

Fixed to mobile research - June 2003

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Key Information objectives

To determine.....

- Level of awareness consumers have of the mobile phone networks they call from their fixed line
- The extent to which consumers call a mobile phone when calling people with mobile phones from a fixed line
- The reasons that users may restrict calls to mobile phones
- Substitutes used for calling mobile phones
- The extent to which people join a network to be part of a closed user group

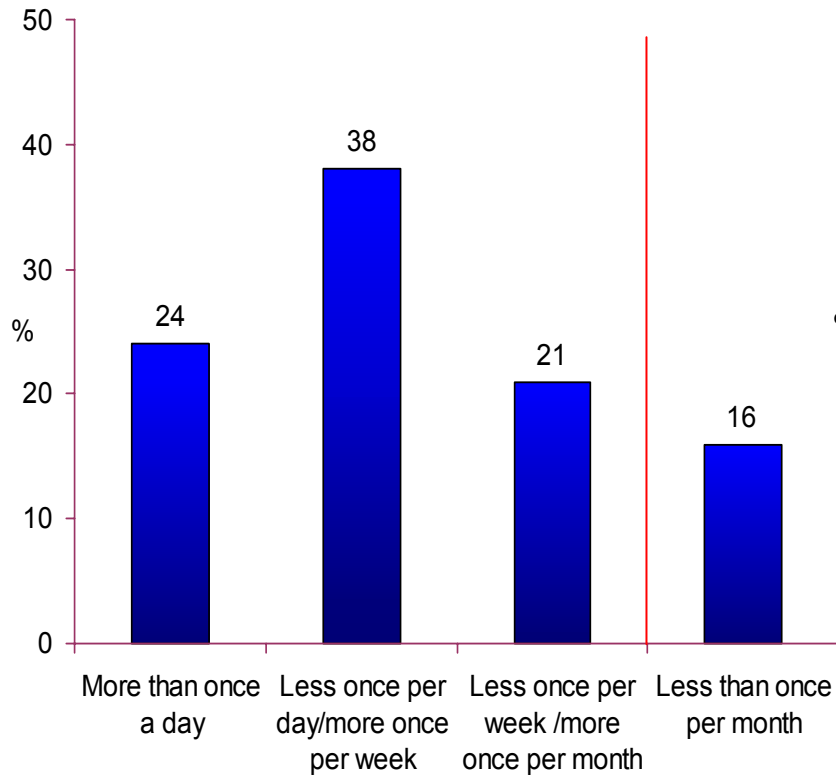
Method

- 500 Computer aided telephone interviews
- National randomised sample
- All respondents were decision makers or had major influence on decision of provider for fixed line services
- Two thirds of sample also main user and decision maker for mobile phone service provider
- 50% Men and 50% women
- Interviews conducted in first week of June 2003

Usage of fixed (home) to mobile calls

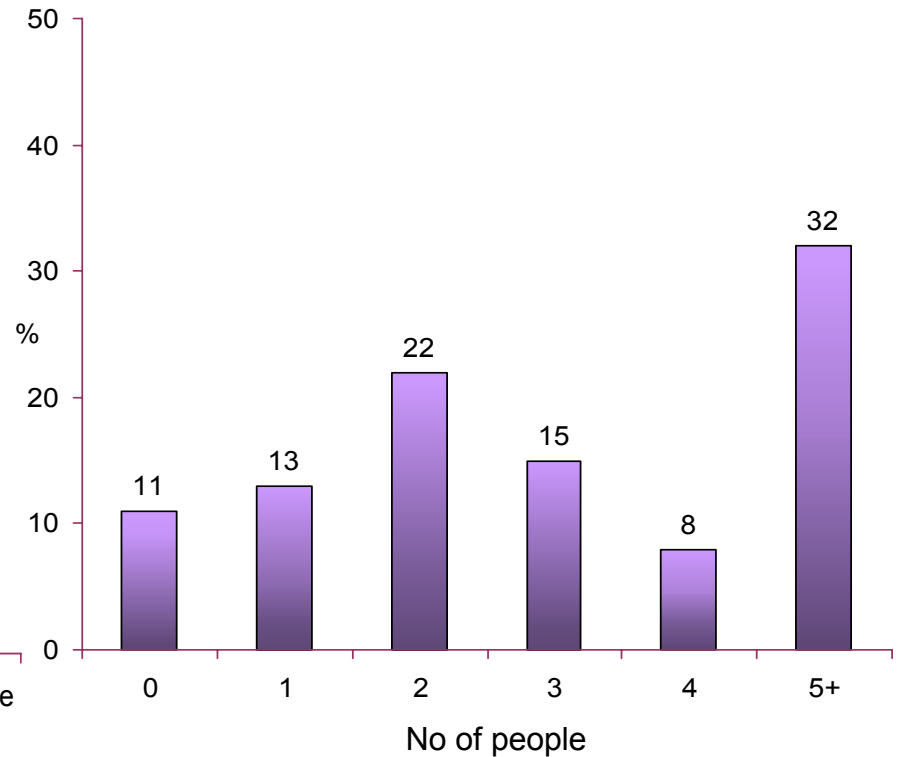
Usage of home phone to call mobiles

How often do you make calls from your home phone to a mobile phone?



Base: All Fixed Line Decision makers (n=500)

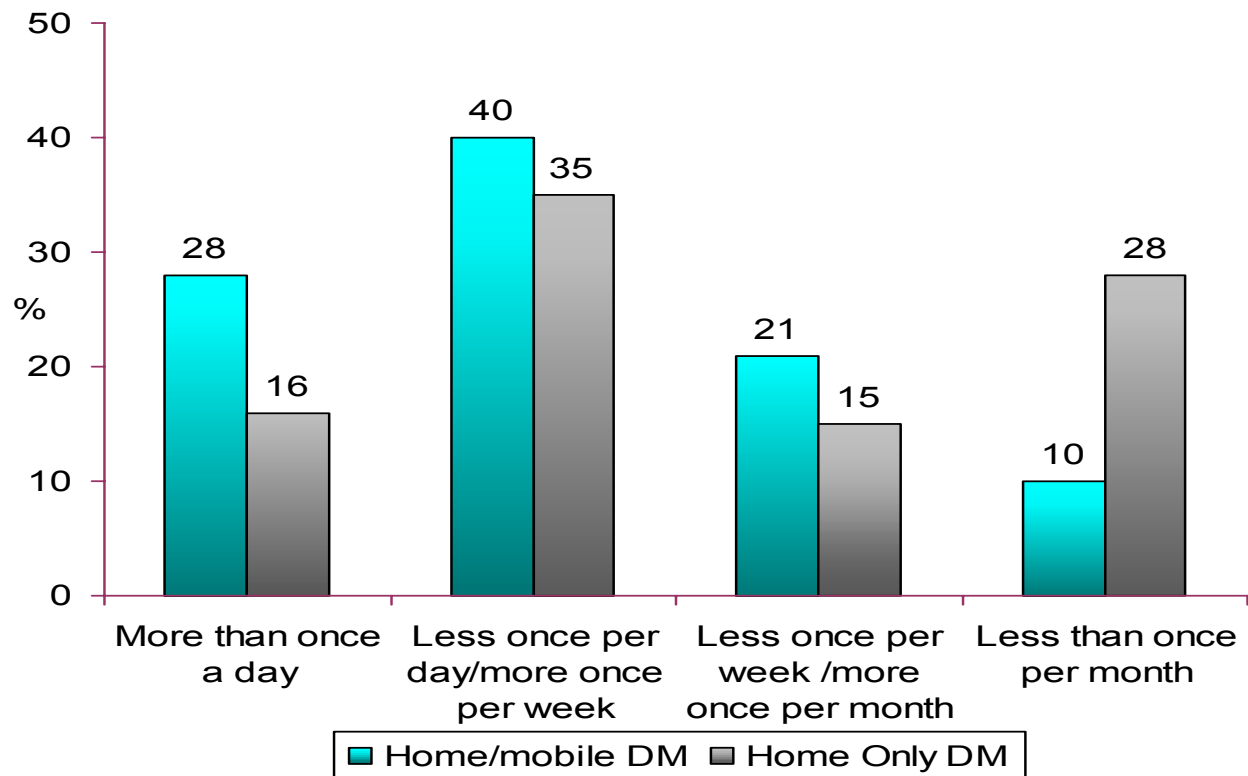
How many people do you call **more than once a month** on their mobile phone from your home phone?



Base: All who make calls to mobile from home phone at least once per month (n=411)

Usage of home phone to call mobiles

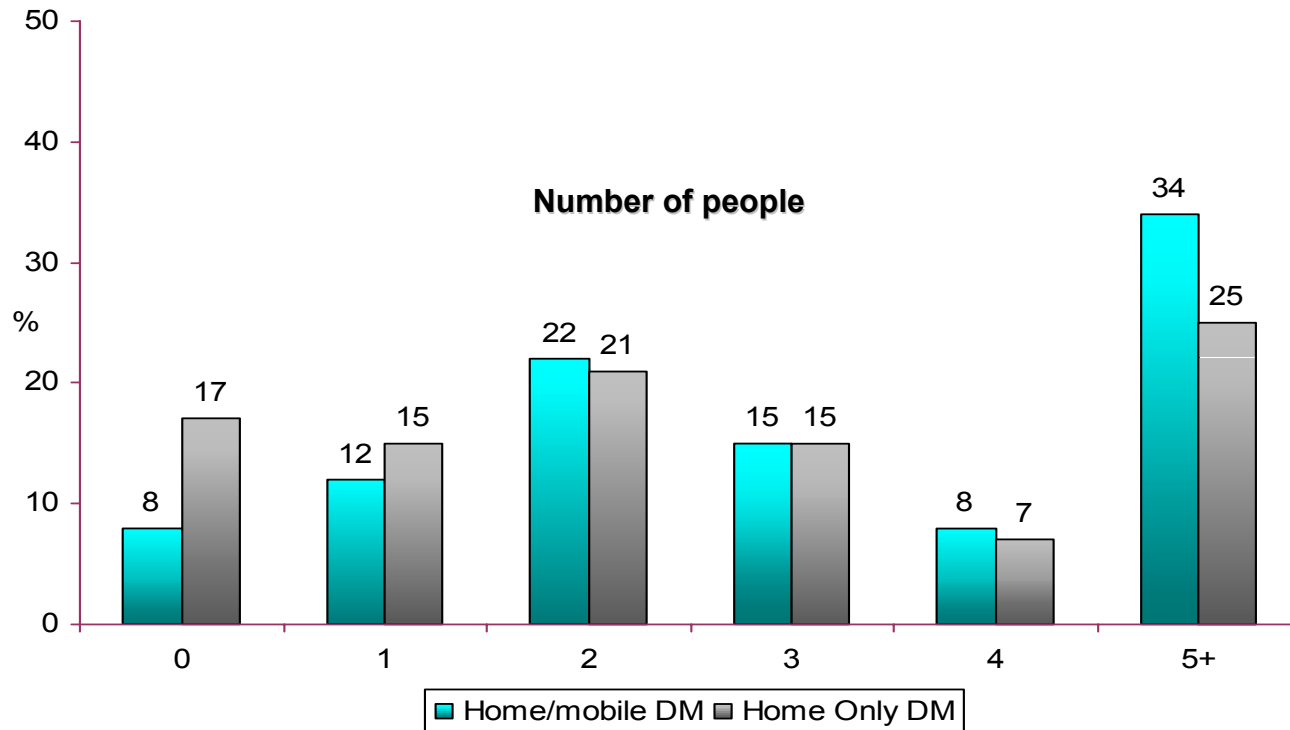
How often do you make calls from your *home* phone to a *mobile* phone?



