ComReg - Residential Fixed Voice Research

Date: February 2020

Job Reference: 390019

Commission for Communications Regulation

REDC

Presentation Structure

1. Landline Ownership Details
2. Non Landline Users
3. Wider Telecommunications Ownership
4. Bundles
5. Service Providers
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12. Non Landline Owners
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Introduction

/ ComReg currently reviewing:

Fixed Access Call Origination ('FACO'); and
Retail Fixed Voice Access ('RFVA') markets .

/ RFVA last reviewed in 2014 (ComReg Decision D12/14).

/ FACO was last reviewed in 2015 (ComReg Decision D05/15) .

/ These were formerly Markets 1 and 2 of the 2007 EC Recommendation.

/ Neither market is listed in the 2014 Recommendation on markets susceptible to *ex ante* regulation.

/ Accordingly, each market is subject to the Three Criteria Test ('**3CT**') to determine whether it continues to be susceptible to ex ante regulation.

/ ComReg commissioned RED C to undertake detailed research among residential and business retail end users of fixed voice services.

Methodology

/ 2,011 face to face interviews were conducted door to door within the Republic of Ireland between October and December 2019.

/ Interviews were controlled by the following ComReg specified regions and data were subsequently weighted back to a nationally representative sample of the population.

Region	Number of Interviews Conducted	Weighted Representative Sample
<25 people per square km	730	424
>25 but <100 people per square km	772	535
Population >100 per square km	509	1052

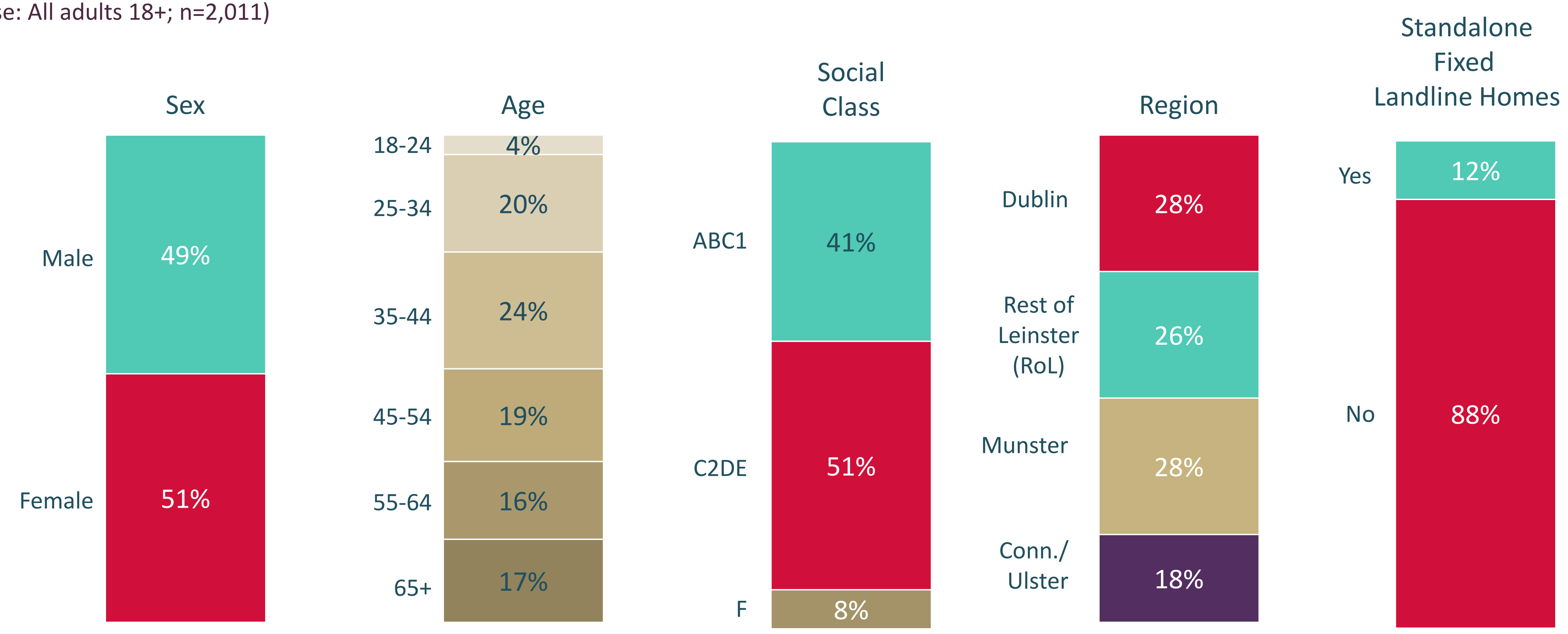
/ Interviews were quota controlled by gender, age, and social class.

/ Household decision makers for telecommunications were interviewed in the research with quota controls imposed to ensure the sample is representative of this population.

/ Throughout the report, the base size expressed is the unweighted base.

Sample profile

(Base: All adults 18+; n=2,011)



(4% of total population receive telephone support allowance)

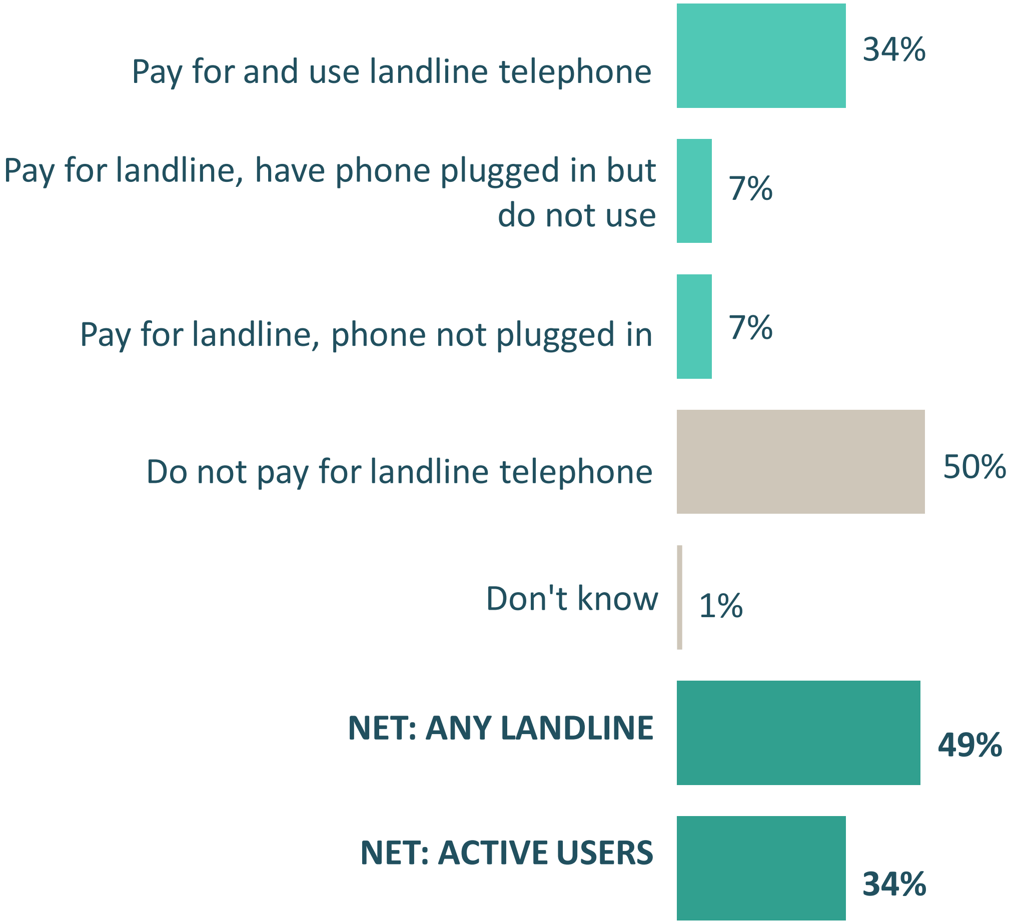
The sample is weighted to be representative of the profile of telecommunications decision makers.

Landline Ownership Details

Landline ownership

(Base: All telecoms decision makers; n=2011)

Q. Some people actually have a landline telephone in their household but simply don't use it or even have a phone plugged in. Which of the following statements best applies to you?



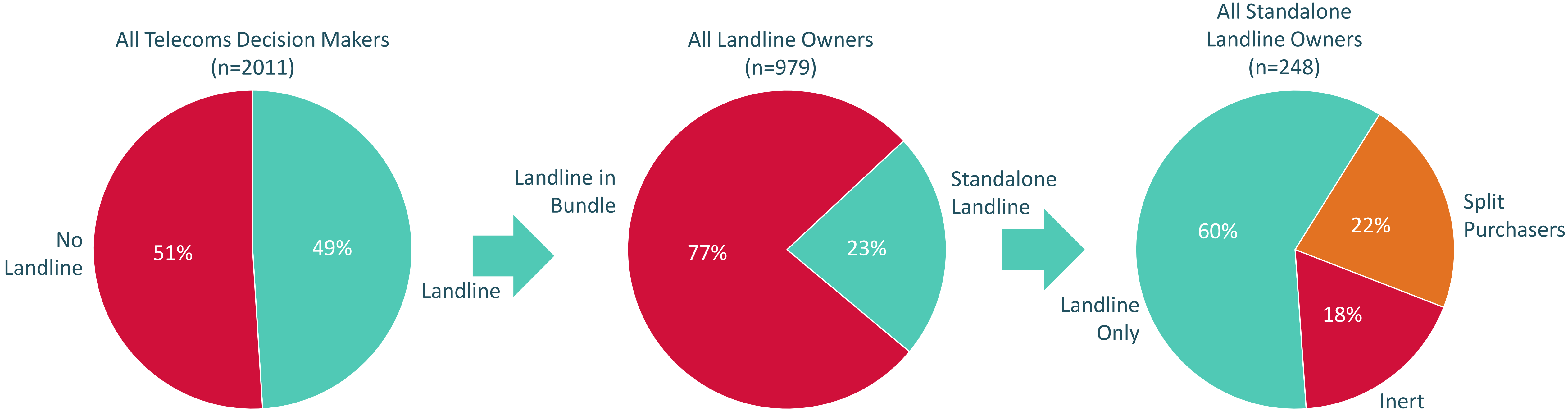
	Location			Age			
	Rural (n=730)	Sub-Urban (n=772)	Urban (n=509)	18-34 (n=481)	35-54 (n=860)	55+ (n=670)	Standalone LL (n=248)
Pay for and use landline telephone	34%	38%	32%	24%	23%	56%	82%
Pay for landline, have phone plugged in but do not use	9%	5%	8%	6%	9%	6%	7%
Pay for landline, phone not plugged in	5%	5%	9%	8%	9%	5%	5%
Do not pay for landline telephone	51%	52%	49%	61%	58%	33%	5%
Don't know	1%	*	1%	1%	1%	1%	1%
NET: ANY LANDLINE	**49%**	**48%**	**49%**	**38%**	**41%**	**66%**	**94%**
NET: ACTIVE USERS	**34%**	**38%**	**32%**	**24%**	**23%**	**56%**	**82%**

50% of telecoms decision makers surveyed do not pay for a landline, rising to 61% among those under 35. Those who pay for, and use, a landline are much more likely to be aged 55+.

(Q.1b)

Landline ownership

(Base: All telecoms decision makers; n=2011)



Note: "Standalone Landline" consists of landline owners with no other bundle, split purchasers and inert landline owners. Split Purchasers are those with a standalone landline service, but also have a bundle that does not include a fixed landline. Inert landline owners are standalone landline owners that do not use their fixed landline service.

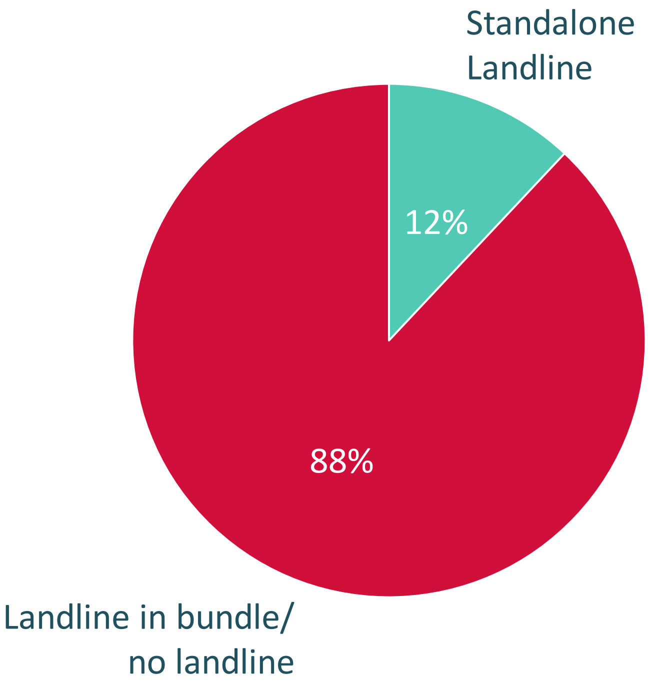
Almost half (49%) have a landline, with more than 1 in 5 of these (23%) having standalone landline.

(Q.2b)

Incidence of Standalone Landline (Landline does not form part of a bundle)

(Base: All telecoms decision makers; n=2011)

Q. Which of the following services are included as part of your bundle?



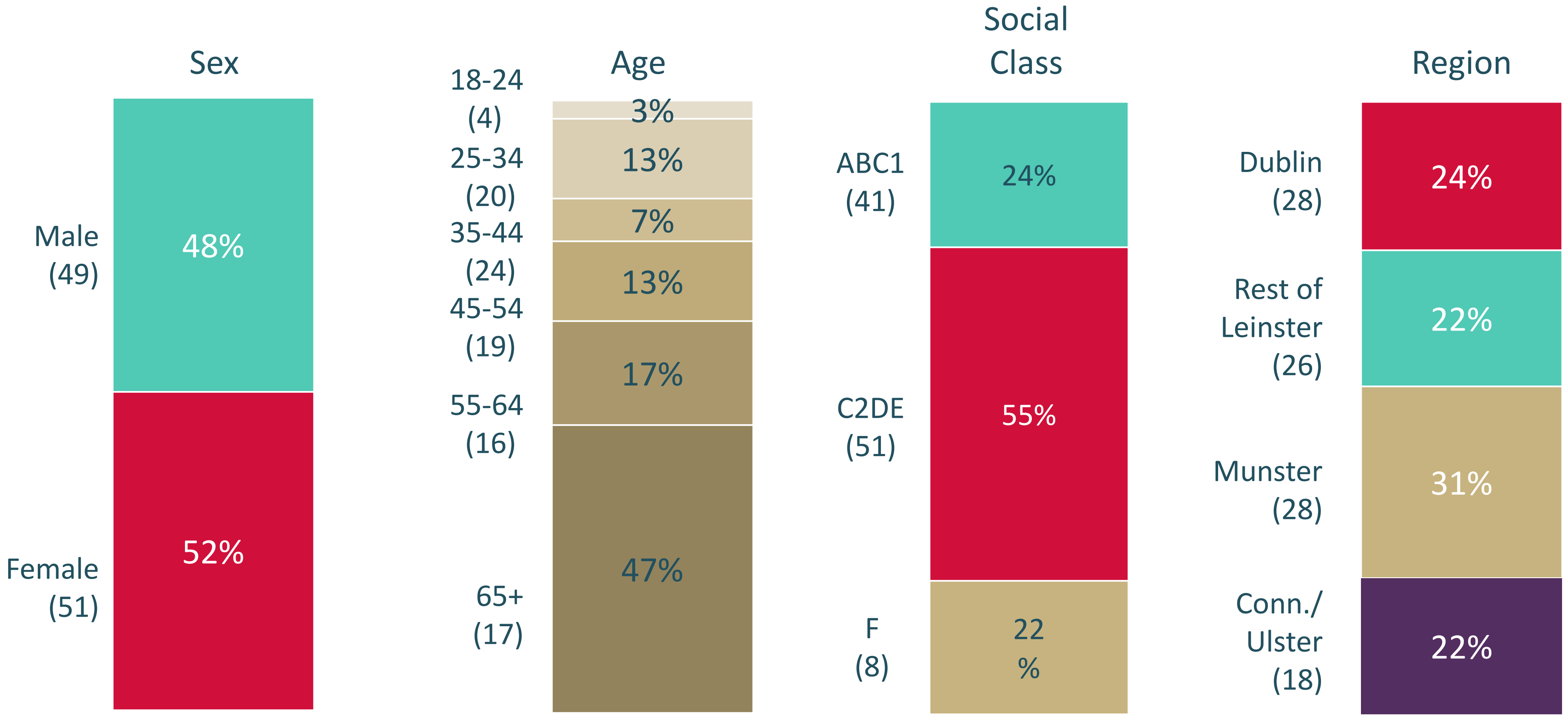
	Location			Age		
	Rural (n=730)	Sub-Urban (n=772)	Urban (n=509)	18-34 (n=481)	35-54 (n=860)	55+ (n=670)
Standalone Landline	14%	15%	10%	8%	6%	23%
Landline in bundle/ no landline	86%	85%	90%	92%	94%	77%

12% of those surveyed are classified as being Standalone Landline customers – higher among those aged 55+ and those living in sub-urban or rural areas.

(Q.2b)

Profile of Standalone Fixed Landline ownership

(Base: All standalone landline owners; n=248)



( ) = profile of telecommunication decision makers

Profile of fixed landline owners is biased significantly by those aged 65+ and those from the C2DE class.

Non Landline Users

Reasons for not using Landline

(Base: All telecoms decision makers who have a landline but do not use it/have it plugged in; n=307)

Q. For what reason do you not use your fixed landline telephone? Any other reasons?

		Location			Age		
Reason	Total	Rural (n=115)	Sub-Urban (n=89)	Urban (n=103)	18-34 (n=74)	35-54 (n=165)	55+ (n=68)
I use my mobile phone for calls & don't really need a fixed landline	68%	67%	54%	71%	81%	67%	56%
I use Skype, WhatsApp calls, Viber, Snapchat calls, Facetime instead from a computer, laptop, tablet, or mobile smart phone	23%	16%	18%	26%	21%	23%	22%
I purchase a bundle which requires me to take a fixed landline	20%	21%	23%	18%	14%	20%	24%
Cost of making calls is too high	17%	24%	11%	16%	20%	14%	19%
No need/use for it	4%	5%	7%	3%	2%	3%	7%
The phone is linked to my burglar alarm or personal safety device	4%	8%	2%	3%	2%	5%	3%
I prefer to prepay for services whenever I can but can't do that with a fixed landline	2%	1%	4%	2%	*	2%	4%
I have to pay per minute as I do not have inclusive minutes in my bill	1%	2%	0	1%	0	1%	3%
I keep it for receiving calls from certain individuals, e.g. family.	1%	1%	4%	0	1%	1%	2%
Other	6%	1%	7%	7%	1%	6%	10%

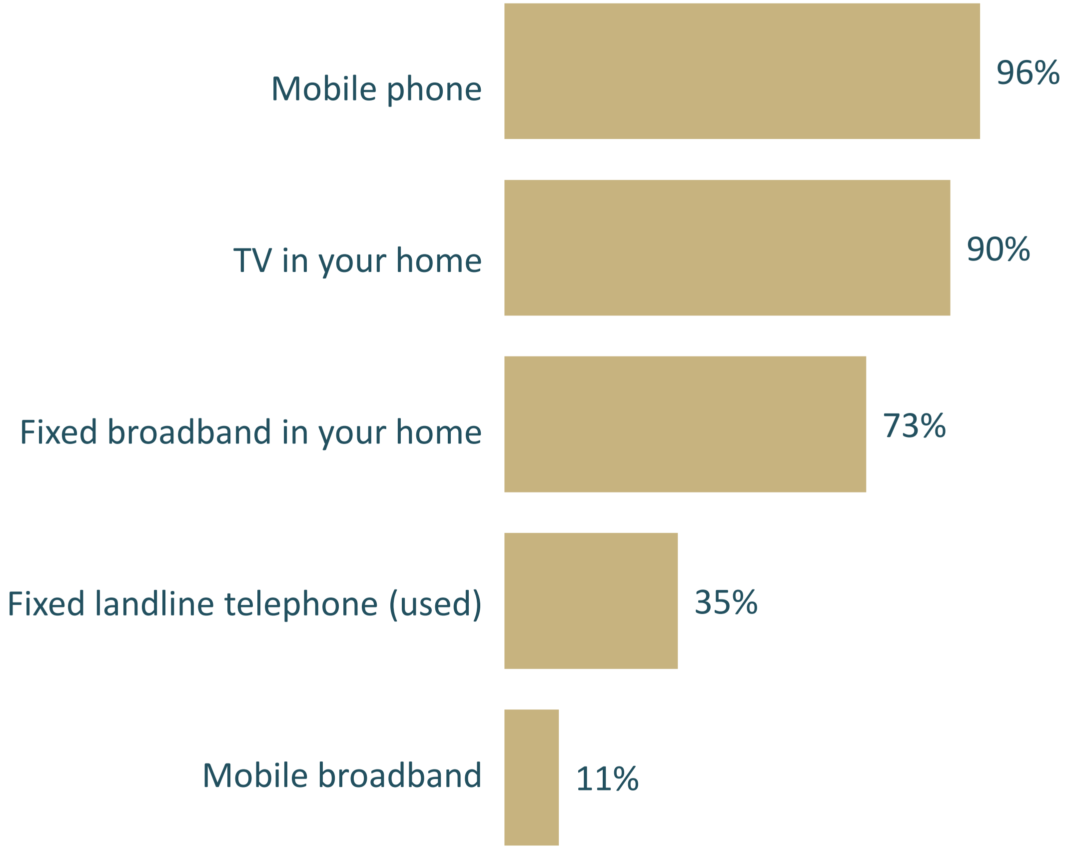
The primary reason for not using landline is using mobile phone instead. Use of Skype, WhatsApp, Viber, Snapchat, and/or Facetime on a computer is also a reason why landline is not used anymore. This was expressed by 23% of those without a landline.

Wider Telecommunications Ownership

Products ownership - I

(Base: All telecoms decision makers; n=2011)

Q. Which of the following do you personally own or have access to in your home?



	Location			Age		
	Rural (n=730)	Sub-Urban (n=772)	Urban (n=509)	18-34 (n=481)	35-54 (n=860)	55+ (n=670)
Mobile phone	96%	95%	96%	98%	99%	90%
TV in your home	94%	95%	86%	86%	89%	95%
Fixed broadband in your home	67%	67%	79%	78%	80%	61%
Fixed landline telephone (used)	35%	36%	33%	27%	27%	50%
Mobile broadband	10%	11%	12%	14%	13%	7%

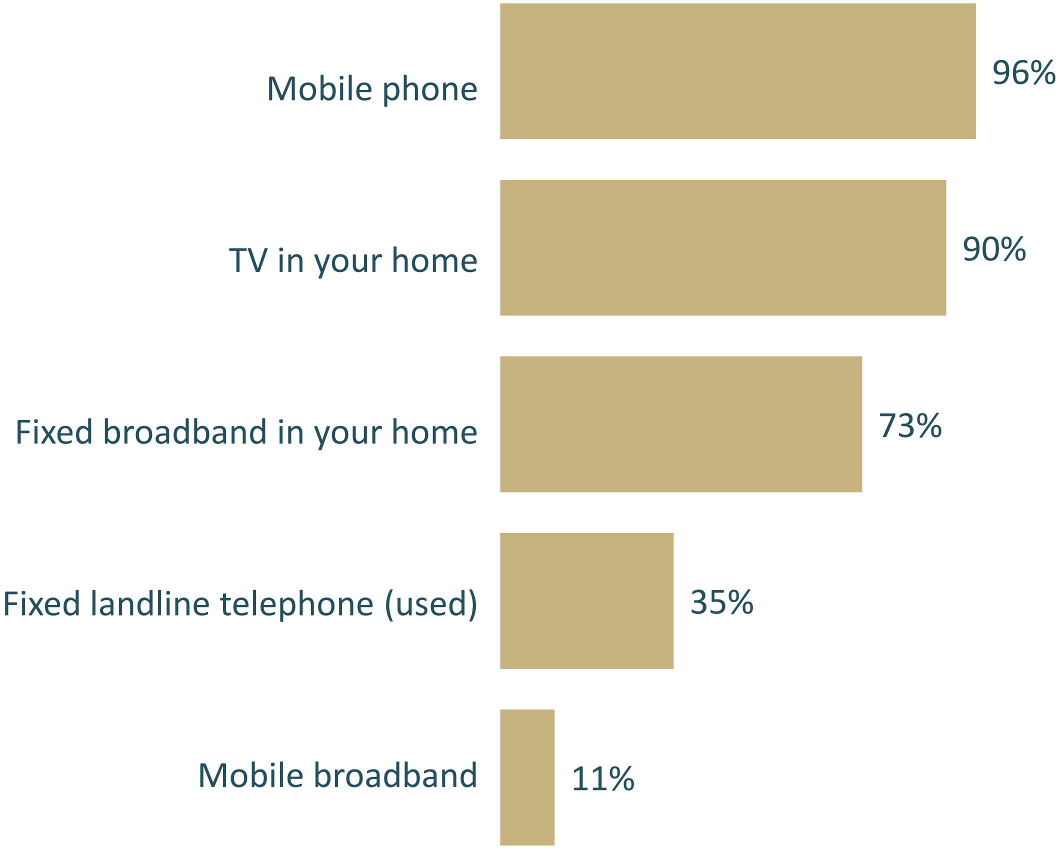
Fixed broadband is notably higher in urban areas and among those aged under 55, while TV and mobile phone ownership is 90% and 96% among these groups respectively.

(Q.1a)

Products ownership - II

(Base: All telecoms decision makers; n=2011)

Q. Which of the following do you personally own or have access to in your home?



Standalone LL (n=248)	Active LL users (n=690)	Non-Active LL Users (n=307)
81%	91%	99%
95%	97%	88%
45%	80%	94%
82%	81%	41%
5%	5%	3%

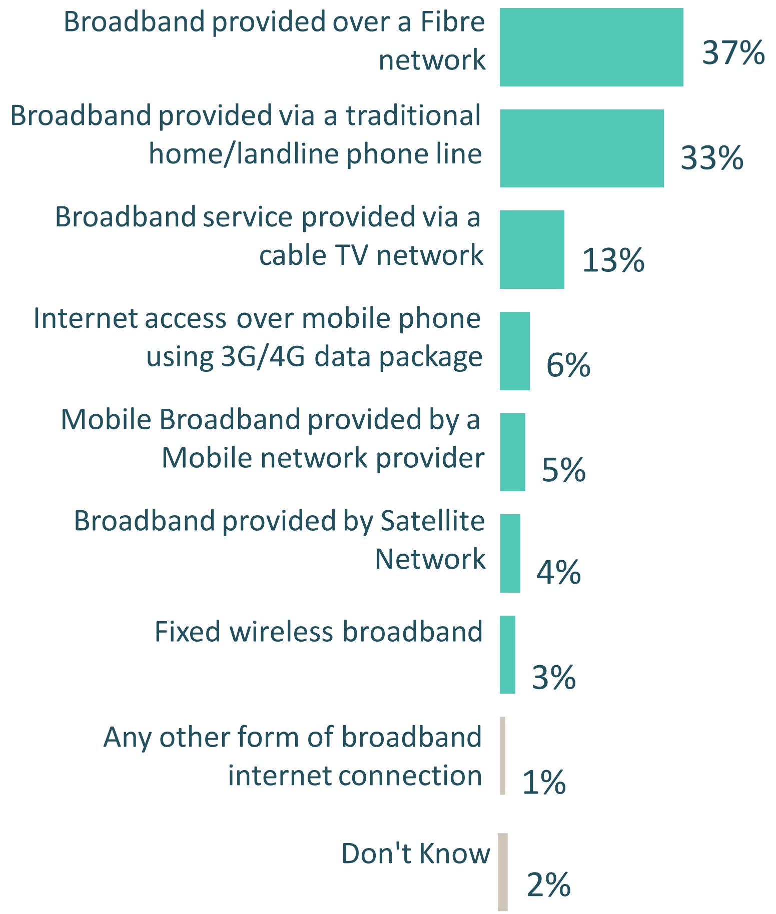
Active landline users are more likely to own a TV, while fixed broadband ownership is more likely among non-active landline owners.

(Q.1a)

Means of accessing Broadband - I

(Base: All telecoms decision makers with fixed broadband; n=1,478)

Q. There are different ways that broadband access is provided to people's homes. In your home, which of the following means of accessing broadband are used?



Location			Age		
Rural (n=501)	**Sub-Urban (n=562)**	**Urban (n=415)**	**18-34 (n=370)**	**35-54 (n=702)**	**55+ (n=406)**
31%	42%	36%	42%	36%	32%
42%	30%	31%	26%	32%	42%
8%	3%	20%	11%	13%	16%
7%	7%	5%	7%	7%	3%
3%	6%	5%	7%	6%	3%
7%	7%	1%	4%	4%	2%
4%	4%	2%	2%	3%	3%
1%	*	1%	1%	*	*
1%	2%	3%	2%	2%	3%

Fibre network (37% of those with fixed broadband - more prevalent in sub-urban areas, and among under 35s) and traditional landline (33% of those with fixed broadband - higher in rural areas and among those age 55+) are the two most common means of accessing broadband.

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(Q.6)

Means of accessing Broadband - II

(Base: All telecoms decision makers with fixed broadband; n=1,478)

Q. There are different ways that broadband access is provided to people's homes. In your home, which of the following means of accessing broadband are used?

	Total	Standalone LL (n=92)	Active LL users (n=522)	Non-Active LL Users (n=288)
Broadband provided over a Fibre network	37%	36%	43%	29%
Broadband provided via a traditional home/landline phone line	33%	31%	41%	47%
Broadband service provided via a cable TV network	13%	13%	9%	22%
Internet access over mobile phone using 3G/4G data package	6%	1%	1%	2%
Mobile Broadband provided by a mobile network provider	5%	3%	1%	*
Broadband provided by Satellite Network	4%	3%	3%	3%
Fixed wireless broadband	3%	6%	2%	*
Any other form of broadband internet connection	1%	*	*	0
Don't Know	2%	7%	3%	1%

***Has broadband but not bundled with landline**

Active landline users are more likely than average to access broadband using either fibre or traditional landline.

