ComReg Trends Survey Q4 2006

Survey Results

Prepared by Amárach Consulting

Contents

Introduction

Introduction

- The research contained in this report is based on a quarterly survey by Amárach Consulting of 1,001 adults throughout Ireland, aged 15-74.

- The survey was conducted from 15th November – 5th December, 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 phone usage
  - Mobile phone usage
  - Internet usage

- 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.

Fixed Phone Usage

Key Findings

- Fixed and mobile penetration within the residential sector remain relatively stable this quarter, with mobile penetration appearing to have reached market saturation in terms of its adoption in the residential sector.
- Almost 6 in 10 of those without a fixed line in the home cite having a mobile subscription as their main reason for not subscribing to a fixed line in the home. 24% of those without a fixed line, previously had a subscription at their current address.
- eircom continues to remain the largest residential phone provider (78%) and directory enquiry provider (67%) in the Irish residential sector.
- Just over 4 in 10 individuals subscribe to bundled services from their fixed line provider. The most popular choice of bundle is a fixed priced package for voice calls and line rental.
- Nearly 5 in 10 individuals cited convenience and 4 in 10 highlighted cost savings as the two main determining factors in subscribing to bundled fixed line services.
- Only 3% of those with a fixed line stated they would definitely switch telephone service providers in the next three months. Overall, 6 in 10 individuals stated they are unlikely to switch, with 77% of those citing satisfaction with their current supplier as the underlying reasoning for remaining loyal. 13% of those who did not switch cited the hassle involved in switching as the reason why they would not switch fixed line provider

Key Findings

- Average bi-monthly spend in this quarter was reported as €99.61, a decrease of 4% since Q3.

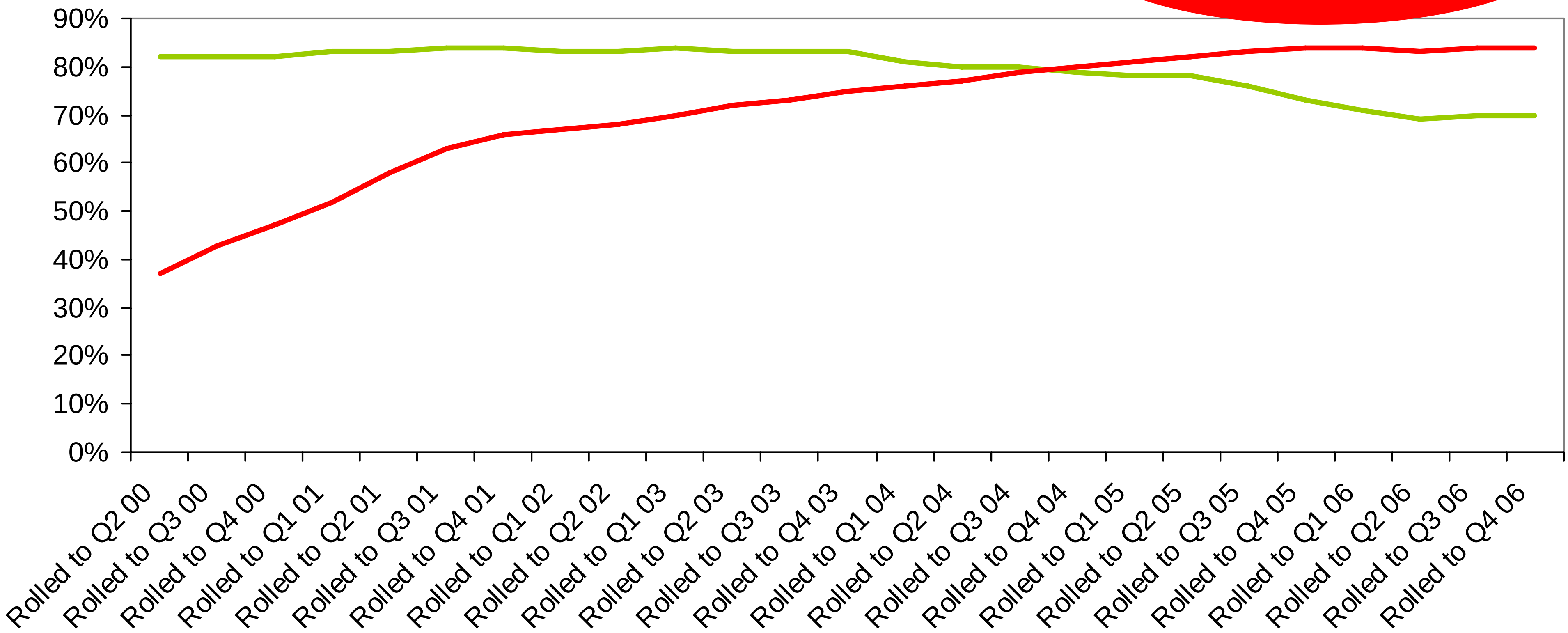
- The majority of fixed line customers do **not** believe their mobile phone is a substitute for their fixed line phone. Those most likely to believe this were those who run a business from home (65%) and have home Internet access (45%). In comparison, those most likely to believe their mobile phone was a substitute for a fixed line were part of the 15-24 age cohort and students.

Mobile & Fixed Penetration – 12 month Rolling average

Base: All Respondents

Rolled to Q4 2006
Mobile Level: 84%
Fixed Line Level: 70%

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



A rolling average trend uses an average of current data, and that of the three preceeding periods to provide an average figure. Each quarters data is treated similarly producing a "rolled" average figure for fixed line penetration over time. The current period responses are further provided on this slide.

*Source: ComReg Trends Survey, **1999-2006***

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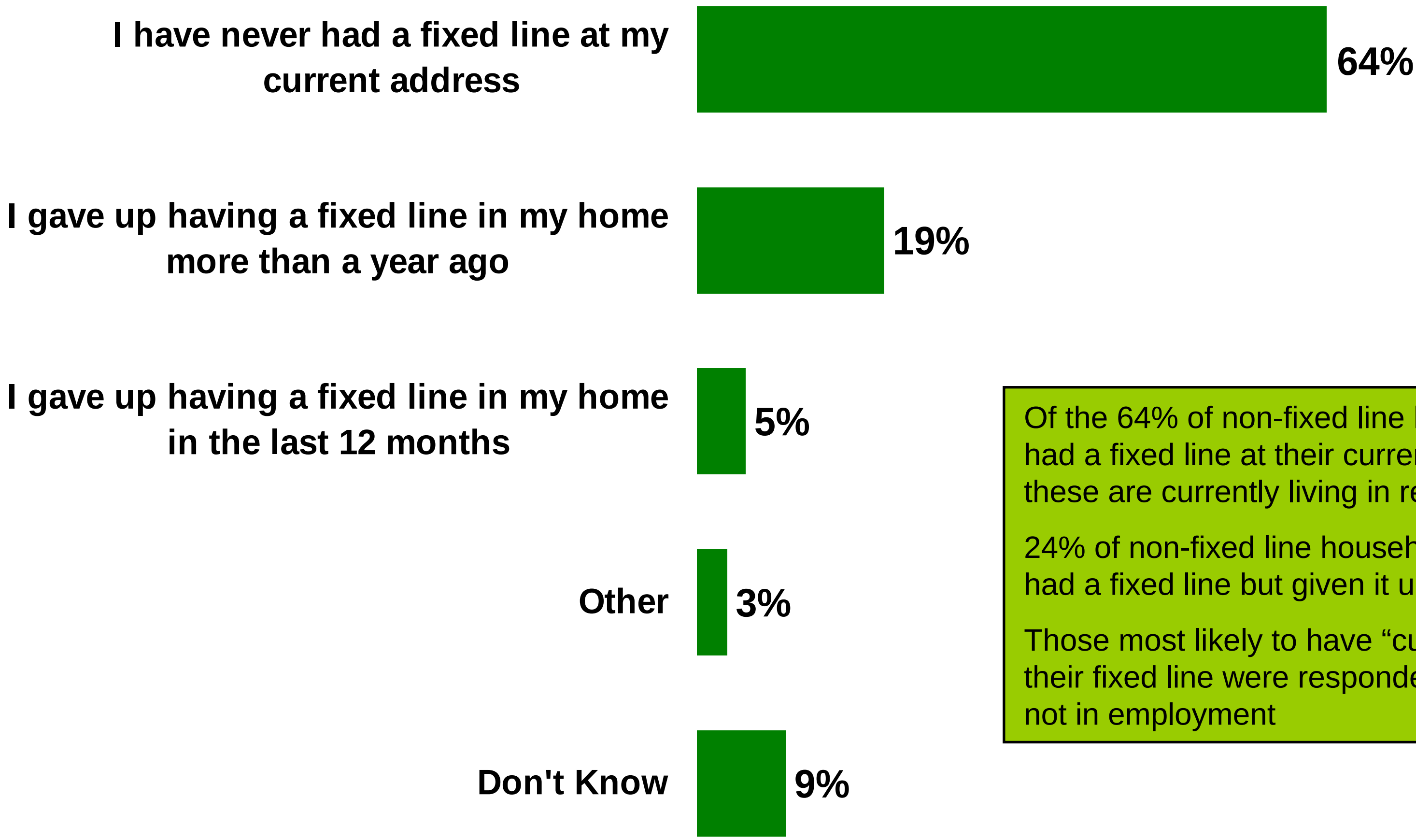
Past Fixed Line Connection

Base: Doesn’t Have a Fixed Line Phone N = 314



Of the 64% of non-fixed line homes who have never had a fixed line at their current address, the majority of these are currently living in rented accommodation

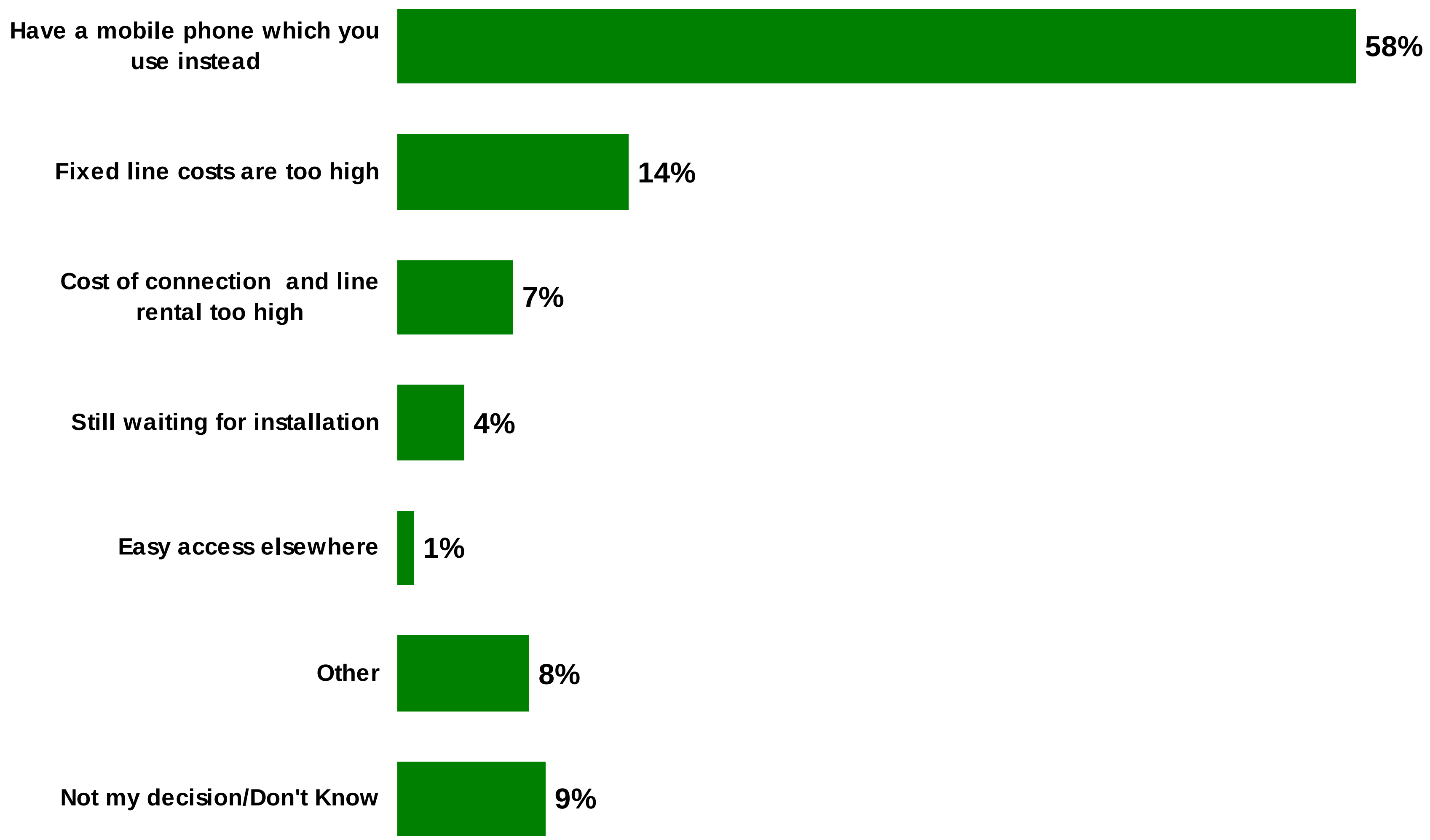
24% of non-fixed line households have at some time had a fixed line but given it up.

Those most likely to have “cut the cord” in giving up their fixed line were respondents who were currently not in employment

Q2 Have you ever had a fixed line connection at your current address?
Q3 Which of the following situations applies in your home?

Reasons for Not Having a Fixed Line

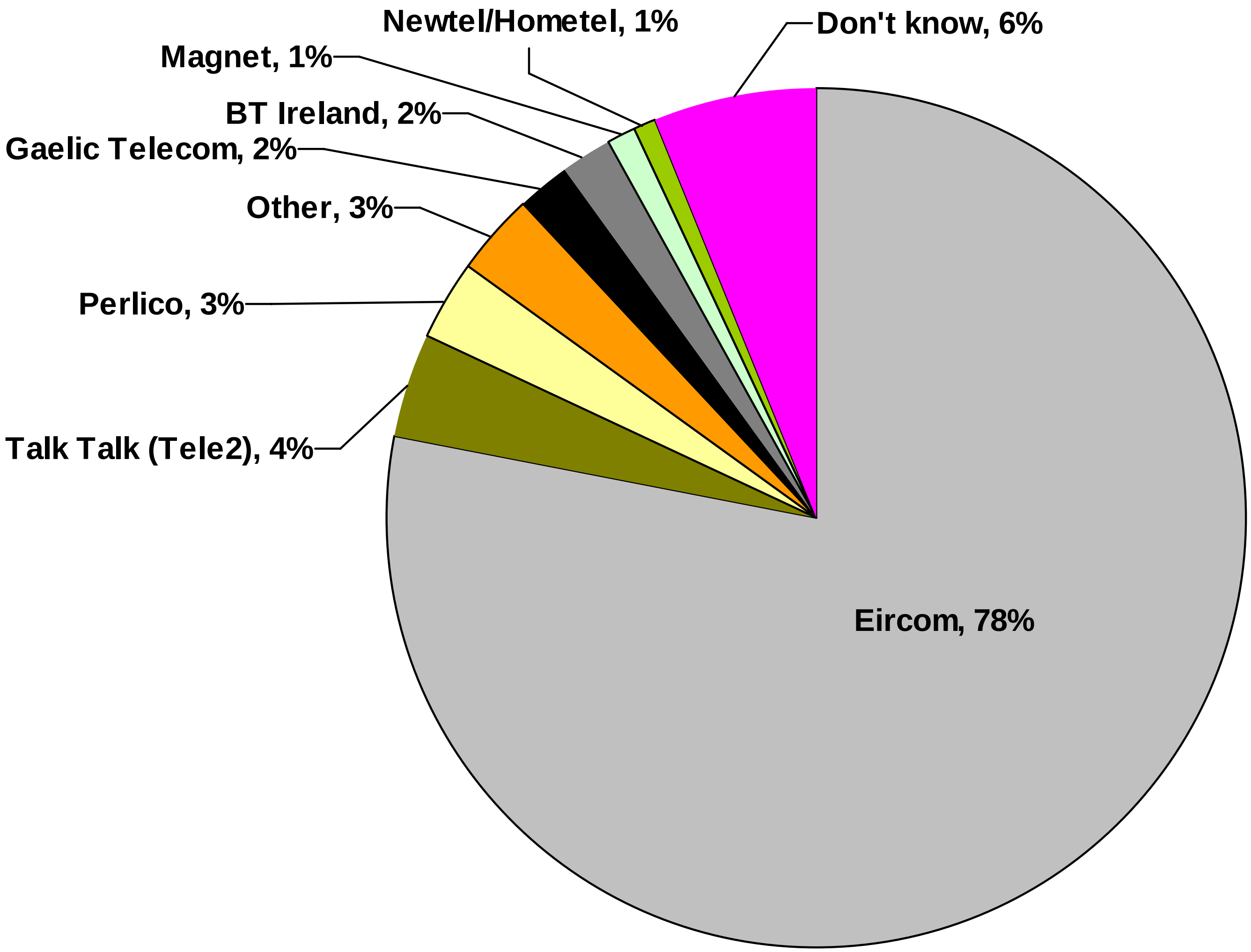
Base: Doesn't Have a Fixed Line Phone N = 314



Q4 What is your main reason for not having a fixed line telephone in your home?

Residential Phone Service Providers

Base: Has a Fixed Line Phone N = 687



eircom continues to be the largest operator in the residential fixed line market. In Q4 2005, 81% of respondents reported using eircom for their fixed line voice service.

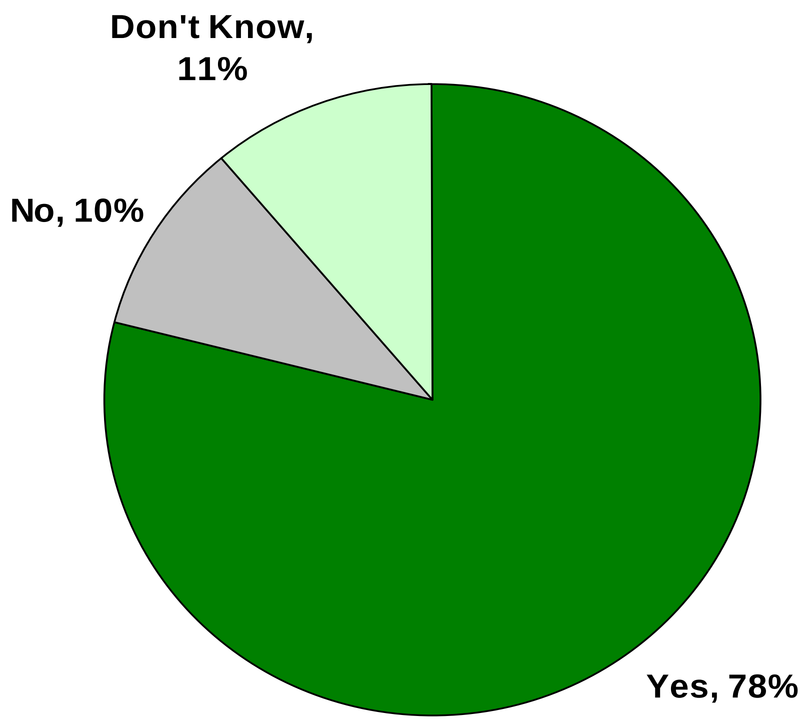
Talk/Talk and Perlico both increased market share by 1% from Q3 2006 to Q4 2006.

Market share for Magnet, Newtel/Hometel and BT Ireland remains in line with previous waves.

Q5 Which, if any, of the following companies do you use for your residential phone service?

Receive Single Bill for Line Rental and Calls

Base: Has a Fixed Line Phone, Uses Company Other then Eircom N = 107



Percentage who said Yes:

Male:	**76%**
Female:	**81%**
Age Cohorts	
15-24:	**48%**
25-44:	**86%**
45-64:	**82%**
65-74:	**100%**

Almost 80% of fixed line customers who use an alternative operator in the market, report receiving a single bill for both line rental and calls from that operator, compared to 64% in the same period in 2005.

Q6 Do you receive a single-bill for line rental and calls?
Q7 Why do you not use this service currently? **Base too Small**

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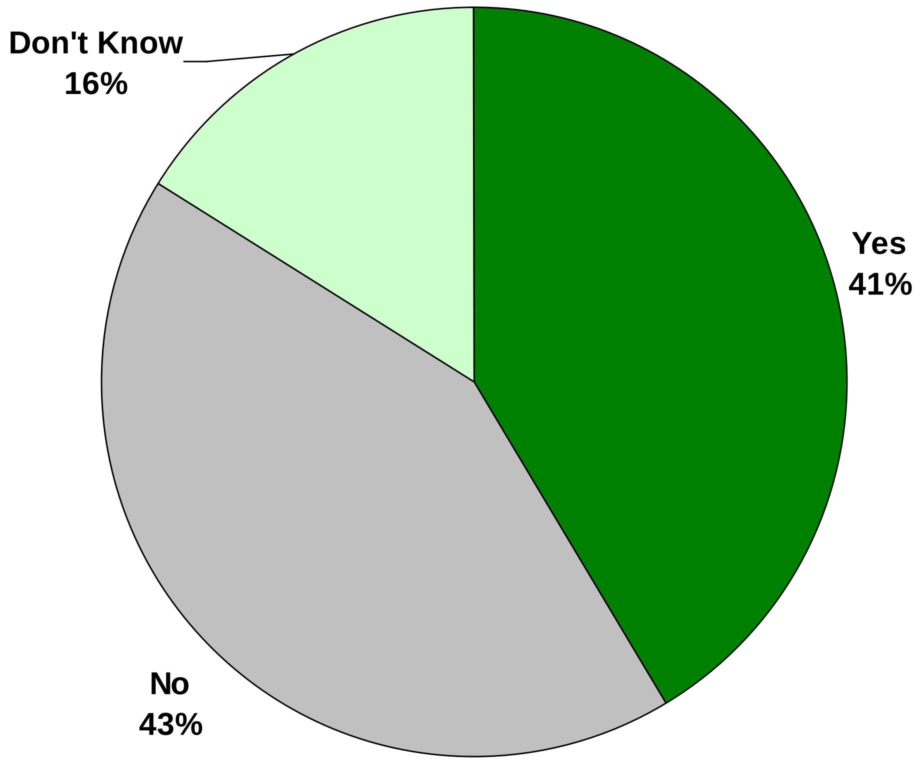
Subscription to Bundled Service

Base: Has a Fixed Line Phone N = 687

Increasingly, fixed line operatoes offer “Bundled” products, where two or more services are offered as a single priced “bundle” such as line rental, a set number of calls and broadband for a fixed monthly fee.



Percentage who said Yes:

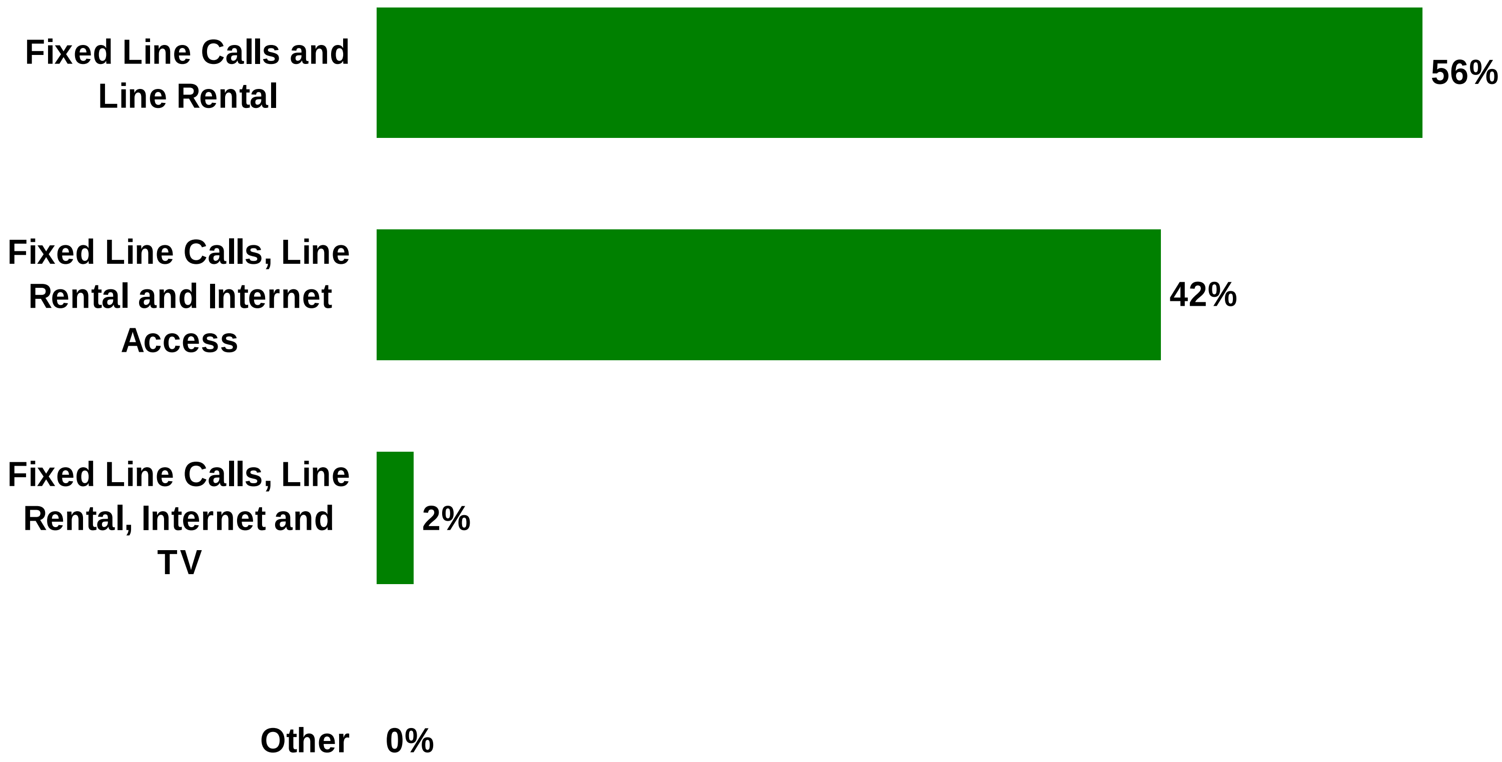
Age Cohorts	
15-24:	**26%**
25-44:	**52%**
45-64:	**41%**
65-74:	**39%**
Region	
Dublin	**38%**
ROL	**48%**
Munster	**44%**
Conn/Leinster	**36%**
Home Internet Access	**50%**

Almost 8 in 10 of those who report using a bundled service are eircom customers, while 16% of fixed line users who subscribe to a bundled service are from other service providers (such as Talk, Talk, Perlico, Gaelic Telecom, BT Ireland, Magnet, Newtel/Hometel and Others).

Q8 Do you subscribe to a bundled service from your provider, for example one which offers an all-in package of calls and line rental?

