An Coimisiún um
Rialáil Cumarsáide
Commission for
Communications Regulation

Broadband Connectivity Survey 2023

Survey of Consumers

Q1 – 2023

ComReg 23/76

B&A

Table of content

Commission for
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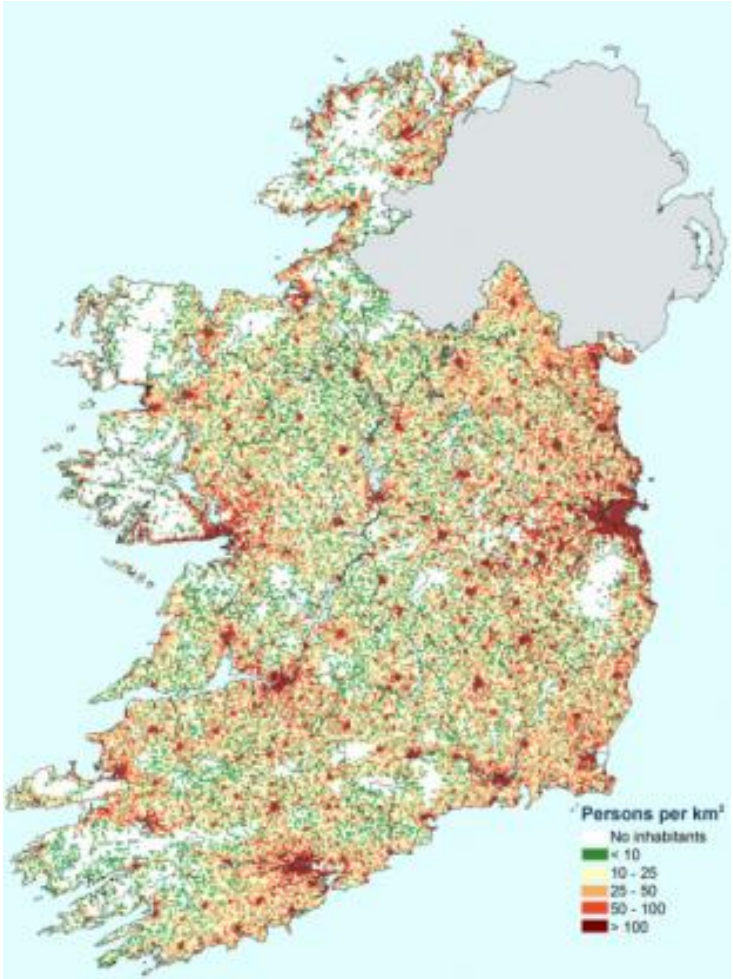
Introduction

Research methodology

- A **pilot** study of n=40 was conducted in Oct/Nov 2022 to test the questionnaire, and the consent form procedure. Adjustments to these elements were then introduced prior to the main fieldwork stage.
- The main fieldwork for this study was conducted between **November 2022 to March 2023**.
- Data collection methodology was '**face to face**' interviewing via CAPI (Computer Aided Personal Interviewing), with interviews administered at the respondents' home – 2,993 respondents were interviewed in total.
- The total sample was split across **five distinct segments**, based on **household density**, with a higher proportion of interviews conducted in areas of lower household density (the sample size by segment detail will follow). Thus, it is a **household-based sample.**
- The respondents interviewed were the **main/joint decision maker for home fixed telecommunications services** (e.g. Broadband, paid TV, landlines, etc.) in the household aged 18+.
- For the decision makers, interlocking quotas were applied across gender and age to ensure the findings are fully representative of such decision makers. B&A's face-to-face barometer data was used to create a quota profile of those aged 18+ who are decision-makers on their household TV / Broadband Suppliers. This was necessary as there is no profile of such a target on the census.
- **Consent forms were utilised** to enable ComReg to request consumers' data usage information from their mobile network provider. The consent form was discussed with respondents to ensure no impact on the data.
- A corrective weight was applied to the data within each segment to ensure the profile matched in each area it was set. Regionally the five density areas were weighted back into their correct proportion at a total sample level.
- Margin of error on a sample of 2,993 is +/-2%pts. For smaller sub-samples the margin will be greater.
- Significance testing at 95% confidence level was applied to the data and differences are highlighted throughout this presentation. In tables, green highlighting = significantly higher result than total result, while red highlighting = significantly lower result than total result.
- Commentary detailing 'higher' or 'lower' identifies findings that are significantly higher or lower versus the total sample.
- It became clear during analysis that there is some confusion among consumers regarding their broadband service. Given the challenge for respondents in terms of understanding fibre/ broadband terms/what broadband service they have, we decided on an approach to filtering the data to provide a clearer picture in regard to broadband services. This approach was utilized from Questions 35 to Q48, with two differing approaches utilized.
- Between Q35 and Q42, after we asked what broadband service they had, at the analysis stage we further filtered based on speed (250+ mpbs) and service provider. This was to ensure that we were basing out insights and analysis on only those with full fibre broadband.
- Between Q43 and Q48, after we asked what broadband service they had, at the analysis stage we further filtered based on speed (249 or less mpbs) and service provider. This was to ensure that we were basing out insights and analysis on only those with no full fibre broadband (e.g. copper wire, partial fibre, satellite, etc.).

Sample size and household density

	Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
Sample Size	594	594	606	598	601
Household Density	>200 per Sq. Km	<200 and >50 per Sq. Km	<50 and >15 per Sq. Km	<15 and >7 per Sq. Km	<7 per Sq. Km
Total Households (2016)	814,900	222,702	297,444	246,478	116,141
Sq. Km	1,146	2433	11,952	24,622	27,827
Number of Electoral Divisions (circa)	585	115	534	1127	1080
Example EDs	Cabra East B Dublin City	Mitchelstown Co. Cork	Durrow Co. Offaly	Anner Co. Tipperary	Glenfarne Co. Leitrim



Source: CSO, Census 2016

Urban — Rural

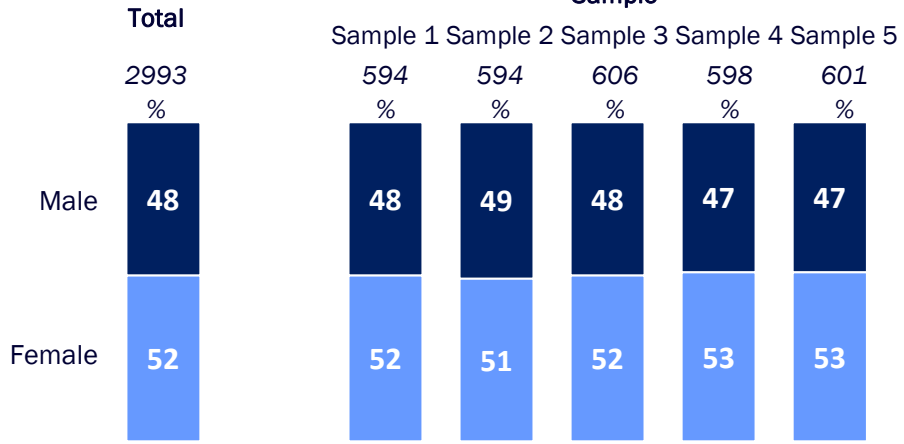
A note on reading the charts

Base Sizes	Base sizes on each chart refer to the unweighted base i.e. the raw number of interviews, as significance testing is based on the raw number of interviews. The charted data refers to the weighted percentages as this is the percentage representative of all decision makers 18+ who fall into that category.
Sample sizes	Some sample sizes have been identified as a small base size. These have been asterisked throughout the report. A small base size is defined as 50 responses or less, as base sizes less than this are not statistically robust.
Questions answered explained	Responses to all questions have been included however some have a very small base size and caution should be used when reviewing as these will not be significantly robust.
Percentages explained	In some cases percentages will not add up to 100%, this will be due to multi-coded responses where a respondent selected more than one response or due to rounding if +/- 1% of 100%.
Estimated values	With regard to questions which capture estimated values, the estimate is the average amount given by all respondents who answered that question.

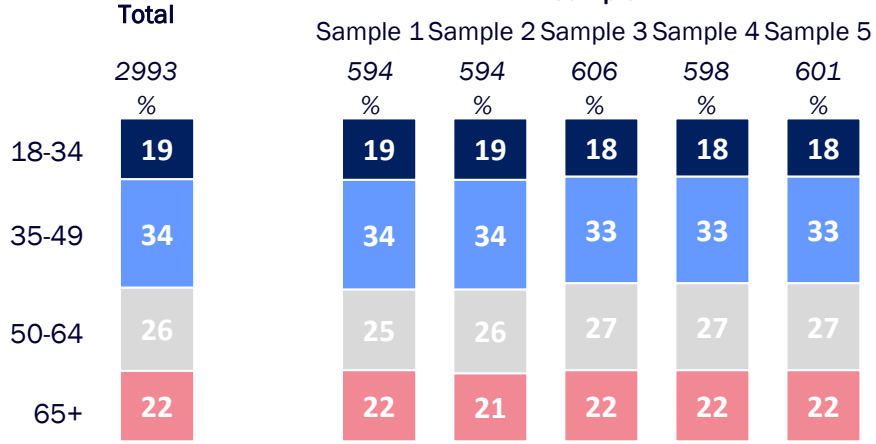
Profile of Respondents

Base: All respondents: 2,993

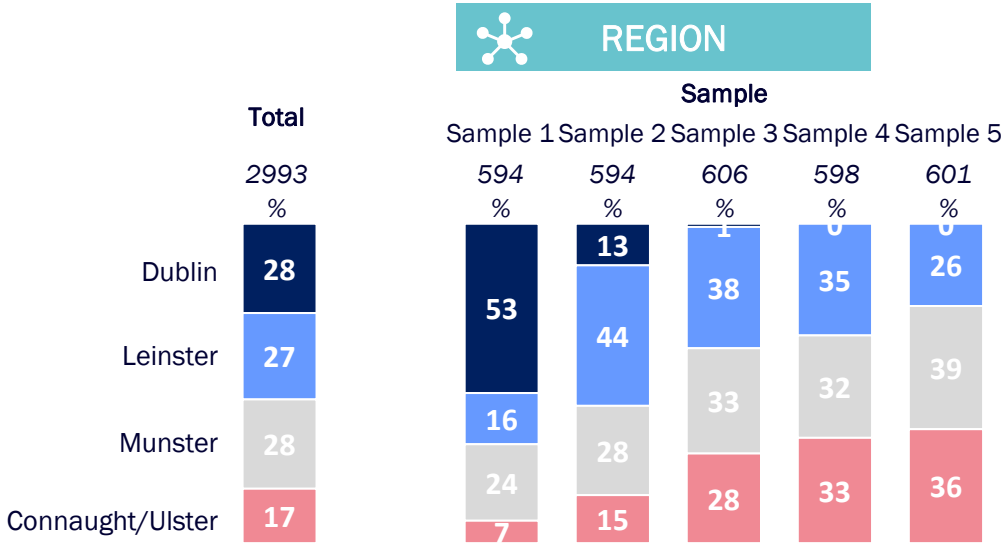
GENDER



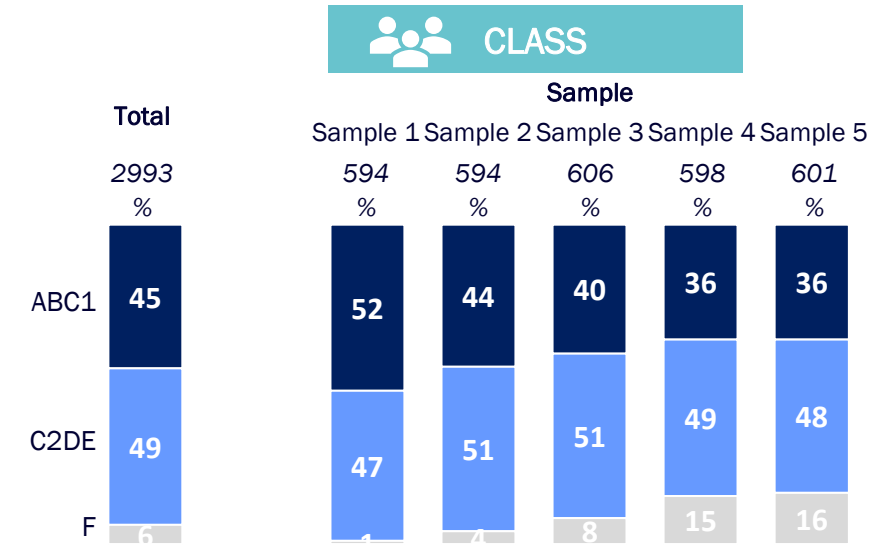
AGE



REGION



CLASS



Analysis of Sample

Sample Detail

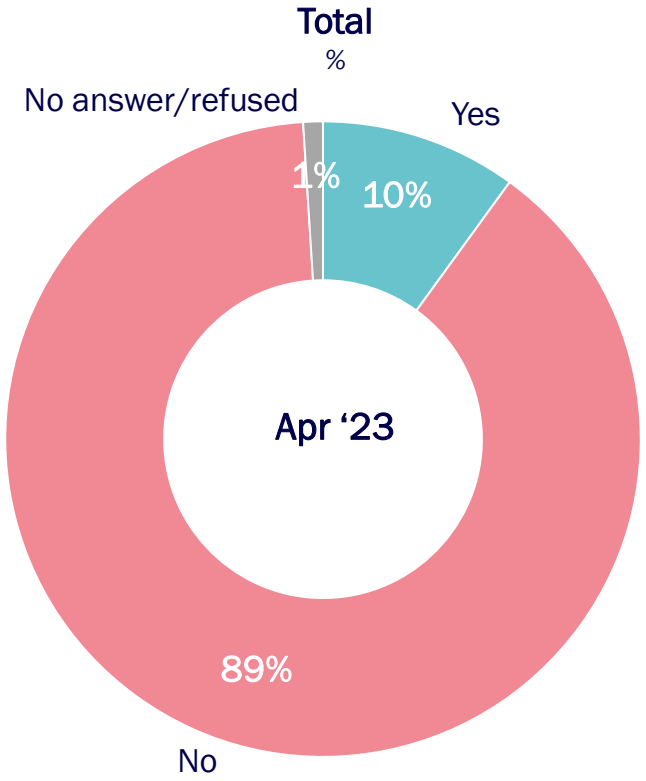
Interviews achieved and corrective weighting applied.

	No of interviews					Weighting applied				
	Sample 1	Sample 2	Sample 3	Sample 4	Sample 5	Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
Total	594	594	606	598	601	48%	13%	18%	15%	7%
Gender	No.	No.	No.	No.	No.	%	%	%	%	%
Male	285	291	291	281	282	48	49	48	47	47
Female	309	303	315	317	319	52	51	53	53	53
Age										
18-34	113	113	109	108	108	20	19	19	18	18
35-49	202	202	200	197	198	34	34	33	33	33
50-64	149	154	164	161	162	25	26	27	27	27
65+	131	125	133	132	132	22	21	22	22	23
*Socio-economic status										
ABC1	309	261	242	215	216	52	44	41	36	36
C2DE	279	303	309	293	288	47	52	51	49	48
F	6	24	48	90	96	1	4	8	15	16

**Socio-economic status is based on market research industry agreed figures (AIMRO)*

Incidence of Disability that limits use to use broadband

Base: All Decision Makers 18+ 2,993

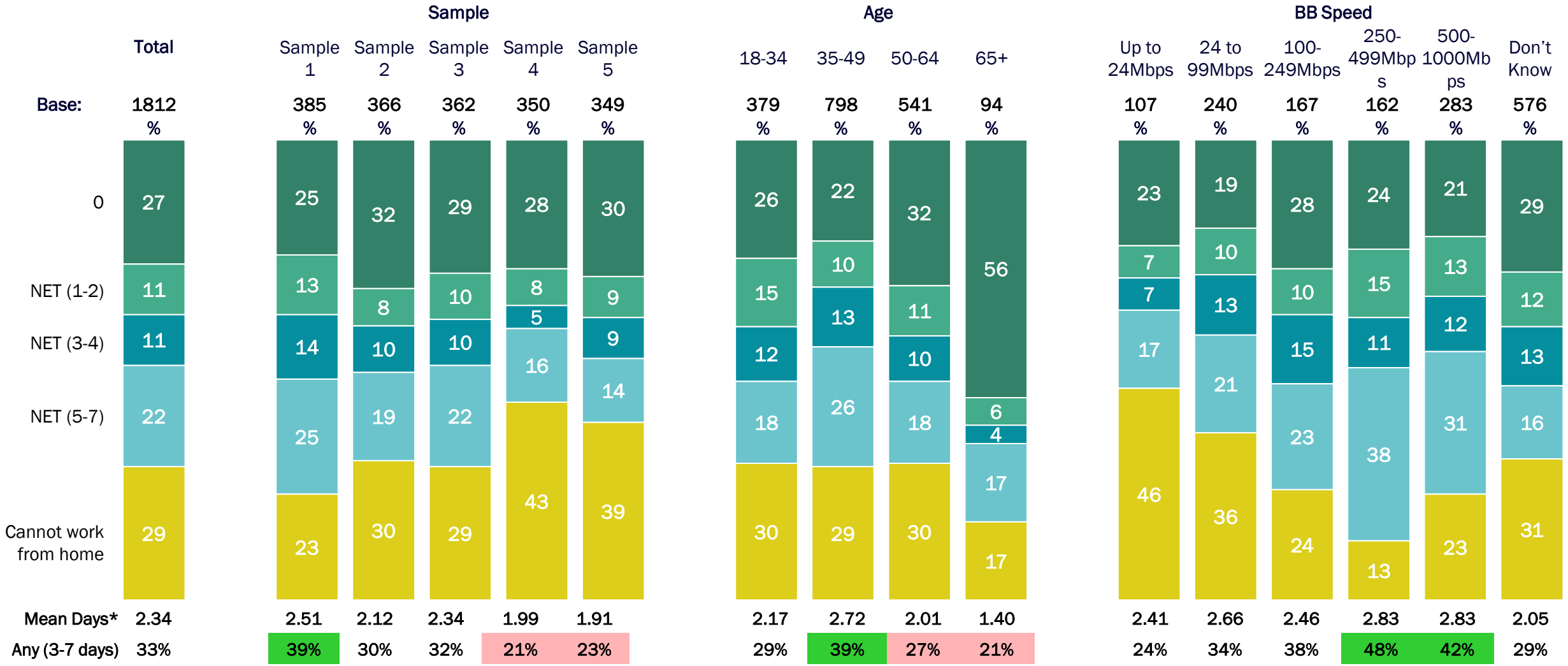


1 in 10 note that they or a member of their household have a disability that may limit their ability to use broadband.

Q.12 Do you or a member of your household have a disability or other condition that you consider might limit your or their ability to use broadband in the home?

Incidence of Working from Home

Base: All Decision Makers Working 1,812



Those in sample area 1, from middle class backgrounds, as well as those aged 35-49 and those with higher broadband speeds are more likely to be working from home for 3 or more days per week.

Q.13 How many days per week, if any, did you typically work from home online?

*Mean includes 0, but not 'Cannot work from home'

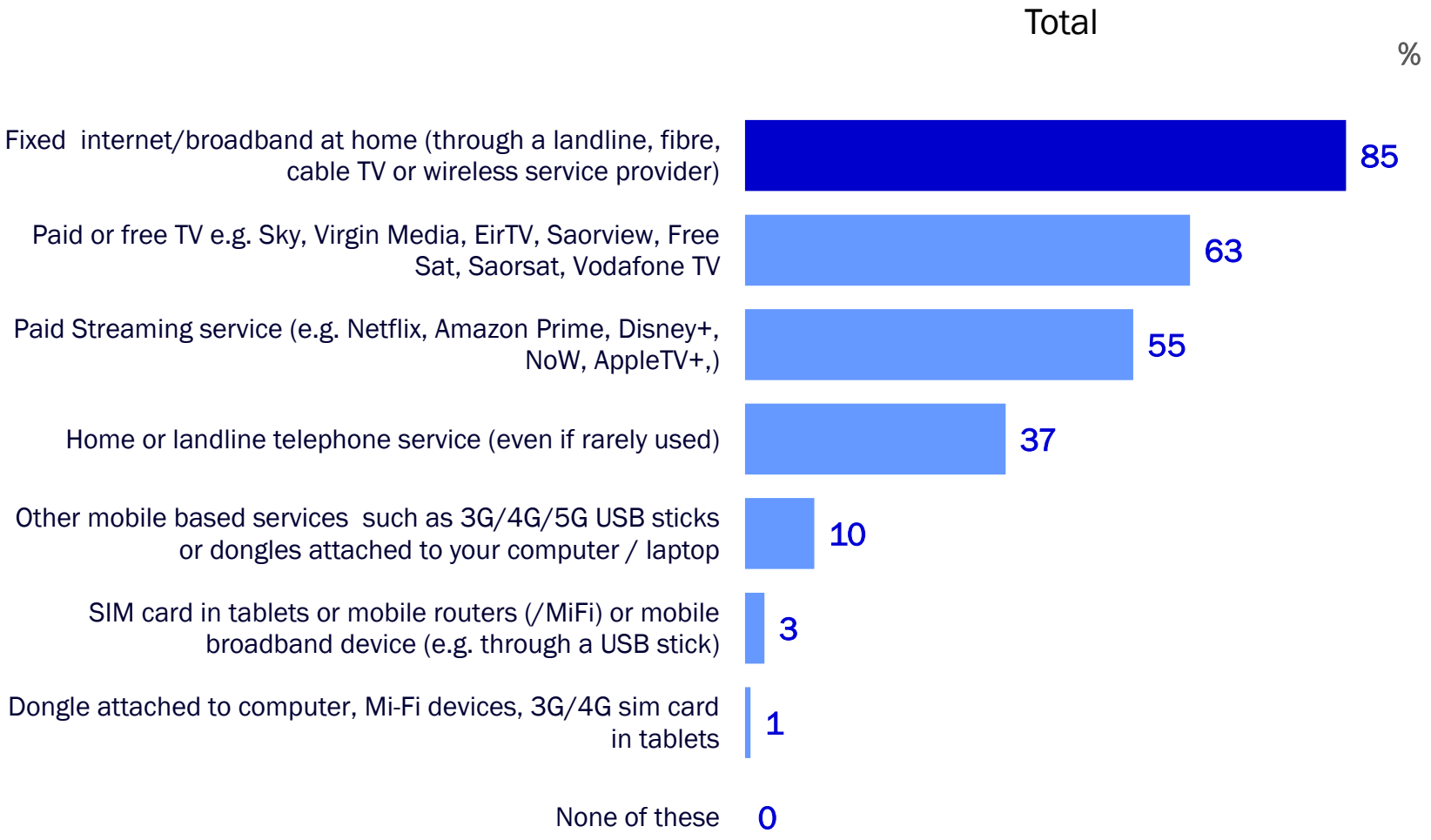
**NOTE: People are likely to be unsure of their exact BB speeds

Incidence of Fixed Broadband

B&A

Access to telecommunications services

Base: All Decision Makers 18+ years- 2,993



Fixed Broadband usage is high with 85% noting usage.

Q.2 Which of the following telecommunications and/or broadcasting services do you currently have access to in your home?

Fixed Broadband usage is highest in Sample 1, while Samples 4 & 5 fall behind.

Base: All Decision Makers 18+ years- 2,993

	Total	Sample				
		Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
	2993	*594*	*594*	*606*	*598*	*601*
	%	%	%	%	%	%
Fixed internet/broadband at home (through a landline, fibre, cable TV or wireless service provider)	85	90	87	83	77	72
Paid or free TV e.g. Sky, Virgin Media, EirTV, Saorview, Free Sat, Saorsat, Vodafone TV	63	65	67	59	60	52
Paid Streaming service (e.g. Netflix, Amazon Prime, Disney+, NoW, AppleTV+,)	55	57	58	54	48	45
Home or landline telephone service (even if rarely used)	37	36	34	39	41	40
Other mobile based services such as 3G/4G/5G USB sticks or dongles attached to your computer / laptop	10	9	6	13	11	13
SIM card in tablets or mobile routers (/MiFi) or mobile broadband device (e.g. through a USB stick)	3	4	3	3	3	5
Dongle attached to computer, Mi-Fi devices, 3G/4G sim card in tablets	1	1	1	1	3	3
None of these	0	-	0	-	0	1

Q.2 Which of the following telecommunications and/or broadcasting services do you currently have access to in your home?

Who doesn't have fixed broadband?

Base: All Decision Makers without fixed internet 599

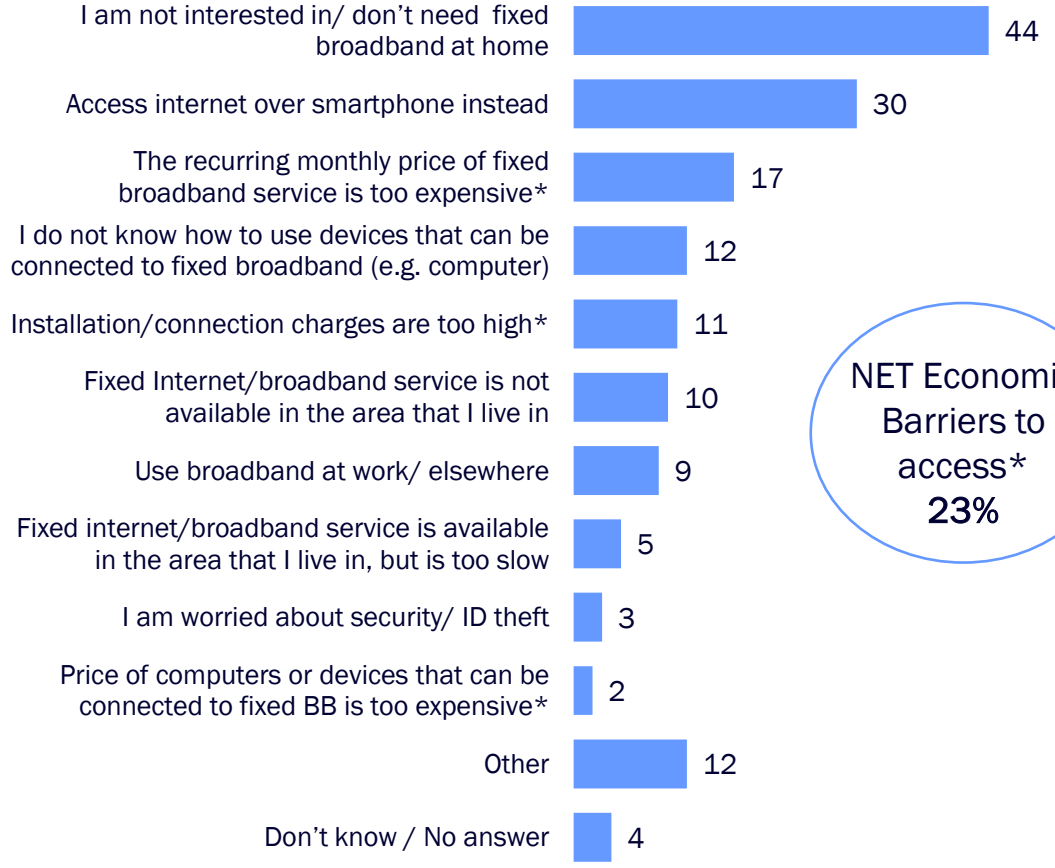
Who doesn't have fixed BB?

