ComReg Connectivity Survey

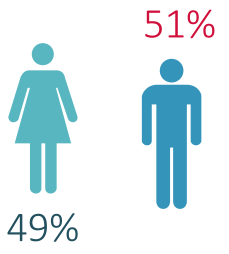
March 2021

ComReg Doc 21/30

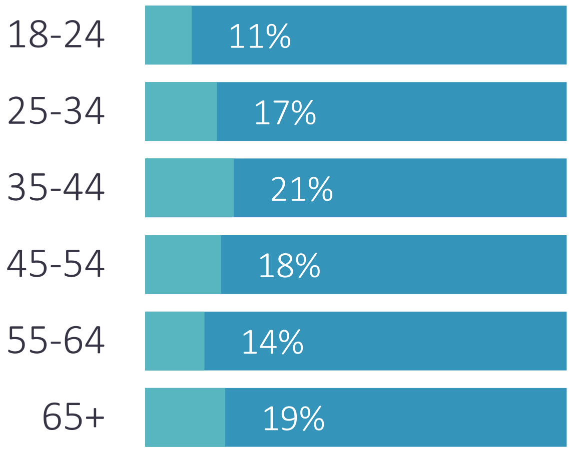
Methodology

- Face-to-Face research was conducted with 1,480 ROI adults aged 18+.
- All adults are responsible or jointly responsible for making decisions regarding telecommunications
- Quota controls were used at the outset to ensure a nationally representative sample of ROI adults aged 18+, with interlocking quotas to provide extra confidence in sample profile
- Data captured was weighted across Gender, age, province, region and social class so as to ensure a nationally representative sample
- Breakdown of Regions (based on CSO Census data on population density)
  - Region 1 <10 people per sq km,
  - Region 2 between 10-25 people per sq km,
  - Region 3 between 25-50 people per sq km,
  - Region 4 50-100 people per sq km,
  - Region 5 over 100 people per sq km
- Fieldwork for this research took place from September 9th – October 15th and December 2nd – December 24th 2020

