

Demand side data: The CNMC Household Panel

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Rationale for demand side data

Why do we need demand side data?

- 1) Better knowledge of the consumer's point of view
- 2) Lack of information from the supply side (from telecom operators)
- 3) To check the data provided by the telecom operators

Rationale for demand side data

So, how to get information from consumers?

- 1) Contacting consumer advocacy organizations
- 2) Organizing focus groups (qualitative data)
- 3) Conducting surveys

Rationale for demand side data

What are the characteristics of a good survey?

- 1) It must be representative of our target population (avoid self-selection)
- 2) Enough sample size (at least, 1,000 individuals or households)
- 3) If the goal is tracking the results, it is better a longitudinal/panel approach than a cross-sectional one

The CNMC Household Panel: the methodology

How the CNMC addresses the collection of demand side data?

By means of the CNMC Household Panel: a rotating panel survey

The CNMC Household Panel: the methodology

The CNMC Households Panel survey is a longitudinal survey aimed at individuals aged 10 or over, residing in family homes throughout Spain.

Its aim is to gather information about the availability of services and equipments, consumption and spending patterns and also about habits and perceptions of residential consumers.

The information gathered spans several of the sectors supervised by the CNMC: energy (electricity and natural gas), telecommunication and audiovisual services and the postal sector.

The CNMC Household Panel: the methodology

The market research company Kantar carries out the fieldwork and data processing which feeds the survey: every six months, the households complete postal/web questionnaires regarding the availability of the services and their use and perceptions of them.

Moreover, and, every quarter, they send in bills for telecommunications services and every semester, they send in bills for electricity services.

This information, once processed, makes up the CNMC Households Panel Survey.

The CNMC Household Panel: the methodology

Survey characteristics (1/3):

Type of survey: longitudinal rotating panel ongoing with a periodicity of six months.

Survey method: postal (66.7% of households) and online (33.3% of households).

Universe: population residing in principal family homes. 18.5 million households and 42.0 million individuals aged 10 or over (Source: INE).

Geographical scope: the whole of Spanish territory, except Ceuta and Melilla.

The CNMC Household Panel: the methodology

Survey characteristics (2/3):

Field periods for the published results: the survey data are collected in the second and fourth quarters of the year. Telecommunications bills are collected in one month of each quarter of the year (March, June, September and December, approximately) and electricity bills are collected in one month of each semester of the year (June and December, approximately).

Sampling: multistage, proportional in size to the autonomous region and stratified in proportion to population size, social class and household size.

The CNMC Household Panel: the methodology

Survey characteristics (3/3):

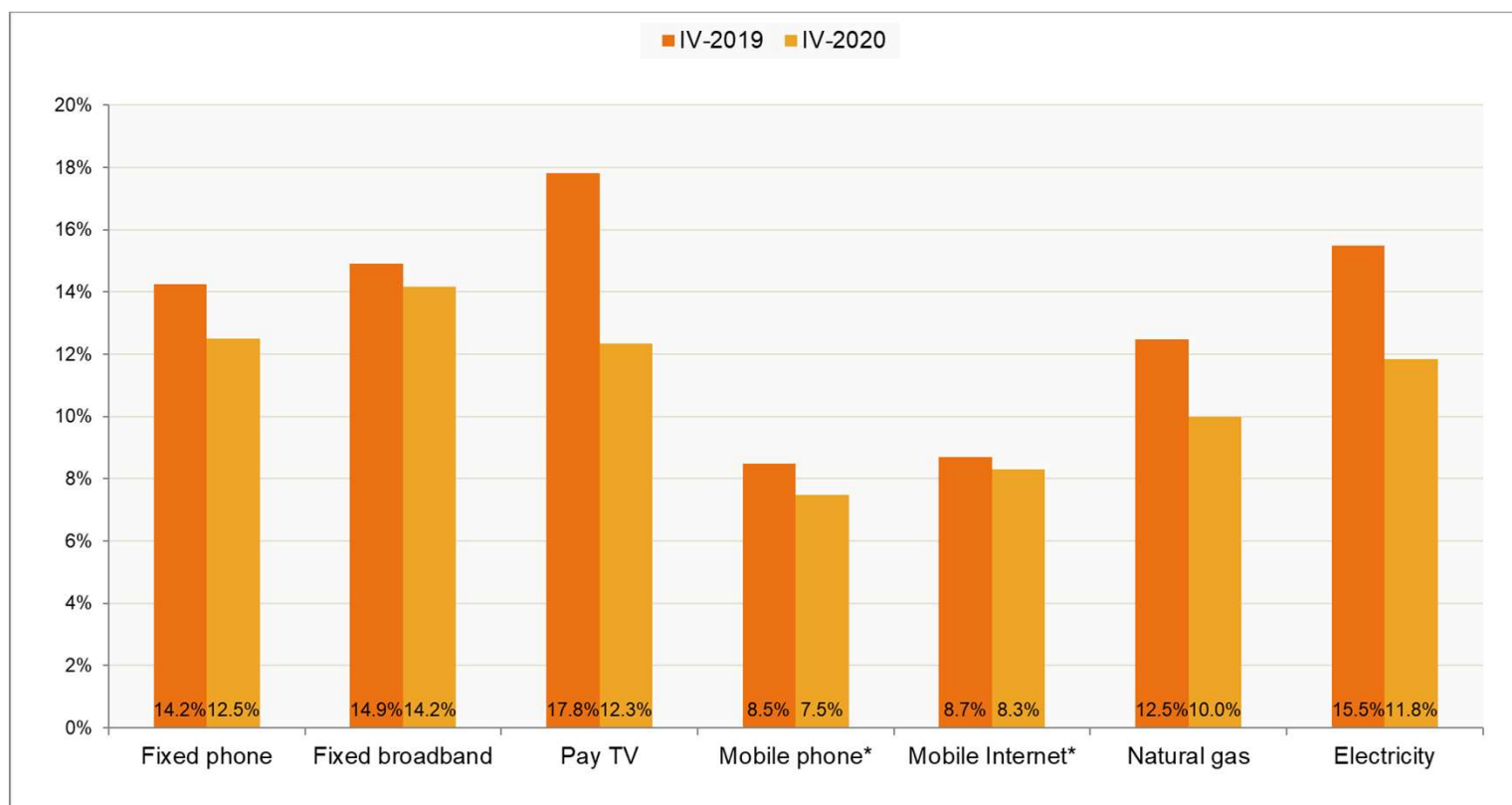
Sample size: roughly 4,500 households and 9,000 individuals aged 10 or over.

Margin of error: for the case of maximum uncertainty and a confidence level of 95%, the maximum sampling errors made in the national percentages for the questionnaires are approximately 1.5% for households and 1.0% for individuals.