15%
Overall note they do not have BB

Higher incidence among.....

- **23%** of 65+
- **21%** of working class **26%** of farmers
- **22%** of Munster **21%** of Conn/Ulster
- **23%** of Sample 4 **28%** of Sample 5
- **22%** of rural
- **19%** of those never WFH

Why no fixed BB?
%



NET Economic Barriers to access* **23%**

Almost half are simply not interested in fixed BB (higher among over 65s). Among those noting no fixed BB availability in their area, this is much more likely in sample areas 4 & 5.

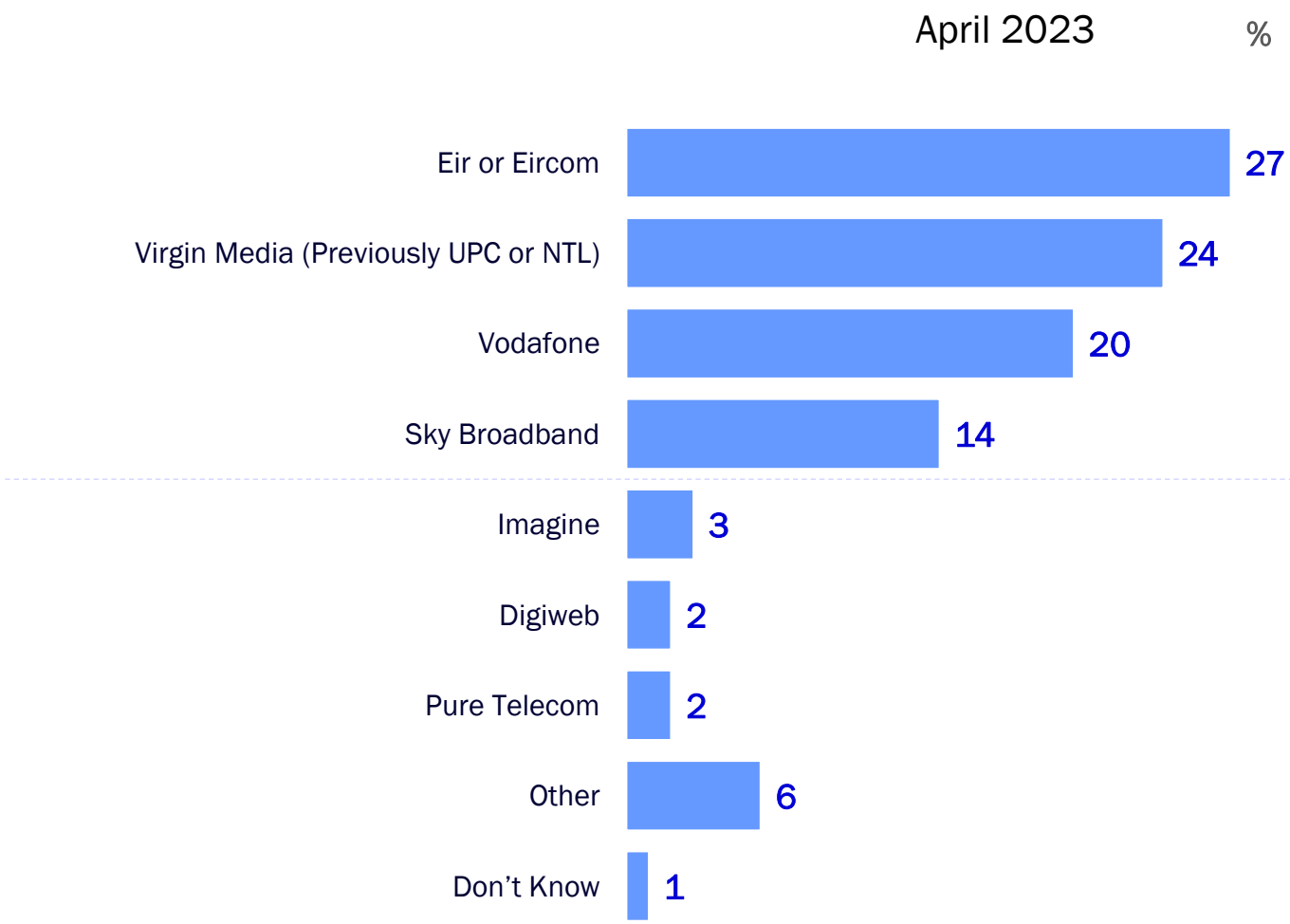
Q.3 You said you are not subscribed to fixed broadband connection at your home, can you explain the reason(s)?

Fixed Broadband Plans

B&A

Broadband Providers

Base: All Decision Makers with fixed internet/BB 2,394



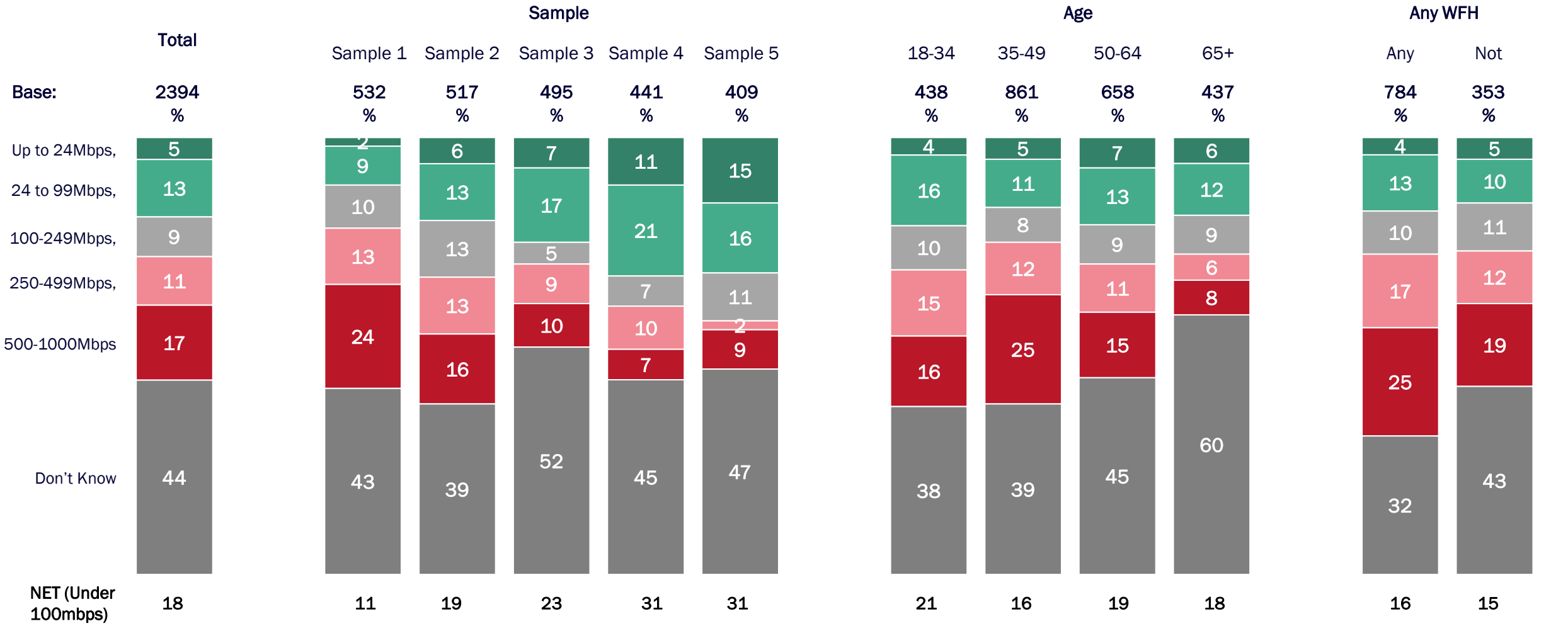
	Age				Sample				
	18-34	35-49	50-64	65+	Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
	438	*861*	*658*	*437*	*532*	*517*	*495*	*441*	*409*
	%	%	%	%	%	%	%	%	%
Eir or Eircom	24	22	30	37	22	26	35	39	34
Virgin Media (Previously UPC or NTL)	22	24	24	26	41	15	4	1	0
Vodafone	20	23	16	19	15	32	22	23	26
Sky Broadband	16	17	14	9	15	17	17	8	9
Imagine	3	3	4	2	-	2	2	12	13
Digiweb	2	3	1	1	1	2	5	2	2
Pure Telecom	3	3	2	1	1	3	5	2	4
Other	7	5	8	3	4	2	8	12	12
Don't Know	3	0	1	1	2	1	1	0	1

Eir, Virgin Media, and Vodafone all have a strong foothold in the market with a fifth or more of the market each

Q.14 Who is your current home broadband service provider?

Reported advertised Broadband download Speeds

Base: All Decision Makers with fixed internet/BB 2,394

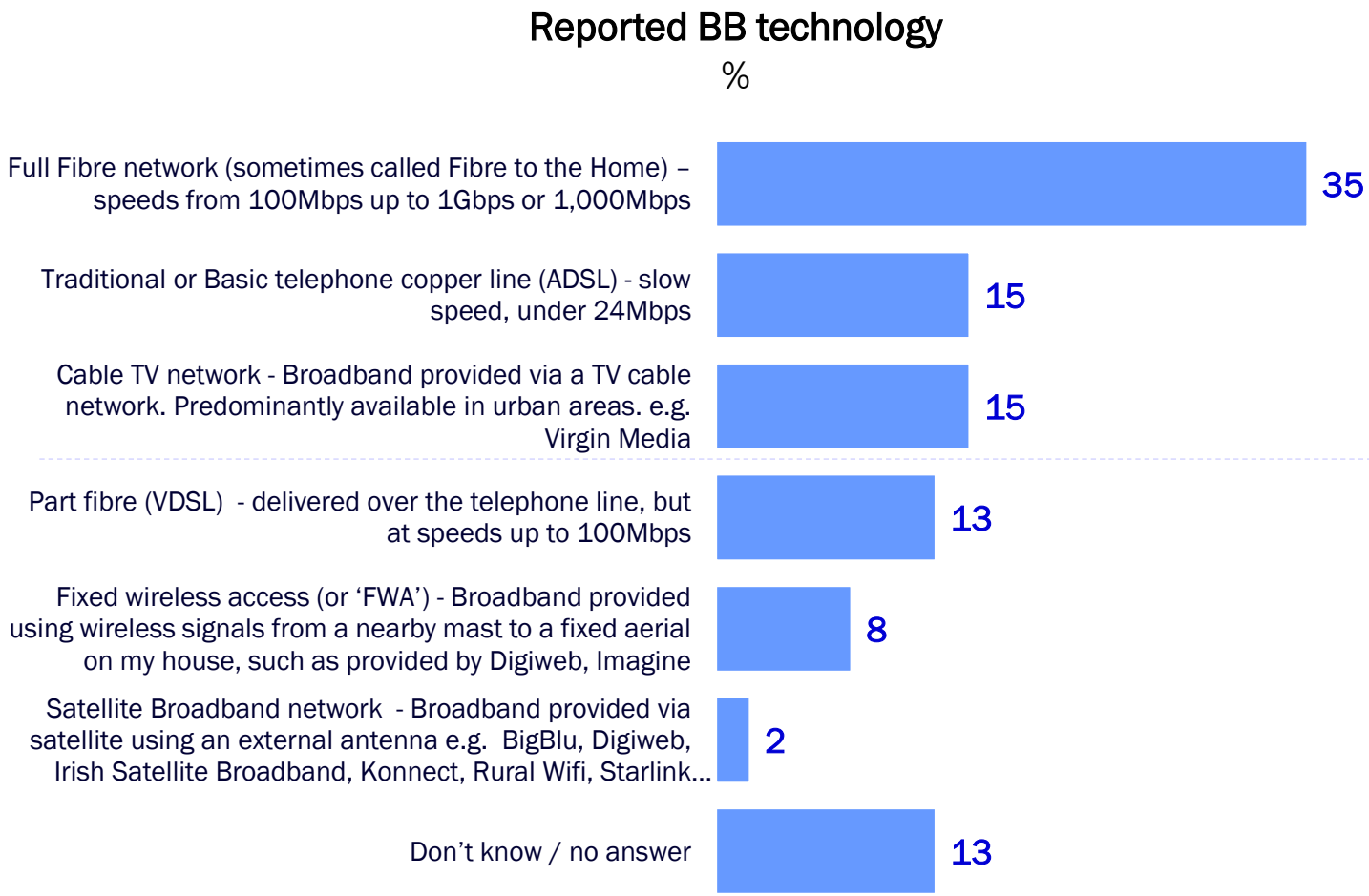


Among those who are aware of their bb speeds, almost 1 in 5 have over 500mbps, while only 5% have the lowest speeds of up to 24mbps. It should be noted here however, that a significant minority were unaware of their speeds, increasing to 3 in 5 of those over 65. Those working from home are more likely to have speeds of 250+mbps.

Q.15 What is the (advertised) download speed of the broadband connection that you subscribed to?

Reported Broadband Technology used

Base: All Decision Makers with fixed internet/BB 2,394



	Age				Sample				
	18-34	35-49	50-64	65+	Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
	438	*861*	*658*	*437*	*532*	*517*	*495*	*441*	*409*
	%	%	%	%	%	%	%	%	%
Full Fibre network (sometimes called Fibre to the Home) – speeds from 100Mbps up to 1Gbps or 1,000Mbps	35	41	31	27	39	40	29	25	26
Traditional or Basic telephone copper line (ADSL) - slow speed, under 24Mbps	10	12	16	22	9	14	22	23	25
Cable TV network - Broadband provided via a TV cable network. Predominantly available in urban areas. e.g. Virgin Media	17	14	14	15	23	12	5	4	6
Part fibre (VDSL) - delivered over the telephone line, but at speeds up to 100Mbps	13	12	13	14	11	19	17	13	9
Fixed wireless access (or 'FWA') - Broadband provided using wireless signals from a nearby mast to a fixed aerial on my house, such as provided by Digiweb, Imagine	9	7	9	6	4	3	11	18	18
Satellite Broadband network - Broadband provided via satellite using an external antenna e.g. BigBlu, Digiweb, Irish Satellite Broadband, Konnect, Rural Wifi, Starlink...	3	3	2	1	1	2	3	9	6
Don't know / no answer	12	10	15	15	15	11	13	8	10

Over a third claim to have full fibre, highest in Sample 2. Traditional and cable TV connections play a significant role also, though driven by different sample areas – traditional seen more commonly in samples 3, 4,& 5, while cable TV connections is seen more often in Sample 1.

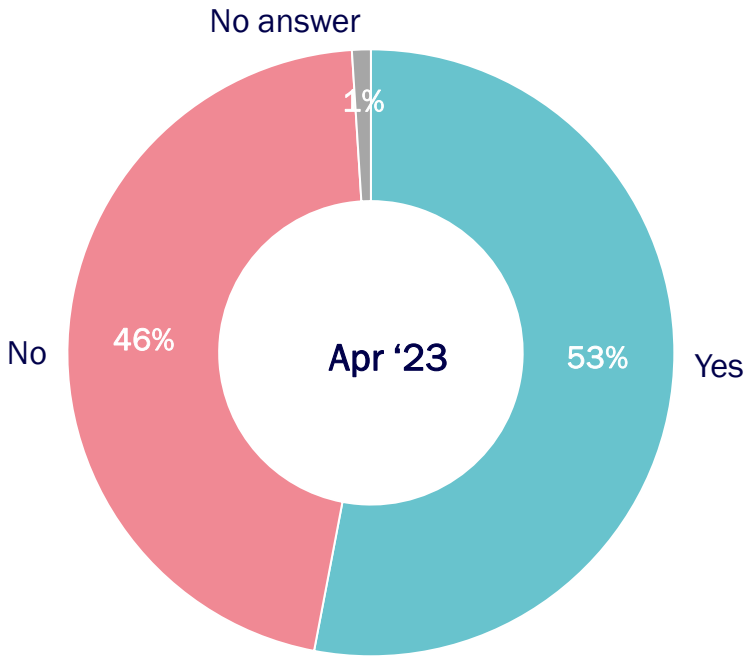
Q.16 Do you know what technology is being used to deliver your fixed broadband connection?

Incidence of Bundle Packages

Base: All Decision Makers with fixed internet/BB 2,394

Q.4) Proportion of broadband services purchased as part of a bundle

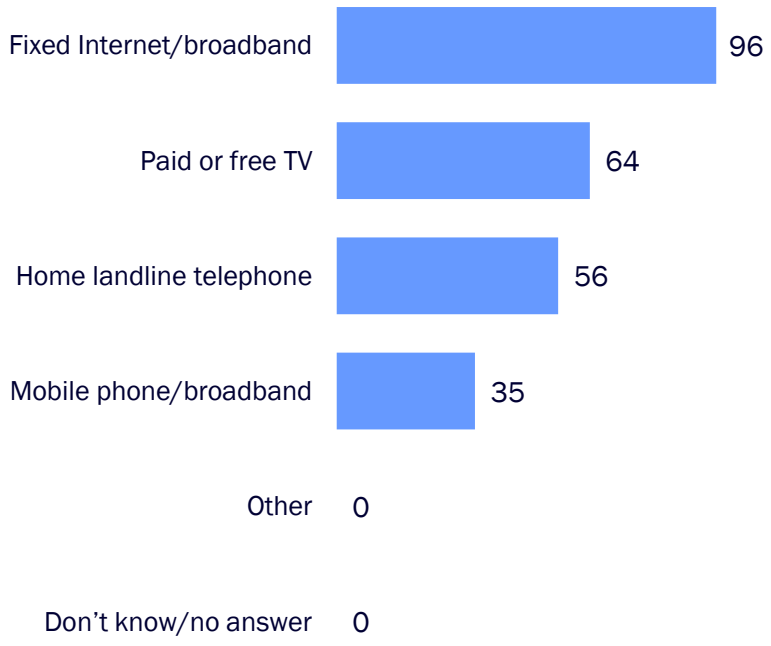
%



Q.5) Services purchased as part of a bundle

Base: All who purchased bundle/package 1,274

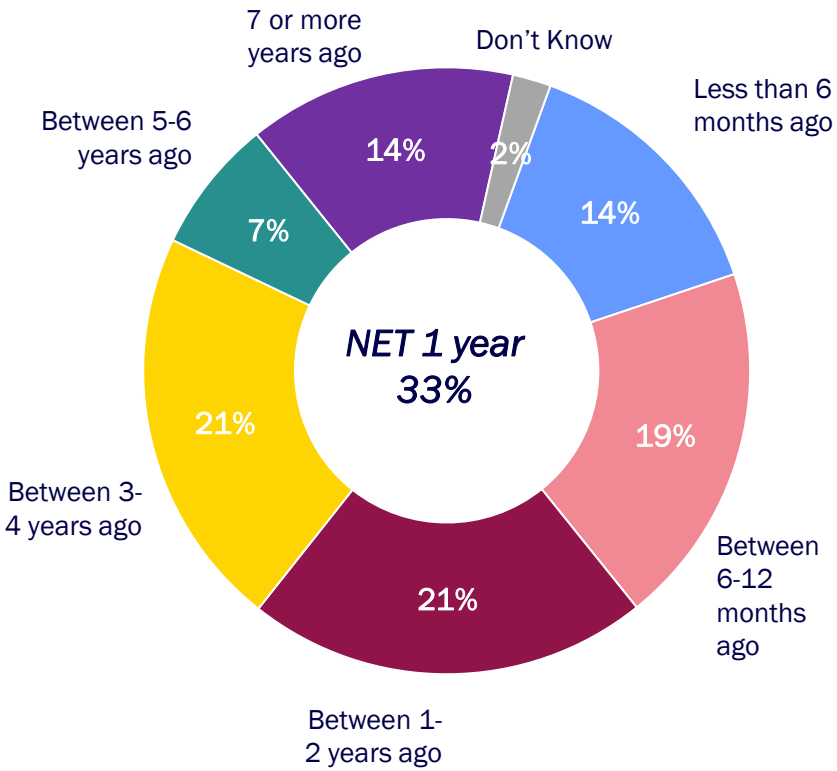
%



Q.6) Time since subscribing to current bundle

Base: All who purchased package 1,274

%



Over half have some form of bundle package involving their telecoms services, with near universal inclusion of broadband in their bundles. One in three have started their bundle package within the last year.

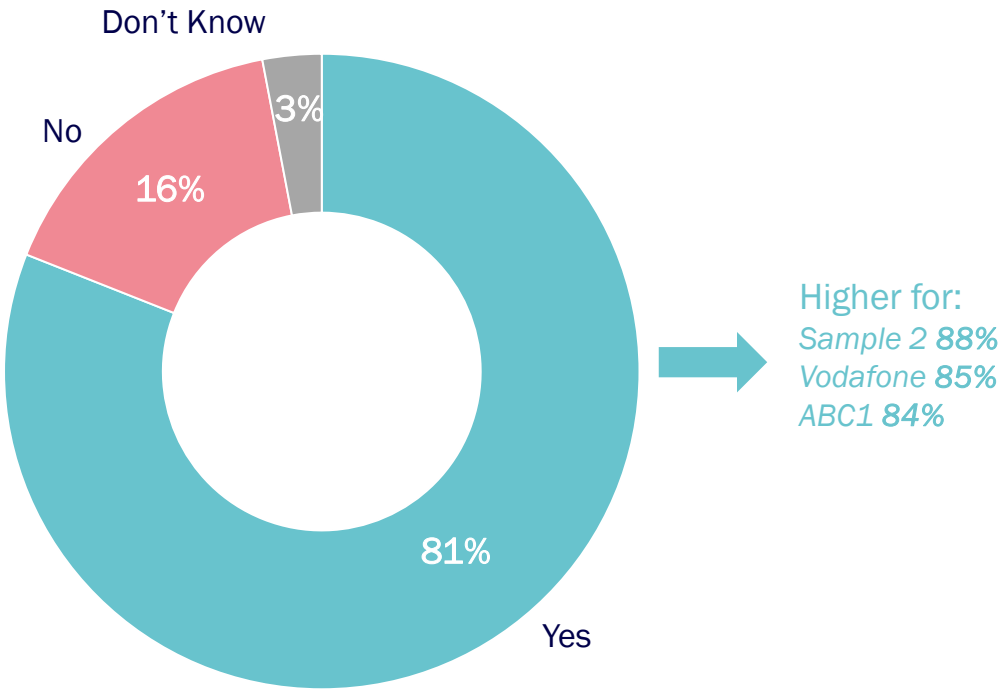
Q.4 Did you decide to purchase these as part of a single package or bundle for an overall single price?
Q.5 Which of the following services are included in your telecommunications bundle/package?
Q.6 How long ago did you first subscribe to your current bundle/internet service?

Incidence and Duration of Broadband Contracts

Base: All Decision Makers with fixed internet/BB 2,394

Q.7) Proportion in contract

%

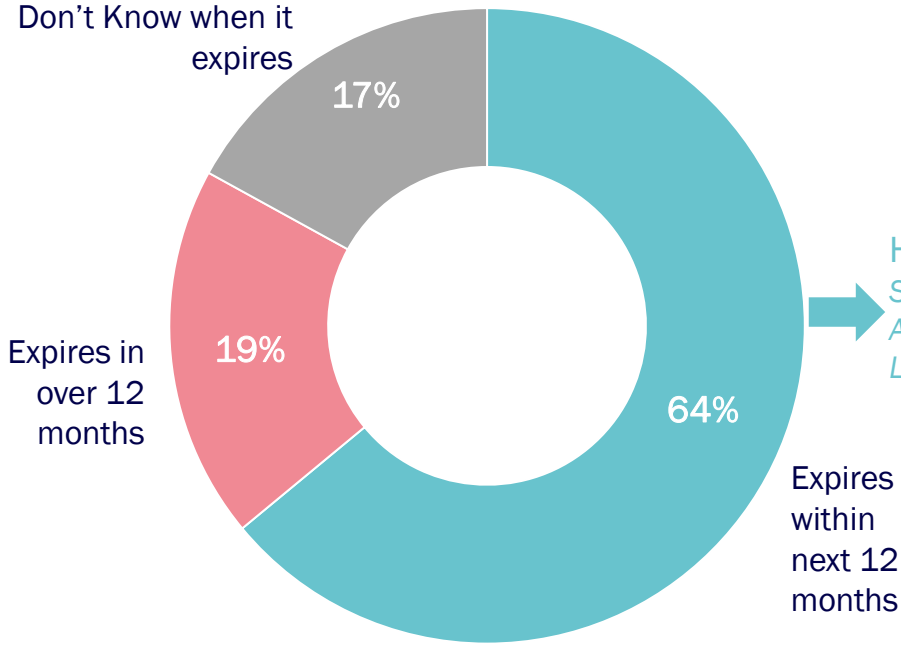


Higher for:
Sample 2 ***88%***
Vodafone ***85%***
ABC1 ***84%***

Q.7a) Time till Contract expires

Base: All in contract with BB service provider 1955

%



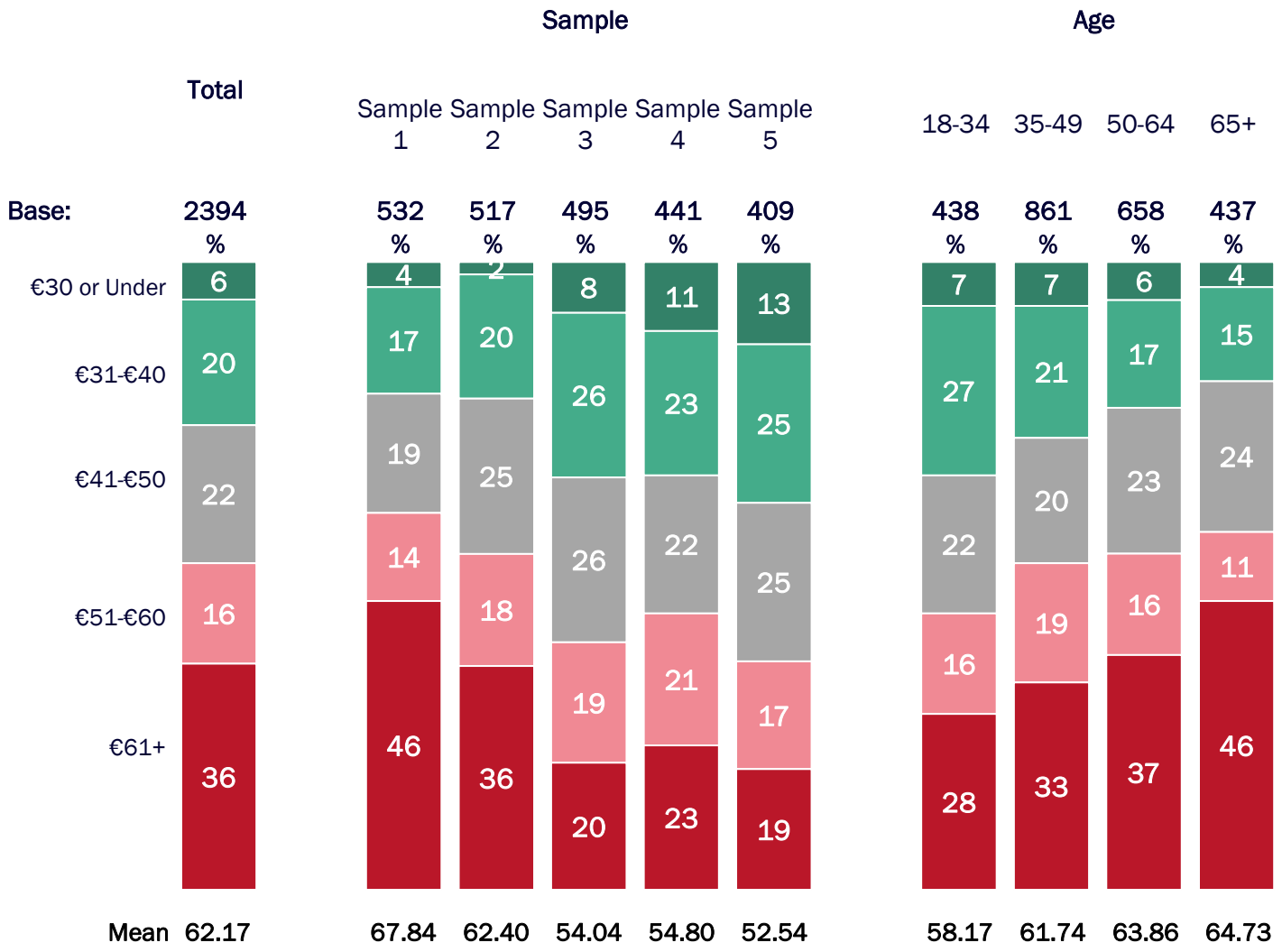
Higher for:
Sample 3 ***72%***
ABC1 ***69%***
Likely to Switch BB ***70%***

The vast majority have a contract in place for broadband service provision. These contracts appear to most likely be 12 months in length, with almost 2 in 3 noting their contract expires within the next 12 months. Those likely to switch broadband providers are also more likely to have their broadband contracts expire within the next 12 months. However, there is a substantial number (1 in 5) with contracts longer than 12 months in length.

