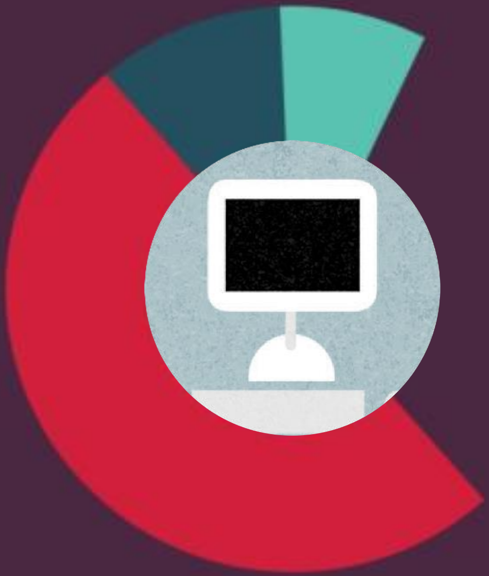
ComReg Document 16/96a



ComReg: Market Analysis Research Consumer Survey

Commission for Communications Regulation

REDC

Background and Objectives

- The Commission for Communications Regulation (ComReg) wish to conduct a Market Analysis survey of the consumer market for broadband in Ireland
- The purpose of the research is to access the following:
  - Access to broadband
  - Understand mode of broadband access
  - Establish consumer incidence of bundling and switching
- Specifically the research examines access to broadband at a total urban, urban less Dublin and rural level to understand the difference in the competitive context in these three geographic areas.

Methodology

- 1,000 interviews were conducted on a nationally representative basis. All interviewers were conducted face to face on CAPI handheld machines.
- 800 boost interviews were conducted in order to allow for more detailed analysis within the three geographic areas highlighted.
- The combined sample of 1,815 was weighted on a nationally representative basis.
- Rural areas are those parts of the country with a population less than 1,500 people

Region	Number of Interviews Conducted	Weighted Representative Sample
Dublin	551	490
Total Urban ex Dublin	640	668
Rural	624	657

- Household decision makers for telecommunications were interviewed in the research and quota controls were imposed to ensure the sample is representative of this population.
- In the switching and bundle section of the questionnaire we excluded households where employers pays for any telecommunication service as occupant doesn’t have same level of control on selection of service provider.
- Fieldwork was conducted between 27th October – 26th November 2014.

Note on Sample Size & Data Cleaning

- ComReg have requested a complete analysis of the data connectivity in the consumer market. This involves analysis by every means of broadband access. Some assess modes are not commonly used and therefore have very small bases sizes. In the interest of completeness these access modes has been shown however the data reported is not significant. The chart will indicate which access modes these are and care should be taken when interrupting this information

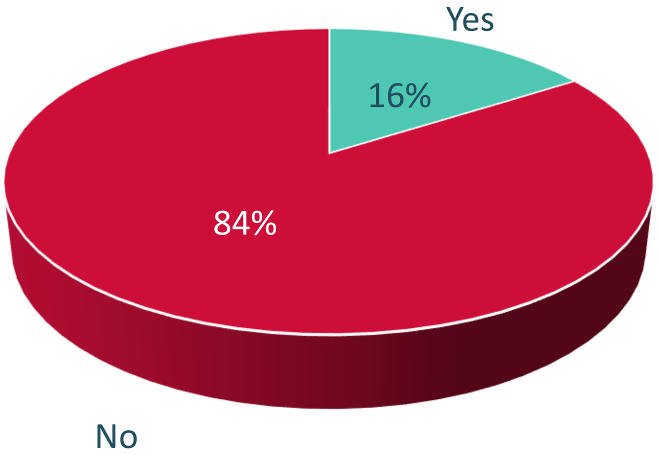
Access Type Primary Broadband Mode	Base Size
Fixed Landline	851
Fibre Network	98
Cable Network	405
3G/4G Mobile Broadband	126
Fixed Wireless	58
3G/4G Mobile Phone	31
Satellite Broadband	6

- On filtered questions the base size described above will fall further and analysis within each access type will not always be possible.
- Aprox 10% of responses to the means of accessing broadband needed to be cleaned as they didn't correlate with the service provider given.

Note: On Household Where Employer Pays Telecommunications Bills

(Base: All Decision Makers, N=1,812)

Q.28 Does the employer of any member of your household pay for any household bills?



16% of households have some form of data connectivity services paid for by an employer of any household member. The bundling and switching section of the report have been reported excluding these households.

Presentation Structure

- Sample Profile
- Broadband Penetration and Those Without Access
- Broadband Access and Usage
- Suppliers Of Communications Service
- Satisfaction with Supply
- Knowledge of Speed of Service
- Bundling
- Contracts & Switching
- SSNIP

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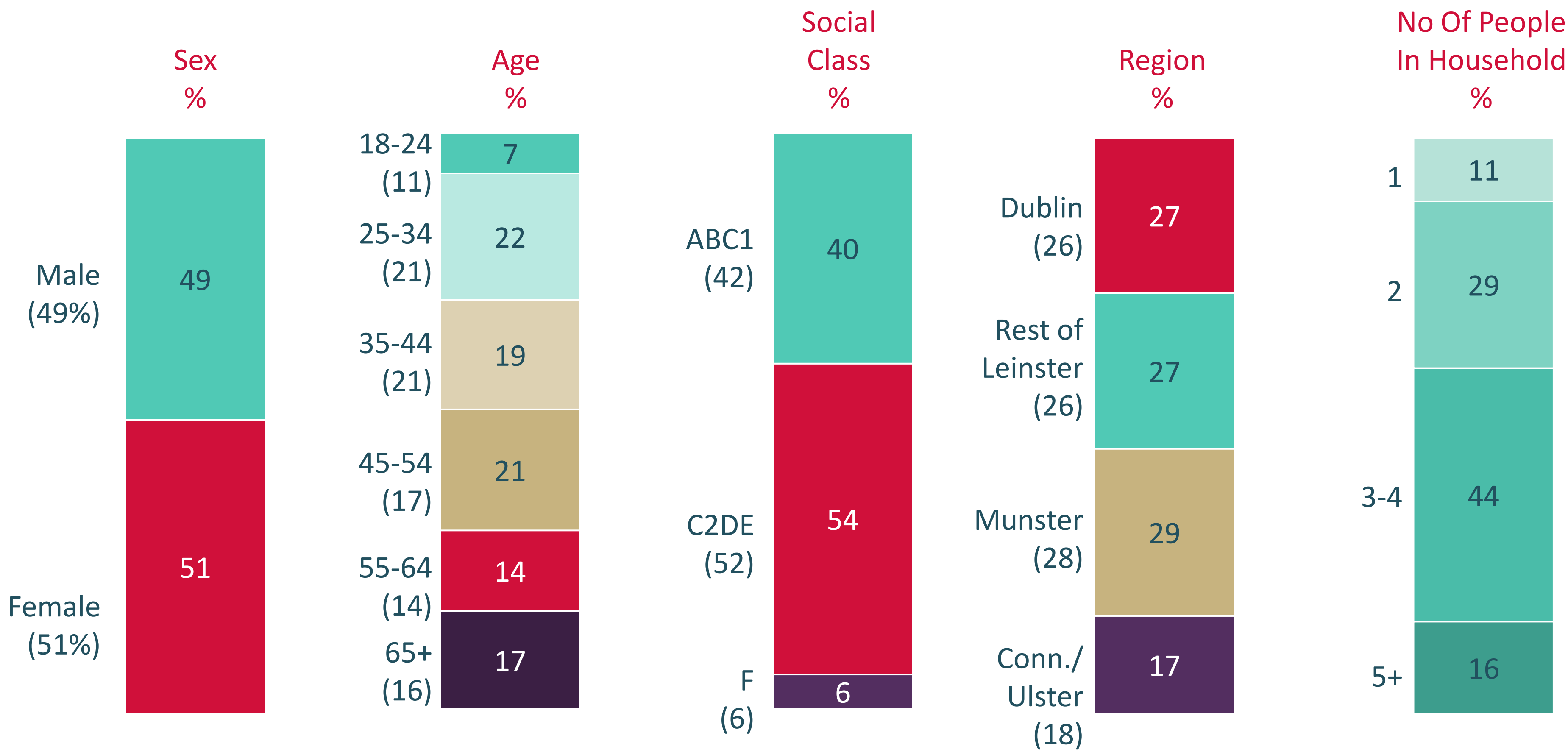
Sample Profile

Sample Profile - I

(Base: All Household Decision Makers 18+ - 1815)



( ) – All Adults 18+

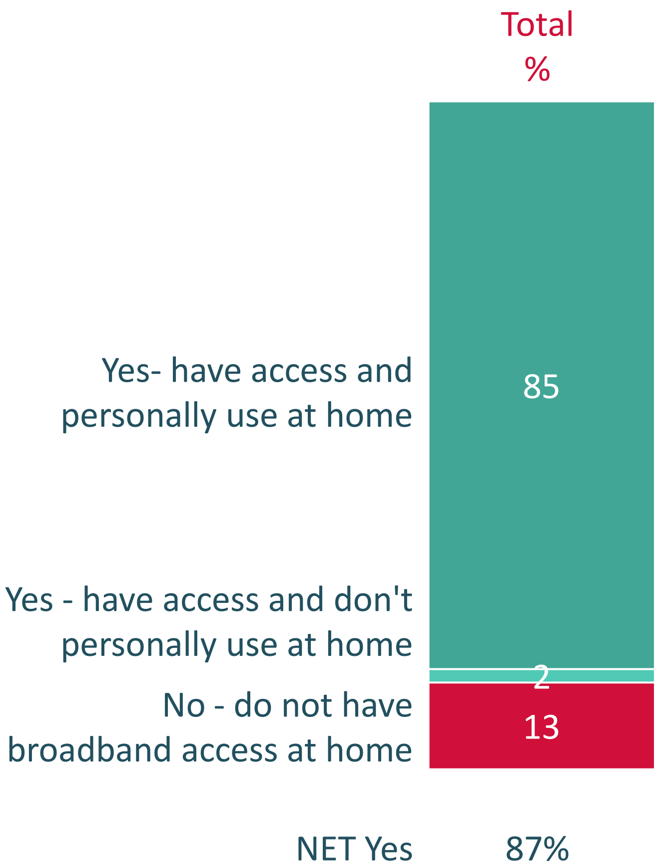
Sample profile is representative of household decision makers with regards to selection of telecommunications suppliers/telecommunications bill payers

Broadband Penetration and Those Without Access

Access to Broadband at Home

(Base: All Household Decision Makers 18+ - 1815)

Q.1 Do you and your household have access to broadband at home?



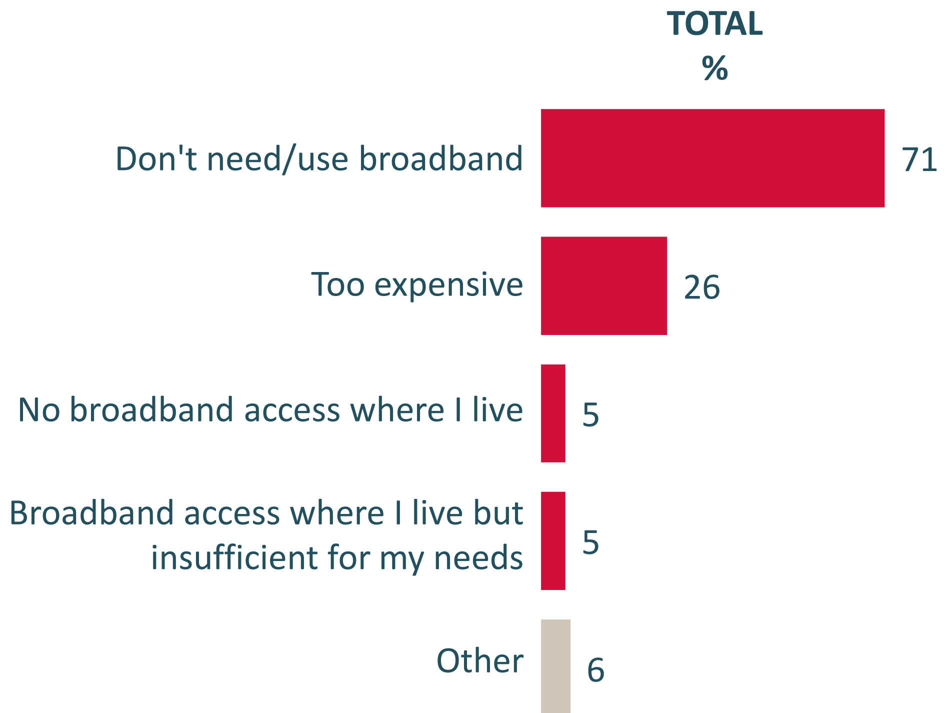
	Total Urban (n=1158) %	Dublin (n=490) %	Total Urban Excl. Dublin (n=668) %	Rural (n=657) %
Yes- have access and personally use at home	88	95	82	80
Yes - have access and don't personally use at home	2	1	3	3
No - do not have broadband access at home	10	4	15	17
NET YES	**90**	**96**	**85**	**83**

87% have broadband access at home. Highest in Dublin at 96% lowest in rural Ireland at 83%.

Reason For Not Having Broadband – Multiple Responses Allowed

(Base: All Without Broadband Access At Home, n=232)

Q.2 Why do you and your household not have broadband access at home?



	Total Urban (n=119) %	Total Dublin (n=18*) %	Total Urban Excl. Dublin (n=100) %	Rural (n=113) %
Don't need/use broadband	75	85	73	66
Too expensive	24	18	25	29
No broadband access where I live	1	-	1	10
Broadband access where I live but insufficient for my needs	3	5	3	7
Other	8	5	8	4

*Note Dublin base small

71% of those without broadband access at home do not have broadband at home as it is not needed or used.

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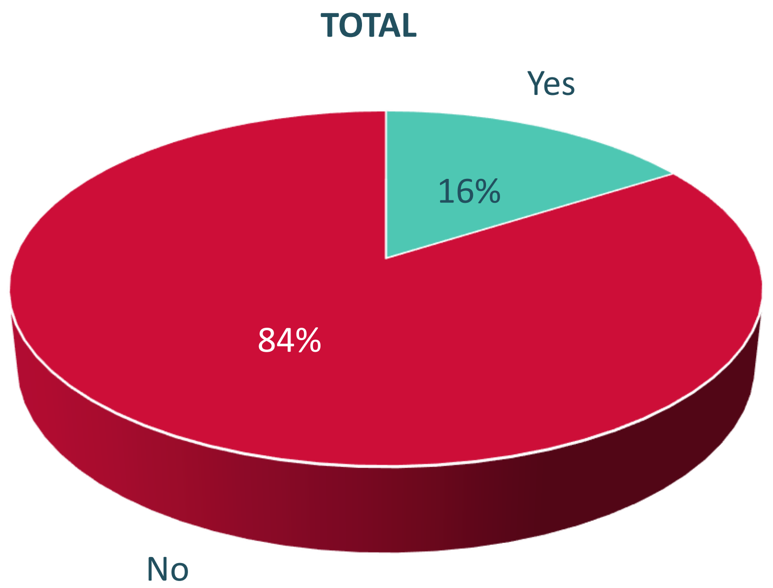
Incidence of Ever Having Broadband

(Base: All Without Broadband Access At Home, n=232)

Q.3 Did you and your household ever have broadband access in your home?



	Total Urban (n=119) %	Dublin (n=18*) %	Total Urban Excl. Dublin (n=100) %	Rural (n=113) %
Yes	20	21	20	13
No	80	79	80	87

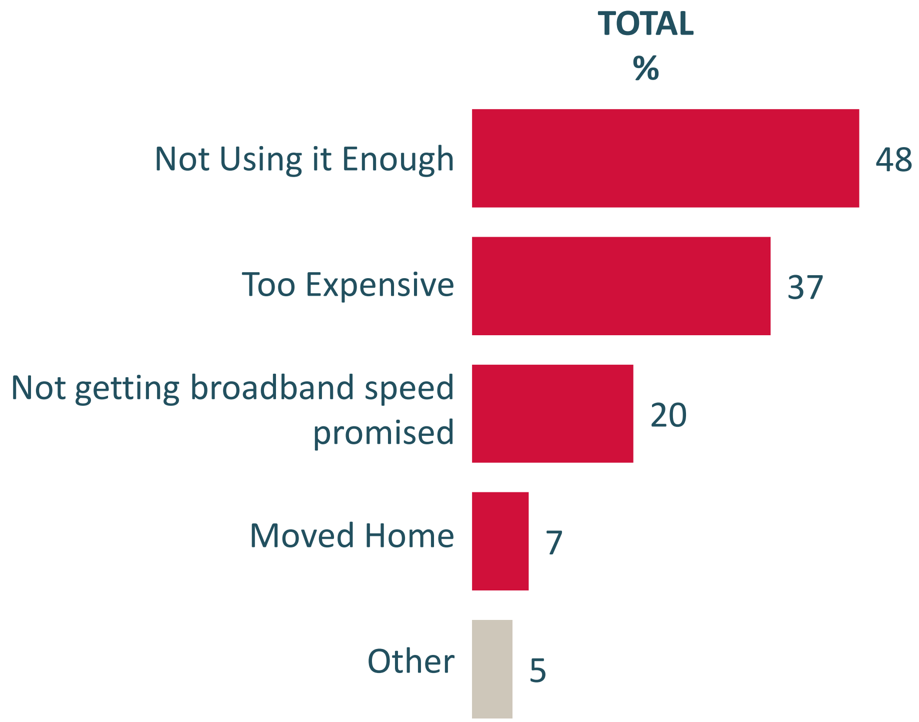
*Dublin base small

16% of those currently without broadband have previous ever had broadband in their home.

Reason for Previously Having Broadband and Not Having Broadband Now – Multiple Responses Allowed?

(Base: All who previously had broadband and do not currently have it n=38)

Q.4 Why do you and your household no longer have broadband access at home when previously you did have it?

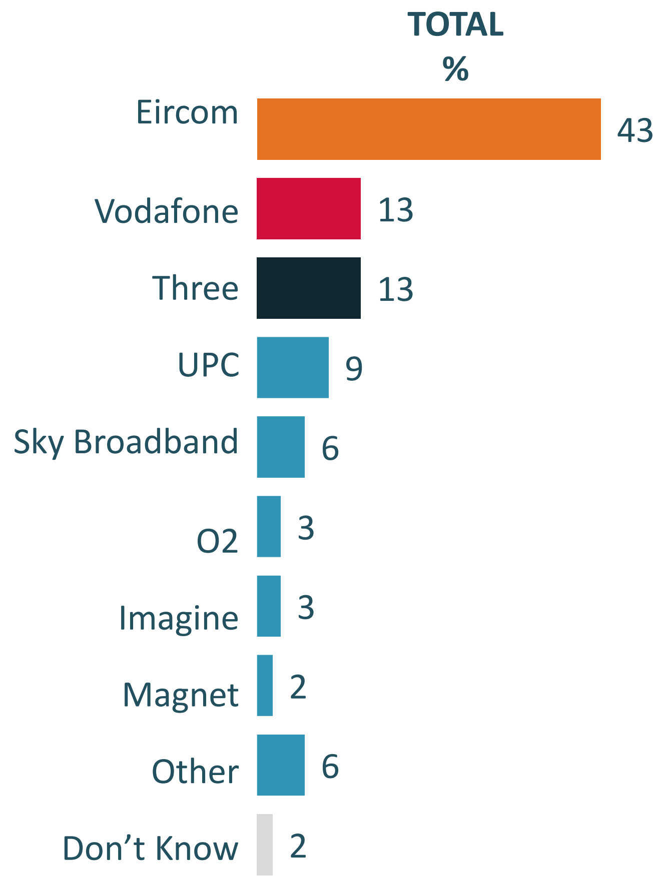


48% of current lapsed broadband users have cancelled broadband because they were not using it. 37% cancelled because of expense

Who Was Your Previous Broadband Supplier?

(Base: All who previously had broadband but don't currently, N=38)

Q.5 Who was your previous broadband supplier?



43% of lapsed broadband users had eircom as their previous broadband supplier

Access to and Usage of Broadband Outside Home

(Base: All Without Broadband Access At Home, n=232)

Q.6 Do you and your household have access to and use BROADBAND outside your home?

	TOTAL %	Total Urban (n=119) %	Dublin (n=18*) %	Total Urban Excl. Dublin (n=100) %	Rural (n=113) %
Any YES	23	18	39	14	28
Yes - In a public facility (college/library)	13	12	19	12	14
Yes - At Work	10	5	17	3	14
Yes - Wi-Fi Hotspot (coffee shop/internet Café)	7	4	11	3	10
No	77	82	61	86	72

*Dublin base small

23% of those households without broadband access at home access broadband outside of the home – most likely in a public facility.

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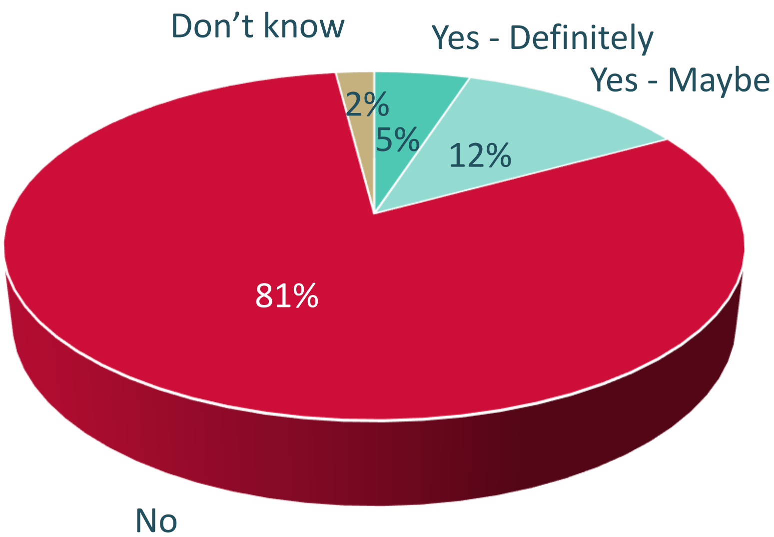
Plan to get Broadband Access in Next 12 Months

(Base: All Without Broadband Access At Home, n=232)

Q.7 Do you and your household plan on getting broadband access at your home in the next 12 months?

TOTAL



ANY YES – 17%

	Total Urban (n=119) %	Dublin Only (n=18*) %	Total Urban Excl. Dublin (n=100) %	Rural (n=113) %
Yes - Definitely	6	4	6	4
Yes - Maybe	13	21	12	10
No	78	76	78	84
Don't know	3	0	3	1
Any Yes	19	24	18	15

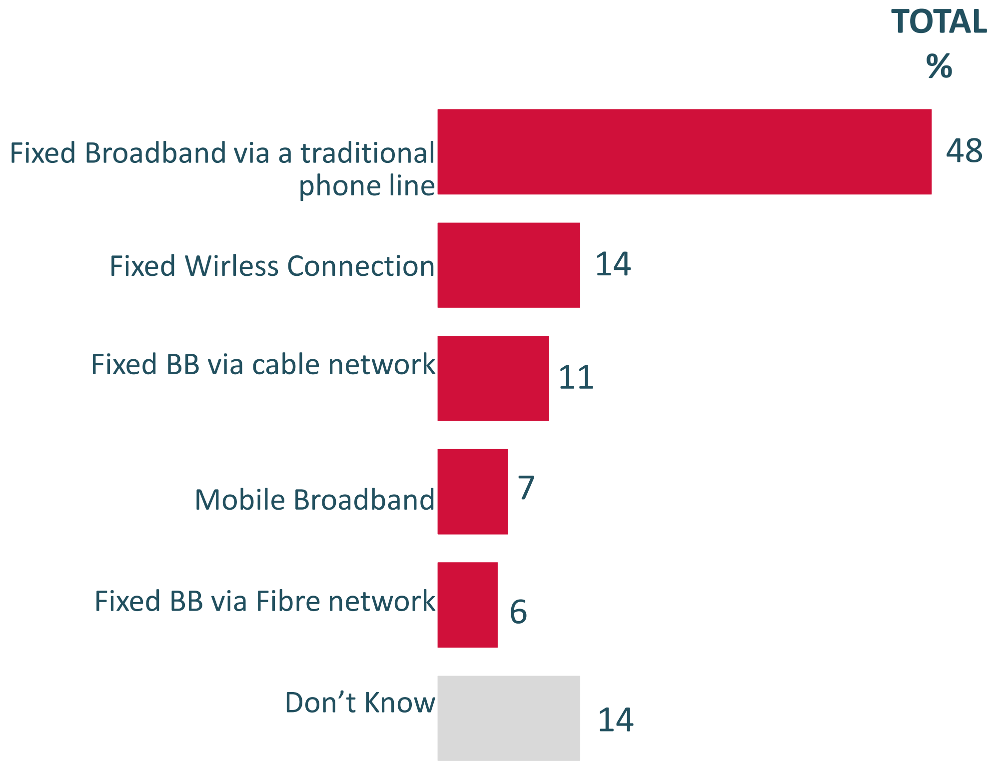
*Dublin base small

17% of those without broadband access plan to get broadband at home in the next 12 months.

Type of Broadband Likely to Get – Broadband Intenders?

(Base: All without broadband who are likely to get it next 12 months – 39*)

Q.8 You mentioned that you and your household are planning on getting broadband in the next 12 months what type of broadband are you **most** likely to get? Single Code



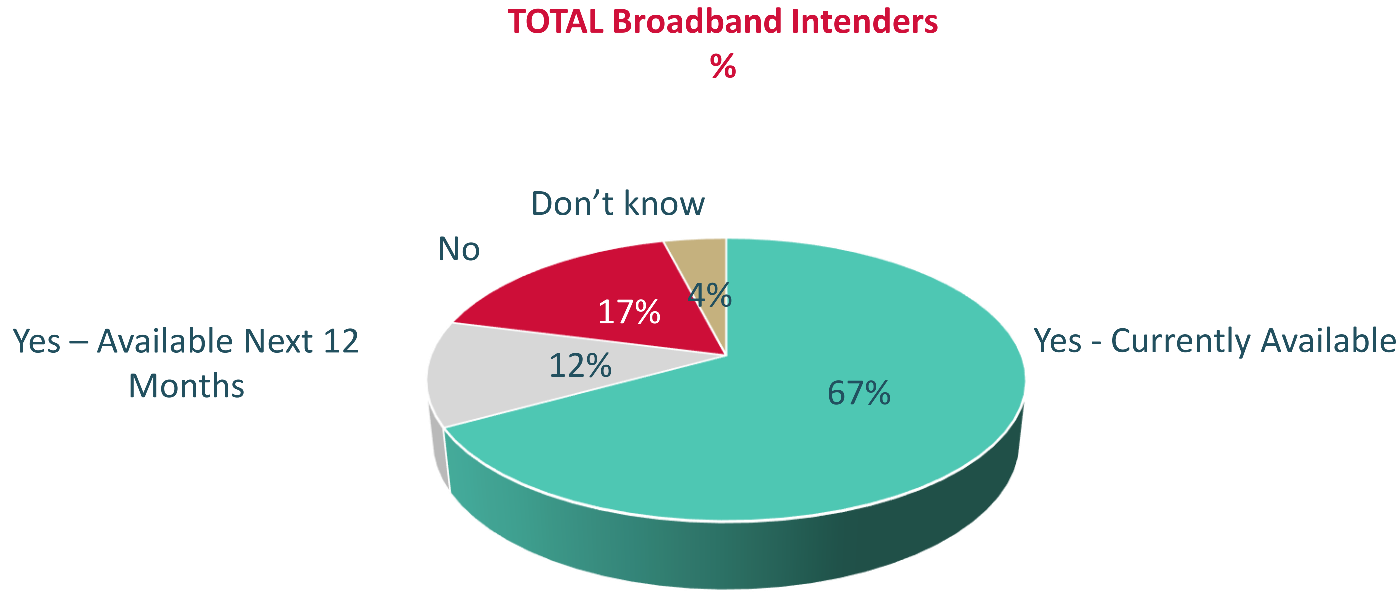
*small base

48% of those intending to get broadband in the next 12 months are likely to get fixed broadband via phone line.

Awareness if Desired Broadband Type is Available in Area

(Base: All Broadband Intenders who know type of broadband they want, N=34*)

Q9 Are you aware if this type of broadband is currently available in your area or will it be available in the next 12 months?



67% of those intending to get broadband know the type of broadband they require is currently available in their area. A further 12% state the access they require will be available in the next 12 months.

Broadband Access and Usage

Means of Accessing Broadband at Home – Multiple Access

(Base: All With Broadband Access At Home, n=1583)

Q.10 Which means of accessing broadband are used in your home?

	Any Access (Multiple Responses) %	Total Urban (n=1040) %	Dublin (n=472) %	Total Urban Excl. Dublin (n=568) %	Rural (n=544) %
Fixed Broadband via a traditional phone line	54	44	27	59	71
Fixed Broadband via a cable	26	38	59	21	2
3G/4G Mobile Broadband (through a dongle attached to computer, Mi-Fi devices, 3G sim card in tablets)	8	6	3	8	12
Fixed Broadband provided by a fibre network	7	8	8	7	5
Mobile Phone using 3G/4G	6	7	2	11	5
Fixed Wireless Connection	4	2	2	2	7
Satellite Broadband	* (n=6)	*	-	*	1

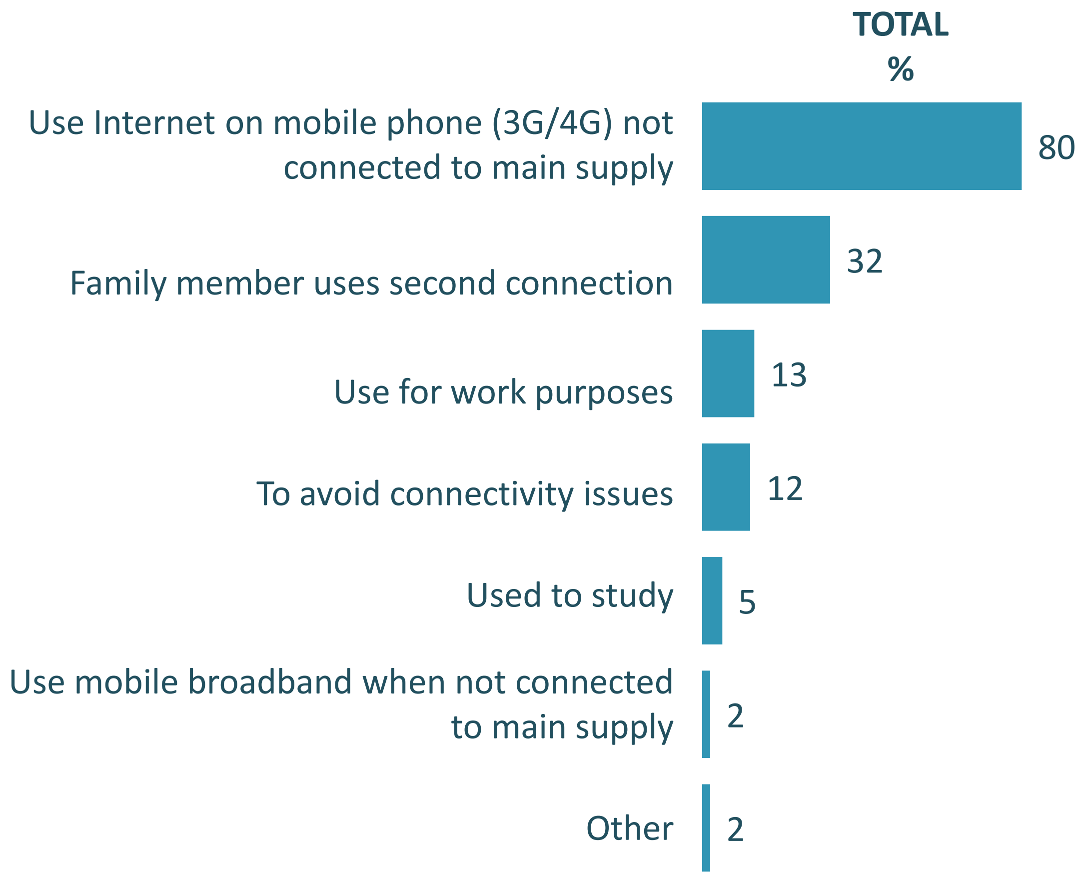
N = 1 Other broadband type
N = 6 Don't Know

54% of those with broadband access via a traditional phone line, highest within Rural areas at 71%. Cable network access highest in Dublin at 59%.

Why Use More than One Means of Accessing Broadband at Home?

(Base: All With More than one Broadband Access platform, N=80)

Q15 Why do you and your household use more than one means of accessing broadband in your home?

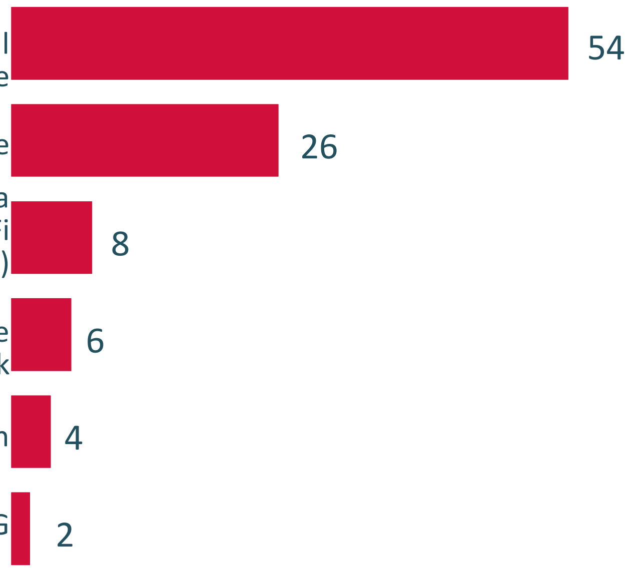


80% of household's claim the reason they use more than one platform to access broadband at home is because they are using the internet on their mobile phone

Most Often Means of Accessing Broadband at Home

(Base: All With Broadband Access At Home, n=1583)

Q.11 Which means of accessing broadband do you and your household use **most often when at home**?



	Primary Access (Singe Code) %	Total Urban (n=1040) %	Dublin (n=472) %	Total Urban Excl. Dublin (n=568) %	Rural (n=544) %
Fixed Broadband via a traditional phone line	54	44	26	59	72
Fixed Broadband via a cable	26	38	59	20	2
3G/4G Mobile Broadband (through a dongle attached to computer, Mi-Fi devices, 3G sim card in tablets)	8	6	3	8	12
Fixed Broadband provided by a fibre network	6	7	7	7	5
Fixed wireless connection	4	2	1	2	7
Mobile Phone using 3G/4G	2	2	2	3	1
Satellite Broadband	* (n=6)	*	-	*	1

N = 1 Other broadband type

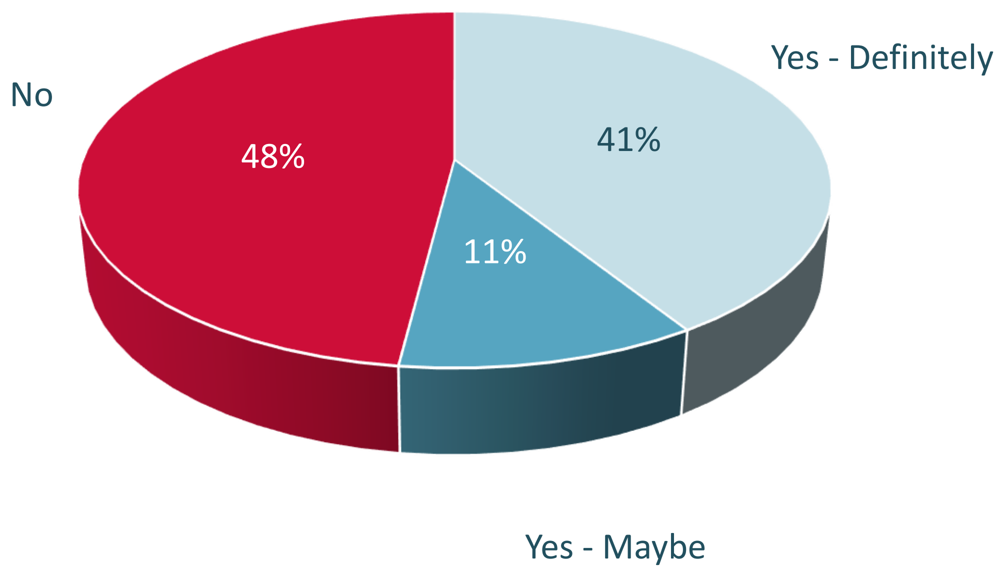
N = 6 Don't Know

Primary means of broadband connection is traditional phone line at 54% nationally. Cable remains most popular means of primary broadband access in Dublin at 59%.

Willingness to Rely on Mobile Broadband as Sole Means of Broadband Access at Home?

(Base: All using mobile broadband as main means of broadband access while using other platforms n=8*)

Q13 Would you and your household be willing to rely on your mobile broadband connection as your sole means of broadband access in the home



*Very small base

41% of those using mobile broadband as main means of access while also using other platforms state they are definitely likely to rely on mobile broadband as their sole means of access.

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Devices Connected To Broadband Service

(Base: All With Broadband Access At Home, n=1583)

Q.16 Which of the following devices are connected to your broadband service and used within your home?

Broadband Primary Connection

	TOTAL Broadband Access %	BB via Traditional Phone (n=851) %	Fibre Network (n=98) %	Cable Network (n=405) %	Mobile broadband (n=126) %	Fixed Wireless (n=58) %	Mobile Phone (n=31*) %	Satellite (n=6*) %
Laptop	86	86	87	87	89	86	57	100
Smartphone	71	68	78	78	74	66	88	85
Tablet	44	46	59	59	44	34	19	37
Desktop Computer	26	25	33	33	33	15	4	12
Gaming Console	25	27	34	34	25	17	14	12
Smart TV	13	12	20	20	17	4	-	12
Mobile Phone (non Smartphone)	13	11	20	20	17	12	6	12
MP3/Digital Music Player	11	10	13	13	15	5	11	12
Mobile gaming device	11	10	17	17	12	8	7	-
Mobile enabled internet device	10	10	19	19	11	4	7	25

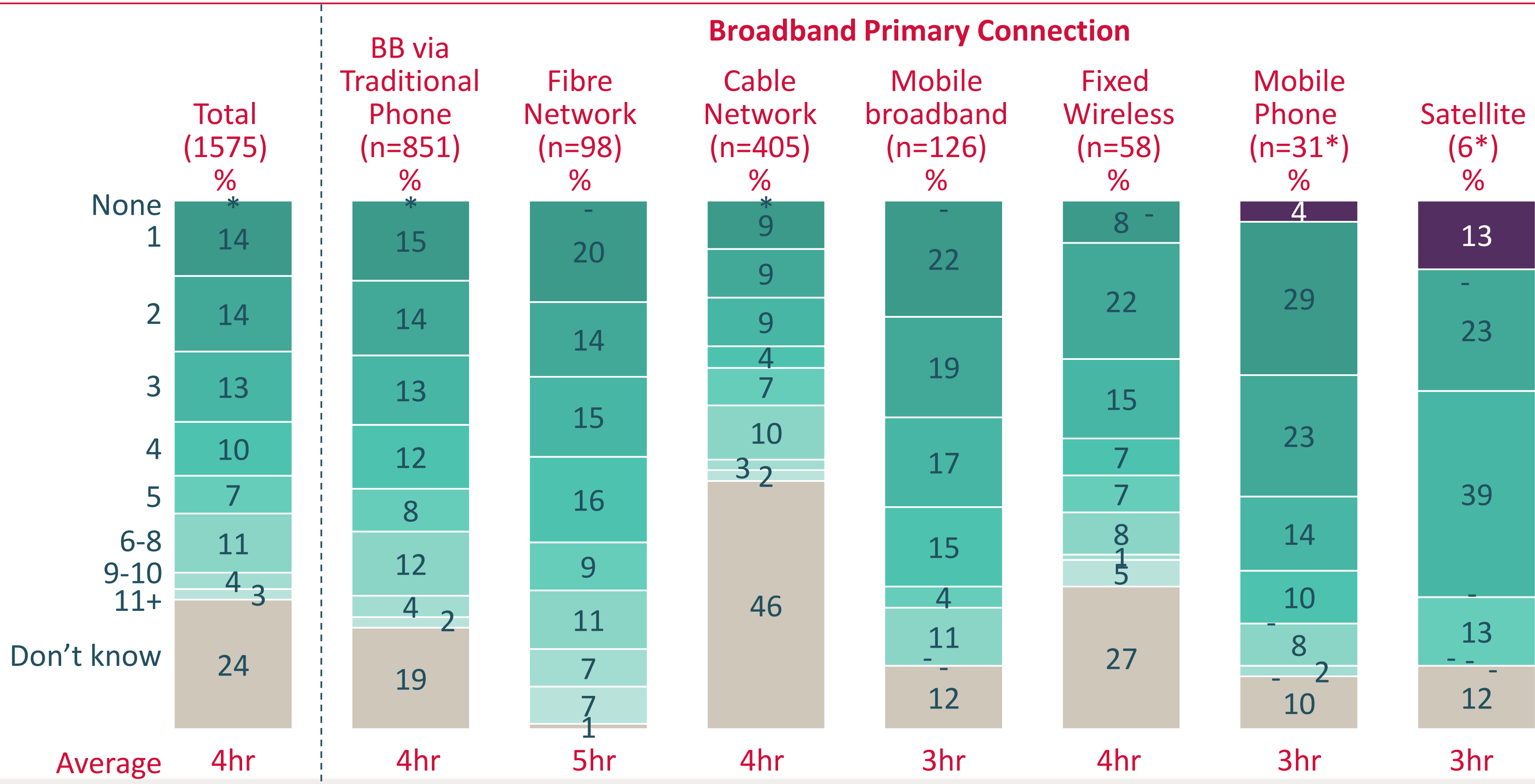
* -Small base

86% state that laptop is connected to broadband service, next most popular device connection is Smartphones (71%) followed by Tablets (44%).

Household Daily Estimate of Time Spent – Primary Access Mode

(Base: Primary access users of each broadband type)

Q18a You mentioned that you and your household access the internet via ….In an average day how many hours do you and your household access via….



* Small base

Fibre Broadband household have the highest estimated time spent online. Lower time estimates where mobile broadband and mobile phone are primary means of connection.

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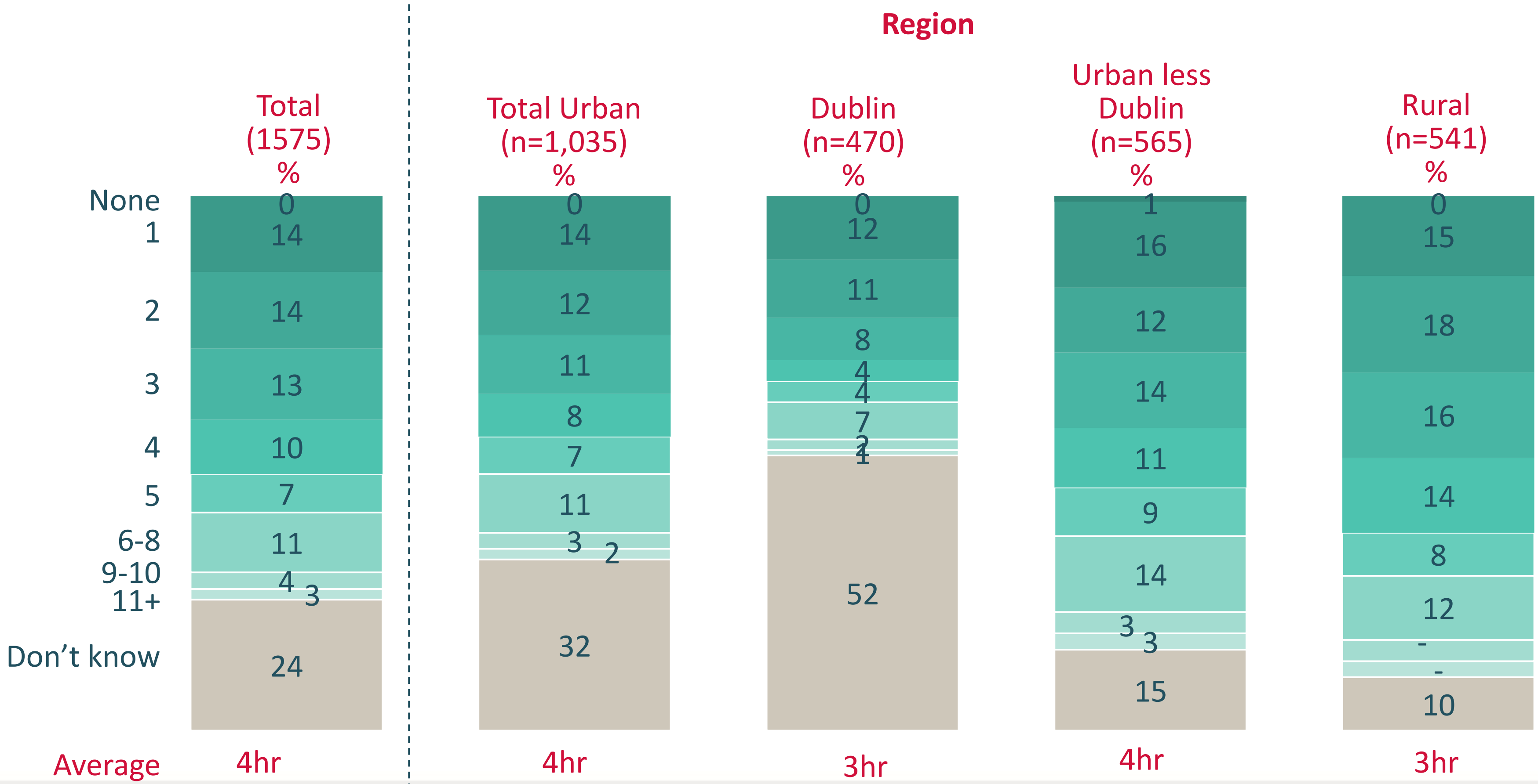
Household Daily Estimate of Time Spent – Primary Access Mode

(Base: Primary access users of each broadband type)

Q18a You mentioned that you and your household access the internet via ….In an average day how many hours do you and your household access via….



* Small base

Average estimate for time spend on primary access to broadband is 4 hours with high levels of don’t know particularly in Dublin.

What Is Your Primary Broadband Access Used For?

(Base: All With Broadband Access At Home, N=1583)

Q.19 What do you and your household use your main broadband access for?

	TOTAL %	Traditional Phone (n=851) %	Fibre Network (n=98) %	Cable Network (n=405) %	Mobile broadband (n=126) %	Fixed Wireless (n=58) %	Mobile Phone (n=31*) %	Satellite (n=6*) %
Browsing the internet	94	93	95	94	93	97	95	100
Using email	78	77	77	84	78	77	59	100
Social Media, Instant Messaging (e.g Facebook, Twitter, Linkedin, Snapchat etc)	69	68	70	67	72	82	69	73
Purchasing goods/ services	57	58	58	55	54	68	43	73
Manage Banking/ Pay Bills/ Other Services	52	53	48	53	39	58	33	85
Using real time video/ voice messaging (eg skype, Viber, Facetime)	39	37	38	47	35	40	22	25
Downloading/ streaming movies music/ TV programmes	29	27	39	32	18	43	21	49
Catch Up TV Services	24	26	28	23	9	36	11	60
Study/ College	24	24	24	21	25	31	19	-
Gaming	21	23	33	19	11	18	21	12
Working at home/ Teleworking	16	18	25	12	5	19	7	25

* Small base

Primary access connection most likely used for general browsing of internet (94%) and using email (78%). Social Media also commonly used at 69%.

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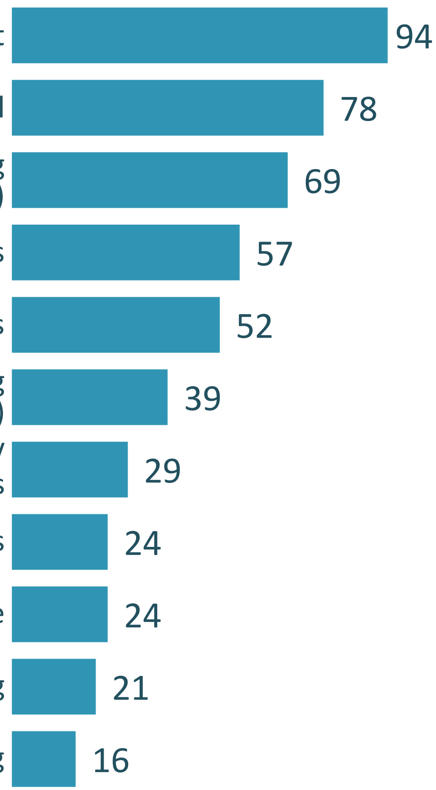
What Is Your Primary Broadband Access Used For?

(Base: All With Broadband Access At Home, N=1583)

Q.19 What do you and your household use your main broadband access for?



	TOTAL %	Total Urban (n=1,040) %	Dublin (n=472) %	Urban less Dublin (n=568) %	Rural (n=544) %
Browsing the internet	94	93	95	92	95
Using email	78	78	90	67	80
Social Media, Instant Messaging (e.g Facebook, Twitter, Linkedin, Snapchat etc)	69	66	65	66	75
Purchasing goods/ services	57	53	52	54	64
Manage Banking/ Pay Bills/ Other Services	52	49	55	44	56
Using real time video/ voice messaging (eg skype, Viber, Facetime)	39	38	45	31	43
Downloading/ streaming movies music/ TV programmes	29	28	27	30	30
Catch Up TV Services	24	22	21	22	28
Study/ College	24	22	20	23	28
Gaming	21	20	16	23	23
Working at home/ Teleworking	16	13	14	12	21

Primary access connection most likely used for general browsing of internet (94%) and using email (78%). Social Media also commonly used at 69%.

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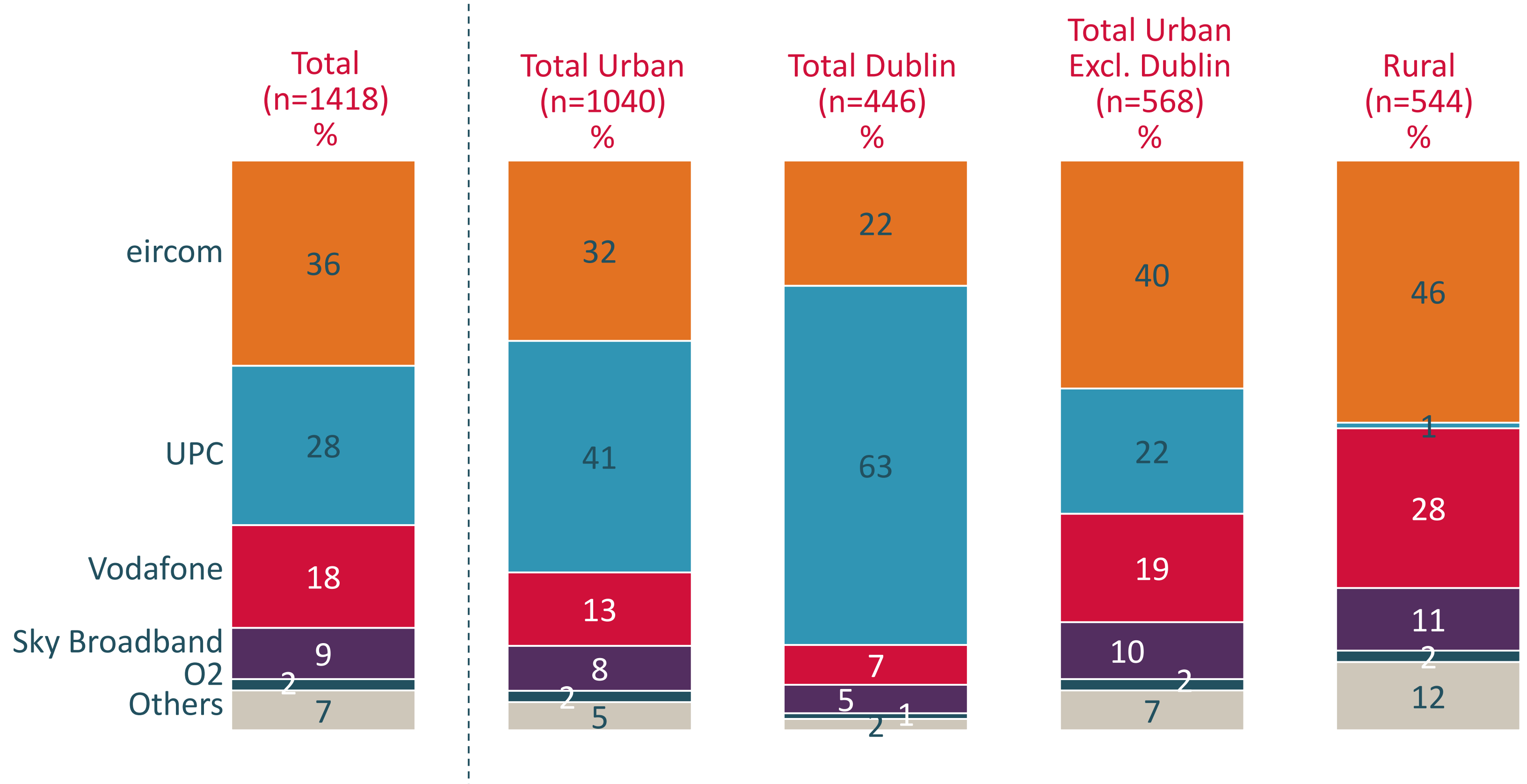
Suppliers

Current Primary Access Broadband Supplier – Fixed Line/Satellite/ Wireless Access

(Base: All Main Broadband Access who is Fixed Line/Satellite/Fixed Wireless, n-1418)

Q.20 You mentioned earlier that you had broadband access provided over ….. What company do you currently use as your main home broadband provider?



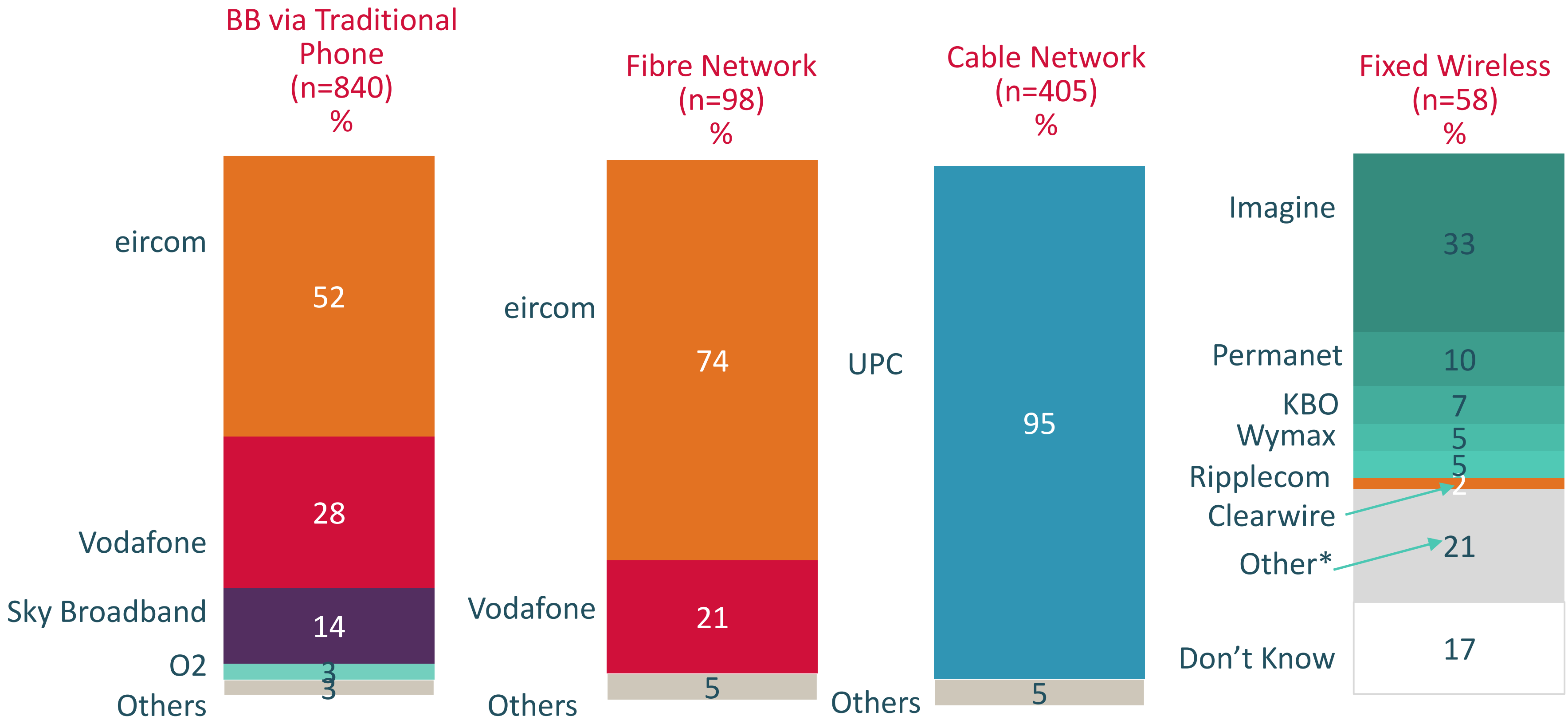
Others – Imagine n =19, Digiweb/Smart n=16, IFA N=6, Permanet n=6, Casey's n=5, IFA n=4

Eircom share nationally is 36% as primary access supplier. UPC has 63% share in Dublin and 41% share in the wider urban market.

Current Primary Access Broadband Supplier x Platform

(Base: All Main Broadband Access who is Fixed Line/Satellite/Fixed Wireless, n-1418)

Q.20 You mentioned earlier that you had broadband access provided over ….. What company do you currently use as your main home broadband provider?



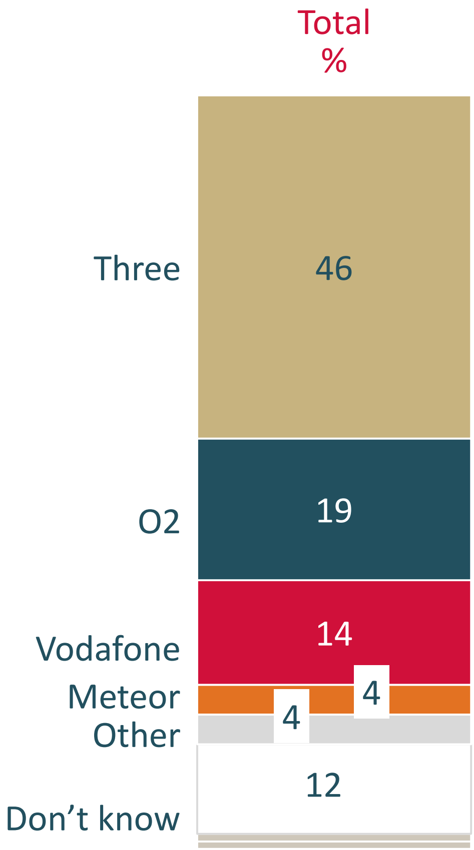
* - SkyTel n=2, Bbnet n=2, Lightnet n=1 Rocket n=1

Eircom has lead share in BB via traditional phone and Fibre. UPC share in the bb via cable network stands at 95%.

Main Mobile Broadband Supplier?

(Base: All Who Use 3G/4G Mobile Broadband, n=130)

Q.22 What company do you currently use as your main mobile broadband supplier?



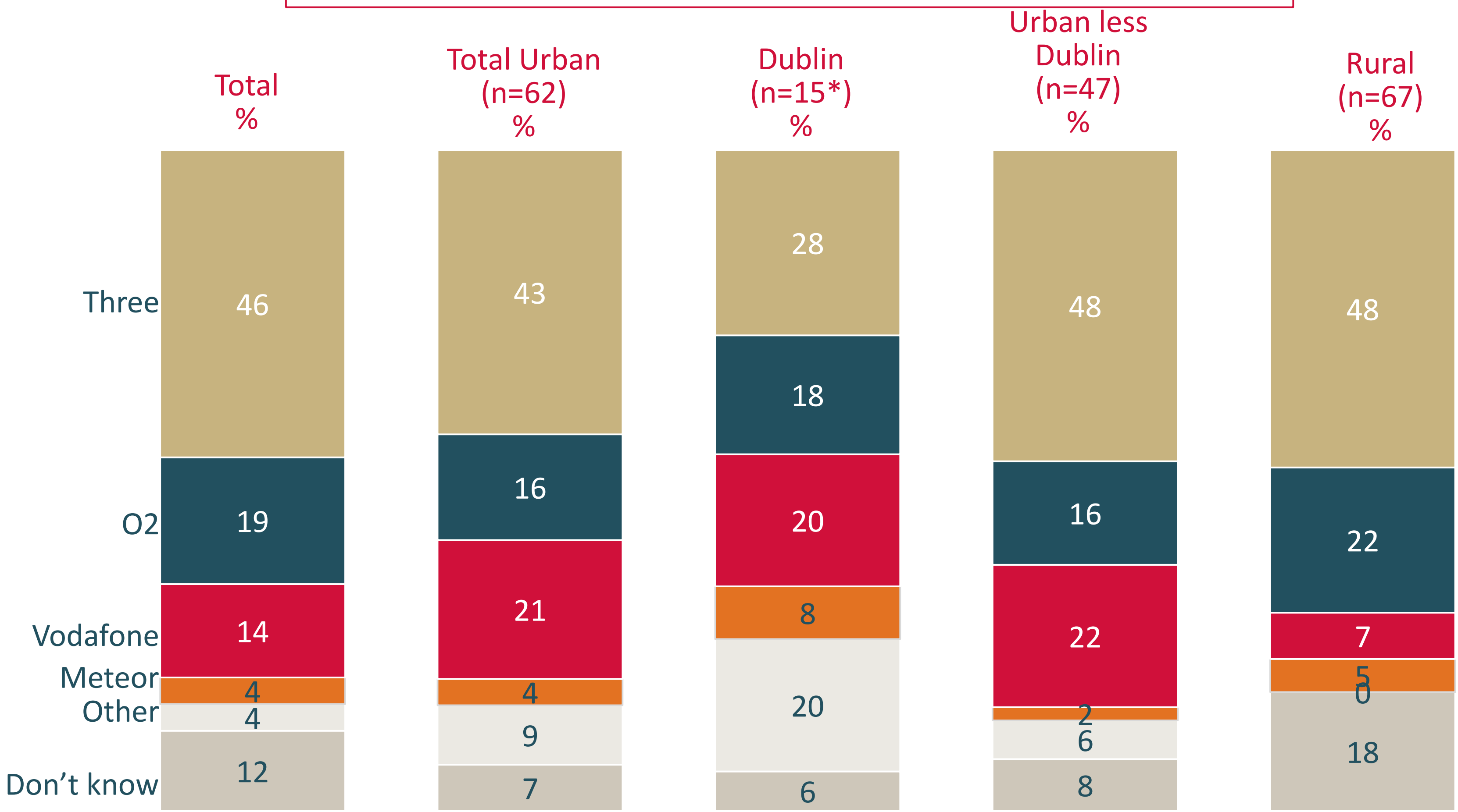
Respondents stating Three in rural areas were asked were they part of the National Broadband Scheme
Yes 20%
No 52%
Don't Know 28%

Three have 46% share in the Mobile Broadband market. Within rural areas 20% of Three customers stated their broadband was part of the National Broadband scheme.

Main Mobile Broadband Supplier?

(Base: All Who Use 3G/4G Mobile Broadband, n=130)

Q.22 What company do you currently use as your main mobile broadband supplier?



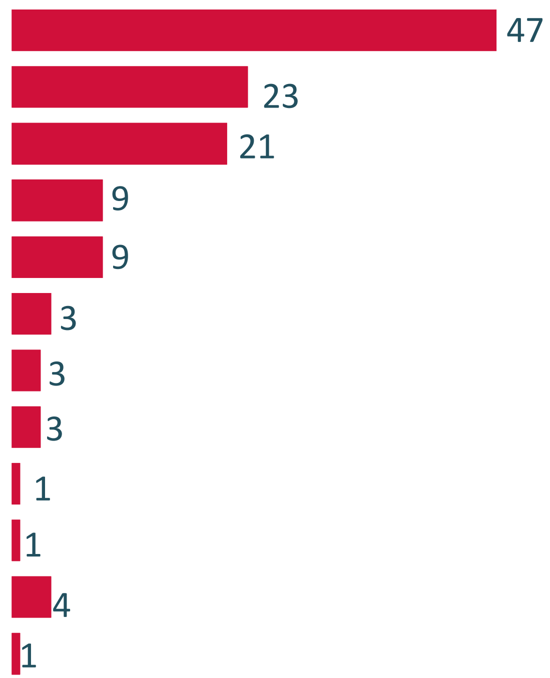
* Small base

Three market share is highest outside of the Dublin area with 48% share in rural Ireland.

Which TV Companies or Services are Used?

(Base: All Household Decision Makers 18+ - 1815)

Q.23 Which of the following companies or services do you and your household use to watch TV programmes or access TV services? Which Others?



	Total Mention %	Total Urban (n=1158) %	Dublin (n=490) %	Total Urban Excl. Dublin (n=668) %	Rural (n=657) %
Sky	47	39	26	49	60
UPC	23	35	59	17	3
Saorview	21	14	6	21	34
Freesat	9	7	4	10	11
Netflix	9	11	11	10	5
Catch Up Players	3	4	1	6	3
eVision	3	4	3	4	2
Access via internet	3	4	1	6	2
Saorsat	1	0	0	1	3
Other	1	1	0	2	1
Do not have a TV Subscription	4	5	5	4	3
Don't Know	1	1	0	1	2

Sky have the largest share of the TV services market nationally, 47%, driven by high share in rural areas 60%. UPC lead the market in Dublin at 59%.

Which TV Companies or Services are Used?

(Base: All Household Decision Makers 18+ - 1815)

Q.23 Which of the following companies or services do you and your household use to watch TV programmes or access TV services? Which Others?

	Total Mention %	BB Trad Phone (n=851) %	Fibre Network (n=98) %	Cable Network (n=405) %	Mobile BB (n=126) %	Fixed Wireless (n=58)	Mobile Phone (n=31)	BB Satellite (n=6)
Sky	47	66	52	7	51	63	47	87
UPC	23	5	9	81	7	8	2	-
Saorview	21	23	17	3	26	37	7	24
Freesat	9	11	6	2	11	9	15	-
Netflix	9	9	17	15	3	6	3	12
Catch Up Players	4	5	5	4	2	2	-	-
eVision	3	4	17	-	-	-	-	-
Access via internet	3	4	7	3	1	3	4	-
Saorsat	1	1	2	*	3	2	4	-
Do not have a TV Subscription	4	2	4	6	8	2	21	13
Don't Know	1	1	1	1	3	2	-	-

Sky have the largest share of the TV services market nationally, 47%, driven by high share in rural areas 60%. UPC lead the market in Dublin at 59%.

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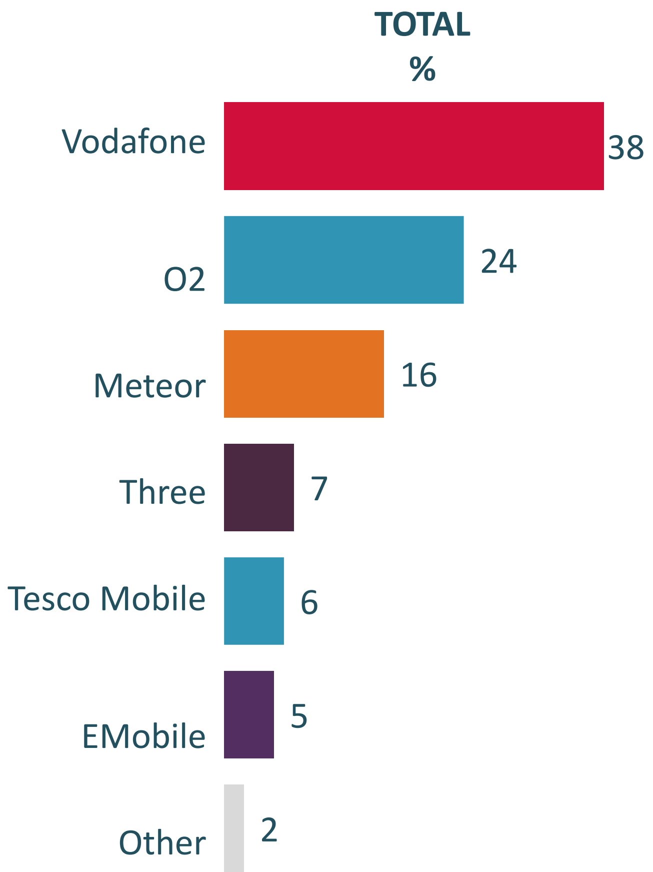
Mobile Phone Supplier – Based on Household Decision Makers?

(Base: All Household Decision Makers, N=1,815)

Q21What company provides you with your personal main mobile phone service?



	Total Urban (n=1,158) %	Dublin (n=490) %	Urban less Dublin (n=668) %	Rural (n=657) %
Vodafone	34	33	35	45
O2	24	21	26	24
Meteor	18	22	16	12
Three	9	10	8	5
Tesco Mobile	6	6	6	6
EMobile	4	3	5	5
Other	3	3	2	2

2% of respondents claim they do not have a mobile phone

Figures not reflective of actual market share data as sample is based on household decision makers of data connectivity services in the home.

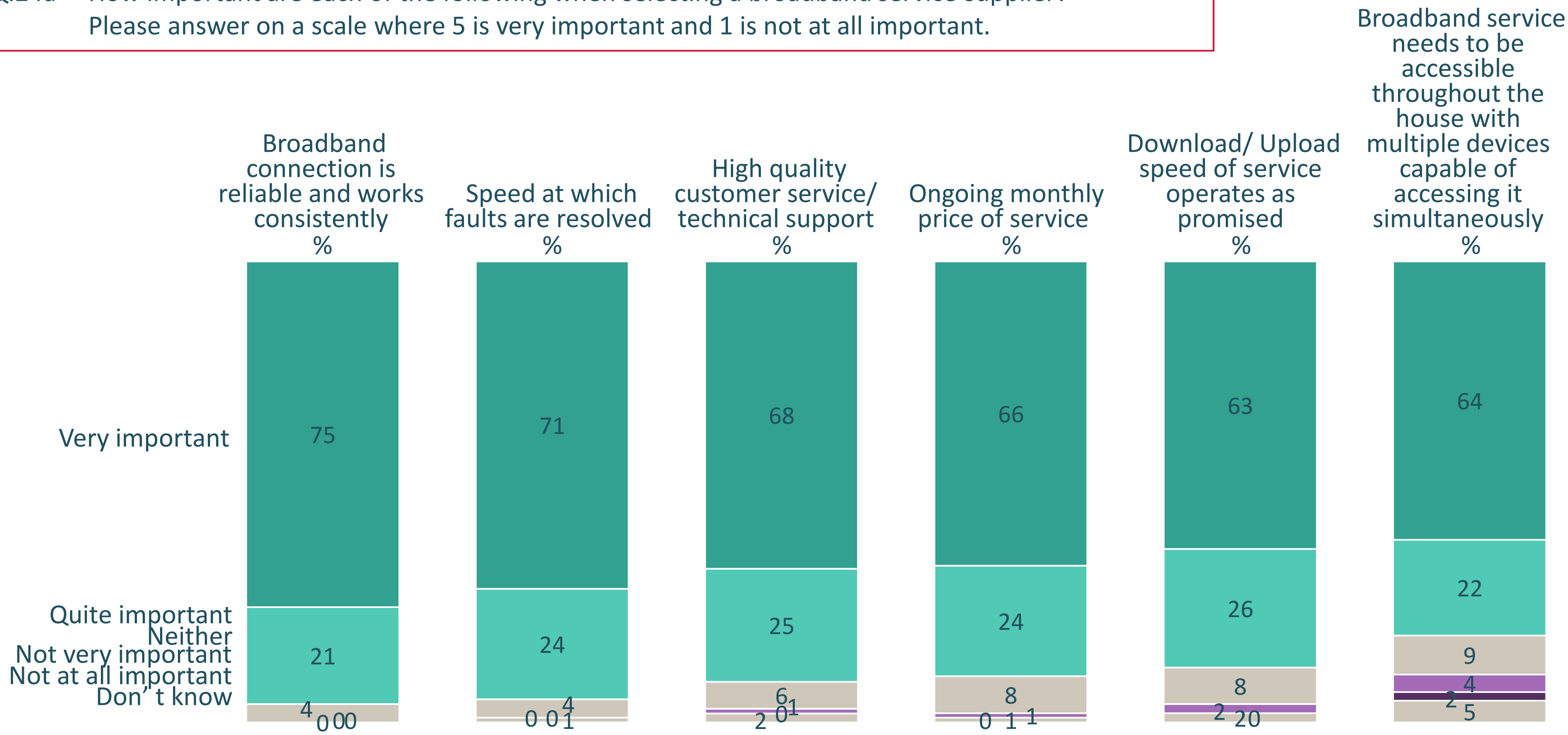
* Small base

Importance and Satisfaction with Supply

Importance When Selecting A Broadband Supplier? - I

(Base: All Respondents Who have Broadband Access At Home ex Mobile Phone Access, n=1552)

Q.24a How important are each of the following when selecting a broadband service supplier?
Please answer on a scale where 5 is very important and 1 is not at all important.



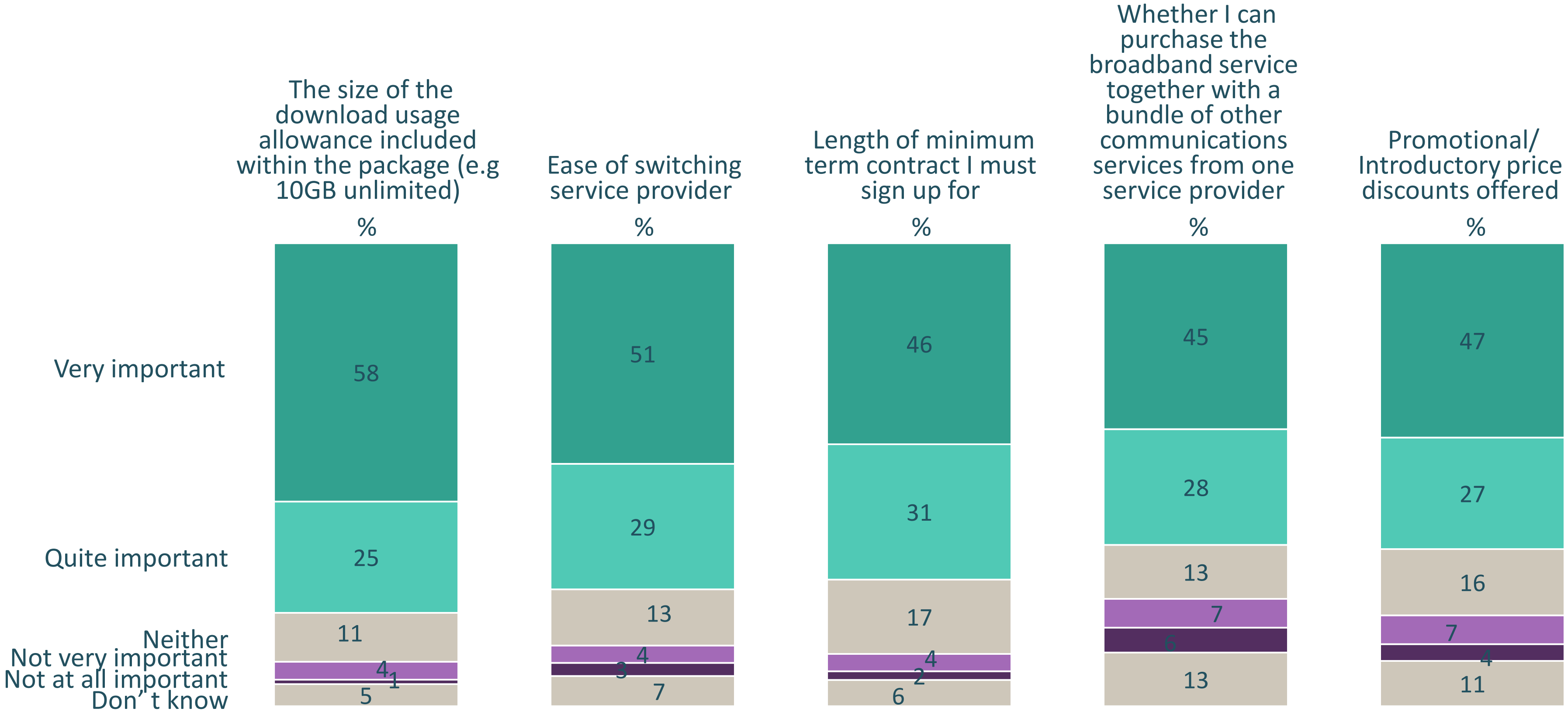
Reliability of connection is most important aspect in selection of broadband supplier, 75% top box. Other aspects stated as important Faults resolution, high quality customer service and price of service.

REDC

Importance When Selecting A Broadband Supplier? - II

(Base: All Respondents Who have Broadband Access At Home ex Mobile Phone, n=1554)

Q.24a How important are each of the following when selecting a broadband service supplier? Please answer on a scale where 5 is very important and 1 is not at all important.



Other aspects deemed less important included promotions/introductory discounts, availability of bundle options and contract length.

Importance When Selecting A Broadband Supplier?

(Base: All Respondents Who have Broadband Access At Home ex Mobile Phone, n=1554)

Q.24a How important are each of the following when selecting a broadband service supplier? Please answer on a scale where 5 is very important and 1 is not at all important.

	TOTAL Any Broadband Connection 4-5 Score %	Traditional Phone (n=851) %	Fibre Network (n=98) %	Cable Network (n=405) %	Mobile broadband (n=126) %	Fixed Wireless (n=58) %	Satellite (n=6) %
Broadband connection is reliable and works consistently	96	96	94	97	96	93	100
Speed at which faults are resolved	95	96	93	96	94	91	100
High quality customer service/technical support	93	93	89	93	95	90	100
Ongoing monthly price of service	90	91	87	89	91	91	88
Download/Upload speed operates as promised	89	89	89	88	94	88	100
Accessible throughout the house, multiple devices capable of accessing	86	86	87	90	75	85	85
Size of download usage allowed	83	82	84	84	93	82	87
Ease of switching service provider	80	80	77	80	80	79	100
Length of minimum term contract	77	80	70	74	82	69	75
Promotional/Introductory price discount offered	74	76	66	71	70	75	88
Whether I can purchase broadband as part of a bundle	74	74	64	82	55	66	87

Note: Mobile Phone 3G/4G not included at this question

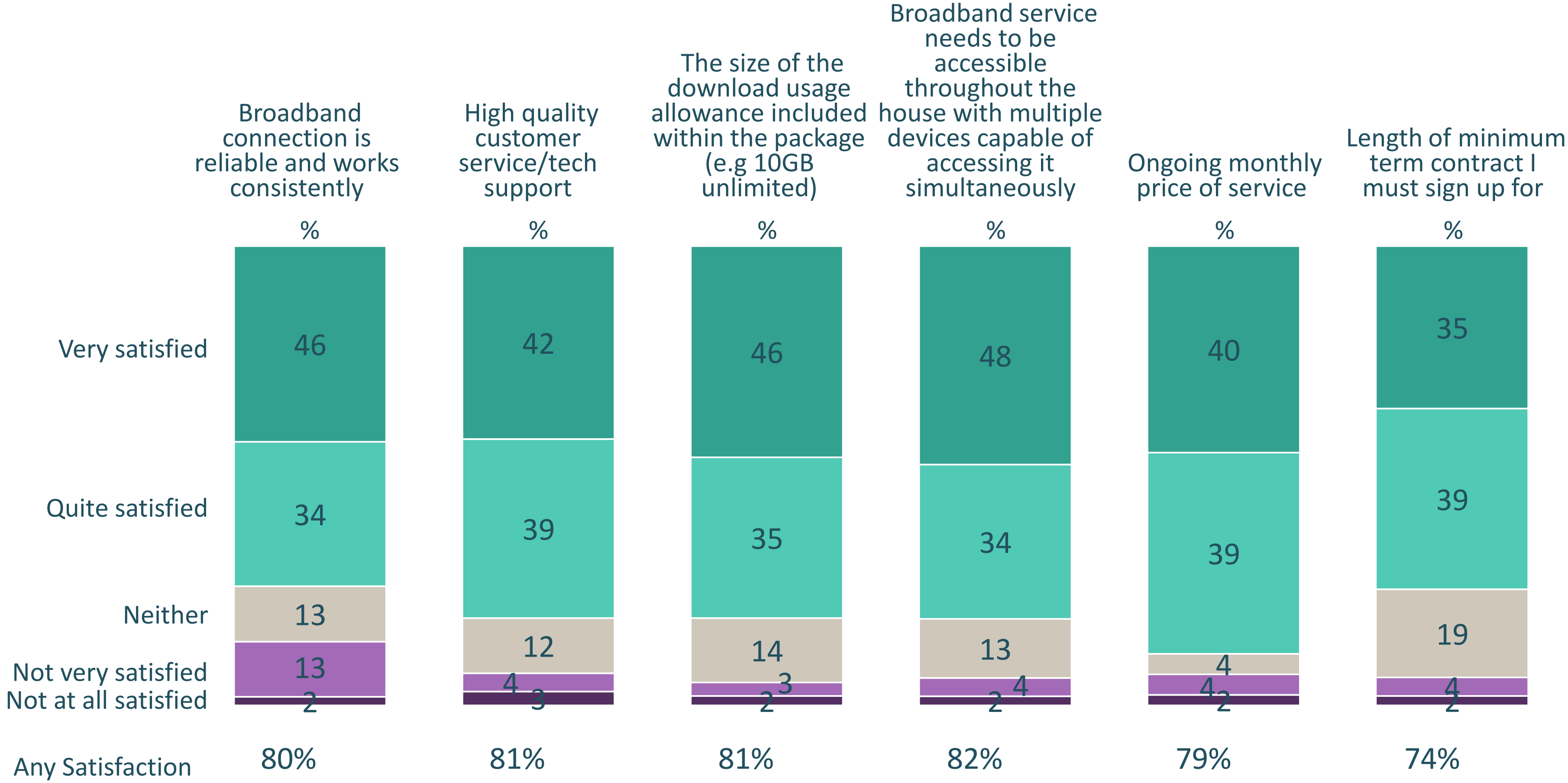
Consideration for the importance of these variables is higher among those using mobile broadband as a primary connection – example size of download allowance 93% state as important versus 83% for any broadband.

REDC

Satisfaction With Primary Broadband Supplier? - I

(Base: All Respondents Who have Broadband Access At Home ex Mobile Phone, n=1554)

Q.24b Thinking about your main broadband supplier - how satisfied are you/household with each aspect of the service they provide?

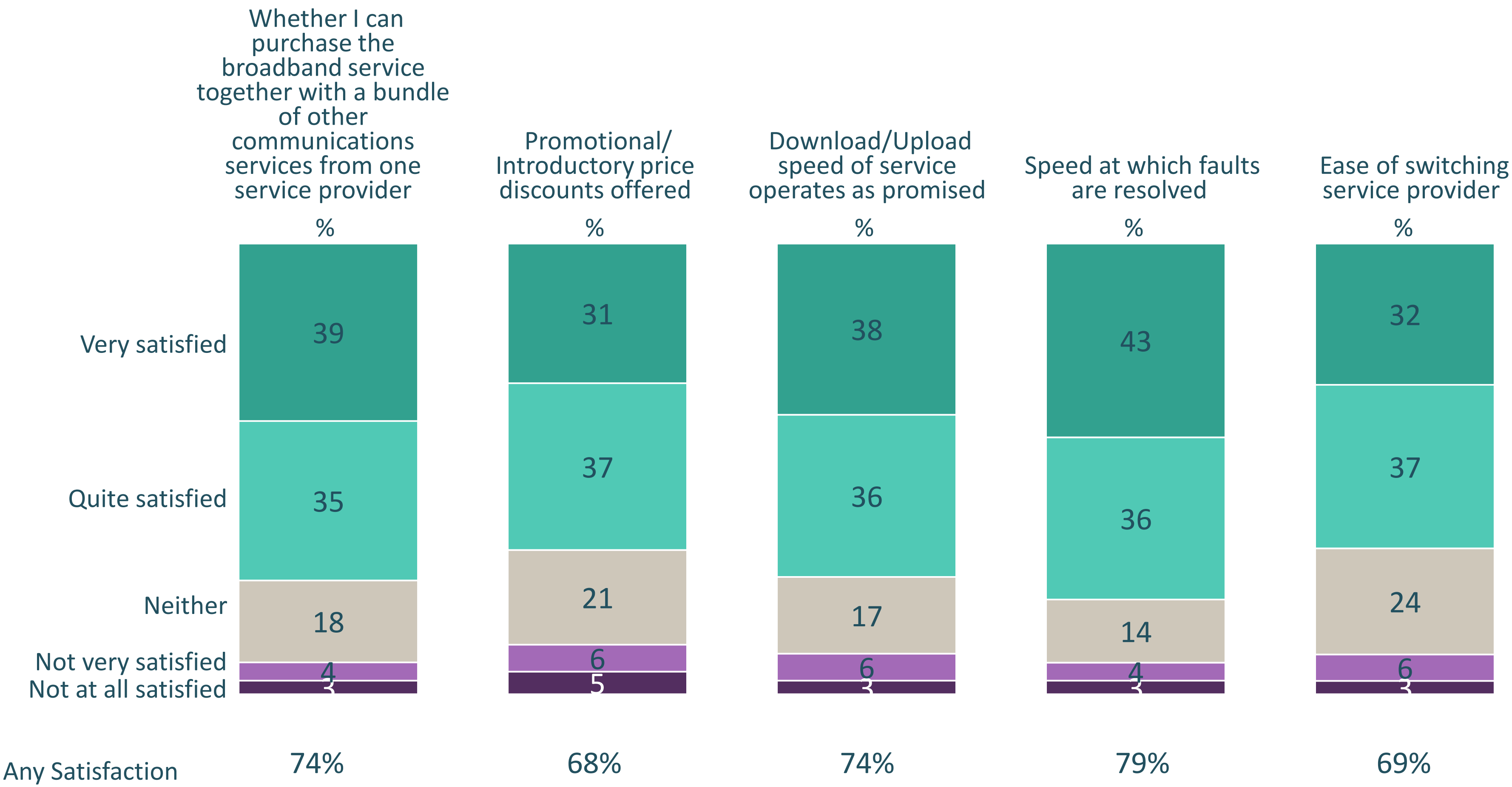


Any Satisfaction with suppliers highest for accessibility of service throughout the house (82%), size of download allowance (81%) and reliability of connection (80%) and quality customer care (81%)

Satisfaction With Broadband Supplier? - II

(Base: All Respondents Who have Broadband Access At Home ex Mobile Phone, n=1554)

Q.24b Thinking about your main broadband supplier - how satisfied are you/household with each aspect of the service they provide?