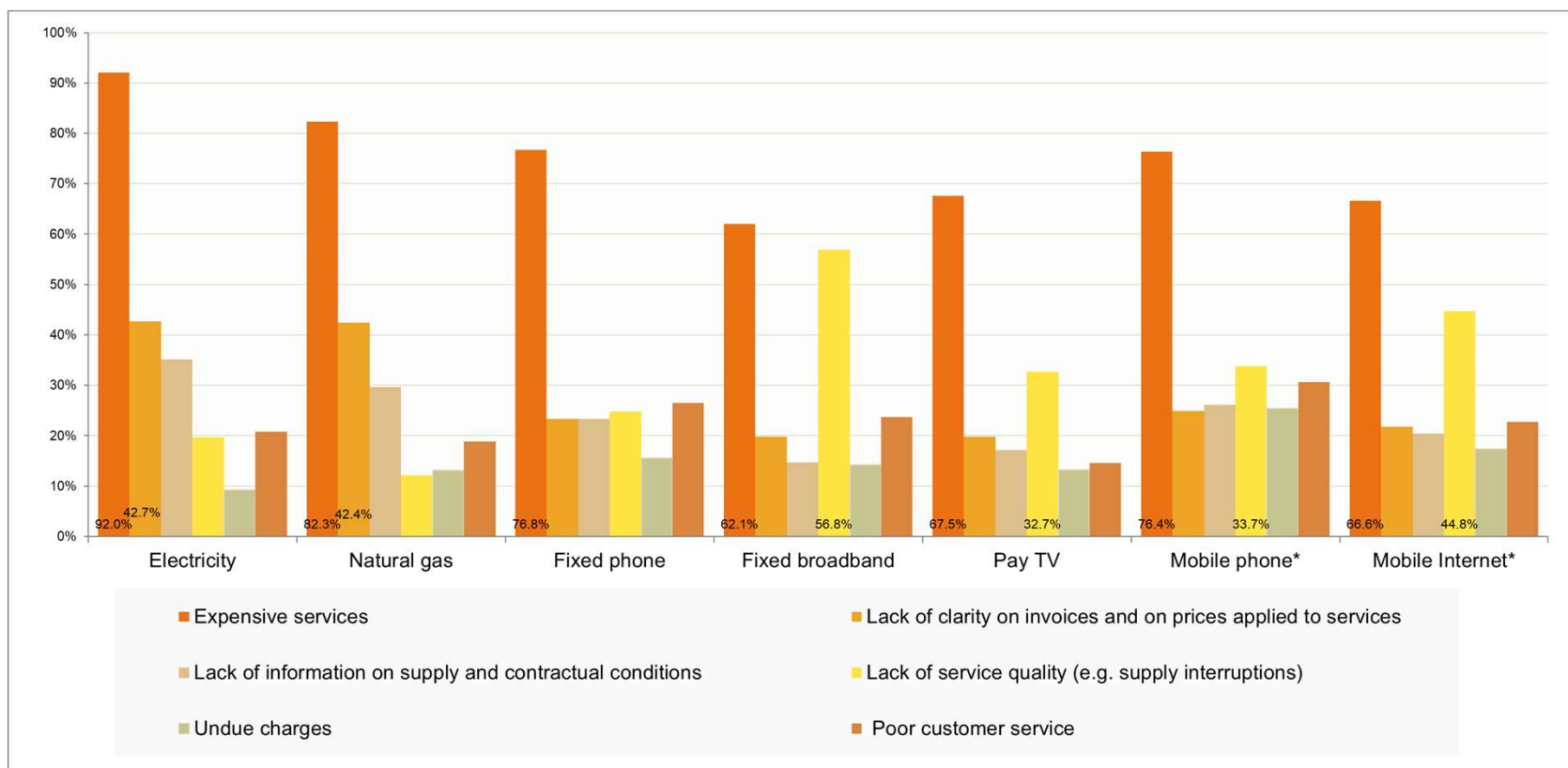
The CNMC Household Panel: the results

Let's look at examples of indicators obtained from household and individual survey questionnaires.

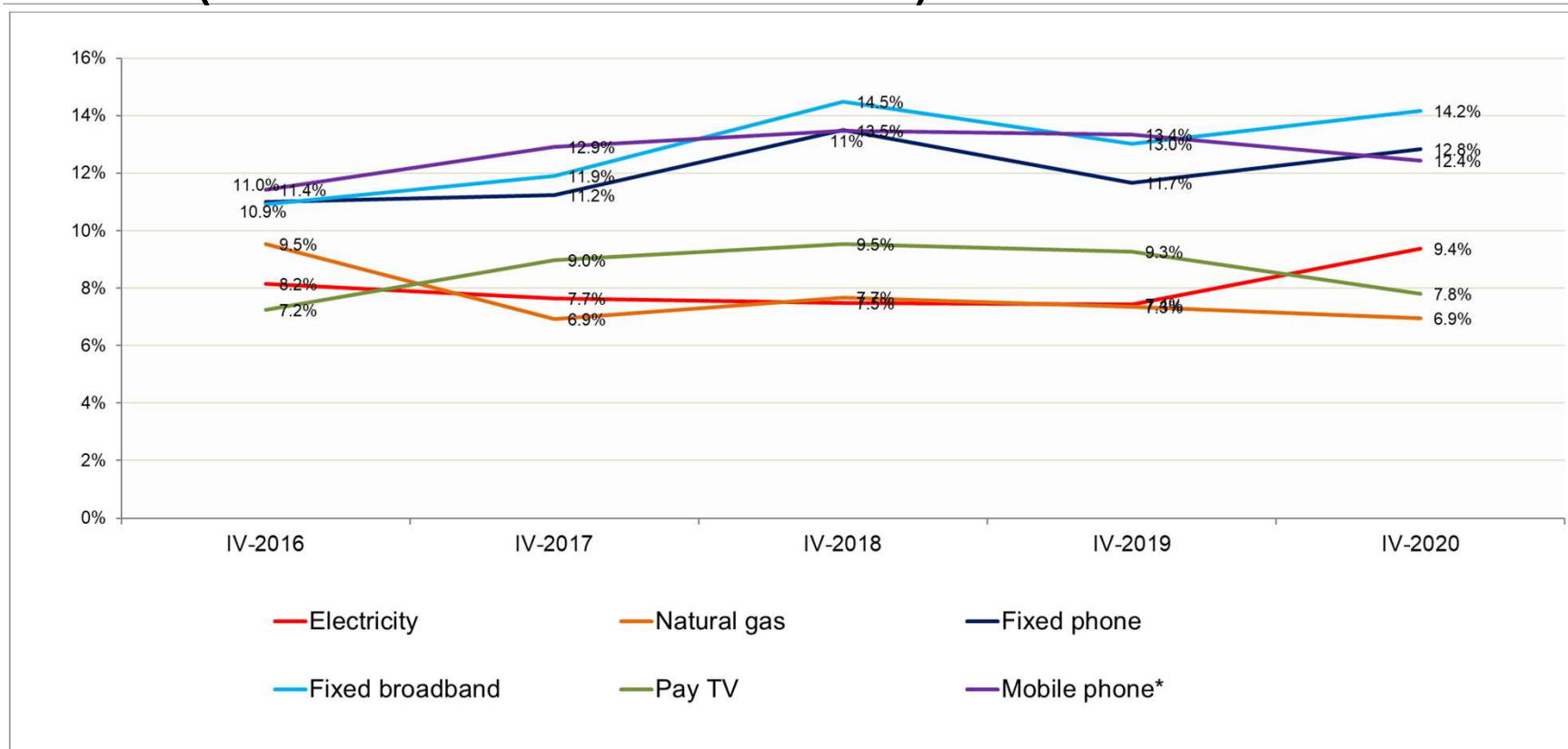
Households/individuals little or not at all satisfied with services