Q.7 Are you currently in a contract with your broadband service provider?
Q.7a When does this contract expire?

Cost of Broadband / bundle plans

Base: All Decision Makers with fixed internet/BB 2,394

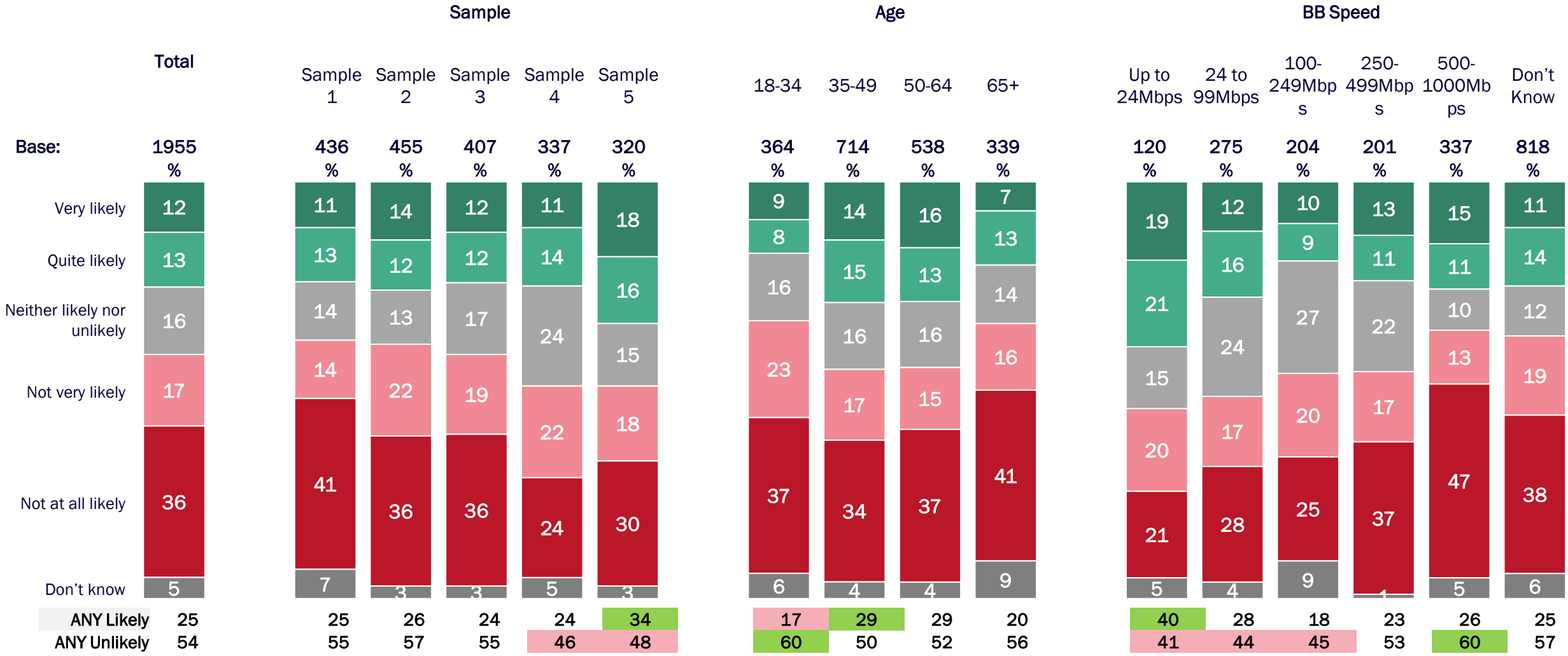


Although the average cost is €62, the cost varies significantly depending on the various cohorts. Those living in samples 3, 4, & 5 have a significantly lower average cost, most likely reflecting the higher incidence of comparably weaker download speeds (correlation is seen between higher bb speeds and higher cost, and vice versa).

Q.17 How much does your monthly broadband/bundle cost?

Likelihood of Switching Broadband Supplier in Next 12 Months

Base: All Decision Makers in contract with BB service provider 1955

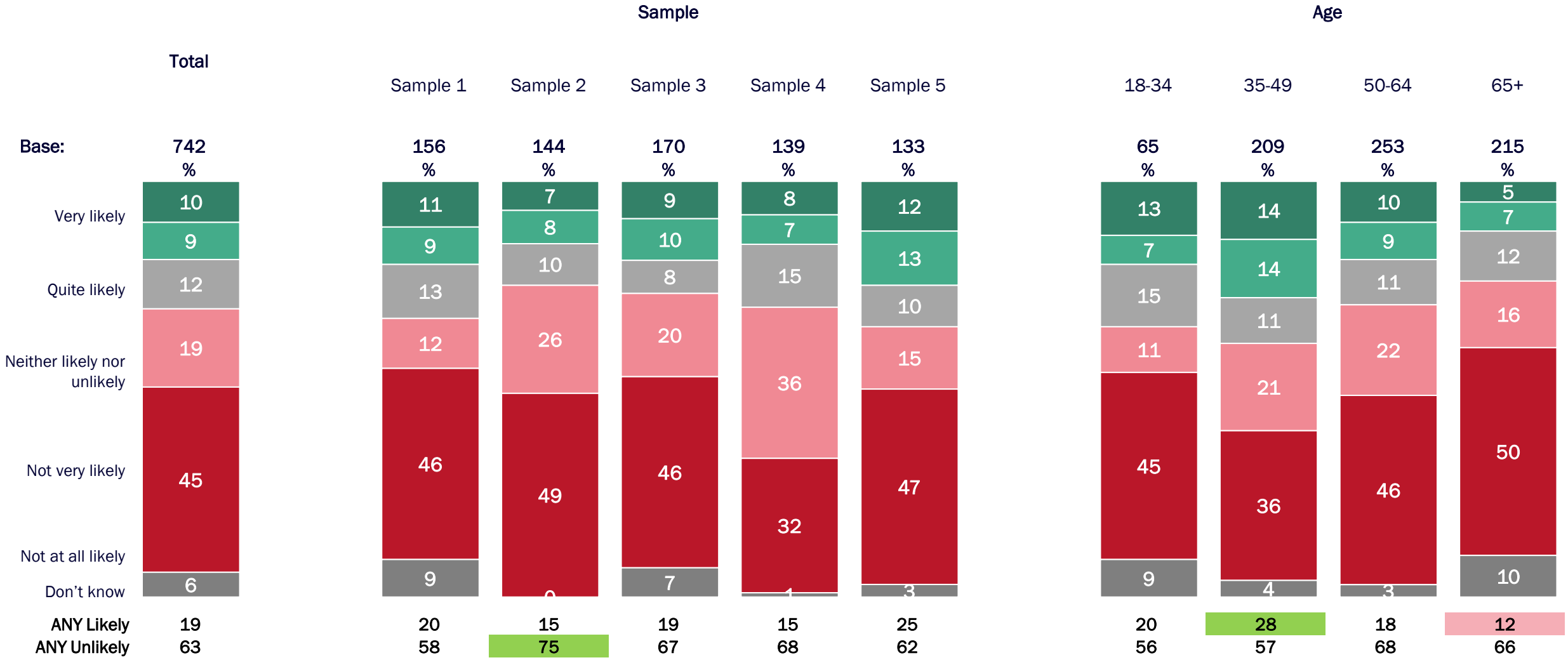


There is a clear stickiness among customers - overall 53% not inclined to switch in the coming 12 months. However, there are pockets of higher likelihood of switching , increasing from 1 in 4 overall, to 34% in Sample 5, and 40% of those with BB speeds of up to 24 mbps. There is an appetite to improve upon comparably poorer services.

Q.8 How likely, if at all, are you to consider switching your home broadband supplier within the next 12 months?

Likelihood of Removing Landline from Bundle in Next 12 Months

Base: All with landline service 742



Among those with landlines included in their bundle, over 3 in 5 are not planning to remove this service. This is most significant among those over 65 years.

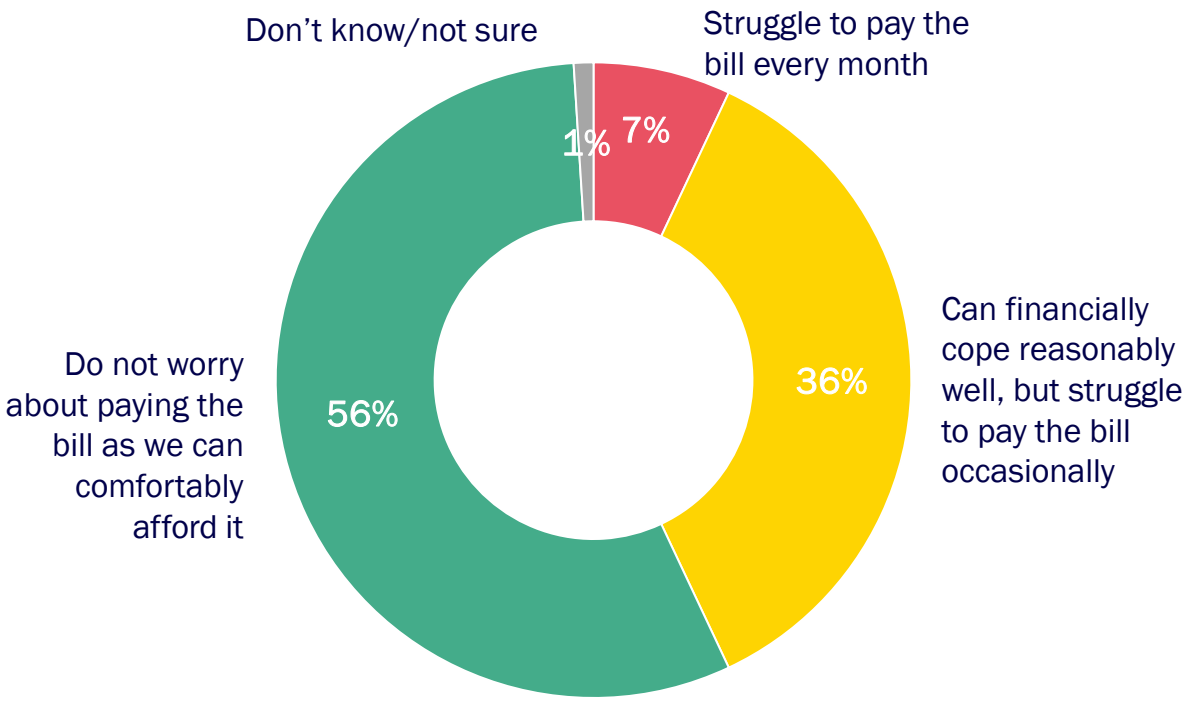
Q.9 How likely are you to consider removing your landline from your bundle within the next 12 months?

Affordability and Necessity of Broadband

Base: All Decision Makers with fixed internet/BB 2,394

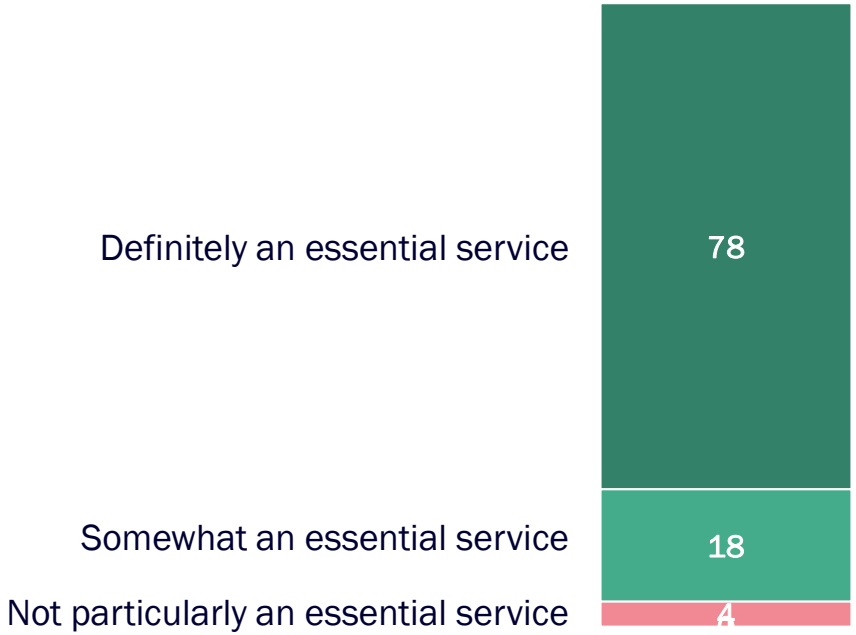
Q.18) Ability to afford Broadband

%



Q.19) Broadband an essential service?

%



NET (Essential)	96
NET (Not Essential)	4

Over 2 in 5 have struggled to pay for broadband at some stage, with 7% noting they struggle every month. Reliance on broadband clearly very high with almost 4 in 5 noting bb is definitely an essential service.

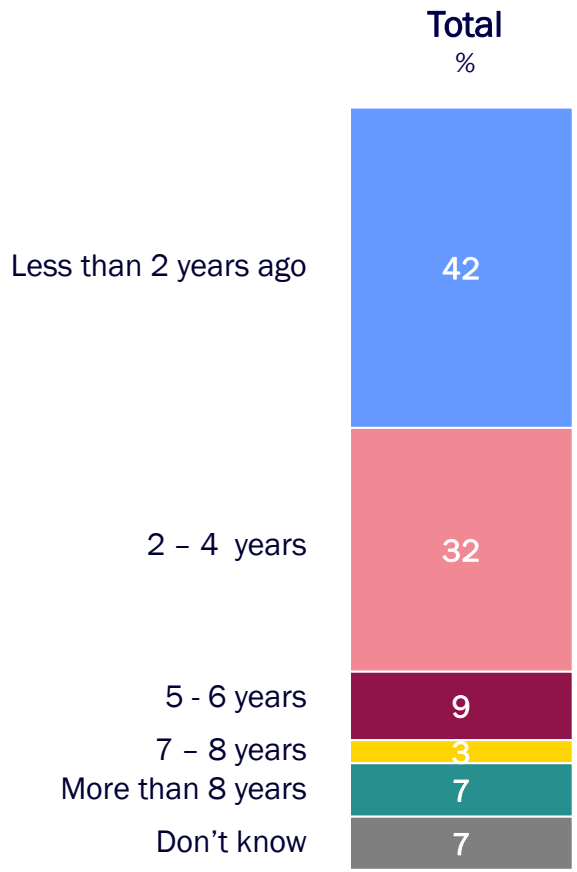
Q.18 How would you rate your household's ability to afford a home broadband service?
Q.19 To what extent would you consider broadband an essential service that you or your household cannot live without (for whatever reason)?

Device Usage on Household Broadband

B&A

Length of Time using Current Router

Base: All Decision Makers with fixed internet/BB 2,394

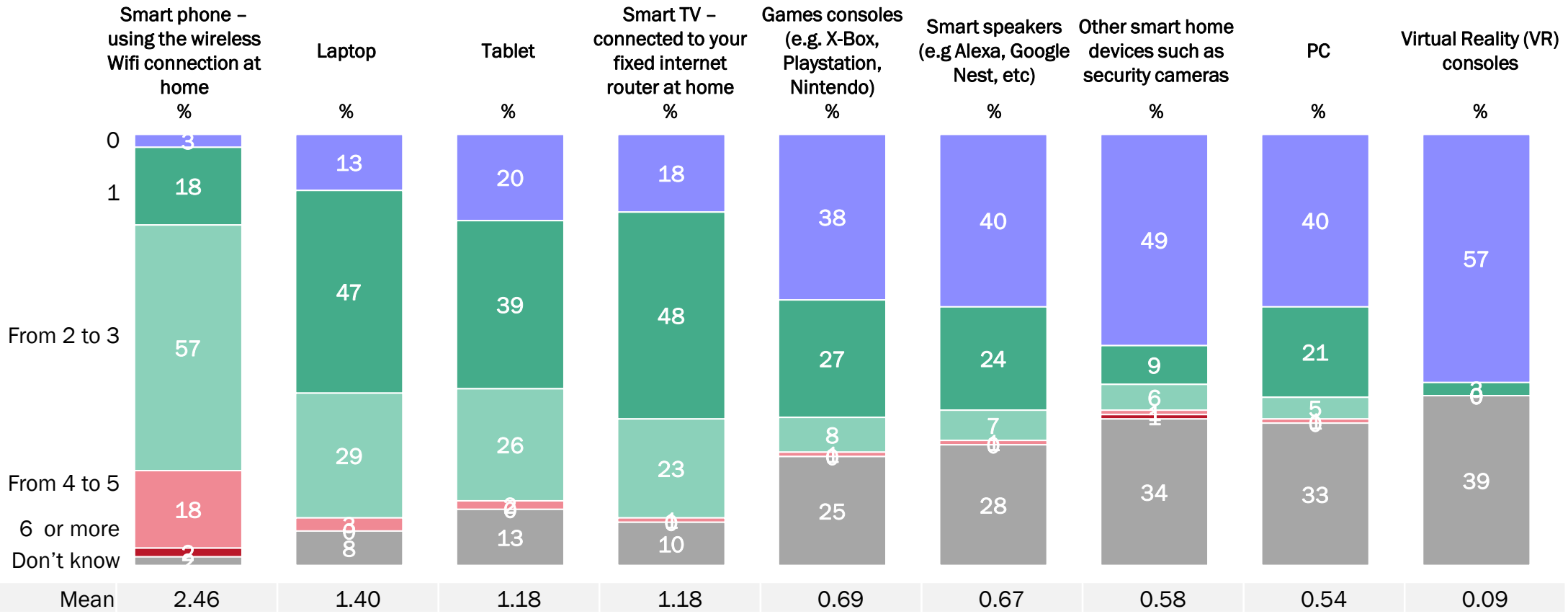


3 in 4 have had their router for 4 years or less, with 2 in 5 having their router for less than two years.

Q.20 How long ago was your router installed?

Number of Devices, by type, Connecting to Household Broadband

Base: All Decision Makers with fixed internet/BB 2,394

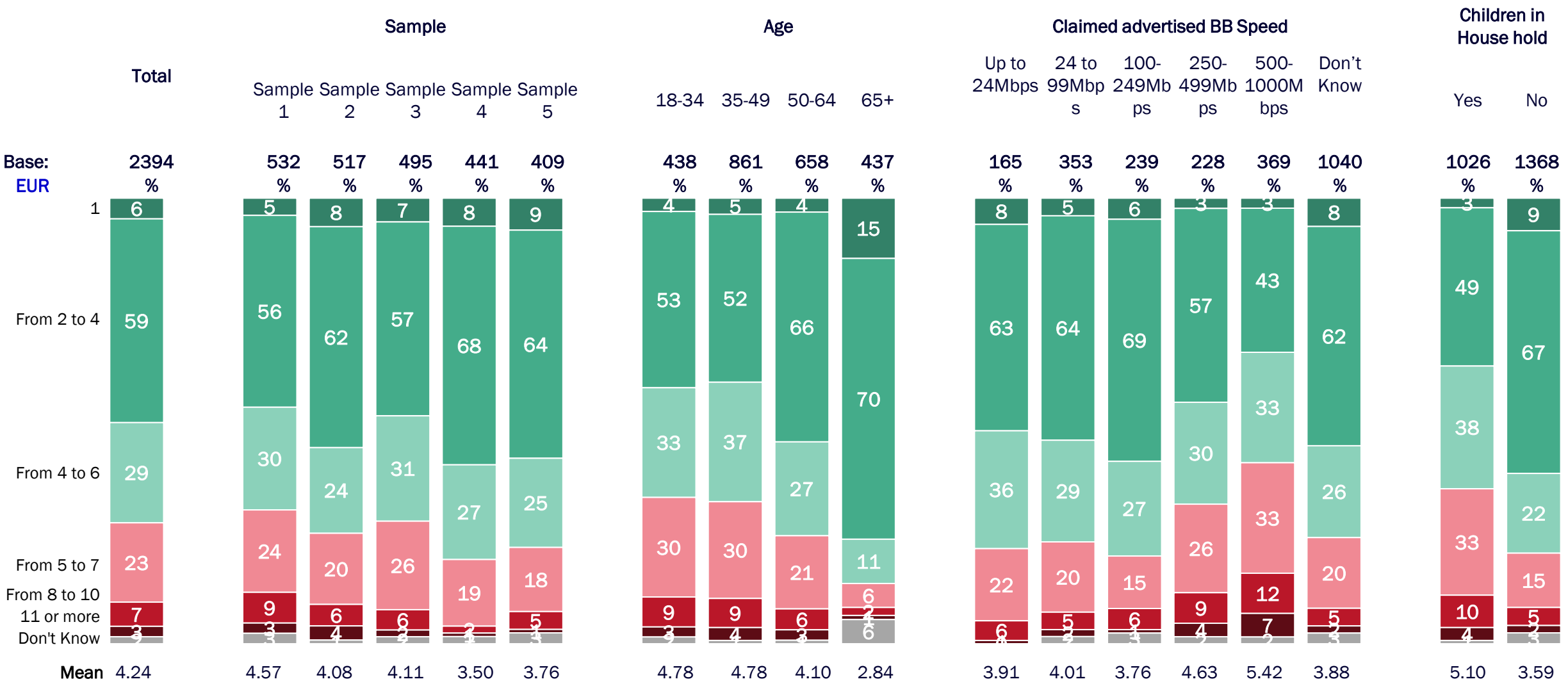


Smart phones and Laptops appear to be the most utilized in households.

Q.21 How many of the following devices are connected to your home broadband connection?

Claimed Total No. of Devices Connected to Home Broadband

Base: All Decision Makers with fixed internet/BB 2,394

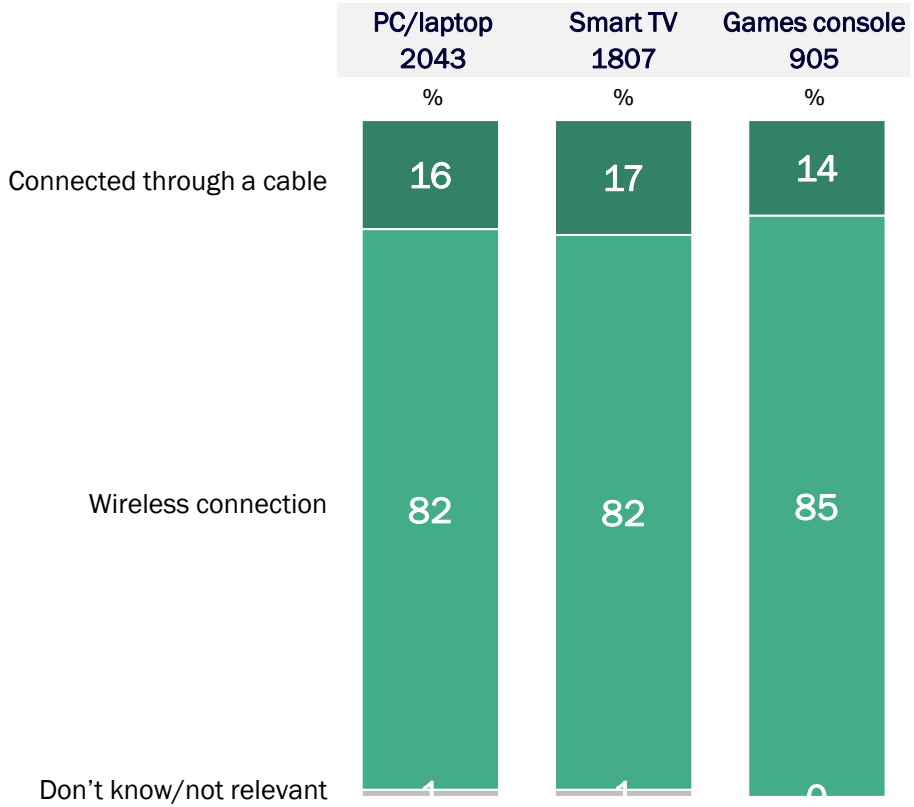


On average there are 4 devices connected to home broadband per household, increasing to an average of 5 among middle class cohorts, those aged under 50, those with kids in the household, and those with broadband speeds of over 250mbps.

Q.24 How many devices in total are connected to your home broadband connection?

