ComReg Trends Survey Q2 2006

Survey Results, July 2006

Prepared by Amárach Consulting

Contents

Introduction

Introduction

- The research contained in this report is based on a quarterly survey by Amárach Consulting of 1,017 adults throughout Ireland, aged 15-74.

- The survey was conducted from April 24th – May 21st 2006, and the results have been weighted up to the total adult population aged 15-74 using the most recent CSO statistics.

- This quarter's report looks at trends in:

  - Fixed & Mobile Phone Usage
  - Internet Usage
  - International Mobile Roaming

- In presenting the findings we have taken care to report the sample sizes for each question analysed and we would draw the reader's attention to the table at the end of this report explaining the statistical variance applicable to all survey based studies of this nature.

- It should be noted that the data contained within this report is based on the responses provided by survey participants, and while providing useful insight into residential consumer experiences, it is not directly comparable to data collected from electronic communications operators as presented in the ComReg Quarterly Report

Fixed Phone Usage

Key Findings

- Survey results suggest that fixed line penetration in the home is still declining, albeit slowly. Younger respondents (39%) and those in the rental sector (28%) are least likely to have a fixed line subscription.

- 1 in 3 have their fixed line number registered as ex-directory. Women and older age groups i.e. 45 + are most likely to have ex-directory numbers.

- Overall 15% of fixed line households have switched fixed line providers at least once in the last 12 months.

- Over 9 in 10 receive their phone bill by post. Those who receive their bill electronically are more likely to be aged 25-44 years of age and living in Connaught/Ulster.11% of those receiving their bill by post said that they would be interested in receiving it electronically.

- Eircom continues to be the largest fixed line operator in the market, with over 8 in 10 fixed line customers using them.

- This survey was conducted between April and May 2006, before Smart Telecom's withdrawal from the narrowband market.

Key Findings

- Average fixed line spend stands at just over €100 every two months. Spend is higher among younger age groups, those conducting business from their home address, and those with internet access.   It is also higher than average among those with mobile phones.

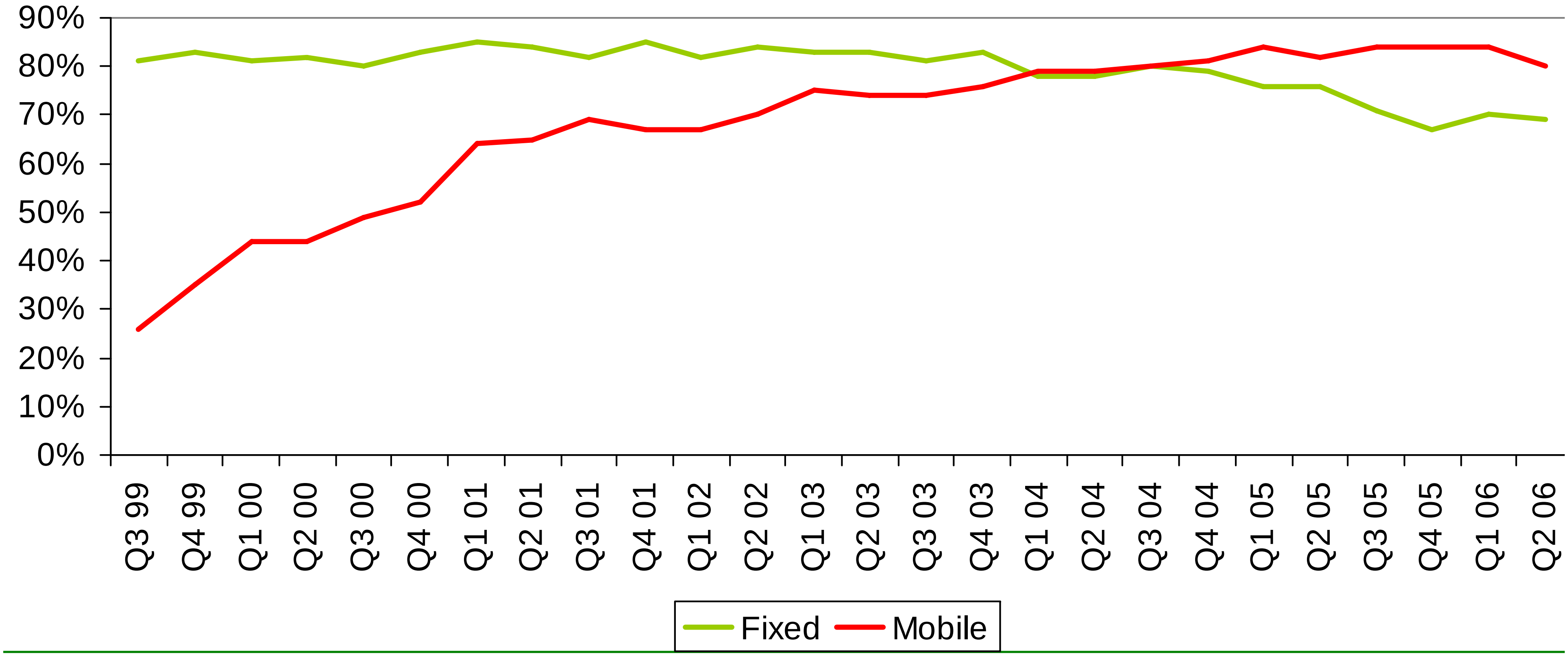
- Six in 10 fixed line households are aware of more than one provider of directory enquiries in Ireland, with Eircom's 11811 number being the most frequently used.

- 1 in 3 subscribe to bundled services with half of these getting their line rental and fixed line calls bundled together.

Mobile & Fixed Penetration
Base: All Respondents, N = 1,017

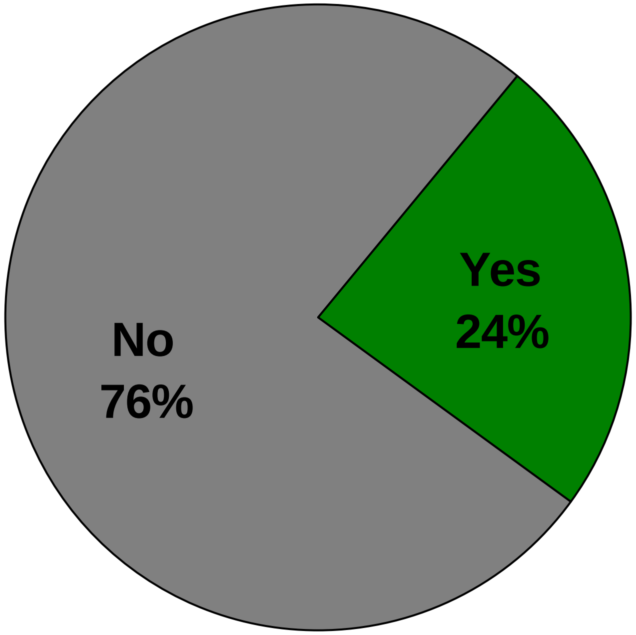
% of consumers with Fixed Line Phone vs. % with Mobile Phone

Mobile Level: 80%
Fixed Line Level: 69%



Source: ComReg Trends Survey, 1999-2006

Incidence of Previous Fixed Line Ownership
Base: No Residential Landline Now, N = 320

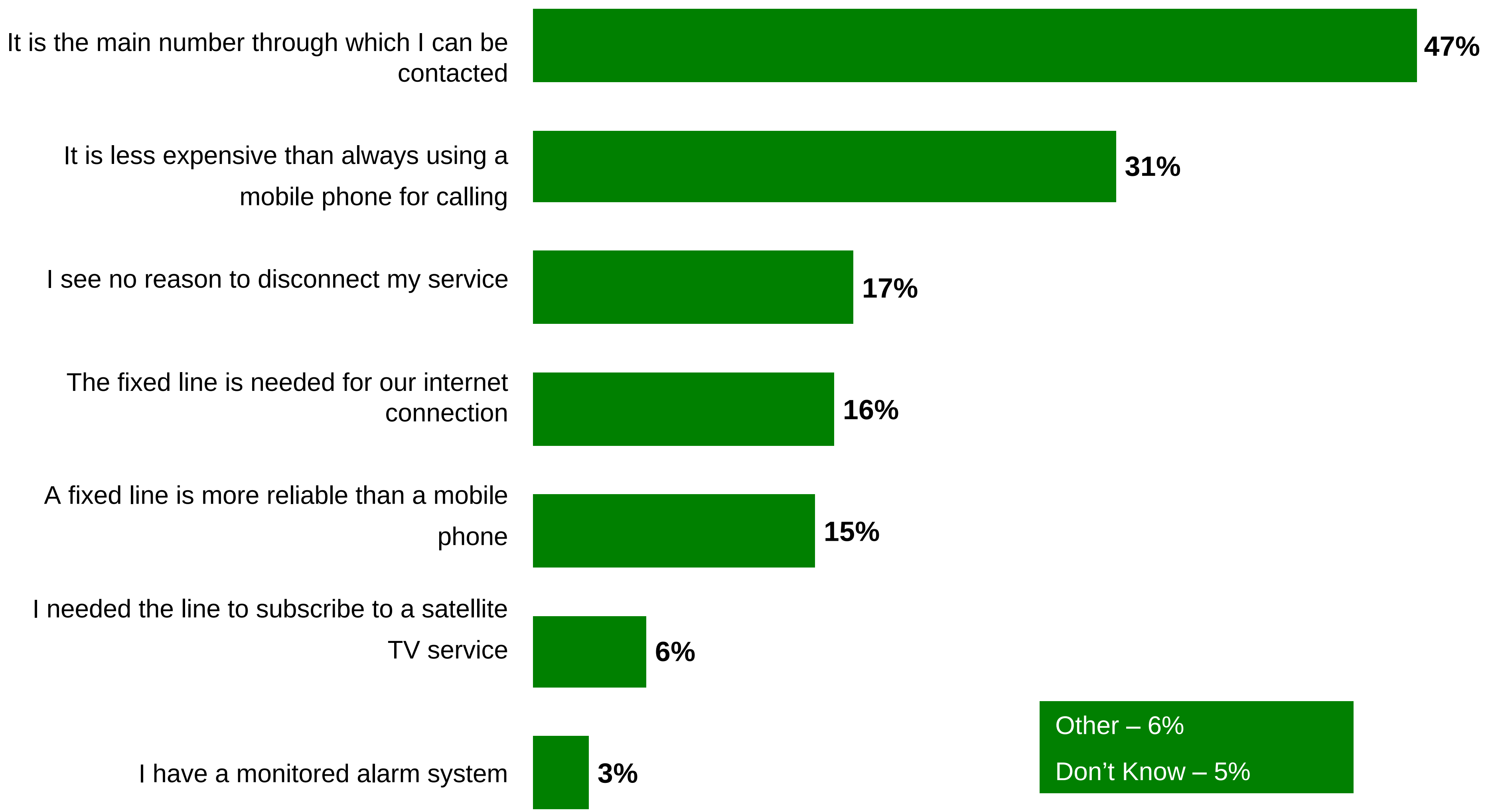


Percentage who said Yes:	
Gender	
Male	25%
Female	23%
Age	
15-24	21%
25-44	21%
45-64	36%
65-74	30%
Region	
Dublin	27%
ROL	20%
Munster	24%
Conn/Ulster	25%

Combining these results with current fixed line subscribers, 77% of total respondents either have a fixed line phone now or had one in the past.

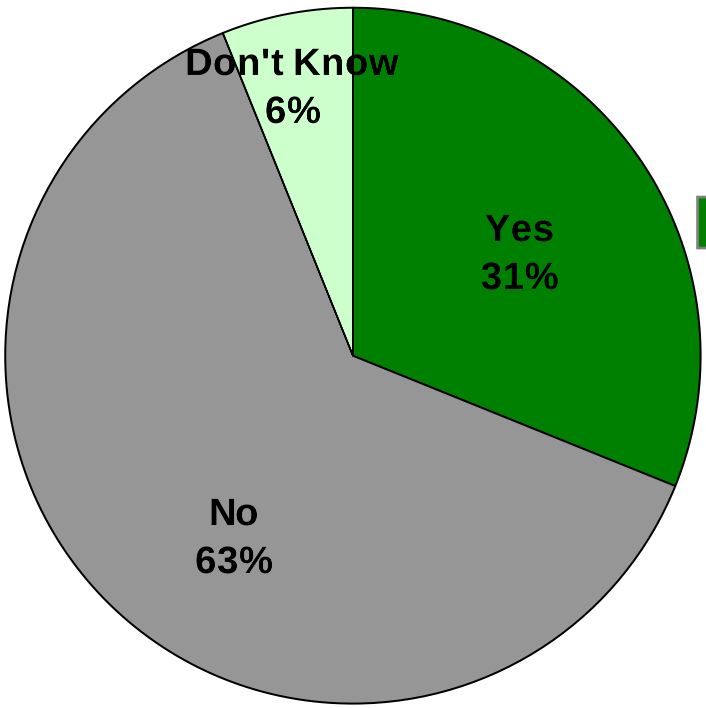
Q2 Have you ever had a fixed line connection at your current address?

Rationale for Keeping Fixed Line Home Connection
Base: Has a Residential Landline, N = 697



Q4 What are your main reasons for keeping a fixed line phone in your home?

Incidence of Ex-Directory Registered Phones
Base: Has a Residential Landline, N = 697

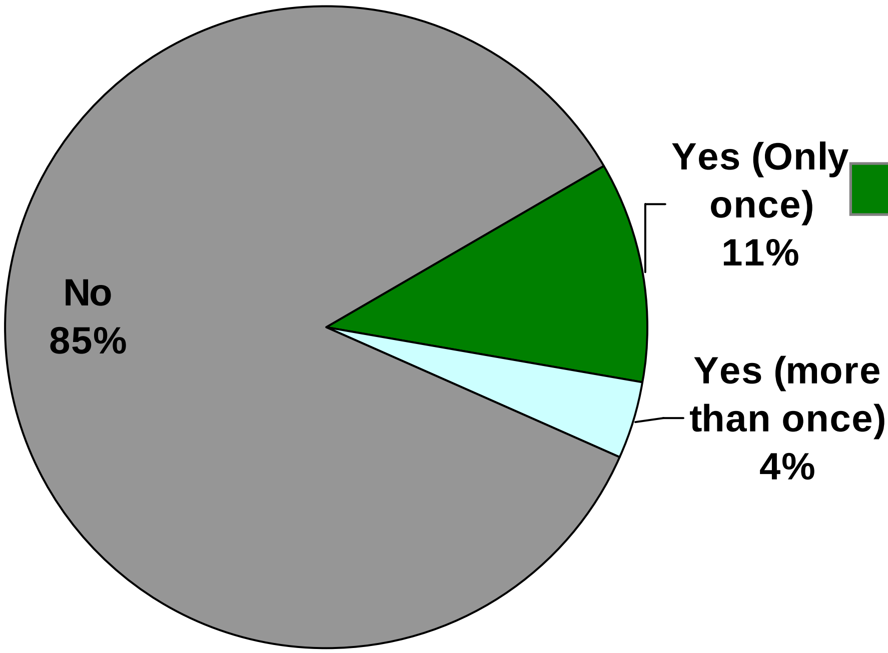


Percentage who said Yes:

Gender	
Male	27%
Female	35%
Age	
15-24	24%
25-44	29%
45-64	34%
65-74	37%
Region	
Dublin	30%
ROL	32%
Munster	31%
Conn/Ulster	31%

Q3 Is your fixed line phone currently registered as ex-directory?

Incidence of Fixed Line Switching
Base: Has a Residential Landline, N = 697



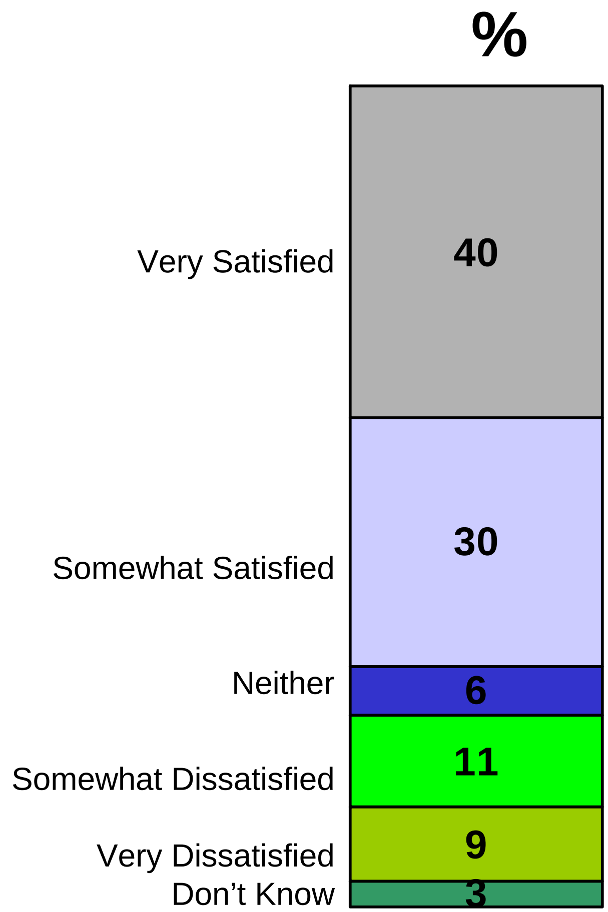
Percentage who have switched : (once & more than once)

Gender	
Male	11%
Female	19%
Age	
15-24	13%
25-44	17%
45-64	18%
65-74	3%
Region	
Dublin	12%
ROL	19%
Munster	14%
Conn/Ulster	18%

Overall 15% have switched fixed line provider in the last year

Q5 Have you switched your fixed line telephone provider in the last 12 months?

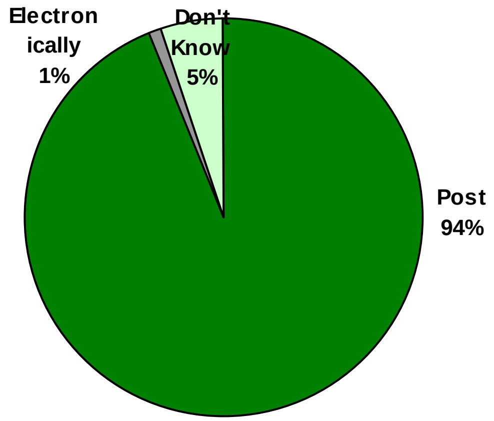
Satisfaction with Process of Switching
Base: Switched Landline Provider in last 12 months, N = 106



- Overall, 70% of switchers were satisfied with the process of switching
- Satisfaction was highest in Munster, and lowest in Ulster/ Connaught where 36% switchers expressed dissatisfaction with the switching process

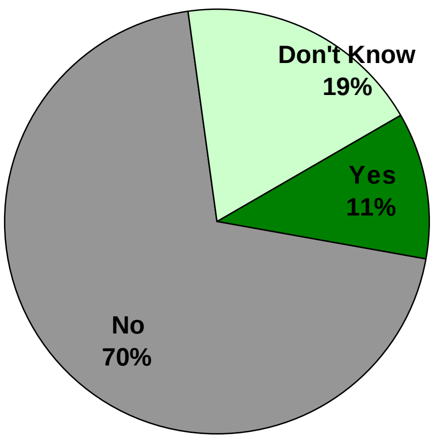
Q6 How satisfied were you with the process of switching operator?

Method of Receiving Fixed Line Bill



Those who receive their fixed line bill electronically tend to be females, those aged between 25-44 years of age and those from the Connaught/Ulster area.