Satisfaction with suppliers lowest in the areas of promotional/introductory prices (68%) and ease of switching supplier (69%)

Satisfaction With Broadband Supplier?

(Base: All Respondents Who have Broadband Access At Home ex Mobile Phone, n=1554)

Q.24b Now thinking about (INSERT Supplier) who is your main supplier of broadband. How satisfied are you and your household with each aspect of the service they provide. Please answer on a scale where 5 is very satisfied and 1 is not at all satisfied.

	TOTAL 4 -5 Score %	Eircom (n=512) %	UPC (n=397) %	Vodafone (n=257) %	Sky (n=123) %
Broadband connection is reliable and works consistently	80	78	87	77	84
Speed at which faults are resolved	79	79	83	77	83
High quality customer service/technical support	81	81	83	81	87
Ongoing monthly price of service	80	78	82	83	82
Download/Upload speed operates as promised	74	69	86	71	80
Accessible throughout the house, multiple devices capable of accessing	82	80	89	84	88
Size of download usage allowed	82	81	86	84	84
Ease of switching service provider	68	66	69	74	72
Length of minimum term contract	75	75	77	74	81
Promotional/Introductory price discount offered	68	69	74	69	68
Whether I can purchase broadband as part of a bundle	74	74	87	75	79

UPC satisfaction score 87% for broadband connection reliability.
Download/Upload speed as promised highest for UPC at 86%.

Satisfaction With Broadband Supplier?

(Base: All Respondents Who have Broadband Access At Home ex Mobile Phone, n=1554)

Q.24b Now thinking about (INSERT Supplier) who is your main supplier of broadband. How satisfied are you and your household with each aspect of the service they provide. Please answer on a scale where 5 is very satisfied and 1 is not at all satisfied.

	TOTAL 4 -5 Score %	BB Trad Phone (n=851) %	Fibre Network (n=98) %	Cable Network (n=405) %	Mobile BB (n=126) %	Fixed Wireless (n=58*) %	Mobile Phone (n=31*) %	BB Satellite (n=6*) %
Broadband connection is reliable and works consistently	80	78	79	87	73	67	82	76
Speed at which faults are resolved	79	80	72	83	76	68	75	76
High quality customer service/technical support	81	83	75	83	73	77	74	100
Ongoing monthly price of service	80	81	71	82	74	70	82	48
Download/Upload speed operates as promised	74	71	75	87	66	63	72	51
Accessible throughout the house, multiple devices capable of accessing	82	81	88	89	70	74	50	88
Size of download usage allowed	82	81	87	86	76	71	78	51
Ease of switching service provider	68	69	64	70	66	52	70	100
Length of minimum term contract	75	76	70	77	72	63	69	36
Promotional/Introductory price discount offered	68	69	61	74	59	57	37	36
Whether I can purchase broadband as part of a bundle	74	74	68	87	54	56	56	51

* Small base

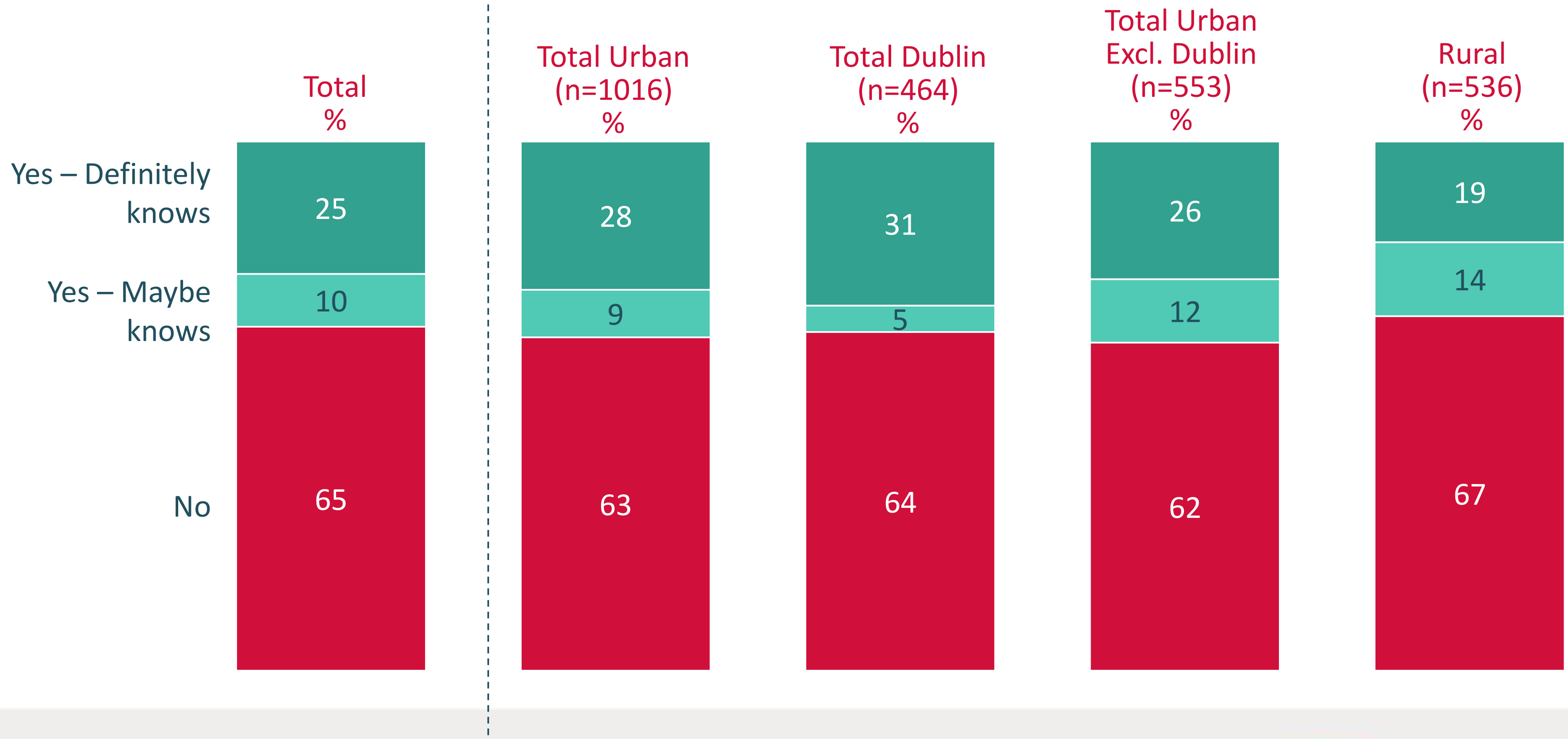
Satisfaction rates with suppliers are generally higher for those with Cable access.

Knowledge of Speed of Supply

Knowledge Of Claimed Maximum Download Speed

(Base: All Respondents with Broadband Access ex Mobile Phone users n=1552)

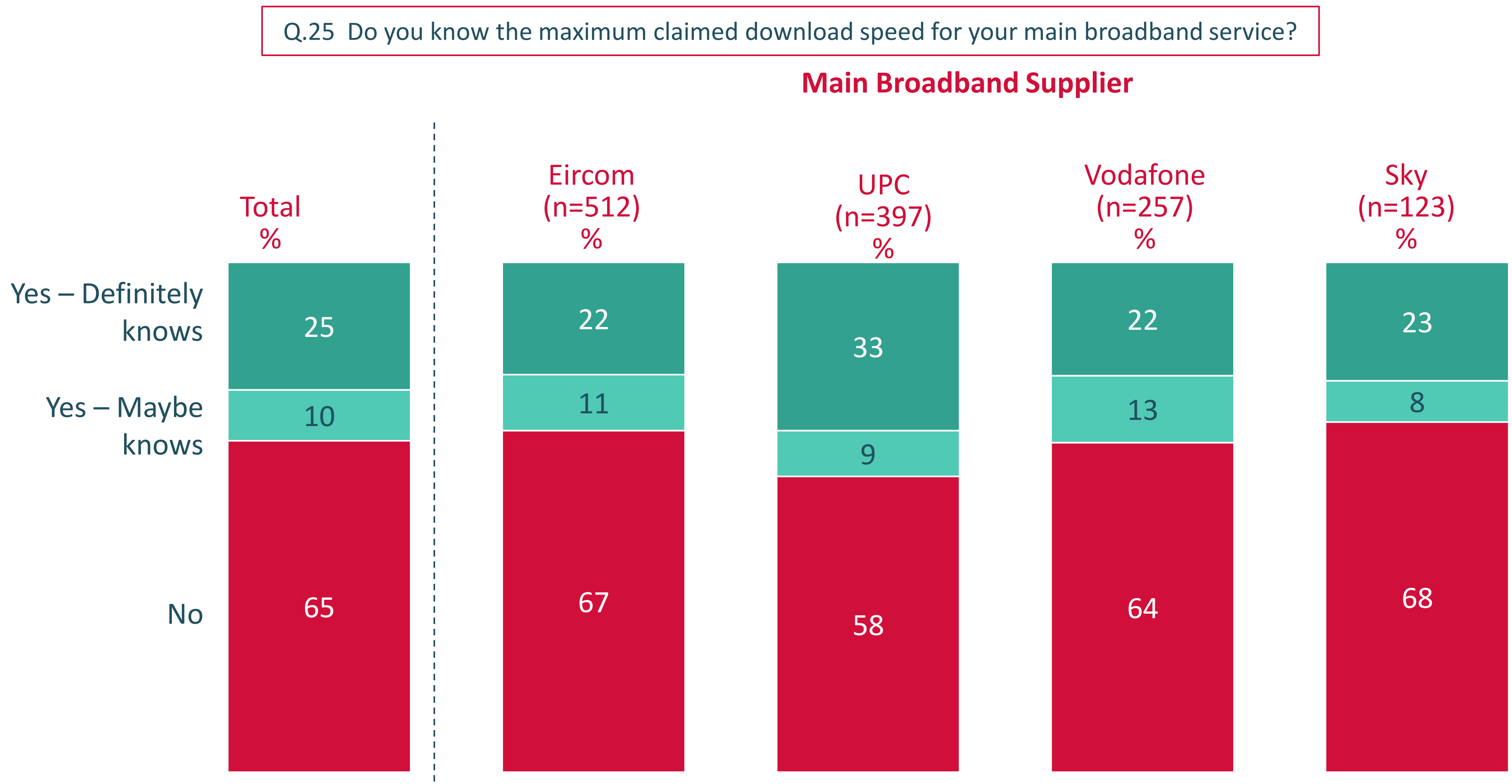
Q.25 Do you know the maximum claimed download speed for your main broadband service?



25% of decision makers claim they definitely know the download speed of service. Slightly higher in Dublin at 31%.

Knowledge Of Claimed Maximum Download Speed

(Base: All Respondents who know primary broadband access, n=1552)



* - Small base

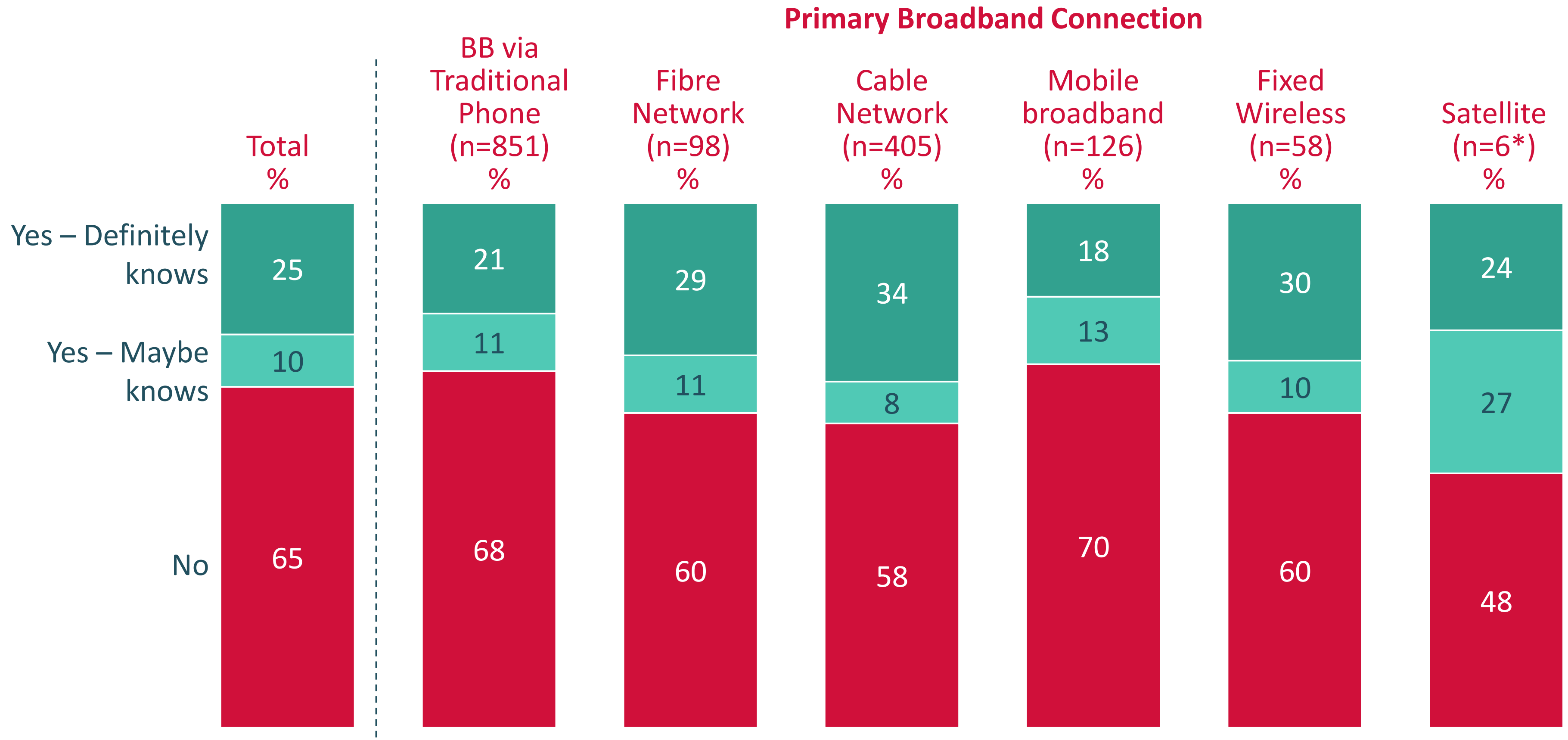
Mobile Phone access not asked this question

Knowledge of speed is highest for customers of UPC with 42% aware of claimed maximum download speed

Knowledge Of Claimed Maximum Download Speed

(Base: All Respondents who know primary broadband access, n=1552)

Q.25 Do you know the maximum claimed download speed for your main broadband service?



* - Small base

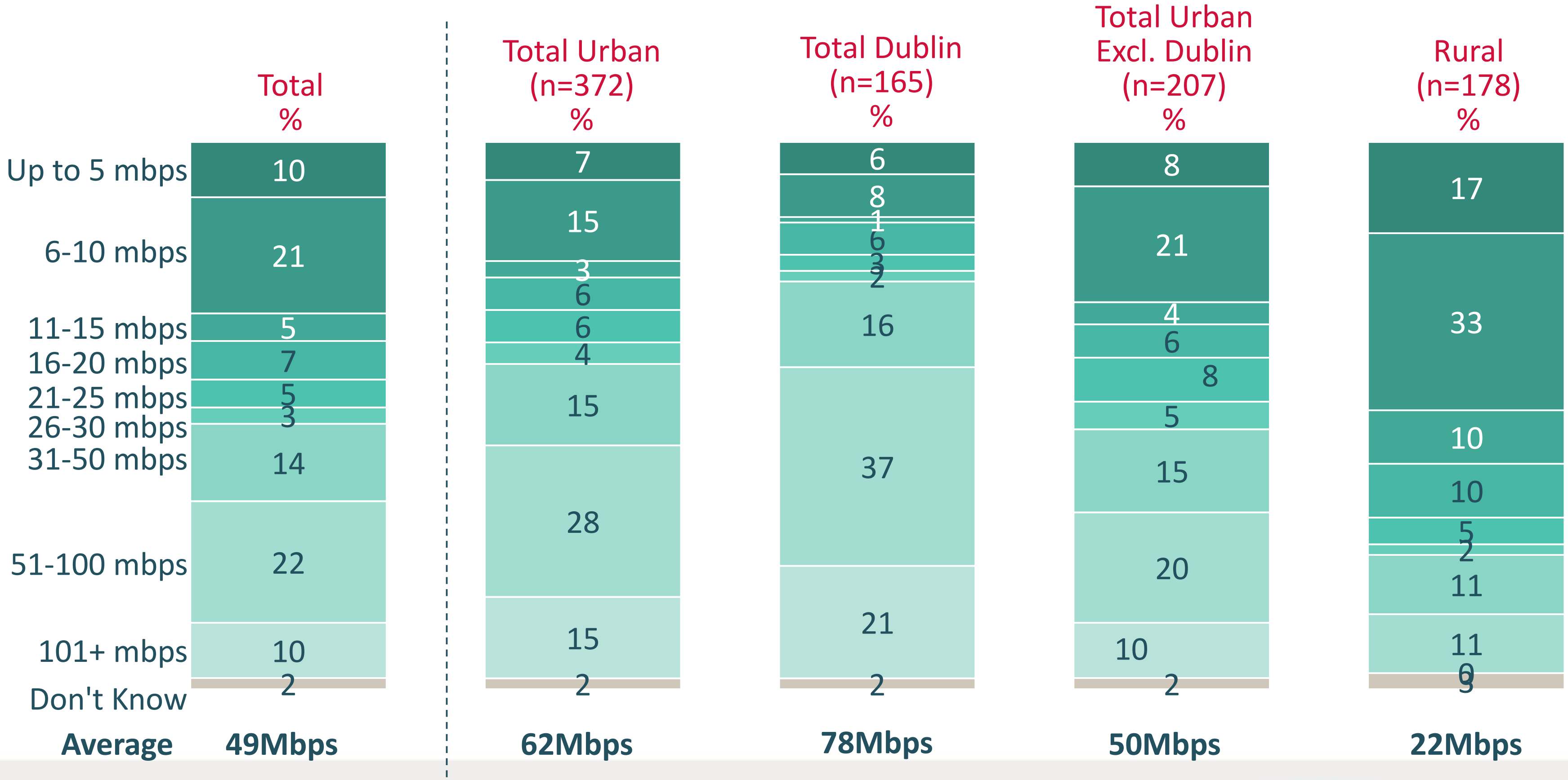
Mobile Phone access not asked this question

Claimed knowledge of speed is highest for those with a Cable network connection at 34%.

What is Maximum Claimed Up To Download Speed?

(Base: All Respondents who claim to Know Maximum Speed of broadband, n=550)

Q.26 What is the maximum claimed ‘up to’ download speed for your main broadband service??

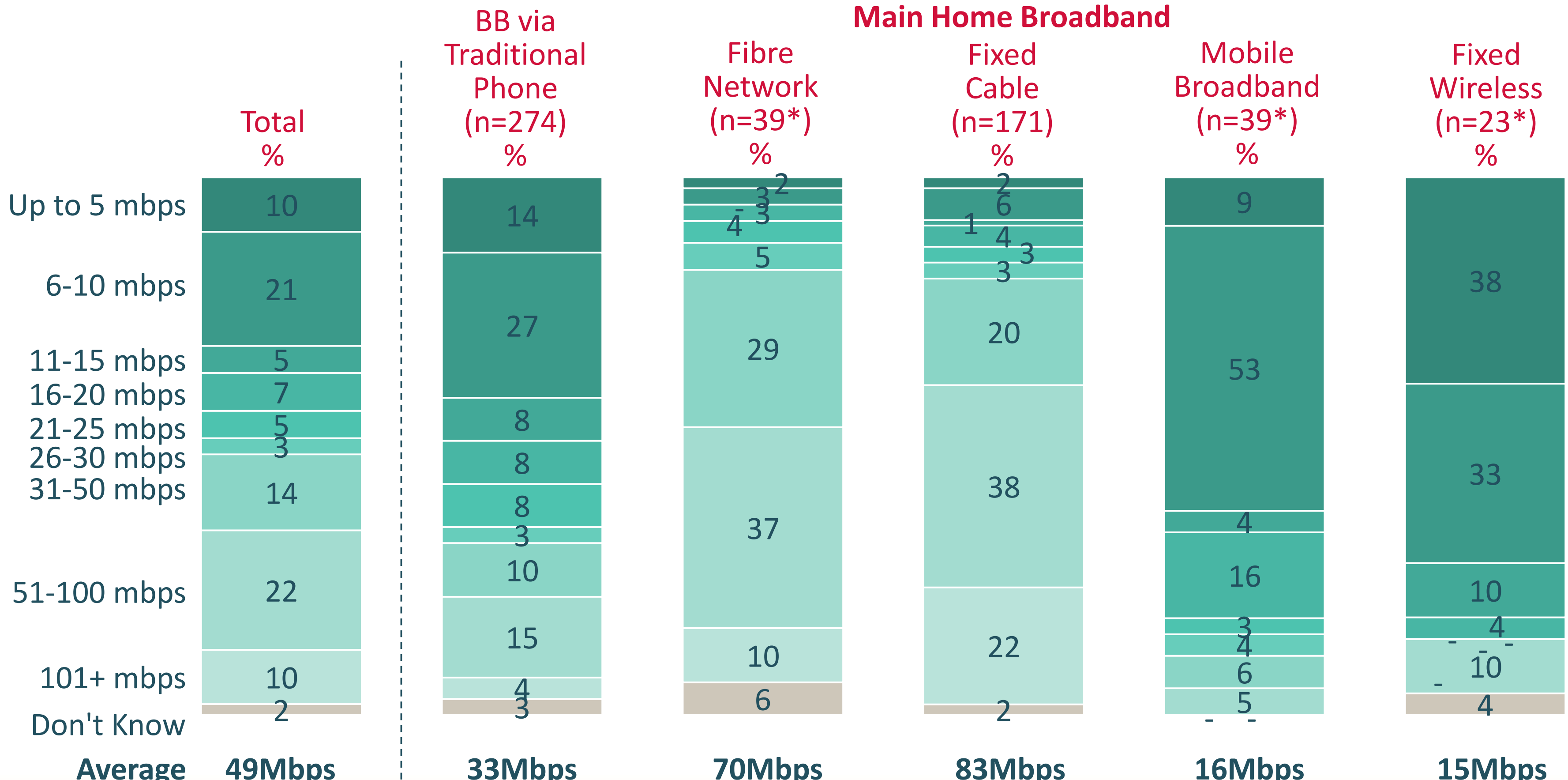


Average download speed of service is significantly higher in Dublin v Rest of Country at 78Mbps. Lowest speed achieved at average 22Mbps in rural Ireland.

What is Maximum Claimed Up To Download Speed x Access Type?

(Base: All Respondents Whose Main Home Broadband Access Is Not 3G/4G Mobile Phone Data And Who Know Maximum Speed, n=550)

Q.26 What is the maximum claimed 'up to' download speed for your main broadband service?



* - Small base

Base: Satellite n = 2 not included

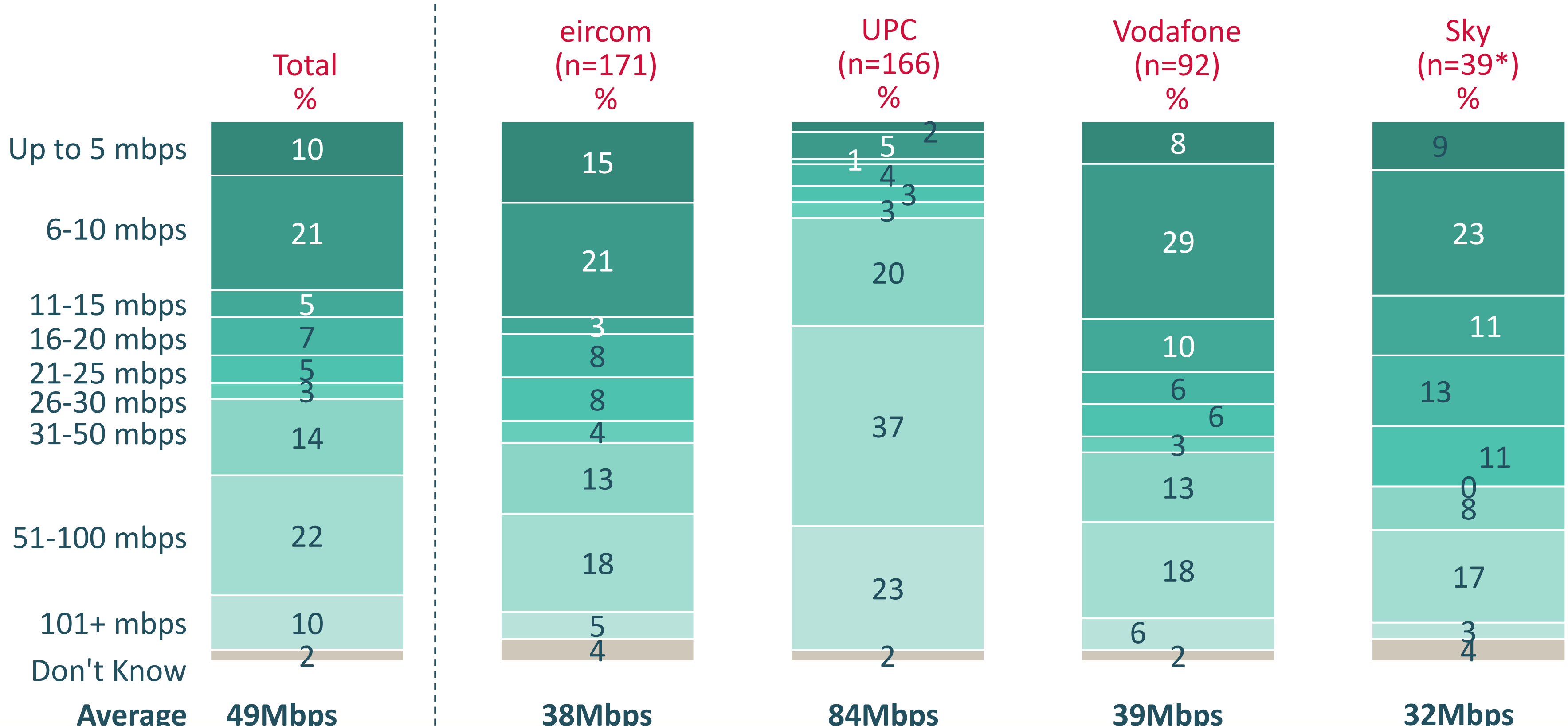
Average claimed download speed of service is higher for Fixed Cable at 83Mbps followed by Fibre Network at 70Mbps.

REDC

What is Maximum Claimed Up To Download Speed x Supplier?

(Base: All Respondents Whose Main Home Broadband Access Is Not 3G/4G Mobile Phone Data And Who Know Maximum Speed, n=550)

Q.26 What is the maximum claimed ‘up to’ download speed for your main broadband service?



* - Small base

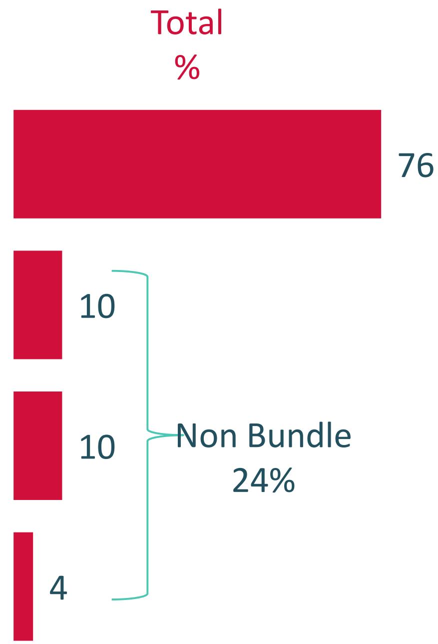
UPC achieves the highest average claimed download speed of 84Mbps with Eircom/Vodafone/Sky with the range of 39Mbps – 32Mbps.

Bundling

Bundle Incidence of Broadband Service

(Base: All Respondents Who have Broadband Access At Home, n=1583)

Q.27 Which of the following best describes how you are billed for your broadband/TV/Landline/mobile phone?



	Total Urban (n=1040) %	Total Dublin (n=472) %	Total Urban Ex Dublin (n=568) %	Rural (n=544) %
I receive a single bill that includes at least one of the other services I have	80	86	75	68
Separate bill with other services from different provider	6	4	9	16
I only have broadband	10	8	11	10
Separate bill with other services from same provider	3	2	5	5

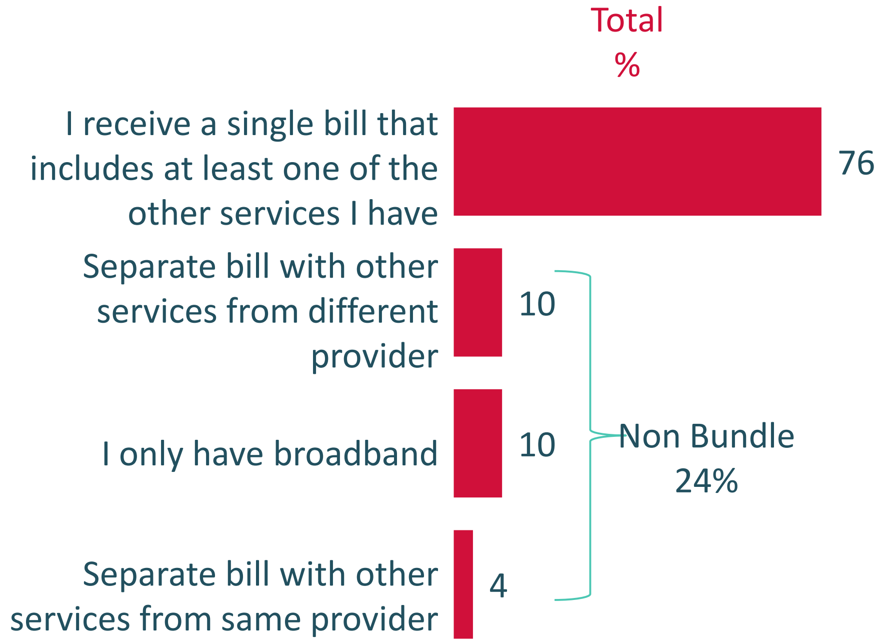
76% of those with broadband access pay for their broadband service as part of a bundle of other telecommunications services. Highest in Dublin at 86%.

REDC

Bundle Incidence of Broadband Service

(Base: All Respondents Who have Broadband Access At Home, n=1583)

Q.27 Which of the following best describes how you are billed for your broadband/TV/Landline/mobile phone?



	BB Trad Phone (n=851) %	Fibre Network (n=98) %	Cable Network (n=405) %	Mobile BB (n=126) %	Fixed Wireless (n=58) %	Mobile Phone (n=31*) %	Satellite (n=6*) %
I receive a single bill that includes at least one of the other services I have	84	78	91	15	26	24	-
Separate bill with other services from different provider	6	9	3	41	43	11	27
I only have broadband	6	6	5	34	22	58	73
Separate bill with other services from same provider	3	7	2	10	9	6	-

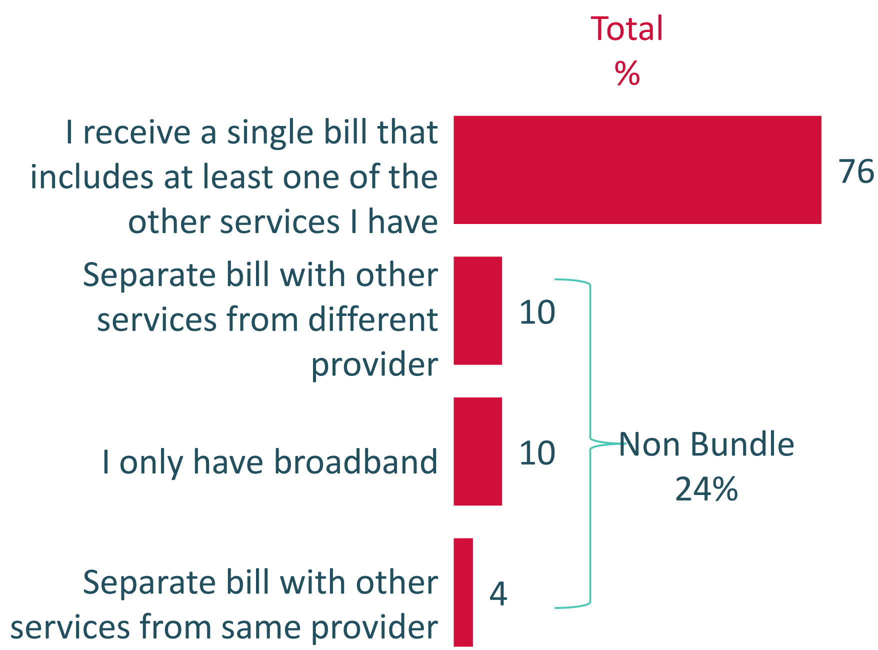
* Small Base

76% of those with broadband access pay for their broadband service as part of a bundle of other telecommunications services. Highest in Dublin at 86%.

Bundle Incidence of Broadband Service x Core Suppliers

(Base: All Respondents Who have Broadband Access At Home, n=1583)

Q.27 Which of the following best describes how you are billed for your broadband/TV/Landline/mobile phone?



	Eircom (n=512) %	UPC (n=397) %	Vodafone (n=257) %	Sky (n=123) %
I receive a single bill that includes at least one of the other services I have	90	91	74	93
Separate bill with other services from different provider	3	3	12	4
I only have broadband	4	4	8	2
Separate bill with other services from same provider	3	2	6	1

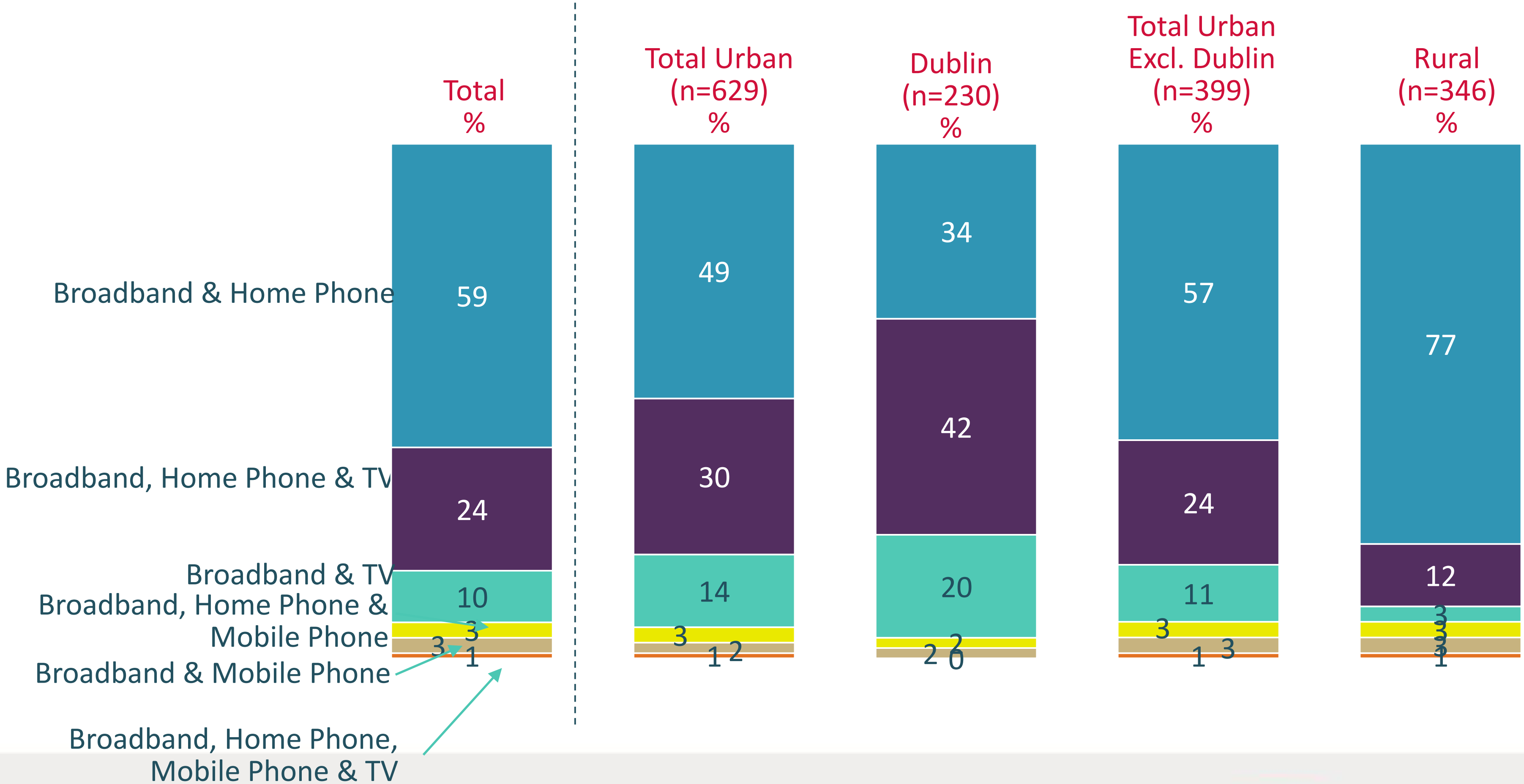
* Small Base

Bundling incidence is highest for Eircom, UPC and Sky Customers.

Bundle Type

(Base: All Decision Makers With Broadband Access In A Bundle n=966)

Q.29 Including your broadband services, which of the following services are also included on your single bill?



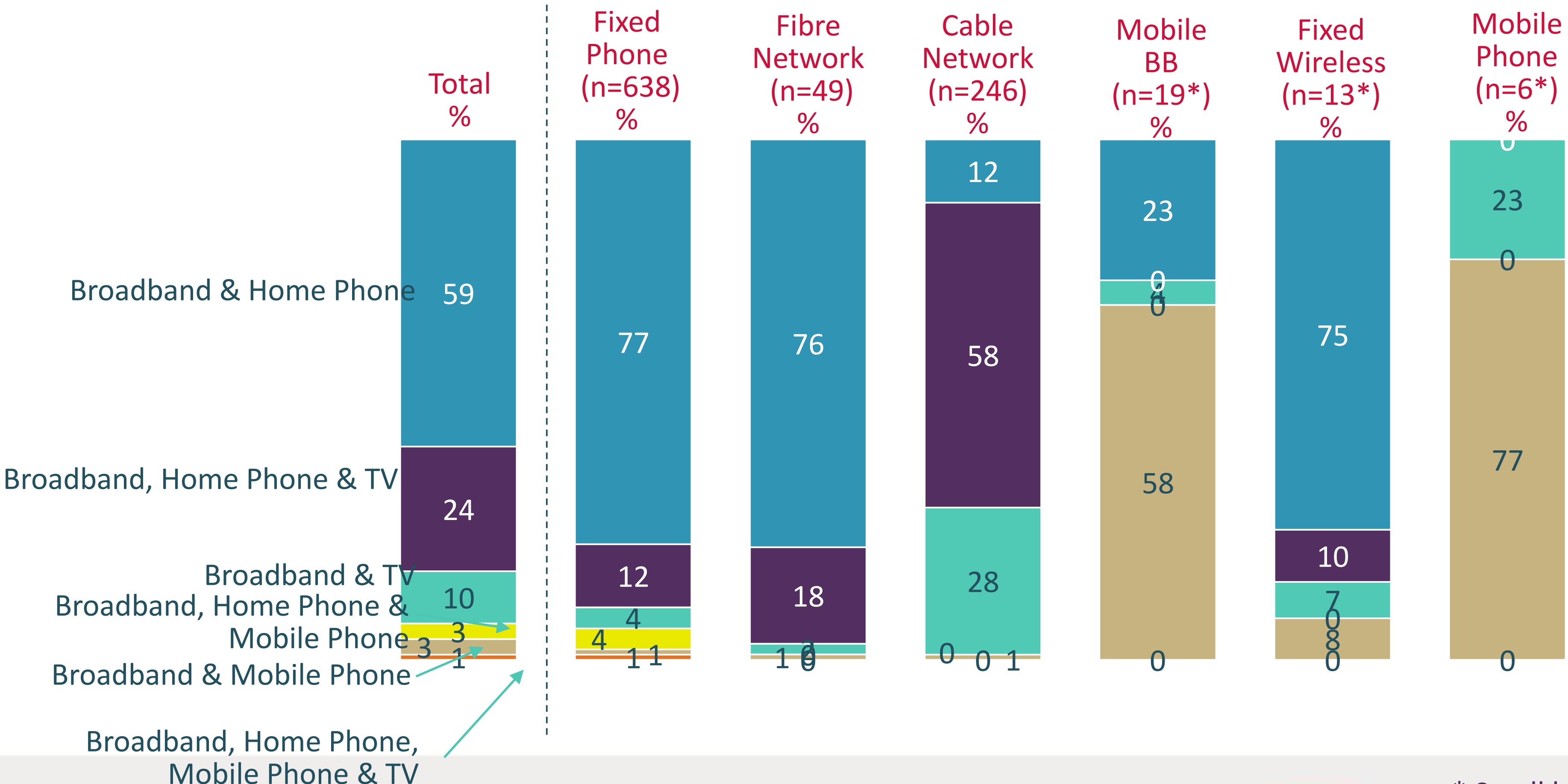
The most popular bundle type nationally is Broadband and Home Phone (59%) however within Dublin Broadband/Home Phone and TV is most popular at 42%.

REDC

Bundle Type

(Base: All Decision Makers With Broadband Access In A Bundle n=966)

Q.29 Including your broadband services, which of the following services are also included on your single bill?



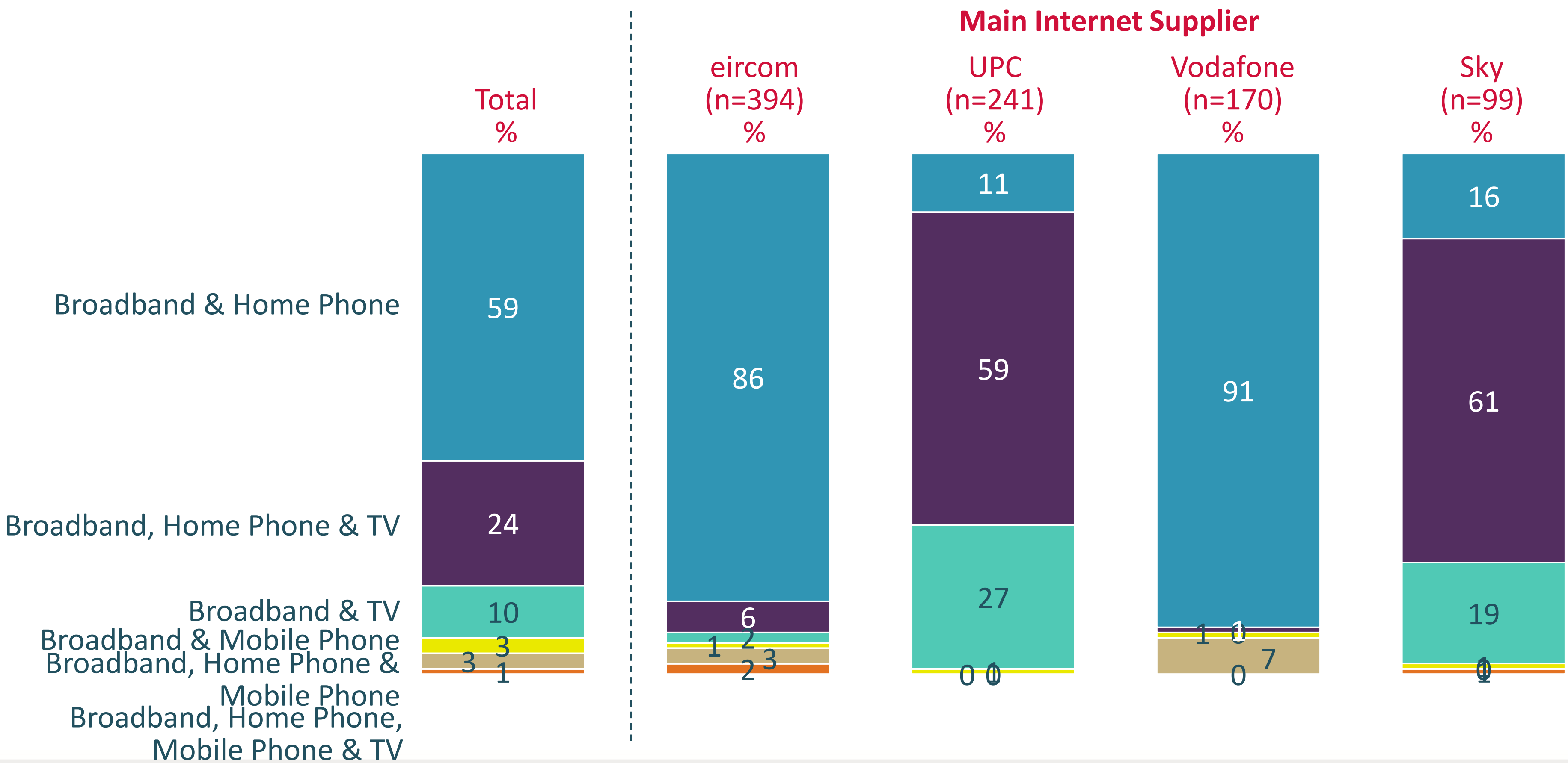
* Small base

The most popular bundle type nationally is Broadband and Home Phone (59%)

Bundle Type x Supplier

(Base: All With Broadband Access In A Bundle, n=966)

Q.29 Including your broadband services, which of the following services are also included on your single bill?

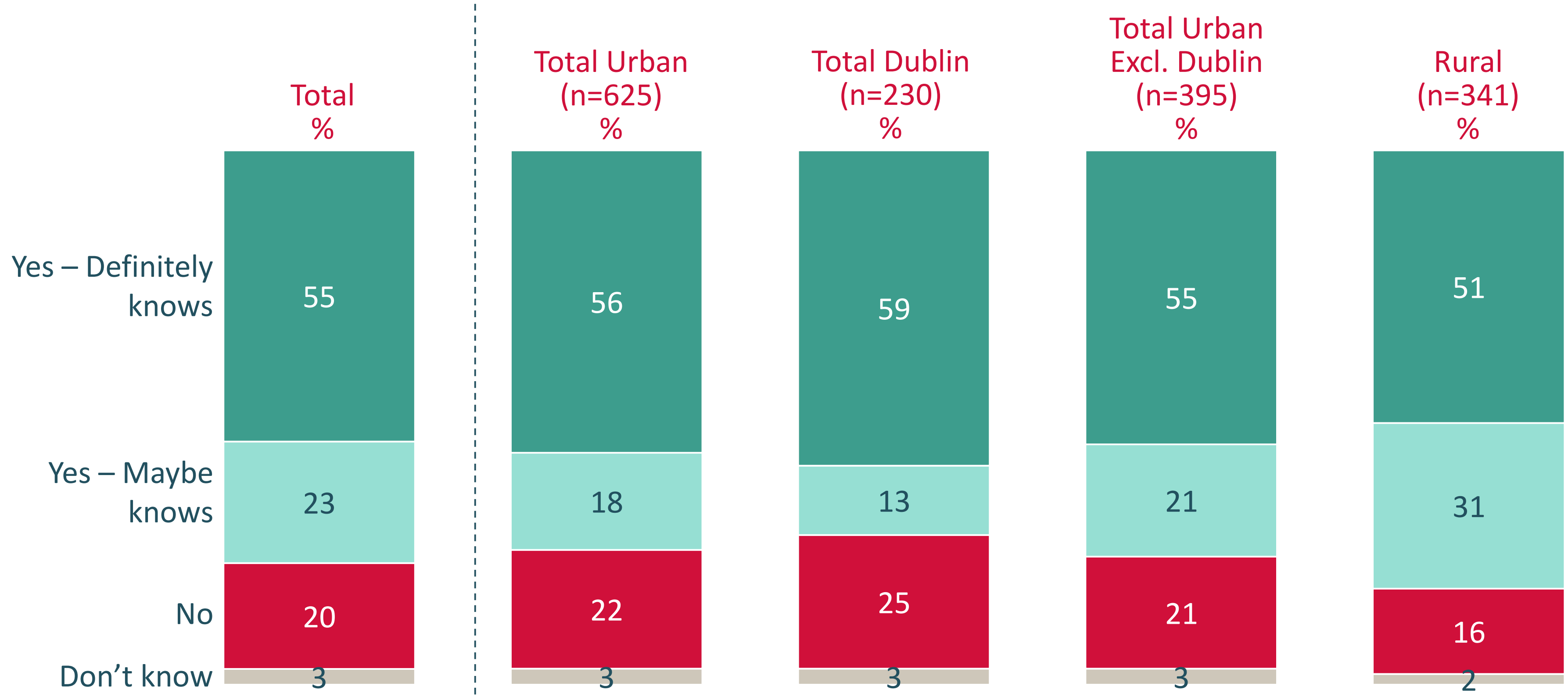


Bundles in Eircom and Vodafone most likely Broadband and Home Phone (86% and 91% respectively) while UPC/Sky Bundle most likely BB, Home Phone & TV (59%/61% respectively).

Knowledge of Broadband Bundle Cost

(Base: All With Broadband Access who know the bundle type they have, n=966)

Q.31 Do you know how much you pay for your bundled service on a monthly basis?

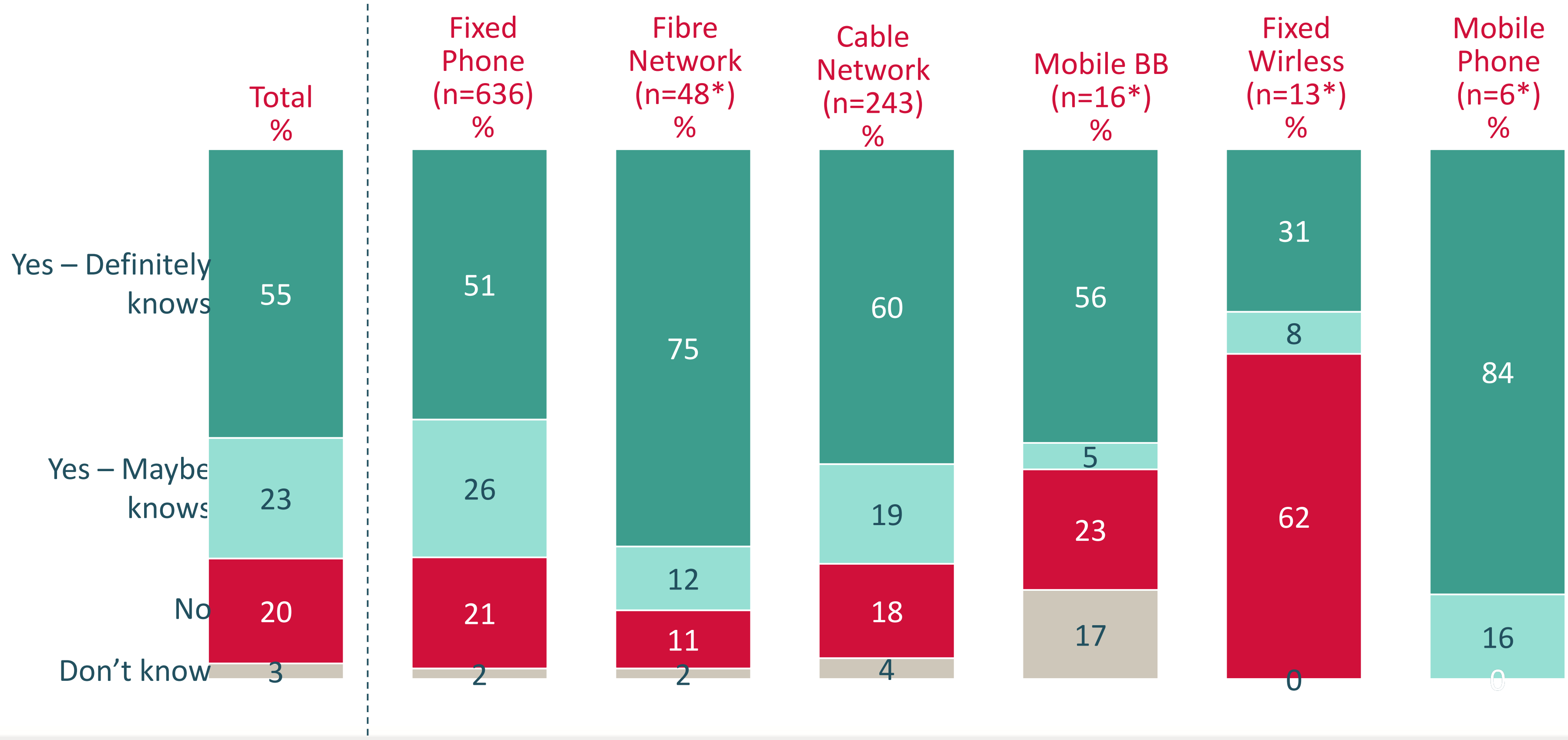


55% of the national population who have a broadband bundle claim they definitely know the cost of their bundle

Knowledge of Broadband Bundle Cost

(Base: All With Broadband Access who know the bundle type they have, n=966)

Q.31 Do you know how much you pay for your bundled service on a monthly basis?



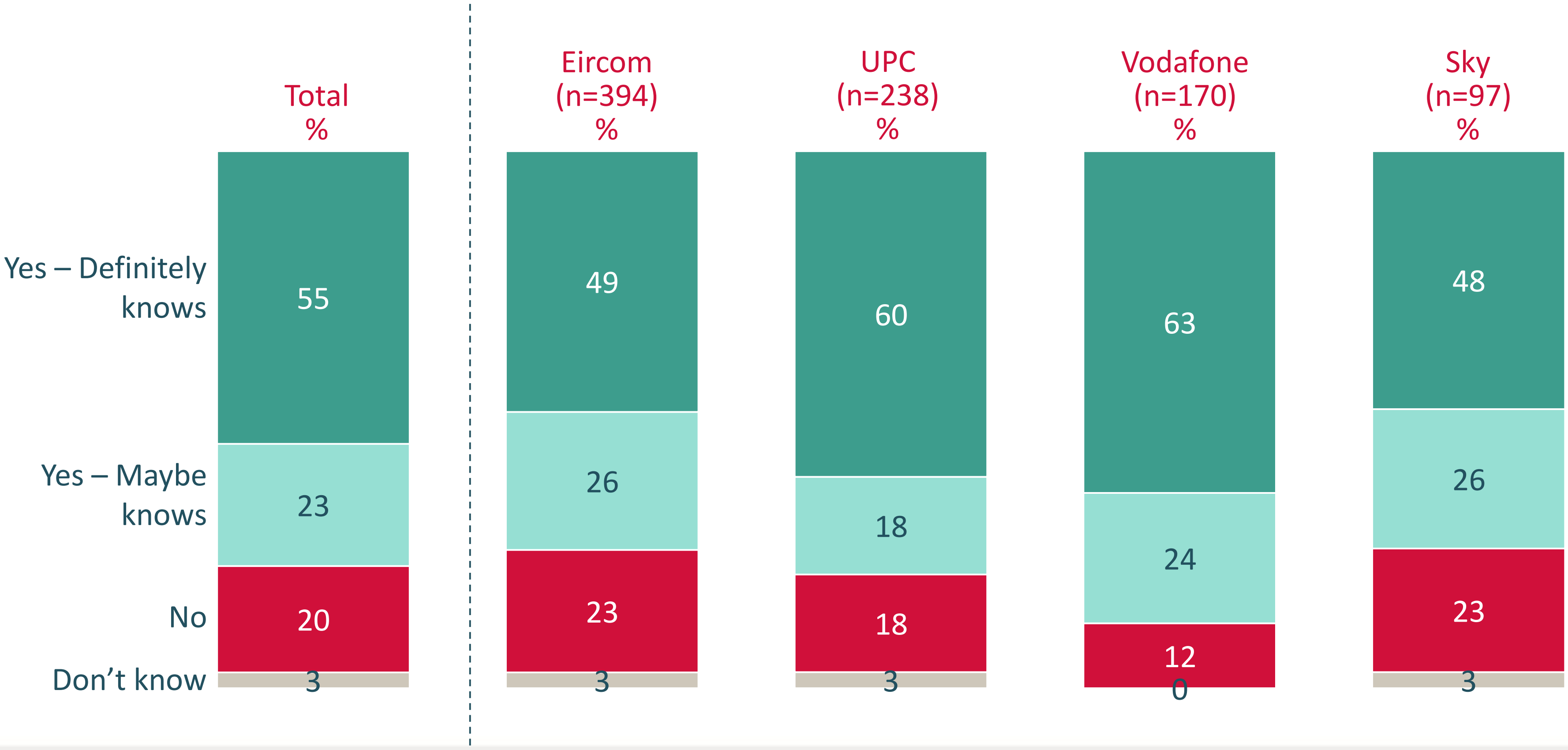
* Small base

55% of the national population who have a broadband bundle claim they definitely know the cost of their bundle highest for Fibre connected homes

Knowledge of Broadband Bundle Cost

(Base: All With Broadband Access who know the bundle type they have, n=966)

Q.31 Do you know how much you pay for your bundled service on a monthly basis?

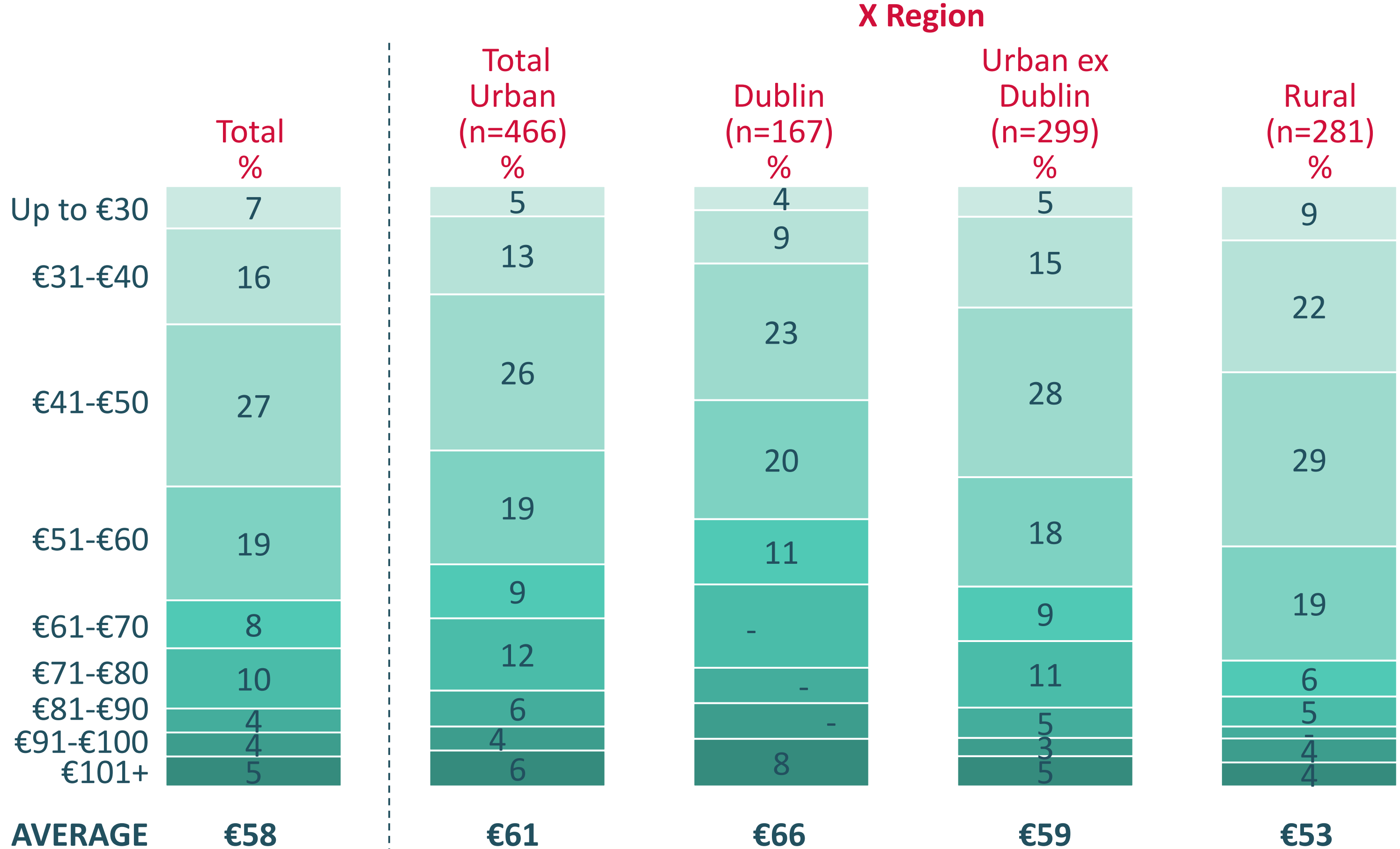


55% of the national population who have a broadband bundle claim they definitely know the cost of their bundle. Highest for UPC and Vodafone customers.

Typical Broadband Bundle Spend Per Month x Region

(Base: All Decision Makers With Broadband Access In A Specified Bundle And Know How Much It Costs n=747)

Q.32 How much do you and your household typically pay for this bundle service per month (excluding any promotional/introductory offers)?

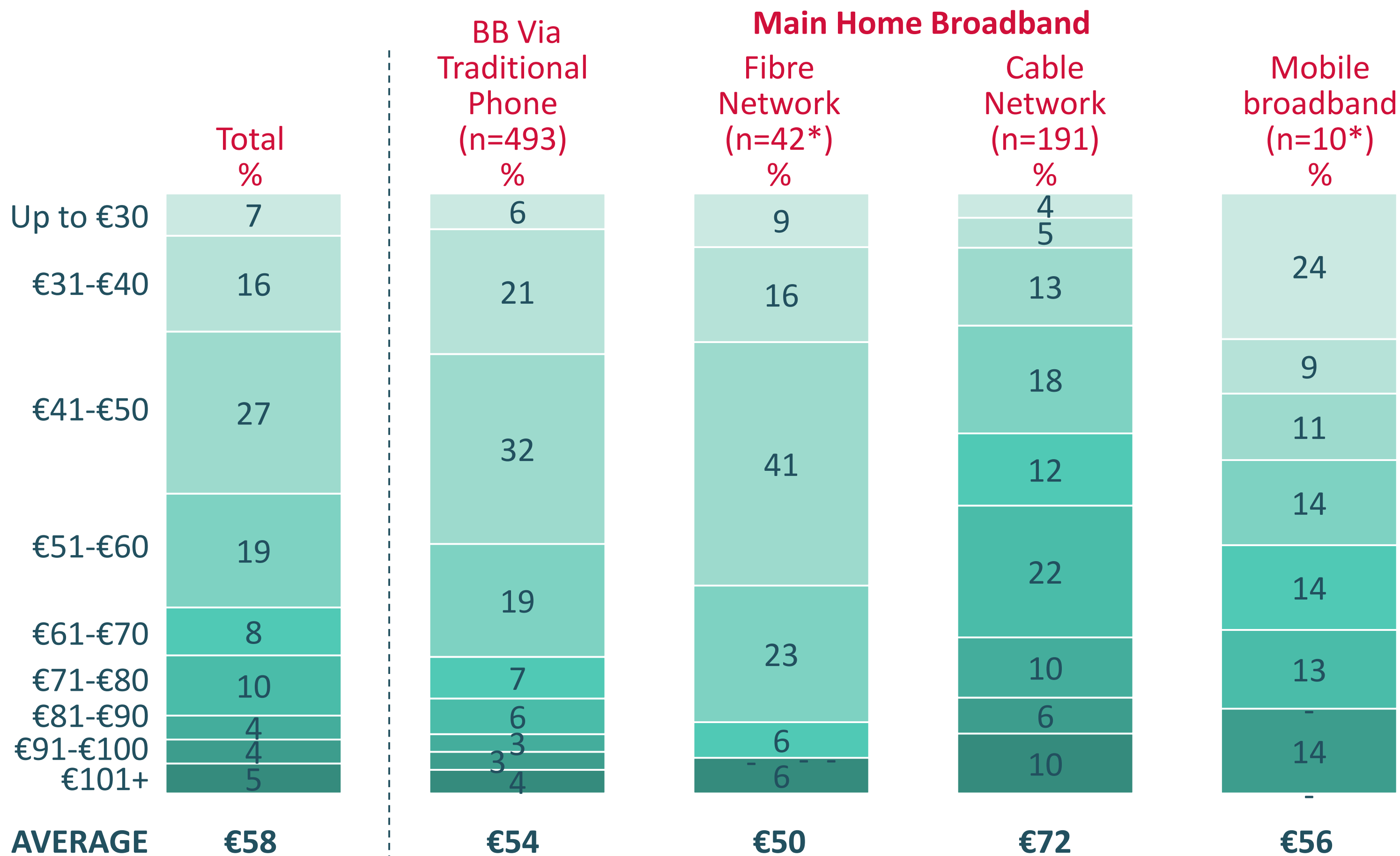


Average national spend is €58. Average spend is higher in Dublin at €66

Typical Broadband Bundle Spend Per Month - Platform

(Base: All Decision Makers With Broadband Access In A Specified Bundle And Know How Much It Costs n=747)

Q.32 How much do you and your household typically pay for this bundle service per month (excluding any promotional/introductory offers)?



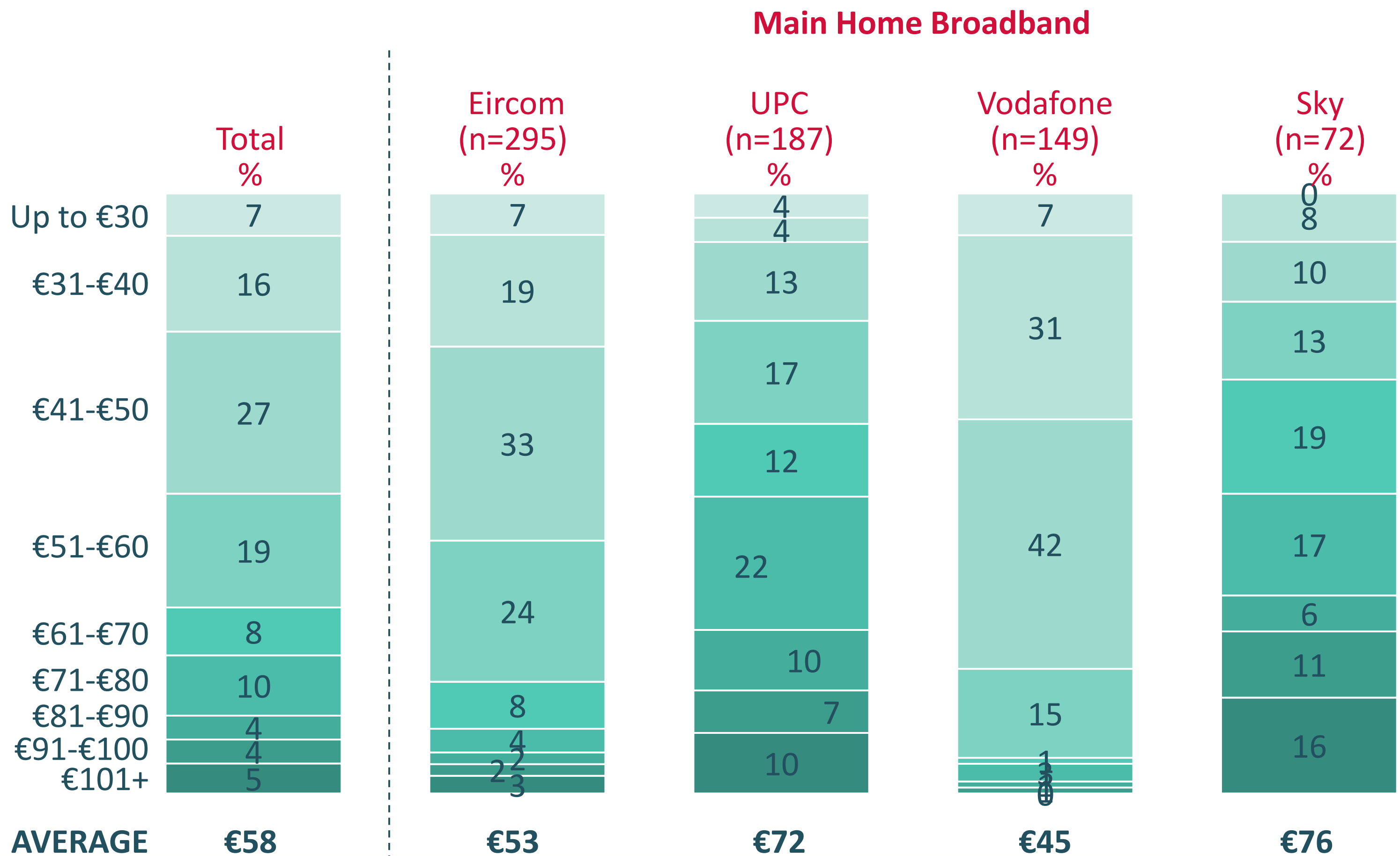
Small Base – n=6 Mobile Phone, n=0 Satellite, n=7 Fixed Wireless

Average national spend is €58. Average spend is higher for those connecting on a Cable network at €72 per month.

Typical Broadband Bundle Spend Per Month - Supplier

(Base: All Decision Makers With Broadband Access In A Specified Bundle And Know How Much It Costs n=747)

Q.32 How much do you and your household typically pay for this bundle service per month (excluding any promotional/introductory offers)?



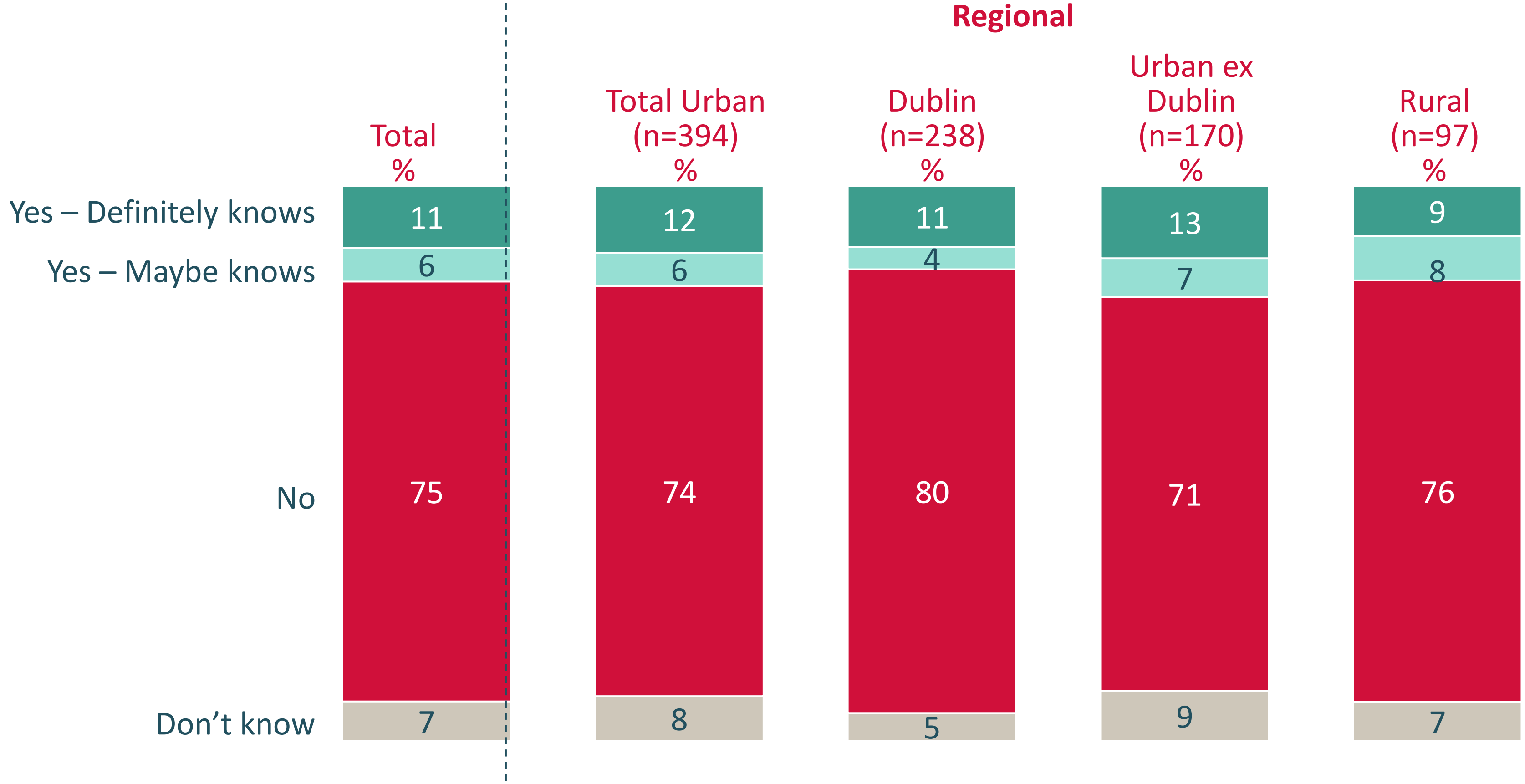
Average national spend is €58. Average spend is higher for UPC and Sky Customers.

REDC

Does Monthly Amount Include Additional Charges?

(Base: All With Broadband Access In A Specified Bundle Excluding Where Employer Pays, n=966)

Q.34 Does the monthly amount you pay for your bundled services include any additional charges (e.g. usage charges, out of package calls charges etc.)?

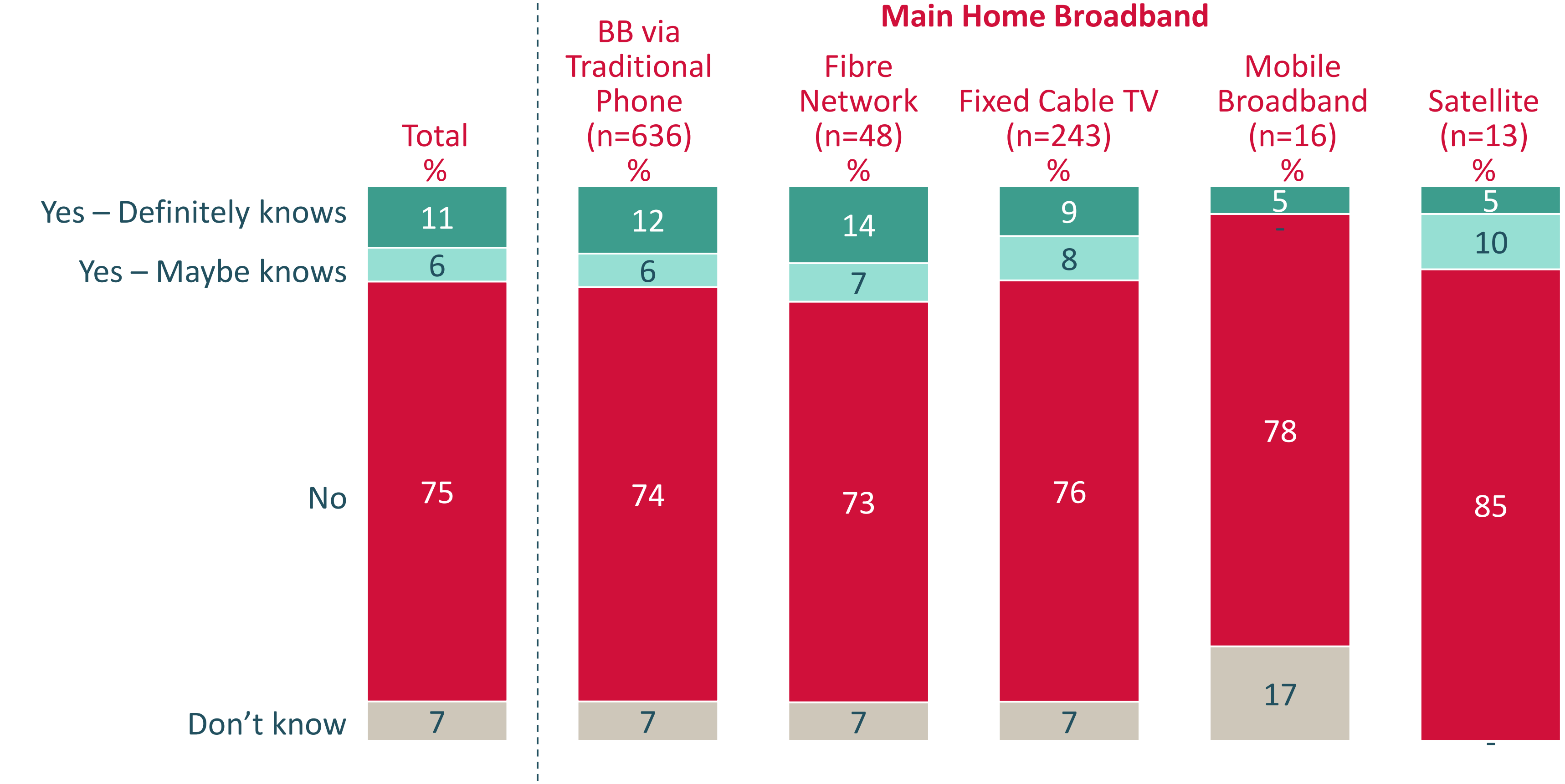


17% are any likely to claim there is an additional monthly amount on top of monthly broadband bundle subscription. No significant difference by region

Does Monthly Amount Include Additional Charges?

(Base: All With Broadband Access In A Specified Bundle Excluding Where Employer Pays, n=966)

Q.34 Does the monthly amount you pay for your bundled services include any additional charges (e.g. usage charges, out of package calls charges etc.)?



Small Base – n=6 Mobile Phone, n=0 Satellite,

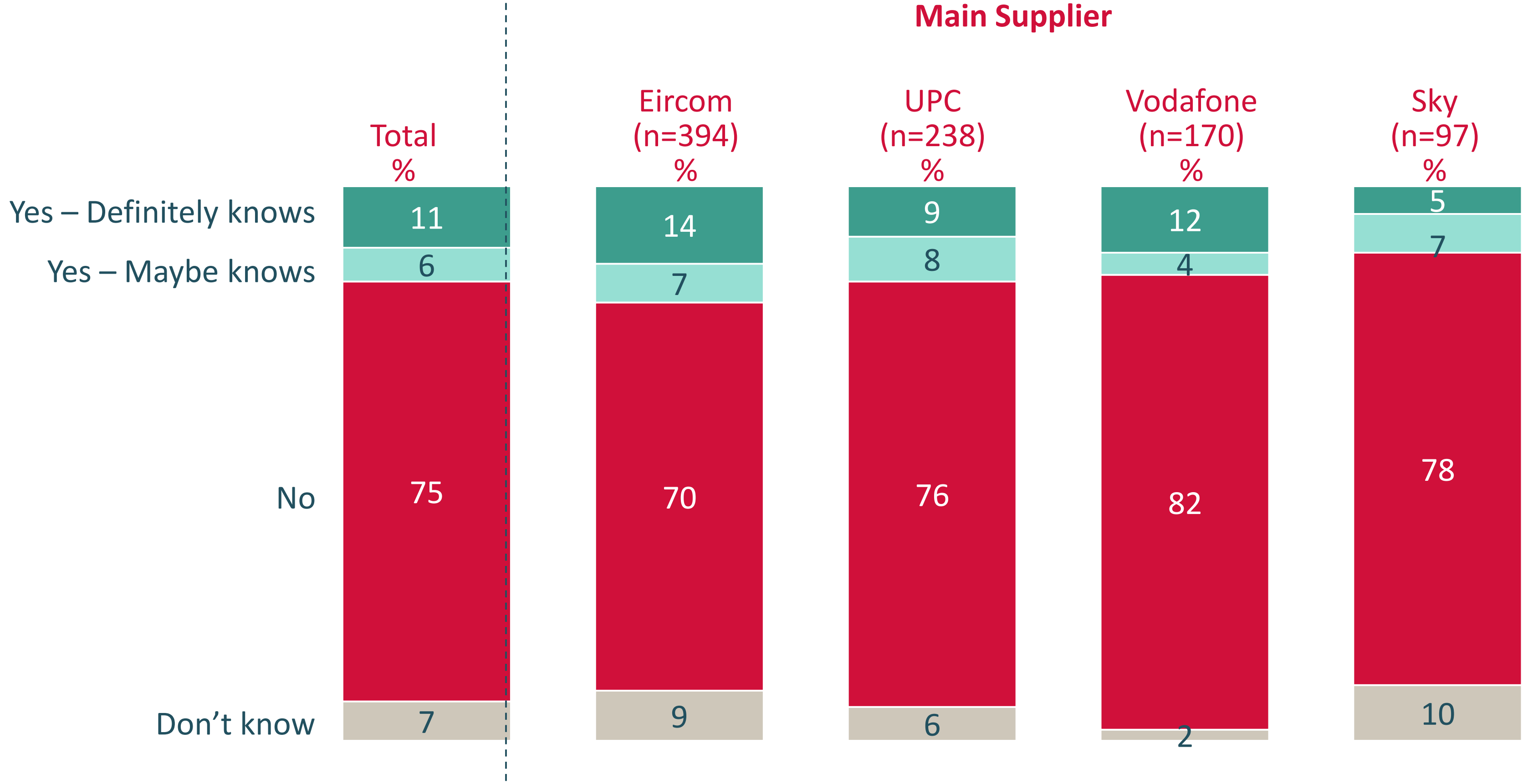
17% are any likely to claim there is an additional monthly amount on top of monthly broadband bundle subscription. Slightly higher for Fibre households.

REDC

Does Monthly Amount Include Additional Charges?

(Base: All With Broadband Access In A Specified Bundle Excluding Where Employer Pays, n=966)

Q.34 Does the monthly amount you pay for your bundled services include any additional charges (e.g. usage charges, out of package calls charges etc.)?

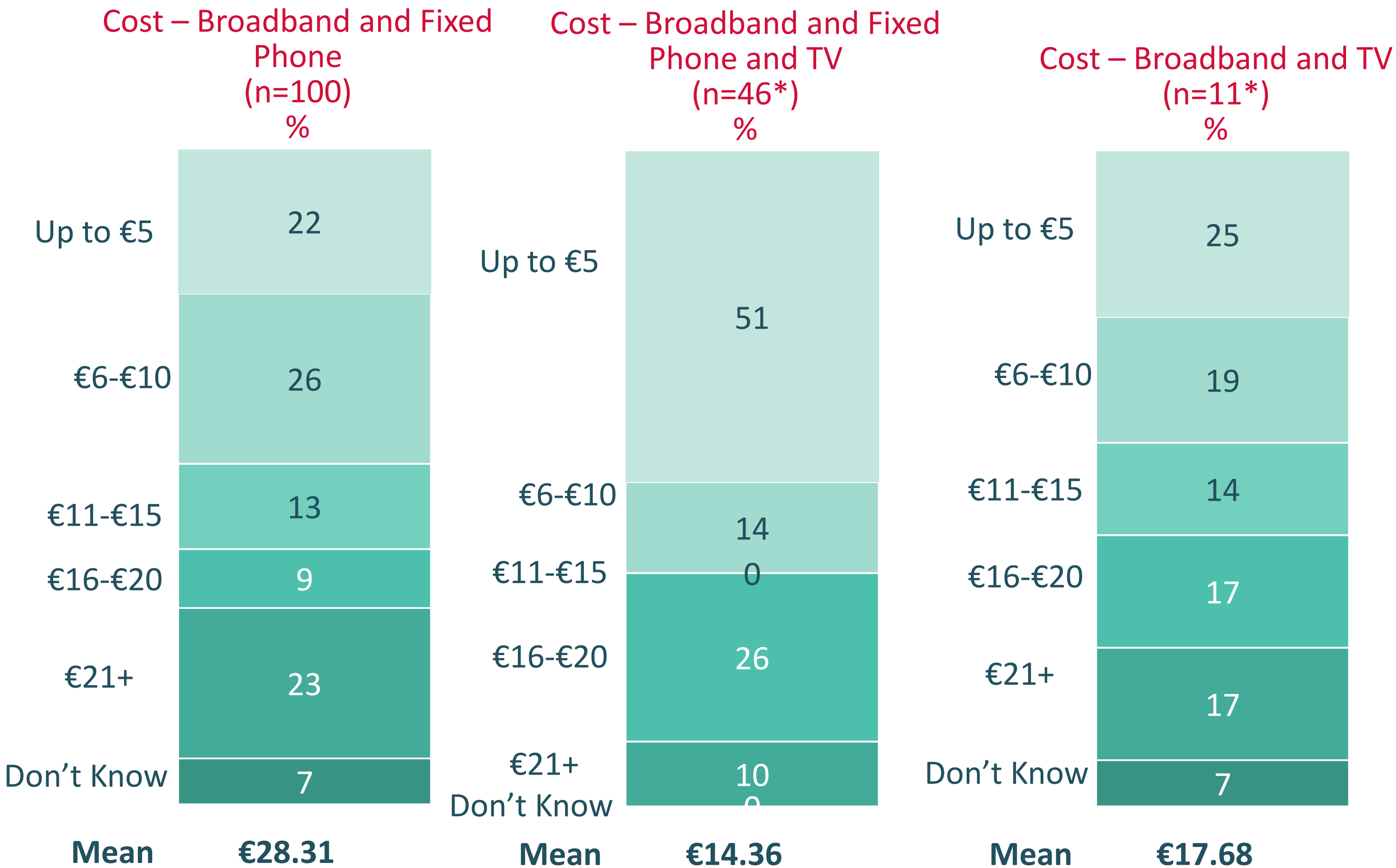


17% are any likely to claim there is an additional monthly amount on top of monthly broadband bundle subscription. No significant difference by Operator

Typical Spend Per Month (Additional Charges)-Bundle Holders

(Base: All Bundle owner of each type who are aware of additional charges)

Q.35 Can you estimate the cost of these additional charges?