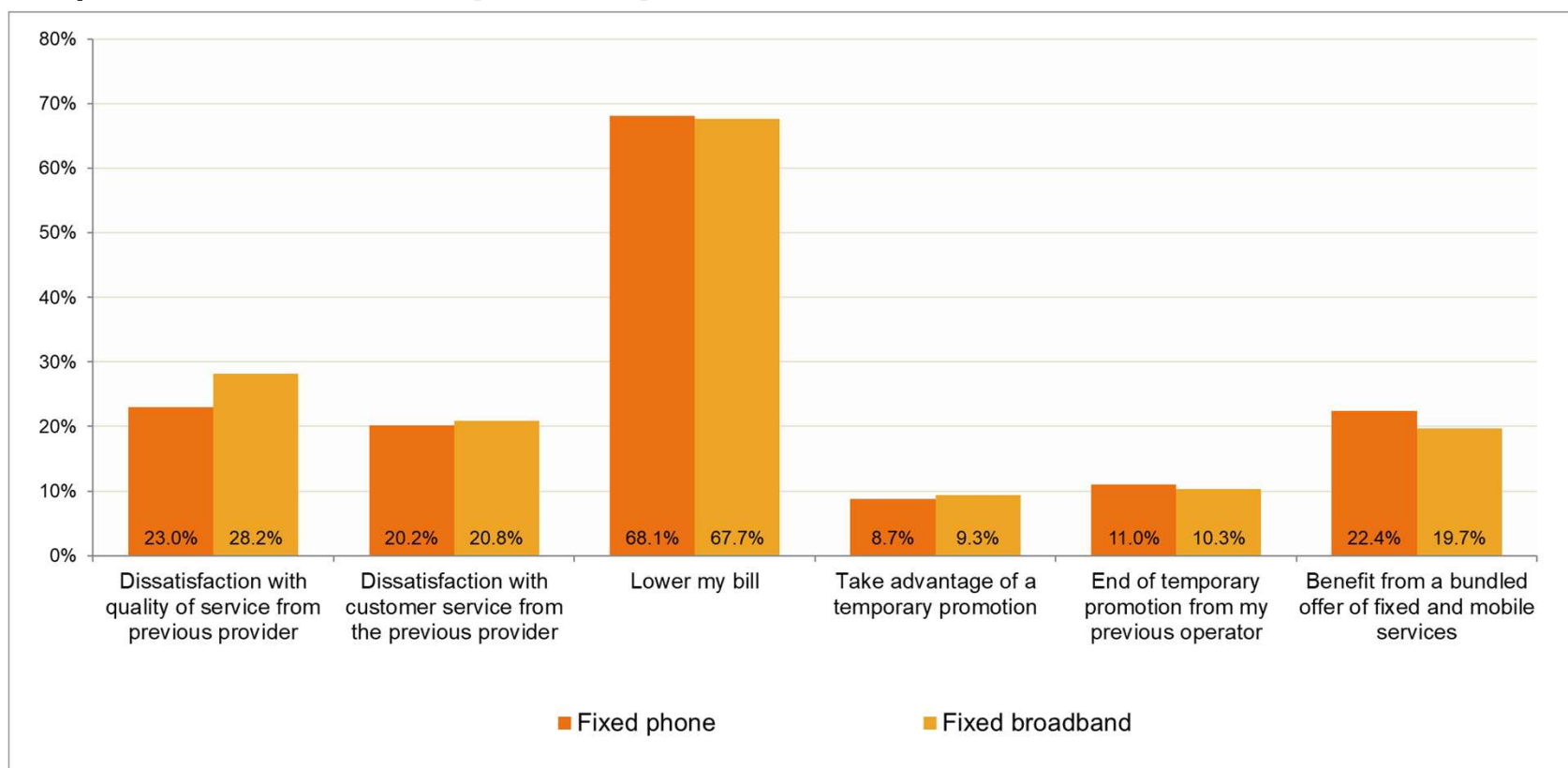
Main reasons for dissatisfaction with services (% of households / individuals, IV-2020). Possible multiple response



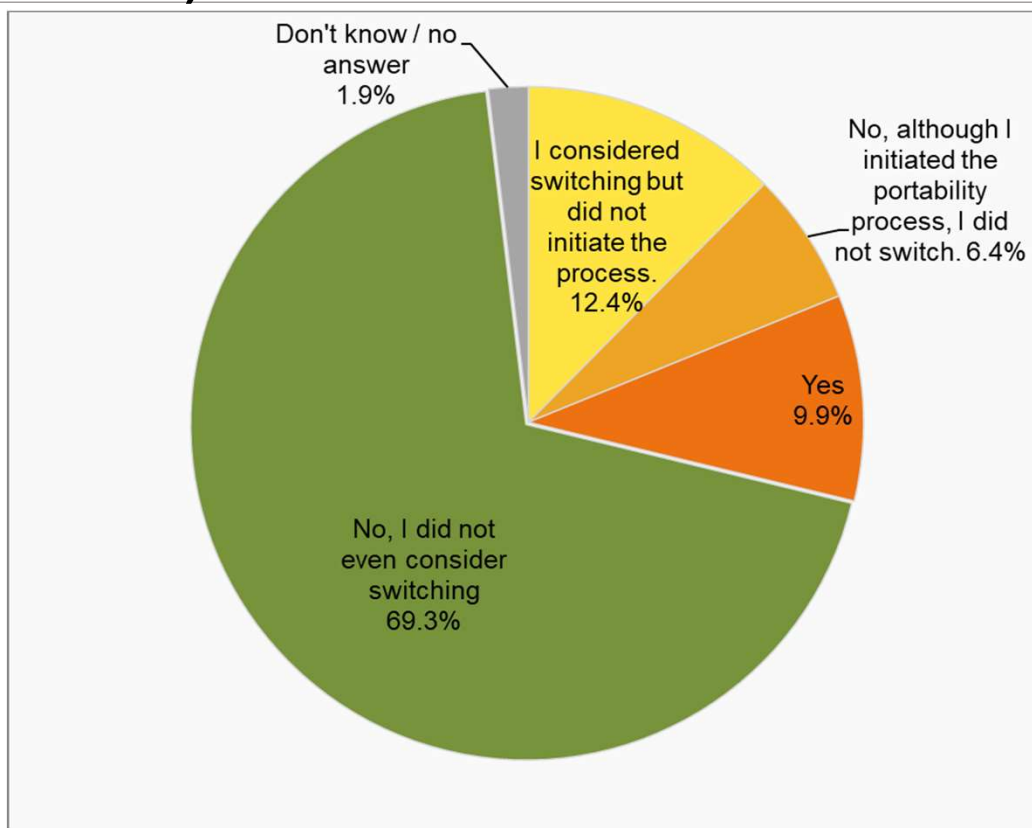
Households that have switched supplier in the last twelve months (% of households / individuals)