Interest in Receiving Fixed Line Bill Electronically



Male respondents, Dublin respondents and those aged 25-44 show the greatest interest in receiving electronic bills

Q8 Do you receive your bill electronically or by conventional post? N=697

Q9 Would you be interested in receiving your bill electronically? N= 653

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Residential Service Providers
Base: Has a Residential Landline, N = 697

	Q2 2005	Q3 2005	Q4 2005	Q1 2006	Q2 2006
Eircom	82%	76%	81%	82%	86%
Smart Telecom	6%	6%	5%	6%	4%
BT Ireland	2%	3%	4%	3%	2%
Other Service Providers	6%	10%	8%	4%	7%
Don't Know	4%	7%	4%	4%	2%

Q11 Which if any of the following companies do you use for your residential phone service?

Average Bi-monthly Bill
Base: Has a Residential Phone Bill, N = 697

Average Bill **€101.39 (€50.70 per month)**

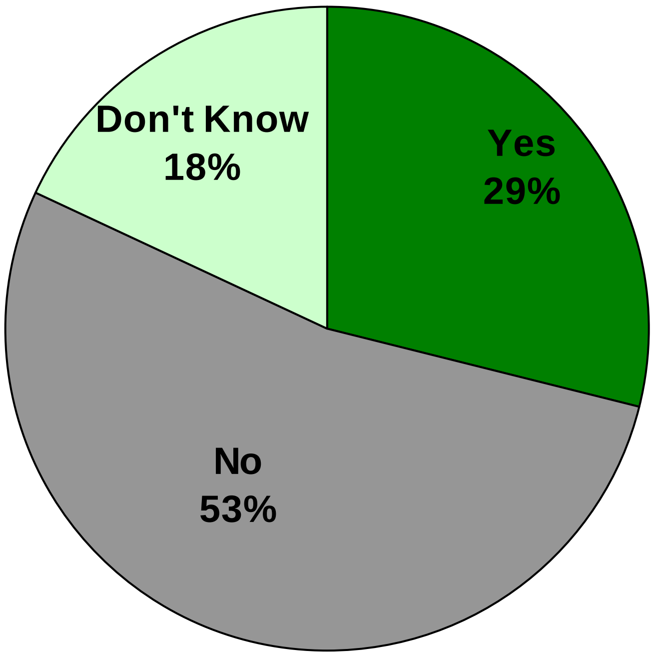
(excluding Don't Know/Refused/Not stated)

There is a relationship between age and average fixed line spend:
- 15-24 - €126.55
- 25-44 - €115.23
- 45-64 - €98.64
- 65-74 - €57.43

Groups with high spend include:
- Those running a business from home - €122.65
- Those with home internet access - €116.64
- Single respondents - €112.75
- Mortgage holders - €112.21
- Those working part time - €110.83
- Those with mobile phones - €109.44

Q12 How much approximately was your last bi-monthly phone bill from your telephone service including VAT?

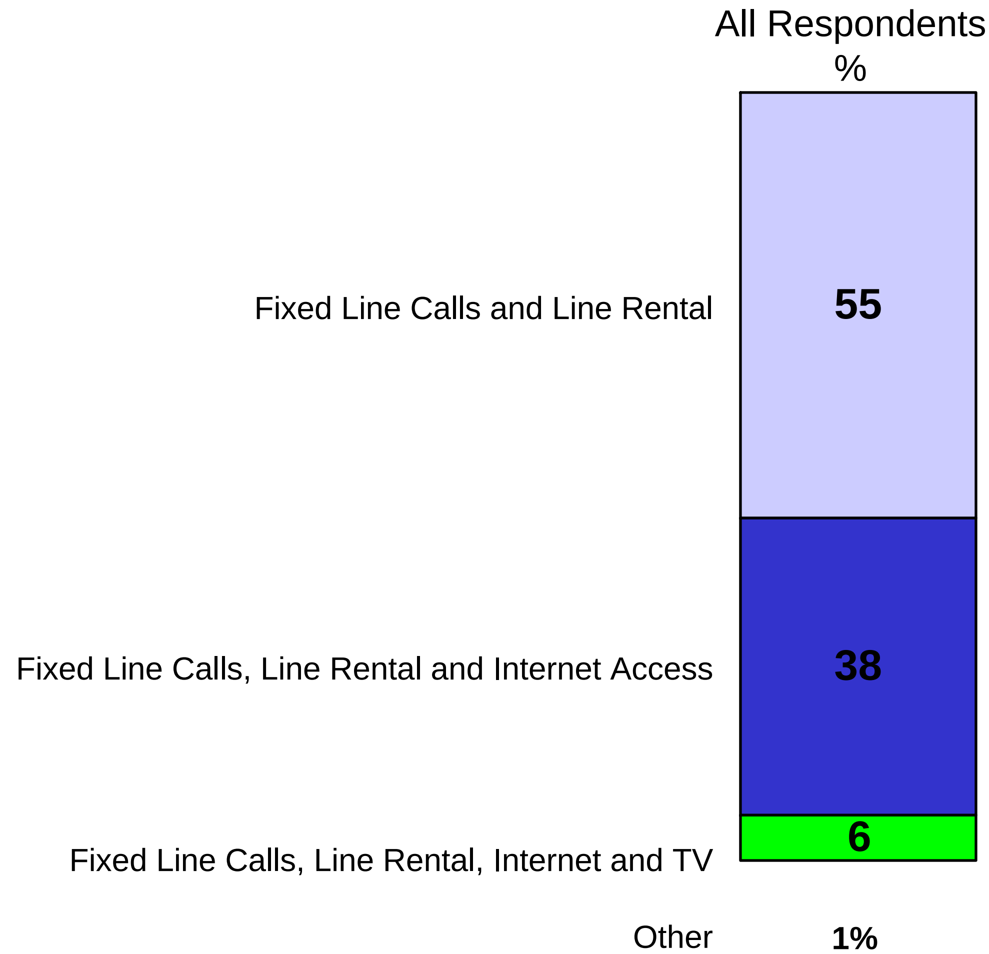
Subscription to Bundled Services
Base: Has a Residential Landline, N = 697



Percentage who said Yes:	
Gender	
Male	26%
Female	31%
Age	
15-24	22%
25-44	33%
45-64	30%
65-74	18%
Region	
Dublin	19%
ROL	36%
Munster	27%
Conn/Ulster	37%

Q13 Do you subscribe to a bundled service from your provider?

Elements Bundled By Provider
Base: Landline With Bundled Package, N=197



Q14 What elements of your phone package are bundled by your provider?

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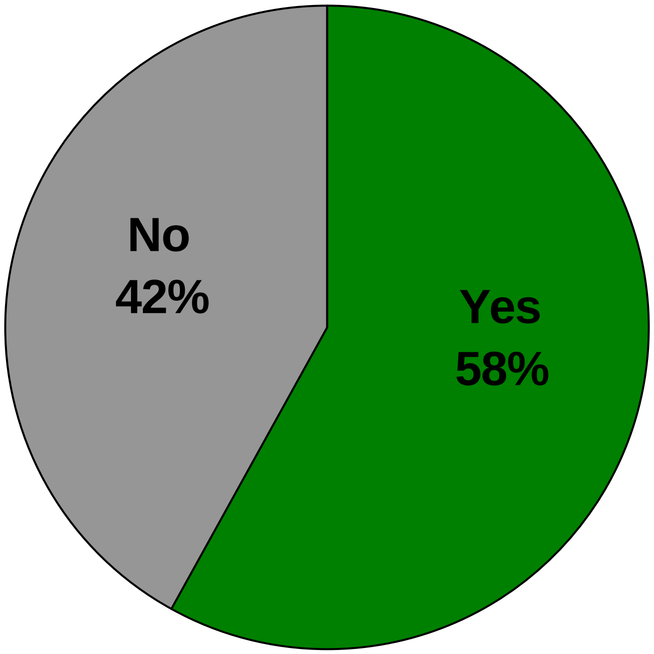
Awareness of Multiple Directory Enquiries Service Providers
Base: All Respondents N = 1,017

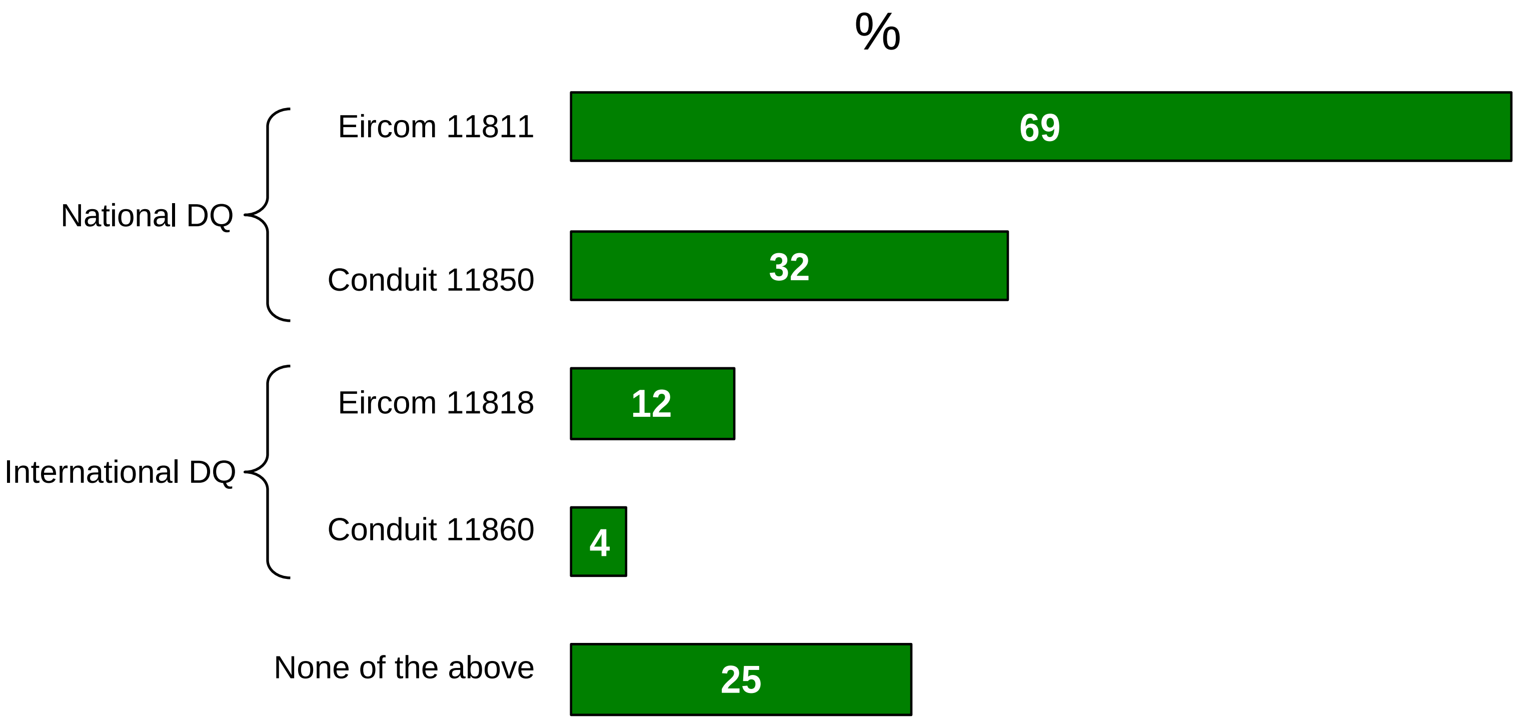


Percentage who said Yes:

Gender	
Male	56%
Female	60%
Age	
15-24	50%
25-44	65%
45-64	62%
65-74	31%
Region	
Dublin	63%
ROL	66%
Munster	52%
Conn/Ulster	48%

Q15 Are you aware that there is more than one service provider of directory enquiries in Ireland?

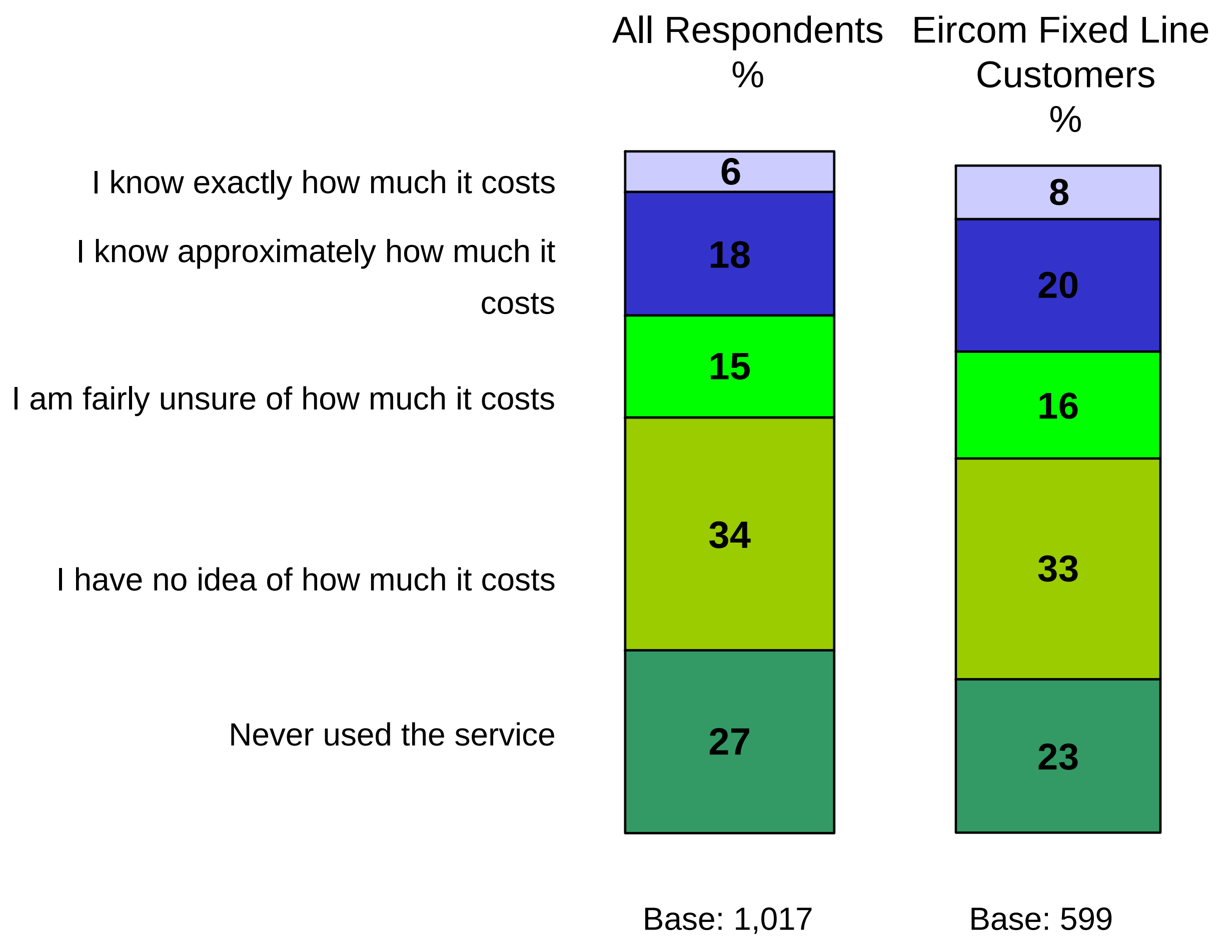
Level of Use of Directory Enquiries Services
Base: All Respondents N = 1,017



Q16 Have you ever used any of the following directory enquiries services?

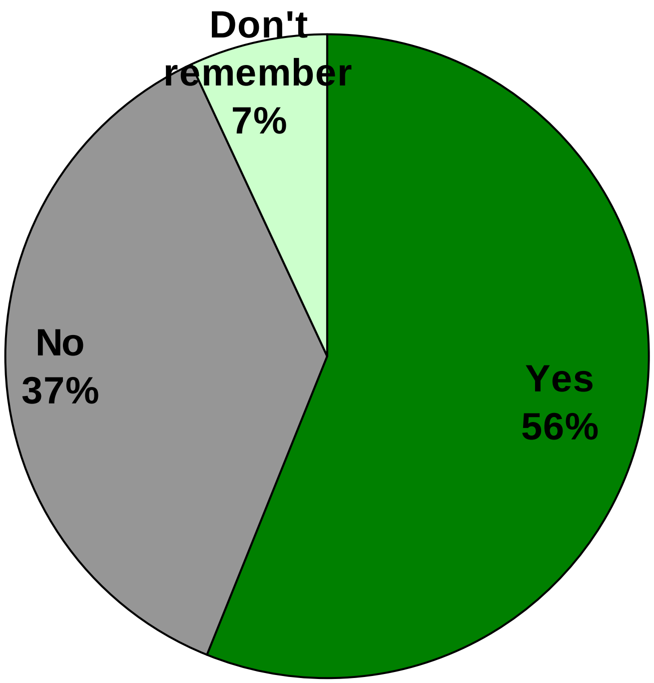
Note: Research Conducted pre 11890 launch

Awareness of Cost involved in calling Directory Enquiry Service
Base: All Respondents N=1017



Q17 How much do you know about the cost involved in making a call to a directory enquiries service?

Use of Call Completion Service
Base: Has ever used Directory Enquiries Call Completion Service N = 746



Percentage who said Yes:	
Gender	
Male	58%
Female	54%
Age	
15-24	60%
25-44	59%
45-64	54%
65-74	35%
Region	
Dublin	48%
ROL	57%
Munster	57%
Conn/Ulster	66%

Q18 Have you ever used the call completion service when making a call to directory enquiries?

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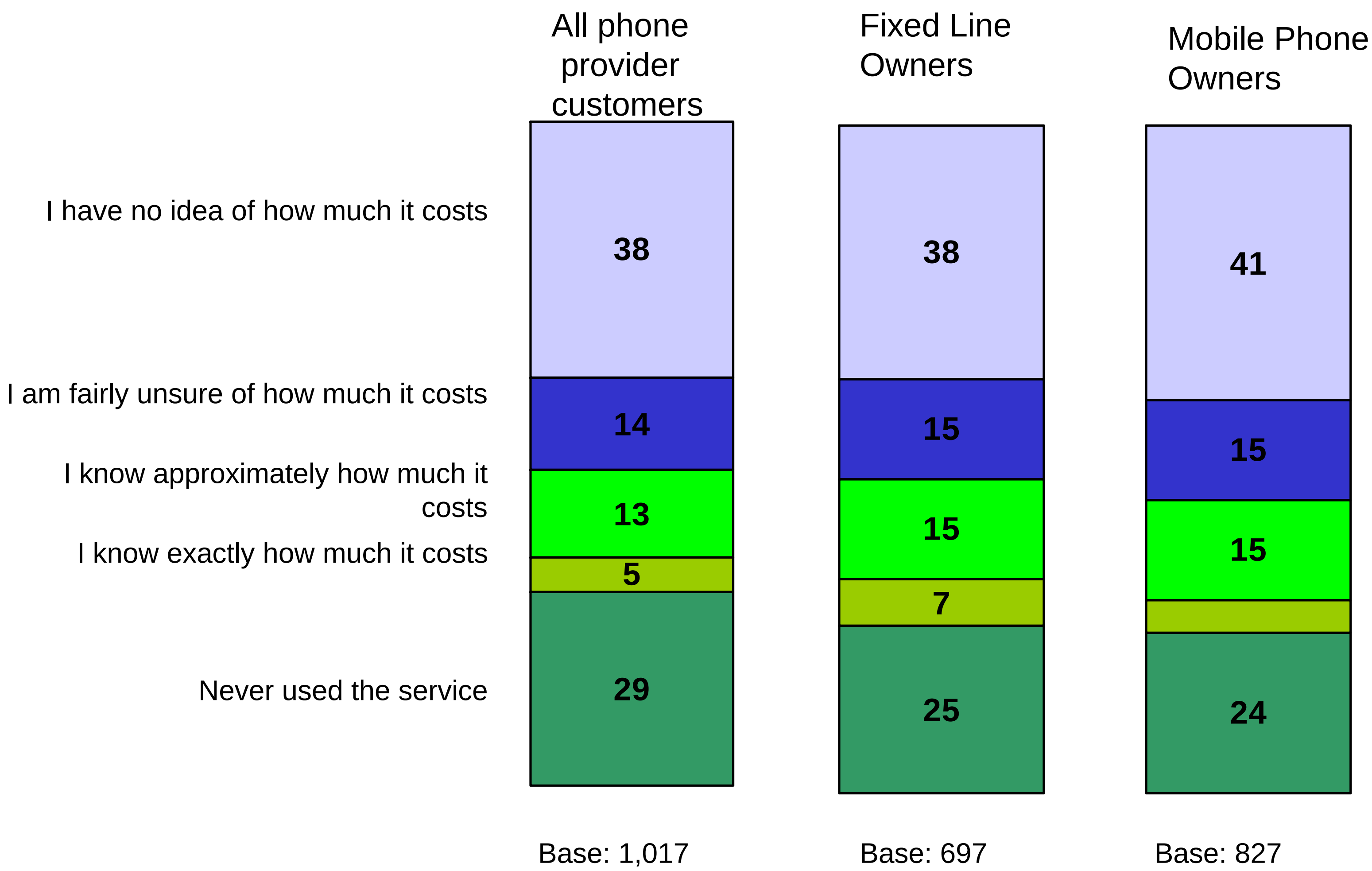
Awareness of Additional Cost for Call Completion
Base: All Respondents



Q19 Are you aware of the additional cost involved in requesting to be connected straight through to the number you have requested?

