



ComReg Consumer FVCT Market Research



REDC

Objectives & Methodology



- / ComReg is required to review certain electronic communications markets that are susceptible to ex-ante regulation, as set out by the European Commission ('EC'). The Fixed Voice Call Termination ('FVCT') Market is one of five wholesale markets that the EC has identified as being susceptible to ex-ante regulation.

- / In order to assist with its market review of FVCT, ComReg has engaged REDC to carry out market research in order to gain insights into residential consumer characteristics, including:
 - Incidence of ownership and usage of fixed voice telephony amongst consumers
 - Consumer Usage of mobile phone for traditional calls, texts (SMS) and emails
 - Consumer Usage of Applications ('Apps') for voice/messaging
 - Consumer Usage of Voice-over-IP ('VOIP')
 - Incidence of bundling telecommunications services amongst Consumers
 - Price awareness of voice calls and switching behaviour of Consumers

- / 1,018 face-to-face interviews were conducted by RED C amongst a nationally representative sample of telecommunication decision makers aged 18+ in July 2016.

- / Interviews were quota controlled by age, gender, social class and region to represent the known profile of the target market for the survey. CSO data 2011 was used to develop the sampling for this research project.

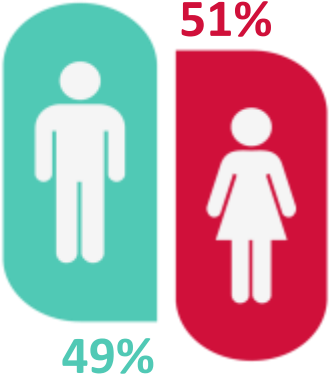
Statistical Testing has been conducted in the survey. Where a significant difference exists at the 95% confidence interval the following symbol is used:



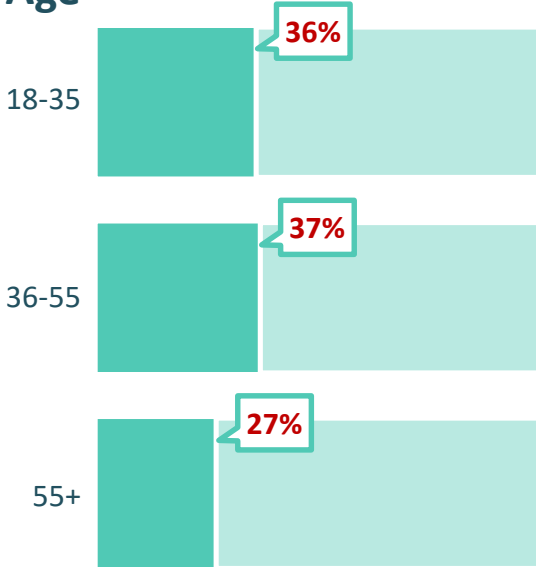
Sample Profile

(Base: All Telecommunication Decision Makers - 1,018)

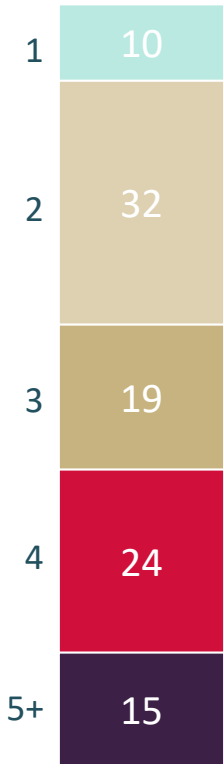
Gender



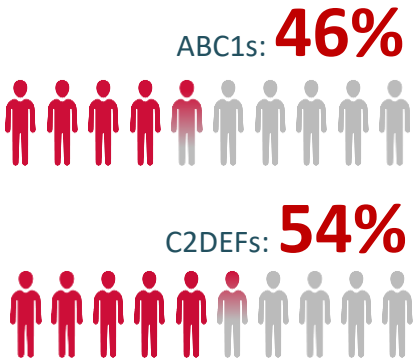
Age



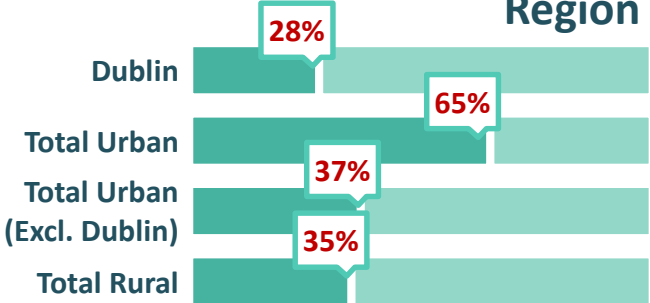
No. Living in Household %



Social Class



Region



Key Findings from this Survey

- / 62% of the nationally representative sample of telecommunication decision makers aged 18+ in this survey have a fixed line phone in the household used for making and receiving calls. Ownership of fixed line is significantly different by age with ownership rates at 46% among 18-35 to 83% for 55+. 29% use fixed line more than once a day. 14% state they are likely to cancel fixed line and use mobile phone instead at some point in the future. 52% of respondents in the survey that own a fixed line say that it is likely that they have kept their landline service for receiving calls (Ref: Slide 15/41/44/80).
- / According to this survey, 61% of the population use OTT apps for voice/video calls with usage significantly higher in Dublin (72%) and among 18-35 year olds(82%). 58% of respondents using OTT apps for instant messaging again higher among 18-35 year olds (82%) (Ref: Slide 32/34).
- / 58% of Survey respondents have bundled telecommunication services at home with incidence highest in Dublin (82%). The most popular bundle type in this survey is Landline and Broadband Bundle (40%) (Ref: Slide 53/54).
- / 16% of fixed line users in this survey quite or very frequently consider cost of call when calling from a fixed line number. 57% of landline owners surveyed get free or discounted calls as part of their fixed line service (Ref: Slide 58/62).
- / Average length of time with fixed line service provider amongst landline owners in the survey is 5 years and 4 months. 61% have never switched service provider in the past. (Ref: Slide 73/74)
- / 29% of those currently without a fixed line phone that took part in the survey had previously had a fixed line connection - the most common reason given for cancelling is the perception that they don't need a landline/ use mobile phone instead (55%). 5% of respondents without fixed line phone connection say they will get a fixed line in the future. (Ref: Slide 82/84/86)



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Infographics of Key Findings

Fixed Line Residential Consumer Market Research



62%

of households surveyed have a fixed phone line at home – 99% use this line to make/receive phone calls (Ref: slide 15/16)

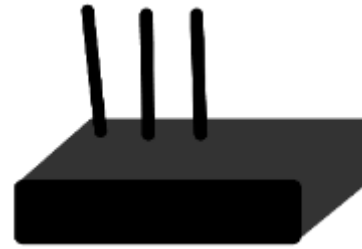


42%

Percentage of survey respondents using eir for fixed voice for personal calls (Ref: Slide 17)



Fibre Broadband



38%

Percentage of decision makers in this survey who connect to the internet at home using Fibre broadband (Ref: Slide 19)

32%

Of survey respondents have eir as supplier of broadband at home* (Ref: Slide 20)

* Does not include mobile broadband or internet access over mobile phone

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Fixed Line Residential Consumer Market Research: Use of OTT Apps for Voice/Video Calls and Instant Messaging



58%

of survey respondents use OTT apps for instant messaging (Ref: Slide 34)



61%

of survey respondents use OTT apps for voice/video calls (Ref: Slide 32)



41%

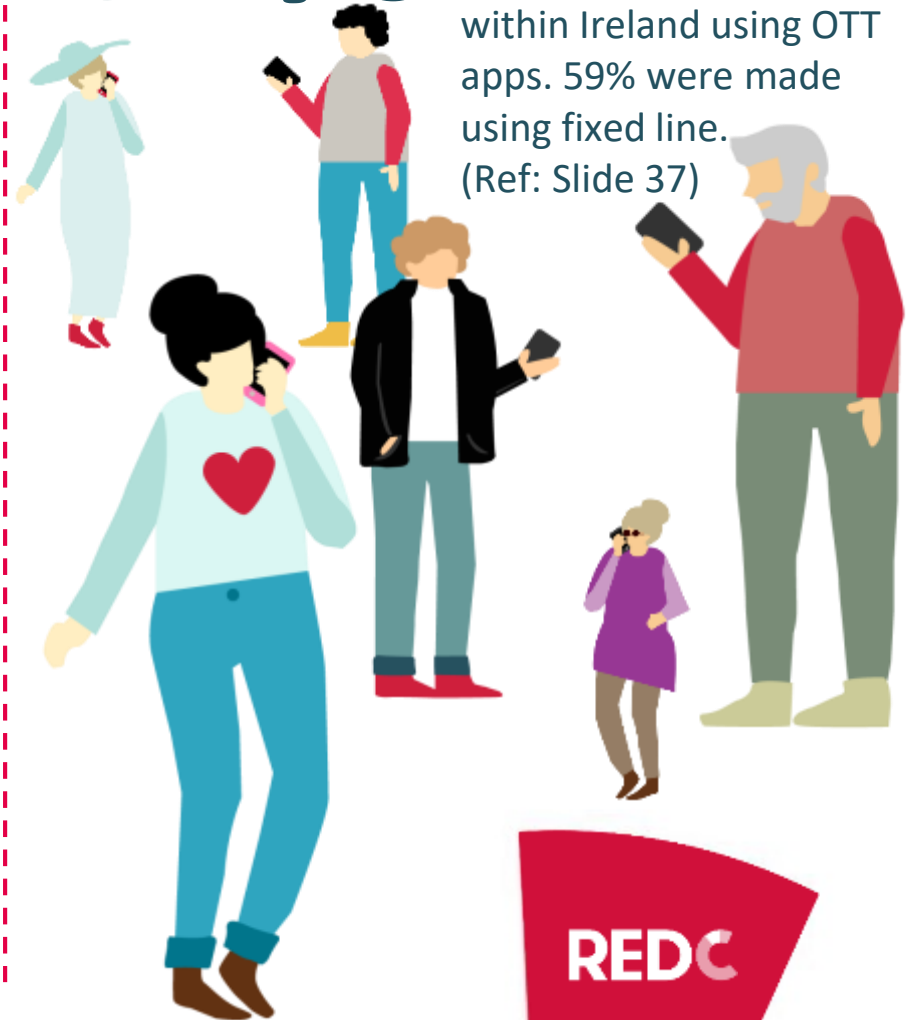
Whatsapp most popular (Ref: Slide 32)

39%

Whatsapp most popular (Ref: Slide 34)

41%

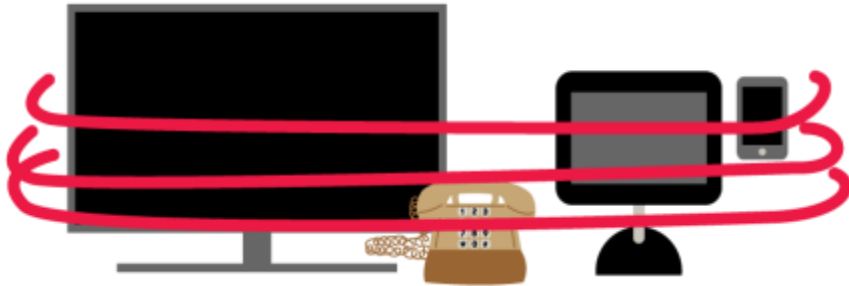
Proportion of calls OTT app users in this survey made when making calls within Ireland using OTT apps. 59% were made using fixed line. (Ref: Slide 37)



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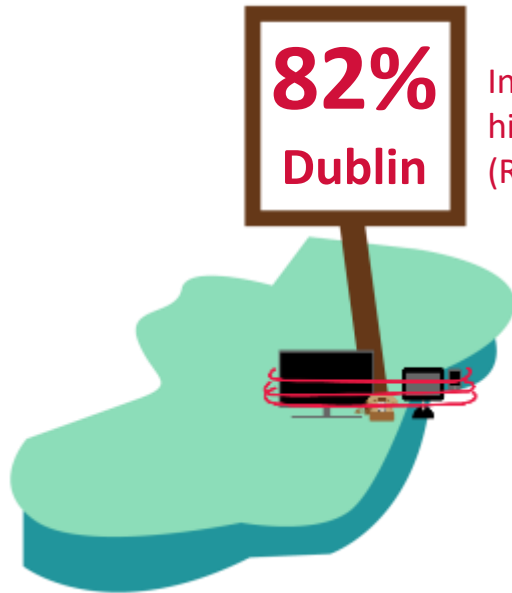
Fixed Line Residential Consumer Market Research: Bundle

58% of survey respondents Bundle
Telecommunication
Services at home
(Ref: Slide 53)



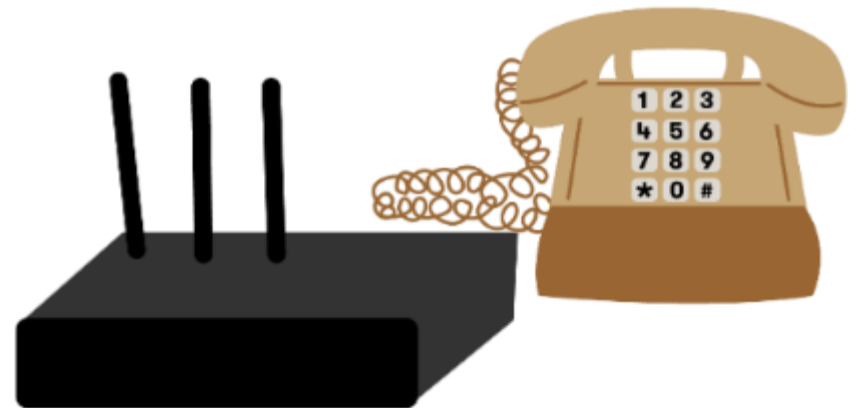
82%
Dublin

Incidence of bundling
higher in Dublin
(Ref: Slide 53)



40%

of Bundle owners in
this survey have a
Broadband and
Landline Bundle
(Ref: Slide 54)



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Fixed Line Residential Consumer Market Research: Calling Pattern (Fixed Line)



29%

of those surveyed use fixed line more than once a day
(Ref: Slide 41)



38%

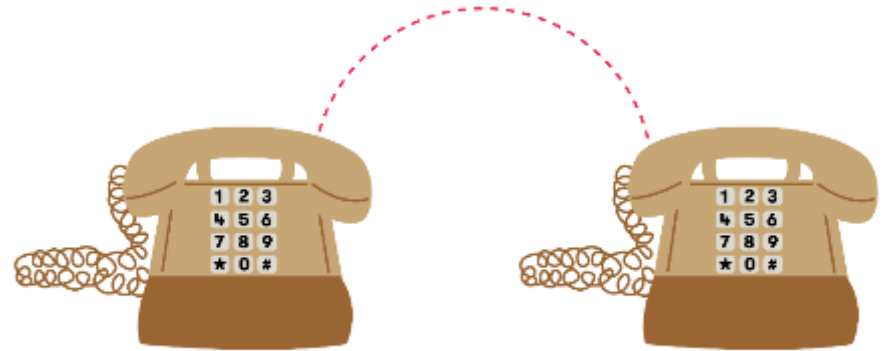
among 55 years +
(Ref: Slide 41)



36%
of 18-35s in survey use
landline less frequently than
weekly (Ref: Slide 41)



55% Estimate % of all calls made from
fixed line in household are to
local/national fixed line numbers
according to this survey
(Ref: Slide 47)



65% of respondents with fixed and mobile phones say
they are not very or not at all likely to cancel
their landline and opt for mobile only
(Ref: Slide 44)



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Fixed Line Residential Consumer Market Research: Cost Awareness



16%

of survey respondents very or quite frequently consider cost of call when calling from landline to another number (Ref: Slide 58)

57%

of fixed line home phone suppliers include Free or reduced calls as part of service according to this survey (Ref: Slide 62)



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Fixed Line Residential Consumer Market Research: Switching

61%

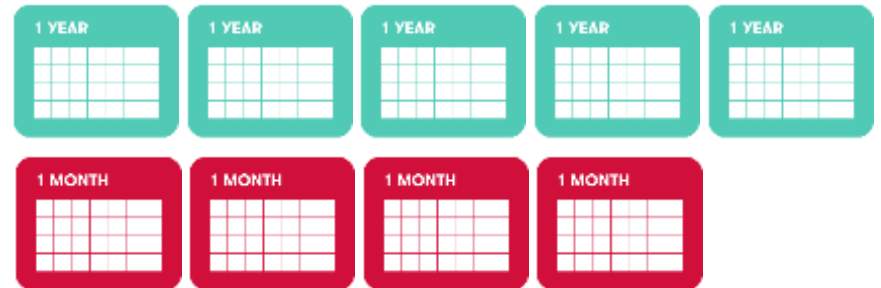
of those surveyed have never switched fixed line service
(Ref: Slide 74)



Average length of time with fixed line supplier

(Ref: Slide 73)

5 Years 4 Months



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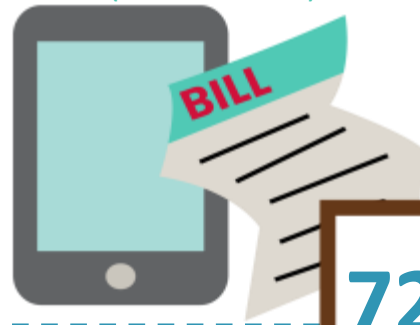
Fixed Line Residential Consumer Market Research: Mobile Phone

96%

of telecommunication decision makers have a mobile phone according to this survey (Ref: Slide 24)

47%

Of mobile phone users surveyed have a bill pay subscription (Ref: Slide 27)



72%

84%

Of mobile users in this survey use mobile phone more than once a day (Ref: Slide 28)



of calls made from mobiles are to other mobile phones within Ireland according to this survey (Ref: Slide 29)



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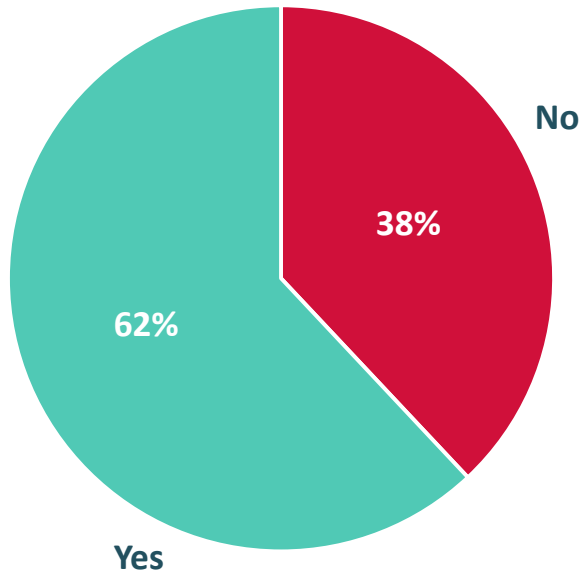


Access Modes of Telecommunications

Incidences of Having Fixed Line Phone Connection in Household

(Base: All Telecommunication Decision Makers - 1,018)

Q. Do you have a fixed line phone connection in your home?



| | Region | | | | Age | | | Social Class | |
|-----|--------------|-------------------|----------------------------------|-------------------|-------------|-------------|-----------|--------------|-------------|
| | Dublin (285) | Total Urban (662) | Total Urban (Excl. Dublin) (377) | Total Rural (356) | 18-35 (366) | 36-55 (377) | 55+ (275) | ABC1 (468) | C2DEF (550) |
| Yes | 71% | 62% | 56% | 61% | 46% | 62% | 83% | 71% | 54% |
| No | 29% | 38% | 44% | 39% | 54% | 38% | 17% | 29% | 46% |

NOTE: In the Consumer MVCT survey, 54% had a fixed line connection, however, that was based on a sample of mobile phone users aged 15+, while this is based on telecommunications decision makers aged 18+

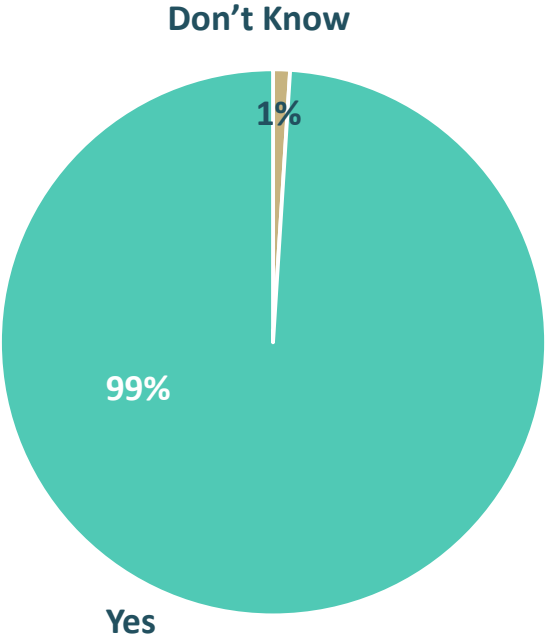
62% of the survey sample have a fixed line phone, with highest incidences in Dublin and amongst older adults (aged 55+).



Confirmation of Having A Fixed Line Phone Connection for Making/Receiving Calls

(Base: All who have fixed line phone connection - 629)

Q. Do you have a telephone in your household that is connected (either via a corded or cordless handset) to your fixed line connection and is used in your household to make or receive personal calls?



| | Region | | | | Age | | |
|------------|--------------|-------------------|----------------------------------|-------------------|-------------|-------------|-----------|
| | Dublin (203) | Total Urban (414) | Total Urban (Excl. Dublin) (210) | Total Rural (216) | 18-35 (169) | 36-55 (232) | 55+ (228) |
| Yes | 99% | 99% | 99% | 99% | 98% | 100% | 100% |
| Don't Know | 1% | 1% | 1% | 1% | 2% | 0 | 0 |

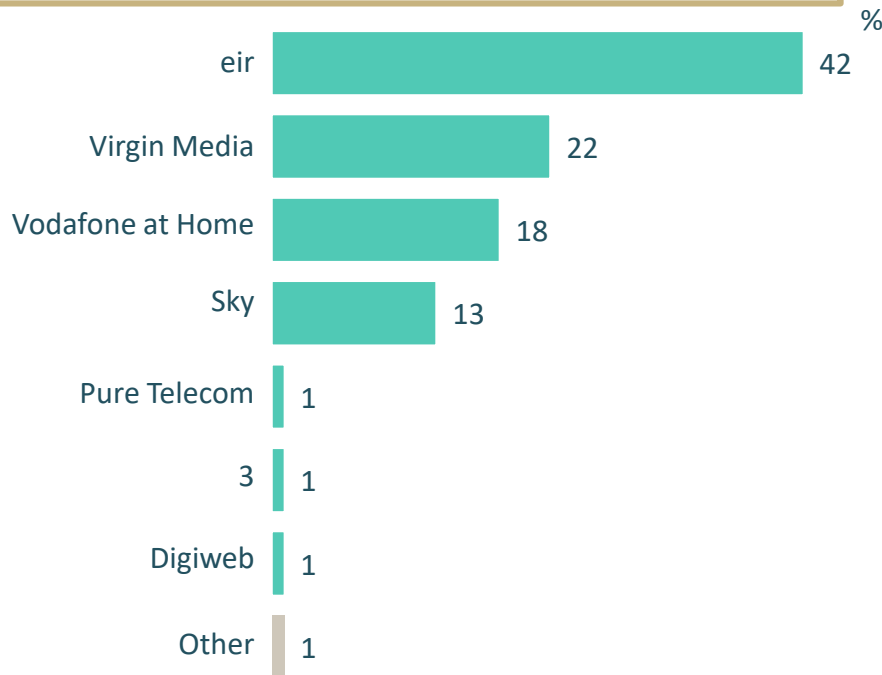
99% of survey respondents with a fixed line phone connection confirmed ownership of a fixed line phone connection specifically for making and receiving a call.



Which Company Provides Fixed Line Phone Service Used for Personal Calls

(Base: All confirming they have active fixed line - 625)

Which company provides the fixed line phone service you mainly use for personal calls?



| Region | | | |
|--------------|-------------------|----------------------------------|-------------------|
| Dublin (201) | Total Urban (410) | Total Urban (Excl. Dublin) (209) | Total Rural (214) |
| 26% | 38% | 50% | 49% |
| 55% | 33% | 11% | 1% |
| 5% | 13% | 22% | 27% |
| 12% | 12% | 13% | 15% |
| 0 | * | 1% | 3% |
| * | 1% | 1% | 2% |
| 1% | 1% | 1% | 1% |
| * | * | * | 2% |

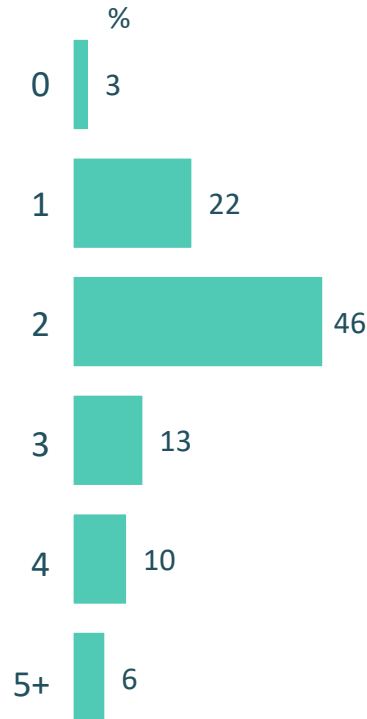
42% of survey respondents have a fixed line phone service with eir, while 22% have this service with Virgin Media



Number of People in Household Regularly Using Fixed Line

(Base: All confirming they have active fixed line - 625)

Q. How many people in your home including yourself regularly use your fixed line phone to make or receive voice calls ?



Mean Score **2.25**

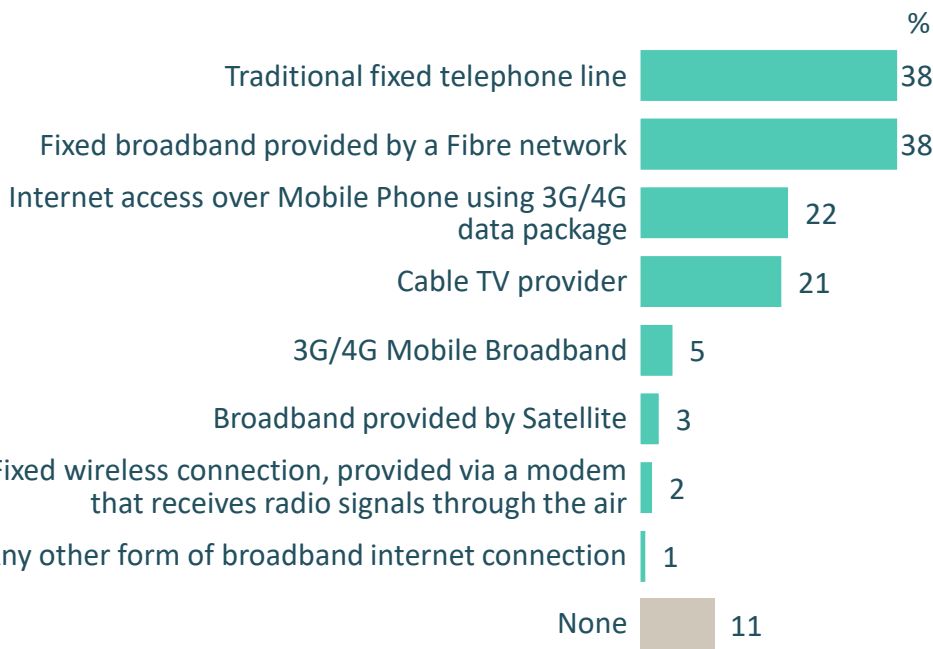
On average 2.2 people per household with a fixed voice line for making/receiving calls use the line regularly according to this survey.



Which of Following Ways to Connect to the Internet Are Used By Your Household?

(Base: All Telecommunication Decision Makers - 1,018)

Q. Thinking about different ways you can access the internet in your home which of the following means of accessing the internet, if any, are used within your household?



| Region | | | | Age | | | Social Class | |
|--------------|-------------------|----------------------------------|-------------------|-------------|-------------|-----------|--------------|-------------|
| Dublin (285) | Total Urban (662) | Total Urban (Excl. Dublin) (377) | Total Rural (356) | 18-35 (366) | 36-55 (377) | 55+ (275) | ABC1 (468) | C2DEF (550) |
| 22% | 35% | 44% | 44% | 34% | 40% | 42% | 41% | 35% |
| 74% | 46% | 25% | 22% | 41% | 38% | 34% | 46% | 31% |
| 15% | 20% | 24% | 25% | 29% | 22% | 11% | 21% | 22% |
| 49% | 30% | 15% | 5% | 26% | 18% | 18% | 22% | 20% |
| 1% | 3% | 5% | 9% | 8% | 4% | 3% | 5% | 5% |
| 1% | 3% | 4% | 3% | 3% | 4% | 1% | 2% | 3% |
| 1% | 1% | 1% | 4% | 3% | 1% | 2% | 2% | 2% |
| * | 1% | 2% | 1% | 1% | 2% | * | 1% | 1% |
| 3% | 10% | 15% | 15% | 5% | 8% | 25% | 5% | 17% |

NOTE: Each respondent can choose multiple answers so totals will not add to 100%

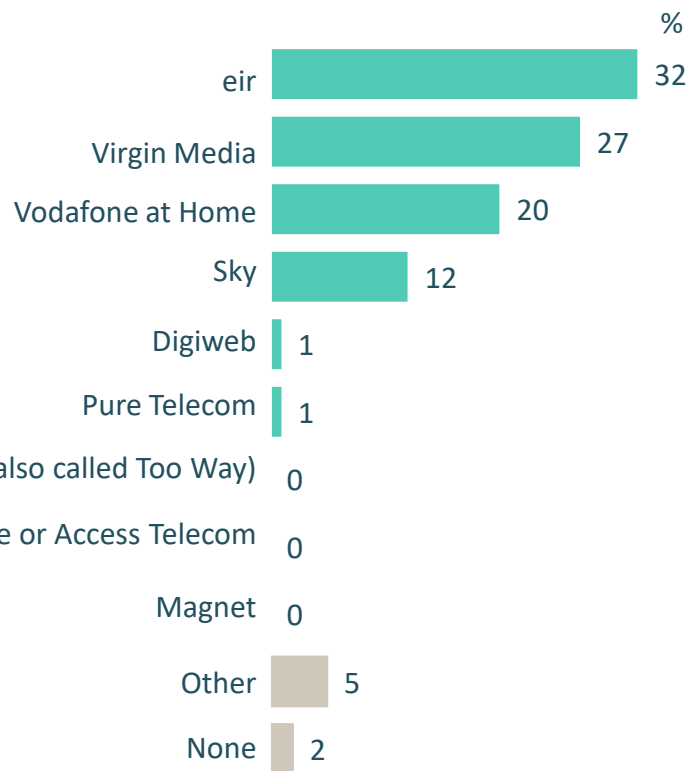
According to this survey, 38% of households access the internet by traditional fixed telephone line while 38% access fixed broadband by a fibre network.



Which Company Provides Main Broadband Service in Household

(Base: All adults who said they connect using fixed broadband (any access) - 791)

Q. Which company provides your main broadband service in your household?



| Region | | | |
|--------------|-------------------|----------------------------------|-------------------|
| Dublin (271) | Total Urban (546) | Total Urban (Excl. Dublin) (275) | Total Rural (244) |
| 24% | 31% | 38% | 34% |
| 63% | 39% | 15% | 1% |
| 4% | 14% | 23% | 34% |
| 6% | 10% | 14% | 15% |
| 1% | 1% | 1% | 1% |
| 0 | * | * | 1% |
| 0 | * | 1% | 0 |
| * | * | * | 0 |
| * | * | 0 | 0 |
| 1% | 2% | 3% | 11% |
| 0 | 2% | 3% | 3% |

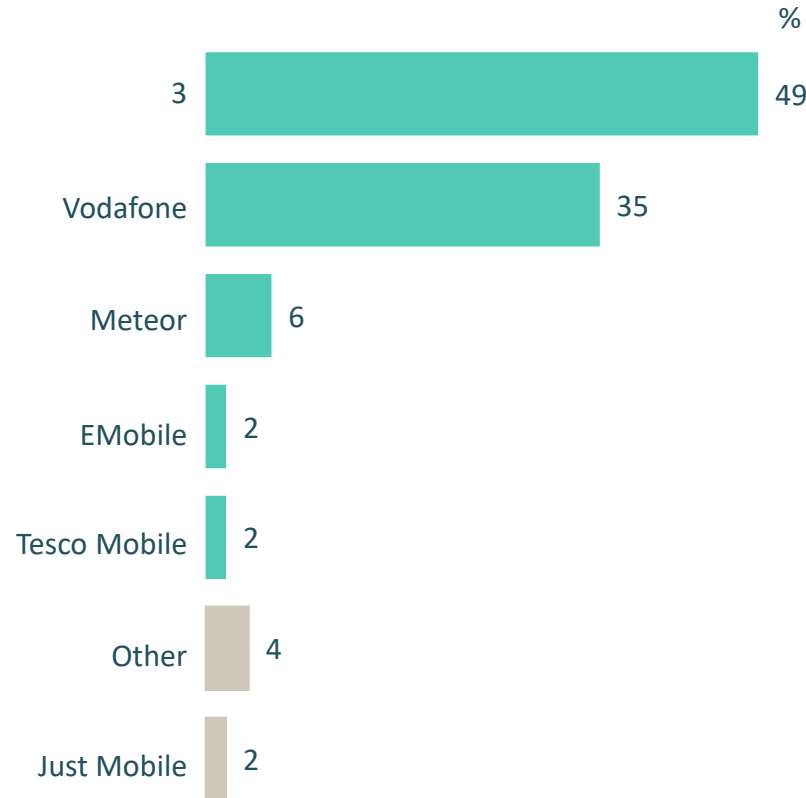
32% of those in the survey with a broadband connection (non mobile phone/mobile broadband) have eir as their broadband supplier, while 27% have Virgin Media as their broadband supplier.



Mobile Broadband Provider

(Base: All adults who said they connect using mobile broadband – 53)

Q. Which company(s) provides your mobile broadband service, e.g. using a USB or dongle or data card which you plug into your computer?



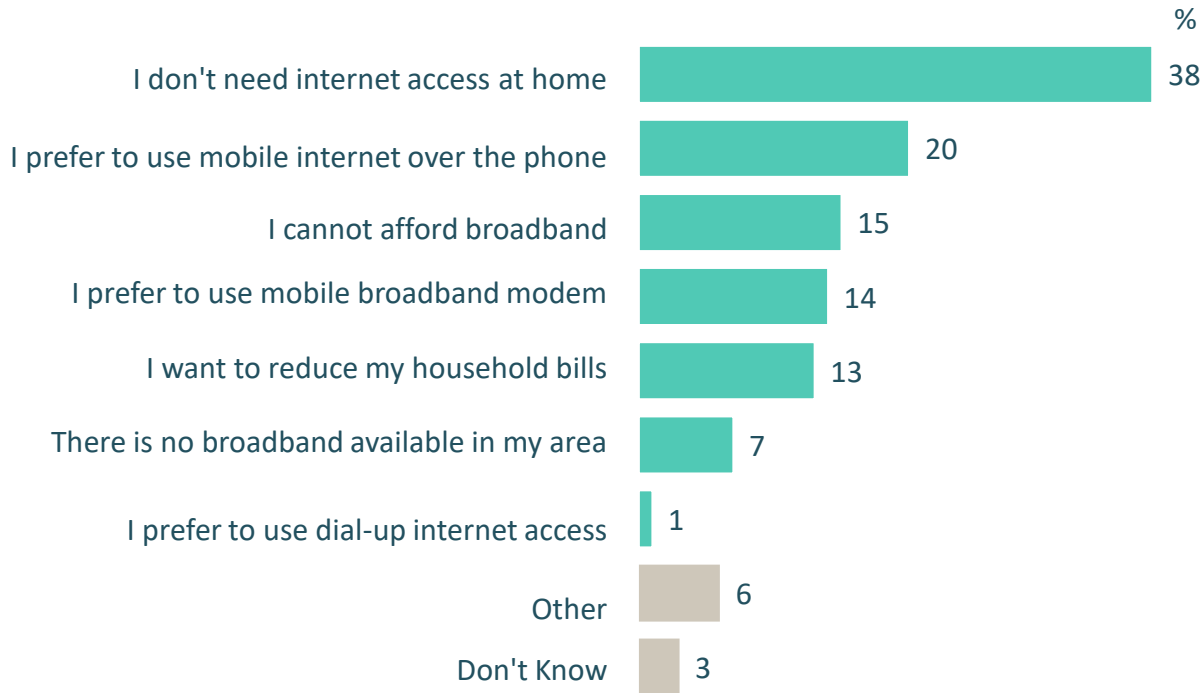
Amongst those in the survey that use mobile broadband, 49% have their mobile broadband service with 3.



Reasons For Not Having Fixed Broadband

(Base: All not using fixed phone/cable/fibre as broadband connection - 265)

Q. Why don't you have a fixed broadband connection in your home?



| Region | | | | Social Class | |
|--------------|-------------------|----------------------------------|-------------------|--------------|-------------|
| Dublin (18*) | Total Urban (134) | Total Urban (Excl. Dublin) (116) | Total Rural (131) | ABC1 (80) | C2DEF (185) |
| 43% | 35% | 34% | 40% | 33% | 40% |
| 0 | 17% | 19% | 24% | 18% | 21% |
| 5% | 21% | 24% | 8% | 9% | 18% |
| 26% | 11% | 9% | 17% | 20% | 11% |
| 17% | 16% | 16% | 10% | 12% | 14% |
| 0 | 5% | 5% | 10% | 8% | 7% |
| 0 | 1% | 1% | 1% | 1% | 1% |
| 24% | 7% | 5% | 4% | 11% | 3% |
| 7% | 5% | 5% | 1% | 4% | 2% |

According to this survey, 38% of those not connecting to broadband via fixed phone, cable or Fibre say they don't do so as they do not need internet access at home.



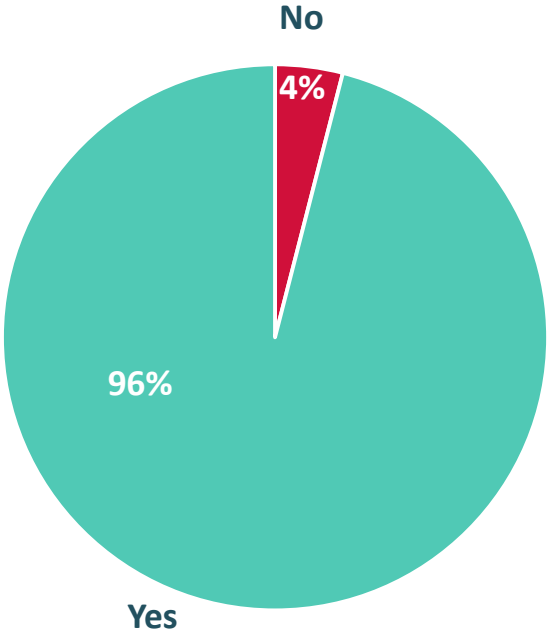


Mobile Phone

Incidence of Having Mobile Phone

(Base: All Telecommunication Decision Makers - 1,018)

Q. Do you personally own and use a mobile phone?



| | Region | | | | Age | | |
|-----|--------------|-------------------|----------------------------------|-------------------|-------------|-------------|-----------|
| | Dublin (285) | Total Urban (662) | Total Urban (Excl. Dublin) (377) | Total Rural (356) | 18-35 (366) | 36-55 (377) | 55+ (275) |
| Yes | 96% | 95% | 94% | 97% | 98% | 98% | 89% |
| No | 4% | 5% | 6% | 3% | 2% | 2% | 11% |

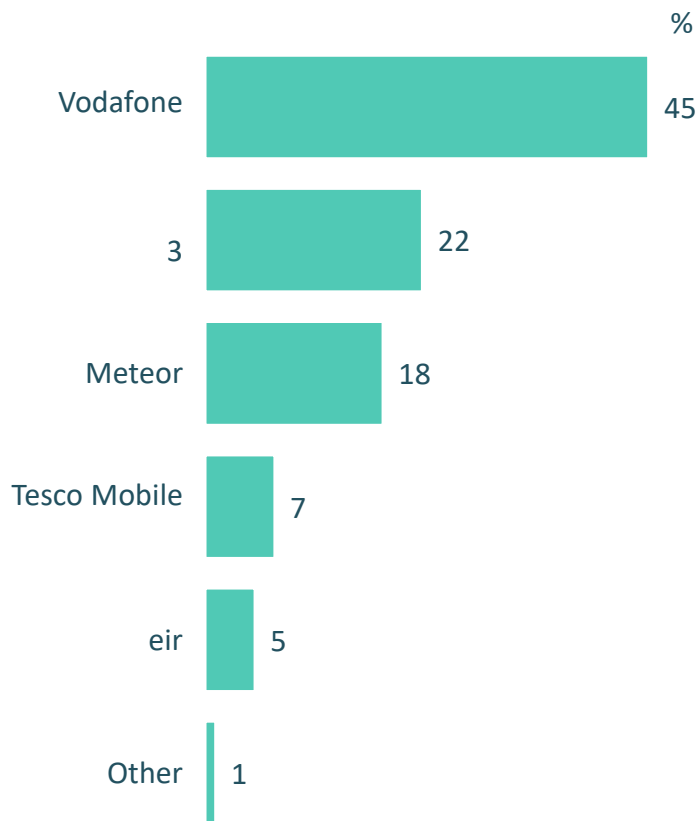
96% of those in this survey own and use a mobile phone, with ownership lower amongst those aged 55+ (89%)



Main Mobile Phone Provider – Single Response Only

(Base: All adults who use a mobile phone – 975)

Q. Which company provides your main mobile phone service?



| Region | | | | Age | | |
|--------------|-------------------|----------------------------------|-------------------|-------------|-------------|-----------|
| Dublin (273) | Total Urban (629) | Total Urban (Excl. Dublin) (356) | Total Rural (346) | 18-35 (361) | 36-55 (370) | 55+ (244) |
| 35% | 40% | 43% | 56% | 34% | 50% | 56% |
| 22% | 20% | 18% | 26% | 24% | 24% | 15% |
| 24% | 24% | 24% | 8% | 24% | 15% | 14% |
| 12% | 10% | 8% | 2% | 11% | 4% | 5% |
| 4% | 4% | 4% | 7% | 4% | 5% | 8% |
| 2% | 3% | 2% | * | 2% | 1% | 1% |

NOTE: The above relates to main mobile phone provider only

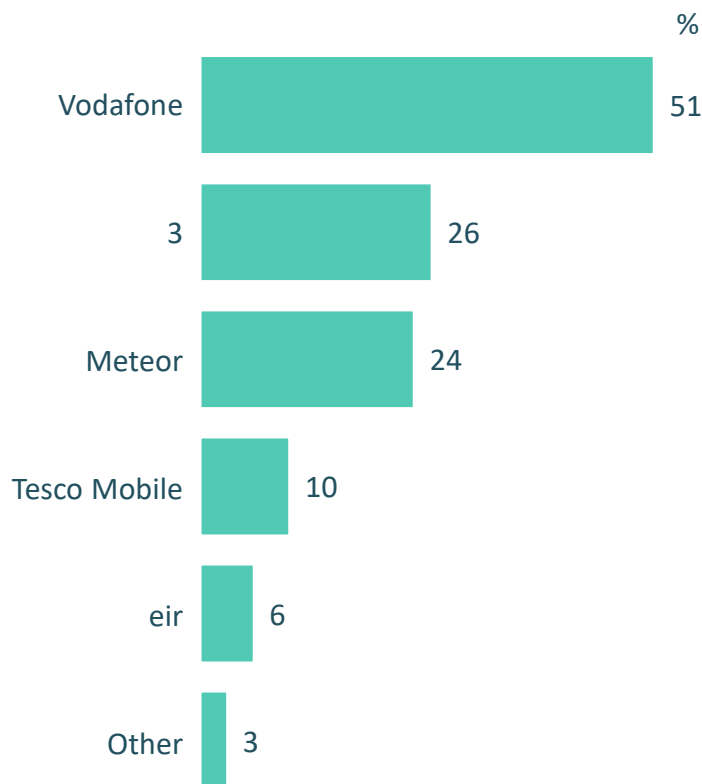
According to this survey, 45% of those with a mobile phone have their mobile phone service with Vodafone.



Mobile Phone Providers: Total Mentions (Any Mobile Provider)

(Base: All adults who use a mobile phone – 975)

Q. Which company provides your main mobile phone service? Which other company, if any, provides your mobile phone service?



| Region | | | | Age | | |
|--------------|-------------------|----------------------------------|-------------------|-------------|-------------|-----------|
| Dublin (273) | Total Urban (629) | Total Urban (Excl. Dublin) (356) | Total Rural (346) | 18-35 (361) | 36-55 (370) | 55+ (244) |
| 43% | 45% | 47% | 61% | 42% | 54% | 60% |
| 30% | 25% | 20% | 29% | 30% | 28% | 17% |
| 35% | 31% | 28% | 13% | 31% | 22% | 17% |
| 18% | 14% | 10% | 3% | 13% | 9% | 7% |
| 5% | 5% | 5% | 8% | 5% | 6% | 8% |
| 5% | 5% | 3% | * | 5% | 3% | 2% |

NOTE: The above relates to main mobile phone provider AND other mobile phone providers used (where applicable)

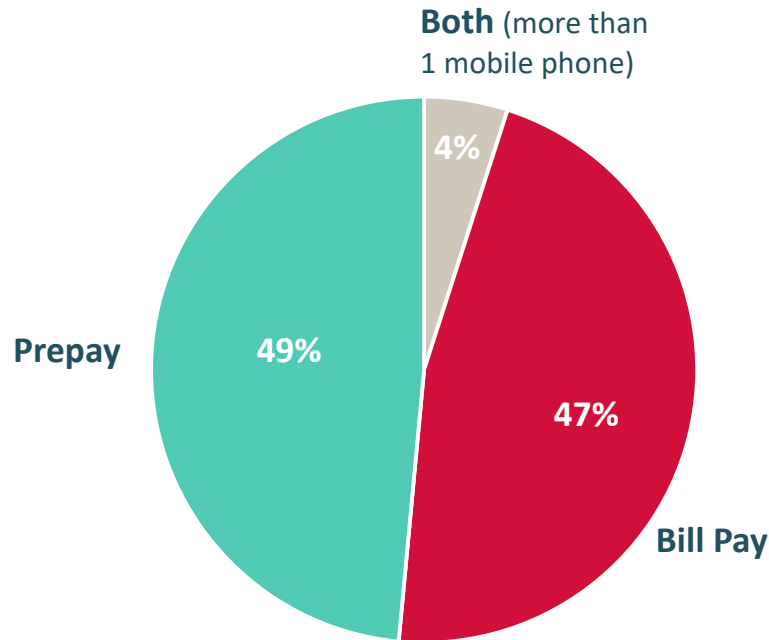
51% of mobile owners (mobile dongles not included) within the survey use Vodafone mobile services for any service which is held.



Mobile Phone Tariff of Main Mobile Phone

(Base: All adults who use a mobile phone - 975)

Q. Is your main mobile plan/package a prepay package (where you buy credit before you can make a call) or bill pay package (where you have a contract with your operator and subsequently receive a bill for calls, texts or other services you used in the previous month)?



| | Region | | | | Age | | |
|----------|--------------|-------------------|----------------------------------|-------------------|-------------|-------------|-----------|
| | Dublin (273) | Total Urban (629) | Total Urban (Excl. Dublin) (356) | Total Rural (346) | 18-35 (361) | 36-55 (370) | 55+ (244) |
| Prepay | 48% | 55% | 60% | 38% | 54% | 38% | 57% |
| Bill Pay | 40% | 38% | 38% | 61% | 40% | 56% | 41% |
| Both | 12% | 7% | 2% | 1% | 6% | 5% | 2% |

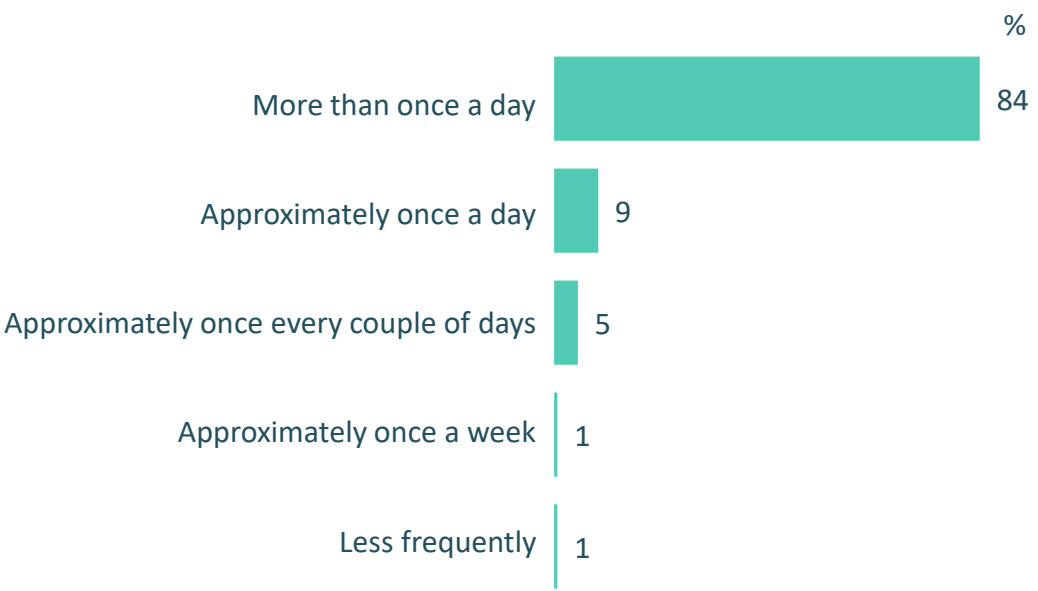
Among the mobile phone users identified in this survey, 49% have a Prepay service while 47% have a Bill Pay service.



Frequency of Usage of Mobile Phone

(Base: All adults who use a mobile phone - 975)

Q. And how often do you use your main mobile phone for making/receiving calls in your home?



| Mobile Phone Tariff | | Age | | |
|---------------------|----------|-------|-------|-----|
| | | 18-35 | 36-55 | 55+ |
| Prepay | Bill Pay | 87% | 87% | 74% |
| 77% | 90% | 10% | 7% | 11% |
| 12% | 6% | 2% | 5% | 9% |
| 7% | 2% | 2% | 5% | 9% |
| 1% | * | 1% | * | 2% |
| 2% | 1% | 1% | 1% | 4% |

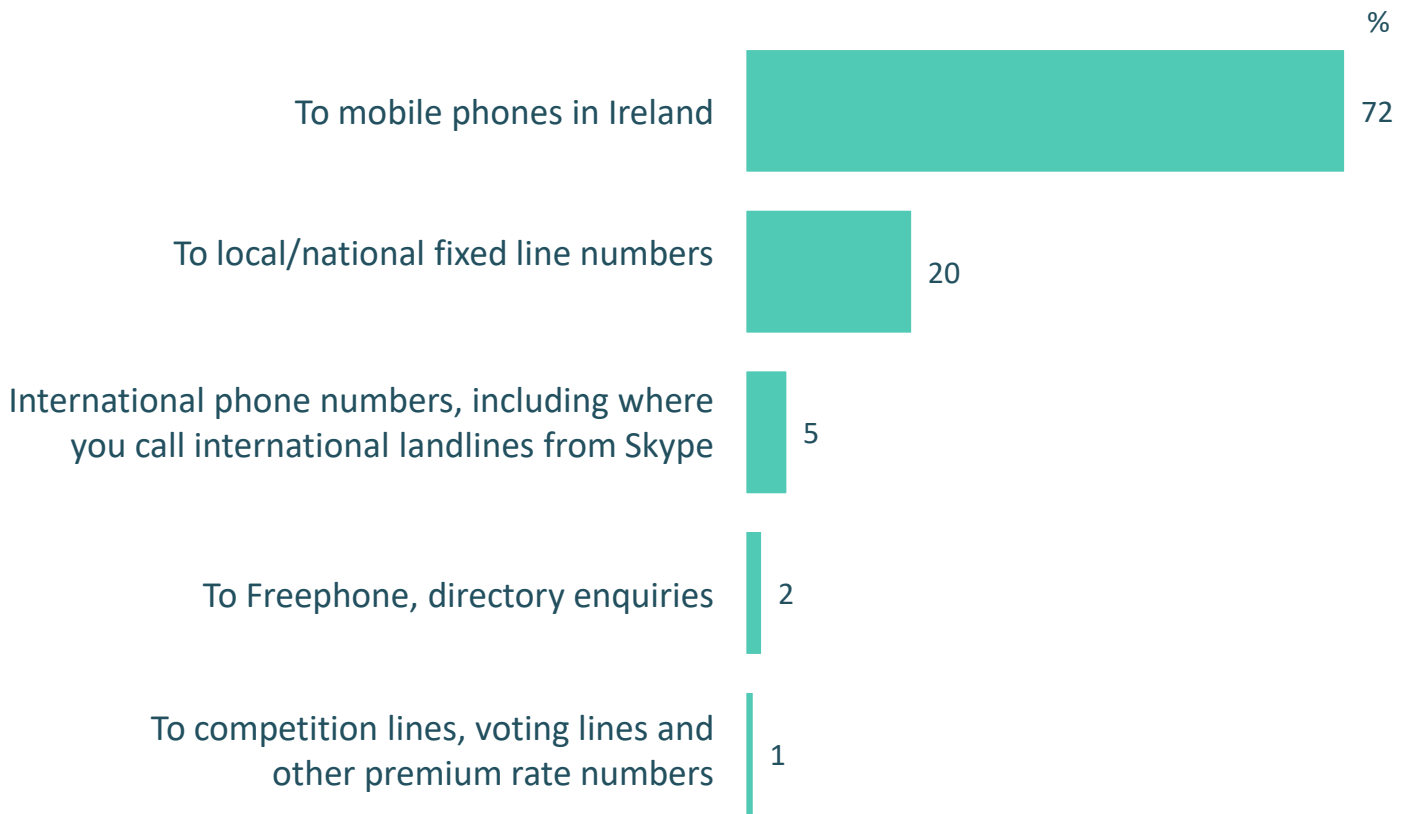
84% of mobile users that were surveyed use their mobile phone more than once per day – those on Bill Pay within the sample are the most frequent users (90%)



Percentage of Household Time Spent Calls Made from Mobile Phone To Each of the Following Call Types

(Base: All adults who use a mobile phone - 975)

Q. Thinking about the calls made from mobile phones in a typical month by all members of your home, please provide an approximate breakdown of the amount of time spent on household mobile phone(s) for each of the following?



| Fixed Line | |
|------------|----------|
| Yes (592) | No (345) |
| 70% | 75% |
| 21% | 18% |
| 6% | 5% |
| 2% | 2% |
| 1% | 1% |

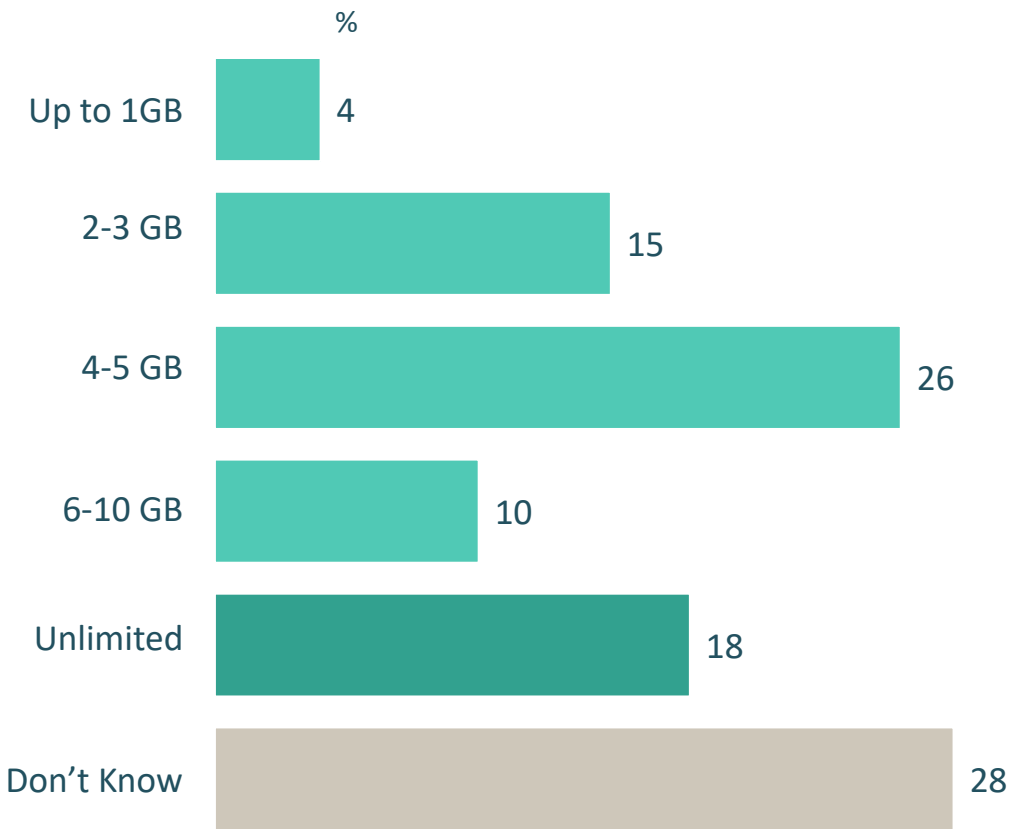
When estimating household time spent on different call types from a mobile phone, calls to other mobiles comes out highest at 72% of total time spent according to this survey.



What Is Data Allowance Per Month for Main Mobile (Bill Pay)

(Base: All adults who own a mobile phone on a post pay plan - 499)

Q. What is the data allowance within the standard cost per month on your MAIN mobile phone?



According to this survey, 28% of post pay mobile phone subscribers do not know the monthly data allowance within the standard cost of their phone per month. 18% have an unlimited data allowance.



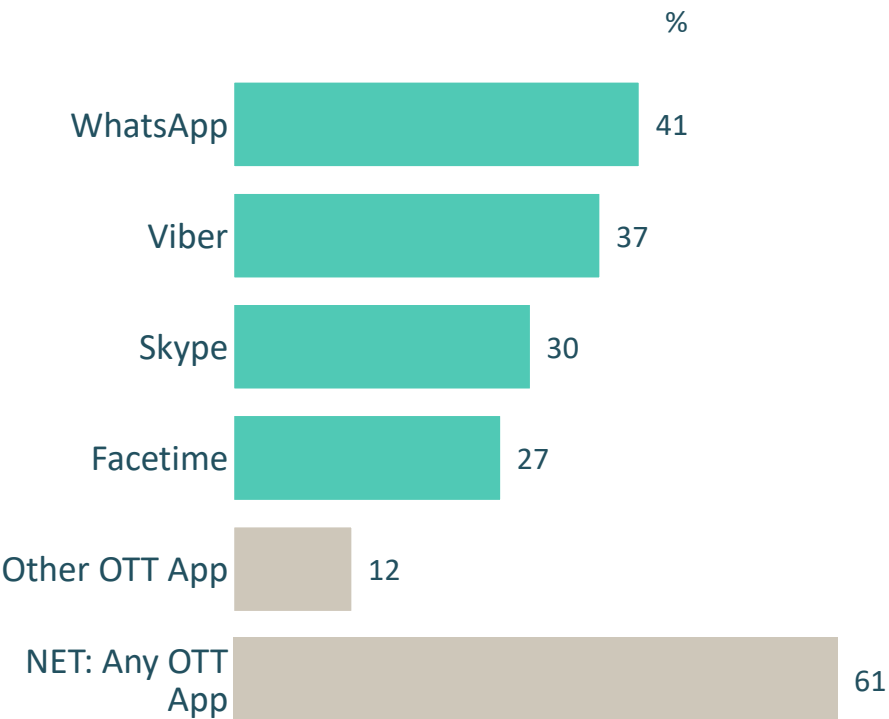


OTT & Instant Messaging

Usage of OTT Apps for Voice/Video Calls

(Base: All Telecommunication Decision Makers - 1,018)

Q. Do you use any of the following Apps for Voice or Video Calls in your home from a computer, laptop, tablet, or mobile smart phone (which need internet access to work)?



| Region | | | | Age | | |
|--------------|-------------------|----------------------------------|-------------------|-------------|-------------|-----------|
| Dublin (285) | Total Urban (662) | Total Urban (Excl. Dublin) (377) | Total Rural (356) | 18-35 (366) | 36-55 (377) | 55+ (275) |
| 63% | 44% | 29% | 37% | 59% | 43% | 15% |
| 40% | 36% | 33% | 38% | 52% | 39% | 13% |
| 38% | 32% | 27% | 28% | 41% | 32% | 14% |
| 29% | 28% | 27% | 25% | 47% | 23% | 6% |
| 16% | 13% | 10% | 11% | 20% | 10% | 4% |
| 72% | 63% | 56% | 59% | 82% | 66% | 27% |

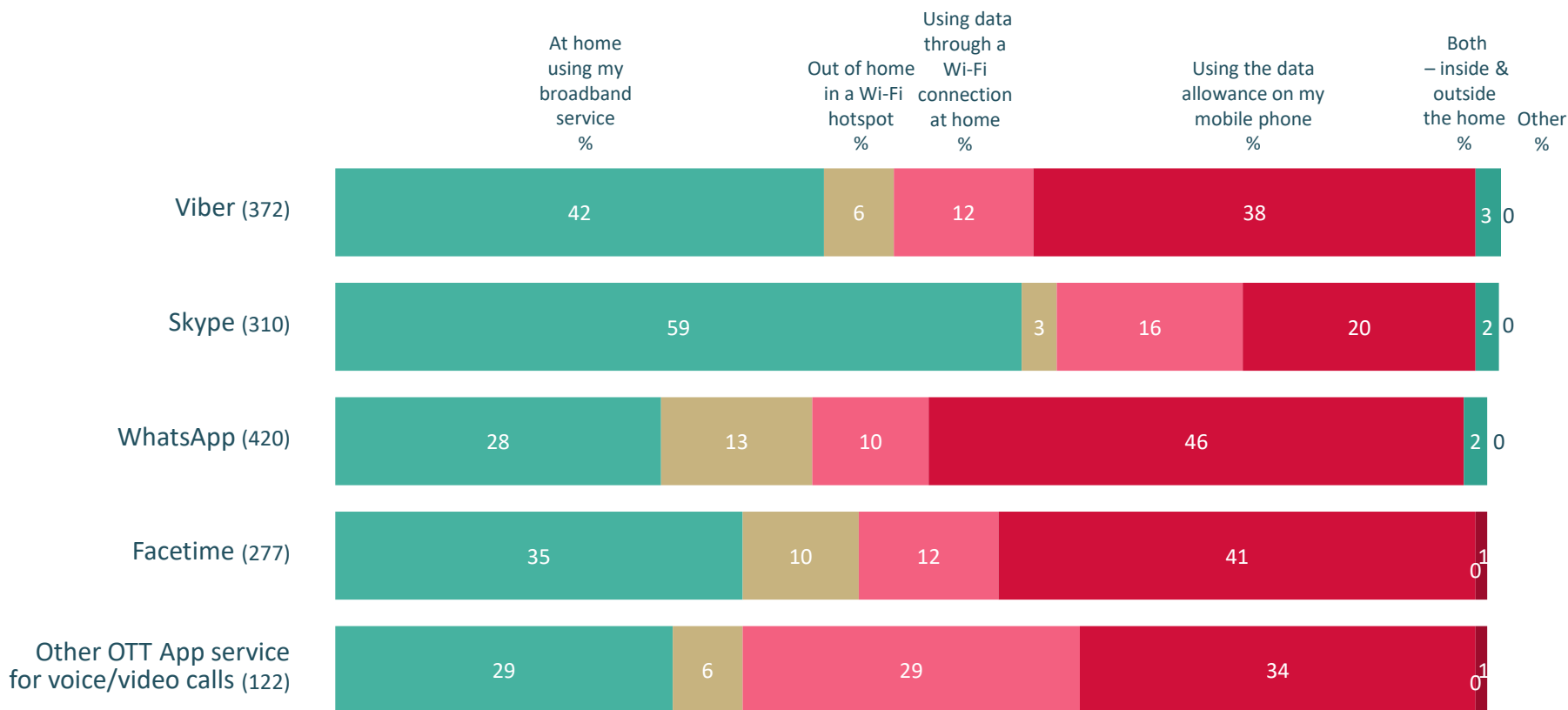
61% of the total survey sample use OTT apps for voice/video calls, rising to 72% in Dublin and 82% among 18-35 year olds. WhatsApp (41%) and Viber (37%) are the most popular OTT applications in this survey.



Method of Connecting to Internet for Voice/Video OTT Apps

(Base: All who used each method:
Base sizes displayed in brackets below)

Q. You mentioned that you use (insert each response above) for voice or video calls how do you mainly make these calls?



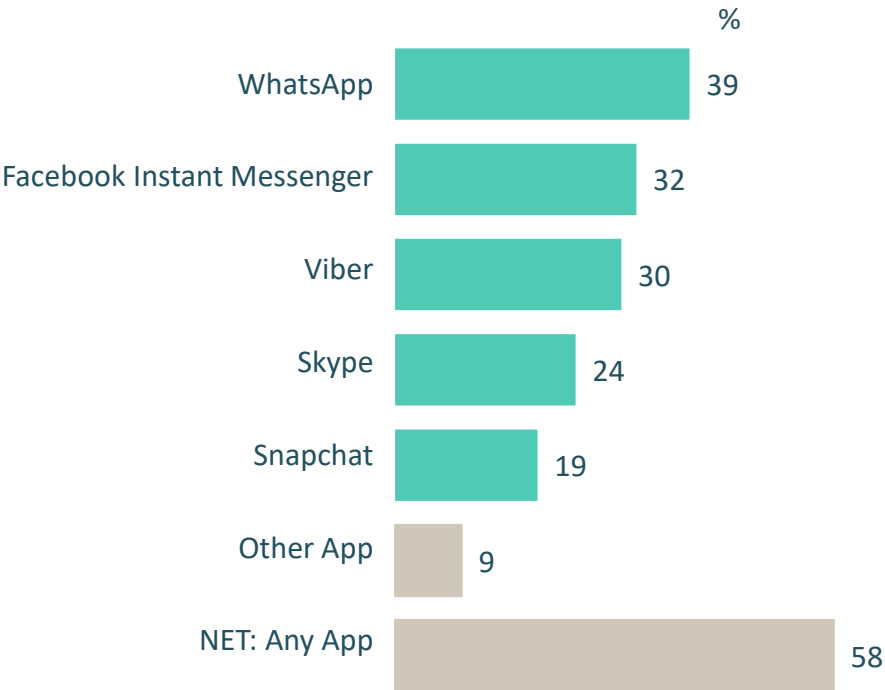
42% of those using Skype in this survey connect to the service via their home broadband, while 46% of WhatsApp users surveyed access the OTT app using the data allowance on their mobile phone.



Usage of OTT Apps for Instant Messaging

(Base: All Telecommunication Decision Makers - 1,018)

Q. Do you use any of the following Apps for instant messaging in your home from a computer, laptop, tablet, or mobile smart phone (i.e. over IP / Internet)?



| Region | | | | Age | | |
|--------------|-------------------|----------------------------------|-------------------|-------------|-------------|-----------|
| Dublin (285) | Total Urban (662) | Total Urban (Excl. Dublin) (377) | Total Rural (356) | 18-35 (366) | 36-55 (377) | 55+ (275) |
| 47% | 40% | 34% | 37% | 57% | 40% | 12% |
| 23% | 28% | 33% | 38% | 54% | 28% | 8% |
| 27% | 31% | 34% | 30% | 44% | 32% | 9% |
| 41% | 29% | 21% | 15% | 33% | 26% | 10% |
| 17% | 17% | 17% | 23% | 36% | 14% | 3% |
| 15% | 12% | 9% | 5% | 17% | 8% | 2% |
| 65% | 60% | 56% | 54% | 82% | 60% | 22% |

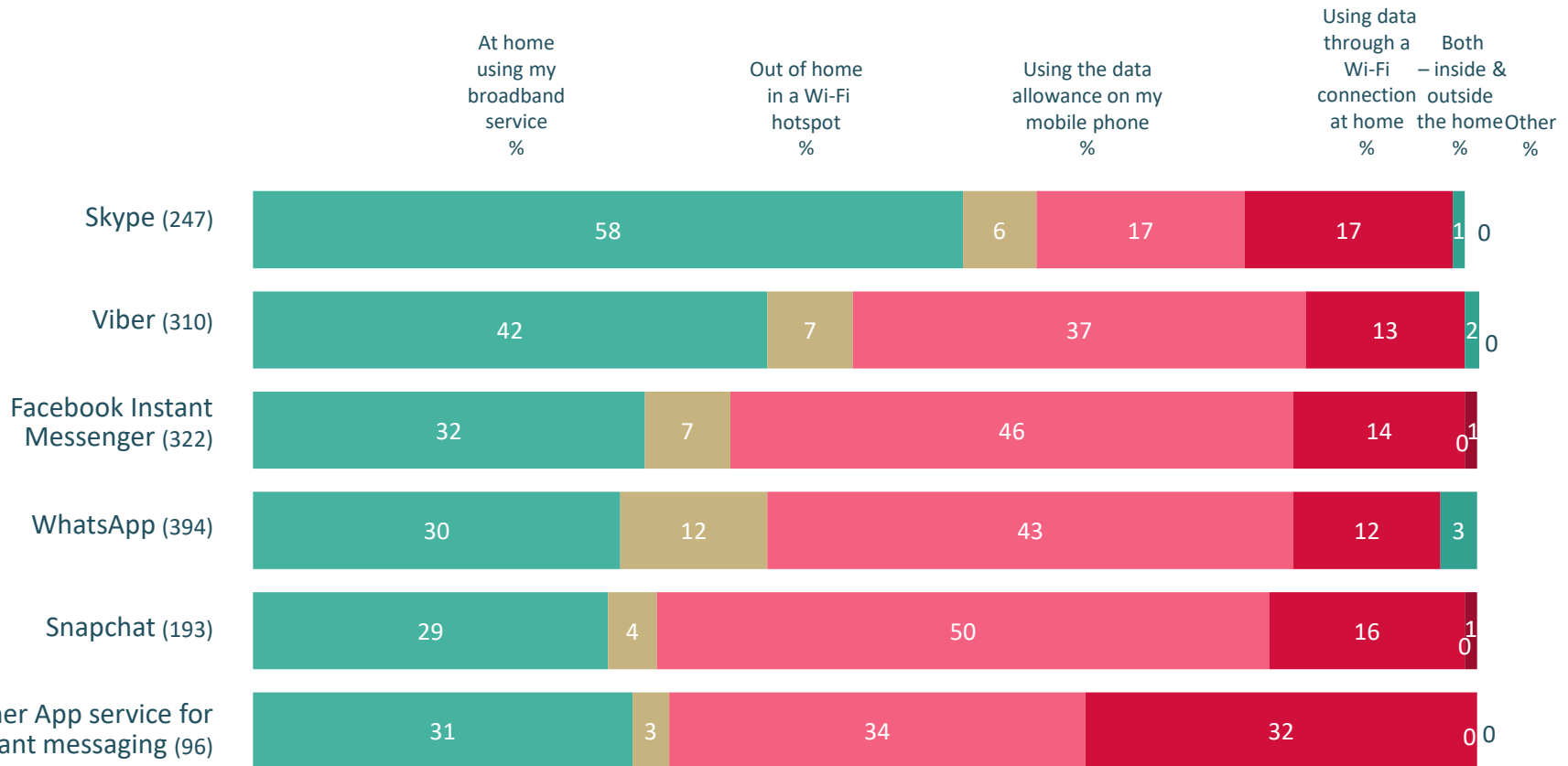
In terms of instant messaging, 39% of those surveyed use WhatsApp as a messenger, closely followed by the Facebook app (32%) and Viber (30%). Overall, 58% of our total sample use apps for sending messages, while amongst those aged 18-35 this figure rises to 82%.



Method of Connecting to Internet for Instant Messaging

(Base: All who used each method:
Base sizes displayed in brackets below)

Q. You mentioned that you use (insert each response above) for instant messaging how do you mainly send these messages?



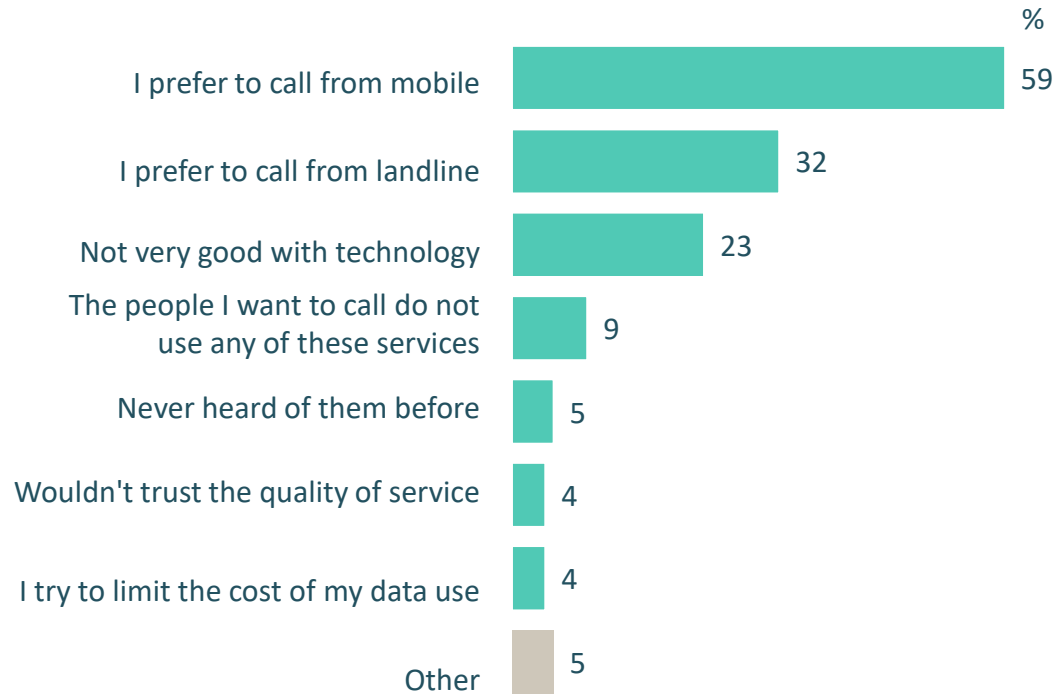
Users of Skype and Viber for instant messaging in this survey are most commonly connected via broadband at home (58% and 42% respectively).



Reasons For Not Using OTT Apps for Voice Calls

(Base: All respondents who do not use any apps for voice/video calls- 392)

Q. Why do you not use any of these types of app services for voice calls?



| Age | | |
|---------------|----------------|--------------|
| 18-35 (65) | 36-55 (127) | 55+ (200) |
| 65% | 71% | 49% |
| 5% | 19% | 49% |
| 11% | 21% | 27% |
| 5% | 9% | 10% |
| 0 | 5% | 6% |
| 1% | 5% | 5% |
| 11% | 3% | 2% |
| 16% | 2% | 3% |

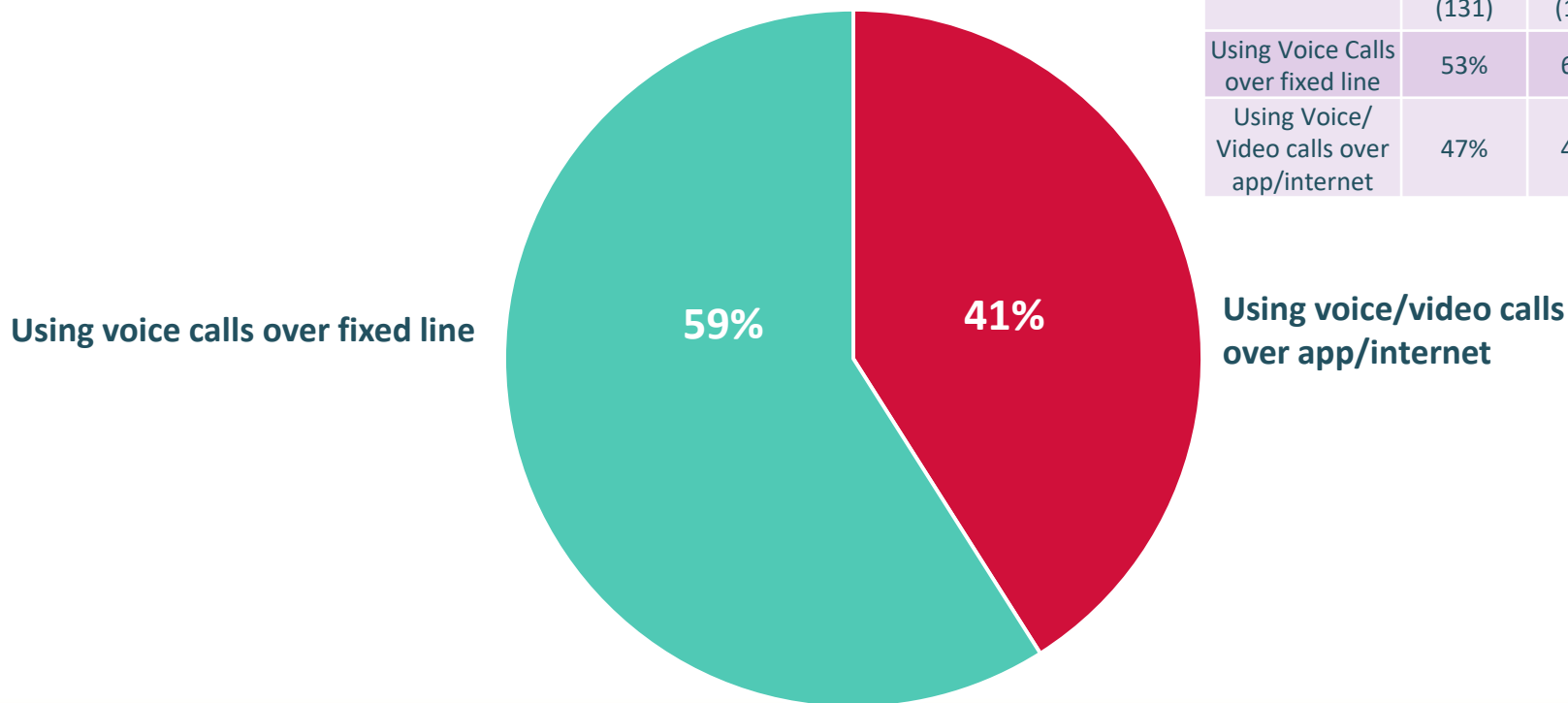
Amongst those in the survey that do not use OTT apps for voice/video calls, the main barrier to OTT app use for them is preference; 59% say they prefer standard mobile calls, while 32% rather calling from their landline.



Estimate of Percentage of Calls Made Within Ireland Using Traditional Calls Over Fixed Line and Using OTT Apps/Internet (Base of App Users Only)

(Base: All With Fixed Line and Using Apps for Voice and Video Calls - 372)

Q. Thinking about all of the calls that you make to someone in Ireland (in percentage terms), how much do each of the following types of call account for? Please estimate if unsure.



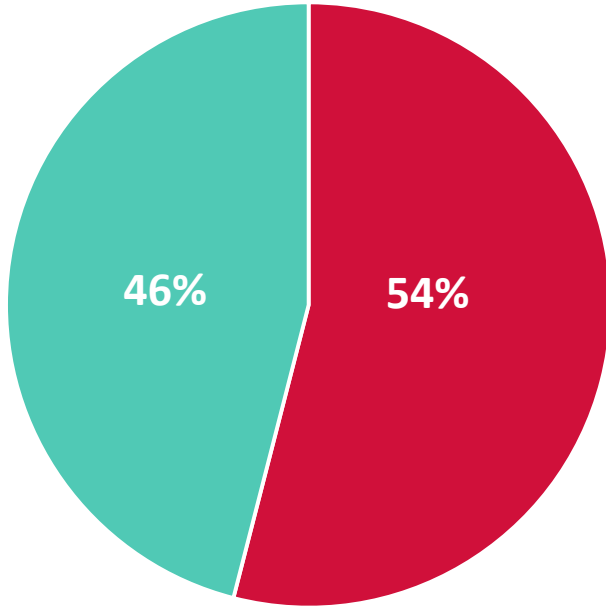
In terms of calls made within Ireland by users of OTT Apps, 41% of these calls are estimated to be made through OTT App while 59% are still made using traditional fixed line according to this survey.



Estimate of Percentage of Calls Made Internationally Using Traditional Fixed Line and Using OTT Apps/Internet (Base of App Users Only)

(Base: All With Fixed Line and Using Apps for Voice and Video Calls - 372)

Q. Now thinking specifically about international calls that you may make, in percentage terms, how much do each of the following types of call account for in relation to international calls made? Please answer bearing in mind that the total must be 100%? Please estimate if unsure.



| | Age | | |
|---|----------------|----------------|-------------|
| | 18-35 (109) | 36-55 (148) | 55+ (62) |
| Using Voice Calls over fixed line | 43% | 45% | 56% |
| Using Voice/Video calls over app/internet | 57% | 55% | 44% |

Using voice calls over fixed line

Using voice/video calls over app/internet

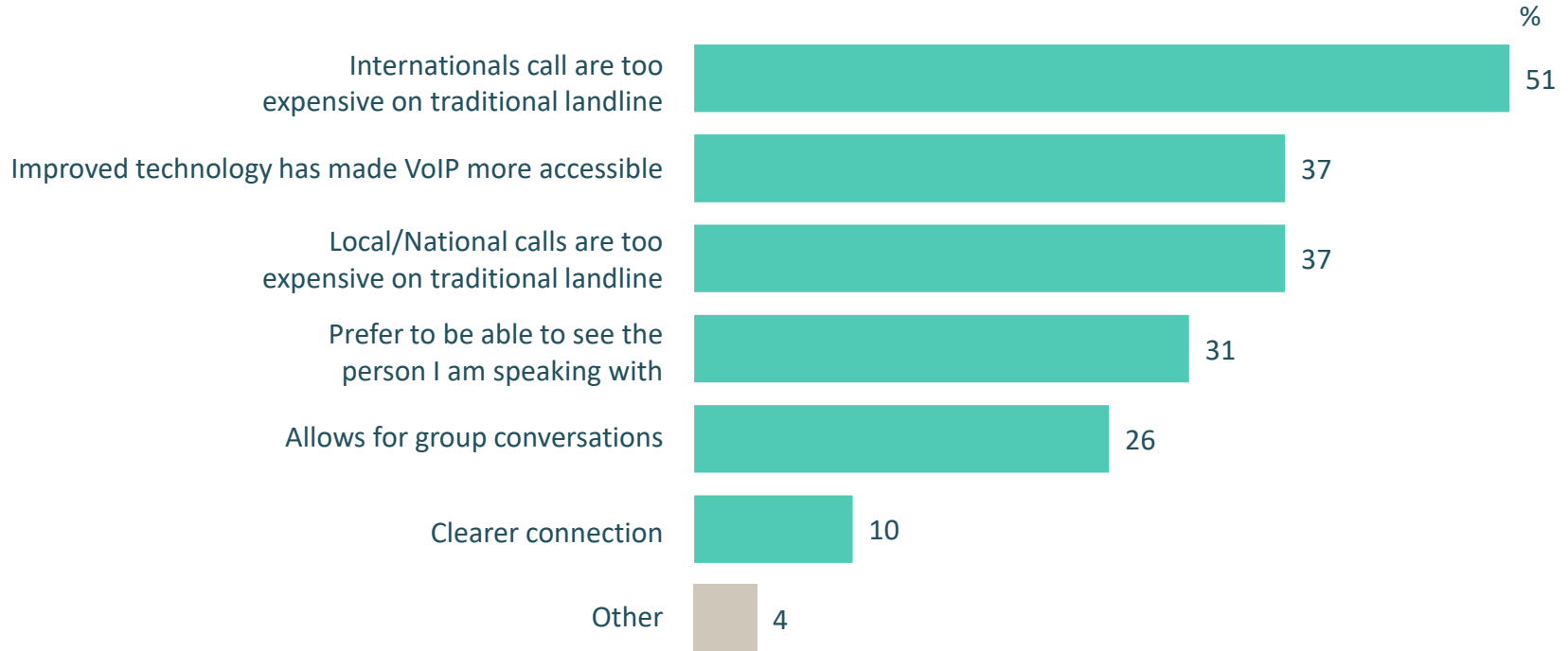
Amongst OTT app users surveyed, on average, 54% of their international calls are made via internet apps while 46% of these calls are made using fixed line.