* Small base

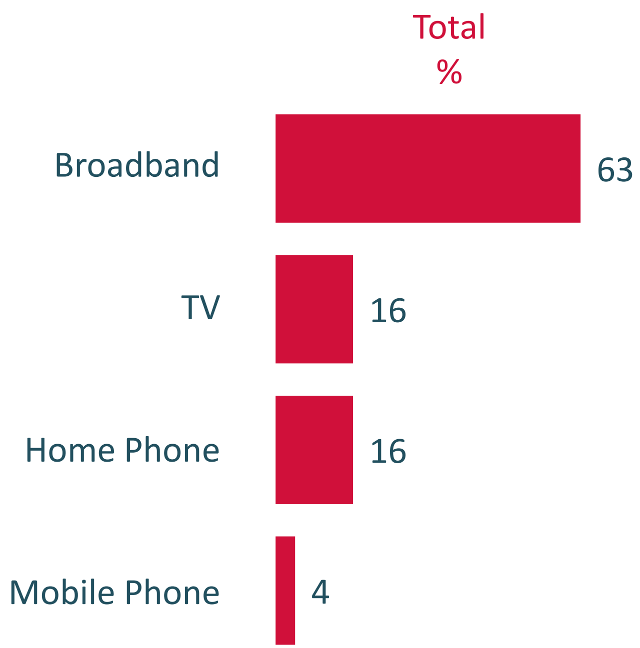
Average additional charge by the most popular bundle held (Broadband and Fixed Phone) is €28.31 per month

REDC

Most Important Aspect of Service within Broadband Bundles

(Base: All With Broadband Access In A Specified Bundle Excluding Where Employer Pays, n=966)

Q.36 Which service in the bundle/package you subscribe to is most important to you and your household?



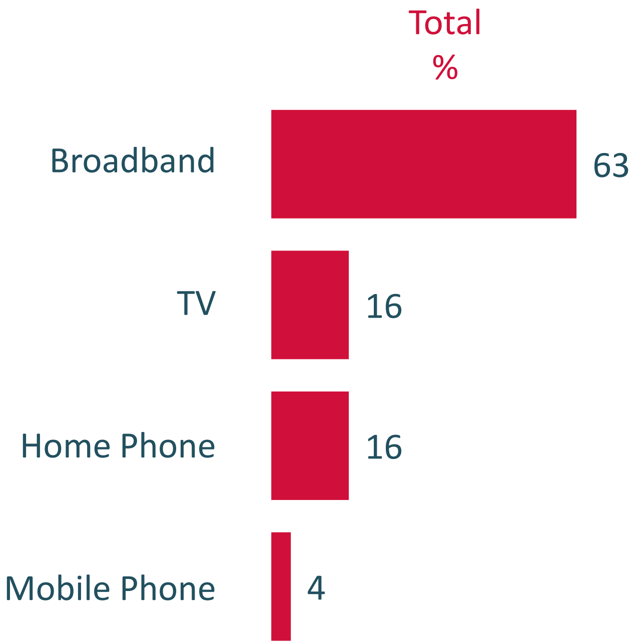
	Total Urban (n=625) %	Total Dublin (n=230) %	Total Urban Excl. Dublin (n=395) %	Rural (n=341) %
Broadband	61	61	61	68
TV	20	22	20	9
Home Phone	15	15	16	18
Mobile Phone	3	2	4	4

63% claim that broadband is the most important aspect of a bundle.

Most Important Aspect of Service x Supplier

(Base: All With Broadband Access In A Specified Bundle Excluding Where Employer Pays, n=966)

Q.36 Which service in the bundle/package you subscribe to is most important to you and your household?



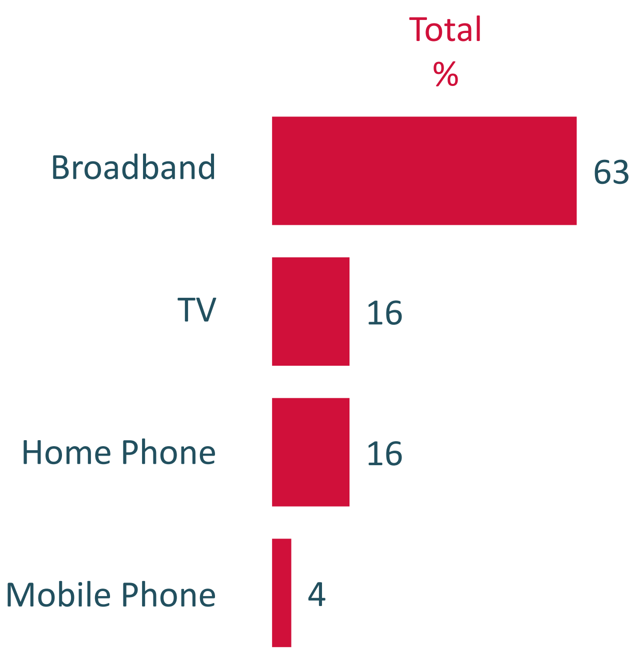
	Eircom (n=394) %	UPC (n=238) %	Vodafone (n=170) %	Sky (n=97) %
Broadband	68	54	82	47
TV	4	37	1	46
Home Phone	26	8	12	5
Mobile Phone	1	0	6	1

63% claim that broadband is the most important aspect of a bundle. Highest for Vodafone customers at 82%.

Most Important Aspect of Service within Broadband Bundles

(Base: All With Broadband Access In A Specified Bundle Excluding Where Employer Pays, n=966)

Q.36 Which service in the bundle/package you subscribe to is most important to you and your household?



Existing Bundle Type

BB+Home Phone (n=573) %	BB+Home Ph + TV (n=233) %	BB+TV (n=99) %	BB + Mobile Phone (n=27*) %	BB, Home, Mobile Ph (26*) %
75	42	64	29	42
n/a	51	36	n/a	n/a
25	7	n/a	71	4
n/a	n/a	n/a	n/a	54

n/a – not applicable
* = small base

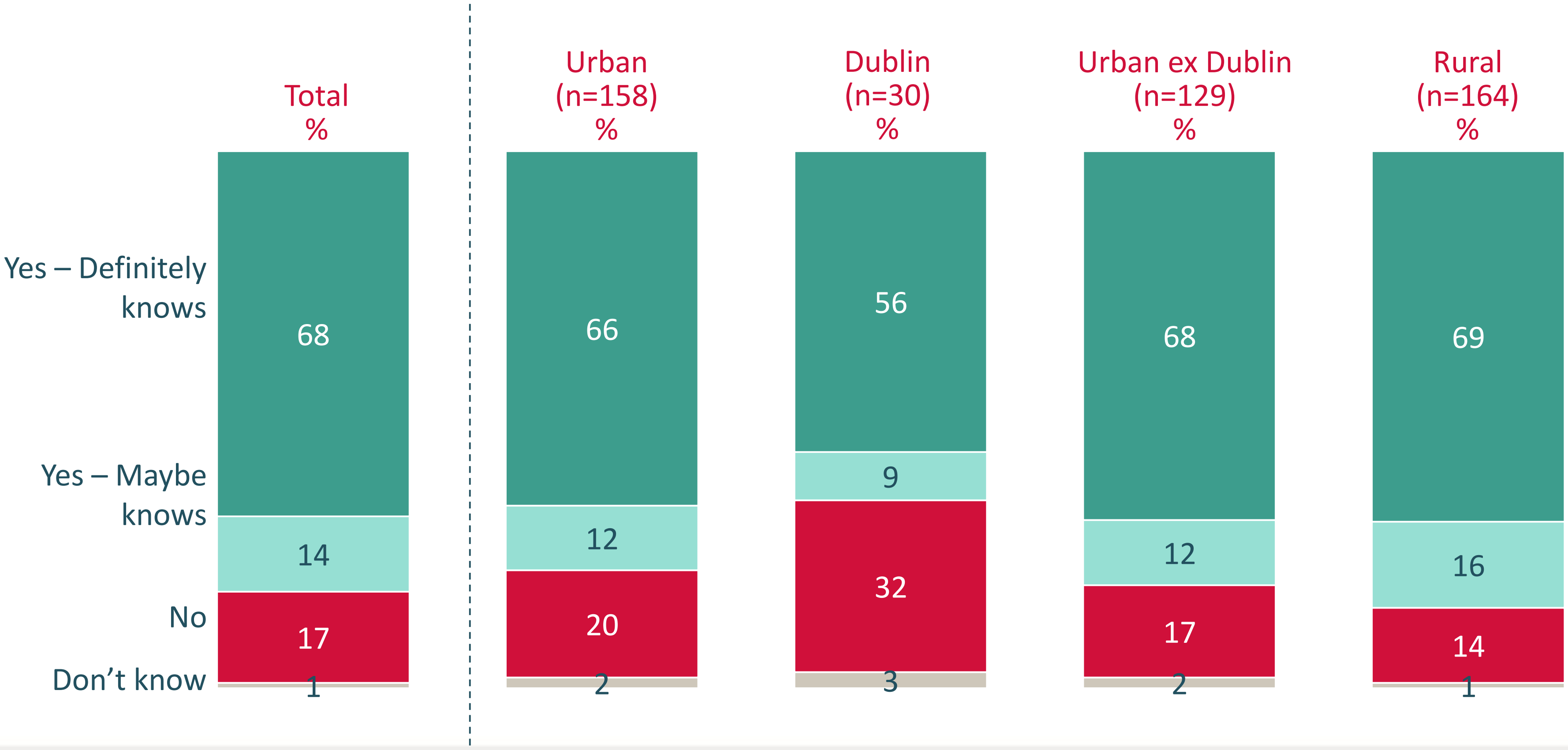
63% claim that broadband is the most important aspect of a bundle, ratings vary by bundle type held

Non -Bundles

Knowledge of Broadband Cost (Non Bundle)

(Base: All With Broadband Access who know the bundle type they have, n=322)

Q.41 Do you know how much you and your household pay for your broadband service on a monthly basis?

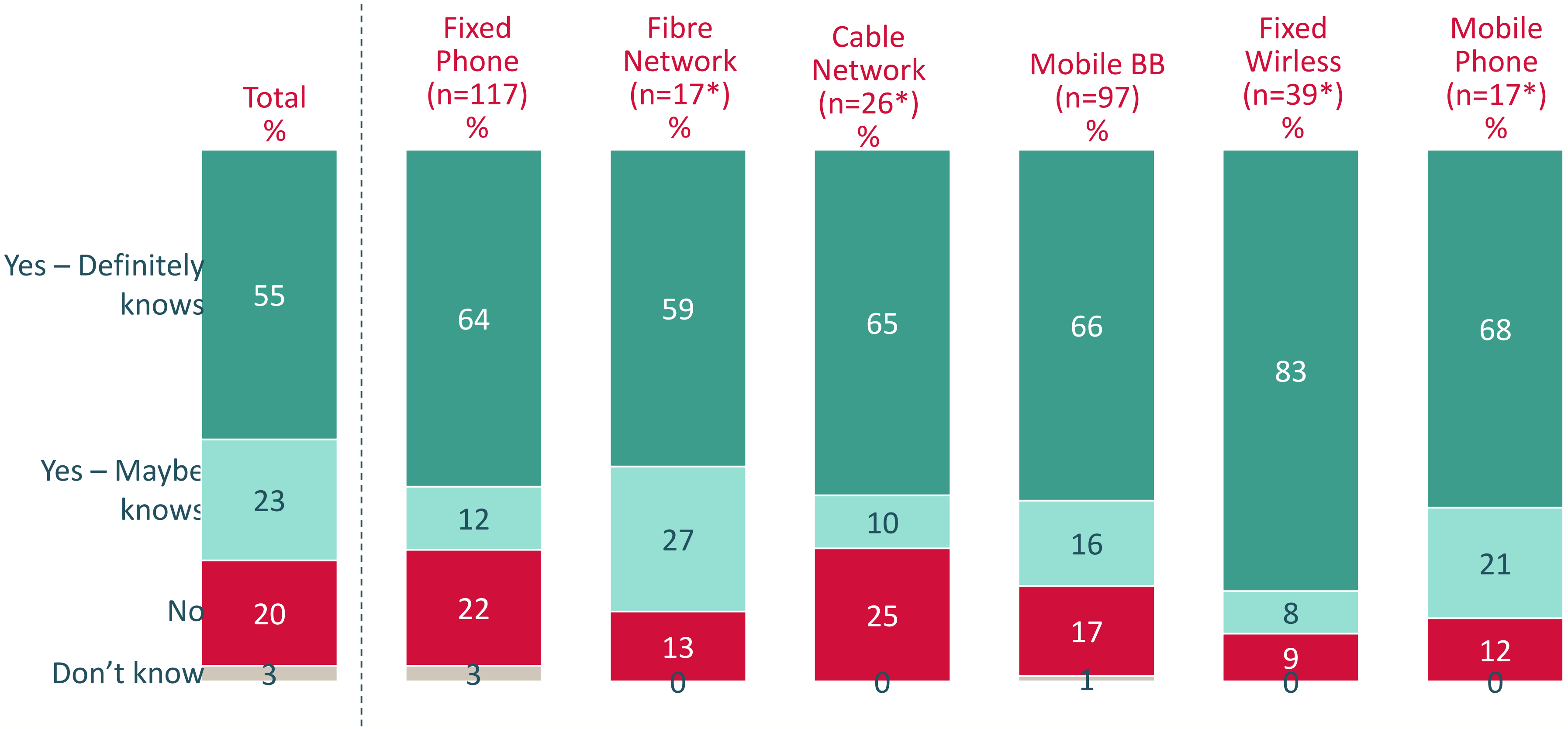


82% of the non bundle household's claim to know the cost of their broadband monthly subscription

Knowledge of Broadband Bundle Cost

(Base: All With Broadband Access who know the bundle type they have, n=322)

Q.31 Do you know how much you pay for your bundled service on a monthly basis?



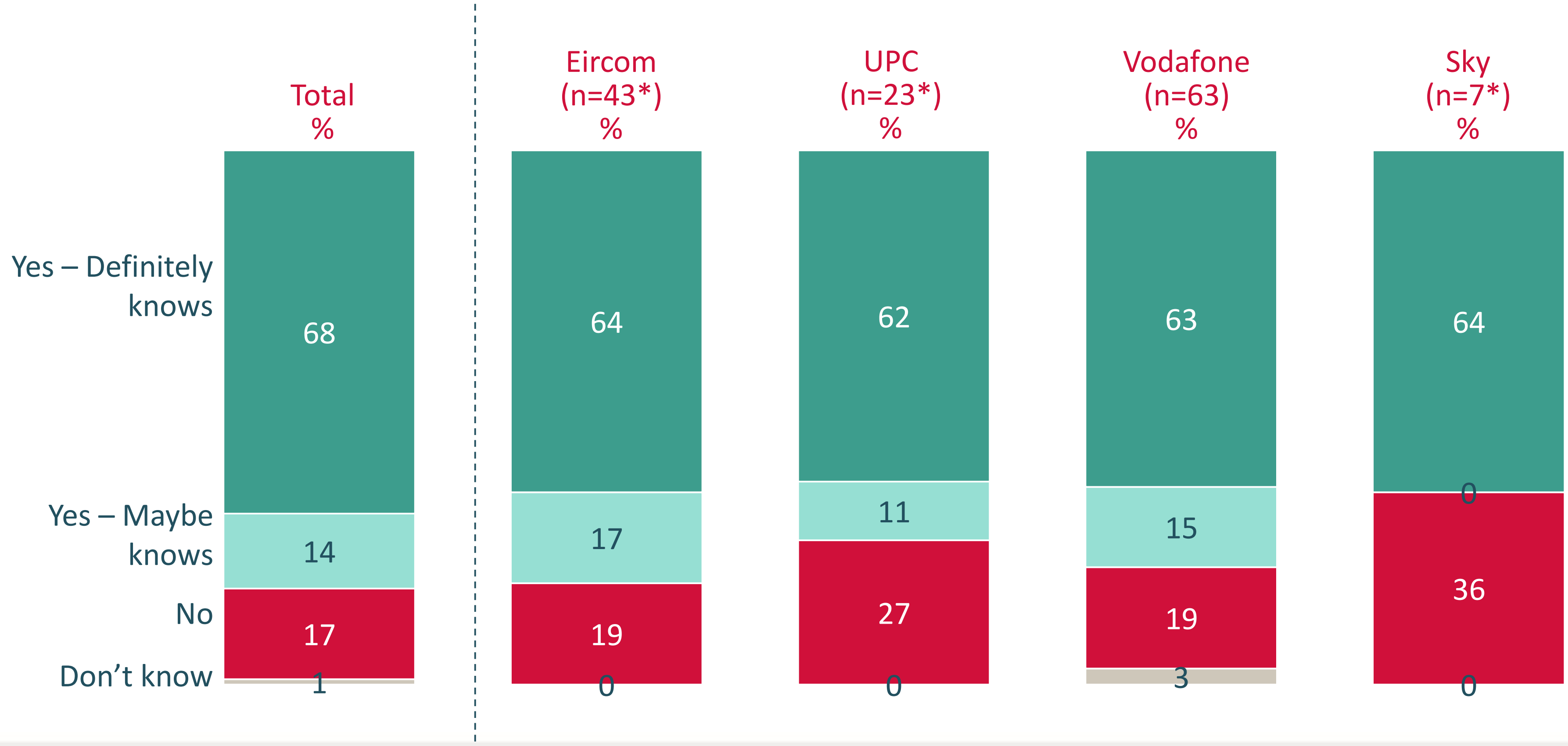
* Small base. Satellite not shown n =4

55% of the national population who have a broadband bundle claim they definitely know the cost of their bundle

Knowledge of Broadband Cost (Non Bundle) x Supplier

(Base: All With Broadband Access who know the bundle type they have, n=322)

Q.41 Do you know how much you and your household pay for your broadband service on a monthly basis?



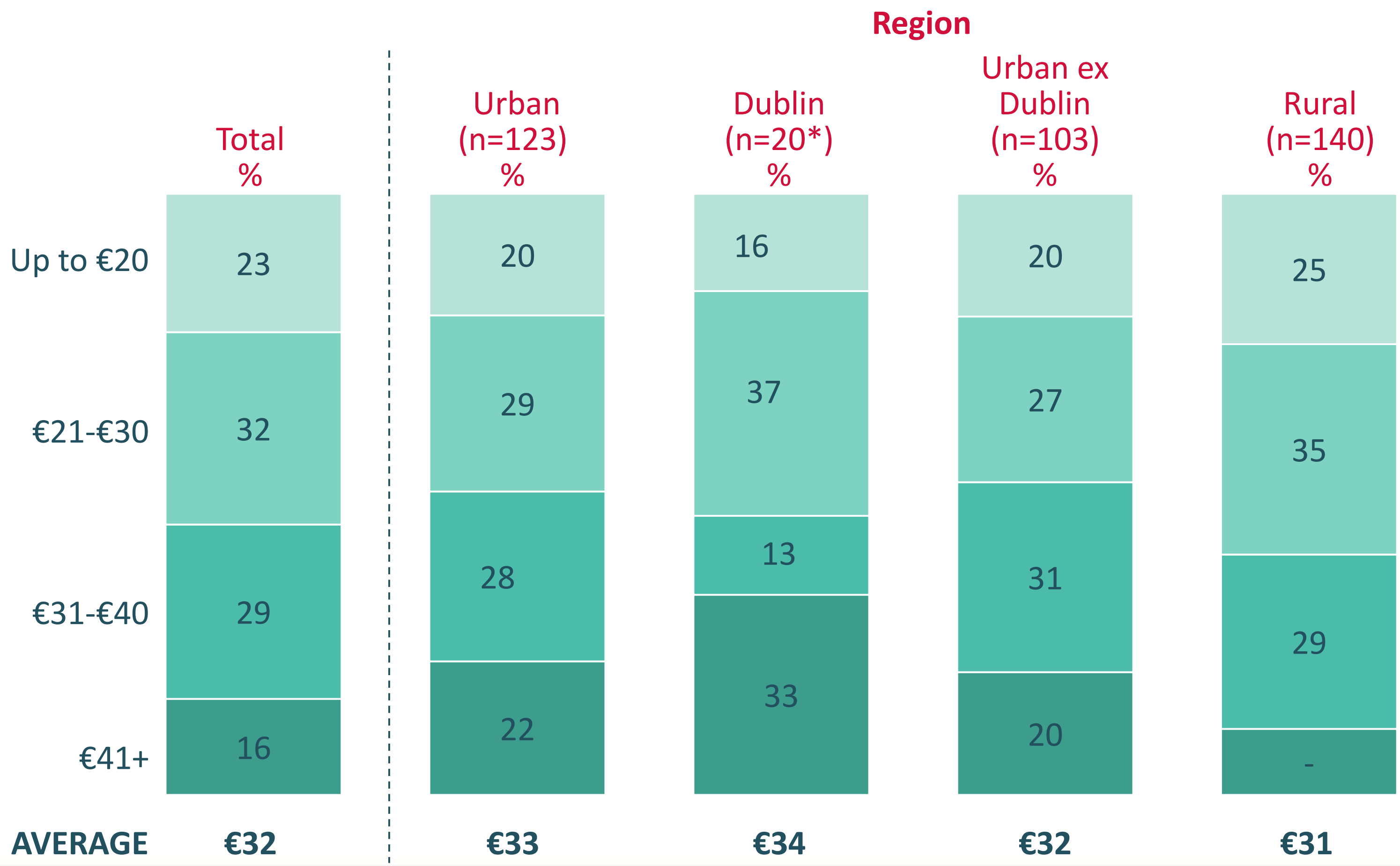
* Small Base – Dublin

The level of stated 'Definitely Know' cost of broadband service is very similar by supplier

Typical Broadband Spend Per Month – (Non Bundle)

(Base: All Decision Makers With Broadband Access Non Bundle And Know How Much It Costs n=262)

Q.42How much do you and your household typically pay for broadband per month (excluding any promotional/introductory offers)?



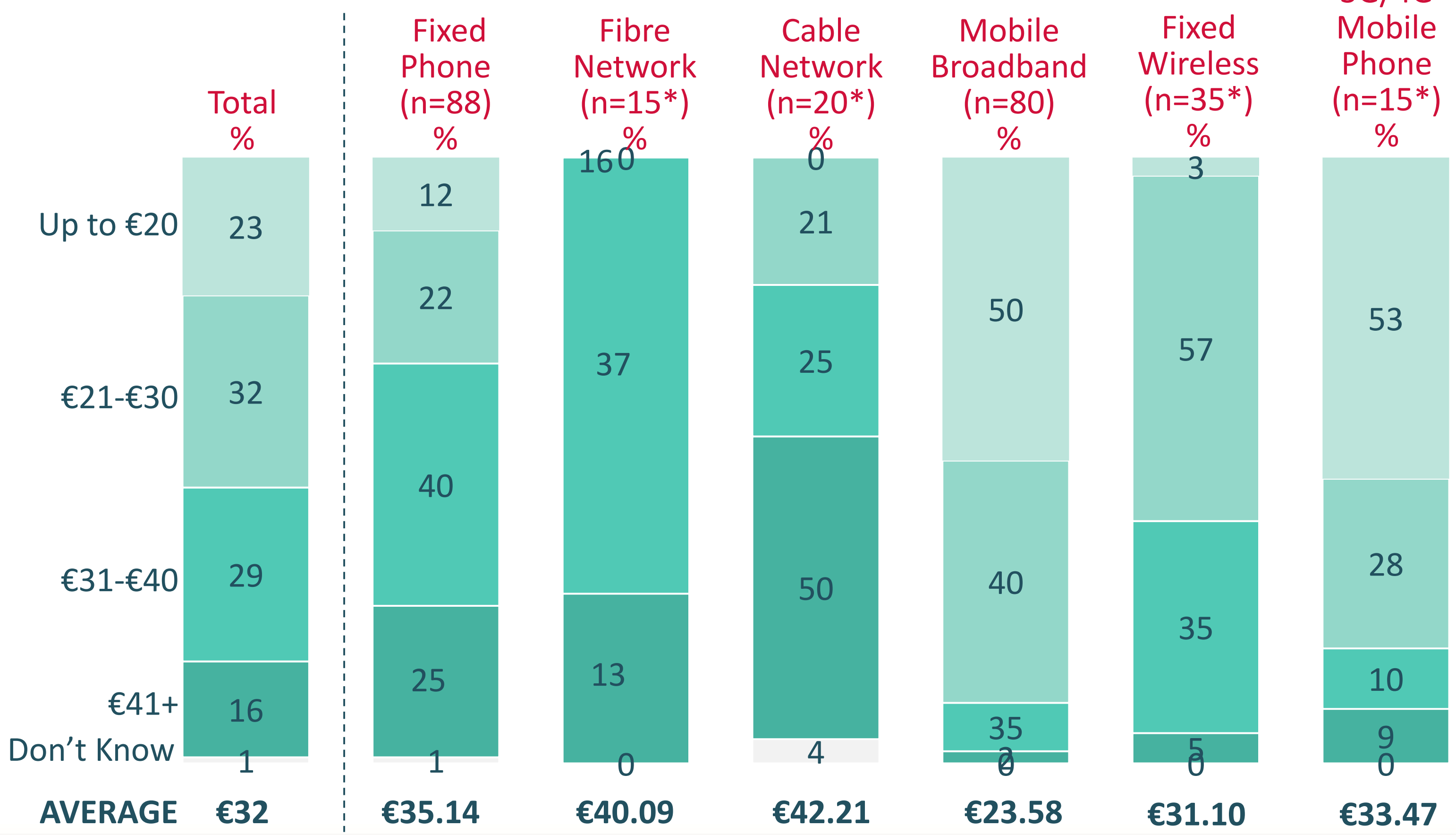
Small Base – Dublin

Average cost of broadband unbundled is €32 no significant difference by region

Typical Broadband Spend Per Month – (Non Bundle)

(Base: All Decision Makers With Broadband Access Non Bundle And Know How Much It Costs n=262)

Q.42How much do you and your household typically pay for broadband per month (excluding any promotional/introductory offers)?



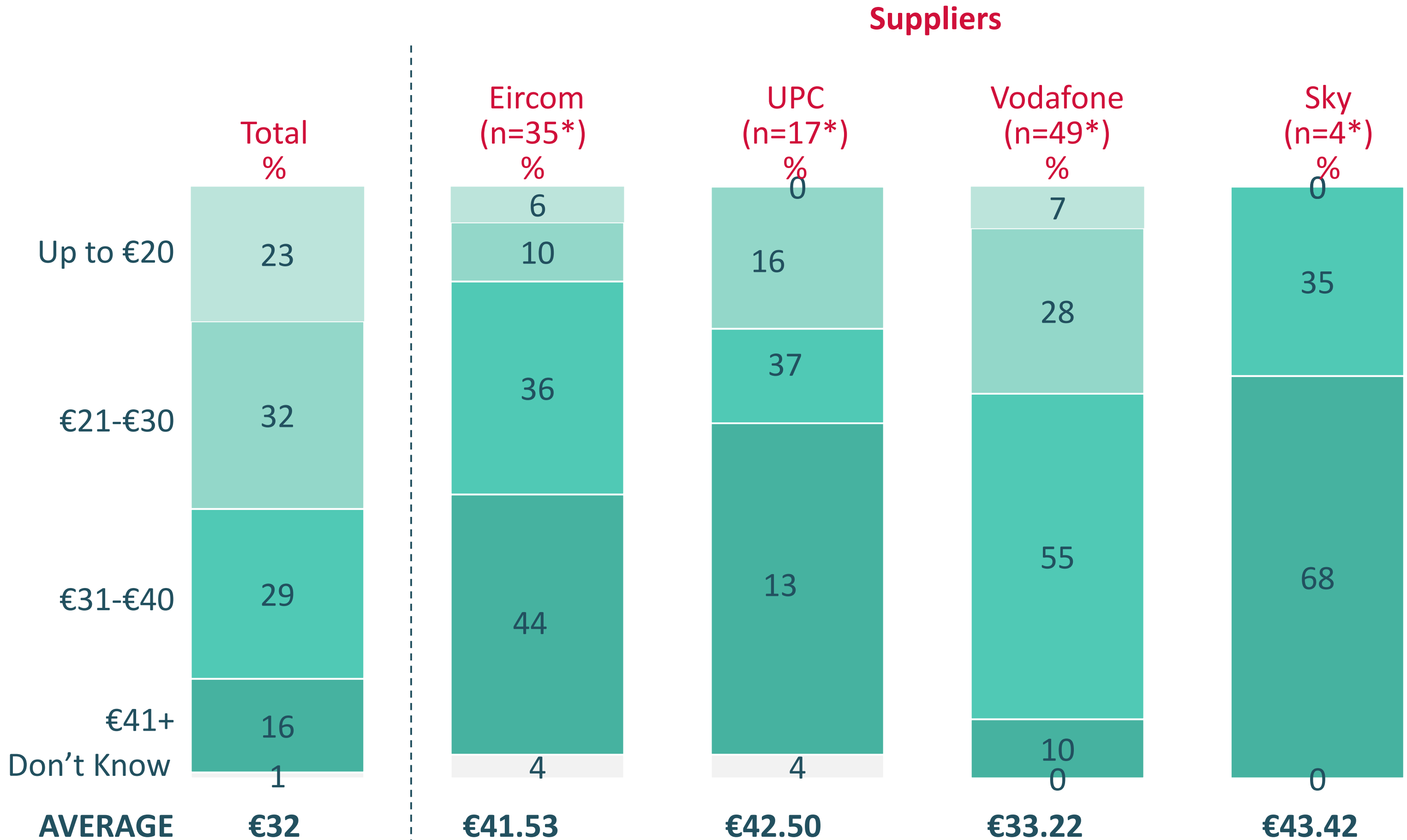
*Small Base

Average broadband spend per month unbundled is €32

Typical Broadband Spend Per Month – (Non Bundle)

(Base: All Decision Makers With Broadband Access Non Bundle And Know How Much It Costs n=262)

Q.42How much do you and your household typically pay for broadband per month (excluding any promotional/introductory offers)?



*Small Base

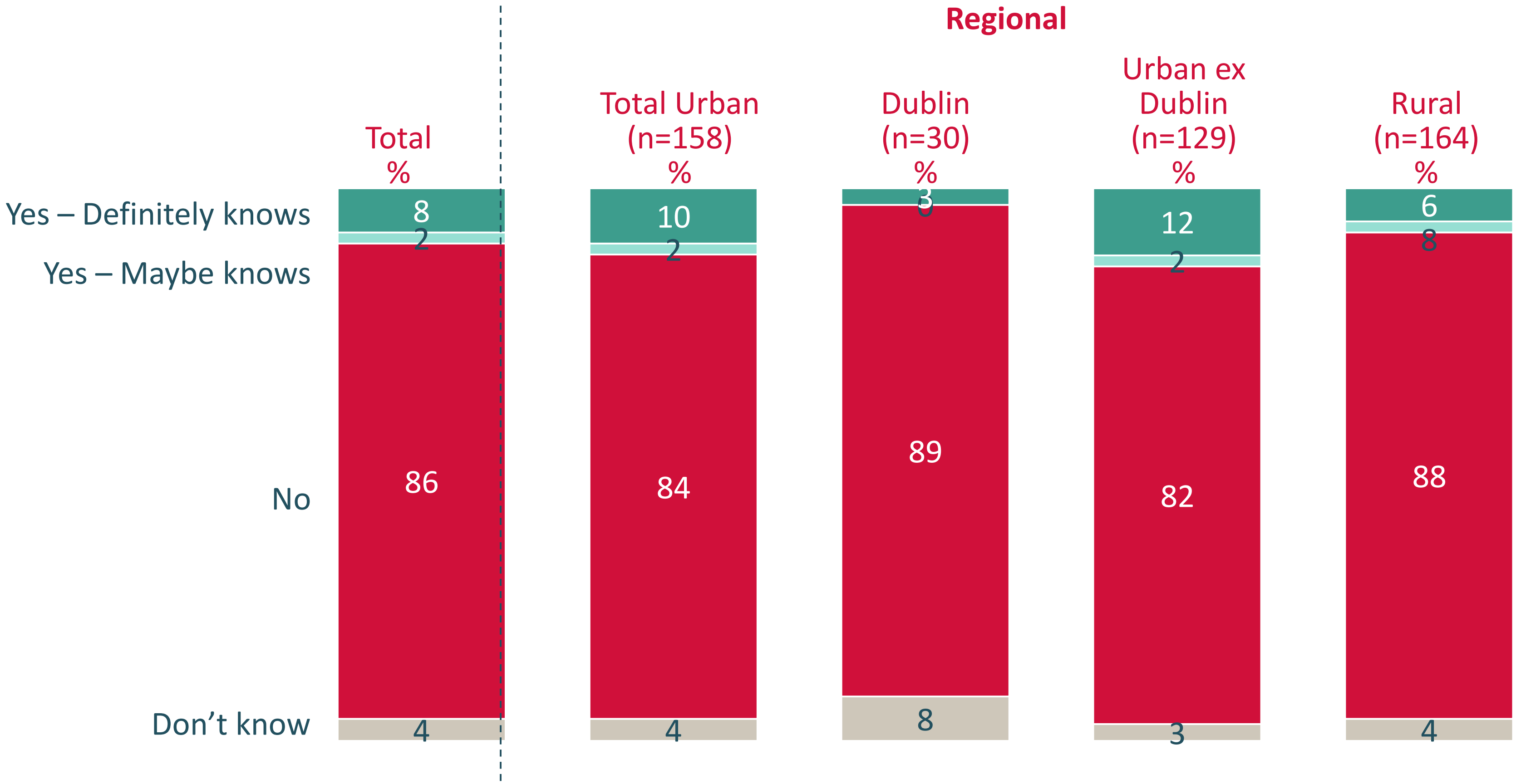
Indication that broadband spend per month is higher than average among eircom, UPC and Sky unbundled customers but base is too low to say this with statistical confidence

REDC

Does Monthly Amount Include Additional Charges?

(Base: All With Broadband Access Non Bundle Excluding Where Employer Pays, n=322)

Q.43 Does the monthly amount you pay for your broadband include any additional charges (e.g. usage charges, out of package calls charges etc.)?



Small Base – Dublin

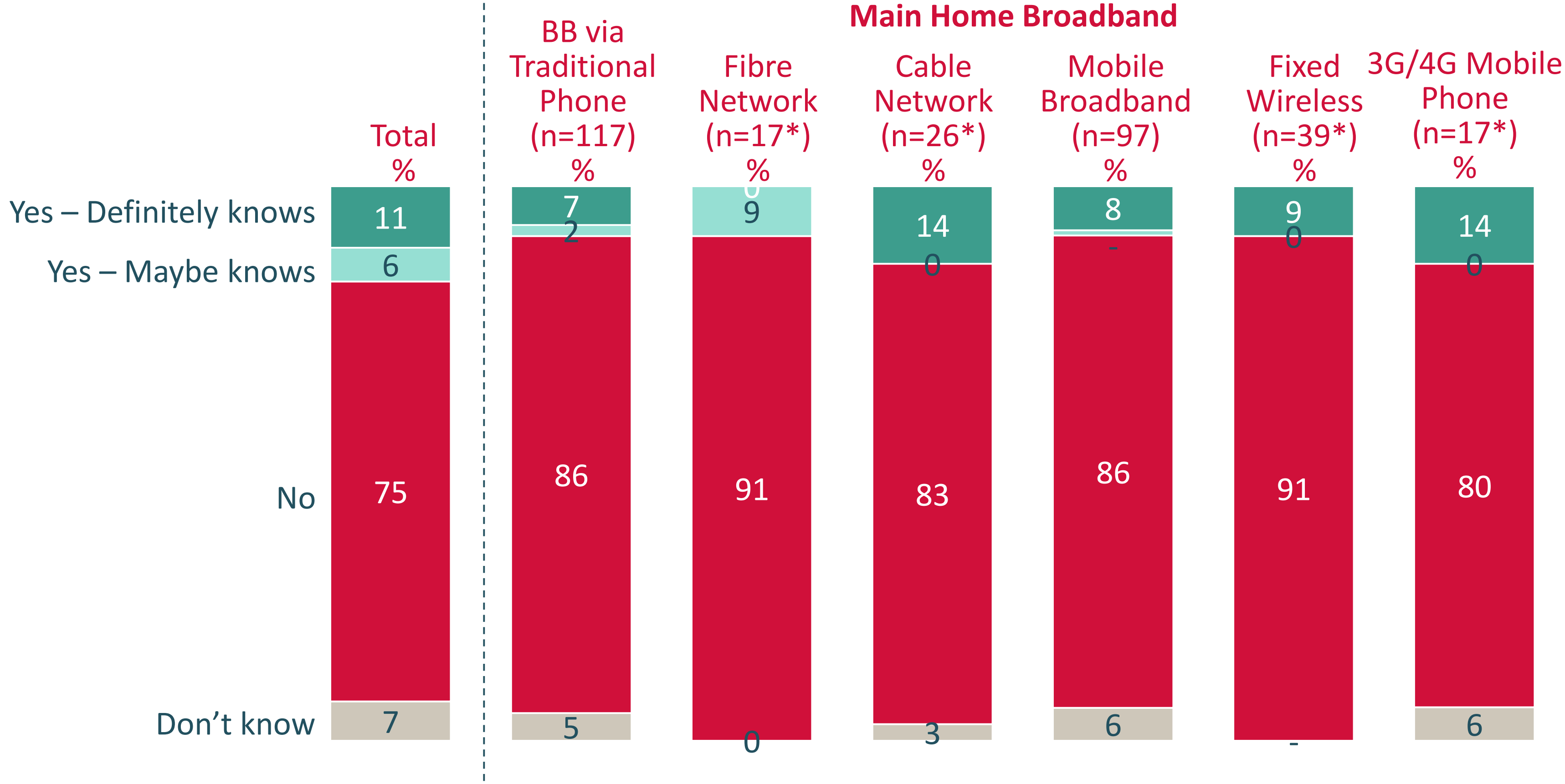
10% are any likely to claim there is an additional monthly amount on top of monthly broadband subscription.

REDC

Does Monthly Amount Include Additional Charges?

(Base: All With Broadband Access In A Specified Bundle Excluding Where Employer Pays, n=966)

Q.43 Does the monthly amount you pay for your broadband services include any additional charges (e.g. usage charges, out of package calls charges etc.)?



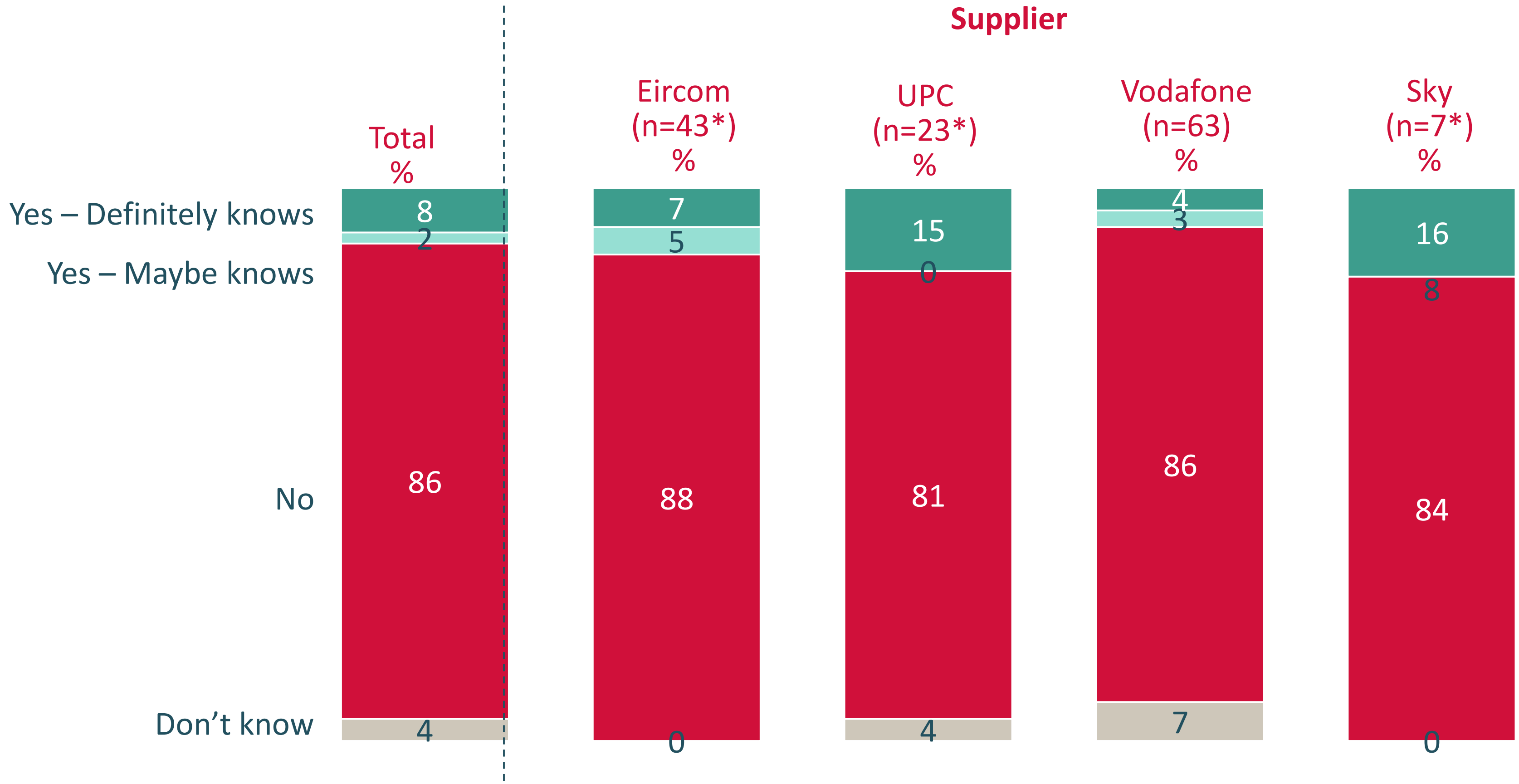
Small Base – n=6 Mobile Phone, n=0 Satellite,

17% are any likely to claim there is an additional monthly amount on top of monthly broadband bundle subscription.

Does Monthly Amount Include Additional Charges?

(Base: All With Broadband Access Non Bundle Excluding Where Employer Pays, n=322)

Q.43 Does the monthly amount you pay for your broadband include any additional charges (e.g. usage charges, out of package calls charges etc.)?



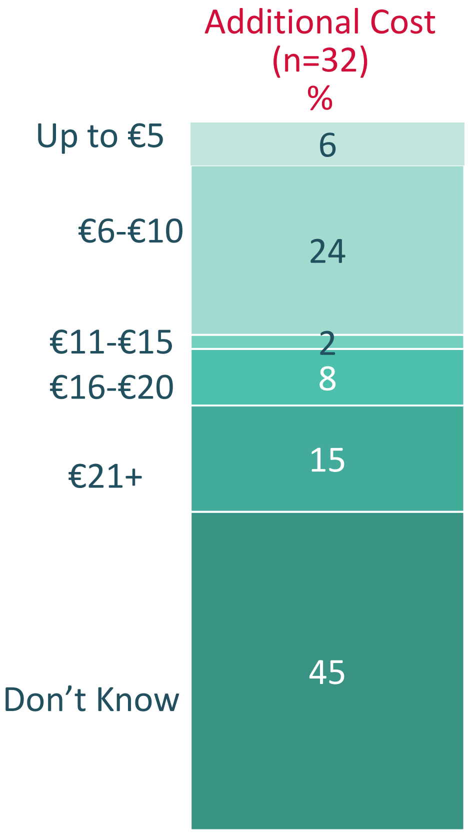
Small Base – Dublin

Indication that UPC and Sky customers are more aware of additional charges but customer base is low to say this with confidence

Typical Spend Per Month (Additional Charges)

(Base: All Non Bundle owner of each type who are aware of additional charges – 32*)

Q.44 Can you estimate the cost of these additional charges?



Mean **€17.98**

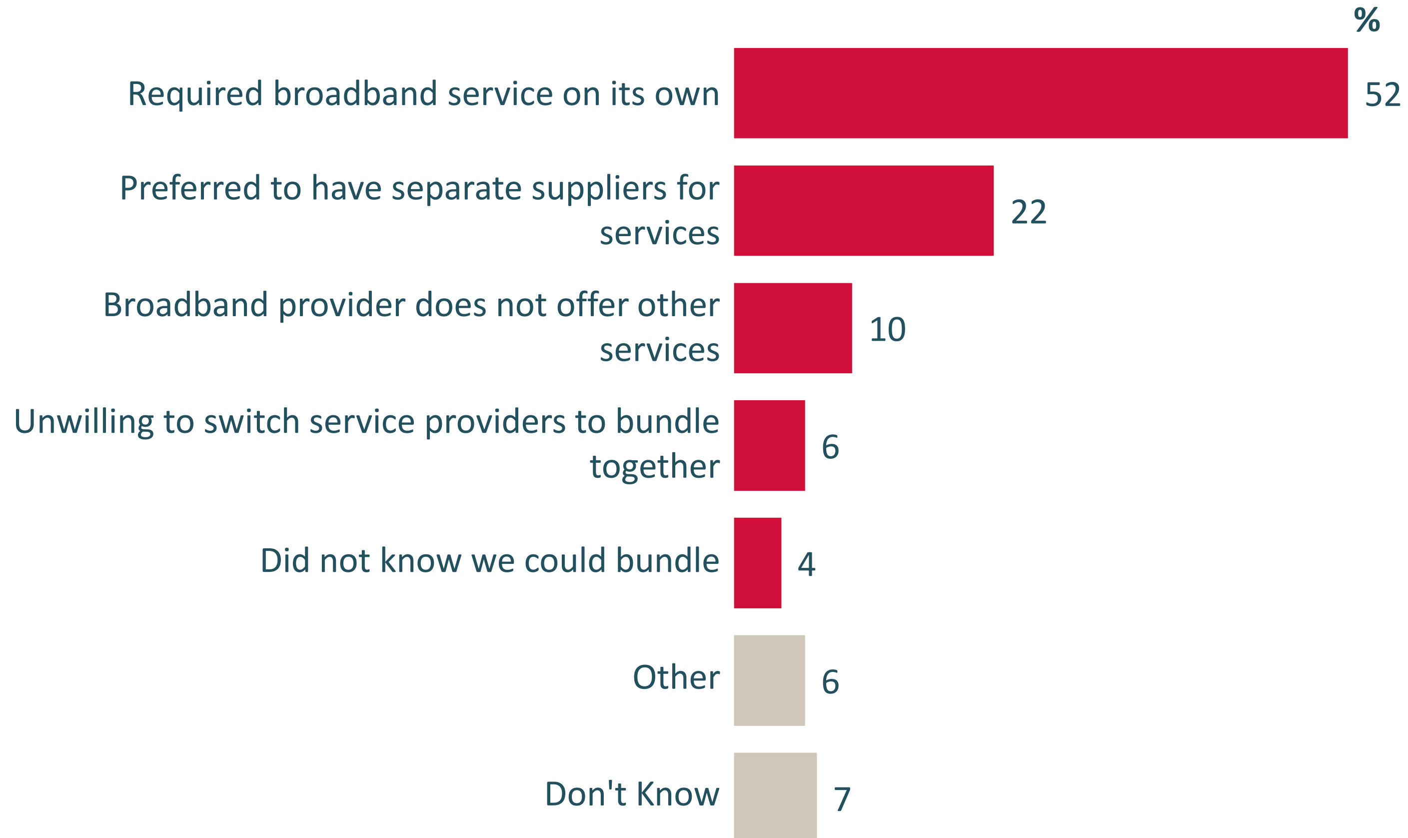
* Small base

Average additional charge to standalone broadband is €17.98

Reason For Unbundled Broadband – Multiple Responses

(Base: All respondents who have unbundled broadband access at home =198)

Q45 Why did you and your household choose to purchase your broadband service independent of your other communication services (telephone, TV etc.)



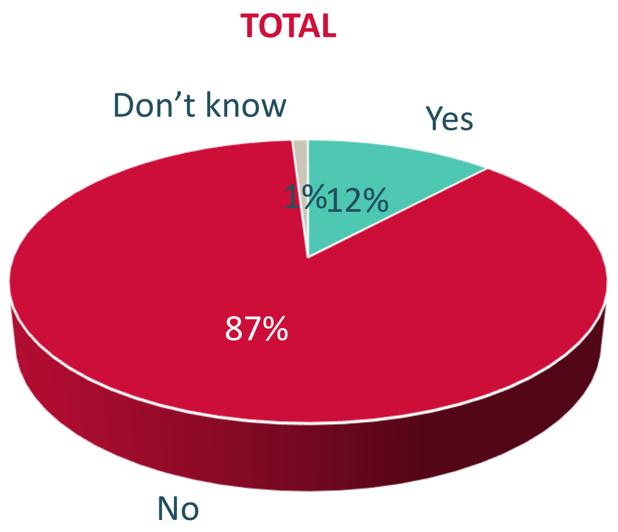
52% do not bundle their broadband services they required a broadband services on its own. 22% prefer to have separate supplier for the services they have.

REDC

Incidence of Previous Bundle

(Base: All Decision Makers With Unbundled Broadband Access At Home, N=322)

Q46 Did you and your household previously purchase broadband with other services in a bundle?



	Total Urban (n=158) %	Total Dublin (n=30*) %	Total Urban Excl. Dublin (n=129) %	Rural (n=164) %
Yes	11	13	11	13
No	87	87	86	87
DK	2	0	3	0

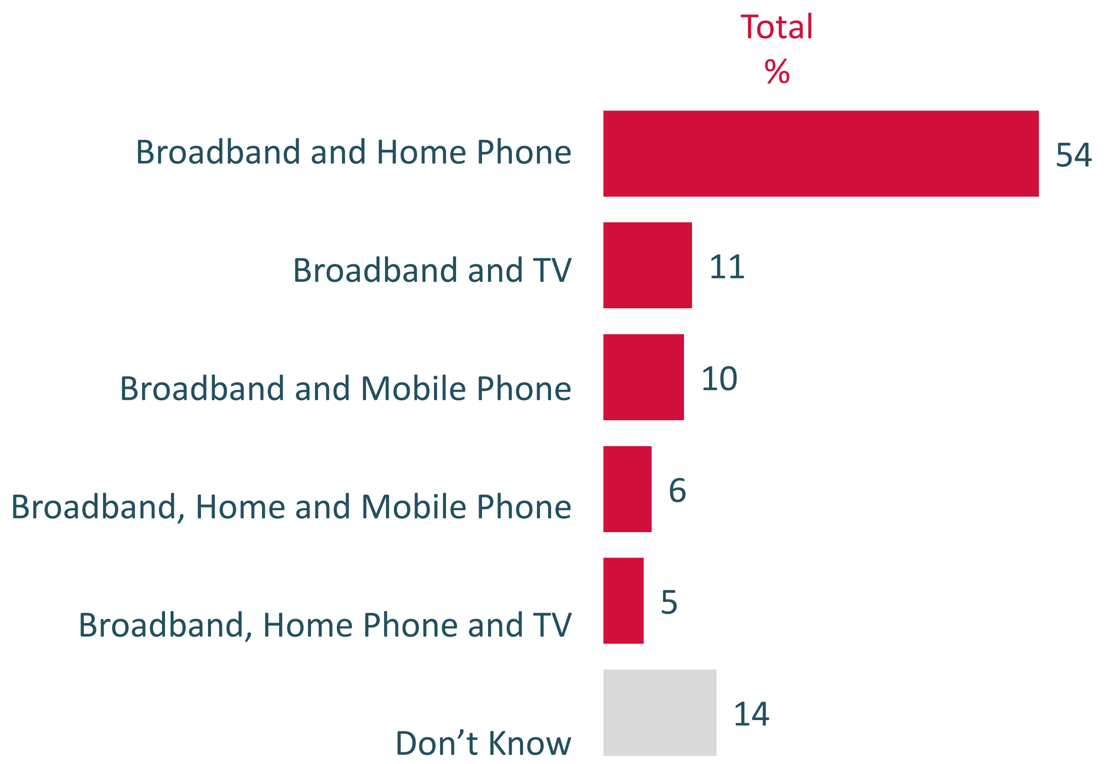
* Dublin base small

12% of those who currently don't have a broadband bundle previously ever purchased broadband in a bundle.

Bundle Type Held (Previous Bundle Holders)

(Base: All With Broadband Access who previously held a bundle, n=39*)

Q.47 What services were in your bundle?



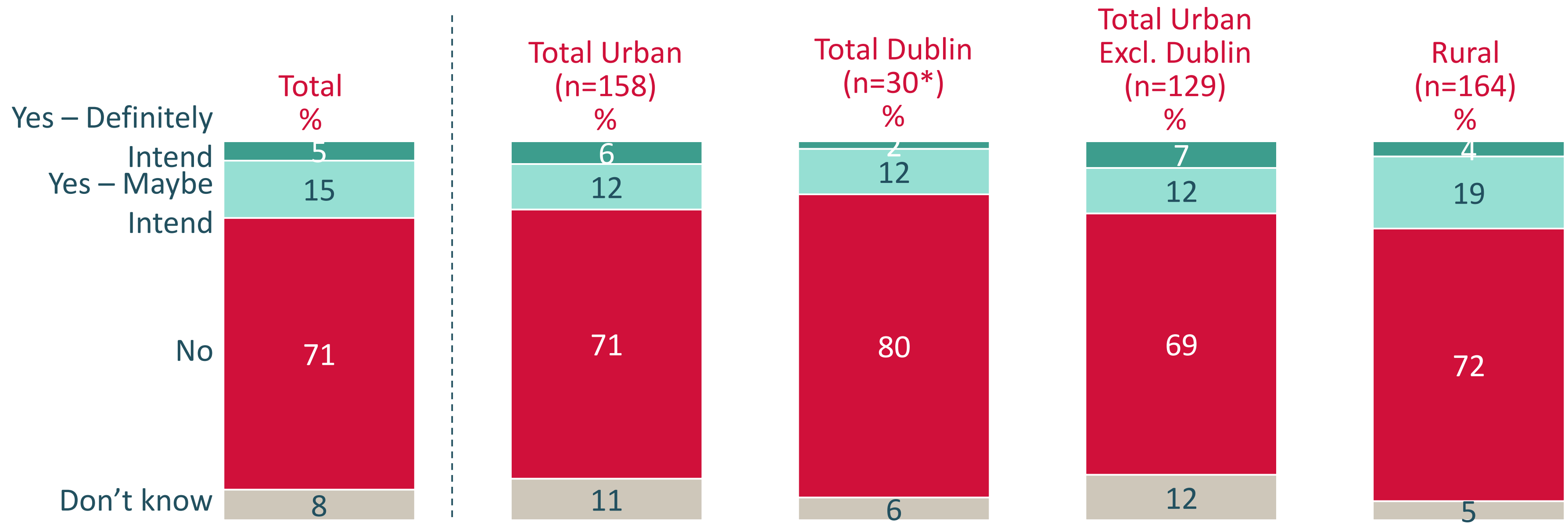
* Small base

54% who previous held a bundle had a broadband and home phone bundle

Intention To Bundle Broadband Service In Next 12 Months

(Base: All Respondents With Unbundled Broadband Access, n=322)

Q.48 Do you and your household intend to purchase your broadband service as part of a broader package with other services over the next 12 months – i.e. receive a single bill for 2 or more services from one provider?



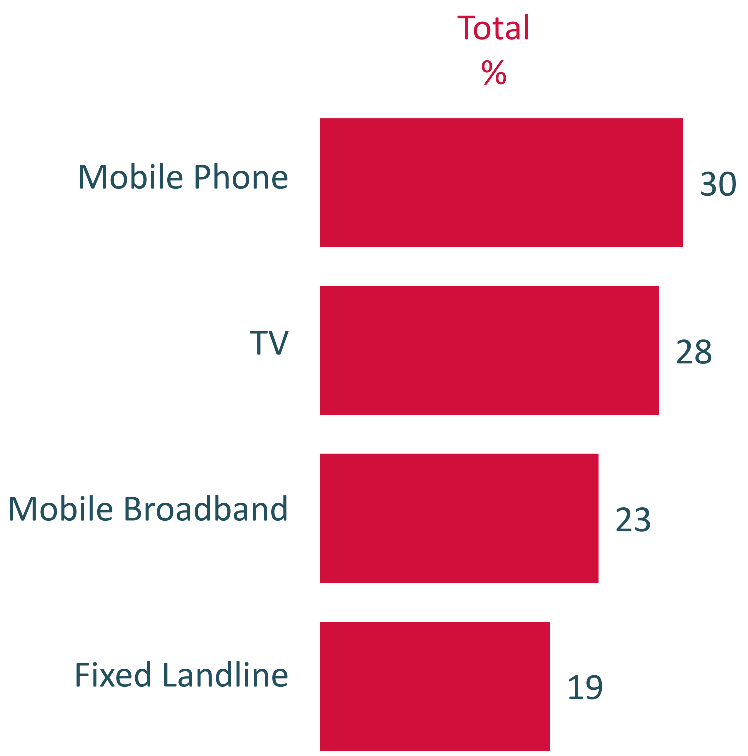
* Dublin base small

20% of those without a broadband bundle have any intention to bundle their broadband service in the next 12 moths. Highest for rural areas at 23%.

1ST Preference of What to Bundle with Broadband (Bundle Intenders)

(Base: All Non bundle who intend to bundle next six months, n=66)

Q.50 What services do you wish to bundle with broadband?



30% of those intending to get a bundle intend to bundle broadband with mobile phone.

REDC

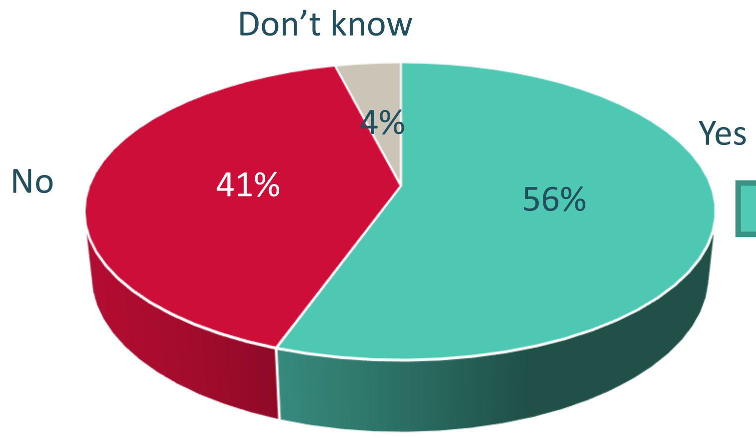
Contracts&
Switching

Currently in Contract with Broadband Service Provider?

(Base: All Respondents With Broadband Access At Home who pay for own bill n=1298)

Q.37 Thinking about your main broadband service are you and your household currently tied into a contract with your service provider?

Total



Main Broadband Type

	BB via Traditional Phone (n=755) %	Fibre Network (n=67) %	Cable Network (n=272) %	Mobile broadband (n=116) %	Fixed Wireless (n=52) %	Mobile Phone (n=22*) %	Satellite (n=6*) %
Yes	64	82	43	32	33	37	-
No	32	18	53	67	65	52	100
Don't Know	5	-	4	1	1	11	-

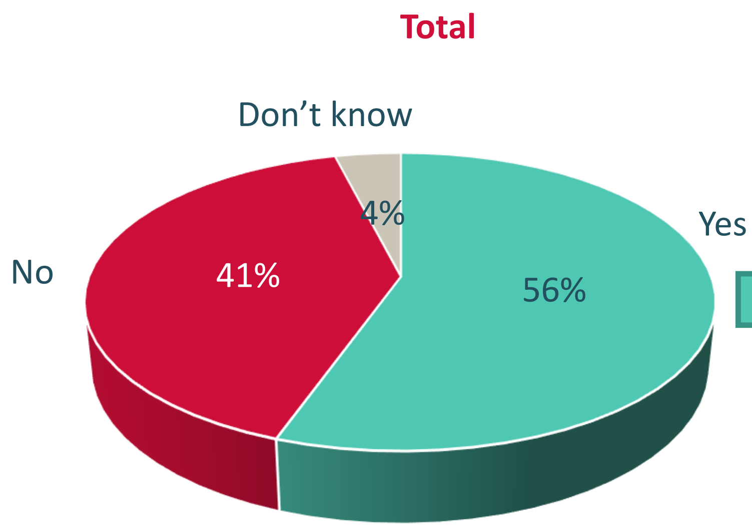
* Mobile Phone and Satellite base small

56% are currently in contract with broadband service provider. This figure rises to 82% for those connecting to broadband via a fibre network.

Currently in Contract with Broadband Service Provider?

(Base: All Respondents With Broadband Access At Home who pay for own bill n=1298)

Q.37 Thinking about your main broadband service are you and your household currently tied into a contract with your service provider?



Main Supplier

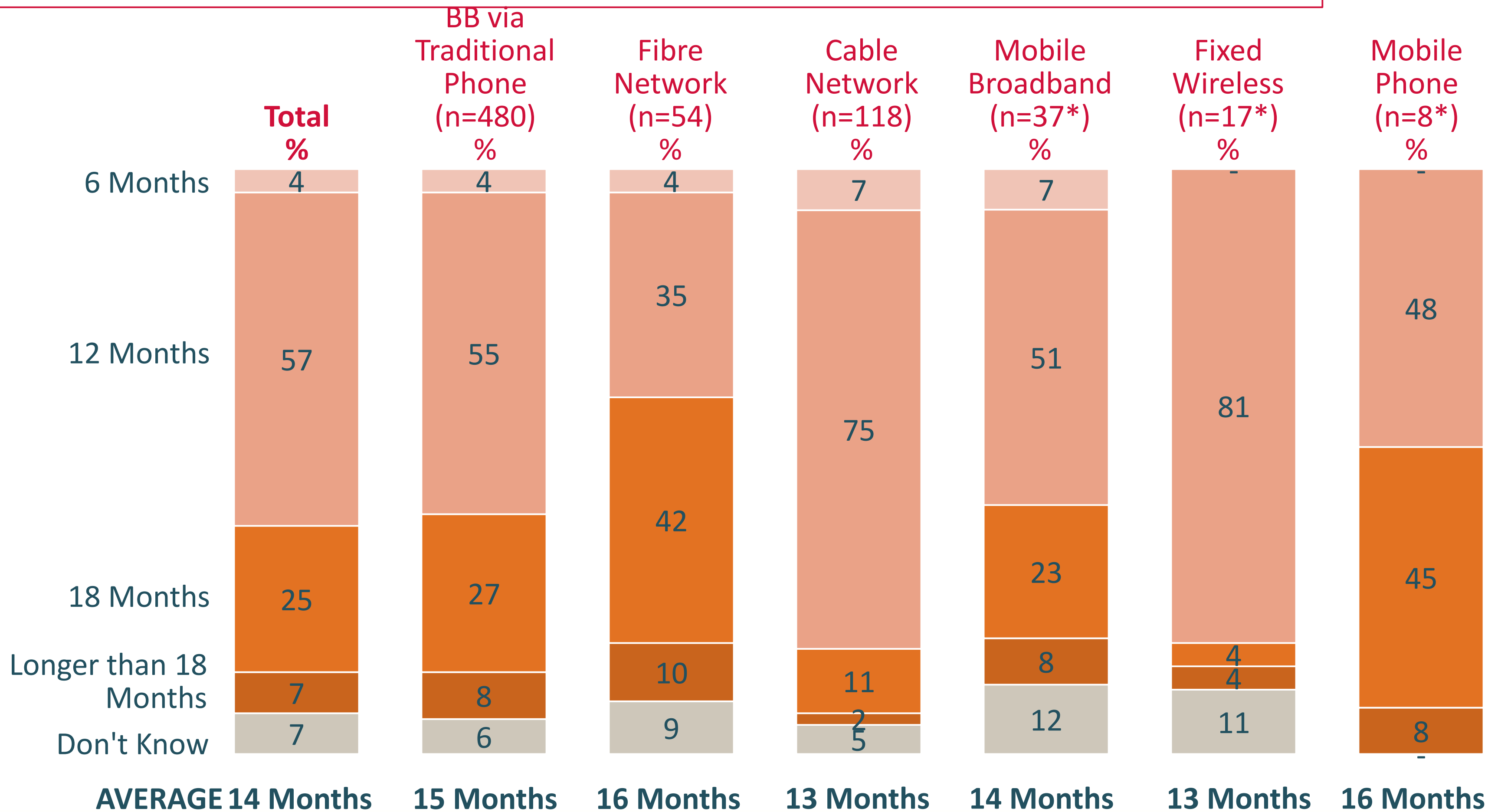
	Eircom (n=437) %	UPC (n=265) %	Vodafone (n=233) %	Sky (n=106) %
Yes	62	43	69	70
No	32	52	30	26
Don't Know	6	4	1	5

UPC have the lowest in contract rate at 43%

Minimum Contract Period of Broadband Service

(Base: All With Broadband Access And Currently In Contract Excl. Where Employer Pays, n=720)

Q.38 What is the minimum contract period of this service? From sign up time to when you can leave your provider.



* = Small base

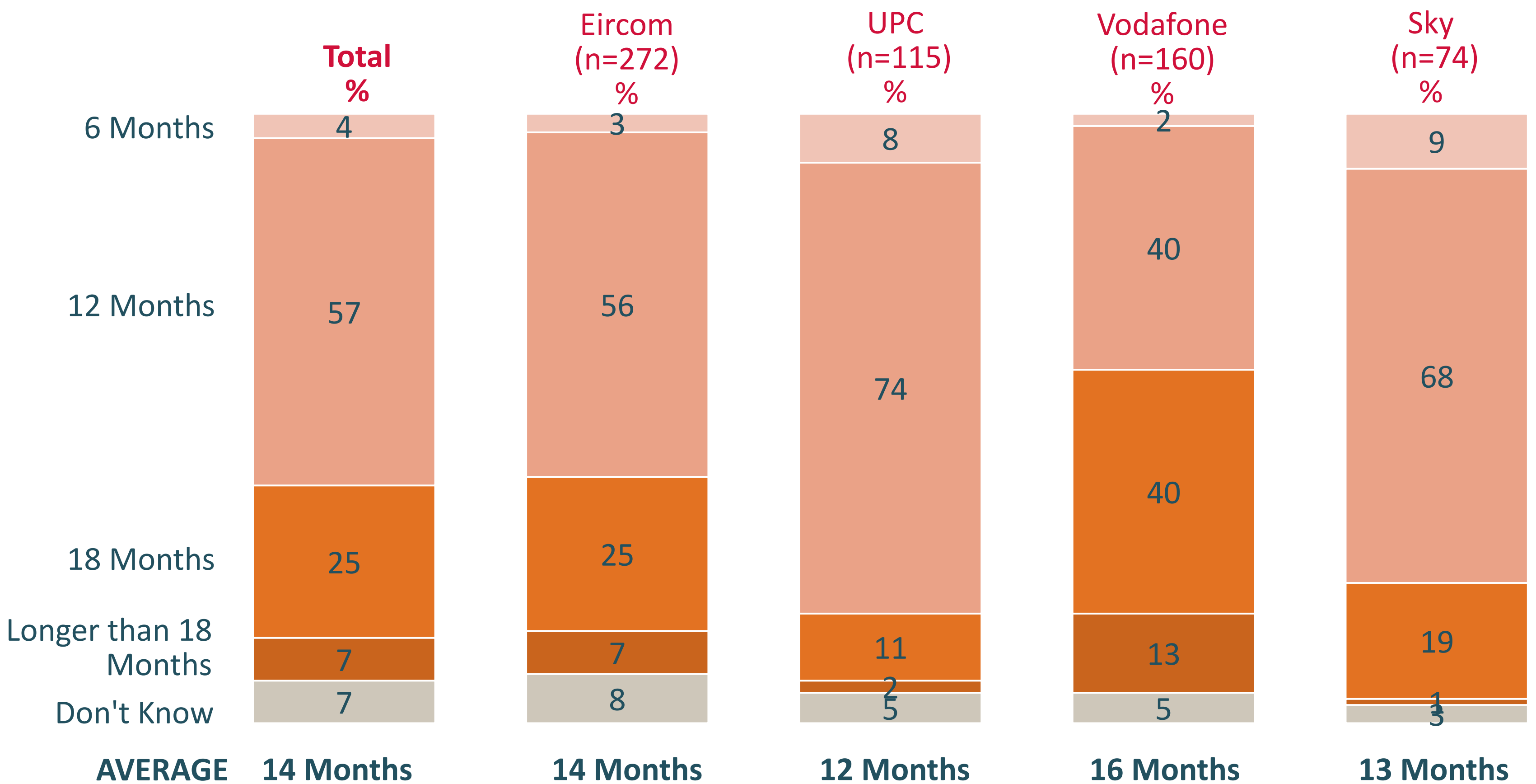
Small Base – Satellite n = 2

The average contract period of the broadband service is 14months, longer for those connecting on a fibre network.

Minimum Contract Period of Broadband Service

(Base: All With Broadband Access And Currently In Contract Excl. Where Employer Pays, n=720)

Q.38 What is the minimum contract period of this service? From sign up time to when you can leave your provider.

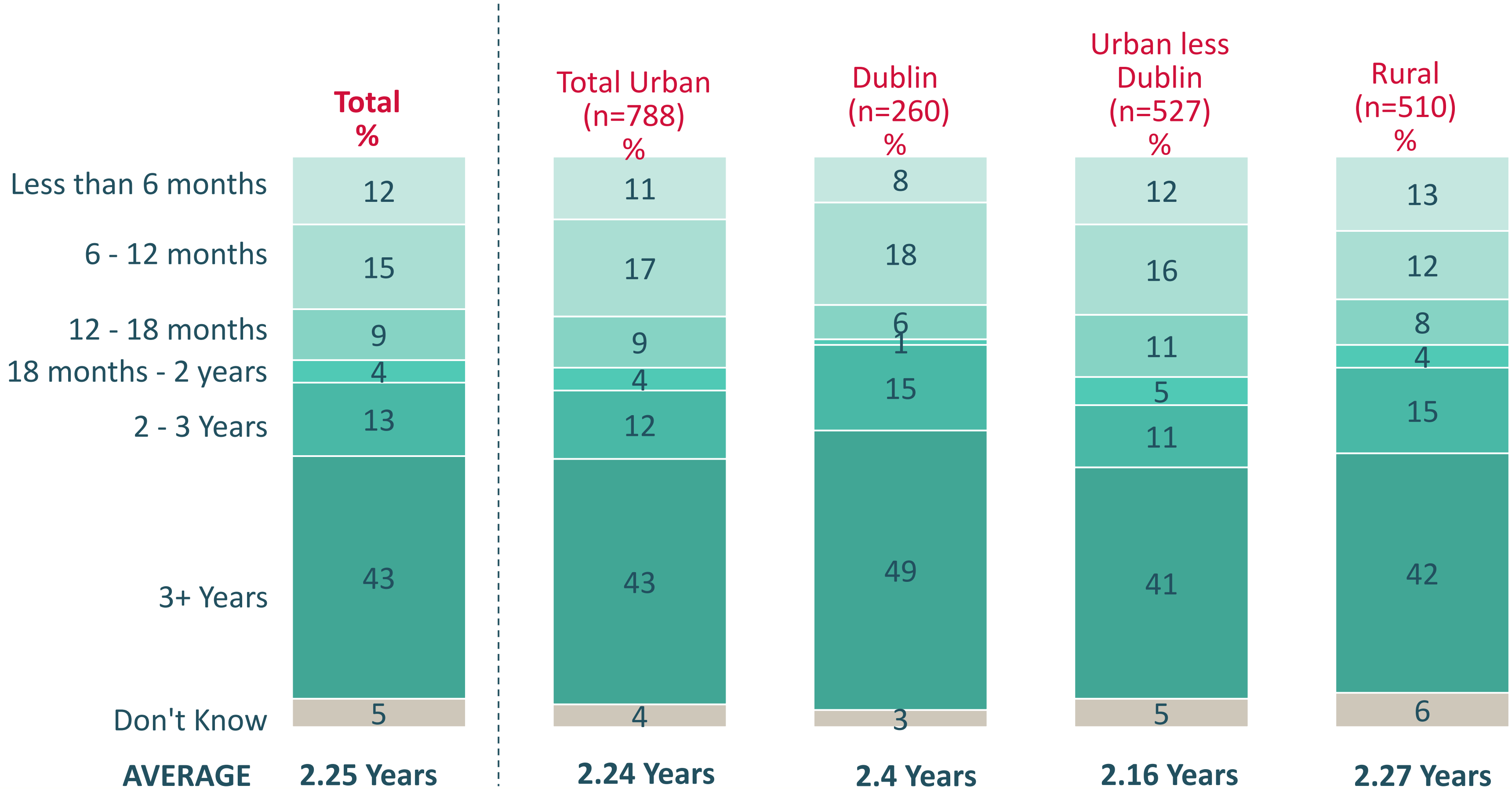


Current Vodafone customers state the longest contract period of 16 months from sign up to when they can leave supplier

Length Of Time With Current Broadband Supplier

(Base: All Respondents With Broadband Access At Home who pay own bill, n=1298)

Q.39 How long have you and your household been with your current main broadband supplier for?

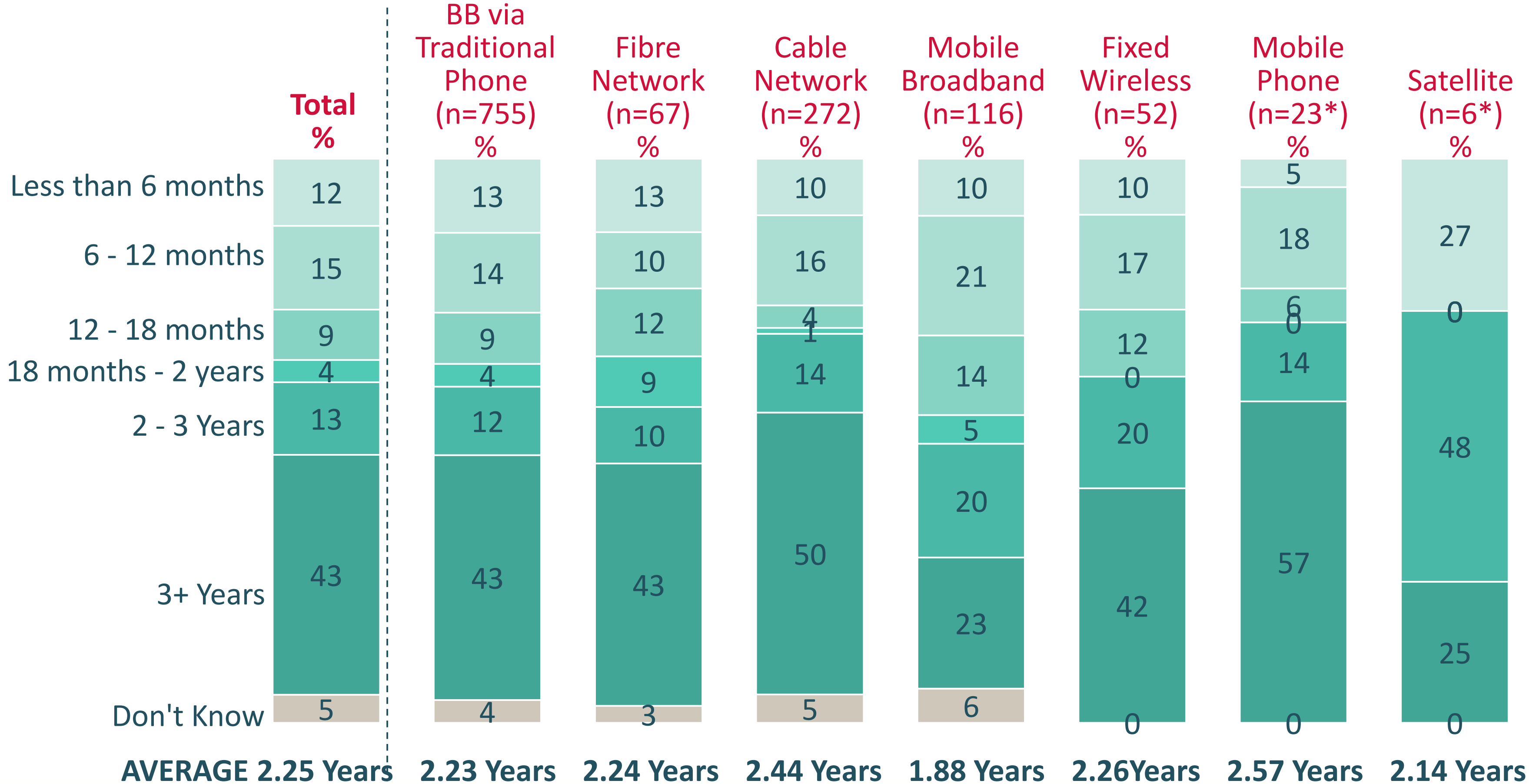


The average length of time with current broadband supplier is 2.25 years. No significant difference by region.

Length Of Time With Current Broadband Supplier

(Base: All Respondents With Broadband Access At Home who pay own bill, n=1298)

Q.39 How long have you and your household been with your current main broadband supplier for?



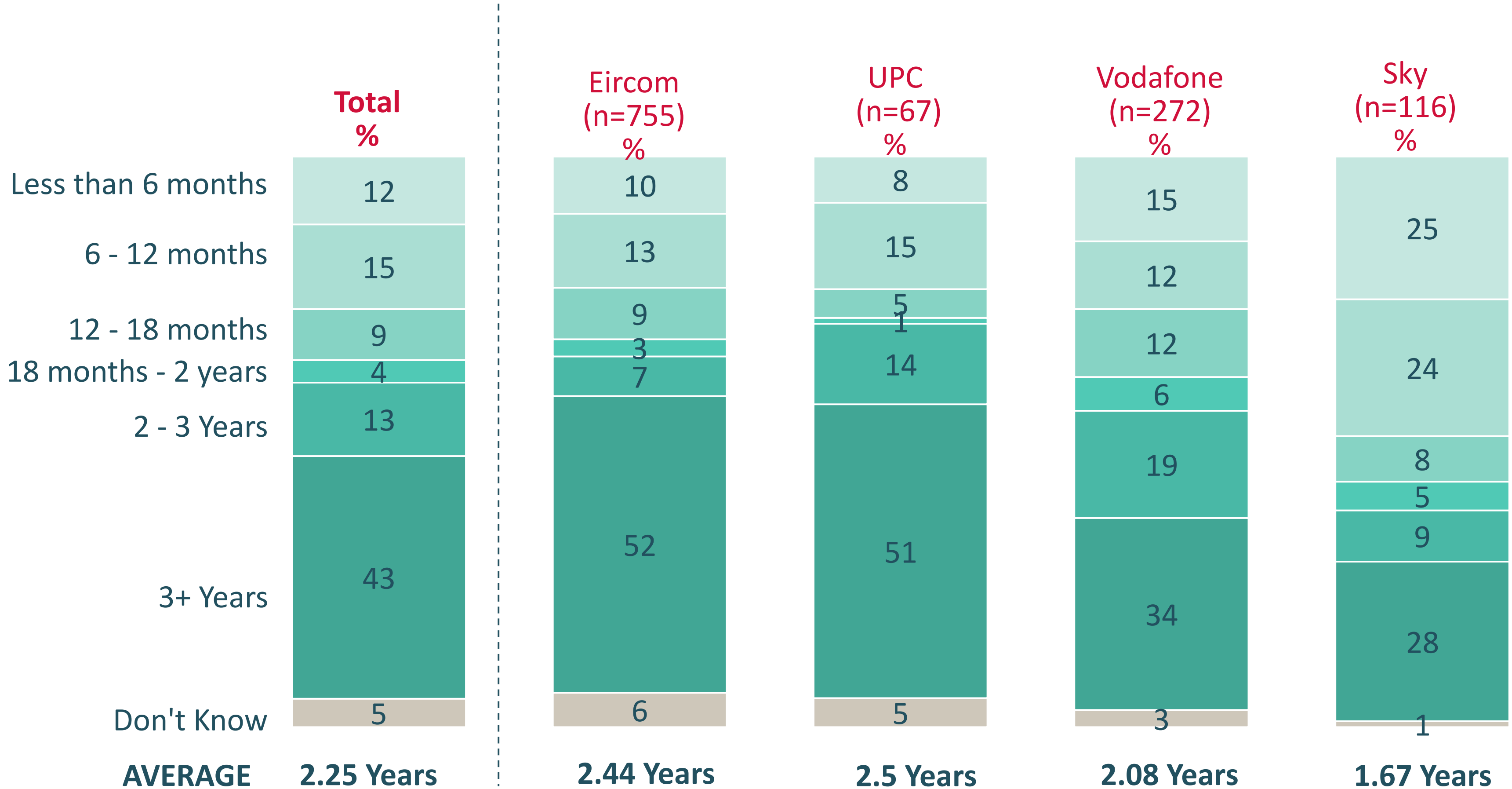
* = Small base

The average length of time with current broadband supplier is 2.25 years. Longest for those who connect via a cable network. Shortest for mobile broadband at 1.88 years.

Length Of Time With Current Broadband Supplier

(Base: All Respondents With Broadband Access At Home who pay own bill, n=1298)

Q.39 How long have you and your household been with your current main broadband supplier for?



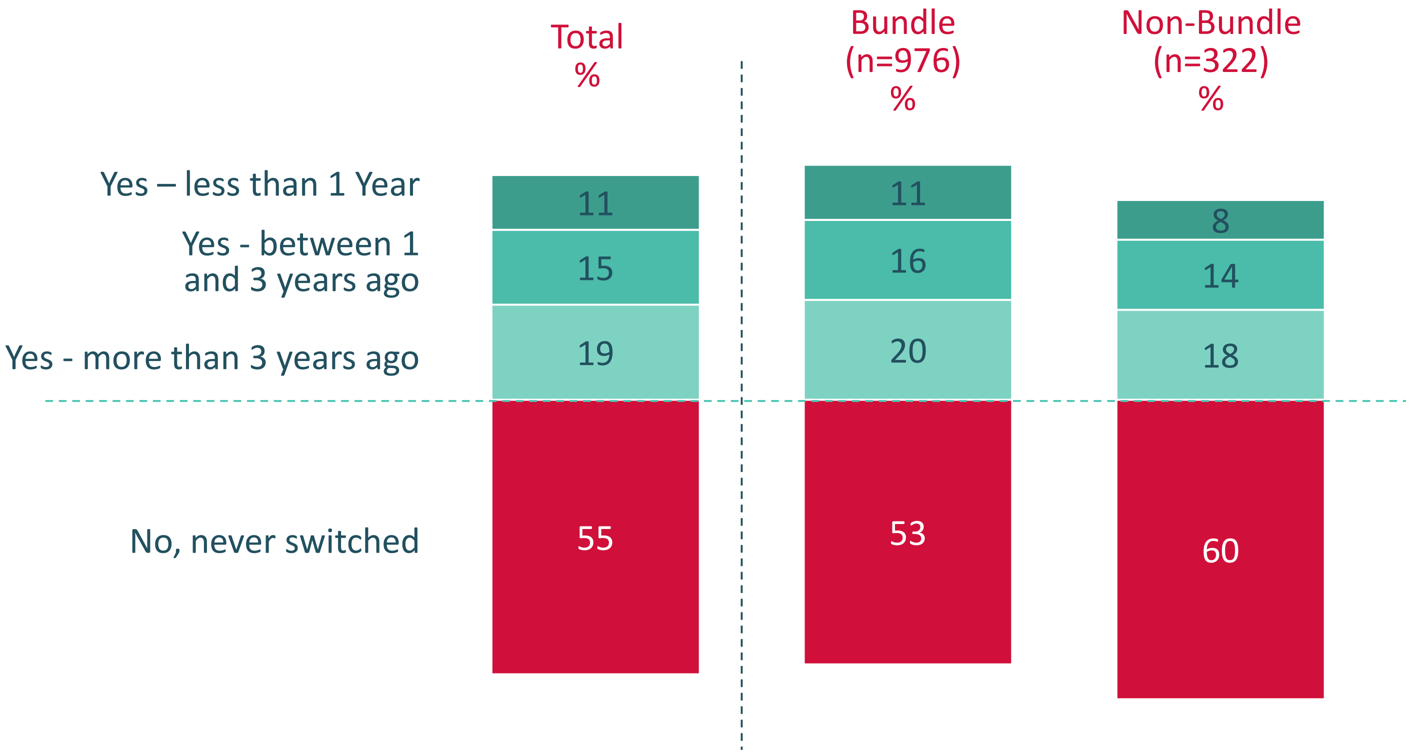
The average length of time with current broadband supplier is 2.25 years. Shortest for Sky which is the newest entrant in the market.