(Q.6)

Reasons for not having Broadband

(Base: All telecoms decision makers without fixed broadband; n=709)

Q. For what reason do you not have a fixed broadband connection in your home? Any other reasons?

		Location			Age			
	Total	Rural (n=269)	Sub-Urban (n=297)	Urban (n=143)	18-34 (n=168)	35-54 (n=237)	55+ (n=304)	Standalone LL (n=176)
Don't need/use	40%	46%	41%	35%	18%	31%	57%	64%
Use smartphone instead	27%	27%	26%	28%	50%	32%	11%	6%
Monthly price too high	19%	14%	22%	20%	28%	23%	12%	5%
Installation/connection charges are too high	12%	10%	15%	10%	16%	15%	8%	6%
Use broadband at work/ elsewhere	11%	16%	15%	5%	19%	16%	3%	2%
Don't know how to use	10%	13%	13%	7%	4%	5%	17%	19%
Internet too slow in area	8%	9%	11%	4%	15%	9%	3%	6%
Cost of computers/other devices too high	5%	9%	6%	2%	5%	8%	2%	2%
Internet not available in area	3%	4%	2%	3%	1%	3%	4%	5%
Worried about security	1%	1%	1%	1%	*	*	2%	1%
Other	5%	3%	3%	8%	5%	5%	4%	4%

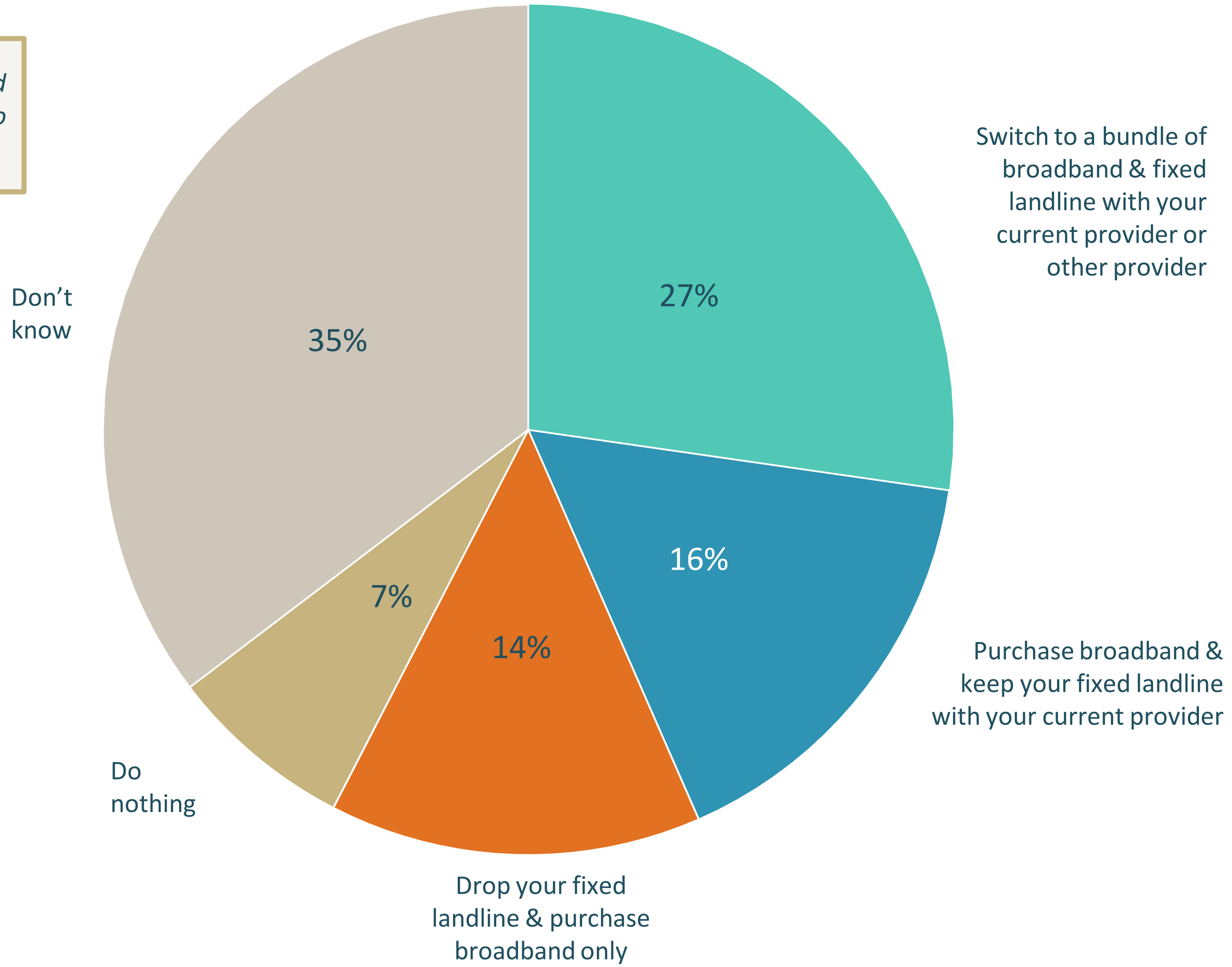
40% of telecoms decision makers surveyed who don't use/have fixed broadband cite lack of need, particularly among those aged 55+. 19% indicate that cost is a barrier, with prices being too high.

(Q.8)

Actions if High Speed Broadband became available

(Base: All telecoms decision makers without fixed broadband because not available or too slow; n=86)

Q. Which, if any, of the following would you do if high speed broadband were to become available in your area?



***CAUTION: SMALL BASE SIZE**

27% of those who say they don't use broadband due to lack of speed/availability would switch to a broadband bundle if high speed broadband became available. Another 16% would purchase broadband separately but keep landline, while 14% would purchase broadband and stop buying landline.

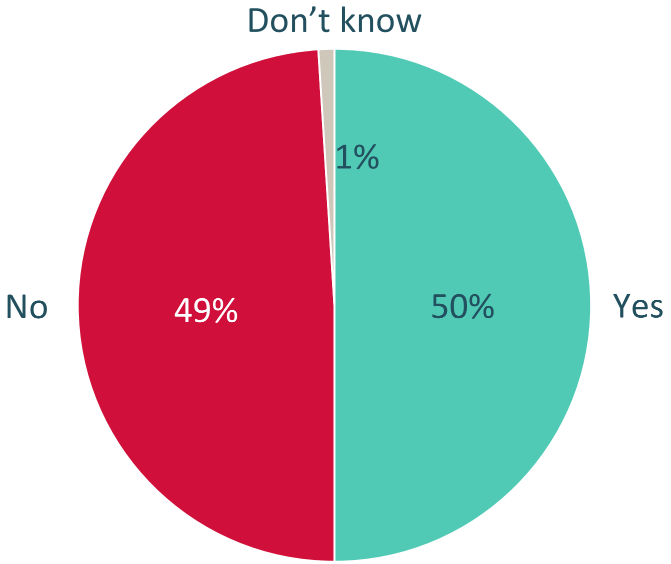
(Q.9)

Bundles

Incidence of owning a Bundle

(Base: All multi-product holders; n=1962)

Q. You mentioned that you have more than one telecommunications service in your home. Do you purchase more than one of these services as part of an overall price – this is commonly called a 'bundle' i.e. Multiple services bought in a bundle from the same service provider for an overall price.



	Location			Landline Use		
	Rural (n=715)	Sub-Urban (n=755)	Urban (n=492)	Standalone LL* (n=244)	Active LL users (n=683)	Non-Active LL Users (n=305)
Yes	40%	44%	57%	22%	69%	73%
No	58%	55%	41%	74%	29%	27%
Don't Know	1%	1%	1%	4%	1%	*

***Has a bundle NOT including fixed landline**

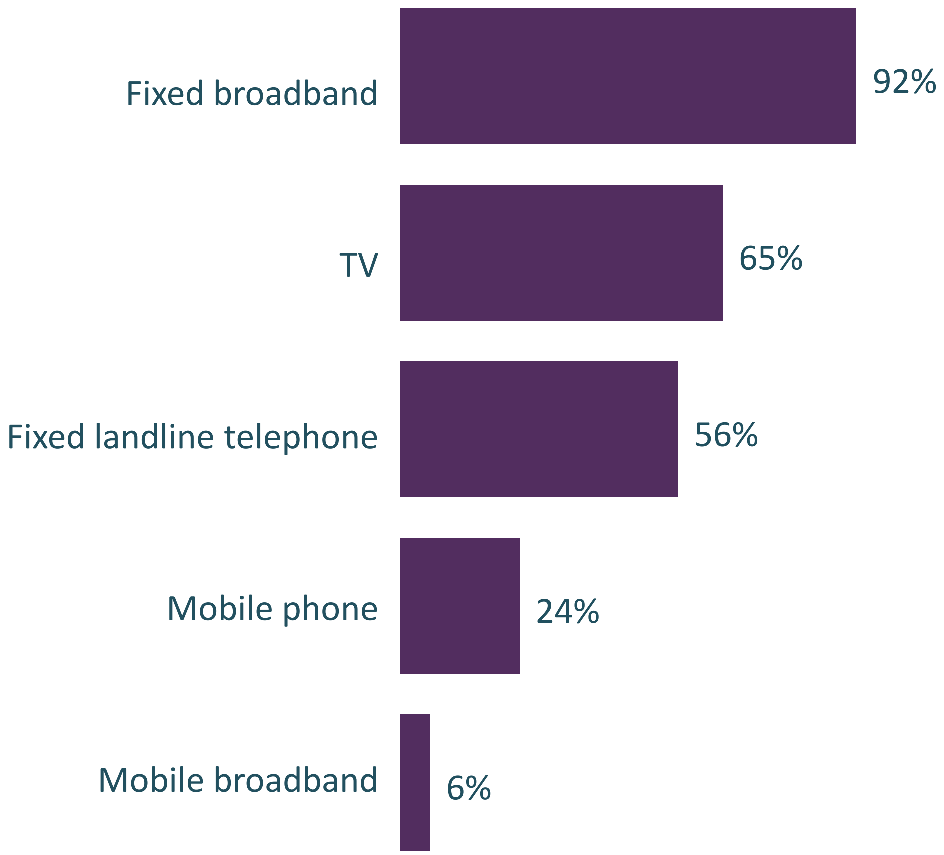
50% of telecommunications decision makers who have more than one product, have a bundle. This is higher in urban areas and particularly among those who are paying for landline but don't actively use it.

(Q.2a)

Products included in Bundle - I

(Base: All telecoms decision makers with bundle; n=913)

Q. Which of the following services are included as part of your bundle?



Location			Age		
Rural (n=301)	Sub-Urban (n=345)	Urban (n=267)	18-34 (n=192)	35-54 (n=419)	55+ (n=302)
93%	91%	91%	90%	93%	90%
55%	50%	73%	79%	63%	55%
67%	66%	49%	45%	53%	70%
31%	22%	23%	18%	29%	21%
5%	9%	6%	8%	5%	7%

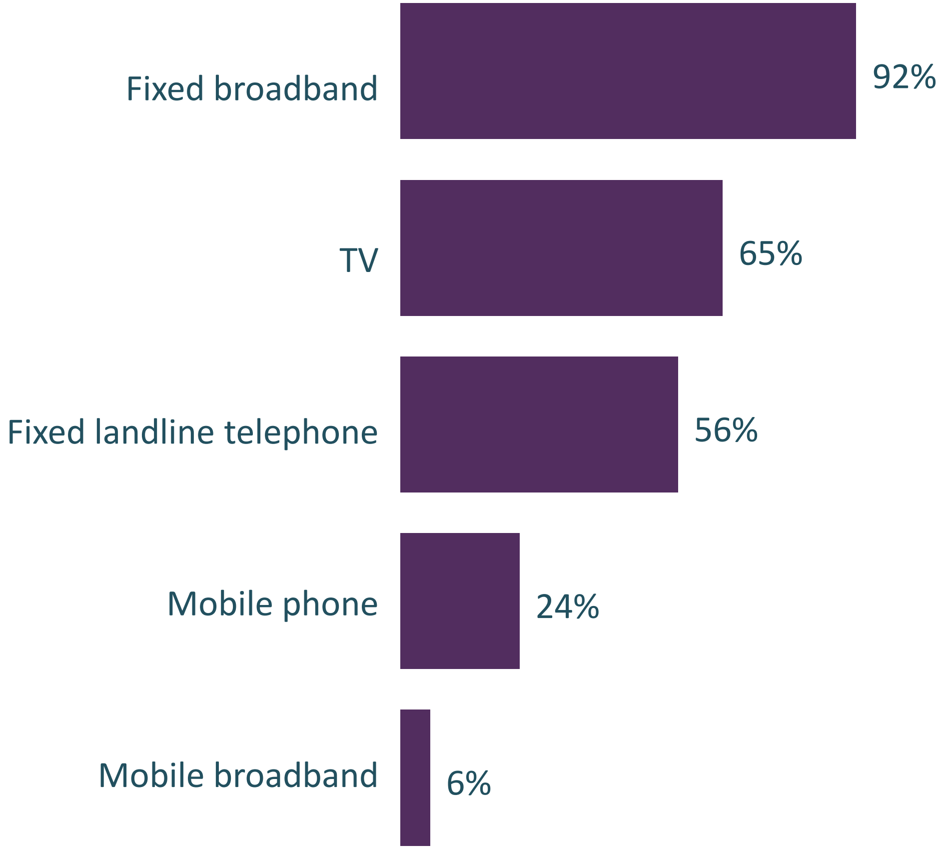
92% of bundles contain fixed broadband, with 65% including TV, and 56% including telephone. Mobile phone and mobile broadband are less likely to be components of a bundle, at 24% and 6% respectively.

(Q.2b)

Products included in Bundle - II

(Base: All telecoms decision makers with bundle; n=913)

Q. Which of the following services are included as part of your bundle?



Standalone LL (n=36)	Active LL users (n=458)	Non-Active LL Users (n=223)
99%	97%	60%
71%	59%	68%
0%	89%	97%
17%	17%	25%
10%	3%	3%

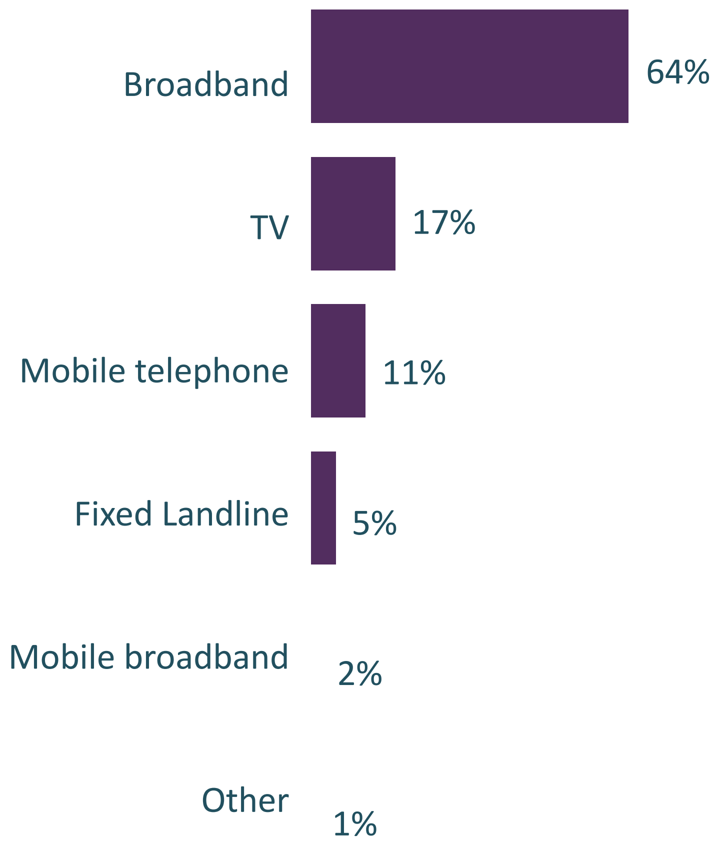
A small proportion of standalone landline users do have a bundle - most likely with fixed broadband and TV. By definition, landline cannot form part of this bundle.

(Q.2b)

Most important product in Bundle - I

Q. Thinking about your bundle, which service in this bundle would you say is most important to your household?

(Base: All telecoms decision makers with bundle; n=913)



Location			Age		
Rural (n=301)	Sub-Urban (n=345)	Urban (n=267)	18-34 (n=192)	35-54 (n=419)	55+ (n=302)
63%	64%	65%	77%	65%	53%
14%	12%	20%	9%	19%	22%
12%	10%	10%	10%	11%	10%
9%	9%	2%	0	3%	12%
1%	3%	2%	4%	1%	2%
*	1%	1%	*	1%	1%

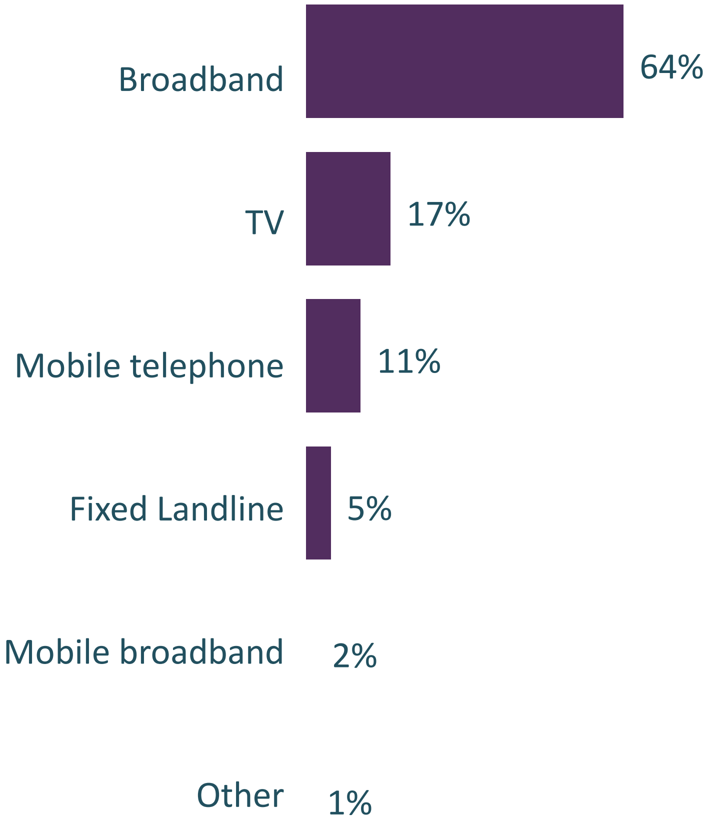
For 64% of those with a bundle, broadband is deemed to be the most important product – this is particularly the case among under 35s, while older customers are more likely than average to consider landline and TV most important.

(Q.7)

Most important product in Bundle - II

(Base: All telecoms decision makers with bundle; n=913)

Q. Thinking about your bundle, which service in this bundle would you say is most important to your household?



	Standalone LL (n=36*)	Active LL users (n=458)	Non-Active LL Users (n=223)
Broadband	82%	65%	67%
TV	12%	18%	22%
Mobile telephone	4%	4%	11%
Fixed Landline	0%	10%	*
Mobile broadband	1%	1%	*
Other	1%	1%	0%

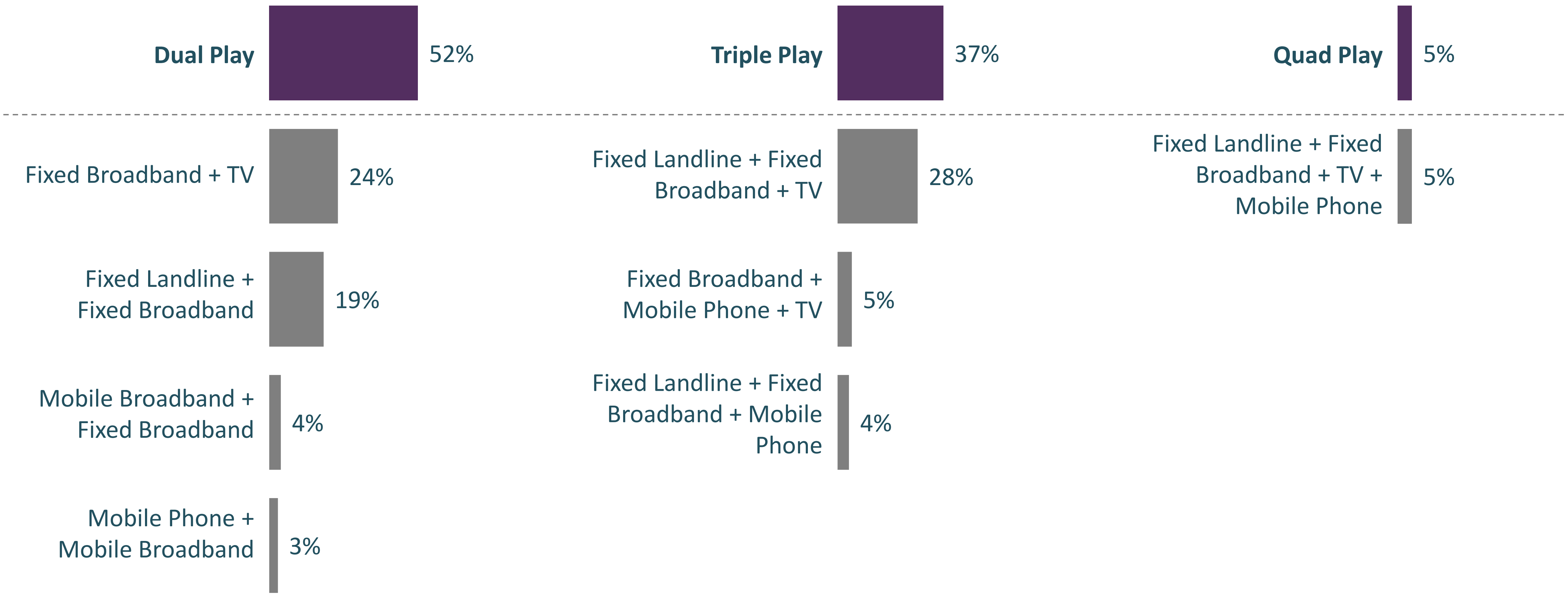
*CAUTION: SMALL BASE SIZE

1 in 10 active landline users with a bundle deem landline most important, but broadband is consistently selected as most important by majority regardless of how customers interact with landline.

(Q.7)

Incidence of Dual, Triple and Quad Play

(Base: All telecoms decision makers with bundle; n=913)



NOTE: All others <3%

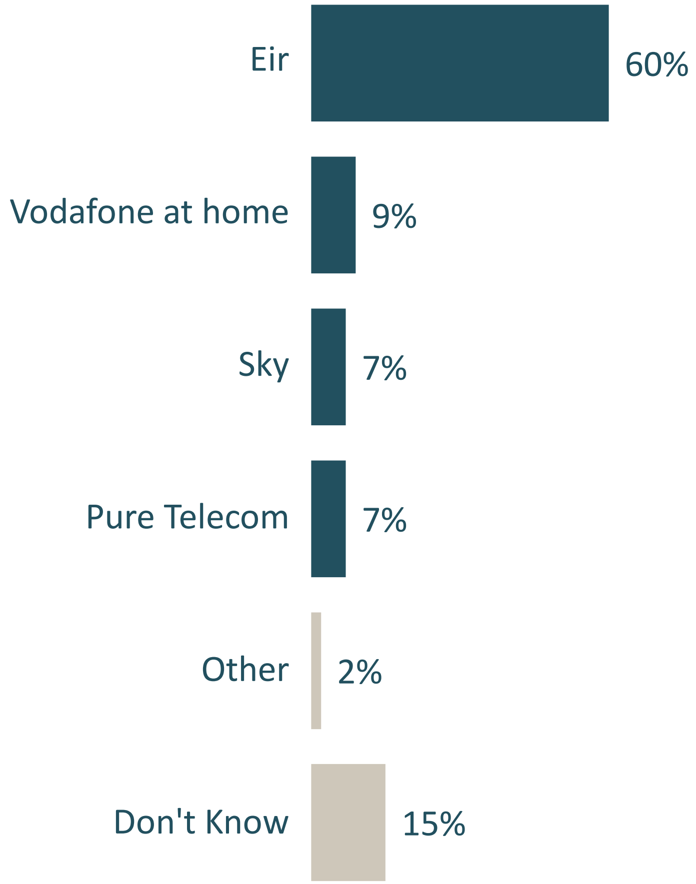
More than half (52%) of bundle owners are Dual Play, while more than 1 in 3 (37%) are Triple Play. Quad Play accounts for only 5% of bundle owners.

Service Providers

Standalone Fixed Landline Provider - I

Q. Who is your service provider for your home phone/fixed landline?

(Base: All telecoms decision makers with fixed landline not in bundle; n=248)



Location			Age		
Rural (n=88)	Sub-Urban (n=110)	Urban (n=50)	18-34 (n=31*)	35-54 (n=54)	55+ (n=163)
76%	78%	39%	26%	41%	75%
12%	7%	8%	10%	11%	8%
4%	5%	9%	11%	13%	4%
6%	7%	7%	0	10%	7%
0	2%	2%	3%	4%	0
2%	1%	33%	49%	16%	6%

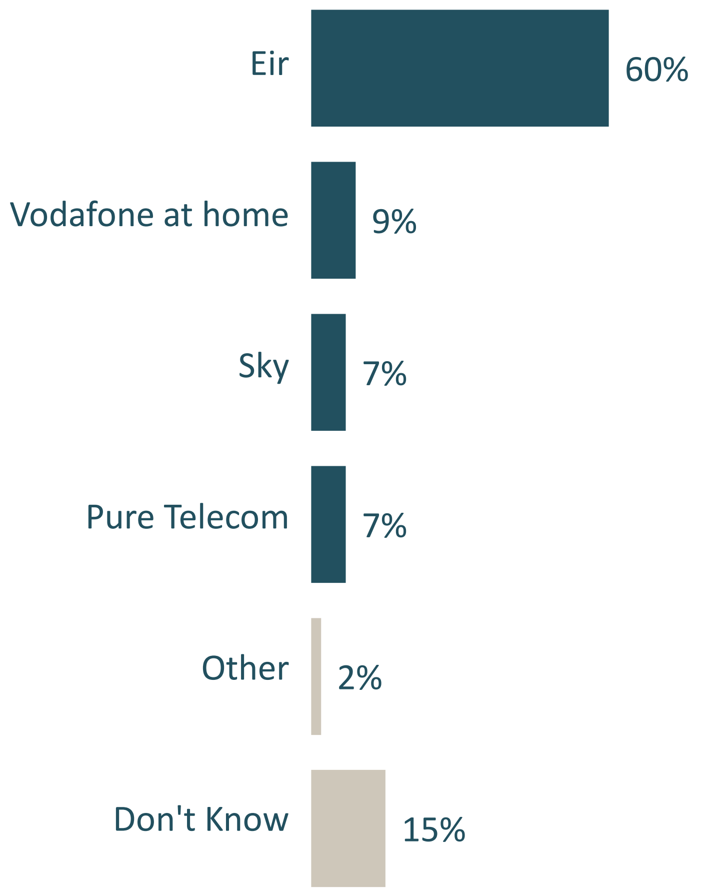
Eir holds a strong lead in share among those with fixed landline not in a bundle – driven by strength seen in rural and sub-urban areas as well as among those aged 55+.

(Q.3a)

Standalone Fixed Landline Provider - II

Q. Who is your service provider for your home phone/fixed landline?

(Base: All telecoms decision makers with fixed landline not in bundle; n=248)



Active LL users (n=210)
67%
10%
7%
4%
8%
1%
14%

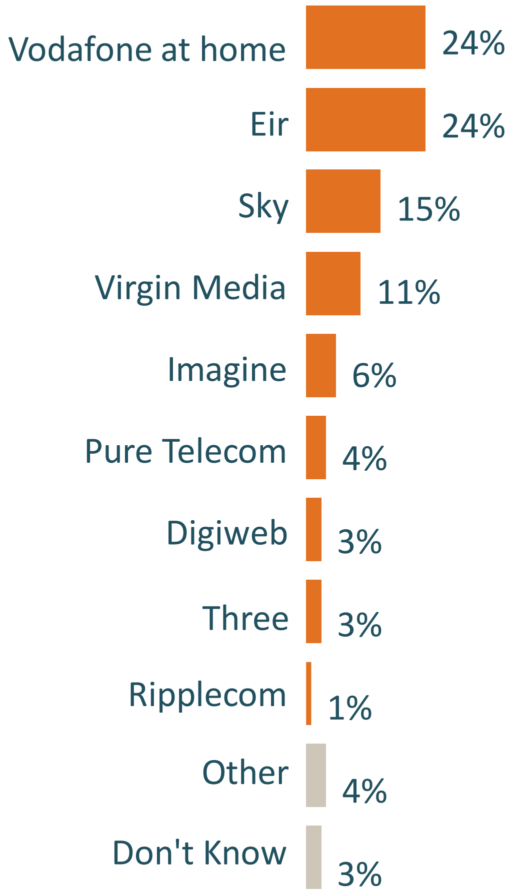
Those who are active landline users are significantly more likely to have their landline with eir.

(Q.3a)

Standalone Fixed Broadband Provider

Q. Who is your service provider for your fixed broadband service?

(Base: All telecoms decision makers with broadband not in bundle; n=501)



	Location			Age		
	Rural (n=189)	Sub-Urban (n=188)	Urban (n=124)	18-34 (n=153)	35-54 (n=245)	55+ (n=103)
Vodafone at home	28%	31%	20%	27%	25%	21%
Eir	25%	22%	25%	16%	26%	28%
Sky	10%	11%	19%	13%	16%	15%
Virgin Media	3%	1%	20%	13%	10%	11%
Imagine	10%	8%	3%	5%	7%	4%
Pure Telecom	6%	1%	4%	2%	4%	6%
Digiweb	5%	7%	1%	5%	4%	2%
Three	3%	2%	3%	5%	1%	3%
Ripplecom	*	4%	0	2%	1%	0
Other	7%	5%	2%	7%	2%	3%
Don't Know	3%	4%	3%	3%	2%	6%

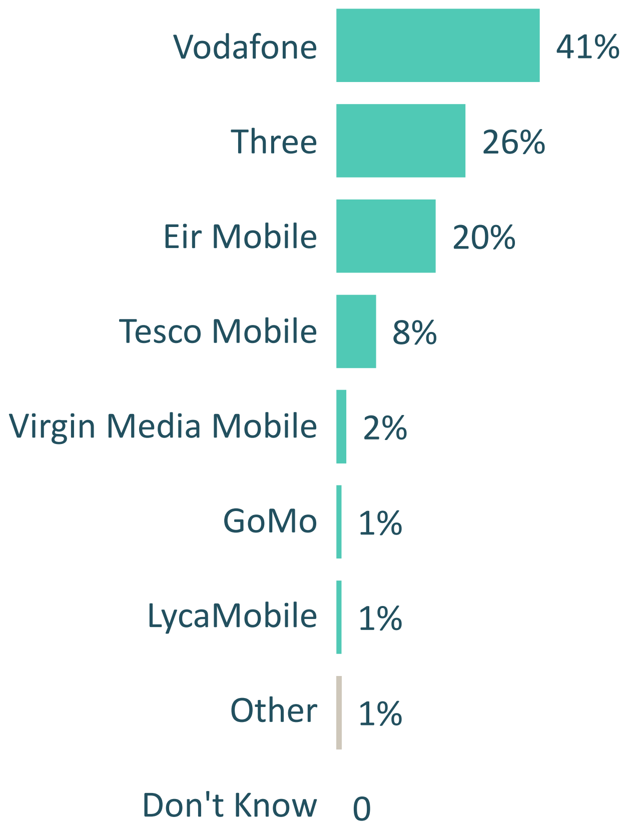
Vodafone at home and eir are tied as leading providers of standalone fixed broadband.

(Q.3b)

Standalone Mobile Phone Provider

Q. Who is your service provider for your mobile phone?

(Base: All telecoms decision makers with mobile phone not in bundle; n=1701)



Location		
Rural (n=614)	Sub-Urban (n=661)	Urban (n=426)
41%	48%	36%
34%	28%	21%
13%	12%	27%
9%	8%	9%
1%	1%	3%
1%	1%	1%
1%	*	1%
1%	1%	*
*	*	*

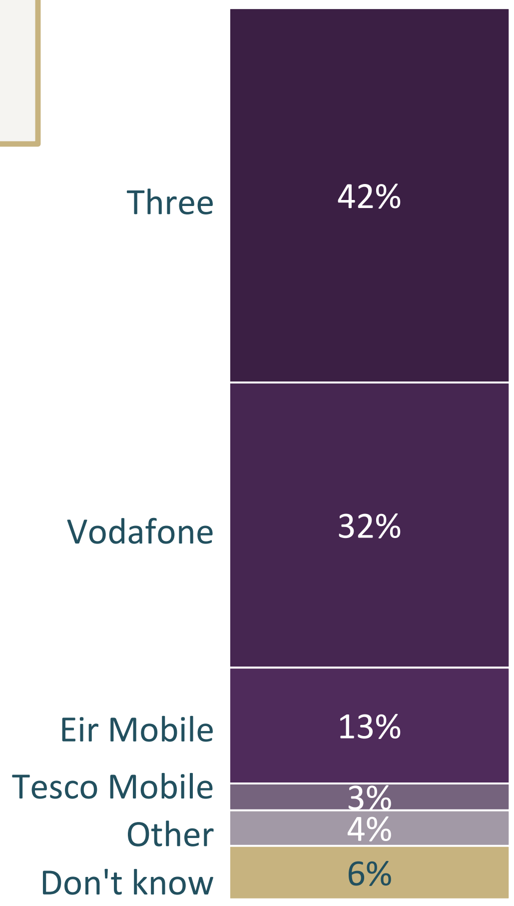
Vodafone is the leading mobile phone provider among those with mobile phone not in bundle and is particularly strong among those in sub-urban areas.