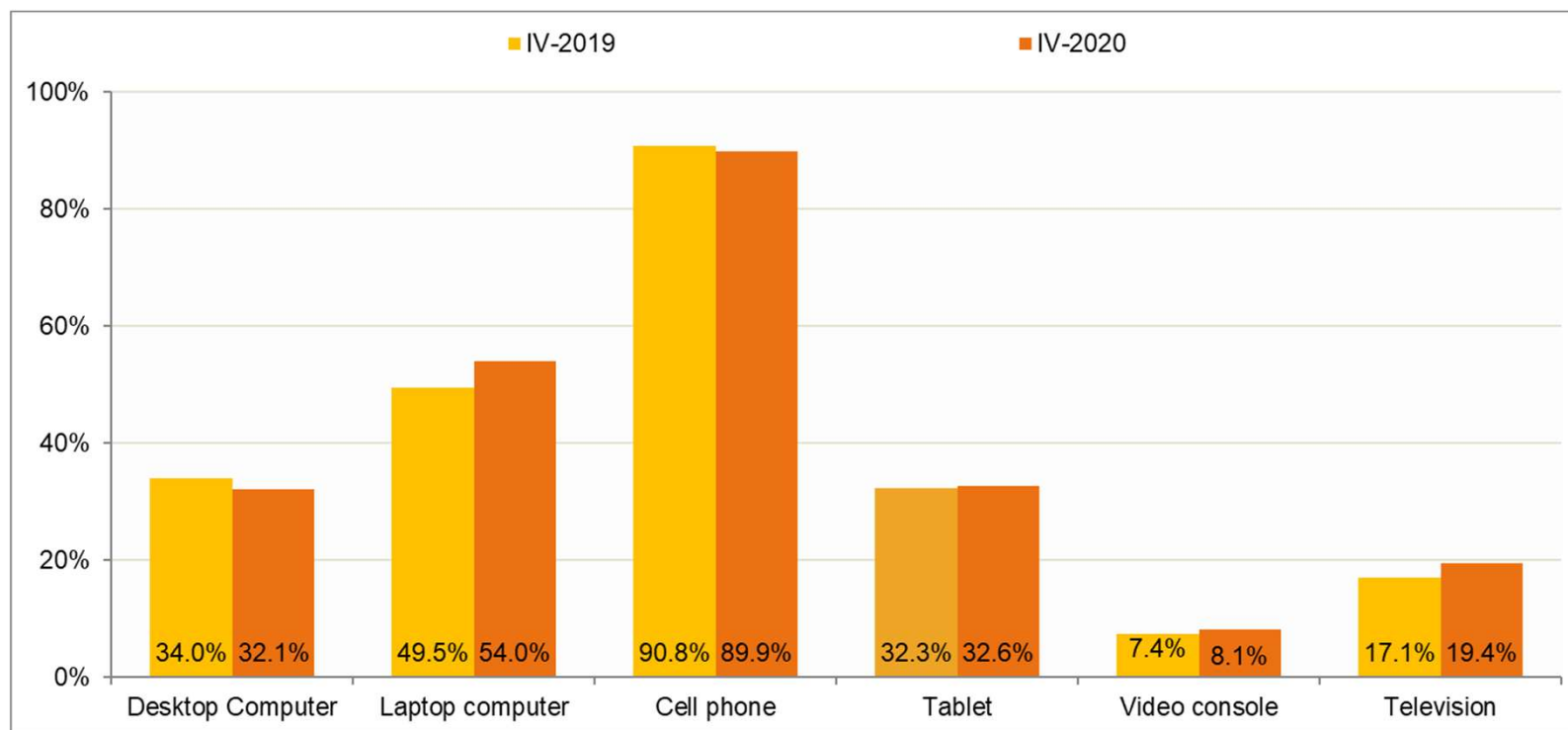
Reasons for switching telecom supplier (% of households, IV-2020). Possible multiple response



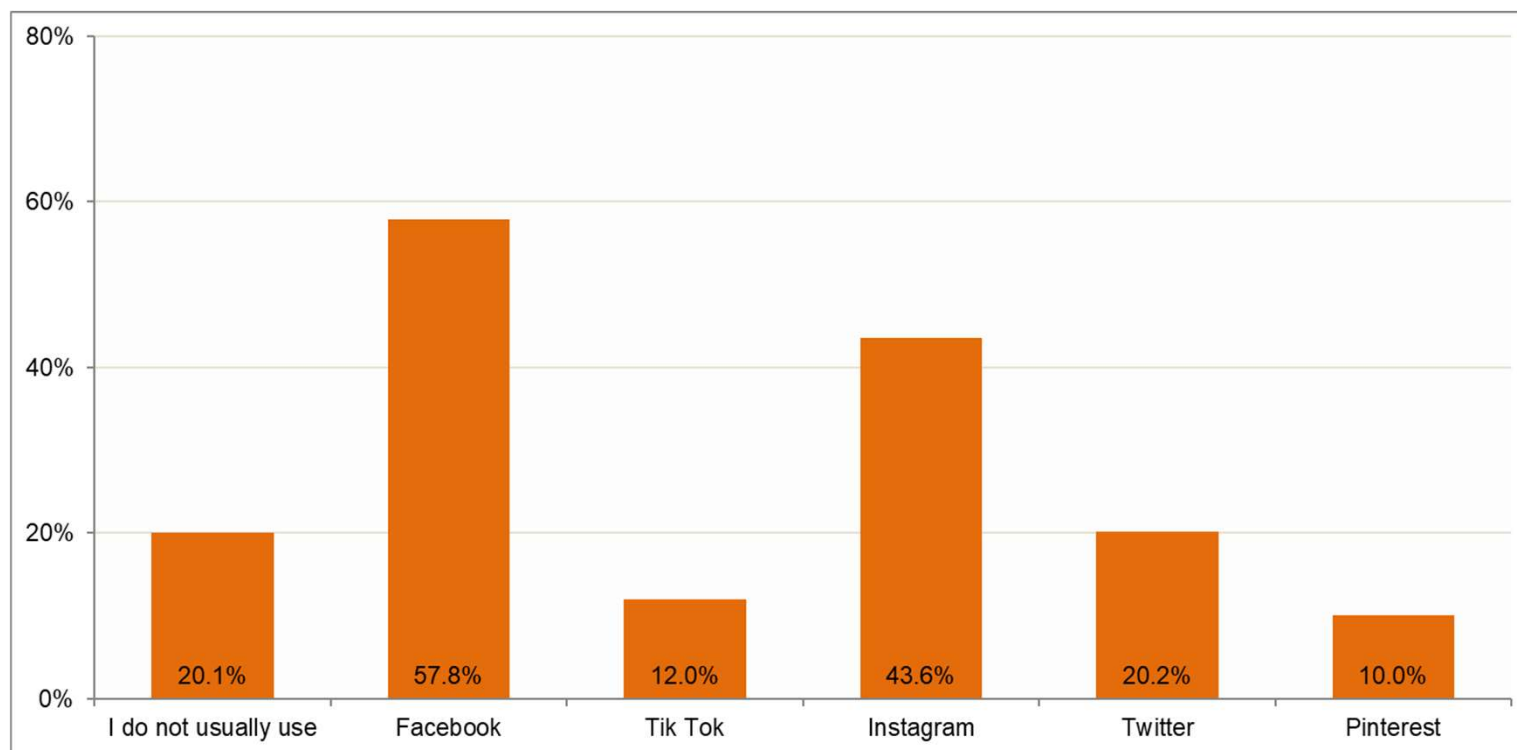
Individuals who have switched mobile phone provider in 2020 (% of individuals)