Reasons For Making Calls Over the Internet

(Base: All respondents who use any apps for voice/video calls- 372)

Q. Why do you choose to make calls over the internet or calls using data over the traditional means of making calls on a landline?



In terms of those respondents using OTT apps for calls, the principal driver for doing this is price, with 51% saying that international phone calls are too expensive and 37% saying local/national calls are too expensive. Improved technology also plays a role, 37% stating this as a reason.





Calling Patterns From Landline Phone

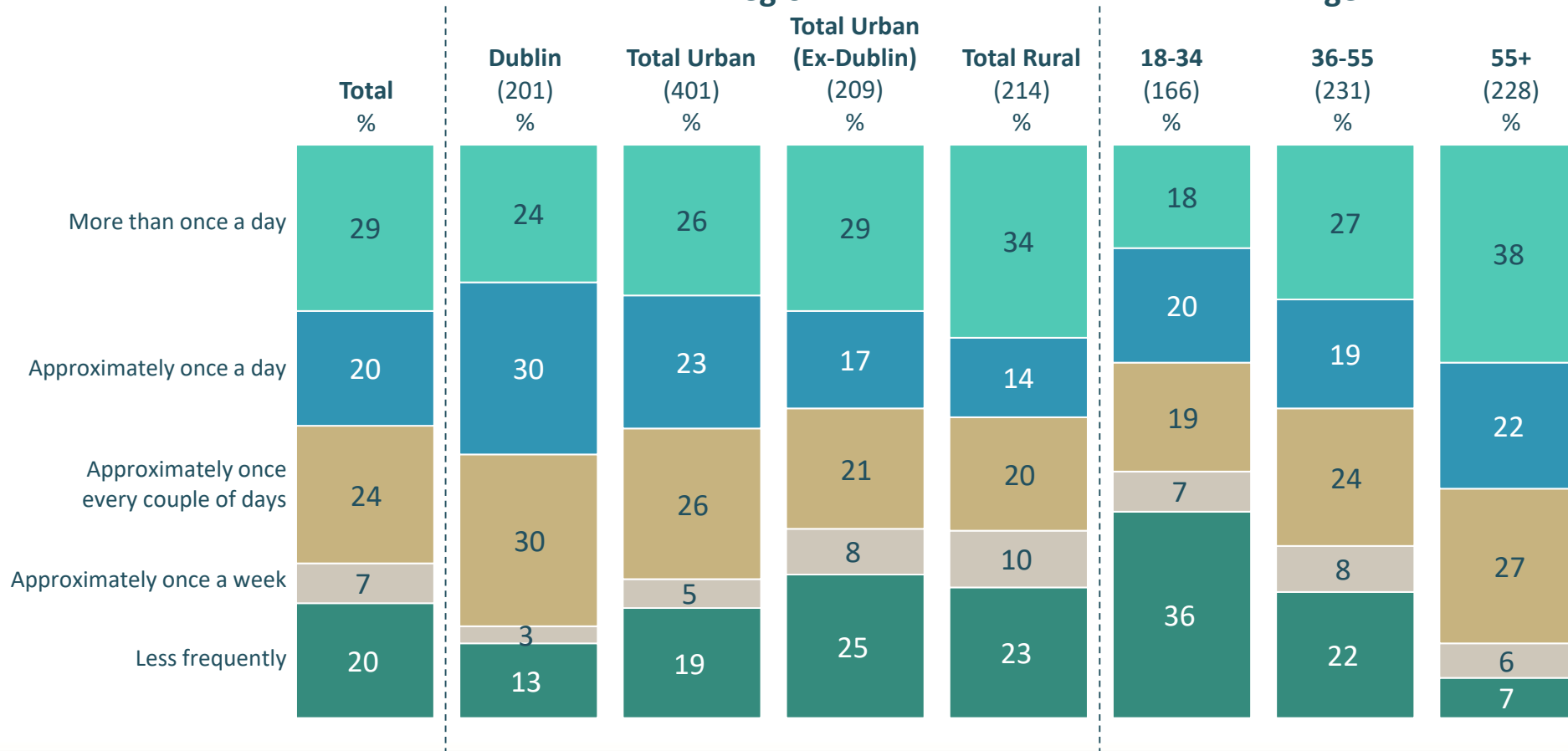
Frequency of Usage of Fixed Line

(Base: All confirming they have fixed line - 625)

Q. How often do you use your fixed line phone for making/receiving calls?

Region

Age



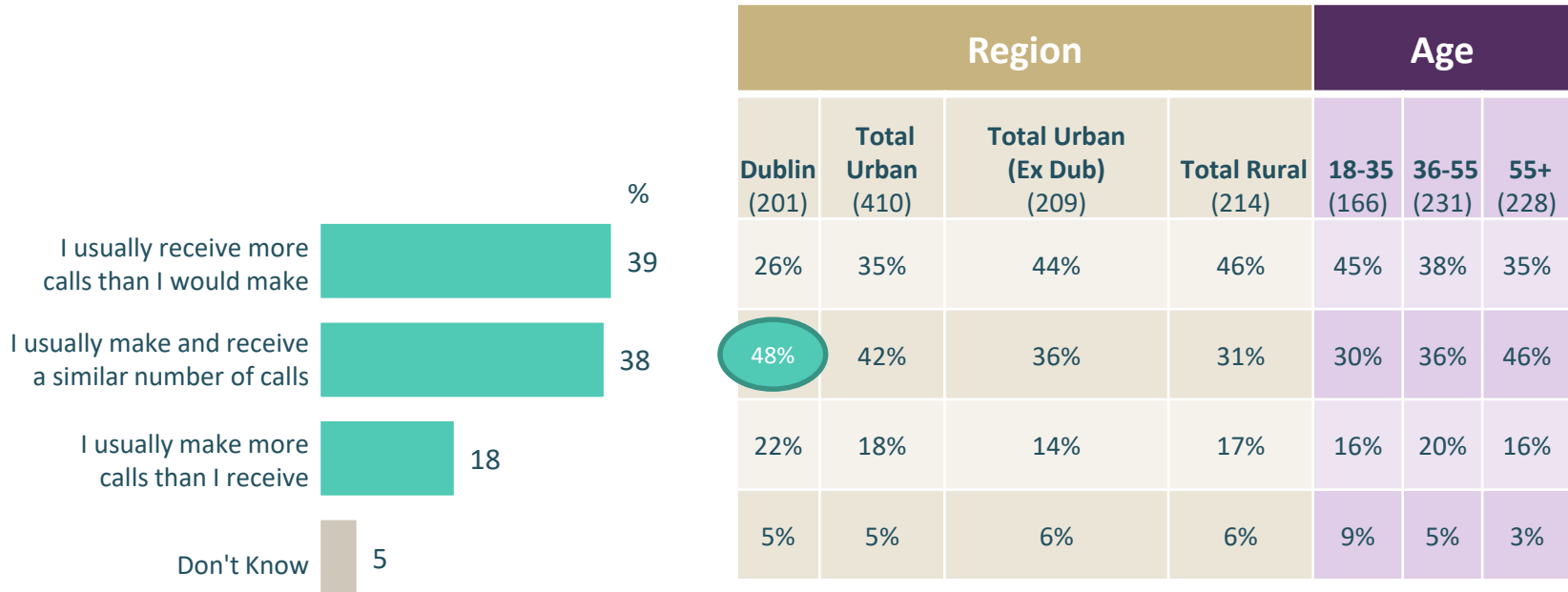
29% of fixed line owners in this survey use their fixed line multiple times per day, higher in rural areas (34%) and amongst those aged 55+ (38%).



Usage: Making and Receiving Calls on Fixed Line Phone

(Base: All confirming they have fixed line - 625)

Q. Thinking about the calls you make and receive on your fixed line phone, which of the following best describes your usage in a typical month?



39% of fixed line owners surveyed receive more calls than they make, while an additional 38% say they generally make and receive the same amount of calls.



Access Mode Used for Range of Call Types

(Base: All confirming they have fixed line - 625)

Q. Thinking about the categories of calls you make from your home, please select what you would primarily use for each of the following types of calls. If there are several options which you would primarily use, please select multiple options

| Call Types | From Fixed Line Phone In Your Home | From Mobile Phone | From Viber | From Skype | From Whatsapp | From Facetime | From Other App Service For Voice/ Video Calls | Use Any Access Type - No Preference |
|--|------------------------------------|-------------------|------------|------------|---------------|---------------|---|-------------------------------------|
| Calls to local fixed line phones | 79% | 26% | 2% | 1% | 2% | * | 1% | 3% |
| Calls to national fixed line phones | 74% | 27% | 2% | 1% | 2% | * | 1% | 5% |
| Calls to international numbers | 51% | 25% | 10% | 15% | 11% | 6% | 2% | 13% |
| Calls to directory enquires | 35% | 19% | 2% | * | 4% | * | 1% | 44% |
| Calls to 1800 numbers | 35% | 18% | 1% | * | 4% | 0 | * | 45% |
| Calls to (callsave) 1850 or (lo-call) 1890 numbers | 35% | 18% | 1% | * | 4% | * | * | 44% |
| Calls to premium rate numbers such as competition lines, quiz shows, horoscope, etc. | 32% | 18% | 2% | * | 4% | 0 | * | 48% |
| Calls to mobile phones on a different network to your mobile phone | 19% | 79% | 5% | 3% | 7% | 2% | 1% | 5% |
| Calls to mobile phones on the same network as your mobile phone | 17% | 86% | 3% | 1% | 5% | 2% | 1% | 3% |

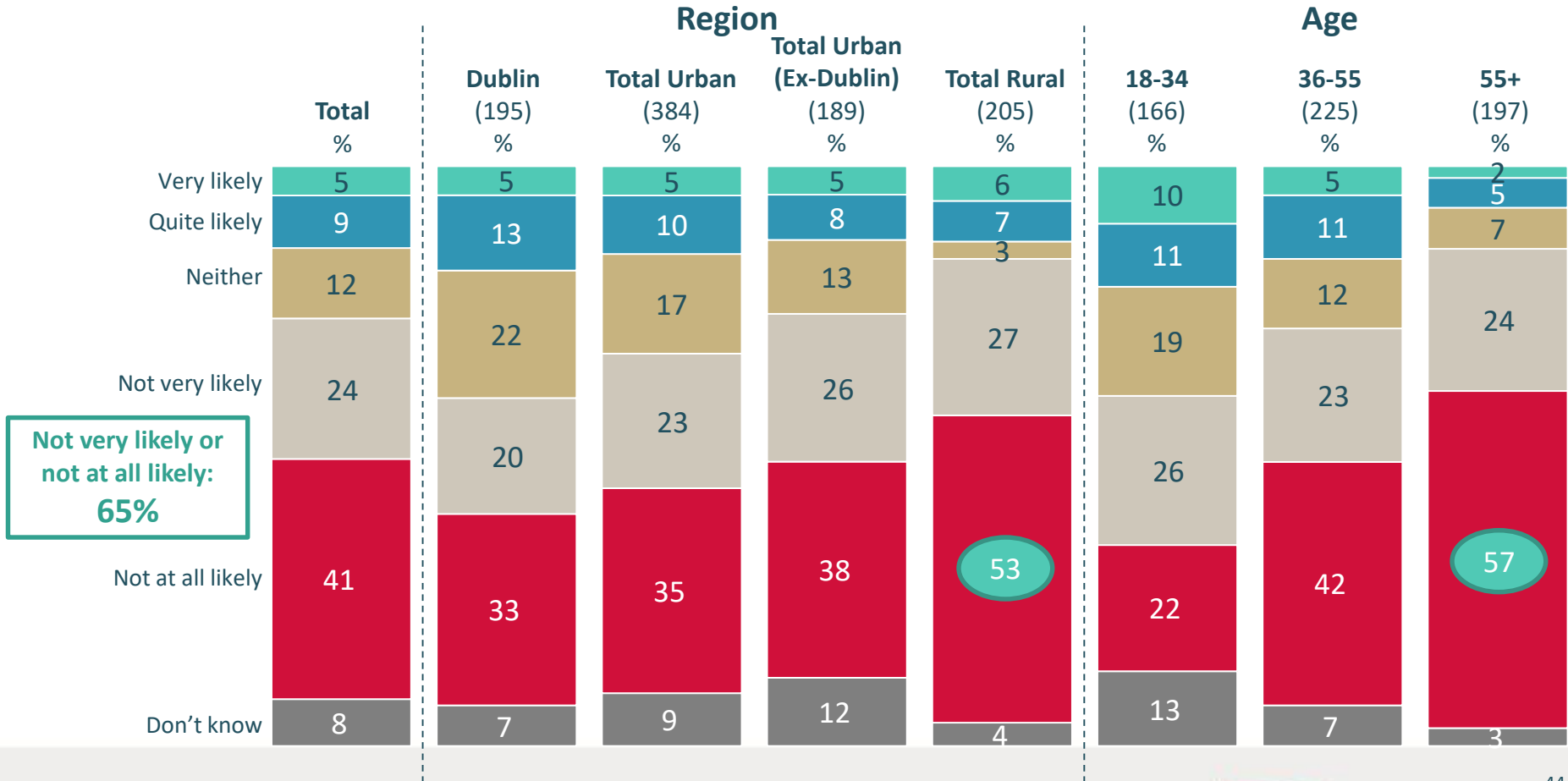
Amongst the survey sample of fixed line owners, the most common calls made from a fixed line are to other fixed lines, both local (79%) and national (74%). In terms of calls from mobile, in this survey, calls to other mobiles, same network(86%) and different networks (79%) are made most often.



Likelihood of Cancelling Landline Service and Using Mobile Phone Instead

(Base: All using fixed line and mobile phone – 589)

Q. Would you consider cancelling your fixed line service and instead make/receiving all of your calls via your mobile phone?



Not very likely or not at all likely: 65%

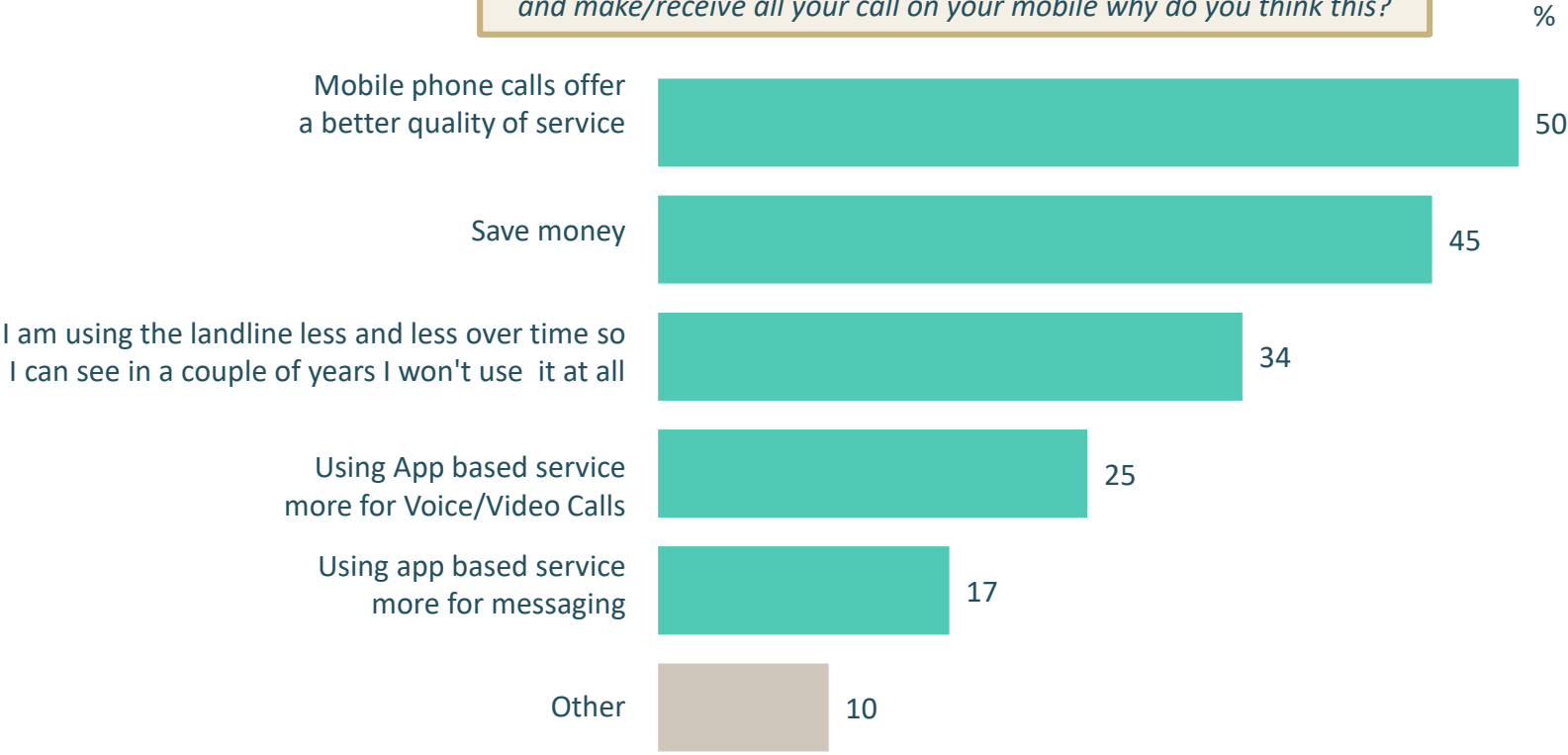
65% of respondents with fixed and mobile phones say they are not very or not at all likely to cancel their landline and opt for mobile only. However, 14% are considering this scenario (quite likely or very likely).



Why Consider Cancellation of Fixed Line and Use Mobile Phone Instead?

(Base: All quite or very likely to cancel fixed line and use mobile instead – 85)

Q. You mentioned you would cancel your fixed line voice subscription and make/receive all your call on your mobile why do you think this?



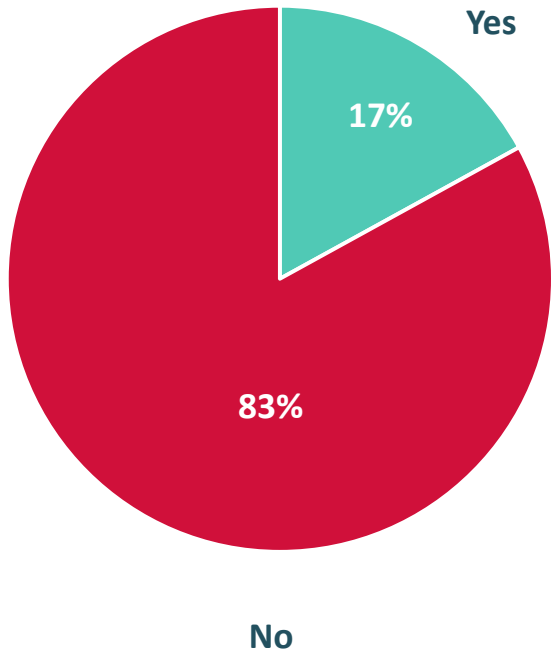
Amongst those in the survey saying that they are quite or very likely to cancel their fixed line service and use mobile instead, the main drivers for this are call quality (50%) and cost efficiency (45%).



Avail of Service Where Landline Calls are Automatically Transferred to Your Mobile

(Base: All using fixed line and mobile phone - 589)

Q. Do you avail of a service whereby if there is no answer on your landline when called, then the call to you automatically transfers to your mobile?



| | Region | | | | Age | | |
|-----|--------------|-------------------|----------------------------------|-------------------|-------------|-------------|-----------|
| | Dublin (195) | Total Urban (384) | Total Urban (Excl. Dublin) (189) | Total Rural (205) | 18-35 (166) | 36-55 (225) | 55+ (297) |
| Yes | 24% | 15% | 7% | 19% | 18% | 18% | 15% |
| No | 76% | 85% | 93% | 81% | 82% | 82% | 85% |

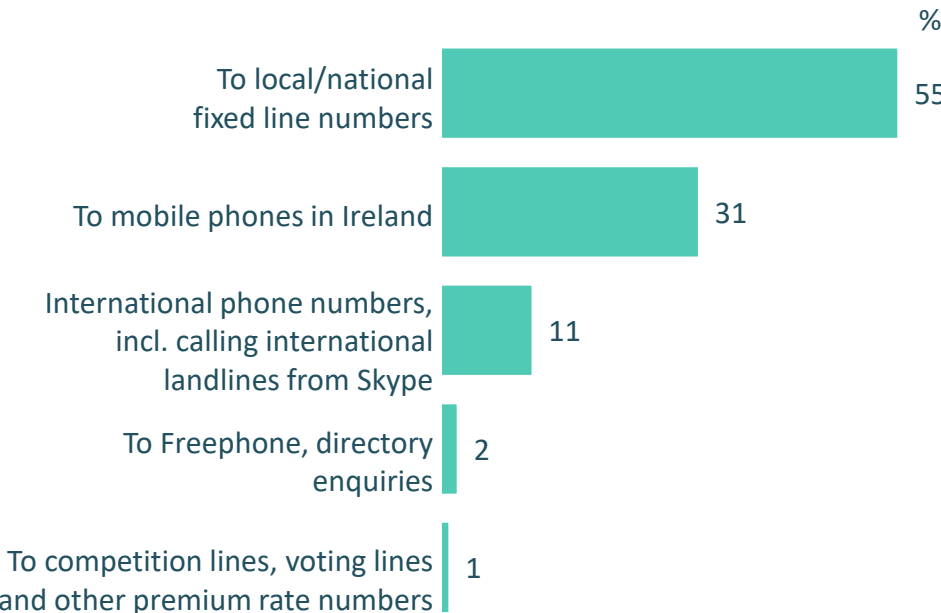
17% of owners of both landline and mobile that were surveyed say that they use a call redirect service for when they are unable to answer their landline – this is most popular among those living in Dublin (24%)



Proportion of Time Spent Calling From Fixed Line To Following Numbers in a Typical Month

(Base: All confirming they have fixed line - 625)

Q. Thinking about the calls made from your fixed line phone in a typical month by all members of your home, please provide an approximate breakdown of the amount of time spent on the household fixed line phone for each of the following?



| Region | | | | Age | | |
|--------------|-------------------|----------------------------------|-------------------|-------------|-------------|-----------|
| Dublin (212) | Total Urban (397) | Total Urban (Excl. Dublin) (185) | Total Rural (206) | 18-35 (136) | 36-55 (225) | 55+ (242) |
| 63% | 61% | 59% | 45% | 52% | 55% | 57% |
| 22% | 25% | 29% | 41% | 32% | 31% | 29% |
| 11% | 10% | 10% | 12% | 11% | 11% | 11% |
| 3% | 3% | 2% | 2% | 3% | 2% | 2% |
| 2% | 1% | 1% | 0% | 2% | 1% | 1% |

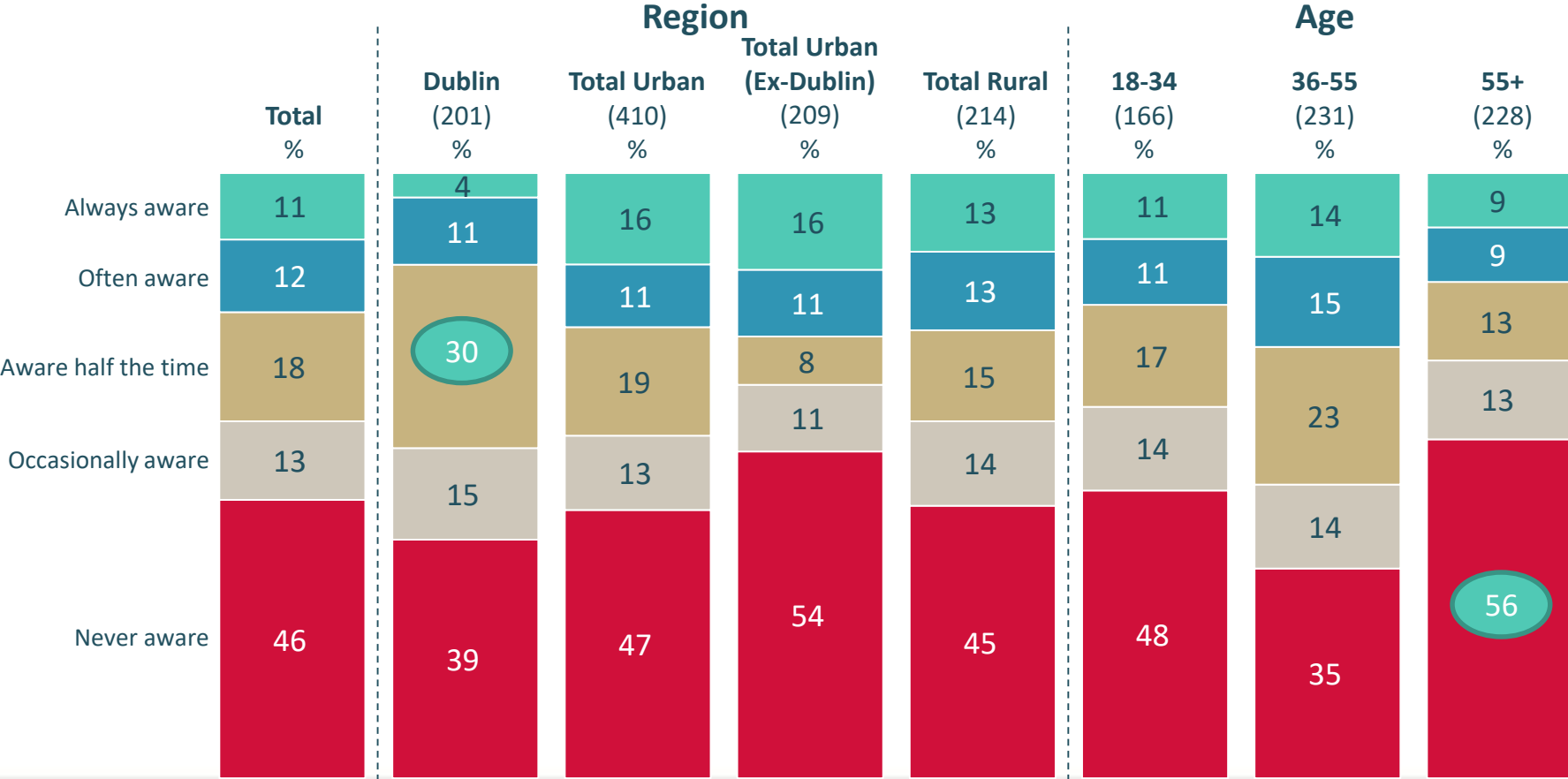
Amongst fixed line owners in the survey, 55% of calls made from their landline are to other fixed lines, with 31% of their calls made to mobile numbers.



Awareness of Landline Caller Provider (When Landline Call is Received to Landline)

(Base: All confirming they have fixed line - 625)

Q. When you receive a call to your fixed line phone from another fixed line phone, do you know the identity of the landline provider where the call is been made from?



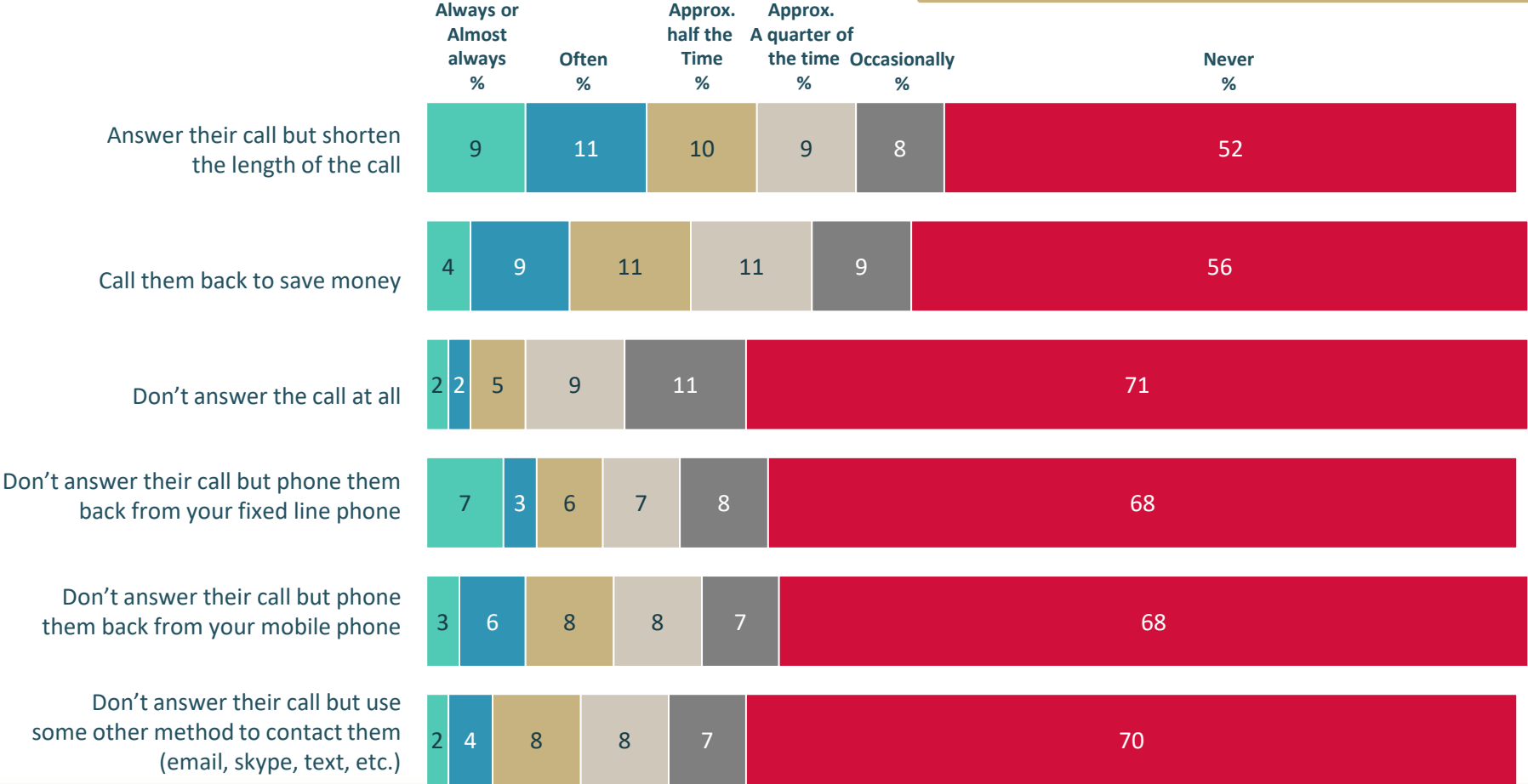
23% of landline owners in this survey always or often know the identity of the landline caller's provider, but 46% say they are never aware.



Actions Taken When Receiving a Call on Landline From a Landline on Another Network

(Base: All adults using fixed voice with any awareness of calling party's network - 336)

Q. When you receive a call to your landline from a landline who is on a different network which of the following actions are you likely to take in this situation?



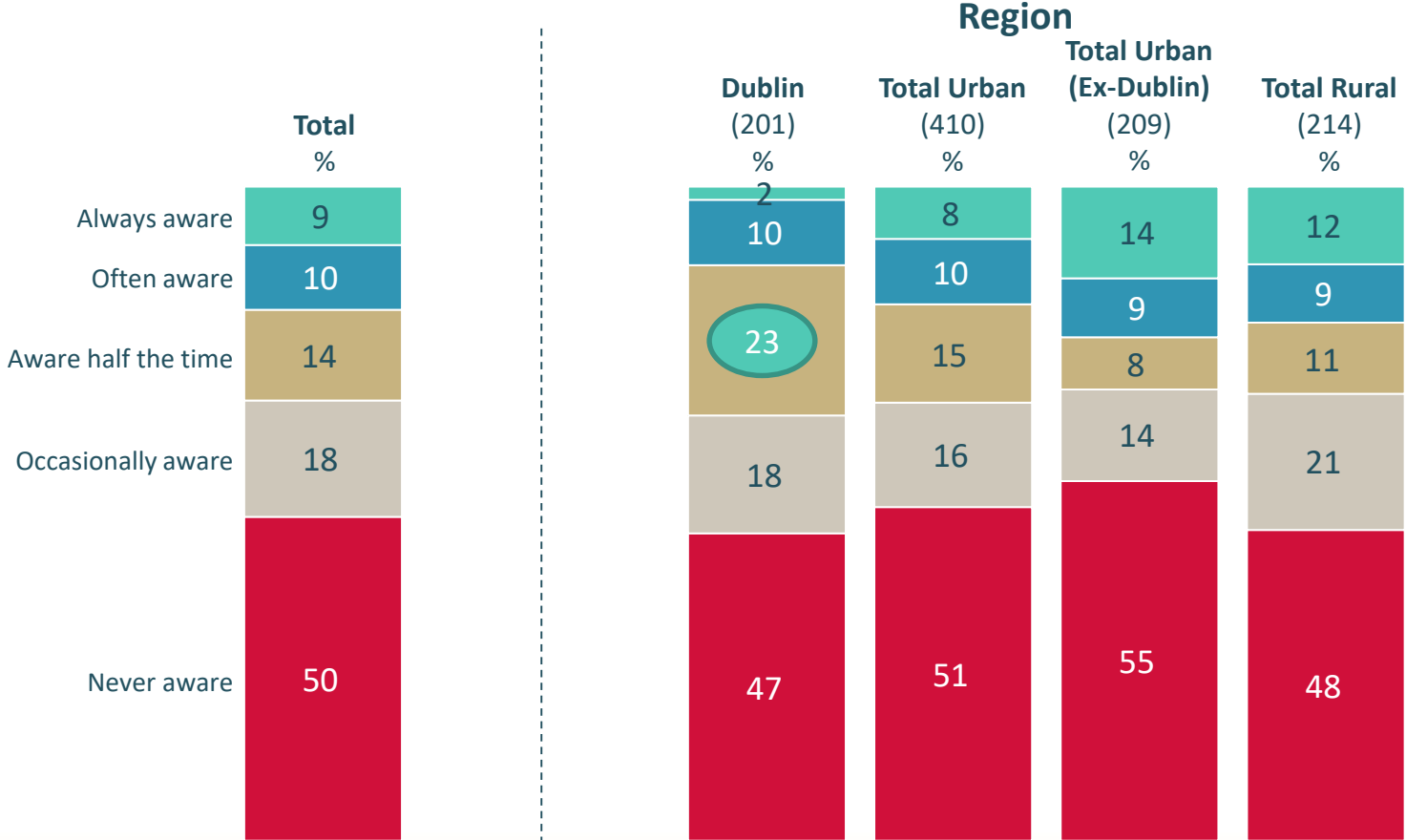
21% of those with any awareness of the caller's landline provider when receiving a call to their fixed line will often, almost always or always shorten the call when receiving a call from a landline on another network. The majority of this sample are likely to not take any action in light of this circumstance.



Awareness of Mobile Caller Provider (When Mobile Call is Received to Landline)

(Base: All confirming they have fixed line - 625)

Q. If someone is calling you on your fixed line phone from a mobile phone, to what extent do you know what mobile network they are calling from?



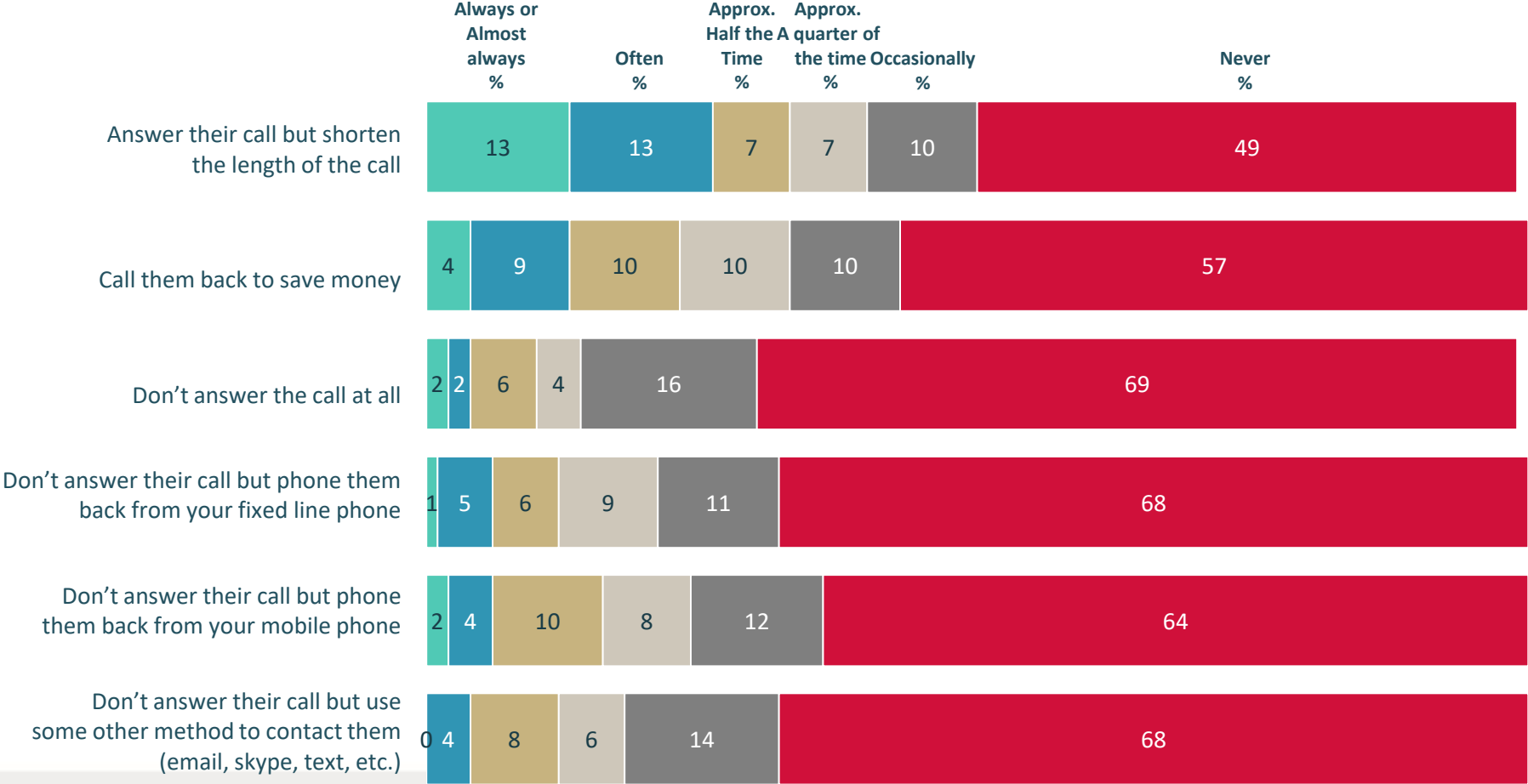
50% landline owners in the survey say that they never know what mobile network the person calling is on when receiving a call on their landline, however 19% say that they are always or often aware.



Actions Taken When Receiving a Call on Landline From a Mobile Phone

(Base: All adults using fixed voice with any awareness of calling party's network - 313)

Q. When you receive a call to your landline from a mobile and you are aware which mobile network the caller is calling from which of the following actions are you likely to take in this situation...?



26% of those with any awareness of the caller's mobile provider when receiving a call to their fixed line say that they would often, almost always or always answer the call but would keep it to a minimum when receiving a call on a landline from a mobile phone.



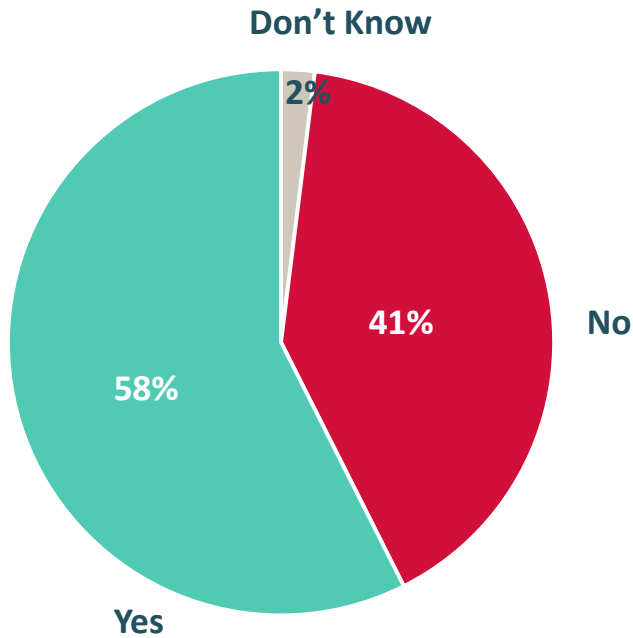


Bundles & Costs

Bundle Usage

(Base: All Telecommunication Decision Makers - 1,018)

Q. I would like you to think back to when you last purchased any telecommunications services. Did you purchase more than one of these services as part of an overall price? Commonly called a 'bundle price' i.e. Multiple services bought in a bundle from the same service provider for an overall price.



| | Region | | | | Age | | |
|------------|--------------|-------------------|----------------------------------|-------------------|-------------|-------------|-----------|
| | Dublin (285) | Total Urban (662) | Total Urban (Excl. Dublin) (377) | Total Rural (356) | 18-35 (366) | 36-55 (377) | 55+ (275) |
| Yes | 82% | 62% | 47% | 50% | 53% | 62% | 58% |
| No | 17% | 37% | 52% | 48% | 44% | 37% | 41% |
| Don't Know | 2% | 1% | 1% | 3% | 3% | 1% | 2% |

| | Social Class | |
|------------|--------------|-------------|
| | ABC1 (468) | C2DEF (550) |
| Yes | 66% | 51% |
| No | 33% | 48% |
| Don't Know | 2% | 2% |

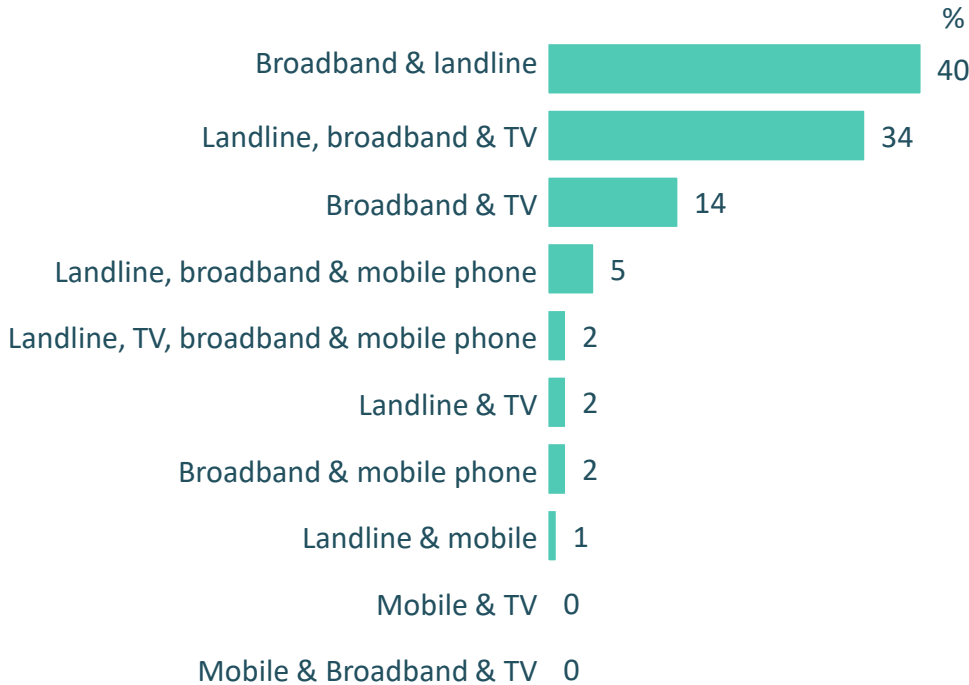
When purchasing telecommunications services, 58% of our total sample bought multiple products as a bundle. Those in the sample living in Dublin have significantly higher incidence of bundle purchase (82%).



Total Bundle Types Purchased

(Base: All who have a bundle - 586)

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



| Region | | | | Age | | | Social Class | |
|--------------|-------------------|----------------------------------|-------------------|-------------|-------------|-----------|--------------|-------------|
| Dublin (233) | Total Urban (409) | Total Urban (Excl. Dublin) (177) | Total Rural (177) | 18-35 (193) | 36-55 (234) | 55+ (159) | ABC1 (307) | C2DEF (279) |
| 19% | 32% | 48% | 60% | 34% | 38% | 51% | 40% | 41% |
| 53% | 42% | 27% | 17% | 31% | 38% | 32% | 37% | 31% |
| 21% | 18% | 14% | 4% | 23% | 13% | 3% | 11% | 17% |
| 1% | 2% | 4% | 11% | 3% | 6% | 6% | 5% | 4% |
| 2% | 2% | 2% | 4% | 3% | 2% | 2% | 1% | 4% |
| 3% | 3% | 2% | 0 | 1% | 2% | 4% | 3% | 1% |
| * | 1% | 2% | 3% | 3% | 1% | 1% | 1% | 2% |
| * | 1% | 1% | * | 1% | * | 1% | 1% | * |
| 1% | * | 0 | 1% | 1% | 0 | 0 | 1% | 0 |
| * | * | 0 | 0 | 1% | 0 | 0 | 0 | * |

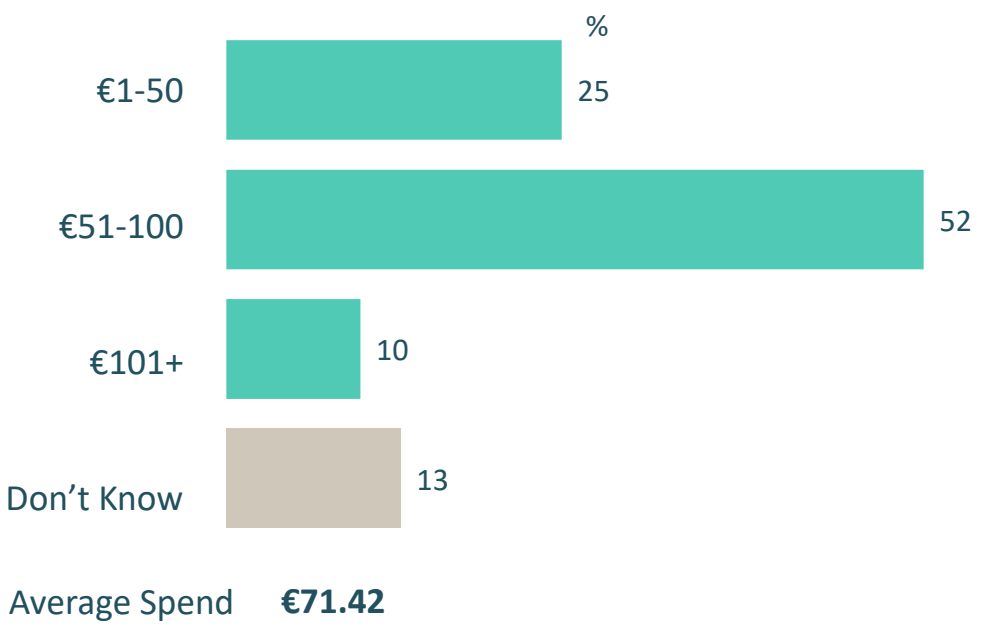
Amongst those in the survey that have a bundle, Broadband & Landline bundles are the most common (40%), particularly in rural areas (60%).



Amount Spent on Bundle per Month

(Base: All who have a bundle - 586)

Q. How much do you pay per month for your bundle service?



| Bundle Type | |
|----------------------------|--------------------------------|
| Landline & Broadband (236) | Landline, Broadband & TV (200) |
| 42% | 12% |
| 40% | 56% |
| 2% | 22% |
| 16% | 10% |
| €55.54 | €86.90 |

(Note: Base of other bundle options too small to show)

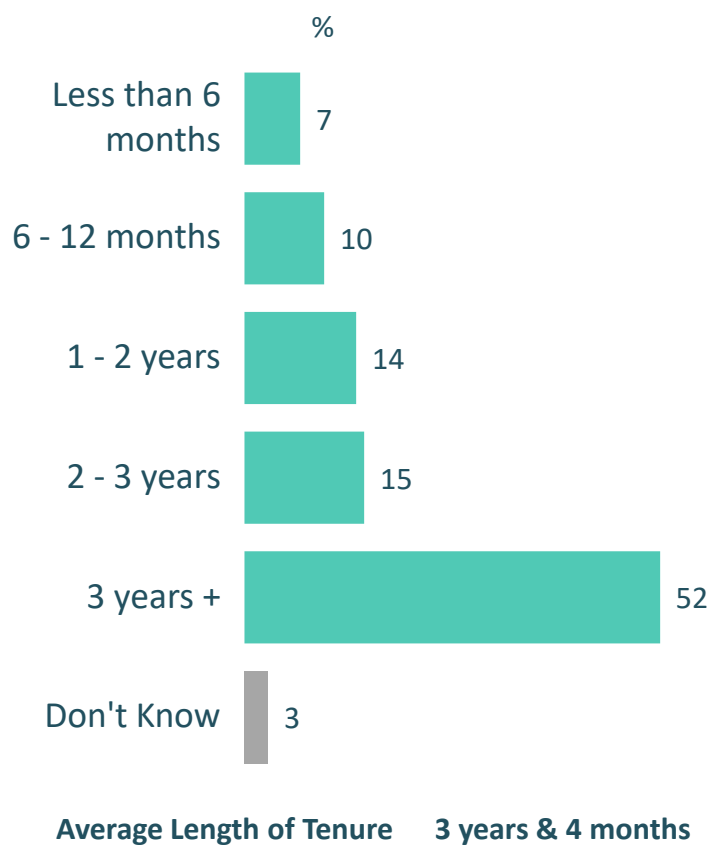
Over half (52%) of bundle owners surveyed spend between €51-€100 per month on their package.



Length of Bundle Subscription

(Base: All who have a bundle, 586)

Q. How long ago did you subscribe to your bundle?



| Region | | | | Age | | | Bundle | |
|--------------|-------------------|----------------------------------|-------------------|-------------|-------------|-----------|---------------|-------------------|
| Dublin (233) | Total Urban (409) | Total Urban (Excl. Dublin) (177) | Total Rural (177) | 18-35 (193) | 36-55 (234) | 55+ (159) | LL & BB (236) | LL, BB & TV (200) |
| 3% | 8% | 14% | 8% | 9% | 8% | 6% | 7% | 7% |
| 7% | 8% | 11% | 12% | 12% | 10% | 6% | 6% | 13% |
| 13% | 16% | 19% | 9% | 18% | 13% | 10% | 13% | 14% |
| 17% | 17% | 17% | 10% | 16% | 16% | 12% | 13% | 15% |
| 60% | 49% | 35% | 58% | 41% | 53% | 64% | 57% | 48% |
| * | 2% | 5% | 3% | 5% | 1% | 3% | 4% | 2% |
| 3y 8m | 3y 3m | 2y 9m | 3y 6m | 2y 11m | 3y 4m | 3y 10m | 3y 6m | 3y 2m |

Over half (52%) of bundle owners in the survey have availed of the bundle for more than 3 years. The average length of tenure amongst those questioned is 3 years and 4 months.



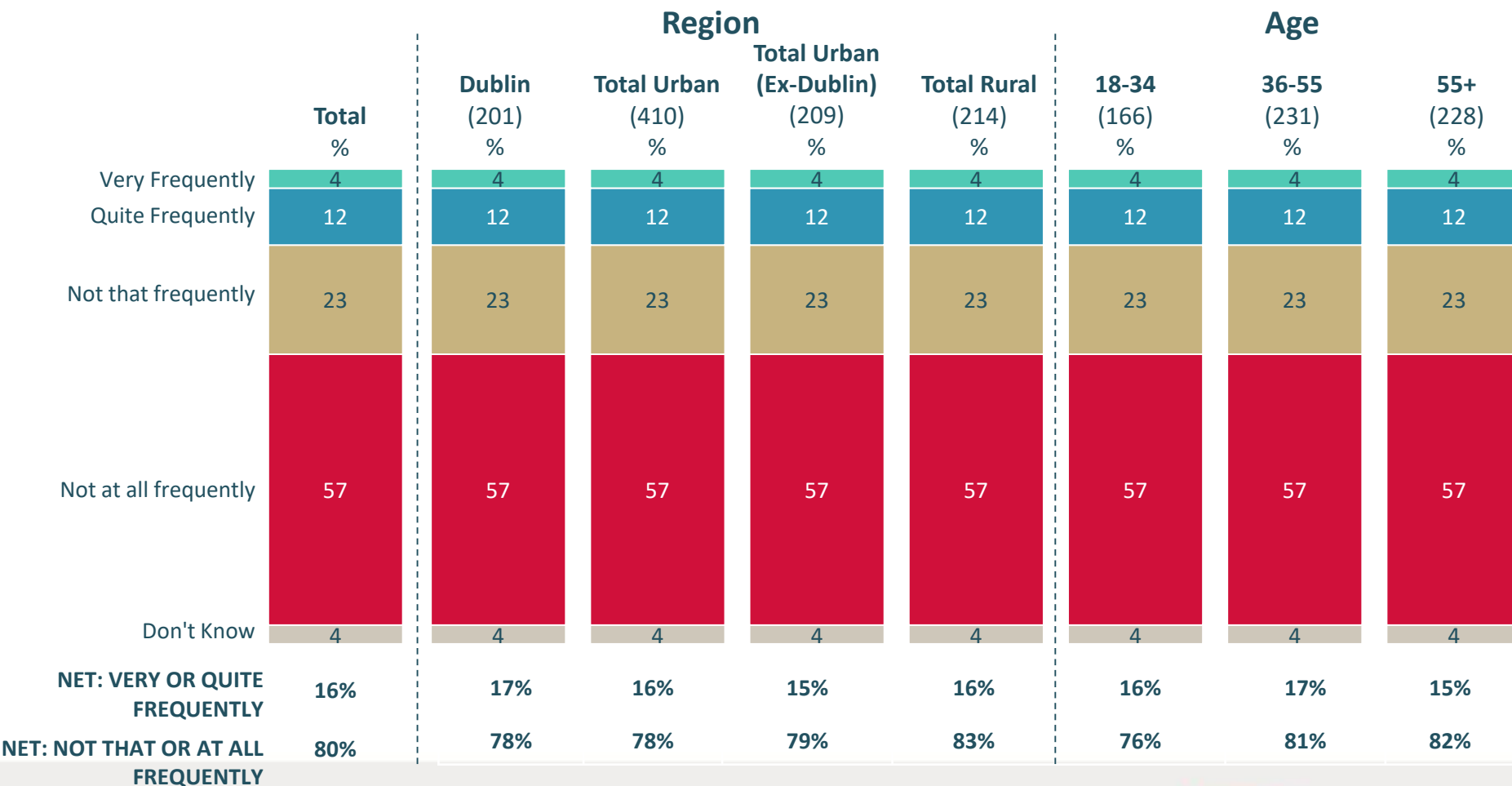


Cost Awareness

Consideration of Cost of Making a Call from Fixed Line Home Phone

(Base: All confirming they have fixed line - 625)

Q. How often, if at all, do you consider the cost of making a call from your fixed line home phone when calling another number?



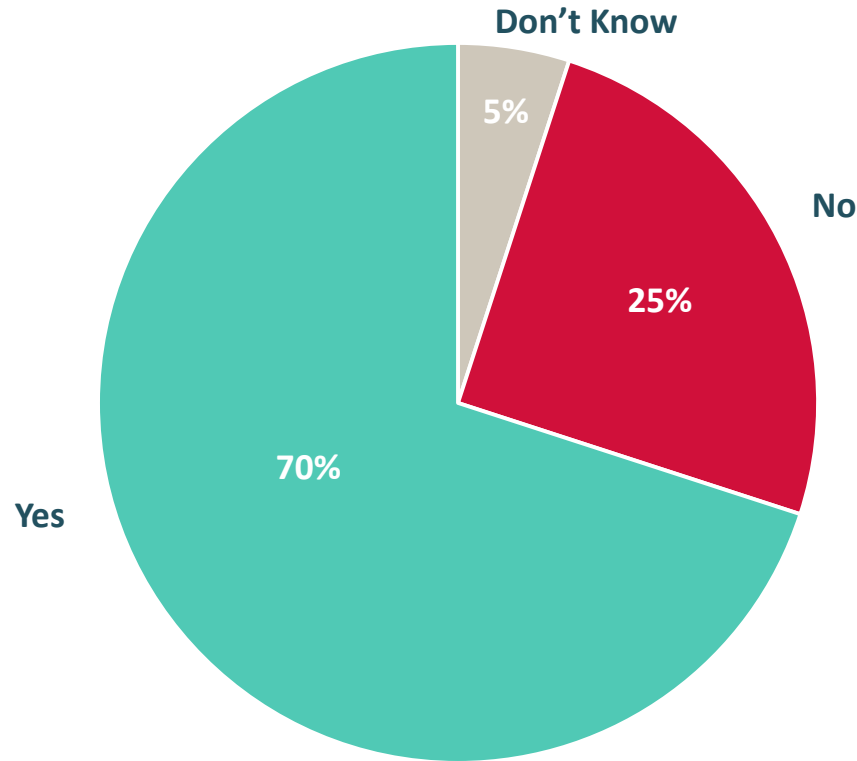
16% of fixed line users in the survey think quite or very frequently about the cost of making a call from their landline.



Has Cost of Call Prevented You Making a Call?

(Base: All who quite or very frequently consider the cost of making a call - 100)

Q. You mentioned that you frequently think about the cost of making calls from a fixed line phone, has this concern prevented you from using your fixed line in the past?

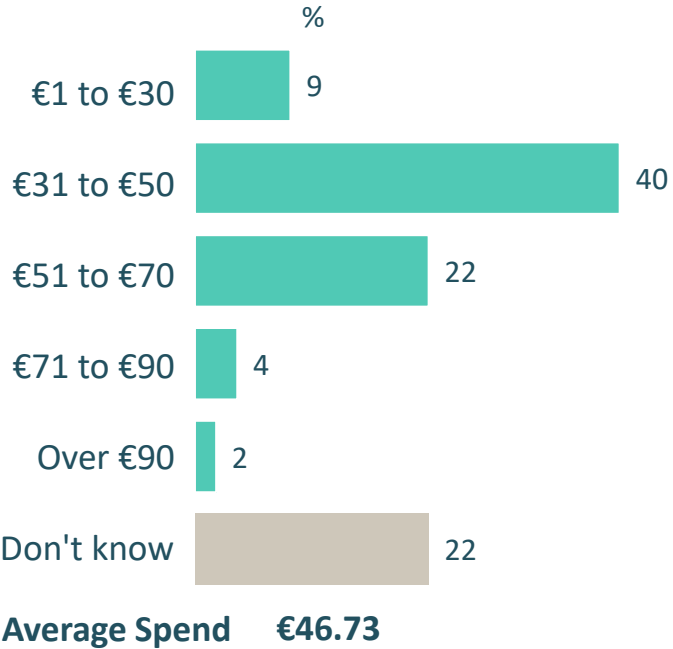


Amongst those in the survey that consider the cost of calls from a fixed line quite or very frequently, 70% say that this concern has prevented them from making a call in the past.

Spend Per Month for Fixed Line Telephone Service (Estimate includes Call Costs + Line Rental)

(Base: All adults using fixed line for voice (non-Bundle) - 132)

Q. Approximately how much do you pay per month in total for your fixed telephone service? Please include both the call costs and line rental in the total monthly cost of your fixed telephone service.



| Region | | | | Age | | |
|---------------|------------------|---------------------------------|------------------|---------------|---------------|---------------|
| Dublin (15*) | Total Urban (78) | Total Urban (Excl. Dublin) (64) | Total Rural (53) | 18-35 (27*) | 36-55 (36*) | 55+ (69) |
| 7% | 6% | 5% | 14% | 10% | 6% | 10% |
| 44% | 44% | 44% | 35% | 32% | 40% | 44% |
| 12% | 20% | 21% | 26% | 8% | 28% | 25% |
| 0 | 3% | 3% | 5% | 0 | 5% | 4% |
| 20% | 4% | 0 | 0 | 4% | 0 | 2% |
| 18% | 25% | 26% | 19% | 46% | 21% | 14% |
| €57.63 | €48.18 | €45.74 | €44.73 | €44.04 | €47.85 | €46.86 |

*Caution small base size

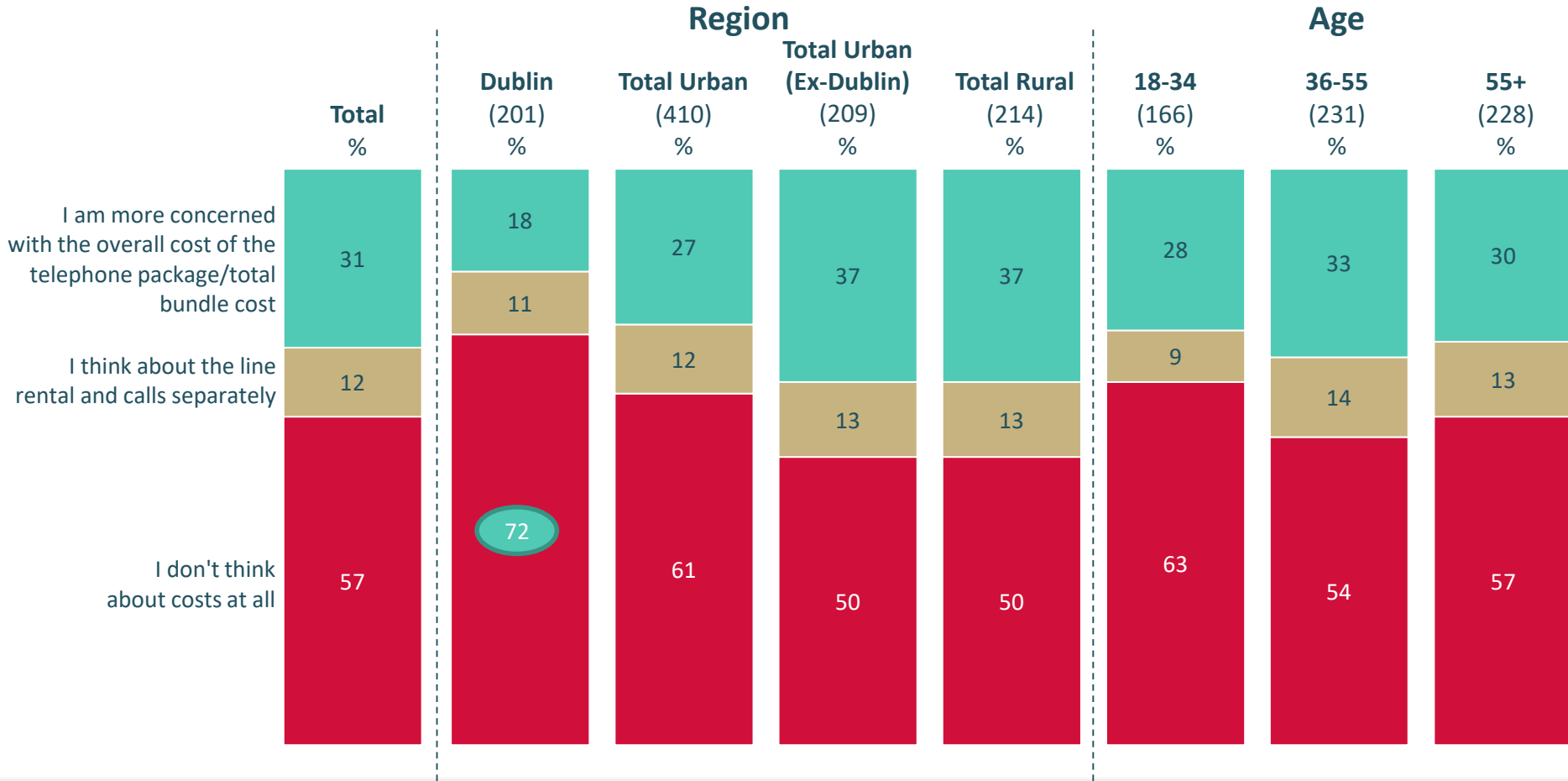
40% of non-bundled fixed line users that took the survey spend in the region of €31-€50 per month on their landline service.



Cost of Line Rental and Calls

(Base: All respondents using a fixed line who are aware of having a bundle or not - 616)

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



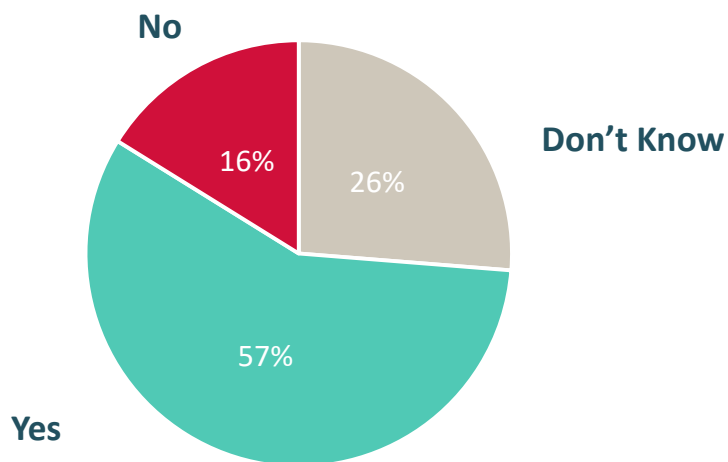
57% of respondents with a fixed line that know whether or not their landline is part of bundle do not consider the cost of line rental or calls at all. 31% are more concerned with the overall cost of the telephone package/bundle.



Does Fixed Line Provider Include Free or Reduced Call Costs As Part of Its Service?

(Base: All confirming they have fixed line - 625)

Q. Does your fixed line home phone supplier include free phone calls and/or reduced call costs as part of your service?



| | | Main Provider | | | |
|------------|--------------------|------------------------|----------|-----------|--------------------|
| | Bundle Users (485) | Vodafone at Home (113) | Sky (83) | eir (263) | Virgin Media (136) |
| Yes | 62% | 54% | 55% | 56% | 63% |
| No | 15% | 18% | 16% | 18% | 10% |
| Don't Know | 24% | 29% | 29% | 26% | 26% |

*Caution small base size

Free or reduced calls are included as part of fixed line service for 57% of landline owners that were surveyed.

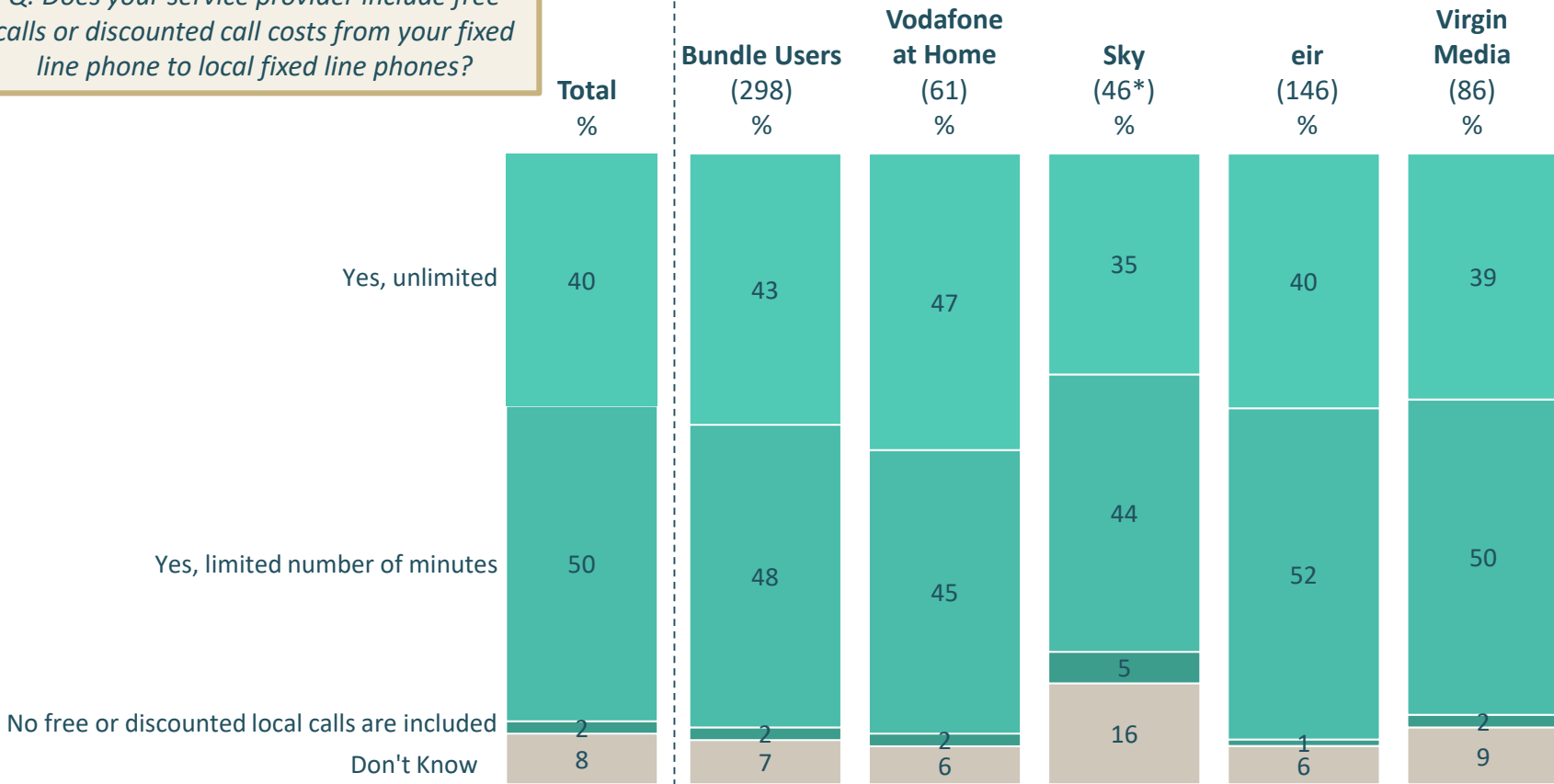


Does Fixed Line Provider Include Free or Discounted Calls from Fixed Line to Local Fixed Line Numbers?

(Base: All fixed line owners getting free or reduced calls - 358)

Main Provider

Q. Does your service provider include free calls or discounted call costs from your fixed line phone to local fixed line phones?



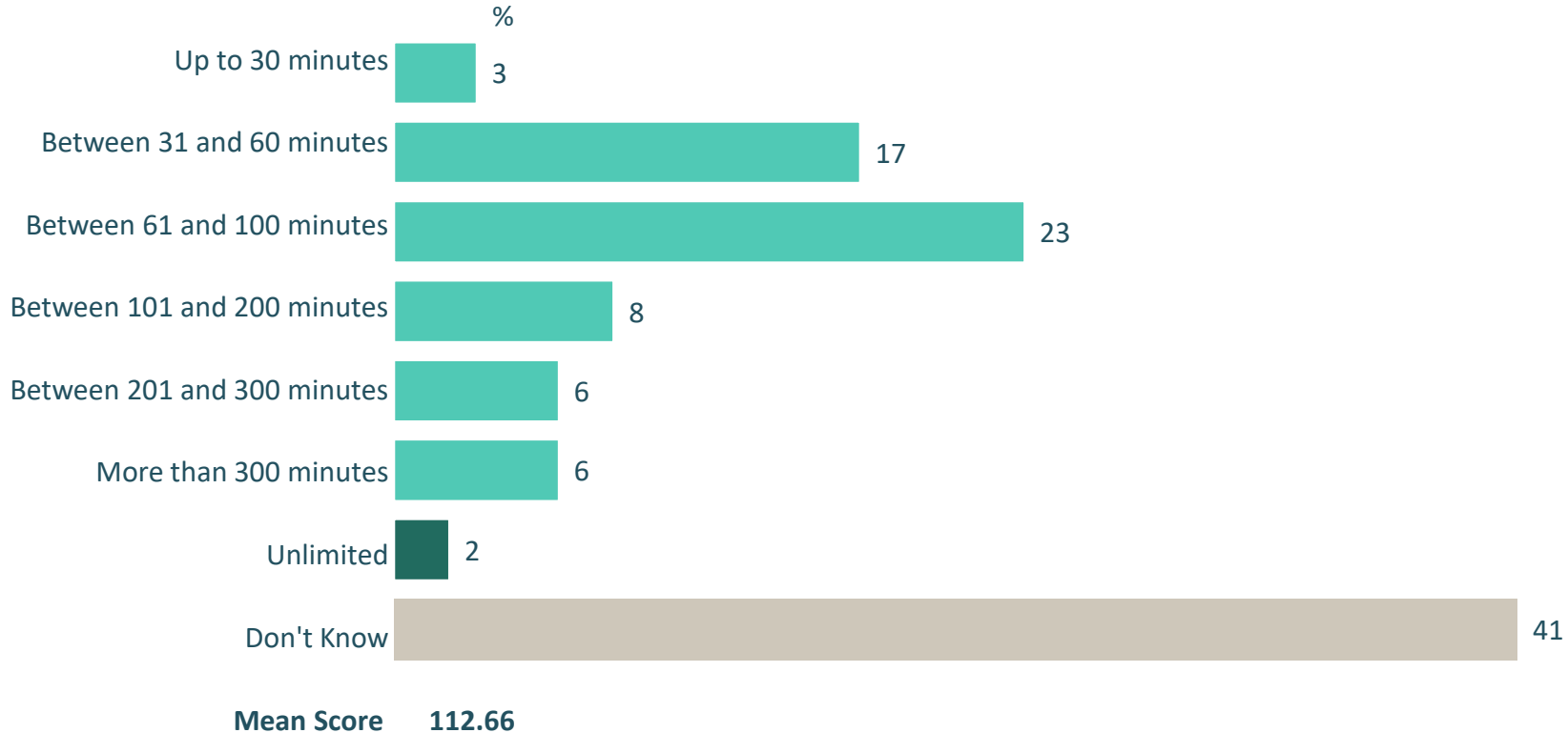
50% of respondents receiving free or reduced calls from their landline that are identified in the survey are given a limited number of minutes to use.



Amount of Minutes That Can be Used Within Discounted – Local Calls Package

(Base: All who receive a limited number of local minutes - 178)

Q. How many minutes per month can be used within your service to make calls from your fixed line phone to other local fixed phone numbers at no extra cost?



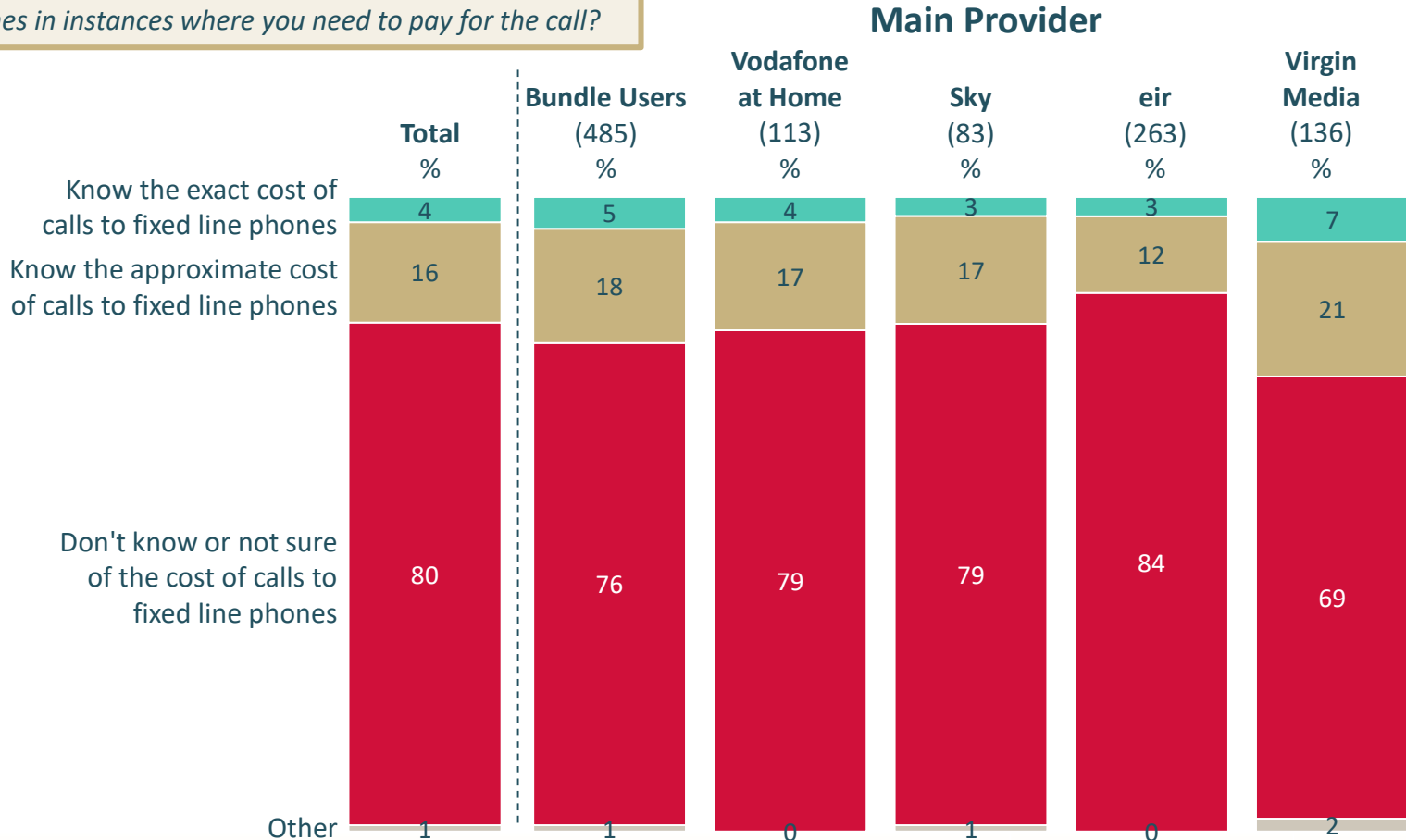
23% of those surveyed that receive a limited number of local minutes to use from their landline get between 61 and 100 minutes per month for local calls within a free or discounted package from service provider.



Awareness of the Cost of Making Calls – Local Calls

(Base: All confirming they have fixed line - 625)

Q. Could you state whether you know the cost of making calls from your fixed line phone to other local fixed line phones in instances where you need to pay for the call?



*Caution small base size

80% of fixed line owners in this survey are unaware of how much it costs to call a local landline from a landline.

