Don't know

Source: TNS GB Face to Face omnibus, TNS Rep. Ireland telephone omnibus
Base: All who own a mobile phone (RoI n = 943, GB n = 1586)

# RoI mobile customers think it easier to port number when switching network than GB customers do

How easy or difficult do you think it is to keep your existing phone number when you change to another mobile phone network?

Legend: ■ Very easy ■ Easy ■ Neither easy nor difficult ■ Difficult ■ Not possible ■ Don't know

GB: 15% | 40% | 12% | 13% | 1% | 18%

Rep. Ireland: 40% | 45% | 3% | 5% | 2% | 5%

Source: TNS GB Face to Face omnibus, TNS Rep. Ireland telephone omnibus
Base: All who own a mobile phone (RoI n = 943, GB n = 1586)

RoI mobile customers are more aware of the right to port

If you change your mobile network, it is your right to keep the same mobile number. Before now, were you aware of this?
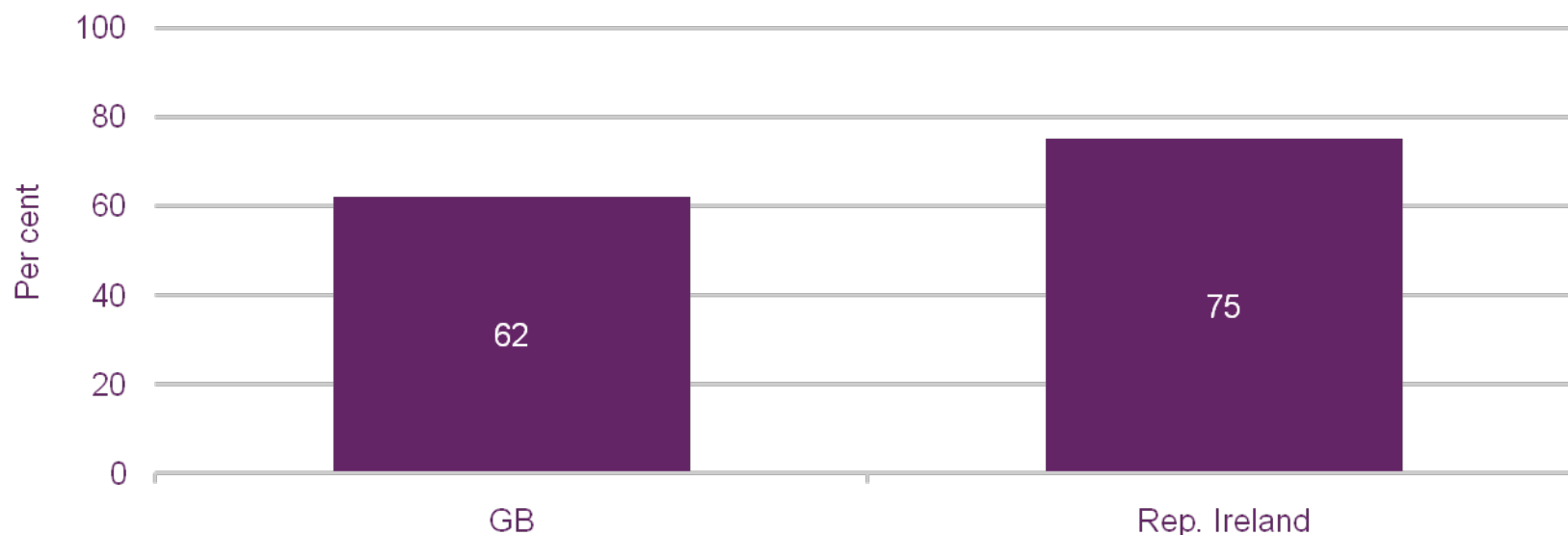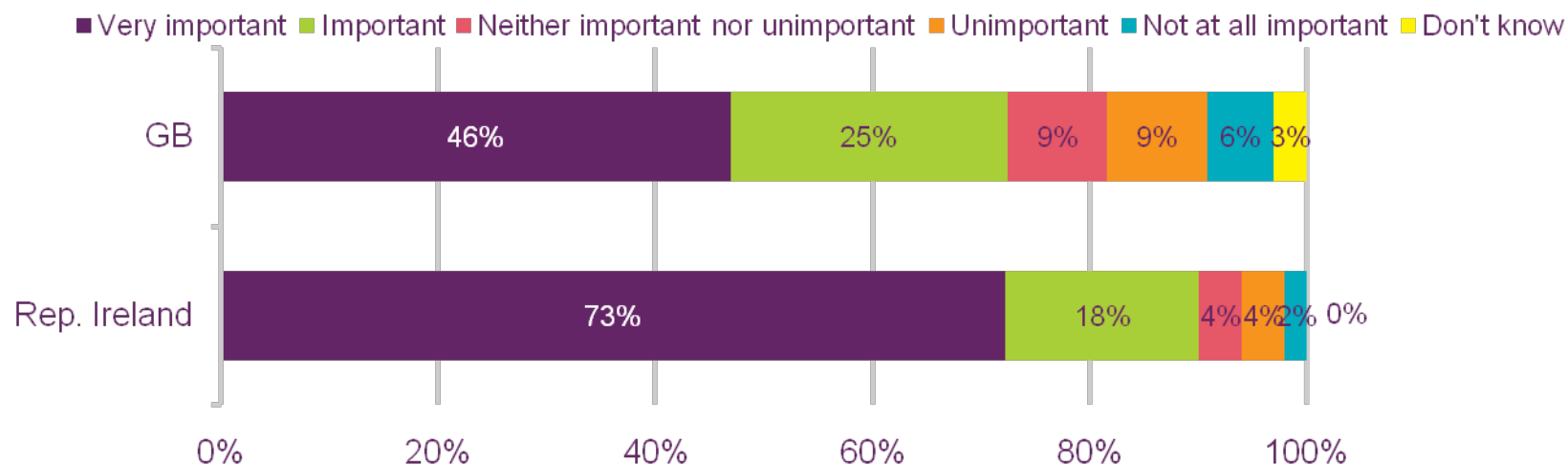

