ICT Consumer Survey

Reference: ComReg 15/123a

Commission for Communications Regulation

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Background and objectives

- The Commission for Communications Regulation (ComReg) wished to conduct ICT survey among a nationally representative sample of household decision makers in relation to telecommunications and broadcasting services.

- The purpose of the research is to assess the following:

  - Access and Usage of ICT services
  - Understand behavioural change in ICT usage over time
  - Gauge awareness of cost of ICT services and level of satisfaction with received services
  - Estimate price sensitivity in the market
  - Estimate incidence of bundling and switching ICT services in the Irish Consumer Market

Methodology

- 1,039 interviews were conducted face to face among a nationally representative sample of telecommunication decision makers.
- Interviews were quota controlled by gender, age, social class and region in order to accurately represent the intended target market.
- Results from the survey are examined by 3 core geographic regions which have been quota controlled to ensure a regionally representative sample

Region	Unweighted Sample	Weighted Representative Sample
Dublin	319	291
Total Urban ex Dublin	368	374
Rural	352	374

- Urban/Rural classification based on population size where population of sampling point less than 5,000 is rural and more than 5,000 is urban.
- All interviews were conducted via CAPI (handheld interviewing device)
- Fieldwork was conducted between 16th June – 16th July 2015.
- Interviews were conducted with the person responsible for decision making in relation to telecommunications and broadcasting services within each household. This will under represent those in the age group 18-24 versus their share of the total population.

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Notes on presentation

- Comparisons with results from the 2013 ICT Consumer Survey have been made where questions in 2015 survey were phrased in exactly the same or very similar way to questions asked in 2013 survey. However, it is important to note that in 2013 the Consumer ICT survey was conducted over the phone while in 2015 the Consumer ICT survey was conducted face to face.

- Throughout the presentation (*) is used to denote sample sizes of a small base or a result less than 1%. Results based on small sample sizes are indicative only and do not stand to statistical scrutiny.

- Some percentages shown will add to 99% or 100% due to rounding at the data analysis stage.

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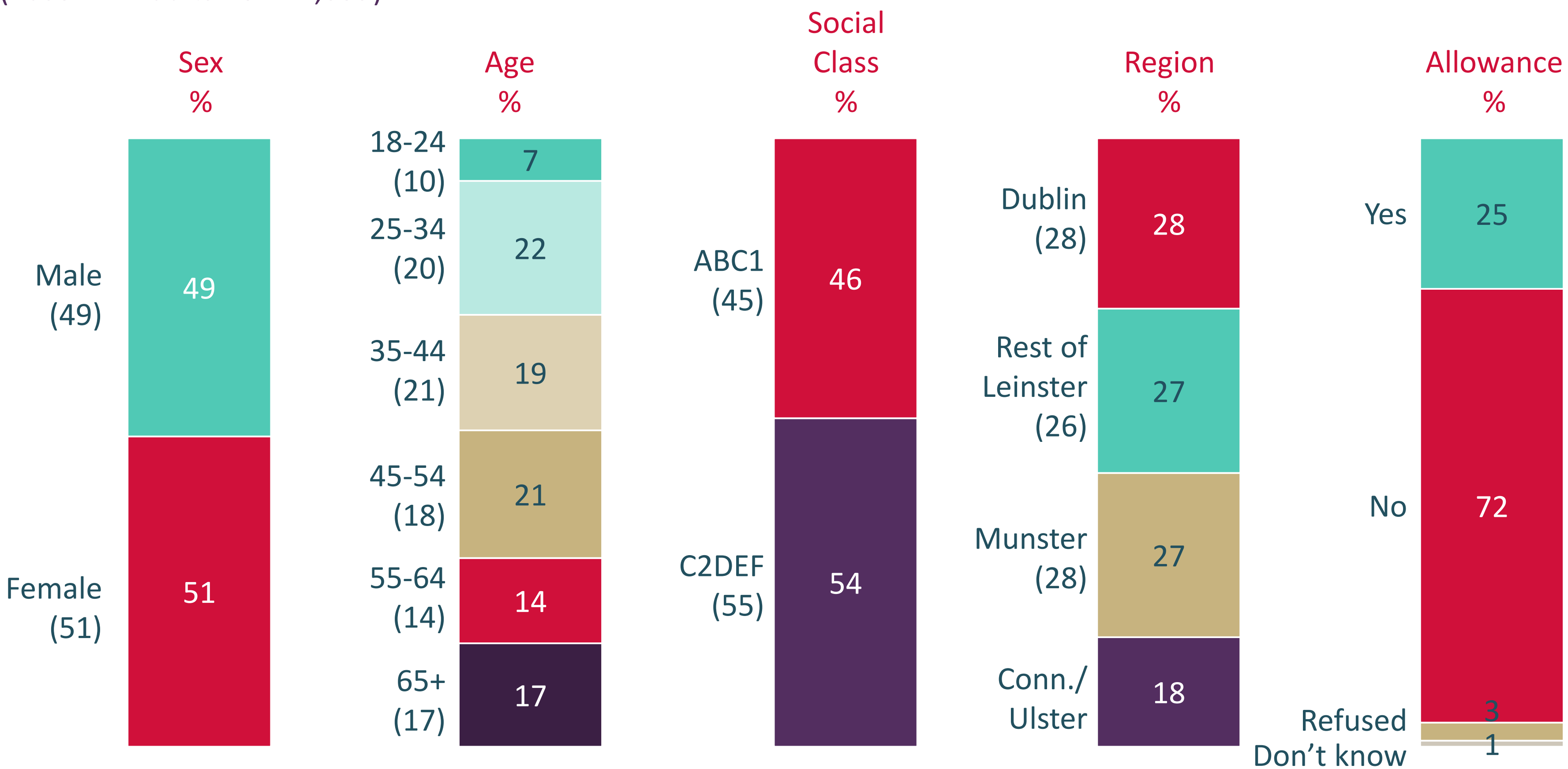
Sample profile

(Base: All Adults 18+ - 1,039)



( ) = All Adults 18+

The telecommunication decision maker sample falls in line with national population statistics with the exception of a lower proportion among 18-24's

Presentation structure

Key Findings

Key findings – ICT Service Ownership

Mobile Phone

Ownership rate – 97%

Fixed Broadband

Nationally, 76% have access to Fixed Broadband
89% in Dublin. 66% in Rural Ireland

TV Access

96% have access to TV services at home.

Household Access

To ICT Services

Landline

67% have home landline service, but service ownership varies significantly across age categories. 46% of 18-24's have home landline while 88% of those aged 65+ have home landline.

Mobile Broadband

10% have access to mobile broadband at home

Non-Broadband Homes

15% do not access any broadband service at home

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Key findings - Bundles

Bundle ownership rates vary across regions

Bundling rates:
Dublin – 77%
Total Urban – 70%
Rural - 49%

Broadband + Landline is the most popular bundle type

Broadband and landline bundle accounts for 47% of all bundles

Bundle Ownership

62%

Increasing ownership of Broadband/Landline & TV bundles

This Bundle type accounted for 33% of all bundles in 2015 compared to 16% in 2013

Intention to Switch

10% of current bundle owners intend to switch

Switching

39% of respondents purchasing bundled services switched provider in order to avail of these services

Key Findings - Home Landline Telephone Service

Largest providers of landline telephone service in 2015

Eircom – 46% (56% in 2013)

UPC – 23% (18% in 2013)

Vodafone – 17% (16% in 2013)

Sky – 11% (0% in 2013)

Geographical variations in market shares

Eircom – 27% in Dublin vs 67% in Rural areas

UPC – 54% in Dublin vs 2% in Rural areas

Satisfaction with landline service providers

Nationally – 85%

(up from 77% 2013)

Landline Ownership

67%

Landline - Usage

35% of landline service purchasers claim to have landline to facilitate access to broadband service

Switching

37% have previously switched Landline supplier – higher in Bundle population 41% versus non bundle population 22%.

10% likely to switch supplier in future – down from 27% in 2013

Length of Time with Supplier

62% of landline subscribers have been with the same landline supplier for over three years with this figure rising to 86% among respondents who purchase standalone landline services

Key Findings - Mobile Phone

Largest providers of mobile telephone service in 2015

Vodafone – 42% (40% in 2013)

Three Group – 28% (33% in 2013)

Eircom Group Mobile – 23% (24% in 2013)

Tesco Mobile – 5% (0% in 2013)

Satisfaction with mobile phone service providers

90% in 2015 up from 76% in 2013

Mobile Phone Ownership

97%

Mobile - Usage

Social Media/Instant Messaging usage frequency is higher for females and those aged 18-24.

12% of respondents using Social Media/Instant Messaging have stopped sending traditional texts (SMS) as a result.

Switching

73% have been with the same mobile phone service provider for longer than 3 years.

36% had previously purchased mobile phone service from a different provider.

10% likely to switch mobile phone service provider within the next 12 months down from 18% in 2013

Prepay v Post-pay

Post-pay segment continues to grow with 47% of all mobile phone service owners having a post-pay type of subscription compared to 43% in 2013

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Key Findings – Fixed Broadband

Largest providers of fixed broadband service in 2015

Eircom – 35% (39% in 2013)

UPC – 28% (25% in 2013)

Vodafone – 21% (17% in 2013)

Sky – 12% (1% in 2013)

Satisfaction with fixed broadband service providers

87% in 2015 up from 68% in 2013

Fixed Broadband Ownership

76%

Geographical variations in market shares

Eircom – 15% in Dublin vs 53% in Rural areas

UPC – 67% in Dublin vs 1% in Rural areas

Switching

56% have been with the same fixed broadband service supplier for longer than 3 years.

38% had previously purchased fixed broadband service from another provider

11% intend to switch supplier in the next 12 months – down from 29% in 2013

Fixed Broadband - Usage

Fixed broadband service is most commonly used for browsing internet/using email. Interactive use of broadband significantly higher among those 18-34.

39% using VOIP services.

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Key Findings – Mobile Broadband

Largest providers of mobile broadband service in 2015

Three Group – 59% (44% in 2013)

Vodafone – 23% (25% in 2013)

Eircom Group Mobile – 12% (22% in 2013)

Tesco Mobile – 3% (0% in 2013)

Mobile Broadband Ownership

10%

Satisfaction with Mobile Broadband Service Providers

74% in 2015 up from 57% in 2013

Mobile Broadband - Usage

Mobile broadband service is most commonly used for browsing internet/using email. Interactive use of broadband significantly higher among those 18-34.

Switching

51% have been with the same mobile broadband service provider for longer than 3 years.

24% had previously purchased broadband service from another service provider

26% intend to switch supplier in the next 12 months – down from 40% in 2013

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Key findings – TV services

TV homes by main reception type in 2015

Sky – 49% (53% in 2013)
UPC – 23% (29% in 2013)
Saorview – 19% (9% in 2013)

Usage of online paid for TV services (e.g. Netflix)

9% of all Households use Netflix – rising to 18% in Dublin

7 Hours per week – average time spent on Netflix

14% of online paid for TV streaming services users have claimed to have stopped watching live/scheduled TV

Key Stats
TV Services

96%

Geographical variances in market shares

Sky – 27% in Dublin vs 59% in Rural areas

UPC – 59% in Dublin vs 2% in Rural areas

Saorview – 3% in Dublin vs 31% in Rural areas

No TV Subscription

2% of respondents nationally state they have no TV subscription – rising to 6% among 18-24 year olds.

ICT Service Ownership

ICT services accessed at home

(Base: All Decision Makers 18+, 1,039)

	Total 2015 %	Total 2013 (1,001) %	Area: Dublin (291) %	Area: Total Urban (665) %	Area: Urban Less Dublin (374) %	Area: Rural (374) %	Social Class: ABC1 (426) %	Social Class: C2DEF (613) %
Mobile Phone service	97	97	98	97	97	96	98	96
TV e.g Sky, UPC, Saorview	96	85	95	95	96	97	97	96
Fixed Internet/Broadband at home through a landline, fibre, cable TV or wireless service provider	76	66	89	82	77	66	86	70
Home Landline telephone service	67	69	77	71	66	61	74	62
3G/4G Mobile Broadband (through a dongle attached to computer, Mi-Fi devices, 3G/4G sim card in Tablets)	10	22	4	8	11	14	10	10

Increase in ownership of TV and Fixed Broadband services while Mobile Broadband service ownership is down from 22% in 2013 to 10% in 2015.

ICT services accessed at home

(Base: All Decision Makers 18+, 1,039)

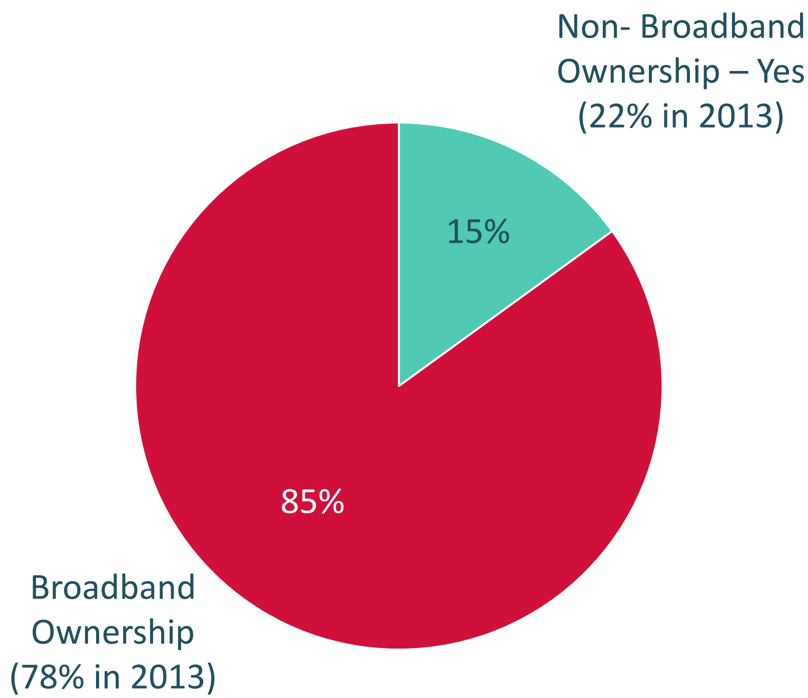
	Total 2015 %	Total 2013 (1,001) %	Gender: Male (530) %	Gender: Female (509) %	Age: 18-24 (229) %	Age: 25-34 (197) %	Age: 35-44 (218) %	Age: 45-54 (218) %	Age: 55-64 (145) %	Age: 65+ (177) %
Mobile Phone service	97	97	95	98	100	99	98	99	98	87
TV e.g Sky, UPC, Saorview	96	85	96	96	93	92	97	96	98	99
Fixed Internet/Broadband at home through a landline, fibre, cable TV or wireless service provider	76	66	77	76	84	78	82	81	77	58
Home Landline telephone service	67	69	69	66	46	51	62	72	77	88
3G/4G Mobile Broadband (through a dongle attached to computer, Mi-Fi devices, 3G/4G sim card in Tablets)	10	22	11	9	10	15	11	11	6	3

Significant difference in ownership of Home Landline service by age with those aged 18-24 least likely to have a landline service (46%) versus 88% ownership rate among those aged 65+.

(Q 1)

Incidence of not having broadband access in household

(Base: All Decision Makers – 1,039)



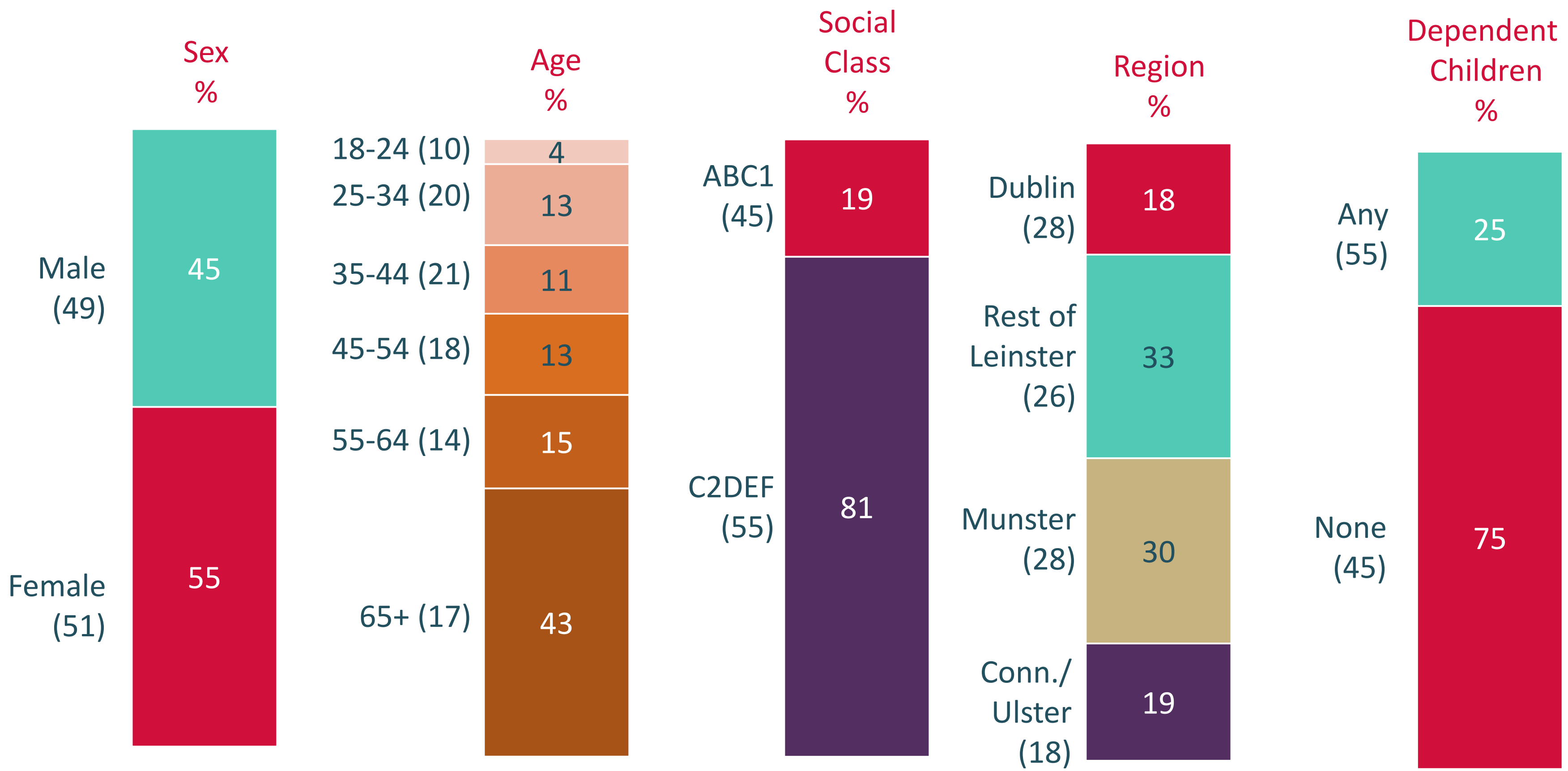
( ) = Data 2013 Consumer ICT

15% of Telecommunications Decision Makers do not have broadband service (fixed or mobile broadband service) at home. In 2013 the corresponding figure was 22%.

(Q1)

Sample profile – non broadband households

(Base: All Non-broadband Users - 157)



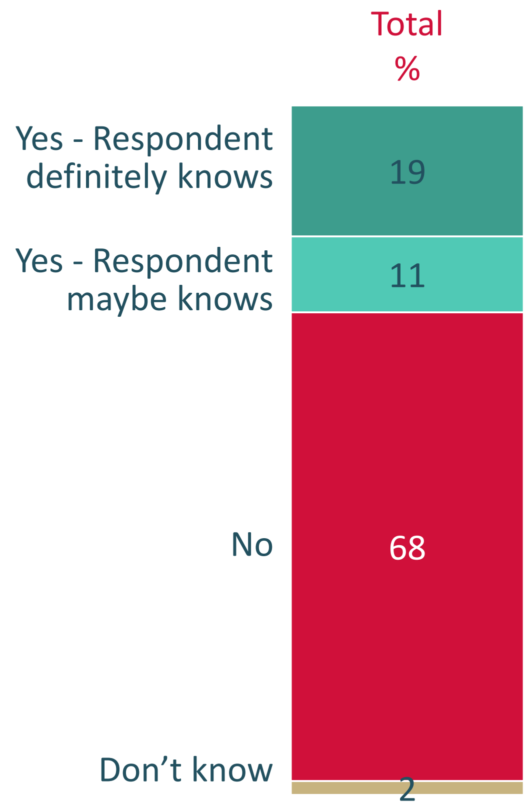
( ) –Profile of Total Sample

Non Broadband sample population is significantly older compared to total sample (65+ = 43% V 17% in total sample) and from a lower social class (C2DEF 81% V 55% in total sample).

General awareness of monthly cost of an Internet/broadband service?

(Base: All Non-broadband Users - 157)

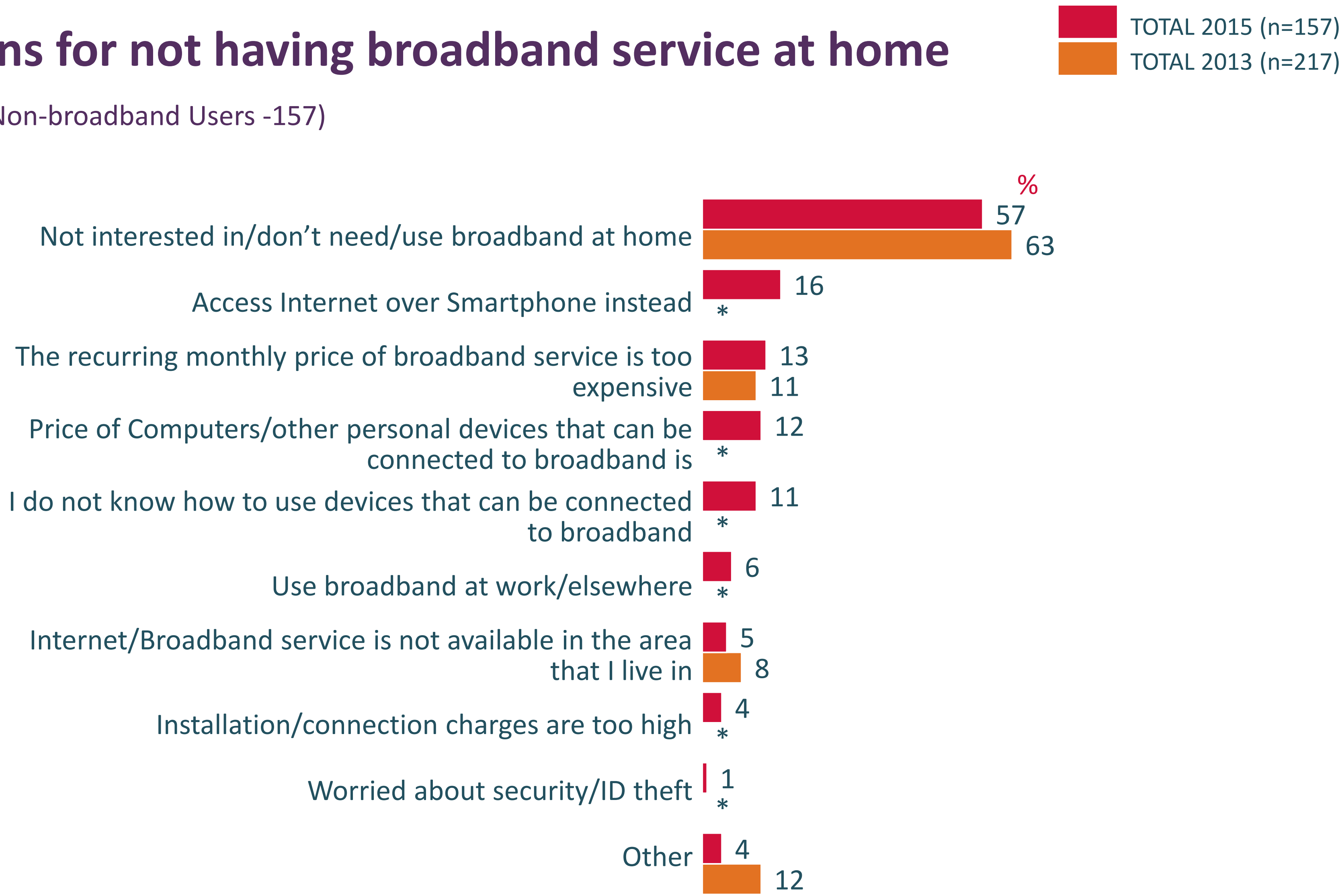
Q.2a Do you generally know how much access to Internet/broadband service costs on a monthly basis?



30% of non broadband households claim they know the monthly cost of a broadband/internet service

Reasons for not having broadband service at home

(Base: All Non-broadband Users -157)



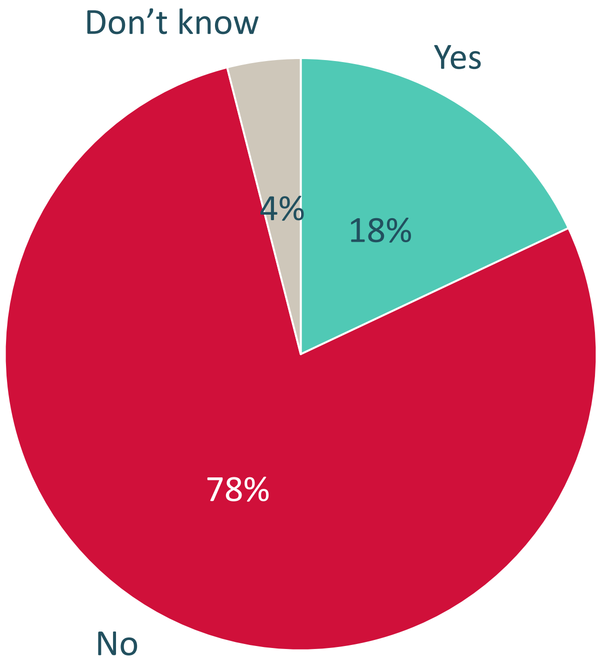
* Answer less than 1% in 2013

The main reason why consumers are not using broadband at home is simply because they don't need it – 57% state this.

(Q 2b)

Would you subscribe to a home broadband service at a price acceptable to you?

(Base: All Non-broadband Users - 157)



18% of Non-Broadband users would get broadband service if they felt that the price for this service was acceptable to them.

(Q 3)

Price point at which non-broadband users would subscribe to broadband

(Base: All Non-broadband Users Who Would Subscribe To Broadband -29*)

	Price at which would consider broadband too expensive (29)	Price at which would consider broadband is getting too expensive but still worth the cost (29)	Price at which would consider broadband is a bargain, definitely worth the money (29)	Price at which would consider broadband is so inexpensive, that you would question the quality (29)
< €40	49%	82%	100%	84%
> €40	51%	18%	0%	0%
Don't Know	0%	0%	0%	16%
Average Price Point	**€37**	**€28**	**€19**	**€13**

* Small Base Size – results not statistically significant

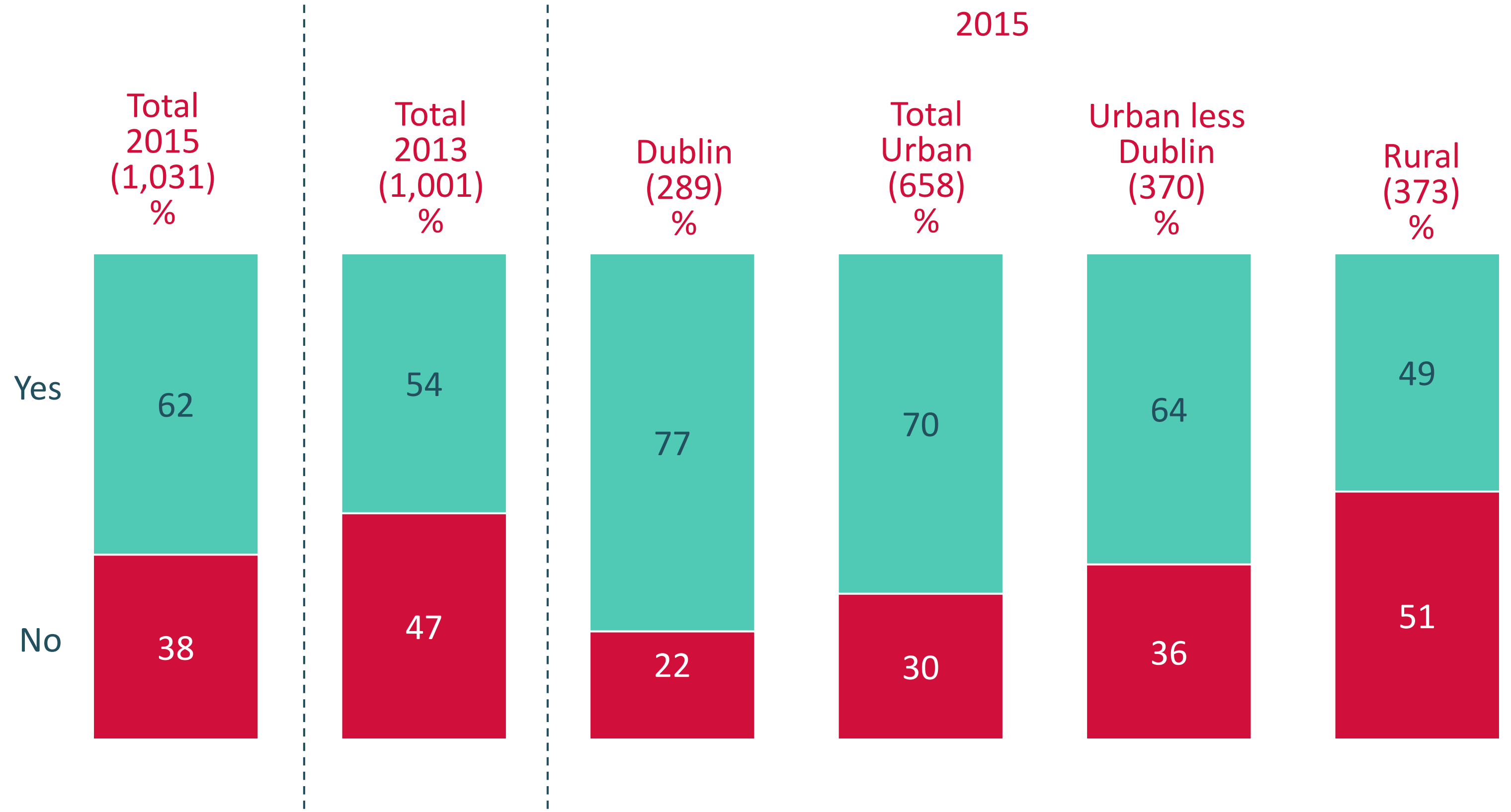
The acceptable price range for new broadband service is between €13 and €37 per month.

(Q 4a-d)

Bundles

Incidence of purchasing more than one service as part of overall package

(Base: All With More Than 1 Service – 1,031)

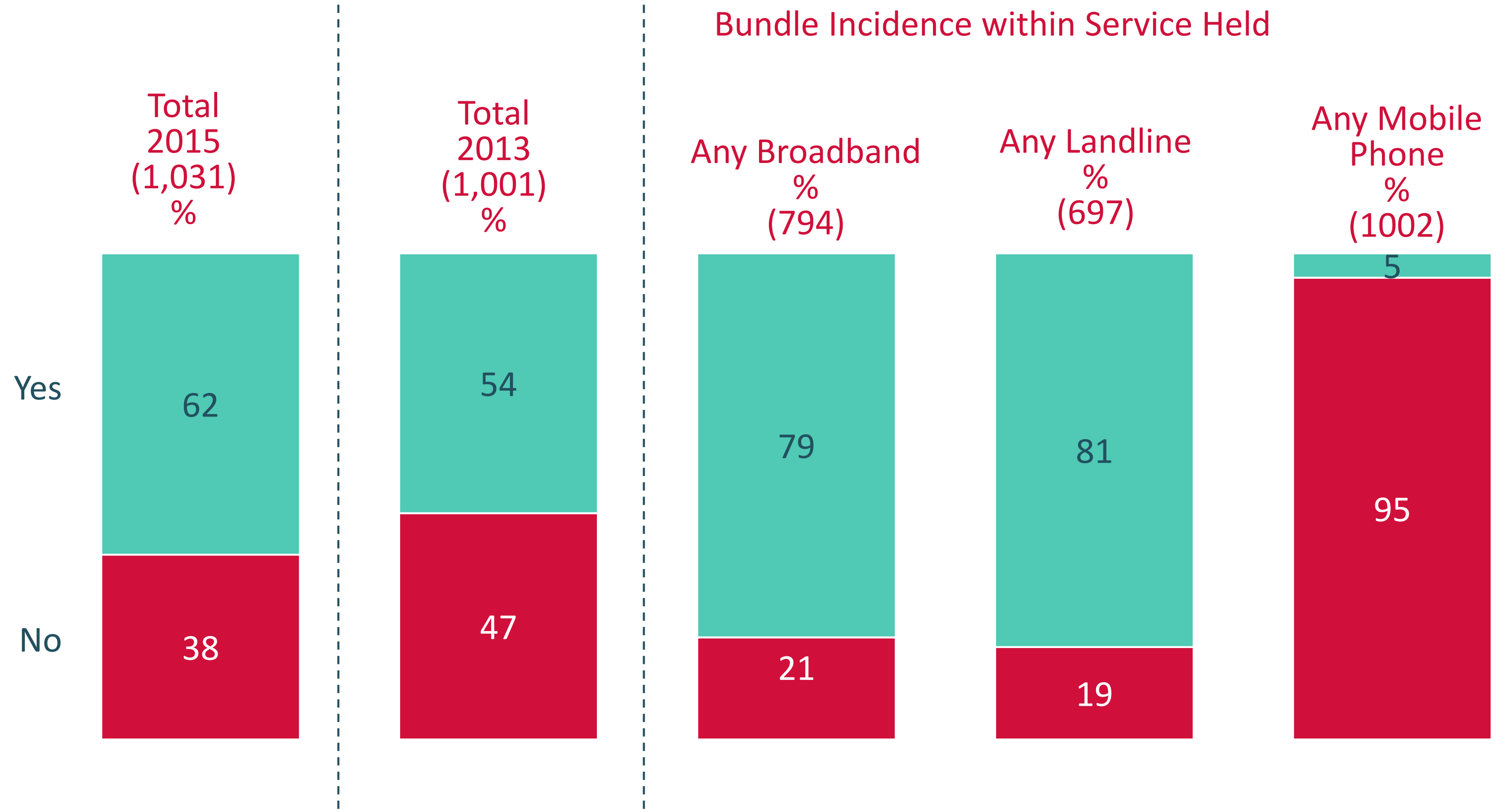


62% of respondents purchase bundled telecommunications services. Higher in Dublin at 77% versus 49% in Rural Ireland.

(Q 12)

Incidence of purchasing more than one service as part of overall package

(Base: All With More Than 1 Service – 1,031)



Those holding a landline service are most likely to purchase a landline bundle of telecommunications services.

Bundle types purchased

(Base: All Bundle Owners - 643)

Type of Bundle - Purchased			Regional -2015			
Bundle Type	Total 2015 (643) %	Total 2013 (544) %	Dublin (223) %	Total Urban (223) %	Urban less Dublin (236) %	Rural (183) %
Broadband and Landline	47	57	20	37	53	73
Broadband, Landline and TV	33	16	55	41	27	14
Broadband and TV	11	6	19	14	10	3
Broadband, Landline and Mobile Phone	5	2	3	4	5	6
Landline and TV	1	2	2	2	1	0
Broadband and Mobile Phone	1	2	0	1	2	2
Landline, TV, Broadband and Mobile Phone	1	1	0	0	0	2

The incidence of the Landline, Broadband and TV bundle has doubled compared to 2013 and is highest in Dublin (at 55% of all bundle types).

(Q13a/ai/c)

Bundle types purchased

(Base: All Bundle Owners - 643)

Type of Bundle - Purchased							
Bundle Type	Total (643) %	18-24 (43*) %	25-34 (129) %	35-44 (132) %	45-54 (149) %	55-64 (92) %	65+ (97) %
Broadband and Landline	47	41	37	49	50	57	49
Broadband, Landline and TV	33	16	36	33	35	32	35
Broadband and TV	11	34	20	12	7	3	2
Broadband, Landline and Mobile Phone	5	7	5	3	4	6	4
Landline and TV	1	0	0	0	1	1	7
Broadband and Mobile Phone	1	2	2	1	3	0	0
Landline, TV, Broadband and Mobile Phone	1	0	1	2	0	1	1

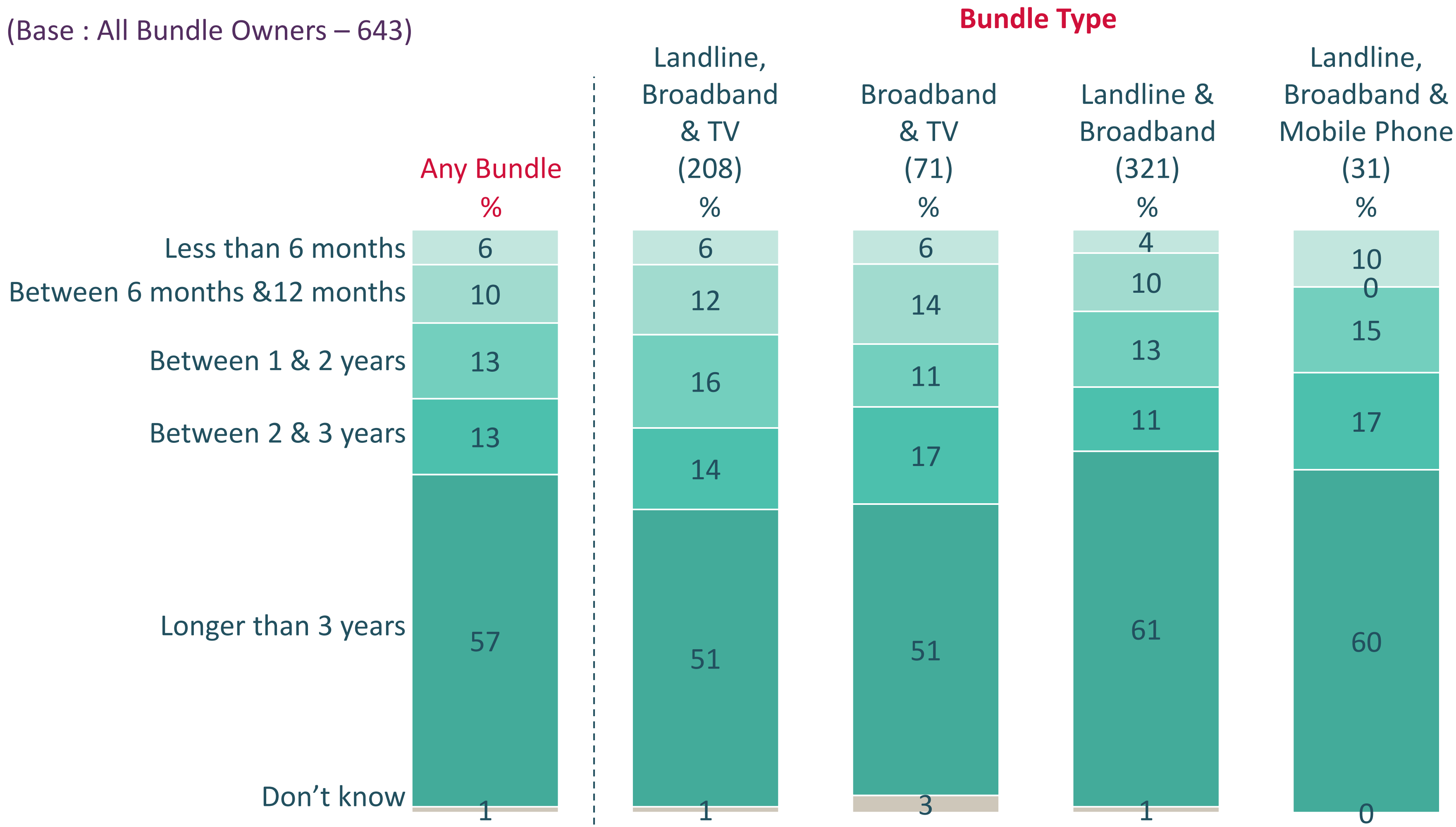
(* small base)

Broadband and Landline bundle is most popular among 55-64 year olds while 36% of bundle owners aged 25-34 subscribe to a broadband/landline and TV bundle.