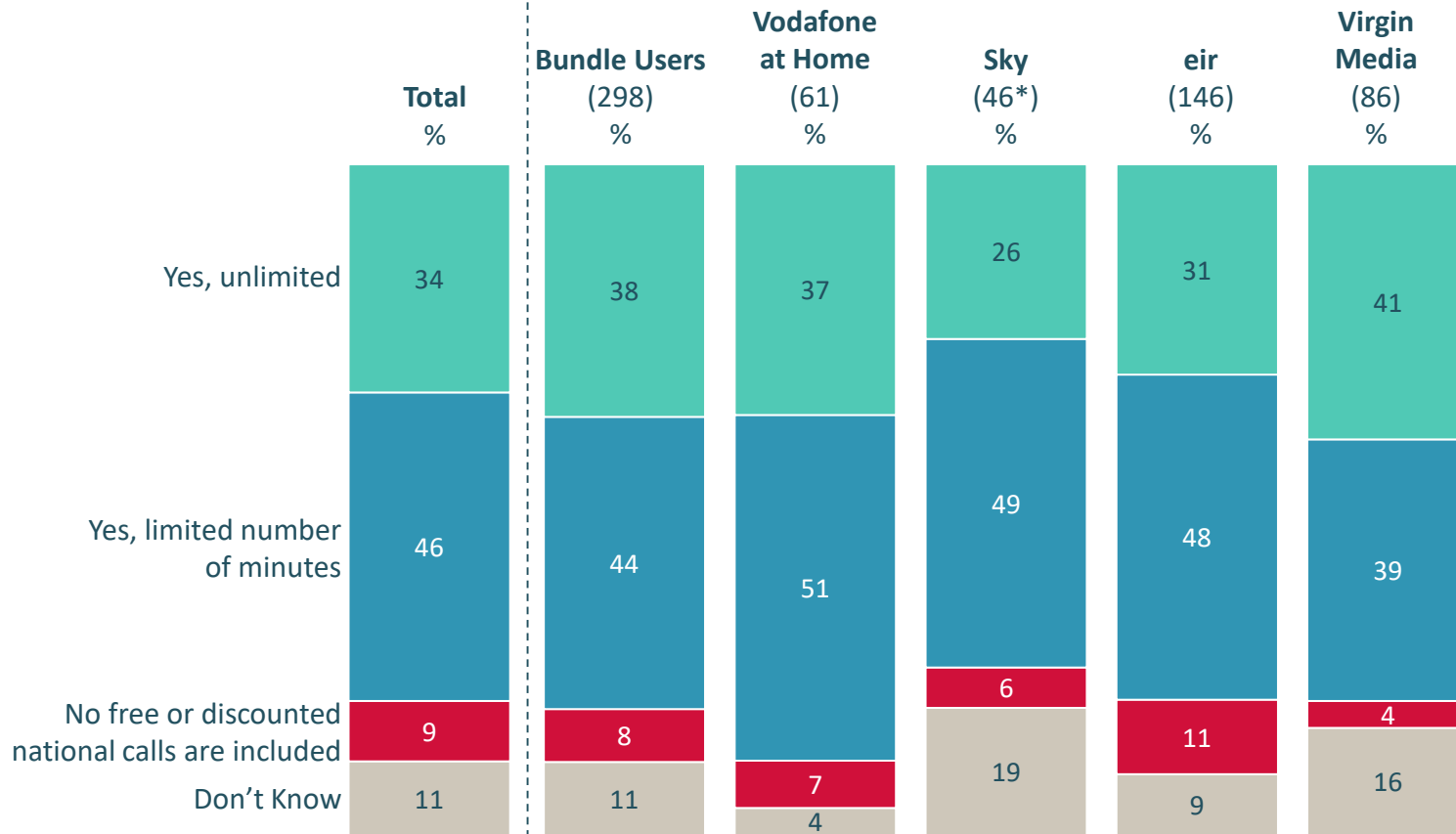


Types of Call Included – National Calls

(Base: All fixed line owners getting free or reduced calls - 358)

Q. Does your fixed line service include free call minutes or discounted call costs to national phone numbers?

Main Provider



*Caution small base size

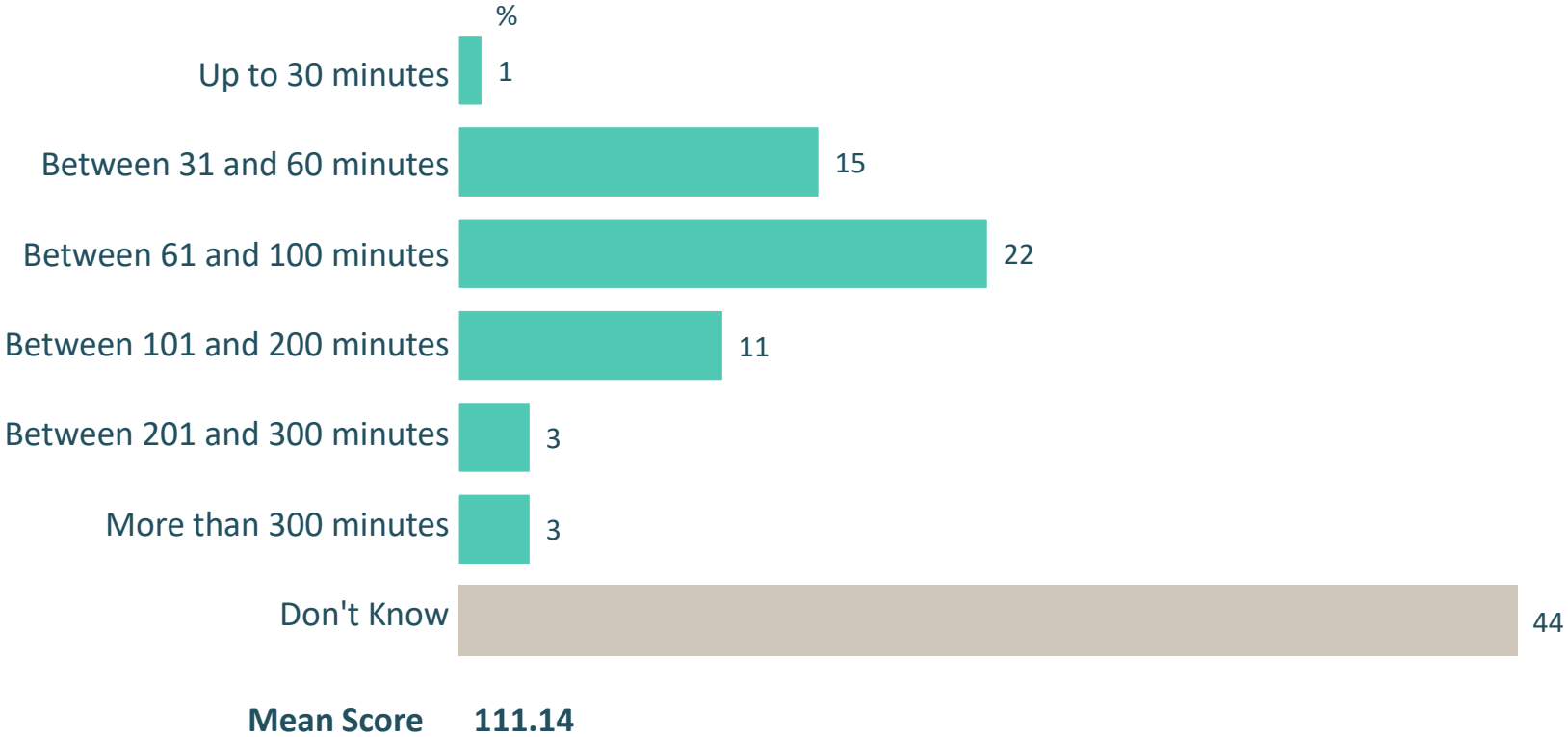
46% of respondents receiving free or reduced calls from their landline receive a limited number of minutes for calling national phone numbers, with an additional 34% having an unlimited amount for these types of calls.



Amount of Minutes That Can be Used – National Calls

(Base: All who receive a limited number of national minutes - 166)

Q. How many minutes per month can be used within your service to make calls from your fixed line phone to other national fixed phone numbers at no extra cost?



22% of survey respondents that receive a limited number of national minutes to call from their landline receive 61-100 minutes per month for national calls, however, 44% are unaware of how many minutes they get.

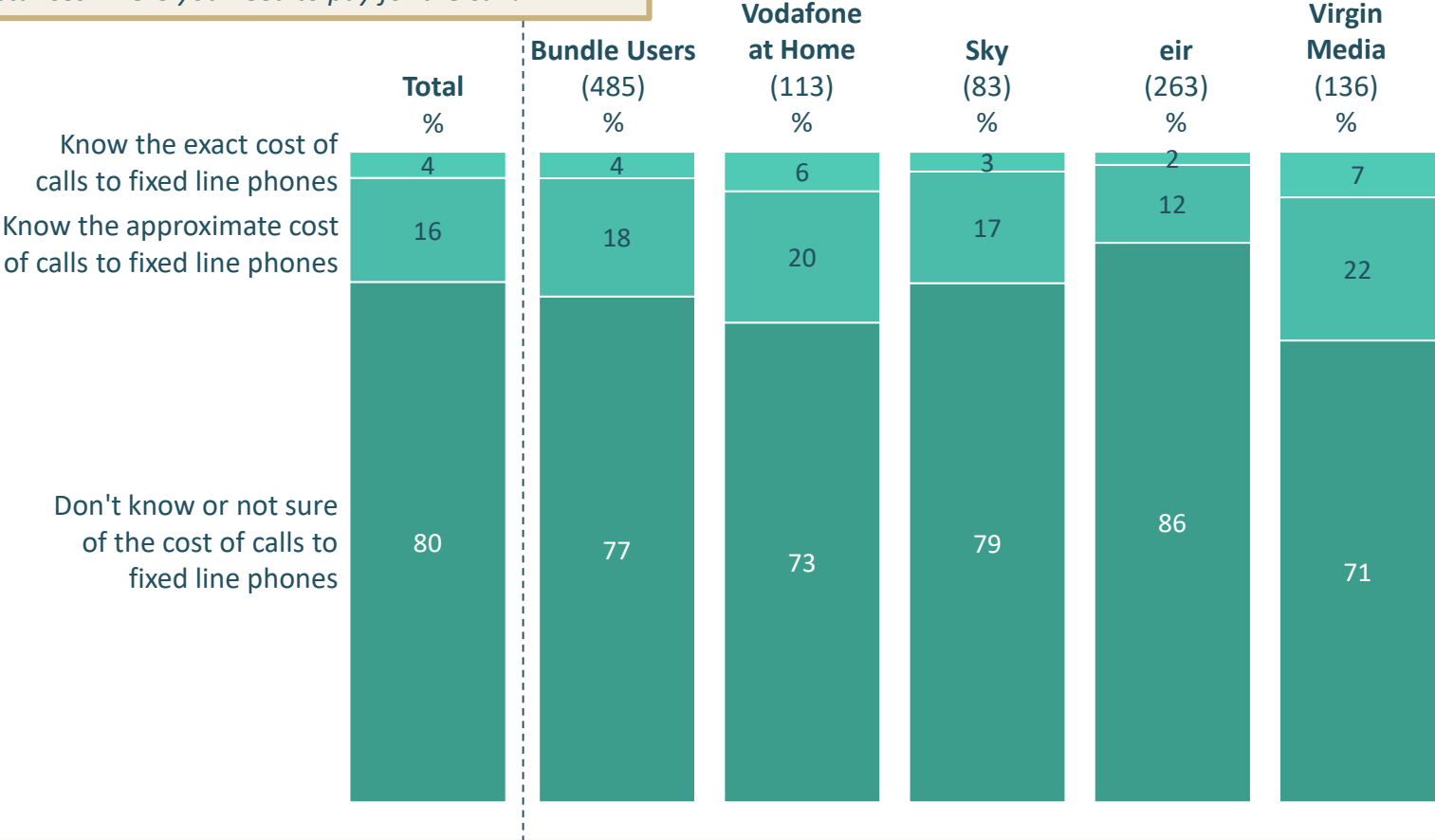


Awareness of the Cost of Making Calls – National Calls

(Base: All confirming they have fixed line - 625)

Q. Could you state whether you know the cost of making calls from your fixed line phone to national fixed line phones in instances where you need to pay for the call?

Main Provider



80% of fixed line owners in this survey are not aware of the cost of national calls.

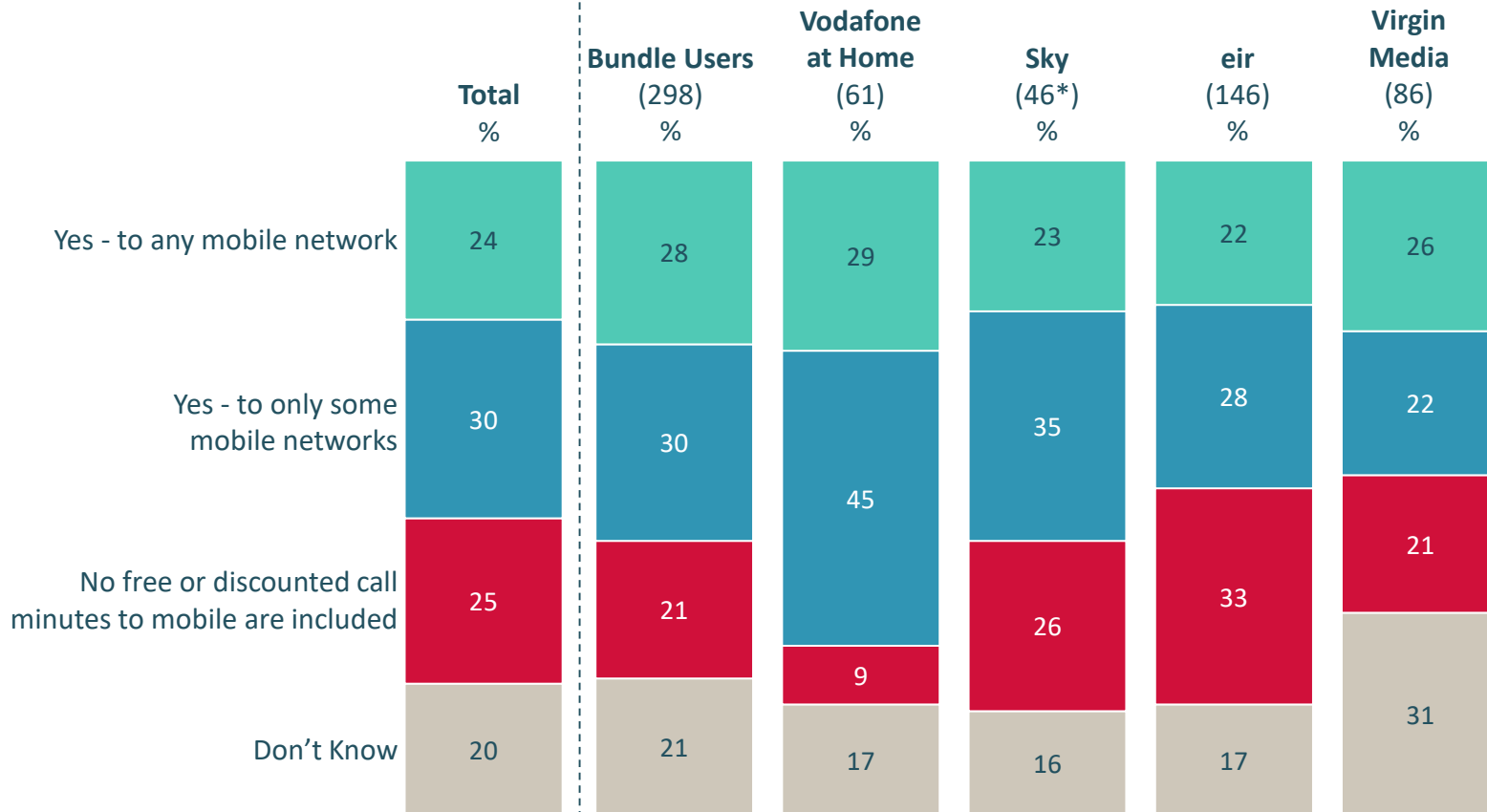


Does Your Fixed Line Service Include Free Calls to Mobiles

(Base: All fixed line owners getting free or reduced calls - 358)

Q. Does your fixed line service include free call minutes or discounted call costs to mobile phone numbers?

Main Provider



*Caution small base size

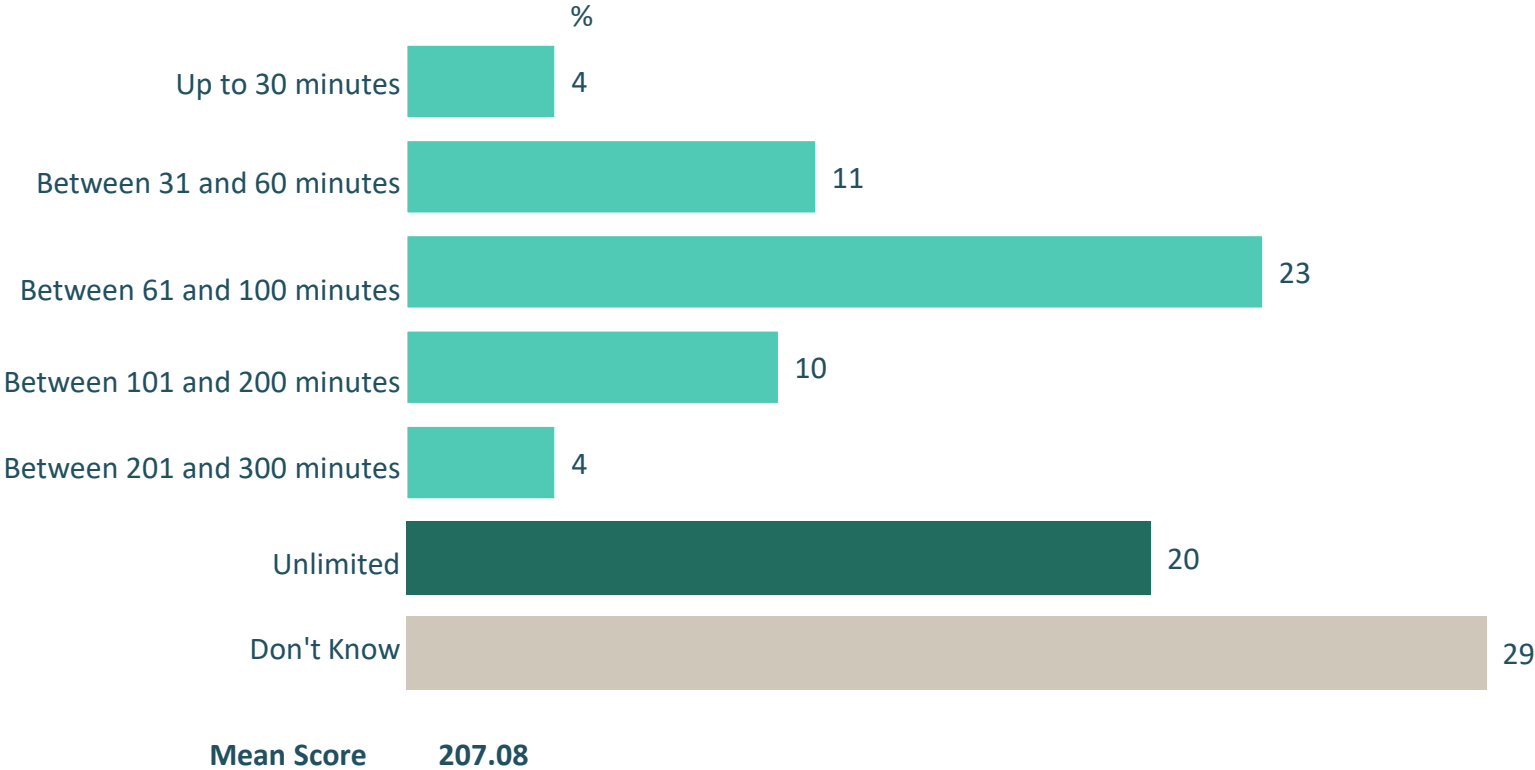
Within this survey, 25% of fixed line owners receiving free or reduced calls are unable to use inclusive or discounted minutes for calling mobile numbers as no discounts to mobiles are included.



Amount of Minutes That Can be Used – Mobile Calls - I

(Base: All using fixed line and receiving free or discounted calls to mobiles - 195)

Q. How many minutes per month can be used within your fixed line service to make calls to mobiles in Ireland at no extra cost?



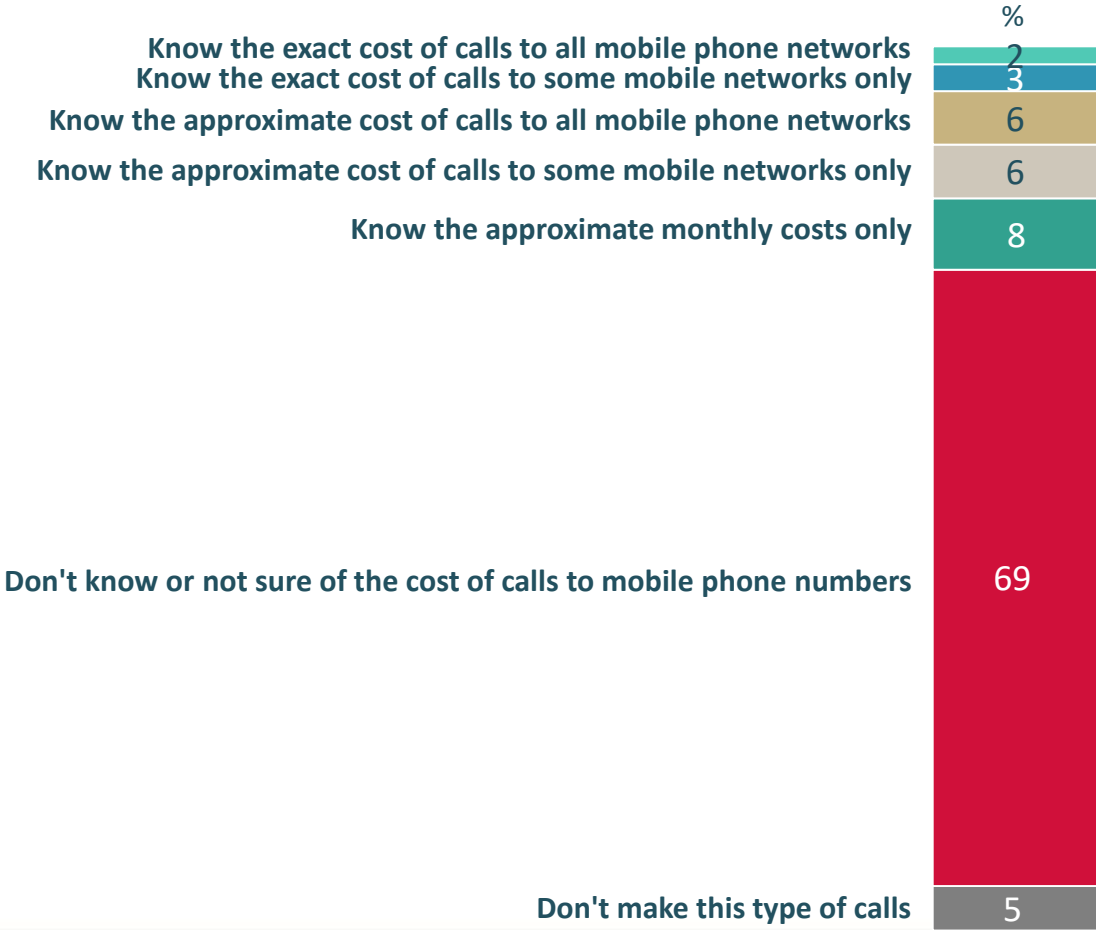
23% of those surveyed that have inclusive mobile calls from their landline receive between 61 and 100 minutes per month, while 20% receive an unlimited amount of minutes.



Awareness of Cost of Making Individual Calls to Mobiles - I

(Base: All confirming they have fixed line - 625)

Q. Could you state whether you know the cost of making individual calls from your fixed line phone to mobile phones (outside of any free minutes included in the service you have)?



69% of fixed line owners surveyed, don't know or are not sure of the cost of calls to mobile phone numbers from their landline.



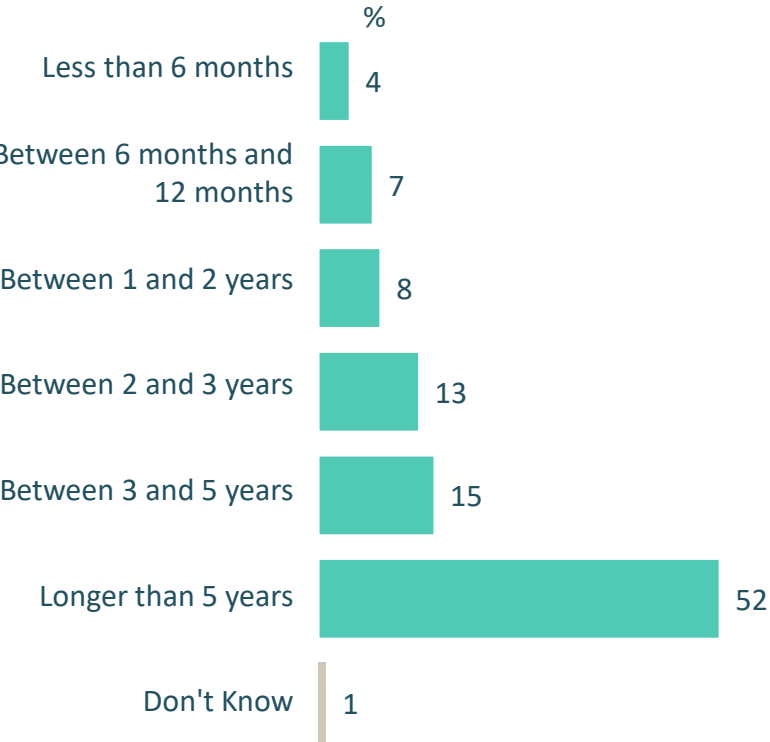


Switching

Length of Time with Fixed Line Service Provider - I

(Base: All confirming they have fixed line - 625)

Q. How long do you have your home fixed line service with your provider?



Average Length of Tenure 5 years & 4 months

| Region | | | | Age | | |
|--------------|-------------------|----------------------------------|-------------------|-------------|-------------|-----------|
| Dublin (201) | Total Urban (410) | Total Urban (Excl. Dublin) (209) | Total Rural (214) | 18-35 (166) | 36-55 (231) | 55+ (228) |
| 4% | 4% | 5% | 6% | 5% | 5% | 2% |
| 7% | 6% | 6% | 7% | 13% | 5% | 3% |
| 10% | 9% | 9% | 7% | 12% | 9% | 5% |
| 13% | 15% | 17% | 9% | 19% | 15% | 6% |
| 24% | 17% | 10% | 11% | 20% | 17% | 9% |
| 43% | 48% | 53% | 59% | 29% | 48% | 73% |
| * | 1% | 1% | 2% | 3% | * | 1% |

4 years & 11 months 5 years & 1 month 5 years & 4 months 5 years & 8 months 3 years & 11 month 5 years & 1 month 6 years & 6 months

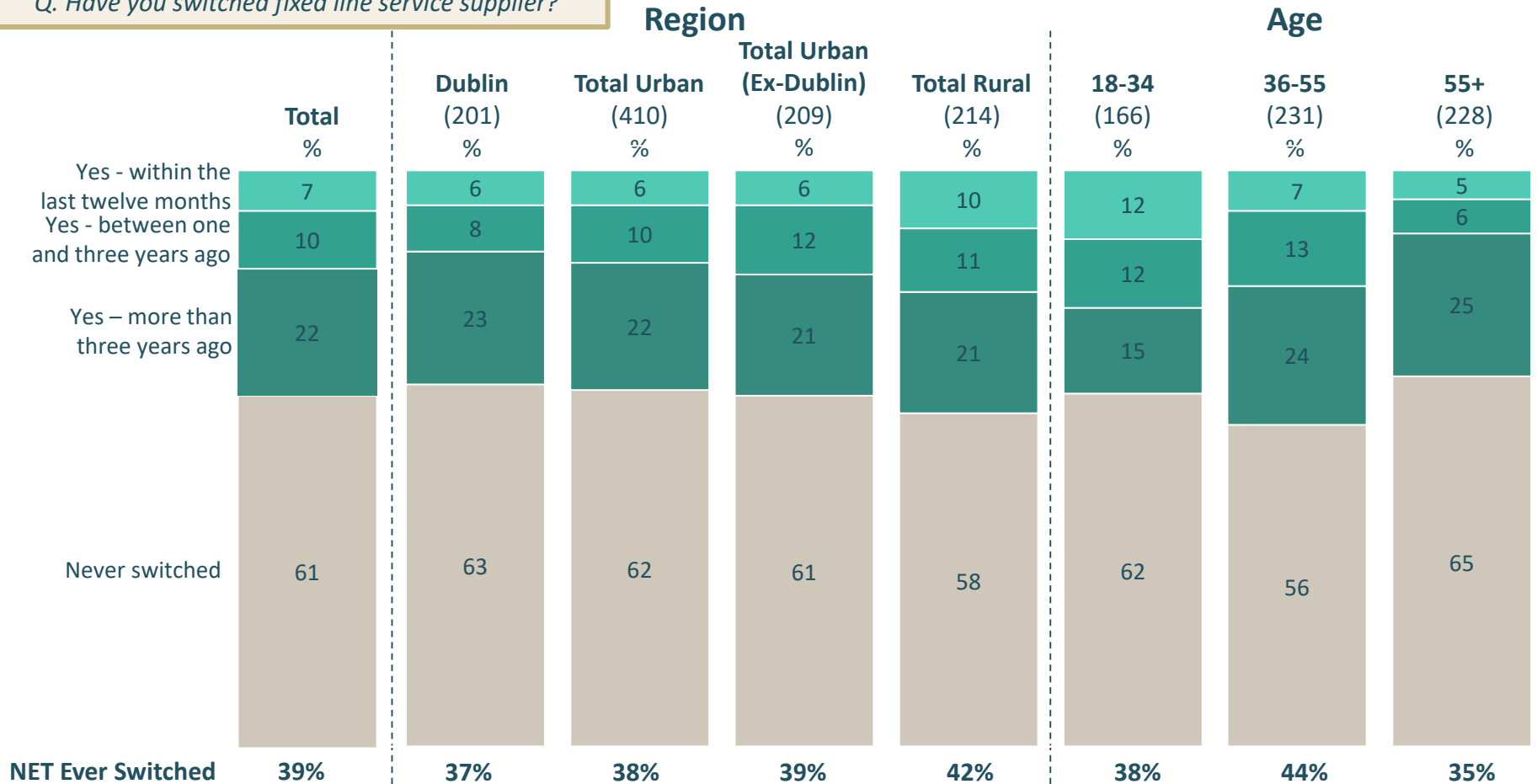
52% of landline owners in this survey have had their fixed line service for more than 5 years, with the average length of tenure 5 years and 4 months.



Incidence of Switched Fixed Line Service

(Base: All confirming they have fixed line - 625)

Q. Have you switched fixed line service supplier?

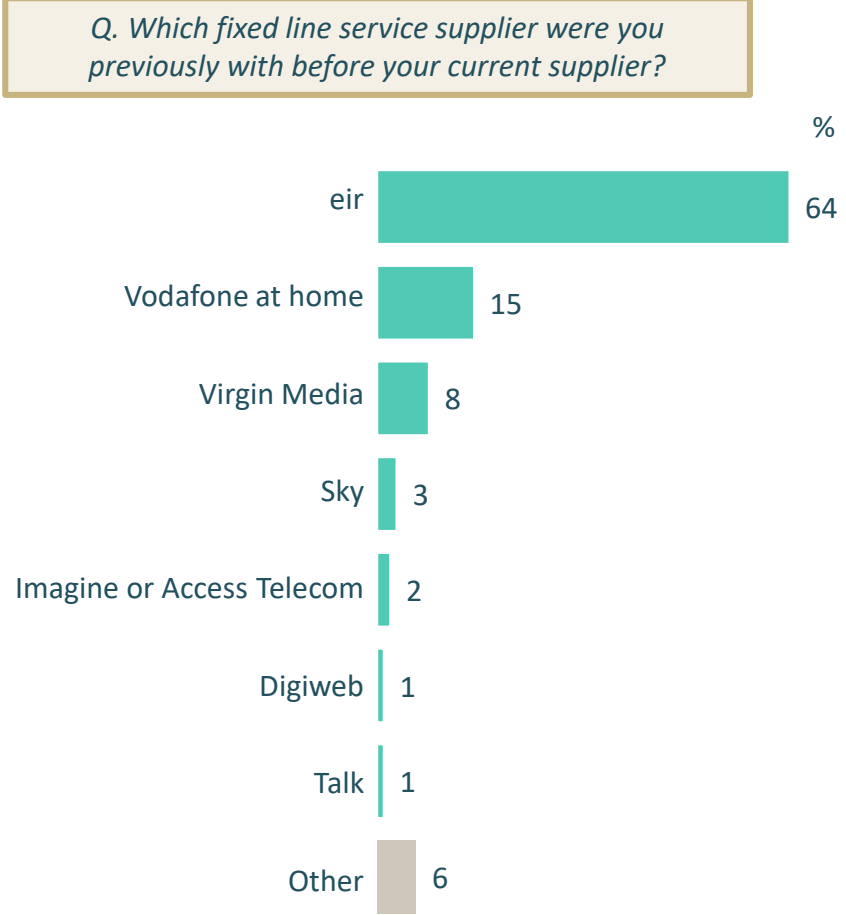


61% of landline owners that took part in this survey have never switched their fixed line service provider.



Previous Fixed Line Service Provider

(Base: All who ever switched fixed line service - 246)



| CURRENT FIXED LINE PROVIDER | | | |
|-----------------------------|-----------------------|-------------------|----------|
| eir (52) | Vodafone at home (64) | Virgin Media (58) | Sky (53) |
| N/A | 83% | 79% | 74% |
| 44% | N/A | 7% | 13% |
| 14% | 1% | N/A | 9% |
| 11% | 0 | 2% | N/A |
| 0 | 5% | 0 | 4% |
| 4% | 0 | 0 | 0 |
| 2% | 2% | 0 | 0 |
| 15% | 6% | 5% | 0 |

Amongst respondents that have switched their fixed line provider in the past, 64% were previously a customer of eir.



Which of Following Actions Were Conducted A Time of Switch...

(Base: All who switched fixed line service in past 12 months – 46*)

Q. Thinking back to the time when you switched your fixed line service provider in the past 12 months which if any of the following did you do at that time?



*Caution small base size

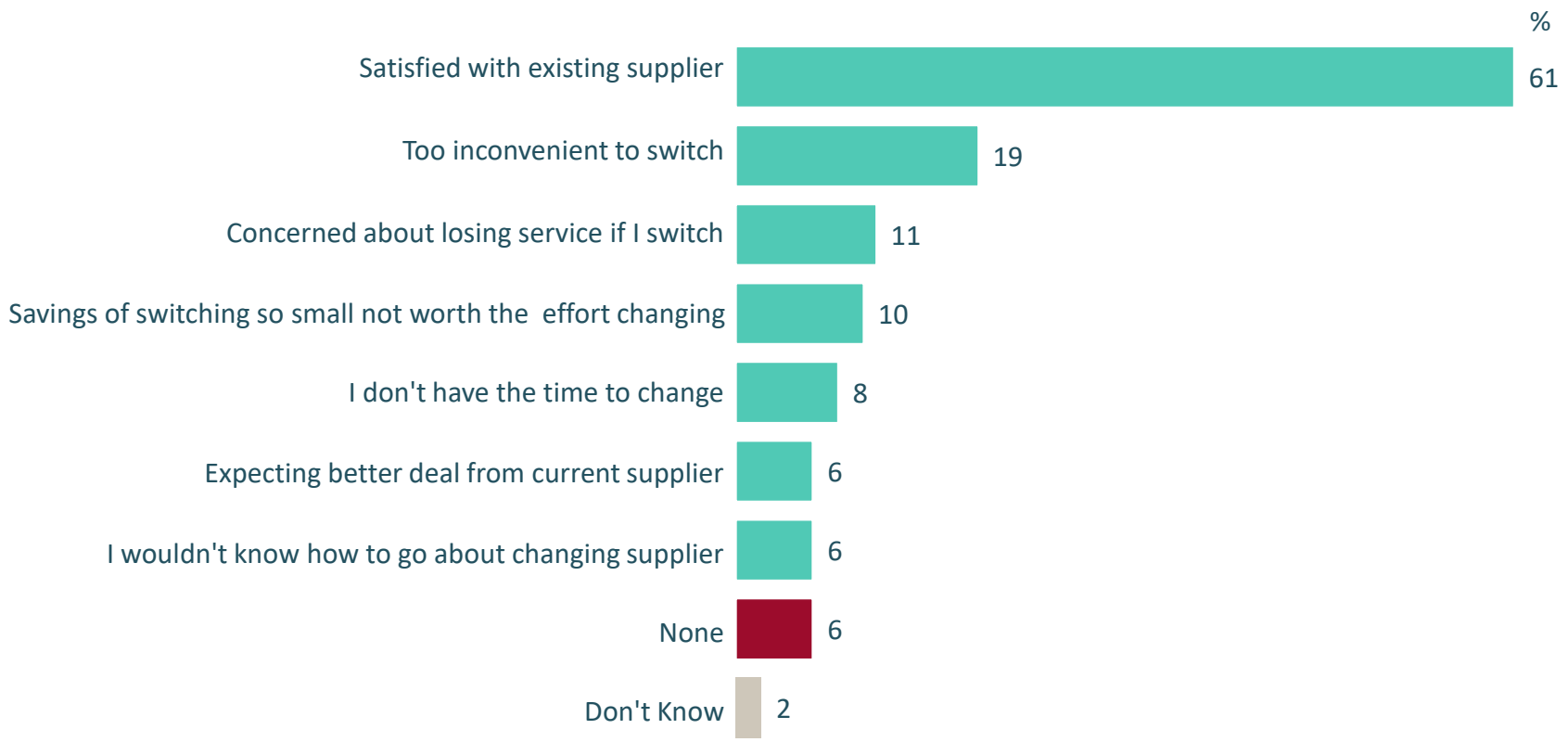
38% of those surveyed that switched their fixed line service provider in the past year have spoken with friends/family for recommendations.



Reasons For Not Switching Fixed Line Phone Supplier

(Base: All who have fixed line and have not switched fixed supplier – 379)

Q. You mentioned that you have not switched fixed line phone supplier, why is this?



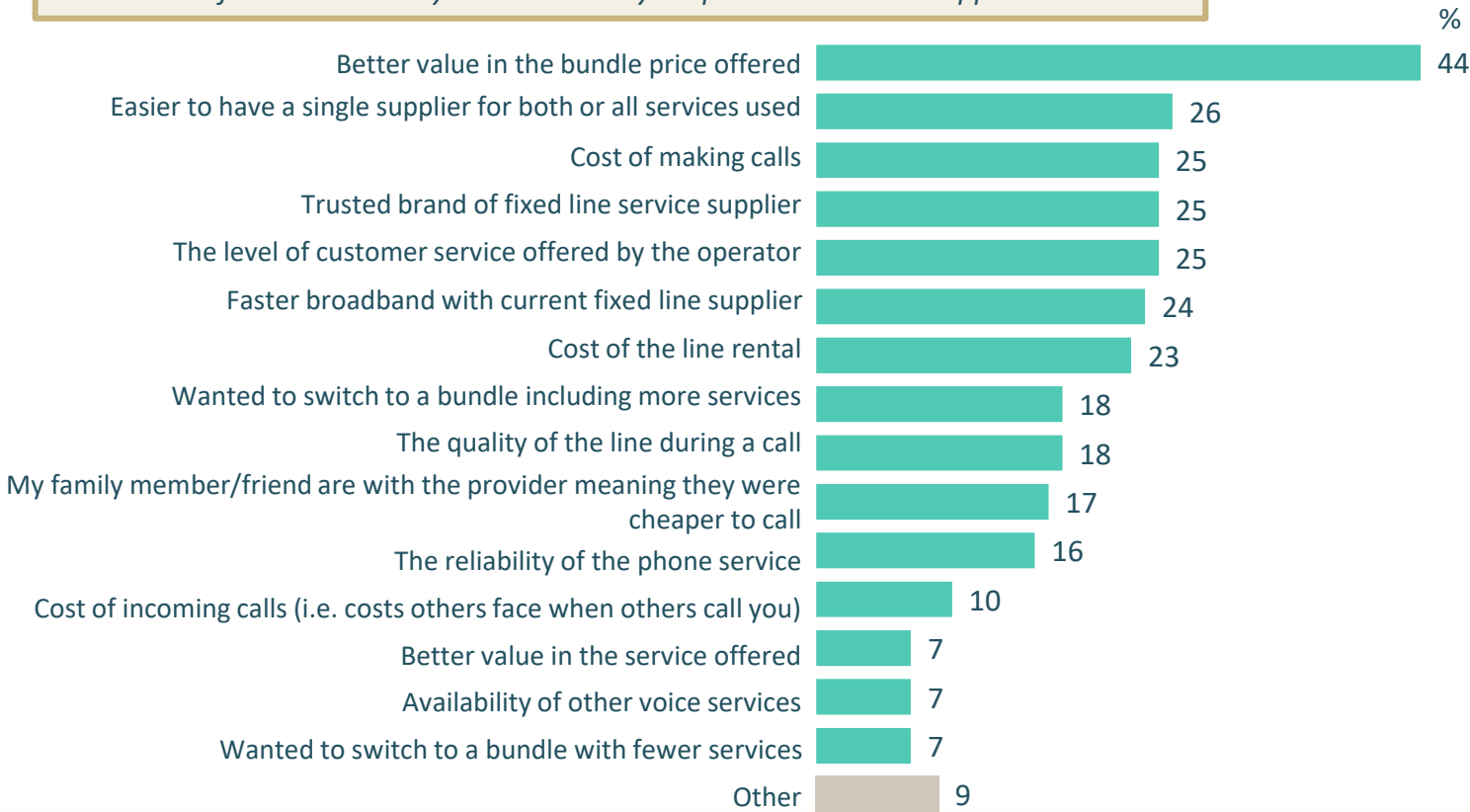
61% of landline owners in survey that never switched are happy with their current provider. 19% feel that switching would cause them too much inconvenience.



Importance Of Factors When Choosing a Fixed Line Provider

(Base: All adults using fixed line and with current supplier past 3 years – 202)

Q. Thinking about when you chose your current fixed line phone service supplier, please select the top three reasons out of the following set of possible reasons which were most important to your decision to choose your fixed line phone service supplier. Note that all of the reasons may be relevant to your particular service supplier.



| CURRENT FIXED LINE PROVIDER | |
|-----------------------------|--------------------|
| Vodafone at home (55) | Virgin Media (49*) |
| 49% | 37% |
| 24% | 19% |
| 35% | 20% |
| 16% | 30% |
| 24% | 28% |
| 33% | 28% |
| 22% | 19% |
| 20% | 18% |
| 15% | 24% |
| 11% | 25% |
| 17% | 21% |
| 11% | 11% |
| 9% | 2% |
| 4% | 9% |
| 3% | 6% |
| 6% | 3% |

%

*Caution: Small base size

NOTE: Other Providers not shown due to small base sizes

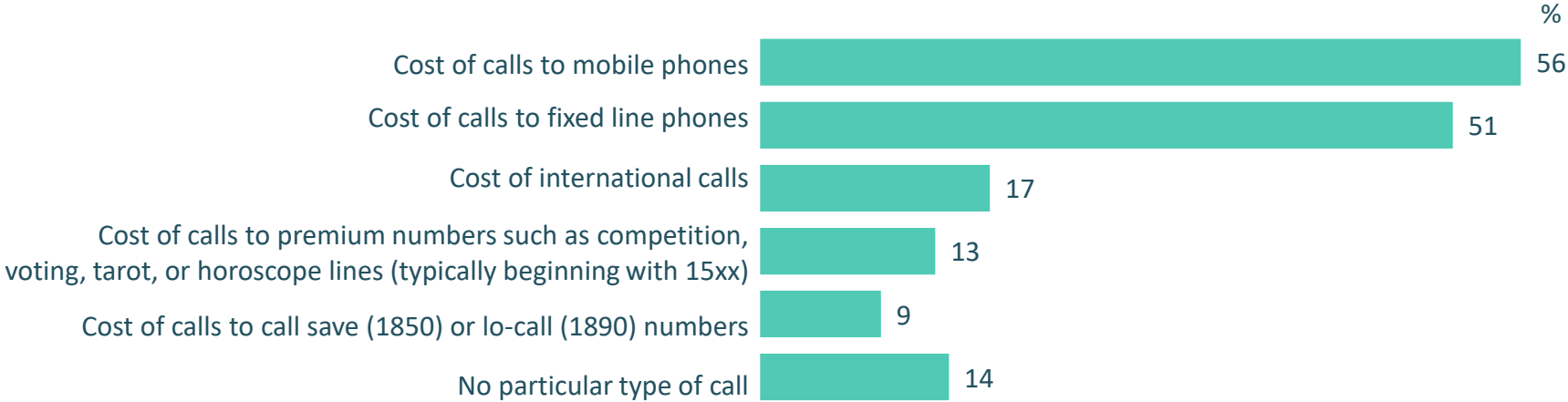
Amongst fixed line owners that have been with their current supplier for 3+ years and took part in this survey, 44% say that the value of bundles was in the top three reasons for choosing their service supplier.



Cost of Calls When Choosing Fixed Line Supplier – What Call Type is most important?

(Base: All who mention cost when deciding on fixed line supplier – 64*)

Q. You mentioned that the cost of calls was an important reason for choosing your current fixed line supplier. Please select the type of call which was of particular importance from the following list.



*Caution small base size

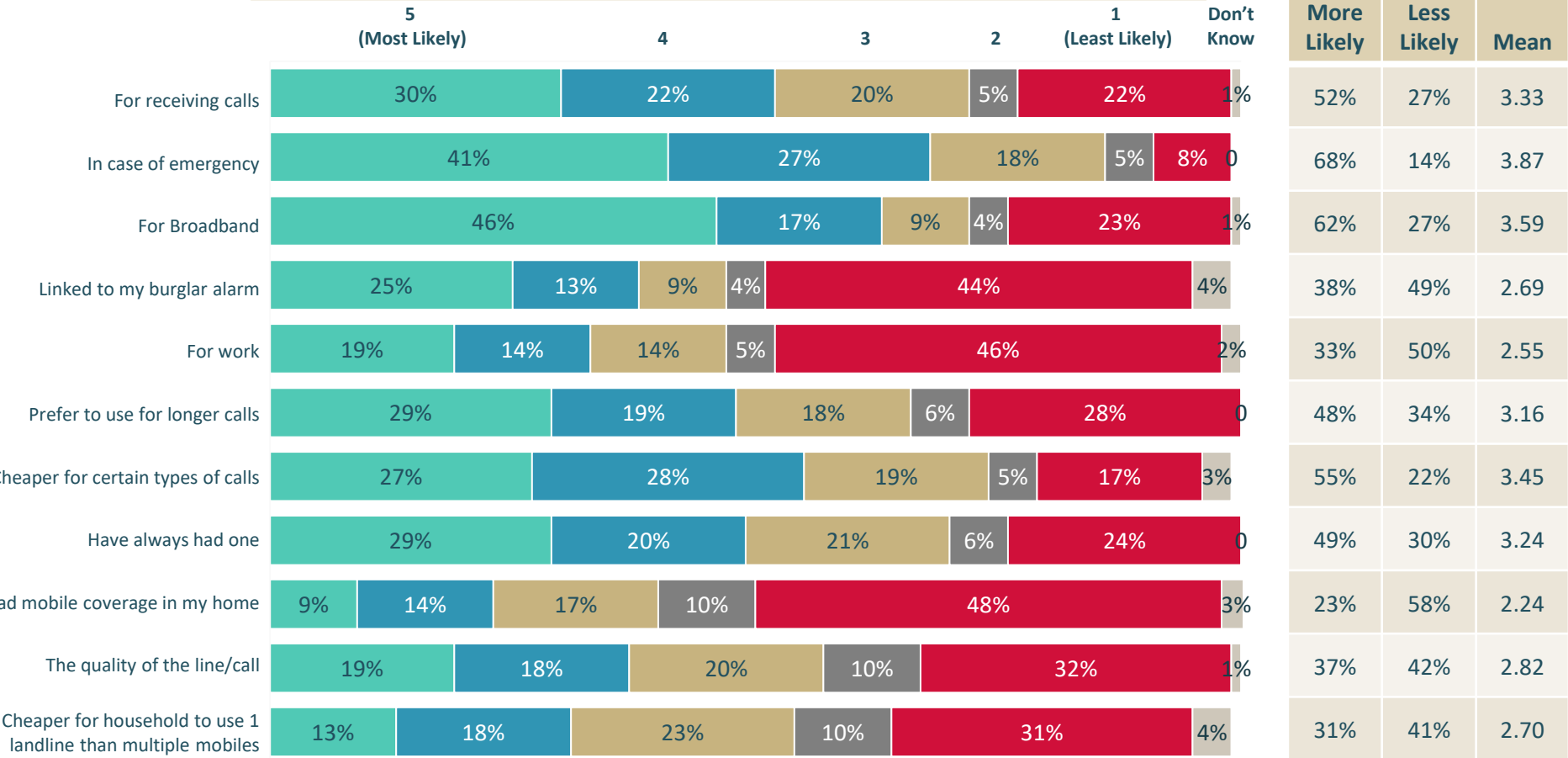
Of those that mentioned cost being an important factor when choosing their fixed line service supplier, 56% say that the cost of calls to mobile phones was of particular importance in this decision.



Reasons for Keeping a Fixed Line in Your Home

(Base: All confirming they have fixed line - 625)

Q. Thinking of the following reasons why you may still have a fixed line phone in your home, please rate the following potential reasons for keeping your fixed line phone.



52% of respondents in the survey that own a fixed line say that it is likely that they have kept their landline service for receiving calls, while 62% say that they have likely kept their fixed line in order to have broadband.



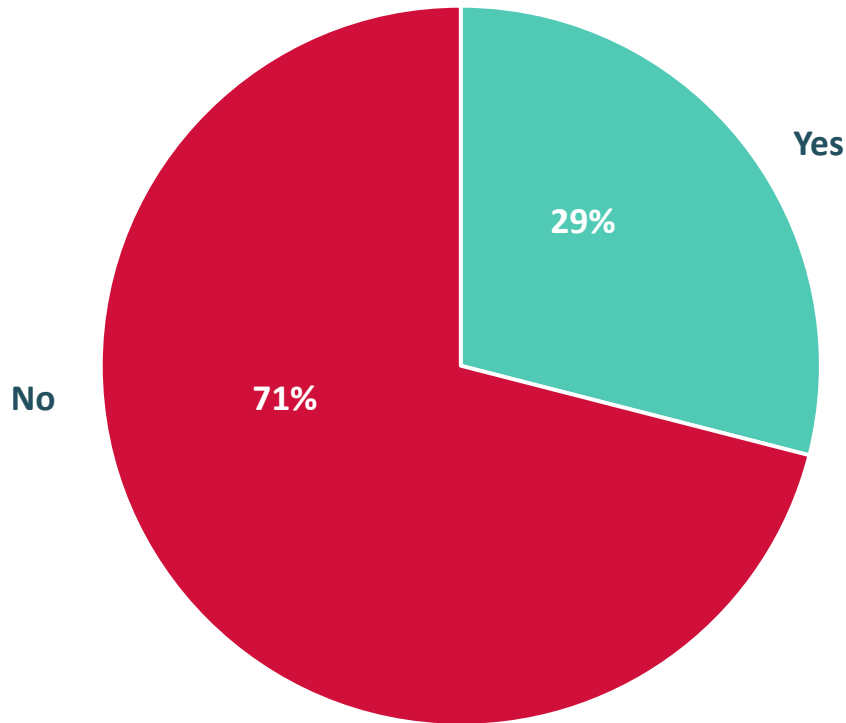


Non-Fixed Line Homes

Previous Landline Ownership In Current Home?

(Base: All who do not have fixed line - 389)

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



| | Age | | |
|-----|----------------|----------------|--------------|
| | 18-35 (197) | 36-55 (145) | 55+ (47*) |
| Yes | 15% | 38% | 61% |
| No | 15% | 62% | 39% |

*Caution small base size

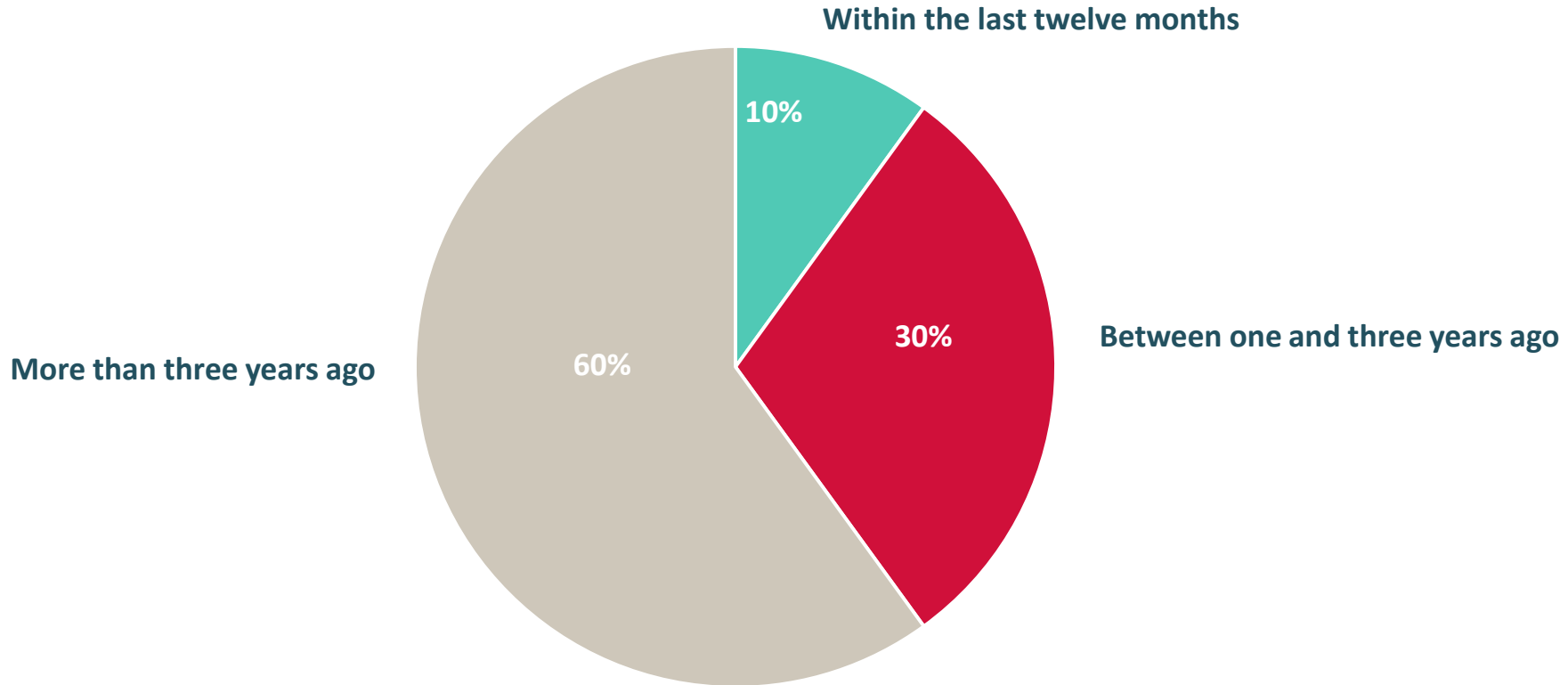
Focussing on those surveyed that do not have a landline, 29% of these people have owned a landline previously.



Length of Time Fixed Line Was Cancelled

(Base: All who previously had fixed line - 113)

Q. How long ago did you stop having a fixed line phone in your home?



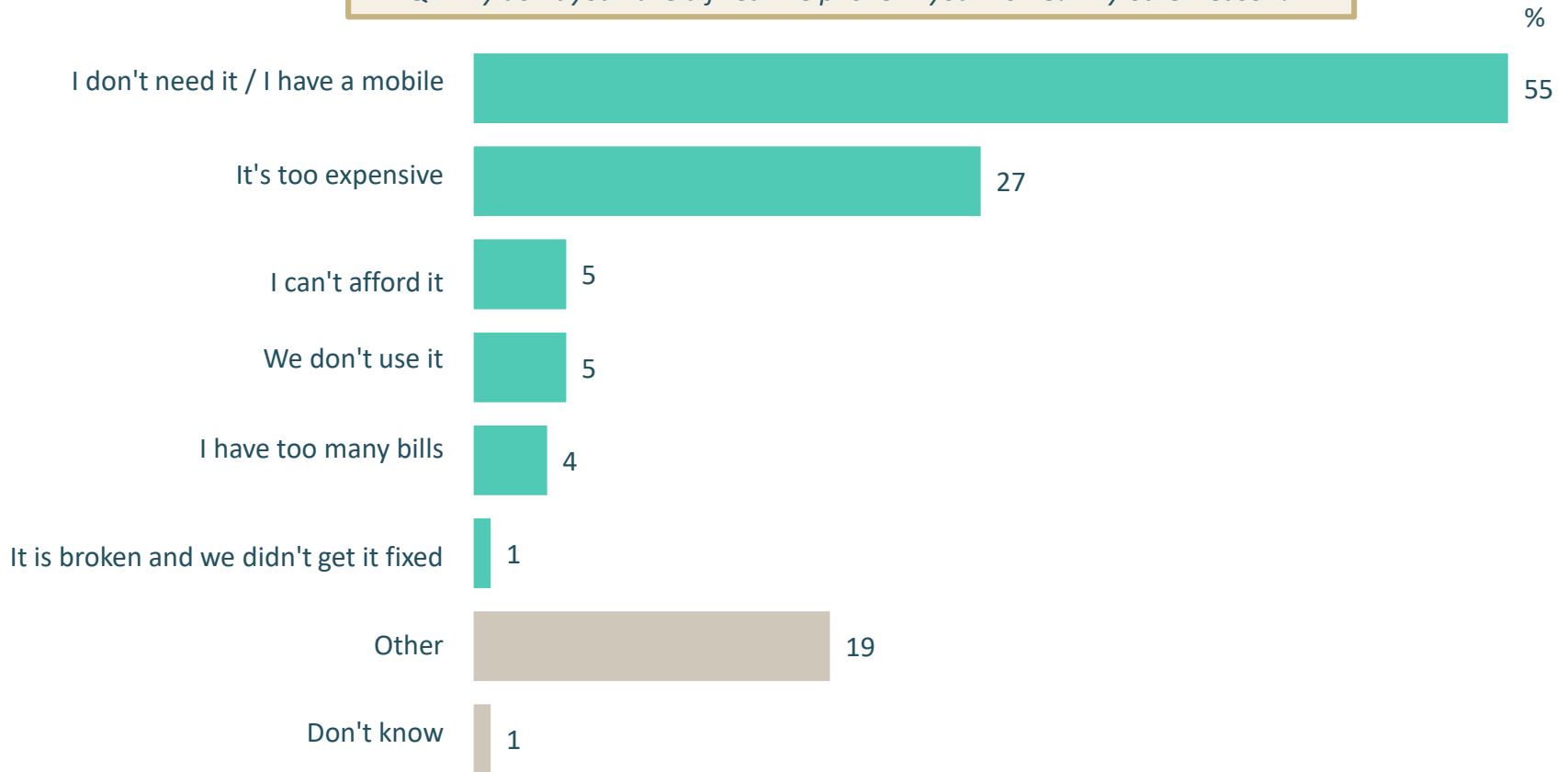
60% of respondents that previously had a fixed line but no longer have one, say that it has been over 3 years since they owned their landline.



Reasons For Not Having a Fixed Line Phone At Home?

(Base: All who do not have fixed line – 389)

Q. Why don't you have a fixed line phone in your home? Any other reason?



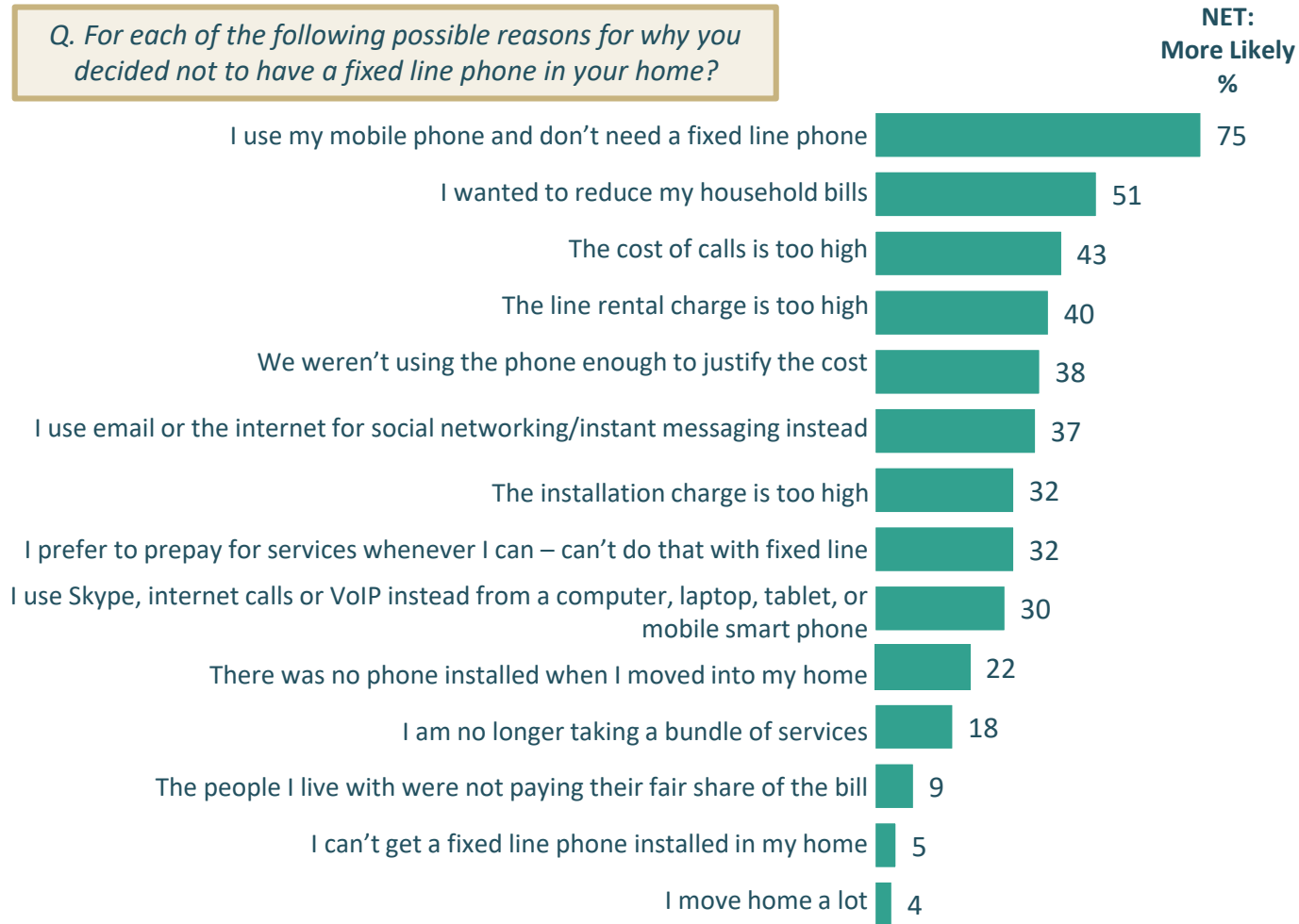
Amongst those surveyed that do not have a fixed line, lack of necessity is given as a reason for non-fixed line ownership by 55% – more than half feel that their mobile is sufficient for their needs.



Ranking of Reasons For Not Having a Fixed Line

(Base: All who do not have a fixed line - 389)

Q. For each of the following possible reasons for why you decided not to have a fixed line phone in your home?



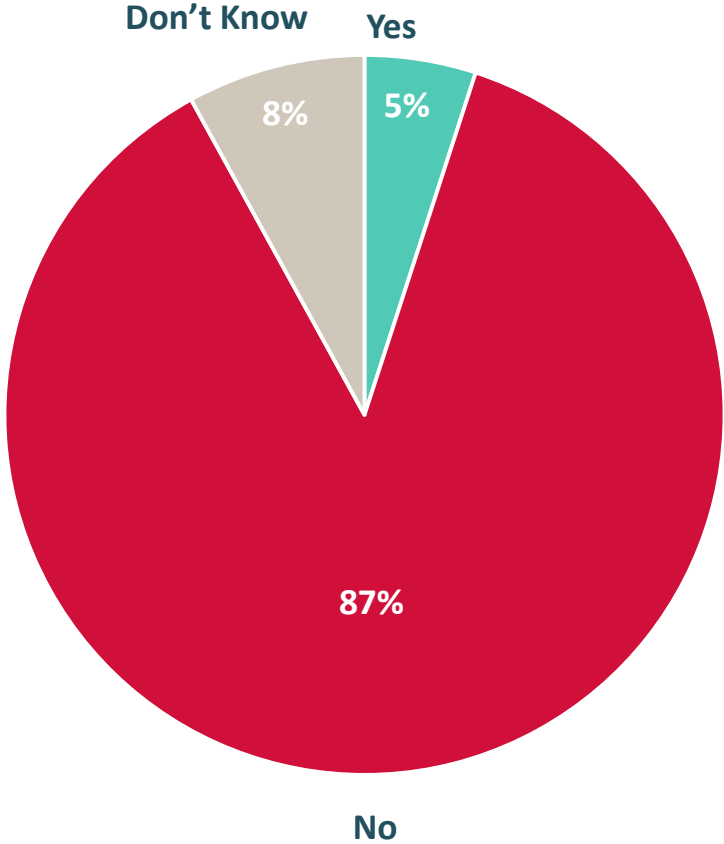
75% of those surveyed that do not have a landline believe that they do not need a fixed line due to owning a mobile phone.



Consideration of Getting Fixed Line in the Next 3 Years

(Base: All who do not have fixed line - 389)

Q. Would you consider getting a fixed line in the next three years?



| | Age | | |
|------------|----------------|----------------|--------------|
| | 18-35 (197) | 36-55 (145) | 55+ (47*) |
| Yes | 7% | 4% | 0 |
| No | 82% | 90% | 96% |
| Don't Know | 11% | 6% | 4% |

*Caution small base size

Only 5% of survey respondents without a landline would consider getting a fixed line within the next 3 years.





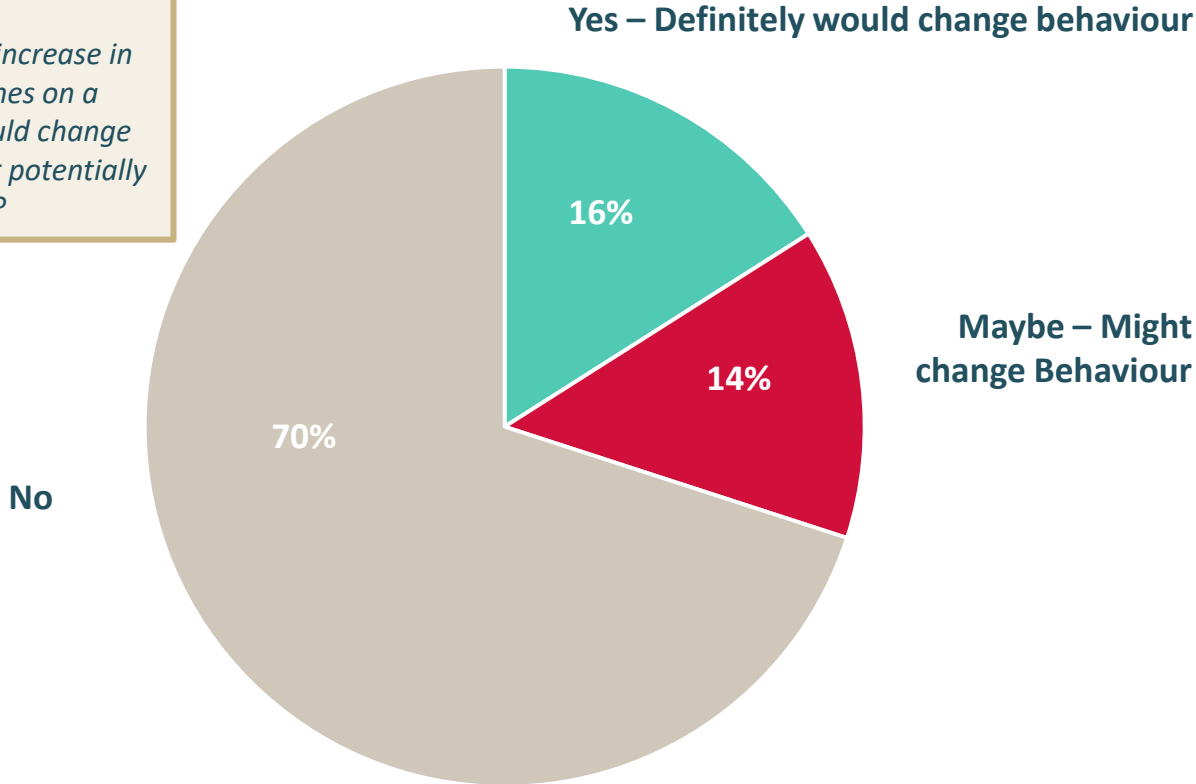
SSNIP (Non Bundle)

If landline calls to landlines on another network increased by 1 cent per minute...

(Base: All using fixed line and not with a bundle - 132)

Imagine if the cost of a phone call from your landline to other landlines on a different network/different landline provider to you increased by 1 cent per minute.

Q. As a consequence of this 1 cent per minute increase in the cost of calls from your landline to landlines on a different network, do you believe that you would change your behaviour (including cancelling your bill or potentially switching to an alternative supplier)?



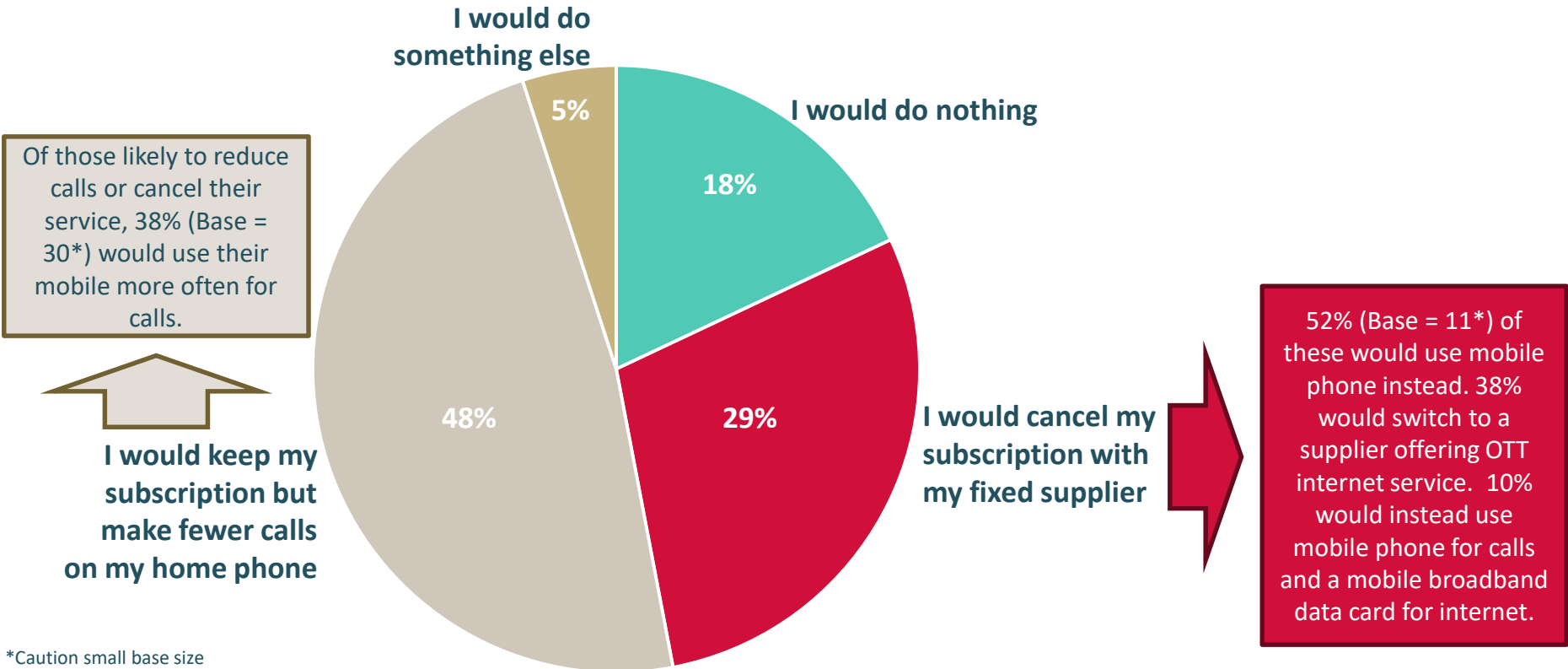
70% of users of a non-bundled fixed line service that were surveyed say that they would not change their behaviour due to a 1 cent per minute price increase on calls from landline to landlines on another network, 14% say they might and 16% say they definitely would change behaviour.



Likely Action if Landline to Landline (on another network) Prices Increased by 1 Cent p/m (Definitely or Maybe Change Behaviour)

(Base: All who might or would change behaviour as a result of 1c p/m increase on landline to landline on a different network calls – 39*)

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



*Caution small base size

Amongst respondents that said they might or definitely would change behaviour as a result of a 1 cent p/m increase on calls from their landline to a landline on another network, 48% say that they would keep their subscription but make fewer landline calls. However, 29% say they would cancel their landline subscription. Please note that this is off a small base size.



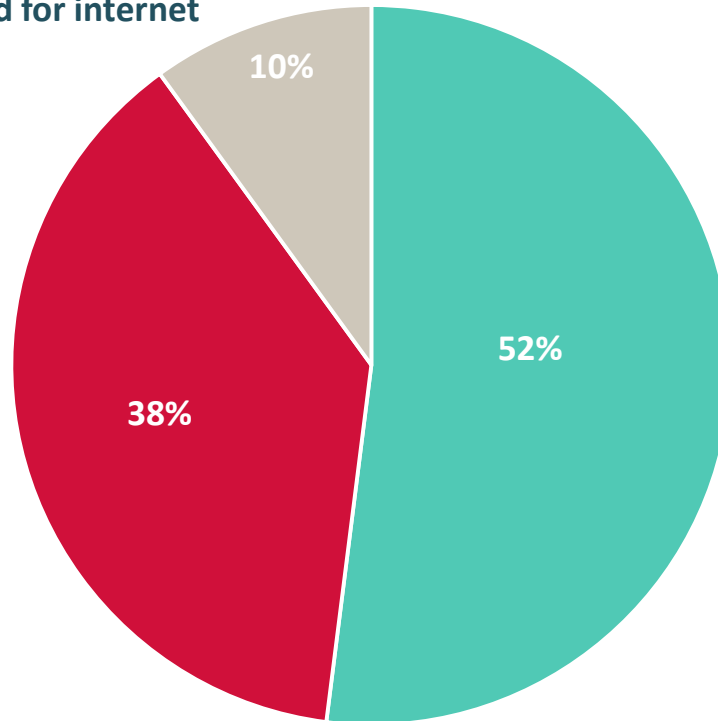
What Action Would be Taken If Cancelled Service

(Base: All likely to cancel service – 11*)

Q. You have just said that you would cancel your subscription, what would you do instead?

Give up my fixed line connection and instead use my mobile phone for calls and a mobile broadband data card for internet

Cancel and switch to a supplier offering OTT internet service



I would cancel my fixed line connection and use my mobile phone instead

*Caution small base size

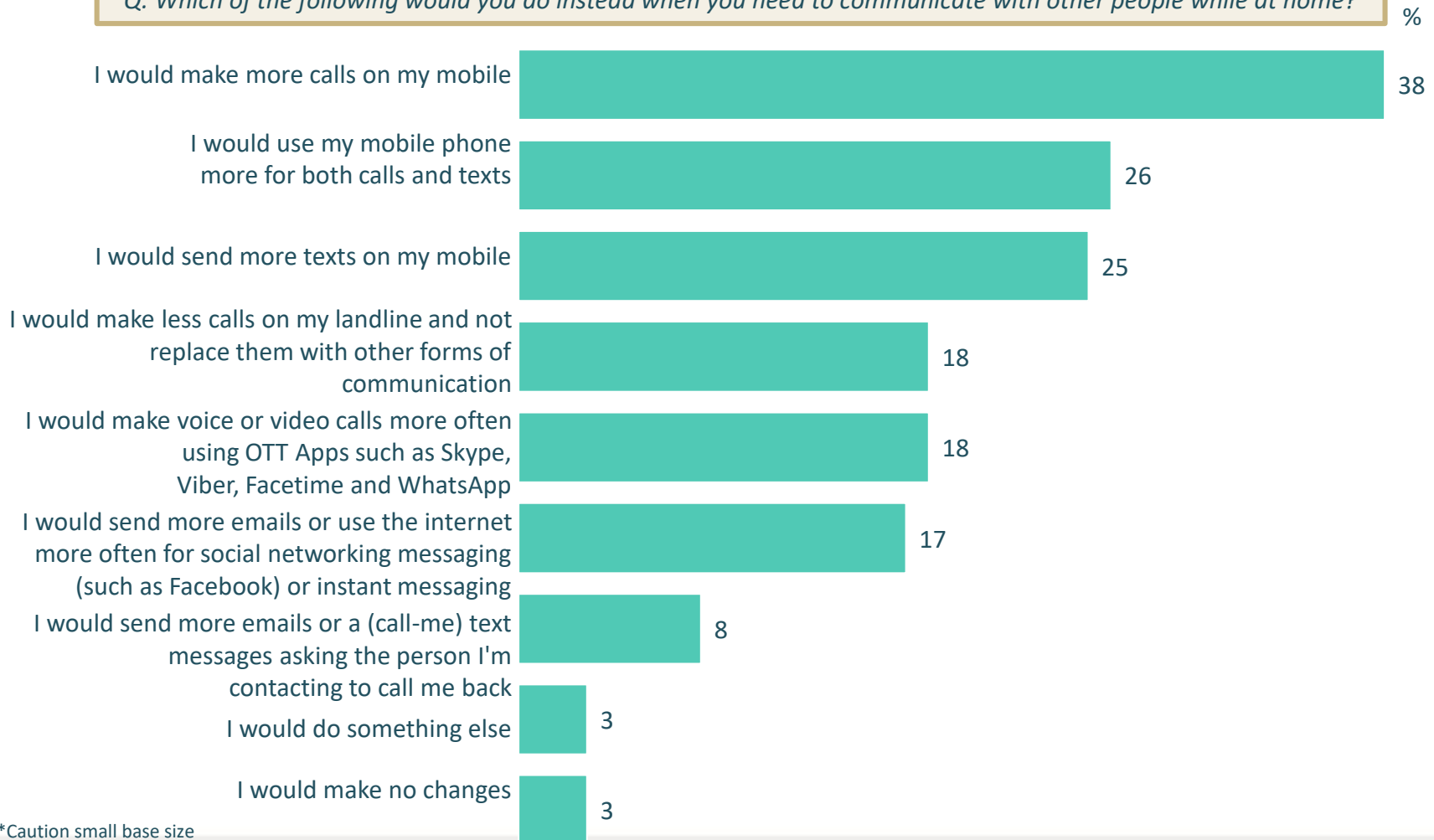
Keeping in mind the small base size of 11, 52% of those saying that they would cancel their service at the previous question say that they would use their mobile phone as an alternative.



Method of Communication Likely to Use Instead of Fixed Line

(Base: All likely to cancel or reduce calls – 30*)

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



*Caution small base size

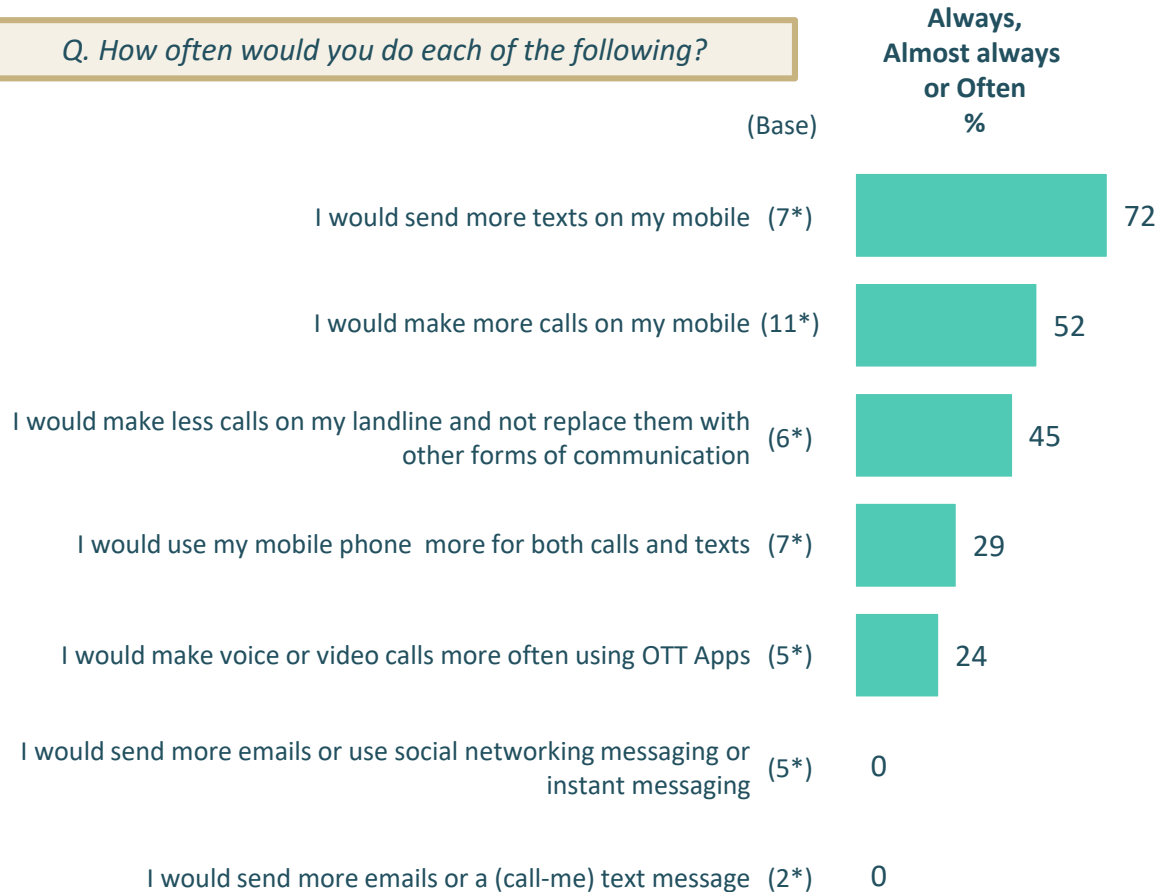
In terms of those surveyed that would cancel or reduce calls in the event of a 1c p/m increase on landline to landline (on a different network) calls, 38% believe that they would use their mobile more often for calls. Please note the small base size.



Frequency of Communicating Method

(Base: All adults changing communication to each method*: Base size in brackets below)

Q. How often would you do each of the following?



*Caution small base sizes

Looking at those surveyed that would cancel or reduce calls in the event of a 1c p/m increase on landline to landline (on a different network) calls and send more texts on mobile instead, 72% of these have said they would send texts often, almost always or always. Please note the small base size.