Source: TNS GB Face to Face omnibus, TNS Rep. Ireland telephone omnibus
Base: All who own a mobile phone (RoI n = 943, GB n = 1586)

Number porting is more important to RoI customers

How important is it when changing mobile phone network that you keep your existing mobile phone number?
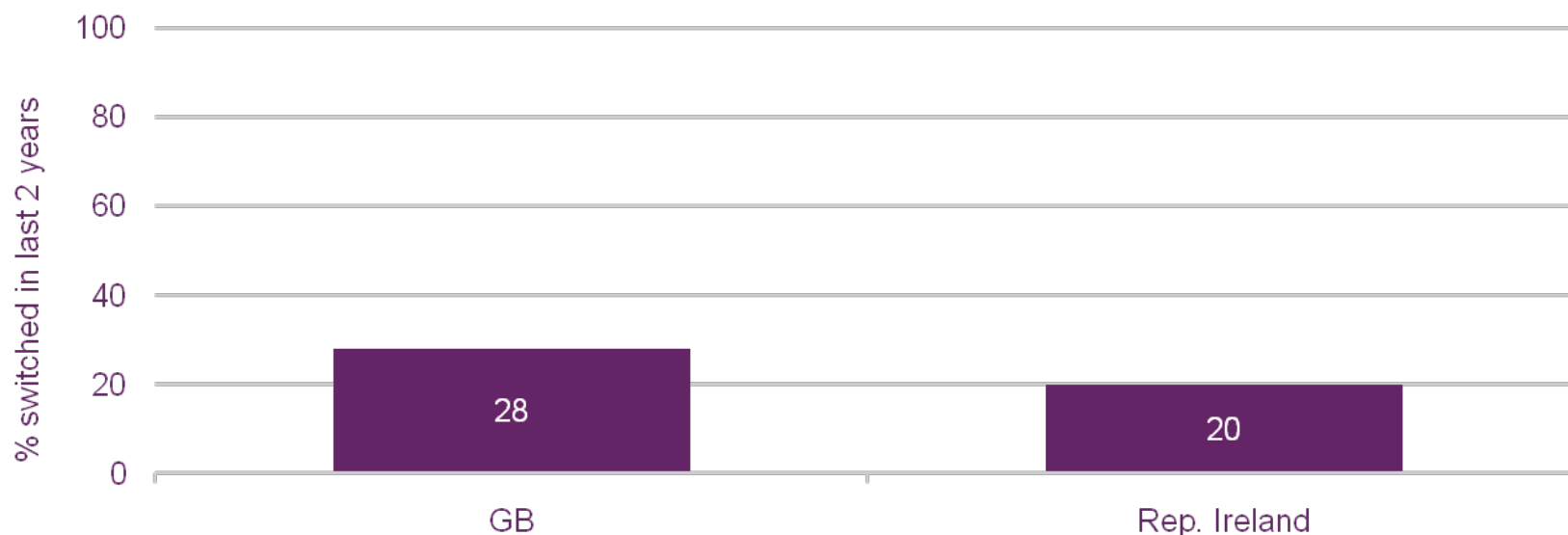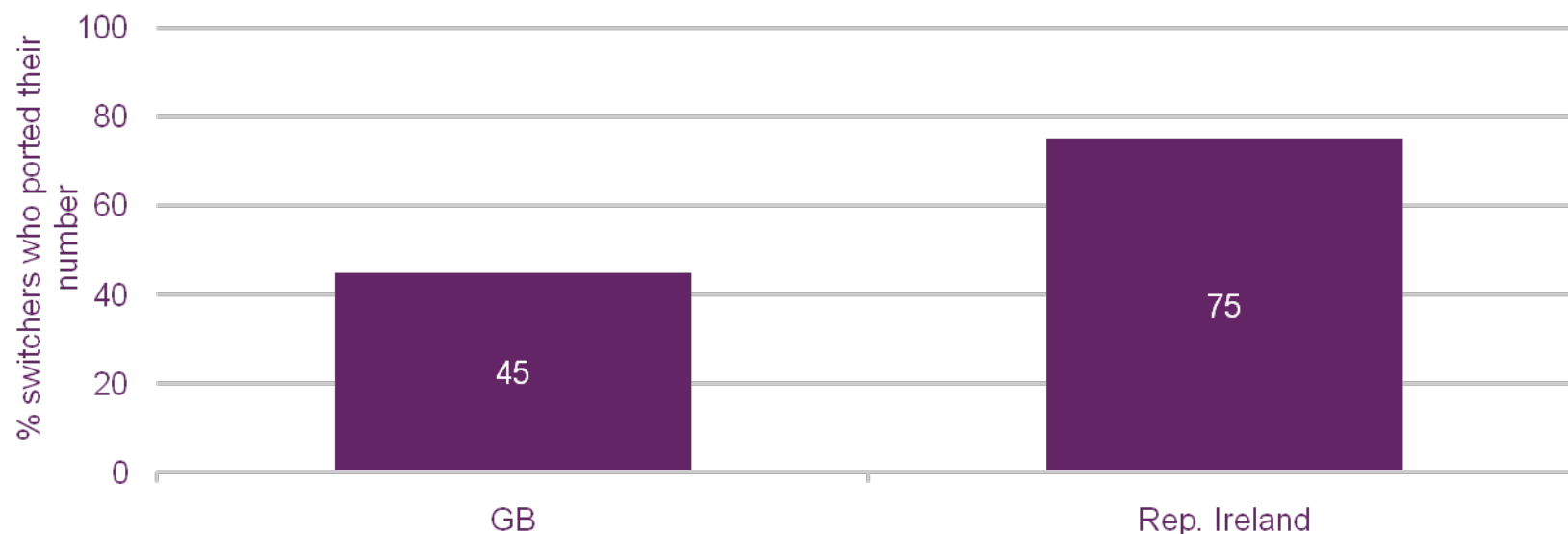
Switching levels are lower in RoI…

Have you ever changed your mobile phone network? If Yes, when was the last time you did this?