Base: All Fixed Line Decision makers (n=500)

Usage of home phone to call mobiles

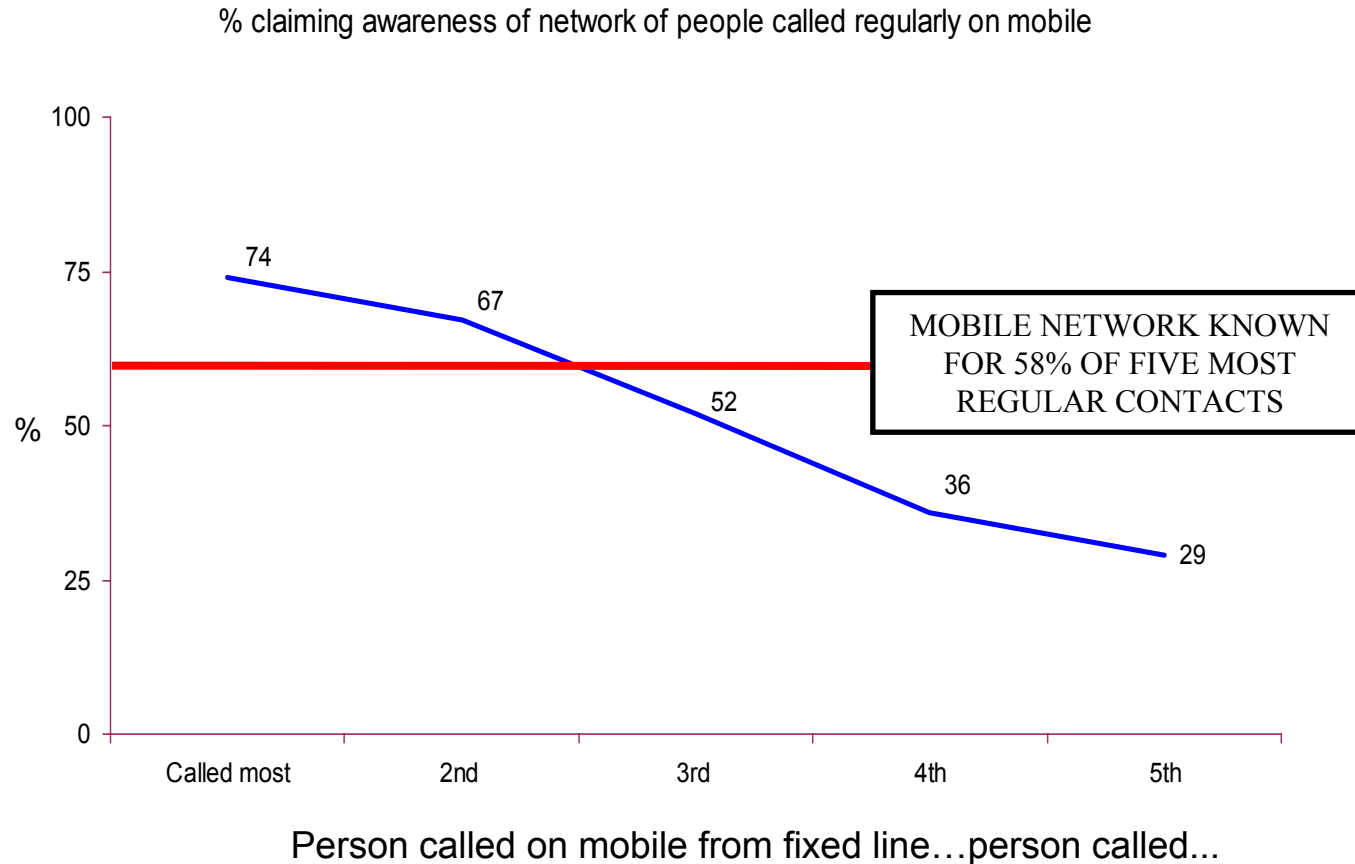
How many people do you call **more than once a month** on their mobile phone from your home phone?



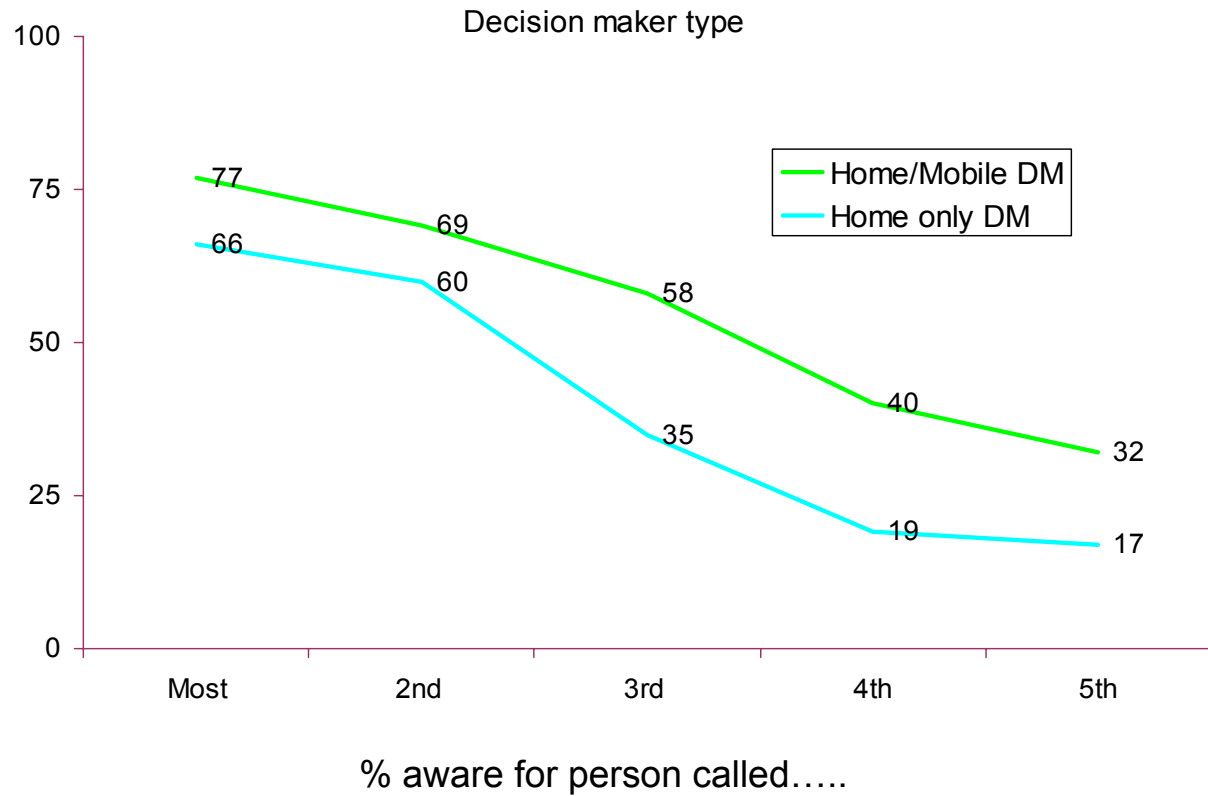
Base: All who make calls to mobile from home phone at least once per month (n=411)

Awareness of mobile network being called

Awareness of mobile network calling - amongst people called regularly on mobile

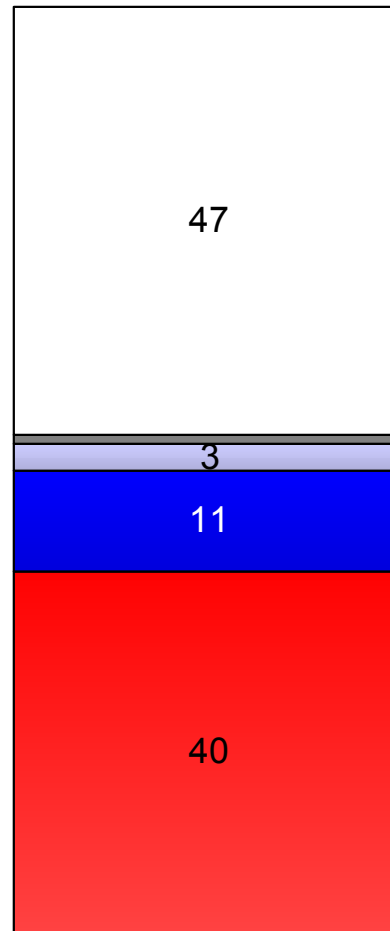


Awareness of mobile network calling - amongst people called regularly on mobile



Knowledge of how to identify mobile network being called

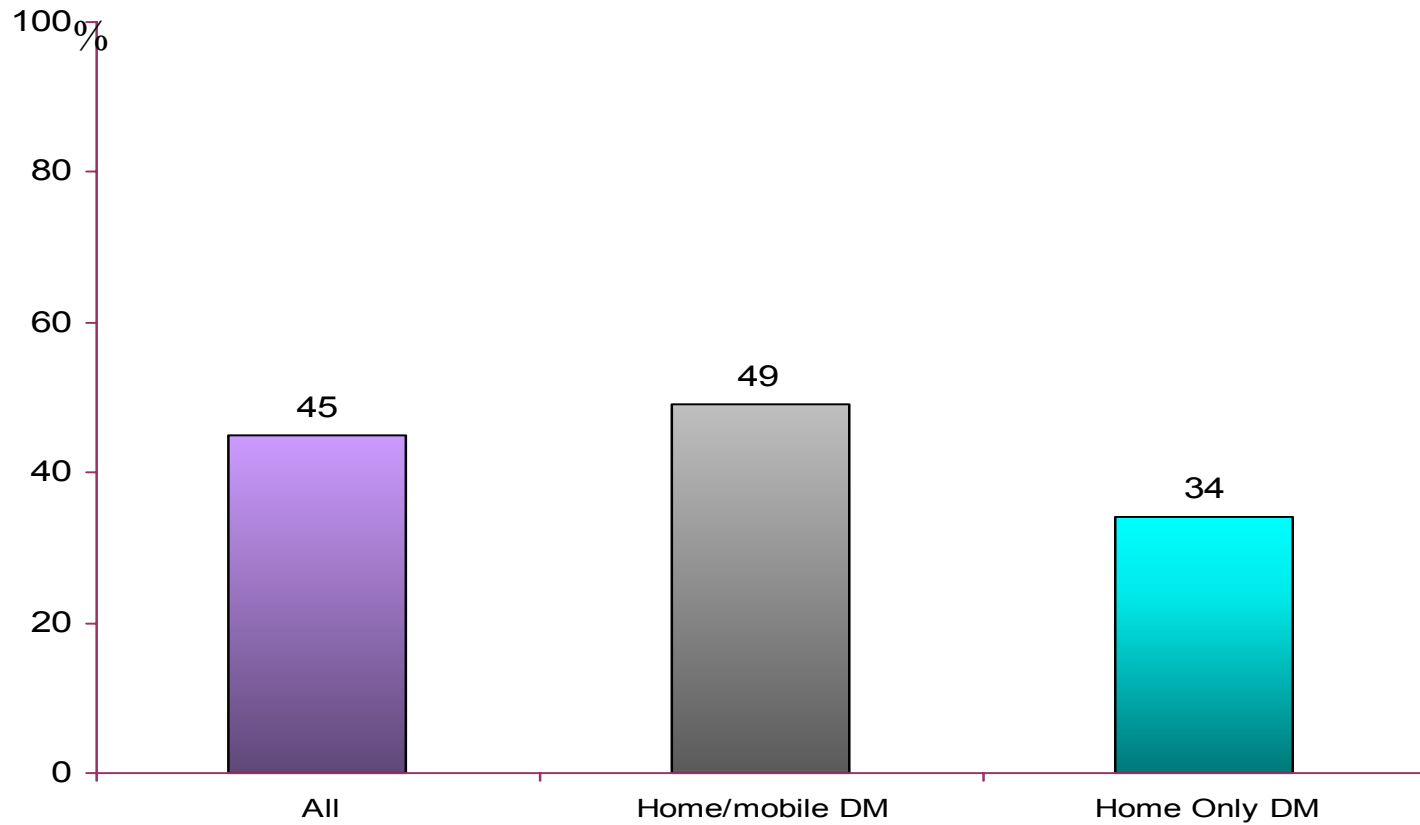
'When making calls from your *home* phone to a mobile phone how would you identify the mobile network being called?'



- DK/Don't care
- Mobile shows provider
- Billing Info'
- Prefix
- Knowing about person being called

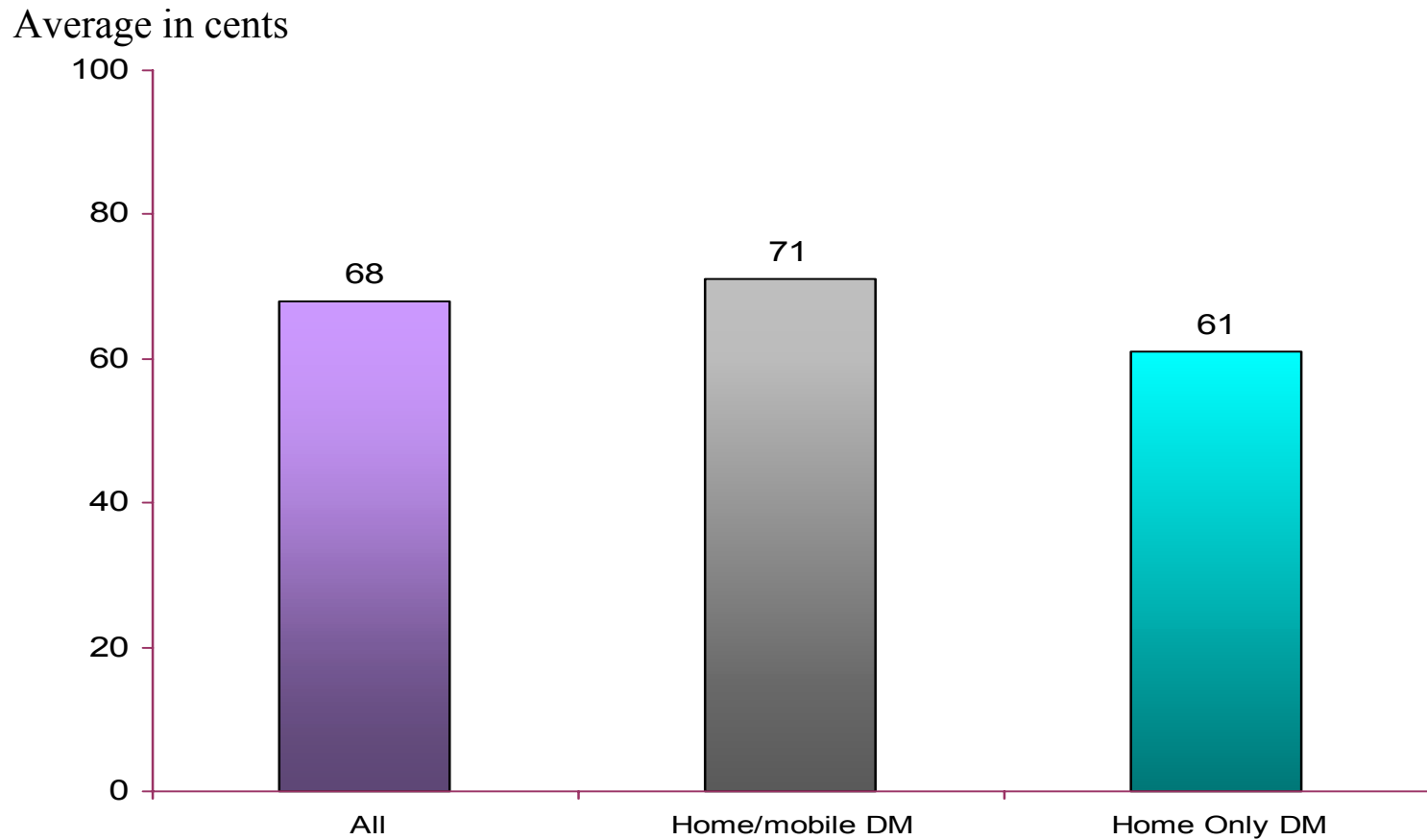
Cost perception of calls to mobiles from home phone