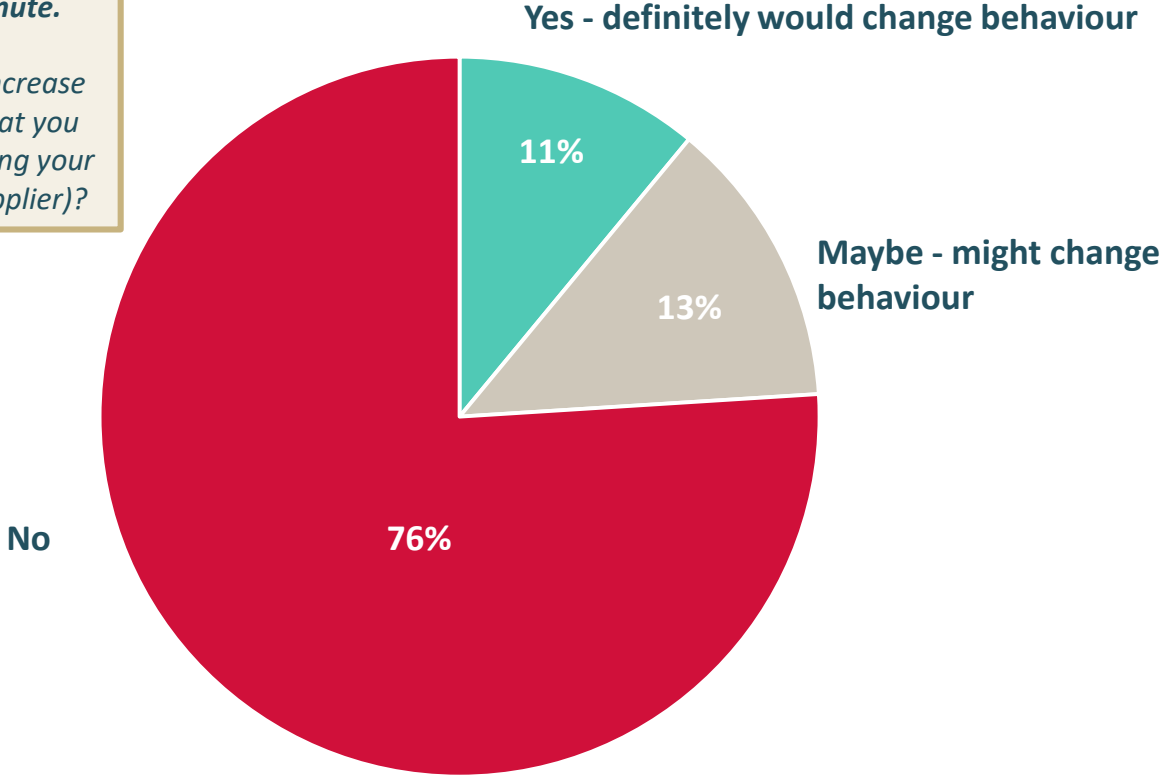


Calling from Landline To Mobile Prices Increased by 1 Cent p/m What Action Would be Taken?

(Base: All using fixed line and not with a bundle – 132)

Imagine if the cost of a phone call from your landline to mobile phones increased by 1 cent per minute.

Q. As a consequence of this 1 cent per minute increase in the cost of calls to mobiles, do you believe that you would change your behaviour (including cancelling your bill or potentially switching to an alternative supplier)?



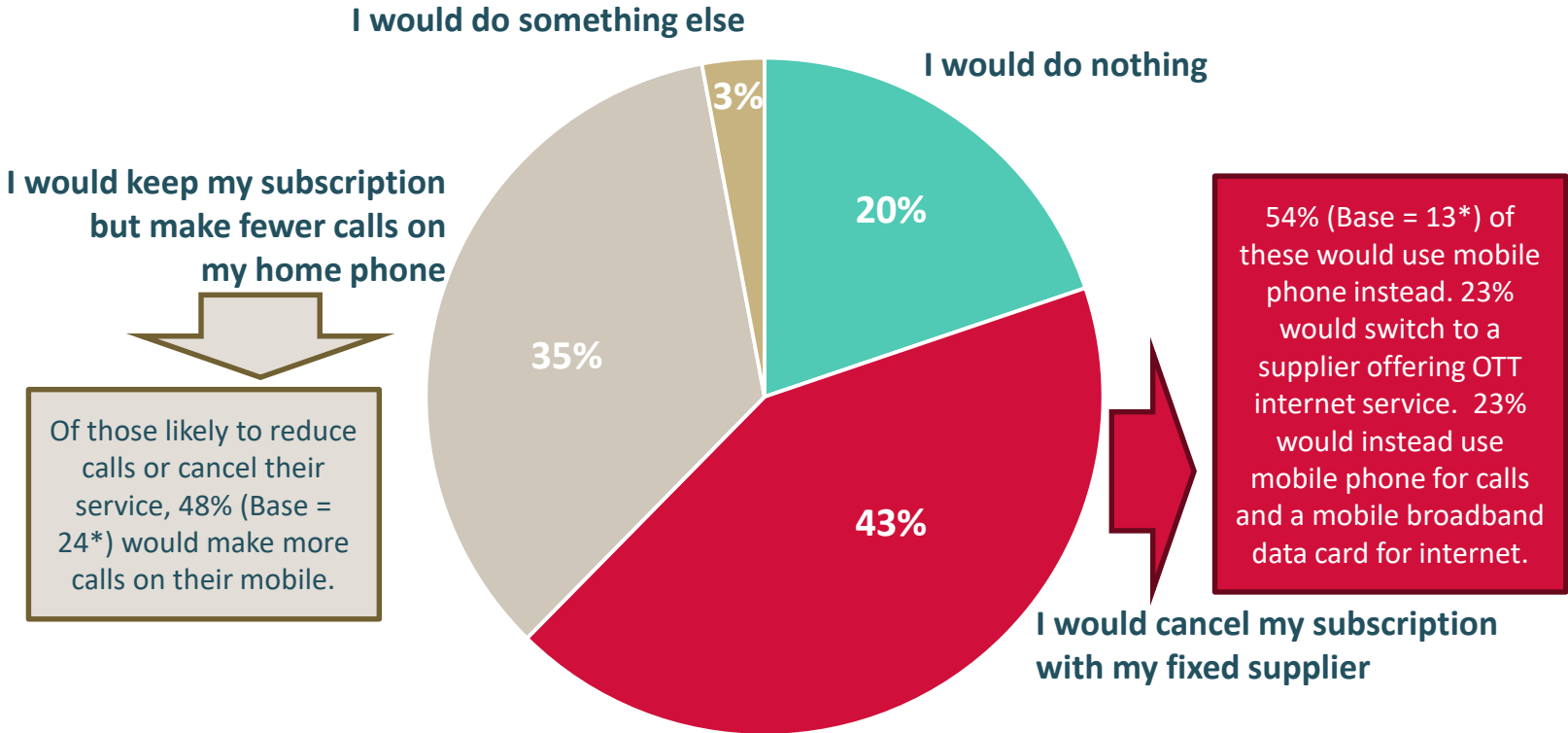
76% of those surveyed that have a non-bundled fixed line say that they would maintain their current usage if landline to mobile costs were to increase by 1 cent per minute.



Likely Action If Cost from Landline To Mobile Increased By 1 Cent (Non-Bundle) (Definitely or Maybe Change Behaviour)

(Base : All who might or would change behaviour as result of 1 cent increase (non bundle), 32*)

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



*Caution small base size

43% of respondents that said they might or would change behaviour due to a 1c p/m increase in cost for landline to mobile calls, maintain that they would cancel their fixed line service in the event of a price increase. Please note the small base size.

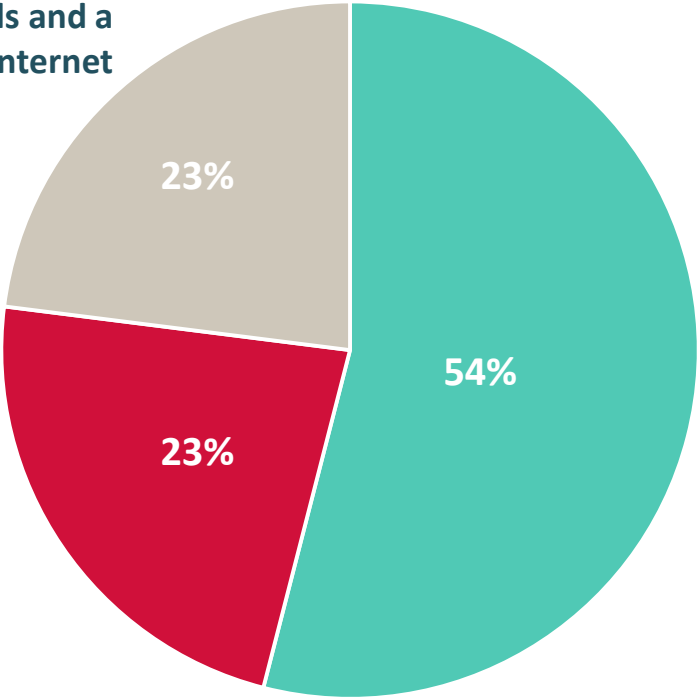


Action Likely to Take Instead of Having Fixed Line (Non-Bundle)

(Base: All likely to cancel service (non bundle) – 13*)

Q. You have just said that you would cancel your subscription, what would you do instead?

Give up my fixed line connection and instead use my mobile phone for calls and a mobile broadband/data card for internet



I would cancel my fixed line connection and use my mobile phone instead

Cancel and switch to a supplier offering OTT Internet service

*Caution small base size

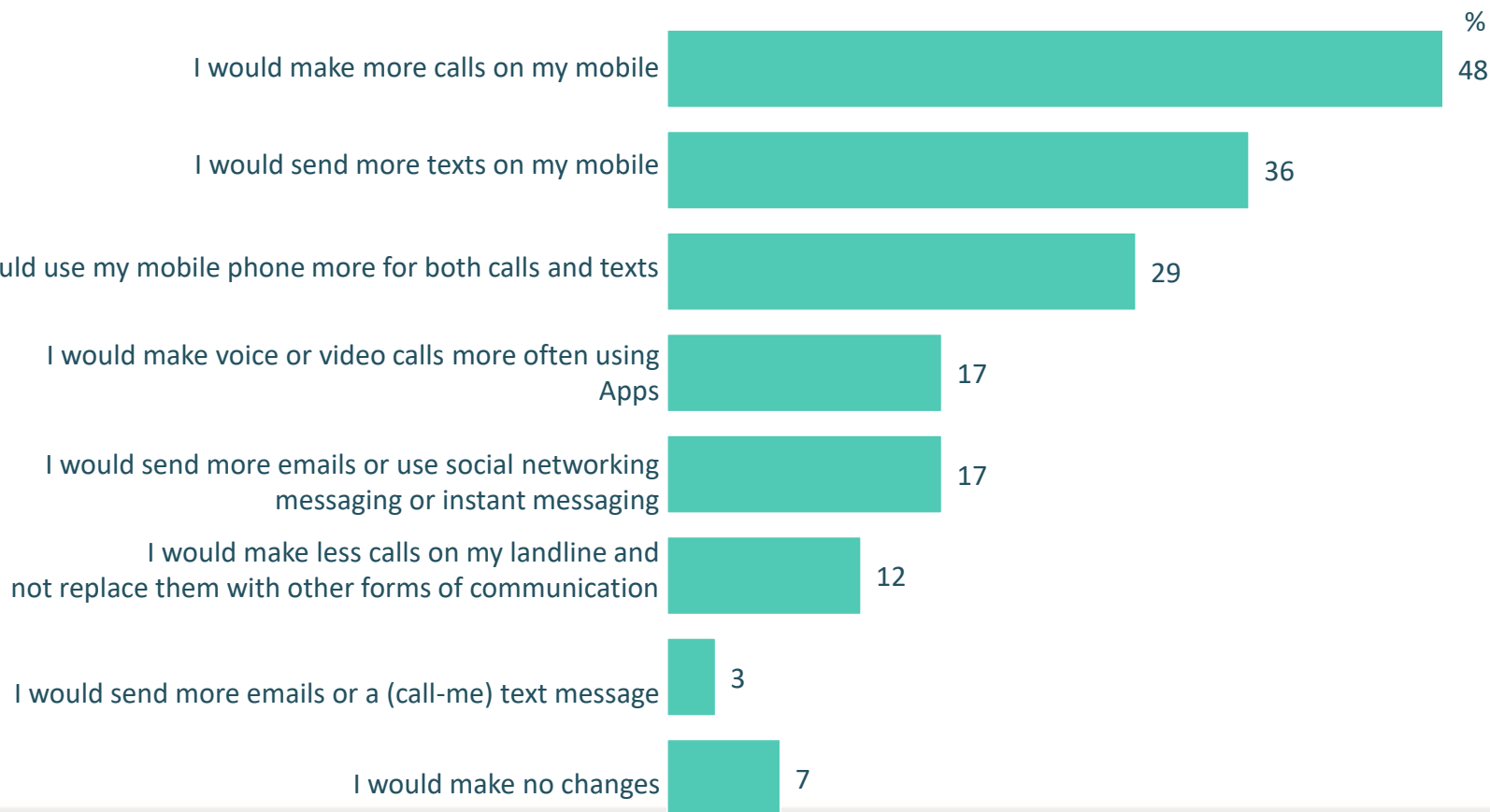
54% of respondents with a non-bundled fixed line that would cancel their fixed line service if landline to mobile calls increased by 1c p/m, would switch to sole mobile use if costs were to be increased. Please note the small base size.



How Likely to Communicate If Cancel or Reduce Fixed Line Calls (Non-Bundle)

(Base: All likely to cancel or reduce calls (non-bundle) – 24*)

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



*Caution small base size

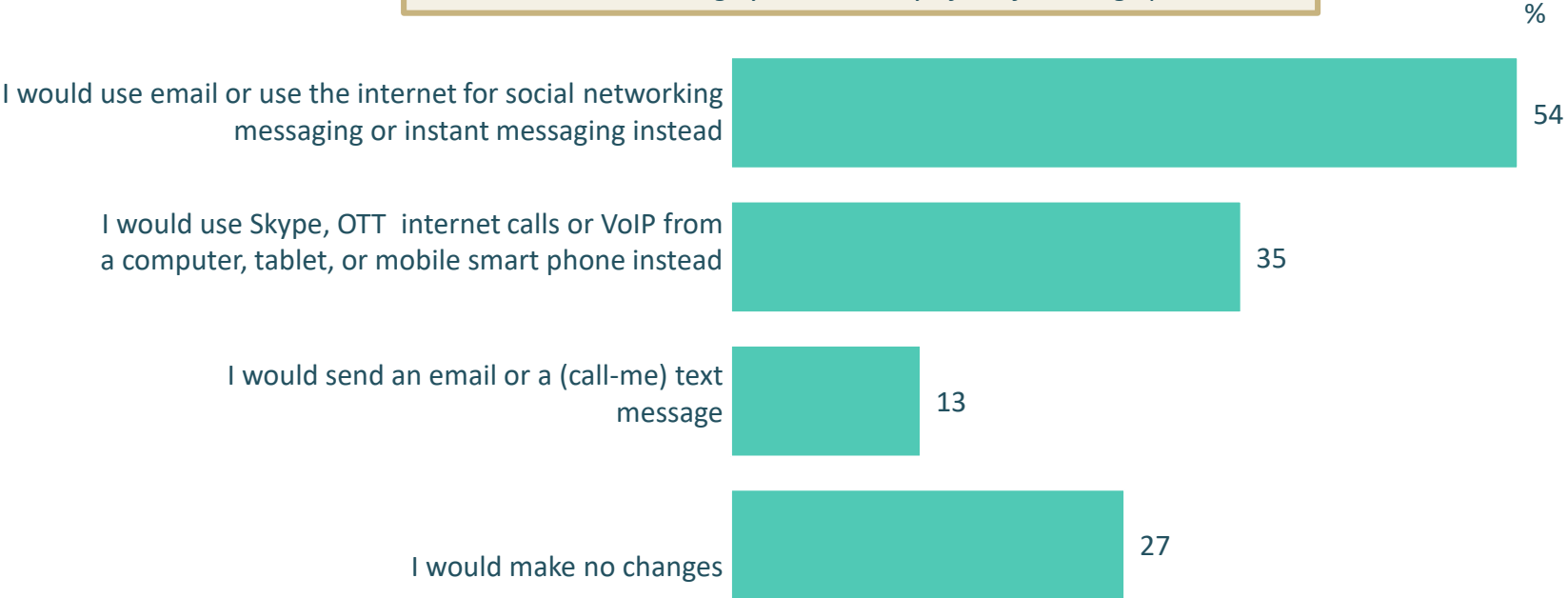
Amongst the non-bundled fixed line owners in the survey that would likely cancel their fixed line or reduce landline calls in the event of a 1c p/m increase on landline to mobile calls, 48% of them would make more calls on their mobile. Please note the small base size.



If Mobile to Mobile Calls Increased By 1 Cent What Action Would be Taken (Non-Bundle)

(Base: All adults likely to use mobile more as a result of increase in fixed line (non-bundle) – 19*)

Q. If the cost of mobile to mobile calls also goes up by 1c per minute would this encourage you to use any of the following options?



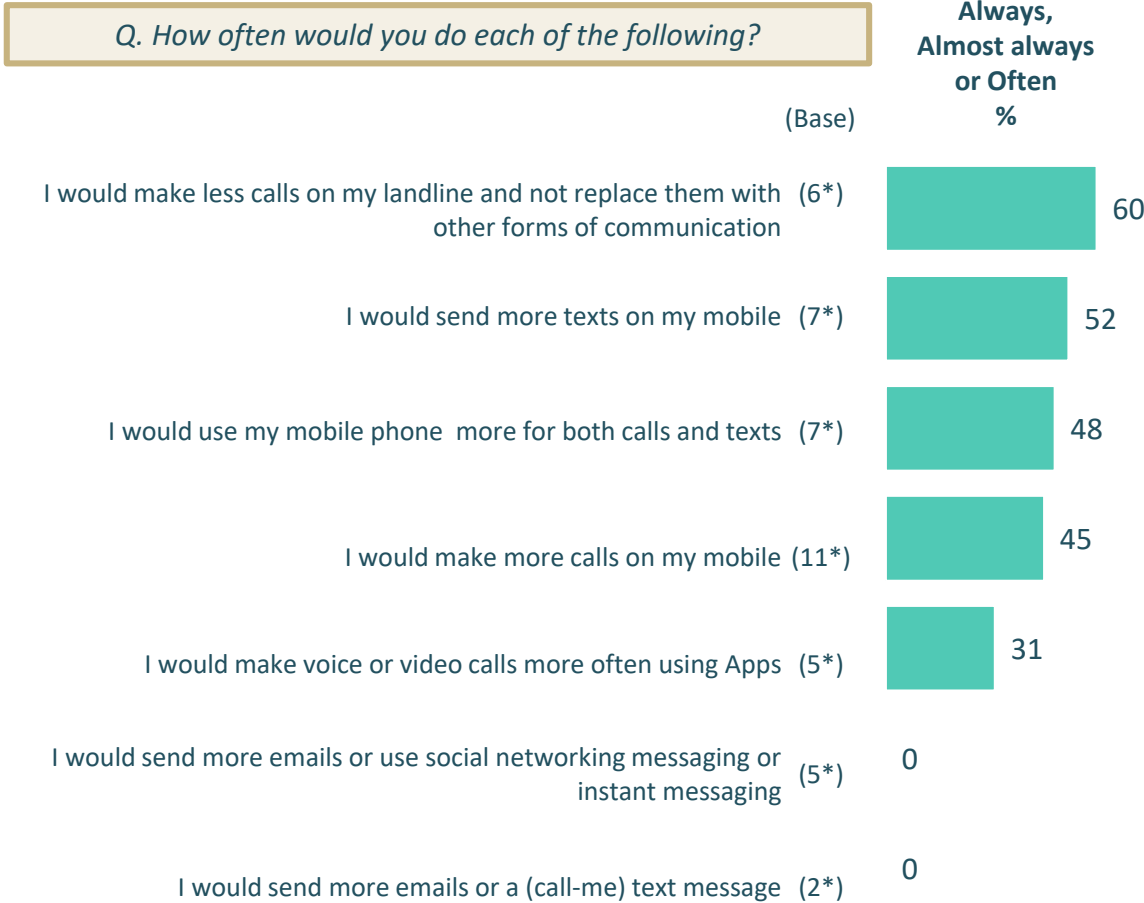
*Caution small base size

Amongst respondents that would likely use mobile more as a result of increase in fixed line (non-bundle) calls, if mobile calls also were to increase by 1c p/m, 54% would use email/social networking/ instant messaging as a means of communication. Please note the small base size.



Frequency of Communicating Method

(Base: All adults changing communication to each method (Non-Bundle)*: Bases shown in brackets below)



*Caution small base sizes

60% of respondents that own a non-bundled fixed line that would likely cancel or reduce usage if landline calls increased by 1c p/m and have said that they “would make less calls on my landline and not replace them with other forms of communication” would do this often, almost always or always. Please note small sample size.





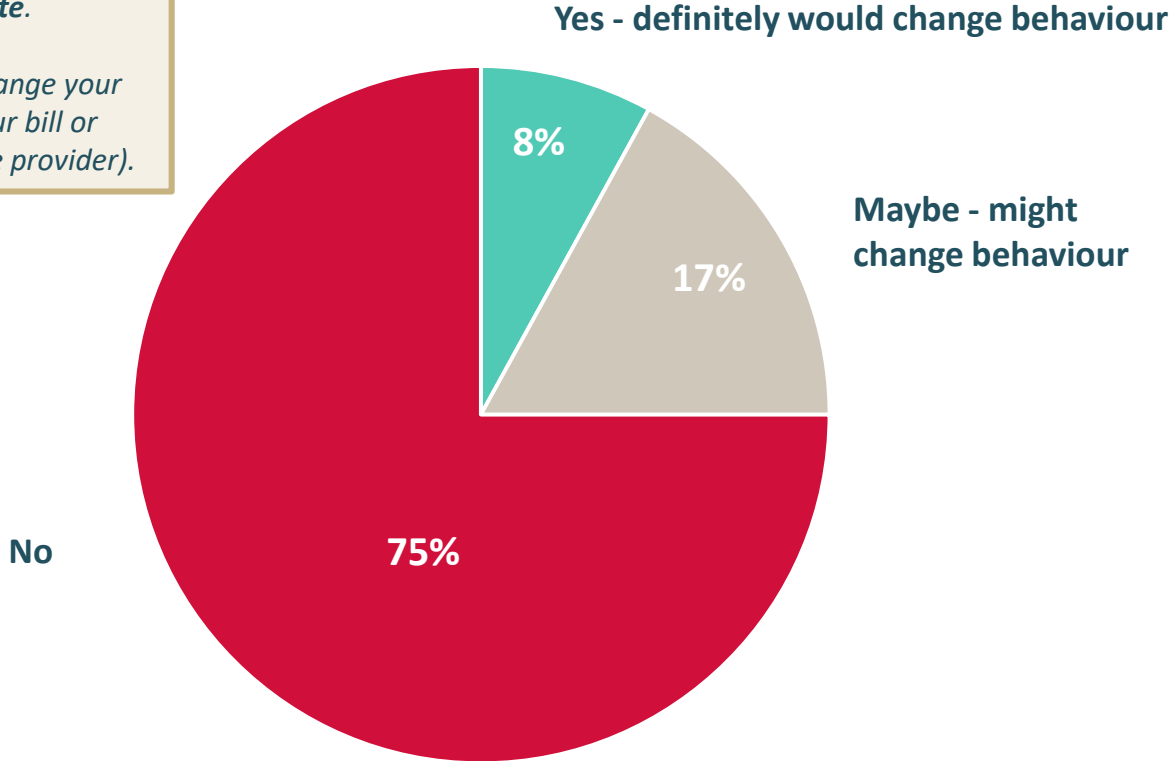
SSNIP (Bundle)

Change In Behaviour if 1 Cent p/m increase from Landline to Landline (Other Network)

(Base: All who purchased fixed line as part of bundle – 485)

Imagine if the cost of calls in your bundle from your landline to other landlines on a different network/different landline provider to you increased by 1 cent per minute.

Q. Do you believe that you would change your behaviour (including cancelling your bill or potentially switching to an alternative provider).



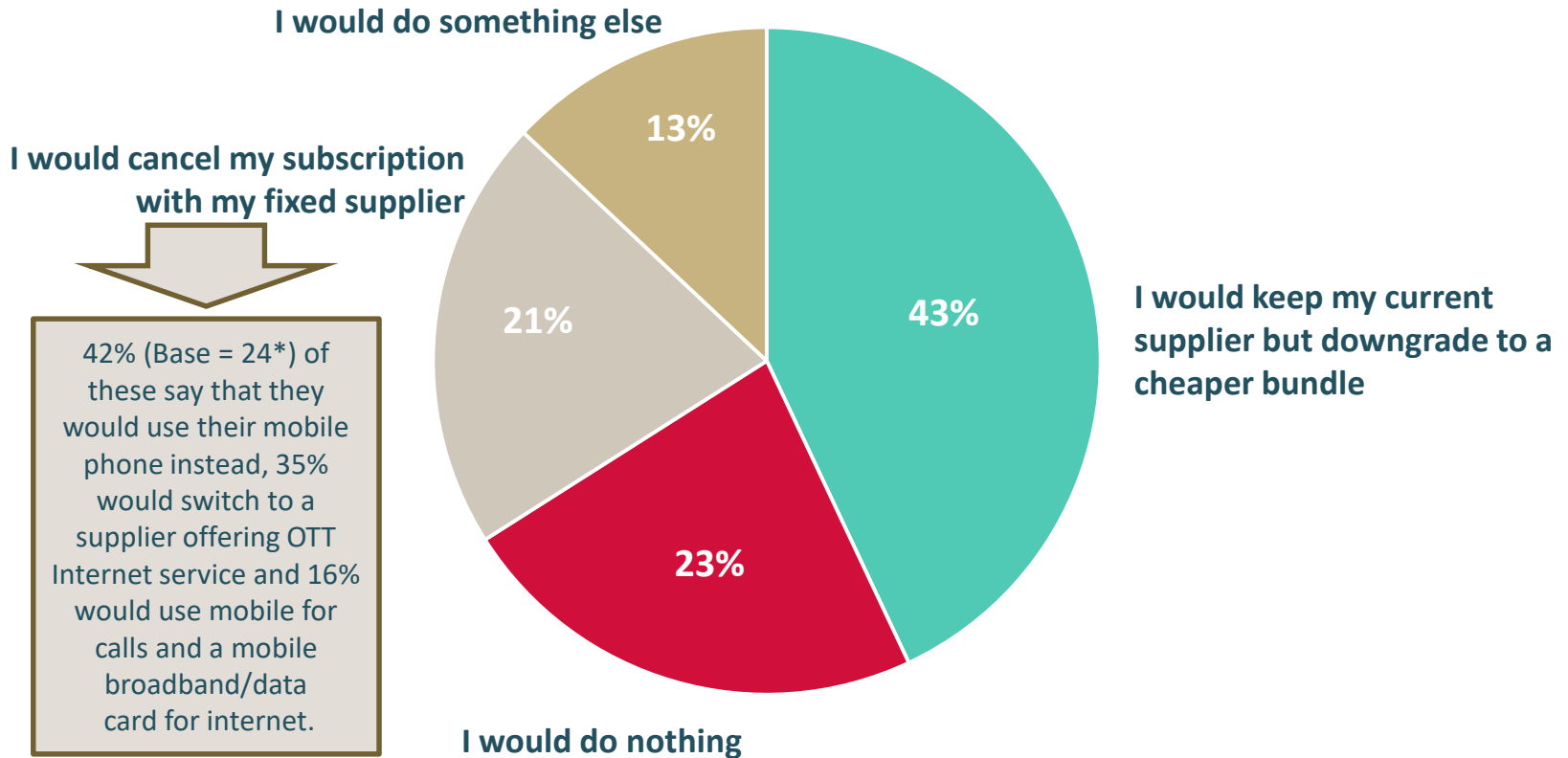
75% in this survey that have their landline as part of a bundle would not change their behaviour if landline calls to landlines on other networks were to increase by 1 cent per minute.



Likely Action if Landline to Landline Prices Increased by 1 Cent (Definitely or Maybe Change Behaviour)

(Base: All who use fixed line and a bundle who might or would change behaviour as a result of 1 cent increase – 121)

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



*Caution small base size

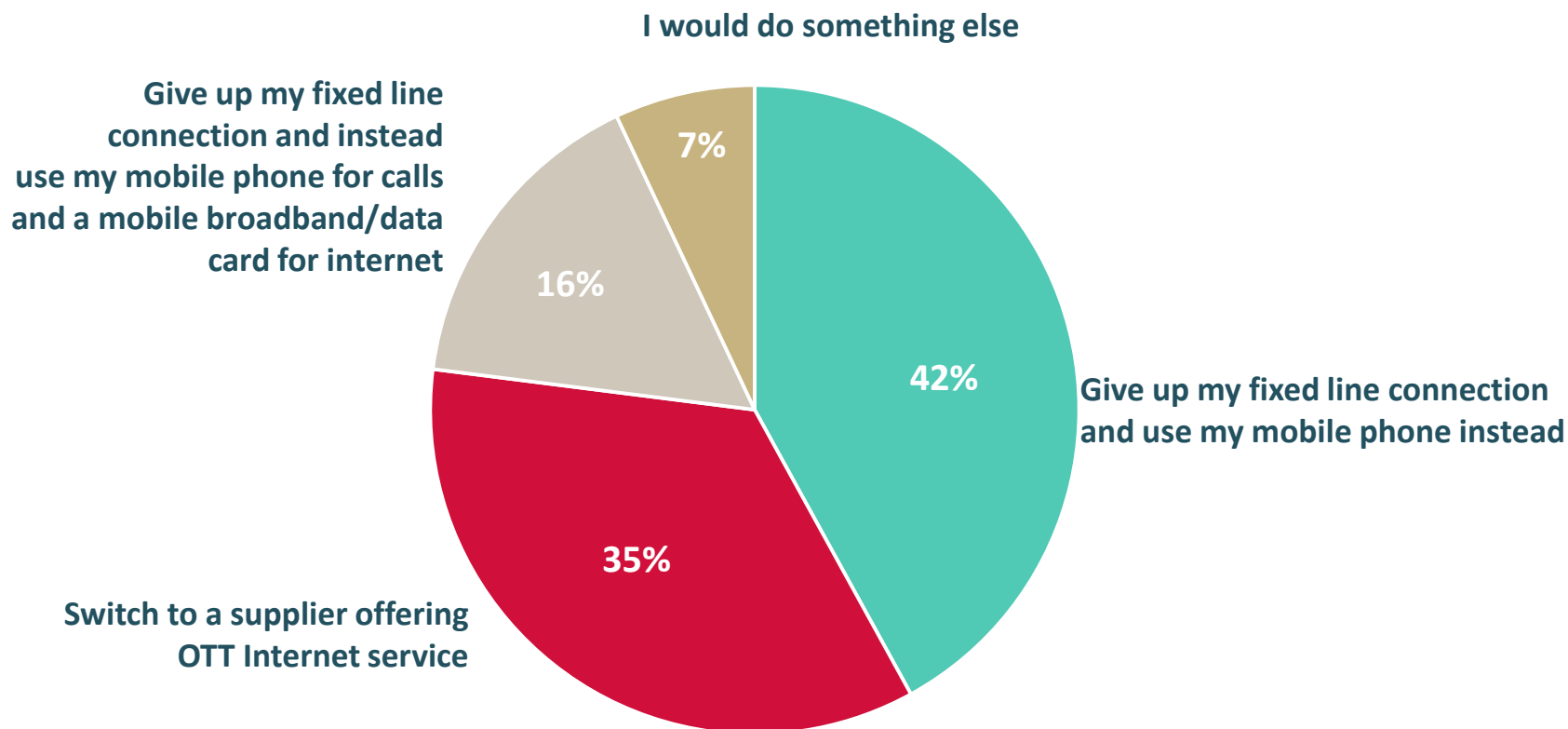
21% of those that completed the survey and own a bundled fixed line service and might or would change behaviour due to a 1c p/m increase on calls from landline to landline (on a different network), would cancel their service, while 43% would keep their current supplier but downgrade to a cheaper bundle.



What Action Would be Taken If Cancelled Service

(Base: All who use fixed line and a bundle who would cancel subscription – 24*)

Q. You have just said that you would cancel your subscription, what would you be likely to do instead?



*Caution small base size

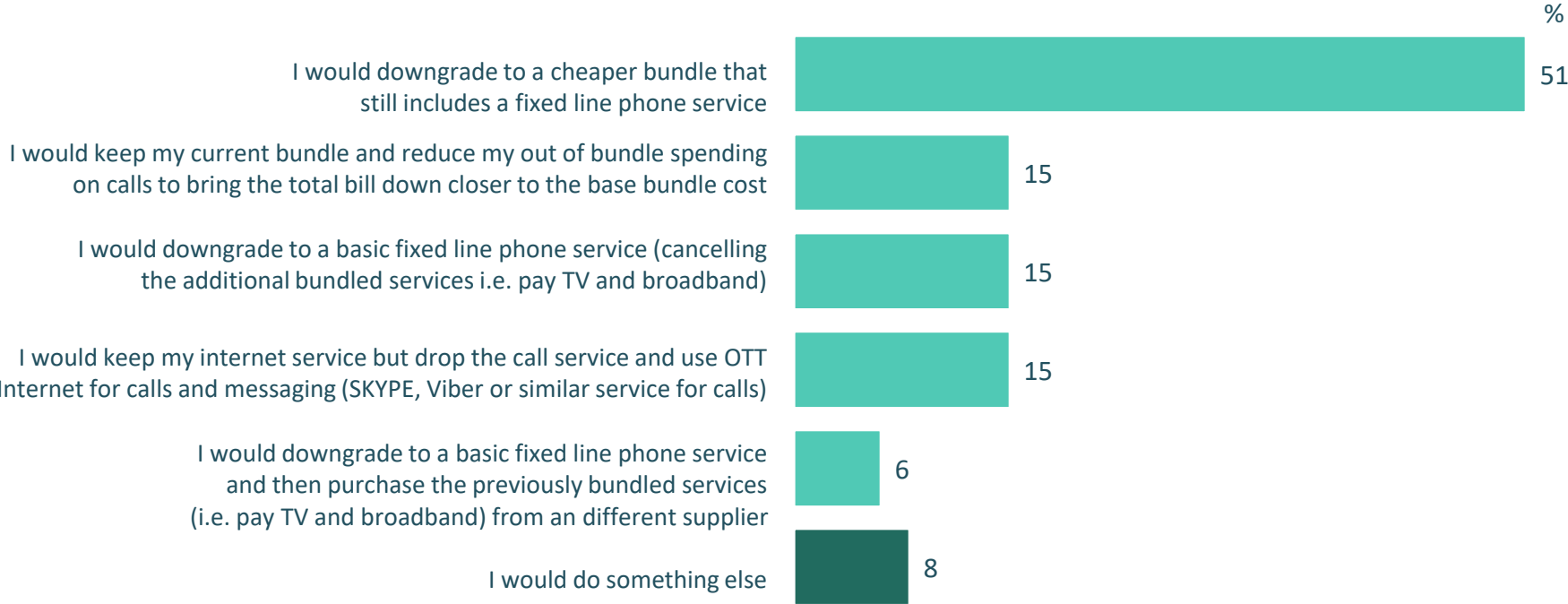
Amongst those doing the survey that own a bundled fixed line and would cancel their subscription if calls from landline to other network landlines increased by 1c p/m, 42% would use mobile instead, while 35% would avail of a OTT Internet services.



Changing bundles as a Result of Increase Cost 1 Cent per minute

(Base: All likely to cancel or downgrade (Bundle) – 74)

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



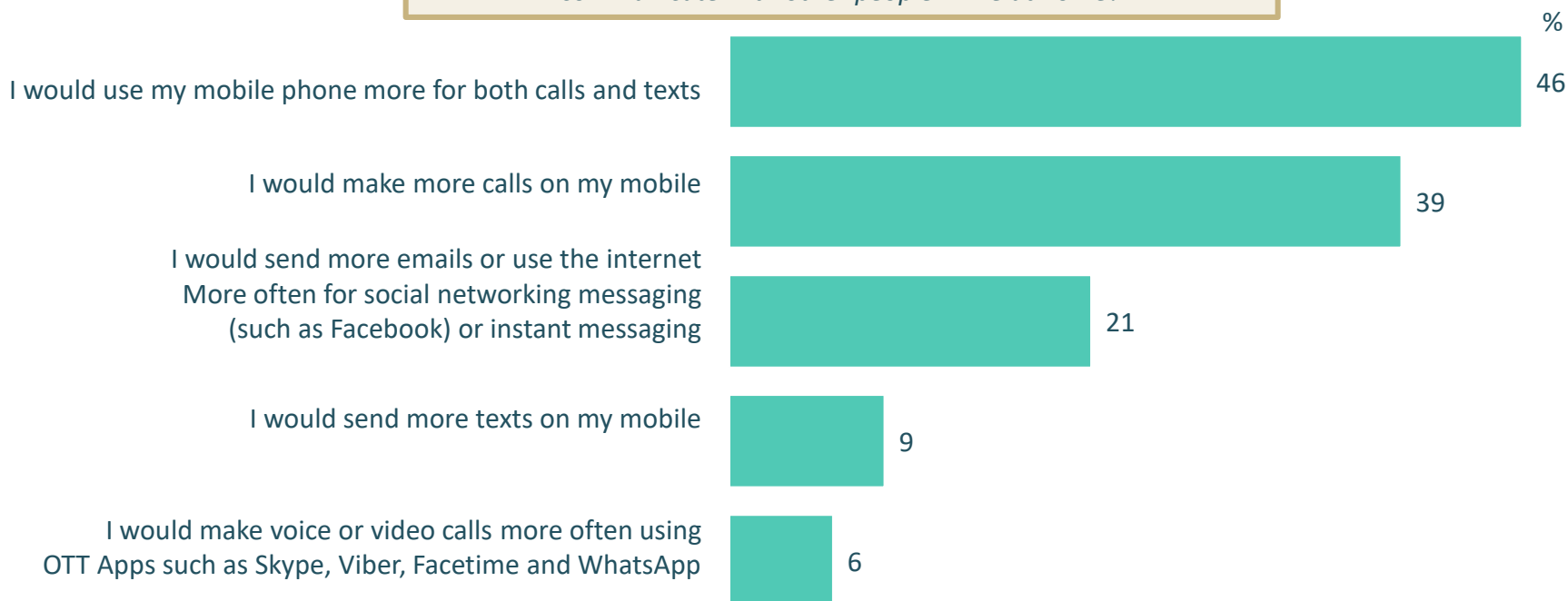
Amongst bundled fixed line owners in this survey that would likely cancel or downgrade their bundle if calls from landline to other network landlines increased by 1c p/m, 51% would change to a cheaper bundle that still includes a fixed line service.



Method of Communication Instead of Fixed Line (Bundle)

(Base: All likely to give up fixed line (Bundle) – 14*)

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



*Caution small base size

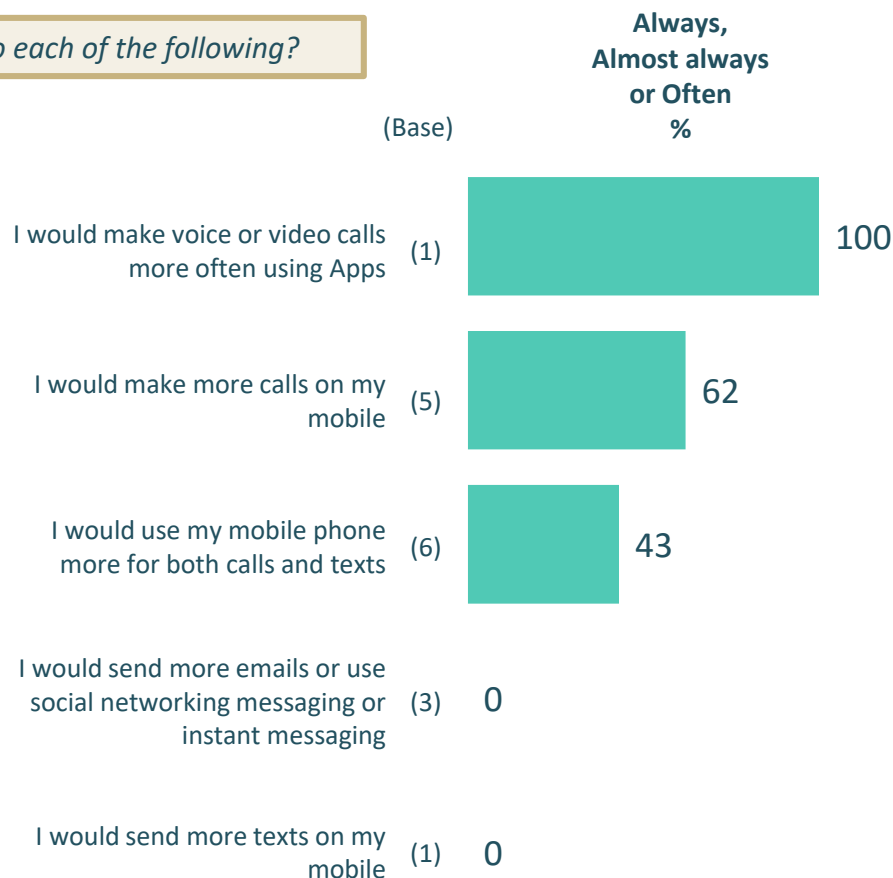
Amongst bundled fixed line owners claiming in the survey that they would likely cancel their subscription, 46% feel that they would increase their usage of their mobile phone for both calls and texts. Please note the small base size.



Frequency of Communicating Method (Bundle)

(Base: All adults changing communication to each method (Bundle)*: Bases shown in brackets below)

Q. How often would you do each of the following?



*Caution small base sizes

Amongst those in the survey on a bundle that would change their communication method in the event of a 1c p/m increase on landline to landline (on a different network) calls and that would make more calls on their mobile, 62% would do this often, almost always or always. Please note the small base sizes.

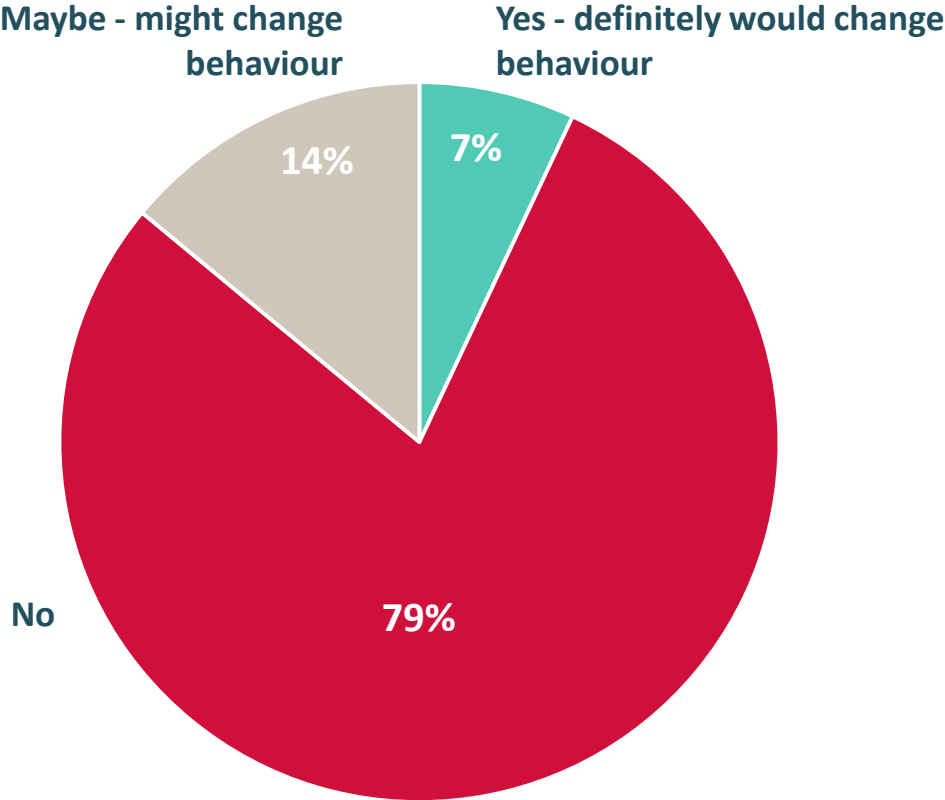


Change If Landline To Mobile Prices Increased By 1 Cent per minute(Bundle)

(Base: All who purchased fixed line as part of bundle – 485)

Imagine if the cost of calls in your bundle from your landline to mobile phone increased by 1 cent per minute.

Q. Do you believe that you would change your behaviour (including cancelling your bill or potentially switching to an alternative provider).



*Caution small base size

Of those surveyed that own a landline as part of a bundle, if landline to mobile calls increased by 1c p/m, 7% would change their behaviour in terms of how they use their fixed line service, while 14% might change behaviour.

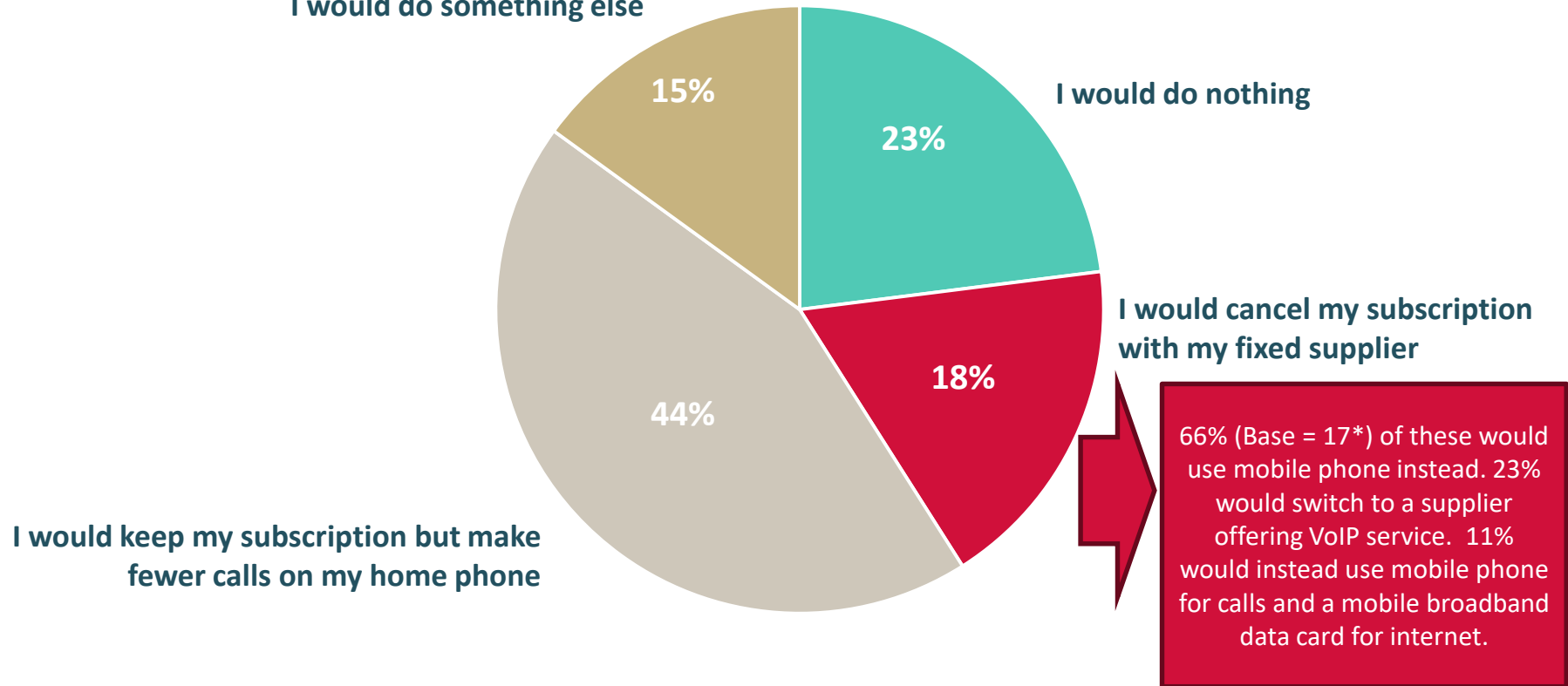


Likely Action If Bundle From Landline To Mobile By 1 Cent (Definitely or Maybe Change Behaviour)

(Base: All who might or would change behaviour as a result of 1 cent increase (Bundle) – 101)

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

I would do something else



*Caution small base size

In response to a 1 cent per minute increase on landline to mobile calls, 44% of bundled fixed line owners in this survey that might or would change behaviour, would make fewer calls from their home phone but maintain their subscription.



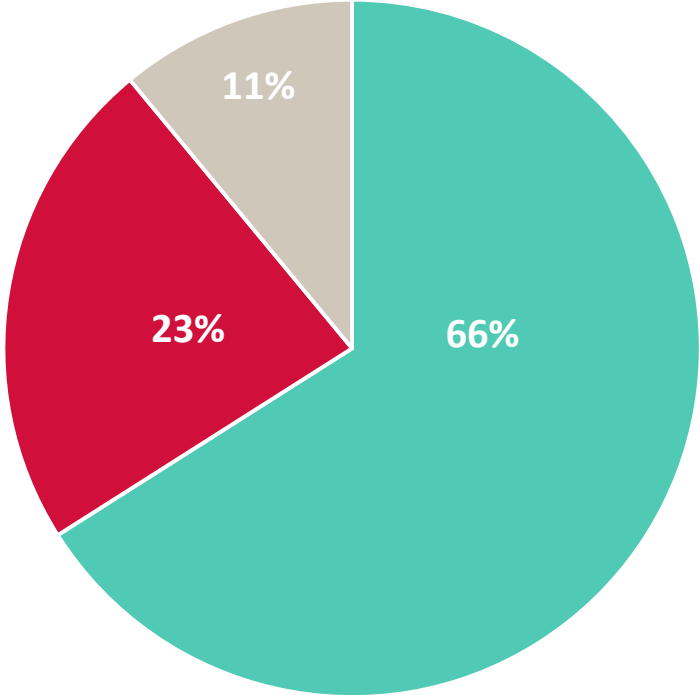
Action Instead of Having Fixed Line (Bundle)

(Base: All who use fixed line and a bundle who would cancel subscription – 17*)

Q. You have just said that you would cancel your subscription, what would you be likely to do instead?

Give up my fixed line connection and instead use my mobile phone for calls and a mobile broadband/data card for internet

Switch to a supplier offering VoIP service (SKYPE, Viber for voice or messaging)



Give up my fixed line connection and use my mobile phone instead

*Caution small base size

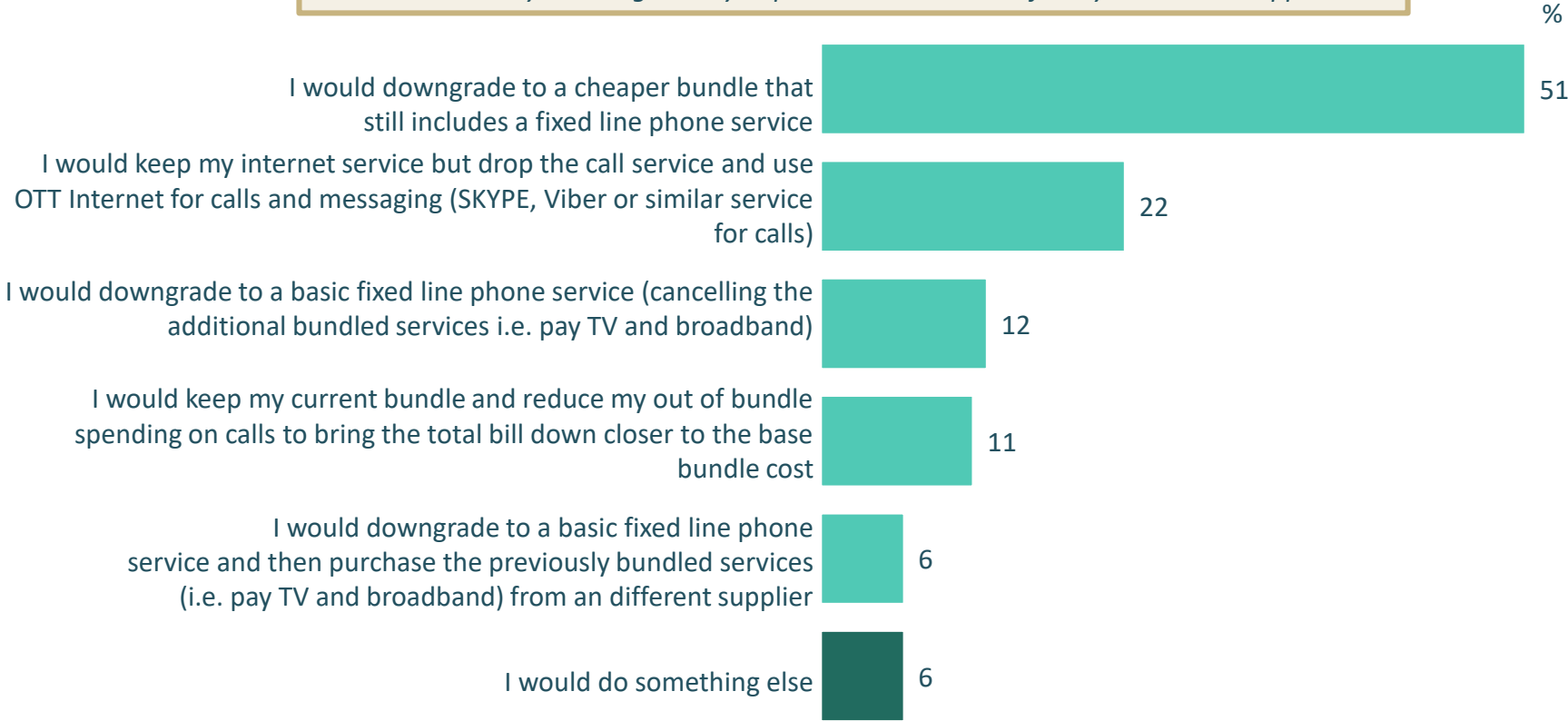
Amongst survey respondents with a fixed line on a bundle that would cancel their landline service if calls to mobiles increased by 1c p/m, 66% would use their mobile phone instead. Please note the small base size.



Change in Purchase of Services as a Result of Increase (Bundle)

(Base: All likely cancel or downgrade (Bundle) – 60)

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



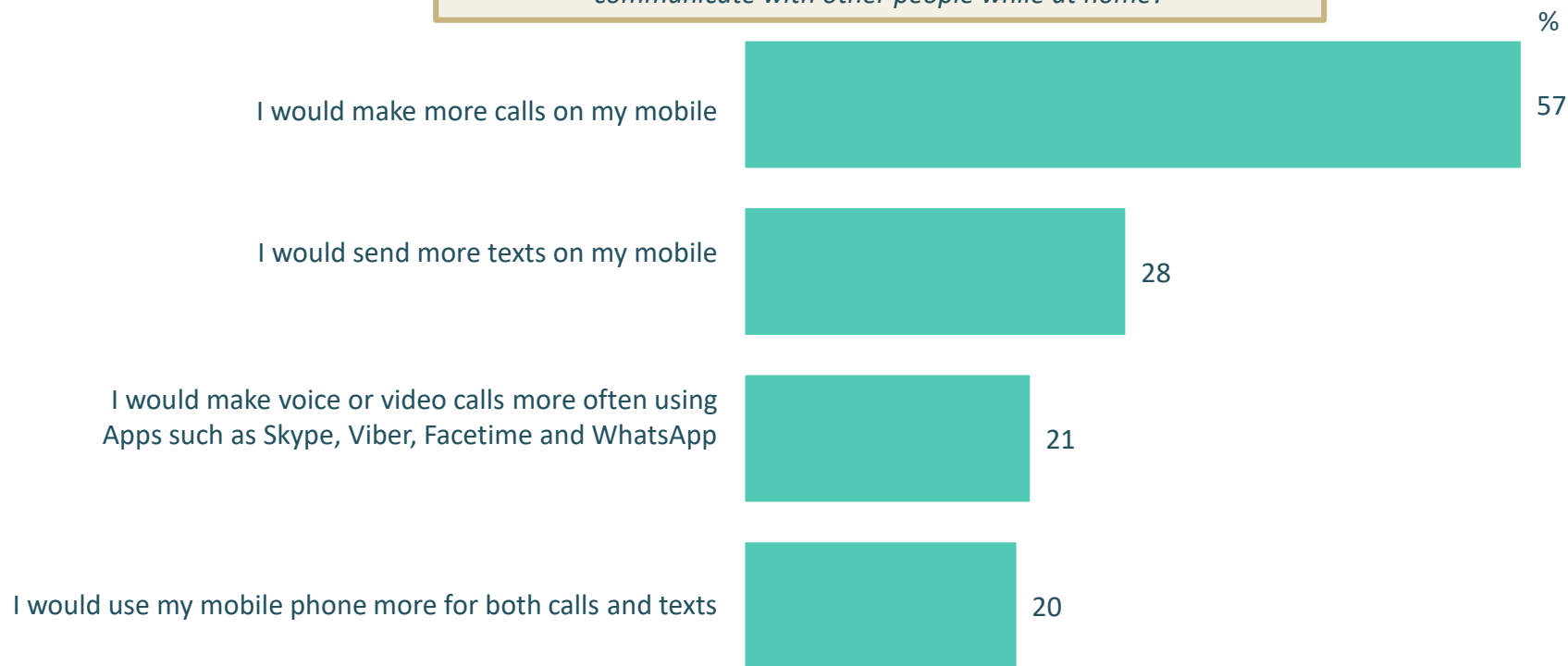
Half of bundled fixed line owners in the survey that are likely to cancel or downgrade if landline to mobile calls increased by 1c p/m would downgrade to a cheaper bundle that still includes a landline service.



How Likely to Communicate If Cancel or Reduce Fixed Line Calls

(Base: All likely cancel or reduce calls (Bundle) – 13*)

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



*Caution small base size

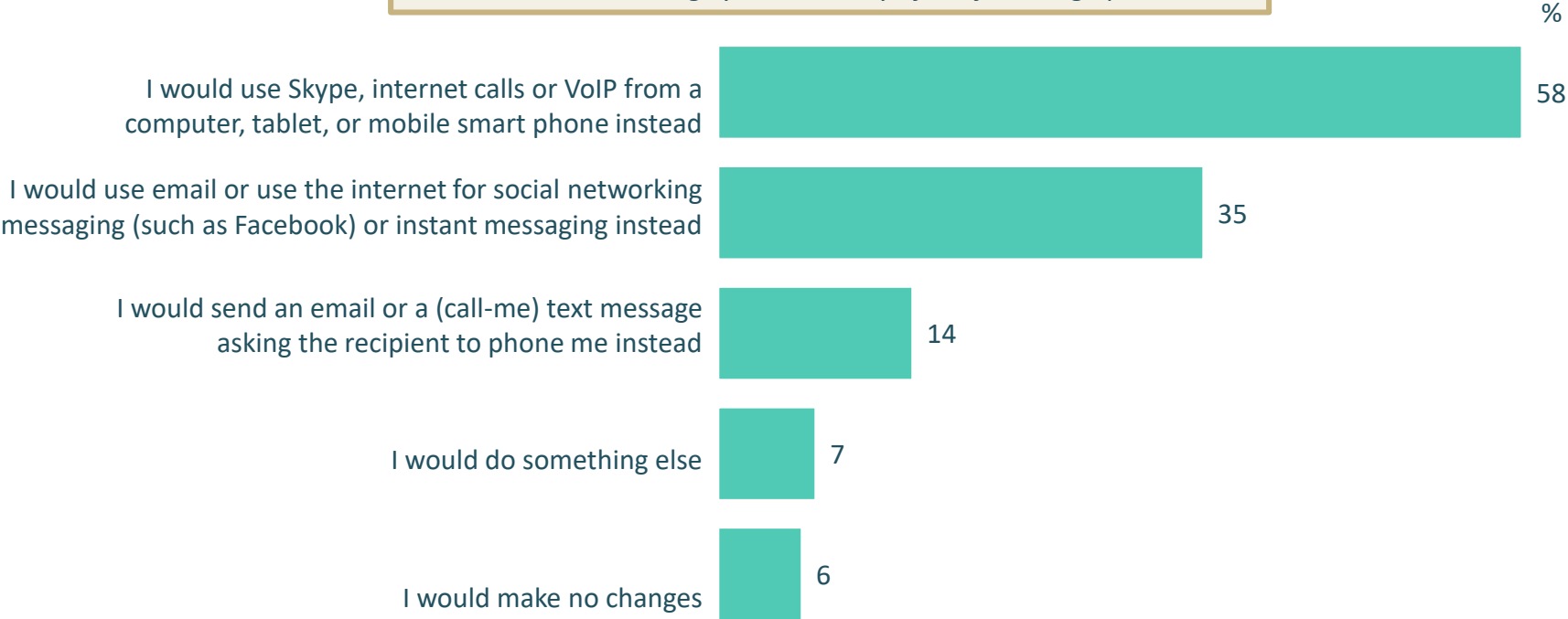
57% of those in the survey on a bundle that are likely to cancel or reduce calls in response to a 1 cent p/m increase to fixed line calls would make more calls from mobile. Please note the small base size.



Implications of Mobile to Mobile Calls Increase By 1 Cent (Bundle)

(Base: All adults likely to use mobile more as a result of increase in fixed line (Bundle) – 14*)

Q. If the cost of mobile to mobile calls also goes up by 1c per minute would this encourage you to use any of the following options?



*Caution small base size

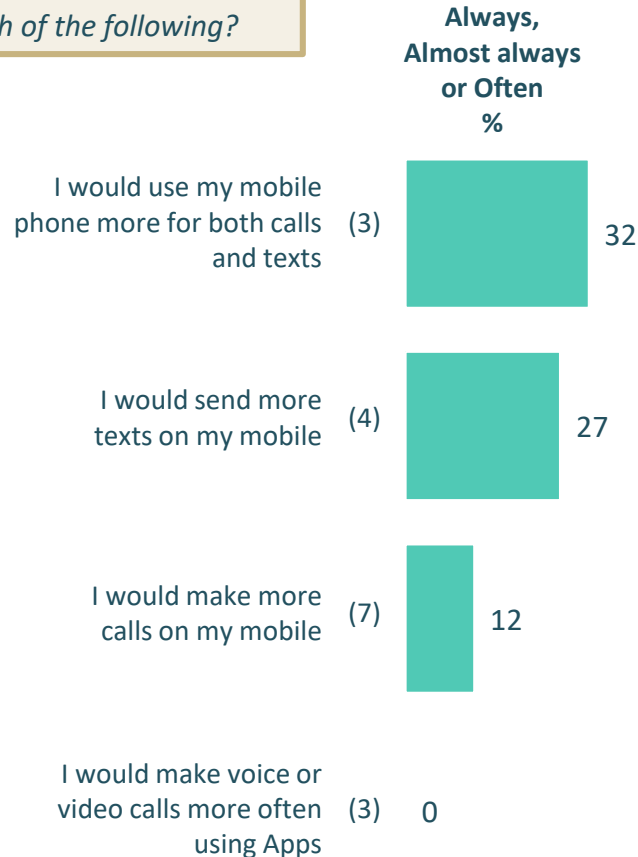
Amongst survey respondents with a fixed line on a bundle that are likely to use mobile more as a result of 1c p/m increase on landline to mobile calls, 58% would likely use internet calls instead in this circumstance. Please note the small base size.



Frequency of Communicating Method (Bundle)

(Base: All adults changing communication using each method (Bundle)*)

Q. How often would you do each of the following?



*Caution small base sizes

In this survey, 12% of fixed line owners on a bundle that would change their communication method if landline to mobile calls went up by 1c p/m and that would make more mobile calls instead, would do this often, almost always or always. Please note the small base sizes.





Questionnaire

Questionnaire



165716 CONSUMER FVCT SURVEY 2016
20-06-16 QUESTIONNAIRE

Good morning/afternoon/evening. I am _____ from RED C Research & Marketing, an independent Irish market research agency. We are carrying out a survey today about access to and usage of telecommunications. Would you mind answering a few questions?

CLASSIFICATION SECTION

SCRIPTER: ASK ALL RESPONDENTS.

BASE: ALL ADULTS

- C.1 Can I check you are responsible or jointly responsible for making the decisions for the household relating to telecommunication services in the home (for instance this could be the decision to get a fixed line phone in your home in the past or future) and/or pays for the telecommunications bills in your household?
1. Yes - Continue
 2. No - Ask for relevant household member

I would like to ask you some general questions about yourself.

INTERVIEWER: DO NOT READ OUT

SCRIPTER: ASK ALL RESPONDENTS.

BASE: ALL ADULTS

C.2. RECORD GENDER

1. Male
2. Female

INTERVIEWER: PROMPT TO AGE BANDS

SCRIPTER: ASK ALL RESPONDENTS.

BASE: ALL ADULTS

C.3 May I ask what age category you were on your last birthday?

1. 18-25
2. 26-35
3. 36-45
4. 46-55
5. 56-65
6. 65+
7. Refused



INTERVIEWER: DO NOT READ OUT. RECORD COUNTY OF INTERVIEW

SCRIPTER: SINGLE CODE

C.4 RECORD COUNTY WHERE INTERVIEW TAKES PLACE

Antrim
Armagh
Carlow
Cavan
Clare
Cork
Derry
Donegal
Down
Dublin
Fermanagh
Galway
Kerry
Kildare
Kilkenny
Laois
Leitrim
Limerick
Longford
Louth
Mayo
Meath
Monaghan
Offaly
Roscommon
Sligo
Tipperary
Tyrone
Waterford
Westmeath
Wexford
Wicklow

INTERVIEWER:**SCRIPTER:** SINGLE CODE. ASK ALL RESPONDENTS.**BASE:** ALL ADULTS

C.5 Which of the following best describes your occupation

1. Full-time education
2. Full-time employment outside of the home
3. Part-time employment outside of the home
4. Carer in the home (looking after relative or family)
5. Employment in the home
6. Not currently in paid employment

SCRIPTER: ASK ALL RESPONDENTS.**BASE:** ALL ADULTS

C.6 What is the occupation of the chief income earner in your household?

+

[CAPTURE OCCUPATION AND CODE AS SOCIO-ECONOMIC GROUP AT END OF SURVEY]

1. AB
2. C1
3. C2
4. DE
5. F [RECORD ALL FARMERS]
6. Refused

SCRIPTER: SINGLE CODE. ASK ALL RESPONDENTS.**BASE:** ALL ADULTS

C.7. How many people live in your household, including yourself?

1. 1
2. 2
3. 3
4. 4
5. 5
6. 6
7. 7
8. More than 7

ACCESS METHODS

SCRIPTER: ASK ALL RESPONDENTS.**BASE:** ALL ADULTS

Q7. Do you have a fixed line phone connection in your home?

1. Yes
2. No
3. Don't Know

INTERVIEWER: NEED TO ESTABLISH IF FIXED LINE PHONE SPECIFICALLY USED FOR MAKING/RECEIVING CALLS**SCRIPTER:** ASK ALL CODE 1 Q7.**BASE:** ALL ADULTS WITH A FIXED LINE PHONE CONNECTION IN HOME

Q8. Can I confirm that you have a telephone in your household that is connected (either via a corded or cordless handset) to your fixed line connection and is used in your household to make or receive personal calls?

1. Yes
2. No
3. Don't Know

SCRIPTER: ASK ALL RESPONDENTS WHO ANSWERED CODE 1 AT Q.8. SINGLE CODE**BASE:** ALL HOUSEHOLDS WITH A FIXED LINE PHONE CONNECTION

Q9. How many people in your home including yourself regularly use your fixed line phone to make or receive voice calls

1. 1
2. 2
3. 3
4. 4
5. 5
6. 7
7. 8 or more

INTERVIEWER: PROBE TO AREA CODES E.G 01 FOR DUBLIN 021 CORK, OR CAN BE NUMBER STARTING WITH 076
SCRIPTER: ASK ALL RESPONDENTS WHO ANSWERED CODE 1 AT Q.8
BASE: ALL ADULTS WHO HAVE A FIXED LINE PHONE USING FOR VOICE
 Q.10 What is the area code of your phone line you use for personal calls?

INTERVIEWER – RECORD AREA CODE HERE – — — — —

PRECODED LIST:

| | |
|------|-----|
| 01 | 059 |
| 021 | 061 |
| 022 | 062 |
| 023 | 063 |
| 024 | 064 |
| 025 | 065 |
| 026 | 066 |
| 027 | 067 |
| 028 | 068 |
| 029 | 069 |
| 0402 | 071 |
| 0404 | 074 |
| 041 | 090 |
| 042 | 091 |
| 043 | 093 |
| 044 | 094 |
| 045 | 095 |
| 046 | 096 |
| 047 | 097 |
| 049 | 098 |
| 0504 | 099 |
| 0505 | |
| 051 | |
| 052 | |
| 053 | |
| 056 | |
| 057 | |
| 058 | |

INTERVIEWER: RECORD NUMBER PER HOUSEHOLD EXCLUDING SELF
SCRIPTER: ASK ALL RESPONDENTS
BASE: ALL ADULTS
 Q11 How many people who live in your home (including yourself) own and regularly use a mobile phone?

1. 1
2. 2
3. 3
4. 4
5. 5
6. 6
7. 7 or more

SCRIPTER: ASK ALL RESPONDENTS
BASE: ALL ADULTS
 Q12 Do you personally own and use a mobile phone?
 1. Yes
 2. No

INTERVIEWER: SHOWCARD 1. MULTICODES POSSIBLE
SCRIPTER: ASK ALL RESPONDENTS
BASE: ALL ADULTS

Q13 Thinking about different ways you can access the internet in your home which of the following means of accessing the internet, if any, are used within your household.

1. Traditional fixed telephone line
2. Cable TV provider (example broadband services provided by Virgin Media)
3. Fixed broadband provided by a Fibre network (example eir next generation fibre network)
4. Internet access over Mobile Phone using 3G/4G data package
5. 3G/4G Mobile Broadband (through a dongle attached to computer, Mi-Fi devices, 3G/4G sim card in Tablets)
6. Broadband provided by Satellite
7. Fixed wireless connection, provided via a modem that receives radio signals through the air (example of providers offering this service – Imagine Broadband, Ripplecom)
8. Any other form of broadband internet connection (please specify)
9. Don't Know

INTERVIEWER: SHOWCARD 2
SCRIPTER: ASK ALL RESPONDENTS WHO ANSWER CODE 5 AT Q.13
BASE: ALL ADULTS WHO SAID THEY CONNECT USING 3G/4G MOBILE BROADBAND

Q14 You mentioned that your access to broadband is via 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?

1. Yes – it is a mobile broadband connection using a mobile service provider and a USB stick/dongle or Mi-Fi device
2. No – (SCRIPTOR – NOT MOBILE BROADBAND GO BACK TO Q13 TO IDENTIFY CORRECT ACCESS MODE)

INTERVIEWER: SHOWCARD 3. SINGLE CODE ONLY

SCRIPTER: ASK ALL RESPONDENTS

BASE: ALL ADULTS

Q15 How, if at all, do you and your household mainly watch TV or access TV services?

1. Sky
2. Virgin Media (Previously UPC)
3. Saorview
4. Saorsat
5. Eircom/eVision
6. Magnet
7. Freesat
8. Netflix
9. Catch Up Players (RTE Player/TV3 Player)
10. Apple TV
11. Chromecast TV
12. Access TV through the internet (please specify ...)
98. Others (please specify)
97. Don't have a TV subscription
99. None

INTERVIEWER: READ OUT. MULTICODE

SCRIPTER: ASK ALL RESPONDENTS WHO DID NOT ANSWER CODE 3 AT Q.13

BASE: ALL ADULTS WHO SAID THEY DO NOT CONNECT USING FIXED BROADBAND

Q16 Why don't you have a fixed broadband connection in your home?

1. I don't need internet access at home
2. I prefer to use dial-up internet access
3. I prefer to use mobile internet over the phone
4. I prefer to use mobile broadband modem (e.g. USB or dongle) from a mobile phone operator
5. There is no broadband available in my area
6. I want to reduce my household bills
7. I cannot afford broadband
98. Other _____ please specify
99. Don't Know

| |
|------------------|
| SERVICE PROVIDER |
|------------------|

INTERVIEWER: SHOWCARD 4. PROBE TO PRE CODES. SINGLE CODE ONLY

SCRIPTER: ASK ALL RESPONDENTS WHO ANSWERED CODE 1 AT Q.8

BASE: ALL ADULTS

Q17a Which company provides the fixed line phone service you mainly use for personal calls?

1. Clearwire
2. Digiweb
3. Vodafone at Home
4. Sky
5. Euphony
6. Gaelic Telecom
7. Imagine
8. Irish Broadband
9. Magnet
10. Pure
11. Smart
12. 3 (including O2)
13. gtc (Formerly eircom)
14. Virgin Media (Formerly UPC)
98. Other _____ (please specify)
97. No other (only show at 17b only)

INTERVIEWER: SHOWCARD 5. PROBE TO PRECODES. SINGLE CODE

SCRIPTER: ASK ALL RESPONDENTS WHO ANSWER CODE 1-3,6-8 AT Q.13

BASE: ALL ADULTS WHO SAID THEY CONNECT USING BROADBAND

Q18a Which company provides your main broadband service in your household?

1. Eir (formerly Eircom)
2. Virgin Media (formerly UPC)
3. Vodafone at home
4. Imagine or Access Telecom
5. Digiweb
6. Magnet
7. Airspeed
8. Fastcom
9. Pure Telecom
10. Ripplecom (also called Amocom, Last Mile)
11. Satellite Broadband (also called Too Way)
12. Casey
13. Crossan
14. Rapid Broadband
15. Ker Broadband
16. Permanet
98. Other _____ (Please specify)
97. No other (only show at 18b only)

INTERVIEWER: SHOWCARD 6. PROBE TO PRECODES. MULTICODE

SCRIPTER: ASK ALL RESPONDENTS WHO ANSWER CODE 5 AT Q.13

BASE: ALL ADULTS WHO SAID THEY CONNECT USING MOBILE BROADBAND

Q19 Which company(s) provides your mobile broadband service, e.g. using a USB or dongle or data card which you plug into your computer?

1. Vodafone
2. O2
3. Meteor
4. 3 Ireland (also known as H3GI)
5. Tesco Mobile
6. EMobile
7. JustMobile
8. Postfone
98. Other _____ (please specify)
99. Don't Know

INTERVIEWER: SHOWCARD 7. PROBE TO PRECODES. SINGLE CODE

SCRIPTER: ASK ALL RESPONDENTS WHO ANSWER CODE 1 AT Q.12B

BASE: ALL ADULTS WHO USE A MOBILE PHONE

20a Which company provides your main mobile phone service?

INTERVIEWER: PROBE TO PRECODES. MULTICODE

SCRIPTER: ASK ALL RESPONDENTS WHO ANSWER CODE 1 AT Q.12B. (LIST SAME IN 20B AS 20A LESS OPTION MENTIONED Q20A)

BASE: ALL ADULTS WHO USE A MOBILE PHONE

20b Which other company, if any, provides your mobile phone service

1. Vodafone
2. Meteor
3. Three (also known as H3GI and O2)
4. Tesco Mobile
5. eMobile/eir
6. Lycamobile
7. ID Mobile/Carphone Warehouse
8. Virgin Mobile
9. Postfone
10. 48
98. Other _____ (please specify)
99. Don't Know
97. No other (only show at 20b only)

MOBILE PHONE SECTION

SCRIPTER: ASK ALL RESPONDENTS WHO ANSWER CODE 1 AT Q.12b

BASE: ALL ADULTS WHO USE A MOBILE PHONE

Q21 Is your main mobile plan/package a prepay package (where you buy credit before you can make a call) or bill pay package (where you have a contract with your operator and subsequently receive a bill for calls, texts or other services you used in the previous month)?

1. Prepay
2. Bill pay
3. Both (if you have more than 1 mobile phone)

INTERVIEWER: SHOWCARD 8. PROBE TO PRECODES. SINGLE CODE

SCRIPTER: ASK ALL RESPONDENTS WHO ANSWER CODE 1 AT Q.12B

BASE: ALL ADULTS WHO OWN A MOBILE PHONE

Q22 And how often do you use your main mobile phone for making/receiving calls in your home?

1. More than once a day
2. Approximately once a day
3. Approximately once every couple of days
4. Approximately once a week
5. Less frequently

INTERVIEWER: SHOWCARD 9. RESPONSES MUST ADD TO 100%

SCRIPTER: ASK ALL RESPONDENTS WHO ANSWER CODE 1 AT Q.12B. RESPONSE MUST ADD TO 100%

BASE: ALL ADULTS WHO USE A MOBILE PHONE

Q23 Thinking about the calls made from mobile phones in a typical month by all members of your home, please provide an approximate breakdown of the amount of time spent on household mobile phone(s) for each of the following?

1. To international phone numbers, including where you call international landlines from Skype -- %
2. To local/national fixed line numbers ---- %
3. To mobile phones in Ireland ---- %
4. To freephone, directory enquires ---- %
5. To competition lines, voting lines and other premium rate numbers ---- %
99. Don't Know

INTERVIEWER: SHOWCARD 10. PROBE TO LIST OF POTENTIAL OPTIONS. SINGLE CODE

SCRIPTER: ASK ALL RESPONDENTS WHO ANSWER CODE 2 OR 3 AT Q.21

BASE: ALL ADULTS WHO OWN A MOBILE PHONE ON A POSTPAY PLAN

Q24 What is the data allowance within the standard cost per month on your **MAIN** mobile phone?

1. Up to 1GB
2. 2-3 GB.
3. 4-5 GB
4. 6-10 GB
5. Unlimited
99. Don't Know

INTERVIEWER: READ OUT EACH OPTION

SCRIPTER: ASK ALL RESPONDENTS. SINGLE CODE PER OPTION (GRID QUESTION)

BASE: ALL ADULTS

Q25 Do you use any of the following Apps for Voice or Video Calls in your home from a computer, laptop, tablet, or mobile smart phone (which need internet access to work)?

Viber
Skype
WhatsApp
Facetime
Other App service for Voice/Video calls

1. Yes
2. No

INTERVIEWER: SHOWCARD 11. READ OUT EACH OPTION USED IN Q25

SCRIPTER: SINGLE CODE PER OPTION USED AT Q25

BASE: ALL ADULTS USING METHODS MENTIONED AT Q.25

Q26 You mentioned that you use (insert each response above) for voice or video calls how do you mainly make these calls?

1. At home using my broadband service
2. Out of home in a Wi-Fi hotspot
3. Using data through a WiFi connection at home
4. Using the data allowance on my mobile phone
98. Other _____ (please specify)

SCRIPTER: ASK ALL RESPONDENTS. SINGLE CODE PER OPTION

BASE: ALL ADULTS

Q27 Do you use any of the following Apps for instant messaging in your home from a computer, laptop, tablet, or mobile smart phone (i.e. over IP / Internet)?

- 1 Viber
- 2 Skype
- 3 WhatsApp
- 4 Facebook Instant messenger
- 5 Snap Chat
- 6 Other App service for instant messaging

1. Yes
2. No

INTERVIEWER: SHOWCARD 12. RECORD FOR EACH OPTION FROM Q27

SCRIPTER: SINGLE CODE PER OPTION AT Q27

BASE: ALL ADULTS USING METHODS MENTIONED AT Q.27

Q28 You mentioned that you use (insert each response above) for instant messaging how do you mainly send these messages?

1. At home using my broadband service
2. Out of home in a Wi-Fi hotspot
3. Using the data allowance on my mobile phone
4. Using data through a wifi connection at home
98. Other _____ please specify

INTERVIEWER: MULTICODE

SCRIPTER: ASK ALL RESPONDENTS WHO DO NOT USE ANY APPS MENTIONED AT Q.25.

BASE: ALL ADULTS NOT USING METHODS MENTIONED AT Q.25

Q.38 Why do you not use any of these types of app services for voice calls?

1. I prefer to call from landline
2. I prefer to call from mobile
3. Never heard of them before
4. Not very good with technology
5. Wouldn't not trust the quality of service
6. The people I want to call do not use any of these services
7. I try to limit the cost of my data use
98. Other _____ please specify

INTERVIEWER: SHOWCARD 13. PLEASE ANSWER BEARING IN MIND TOTAL MUST = 100%

SCRIPTER: ASK ALL RESPONDENTS WHO ANSWER YES TO ANY OPTION AT Q.25 AND YES AT Q.8. MAKE IT ADD TO 100%.

BASE: ALL ADULTS USING METHODS MENTIONED AT Q.25 AND YES AT Q.8

Q39 Thinking about all of the calls that you make to someone in Ireland (in percentage terms), how much do each of the following types of call account for? Please estimate if unsure.

1. Voice calls (Using Fixed Line) — — — %
2. Voice/Video calls (Using App/Internet) — — — %

INTERVIEWER: SHOWCARD 14. PLEASE ANSWER BEARING IN MIND TOTAL MUST = 100%

SCRIPTER: ASK ALL RESPONDENTS WHO ANSWER YES TO ANY OPTION AT Q.25 AND YES AT Q.8. MAKE IT ADD TO 100%.

BASE: ALL ADULTS USING METHODS MENTIONED AT Q.25 AND YES AT Q.8

Q40 Now thinking specifically about international calls that you may make, in percentage terms, how much do each of the following types of call account for in relation to international calls made? Please answer bearing in mind that the total must be 100%? Please estimate if unsure?

1. Voice calls (Using fixed line) — — — %
2. Voice/Video calls (Using App/Internet) — — — %
4. Do not make international calls

INTERVIEWER: PROBE TO PRE CODES. MULTICODES POSSIBLE TO ANY OPTION

SCRIPTER: ASK ALL RESPONDENTS WHO ANSWER YES AT Q.25 AND YES AT Q.8

BASE: ALL ADULTS USING METHODS MENTIONED AT Q.25 AND YES AT Q.8

Q41 Why do you choose to make calls over the internet or calls using data over the traditional means of making calls on a landline?

1. Improved technology has made VoIP more accessible
2. Local/National calls are too expensive on traditional landline
3. Internationals call are too expensive on traditional landline
4. Allows for group conversations
5. Prefer to be able to see the person I am speaking with
6. Clearer connection
98. Other _____ please specify

BUNDLES AND COSTS

INTERVIEWER: SINGLE CODE

SCRIPTER: ASK ALL RESPONDENTS

BASE: ALL ADULTS

Q42 I would like you to think back to when you last purchased any telecommunications services. Did you purchase more than one of these services as part of an overall price? Commonly called a 'bundle price' i.e. Multiple services bought in a bundle from the same service provider for an overall price.

1. Yes
2. No
99. Don't Know

INTERVIEWER: SHOWCARD 15. MULTICODE POSSIBLE

SCRIPTER: ASK ALL RESPONDENTS WHO ANSWER CODE 1 AT Q.42. MULTICODE POSSIBLE

BASE: ALL ADULTS WHO HAVE A BUNDLE

Q43a Which of these bundle options, if any, do you currently have in your home with the same provider?

1. Landline, TV, broadband & mobile phone
2. Landline, broadband & mobile phone
3. Landline, broadband & TV
4. Broadband & TV
5. Broadband & mobile phone
6. Broadband & landline
7. Landline & mobile
8. Landline & TV
9. Mobile & TV
10. Mobile & Broadband & TV

INTERVIEWER: SINGLE CODE

SCRIPTER: ASK ALL RESPONDENTS WHO ANSWER MORE THAN ONE CODE Q43a

BASE: ALL ADULTS WHO HAVE A BUNDLE

Q43b You mentioned that you have bundle types (insert options listed Q.43A) which one of these bundle would you rely on most within your household.

1. Landline, TV, broadband & mobile phone
2. Landline, broadband & mobile phone
3. Landline, broadband & TV
4. Broadband & TV
5. Broadband & mobile phone
6. Broadband & landline
7. Landline & mobile
8. Landline & TV
9. Mobile & TV
10. Mobile & Broadband & TV

SCRIPTER: ASK ALL RESPONDENTS WHO ANSWER Q.43A/B AND NOT SERVICE HELD Q8

BASE: ALL ADULTS WHO HAVE A BUNDLE

Q44 You mentioned that you have a bundle type which contains options you did not mention earlier in the survey. Can you confirm if you do or do not have access to these services.