REDC

Incidence Of Ever Switching Broadband Supplier At Home?

(Base: All With Broadband Access At Home who pay own bill, n=1298)

Q.61 Have you and your household ever switched broadband supplier in your home?



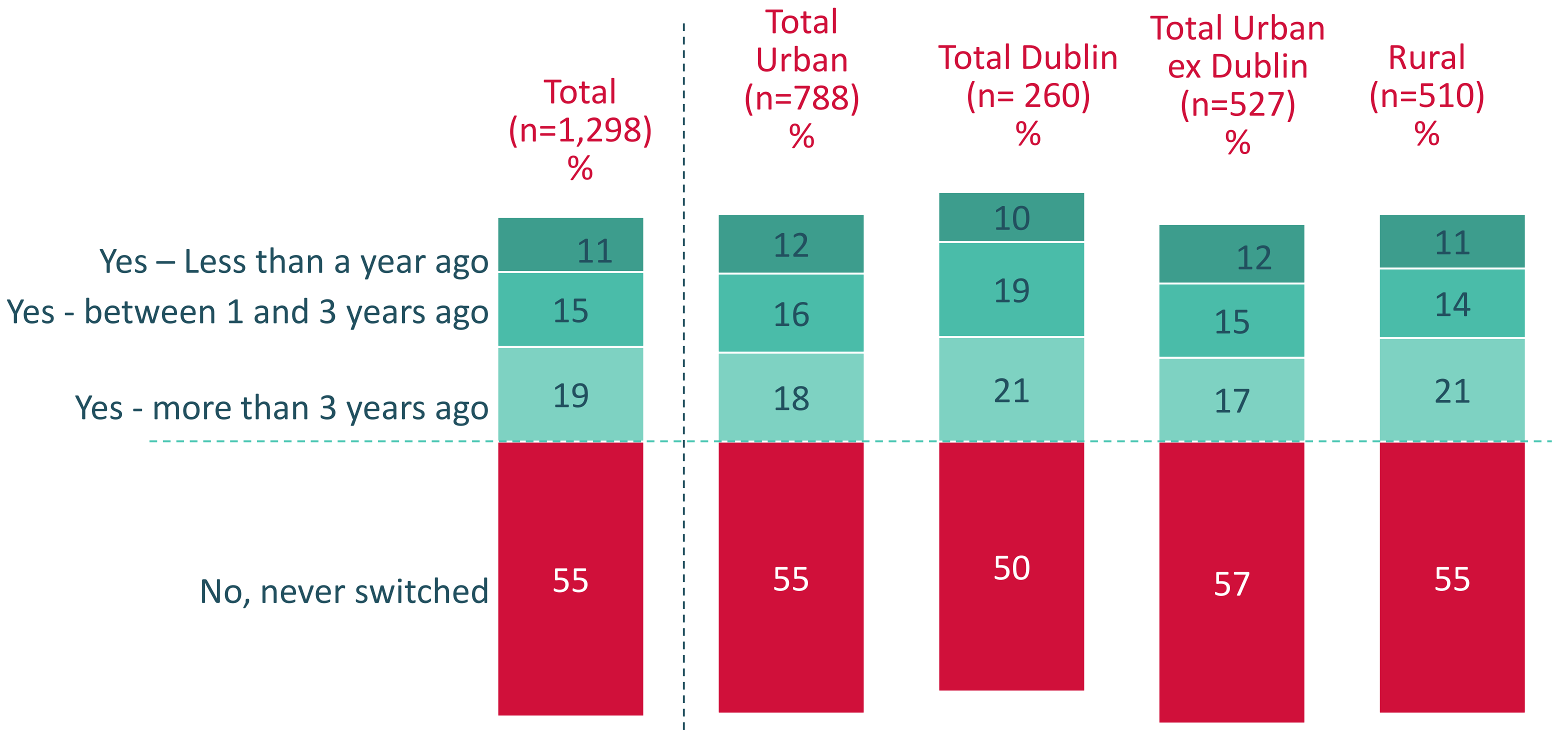
45% nationally have ever switched broadband supplier. Those within a broadband bundle are more likely to switch broadband supplier than non bundle broadband 47% v 40%.

REDC

Incidence Of Ever Switching Broadband

(Base: All Decision Makers with Broadband Access n=1298)

Q.61 Have you and your household ever switched broadband supplier in your home?

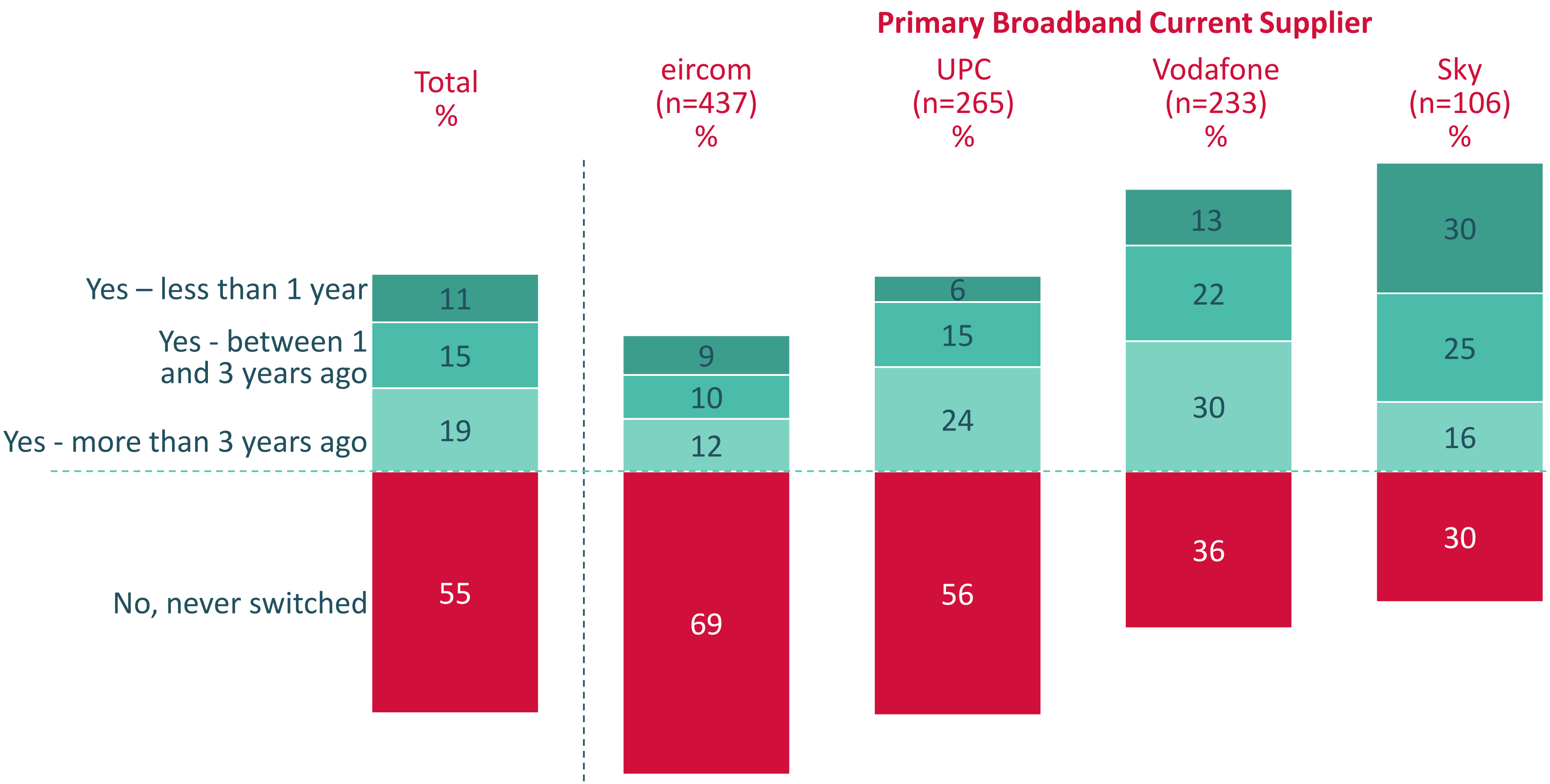


Those ever switching broadband service are most likely from Dublin at 50% doing so.

Incidence Of Ever Switching Broadband

(Base: All Decision Makers with Broadband Access n=1298)

Q.61 Have you and your household ever switched broadband supplier in your home?

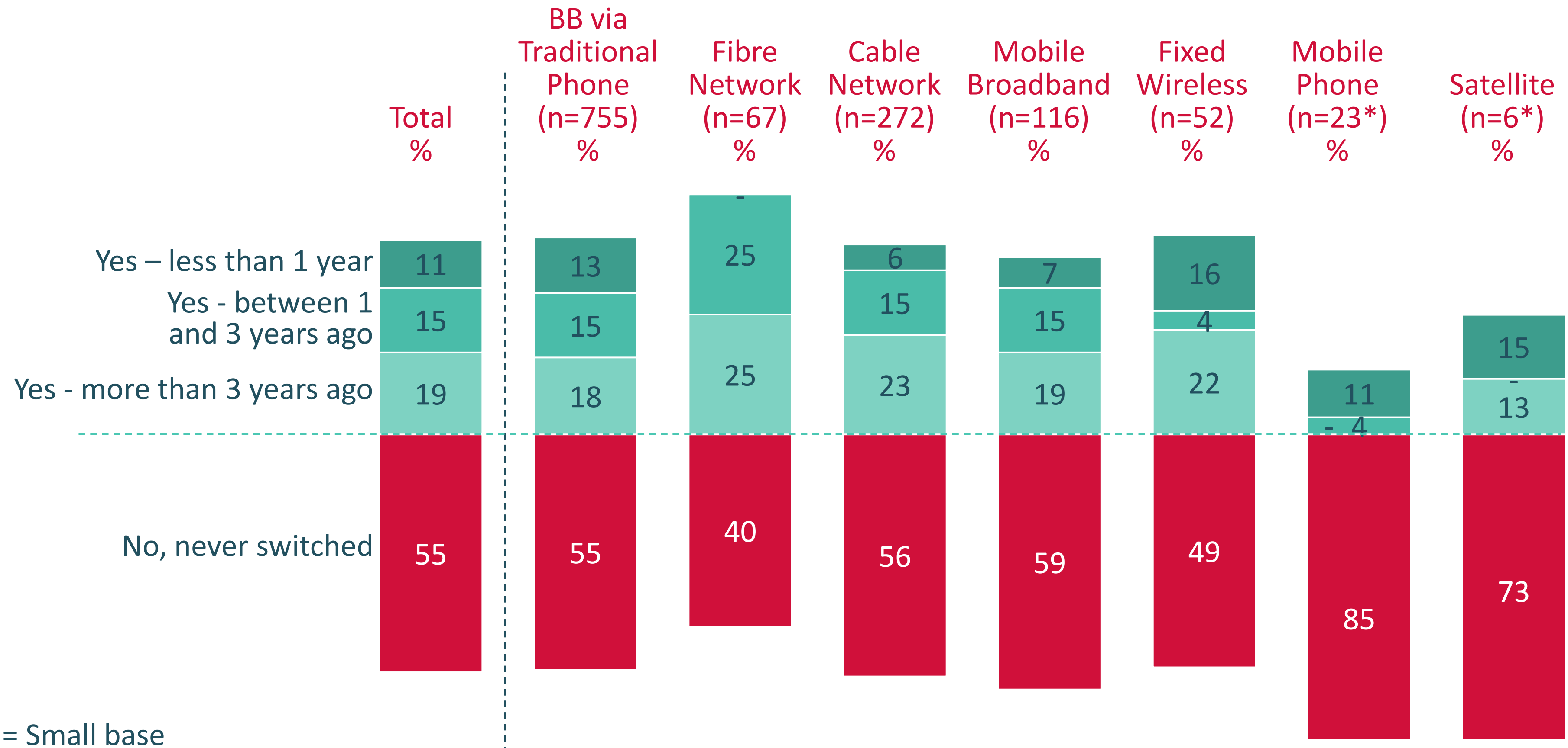


69% of Eircom customers claim to have never switched their broadband service. This figure is lowest for the newest broadband supplier Sky at 30%.

Incidence Of Ever Switching Broadband

(Base: All Decision Makers with Broadband Access n=1298)

Q.61 Have you and your household ever switched broadband supplier in your home?



* = Small base

Those currently access broadband via a fibre network are least likely to have ever switched broadband supplier at 40% claiming they haven't switched.

Previous Broadband Supplier – Switched From

(Base: All Decision Makers Who Have Previously Switched Broadband Supplier=585)

Q.62 What operator previously provided you and your household with your last broadband service? SINGLE CODE

Primary Current Broadband Supplier

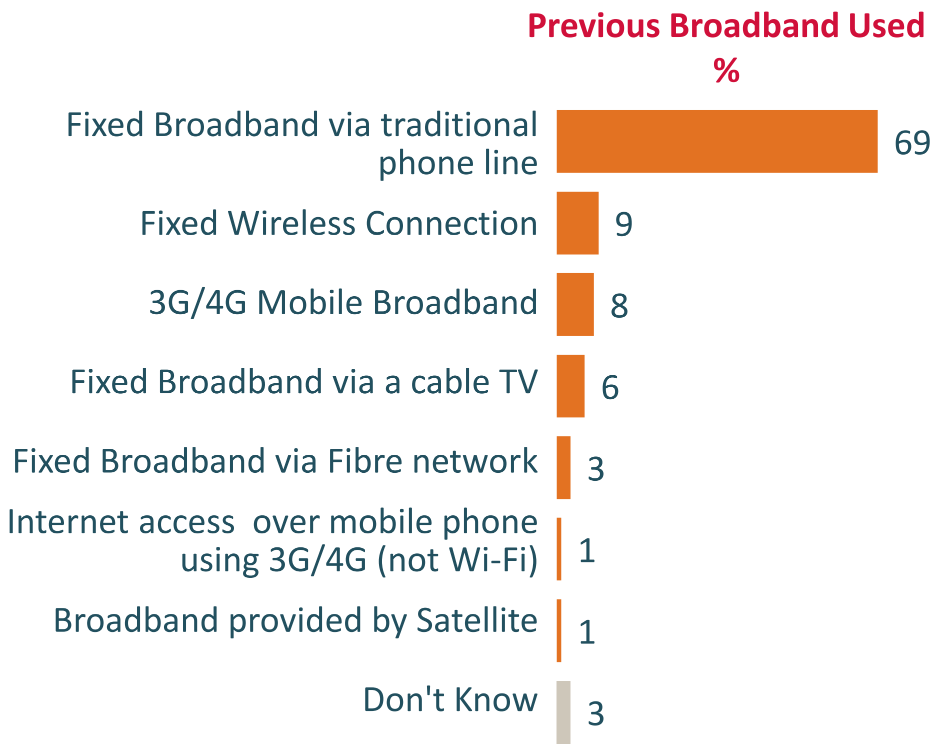
Previous Provider of Broadband	Total %	eircom (n=136) %	UPC (n=117) %	Vodafone (n=150) %	Sky (n=75) %
eircom	49	-	68	75	46
Vodafone	19	39	10	-	26
UPC	8	15	-	4	16
Three	4	2	1	5	3
Sky	4	7	6	2	-
O2	3	1	1	3	2
Imagine	3	8	3	1	1
Digiweb/Smart	2	6	1	1	1
Gaelic Telecom	1	2	-	1	-
Pure	1	3	-	-	1
Other	3	6	3	3	-
Don't Know	3	11	8	5	3

49% of broadband switchers claim previous provider as Eircom with the majority of these 75% now currently with Vodafone.

Previous Broadband Type Used - I

(Base: All Respondents Who Have Previously Switched Broadband Excl. Where Employer Pays, n=585)

Q63. Thinking about your previous broadband supplier which of the following access modes did you previously use?

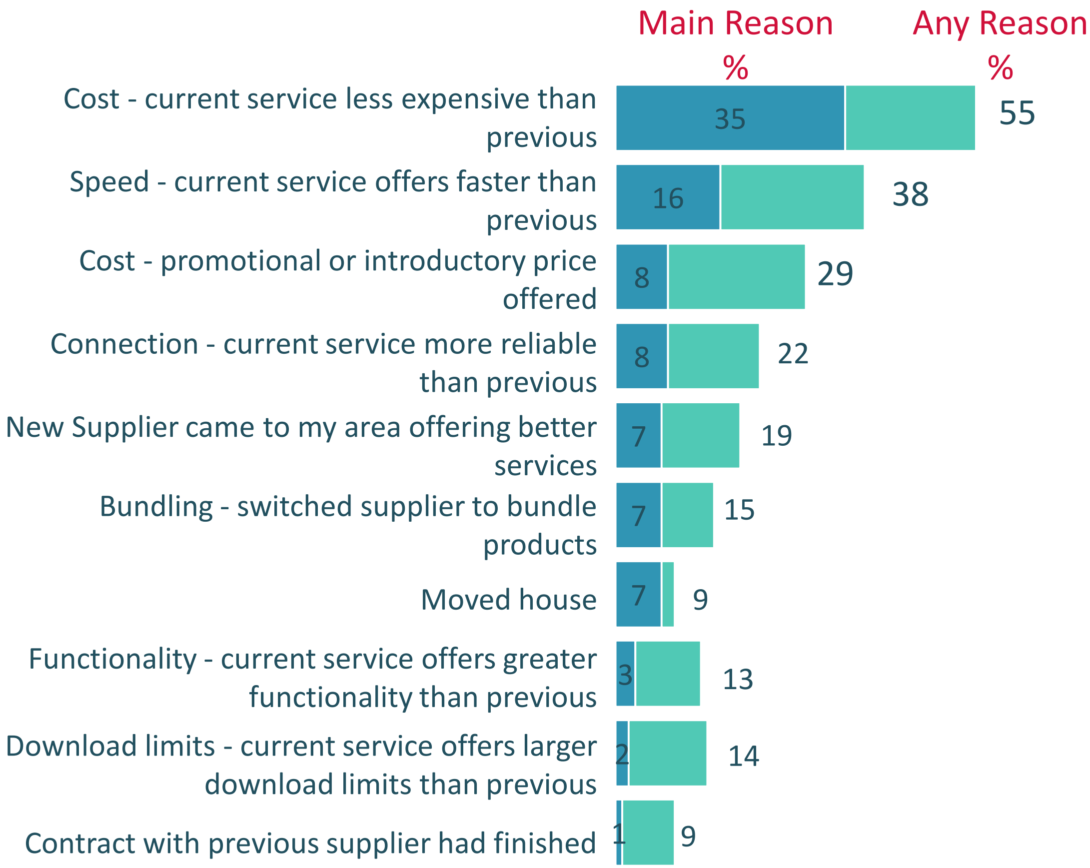


Among the switching population the type of connection most likely held was fixed broadband via traditional phone line.

Reason For Switching Broadband – (Platform)

(Base: All respondents who have previously switched Broadband excl. where employer pays, n=585)

Q64. What was your and your household main reason for switching broadband supplier? For what other reasons did you switch?



Any Reason %

Traditional Phone (n=343) %	Fixed Fibre (n=40) %	Cable Network (n=120) %	Mobile Broadband (48*) %
59	53	55	40
33	40	44	44
31	27	30	22
20	18	22	32
21	20	13	17
13	6	35	3
7	13	6	9
11	9	19	8
13	15	14	18
11	-	3	24

* = Small base

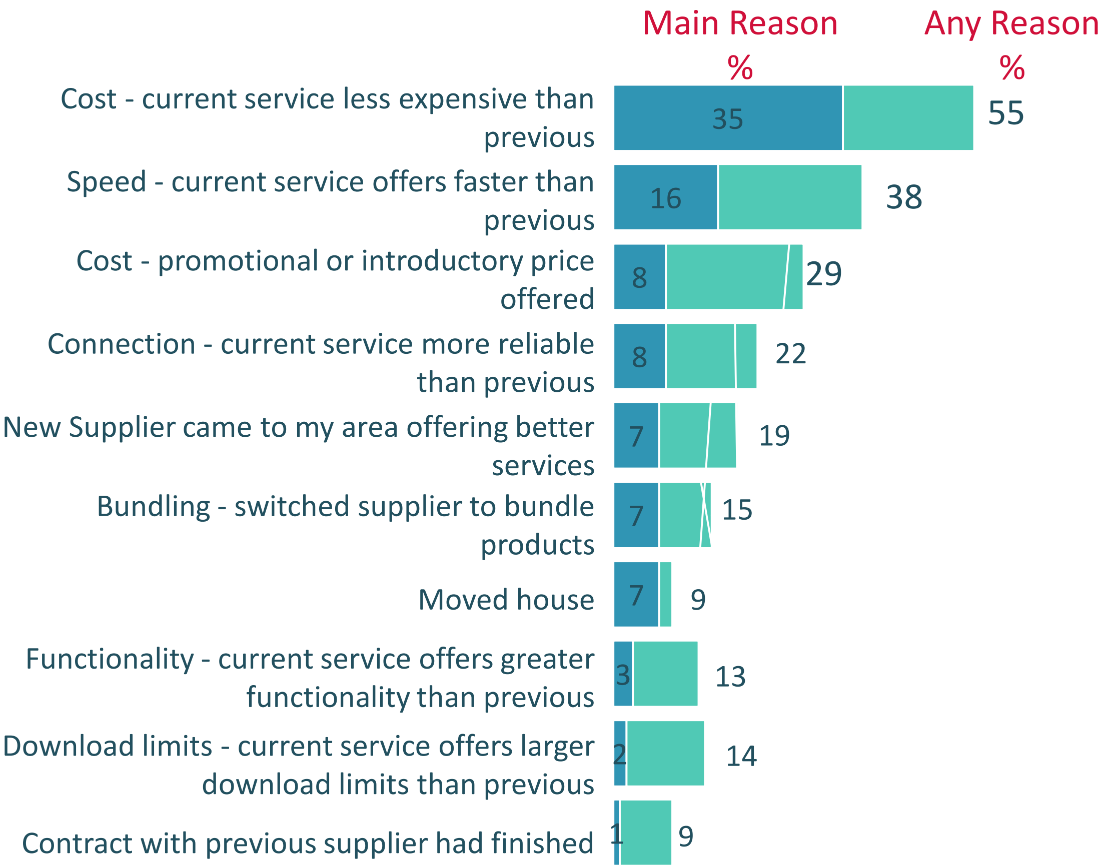
Small Base – Mobile Phone n =4, Satellite n = 2

Speed and Cost are the main reasons for switching regardless of which current platform the broadband subscriber is on.

Reason For Switching Broadband – II (Supplier)

(Base: All respondents who have previously switched Broadband excl. where employer pays, n=585)

Q64. What was your and your household main reason for switching broadband supplier? For what other reasons did you switch?



eircom (n=138) %	UPC (n=117) %	Vodafone (n=148) %	Sky (n=75) %
50	57	64	64
38	45	36	27
31	31	33	29
26	22	12	23
22	13	19	21
10	36	5	34
15	7	5	4
8	19	10	16
14	13	10	21
8	3	12	7

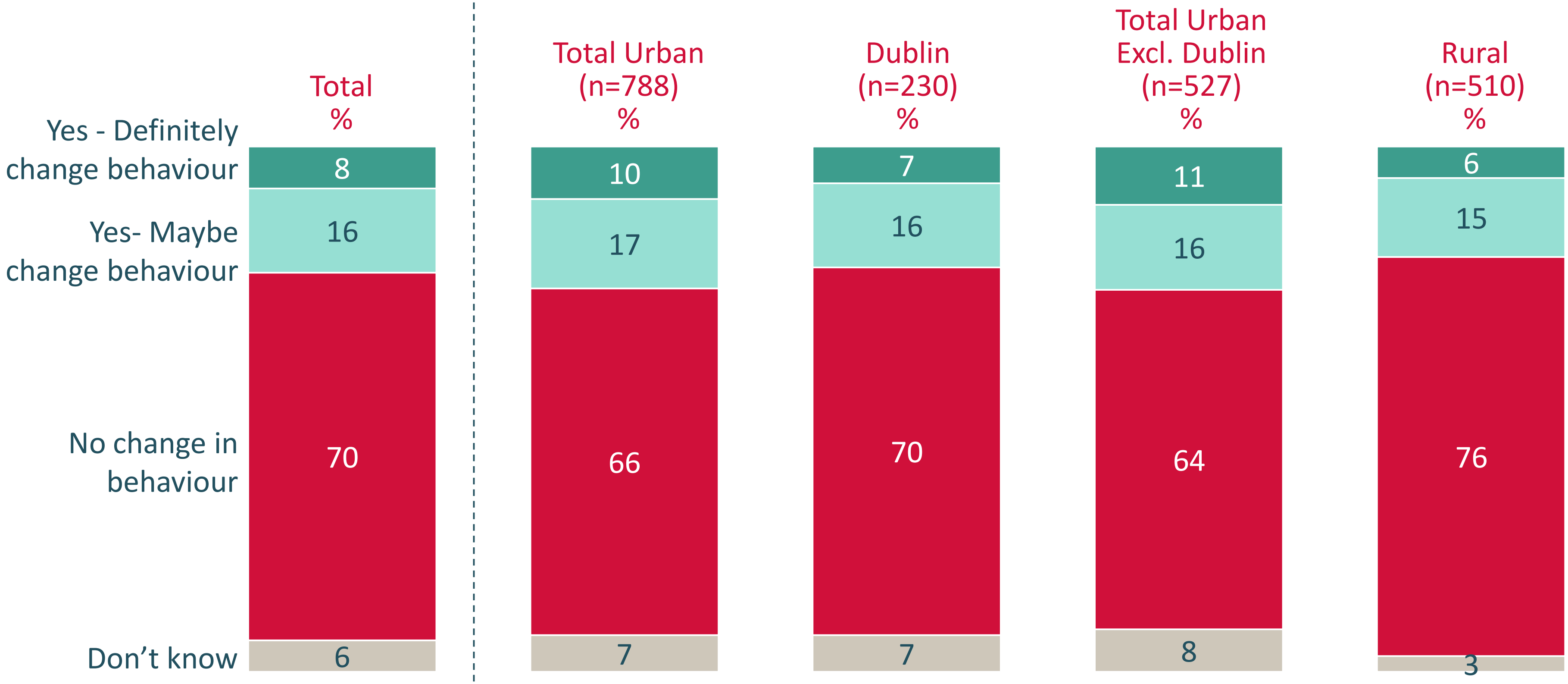
Speed as a reason for switching supplier registers higher for current UPC customers.

SSNIP (Bundle)

Likely Behaviour If Price Of Broadband In Bundle Increase By €2

(Base: All With Broadband Access in Bundle, n=976)

Q.51 Imagine if because of an increase in the price of broadband, the price of your overall bundle would increase by €2 per month/Imagine if the price of your broadband service were to increase by €2 per month. In response to these hypothetical price increases, do you believe that you and your household would change your actual purchasing behaviour with respect to your broadband service



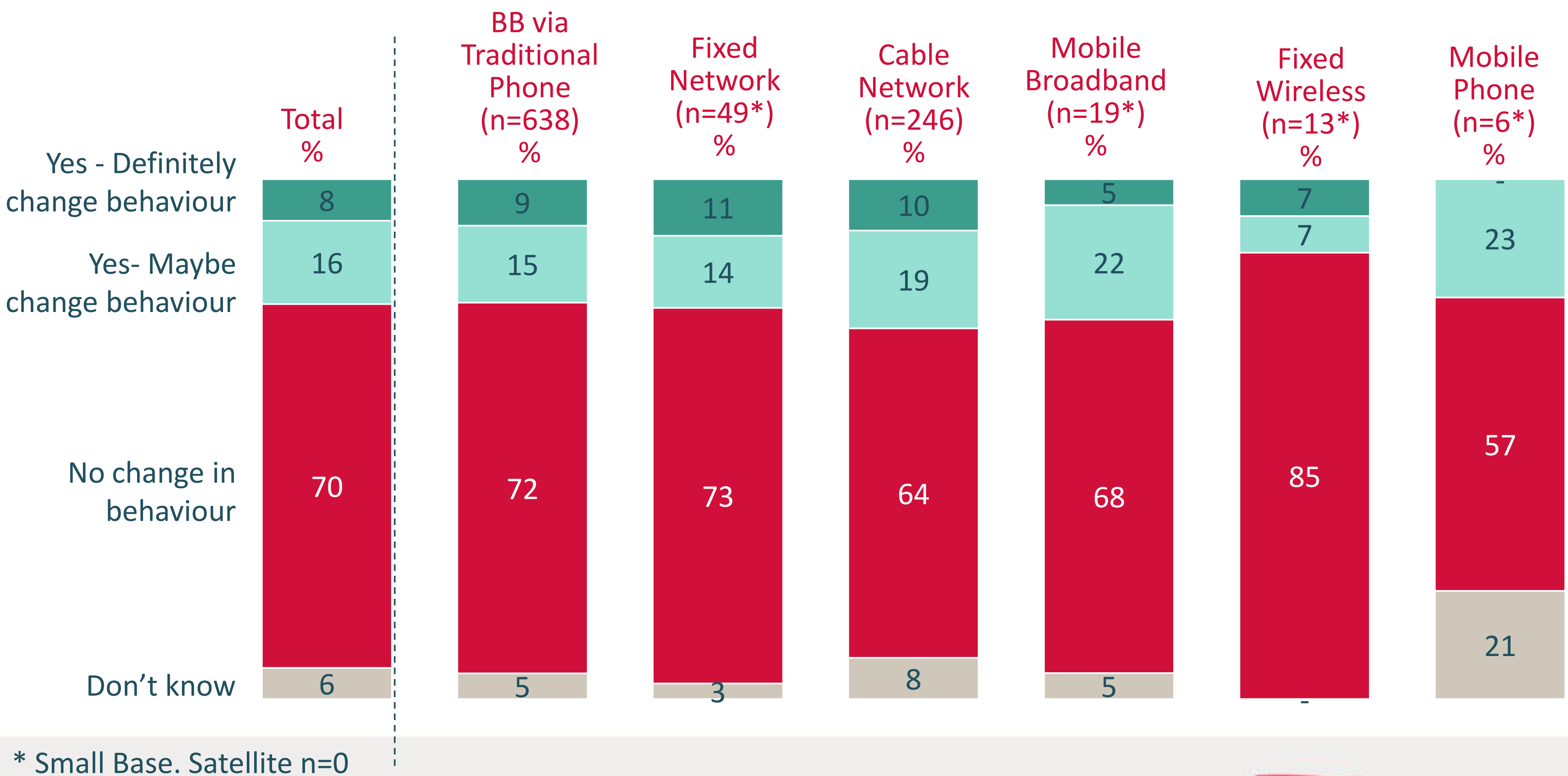
24% of those with broadband bundle state that they would change their behaviour if price of broadband in bundle increased by €2

REDC

Likely Behaviour If Price Of Broadband in Bundle Increase By €2

(Base: Base: All Respondents Who Have Broadband in Bundle, n=976)

Q.51/56 In response to these hypothetical price increases, do you believe that you (and your household) would change your actual purchasing behaviour with respect to your broadband service?



* Small Base. Satellite n=0

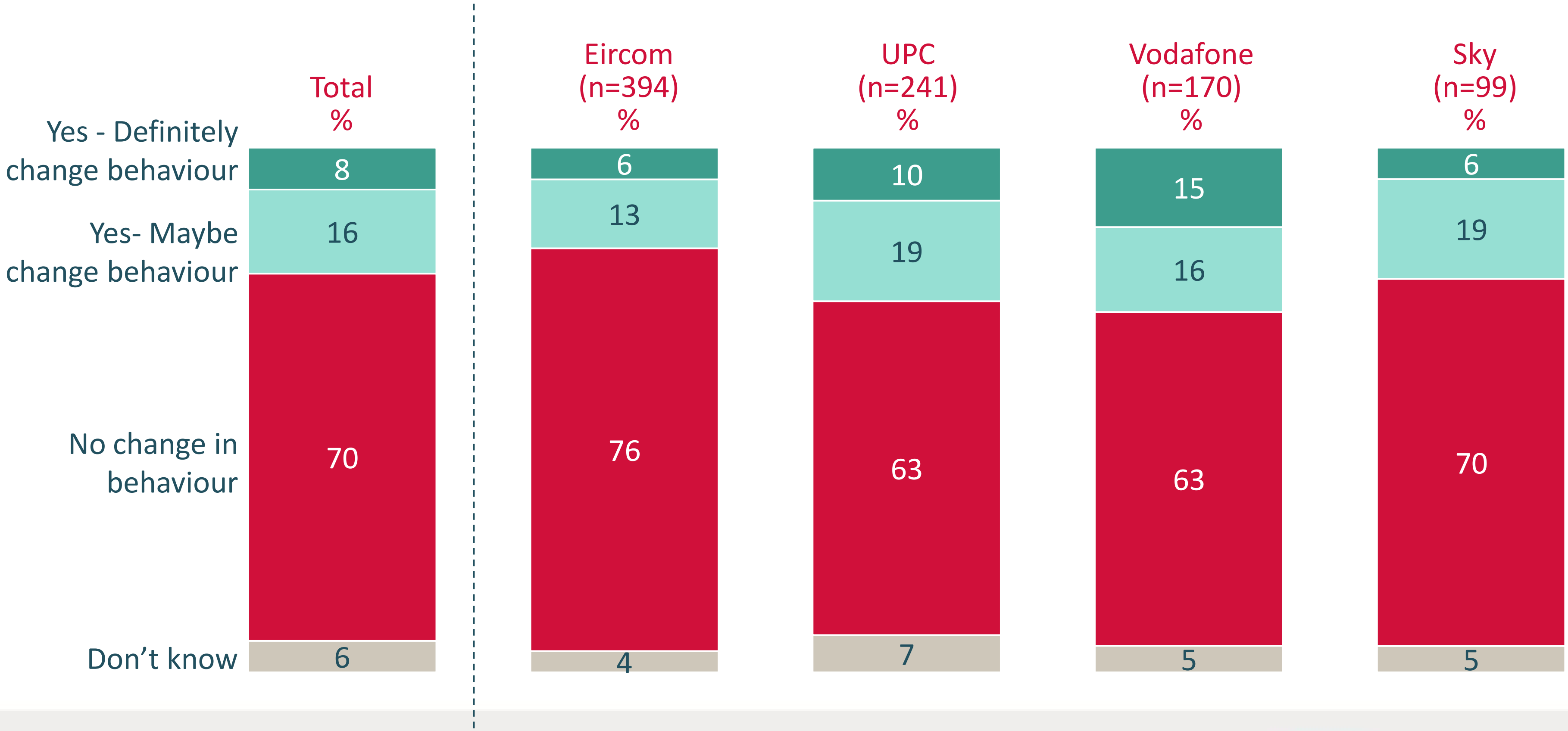
24% of those with broadband bundle state that they would change their behaviour if price of broadband in bundle increased by

REDC

Likely Behaviour If Price Of Broadband In Bundle Increase By €2

(Base: All With Broadband Access in Bundle, n=976)

Q.51 Imagine if because of an increase in the price of broadband, the price of your overall bundle would increase by €2 per month/Imagine if the price of your broadband service were to increase by €2 per month. In response to these hypothetical price increases, do you believe that you and your household would change your actual purchasing behaviour with respect to your broadband service

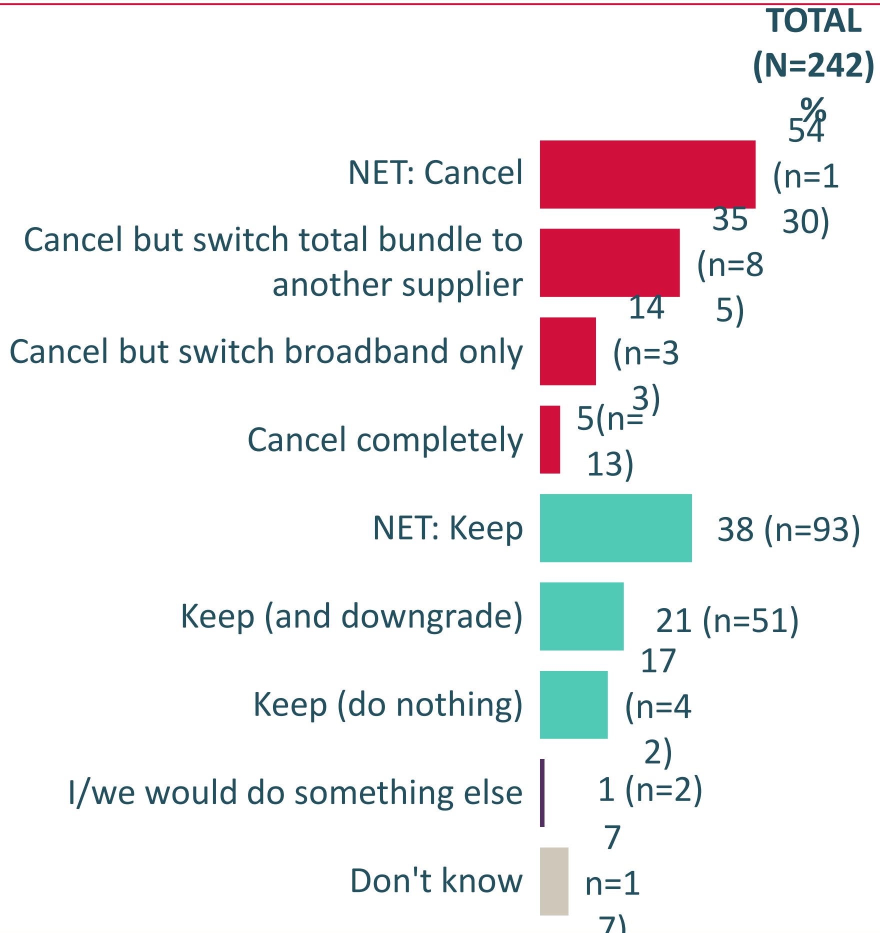


UPC and Vodafone more likely to change behaviour given increase in broadband cost within bundle

Behaviour Change If Price Broadband Increase By €2 in Bundle

(Base: All Respondents Who have Broadband Bundle who will change behaviour, n=242)

Q.52 Which of the following would best describe what you and your household would be most likely to do in response to this hypothetical €2 price increase of your broadband service?



Traditional Phone (n=150) %	Fibre Network (n=12*) %	Cable Network (n=70) %	Mobile broadband (n=5*) %
57	47	49	72
36	31	33	72
16	16	11	-
6	-	5	-
34	36	48	28
17	27	29	28
17	9	19	-
1	-	-	-
8	16	3	-

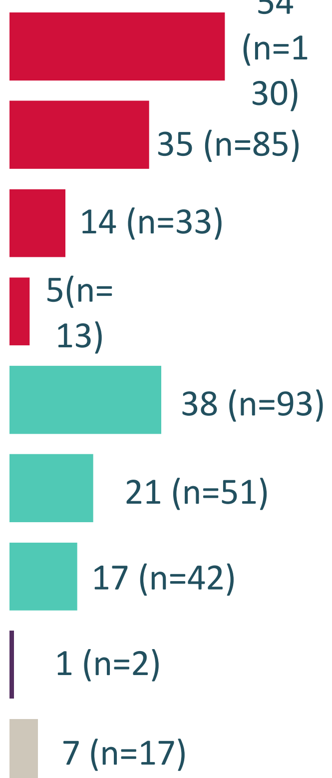
* Small Base. Fixed Wireless n=2,Mobile Phone n=1, Satellite n=0
( ) = actual number of people

54% are likely to cancel their subscription in one form or another given a broadband price rise of €2 within bundle

Behaviour Change If Price Broadband Increase By €2 in Bundle

(Base: All Respondents Who have Broadband Bundle who will change behaviour, n=242)

Q.52 Which of the following would best describe what you and your household would be most likely to do in response to this hypothetical €2 price increase of your broadband service?



	TOTAL (N=242) %	Total Urban (n=167) %	Total Dublin (n=53) %	Total Urban ex Dublin (n=114) %	Rural (n=75) %
NET: Cancel	54 (n=1 30)	55	49	57	52
Cancel but switch all	35 (n=85)	39	36	41	26
Cancel but switch broadband only	14 (n=33)	12	8	14	17
Cancel completely	5(n= 13)	3	5	3	9
NET: Keep	38 (n=93)	38	46	34	40
Keep (and downgrade)	21 (n=51)	23	29	20	17
Keep (do nothing)	17 (n=42)	15	17	14	23
I/we would do something else	1 (n=2)	-	-	-	2
Don't know	7 (n=17)	8	5	9	6

* Small Base. Fixed Wireless n=2,Mobile Phone n=1, Satellite n=0

( ) = actual number of people

54% are likely to cancel their subscription in one form or another given a broadband price rise of €2 within bundle

Behaviour Change If Price Broadband Increase By €2 in Bundle

(Base: All Respondents Who have Broadband Bundle who will change behaviour, n=242)

Q.52 Which of the following would best describe what you and your household would be most likely to do in response to this hypothetical €2 price increase of your broadband service?

	TOTAL (N=242) %	Eircom (n=77) %	UPC (n=70) %	Vodafone (n=53) %	Sky (n=25) %
NET: Cancel	54 (n=130)	59	49	59	46
Cancel but switch all	35 (n=85)	35	33	40	25
Cancel but switch broadband only	14 (n=33)	18	11	12	21
Cancel completely	5(n=13)	6	5	8	-
NET: Keep	38 (n=93)	32	48	26	54
Keep (and downgrade)	21 (n=51)	12	29	16	32
Keep (do nothing)	17 (n=42)	20	19	10	21
I/we would do something else	1 (n=2)	-	-	3	-
Don't know	7 (n=17)	8	3	11	-

* Small Base. Fixed Wireless n=2,Mobile Phone n=1, Satellite n=0

( ) = actual number of people

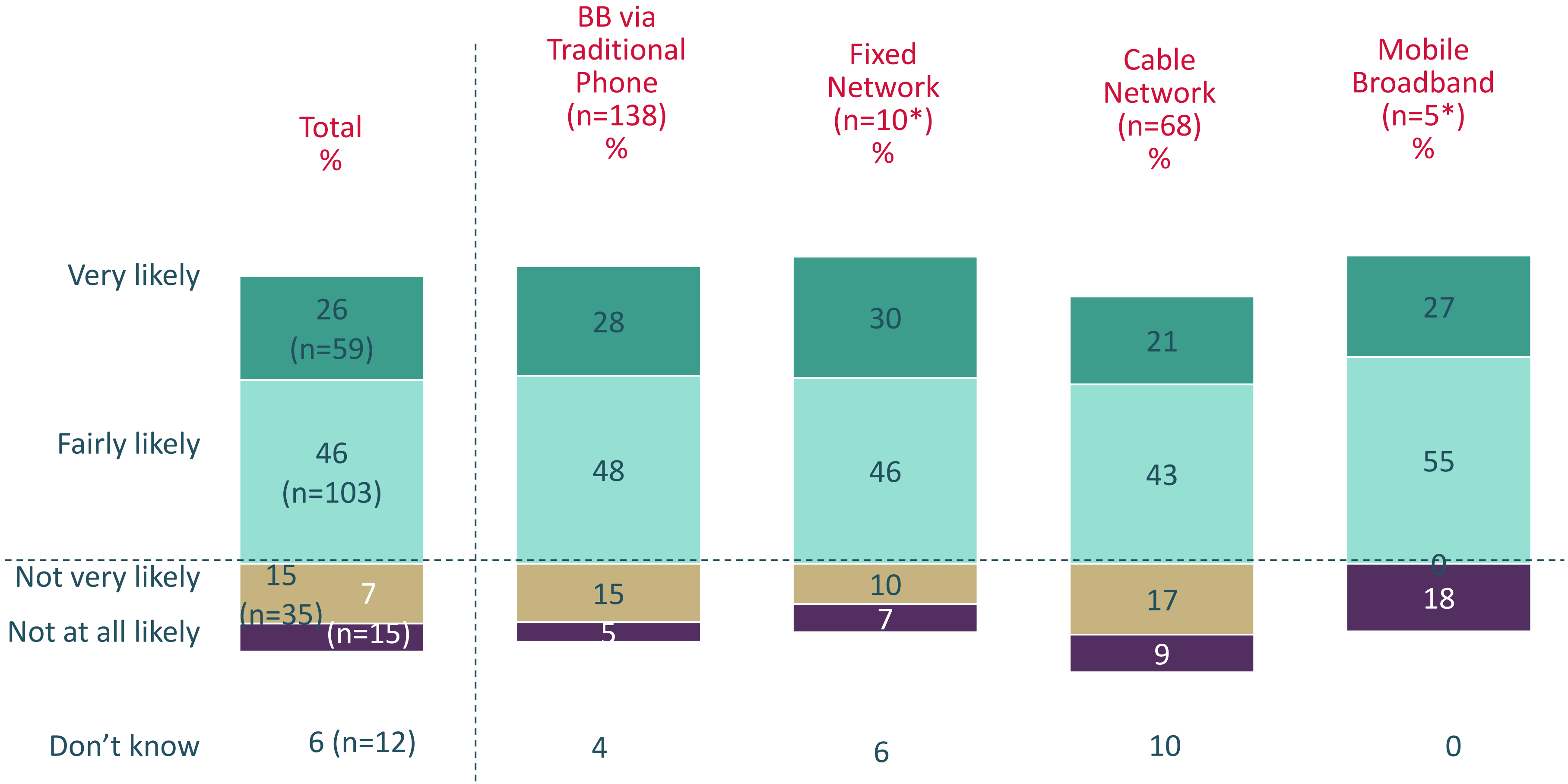
54% are likely to cancel their subscription in one form or another given a broadband price rise of €2 within bundle

REDC

Likelihood of Making Change In Behaviour (Broadband Bundle Owners)

(Base: Base: All Respondents Who Have Broadband Bundle And Would Change Behaviour (Excl DK), n=228)

Q.53 How likely are you (and your household) to change the behaviour you described…?



* Small Base. Fixed Wireless n=2,Mobile Phone n=1, Satellite n=0

( ) = actual number of people

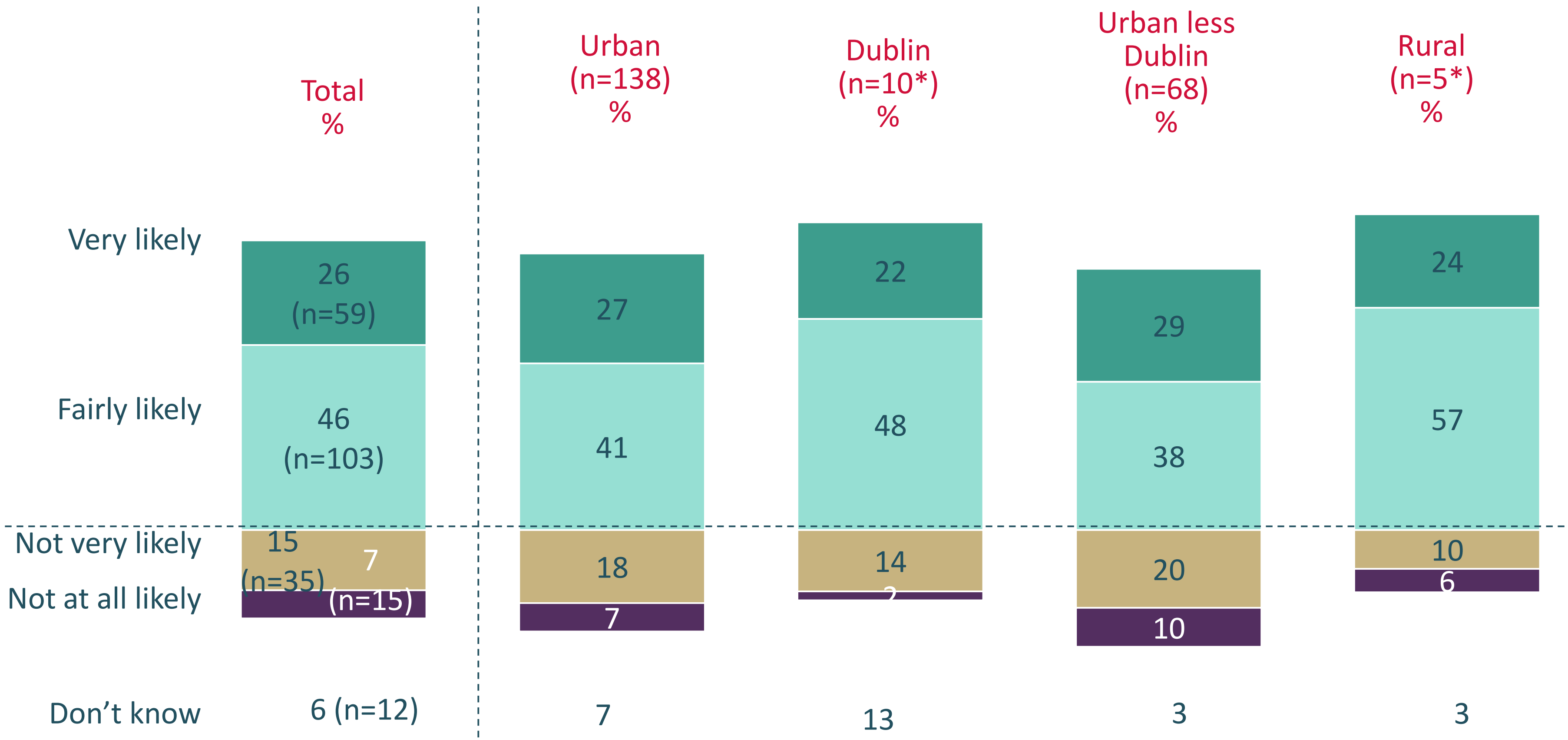
72% are likely to make the change in behaviour that they have indicated

REDC

Likelihood of Making Change In Behaviour (Broadband Bundle Owners)

(Base: Base: All Respondents Who Have Broadband Bundle And Would Change Behaviour (Excl DK), n=228)

Q.53 How likely are you (and your household) to change the behaviour you described...?



( ) = actual number of people

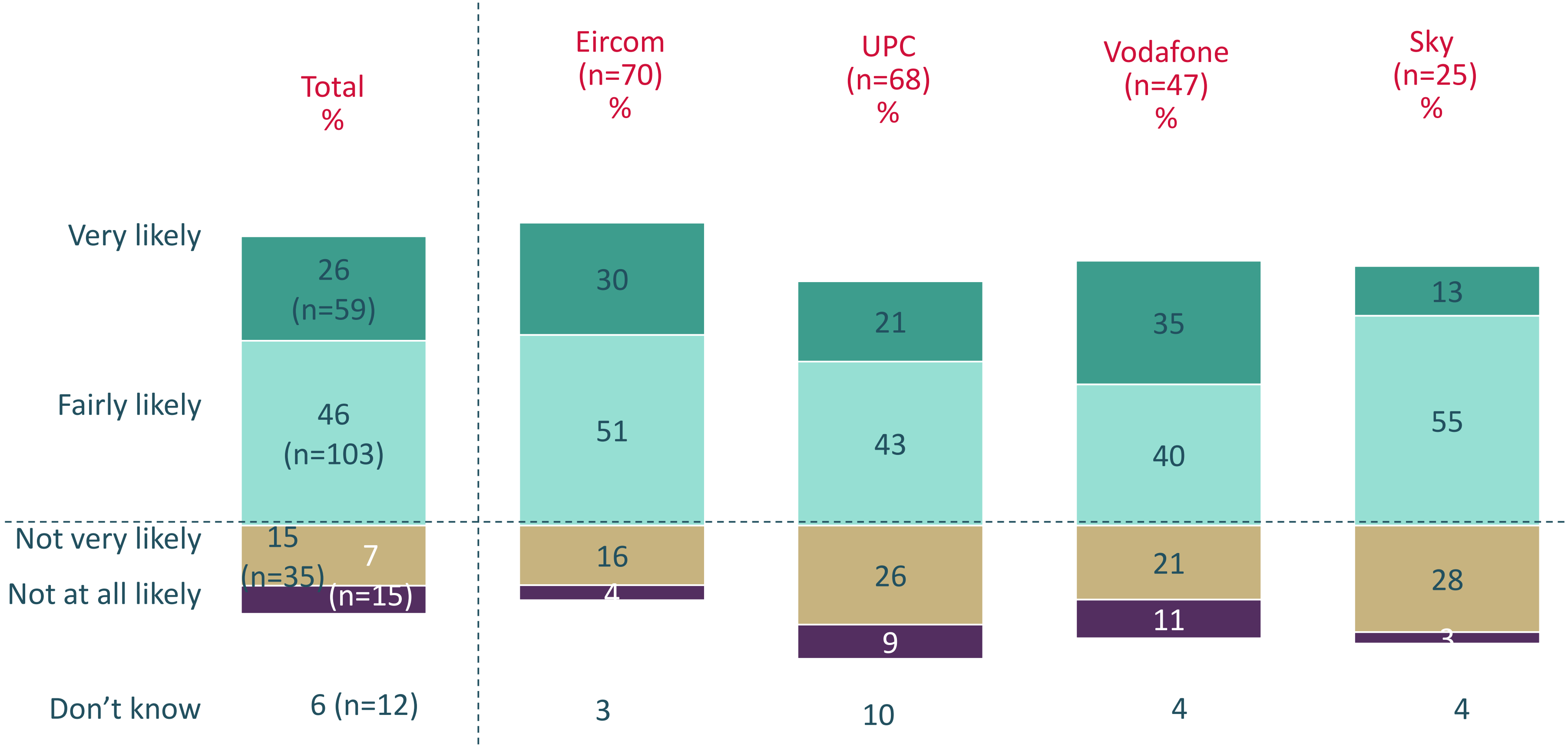
72% are likely to make the change in behaviour that they have indicated

REDC

Likelihood of Making Change In Behaviour (Broadband Bundle Owners)

(Base: Base: All Respondents Who Have Broadband Bundle And Would Change Behaviour (Excl DK), n=228)

Q.53 How likely are you (and your household) to change the behaviour you described...?



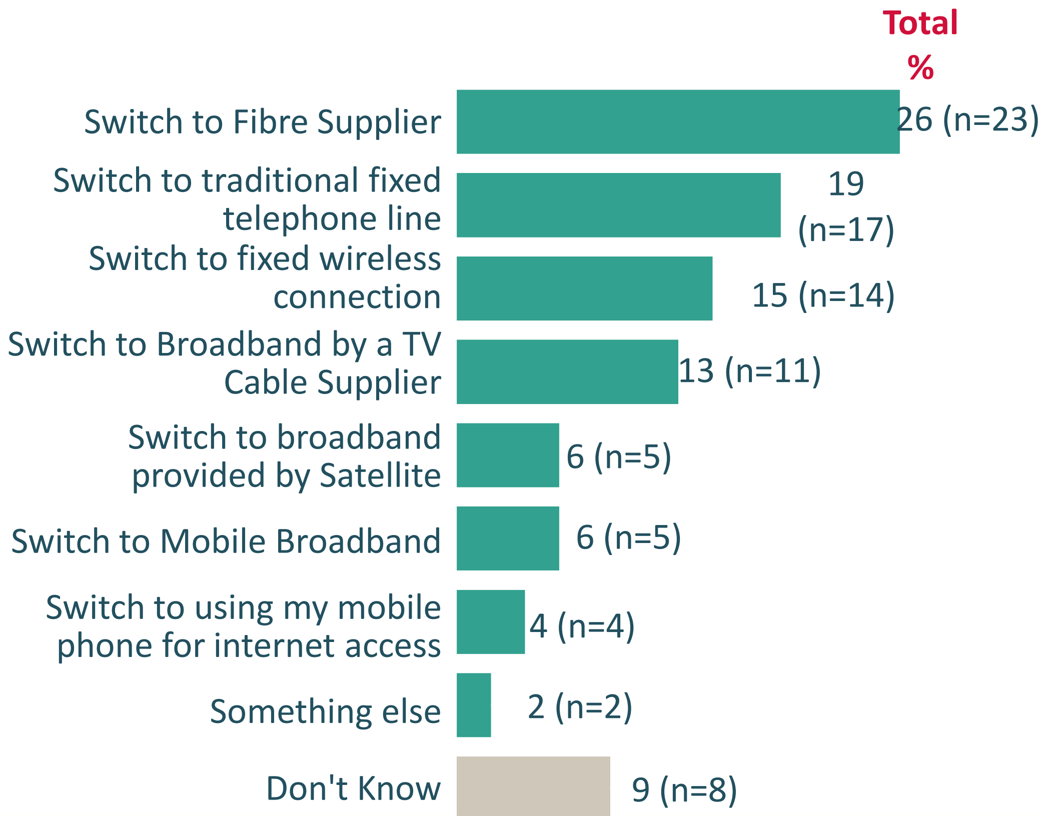
( ) = actual number of people

72% are likely to make the change in behaviour that they have indicated

Broadband Type Likely Switch To

(Base: All Respondents With Broadband Bundle and likely to switch n=89)

Q.54 Which type of broadband service would you and your household be most likely to switch to?



	Traditional Phone (n=60) %	Fibre Network (n=4*) %	Cable Network (n=22*) %	Mobile broadband (n=3*) %
	22	-	41	-
	11	49	36	23
	23	-	-	-
	14	51	5	-
	6	-	7	-
	8	-	-	-
	1	-	3	77
	4	-	-	-
	10	-	8	-

* Small Base. Fixed Wireless n=1,Mobile Phone n=0, Satellite n=0

( ) = actual number of people

Of those likely to switch given the price increased Fibre Broadband is the platform switchers are most likely to move to at 26%.

Broadband Type Likely Switch To

(Base: All Respondents With Broadband Bundle and likely to switch n=89)

Q.54 Which type of broadband service would you and your household be most likely to switch to?

	Total %	Urban (n=63) %	Dublin (n=21*) %	Urban less Dublin (n=42*) %	Rural (n=26*) %
Switch to Fibre Supplier	26 (n=23)	30	39	25	16
Switch to traditional fixed telephone line	19 (n=17)	22	34	17	11
Switch to fixed wireless connection	15 (n=14)	10	-	15	27
Switch to Broadband by a TV Cable Supplier	13 (n=11)	11	11	11	18
Switch to broadband provided by Satellite	6 (n=5)	6	4	7	6
Switch to Mobile Broadband	6 (n=5)	3	3	3	12
Switch to using my mobile phone for internet access	4 (n=4)	6	-	9	-
Something else	2 (n=2)	3	-	5	-
Don't Know	9 (n=8)	8	9	8	10

* Small Base

( ) = actual number of people

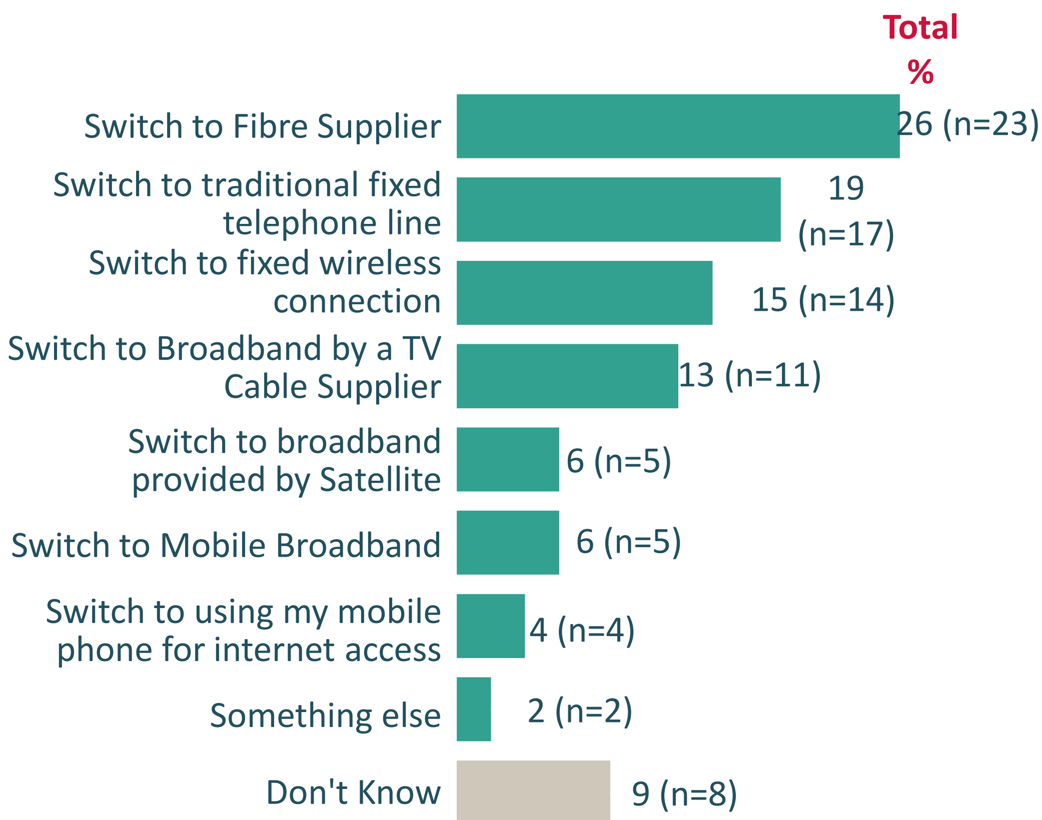
Of those likely to switch given the price increased Fibre Broadband is the platform switchers are most likely to move to at 26%.

REDC

Broadband Type Likely Switch To

(Base: All Respondents With Broadband Bundle and likely to switch n=89)

Q.54 Which type of broadband service would you and your household be most likely to switch to?



	Eircom (n=31*) %	UPC (n=22*) %	Vodafone (n=24*) %	Sky (n=6*) %
Switch to Fibre Supplier	26	41	18	17
Switch to traditional fixed telephone line	12	36	4	43
Switch to fixed wireless connection	8	-	42	13
Switch to Broadband by a TV Cable Supplier	26	5	10	-
Switch to broadband provided by Satellite	4	7	10	-
Switch to Mobile Broadband	8	-	3	28
Switch to using my mobile phone for internet access	2	3	-	-
Something else	3	-	4	-
Don't Know	9	8	9	-

* Small Base
( ) = actual number of people

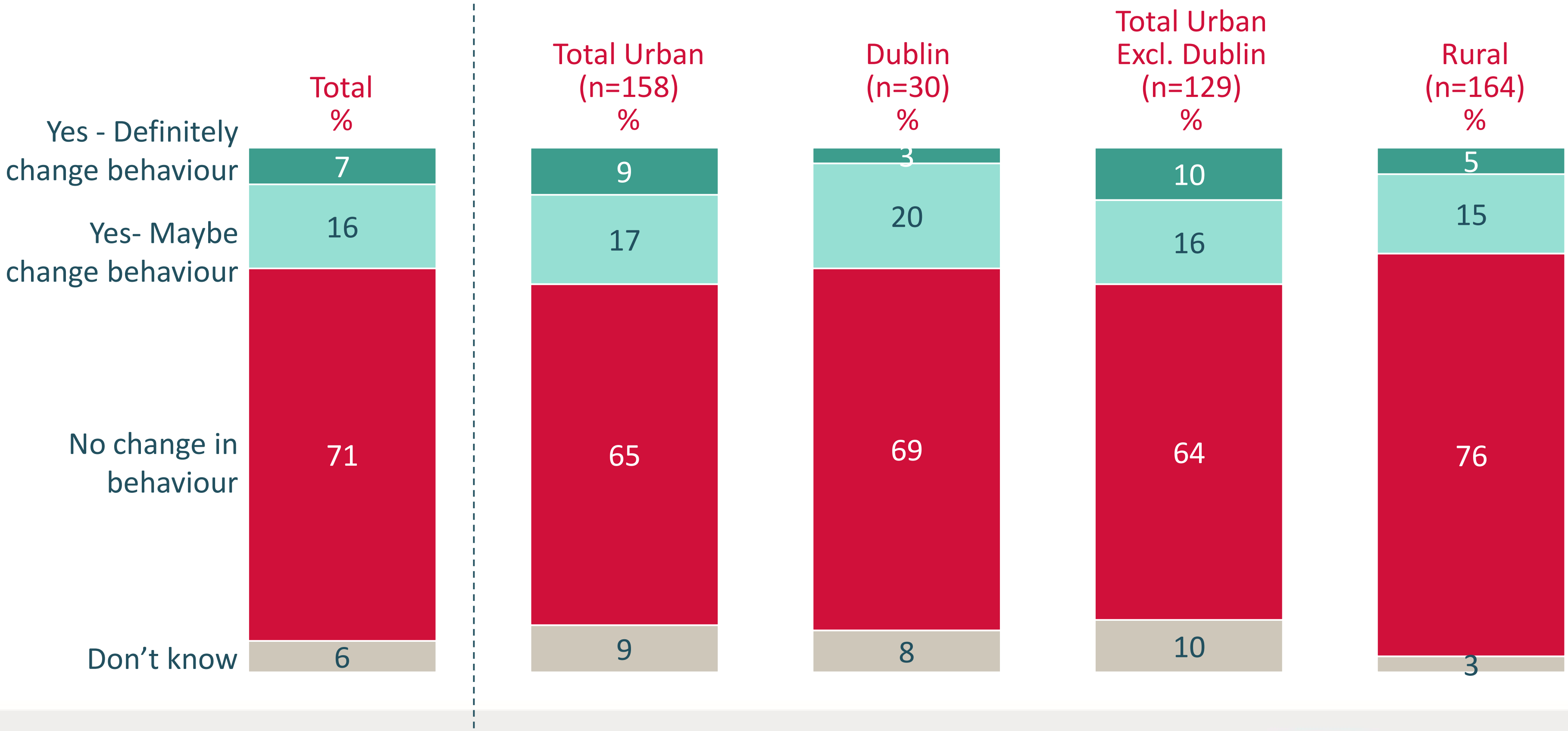
Of those likely to switch given the price increased Fibre Broadband is the platform switchers are most likely to move to at 26%.

SSNIP (Non-Bundle)

Likely Behaviour If Price Of Broadband Increase By €2 (Non Bundle)

(Base: All With Broadband Access in non Bundle, n=322)

Q.56 Imagine if because of an increase in the price of broadband the service were to increase by €2 per month. In response to these hypothetical price increases, do you believe that you and your household would change your actual purchasing behaviour with respect to your broadband service

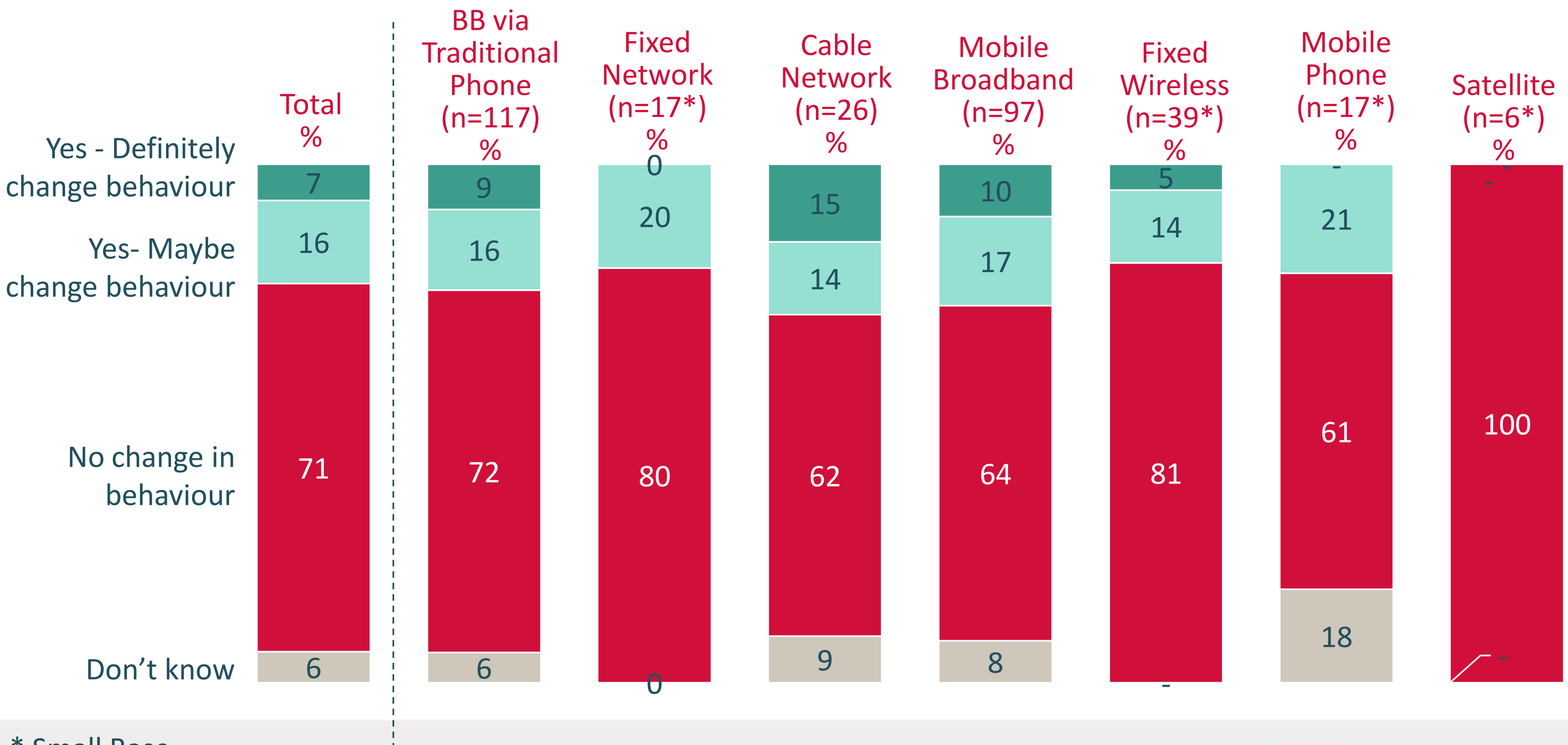


23% of those with broadband non bundle state that they would change their behaviour if price of broadband increased by €2

Likely Behaviour If Price Of Broadband Increased By €2

(Base: All With Broadband Access in non Bundle, n=322)

Q.56 Imagine if because of an increase in the price of broadband the service were to increase by €2 per month. In response to these hypothetical price increases, do you believe that you and your household would change your actual purchasing behaviour with respect to your broadband service



* Small Base

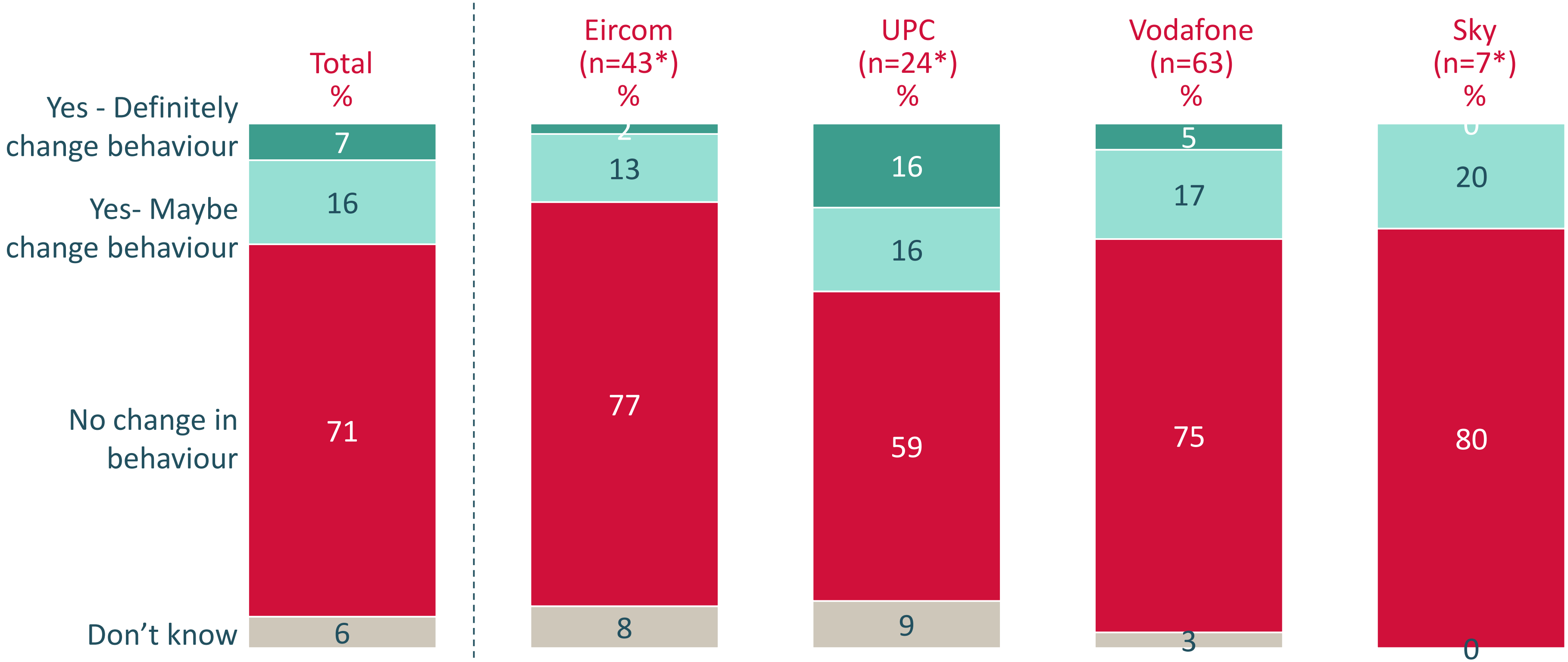
23% of those with broadband non bundle state that they would change their behaviour if price of broadband increased by €2

REDC

Likely Behaviour If Price Of Broadband Increase By €2 (Non Bundle)

(Base: All With Broadband Access in non Bundle, n=322)

Q.56 Imagine if because of an increase in the price of broadband the service were to increase by €2 per month. In response to these hypothetical price increases, do you believe that you and your household would change your actual purchasing behaviour with respect to your broadband service



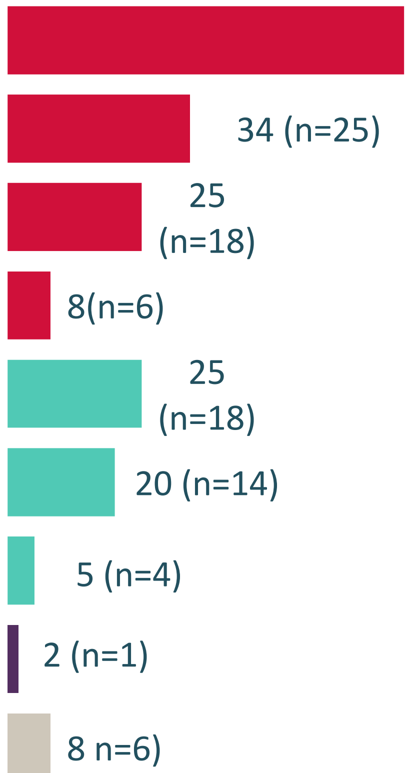
* Small base

23% of those with broadband non bundle state that they would change their behaviour if price of broadband increased by €2. Higher for UPC customers.

Behaviour Change If Price Broadband Increase By €2

(Base: All Respondents Who have Broadband non Bundle who will change behaviour, n=74)

Q.57 Which of the following would best describe what you and your household would be most likely to do in response to this hypothetical €2 price increase of your broadband service?



	TOTAL (N=74) %	Traditional Phone (n=25) %	Cable Network (n=8*) %	Mobile Broadband (n=26) %	Fixed Wireless (n=7*) %
NET: Cancel	74 (n=55)	67	56	68	82
Cancel but switch BB bundle	34 (n=25)	46	13	21	54
Cancel – switch all	25 (n=18)	18	34	34	14
Cancel - completely	8(n=6)	3	10	13	14
NET: Keep	25 (n=18)	33	35	24	-
Keep (and downgrade)	20 (n=14)	33	17	18	-
Keep (do nothing)	5 (n=4)	-	19	5	-
I/we would do something else	2 (n=1)	-	-	-	19
Don't know	8 n=6)	-	9	9	-

* Small Base. Fibre n=3,Mobile Phone n=4, Satellite n=0

( ) = actual number of people

74% are likely to cancel their subscription in one form or another given a broadband price rise of €2 within bundle

REDC

Behaviour Change If Price Broadband Increase By €2

(Base: All Respondents Who have Broadband non Bundle who will change behaviour, n=74)

Q.57 Which of the following would best describe what you and your household would be most likely to do in response to this hypothetical €2 price increase of your broadband service?

	TOTAL (N=74) %	Urban (n=40*) %	Dublin (n=7*) %	Urban less Dublin (n=33*) %	Rural (n=34*) %
NET: Cancel	74 (n=55)	58	90	52	76
Cancel but switch BB bundle	34 (n=25)	32	46	29	35
Cancel – switch all	25 (n=18)	22	45	17	28
Cancel - completely	8(n=6)	4	-	5	12
NET: Keep	25 (n=18)	34	-	40	13
Keep (and downgrade)	20 (n=14)	28	-	34	9
Keep (do nothing)	5 (n=4)	5	-	6	4
I/we would do something else	2 (n=1)	-	-	-	4
Don't know	8 n=6)	8	10	8	7

( ) = actual number of people

74% are likely to cancel their subscription in one form or another given a broadband price rise of €2 within bundle

Behaviour Change If Price Broadband Increase By €2

(Base: All Respondents Who have Broadband non Bundle who will change behaviour, n=74)

Q.57 Which of the following would best describe what you and your household would be most likely to do in response to this hypothetical €2 price increase of your broadband service?

	TOTAL (N=74) %	Eircom (n=6*) %	UPC (n=8*) %	Vodafone (n=14*) %
NET: Cancel	74 (n=55)	52	66	67
Cancel but switch BB bundle	34 (n=25)	40	13	50
Cancel – switch all	25 (n=18)	12	34	5
Cancel - completely	8(n=6)	-	10	6
NET: Keep	25 (n=18)	48	35	28
Keep (and downgrade)	20 (n=14)	48	17	28
Keep (do nothing)	5 (n=4)	-	19	-
I/we would do something else	2 (n=1)	-	-	-
Don't know	8 n=6)	-	9	10

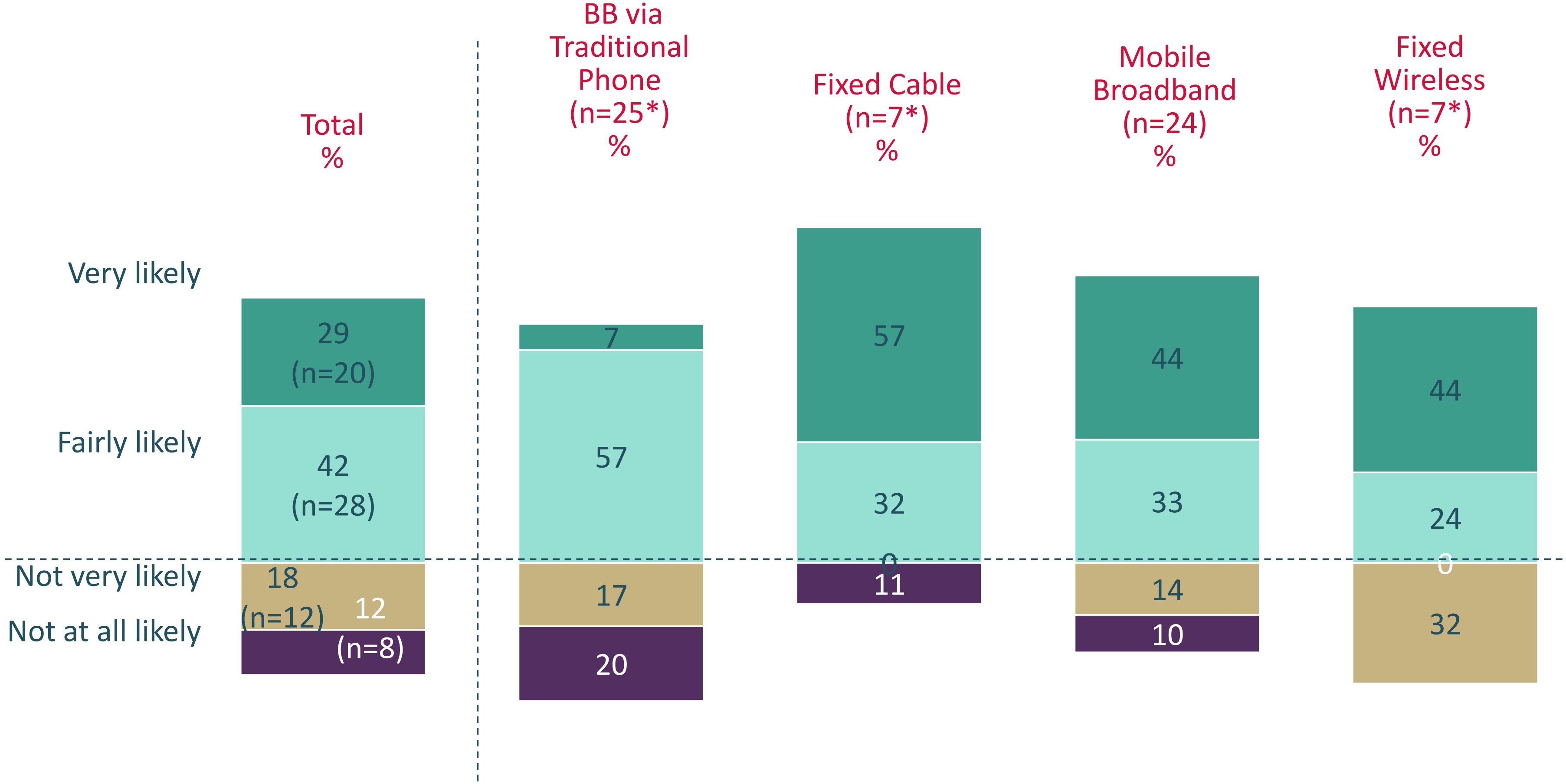
( ) = actual number of people

74% are likely to cancel their subscription in one form or another given a broadband price rise of €2 within bundle

Likelihood of Making Change In Behaviour (Broadband Bundle Owners)

(Base: Base: All Respondents Who Have Broadband Non Bundle And Would Change Behaviour (Excl DK), n=68)

Q.58 How likely are you (and your household) to change the behaviour you described...?



* Small Base. Fixed Fibre n=2,Mobile Phone n=2, Satellite n=0

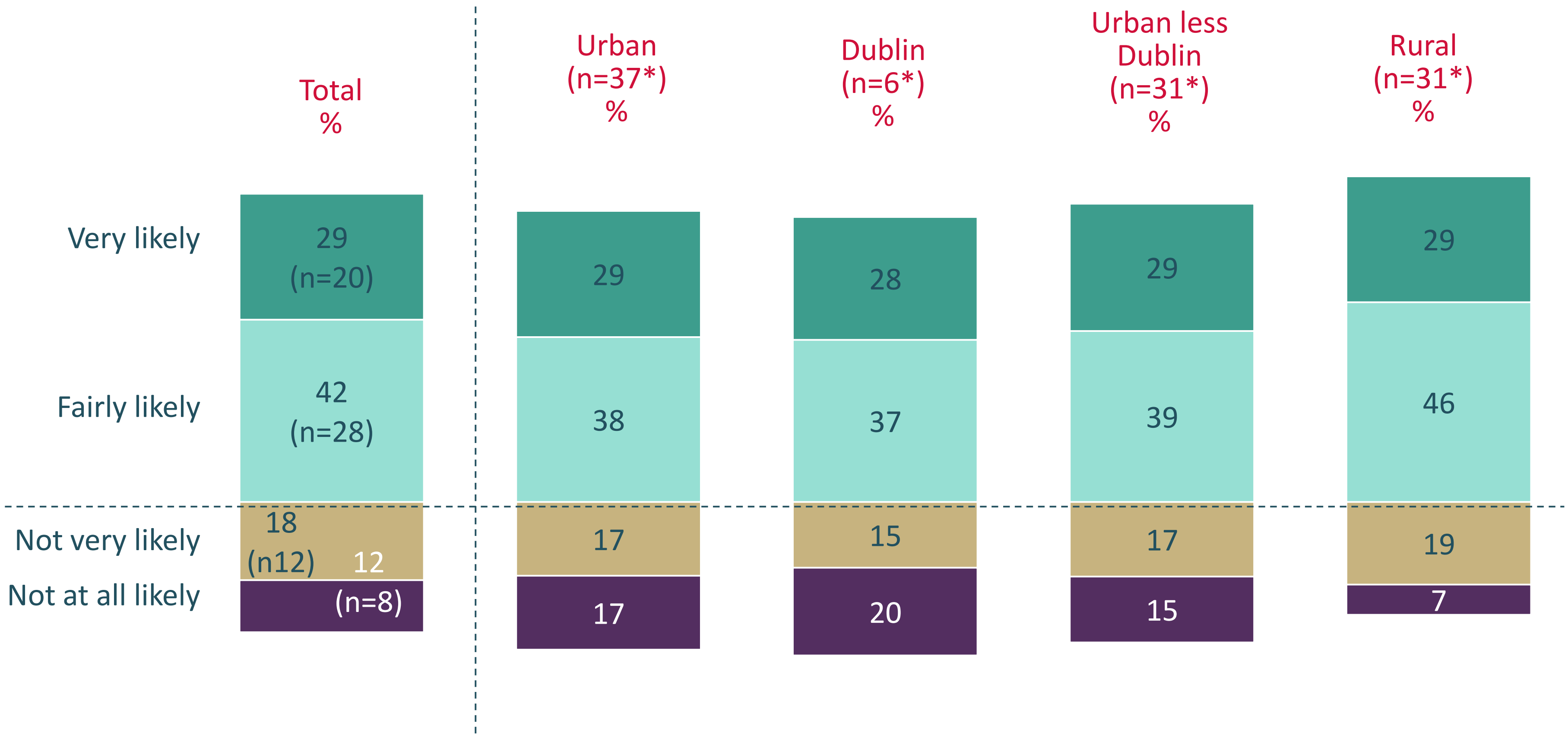
( ) = actual number of people

71% are make the change in behaviour that they have indicated

Likelihood of Making Change In Behaviour (NonBundle Owners)

(Base: Base: All Respondents Who Have Broadband Bundle And Would Change Behaviour (Excl DK), n=68)

Q.53 How likely are you (and your household) to change the behaviour you described...?