Perception of home to mobile cost per minute % WITH NO IDEA OF COST



Base: All who make calls to mobile from home phone at least once per month (n=411)

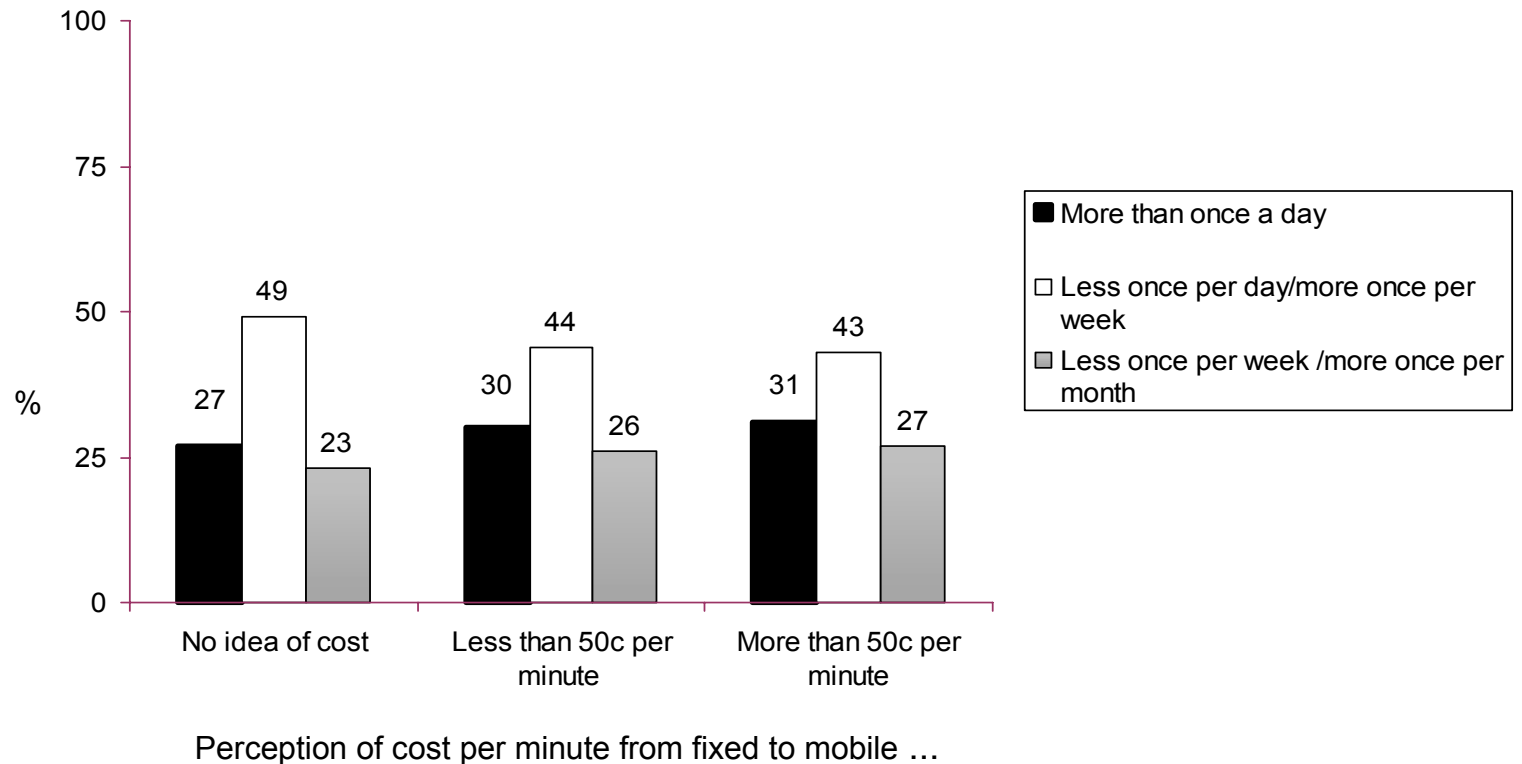
Perception of fixed to mobile cost per minute in cents



Base: All who make calls to mobile from home phone at least once per month and could make estimate (n=225)

Relationship between cost perception and usage

Usage of fixed to mobile calls



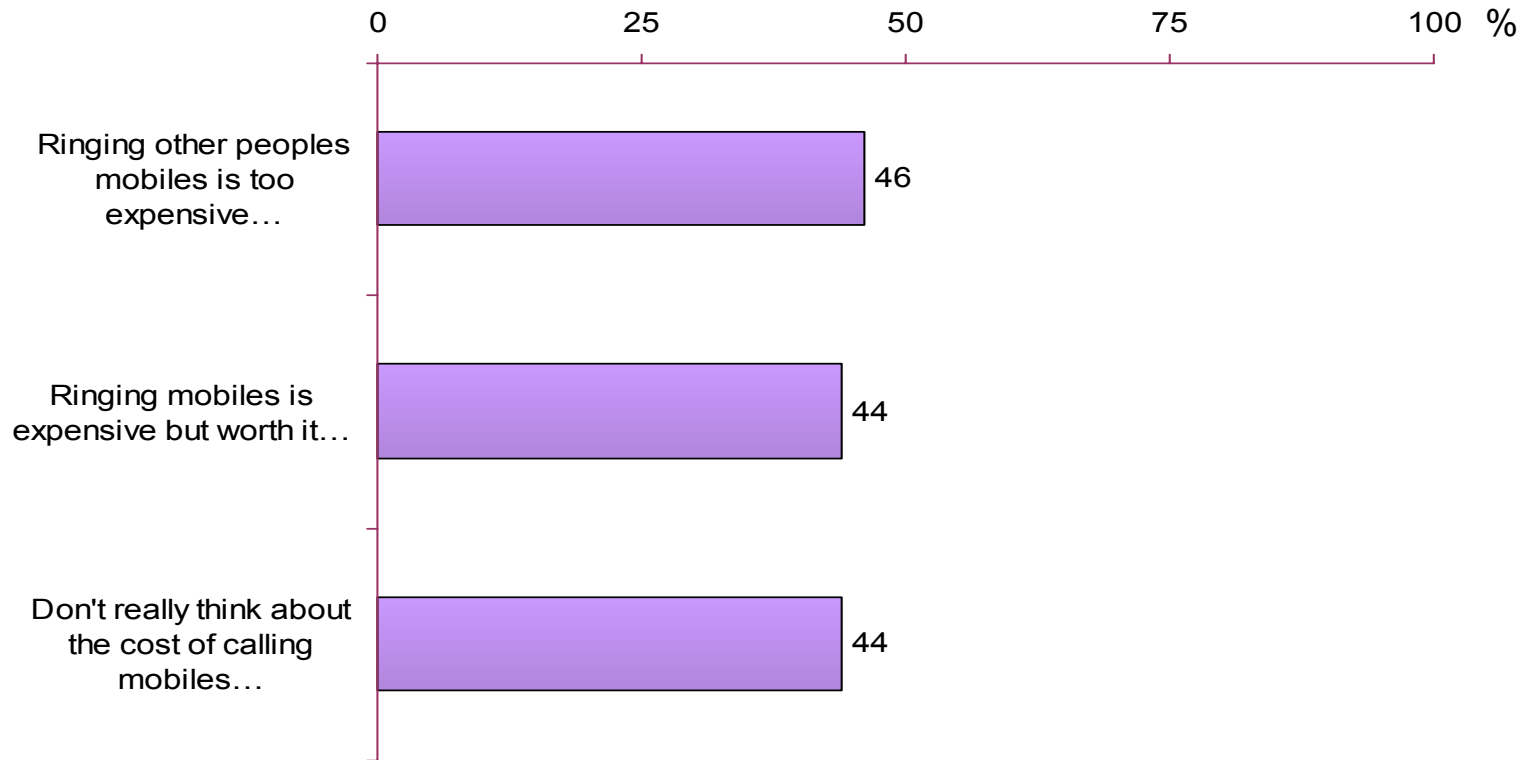
Attitudes to calling mobile phones

Attitudes towards calling mobile phones

Agreement with statements about calling mobile phones

(Mean scores where 0 = disagree strongly and 10 = agree strongly)

% agreeing strongly score 8-10



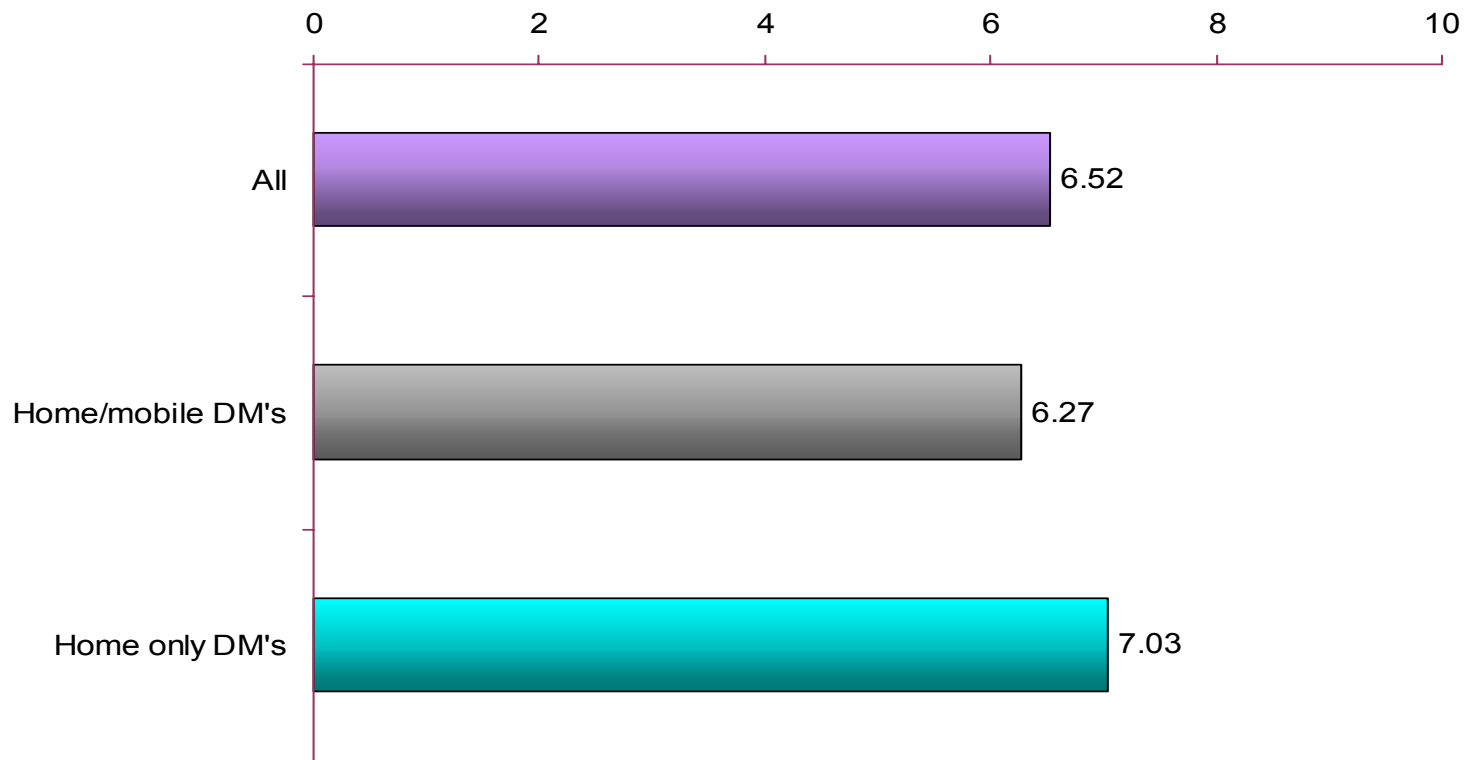
Base: All (n=500)

Attitudes towards calling mobile phones

Agreement with statements about calling mobile phones

(Mean scores where 0 = disagree strongly and 10 = agree strongly)

'Ringing other peoples mobiles is too expensive and I avoid it unless I need to contact somebody urgently