1. IF YES – GO BACK Q8/Q12B/Q13CODE5/Q13/Q15 AND RECLASSIFY (SCRIPTOR)
2. IF NO – GO BACK Q43A/BAND RECLASSIFY BUNDLE TYPE (SCRIPTOR)

INTERVIEWER:

SCRIPTER: ASK ALL RESPONDENTS WHO ANSWERED SERVICE HELD Q8/Q12a/Q13/Q15 EXCLUDING BUNDLE OPTION Q43A/Q43B

BASE: ALL ADULTS WHO HAVE A BUNDLE

Q45 What other service(s), if any, do you have, that is not part of a bundle?

1. Landline
2. TV
3. Mobile Phone
4. Fixed Broadband

INTERVIEWER: READ OUT AND RECORD PRICE PER MONTH TO NEAREST EURO

SCRIPTER: INSERT BUNDLE TYPE FROM Q43A OR Q43B

BASE: ALL ADULTS WHO HAVE A BUNDLE

Q.46 How much do you pay per month for your bundle service (insert from Q.43a/b)?

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

INTERVIEWER: PROBE TO PRECODE

SCRIPTER: ASK ALL RESPONDENTS WHO ANSWER CODE 1 AT Q.42

BASE: ALL ADULTS WHO HAVE A BUNDLE

Q.47 How long ago did you subscribed to (BUNDLE TYPE Q43A).

1. Past month
2. 2-3 months
3. 4-6 months
4. Between 6 months and 12 months
5. Between 1 and 2 years
6. Between 2 and 3 years
7. Longer than 3 years
8. Don't Know

| |
|------------------------|
| COST AWARENESS SECTION |
|------------------------|

INTERVIEWER: SHOWCARD 16. PROBE TO PRECODE

SCRIPTER: ASK ALL RESPONDENTS YES AT Q8

BASE: ALL ADULTS USING FIXED LINE FOR VOICE

Q48 How often, if at all, do you consider the cost of making a call from your fixed line home phone when calling another number?

1. Very Frequently
2. Quite Frequently
3. Not that frequently
4. Not at all frequently
99. Don't Know

SCRIPTER: ASK ALL RESPONDENTS CODE 1 OR 2 Q48

BASE: ALL ADULTS USING FIXED LINE FOR VOICE WHO ARE CONCERNED ABOUT COST OF CALLS

Q49 You mentioned that you frequently think about the cost of making calls from a fixed line phone has this concern prevented you from using your fixed line in the past?

1. Yes
2. No
99. Don't Know

INTERVIEWER: RECORD AMOUNT TO NEAREST EURO

SCRIPTER: Q8 CODE 1 + Q42 CODE 2

BASE: ALL ADULTS USING FIXED LINE FOR VOICE NON BUNDLE

Q50 Approximately how much do you pay per month in total for your fixed telephone service? Please include both the call costs and line rental in the total monthly cost of your fixed telephone service.

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

INTERVIEWER: READ OUT EACH OPTION – SINGLE CODE

SCRIPTER: Q8 CODE 1 + Q42 CODE 1-2

BASE: ALL ADULTS USING FIXED LINE (Bundle or Non Bundle)

Q51 When you are thinking about the cost of your (fixed line telephone service IF Q42=2)/ (bundle insert if Q42 = 1), do you think about the cost of the line rental and calls separately?

1. No – I am more concerned with the overall cost of the (telephone package IF Q42=2)/ total bundle cost (if Q42=1)
2. Yes – I think about the line rental and calls separately
3. I don't think about costs at all

SCRIPTER: Q8 CODE 1

BASE: ALL ADULTS USING FIXED LINE

Q52 Does your fixed line home phone supplier include free phone calls and/or reduced call costs as part of your service?

1. Yes
2. No
99. Don't Know

SCRIPTER: Q82 CODE 1

BASE: ALL ADULTS USING FIXED LINE AND GETTING CALL REDUCTION

Q53 Does your service provider include free calls or discounted call costs from your fixed line phone to local fixed line phones?

1. Yes, unlimited
2. Yes, limited number of minutes
3. No free or discounted local calls are included
99. Don't Know

INTERVIEWER: SHOWCARD 17. PROBE TO PRE CODES

SCRIPTER: Q53 CODE 2

BASE: ALL ADULTS USING FIXED LINE AND GETTING LIMITED NUMBER OF DISCOUNTED MINUTES

Q54 How many minutes per month can be used within your service to make calls from your fixed line phone to other local fixed phone numbers at no extra cost?

1. Up to 30 minutes
2. Between 31 and 60 minutes
3. Between 61 and 100 minutes
4. Between 101 and 200 minutes
5. Between 201 and 300 minutes
6. More than 300 minutes
7. Unlimited
99. Don't Know

INTERVIEWER: PROBE TO ANSWER OPTIONS

SCRIPTER: Q8 CODE 1

BASE: ALL ADULTS USING FIXED LINE FOR VOICE

Q55 Could you state whether you know the cost of making calls from your fixed line phone to other local fixed line phones in instances where you need to pay for the call?

1. Know the exact cost of calls to fixed line phones
2. Know the approximate cost of calls to fixed line phones
3. Don't know or not sure of the cost of calls to fixed line phones
98. other please specify

INTERVIEWER: SINGLE CODE

SCRIPTER: Q8 CODE 1 + Q52 CODE 1

BASE: ALL ADULTS USING FIXED LINE AND RECEIVING A DISCOUNT

Q56a Does your fixed line service include free call minutes or discounted call costs to national phone numbers?

1. Yes, unlimited
2. Yes, limited number of minutes
3. No free or discounted national calls are included
99. Don't Know

INTERVIEWER: SHOWCARD 17. PROBE TO PRE CODES

SCRIPTER: Q56a CODE 1

BASE: ALL ADULTS USING FIXED LINE AND GETTING DISCOUNT ON CALLS

Q56b How many minutes per month can be used within your service to make calls from your fixed line phone to other national fixed phone numbers at no extra cost?

1. Up to 30 minutes
2. Between 31 and 60 minutes
3. Between 61 and 100 minutes
4. Between 101 and 200 minutes
5. Between 201 and 300 minutes
6. More than 300 minutes
7. Unlimited
99. Don't Know

INTERVIEWER: FOCUS ON COST OF CALLS FROM FIXED LINE TO NATIONAL FIXED LINE PHONES

SCRIPTER: Q8 CODE 1

BASE: ALL ADULTS USING FIXED LINE

Q57 Could you state whether you know the cost of making calls from your fixed line phone to national fixed line phones in instances where you need to pay for the call?

1. Know the exact cost of calls to national fixed line phones
2. Know the approximate cost of calls to national fixed line phones
3. Don't know or not sure of the cost of calls to national fixed line phones
98. Other specify

INTERVIEWER: SINGLE CODE

SCRIPTER: Q8 CODE 1 + Q52 CODE 1

BASE: ALL ADULTS USING FIXED LINE AND RECEIVING A DISCOUNT

Q58 Does your fixed line service include free call minutes or discounted call costs to mobile phone numbers?

1. Yes, to any mobile network
2. Yes, to only some mobile networks
3. No free or discounted call minutes are included
99. Don't Know

INTERVIEWER: SHOWCARD 17. PROBE TO PRE CODES

SCRIPTER: Q58 CODE 1 OR 2

BASE: ALL ADULTS USING FIXED LINE AND RECEIVING A DISCOUNT ON MOBILE CALLS

Q59 How many minutes per month can be used within your fixed line service to make calls to mobiles in Ireland at no extra cost?

1. Up to 30 minutes
2. Between 31 and 60 minutes
3. Between 61 and 100 minutes
4. Between 101 and 200 minutes
5. Between 201 and 300 minutes
6. More than 300 minutes
7. Unlimited
99. Don't Know

INTERVIEWER: FOCUS ON COST OF CALLS FROM FIXED LINE TO MOBILE PHONES

SCRIPTER: Q8 CODE 1

BASE: ALL ADULTS USING FIXED LINE

Q60 Could you state whether you know the cost of making individual calls from your fixed line phone to mobile phones (outside of any free minutes included in the service you have)?

1. Know the exact cost of calls to all mobile phone networks
2. Know the approximate cost of calls to all mobile phone networks
3. Know the exact cost of calls to some mobile networks only
4. Know the approximate cost of calls to some mobile networks only
5. Know the approximate monthly costs only
6. Don't know or not sure of the cost of calls to mobile phone numbers
7. Don't make this type of calls

SWITCHING

INTERVIEWER: SHOWCARD 18. PROBE TO PRE CODES. SINGLE CODE

SCRIPTER: Q8 CODE 1

BASE: ALL ADULTS USING FIXED LINE

Q61 How long do you have your home fixed line service with (SCRIPTER: INSERT MAIN PROVIDER MENTIONED AT Q17A)?

1. Past month
2. 2-3 months
3. 4-6 months
4. Between 6 months and 12 months
5. Between 1 and 2 years
6. Between 2 and 3 years
7. Between 3 and 5 years
8. Longer than 5 years
99. Don't Know

INTERVIEWER: PROBE TO PRE CODES

SCRIPTER: Q8 CODE 1

BASE: ALL ADULTS USING FIXED LINE

Q62 Have you switched fixed line service supplier?

1. Yes – within the last twelve months
2. Yes – between one and three years ago
3. Yes – more than three years ago
4. Never switched

INTERVIEWER: SHOWCARD 19 PROBE TO PRECODES. SINGLE CODE

SCRIPTER: Q62 CODE 1 OR 2 OR 3.

BASE: ALL ADULTS USING FIXED LINE

Q63 Which fixed line service supplier were you previously with before your current supplier?

1. Eir (Eircom)
2. Virgin Media (formerly UPC)
3. Vodafone at home
4. Imagine or Access Telecom
5. Digiweb
6. Magnet
7. IFA Telecom
8. Airspeed
9. Blueface
10. Fastcom
11. Greencom
12. Hive Telecom
13. Pure Telecom
14. Ripplecom (also called Amocom, Last Mile)
15. Satellite Broadband
16. TalkTalk
98. Other _____ (please specify)

INTERVIEWER: READ OUT EACH OPTION.

SCRIPTER: Q62 CODE 1. MULTICODE.

BASE: ALL ADULTS USING FIXED LINE SWITCHED PAST 12 MONTHS

Q64 Thinking back to the time when you switched your fixed line service provider in the past 12 months which if any of the following did you do at that time?

1. Visited fixed line service provider websites
2. Visited price comparison sites to see what suppliers had the best deals
3. Contacted previous supplier to see if they could offer you a deal
4. Visited competitor stores
5. Calculated savings that I would make from moving
6. Talk to family/friends/seek recommendations on what to do
97. None
99. Don't Know

INTERVIEWER: PROBE TO PRECODES. MULTICODE

SCRIPTER: Q62 CODE 4

BASE: ALL ADULTS NOT USING FIXED LINE SWITCHED PAST 12 MONTHS

Q65 You mentioned that you have not switched fixed line phone supplier why is this?

1. Satisfied with existing supplier
2. I don't have the time to change
3. I wouldn't know how to go about changing supplier
4. Concerned about losing service if I switch
5. Expecting better deal from current supplier
6. Savings of switching so small not worth the effort changing
7. Too inconvenient to switch
8. Other _____ please specify
97. None
99. Don't Know

INTERVIEWER: READ OUT EACH RELEVANT OPTION AND SELECT MAXIMUM OF 3
SCRIPTER: Q8 CODE 1 + Q61 CODE 1 - 6
BASE: ALL ADULTS USING FIXED LINE AND WITH CURRENT SUPPLIER PAST 3 YEARS

Q66 Thinking about when you chose your current fixed line phone service supplier, please select the top three reasons out of the following set of possible reasons which were most **important** to your decision to choose your fixed line phone service supplier. Note that all of the reasons may be relevant to your particular service supplier

[RANDOMISE SEQUENCE OF QUESTIONS]

1. Cost of the line rental
2. Cost of making calls
3. Cost of incoming calls [i.e. costs others face when others call you]
4. Better value in the bundle price offered
[IF Q42=1]
5. Better value in the service offered
[IF Q42=2]
6. Easier to have a single supplier for both or all services used
[IF Q42=1]
7. Wanted to switch to a bundle including more services (IF Q42=1)
8. Wanted to switch to a bundle with fewer services (IF Q42=1)
9. The level of customer service offered by the operator
10. The reliability of the phone service (for example fewer dropped calls)
11. The quality of the line during a call (for example how clear the other person's voice is)
12. Faster broadband with current fixed line supplier (IF ANY YES Q13 + Q42=1)
13. Trusted brand of fixed line service supplier
14. My family member/friend are with the provider meaning they were cheaper to call
15. Availability of other voice services _____ (FOR EXAMPLE CALL FORWARDING, CALL WAITING, THREE-WAY CALLING, RINGBACK, ALARM CALL, CALLER LINE RESTRICTION AND CALLER DISPLAY)]
98. Other _____ (please specify)

INTERVIEWER: READ OUT ALL OPTIONS. MULTICODE
SCRIPTER: Q66 CODE 2 OR 3
BASE: ALL ADULTS STATING COST OF CALLS AS A REASON TO JOIN CURRENT PROVIDER

Q67 You mentioned that the cost of calls was an important reason for choosing your current fixed line supplier. Please select the type of call which was of particular importance from the following list.

1. Cost of calls to the fixed line phones
2. Cost of calls to the mobile phones
3. Cost of calls to premium numbers such as competition, voting, tarot, or horoscope lines (typically beginning with 15xx)
4. Cost of calls to callsave (1850) or lo-call (1890) numbers
5. Cost of international calls
6. Cost of calls to directory enquiry services
7. No particular type of call

INTERVIEWER: SHOWCARD 20. READ OUT EACH STATEMENT. CODE PER STATEMENT REQUIRED. ALLOW DON'T KNOW
SCRIPTER: Q8 CODE 1. ALLOW DON'T KNOW
BASE: ALL ADULTS USING FIXED CALL FOR VOICE

Q68 Thinking of the following reasons why you may still have a fixed line phone in your home, please rate the following potential reasons for keeping your fixed line phone on a scale of 1 to 5 where 5 is most like your reason for keeping a fixed line phone in your home and 1 is least like the reason for keeping a fixed line phone in your home.

1. The use of a phone in cases of emergency
2. For receiving calls - Others prefer to call me on a landline
Because I need a broadband connection and the phone line is linked to it
3. The phone is linked to my burglar alarm
4. I need to have a fixed line phone at home for work reasons
5. I prefer to use my fixed line phone rather than my mobile phone when making longer calls
6. It is cheaper for making some types of calls
7. I have always had one and don't see a reason to not have one now
8. There is poor mobile phone coverage in my home – so I need a fixed line phone
9. The quality of the line during a phone call
10. It is cheaper for our household to use a single fixed line phone than multiple mobile phones

CALLING PATTERNS

INTERVIEWER: SHOWCARD 21 PROBE TO PRECODE. SINGLE CODE
SCRIPTER: ASK ALL RESPONDENTS YES AT Q.8
BASE: ALL ADULTS USING FIXED LINE FOR VOICE

Q69 How often do you use your fixed line phone for making/receiving calls?

1. More than once a day
2. Approximately once a day
3. Approximately once every couple of days
4. Approximately once a week
5. Less frequently

INTERVIEWER: READ OUT SINGLE CODE
SCRIPTER: ASK ALL RESPONDENTS YES AT Q.8
BASE: ALL ADULTS USING FIXED LINE FOR VOICE

Q70 Thinking about the calls you make and receive on your fixed line phone, which of the following best describes your usage in a typical month

1. I usually make more calls that I receive
2. I usually make and receive a similar number of calls
3. I usually receive more calls that I would make
99. Don't Know

INTERVIEWER: READ OUT EACH CALL TYPE. SINGLE CODE.
SCRIPTER: ASK ALL RESPONDENTS' YES AT Q.8
BASE: ALL ADULTS USING FIXED LINE FOR VOICE

Q71 Thinking about the categories of calls you make from your home, please select what you would primarily use for each of the following types of calls. If there are several options which you would primarily use, please select multiple options

| Type of call | Fixed line phone in your home (Q8 CODE 1) | Mobile phone (Q12 CODE 1) | [IF USING AN APP FOR ANY OF THE FOLLOWING -] INSERT OPTION(S) USED Q25 | No Preference |
|---|---|---------------------------|---|---------------|
| Calls to local fixed line phones | | | | |
| Calls to national fixed line phones | | | | |
| Calls to mobile phones on the same network as your mobile phone | | | | |
| Calls to mobile phones on a different network to your mobile phone | | | | |
| 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 | | | | |
| Calls to (callsave) 1850 or (lo-call) 1890 numbers | | | | |

INTERVIEWER: SHOWCARD 22. PROBE TO SCALE. SINGLE CODE.
SCRIPTER: ASK ALL RESPONDENTS' YES AT Q.8 + CODE 1 Q12B
BASE: ALL ADULTS USING FIXED LINE FOR VOICE + MOBILE PHONE

Q72 Would you consider cancelling your fixed line service and instead make/receiving all of your calls via your mobile phone?

1. Very likely
2. Quite likely
3. Neither likely or unlikely
4. Not very likely
5. Not at all likely
99. Don't Know

INTERVIEWER: PROBE TO PRE CODES. MULTI CODE.
SCRIPTER: Q72 CODE 1 OR 2
BASE: ALL LIKELY TO CANCEL FIXED LINE SERVICE AND USE MOBILE INSTEAD.

Q73 You mentioned you would cancel your fixed line voice subscription and make/receive all your call on your mobile why do you think this?

1. Mobile phone calls offer a better quality of service
2. Using App based service more for Voice/Video Calls (Whatsapp, Skype, Viber) that are available on my mobile
3. Using app based service more for messaging (Facebook Messenger, WhatsApp, Skype, Snap Chat) that are available on my mobile
4. This would be a good way to save money
5. I am using the landline less and less over time so I can see in a couple of years I won't use it at all
98. Other _____ specify and code

SCRIPTER: ASK ALL YES AT Q8 + CODE 1 Q12b
BASE: ALL ADULTS USING FIXED LINE FOR VOICE + MOBILE PHONE

Q74 Do you avail of a service whereby if there is no answer on your landline when called, then the call to you automatically transfers to your mobile?

1. Yes
2. No

INTERVIEWER: SHOWCARD 23. READ OUT. ANSWER MUST EQUAL 100%
SCRIPTER: ASK ALL YES AT Q8
BASE: ALL ADULTS USING FIXED LINE FOR VOICE

Q75 Thinking about the calls made from your fixed line phone in a typical month by all members of your home, please provide an approximate breakdown of the amount of time spent on the household fixed line phone for each of the following?

1. To international phone numbers, including where you call international landlines from Skype -- %
2. To local/national fixed line numbers ___%
3. To mobile phones in Ireland ___%
4. To freephone, directory enquires ___%
5. To Competition lines, voting lines and other premium rate numbers ___%
6. I Don't know

INTERVIEWER: SHOWCARD 24 PROBE TO SCALE. SINGLE CODE
SCRIPTER: ASK ALL YES AT Q8
BASE: ALL ADULTS USING FIXED LINE FOR VOICE

Q76 When you receive a call to your fixed line phone from another fixed line phone, do you know the identity of the landline provider where the call is been made from?

1. Never aware
2. Occasionally aware
3. Aware half the time*
4. Often aware
5. Always aware

INTERVIEWER: SHOWCARD 25. SINGLE CODE PER STATEMENT

SCRIPTER: ASK ALL CODE 2-5 Q76

BASE: ALL ADULTS USING FIXED VOICE WITH ANY AWARENESS OF CALLING PARTIES SERVICE NETWORK

Q77 When you receive a call to your landline from a landline who is on a different network which of the following actions are you likely to take in this situation?

| READ OUT AND ROTATE OPTIONS BELOW | Almost always or always | Often - Around three quarters of the time | Approximately half the time | Approximately a quarter of the time | Occasionally - less than a quarter of the time | Never |
|--|-------------------------|---|-----------------------------|-------------------------------------|--|-------|
| Answer their call but shorten the length of the call | | | | | | |
| Call them back to save money | | | | | | |
| Don't answer the call at all | | | | | | |
| Don't answer their call but phone them back from your fixed line phone | | | | | | |
| Don't answer their call but phone them back from your mobile phone | | | | | | |
| Don't answer their call but use some other method to contact them such as email, skype or a text message | | | | | | |

INTERVIEWER: SHOWCARD 24. PROBE TO SCALE

SCRIPTER: ASK ALL YES Q8

BASE: ALL ADULTS USING FIXED VOICE

Q78 If someone is calling you on your fixed line phone from a mobile phone, to what extent do you know what mobile network they are calling from?

1. Never aware
2. Occasionally aware
3. Aware half the time*
4. Often aware
5. Always aware

INTERVIEWER: SHOWCARD 25. READ OUT EACH STATEMENT. SINGLE CODE PER STATEMENT

SCRIPTER: CODE 2-5 Q78

BASE: ALL ADULTS USING FIXED VOICE AND ANY AWARENESS OF INCOMING MOBILE NETWORK PROVIDER

Q79 When you receive a call to your landline from a mobile and you are aware which mobile network the caller is calling from which of the following actions are you likely to take in this situation...?

| Read out and rotate statements below | Almost always or always | Often - Around three quarters of the time | Approximately half the time | Approximately a quarter of the time | Occasionally - less than a quarter of the time | Never |
|--|-------------------------|---|-----------------------------|-------------------------------------|--|-------|
| Answer their call but shorten the length of the call | | | | | | |
| Call them back to save money | | | | | | |
| Don't answer the call at all | | | | | | |
| Don't answer their call but phone them back from your fixed line phone | | | | | | |
| Don't answer their call but phone them back from your mobile phone | | | | | | |
| Don't answer their call but use some other method to contact them such as email, skype or a text message | | | | | | |

I now want to ask you some questions about possible changes in the costs of your home phone service and how you might react to these price changes. These are not necessarily changes that are planned by your, or any other, fixed line phone supplier - however we are interested in your reactions to them if they were to be hypothetically implemented.

INTERVIEWER: SHOWCARD 27.

SCRIPTER: Q8 CODE 1 + Q42 CODE 3

BASE: ALL ADULTS USING FIXED LINE VOICE + NON BUNDLE

Q85 Imagine if the cost of a phone call from your landline to other landlines on a different network/different landline provider to you increased by **1 cent per minute**.

As a consequence of this **1 cent per minute** increase in the cost of calls from your landline to landlines on a different network, do you believe that you would change your behaviour (including cancelling your bill or potentially switching to an alternative supplier)?

1. YES – definitely would change behaviour
2. MAYBE – might change behaviour
3. NO

INTERVIEWER: SINGLE CODE. **DO NOT READ OUT.**

SCRIPTER: Q85 CODE 1 OR 2

BASE: ALL ADULTS LIKELY TO CHANGE BEHAVIOUR

Q86 Which of the following would describe what you would be most likely to do?

1. I would do nothing
2. I would cancel my subscription with my fixed supplier
3. I would keep my subscription but make fewer calls on my home phone
4. I would do something else _____ [PLEASE SPECIFY]

INTERVIEWER: SINGLE CODE

SCRIPTER: Q86 CODE 2

BASE: ALL ADULTS LIKELY TO CANCEL SERVICE BASED ON INCREASE IN COST

Q87 You have just said that you would cancel your subscription, what would you do instead?

1. I would cancel my fixed line connection and use my mobile phone instead
2. Cancel and switch to a supplier offering VoIP service (SKYPE, Viber for voice or messaging)
3. Give up my fixed line connection and instead use my mobile phone for calls and a mobile broadband/data card for internet
4. I would do something else _____ [PLEASE SPECIFY]

INTERVIEWER: SHOWCARD 28. SELECT ALL THAT APPLY

SCRIPTER: Q85 CODE 2 OR 3

BASE: ALL ADULTS LIKELY TO CANCEL OR REDUCE CALLS

Q88 Which of the following would you do instead when you need to communicate with other people while at home?

1. I would make more calls on my mobile
2. I would send more texts on my mobile
3. I would use my mobile phone more for both calls and texts
4. I would send more emails or use the internet more often for social networking messaging (such as Facebook) or instant messaging
5. I would make voice or video calls more often using Apps such as Skype, Viber, Facetime and WhatsApp.
6. I would send more emails or a (call-me) text messages asking the person I'm contacting to call me back
7. I would make less calls on my landline and not replace them with other forms of communication
8. I would make more calls from a landline/fixed line in work
9. I would make no changes
10. I would do something else _____ [PLEASE SPECIFY]

INTERVIEWER: SHOWCARD 29. RECORD FOR EACH OPTION YES AT Q88

SCRIPTER: ANY YES CODE Q88 1-8

BASE: ALL ADULTS CHANGING COMMUNICATION

Q89 How often would you [INSERT EACH STATEMENT SELECTED IN Q88]

1. Never
2. Occasionally - less than a quarter of the time
3. Approximately a quarter of the time
4. Approximately half the time
5. Often - Around three quarters of the time
6. Almost always or always

INTERVIEWER: SHOWCARD 27 AGAIN. NOTE SAME STYLE OF QUESTION FROM Q85-89 BUT BASED ON INCREASE OF 1c TO MOBILES.

SCRIPTER: Q8 CODE 1 + Q42 CODE 2

BASE: ALL ADULTS USING FIXED LINE VOICE = NON BUNDLE

Q90 Imagine if the cost of a phone call from your landline to mobile phones increased by **1 cent per minute**.

As a consequence of this **1 cent per minute** increase in the cost of calls to mobiles, do you believe that you would change your behaviour (including cancelling your bill or potentially switching to an alternative supplier)?

1. YES – definitely would change behaviour
2. MAYBE – might change behaviour
3. NO

INTERVIEWER: SINGLE CODE. DO NOT READ OUT.

SCRIPTER: Q90 CODE 1 OR 2

BASE: ALL ADULTS LIKELY TO CHANGE BEHAVIOUR

Q91 Which of the following would describe what you would be most likely to do?

1. I would do nothing
2. I would cancel my subscription with my fixed supplier
3. I would keep my subscription but make fewer calls on my home phone
4. I would do something else _____ [PLEASE SPECIFY]

INTERVIEWER: SINGLE CODE

SCRIPTER: Q91 CODE 2

BASE: ALL ADULTS LIKELY TO CANCEL SERVICE BASED ON INCREASE IN COST

Q92 You have just said that you would cancel your subscription, what would you do instead?

1. I would cancel my fixed line connection and use my mobile phone instead
2. Cancel and switch to a supplier offering VoIP service (SKYPE, Viber for voice or messaging)
3. Give up my fixed line connection and instead use my mobile phone for calls and a mobile broadband/data card for internet
4. I would do something else _____ [PLEASE SPECIFY]

INTERVIEWER: SHOWCARD 28 AGAIN. SELECT ALL THAT APPLY

SCRIPTER: Q93 CODE 2-3

BASE: ALL ADULTS LIKELY TO CANCEL OR REDUCE CALLS

Q93 Which of the following would you do instead when you need to communicate with other people while at home? Select all that apply.

1. I would make more calls on my mobile
2. I would send more texts on my mobile
3. I would use my mobile phone more for both calls and texts
4. I would send more emails or use the internet more often for social networking messaging (such as Facebook) or instant messaging
5. I would make voice or video calls more often using Apps such as Skype, Viber, Facetime and WhatsApp.
6. I would send more emails or a (call-me) text messages asking the person I'm contacting to call me back
7. I would make less calls on my landline and not replace them with other forms of communication
8. I would make more calls from a landline/fixed line in work
9. I would make no changes
10. I would do something else _____ [PLEASE SPECIFY]

INTERVIEWER: SELECT ALL THAT APPLY

SCRIPTER: Q93 CODE 1 OR 3 OR Q88 CODE 1 OR 3

BASE: ALL ADULTS LIKELY TO USE MOBILE MORE AS RESULTS OF INCREASE IN FIXED LINE

Q94 If the cost of mobile to mobile calls also goes up by 1c per minute would this encourage you to use any of the following options.

1. I would use email or use the internet for social networking messaging (such as Facebook) or instant messaging instead
2. I would use Skype, internet calls or VoIP from a computer, tablet, or mobile smart phone instead
3. I would send an email or a (call-me) text message asking the recipient to phone me instead
4. I would make no changes
5. I would do something else _____ [PLEASE SPECIFY]

INTERVIEWER: SHOWCARD 29 AGAIN. RECORD FOR EACH OPTION YES AT Q93

SCRIPTER: ANY YES CODE Q93 1-8

BASE: ALL ADULTS CHANGING COMMUNICATION

Q95 How often would you [INSERT EACH STATEMENT SELECTED IN ABOVE Q93, STATEMENTS 1-8]

1. Never
2. Occasionally - less than a quarter of the time
3. Approximately a quarter of the time
4. Approximately half the time
5. Often - Around three quarters of the time
6. Almost always or always

INTERVIEWER: SHOWCARD 27

SCRIPTER: Q8 CODE 1 + Q42 CODE 1

BASE: ALL ADULTS USING FIXED LINE VOICE + BUNDLE

- Q96 Imagine if the cost of calls in your bundle from your landline to other landlines on a different network/different landline provider to you increased by 1 cent per minute, do you believe that you would change your behaviour (including cancelling your bill or potentially switching to an alternative provider).
1. YES – definitely would change behaviour
 2. MAYBE – might change behaviour
 3. NO

INTERVIEWER: SINGLE CODE DO NOT READ OUT.

SCRIPTER: Q96 CODE 1 OR 2

BASE: ALL ADULTS LIKELY TO CHANGE BEHAVIOUR

- Q97 Which of the following would describe what you would be most likely to do?
1. I would do nothing
 2. I would cancel my subscription with my fixed supplier
 3. I would keep my current supplier but downgrade to a cheaper bundle
 4. I would do something else _____ [PLEASE SPECIFY]

INTERVIEWER: SINGLE CODE

SCRIPTER: Q97 CODE 2

BASE: ALL ADULTS LIKELY TO CANCEL SERVICE BASED ON INCREASE IN COST

- Q98 You have just said that you would cancel your subscription, what would you be likely to do instead?
1. Switch to a supplier offering VoIP service (SKYPE, Viber for voice or messaging)
 2. Give up my fixed line connection and use my mobile phone instead
 3. Give up my fixed line connection and instead use my mobile phone for calls and a mobile broadband/data card for internet
 4. I would do something else _____ [PLEASE SPECIFY]

INTERVIEWER: SELECT ALL THAT APPLY

SCRIPTER: Q97 CODE 2 OR 3

BASE: ALL ADULTS LIKELY TO CANCEL OR REDUCE CALLS

- Q99 How would you change how you purchase the services from your current supplier?
1. I would downgrade to a cheaper bundle that still includes a fixed line phone service
 2. I would downgrade to a basic fixed line phone service (cancelling the additional bundled services i.e. pay TV and broadband)
 3. I would downgrade to a basic fixed line phone service and then purchase the previously bundled services (i.e. pay TV and broadband) from an different supplier
 4. I would keep my internet service but drop the call service and use VoIP for calls and messaging (SKYPE, Viber or similar service for calls)
 5. I would keep my current bundle and reduce my out of bundle' spending on calls to bring the total bill down closer to the base bundle cost
 6. I would do something else _____ [PLEASE SPECIFY]

INTERVIEWER: SHOWCARD 28, MULTICODE POSSIBLE

SCRIPTER: ANY YES CODE 2 OR 3 Q98

BASE: ALL ADULTS CHANGING COMMUNICATION

- Q100 Which of the following would you do instead when you need to communicate with other people while at home?
1. I would make more calls on my mobile
 2. I would send more texts on my mobile
 3. I would use my mobile phone more for both calls and texts
 4. I would send more emails or use the internet more often for social networking messaging (such as Facebook) or instant messaging
 5. I would make voice or video calls more often using Apps such as Skype, Viber, Facetime and WhatsApp.
 6. I would send more emails or a (call-me) text messages asking the person I'm contacting to call me back
 7. I would make less calls on my landline and not replace them with other forms of communication
 8. I would make more calls from a landline/fixed line in work
 9. I would make no changes
 10. I would do something else _____ [PLEASE SPECIFY]

INTERVIEWER: SHOWCARD 29, RECORD FOR EACH OPTION YES AT Q100

SCRIPTER: ANY YES CODE Q100 1-8

BASE: ALL ADULTS CHANGING COMMUNICATION

- Q101 How often would you [INSERT EACH STATEMENT SELECTED IN Q100, STATEMENTS 1 TO 8]
1. Never
 2. Occasionally - less than a quarter of the time
 3. Approximately a quarter of the time
 4. Approximately half the time
 5. Often - Around three quarters of the time
 6. Almost always or always

INTERVIEWER: SHOWCARD 27

SCRIPTER: Q8 CODE 1 + Q42 CODE 1

BASE: ALL ADULTS USING FIXED LINE VOICE + BUNDLE

- Q102 Imagine if the cost of calls in your bundle from your landline to mobile phone increased by 1 cent per minute, do you believe that you would change your behaviour (including cancelling your bill or potentially switching to an alternative provider).
1. YES – definitely would change behaviour
 2. MAYBE – might change behaviour
 3. NO

INTERVIEWER: SHOWCARD 29.RECORD FOR EACH OPTION YES AT Q106
SCRIPTER: ANY YES CODE Q106 1-8
BASE: ALL ADULTS CHANGING COMMUNICATION

Q108How often would you [INSERT EACH STATEMENT SELECTED IN Q106, STATEMENTS 1 TO 8]

1. Never
2. Occasionally - less than a quarter of the time
3. Approximately a quarter of the time
4. Approximately half the time
5. Often - Around three quarters of the time
6. Almost always or always

Q.C13

Do you have you any further comments in relation to this survey?

In order to ensure interviews are carried out in accordance with industry standards Red C are obligated to randomly quality control a certain percentage of the interviews we conduct for our client. Therefore I would really appreciate if you could provide me with your name, telephone number and address for this purpose only and if contacted it would only take a few minutes of your time. Your personal details would remain confidential and not used for any other purpose.

Name:
 Telephone number:
 Address:

The survey you completed today was conducted via the market research code of conduct and on behalf of the Communications Regulator who regulates telecommunications services, including voice, broadband and postal services.

Many thanks for your participation in this survey

INTERVIEWER PLEASE NOW CODE SOCIAL CLASS BEFORE EXITING SYSTEM

**THANK
YOU**

REDC



ComReg Business FVCT Market Research

August 2016 - 165716



REDC

Objectives & Methodology



- / ComReg is required to review certain electronic communications markets that are susceptible to ex-ante regulation, as set out by the European Commission ('EC'). The Fixed Voice Call Termination ('FVCT') Market is one of five wholesale markets that the EC has identified as being susceptible to ex-ante regulation.

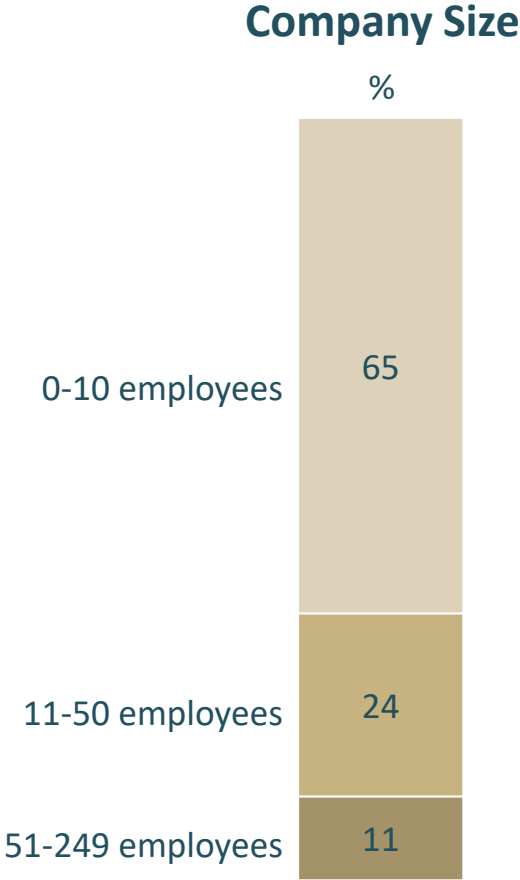
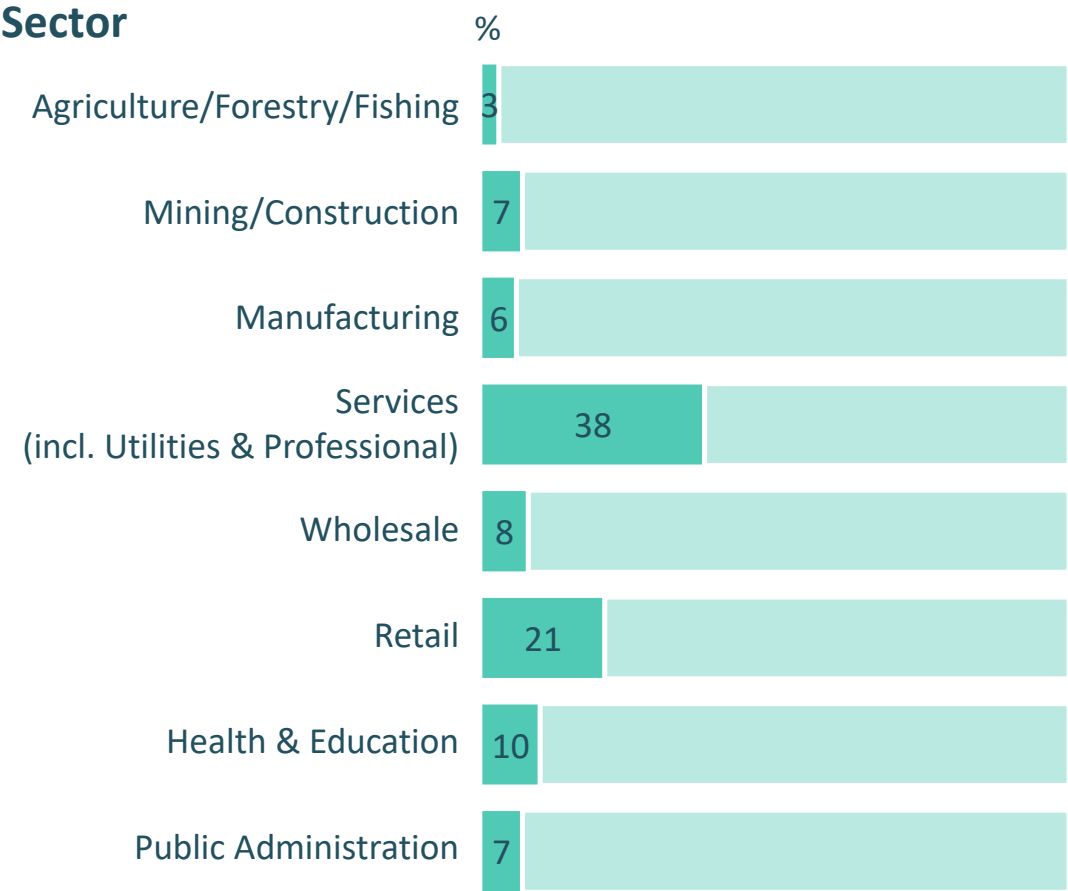
- / In order to assist with its market review of FVCT, ComReg has engaged REDC to carry out market research in order to gain insights into business characteristics, including:
 - Incidence of ownership and usage of fixed voice telephony amongst SMEs
 - SME Usage of mobile phone for traditional calls, texts (SMS) and emails
 - SME Usage of Applications ('Apps') for voice/messaging
 - SME Usage of Voice-over-IP ('VOIP')
 - Incidence of bundling telecommunications services amongst SMEs
 - Price awareness of voice calls and switching behaviour of SMEs

- / 500 telephone interviews were conducted by RED C amongst a representative sample of Irish SME'S (0-250 Employees) in July 2016.

- / Interviews were quota controlled by industry sector and employee size and weighted by these variables to produce a representative sample of SME's.

Sample Profile

(Base: All SMEs- 500)



Sample is representative of all SME's in Ireland by sector and company size



(AOS)

Contents

Slide No.

| | |
|--------------------------------|-----|
| / Infographics of Key Findings | 5 |
| / Service Ownership | 12 |
| / Service Providers | 21 |
| / Calling Patterns | 32 |
| / Bundles | 37 |
| / Cost Awareness | 41 |
| / Switching | 60 |
| / Non-Fixed Line Business | 73 |
| / SSNIP Section | 78 |
| / Questionnaire | 101 |

Statistical Testing has been conducted in the survey where a significant difference exists at the 95% confidence interval the following notation is used



REDC



Key Findings

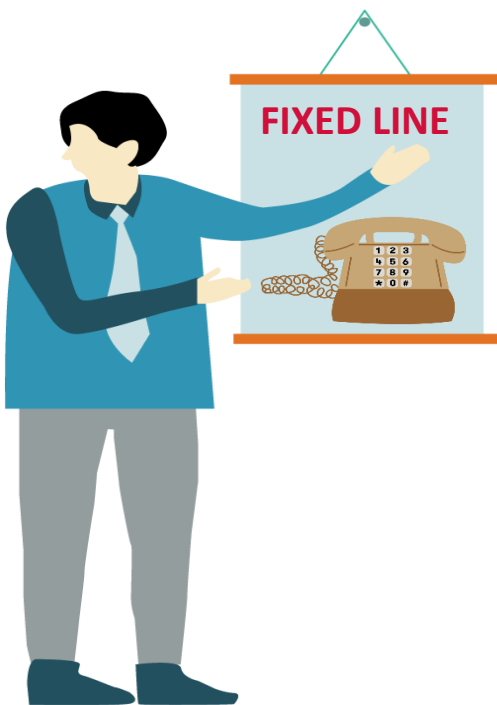
Key Findings – Market Analysis FVCT Business 2016

Based on responses to this Business Survey:

- / 89% of SME's in Ireland have an active fixed line phone for making and receiving calls. 20% report to use Apps for voice calls while 19% use VoIP services.
- / 86% of SME's use broadband and/or mobile data for their business – highest for the wholesale sector (92%) and lowest for Agriculture/Forestry/Fishing (62%)
- / 78% of businesses use mobile phones for business purposes. On average 47% of these business provide their employees with a business mobile phone.
- / 53% of businesses with a fixed voice service identify eir as being their supplier
- / 41% of businesses with a broadband service identify eir as being their supplier.
- / 55% bundle telecommunications services.
The most popular bundle type is Landline and Broadband Bundle (85%).
- / The average length of a fixed line contract is 1 year and 3 months. 42% have previously switched.
- / The main reasons for switching fixed line supplier are: Cost (23%) and trust in new supplier brand (18%).
- / 11% of business do not have a fixed line used for voice. 37% of these businesses previously had an active fixed line. Cost is the main reason for ceasing fixed voice service.



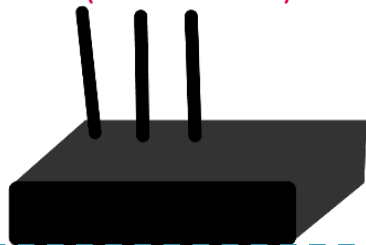
Communication Services Used by Business



89%

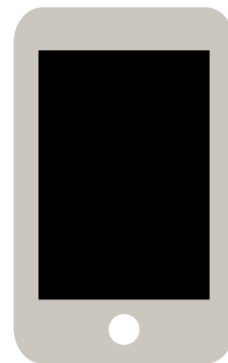
Of businesses surveyed have an active fixed phone line (i.e. line rental) used for voice/data traffic (Ref: Slide 13)

86%
Of Irish SME's surveyed purchase and use broadband/ for their business (Ref: Slide 16)



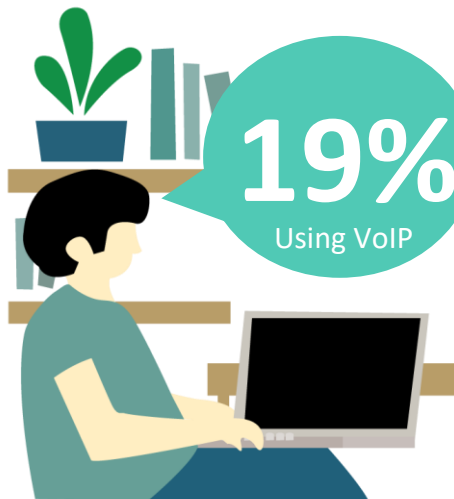
78%

Of SME's surveyed use mobile phone for business purposes (Ref: Slide 16)



20%

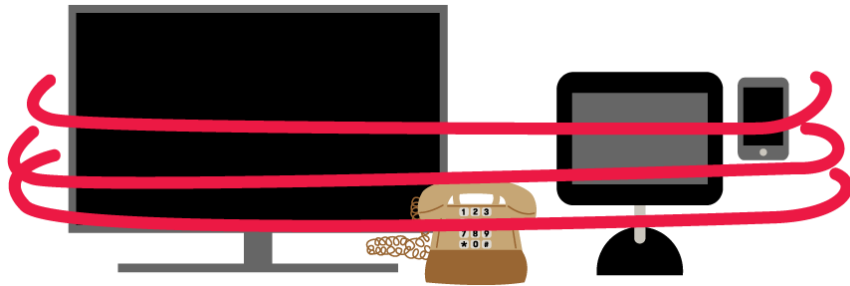
Businesses Surveyed Using Over-the-Top ('OTT') Apps for voice (Ref: Slide 16)



Businesses Surveyed VoIP (e.g. SIP trunk) (Ref: Slide 16)

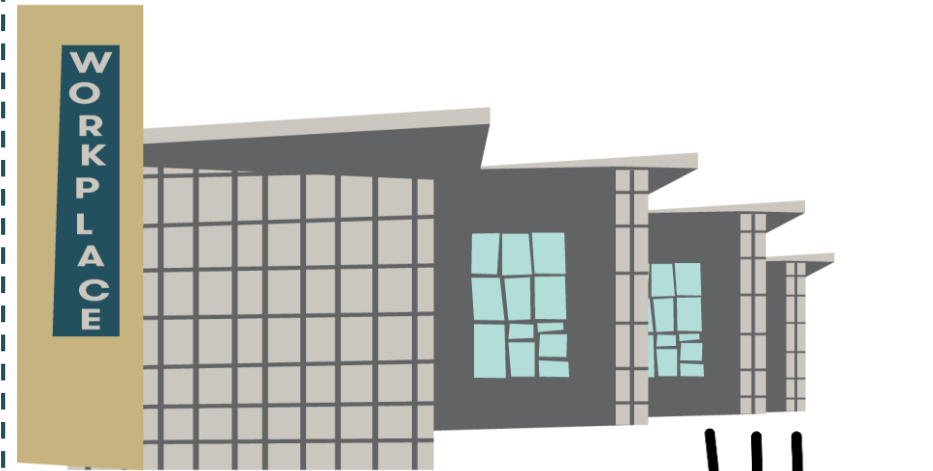
REDC

Bundling of Telecommunications

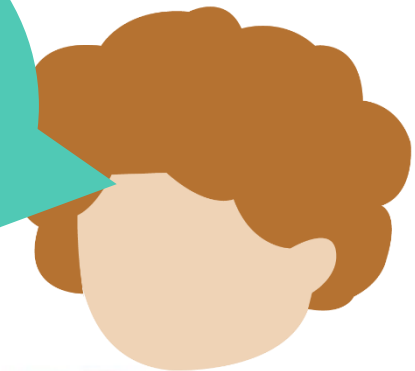


55%

Of SMEs with a fixed line voice service bundle this service with other telecommunications services service (Ref: Slide 37)



Among Fixed Voice Bundle holders the most Popular component of Bundle is Fixed Broadband(85%)
Ref: Slide 38



REDC

Spend

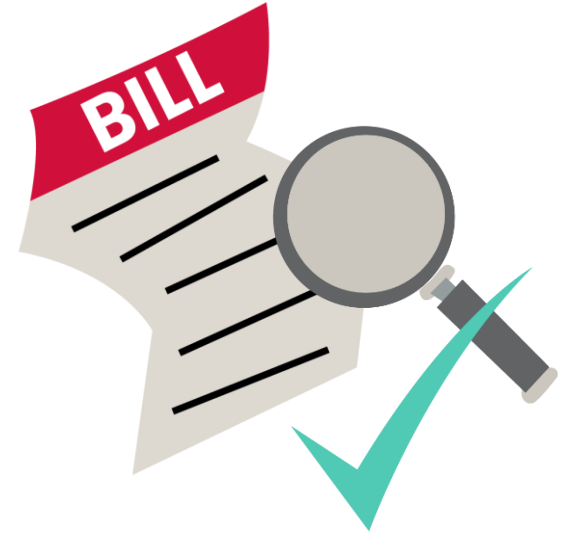


The average spend per month on fixed line calls and line rental by Irish SME's surveyed (Ref: Slide 42)



10%

Of SME's surveyed in a contract receive a discount relating to a minimum level of spend (REF: Slide 44)



65%

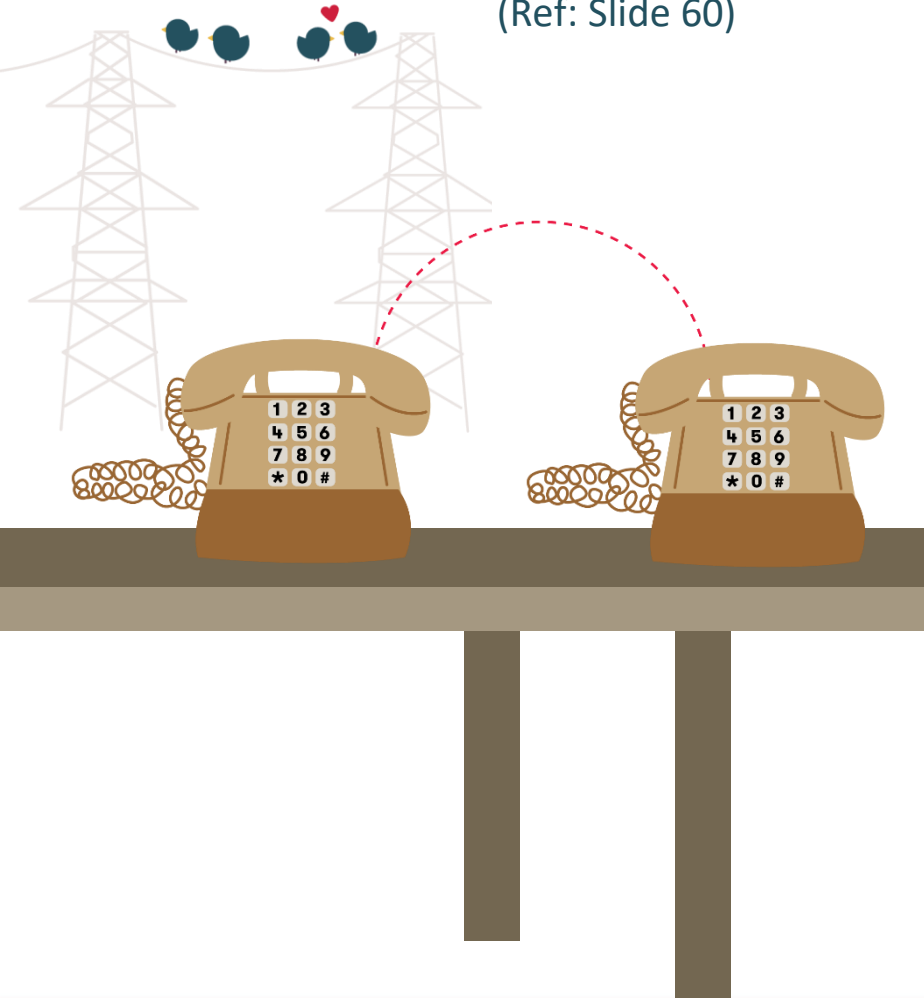
Of Irish SME's surveyed check the fixed line phone bills they receive (Ref: Slide 56)

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Switching

43%

Of business surveyed have previously switched fixed line service supplier (Ref: Slide 60)



23%

 of SMEs surveyed chose current fixed provider based on cost of calls (Ref Slide 66)

18%

 of SMEs surveyed chose fixed provider as they trust the brand (Ref: Slide 66)

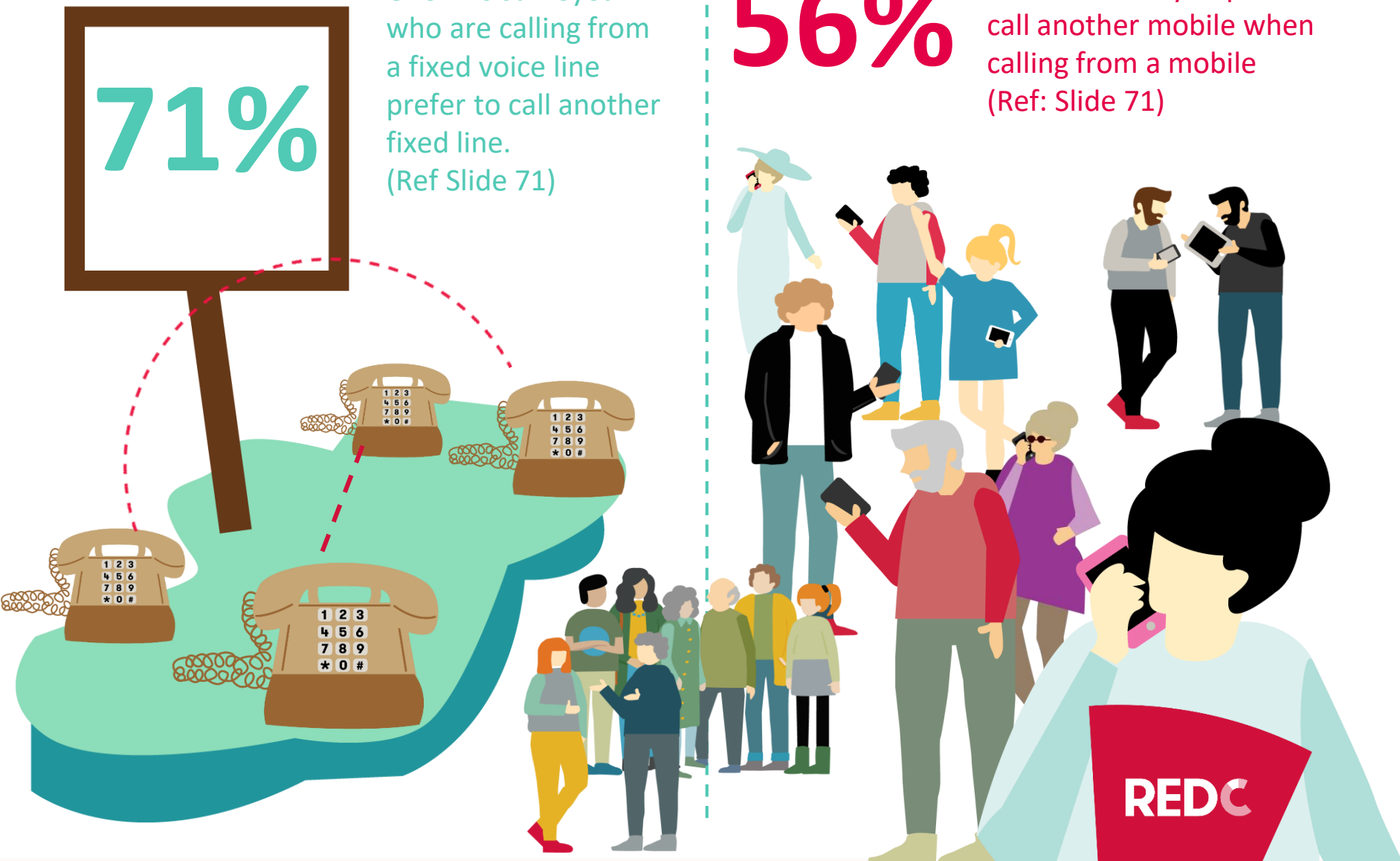
Calling Pattern

71%

Of SMEs surveyed who are calling from a fixed voice line prefer to call another fixed line.
(Ref Slide 71)

56%

Of SMEs surveyed prefer to call another mobile when calling from a mobile
(Ref: Slide 71)

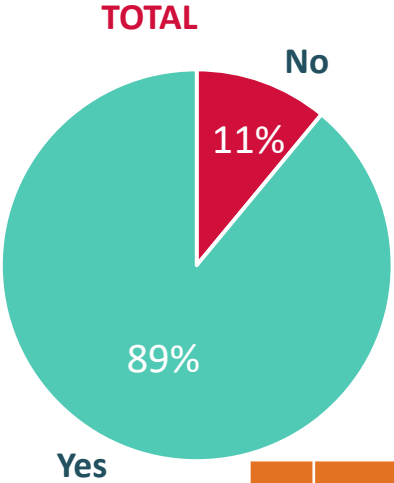




Service Ownership

Incidence of Having Active Fixed Line Phone Connection Used For Voice or Data Traffic (Base: All SMEs; n=500)

Q. Does your business have a fixed line phone connection that is actively used for either voice or data traffic?



| | Company Size | | |
|-----|-----------------|----------------|-----------------|
| | 0 - 10 (323) | 11-50 (121) | 51-249 (56*) |
| Yes | 86% | 92% | 97% |
| No | 14% | 8% | 3% |

| | Sector | | | | | | | |
|-----|--|----------------------------------|------------------------|-------------------|--------------------|-----------------|-------------------------------|-----------------------------------|
| | Agri/ Forestry/ Fishing (13*) | Mining/ Construction (37*) | Manufacturing (30*) | Services (190) | Wholesale (40*) | Retail (105) | Health & Education (51) | Public Administration (34*) |
| Yes | 74% | 76% | 92% | 89% | 96% | 92% | 90% | 89% |
| No | 26% | 24% | 8% | 11% | 4% | 8% | 10% | 11% |

*Note: Small Base Size

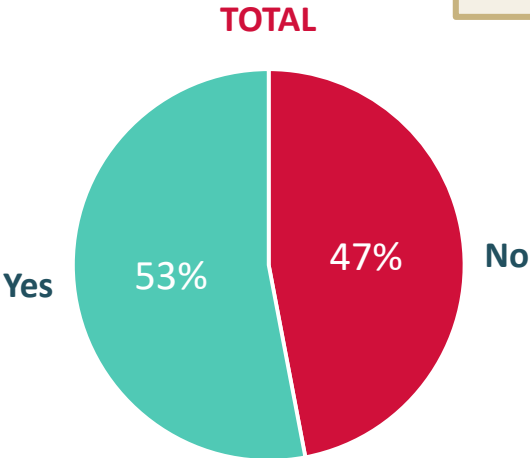
89% of surveyed SMEs have fixed line services (i.e. line rental for voice or broadband). The incidence of having a fixed line phone connection increases as the company size increases.



Incidence of Having More Than One Fixed Line Phone Connection

(Base: All SMEs With Fixed Line Phone Connection, n=445)

Q. In your business, do you have more than 1 fixed line phone connection?



| | Company Size | | |
|-----|-----------------|----------------|-----------------|
| | 0 - 10 (263) | 11-50 (110) | 51-249 (58*) |
| Yes | 38% | 74% | 82% |
| No | 62% | 26% | 18% |

| | Sector | | | | | | | |
|-----|---------------------------------------|----------------------------------|------------------------|-------------------|--------------------|-----------------|--------------------------------|-----------------------------------|
| | Agri/ Forestry/ Fishing (8*) | Mining/ Construction (23*) | Manufacturing (27*) | Services (165) | Wholesale (38*) | Retail (91*) | Health & Education (45*) | Public Administration (32*) |
| Yes | 13% | 31% | 52% | 46% | 67% | 49% | 73% | 78% |
| No | 87% | 69% | 48% | 54% | 33% | 51% | 27% | 22% |

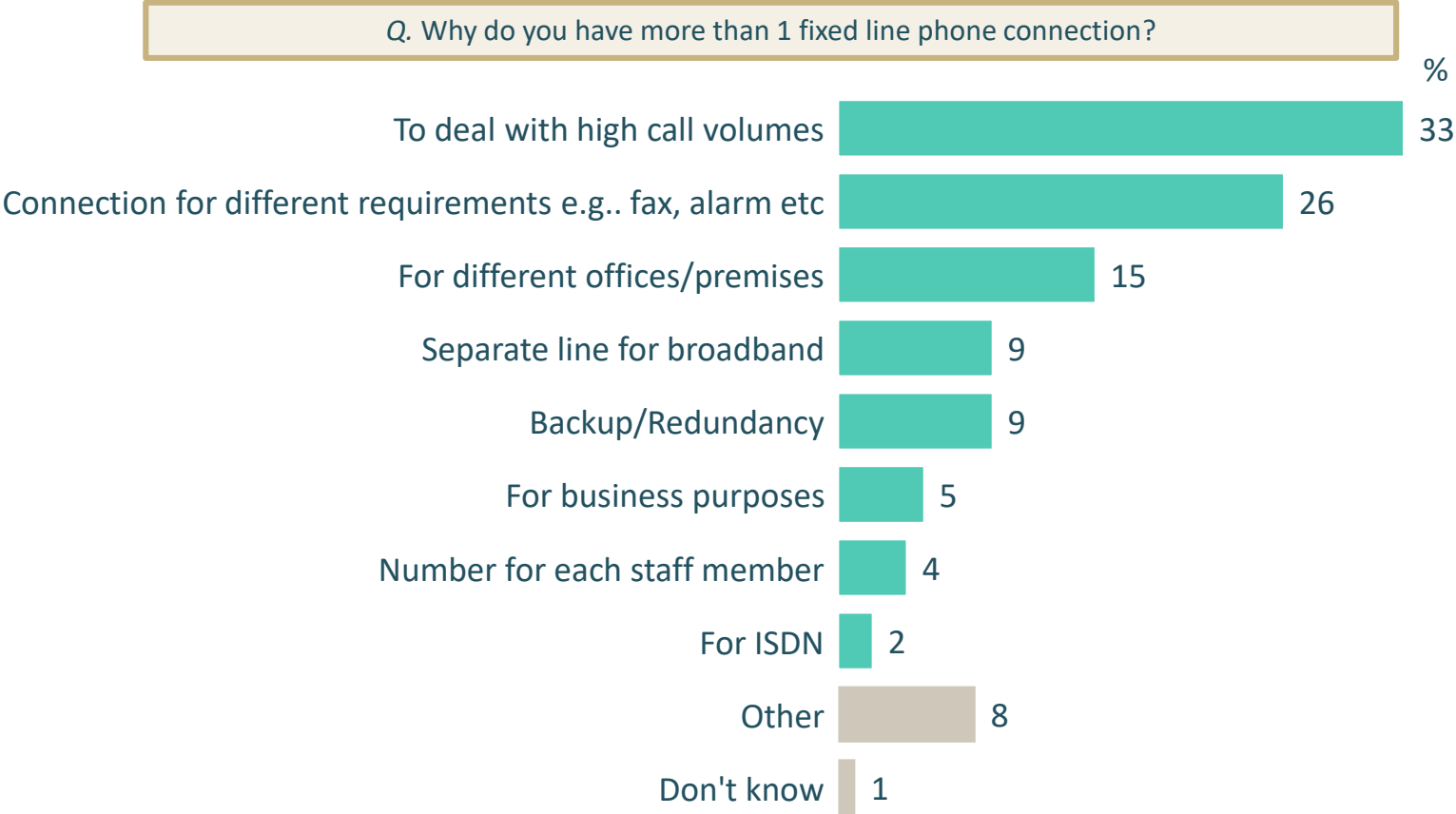
*Note: Small Base Size

Of those SMEs in the survey with fixed line phone connections, 53% have more than one fixed line phone connection. Larger companies are more likely to have more than one fixed line phone connection.



Reason For Having More Than One Fixed Line Phone Connection

(Base: All SMEs With More Than One Fixed Line Phone Connection, n=235)



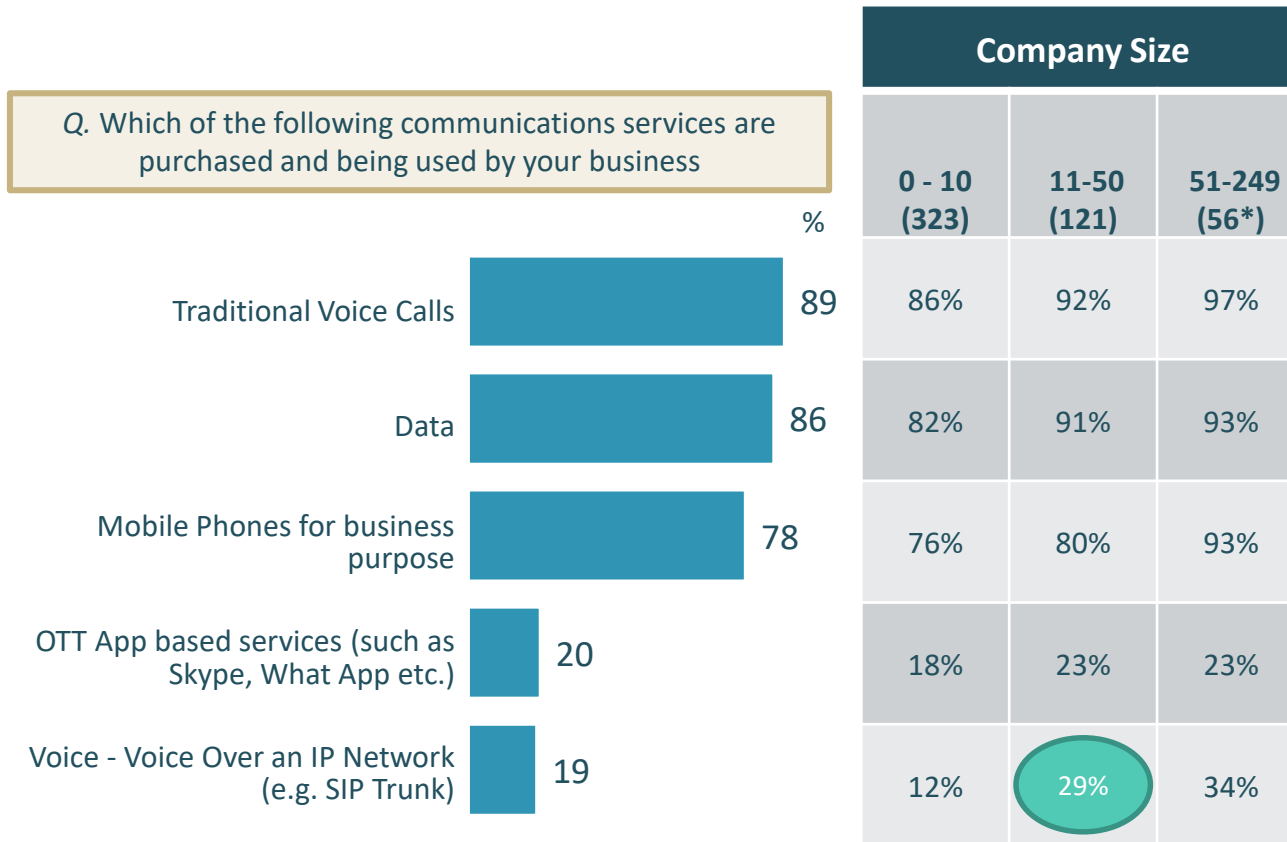
(Results add to more than 100% as businesses were allowed selected multiple responses)

Of the SMEs in the survey who report having more than one fixed line phone connection, 33% say the extra connection is needed to deal with high volume of calls – the extra connections are used to cover different offices/premises.



Types of Communication Services Purchased & Used By Irish SME's

(Base: All SMEs; n=500)



*Note: Small Base Size

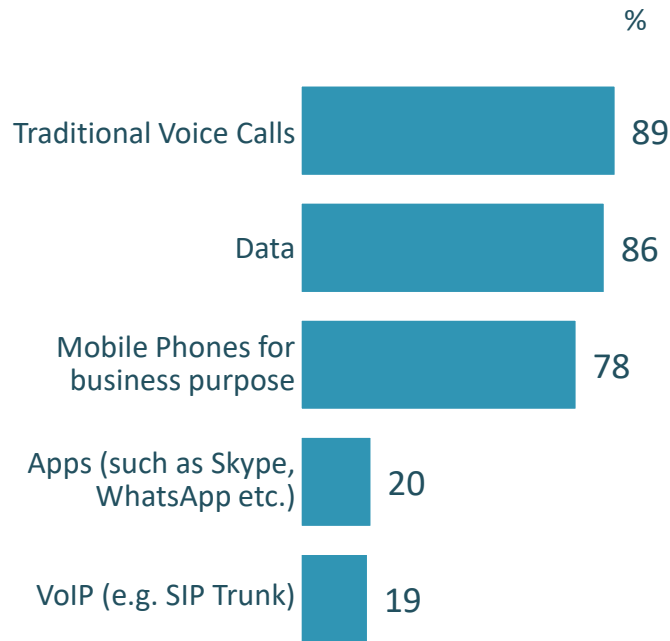
89% of the SMEs surveyed purchase and use traditional voice call services, 86% purchase and use broadband/data services.



Types of Communication Services Purchased & Used By Irish SME's

(Base: All SMEs; n=500)

Q. Which of the following communications services are purchased and being used by your business



| | Sector | | | | | | | |
|-------------------------------------|--|----------------------------------|------------------------|-------------------|--------------------|-----------------|--------------------------------|--------------------------|
| | Agri/ Forestry/ Fishing (13*) | Mining/ Construction (37*) | Manufacturing (30*) | Services (190) | Wholesale (40*) | Retail (105) | Health & Education (51*) | Public Admin (34*) |
| Traditional Voice Calls | 74% | 76% | 92% | 89% | 96% | 92% | 90% | 89% |
| Data | 62% | 89% | 91% | 86% | 92% | 83% | 86% | 82% |
| Mobile Phones for business purpose | 89% | 91% | 88% | 77% | 84% | 69% | 78% | 84% |
| Apps (such as Skype, WhatsApp etc.) | 34% | 10% | 27% | 21% | 24% | 13% | 20% | 29% |
| VoIP (e.g. SIP Trunk) | 16% | 3% | 17% | 19% | 20% | 22% | 17% | 30% |

*Note: Small Base Size

Approximately 1 in 5 SME's in the survey are using Apps for communicating and a similar number are using VoIP

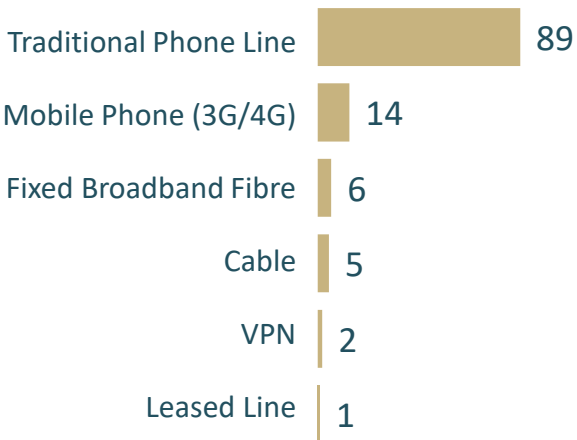
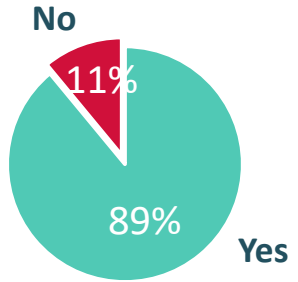


Means Of Accessing Services (Traditional Voice/Broadband Data)

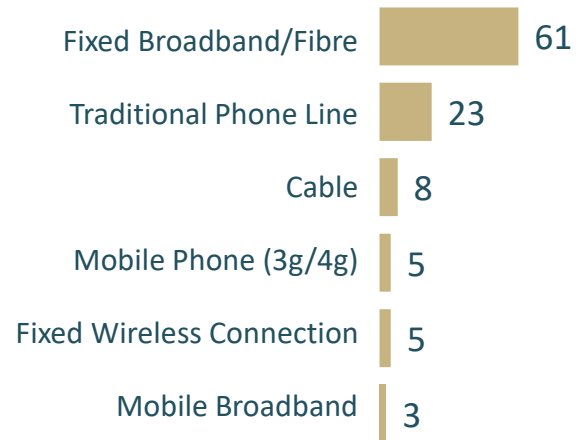
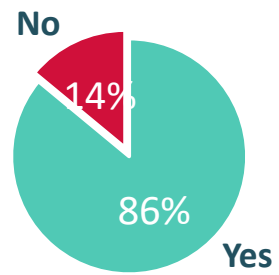
(Base: All SMEs; n=500)

Q. In your business which means of accessing (SERVICE TYPE) are used

Voice/Traditional Spoken
(n=445)



Broadband/Data
(n=428)



(Responses below 3% not shown in chart)

11% of SMEs surveyed do not purchase or use a fixed line phone for making or receiving voice calls.

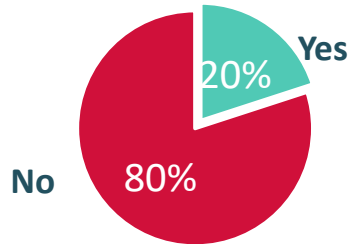


Means Of Accessing Services (OTT Apps /Voice Over IP Network)

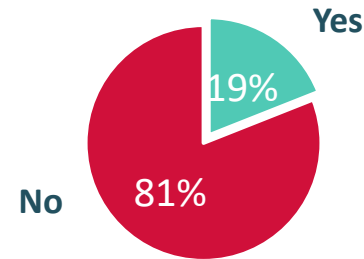
(Base: All SMEs; n=500)

Q. In your business which means of accessing (SERVICE TYPE) are used

**OTT Apps
(Skye/What's app)
(n=100)**



**Voice over IP (e.g. SIP Trunk)
(n=94)**



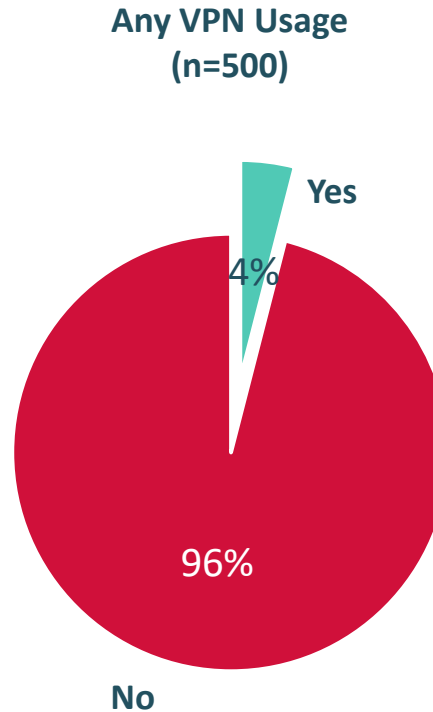
51% of SME's with OTT App access the service by Fibre Broadband, while 18% access via mobile phone

20% of SME's in the survey access voice using OTT internet apps with 51% of these accessing this service via a fibre broadband connection.

Underlying Technology Used to Provide VPN.

(Base: All SMEs n=500)

Q. You mention that your **company is being provided with a VPN**. VPNs can be delivered over a variety of business connectivity services. Do you know what the **underlying access technology** or infrastructure is used to provide your VPN?



4% of all SME's in the survey report to accessing VPN.

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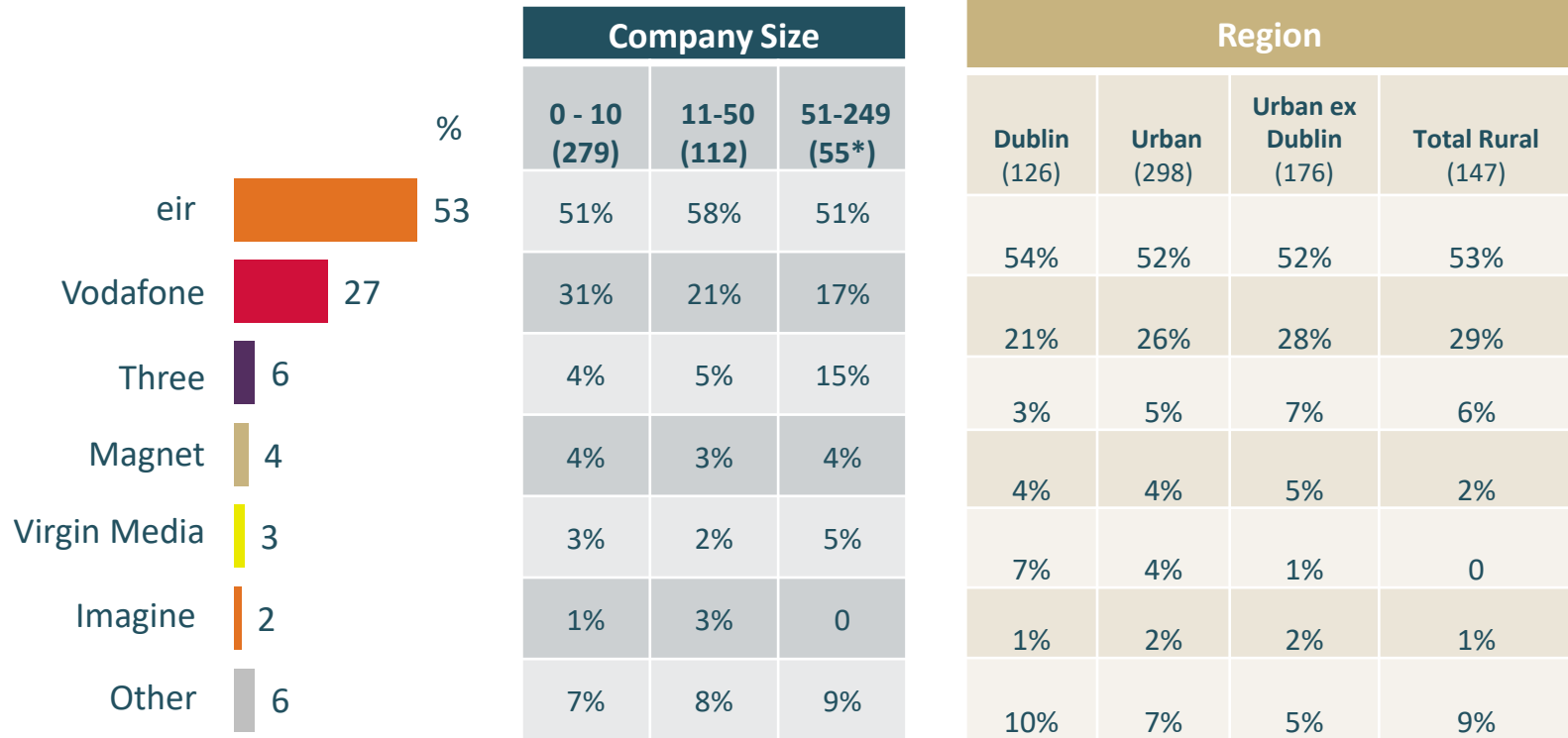


Service Provider

Fixed line Supplier for Voice Calls

(Base: All SME's With Fixed Line Phone, n=445)

Q. Which company provides the fixed line phone service you mainly use for voice calls?



*Small Base Size

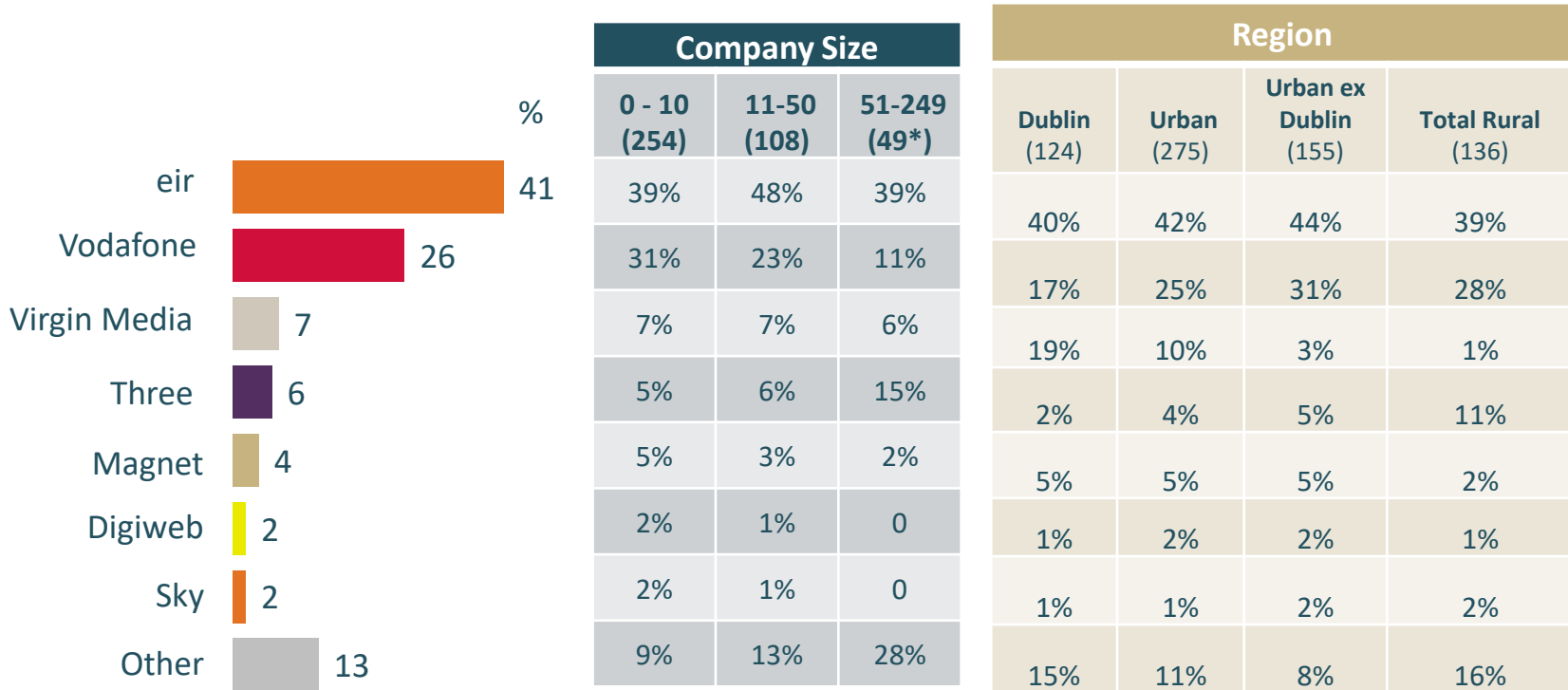
According to this survey 80% of businesses with a fixed phone service are provided with this service from eir or Vodafone



Main Business Broadband Supplier

(Base: All SME's With Broadband Services (Excl. Mobile Broadband) n=413)

Q. Which company provides your **main broadband service** for your business?



*Small Base Size

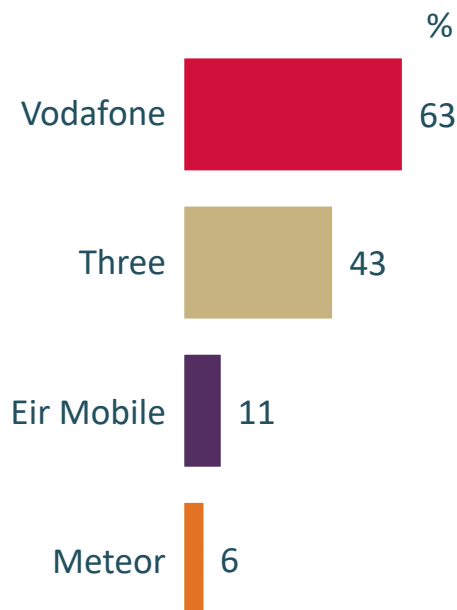
According to this survey, more than two-thirds of businesses have their main broadband service with eir or Vodafone.