Type of in home Connection Utilised

Base: All Decision Makers with PC/Laptop/Smart TV/Games console

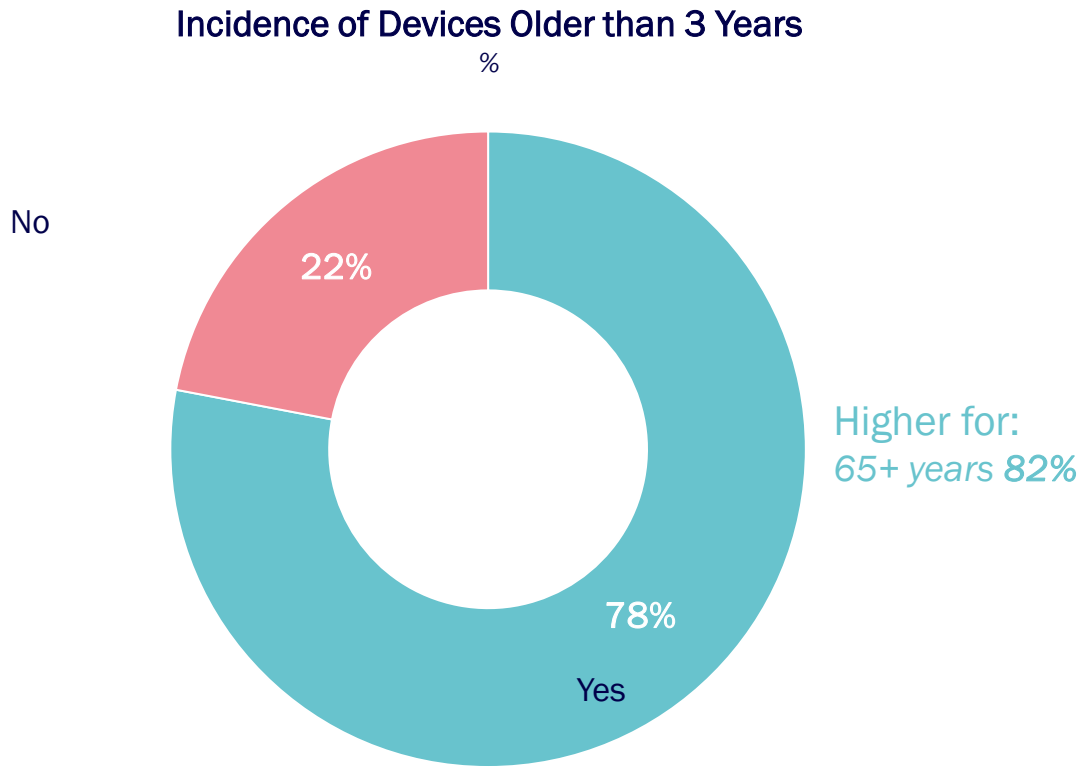


Wireless connections are the clear method used most often to connect PCs/laptops, smart TVs, and Games Consoles.

Q.22 Please indicate whether you typically connect the following to the Internet using a wire (ethernet cable) linked to the Router or wirelessly (using WiFi)?

Incidence of Devices Older than 3 Years

Base: All Decision Makers with fixed internet/BB 2,394



Higher for:
65+ years ***82%***

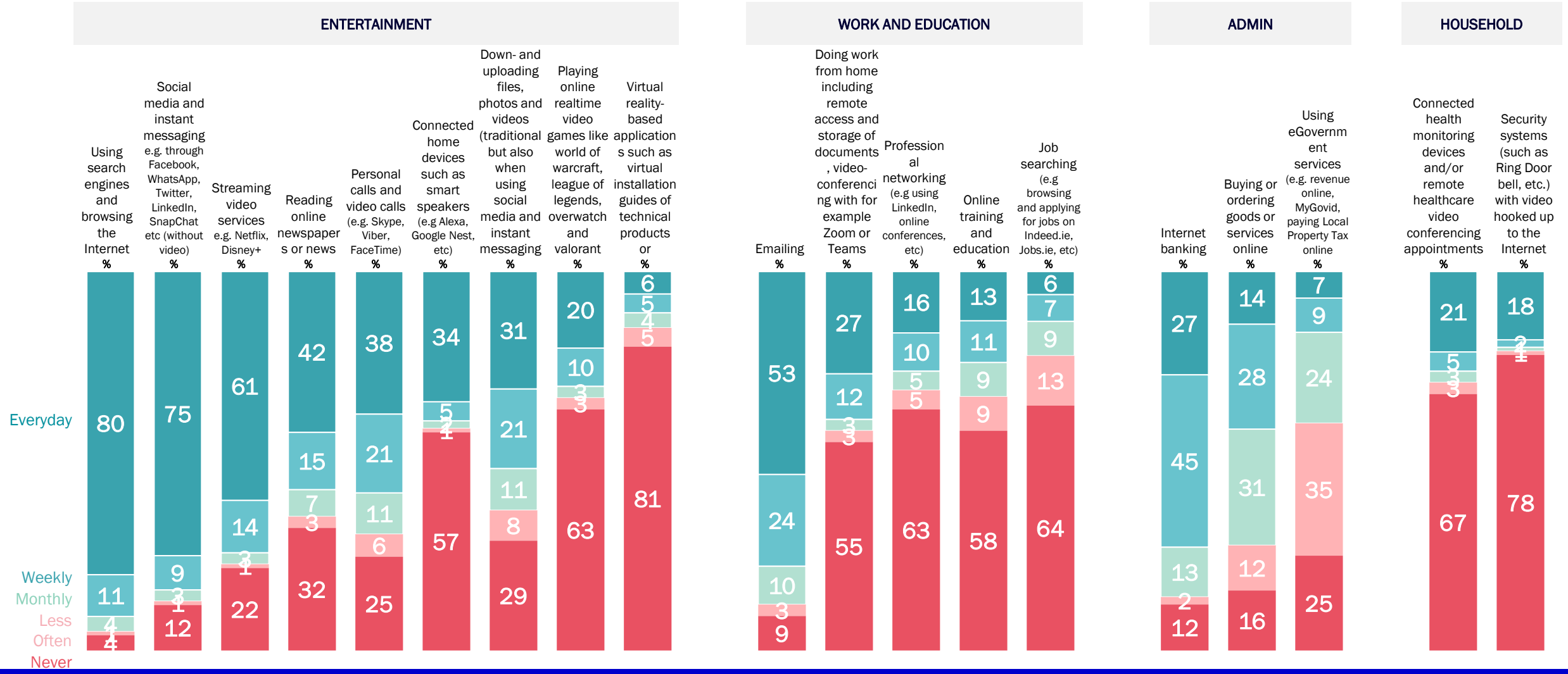
Over 3 in 4 note that at least one device they regularly use to connect to broadband is older than 3 years. This is more common among those over 65 years of age.

Q.23 Are any of the devices which you regularly use to access the Internet at home (such as a smartphone, smart TV, laptop, tablet), more than 3 years old?

Broadband usage

Use of Home Broadband to Access Various Online Services

Base: All Adults with fixed internet/BB 2,394



Curiosity, entertainment and communication are the key drivers of every day broadband usage in the household.
Online shopping and internet banking are also key drivers though less frequency.
Lowest usage of broadband seen in relation to household-based usage such as security systems and healthcare systems.

Q.25 How often, if at all, do you or other people in your household use home broadband (including WiFi) for each of the following services?

Everyday Use of Home Broadband to Access Various Services Online

Base: All Decision Makers with fixed internet/BB 2,394

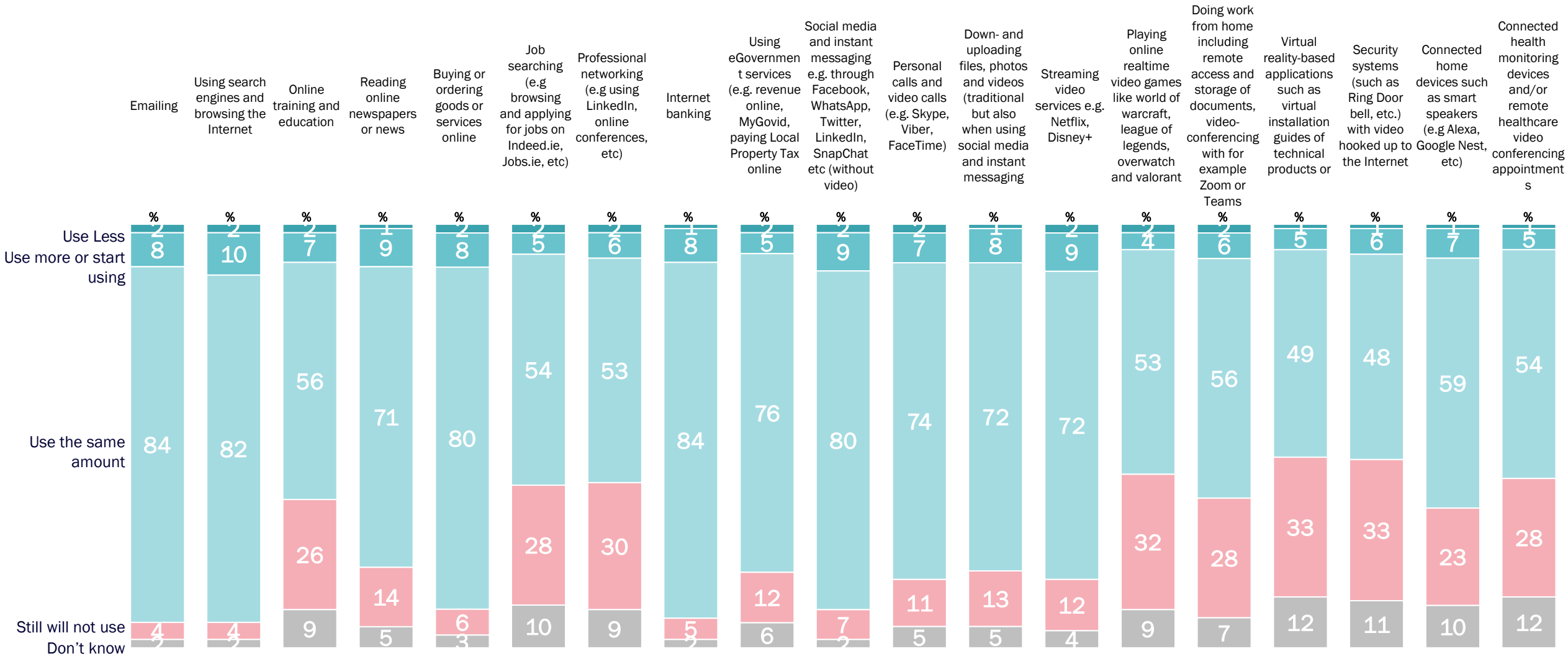
Everyday Use	Total	Sample					Age				Gender	
		Sample 1	Sample 2	Sample 3	Sample 4	Sample 5	18-34	35-49	50-64	65+	Male	Female
Base	*2394*	*532*	*517*	*495*	*441*	*409*	*438*	*861*	*658*	*437*	*1132*	*1262*
	%	%	%	%	%	%	%	%	%	%	%	%
Using search engines and browsing the Internet	80	84	71	82	72	80	89	86	79	62	80	80
Social media and instant messaging e.g. through Facebook, WhatsApp, Twitter, LinkedIn, SnapChat etc (without video)	75	76	74	77	70	71	89	85	75	43	72	78
Streaming video services e.g. Netflix, Disney+	61	67	59	57	50	46	77	71	60	27	61	60
Emailing	53	60	52	46	38	49	60	63	50	32	54	52
Reading online newspapers or news	42	45	39	37	38	45	33	49	47	34	45	40
Personal calls and video calls (e.g. Skype, Viber, FaceTime)	38	43	44	33	21	29	47	44	34	24	37	39
Connected home devices such as smart speakers (e.g Alexa, Google Nest, etc)	34	40	33	26	30	26	38	43	33	17	35	34
Down- and uploading files, photos and videos (traditional but also when using social media and instant messaging	31	36	29	25	23	26	43	36	26	15	33	29
Internet banking	27	32	26	19	25	20	34	32	26	16	28	27
Doing work from home including remote access and storage of documents, video-conferencing with for example Zoom or Teams	27	32	22	21	21	19	29	37	26	9	29	25
Connected health monitoring devices (e.g FitBit, Whoop, etc) and/or remote healthcare video conferencing appointments (e.g Web Doctor, etc)	21	23	23	21	16	14	21	27	22	9	20	22
Playing online realtime video games like world of warcraft, league of legends, overwatch and valorant	20	24	18	19	14	12	30	25	16	6	22	19
Security systems (such as Ring Door bell, etc.) with video hooked up to the Internet	18	23	20	9	12	8	18	22	16	12	19	16
Professional networking (e.g using LinkedIn, online conferences, etc)	16	21	15	9	11	10	21	21	14	5	18	15
Buying or ordering goods or services online	14	17	11	9	10	11	16	17	12	6	12	15
Online training and education	13	16	13	8	9	9	21	15	11	3	12	13
Using eGovernment services (e.g. revenue online, MyGovid, paying Local Property Tax online	7	9	3	4	9	6	8	8	6	6	8	7
Job searching (e.g browsing and applying for jobs on Indeed.ie, Jobs.ie, etc)	6	8	7	4	4	7	9	7	5	4	6	6
Virtual reality-based applications such as virtual installation guides of technical products or a virtual guide through a tourist destination or the use of a new product/service	6	7	6	3	5	4	7	6	5	4	5	7

Those in Sample 1, aged under 50, and from middle class backgrounds are more likely to use most services every day.

Q.25 How often, if at all, do you or other people in your household use home broadband (including WiFi) for each of the following services?

Expectations of change in Service Usage in the Next 12 Months

Base: All Decision Makers with fixed internet/BB 2,394



The vast majority indicate that, across all services, the level of usage is expected to remain the same (or they will still not use the service).

Q.26 Looking at the next 12 months, do you expect to use, or start to use, the following internet based services more, less, or use the same amount?

Expectations of *Increased* Service Usage in the Next 12 Months

Base: All Decision Makers with fixed internet/BB 2,394

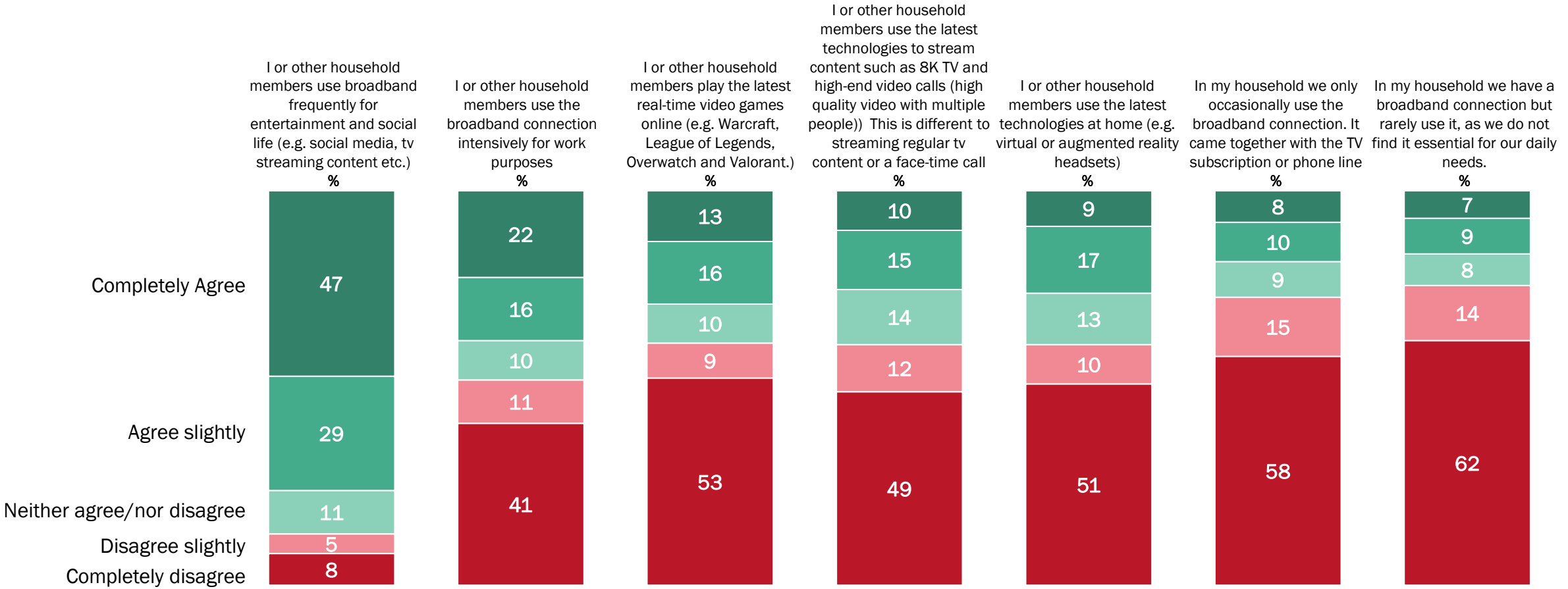
Any Using More	Total	Sample					Age			
		Sample 1	Sample 2	Sample 3	Sample 4	Sample 5	18-34	35-49	50-64	65+
Base	*2394*	*532*	*517*	*495*	*441*	*409*	*438*	*861*	*658*	*437*
	%	%	%	%	%	%	%	%	%	%
Emailing	8	8	9	7	13	5	10	6	9	10
Using search engines and browsing the Internet	10	12	10	6	13	9	15	8	9	12
Online training and education	7	8	5	6	11	4	10	8	7	5
Reading online newspapers or news	9	9	8	5	15	5	8	8	8	13
Buying or ordering goods or services online	8	8	9	5	11	5	10	7	7	9
Job searching (e.g browsing and applying for jobs on Indeed.ie, Jobs.ie, etc)	5	6	4	4	7	5	10	5	5	2
Professional networking (e.g using LinkedIn, online conferences, etc)	6	7	5	2	7	4	6	7	3	7
Internet banking	8	8	8	5	12	5	10	7	6	10
Using eGovernment services (e.g. revenue online, MyGovid)	5	6	3	2	7	4	6	5	5	5
Social media and instant messaging e.g. through Facebook, WhatsApp, Twitter, LinkedIn, SnapChat etc (without video)	9	11	7	5	9	6	10	7	11	9
Personal calls and video calls (e.g. Skype, Viber, FaceTime)	7	8	6	5	6	6	11	5	6	8
Down- and uploading files, photos and videos	8	10	5	5	12	5	13	9	6	7
Streaming video services e.g. Netflix, Disney+	9	9	8	7	15	7	12	9	8	10
Playing online realtime video games like world of warcraft, league of legends	4	4	4	3	7	3	5	5	5	3
Doing work from home including remote access and storage of documents, video-conferencing with for example Zoom or Teams	6	6	4	5	8	6	8	5	4	6
Virtual reality-based applications such as virtual installation guides of technical products or a virtual guide through a tourist destination	5	6	3	2	6	3	4	5	4	6
Security systems (such as Ring Door bell, etc.) with video hooked up to the Internet	6	7	5	4	8	3	6	7	7	5
Connected home devices such as smart speakers (e.g Alexa, Google Nest, etc)	7	7	4	4	11	8	7	7	6	7
Connected health monitoring devices (e.g FitBit, Whoop, etc) and/or remote healthcare video conferencing appointments (e.g Web Doctor, etc)	5	5	4	3	9	4	5	6	4	6

Those in sample 4 appear to be showing increasing appetite for service usage over the coming 12 months, while those in samples 3 & 5 appear to be showing much less of an appetite for increased usage.

Q.26 Looking at the next 12 months, do you expect to use, or start to use, the following internet based services more, less, or use the same amount?

Agreement / Disagreement with Broadband Usage Statements

Base: All Decision Makers with fixed internet/BB 2,394



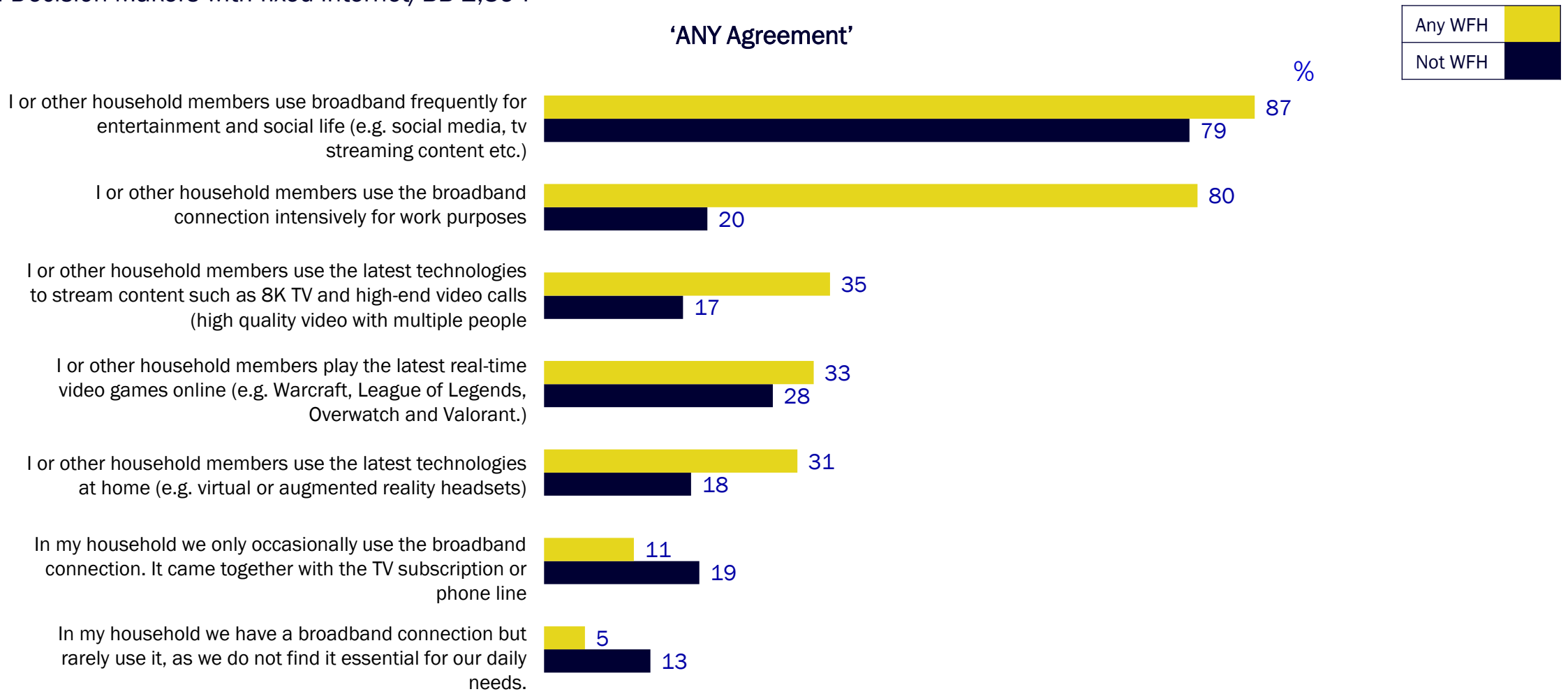
	I or other household members use broadband frequently for entertainment and social life (e.g. social media, tv streaming content etc.)	I or other household members use the broadband connection intensively for work purposes	I or other household members play the latest real-time video games online (e.g. Warcraft, League of Legends, Overwatch and Valorant.)	I or other household members use the latest technologies to stream content such as 8K TV and high-end video calls (high quality video with multiple people)) This is different to streaming regular tv content or a face-time call	I or other household members use the latest technologies at home (e.g. virtual or augmented reality headsets)	In my household we only occasionally use the broadband connection. It came together with the TV subscription or phone line	In my household we have a broadband connection but rarely use it, as we do not find it essential for our daily needs.
NET (Agree)	76	38	29	26	26	18	15
NET (Disagree)	13	52	62	61	61	73	77
Mean	4.03	2.66	2.27	2.26	2.23	1.96	1.83

BB is clearly perceived as an essential service for the vast majority of respondents, however this does not manifest in the form of work, but rather it appears to be mostly used for entertainment and social life.

Q.27 Please look at the following statements regarding how much you use broadband services at home and what you use it for. Could you indicate the degree to which you can identify your household's Internet use with each statement?

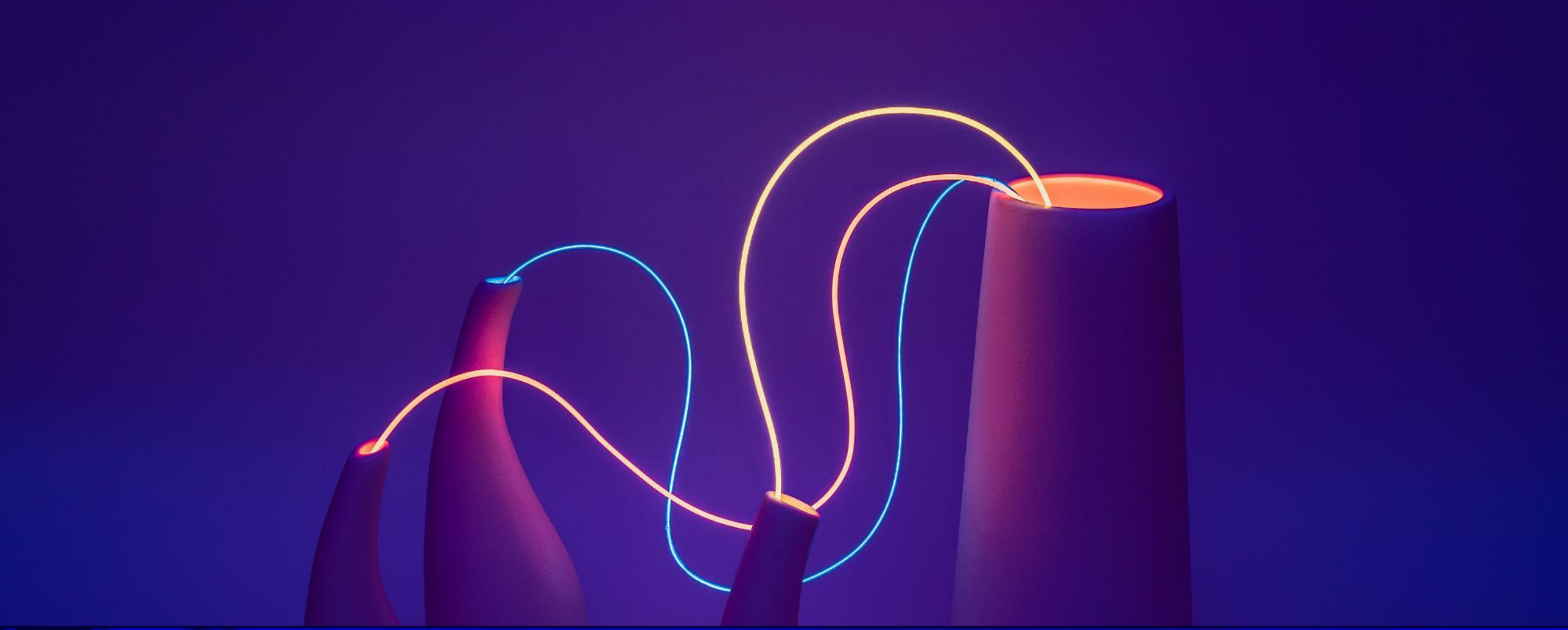
Agreement / Disagreement with Broadband Usage Statements x Working From Home

Base: All Decision Makers with fixed internet/BB 2,394



Those working from home are more likely to be using more advanced tech in the home and show higher levels of reliance / usage of broadband.

Q.27 Please look at the following statements regarding how much you use broadband services at home and what you use it for. Could you indicate the degree to which you can identify your household's Internet use with each statement?