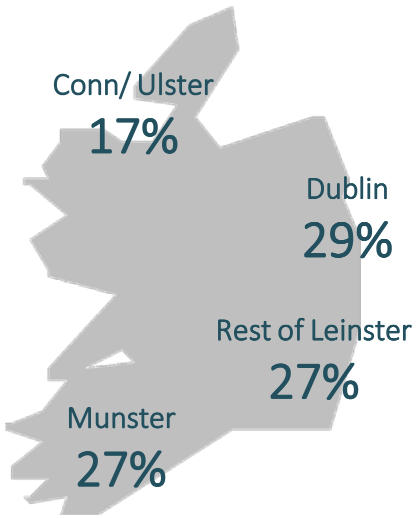
Gender



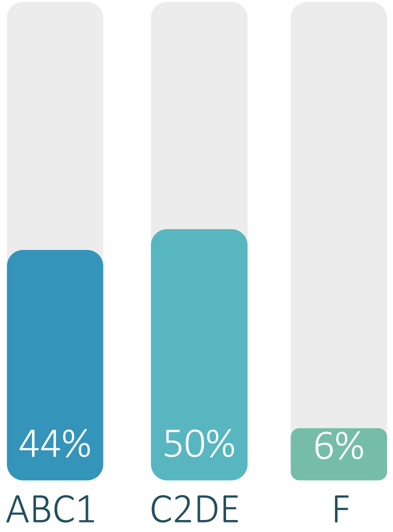
Age



Ireland



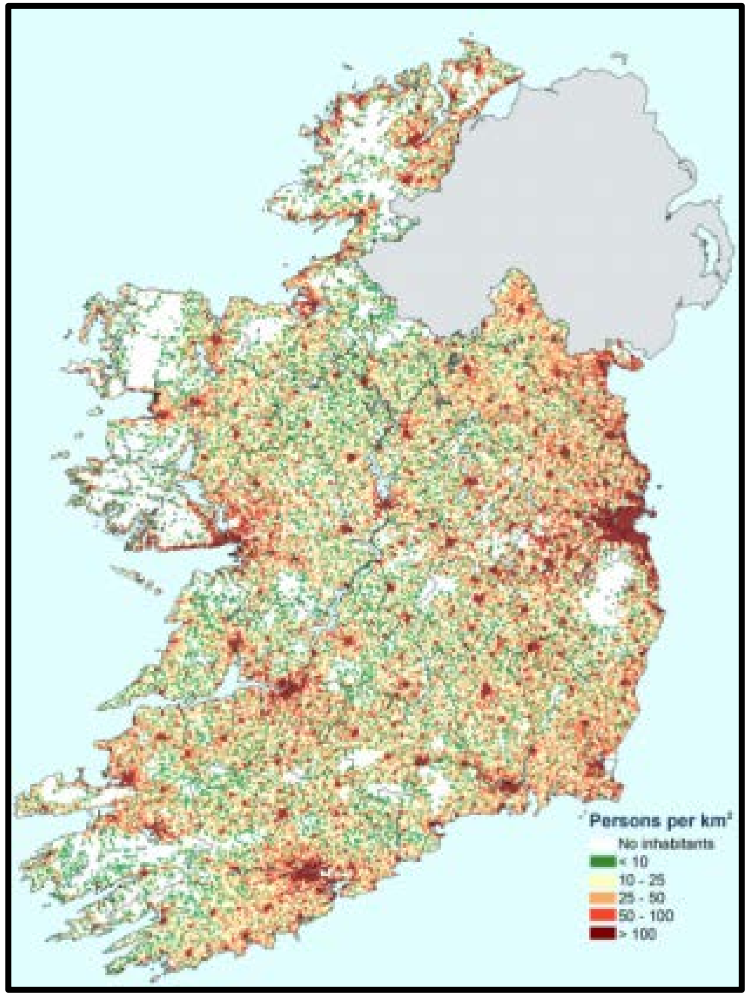
Social Class



Sample size and population density

	Sample 1	Sample 2	Sample 3	Sample 4	Sample 5
Sample Size	271	331	232	220	426
Population Density	<10 per Sq. Km	<25 and >10 per Sq. Km	<50 and >25 per Sq. Km	<100 and >50 per Sq. Km	>100 per Sq. Km
Total Population (2016)	54,680	475,702	650,521	507,773	2,899,576
Sq. Km	9,912	27,362	18,940	7,412	4,839
Number of Electoral Divisions (circa)	296	1,162	849	342	777

Rural → Urban



Source: CSO, Census 2011

Overview

1. Ownership of Telecommunication Services
2. Broadband Usage, Switching & Faster Broadband Services
3. Landline
4. Bundles & Contracts
5. TV
6. Key Findings

Ownership and Non-Take-up of Services

Telecommunications Ownership / Access in home

Dubliners most likely to own TV, broadband and Landline

	Total	ComReg Region: (Most Rural) 1 (n=271)	2 (n=331)	3 (n=232)	4 (n=220)	(Most Urban) 5 (n=426)	National Region: Dublin (n=340)	Rest of Ireland (n=1140)	Age: 18-34 (n=358)	35-54 (n=672)	55+ (n=450)
Mobile phone service	95%	96%	97%	92%	97%	95%	93%	**96%**	97%	98%	91%
Paid or free TV	80%	81%	80%	78%	74%	81%	87%	**77%**	71%	82%	83%
Fixed Broadband	75%	65%	74%	58%	66%	80%	97%	**66%**	86%	81%	58%
Landline telephone	39%	30%	42%	33%	27%	42%	61%	**30%**	25%	39%	49%
Mobile Broadband	10%	11%	4%	10%	17%	10%	2%	**13%**	12%	11%	6%
NET: ANY BROADBAND	**83%**	**75%**	**77%**	**66%**	**81%**	**89%**	**98%**	**78%**	**96%**	**92%**	**63%**

(Q.2)

(Base : All Telecoms Decision Makers; n=1480)

Reason for not having broadband

Main reason for not having broadband is not needing it

Older age cohorts are most likely to not have access to broadband because they don't need it, and much less likely to report accessing internet on a smartphone instead.