(Q13a/ai)

Length of time subscribed to a bundle

(Base : All Bundle Owners – 643)



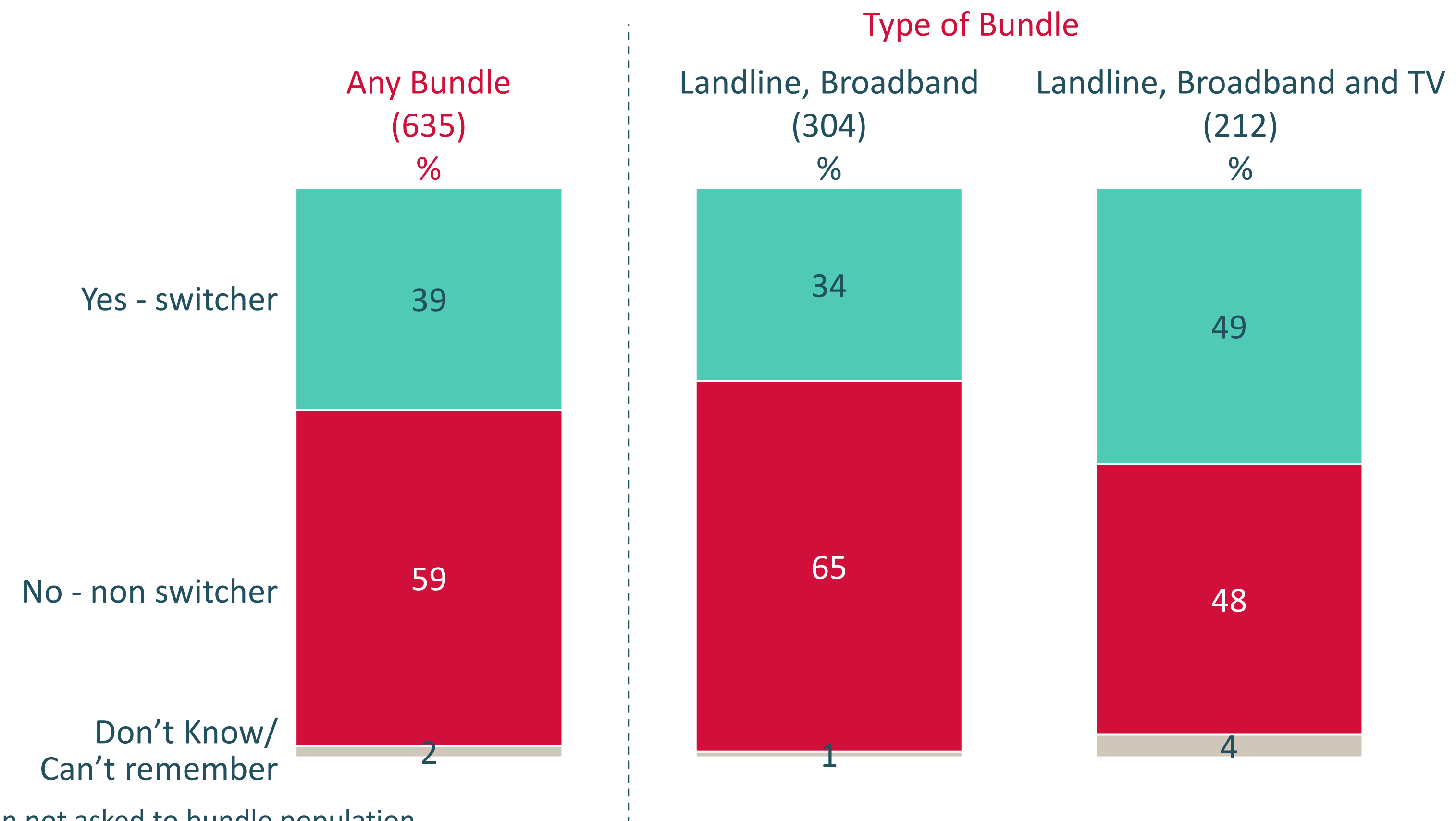
*2013 question not asked to bundle population

57% of bundle purchasers have subscribed to their service for more than 3 years.

Incidence of switching telecommunication service provider

(Base: ALL Consumers who Bundle and Know Service Provider - 635)

Q.14d When you subscribed to (bundle type) did you move from one service provider to another to avail of this bundle?



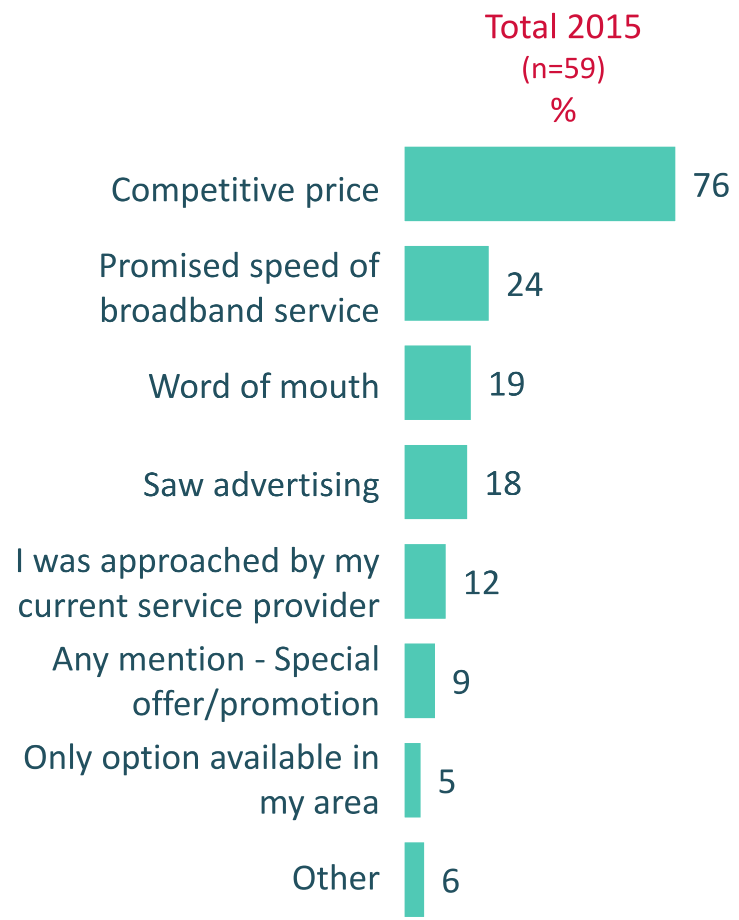
2013 question not asked to bundle population
Other bundle types – base too small to show

(Q14d)

39% of bundle purchasers changed providers in order to avail of bundled services, with switching higher for those who currently have a Landline, Broadband and TV bundle.

Reasons for switching – (switchers in the past 12 months only)

(Base : All Bundle Owners Who Switched Service Provider In The Past Year – 59)



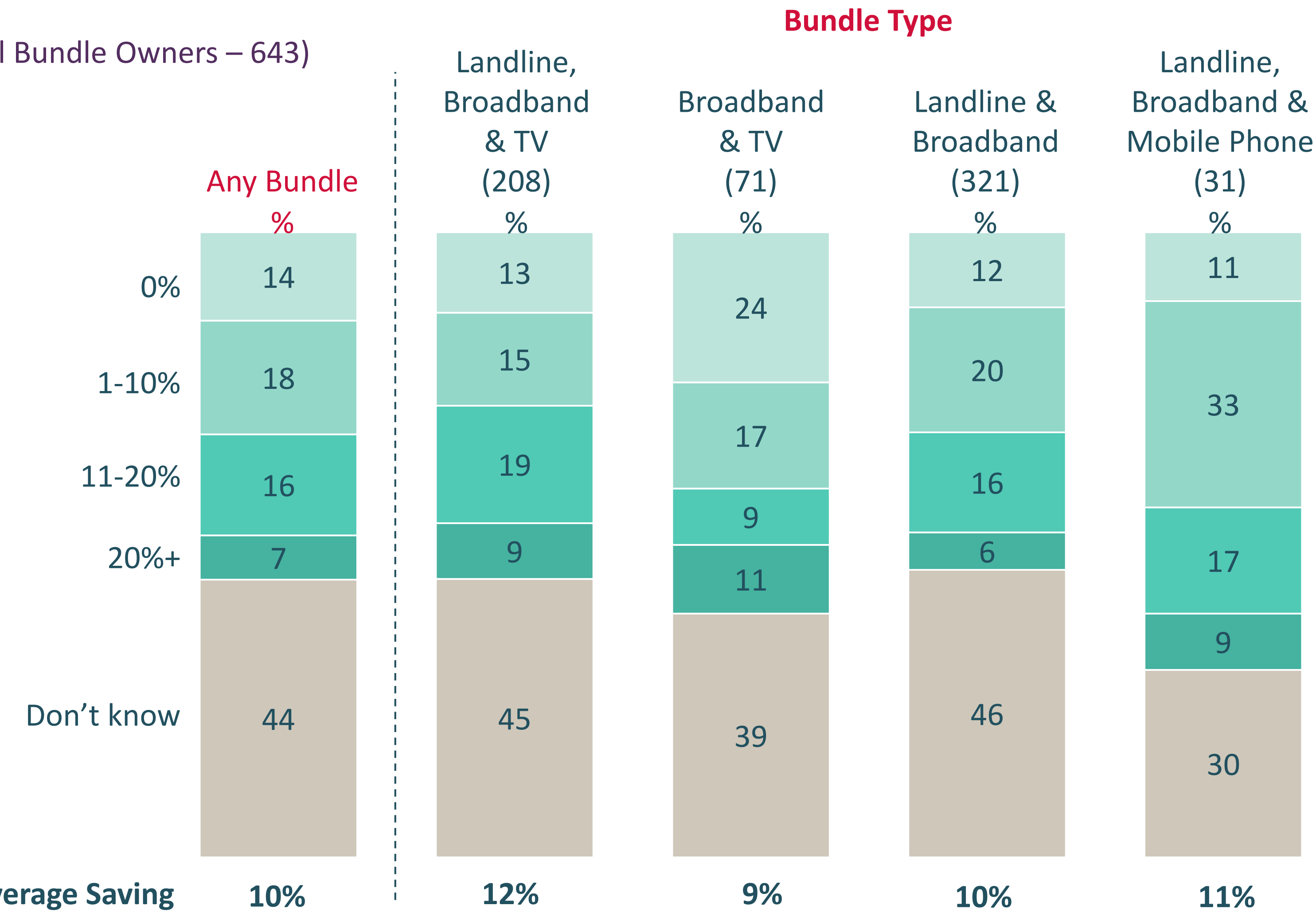
*Other includes - Part of bundled offer, is a brand I trust , good customer service, and No hidden charges

Price is the most common reason for switching followed by broadband speed, word of mouth, and advertising.

(Q 15)

Perceived percentage savings on monthly bill if the best deal was obtained

(Base : All Bundle Owners – 643)

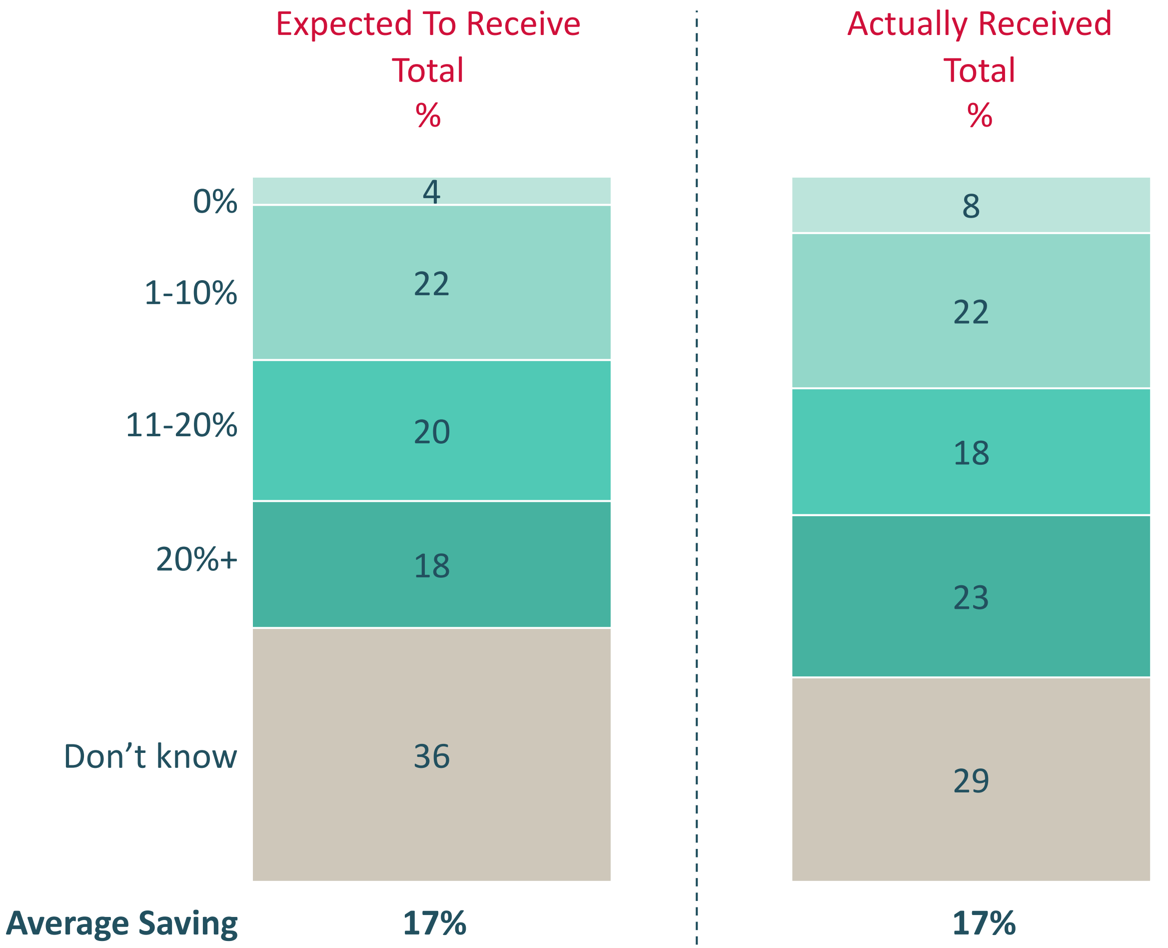


* Other bundles too small to show

14% of bundle users do not think they would save money if they looked for the best deal. This sentiment is particularly strong amongst Broadband & TV bundle users.

Expected v actual savings received when switching service provider (switchers in the past 12 months Only)

(Base : All Bundle Owners Who Switched Service Provider In The Past Year – 59)



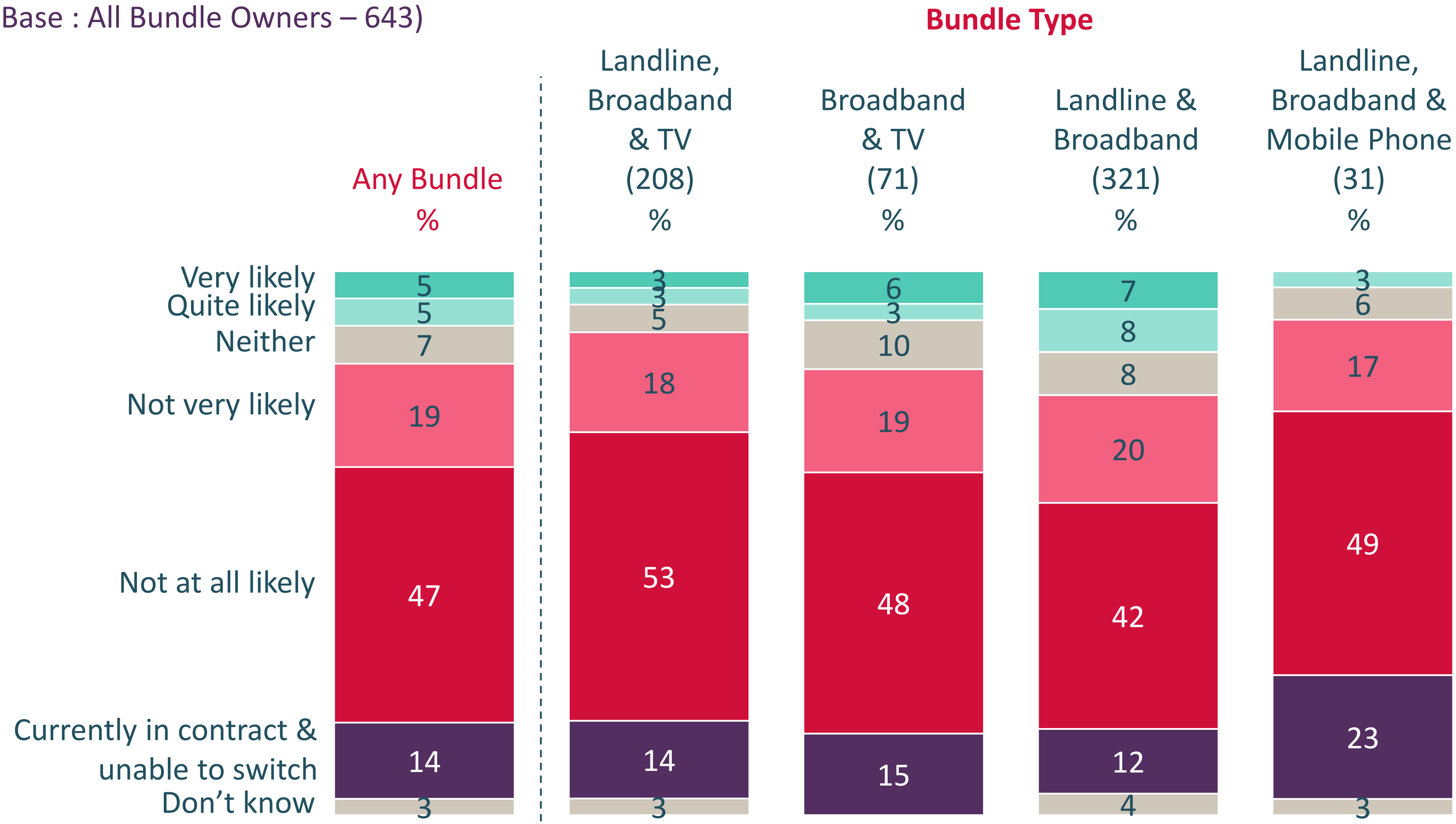
* Bundles base too small to show

Expected savings and actual savings received are broadly similar

(Q16b/c)

Likelihood to switch service provider within the next 12 months

(Base : All Bundle Owners – 643)



* Other bundles too small to show
*2013 question not asked to bundle people

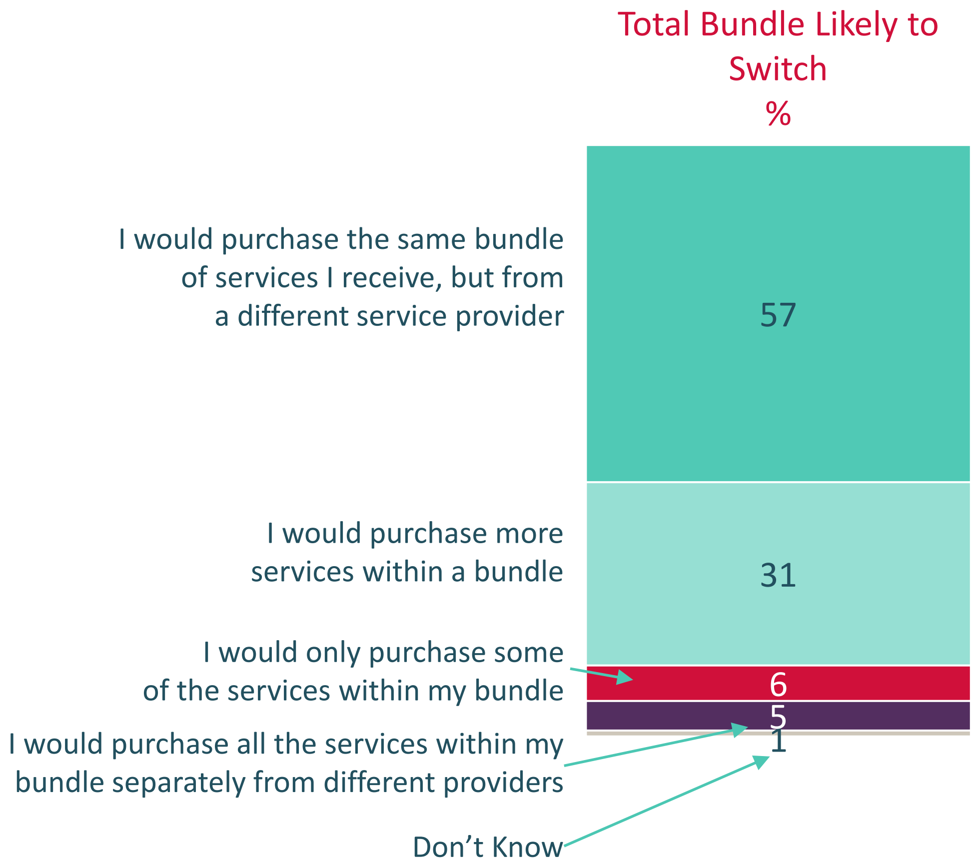
10% of all respondents purchasing bundled telecommunication services are likely to switch their service provider within the next 12 months.

(Q.17)

Action most likely to take if you switch provider

(Base : All Bundle Owners Who Are Likely To Switch Within the Next 12 Months – 66)

Q.18 Which of the following best describe what you are most likely to do if you switch service provider?



* Other bundles too small to show

*2013 question not asked to bundle owners

57% of bundle owners intending to switch are likely to purchase the same bundle of services, but from a different service provider.

Home Landline Telephone Service

Main landline service provider

(Base: All Landline Subscribers - 697)

	Total 2015 (697) %	Total 2013 (692) %	Area: Dublin (224) %	Area: Total Urban (477) %	Area: Urban Less Dublin (254) %	Area: Rural (227) %	Social Class: ABC1 (316) %	Social Class: C2DEF (383) %
Eircom	46	56	27	36	44	67	42	50
UPC	23	18	54	34	15	2	29	19
Vodafone at Home	17	16	8	16	24	20	16	18
Sky Talk	11	0	9	12	14	9	11	11
Others	3	10	3	2	2	1	3	2

46% of landline subscribers purchase landline service from eircom compared to 56% in 2013. UPC has gained 5% since 2013 with the majority of its subscribers based in Dublin. 11% of landline subscribers purchase landline service from Sky.

Main landline service provider

(Base: All Landline Subscribers - 697)

	Total 2015 (697) %	Total 2013 (692) %	Age: 18-24 (33*) %	25-34 (117) %	35-44 (123) %	45-54 (158) %	55-64 (112) %	65+ (156) %
Eircom	46	56	55	34	43	42	48	59
UPC	23	18	28	24	27	21	22	22
Vodafone at Home	17	16	9	18	19	21	20	13
Sky Talk	11	0	8	22	8	13	9	4
Others	3	10	0	1	3	3	1	1

Eircom is the most commonly used provider among 65+ year old's with 59% of subscribers purchasing services from eircom within this age bracket.

(Q 5)

Use of landline service- I

(Base : All Landline Subscribers – 697)

	Total 2015 %	Total 2013 %	Gender: Male %	Gender: Female %	Age: 18-24 %	Age: 25-34 %	Age: 35-44 %	Age: 45-54 %	Age: 55-64 %	Age: 65+ %	Social Class: ABC1 %	Social Class: C2DEF %
To make calls	81	87	83	80	69	66	71	81	90	97	79	83
To receive calls	80	65	83	77	67	66	70	85	87	89	78	81
I keep it because I have to have it to allow me to access a broadband service	35	19	33	37	52	49	44	33	29	21	34	36
Is required for my alarm monitoring system to work	8	2	9	7	0	6	8	10	9	10	9	8
I just have it for security	6	3	5	6	6	6	2	7	6	8	7	5
While I have the landline it is not used at all	4	2	4	5	8	9	6	3	3	1	4	5

81% use their landline to make calls with 80% using landline to receive calls, with lowest use among the 18-24 and 25-34 cohorts. 35% have landline to facilitate operation of broadband service.

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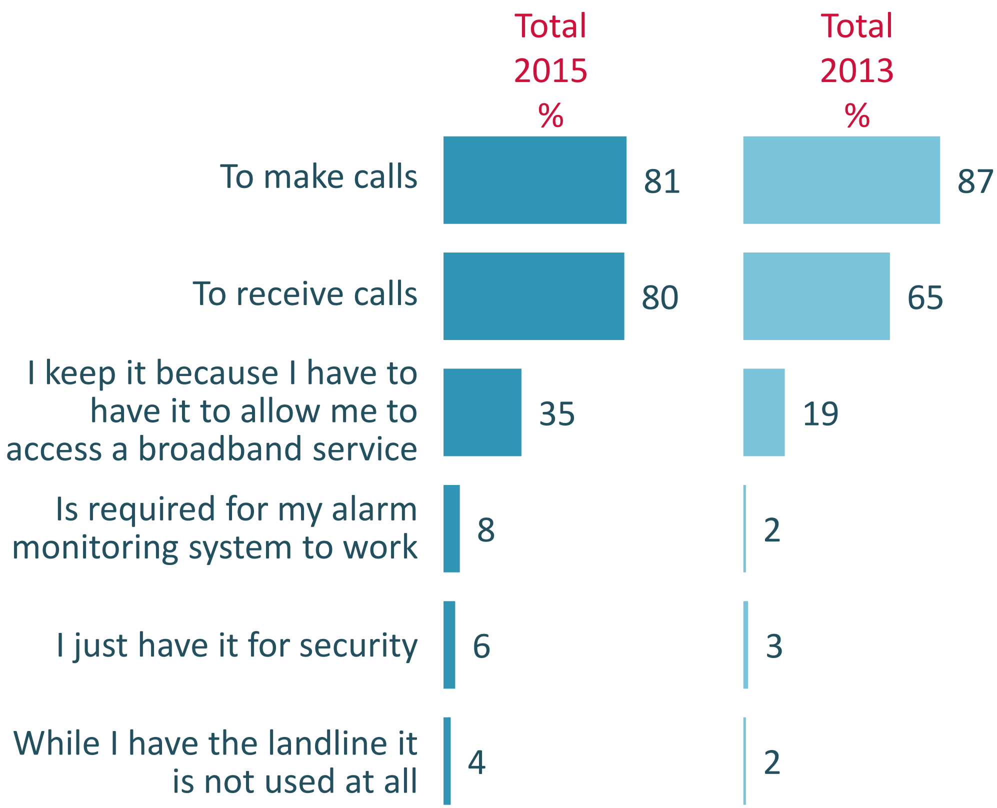
(Q 19)

Use of landline service - II

(Base : All Landline Subscribers – 697)

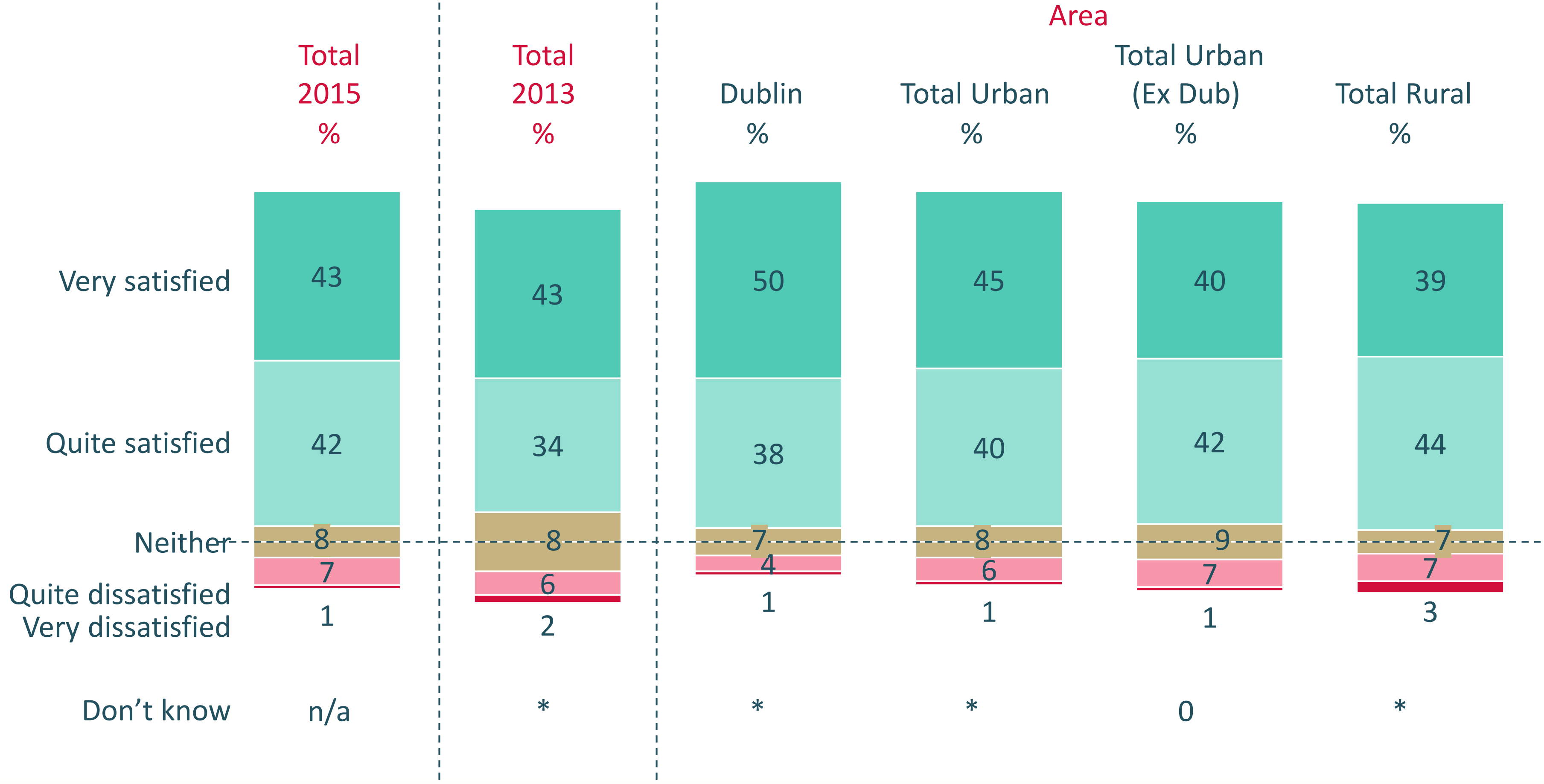


Area			
Dublin %	Total Urban %	Total Urban (Ex Dub) %	Total Rural %
82	78	75	87
84	79	74	81
19	29	38	48
6	9	12	7
2	4	6	9
4	5	6	3

48% of respondents in rural Ireland keep landline in order to access broadband service

Satisfaction with landline service - I

Base : All Landline Subscribers - 697

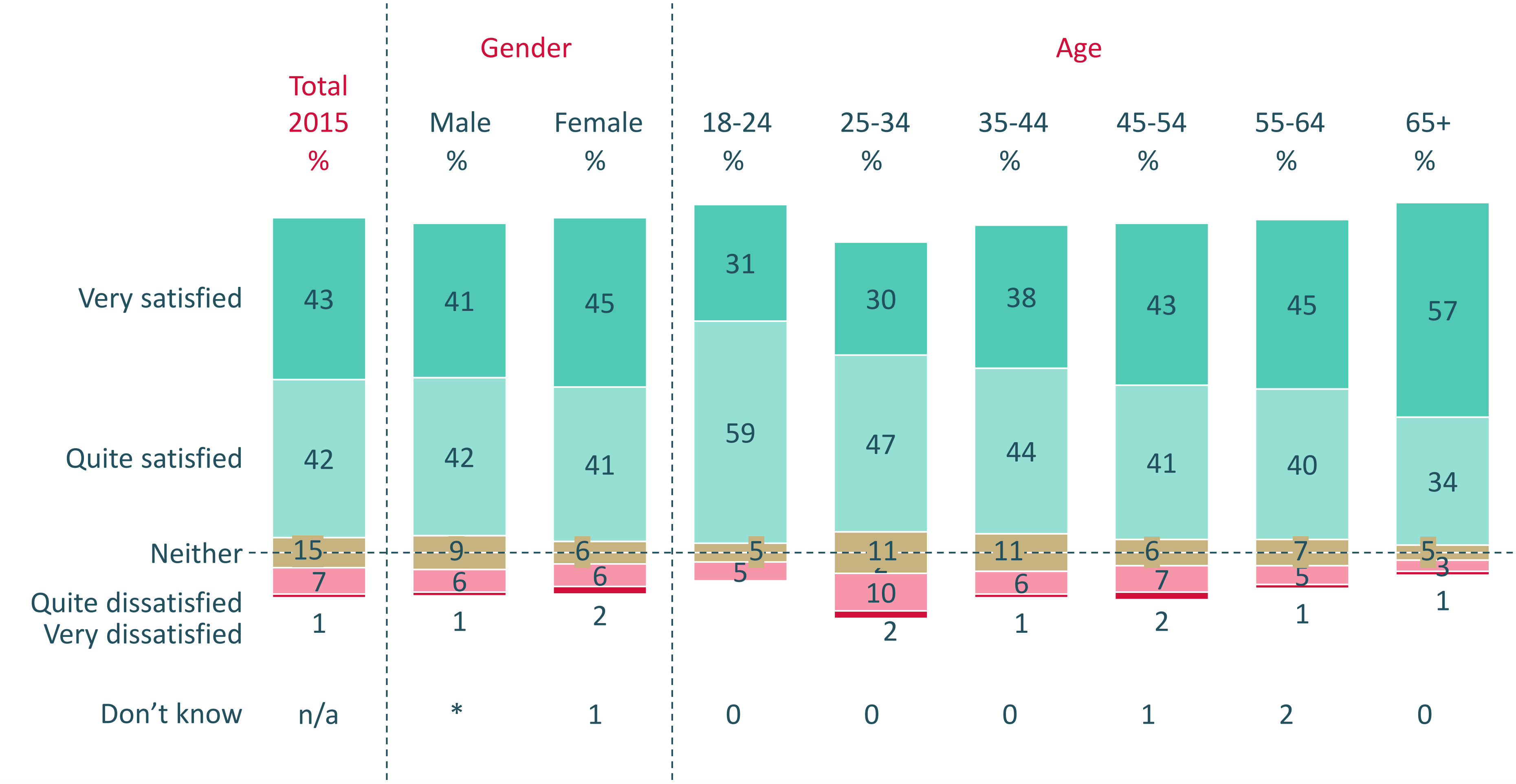


Satisfaction with Landline Service Provider has increased from 77% (in 2013) to 85% (in 2015)

(Q 20a)

Satisfaction with landline service - II

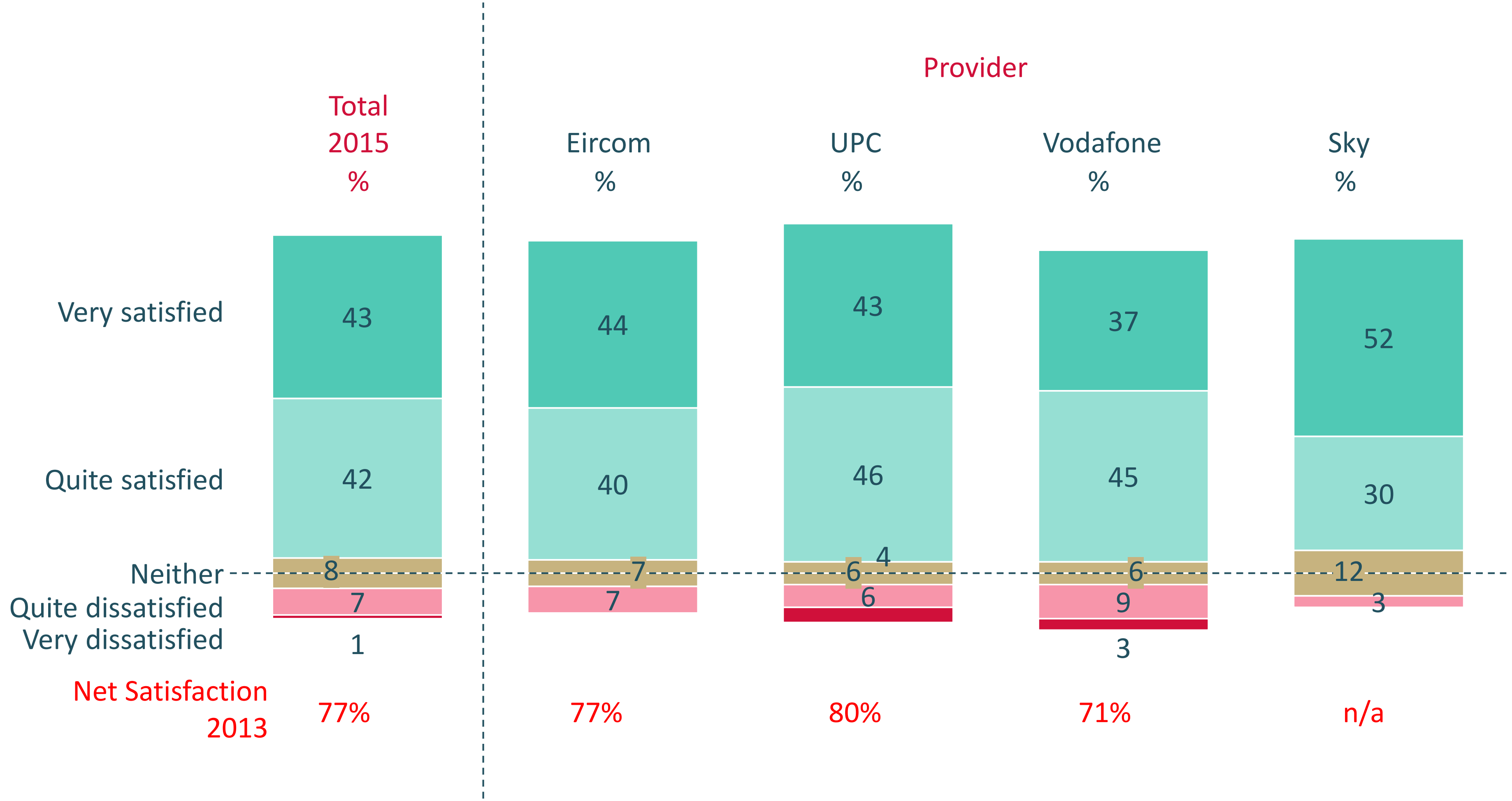
Base : All Landline Subscribers - 697



Satisfaction with landline service rises with age from a low of 77% among 25-34 year old’s to 91% among 65+ year old’s

Satisfaction with landline service – III

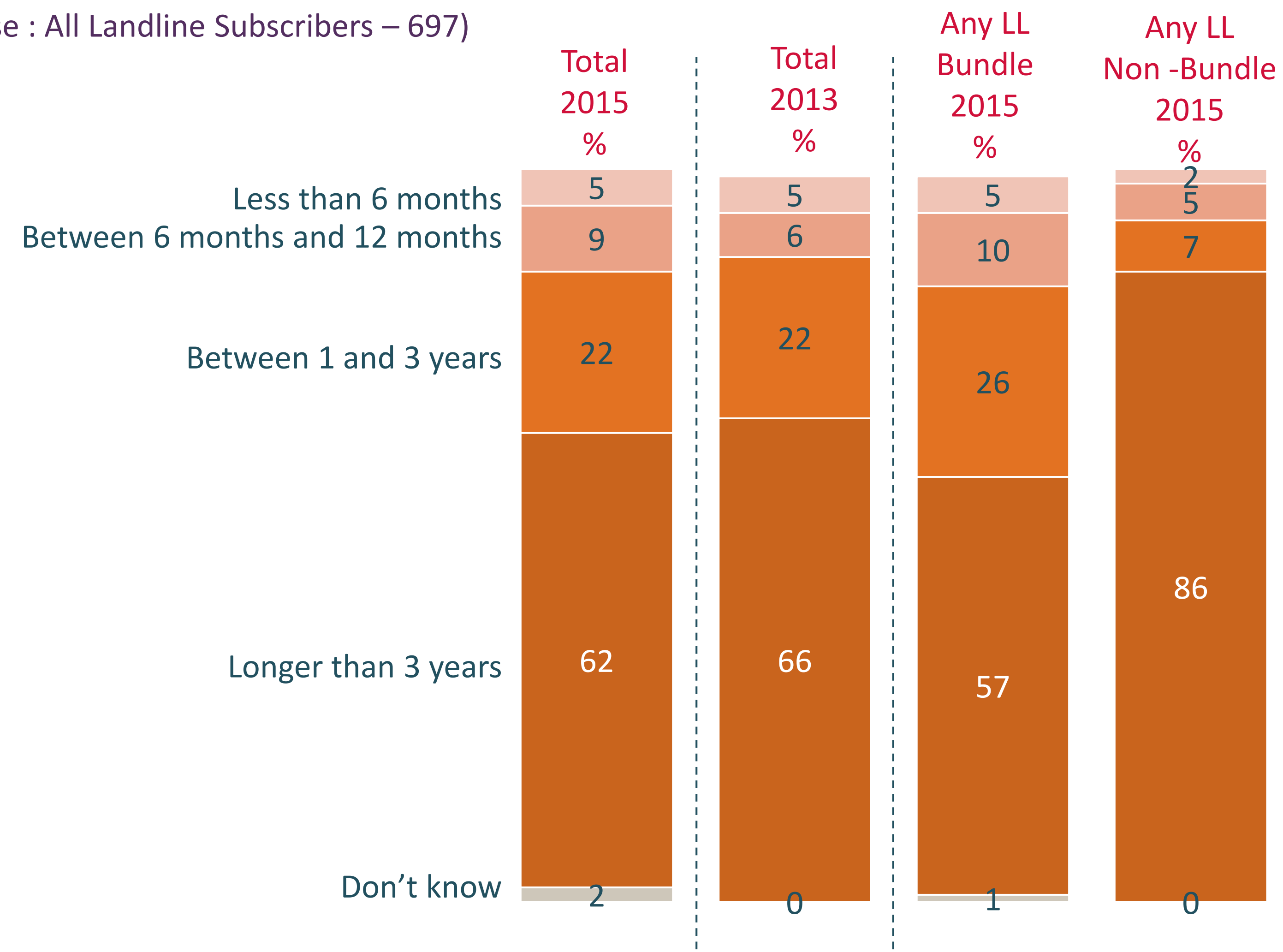
Base : All Landline Subscribers - 697



The level of satisfaction is similar across landline service providers with Sky having a higher share of very satisfied subscribers compared to other landline service providers.