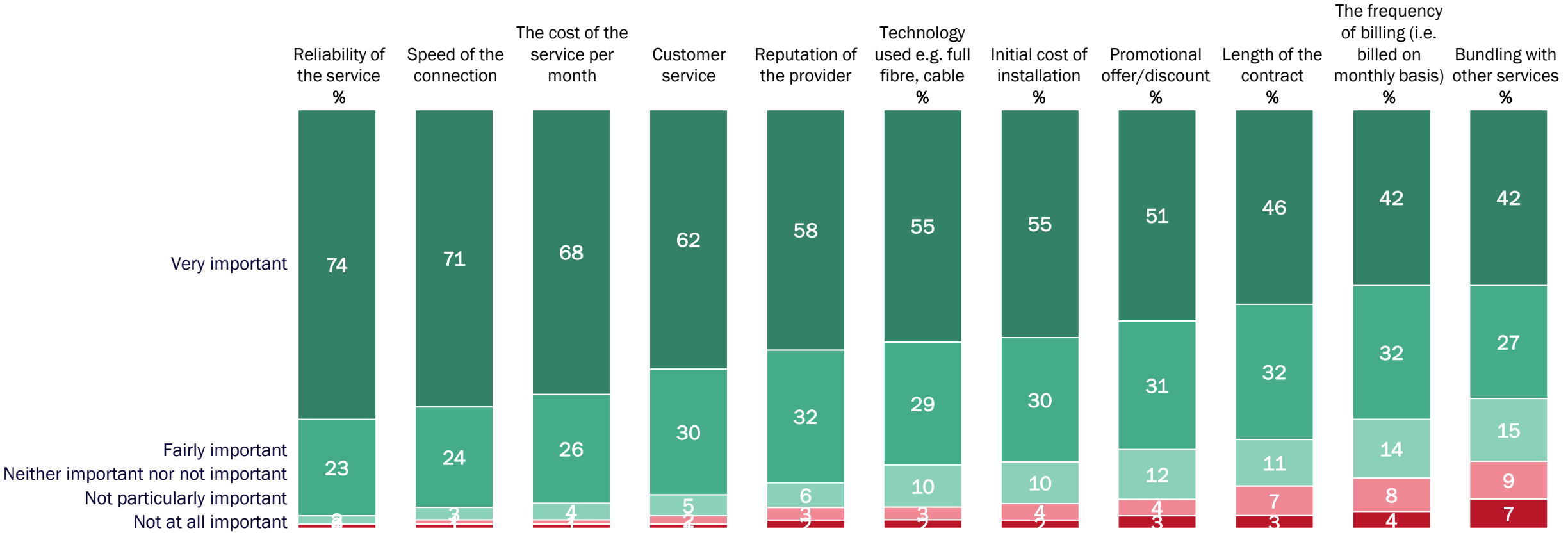


Broadband Service

B&A

Important Factors in Choosing Broadband Service

Base: All Decision Makers with fixed internet/BB 2,394



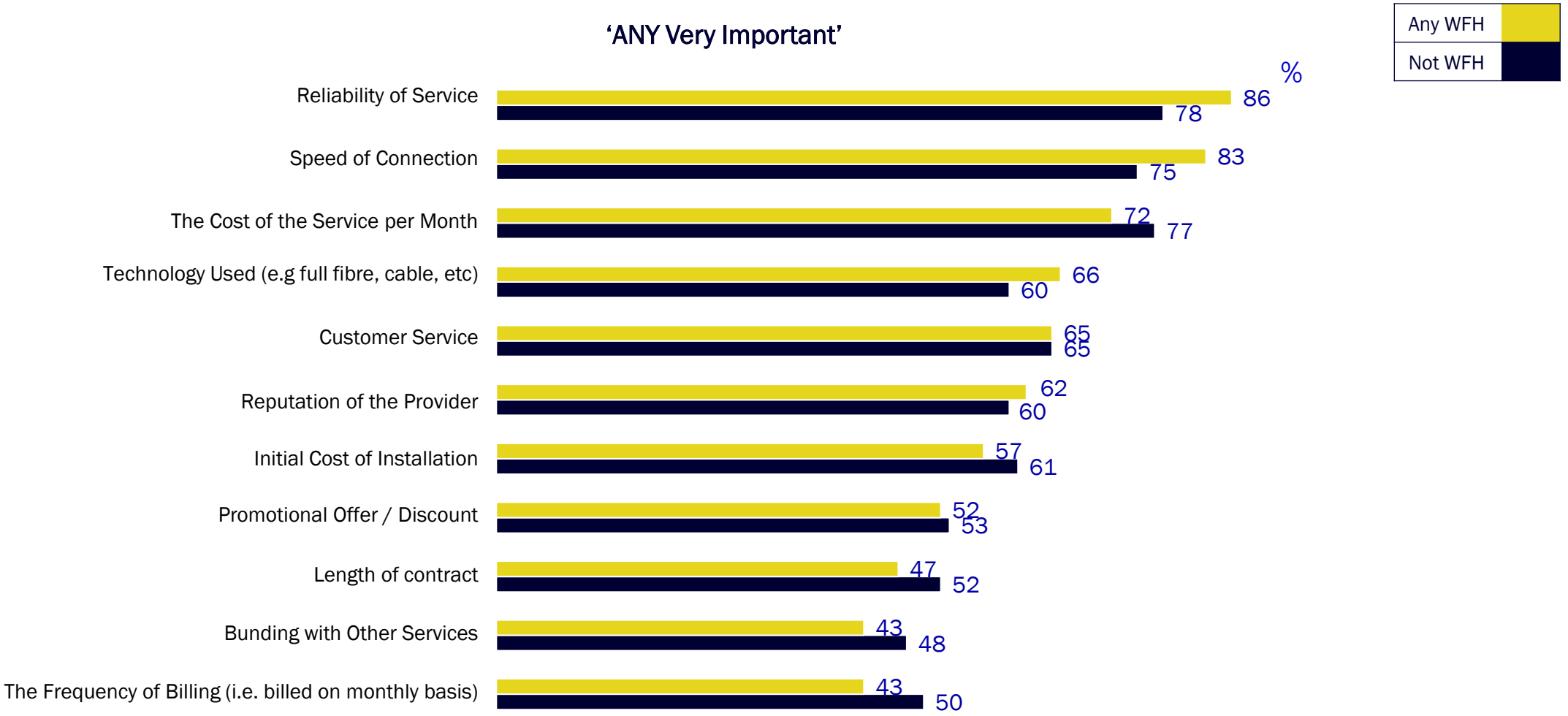
	Reliability of the service %	Speed of the connection	The cost of the service per month	Customer service	Reputation of the provider	Technology used e.g. full fibre, cable %	Initial cost of installation %	Promotional offer/discount %	Length of the contract %	The frequency of billing (i.e. billed on monthly basis) %	Bundling with other services %
NET (Important)	97	96	94	92	90	84	84	82	78	74	69
NET (Not Important)	1	2	2	3	5	6	6	6	10	12	17
Mean	4.69	4.64	4.60	4.49	4.41	4.32	4.31	4.24	4.11	4.01	3.87

Although all metrics are deemed important by the vast majority of respondents, the most important factors in selecting broadband services are reliability, speed, cost and customer service. Bundling and frequency of billing are less considered when choosing.

Q.28 How important, or not, were the following factors when you selected your current home broadband service?

Very Important Factors for Choosing Broadband Service vs Working from Home

Base: All Decision Makers with fixed internet/BB 2,394

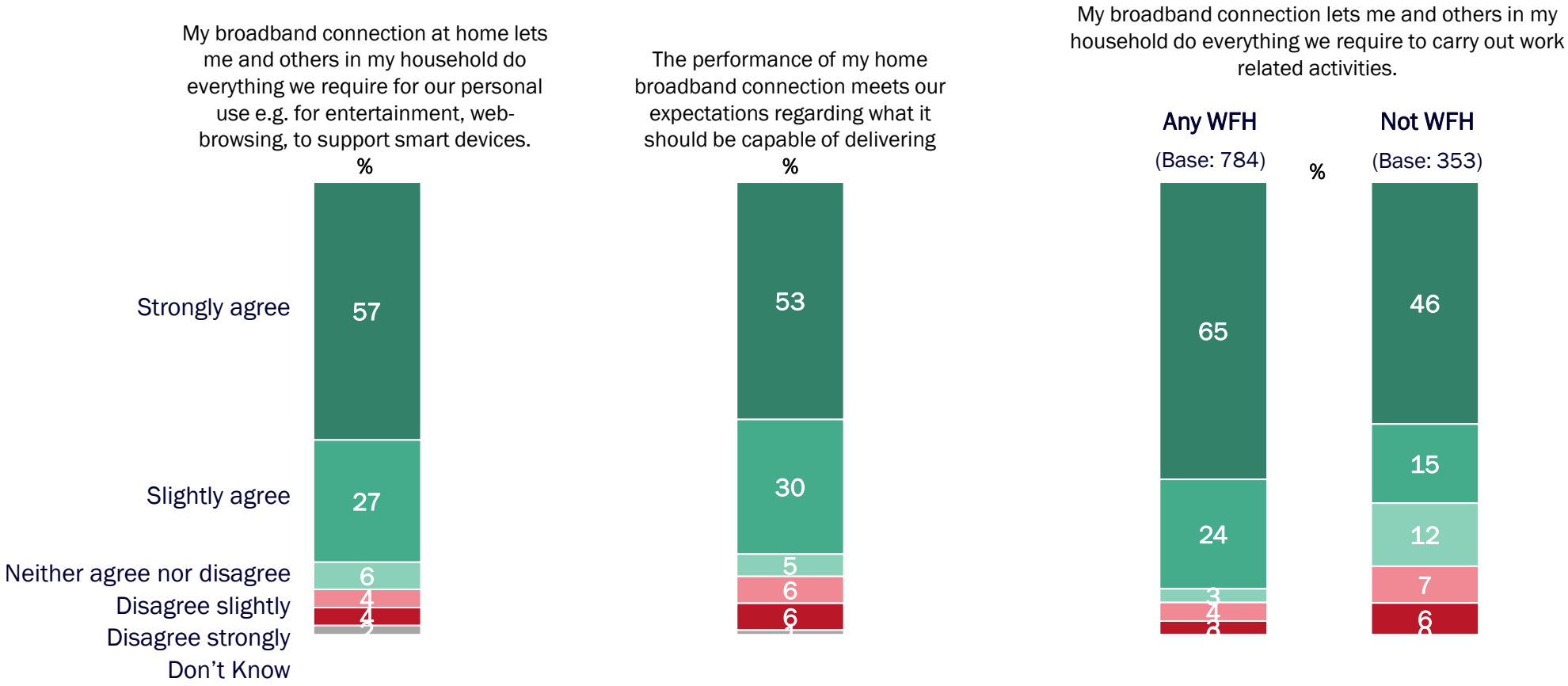


Those working from home are more likely to view reliability and speed as they key factors in selecting broadband, while cost is the main concern of those not working from home.

Q.28 How important, or not, were the following factors when you selected your current home broadband service?

Agreement / Disagreement with Broadband Performance-based Statements

Base: All Decision Makers with fixed internet/BB 2,394



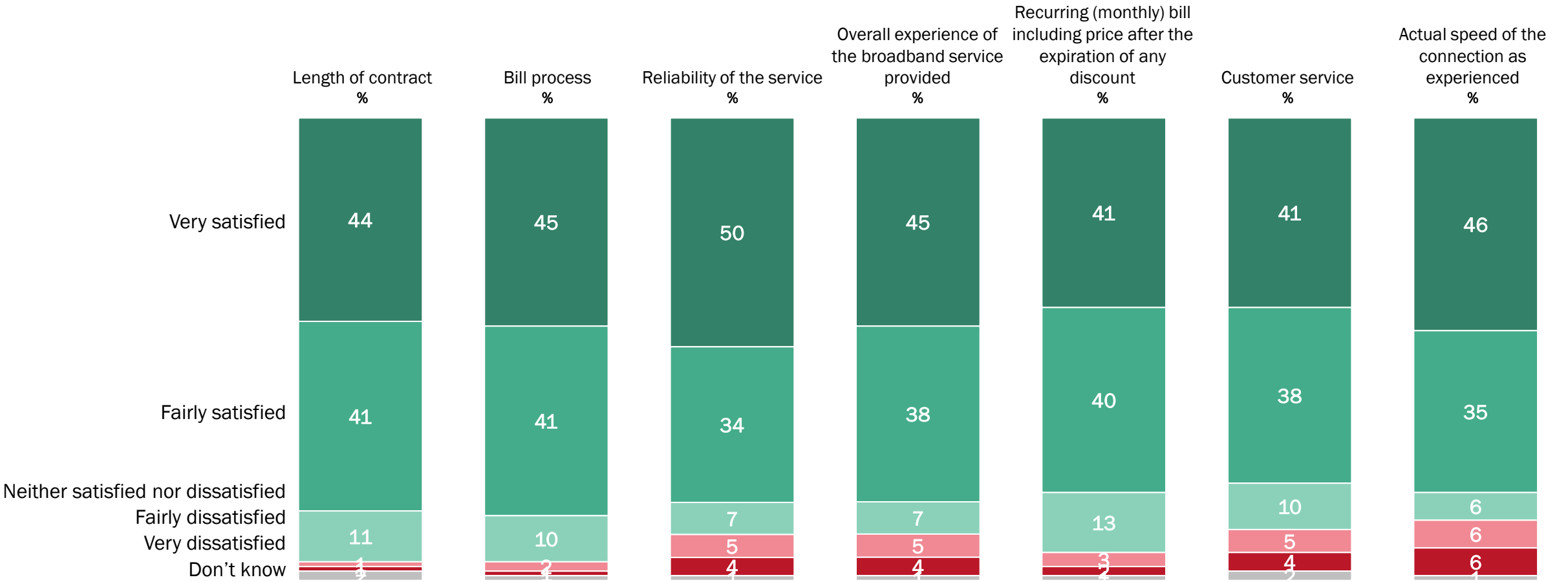
NET (Agree)	84		83		89	61
NET (Disagree)	8		12		8	13
Mean	4.31		4.18		4.33	4.01

There is strong agreement across the board in regard to BB performance, however there is over 1 in 10 noting that their BB connection does not meet expectations and does not allow all in the household to do everything required to carry out work related activities (however, this is driven by those who do not work from home).

Q.29 Please indicate to what extent you can identify with the following statements:

Satisfaction with Broadband Service

Base: All Decision Makers with fixed internet/BB 2,394



	Length of contract %	Bill process %	Reliability of the service %	Overall experience of the broadband service provided %	Recurring (monthly) bill including price after the expiration of any discount %	Customer service %	Actual speed of the connection as experienced %
NET (Satisfied)	85	86	84	83	81	79	81
NET (Dissatisfied)	2	3	9	8	5	9	12
Mean	4.29	4.29	4.22	4.17	4.16	4.10	4.10

There is strong satisfaction across the board, though 1 in 10 note dissatisfaction with customer service and the actual speed of their broadband connection.

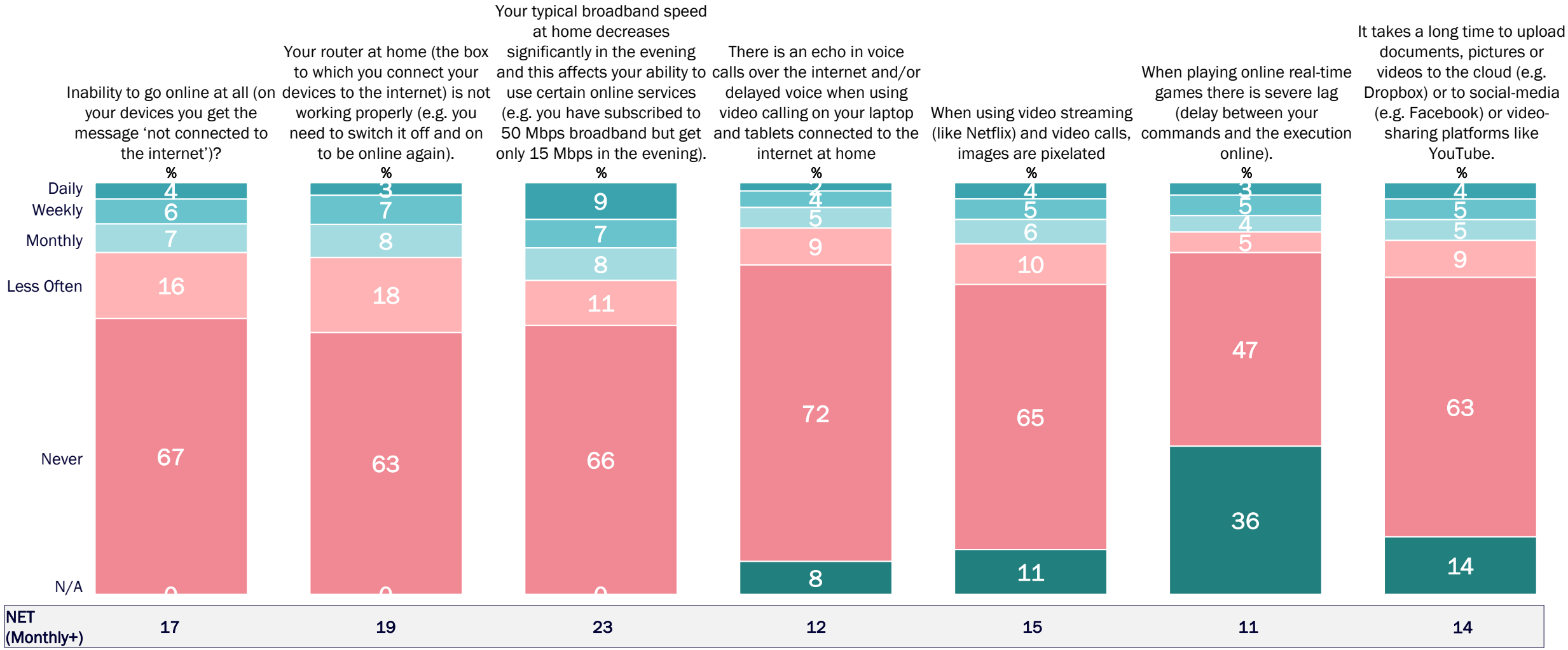
Q.30 Using the following scale, how satisfied, or dissatisfied, are you with each the following aspects of the service you receive from your home broadband supplier?

Issues experienced

B&A

Rate of Experiencing the Following Problems with Broadband Service

Base: All Decision Makers with fixed internet/BB 2,394



With the exception of decrease in BB speed in the evenings (1 in 4 experiencing on a monthly basis or more frequently), incidence of other problems are relatively rare. All other issues are cited by less than 1 in 5 respondents. It is interesting to note that, although there are few variances when focusing on everyday issues, when focusing on never having issues, those working from home and those with more people in their household show higher levels of issues.

Q.31 To what extent, if at all, do you experience the following problems with your broadband service at home?

Daily Experiencing the Following Problems with Broadband Service x Demos

Base: All Decision Makers with fixed internet/BB 2,394

Everyday Issues	Total	Sample					Age				WFH	
		Sample 1	Sample 2	Sample 3	Sample 4	Sample 5	18-34	35-49	50-64	65+	Yes	No
Base	*2394*	*532*	*517*	*495*	*441*	*409*	*438*	*861*	*658*	*437*	*784*	*353*
	%	%	%	%	%	%	%	%	%	%	%	%
Inability to go online at all (on your devices you get the message 'not connected to the internet')?	4	3	4	4	7	6	3	3	5	5	2	3
Your router at home (the box to which you connect your devices to the internet) is not working properly (e.g. you need to switch it off and on to be online again).	3	2	5	3	5	5	3	3	2	4	3	3
Your typical broadband speed at home decreases significantly in the evening and this affects your ability to use certain online services (e.g. you have subscribed to 50 Mbps broadband but get only 15 Mbps in the evening).	9	9	8	6	12	11	8	9	11	5	8	10
There is an echo in voice calls over the internet and/or delayed voice when using video calling on your laptop and tablets connected to the internet at home	2	2	3	2	4	5	2	3	2	3	3	3
When using video streaming (like Netflix) and video calls, images are pixelated	4	3	5	2	8	5	4	5	3	3	2	3
When playing online real-time games there is severe lag (delay between your commands and the execution online).	3	2	4	2	5	4	5	3	2	1	1	4
It takes a long time to upload documents, pictures or videos to the cloud (e.g. Dropbox) or to social-media (e.g. Facebook) or video-sharing platforms like YouTube.	4	4	4	3	7	6	4	5	5	3	3	4

The more rural samples note daily issues at a higher rate, however this is more notable in Sample 4.

Q.31 To what extent, if at all, do you experience the following problems with your broadband service at home?

Monthly+ Experiencing the Following Problems with Broadband Service x Demos

Base: All Decision Makers with fixed internet/BB 2,394

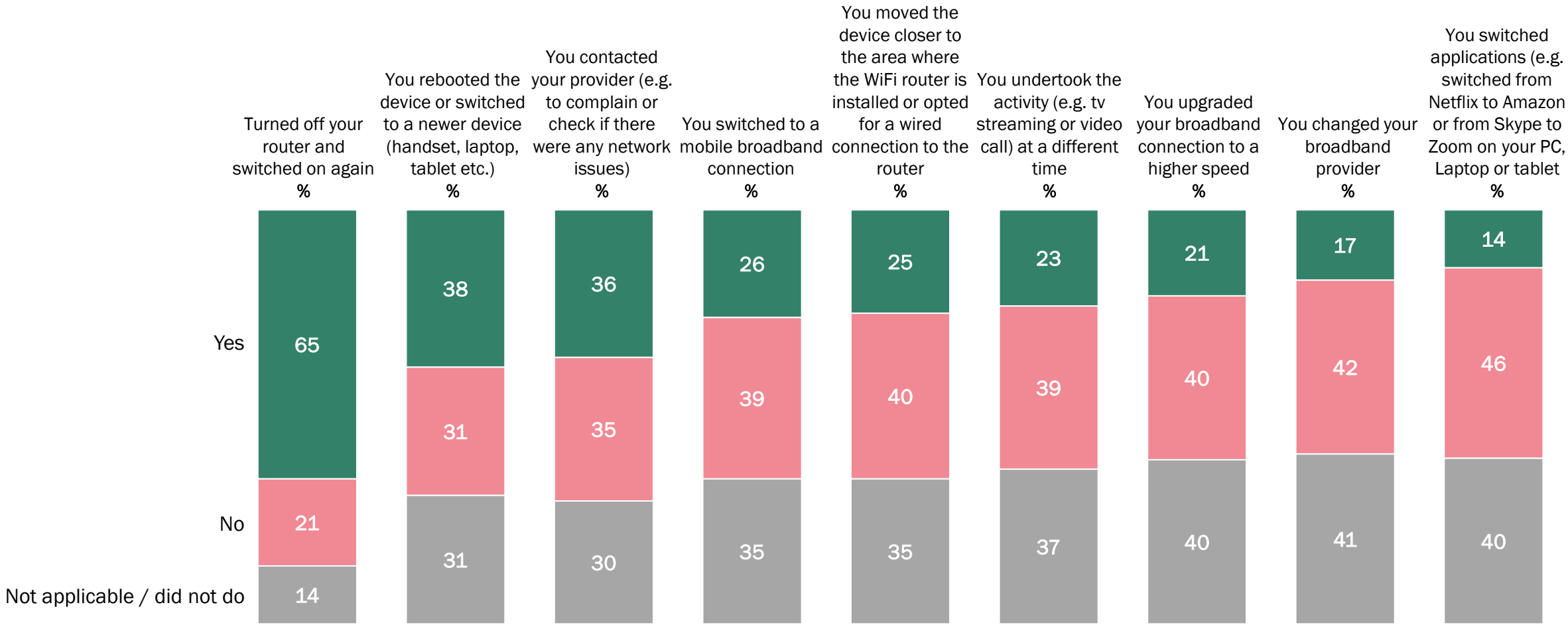
Monthly +	Total	Sample					Age				WFH	
		Sample 1	Sample 2	Sample 3	Sample 4	Sample 5	18-34	35-49	50-64	65+	Any WFH	No WFH
UNWTD	2394	532	517	495	441	409	438	861	658	437	784	353
	%	%	%	%	%	%	%	%	%	%	%	%
Inability to go online at all (on your devices you get the message 'not connected to the internet')?	17	15	17	16	27	23	17	17	18	17	16	9
Your router at home (the box to which you connect your devices to the internet) is not working properly (e.g. you need to switch it off and on to be online again).	19	18	19	14	24	27	18	21	17	17	20	9
Your typical broadband speed at home decreases significantly in the evening and this affects your ability to use certain online services (e.g. you have subscribed to 50 Mbps broadband but get only 15 Mbps in the evening).	23	22	23	18	31	32	24	23	27	18	26	19
There is an echo in voice calls over the internet and/or delayed voice when using video calling on your laptop and tablets connected to the internet at home	12	11	12	10	17	13	12	13	11	11	12	8
When using video streaming (like Netflix) and video calls, images are pixelated	15	15	16	11	23	14	17	18	14	10	17	9
When playing online real-time games there is severe lag (delay between your commands and the execution online).	11	11	13	8	14	10	19	13	9	5	11	8
It takes a long time to upload documents, pictures or videos to the cloud (e.g. Dropbox) or to social-media (e.g. Facebook) or video-sharing platforms like YouTube.	14	13	9	12	24	20	18	15	15	7	17	7

The more rural samples note monthly issues at a higher rate. Males are also more likely to note issues.

Q.31 To what extent, if at all, do you experience the following problems with your broadband service at home?

Rate of Improvement of issues following the Various Actions

Base: All Decision Makers with problems with home BB 1351



The most common practice used to solve a connectivity issue is turning off the router and turning back on again - this is also the most effective, with almost 2 in 3 noting an improvement. Following this, there is a substantial drop off in terms of usage and effectiveness of other solutions. It should be noted here that those living in sample areas 4 & 5 are much more likely to note that these actions did not improve the problems experienced.

Q.32 Did you find that those problems improved if -

Migration Experience to Full Fibre

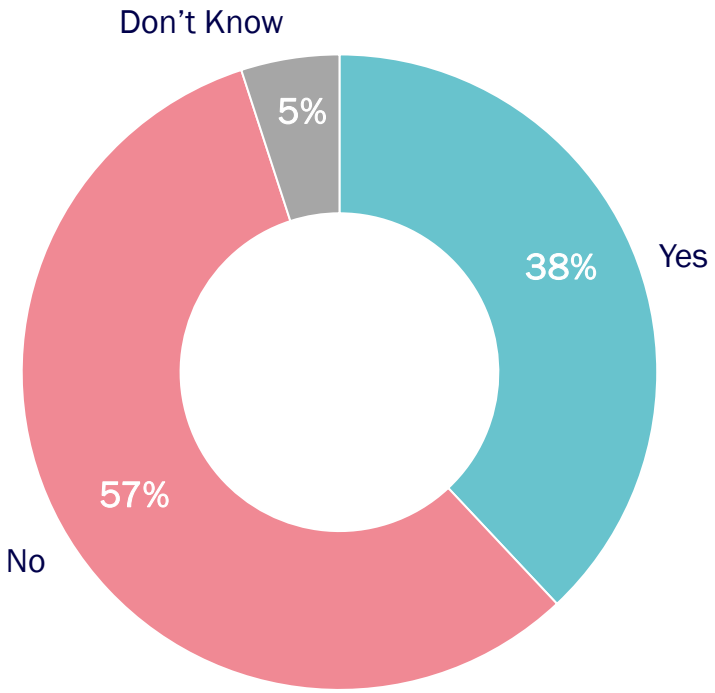
B&A

Incidence of Upgrading Broadband Service

Base: All Decision Makers with fixed internet/BB 2,394

Q.33) Upgraded to higher download speed in last 3 years?

