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Electronic Communications Consumer Survey- December 2006

Key Findings

I. Telephone Service at a Fixed Location

Possession of fixed telephone and barriers to possession

1. According to this survey, in December 2006, **59.2 per cent of households had a fixed telephone**, approximately the same percentage as February 2006.

Table 1 - Possession of fixed network (%)

	Feb 06	Dec 06
Have fixed network	60.0	59.2
Do not have fixed network	40.0	40.8
Total	**100.0**	**100.0**

Source: Electronic Communications Consumer Survey – February and December 2006.

2. In December 2006, **4.2 per cent of those surveyed who were not on the fixed network expressed their intention to subscribe to the fixed telephone service within one year.**

3. According to the survey, the **main reason for not having a fixed telephone is the use of mobile phones** (75.3 per cent of responses).

The second most given reason was the monthly charge (19.5 per cent).

Table 2 - Reasons for not having a fixed-line telephone (%)

	Feb 06	Dec 06
Use mobile phone	61.2	75.3
Prefer not to pay monthly charge	16.5	19.5
It's cheaper to make calls by other means	5.0	2.0
Don't need	4.5	1.8
Other responses	6.2	0.9
Recent / rented house	1.1	0.3
Too expensive	4.2	0.0
Don't know / Didn't respond	1.3	0.3
Total	**100.0**	**100.0**

Source: Electronic Communications Consumer Survey – February and December 2006

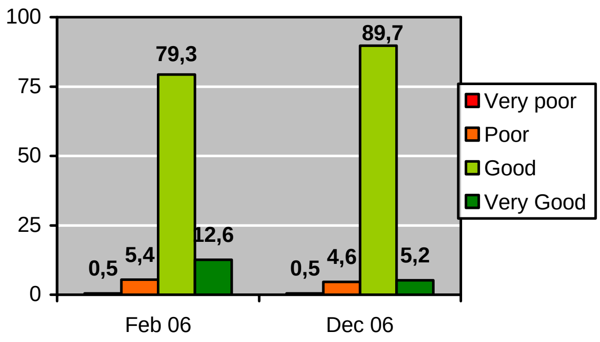
Satisfaction with quality of fixed network

4. The proportion of positive responses on the quality of the fixed network increased by 3 per cent between February and December 2006.

94.9 of responses were "*good*" or "*very good*".

However, at the same time the proportion of "*very good*" responses fell by 7.4 per cent.

Graph 1 - Consumer perception of fixed-network quality (%)



Source: Electronic Communications Consumer Survey – February and December 2006

Operator share of fixed-line service

5. According to the survey, **82.2 per cent of households with fixed network are customers of PT**, followed by Tele2 (13.1 per cent), and Cabovisão (7.4 per cent).

PT is the most used operator for making calls (68.8 per cent), followed by Tele2 (12.9 per cent).

Table 3 - Operator share of fixed-line service (%)

	Client's or subscriber's operator Dec 06	Operator used for making calls Dec 06
PT	82.2	68.8
Tele2	13.1	12.9
Cabovisão	7.4	7.2
Novis	4.1	4.0
Clix	3.5	3.5
ONI	3.4	3.2
Others	0.3	0.9

Source: Electronic Communications Consumer Survey – December 2006
Note: Multiple responses.

6. In December 2006, **16.3 per cent of fixed telephone service customers used more than one fixed network operator.** In February 2006, this percentage stood at 19.1 per cent.

Note that this trend can explained by the fact that in the period between February and December 2006, there was a **decline of 9 per cent in the number of respondents using call-by-call selection and of 15.2 per cent in the number of respondents using operator pre-selection.** These percentages now stand respectively at 22 and 34 per cent of FTS customers.

Table 4 – Call-by-call selection and pre-selection (%)

	Call-by-call selection		Pre-selection of operator	
	Feb 06	Dec 06	Feb 06	Dec 06
Used	31.0	22.0	49.2	34.0
No longer used	23.2	20.2	12.1	8.5
Never used	15.8	16.0	12.0	15.6
Not aware	7.8	21.5	8.2	22.1
Don't know / Didn't respond	22.2	20.3	18.5	19.7
Total	**100.0**	**100.0**	**100.0**	**100.0**

Source: Electronic Communications Consumer Survey – February and December 2006.

Switching fixed network operator

7. In December 2006, **40.6 per cent of customers of the fixed telephone services had switched fixed network operators at least once**. Of these, 85.5 per cent used fixed number portability.

8. "***Dissatisfaction with prices***" continued to be the main reason given for switching operator (48.9 per cent). The fact that **"New *operator does not have monthly charge*"** is the second most given reason, with the proportion of these responses having increased by 13 per cent compared to February 2006.