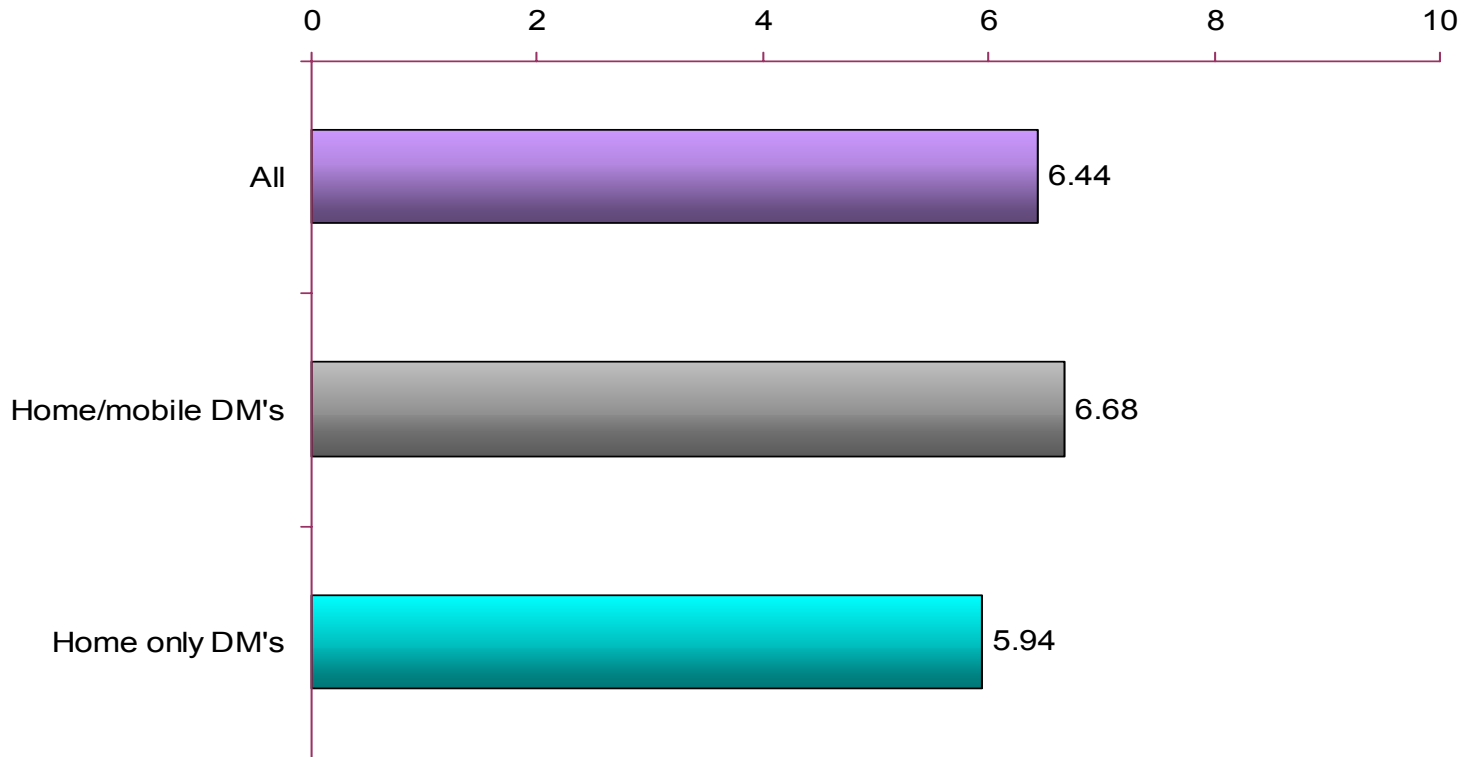
Base: All (n=500)

Attitudes towards calling mobile phones

Agreement with statements about calling mobile phones

(Mean scores where 0 = disagree strongly and 10 = agree strongly)

'Calling a mobile is more expensive than calling a home phone, but it is worth it because it's the easiest way to contact people



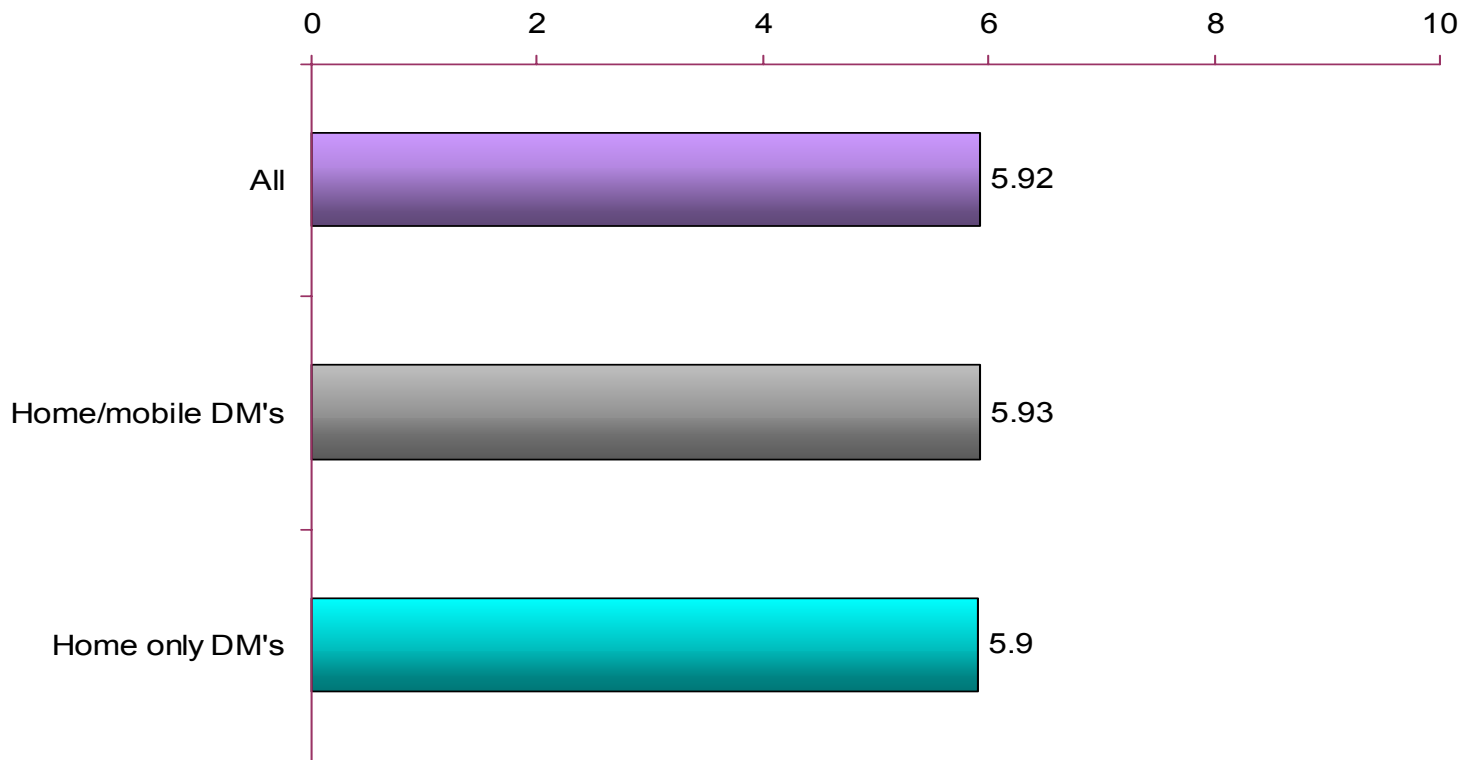
Base: All (n=500)

Attitudes towards calling mobile phones

Agreement with statements about calling mobile phones

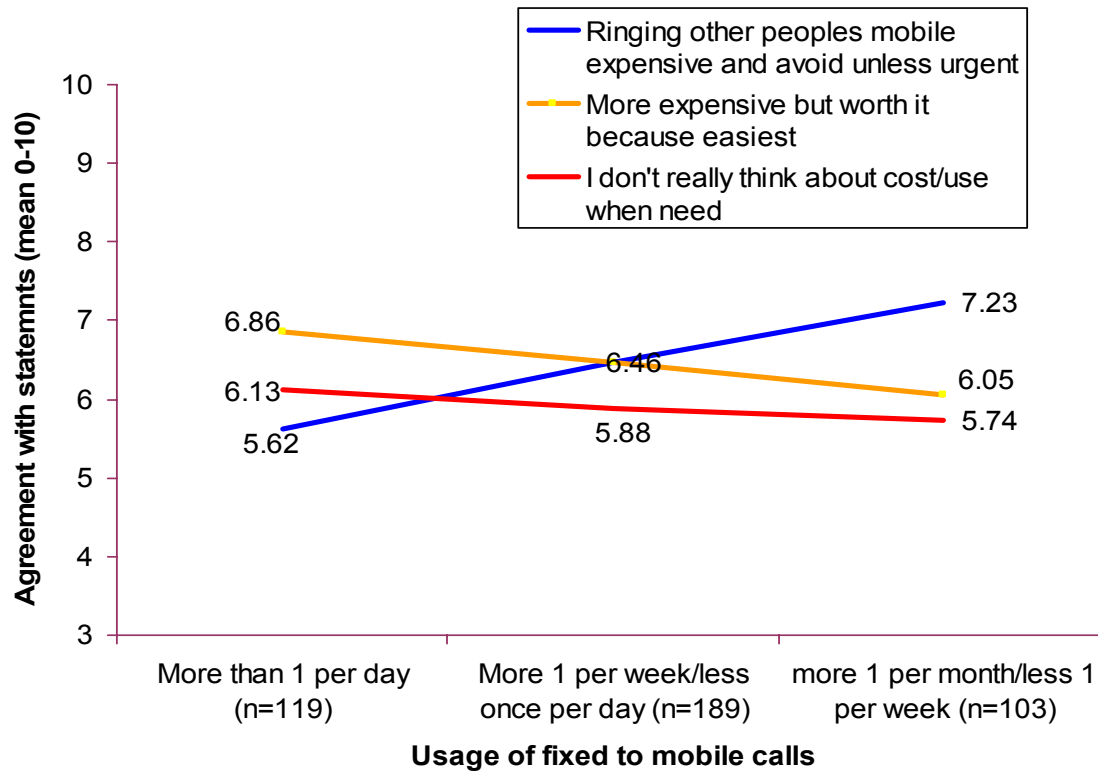
(Mean scores where 0 = disagree strongly and 10 = agree strongly)

'I don't really think about the cost of calling other peoples mobiles, I just use it when I need it



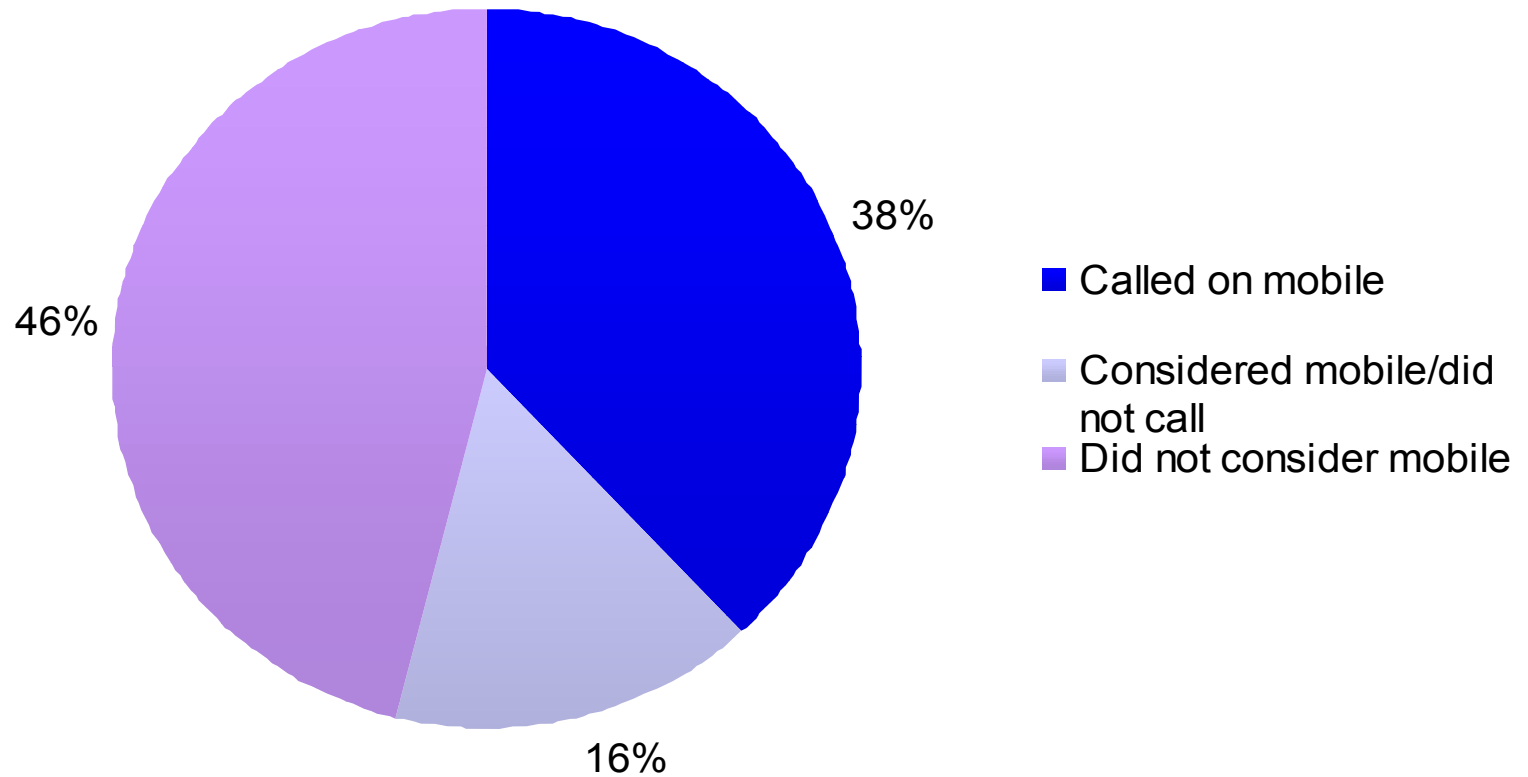
Base: All (n=500)

Relationship between attitudes to ringing mobiles and usage



Consideration of calling mobile from fixed line

‘On the last occasion you called one of these people from your home phone.... Did you consider calling them on their mobile?’