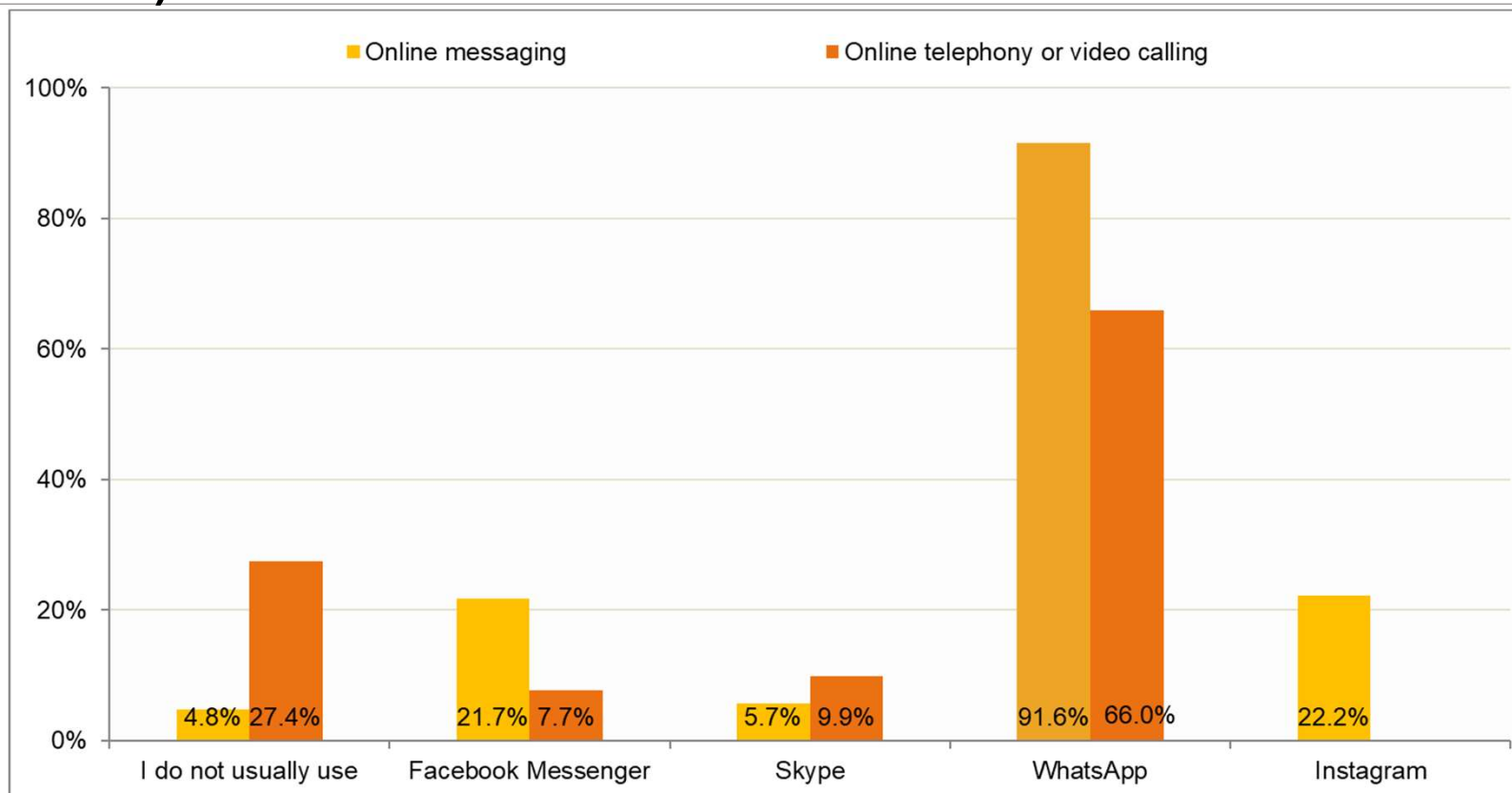
Devices with which the user usually connects to the Internet (% of individuals). Possible multiple response



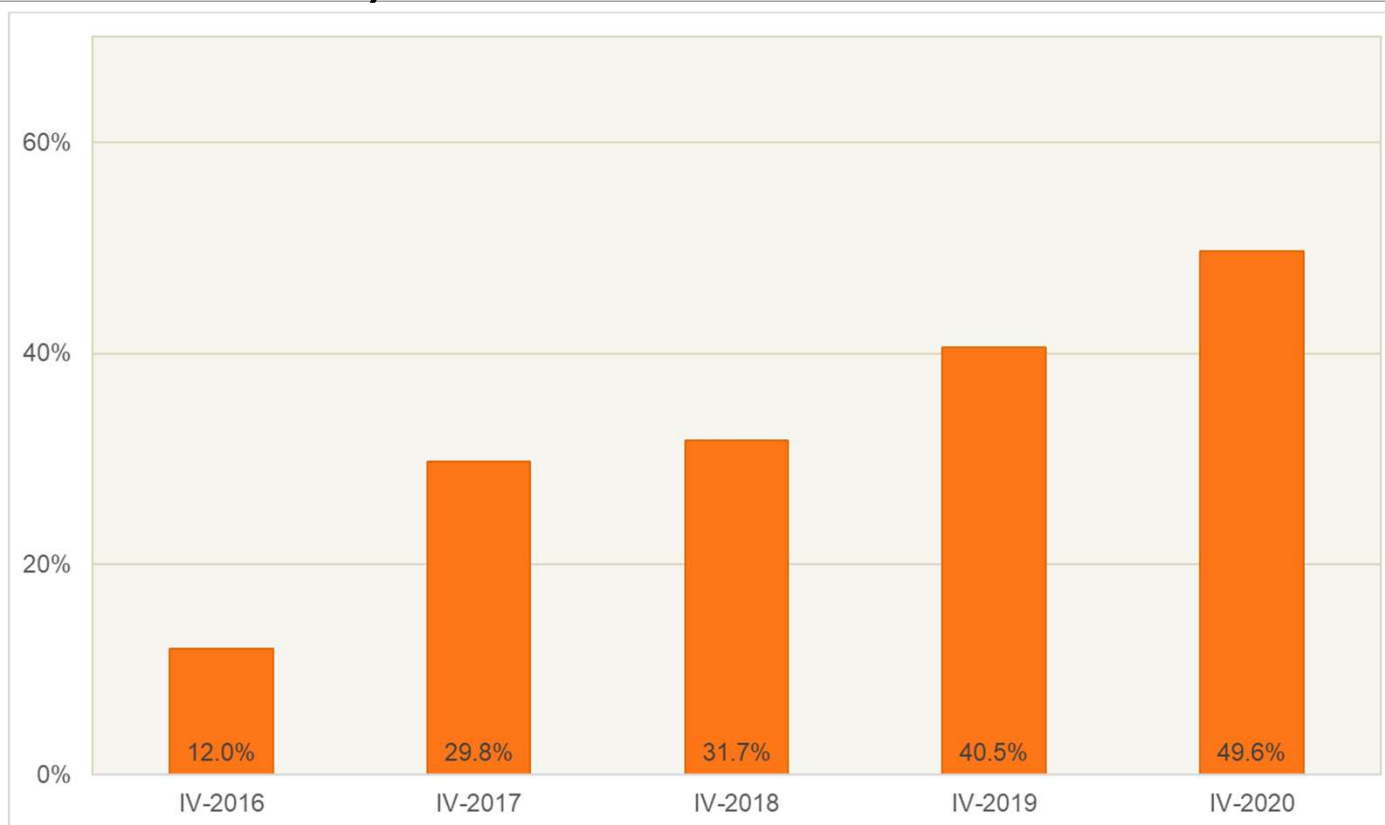
Social networks commonly used (% of individuals, IV-2020). Possible multiple response