Mobile Phone Usage

Key Findings

- Mobile penetration has dropped marginally by 4% to 80% (a 1% decline outside the margin of error) compared to quarter 1, suggesting that market penetration is reaching saturation point.

- In line with previous waves, over three quarters of respondents use the pay as you go service. There is a higher concentration of pre-paid phones among those those aged 15-24 and 65 +.

- Vodafone and O2 continue to retain a large share of the consumer mobile market with 53% and 33% respectively.

- 8 in 10 are aware that they can switch mobile operator and retain the same mobile number. Those least likely to be aware of mobile number portability are aged 45+.

Key Findings

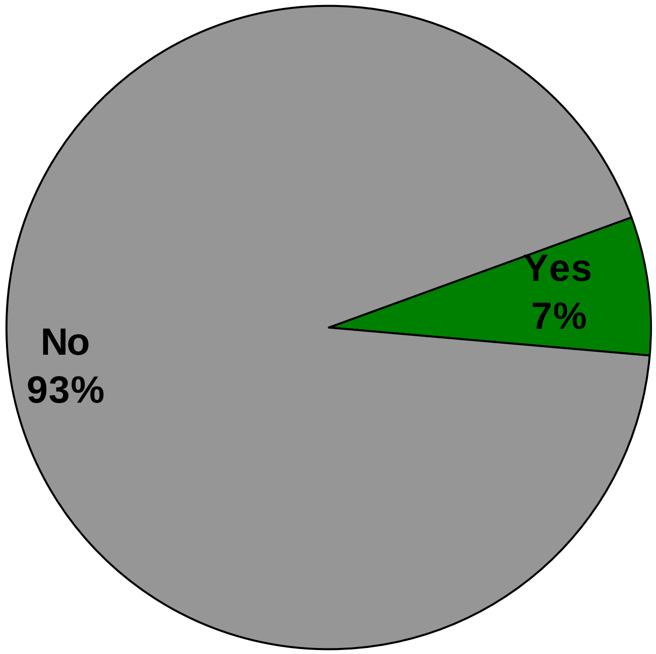
- The average amount of time spent using a mobile is 4 hours 47 minutes per month. Bill-paying mobile customers are likely to spend more time on their mobiles than pre-paid customers, probably due to the availability of 'packages' to bill-payers, allowing them a certain amount of minutes as part of their service.

- Average spend on mobile phones is now at €57.62, up slightly since measured in Q4 2005.

- Almost 7 in 10 roaming customers have little or no idea of how much it costs to use their phone while abroad.

- 6% of mobile consumers currently subscribe to a 3G mobile service. These respondents are most likely to be aged 15-24 years of age. Those most likely to have availed of this service are younger consumers.

Multiple Phone Subscriptions
Base: Has a Mobile Phone N = 827



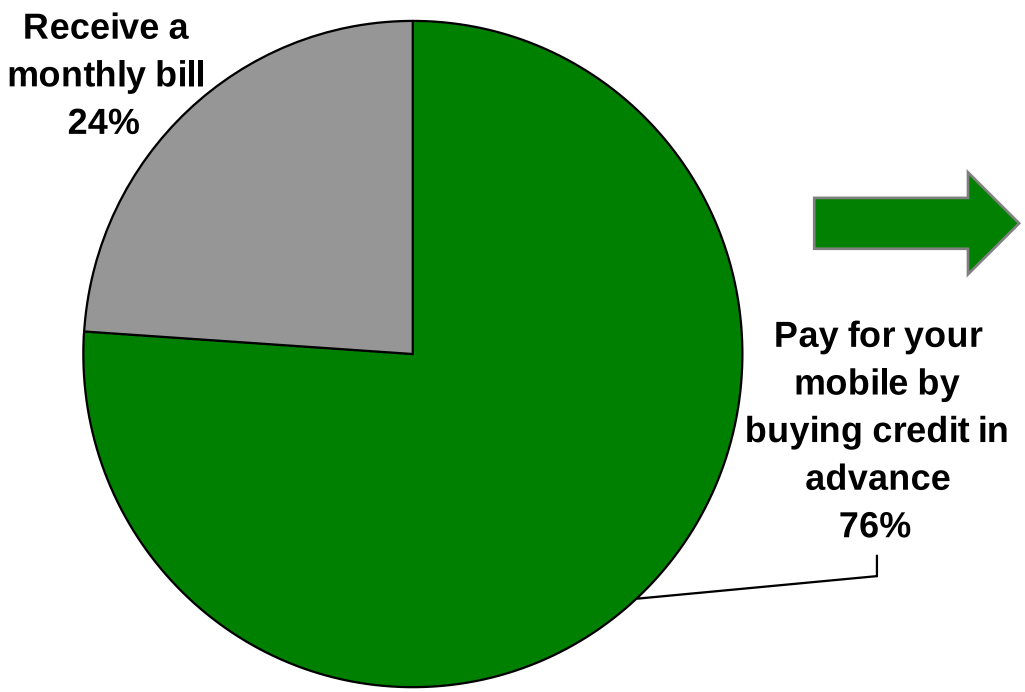
Percentage who said Yes:

Gender	
Male	**9%**
Female	**5%**
Age	
15-24	**6%**
25-44	**9%**
45-64	**6%**
65-74	**-**
Region	
Dublin	**4%**
ROL	**16%**
Munster	**3%**
Conn/Ulster	**5%**

• Billed mobile users who have more than one phone subscription tend to be men, those aged between 45-64 years of age and those from the Connaught/Ulster region.

Q21 Do you use more than one mobile phone subscription or account?

Payment for Mobile Phone Service
Base: Has a Mobile Phone N = 827

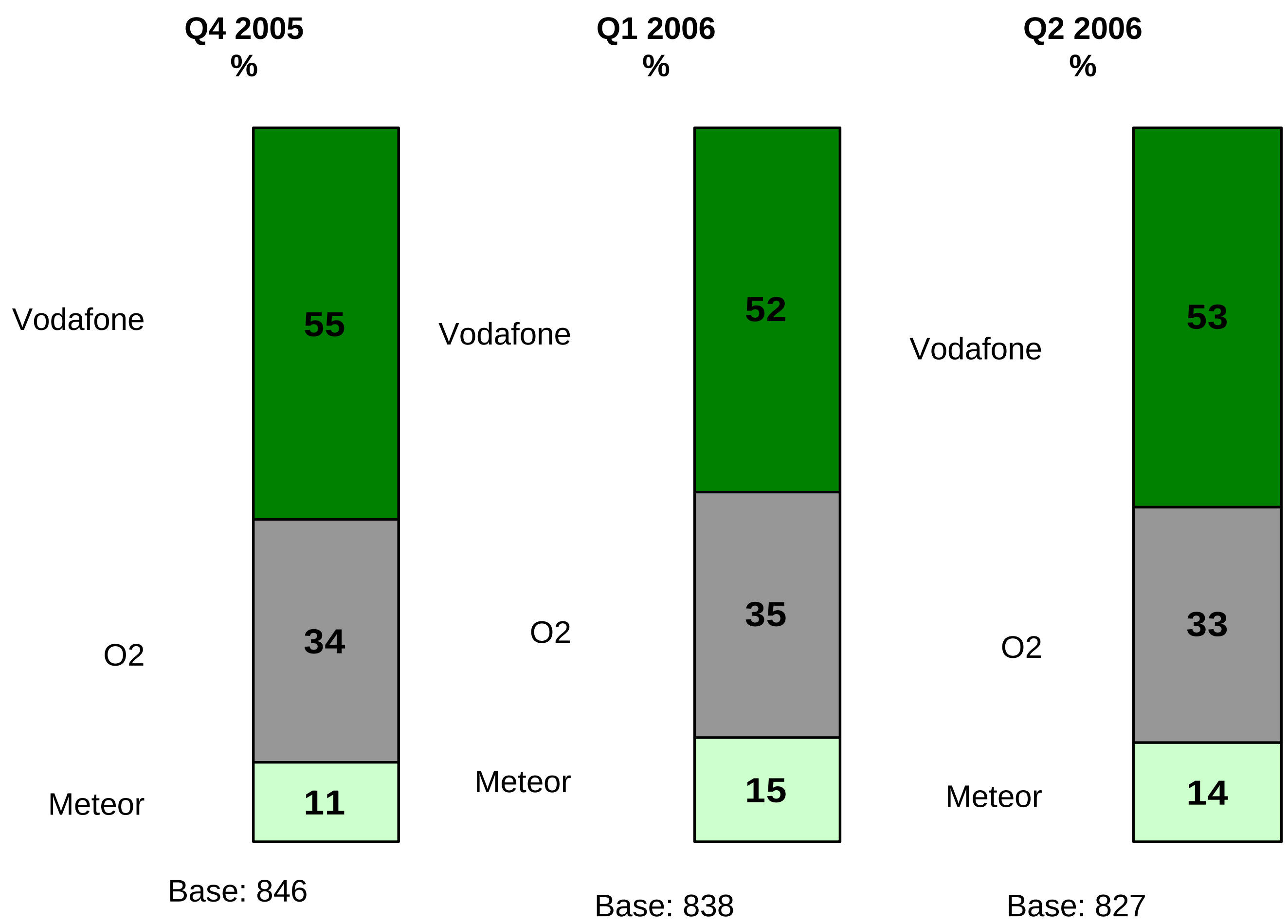


Profile of those who buy credit:

Gender	
Male	71%
Female	81%
Age	
15-24	92%
25-44	71%
45-64	69%
65-74	85%
Region	
Dublin	72%
ROL	80%
Munster	79%
Conn/Ulster	72%

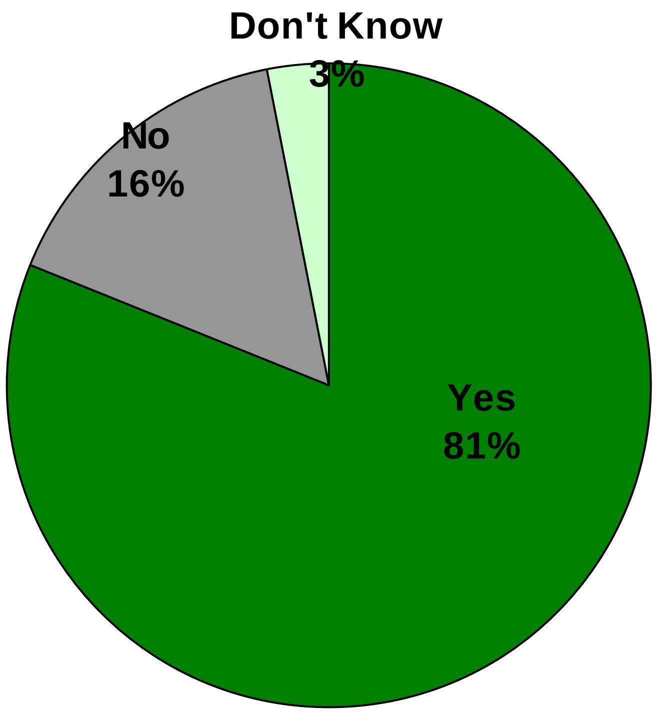
Q23 Is your current mobile phone service one where you?

Mobile Suppliers
Base: Has a Mobile Phone



Q24 Who is your mobile supplier?

Awareness of Mobile Number Portability
Base: Has a Mobile Phone N = 827

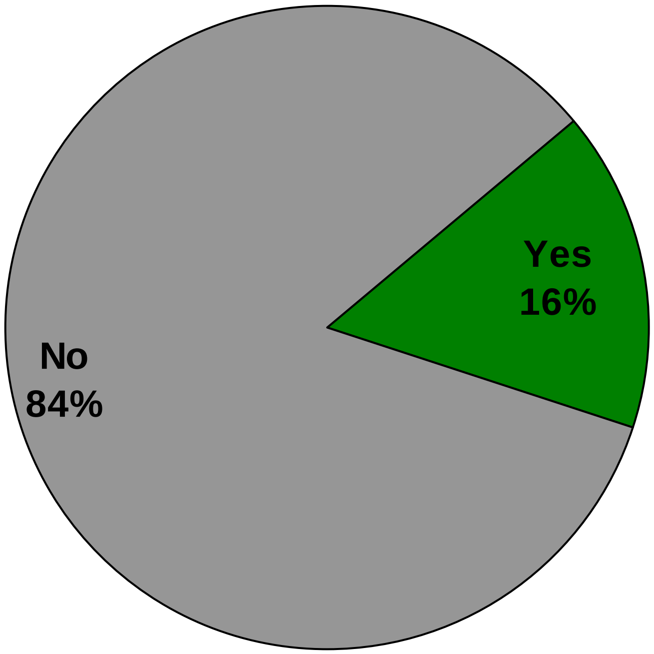


Percentage who said no:

Gender	
Male	13%
Female	18%
Age	
15-24	11%
25-44	13%
45-64	22%
65-74	31%
Region	
Dublin	30%
ROL	11%
Munster	10%
Conn/Ulster	9%

Q25 Are you aware that you can switch mobile operator and keep your old mobile number?

Level of Switching and Retention of Old Mobile Number
Base: Aware of Number Portability N = 672

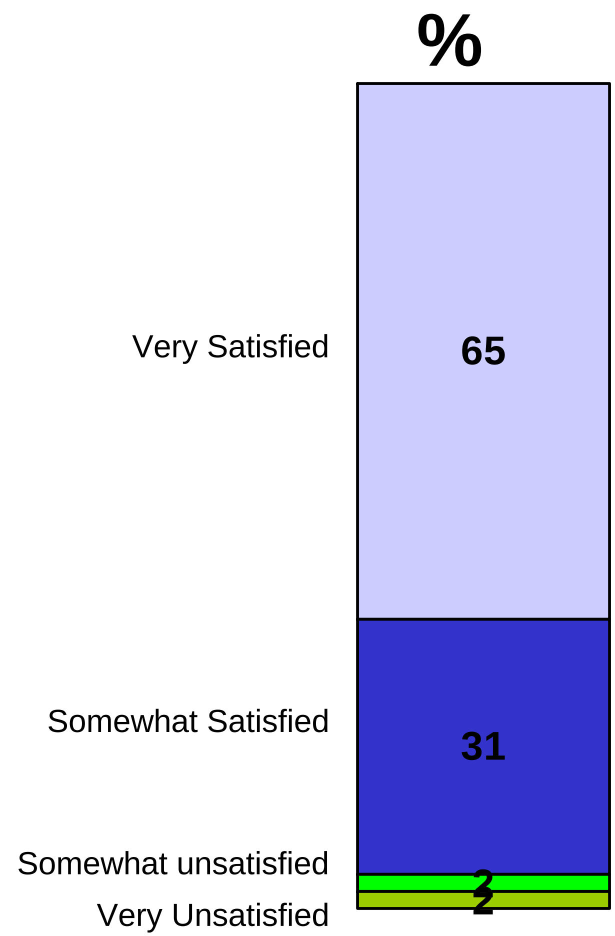


Percentage who said yes:

Gender	
Male	16%
Female	15%
Age	
15-24	27%
25-44	14%
45-64	8%
65-74	-
Region	
Dublin	19%
ROL	17%
Munster	13%
Conn/Ulster	14%

Q26 Have you switched your mobile phone provider in the last twelve months and kept your old mobile phone number?

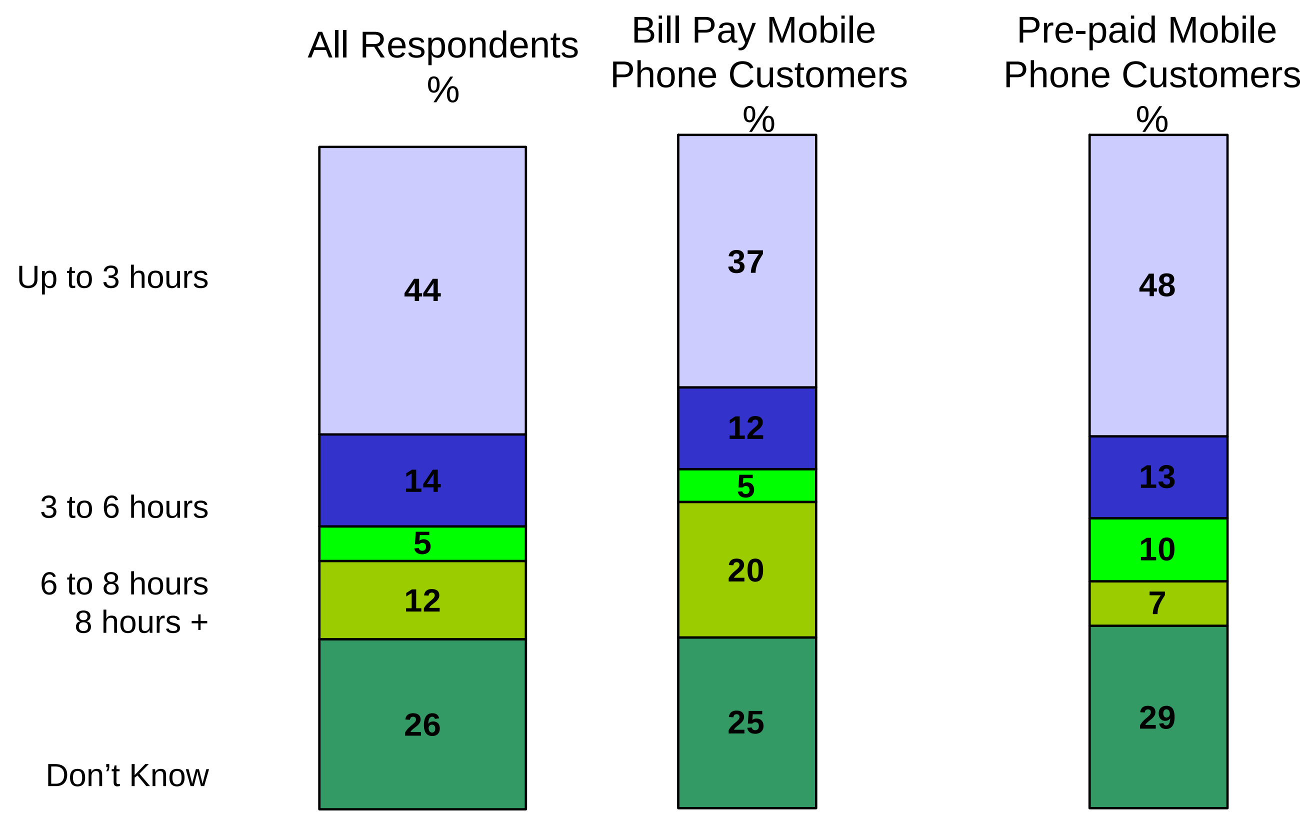
Level of Satisfaction with Mobile Switching Process
Base: Have Changed Providers N=104



Almost all respondents are satisfied with the process of switching mobile provider.