Mobile Broadband Supplier (Multiple Responses Allowed)

(Base: All SMEs with Mobile Broadband, n=15*)

Q. Which company(s) provides your **mobile broadband service**, e.g. using a USB or dongle or data card which you plug into your computer?



*Small Base Size

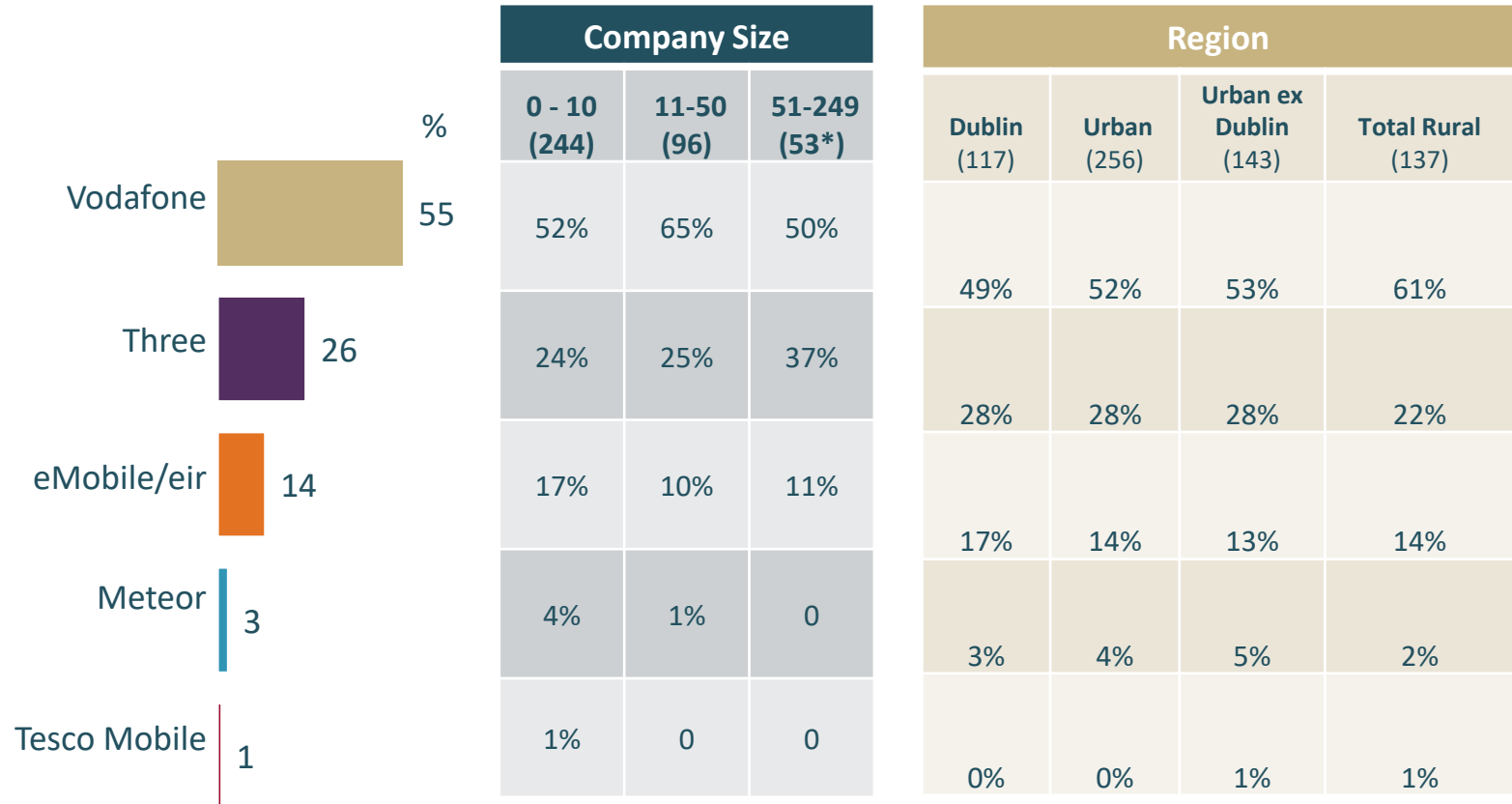
Of all the SME businesses surveyed only a small minority subscribe to a mobile broadband supplier, however, the sample size is too small to warrant any meaningful commentary.



Business Mobile Phone Provider – Main (Single Option Only)

(Base: All SMEs With Mobile Phone, n=392)

Q. Which company(s) provides your **main mobile phone service**?



*Small Base Size

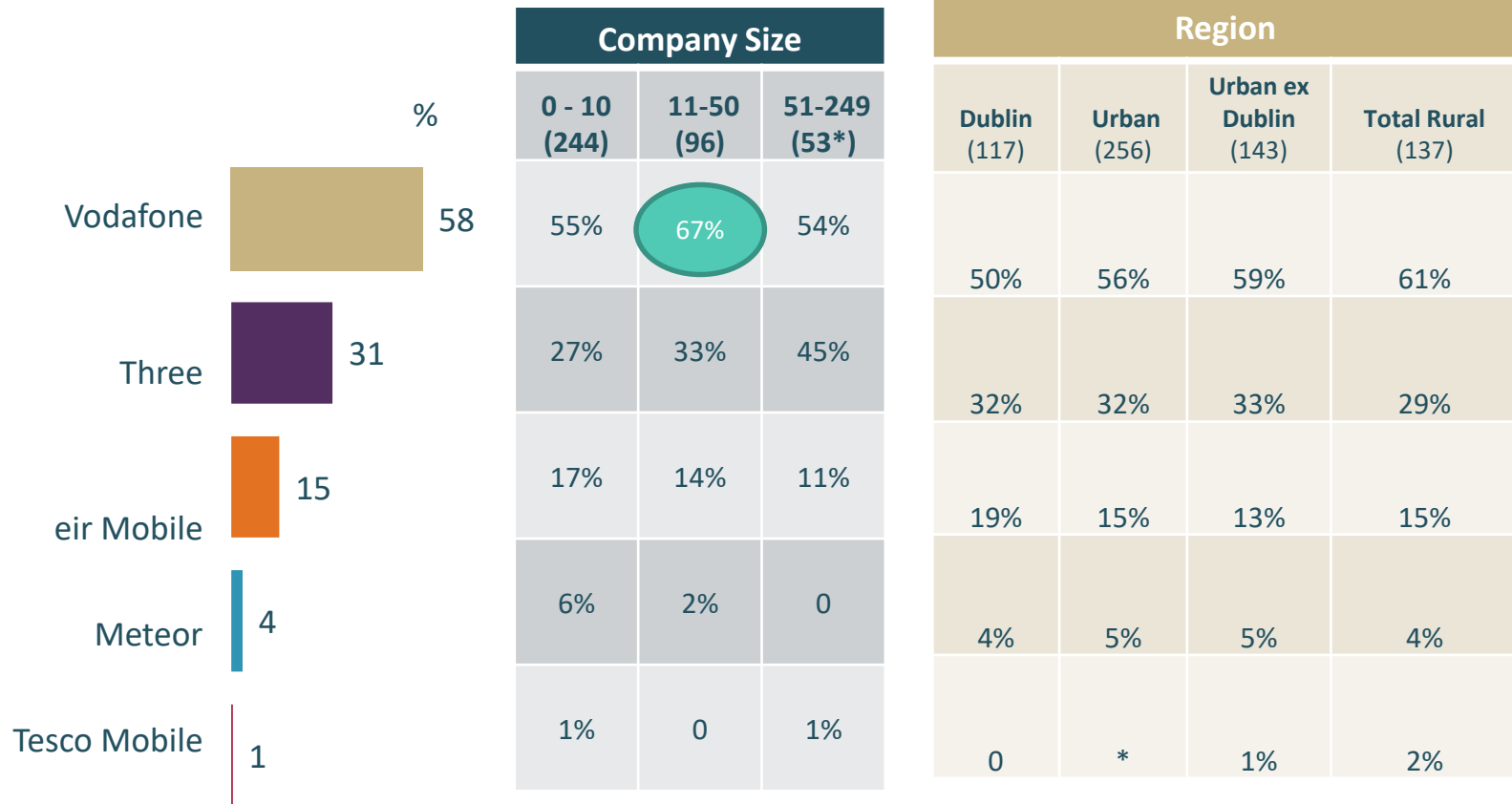
Of those SMEs with mobile phone services, 55% receive their service from Vodafone and 26% receive their service from Three mobile.



Business Mobile Phone Provider – Any (Multiple Options Allowed)

(Base: All SMEs With Mobile Phone, n=392)

Q. Which **other company**, if any, provides your **mobile phone service**?



*Small Base Size

58% of SME's surveyed with a mobile phone have a mobile phone service with Vodafone. The corresponding figure for Three is 31%



Proportion of Employees Provided with Business Mobile Phone

(Base: All SMEs With Mobile Phone, n=392)

Q. What proportion of employees have a mobile phone number provided by the business (as distinct from claiming expenses)



| Company Size | | |
|--------------|------------|--------------|
| 0 - 10 (244) | 11-50 (96) | 51-249 (53*) |
| 6% | 3% | 0% |
| 41% | 72% | 79% |
| 51% | 20% | 18% |
| 3% | 5% | 2% |
| 58% | 30% | 27% |

According to the survey, 39% of SMEs provide business mobile phones to more than half of their employees.



Proportion of Employees Provided with Business Mobile Phone

(Base: All SMEs With Mobile Phone, n=392)

Q. What proportion of employees have a mobile phone number provided by the business (as distinct from claiming expenses)



| Industry Sector | | | | | | | |
|-----------------|--------------|------------|---------------|-------------|-------------|--------------|-------------|
| Agri (11*) | Mining (34*) | Manf (26*) | Service (147) | Wsale (34*) | Retail (72) | Health (39*) | Admin (29*) |
| 0 | 10% | 3% | 4% | 0 | 10% | 3% | 0 |
| 11% | 31% | 62% | 54% | 34% | 73% | 66% | 44% |
| 79% | 59% | 28% | 40% | 66% | 16% | 24% | 52% |
| 11% | 0 | 7% | 3% | 0 | 2% | 6% | 4% |

87% 60% 40% 49% 67% 27% 37% 59%

*small base size

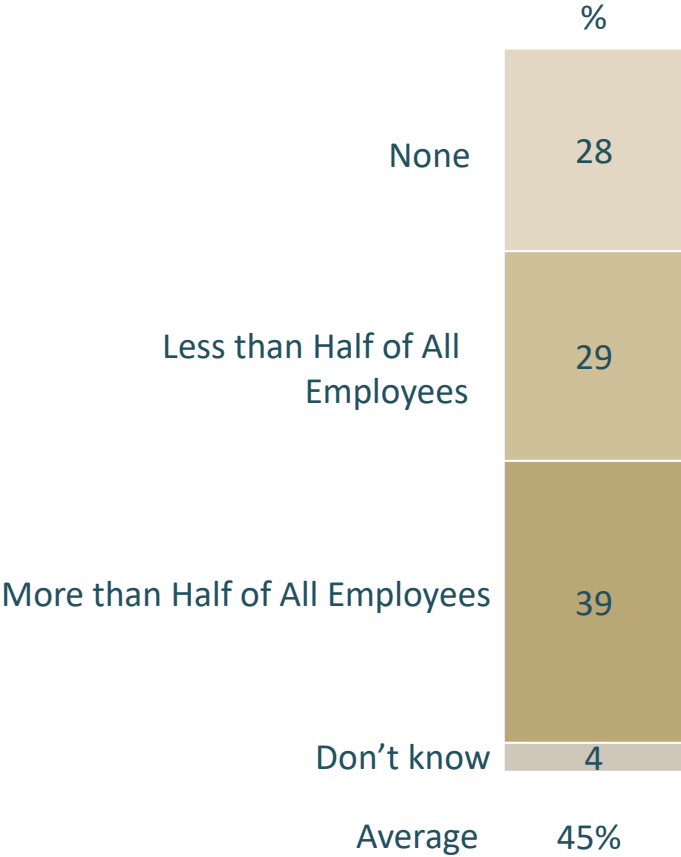
The retail sector should be noted as it has a lower than average provision of business mobile phones to employees at 27% versus 47% across the total number of SME's surveyed.



Proportion Of Employees With Fixed Line Phones in Premises

(Base: All SMEs With Fixed Line Phone, n=445)

Q. What proportion of employees have a fixed line phone primarily for their use in the premises



| Company Size | | |
|-----------------|----------------|-----------------|
| 0 - 10 (279) | 11-50 (112) | 51-249 (55*) |
| 32% | 26% | 11% |
| 24% | 29% | 54% |
| 40% | 41% | 29% |
| 4% | 4% | 5% |

*small base size

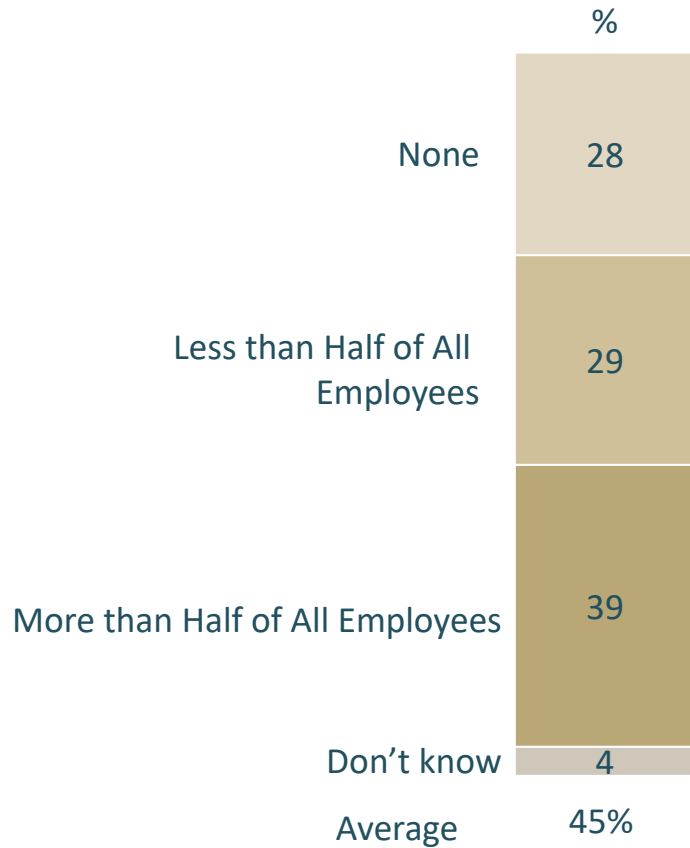
39% of SMEs surveyed report more than half of their employees have fixed line phone service in the premises. 28% of SME's in survey who have a fixed line service do not provide any fixed line phones to their employees.



Proportion Of Employees With Fixed Line Phones in Premises

(Base: All SMEs With Fixed Line Phone, n=445)

Q. What proportion of employees have a fixed line phone primarily for their use in the premises



| Industry Sector | | | | | | | |
|-----------------|--------------|------------|---------------|-------------|-------------|--------------|-------------|
| Agri (10*) | Mining (28*) | Manf (27*) | Service (169) | Wsale (38*) | Retail (96) | Health (46*) | Admin (30*) |
| 63% | 45% | 10% | 26% | 20% | 35% | 33% | 7% |
| - | 25% | 43% | 27% | 42% | 31% | 26% | 19% |
| 37% | 29% | 37% | 44% | 37% | 30% | 28% | 74% |
| - | - | 10% | 4% | - | 4% | 13% | - |
| 37% | 34% | 49% | 49% | 45% | 33% | 35% | 73% |

*small base size

39% of SMEs surveyed report more than half of their employees have fixed line phone service in the premises. 28% of SME's in survey who have a fixed line service do not provide any fixed line phones to their employees.



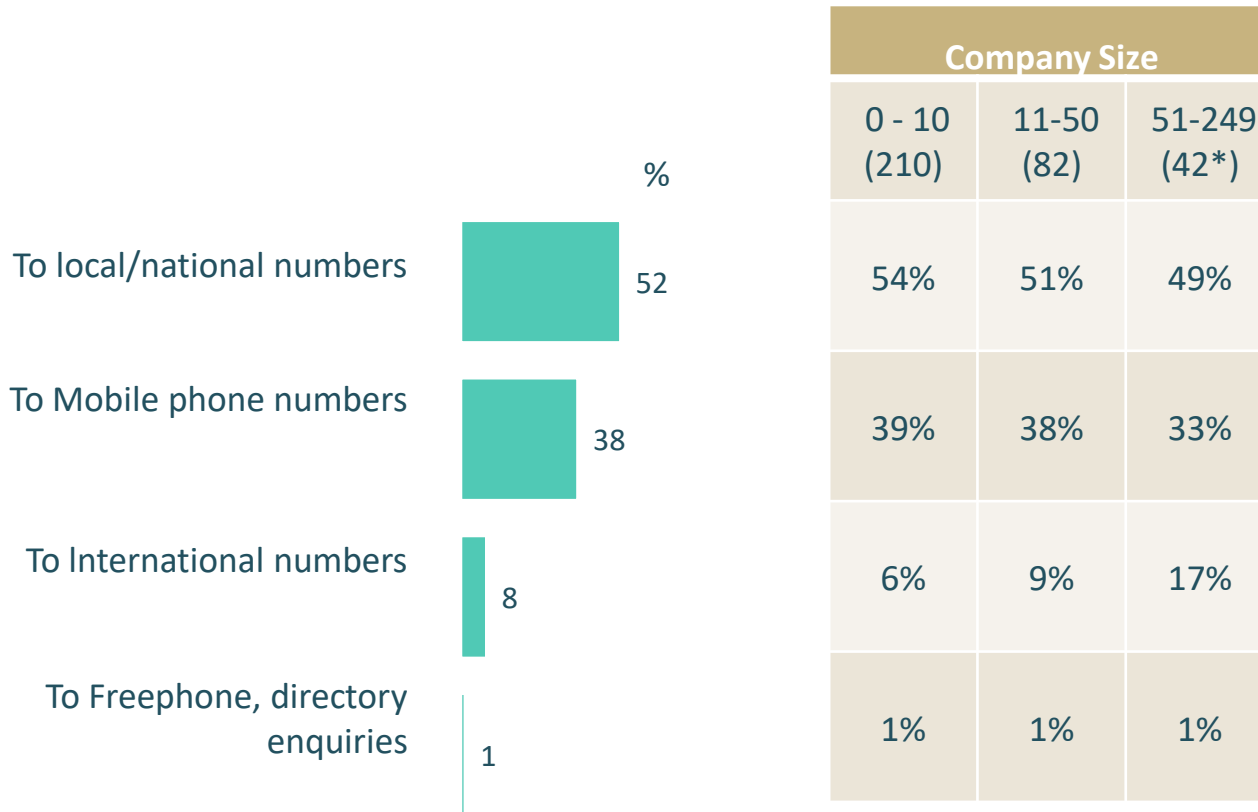


Calling Patterns

Proportion of Time Spent From Business Fixed Line Phone(s) To Each of The Following

(Base: All SMEs using Fixed phone for voice, n=334)

Q. Thinking about the calls made from your business' fixed line phone in a typical month by all employees, please provide an approximate breakdown of the amount of time spent on your business' fixed line phone for each of the following?



*small base size

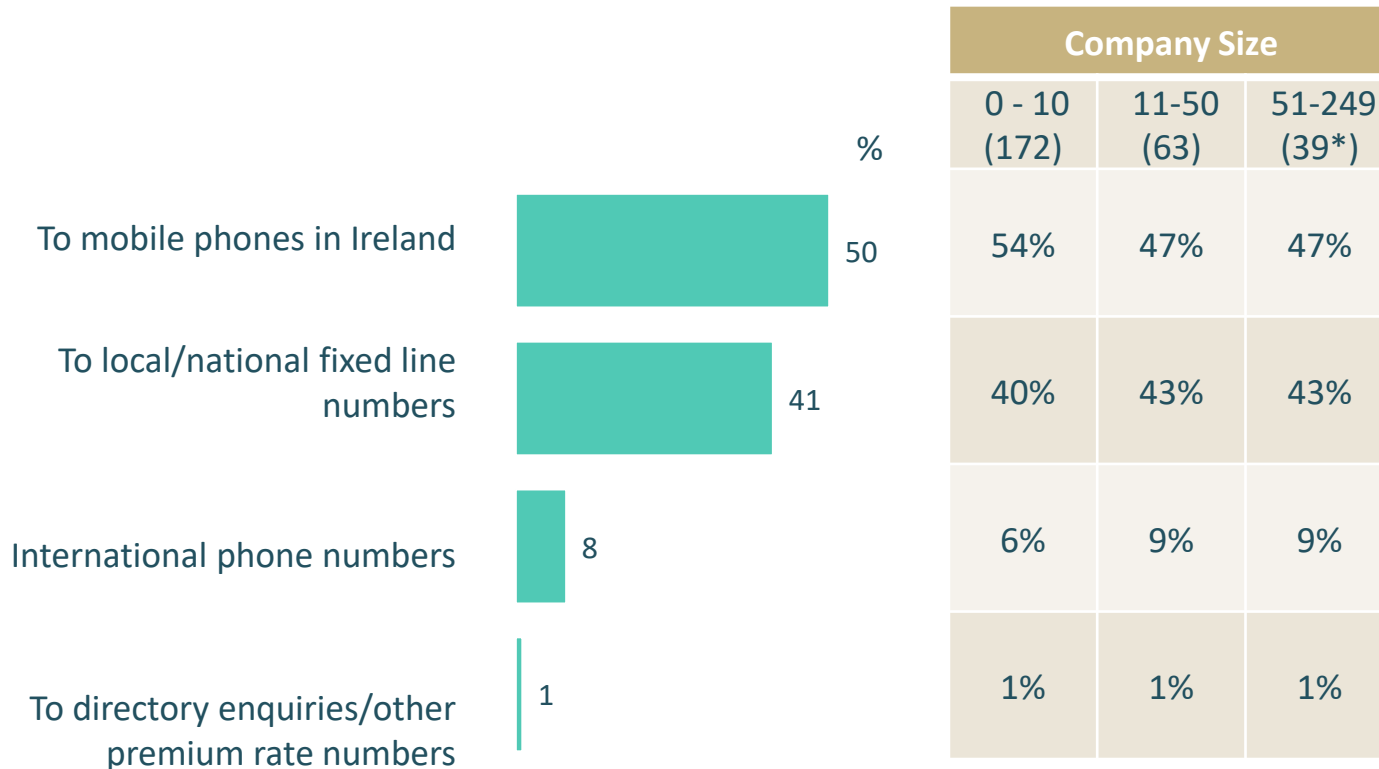
52% of calls made from a fixed line phone are made to local and national numbers while 38% are made to mobile phone numbers



Proportion of Time Spent on Employees Business Mobile Phones To Each Of The Following

(Base: All SMEs Providing Business Mobile Phones To Employees, n=363)

Q. Thinking about the calls made **from your business' mobile phones** in a typical month by all employees, please provide an approximate **breakdown of the amount of time spent** on your business' mobile phones when in the business premises **for each of the following?**



*small base size

The estimate of time spent from Employees business mobile phone in the survey to other Irish mobile phones is 50%.

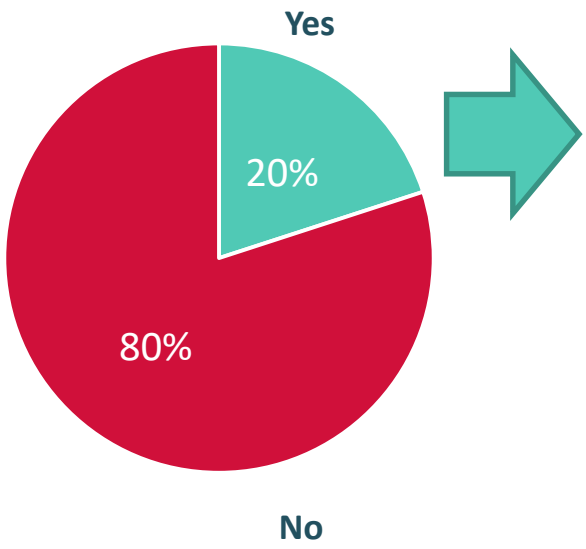


Proportion of Calls Made from Internet Based OTT App's

(Base: All SMEs using Internet based apps, n=100)

Q. Thinking about the **calls made using internet based voice Apps** such as Skype/Viber, etc. in a typical month by all employees; please provide an **approximate breakdown of the amount of time spent** on Skype or other internet-based voice applications for each of the following?

Usage of OTT Apps



Among those able to recall call type traffic from OTT service 40% estimate to call other OTT App numbers while 22% call international phone numbers

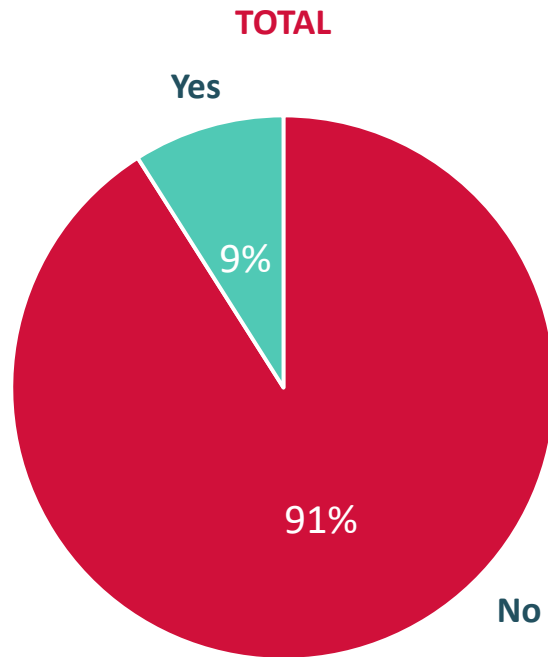
40% of all calls made from internet based apps are to other internet based app numbers.



Incidence of Business Providing Non-Geographical Numbers

(Base: All SMEs With Fixed Line Phone, n=445)

Q. Does your business provide any low call numbers such as 1800, 1850, 1870 etc. – for use by customers or employees?



| | Company Size | | |
|-----|-----------------|----------------|-----------------|
| | 0 - 10 (279) | 11-50 (112) | 51-249 (55*) |
| Yes | 4% | 16% | 20% |
| No | 96% | 84% | 80% |

*Note: Small Base Size

9% of SMEs surveyed with fixed line services provide non-geographical numbers. The incidence of providing non-geographical numbers increases in line with company size.



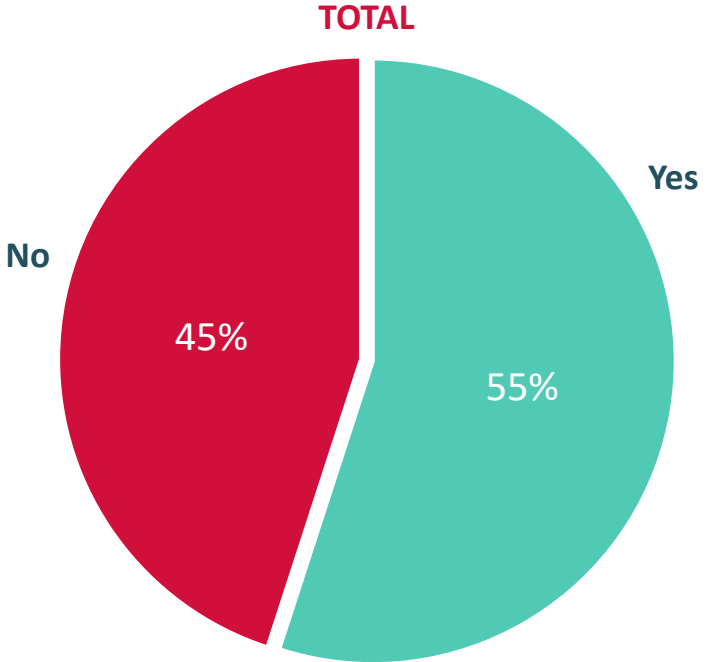


Bundles

Incidence of Fixed Line Phone Purchased as Part of a Bundle

(Base: All SME's With Fixed Line Phone Service, n=445)

Q. Does your business **purchase fixed voice telephony (calls and line rental) as part of a bundle** including other telecommunications services (e.g. broadband or mobile telephony) **from the same supplier** (i.e. a single price for several products)?



| | Company Size | | |
|-----|-----------------|----------------|-----------------|
| | 0 - 10 (279) | 11-50 (112) | 51-249 (55*) |
| Yes | 58% | 49% | 50% |
| No | 42% | 51% | 50% |

*small base size

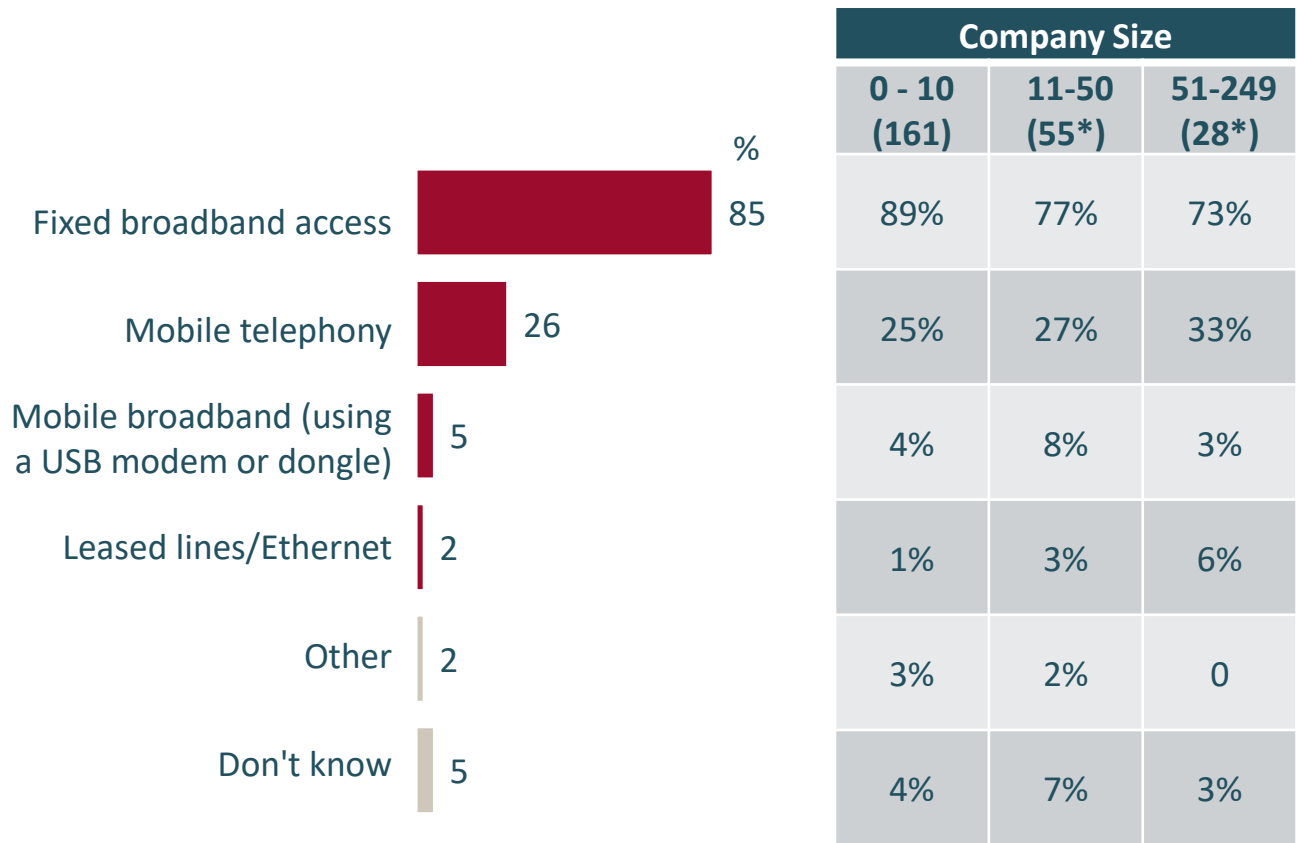
55% of SMEs in the survey with fixed line phone services purchase this service as part of a bundle.



What Services Are Included With Fixed Voice - Bundle Owners

(Base: All SMEs Purchasing Fixed Line Phone As Part Of A Bundle, n=243)

Q. What **other services are included in this bundle** in addition to your fixed voice telephony service?



*Small Base Size

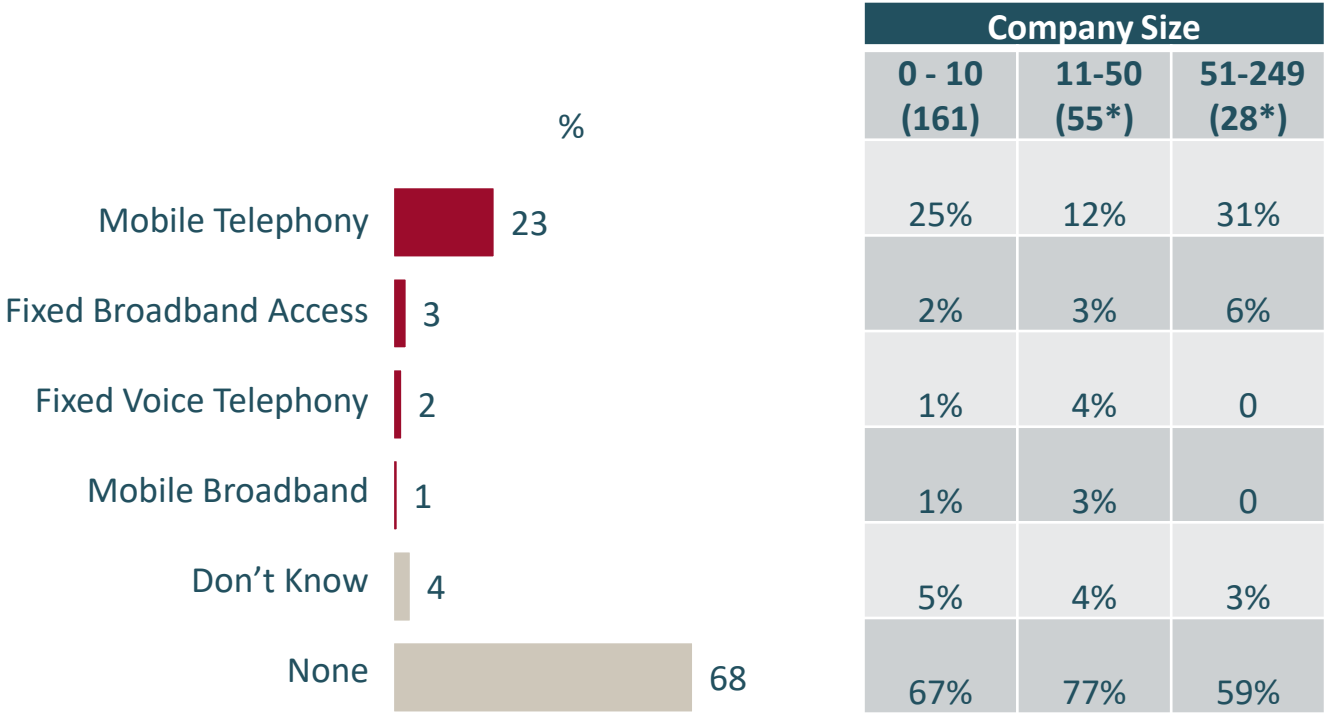
Fixed Voice bundles held by the businesses in the survey are most likely bundled with fixed broadband (85% of fixed voice bundle holders stating this) followed by Mobile Telephony at 26%.



Services Purchased Outside Fixed Voice Bundle

(Base: All SMEs Purchasing Fixed Line Phone As Part Of A Bundle, n=243)

Q. What **additional or other communications services**, if any, do you purchase that are **not included in your fixed voice telephony bundle** or package?



*Small Base Size

23% of SMEs in the survey purchasing fixed line services as part of bundle report purchasing mobile phone services outside of the bundle.



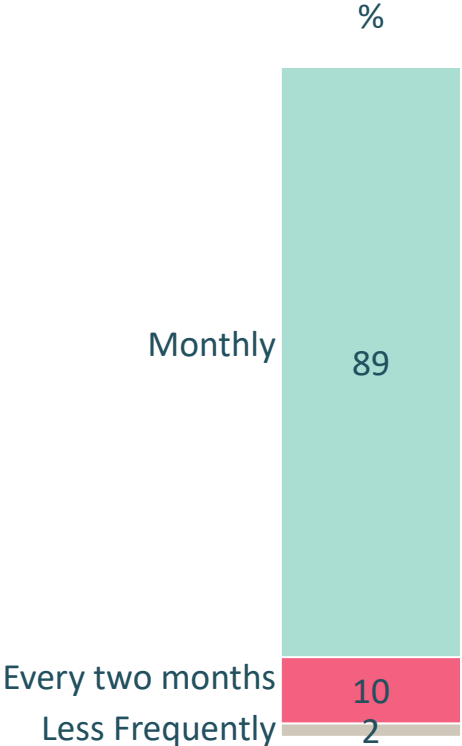


Cost Awareness

Frequency of Receiving Bills for Fixed line Phone Service

(Base: All SMEs with fixed line phone service, n=445)

Q. How often do you receive a bill from the main supplier of your fixed line phone service (this can be a printed bill or an online or email bill)?



| Company Size | | |
|-----------------|----------------|-----------------|
| 0 - 10 (279) | 11-50 (112) | 51-249 (55*) |
| 86% | 92% | 93% |
| 13% | 5% | 5% |
| 1% | 3% | 2% |

*Small Base Size

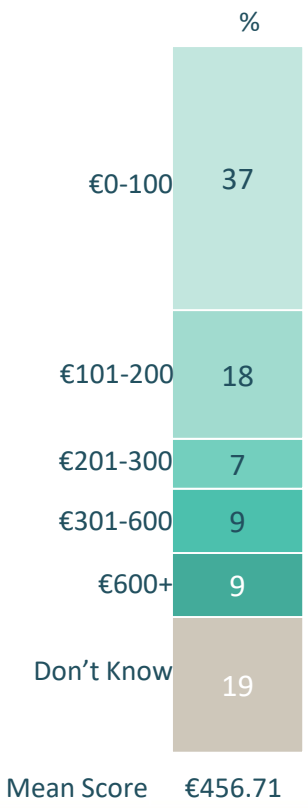
89% of SMEs in the survey with fixed line phone services receive bills on a monthly basis.



Average Monthly Cost for Fixed line Service (Line Rental + Calls)

(Base: All SMEs with fixed line phone service, n=445)

Q. On average how much do you pay per month in total for your fixed telephone service? Please include both the call costs and line rental in the total monthly cost of your fixed telephone service.



| | Company Size | | |
|------------|--------------|-------------|--------------|
| | 0 - 10 (279) | 11-50 (112) | 51-249 (55*) |
| €0-100 | 54% | 12% | 6% |
| €101-200 | 19% | 22% | 4% |
| €201-300 | 6% | 13% | 1% |
| €301-600 | 6% | 11% | 18% |
| €600+ | 2% | 13% | 44% |
| Don't Know | 13% | 30% | 26% |
| | €152.16 | €862.37 | €1,503.13 |

*Small Base Size

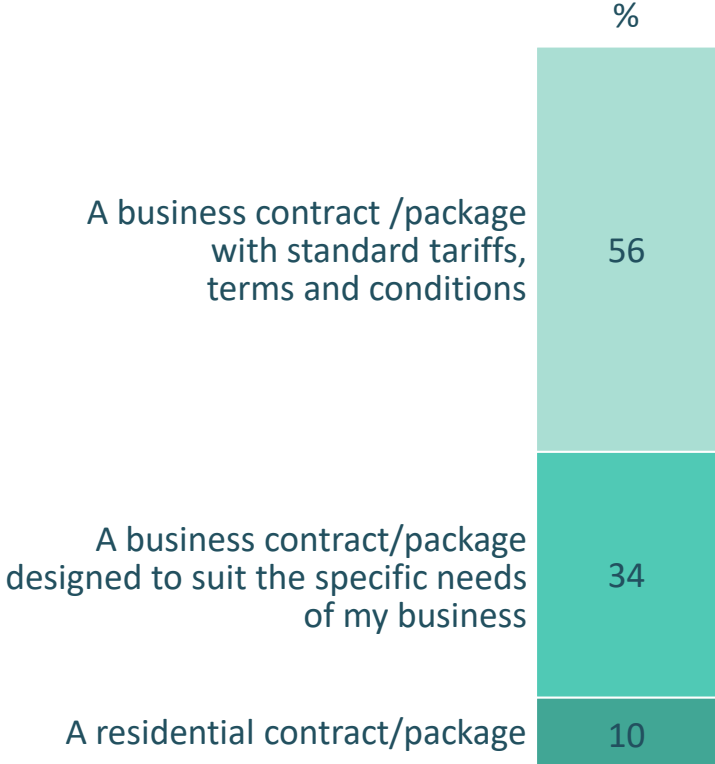
19% of businesses unsure on the average monthly cost for fixed line service



Type of Service Agreement with Fixed Line Phone Supplier

(Base: All SMEs with fixed line phone service, n=445)

Q. Which best describes the service agreement between the supplier of your **fixed line telephone service** and your business.



| | Company Size | | |
|--|-----------------|----------------|-----------------|
| | 0 - 10 (279) | 11-50 (112) | 51-249 (55*) |
| A business contract /package with standard tariffs, terms and conditions | 56% | 58% | 48% |
| A business contract/package designed to suit the specific needs of my business | 29% | 39% | 52% |
| A residential contract/package | 15% | 2% | 0 |

*Small Base Size

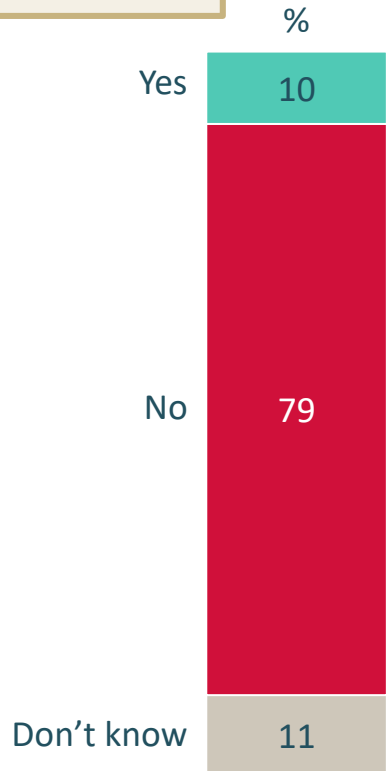
56% of SMEs in the survey with a fixed line phone services have a business contract or package with standard tariffs/T&Cs with their provider.



Incidence of Receiving Discounts Related to a Minimum Monthly Spend

Spend (Base: All SMEs With Fixed Line Phone Services With Business Contracts, n=399)

Q. As part of your business' main package for fixed line calls, are there **discounts** related to a commitment for a minimum monthly spend?.



| | Company Size | | |
|------------|-----------------|----------------|-----------------|
| | 0 - 10 (236) | 11-50 (109) | 51-249 (55*) |
| Yes | 7% | 15% | 12% |
| No | 82% | 75% | 78% |
| Don't know | 11% | 10% | 10% |

*Small Base Size

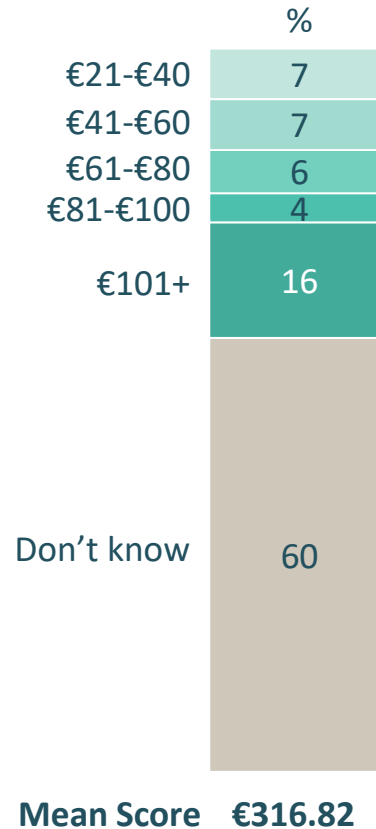
79% of SMEs in the survey with contracts for their fixed line services say that this contract/package does not include discounts received on the basis of a minimum monthly spend.



Minimum Monthly Spend needed to Avail of Discounted Offers

(Base: All SMEs With Fixed Line Phone Service With Agreed Minimum Monthly Spend, n=40*)

Q. What is the **minimum monthly spend that your business has committed** to in order to avail of the discounts offered?



*Small Base Size

For those SMEs in the survey 60% are unaware of the minimum monthly spend needed to avail of discounted offers; however, the sample size is too small to warrant any meaningful commentary.

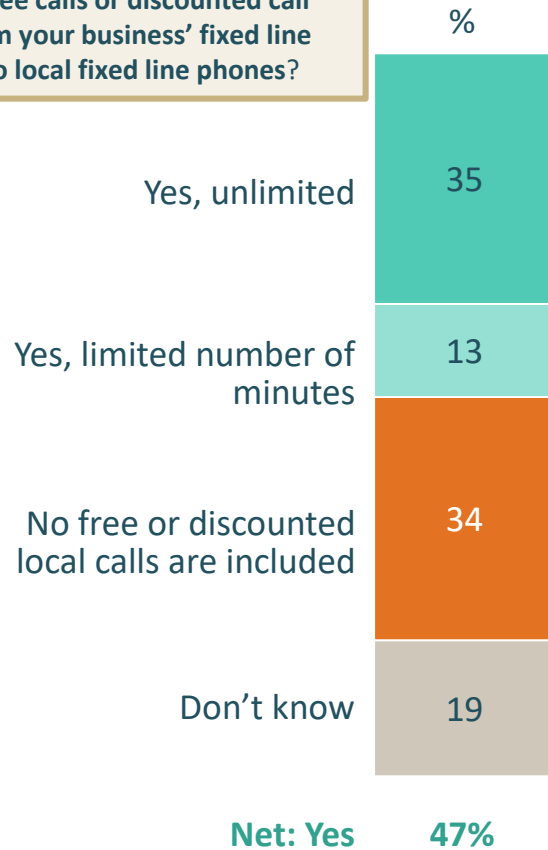


Incidence of Free or Discounted Calls from Fixed line

Phones to Local Fixed line Phone

(Base: All SMEs With Fixed Line Phone Services, n=445)

Q. Thinking about your supplier of fixed line calls, does your package include free calls or discounted call costs from your business' fixed line phones to local fixed line phones?



| | Company Size | | |
|--|-----------------|----------------|-----------------|
| | 0 - 10 (279) | 11-50 (112) | 51-249 (55*) |
| Yes, unlimited | 39% | 30% | 23% |
| Yes, limited number of minutes | 12% | 11% | 19% |
| No free or discounted local calls are included | 30% | 37% | 48% |
| Don't know | 19% | 21% | 11% |
| | 51% | 41% | 41% |

*Small Base Size

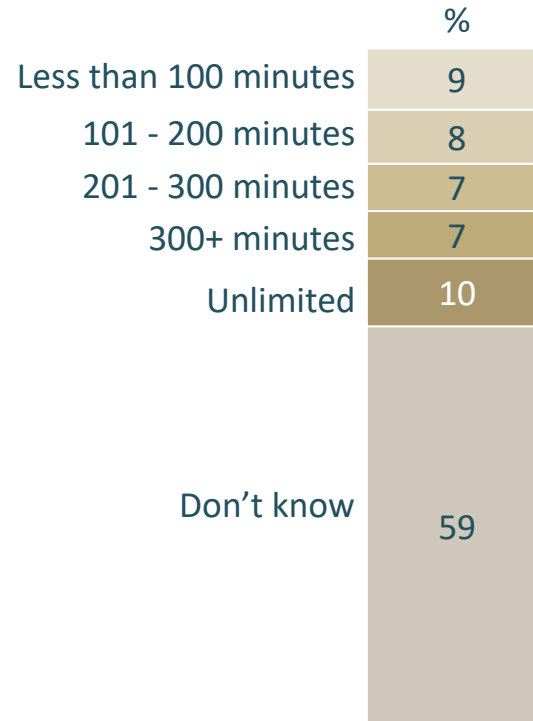
35% of SMEs surveyed with a fixed line phone services report receiving unlimited free or discounted calls from their fixed line phone to local fixed line phones.



Number of Limited Free or Discounted Minutes from Fixed line Phones to Local Fixed line Phones

(Base: All SMEs With Limited Free Or Discounted Minutes To Call Local Fixed Line Phones, n=56*)

Q. How many **minutes per billing period** can be used within your package to make calls from **your business' fixed line phone to other local fixed phone numbers** at no extra cost?



*Small Base Size

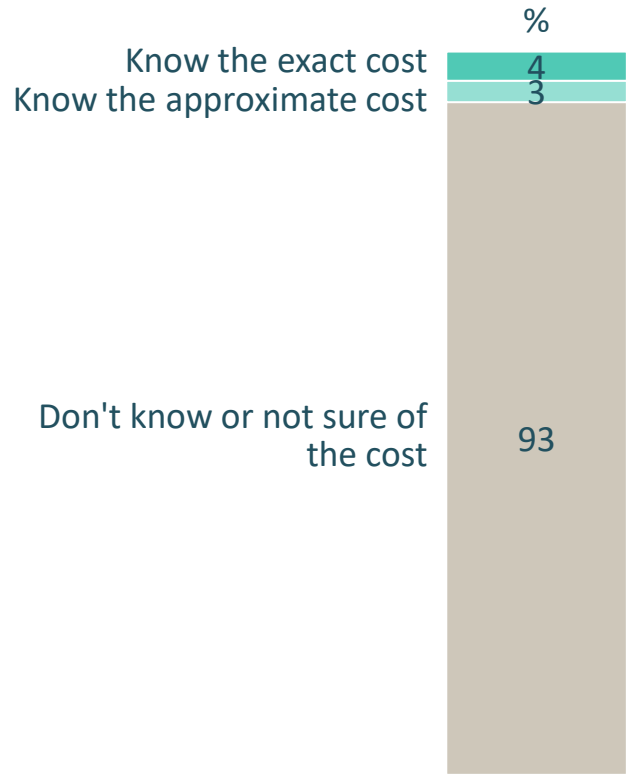
59% of SMEs surveyed with limited free or discounted minutes to call local fixed line phones report not knowing the actual number of minutes they receive as part of their contract/package; however, the sample size is too small to warrant any meaningful commentary.



Incidence Of Knowing The Exact Cost Of Calls From Fixed Line Phones To Local Fixed Lines

(Base: All SMEs With Fixed Line Phones, n=445)

Q. Could you state whether you know the cost of making calls from your business' fixed line phone to other local fixed line phones in instances where you need to pay for the call?



| | Company Size | | |
|------------------------------------|-----------------|----------------|-----------------|
| | 0 - 10 (279) | 11-50 (112) | 51-249 (55*) |
| Know the exact cost | 2% | 6% | 8% |
| Know the approximate cost | 4% | 2% | 3% |
| Don't know or not sure of the cost | 94% | 92% | 89% |

*Small Base Size

NET: know any

7%

6%

8%

11%

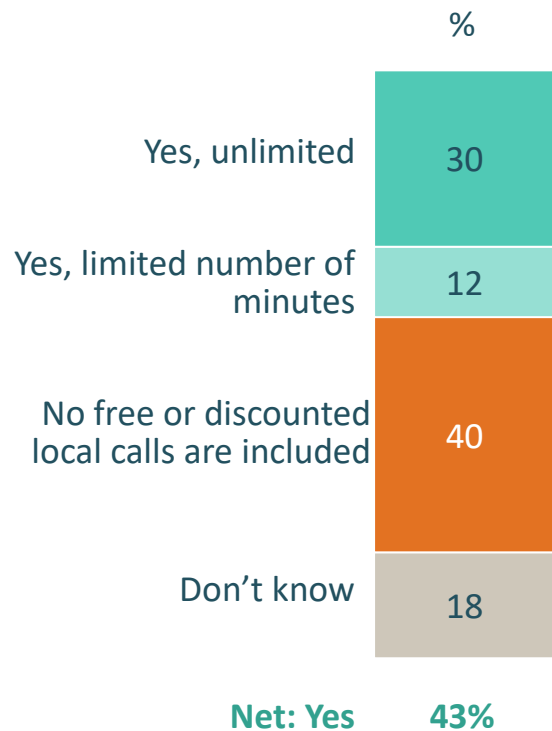
Overwhelming majority (93%) of SMEs surveyed with fixed line services report not knowing the cost of calls to local fixed lines in their contract/package.



Incidence of Free or Discounted Calls from Fixed line Phones to National Fixed line Phone

(Base: All SMEs With Fixed Line Phone Services, n=445)

Q. Does your package include free calls or discounted call costs from your business' fixed line phones to national fixed line phones?



| | Company Size | | |
|--|-----------------|----------------|-----------------|
| | 0 - 10 (279) | 11-50 (112) | 51-249 (55*) |
| Yes, unlimited | 35% | 22% | 26% |
| Yes, limited number of minutes | 12% | 12% | 13% |
| No free or discounted local calls are included | 36% | 44% | 52% |
| Don't know | 18% | 22% | 10% |
| | 47% | 35% | 38% |

*Small Base Size

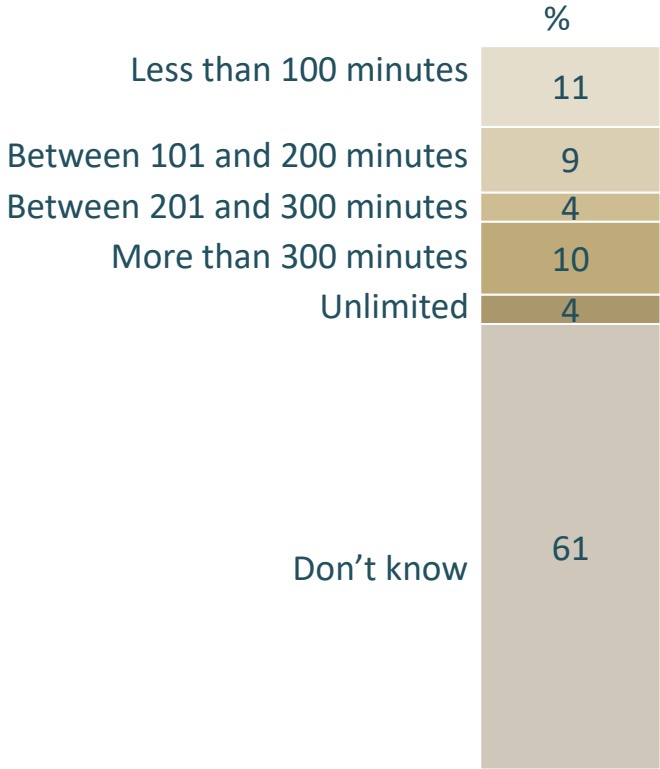
30% of SMEs in the survey with fixed line phone services receive unlimited free or discounted minutes to national fixed line phones



Number of Free or Discounted Minutes from Fixed line Phones to National Fixed line Phones

(Base: All SMEs With Limited Free Or Discounted Minutes To Call Local Fixed Line Phones, n=54*)

Q. How many **minutes per billing period** can be used within your package to **make calls from your business' fixed line phones to other national fixed phone numbers** at no extra cost?



*Small Base Size

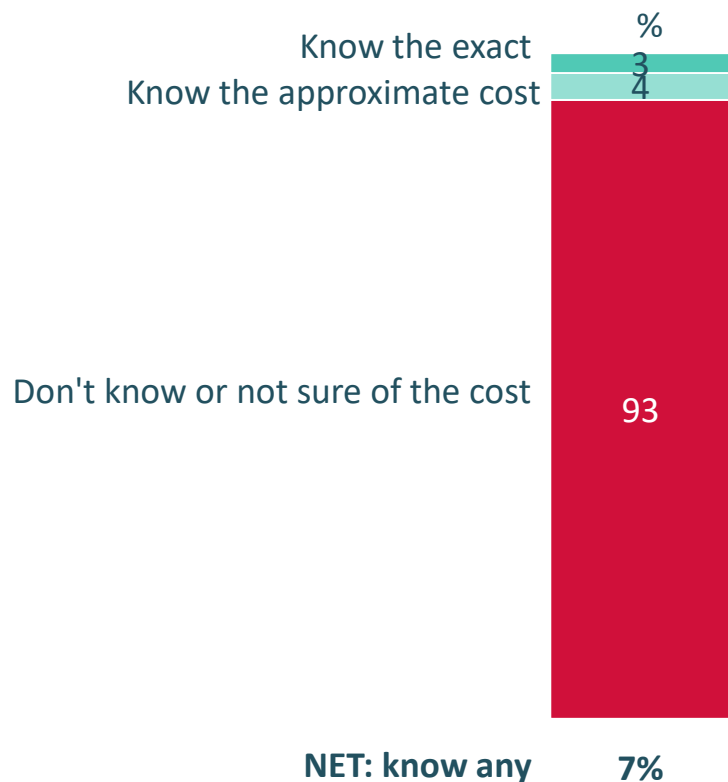
61% of SMEs in the survey with limited free or discounted minutes to call national fixed line phones report not knowing the actual number of minutes they receive as part of their contract/package. However, sample size is too small to warrant any meaningful commentary.



Incidence Of Knowing The Exact Cost Of Calls From Fixed Line Phones To National Fixed Lines

(Base: All SMEs With Fixed Line Phones, n=445)

Q. Could you state whether you know the **cost of making calls from your business' fixed line phones to national fixed line phones** in instances **where you need to pay for the call**?



| | Company Size | | |
|--|-----------------|----------------|-----------------|
| | 0 - 10 (236) | 11-50 (109) | 51-249 (55*) |
| Know the exact cost of calls to fixed line phones | 2% | 2% | 10% |
| Know the approximate cost of calls to fixed line phones | 3% | 5% | 3% |
| Don't know or not sure of the cost of calls to fixed line phones | 95% | 93% | 87% |
| | 5% | 7% | 13% |

*Small Base Size

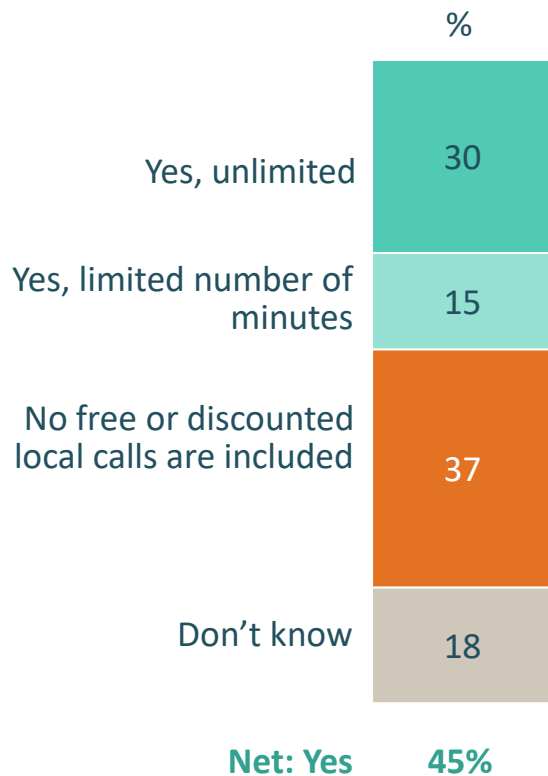
93% of SMEs with fixed line phone services report not knowing the exact cost of calls from their fixed line to national fixed line phone numbers.



Incidence Of Free Or Discounted Calls From Fixed Line Phones To Mobile Phones

(Base: All SMEs With Fixed Line Phone Services, n=445)

Q. Does your package include **free call minutes or discounted call costs** to mobile phone numbers?



| | Company Size | | |
|--|-----------------|----------------|-----------------|
| | 0 - 10 (279) | 11-50 (112) | 51-249 (55*) |
| Yes, unlimited | 33% | 26% | 22% |
| Yes, limited number of minutes | 14% | 17% | 18% |
| No free or discounted local calls are included | 36% | 33% | 52% |
| Don't know | 17% | 24% | 8% |
| | 47% | 43% | 40% |

*Small Base Size

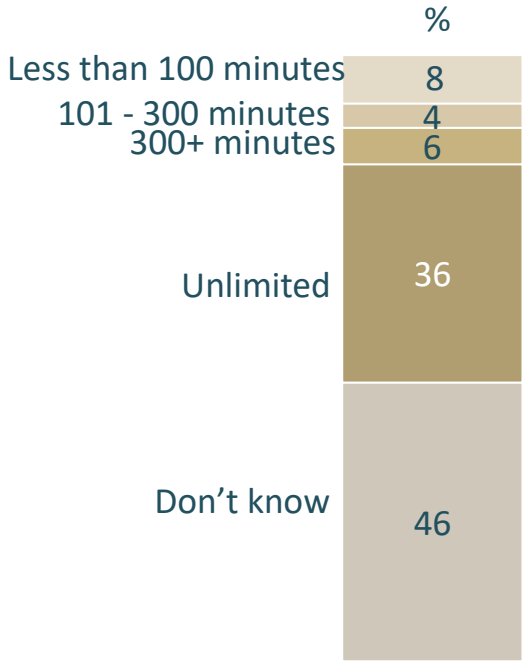
30% of SMEs surveyed with fixed line phone services receive unlimited free or discounted minutes to mobile phones.



Number Of Free Or Discounted Minutes From Fixed Line Phones To Mobile Phones

(Base: All SMEs With Limited Free Or Discounted Minutes To Call Local Fixed Line Phones, n=200)

Q. How many **minutes per billing period** can be used within your package to **make calls to mobiles** at no extra cost?



| | Company Size | | |
|-----------------------|-----------------|----------------|-----------------|
| | 0 - 10 (131) | 11-50 (47*) | 51-249 (22*) |
| Less than 100 minutes | 10% | 5% | 8% |
| 101 - 300 minutes | 6% | 0 | 0 |
| 300+ minutes | 7% | 6% | 4% |
| Unlimited | 33% | 38% | 47% |
| Don't know | 46% | 51% | 42% |

*Small Base Size

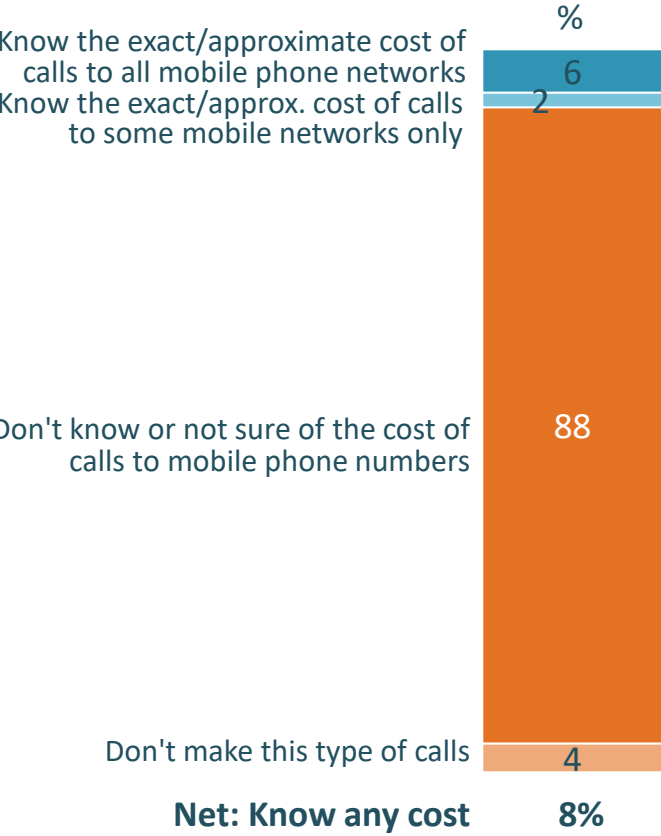
36% of SMEs report having unlimited free or discounted calls from their fixed line phones to mobile phones while 46% say they don't know the number of free or discounted minutes.



Incidence Of Knowing The Exact Cost Of Calls From Fixed Line Phones To Mobile Phones

(Base: All SMEs with fixed line phones, n=445)

Q. Could you state whether you know the **cost of making calls from your business' fixed line phone to mobile phones** (outside of any free minutes included in the package)?



| Company Size | | |
|-----------------|----------------|-----------------|
| 0 - 10 (279) | 11-50 (112) | 51-249 (55*) |
| 4% | 7% | 10% |
| 1% | 3% | 6% |
| 89% | 88% | 81% |
| 5% | 3% | 4% |
| 5% | 9% | 16% |

*Small Base Size

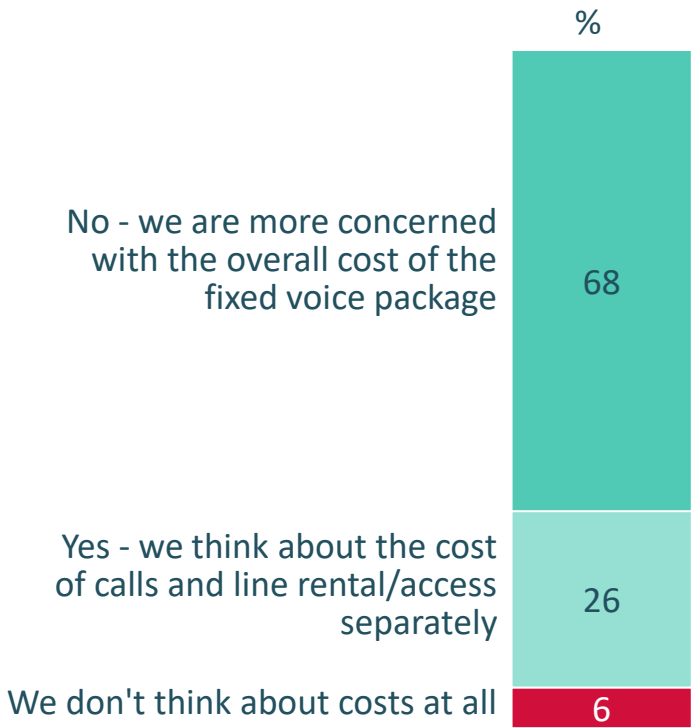
88% of SMEs in the survey with fixed line phone service say they don't know the actual cost of calls from their fixed line phone to mobile phone numbers.



When Thinking of Fixed Telecommunication Cost Do You Think of Line Rental Separate to Fixed Telecoms Cost

(Base: All SMEs With Fixed Line Phones, n=445)

Q. When you are thinking about (and reviewing) the cost of the fixed business telecommunications services, do you think about the cost of calls and line rental/access separately?



| | Company Size | | |
|---|-----------------|----------------|-----------------|
| | 0 - 10 (236) | 11-50 (109) | 51-249 (55*) |
| No - we are more concerned with the overall cost of the fixed voice package | 75% | 53% | 66% |
| Yes - we think about the cost of calls and line rental/access separately | 20% | 39% | 29% |
| We don't think about costs at all | 5% | 8% | 5% |

*Small Base Size

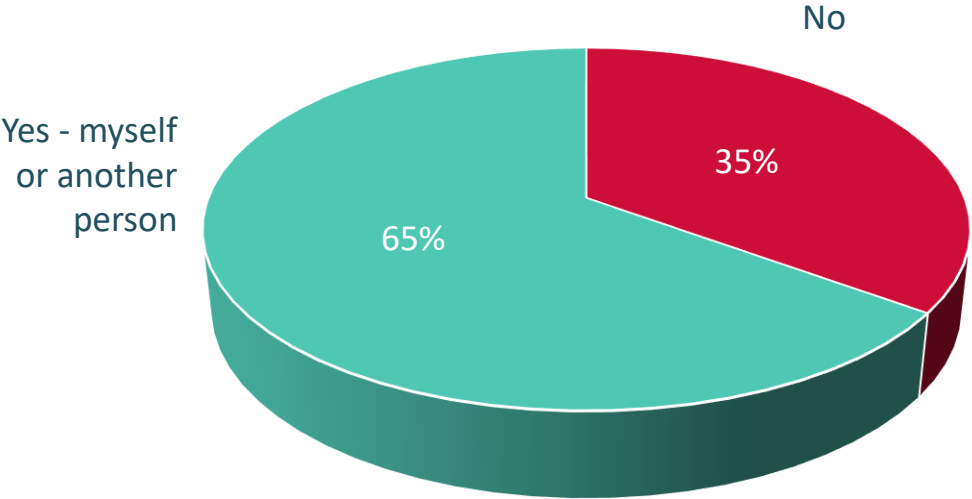
68% of SME's surveyed are more concerned with the overall cost of fixed voice package.



Incidence of Checking In Detail Phone Bill Received by Business

(Base: All SMEs With Fixed Line Services, n=445)

Q. Do you or does somebody else in your organisation **check in detail the fixed phone bills** that your business receives (either electronically or in the post)?



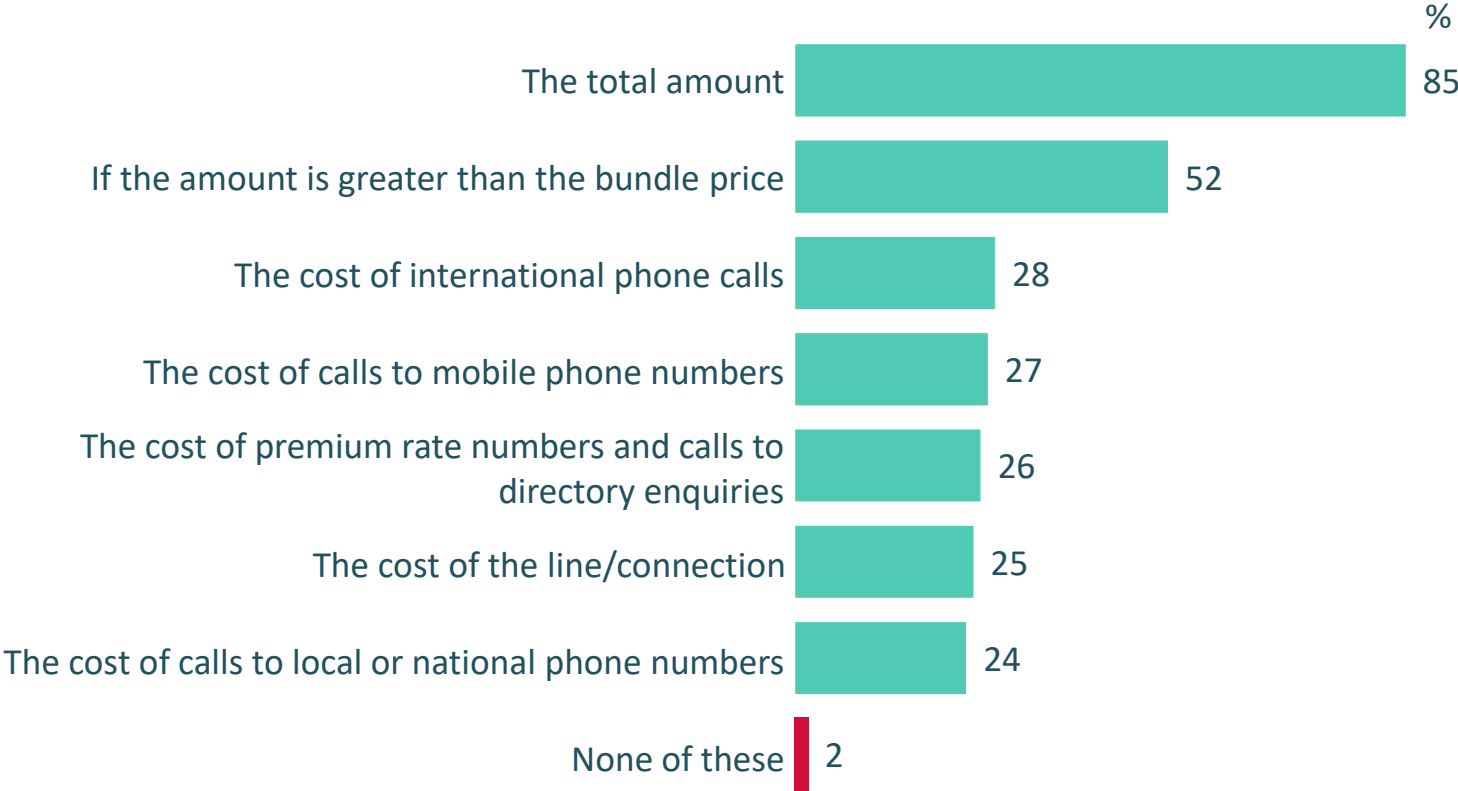
65% of SME businesses surveyed check phone bills received by the business in detail



What Items Are Checked of Fixed Line Phone Bill

(Base: All SMEs With Fixed Line Services checking phone bill, n=291)

Q. Which of the following are **checked on each bill**?

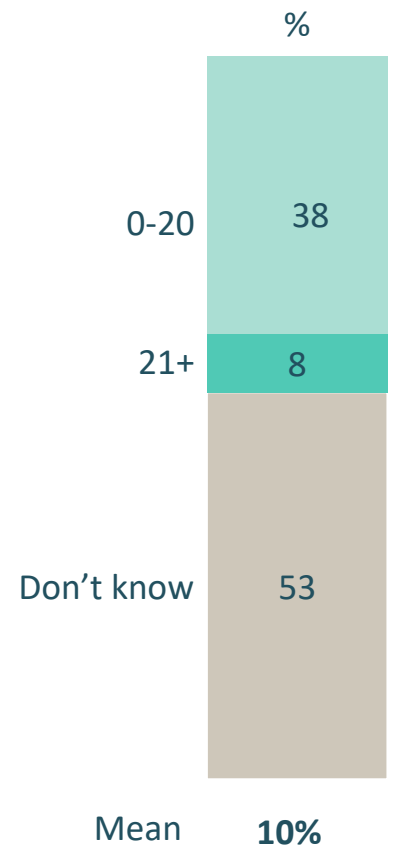


Of the SME's in the survey who check their phone bill the total amount is the most likely item checked with 85% of SME's stating this.



Proportion of Total Communication Costs related to Non-Geographical Numbers (Base: All SMEs Providing Non-Geographical Numbers, n=40*)

Q. What proportion of your **total communications cost** is related to these low call numbers?



*Small Base Size

38% of those businesses surveyed report that provision of non-geographical numbers constitutes less than 20% of their total communication budget. However, the sample size is too small to warrant any meaningful commentary.



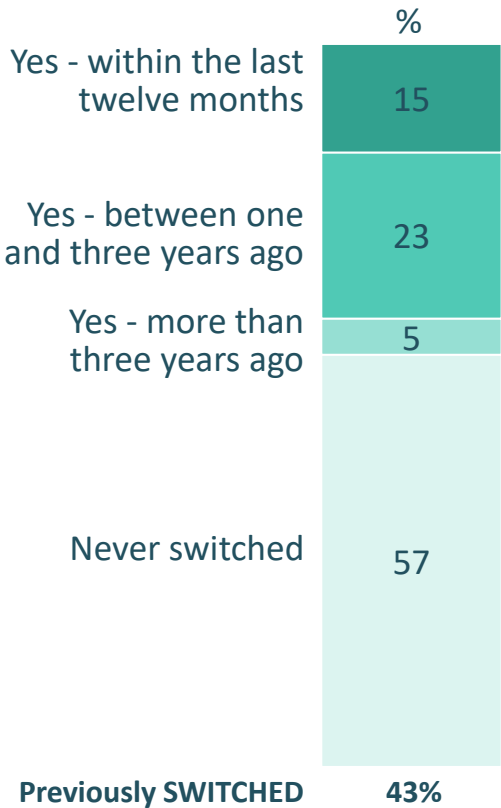


Switching

Incidence of Ever Switching Fixed line Phone Supplier

(Base: All SME's With Fixed Line Phone, n=445)

Q. Have you **switched fixed line phone service supplier**? Please consider if you have **switched any supplier**)



| Company Size | | |
|-----------------|----------------|-----------------|
| 0 - 10 (279) | 11-50 (112) | 51-249 (55*) |
| 16% | 14% | 14% |
| 22% | 27% | 21% |
| 4% | 6% | 8% |
| 58% | 54% | 57% |
| 42% | 46% | 43% |

*Small Base Size

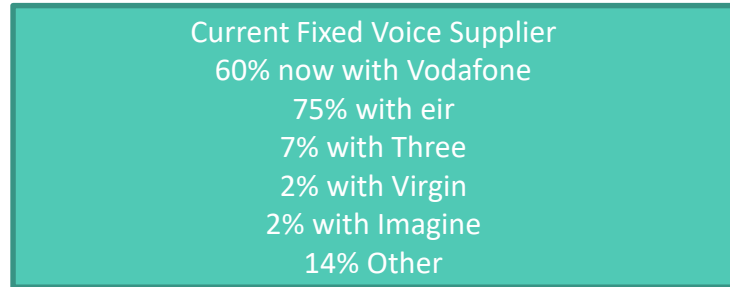
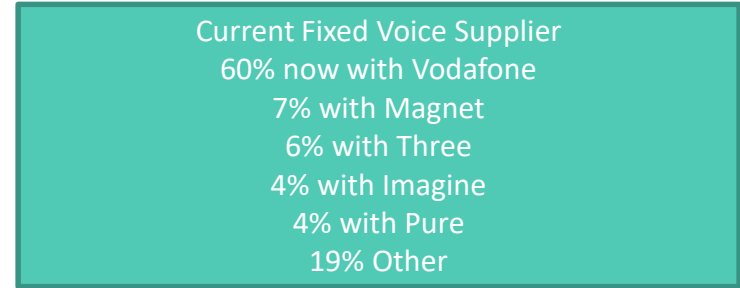
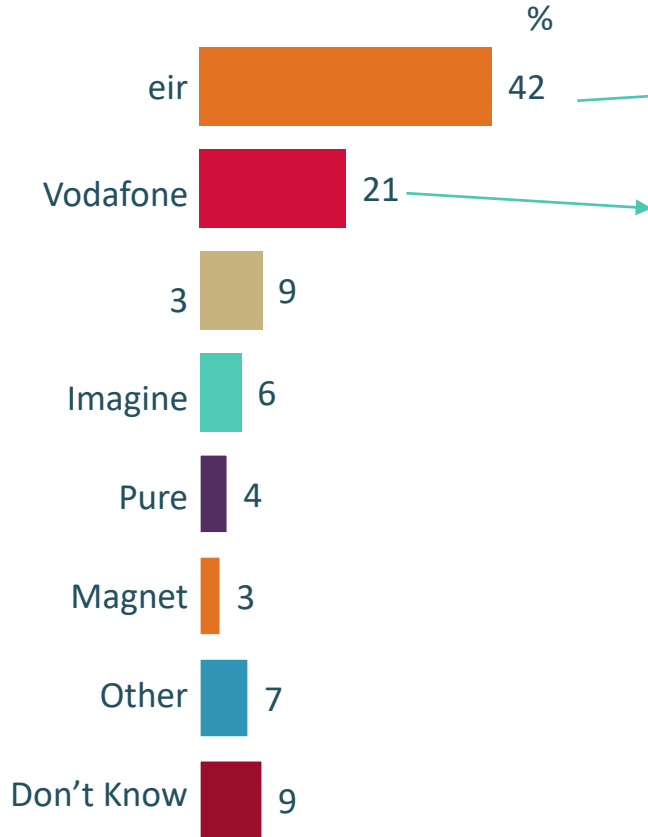
Of the SME's interviewed in the survey 38% have switched fixed line phone supplier in the past three years.