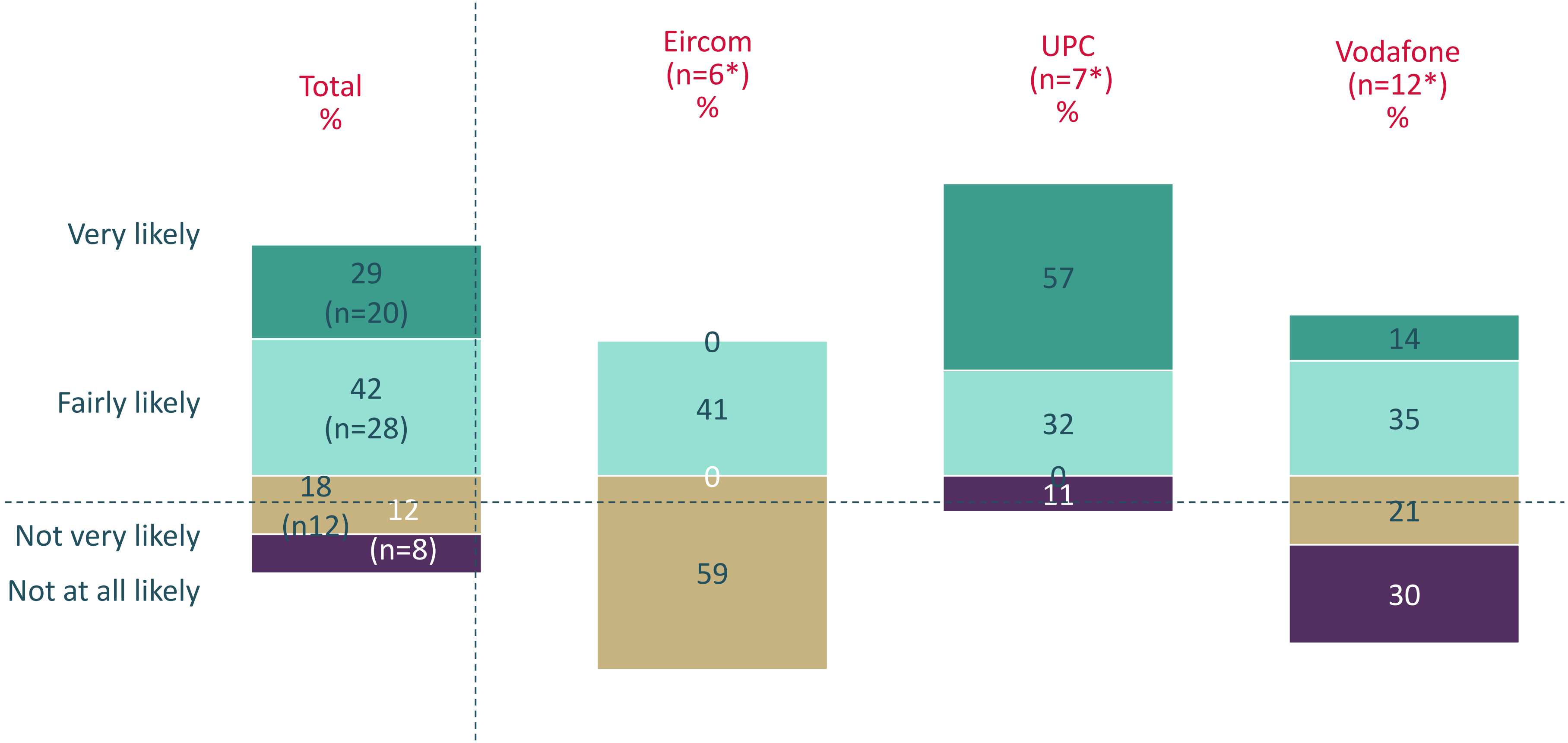
* Small Base
( ) = actual number of people

71% are make the change in behaviour that they have indicated

Likelihood of Making Change In Behaviour (NonBundle Owners)

(Base: Base: All Respondents Who Have Broadband Bundle And Would Change Behaviour (Excl DK), n=68)

Q.53 How likely are you (and your household) to change the behaviour you described...?



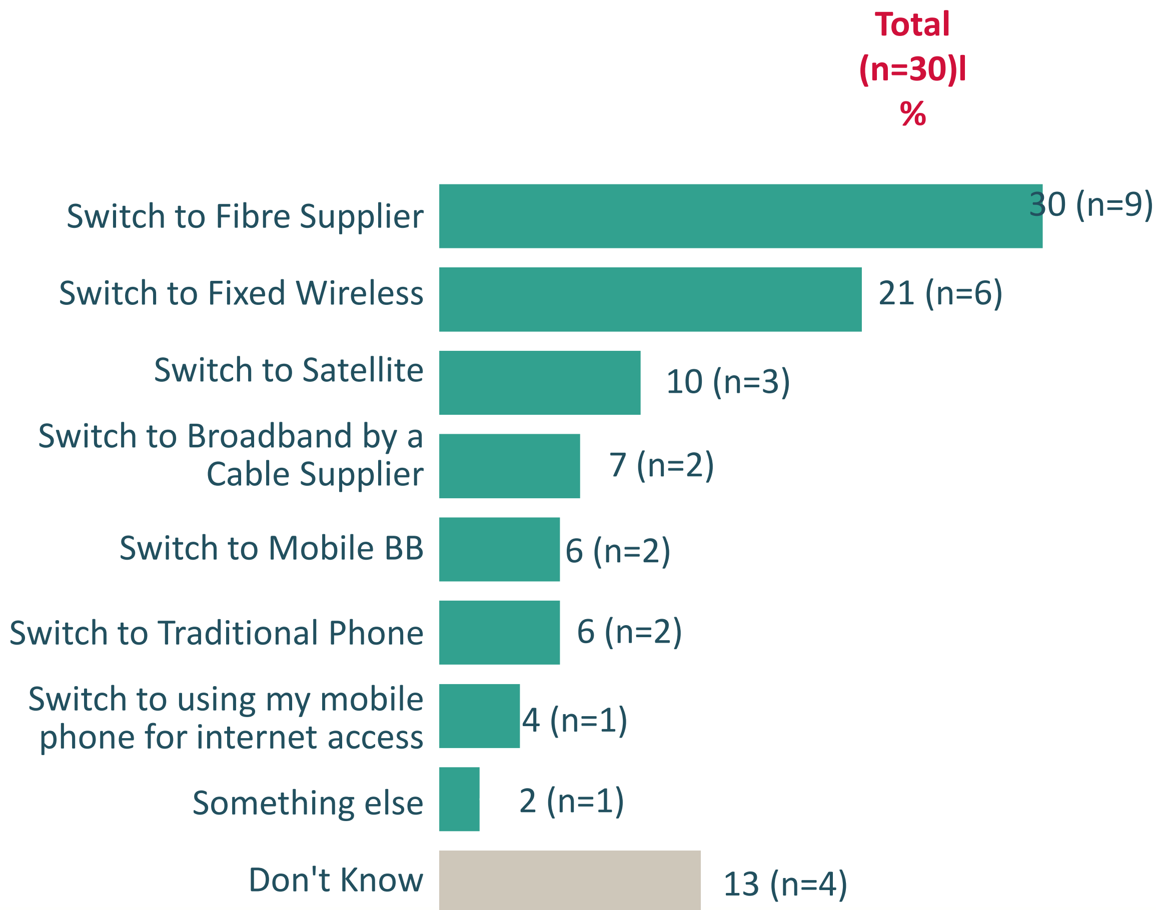
* Small Base
( ) = actual number of people

71% are make the change in behaviour that they have indicated.

Broadband Type Likely Switch To

(Base: All Respondents With Broadband Bundle and likely to switch n=30*)

Q.59 Which type of broadband service would you and your household be most likely to switch to?



	BB Via Traditional Phone (n=11) %	Mobile Broadband (n=11*) %
Switch to Fibre Supplier	25	31
Switch to Fixed Wireless	33	25
Switch to Satellite	12	16
Switch to Broadband by a Cable Supplier	20	-
Switch to Mobile BB	-	-
Switch to Traditional Phone	10	-
Switch to using my mobile phone for internet access	-	11
Something else	-	-
Don't Know	-	18

* Small Base Entire Slide - Caution

( ) = actual number of people

Broadband type most likely to switch to is Fibre Broadband

Key Survey Findings

- Broadband access claimed in 87% of Irish Households – higher in urban areas. For those without access main reason stated for not having broadband is that they don't want it.
- Most common access type is fixed broadband via phone line but within Dublin cable access is most popular. 72% of rural Ireland connect to broadband via a fixed phone line.
- Fixed Broadband via Phone line is most likely provided by eircom at 52% with Vodafone at 28% market share. Average speed of this service is 33Mbps. For those bundling with this service average bundle spend per month is €54. 64% are currently within contract and 45% have ever switched broadband supplier.
- Fibre Network is accessed by 6% of the population as a primary means of broadband access. Main supplier of Fibre is Eircom at 74% market share. Average max download speed of service is 70Mbps. Average bundle spend is €50 per month. 82% are in contract with current broadband supplier. 60% have previously ever switched broadband supplier.
- Cable Network is accessed by 26% of the population but is significantly higher in Dublin at 54%. Main provider of this service is UPC with 95% market share. Average max download speed experienced is 83Mbps. Average bundle spend is €72 per month. 43% are currently in contract and 44% have previously switched broadband supplier.
- Mobile Broadband is accessed by 8% of the population as a main means of broadband access. Higher in rural Ireland at 12%. Main provider of mobile broadband is Three with 46% market share. Average speed of service is 16Mpbs. 32% are in contract and ever switching is lower than average at 41%.
- Other means of broadband access not widely used are Fixed Wireless access 4% and 3G/4G mobile phone (2%) and Satellite with less than 1%. Throughout the presentation these access types have been shown however the base sizes are too low to draw reliable insight from.

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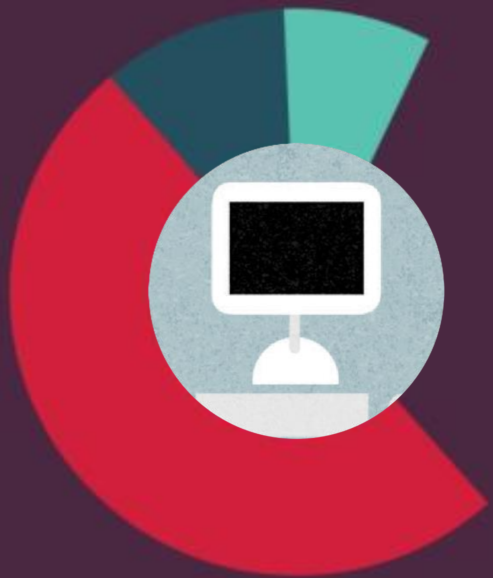
THANK YOU



ComReg: Market Analysis – Business Market

Commission for Communications Regulation

REDC

Background and Objectives

/ The Commission for Communications Regulation (ComReg) wish to conduct a Market Analysis survey of the business broadband and leased lines in Ireland

/ The purpose of this research is to assess the following:

- Access to broadband and leased lines
- Understand modes of broadband and leased line access
- Establish incidence of broadband and leased lines bundling and switching among Irish businesses

/ Specifically the research examines access to broadband and leased lines, and seeks to determine the impact different access modes have on Irish business .

Methodology

/ 1,100 interviews were conducted by telephone among a nationally representative sample of businesses operating in Ireland

/ Interviews were quota controlled by industry sector/company size and region in order to accurately represent the correct profile of Irish business.

/ Boost interviews were conducted in larger company sizes and weighted back to known proportions

Company Size	Number of Interviews Conducted	Weighted Representative Sample
Micro (1-10 Employees)	705	913
Small (11-50 Employees)	195	154
Medium (50-250 Employees)	100	22
Large (250+ Employees)	100	11

/ All interviews were conducted via CATI telephone interviewing

/ Fieldwork was conducted between 10th November – 5th December 2014.

/ Interviews were conducted with the person responsible for telecommunication decision making within each company. In larger companies this was likely to be a specialised person such as an IT manager and for smaller companies this person was likely to be the owner/manager.

Note on Sample Size

- ComReg have requested a complete analysis of broadband and leased lines among businesses in Ireland. Some access modes are not commonly used and therefore have very small bases sizes. In the interest of completeness these access modes are presented herein. However due to small sample sizes some of the more granular data reported is not statistically significant. Therefore care should be taken when interpreting this information.

Access Type Primary Broadband Mode	Unweighted Base Size
Fixed Landline	566
Fibre Network	125
Cable Network	59
3G/4G Mobile Broadband	57
Satellite Broadband	36
Fixed Wireless	25
Other Broadband	7

Access Type Primary Leased Line Mode	Unweighted Base Size
Other incl.Wavelength Connectivity	58
Digital Leased Line	51
Ethernet Leased Line	46
Analogue Leased Line	15
Don't Know	7

- On filtered questions the base size described above will fall further and analysis within each access type will not always be possible.
- Base sizes within leased line platforms are shown unweighted throughout the presentation.

Presentation Structure

- Sample Profile (Total Sample)
- Connection details (Total Sample)

Broadband Users

- Suppliers and Usage
- Service Level Agreement
- Speed of Connection
- Contracts
- Bundling
- Switching
- SSNIP

Leased Line Users

- Suppliers and Usage
- Service Level Agreement
- Speed of Connection
- Contracts
- Bundling
- Switching
- SSNIP

- Key Findings

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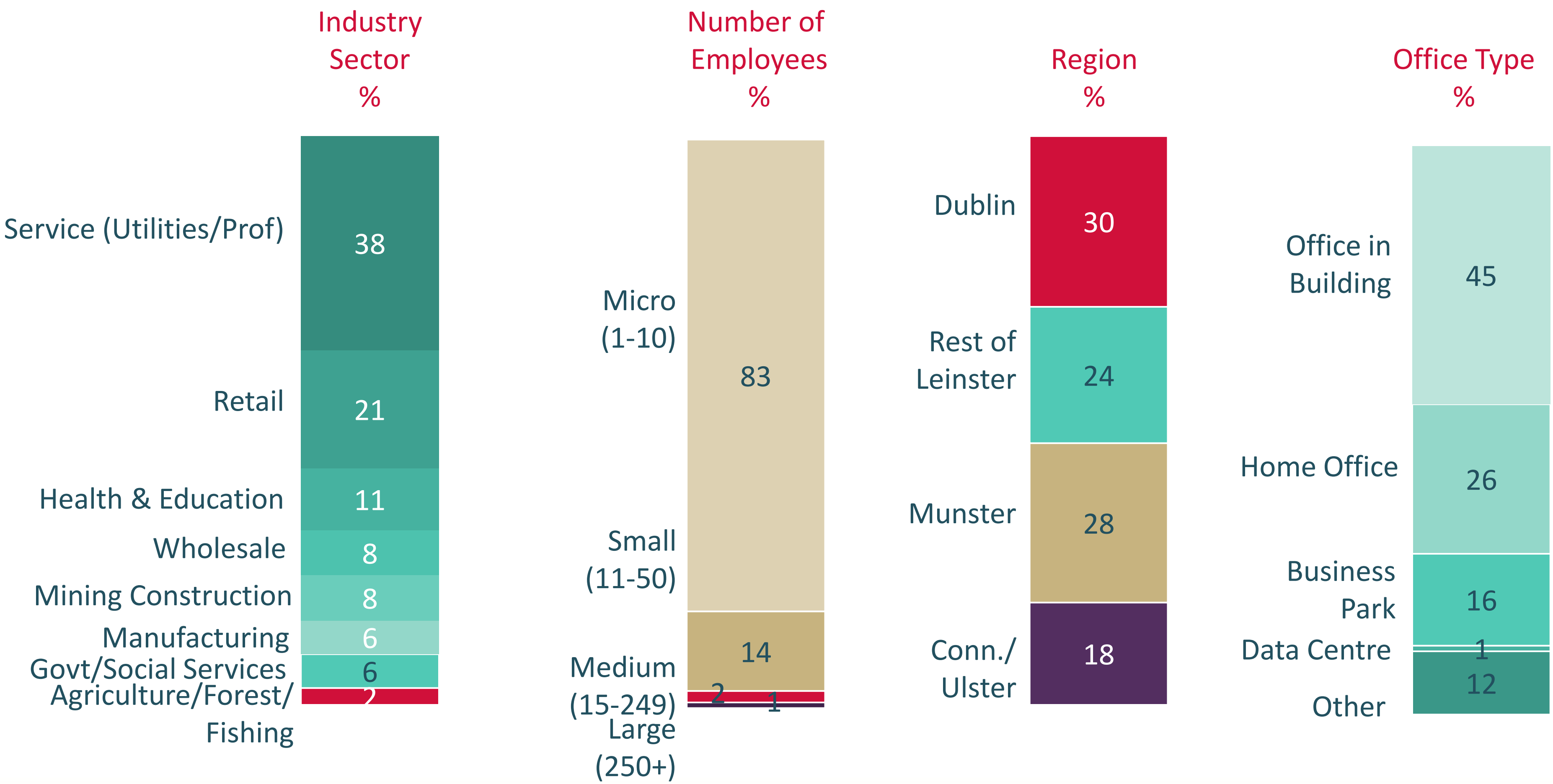
Sample Profile

Sample Profile

(Base: All Business Decision Makers – 1,100)



Sample was weighted to represent the total businesses in Ireland by industry sector, size and region.

Connection Details

Data Connectivity: What the Respondents were told

(Base: All Business Decision Makers - 1,100)

There are different ways that data connectivity services can be provided to a business, namely through broadband and leased line access. I will briefly explain the difference between these before asking what services you have in your business.

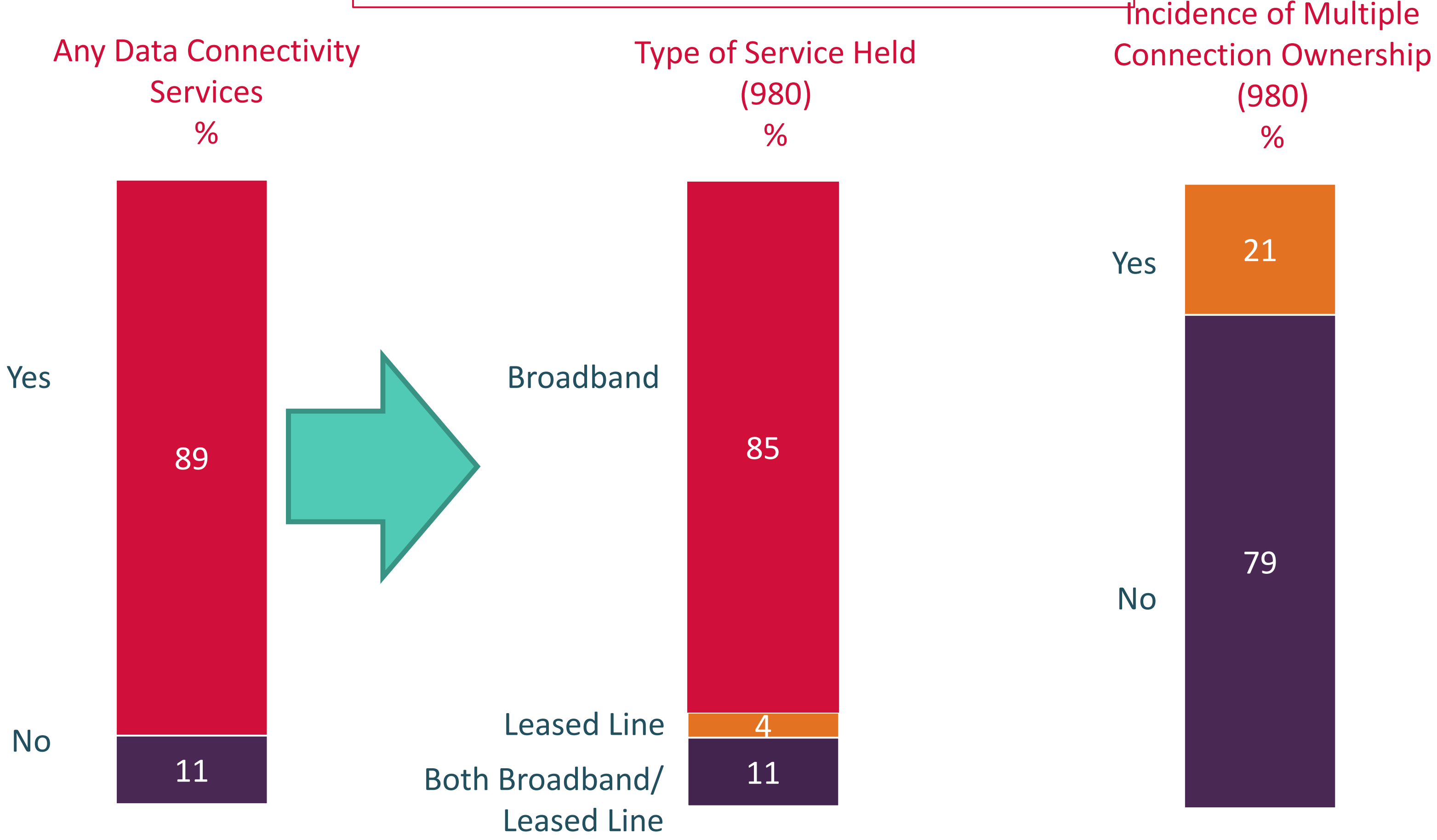
A broadband service is typically a mass market product or "off the shelf" product sold to households and businesses. The download and upload bandwidth or speeds are usually different and may not be guaranteed (i.e. you may get faster/slower speeds at certain times). There may also be no or limited service contracts or Service Level Agreements (SLAs) between you and your service provider (e.g. no guaranteed fault repair time within an agreed set of hours).

On the other hand, a leased line provides the same or near similar bandwidth/speed (whereby download and upload bandwidth/speeds are the same), the bandwidth or speed you get is guaranteed and there is typically an SLA between you and your service provider for things such as service availability and fault repair times (e.g. within a certain number of hours).

Connection Details – Top Level Overview

(Base: All Business Decision Makers - 1,100)

Q.7 What data connectivity services does your company have?



89% of Irish business have either a broadband or leased line connection. Of those holding a connection 21% have access to two or more means of connection.

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Access Type by Company Size (Multiple Responses)

(Base: All Respondents Who Use Data Connectivity Services, N= 980)

Q.8 Can I ask you, in your business which of the following means of accessing services are used?

	Total (n=980)	No. of Employees			
		1-10 (794) %	11-50 (154) %	51-249 (100*) %	Corporate 250+ (100*) %
Fixed broadband via a traditional fixed telephone line (landline)	64%	67	54	47	51
Fixed broadband provided by a Fibre network	15%	12	26	27	41
3G\4G Mobile Broadband (dongle Mi-Fi devices, sim card in Tablets)	12%	11	12	17	41
Fixed broadband via a cable TV network	7%	7	9	12	40
Internet access over Mobile Phone using 3G\4G data package (non Wi-Fi)	7%	6	12	9	12
Broadband provided by Satellite	4%	3	6	4	5
Fixed wireless connection, provided via a modem that receives radio signals through the air	3%	4	3	1	10
Any Leased Line	15%	9	28	59	75

* = base expressed in unweighted terms throughout the presentation

64% of Irish business connects to broadband via a landline. Use of this broadband access means is highest for the Micro business sector (1-10 Employees) at 67%.

Access Type Most Often Used (Single Code)

(Base: All Respondents Who Use Data Connectivity Services, N= 980)

Q.10 Which service do you consider to be your primary/main access mode?

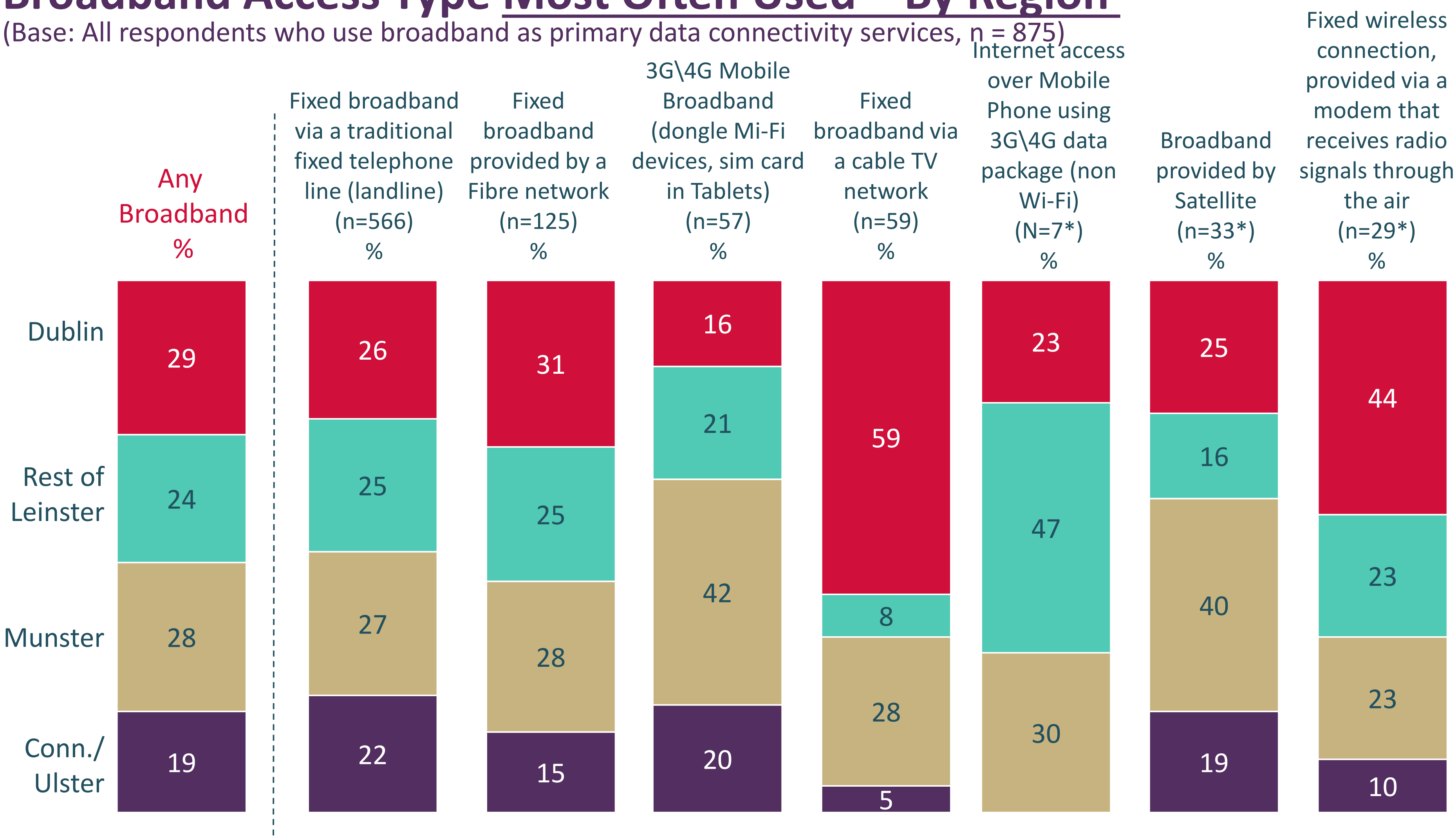
	Total (n=980)	No. of Employees: 1-10 (794) %	11-50 (154) %	51-249 (100*) %	Corporate 250+ (100*) %
Fixed broadband via a traditional fixed telephone line (landline)	58%	63	40	25	11
Fixed broadband provided by a Fibre network	13%	11	20	15	18
Fixed broadband via a cable TV network	6%	5	9	5	4
3G/4G Mobile Broadband (dongle Mi-Fi devices, sim card in Tablets)	6%	7	2	-	-
Broadband provided by Satellite	3%	4	3	-	1
Fixed wireless connection, provided via a modem	3%	3	3	2	1
Internet access over Mobile Phone using 3G\4G data package (non Wi-Fi)	1%	1	-	-	-
Any Leased Line	9%	5	21	51	64

* = base expressed in unweighted terms throughout the presentation

58% of Irish business rely on broadband access via a traditional phone line with fibre the next most common broadband access mode at 13%.

Broadband Access Type Most Often Used – By Region

(Base: All respondents who use broadband as primary data connectivity services, n = 875)



Broadband via a cable TV network is most prevalent in Dublin. Broadband via a traditional fixed telephone line is more evenly split across the geographic regions.

REDC

Specific Type of Leased Line Access by Company Size (Single Response)

(Base: All Respondents Who Use Data Connectivity Services, N= 980)

Q.10 Which service do you consider to be your primary/main access mode?

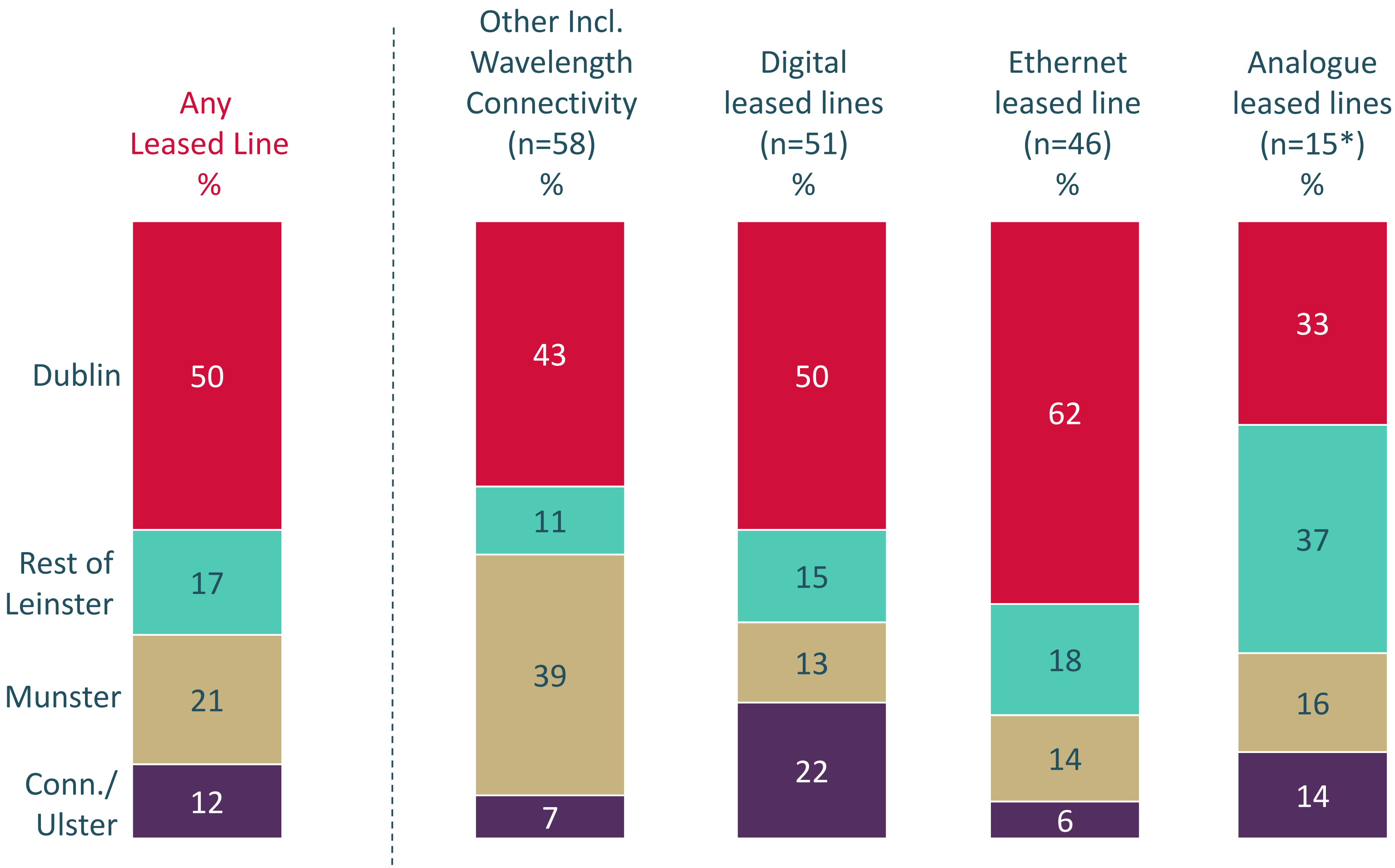
	Total (980)	Company Size			
		1-10 % (794)	11-50 % (154)	51-249 % (100)	Corporate 250+ % (100)
Any Leased Line	9%	5	21	51	64
Other inc. Wavelength Connectivity	3%	0	11	23	14
Digital	3%	1	5	15	21
Ethernet	2%	1	3	9	27
Analogue	1%	1	1	1	2

For primary means of access, other including wavelength and digital leased lines are equally used at 3%.

REDC

Leased Line Access Type Most Often Used – By Region

(Base: All respondents who use Leased Lines as primary data connectivity services, n = 176)

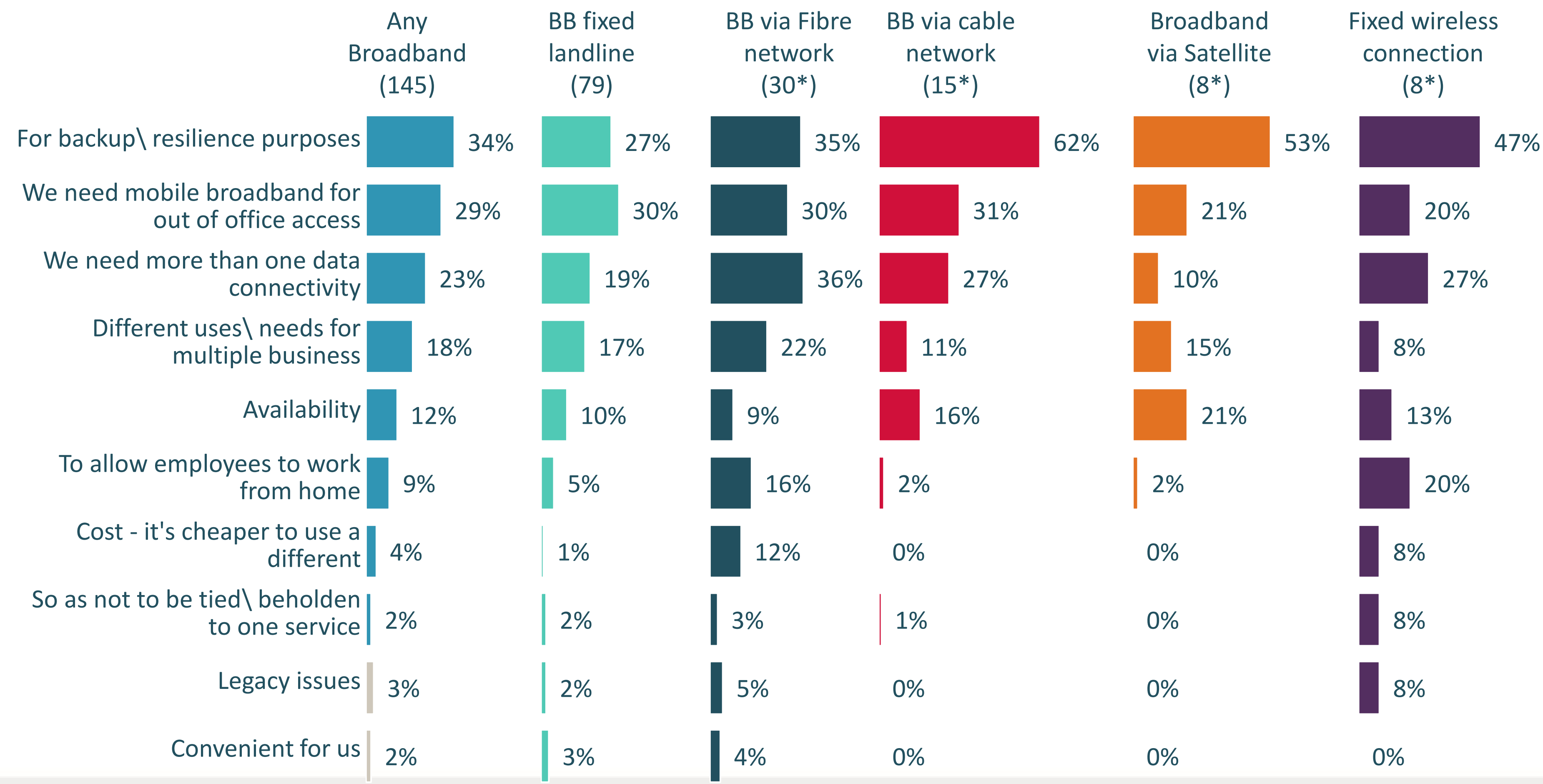


Leased lines are most prevalent in Dublin, particularly Ethernet leased lines.

Why Use More Than One Means of Data Connectivity

(Base: All broadband primary users using more than one means of data connectivity= 145)

Q.15/73/108 Why does your business use more than one means data connectivity services in your business?



- *Small Base*

Mobile BB N=5

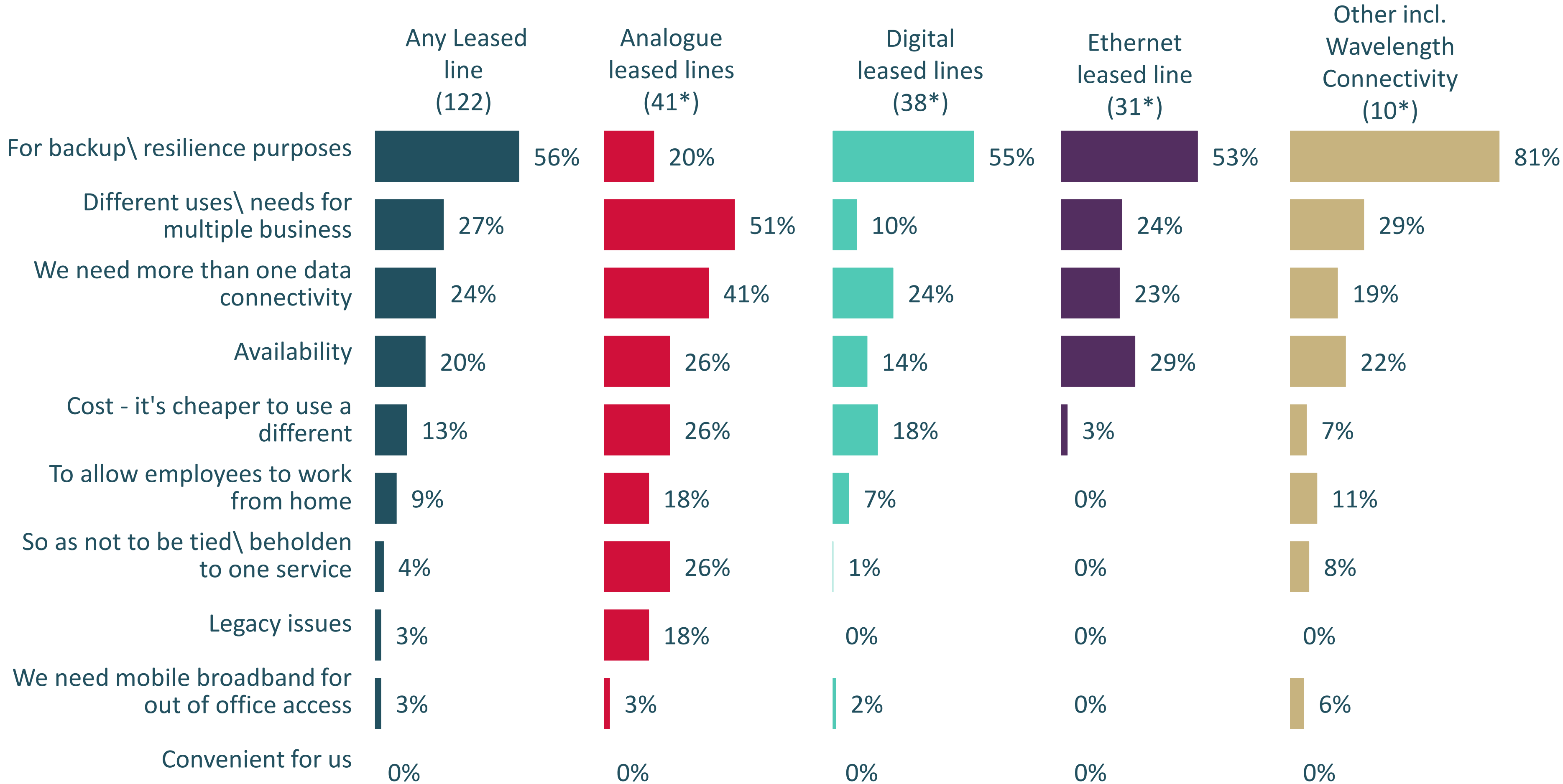
Main reason primary users use more than one means of data connectivity is for back up purposes or using connection in the out of office environment.

REDC

Reasons for Using More than One Means of Data Connectivity

(Base: All Primary service leased line using more than one means of data connectivity, n = 122)

Q.15/73/108 Why does your business use more than one means data connectivity services in your business?



- *Small Base*

All base sizes unweighted

Main reason leased line primary users use more than one means of data connectivity is for back up/resilience purposes.

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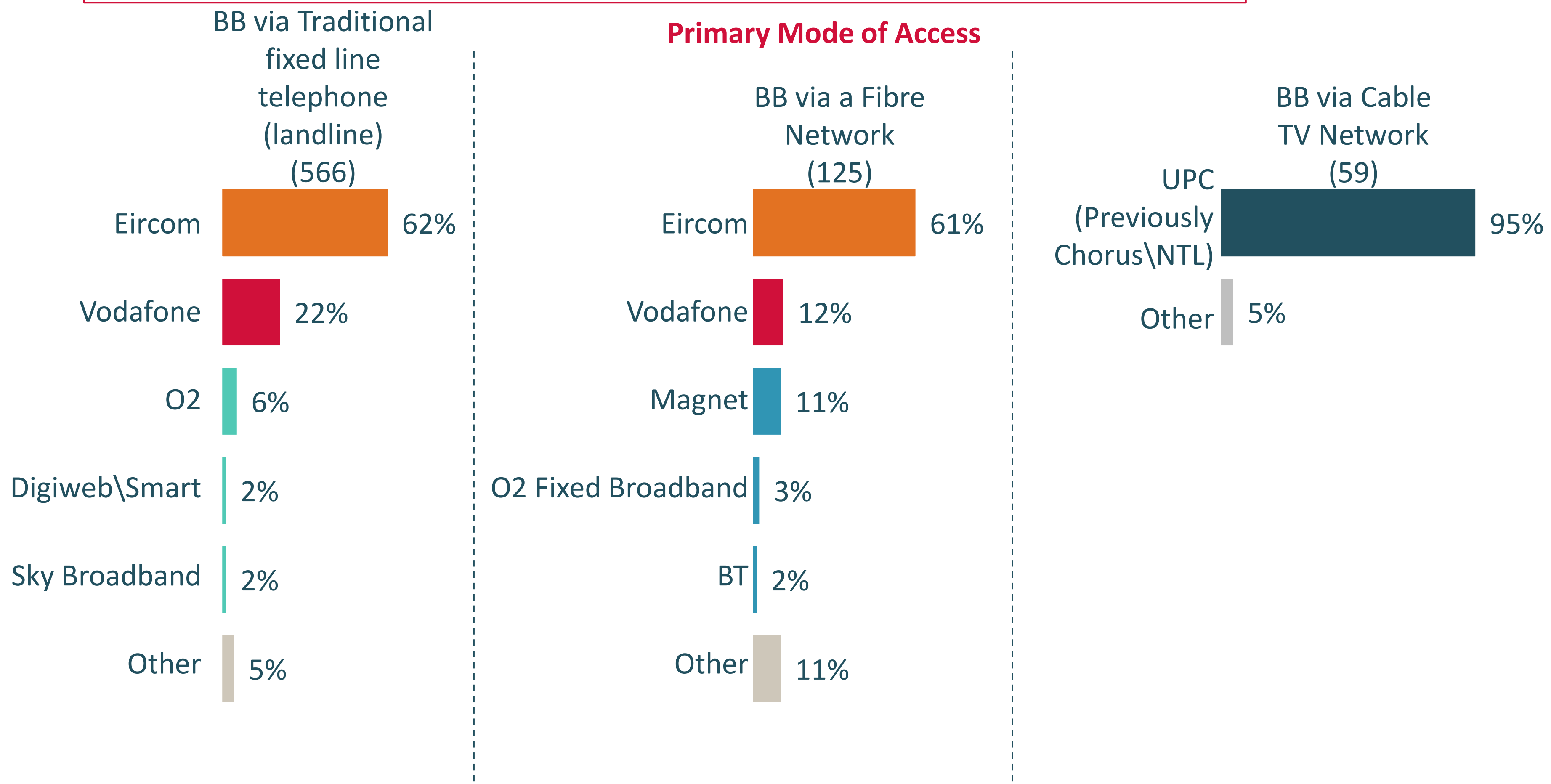
Broadband Users – Supplier and Usage

Current Broadband Provider Share

(Base: All Broadband users, n = 875)

Q.16 What company does your business currently use as your service provider (For each access type)?



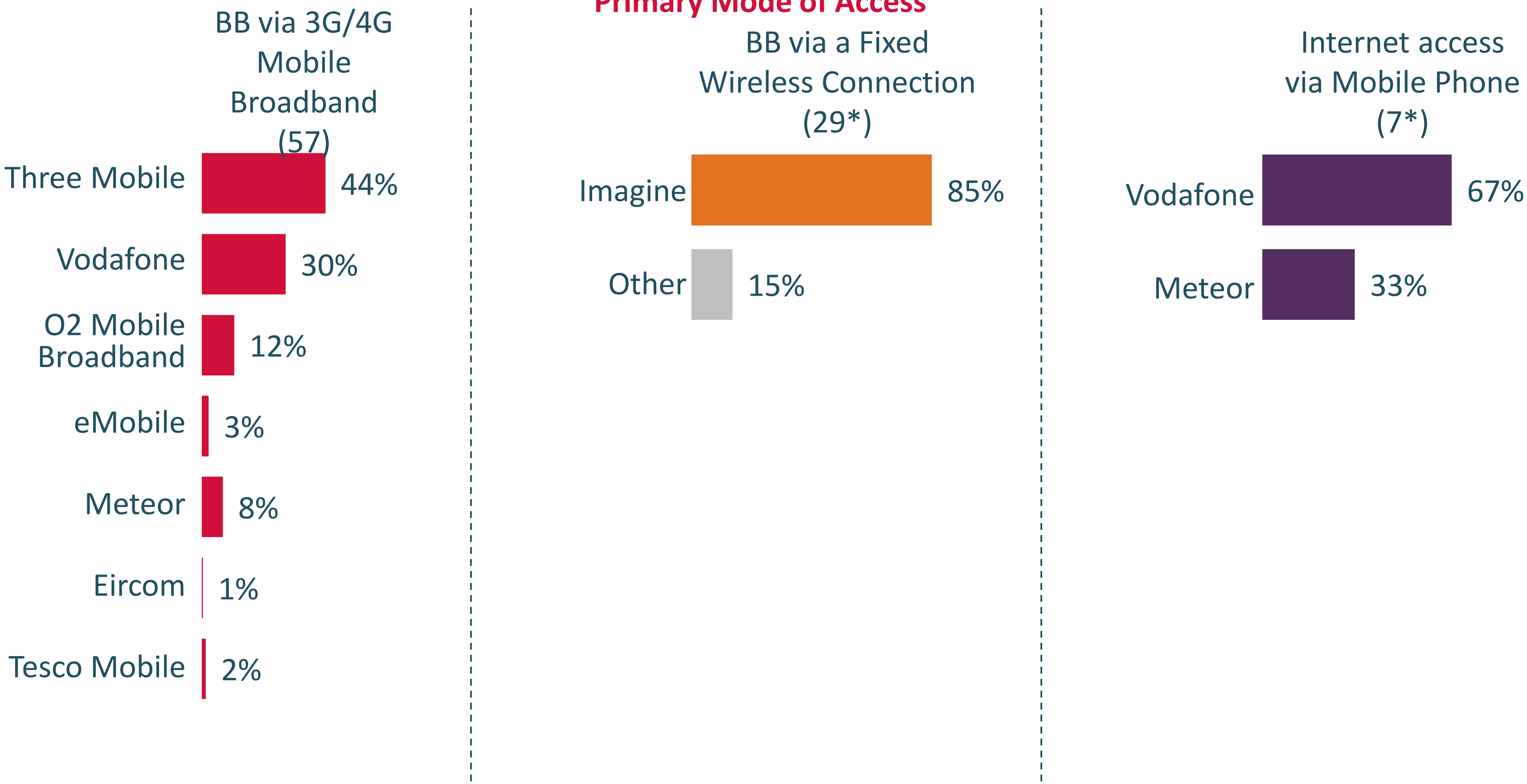
Eircom have 62% share of broadband users using a traditional fixed line telephone and 61% share of broadband of fibre broadband users. UPC have 95% share of cable broadband users.

Current Broadband Provider Share

(Base: All Broadband users, n = 875)

Q.16 What company does your business currently use as your service provider (For each access type)?

Primary Mode of Access



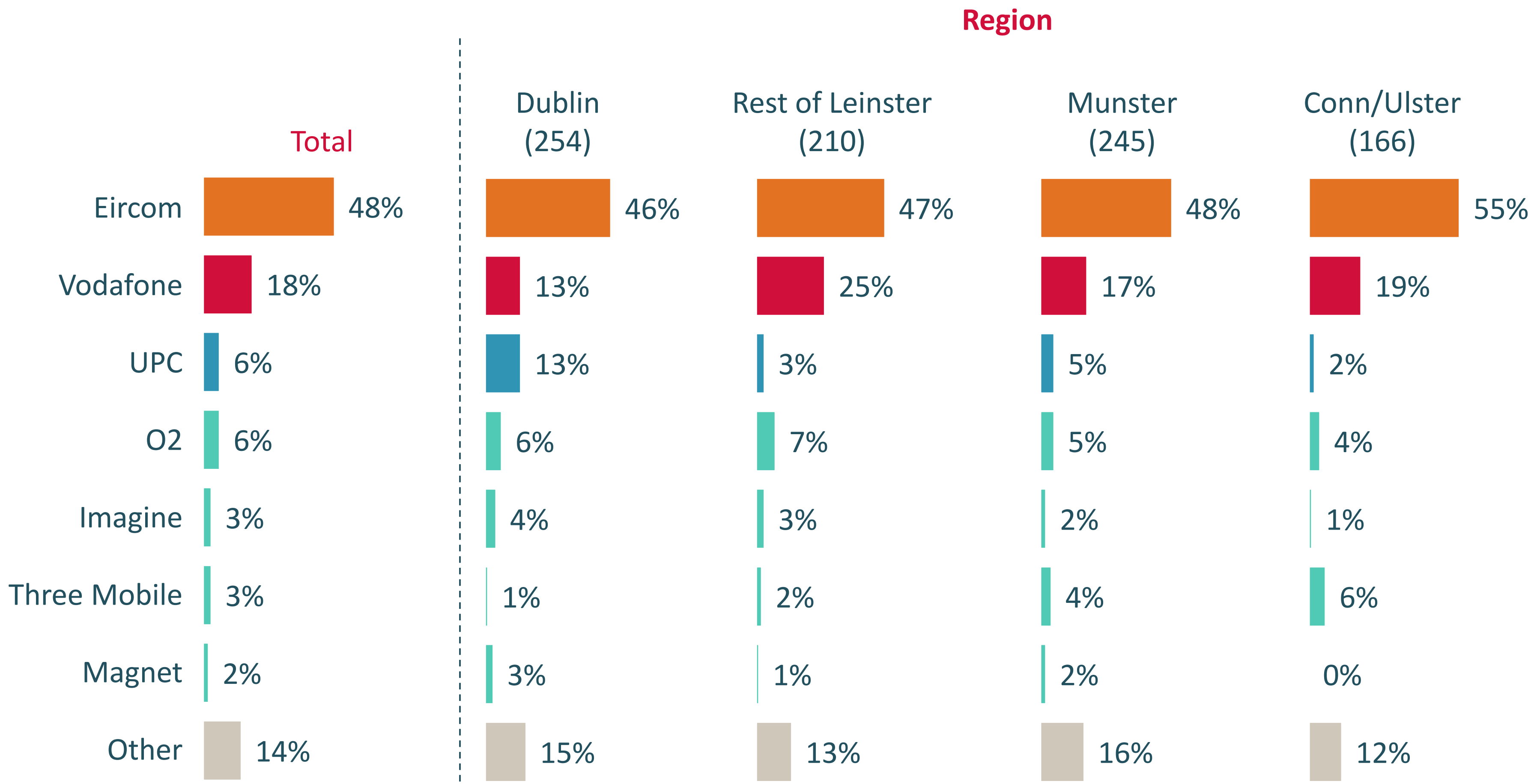
* Small base

Three mobile have 44% share of mobile business broadband users. Most fixed wireless access broadband users have Imagine as their provider.

Current Broadband Provider Share

(Base: All Primary Broadband users, n = 875)

Q.16 What company does your business currently use as your service provider (For each access type)?

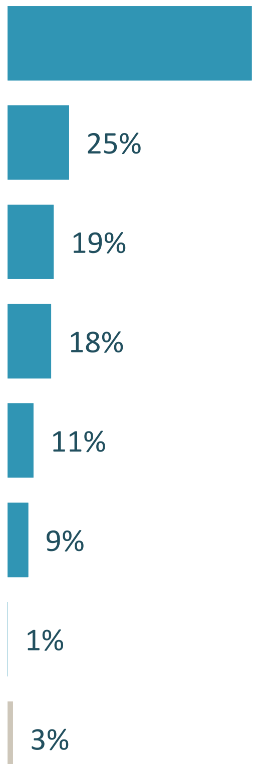


Overall Eircom is used by 48% of primary broadband business users, followed by Vodafone at 18%. Eircom is used by most primary broadband business users in Connaught/Ulster region while Vodafone is used by most in Leinster (outside of Dublin)

Use of Primary Service – Broadband Primary Access Users

(Base: All respondents who use broadband as primary data connectivity services, n= 875)

Q.17/75/110 What does your business use your (SCRIPT IN PRIMARY SERVICE Q10) for?



	Any Broadband Primary Access (n=875)	Primary Mode of Access						
		Fixed BB (Landline) (n=566)	BB Fibre Network (n=125)	BB Cable Network (n=59)	Mobile BB (n=57)	Fixed Wireless (n=29*)	BB Satellite (33*)	Mobile Phone (7*)
Email and internet	97%	98%	96%	93%	100%	100%	100%	85%
Data services such as cloud computing and other software services	25%	21%	40%	39%	10%	39%	34%	-
Connectivity between business premises	19%	16%	28%	29%	5%	21%	33%	23%
Employee remote access to the business network	18%	16%	31%	22%	6%	24%	27%	-
Disaster recovery services	11%	9%	16%	19%	4%	16%	22%	-
Voice - VoIP\ Voice over broadband	9%	7%	19%	10%	4%	1%	26%	23%
Card Machines	1%	1%	-	3%	-	-	4%	15%
Other	3%	3%	5%	9%	2%	-	-	-

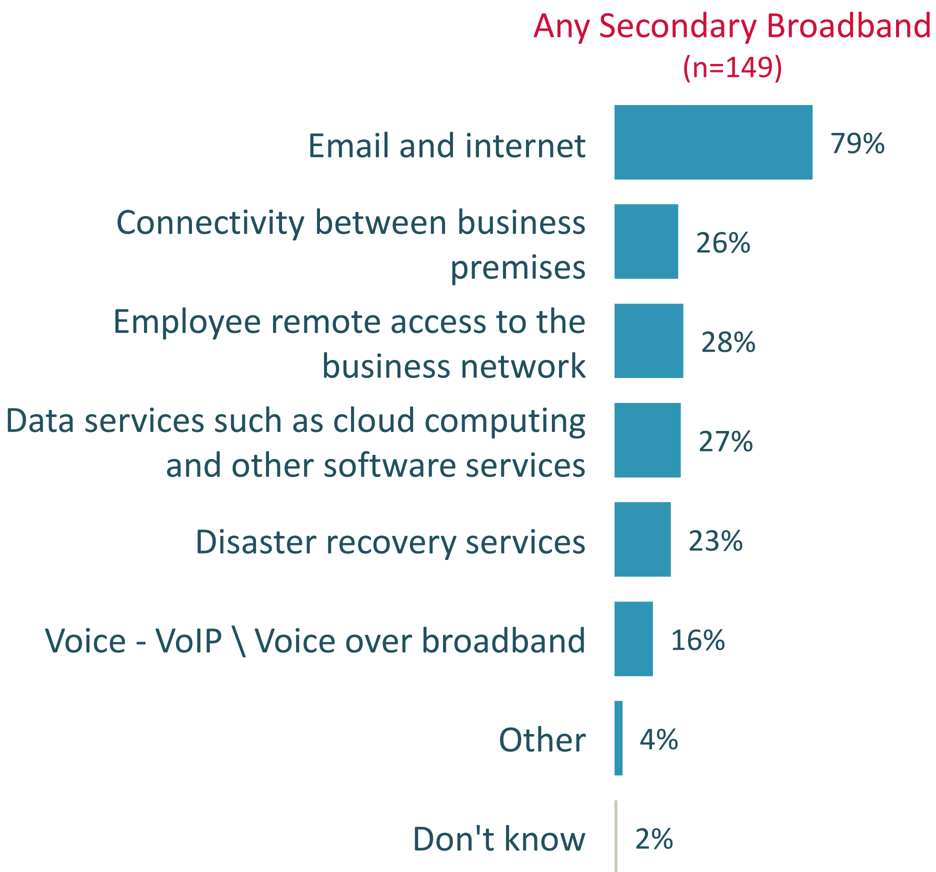
* Small Base

97% of companies using broadband as a primary means of data connectivity stated that they use broadband for email and internet. The next highest category of usage (25%) was for data services.

Use of Secondary Service – Broadband Secondary Access Users

(Base: All respondents who use broadband as secondary data connectivity services, n= 149)

Q.18/76/111 What does your business use your <secondaryservice> for?



	Any Secondary Broadband (n=149)	Secondary Mode of Access					
		Fixed BB (Landline) (n=46*)	BB Fibre Network (n=12*)	BB Cable Network (n=5*)	Mobile BB (n=36*)	Fixed Wireless (n=7*)	BB Mobile Ph (n=39*)
Email and internet	79%	68%	95%	84%	82%	62%	87%
Connectivity between business premises	26%	29%	41%	14%	30%	-	22%
Employee remote access to the business network	28%	29%	24%	14%	40%	-	18%
Data services such as cloud computing and other software services	27%	22%	37%	28%	37%	4%	21%
Disaster recovery services	23%	33%	32%	14%	23%	58%	4%
Voice - VoIP \ Voice over broadband	16%	25%	38%	12%	15%	4%	2%
Other	4%	9%	6%	-	1%	13%	
Don't know	2%	-	-	16%	3%	-	4%

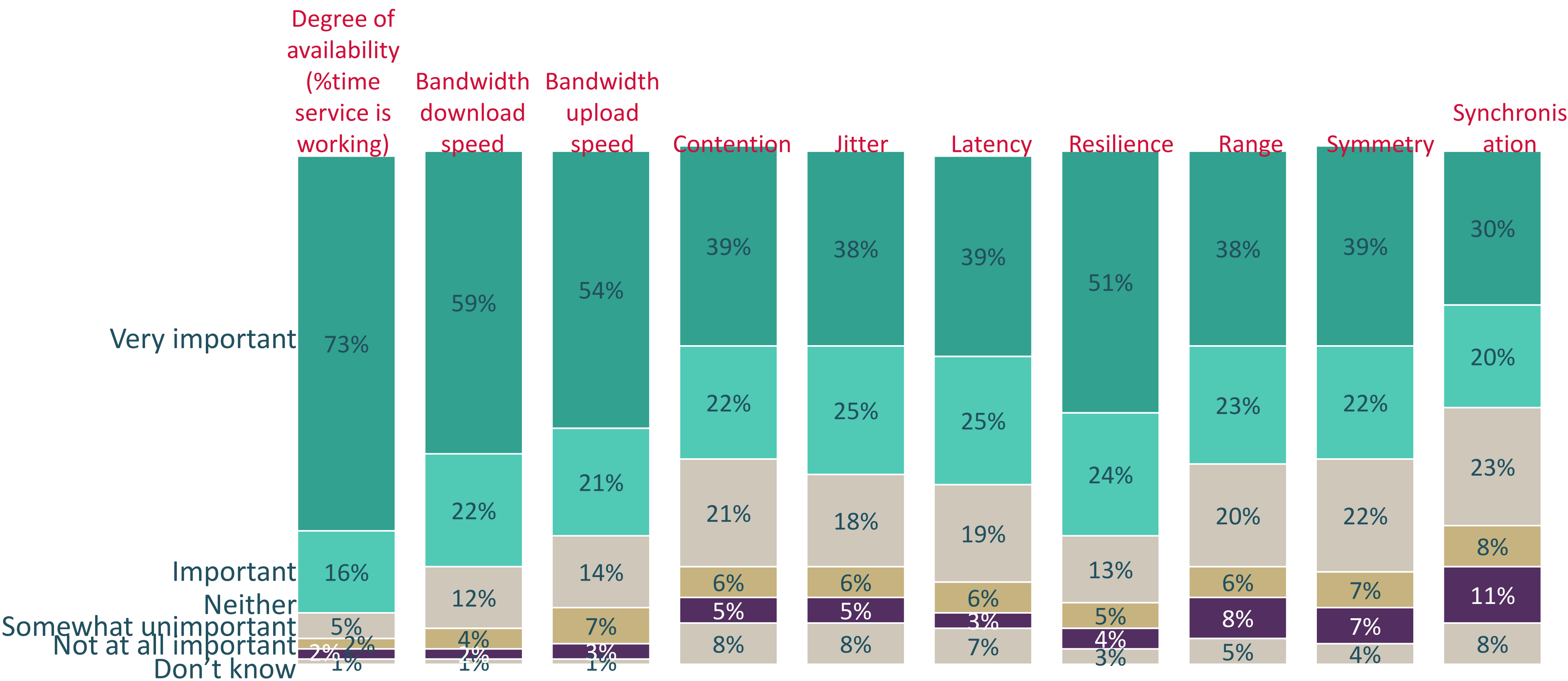
* Small Base

Email and internet access is also the main use of secondary broadband connections.

Importance of Aspects When Selecting Primary Broadband Supplier?

(Base: All respondents who use a primary services, n= 875)

Q.19/77/112 Thinking about your primary service, how important are each of the following aspects when selecting a service supplier?



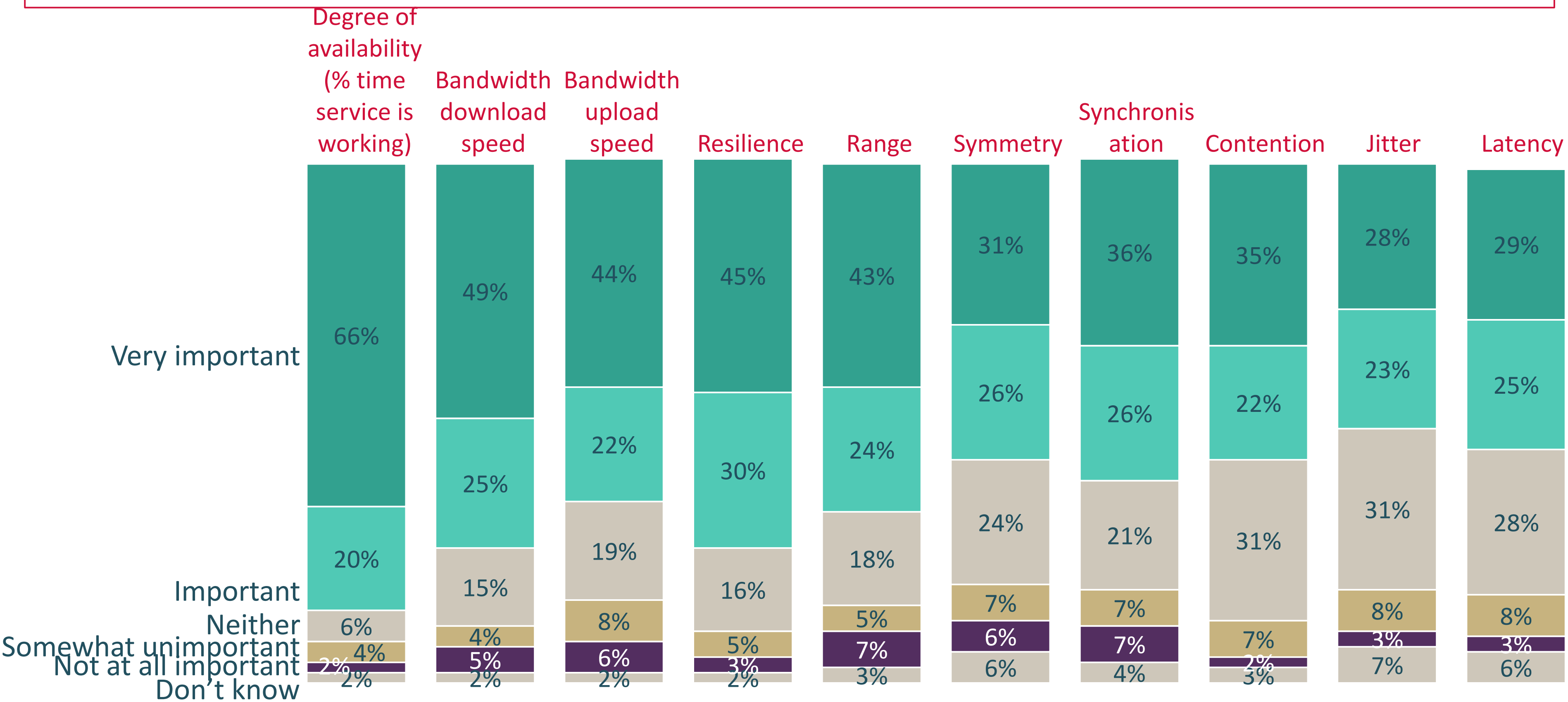
Total: Important	Degree of availability	Bandwidth download speed	Bandwidth upload speed	Contention	Jitter	Latency	Resilience	Range	Symmetry	Synchronisation
Total: Important	89%	81%	75%	61%	63%	64%	75%	61%	61%	50%

73% of those with broadband state that availability (% of time service is working) is very important when selecting a primary broadband supplier.

Importance of Aspects when Selecting Secondary Broadband Supplier?

(Base: All respondents who use a secondary service, n= 149)

Q.20/78/113 Thinking about your Secondary service, how important are each of the following aspects when selecting a service supplier?



Total: Important	Degree of availability	Bandwidth download speed	Bandwidth upload speed	Resilience	Range	Symmetry	Synchronisation	Contention	Jitter	Latency
	86%	74%	66%	75%	67%	57%	62%	57%	51%	54%

Availability (% of time service is working), and download/upload speed are-the main considerations when selecting a secondary broadband supplier – similar to primary broadband supplier.

REDC

Importance of Aspects when Selecting Secondary Broadband Supplier?

(Base: All respondents who use a secondary service, n= 149)

Q.20/78/113 Thinking about your Secondary service, how important are each of the following aspects when selecting a service supplier?

	Total (n=149)	Primary Mode of Access					
		Fixed BB (Landline) (n=46*)	BB Fibre Network (n=12*)	BB Cable Network (n=5*)	Mobile BB (n=36*)	Fixed Wireless (n=7*)	Mobile Phone (n=39*)
Degree of availability (%time service is working)	86%	77%	79%	100%	92%	60%	96%
Bandwidth - download speed	74%	64%	77%	100%	89%	22%	85%
Bandwidth - upload speed	66%	55%	74%	71%	82%	19%	74%
Resilience	75%	67%	91%	54%	72%	51%	86%
Range	67%	55%	64%	44%	71%	31%	86%
Symmetry	57%	49%	54%	57%	42%	31%	82%
Synchronisation	62%	58%	49%	44%	56%	13%	77%
Connection	57%	58%	64%	44%	44%	3%	65%
Jittery	51%	49%	62%	42%	43%	3%	60%
Latency	54%	54%	69%	41%	42%	19%	65%

* Small Base BB Satellite n =2

Availability (% of time service is working), download/upload speed are the main considerations when selecting a secondary broadband supplier – similar to primary broadband supplier.

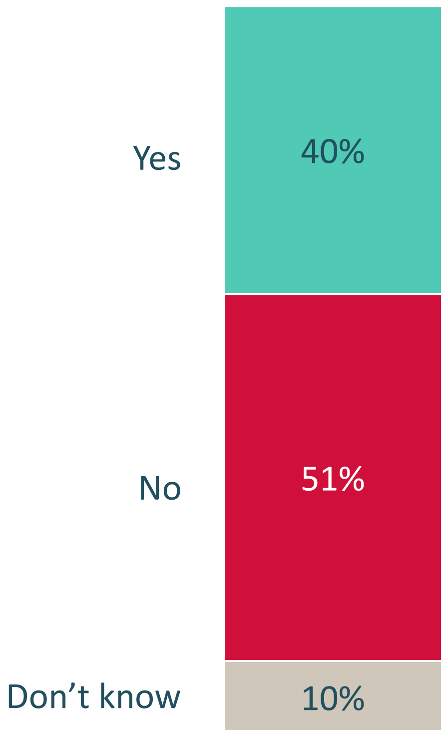
Service Level Agreements (Broadband)

Service Level Agreement's (SLA's)

(Base: All primary broadband users, n = 875)

Q.21/97/114 Do you have service contracts or Service Level Agreements (SLAs) with your service provider? These might include fault repair times, out of hours service, compensation if service levels are not met etc.

Total Broadband
(n=875)



Primary Mode of Access – Yes Service Level Agreement							
	BB Traditional Phone (n=566)	BB Fibre Network (n=125)	BB Cable Network (n=59)	Mobile BB (n=57)	Fixed Wireless (n=29*)	BB Satellite (n=33*)	Mobile Phone (n=7*)
Yes	36	54	45	33	45	49	26
No	52	38	55	60	50	35	74
Don't Know	12	8	0	7	5	16	0

*Base small

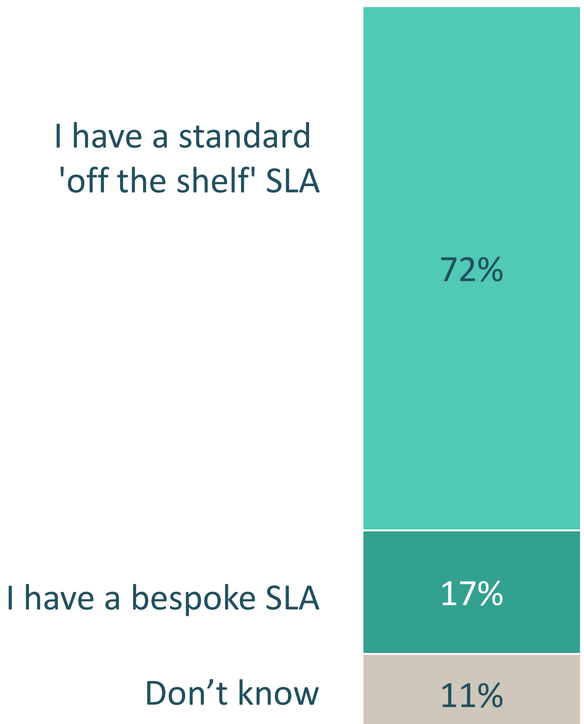
40% of business's with broadband have SLA's, with fibre broadband users the most likely to have one.

Type of SLA's

(Base: All broadband primary users who have an SLA in place, n = 346)

Q.22 Do you have a standard 'off the shelf' or bespoke SLA with your broadband service provider(s)? A bespoke SLA might have more parameters or better service level commitments included in it compared to a standard SLA.

Total Broadband
(n=346)



Primary Mode of Access – Standard SLA

BB Traditional Phone (n=202)	BB Fibre Network (n=67)	BB Cable Network (n=26*)	Mobile BB (n=19*)	Fixed Wireless (n=13*)	BB Satellite (n=16*)	Mobile Phone (n=2*)
72%	70%	72%	76%	76%	63%	n/a

Primary Mode of Access – Bespoke SLA*

BB Traditional Phone (n=202)	BB Fibre Network (n=67)	BB Cable Network (n=26)	Mobile BB (n=19)	Fixed Wireless (n=13)	BB Satellite (n=16)	Mobile Phone (n=2)
17%	20%	12%	24%	1%	21%	n/a

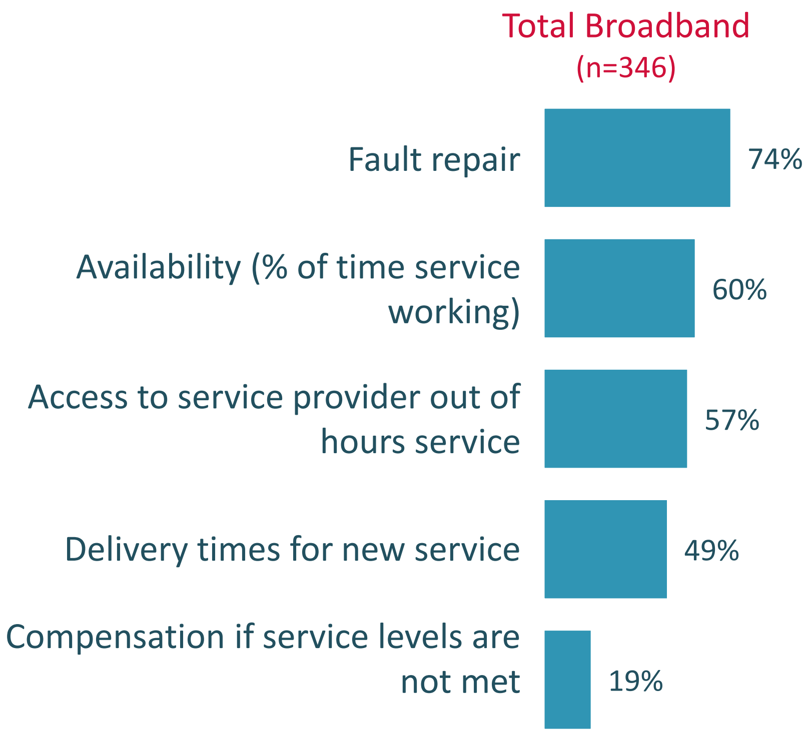
*Small base

72% of primary broadband users who have an SLA have a standard 'off the shelf' SLA.

What Parameters Are Included in the SLA's You Have?

(Base: All Broadband Users Who Use Broadband as a Primary Service And Have an SLA In Place , n= 346)

Q.23/Q.81/Q.116 Do you know which if any of the following parameters are included in your SLA?



	Primary Mode of Access						
	Fixed BB (Landline) (n=202)	BB Fibre Network (n=67)	BB Cable Network (n=26*)	Mobile BB (n=19*)	Fixed Wireless (n=13*)	BB Satellite (n=16*)	Mobile Phone* (n=2)
Fault repair	76%	75%	66%	44%	77%	81%	n/a
Availability (% of time service working)	57%	65%	61%	58%	67%	64%	n/a
Access to service provider out of hours service	53%	69%	54%	66%	41%	59%	n/a
Delivery times for new service	47%	58%	52%	26%	48%	61%	n/a
Compensation if service levels are not met	19%	27%	10%	7%	20%	17%	n/a

*Base small

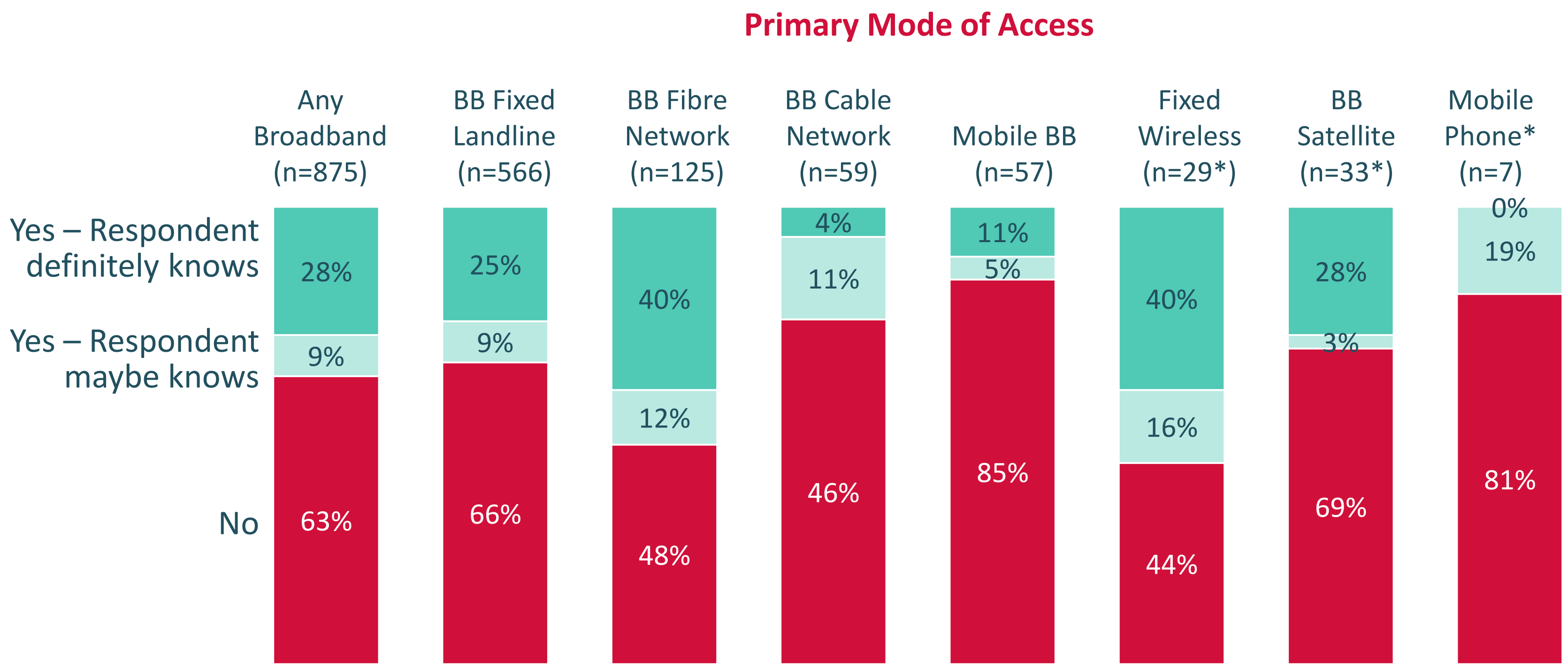
The highest level seen for parameter inclusion is for fault repair (74%) with the lowest level being compensation at just 19% of broadband SLA's.

Speed of
Connections
(Broadband)

Knowledge of Claimed Maximum Download Speed

(Base: All respondents who use broadband as primary data connectivity services, n= 875)

Q.23b. Do you know the claimed maximum download speed for your main broadband (Insert service Q10) service?



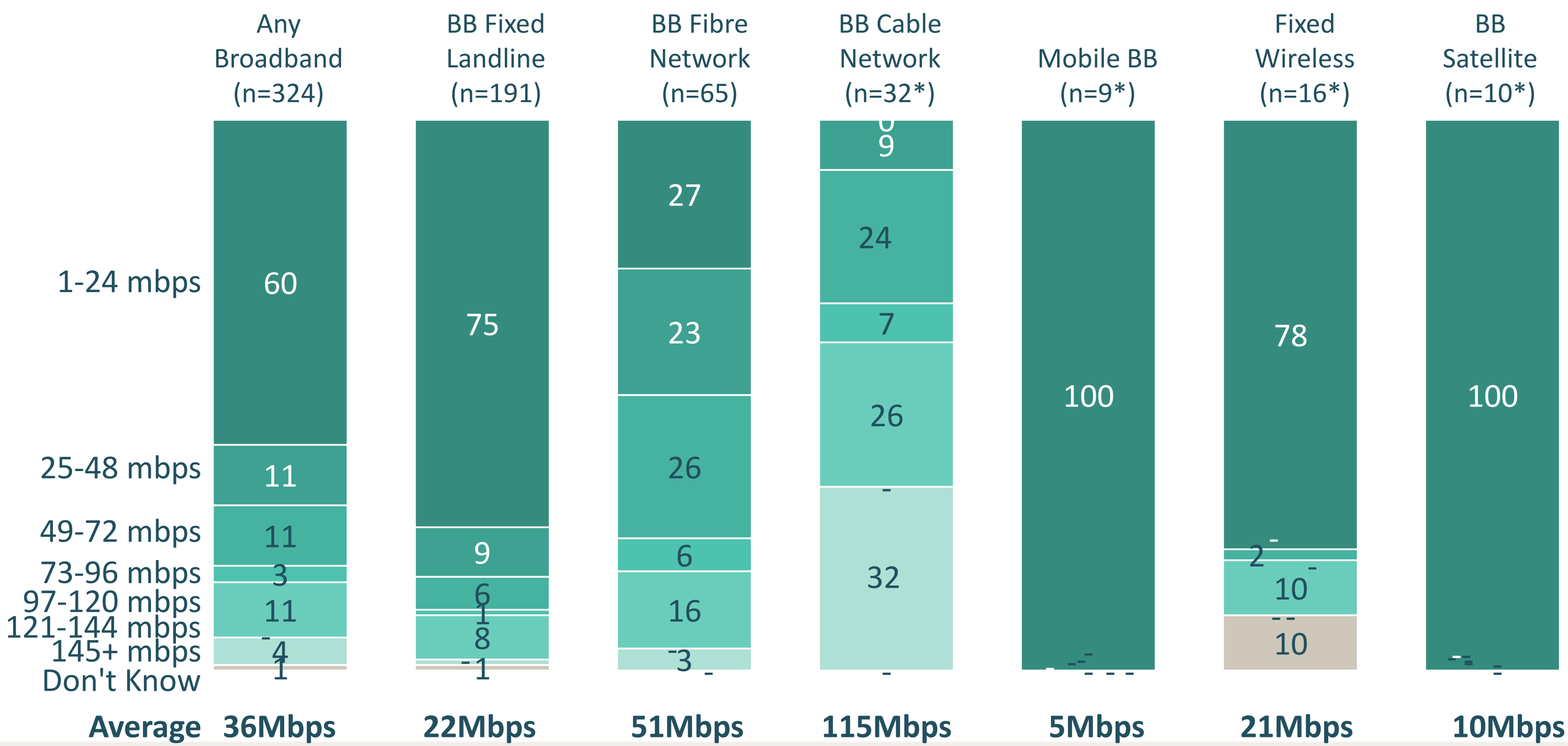
*Base small

Broadband users with a fibre connection are most likely to know their maximum download speed.

What is Maximum Claimed Download Speed?

(Base: Total Broadband Users Who Know Download Speed, n=324)

Q.24/Q.82 What is the maximum claimed download speed for your <primaryservice> in Megabits per second?