Base: All who call at least one person regularly on their mobile from their home phone (n=367)

Reason for calling a mobile from home phone

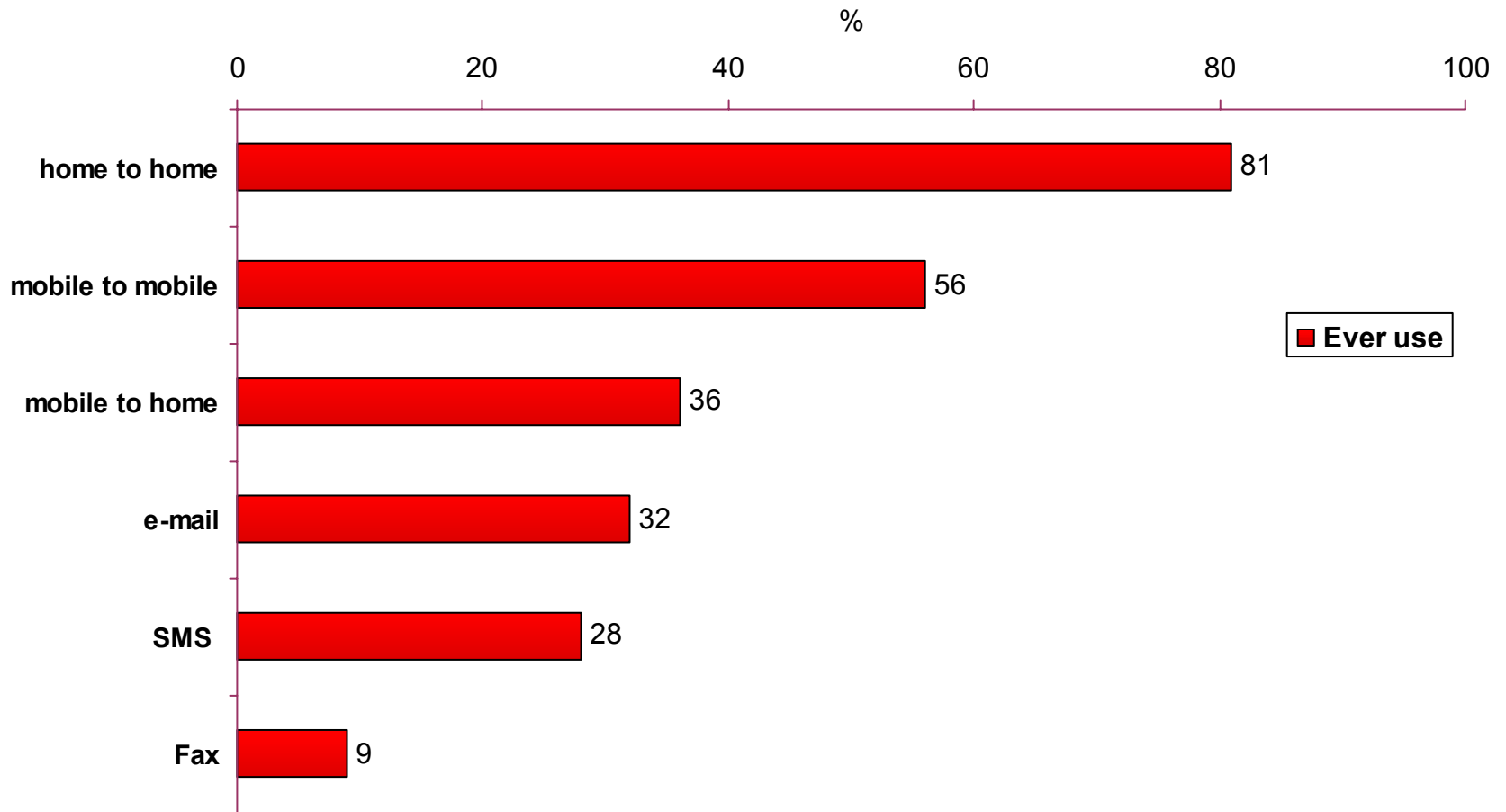
<i>'In what circumstances would you choose to call people on their mobile when calling from your home phone rather than contacting them another way'</i>	% (n=367)
Can't be contacted by any other means (e.g. on the road/not at home)	64
When urgent to contact them	16
They only have a mobile (as far as known)	13
Easier/convenient	6
Other	3

Base: All who call at least one person regularly on their mobile from their home phone (n=367)

Usage of substitutes to fixed to mobile

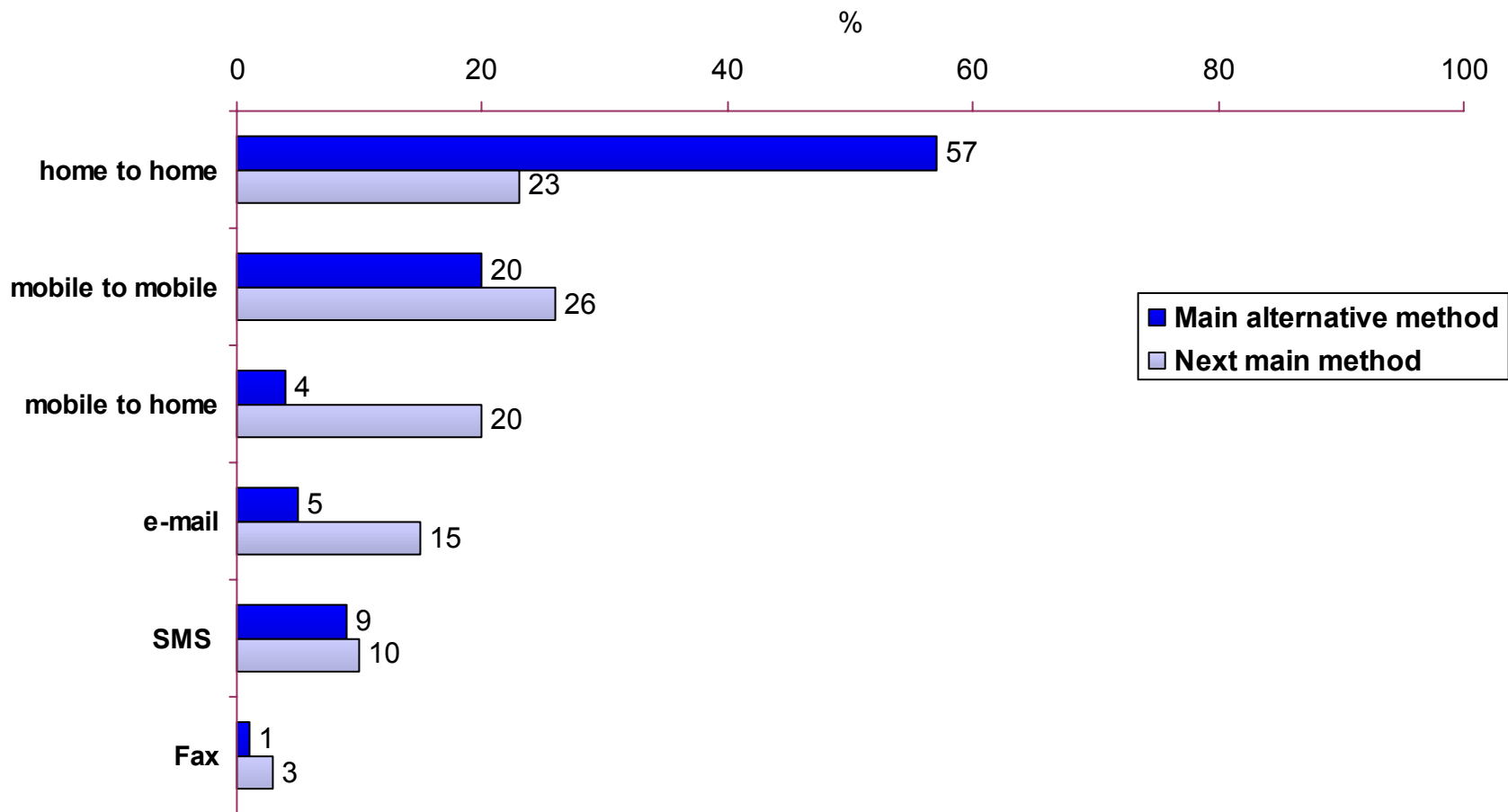
Substitutes to fixed to mobile calls Ever use

'If you don't call them on their mobile from your home phone, in which of the following ways do you ever contact them?'



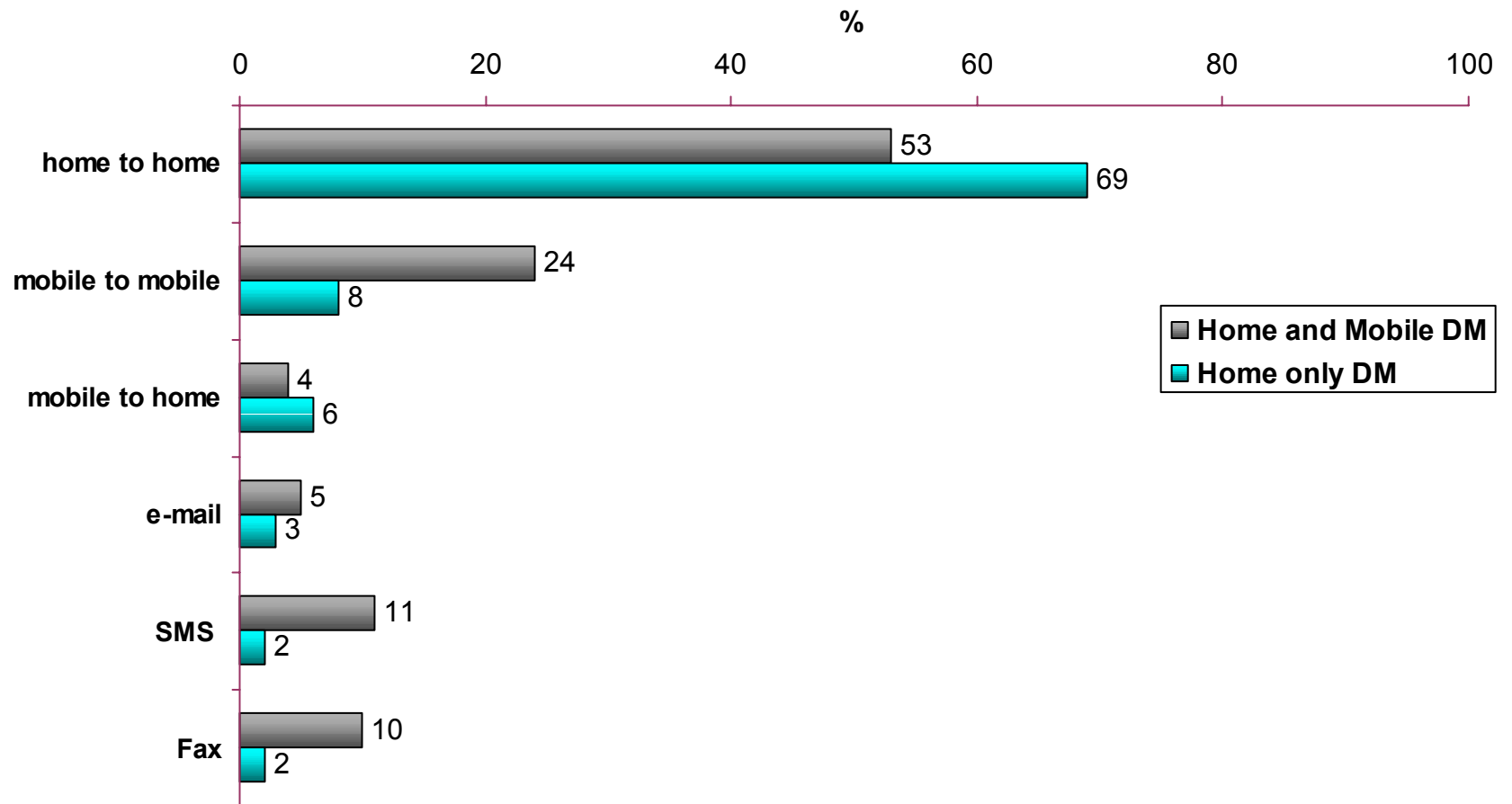
Substitutes to fixed to mobile calls Main/next most often used

'If you don't call them on their mobile from your home phone, in which of the following ways do you ever contact them?'



Substitutes to home to mobile calls – MAIN method by decision maker type

'If you don't call them on their mobile from your home phone, in which of the following ways do you ever contact them?'