Types of Bundled Services Used

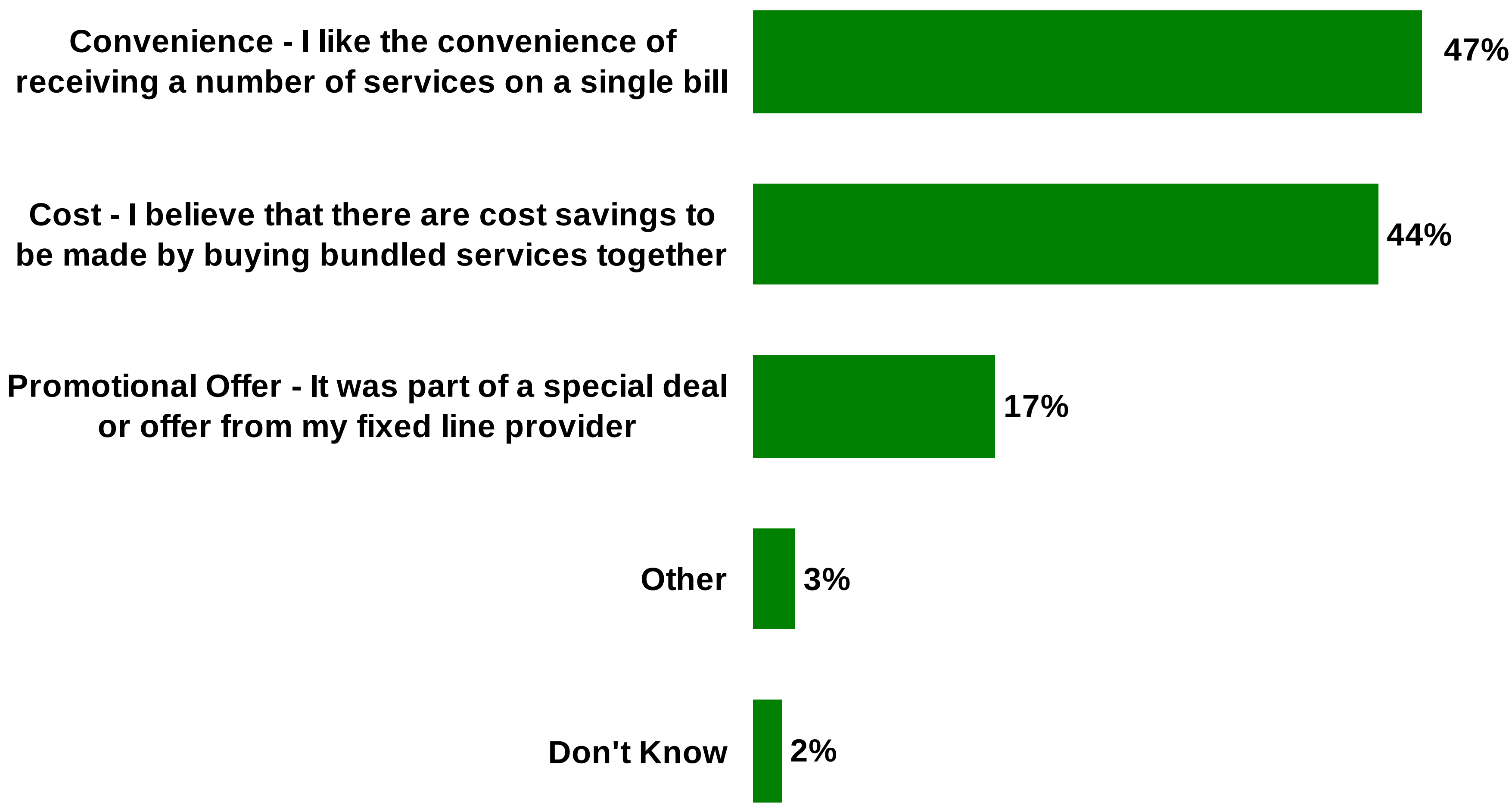
Base: Those who subscribe to a bundled service N = 279



Q9 Which of the following services are bundled together as part of your single-priced package?

Reasons for Subscribing to a Bundled Service

Base: Has a Fixed Line Phone, Subscribes to Bundled Package N = 279



Q10 What are your reasons for subscribing to a bundled service?

Base: Has a Fixed Line Phone, Subscribes to Bundled Package N = 279

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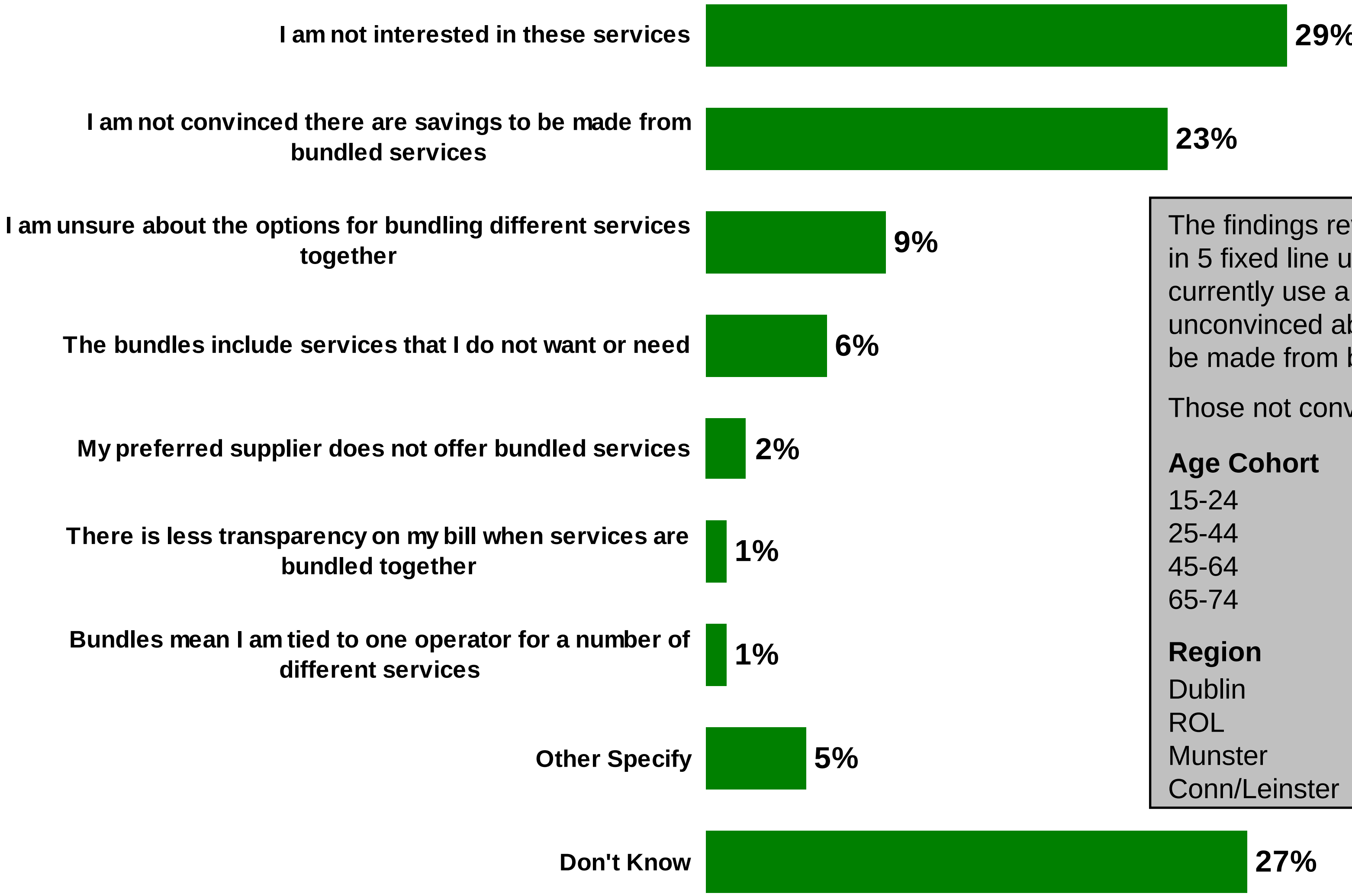
Reasons for Not Subscribing to a Bundled Service

Base: Has a Fixed Line Phone and does not Subscribe to a Bundled Package N = 297



The findings revealed that over 1 in 5 fixed line users who do not currently use a bundle remain unconvinced about the savings to be made from bundled services.

Those not convinced of savings:

Age Cohort	
15-24	15%
25-44	26%
45-64	25%
65-74	14%
Region	
Dublin	18%
ROL	36%
Munster	21%
Conn/Leinster	22%

Q11 What are your reasons for NOT subscribing to a bundled service?

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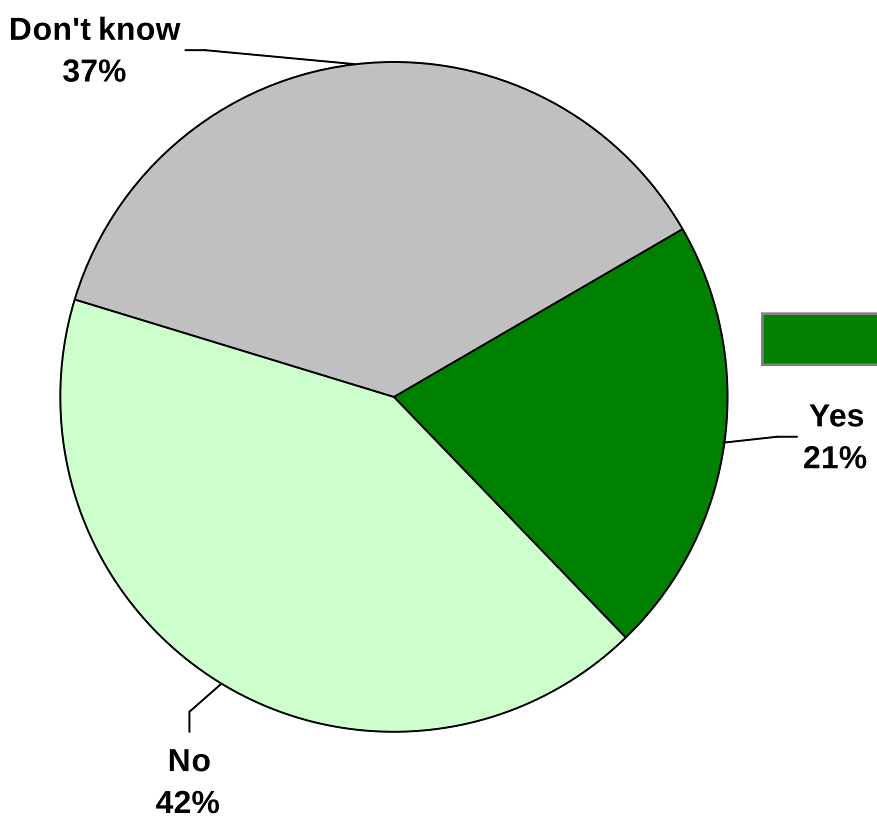
Likelihood of Switching to Bundled Service Offering

Base: Has a Fixed Line Phone, doesn't Subscribe to a Bundled Package N = 408



Percentage who said Yes:

Age	
15-24	**16%**
25-44	**24%**
45-64	**25%**
65-74	**5%**

Only 5% of those aged 65-74 are likely to switch to a bundled service offering. It is possible that those over 65 in our survery may consider bundled services not to be covered under the social welfare telephone package which contributes towards the cost of line rental for older citizens, hence their reluctance to subscribe to a bundled service.

Q12 Would you consider switching to a bundled service offering in the next three months if you believed that you could make savings to your fixed line costs?

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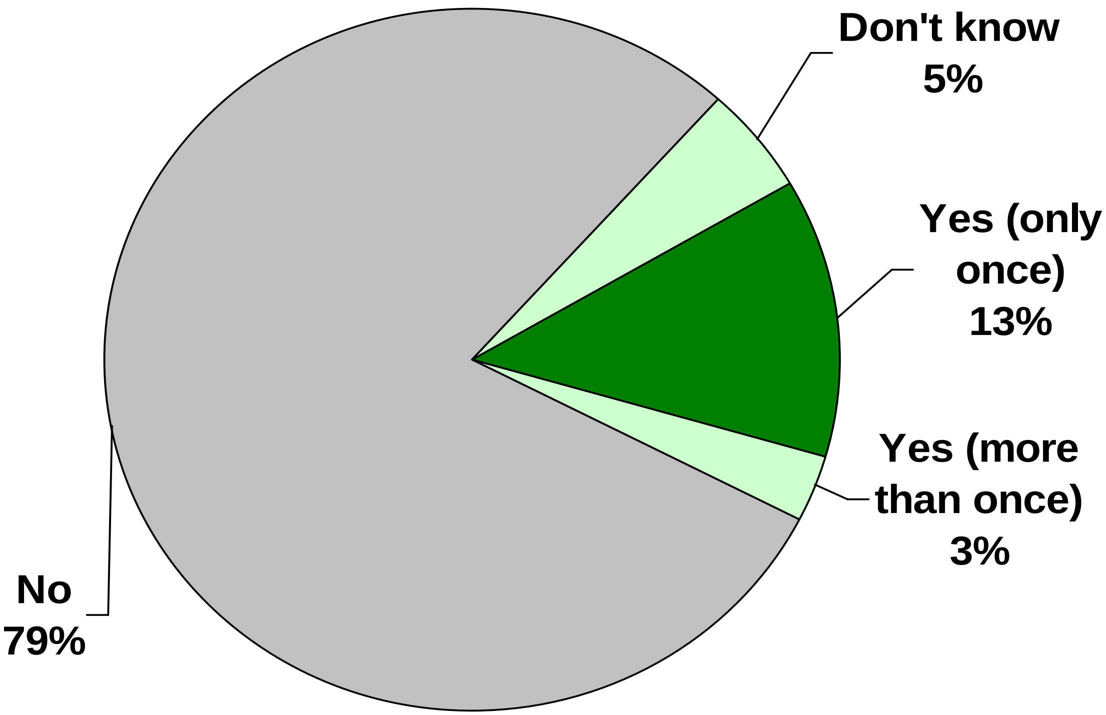
Switching Fixed Line Provider in the last 12 Months

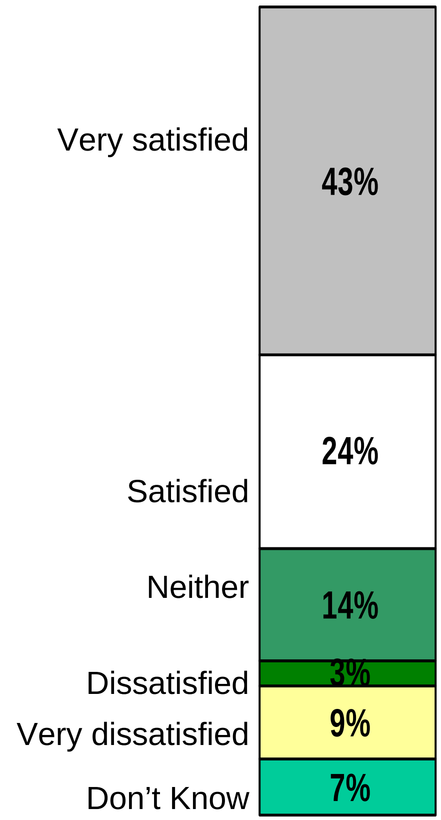
Base: Has a Fixed Line Phone N = 687

16% of fixed line users have switched at least once in the past 12 months



Q13 Have you switched your fixed line telephone provider in the last 12 months?

Degree of Satisfaction with Switching
Base N:104



Q14 How satisfied were you with the process of switching operator?

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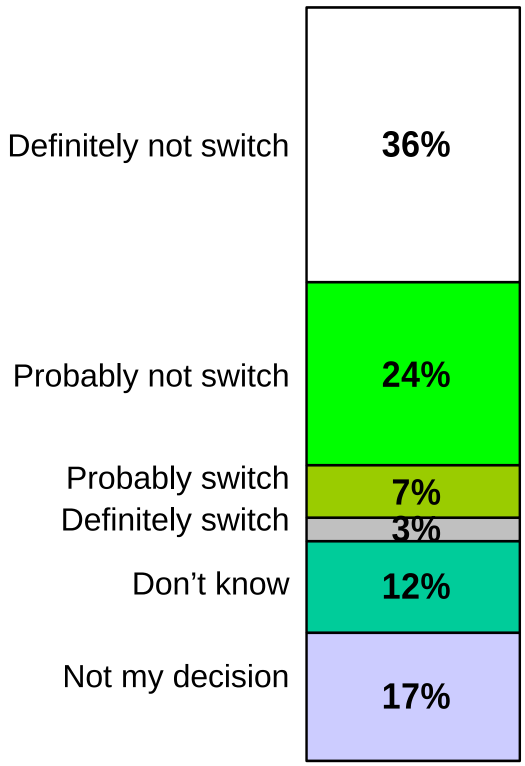
Likelihood of Switching Residential Telephone Service Provider

Base: Has a Fixed Line Phone N = 687



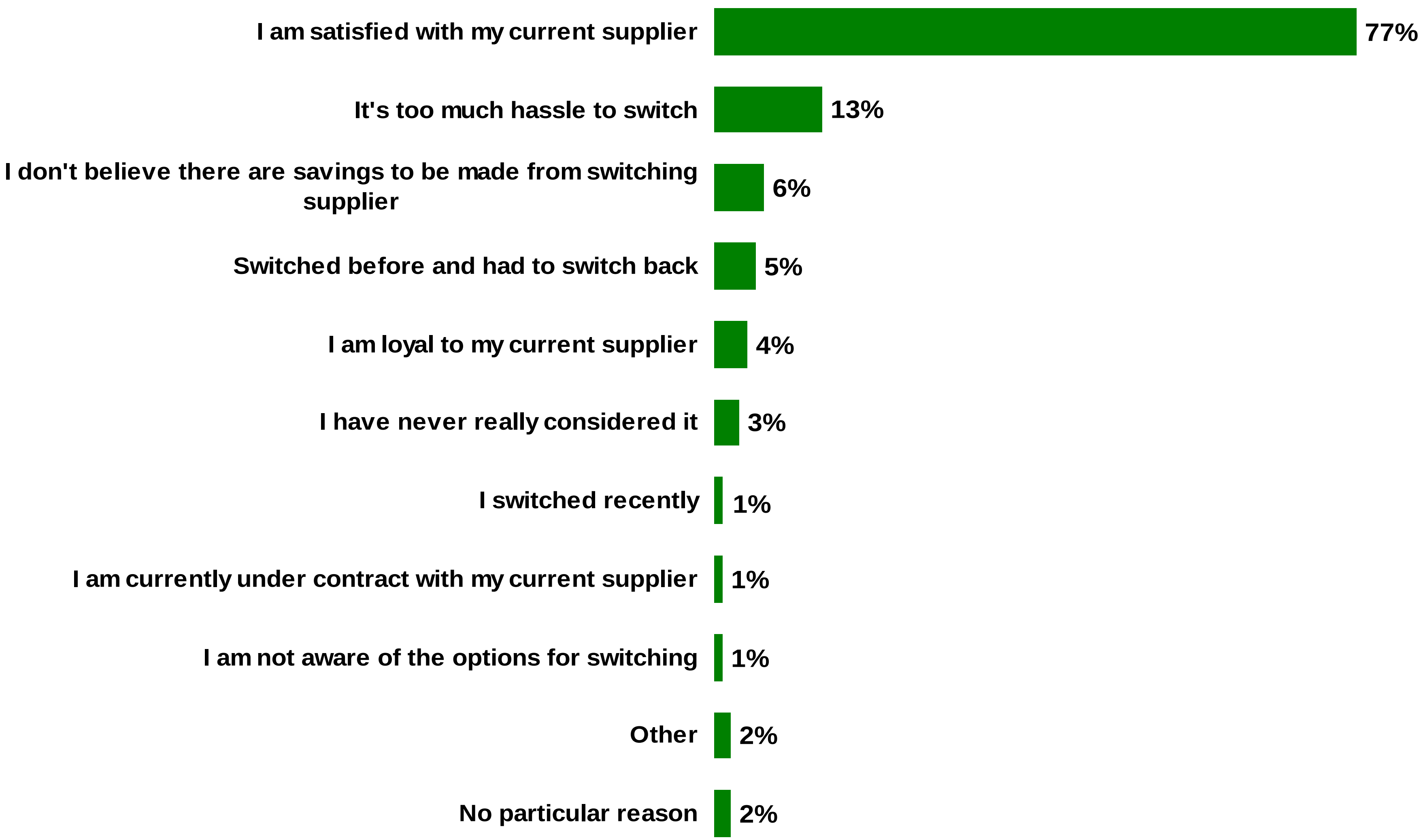
Overall, 10% of home fixed line users are likely to switch telephone service providers in the next three months.

The findings highlighted repeat switching, with 19% of individuals who have switched once already likely to switch again, while a significant 32% of individuals who have previously switched more than once are likely to do so in the near future.

Q15 How likely would you say it is that you will** switch **to another residential telephone service provider in the next three months if you think you can get a better deal from them than the one you have at present?

Reasons for Not Switching Fixed Line Operator

Base: Has a Fixed Line Phone, will not switch to another Residential Telephone Service Provider in the Next Three Months N = 419



Q16 What are your main reasons for not switching fixed line operator?

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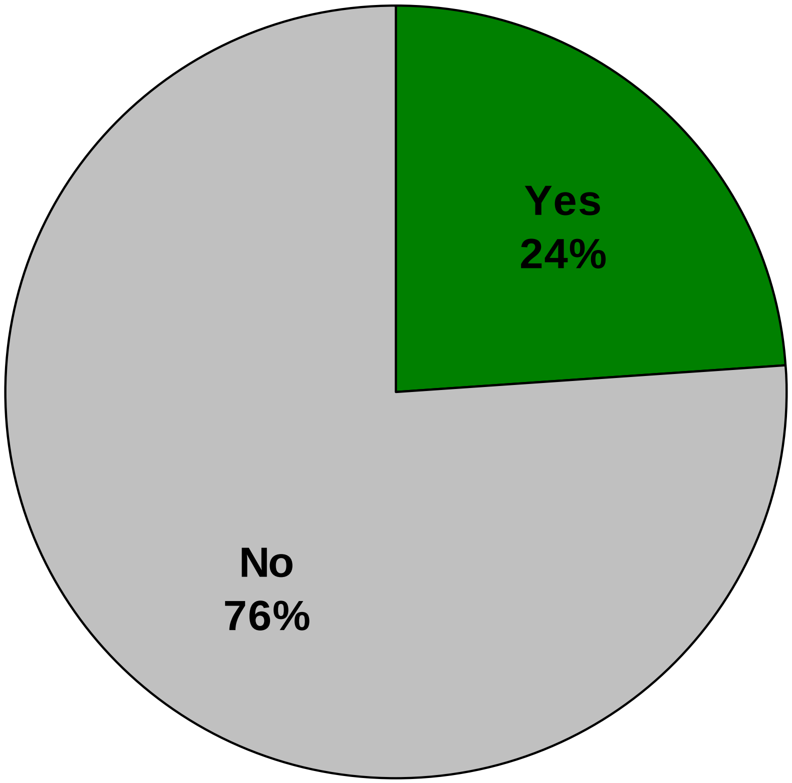
Awareness of Fixed-Line Operator's Code of Practice for Complaint Handling

Base: Has a Fixed Line Phone N = 687



Percentage who said Yes:

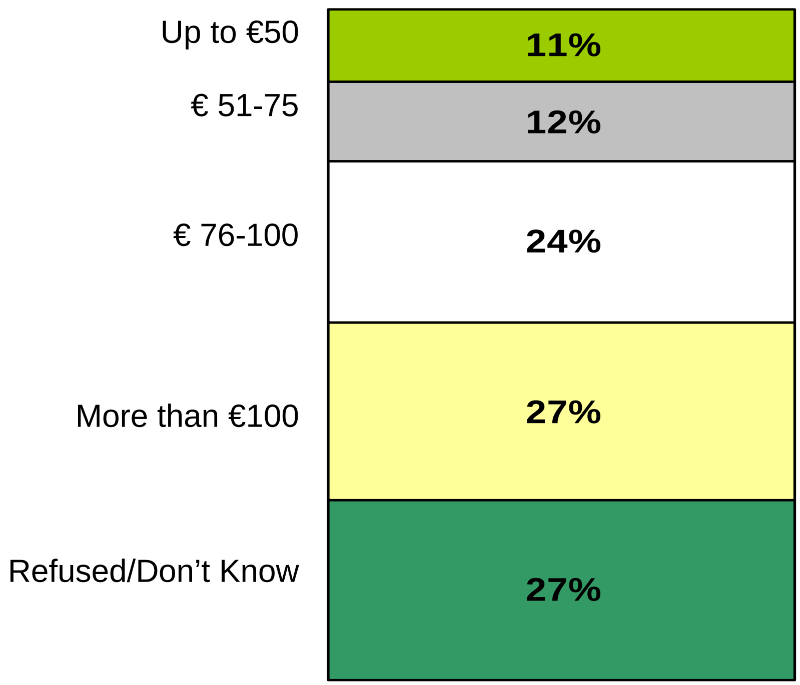
Age	
15-24	**14%**
25-44	**30%**
45-64	**26%**
65-74	**18%**

Consumer awareness levels of the fixed-line operator's Code of Practice for complaint handling has increased from Q2 2005, up 4% to 24%. The survey findings revealed that higher awareness levels were prevalent among likely bill payers (25-44 and 45-63 age groups).

Q17 Are you aware of your fixed-line operator's Code of Practice for complaint handling?

Bi Monthly Average Spend on Telephone

Base: Has a Fixed Line Phone N = 687



Groups with above average spend include:

Married	€104.39
Those working	€106.90
Those who run a business from home	€113.85
Those with home Internet access	€115.51

Groups with below average spend include:

65-74 years	€71.41
Lower income groups	€87.98
Those in rented accommodation	€81.57

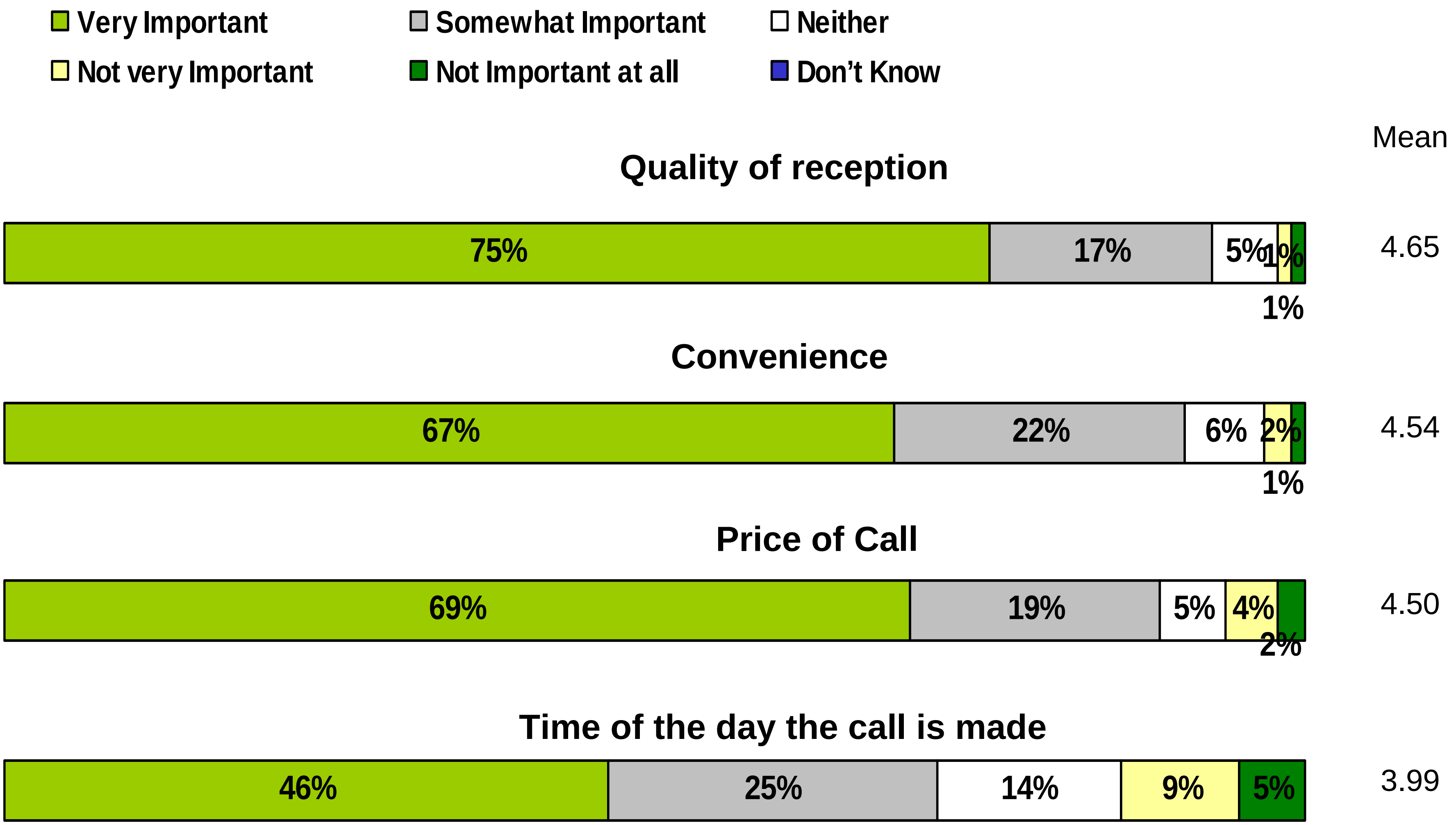
Bi-Monthly Average spend (excl dk) **€ 99.61**

Reported average bi-monthly spend decreased by 4% since Q3 from €103.57 to €99.61 in Q4.