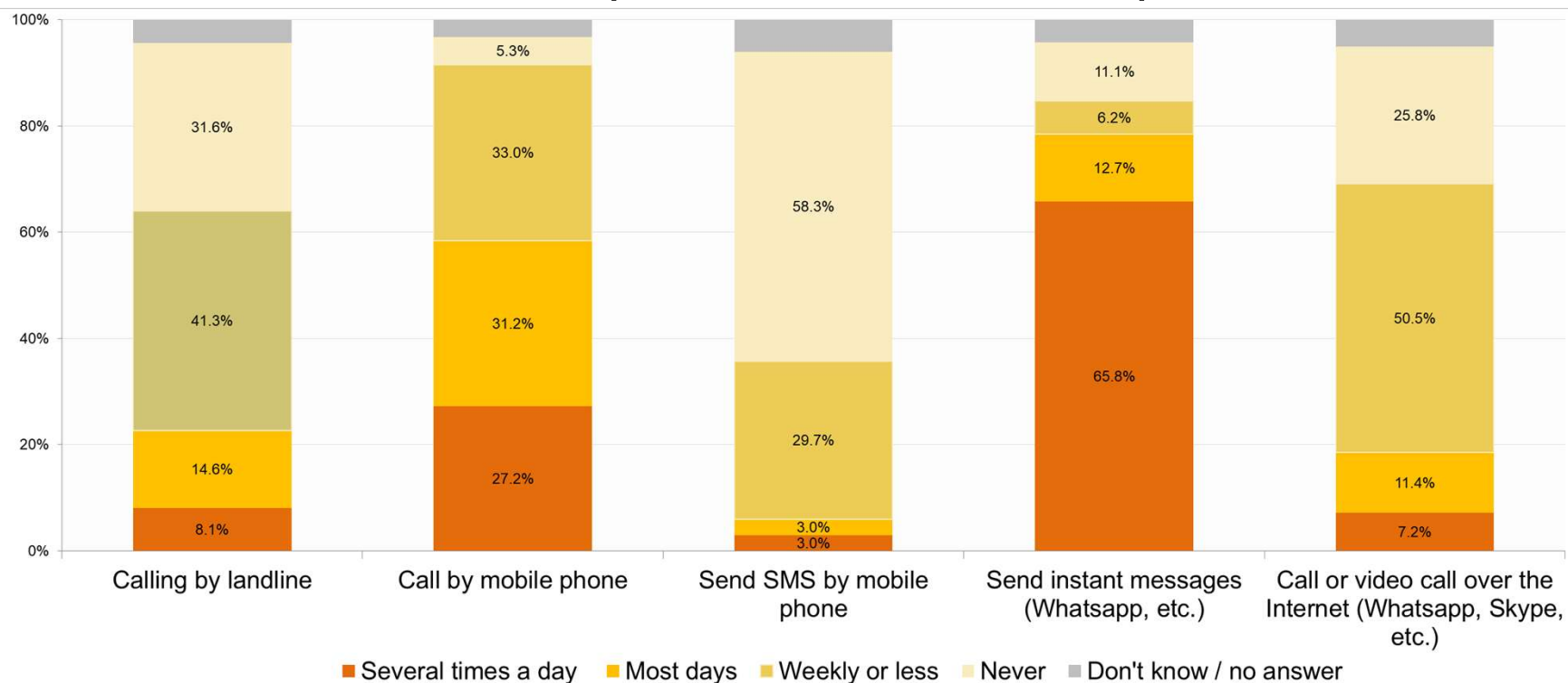
Commonly used online messaging services (% of individuals, IV-2020)



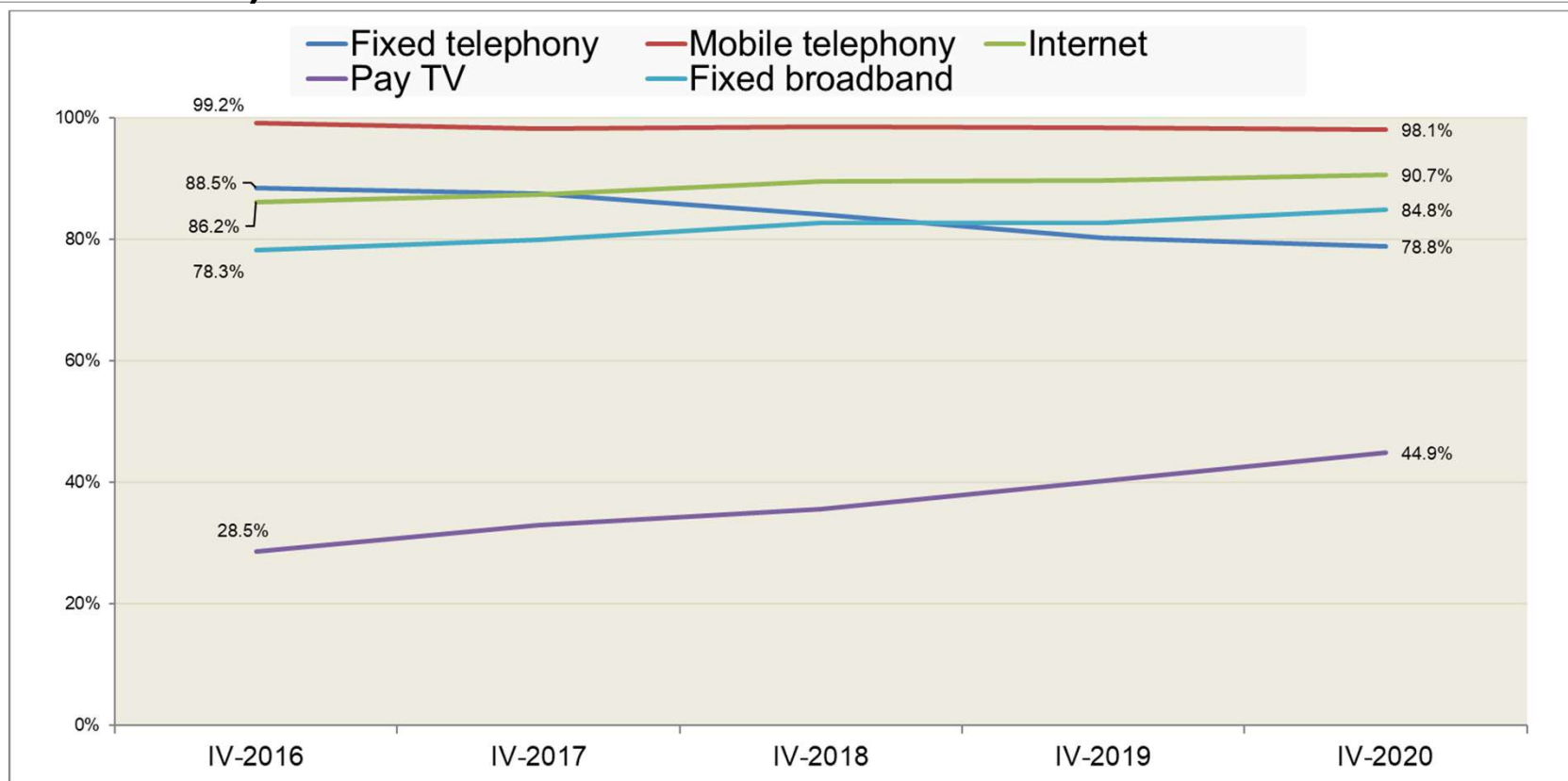
Use of paid OTT platforms to watch audiovisual content online (% of households)