Length of time subscribed to landline service

(Base : All Landline Subscribers – 697)



62% of all landline subscribers have been with their current provider for longer than 3 years – this figure rises to 86% among respondents purchasing standalone landline service

(Q23)

Length of time subscribed to landline service

(Base : All Landline Subscribers – 697)

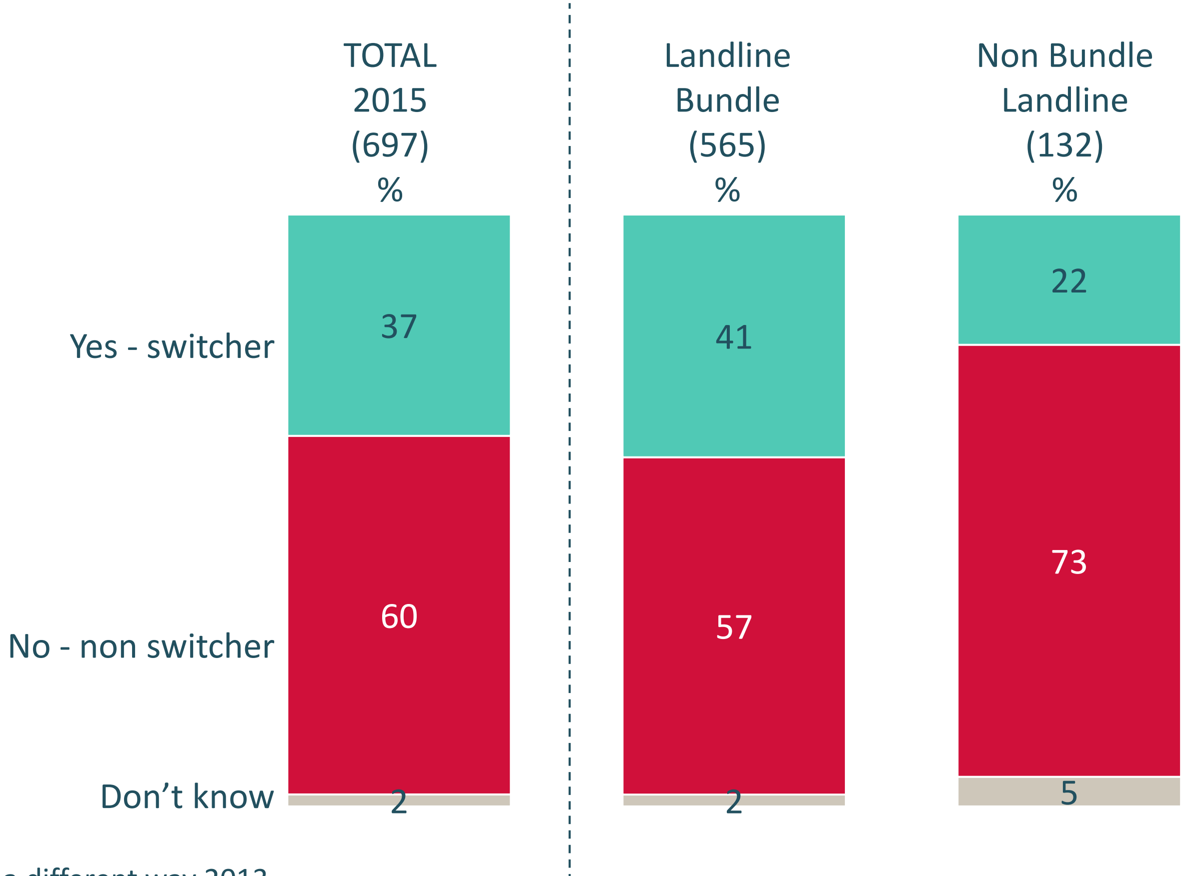
	Total 2015	Age						Social Class	
	%	18-24 %	25-34 %	35-44 %	45-54 %	55-64 %	65+ %	ABC1 %	C2DEF %
Less than 6 months	5	2	8	10	3	2	5	6	4
Between 6 months and 12 months	9	12	14	9	10	7	5	8	10
Between 1 and 3 years	22	19	30	27	23	19	14	26	20
Longer than 3 years	62	64	46	53	64	69	75	61	64
Don't know	2	2	2	1	0	3	2	1	2

Those aged 65+ are most likely to have subscribed to the landline service for longer than 3 years (75%).

(Q23)

Have you previously purchase landline service from a different service provider?

(Base: All Landline Subscribers - 697)



Switching questions asked in a different way 2013

37% of all respondents purchasing landline service have switched their service provider with this figure decreasing to 22% among respondents purchasing standalone landline service.

(Q24a)

Have you previously purchase landline service from a different service provider?

(Base: All Landline Subscribers - 697)

	TOTAL 2015 (697)	Age						Social Class	
		18-24	25-34	35-44	45-54	55-64	65+	ABC1	C2DEF
	%	%	%	%	%	%	%	%	%
Yes - switcher	37	28	39	46	39	36	29	40	35
No - non switcher	60	63	58	52	58	63	69	56	64
Don't know	2	9	3	2	2	2	2	4	1

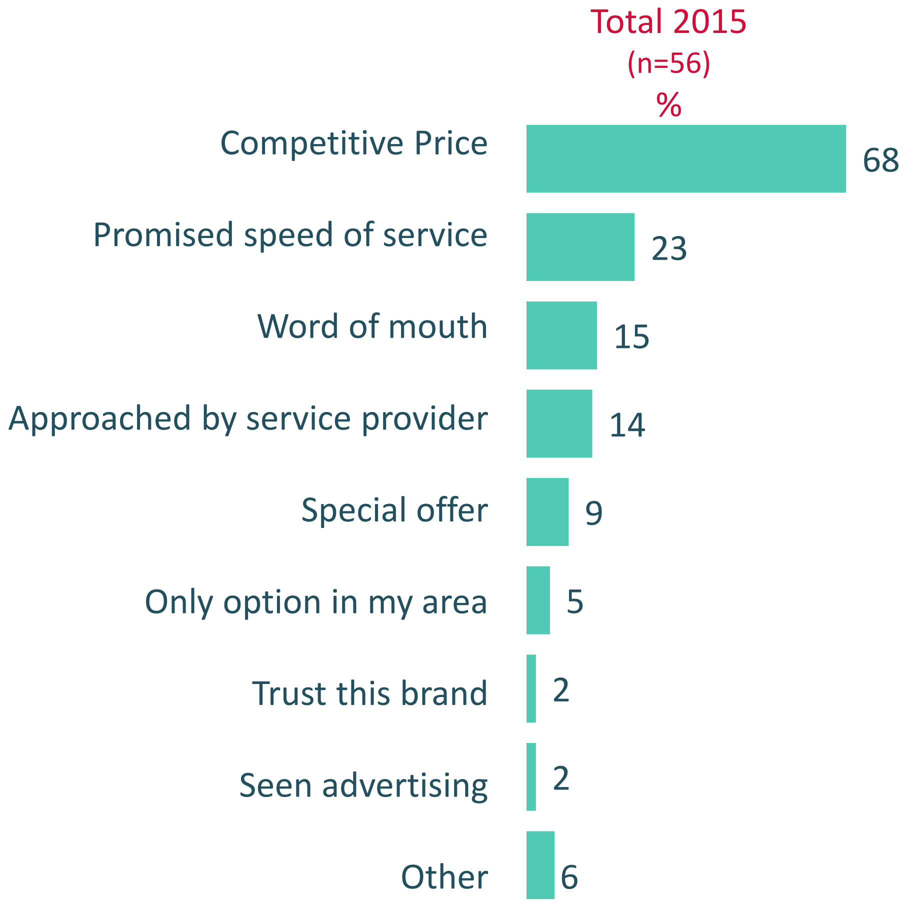
Switching questions asked in a different way 2013

Incidence of switching provider is lowest among those aged 65+ (29%).

(Q24a)

Why did you switch your landline provider? (switchers in the past 12 months only)

(Base : All Landline Service Subscribers Who Switched Provider in the Past 12 months – 56)

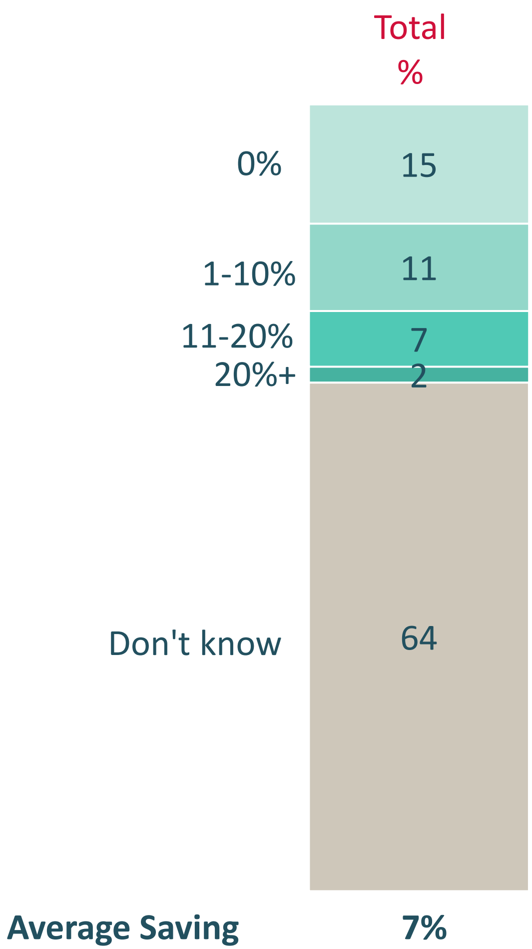


Price is the main reason for switching.

(Q.24b)

Perceived percentage savings on monthly bill if the best deal was obtained

(Base : All Non Bundle Landline Subscribers – 132)



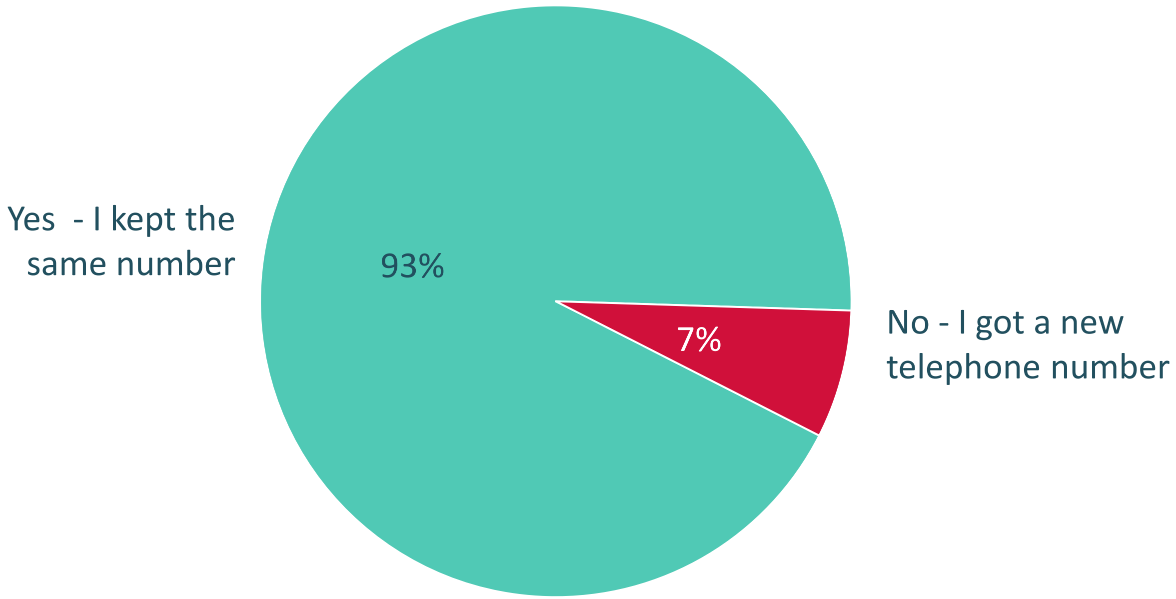
(Base : Expect and Actual savings too small to show)

15% of landline subscribers do not expect to save any money by looking for the best deal.

(Q.22)

Telephone number retention when switching landline provider

(Base : All Landline Service Subscribers Who Switched Provider – 260)

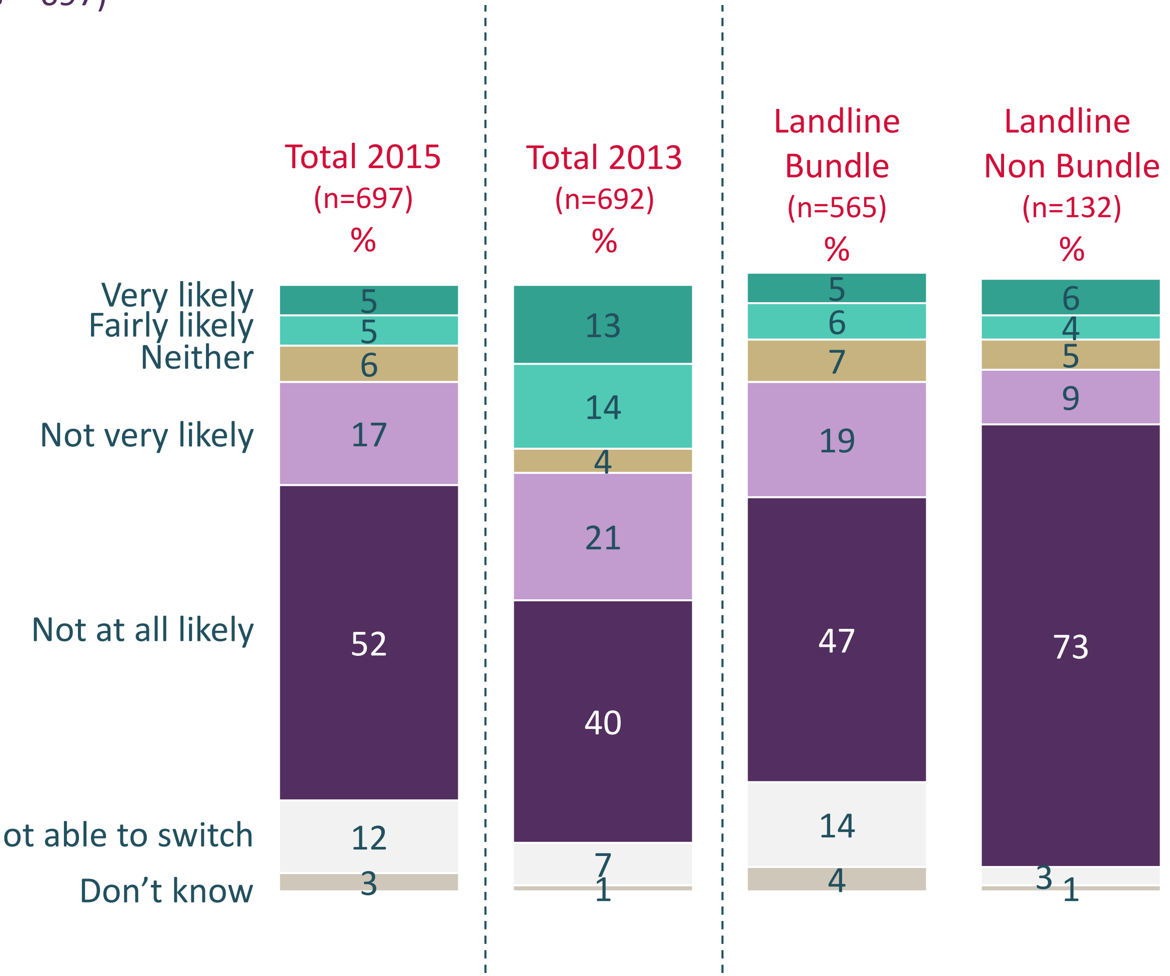


93% of respondents who switched landline service provider in the past stated that they kept the same telephone number when switching while 7% got a new number.

(q.27)

Likelihood to switch landline service provider within the next 12 months

(Base : All Landline Subscribers – 697)



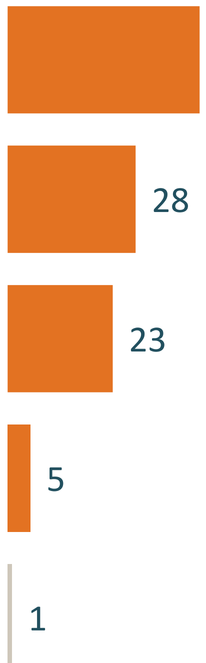
There is a significant decrease in likelihood to switch landline service provider since 2013 (10% in 2015 versus 27% in 2013).

(Q29a)

Mobile Phone

Main mobile phone service provider

(Base: All Mobile Phone Subscribers – 1,005)



	Total 2015 %	Total 2013 (975) %	Area -2015: Dublin (285) %	Total Urban (647) %	Urban Less Dublin (362) %	Rural (358) %
Vodafone	42	40	38	38	38	50
Three Group	28	33	29	30	30	25
Eircom Group Mobile	23	24	29	26	24	19
Tesco Mobile	5	0	3	5	6	5
Other	1	4	1	1	1	1

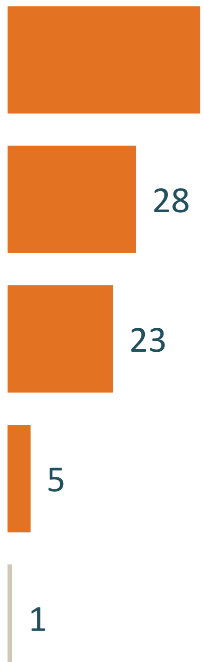
(Note : For the purpose of better comparisons, Three and O2 shares in 2013 were combined)

The majority of respondents purchase mobile phone service from Vodafone (42%) followed by Three (28%) and Eircom Group Mobile (23%).

(Q 6a)

Main mobile phone service provider

(Base: All Mobile Phone Subscribers – 1,005)



	Total 2015 %	Total 2013 (975) %	Age -2015: 18-24 %	25-34 %	35-44 %	45-54 %	55-64 %	65+ %	Social Class: ABC1 %	C2DEF %
Vodafone	42	40	22	37	43	45	46	51	43	42
Three Group	28	33	28	33	29	27	26	24	32	25
Eircom Group Mobile	23	24	42	26	22	23	20	21	19	27
Tesco Mobile	5	0	2	2	5	6	9	4	5	5
Other	1	4	7	1	1	1	0	0	0	0

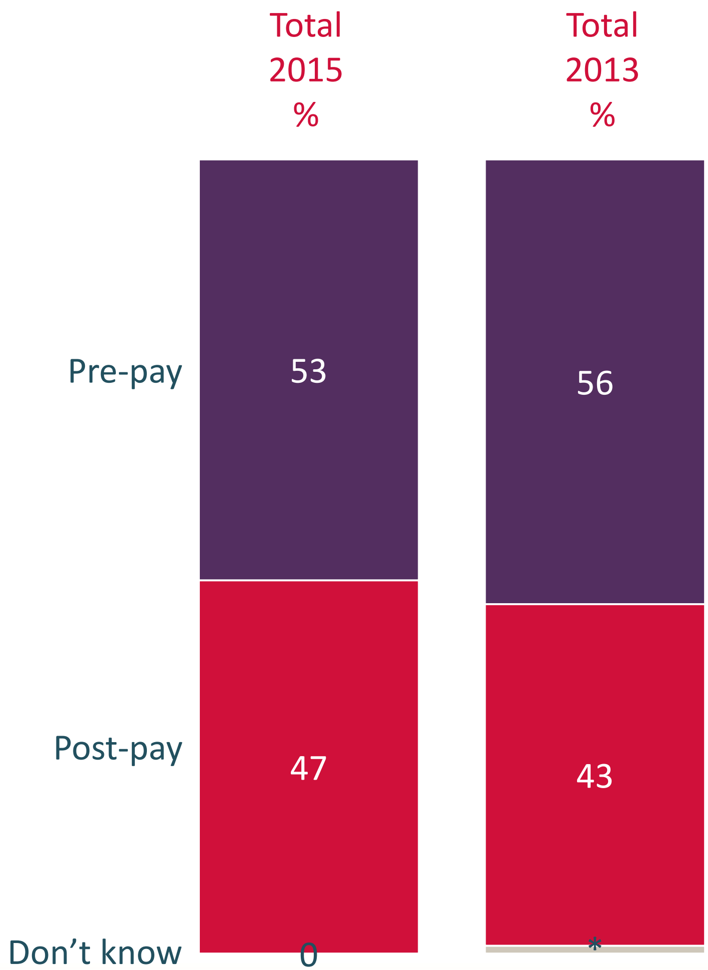
(Note : For the purpose of better comparisons, Three and O2 shares in 2013 were combined)

Eircom Group Mobile's share is significantly higher among 18-24 year olds (42%) while Vodafone's share is higher among 65+ (51%)

(Q 6a/b)

Pre-pay vs Post-Pay

(Base : All Mobile Phone Subscribers – 1005)



Gender		Age						Social Class	
Male %	Female %	18-24 %	25-34 %	35-44 %	45-54 %	55-64 %	65+ %	ABC1 %	C2DEF %
49	57	71	49	37	50	56	71	40	62
50	43	29	50	63	50	43	29	59	38
1	0	0	*	*	*	1	0	1	0

Increase in the number of respondents purchasing post-pay mobile phone services (43% in 2013 to 47% in 2015) with 18-24 year olds the least likely to have a post-pay mobile phone service and 35-44 year olds the most likely to be in a contract.

(Q.35)

Use of mobile phone - I

(Base : All Mobile Phone Subscribers – 1005)

	Total %	Gender: Male %	Gender: Female %	Age: 18-24 %	Age: 25-34 %	Age: 35-44 %	Age: 45-54 %	Age: 55-64 %	Age: 65+ %	Social Class: ABC1 %	Social Class: C2DEF %
To make/receive calls domestically	98	99	98	99	98	99	98	99	98	99	98
To make/receive traditional text messages i.e. SMS	76	69	81	84	82	84	79	68	53	81	71
Browsing the Internet	58	57	59	83	80	73	57	33	17	67	51
Send/receive email	47	46	48	73	66	64	41	23	16	58	39
To use Social Media (e.g. Facebook, Twitter, Instagram, Pinterest)	45	42	49	84	72	56	40	19	7	51	41
To make calls to and from abroad	36	38	35	35	42	32	45	34	26	41	33
Instant Messaging on Facebook	30	26	33	66	48	37	25	8	2	32	28
Use mobile apps	29	27	31	56	46	39	23	9	3	38	23
Instant messaging on Viber	25	21	30	48	40	35	21	10	2	33	20
Shop Online	22	18	26	44	35	30	18	8	2	29	17
Instant messaging on WhatsApp	22	20	24	47	34	27	20	8	2	27	18
Instant messaging on Snap Chat	13	11	15	49	24	11	7	3	1	14	13
Download/Stream Music	12	12	12	35	20	15	7	4	1	15	10
Download/Stream Video	10	11	10	22	19	14	6	4	1	14	8
Use VoiP (e.g. Skype) services	9	8	11	20	16	10	8	4	1	13	7
Other	*	1	0	0	1	1	0	0	0	*	*

Mobile phones are most likely used for making/receiving calls domestically (98%), making/receiving SMS (76%) and browsing the Internet (58%). 45% access social media services on their phone.

(Q.30)

Use of mobile phone - II

(Base : All Mobile Phone Subscribers – 1005)

	Total %	Payment: Prepay %	Payment: Bill pay %
To make/receive calls domestically	98	98	99
To make/receive traditional text messages i.e. SMS	76	71	81
Browsing the Internet	58	43	74
Send/receive email	47	32	64
To use Social Media (e.g. Facebook, Twitter, Instagram, Pinterest)	45	37	55
To make calls to and from abroad	36	31	43
Instant Messaging on Facebook	30	24	36
Use mobile apps	29	18	40
Instant messaging on Viber	25	18	34
Shop Online	22	14	32
Instant messaging on WhatsApp	22	14	31
Instant messaging on Snap Chat	13	11	16
Download/Stream Music	12	8	16
Download/Stream Video	10	7	15
Use VoiP (e.g. Skype) services	9	6	13
Other	*	1	0

Significant difference in usage by those with a pre-paid or post-paid mobile phone service subscription.

(Q.30)

Use of mobile phone - III

(Base : All Mobile Phone Subscribers – 1005)

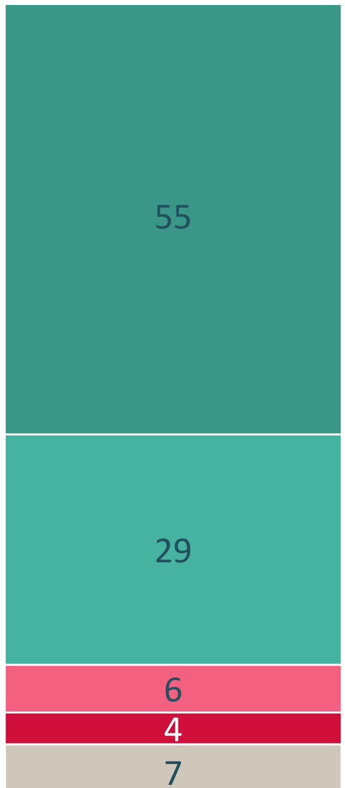
	Total %	Dublin %	Total Urban %	Total Urban (Ex Dub) %	Total Rural %
		Area			
To make/receive calls domestically	98	98	99	99	98
To make/receive traditional text messages i.e. SMS	76	64	76	85	75
Browsing the Internet	58	58	60	61	54
Send/receive email	47	47	49	51	43
To use Social Media (e.g. Facebook, Twitter, Instagram, Pinterest)	45	45	47	48	43
To make calls to and from abroad	36	45	40	36	30
Instant Messaging on Facebook	30	29	31	32	27
Use mobile apps	29	25	30	34	27
Instant messaging on Viber	25	23	27	30	22
Shop Online	22	20	24	27	20
Instant messaging on WhatsApp	22	26	24	23	18
Instant messaging on Snap Chat	13	7	13	19	13
Download/Stream Music	12	12	14	15	9
Download/Stream Video	10	13	12	12	7
Use VoiP (e.g. Skype) services	9	12	11	10	7
Other	*	*	*	*	*

Making/receiving SMS is least common in Dublin.

(Q.30)

Frequency of use of social media/instant messaging

Base : All Mobile Phone Subscribers Who Use Instant Messaging/Social Media – 548)



	Total %	Gender: Male %	Gender: Female %	Age: 18-24 %	Age: 25-34 %	Age: 35-44 %	Age: 45-54 %	Age: 55+ %	Social Class: ABC1 %	Social Class: C2DEF %
Several times per day	55	44	63	72	60	60	38	33	55	54
Several times per week	29	36	23	22	26	29	34	39	28	29
Several times per month	6	7	4	3	5	4	7	11	5	6
Less frequently	4	5	3	1	2	4	10	7	6	3
Never	7	8	6	2	7	3	11	10	6	7

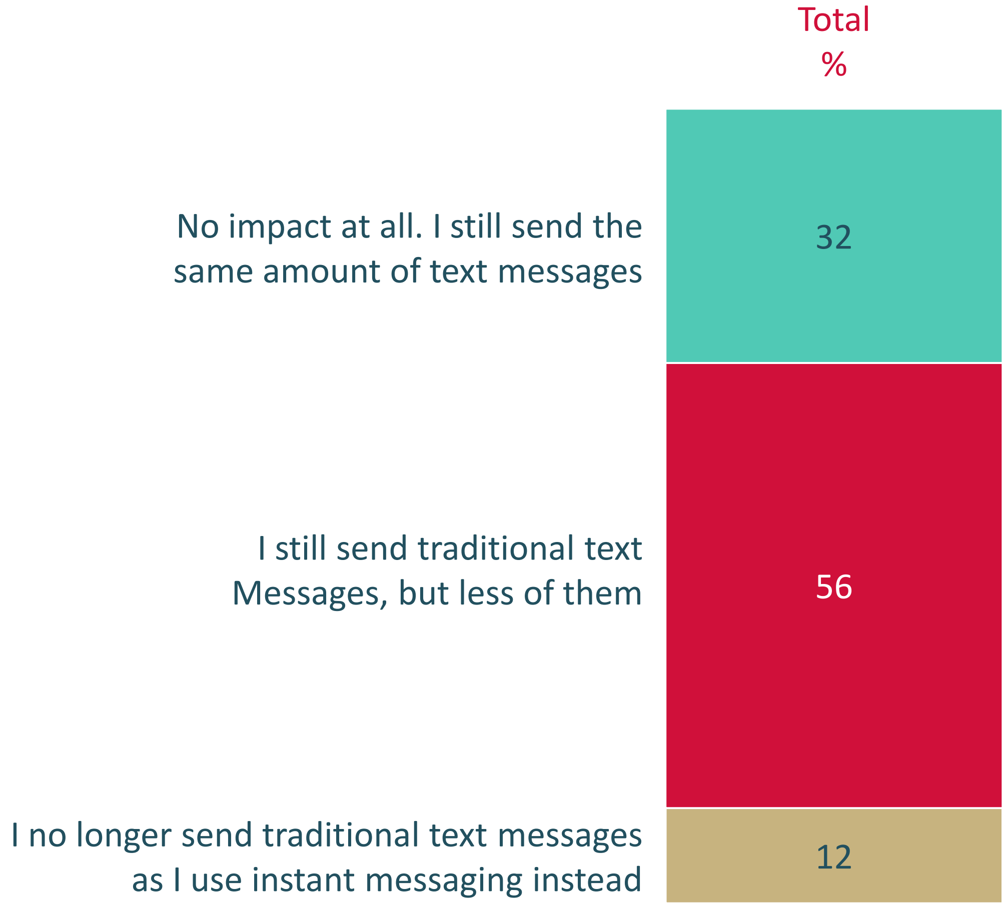
84% of social media users access these services at least several times per week. Social media usage frequency is higher among females and respondents aged 18-24.

(Q.31)

Impact of instant messaging/social media on usage of text messaging

(Base : All Mobile Phone Subscribers Who Use Instant Messaging/Social Media – 512)

Q.32 How has your usage of instant messaging/social media impacted your usage of traditional text messages?



32% of social media users state that they still send the same amount of text messages in spite of the social media usage. 12% claim to have stopped sending text messages altogether.

Incidence of purchasing handsets

(Base : All Mobile Phone Subscribers – 1005)

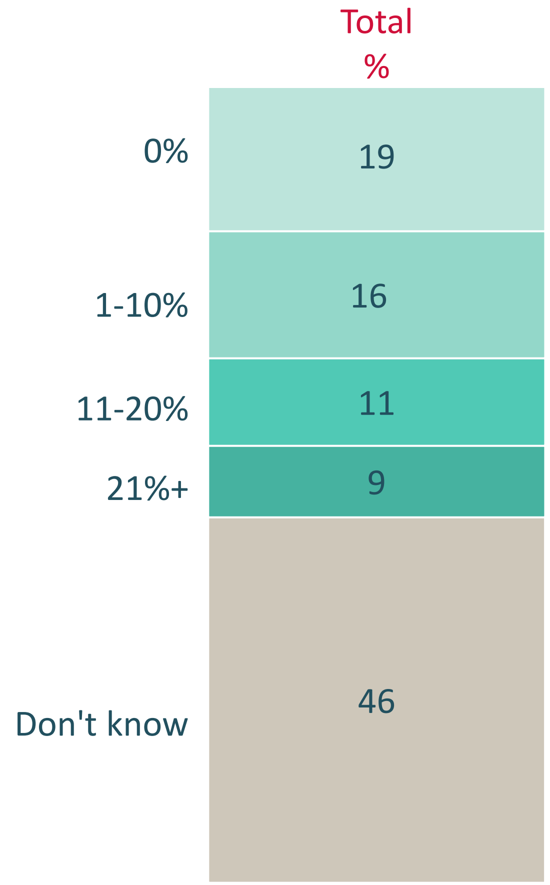
Q.33 Thinking about the last time you subscribed to your mobile phone service which of the following best describes what you did?

	Total	Gender		Age						Social Class	
	%	Male %	Female %	18-24 %	25-34 %	35-44 %	45-54 %	55-64 %	65+ %	ABC1 %	C2DEF %
Purchase SIM only no handset	19	19	20	25	21	19	19	17	16	18	20
Purchase handset	70	71	70	61	71	73	71	70	70	71	70
Don't know	10	10	11	13	7	9	10	13	14	12	10

19% of mobile phone service subscribers purchased a SIM only plan with this figure rising to 25% among 18-24 year olds.

Perceived percentage savings on monthly bill think could receive?

(Base : All Post Pay Mobile Phone Subscribers non bundle – 431)

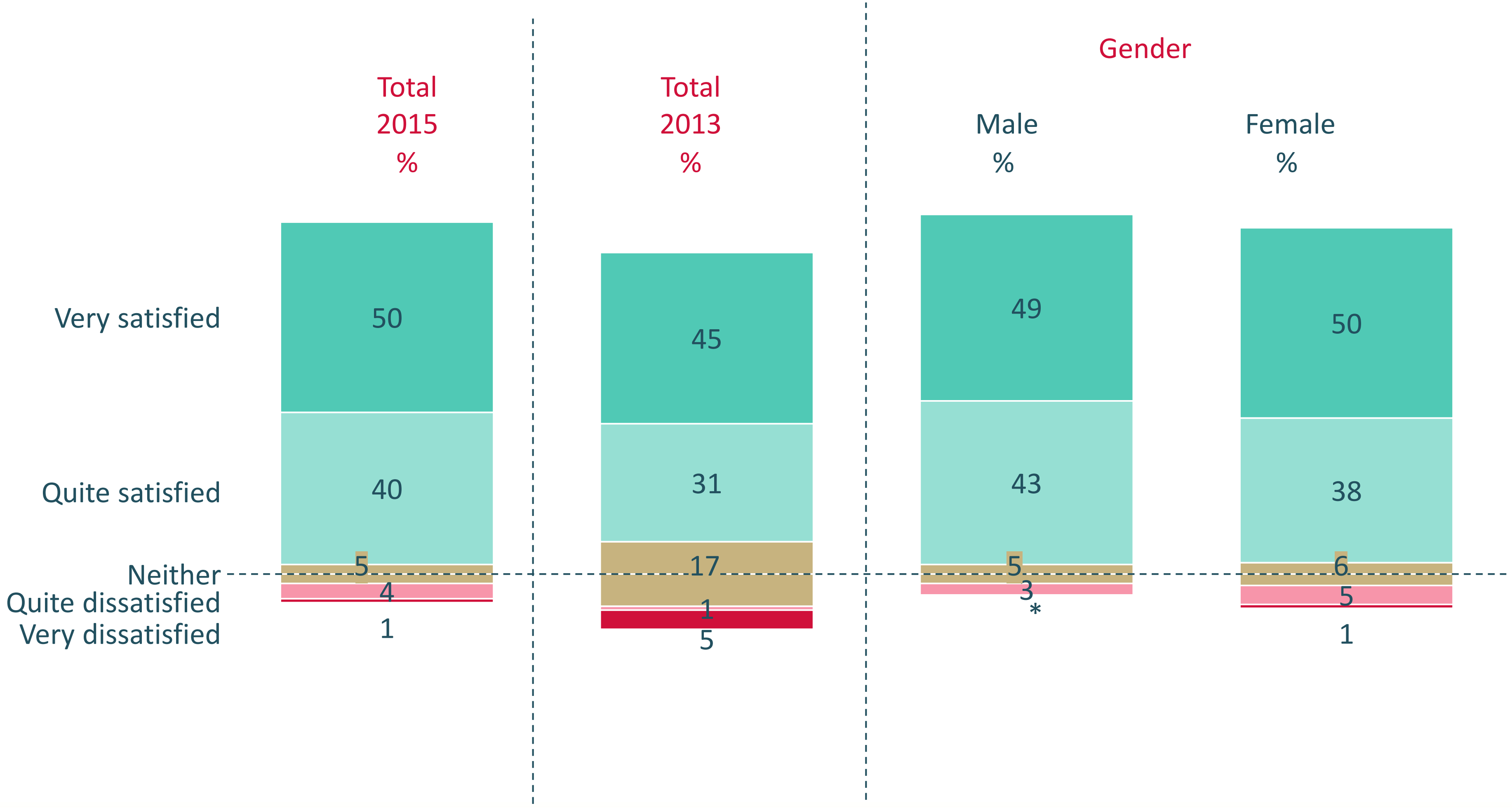


19% of mobile phone users do not expect do receive any savings if they were to look for a better deal.

(Q.37)

Satisfaction with mobile phone service - I

(Base : All Mobile Phone Subscribers – 1005)



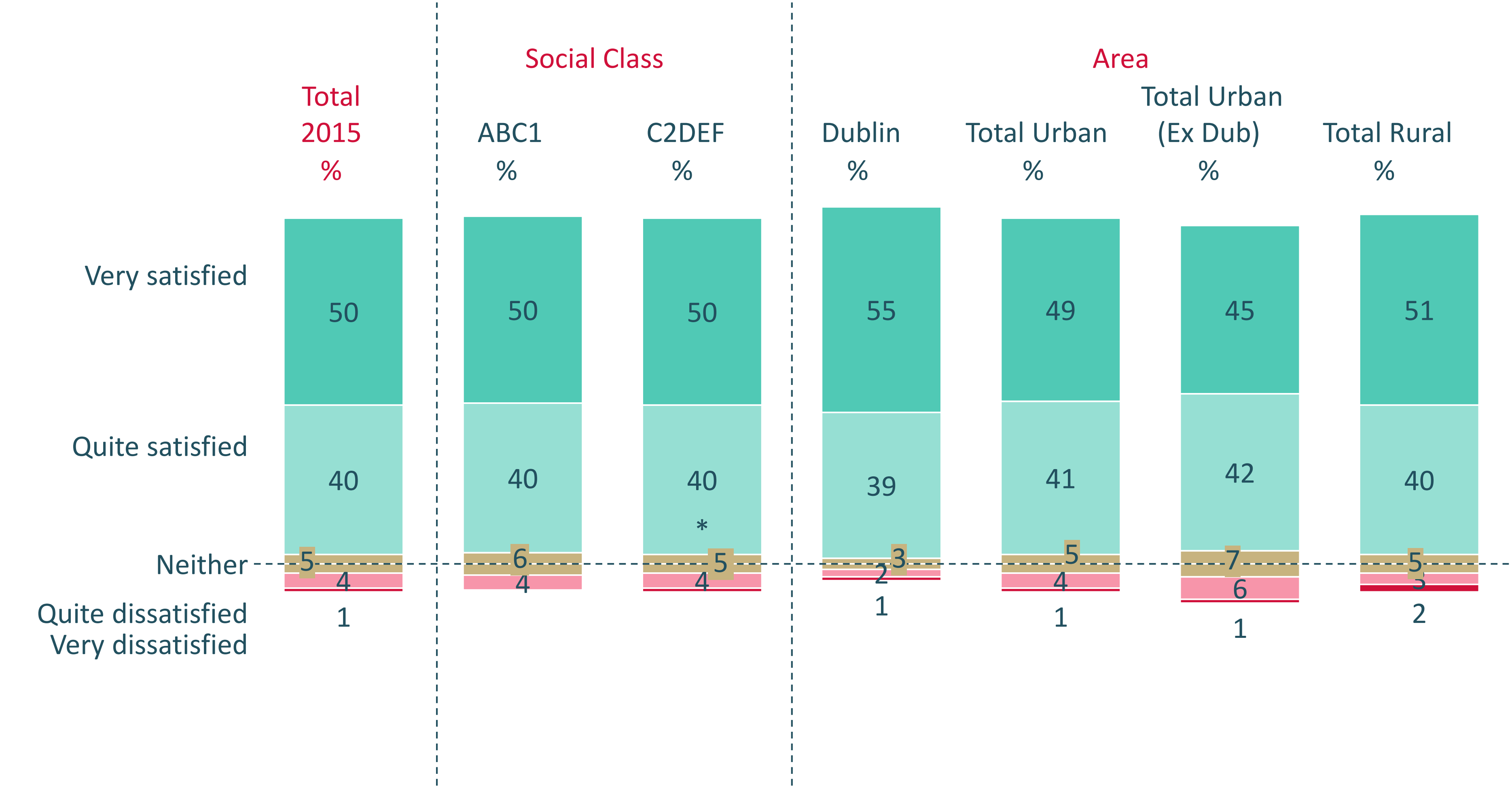
90% of mobile phone users are satisfied with their service (up from 76% in 2013).