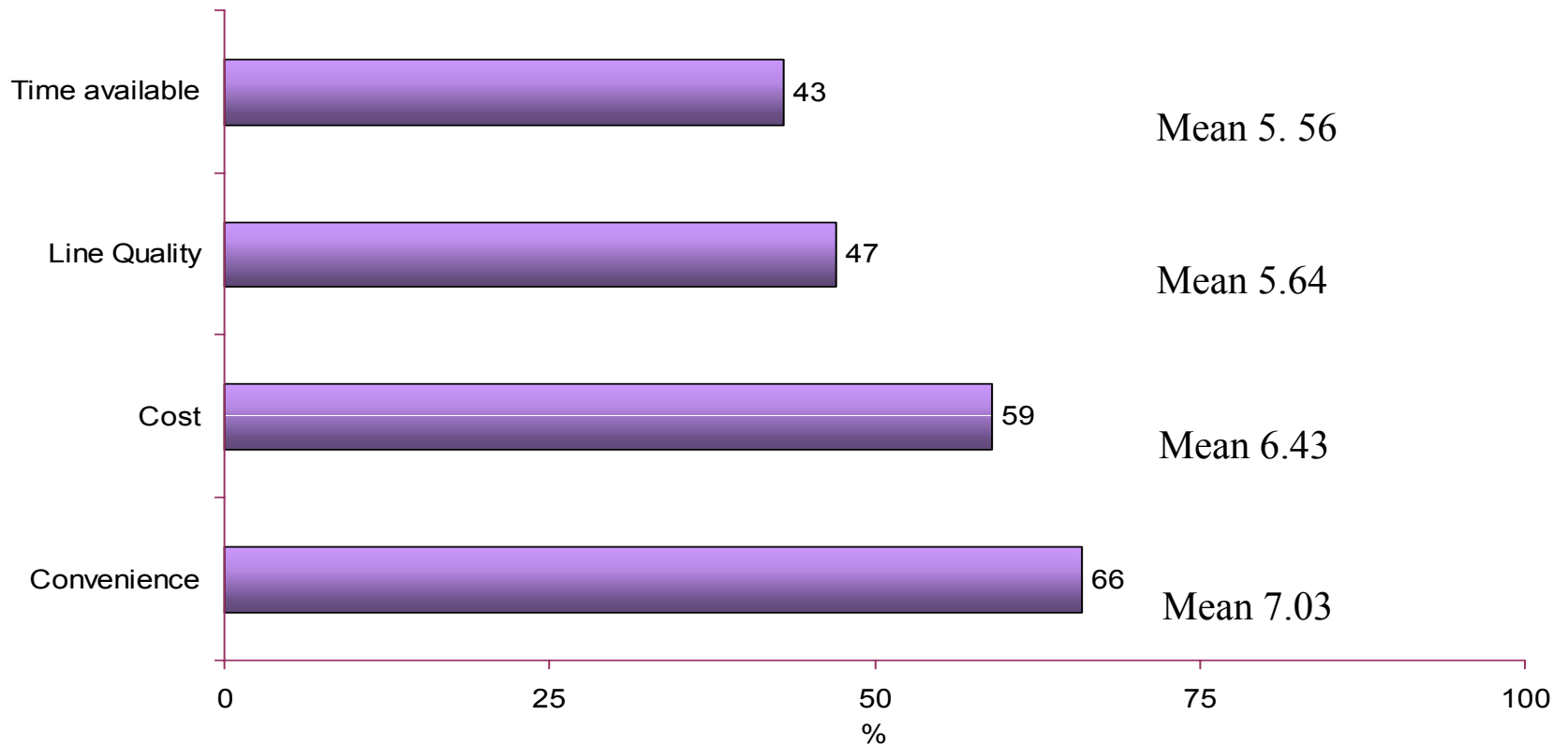


Reasons for calling mobile from fixed line and reasons for using substitutes

Self stated importance of factors in choosing main alternative to fixed to mobile contact

(% scoring 6+ where 0 = not at all important and 10 = Extremely important)

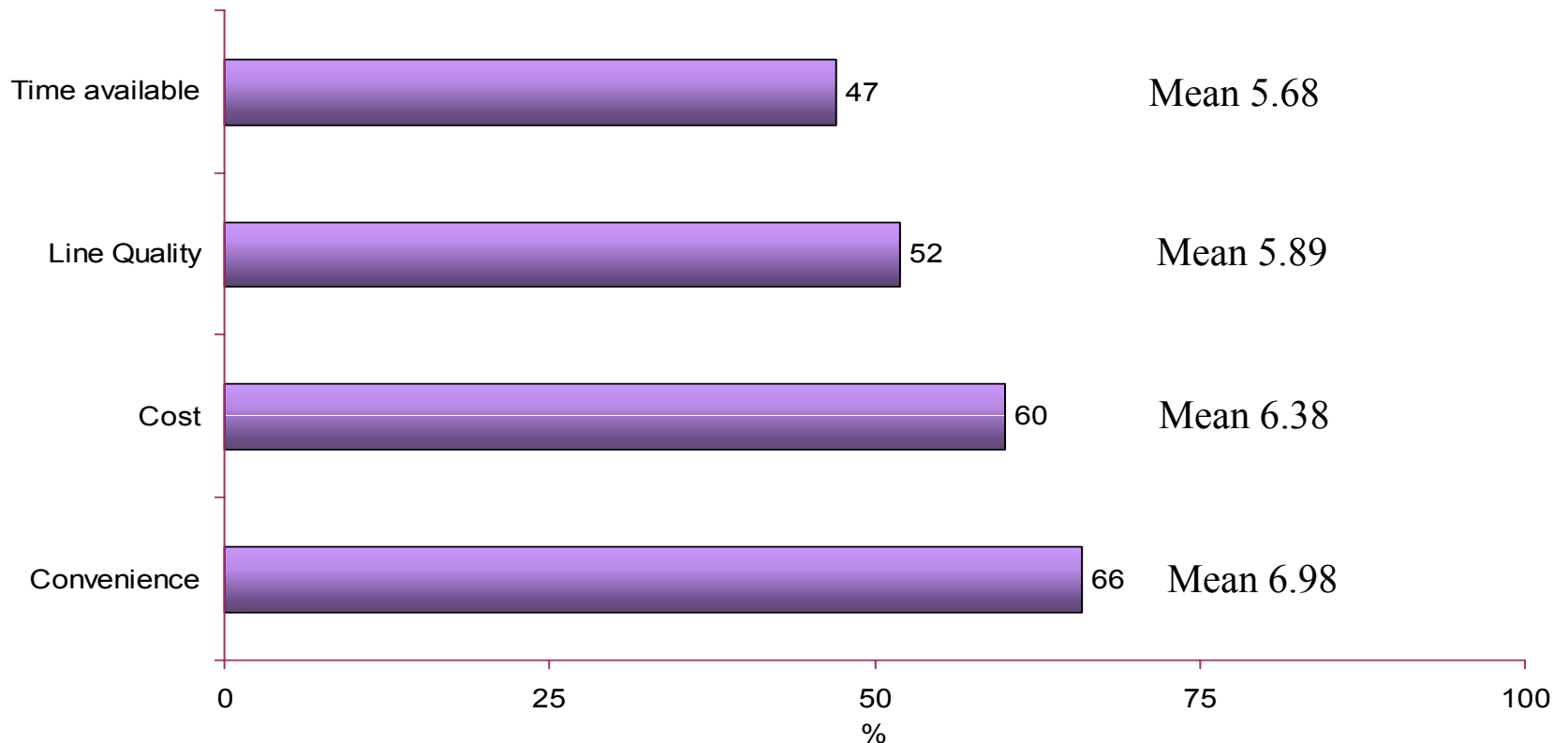
'How important would the following factors be in deciding **not to contact these people on their mobile** but to



Base: All who call at least one person regularly on their mobile from their home phone (n=367)

Self stated importance of factors in choosing to *call home line* rather than mobile from home phone (% scoring 6+ where 0 = not at all important and 10 = Extremely important)

'How important would the following factors be in deciding **not to contact these people on their mobile** but to call their home phone'

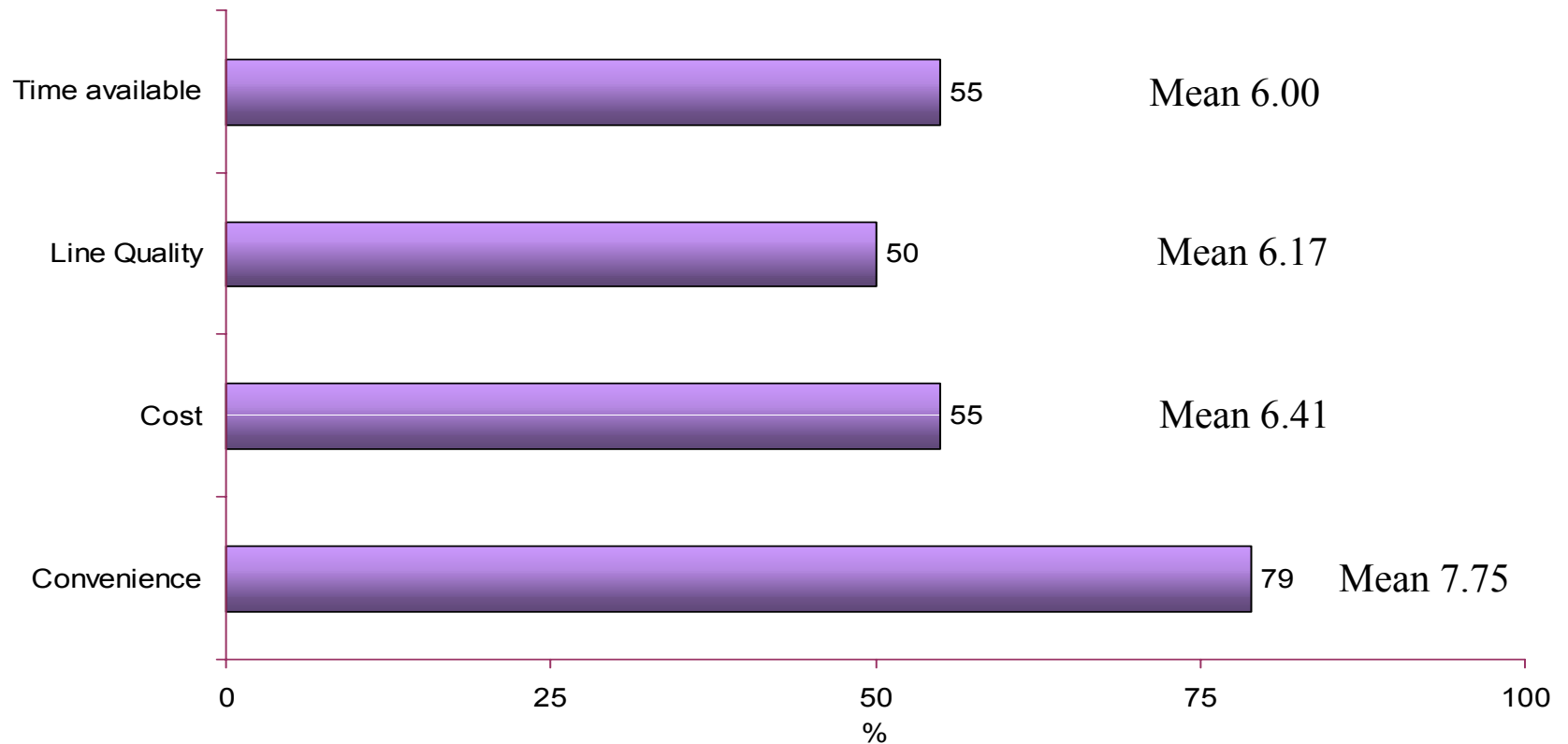


Base: All whose main or secondary method of contacting people is home phone to home phone (n=264)

Self stated importance of factors in choosing to *call on your mobile to their home phone* rather than to their mobile from your home phone

(% scoring 6+ where 0 = not at all important and 10 = Extremely important)

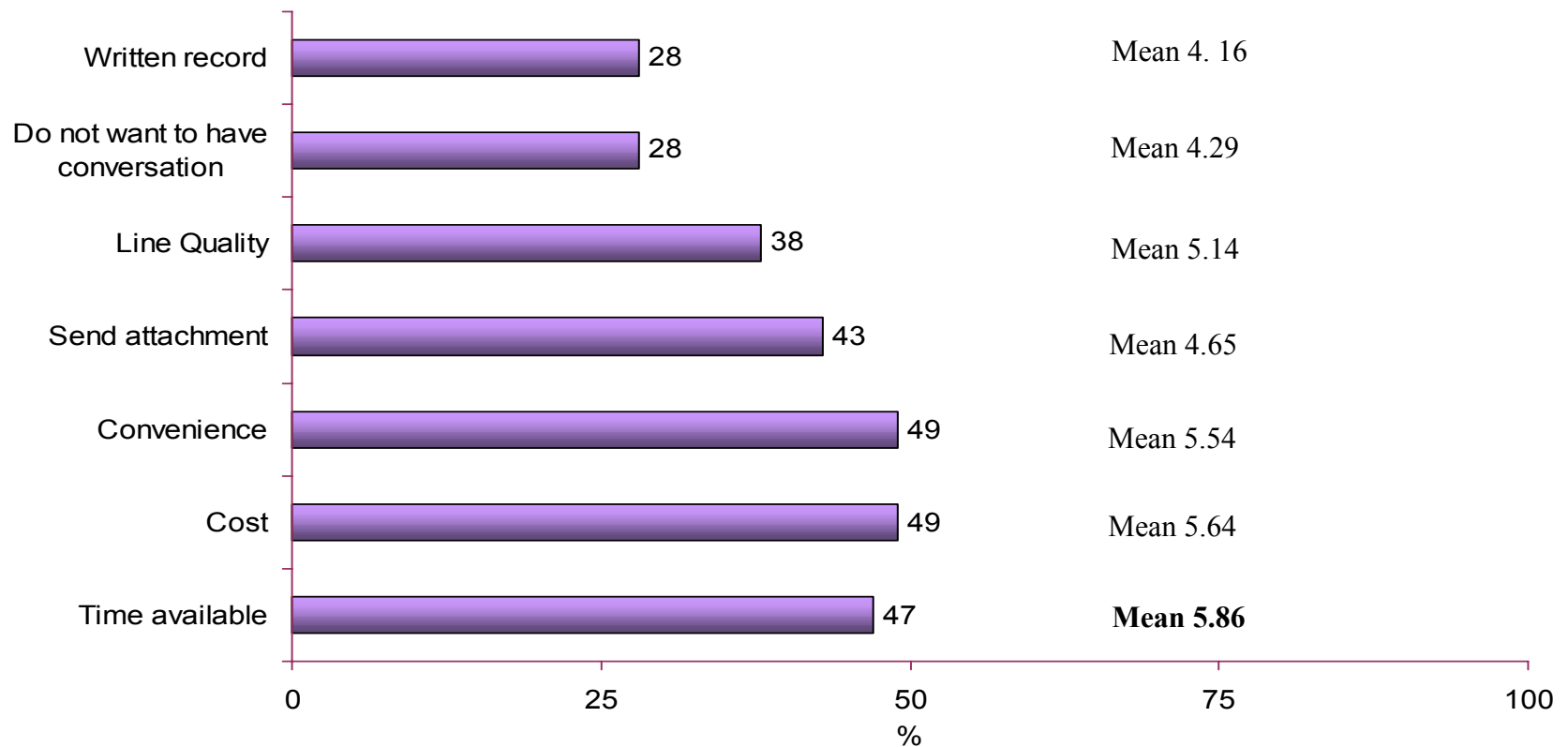
'How important would the following factors be in deciding **not to contact these people on their mobile** but to call their home phone from your mobile'