Q18 How much, approximately, was your last bi-monthly telephone bill from your telephone service provider(s) mentioned at Q.5) including VAT?

Usage of Fixed or Mobile for Calls in the Home

Base: Has a Fixed Line Phone N = 687



Q19 When making a voice call, how important are the following factors that I am going to read out in determining whether to use a fixed line or a mobile telephone?

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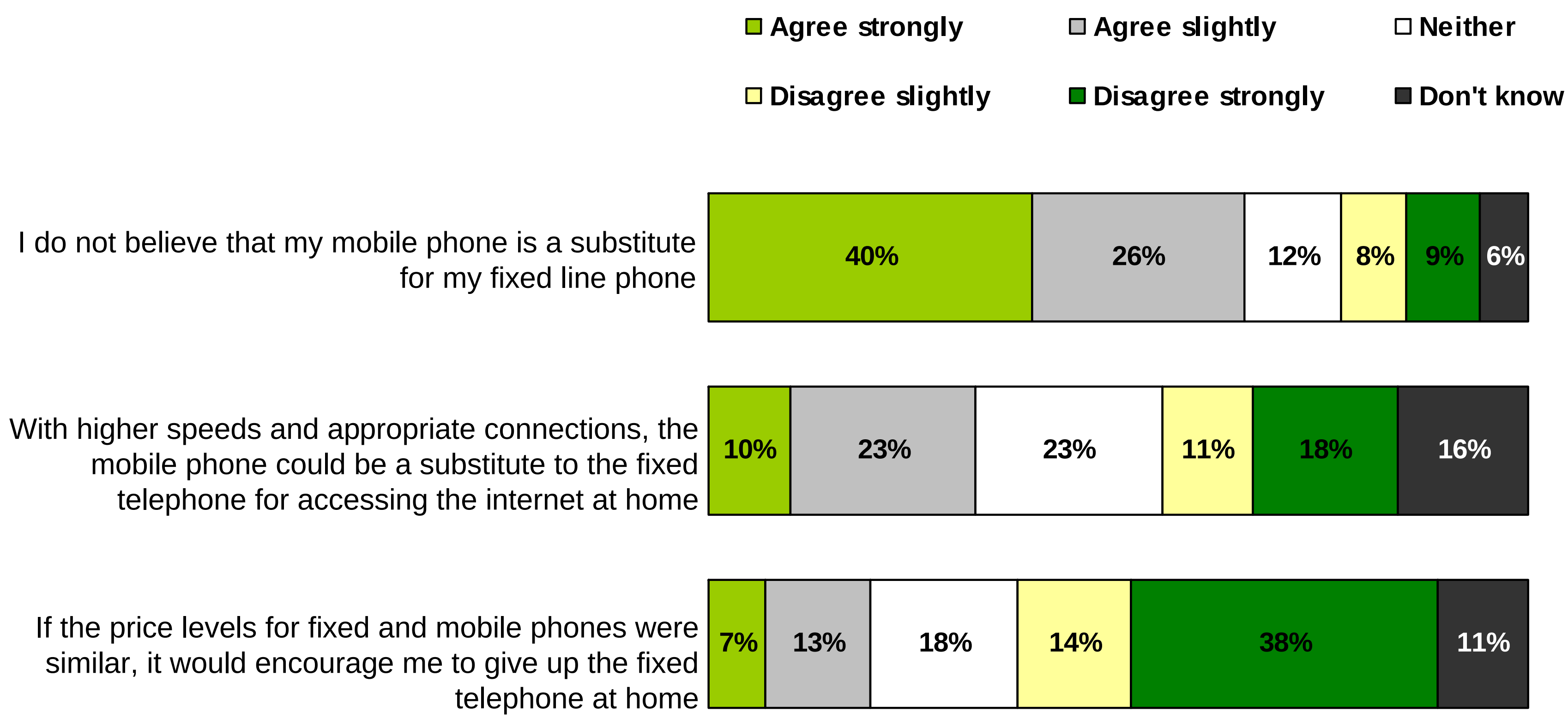
Choosing Between and Fixed and Mobile Phone

Base: Has a Fixed Line Phone N = 687



Q20 I will now read you a list of statements about fixed-line communication services. Can you tell me to what extent you agree or disagree with each, using a scale from 1 to 5, where 1 means you Agree Strongly ad 5 means you Disagree Strongly

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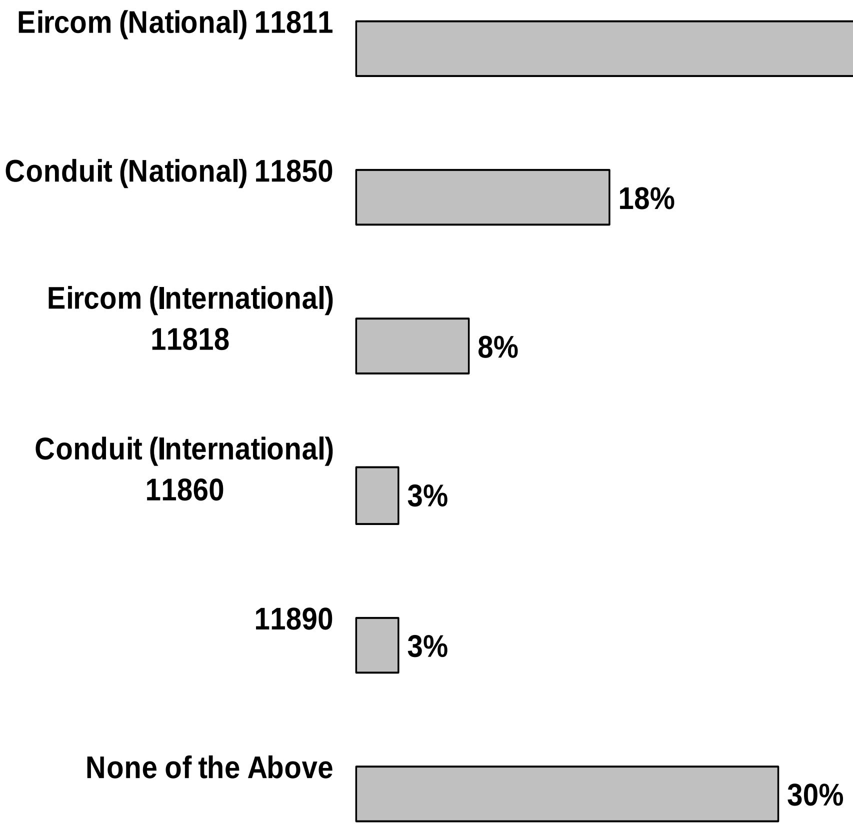
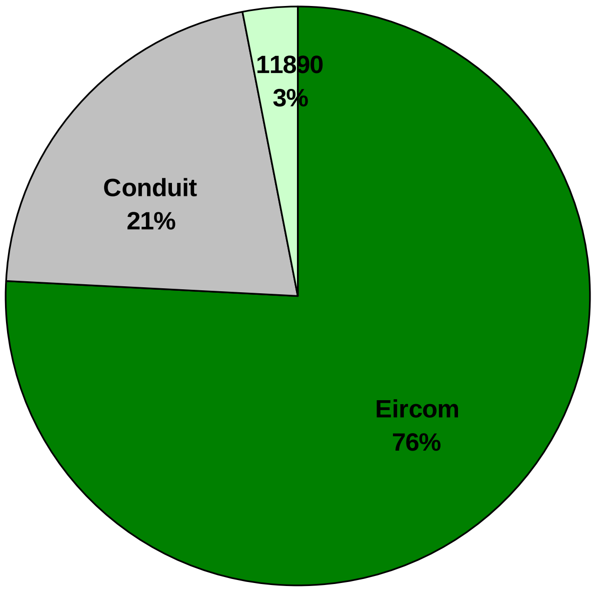
Usage of Directory Enquiry Services

Base: Has a Fixed Line Phone N = 687



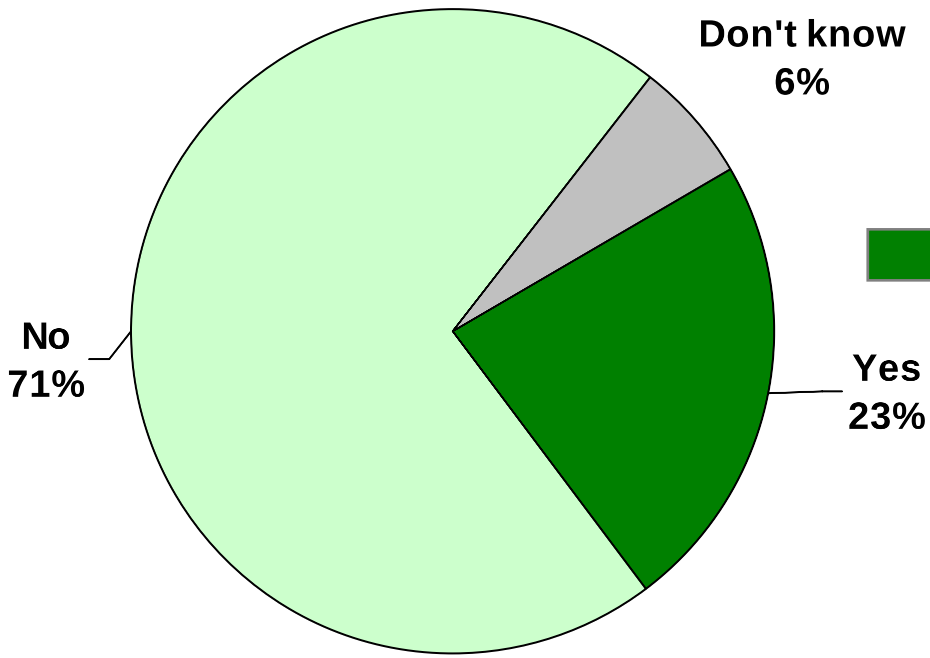


Those who have not used directory enquiry services were mainly individuals aged 15-24 years and students. eircom remain the largest directory enquiry service with almost 8 in 10 of individuals who use directory enquiry services using eircom directory enquiry services.

Q21 Have you ever used any of the following Directory Enquiries services?

Directory Enquiry Service – Dropped/Incomplete Call

Base: Has a Fixed Line Phone, Has Used Directory Enquiry Services N = 479



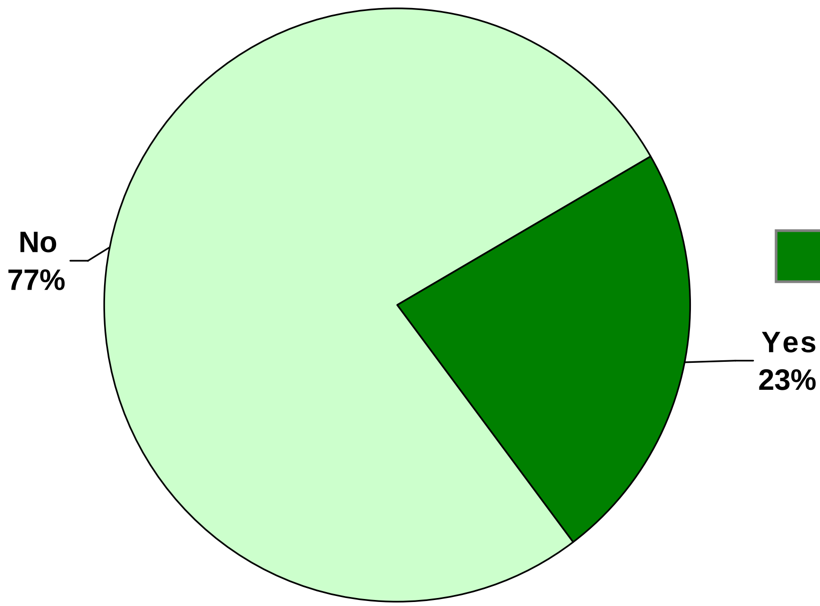
Region	
Dublin	15%
ROL	16%
Munster	35%
Conn/Ulster	22%

23% of individuals have experienced a dropped/incomplete call when using a directory enquiry service. The findings revealed that this figure may be related to mobile phone reception, with almost 4 in 10 experiencing a dropped/incomplete call in the Munster locality.

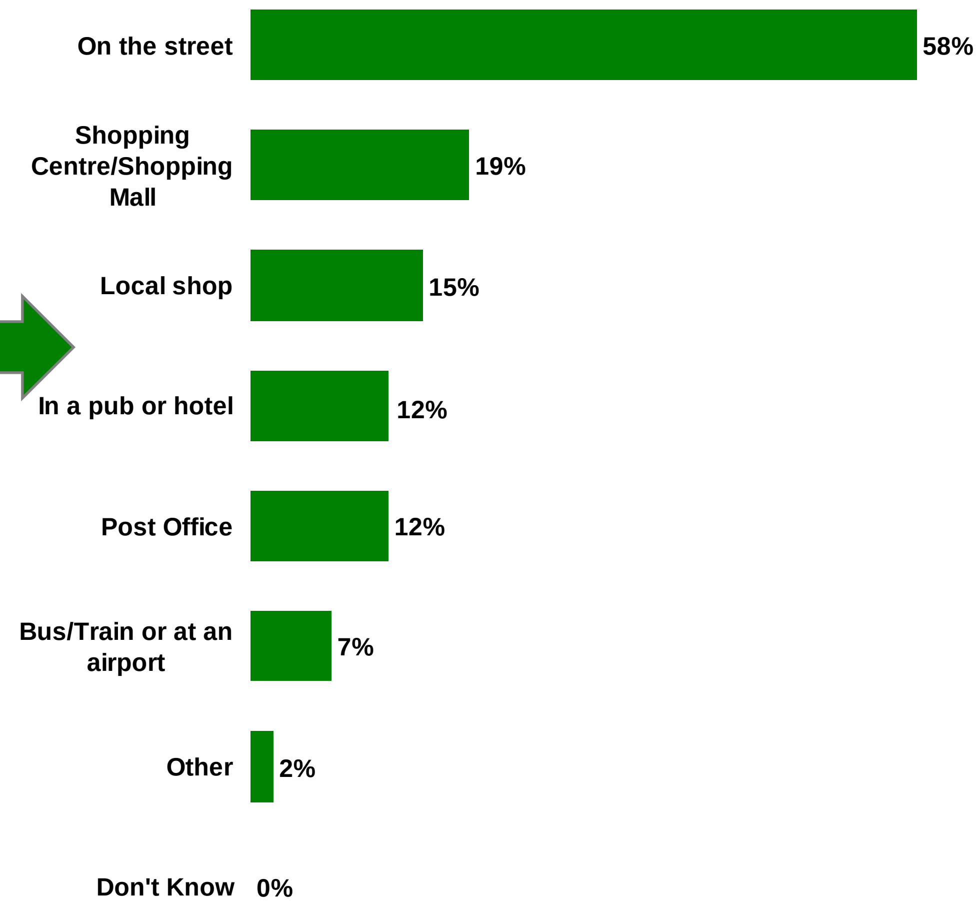
Q22 While using a directory enquiries service in Ireland, has your call ever been 'dropped' or cut off, either while your number was being sought, or while trying to complete the call?

Usage of Payphone in the last 3 Months

Base: All Respondents N = 1001



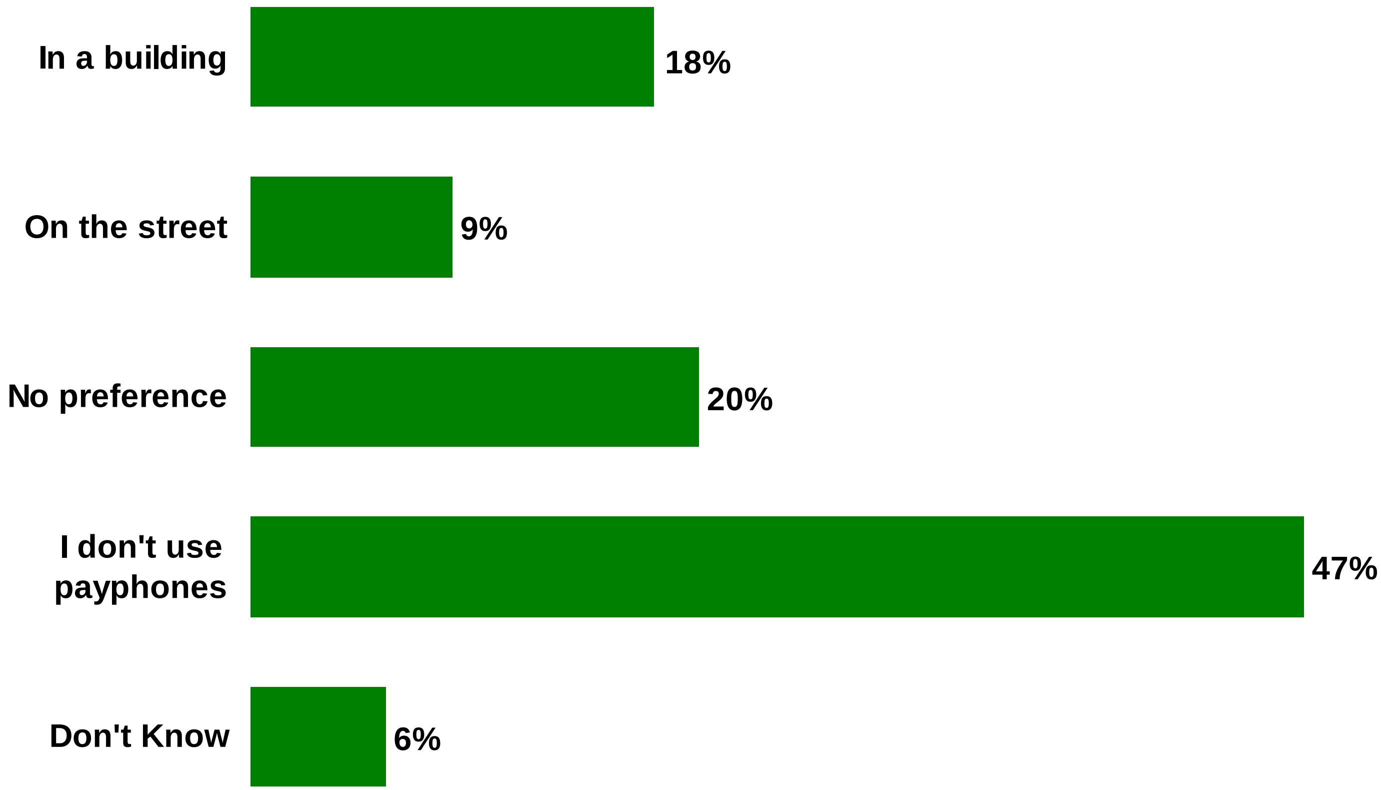
Location of Payphones, Base: Has used a payphone in Ireland in the last three months N=238



Q24 Have you used a payphone in Ireland in the last 3 months?
Q25 Where was the payphone(s) you used located?

Payphone Preferences - Location

Base: All Respondents N = 1001



The findings remain consistent with those reported in 2005, with the same percentage of individuals not using payphones (47%). Individuals preferences have slightly changed however since 2005, with a decrease in the percentage of individuals who have no preference for payphone location (down 7% from Q4, 2005 to 20% this wave).

Q26 When choosing to use a payphone, do you prefer to use one located on the street, or in a building such as a shopping centre or hotel lobby?

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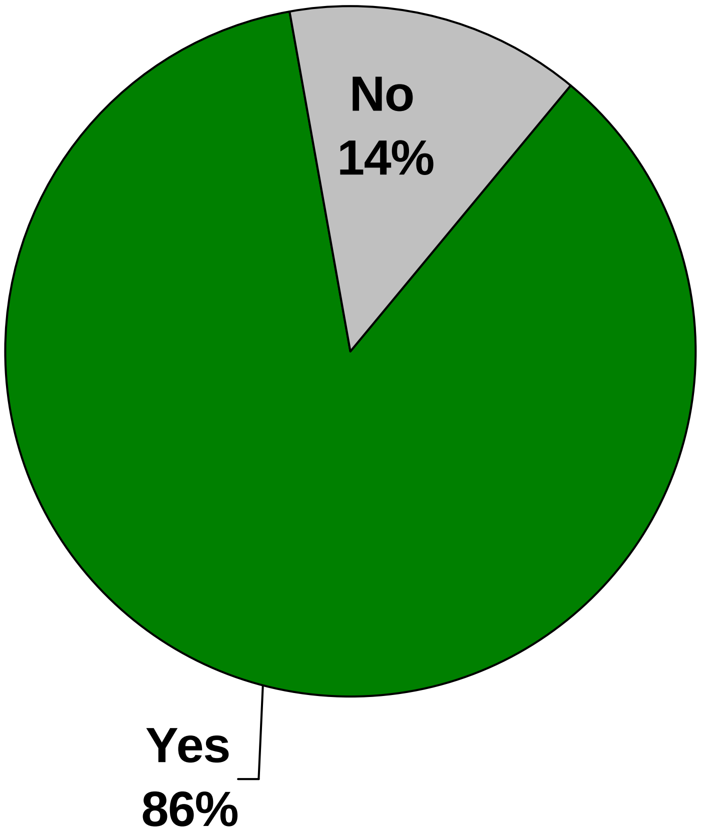
Mobile Phone Usage

Key Findings

- Vodafone and O2 remain the largest mobile suppliers in Ireland, with 48% and 37% market share respectively.
- 8% of individuals switched mobile operator in the last 12 months. Unlikely switching activity in the fixed line sector, results indicate that repeat switching is minimal in the mobile sector, with only 1% of individuals having switched mobile provider more than once. Of those who did switch providers however, the majority of them (69%) retained their old mobile number.
- As in previous waves, the majority of individuals used prepaid cards to top up their mobile (78%). Not surprisingly, those aged 15-24, 65-74, and students were the most likely to use this payment method.
- Average monthly mobile spend has increased from previous waves to €55.91.

Mobile Phone Ownership

Base: All Respondents N = 1001



Percentage who said Yes:

Gender	
Male	88%
Female	84%
Age	
15-24	94%
25-44	94%
45-64	82%
65-74	48%
Region	
Dublin	85%
ROL	91%
Munster	87%
Conn/Ulster	80%

Q27 Do you personally have a mobile phone?

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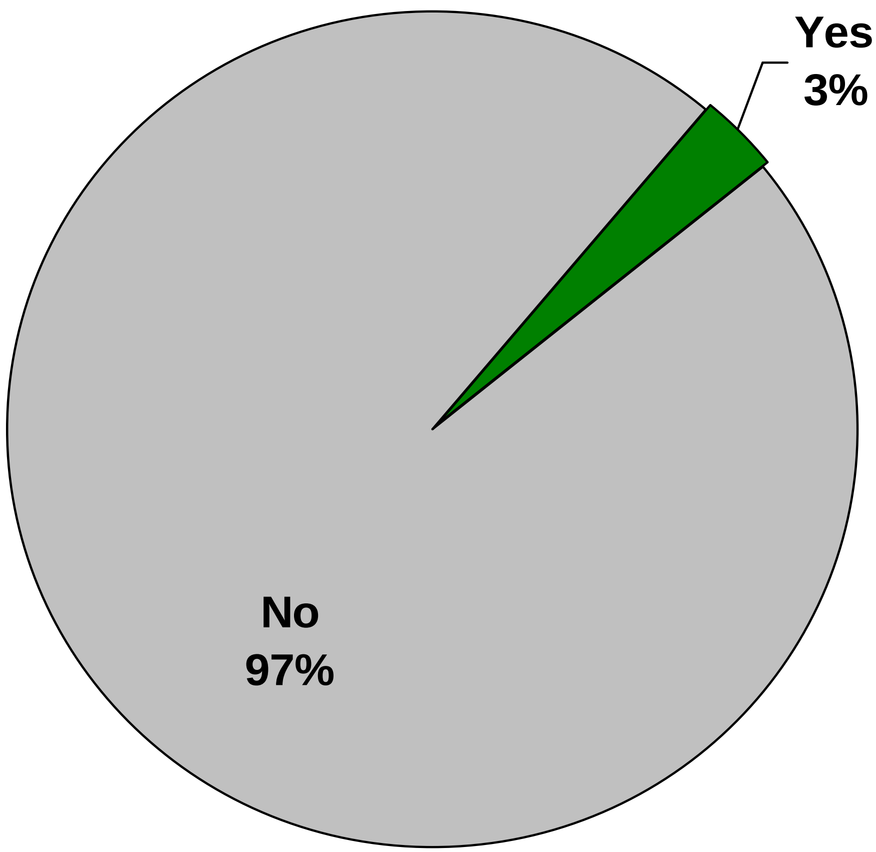
Multiple Mobile Phone Subscriptions

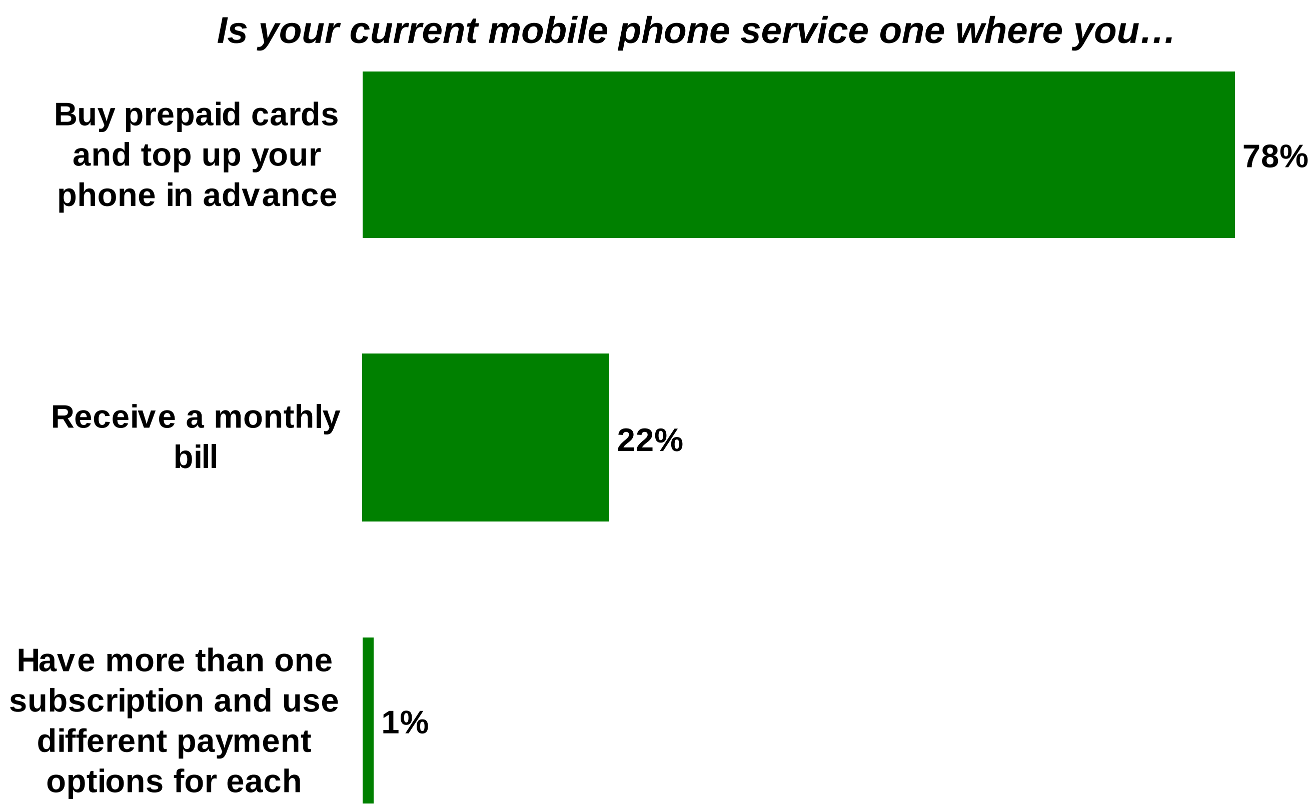
Base: Has a Mobile Phone N = 862



Q28 Do you use more than one mobile phone subscription or account, i.e. more than one number?