		ComReg Region		* Small Sample			National Region		Age	* Small Sample	
	Total	1 (n=51)	2 (n=60)	3 (n=40*)	4 (n=32*)	5 (n=24*)	Dublin (n=9*)	Rest Of Ireland (n=198)	18-34 (n=24*)	35-54 (n=49*)	55+ (n=134)
Not interested in/don't need/use broadband at home	60%	46%	37%	64%	52%	68%	25%	61%	6%	41%	70%
Access internet over smartphone instead	19%	42%	33%	13%	26%	16%	17%	19%	59%	29%	13%
I do not know how to use devices that can be connected to broadband (e.g. computer)	17%	8%	39%	20%	21%	7%	*	17%	0	4%	22%
Installation/connection charges are too high	8%	10%	10%	4%	28%	4%	0	8%	50%	6%	5%
The recurring monthly price of broadband service is too expensive	6%	5%	5%	7%	27%	0	0	6%	12%	2%	6%
Worried about security/ ID theft	6%	2%	17%	7%	11%	0	0	6%	0	6%	6%
Internet/broadband service available in the area that I live in is too slow or does not meet my/our requirements	4%	7%	10%	5%	9%	0	*	4%	14%	13%	1%
Use broadband at work/ elsewhere	3%	7%	4%	0	19%	0	0	3%	21%	6%	1%
Price of computers/other personal devices that can be connected to broadband is too expensive	2%	5%	3%	2%	11%	0	0	2%	0	2%	2%
Internet/broadband service is not available in the area that I live in	2%	2%	4%	4%	3%	0	0	2%	6%	2%	2%
Other	6%	0	3%	*	2%	12%	58%	4%	0	17%	3%
Don't know	1%	0	0	3%	0	0	0	1%	0	3%	0

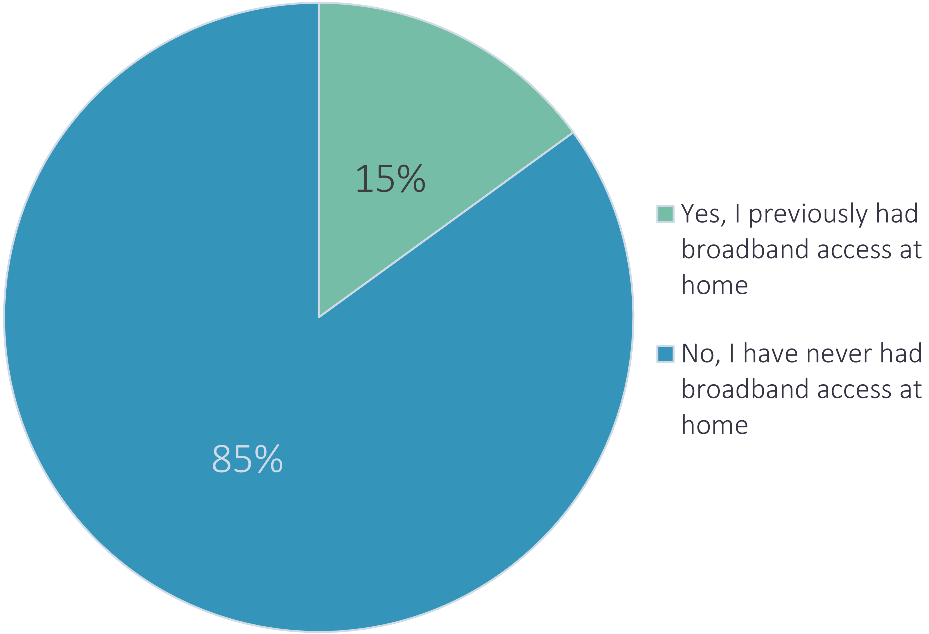
*Caution: Small Base Size

(Q.3)

(Base : All Without Broadband; n=207)

Of those without broadband, had they ever had broadband?