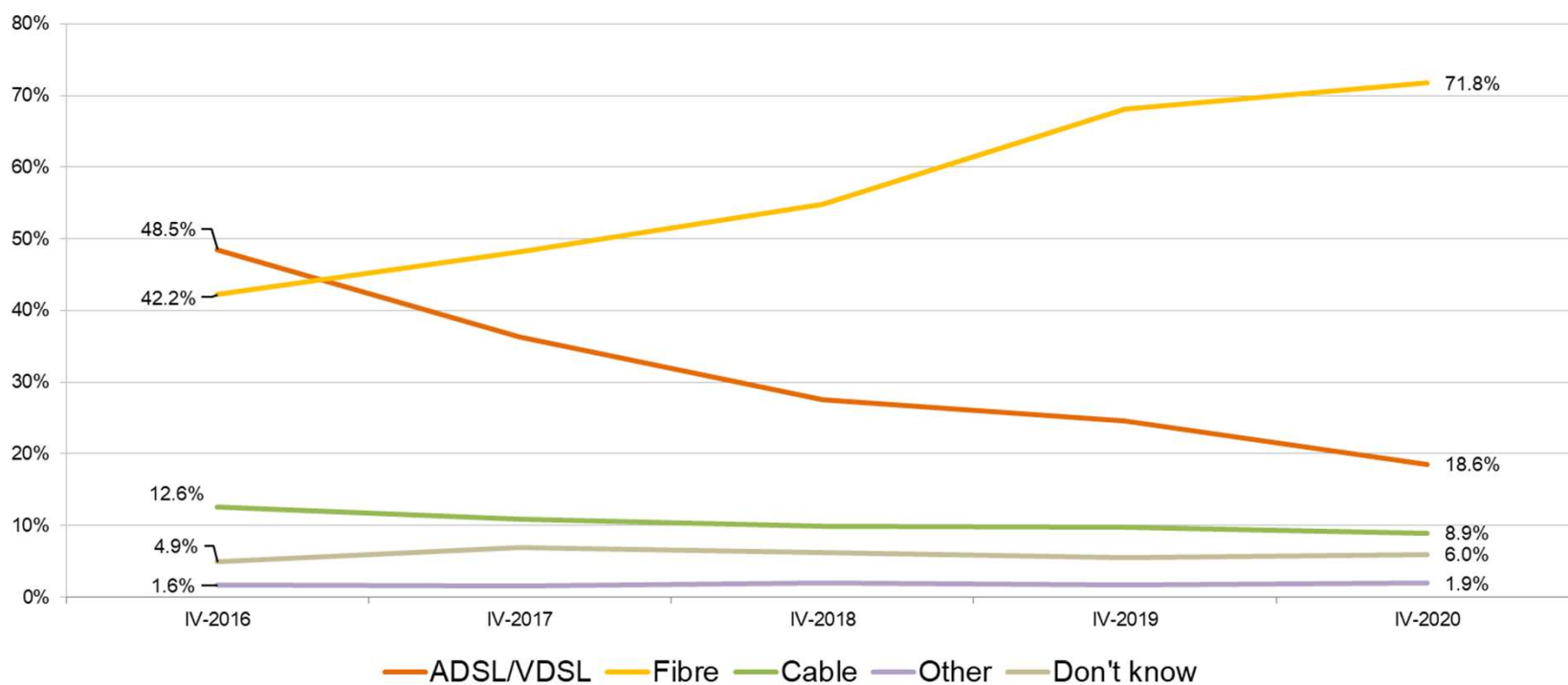
Frequency of use of calls and messages via traditional and OTT communication services (% individuals, IV-2020)



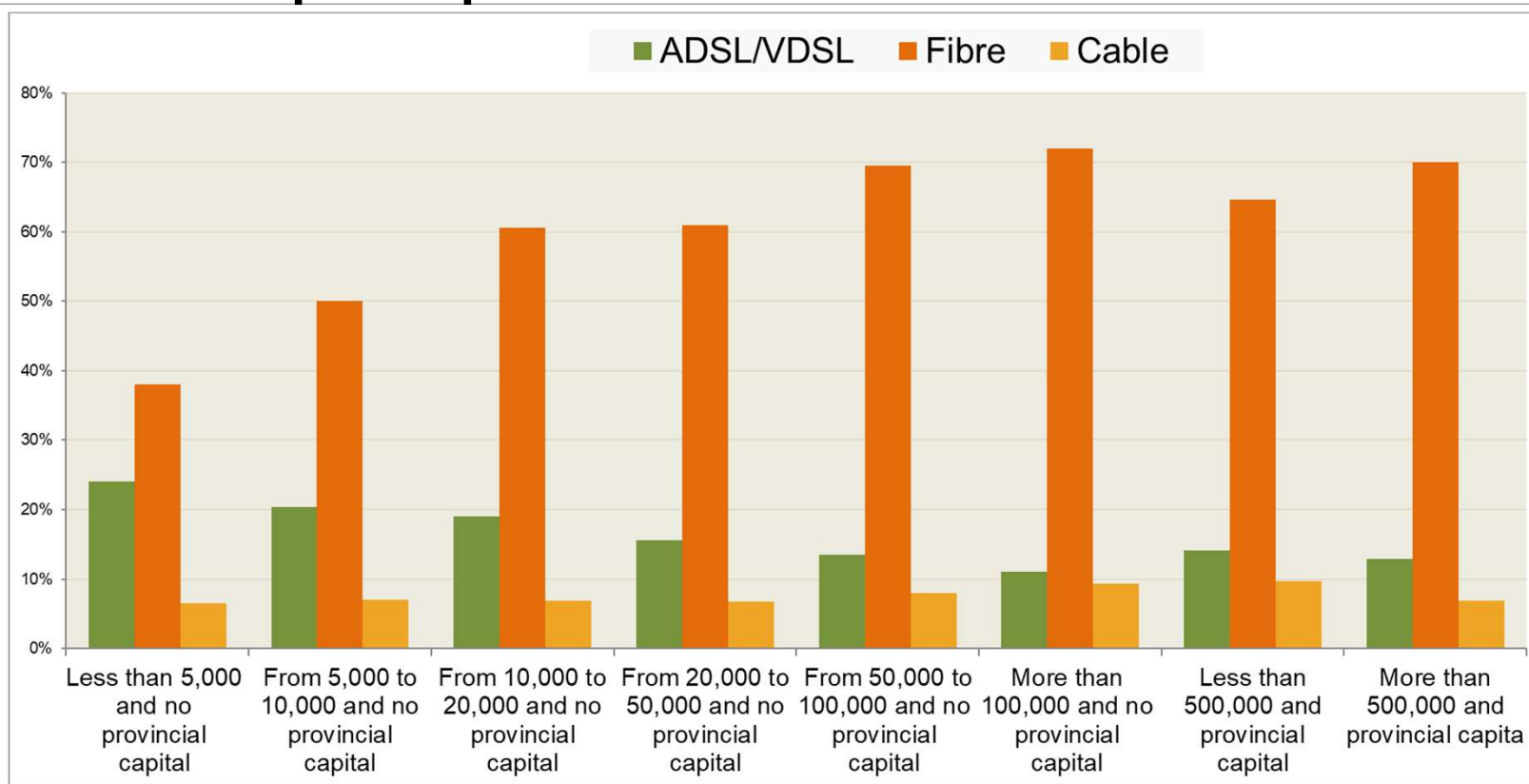
Availability of electronic communications services (% of households)



Types of fixed broadband (% of households). Possible multiple response.