REDC

(Q 38)

Satisfaction with mobile phone service - II

(Base : All Mobile Phone Subscribers – 1005)

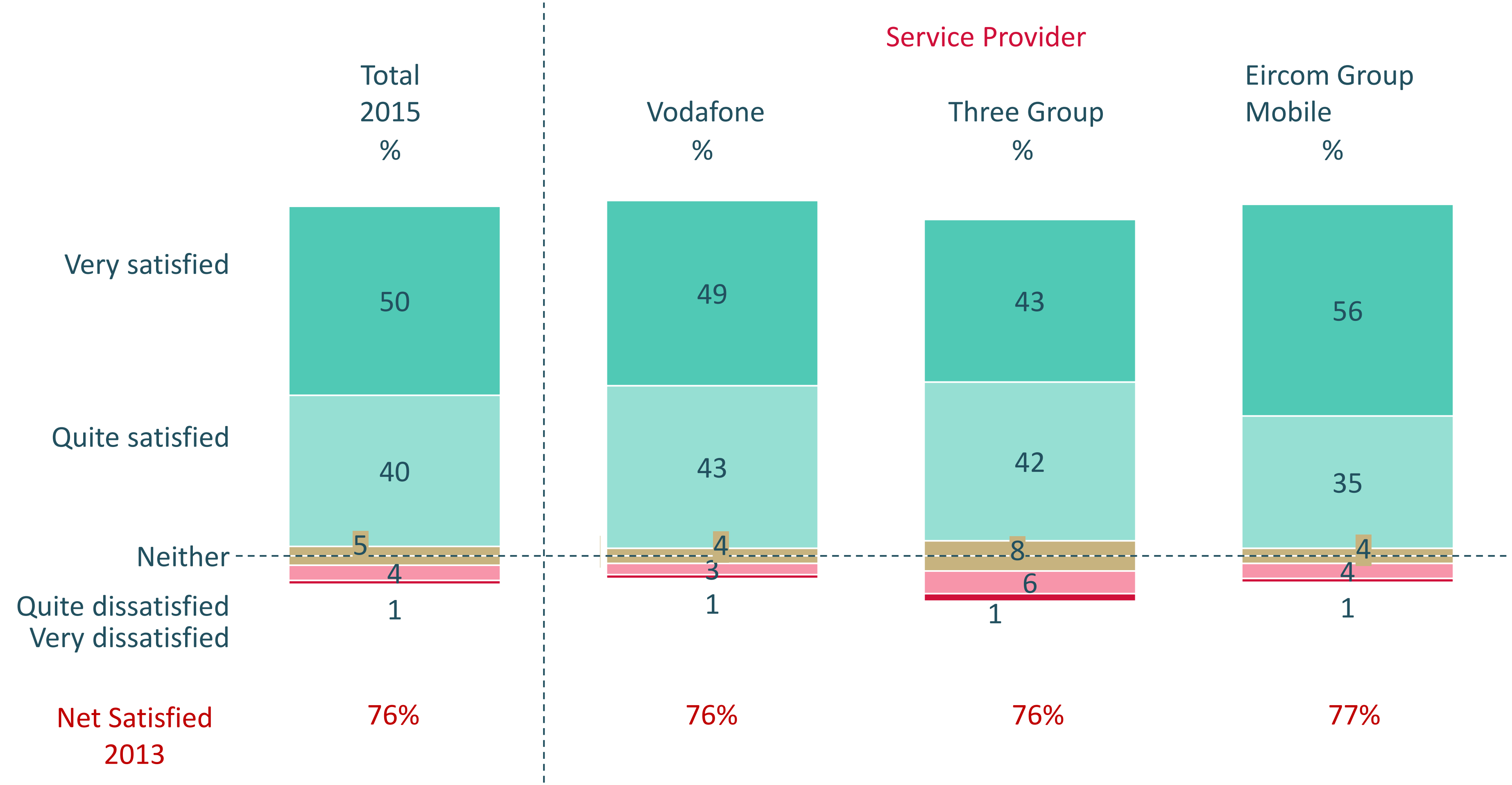


Satisfaction is high overall with Dubliners most satisfied at 94%.

(Q 38)

Satisfaction with mobile phone service - III

(Base : All Mobile Phone Subscribers – 1005)

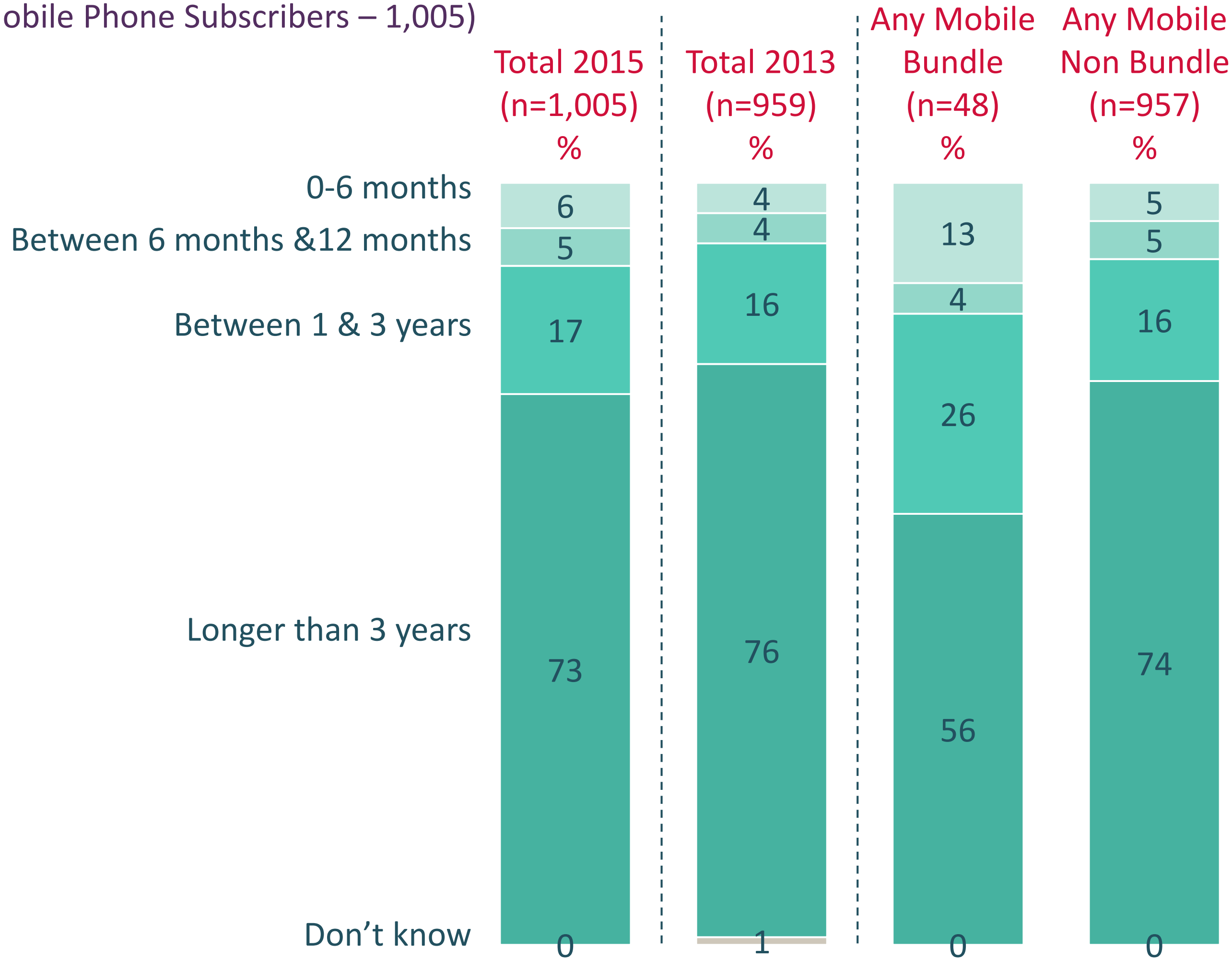


The level of satisfaction is similar across mobile phone service providers with Eircom Group Mobile having a higher share of very satisfied subscribers compared to other mobile phone service providers.

(Q 38)

Length of time subscribed to mobile phone service

(Base : All Mobile Phone Subscribers – 1,005)

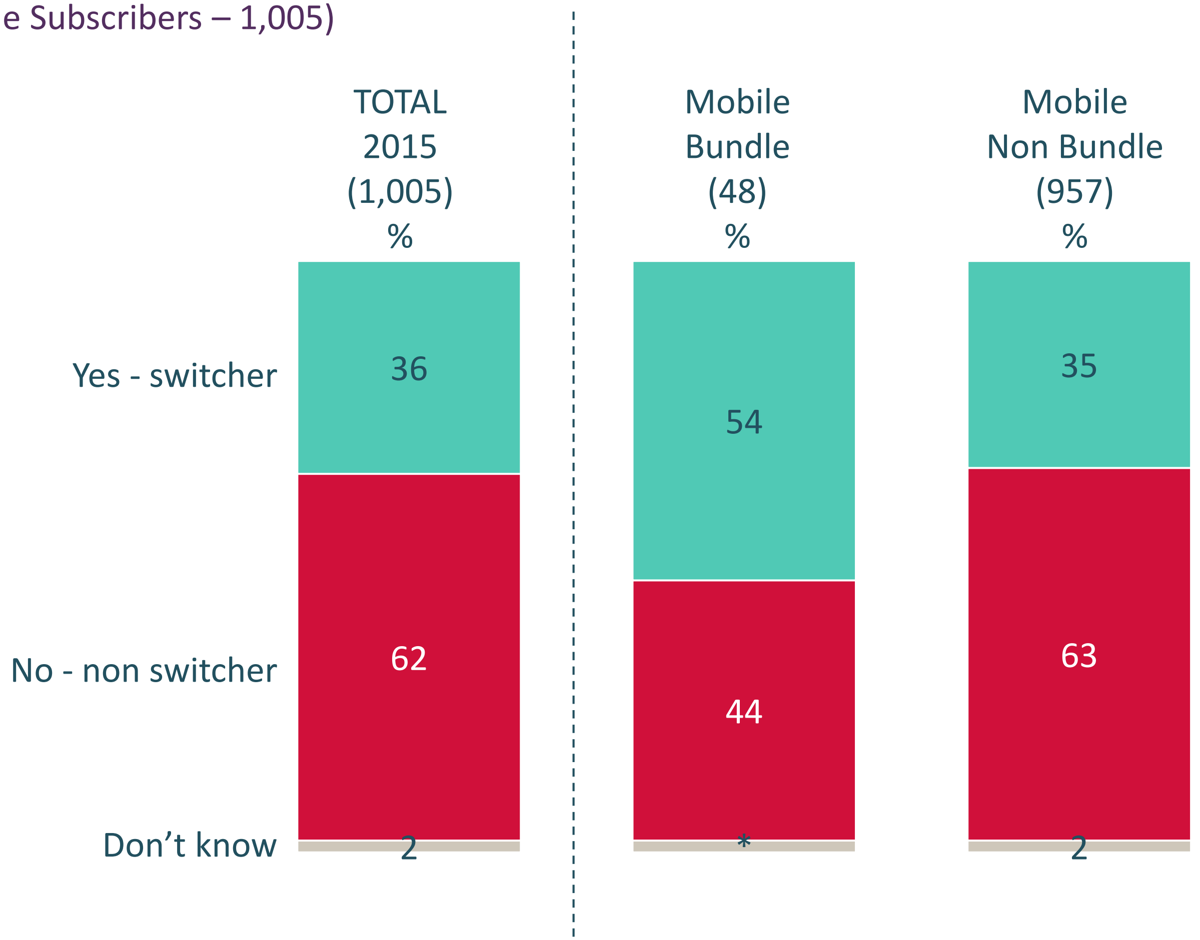


The length of time subscribed to mobile phone service is largely unchanged since 2013. Those who purchase mobile phone service in a bundle are likely to be with their provider for less time than those purchasing standalone mobile phone services.

(Q 39a)

Have you previously purchased your mobile phone service from a different service provider?

(Base: All Mobile Phone Subscribers – 1,005)



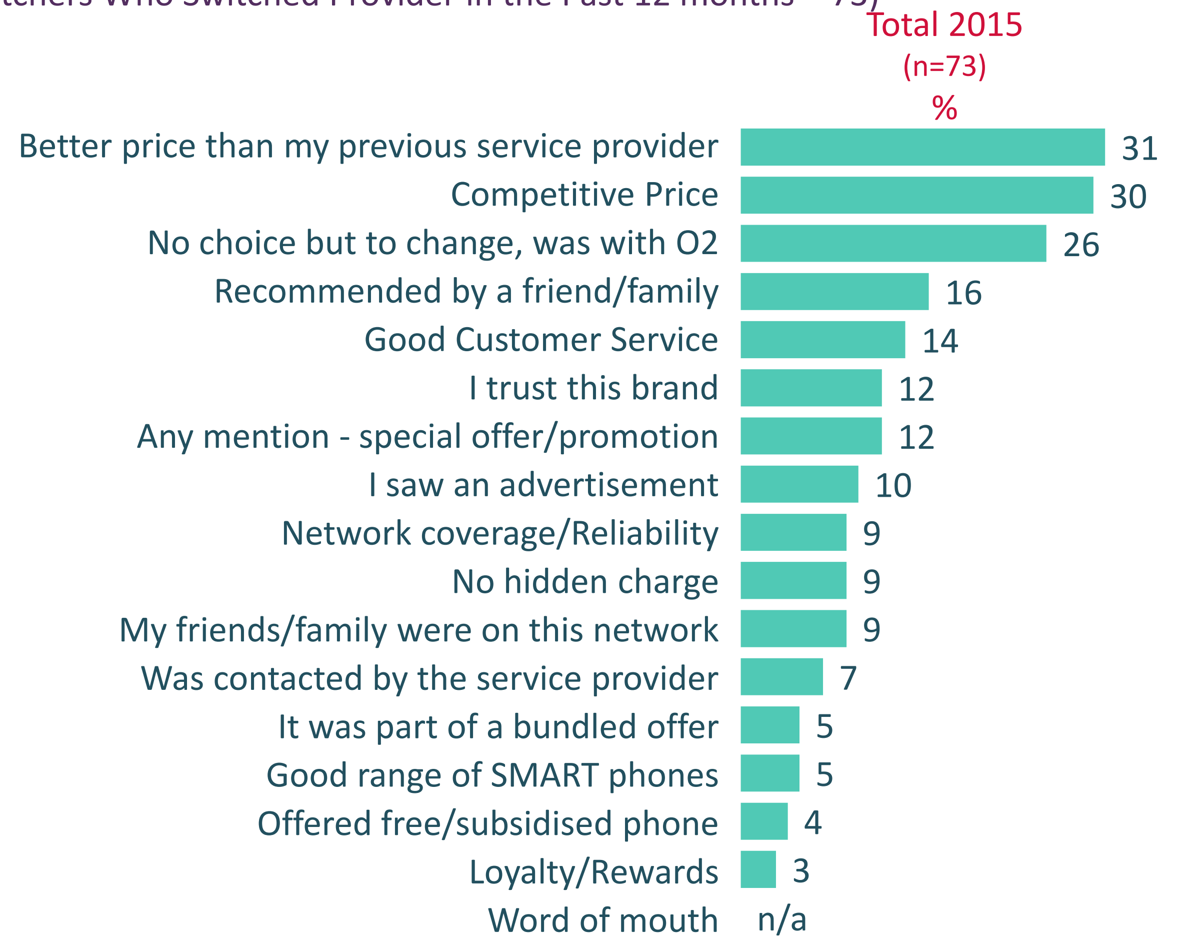
Switching questions asked in a different way in 2013

36% of mobile phone subscribers have switched their service provider. Switching is higher among those who purchase mobile phone service in a bundle with other services.

(Q.14d/39b)

Why did you switch mobile phone service provider? – (switchers in the past 12 months only)

(Base : All Mobile Switchers Who Switched Provider in the Past 12 months – 73)

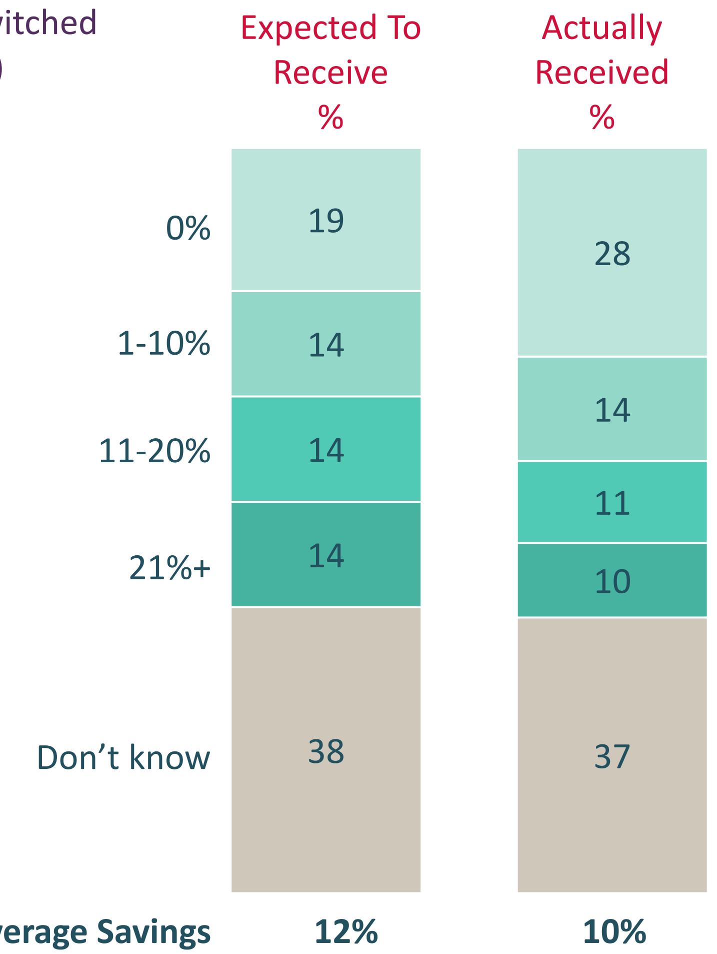


Price is the most commonly cited reason for switching.

(Q.40)

Expected v actual savings received when switching mobile phone service provider (switchers in the past 12 months only)

(Base : All Mobile Switchers Who Switched Provider in the Past 12 months – 73)



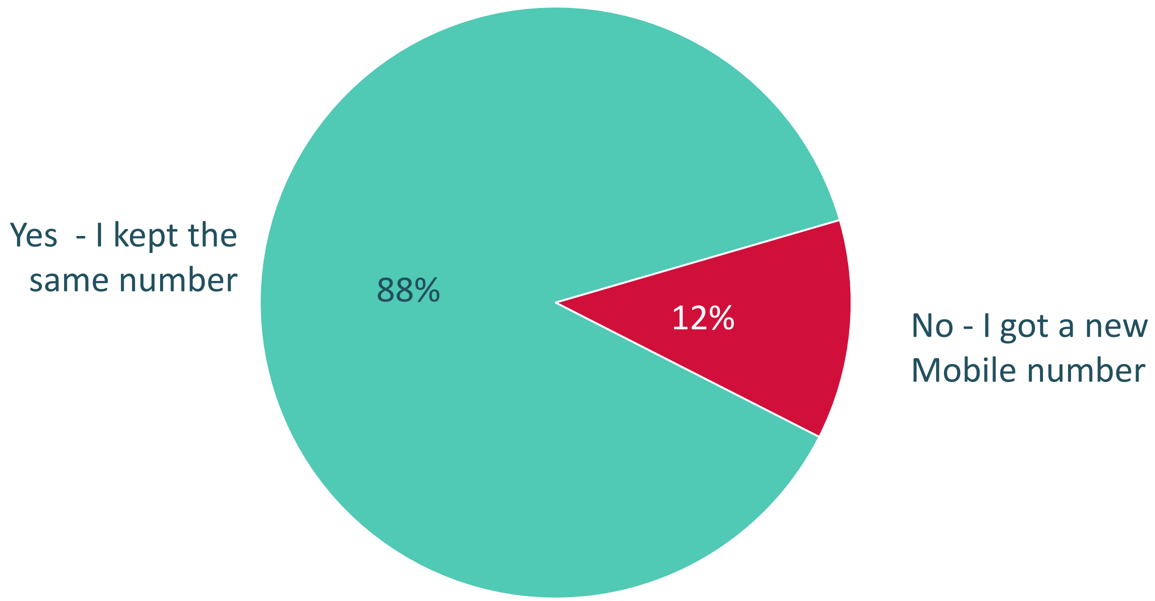
* Other bundles too small to show

Actual savings were less than expected savings (28% received no savings while only 19% did not expect to receive savings when switching service provider).

(Q.41/42)

Mobile phone number retention when switching mobile phone service providers

(Base : All Mobile Switchers – 362)

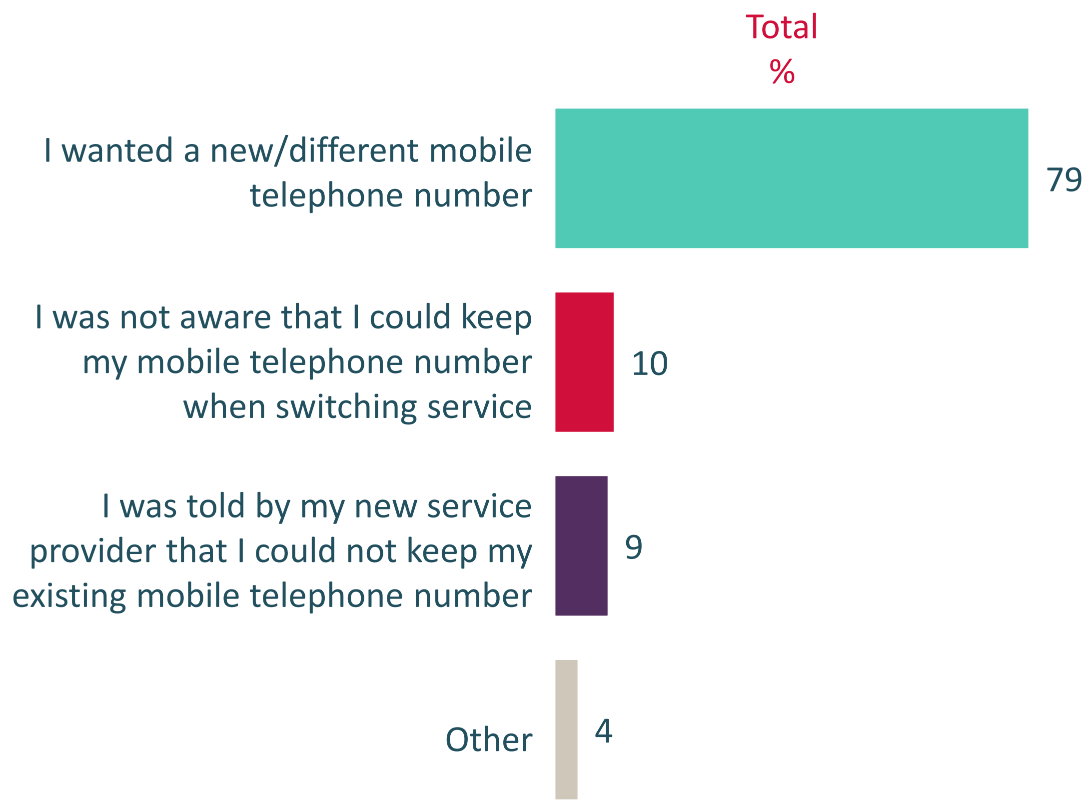


88% kept the same mobile phone number when switching and 12% got a new number

(Q.43)

Reasons for changing number

(Base : All Mobile Switchers who changed number – 46)

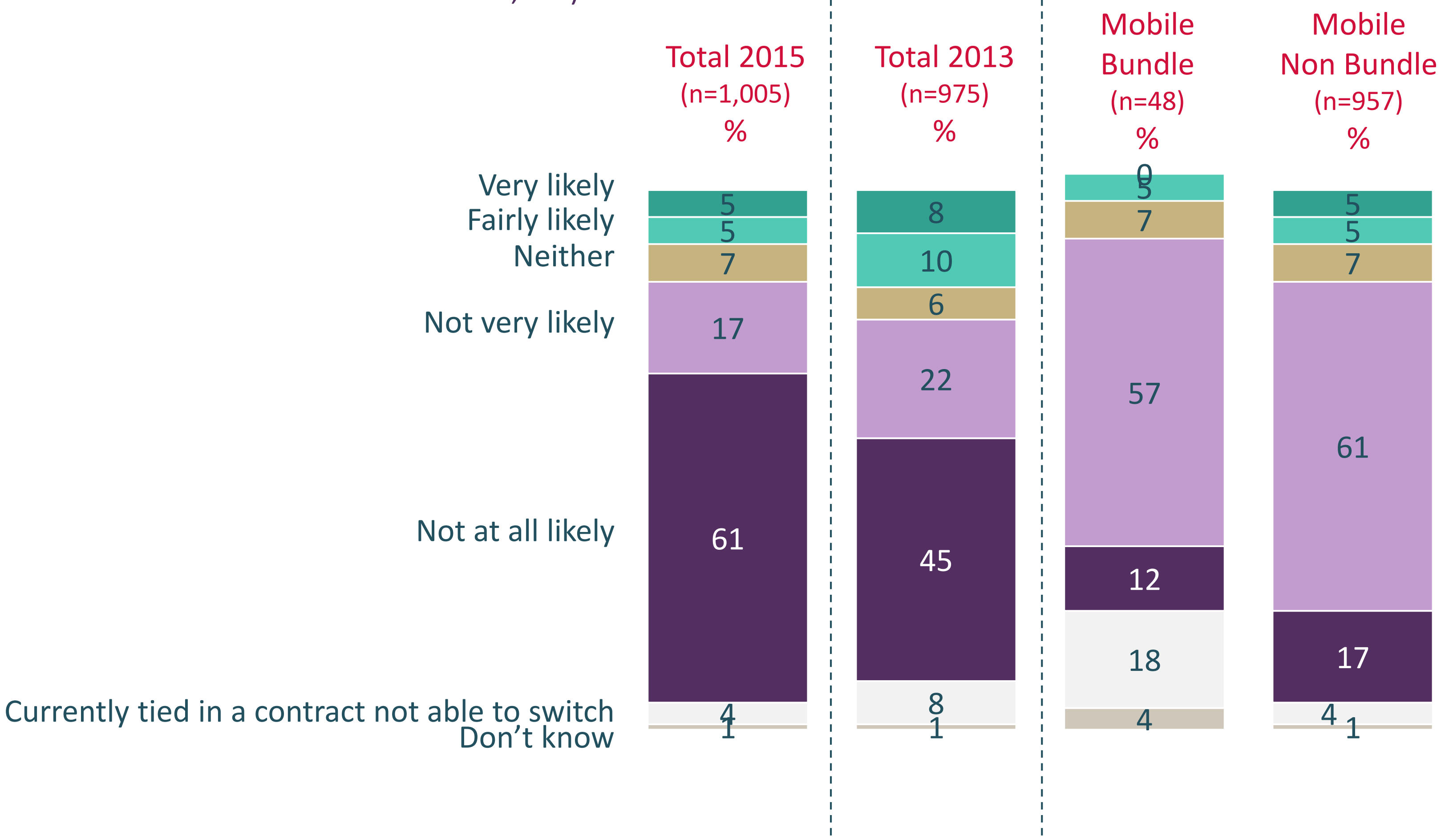


Among switchers who changed their mobile phone numbers, wanting a new/different number was the main reason for the change (79%)

(Q.44)

Likelihood to switch mobile phone service provider within the next 12 months

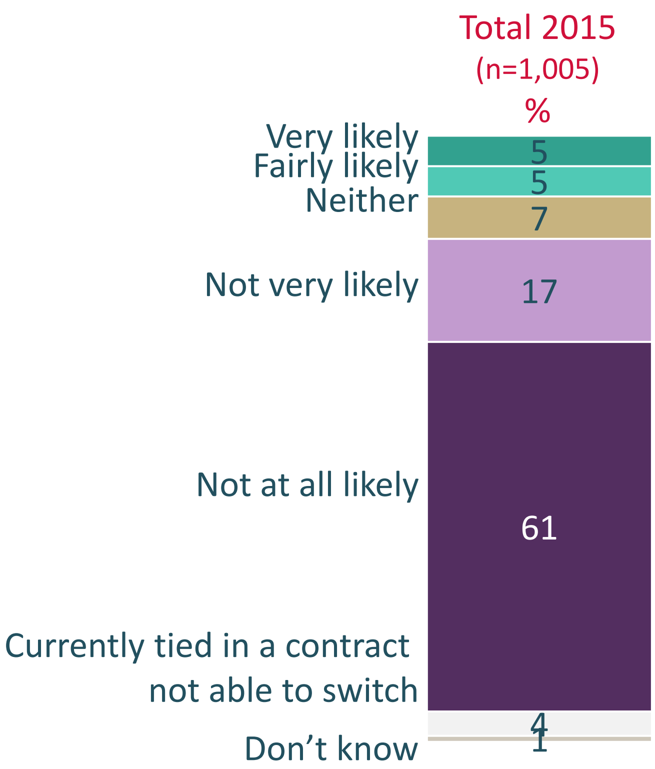
(Base : All Mobile Phone Subscribers – 1,005)



Likelihood to switch mobile phone service provider has fallen in 2015 (10%) down from 18% in 2013.

Likelihood to switch mobile phone service provider within the next 12 months

(Base : All Mobile Phone Subscribers – 1,005)



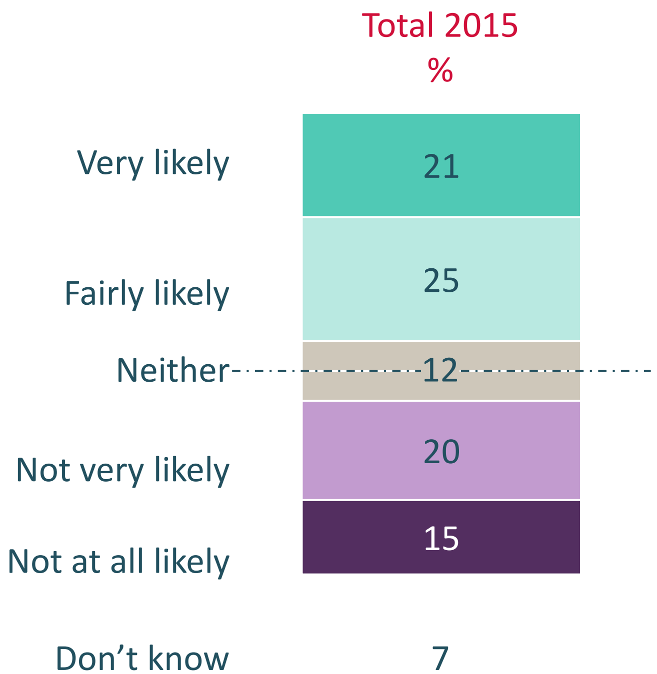
	Age					
	18-24 %	25-34 %	35-44 %	45-54 %	55-64 %	65+ %
Very Likely	6	6	8	4	2	1
Fairly Likely	9	4	6	6	3	3
Neither	5	6	9	7	5	6
Not vey likely	22	21	12	21	17	12
Not at all likely	55	55	58	57	65	77
Currently tied in a contract not able to switch	2	6	8	3	5	0
Don't know	2	1	0	1	1	2

Likelihood to switch mobile phone service is lower for those aged 55+

(Q45)

Likelihood to purchase mobile phone service in a bundle with other services (mobile phone non – bundle likely switchers only)

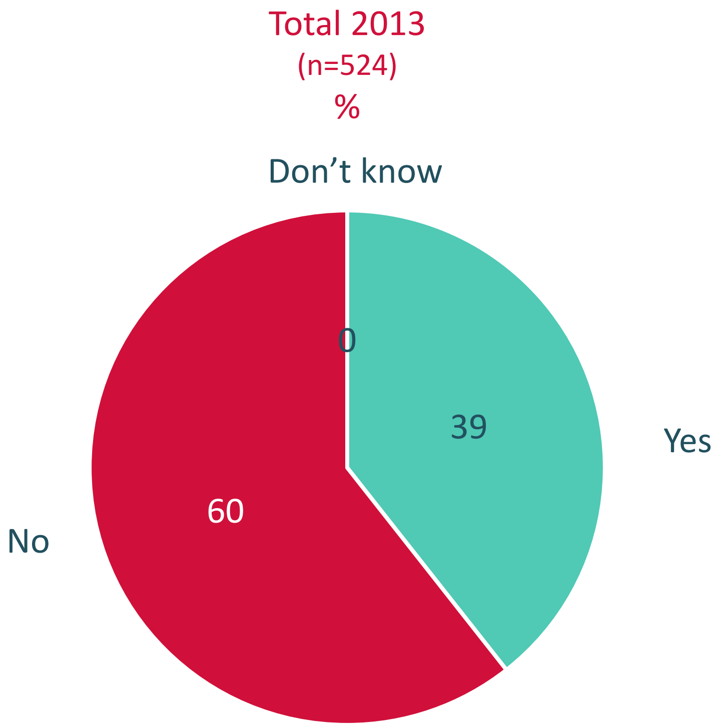
(Base : All Mobile Likely Switchers (non bundle) – 93)

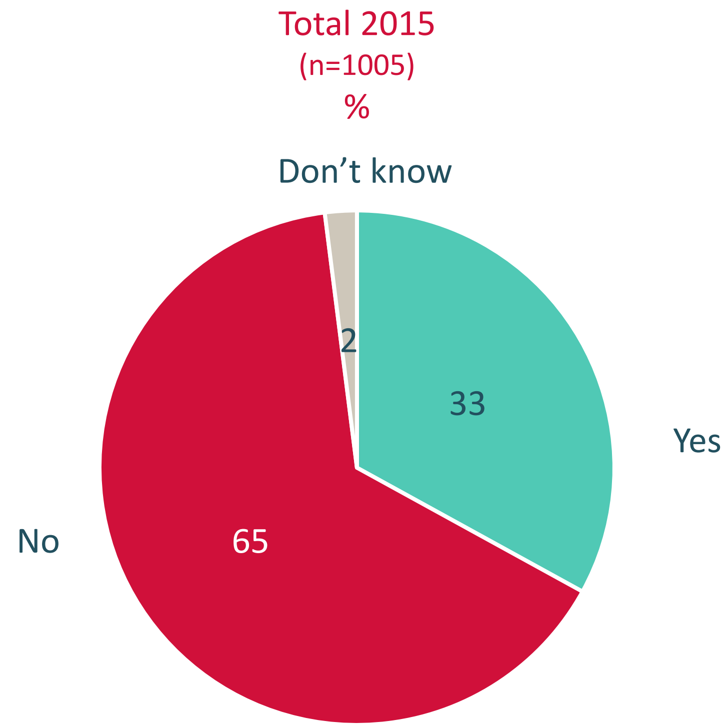


46% of respondents that are considering switching their mobile phone service provider are likely to purchase mobile phone service in a bundle with other services.

Incidence of receiving a text message advising that you are close to exceeding data allowance

(Base : All Mobile Phone Subscribers – 1005)

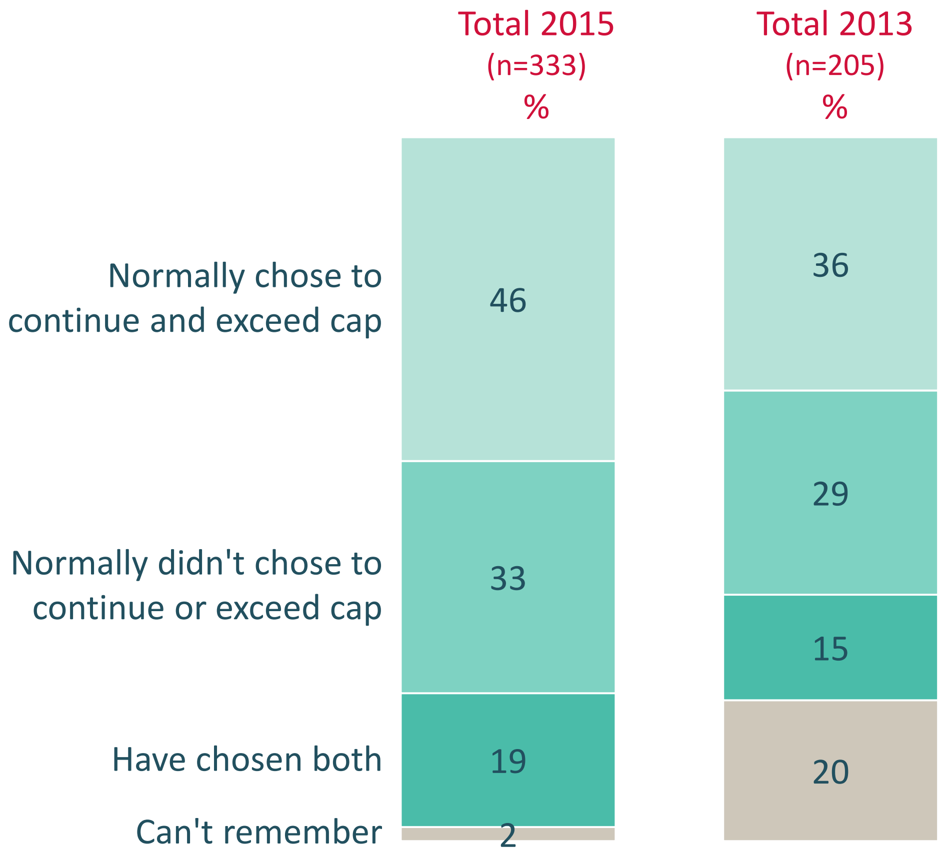




33% of mobile phone service subscribers claim to have received a text message advising them that they are close to exceeding data allowance in 2015 compared with 39% in 2015.

Actions taken after receiving data allowance notification

(Base : All Mobile Phone Subscribers Who Got A Text Message About Usage – 333)



46% of subscribers who received data allowance notification chose to exceed data allowance cap in 2015 (compared to 36% in 2013).

Fixed Broadband

Fixed broadband service provider

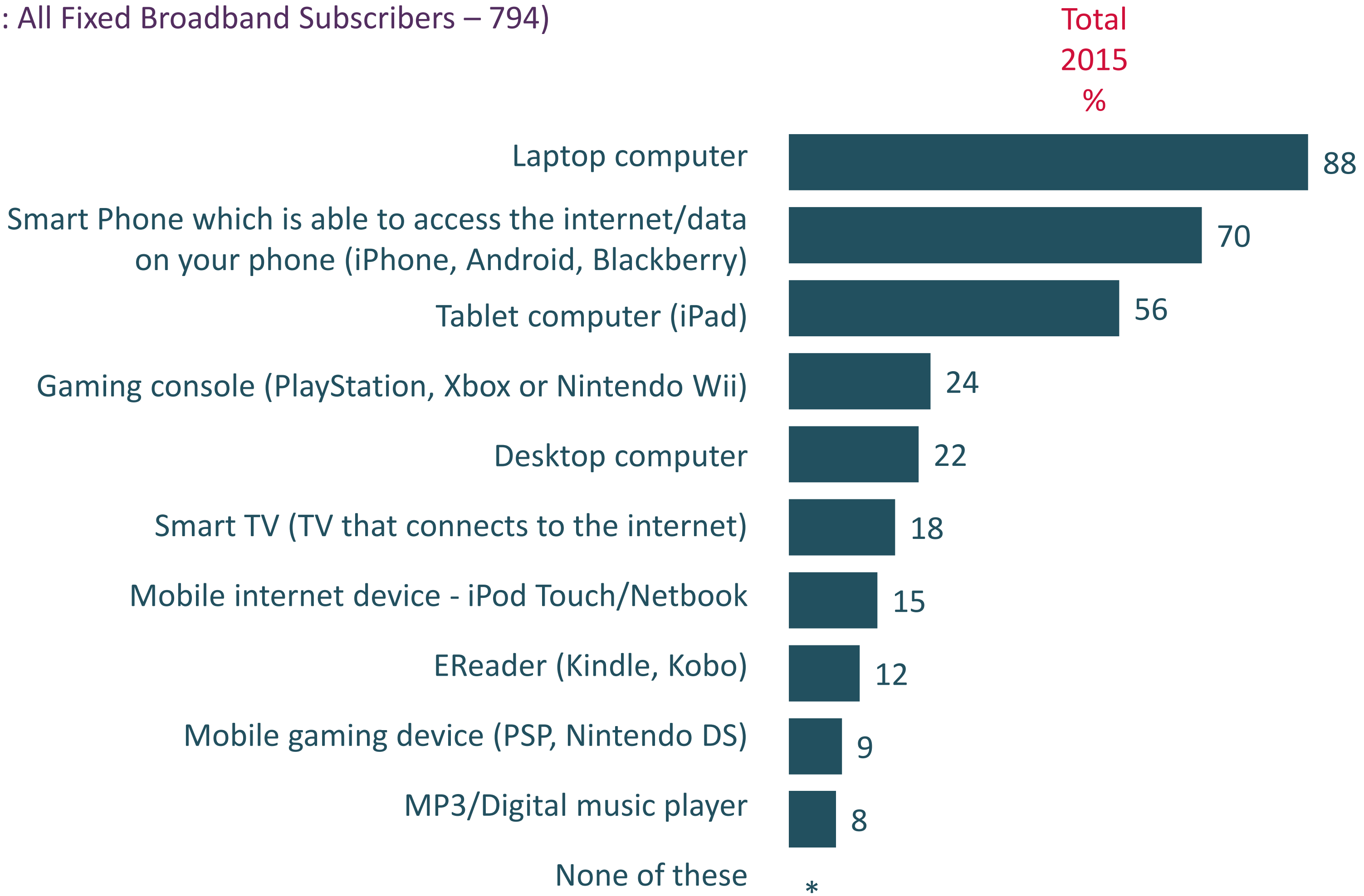
(Base: All Fixed Broadband Subscribers - 794)

	Total 2015 %	Total 2013 (659) %	Area -2015: Dublin (260) %	Total Urban (548) %	Urban Less Dublin (288) %	Rural (246) %
Eircom	35	39	15	26	37	53
UPC (Prev Chorus/NTL)	28	25	67	41	18	1
Vodafone at Home	21	17	8	18	27	27
Sky Broadband	12	1	9	12	14	11
Imagine	1	1	1	1	1	2
Digiweb	1	1	0	0	0	2
Other	3	16	0	1	2	3

35% of all fixed broadband service subscribers purchase this service from Eircom (compared to 39% in 2013) with this figure rising to 53% in rural areas. In Dublin, 67% of respondents purchasing fixed broadband service are UPC's customers.