(Q.3c)

Service Provider for Standalone Mobile Broadband

(Base: All telecoms decision makers with mobile broadband not in bundle; n=187)

Q. Who is your service provider for your Mobile broadband service?



	Location		
	Rural (n=71)	**Sub-Urban (n=63)**	**Urban (n=53)**
Three	59%	44%	33%
Vodafone	25%	43%	30%
Eir Mobile	7%	8%	18%
Tesco Mobile	1%	3%	4%
Other	5%	1%	5%
Don't know	3%	0	10%

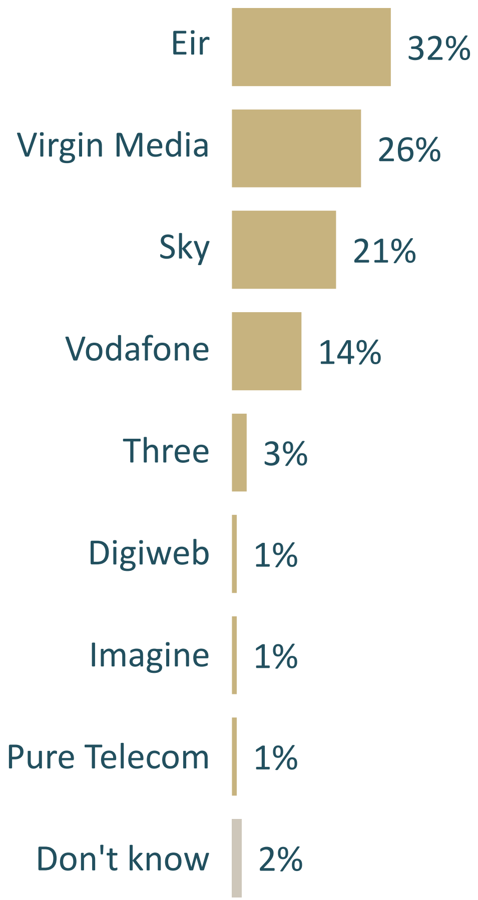
Three and Vodafone account for 74% of all standalone mobile broadband ownership in the survey.

(Q.3d)

Service Provider for Bundle

(Base: All telecoms decision makers with a bundle; n=913)

Q. What service provider provides your bundle?



Location			Age		
Rural (n=301)	**Sub-Urban (n=345)**	**Urban (n=267)**	**18-34 (n=192)**	**35-54 (n=419)**	**55+ (n=302)**
44%	37%	26%	22%	31%	40%
2%	3%	42%	38%	23%	20%
29%	28%	16%	26%	20%	17%
14%	25%	9%	6%	18%	15%
4%	4%	2%	3%	3%	1%
0	1%	2%	1%	2%	*
2%	1%	*	1%	*	1%
1%	2%	*	0	1%	1%
1%	0	2%	3%	*	3%

Bundles are most commonly held with eir, followed by Virgin Media and Sky. Eir is more likely to be the Provider of choice among those aged 55+, while under 35's are more likely to choose either Virgin Media or Sky.

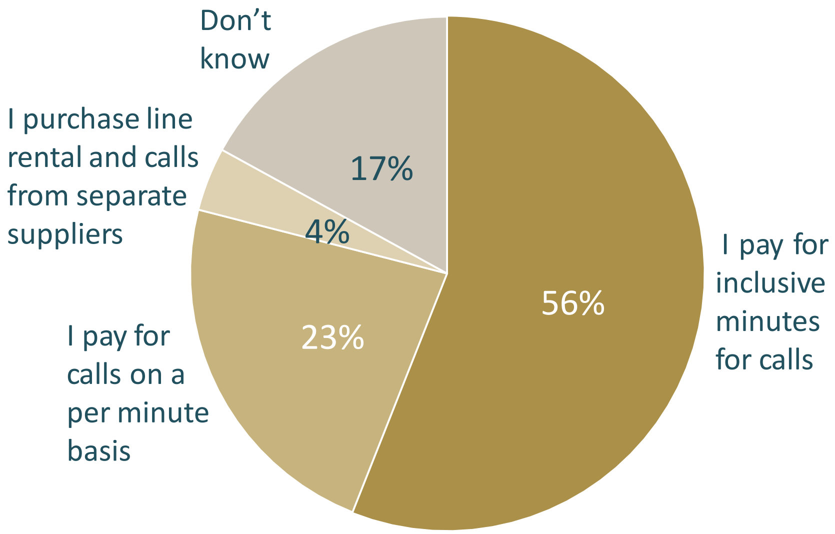
(Q.4)

Landline Costs

Means of payment for Landline Calls

(Base: All telecoms decision makers with landline and using it; n=690)

Q. Which of the following best describes how you pay for your fixed landline calls?



	Location			Age			
	Rural (n=237)	Sub-Urban (n=297)	Urban (n=156)	18-34 (n=84)	35-54 (n=210)	55+ (n=396)	Standalone LL (n=210)
I pay for inclusive minutes for calls	59%	74%	44%	38%	60%	59%	49%
I pay for calls on a per minute basis	22%	14%	29%	39%	25%	17%	32%
I purchase line rental & calls from separate suppliers	3%	2%	7%	2%	4%	5%	4%
Don't know	17%	10%	21%	21%	11%	18%	16%

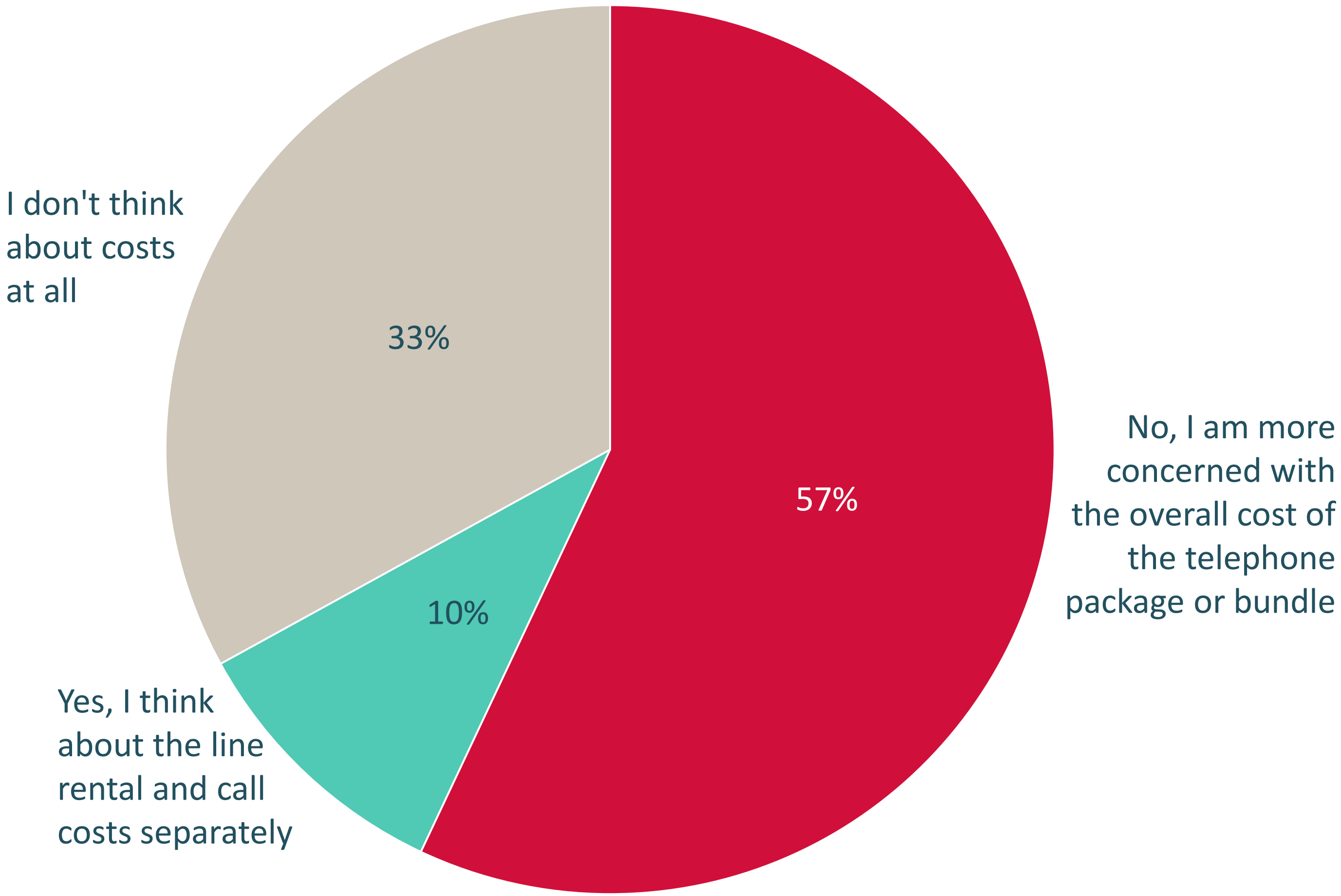
56% of those using landline pay for inclusive minutes, with 23% paying for calls on a per minute basis. However, paying per minute is more likely to be found among urban users, those aged below 35, and those on standalone landline. 17% of customers are unaware how they pay for calls.

(Q.10)

Thoughts on Landline Costs

(Base: All telecoms decision makers with landline who purchase line rental and calls from separate suppliers; n=27)

Q. When you are thinking about the cost of your fixed landline telephone package or bundle, do you think about the cost of the line rental and calls separately?



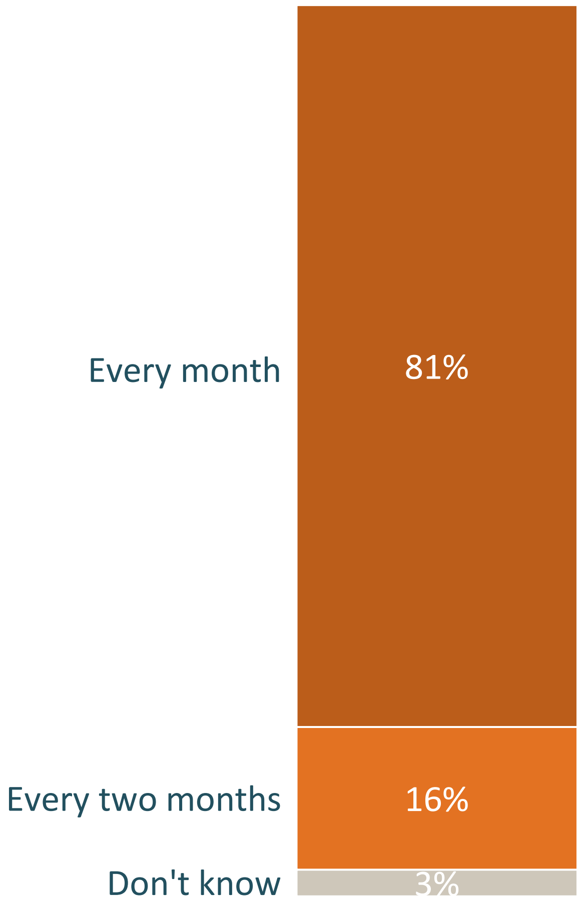
Only 10% of customers who purchase line rental and calls from separate providers think about these costs separately.

(Q.12)

Frequency of Billing

(Base: All telecoms decision makers with landline and using it; n=690)

Q. How often are you billed for your home phone/fixed landline package?



	Location			Age		
	Rural (n=237)	Sub-Urban (n=297)	Urban (n=156)	18-34 (n=84)	35-54 (n=210)	55+ (n=396)
Every month	72%	86%	82%	86%	83%	78%
Every two months	27%	13%	12%	9%	14%	19%
Don't Know	2%	1%	6%	6%	3%	3%

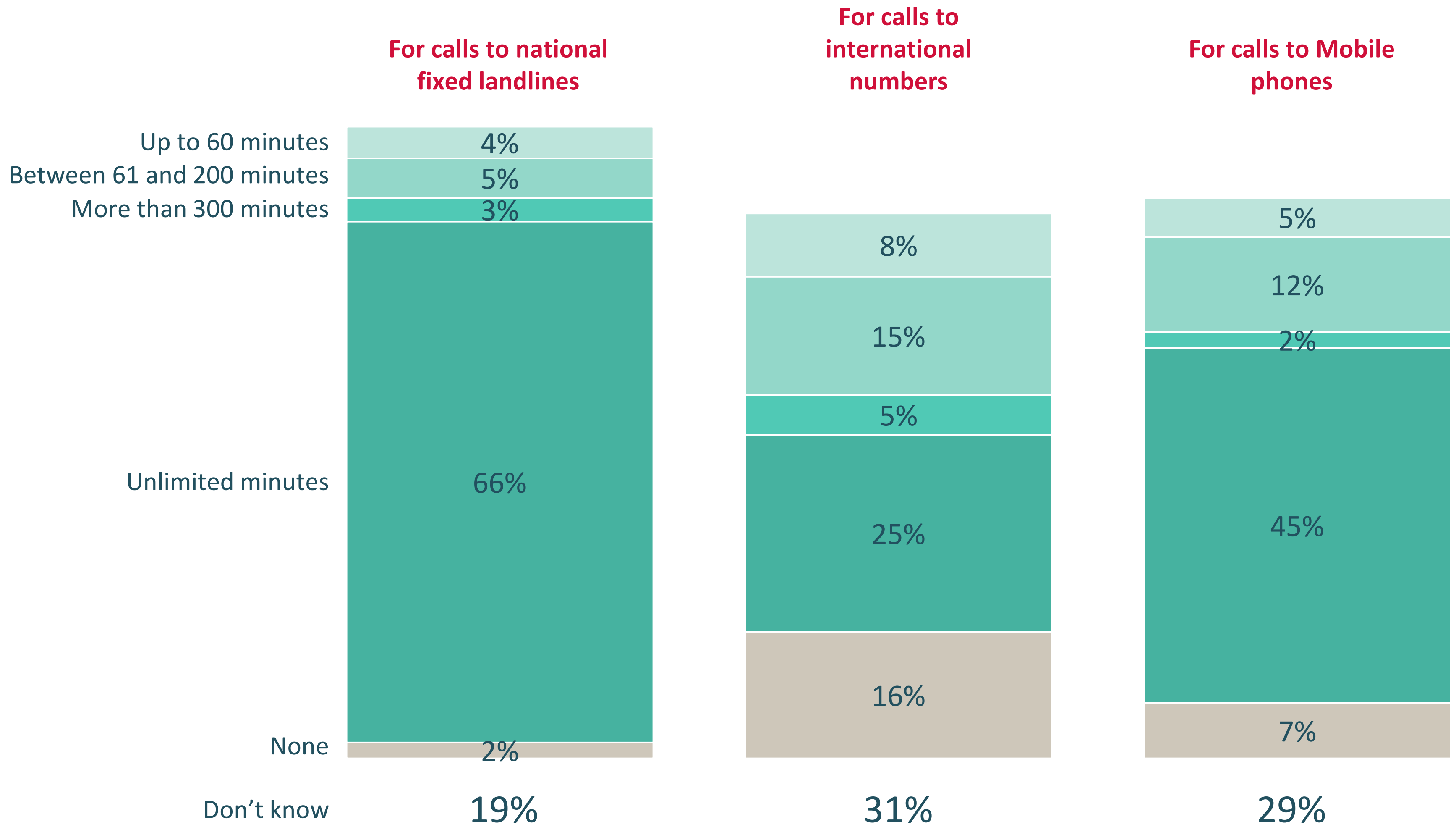
81% of landline users receive bills on a monthly basis. Those living in rural areas are more likely than average to receive a bill every two months.

(Q.11)

Inclusive Minutes per Call Type

(Base: All telecoms decision makers who pay for inclusive minutes for calls; n = 438)

Q. In your fixed landline call package, how many inclusive call minutes are included for each of the following call types?



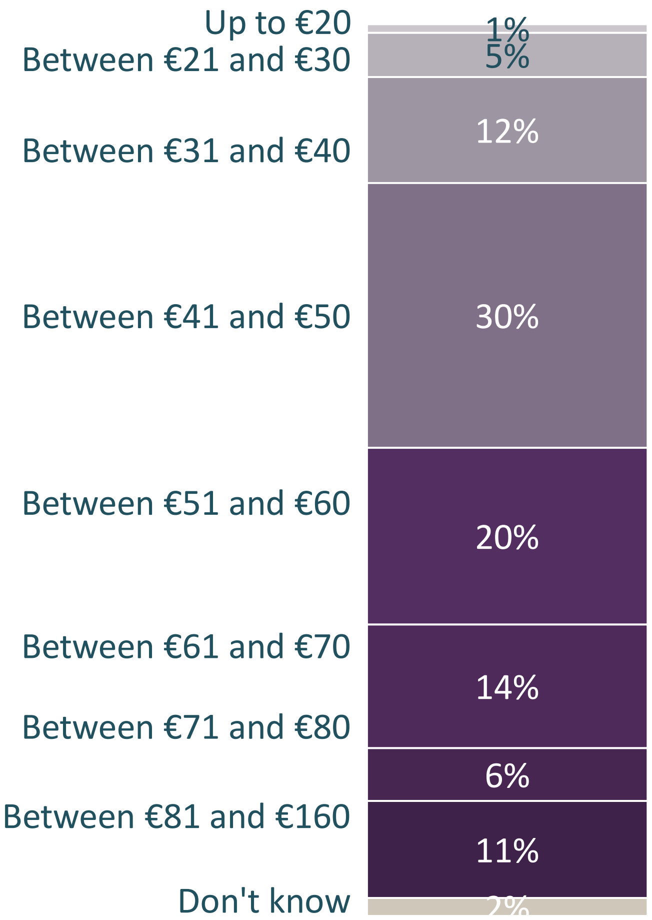
66% of those who pay for inclusive call minutes have unlimited minutes to national fixed landlines, whereas 45% have unlimited call minutes to mobile phones.

(Q.13)

Landline Bill – not in a Bundle

(Base: All standalone landline users; n=210)

Q. How much does your fixed landline bill typically cost per billing period?



MEAN AMOUNT **€56.44**

	Location		
	Rural (n=76)	Sub-Urban (n=99)	Urban (n=35*)
Up to €20	1%	0	3%
Between €21 and €30	3%	2%	9%
Between €31 and €40	8%	13%	15%
Between €41 and €50	36%	35%	19%
Between €51 and €60	19%	15%	26%
Between €61 and €70	13%	23%	6%
Between €71 and €80	6%	3%	8%
Between €81 and €160	14%	8%	9%
Don't know	1%	1%	4%
MEAN AMOUNT	**€60.48**	**€55.64**	**€54.36**

***CAUTION: SMALL BASE SIZE**

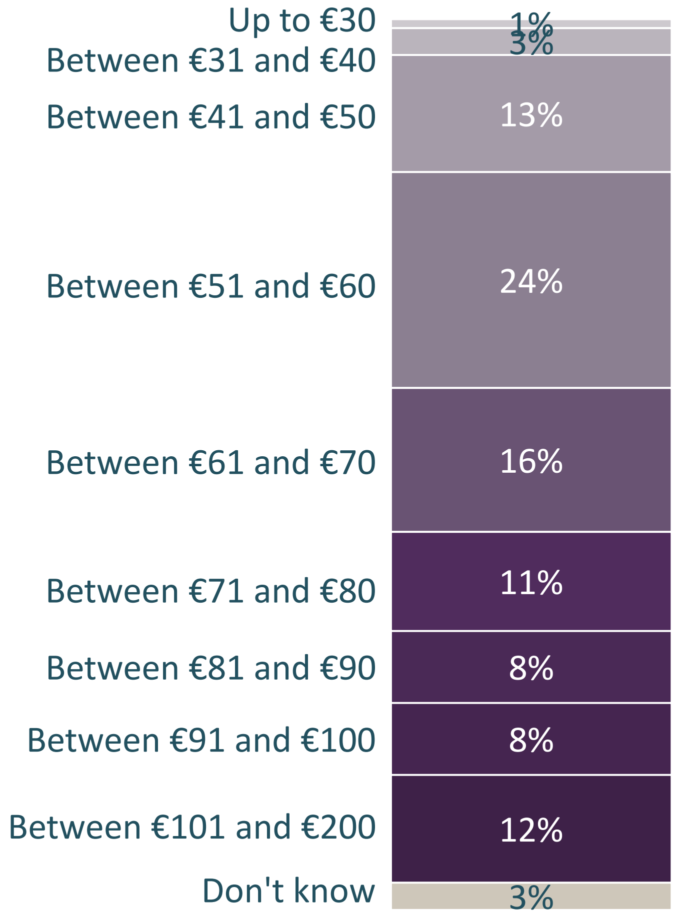
When asked to report their typical landline bill, on average, those with standalone landline are paying slightly more than €57. This figure is slightly higher among those in rural areas and lower among those in urban locations.

(Q.14)

Landline Bill – in a Bundle

Q. How much does your bundle including fixed landline bill typically cost per billing period?

(Base: All telecoms decision makers with landline in a bundle; n = 416)



MEAN SCORE **€72.48**

	Location			Age		
	Rural (n=139)	**Sub-Urban (n=176)**	**Urban (n=101)**	**18-34 (n=58)**	**35-54 (n=161)**	**55+ (n=197)**
Up to €30	1%	4%	1%	0	3%	1%
Between €31 and €40	4%	3%	3%	1%	3%	5%
Between €41 and €50	16%	12%	11%	22%	13%	8%
Between €51 and €60	20%	23%	25%	33%	27%	16%
Between €61 and €70	13%	12%	19%	23%	14%	15%
Between €71 and €80	14%	11%	9%	5%	10%	14%
Between €81 and €90	6%	8%	9%	1%	8%	12%
Between €91 and €100	5%	10%	9%	5%	10%	8%
Between €101 and €200	19%	15%	10%	4%	11%	18%
Don't Know	3%	1%	3%	6%	1%	3%
MEAN SCORE	**€74.35**	**€72.44**	**€71.82**	**€61.89**	**€70.22**	**€79.39**

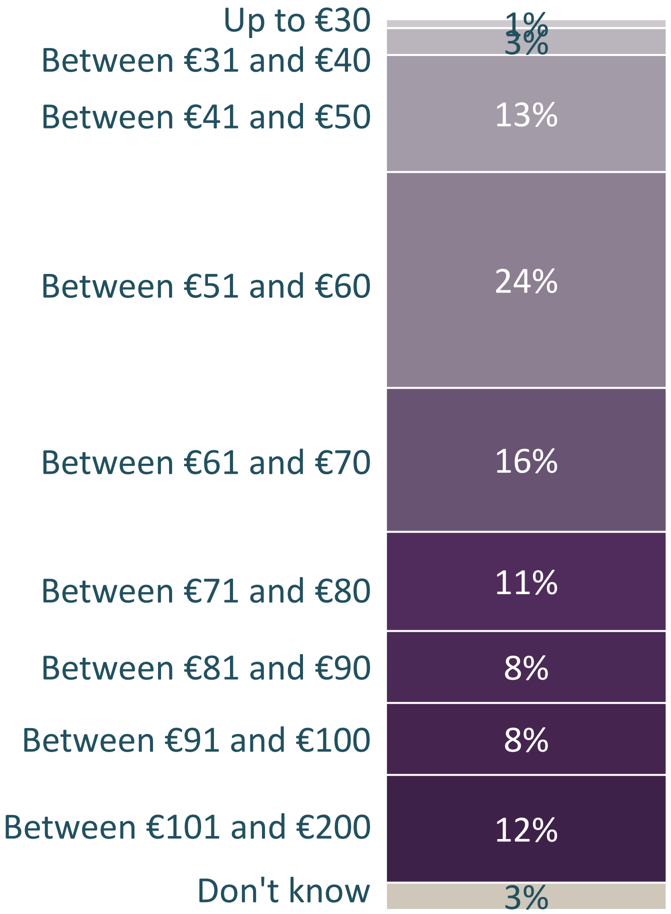
The bill for those with landline in a bundle is on average a further €15 higher than that recorded among standalone landline customers at €72. Again, we see those in rural areas are paying slightly more, but the real discrepancy is found in terms of age, where those aged 55+ are paying almost €7 more than average, while those under 35 are paying over €10 less.

REDC

(Q.14)

Landline Bill – in a Bundle

(Base: All telecoms decision makers with landline in a bundle; n = 416)



MEAN SCORE **€72.48**

	Dual Play Fixed LL + Fixed BB (n=191)	**Triple Play** Fixed LL + Fixed BB + TV (n=141)
Up to €30	3%	1%
Between €31 and €40	7%	2%
Between €41 and €50	14%	12%
Between €51 and €60	32%	22%
Between €61 and €70	16%	17%
Between €71 and €80	14%	8%
Between €81 and €90	4%	10%
Between €91 and €100	2%	11%
Between €101 and €200	5%	14%
Don't Know	3%	3%
MEAN SCORE	**€61.39**	**€74.75**

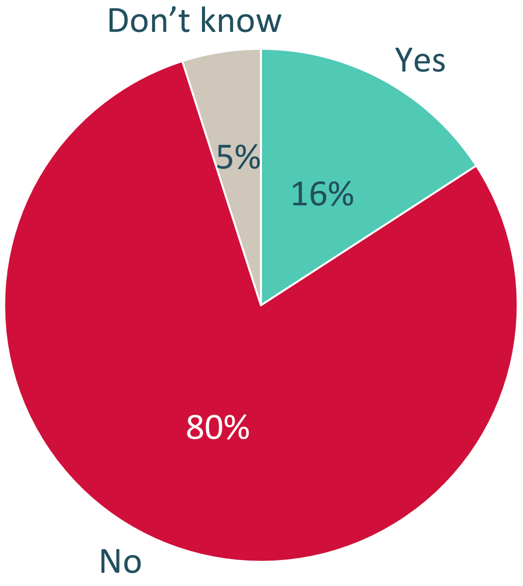
Those on Triple Play (fixed landline, broadband and TV) have a slightly larger than average bill, while those on Dual Play (landline and broadband) pay notably less at €61.39.

(Q.14)

Paying for additional Calls or Services

(Base: All telecoms decision makers with landline and using it; n = 438)

Q. Do you usually pay for additional calls or services outside your allowed minutes?



	Location			Age			
	Rural (n=147)	**Sub-Urban (n=216)**	**Urban (n=75)**	**18-34 (n=49*)**	**35-54 (n=148)**	**55+ (n=241)**	**Standalone LL (n=118)**
Yes	19%	15%	14%	2%	13%	20%	22%
No	78%	77%	84%	92%	82%	76%	74%
Don't Know	3%	8%	2%	6%	5%	5%	4%

***CAUTION: SMALL BASE SIZE**

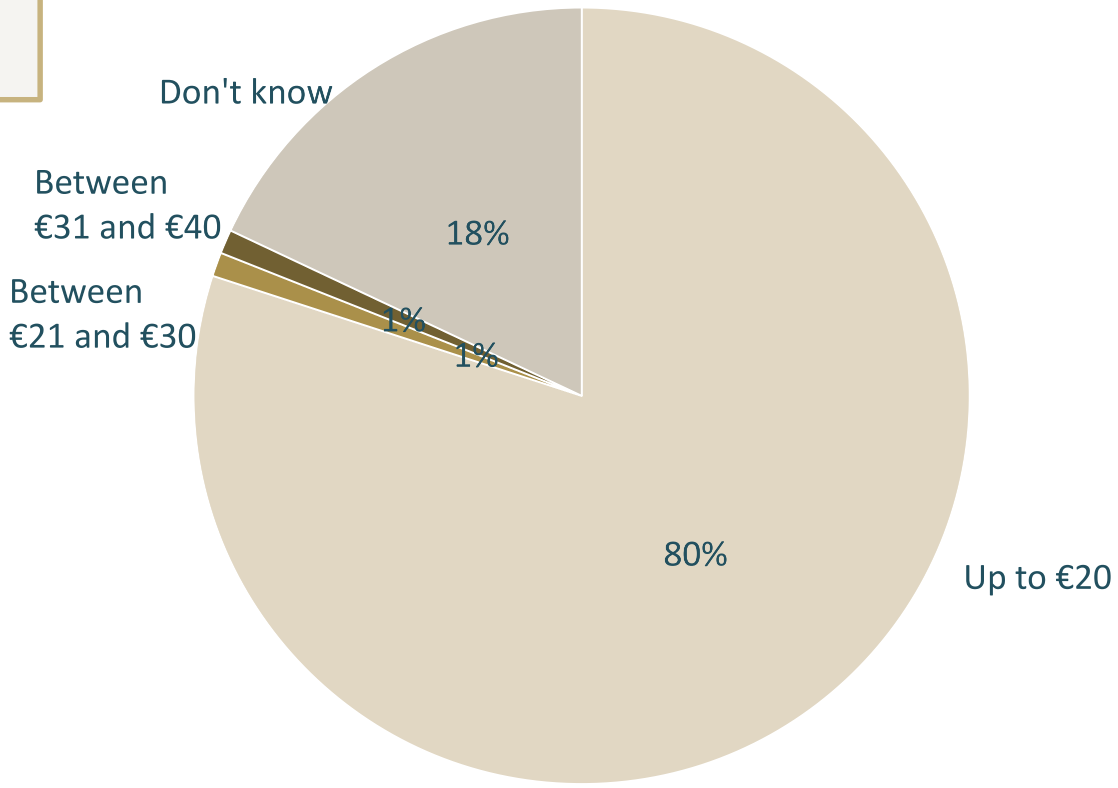
Only 16% of active landline users report that they usually pay for additional calls or services.