Table 5 – Reasons for switching fixed operator (%)

	Feb 06	Dec 06
Dissatisfaction with prices	64.7	48.9
New operator does not have monthly charge	6.0	19.0
Interested in trying out new services/products	8.1	9.9
Previous operator did not offer a package including the possibility of Internet access and TV	2.0	5.7
Dissatisfaction with quality of service	4.0	5.6
Previous operator did not offer a package including the possibility of Internet access	6.4	2.9
Most of my contacts are clients of new operator	0.2	2.4
Other responses	7.6	3.3
Don't know / Didn't respond	1.1	2.2
Total	**100.0**	**100.0**

Source: Electronic Communications Consumer Survey – February and December 2006

II. Mobile telephone service

Possession and advantage of mobile phone

9. In December 2006, and according to this survey, **87.7 per cent of residents in Portugal of over 15 years of age had a mobile phone**, 3.2 per cent more than in February.

Table 6 - Possession of mobile phone (%)

	Feb 06	Dec 06
Have mobile phone	84.2	87.7
Do not have mobile phone	15.8	12.3
Total	**100.0**	**100.0**

Source: Electronic Communications Consumer Survey – February and December 2006

10. The main **advantage of the mobile service over the fixed service is the possibility of always being contactable (49.1 per cent of responses)**. Mobility is the second most given reason (39.9 per cent of responses).

Table 7 - Advantage of the mobile service over the fixed service (%)

	Dec 06
Being always contactable	49.1
Mobility	39.9
No monthly charge	6.3
Price of calls	2.7
Other responses	2.0
Total	**100.0**

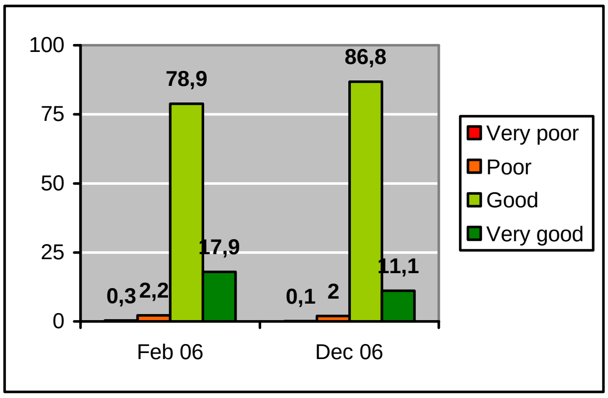
Source: Electronic Communications Consumer Survey – December 2006.

Satisfaction with quality of mobile service

11. Users of the mobile service are satisfied with the quality of service (97.9 per cent).

However, at the same time the proportion of those responding *"very good"* fell by 6.8 per cent.

Graph 2 - Consumer perception of fixed-network quality (%)



Source: Electronic Communications Consumer Survey – February and December 2006.

Customer share and operator switching

12. According to the survey**, TMN is the operator with the largest share of customers** (45.3 per cent).

Table 8 – Mobile operator share(%)

	Dec 06
TMN	45.3
Vodafone	38.7
Optimus	14.7
Uzo	0.8
Rede 4	0.3
Yorn	0.2
Total	**100.0**

Source: Electronic Communications Consumer Survey – December 2006.

13. In December 2006, **19.9 per cent of mobile service customers had already switched operator**, 0.6 per cent more than in February 2006.

14. The main reason given for switching mobile operator is the fact that **"Most *of* [the customer's] *contacts are customers of new operator"*** (44.6 per cent, 10 per cent more than in February 2006).

Dissatisfaction with prices remains the second most given reason (33.8 per cent).

Table 9 - Reason for switching mobile operator (%)

	Feb 06	Dec 06
Most of my contacts are customers of new operator	34.6	44.6
Dissatisfaction with prices	33.3	33.8
Dissatisfaction with quality of service	13.7	15.5
Offer of other network handset	8.6	6.8
Receive many call of new operator		4.6
Lack of network coverage		3.2
Decision of company		1.3
Change handset		1.0
Other responses	20.6	3.3
Don't know / Didn't respond		2.5

Source: Electronic Communications Consumer Survey – February and December 2006

Note: Multiple responses.

15. According to the survey**, the percentage of customers using mobile number portability increased** by 2.5 per cent and now stands at 4.7 per cent.

Table 10 - Number portability (%)

	Feb 06	Dec 06
Use this service	2.2	4.7
Do not use this service	57.7	47.1
Not aware of this service	40.1	48.2
Total	**100**	**100**

Source: Electronic Communications Consumer Survey – February and December 2006.