Devices connected to fixed broadband service at home

(Base : All Fixed Broadband Subscribers – 794)



Laptops are most commonly connected to fixed broadband service at home (88%) followed by smart phones (70%) and tablets (56%).

(Q49)

Use of fixed broadband service - I

(Base : All Fixed Broadband Subscribers – 794)

	Total	Gender		Age						Social Class	
	%	Male %	Female %	18-24 %	25-34 %	35-44 %	45-54 %	55-64 %	65+ %	ABC1 %	C2DEF %
Browsing the internet	98	98	99	100	96	99	99	100	98	99	98
Using email	88	86	89	91	87	90	91	83	87	90	86
Connecting my mobile phone to my home broadband service via Wi-Fi	67	67	67	79	76	77	70	48	44	72	63
Manage Banking/Pay Bills/Other Services	65	67	63	61	73	71	65	61	46	72	59
Purchasing goods/services	63	63	62	66	70	69	72	53	35	68	59
Social Media, Instant Messaging (e.g Facebook, WhatsApp, Twitter, LinkedIn)	62	63	62	90	82	75	61	35	23	66	59
Using real time video/voice messaging (e.g. SKYPE, Viber, FaceTime)	52	53	51	74	59	52	56	38	36	60	45
Downloading/streaming movies, music/TV programmes	32	36	29	53	45	38	34	12	10	36	29
Catch Up TV Services (Sky On Demand, RTÉ player)	31	31	30	43	42	35	33	19	6	35	27
Accessing paid for TV streaming services, such as NETFLIX	23	24	23	43	28	23	27	13	10	27	20
Gaming	23	24	22	38	31	27	26	7	5	27	19
Working at home/Teleworking	17	19	16	21	20	20	19	12	9	24	12

Fixed broadband service is most commonly used for browsing the internet (98%) and using email (88%). Usage patterns vary significantly across age categories.

(Q.52)

Use of fixed broadband service - II

(Base : All Fixed Broadband Subscribers – 794)

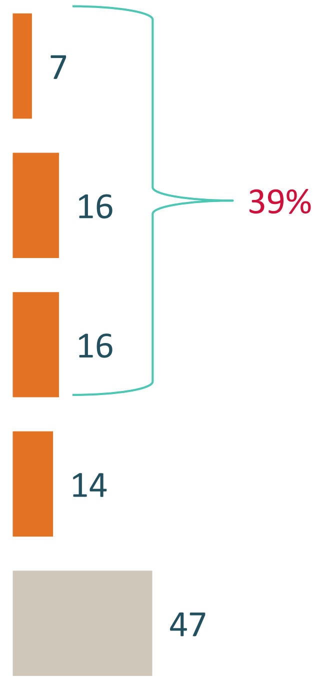
	Total %	Area: Dublin %	Total Urban %	Total Urban (Ex Dub) %	Total Rural %
Browsing the internet	98	99	98	98	99
Using email	88	89	90	90	84
Connecting my mobile phone to my home broadband service via Wi-Fi	67	65	66	68	69
Manage Banking/Pay Bills/Other Services	65	62	67	72	59
Purchasing goods/services	63	59	66	72	55
Social Media, Instant Messaging (e.g Facebook, WhatsApp, Twitter, LinkedIn)	62	59	64	68	59
Using real time video/voice messaging (e.g. SKYPE, Viber, FaceTime)	52	55	53	52	50
Downloading/streaming movies, music/TV programmes	32	31	36	40	24
Catch Up TV Services (Sky On Demand, RTÉ player)	31	23	31	38	30
Accessing paid for TV streaming services, such as NETFLIX	23	21	26	31	17
Gaming	23	18	25	30	19
Working at home/Teleworking	17	14	19	23	14

Activities requiring higher speed fixed broadband service (e.g. downloading content) are cited less frequently by respondents from rural areas.

(Q.52)

Frequency of using VOIP services - I

(Base : All Fixed Broadband and Mobile Phone Subscribers – 1018)

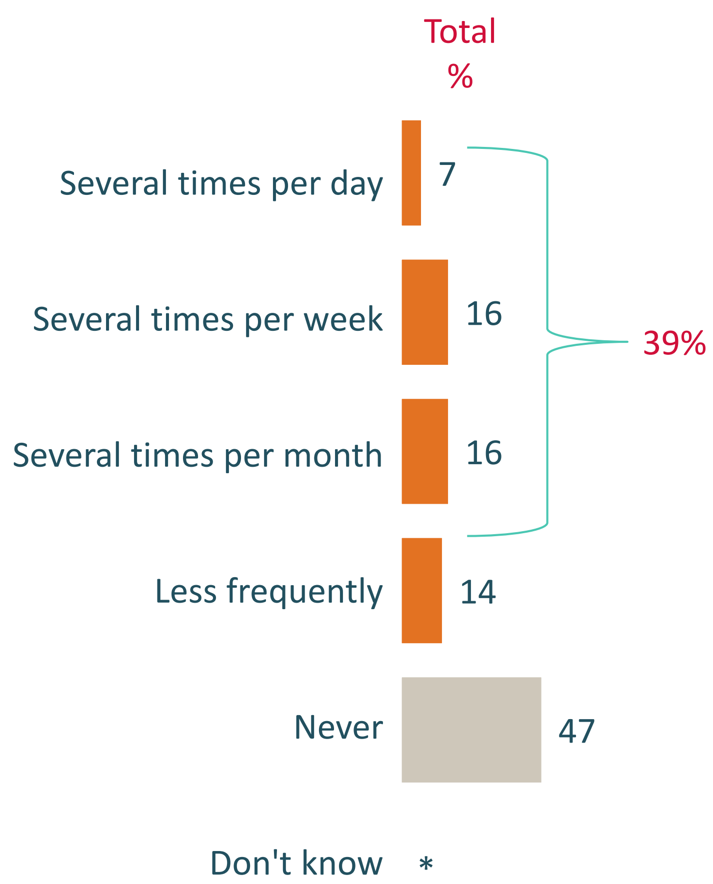


	Total	Gender		Age						Social Class	
	%	Male %	Female %	18-24 %	25-34 %	35-44 %	45-54 %	55-64 %	65+ %	ABC1 %	C2DEF %
Several times per day	7	6	8	19	12	7	5	1	2	10	5
Several times per week	16	14	17	24	25	15	12	11	8	18	14
Several times per month	16	15	18	19	22	17	16	11	12	20	14
Less frequently	14	15	13	10	12	19	18	14	8	16	13
Never	47	49	44	28	29	41	49	62	70	36	54
Don't know	*	*	0	0	*	0	0	0	0	*	0

39% of all mobile phone and fixed broadband subscribers use VOIP services several times per month or more frequently. Using VOIP services is most common among 18-24 year olds (62% use VOIP several times per month or more frequently in this age category).

Frequency of using VOIP services - II

(Base : All Fixed Broadband and Mobile Phone Subscribers – 1018)

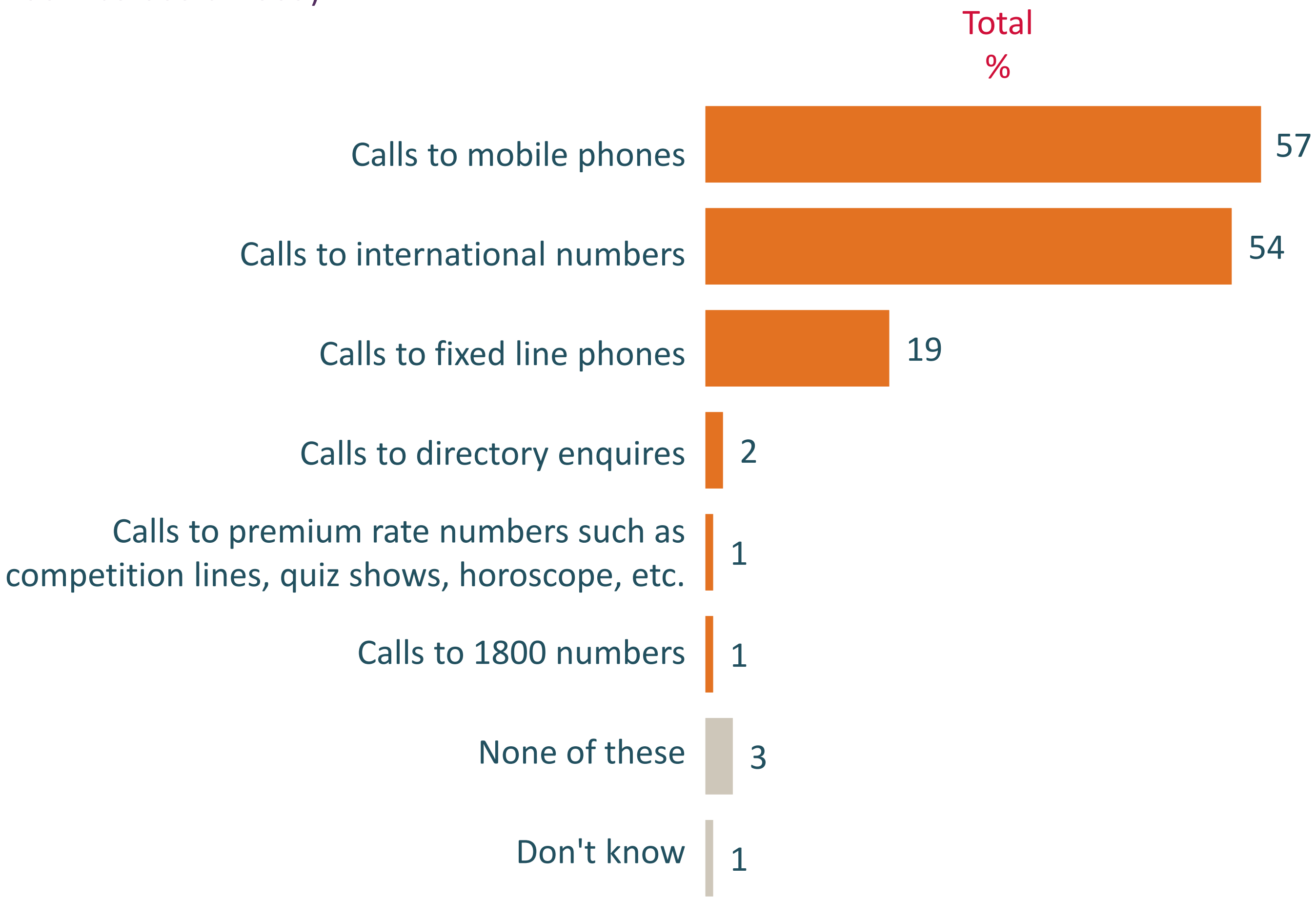


	Area			
	Dublin %	Total Urban %	Total Urban (Ex Dub) %	Total Rural %
Several times per day	12	8	5	5
Several times per week	19	18	17	12
Several times per month	19	18	17	14
Less frequently	10	13	16	16
Never	41	43	45	52
Don't know	*	*	0	0

Dubliners are most likely to use VOIP several times a month or more frequently (50%) with this figure declining to 31% among respondents from rural areas.

Types of calls made using VOIP services

(Base : All VOIP Service Users – 539)

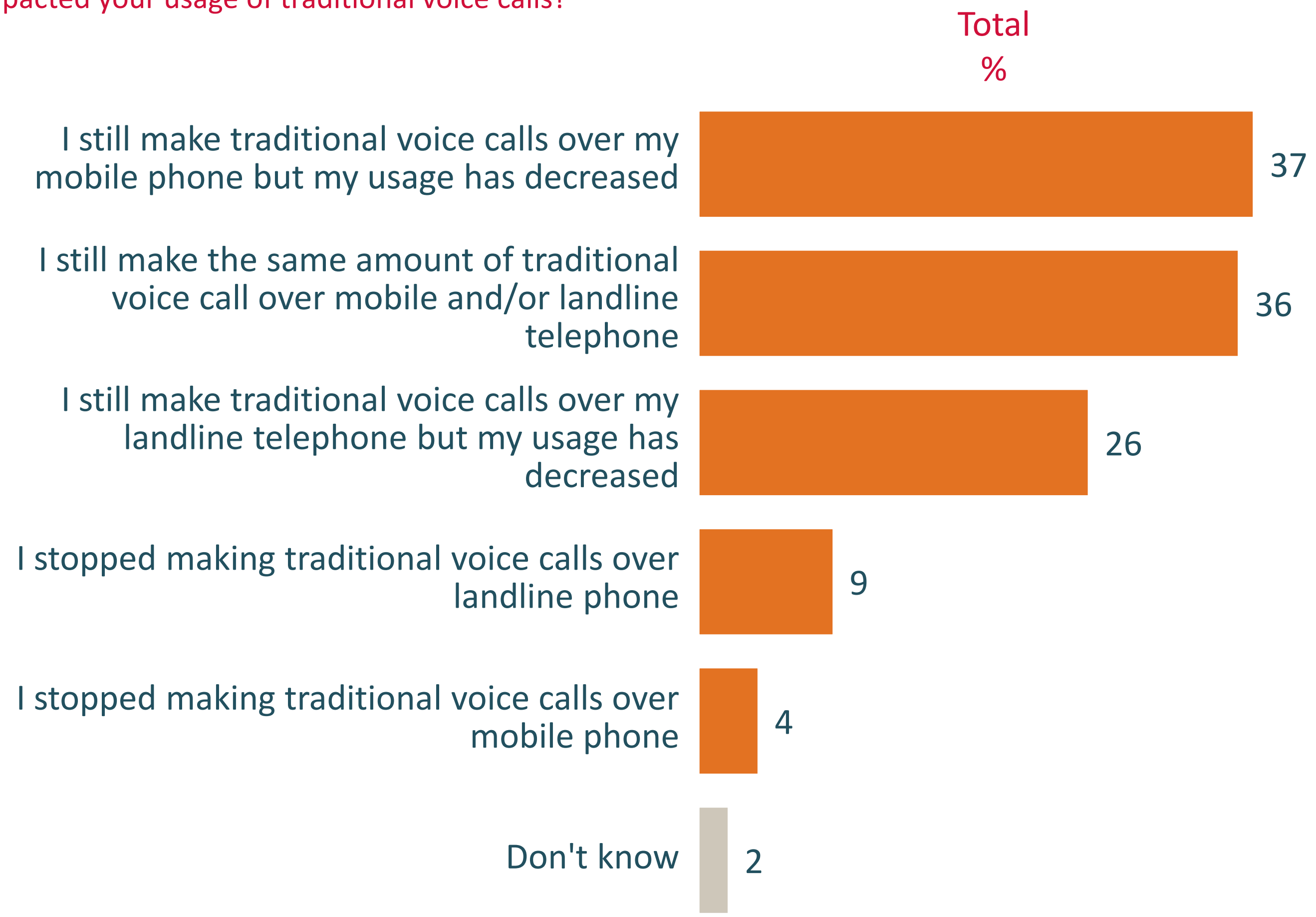


Calls to mobile phones (57%) and international numbers (54%) are the most common types of calls made via VoIP services.

Impact of VOIP service usage on use of traditional voice calls

(Base : All VOIP Service Users – 539)

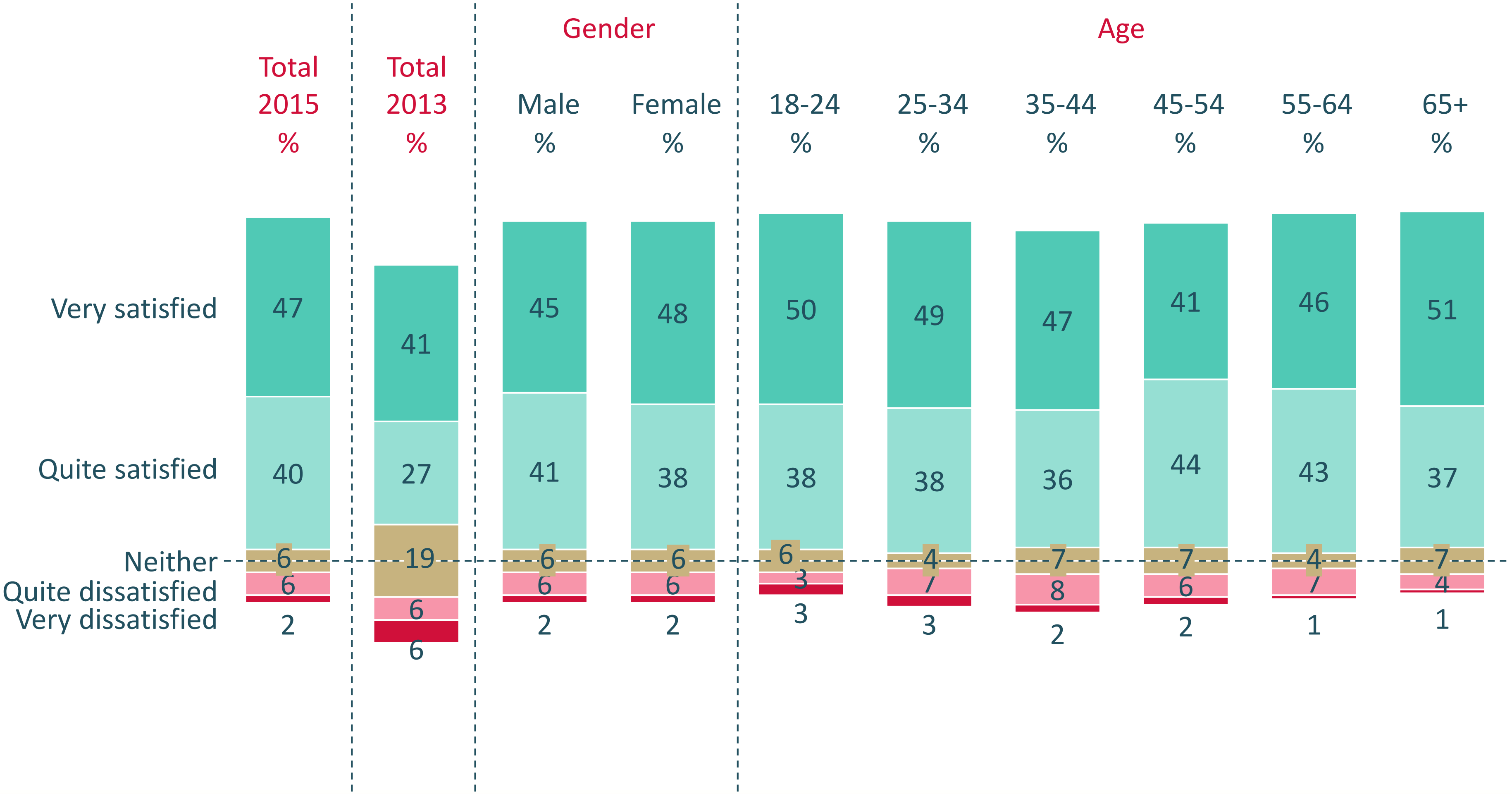
Q.55 Has the usage of voice over broadband service, such as SKYPE/FaceTime/Viber to make a phone call impacted your usage of traditional voice calls?



The majority of respondents using VOIP services noted that they have reduced the number of calls they make via mobile and/or home landline phone.

Satisfaction with fixed broadband service - I

(Base : All Fixed Broadband Subscribers – 794)

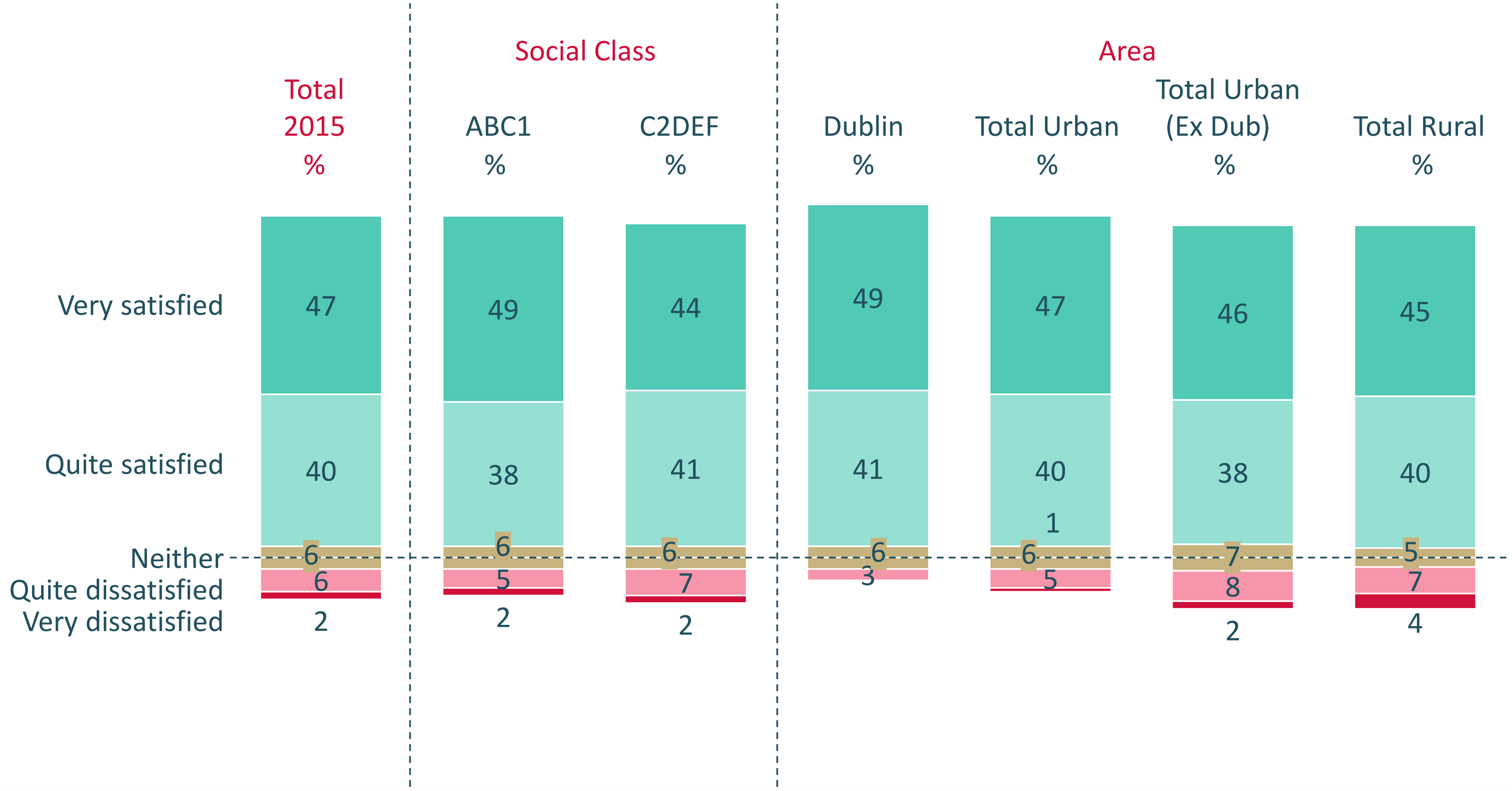


Satisfaction with fixed broadband service is 87% in 2015 compared to 68% in 2013. Satisfaction is highest among the 18-24, 55-64, and 65+ age categories.

(Q.56a)

Satisfaction with fixed broadband service - II

(Base : All Fixed Broadband Subscribers – 794)

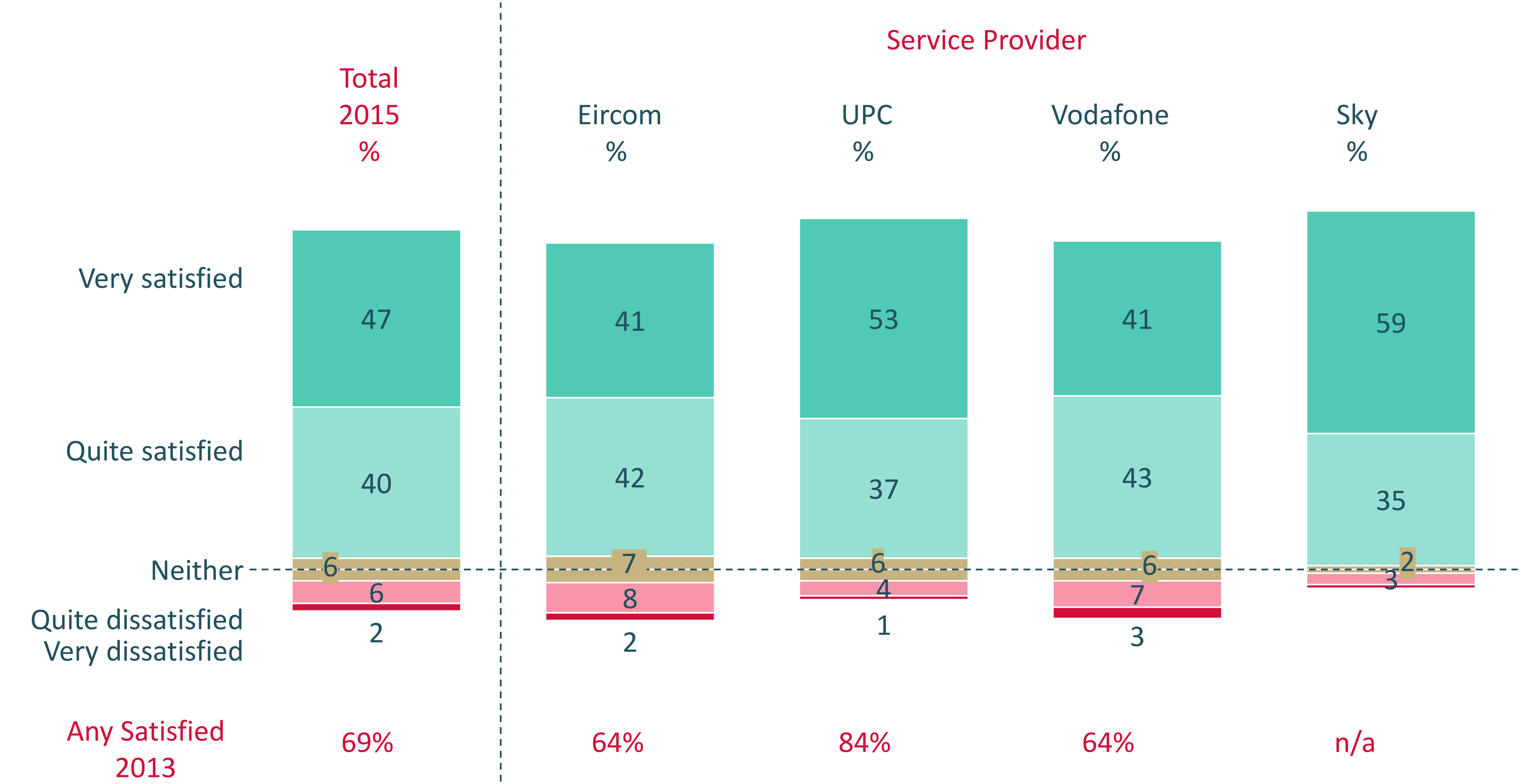


Satisfaction with Fixed Broadband Service is highest in Dublin at 90%.

(Q.56a)

Satisfaction with fixed broadband service - III

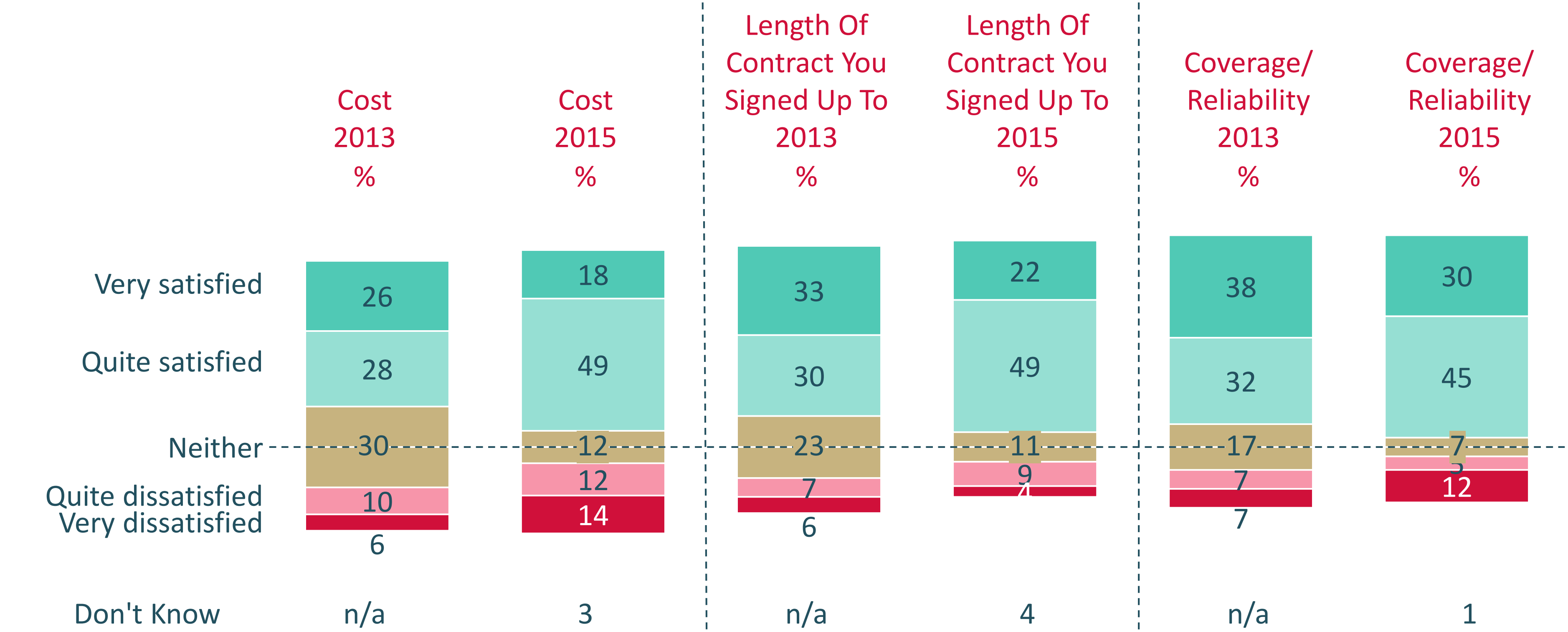
(Base : All Fixed Broadband Subscribers – 794)



The level of satisfaction is similar across fixed broadband service providers with Sky having a higher share of very satisfied subscribers compared to other fixed broadband service providers.

Satisfaction with elements of fixed broadband service: summary (cost, length of contract, coverage/reliability, actual speed) - I

(Base : All Fixed Broadband Subscribers - 794 (2013 - 614))



Net Satisfaction %							
	Urban	56	67	64	74	73	78
	Rural	50	67	62	65	62	69

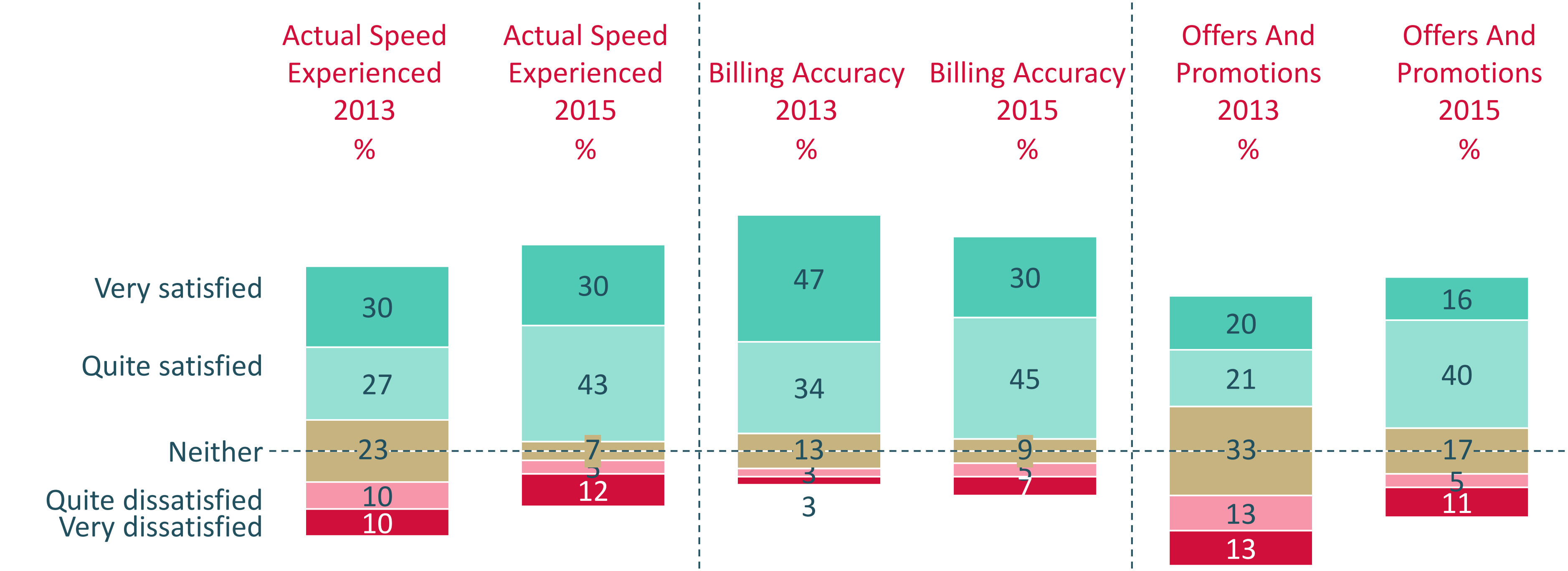
Satisfaction levels with cost, length of contract and coverage/reliability of fixed broadband service is higher in 2015 versus 2013.

REDC

(Q.56b)

Satisfaction with elements of fixed broadband service: summary (cost, length of contract, coverage/reliability, actual speed) - II

(Base : All Fixed Broadband Subscribers - 794 (2013 - 614))



		Actual Speed Experienced 2013	Actual Speed Experienced 2015	Billing Accuracy 2013	Billing Accuracy 2015	Offers And Promotions 2013	Offers And Promotions 2015
Don't Know		n/a	1	n/a	5	n/a	11
Net Satisfaction %	Urban	61	76	82	77	44	59
	Rural	48	65	80	69	35	49

Satisfaction with actual speed experienced and offers and promotions is higher in 2015 versus 2013.

Satisfaction with elements of fixed broadband service by demographics

(Base : All Fixed Broadband Subscribers – 794)

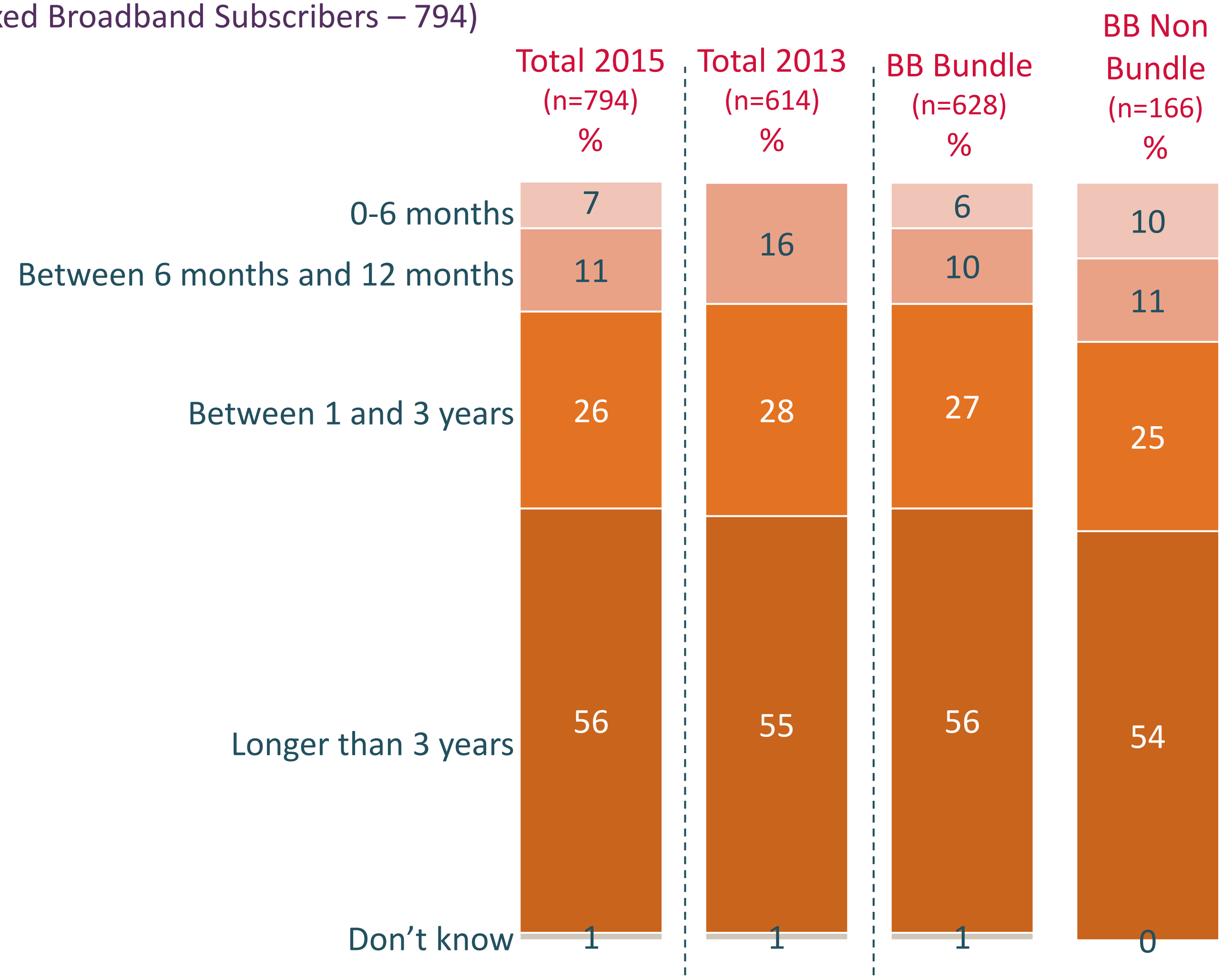
	Total %	Age 18-24 %	Age 25-34 %	Age 35-44 %	Age 45-54 %	Age 55-64 %	Age 65+ %	Region Dublin %	Region Total Urban %	Region Urban less Dublin %	Region Rural %
Coverage/Reliability	75	74	75	77	72	73	78	79	78	76	69
Billing Accuracy	75	57	72	76	79	77	81	74	77	80	69
Actual Speed Experienced	72	78	78	68	71	77	72	77	76	74	65
Length of Contract You Signed up to	71	65	71	74	70	75	71	74	74	75	65
Cost	67	58	67	71	66	67	65	63	67	70	67
Special Offers/Promotions	56	53	55	52	59	59	58	61	59	57	49

Satisfaction with each aspect of fixed broadband service tends to be lower in rural Ireland with the exception of cost of the service.

(Q.56b)

Length of time subscribed to fixed broadband service provider

(Base : All Fixed Broadband Subscribers – 794)

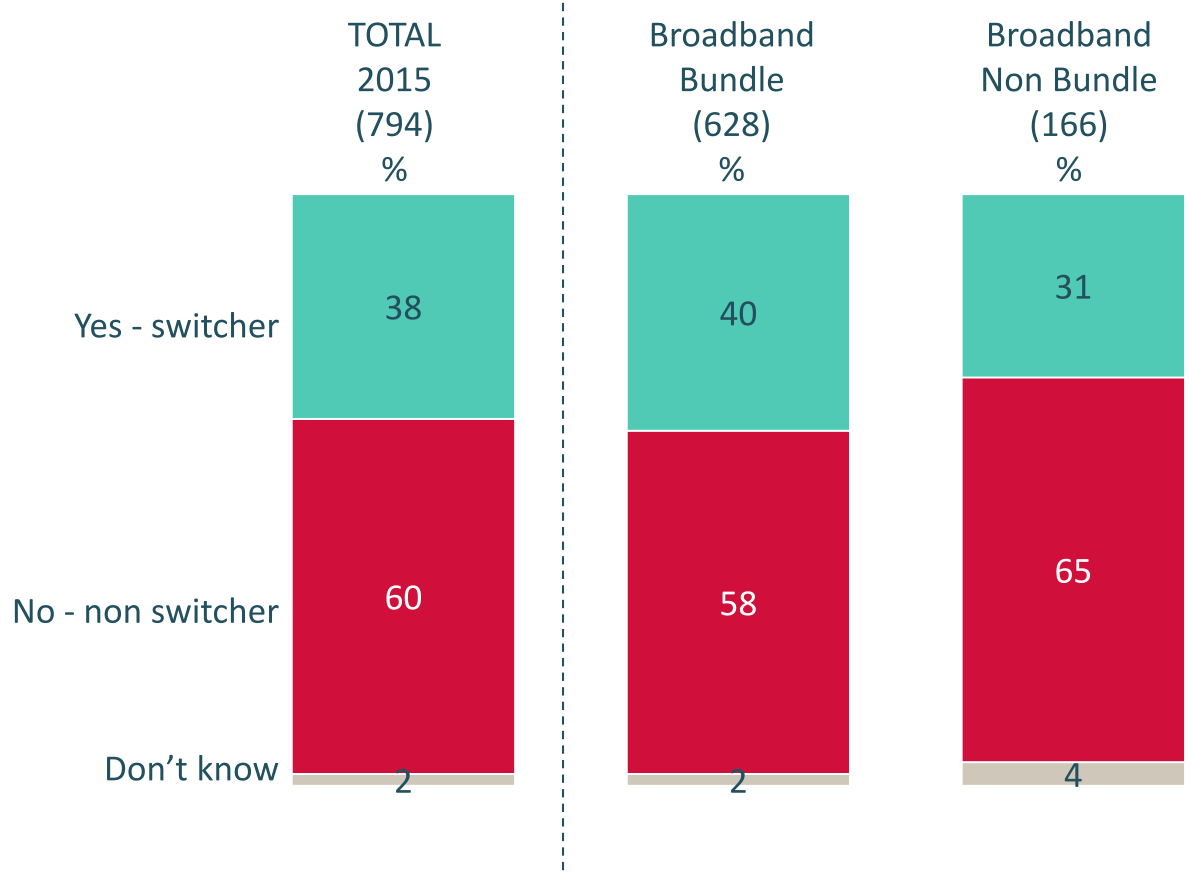


Length of time subscribed to fixed broadband service with the same service provider has changed little since 2013.

