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# Electronic Communications Consumer Survey - February 2006

## Key Findings

### Fixed Telephone Service (FTS)

**1.** According to the February 2006 electronic communications consumer survey, around 60% of Portuguese homes have a **fixed-line telephone**.

It should be noted that 5.7% of those who didn't subscribe to FTS expressed their intention to do so within one year.

**Table 1 - Possession of electronic communication equipment**

| | |
|---|---|
| Possession of fixed telephone line | 60.0% |

Source: Electronic communications consumer survey Feb 2006

**2.** Those **without a fixed-line telephone** gave the following reasons: 'use of mobile phone' 61.2% and 'prefer not to pay line rental charge' 16.5%.

**Table 2 - Reasons for not having a fixed-line telephone**

| | |
|---|---|
| Other | 7.3% |
| Too expensive | 4.2% |
| Don't need or don't need to communicate | 4.5% |
| It's cheaper to make calls by other means | 5.0% |
| Prefer not to pay monthly charge | 16.5% |
| Use mobile phone | 61.2% |

Source: Electronic communications consumer survey Feb 2006

The **main advantage of the mobile phone service over fixed-line services** is **mobility** according to 76.4% of respondents, and **lack of monthly charge** according to 11.9%.

**Table 3 - Advantage of mobile over fixed phone**

| | |
|---|---|
| Mobility | 76.4% |
| No monthly charge | 11.9% |
| Prices | 7.2% |
| Quality of communication | 1.5% |
| Level of customer support | 0.3% |
| No advantage | 0.1% |
| Other | 2.3% |
| Don't know / Didn't respond | 0.4% |

Source: Electronic communications consumer survey Feb 2006

**3.** Almost 1 in 5 of those who used a fixed-line phone said that they used more than one operator. Of these 31% used **call-by-call selection**, while 49.2% used **pre-selection** (There was a large of proportion of 'Don't know / Didn't respond'.)

**Table 4 - Selection of operator and call-by-call**

| | | |
|---|---|---|
| Use more than one fixed-line operator:: | 19.1% | |
| | Call-by-call selection | Pre-selection of operator |
| Currently use | 31.0% | 49.2% |
| Used in past but stopped | 23.2% | 12.1% |
| Aware of selection but never used | 15.8% | 12.0% |
| Unaware | 7.8% | 8.2% |
| Don't know / Didn't respond | 22.2% | 18.5% |

Source: Electronic communications consumer survey Feb 2006

Around 83% of those questioned were **clients of PT**. The operator with the second largest number of clients was **Tele 2** (14.8%), followed by **Cabovisão** (11.5%).

**Table 5 - Operator share of fixed-line service**

| | Client's network operator | Operator client uses to make calls |
|---|---|---|
| PT | 83.4% | 68.7% |
| Tele2 | 14.8% | 14.8% |
| Cabovisão | 11.5% | 11.5% |
| Optimus Home | 2.6% | 2.6% |
| Novis | 2.4% | 2.4% |
| Clix | 2.0% | 2.0% |
| ONI | 1.9% | 1.9% |
| Other | 0.5% | 0.4% |
| Don't know / Didn't respond | 0.1% | 0.1% |
| Total | 119.1% | 104.4% |

Source: Electronic communications consumer survey Feb 2006

As far as the regulatory mechanisms in place for making it easier to switch operators are concerned, 62.4% of those surveyed said they were aware of **fixed-line number portability**.

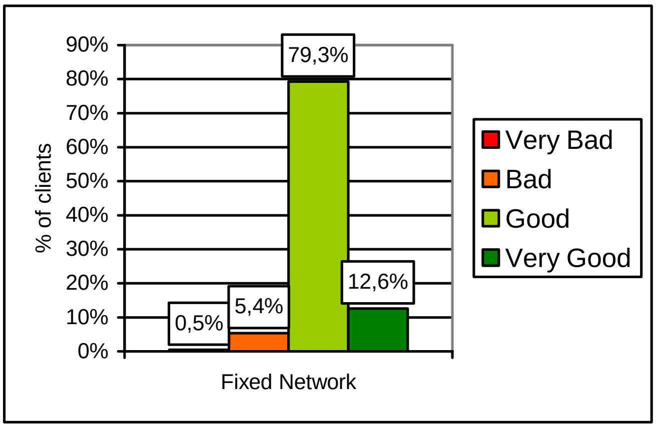
**Table 6 - Number Portability**

| | |
|---|---|
| Aware of fixed-line number portability | 62,4% |

Source: Electronic communications consumer survey Feb 2006

**4.** The majority of users said they considered the quality of the service to be good.

**Graph 1 - Consumer perception of quality**




Source: Electronic communications consumer survey Feb 2006

## Mobile Telephone Service (MTS)

**5.** In February 2006, 84.5% of those surveyed had a **mobile phone**.

**Table 7 - Possession of electronic communication equipment**

| | |
|---|---|
| Possession of mobile phone | 84.5% |

Source: Electronic communications consumer survey Feb 2006

Of those who were mobile phone clients, 86% had **one active card**, 11.6% had two, while 2.4% had more than two cards.