(Q.15)

Amount typically paid per Billing Period for additional Calls or Services

(Base: All telecoms decision makers using landline and usually pay for additional calls or services; n = 70)

Q. How much do you typically pay for calls and services outside your allowed minutes per billing period?



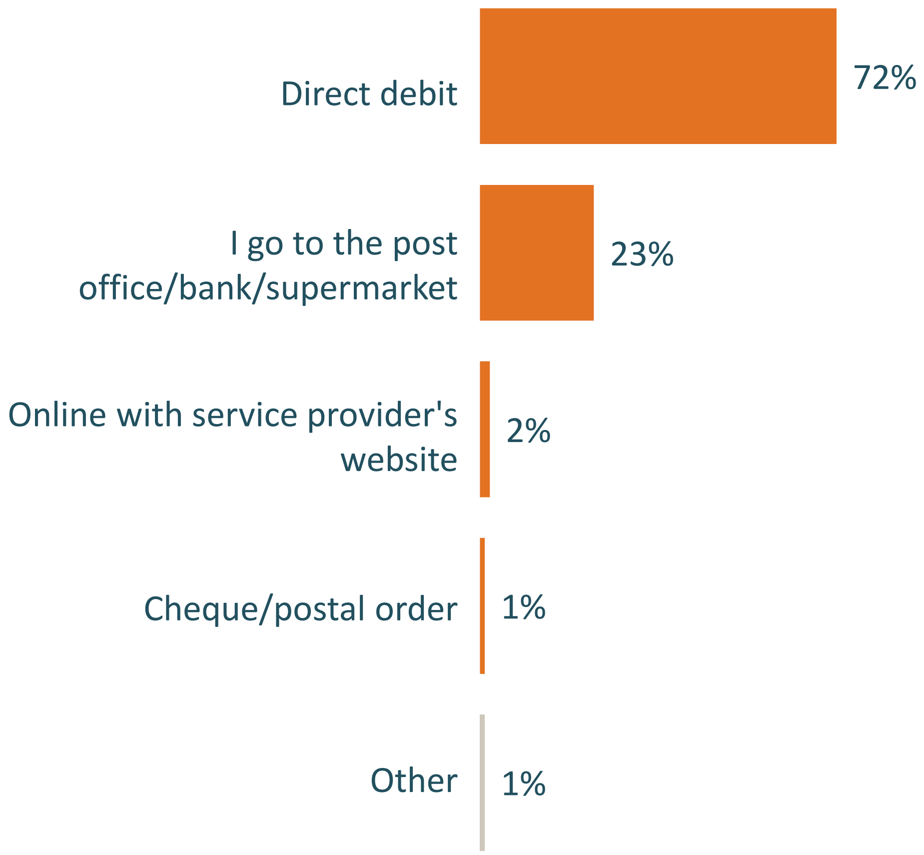
Where additional calls or services are being paid for, in most instances, the cost is no more than €20.

(Q.16)

Payment method used to pay Fixed Landline Bill

(Base: All telecoms decision makers using fixed landline; n = 690)

Q. Do you usually pay for additional calls or services outside your allowed minutes?



Location			Age			
Rural (n=237)	Sub-Urban (n=297)	Urban (n=156)	18-34 (n=84)	35-54 (n=210)	55+ (n=396)	Standalone LL (n=210)
62%	63%	82%	86%	84%	61%	48%
35%	30%	14%	9%	13%	34%	48%
1%	4%	2%	4%	2%	1%	*
2%	2%	1%	0%	1%	2%	3%
*	1%	1%	*	*	1%	1%

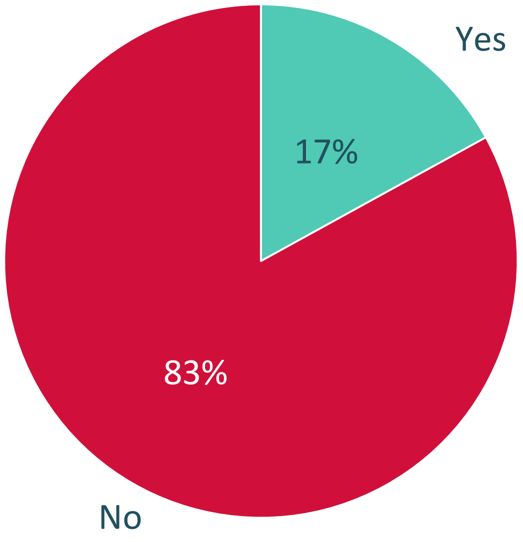
72% choose to pay fixed landline bill through direct debit – particularly those in urban areas and those aged 18-54. 23% go to post office/bank/supermarket to pay – more likely rural or sub-urban areas, those aged 55+, and standalone landline users.

(Q.17)

Rely on assistance to understand, or pay, Landline Bill

(Base: All telecoms decision makers using fixed landline, n = 690)

Q. Do you rely on assistance from friends or family members in order to understand or pay your fixed landline bill?



	Location			Age			
	Rural (n=237)	Sub-Urban (n=297)	Urban (n=156)	18-34 (n=84)	35-54 (n=210)	55+ (n=396)	Standalone LL (n=210)
Yes	8%	6%	27%	41%	9%	13%	15%
No	91%	94%	73%	58%	90%	87%	84%

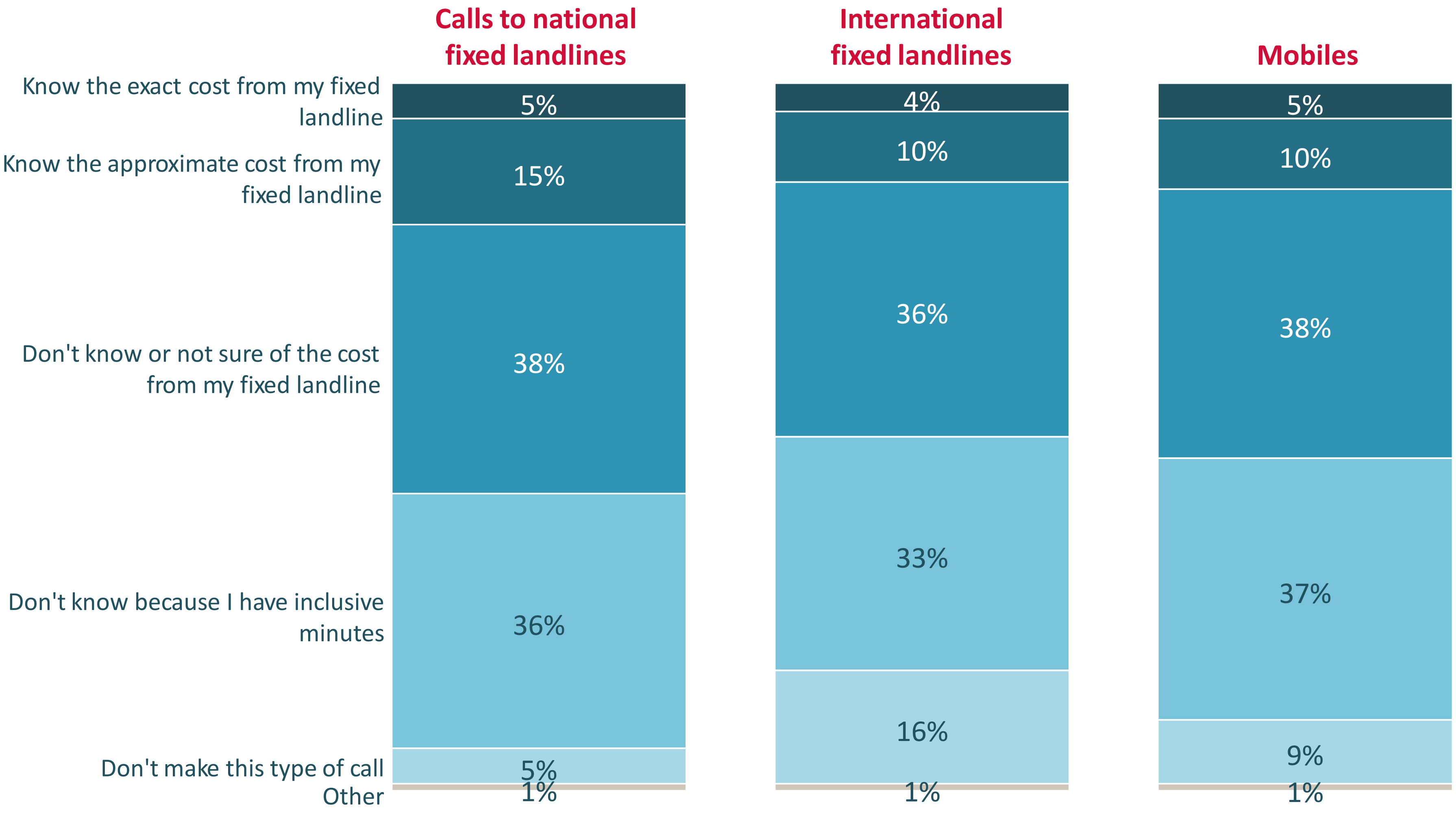
17% of landline customers rely on assistance to either understand or pay their landline bill – this is more likely among those in urban areas and aged under 35.

(Q.18)

Awareness of cost of making Landline Calls: Summary

(Base: All telecoms decision makers using fixed landline; n = 690)

Q. Could you state whether you know the cost of making calls from your fixed landline to each of these types of numbers in instances where you need to pay for the call?

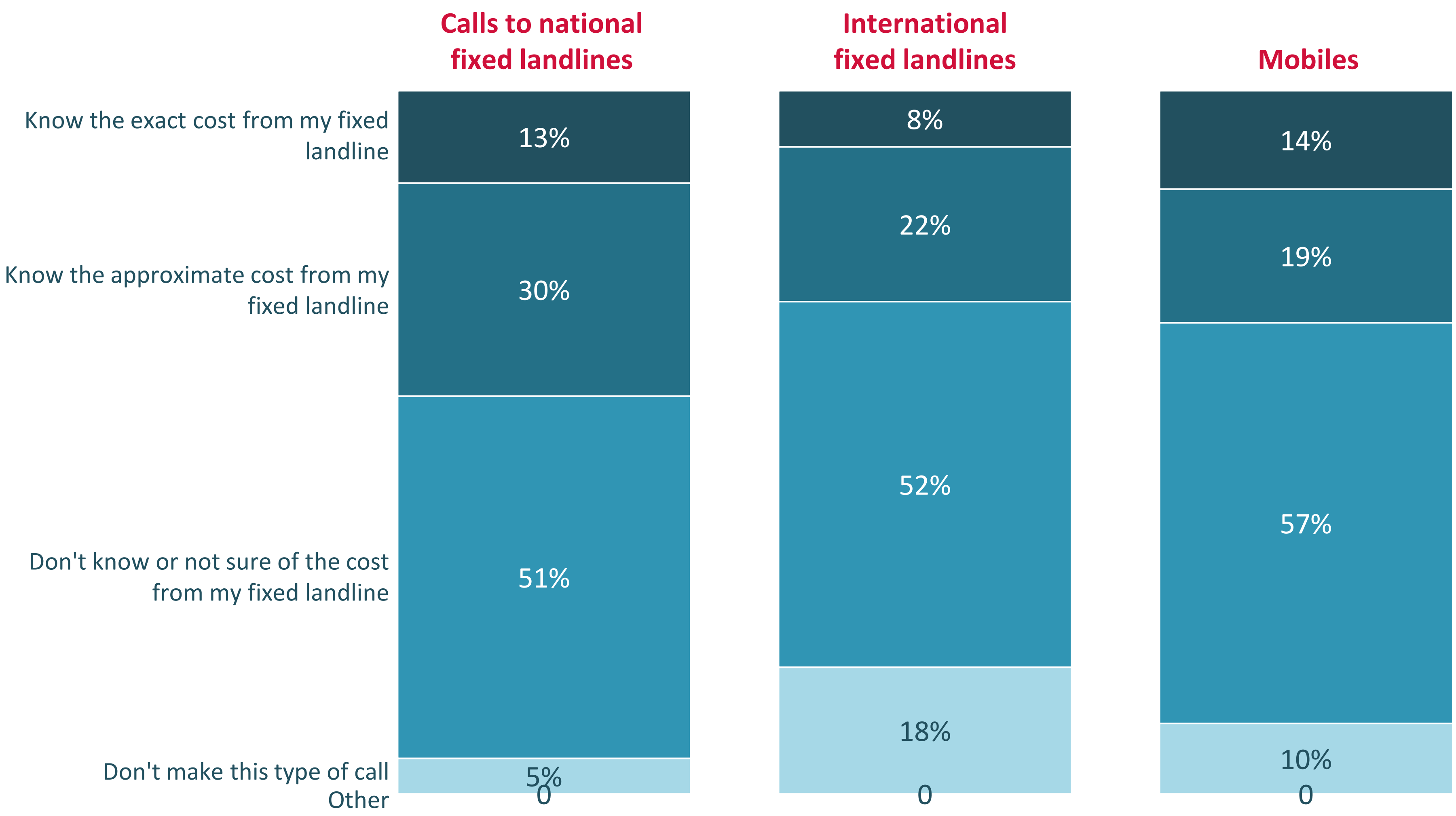


When probed, between 33% - 37% say they are unable to answer when asked about the cost of making calls due to having unlimited minutes depending on call type. However, even excluding these, the proportion who know the exact or approximate cost of calls is substantially lower than those who don't know or are not sure.

(Q.19)

Awareness of Landline Call Costs: Pay for Calls per Minute

(Base: All paying for calls on a per minute basis; n = 128)



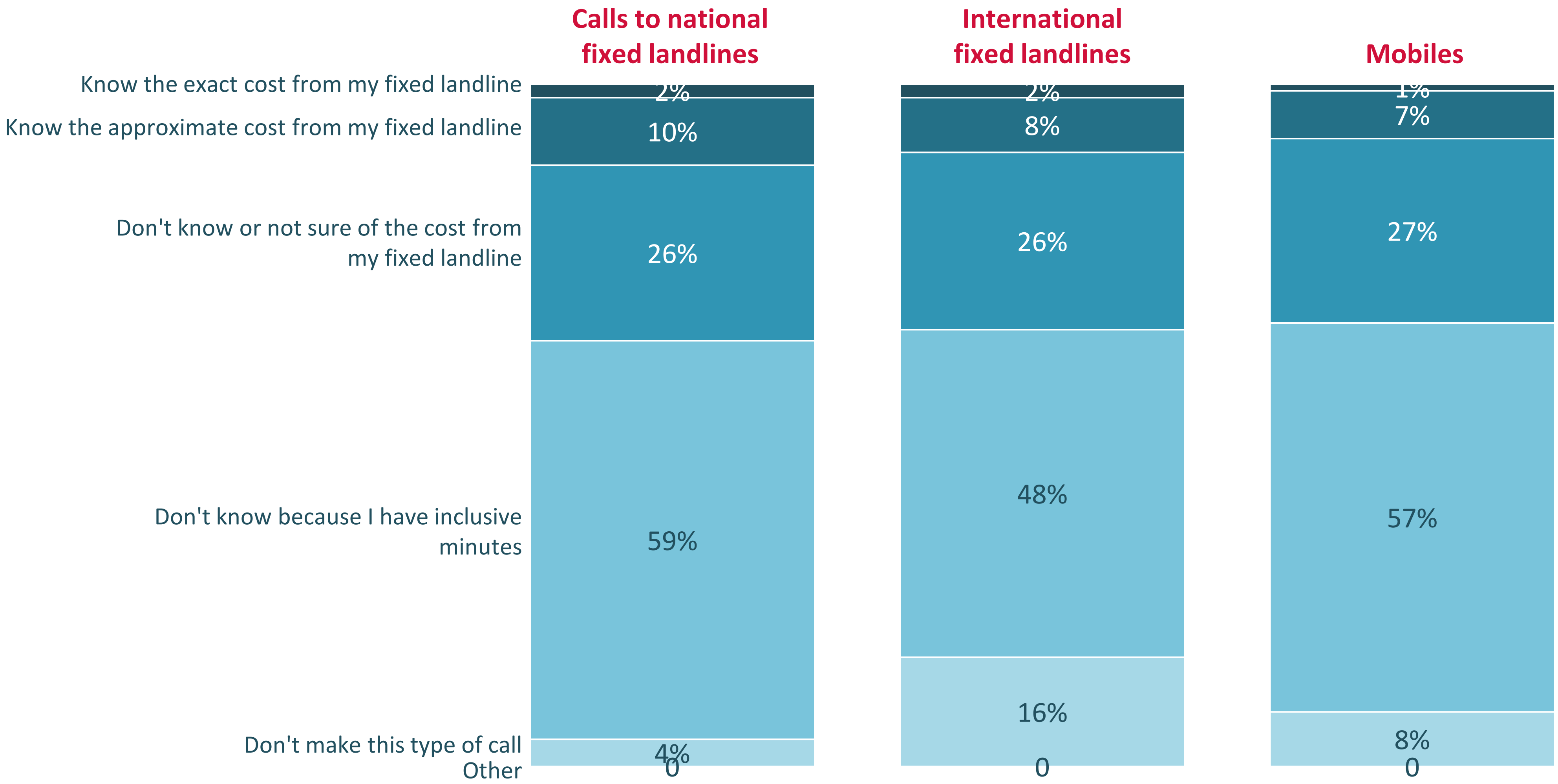
Q. Could you state whether you know the cost of making calls from your fixed landline to each of these types of numbers in instances where you need to pay for the call?

Awareness of the cost of making landline calls is higher among those that pay for calls on a per minute basis, however, there still remains a large proportion unaware of the cost of making these call types from their landline.

(Q.19)

Awareness of Landline Call Costs: Pay for Inclusive Minutes

(Base: All paying for inclusive minutes for calls; n = 483)



Q. Could you state whether you know the cost of making calls from your fixed landline to each of these types of numbers in instances where you need to pay for the call?

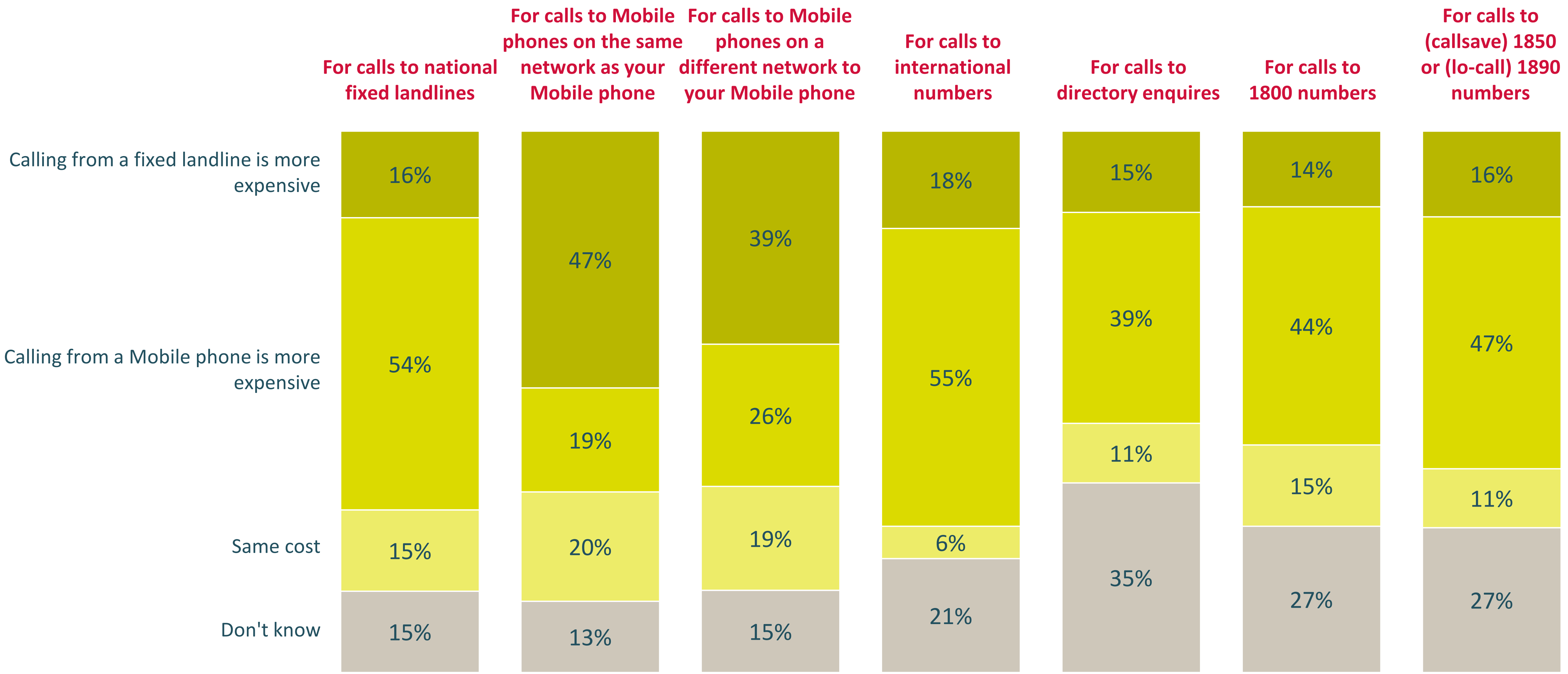
Knowledge of call costs is lowest among those that pay for inclusive minutes.

(Q.19)

Perception of Cost per Call Type

Q. Thinking about the cost of making different types of calls, could you tell me which type of phone – fixed landline or Mobile phone – is most expensive for making each of the following call types?

(Base: All telecoms decision makers who use fixed landline and own a mobile phone; n = 628)

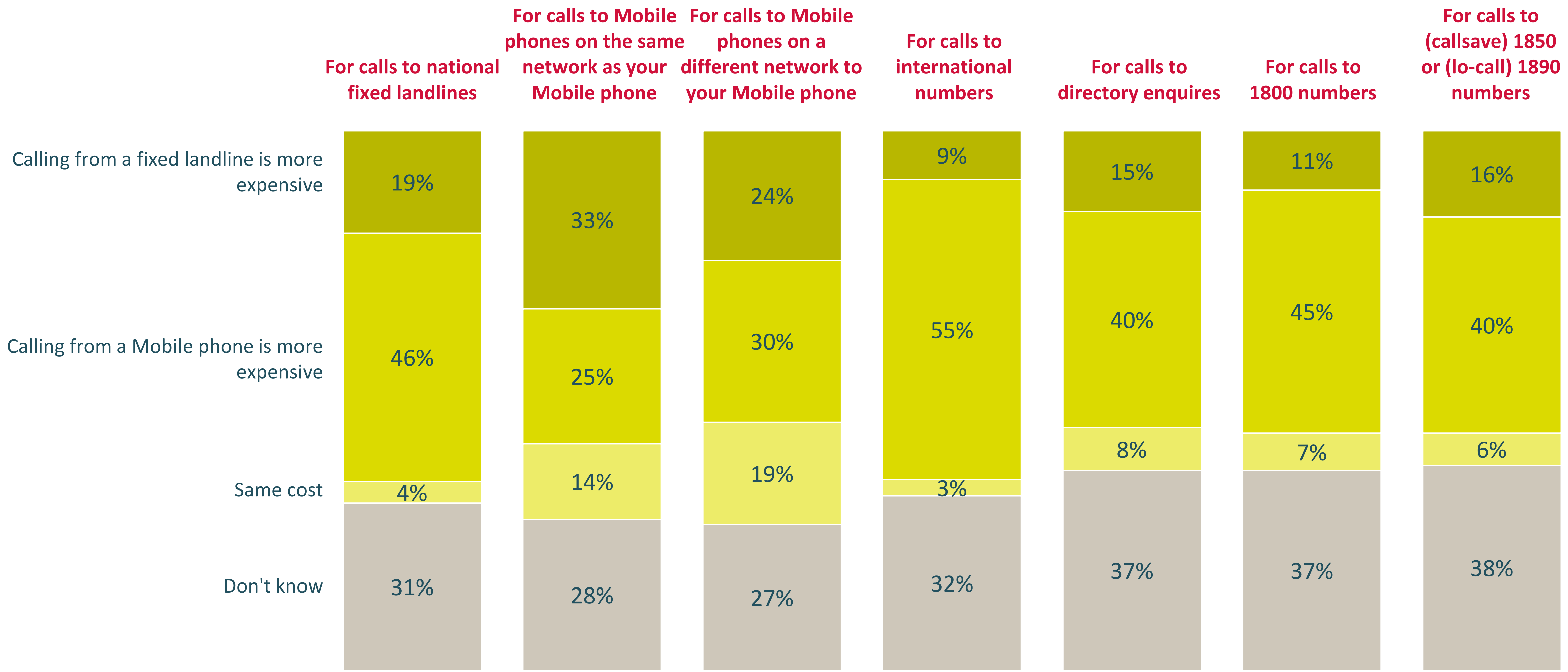


Mobile phone is perceived to be a more expensive way to call for each call type, with the exception of calls to other mobile phones. Notably, more than 10% don't know which is more expensive for each call type – rising to 35% saying don't know the cost of calls to Directory Enquiries.

(Q.20)

Perception of Cost per Call Type: Paying for Calls per Minute

(Base: All paying for calls on a per minute basis; n = 108)

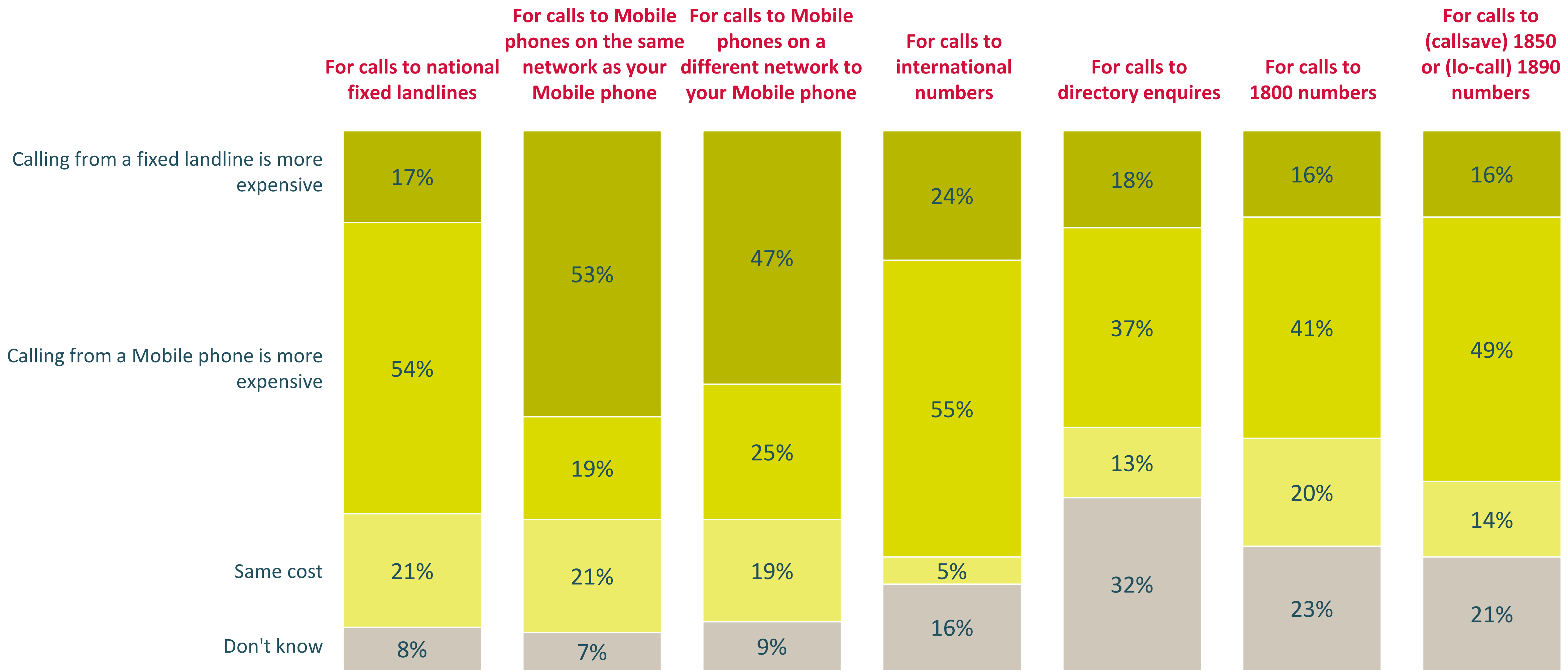


Similarly, among those that pay for calls on a per minute basis, there is a belief that calling from a mobile phone is more expensive for all call types, with the exception of calling mobile phones on the same network.

(Q.20)

Perception of Cost per Call Type: Paying for Inclusive Minutes

(Base: All paying for inclusive minutes for calls; n = 409)



Calls to mobile phones aside, landline is seen as less expensive for all call types among those that pay for inclusive minutes.

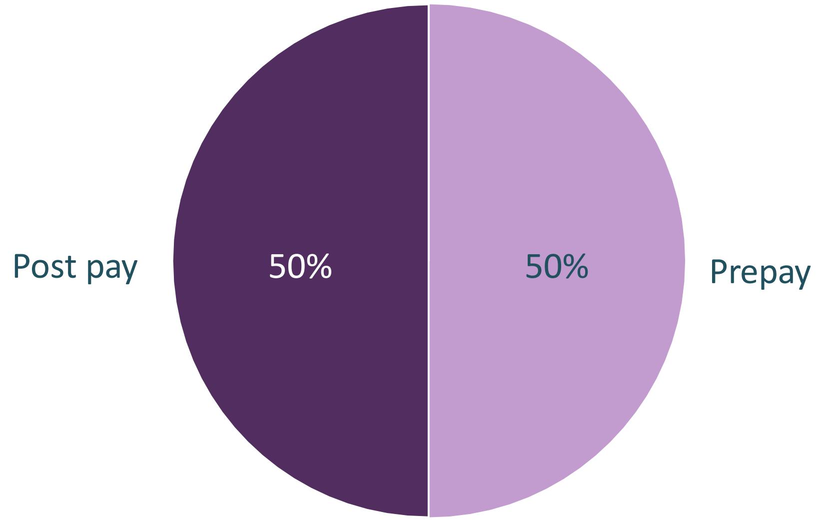
(Q.20)

Mobile Phone

Mobile Plan Type

(Base: All telecoms decision makers with mobile phone; n=1933)

Q. Thinking about your Mobile phone service, do you subscribe to a prepay or bill pay service for your main Mobile phone?



	Location			Age		
	Rural (n=708)	Sub-Urban (n=737)	Urban (n=488)	18-34 (n=476)	35-54 (n=855)	55+ (n=602)
Prepay	45%	44%	54%	58%	43%	52%
Post Pay	55%	55%	45%	42%	57%	47%
Don't know	*	*	*	*	*	1%

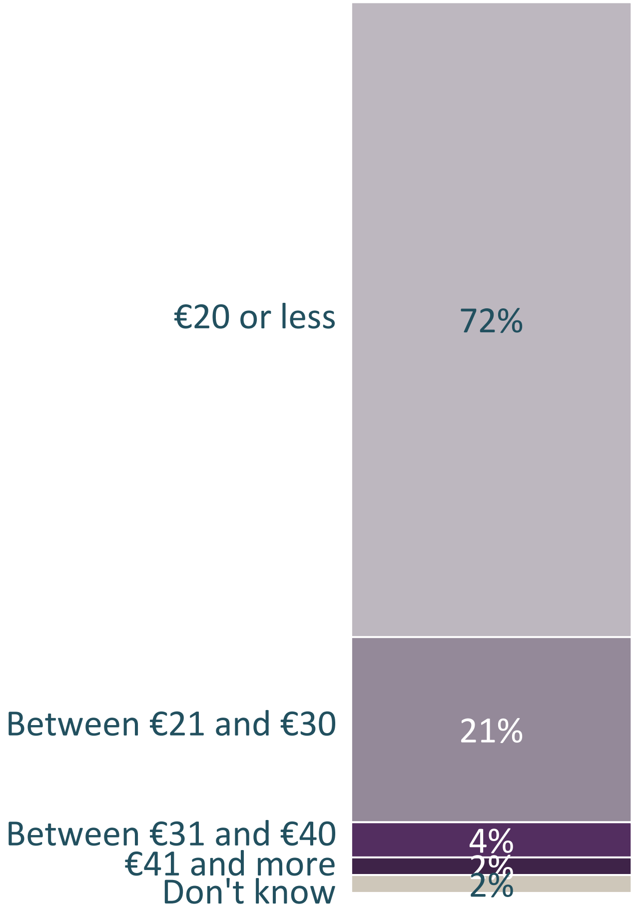
In terms of mobile phone plans – the sample is split evenly between Prepay and Postpay. Prepay is more likely among those in urban areas and aged under 35, while Postpay is more common among those aged 35-54.