Base: All whose main or secondary method of contacting people is mobile to home phone (n=62)

Self stated importance of factors in choosing to e-mail rather than to call their mobile from your home phone (% scoring 6+ where 0 = not at all important and 10 = Extremely important)

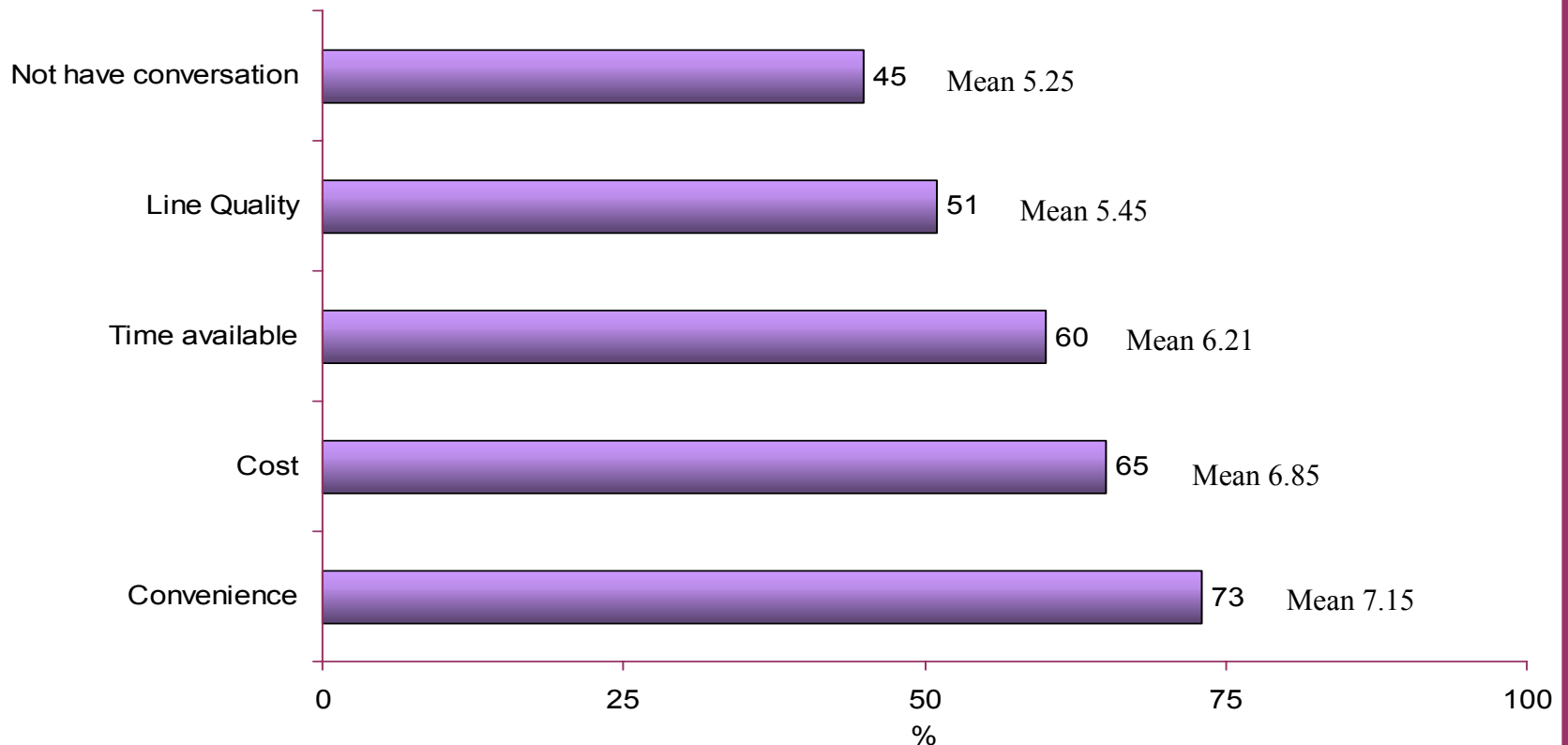
'How important would the following factors be in deciding **not to contact these people on their mobile** but to e-mail'



Base: All whose main or secondary method of contacting people is e-mail (n=53)

Self stated importance of factors in choosing to SMS rather than to call their mobile from your home phone (% scoring 6+ where 0 = not at all important and 10 = Extremely important)

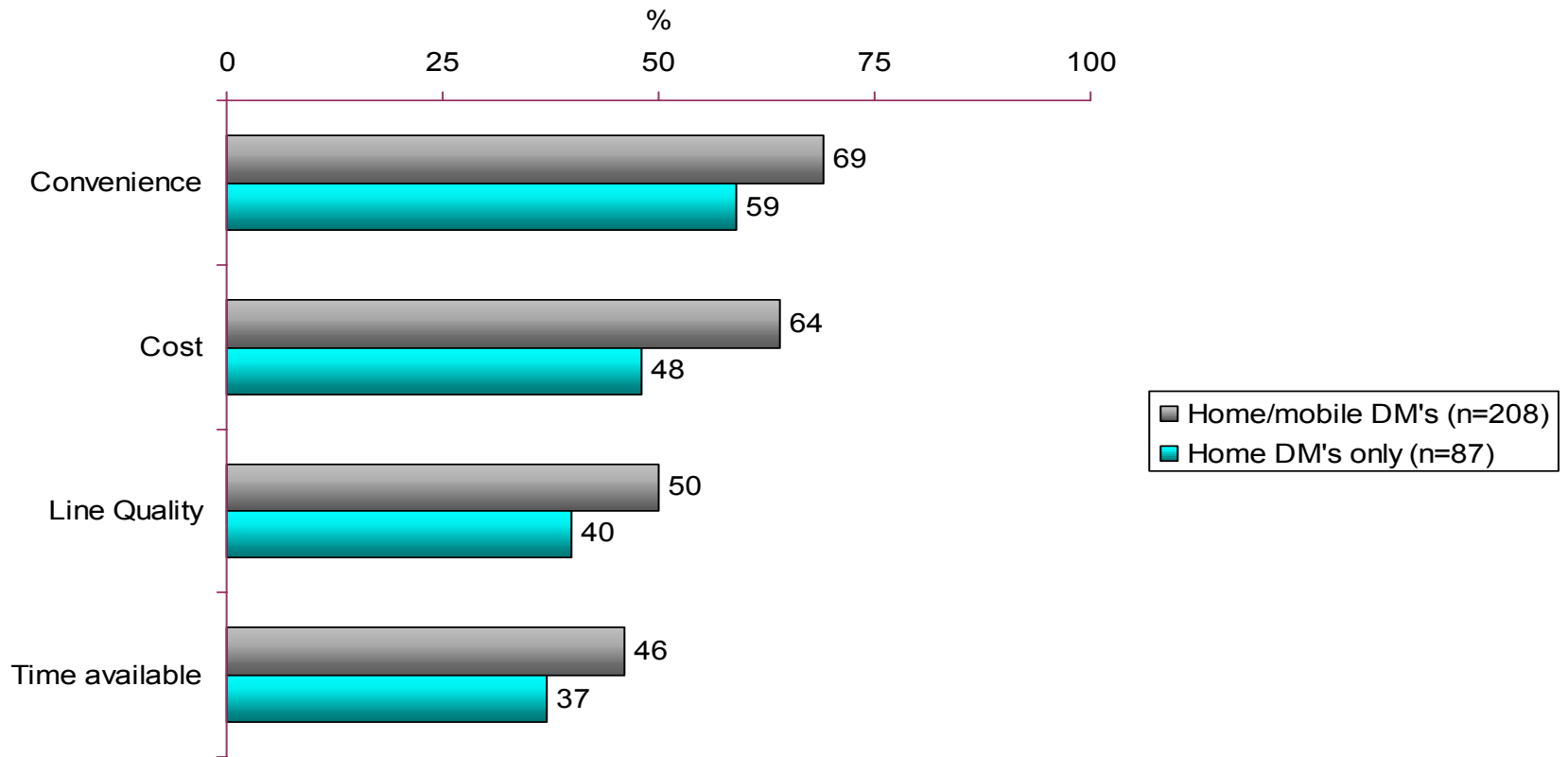
'How important would the following factors be in deciding **not to contact these people on their mobile but to SMS**'



Base: All whose main or secondary method of contacting people is SMS (n=55)

Self stated importance of factors in choosing main alternative to fixed to mobile contact by main decision maker type (% scoring 6+ where 0 = not at all important and 10 = Extremely important)

'How important would the following factors be in deciding **not to contact these people on their mobile** but to

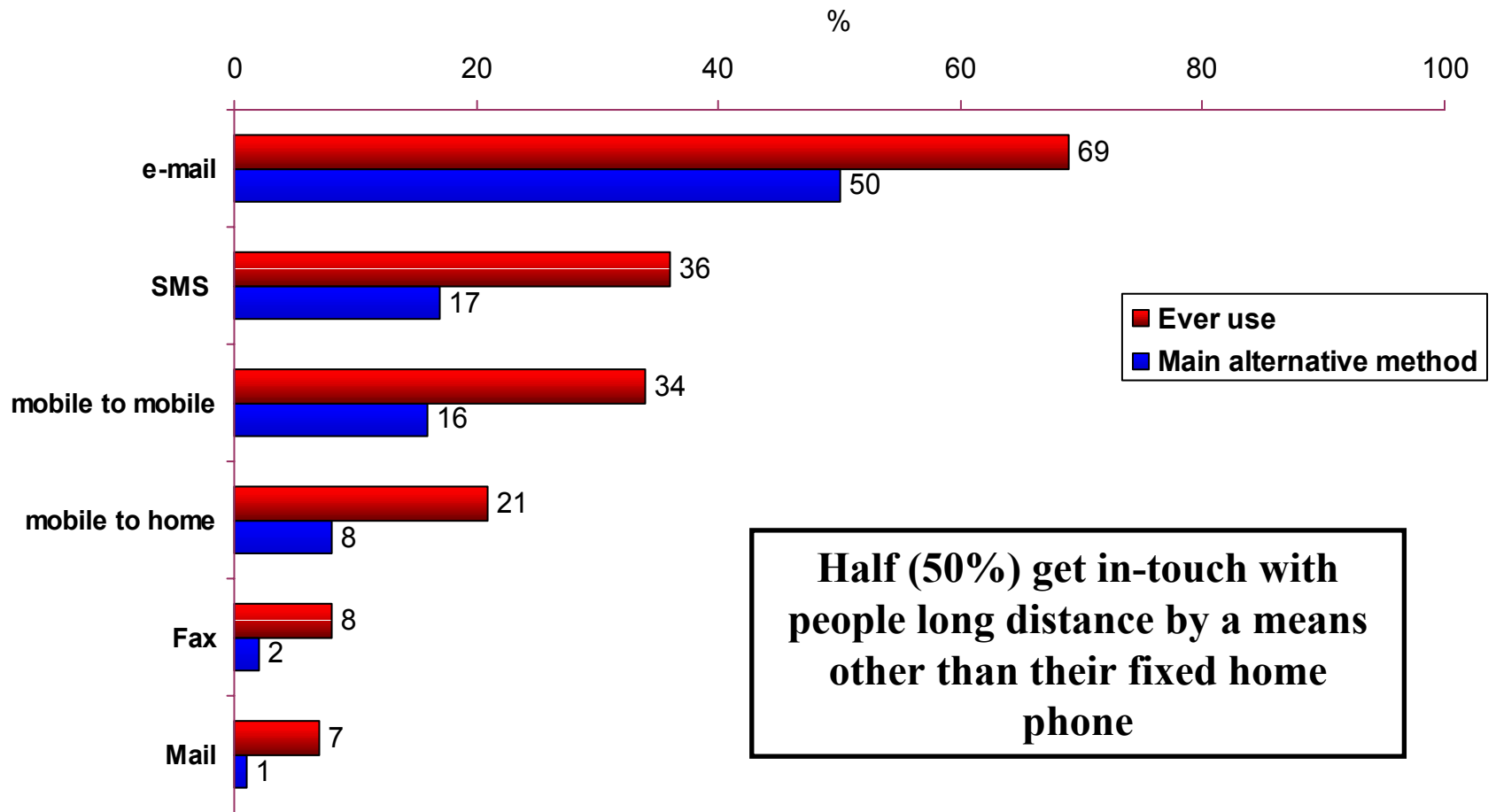


Base: All who call at least one person regularly on their mobile from their home phone (n=367)

Alternatives to fixed (home) line calls to long distance contacts

Alternatives to using home phone for long distance contacts

'Thinking about the people that you regularly call long distance from your home phone. How else do you contact them?'