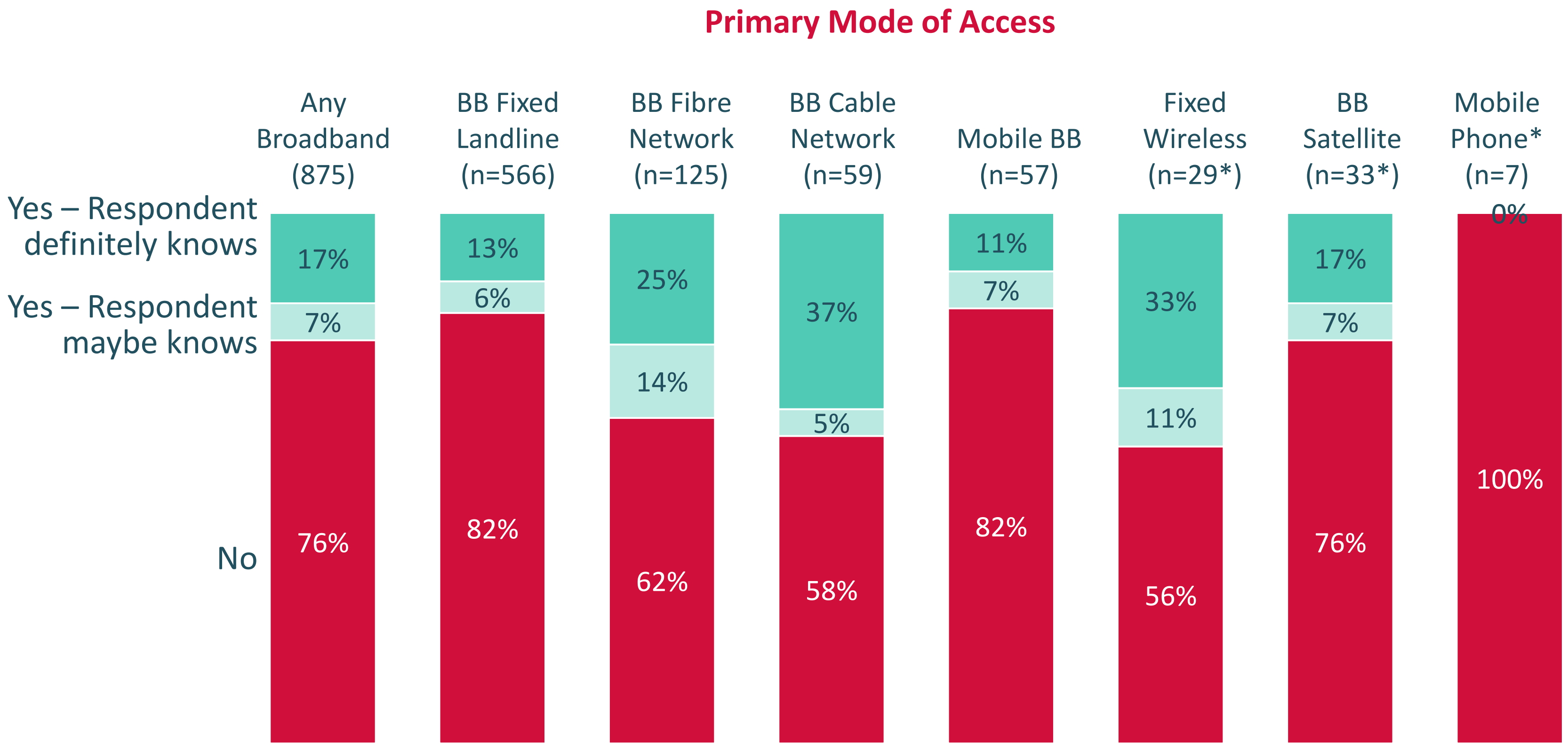
*Base small

Cable users have the highest claimed download speed among broadband users.

Knowledge of Claimed Maximum Upload Speed

(Base: All Broadband users, n = 875)

Q.25/Q.83 Do you know the claimed maximum upload speed for your (insert service type Q10)?



*Base small

Cable broadband users (42%) are most likely to know their claimed maximum upload speed of broadband.

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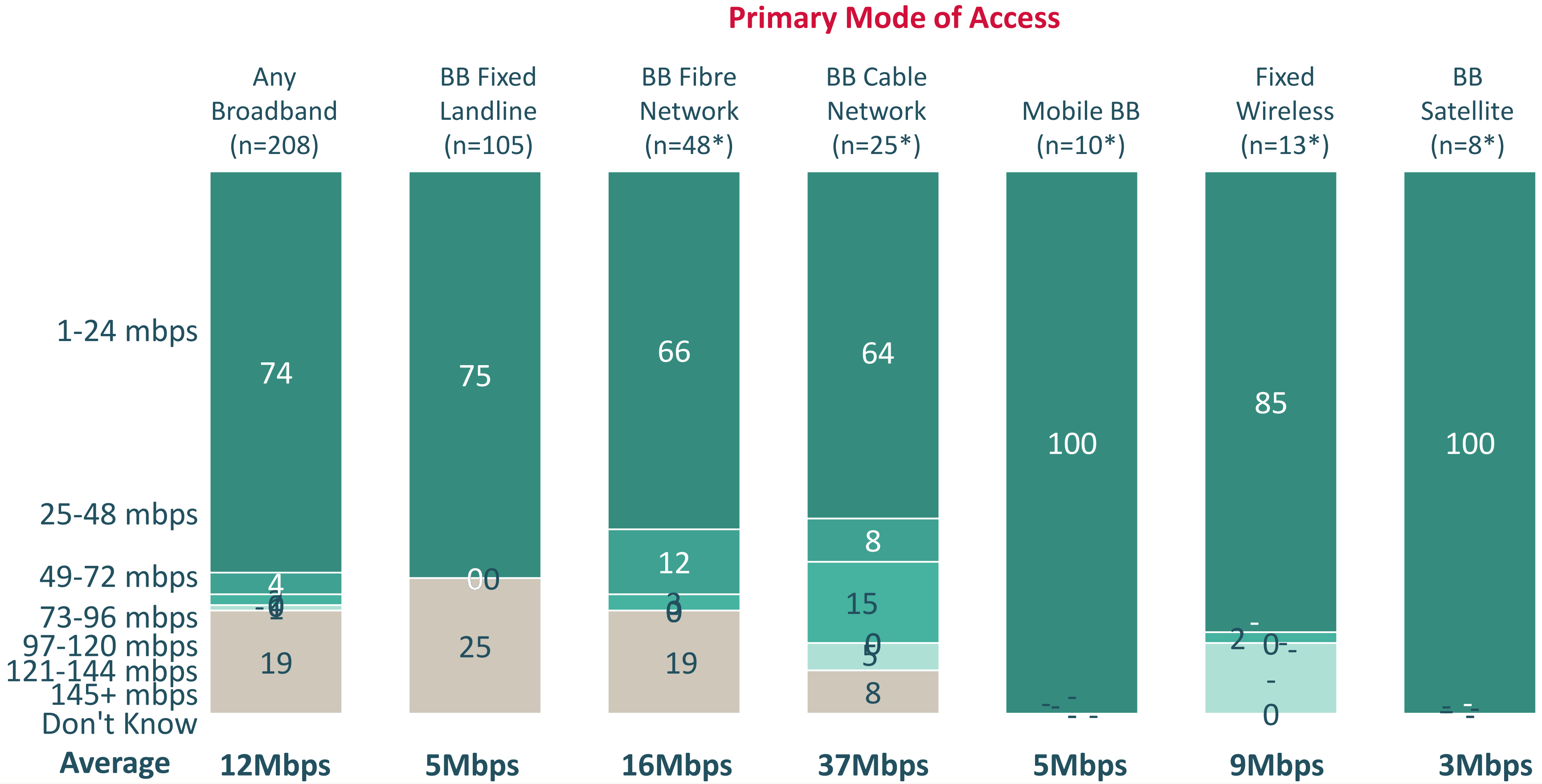
What is Maximum Claimed Upload Speed?

(Base: Total Broadband Users Who Know Upload Speed, n=208)

Q.26/Q.84 What is the maximum claimed upload speed for your <primaryservice> in Megabits per second?



*Base small

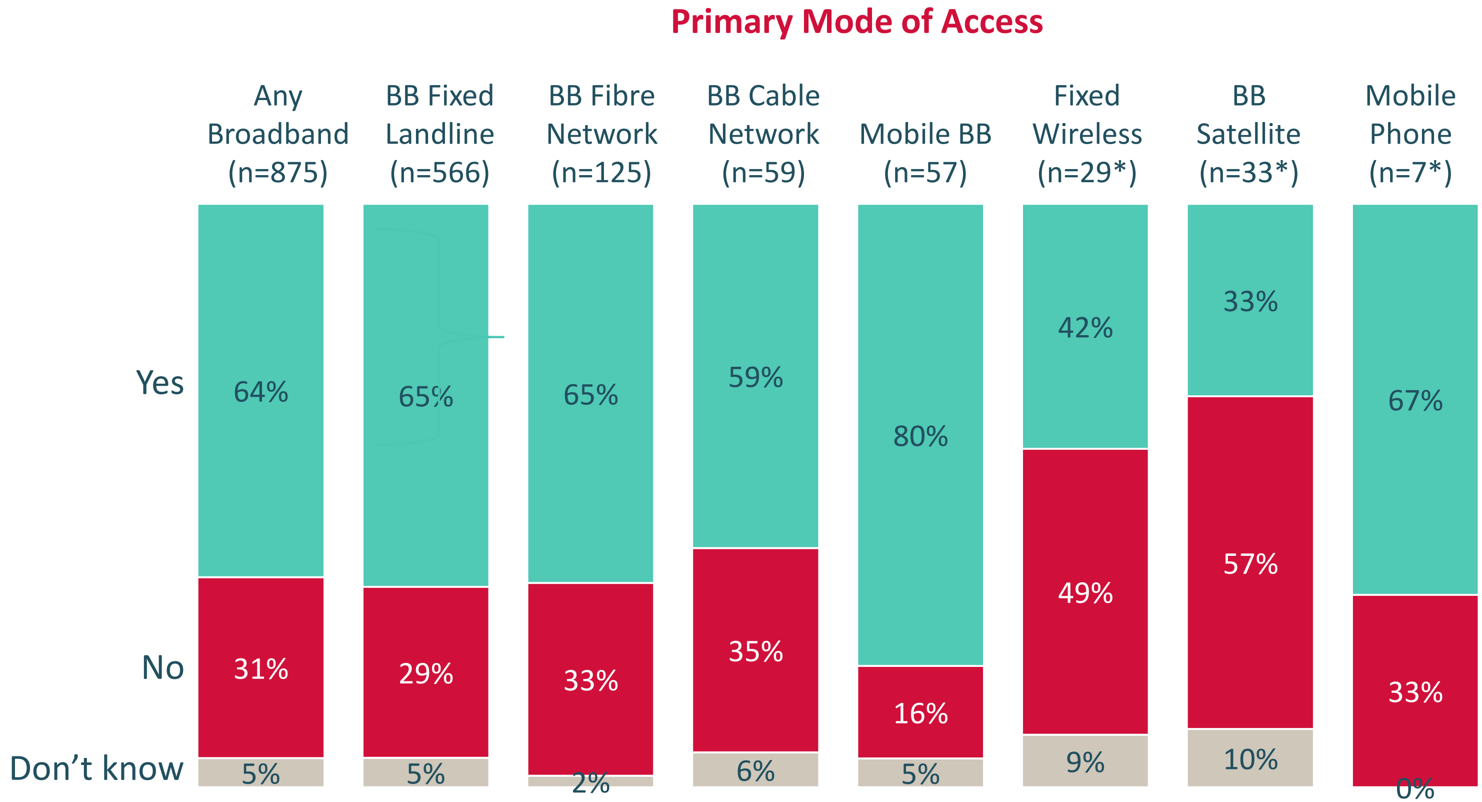
The fastest claimed average broadband upload speed of 37Mbps is made by cable users, however the base size within this group is very small.

Contracts, Loyalty And Ability To Negotiate (Broadband)

Is Primary Service in Contract?

(Base: Total Broadband Users, n = 875)

Q.47/Q.105 Thinking about your primary broadband service, are you currently tied into a contract with your service provider?



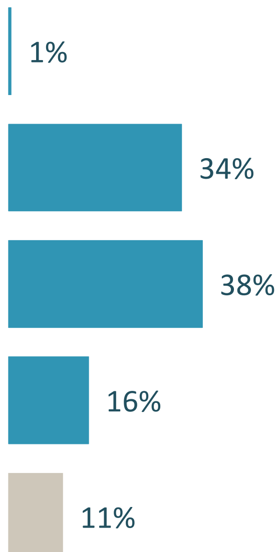
*Caution Small Base

Across various broadband customer types, mobile broadband users (80%) are most likely to be in a contract.

Minimum Contract Period - Those in Contract

(Base: Total Broadband Users Who Are Tied Into A Contract, n=559)

Q.48/Q.106 What is the minimum contract period of this service from sign up time to when you can leave your service provider?



	Total Broadband (n=559)	Primary Mode of Access: BB Fixed Landline (n=371)	BB Fibre Network (n=81)	BB Cable Network (n=35)	Mobile BB (n=45)	Fixed Wireless (n=12*)	BB Satellite (n=11*)	Mobile Phone (n=5*)
Six Months	1%	1%	2%	0%	0%	0%	0%	0%
Twelve Months	34%	37%	23%	34%	33%	62%	12%	16%
Eighteen Months	38%	36%	41%	29%	42%	38%	59%	50%
Longer than 18 Months	16%	16%	19%	9%	18%	0%	22%	34%
Don't know	11%	10%	16%	28%	6%	0%	8%	0%

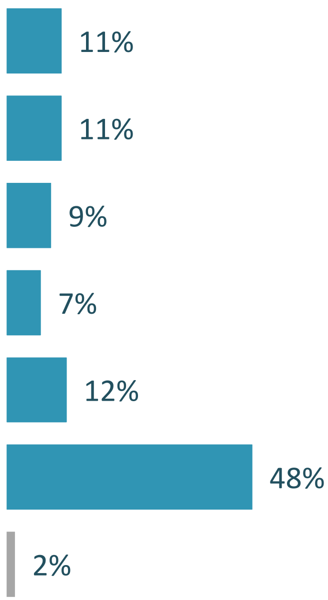
*Caution Small Base

A roughly even split is seen in the proportion of 12 month and 18 month contracts for those traditional fixed telephone broadband users, with a much more definitive split in contract length for Fibre Broadband customers with 41% having 18 month contracts.

Length of Time with Current Provider

(Base: Total Broadband Users, n=875)

Q.48b/Q.106b How long has your business been with your current main broadband service provider for?



	Total Broadband (n=875)	Primary Mode of Access						
		BB Fixed Landline (n=566)	BB Fibre Network (n=125)	BB Cable Network (n=59)	Mobile BB (n=57)	Fixed Wireless (n=29*)	BB Satellite (n=33*)	Mobile Phone (n=7*)
Less than 6 Months	11%	10%	13%	7%	15%	7%	9%	0%
Between 6 and 12 Months	11%	11%	10%	14%	14%	10%	10%	11%
Between 12 to 18 Months	9%	10%	6%	10%	6%	5%	8%	19%
Between 18 Months to 2 years	7%	6%	5%	9%	11%	9%	7%	15%
Between 2-3 years	12%	11%	9%	31%	10%	9%	24%	0%
Greater than 3 years	48%	50%	54%	25%	44%	60%	42%	56%
Don't know	2%	2%	2%	3%	0%	0%	0%	0%

*Caution Small Base

Most broadband users have been with their current provider for more than three years.

Broadband Users - Ability to negotiate terms and conditions

(Base: Total Broadband Users, n = 875)

Q.49/Q.107 Were you in a position to negotiate improved prices and or other terms and conditions with your broadband service provider?

	Total Broadband (n=875)	Primary Mode of Access						
		BB Fixed Landline (n=566)	BB Fibre Network (n=125)	BB Cable Network (n=59)	Mobile BB (n=57)	Fixed Wireless (n=29*)	BB Satellite (n=33*)	Mobile Phone (n=7*)
Yes	56%	58%	63%	50%	38%	66%	25%	34%
Yes - Strong Ability to negotiate	26%	27%	35%	19%	23%	29%	11%	11%
Yes - Moderate ability to negotiate	29%	31%	28%	31%	16%	37%	14%	23%
No - No ability to negotiate	36%	33%	32%	33%	60%	28%	63%	48%
Don't know	8%	9%	5%	17%	2%	7%	12%	18%

56% of business broadband users claimed to have had some ability to negotiate terms and conditions with their broadband service provider.

REDC

Bundles
(Broadband)

Incidence of Bundling Broadband

(Base: Total Broadband Users, n = 875)

Q.27/Q.85 Which of the following best describes how your business is billed for your broadband and fixed line phone and mobile phone which you may also have?

	Any Broadband (n=875)	Primary Mode of Access						
		BB Fixed (Landline) (n=566)	BB Fibre Network (n=125)	BB Cable Network (n=59)	Mobile BB (n=57)	Fixed Wireless (n=29*)	BB Satellite (n=33*)	Mobile Phone (n=7*)
I receive a single bill for my broadband service that includes at least one of the other services I have	64%	73%	55%	62%	29%	59%	10%	52%
I receive a separate bill for my broadband service but I use the same provider for at least one of the other services	10%	10%	9%	3%	20%	23%	8%	0%
I receive a separate bill for my broadband service as I receive all other services from different providers	20%	13%	26%	28%	34%	15%	79%	30%
I only have broadband. I do not have other communications services from any other provider (e.g. fixed phone, mobile phone)	4%	2%	8%	4%	17%	3%	0%	0%
Don't know	2%	2%	2%	3%	0%	0%	3%	18%

*Base small

64% of business broadband users claim to bundle their broadband service.

Services included Within Broadband Bundles – Bundle Users

(Base: Total Broadband Users Who Use Service In A Bundle, n = 560)

Q.28 Including your broadband services which of the following services are also included on your single bill?

Primary Mode of Access

	Total (n=560)	BB Fixed Landline (n=414)	BB Fibre Network (n=69)	BB Cable Network (n=36*)	Mobile BB (n=16*)	Fixed Wireless (n=17*)
Fixed phone	78%	81%	80%	76%	21%	75%
Fixed phone & Mobile phone	18%	18%	18%	8%	38%	15%
Mobile phone	2%	1%	0	0	41%	0
Other	2%	1%	2%	13%	0	0
Don't know	1%	0	0	3%	0	10%

*Base small

BB Satellite (n=3) and Mobile Phone Access (n=4) base too small to show

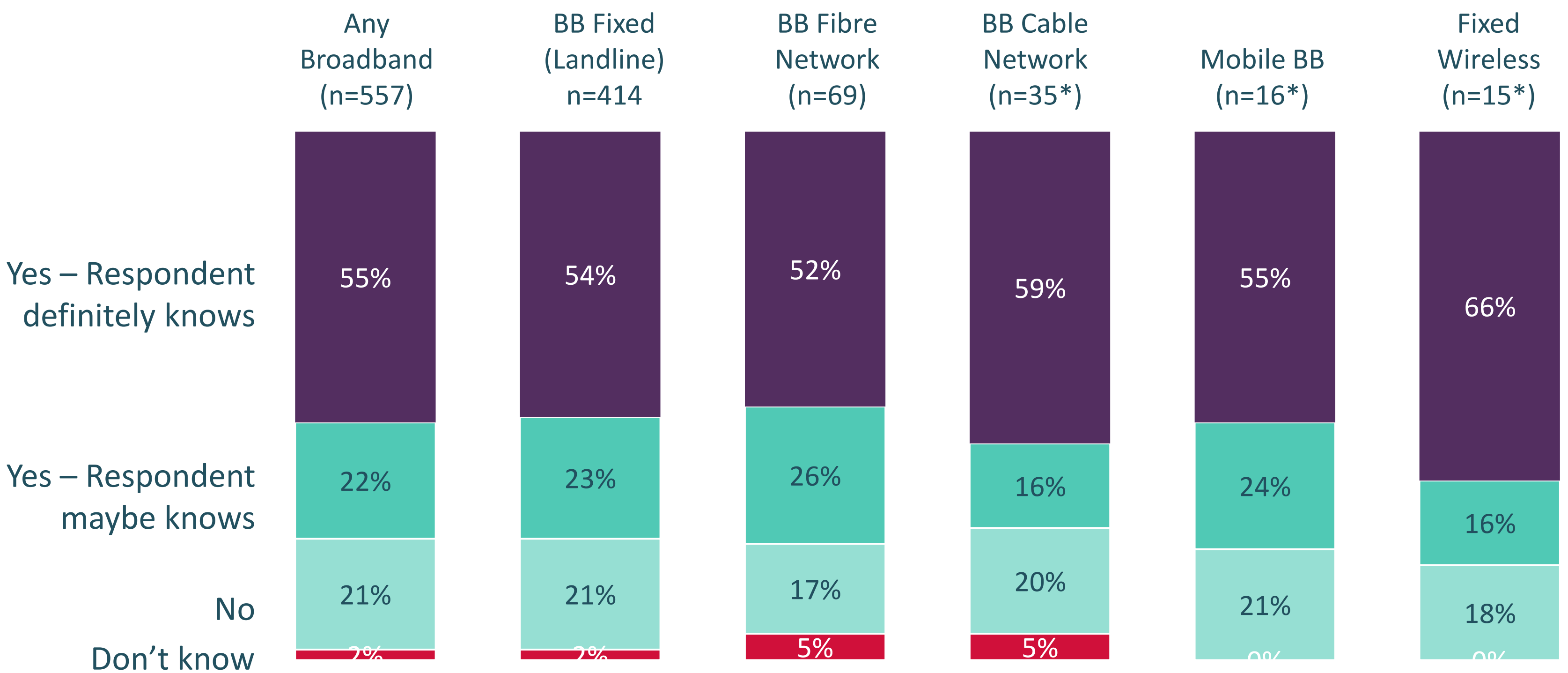
At 78%, the majority of broadband bundles have a fixed phone only included as part of the package with 18% having fixed phone and mobile phones.

Awareness of Cost of Services – Bundle Users

(Base: Total Broadband Users Who Use Service In A Bundle Which They Know What Is Included, n = 557)

Q.29 Do you know how much your business pays for your combined service on a monthly basis?

Primary Mode of Access



Total: Yes	77%	77%	78%	75%	79%	82%

BB Satellite (n=3) and Mobile Phone Access (n=4) base too small to show

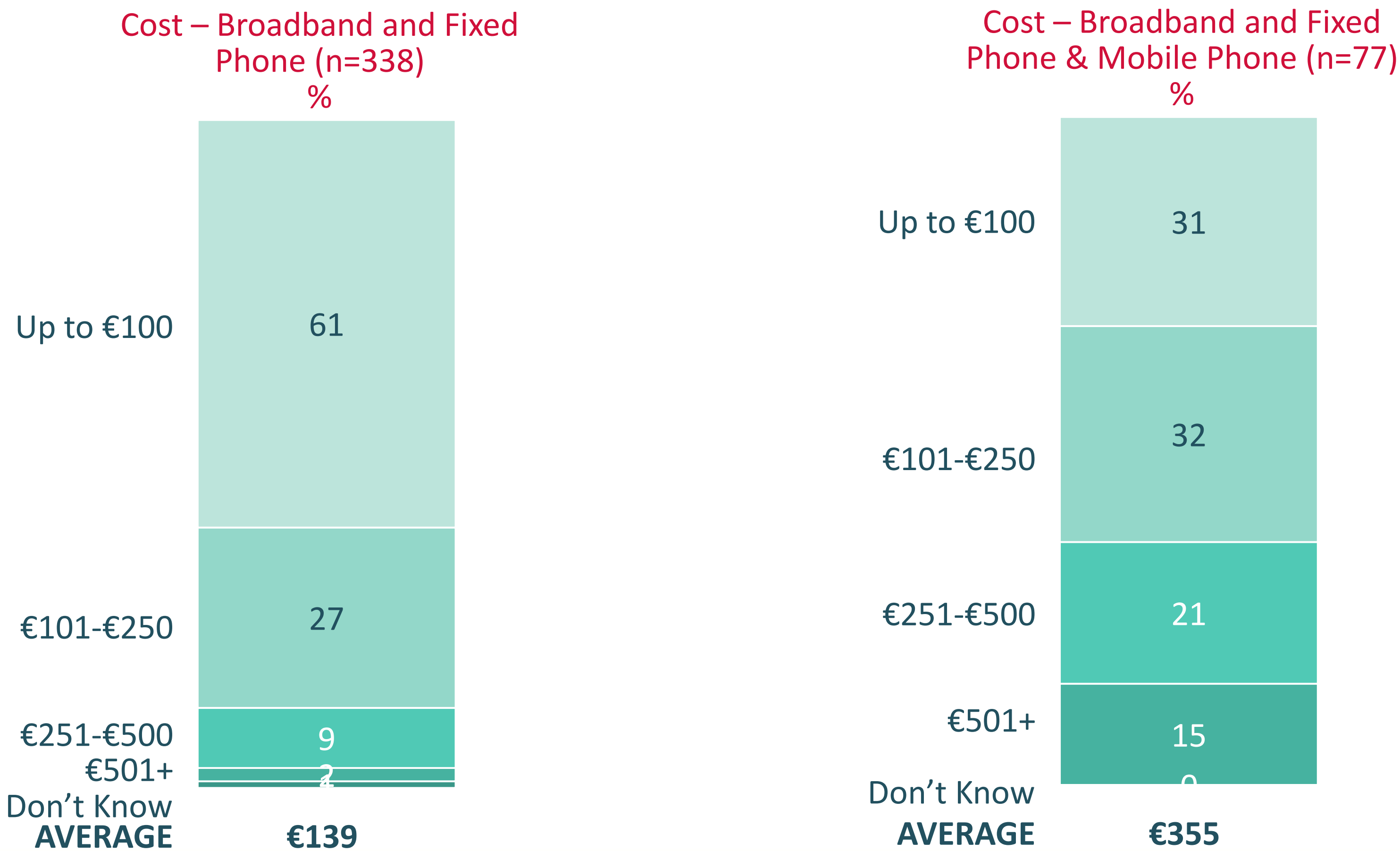
*Base small

77% of those with fixed broadband via landline and 78% of those with broadband via fibre claim to know the cost of their services.

Typical Spend Per Month - Bundle Users

(Base: All Broadband/Fixed Phone Bundle – n=338. BB/Fixed & Mobile Phone – n=77)

Q.30 How much does your business typically pay for this combined package .... of services per month (excluding any promotional\ introductory offers)?



Other Bundle types base too small to show

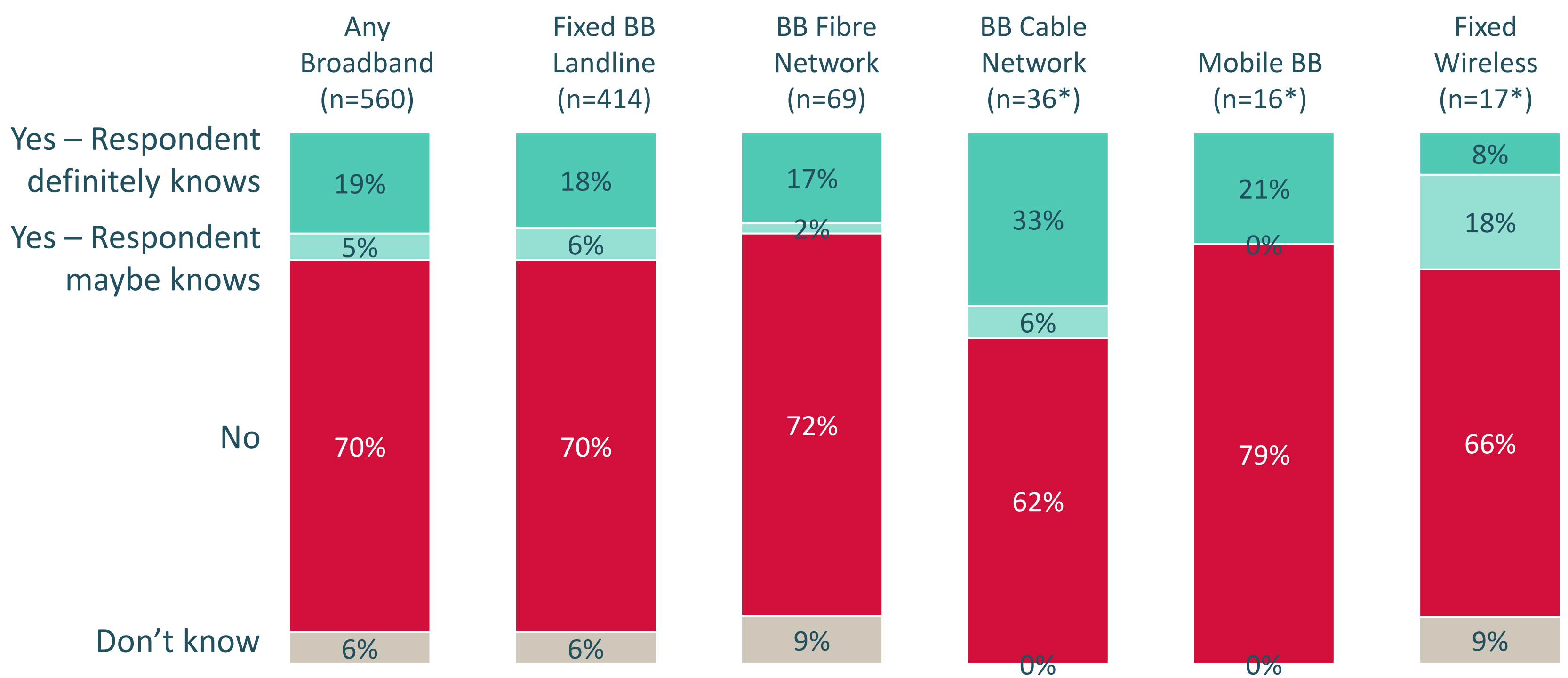
For the most common bundle "broadband and fixed phone", the average cost is €139, with 61% of bundles costing less than €100.

Knowledge of Additional Costs to Bundle Broadband Services – Bundle Users

(Base: Total Broadband Users Who Use Service In A Bundle, n = 560)

Q.31/89 Does the monthly amount you pay for your services include any additional charges (e.g. usage charges, out of package calls charges etc?)

Primary Mode of Access



Total: Yes	24%	24%	19%	38%	21%	26%

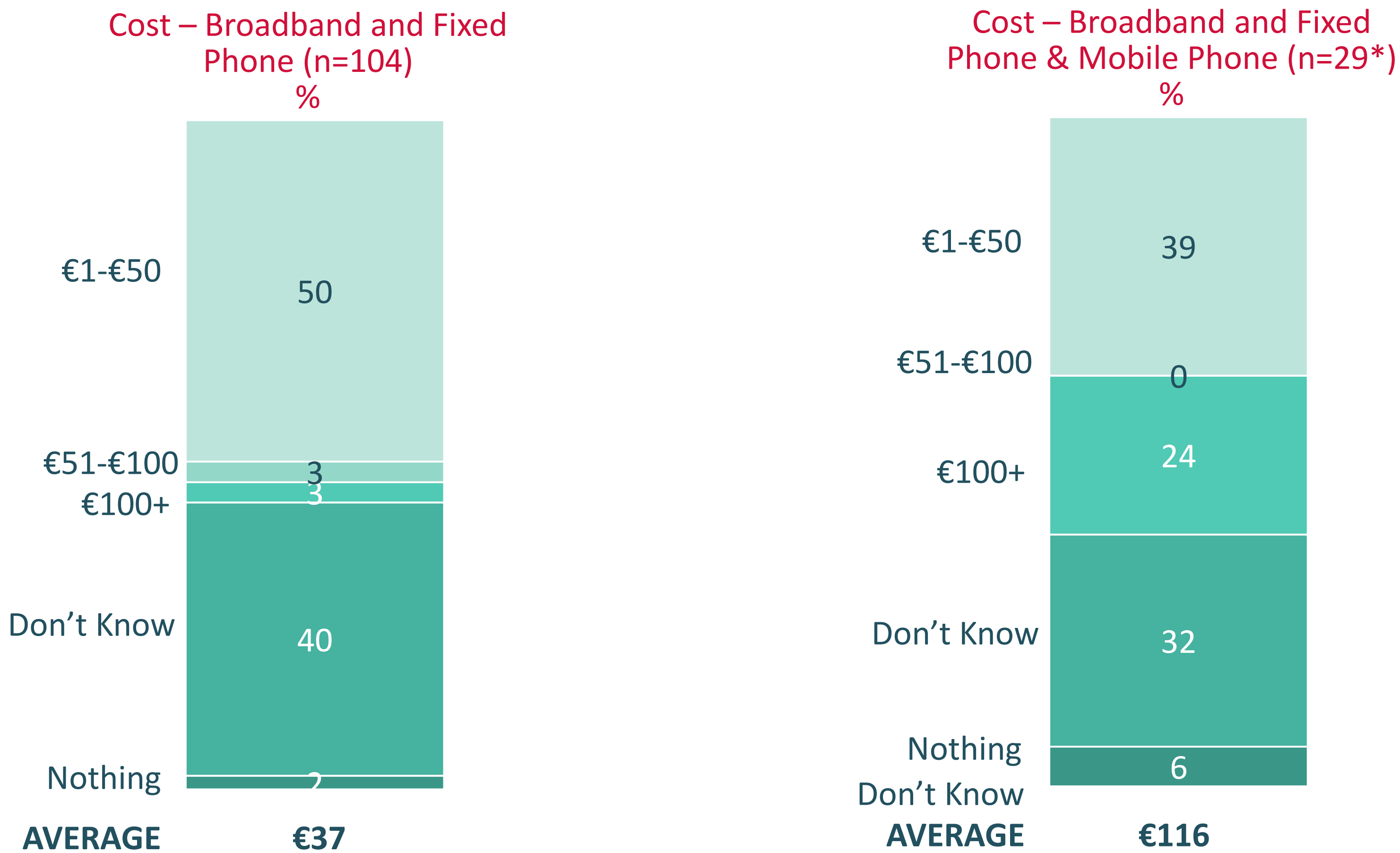
Base: BB Satellite (3) and Mobile Phone Access (4) base too small to show
*Caution Small Base

24% of broadband users stated that their bundle includes additional charges.

Typical Spend Per Month (Additional Charges)-Bundle Users

(Base: All Broadband/Fixed Phone Bundle who know additional charge– n=104. BB/Fixed & Mobile Phone – n=29)

Q.30 How much does your business typically pay for this combined package .... of services per month (excluding any promotional\ introductory offers)?



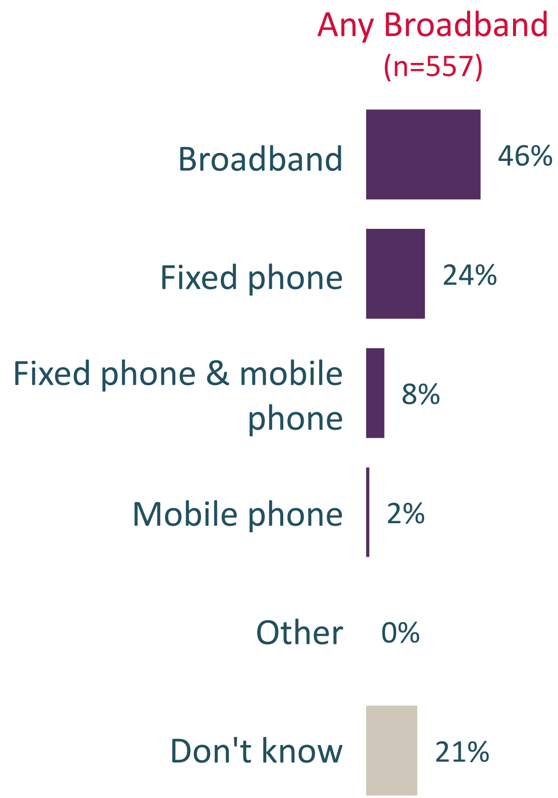
* Small base

The average additional cost for bundle users per month within a broadband and fixed phone bundle is €37.

Most Important Service within Bundle - Broadband Users

Base: All respondents who use data connectivity services in a bundle and know what is included, n = 557)

Q.33 Which service in the bundle/package you subscribe to is most important to your business? Please answer on a scale where 5 is very important and 1 is not at all important



	Primary Mode of Access				
	BB Fixed Landline (n=414)	BB Fibre Network (n=69)	BB Cable Network (n=35*)	Mobile BB (n=16*)	Fixed Wireless (n=15*)
Broadband	43	54	64	56	45
Fixed phone	29	19	3	10	0
Fixed phone & mobile phone	8	7	3	26	10
Mobile phone	2	0	0	0	0
Other	0	0	5	0	0
Don't know	20	21	25	9	46

*Caution Small Base

Base: BB Satellite (3) and Mobile Phone Access (4) base too small to show

Broadband at 46% is considered the most important service within the bundle, followed by fixed phone at 24%.

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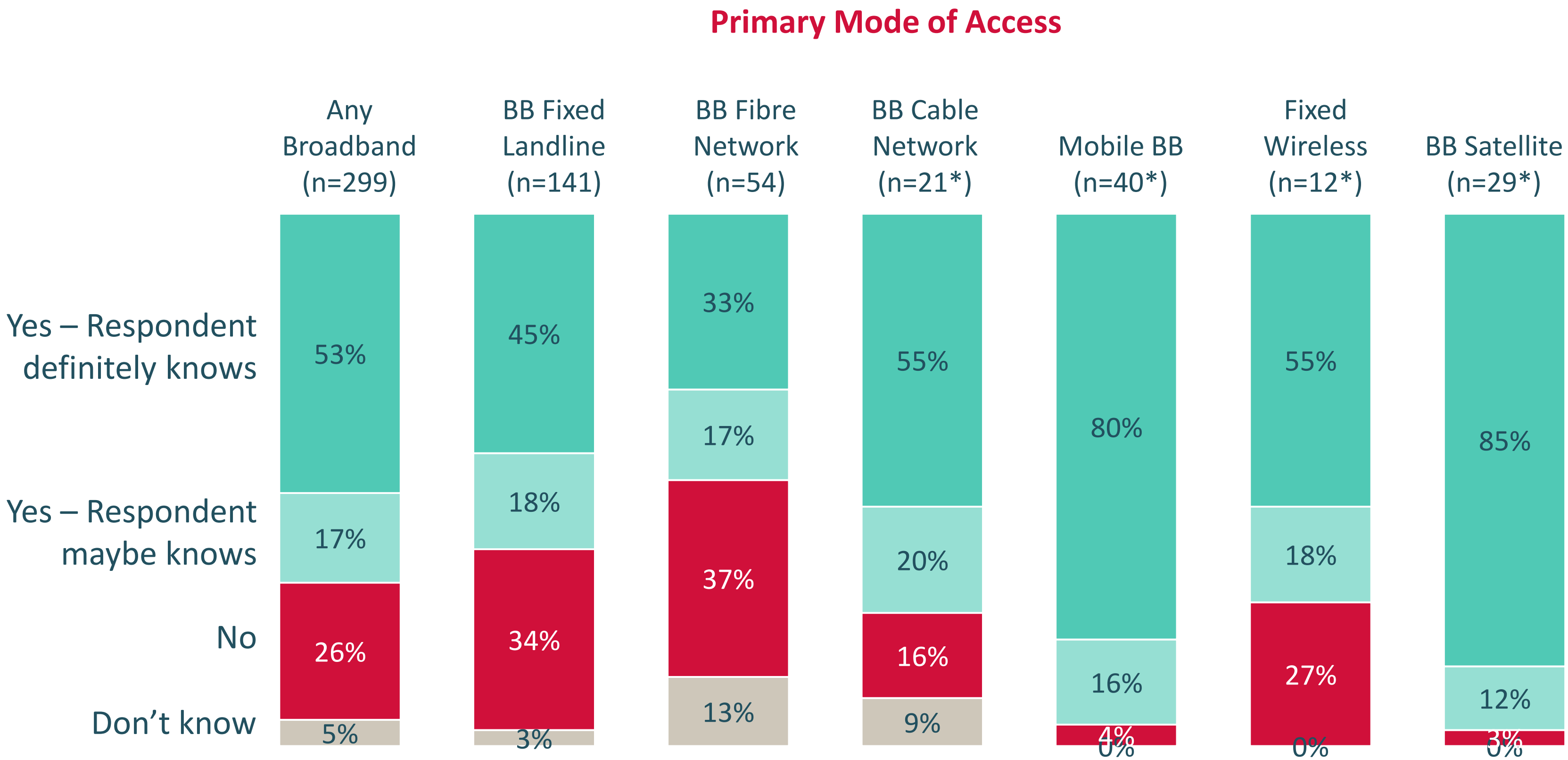
Awareness of Cost of Services – Non Bundle Users

(Base: Total Broadband Users Who Use Service Not In A Bundle n = 299)

Q.34 Do you know how much your business pays for your broadband service on a monthly basis?



Total: Yes	70%	64%	50%	75%	96%	73%	97%

*Caution Small Base

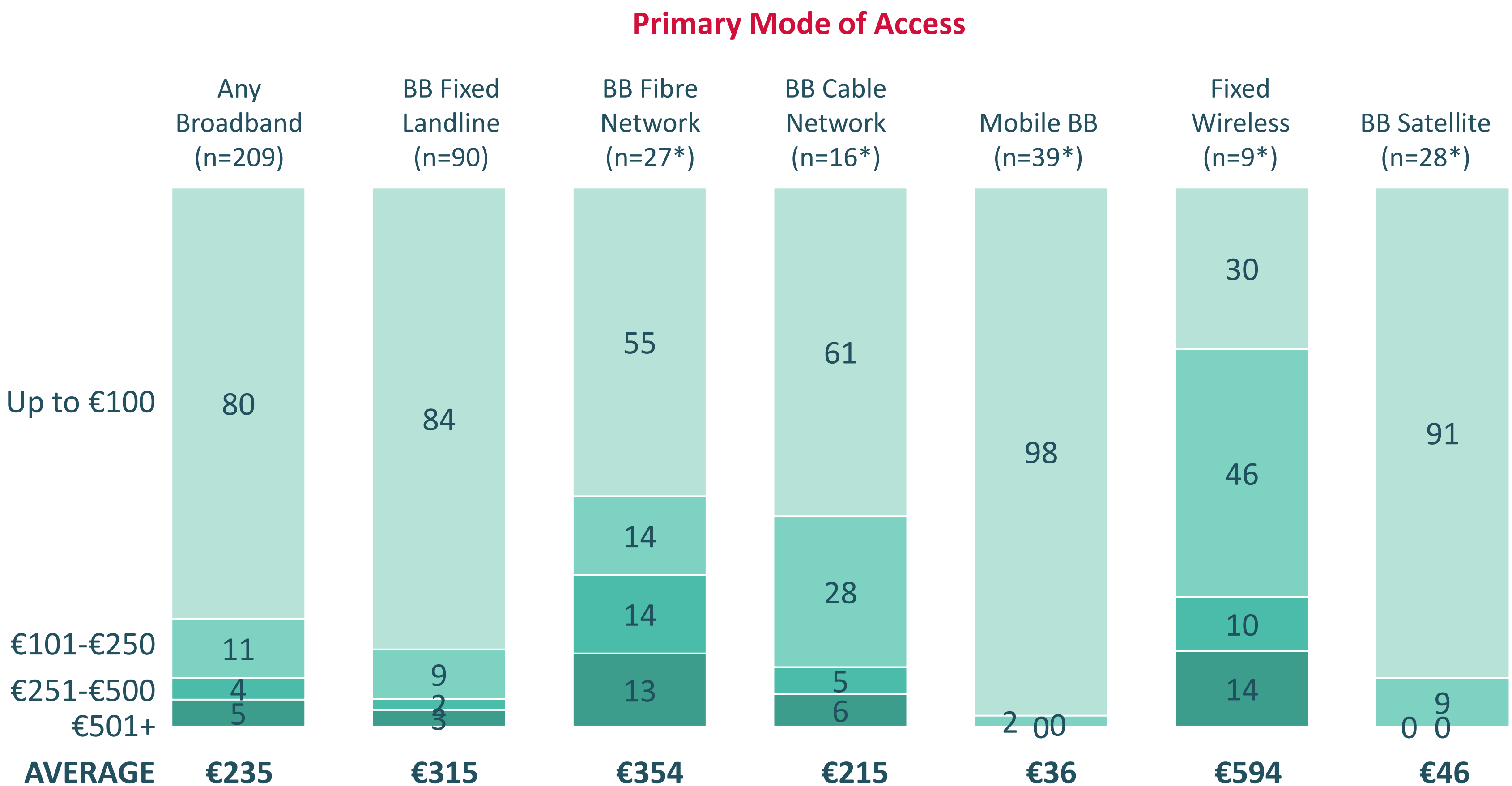
*Access over Mobile Phone too small to show (2)

At 70%, non bundle broadband customers have a lower on average awareness of the cost of services than bundle customers (77%).

Typical Broadband Spend Per Month – Non Bundle Users

(Base: Total Broadband Users Who Use Service Not In A Bundle And Know Cost, n=209)

Q.35/Q.93 Excluding any short term introductory offers, typically how much do you pay for this service each month?



*Caution Small Base

Access over mobile phone base too small to show (1)

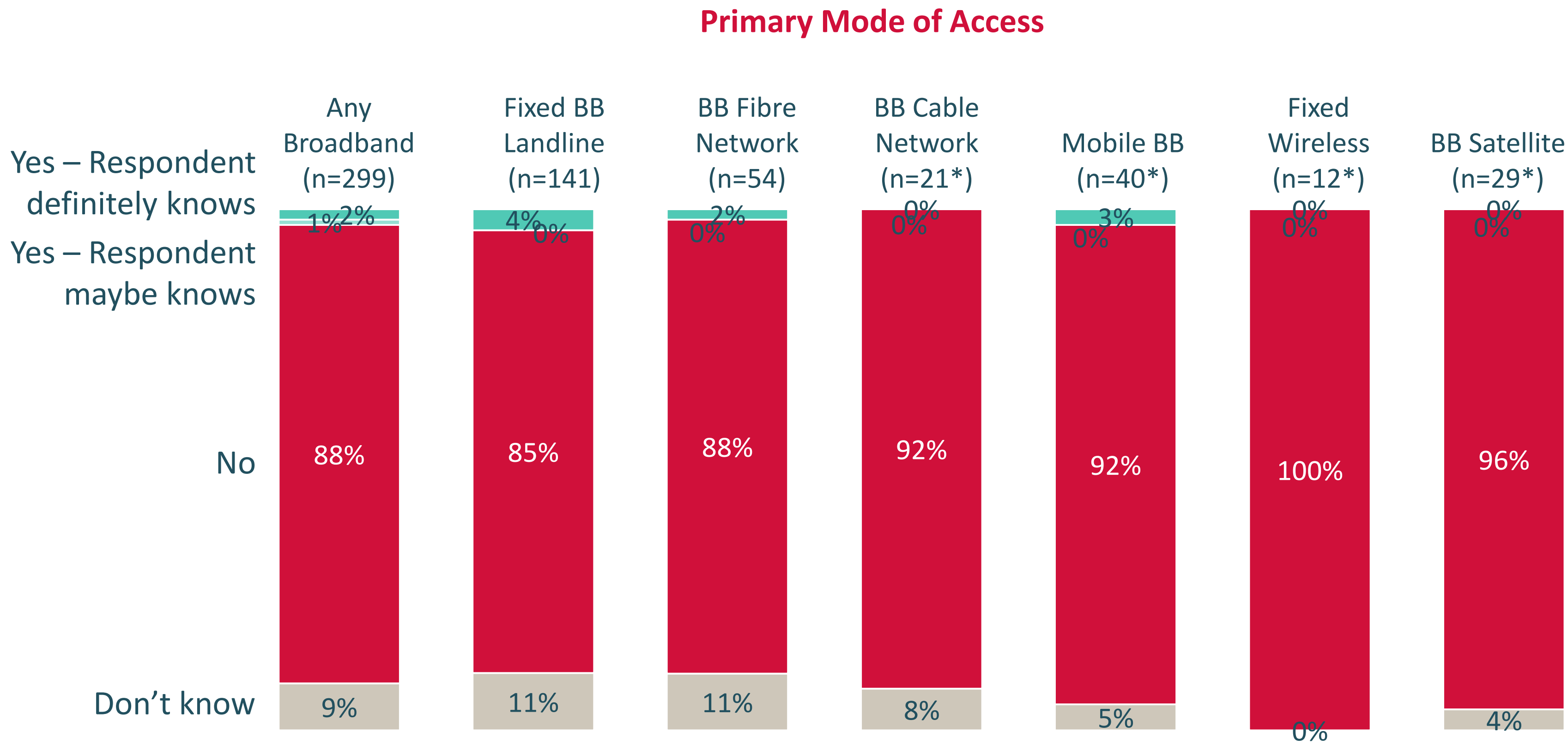
The average cost of non bundled Broadband is €235, although 80% of customers claim to pay less than €100.

(Q.35/93)

Knowledge of Additional Cost to Broadband Charges – Non Bundle Users

(Base: Total Broadband Users Who Use Service Not In A Bundle, n = 299)

Q.36/Q.94	Does the amount you pay for your broadband service include any additional charges (e.g. excess download charges etc?)



Total: Yes	3%	5%	2%	0%	3%	0%	0%

*Caution Small Base

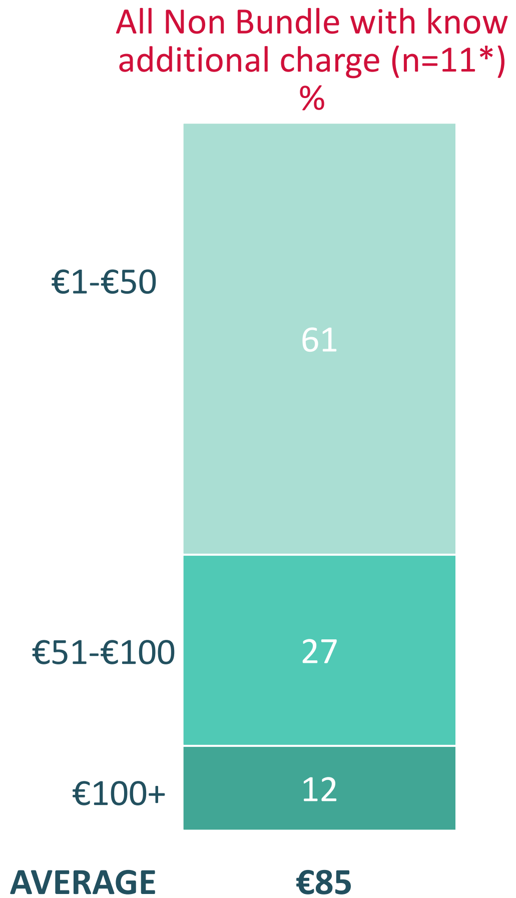
*Access over Mobile Phone too small to show (2)

Awareness of additional monthly cost to broadband charges among non bundle users is very low at 3%.

Typical Spend Per Month (Additional Charges)- Non Bundle Users

(Base: All non bundle who know additional charge– n=11*)

Q.37 If your business incurs any additional usage charges above the typical amount per month for your broadband service, can you estimate the cost of these additional charges?



* Small base on this slide

The average additional cost per month for non bundle broadband users is €85. The base of companies is very small at this question.

REDC

Reason for not Bundling - Broadband Users

(Base: Total broadband users who use service not in a bundle n=274)

Q.38 Why did your business choose to purchase your broadband service independent of your other communication services (telephone, mobile phones etc.?)

	Total Broadband (274)	Primary Mode of Access					
		BB Fixed Landline (n=130)	BB Fibre Network (n=44*)	BB Cable Network (n=18*)	Mobile BB (n=31*)	Fixed Wireless (n=11*)	BB Satellite (n=29*)
Preferred to have separate service providers for services	19%	21%	23%	35%	7%	15%	4%
Broadband service provider does not offer other services to bundle my\our broadband with	16%	11%	15%	21%	24%	11%	32%
Value for money\ Good deal	15%	17%	14%	14%	8%	19%	8%
Better service\ coverage	12%	8%	5%	20%	24%	0	29%
Only required broadband service	11%	12%	5%	9%	12%	21%	12%
Did not know I\we could bundle broadband with other services	7%	8%	3%	5%	10%	0	4%
Unwilling to switch service providers to bundle services together	4%	5%	2%	6%	7%	2%	0
No choice in the decision	2%	0	7%	7%	4%	0	0
Always been this way\ Historic	2%	3%	4%	0	0	0	0
More reliable service\ Old provider is unreliable	2%	3%	2%	0	0	0	0
Other	16%	12%	31%	17%	4%	48%	14%
Don't know	8%	12%	4%	0%	3%	13%	0

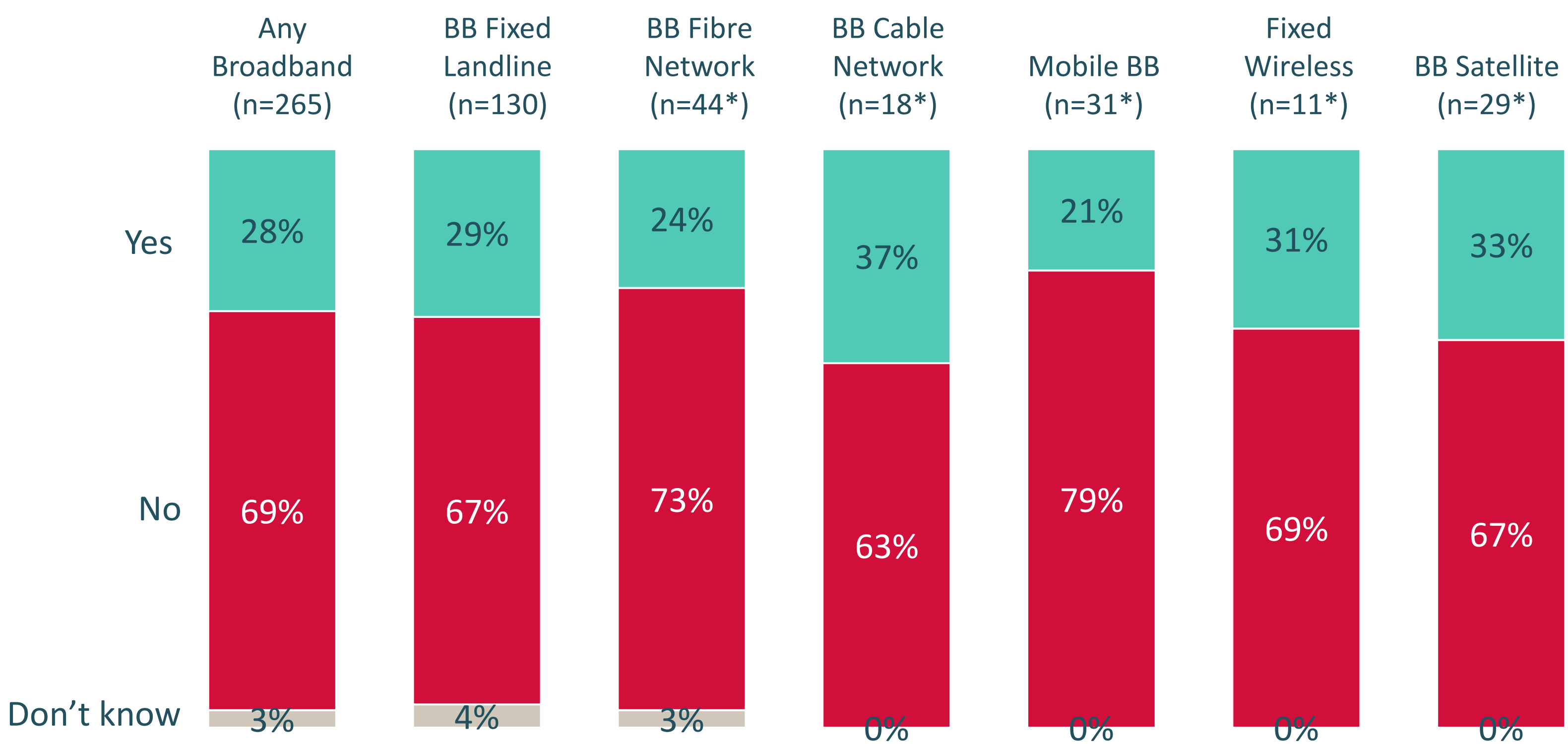
*Caution Small Base
*Mobile Phone too small to show (2)

A preference to use different providers for various telecommunications services is the number one reason to not bundle (19%), followed closely by lack of bundle availability from current broadband service providers (16%).

Non Bundle Users - Previously Bundled Services

(Base: Total Broadband Users Who Use Service Not In A Bundle, n=274)

Q.39/Q.97 Did your business previously purchase broadband with other services in a bundle?



*Caution Small Base
*Mobile Phone too small to show (2)

28% of non bundle holders previously bundled services, with users least likely to have done so.

Previously Bundled Services, What was included

(Base: Total Broadband Users Who Use A Service Not In A Bundle And Previously Purchased Service Bundle – n=74)

Q.39b/Q.97b What services were included in your bundle?

	Total Broadband (n=74)	Primary Mode of Access				
		BB Fixed Landline (n=37*)	Bb Fibre Network (n=10*)	BB Cable Network (n=7*)	Mobile BB (n=6)	BB Satellite (n=9)
Broadband & Fixed phone	71%	81%	77%	100%	26%	28%
Broadband & Fixed phone & mobile phone	14%	11%	11%	0%	23%	40%
Broadband & Mobile phone	7%	3%	12%	0%	22%	17%
Other	2%	0%	0%	0%	0%	15%
Don't know	5%	5%	0%	0%	29%	0%

*Caution small base

*Fixed Wireless Base too small to show

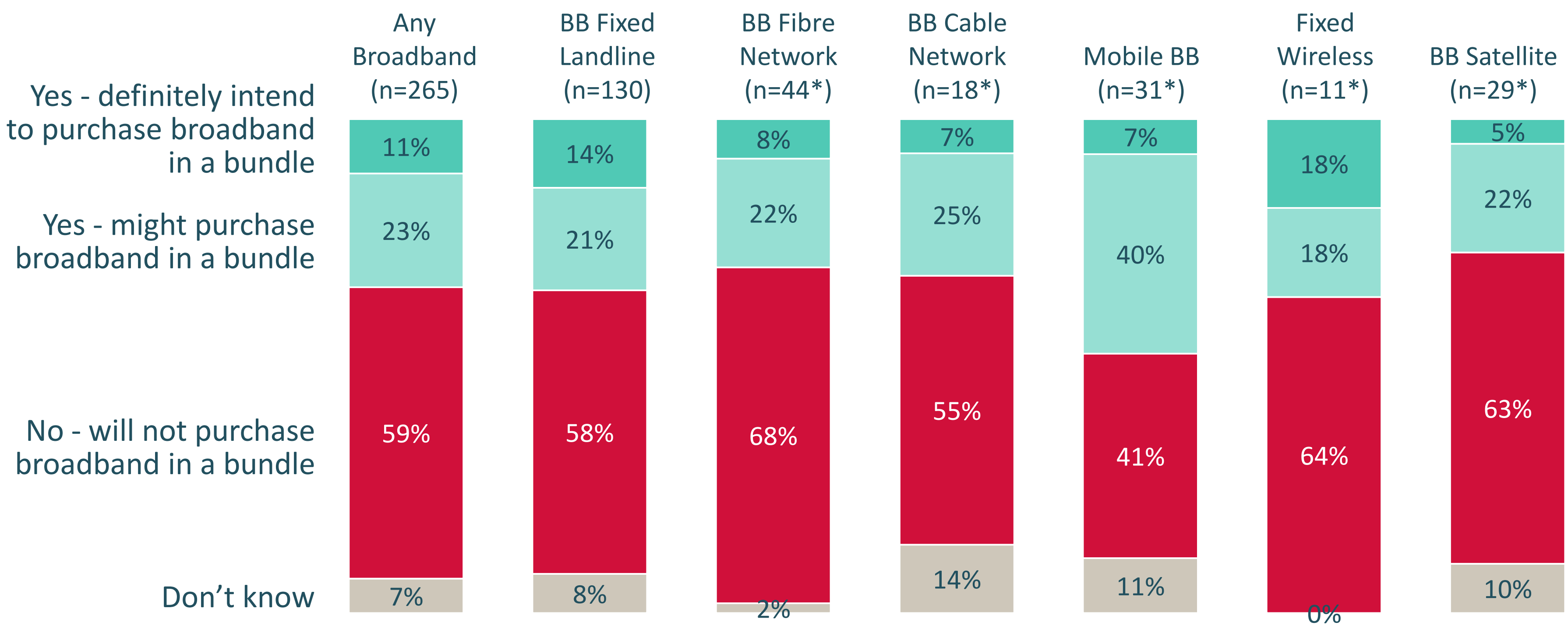
The most common previously held bundle is broadband and fixed phone (71%), followed by broadband, fixed phone and mobile phone (14%).

REDC

Non Bundle Users - Intention to Bundle

(Base: Total Broadband Users Who Use A Service Not In A Bundle, n = 265)

Q.40/Q.98 Does your business intend to purchase your broadband service as part of a broader package with other services over the next 12 months – i.e. receive a single bill for 2 or more services from one service provider?



Total: Yes	34%	34%	30%	32%	48%	36%	27%

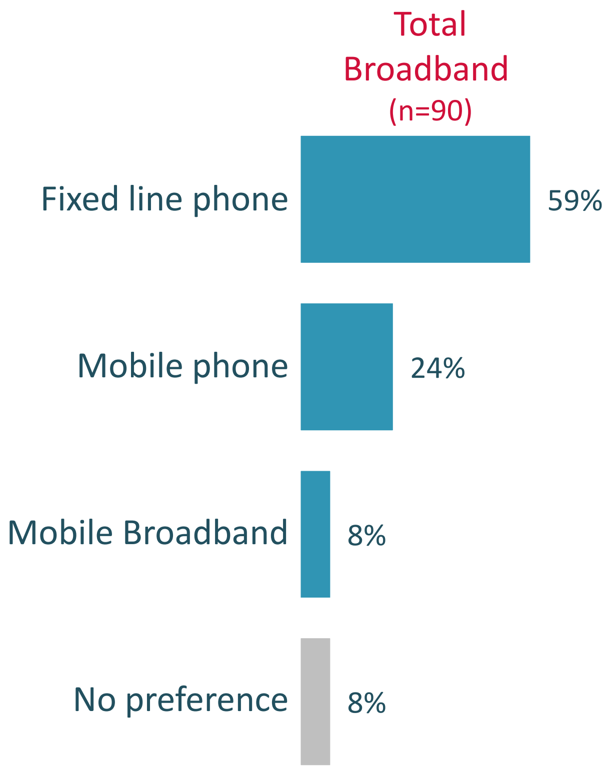
*Caution Small Base
*Mobile Phone too small to show (n=2)

34% of broadband users say they intend to bundle in future, but it is worth noting that just 11% say they definitely intend to purchase.

Non Bundle Holders - What They Intend To Purchase

(Base: All Broadband users who are not in a bundle and intend to purchase a bundle, n =90)

Q.41 Which of the following services would you be most willing to bundle with your broadband?



Primary Mode of Access				
BB Fixed Landline (n=44*)	BB Fibre Network (n=13)	BB Cable Network (n=6)	Mobile BB (n=15)	BB Satellite (n=8)
73%	43%	46%	31%	62%
16%	28%	31%	48%	20%
6%	17%	23%	8%	0%
5%	13%	0%	13%	17%

*Caution Small Base
*Access over Mobile Phone(n=0)/Fixed wireless connection(n=4) too small to show

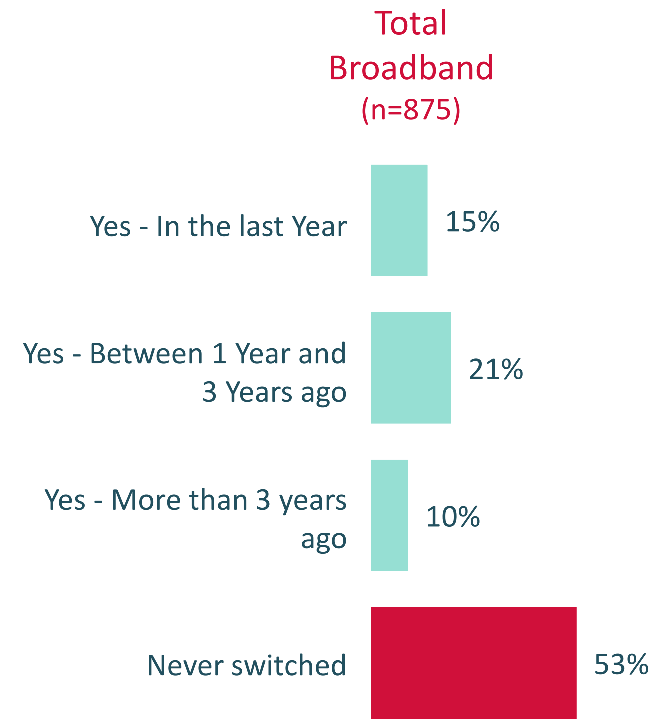
Of those non bundle broadband holders who intend to purchase a bundle in future, 59% say they would be most willing to bundle a fixed line phone with their broadband service.

Switching
(Broadband)

Incidence of Switching

(Base: Total Broadband Users, N= 875)

Q.42/Q.100 Have you ever switched your broadband service provider or from a leased line service provider?



	Primary Mode of Access						
	BB Fixed Landline (n=566)	BB Fibre Network (n=125)	BB Cable Network (n=59)	Mobile BB (n=57)	Fixed Wireless (n=29*)	BB Satellite (n=33*)	Mobile Phone* (n=7*)
Yes - In the last Year	17%	15%	18%	24%	1%	15%	0%
Yes - Between 1 Year and 3 Years ago	22%	16%	24%	21%	24%	15%	11%
Yes - More than 3 years ago	9%	14%	19%	5%	25%	13%	0%
Never switched	53%	55%	40%	50%	50%	58%	89%

*Caution Small Base

47% of broadband users have ever switched provider at some point in time, with most (21%) having switched between 1 year and 3 years ago.

Switchers - Previous Means of Access

(Base: Total Broadband Users Who Have Switched Provider, n=413)

Q.43/Q.101 Thinking about your previous broadband or leased line service provider which means of accessing the internet did you previously use?

	Total Broadband Switchers (n=413)	Current Primary Mode of Access					
		BB Fixed Landline (n=264)	BB Fibre Network (n=57)	BB Cable Network (n=35*)	Mobile BB (n=28*)	Fixed Wireless (n=14*)	BB Satellite (n=14*)
Broadband	96%	96%	96%	90%	100%	100%	100%
Fixed broadband (Landline)	81%	87%	74%	67%	58%	100%	64%
3G\4G Mobile Broadband	6%	5%	4%	0%	24%	0%	21%
Broadband provided by Satellite	4%	2%	0%	10%	9%	0%	17%
Fixed broadband (Fibre)	3%	1%	19%	0%	3%	0%	0%
Fixed broadband (Cable)	2%	0%	1%	14%	5%	0%	0%
Internet access over Mobile Phone using 3G\4G data package (non Wi-Fi)	1%	1%	3%	0%	4%	0%	0%
Fixed BB (Wireless Connection)	0%	0%	2%	0%	0%	0%	0%
Any other form of broadband connection	1%	1%	2%	0%	0%	0%	8%
Leased Line Options	8%	6%	18%	12%	0%	0%	5%
Analogue leased lines	5%	4%	11%	8%	0%	0%	5%
Digital leased lines	2%	1%	7%	5%	0%	0%	5%
Other incl. Wavelength Connectivity	1%	2%	2%	3%	0%	0%	0%
Ethernet Leased Line	0%	0%	2%	1%	0%	0%	0%
Don't know	2%	3%	0%	9%	0%	0%	0%

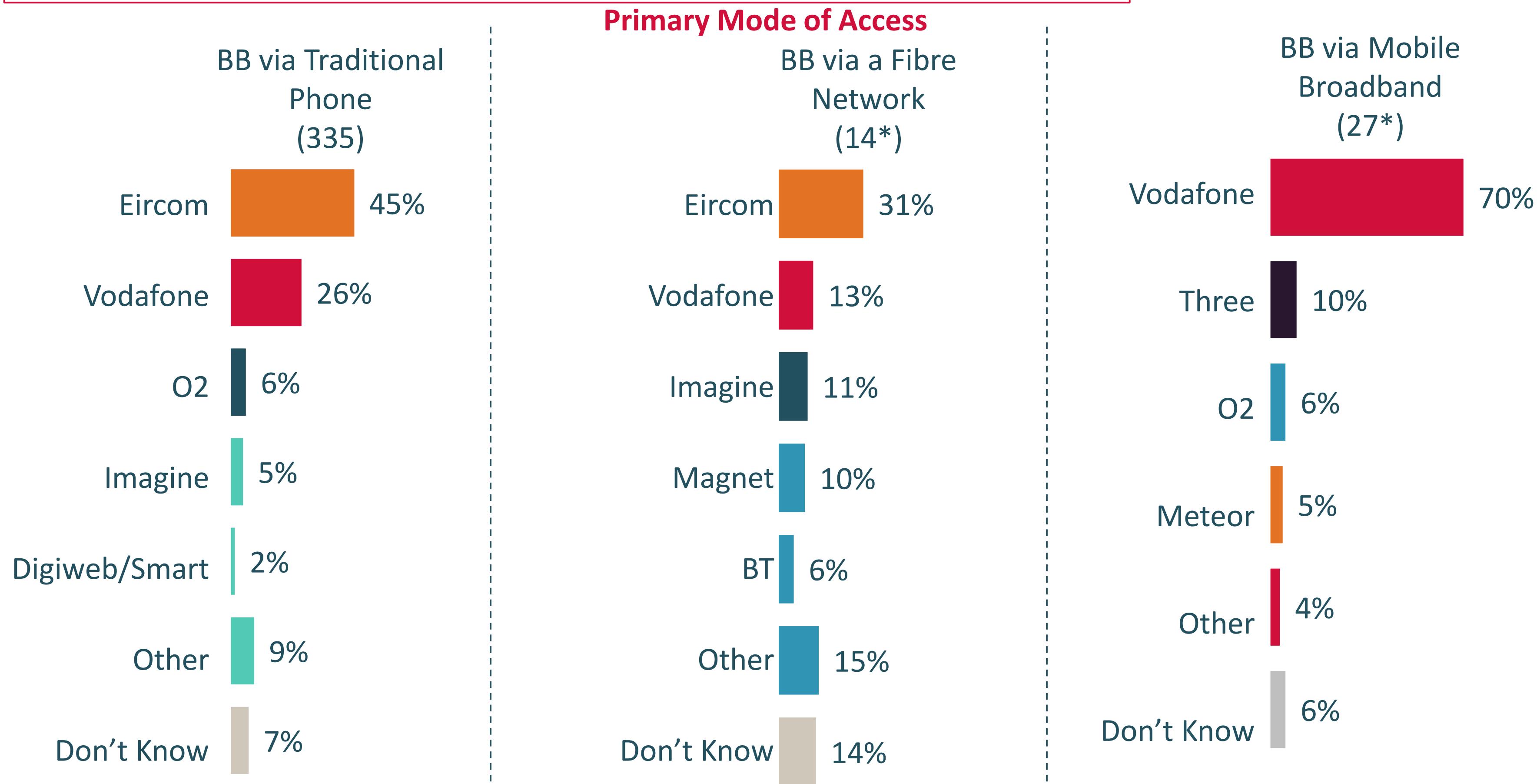
*Caution Small Base

A majority of broadband switchers appear to have switched from broadband, with just 8% having switched from leased line.

Previous Platform Used and Provider Share

(Base: All Broadband Switchers within previous platform)

Q.44 What service provider previously provided your business with your last broadband service?



*Other access platforms too small to show

Many fixed landline and fibre network broadband switchers previously used Eircom as their provider, while the majority of mobile broadband customers switched from Vodafone.

Switchers - Importance in Decision to Switch

(Base: Broadband users who have switched provider, n = 413)

Q.45/103 How important where any of these options were in your decision to switch.?

	Degree of availability (% time service is working)	Bandwidth download speed	Bandwidth upload speed	Range	Resilience	Contention	Synchronis ation	Symmetry	Latency	Jitter
Very important	63%	54%	48%	41%	39%	35%	29%	30%	26%	25%
Important	14%	20%	20%	19%	20%	19%	24%	21%	20%	18%
Neither	10%	14%	17%	16%	18%	23%	21%	23%	22%	25%
Somewhat unimportant	2%	4%	5%	8%	5%	5%	7%	6%	8%	7%
Not at all important	8%	7%	8%	13%	13%	12%	12%	13%	13%	13%
Don’t know	3%	2%	2%	3%	5%	5%	7%	6%	10%	12%
Total: Important	77%	74%	68%	60%	59%	54%	53%	51%	46%	43%

Degree of Availability (% of time services is working) was the most important factor in broadband switching decision making with jitter the least important.

Switchers - Importance in Decision to Switch

(Base: Total Broadband Users Who Have Switched Provider – n=413)

Q.45/Q.103 How important were these options in your decision to switch?

	Total Broadband (n=413)	Primary Mode of Access					
		BB Fixed Landline (n=264)	BB Fibre Network (n=57)	BB Cable Network (n=35*)	Mobile BB (n=28*)	Fixed Wireless (n=14*)	BB Satellite (n=14*)
Degree of availability (% time service is working)	77%	78%	80%	88%	70%	56%	79%
Bandwidth download speed	74%	71%	78%	91%	69%	56%	85%
Bandwidth upload speed	68%	66%	73%	81%	68%	56%	62%
Range	60%	57%	62%	78%	69%	51%	67%
Resilience	59%	57%	66%	77%	49%	54%	57%
Contention	54%	52%	54%	75%	46%	66%	57%
Synchronisation	53%	50%	55%	72%	52%	49%	57%
Symmetry	51%	47%	55%	74%	58%	51%	50%
Latency	46%	42%	50%	66%	50%	56%	50%
Jitter	43%	39%	42%	60%	47%	64%	51%

*Caution Small Base

*Access through Mobile Phone base too small to show (1)

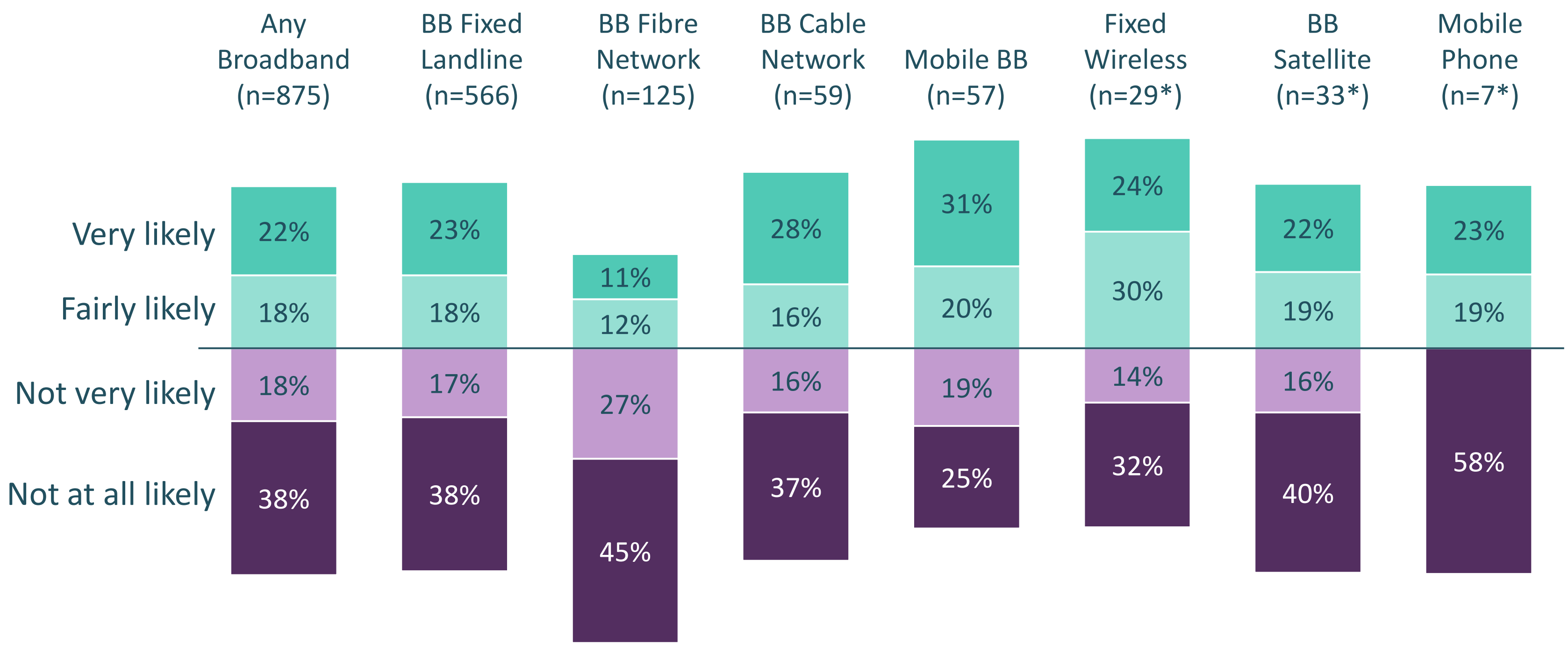
The importance of the degree of availability (% of time service is working) is evident across all modes of access, particularly for fibre and cable users.

Likelihood to Switch - Next 12 - 18 Months

(Base: Total Broadband Users, n=875)

Q.46/Q.104 How likely are you to consider switching broadband service provider within the next 12 - 18 months?

Primary Mode of Access



	Any Broadband	BB Fixed Landline	BB Fibre Network	BB Cable Network	Mobile BB	Fixed Wireless	BB Satellite	Mobile Phone
Don't know	3%	3%	4%	3%	5%	-%	4%	-%
Total: Likely	40%	42%	24%	44%	52%	54%	40%	42%

*Caution Small Base

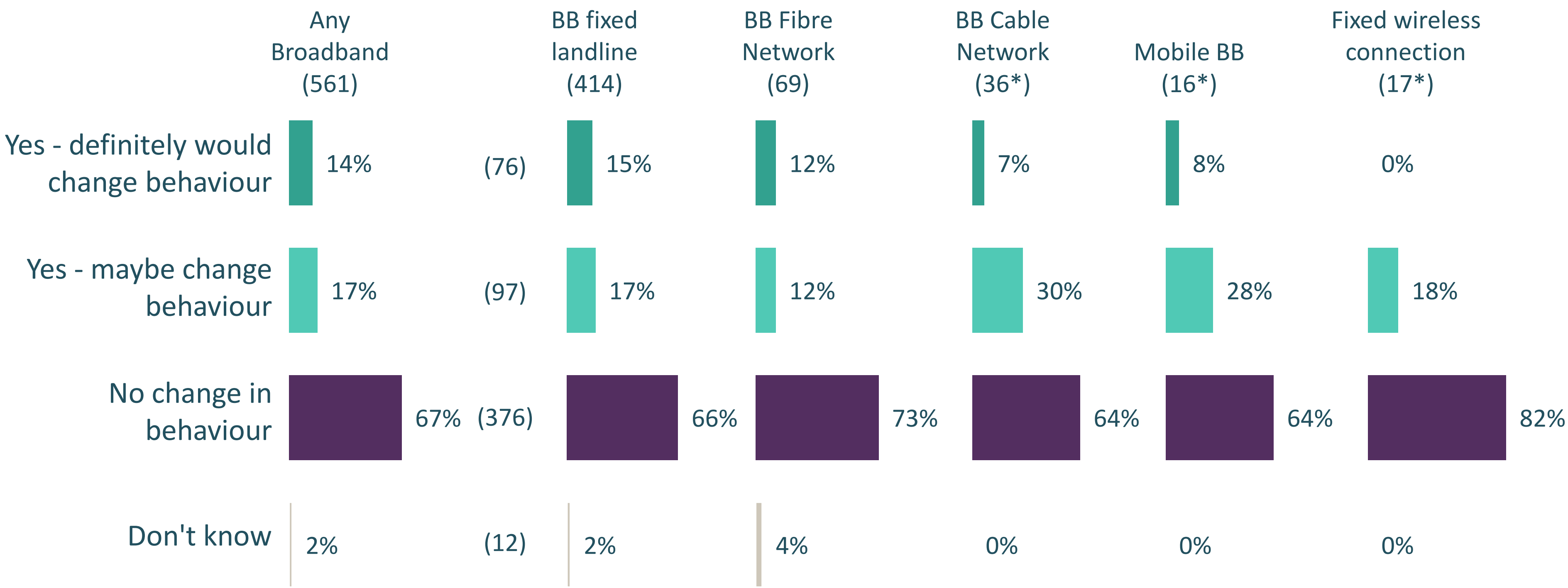
40% of broadband users are likely to switch in the next 12 – 18 months, with fibre network broadband users less likely to do so at 24%.

SSNIP (Broadband Bundle Users)

Response to €2 Price Increases in Broadband Portion of Bundle

(Base: Any Broadband Bundle owners – 561)

Q.S.1/Q.S6 Do you believe that your business would change your actual purchasing behaviour with respect to your broadband service?



( ) Figures in brackets relate to total actual figures

* - Small Base:
Mobile Phone n=4, Satellite n=3

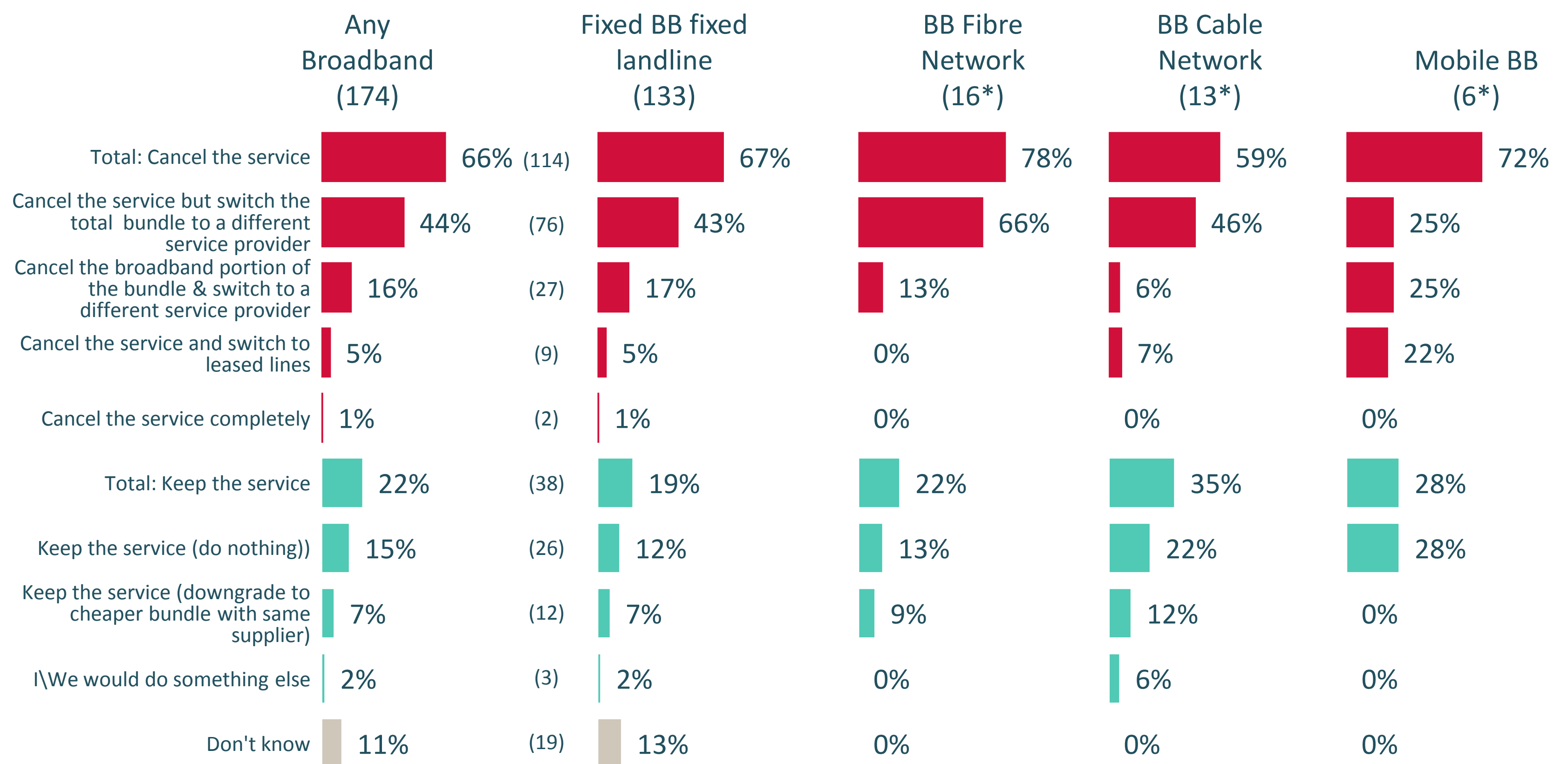
31% of broadband bundle business claim they would change behaviour given a €2 increase in the broadband portion of their bundle cost

REDC

Response to €2 price increases – Broadband Bundle

(Base: All broadband bundle who would change behaviour – n=174)

Q.S2 Which of the following would describe what your business would be most likely to do in response to this hypothetical €2 price increase of your broadband service?