Source: TNS GB Face to Face omnibus, TNS Rep. Ireland telephone omnibus
Base: All who own a mobile phone (RoI n = 943, GB n = 1586)

But RoI switchers were much more likely to port

When you last changed your mobile phone network, did you change your phone number or did you keep your existing number?

Barriers to switching are similar in GB and RoI

Do you agree or disagree with the following statements?

	GB % agree	RoI % agree
It is so <u>difficult</u> to change to another mobile phone network that it puts me off from doing so	16%	19%
It <u>takes so long</u> to change to another mobile phone network that it puts me off doing so	17%	16%
I am satisfied with my existing mobile phone network so I have no reason to think about changing	87%	92%
If I wanted to change to another mobile phone network nothing would stop me	72%	86%

Barriers to porting are similar in GB and RoI

Why did you change your phone number?
(Top reasons shown, after prompting)

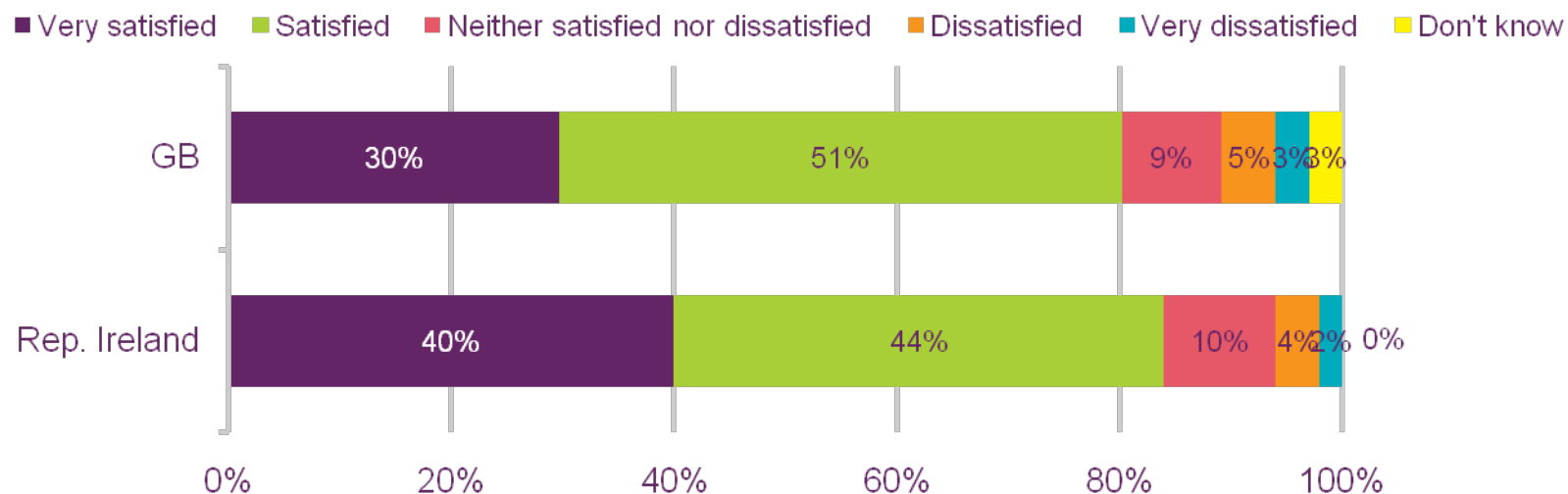|	GB after prompt %	RoI after prompt %
Did not know I could keep existing number	33	35
Wasn't told I could keep existing no./wasn't given the option	26	42
New network said I had to have new number	15	18
It was too much admin/hassle to keep existing number	16	34
It was too much hassle to get a PAC code from my old network	11	22
It would have taken too long to arrange to keep existing number	9	24