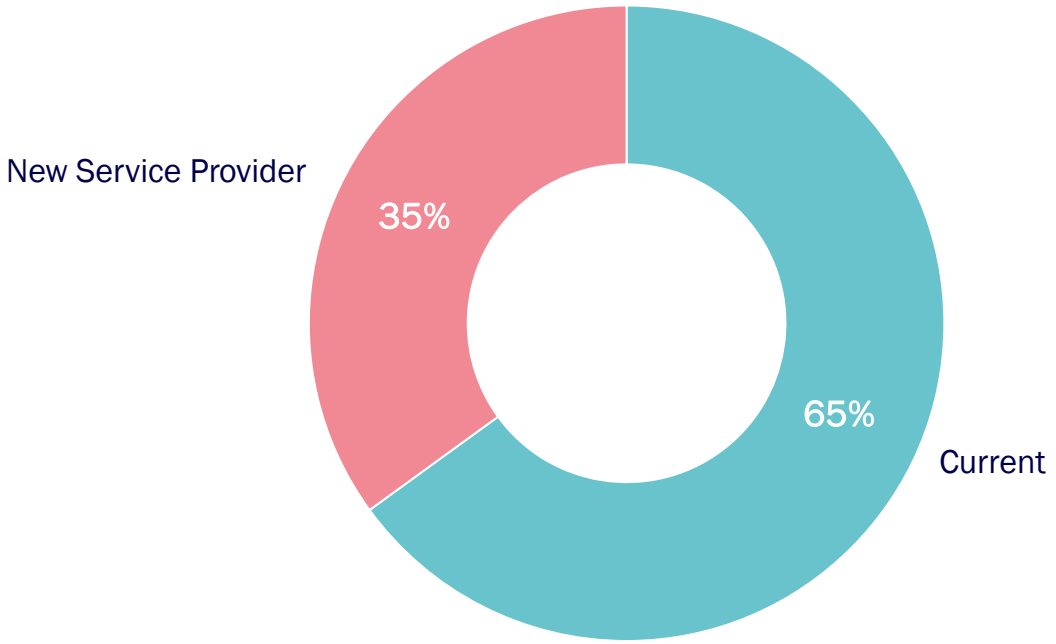
%



Q.34) Kept Current Provider or Changed?

Base: All upgraded to higher speed 953

%



2 in 5 claim to have upgraded in the last 3 years, with 2 in 3 noting they stayed with their current provider.

Q.33 Have you upgraded your broadband service to a higher download speed within the last 3 years?
Q.34 Did you upgrade it with your current broadband service provider or did you change to a new broadband service provider?

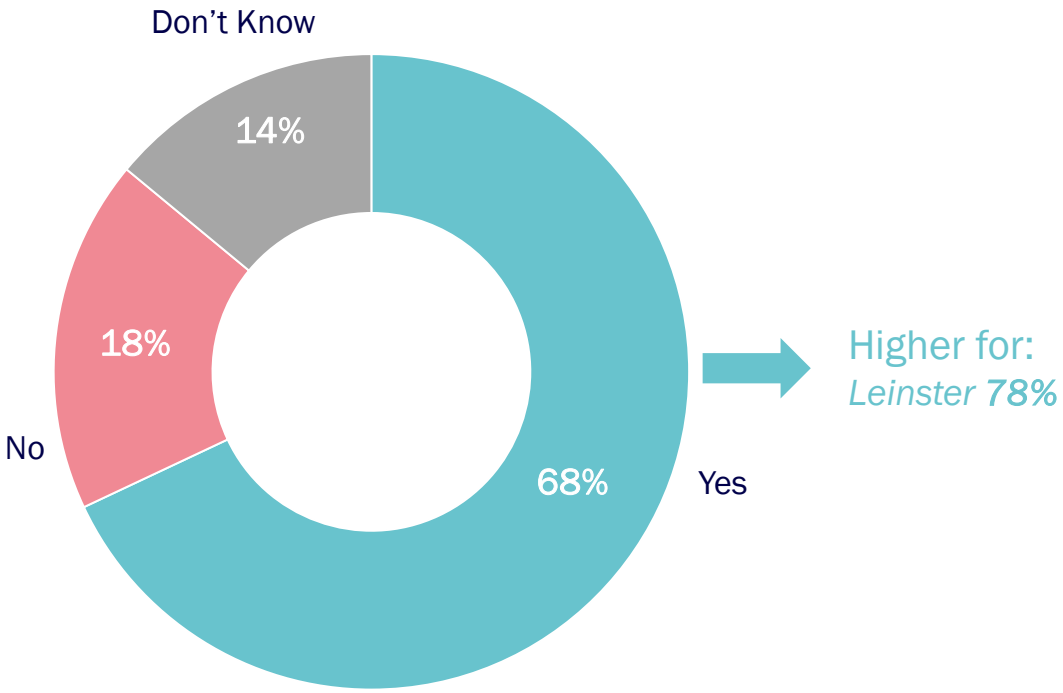
Notification of Full Fibre Broadband Network Availability

Base: All with full Fibre n=343*

Q.35) Notified about full fibre being available

Base: All with full fibre technology 343

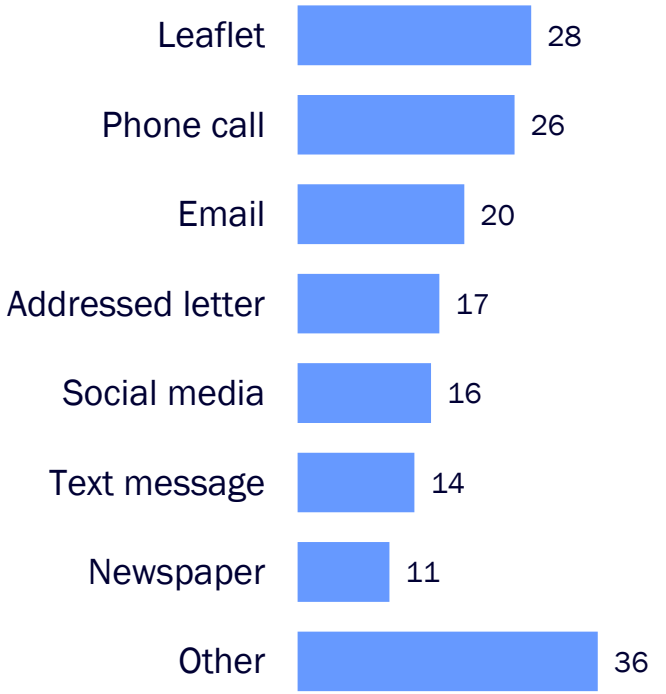
%



Q.35a) Method of being Informed

Base: All notified about full fibre being available 225

%



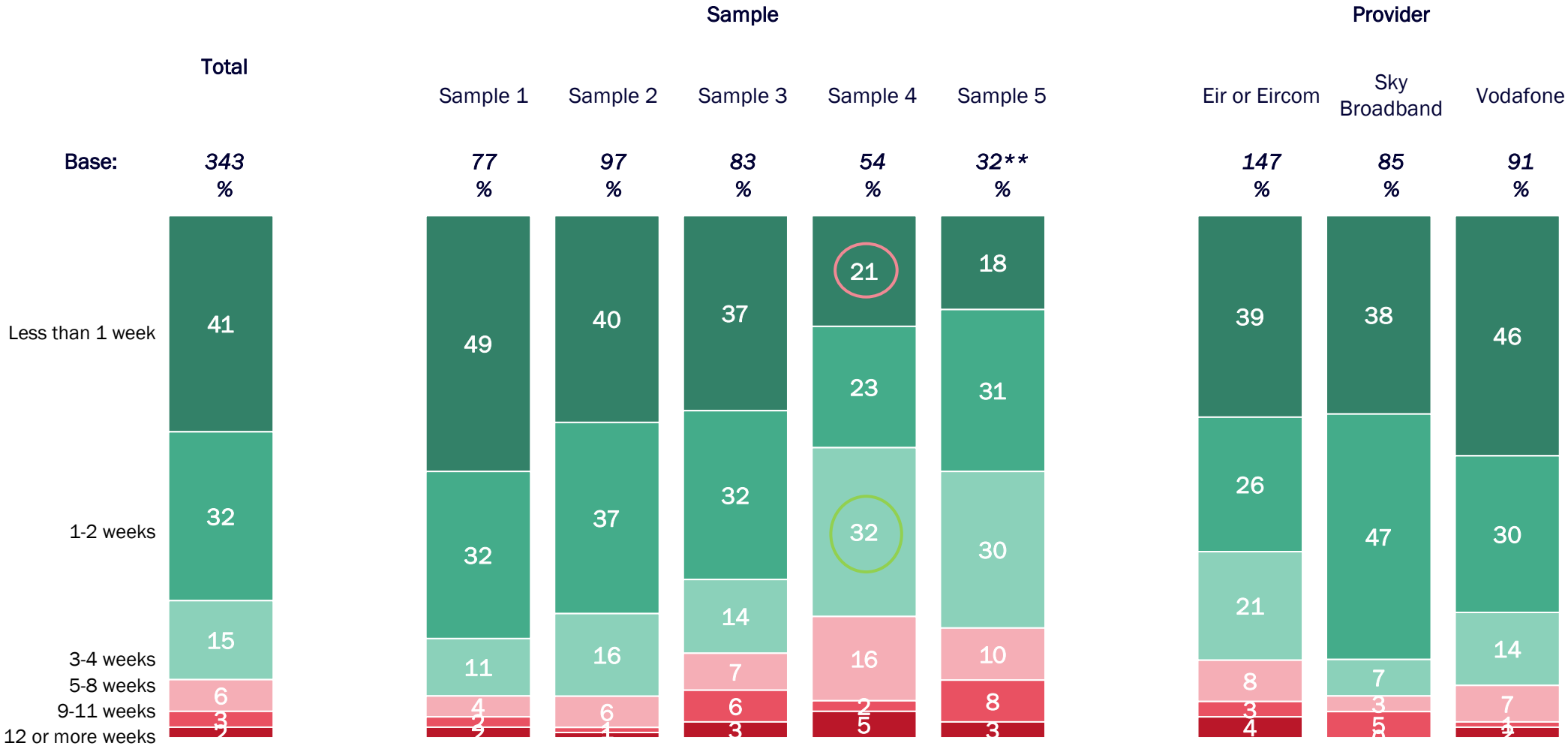
2 in 3 claim to have been notified of full fibre broadband in their area (much higher in Leinster). The methods of communicating this vary with leaflets, phone calls, and to a lesser extent email, being utilized most.

*Given the challenge for respondents in terms of understanding fibre/terms/what service they have, after we asked if they had full fibre, at the analysis stage we further filtered based on speed (250+ mpbs) and service provider.

Q.35 Were you notified that a full fibre network was available in your area or home before you got it installed?
Q.35a How were you informed? -

Length of Time from Ordering Fibre BB to being Ready for Use

Base: All with Full Fibre n=343*



Over 2 in 5 with fibre had this ready to use within one week from ordering. However, this varies significantly across sample areas, with only 18% of those in Sample Area 5 having fibre ready to use within one week. Sample areas 4 & 5 showing lengthier wait times.

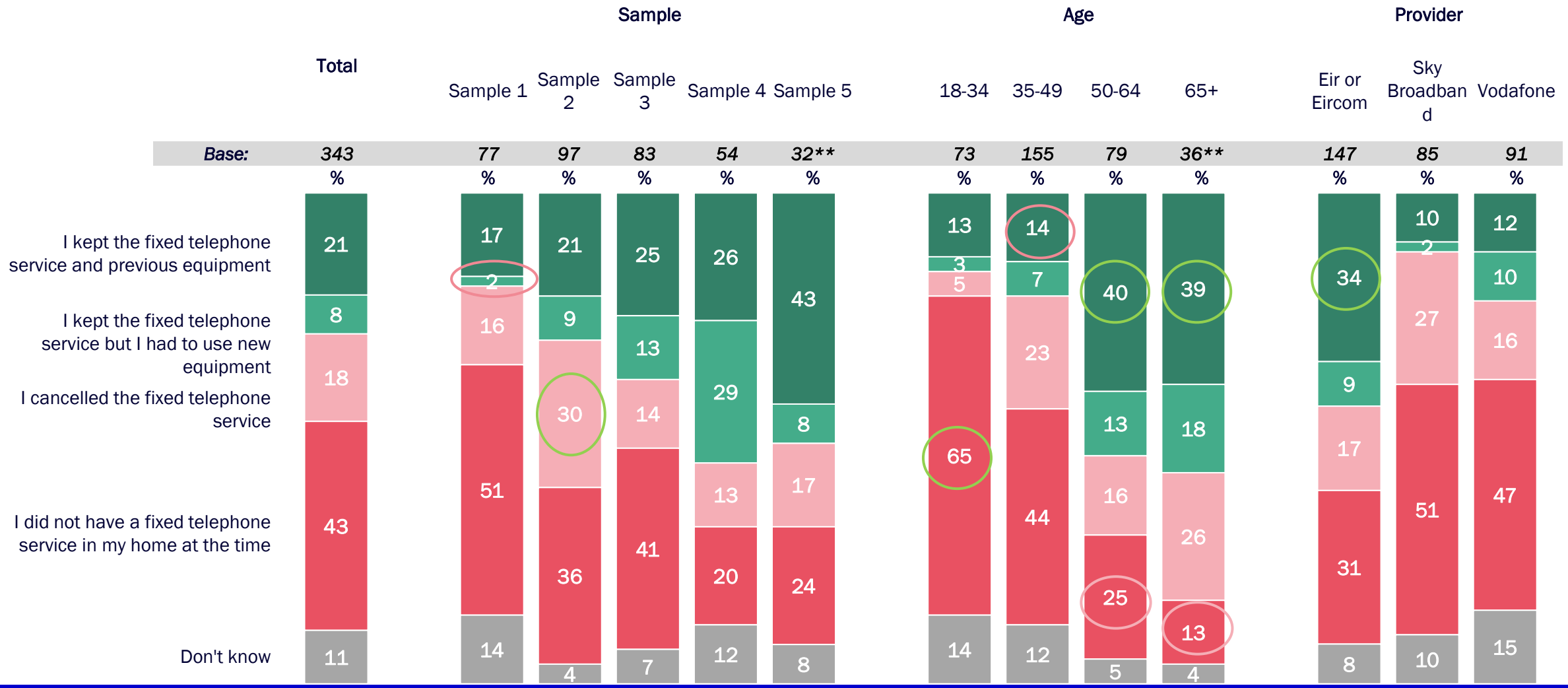
*Given the challenge for respondents in terms of understanding fibre/terms/what service they have, after we asked if they had full fibre, at the analysis stage we further filtered based on speed (250+ mpbs) and service provider.

**Caution small base size

Q.36 How long did it take from ordering the connection to the fibre broadband being ready for use?

Incidence of Retaining Fixed Telephone Service after getting fibre

Base: All with Full Fibre n=343*



3 in 5 either cancelled or did not have a telephone service to begin with. However, among those in more rural sample (particularly Sample 4 & 5) and those over 50 show much more of an appetite to keep their telephone service.

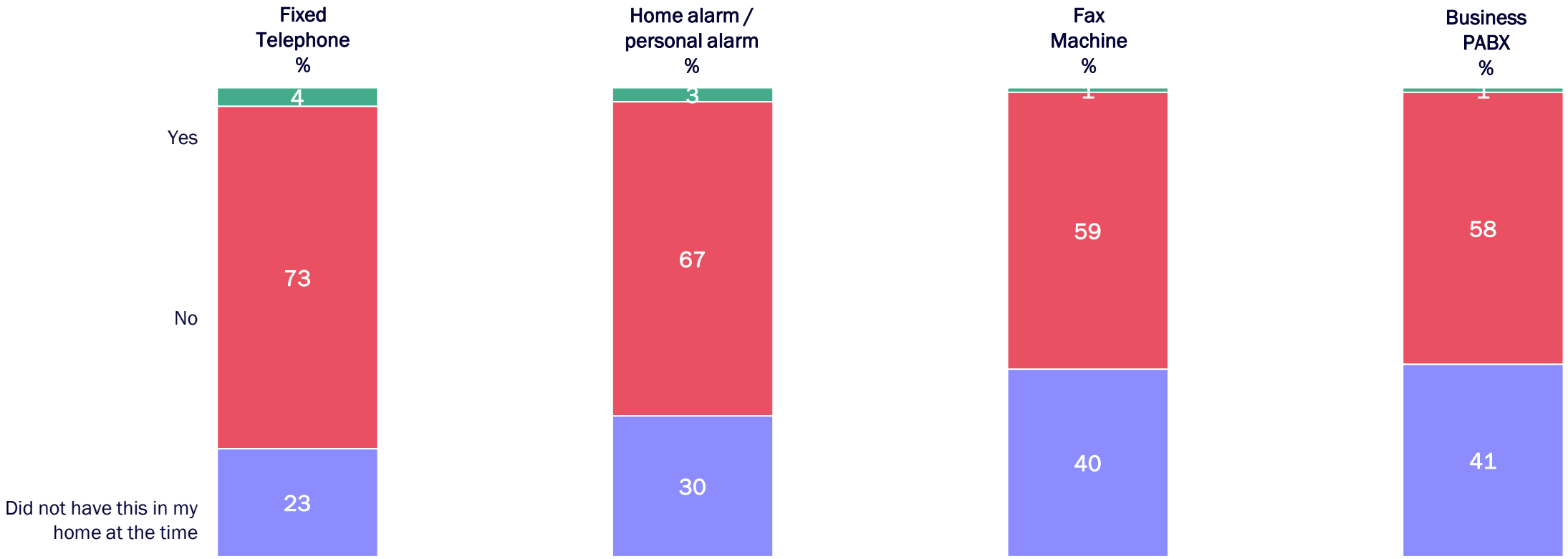
*Given the challenge for respondents in terms of understanding fibre/terms/what service they have, after we asked if they had full fibre, at the analysis stage we further filtered based on speed (250+ mpbs) and service provider.

**Caution small base size

? Q.37 Did you retain your existing (previous) fixed telephone service and equipment?

Any Issues with Home Equipment after moving to full Fibre

Base: All with Full Fibre n=343*



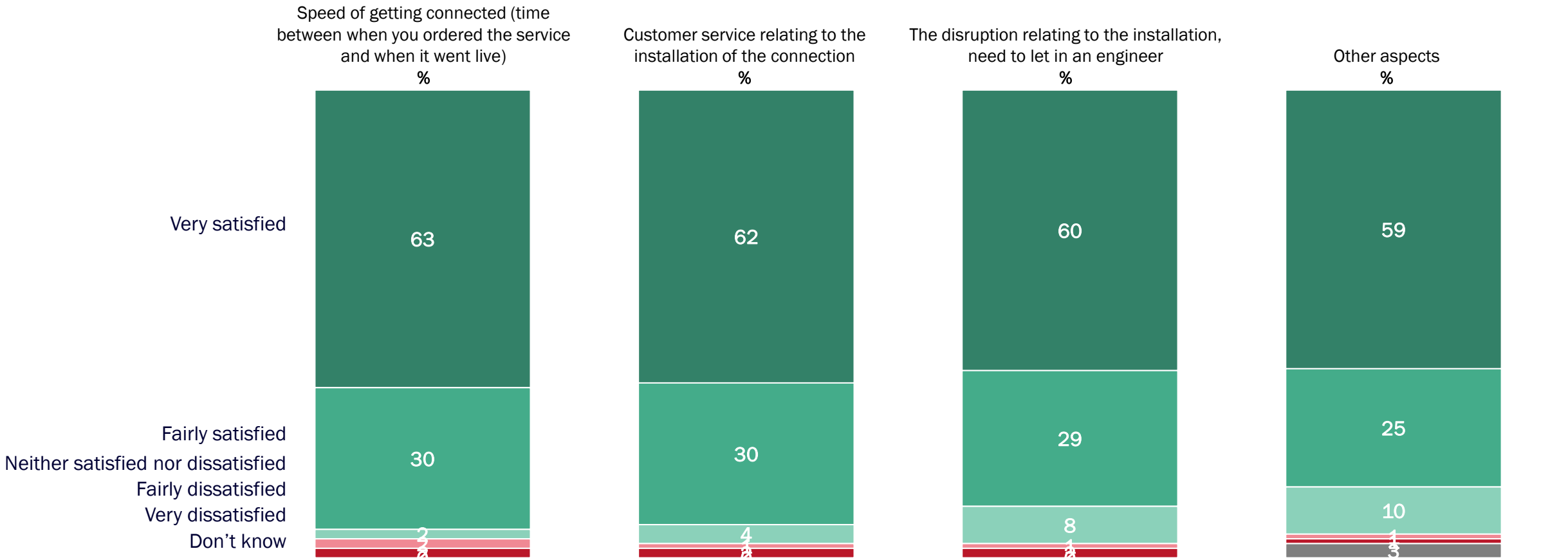
The vast majority did not have any issues in the move to fibre (or did not have the equipment prior to migration). Less usage of a fax machine or a business PABX is apparent.

*Given the challenge for respondents in terms of understanding fibre/terms/what service they have, after we asked if they had full fibre, at the analysis stage we further filtered based on speed (250+ mpbs) and service provider.

Q.38 Did you have any issues regarding equipment in your home that no longer worked and had to be discontinued or replaced when you moved to fibre(e.g. home alarm, fax machine, Business PABX.).

Satisfaction / Dissatisfaction with Process of Connecting to Full Fibre

Base: All with Full Fibre n=343*



	Speed of getting connected (time between when you ordered the service and when it went live) %	Customer service relating to the installation of the connection %	The disruption relating to the installation, need to let in an engineer %	Other aspects %
NET (Agree)	93	93	89	84
NET (Disagree)	4	3	3	2
Mean	4.50	4.50	4.45	4.45

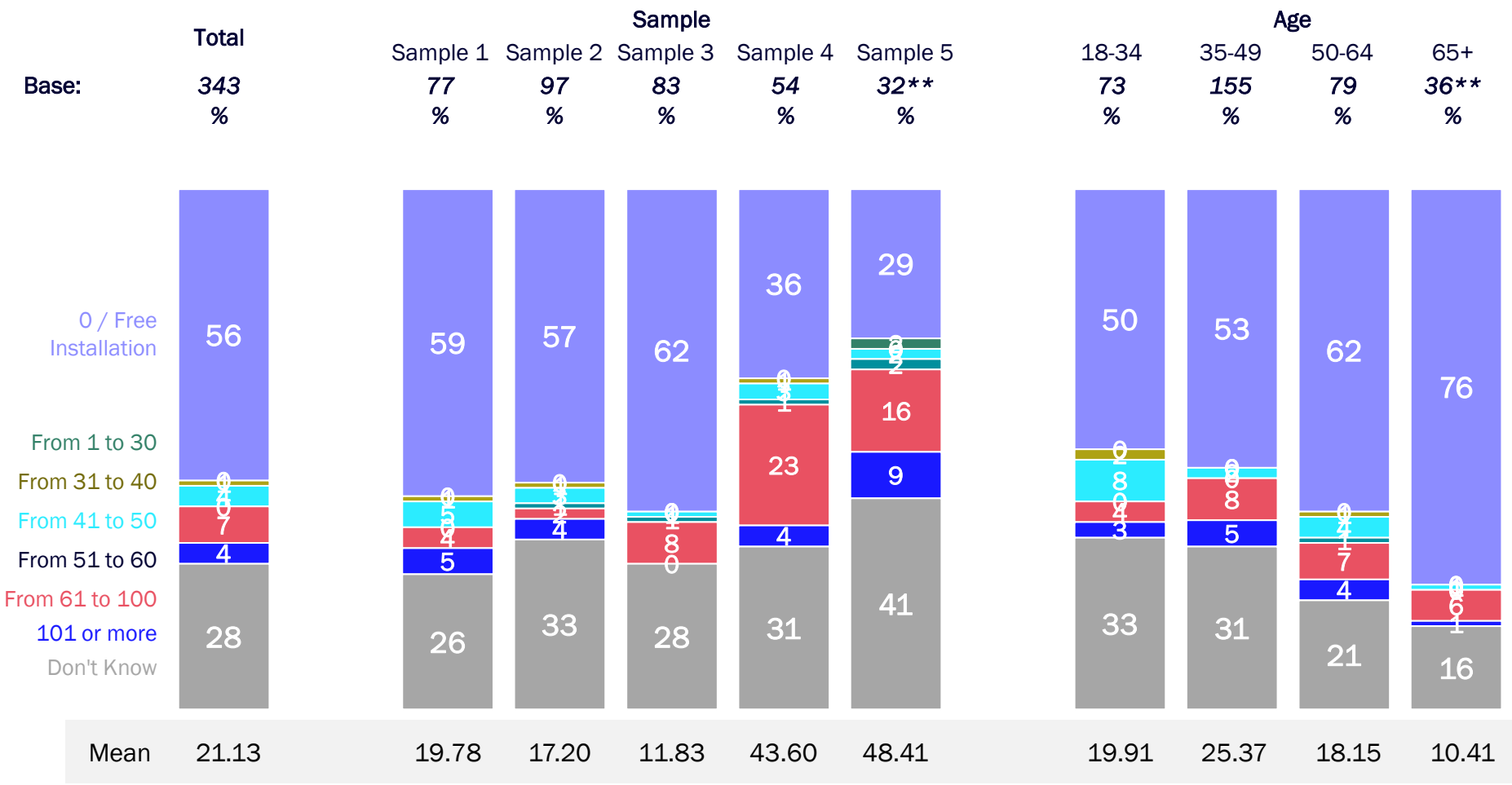
There is very high satisfaction across the board, with over 4 in 5 citing satisfaction with all metrics.

*Given the challenge for respondents in terms of understanding fibre/terms/what service they have, after we asked if they had full fibre, at the analysis stage we further filtered based on speed (250+ mpbs) and service provider.

Q.39 To what extent were you satisfied, or dissatisfied, with the process of getting connected to fibre? Please answer regarding

Installation Cost of Full Fibre

Base: All with Full Fibre n=343*



Over half did not pay for the installation of fibre in their home, which is higher among those in sample areas 1, 2 & 3. This is reinforced by the much higher average cost among those in sample areas 4 & 5.