Q27 How satisfied were you with the process of switching mobile operator?

Average Time Per Month Using Mobile Phone
Base: Has a Mobile Phone, N=827



Note: The survey is based on what people <u>estimate</u> their monthly mobile phone usage to be and is not directly comparable to Minutes of Use (MoU) data as reported by particular mobile network operators.

	All Respondents	Bill Pay Mobile Phone Customers	Pre-paid Mobile Phone Customers
Average Time	**287 Minutes** **4 Hours 47 minutes**	**376 Minutes** **6 Hours 16 minutes**	**217 Minutes** **3 Hours 37 minutes**
	Base: 827	Base: 141	Base: 401

Q28 Average time per month using mobile phone

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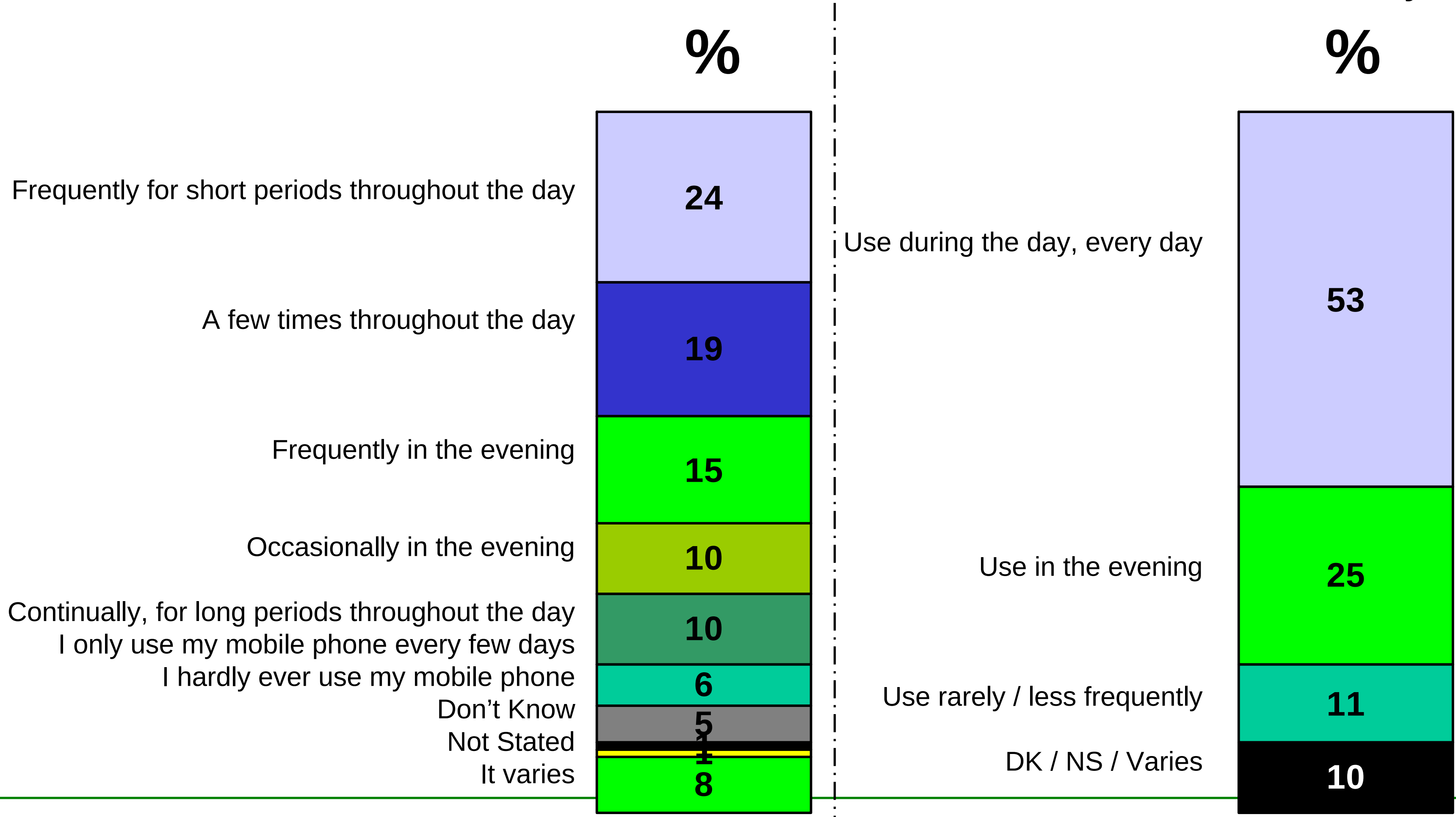
Level of Use of Mobile Phone
Base: Has a Mobile Phone N = 827



Q29 Which of the following phrases best describes how you generally use your mobile phone?

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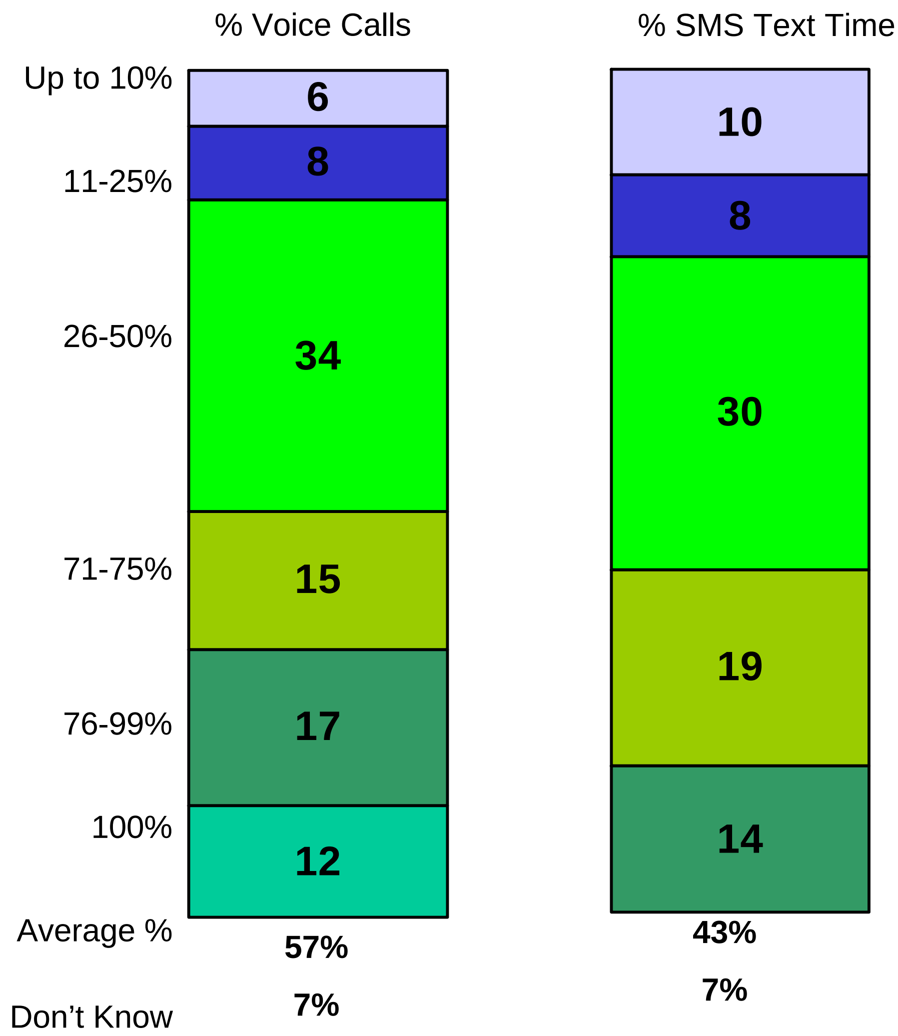
Level of Talk Time & SMS Phone Usage
Base: Has a Mobile Phone N = 827

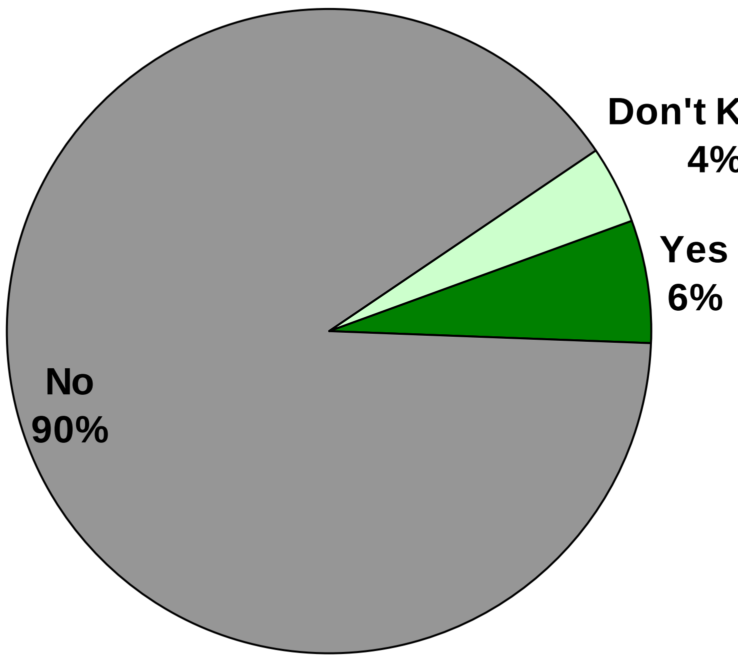


• 65-74 year olds are more likely to talk than text on their mobiles as are 45-64 year olds.

Research Note: due to aggregation of individual respondents’ usage patterns and rounding of average, the average proportion of mobile usage between each age group may not total 100%.

Q30a What percentage of mobile phone usage is on talk time?

Subscription to 3G Service
Base: Has a Mobile Phone N = 827

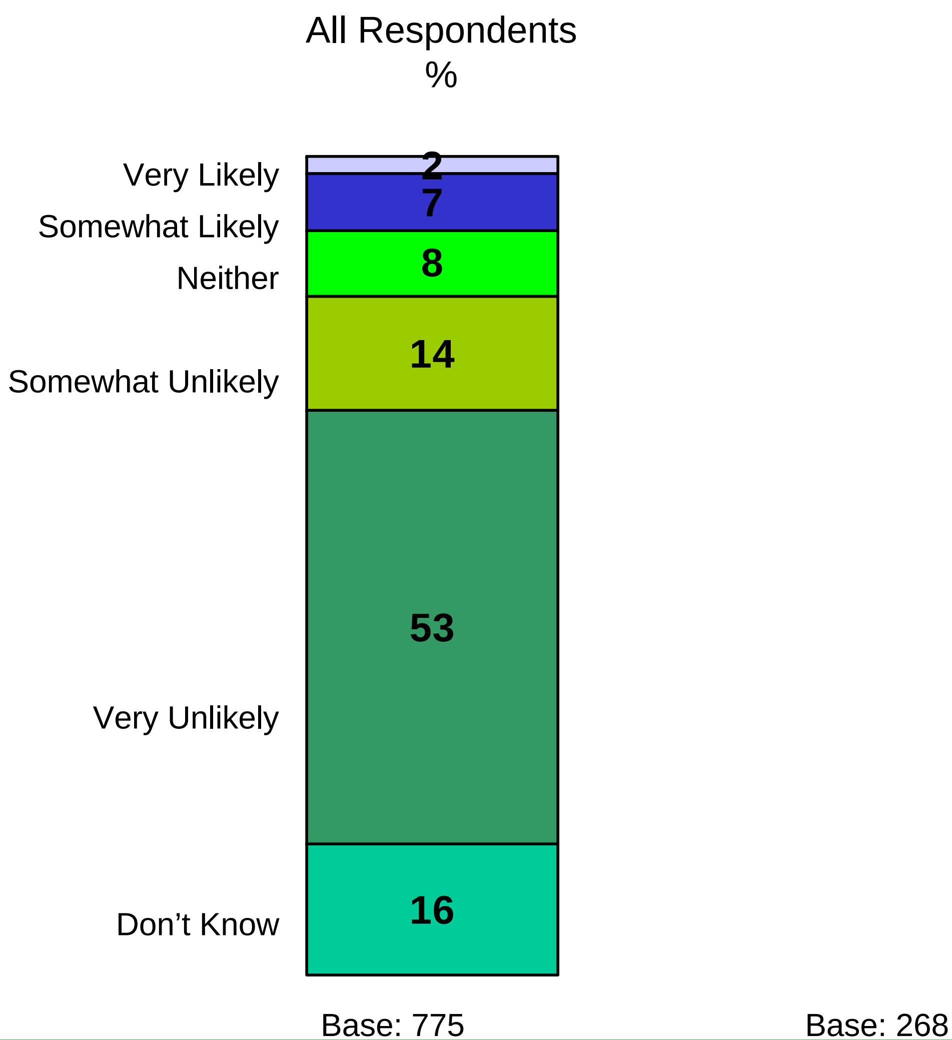


Percentage who said yes:

<u>Gender</u>	
Male	**5%**
Female	**6%**
<u>Age</u>	
15-24	**12%**
25-44	**5%**
45-64	**3%**
65-74	**-**
<u>Region</u>	
Dublin	**8%**
ROL	**10%**
Munster	**2%**
Conn/Ulster	**7%**

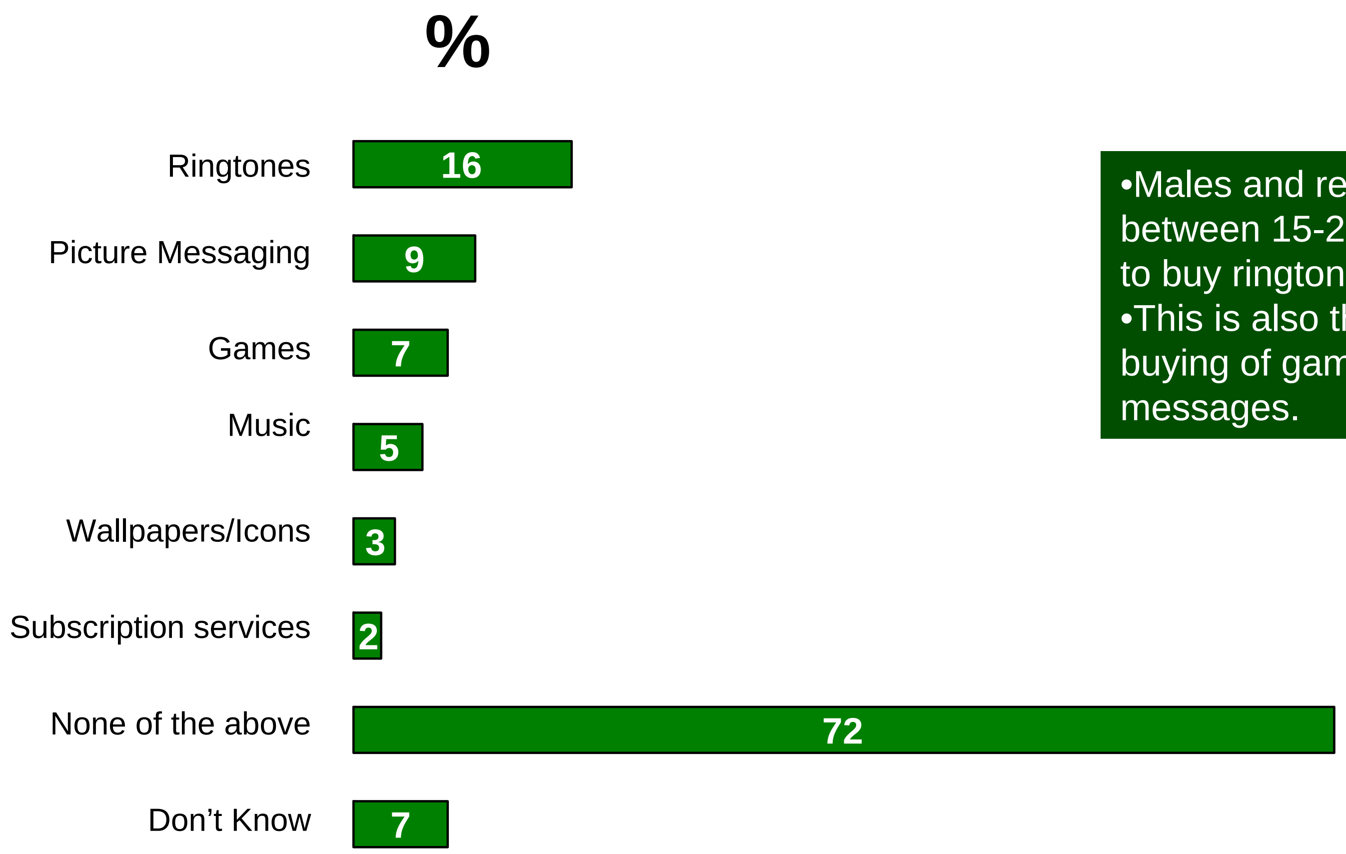
Q31 Do you currently subscribe to a 3G mobile phone service?

Likelihood to Subscribe to 3G in Next 3 Months
Base: Has a Mobile Phone, does not have a 3G Subscription



Q32 How likely are you to get a 3G mobile phone in the next 3 months?

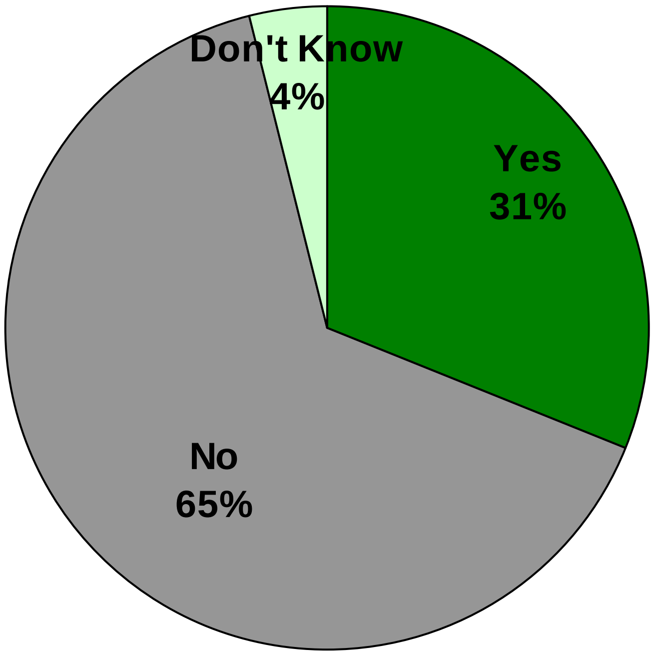
Mobile Phone Services Bought in Last 3 Months
Base: Has a Mobile Phone N = 827



- Males and respondents aged between 15-24 are more likely to buy ringtones
- This is also the case for the buying of games and picture messages.