Current Mobile Phone Service

Base: Has a Mobile Phone N = 862

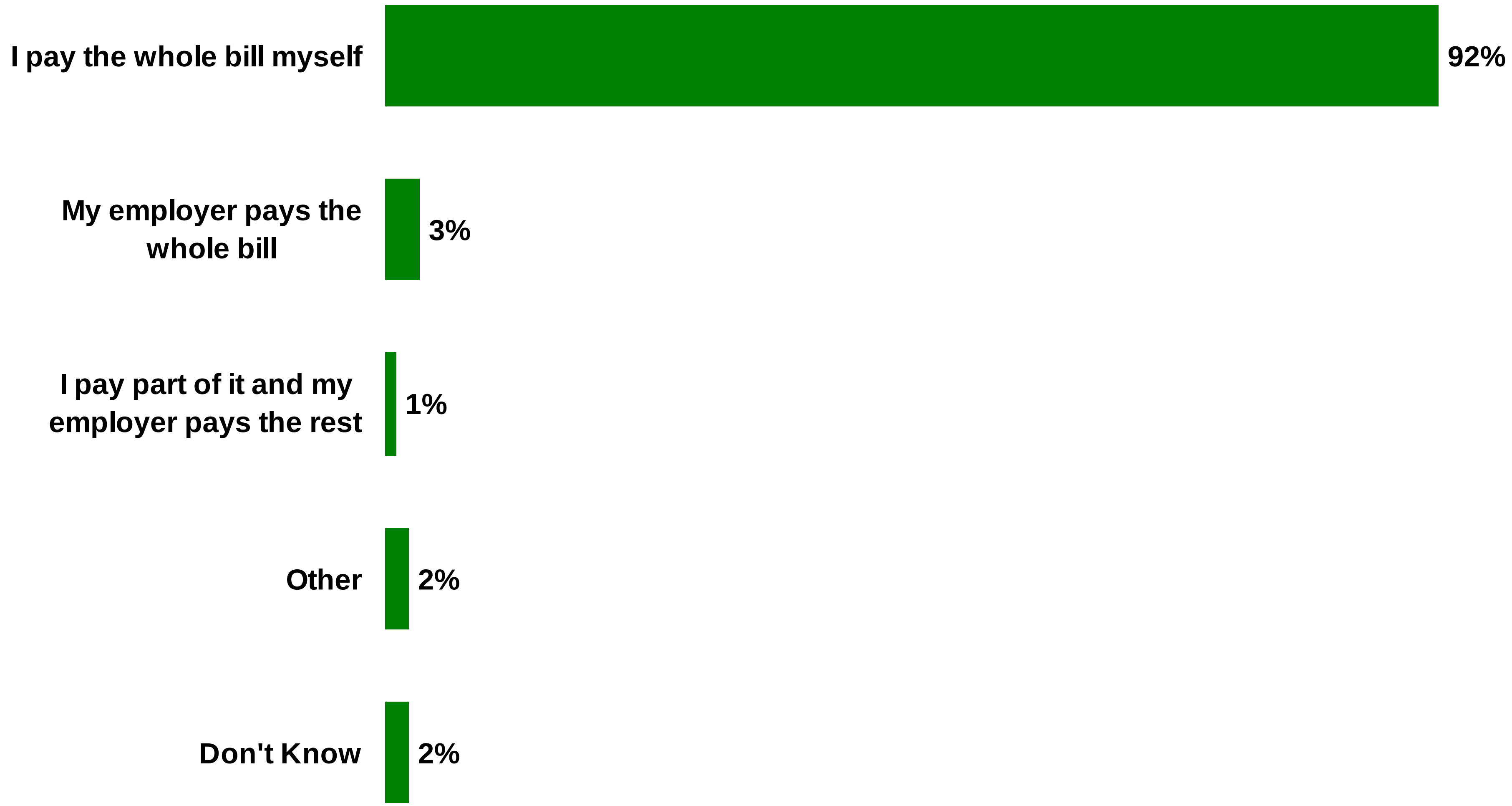


Those belonging to the 15-24 and 65-74 age groups, women and students are the most likely to buy prepaid top up cards. Individuals aged 25-44 and working are more than likely to receive a monthly bill.

Q30 Is your current mobile phone service one where you…

Payment of Mobile Phone Bill

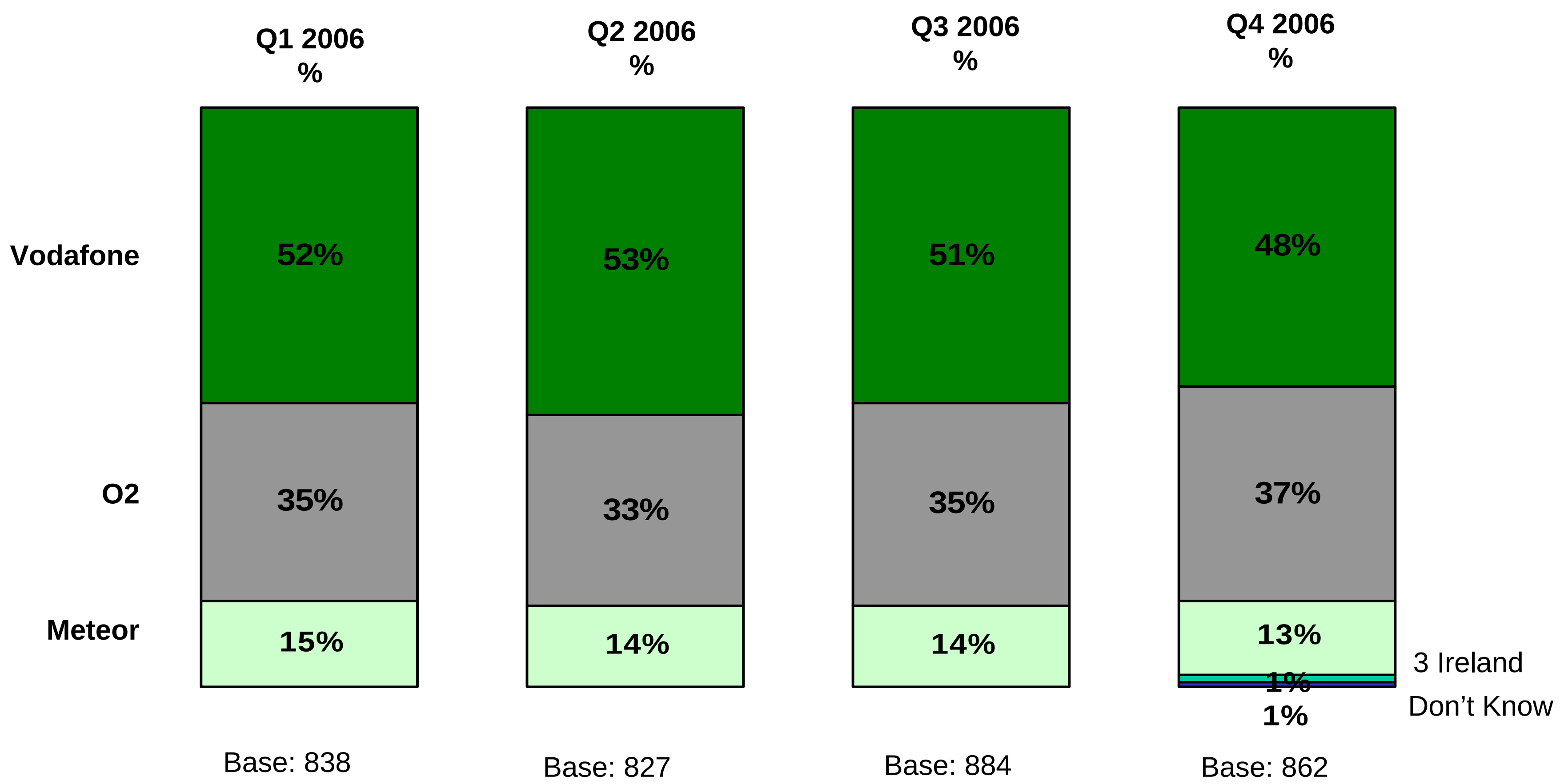
Base: Has a Mobile Phone N = 862



Q31 Who pays your mobile phone bill?

Mobile Suppliers

Base: Has a Mobile Phone N = 862



Q32 Who is (are) your mobile phone supplier(s)?

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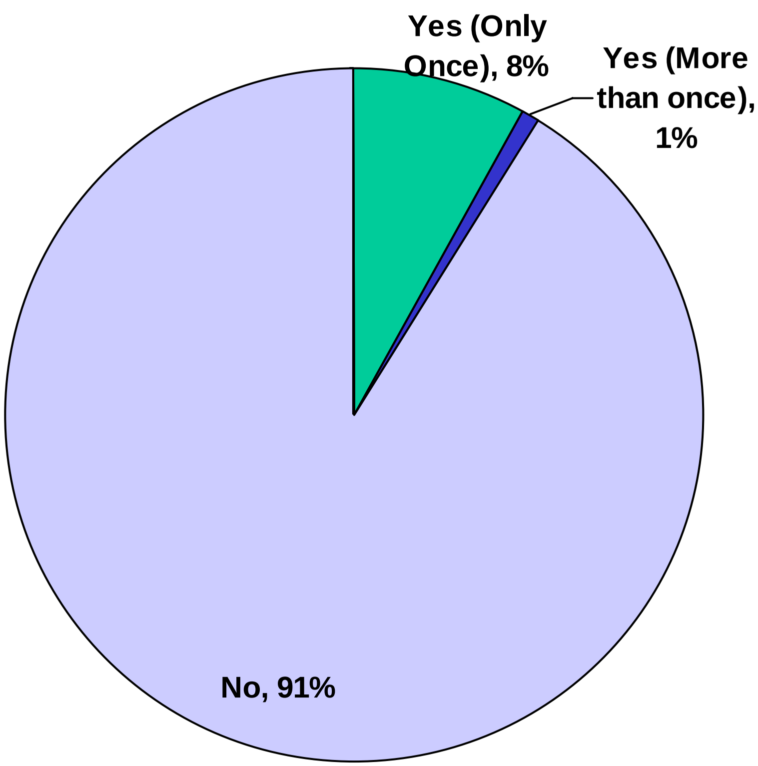
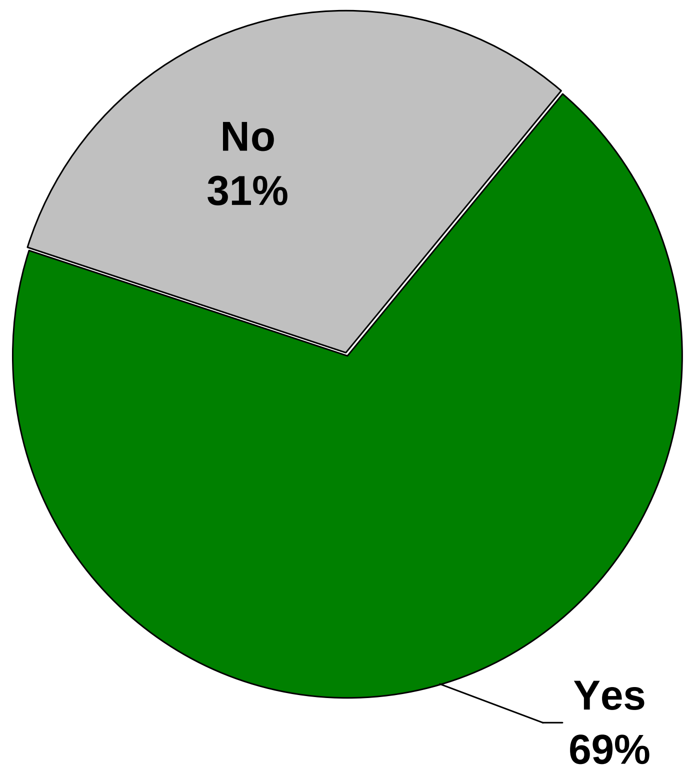
Switched Mobile Phone Suppliers

Base: Has a Mobile Phone N = 862



% Kept Mobile Number after Switch

Base N = 79



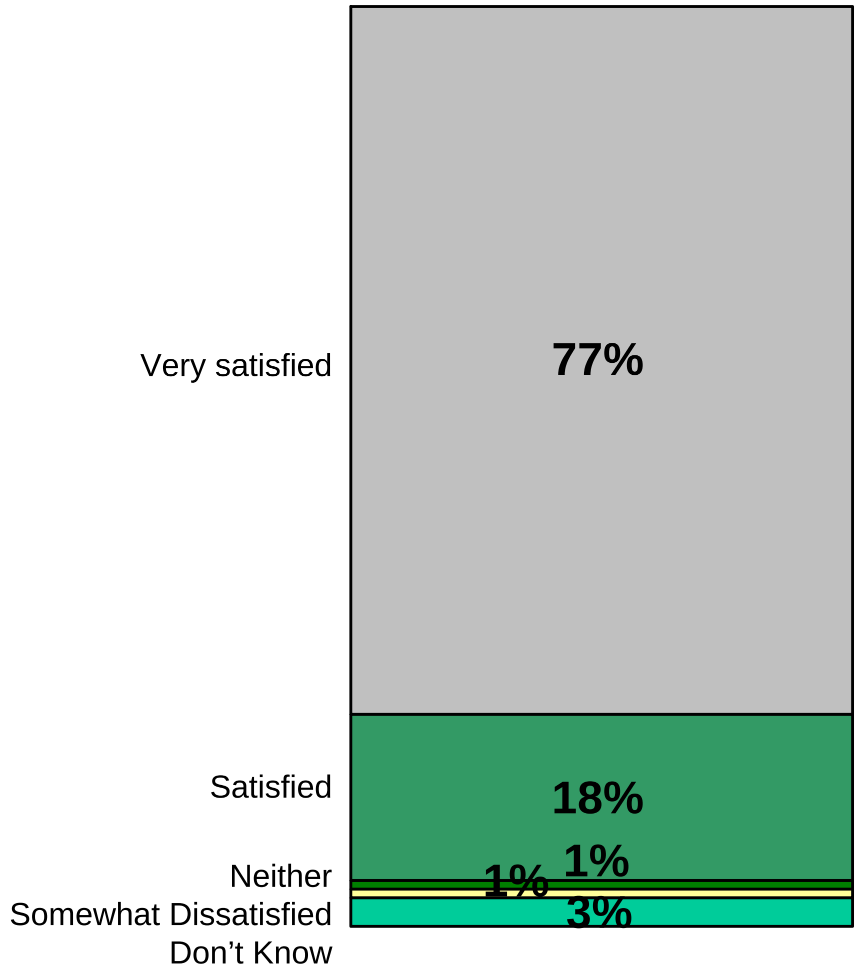
3 in 10 individuals do not keep their number after switching mobile phone suppliers.

Q33 Have you switched mobile phone supplier in the last 12 months?

Q34 Did you keep your mobile phone number when you switched operator?

Satisfaction with Switching Mobile Phone Operators

Base: Has Switched Mobile Phone Operator N = 79 (Note: Small Base)

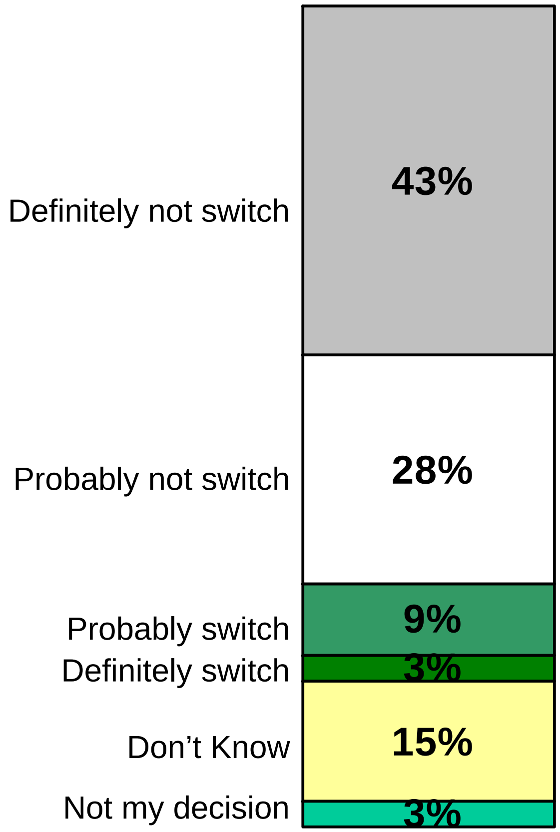


95% of individuals were satisfied with the experience of switching mobile phone operators.

Q35 How satisfied were you with the process of switching operator?

Likelihood of Switching

Base: Has a Mobile Phone N = 862

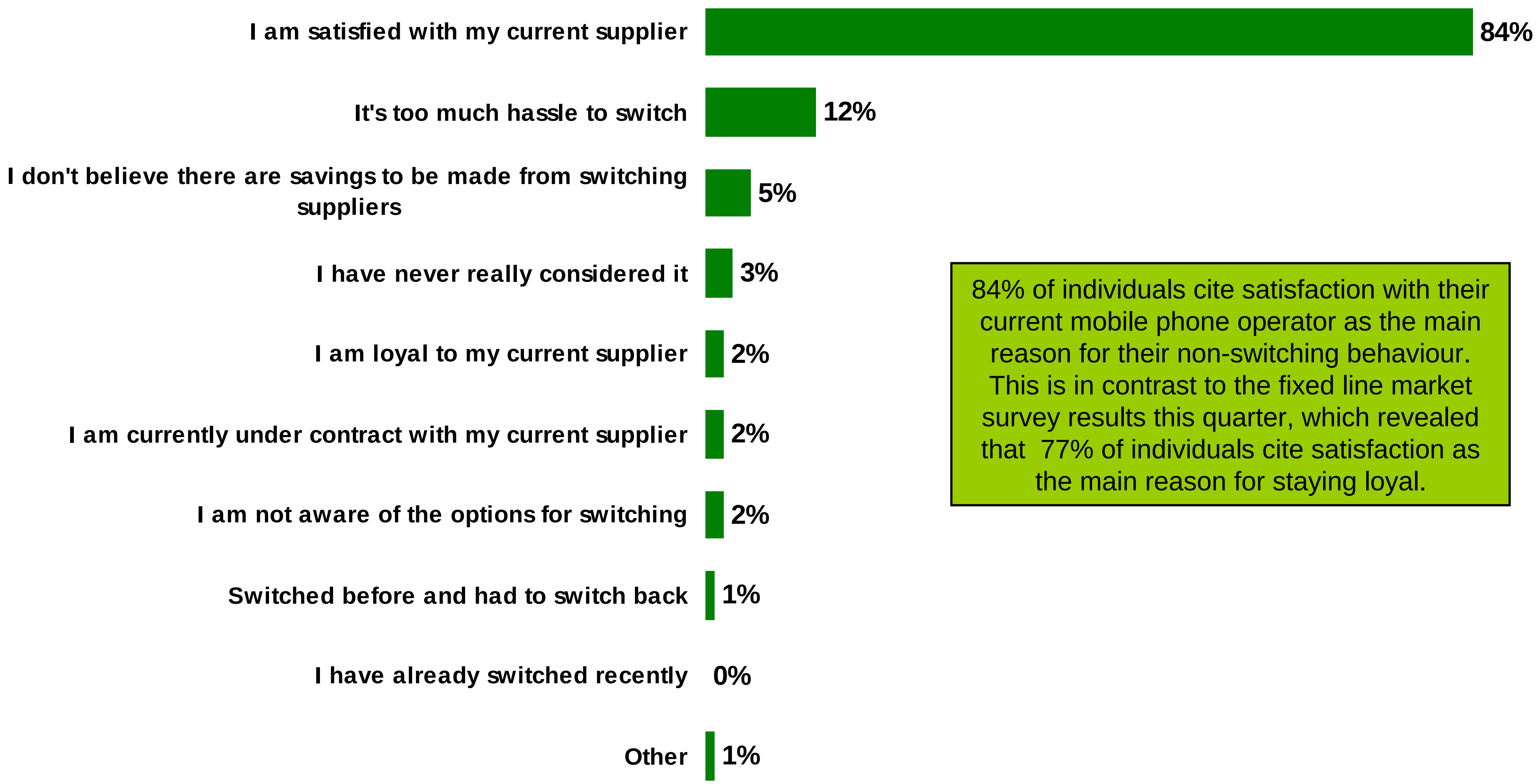


71% of mobile phone users are not likely to switch mobile phone operator in the next three months.

Q36 How likely would you say it is that you will switch to another mobile operator in the next three months if you think you can get a better deal from them than the one you have at present?

Reasons for not Switching Mobile Phone Operator

Base: Has a Mobile Phone, Unlikely to Switch Mobile Operator in Next Three Months N = 603



84% of individuals cite satisfaction with their current mobile phone operator as the main reason for their non-switching behaviour. This is in contrast to the fixed line market survey results this quarter, which revealed that 77% of individuals cite satisfaction as the main reason for staying loyal.

Q37 What are your main reasons for not switching mobile phone operator?

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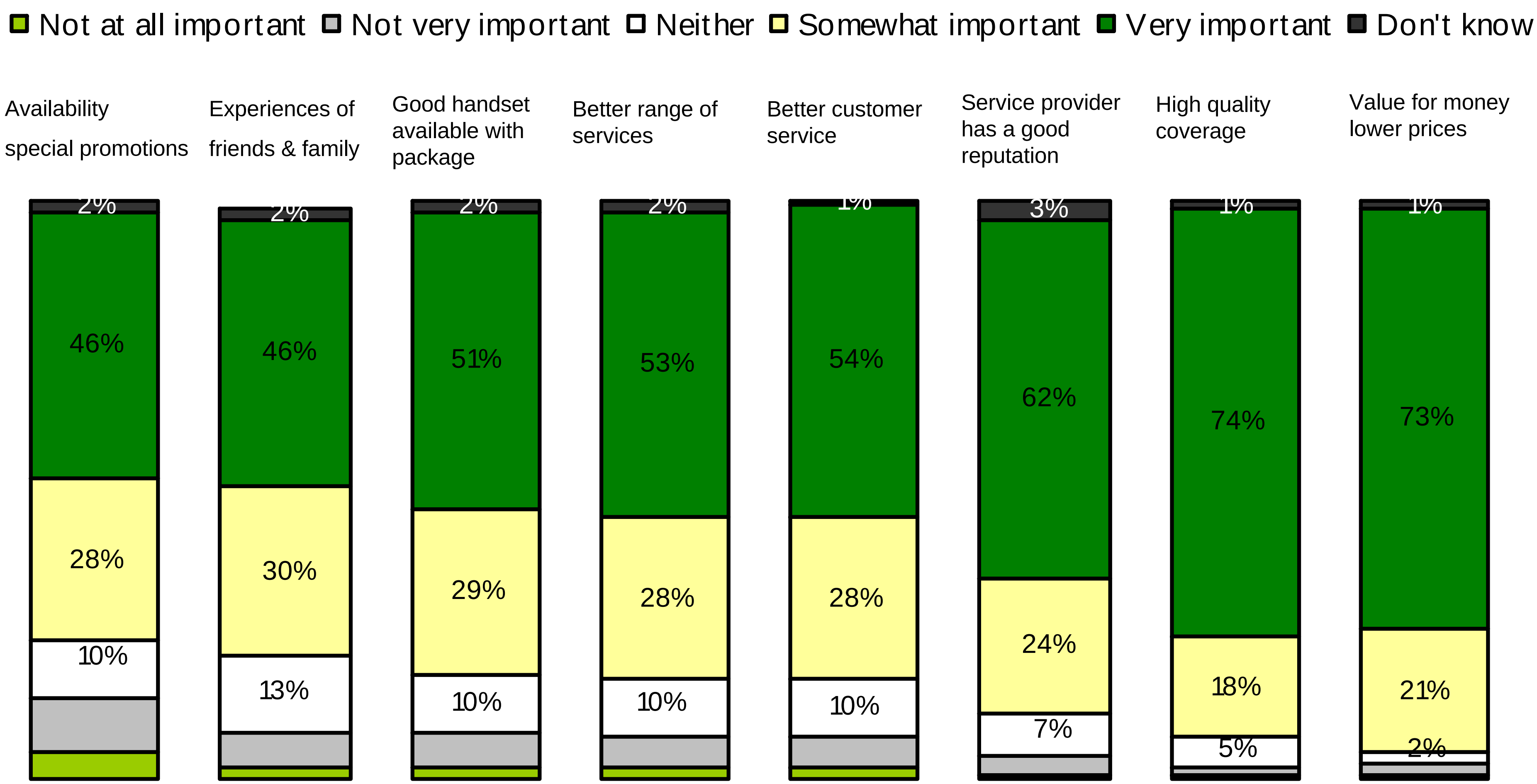
Importance of Mobile Provider Service Offerings

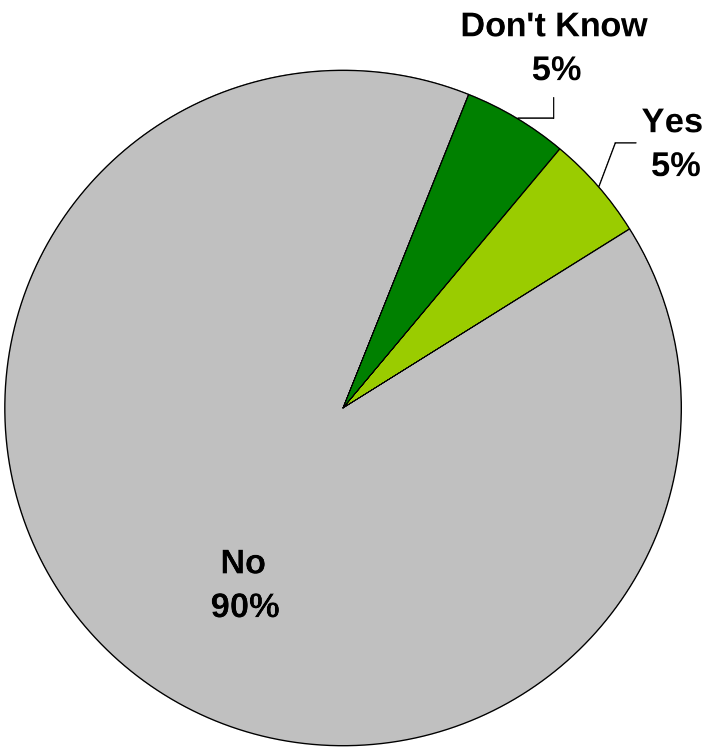
Base: Has a Mobile Phone N = 862

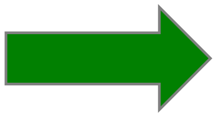


Q38 How important are each of the following factors to you when choosing a mobile service provider, using a scale of 1 to 5, where 1 is not at all important and 5 is very important?