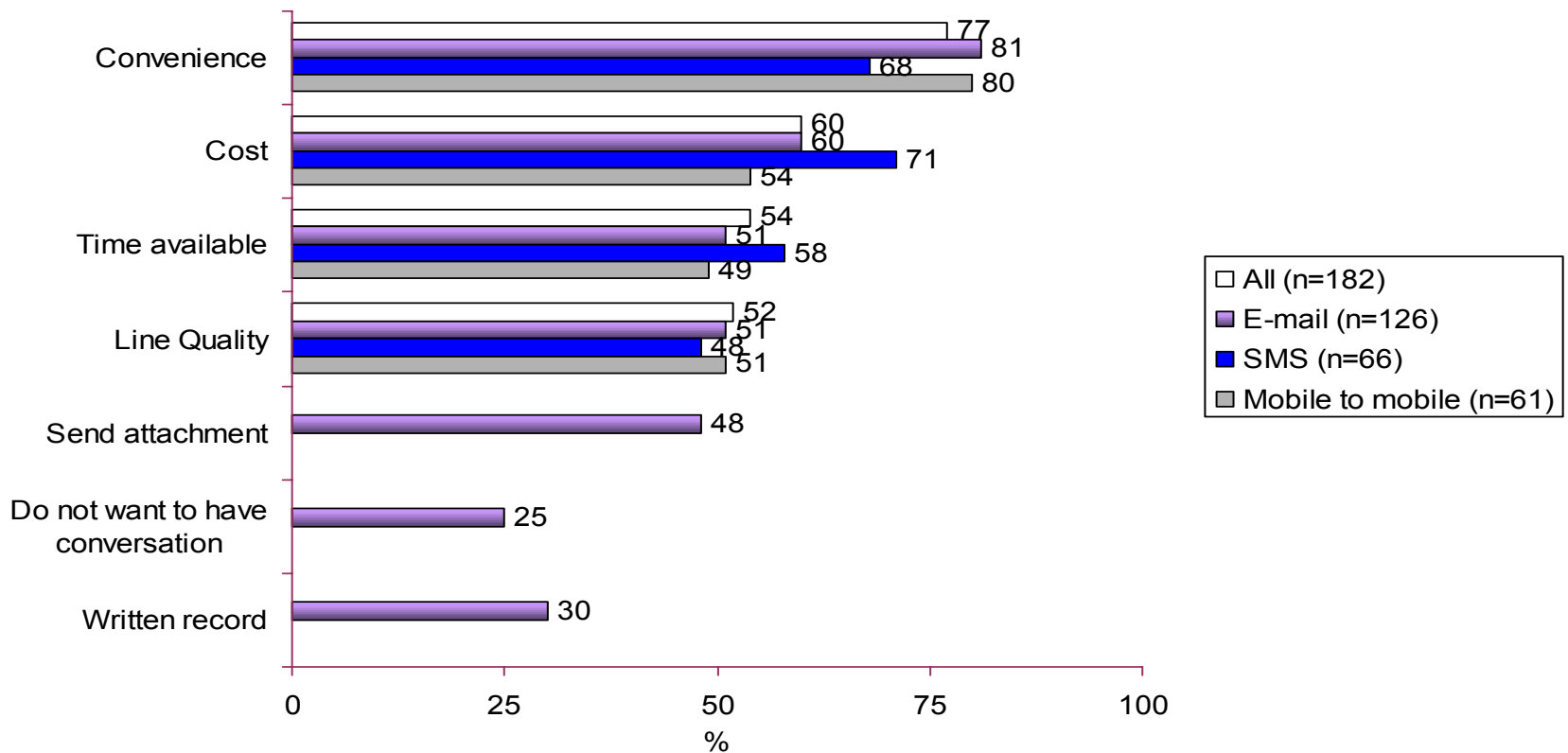


Base: All who make calls regularly from fixed to mobile phones and regularly contact people long distance other than by fixed home phone

Self stated importance of factors in choosing alternatives to home phone for long distance contacts

(% scoring 6+ where 0 = not at all important and 10 = Extremely important)

'How important would the following factors be in deciding to contact them by another method rather than from your home phone

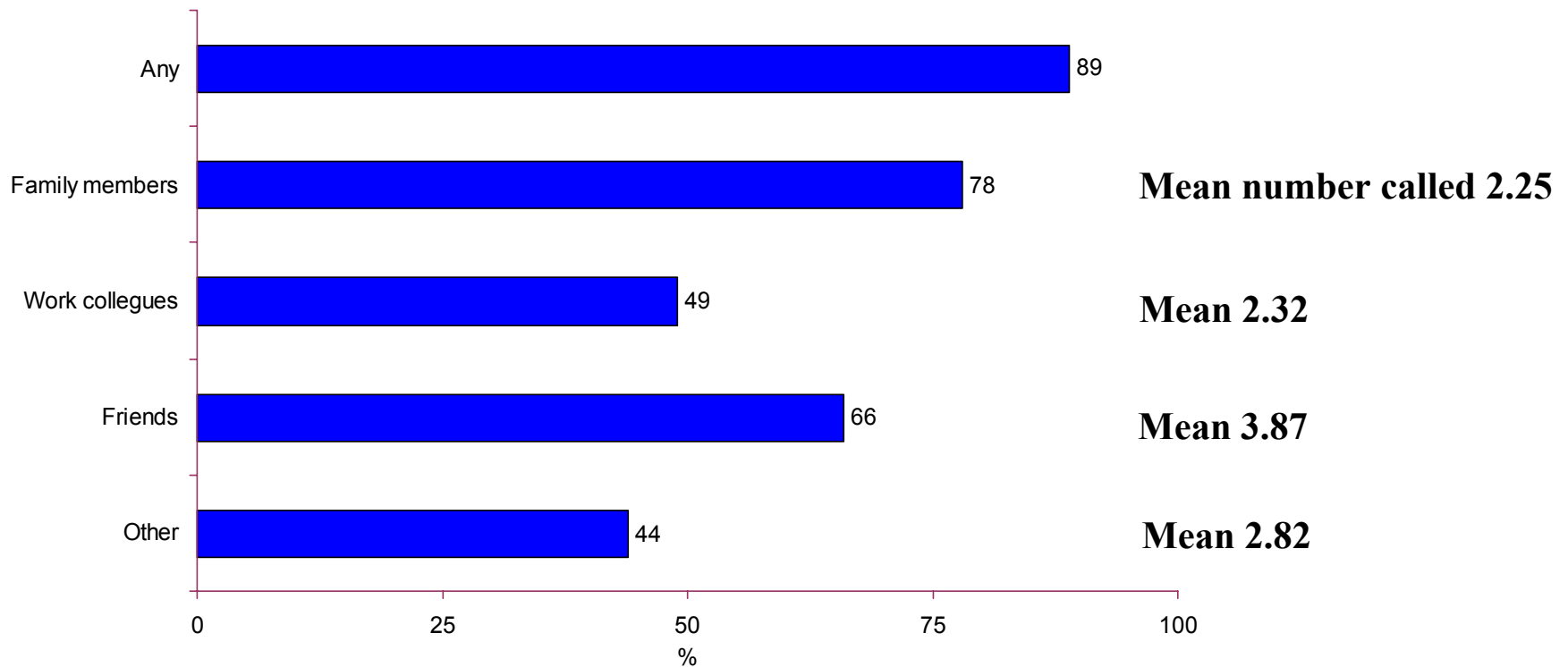


Base: All those ever using alternative method to home phone for contacting people long distance (n=182).

Mobile closed user groups

Calls from mobile to mobile (% calling at least one person called more than once a month within specific groups)

'How many of yourdo you call MORE THAN ONCE A MONTH on their mobile phone from your mobile phone?'

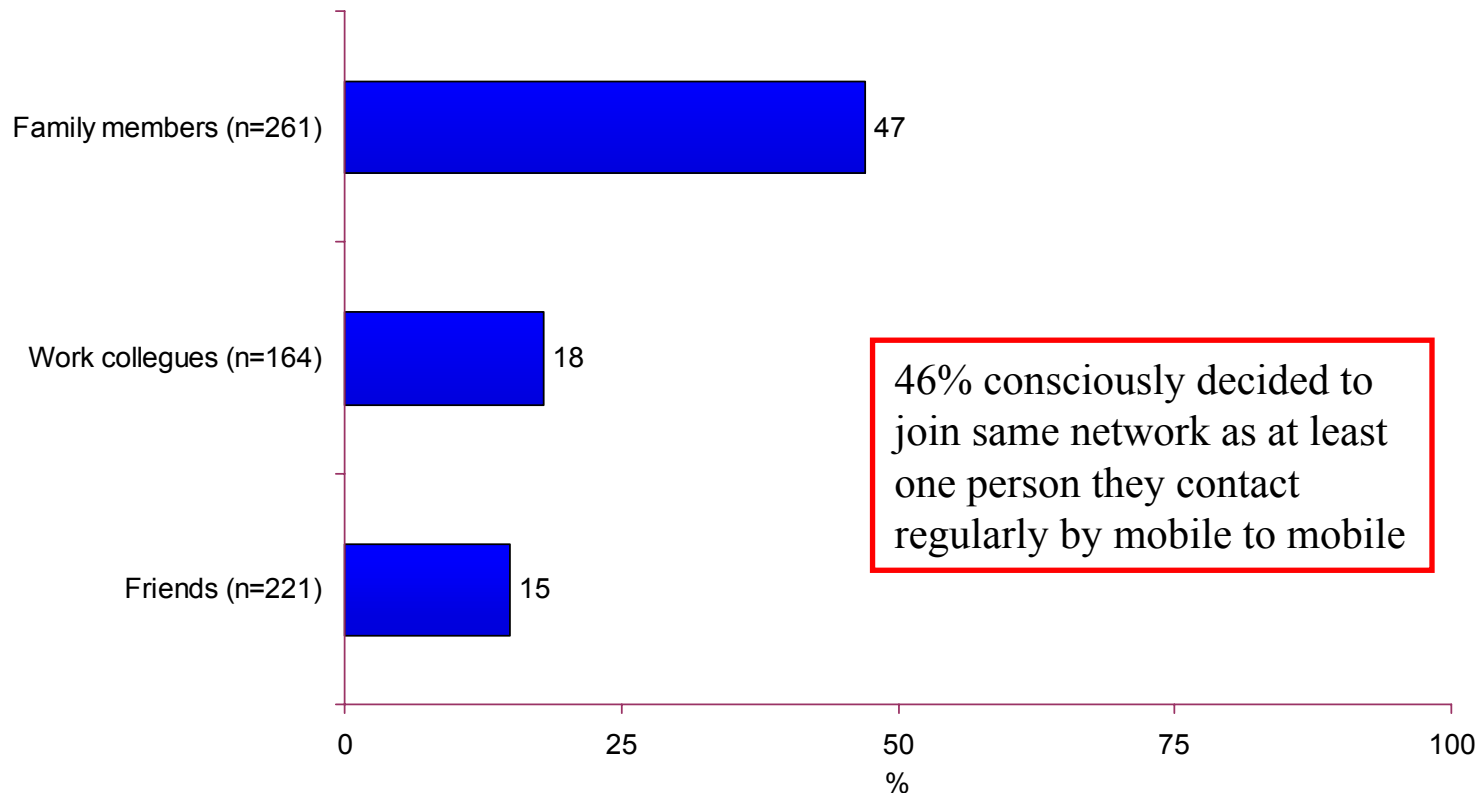


Base:All mobile Decision makers (n=333)

Closed user groups

(% who made a conscious decision to join same network as at least one member of specified user groups they have regular contact with)

'Did you and any of your make a conscious decision to subscribe to same mobile network'



Base: All mobile Decision makers who regularly call specified groups

Summary of key findings

- ***Most fixed line decision makers (84%) will make at least one call to a mobile per month and a significant numbers will make at least one a day.***
- ***Virtually all have somebody they call regularly from fixed to mobile and a third have a substantial network of people they contact this way (32% have 5 or more people they contact).***
- ***Most regular fixed to mobile callers would have to rely upon knowledge of the person they are contacting in order to know which mobile network they have called – this leaves a considerable knowledge gap should they wish to know.***
- ***A substantial proportion of regular Fixed to mobile callers were unaware of the cost per minute of this type of call (between four and five in ten).***
- ***The main reason for calling a mobile from the fixed line is that provides contactability that would not be possible otherwise.***

Summary of key findings

- ***Fixed to fixed line calling is the main substitute for fixed to mobile communications, though mobile (both voice and SMS) and e-mail methods are widely used.***
- ***While cost is a barrier to fixed to mobile usage for a significant number, many clearly believe that the benefits of mobiles outweigh the cost.***
- ***Cost was not the dominant factor in choosing to use other communication methods in preference to fixed to mobile calls. Convenience was equally and in some cases more important.***
- ***Over four in ten mobile decision makers consciously joined the same mobile network as somebody they regularly contact mobile to mobile – most often members of their family.***