(Q.21)

Monthly Mobile Prepay Spend

(Base: All telecoms decision makers with prepay mobile phone; n=922)

Q. How much do you typically spend on credit each month for your prepay Mobile phone?



MEAN SCORE €22.11

	Location			Age		
	Rural (n=319)	Sub-Urban (n=348)	Urban (n=255)	18-34 (n=253)	35-54 (n=344)	55+ (n=325)
€20 or less	77%	76%	68%	57%	73%	84%
Between €21 and €30	17%	20%	22%	30%	20%	13%
Between €31 and €40	4%	1%	4%	5%	5%	1%
€41 and more	1%	2%	3%	5%	2%	0%
Don't know	1%	1%	2%	3%	*	2%
MEAN SCORE	**€21.38**	**€21.60**	**€22.57**	**€24.68**	**€22.16**	**€19.85**

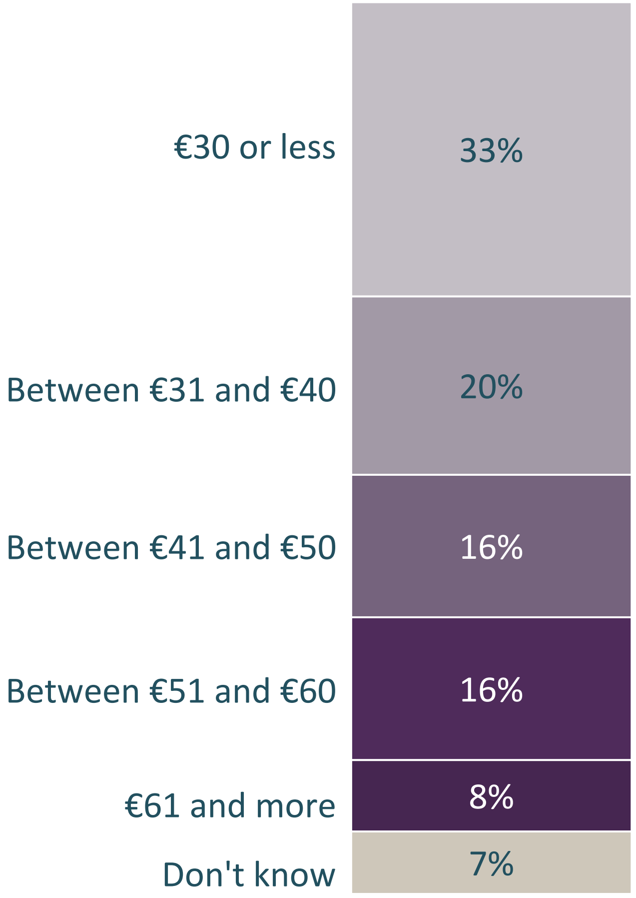
On average, Prepay spend is slightly over €22, but 72% of customers spend €20 or less per month. Those aged under 35 are most likely to pay more than average on a monthly basis, while those aged 55+ pay just under €20.

(Q.22a)

Monthly Mobile Postpay Spend

(Base: All telecoms decision makers with post-pay mobile phone; n = 1006)

Q. Typically, how much is your monthly mobile phone bill?



MEAN SCORE **€43.13**

	Location			Age		
	Rural (n=387)	Sub-Urban (n=387)	Urban (n=232)	18-34 (n=222)	35-54 (n=510)	55+ (n=274)
€30 or less	37%	32%	32%	30%	30%	43%
Between €31 and €40	20%	23%	18%	21%	20%	19%
Between €41 and €50	19%	14%	16%	18%	17%	14%
Between €51 and €60	14%	16%	16%	22%	18%	7%
€61 and more	6%	9%	9%	6%	8%	11%
Don't Know	4%	4%	9%	3%	8%	7%
MEAN SCORE	**€40.55**	**€42.02**	**€45.16**	**€42.51**	**€44.55**	**€41.13**

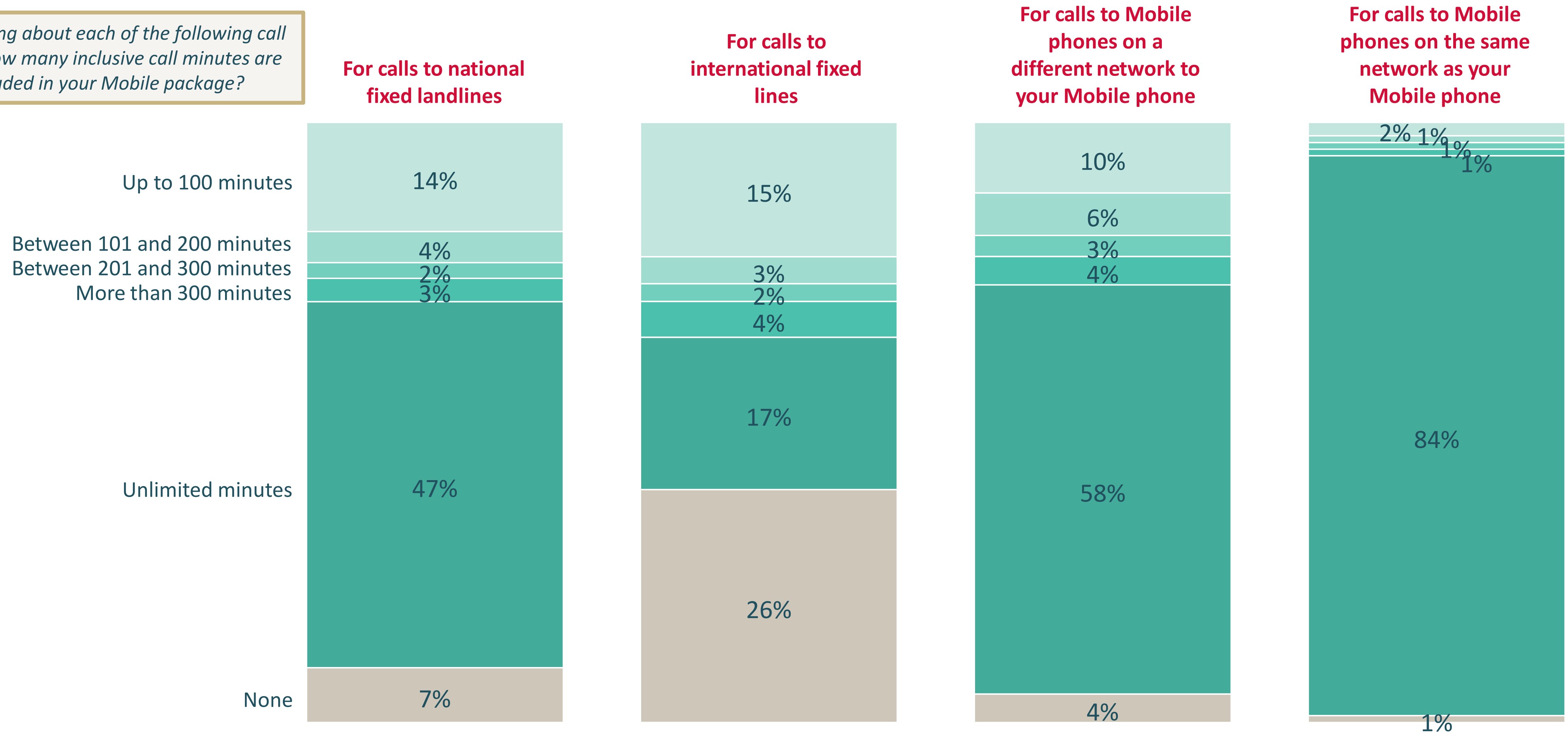
Mobile customers in the survey who are on a contract are paying just over €43 per month on average. This is slightly higher among those in urban areas and among those aged 35-54.

(Q.22b)

Awareness of Inclusive Call Minutes for Mobile Phone Call Types

(Base: All telecoms decision makers with mobile phone; n = 1933)

Q. Thinking about each of the following call types, how many inclusive call minutes are included in your Mobile package?

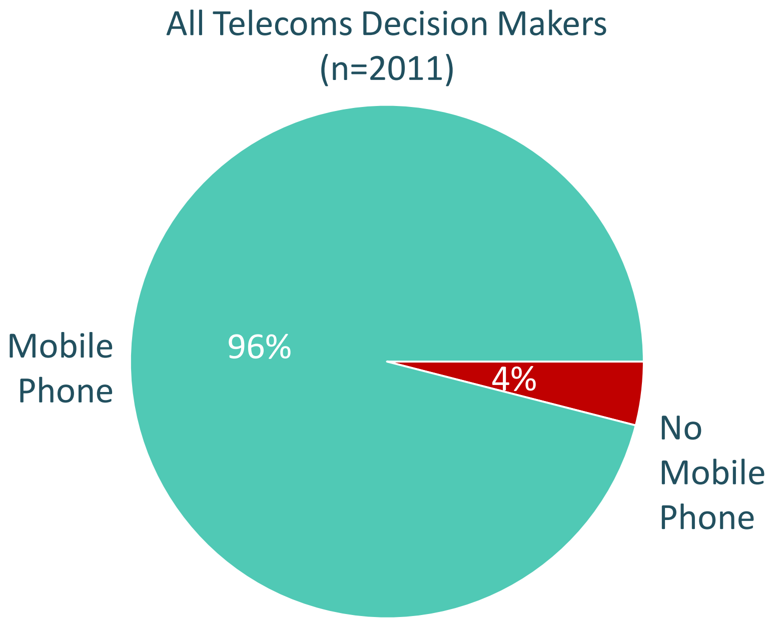


84% report having unlimited inclusive minutes for calls to mobile phones on the same network, with 58% reporting inclusive minutes for calls to mobile phones on other networks. 17% report unlimited minutes for calls to international fixed lines, but a higher proportion (26%) say they have no inclusive minutes for this call type.

(Q.23)

Mobile Phone Ownership?

(Base: All Telecoms Decision Makers; n=2011)



<u>Who doesn't have mobile phone</u>?

Primarily those aged 65+

Those who have Standalone Landline

Of those without a mobile phone, 68% of these are aged 65 or older.

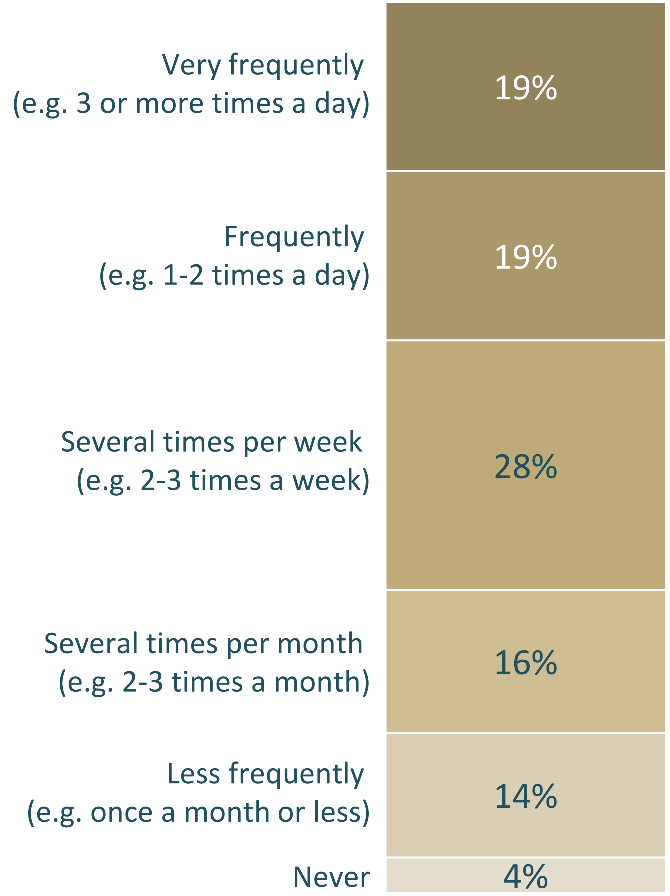
(Q.2b)

Frequency of making/receiving various call types

Frequency of making Landline Calls

Q. How often do you use your fixed landline for making calls? If you have more than one fixed landline in your home, just think about the one you use most often.

(Base: All telecoms decision makers who use fixed landline telephone for making/receiving calls; n=690)



NET DAILY **37%**

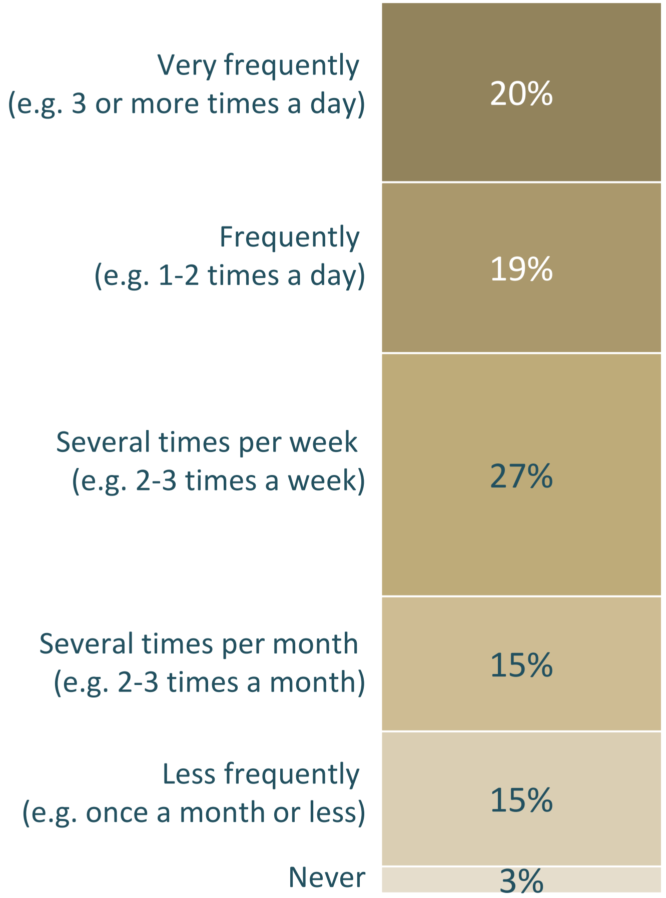
	Location			Age			
	Rural (n=237)	**Sub-Urban (n=297)**	**Urban (n=156)**	**18-34 (n=84)**	**35-54 (n=210)**	**55+ (n=396)**	**Standalone LL (n=210)**
Very frequently (e.g. 3 or more times a day)	27%	20%	14%	15%	22%	18%	23%
Frequently (e.g. 1-2 times a day)	23%	24%	14%	10%	18%	22%	17%
Several times per week (e.g. 2-3 times a week)	30%	30%	27%	6%	23%	38%	37%
Several times per month (e.g. 2-3 times a month)	7%	9%	24%	24%	21%	10%	6%
Less frequently (e.g. once a month or less)	11%	14%	16%	30%	13%	10%	12%
Never	3%	2%	6%	14%	4%	1%	4%
NET DAILY	**50%**	**45%**	**28%**	**25%**	**40%**	**40%**	**40%**

Daily frequency of making landline calls stands at 37% and is higher among those in rural and sub-urban areas.

Frequency of receiving Landline Calls

Q. How often do you use your fixed landline for receiving calls?

(Base: All telecoms decision makers who use fixed landline telephone for making/receiving calls; n=690)



NET DAILY **39%**

	Location			Age			
	Rural (n=237)	Sub-Urban (n=297)	Urban (n=156)	18-34 (n=84)	35-54 (n=210)	55+ (n=396)	Standalone LL (n=210)
Very frequently (e.g. 3 or more times a day)	28%	21%	17%	14%	27%	19%	27%
Frequently (e.g. 1-2 times a day)	24%	27%	11%	7%	14%	24%	19%
Several times per week (e.g. 2-3 times a week)	28%	29%	27%	17%	21%	34%	28%
Several times per month (e.g. 2-3 times a month)	8%	9%	22%	18%	14%	15%	14%
Less frequently (e.g. once a month or less)	10%	13%	19%	35%	20%	7%	7%
Never	2%	1%	5%	9%	4%	1%	5%
NET DAILY	**52%**	**48%**	**28%**	**21%**	**41%**	**43%**	**46%**

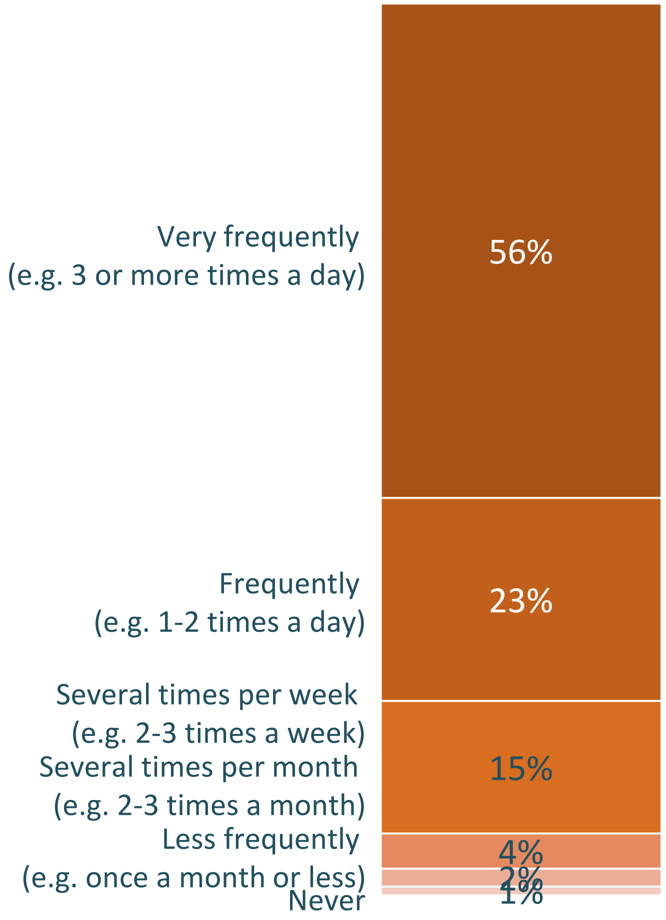
Frequency of receiving landline calls on a daily basis stands at 39% – higher in rural and sub-urban locations, as well as among those with a standalone landline

(Q.25)

Frequency of making Mobile Calls at Home

Q. How often do you use your Mobile phone in your home for making calls?

(Base: All telecoms decision makers who own a mobile phone; n = 1933)



NET DAILY **79%**

	Location			Age		
	Rural (n=708)	**Sub-Urban (n=737)**	**Urban (n=488)**	**18-34 (n=476)**	**35-54 (n=855)**	**55+ (n=602)**
Very frequently (e.g. 3 or more times a day)	58%	57%	55%	68%	59%	42%
Frequently (e.g. 1-2 times a day)	22%	23%	23%	21%	21%	26%
Several times per week (e.g. 2-3 times a week)	13%	13%	17%	8%	15%	21%
Several times per month (e.g. 2-3 times a month)	4%	4%	3%	2%	2%	7%
Less frequently (e.g. once a month or less)	3%	2%	2%	1%	2%	3%
Never	*	1%	1%	2%	1%	*
NET DAILY	**80%**	**81%**	**77%**	**88%**	**80%**	**68%**

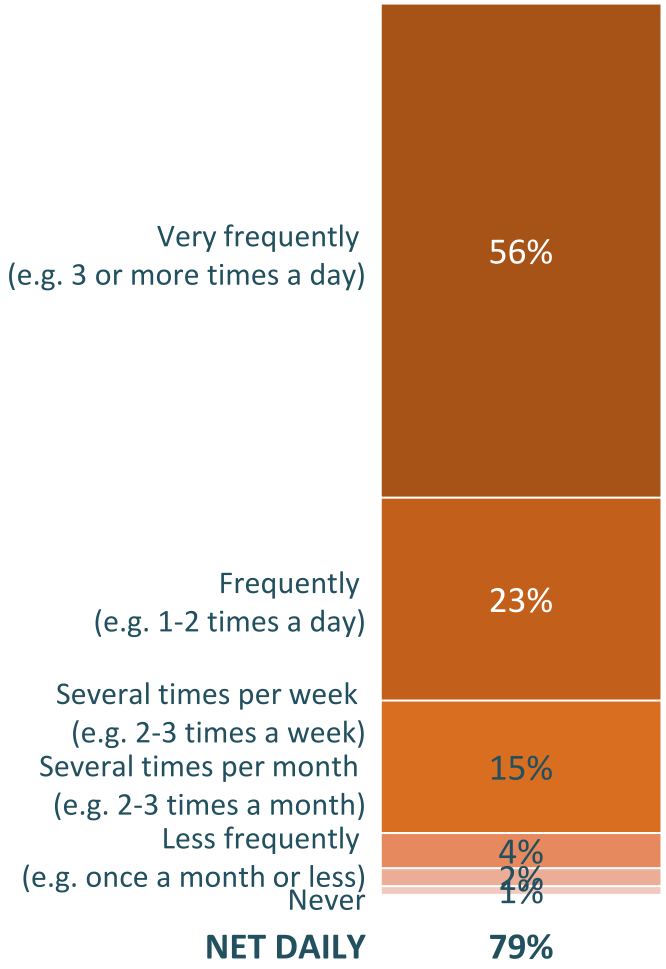
Almost 4 in 5 (79%) mobile phone owners in the survey make calls from their mobile phone at home on a daily basis – more prevalent among those aged under 35, while older age groups (55+) make calls several times a week rather than on a daily basis.

(Q.26)

Frequency of making Mobile Calls at Home

Q. How often do you use your Mobile phone in your home for making calls?

(Base: All telecoms decision makers who own a mobile phone; n = 1933)



	Standalone LL (n=200)	Active LL users (n=628)	Non-Active LL Users (n=303)
Very frequently (e.g. 3 or more times a day)	49%	49%	63%
Frequently (e.g. 1-2 times a day)	19%	21%	22%
Several times per week (e.g. 2-3 times a week)	14%	15%	15%
Several times per month (e.g. 2-3 times a month)	8%	8%	*
Less frequently (e.g. once a month or less)	6%	5%	0%
Never	4%	2%	*
NET DAILY	**67%**	**70%**	**85%**

Those who pay for landline, but are not active users, are slightly more likely than average to make mobile calls at home on a daily basis.

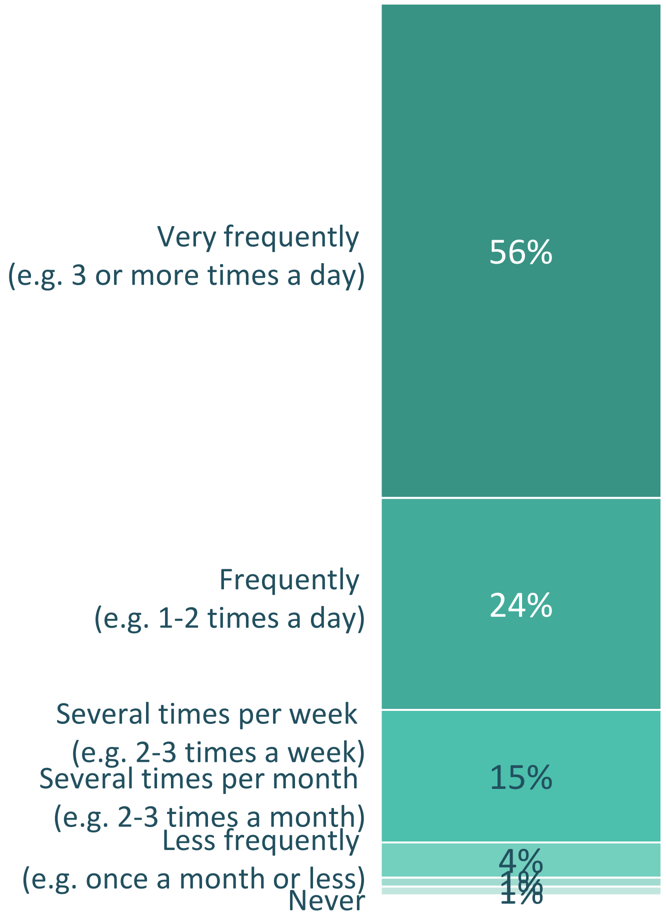
(Q.26)

REDC

Frequency of receiving Mobile Calls at Home

Q. And how often do you use your Mobile phone in your home for receiving calls?

(Base: All telecoms decision makers who own a mobile phone; n = 1933)



NET DAILY **80%**

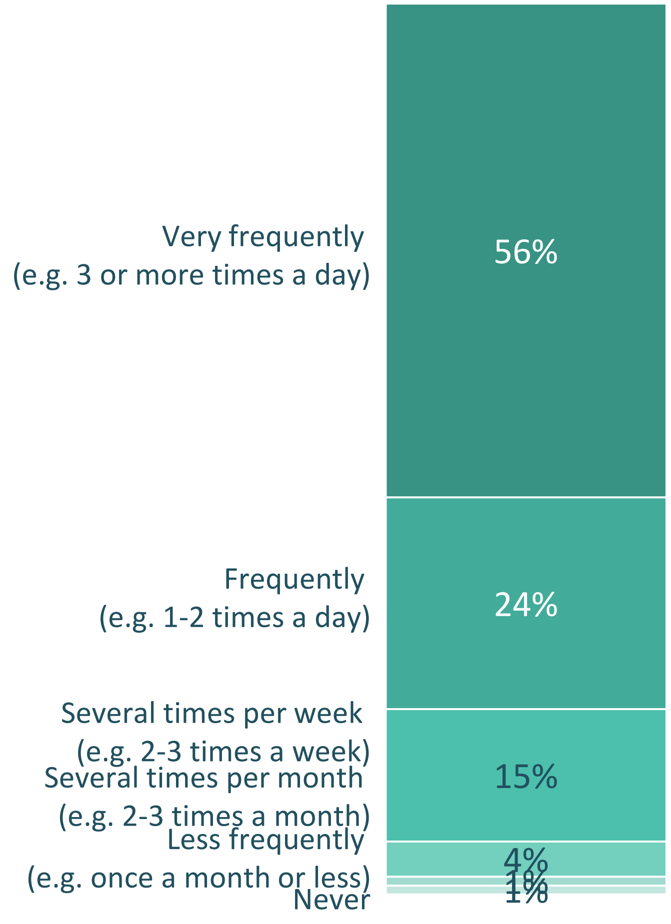
	Location			Age		
	Rural (n=708)	**Sub-Urban (n=737)**	**Urban (n=488)**	**18-34 (n=476)**	**35-54 (n=855)**	**55+ (n=602)**
Very frequently (e.g. 3 or more times a day)	59%	57%	53%	66%	59%	42%
Frequently (e.g. 1-2 times a day)	22%	25%	25%	21%	24%	27%
Several times per week (e.g. 2-3 times a week)	13%	13%	17%	9%	14%	21%
Several times per month (e.g. 2-3 times a month)	4%	3%	4%	1%	3%	6%
Less frequently (e.g. once a month or less)	2%	1%	1%	1%	*	3%
Never	*	*	1%	2%	*	*
NET DAILY	**80%**	**83%**	**78%**	**88%**	**82%**	**69%**

80% of mobile phone owners receive mobile calls at home on a daily basis – significantly higher among those aged under 35.

Frequency of receiving Mobile Calls at Home

Q. And how often do you use your Mobile phone in your home for receiving calls?

(Base: All telecoms decision makers who own a mobile phone; n = 1933)



NET DAILY **80%**

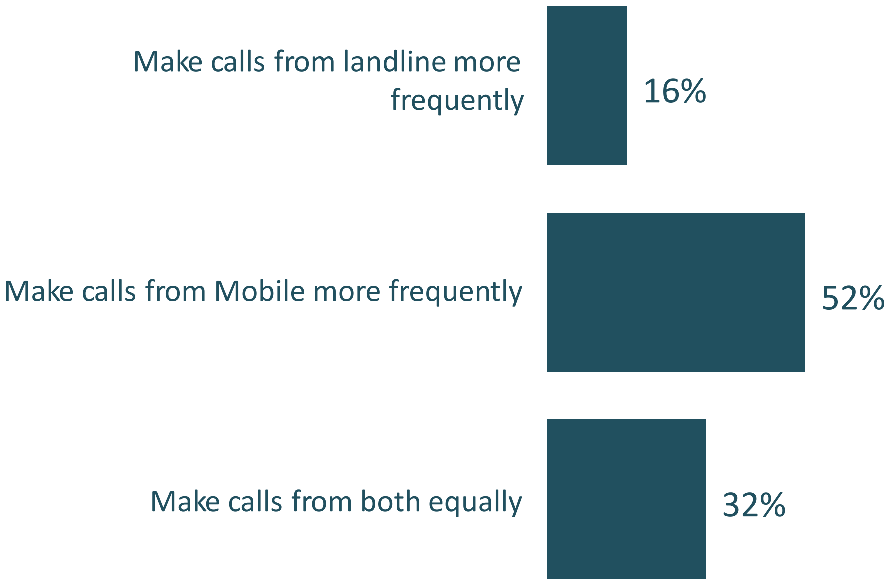
	Standalone LL (n=200)	Active LL users (n=628)	Non-Active LL Users (n=303)
Very frequently (e.g. 3 or more times a day)	49%	49%	60%
Frequently (e.g. 1-2 times a day)	18%	22%	25%
Several times per week (e.g. 2-3 times a week)	17%	16%	14%
Several times per month (e.g. 2-3 times a month)	6%	8%	1%
Less frequently (e.g. once a month or less)	6%	4%	*
Never	4%	2%	*
NET DAILY	**68%**	**71%**	**85%**

Those paying for landline, but not using it, are slightly more likely than average to receive mobile calls at home on a daily basis.

(Q.27)

Landline vs Mobile – Making Calls

(Base: All telecoms decision makers who own both a landline and a mobile phone; n=627)



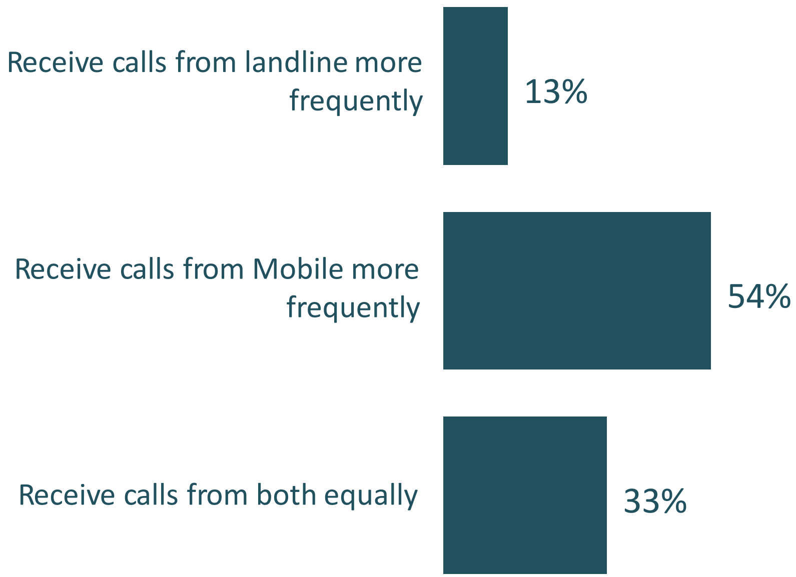
Location			Age			
Rural (n=222)	Sub-Urban (n=266)	Urban (n=139)	18-34 (n=81)	35-54 (n=210)	55+ (n=336)	Standalone LL (n=161)
24%	20%	10%	3%	12%	23%	23%
43%	48%	58%	68%	52%	46%	47%
33%	32%	32%	29%	36%	31%	29%

Among those with both landline and mobile phone, 52% say they use mobile phone more frequently for making calls, with 32% saying they use both landline and mobile phone equally.