( ) Figures in brackets relate to total actual figures

* - Small Base

Fixed Wire n=3, Satellite n=0, Mobile Phone n =1

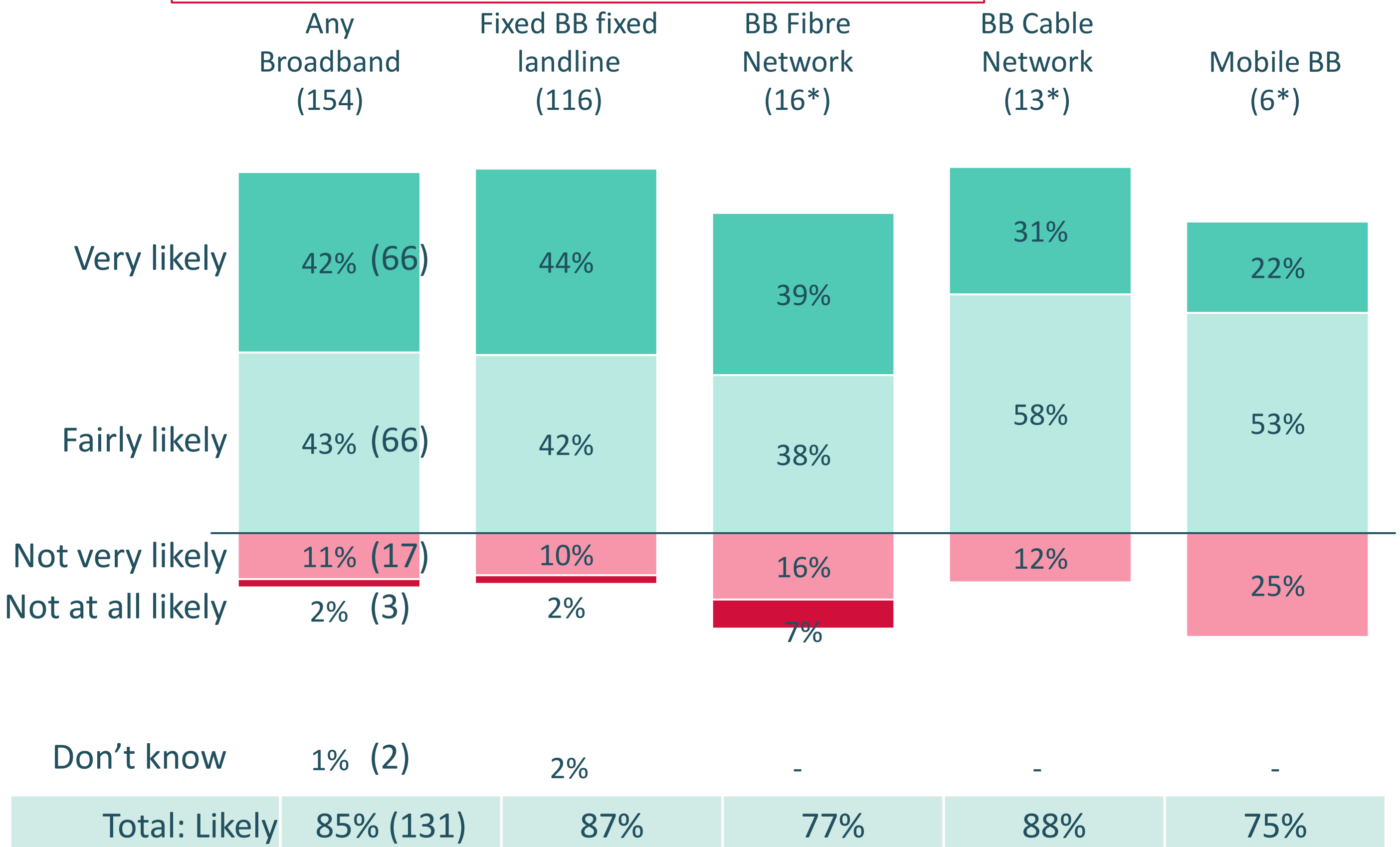
66% of broadband bundle businesses who will change behaviour are likely to cancel the service they have given a €2 price increase

REDC

Likelihood To Follow Through With Any Change In Behaviour – Broadband Bundle Owners

(Base: All Broadband Bundle who would change behaviour – n=154)

Q.S3 How likely is your business to carry out any of the stated actions



( ) Figures in brackets relate to total actual figures

* Small Base

Fixed Wire n=1, Satellite n=0, Mobile Phone n =1

85% of broadband bundle businesses who will keep/switch broadband given €2 increase state they are likely to do this.

Service Likely to Switch To – Broadband Bundle Switchers

(Base: All Broadband Bundle and are likely to switch after price change –n=93)

Q.S4 You have just said that you would _____ meaning you would give up your __. Which type of broadband or leased line service would your business be most likely to switch to?

	Any Broadband (93)		Fixed BB fixed landline (74)	BB Fibre Network (7*)	BB Cable Network (9*)
Total: Broadband	59%	(55)	57%	53%	73%
Switch to a broadband service provided by a Fibre service provider	25%	(23)	28%	14%	15%
Switch to a broadband service provided by Satellite	12%	(12)	11%	0%	18%
Switch to a broadband service provided over a traditional fixed telephone line	7%	(6)	0%	39%	40%
Switch to a broadband service provided by a TV cable service provider	6%	(5)	5%	0%	0%
Switch to using my mobile phone for internet access instead	5%	(5)	7%	0%	0%
Switch to using mobile phone for internet access	5%	(4)	6%	0%	0%
Total: Leased line	3%	(3)	4%	0%	0%
I\we would do something else	12%	(11)	13%	29%	0%
Don't know	25%	(24)	27%	18%	27%

( ) Figures in brackets relate to total actual figures

Small Base: Mobile Broadband =1, Fixed Wire n=1, Satellite n=0, Mobile Phone n =0

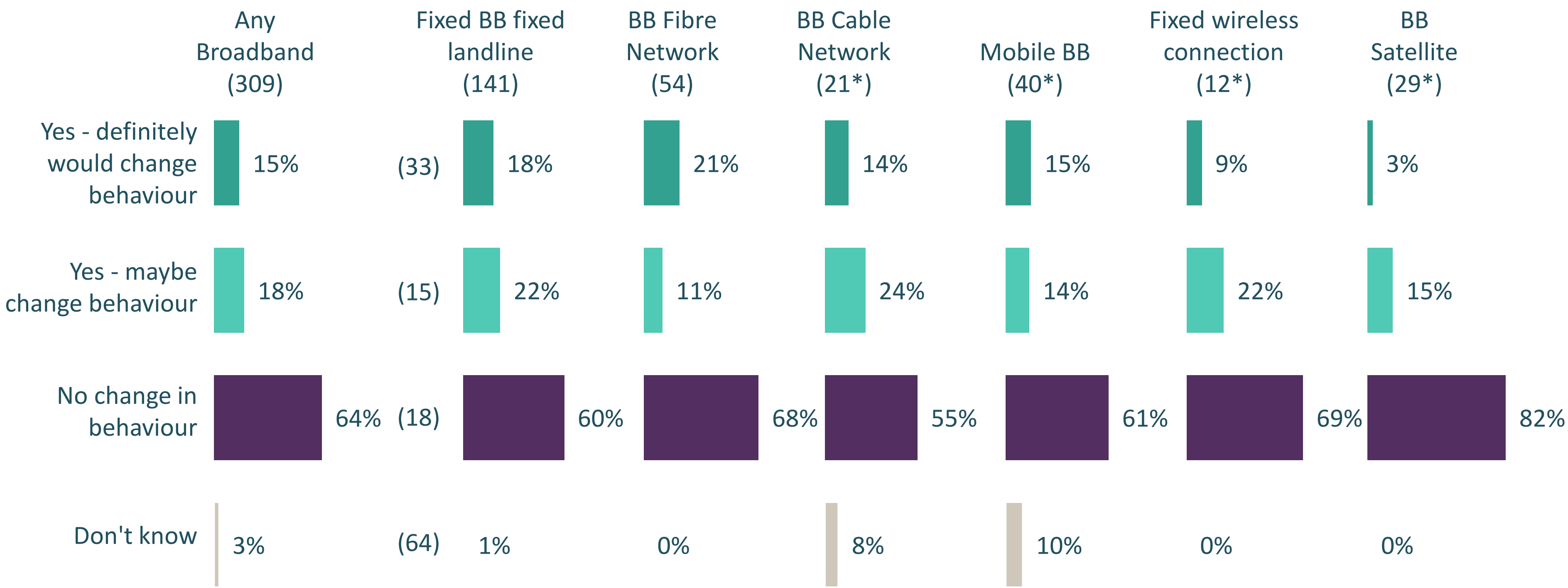
25% of broadband bundle switchers are likely to switch to a Fibre broadband service with 12% likely to switch to a satellite broadband service

SSNIP
(Broadband
Non Bundle Users)

Response to €2 Price Increases – Broadband Non Bundle Owners

(Base: Total Broadband Users who Use A Service Not In A Bundle - 309)

Q.S6/Q.S26 Do you believe that your business would change your actual purchasing behaviour with respect to your broadband service?



( ) Figures in brackets relate to total actual figures

* -Small Base

Mobile Phone n=4, Satellite n=3

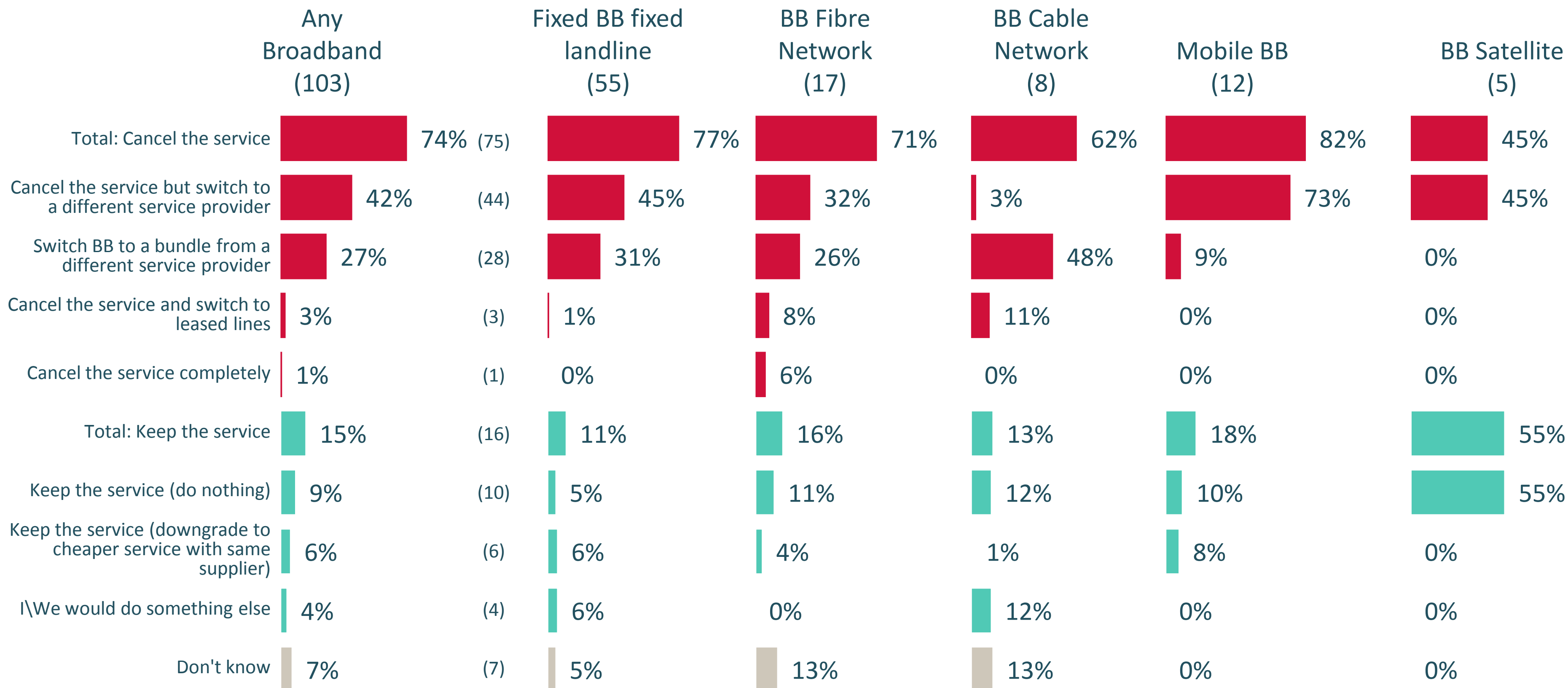
33% of broadband non bundle business claim they would change behaviour given a €2 increase in the broadband cost

REDC

Response to €2 price increases – Broadband Non Bundle

(Base: All non bundle broadband who would change behaviour – n=103)

Q.S7 Which of the following would describe what your business would be most likely to do in response to this hypothetical €2 price increase of your broadband service?



( ) Figures in brackets relate to total actual figures

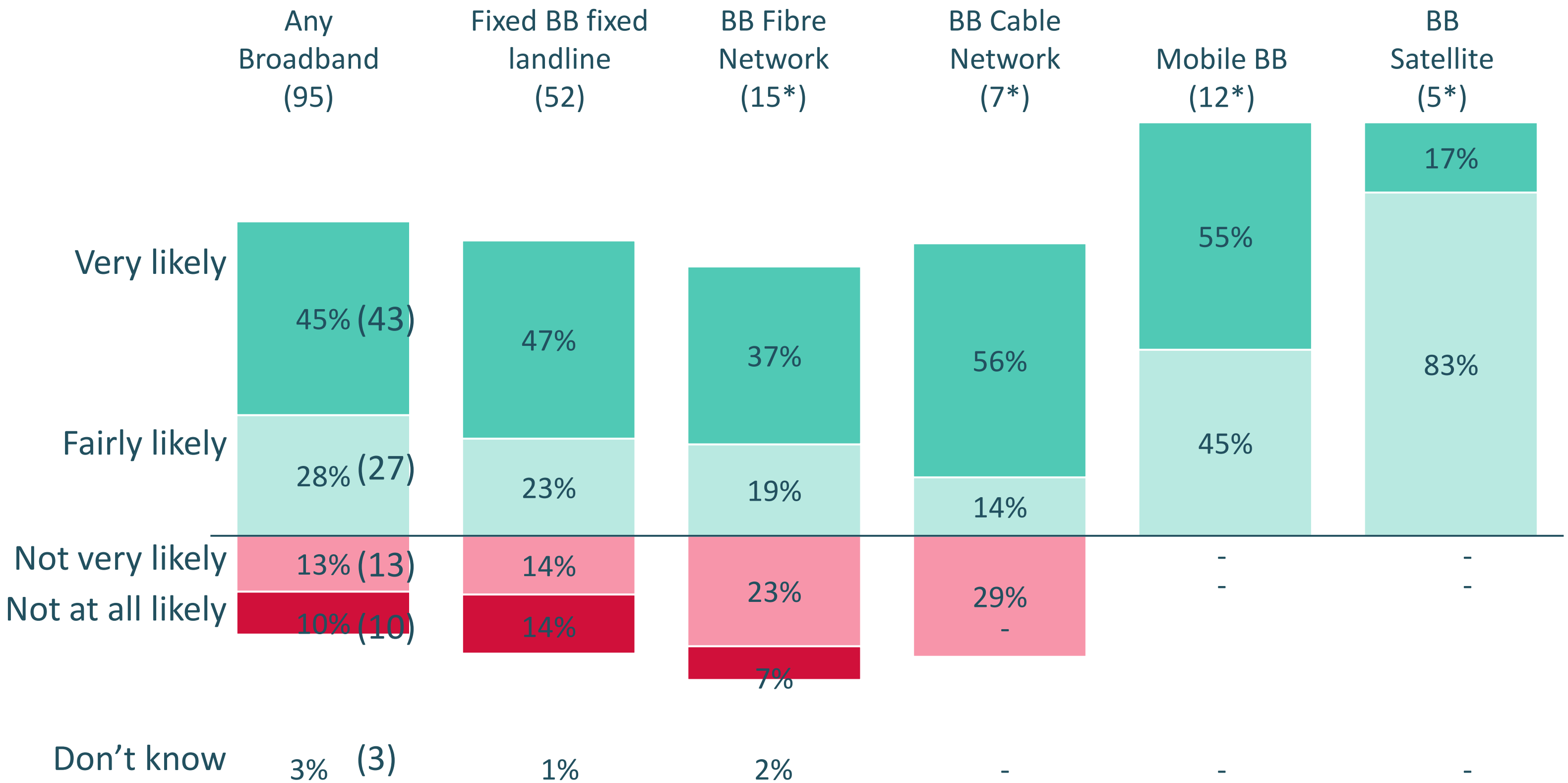
Small Base: Fixed Wire n=3, Satellite n=0, Mobile Phone n =1

74% of broadband non bundle businesses who will change behaviour are likely to cancel the service they have given a €2 price increase

Likelihood To Follow Through With Any Change In Behaviour – Non Bundle Users

(Base: Non Bundle who know how they would change their behaviour- 95)

Q.S8 How likely is your business to carry out any of the stated actions



Total: Likely	73% (70)	70%	57%	71%	100%	100%

( ) Figures in brackets relate to total actual figures

* Small Base:
Fixed Wire = 4 Mobile Phone = 0

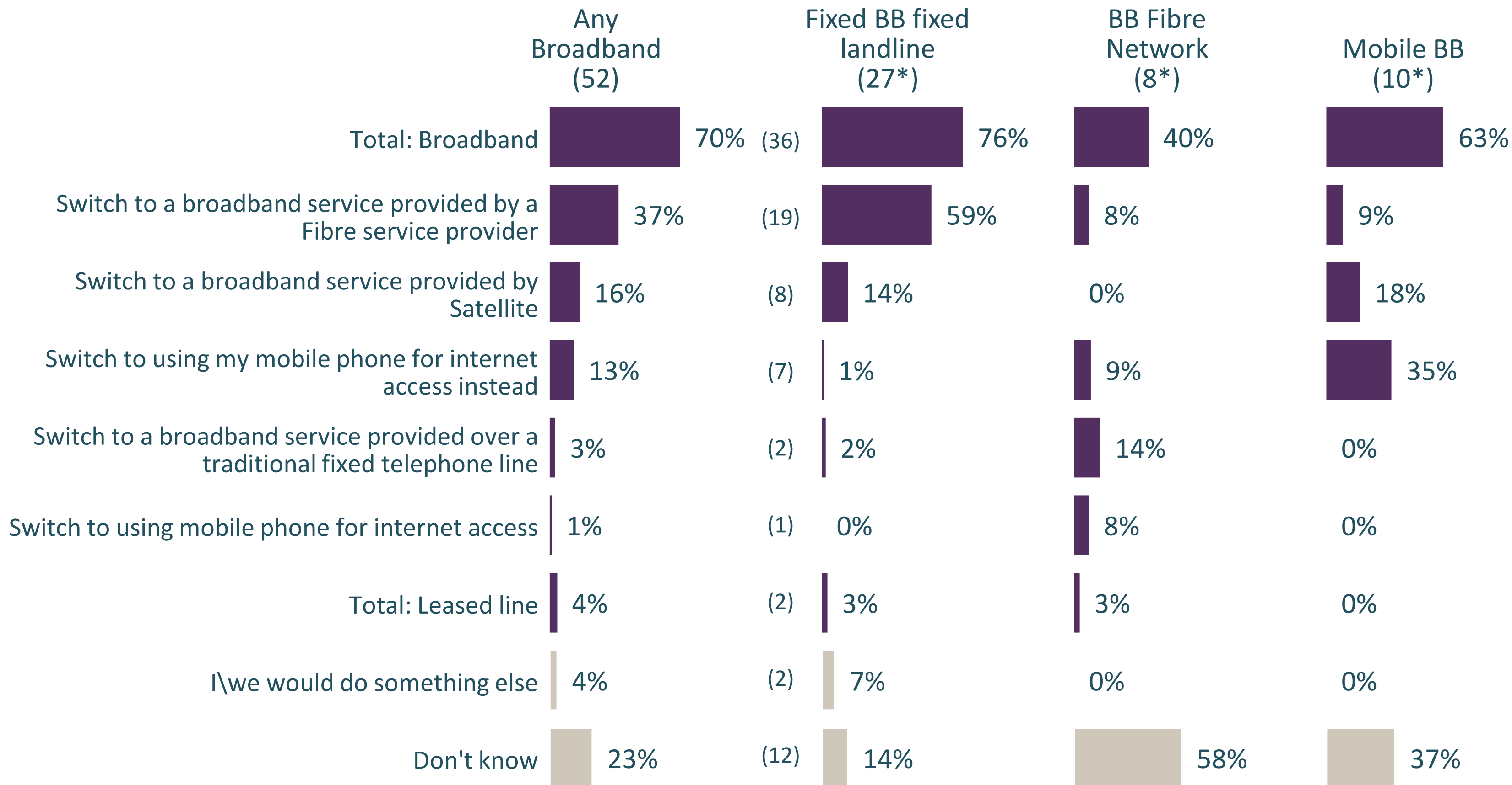
76% of broadband non bundle businesses who will keep/switch broadband given €2 increase state they are likely to do this.

REDC

Service Likely to Switch To – Broadband Non Bundle Switchers

(Base: All Broadband non Bundle who may switch broadband – n=52)

Q.S9/Q.S29 Which type of broadband\ leased line service would your business be most likely to switch to?



( ) Figures in brackets relate to total actual figures

* -small base

Cable n=3, fixed wireless n=3, satellite n=2

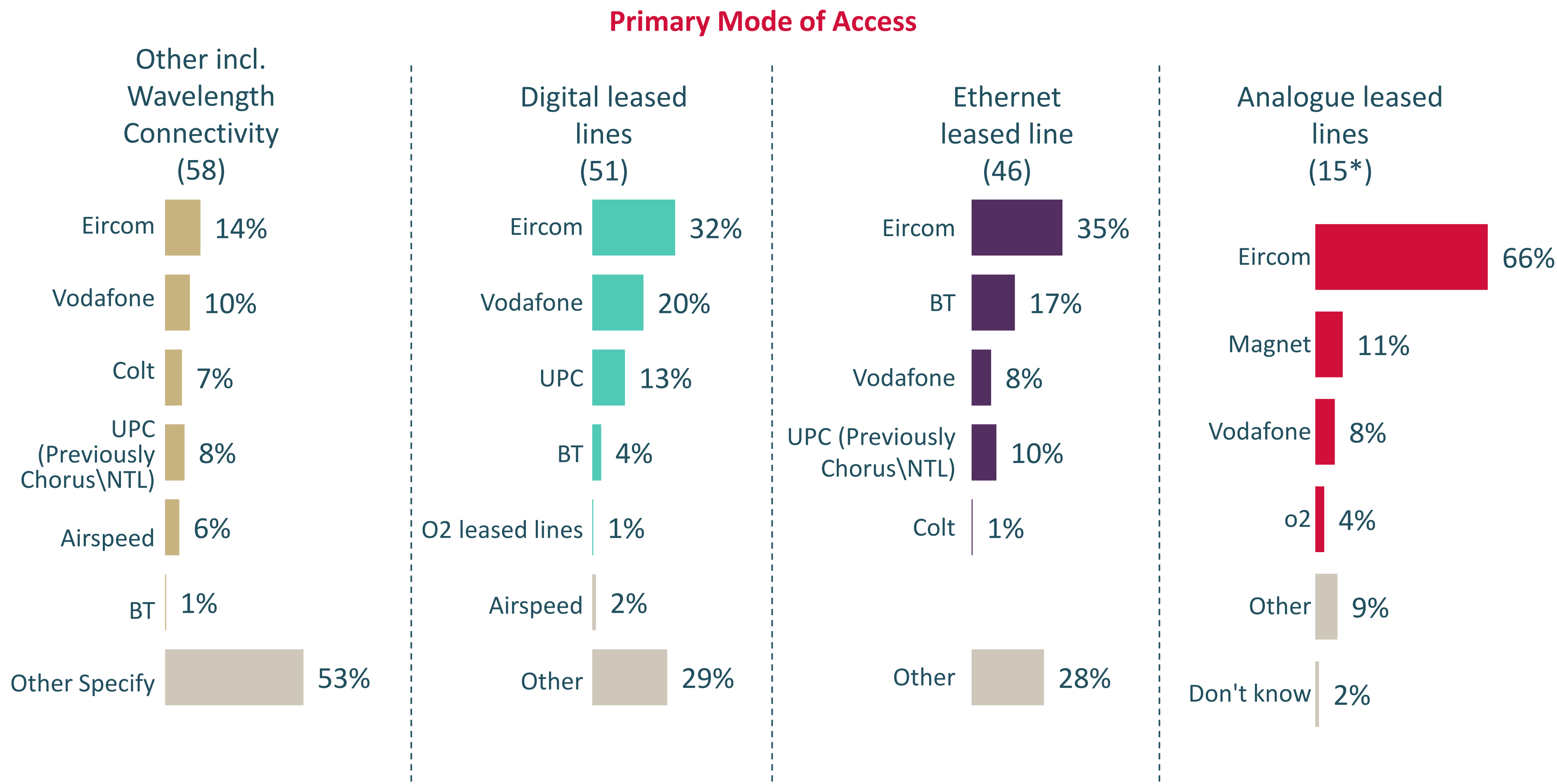
37% of broadband non bundle switchers are likely to switch to a fibre broadband service with 16% likely to switch to a satellite broadband service.

REDC

Leased Lines Suppliers and Usage

Current Leased Line Provider Share

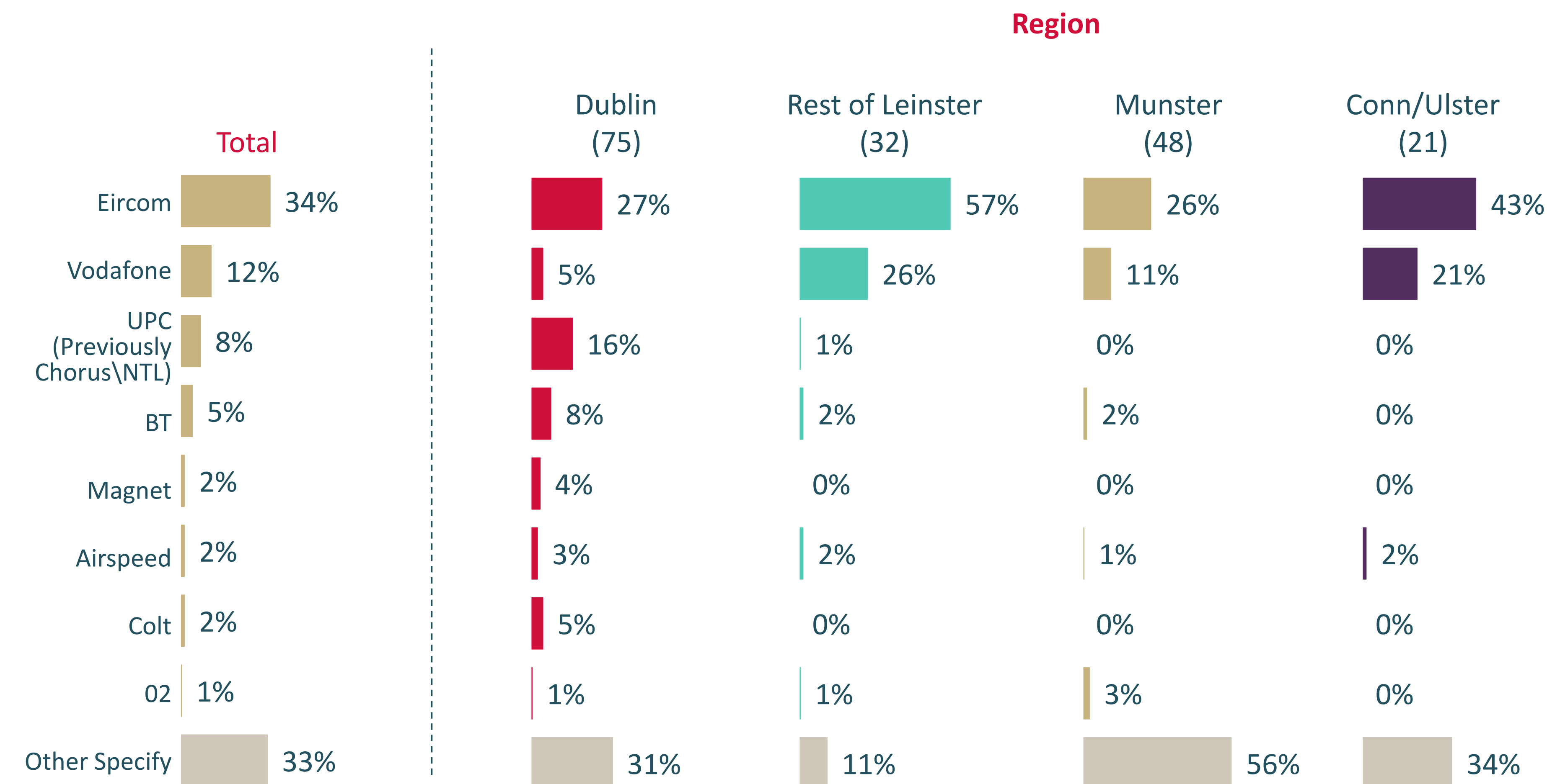
(Base: All respondents who use leased line data connectivity services leased line, n= 176)



Eircom is the main supplier of leased lines across all access means.

Current Leased Line Provider Share

(Base: All respondents who use leased line data connectivity services leased line, n= 176)



Eircom is also the main supplier of leased lines across all regions.

REDC

Use of Primary Service – Leased Line Primary Access User

(Base: All respondents who use leased line data connectivity services leased line, n= 176)

Q.17/75/110 What does your business use your (SCRIPT IN PRIMARY SERVICE Q10) for?

	Any Leased Line (n=176)	Primary Access Mode			
		Other Incl. Wavelength Connectivity (58)	Digital leased lines (51)	Ethernet leased line (46)	Analogue leased lines (15)
Email and internet	85%	90%	72%	94%	82%
Data services such as cloud computing and other software services	47%	67%	43%	54%	18%
Connectivity between business premises	53%	59%	60%	48%	42%
Employee remote access to the business network	49%	52%	50%	48%	49%
Disaster recovery services	34%	38%	37%	27%	34%
Voice - VoIP\ Voice over broadband	41%	49%	32%	31%	60%
Card Machines	0%	-	-	-	-
Other	4%	2%	7%	-	-

Email and internet used most extensively in leased line business with connectivity between premises registering in second place in terms of usage

Use of Secondary Service – Leased Line Secondary Users

(Base: All respondents who use leased line data connectivity services, n= 93)

Q.18/76/111 What does your business use your <secondaryservice> for?

	Any Leased Line (n=93)	Secondary Mode of Access: Other incl Wavelength Connectivity (10*)	Digital leased lines (31*)	Ethernet leased line (11*)	Analogue leased lines (36*)
Email and internet	65%	90%	78%	91%	54%
Connectivity between business premises	39%	62%	40%	51%	27%
Employee remote access to the business network	26%	9%	22%	13%	29%
Data services such as cloud computing and other software services	24%	59%	12%	32%	28%
Disaster recovery services	24%	15%	13%	15%	36%
Voice - VoIP \ Voice over broadband	19%	16%	14%	13%	26%
Other	20%	32%	15%	9%	27%
Don't know	1%	-	1%	-	-

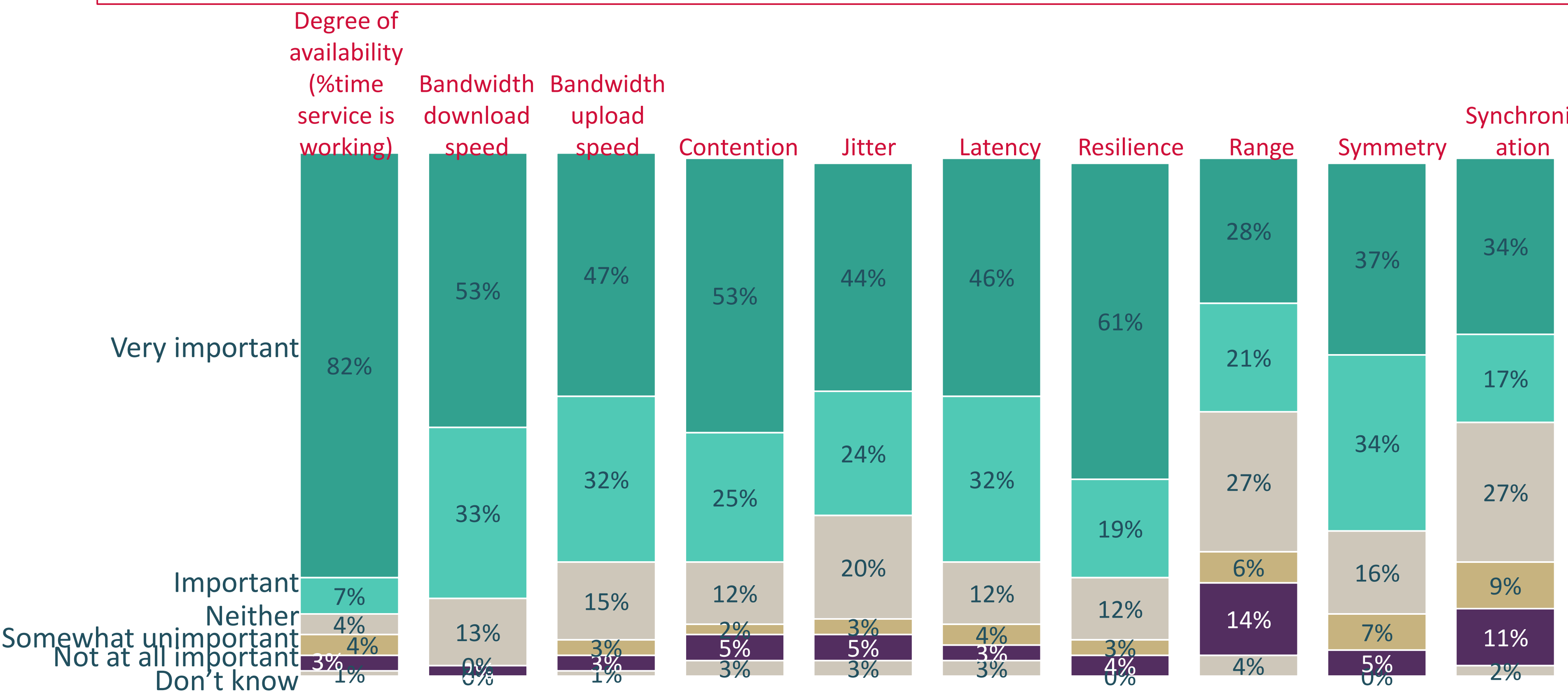
* Small Base

Leased line secondary users main source of use is email and internet (65%) followed by connecting business premises together (39%).

Importance of Aspects When Selecting Primary Leased Line Supplier?

(Base: All respondents who use leased lines as their primary service, n= 176)

Q.19/77/112 Thinking about your primary service, how important are each of the following aspects when selecting a service supplier?



Total: Important	89%	86%	79%	78%	68%	78%	80%	49%	71%	51%

Availability (% of time service is working) of service (89%) and download speed of service (86%) are the two most important considerations when selecting primary leased line supplier.

Importance of Aspects When Selecting Primary Leased Line Supplier?

(Base: All respondents who use leased lines as a primary service, n= 176)

Q.19/77/112 Thinking about your primary service, how important are each of the following aspects when selecting a service supplier?

	Total (n=176)	Other incl Wavelength Connectivity (58)	Digital leased lines (51)	Ethernet leased line (46*)	Analogue leased lines (15*)
Degree of availability (%time service is working)	89%	90%	86%	96%	79%
Bandwidth - download speed	86%	97%	80%	94%	69%
Bandwidth - upload speed	79%	93%	72%	75%	79%
Connection	78%	91%	74%	88%	62%
Jittery	68%	75%	62%	79%	64%
Latency	78%	80%	70%	96%	90%
Resilience	80%	88%	75%	89%	73%
Symmetry	71%	82%	65%	67%	77%
Range	49%	51%	34%	59%	56%
Synchronisation	51%	55%	57%	50%	44%

* Small base size

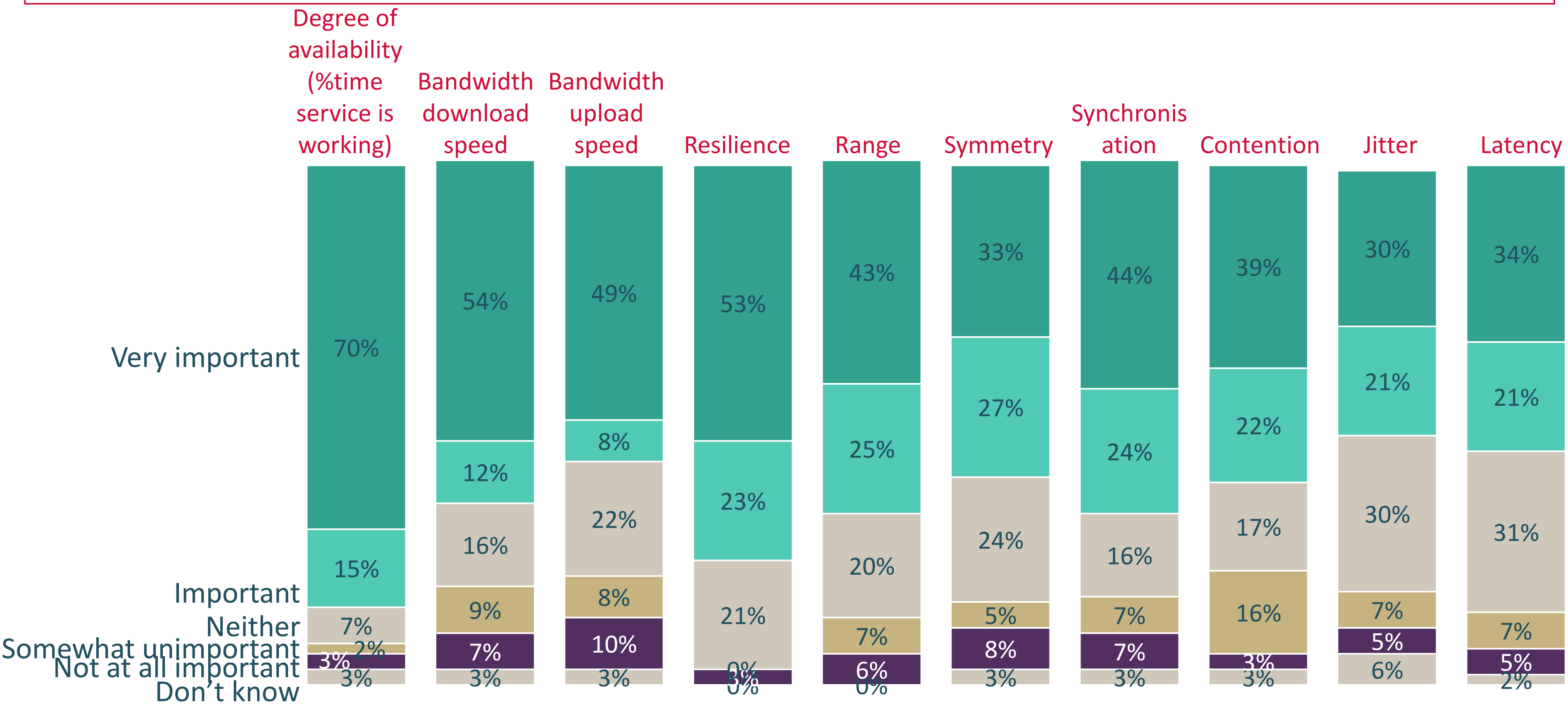
Many aspects of selecting primary leased line supplier register higher for those with other incl. wavelength connectivity leased lines.

REDC

Importance of Aspects when Selecting Secondary Leased Line Supplier?

(Base: All respondents who use a secondary LL service, n= 93)

Q.20/78/113 Thinking about your Secondary service, how important are each of the following aspects when selecting a service supplier?



Total: Important	85%	66%	57%	76%	68%	60%	68%	61%	51%	55%

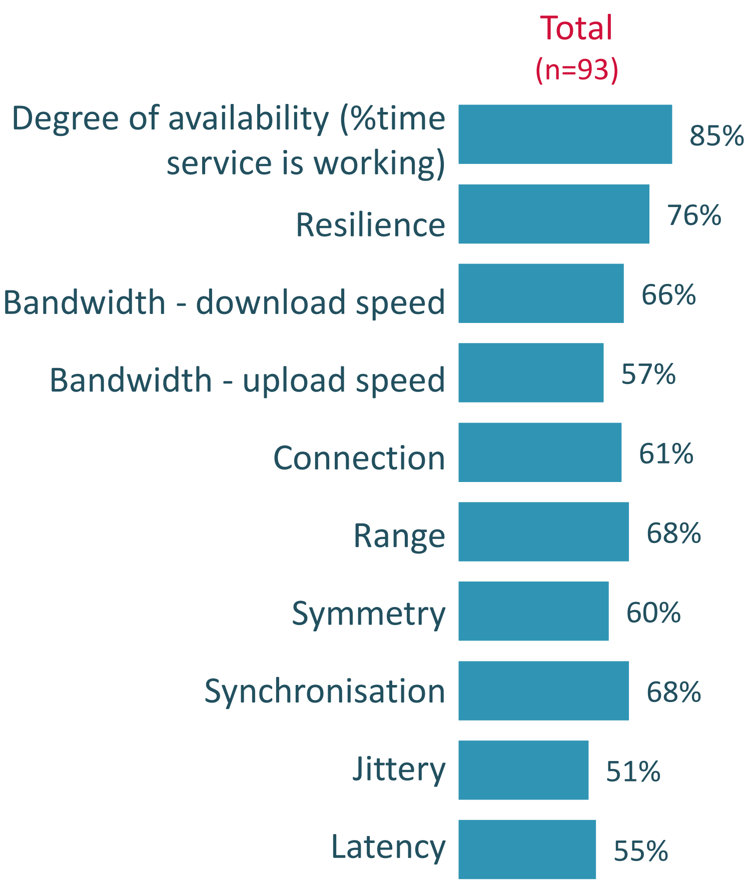
Availability (% of time service is working) is significantly the most important consideration when selecting a secondary leased line supplier.

REDC

Importance of Aspects when Selecting Secondary Leased line Supplier?

(Base: All respondents who use leased lines as a secondary service, n= 93)

Q.20/78/113 Thinking about your Secondary service, how important are each of the following aspects when selecting a service supplier?



	Primary Mode of Access			
	Other Incl. Wavelength Connectivity (10*)	Digital leased lines (31*)	Ethernet leased line (11*)	Analogue leased lines (36*)
Degree of availability (%time service is working)	61%	86%	93%	85%
Resilience	61%	79%	93%	70%
Bandwidth - download speed	54%	78%	69%	60%
Bandwidth - upload speed	51%	62%	69%	55%
Connection	55%	90%	88%	53%
Range	50%	77%	85%	67%
Symmetry	47%	72%	85%	55%
Synchronisation	49%	85%	85%	59%
Jittery	57%	68%	51%	44%
Latency	57%	68%	51%	50%

* Small base

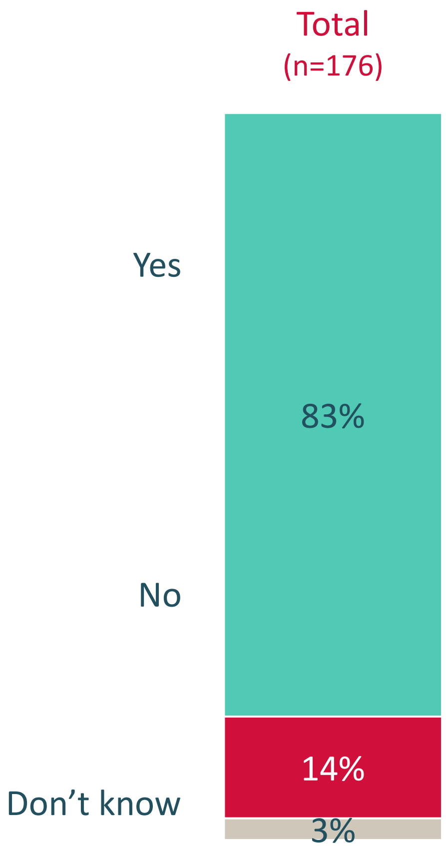
Key issues in selection of secondary leased line supplier Availability (85%) and Resilience (76%)

Service Level Agreements (Leased Line)

Service Level Agreement's (SLA's)

(Base: All leased line users, n = 176)

Q.21/78/114 Do you have service contracts or Service Level Agreements (SLAs) with your service provider? These might include fault repair times, out of hours service, compensation if service levels are not met etc.



Primary Mode of Access				
	Other Incl. Wavelength Connectivity (n=58)	Digital leased lines (n=51)	Ethernet leased line (n=46*)	Analogue leased lines (n=15*)
Yes	92%	77%	83%	71%
No	6%	20%	17%	21%
Don't Know	2%	3%	-	8%

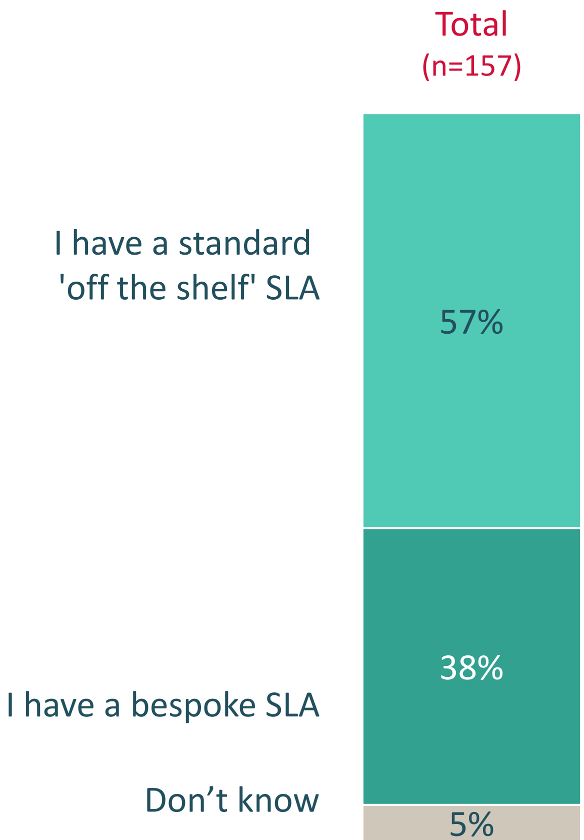
*Base small

Rates of having an SLA are notably high for leased line Users, with other incl. wavelength connectivity Leased line users the most likely to have an SLA.

Type of SLA's

(Base: All leased line primary users who have an SLA in place, n = 157)

Q.22 Do you have a standard 'off the shelf' or bespoke SLA with your broadband service provider(s)? A bespoke SLA might have more parameters or better service level commitments included in it compared to a standard SLA.



Primary Mode of Access – Standard SLA			
Other incl. Wavelength Connectivity (n=53)	Digital leased lines (n=44*)	Ethernet leased line (n=43*)	Analogue leased lines (n=11*)
59%	66%	37%	70%

Primary Mode of Access – Bespoke SLA			
Other Incl. Wavelength Connectivity (n=53)	Digital leased lines (n=44*)	Ethernet leased line (n=43*)	Analogue leased lines (n=11*)
36%	31%	53%	30%

*Small base

Ethernet users with an SLA are notably more likely than other leased line users to have a bespoke agreement (53%)

REDC

What Parameters Are Included in the SLA's You Have?

(Base: All Leased Line Users Who Use A Leased Line Primary Service And Have A SLA In Place, n= 157)

Q.23/Q.81/Q.116 Do you know which if any of the following parameters are included in your SLA?

	Total Leased Line (n=157)	Primary Mode of Access			
		Other Incl. Wavelength Connectivity (n=53)	Digital leased lines (n=44*)	Ethernet leased line (n=43*)	Analogue leased lines (n=11*)
Availability	86%	90%	90%	86%	91%
Fault repair	89%	90%	92%	93%	81%
Delivery times for new service	78%	90%	77%	79%	52%
Access to service provider out of hours service	52%	45%	40%	52%	32%
Compensation if service levels are not met	43%	47%	51%	66%	63%

*Base small

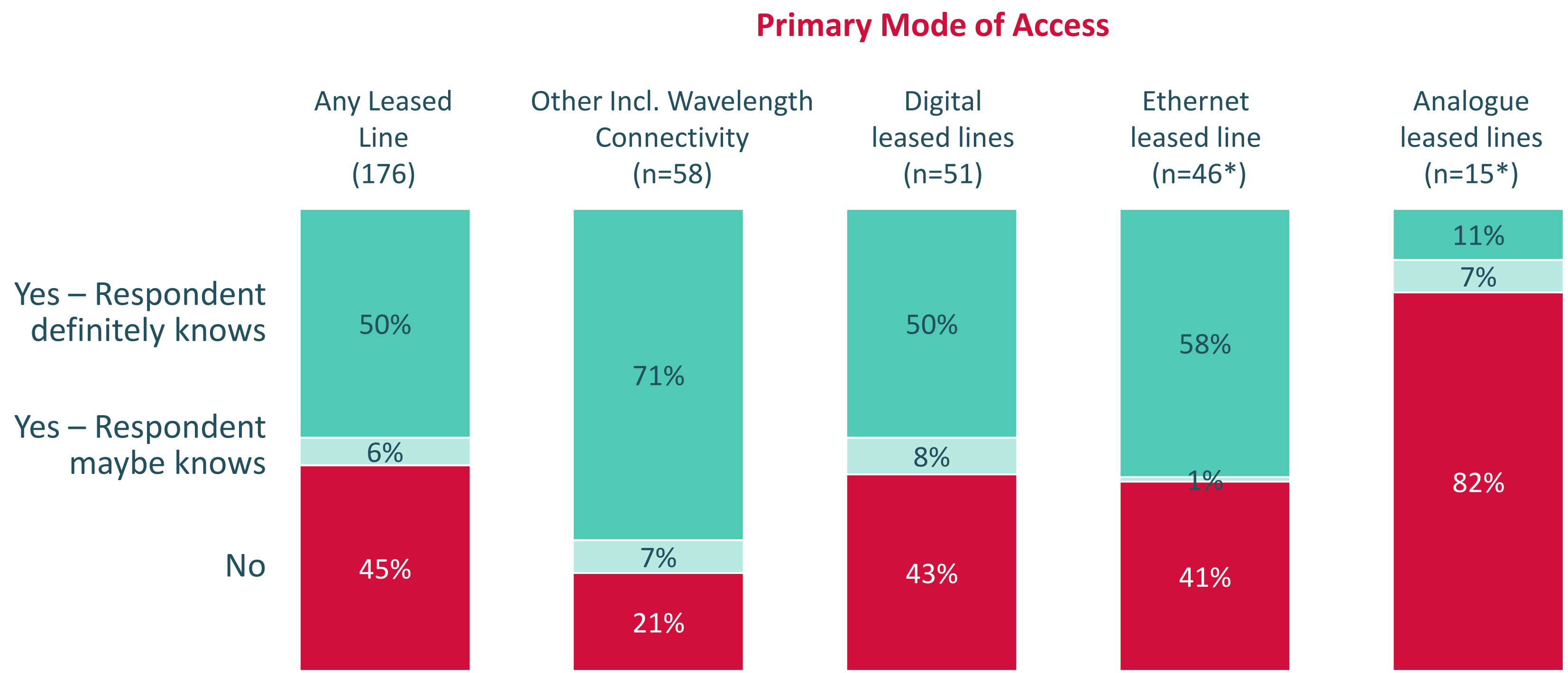
Fault repair and availability (% of time service is working) parameters are included in more than 80% of SLA's across all leased line access modes, making them the most common parameter to be included across access types.

Speed of Connections (Leased Line)

Knowledge of Claimed Maximum Download Speed

(Base: Total leased line users, n = 176)

Q.50/Q.117 Do you know the claimed maximum download speed for your main leased line <primaryservice> service?



*Base small

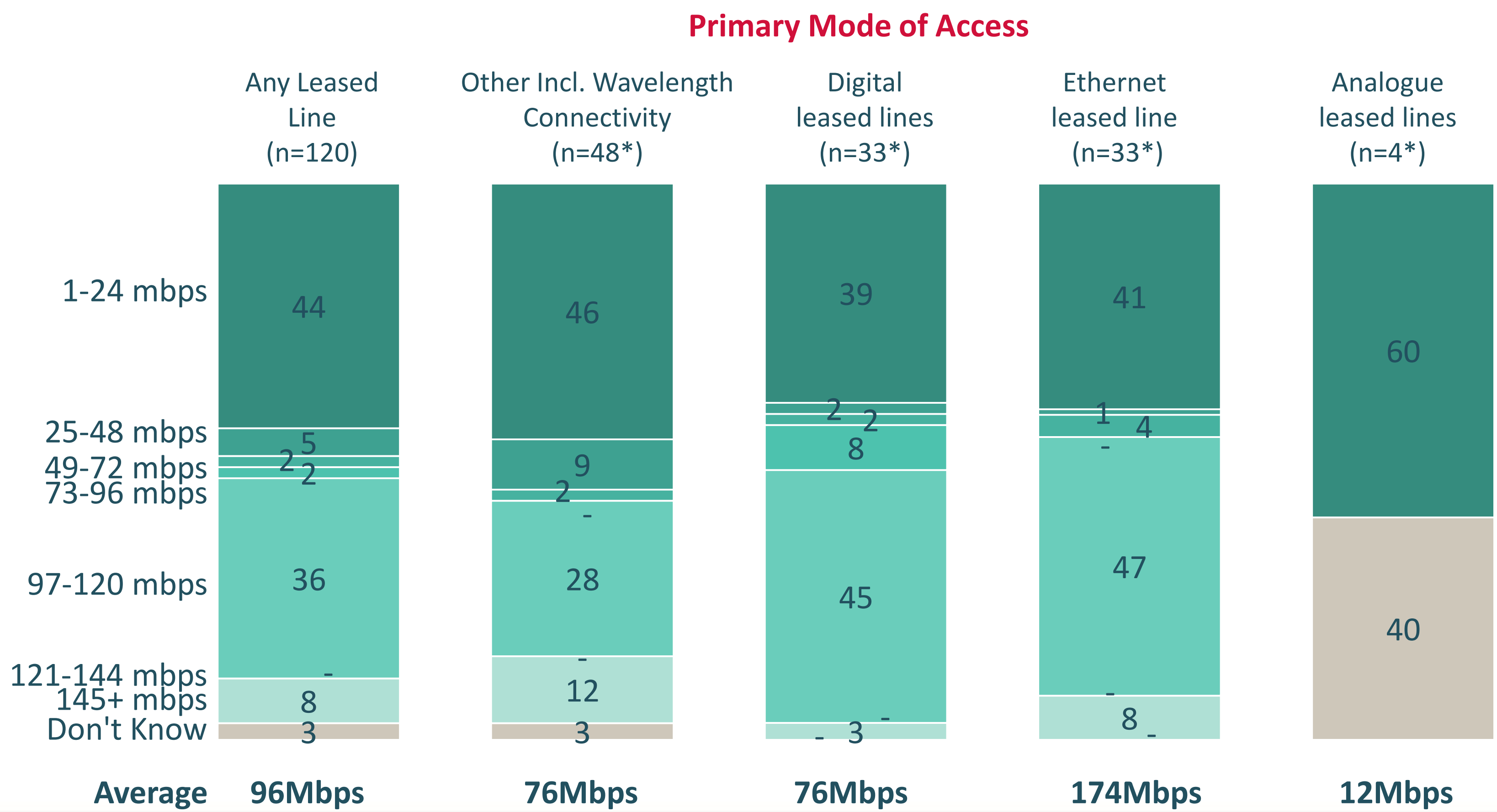
56% of leased line users stated that they know the maximum claimed download speed of their service.

(Q.50/117)

What is Maximum Claimed Download Speed?

(Base: Total Leased Line Users Who Know Download Speed, n=120)

Q.51/Q.118 What is the maximum claimed download speed for your main leased line <primaryservice> service in Megabits per second?



*Base small

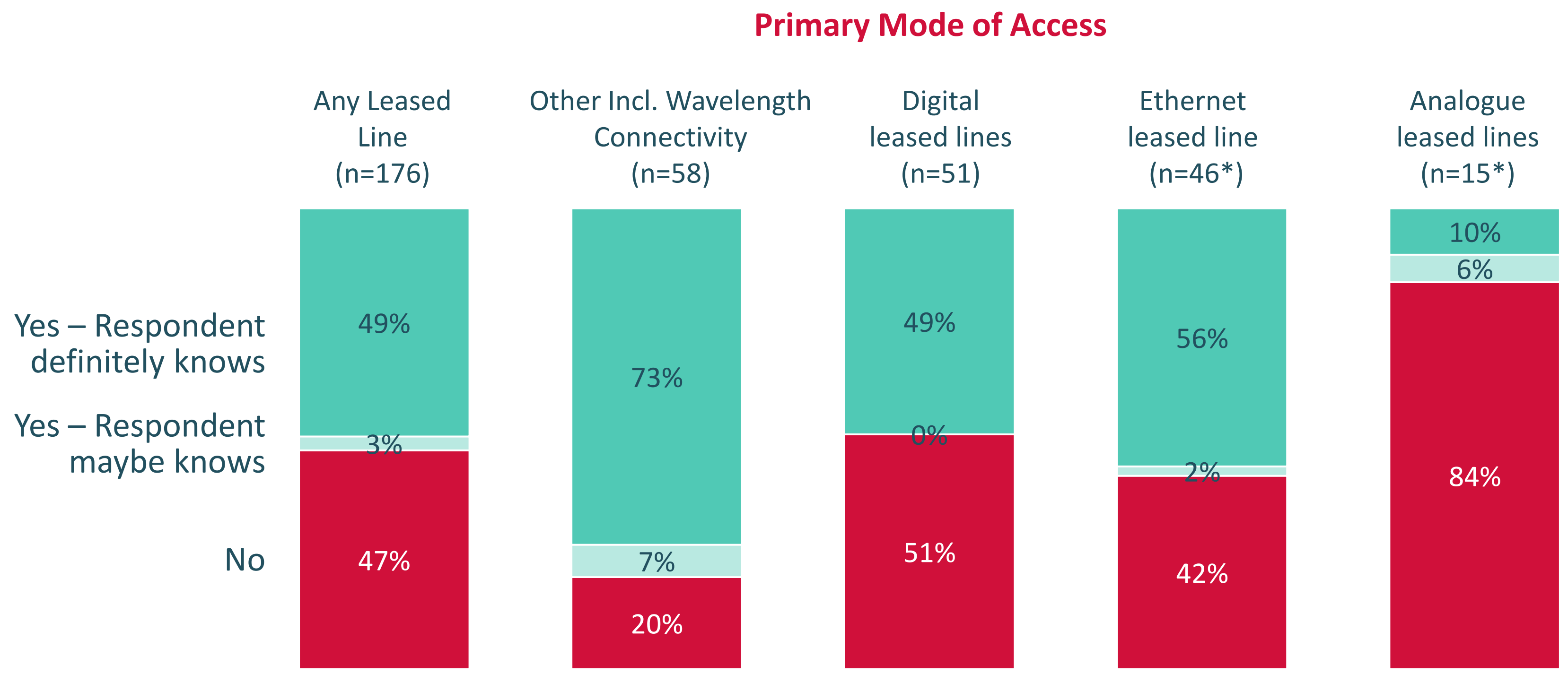
At 174mbps ethernet customers have the highest claimed download speed among leased line users, notably faster than all other forms of leased line.

(Q.51/118)

Knowledge of Claimed Maximum Upload Speed

(Base: Total Leased Line Users, n=176)

Q.52/Q.119 Do you know the claimed maximum upload speed for your main leased line <primaryservice> service?



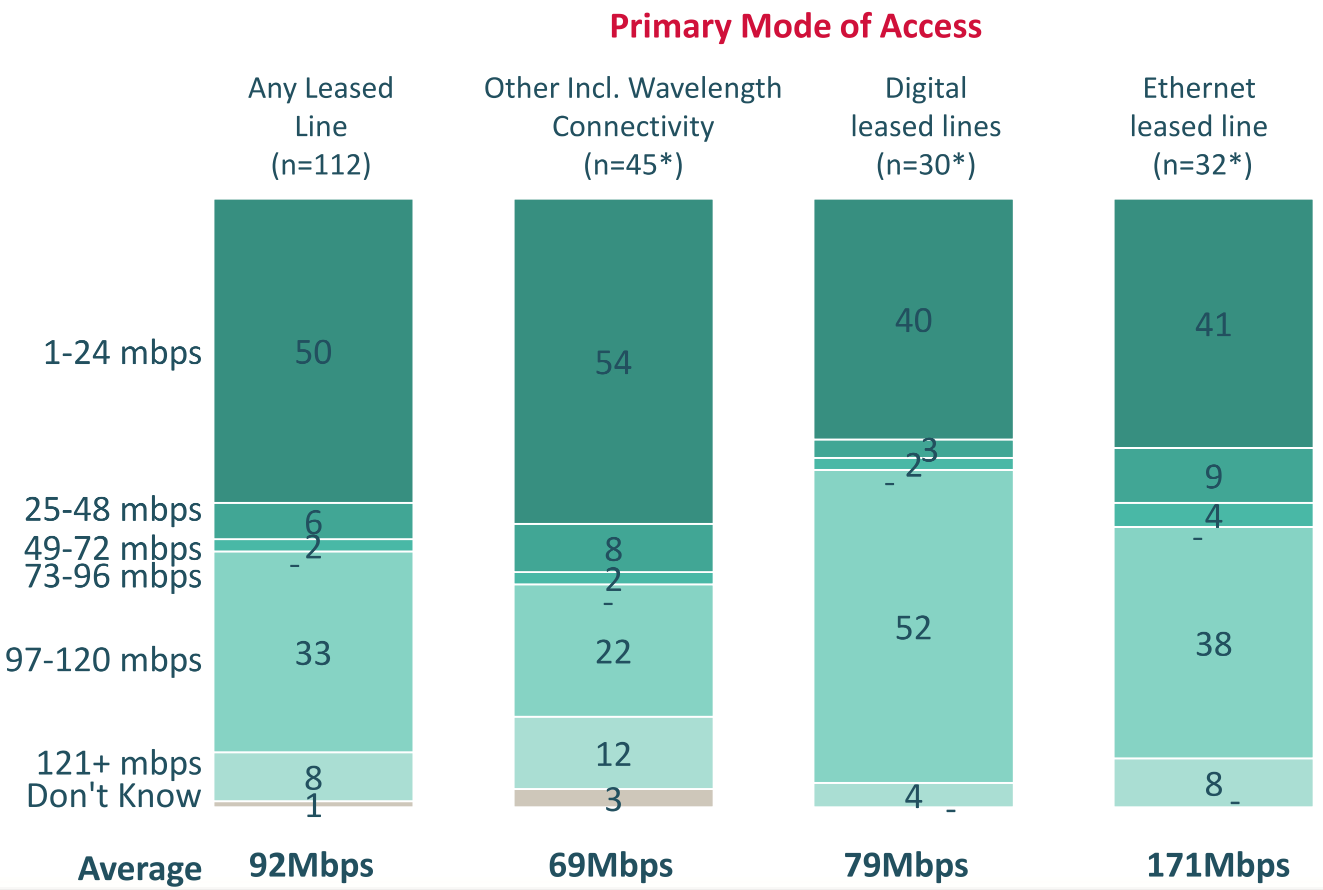
*Base small

52% of leased line users stated that they know their claimed maximum upload speed of their service.

What is Maximum Claimed Upload Speed?

(Base: Total Leased Line Users Who Know Upload Speed, n=112)

Q.53/Q.120 What is the maximum claimed upload speed for your main leased line <primaryservice> service in Megabits per second?



Base too small to show Analogue Leased Lines

*Base small

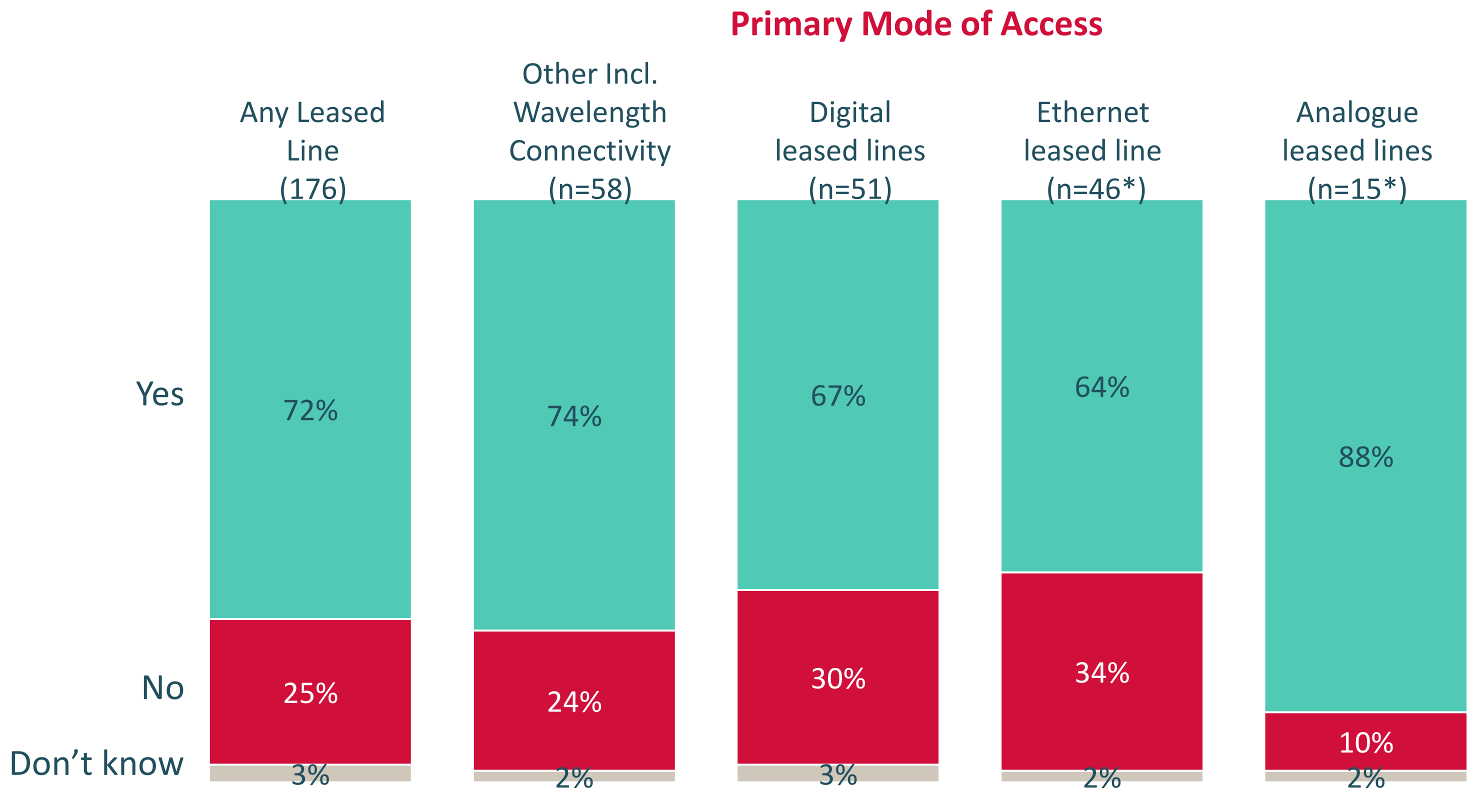
Ethernet leased line users have the fastest claimed upload speed at 171mbps.

Contracts, Loyalty And Ability To Negotiate (Leased Line)

Is Primary Service in Contract – Leased Line?

(Base: Total Leased Line Users, n = 176)

Q.70/Q.137 Thinking about your primary\main leased line service (<primaryservice>) are you currently tied into a contract with your service provider?



72% of leased line users are currently in contract.

Minimum Contract Period - Those in Contract

(Base: Total Leased Line Users Who Are Currently Tied Into A Contract, n=135)

Q.71/Q.138 What is the minimum contract period of this service - from sign up time to when you can leave your service provider?

		Primary Mode of Access			
	Total (n=135)	Other Incl. Wavelength Connectivity (n=45)	Digital leased lines (n=39*)	Ethernet leased line (n=35*)	Analogue leased lines (n=12*)
Six Months	2%	0%	1%	35%	0%
Twelve Months	27%	16%	31%	7%	55%
Eighteen Months	20%	16%	25%	15%	20%
Longer than 18 Months	17%	23%	14%	21%	25%
Don't know	35%	44%	29%	52%	0%

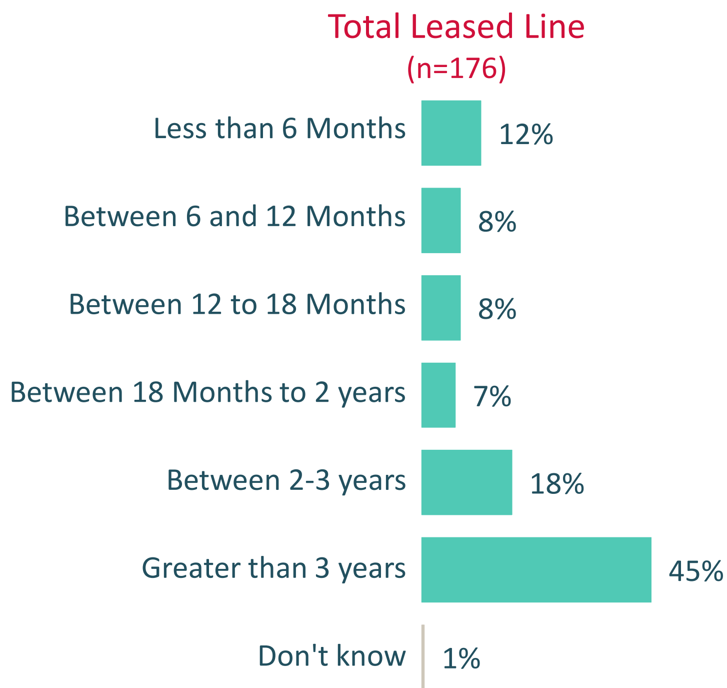
*Caution Small Base

12 months is the most common length of contract on leased line contracts at 27%.

Length of Time with Current Provider

(Base: Total Leased Line Users, n = 176)

Q.72/Q.139 How long has your business been with your current main service provider for ...?



Primary Mode of Access			
Other Incl. Wavelength Connectivity (n=58)	Digital leased lines (n=51)	Ethernet leased line (n=46*)	Analogue leased lines (n=15*)
5%	19%	1%	28%
8%	3%	0%	28%
7%	13%	11%	0%
4%	11%	12%	0%
32%	14%	18%	6%
41%	38%	58%	37%
1%	2%	0%	2%

*Caution Small Base

45% of leased line customers have been with their current provider for greater than 3 years, with 12% having joined in the past six months.

REDC

Leased Line Users - Ability to negotiate terms and conditions

(Base: Total Leased Line Users, n = 176)

Q.72b/Q.140 Were you in a position to negotiate improved prices and or other terms and conditions with your leased line service provider?

	Total Leased Line (n=176)	Primary Mode of Access			
		Other Incl. Wavelength Connectivity (n=58)	Digital leased lines (n=51)	Ethernet leased line (n=46)	Analogue leased lines (n=15)
Total: Yes	70%	72%	75%	75%	63%
Yes - Strong Ability to negotiate	42%	36%	48%	63%	25%
Yes - Moderate ability to negotiate	28%	36%	27%	12%	38%
No - No ability to negotiate	24%	19%	19%	23%	35%
Don't know	6%	9%	6%	2%	2%

70% of leased line customers claim to have an ability to negotiate terms and conditions, with 42% claiming a strong ability to negotiate.

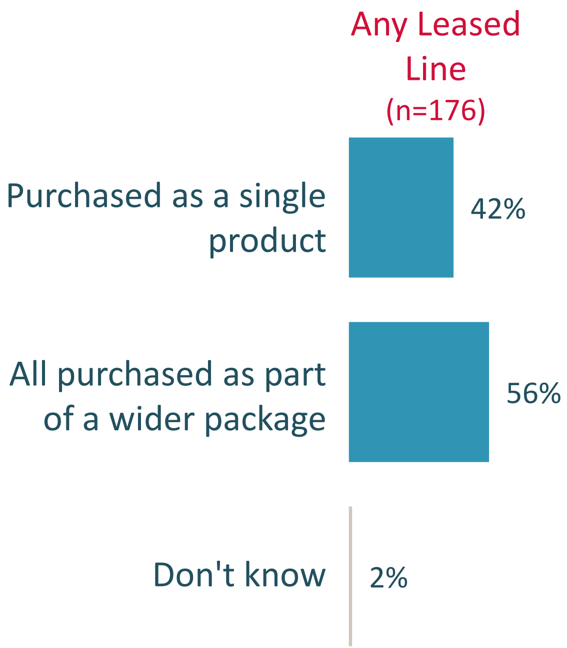
REDC

Bundles
(Leased Line)

Incidence of Bundling Leased Line

(Base: Total Leased Line Users, n = 176)

Q.54/Q.121 Do you purchase leased line services as a single product or as part of a wider network solution or telecoms package?



	Primary Mode of Access			
	Other Incl. Wavelength Connectivity (n=58)	Digital leased lines (n=51)	Ethernet leased line (n=46*)	Analogue leased lines (n=15*)
Purchased as a single product	58%	46%	27%	27%
All purchased as part of a wider package	41%	49%	72%	71%
Don't know	2%	5%	1%	2%

*Base small

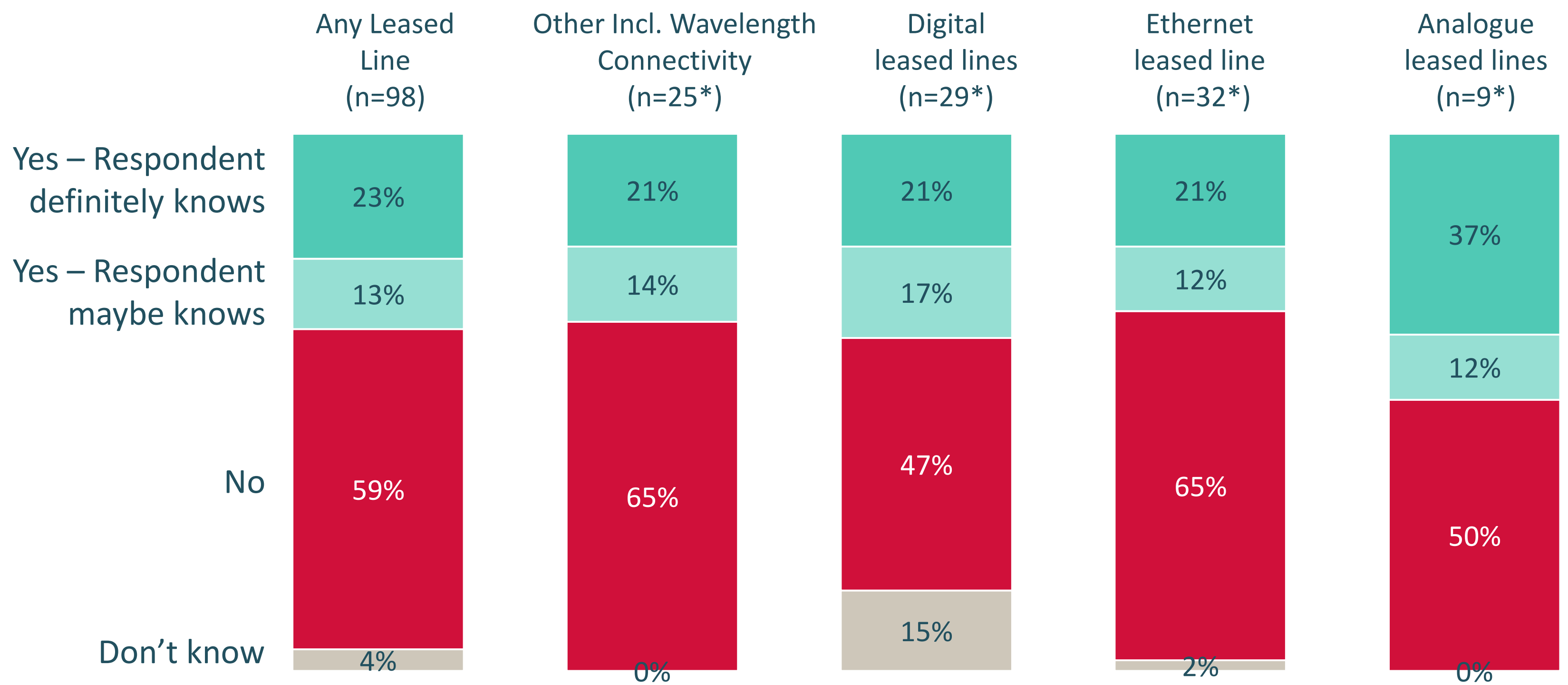
56% of leased line connections are bundled with ethernet and analogue leased lines significantly more likely to be part of a bundle.

Awareness of Cost of Services – Bundle Users

(Base: Total Leased Line Users Who Use A Service In A Bundle, n = 98)

Q.55/Q.122 Do you know how much your business pays for your combined service on a monthly basis?

Primary Mode of Access



Total: Yes	37%	35%	39%	34%	50%

*Caution Small Base

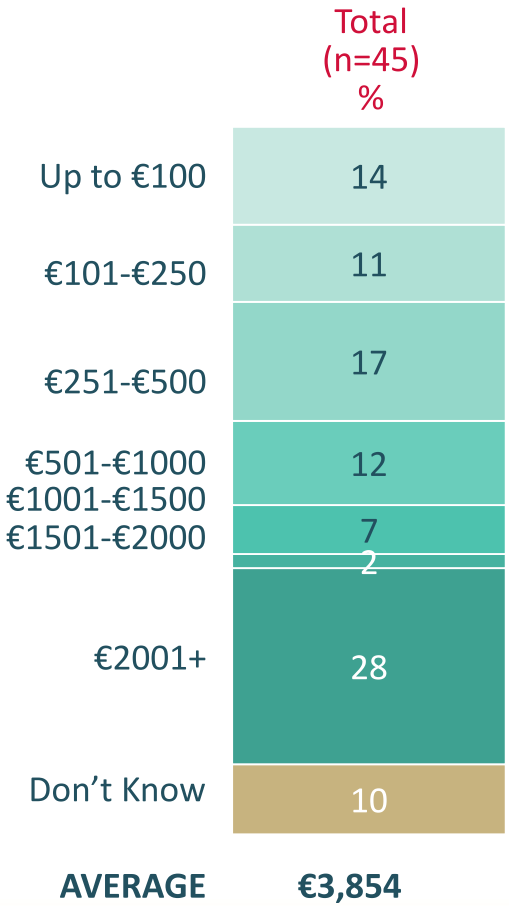
37% are aware of the cost of their bundled leased line services.

REDC

Typical Spend Per Month-Leased Line Bundle Users

(Base: Total Leased Line Users Who Use A Service In A Bundle And Knows Costs, n = 45)

Q.56/Q.123 How much does your business typically pay for this combined package of services per month i.e. excluding any promotional introductory offers?



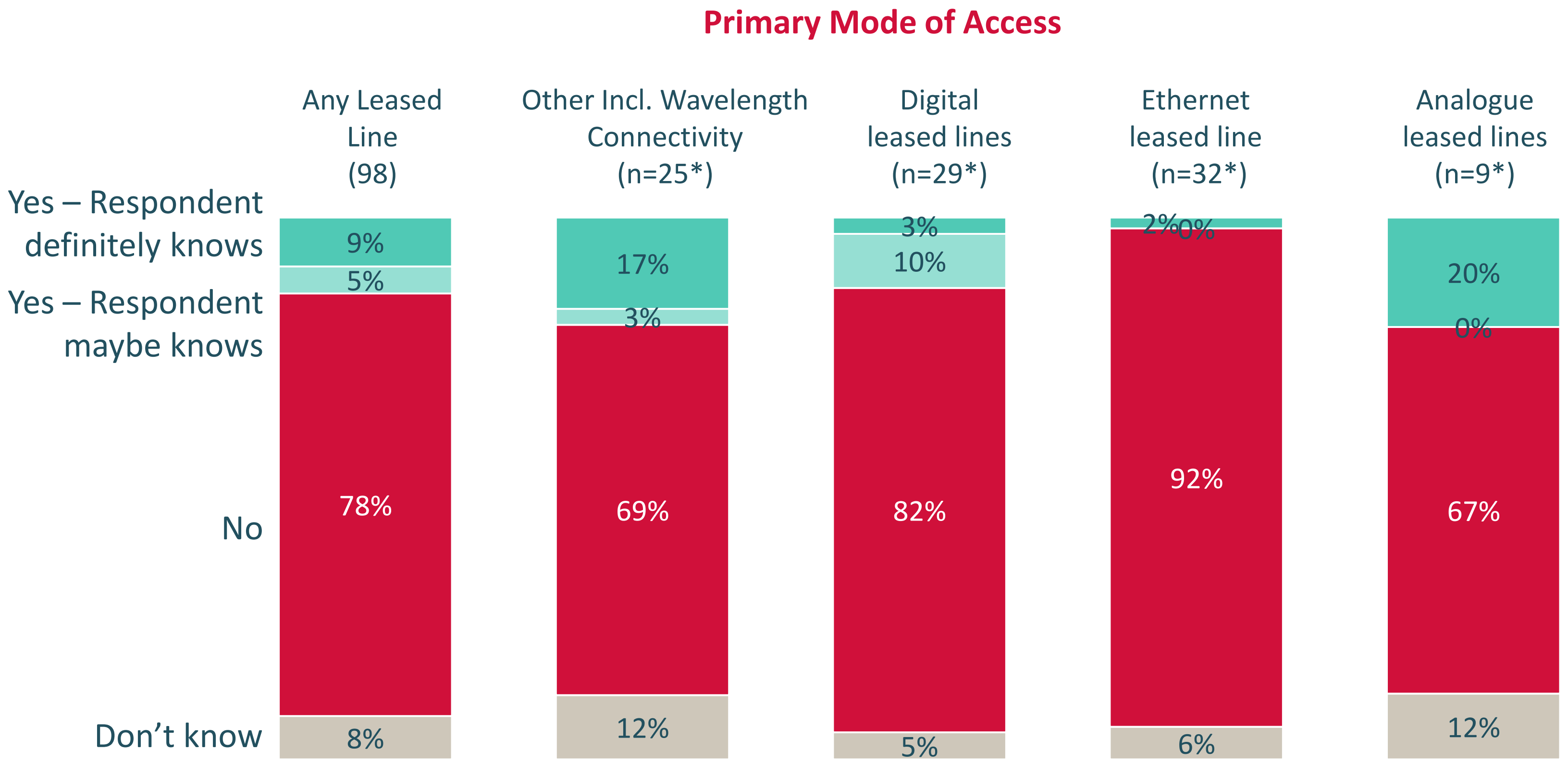
Base within Leased Line type too small to show

At a total level, the average leased line bundle cost is €3,854 with 28% claiming it costs greater than €2,000.

Knowledge of Additional Costs to Bundle Services

(Base: Total Leased Line Users Who Use A Service In A Bundle, n=98)

Q.57/Q.124 Does the monthly amount you pay for your services include any additional charges?



Total: Yes	14%	19%	13%	2%	20%

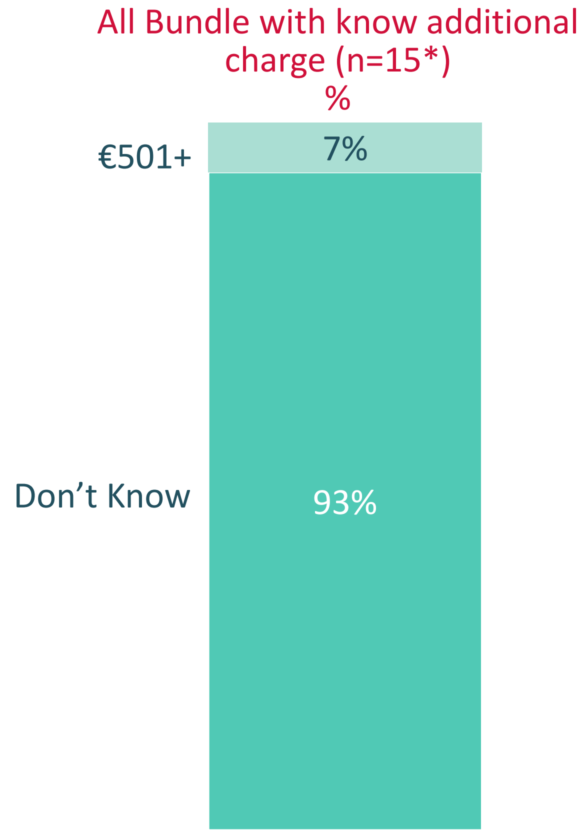
*Caution Small Base

Just 14% of Leased line bundle holders claim that their package includes additional charges.

Typical Spend Per Month (Additional Charges) - Bundle Users

(Base: All leased line bundle who know additional charge– n=15*)

Q.58/125 Can you estimate the cost of these additional charges?



* Small base on this slide

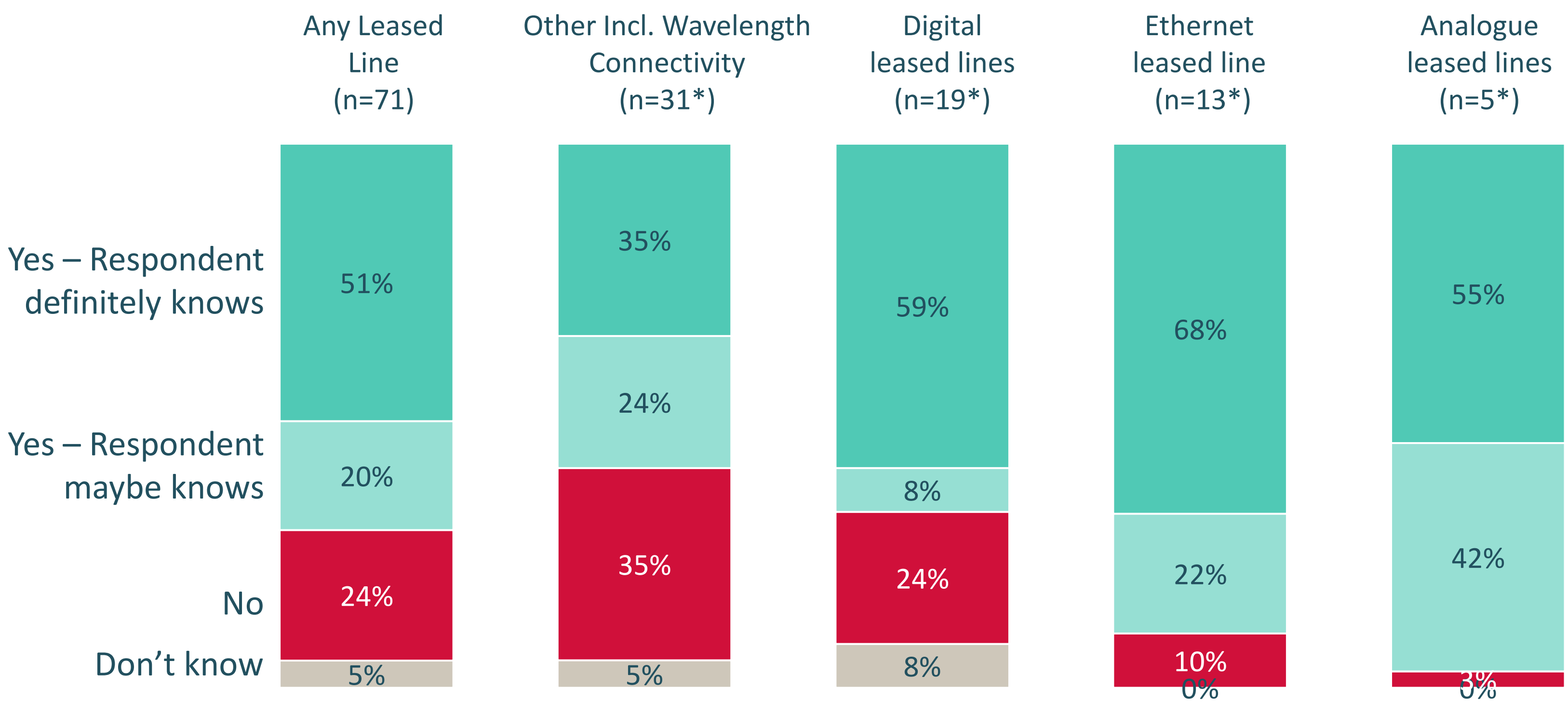
93% of bundle leased line business who know they incur additional charges on their leased line service do not know how much additional these costs each month.