Source: TNS GB Face to Face omnibus, TNS Rep. Ireland telephone omnibus
Base: All who own a mobile phone and who have ever changed supplier, but didn't port number (RoI n = 94, GB n = 420)

Customers who ported in RoI are slightly more satisfied with the overall process

How satisfied are you with the process [of transferring existing number] overall?

Legend: ■ Very satisfied ■ Satisfied ■ Neither satisfied nor dissatisfied ■ Dissatisfied ■ Very dissatisfied ■ Don't know

GB: 30% Very satisfied, 51% Satisfied, 9% Neither, 5% Dissatisfied, 3% Very dissatisfied, 3% Don't know

Rep. Ireland: 40% Very satisfied, 44% Satisfied, 10% Neither, 4% Dissatisfied, 2% Very dissatisfied, 0% Don't know

Source: TNS GB Face to Face omnibus, TNS Rep. Ireland telephone omnibus
Base: All who have switched and ported (RoI n = 284, GB n = 346)

Customers who ported in RoI are more satisfied with the speed of the porting process

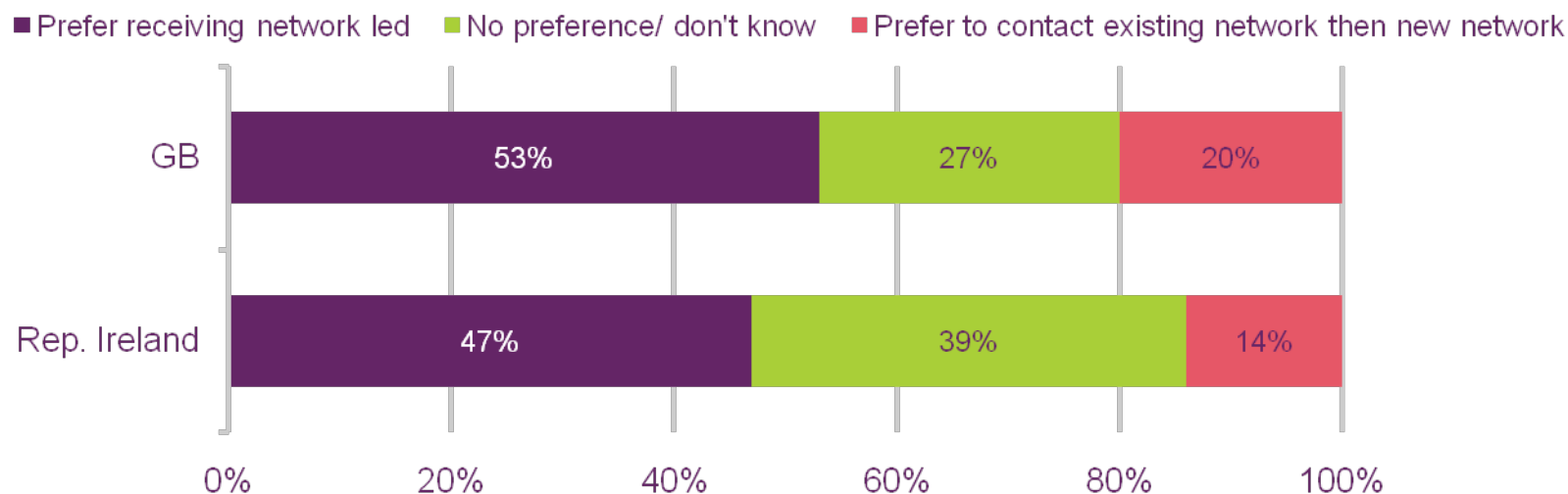How satisfied are you with the time taken to transfer number to your new network?