(Q.57a)

Have you previously purchased fixed broadband service from another provider?

(Base: All Fixed Broadband Subscribers - 794)



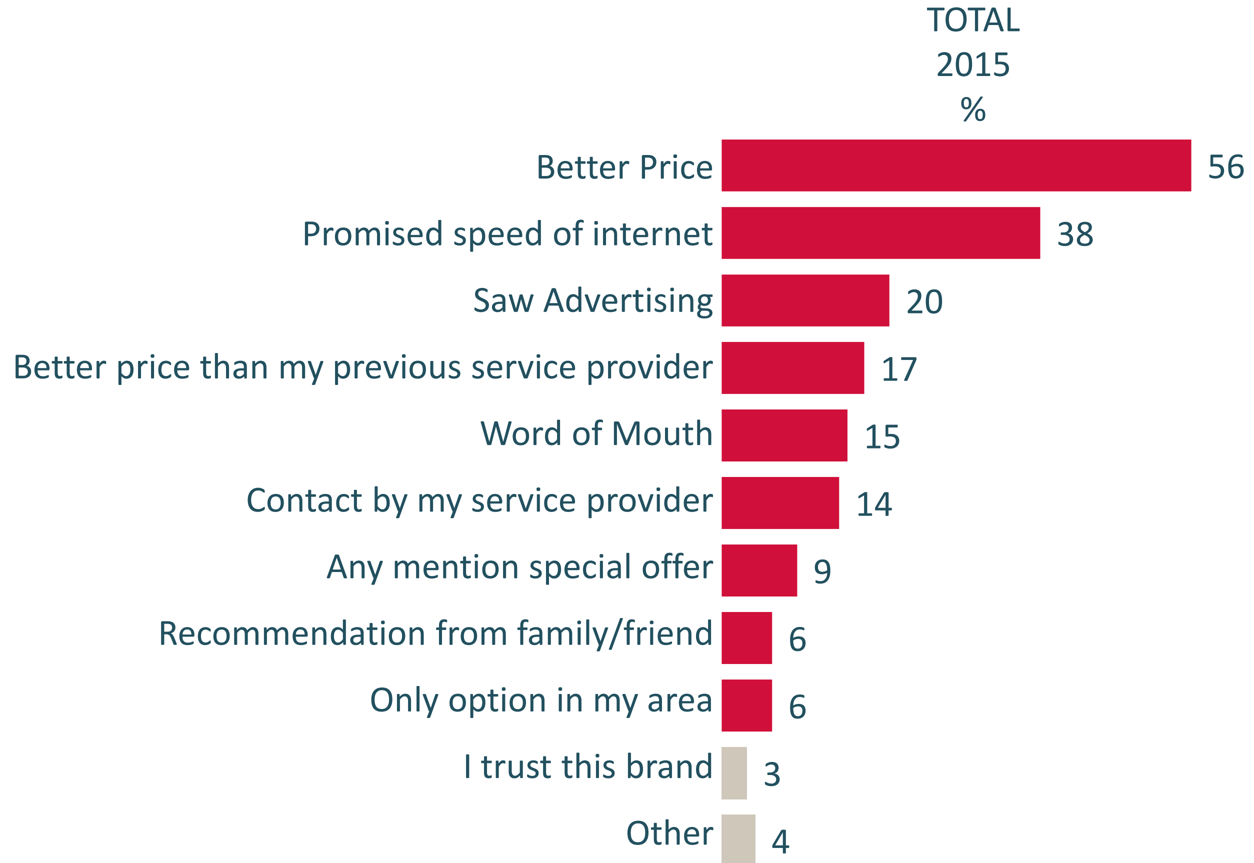
Switching questions asked in a different way 2013

38% of all fixed broadband subscribers have switched provider. Switching is higher among those purchasing fixed broadband in a bundle with other services.

(Q.14d/57b)

Why did you switch fixed broadband service provider (switchers in the past 12 months only)

(Base: All Who Switched Bb Bundle In Last Year And All Non Bundle Fixed Bb Subscribers Who Switched (And Stated Provider) - 78)



*Note: Small Base Size
2013 reasons stated are not comparable

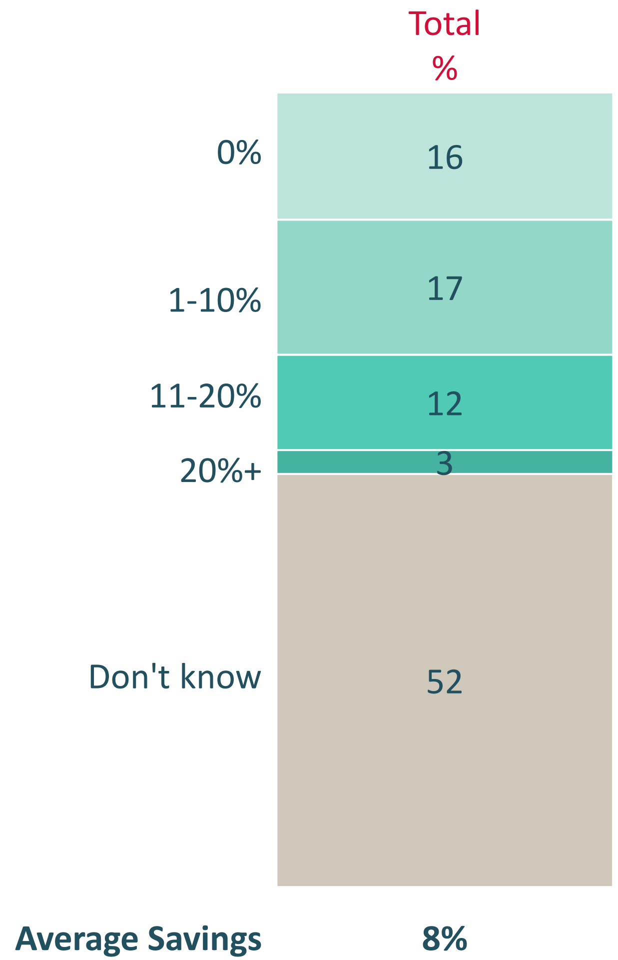
Price (56%) and Broadband/Internet Speed (38%) are the main reasons for switching fixed broadband service providers.

REDC

(Q 15/58)

Perceived percentage savings on monthly bill if looked for better deal?

(Base : All Non Bundle Fixed Broadband Subscribers – 166)

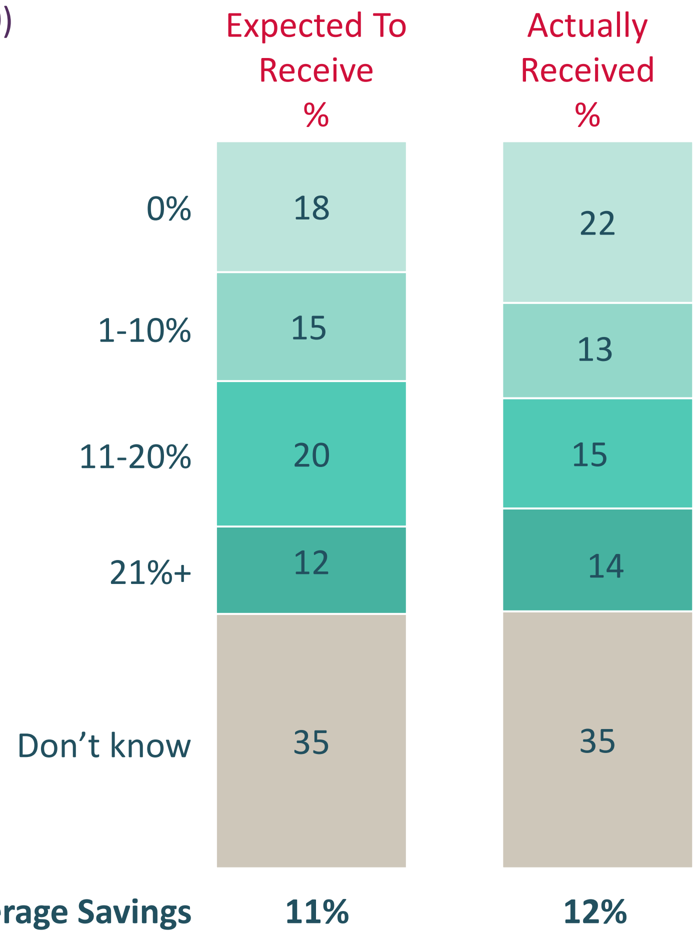


16% of standalone fixed broadband service subscribers expect to receive no savings if they search for the best deal while a further 52% don't know what savings they might receive.

(Q.51)

Expected v actual savings received when switching fixed broadband service provider (switchers in the past 12 months only)

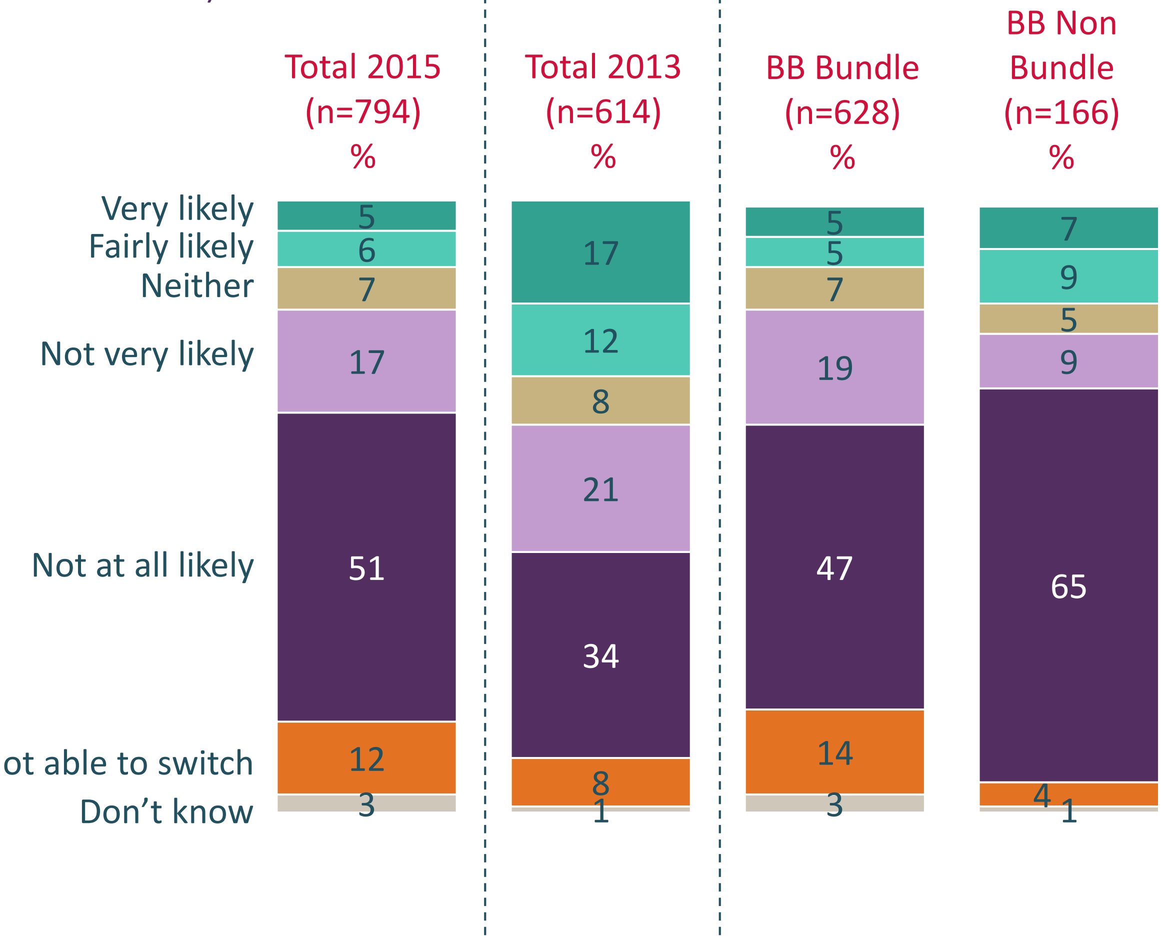
(Base : All Fixed Broadband Switchers Who Switched Provider in the Past 12 months – 50)



Expected savings and actual savings received are broadly similar.

Likelihood to switch fixed broadband service provider within the next 12 months

(Base : All Fixed Broadband Subscribers – 794)

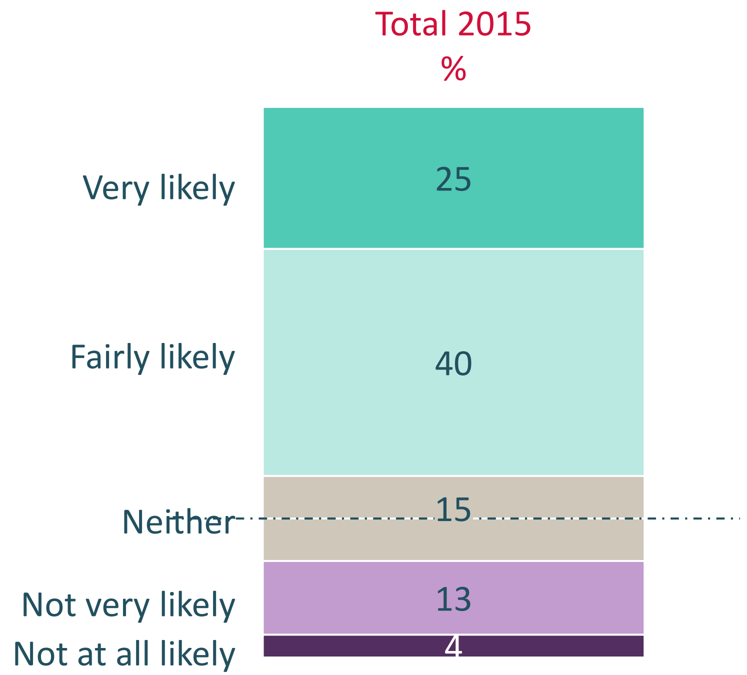


Likelihood to switch fixed broadband service provider in 2015 is lower compared to 2013 (11% in 2015 versus 29% in 2013).

(Q.61)

Likelihood to purchase fixed broadband service in a bundle with other services

(Base : Standalone Fixed Broadband Subscribers who are likely to Switch Provider within the next 12 Months – 26*)



	Total 2015 %
Don't know	3
Mean Score	**3.71**

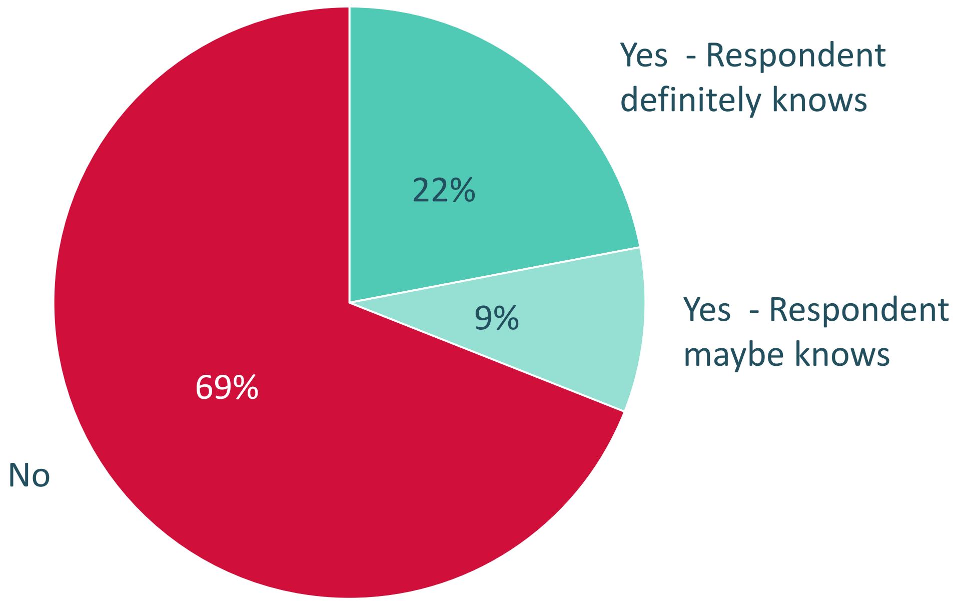
*Based Size is Small

65% of respondents purchasing standalone fixed broadband service are likely to purchase a fixed broadband bundle if they switch provider within the next 12 months.

(Q.62)

Awareness of fixed broadband service download speeds

(Base : All Fixed Broadband Subscribers -794)



31% of fixed broadband subscribers are aware of the maximum claimed 'up to' download speed of their fixed broadband service.

(Q.63)

Stated maximum download speed

(Base: All fixed broadband subscribers who are aware of download speed – 244)

	2015 %	Region: Dublin %	Region: Total Urban %	Region: Urban less Dublin %	Region: Rural %
<10 Mpbs	19	2	16	26	26
10-29.99 Mbps	28	11	20	26	46
30-99.99 Mbps	21	22	22	23	17
100+ Mbps	28	62	37	19	7
Don't know	4	3	5	6	3
Average	54Mbps	99Mbps	69Mbps	46Mbps	26Mbps

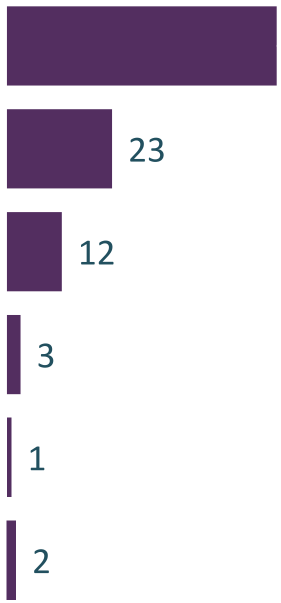
49% of respondents claimed that the download speed of their fixed broadband service is over 30Mbps (28% stating that speeds exceed 100 Mbps). Very signification variation in stated broadband speeds across regions with lowest speeds in rural areas.

(Q.64)

Mobile Broadband

Mobile broadband provider

(Base: All Mobile Broadband Subscribers – 103)



	Total 2015 %	Total 2013 (217) %	Area -2015: Dublin (12) %	Total Urban (52) %	Urban Less Dublin (40) %	Rural (51) %
Three Group	59	44	61	61	61	57
Vodafone	23	25	33	23	20	24
Eircom Group Mobile	12	22	6	11	13	12
Tesco Mobile	3	0	0	4	5	2
Other	1	7	0	1	2	0
Don't know	2	2	0	0	0	5

(Note : For the purpose of better comparisons, Three and O2 shares in 2013 were combined)

59% of all mobile broadband subscribers purchase this service from Three Group (compared to 44% in 2013).

(Q 7)

Use of mobile broadband service - I

(Base : All Mobile Broadband Subscribers – 103)

	Total	Gender		Age*						Social Class	
	%	Male %	Female %	18-24 %	25-34 %	35-44 %	45-54 %	55-64 %	65+ %	ABC1 %	C2DEF %
Browsing the internet	92	96	88	100	92	96	91	88	77	96	90
Using email	77	74	81	89	74	88	75	80	39	82	73
Social Media, Instant Messaging (e.g Facebook, WhatsApp, Twitter, LinkedIn)	62	55	70	100	72	59	63	35	0	59	64
Connecting my mobile phone to my mobile broadband service via Wi-Fi	60	59	61	67	71	61	57	35	23	60	60
Manage Banking/Pay Bills/Other Services	47	39	56	47	36	65	61	33	0	60	37
Purchasing goods/services	45	36	55	69	41	57	49	11	23	60	33
Using real time video/voice messaging (e.g. SKYPE, Viber, FaceTime)	43	32	54	74	51	44	41	13	0	60	30
Gaming	18	16	20	46	23	15	15	0	0	18	18
Downloading/streaming movies, music/TV programmes	17	12	22	57	18	18	11	0	0	21	14
Catch Up TV Services (Sky On Demand, RTÉ player)	10	10	11	46	14	7	4	0	0	20	3
Accessing paid for TV streaming services, such as NETFLIX	10	9	11	20	16	10	6	0	0	15	7
Working at home/Teleworking	7	6	7	0	12	8	0	9	0	10	4

(* small base)

Mobile broadband service is most commonly used for browsing the Internet (92%) and using email (77%). Usage patterns vary significantly across age categories.

(Q.67)

Use of mobile broadband service - II

(Base : All Mobile Broadband Subscribers – 103)

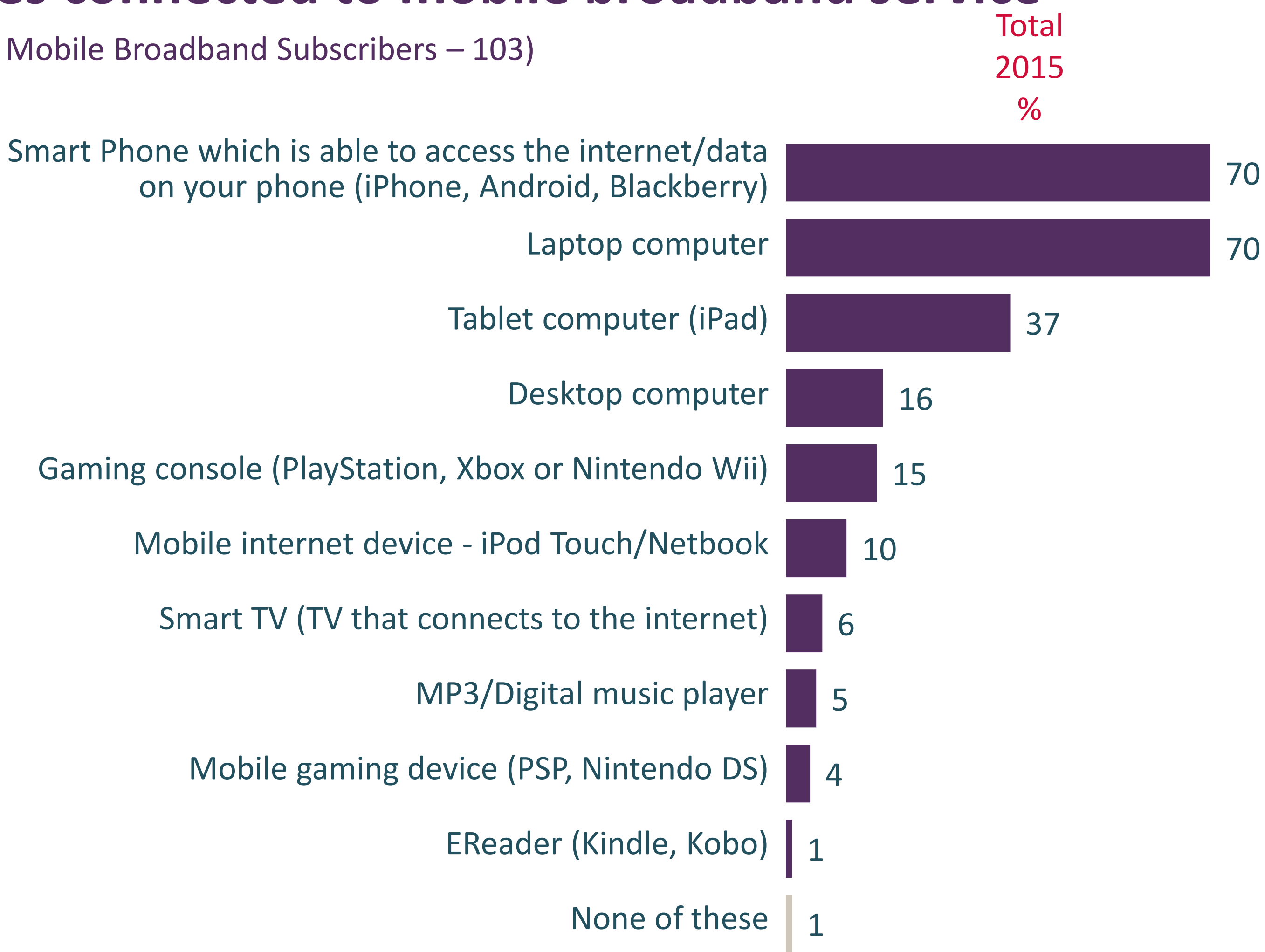
	Total %	Region: Dublin %	Total Urban %	Urban less Dublin %	Rural %
Browsing the internet	92	100	91	88	94
Using email	77	85	77	75	77
Social Media, Instant Messaging (e.g Facebook, WhatsApp, Twitter, LinkedIn)	62	72	69	68	55
Connecting my mobile phone to my mobile broadband service via Wi-Fi	60	72	63	60	57
Manage Banking/Pay Bills/Other Services	47	60	50	47	43
Purchasing goods/services	45	54	46	44	43
Using real time video/voice messaging (e.g. SKYPE, Viber, FaceTime)	43	87	49	38	36
Gaming	18	26	25	25	10
Downloading/streaming movies, music/TV programmes	17	26	23	23	10
Catch Up TV Services (Sky On Demand, RTÉ player)	10	27	13	9	8
Accessing paid for TV streaming services, such as NETFLIX	10	26	16	13	5
Working at home/Teleworking	7	14	7	5	7

Activities requiring higher speed mobile broadband service (e.g. downloading content) are cited less frequently by respondents from rural areas.

(Q.67)

Devices connected to mobile broadband service

(Base : All Mobile Broadband Subscribers – 103)

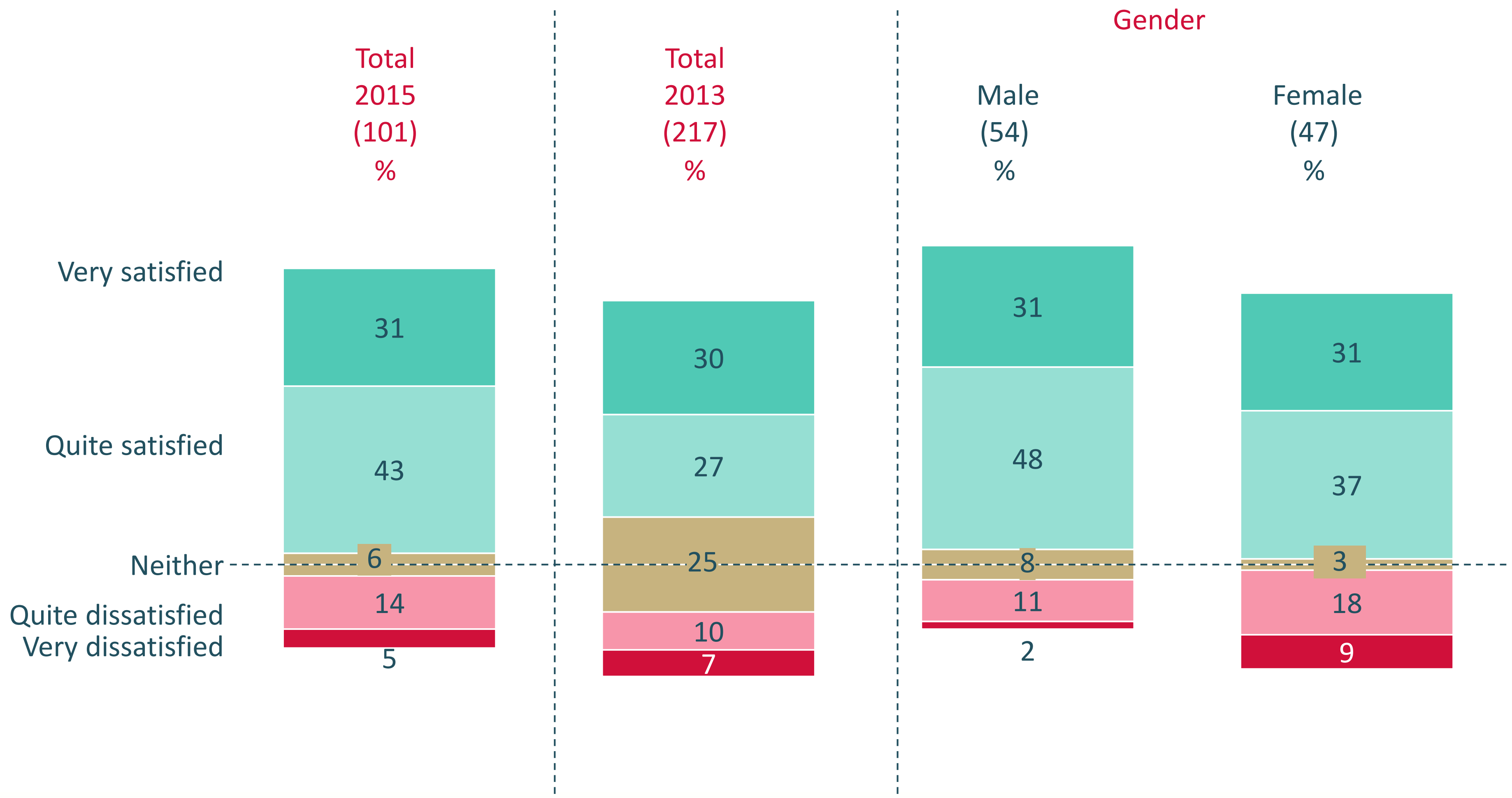


Smart Phones (70%) and Laptops (70%) are the devices most often connected to mobile broadband service.

(Q.66)

Satisfaction with mobile broadband service - I

(Base : All Mobile Broadband Subscribers – 103)

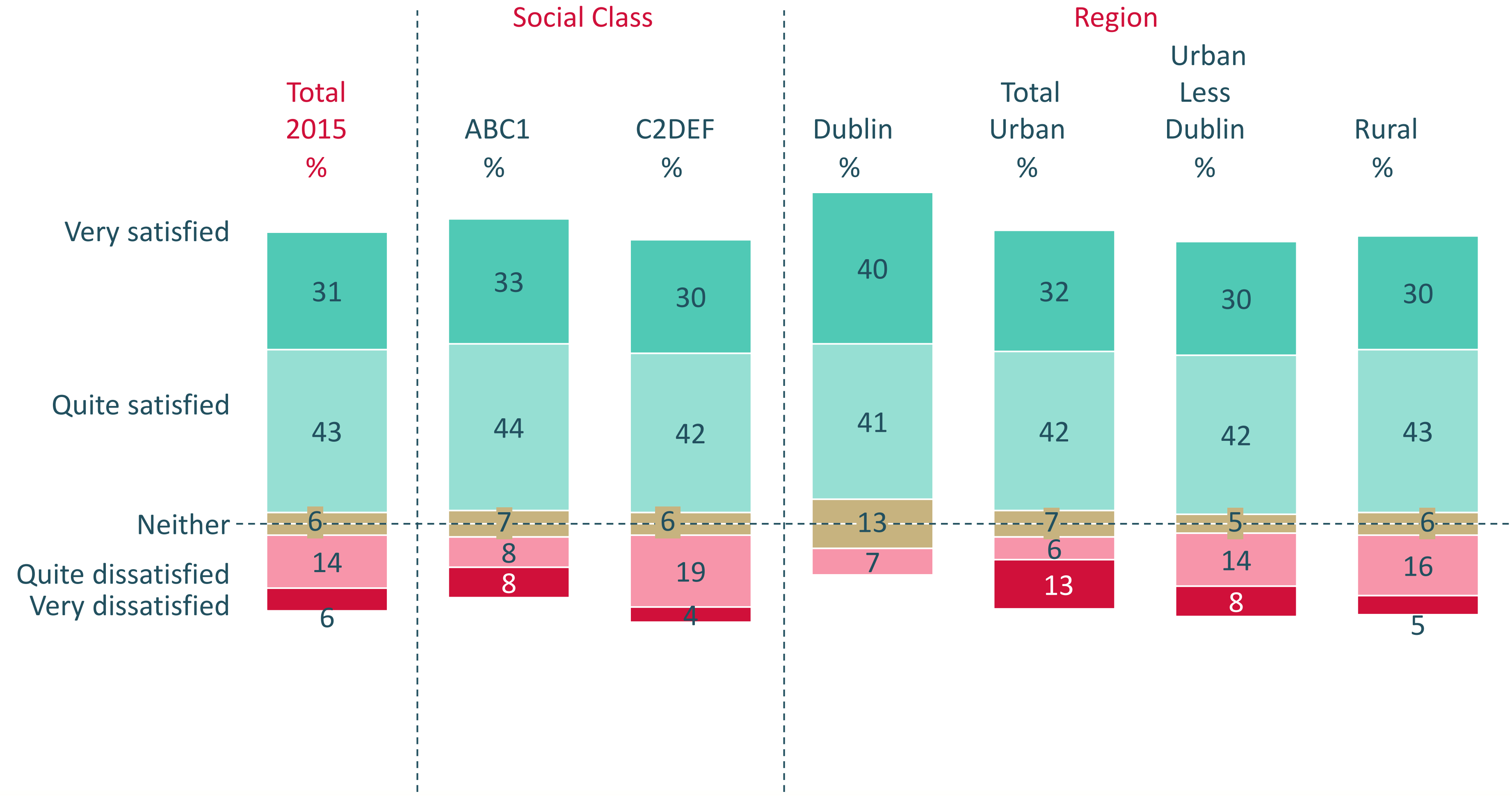


*SMALL BASE

Satisfaction with mobile broadband service is 74% in 2015 compared to 57% in 2013.

Satisfaction with mobile broadband service - II

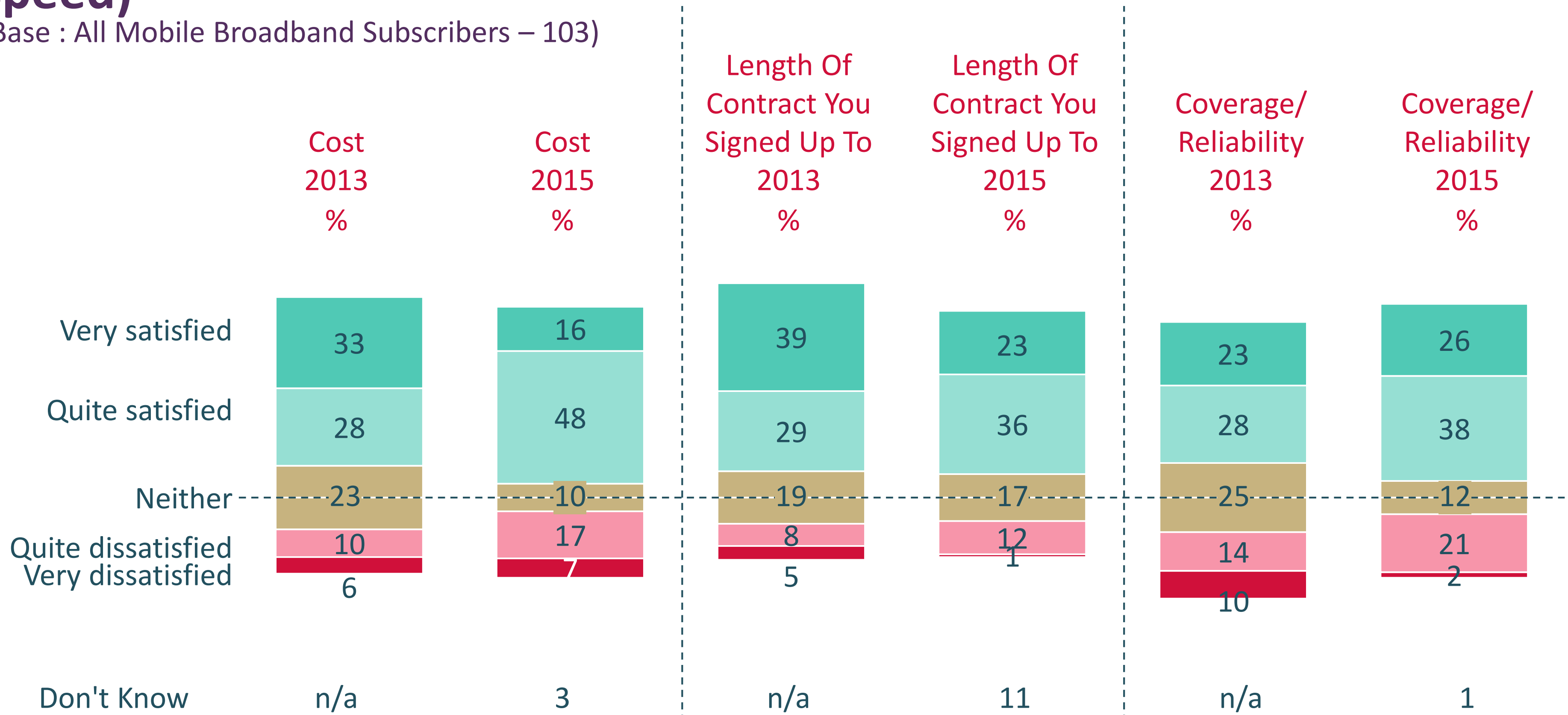
(Base : All Mobile Broadband Subscribers – 103)



Satisfaction with mobile broadband service is highest in Dublin at 81%

Satisfaction with elements of mobile broadband service: summary (cost, length of contract, coverage/reliability, actual speed)

(Base : All Mobile Broadband Subscribers – 103)



Net Satisfaction %							
	Urban	62	73	73	59	53	75
	Rural	60	55	64	57	49	53

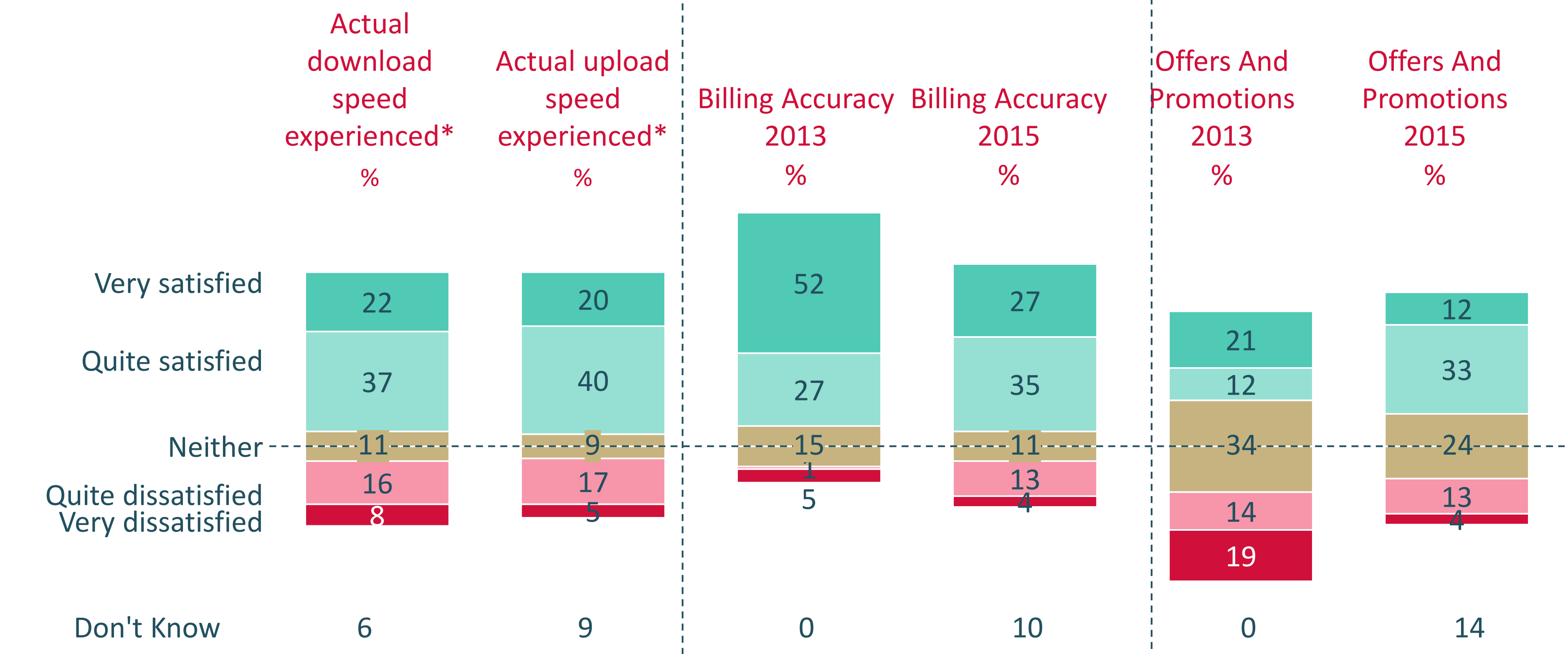
Satisfaction has increased with cost and coverage/reliability aspects of mobile broadband service compared to 2013.

