

## Mobile Phones - Ireland - June 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“Data allowance is the most important factor when choosing a phone plan. This reflects the significant increase in mobile data usage in recent years as use of data heavy streaming services on mobile devices grows. Mobile operators could therefore offer greater flexibility within their contracts to enable consumers to modify data allowances to reflect changes in their usage.”

– **James Wilson, Research Analyst**

This report looks at the following areas:

- **Smartphone ownership remains at peak levels**
- **Consumers opting for pay monthly services**
- **Data usage continues to grow**
- **Mobile operators stepping up 5G preparations**

Ownership of smartphone devices remains at peak levels across the island of Ireland, indicating that the Irish mobile phone sector is a mature market. The market continues to be dominated by Samsung, Apple's iPhone and the Android and iOS operating systems, making it difficult for other manufacturers and operating systems to grow.

Irish consumers express satisfaction with the coverage and customer service levels of their mobile network, which helps to explain why few consumers switched providers in the last 12 months. Irish consumers would however consider switching to a mobile provider that offers free data that can be used with certain apps and services. As such, zero-rating popular services or enabling consumers to modify data allowances to better reflect their usage could help encourage them to change providers.

**BUY THIS  
REPORT NOW**

**VISIT:**  
[store.mintel.com](https://store.mintel.com)

**CALL:**  
EMEA  
+44 (0) 20 7606 4533

Brazil  
0800 095 9094

Americas  
+1 (312) 943 5250

China  
+86 (21) 6032 7300

APAC  
+61 (0) 2 8284 8100

**EMAIL:**  
[reports@mintel.com](mailto:reports@mintel.com)

### DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

# Mobile Phones - Ireland - June 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Table of Contents

### Overview

What you need to know  
Issues covered in this Report

### Executive Summary

The market  
Figure 1: Total number of mobile phone subscribers, NI and RoI, 2014-19

Forecast  
Figure 2: Indexed number of mobile phone subscribers, NI and RoI, 2014-24

Market factors  
Smartphone ownership remains at peak levels  
Consumers opting for pay monthly services  
Data usage continues to grow  
Mobile operators stepping up 5G preparations  
Companies, brands and innovations

The consumer  
Irish mobile phone market dominated by Apple and Samsung  
Figure 3: Manufacturer of smartphone owned, NI and RoI, March 2019  
Figure 4: Operating system consumers use on their smartphone, NI and RoI, March 2019

O2 the leading provider in NI, Three and Vodafone in RoI  
Figure 5: Mobile network providers used by consumers for their main mobile phone, NI, March 2019  
Figure 6: Mobile network providers used by consumers for their main mobile phone, RoI, March 2019

Contracts the main payment plan used by Irish consumers  
Figure 7: Type of mobile network connection, NI and RoI, March 2019

Majority of consumers do not switch mobile network provider  
Figure 8: Switched mobile network provider in the last 12 months, NI and RoI, March 2019

Satisfaction with mobile phone coverage high among Irish consumers  
Figure 9: Agreement with statements related to mobile phones, NI and RoI, March 2019

What we think

### The Market – What You Need to Know

Subdued growth in RoI mobile phone market  
Smartphone ownership high  
Contracts the main type of mobile payment plan  
Data usage grows across the UK/NI and RoI

### Market Size and Forecast

Mobile phone subscriptions to see slow growth in 2019  
Figure 10: Total number of mobile phone subscribers, IoI, NI and RoI, 2014-24

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](https://store.mintel.com)  
**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
Americas +1 (312) 943 5250 | China +86 (21) 6032 7300  
APAC +61 (0) 2 8284 8100 |  
**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Mobile Phones - Ireland - June 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Mobile phone subscriptions to growing through to 2024

Figure 11: Indexed number of mobile phone subscribers, NI and RoI, 2014-24

## Contracts remain popular among consumers

Figure 12: Mobile subscriptions, by prepay and post-pay, RoI, 2014-18

Figure 13: Percentage of customers on pre- or post-pay, by operator, RoI, 2018

## Consumers see cost of phone contracts increase

Figure 14: Monthly average revenue per user, by prepay and post-pay, RoI, 2014-18

## Marginal growth in value of mobile market expected in 2019

Figure 15: Total value of the mobile communications market, RoI, 2014-24

## Voice communications driving revenue growth in mobile market

Figure 16: Annualised mobile retail revenues, RoI, 2014-18

## Mobile voice traffic flat in 2018, landline minutes decline

Figure 17: Total voice traffic, RoI, 2014-18

Figure 18: Proportion of voice traffic via mobile and fixed channels, RoI, 2014 and 2018

## Market Drivers

### Ownership of smartphones remains high

Figure 19: Ownership of, or access to, mobile technology devices, NI and RoI, March 2019

### NI consumers satisfied with mobile phone reception

Figure 20: Satisfaction with reception of mobile service, UK and NI, 2019

### Service performance the leading complaint for UK/NI mobile users

Figure 21: Reasons consumers make a complaint about mobile phones, UK (including NI), 2018

### Strong growth in mobile data usage continues in 2018

Figure 22: Average monthly data usage, UK (including NI), 2014-18

Figure 23: Average mobile data usage, RoI, 2013-18

### UK/NI and RoI consumers benefit from competitive mobile data costs

Figure 24: Cost of 1GB of mobile data in selected European Union countries, 2018

### Smartphones a key channel for online shopping

Figure 25: Usage of smartphones to shop online in the last three months, NI and RoI, December 2018