Q33 Have you purchased any of the following mobile phone services in the last 3 months?

Use of Picture Messages
Base: Has a Mobile Phone N = 827



Percentage who said yes:	
Gender	
Male	32%
Female	29%
Age	
15-24	53%
25-44	33%
45-64	10%
65-74	-
Region	
Dublin	31%
ROL	36%
Munster	26%
Conn/Ulster	30%

Q34 Have you used your mobile phone to send picture messages in the last 3 months?

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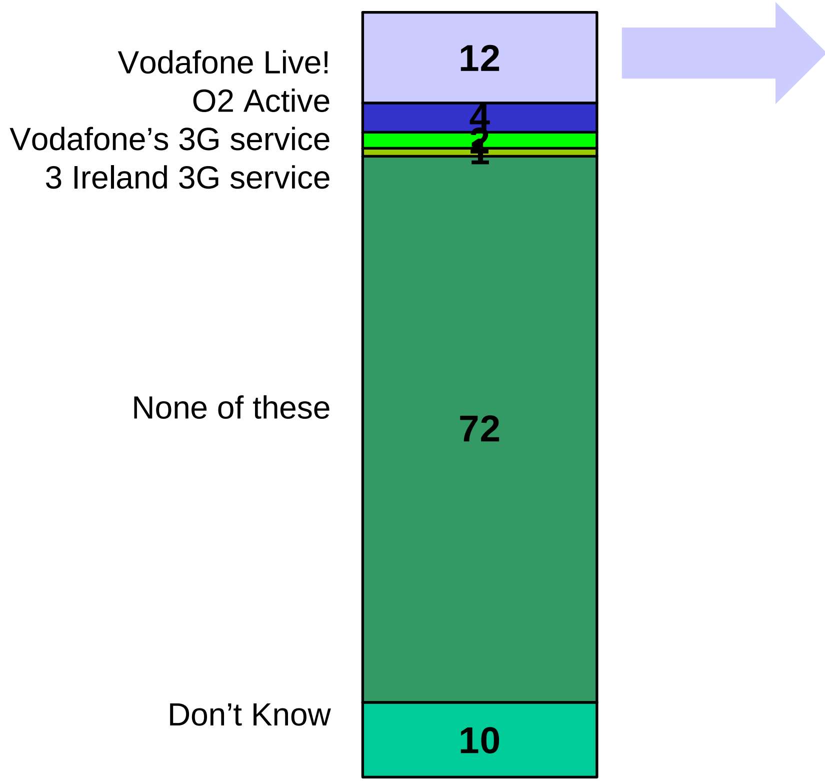
Use of Mobile Phone Services
Base: Has a Mobile Phone N = 827

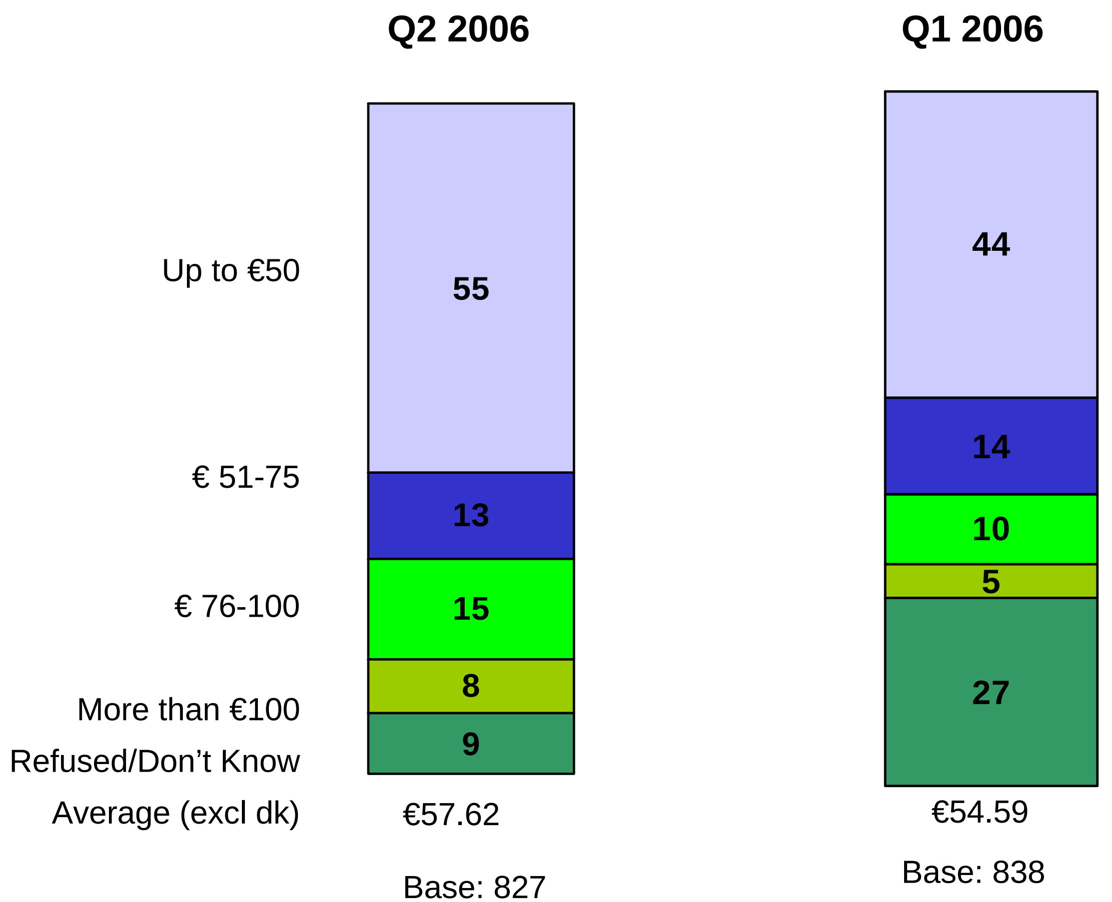


Percentage who used Vodafone Live!:

Gender	
Male	13%
Female	10%
Age	
15-24	21%
25-44	12%
45-64	3%
65-74	-
Region	
Dublin	10%
ROL	11%
Munster	14%
Conn/Ulster	10%

Q35 Have you used any of the following services?

Average Spend on Mobile
Base: Has a Mobile Phone, N=827



Note: The survey is based on what people estimate their monthly mobile bill was in the previous month and is not directly comparable with monthly ARPU as reported by mobile operators.

Q36 How much did you spend last month on your mobile?

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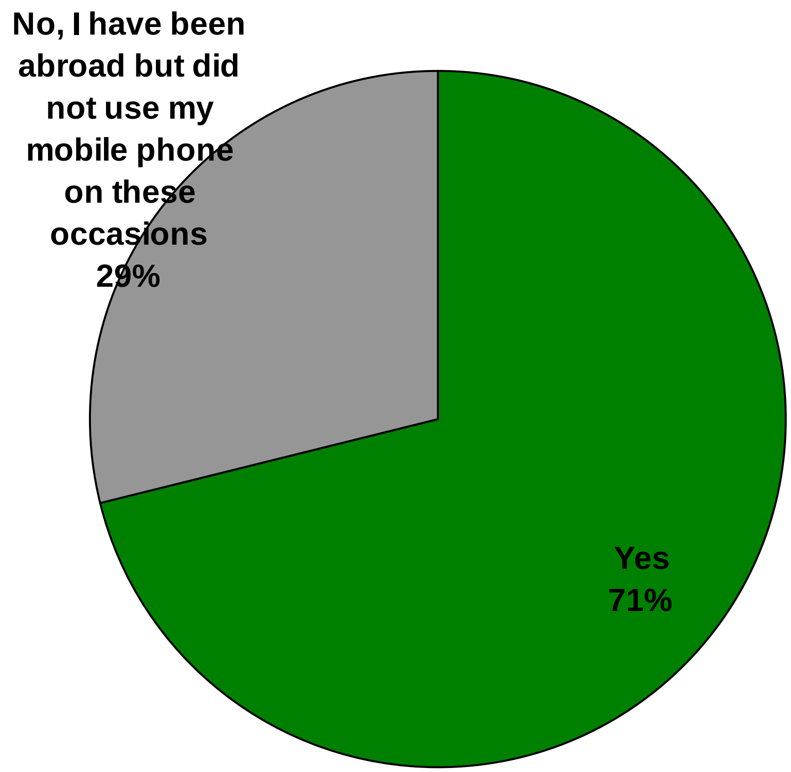
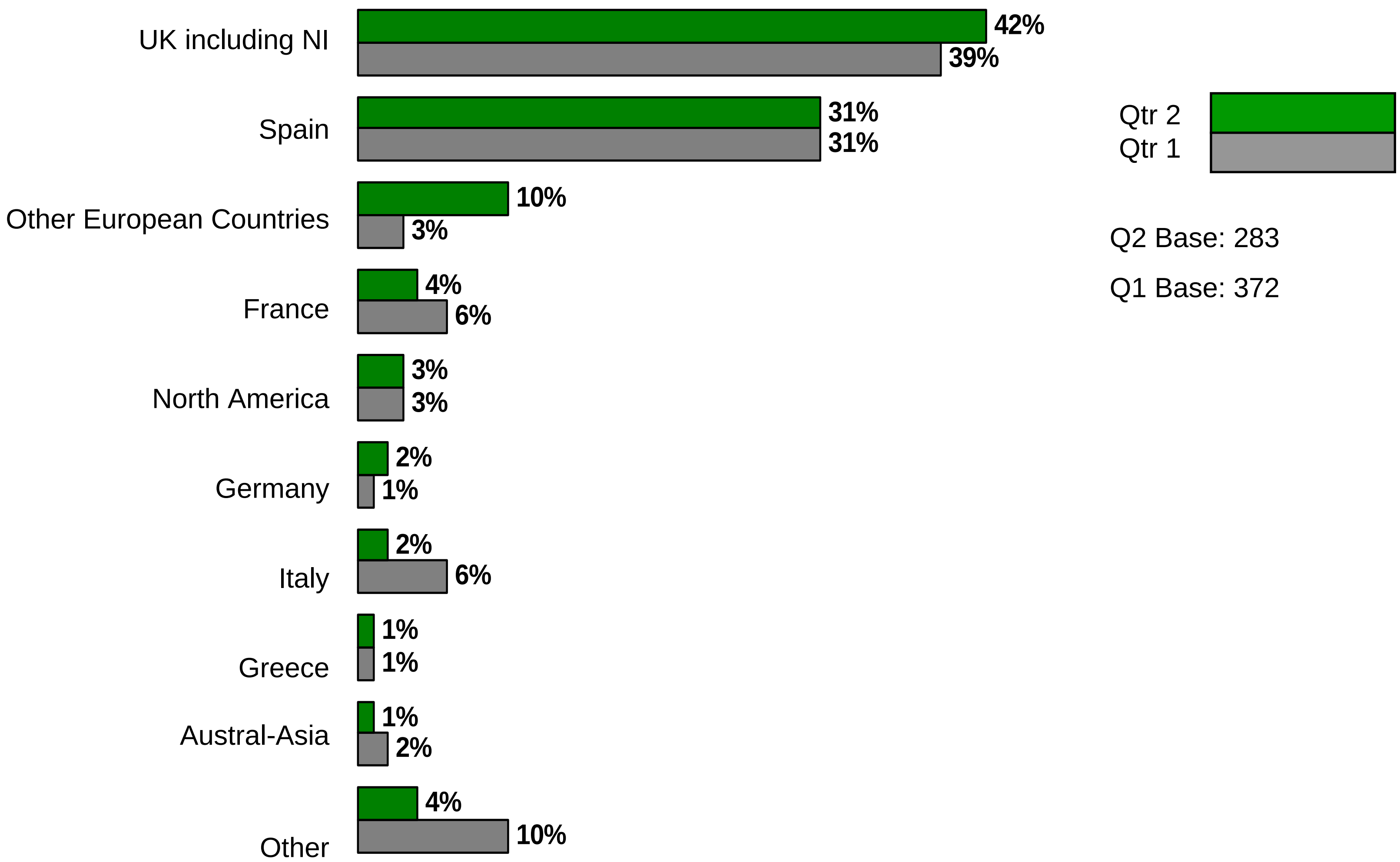
Use of Mobile Abroad
Base: Has Been Abroad in Last 12 Months N = 407



On average respondents have been abroad approximately 2.64 occasions in the last 12 months. NB: Average excludes those who have not been abroad in last 12 months

Q41 Have you used your mobile phone while abroad in the last year?

Countries in Which Phones Used Most in Last 12 Months
Base: Has Been Abroad in Past 12 Months & Used Phone Abroad N=283

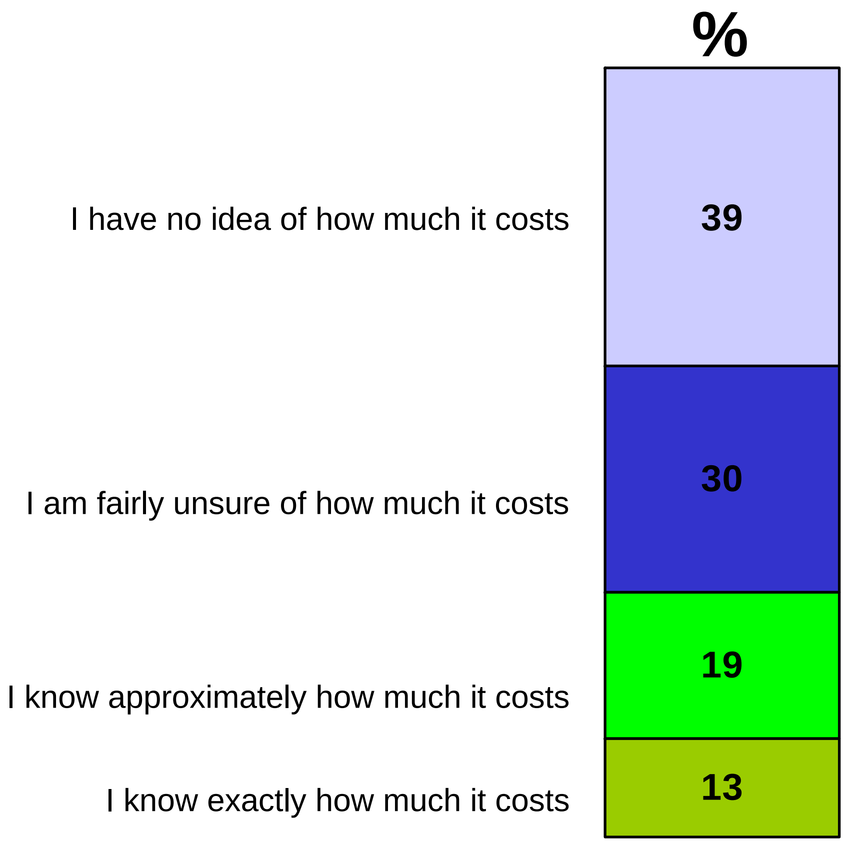


Q2 Base: 283

Q1 Base: 372

Q39 In which of these countries did you use your phone most during the last 12 months?

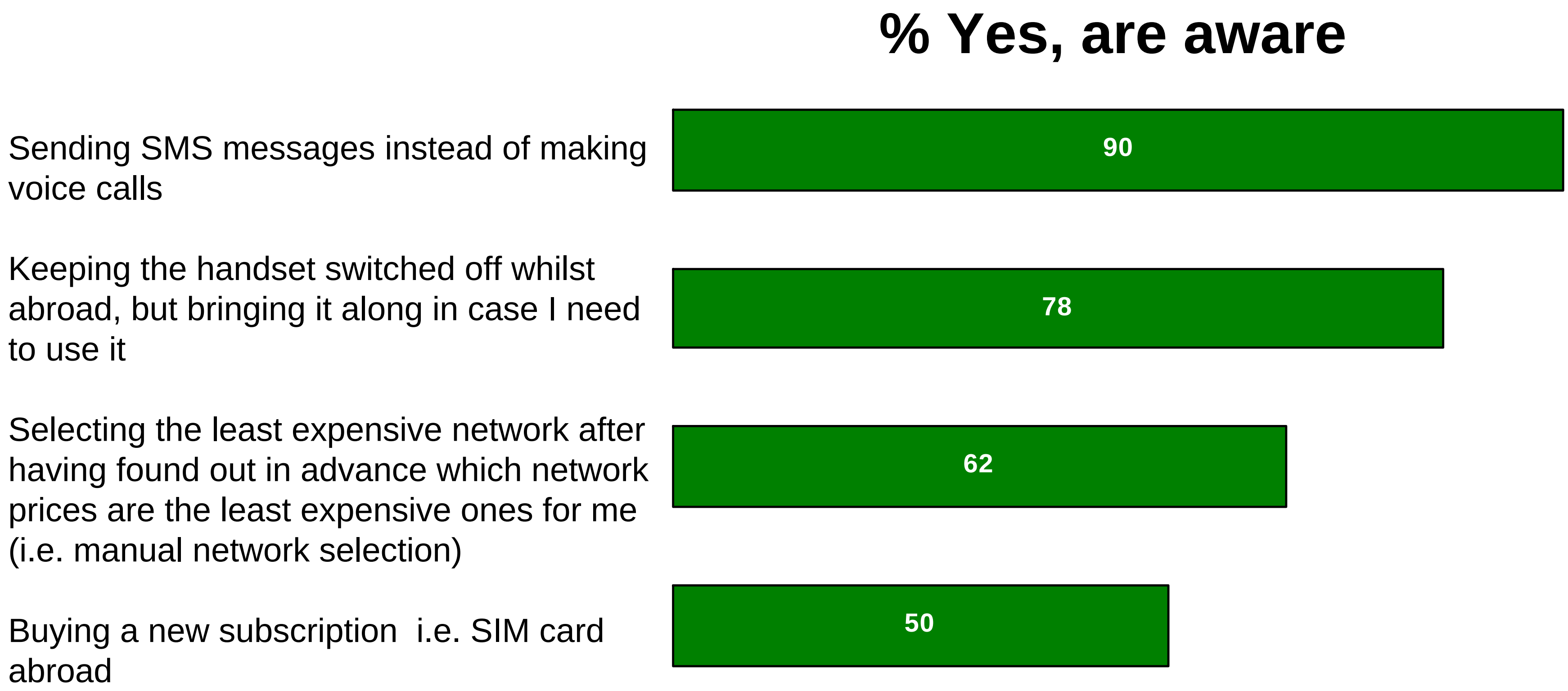
Awareness of Mobile Cost Abroad
Base: Has Been Abroad in Past 12 Months & Used Phone Abroad N =283



Q43 How aware are you of the cost of using your mobile phone while abroad?

Awareness of Mobile Cost Reduction Methods

Base: Has Been Abroad in Past 12 Months & Used Phone Abroad N =283



Q44 Are you aware of the following methods to reduce mobile phone costs abroad?