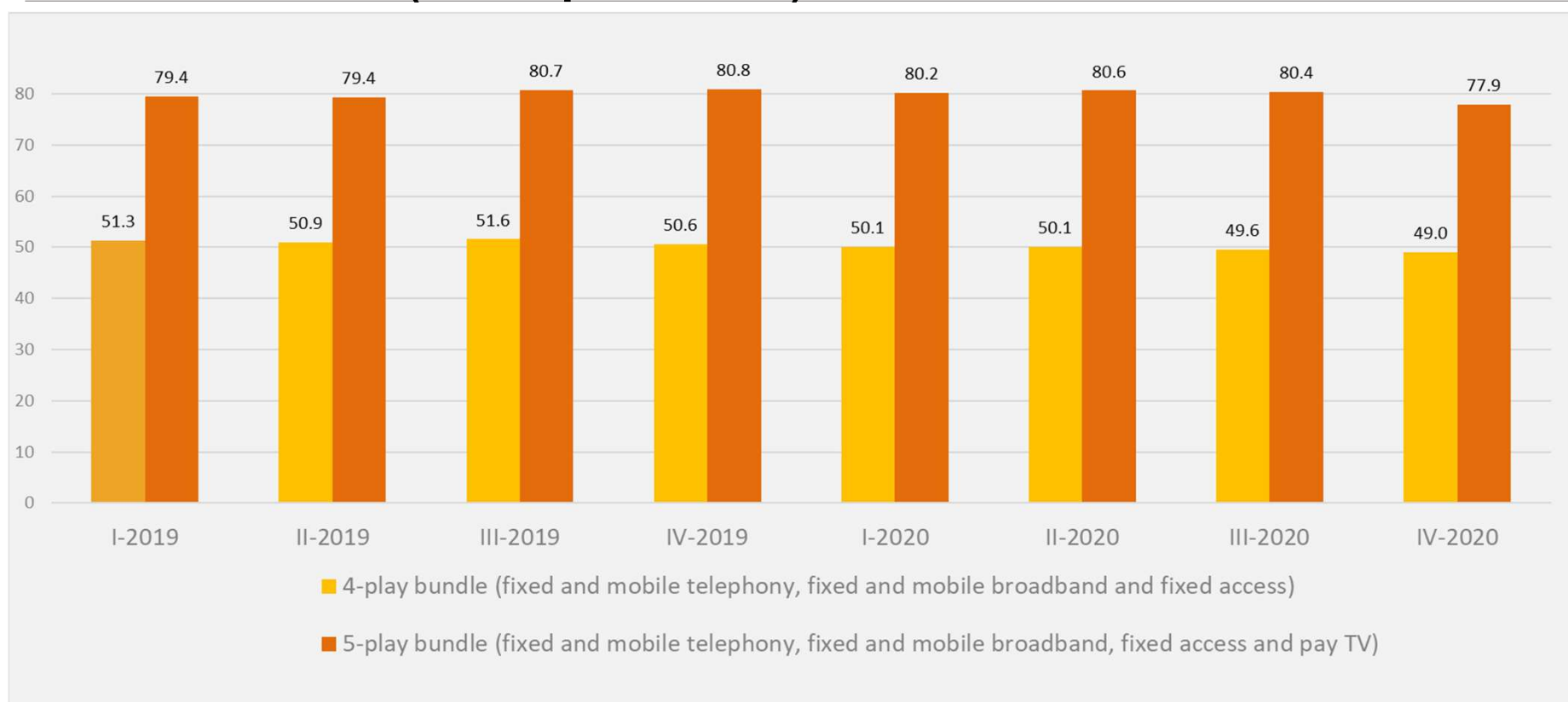
Types of fixed broadband by population size (% of households). Possible multiple response.



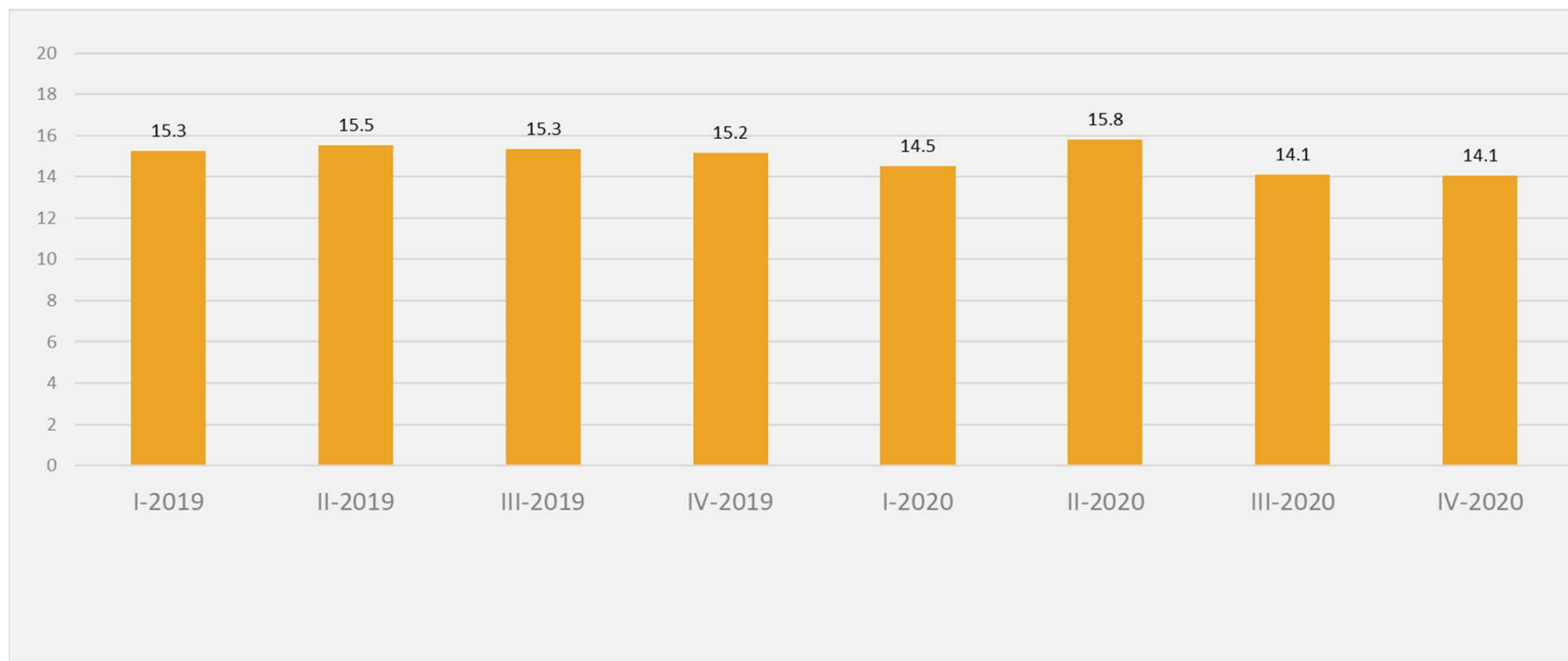
The CNMC Household Panel: the results

Now, let's look at examples of indicators obtained from the household and individual bills.

Mean expenditure per household on the most contracted telecom bundles (euros per month)



Mean expenditure per individual on mobile (euros per month)



Thank you!

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