(Q.24/ 25/ 26/ 27)

Landline vs Mobile – Receiving Calls

(Base: All telecoms decision makers who own both a landline and a mobile phone; n=627)



Location			Age			
Rural (n=222)	Sub-Urban (n=266)	Urban (n=139)	18-34 (n=81)	35-54 (n=210)	55+ (n=336)	Standalone LL (n=161)
25%	16%	6%	2%	6%	21%	19%
43%	49%	61%	73%	56%	46%	42%
32%	35%	33%	25%	37%	33%	38%

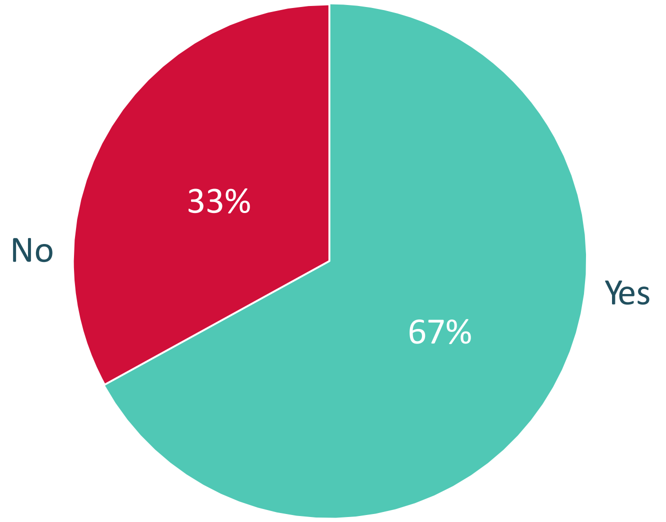
Among those with both landline and mobile phone, 54% say they use mobile phone more frequently for receiving calls, with 33% saying they use both landline and mobile phone equally.

Unmanaged VoIP usage

Usage of Unmanaged VoIP at Home

(Base: All telecoms decision makers with fixed broadband; n = 1307)

Q. Do you make or receive calls on Skype, WhatsApp, Viber, Snapchat, Facetime, or similar platforms in your home from a computer, laptop, tablet, or Mobile smart phone using your home broadband connection?



	Location			Age		
	Rural (n=463)	Sub-Urban (n=477)	Urban (n=367)	18-34 (n=315)	35-54 (n=624)	55+ (n=368)
Yes	62%	63%	71%	85%	70%	47%
No	38%	37%	29%	15%	30%	53%

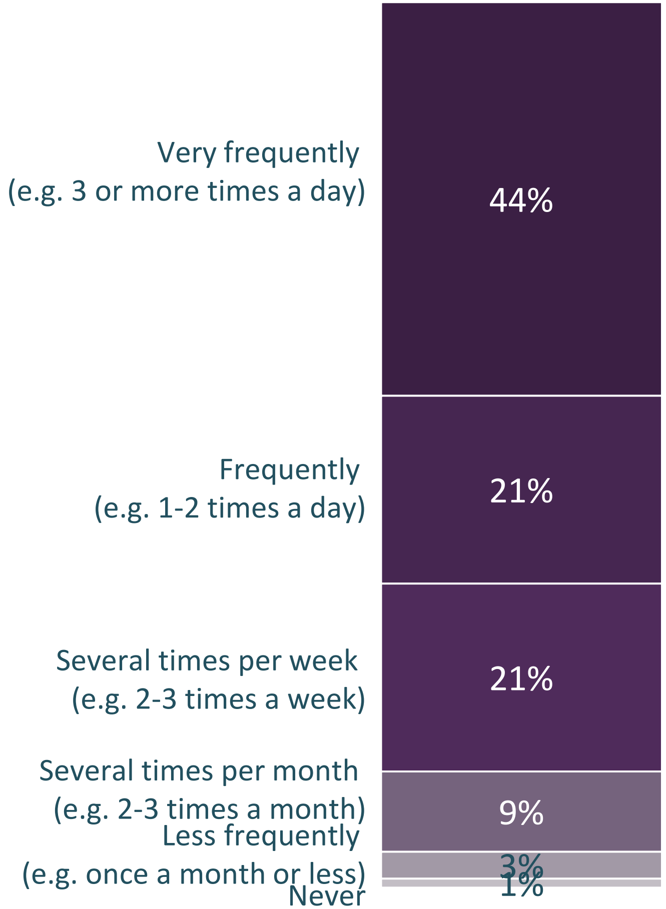
67% of those surveyed with fixed broadband use Unmanaged VoIP at home – higher among those aged under 35.

(Q.28)

Frequency of using Unmanaged VoIP at Home

Q. And how often do you use Skype, WhatsApp calls, Viber, Snapchat calls, Facetime, or similar platforms for calls in your home?

(Base: All telecoms decision makers who use Unmanaged VoIP services at home; n = 899)



NET DAILY **66%**

	Location			Age		
	Rural (n=303)	**Sub-Urban (n=335)**	**Urban (n=261)**	**18-34 (n=270)**	**35-54 (n=460)**	**55+ (n=169)**
Very frequently (e.g. 3 or more times a day)	44%	38%	46%	56%	43%	27%
Frequently (e.g. 1-2 times a day)	22%	27%	19%	22%	21%	21%
Several times per week (e.g. 2-3 times a week)	19%	19%	23%	12%	24%	30%
Several times per month (e.g. 2-3 times a month)	9%	10%	8%	6%	8%	13%
Less frequently (e.g. once a month or less)	5%	5%	2%	4%	3%	5%
Never	*	1%	1%	0%	1%	2%
NET DAILY	**66%**	**65%**	**66%**	**78%**	**64%**	**48%**

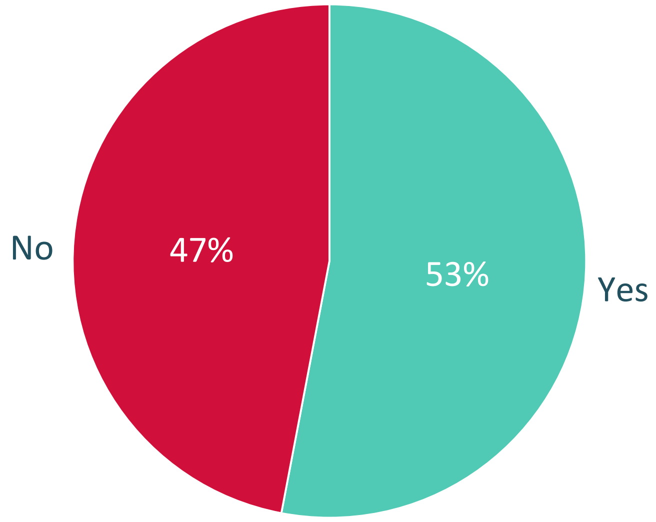
Daily usage of Unmanaged VoIP at home stands at 66% - significantly higher among those aged 18-34.

(Q.29)

Usage of Unmanaged VoIP outside the Home

(Base: All telecoms decision makers; n=2011)

Q. Do you make or receive calls on Skype, WhatsApp, Viber, Snapchat, Facetime, or similar platforms outside your home on a computer, laptop, tablet, or Mobile smart phone?



	Location			Age		
	Rural (n=730)	Sub-Urban (n=772)	Urban (n=509)	18-34 (n=481)	35-54 (n=860)	55+ (n=670)
Yes	44%	48%	59%	79%	57%	29%
No	56%	52%	41%	21%	43%	71%

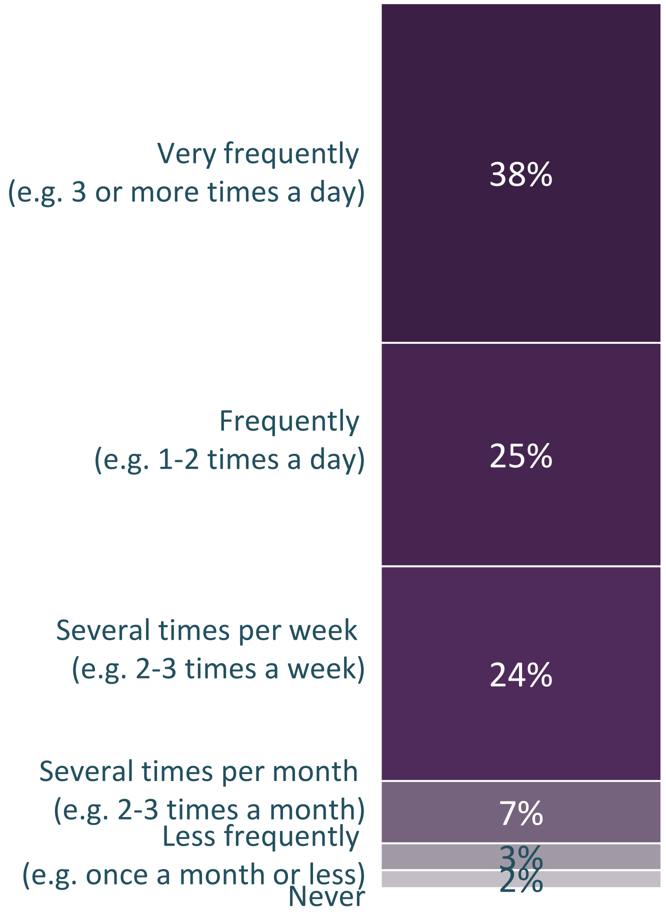
53% of telecoms decision makers use Unmanaged VoIP outside of the home – this is more prevalent among those in urban areas and aged 18-34.

(Q.30)

Frequency of using Unmanaged VoIP outside of the Home

(Base: All telecoms decision makers who use Unmanaged VoIP services outside home; n = 1059)

Q. And how often do you use Skype, WhatsApp calls, Viber, Snapchat calls, Facetime, or similar platforms for calls outside your home?



NET DAILY **64%**

	Location			Age		
	Rural (n=342)	Sub-Urban (n=421)	Urban (n=296)	18-34 (n=379)	35-54 (n=497)	55+ (n=183)
Very frequently (e.g. 3 or more times a day)	41%	33%	40%	44%	39%	26%
Frequently (e.g. 1-2 times a day)	24%	29%	24%	26%	23%	30%
Several times per week (e.g. 2-3 times a week)	21%	24%	26%	19%	27%	29%
Several times per month (e.g. 2-3 times a month)	10%	10%	6%	8%	7%	9%
Less frequently (e.g. once a month or less)	3%	3%	3%	2%	2%	6%
Never	2%	1%	2%	1%	2%	1%
NET DAILY	**64%**	**62%**	**64%**	**70%**	**62%**	**56%**

64% of those who use Unmanaged VoIP outside of the home, do so on a daily basis – this is higher among younger cohorts.

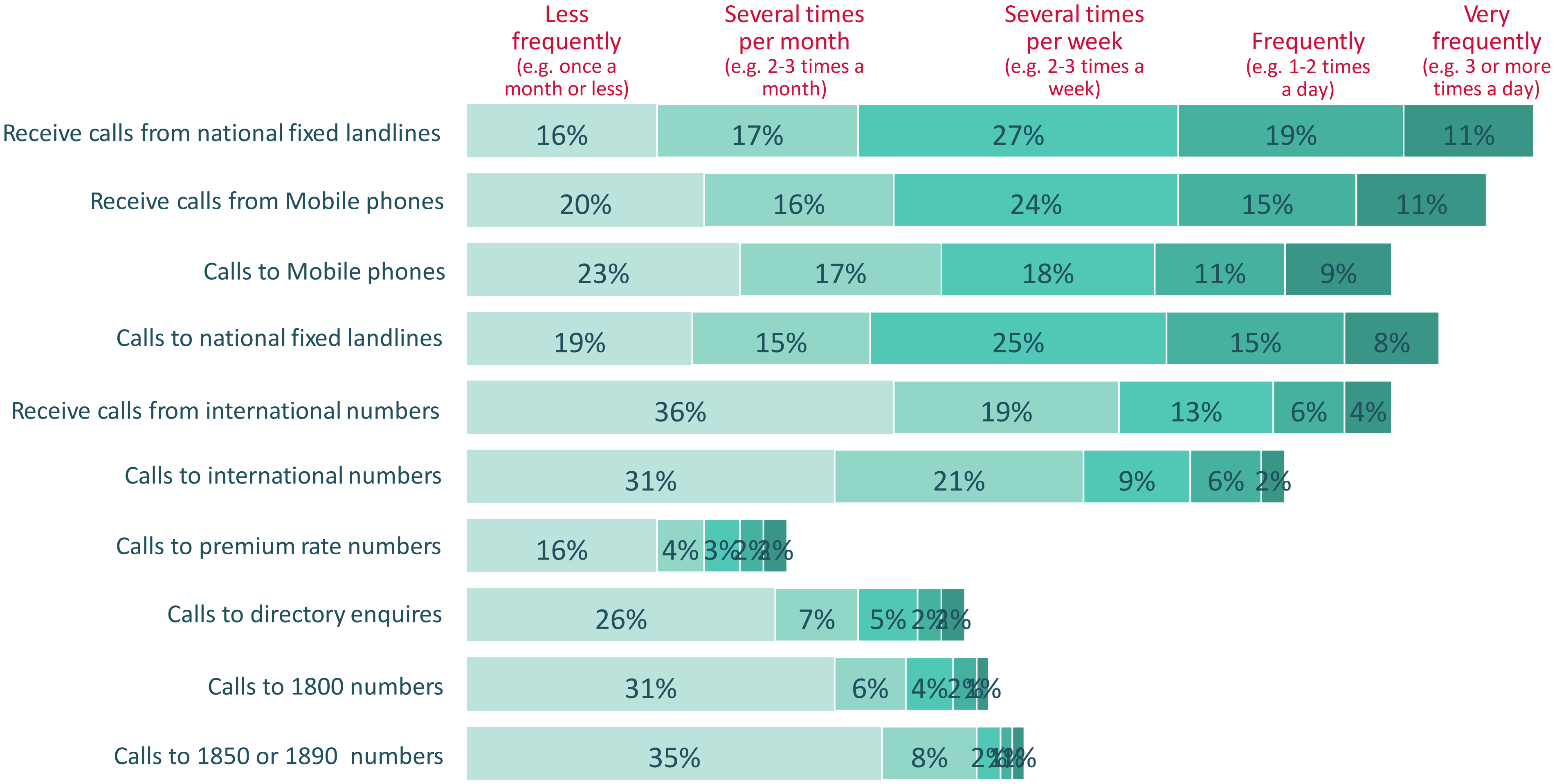
(Q.31)

Landline Call Behaviour

Frequency of using Landline for different purposes: Summary

(Base: All telecoms decision makers using fixed landline telephone; n = 690)

Q. Please indicate how frequently the fixed landline in your home is used for the following purposes?



	Never	Don't know	NET: Daily
Receive calls from national fixed landlines	8%	3%	**30%**
Receive calls from Mobile phones	9%	4%	**26%**
Calls to Mobile phones	21%	2%	**20%**
Calls to national fixed landlines	14%	3%	**24%**
Receive calls from international numbers	20%	2%	**10%**
Calls to international numbers	29%	3%	**7%**
Calls to premium rate numbers	64%	8%	**4%**
Calls to directory enquires	51%	7%	**4%**
Calls to 1800 numbers	48%	8%	**3%**
Calls to 1850 or 1890 numbers	47%	7%	**1%**

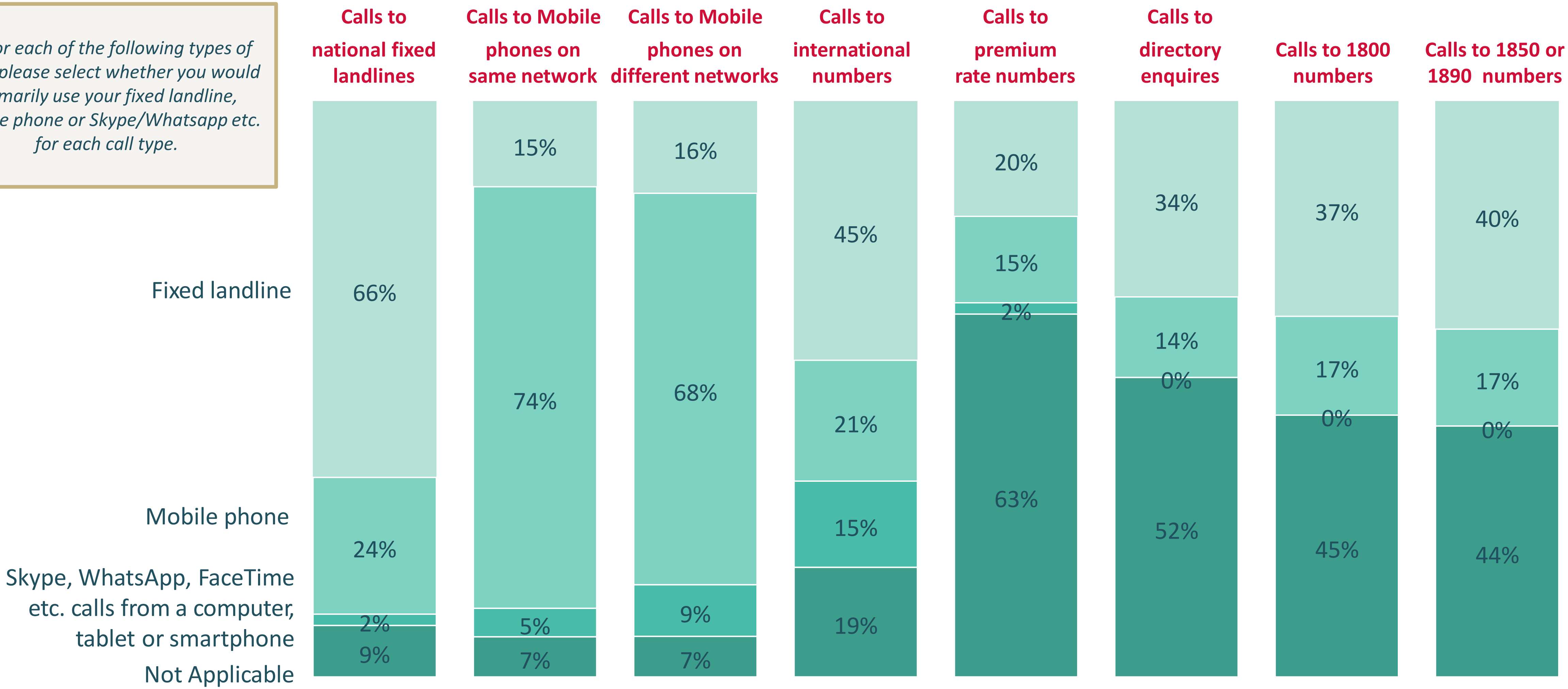
Most prevalent uses of landline are to receive calls from national fixed landlines (30% daily) and receive calls from mobile phones (26% daily).

(Q.32)

Primary Method of making Calls: Summary

(Base: All telecoms decision makers using fixed landline telephone; n = 690)

Q. For each of the following types of calls, please select whether you would primarily use your fixed landline, Mobile phone or Skype/Whatsapp etc. for each call type.



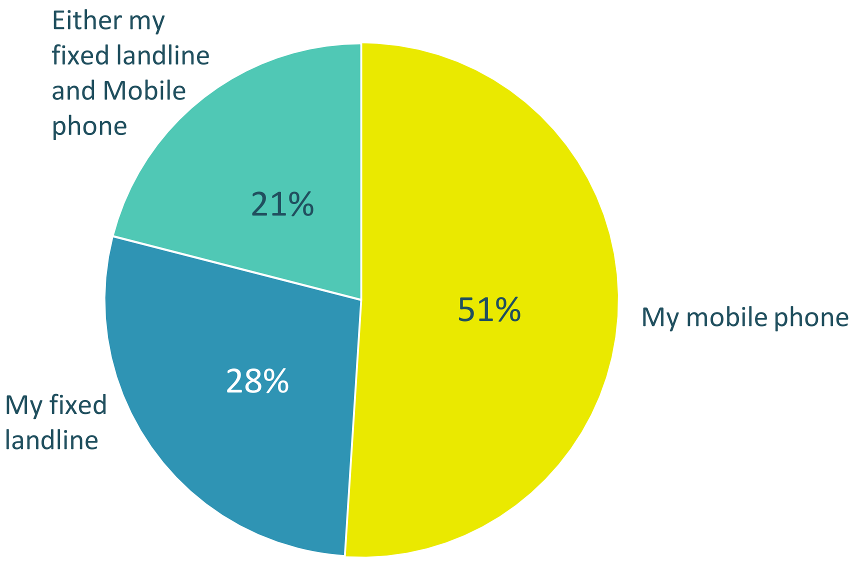
Among landline users, landline is used most often for calls to other fixed lines and to international numbers.

(Q.33)

How Friends and Family call you at Home

(Base: All telecoms decision makers using fixed landline telephone; n=690)

Q. When friends or family members call you at home, what phone do they typically contact you on?



	Location			Age			
	Rural (n=237)	Sub-Urban (n=297)	Urban (n=156)	18-34 (n=84)	35-54 (n=210)	55+ (n=396)	Standalone LL (n=210)
My mobile phone	44%	37%	62%	89%	60%	34%	33%
My fixed landline	37%	42%	16%	7%	22%	38%	45%
Either my fixed landline and mobile phone	20%	21%	22%	4%	19%	28%	21%

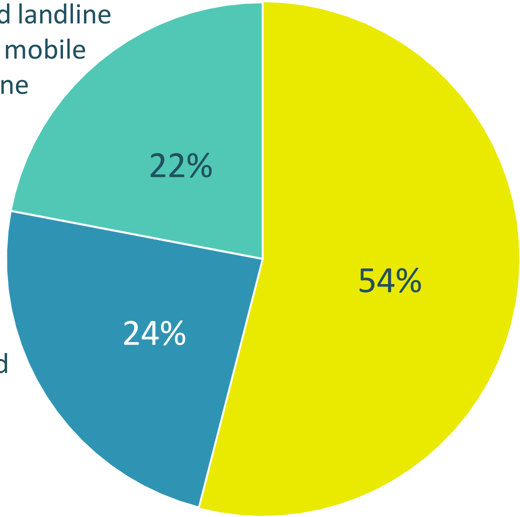
51% of respondents with a landline indicate that friends and family would typically ring their mobile when they are at home, increasing to 89% among under 35s. However among those aged 55+, it is slightly more likely that friends or family will ring their fixed landline.

(Q.34a)

How others call you at Home

(Base: All telecoms decision makers using fixed landline telephone; n=690)

Q. When other people, that are not friends or family members call you at home, what phone do they typically contact you on?



	Location			Age			
	Rural (n=237)	**Sub-Urban (n=297)**	**Urban (n=156)**	**18-34 (n=84)**	**35-54 (n=210)**	**55+ (n=396)**	**Standalone LL (n=210)**
My mobile phone	46%	45%	63%	87%	69%	36%	33%
My fixed landline	33%	31%	17%	7%	11%	37%	47%
Either my fixed landline and Mobile phone	21%	24%	20%	6%	20%	27%	20%

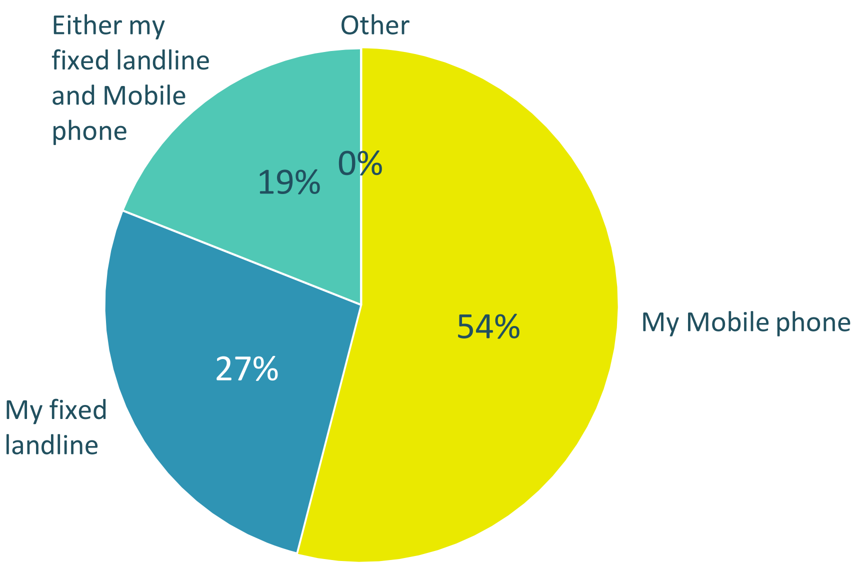
When analysing how people receive calls while at home, from those other than friends or family, the pattern is very similar, with 54% saying that they would typically receive calls on their mobile phone.

(Q.34b)

Primary Method to call Friends or Family from Home

(Base: All telecoms decision makers using fixed landline telephone; n=690)

Q. What phone do you primarily use when making phone calls from your home to friends or family members?



	Location			Age			
	Rural (n=237)	**Sub-Urban (n=297)**	**Urban (n=156)**	**18-34 (n=84)**	**35-54 (n=210)**	**55+ (n=396)**	**Standalone LL (n=210)**
My mobile phone	43%	44%	65%	92%	66%	36%	34%
My fixed landline	37%	39%	14%	4%	19%	38%	44%
Either my fixed landline or mobile phone	19%	17%	20%	4%	14%	26%	22%
Other	0%	0%	1%	0%	1%	0%	0%

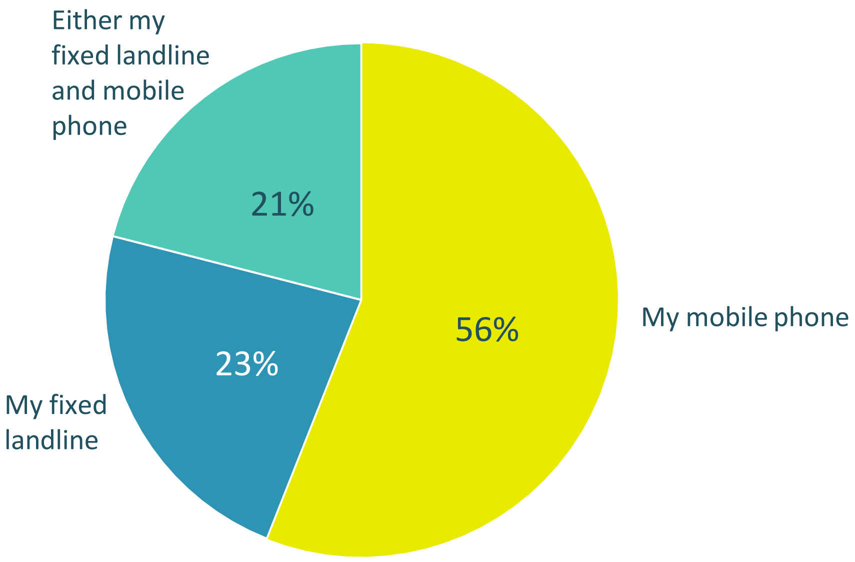
54% indicate they would primarily use their mobile phone to call friends or family from home. Only those aged 55+ and those with standalone landline are more likely to report using landline rather than mobile phone.

(Q.35a)

Primary Method used to Call other People

(Base: All telecoms decision makers using fixed landline telephone; n=690)

Q. What phone do you primarily use when making phone calls from your home to other people, i.e not friends or family members?



	Location			Age			
	Rural (n=237)	**Sub-Urban (n=297)**	**Urban (n=156)**	**18-34 (n=84)**	**35-54 (n=210)**	**55+ (n=396)**	**Standalone LL (n=210)**
My mobile phone	46%	48%	66%	91%	72%	37%	37%
My fixed landline	31%	30%	15%	2%	11%	36%	43%
Either my fixed landline and mobile phone	22%	22%	19%	8%	16%	27%	21%

56% of respondents said they would primarily use their mobile phone when calling other people (i.e. not friends or family) from home.

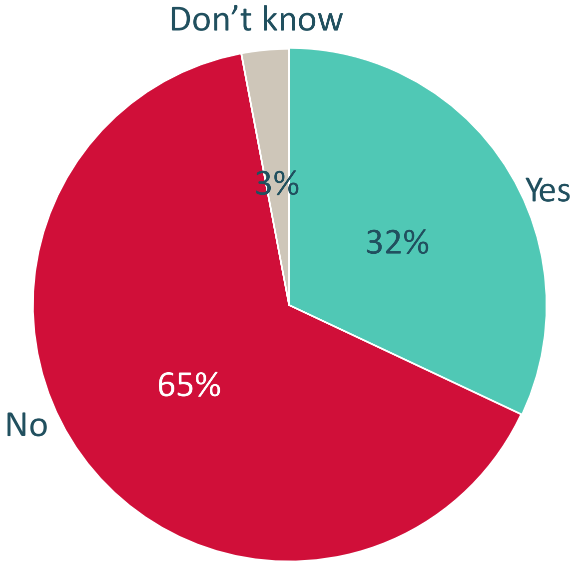
(Q.35b)

Switching and Sticking

Switching Landline Provider

(Base: All telecoms decision makers using fixed landline telephone; n=690)

Q. Have you ever switched your fixed landline service supplier?



	Location			Age			
	Rural (n=237)	Sub-Urban (n=297)	Urban (n=156)	18-34 (n=84)	35-54 (n=210)	55+ (n=396)	Standalone LL (n=210)
Yes	28%	29%	36%	14%	42%	33%	18%
No	71%	68%	60%	77%	57%	65%	77%
Don’t know	*	3%	4%	9%	1%	2%	5%

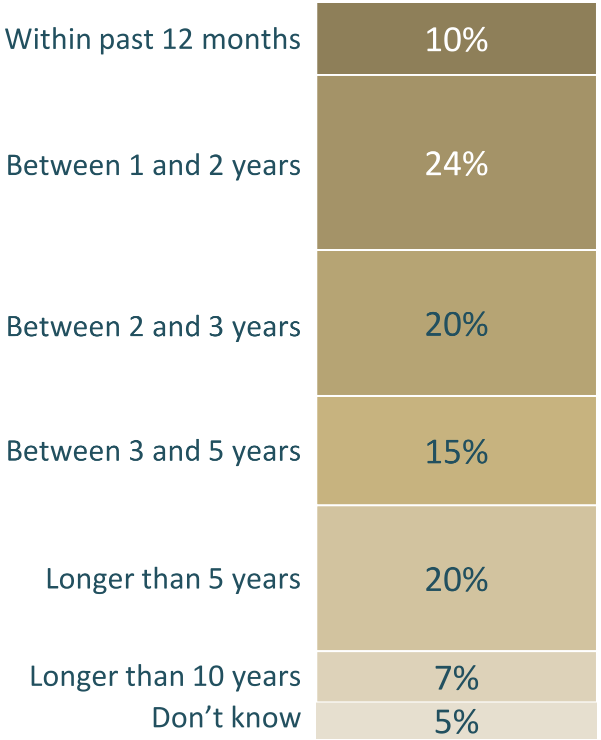
Only 32% of fixed landline users have ever switched landline providers – more likely to be those aged between 35-54.

(Q.36)

How long since Switching?