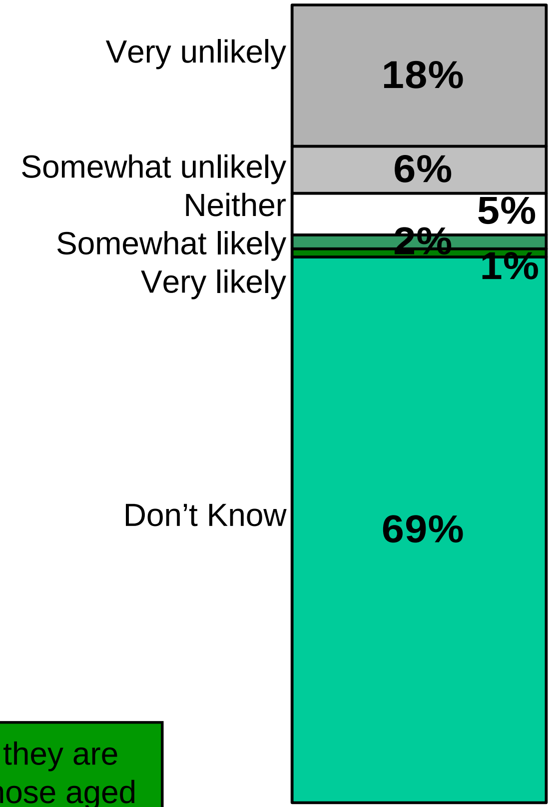
Subscription to 3G Mobile Phone Service

Base: Has a Mobile Phone N = 862





Likelihood of adopting a 3G mobile phone in the next 3 months Base: Has a Mobile Phone, Doesn't currently subscribe to 3G N=816



The majority of mobile users remain unsure of whether or not they are likely to subscribe to a 3G service in the next three months. Those aged 15-24, students are most like to adopt a 3G mobile in this time

Q39 Do you currently subscribe to a 3G (3rd – generation) mobile phone service?

Q40 How likely are you to get a 3G mobile phone in the next three months?

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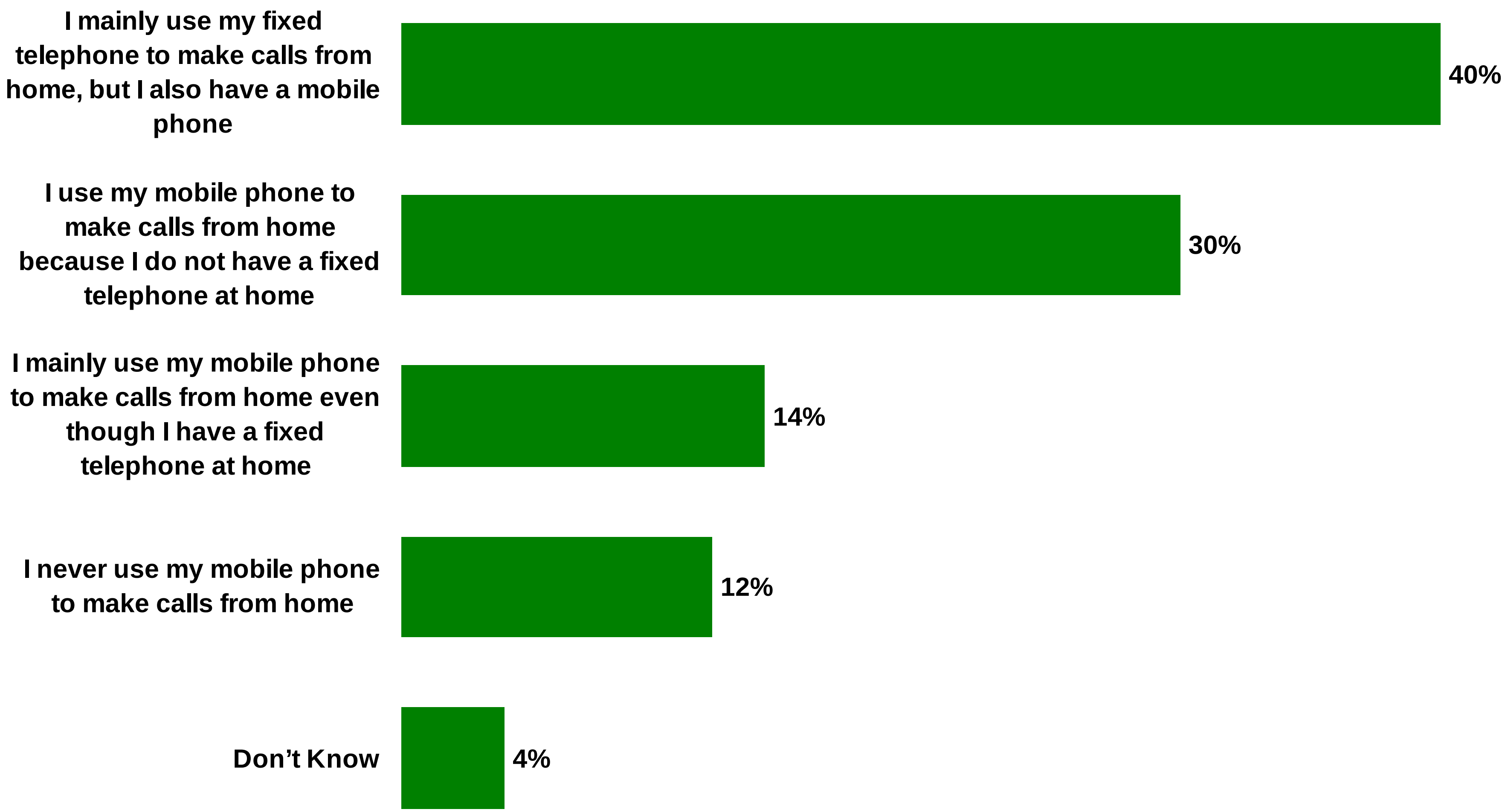
Mobile Phone Usage in the Home

Base: Has a Mobile Phone N = 862



***Q41 In terms of how you use your mobile phone** <u>at home</u>**, which of the following statements** <u>best</u> describes your current usage:?*

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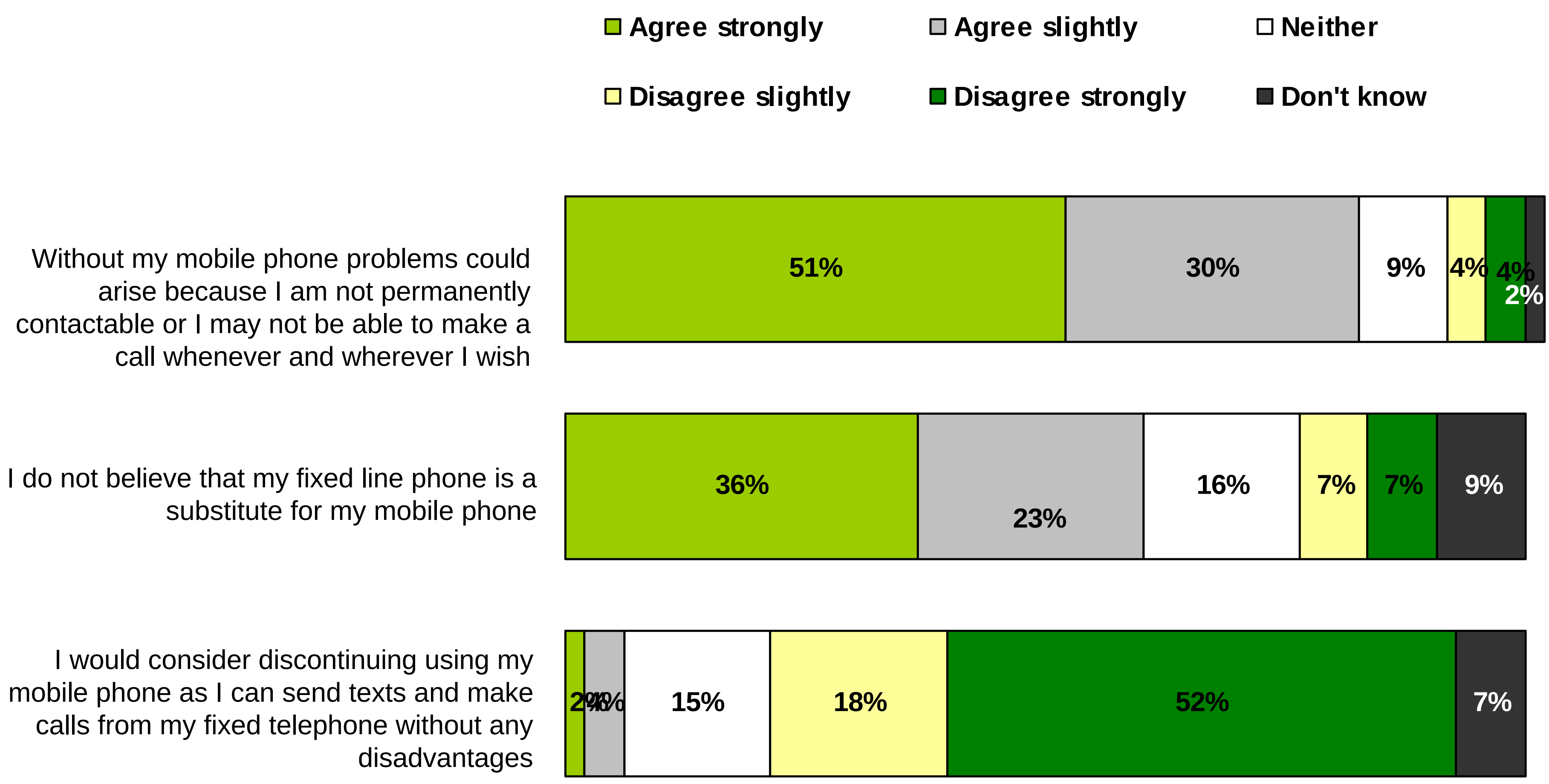
Perception with regards to mobile phone communications

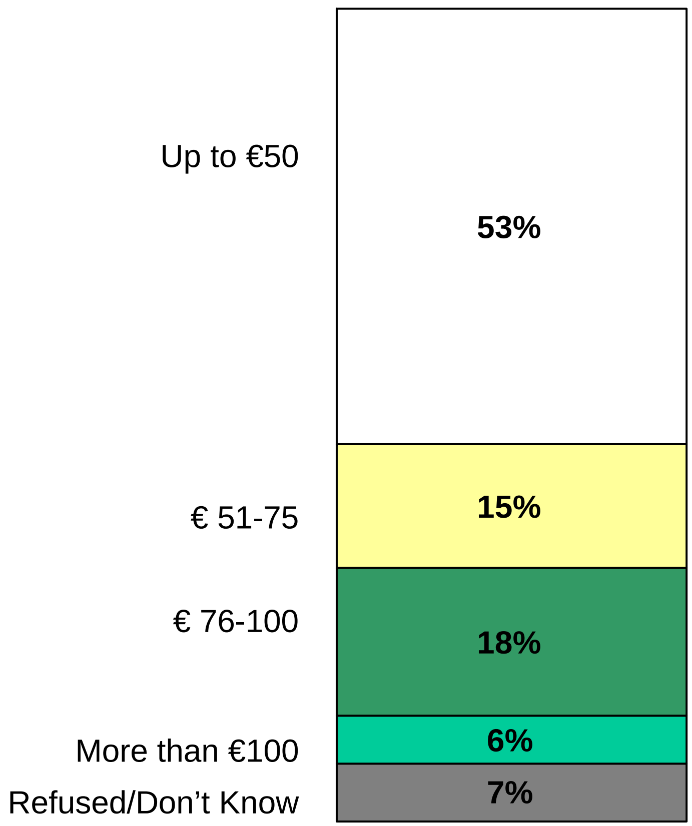
Base: Has a mobile phone N = 862



Q42 I will now read out a list of statements about MOBILE communication services. Can you tell me to what extent you agree or disagree with each, using a scale from 1 to 5, where 1 means you agree strongly and 5 means you disagrees strongly.

Monthly Average Spend on Mobile

Base: Has a Mobile Phone N = 862



€ 55.91

Average monthly spend (excl dk)

Groups with above average spend include:	
Those without a landline	**€65.66**
25-44 year olds	**€65.24**
Males	**€62.96**
Those working	**€62.44**
Groups with below average spend include:	
Females	**€48.59**
Students	**€44.34**
65-74 year olds	**€35.29**

26% of those individuals who do not have a fixed line telephone spend between €76-100 on average per month on their mobile phone.

Having a landline and a mobile phone reduces the average monthly mobile spend to €51.02

Q43 How much did you spend last month on your mobile phone?

Internet Usage

Key Findings

- 47% of respondents report using the internet in Q4 2006. Unsurprisingly, Internet usage levels are high among those aged 15-24, students, individuals working and those with home Internet access.

- The most popular Internet access point is from the home, with almost 7 in 10 individuals who use the Internet using it from this location. The workplace was the second most used Internet access point and proved popular among those aged 25-44. Internet usage correlated with the individual's life stage circumstances, with for instance schools/colleges and cyber cafes proving popular access points for those aged 15-24, who in a large number of cases were students.

- Respondents reported that non-ownership of a home PC (35%), lack of skills (31%) and expense (21%) were the leading factors in contributing to non-adoption of the Internet in the home.

- eircom continues to remain the largest Internet access provider, with almost 8 in 10 of those individuals who use the Internet at home choosing Eircom as their service provider.

- In line with previous waves, the key uses of home Internet include communication (65%), browsing (64%) and information search (58%).

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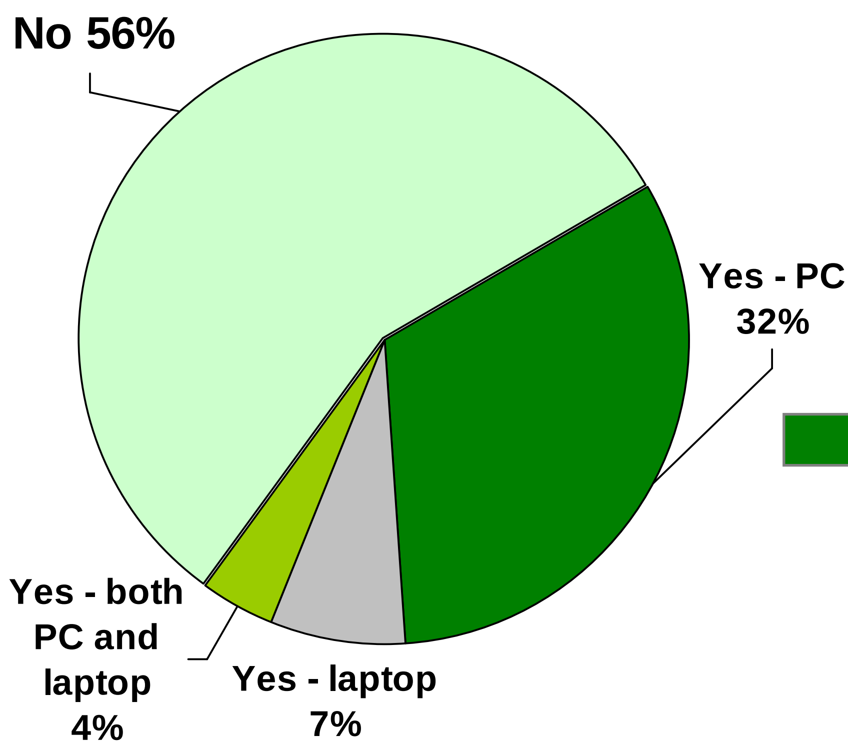
Ownership of a Personal Computer

Base: All Respondents N = 1001



Percentage who said Yes:

Gender	
Male	44%
Female	43%
Age	
15-24	54%
25-44	48%
45-64	40%
65-74	11%
Region	
Dublin	40%
ROL	40%
Munster	48%
Conn/Ulster	46%

Those most likely to own both a PC and a lap-top are those who run a business from their own home.

Q44 Do you have a Personal Computer (PC) in your house, including laptops that you usually have at home?

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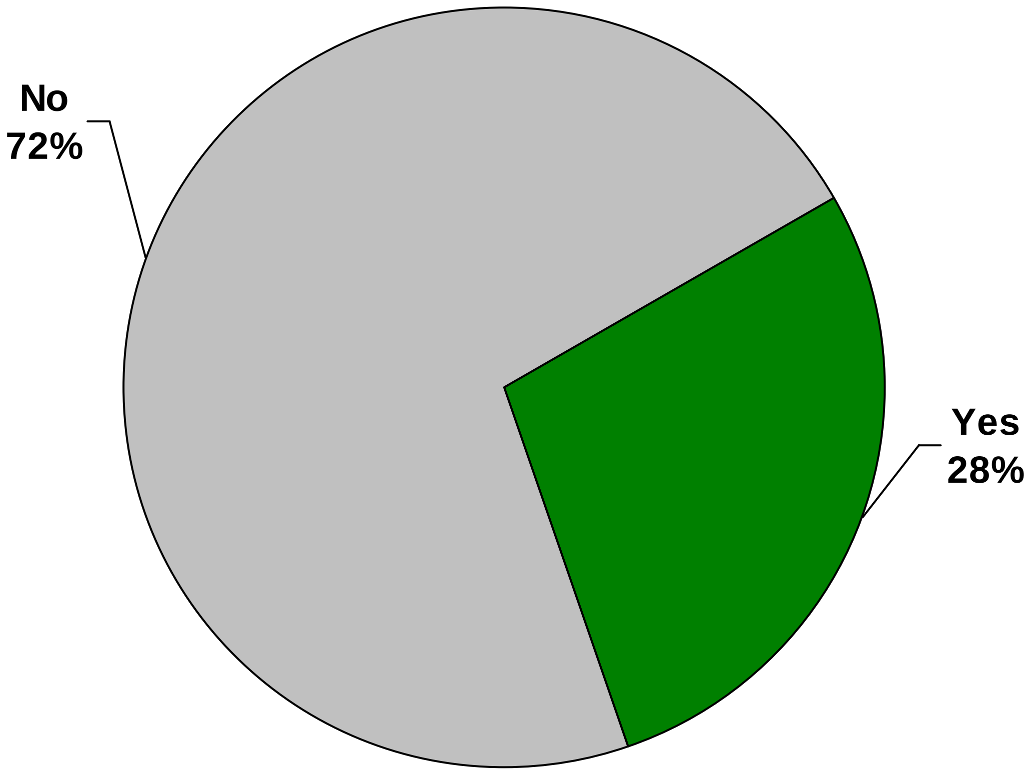
Purchase of PC/Laptop in Last 12 Months

Base: Has Personal Computer at Home N: 428



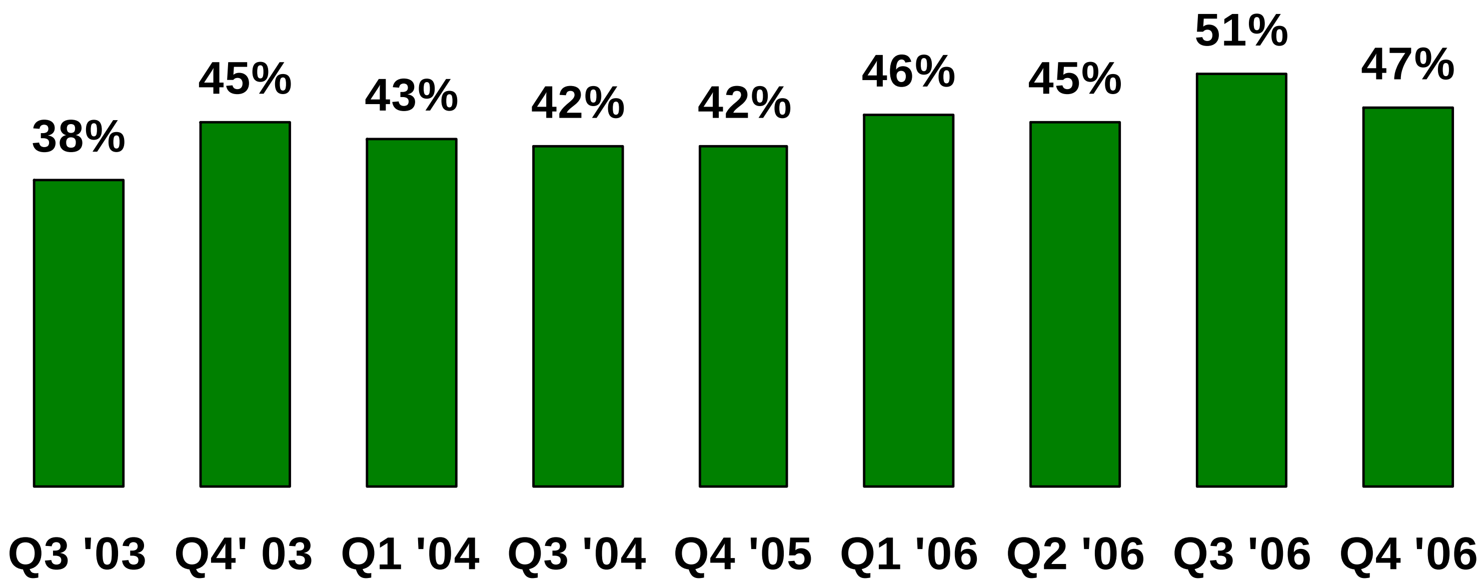
Those aged 15-24 and 25-44 were more likely to have purchased a PC/Laptop in the last 12 months.

Those in either full-time, part-time or self-employment and students were the more likely to have made a recent purchase of a PC of lap top.

Q45 Have you purchased this home personal computer (PC) or laptop in the last 12 months?

Internet Usage from any Location

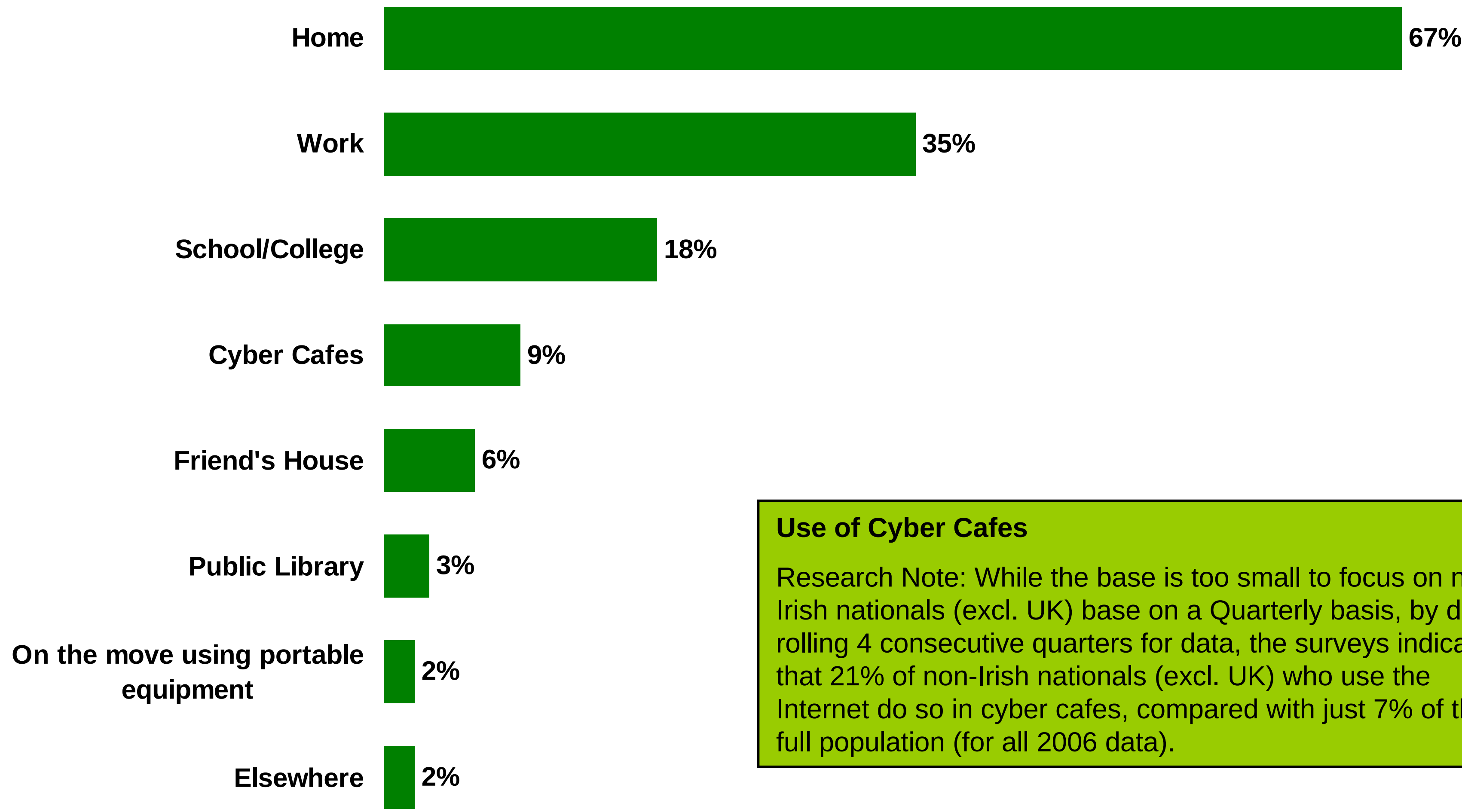
Base: All Respondents N = 1001



Q46 Do you personally use the internet from any location?

Main Internet Usage Locations

Base: Uses the Internet N = 458



Use of Cyber Cafes

Research Note: While the base is too small to focus on non-Irish nationals (excl. UK) base on a Quarterly basis, by data rolling 4 consecutive quarters for data, the surveys indicate that 21% of non-Irish nationals (excl. UK) who use the Internet do so in cyber cafes, compared with just 7% of the full population (for all 2006 data).