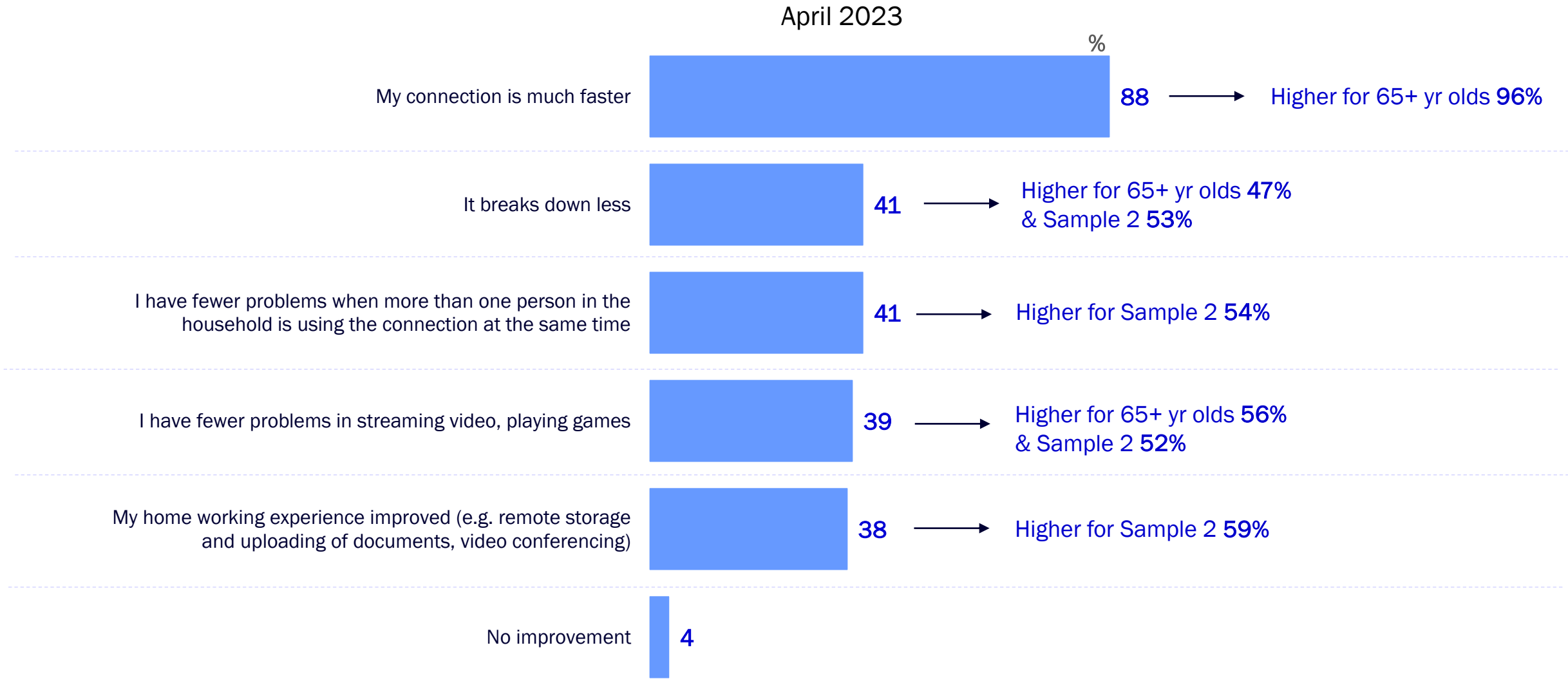
Q.40 What was the installation cost (one-time charge) of bringing fibre into the house?

*Given the challenge for respondents in terms of understanding fibre/terms/what service they have, after we asked if they had full fibre, at the analysis stage we further filtered based on speed (250+ mpbs) and service provider.

**Caution small base size

Key Improvements Associated with Moving to Full Fibre

Base: All with Full Fibre n=343*

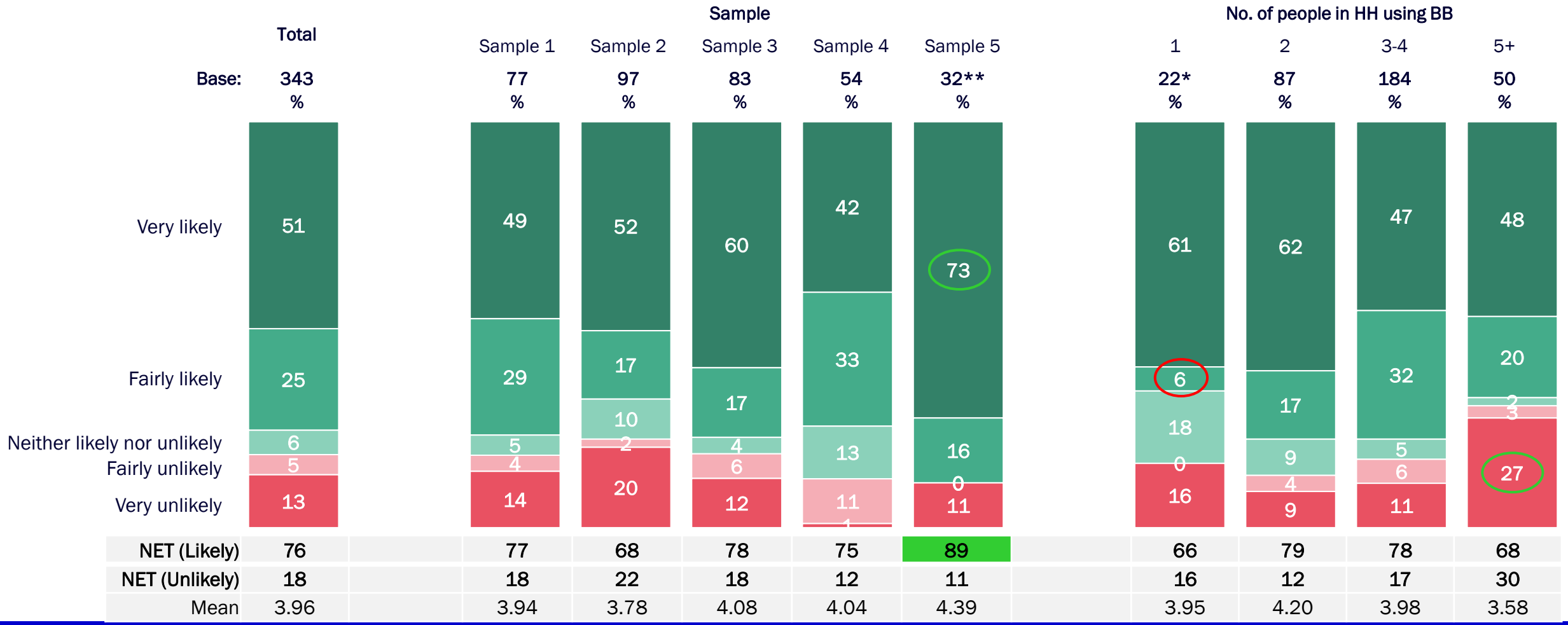


The key improvement relates to speedier connection (9 in 10), however there is a substantial drop in those citing speedier connection among those working from home.

Q.41 Which improvements did you notice in the quality of your broadband service since using a fibre broadband network?

Likelihood of Recommending Fibre Broadband x Sample Areas

Base: All with Full Fibre n=343*

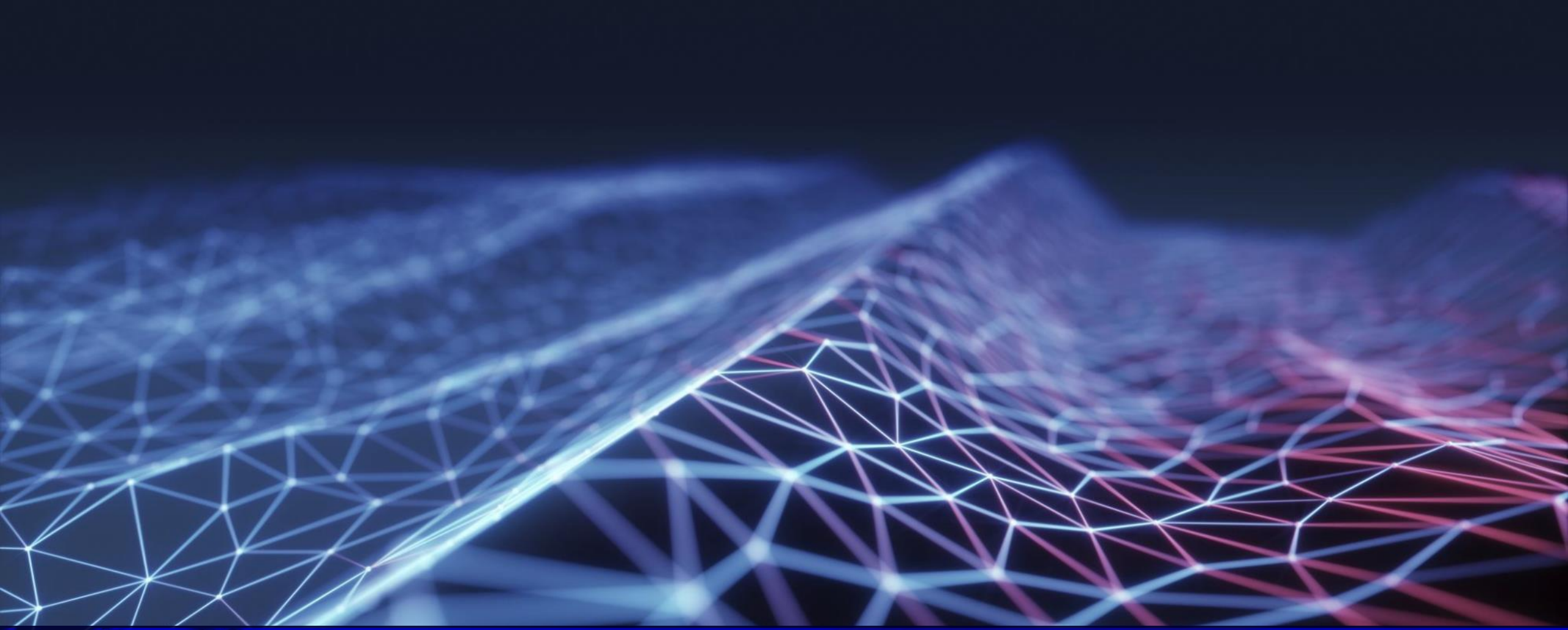


	Total	Sample 1	Sample 2	Sample 3	Sample 4	Sample 5	1	2	3-4	5+
Base:	343	77	97	83	54	32**	22*	87	184	50
	%	%	%	%	%	%	%	%	%	%
NET (Likely)	76	77	68	78	75	89	66	79	78	68
NET (Unlikely)	18	18	22	18	12	11	16	12	17	30
Mean	3.96	3.94	3.78	4.08	4.04	4.39	3.95	4.20	3.98	3.58

Those in Sample 5 are more likely to recommend, indicating that fibre has aided their connectivity issues seen throughout the research.

*Given the challenge for respondents in terms of understanding fibre/terms/what service they have, after we asked if they had full fibre, at the analysis stage we further filtered based on speed (250+ mpbs) and service provider.

Q.42 How likely, or unlikely, would you be to recommend upgrading to a Fibre broadband service to a friend or family member?

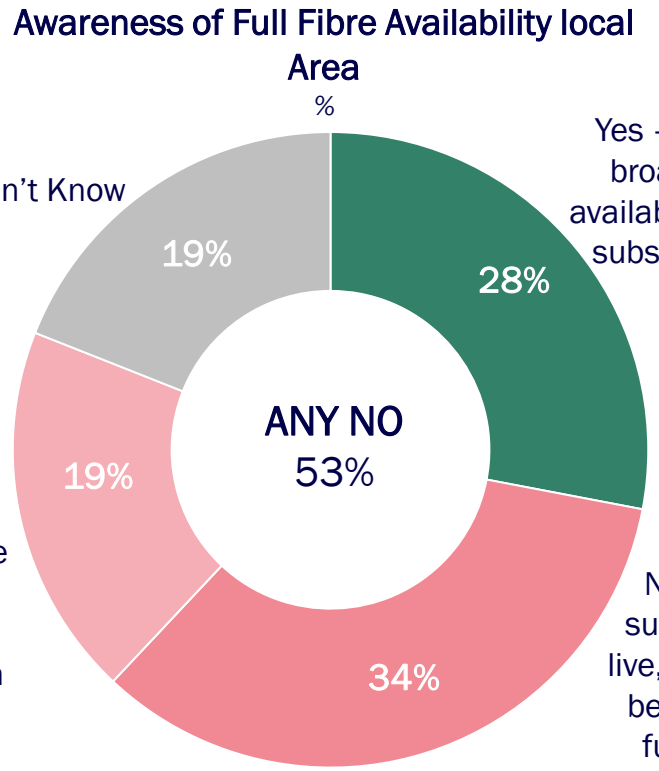


Appetite for Full Fibre

B&A

Awareness of Full Fibre Availability local Area

Base: All claiming not to have full fibre n=618*



	Total	Sample				
		Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
Base	*618*	*86*	*123*	*120*	*147*	*142*
	%	%	%	%	%	%
Yes – a full fibre network for broadband connections is available in my area and I could subscribe to it but I have not done so	28	31	36	20	25	22
No, it is not yet possible to subscribe to full fibre where I live, but I understand that it will be possible to subscribe to a full fibre connection soon.	34	33	31	38	33	44
No, there is no full fibre network for broadband available to my home and there are no plans that I am aware of to build fibre to my home in the near future.	19	17	8	20	27	28
Don't know	19	19	26	22	15	6
NET (No)	53	50	38	58	60	71

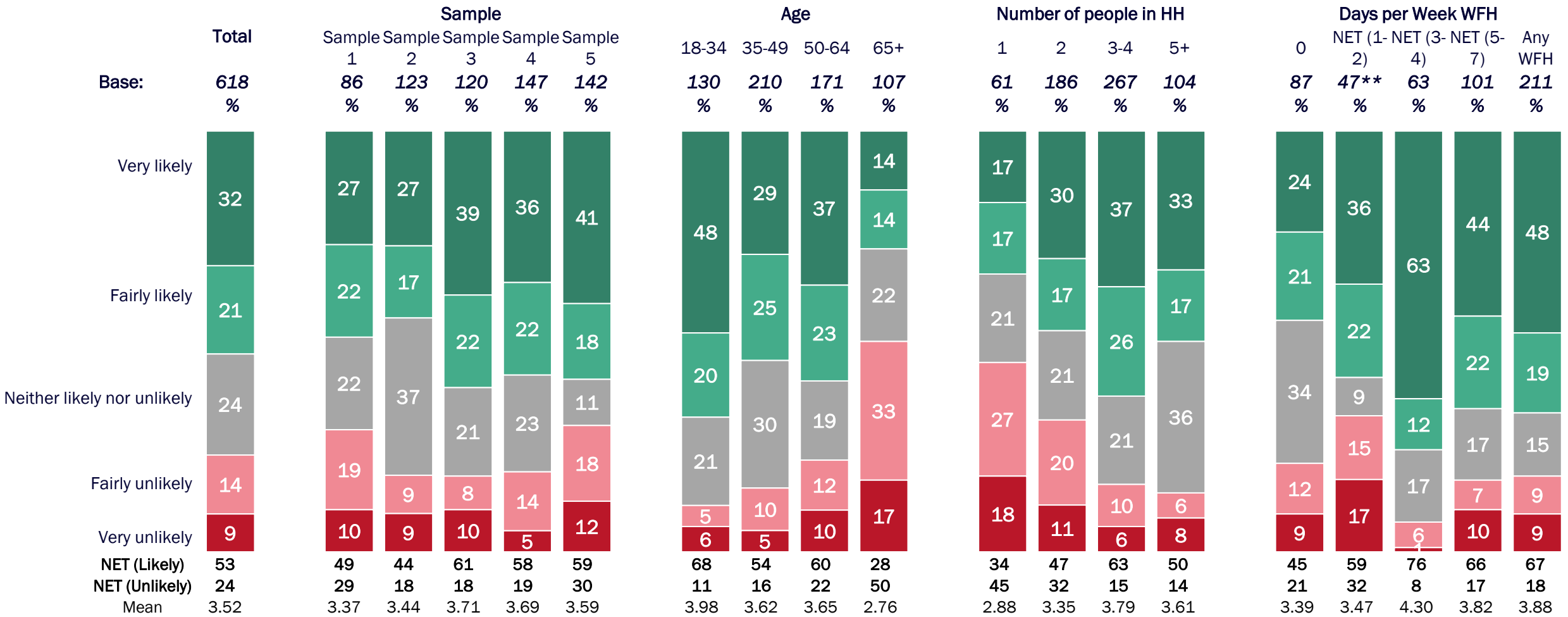
Only 1 in 4 are aware of fibre availability in their area currently. This decreases in samples 3, 4, & 5. Interestingly, there are also fewer in samples 4 & 5 who are unsure of availability, possibly indicating a higher appetite within these cohorts (searching for fibre?).

Q.43 You said you have not yet upgraded to full fibre broadband, or you don't know what technology your broadband connection is based on. Do you know if it is possible now to get full fibre at your house or whether it is likely to be available to your house in the near future e.g. 2 years?

*Given the challenge for respondents in terms of understanding fibre/terms/what service they have, after we asked if they had fibre, at the analysis stage we further filtered based on speed (249 or less mpbs) and service provider.

Likelihood of Getting Full Fibre if Available

Base: All claiming not to have full fibre n=618*



Likelihood varies depending on cohort, with those in more rural sample areas (3 to 5) being more likely to avail, as well as those under 65, those who work from home more often, and those with more people in their household.

*Given the challenge for respondents in terms of understanding fibre/terms/what service they have, after we asked if they had fibre, at the analysis stage we further filtered based on speed (249 or less mpbs) and service provider.

** Caution Small Base Size

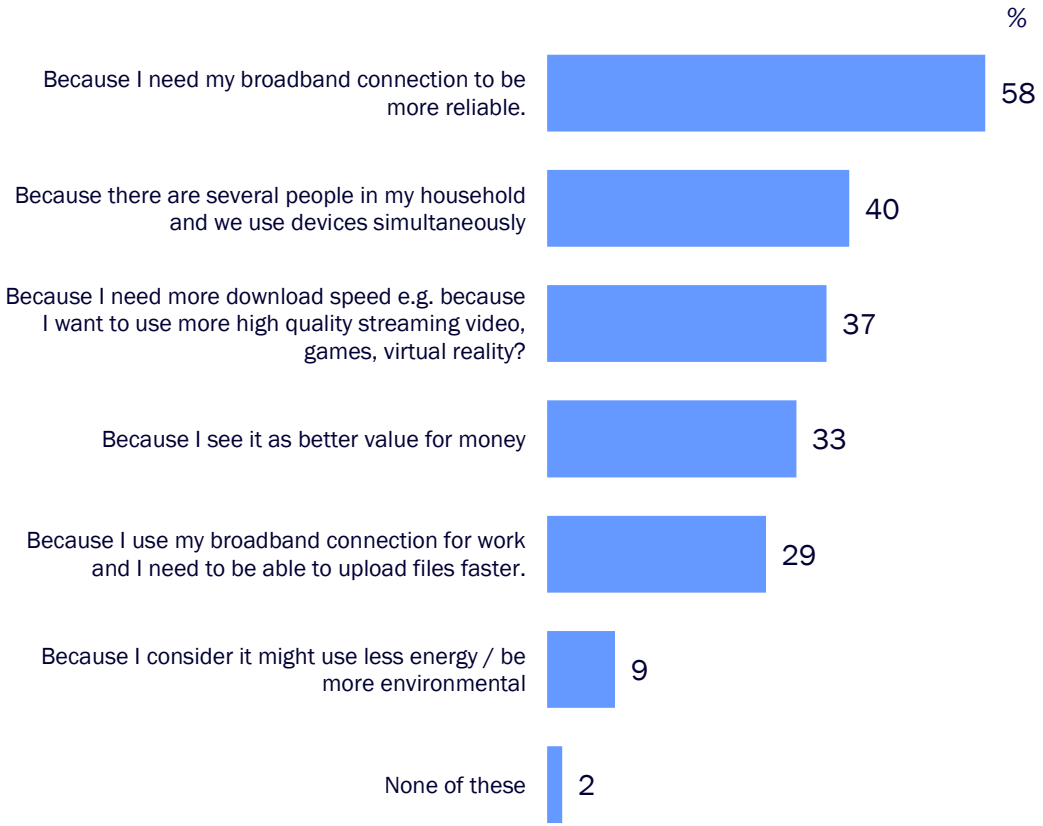
? Q.44 How likely would you be to consider taking up a full fibre (or other high speed) broadband service if it is or becomes available in your area?

Reasons For and Against getting Full Fibre if Available

Base: All claiming not to have full fibre and likely to consider 358* / All claiming not to have full fibre and unlikely to consider n = 260*

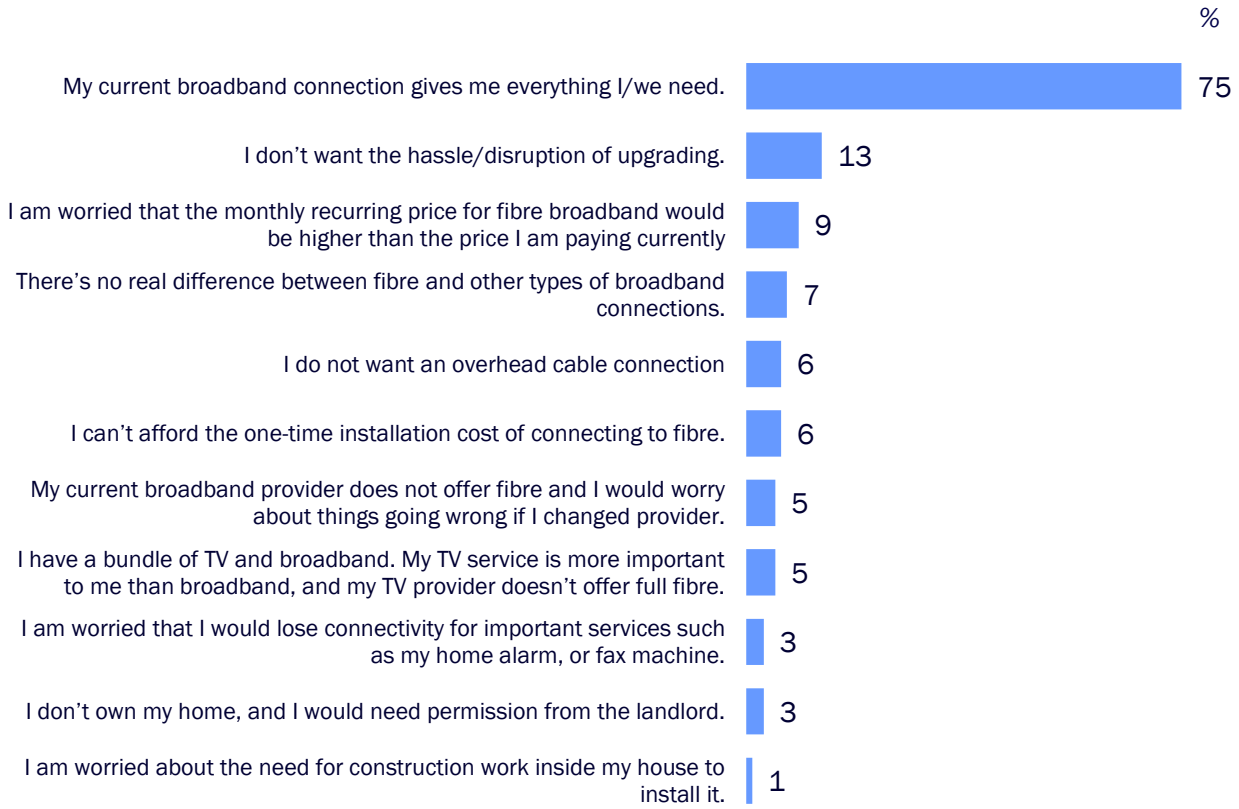
Q.45) Reasons to subscribe to Full Fibre

Base: All likely to consider taking up full fibre BB service 358



Q.48) Reasons to not subscribe to Full Fibre

Base: All unlikely to consider taking up full fibre BB service 260



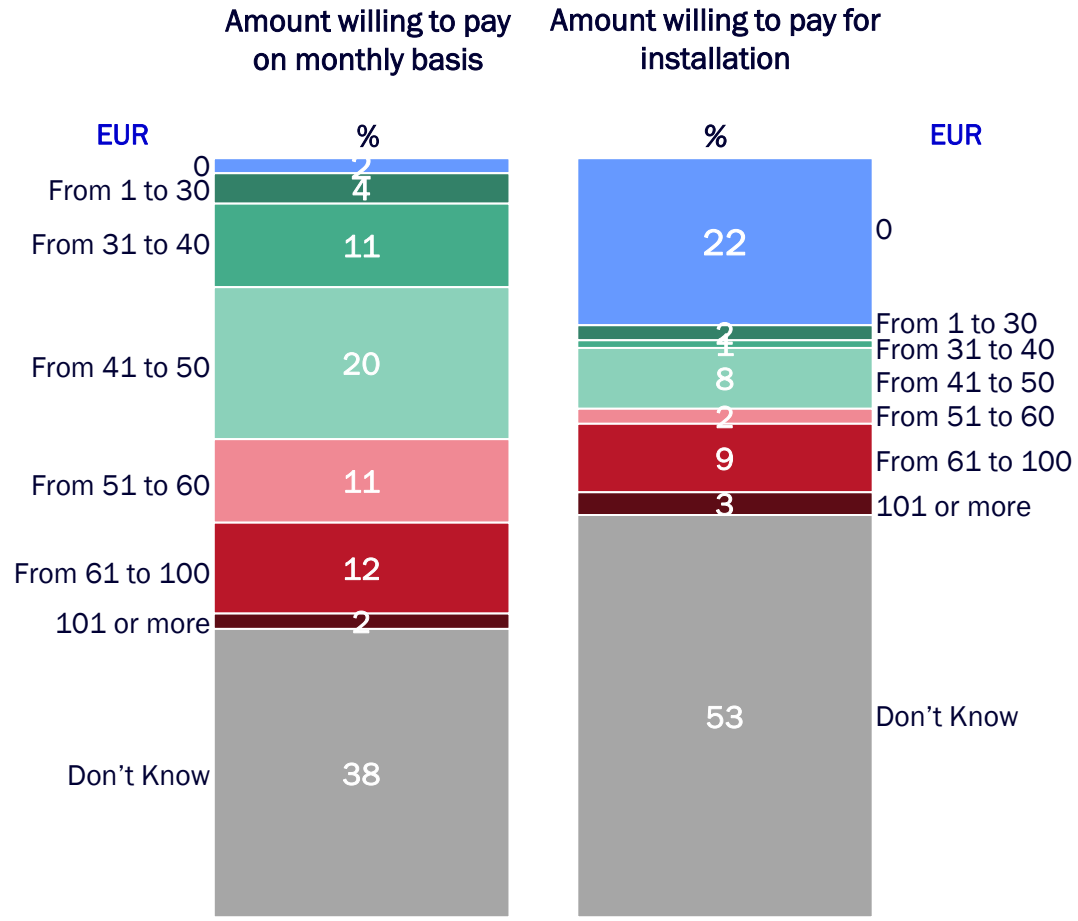
The key determinant for consumers is whether or not their current broadband service is suitable / reliable. Unsurprisingly, those in sample area 5 show higher incidence of a need for broadband to be more reliable (75%).