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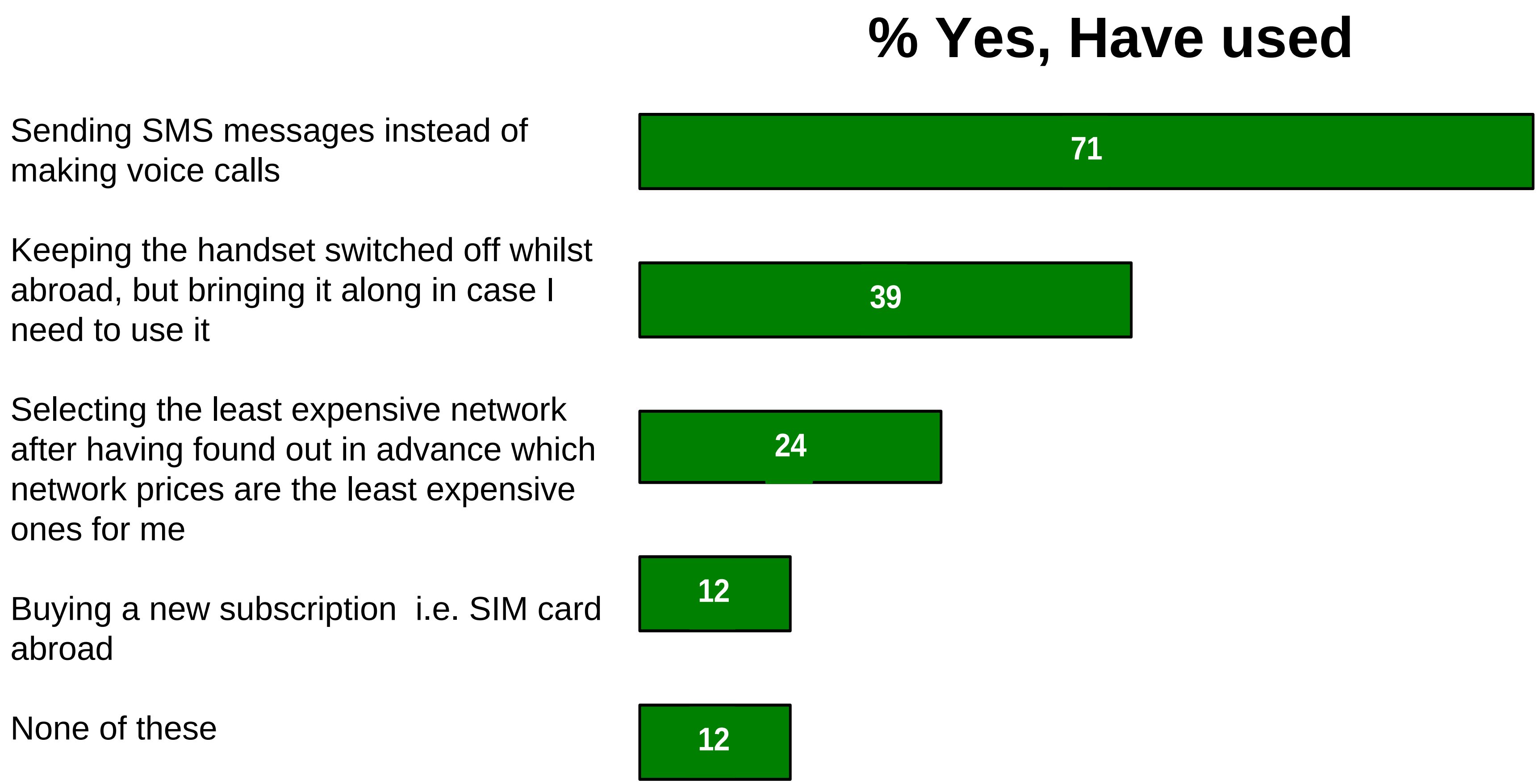
Use of Mobile Cost Reduction Methods

Base: Has Been Abroad in Past 12 Months & Used Phone Abroad N =283



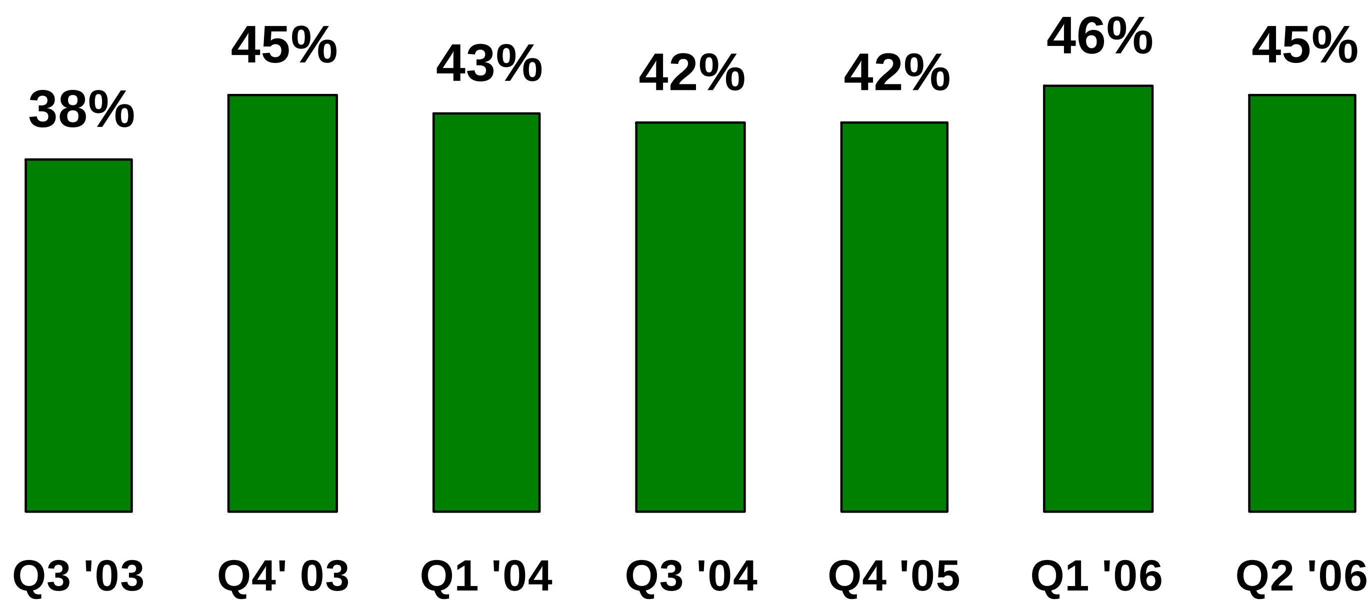
Q45 Have you used any of the following methods to reduce your mobile phone usage costs abroad?

Internet Usage

Key Findings

- Consistent with previous quarters, over 4 in 10 of respondents personally use the internet from any location. These respondents are more likely to be aged 15-44 years of age. In terms of specific locations, two thirds use the internet from home and 12% use the internet at school/college.
- More than 3 in 10 have an internet connection in their home (35%), with those aged 65+ less likely to do so. Of those who don't have a home connection, 31% said they are likely to get a connection in the future.
- Eircom continues to lead as the main Internet Access Provider with 81% of respondents choosing to use them.
- Standard telephone dial-up remains the main method for consumers connecting to the internet (46%).
- 46% of those connecting to the internet via a narrowband connection claim not to connect via broadband because it is not available in their area. However, only 31% of those narrowband users attempted to get a broadband connection to their home and were told that it was not available to them. This suggests that not all narrowband users who claimed that they cannot get broadband, have actually tried to get a broadband connection.
- Broadband availability seems to be a bigger issue outside Dublin than it is in the greater Dublin area.
- Over 4 in 10 (42%) of internet users are aware of VOIP, up from 35% in quarter 4 2005. These respondents are typically male and aged between 25-44 years old. 23% of those aware of the existence of VOIP have actually used this service.

Internet Usage
Base: All Respondents N = 1,017



Q43 Do you personally use the internet from any location?

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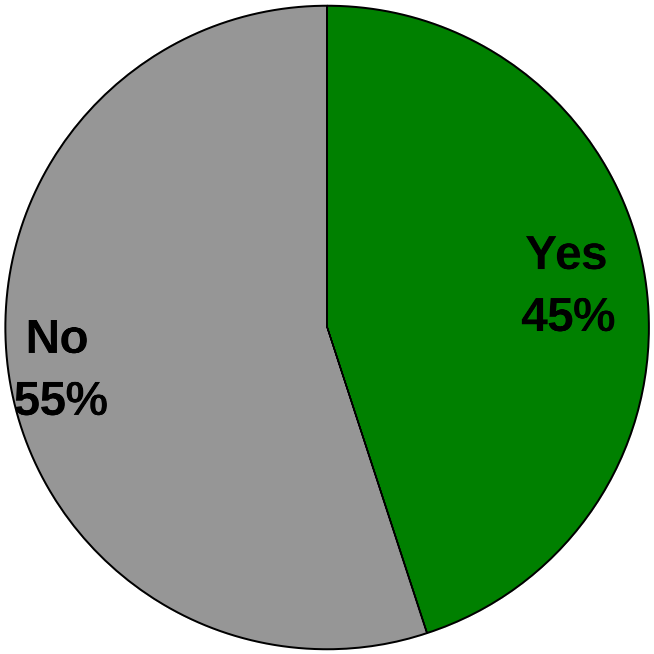
Internet Usage
Base: All Respondents N = 1,017

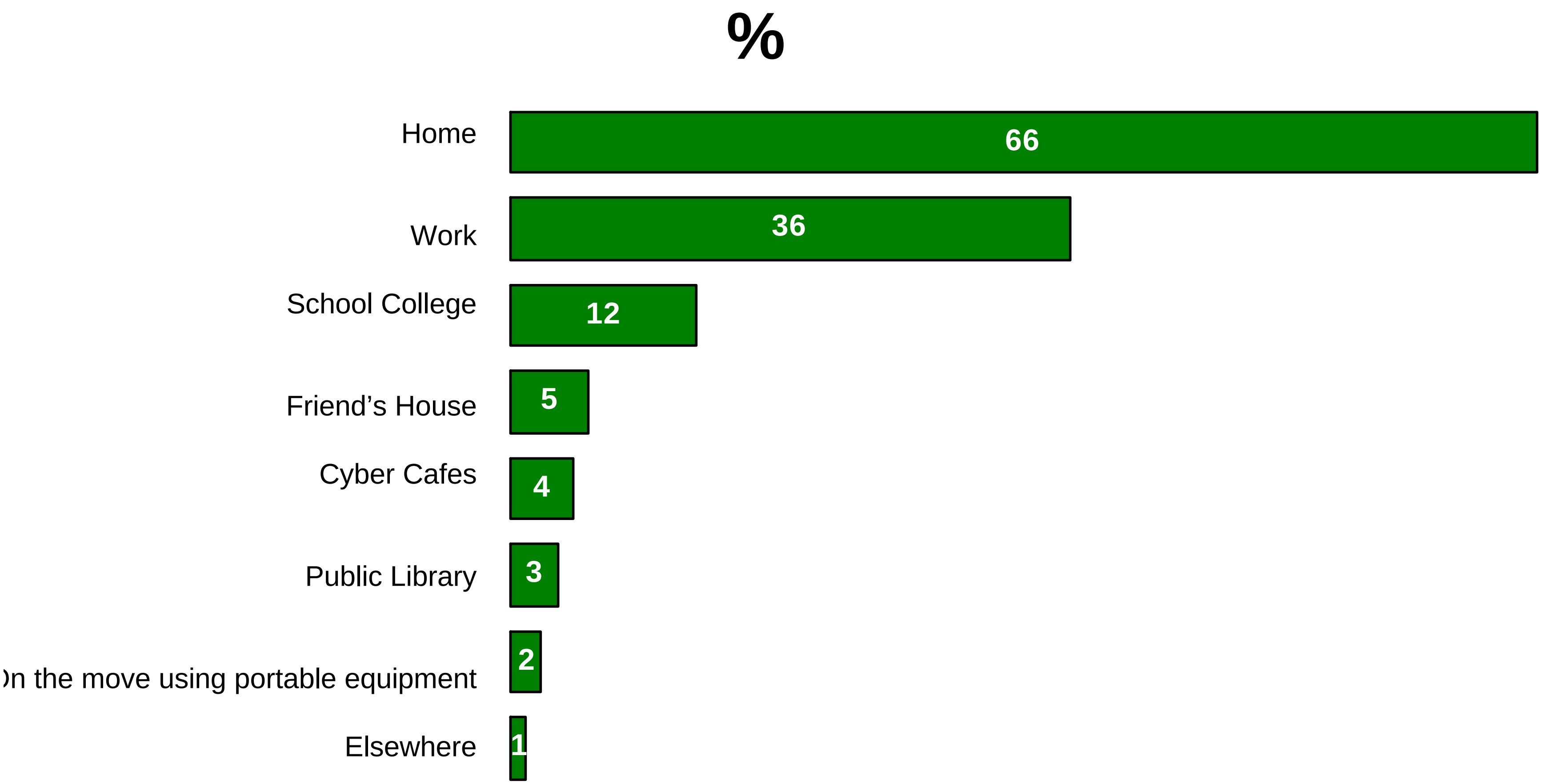


Percentage who said yes:

Gender	
Male	48%
Female	42%
Age	
15-24	63%
25-44	54%
45-64	30%
65-74	14%
Region	
Dublin	45%
ROL	42%
Munster	48%
Conn/Ulster	44%

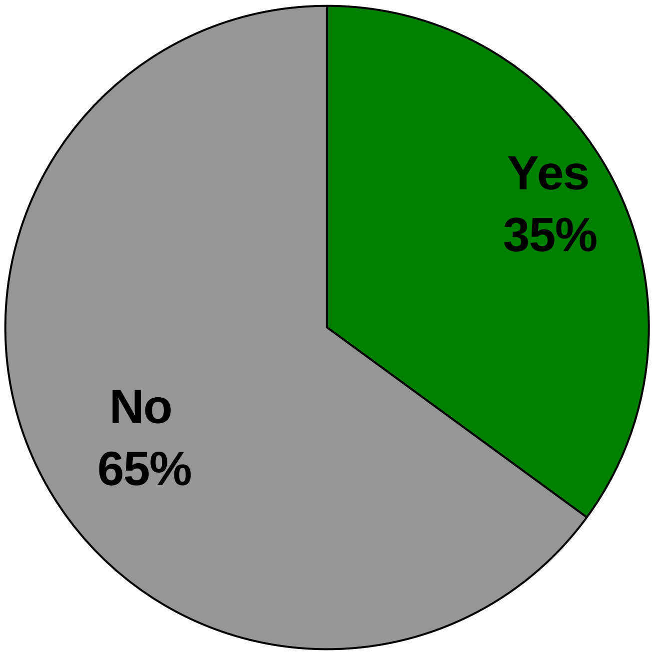
Q46 Do you personally use the internet from any location?

Main Internet Usage Locations
Base: Personally Uses Internet From Any Location N = 459



Q44 From which of the following locations do you use the internet?

Home Internet Connections
Base: All Respondents N = 1,017

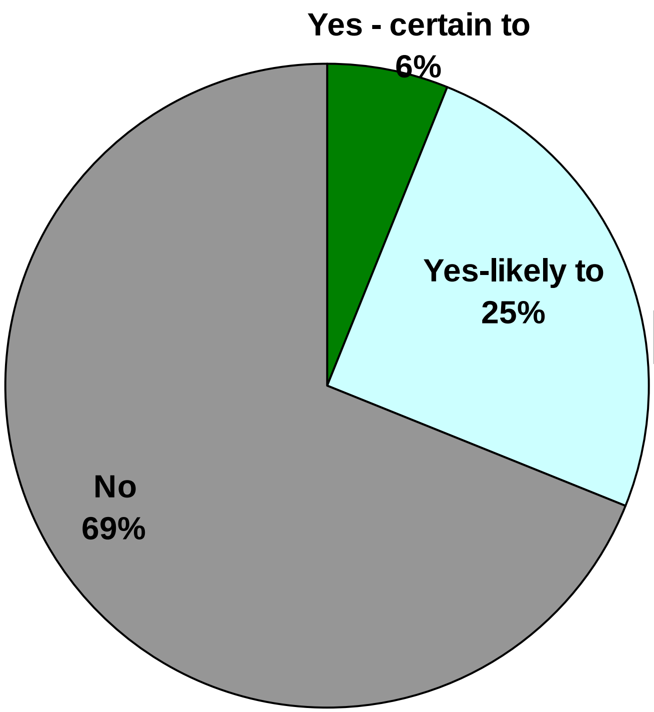


Percentage who said yes:

Gender	
Male	36%
Female	34%
Age	
15-24	37%
25-44	38%
45-64	34%
65-74	18%
Region	
Dublin	28%
ROL	35%
Munster	41%
Conn/Ulster	37%

Q45 Do you have an internet connection in your home?

Intention to Get Internet Connection In Future
Base: Doesn't Have An Internet Connection At Home N = 665

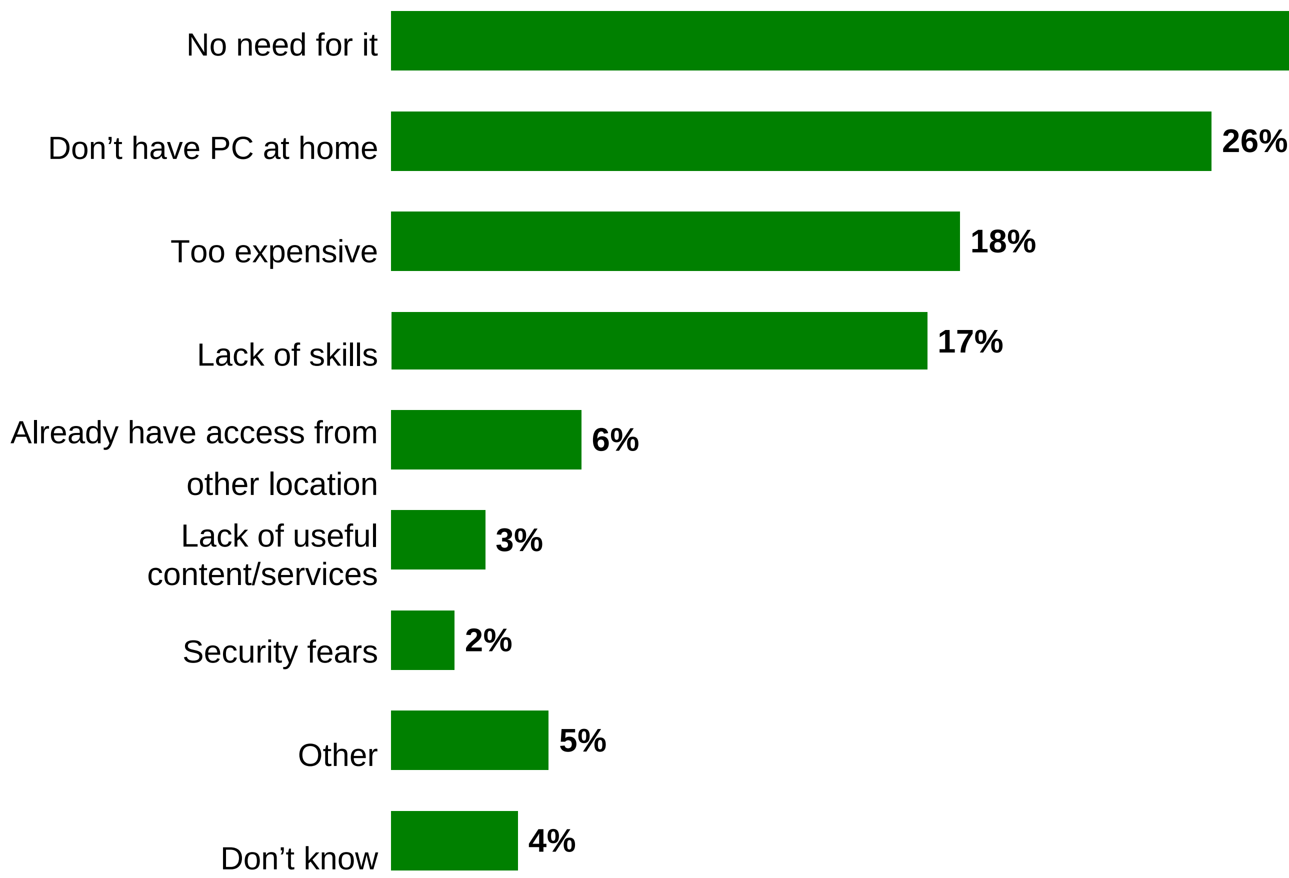


Percentage who said yes (certain/likely) :