Q47 From which of the following locations do you use the internet?

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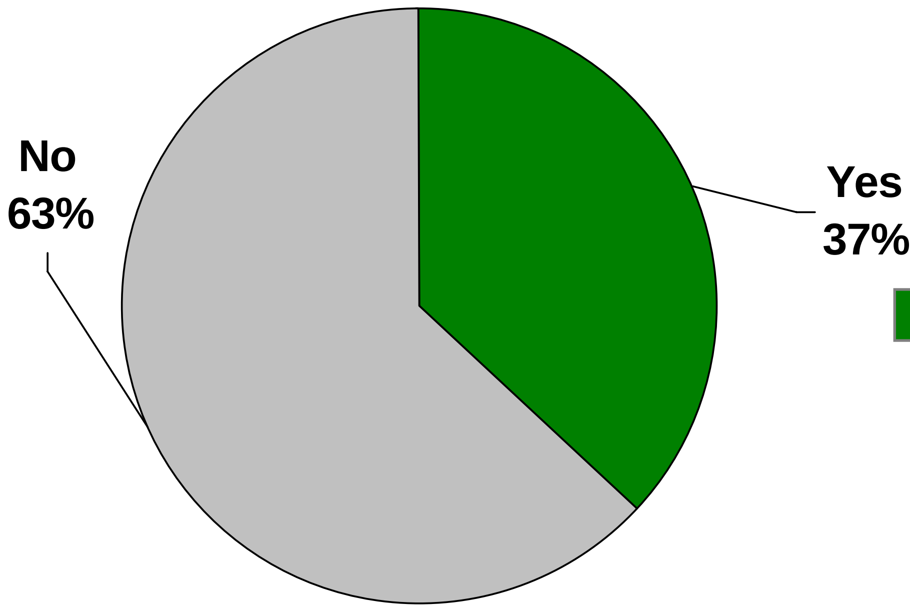
Home Internet Connections

Base: All Respondents N = 1001



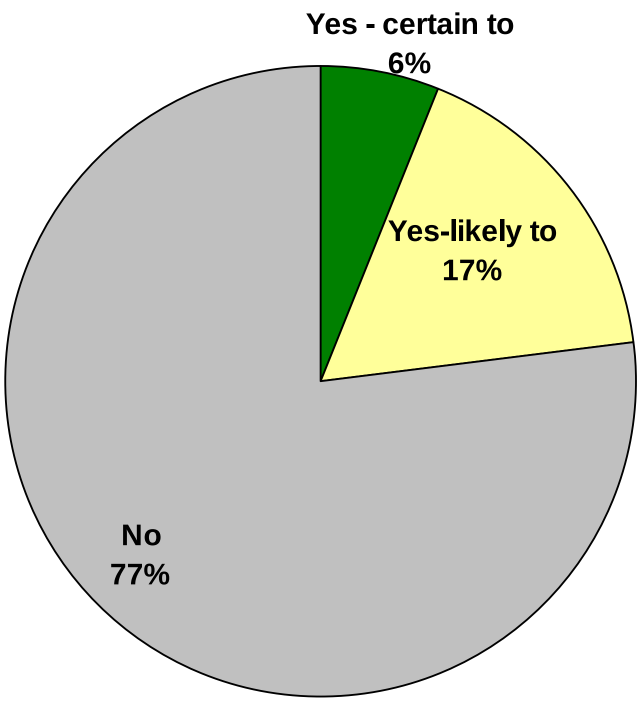
Percentage who said Yes:

Gender	
Male	39%
Female	35%
Age	
15-24	44%
25-44	40%
45-64	36%
65-74	6%
Region	
Dublin	36%
ROL	33%
Munster	42%
Conn/Ulster	36%

Q48 Do you have an internet connection in your home?

Likelihood of Home Internet in the Future

Base: Does not have an Internet Connection in the Home N = 643



Percentage who said Yes (certain or likely to) :

Gender	
Male	22%
Female	24%
Age	
15-24	34%
25-44	34%
45-64	13%
65-74	0%
Region	
Dublin	19%
ROL	20%
Munster	24%
Conn/Ulster	33%

Q49 Do you intend to get the internet at home in the future?

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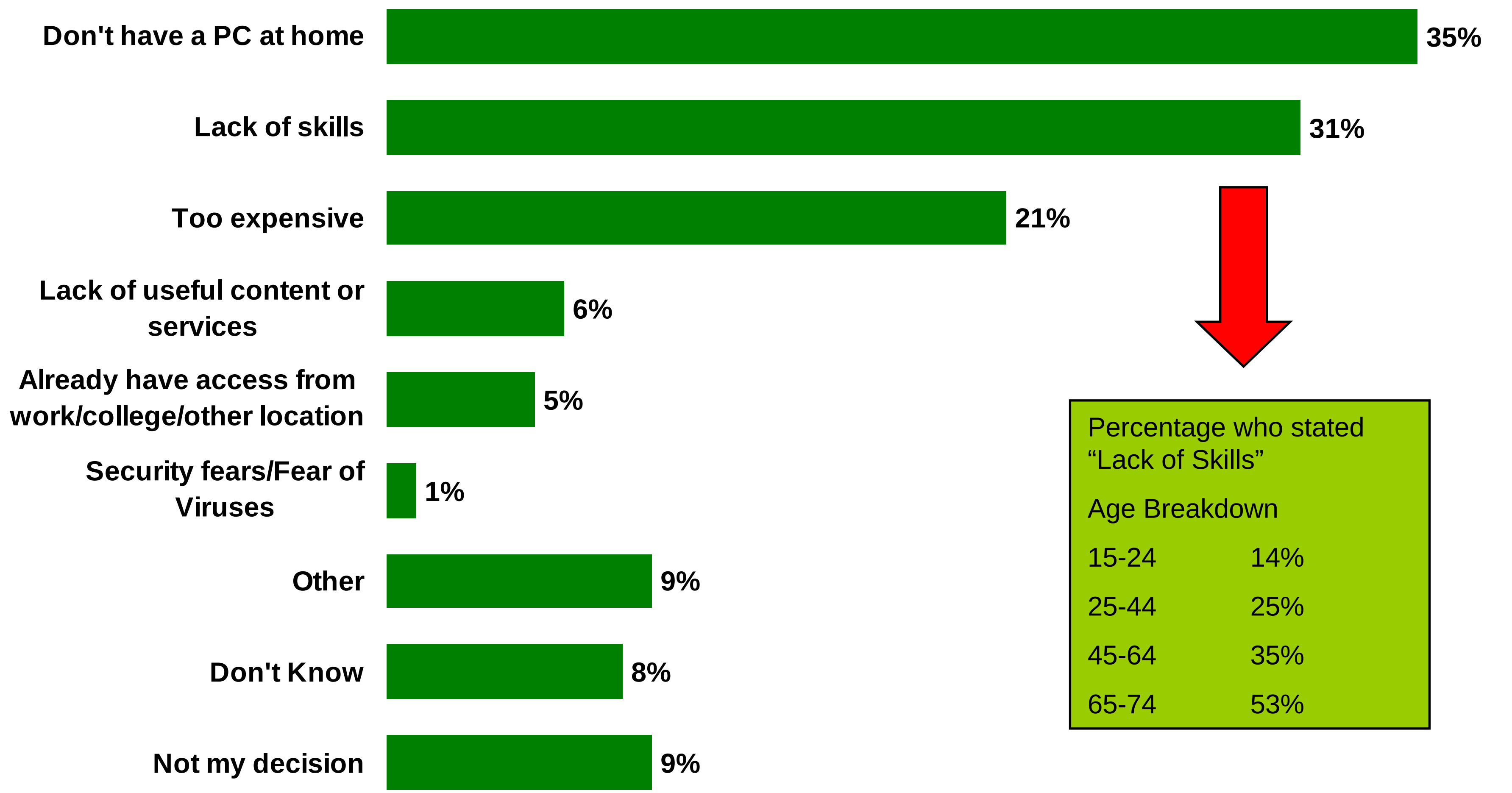
Rationale For Not Getting The Internet At Home

Base: Does not have an Internet Connection in the home N = 493



Percentage who stated "Lack of Skills"

Age Breakdown

15-24	14%
25-44	25%
45-64	35%
65-74	53%

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

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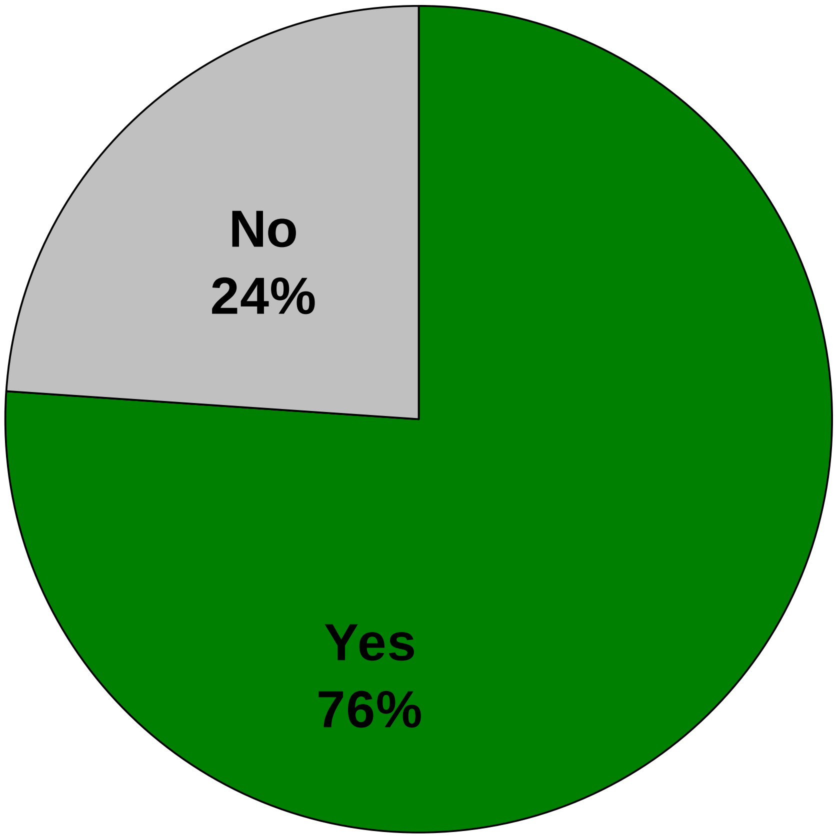
Broadband Awareness

Base: All Respondents N = 1001



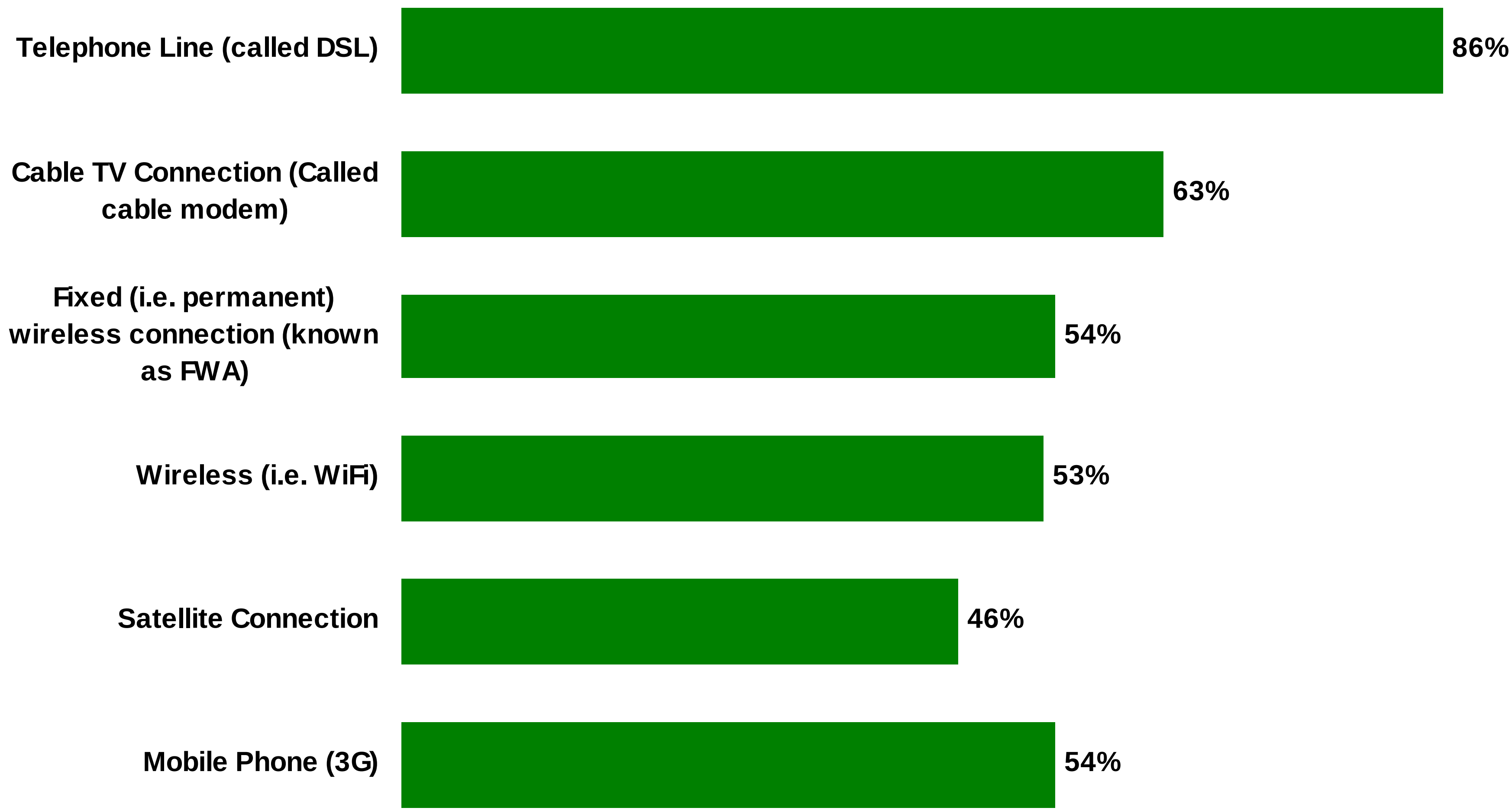
Percentage who said Yes:

Gender	
Male	77%
Female	74%
Age	
15-24	87%
25-44	87%
45-64	66%
65-74	31%
Region	
Dublin	68%
ROL	76%
Munster	77%
Conn/Ulster	86%

Q51 Are you aware of a service which is available called broadband Internet access?

Awareness of broadband access across the following connections

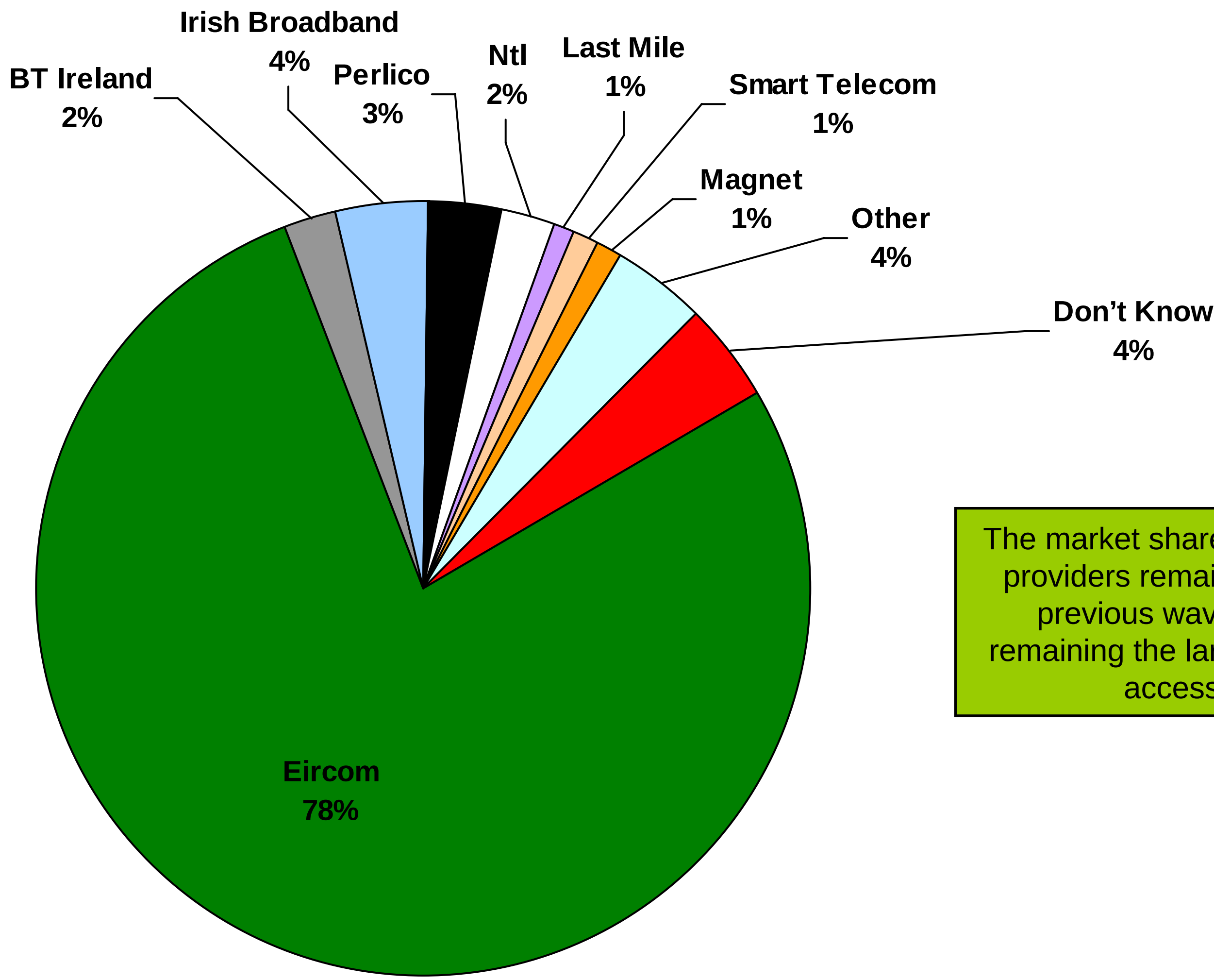
Base: Those aware of broadband internet access N = 743



Q.52 Are you aware that broadband services are currently available over the following types of connection?

Home Internet Access Providers

Base: Has Internet Connection at Home N = 358



The market share of Internet service providers remains consistent with previous waves, with Eircom remaining the largest home internet access provider

Q.53 Who is your home internet service provider (ISP)?

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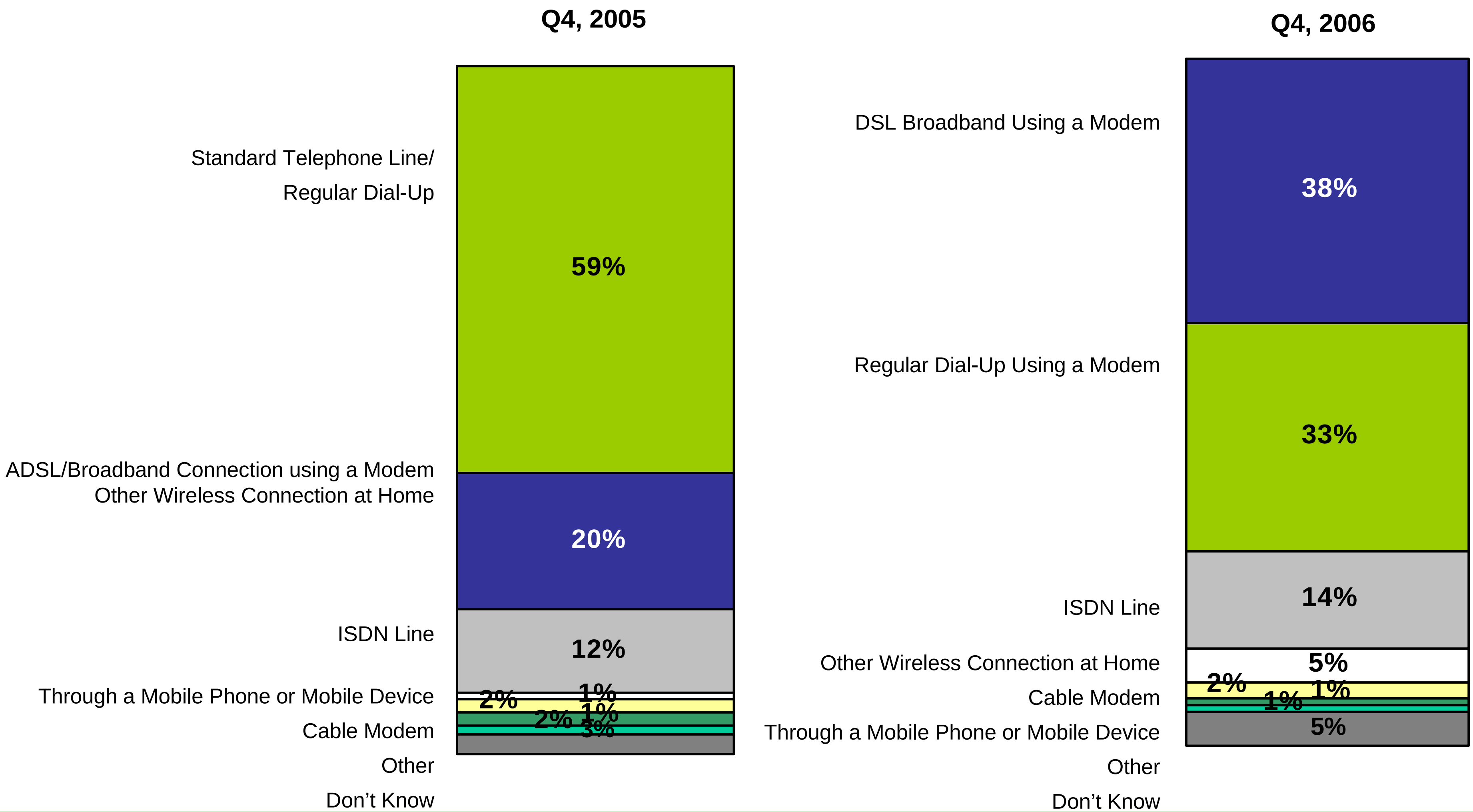
Methods of Internet Connection

Base: Has an Internet Connection at Home N = 358



Q.54 How do you connect to the internet from home?

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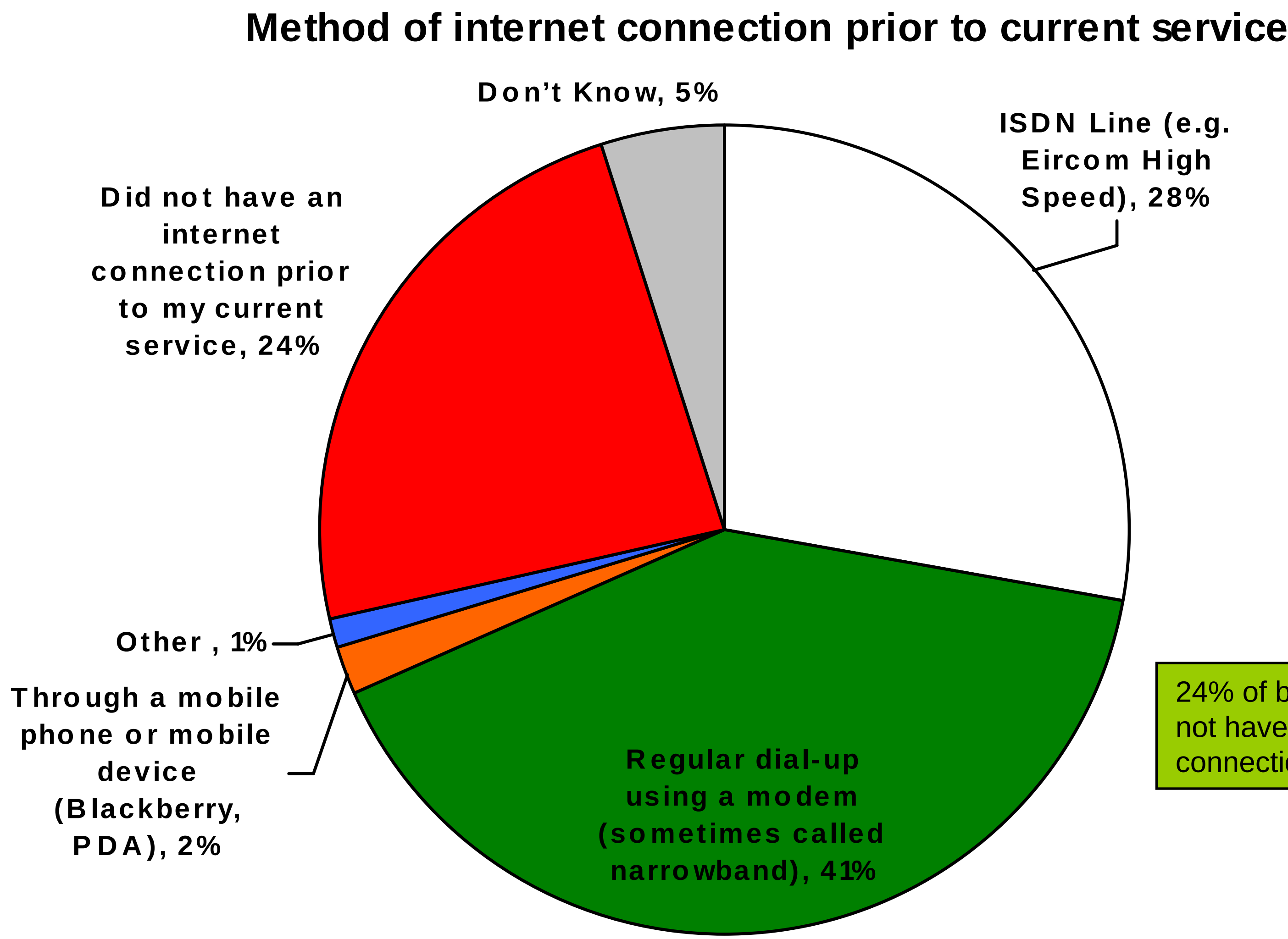
Respondents' prior means of internet connection

Base: Uses broadband or a high speed service N = 170

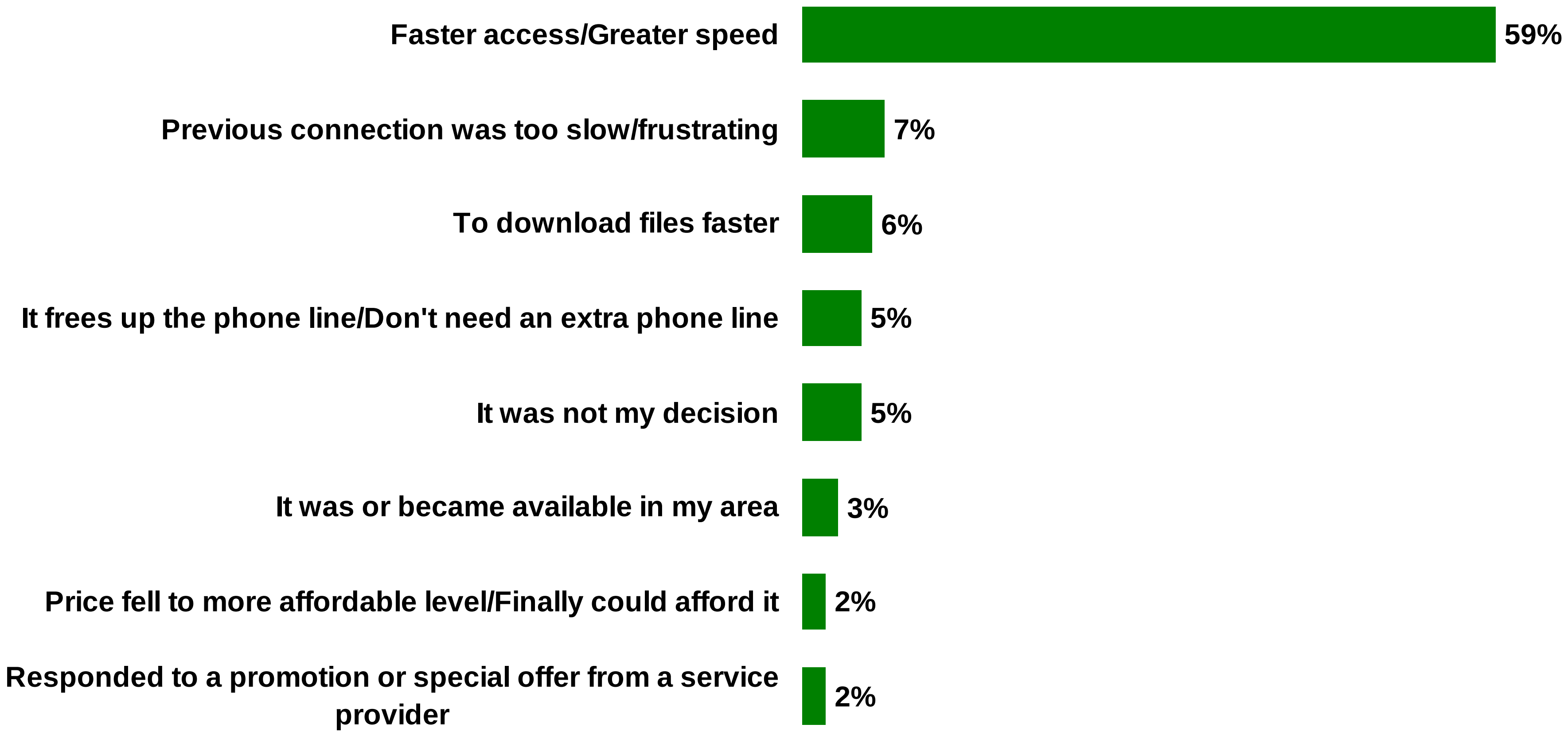


24% of broadband users did not have a previous internet connection

Q55 How did you connect to the internet from home before using this service?