*Given the challenge for respondents in terms of understanding fibre/terms/what service they have, after we asked if they had fibre, at the analysis stage we further filtered based on speed (249 or less mpbs) and service provider.

Q.45 What are the main reasons why you want to subscribe to full fibre?
Q.48 What are the main reasons why you do not want to upgrade your broadband connection to full fibre?

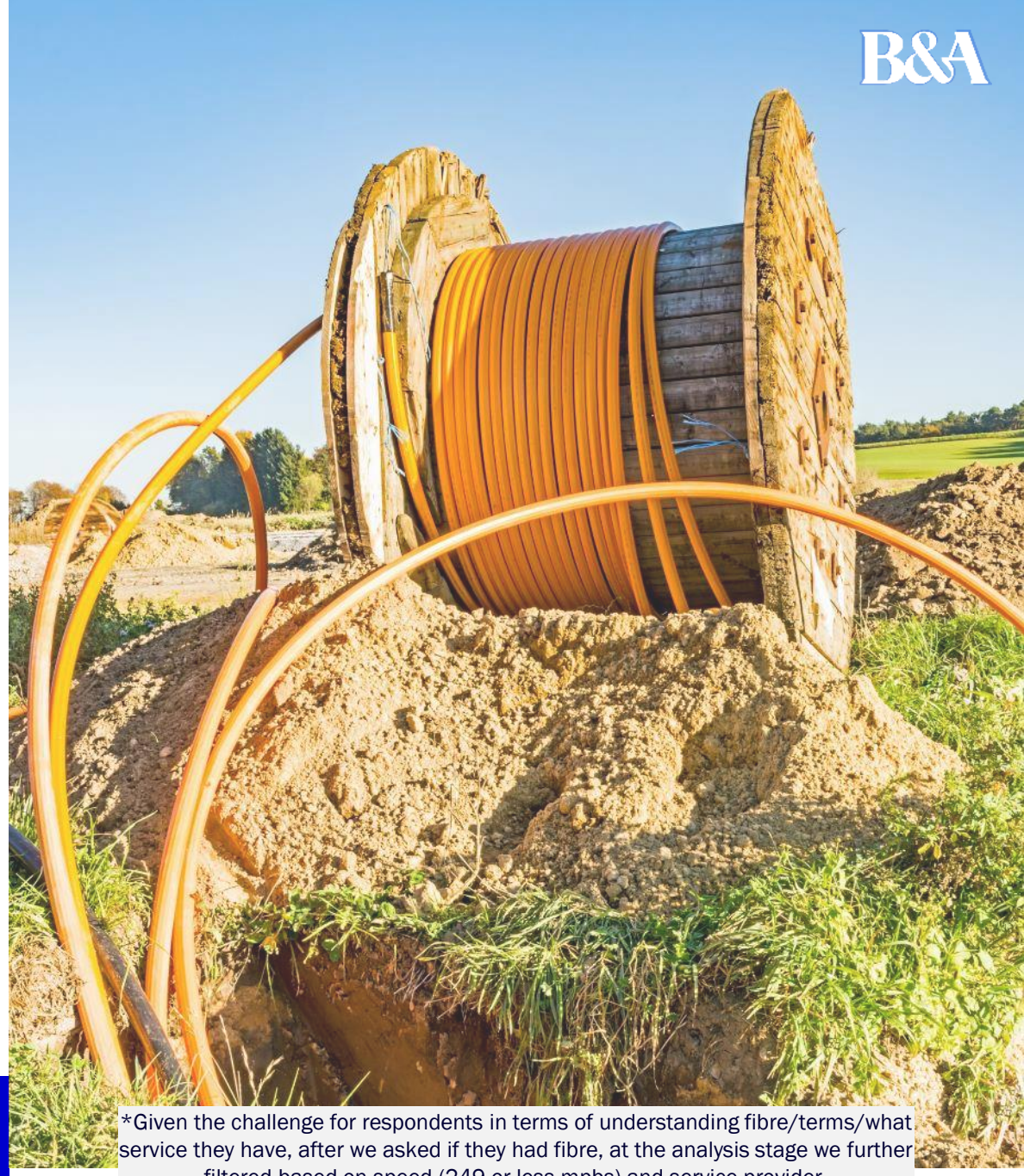
Willingness to Pay for Full Fibre

Base: All claiming not to have full fibre n=618*



	Amount willing to pay on monthly basis	Amount willing to pay for installation
Mean	€54	€41
Median	`€50	€30

Over 1 in 5 feel installation should be free, paired with a generally smaller appetite to pay for installation compared to the amount respondents are willing to pay for the monthly service (mean: €54)



*Given the challenge for respondents in terms of understanding fibre/terms/what service they have, after we asked if they had fibre, at the analysis stage we further filtered based on speed (249 or less mpbs) and service provider.

Q.46 How much would you be willing to pay for a fibre service on a monthly basis?
Q.47 How much would you be willing to pay for installation of a fibre service?

Amount Willing to Pay for Monthly Fibre Service x Demos

Base: All claiming not to have full fibre n=618*

	Total	Sample					Age				Days per week WFH					No. of people in HH using BB			
		Sample 1	Sample 2	Sample 3	Sample 4	Sample 5	18-34	35-49	50-64	65+	0	NET (1-2)	NET (3-4)	NET (5-7)	Any WFH	1	2	3-4	5+
€/month	*618*	*86*	*123*	*120*	*147*	*142*	*130*	*210*	*171*	*107*	*87*	*47***	*63*	*101*	*211*	*61*	*186*	*267*	*104*
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
0	2	1	7	1	2	0	2	4	1	2	7	1	-	1	1	1	1	1	7
From 1 to 30	4	3	4	5	7	4	1	6	3	5	3	6	5	3	4	3	4	4	5
From 31 to 40	11	11	12	12	7	17	12	9	14	10	2	15	16	14	15	14	7	15	7
From 41 to 50	20	18	20	24	19	23	23	23	14	21	15	24	35	20	25	14	25	18	19
From 51 to 60	11	12	9	11	11	6	10	9	16	7	9	26	8	22	19	7	12	10	9
From 61 to 100	12	18	8	5	9	11	6	15	15	10	22	4	11	13	10	3	13	13	12
101 or more	2	3	1	3	-	-	0	2	4	1	2	-	12	2	5	1	2	2	4
Don't Know	38	34	40	39	45	38	47	33	33	45	41	24	13	26	22	57	36	37	37
Mean	53.61	59.21	46.27	50.47	50.32	52.36	50.29	53.73	58.34	49.47	54.25	51.00	60.33	59.18	57.73	45.80	55.07	53.86	53.18

Those in Sample areas 3, 4, & 5 are less willing to spend more money, regardless of their initially higher appetite for fibre connection (given worse connection currently). Those working from home show higher amounts willing to pay for fibre, given reliance for work.

? Q.46 How much would you be willing to pay for a fibre service on a monthly basis?

*Given the challenge for respondents in terms of understanding fibre/terms/what service they have, after we asked if they had fibre, at the analysis stage we further filtered based on speed (249 or less mpbs) and service provider.

**Caution small base size

Amount Willing to Pay for Fibre Installation x Demos

Base: All claiming not to have full fibre n=618*

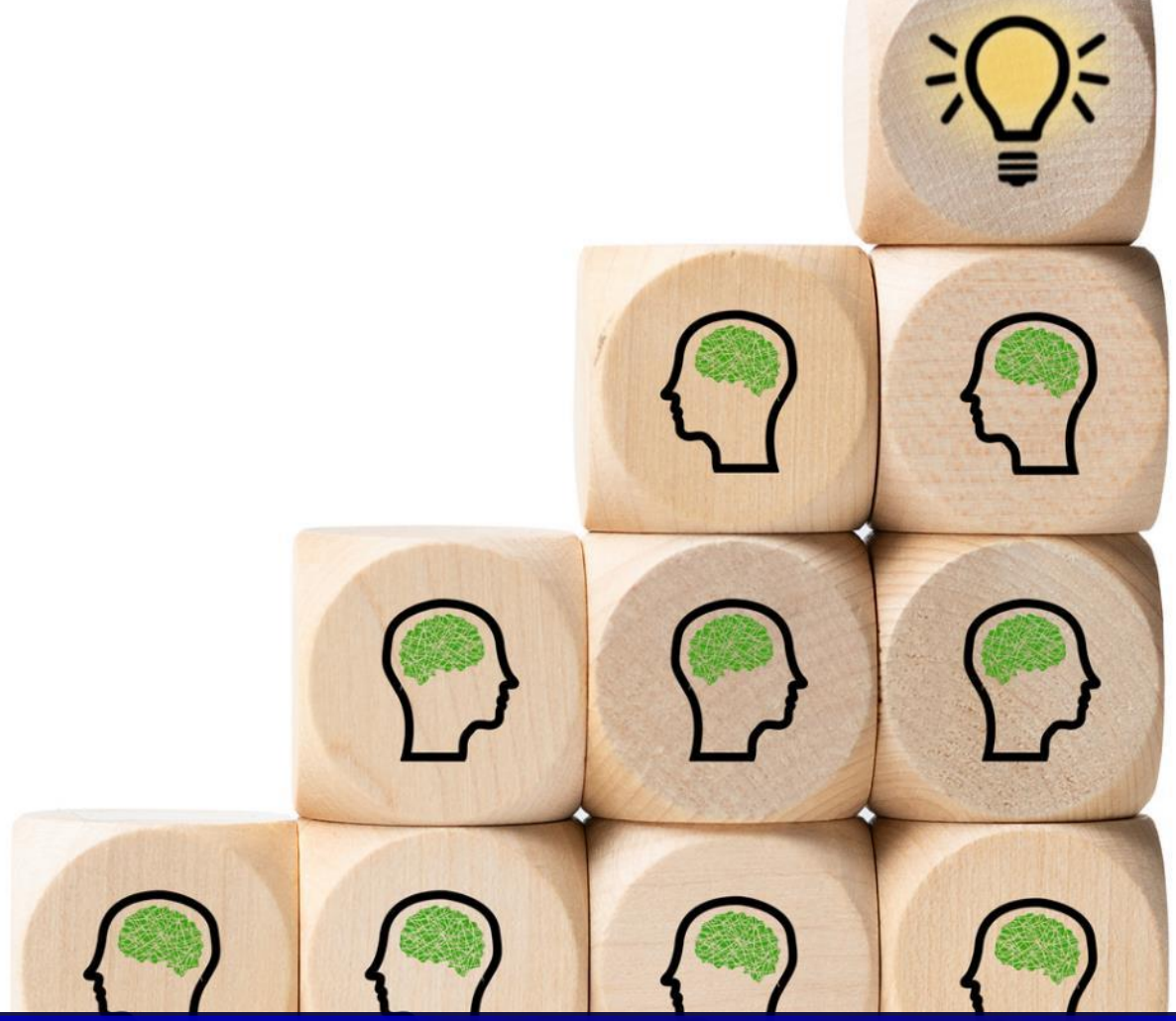
	Total	Sample					Age				Days per week WFH					No. of people in HH using BB			
		Sample 1	Sample 2	Sample 3	Sample 4	Sample 5	18-34	35-49	50-64	65+	0	NET (1-2)	NET (3-4)	NET (5-7)	Any WFH	1	2	3-4	5+
€	*618*	*86*	*123*	*120*	*147*	*142*	*130*	*210*	*171*	*107*	*87*	*47***	*63*	*101*	*211*	*61*	*186*	*267*	*104*
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
0	22	23	29	18	18	22	16	22	22	27	39	29	26	44	16	13	21	24	25
From 1 to 30	2	5	-	-	2	1	0	2	2	6	-	2	-	5	4	12	3	1	1
From 31 to 40	1	2	0	1	0	-	-	1	2	-	-	3	1	-	10	-	1	2	-
From 41 to 50	8	11	4	9	5	10	6	10	10	7	1	11	11	9	15	4	6	13	4
From 51 to 60	2	4	1	-	-	1	-	1	5	-	-	2	3	1	-	1	3	0	2
From 61 to 100	9	6	11	12	13	5	8	11	8	10	9	15	20	16	5	9	10	10	6
101 or more	3	2	3	3	3	1	4	3	2	1	3	6	8	6	2	-	4	2	3
Don't Know	53	47	52	57	58	60	66	49	48	49	48	32	32	20	48	61	53	49	58
Mean	40.86	35.25	37.06	48.29	53.52	35.36	47.83	43.86	40.68	32.19	25.34	49.38	58.95	41.34	39.04	37.45	44.64	39.99	36.73

The same trends mentioned for monthly service cost, also follow through in regard to installation.

Q.47 How much would you be willing to pay for installation of a fibre service?

*Given the challenge for respondents in terms of understanding fibre/terms/what service they have, after we asked if they had fibre, at the analysis stage we further filtered based on speed (249 or less mpbs) and service provider.

**Caution small base size



Key insights

4 in 5

of those surveyed claim to have fixed internet / broadband at home

44%*

Of decision makers who work state they work from home online at least one day or more from home

*note based on all decision makers

Key Insights 1/5

Ownership and Spend

Just over 4 in 5 of those surveyed claim to have fixed internet / broadband at home, while 44% note they **work from home online** at least one day or more from home, with **1 in 3 at least 3 days a week**. The latter are significantly more likely to be in Sample area 1, 35-49 years, middle class (ABC1) with higher broadband speeds.

Those **without broadband** are much more likely to be from sample areas 4 & 5, over 65, rural, lower socio-economic class, and from the farming community. For 44% of those without broadband, they are simply not interested in acquiring it, 30% have access through a smartphone, while 1 in 4 cite some form of economic barrier.

When focusing on broadband speeds, a **significant minority were unaware of their speeds** (44%), with a lack of awareness increasing substantially among over 65s. Knowledge of having higher speeds more evident in more urban areas (sample areas 1 & 2), 35- to 49-year-olds, and middle-class households, hence the correlation with working from home.

Traditional / basic telephone copper lines (ADSL) and FWA are most prominent in sample areas 3 to 5, with **fibre stronger in sample areas 1 and 2**.

Although the average spend per month on broadband service is €62, the cost varies significantly depending on the various cohorts. **Those living in samples 3, 4, & 5 have a significantly lower average cost, most likely reflecting the higher incidence of comparably weaker download speeds** (correlation is seen between higher broadband speeds and higher cost, and vice versa). Interestingly, **older people cite paying the highest average cost** across age brackets but have the lowest understanding of speeds for example.

Consumers show **stickiness,** with 54% stating it is unlikely that they will switch. However, **likelihood of switching is higher among those in Sample 5,** likely due to current weaker broadband speeds.

Reliance on broadband is clearly very high with almost **4 in 5 citing broadband as a definite essential service.**

6 - 7

devices are used (per household)

3 in 5

have devices older than three years

Key Insights 2/5

Device & Broadband Usage

From the listed, **connected devices**, on average 6 - 7 (6.5) devices are used (per household, with a significantly higher number used among middle class households (8.4), larger households with 5+ people (10.4) and amongst younger population cohorts.

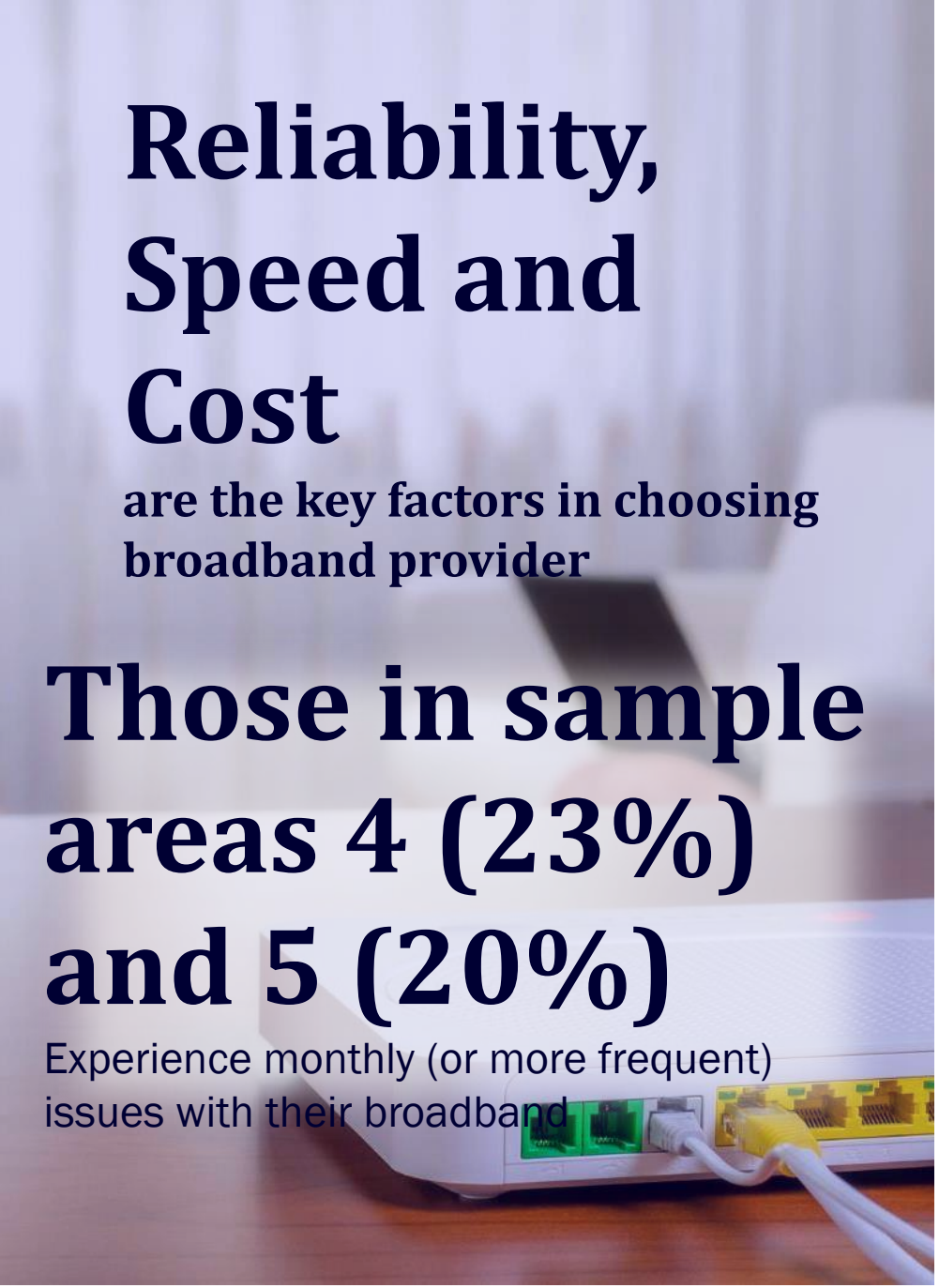
There is also a clear relationship to broadband speed with those with higher speeds showing higher numbers of devices used, as well as those in more urban sample areas. This indicates the possible impact of poorer broadband connection, with clear appetite to engage with devices online in ownership, but the broadband connection dictating the level of engagement.

3 in 5 have devices older than three years, and over 4 in 5 are accessing via WiFi, rather than a cable connection.

This is reinforced regarding the usage frequency of online services, with frequency highest in sample area 1 and among those with broadband speeds of 500+mbps.

Amongst the sample, high incidence recorded for search, social, streaming, and connection - everyday usage of search engines (80%), social media (75%), streaming platforms (61%), and emailing (53%) are highest.

Usage of these online services are not predicted to increase substantially over the next 12 months, with the vast majority of respondents claiming that usage will remain the same. However, it should be noted that those in sample area 4 are more likely to increase usage. There is also some indication that those with less speedy broadband will increase their usage (14% of those with speeds of 24 to 99mbps note they will increase usage of streaming services). Therefore, pressure may come from within already pressurised areas, as well as increased bandwidth requirements due to content enhancements.



Reliability, Speed and Cost

are the key factors in choosing broadband provider

Those in sample areas 4 (23%) and 5 (20%)

Experience monthly (or more frequent) issues with their broadband

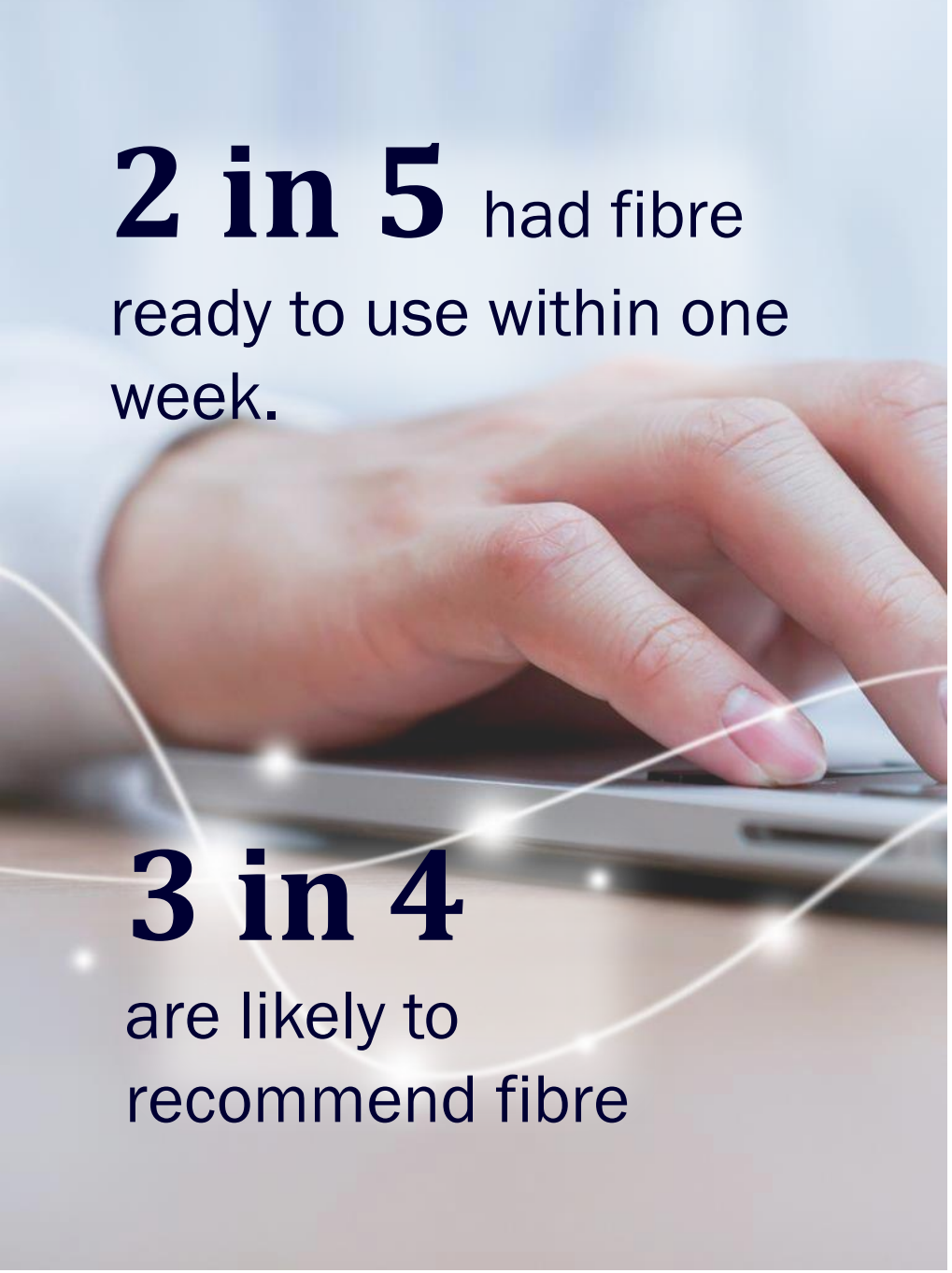
Key Insights 3/5

Broadband Service & Issues Experienced

The most (very) important factors in selecting broadband services centered on reliability (74%), speed (71%), cost (68%) followed by customer service (62%). The key factor for those in the more rural sample 5 is the reliability of the service (79% very important). For those working from home (at any capacity), speed of connection (83% very important) is a vital factor. The top three factors (reliability, speed, and cost) remain the same across the 5 sample areas. It is interesting to note that in sample area 1, a higher level of importance is indicated for promotions, installation cost, bundling, and length of contract – illustrating their exposure to more marketing and advertising by suppliers and perhaps more experience in the broadband market.

The vast majority of respondents are satisfied with their broadband service across all metrics, however those in samples 4 & 5 are notably less satisfied (and they experience more issues). This is across the board with, for example 42% of those in sample 4 experiencing an inability to go online at all, compared to 33% in general. The most cited monthly+ issue (across all sample areas) is broadband speed decreasing significantly in the evening.

When focusing on attempts to solve problems with broadband service, the most common solution is turning off the router and turning back on again - this is also the most effective, with almost 2 in 3 noting an improvement. Following this, there is a substantial drop off in terms of usage and effectiveness of other solutions. It should be noted here that those living in sample areas 4 & 5 are more likely to note no improvement as a result of these actions.



Key Insights 4/5

Experience of Fibre Broadband Migration

Over 2 in 5 with full fibre had it ready to use within one week of ordering. However, this varies significantly across sample areas, with only 18% of those in Sample Area 5 having fibre ready to use within one week, with a 1 - 4 week wait time more prevalent.

Satisfaction levels are very high in terms of migration to fibre, with over 4 in 5 citing satisfaction with all metrics. Speed of connection & customer service were most satisfying at 93%.

For half of those with fibre, the installation was free, while a further 28% were not sure of the costs. Free installation was more likely in urban sample areas 1, 2, & 3 which is reinforced by the higher average cost of installation among those in sample areas 4 & 5.

Following installation, almost 9 in 10 noted speedier connections.

Three quarters are likely to recommend fibre, increasing significantly among those in Sample 5, indicating that fibre has aided their connectivity issues (a common trend among those in Sample 5 throughout the research).

Key Insights 5/5

Appetite for Fibre

Only 1 in 4 of those without fibre are aware of current fibre availability in their area. Interestingly, there are also fewer in sample area 5 who are unsure of availability, possibly indicating a higher appetite within these cohorts with these householders likely to seek out information.

Over half are likely to get fibre if available. However, this varies depending on cohort, with those in more rural sample areas (3 to 5) being more likely to avail, as well as those under 65, those who work from home more often, and larger households.

When deciding on fibre broadband, the key determinant for consumers is whether or not their current broadband service is suitable / reliable. Unsurprisingly, those in sample area 5 show higher incidence of a need for broadband to be more reliable.

When focusing on the amount consumers are willing to pay, over 1 in 5 feel installation should be free and over half simply don't know the cost but on average, people indicate a €41 installation fee. Respondents claim they are willing to pay on average €54 per month for broadband service, with the median being €50.

A lack of knowledge of prices is clearly evident.