16. Those customers who have never switched mobile operator give as the reasons for this the fact that they are **satisfied with current operator** (79.4 per cent, 13.2 per cent more than in February 2006), and/or the fact that **"*most of my contacts are clients of current operator*"** (30.6 per cent).

Table 11 – Reasons for not switching mobile operator (%)

	Feb 06	Dec 06
Satisfied with current operator	66.2	79.4
Most of my contacts are clients of current operator	31.2	30.6
Current operator has best prices	6.6	10.6
Process of changing operator is too complicated/inertia	3.2	3.0
Decision of other person	2.8	2.8
Good network coverage	0.8	0.6
Blocked handset / contract does not permit		0.6
With 2 / 3 operators		0.3
Keep the same number	0.4	0.3
Other responses	4.0	1.2
Don't know / Didn't respond	2.3	1.2

Source: Electronic Communications Consumer Survey – February and December 2006
Note: Multiple responses.

3G Services

17. In December 2006, **22 per cent of mobile phone users said that they had 3G apparatus,** an increase of 6 per cent over February 2006. These users correspond to an effective penetration rate of 16.7 per cent of the Portuguese population.

18. The percentage of customers with 3G apparatus who **access the internet doubled**[1], reaching 24.9 per cent.

MMS remains the most used service with 47 percent of responses.

Table 12 – Services used with 3G mobile phone (%)

	Feb 06	Dec 06
MMS	63.9	47.0
Access internet	12.8	24.9
Video calls	26.6	21.7
Download ring tones and images	35.3	19.7
MMS Albums	11.5	14.7
E-mail, Messenger or chat	14.1	12.9
On line games	11.7	12.3
Video service	9.7	10.6
Don't know / Didn't respond	0.5	0.4
None of the above	22.7	31.7

Source: Electronic Communications Consumer Survey – February and December 2006
Note: Multiple responses.

[1] Excluded who access internet with 3G card connected directly to a PC.

Mobile telephone service tariff monitor

19. The **tariff monitor on the website of ICP-ANACOM has been used by 3.0 per cent of mobile service customers.**

80.5 per cent of respondents said they did not know of the tariff monitor.

Table 13 – Awareness of Tariff Monitor (%)

	Dec 06
Already used	3.0
Aware but never used	16.5
Unaware of tariff monitor	80.5
Total	**100**

Source: Electronic Communications Consumer Survey – December 2006

Television service

20. In December 2006, **43.3 per cent of households had subscription television services.**

21. According to the survey, **TV Cabo is the most used operator of this service** (76.1 per cent)**.**

Cabovisão is the second largest operator (16.1 per cent).

Table 14 – Subscription television operator (%)

	Dec 06
TV Cabo Portugal	76.1
Cabovisão	16.1
TVTel	2.9
Cabo TV Açoriana	2.0
Cabo TV Madeirense	1.7
Pluricanal	0.8
Bragatel	0.2
Clix	0.1
Total	**100**

Source: Electronic Communications Consumer Survey – December 2006

NOTE ON METHODOLOGY:

Electronic Communications Consumer Survey: December 2006

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 sample was selected by quota of sex, age and education and occupation, structured by region and residence. In total 2,519 interviews were carried out. Of there 2,519 interviews, 997 were done by mobile phone and 1522 by fixed-line. In the cases of Table 1, point 2 and Table 3, a 3.1% margin of error is ensured. In Table 7 a 2.5% margin of error is ensured. In the remaining tables the margin of error is approximately 1.95%.

The results were adjusted for the total target population and households according to the weighting calculations of MARKTEST and based on the 2001 Census of INE. For fixed-line services a weighting was applied that is representative of the totality of Portuguese households based on the social-demographic characteristics of the survey. For mobile services a weighting was applied to be representative of the Portuguese population of over 15 years of age and resident in Portugal, based on the social-demographic characteristics of the survey.

The fieldwork and processing of the information was performed MARKTEST between 9 November and 29 December 2006.

Electronic Communications Consumer Survey: February 2006

The population targeted by this survey were individuals of either sex, aged 15 or over, resident in Continental Portugal and the Autonomous regions of Madeira and The Azores. The sample was selected by quota of sex, age and education and occupation, structured by region and residence. In total 2,020 face to face interviews were carried out, ensuring a maximum margin of error of 2.18% for the main findings. The results were adjusted to the total of individuals and households based on the weighting calculations of MARKTEST and based on the 2001 Census of INE. For fixed-line services a weighting was applied that is representative of the totality of Portuguese households based on the social-demographic characteristics of the survey. For mobile services a weighting was applied to be representative of the Portuguese population of over 15 years of age and resident in Portugal, based on the social-demographic characteristics of the survey.

The fieldwork and processing of the information was performed MARKTEST between 17 January and 22 February 2006.