<u>Gender</u>	
Male	**31%**
Female	**31%**
<u>Age</u>	
15-24	**43%**
25-44	**39%**
45-64	**22%**
65-74	**4%**
<u>Region</u>	
Dublin	**26%**
ROL	**30%**
Munster	**35%**
Conn/Ulster	**33%**

Rationale For Not Getting The Internet At Home

Base: Doesn't Intend Getting A Home Internet Connection In Future N =452

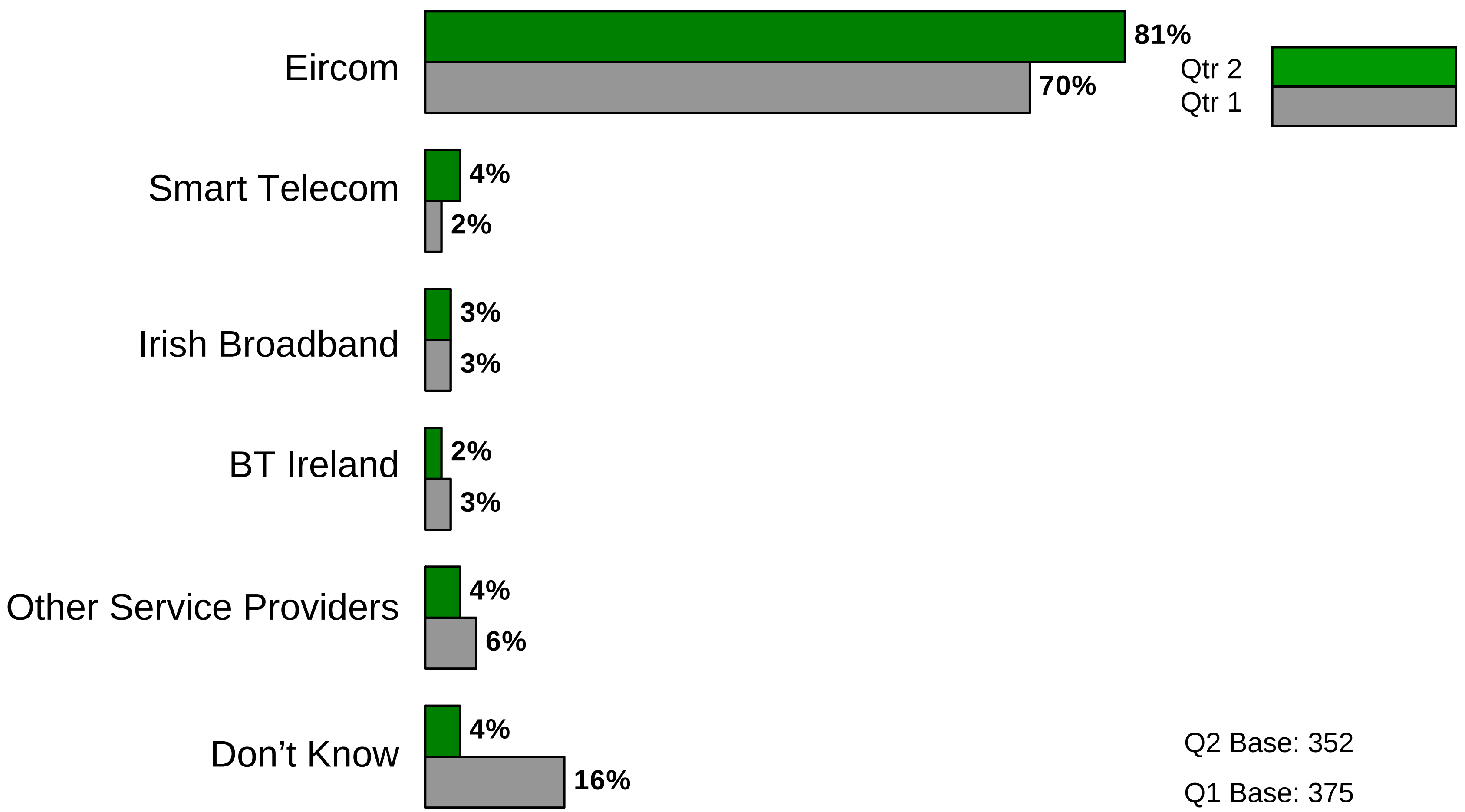


Percentage who said no need:

Gender	
Male	35%
Female	30%
Age	
15-24	20%
25-44	28%
45-64	38%
65-74	44%
Region	
Dublin	31%
ROL	44%
Munster	19%
Conn/Ulster	39%

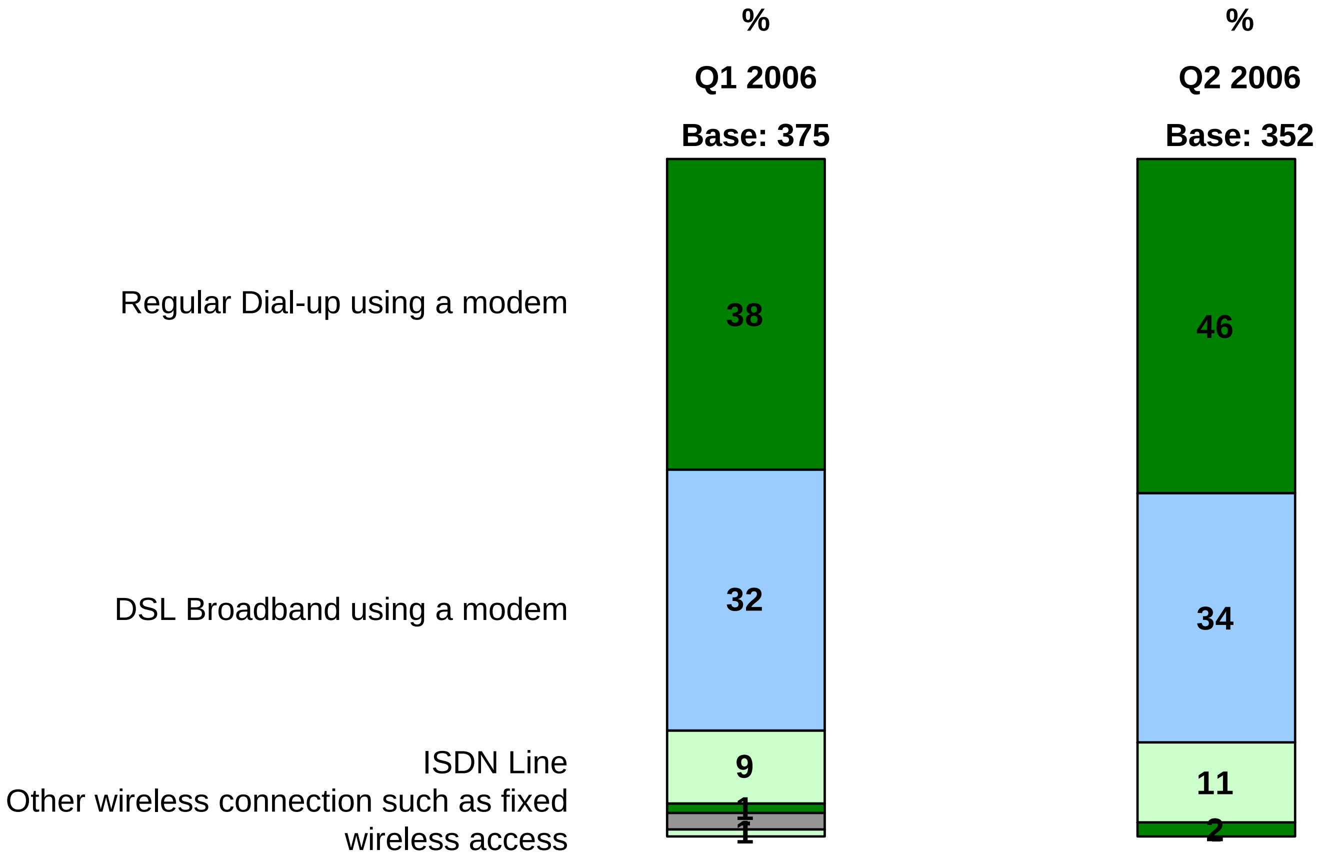
Q50 Why do you say you won't get the internet at home?

Home Internet Service Providers
Base: Has An Internet Connection At Home



Q48 Who is your home Internet Service Provider?

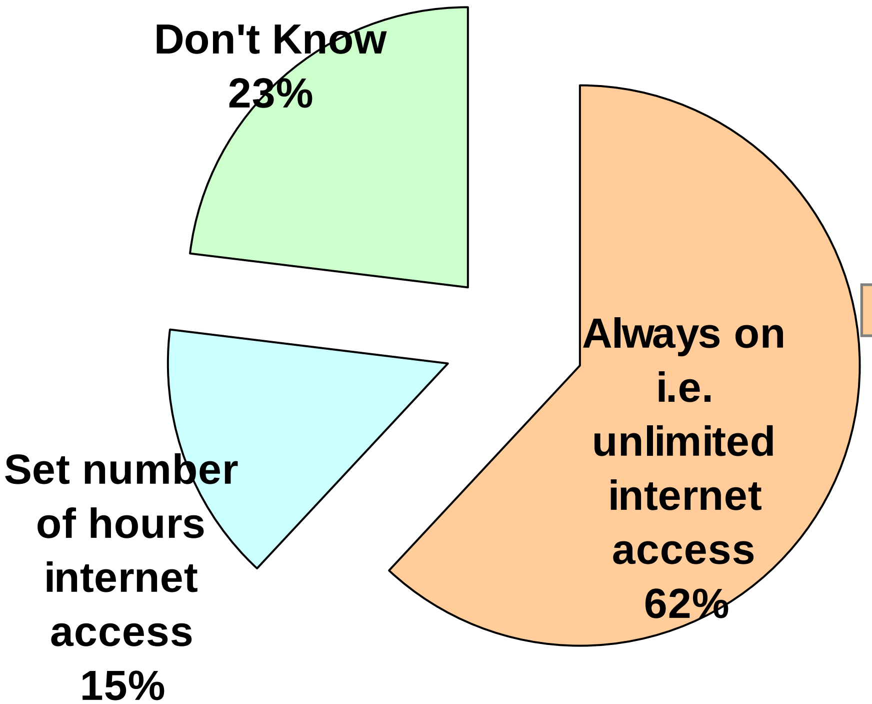
Methods of Home Internet Connections
Base: Has An Internet Connection At Home



	Q1 2006	Q2 2006
Other	5%	3%
Don't Know	16%	3%
Don't Connect	-	1%

Q49 How do you connect to the internet from home?

Type of Broadband Connection
Base: Broadband Users N = 119

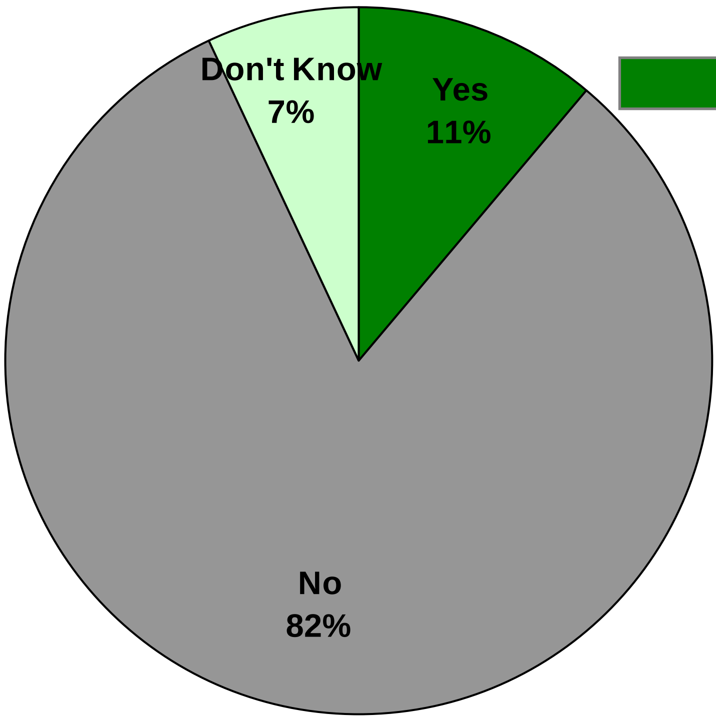


Percentage who said don't know:

Gender	
Male	22%
Female	24%
Age	
15-24	32%
25-44	14%
45-64	31%
65-74	100%
Region	
Dublin	30%
ROL	17%
Munster	28%
Conn/Ulster	4%

Q53 Is your broadband connection one where you have a set number of hours per month or an always –on connection?

Level of Broadband Provider Switching
Base: Broadband Users N = 119

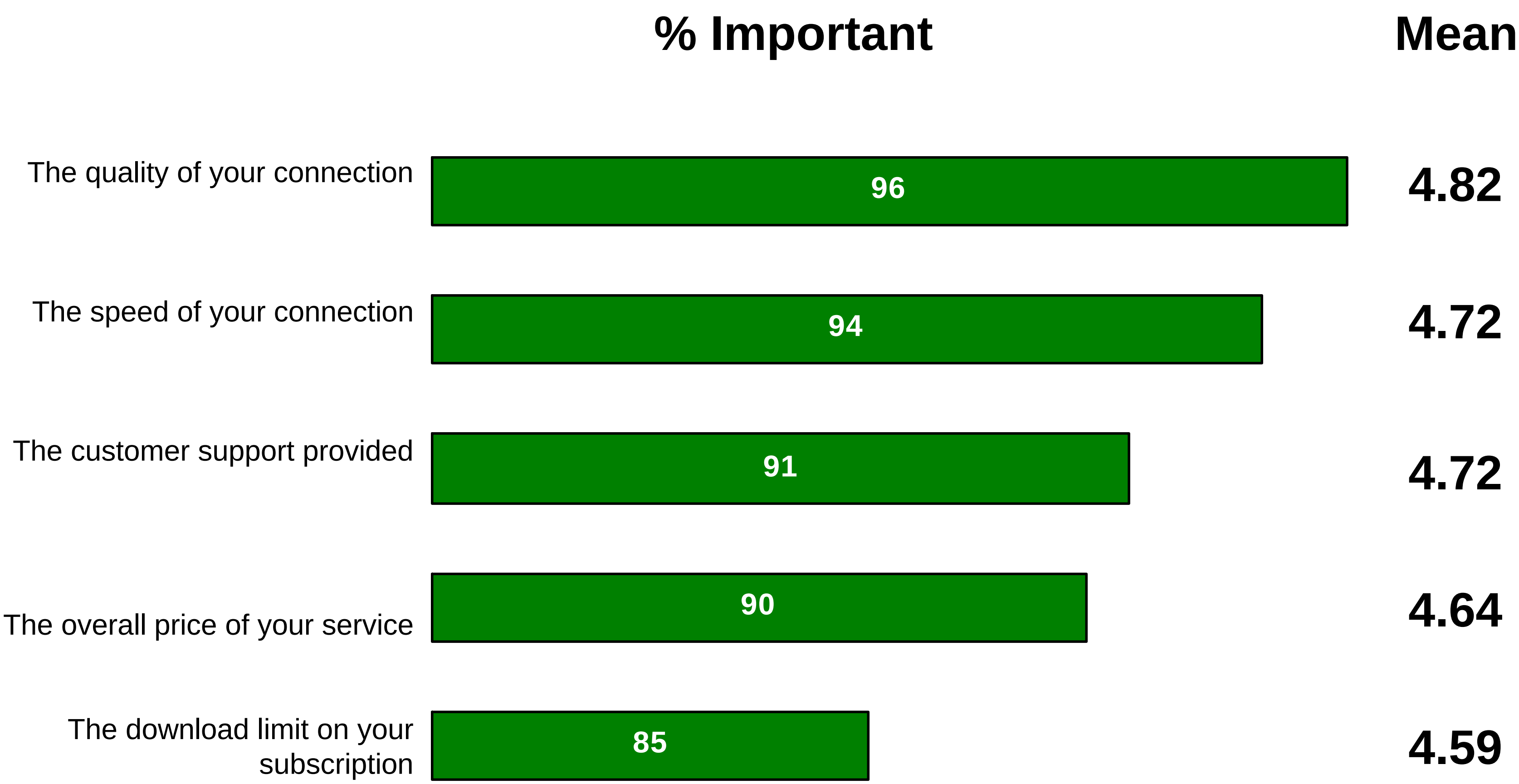


Percentage who said yes:

Gender	
Male	16%
Female	5%
Age	
15-24	9%
25-44	15%
45-64	4%
65-74	0%
Region	
Dublin	10%
ROL	10%
Munster	12%
Conn/Ulster	13%

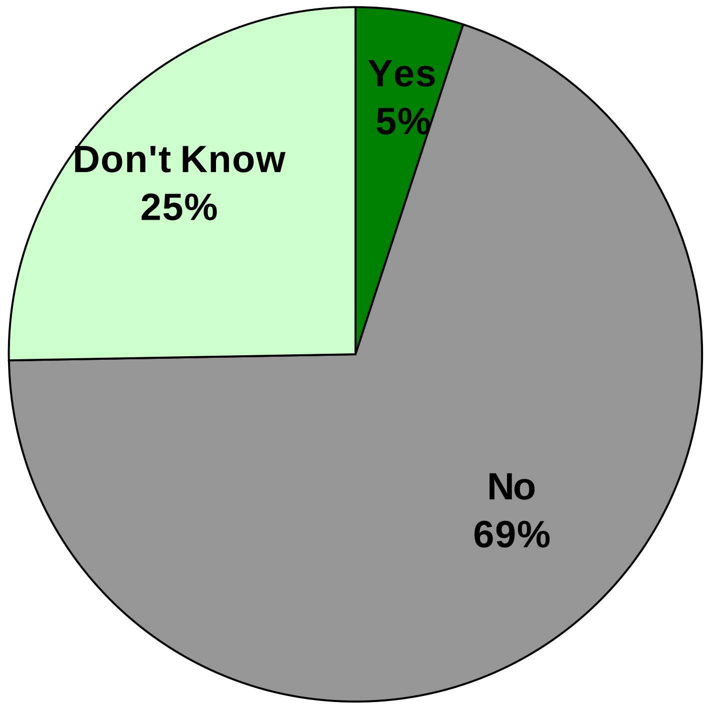
Q51 Have you switched your broadband provider in the last 12 months?