Regions 1-4 are less likely to have ever had Broadband



	ComReg Region					National Region		Age		
	1 (n=51)	2 (n=60)	3 (n=40*)	* Small Sample 4 (n=32*)	5 (n=24*)	Dublin (n=9*)	Rest Of Ireland (n=198)	18-34 (n=24*)	35-54 (n=49*)	55+ (n=134)
Yes, I previously had broadband access at home	7%	9%	8%	10%	23%	0	15%	6%	40%	8%
No, I have never had broadband access at home	93%	90%	92%	90%	77%	100%	85%	92%	60%	92%

*Caution: Small Base Size

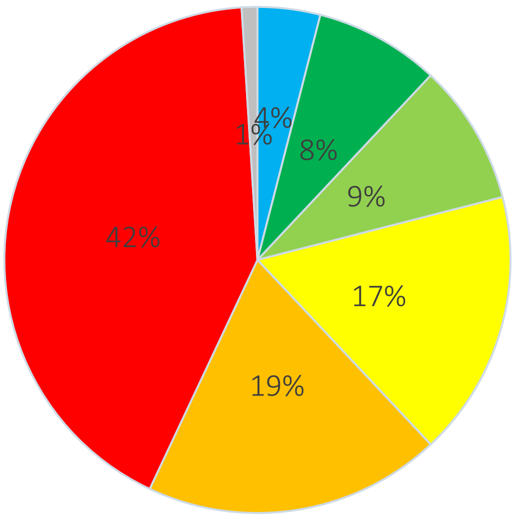
(Q.4)

(Base : All Without Broadband; n=207)

Broadband Usage

Tenure of broadband service at home (regardless of provider)

No real difference in tenure between Dublin and outside Dublin.



Average Tenure:
5.98 Years

	ComReg Region					National Region		Age		
	1 (n=220)	2 (n=271)	3 (n=192)	4 (n=188)	5 (n=402)	Dublin (n=331)	Rest Of Ireland (n=942)	18-34 (n=334)	35-54 (n=623)	55+ (n=316)
6 MONTHS OR LESS	8%	4%	8%	4%	4%	6%	4%	7%	3%	6%
6-12 MONTHS	9%	7%	7%	13%	7%	6%	9%	16%	5%	4%
1-2 YEARS	9%	12%	8%	5%	10%	9%	9%	17%	8%	4%
2-3 YEARS	13%	15%	11%	11%	19%	17%	17%	20%	17%	14%
3-5 YEARS	17%	12%	22%	27%	19%	21%	19%	18%	21%	18%
5 YEARS +	41%	50%	44%	34%	41%	40%	42%	22%	46%	55%
Don't know	2%	0	*	6%	*	1%	1%	1%	1%	*

(Q.27)

(Base : All Telecoms Decision Makers With Access To Broadband; n=1,273)

Why choose selected current broadband provider

Trust is the main driver of Broadband selection in Dublin

		ComReg Region					National Region	
	Total	1 (n=220)	2 (n=271)	3 (n=192)	4 (n=188)	5 (n=402)	Dublin (n=331)	Rest Of Leinster (n=942)
I trust this brand	39%	31%	31%	45%	52%	38%	51%	33%
Promised speed of internet	26%	32%	35%	27%	24%	25%	23%	28%
Better price than my previous service provider	19%	15%	18%	19%	19%	19%	13%	22%
Recommended by a friend/family	14%	27%	22%	23%	35%	8%	7%	18%
It was part of a bundled offer	12%	11%	11%	10%	9%	13%	21%	8%
I saw an advertisement	10%	8%	2%	10%	14%	11%	15%	8%
Special offer/promotion (Any Mention)	8%	17%	9%	9%	24%	6%	3%	11%
Good customer service	8%	13%	15%	8%	18%	5%	7%	8%
Was contacted by the service provider in person (e.g. door-to-door)	8%	7%	7%	12%	11%	7%	3%	10%
Only provider available in my area	5%	12%	15%	4%	8%	3%	2%	7%
Was contacted by the service provider in another way	2%	2%	5%	3%	3%	1%	1%	2%
No hidden charges	1%	2%	1%	2%	8%	*	*	2%
Other	2%	1%	1%	5%	1%	2%	3%	2%