### Vodafone Ireland launched first 5G trial

## Companies and Brands – What You Need to Know

Camera quality of new handsets evolving

Three UK commits to frictionless data usage

Sky and Tesco Mobile using main businesses to reward mobile customers

## Who's Innovating?

First 5G-enabled phones preparing to enter the market

Foldable handsets ready for launch

Handsets incorporating more rear lenses to improve picture quality

Wireless charging is now built-in handset technology

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](https://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Mobile Phones - Ireland - June 2019

**Report Price:** £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Competitive Strategies – Key Players

BT Group (BT, EE, Open Reach)

BT Mobile

Key facts

Products and services

Recent developments

EE (Everything Everywhere)

Key facts

Products and services

Recent developments

CK Hutchison Holdings (Three)

Key facts

Products and services

Recent developments

Eir Group

Key facts

Products and services

Recent developments

Post Mobile

Key facts

Products and services

Sky Plc

Key facts

Products and services

Recent developments

Telefónica (O2)

Key facts

Products and services

Recent developments

Tesco Mobile

Key facts

Products and services

Recent developments

Vodafone

Key facts

Products and services

Recent developments

## The Consumer – What You Need to Know

Android and iOS the main operating systems used

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](https://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Mobile Phones - Ireland - June 2019

Report Price: £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

NI mobile market dominated by O2, Three and Vodafone in RoI  
Irish consumers favour mobile phone contracts  
Satisfaction with mobile services high among Irish consumers

## Manufacturer and Operating System Used

Apple and Samsung the leading smartphone brands in Ireland  
Figure 26: Manufacturer of smartphone owned, NI and RoI, March 2019

iPhone popular among young consumers  
Figure 27: Ownership of an Apple or Samsung smartphone (eg iPhone), by age, NI, March 2019  
Figure 28: Ownership of an Apple smartphone (eg iPhone), by age, RoI, March 2019

Android dominates operating system usage  
Figure 29: Operating system consumers use on their smartphone, NI and RoI, March 2019

Android popular among C2DEFs  
Figure 30: Use of Android operating system on smartphones, by social class, NI and RoI, March 2019  
Figure 31: Use of iOS operating system on smartphones, by social class, NI and RoI, March 2019

## Mobile Network Provider Used

O2 the main mobile network in NI  
Figure 32: Mobile network providers used by consumers for their main mobile phone, NI, March 2019

Millennials are key O2 users  
Figure 33: Consumers using O2 as the mobile network provider for their main mobile phone, by generation, March 2019

Three and Vodafone dominate RoI mobile market  
Figure 34: Mobile network providers used by consumers for their main mobile phone, RoI, March 2019

Urban rural divide in mobile network usage  
Figure 35: Top four mobile network providers used by consumers for their main mobile phone, by region, RoI, March 2019

## Type of Mobile Network Connection

Post-paid services remain popular among Irish consumers  
Figure 36: Type of mobile network connection, NI and RoI, March 2019

Mobile connection type is linked to household income  
Figure 37: Consumers' use of pay-as-you-go and contract services with their phone, by income, NI, March 2019  
Figure 38: Consumers' use of pay-as-you-go and contract services with their phone, by income, RoI, March 2019

## Switching Mobile Network Provider

Irish consumers staying with current network provider  
Figure 39: Switched mobile network provider in the last 12 months, NI and RoI, March 2019

16-34-year-olds most likely to switch providers  
Figure 40: Consumers who have switched mobile network provider in the last 12 months, by age, NI and RoI, March 2019

Switching mobile networks lowest in rural areas  
Figure 41: Consumers who have not switched mobile network provider in the last 12 months, by location, NI, March 2019  
Figure 42: Consumers who have not switched mobile network provider in the last 12 months, by location, RoI, March 2019

## Attitudes towards Mobile Phones

BUY THIS  
REPORT NOW

**VISIT:** [store.mintel.com](https://store.mintel.com)  
**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094  
Americas +1 (312) 943 5250 | China +86 (21) 6032 7300  
APAC +61 (0) 2 8284 8100 |  
**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)

# Mobile Phones - Ireland - June 2019

**Report Price:** £1995.00 | \$2693.85 | €2245.17

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

## Irish consumers happy with mobile network coverage

Figure 43: Agreement with statements relating to mobile phones, NI and RoI, March 2019

## Urban consumers happiest with mobile network coverage

Figure 44: Agreement with the statement 'I find the coverage of my phone network to be good', by area, NI, March 2019

Figure 45: Agreement with the statement 'I find the coverage of my phone network to be good', by area, RoI, March 2019

## Wireless charging appeals to Millennials

Figure 46: Agreement with the statement 'I would be interested in getting a smartphone that can be charged wirelessly', by generation, NI and RoI, March 2019

## Damaged smartphone devices highest among Millennials

Figure 47: Agreement with statements relating to mobile phones, by age, NI, March 2019

Figure 48: Agreement with statements relating to mobile phones, by age, RoI, March 2019

## Appendix – Data Sources, Abbreviations and Supporting Information

Data sources

Generational cohort definitions

Abbreviations

**BUY THIS  
REPORT NOW**

**VISIT:** [store.mintel.com](https://store.mintel.com)

**CALL:** EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

**EMAIL:** [reports@mintel.com](mailto:reports@mintel.com)