(Base: All who switched their fixed landline supplier; n=214)

Q. Approximately how long ago did you last switch your fixed landline service supplier?



NET: PAST 2 YEARS **34%**

NET: LONGER THAN 2 YEARS **62%**

	Location			Age		
	Rural (n=68)	Sub-Urban (n=91)	Urban (n=55)	18-34 (n=12*)	35-54 (n=84)	55+ (n=118)
Within past 12 months	18%	17%	3%	10%	16%	7%
Between 1 and 2 years	23%	15%	29%	46%	27%	19%
Between 2 and 3 years	16%	23%	21%	37%	25%	15%
Between 3 and 5 years	22%	24%	8%	0	12%	19%
Longer than 5 years	17%	19%	21%	3%	12%	28%
Longer than 10 years	2%	1%	11%	3%	0	12%
Don't know	1%	1%	7%	2%	11%	1%
NET: PAST 2 YEARS	**41%**	**33%**	**32%**	**56%**	**42%**	**25%**
NET: LONGER THAN 2 YEARS	**57%**	**66%**	**61%**	**42%**	**48%**	**74%**

***CAUTION: SMALL BASE SIZE**

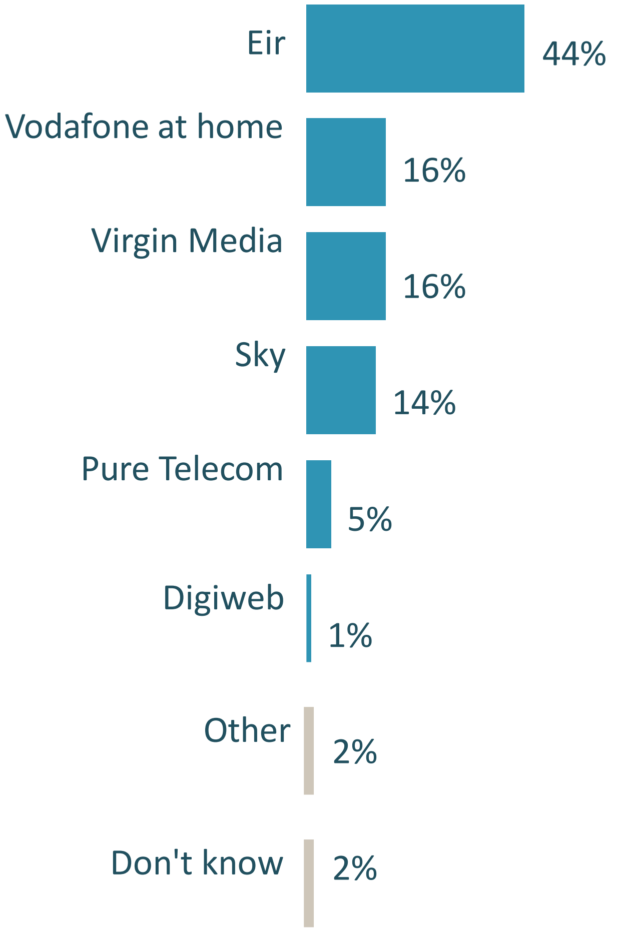
Of the 32% who have ever switched landline, 34% have done so in the past 2 years. Those aged under 55 are more likely to have been recent switchers, while the older age group (55+) are more likely than average to have switched over 5 years ago.

(Q.37)

Previous Landline Telephone Provider

(Base: All who switched their fixed landline supplier in last 2 years; n=77)

Q. Which fixed landline telephone service supplier were you previously with?



Of those who have switched in the past 2 years, 44% switched away from eir as their previous provider.

(Q.38)

Important reasons for switching

(Base: All who switched their landline in past 2 years; n=214)

Q. Thinking back to when you decided to switch your fixed landline service provider, what were the most important reasons in your decision to switch?

	Total	Location		
		Rural (n=68)	Sub-Urban (n=91)	Urban (n=55)
Better value in the price of bundle of services offered	32%	30%	28%	34%
Better value in the calls package offered	31%	30%	29%	32%
Overall cost of fixed voice (i.e. line rental + calls)	17%	24%	18%	15%
Cost of making calls (outside of any inclusive minutes)	17%	22%	18%	15%
Number of inclusive minutes in calls package	14%	17%	21%	9%
The level of customer service offered by the operator	12%	8%	17%	12%
Faster broadband with current fixed landline supplier	12%	12%	14%	11%
The reliability of the phone service (e.g. fewer dropped calls)	7%	1%	16%	5%
Wanted to switch to a bundle including more services	6%	6%	17%	2%
Cost of incoming calls [i.e. costs others face when others call you]	5%	5%	7%	4%
Easier to have a single supplier for both or all services	5%	7%	8%	3%
Trusted brand of fixed landline service supplier	4%	3%	10%	1%
Wanted to switch to a bundle with fewer services	3%	3%	6%	1%
The quality of the line during a call (e.g. how clear the other person's voice is)	2%	4%	4%	0%
Cost of line rental	2%	2%	2%	2%
Other	7%	6%	2%	10%

*CAUTION: SMALL BASE SIZE

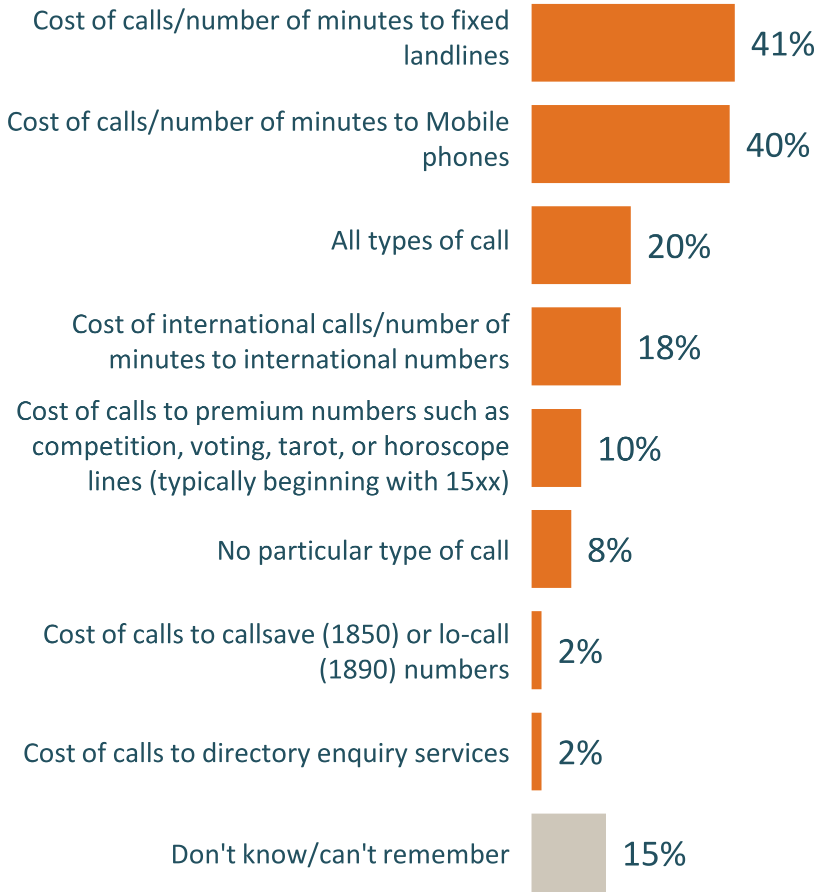
Reasons for switching tend to be based around receiving better value for money when purchasing services as part of a bundle or call package.

(Q.39)

Which call costs are most important?

(Base: All who switched as a result of cost of calls; n=91)

Q. You mentioned that the cost of calls was an important reason for switching supplier. Which of the following types of calls were of particular importance to you?



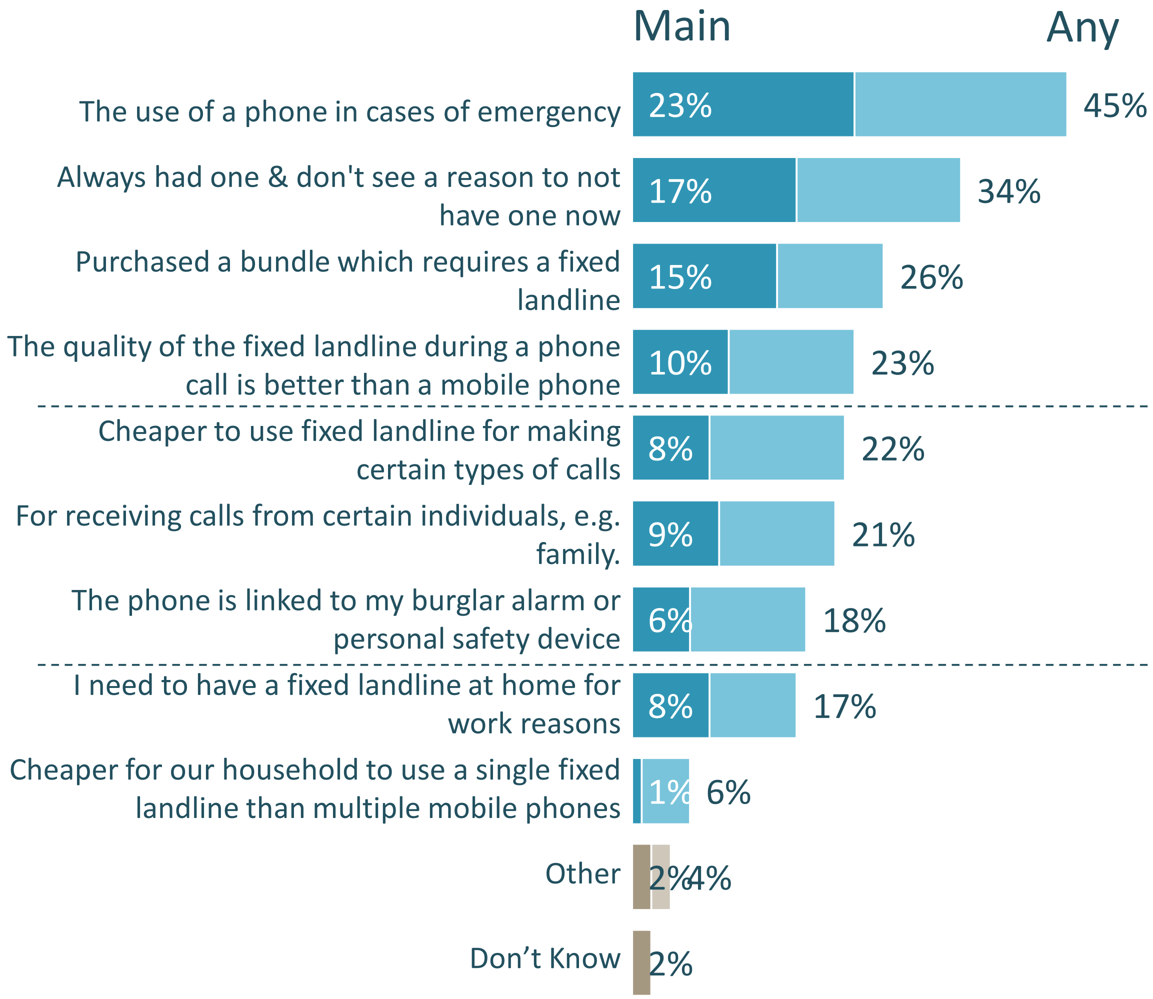
If the reason for switching was related to cost of calls, then the cost of calls/number of minutes to fixed landlines and mobile phone was of approximately equal importance, at 41% and 40% respectively.

(Q.40)

Reason for having a Fixed Landline

Q. What is the main reason for having a fixed landline in your home? Any others?

(Base: All telecoms decision makers using fixed landline telephone; n=690)



Location			Age			
Rural (n=237)	Sub-Urban (n=297)	Urban (n=156)	18-34 (n=84)	35-54 (n=210)	55+ (n=396)	Standalone LL (n=210)
63%	55%	31%	41%	39%	49%	53%
42%	36%	29%	23%	26%	41%	40%
24%	29%	26%	20%	41%	21%	7%
38%	34%	9%	19%	24%	24%	31%
23%	27%	18%	31%	16%	22%	30%
22%	21%	21%	5%	20%	27%	26%
29%	32%	4%	11%	18%	20%	24%
15%	21%	16%	27%	24%	11%	9%
6%	10%	3%	5%	4%	8%	7%
1%	1%	7%	6%	1%	5%	2%

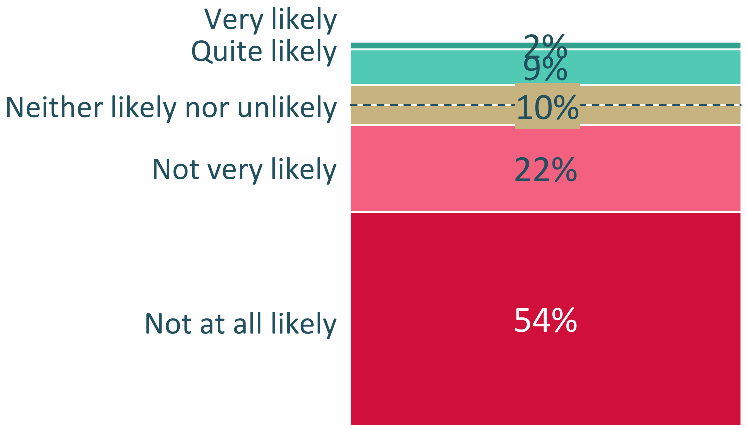
The primary reason for having a fixed landline is to be able to use it in cases of emergency, followed by keeping with the status quo of always having had a landline.

(Q.41)

Likelihood of switching Landline Provider in next 12 months

(Base: All telecoms decision makers using fixed landline telephone; n=690)

Q. How likely or unlikely are you to consider switching your fixed landline service supplier within the next 12 months?



Don't Know	4%
NET: LIKELY	**11%**
NET: UNLIKELY	**75%**

	Location			Age			
	Rural (n=237)	Sub-Urban (n=297)	Urban (n=156)	18-34 (n=84)	35-54 (n=210)	55+ (n=396)	Standalone LL (n=210)
Very likely	2%	3%	2%	0%	4%	2%	3%
Quite likely	4%	2%	15%	22%	9%	4%	3%
Neither likely nor unlikely	4%	8%	14%	18%	12%	7%	8%
Not very likely	32%	29%	13%	18%	25%	21%	20%
Not at all likely	56%	56%	51%	33%	48%	63%	63%
Don't Know	2%	3%	4%	9%	2%	2%	4%
NET: LIKELY	**6%**	**4%**	**18%**	**22%**	**13%**	**7%**	**6%**
NET: UNLIKELY	**88%**	**84%**	**64%**	**51%**	**73%**	**84%**	**83%**

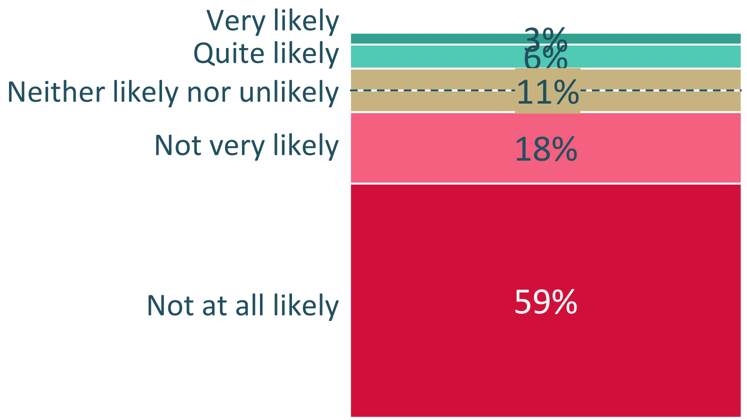
11% of landline users report likelihood of switching provider in next 12 months – higher among those in urban areas and those aged under 35.

(Q.42)

Likelihood of surrendering Landline in next 12 months

(Base: All telecoms decision makers using fixed landline telephone; n=690)

Q. How likely or unlikely are you to give up your fixed landline in the next 12 months?



Don't Know	3%
NET: LIKELY	**9%**
NET: UNLIKELY	**77%**

	Location			Age			
	Rural (n=237)	Sub-Urban (n=297)	Urban (n=156)	18-34 (n=84)	35-54 (n=210)	55+ (n=396)	Standalone LL (n=210)
Very likely	0%	1%	6%	9%	2%	2%	5%
Quite likely	2%	1%	10%	19%	3%	3%	2%
Neither likely nor unlikely	2%	7%	17%	19%	13%	7%	4%
Not very likely	25%	23%	12%	9%	22%	18%	18%
Not at all likely	68%	65%	51%	35%	56%	68%	66%
Don't Know	3%	2%	4%	9%	3%	2%	5%
NET: LIKELY	**2%**	**2%**	**16%**	**28%**	**5%**	**5%**	**7%**
NET: UNLIKELY	**93%**	**89%**	**63%**	**44%**	**78%**	**86%**	**84%**

9% cite they are likely to give up their landline in the next 12 months – significantly more likely among those in urban areas (16%) and those aged under 35 (28%).

(Q.43)

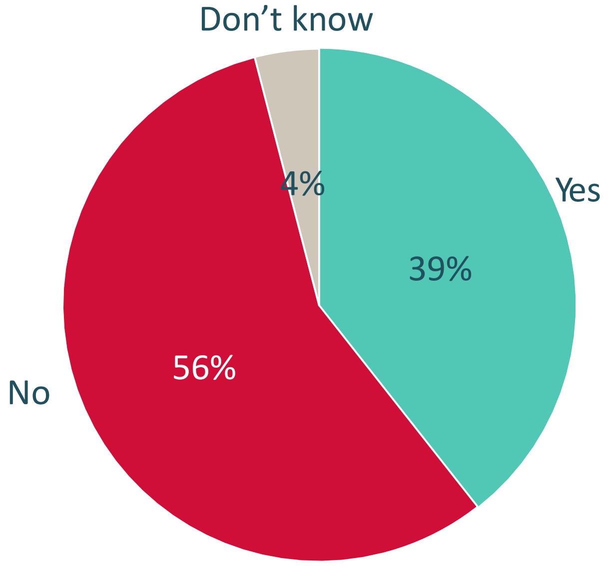
REDC

Non Landline Owners

Incidence of ever having had Landline in Home

(Base: All telecoms decision makers without fixed landline telephone; n=1002)

Q. Did you previously have a fixed landline in your current home?



	Location			Age		
	Rural (n=375)	**Sub-Urban (n=383)**	**Urban (n=244)**	**18-34 (n=322)**	**35-54 (n=480)**	**55+ (n=200)**
Yes	40%	36%	41%	25%	39%	60%
No		58%	55%	67%	58%	39%
Don't know	3%	6%	3%	8%	3%	2%

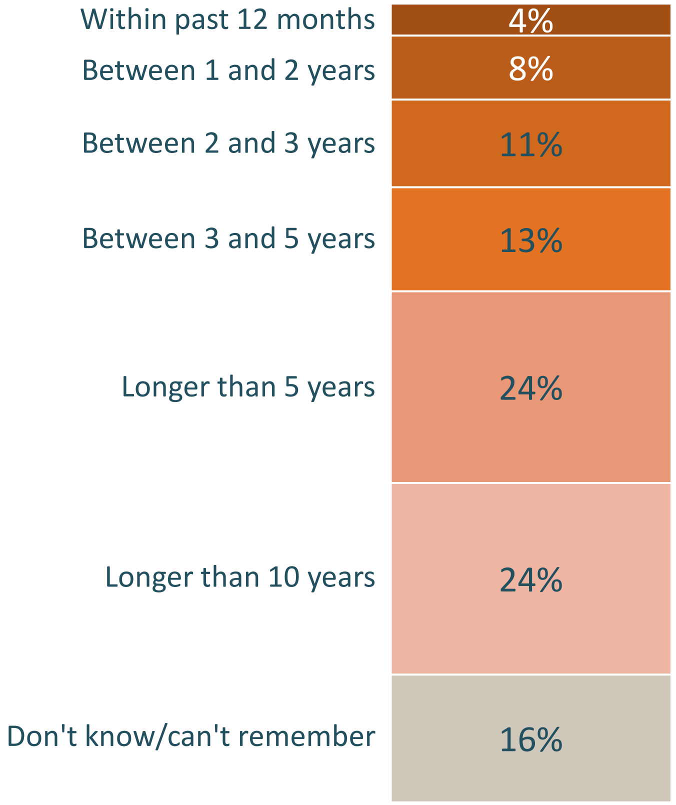
Of those currently without a fixed landline, 39% report having had one at some point – more likely among those aged 55+.

(Q.44)

Length of time since surrendering Landline

Q. Approximately how long ago did you stop having a fixed landline in your home?

(Base: All telecoms decision makers without fixed landline telephone who previously had it; n=373)



NET: PAST 2 YEARS **12%**

NET: LONGER THAN 2 YEARS **72%**

	Location			Age		
	Rural (n=143)	**Sub-Urban (n=139)**	**Urban (n=91)**	**18-34 (n=72)**	**35-54 (n=179)**	**55+ (n=122)**
Within past 12 months	4%	3%	5%	9%	3%	3%
Between 1 and 2 years	8%	14%	5%	10%	8%	6%
Between 2 and 3 years	11%	9%	12%	11%	12%	10%
Between 3 and 5 years	23%	22%	4%	20%	12%	10%
Longer than 5 years	26%	29%	20%	15%	20%	33%
Longer than 10 years	23%	16%	29%	5%	28%	29%
Don't know/can't remember	6%	6%	25%	30%	16%	8%
NET: PAST 2 YEARS	**11%**	**18%**	**10%**	**19%**	**11%**	**10%**
NET: LONGER THAN 2 YEARS	**83%**	**76%**	**65%**	**51%**	**73%**	**81%**

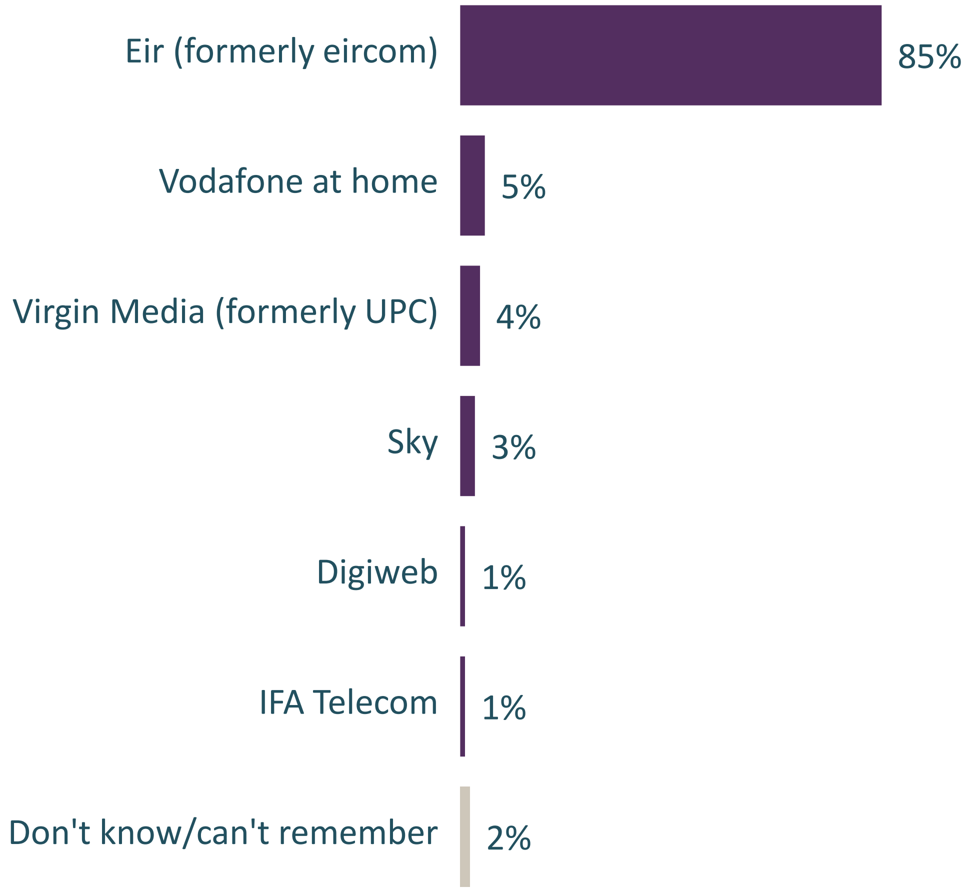
72% of those who at one point had a landline, surrendered it more than 2 years ago. Those who have more recently surrendered their landline are most likely to be from sub-urban areas, or aged 18-34.

(Q.45)

Previous Landline Provider

(Base: All telecoms decision makers without fixed landline telephone who previously had it; n=373)

Q. What service provider provided your fixed landline service?



	Location			Age		
	Rural (n=143)	Sub-Urban (n=139)	Urban (n=91)	18-34 (n=72)	35-54 (n=179)	55+ (n=122)
Eir (formerly eircom)	85%	92%	81%	78%	82%	92%
Vodafone at home	11%	5%	3%	1%	6%	6%
Virgin Media (formerly UPC)	1%	*	7%	5%	5%	1%
Sky	1%	1%	4%	11%	2%	*
Digiweb	0	0	1%	0	2%	0
IFA Telecom	0	0	1%	0	1%	0
Don't know/can't remember	3%	2%	2%	5%	2%	*

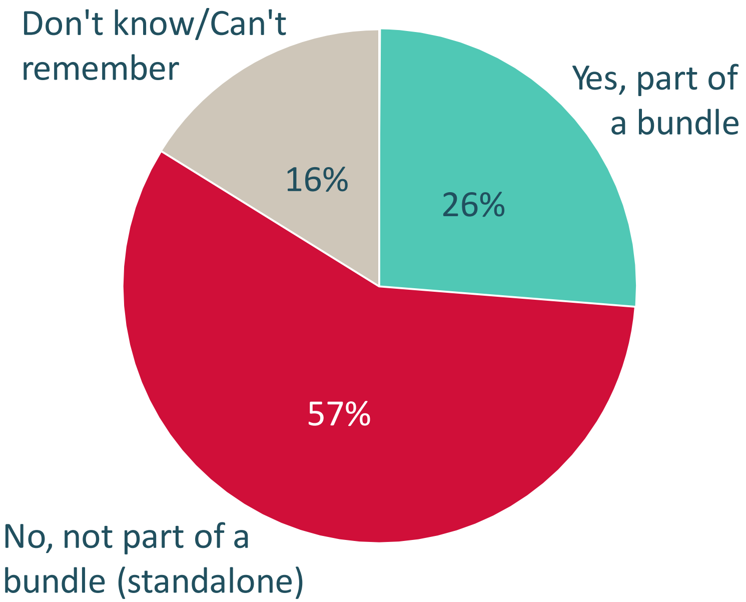
Among those who previously had a landline, in 85% of instances, their provider was eir.

(Q.46)

Was previous Fixed Landline part of a Bundle?

(Base: All telecoms decision makers without fixed landline telephone who previously had it; n=373)

Q. Was this fixed landline service provided as part of a bundle with other services, i.e. you would receive a single bill from one operator for multiple services?



	Location			Age		
	Rural (n=143)	Sub-Urban (n=139)	Urban (n=91)	18-34 (n=72)	35-54 (n=179)	55+ (n=122)
Yes, part of a bundle	27%	17%	31%	40%	29%	14%
No, not part of a bundle (standalone)	66%	75%	46%	41%	54%	72%
Don't know/Can't remember	7%	8%	24%	19%	17%	13%

26% of those who dropped landline had it as part of a bundle – more likely among those in urban areas and those aged under 35.

(Q.47)

Reasons for not having a Fixed Landline

(Base: All telecoms decision makers without fixed landline telephone; n =1002)

Q. What are the main reasons for not having a fixed landline telephone in your home?

		Location			Age		
		Rural (n=375)	Sub-Urban (n=383)	Urban (n=244)	18-34 (n=322)	35-54 (n=480)	55+ (n=200)
I use my Mobile phone for calls & don't need a fixed landline	36%	43%	40%	31%	33%	34%	42%
We wouldn't use the phone enough	30%	30%	32%	29%	28%	33%	26%
The cost of calls is too high	21%	26%	30%	14%	15%	23%	24%
Line rental charge is too high	19%	27%	35%	8%	18%	20%	22%
No phone installed when I moved into my home	19%	23%	12%	20%	25%	19%	9%
I use Skype, WhatsApp calls, Viber, Snapchat calls, Facetime instead from a computer, laptop, tablet, or Mobile smart phone	14%	16%	22%	9%	19%	13%	9%
The cost of the fixed voice package (calls + line rental) is too high	12%	12%	24%	5%	10%	12%	13%
The installation charge is too high	9%	10%	18%	4%	8%	9%	11%
My landlord did not install a line	3%	3%	4%	3%	7%	1%	3%
Too expensive/extra cost/extra bill	2%	1%	1%	4%	1%	3%	4%
Cannot have a prepay service with a fixed landline	2%	2%	1%	2%	4%	1%	1%
I can't get a fixed landline installed in my home	2%	0	1%	3%	3%	2%	0
I move home a lot	2%	2%	2%	1%	4%	1%	1%
I am no longer taking a bundle of services	1%	2%	*	1%	2%	1%	*
The people I live with were not paying their fair share of the bill	1%	1%	2%	0	1%	1%	0
Other	3%	1%	1%	5%	*	3%	6%

Use of mobile phone main reason for not having a fixed line.

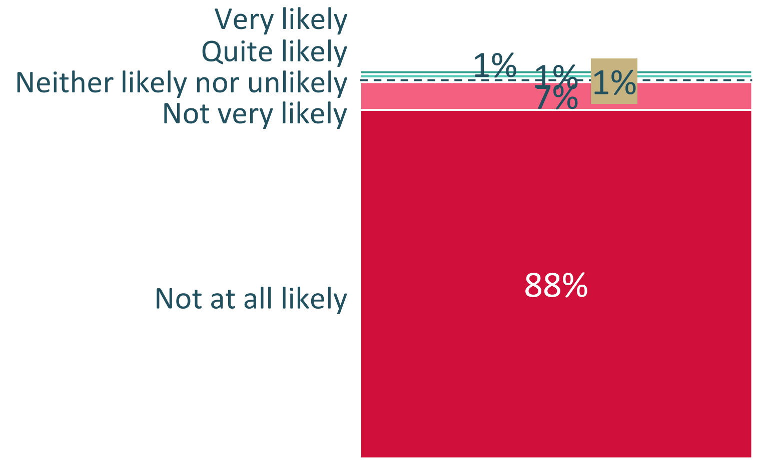
(Q.48)

REDC

Likelihood of getting a Fixed Landline in next 12 months

(Base: All telecoms decision makers without fixed landline telephone; n =1002)

Q. How likely or unlikely are you to consider getting a fixed landline phone service in your home within the next 12 months?