Reasons for High-Speed Internet Connection

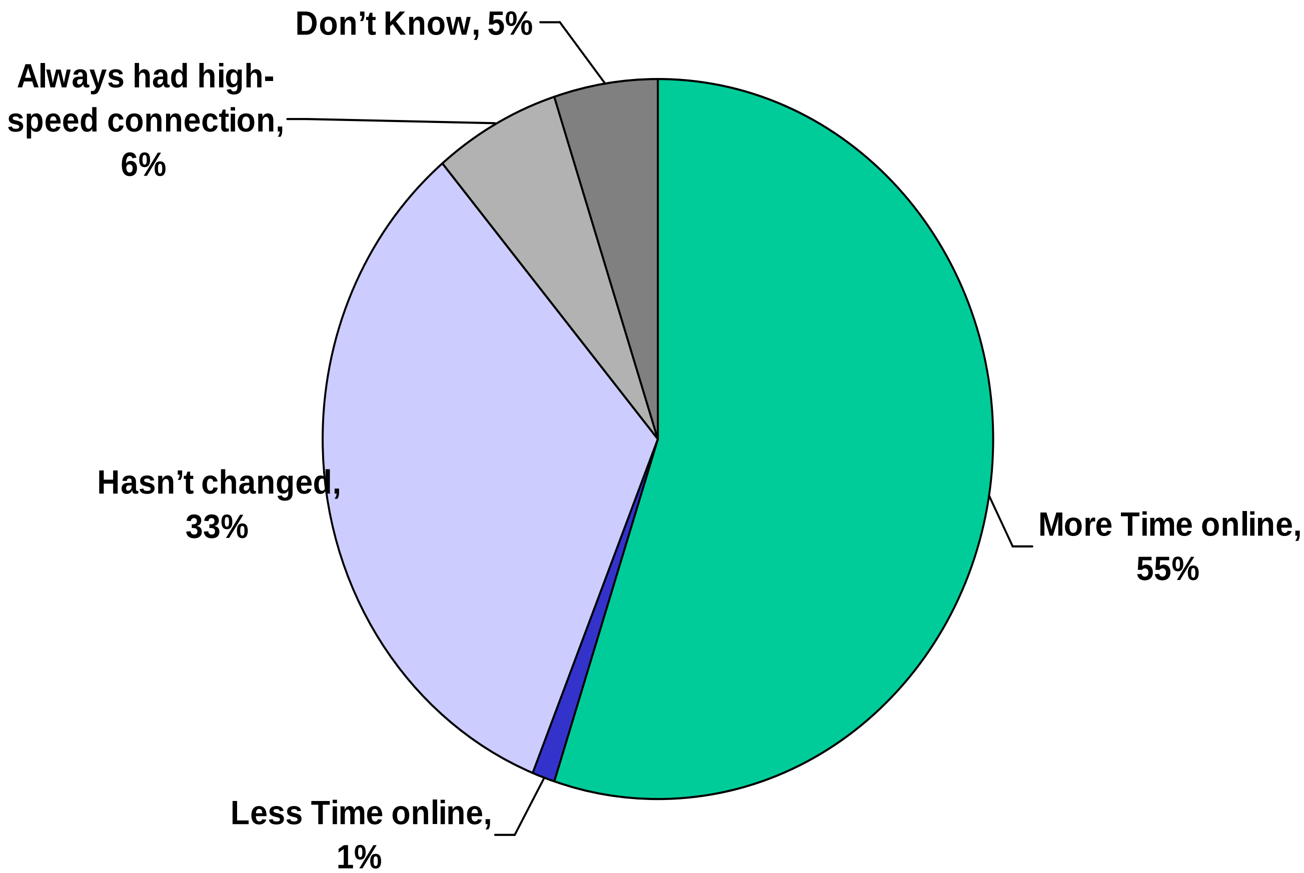
Base: Uses broadband or a high speed service N = 170



Q.55a What is the main reason you decided to get a high-speed Internet connection at home?

Time spent online at home since the adoption of the high speed internet connection

Base: Uses broadband or a high speed service N = 170



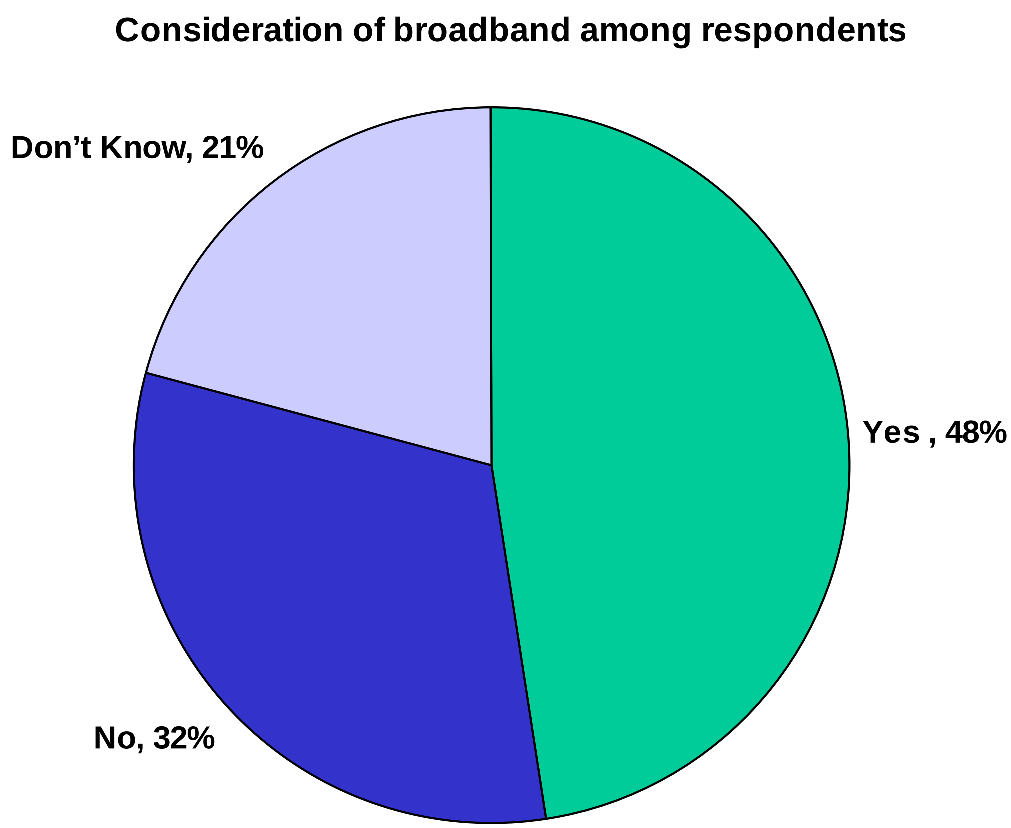
Percentage who said their behaviour hasn't changed:

15-24	19%
25-44	37%
45-64	38%
Student	25%
Working	33%
Unemployed	-
Other	49%

Q.55b Since getting a high speed internet connection at home, would you say you have spent more time online at home, less online or has this not changed?

Consideration of broadband adoption

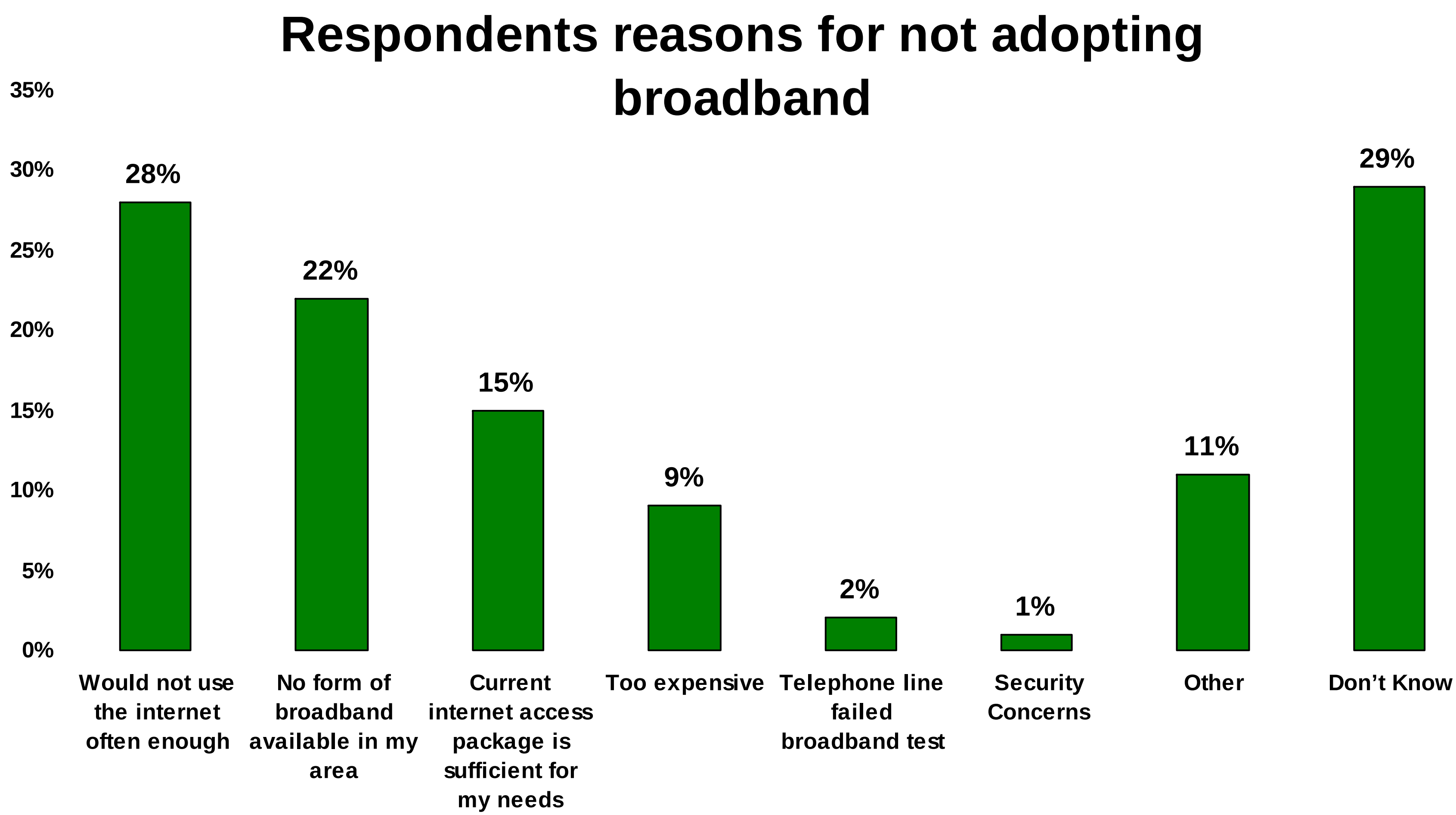
Base: Uses dial up modem or ISDN to access internet N = 188



Q.56 Have you considered moving to a broadband connection for your home internet access?

Reasons Behind not Moving to Broadband

Base: All those whom use a dial-up modem or ISDN to access internet, but not considered moving to broadband N = 318



Q.57 Why have you not considered moving to a broadband internet connection?

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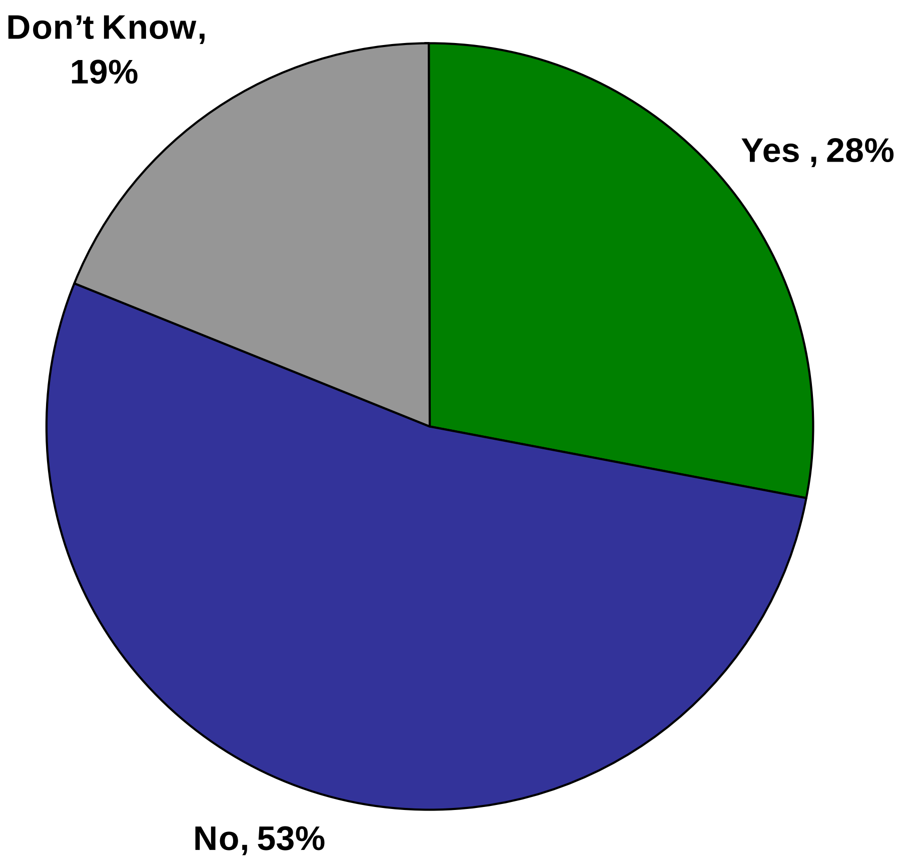
Availability of Broadband Connection to your Home

Base: Uses dial up modem or ISDN to access internet N = 188



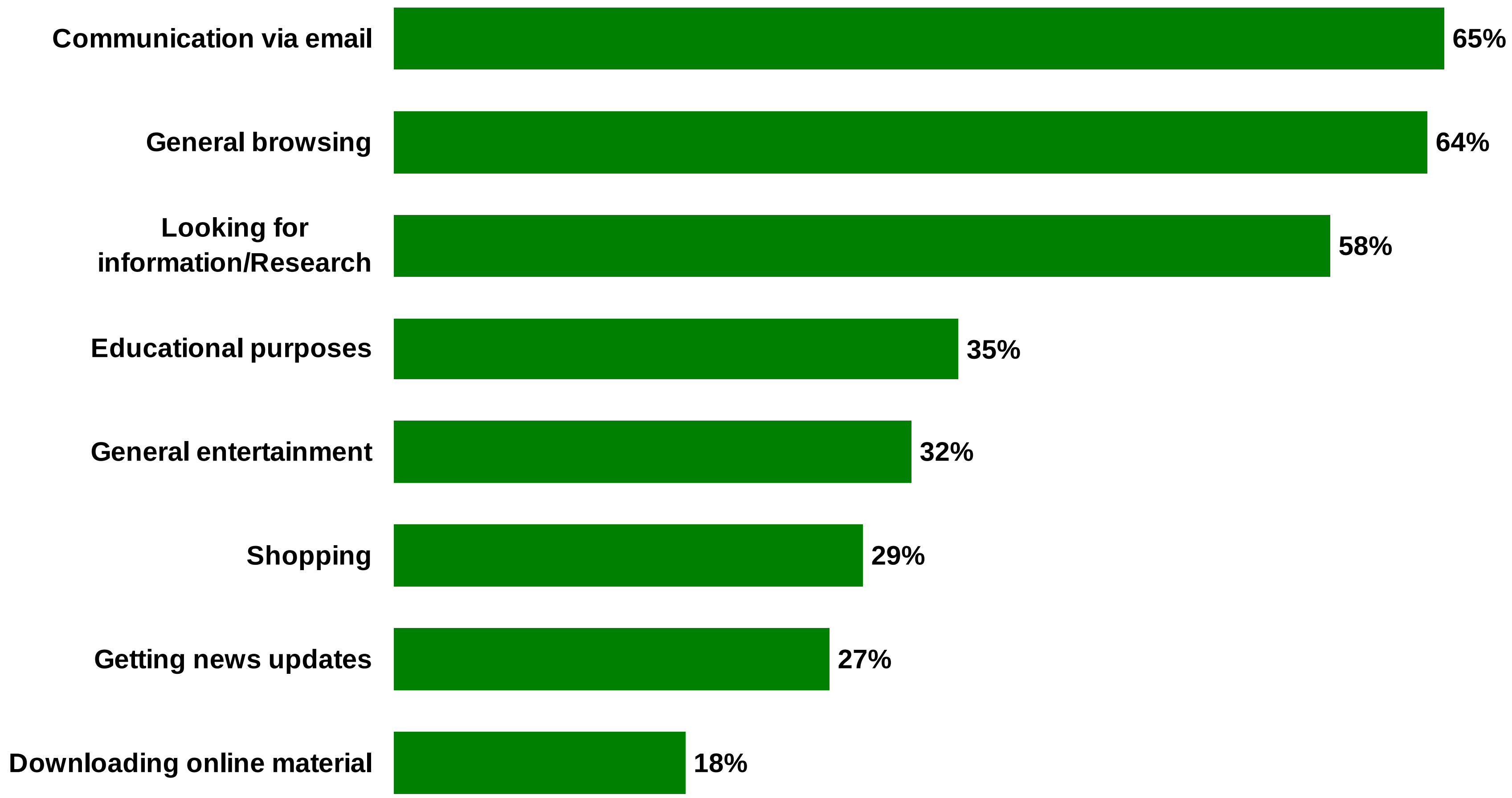
Percentage who said Yes:	
Region	
Dublin	**11%**
ROL	**31%**
Munster	**27%**
Conn/Ulster	**36%**

28% of narrowband users been attempted unsuccessfully to get broadband at some point in the past.

Q.58 Have you ever attempted to get a broadband connection to your home and been told that it was not available to you?

Uses of Home Internet connection

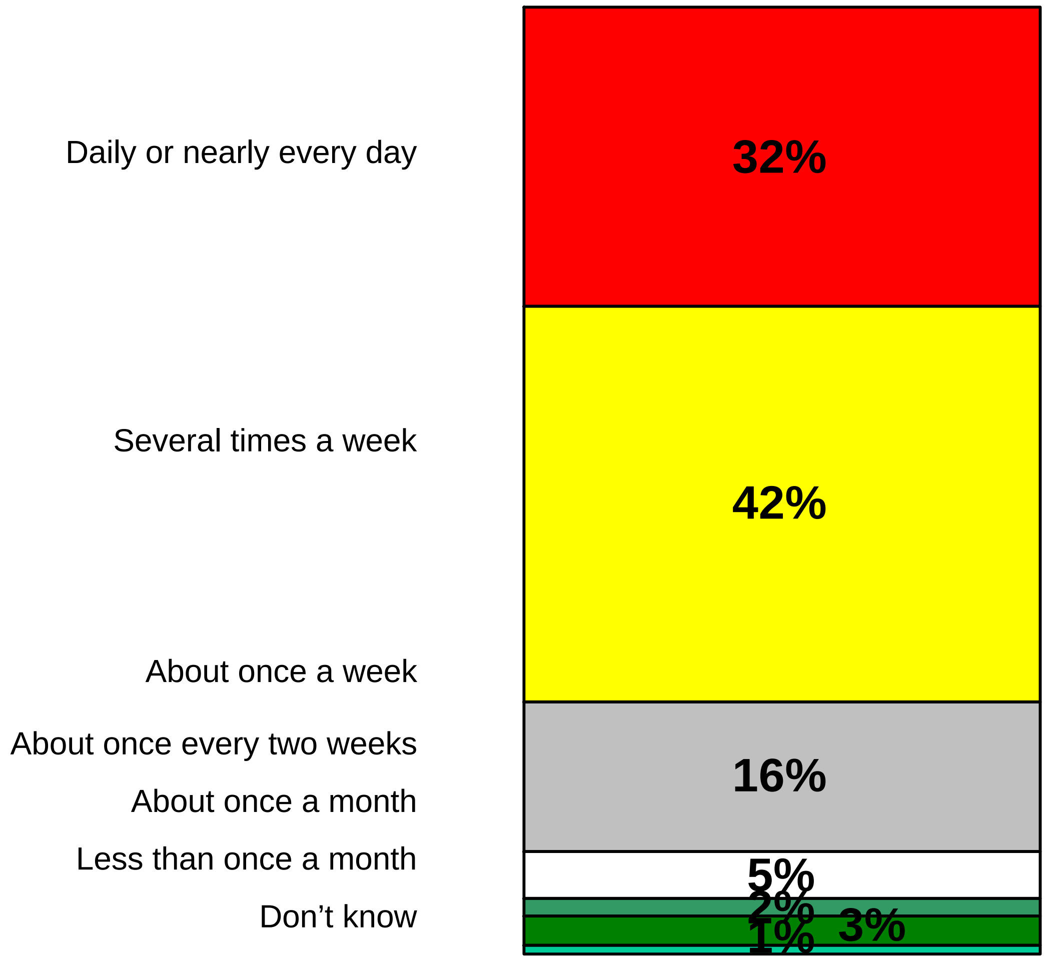
Base: Those whom have an internet connection at home N = 358



Q.59 What activities or uses do you use your home internet connection for?

Frequency of Internet Use

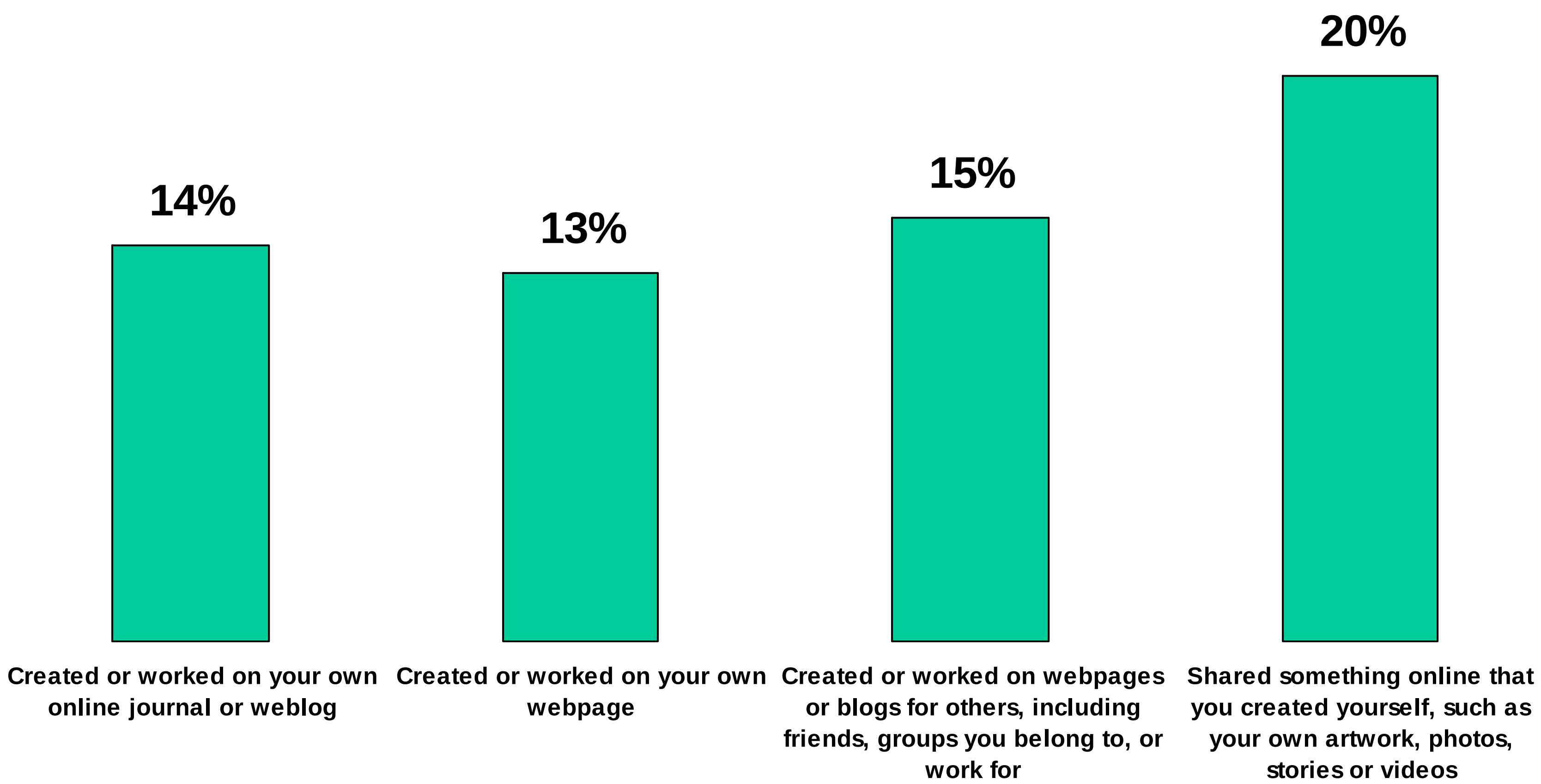
Base: Uses the internet N = 458



Q.60 How often do you use the internet from any location?