Previous Fixed line Phone Supplier (All Fixed Line Switchers)

(Base: All SME's Which Have Switched Fixed Line Phone Suppliers, n=186)

Q. Which **fixed line phone service supplier** were you **previously with**?



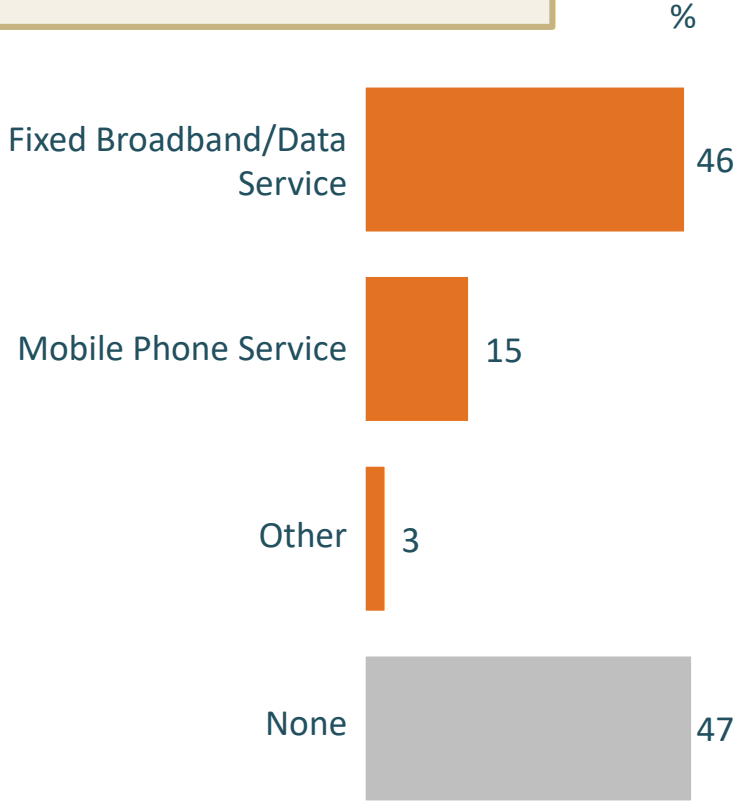
According to this survey, 42% of business surveyed who switched supplier were previously with eir



Other Telecoms Services Purchased With Previous Fixed Line Phone Service Supplier

(Base: All SME's Which Have Switched Fixed Line Phone Suppliers, n=192)

Q. Did you purchase any other telecommunications services from this supplier?



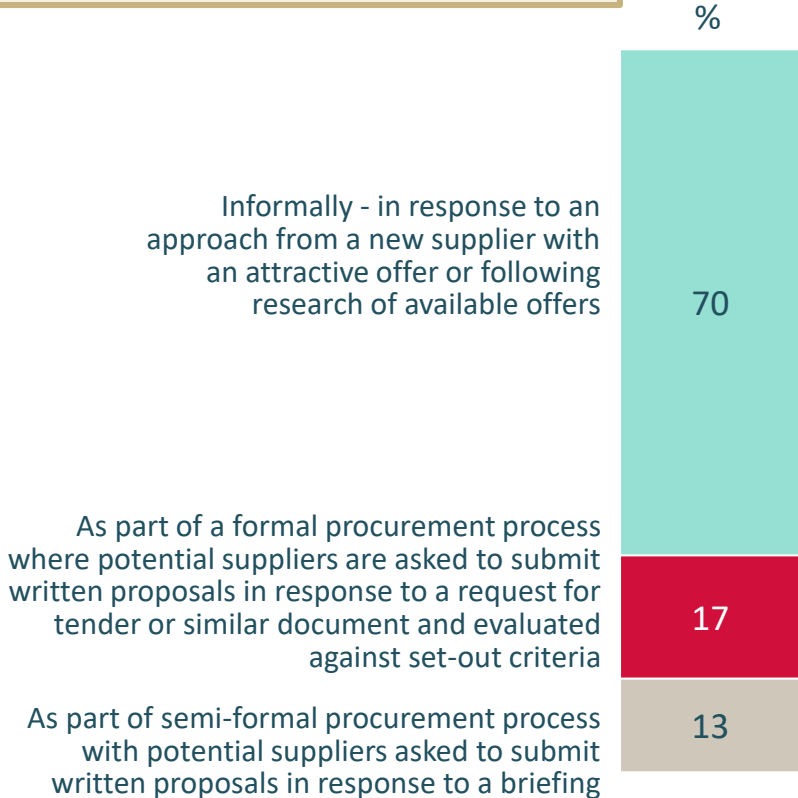
Of the SME's who switched in the survey the most likely other telecoms service purchased with previous supplier was fixed broadband/data service (46%)



Approach Used To Selecting Fixed Line Phone Supplier

(Base: All SME's With Fixed Line Phone, n=445)

Q. Thinking about **your business' approach to selecting a fixed line phone supplier**, which of the following statements best captures its approach?



| Company Size | | |
|--------------|-------------|--------------|
| 0 - 10 (279) | 11-50 (112) | 51-249 (55*) |
| 78% | 59% | 52% |
| 12% | 20% | 33% |
| 10% | 21% | 15% |

*Small Base Size

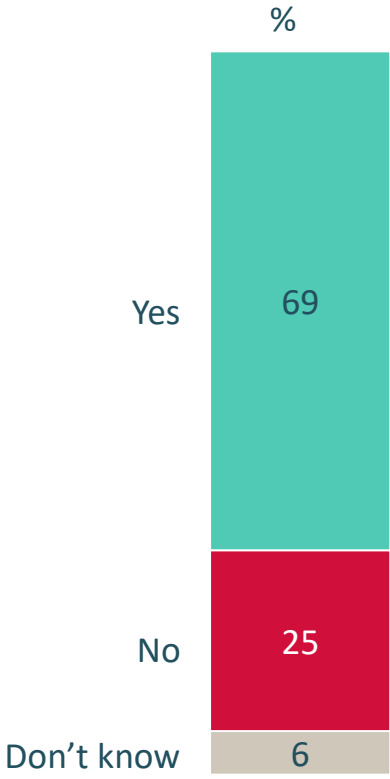
70% of SME's surveyed stated that an attractive offer led to the selection of their fixed line phone supplier – higher for the smaller business sector (78%)



Incidence of Reviewing Fixed line Provider Arrangements in the Past 3 Years

3 Years (Base: All SME's With Fixed Line Phone, n=445)

Q. Has your business reviewed its telecommunications services provider arrangements within the last 3 years??



| Company Size | | |
|-----------------|----------------|-----------------|
| 0 - 10 (279) | 11-50 (112) | 51-249 (55*) |
| 66% | 73% | 77% |
| 30% | 19% | 13% |
| 5% | 9% | 10% |

*Small Base Size

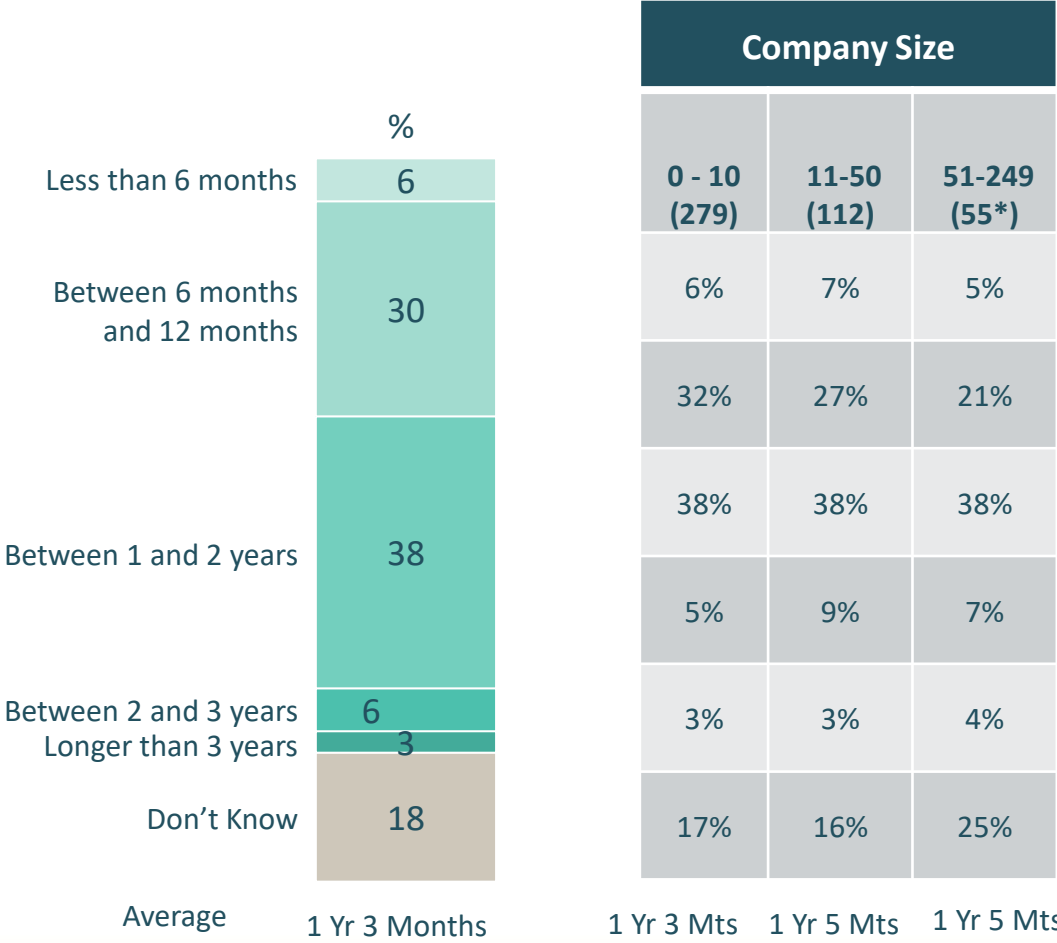
69% of SME's surveyed state that they have reviewed their fixed line provider arrangements within the past three years – higher among SME's with 51-249 Employees (77%)



Length of Current Contract with Fixed line Phone Provider

(Base: All SME's With Fixed Line Phone, n=445)

Q. What is the length of your current contract for the provision of your **fixed line phone service**?

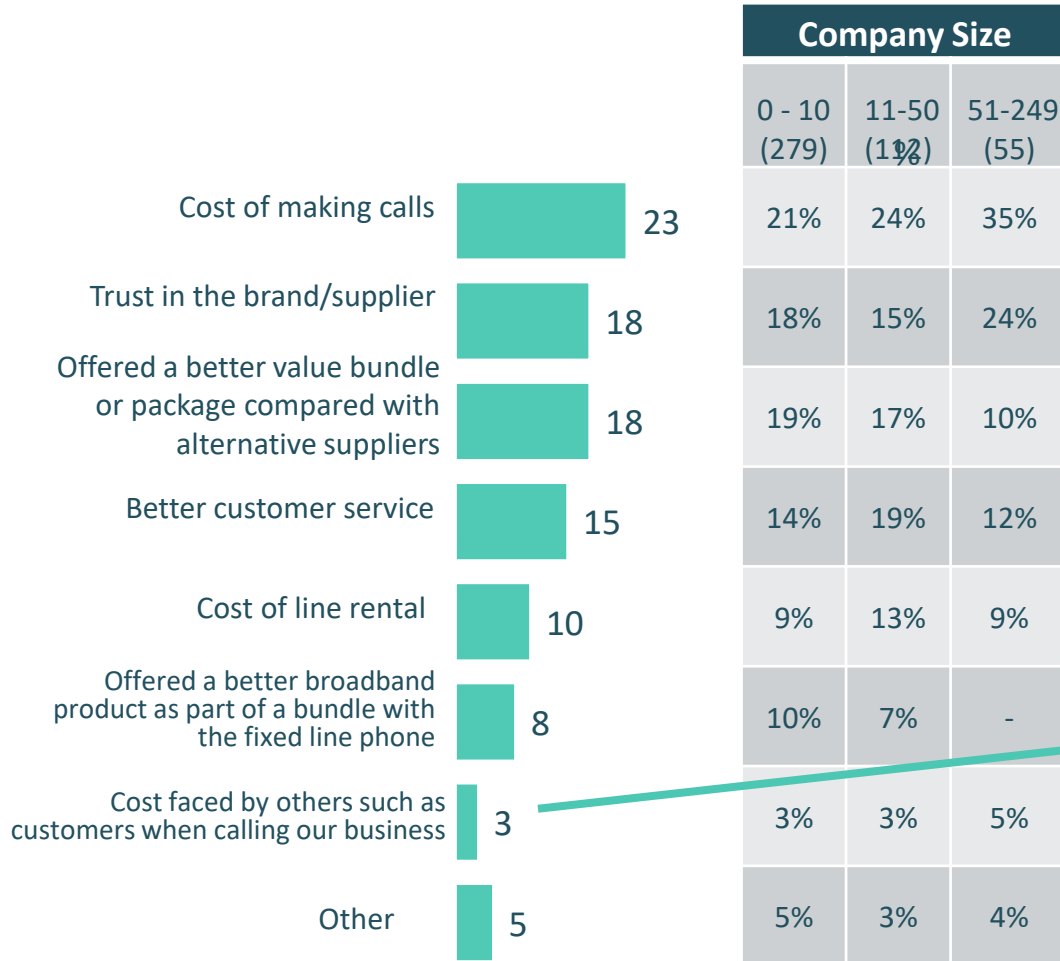


On average, SME businesses surveyed have a current fixed line phone contract length of one year and 3 months.



Main Reason for Choosing Current Fixed line Supplier

(Base: All SME's With Contract Length 3 years or less n=352)



Q. Thinking about **when you chose your current fixed line phone service supplier**, please select the **top three reasons** that were important at the time?

Cost faced by other when calling the business.
 Among the businesses stating this 65% relate to cost of calling to a mobile and 36% relate to cost of calling to a fixed line. 37% of business expressing concern here asked business to text or email instead of making a call

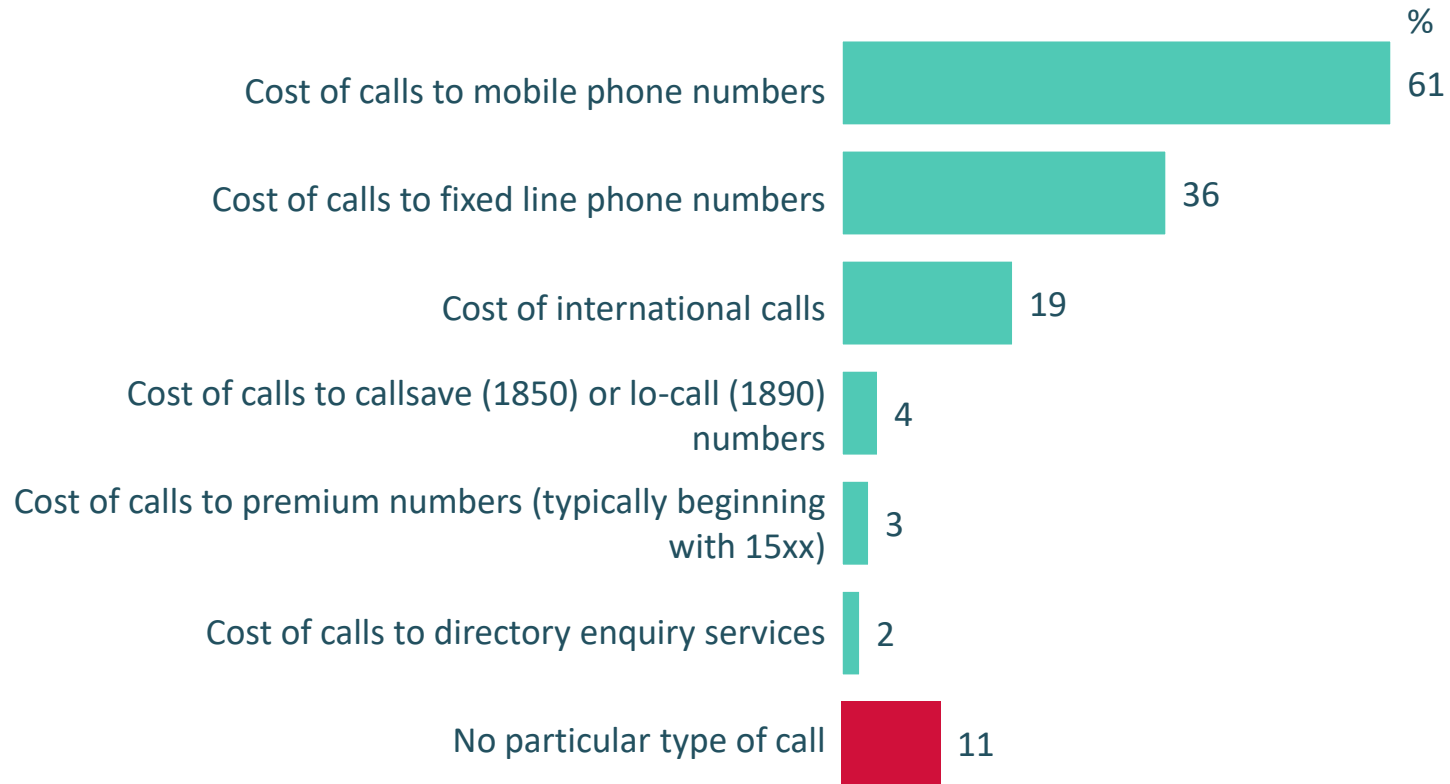
Of SME's surveys in contract less than three years 'Cost of making calls' and 'Trust in brand/supplier' were the main reasons for choosing current fixed line supplier.



Where Cost of Calls is Important Reason to Switch – What Type of Calls Are Important

(Base: All SMEs Choosing Cost Of Making Calls As An Important Factor When Selecting A Provider, n=196)

Q. You mentioned that the **cost of making calls was an important reason** for choosing your current fixed line supplier. Please select the **type of call which was of particular importance** from the following list.?



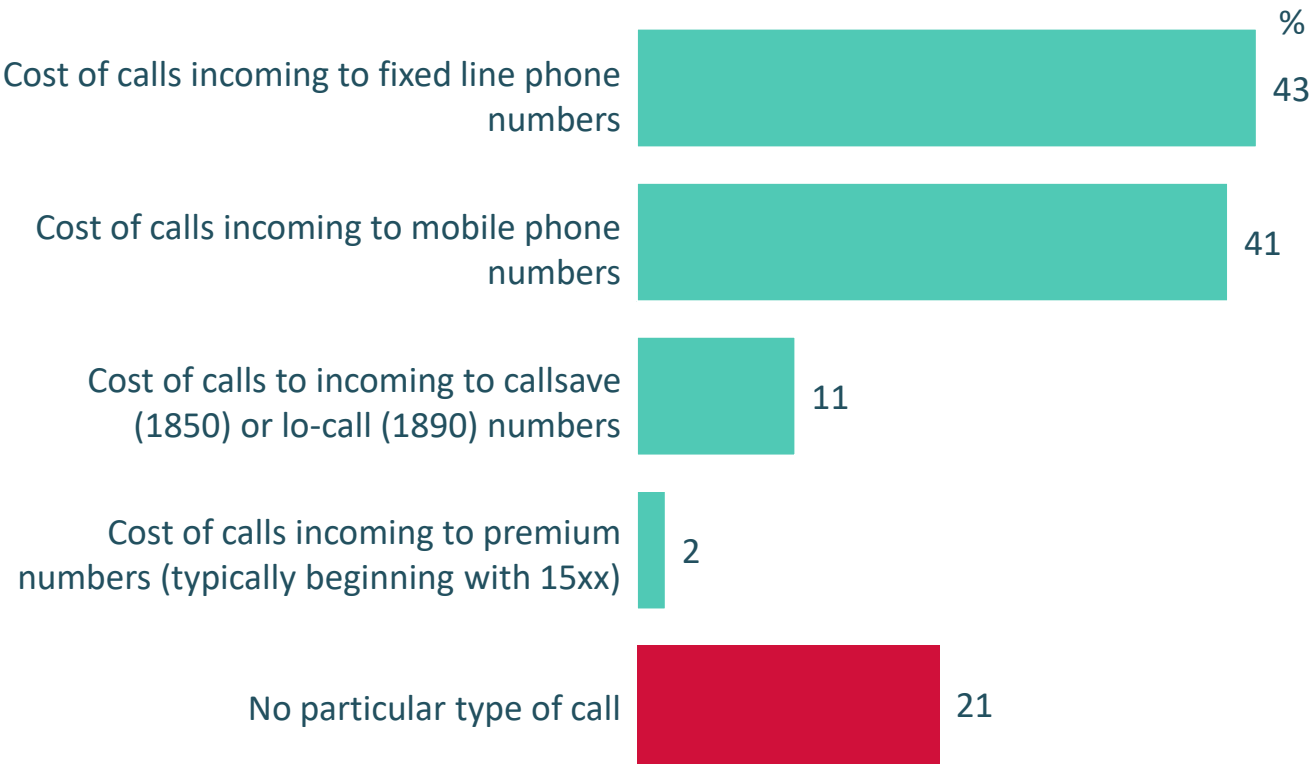
When cost is a factor for selecting new fixed line supplier it is cost of calls to mobile phone numbers that are most important (61%)



When Cost Faced By Others When Calling Business Was Reason For Selecting Current Provider What Types of Calls Were Important?

(Base: All SMEs Choosing Cost Faced By Others As An Important Factor When Selecting A Provider, n=49*)

Q. You mentioned that the **cost of calls faced by others when calling your business was an important reason** when choosing your supplier. Please select the **type of call which was of particular importance** from the following list.?



*Small Base Size

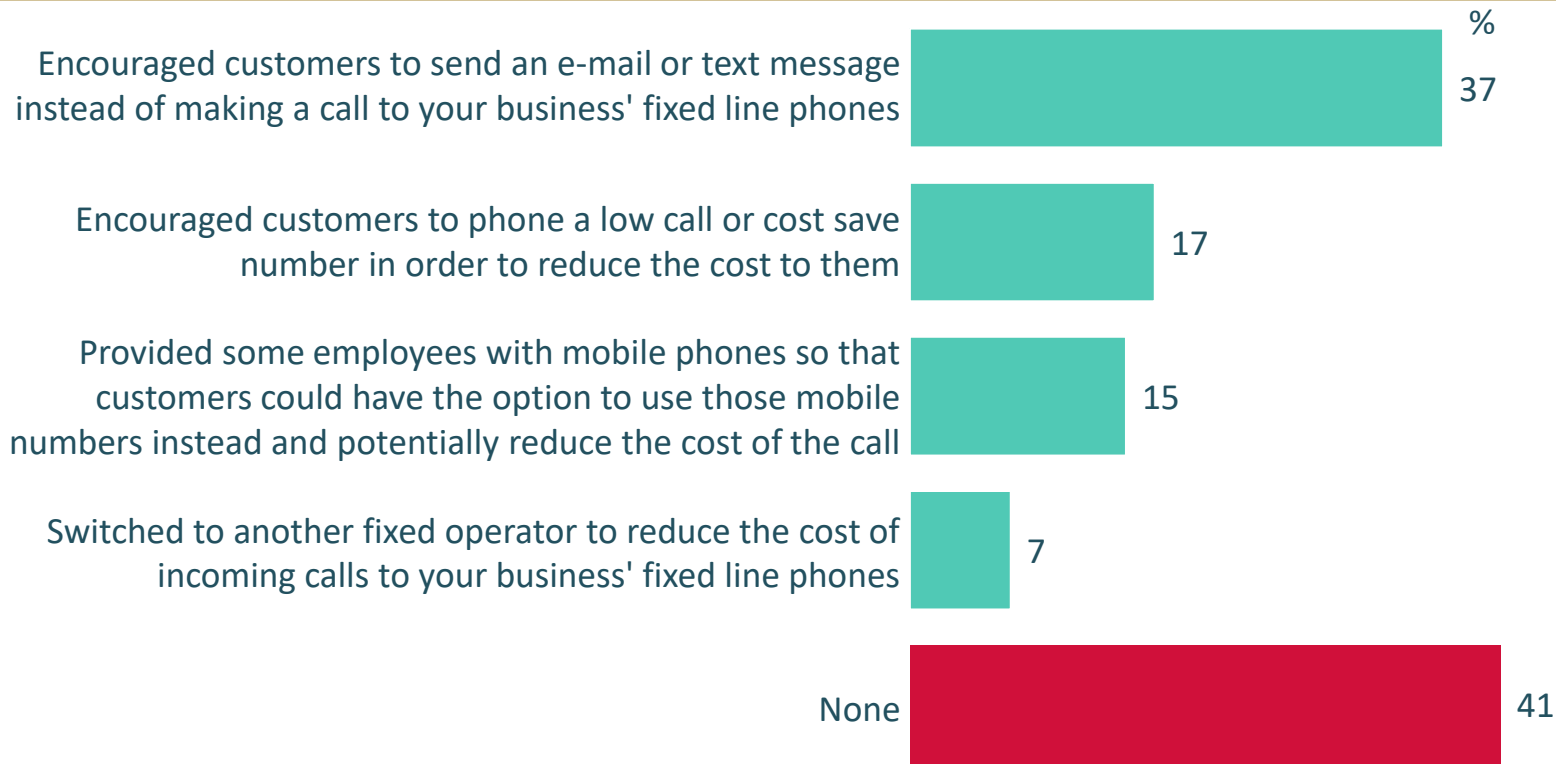
Cost of calls incoming to a companies fixed line (43%) and mobile phone (41%) number were the main concerns regarding this type of cost. However, sample size is too small to warrant any meaningful commentary.



Actions Taken to Reduce the Cost Faced by Others When Calling The Business (Multi Responses Allowed)

(Base: All SMEs Choosing Cost Faced By Others As An Important Factor When Selecting A Provider, n=49*)

Q. In respect of calls incoming to your business' fixed-line phones, has your business ever taken any of the following actions to reduce the costs that people face when calling the business.?



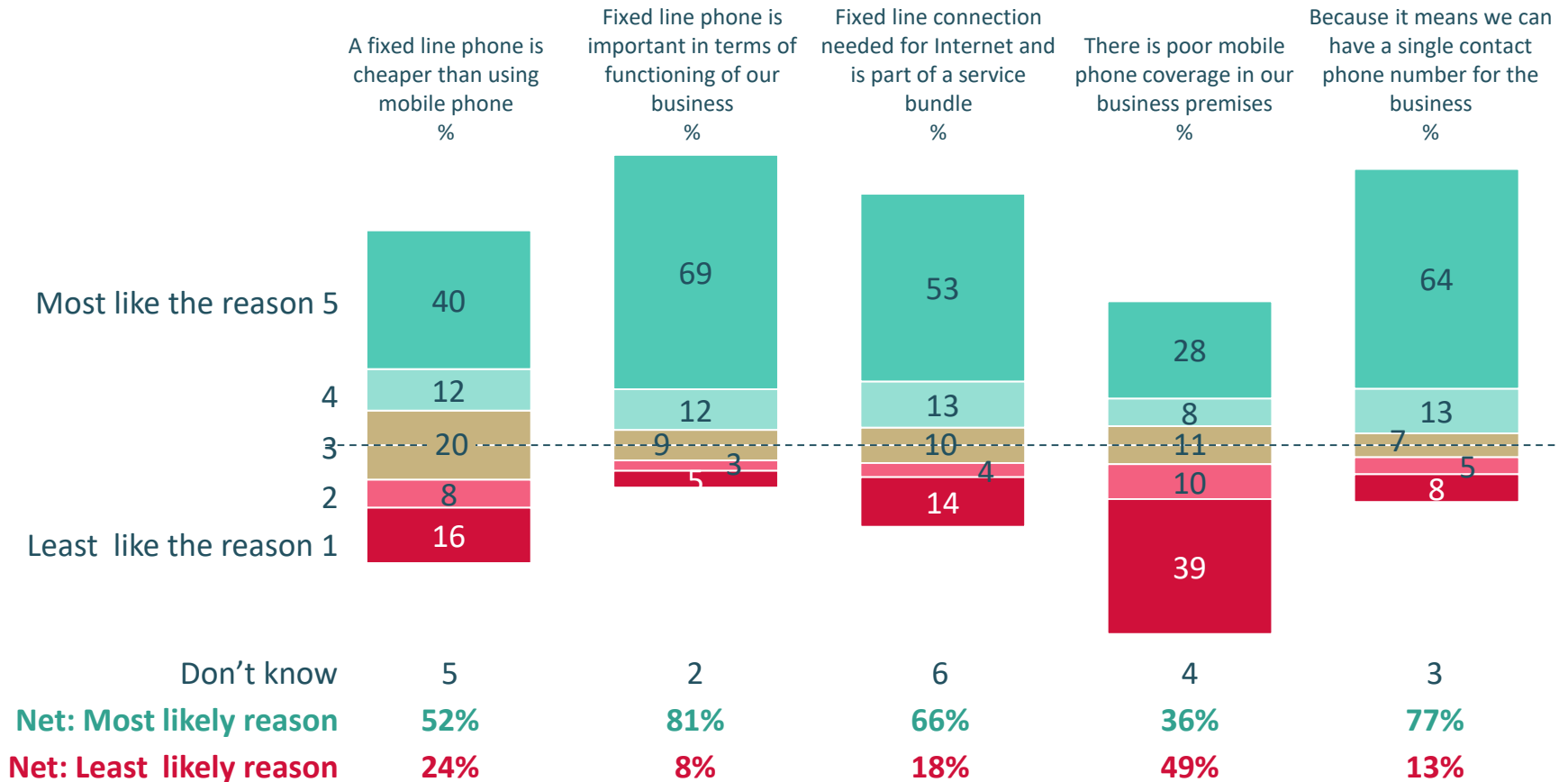
41% of SMEs surveyed reported they have taken no actions in order to reduce the cost burden of calling their business. However, the sample size is too small to warrant any meaningful commentary.



Rating of Reasons for Keeping Fixed line Phone Services

(Base: All SMEs With Fixed Line Phone Service, n=445)

Q. Thinking of the following reasons why you may still have a fixed line phone in your business, please rate the following potential reasons on a **scale of 1 to 5** where 5 is most like **your reason for keeping a fixed line phone in your business** and 1 is least like the reason for keeping a fixed line phone in your business.



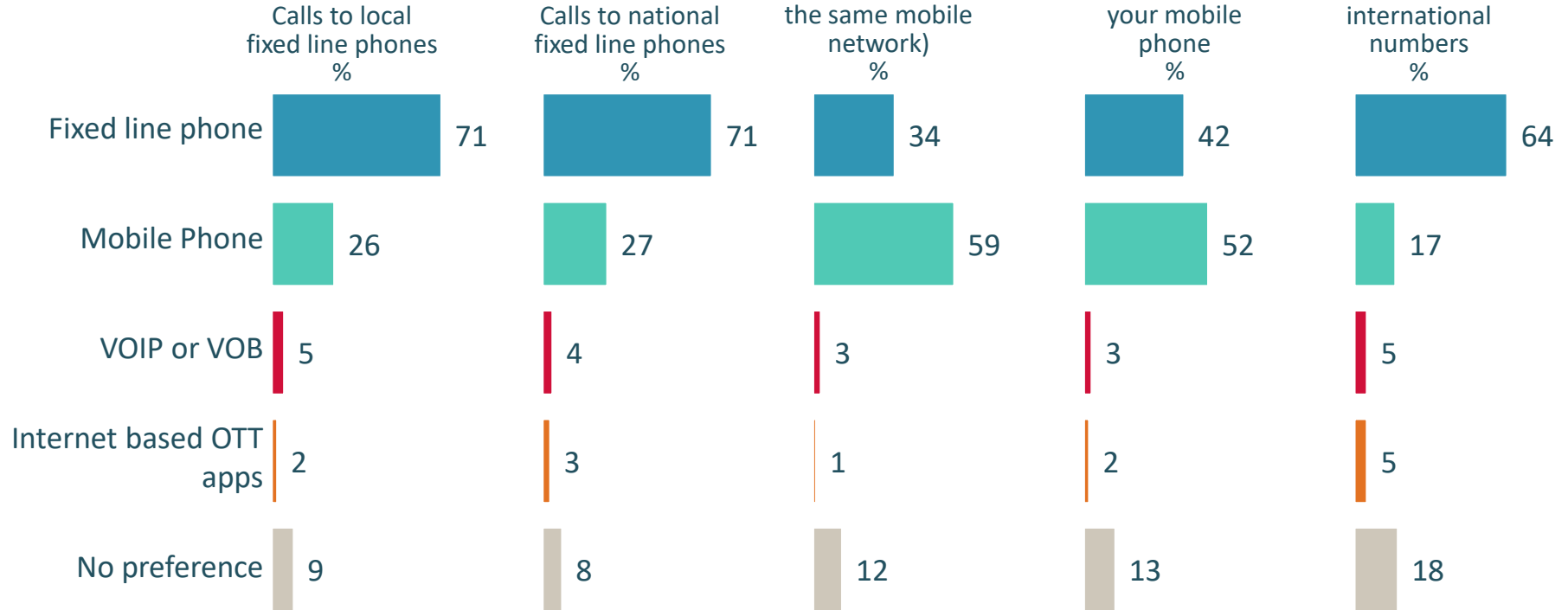
81% of SME businesses surveyed with a fixed line keep the service as it is important to the day to day running of the business. 66% keep fixed line connection as it is needed for internet service while 52% have fixed line as it is cheaper than using a mobile phone



Primary Method Used To Make Following Type of Calls

(Base: All SMEs With More Than 1 Type Of Telecoms Services, n=386)

Q. Thinking about the categories of calls employees make from your business premises, please select what your employees would **primarily use for each of the following types of calls**. If there are several options which your employees would primarily use, please select multiple options



When making local/national calls the primary method used by the businesses surveyed is to use a fixed line phone. When making calls to mobiles the preference is to call a mobile phone on the same network (59%) versus another network (52%)



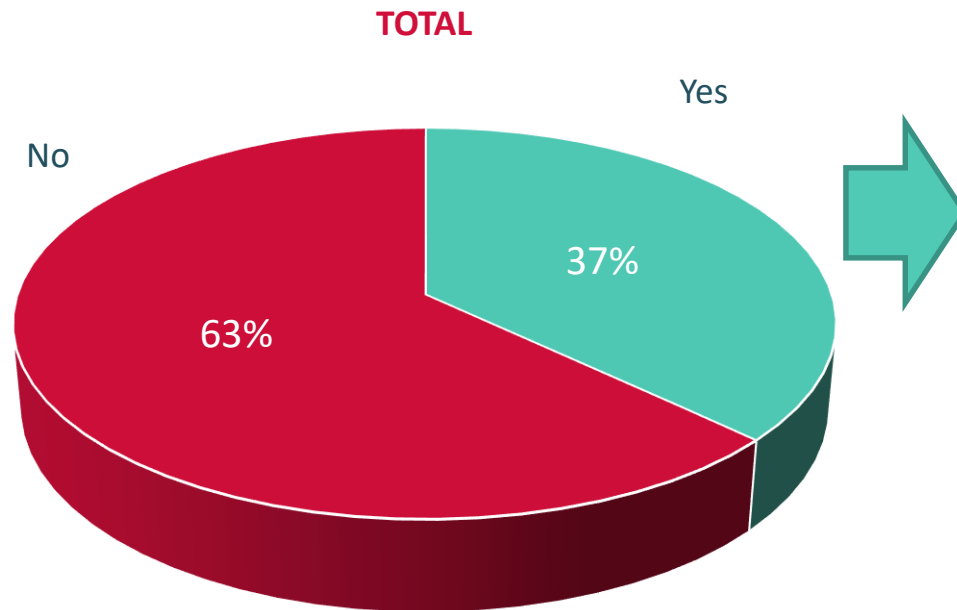


Non-Fixed Line Businesses

Previous Ownership Of Fixed Line Phone

(Base: All SME's Without Fixed Phone Line Service n=55*)

Q. Did you **previously have a fixed line phone** in your business premises?



13% Cancelled Service within past year.
42% of those who previously held a landline cancel for cost reasons

*Small Base Size

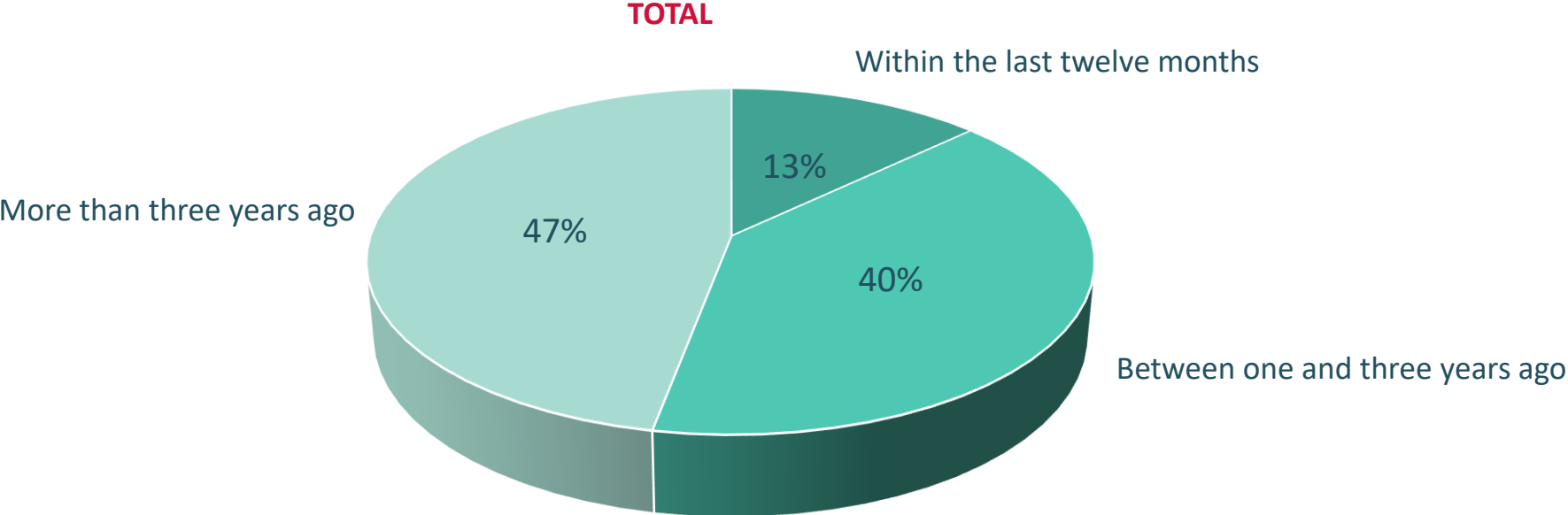
37% of businesses surveyed without a fixed line phone previously owned a fixed line phone in the past. However, sample size is too small to warrant any meaningful commentary.



Length of Time Since Ceasing Fixed Line Service

(Base: All SME's Currently Without Fixed Phone Line Service Who Previously Had One – 20*)

Q. How long ago did you stop having a fixed line phone in your business premises?



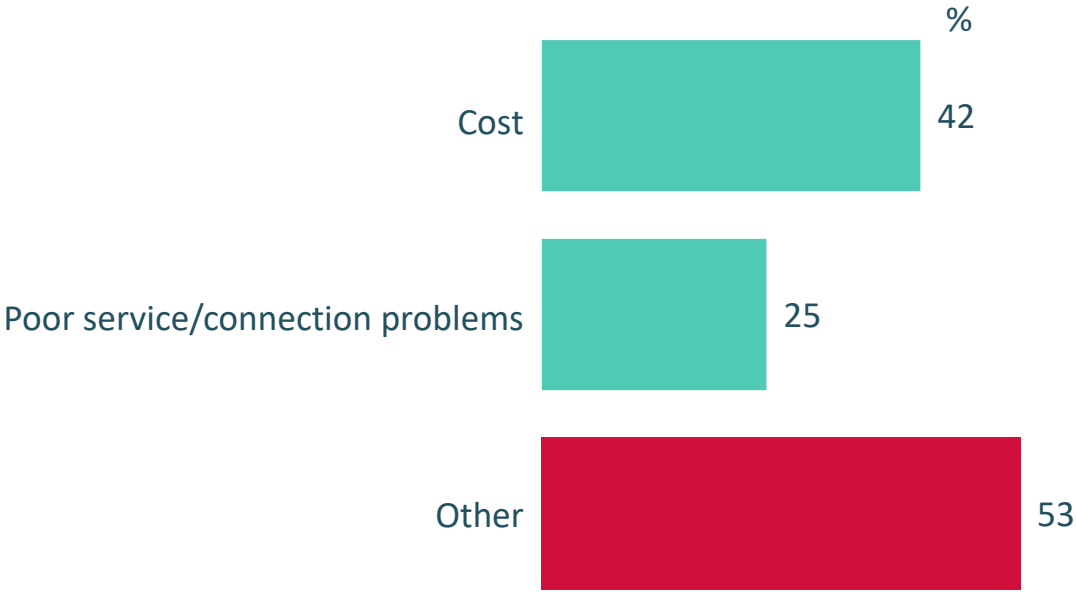
*Sample size is too small to warrant any meaningful commentary.



Reason For Ceasing Fixed Line Service

(Base: All SME's Currently Without Fixed Phone Line Service Who Previously Had One – 20*)

Q. Why don't you have a fixed line phone in your business premises? Any other reason??



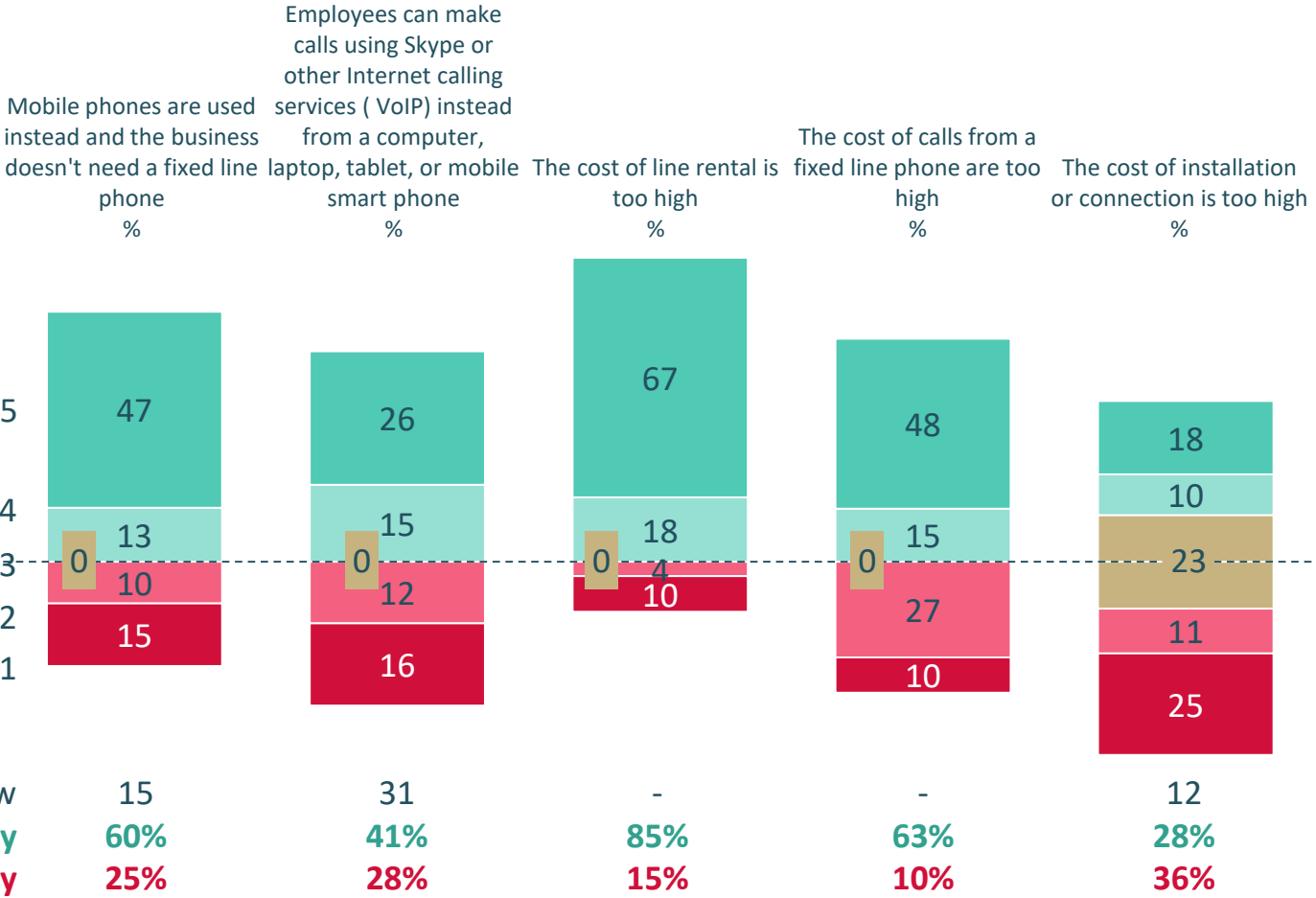
*Sample size is too small to warrant any meaningful commentary.



Ratings Of Reasons For Ceased Fixed Phone Line

(Base: All SMEs currently without fixed phone line service who previously had one – 20*)

Q. For each of the following possible reasons for why you decided to no longer have a fixed line phone in your business premises, please state of on a scale of 1 to 5 where 1 is least like your reason and 5 is most like your reason (or 6 is not applicable)?



(* small base)

Cost of Line Rental is the main reason for ceased fixed phone line, however, sample size is too small to warrant any meaningful commentary.





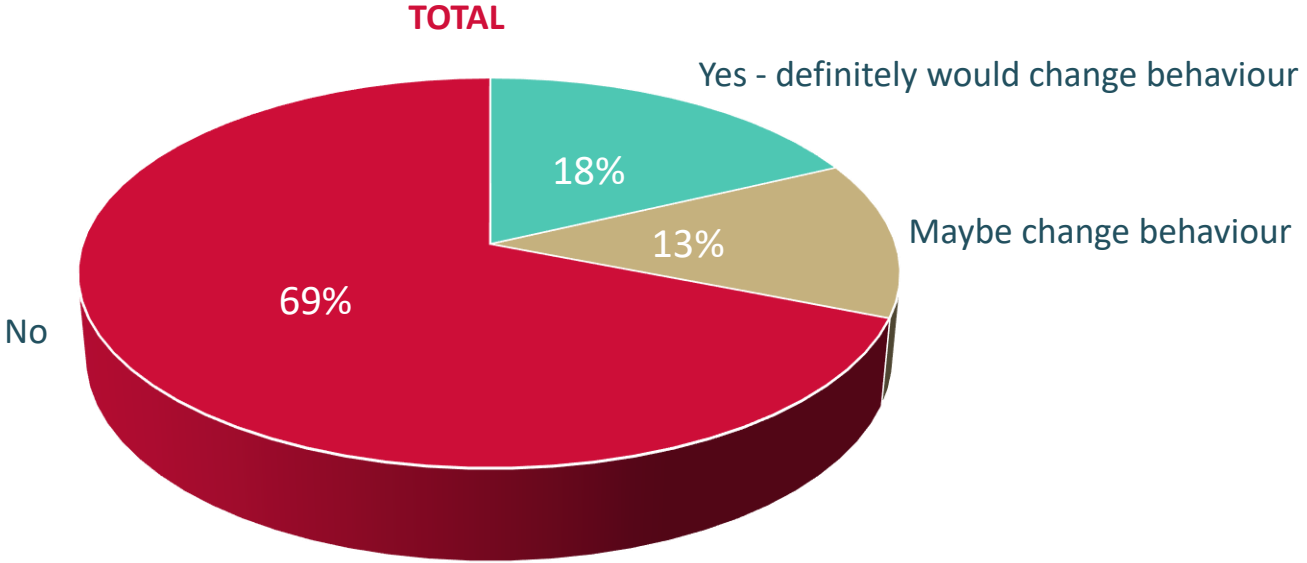
SSNIP (Non Bundle)

If landline calls to landlines on another network increased by

1 cent...

(Base: All SME's With A Fixed Line Phone Outside A Bundle - 201)

Q. Imagine if the **cost of a phone call from your fixed line to other fixed lines** on a different network/different landline provider to you increased by **1 cent per minute**? As a consequence of this **1 cent per minute** increase in the cost of calls from your landline to landlines on a different network, do you believe that you would change your behaviour (including cancelling your bill or potentially switching to an alternative supplier)?



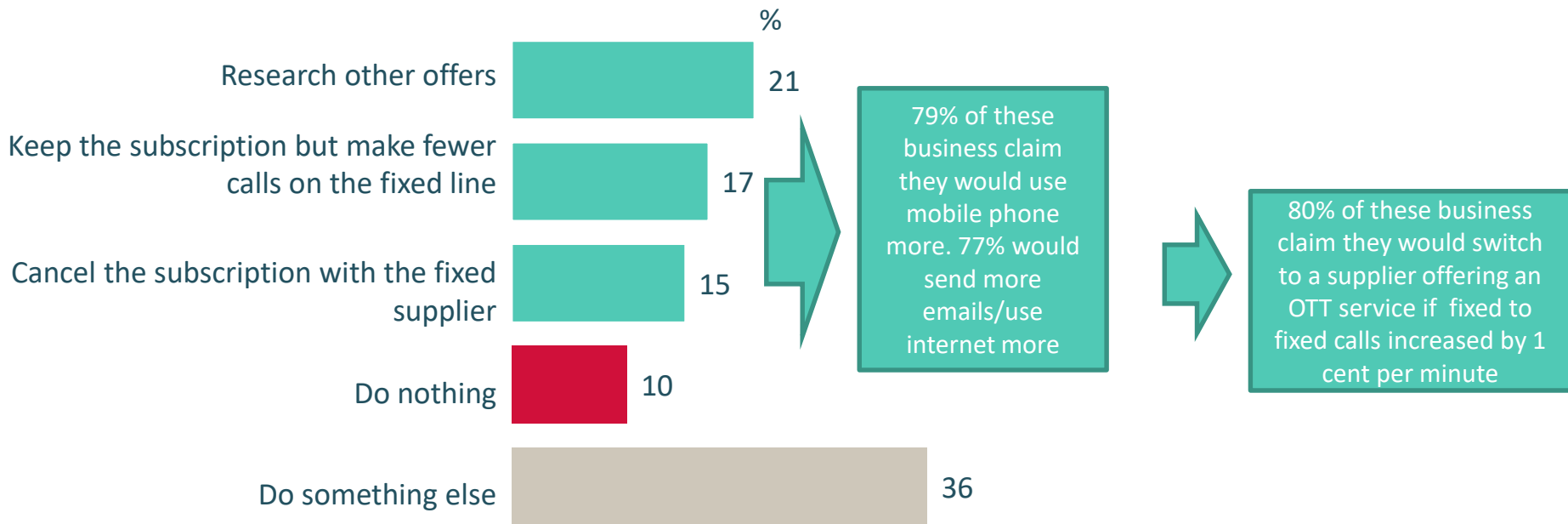
18% of businesses surveyed with a standalone fixed line service claim they would change behaviour based on a 1 cent increase in landline to landline calls on another network.



Most Likely Action As A Result Of 1 Cent Increase In Price Of Fixed To Fixed Calls (All Definitely/Maybe Change Behaviour)

(Base: All SME's Definitely/Maybe Change behaviour as A Result Of 1 Cent Increase In Price Of Fixed To Fixed Calls – 63*)

Q. Which of the following would describe what your business would be **most likely to do**?



*Small Base Size

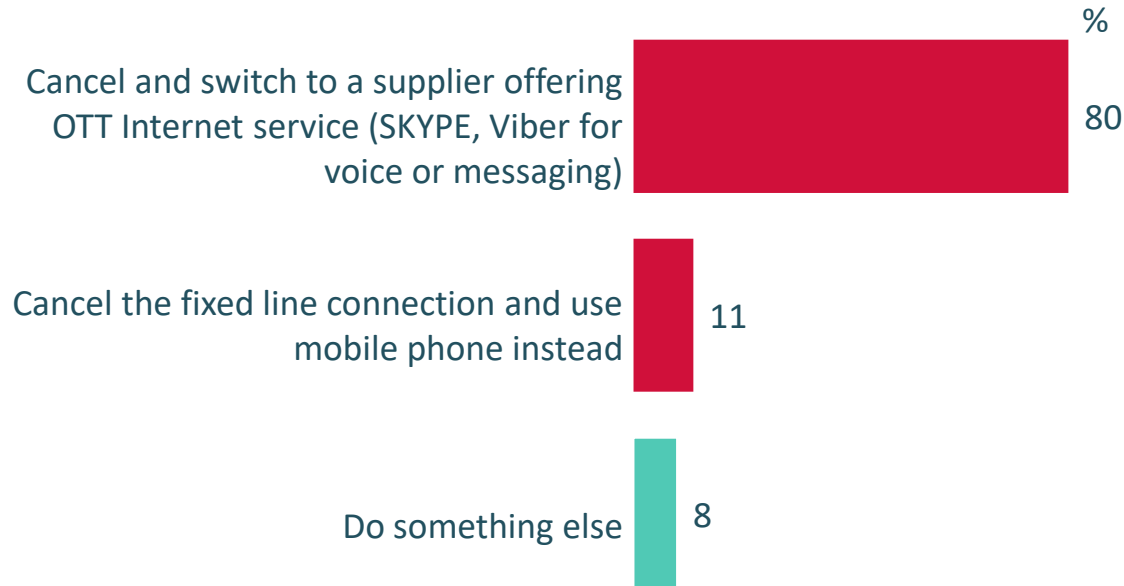
Among the businesses surveyed who may change behaviour given a 1cent increase in price of calls, researching other offer is the most likely action to take (21%). However, the sample size is too small to warrant any meaningful commentary.



Action Instead Of Having Fixed Line

(Base: All SME's Likely To Cancel Fixed Line As Result Of 1 Cent Increase In Price Of Fixed To Fixed Calls -9*)

Q. You have just said that you would **cancel the fixed subscription**. What would your business be most likely to do instead?



*Small Base Size

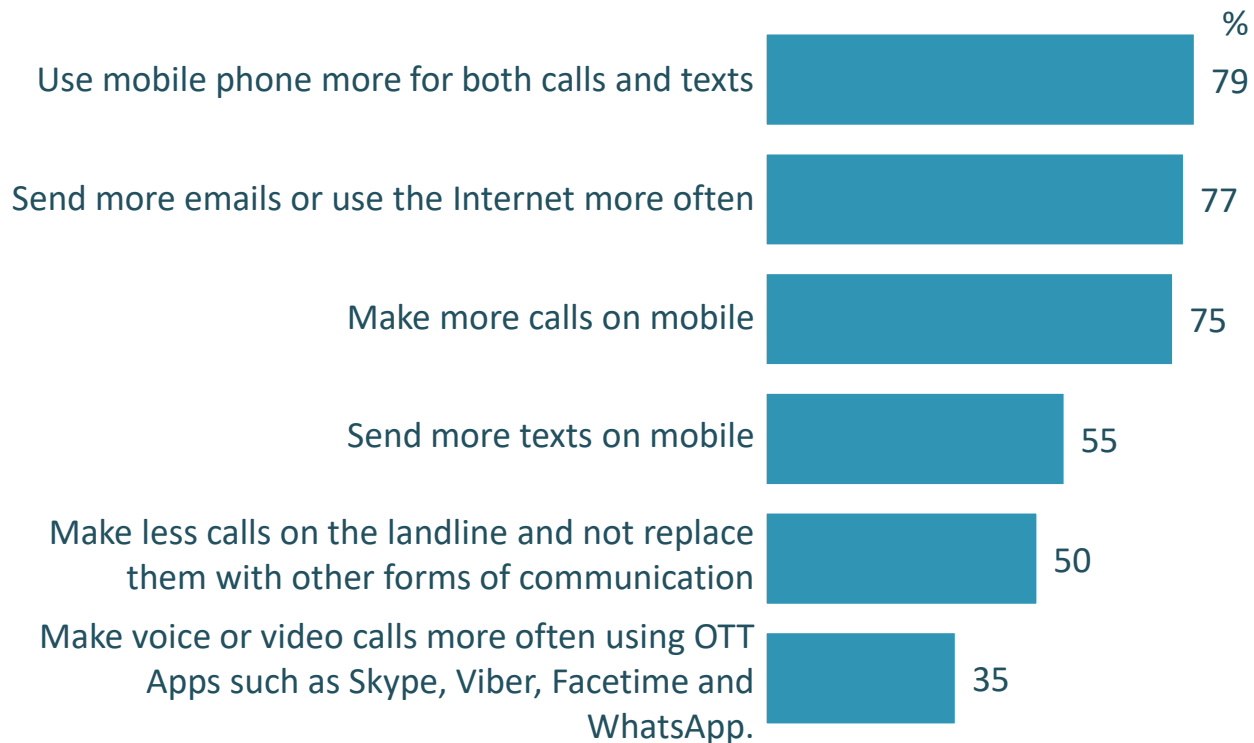
Switching to a OTT internet service is most likely action (80%) taken if a fixed line is cancelled given the increase in call costs. However, the sample size is too small to warrant any meaningful commentary.



Method Of Communicating Instead Of Fixed Line

(Base: All SME's Likely To Cancel/Keep Subscription As A Result Of 1 Cent Increase In Price Of Fixed To Fixed Calls – 17*)

Q. Which of the following would your business do instead? You can select all that apply.



*Small Base Size

Increased use of mobile phone seems the most likely response to a change in fixed line call costs with 79% saying they would use mobile more for calls and text (i.e. SMS). However, the sample size is too small to warrant any meaningful commentary.

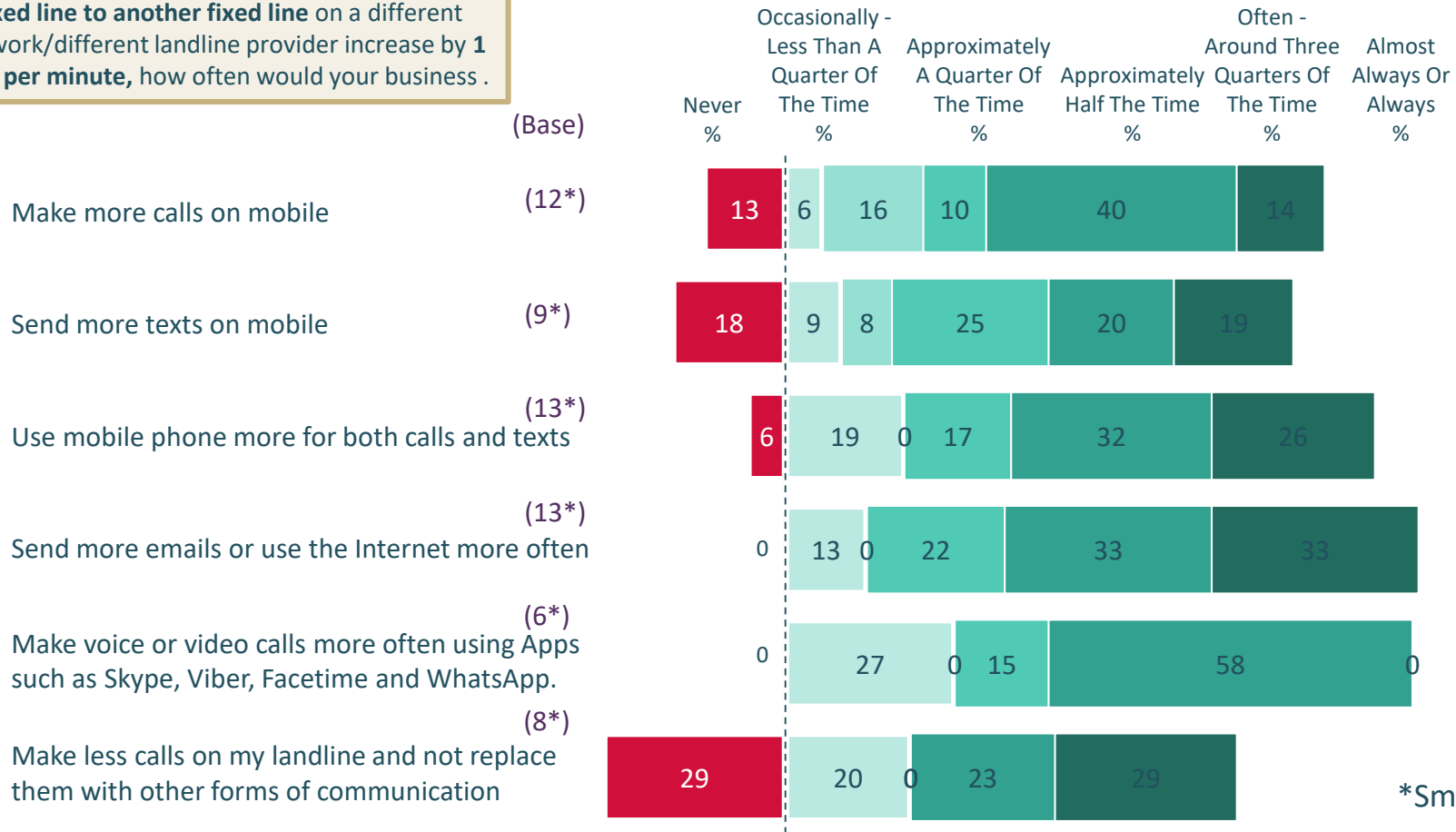


Frequency Of Communicating By Particular Method Stated

Would Use

(Base: All SME's Likely To Take Action As A Result Of 1 Cent Increase In Price Of Fixed To Fixed Calls)

Q. Should the cost of a phone call from your fixed line to another fixed line on a different network/different landline provider increase by 1 cent per minute, how often would your business .



*Small Base Size

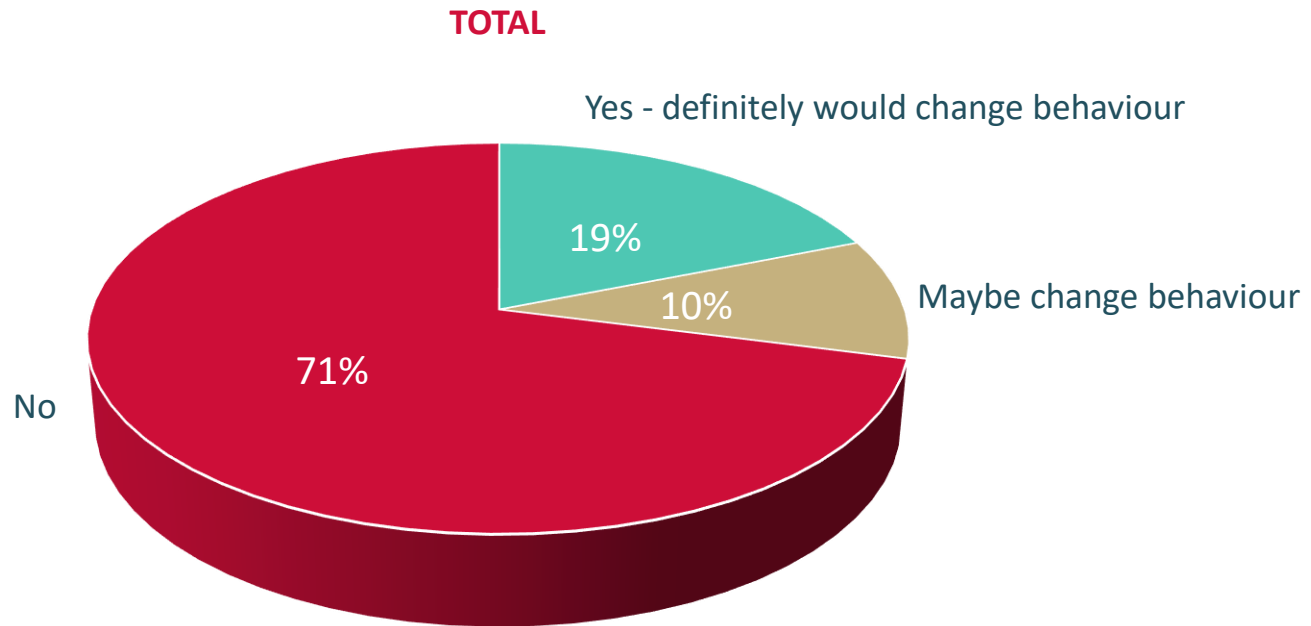
Sample size is too small to warrant any meaningful commentary.



If Fixed Line to Mobile Price Increased By 1 Cent Per Minute ...

(Base: All SME's With A Fixed Line Phone Outside Of Bundle - 201)

Q. Imagine if the **cost of a phone call from your fixed line to a mobile phone** increased by **1 cent per minute**?



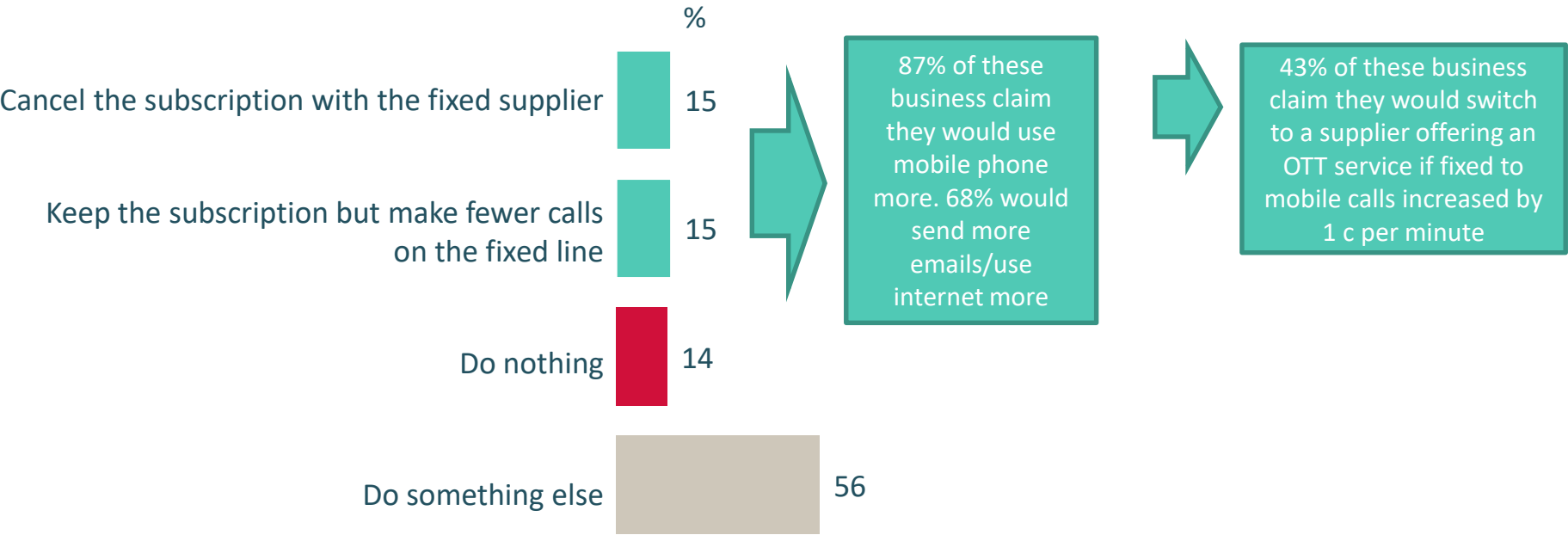
19% of businesses surveyed say they will definitely change behaviour if price of call from fixed to mobile phone increases by 1 cent per minute.

REDC

Most Likely Action As A Result Of 1 Cent Increase In Price Of Fixed To Mobile Calls (Definitely/Maybe Change Behaviour)

(Base: All SME's Definitely/Maybe Change Behaviour As A Result Of 1 Cent Increase In Price Of Fixed To Mobile Calls – 57*)

Q. Which of the following would describe what your business would be **most likely to do**?



*Small Base Size

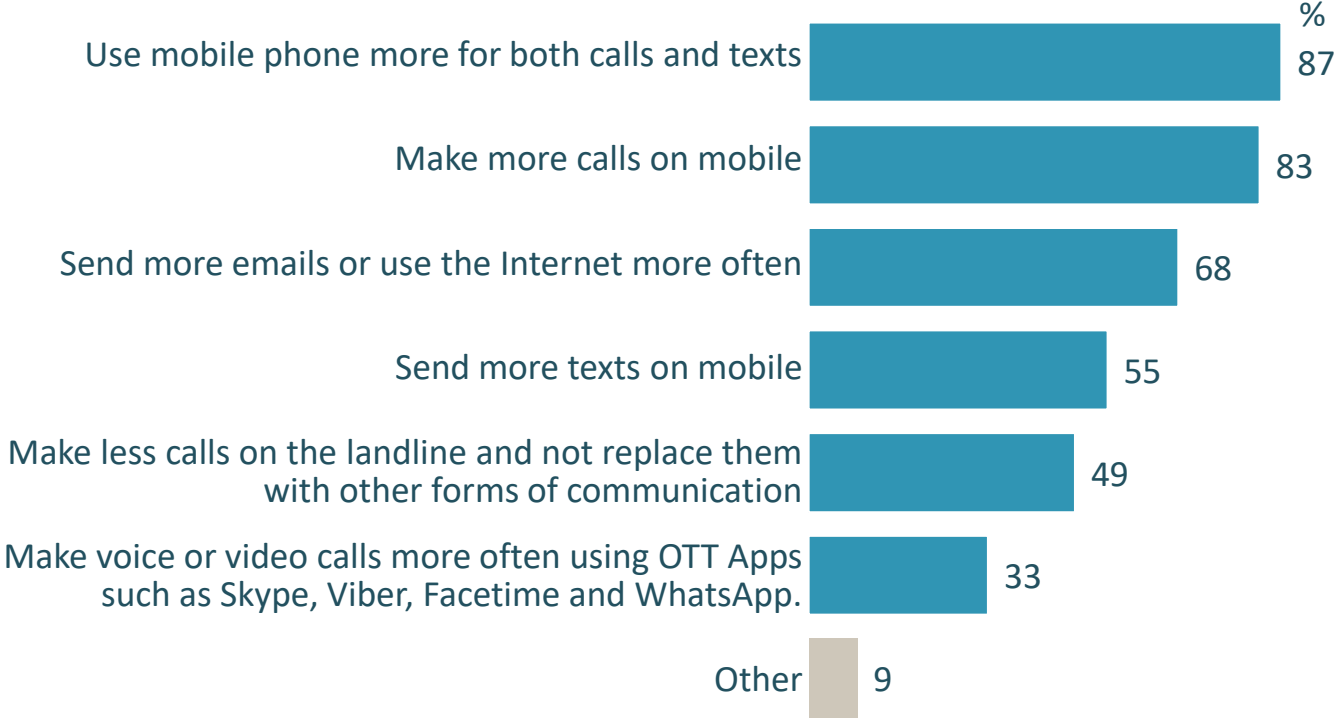
Just 15% of SME's surveyed that are likely to change behaviour claim the are likely to cancel subscription with fixed line supplier.



Action Business Likely to Take If Cancel/Switch Fixed Line

(Base: All SME's Likely To Take Cancel/Keep As A Result Of 1 Cent Increase In Price Of Fixed To Mobile Calls – 16*)

Q. Which of the following would your business do instead? You can select all that apply.



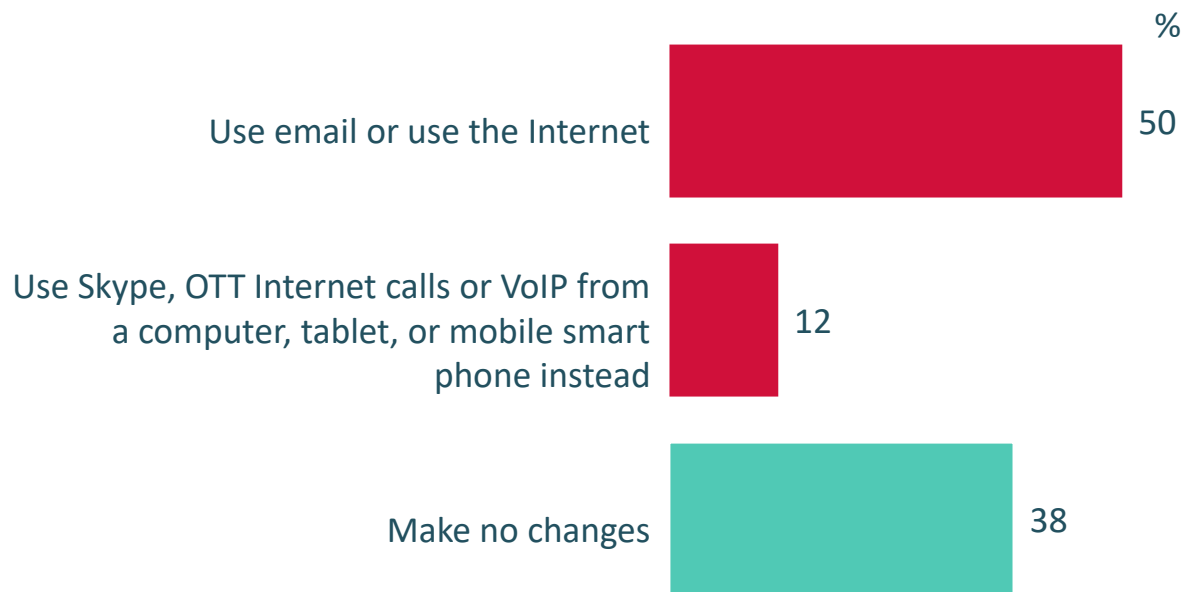
*Small Base Size

Sample size is too small to warrant any meaningful commentary.



Implication If Mobile To Mobile Calls Also Increased By 1 Cent

(Base: All SME's using mobile as results of increased in fixed cost – 21*)



*Small Base Size

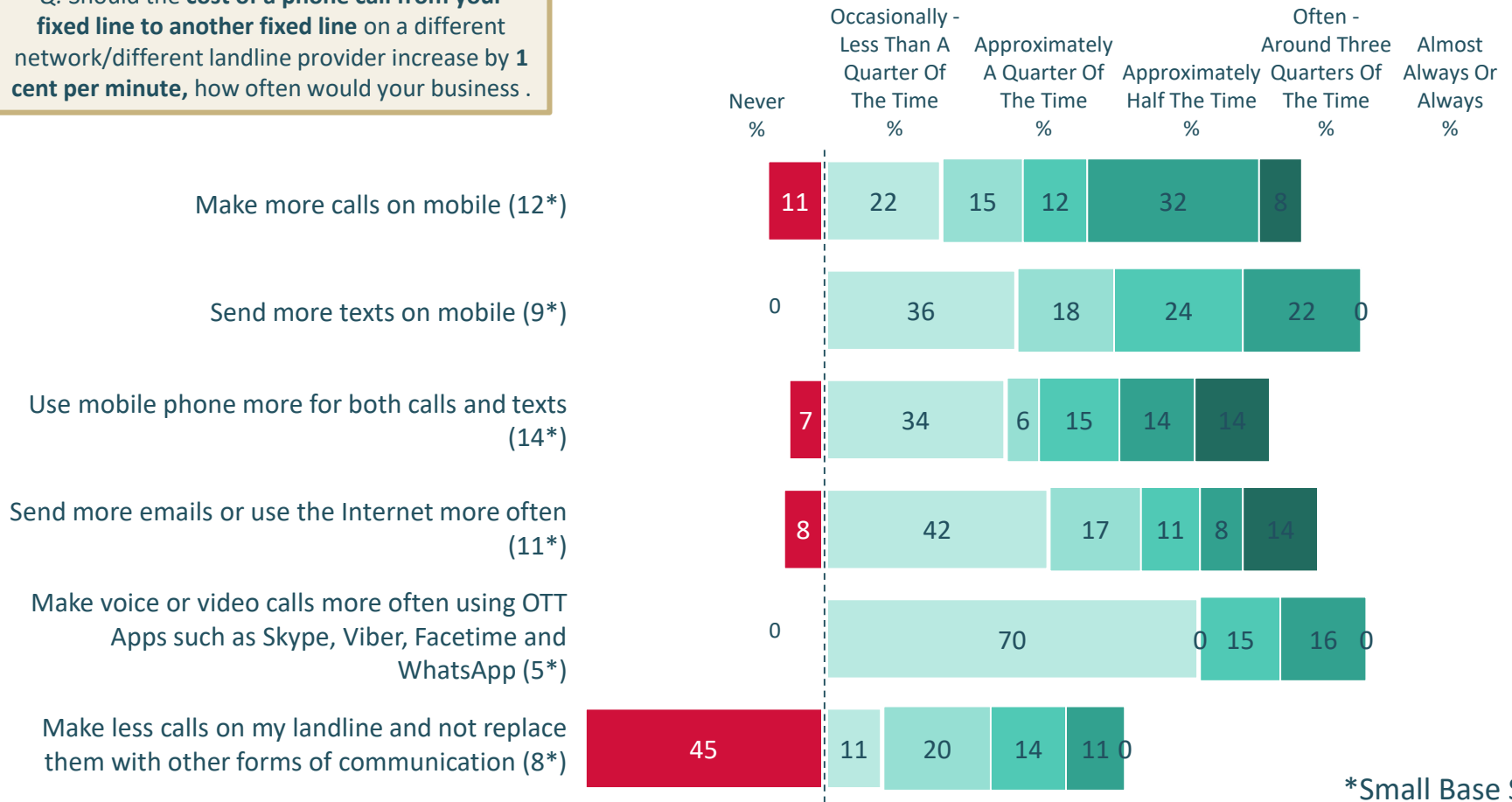
Sample size is too small to warrant any meaningful commentary.



If cost of Fixed Line Call Increases How Often Would Business Do Each of the Following

(Base: All SME's Likely To Take Action As A Result Of 1 Cent Increase In Price Of Fixed To Fixed Calls)

Q. Should the cost of a phone call from your fixed line to another fixed line on a different network/different landline provider increase by 1 cent per minute, how often would your business .



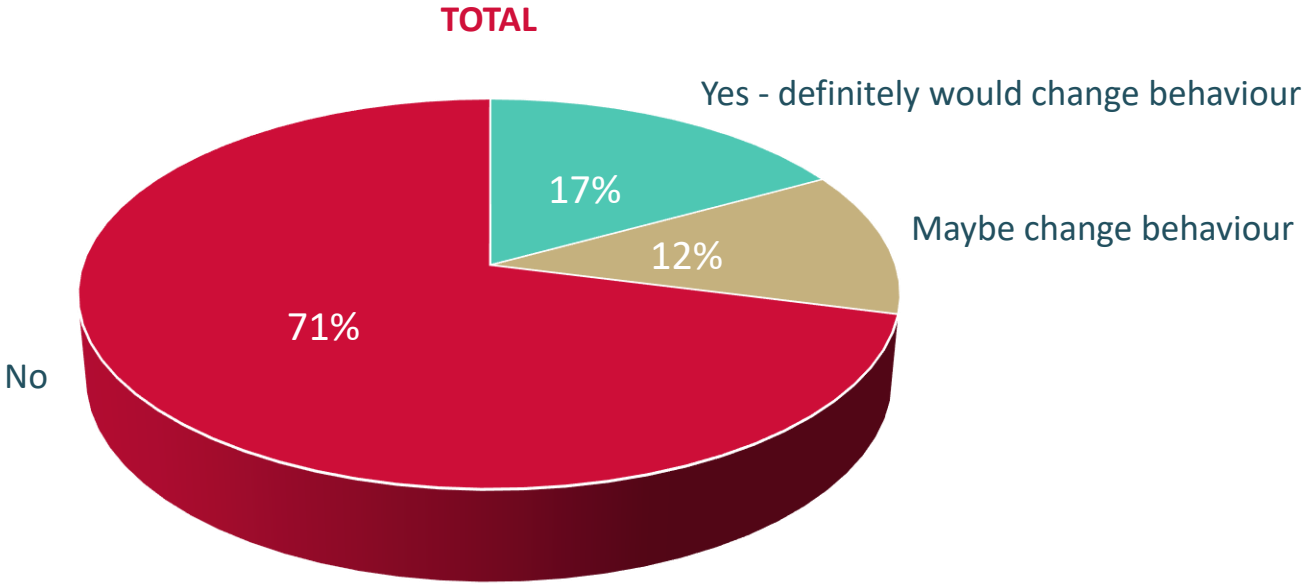
*Small Base Size

Rate of increased calls to mobile given price increase in fixed is relatively high at 40% saying they would do this three quarters of the time or more often. However, sample size is too small to warrant any meaningful commentary.



If Fixed to Fixed (Different Network) Increased by 1 Cent Per Minute (Bundle) (Base: All SME's With A Fixed Line Phone In Bundle - 243)

Q. Imagine if the **cost of a phone call from your fixed line to other fixed lines** on a different network/different landline provider to you increased by **1 cent per minute**?



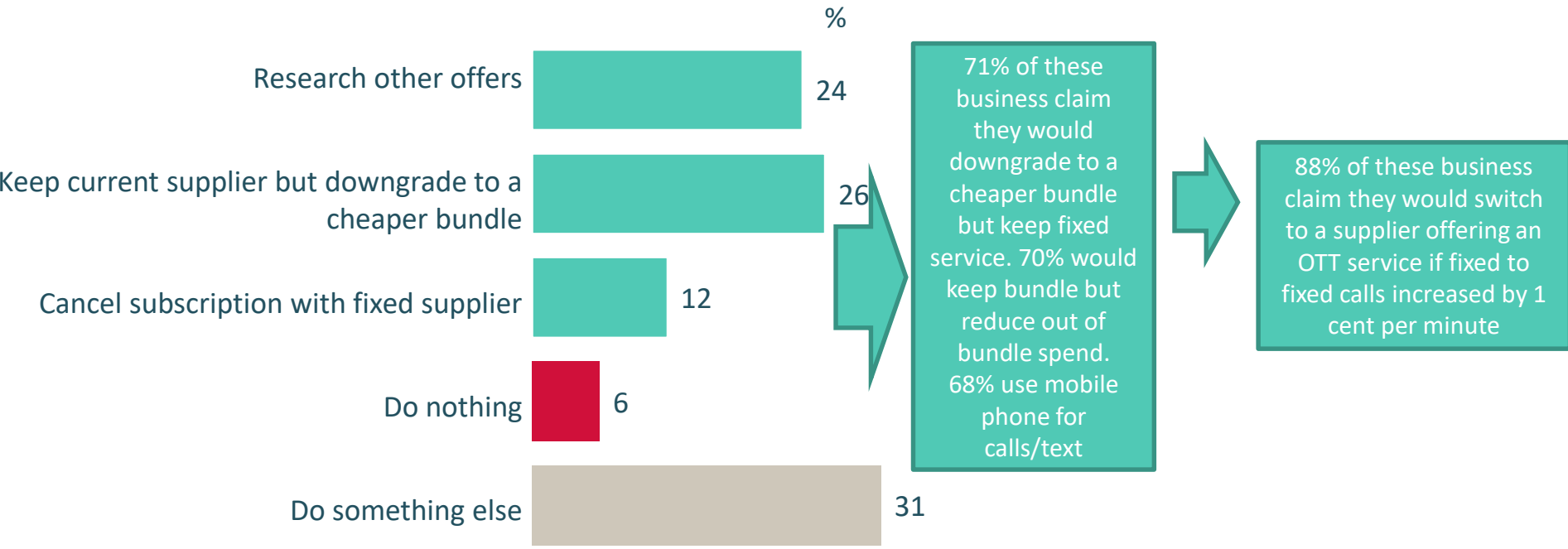
17% of business surveyed with a bundle say they would change behaviour if the price of fixed to fixed calls increased by 1 cent per minute.



Most Likely Action As A Result Of 1 Cent Increase In Price Of Fixed To Fixed Calls – Bundle (Definitely/Maybe Change Behaviour)

(Base: All SME's Definitely/Maybe Change Behaviour result Of 1 Cent Increase In Price Of Fixed To Fixed Calls In Bundle - 70)

Q. Which of the following would describe what your business would be **most likely to do**?



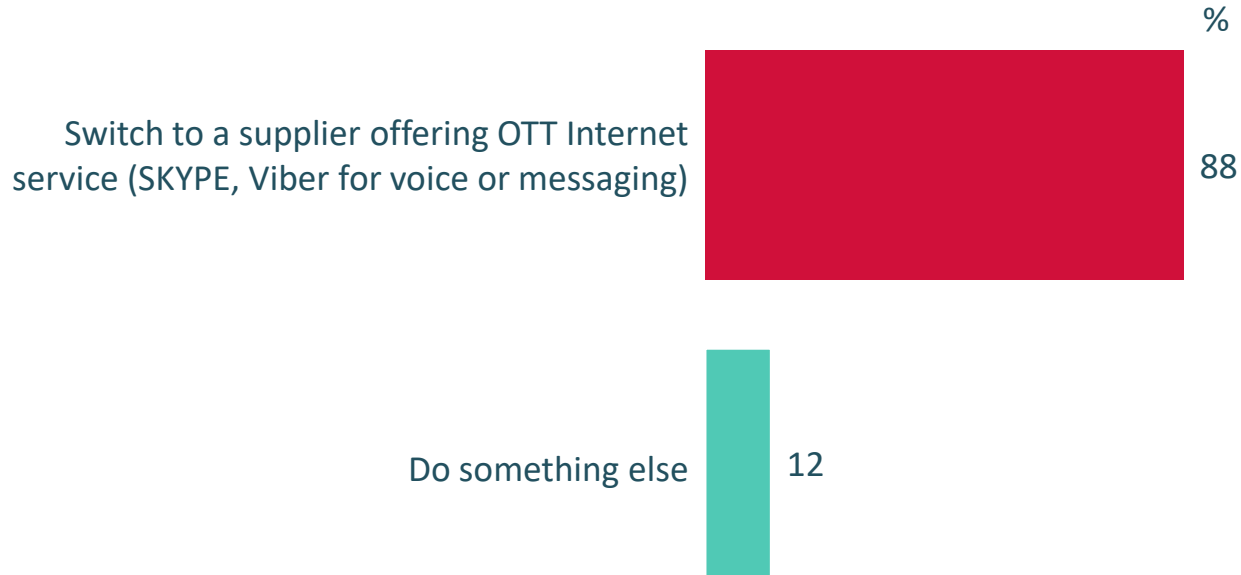
26% of those likely to change behaviour given 1 cent increase say they would keep current supplier but downgrade to a cheaper bundle.