REDC

(Q.65b)

Satisfaction with elements of mobile broadband service: summary (actual speed, billing and offers/promotions)

(Base : All Mobile Broadband Subscribers – 103)



Net Satisfaction %							
	Urban	65	66	79	68	35	51
	Rural	53	55	80	57	32	39

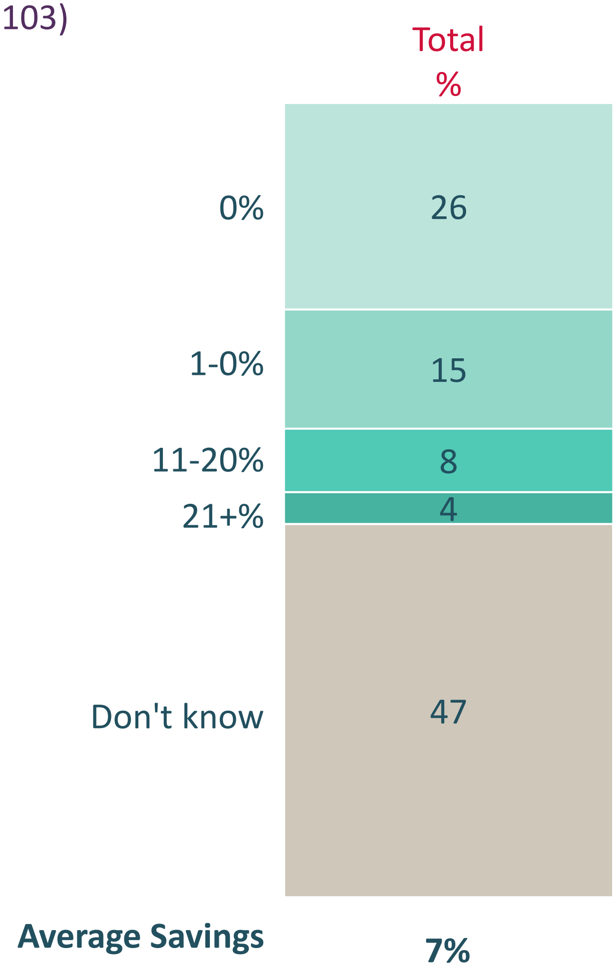
Satisfaction has decreased with billing accuracy of mobile broadband service compared to 2013.

* 2015 only

(Q.65b)

Perceived percentage savings on monthly bill if searched for better deal?

(Base : All Mobile Broadband Subscribers – 103)

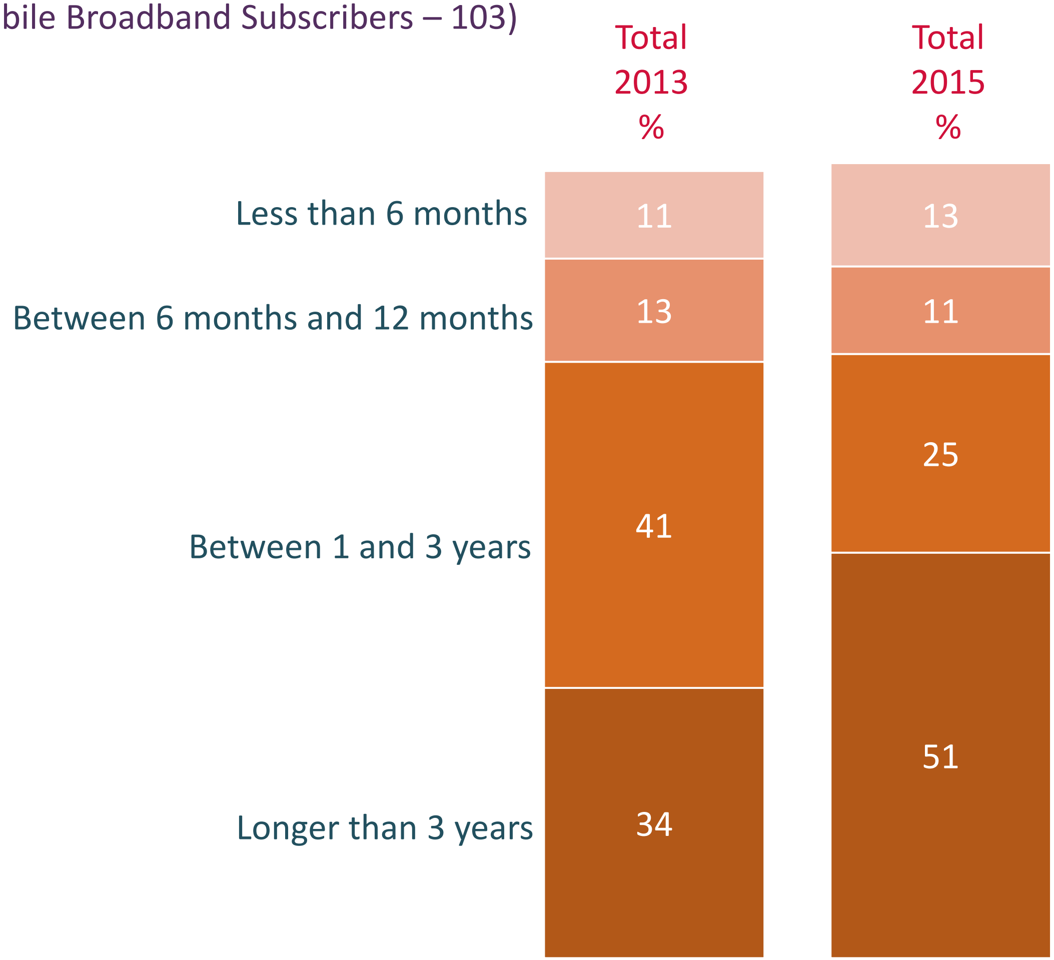


26% of mobile broadband service subscribers expect to receive no savings if they search for the best deal while a further 47% don't know what savings they might receive.

(Q.72)

Length of time subscribed to mobile broadband service provider

(Base : All Mobile Broadband Subscribers – 103)



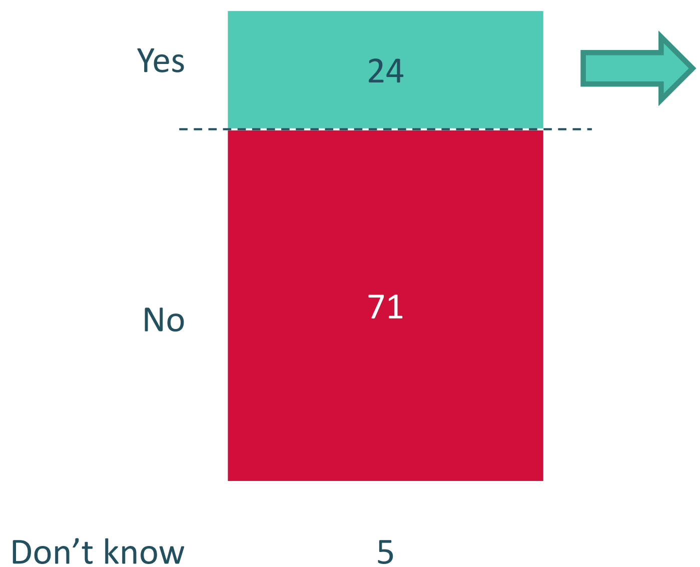
The average length of time purchasing mobile broadband service from the same service provider has increased since 2013.

(Q.73)

Incidence of previously purchasing mobile broadband service from another supplier & reasons for switching

(Base: All Mobile Broadband Subscribers - 103)

Total
2015
%



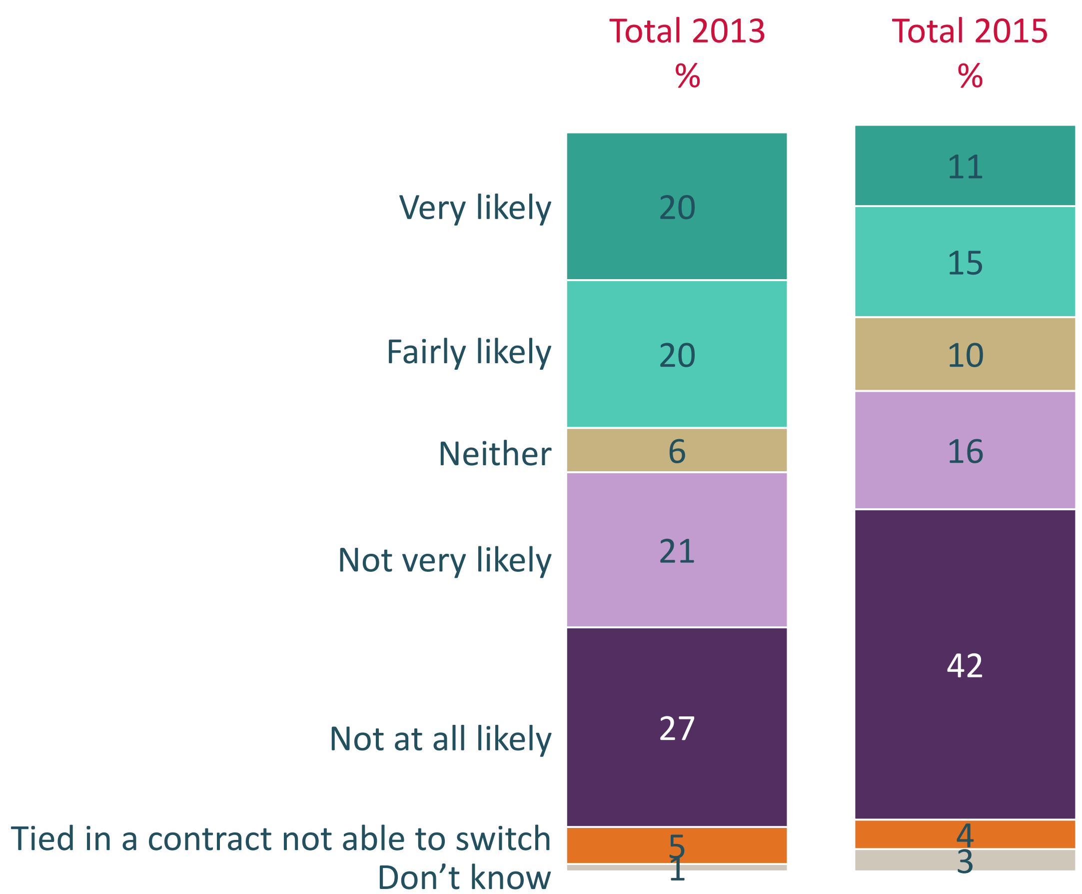
	Total 2015 (n= 13*) %
Better price than my previous service provider	58%
Good customer service	30%
Only provider available in my area	23%
I saw an advertisement	16%
Promised speed of internet	13%
Any mention - special offer/promotion	13%
It was part of a bundled offer	5%
Was contacted by the service provider	5%
Other	10%

*Base Size is Small

24% of all mobile broadband users switched provider, with price (58%) and good customer service (30%) being the main reasons for switching.

Likelihood to switch mobile broadband service provider within the next 12 months

(Base : All Mobile Broadband Subscribers - 103)

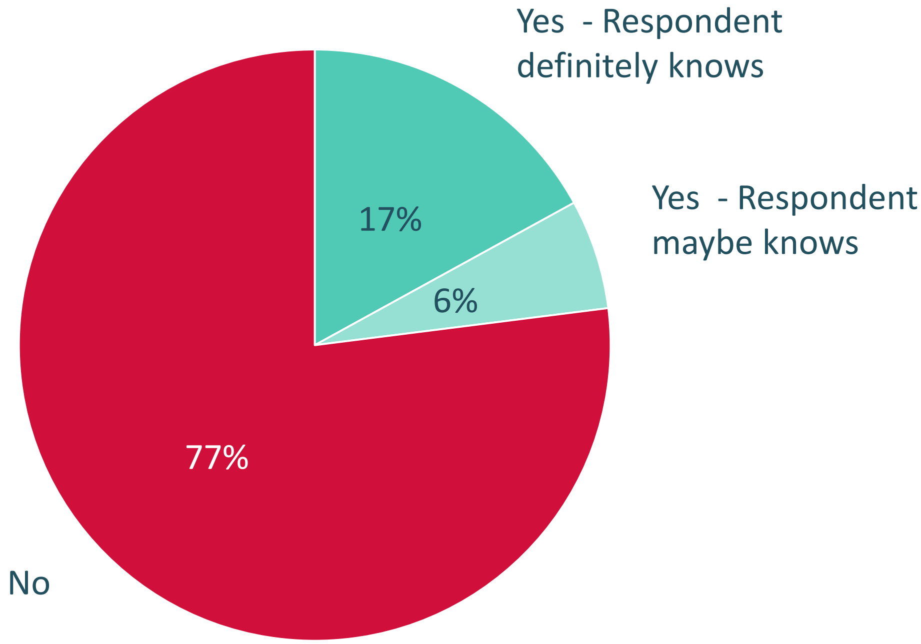


Likelihood to switch mobile broadband service provider in 2015 is lower compared to 2013 (26% in 2015 versus 40% in 2013)

(Q78)

Awareness of mobile broadband service download speeds

(Base : All Mobile Broadband Subscribers – 103)

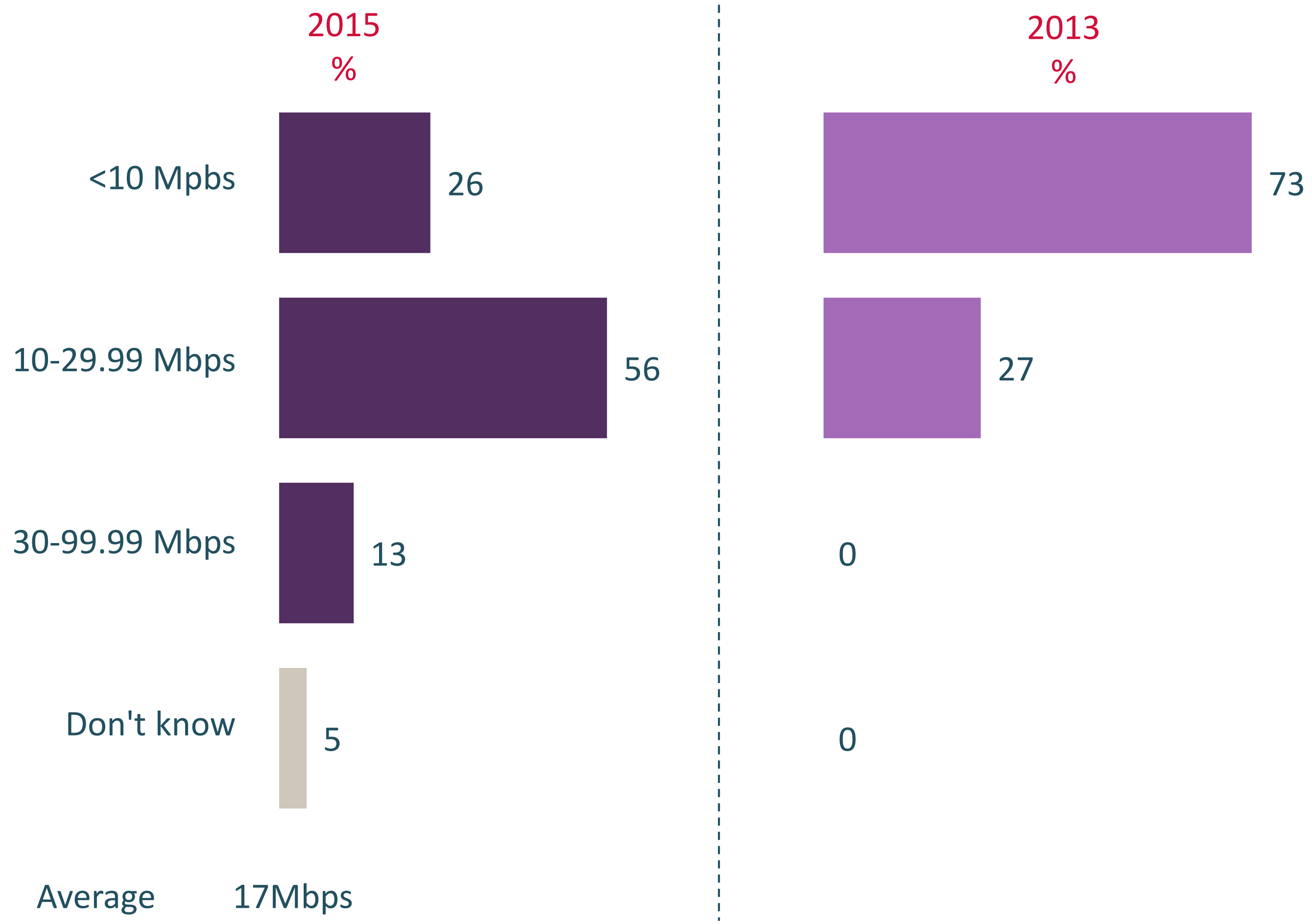


23% of mobile broadband service subscribers are aware of the maximum 'up to' download speed of their mobile broadband service.

(Q.79)

Stated maximum download speed

(Base: All Aware Of Download Speed – 24*)



*Base Size is Small

Average speed of mobile broadband service has increased since 2013.

(Q.80)

TV

How does household watch TV or access TV services – (main access)

(Base: All Decision Makers – 1,039)

Q.9a How, if at all, do you and your household mainly watch TV or access TV services?

			Area -2015				Social Class -2015	
	Total 2015 %	Total 2013* (848) %	Dublin (291) %	Total Urban (665) %	Urban Less Dublin (374) %	Rural (374) %	ABC1 (426) %	CDEF (613) %
Sky	49	53	27	44	57	59	51	49
UPC (NTL/Chorus)	23	29	59	34	15	2	29	18
Saorview	19	9	3	12	19	31	11	24
Freesat	2	6	1	2	3	2	2	2
Eircom/eVision	2	1	4	2	1	1	3	2
Saorsat	*	*	1	1	*	*	*	1
Netflix or similar	*	n/a	*	1	1	0	*	1
Polish TV	*	n/a	0	*	1	1	*	1
Chromecast TV	*	n/a	*	*	0	0	*	0
Others	1	2	1	1	1	2	1	1
No TV subscription	2	n/a	3	2	2	2	2	2
None/No others	*	3	1	*	0	*	*	*

** = less than 1%*

**Question wording changed from 2013*

49% of respondents purchase Sky's TV services, with this figure rising to 59% in rural areas.

How does household watch TV or access TV services – (main access)

(Base: All Decision Makers – 1,039)

Q.9a How, if at all, do you and your household mainly watch TV or access TV services?

	Total 2015 %	Total 2013 (848) %	Age -2015					
			18-24 (73) %	25-34 (229) %	35-44 (197) %	45-54 (218) %	55-64 (145) %	65+ (177) %
Sky	49	53	52	57	55	53	41	35
UPC (NTL/Chorus)	23	29	21	17	24	22	24	29
Saorview	19	9	13	17	12	17	25	30
Freesat	2	6	2	1	2	3	2	1
Eircom/eVision	2	1	0	*	3	1	4	3
Saorsat	*	*	0	0	1	0	1	2
Netflix or similar	*	n/a	3	0	0	1	0	0
Polish TV	*	n/a	1	1	1	1	0	0
Chromecast TV	*	n/a	0	*	0	0	0	0
Others	1	2	1	2	1	1	1	*
No TV subscription	2	n/a	6	5	1	2	1	0
None/No others	*	3	1	0	0	*	1	0

** = less than 1%*

Respondents aged 18-34 are more likely to be without TV subscription.

How does household watch TV or access TV services – (secondary access)

(Base: Base : All Decision Makers – 1,039)

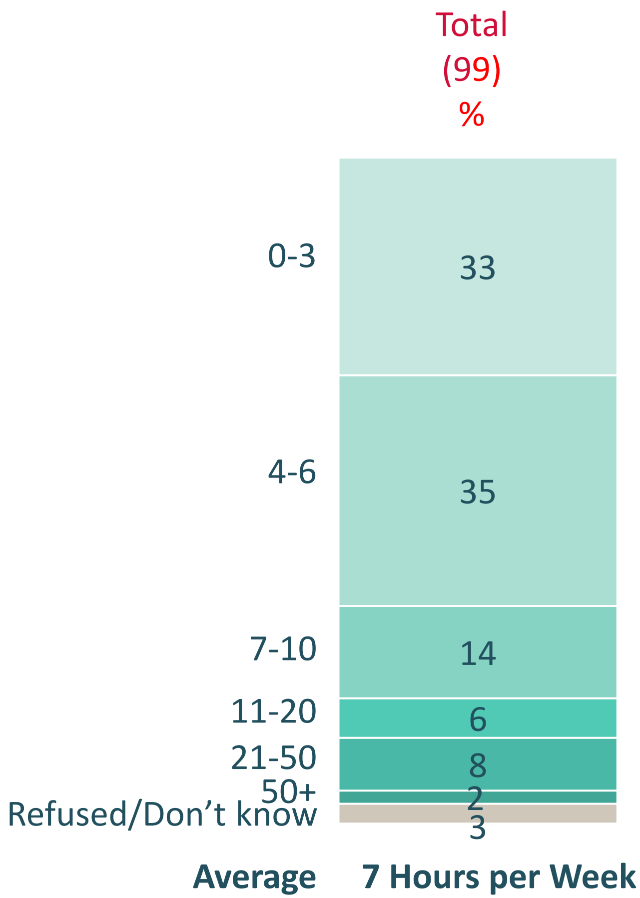
Q9b - Are there other ways by which you and your household currently watch TV or access TV services?

	Total 2015 %	Area -2015			
		Dublin (289) %	Total Urban (663) %	Urban Less Dublin (374) %	Rural (373) %
Netflix	9	18	13	9	3
Saorview	6	0	4	8	8
Catch Up Players	4	1	4	7	4
Freesat	4	0	2	4	7
Apple TV	1	3	2	1	*
Chromecast TV	1	0	1	1	*
Sky	1	*	1	1	1
Saorsat	*	0	*	1	*
Magnet	*	*	*	0	0
Eircom/eVision	*	0	*	*	0
Access TV through the internet	1	*	1	1	1
Others	*	0	*	*	*
No others	78	81	78	75	79

18% of respondents in Dublin use Netflix compared to 9% of respondents nationally.

Hours spent on Netflix on a weekly basis

(Base: All Netflix Users - 99)

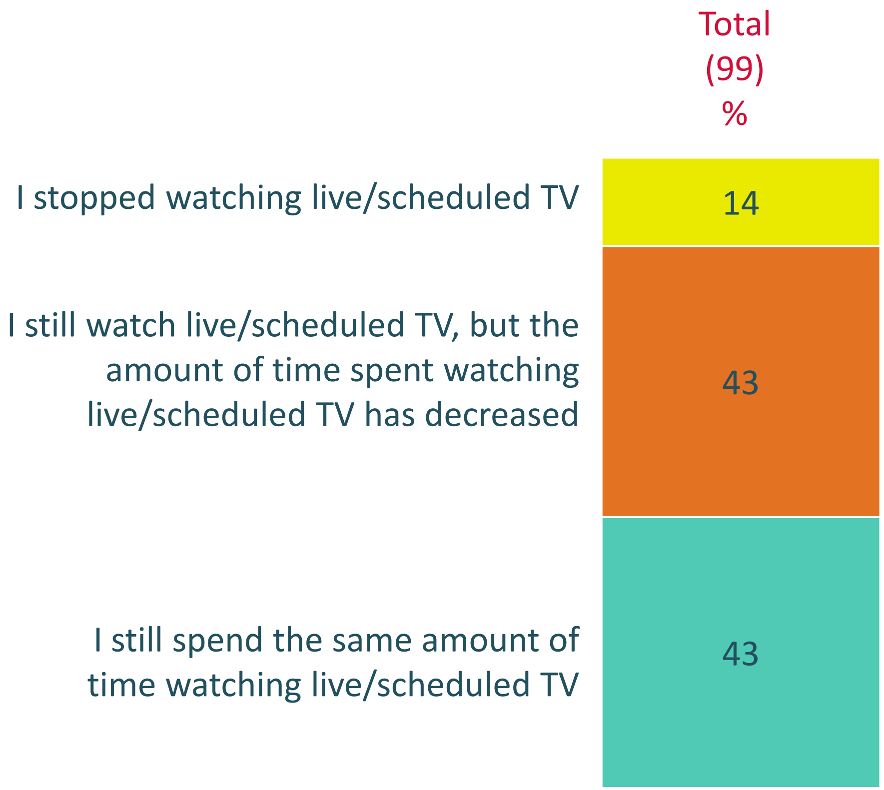


On average, Netflix users spend 7 hours per week using Netflix services

Impact of online/streaming services on time spent watching live/scheduled TV

(Base: All Netflix Users - 99)

Q.11 Has the usage of online paid for TV streaming services, such as NETFLIX impacted the amount of time spent watching live/scheduled TV?

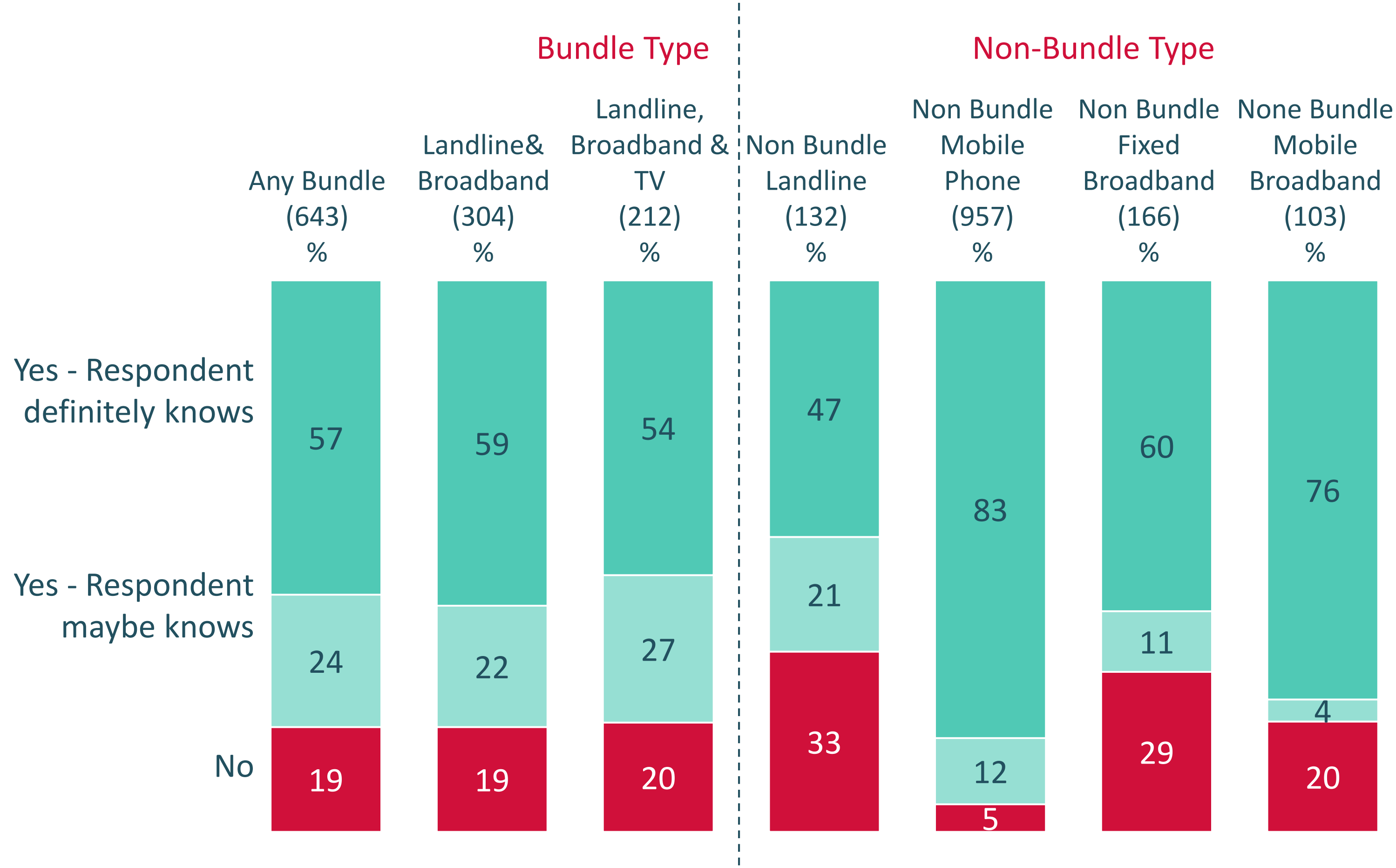


14% of Netflix users claimed to have stopped watching live/scheduled TV while 86% watch at least some live/scheduled TV.

Cost Awareness & Overcharging

Purchased services cost awareness

(Base: All With Bundle - 643 / Without Bundle -396)

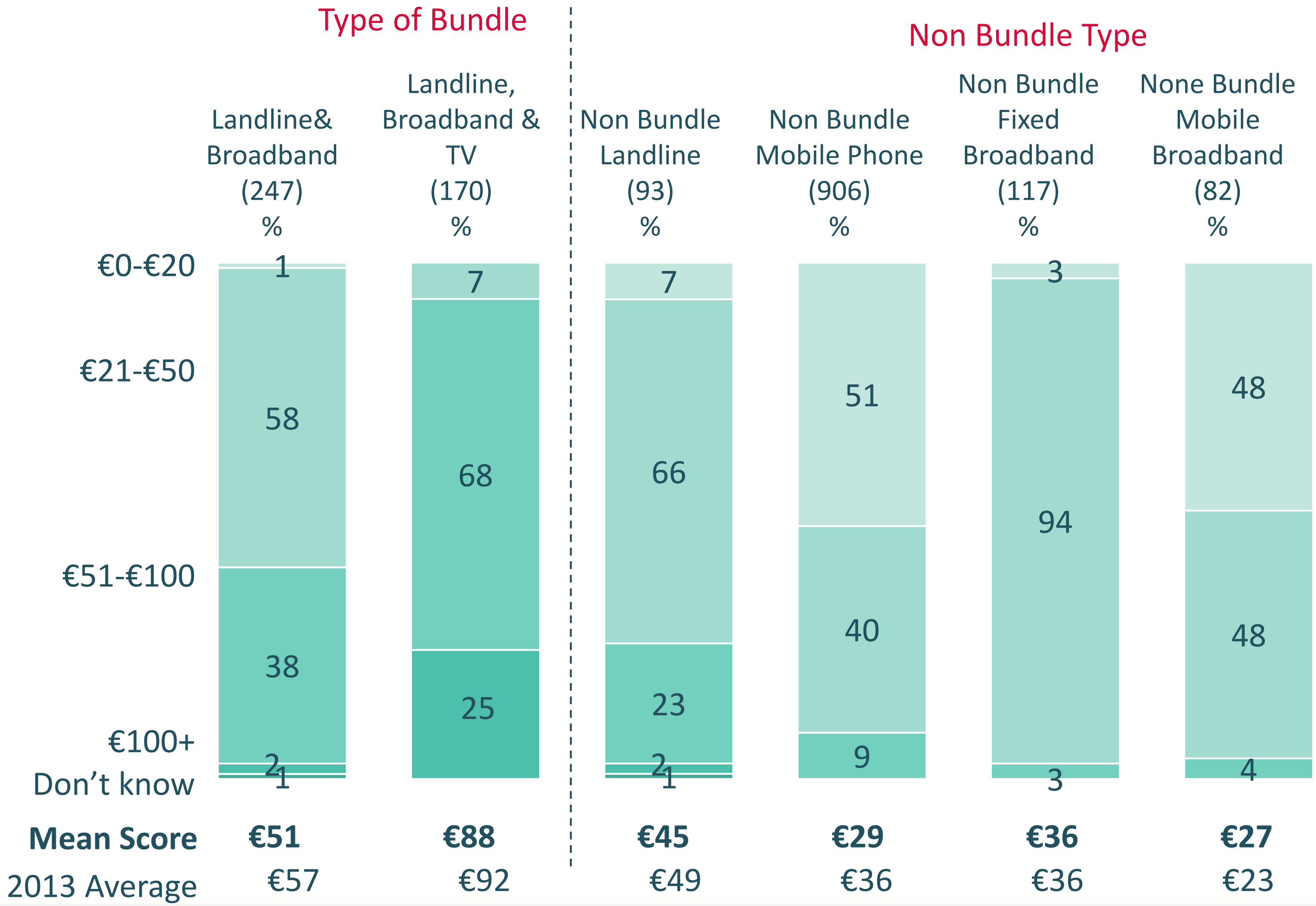


(Q14a/Q20B/Q36b/Q50b/Q71b)

Cost awareness is generally high across all types of services. Cost awareness is highest among non bundle mobile phone subscribers with 83% saying they definitely know the cost of their mobile phone service.

Actual cost of service

(Base: All With Bundle (who know the cost) – 239 & All Non Bundle Who Know Cost)

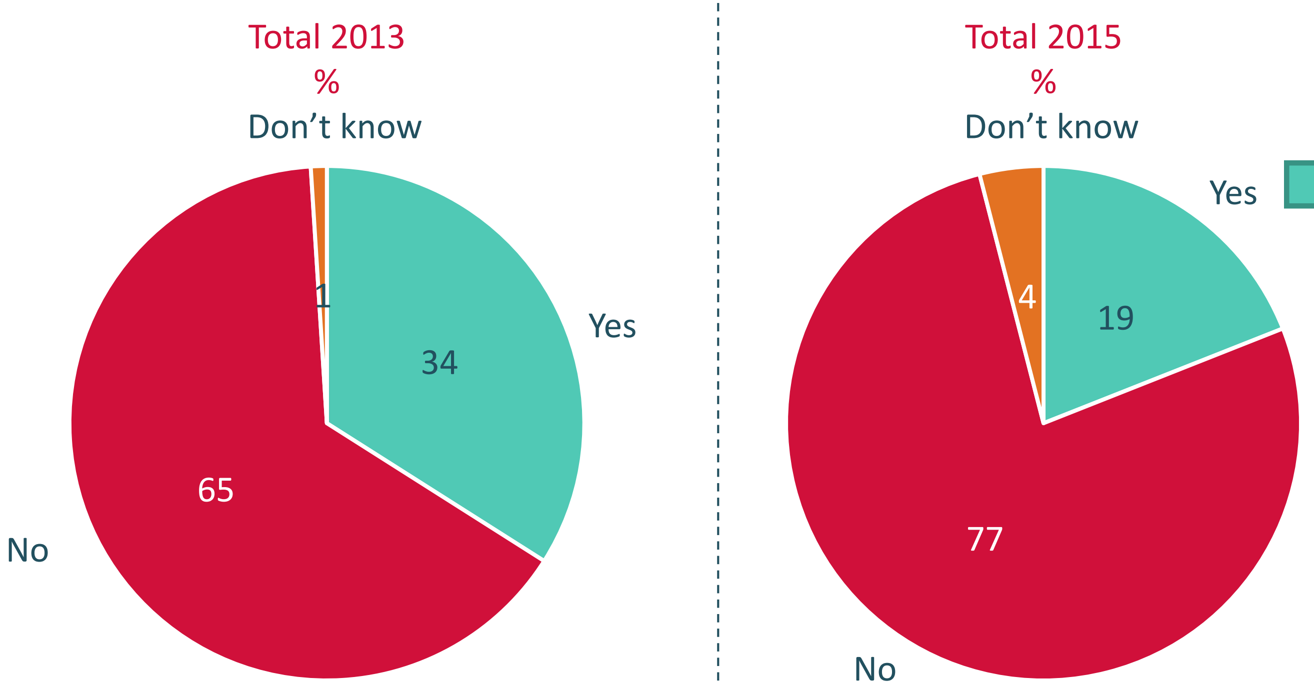


(Q14b/Q21B/Q36b/Q50b/Q71b)

Stated average monthly cost of services in 2015 is slightly lower compared to service costs stated in 2013 with the exception of mobile broadband service costs.

Incidence of received a higher than expected bill

(Base : All Adults 18+ - 1,039)

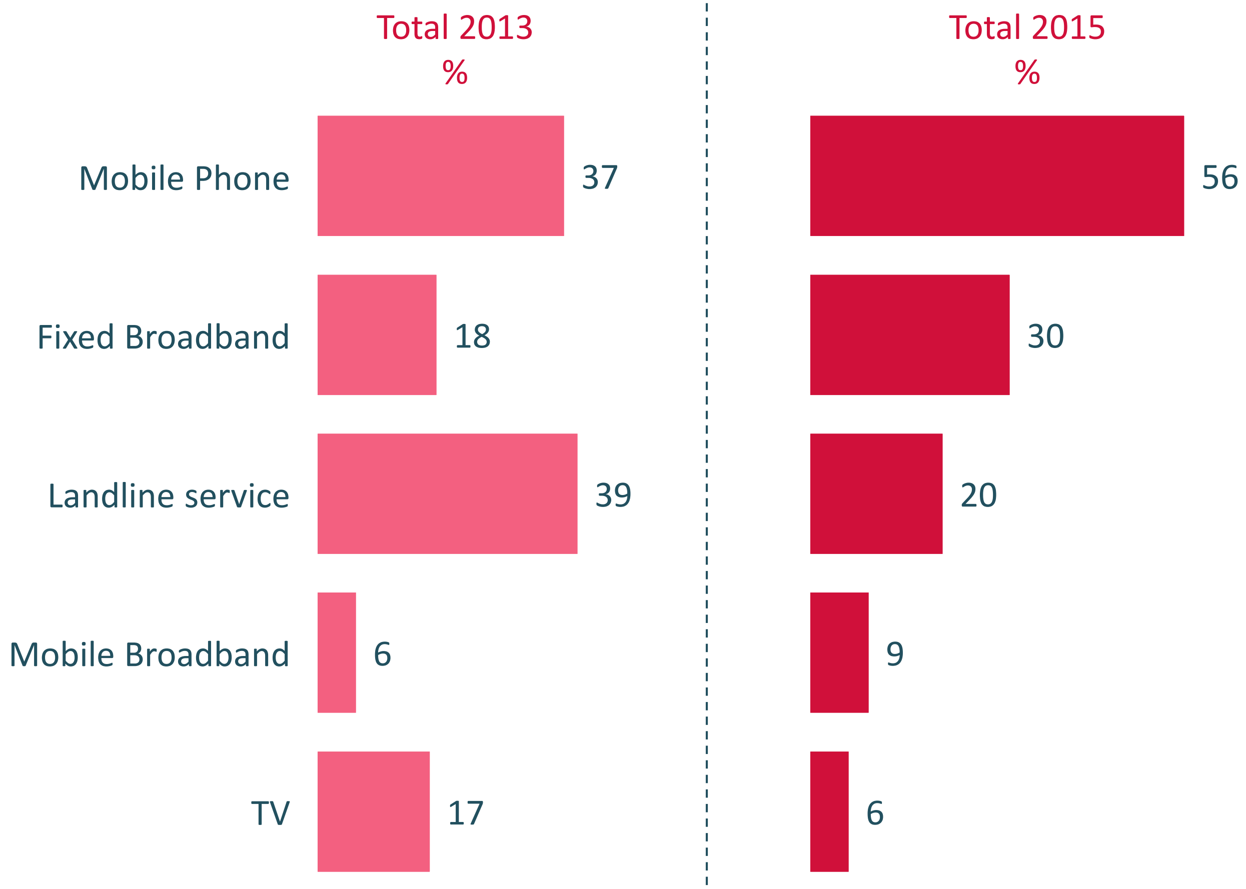


Yes x Service Provider	
Vodafone	21%
Three	20%
Sky	19%
Eircom	18%
UPC	15%

19% of survey respondents claimed that they received a higher than expected bill compared to 34% in 2013.

Which service did this bill relate to?