Important Factors for Broadband Provider Selection
Base: Broadband Users N=119



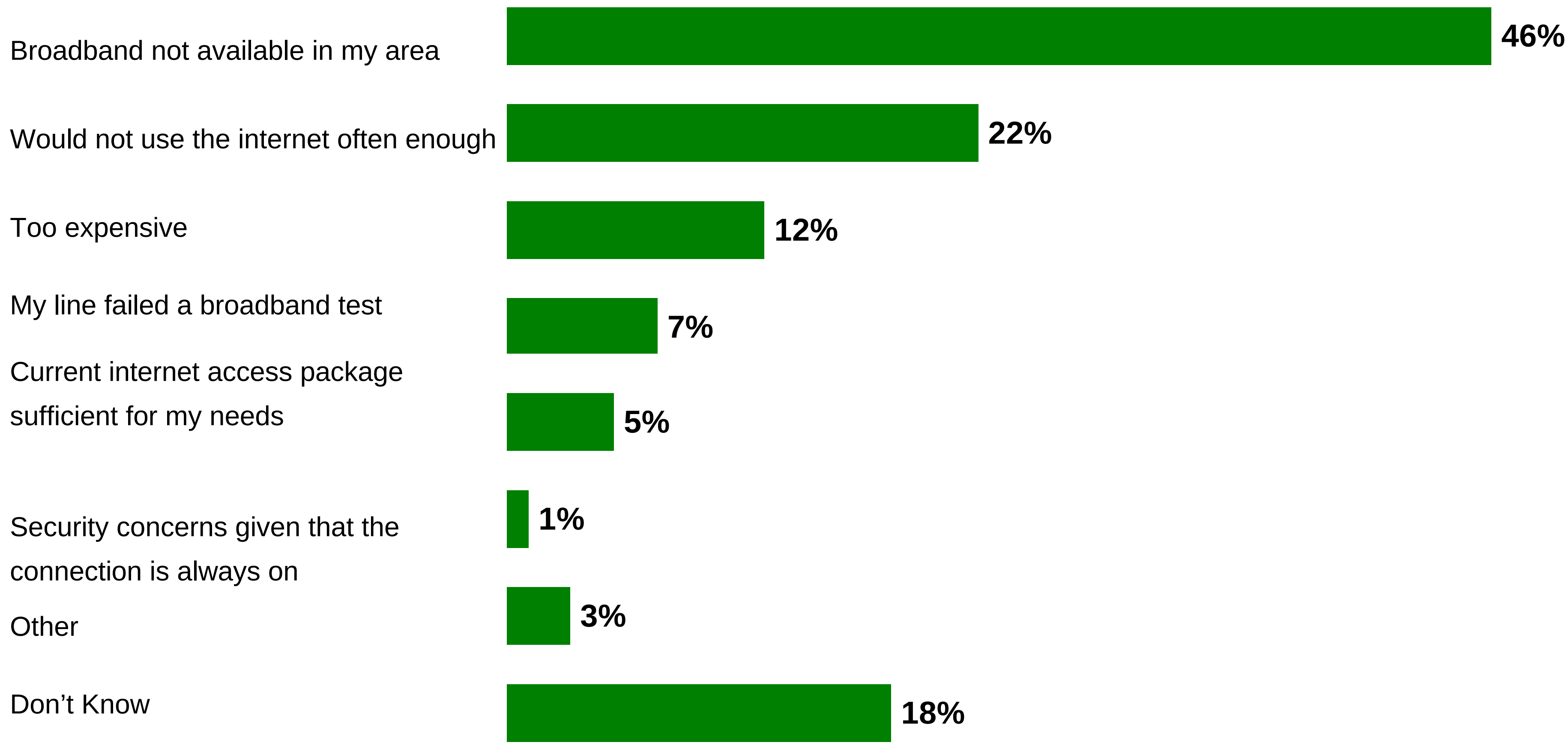
Q53 On a scale of 1-5 where 1 means very important and 5 means not at all important, how would you rate the following factors when selecting a broadband connection?

Ownership of Dial-up Subscriptions and Broadband Service
Base: Broadband Users N = 119



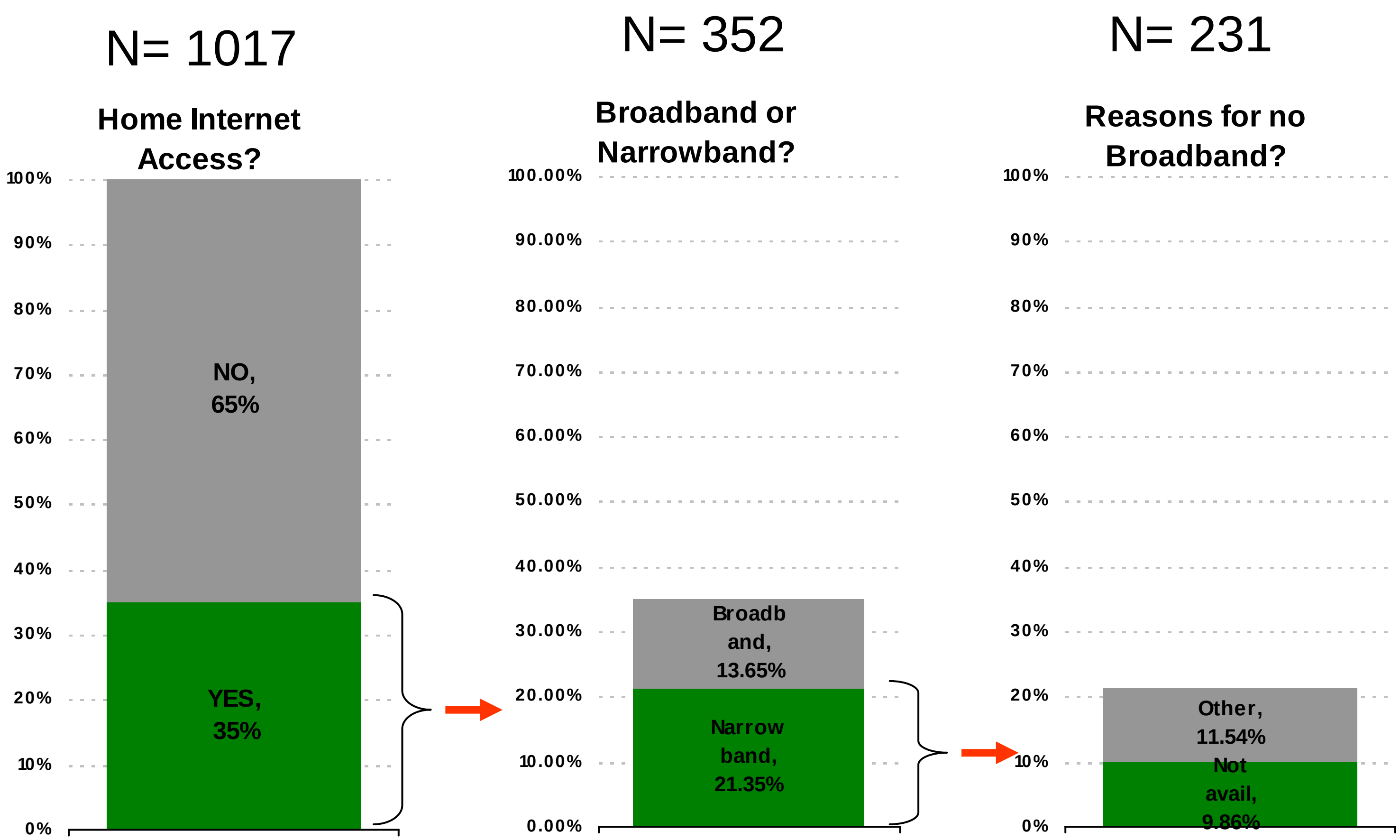
Q54 Do you also have a dial-up subscription in addition to your broadband service?

Rationale For Not Using a Broadband Connection
Base: Internet Connects By Method other than Broadband N = 231



Q56 What are your reasons for not using a broadband connection?

Rationale For Not Using a Broadband Connection
Base: All respondents N=1017



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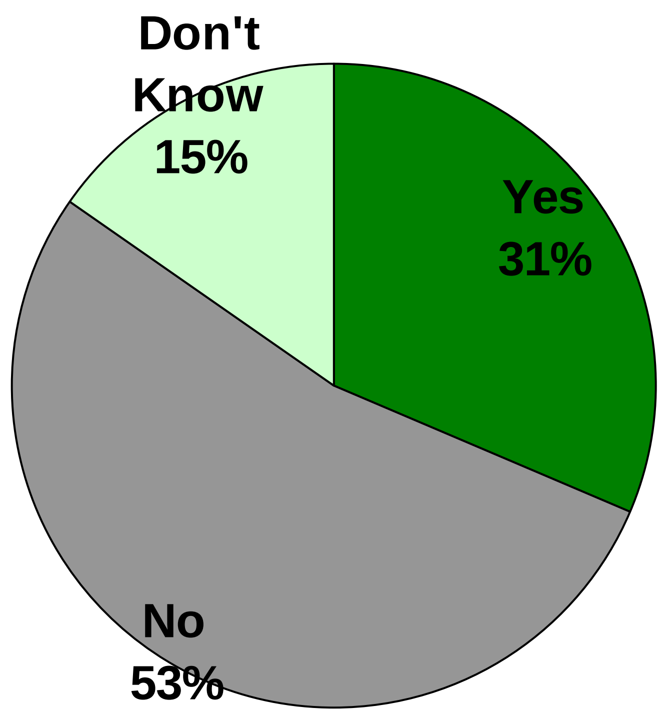
Unavailability of Broadband
Base: Internet Connects By Method other than Broadband N = 231

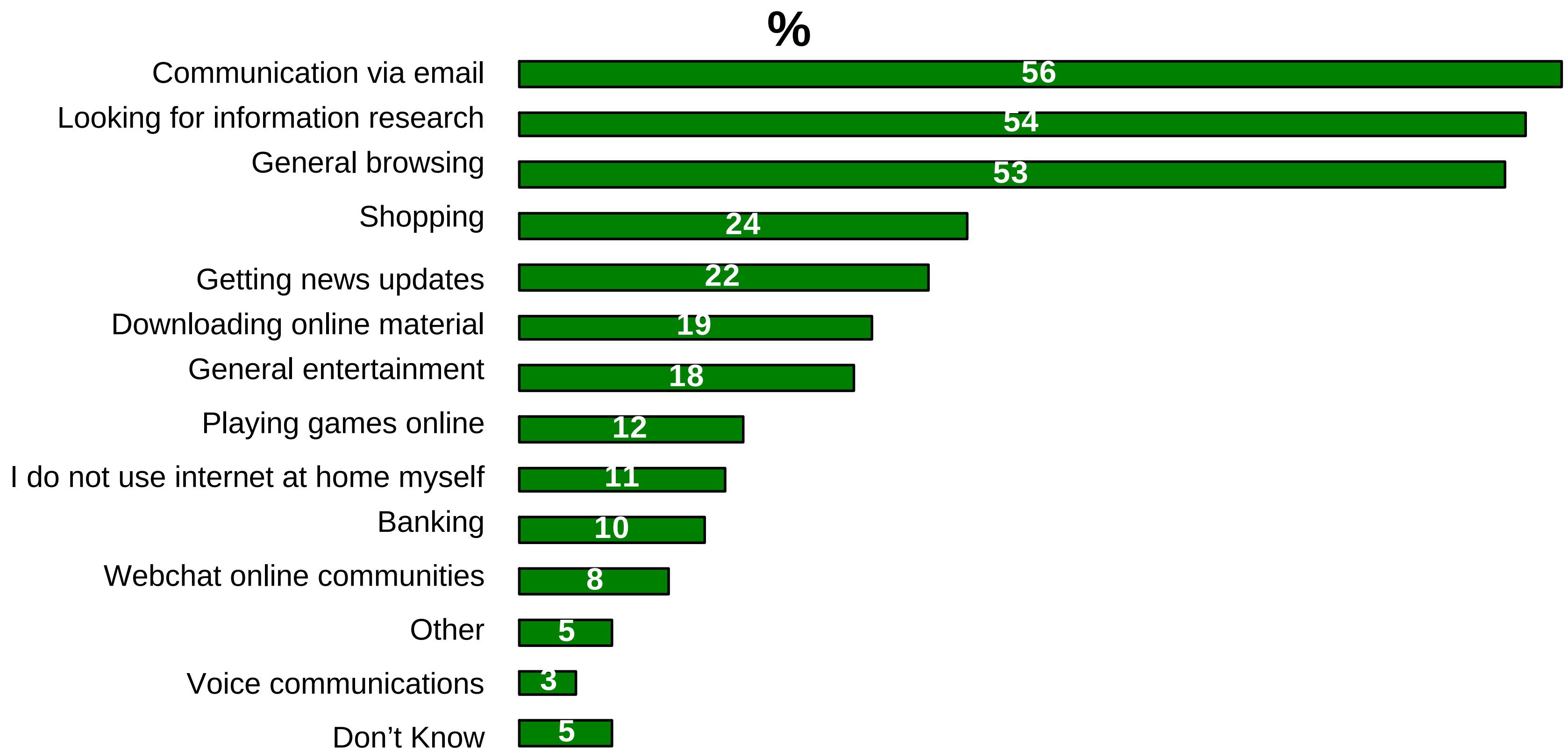


Profile of those who said yes:
N=72

Gender	
Male	35%
Female	28%
Age	
15-24	22%
25-44	38%
45-64	30%
65-74	32%
Region	
Dublin	9%
ROL	40%
Munster	30%
Conn/Ulster	33%

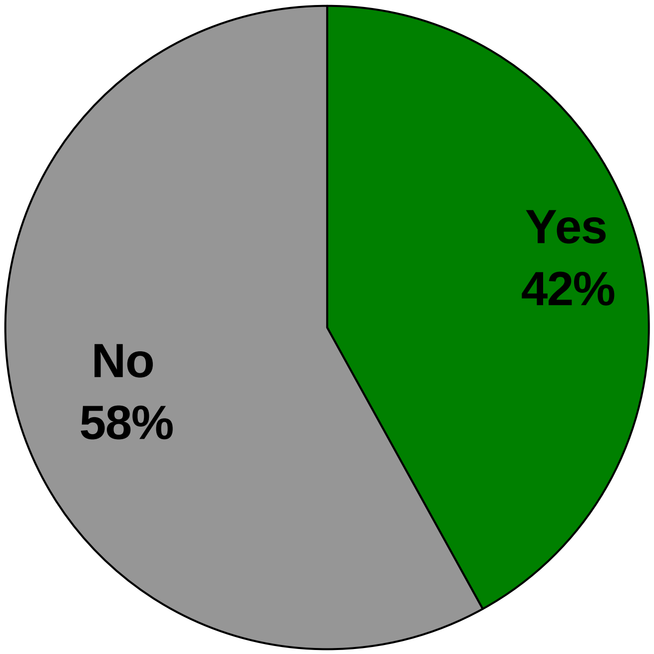
Q57 Have you ever attempted to get a broadband connection to your home and were told that it was not available to you?

Main Activities Internet Connection Used For
Base: Has a Home Internet Connection N = 352



Q58 What activities do you use your home internet connection for?

Awareness of VOIP
Base: Has a Home Internet Connection N = 352

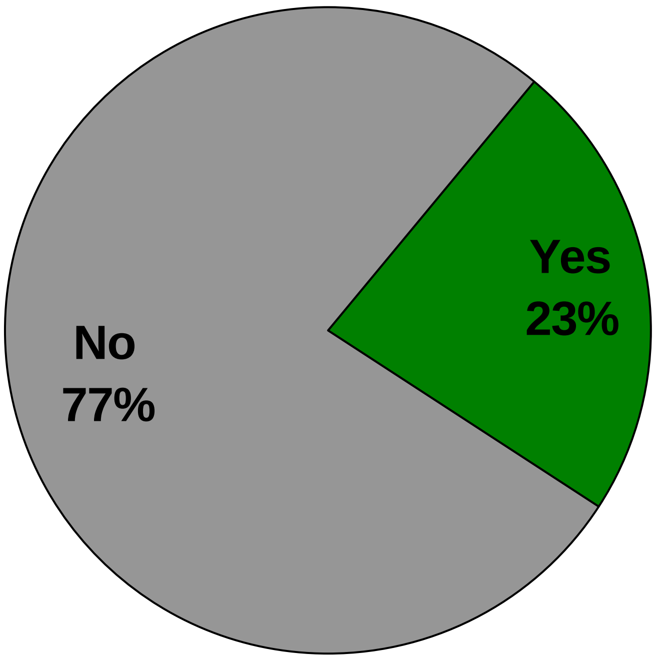


Percentage who said yes:

Gender	
Male	46%
Female	38%
Age	
15-24	54%
25-44	49%
45-64	28%
65-74	6%
Region	
Dublin	40%
ROL	45%
Munster	42%
Conn/Ulster	39%

Q59 Have you ever heard of VOIP?

Use of VOIP
Base: Has Heard of VOIP and has home Internet access N = 146



Percentage who said yes:

Gender	
Male	29%
Female	16%
Age	
15-24	22%
25-44	27%
45-64	17%
65-74	-
Region	
Dublin	24%
ROL	29%
Munster	17%
Conn/Ulster	25%

Q60 Have you ever used VOIP to make a call over the internet?

Conclusions

Conclusions

- The first two waves of consumer technology trends for 2006 continue to see the gradual decline of fixed line telephones in the home, while mobile telephone penetration remains stable. Younger respondents and those in the rental sector are least likely to have a fixed line subscription.

- 1 in 3 have their fixed line number registered as ex-directory, particularly females and older age groups. Fixed line provider switching has occurred among 15% of respondents with fixed lines in the last 12 months. Awareness of multiple Directory Enquiries services is quite high with Eircom's 11811 number being the most frequently used.

- Mobile penetration has dropped marginally by 4% to 80% (a 1% decline outside the margin of error) compared to quarter 1, suggesting that market penetration is almost reaching saturation. Almost 1 in 10 has more than one mobile account.

Conclusions

- In line with previous surveys, over three quarters of respondents use the pay as you go service. Not surprisingly there is a higher concentration of pre-paid phones among those who are less likely to have a regular income or job i.e. those aged 15-24 and 65 +. Vodafone and O2 continue to retain a large share of the consumer mobile market with 53% and 33% respectively.

- 34% of Irish internet households connect via broadband. This penetration level will be likely to increase throughout the latter half of 2006.

- There has been slight growth in the awareness and usage of VOIP mobile phone services since 2005 and we expect that this trend will continue into 2006.

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independent insight

Appendix: Note on Methodology

Methodology

- 1,017 people surveyed aged 15 – 74.
- Fieldwork conducted: May - June 2006.
- Nationally representative survey with inter-locking controls set for age, gender, and marital status. Non-interlocking controls set for social class and region.
- Findings weighted up to represent the full population of adults aged 15-74 in the Republic of Ireland based on the most recent findings from the CSO.
- Given a sample size of just over 1,000 there is a margin of error of +/-3%.
- Surveys were conducted face-to-face in respondents' own homes at over 101 different locations throughout the Republic.

Data Interpretation

- The table opposite shows the margin of error for a range of unweighted sample sizes
- If 20% of a total sample of 1,000 adults say they do something, you can be 95% certain that the figure for the population lies between 17% and 23% (i.e. there is a margin of error of 3%)
- As the sample size is reduced the margin of error increases
- To determine the margin of error on a particular section look at the unweighted sample size on each question i.e. the "n" (number of respondents to that question) at the base of each slide

Percentage of respondents who said…	1,000	500	100
10%	+/-2%	+/-3%	+/-6%
20%	+/-3%	+/-4%	+/-8%
25%	+/-3%	+/-4%	+/-8%
40%	+/-3%	+/-5%	+/-10%
50%	+/-4%	+/-5%	+/-10%
60%	+/-3%	+/-5%	+/-10%
75%	+/-3%	+/-4%	+/-8%
80%	+/-3%	+/-4%	+/-8%
90%	+/-2%	+/-3%	+/-6%

- If the "n" or number of respondents to a particular question falls below **75** the findings are in no way representative and should be only regarded as indicative and not overly analysed or interpreted

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Thank You

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