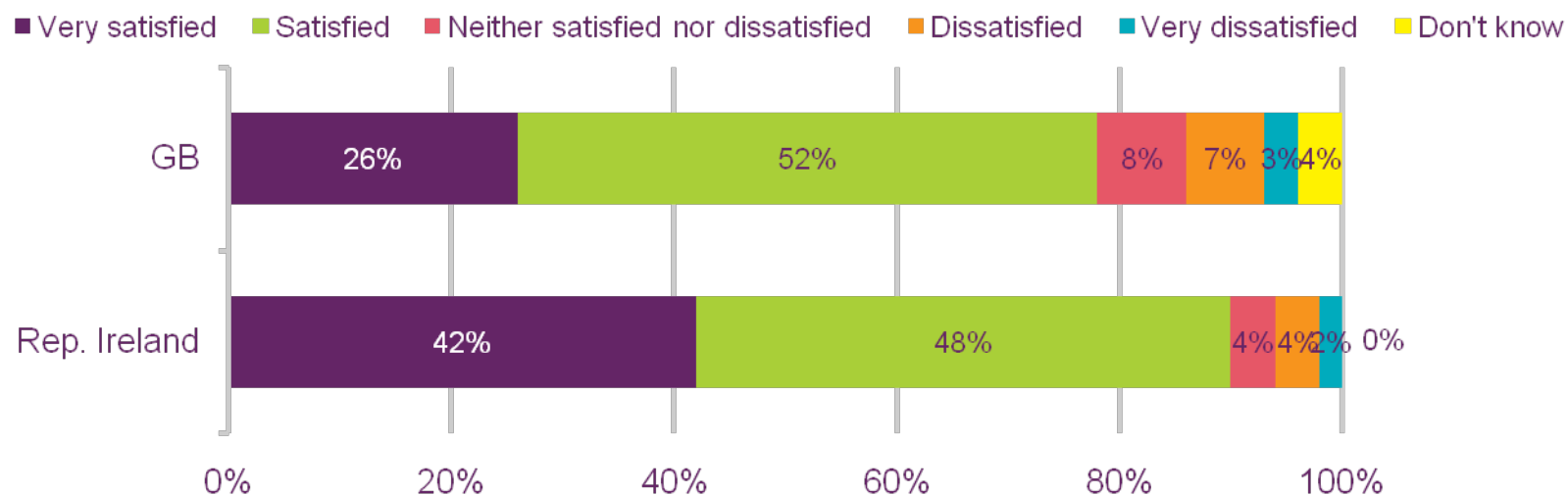
Legend: ■ Very satisfied ■ Satisfied ■ Neither satisfied nor dissatisfied ■ Dissatisfied ■ Very dissatisfied ■ Don't know

GB: 26% | 52% | 8% | 7% | 3% | 4%

Rep. Ireland: 42% | 48% | 4% | 4% | 2% | 0%

Source: TNS GB Face to Face omnibus, TNS Rep. Ireland telephone omnibus
Base: All who have switched and ported (RoI n = 284, GB n = 346)

RoI mobile customers are less likely to have a preference on the mechanics of the porting process

When changing from one mobile phone network to another – if you wanted to keep your existing phone number which of these processes would you most prefer?

Legend:
- Prefer receiving network led
- No preference/ don't know
- Prefer to contact existing network then new network

	Prefer receiving network led	No preference/ don't know	Prefer to contact existing network then new network
GB	53%	27%	20%
Rep. Ireland	47%	39%	14%

Source: TNS GB Face to Face omnibus, TNS Rep. Ireland telephone omnibus
Base: All who own a mobile phone (RoI n = 943,GB n = 1586)