(Q.31)

(Base : All Telecoms Decision Makers With Access To Broadband; n=1,273)

Importance of home broadband service

95% of those regularly working from home highly value their home broadband

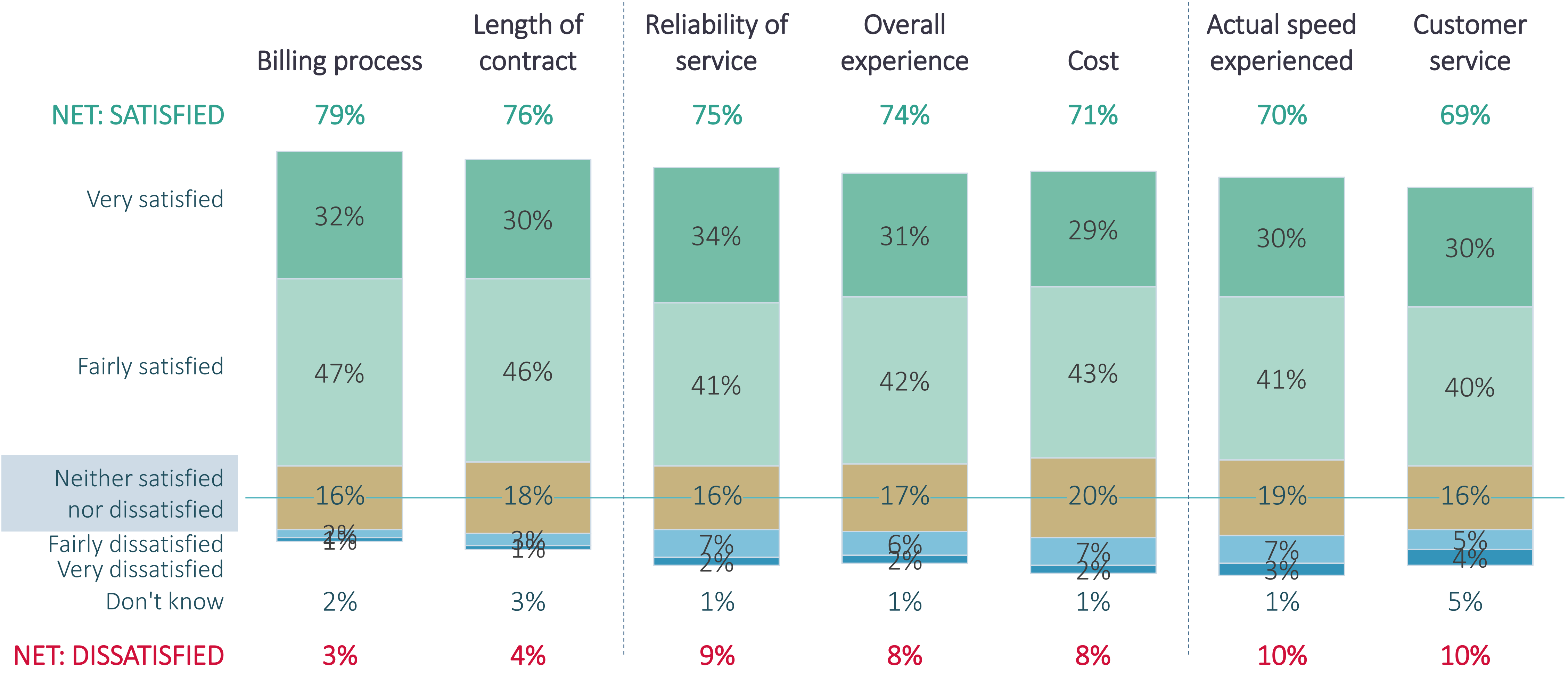
		ComReg Region					National Region		Work from home		Unemployed	Age		
	Total	1 (n=220)	2 (n=271)	3 (n=192)	4 (n=188)	5 (n=402)	Dublin (n=331)	Rest Of Ireland (n=942)	Weekly+ (n=385)	Never (n=324)	Unemployed (n=70)	18-34 (n=334)	35-54 (n=623)	55+ (n=316)
10 – Critically Important to me	39%	36%	59%	22%	30%	40%	24%	47%	55%	23%	42%	43%	42%	29%
9	23%	25%	16%	21%	16%	25%	44%	12%	30%	18%	17%	27%	24%	17%
8	17%	20%	12%	19%	25%	16%	16%	18%	10%	22%	30%	24%	14%	15%
7	12%	12%	7%	22%	19%	9%	7%	14%	4%	22%	5%	5%	14%	15%
6	7%	4%	3%	12%	8%	6%	7%	6%	1%	10%	6%	1%	4%	18%
5	2%	*	2%	1%	2%	2%	2%	2%	1%	4%	*	*	2%	2%
4	*	0	0	1%	1%	*	*	*	0%	1%	0	*	*	1%
3	*	0	1%	0	0	0	0	*	0	0	0	0	0	*
2	1%	0	1%	0	0	1%	0	1%	0	*	0	0	*	2%
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0
0 – Not at all important to me	*	1%	0	0	0	0	0	*	0	*	0	0	0	*
AVERAGE IMPORTANCE	8.66	8.65	9.07	8.09	8.33	8.74	8.63	8.67	9.30	8.08	8.84	9.04	8.79	7.99