**Free contracts** and **pre-payment** were the preferred option by 45.3% and 42.8% of clients, respectively.

**Table 8 - Mobile phone cards**

| | |
|---|---|
| Number of cards | |
| 1 card | 86.0% |
| 2 cards | 11.6% |
| More than 2 cards | 2.4% |
| Type of contract | |
| Free | 45.3% |
| Pre-paid | 42.8% |
| Subscription | 9.1% |

Source: Electronic communications consumer survey Feb 2006

More than 20% of mobile phone clients acquired their phone **less than six months** ago. Around 17% acquired it more than six months ago but less than one year ago.

When they acquired their new phone 85% came with a card; however just under half of users (49.2%) continued to use only their existing card.

**Table 9 - Time of handset possession and type of contract**

| | |
|---|---|
| Less than 6 months | 20.3% |
| 6 - 12 months | 17.0% |
| 1 - 2 year | 22.2% |
| More than 2 years | 40.4% |
| The new mobile phone came with a card | 85.3% |
| Continued using existing card | 49.2% |
| Used new card | 47.1% |
| Used both | 3.2% |

Source: Electronic communications consumer survey Feb 2006

**6.** Of the MTS clients surveyed, 16% said they had a **3G phone**

Of these, 63.4% used it send MMSs, 26.6% used it to make video calls and 8.8% to access the internet through their PC.

**Table 10 - Possession of 3G phone and services used**
**Possess 3G mobile phone**

| | |
|---|---|
| Possess 3G mobile phone | 16.0% |
| Services Used: | |
| MMS | 63.9% |
| *Download* ring tones and images | 35.3% |
| Video calls | 26.6% |
| E-mail. Messenger or chat | 14.1% |
| Download games and online games | 11.7% |
| MMS Albums | 11.5% |
| Video services | 9.7% |
| Internet access through PC | 8.8% |
| Other type of internet access through mobile phone | 6.0% |
| None of the above | 22.7% |
| Don't know / Didn't respond | 0.5% |

Source: Electronic communications consumer survey Feb 2005

**7.** Of mobile service clients, 19.3% have already changed operator at least once. The two main reasons for switching were: **most of the client's contacts were clients of the new operator** (34.6%) and **dissatisfaction with prices** (33.3%)

More than 66% of clients who have never changed their operator say they are **satisfied with their existing service.** 31.2% say that **most of their contacts** also use their operator.

As to the operators' share of clients, 51% of those surveyed said they were clients of **TMN**.

**Table 11 - Switching mobile phone operator**

| | |
|---|---|
| **Have already changed operator** | **19.3%** |
| Most of my contacts are clients of new operator | 34.6% |
| Unhappy with prices | 33.3% |
| Unhappy with quality of service | 13.7% |
| Offer from new operator | 8.6% |
| Other | 20.6% |
| **Never changed operator** | **80.7%** |
| Satisfied with current operator | 66.2% |
| Most of my contacts are clients of current operator | 31.2% |
| Offers the best prices | 6.6% |
| Switching is too complicated / inertia | 3.2% |
| Decision of another person | 2.8% |
| More / better network coverage | 0.8% |
| Keep the same number | 0.4% |
| Other | 4.0% |
| Don't know / Didn't respond | 2.3% |

Source: Electronic communications consumer survey Feb 2006

**Table 12 - Operator share of mobile phone service.**

| | Clients |
|---|---|
| TMN | 52.3% |
| Vodafone | 39.6% |
| Optimus | 19.4% |
| Don't know / Didn't respond | 0.3% |
| Total | 111.6% |

Source: Electronic communications consumer survey Feb 2006

**8.** 59.4% of MTS clients were aware of **number portability**

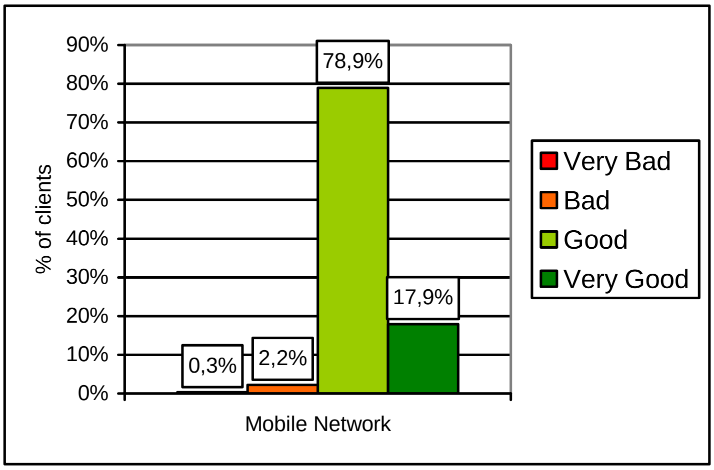
**Table 13 - Number portability**

| | |
|---|---|
| Aware of mobile portability | 59.4% |
| Have used mobile portability | 2.2% |

Source: Electronic communications consumer survey Feb 2006

**9.** The majority of users considered the quality of service as good.

**Graph 2 -** Consumer perception of quality




Source: Electronic communications consumer survey Feb 2006

## Methodology

The population targeted by this survey are individuals of either sex, aged 15 or over, resident in Continental Portugal and the Autonomous regions of Madeira and The Azores.

The size of the sample was set in order to obtain a 2.5% margin of error (assuming an accuracy rate of 95%). The sample was selected by sex, age and region, based on the latest population census: Census 2001. The survey was conducted by Marktest through 2,020 personal and direct interviews, carried out between 17 January 2006 and 22 February 2006.