	Total
Don't Know	2%
NET: LIKELY	**2%**
NET: UNLIKELY	**95%**

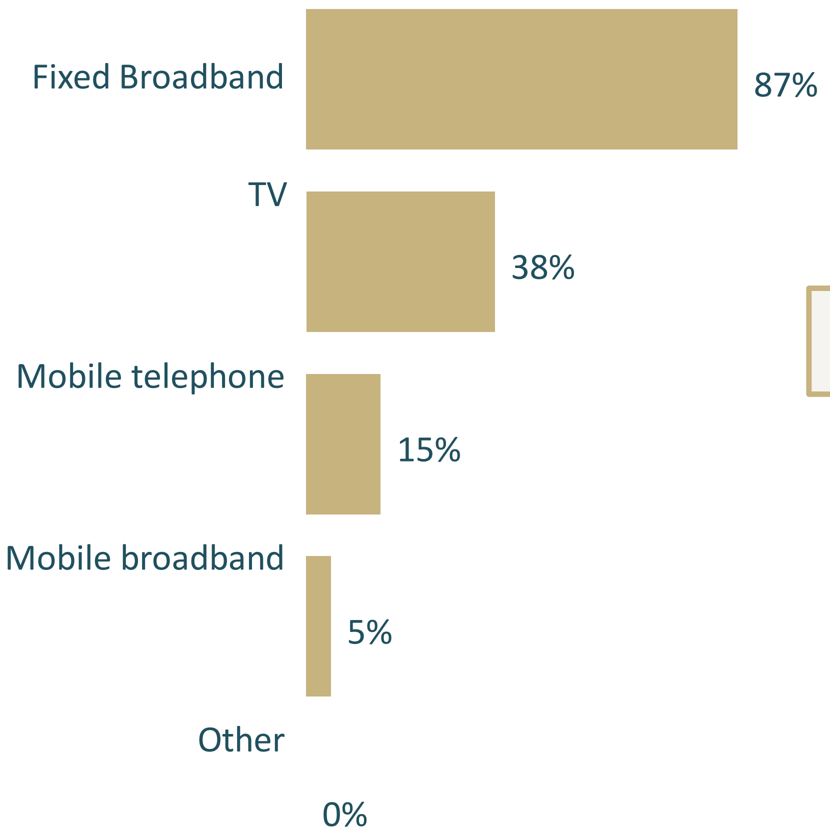
	Location			Age		
	Rural (n=375)	Sub-Urban (n=383)	Urban (n=244)	18-34 (n=322)	35-54 (n=480)	55+ (n=200)
Very likely	*	0%	2%	1%	1%	0%
Quite likely	*	1%	1%	2%	1%	*
Neither likely nor unlikely	1%	1%	2%	2%	2%	*
Not very likely	8%	8%	6%	12%	6%	3%
Not at all likely	87%	89%	87%	79%	89%	96%
Don't Know	2%	1%	2%	4%	1%	*
NET: LIKELY	**1%**	**1%**	**3%**	**3%**	**2%**	***%**
NET: UNLIKELY	**96%**	**97%**	**93%**	**91%**	**95%**	**99%**

Among those without a landline currently, only 2% suggest that they are likely to consider getting one in the next 12 months.

(Q.49)

Other Services included in previous Bundle with Fixed Landline

(Base: All telecom decision makers who previously had a landline in a bundle; n=91)



Q. What other services were bundled with your fixed landline service?

For those who previously had a landline as part of a bundle, 87% also had fixed broadband in this bundle, with TV being the next most prevalent (featuring in 38% of bundles).

(Q.47b)

SSNIP

SSNIP Questions

/ Small but Significant Non-Transitory Increase in Price ('SSNIP')

/ SSNIP questions were included as part of the survey in order to evaluate the impact of potential changes in costs of the user's phone service on their behaviour in terms of their services selection.

/ However, given the small base sizes qualifying for some scenarios, not all results have not been presented.

/ Four SSNIP scenarios defined as follows:

» SSNIP1 – €2 per month increase in the cost of line rental. Asked of those with fixed landline service, who purchase their calls and line rental from separate providers (n=3)

» SSNIP2 – €2 per month increase in the cost of fixed landline calls. Asked of those with fixed landline service, who purchase their calls and line rental from separate providers (n=3)

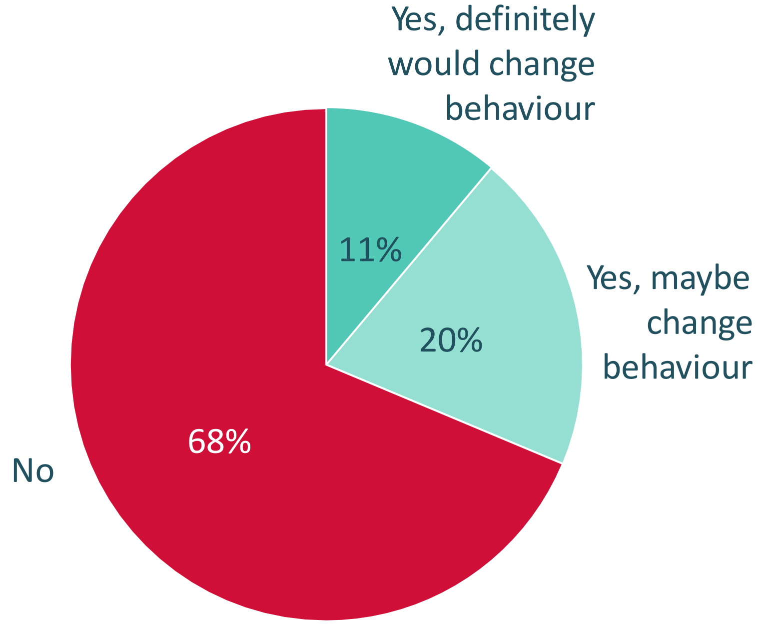
» SSNIP3 - €4 per month increase in the total cost of the bill (i.e. cost of line rental and calls). Asked of those with fixed landline service, who purchase their calls and line rental from the same provider, and do not purchase their fixed landline services as part of a bundle (n=171).

» SSNIP4 - €2 per month increase in the cost of the fixed phone component of the bundle. Asked of those with fixed landline service, who purchase their calls and line rental from the same provider, and purchase their fixed landline services as part of a bundle of telecommunications services (n=282).

SSNIP3: What would you do if Cost of Landline increased by €4?

(Base: All telecoms decision makers who don't bundle their landline and pay for line rental and calls together; n = 171)

Q. You mentioned earlier that you purchase a package comprising fixed landline as well as calls from your fixed landline supplier. Imagine if your fixed landline supplier increased the total cost of your bill by €4 per month.



	Location			Age		
	Rural (n=67)	**Sub-Urban (n=79)**	**Urban (n=25*)**	**18-34 (n=13*)**	**35-54 (n=33*)**	**55+ (n=125)**
Yes, definitely would change behaviour	5%	5%	25%	20%	8%	11%
Yes, maybe change behaviour	17%	19%	25%	12%	18%	23%
No	79%	76%	50%	68%	74%	67%

***CAUTION: SMALL BASE SIZE**

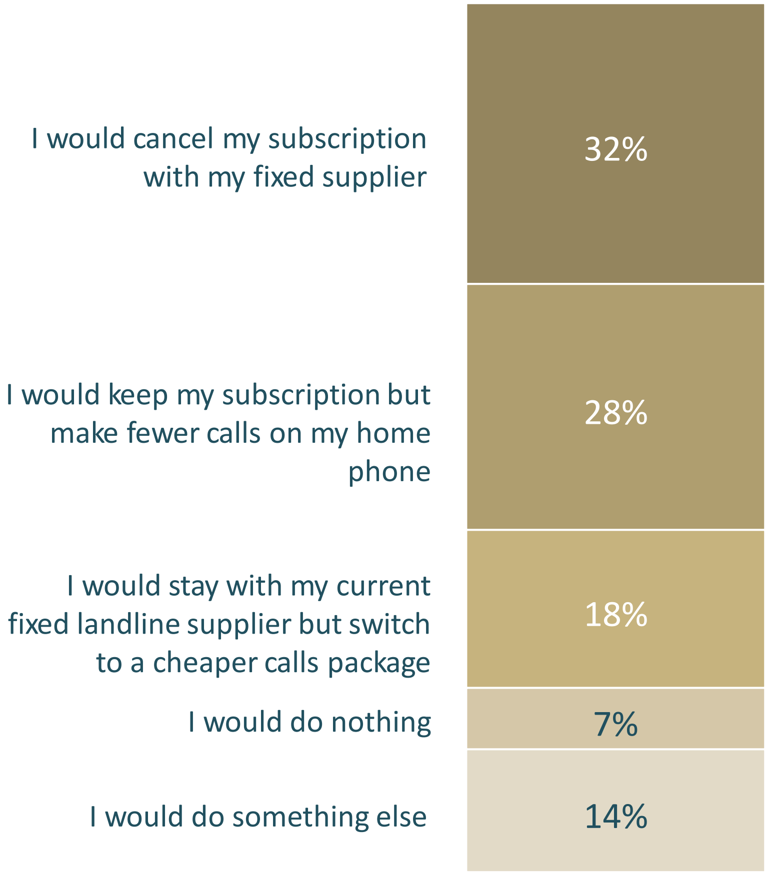
11% are confident that they would change behaviour in light of a €4 increase, with a further 20% suggesting that they may change behaviour.

REDC

(Q.SSNIP 11)

How would behaviour change if Fixed Landline Provider increased the total cost of bill by €4 per month?

(Base: All telecoms decision makers who don't bundle their landline and pay for line rental and calls together and would change behaviour; n= 47)



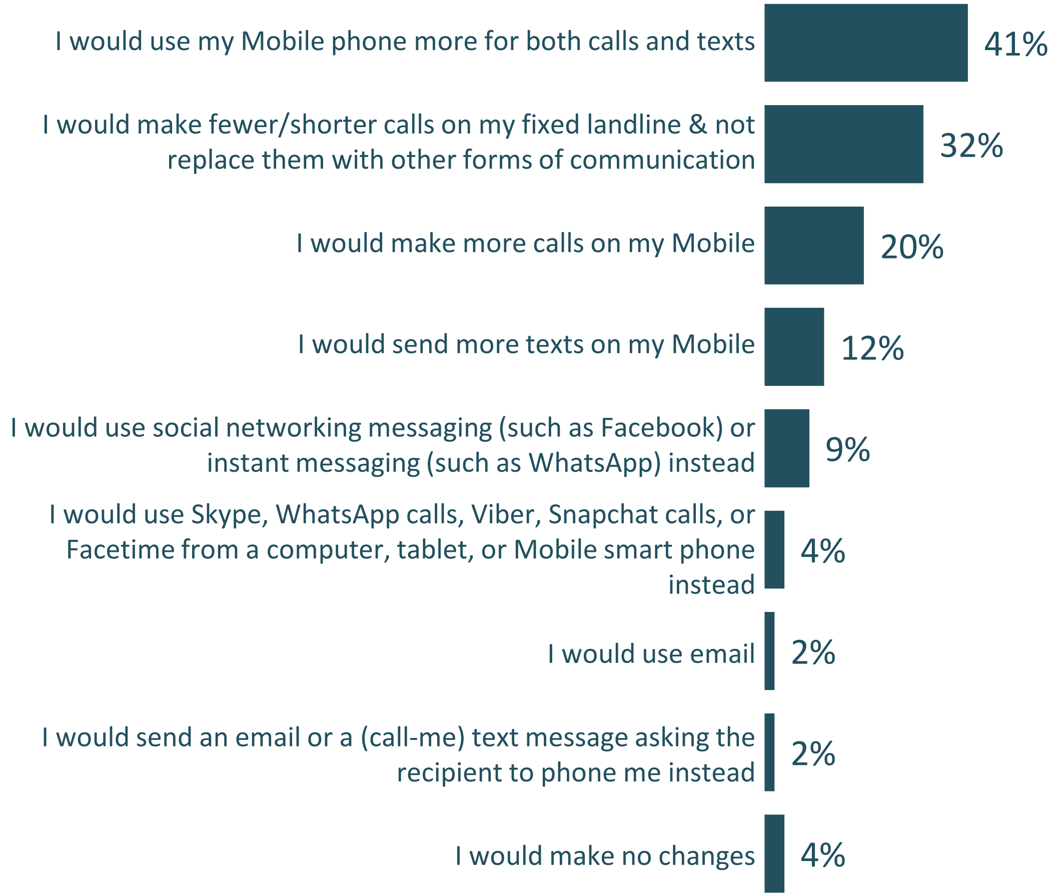
Q. Which of the following would describe what you would be most likely to do?

Of those indicating they would change behaviour, 32% suggest they would cancel their subscription, and a further 28% indicate they would make fewer calls on their home phone.

(Q.SSNIP 12)

What would you do if remaining with current supplier?

(Base: All telecoms decision makers who don't bundle their landline and pay for line rental and calls together and would keep subscription; n= 24)



Q. Which of the following would you do instead when you need to communicate with other people while at home?

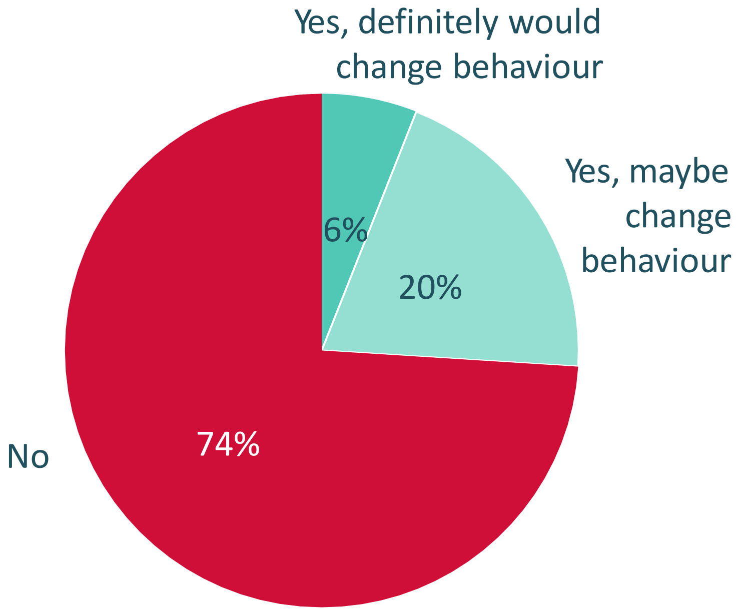
Primarily, those who would keep their landline subscription, said that they would use their mobile phone more (41%), followed by 32% suggesting they would just take fewer and shorter calls without replacing them in any other way.

(Q.SSNIP 14)

SSNIP4: How would behaviour change if Provider increased the cost of the fixed landline component of bundle by €2 per month?

(Base: All telecoms decision makers who bundle their landline and pay for line rental and calls together; n= 282)

Q. You mentioned earlier that you purchase fixed landline as well as other services as a bundle from your fixed landline supplier. Imagine if your fixed landline supplier increased the cost of the fixed landline component of your bundle by €2 per month. Do you think that you would change your behaviour?



	Location			Age		
	Rural (n=95)	Sub-Urban (n=126)	Urban (n=61)	18-34 (n=38*)	35-54 (n=110)	55+ (n=134)
Yes, definitely would change behaviour	11%	3%	6%	6%	6%	6%
Yes, maybe change behaviour	10%	15%	28%	15%	17%	26%
No	78%	82%	66%	79%	77%	68%

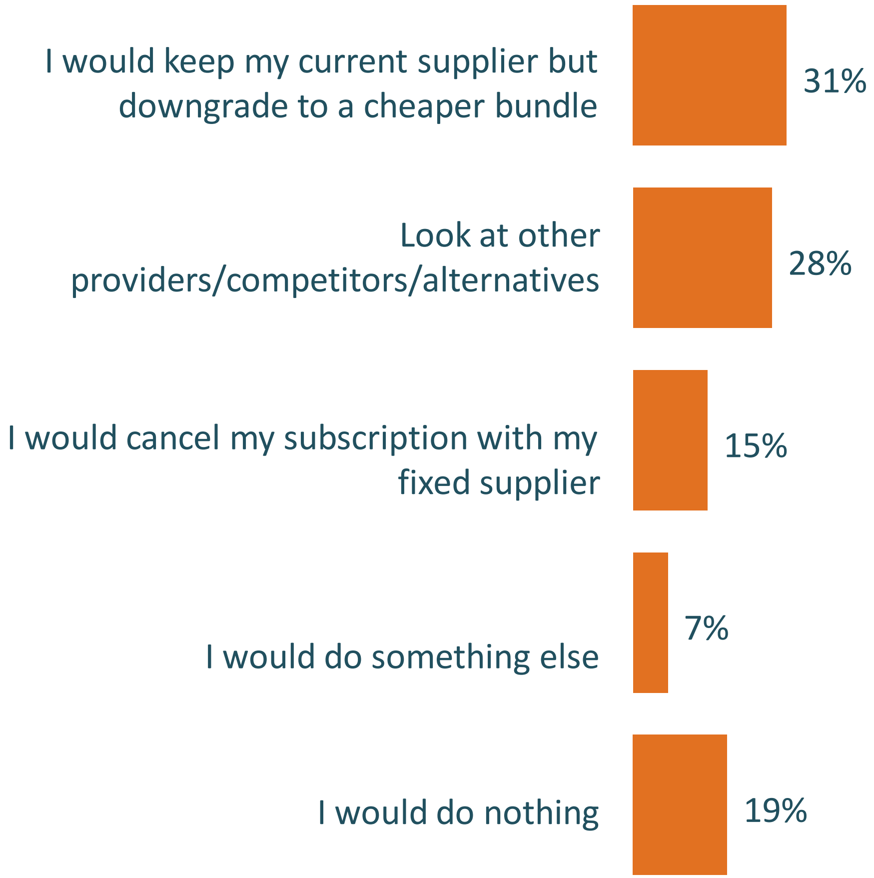
***CAUTION: SMALL BASE SIZE**

26% of those who have their landline as part of a bundle, and pay for line rental and calls together, indicate they would definitely (6%) or maybe (20%) change behaviour.

(Q.SSNIP 16)

How would behaviour change if Provider increased the cost of the fixed landline component of Bundle by €2 per month?

(Base: All telecoms decision makers who bundle their landline and pay for line rental and calls together and would change behaviour; n=65)



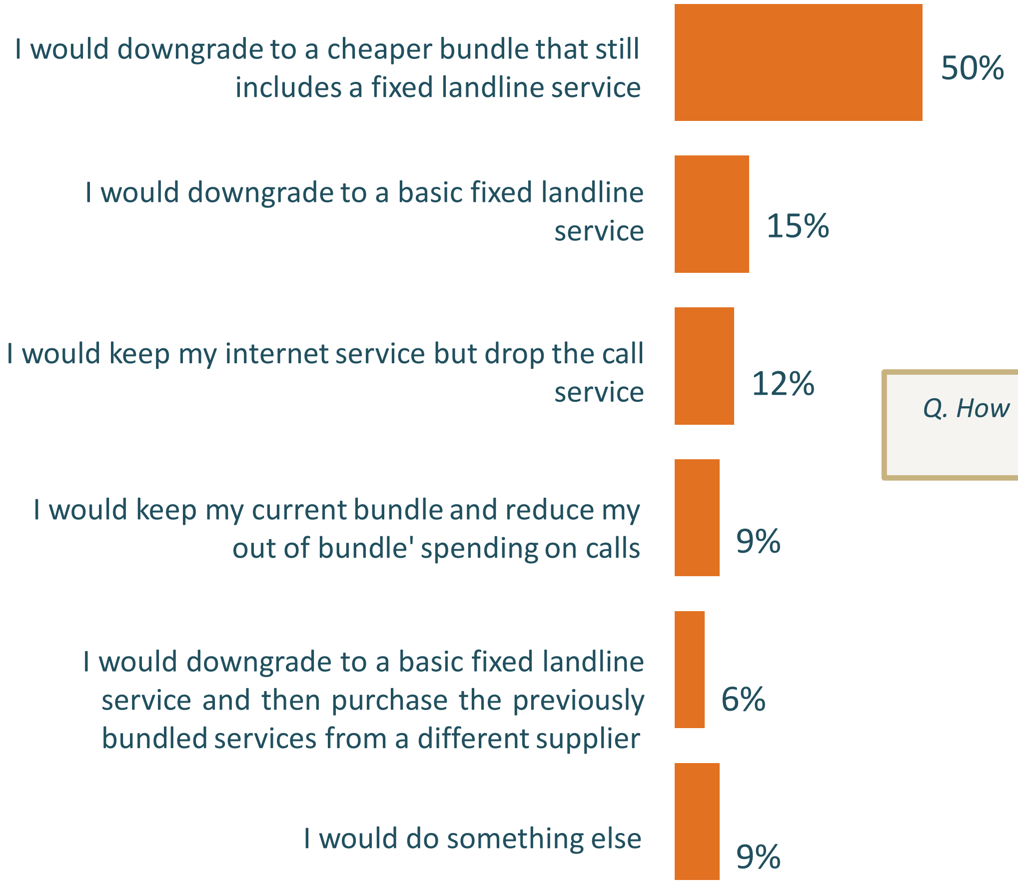
Q. Which of the following would describe what you would be most likely to do?

Of those indicating they would change behaviour in light of a price increase, 31% would stay with current provider but downgrade to a cheaper bundle, while a further 28% would start shopping around by looking for alternatives.

(Q.SSNIP 17)

How would you change how you purchase services from current Provider?

(Base: All telecoms decision makers who bundle their landline and pay for line rental and calls together; would keep subscription & downgrade; n= 26)



Q. How would you change how you purchase the services from your current supplier?

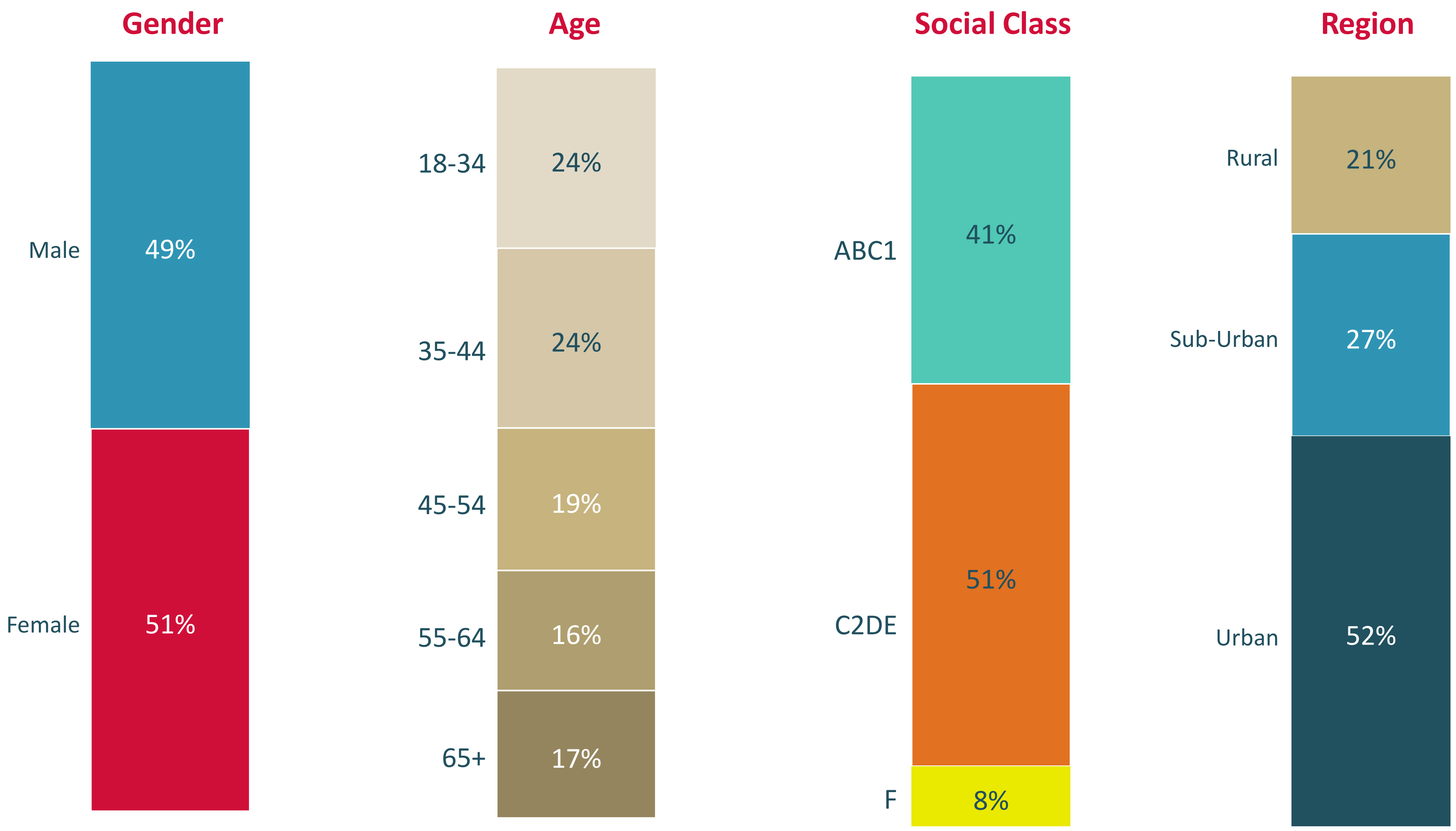
For those who would keep their subscriptions, but downgrade, 50% would move to cheaper bundle while still retaining a fixed landline service.

(Q.SSNIP 20)

Analysis of Sample

Analysis of Sample

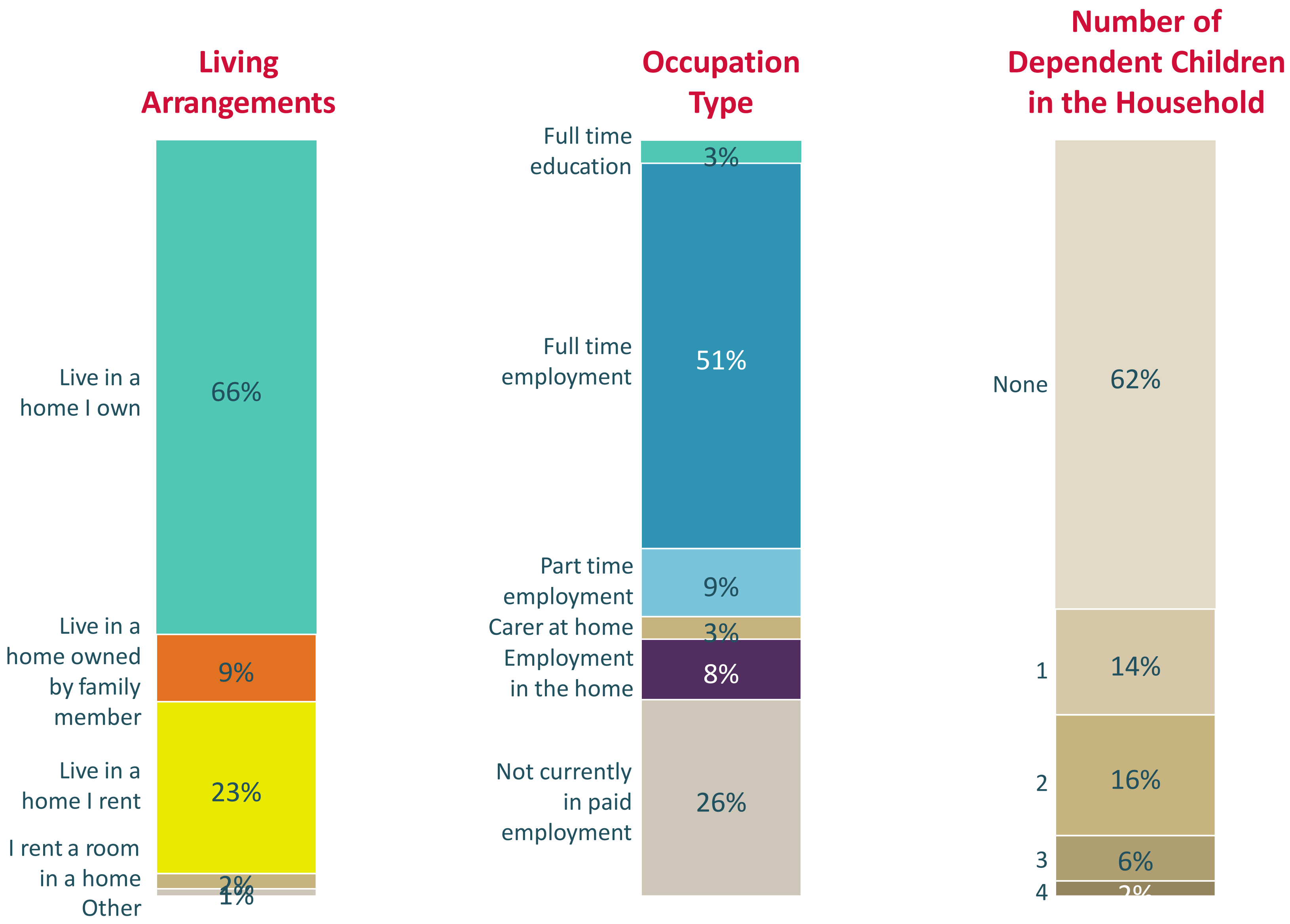
(Base: All telecoms decision makers; n=2011)



REDC

Analysis of Sample

(Base: All telecoms decision makers; n=2011)



Summary of Key Findings

Key Findings from this Survey – I

- 49% of the nationally representative sample of telecommunications decision makers aged 18+ in this survey have a fixed landline phone in the household, with 34% actively using it. Ownership of fixed landline is significantly higher among those aged 55+. Standalone landline penetration is 12% and very heavily skews towards those aged 65+.

- 68% of those paying for landline but not using it say that it is because they use their mobile phone instead. This is particularly the case among those aged under 35.

- 73% have access to fixed broadband in their home, with access via fibre network slightly more prevalent than access through traditional phone line. Among those without broadband, 40% indicate that this is because they have no need, while 27% suggest smartphone usage is deemed a suitable alternative.

- 50% of those with more than one product holds a bundle of some description. Most bundles contain fixed broadband (92%), TV (65%) or fixed landline (56%). Fixed broadband is selected as the most important product in a bundle among 64% of all bundle holders, significantly ahead of TV in second place at 17%.

Key Findings from this Survey – II

- Among those with a standalone landline, eir holds a significant lead in the market with 60% market share. Standalone fixed broadband is tightly contested, with both Vodafone at Home and eir holding 24% share each. Vodafone also leads the market in terms of standalone mobile. When we look at which company has greatest market share for bundles, it is eir with 32%, followed by Virgin Media which has a 26% share.

- On average, those with standalone landline are paying slightly more than €57 on their monthly bill, while the average cost for someone with landline in a bundle is more than €72. While only 17% rely on assistance to understand or pay a bill, it is clear that a sizable plurality (36-38%) do not know the cost of making calls from their fixed landline.

- Mobile phone usage is split evenly between Prepay and Postpay. Athe average Prepay spend is over €22, while those on Postpay are more likely to be spending €43.

- While 32% make calls from landline and mobile equally while at home, the majority (52%) indicate they would use their mobile phone more often, compared to 16% using their fixed landline more often. We record similar results when it comes to receiving calls as well.

Key Findings from this Survey – III

- 67% of fixed landline owners use Unmanaged VoIP at home, much higher among under 35s. 66% of these Unmanaged VoIP users use Unmanaged VoIP on a daily basis. The proportion using Unmanaged VoIP outside the home is slightly lower at 52% of all telecoms decision makers, but again a similar proportion (64%) do so on a daily basis.

- 30% of fixed landline users indicate they receive calls from other landlines on their fixed landline on a daily basis and the comparable figure for receiving calls from mobile phones on their fixed landline is 26%. Typically a mobile phone is used to make a call (54% family and friends, 56% other people) or receive calls (51% from family and friends, 54% from other people).

- 32% of fixed landline owners have previously switched their landline, with most (62%) having done so more than 2 years ago. Among more recent switchers, 41% have switched away from eir and cited better value in the bundle offer or better value in the cost of calls as being a driver for switching. 11% of landline users indicate likelihood of switching provider in the next 12 months but 9% indicate they will give up fixed landline altogether.

- Of those without a fixed landline, 39% did have one at one point, with 12% having surrendered it in the past two years. Among all who surrendered fixed landline, 81% were most recently with eir prior to giving up fixed landline.

Key Findings from this Survey – IV

- For those who don’t bundle their landline, and pay for line rental and cost of calls together, 31% indicate they would change behaviour in response to a price increase of €4 per month, with 32% likely to cancel their subscription and 28% to reduce usage (28%) of the fixed landline.

- Among those with fixed landline in a bundle, if the monthly price increased by €2, 26% believe they definitely or might change their behaviour. This would manifest in downgrading to a cheaper bundle for 31%, or encourage switching behaviour by looking at other Providers' offerings.

THANK YOU

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