Awareness of Cost of Services – Non Bundle Users

(Base: Total Leased Line Users Who Use A Service Not In A Bundle n = 71)

Q.59/Q.126 Do you know how much your business pays for your leased line service on a monthly basis?

Primary Mode of Access



Total: Yes	71%	59%	67%	90%	97%

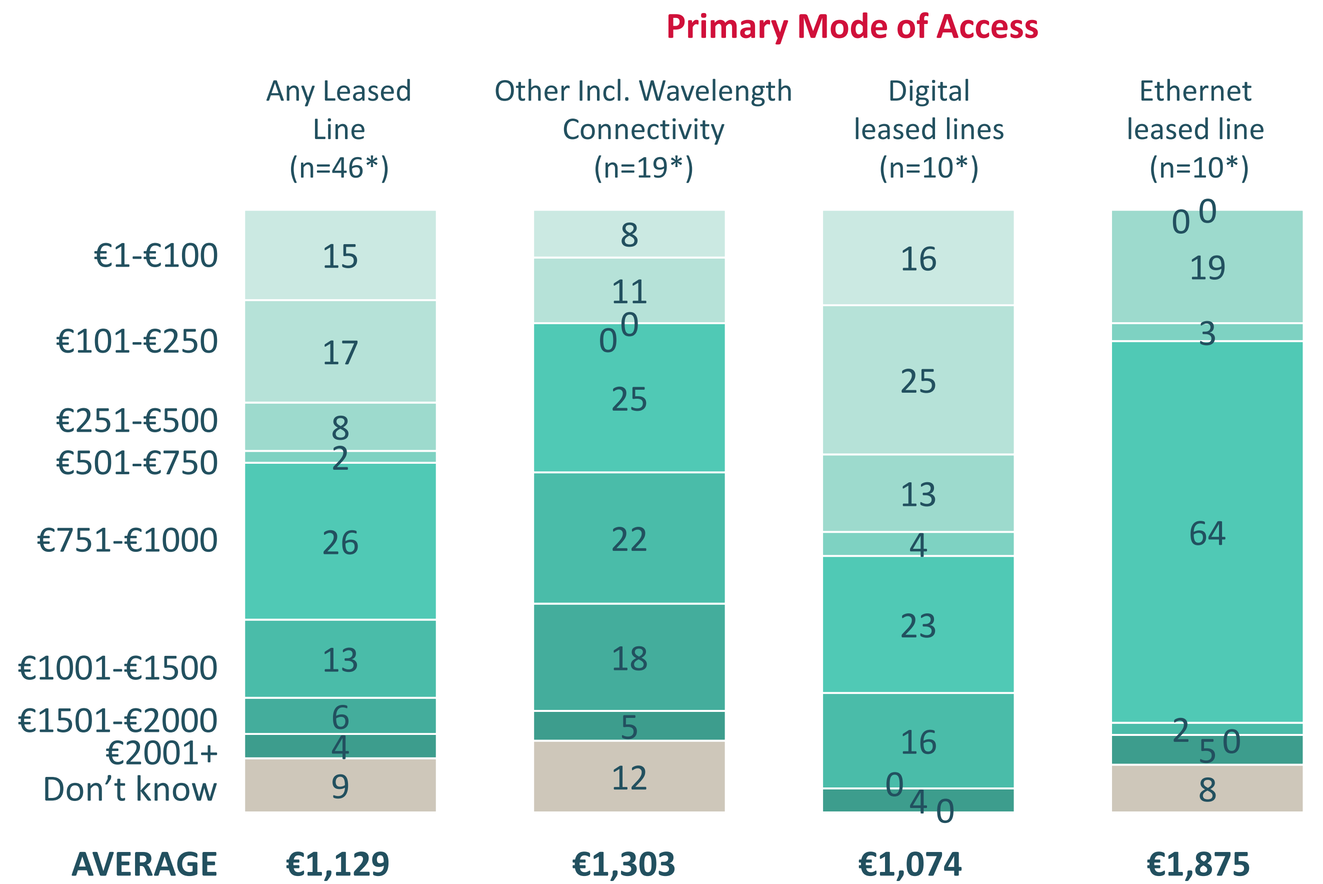
*Caution Small Base

71% of non bundle leased line users are aware of the cost of their service, with a majority (51%) saying they definitely know.

Typical Broadband Spend Per Month – Non Bundle Users

(Base: Total Leased Line Users Who Use A Service Not In A Bundle And Know Costs - 46)

Q.60/Q.127 Excluding any short term introductory offers, typically how much do you pay for this service each month?



*Caution Small Base

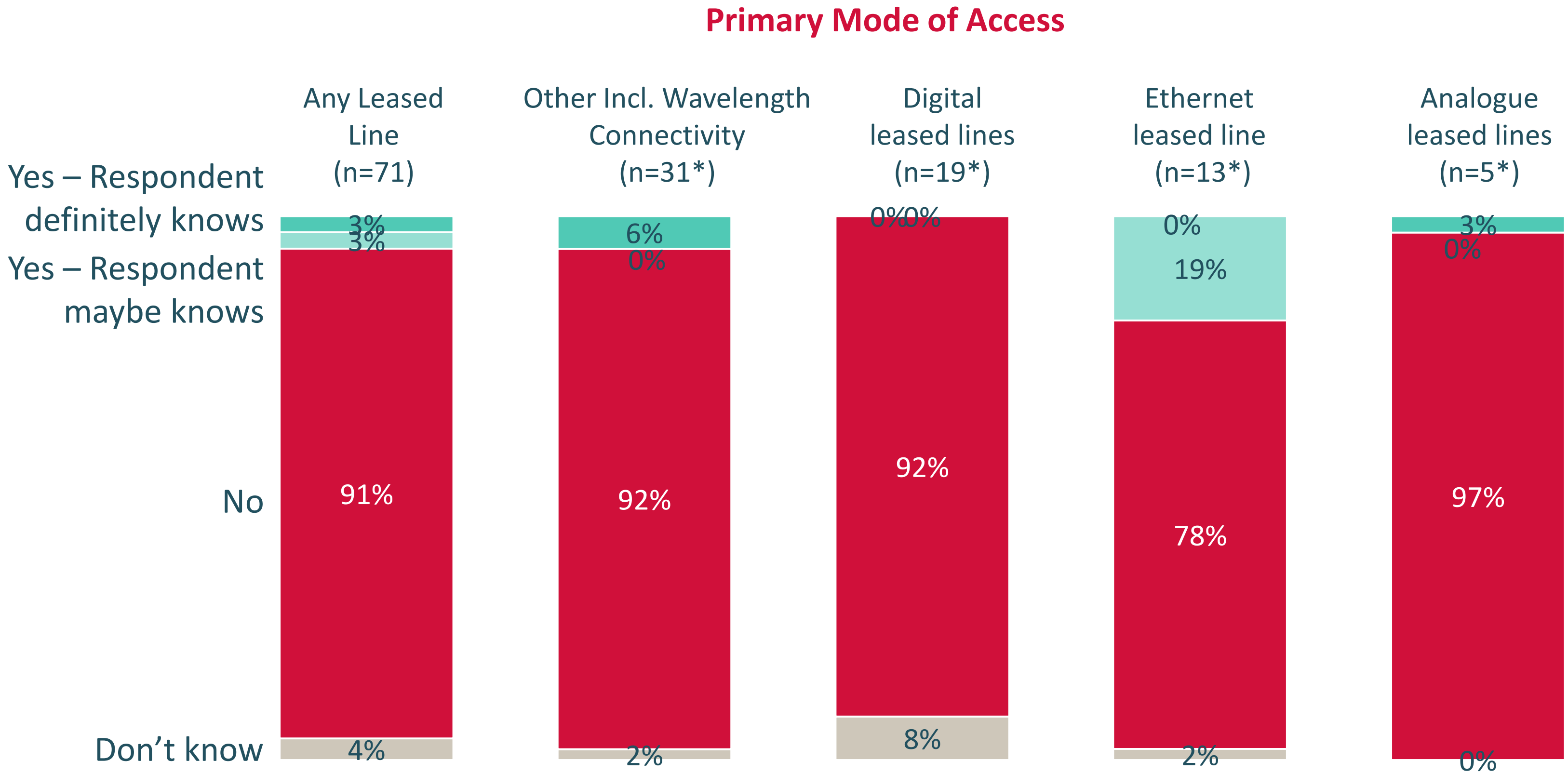
Analogue leased lines base too small to show (4)

The average cost of a non bundle leased line service is €1,129, with 26% claiming their service costs between €751 and €1000.

Knowledge of Additional Cost to Broadband Charges – Non Bundle Users

(Base: Total Leased Line Users Who Use A Service Not In A Bundle, n = 71)

Q.61/Q.128 Does the amount you pay for your leased line service include any additional charges?



Total: Yes	6%	6%	0%	19%	3%

*Caution Small Base

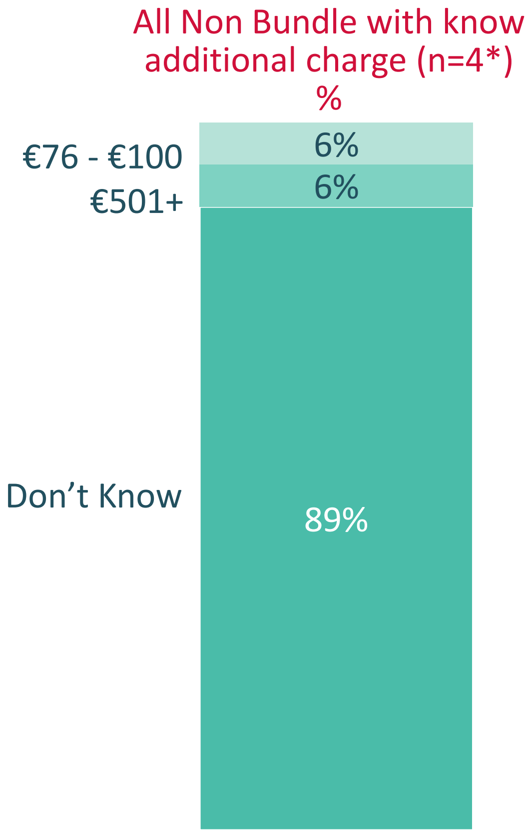
*Too small to show cost breakdown, n = 4)

Just 6% claim their non bundled leased line service includes additional charges.

Typical Spend Per Month (Additional Charges)-Non Bundle Holders

(Base: All leased line bundle who know additional charge– n=4*)

Q.61/129 Can you estimate the cost of these additional charges?



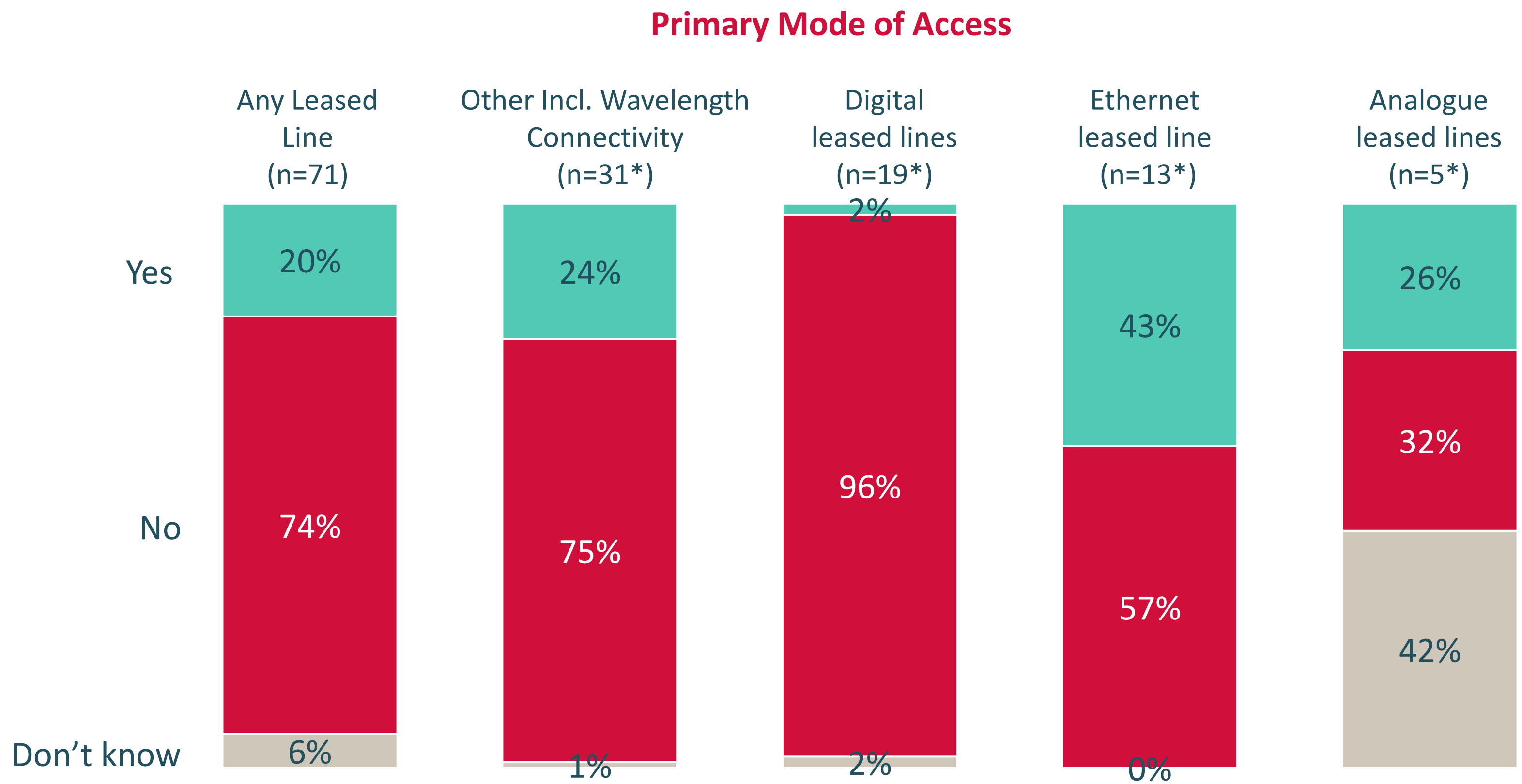
* Small base on this slide

There is a very small base of respondents for analysis in this slide. The majority of non bundle leased line holders who know of additional charges per month do not know specifically how much they are paying.

Non Bundle Users - Previously Bundled Services

(Base: Total Leased Line Users Who Use A Service Not In A Bundle – n=71)

Q.63/Q.130 Did your business previously purchase leased lines with other services in a bundle?



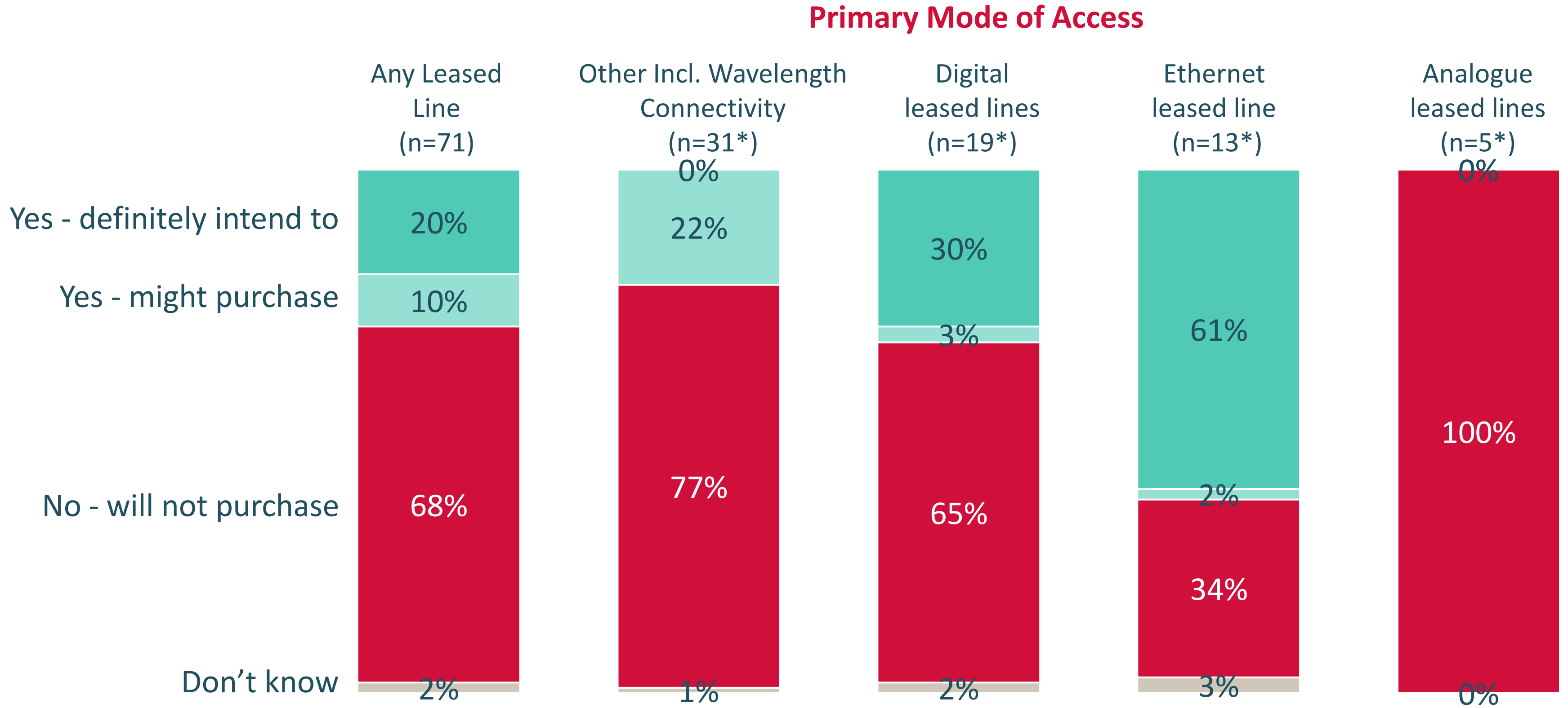
*Caution Small Base
*Caution Access over Mobile Phone too small to show (2)

20% of non bundle leased line users claim to have previously bundled services.

Non Bundle Users - Intention to Bundle

(Base: Total Leased Line Users Who Use A Service Not In A Bundle, n = 71)

Q.64/Q.131 Does your business intend to purchase your leased line service as part of a broader package with other services over the next 12 months?



Total: Yes	30%	22%	33%	63%	0%

*Caution Small Base

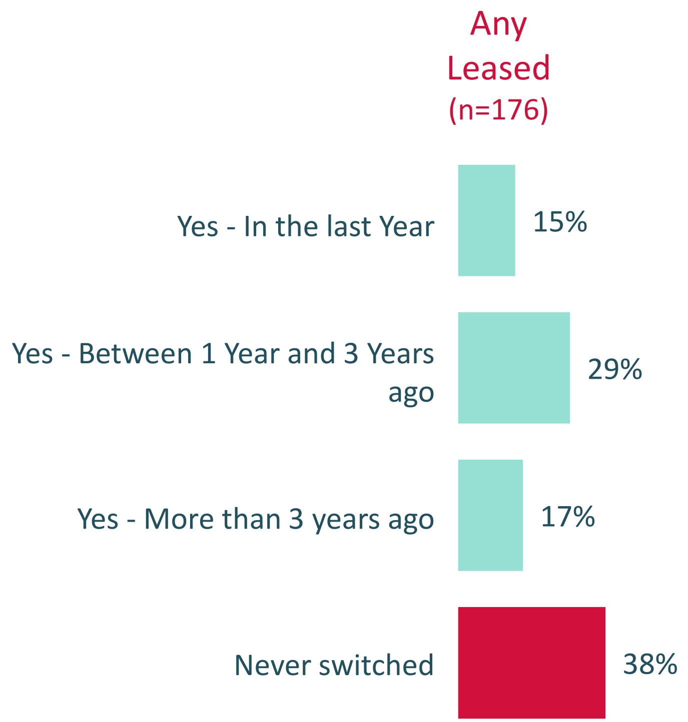
30% of non bundle leased line users claim intention to bundle in future with 20% claiming they definitely intend to do so.

Switching (Leased Line)

Incidence of Switching

(Base: Total Leased Line Users, n=176)

Q.65/Q.132 Have you ever switched your leased line service provider or switched from a broadband service provider within the following time periods?



Primary Mode of Access			
Other Incl. Wavelength Connectivity (n=58)	Digital leased lines (n=51)	Ethernet leased line (n=46*)	Analogue leased lines (n=15*)
12%	21%	10%	28%
36%	29%	21%	31%
27%	5%	14%	10%
24%	45%	55%	31%

*Caution Small Base

62% of Leased line users say they have ever switched, with most (29%) having done so between 1 year and 3 years ago.

Switchers - Previous Means of Access

(Base: Total leased line users who have ever switched, n=102)

Q.66/Q.133 Thinking about your previous leased line and or broadband service provider which of the following access modes did you previously use?

	Total Leased Line Switchers (n=102)	Primary Mode of Access			
		Other Incl. Wavelength (n=38*)	Digital leased lines (n=32*)	Ethernet leased line (n=21*)	Analogue leased lines (n=8*)
Total: Leased Line Options	74%	65%	67%	91%	85%
Digital leased lines	27%	28%	47%	21%	0%
Analogue leased lines	25%	12%	9%	15%	85%
Ethernet Leased Line	21%	17%	3%	70%	0%
Other incl. Wavelength Connectivity	11%	11%	15%	23%	0%
Don't know	9%	11%	11%	0%	15%
Total: Broadband	53%	57%	57%	25%	73%
Fixed broadband (Landline)	42%	33%	50%	23%	73%
Fixed broadband (Fibre)	7%	12%	3%	13%	0%
Internet access over Mobile Phone using 3G\4G data package (non Wi-Fi)	5%	6%	0%	18%	0%
3G\4G Mobile Broadband	4%	4%	2%	10%	0%
Broadband provided by Satellite	3%	3%	1%	10%	0%
Fixed broadband (Cable)	3%	3%	0%	10%	0%
Fixed BB (Wireless Connection)	2%	0%	2%	10%	0%
Any other form of broadband connection	3%	8%	1%	0%	0%

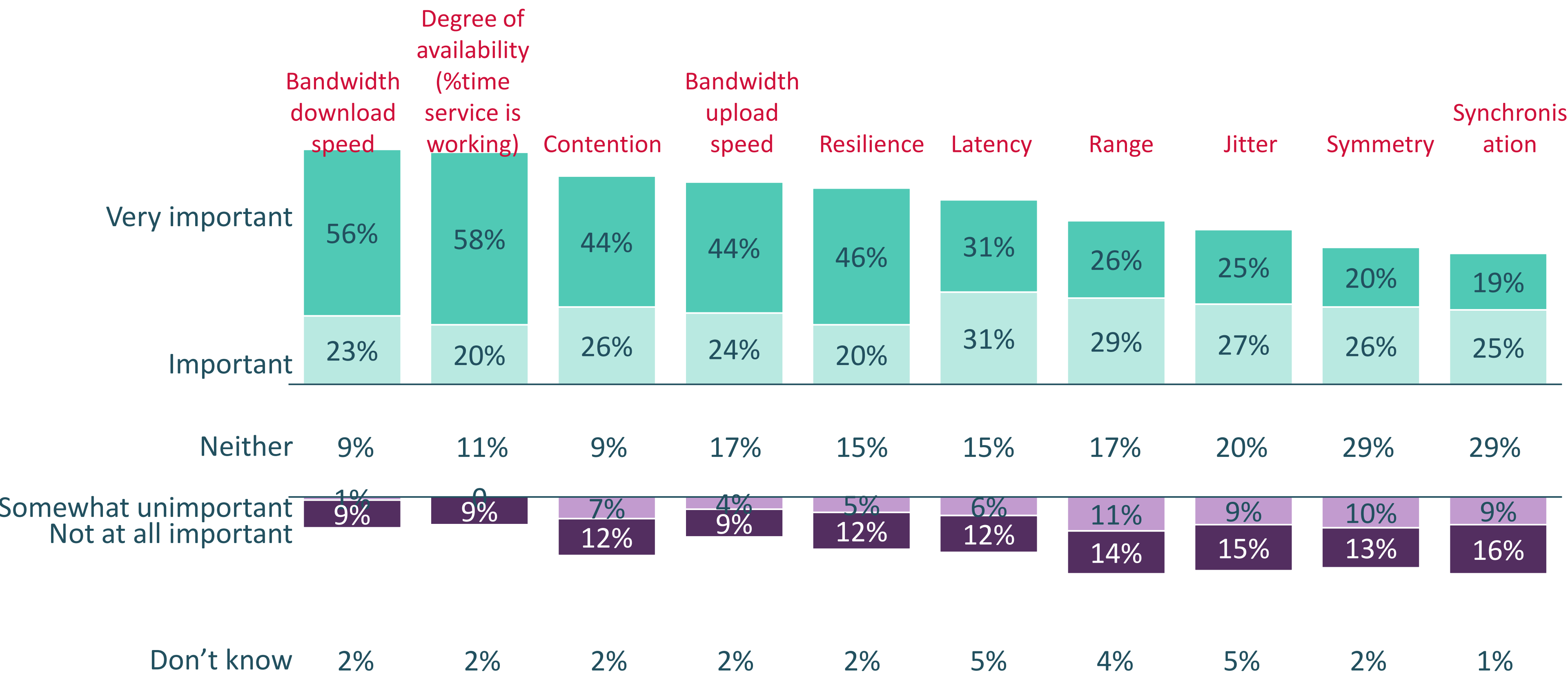
*Caution Small Base

74% of leased line users have switched from leased lines, with 53% having switched from broadband.

Switchers (Leased Line) - Importance in Decision to Switch

(Base: Leased Line users who have switched provider, n = 102)

Q.68 Thinking about your primary/main leased line service are you currently tied into a contract with your service provider?



Total: Important	79%	78%	70%	68%	66%	62%	55%	51%	46%	44%

Download Speed is the most important factor for Leased line users who have switched provider, with Synchronisation least important for these businesses.

Previously Bundled Services, What was included

(Base: Total leased line users who have ever switched – 102)

Q.68/Q.135 How important are these options in your decision to switch?

	Any Leased Line (n=102)	Primary Mode of Access			
		Other Incl. Wavelength Connectivity (n=38*)	Digital leased lines (n=32*)	Ethernet leased line (n=21*)	Analogue leased lines (n=8*)
Bandwidth download speed	79%	94%	74%	77%	68%
Degree of availability (%time service is working)	78%	78%	95%	79%	65%
Contention	70%	86%	68%	77%	53%
Bandwidth upload speed	68%	90%	68%	45%	53%
Resilience	66%	76%	70%	79%	37%
Latency	62%	72%	67%	64%	43%
Range	55%	45%	66%	53%	65%
Jitter	51%	51%	66%	42%	53%
Symmetry	46%	68%	42%	42%	23%
Synchronisation	44%	59%	47%	33%	23%

*Caution Small Base

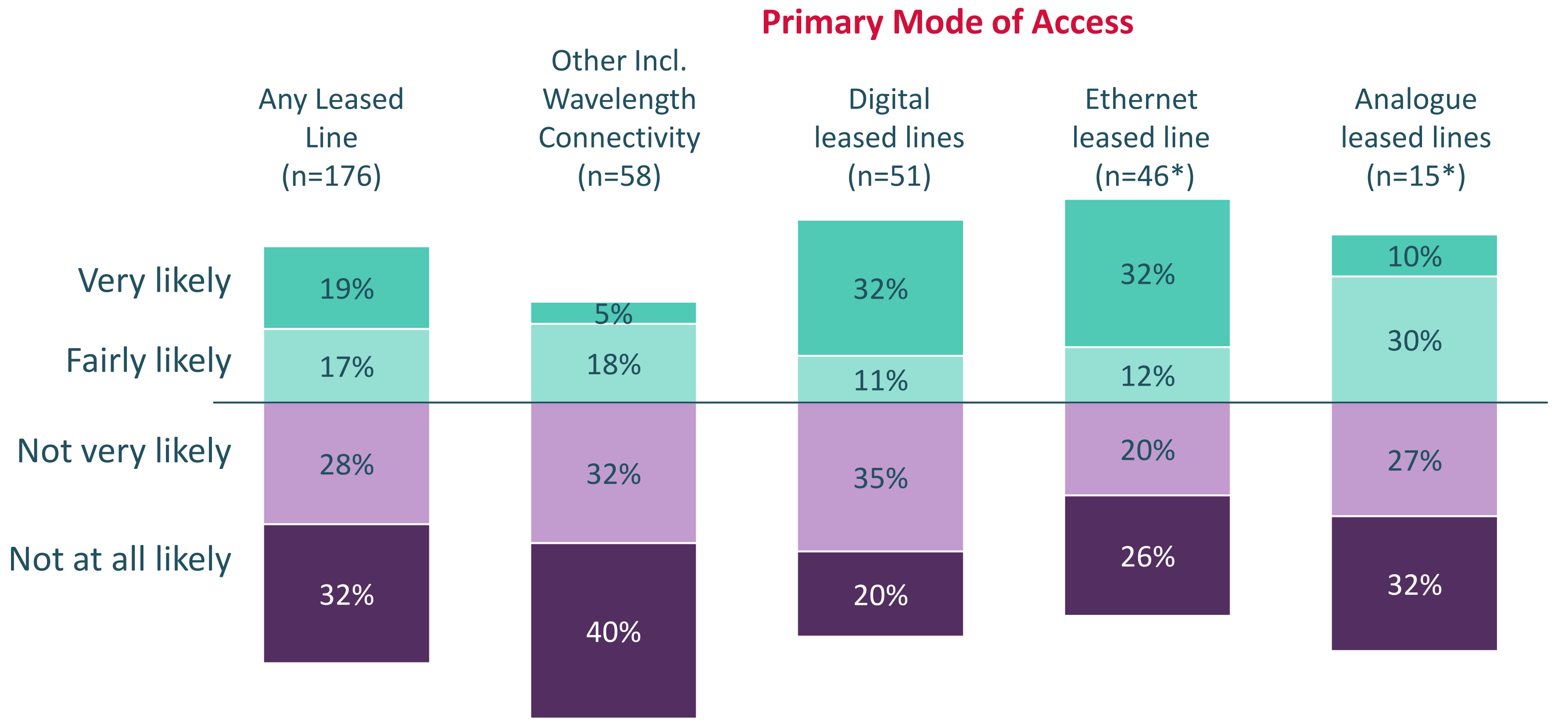
The importance of download speed is seen across all access types, although the degree of availability (%time service is working) takes on increasing importance for digital leased line users.

REDC

Likelihood to Switch - Next 12 - 18 Months

(Base: Total Leased Line Users, n=176)

Q.69/Q.136 How likely are you to consider switching leased line service provider within the next 12 - 18 months?



	Any Leased Line (n=176)	Other Incl. Wavelength Connectivity (n=58)	Digital leased lines (n=51)	Ethernet leased line (n=46*)	Analogue leased lines (n=15*)
Don't know	4%	5%	2%	10%	2%
Total: Yes	36%	23%	44%	44%	40%

*Caution Small Base

36% of leased line users say they are likely to switch within the next 12 – 18 months.

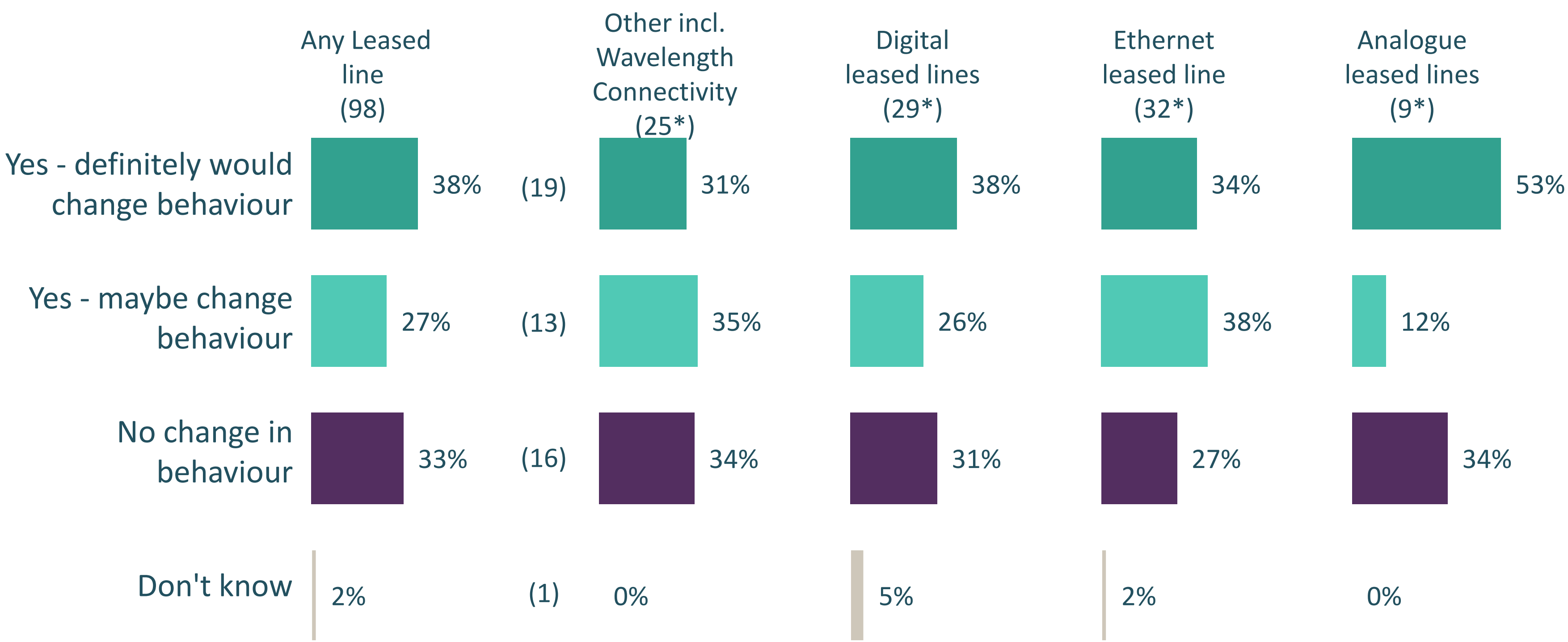
REDC

SSNIP Bundle (Leased Line)

Response to 10% Increases in Leased Line – Leased Line Bundle Users

(Base: Total Leased Line Users in bundle – n=98)

Q.S11/Q.S31 Do you believe that your business would change your actual purchasing behaviour with respect to your leased line service?



( ) Figures in brackets relate to total actual figures

* -small base

65% of leased line bundle businesses are likely to switch given a 10% increased in cost of leased line.

Response to 10% Increase Leased Line Cost – LL Bundle Owners

(Base: Total leased line bundle owners who would change behaviour – n=61)

Q.S12/Q.S32 What your business would be most likely to do in response to this hypothetical price increase of your leased line service?

	Any Leased line (61)		Other incl. Wavelength Connectivity (17*)	Digital leased lines (18*)	Ethernet leased line (19*)	Analogue leased lines (6*)
Total: Cancel the service	80%	(25)	56%	83%	96%	88%
Cancel LL portion of bundle to a different supplier	39%	(12)	28%	30%	51%	49%
Cancel the service and switch total bundle different supplier	28%	(9)	25%	24%	28%	39%
Cancel the service and switch to BB	11%	(4)	0%	27%	16%	0%
Cancel the service completely	1%	(5)	3%	2%	1%	0%
Total: Keep the service	15%	(-)	41%	15%	0%	0%
Keep the service (and downgrade to a cheaper service with same supplier)	9%	(3)	25%	15%	0%	0%
Keep the service (do nothing)	6%	(2)	16%	0%	0%	0%
I\We would do something else	4%	(1)	3%	1%	2%	12%
Don't know	1%	(-)	0%	2%	2%	0%

( ) Figures in brackets relate to total actual figures

* -Small Base Size

80% of leased line bundle businesses who will change behaviour given 10% increase are likely to cancel service

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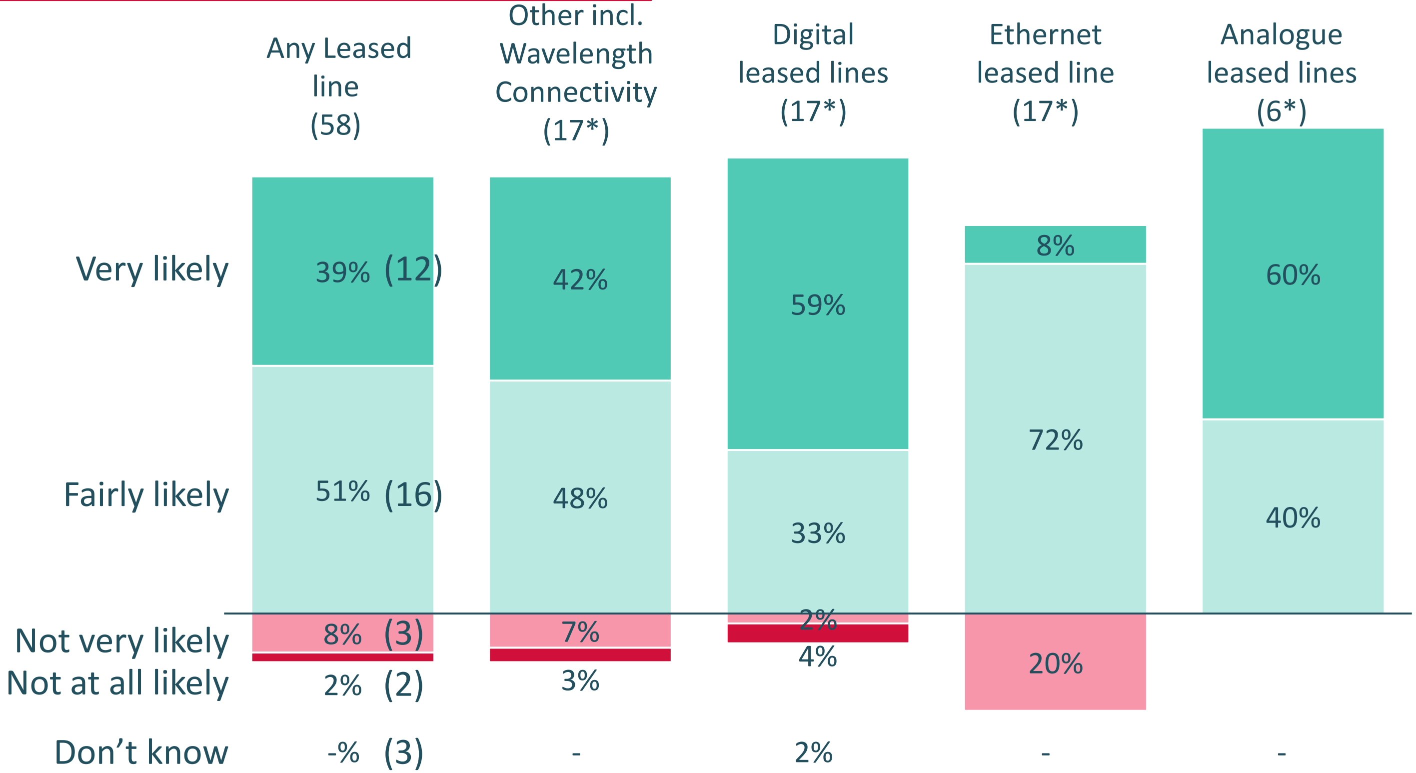
Likelihood To Follow Through With Any Change In Behaviour – Leased Line Bundle Owners

(Base: Total Leased Line bundle owners who will change behaviour – n=58)

Q.S13/Q.S33 How likely is your business to carry out any of the stated actions?



Total Likely	90% (28)	90%	92%	80%	100%

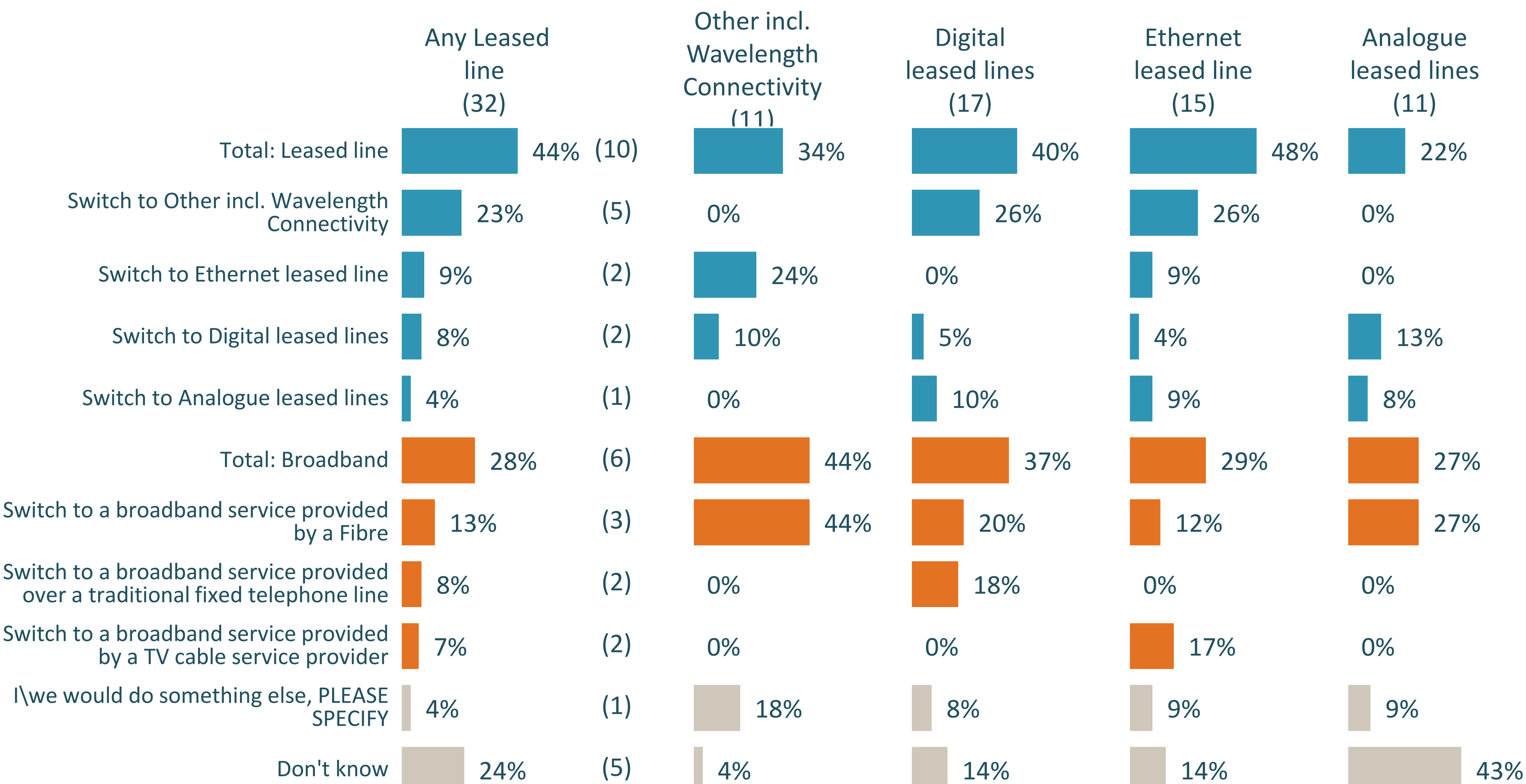
( ) Figures in brackets relate to total actual figures
*Small Base Size

90% of leased line bundle businesses who claim they would switch their service given a 10% increase in price are likely to do so.

Service Likely to Switch To – Leased Line Bundle Switchers

(Base: All Leased Line Bundle and are likely to switch after price change -32)

Q.S14 You have just said that you would _____ meaning you would give up your __. Which type of broadband or leased line service would your business be most likely to switch to?



( ) Figures in brackets relate to total actual figures

NOTE: SMALL BASE ENTIRE CHART

44% of leased line bundle switchers are likely to switch to another leased line service with 28% likely to switch to broadband and 24% were unsure.

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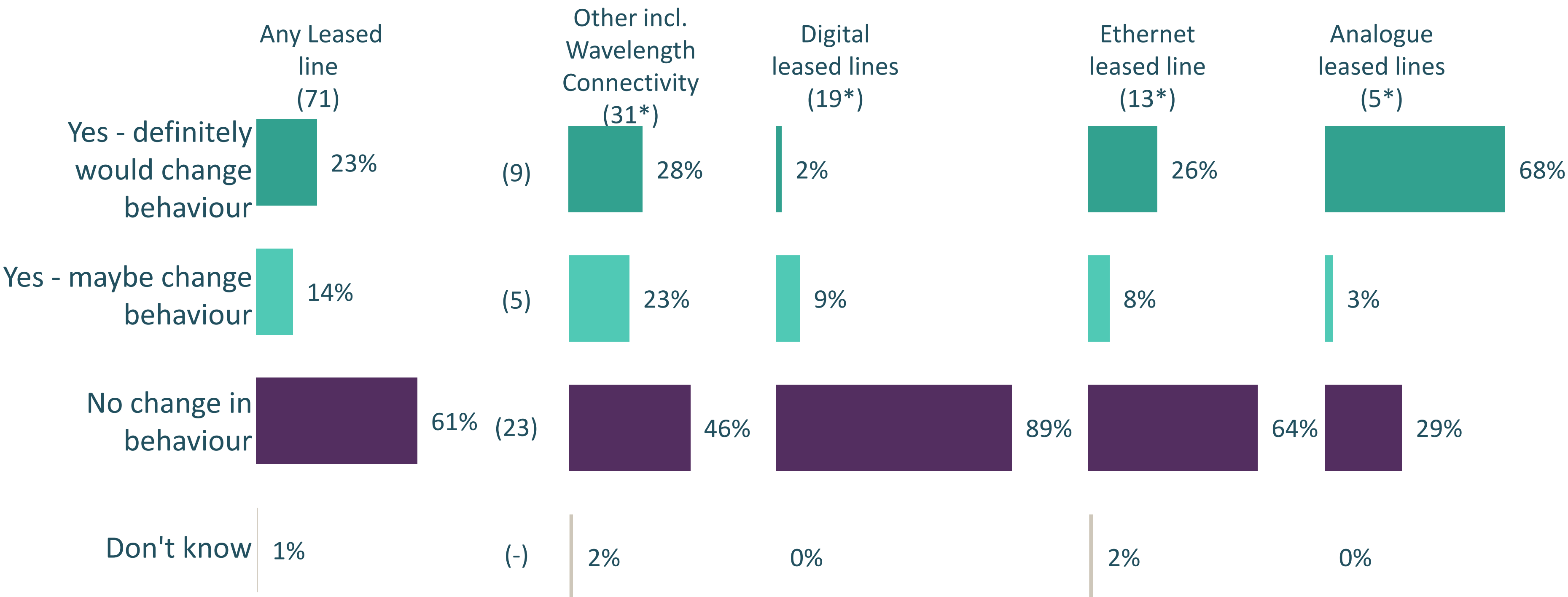
SSNIP Non - Bundle (Leased Line)

Response to 10% Increases in Leased Line – Non Bundle Owners Users

(Base: Total Leased Line Non Bundle – n=71)

Q.S16 Do you believe that your business would change your actual purchasing behaviour with respect to your leased line service?



( ) Figures in brackets relate to total actual figures

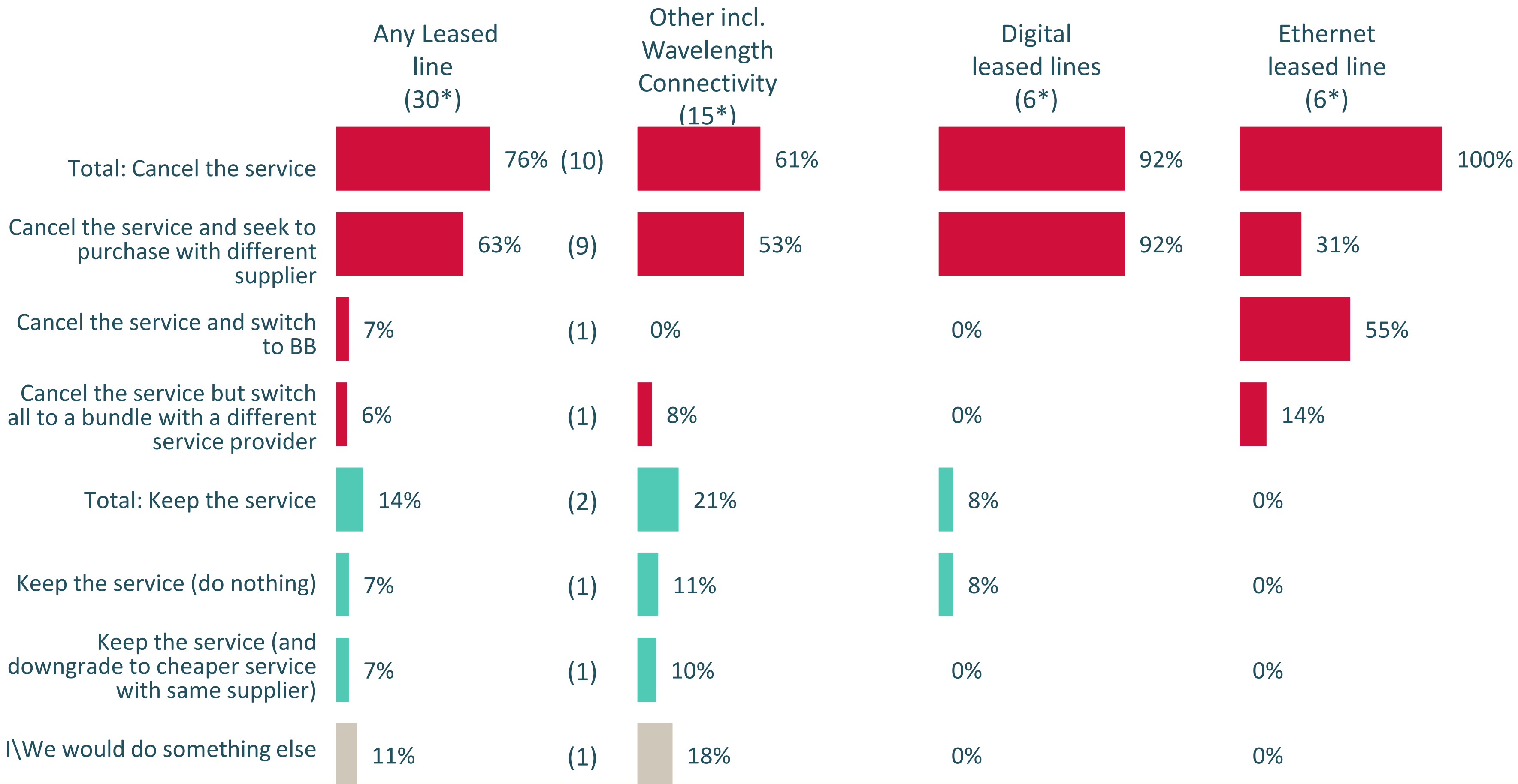
* -Small Base Size

37% of leased line non bundle users would likely change behaviour if there was a 10% increase in the cost of their leased line service.

Response to 10% Increase Leased Line Cost – Non Bundle Users

(Base: Total leased line users who use a service as part of package and may change behaviour -30)

Q.S17 What your business would be most likely to do in response to this hypothetical price increase of your leased line service?



( ) Figures in brackets relate to total actual figures

*Small Base Size

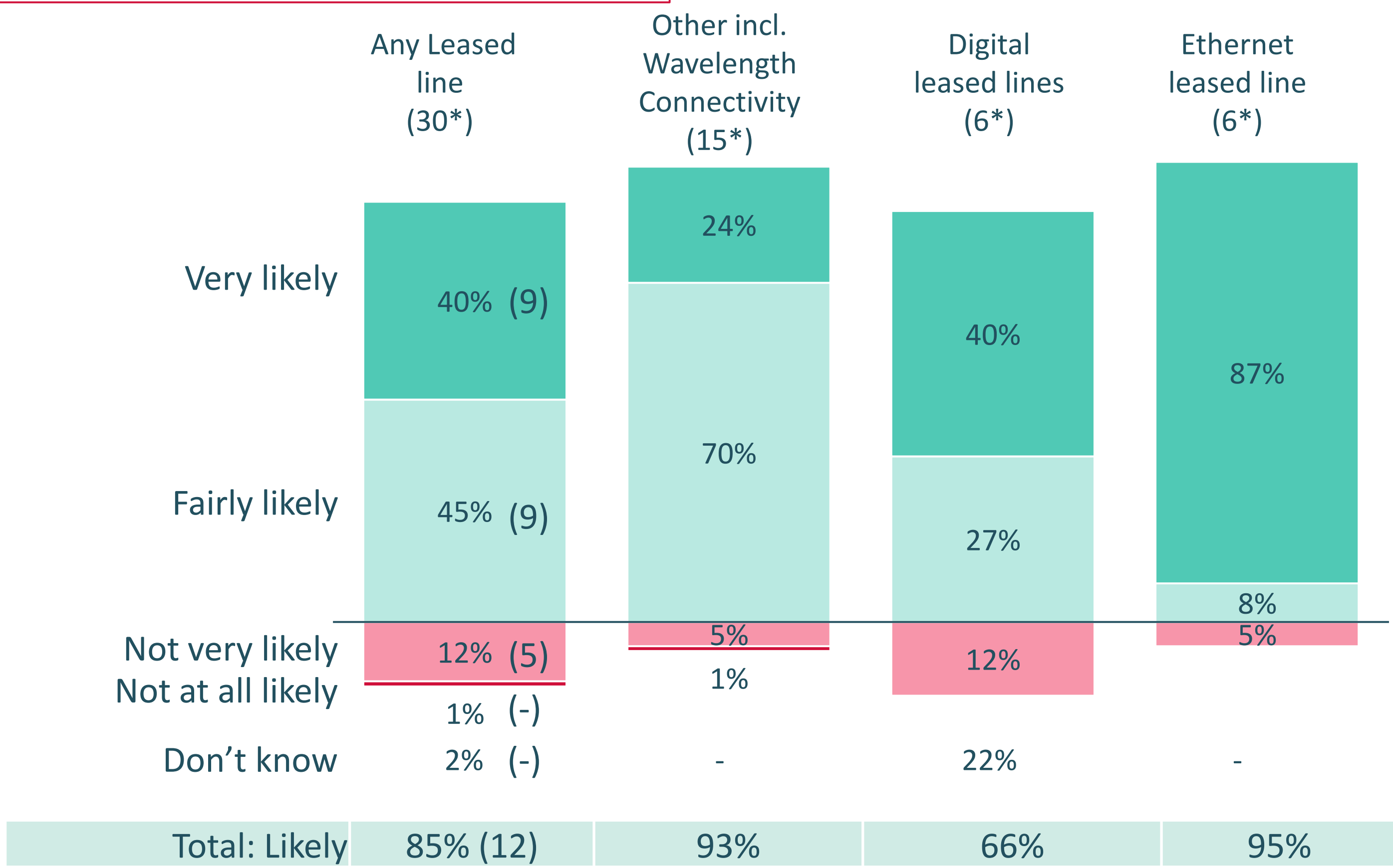
Analogue Leased Line n =3

76% of leased line non bundle businesses who will change behaviour given 10% increase are likely to cancel service.

Likelihood To Follow Through With Any Change In Behaviour – Leased Line Non Bundle Owners

(Base: Total Leased Line non bundle owners who will switch service – n=30*)

Q.S18/Q.S33 How likely is your business to carry out any of the stated actions?



( ) Figures in brackets relate to total actual figures

NOTE: SMALL BASE ENTIRE CHART

85% of leased line non bundle businesses who claim they will switch their service given a 10% increase in price are likely to do so.

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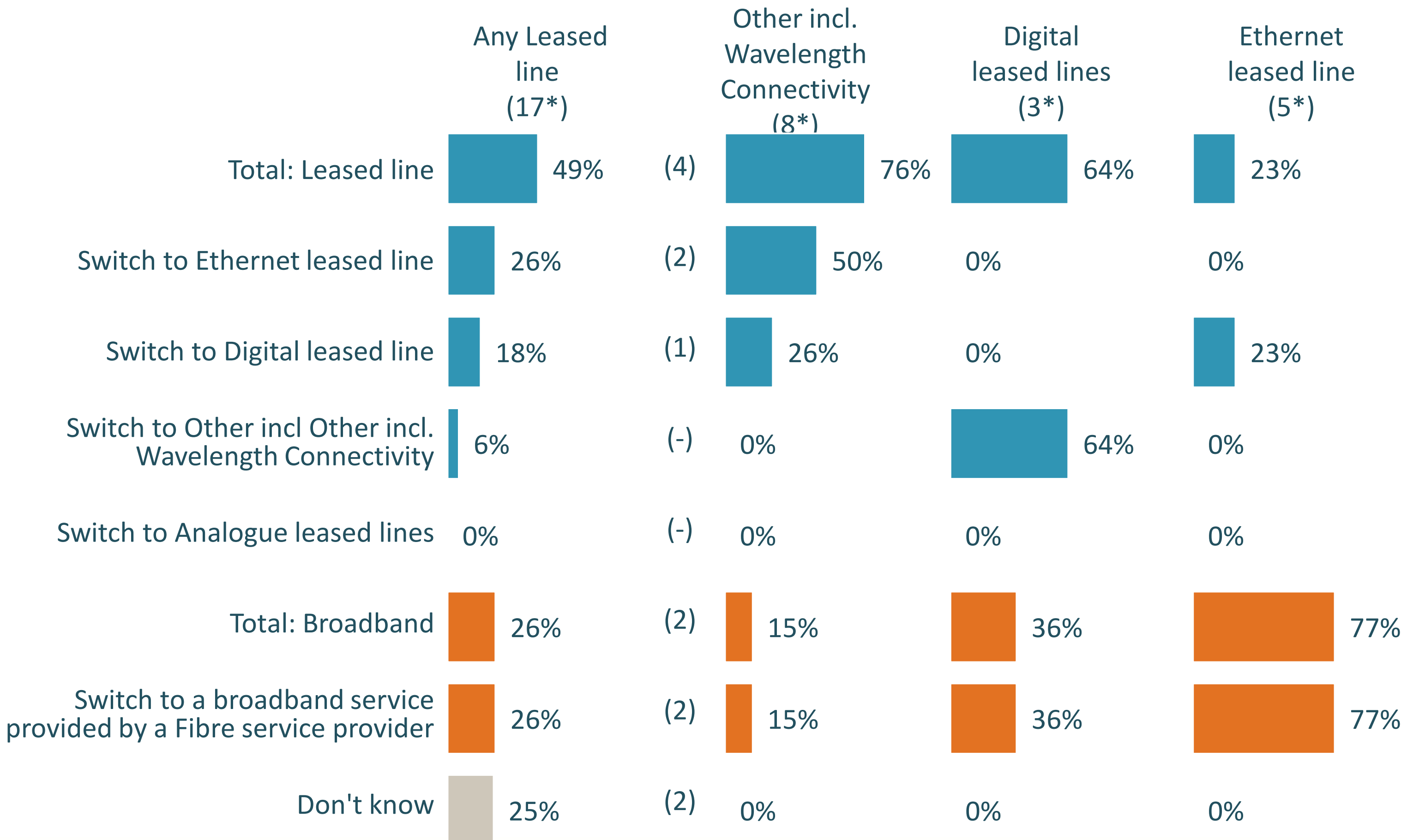
Service Likely to Switch To – Leased Line Non Bundle Switchers

(Base: All Leased Line Bundle and are likely to switch after price change – n=17)

Q.S19 You have just said that you would _____ meaning you would give up your __. Which type of broadband or leased line service would your business be most likely to switch to?



( ) Figures in brackets relate to total actual figures

NOTE: SMALL BASE ENTIRE CHART

49% of leased line non bundle switchers are likely to switch to another leased line service with 26% likely to switch to broadband and 25% were unsure.

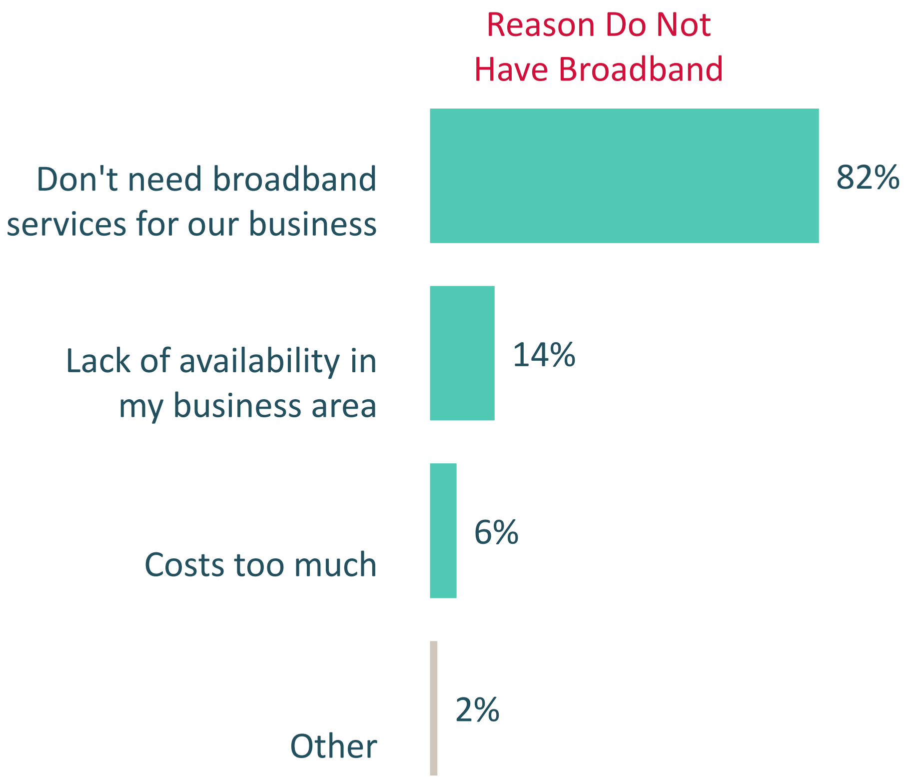
(Q.s2/s22/s12/s32)

Those Who Do Not Use Broadband Or Leased Line

Reason Do Not Have Broadband

(Base: All not using broadband services - 120)

Q.141 Why do you not have broadband access for your business?



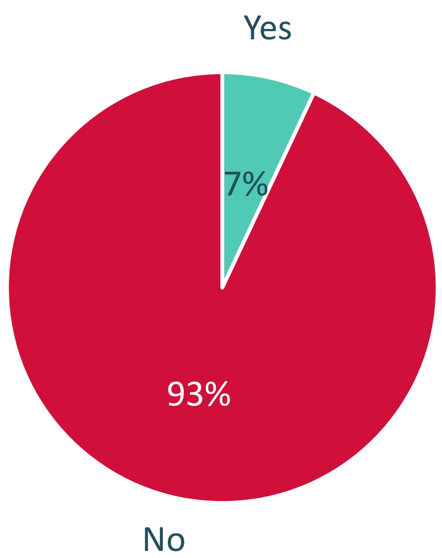
82% of those without broadband do not have it as they do not require it for their business. This opinion was expressed only in the Micro business sector.

Did You Ever Have Broadband Access in Your Business?

(Base: All non broadband owners - 120)

Q.142 Did you ever have broadband access in your business?

Ever Had Broadband Access?

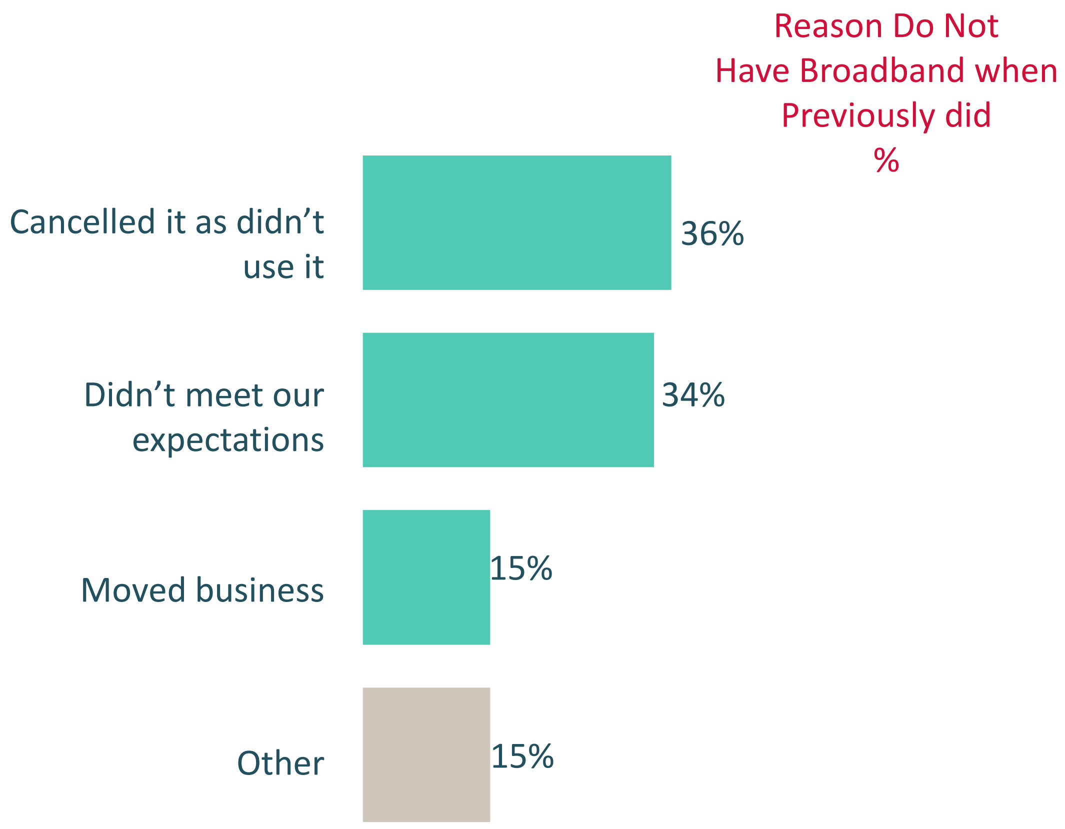


7% of businesses currently without broadband access ever had broadband for their business in the past.

Reason Do Not Have Broadband When Previously Did

(Base: All not using broadband services – 8*)

Q.143 Why do you not have broadband access for your business when previously you did?



NOTE: SMALL BASE ENTIRE CHART

The base size in this slide is very small. Business who do cancel broadband did so as they didn’t use it or it didn’t meet their expectations.

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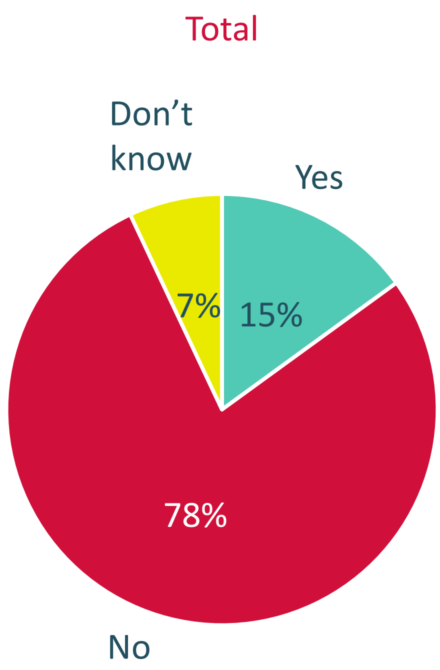
Plan on Getting Broadband In The Next 12 Months?

(Base: All not using broadband services - 120)

Q.144 Do you plan on getting broadband access for your business in the next 12 months?

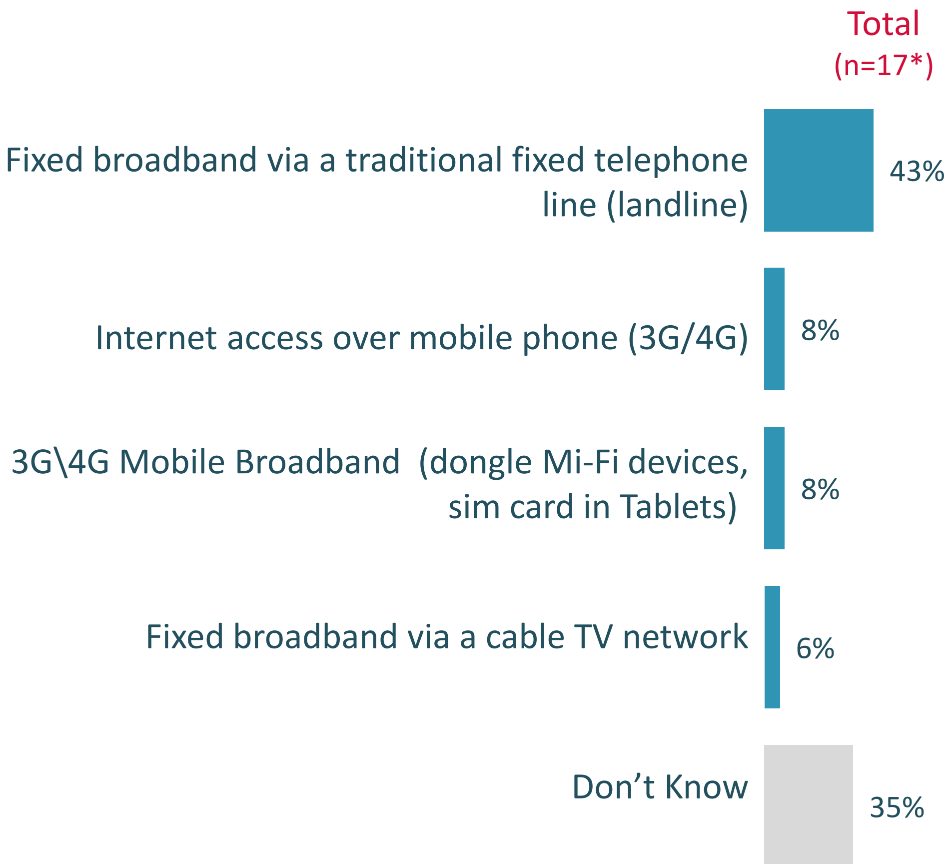


15% of businesses currently without broadband access plan on getting broadband for their business in the next 12 months.

What Form of Access Are You Most Likely to Get?

(Base: All not using broadband but considering it, N= 17*)

Q.145 Can you tell me which broadband mode of access you would consider?



* = SMALL BASE

Many businesses considering getting broadband are likely to seek broadband via traditional fixed line telephone (43%). 35% however, were unsure of what type of broadband they would consider getting.

Reason Do Not Have Leased Line

(Base: All not using Leased Line services - 956)

Q.149 Why do you not have leased line access for your business?

	Any Without Leased Line (956)	BB fixed landline (541)	BB Fibre network (111)	BB cable TV (50)	Mobile BB (57)	BB Satellite (33*)	Fixed Wireless (25*)	Mobile Phone (7*)
Don't need leased line services or our business	51%	47%	48%	57%	49%	18%	76%	85%
Lack of availability in my business area	15%	13%	8%	10%	43%	42%	10%	15%
Costs too much	13%	14%	20%	18%	8%	11%	7%	0%
Never heard of it before	12%	14%	15%	8%	5%	18%	10%	0%
Never though of it	1%	2%	0%	3%	0%	0%	0%	0%
Never offered to us	1%	1%	2%	0%	0%	0%	5%	0%
Other	4%	5%	4%	5%	2%	2%	0%	0%
Don't know	8%	10%	9%	3%	0%	11%	0%	0%

(Base: Small Base)

51% of businesses without a leased line do not have one as it is not required for the business. Availability (15%), cost (13%) and lack of awareness (12%) are also reasons for not having a leased line service.

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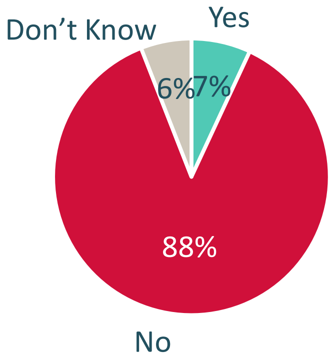
Did You Ever Have Leased Line (Current Non Leased Line Owners)

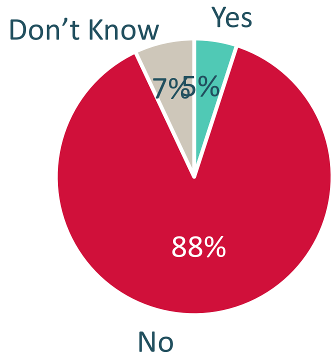
(Base: All non leased line holders - 956)

Q.150 – Did you ever have a leased line?

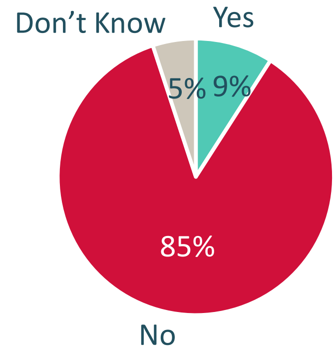
Any Without Leased Line
(956)



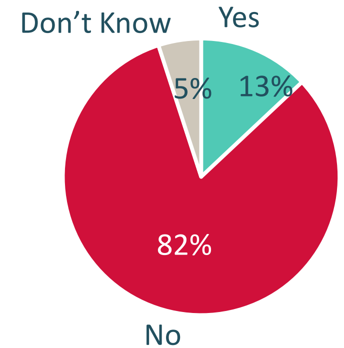
Fixed BB fixed landline
(541)



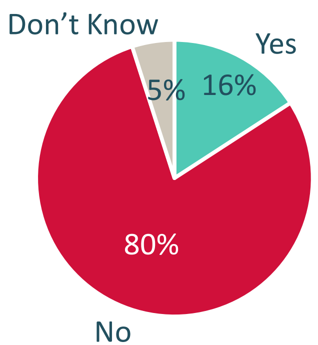
BB Cable Network
(50)



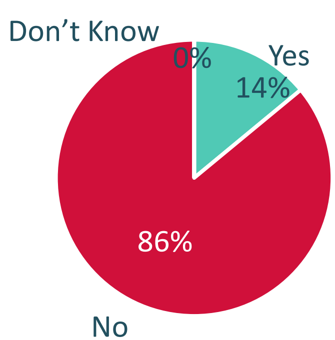
BB Fibre Network
(111)



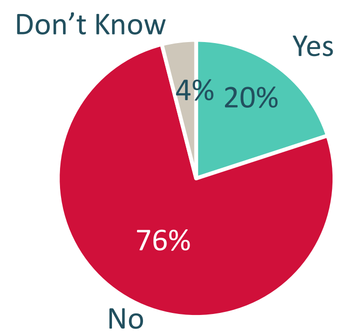
Mobile BB
(57)



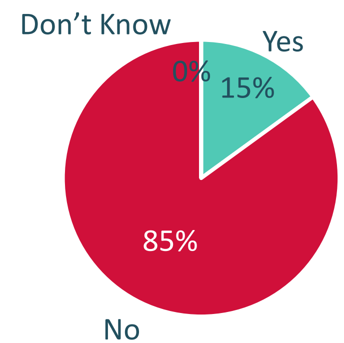
BB Satellite
(33*)



Fixed Wireless
(25*)



Mobile Phone
(7*)



* - Small Base

94% of business currently without a leased line have never previously had a leased line or don't know if the business had one.

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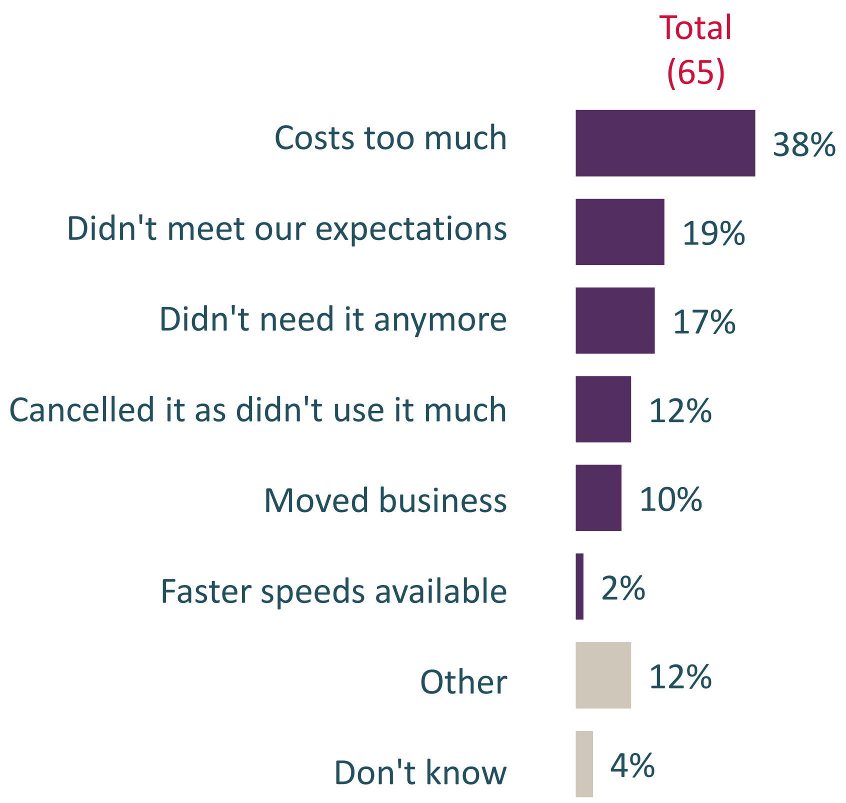
Reason Do Not Have Leased Line when previously did have it – Multiple Responses

(Base: All not using Leased Line services who previously did - 65)

Q.151 Why do you not have leased line access for your business when previously you did have it?

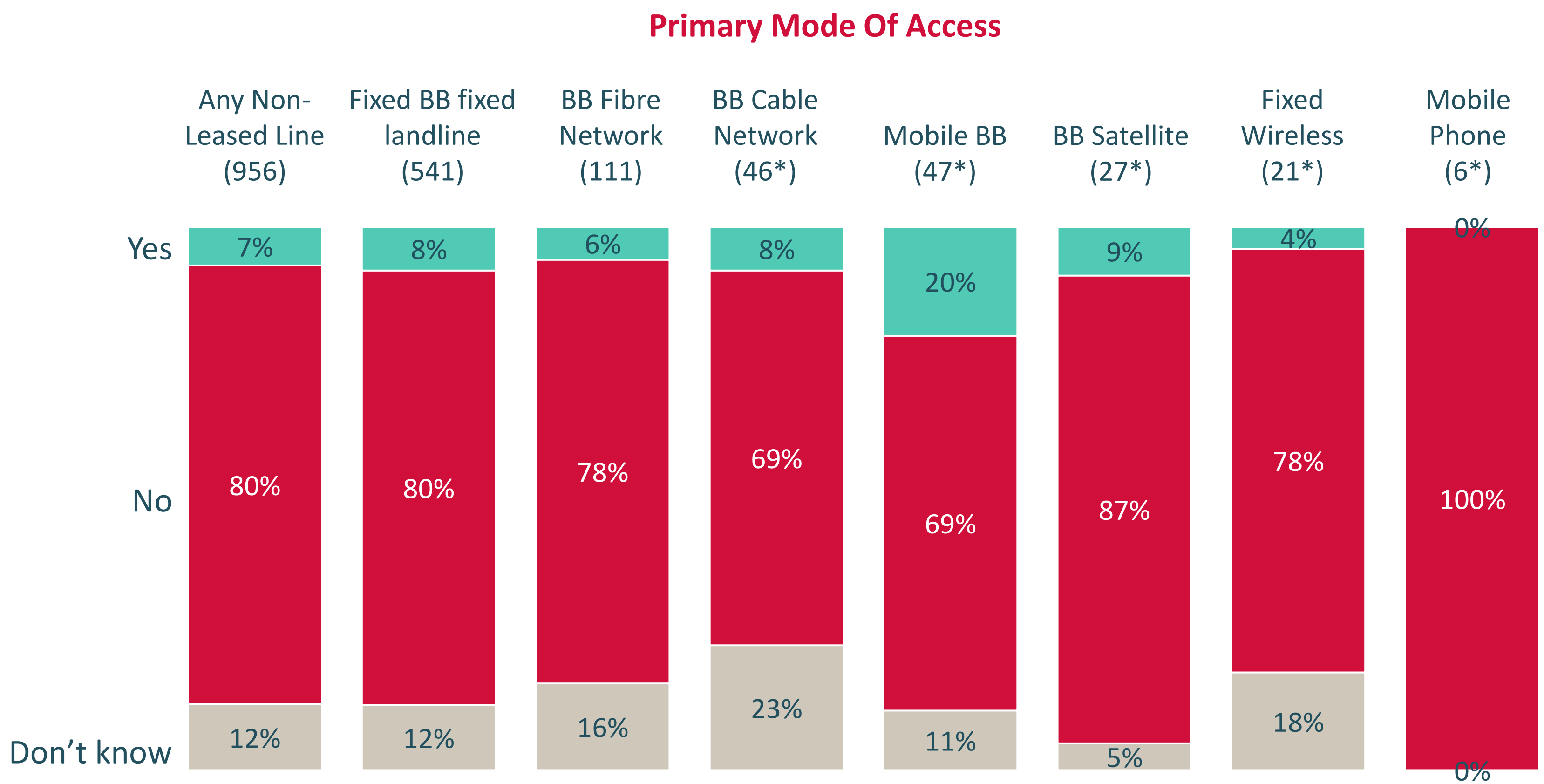


The primary reasons for previous leased line owners cancelling their leased line is cost (38%).

Plan on Getting Leased Line in the Next 12 Months?

(Base: All not using Leased Line services - 956)

Q.152 Do you plan on getting leased line access for your business in the next 12 months?



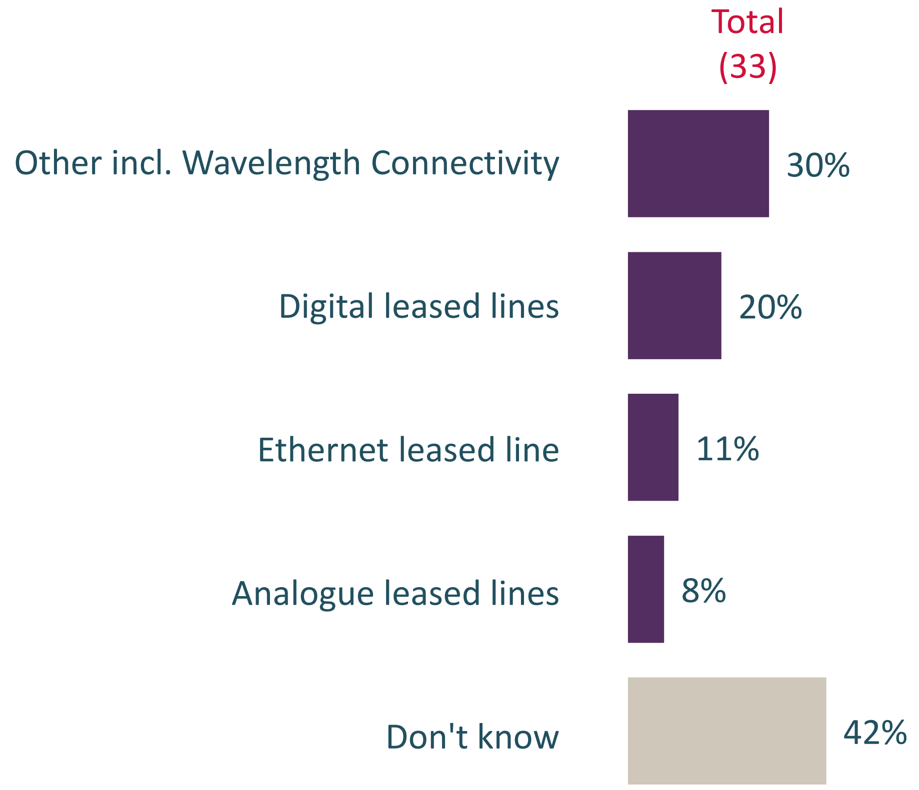
* Small Base

The percentage of business without leased lines and planning on getting leased lines in the next 12 months is low at 7%.

Intended Future Leased Line uptake*

(Base: All not using Leased Line services and intending to get Leased line in future - 33)

Q.155 You mentioned that you are planning on getting leased line access for your business in the next 12 months. Can you tell me which leased line mode of access you would consider?



*Small Base

Other incl. wavelength connectivity is the leased line type most likely to be purchased in the future (30%).

THANK YOU

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