(Base : All Who Had A Higher Than Expected Bill - 203)

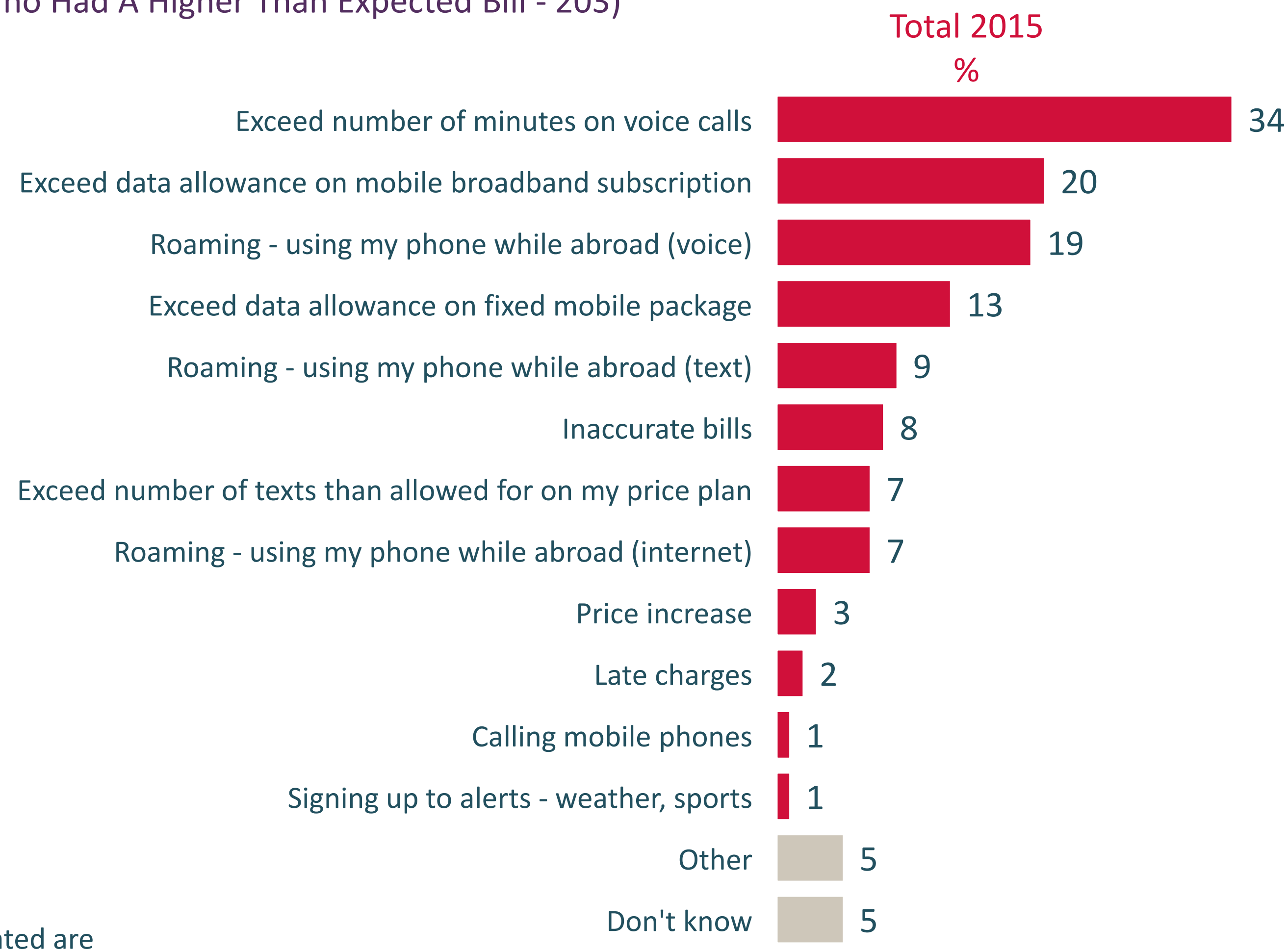


Incidence of receiving higher than expected bills is highest among mobile phone service subscribers.

(Q.84)

Reasons for receiving higher than expected bill

(Base : All Who Had A Higher Than Expected Bill - 203)



*2013 reasons stated are not comparable

Most commonly cited reasons for receiving higher than expected bills are exceeding allotted voice call minutes allowance (34%), followed by exceeding allotted data allowance (20%) and roaming charges (19%).

Net Satisfaction x Incidence of Receiving a Bill Higher than Expected

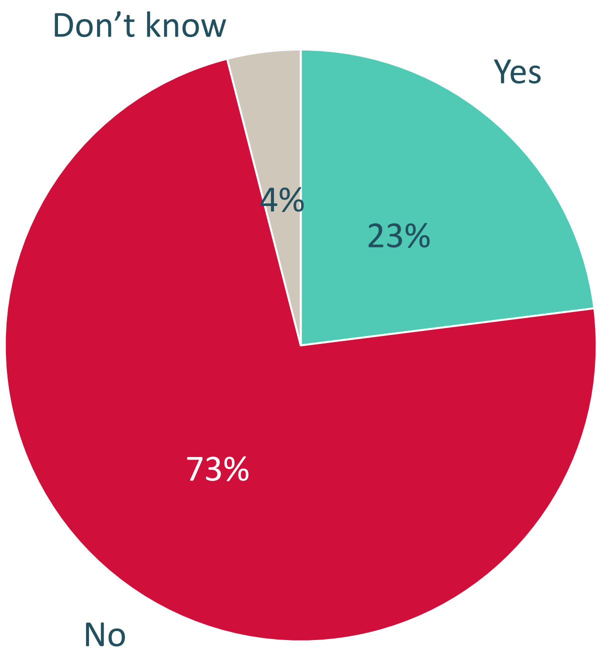
Net Satisfaction	%	Overcharged	
		Yes	No
Landline	85	77	86
Mobile Phone	90	79	92
Fixed Broadband	86	77	88
Mobile Broadband	74	65	77

Those who did not receive higher than expected bill for any service have a higher satisfaction with their service provider compared to those who thought they were overcharged.

Incidence of being in receipt of household allowance

(Base: All Adults 18+ - 1,039)

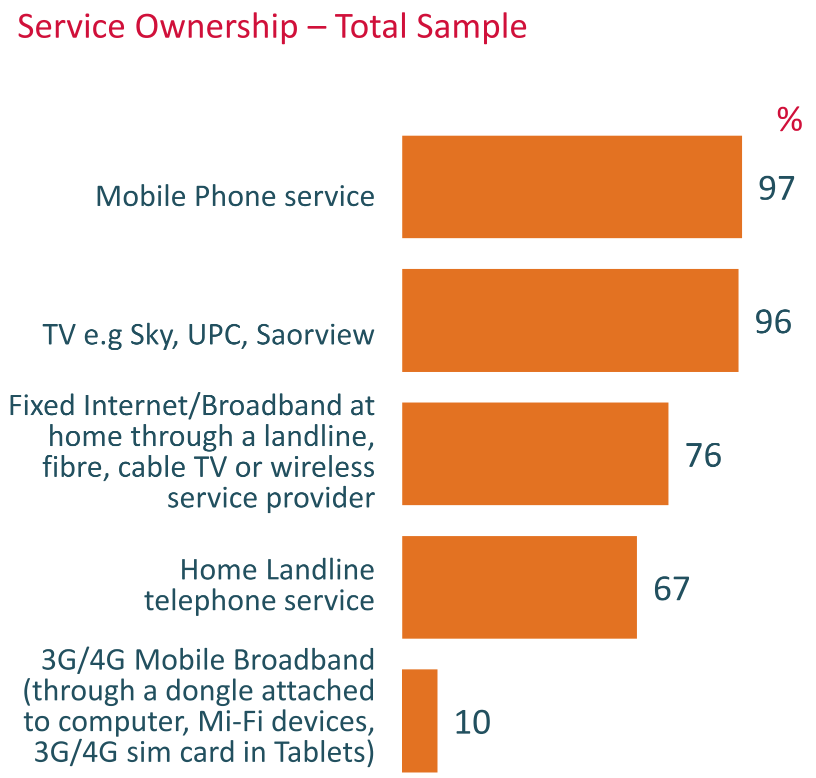
C.12 Finally, can I ask you are you currently in receipt of any (household benefits package, disability allowance, welfare payment, carer's allowance)?

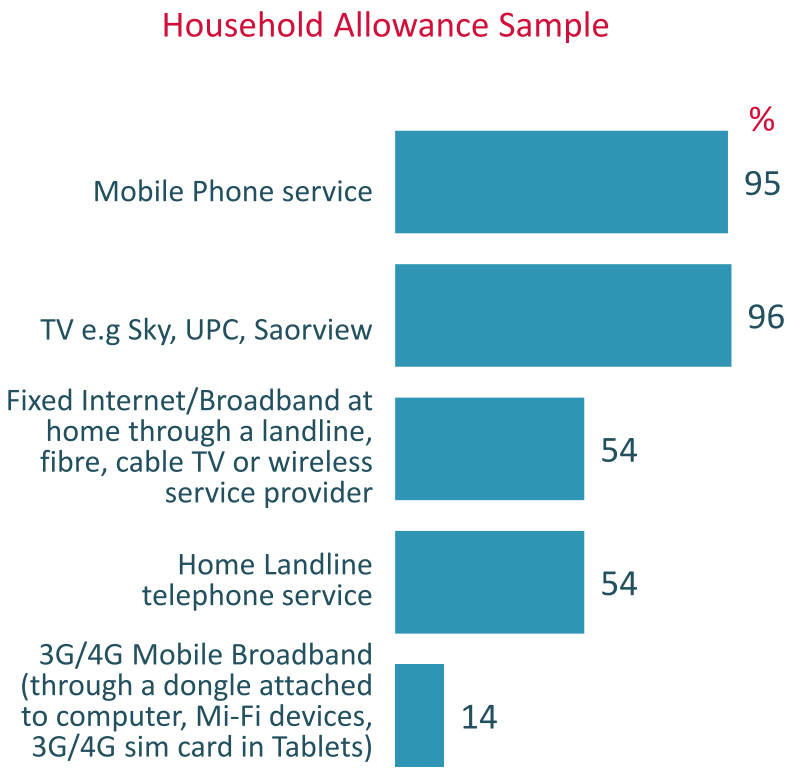


23% of households are in receipt of some sort of household allowance.

Service ownership

(Base: All Respondents In Receipt Of Household Allowance – 259)





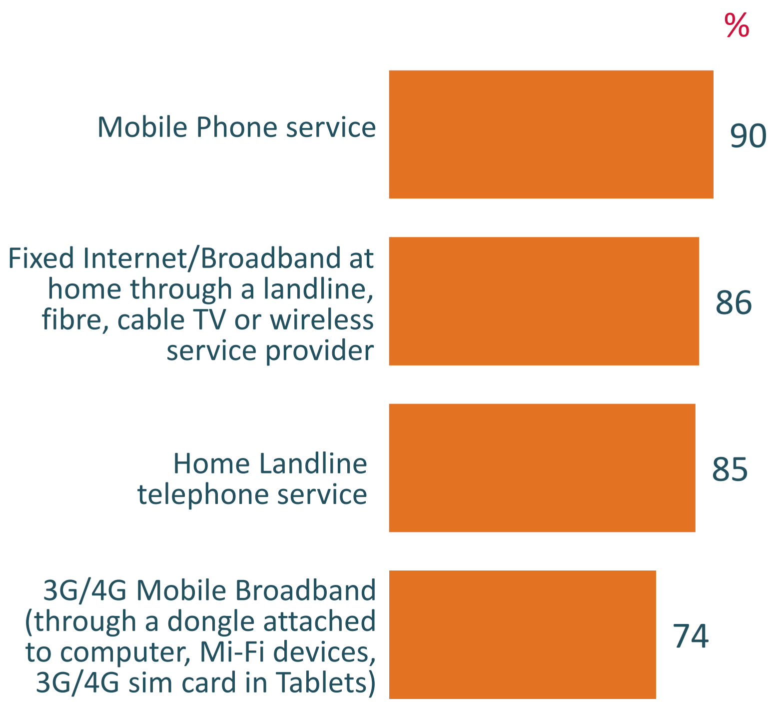
*satisfaction & cost questions not asked for TV services

Ownership of fixed broadband and home landline services is significantly lower compared to ownership rates among the rest of the survey respondents sample.

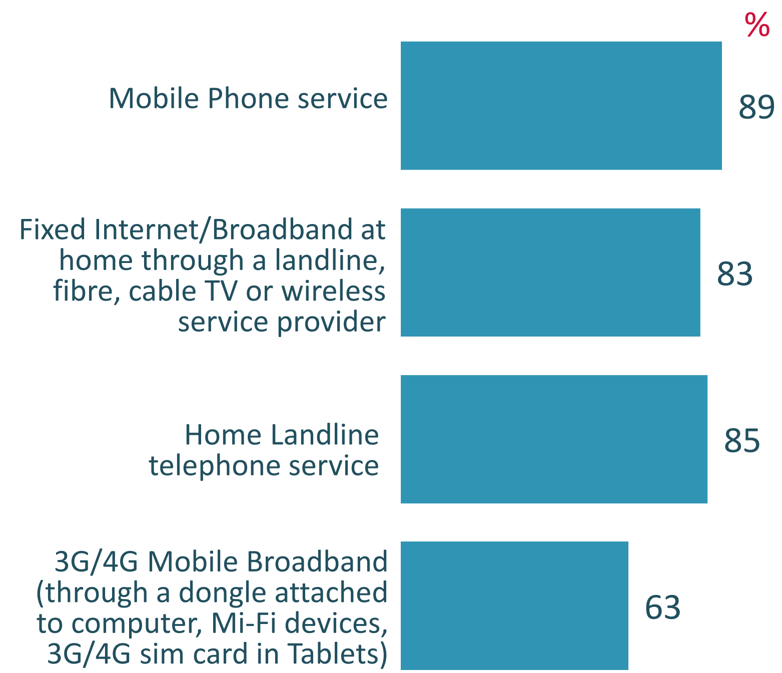
Satisfaction with service provider

(Base: All Respondents In Receipt Of Household Allowance – 259)

Satisfaction – Total Sample



Household Allowance Sample



*satisfaction & cost questions not asked for TV services

Satisfaction with service providers among respondents receiving household allowance is broadly similar to satisfaction levels cited by the rest of respondents with the exception of mobile broadband service.

Average spend on services

(Base: All Respondents In Receipt Of Household Allowance – 259)

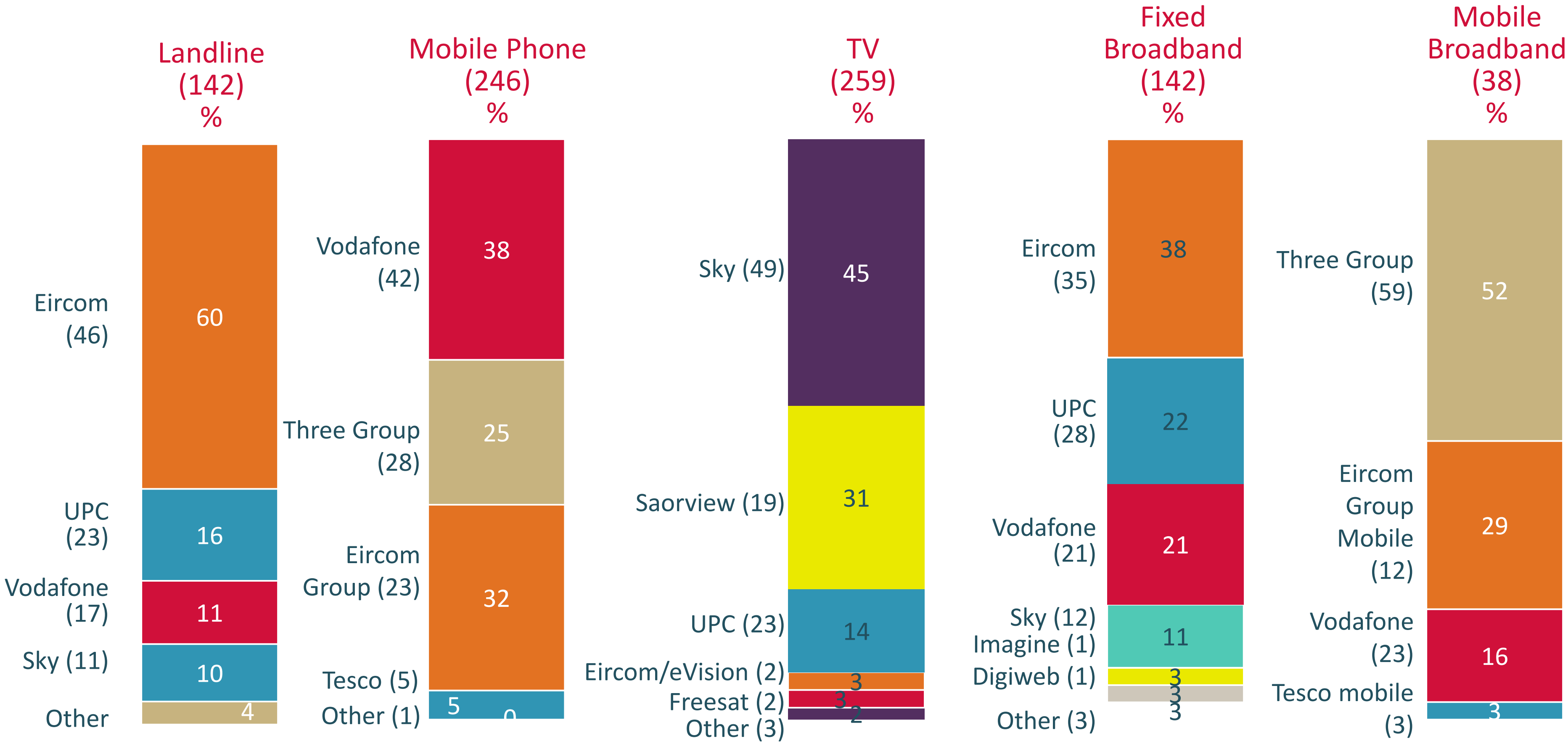
Cost of services	Home landline (34*) %	Mobile (233) %	Fixed broadband (30*) %	Mobile broadband (28*) %
€0-20	7	70	4	57
€21-50	74	25	92	43
€51-100	17	5	4	0
€100+	2	0	n/a	n/a
Don't know	0	0	n/a	n/a
Average Cost (Household Allowance Recipients)	**€40**	**€24**	**€36**	**€24**
Average Cost (Total Sample)	**€45**	**€29**	**€36**	**€27**

(* Small base)

Average spend is lower for each service among those who receive household allowance.

Recipients of household allowance - service provider.

(Base: All Respondents In Receipt Of Household Allowance – 259)



() Total Sample

Eircom's share in landline significantly higher among those in receipt of household allowance

Appendix – Questionnaire

REDC

CONSUMER ICT SURVEY 2015

CLASSIFICATION SECTION

C.1 Can I check you are responsible or jointly responsible for the selection of telecommunications supplier and/or pay the telecommunications bills for your **household**?

C.2 Record Respondents Gender

C.3 Would you mind telling me your age?

C.4 What is the occupation of the head of household?

C.5 In which area of Dublin do you live?

SERVICE AND DEVICE OWNERSHIP

Q.1a Which of the following telecommunications/broadcasting services do you currently have access to in your home?

1. Home Landline telephone service
2. Mobile Phone service
3. 3G/4G Mobile Broadband (through a dongle attached to computer, Mi-Fi devices, 3G/4G sim card in Tablets)
4. Fixed Internet/Broadband at home through a landline, fibre, cable TV or wireless service provider
5. TV e.g – Sky, UPC, Saorview

None of these

Q.1b You mentioned that you have access to 3G/4G mobile broadband. Can you look at this picture of how mobile broadband is typically provided and confirm you have one of these devices in your home?

Yes
No

Non Broadband Access

Q.2a Do you generally know how much access to Internet/broadband service costs on a monthly basis?

YES – RESPONDENT DEFINITELY KNOWS
YES – RESPONDENT MAYBE KNOWS
NO
DON'T KNOW

Q.2b Why do you currently not have access to the Internet/Broadband in your home?

Internet/Broadband service is not available in the area that I live in
Access Internet over Smartphone instead
Installation/connection charges are too high

The recurring monthly price of broadband service is too expensive
Price of Computers/other personal devices that can be connected to broadband is too expensive
I do not know how to use devices that can be connected to broadband (e.g. computer)
Use broadband at work/elsewhere
Not interested in/don't need/use broadband at home
Worried about security/ID theft
Other – please specify

Q.3 If you could subscribe to a home broadband service at a price you consider acceptable, would you do so?

Yes
No
Don't know/refused

Q.4a At what monthly price would you consider a home broadband subscription to be "too expensive to consider?

Response: _____
DON'T KNOW

Q4.b At what monthly price would you consider a home broadband subscription to be "getting expensive, but still worth the cost?"

Response: _____
Don't Know

Q.4c Now, at what monthly price would you consider a home broadband subscription to be "a bargain, definitely worth the money"?

Response: ____
Don't Know

Q.4d And at what monthly price would you consider a home broadband subscription to be "so inexpensive that you would question the quality of the service and not consider subscribing?"

Response: _____
Don't Know

BRAND USAGE AND SERVICE COSTS

Q.5 What company do you currently use as your main provider for your <u>home landline telephone service</u>?

Q.6a What company do you currently use as your main <u>mobile phone</u> provider?

Q.6b What other company, if any, do you currently use as your <u>mobile phone</u> provider?

Q.7 What company do you currently use as your main <u>mobile broadband</u> provider?

Q.8 What company do you currently use as your main <u>fixed home broadband</u> provider (landline/cable or wireless)?

Q.9a How, if at all, do you and your household mainly watch TV or access TV services?

Sky
UPC (NTL/Chorus)
Saorview
Saorsat
Eircom/eVision
Magnet
Freesat
Netflix
Catch Up Players (RTE Player/TV3 Player)
Apple TV
Chromecast TV
Access TV through the internet (please specify ....)
Others (please specify)
None

Q.9b Are there other ways by which you and your household currently watch TV or access TV services?

Sky
UPC (NTL/Chorus)
Saorview
Saorsat
Eircom/eVision
Magnet
Freesat
Netflix or similar
Catch Up Players (RTE Player/TV3 Player)
Apple TV
Chromecast TV
Access TV through the internet (please specify)
Others (please specify)
Do not have a TV subscription
None

Q.10 How many hours per week do you use online subscription based TV streaming services, such as NETFLIX?

Q.11 Has the usage of online paid for TV streaming services, such as NETFLIX impacted the amount of time spent watching live/scheduled TV?

Bundles

Q.12 I would like you to think back TO when you last purchased any one of the following services (INSERT AS RELEVANT – HOME LANDLINE/MOBILE Phone/Mobile Broadband/Fixed Broadband/TV). Did you purchase more than one of these services as part of an overall single price?
Yes
No
Don't Know

Q.13a Which of these bundle options, if any, do you currently have in your home with the same provider?

Landline, TV, broadband & mobile phone
Landline, broadband & mobile phone
Landline, broadband & TV
Broadband & TV
Broadband & mobile phone
Broadband & landline
Landline & mobile
Landline & TV
Mobile & TV
Mobile & Broadband & TV

Q.13ai You mentioned that you have bundle types (insert options listed Q13a) which one of these bundle would you rely on most within your household.

Landline, TV, broadband & mobile phone
Landline, broadband & mobile phone
Landline, broadband & TV
Broadband & TV
Broadband & mobile phone
Broadband & landline
Landline & mobile
Landline & TV
Mobile & TV
Mobile & Broadband & TV

Q.13b You mentioned that you have bundle type (insert bundle type Q13a) however at Q1a you mentioned that you did not have (insert relevant option) can you confirm if you do or do not have access to this service

1. YES
2. NO

Q.14a Do you know how much you and your household pay for your **<<INSERT MAIN BUNDLE >>** on a monthly basis?

YES – RESPONDENT DEFINITELY KNOWS
YES – RESPONDENT MAYBE KNOWS
NO

Q.14b How much do you pay per month for these services?

Landline, TV, broadband & mobile phone
Landline, broadband & mobile phone
Landline, broadband & TV
Broadband & TV
Broadband & mobile
Broadband & landline
Landline & mobile
Landline & TV
Mobile & TV
Mobile & Broadband & TV
Don't Know

Q.14c How long ago did you subscribed to (BUNDLE TYPE Q13a/Q13ai).

Q.14d When you subscribed to (bundle type Q13a/Q13ai) did you move from one service provider to another to avail of this bundle?

Yes - switcher
No – non switcher
Don't Know/Can't remember

Q.15 Why did you select (SCRIPTER: Q13a/Q13ai BUNDLE TYPE) within the past year?

Competitive Price
Saw Advertising
Word of Mouth
Only option available in my area
I was approached by my current service provider
Promised speed of broadband service
Any mention – special offer/promotion
No hidden charges
Other – please specify
Don't know/Can't remember

Q.16a What percentage saving on your current monthly bill for bundle (Q13a/Q13ai BUNDLE TYPE) do you think you could receive if you put in the time and effort to search for the best deal?

Q.16b What percentage saving on your current bundle, if any, **did you expect to receive** when you switched providers?

Q.16c What percentage saving on your current bundle, if any, did you actually save when you switched providers?

Q.17 How likely are you to consider switching your service supplier within the next 12 months?

Very likely
Quite likely
Neither likely/unlikely
Not very likely
Not at all likely
Currently tied in a contract not able to switch
Don't Know

Q.18 Which of the following best describe what you are most likely to do if you switch service provider?

I would purchase the same bundle of services I receive, but from a different service provider.
I would purchase all the services within my bundle separately from different service providers
I would only purchase some of the services within my bundle
I would purchase more services within a bundle
Don't Know

LANDLINE TELEPHONE USER SECTION

Q 19 What do you and other members in your household use your home landline telephone service for?
To make calls
To receive calls
I keep it because I have to have it to allow me to access a broadband service as well but don't use it to make/receive calls.
I just have it for security
Is required for my alarm monitoring system to work
While I have the landline it is not used at all
Other – specify

Q.20a How satisfied are you overall with the service provided by (INSERT PROVIDER MENTIONED AT Q5). Please answer on a scale where 5 is very satisfied and 1 not at all satisfied.
Very Satisfied
Quite Satisfied
Neither Satisfied/Dissatisfied
Quite Dissatisfied
Very Dissatisfied
Don't Know

Q.20b Do you know how much you and your household pay for your landline telephone service on a monthly basis?

YES – RESPONDENT DEFINITELY KNOWS
YES – RESPONDENT MAYBE KNOWS
NO

Q.21 How much do you pay per month for this service. Please include overall total including line rental?

AMOUNT PER MONTH ---- ------ ----- .
Don't Know

Q.22 What percentage saving on your monthly bill do you think you could receive if you put in the time and effort to search for the best deal?

Q.23 How long do you have your home landline telephone service with (INSERT MAIN PROVIDER MENTIONED AT Q5)?

Q.24a Have you previously purchased this service from other service provider(s)?

Yes - switcher
No – non switcher
Don't Know/Can't remember

Q.24b What prompted you to select (INSERT PROVIDER MENTIONED AT Q5) within the past year?

I trust this brand
I saw an advertisement
Better price than my previous service provider
Was contacted by the service provider
Recommended by a friend/family
Any mention – special offer/promotion
No hidden charges
Other – please specify
Don't Know/Can't remember

Q.25a What percentage saving on your bill, if any, did you expect to receive when you switched service providers?

Q.26 What percentage saving on your bill, if any, did you actually save when you switched providers?

Q.27 When you switched landline telephone service provider did you keep the same telephone number

Q.28 Why did you not keep your old fixed telephone number?

I wanted a new/different fixed telephone number
I was not aware that I could keep my fixed telephone number when switching service providers
I was told by my new service provider that I could not keep my existing fixed telephone number
Other Specify

Q.29a How likely are you to consider switching Landline telephone service supplier within the next 12 Months on a scale of 1 to 5 where 1 is not at all likely and 5 is very likely?

Very likely
Quite likely
Neither likely/unlikely
Not very likely
Not at all likely
Currently in a contract not able to switch
Don't Know

Q.29b How likely are you to consider purchasing a landline telephone service, with another telecommunication service(s) as part of one overall bundle or package? Ie multiple service bought in a bundle from the same service provider

Very likely
Quite likely
Not very likely
Not at all likely
Don't Know

MOBILE USER SECTION

Q.30 What do you personally use your mobile telephone for?

1. To make/receive calls domestically
2. To make calls to and from abroad
3. To make/receive traditional text messages i.e. SMS
4. Browsing the Internet
5. Send/receive email
6. To use Social Media (e.g. Facebook, Twitter, Instagram, Pinterest)
7. Instant Messaging on Facebook
8. Instant messaging on WhatsApp
9. Instant messaging on Viber
10. Instant messaging on Snap Chat
11. Use mobile apps
12. Shop online
13. Download/Stream Video
14. Download/Stream Music
15. Use VoiP (e.g. Skype) services
16. Other – specify

Q.31 How often do you use social media/instant messaging (e.g Facebook, WhatsApp, Twitter, LinkedIn, Snap Chat etc.) on your mobile phone?

Q.32 How has your usage of instant messaging/social media impacted your usage of traditional text messages?

Q.33 Thinking about the last time you subscribed to your mobile phone service which of the following best describes what you did?

Purchase SIM only no handset
Purchase handset
Don't Know

Q.35 Thinking about your main personal mobile phone service provider (INSERT PROVIDER MENTIONED AT Q6a), do you have a fixed term contract (18 month contract) with a monthly bill, or do you have a pre pay phone where you buy vouchers/top ups?

Pre-Pay
Contract
Other – please specify

Q.36A Do you know how much you personally pay for your mobile phone service on a monthly basis?

YES – RESPONDENT DEFINITELY KNOWS
YES – RESPONDENT MAYBE KNOWS
NO

Q.36B How much do you pay per month for this services on average?

AMOUNT: --- ----- ------ .
DON'T KNOW

Q.37 What percentage saving on your monthly bill do you think you could receive if you put in the time and effort to search for the best deal?

Q.38 How satisfied are you with the overall service provided by your main mobile phone service supplier (INSERT PROVIDER MENTIONED AT Q6a). Please answer on a scale of 1 to 5 where 1 is not at all satisfied and 5 is very satisfied.

Very Satisfied
Quite Satisfied
Neither Satisfied/Dissatisfied
Quite Dissatisfied
Very Dissatisfied
Don't Know

Q.39a How long do you have your main mobile phone service with (INSERT PROVIDER MENTIONED AT Q6A).

Q.39b Have you previously purchased this service from other provider(s)?

Yes - switcher
No – non switcher
Don't Know/Can't remember

Q.40 What prompted you to select (INSERT PROVIDER MENTIONED AT Q6a) within the past year?

I trust this brand
I saw an advertisement
It was part of a bundled offer
Better price than my previous service provider
Good customer service
Was contacted by the service provider
Recommended by a friend/family
Any mention – special offer/promotion
No hidden charge
Competitive Price
Network coverage/Reliability
Offered free/subsidised phone
Loyalty/Rewards
Good range of SMART phones
My friends/family were on this network
Any mention – special offer/promotion
Other – please specify

Don't Know/Can't remember

Q.41 What percentage saving on your bill, if any, did you expect to receive when you switched service providers?

Q.42 What percentage saving on your bill, if any, did you actually save when you switched service providers?

Q.43 If you switched mobile telephone service provider did you keep the same mobile telephone number?

Yes
No
I did not have mobile phone service before
Don't Know

Q.44 Why did you decide not to transfer your mobile telephone number?

I wanted a new/different mobile telephone number
I was not aware that I could keep my mobile telephone number when switching service providers
I was told by my new service provider that I could not keep my existing mobile telephone number
Other Specify

Q.45 How likely are you to consider switching mobile phone service provider within the next 12 months? Please answer on a scale of 1 to 5 where 1 is not at all likely and 5 is very likely

Very likely
Quite likely
Neither likely/unlikely
Not very likely
Not at all likely
Tied in a contract not able to switch
Don't Know

Q.46 How likely are you to consider purchasing a mobile phone service, with another telecommunications service provider as part of one overall bundle or package? IE Multiple service bought in a bundle from the same service provider for an overall price. Please answer on a scale of 1 to 5 where 1 is not at all likely and 5 is very likely

Very likely
Quite likely
Neither Likely/Unlikely
Not very likely
Not at all likely
Don't Know

Q.47 Have you ever received a text message from your mobile provider which says that you are close to your data allowance?

Yes
No
Don't Know

Q.48 When you received this message which of the following best describes what you usually do?

Normally chose to continue and exceed cap
Normally didn't chose to continue or exceed cap
Have chosen both.
Can't remember

FIXED BROADBAND SECTION

Q.49 Which of the following devices are connected to your broadband service and used within your home?

Desktop computer
Laptop computer
Smart Phone which is able to access the internet/data on your phone (iPhone, Android, Blackberry)
Tablet computer (iPad)
Gaming console (PlayStation, Xbox or Nintendo Wii)
Mobile gaming device (PSP, Nintendo DS)
eReader (Kindle, Kobo)
Smart TV (TV that connects to the internet)
MP3/Digital music player
Mobile internet device – iPod Touch/Netbook
None of the above

Q.50a Do you know how much you and your household pay for your broadband service on a monthly basis?

YES – RESPONDENT DEFINITELY KNOWS
YES – RESPONDENT MAYBE KNOWS
NO

Q.50b How much do you pay per month for this services?

AMOUNT: ---- ---- ---- .
Don't Know

Q.51 What percentage saving on your monthly bill do you think you could receive if you put in the time and effort to search for the best deal?

Q.52 What do you and other members in your household use your home fixed broadband service for

Browsing the internet
Connecting my mobile phone to my home broadband service via Wi-Fi
Using email
Using real time video/voice messaging (eg SKYPE, Viber, FaceTime)
Purchasing goods/services
Manage Banking/Pay Bills/Other Services
Gaming
Social Media, Instant Messaging (e.g Facebook, WhatsApp, Twitter, LinkedIn, Snap Chat etc.)
Downloading/streaming movies, music/TV programmes
Accessing paid for TV streaming services, such as NETFLIX
Catch Up TV Services (Sky On Demand, RTÉ player)
Working at home/Teleworking
Other specify

Q.53 How often do you use voice over broadband service, such as SKYPE/FaceTime/Viber to make a phone call?

Q.54 What type of calls do you predominantly make using voice over broadband service such as SKYPE/FaceTime/Viber

Calls to fixed line phones
Calls to mobile phones
Calls to international numbers
Calls to premium rate numbers such as competition lines, quiz shows, horoscope, etc.
Calls to directory enquires
Calls to 1800 numbers
None of the above
Don't Know

Q.55 Has the usage of voice over broadband service, such as SKYPE/FaceTime/Viber to make a phone call impacted your usage of traditional voice calls?

Q.56a How satisfied are you with your <u>fixed broadband</u> supplier (INSERT PROVIDER MENTIONED AT Q8). Please answer on a scale of 1 to 5 where 1 is not at all satisfied and 5 is very satisfied.

Very Satisfied
Quite Satisfied
Neither Satisfied/Dissatisfied
Quite Dissatisfied
Very Dissatisfied
Don't Know

Q.56b How satisfied are you with the following aspects of service you receive from this supplier (INSERT PROVIDER MENTIONED AT Q8). Please answer on a scale of 1 to 5 where 1 is not at all satisfied and 5 is very satisfied.

Cost
Length of contract you signed up to
Coverage/Reliability
Actual speed experienced
Billing Accuracy
Offers and Promotions

Very Satisfied
Quite Satisfied
Neither Satisfied/Dissatisfied
Quite Dissatisfied
Very Dissatisfied
Don't Know

Q.57a How long do you have your fixed broadband service with (INSERT PROVIDER MENTIONED AT Q8).

Q.57b Have you previously purchased this service from other provider(s)?

Yes - switcher
No – non switcher
Don't Know/Can't remember

Q.58 Why did you select (INSERT PROVIDER MENTIONED AT Q8) within the past year?

I trust this brand
I saw an advertisement
It was part of a bundled offer
Better price than my previous service provider
Good customer service
Only provider available in my area
Promised speed of internet
Was contacted by the service provider
Recommended by a friend/family
Any mention – special offer/promotion
No hidden charges
Other – please specify
Don't Know/Can't remember

Q.59 What percentage saving on your bill, if any, did you expect to receive when you switched providers?

Q.60 What percentage saving on your bill, if any, did you actually save when you switched providers?

Q.61 How likely are you to consider switching your fixed home broadband supplier within the next 12 months?

Q.62 How likely are you to consider purchasing a fixed broadband service, with another telecommunications service(s) as part of one overall bundle or package? Ie Multiple service bought in a bundle from the same service provider for an overall price

Very likely
Quite likely
Neither likely/unlikley
Not very likely
Not at all likely
Don't Know

Q.63 Do you know the maximum claimed 'up to' download speed for your fixed broadband service?

YES – RESPONDENT DEFINITELY KNOWS
YES – RESPONDENT MAYBE KNOWS
NO

Q.64 What is the maximum claimed 'up to' download speed for your fixed broadband service?

DO NOT PROMPT. RECORD ACTUAL MEGA BITS PER SECOND (MBPS)

---- ----- ----- -----MBPS

MOBILE BROADBAND SECTION

Q.65a How satisfied are you with the service you receive from your mobile broadband supplier (INSERT PROVIDER MENTIONED AT Q7). Please answer on a scale from 1 to 5 where 1 is not at all satisfied and 5 is very satisfied.

Very Satisfied
Quite Satisfied
Neither Satisfied/Dissatisfied
Quite Dissatisfied
Very Dissatisfied
Don't Know

Q.65b How satisfied are you with the following aspects of service you receive from this supplier (INSERT PROVIDER MENTIONED AT Q7). Please answer on a scale from 1 to 5 where 1 is not at all satisfied and 5 is very satisfied.

Cost
Length of contract you signed up to
Network Coverage/Reliability
Actual download speed experienced
Actual upload speed experienced
Billing Accuracy
Offers and Promotions

Very Satisfied
Quite Satisfied
Neither Satisfied/Dissatisfied
Quite Dissatisfied
Very Dissatisfied
Don't Know

Q.66 Which of the following devices are connected to your mobile broadband service

Desktop computer
Laptop computer
Smart Phone which is able to access the internet/data on your phone (iPhone, Android, Blackberry)
Tablet computer (iPad)
Gaming console (PlayStation, Xbox or Nintendo Wii)
Mobile gaming device (PSP, Nintendo DS)
eReader (Kindle, Kobo)
Smart TV (TV that connects to the internet)
MP3/Digital music player
Mobile internet device – iPod Touch/Netbook
None of the above

Q.67 What do you use your mobile broadband service for?

Browsing the internet
Connecting my mobile phone to my home broadband service via Wi-Fi
Using email
Using real time video/voice messaging (eg SKYPE, Viber, FaceTime)
Purchasing goods/services

Manage Banking/Pay Bills/Other Services
Gaming
Social Media, Instant Messaging (e.g Facebook, WhatsApp, Twitter, LinkedIn, Snap Chat etc.)
Downloading/streaming movies, music/TV programmes
Accessing paid for TV streaming services, such as NETFLIX
Catch Up TV Services (Sky On Demand, RTÉ player)
Working at home/Teleworking
Other specify

Q.68 How often do you use voice over broadband service, such as SKYPE/FaceTime/Viber to make a phone call?

Q.69 What type of calls do you predominantly make using voice over broadband service such as SKYPE/FaceTime/Viber

Calls to fixed line phones
Calls to mobile phones
Calls to international numbers
Calls to premium rate numbers such as competition lines, quiz shows, horoscope, etc.
Calls to directory enquires
Calls to 1800 numbers
Don't know

Q.70 Has the usage of voice over broadband service, such as SKYPE/FaceTime/Viber to make a phone call impacted your usage of traditional voice calls?

Q.71a Do you know how much you and your household pay for your mobile broadband service on a monthly basis?

YES – RESPONDENT DEFINITELY KNOWS
YES – RESPONDENT MAYBE KNOWS
NO

Q.71B How much do you pay per month for your mobile broadband service?

Amount: ---- ---- ---- .
Don't Know

Q.72 What percentage saving on your monthly bill do you think you could receive if you put in the time and effort to search for the best deal?

Q.73 How long do you have your mobile broadband service with (INSERT PROVIDER MENTIONED AT Q7).

Q.74 Have you previously purchased this service from other provider(s)?

Yes - switcher
No – non switcher
Don't Know/Can't remember

Q.75 What prompted you to select (INSERT PROVIDER MENTIONED AT Q7) within the past year?

I trust this brand
I saw an advertisement
It was part of a bundled offer
Better price than my previous service provider
Good customer service
Only provider available in my area
Promised speed of internet
Was contacted by the service provider
Recommended by a friend/family
Any mention – special offer/promotion
No hidden charges
Needed on the go access
Other – please specify
Don't Know/Can't remember

Q.76 What percentage saving on your bill, if any, did you expect to receive when you switched providers?

Q.77 What percentage saving on your bill, if any, did you actually save when you switched providers?

Q.78 How likely are you to consider switching mobile broadband service supplier within the next 12 months?

Very likely
Quite likely
Neither likely/unlikely
Not very likely
Not at all likely
Tied in a contract not able to switch
Don't Know

Q.79 Do you know the maximum claimed 'up to' download speed for your main broadband service?

YES – RESPONDENT DEFINITELY KNOWS
YES – RESPONDENT MAYBE KNOWS
NO

Q.80 What is the maximum claimed 'up to' download speed for your main broadband service?

RECORD SPEED ---- ----- ----- MBPS

Bill Shock

Q.83 Thinking about your (EACH SERVICE HELD Q1A) have you ever received a bill or paid more for a service than you expected?

Yes
No
Don't Know

Q.84 Which service did this relate to?

Landline service
Mobile Phone
Mobile Broadband
Broadband at home
TV

Q.85 What did the extra charge relate to regarding the service(s) you mentioned?

Exceed number of minutes on voice calls
Exceed number of texts than allowed for on my price plan
Roaming – using my phone while abroad (voice)
Roaming – using my phone while abroad (text)
Roaming – using my phone while abroad (internet)
Exceed data allowance on mobile broadband subscription
Exceed data allowance on fixed mobile package
Signing up to alerts – weather, sports
Other - specify
Don't Know

CLASSIFICATION SECTION

C.6 How many dependent children of the following age groups are there living in your household if any?

0-2 years
3-5 years
6-15 years
Over 16 years
None

C.7 Can you tell me your current work status?

Working full time (30 hours or more)
Working part time
Unemployed
Housewife
Full time student
Retired

C.8 And what is your current marital status?

Married/Civil Partnership
Living as married/co-habiting
Single
Widowed/divorced/separated

C.9 Which of these best describes your current living arrangements?

Living in private rented accommodation
Living in council provided accommodation
Living in own home with a mortgage
Living in own home with no mortgage
Living in parents/family home

Other

C.10 Which of the following categories best describes the total annual household income earned by all wage earners in your household? Is it...

Less than €15,000
€15,000 to less than €25,000
€25,000 to less than €35,000
€35,000 to less than €50,000
€50,000 to less than €75,000
€75,000 or more
No answer/refused

C.12 Finally, can I ask you are you currently in receipt of any (household benefits package, disability allowance, welfare payment, carer's allowance)?

Yes
No
Don't Know

END