Activities that respondents carry out online

Base: Uses the internet N = 458

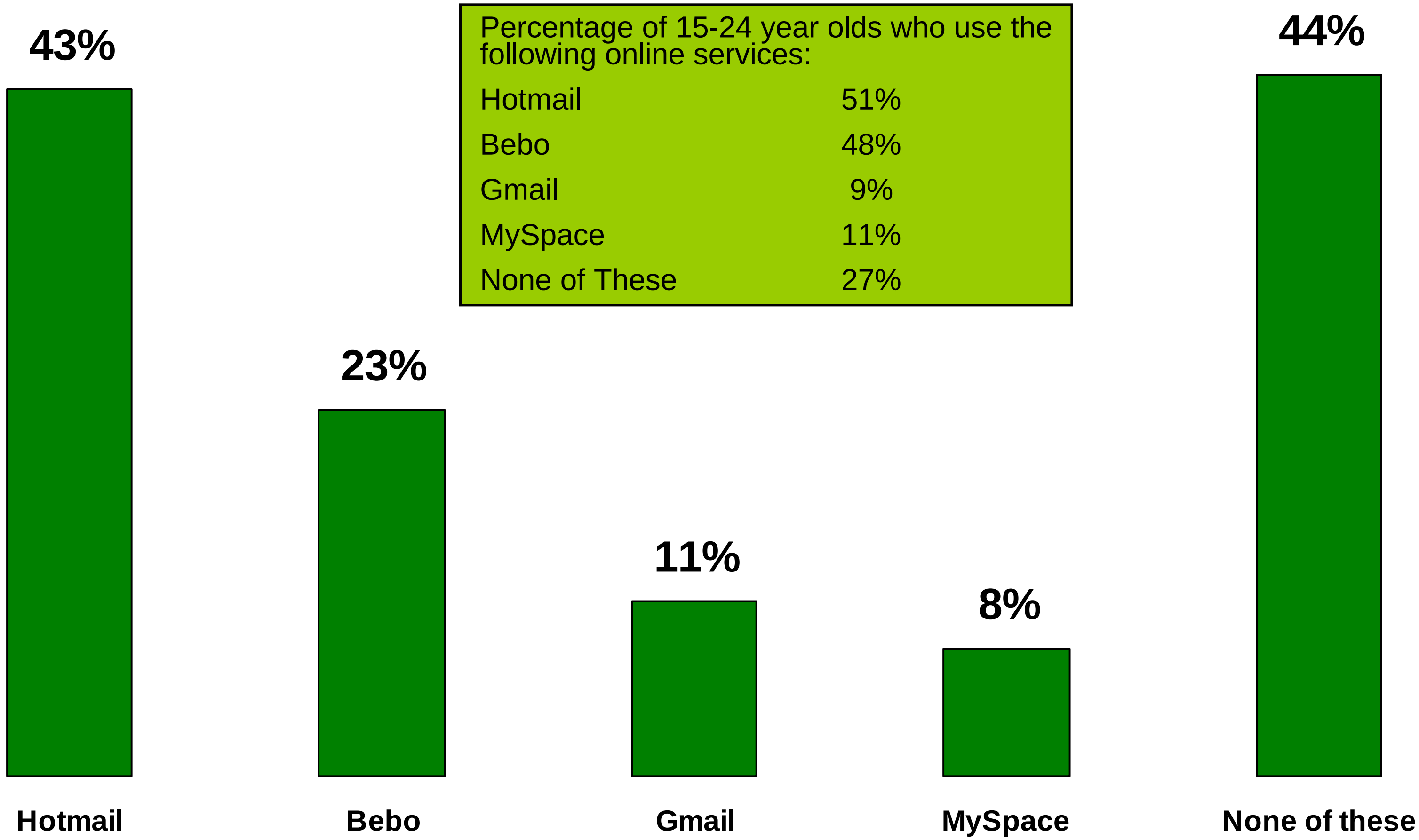


Of the 15% of individuals who created or worked on webpages or blogs for others, almost 1 in 5, 19% had broadband, while 8% had no broadband connection. As to be expected of the 20% who share something online, the findings revealed higher broadband connection rates, with 30% of these individuals connected to broadband, while a lower 12% were without broadband.

Q.60a I am going to read out a list of activities which can be carried out online. Please tell me whether you have ever carried out any of the following activities?

Usage of various online services

Base: Uses the Internet N = 458



Percentage of 15-24 year olds who use the following online services:

Hotmail	51%
Bebo	48%
Gmail	9%
MySpace	11%
None of These	27%

Q.60b Do you use any of the following services online?

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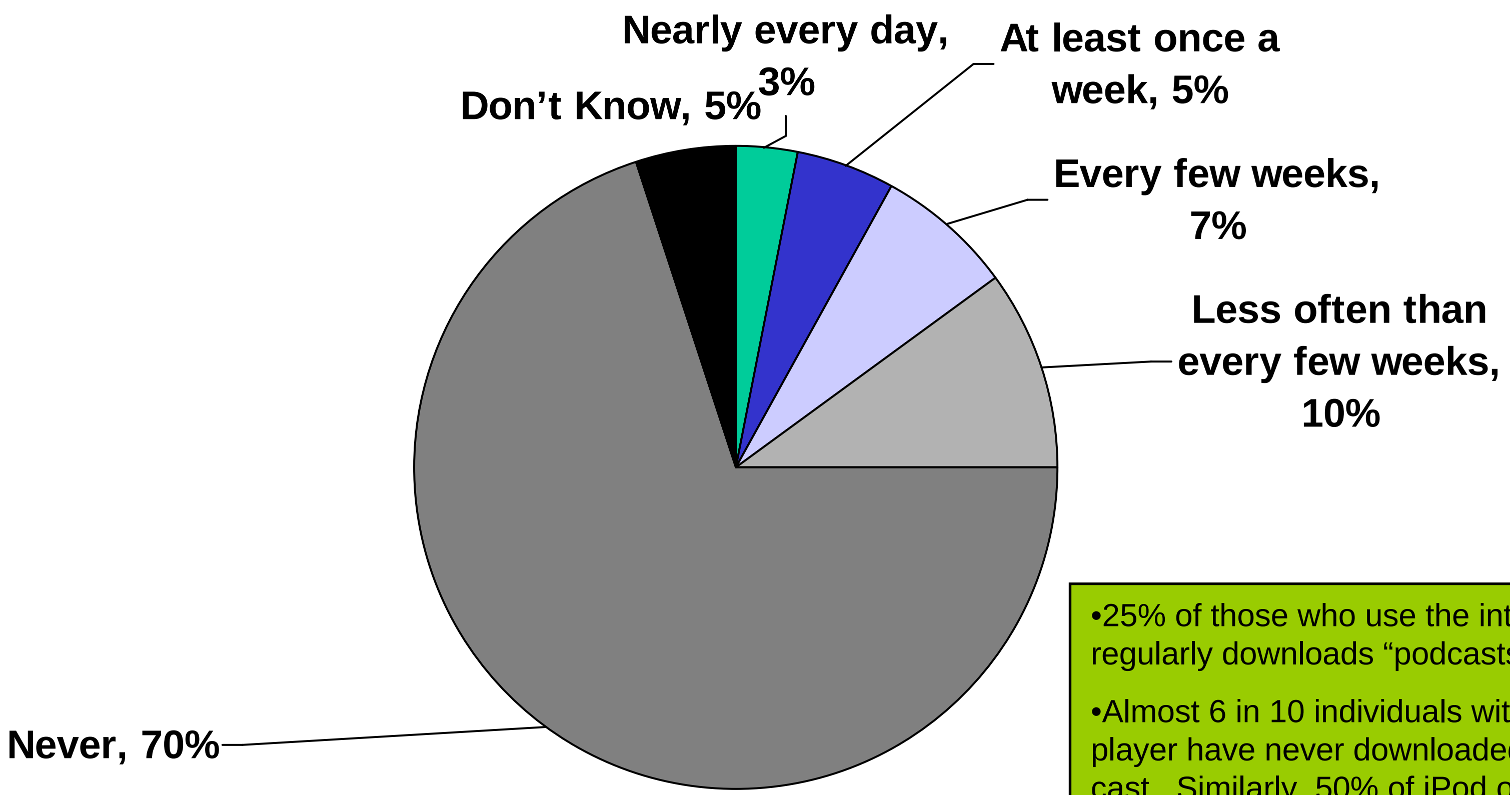
Respondents’ downloading of pod casts

Base: Uses the internet N = 458

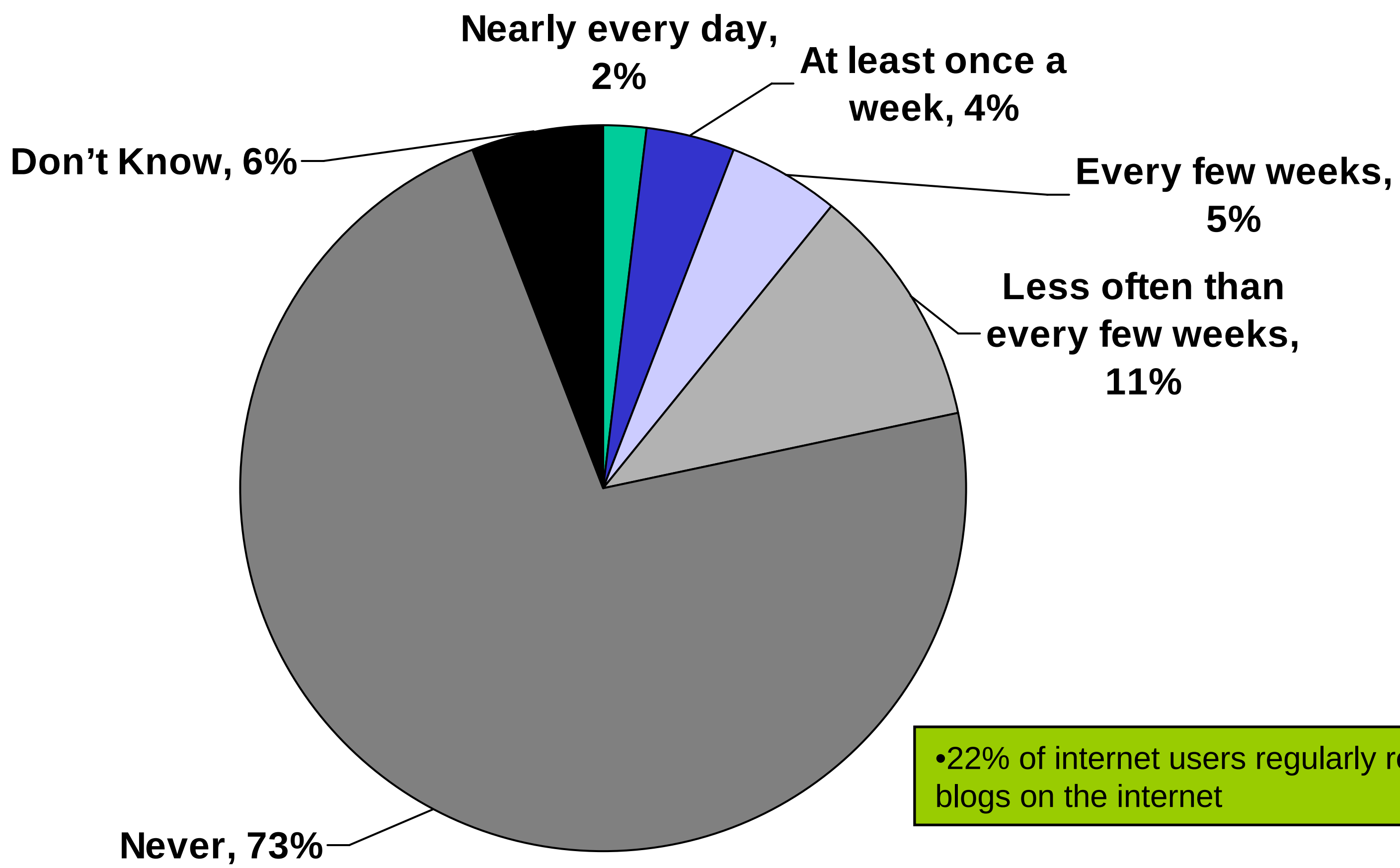


- 25% of those who use the internet regularly downloads “podcasts”
- Almost 6 in 10 individuals with an MP3 player have never downloaded a pod cast. Similarly, 50% of iPod owners have not downloaded pod casts.

Q.60c How often do you download podcasts to listen to or to view?

Respondents' reading of blogs on the internet

Base: Uses the internet N = 458

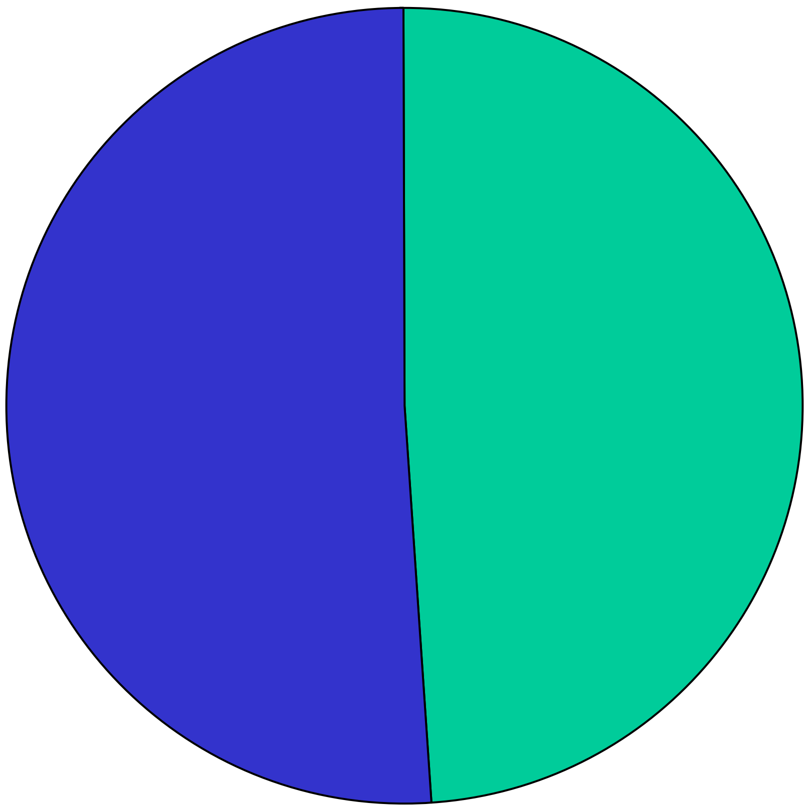


•22% of internet users regularly read blogs on the internet

Q.60.d How often do you read blogs on the internet?

Knowledge of Voice over Internet Protocol

Base: Uses the Internet N = 458



Base=224, Uses the Internet, Has heard of VOIP

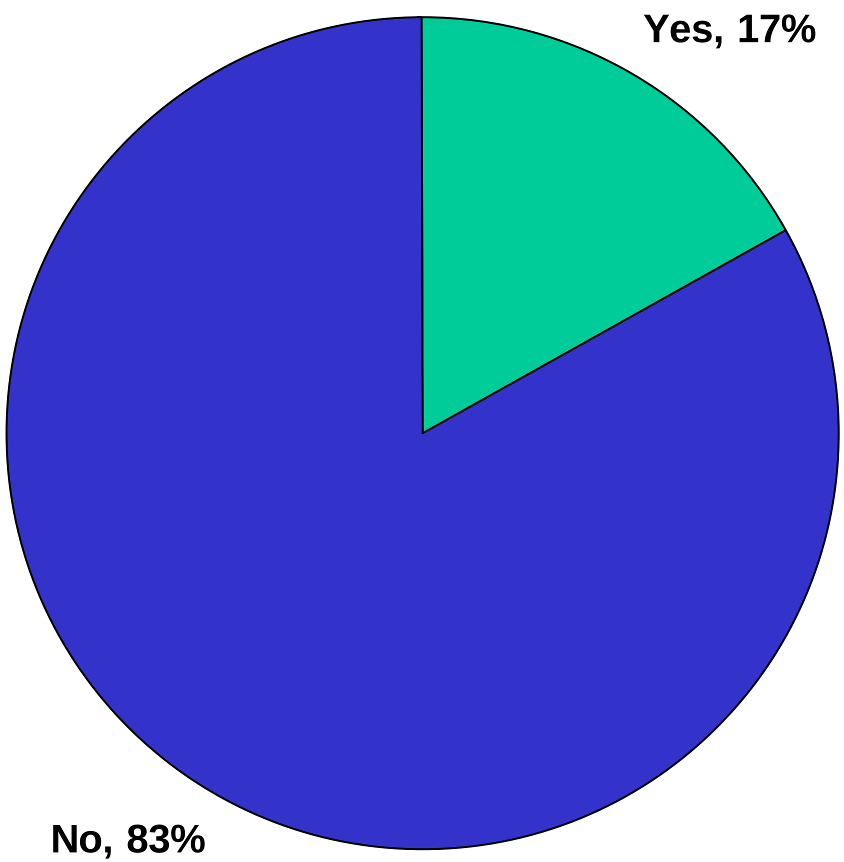
Percentage of those who have heard of VoIP, by usual access location of internet:

Home	84%
Work	58%
School/College	9%
Cyber Cafes	8%
Friend's House	8%
On the move using portable equipment	3%

Q.61 Have you ever heard of Voice over Internet Protocol (VoIP) or internet telephony, whereby you can use your internet connection to make voice calls?

Usage of Voice over Internet Protocol

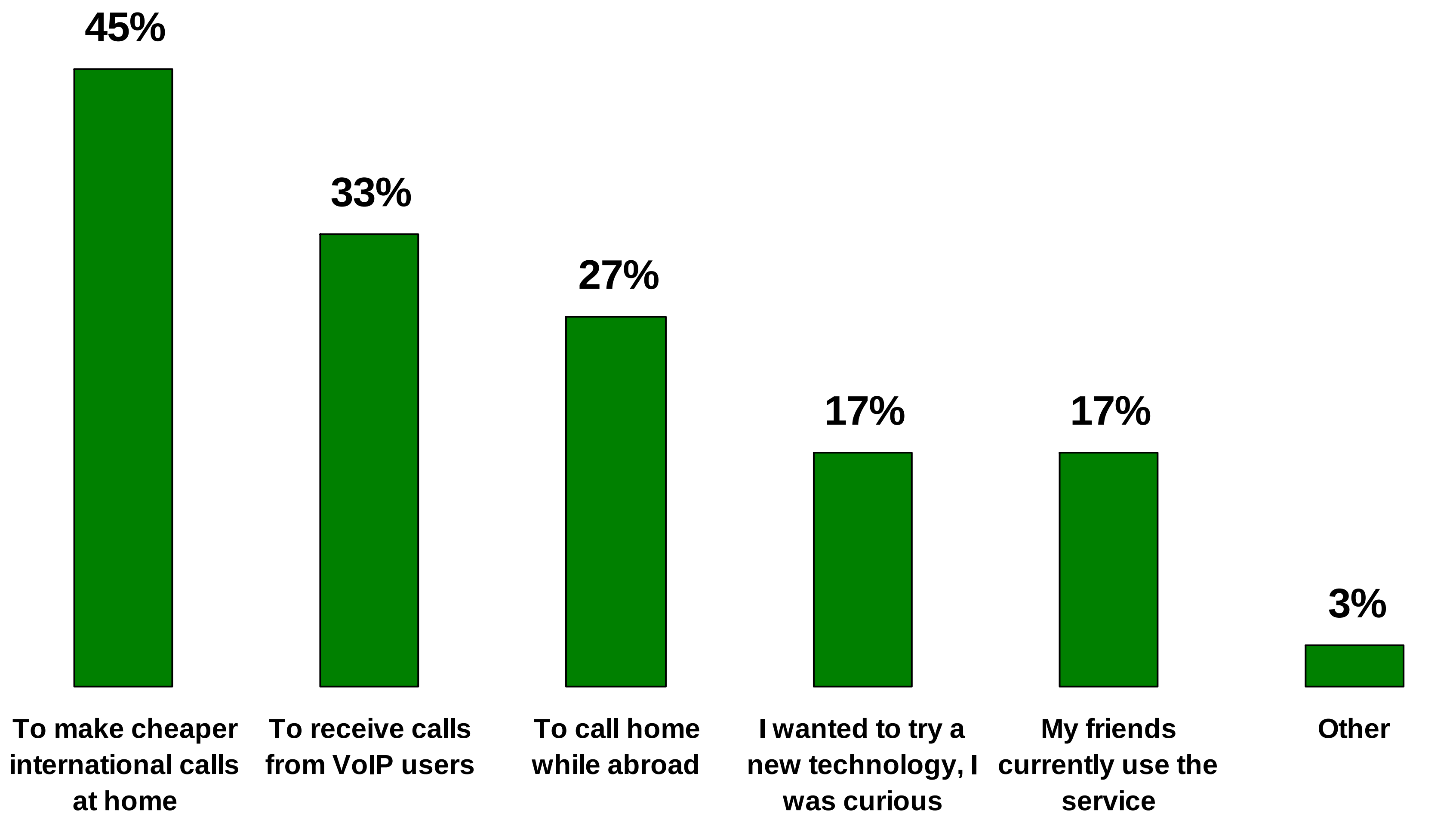
Base: Use the internet and heard of VoIP N = 204



Q.62 Have you used a (VoIP) service in the last three months to make calls over the internet?

Reasons behind use of a VoIP service

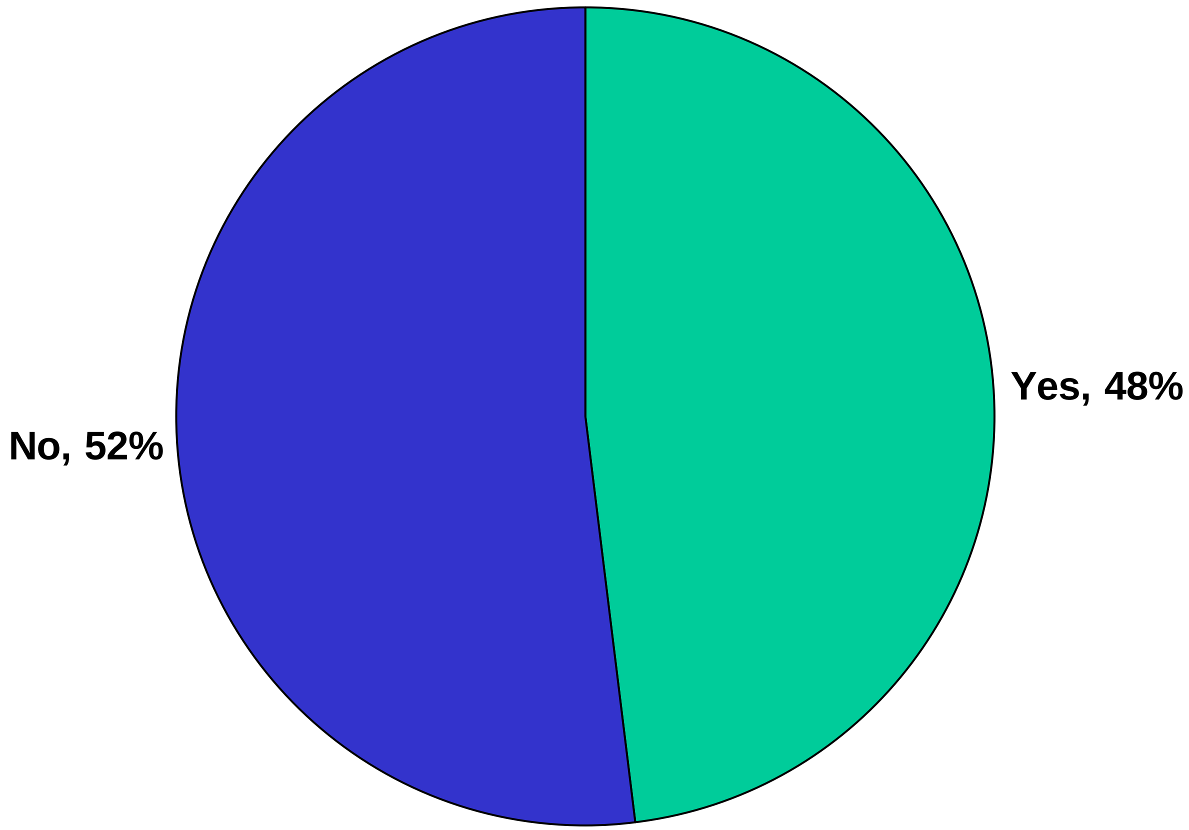
Base: Uses the internet and has heard of and used VoIP N = 37 (Note: Small Base)



Q.63 Why did you choose to use a VoIP service?

Consideration of the possible use of VoIP in the Future

Base: Uses the internet N = 458



Percentage who said Yes, Use of the Internet:

Daily or nearly every day	39%
Several times a week	43%
About once a week	14%
About once every 2 wks	3%
About once a month	1%

Q.64 Would you consider using an internet connection to make voice calls using a VoIP in the future?

Conclusions

Conclusions

- As with previous waves, fixed line subscriptions remain unchanged, while mobile phone subscriptions levels have also stabilised. Those aged 15-24 and 25-44, students and working individuals are most likely to have a mobile phone.

- 41% of fixed line customers are now using some form of bundled service, most popularly one that combines line rental with a bundle of calls.

- In relation to choosing mobile phone service provider, the findings revealed that value for money is integral, with 94% of individuals stating that value and lower prices were important factors in the decision-making process.

- 92% of individuals cited the importance of high quality mobile phone coverage when choosing a service provider, while 86% of individuals perceived mobile phone service provider branding and recognition within the market as important when choosing a mobile provider.

- Internet penetration levels remain constant with the margin of error for the sample, with almost 5 in 10 individuals using the Internet from any location. In a similar vein to previous waves, usage remains high amongst core groups such as those aged 15-24, students and individuals working.

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Conclusions

- Overall, individuals awareness of broadband is high, with almost 8 in 10 aware of this service. Eircom remains the largest internet access provider with 76% of individuals using this service. Similar to previous waves, DSL broadband (38%) and Regular Dial-Up (33%) remain the main means of connecting to the Internet.

- Almost 6 in 10 individuals who use broadband or another high-speed service contend that their online behaviour has increased since they adopted broadband.

- The main reasons for non-adoption of broadband among Internet users related to minimal usage (28%) and perceived unavailability of broadband service (22%).

- Similar to previous waves, the top three most popular online activities by individuals relate to communicating (65%), browsing (64%) and information search (58%). In relation to Internet usage 32% of individuals demonstrate high usage rates by using the Internet daily or nearly every day, while 42% of individuals use the Internet several times a week.

- The findings highlighted the emerging role of the Internet as a social network medium, with 2 in 10 people using it for sharing personal content such as, artwork, photos, stories or videos.

Amárach Consulting
37 Northumberland Road
Dublin 4
Ireland
Tel: 01 660 5506
Fax: 01 660 5508
info@amarach.com
www.amarach.com

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Appendix: Note on Methodology

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Methodology

- 1001 people surveyed aged 15 - 74.
- Nationally rrepresentative 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 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

Amárach Consulting

37 Northumberland Road

Dublin 4

T. (01) 660 5506

F. (01) 660 5508

W: www.amarach.com