Method Of Communicating If Fixed Line Is Cancelled

(Base: All SME's Likely To Cancel As A Result Of 1 Cent Increase In Price Of Fixed To Fixed Calls In Bundle – 9*)

Q. You have just said that you would **cancel the fixed subscription**. What would your business be most likely to do instead?



*Small Base Size

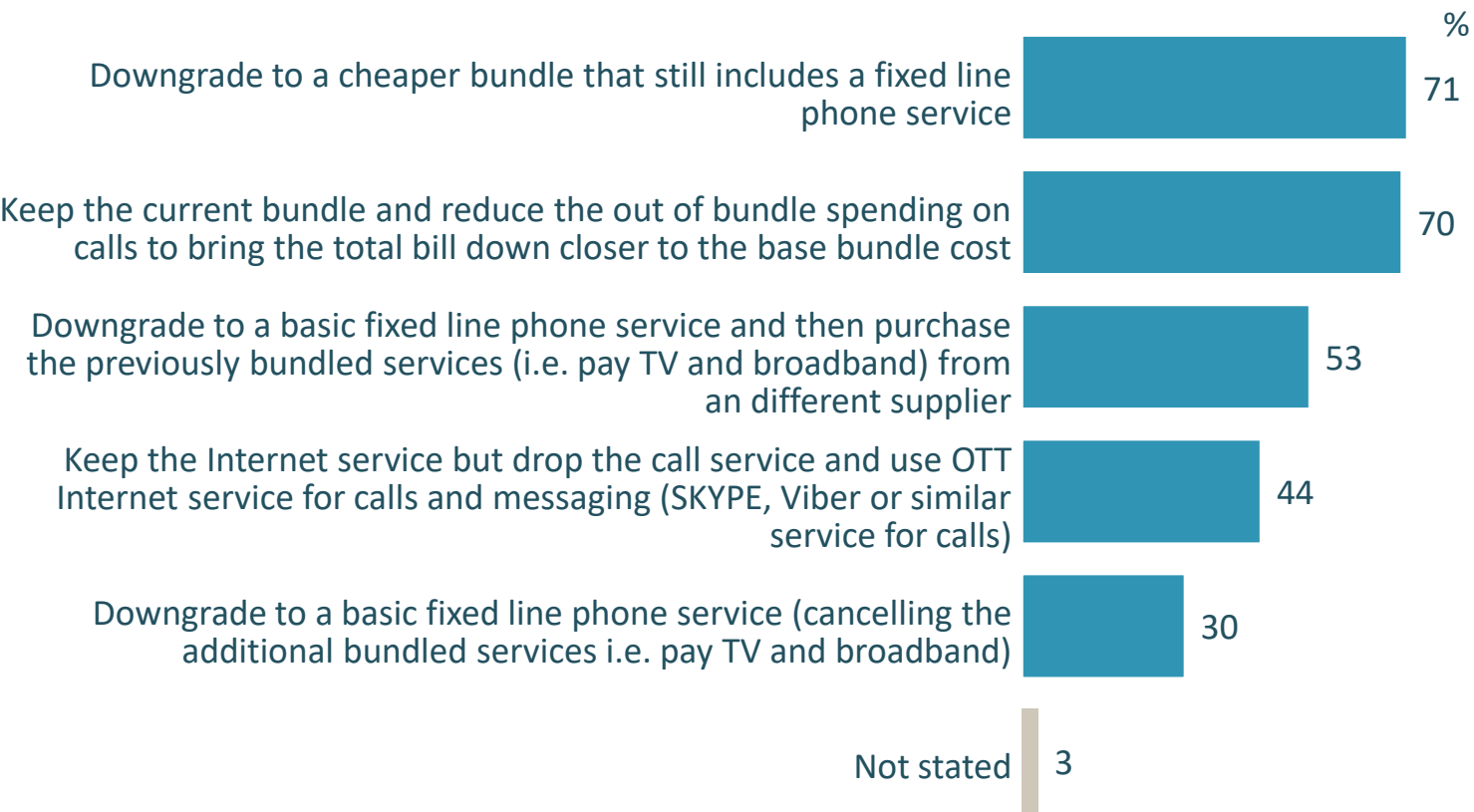
Sample size is too small to warrant any meaningful commentary.



Action Business Likely to Take If Cancel/Switch Fixed Line

(Base: All SME's Likely To Cancel/keep As A Result Of 1 Cent Increase In Price Of Fixed To Fixed Calls In Bundle, n=27*)

Q. Which of the following would your business do instead? You can select all that apply.



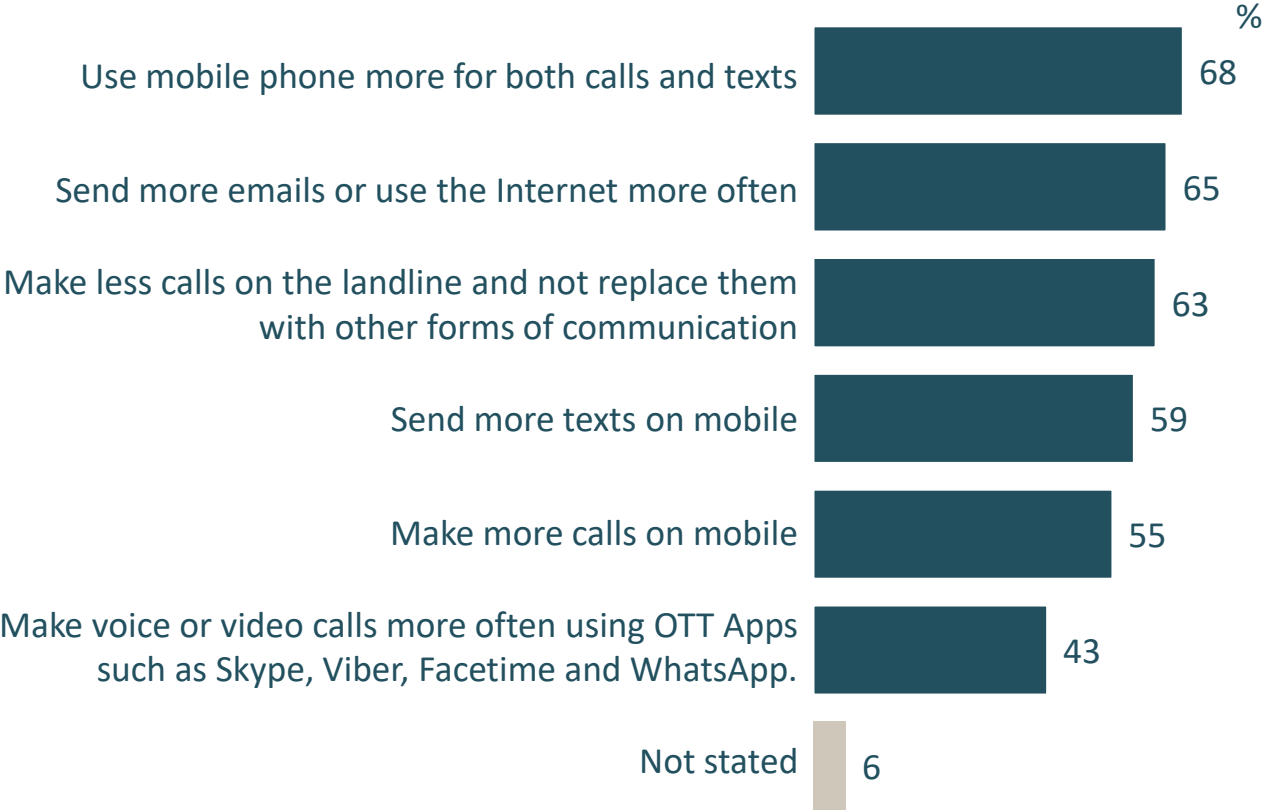
*Small Base Size

Among business who are likely to cancel/switch bundle majority are likely to downgrade to a cheaper bundle (71%) or reduce out of bundle spend (70%). However, the sample size is too small to warrant any meaningful commentary.



Action Likely to Take If Cancel/Switch Fixed Line Service (Bundle)

(Base: All SME's Likely To Cancel/Keep As A Result Of 1 Cent Increase In Price Of Fixed To Fixed Calls In Bundle, n=27*)



*Small Base Size

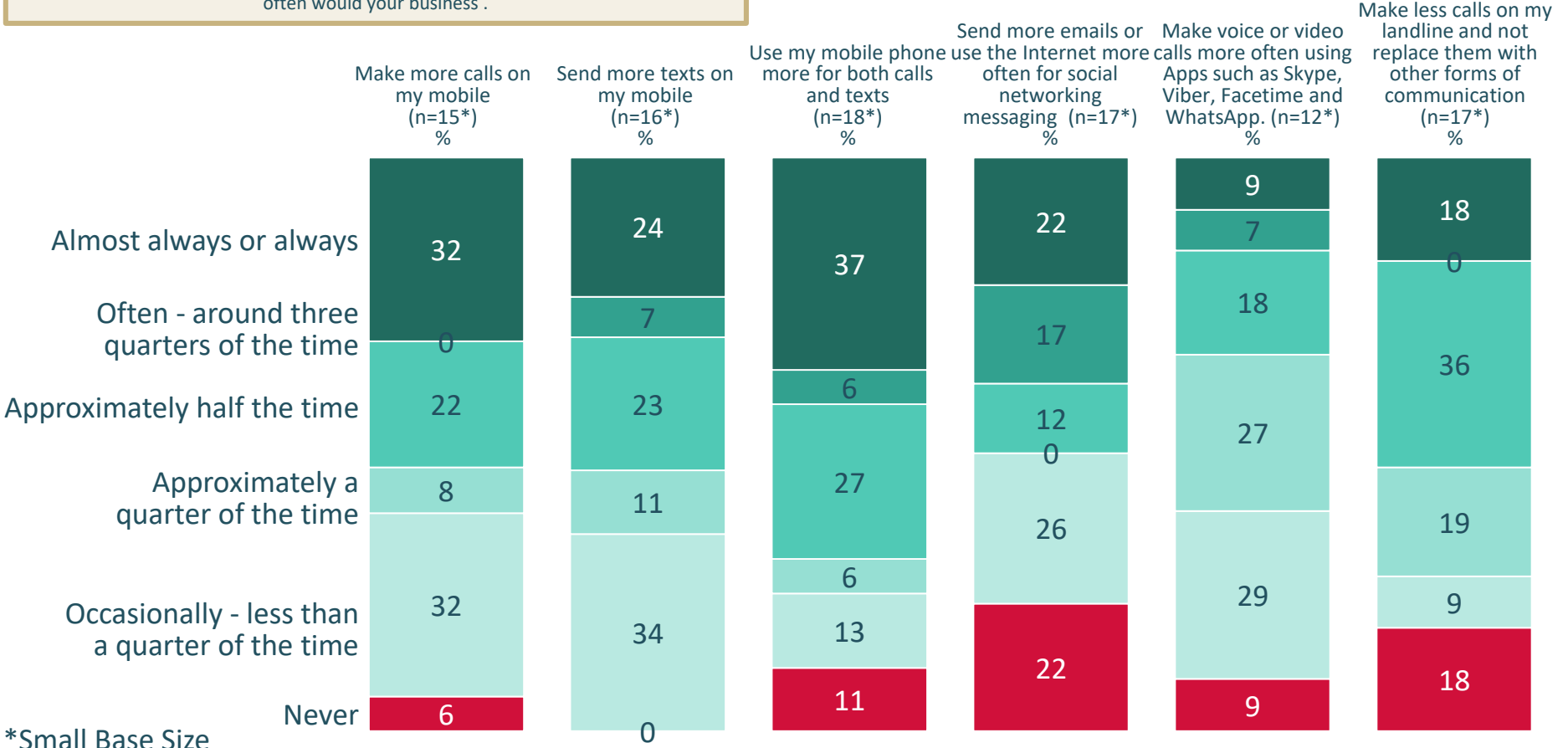
Use of mobile phone most likely action to take (68%) followed closely by using email/internet more often (65%) among the businesses surveyed who would cancel or keep their service based on the call charge increase. However, sample size is too small to warrant any meaningful commentary.



If cost of Fixed Line Call Increases How Often Would Business Do Each of the Following

(Base: All SMEs Likely To Take Action As A Result Of 1cent Increase In Price Of Fixed To Fixed Calls In Bundle)

Q. Should the cost of a phone call from your fixed line to another fixed line on a different network/different landline provider increase by 1 cent per minute, how often would your business .



*Small Base Size

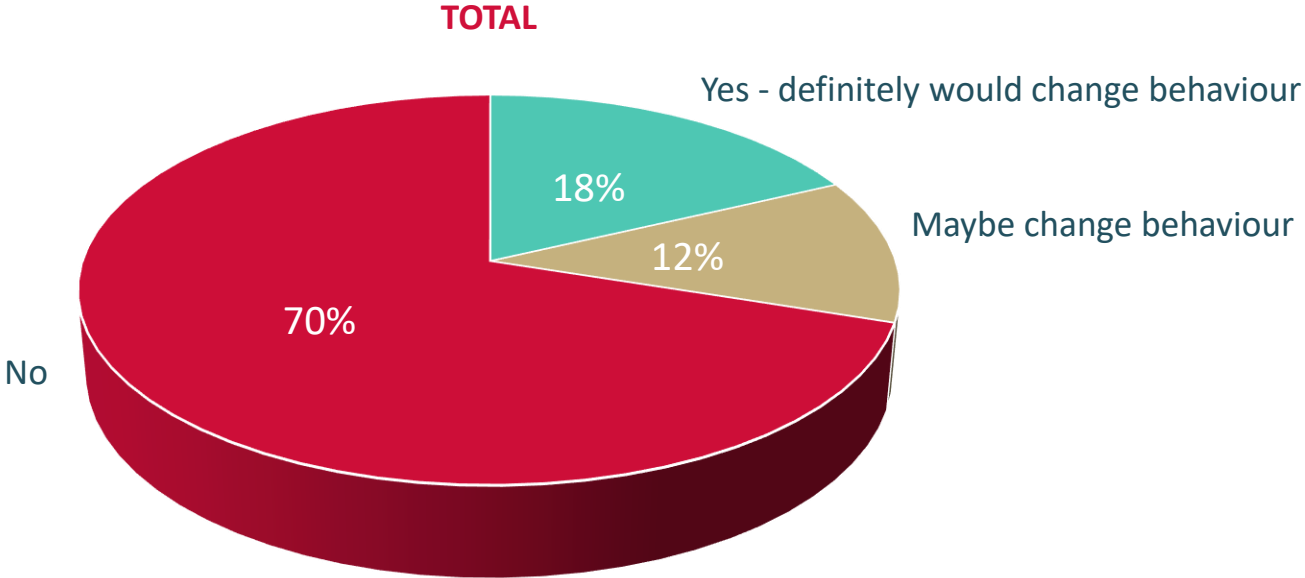
Among the businesses survey who think they will conduct each activity claimed frequency of use of mobile phone is higher than other methods likely to use if price of fixed line increases by 1 cent per minute. However, the sample size is too small to warrant any meaningful commentary.



If Fixed to Mobile Increased by 1 cent Per Minute (Bundle)...

(Base: All SME's With Fixed Services In A Bundle, n=243)

Q. Imagine if the cost of a phone call from your fixed line to a mobile phone increased by 1 cent per minute?



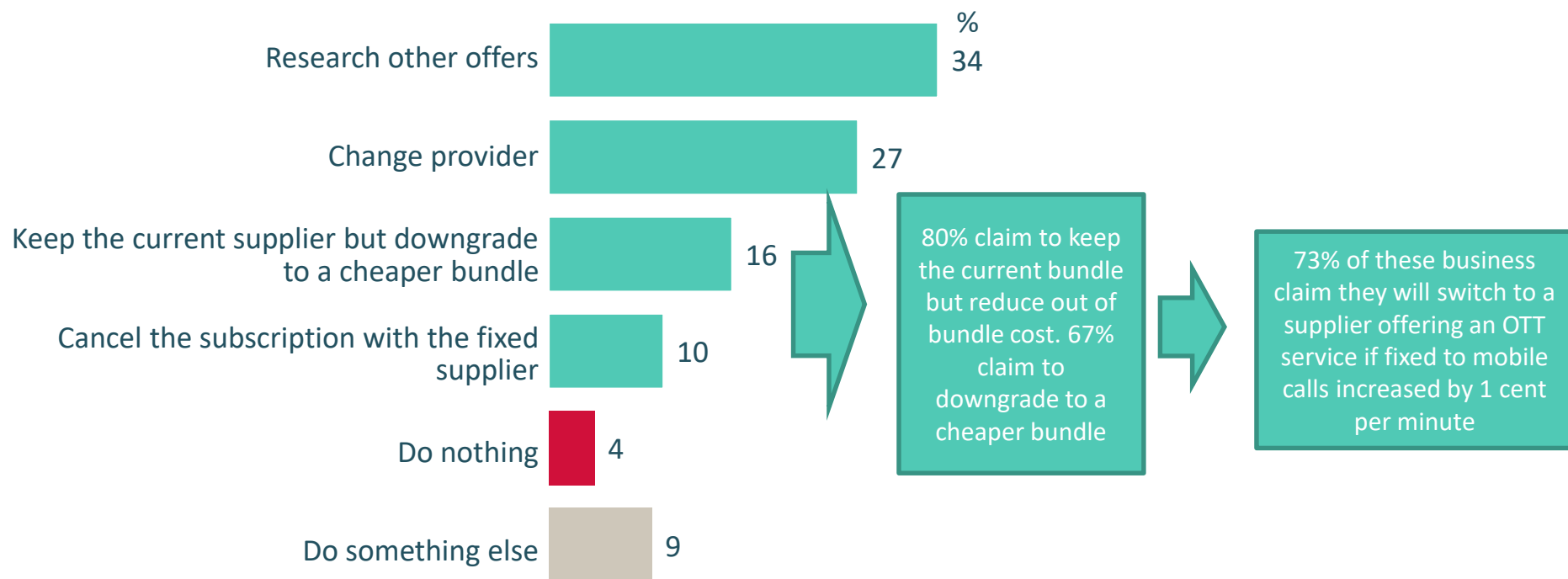
18% of business state they will change behaviour if price of fixed to mobile calls increase by 1 cent per minute.



Most Likely Action as a Result of 1cent Increase in Price of Fixed to Mobile Calls (Definitely/Maybe Change Behaviour)

(Base: All SME's Definitely/Maybe Change Behaviour Action Due to 1 c increase, n=72)

Q. You have just said that you would **cancel the fixed subscription**. What would your business be most likely to do instead?



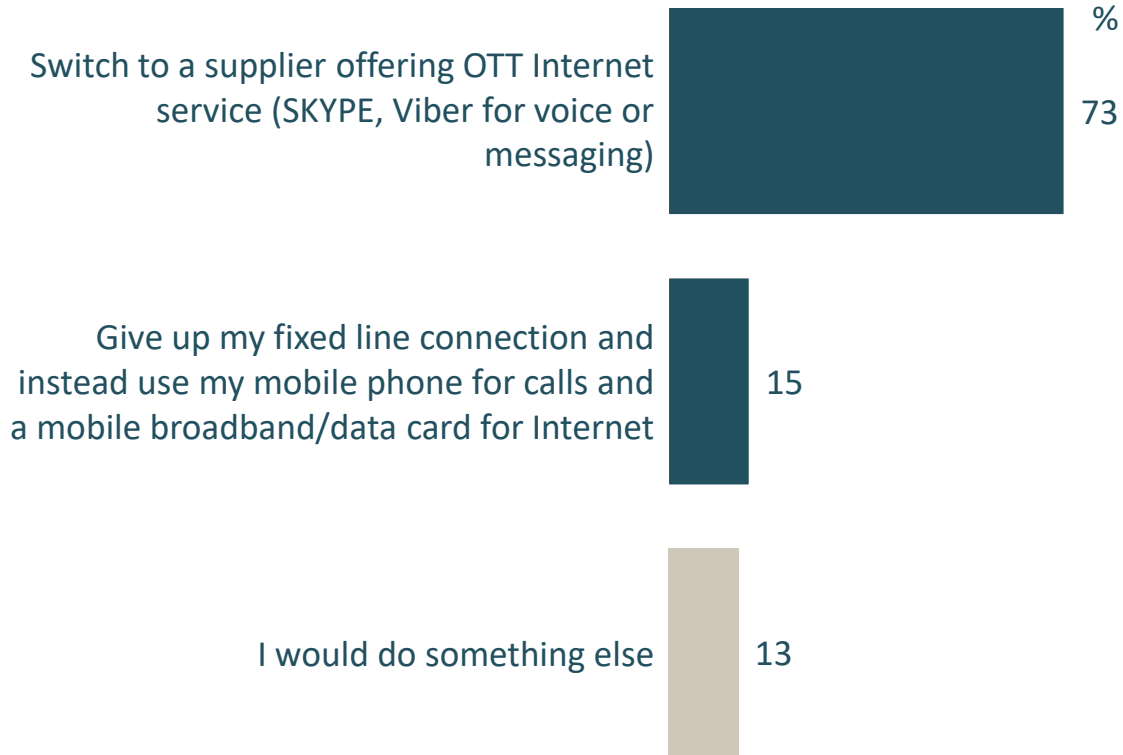
The most likely action to take is to research other offers in the market (34%) given a 1 cent increase in price of call from fixed to mobile.



Method Of Communicating If Fixed Line Is Cancelled

(Base: All SME's Likely To Cancel Fixed Line Services Due to SSNIP, n=6*)

Q. You have just said that you would **cancel the fixed subscription**. What would your business be most likely to do instead?



*Small Base Size

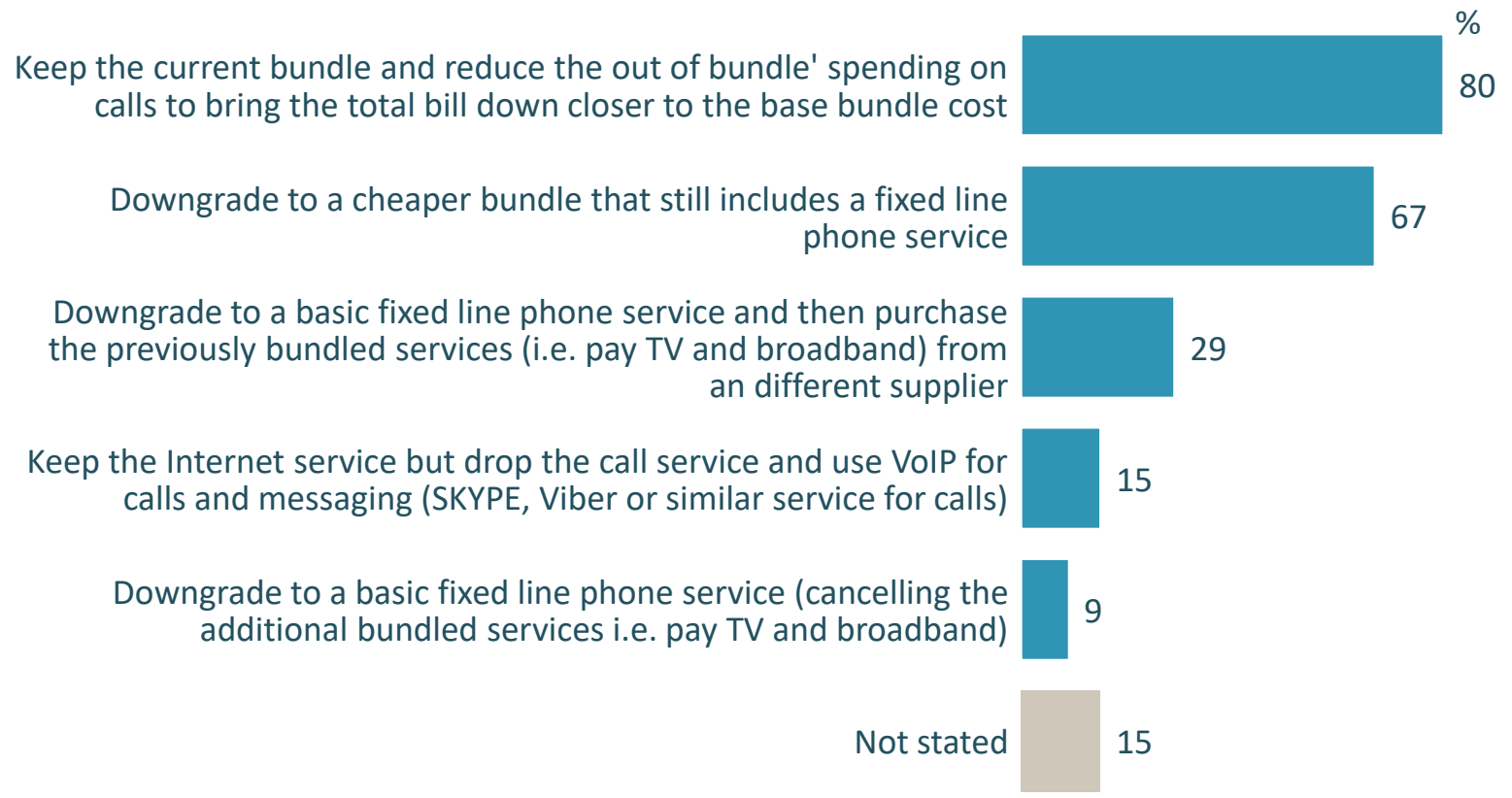
Sample size too small to warrant any meaningful commentary.



Action Business Likely to Take If Cancel/Switch Fixed Line

(Base: All SME's likely to cancel/keep bundle given 1 c increase in price of calls fixed to mobile – 18*).

Q. Which of the following would your business do instead? You can select all that apply.



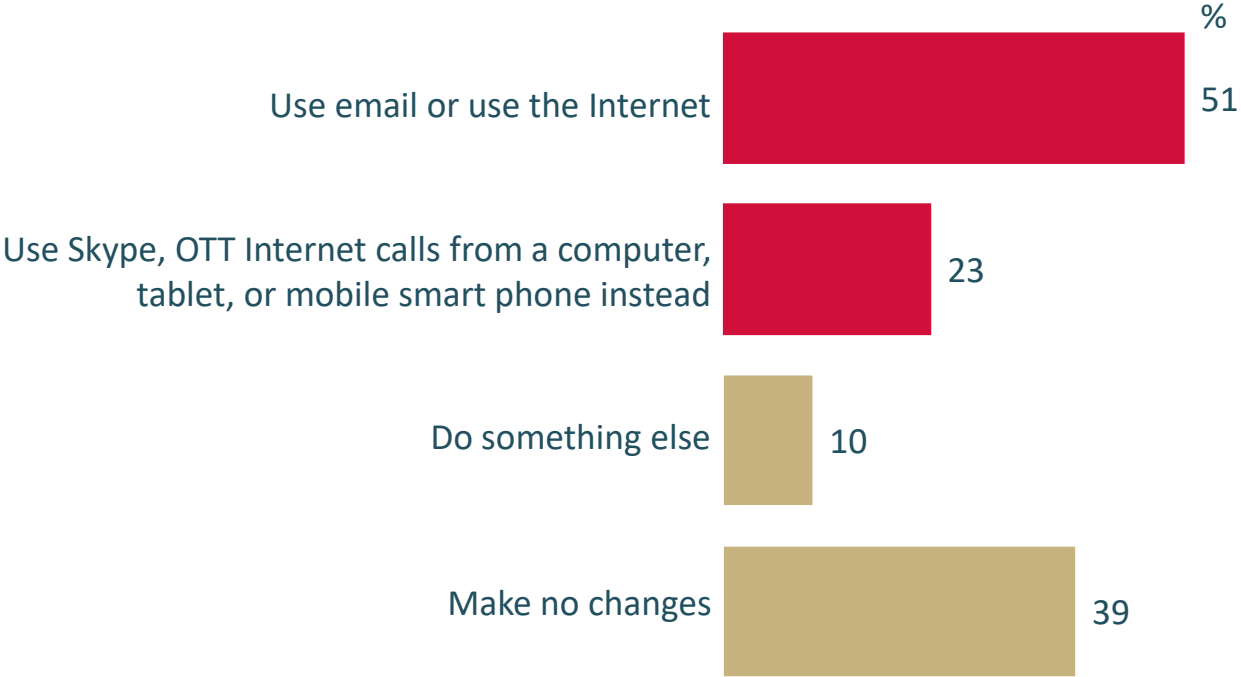
*Small Base Size

Business most likely to keep current bundle but reduce call spend to offset the increase in price of call from fixed to mobile (80%). However sample size is too small to warrant any meaningful commentary.



Alternative Approaches If The Cost Of Mobile To Mobile Calls Increased By 1cent

(Base: All SME's Likely To Cancel Fixed Line As Result Of 1 Cent Increase In Price Of Fixed To Mobile Calls -13*)



* Small base size

If mobile to mobile cost in bundle increased by 1 cent majority would use email or internet instead (51%). However, sample size is too small to warrant any meaningful commentary.





Questionnaire

Questionnaire



165716 BUSINESS FVCT SURVEY 2016 QUESTIONNAIRE

Good morning/afternoon/evening. I am _____ from RED C Research & Marketing, an independent Irish market research agency. We are carrying out a survey today about access to and usage of telecommunications. Would you mind answering a few questions?

CLASSIFICATION SECTION

INTERVIEWER: WE NEED TO SPEAK TO THE PERSON RESPONSIBLE FOR TELECOMMUNICATIONS SELECTION WITHIN THE BUSINESS. SINGLECODE

SCRIPTER: ASK ALL.

BASE: ALL SME'S

1. Are you the person in your organisation who is the **decision maker** or jointly responsible for the selection and/or purchase of telecommunications services for your business, including VOIP services?

1 Yes – continue

2 No – close

INTERVIEWER: READ OUT EACH OPTION. MULTICODE

SCRIPTER: ALL CODE 1 Q1. RECORD YES/NO FOR EACH, RANDOMISE ORDER

BASE: ALL TELECOMMUNICATION DECISION MAKERS

2. Thinking about the role you play **when choosing a telecoms provider** or telecoms services which one of the following, if any, do you usually conduct on behalf of the business?

1. Choose suppliers
2. Contract negotiations
3. Financials
4. Technical /specialist advice
5. Final approval
6. Shortlisting / Initial contact
7. Other (_____Specify)

INTERVIEWER: INSERT NUMBER AS APPROPRIATE IN THE BOX BELOW, DON'T READ OUT DON'T KNOW

SCRIPTER: ALL CODE 1 Q1.

BASE: ALL TELECOMMUNICATION DECISION MAKERS

3. How many business premises does your company have in the Republic of Ireland?

___ [Record Exact Number]

Don't know

INTERVIEWER: INSERT NUMBER AS APPROPRIATE IN THE BOX BELOW, DON'T READ OUT DON'T KNOW

SCRIPTER: IF MORE THAN ONE MENTIONED Q3, NUMBER SHOULD NOT EXCEED THAT GIVEN IN Q3

BASE: ALL TELECOMMUNICATION DECISION MAKERS WITH MULTI SITES IN ROI.

4. For how many of these business premises in Ireland do you **personally have decision making responsibility** for the selection and/or purchasing of telecommunications services, including data connectivity services?

___ [Record Exact Number]

BASE: ALL MULTI SITE ORGANISATIONS

5. Does your decision making responsibility include your organisations main/head office?

Yes

No

INTERVIEWER: READ OUT. MULTICODE

SCRIPTER: ASK ALL TELECOMMUNICATIONS DECISION MAKERS

BASE: ALL TELECOMMUNICATIONS DECISION MAKERS

6. Which best describes the type of business premises for which you are responsible for selecting telecommunication services?

Home office

Office in building (Non-business Park)

Office in Business Park

Data Centre

Other___ (please specify)

INTERVIEWER: SINGLE CODE. PROBE TO PRECODES

SCRIPTER: ASK ALL TELECOMMUNICATION DECISION MAKERS

BASE: ALL TELECOMMUNICATIONS DECISION MAKERS

7. In which county is your main or head office located?

Carlow

Cavan

Clare

Cork

Donegal

Dublin

Galway

Kerry

Kildare

Kilkenny

Laois

Leitrim

Limerick

Longford

Louth

Mayo

Meath

Monaghan

Offaly

Roscommon

Sligo

Tipperary

Waterford

Westmeath

Wexford

Wicklow

Not located in the Republic of Ireland

INTERVIEWER: FIXED LINE IS ANY PHONE NUMBER WITH AN AREA CODE/ANY LOCAL CALL NUMBER OR 076 NUMBER. LINE CAN BE USED FOR CALLS OR FOR DATA, SINGLECODE

SCRIPTER: ASK ALL TELECOMMUNICATION DECISION MAKERS

BASE: ALL TELECOMMUNICATIONS DECISION MAKERS

8. Does your business have a **fixed line phone connection** that is actively used for either voice or data traffic?

1. Yes
2. No

INTERVIEWER: EXPLAIN IF REQUIRED. WE MEAN PHYSICAL LINES INTO THE ORGANISATION, NOT NUMBER OF PHONE EXTENSIONS. SINGLECODE

SCRIPTER: ASK ALL CODE 1 Q8.

BASE: ALL TELECOMMUNICATIONS DECISION MAKERS WITH FIXED LINE PHONE CONNECTION

9. In your business, do you have **more than 1 fixed line** phone connection?

1. Yes
2. No

INTERVIEWER: RECORD EXACT RESPONSE, PROBE FULLY

SCRIPTER: ASK ALL CODE 1 Q9.

BASE: ALL TELECOMMUNICATIONS DECISION MAKERS WITH MORE THAN ONE FIXED LINE PHONE CONNECTION

10. Why do you have more than 1 fixed line phone connection?

INTERVIEWER: READ OUT, SINGLE CODE FOR EACH STATEMENT

SCRIPTER: ASK ALL TELECOMMUNICATION DECISION MAKERS. YES/ NO FOR EACH

BASE: ALL TELECOMMUNICATIONS DECISION MAKERS

11. Which of the following communications services are purchased and being used by your business

1. Voice – the traditional spoken phone calls (not in SKYPE or other internet calls)
2. Voice – Voice Over an IP Network (e.g. SIP Trunk)
5. Voice using Internet based Applications (such as Skype etc.)
3. Mobile Phones for business purpose
4. Broadband/Data

INTERVIEWER: PROBE TO PRE CODES

SCRIPTER: RECORD SEPARATELY FOR SERVICE 1, 2, 4 AND 5 USED AT Q11.

BASE: ASK ALL TELECOMMUNICATIONS DECISION MAKERS

12. In your business which **means of accessing (RELEVANT SERVICE TYPE Q11)** are used?

1. Traditional Phone Line
2. Cable (example service provided by Virgin Media/ UPC)
3. Fixed Broadband provided by a Fibre Network (example ejr next generation fibre network)
4. Mobile Phone on a 2G, 3G or 4G network
5. 3G/4G Mobile Broadband (through a dongle attached to computer, Mj-Fi devices, 3G/4G sim card in Tablets) (DON'T SHOW IF CODE 1 AT Q11)
6. Satellite Connection (DON'T SHOW IF CODE 1 AT Q11)
7. Fixed wireless connection, provided via a modem that receives radio signals through the air (example of service providers offering this service – Imagine Broadband, Ripplecom) (DON'T SHOW IF CODE 1 AT Q11)
8. VPN eg Ejr BIP (Business IP service) BT (MPLS, IP Connect, Etherflow service)
9. Leased Lines – private wire connecting your site for private data/voice traffic between sites
98. Other – please specify

INTERVIEWER: LEASED LINE – FIXED CONNECTION WITH SAME CAPACITY BETWEEN TWO POINTS. FIXED WIRELESS ACCESS USES FIXED LINES BUT WIRE CONNECTS TO ANTENNA ATTACHED TO BUILDING.

SINGLECODE, READOUT

SCRIPTER: IF VPN SELECTED Q12 CODE 8

BASE: ASK ALL TELECOMMUNICATIONS DECISION MAKERS USING VPN

13. You mention that your **company is being provided with a VPN**. VPNs can be delivered over a variety of business connectivity services. Do you know what the **underlying access technology** or infrastructure is used to provide your VPN?

1. DSL
2. Cable
3. Fibre to the premises
4. Fixed wireless access (FWA)
5. Leased line or private wire connected to telecoms data service
6. Other (please specify _____)
7. Don't know

INTERVIEWER: SINGLECODE, PROBE TO PRECODES

SCRIPTER: Q11 CODE 4 + EACH CODE USED Q12

BASE: ASK ALL BROADBAND/DATA USERS

14. What is the **download speed** available on your **main/primary connection** for each of the following (INSERT BROADBAND ACCESS CODES USED IN Q12)

- Up to 2Mb/s
- 3-10 Mb/s
- 11 – 34 Mb/s
- 35-45 Mb/s
- 46- 155 Mb/s
- Over 156 Mb/s
- Don't know

SERVICE PROVIDER

INTERVIEWER: PROBE TO PRE CODES. SINGLE CODE.

SCRIPTER: ASK ALL BUSINESSES WHO ANSWERED CODE 1 AT Q.11

BASE: ALL DECISION MAKERS

15. Which company provides the **fixed line phone service** you mainly use for **voice calls**?

1. Clearwire
2. Digiweb
3. Vodafone
4. Gaelic Telecom
5. Imagine
6. Irish Broadband
7. Magnet
8. Pure
9. eir (Formerly eircom)
10. Virgin Media (Formerly UPC)
11. Verizon
98. Other ____ (specify)

INTERVIEWER: PROBE TO PRECODES. SINGLE CODE

SCRIPTER: ASK ALL BUSINESSES WHO ANSWER CODE 4 AT Q.11 + Q12 (1-6, 8-11)

BASE: ALL BUSINESS WHO SAID THEY CONNECT USING BROADBAND

16. Which company provides your **main broadband service** for your business?

1. Eir (formerly Eircom)
2. Virgin Media (formely UPC)
3. Vodafone
4. Imagine or Access Telecom
5. Digiweb
6. Magnet
7. Airspeed
8. Fastcom
9. Pure Telecom
10. Ripplecom (also called Amocom, Last Mile)
11. Casey
12. Crossan
13. Rapid Broadband
14. Permanet
15. Verizone
98. Other ____ (Please specify)

INTERVIEWER: PROBE TO PRECODES. MULTICODE

SCRIPTER: ASK ALL BUSINESSES WHO ANSWER CODE 4 AT Q.11 + CODE 5 AT Q12

BASE: ALL ADULTS WHO SAID THEY CONNECT USING MOBILE BROADBAND

17. Which company(s) provides your **mobile broadband service**, e.g. using a USB or dongle or data card which you plug into your computer?

3. Three (also known as H3GI + O2)
4. EMobile
5. Postfone
98. Other ____ (please specify)
99. Don't Know

INTERVIEWER: PROBE TO PRECODES. SINGLECODE

SCRIPTER: ASK ALL BUSINESSES WHO ANSWER CODE 3 AT Q.11

BASE: ALL ADULTS WHO USE A MOBILE PHONE

18. Which company(s) provides your **main mobile phone service**?

1. Vodafone
2. Meteor
3. Three (also known as H3GI and O2)
4. Tesco Mobile
5. eMobile/eir
6. Lycamobile
7. ID Mobile/Carphone Warehouse
8. Virgin Mobile
9. Postfone
10. 48
98. Other ____ (please specify)
99. Don't Know

INTERVIEWER: PROBE TO PRECODES. MULTICODE

SCRIPTER: ASK ALL BUSINESSES WHO ANSWER CODE 3 AT Q.11, HIDE OPTION SELECTED AT Q18.

BASE: ALL ADULTS WHO USE A MOBILE PHONE

19. Which **other company**, if any, provides your **mobile phone service**?

11. Vodafone
12. Meteor
13. Three (also known as H3GI and O2)
14. Tesco Mobile
15. eMobile/eir
16. Lycamobile
17. ID Mobile/Carphone Warehouse
18. Virgin Mobile
19. Postfone
20. 48
97. No other (Q18 only)
98. Other ____ (please specify)
99. Don't Know

INTERVIEWER: RECORD %. DON'T READ OUT DON'T KNOW

SCRIPTER: ASK ALL RESPONDENTS WHO ANSWER CODE 3 AT Q.11. MUST NOT EXCEED 100%

BASE: ALL BUSINESSES WHO USE A MOBILE PHONE

20. What **proportion of employees** have a **mobile phone number provided by the business** (as distinct from claiming expenses based on the use of their own personal mobile phone for business purposes)

1. Mobile phone ___%

Don't know

INTERVIEWER: RECORD %. DON'T READ OUT DON'T KNOW

SCRIPTER: ASK ALL BUSINESS WHO ANSWER CODE 1 AT Q.11. MUST NOT EXCEED 100%

BASE: ALL BUSINESSES WHO USE A FIXED LINE PHONE

21. What **proportion of employees** have a **fixed line phone primarily for their use in the premises** (as distinct from a phone shared between employees)?

2. Fixed line phone ___%

Don't know

INTERVIEWER: RESPONSES MUST ADD TO 100%

SCRIPTER: Q20 HIGHER THAN ONE %, RESPONSES MUST ADD TO 100%

BASE: ALL BUSINESSES WHO USE A MOBILE PHONE

22. Thinking about the calls made **from your business' mobile phones** in a typical month by all employees, please provide an **approximate breakdown of the amount of time spent** on your business' mobile phones when in the business premises **for each of the following?**

1. To international phone numbers ___%
2. To local/national fixed line numbers ___%
3. To mobile phones ___%
4. To directory enquires and other premium rate numbers ___%
5. I Don't know
6. No mobile phone calls made

INTERVIEWER: RESPONSES MUST ADD TO 100%

SCRIPTER: ASK ALL RESPONDENTS WHO ANSWER CODE 5 AT Q.11, RESPONSES MUST ADD TO 100%

BASE: ALL BUSINESSES WHO USE VOIP

23. Thinking about the **calls made using internet based voice Apps** such as Skype/Viber, etc. in a typical month by all employees; please provide an **approximate breakdown of the amount of time spent** on skype or other internet-based voice applications for each of the following?

1. To international phone numbers ___%
2. To local/national fixed line numbers ___%
3. To mobile phones ___%
4. To other users of such internet-based apps (Skype, Viber, WhatsApp etc.) ___%
5. To directory enquires and other premium rate numbers ___%
6. I Don't know
7. No skype calls made

SCRIPTER: ASK ALL RESPONDENTS WHO ANSWER CODE 1 AT Q.11

BASE: ALL BUSINESSES WHO HAVE A FIXED VOICE LINE

24. Does your business provide any low call numbers such as 1800, 1850, 1870 etc. – for use by customers or employees?

1. Yes
2. No

SCRIPTER: ASK ALL RESPONDENTS WHO ANSWER CODE 1 AT Q.24. ANSWER NOT TO EXCEED 100%

BASE: ALL BUSINESSES WHO HAVE A FIXED VOICE LINE

25. What proportion of the incoming calls to your business are on these low call numbers?

1. ___%
2. Don't know

SCRIPTER: ASK ALL RESPONDENTS WHO ANSWER CODE 1 AT Q.24. RECORD ACTUAL %

BASE: ALL BUSINESSES WHO HAVE A FIXED VOICE LINE

26. What proportion of your **total communications cost** is related to these low call numbers?

1. ___%
2. Don't know

INTERVIEWER: RESPONSES MUST ADD TO 100%

SCRIPTER: ASK ALL RESPONDENTS WHO ANSWER CODE 2 AT Q.11. RESPONSES MUST ADD TO 100%

BASE: ALL BUSINESSES WHO USE VOIP

27a. Thinking about the **calls made using Voice on an IP Network** in a typical month by all employees; please provide an **approximate breakdown of the amount of time spent** for each of the following?

1. To international phone numbers ___%
2. To local/national fixed line numbers ___%
3. To mobile phones ___%
4. To directory enquires and other premium rate numbers ___%
5. I Don't know

INTERVIEWER: RESPONSES MUST ADD TO 100%

SCRIPTER: ASK ALL RESPONDENTS WHO ANSWER CODE 1 AT Q.11, RESPONSES MUST ADD TO 100%

BASE: ALL BUSINESSES WHO HAVE A FIXED VOICE LINE

27. Thinking about the **calls made from your business' fixed line phone** in a typical month by all employees, please provide an **approximate breakdown of the amount of time spent** on your business' fixed line phone for each of the following?

1. To international phone numbers ___%
2. To local/national fixed line numbers ___%
3. To mobile phones ___%
4. To directory enquires and other premium rate numbers ___%
5. I Don't know
6. No fixed line phone calls made

BUNDLES

SCRIPTER: ASK ALL RESPONDENTS WHO ANSWER CODE 1 AT Q.11, SINGLECODE

BASE: ALL BUSINESSES WHO HAVE A FIXED VOICE LINE

28. Does your business **purchase fixed voice telephony (calls and line rental) as part of a bundle** including other telecommunications services (e.g. broadband or mobile telephony) **from the same supplier** (i.e. a single price for several products)?

1. Yes
2. No

INTERVIEWER: MULTICODE, PROBE TO PRECODES

SCRIPTER: ASK ALL RESPONDENTS WHO ANSWER CODE 1 AT Q28

BASE: ALL BUSINESSES WHO HAVE A BUNDLE

29. What **other services are included in this bundle** in addition to your fixed voice telephony service?

Fixed broadband access
Leased lines\Ethernet
Mobile telephony
Mobile broadband (using a USB modem or dongle)
Other please, specify
Don't know

INTERVIEWER: MULTICODE, PROBE TO PRECODES

SCRIPTER: ASK ALL RESPONDENTS WHO ANSWER CODE 1 AT Q28

BASE: ALL BUSINESSES WHO HAVE A BUNDLE

30. What **additional or other communications services**, if any, do you purchase that are **not included in your fixed voice telephony bundle** or package?

1. Fixed voice telephony
2. Fixed broadband access
3. Leased lines\Ethernet
4. Mobile telephony
5. Mobile broadband (using a USB modem or dongle)
6. Other please, specify
7. Don't know
8. None

INTERVIEWER: SINGLECODE

SCRIPTER: ASK ALL RESPONDENTS WHO ANSWER CODE 1-3 AT Q30

BASE: ALL BUSINESSES WHO HAVE A FIXED SERVICE IN ADDITION TO BUNDLE

30b. Do you purchase you **additional** [INSERT OPTION SELECTED AT Q30 – CODE 1-3] from the **same service provider as your bundle** **or a different service provider?**

1. Yes
2. No

Dont Know

INTERVIEWER: PROBE TO PRE CODES, MULTICODE

SCRIPTER: Q28 CODE 1 AND CODE 1 AT Q30b

BASE: ALL BUSINESSES WHO HAVE A FIXED VOICE LINE

31. You said you **used only one supplier** for your business fixed telecommunication service. **Why does your company use only one supplier** for your fixed telecommunications service?

1. Easier to manage one supplier

2. Negotiate better discounts/ best price
3. They understand our business
4. Provide good/reliable service
5. Offer more advanced/faster line speeds
6. Good relationships with them
7. Historic (Company always dealt with them)
8. Provide other telecoms services to us
9. Get a better service as a bundle

INTERVIEWER: PROBE TO PRE CODES, MULTICODE

SCRIPTER: CODE 2 AT Q30b

BASE: ALL BUSINESSES WHO HAVE A FIXED VOICE LINE

32. **Why does your company use more than one supplier** for your fixed telecommunications services?

1. Tend to go with best price available at time
2. Tend to go with the best/most advanced service available at time
3. Use two suppliers for same requirement - prefer to use a mix in case one lets us down
4. Use different suppliers for different services
5. Different areas/ regions have different telecoms providers
6. Not one single provider is capable of meeting all our service requirements
7. Makes negotiations more competitive
8. No reason – just happened over the years
9. Other (specify)
10. Don't know

INTERVIEWER: SINGLE CODE, READOUT

SCRIPTER: IF MORE THAN ONE OPTION SELECTED Q32. SHOW OPTIONS SELECTED AT Q32.

BASE: ALL BUSINESSES WHO HAVE A FIXED VOICE LINE

33. And what is the **single most important reason** for choosing more than one main supplier for fixed business line/ connection services?

COST AWARENESS

INTERVIEWER: PROBE TO PRECODE, SINGLECODE

SCRIPTER: ASK ALL BUSINESSES CODE 1 AT Q.11.

BASE: ALL BUSINESSES USING FIXED LINE FOR VOICE

34. How **often do you receive a bill** from the main supplier of **your fixed line phone service** (this can be a printed bill or an online or email bill)?

1. Monthly
2. Every two months
3. Every three months
4. Less frequently

INTERVIEWER: RECORD AMOUNT TO NEAREST EURO

SCRIPTER: ASK ALL RESPONDENTS CODE 1 AT Q.11

BASE: ALL BUSINESSES USING FIXED LINE FOR VOICE

35. On average **how much do you pay per month** in total for your **fixed telephone service?** Please **include both the call costs and line rental** in the total monthly cost of your fixed telephone service.

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

SCRIPTER: SUPPLIER SELECTED Q15, SINGLECODE

BASE: ALL BUSINESSES USING FIXED LINE FOR VOICE

37. Which best describes the service agreement between the supplier of your **fixed line telephone service** (Insert Provider Q15) and your business.
- A business contract /package with standard tariffs, terms and conditions
 - A business contract/package designed to suit the specific needs of my business with customised/bespoke tariffs, terms and conditions
 - A residential contract/package

SCRIPTER: ASK ALL RESPONDENTS CODE 1 OR 2 AT Q37.

BASE: ALL BUSINESSES USING FIXED LINE FOR VOICE

38. As part of your business' main package for fixed line calls, are there **discounts related to a commitment for a minimum monthly spend?**
- Yes
 - No
 - Don't know

INTERVIEWER: RECORD AMOUNT TO NEAREST EURO, DON'T READ OUT DON'T KNOW

SCRIPTER: CODE 1 AT Q38

BASE: ALL BUSINESSES USING FIXED LINE FOR VOICE WITH AGREED MINIMUM SPEND

39. What is the **minimum monthly spend that your business has committed to** in order to avail of the discounts offered?
- ___euro
- Don't know

INTERVIEWER: MULTICODE, PROBE TO PRECPDES

SCRIPTER: CODE 1 AT Q38, MULTICODE

BASE: ALL BUSINESSES USING FIXED LINE FOR VOICE WITH AGREED MINIMUM SPEND

40. Please select which of the following call types are **available at a discounted rate if the minimum monthly spend is achieved:**
- Calls to local fixed line phone numbers
 - Calls to national fixed line phone numbers
 - Calls to mobile phone numbers
 - International calls
 - Calls to your low call numbers such as 1800, 1850 and 1870
 - Other please specify

SCRIPTER: ASK ALL CODE 1 AT Q11, SINGLECODE

BASE: ALL BUSINESSES USING FIXED LINE FOR VOICE

41. Thinking about your supplier of fixed line calls (INSERT PROVIDER Q15), does your package include **free calls or discounted call costs from your business' fixed line phones to local fixed line phones?**
- Yes, unlimited
 - Yes, limited number of minutes
 - No free or discounted local calls are included
 - Don't know

INTERVIEWER: PROBE TO PRECPDES, SINGLECODE

SCRIPTER: ASK ALL RESPONDENTS CODE 2 AT Q41. SINGLECODE

BASE: ALL BUSINESSES USING FIXED LINE AND GETTING LIMITED NUMBER OF DISCOUNTED MINUTES

42. How many **minutes per billing period** can be used within your package to make calls from **your business' fixed line phone to other local fixed phone numbers** at no extra cost?

- Up to 30 minutes
- Between 31 and 60 minutes
- Between 61 and 100 minutes
- Between 101 and 200 minutes
- Between 201 and 300 minutes
- More than 300 minutes
- Unlimited
- Don't know

SCRIPTER: Q11 CODE 1, SINGLECODE

BASE: ALL BUSINESSES USING FIXED LINE FOR VOICE

43. Could you state whether you know the cost of **making calls from your business' fixed line phone to other local fixed line phones** in instances where you need to pay for the call?
- Know the exact cost of calls to fixed line phones
 - Know the approximate cost of calls to fixed line phones
 - Don't know or not sure of the cost of calls to fixed line phones
 - Other (Specify)

SCRIPTER: ASK ALL RESPONDENTS CODE 1 AT Q11. SINGLECODE

BASE: ALL BUSINESSES USING FIXED LINE FOR VOICE

- 44a. Does your package include **free calls or discounted call costs from your business' fixed line phones to national fixed line phones?**
- Yes, unlimited
 - Yes, limited number of minutes
 - No free or discounted national calls are included
 - Don't know

SCRIPTER: ASK ALL RESPONDENTS CODE 2 AT Q44a. SINGLECODE

BASE: ALL BUSINESSES USING FIXED LINE AND GETTING LIMITED NUMBER OF DISCOUNTED MINUTES

44. How many **minutes per billing period** can be used within your package to **make calls from your business' fixed line phones to other national fixed phone numbers** at no extra cost?
- Up to 30 minutes
Between 31 and 60 minutes
Between 61 and 100 minutes
Between 101 and 200 minutes
Between 201 and 300 minutes
More than 300 minutes
Unlimited
Don't know

SCRIPTER: Q11 CODE 1, SINGLECODE

BASE: ALL BUSINESSES USING FIXED LINE FOR VOICE

45. Could you state whether you know the cost of **making calls from your business' fixed line phones to national fixed line phones** in instances where you need to pay for the call?
- Know the exact cost of calls to fixed line phones
 - Know the approximate cost of calls to fixed line phones
 - Don't know or not sure of the cost of calls to fixed line phones
 - Other (Specify)

INTERVIEWER: SINGLECODE

SCRIPTER: ASK ALL RESPONDENTS CODE 1 AT Q11.

BASE: ALL BUSINESSES USING FIXED LINE FOR VOICE

46. Does your package include **free call minutes** or **discounted call costs** to **mobile phone numbers**?

1. Yes, to any mobile network
2. Yes, to only some mobile networks
3. No free or discounted call minutes are included
4. Don't know

SCRIPTER: ASK ALL RESPONDENTS CODE 1 OR 2 AT Q46. SINGLECODE

BASE: ALL BUSINESSES USING FIXED LINE AND GETTING LIMITED NUMBER OF DISCOUNTED MINUTES

47. How many **minutes per billing period** can be used within your package to **make calls to mobiles** at no extra cost?

1. Up to 30 minutes
2. Between 31 and 60 minutes
3. Between 61 and 100 minutes
4. Between 101 and 200 minutes
5. Between 201 and 300 minutes
6. More than 300 minutes
7. Unlimited
8. Don't know

SCRIPTER: Q11 CODE 1

BASE: ALL BUSINESSES USING FIXED LINE FOR VOICE

48. Could you state whether you know the **cost of making calls from your business' fixed line phone to mobile phones** (outside of any free minutes included in the package)?

1. Know the exact cost of calls to all mobile phone networks
2. Know the approximate cost of calls to all mobile phone networks
3. Know the exact cost of calls to some mobile networks only
4. Know the approximate cost of calls to some mobile networks only
5. Don't know or not sure of the cost of calls to mobile phone numbers
6. Don't make this type of calls

INTERVIEWER: READ OUT EACH OPTION – SINGLE CODE

SCRIPTER: Q11 CODE 1

BASE: ALL TELECOMMUNICATIONS DECISION MAKERS USING FIXED LINE FOR VOICE

49. When you are thinking about (and reviewing) the cost of the fixed business telecommunications services, **do you think about the cost of calls and line rental/access separately**?

1. No – we are more concerned with the overall cost of the fixed voice package
2. Yes – we think about the cost of calls and line rental/access separately
3. We don't think about costs at all

INTERVIEWER: SINGLE CODE

SCRIPTER: Q11 CODE 1

BASE: ALL TELECOMMUNICATIONS DECISION MAKERS USING FIXED LINE

50. Do you or does somebody else in your organisation **check in detail the fixed phone bills** that your business receives (either electronically or in the post)?

1. Yes - myself or another person
2. No

INTERVIEWER: READ OUT EACH OPTION – MULTICODE

SCRIPTER: Q50 CODE 1

BASE: ALL BUSINESSES USING FIXED LINE WHO CHECK DETAILS OF THEIR BILL

51. Which of the following are **checked on each bill**?

1. The total amount
2. If the amount is greater than the bundle price
3. The cost of calls to local or national phone numbers
4. The cost of calls to mobile phone numbers
5. The cost of premium rate numbers and calls to directory enquiries
6. The cost of international phone calls
7. The cost of the line/connection
8. None of these

SWITCHING

INTERVIEWER: READ OUT EACH OPTION – SINGLE CODE

SCRIPTER: Q11 CODE 1

BASE: ALL TELECOMMUNICATIONS DECISION MAKERS USING FIXED LINE FOR VOICE

52. Thinking about **your business' approach to selecting a fixed line phone supplier**, which of the following statements best captures its approach?

1. As part of a formal procurement process where potential suppliers are asked to submit written proposals in response to a request for tender or similar document and evaluated against set-out criteria
2. As part of semi-formal procurement process with potential suppliers asked to submit written proposals in response to a briefing
3. Informally – in response to an approach from a new supplier with an attractive offer or following research of available offers

INTERVIEWER: PROBE TO PRE CODES. SINGLE CODE, THIS QUESTION REFERS TO LENGTH OF CURRENT CONTRACT AND NOT HOW LONG THEY HAVE BEEN WITH THE PARTICULAR PROVIDER

SCRIPTER: Q11 CODE 1

BASE: ALL BUSINESSES USING FIXED LINE

54. What is the **length of your current contract** for the provision of your **fixed line phone service**?

1. Within the past month
2. 2-3 months
3. 4-6 months
4. Between 6 months and 12 months
5. Between 1 and 2 years
6. Between 2 and 3 years
7. Between 3 and 5 years
8. Longer than 5 years
99. Don't Know

INTERVIEWER: SINGLE CODE

SCRIPTER: Q11 CODE 1

BASE: ALL BUSINESSES USING FIXED LINE

55. Has your business **reviewed its telecommunications services provider arrangements** within the last 3 years?

1. Yes
2. No
3. Don't know

SCRIPTER: Q11 CODE 1

BASE: ALL BUSINESSES USING FIXED LINE

56. Have you **switched fixed line phone service supplier**? (if you have more than one fixed line phone supplier, please consider if you have **switched any supplier**)

1. Yes – within the last twelve months
2. Yes – between one and three years ago
3. Yes – more than three years ago
4. Never switched

INTERVIEWER: PROBE TO PRE CODES, SINGLECODE

SCRIPTER: Q56 CODE 1, 2 OR 3

BASE: ALL BUSINESSES USING FIXED LINE WHO HAVE SWITCHED

57. Which **fixed line phone service supplier** were you **previously with**?

1. Eir (Eircom)
2. Virgin Media (formerly UPC)
3. Vodafone
4. Imagine or Access Telecom
5. Digiweb
6. Magnet
7. IFA Telecom
8. Airspeed
9. Blueface
10. Fastcom
11. Greencom
12. Hive Telecom
13. Pure Telecom
14. Ripplecom (also called Amocom, Last Mile)
15. Satellite Broadband
16. Talk Talk
98. Other _____ (please specify)

INTERVIEWER: MULTICODE

SCRIPTER: Q56 CODE 1, 2 OR 3

BASE: ALL BUSINESSES USING FIXED LINE WHO HAVE SWITCHED

58. Did you purchase **any other telecommunications services from this supplier**?

- Fixed Broadband/Data Service
- Mobile Phone service
- Mobile Broadband
- Leased Line/Ethernet
- Other – please specify
- None of these

INTERVIEWER: MULTICODE, RANK RESPONSES WITH 1 BEING MOST IMPORTANT AND 3 BEING LESS IMPORTANT

SCRIPTER: Q11 CODE 1 + Q54 CODE 1 – 6, RANDOMISE ORDER, RANK RESPONSES WITH 1 BEING MOST IMPORTANT AND 3 BEING LESS IMPORTANT

BASE: ALL BUSINESSES USING FIXED LINE AND WITH CURRENT SUPPLIER PAST 3 YEARS

59. Thinking about **when you chose your current fixed line phone service supplier**, please select the **top three reasons** out of the following set of possible reasons which were most **important** to your decision to choose your business' fixed line phone service supplier, with 1 being the most important reason and 3 being less important. Note that all of the reasons may be relevant to your particular service supplier

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2. Cost of line rental
3. Cost faced by others such as customers when calling our business
4. Offered a better value bundle or package compared with alternative suppliers (ONLY SHOW IF Q28 CODE 1)
5. Better customer service
6. Offered a better broadband product as part of a bundle with the fixed line phone (ONLY SHOW IF Q28 CODE 1)
7. Trust in the brand/supplier
8. Other _____ [CAPTURE]

INTERVIEWER: READ OUT ALL OPTIONS. MULTICODE

SCRIPTER: Q59 CODE 1, RANDOMISE ORDER

BASE: ALL BUSINESSES STATING COST OF CALLS AS A REASON TO JOIN CURRENT PROVIDER

60. You mentioned that the **cost of making calls was an important reason** for choosing your current fixed line supplier. Please select the **type of call which was of particular importance** from the following list.

1. Cost of calls to fixed line phone numbers
2. Cost of calls to mobile phone numbers
3. Cost of calls to premium numbers (typically beginning with 15xx)
4. Cost of calls to **callsave** (1850) or lo-call (1890) numbers
5. Cost of international calls
6. Cost of calls to directory enquiry services
7. No particular type of call

INTERVIEWER: READ OUT ALL OPTIONS. MULTICODE

SCRIPTER: Q59 CODE 3

BASE: ALL BUSINESSES STATING COST OF CALLS AS A REASON TO JOIN CURRENT PROVIDER

61. You mentioned that the **cost of calls faced by others when calling your business was an important reason** when choosing your supplier. Please select the **type of call which was of particular importance** from the following list.

1. Cost of calls incoming to fixed line phone numbers
2. Cost of calls incoming to mobile phone numbers
3. Cost of calls incoming to premium numbers (typically beginning with 15xx)
4. Cost of calls to incoming to **callsave** (1850) or lo-call (1890) numbers
5. No particular type of call

INTERVIEWER: READ OUT ALL OPTIONS. MULTICODE

SCRIPTER: Q59 CODE 3

BASE: ALL BUSINESSES STATING COST OF CALLS AS A REASON TO JOIN CURRENT PROVIDER

62. In respect of **calls incoming to your business' fixed-line phones**, has your business ever taken any of the following actions to **reduce the costs that people face when calling the business**?

- Encouraged customers to phone a low call or cost save number in order to reduce the cost to them
- Encouraged customers to send an email or text message instead of making a call to your **business' fixed line phones**
- Switched to another fixed operator to reduce the cost of incoming calls to your business' fixed line phones
- Provided some employees with mobile phones so that customers could have the option to use those mobile numbers instead and potentially reduce the cost of the call
- Other _____ [CAPTURE]

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INTERVIEWER: READ OUT EACH STATEMENT. CODE PER STATEMENT REQUIRED.

SCRIPTER: Q11 CODE 1. ALLOW DON'T KNOW

BASE: ALL BUSINESSES WHO HAVE A FIXED LINE

63. Thinking of the following reasons why you may still have a fixed line phone in your business, please rate the following potential reasons on a scale of 1 to 5 where 5 is most like your reason for keeping a fixed line phone in your business and 1 is least like the reason for keeping a fixed line phone in your business.
1. A fixed line phone is cheaper than using mobile phone for some types of calls
 2. Fixed line phone is/are important in terms of the day-to-day functioning of our business
 3. Because we need a fixed line connection for internet anyway, and a fixed line phone connection is offered as part of a service bundle
 4. There is poor mobile phone coverage in our business premises, so we need to use fixed line phones for business calls
 5. Because it means we can have a single contact phone number for the business [i.e. managed on an internal switch/PABX]

CALLING PATTERNS

INTERVIEWER: READ OUT ALL OPTIONS. MULTICODE, ENTER TYPE OF PHONE PREFERRED FOR EACH CATEGORY OF CALL – ENTER ACROSS MULTIPLE IF MULTIPLE PREFERRED/NO PREFERENCE

SCRIPTER: IF MORE THAN ONE CODE (1-3) IS SELECTED AT Q11.

BASE: ALL BUSINESSES WHO HAVE A FIXED LINE

64. Thinking about the categories of calls employees make from your business premises, please select what your employees would primarily use for each of the following types of calls. If there are several options which your employees would primarily use, please select multiple options

| Type of call | Fixed line phone in your business (IF Q11 CODE 1) | VOIP or VOB (Voice over Broadband) (IF Q11 CODE 2) | Internet based apps (Skype, Viber) (IF Q11 CODE 5) | Mobile Phone (IF Q11 CODE 3) | No Preference |
|--|---|--|--|------------------------------|---------------|
| Calls to local fixed line phones | | | | | |
| Calls to national fixed line phones | | | | | |
| Calls to mobile phones on the same network as your mobile phone (such as other employees on the same mobile network) | | | | | |
| Calls to mobile phones on a different network to your mobile phone | | | | | |
| Calls to international numbers | | | | | |

NON FIXED LINE

INTERVIEWER: SINGLECODE

SCRIPTER: ALL WHO DO NOT HAVE VOICE (CODE 1) AT Q11

BASE: ALL BUSINESSES NOT CURRENTLY USING FIXED LINE PHONE

65. Did you previously have a fixed line phone in your business premises?
1. Yes
 2. No (GO TO Q69)

INTERVIEWER: SINGLECODE

SCRIPTER: Q65 CODE 1, IF CODE 2 AT Q65 GO TO Q69

BASE: ALL BUSINESSES NOT CURRENTLY USING FIXED LINE PHONE

66. How long ago did you stop having a fixed line phone in your business premises?
1. Within the last twelve months
 2. Between one and three years ago
 3. More than three years ago

INTERVIEWER: RECORD VERBATIM

SCRIPTER: ALL WHO DO NOT HAVE VOICE (CODE 1) AT Q11

BASE: ALL BUSINESSES NOT CURRENTLY USING FIXED LINE PHONE

67. Why don't you have a fixed line phone in your business premises? Any other reason?

INTERVIEWER: READ OUT STATEMENTS

SCRIPTER: Q11 NOT CODE 1, RANDOMISE STATEMENTS, INSERT SCALE 1-5 + NA

BASE: ALL BUSINESSES NOT CURRENTLY USING FIXED LINE PHONE

68. For each of the following possible reasons for why you decided to no longer have a fixed line phone in your business premises, please state of on a scale of 1 to 5 where 1 is least like your reason and 5 is most like your reason (or 6 is not applicable)
1. Mobile phones are used instead and the business doesn't need a fixed line phone
 2. Employees can make calls using Skype or other internet calling services (VoIP) instead from a computer, laptop, tablet, or mobile smart phone
 3. The cost of line rental is too high
 4. The cost of calls from a fixed line phone are too high
 5. The cost of installation or connection is too high

SSNIP

I now want to ask you some questions about possible changes in the costs of your business phone service and how you might react to these price changes. These are not necessarily changes that are planned by you, or any other, fixed line phone supplier - however we are interested in your reactions to them if they were to be hypothetically implemented.

INTERVIEWER: SINGLECODE, PROBE TO PRECODES

SCRIPTER: Q11 CODE 1 + Q28 CODE 2

BASE: ALL BUSINESSES USING FIXED LINE VOICE + NON BUNDLE

69. Imagine if the cost of a phone call from your fixed line to other fixed lines on a different network/different landline provider to you increased by 1 cent per minute.

As a consequence of this 1 cent per minute increase in the cost of calls from your landline to

concerning your bill or potentially switching to an alternative supplier):

1. Yes – definitely would change behaviour
2. Maybe change behaviour
3. NO

INTERVIEWER: SINGLE CODE, READ OUT

SCRIPTER: Q69 CODE 1 OR 2

BASE: ALL TELECOMMUNICATION DECISION MAKERS LIKELY TO CHANGE BEHAVIOUR

70. Which of the following would describe what your business would be **most likely to do**?

1. Do nothing
2. Cancel the subscription with the fixed supplier
3. Keep the subscription but make fewer calls on the fixed line
4. Do something else _____[PLEASE SPECIFY]

INTERVIEWER: SINGLE CODE, PROBE TO PRECODES

SCRIPTER: Q70 CODE 2

BASE: ALL TELECOMMUNICATION DECISION MAKERS LIKELY TO CHANGE BEHAVIOUR

71. You have just said that you would **cancel the fixed subscription**. What would your business be most likely to do instead?

1. Cancel the fixed line connection and use mobile phone instead
2. Cancel and switch to a supplier offering VoIP service (SKYPE, Viber for voice or messaging)
3. Give up the fixed line connection and instead use mobile phone for calls and a mobile broadband/data card for internet
4. Do something else _____[PLEASE SPECIFY]

INTERVIEWER: MULTICODE, READ OUT

SCRIPTER: Q70 CODE 2 OR 3, RANDOMISE STATEMENTS, ASK YES/NO AT EACH STATEMENT

BASE: ALL TELECOMMUNICATION DECISION MAKERS LIKELY TO CHANGE BEHAVIOUR

72. Which of the following would your business do instead? You can select all that apply.

Would you...

1. make more calls on mobile
2. send more texts on mobile
3. use mobile phone more for both calls and texts
4. send more emails or use the internet more often
5. make voice or video calls more often using Apps such as Skype, Viber, Facetime and WhatsApp.
6. make less calls on my landline and not replace them with other forms of communication
7. do something else _____[PLEASE SPECIFY]

INTERVIEWER: RECORD FOR EACH OPTION YES AT Q69, PROBE TO PRECODE

SCRIPTER: ANY YES CODE Q72 1-8

BASE: ALL TELECOMMUNICATION DECISION MAKERS CHANGING COMMUNICATION METHOD

73. Should the **cost of a phone call from your fixed line to another fixed line** on a different network/different landline provider increase by **1 cent per minute**, how often would your business [INSERT EACH STATEMENT SELECTED IN ABOVE Q72, CODE 1-8].

1. Never
2. Occasionally - less than a quarter of the time
3. Approximately a quarter of the time
4. Approximately half the time
5. Often - Around three quarters of the time

INTERVIEWER: SINGLECODE, PROBE TO PRECODE

SCRIPTER: Q11 CODE 1 + Q28 CODE 2

BASE: ALL BUSINESSES USING FIXED LINE VOICE + NON BUNDLE

74. Imagine if the **cost of a phone call from your fixed line to mobile phones** increased by **1 cent per minute**.

As a consequence of this **1 cent per minute** increase in the cost of calls to mobiles, do you believe that you would change your behaviour (including cancelling your bill or potentially switching to an alternative supplier)?

1. Yes – definitely would change behaviour
2. Maybe change behaviour
3. NO

INTERVIEWER: SINGLE CODE, READ OUT

SCRIPTER: Q74 CODE 1 OR 2

BASE: ALL TELECOMMUNICATION DECISION MAKERS LIKELY TO CHANGE BEHAVIOUR

75. Which of the following would describe what your business would be **most likely to do**?

1. do nothing
2. cancel the subscription with the fixed supplier
3. keep the subscription but make fewer calls on fixed line
4. do something else _____[PLEASE SPECIFY]

INTERVIEWER: SINGLE CODE, PROBE TO PRECODES

SCRIPTER: Q75 CODE 2

BASE: ALL TELECOMMUNICATION DECISION MAKERS LIKELY TO CANCEL SERVICE BASED ON INCREASE IN COST

76. You have just said that you would **cancel your subscription**, what would your business do instead?

1. cancel the fixed line connection and use the mobile phone instead
2. Cancel and switch to a supplier offering VoIP service (SKYPE, Viber for voice or messaging)
3. Give up the fixed line connection and instead use mobile phone for calls and a mobile broadband/data card for internet
4. do something else _____[PLEASE SPECIFY]

INTERVIEWER: MULTICODE, READ OUT

SCRIPTER: Q75 CODE 2-3, ASK YES/NO AT EACH STATEMENT

BASE: ALL BUSINESSES LIKELY TO CANCEL OR REDUCE CALLS

77. Which of the following would your business do instead? You can select all that apply.

Would you...

1. make more calls on mobile
2. send more texts on mobile
3. use mobile phone more for both calls and texts
4. send more emails or use the internet more often
5. make voice or video calls more often using Apps such as Skype, Viber, Facetime and WhatsApp.
6. Make less calls on the landline and not replace them with other forms of communication
7. do something else _____[PLEASE SPECIFY]

INTERVIEWER: MULTICODE, READ OUT

SCRIPTER: Q77 CODE 1 OR 3 OR Q72 CODE 1 OR 3

BASE: ALL BUSINESSES LIKELY TO USE MOBILE AS RESULTS OF INCREASE IN FIXED LINE COST

78. If the **cost of mobile to mobile calls also goes up by 1c per minute** would this encourage you to use any of the following options.
1. use email or use the internet
 2. use Skype, internet calls or VoIP from a computer, tablet, or mobile smart phone instead
 3. make no changes
 4. do something else _____ [PLEASE SPECIFY]

INTERVIEWER: SINGLECODE FOR EACH OPTION YES AT Q77

SCRIPTER: ANY YES CODE Q77 1-8

BASE: ALL BUSINESSES CHANGING COMMUNICATION

79. Should the **cost of a phone call from your fixed line to mobile phones increase by 1 cent per minute**, How often would your business [INSERT EACH STATEMENT SELECTED IN ABOVE Q77, STATEMENTS 1-8]
1. Never
 2. Occasionally - less than a quarter of the time
 3. Approximately a quarter of the time
 4. Approximately half the time
 5. Often - Around three quarters of the time
 6. Almost always or always

INTERVIEWER: SINGLECODE

SCRIPTER: Q11 CODE 1 + Q28 CODE 1

BASE: ALL BUSINESSES USING FIXED LINE VOICE + BUNDLE

80. Imagine if the **cost of calls in your bundle from your landline to other landlines** on a different network/different landline provider to you increased by **1 cent per minute**, do you believe that your business would change its behaviour (including cancelling your bill or potentially switching to an alternative provider).
1. Yes – definitely would change behaviour
 2. Maybe change behaviour
 3. NO

INTERVIEWER: SINGLE CODE, READ OUT

SCRIPTER: Q80 CODE 1 OR 2

BASE: ALL BUSINESSES LIKELY TO CHANGE BEHAVIOUR

81. Which of the following would describe what you would be **most likely to do**?
1. do nothing
 2. cancel the subscription with the fixed supplier
 3. keep the current supplier but downgrade to a cheaper bundle
 4. do something else _____ [PLEASE SPECIFY]

INTERVIEWER: SINGLE CODE, PROBE TO PRECODES

SCRIPTER: Q81 CODE 2

BASE: ALL BUSINESSES LIKELY TO CANCEL SERVICE BASED ON INCREASE IN COST

82. You have just said that you would **cancel your subscription**, what would your business be likely to do instead?
1. Switch to a supplier offering VoIP service (SKYPE, Viber for voice or messaging)
 2. Give up the fixed line connection and use mobile phone instead
 3. Give up the fixed line connection and instead use mobile phone for calls and a mobile broadband/data card for internet
 4. do something else _____ [PLEASE SPECIFY]

□

INTERVIEWER: MULTICODE, READ OUT

SCRIPTER: Q81 CODE 2 OR 3, ASK YES/NO AT EACH STATEMENT

BASE: ALL BUSINESSES LIKELY TO CANCEL OR REDUCE CALLS

83. How would your business change how it purchases the services from your current supplier? You can select all that apply.
- Would you...
1. downgrade to a cheaper bundle that still includes a fixed line phone service
 2. downgrade to a basic fixed line phone service (cancelling the additional bundled services i.e. pay TV and broadband)
 3. downgrade to a basic fixed line phone service and then purchase the previously bundled services (i.e. pay TV and broadband) from a different supplier
 4. keep the internet service but drop the call service and use VoIP for calls and messaging (SKYPE, Viber or similar service for calls)
 5. keep the current bundle and reduce the out of bundle' spending on calls to bring the total bill down closer to the base bundle cost
 6. do something else _____ [PLEASE SPECIFY]

INTERVIEWER: MULTICODE, READ OUT

SCRIPTER: ANY YES TO CODE 2 OR 3 Q81, ASK YES/NO AT EACH STATEMENT

BASE: ALL BUSINESSES CHANGING COMMUNICATION

84. Which of the following would your business do instead? You can select all that apply.
- Would you...
1. make more calls on mobile
 2. send more texts on mobile
 3. use mobile phone more for both calls and texts
 4. send more emails or use the internet more often
 5. make voice or video calls more often using Apps such as Skype, Viber, Facetime and WhatsApp.
 6. make less calls on the landline and not replace them with other forms of communication
 7. do something else _____ [PLEASE SPECIFY]

INTERVIEWER: RECORD FOR EACH OPTION YES AT Q84

SCRIPTER: ANY YES CODE Q84 STATEMENT 1-8

BASE: ALL BUSINESSES CHANGING COMMUNICATION

85. Should the **cost of calls in your bundle from your landline to other landlines** on a different network/different landline provider to you increased by **1 cent per minute** how often would your business [INSERT EACH STATEMENT SELECTED IN Q84, STATEMENTS 1 TO 8]
1. Never
 2. Occasionally - less than a quarter of the time
 3. Approximately a quarter of the time
 4. Approximately half the time
 5. Often - Around three quarters of the time
 6. Almost always or always

INTERVIEWER: SINGLECODE

SCRIPTER: Q11 CODE 1 + Q28 CODE 1

BASE: ALL BUSINESSES USING FIXED LINE VOICE + BUNDLE

86. Imagine if the **cost of calls in your bundle from your landline to mobile phone** increased by **1 cent per minute**, do you believe that your business would change its behaviour (including cancelling your bill or potentially switching to an alternative provider).

1. Yes – definitely would change behaviour
2. Maybe change behaviour
3. No

INTERVIEWER: SINGLE CODE, READ OUT

SCRIPTER: Q86 CODE 1 OR 2

BASE: ALL BUSINESSES LIKELY TO CHANGE BEHAVIOUR

87. Which of the following would describe what your business would be most likely do?

1. do nothing
2. cancel my subscription with my fixed supplier
3. keep my current supplier but downgrade to a cheaper bundle
4. do something else ____ [Please Specify]

INTERVIEWER: SINGLE CODE, PROBE TO PRECODES

SCRIPTER: Q87 CODE 2

BASE: ALL BUSINESSES LIKELY TO CANCEL SERVICE BASED ON INCREASE IN COST

88. You have just said that you would **cancel your subscription**, what would your business be likely to do instead?

1. Switch to a supplier offering VoIP service (SKYPE, Viber for voice or messaging)
2. Give up the fixed line connection and use mobile phone instead
3. Give up the fixed line connection and instead use mobile phone for calls and a mobile broadband/data card for internet
4. do something else ____ [PLEASE SPECIFY]

INTERVIEWER: SELECT ALL THAT APPLY

SCRIPTER: Q87 CODE 2 OR 3, ASK YES/NO AT EACH STATEMENT

BASE: ALL BUSINESSES LIKELY TO CANCEL OR REDUCE CALLS

89. How would your business change how it purchases the services from your current supplier? You can select all that apply.
Would you...

1. downgrade to a cheaper bundle that still includes a fixed line phone service
2. downgrade to a basic fixed line phone service (cancelling the additional bundled services i.e. pay TV and broadband)
3. downgrade to a basic fixed line phone service and then purchase the previously bundled services (i.e. pay TV and broadband) from an different supplier
4. keep the internet service but drop the call service and use VoIP for calls and messaging (SKYPE, Viber or similar service for calls)
5. keep the current bundle and reduce the out of bundle' spending on calls to bring the total bill down closer to the base bundle cost
6. do something else ____ [Please specify]

INTERVIEWER: MULTICODE, READ OUT

SCRIPTER: Q88 CODE 2-3, ASK YES/NO AT EACH STATEMENT

BASE: ALL BUSINESSES LIKELY TO CANCEL OR REDUCE CALLS

90. Which of the following would your business do instead? You can select all that apply.
Would you...

1. make more calls on mobile

2. send more texts on mobile
3. use mobile phone more for both calls and texts
4. send more emails or use the internet more
5. make voice or video calls more often using Apps such as Skype, Viber, Facetime and WhatsApp.
6. make less calls on the landline and not replace them with other forms of communication
7. do something else ____ [Please specify]

INTERVIEWER: READ OUT. SELECT ALL THAT APPLY

SCRIPTER: Q90 CODE 1 OR 3 OR Q84 CODE 1 OR 3

BASE: ALL BUSINESSES LIKELY TO USE MOBILE MORE AS RESULTS OF INCREASE IN FIXED LINE

91. If the **cost of mobile to mobile calls also goes up by 1c per minute** would this encourage your business to use any of the following options.

1. use email or use the internet
2. would use Skype, internet calls or VoIP from a computer, tablet, or mobile smart phone instead
3. would make no changes
4. would do something else ____ [Please Specify]

INTERVIEWER: RECORD FOR EACH OPTION YES AT Q90

SCRIPTER: ANY YES CODE Q90 1-8

BASE: ALL BUSINESSES CHANGING COMMUNICATION

92. Should the **cost of calls in your bundle from your landline to mobile phone** increased by **1 cent per minute**, how often would you [INSERT EACH STATEMENT SELECTED IN Q90, STATEMENTS 1 TO 8]

1. Never
2. Occasionally - less than a quarter of the time
3. Approximately a quarter of the time
4. Approximately half the time
5. Often - Around three quarters of the time
6. Almost always or always

INTERVIEWER: RECORD AMOUNT

SCRIPTER: CODE 1 AT Q11 + CODE 1 AT Q28

BASE: ALL TELECOMMUNICATION DECISION MAKERS

93. And approximately how much would the **total annual business spend on telecommunications services** – such as fixed line and mobile phones, internet access and other related services – for the part of the business/organisation over which you are responsible for selecting suppliers?

€ ____
REFUSED/DON'T KNOW

INTERVIEWER: RECORD AMOUNT

SCRIPTER: ASK ALL

BASE: ALL TELECOMMUNICATION DECISION MAKERS

94. What approximately was the **previous year's annual turnover/or budget** (if non-commercial organisation) for the part of the business/organisation over which you are responsible for selecting telecommunications suppliers? I should also stress that **the information you provide will be treated in confidence** by my research company and won't be provided in any form that will identify your business.

€ ____
REFUSED/DON'T KNOW

**THANK
YOU**

REDC