(Q.35)

(Base : All Telecoms Decision Makers With Access To Broadband; n=1,273)

Satisfaction with Broadband Service

Highest satisfaction for billing processes and contract length

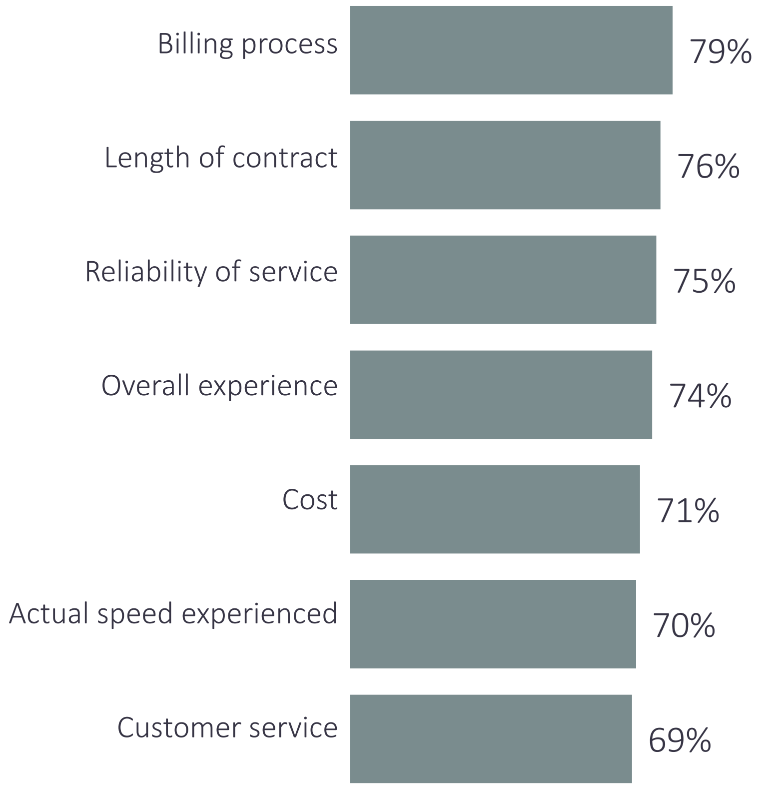


(Q.37)

(Base : All Telecoms Decision Makers With Access To Broadband; n=1,273)

Satisfaction with broadband service: Net satisfied

Satisfaction tends to be higher among Dublin residents



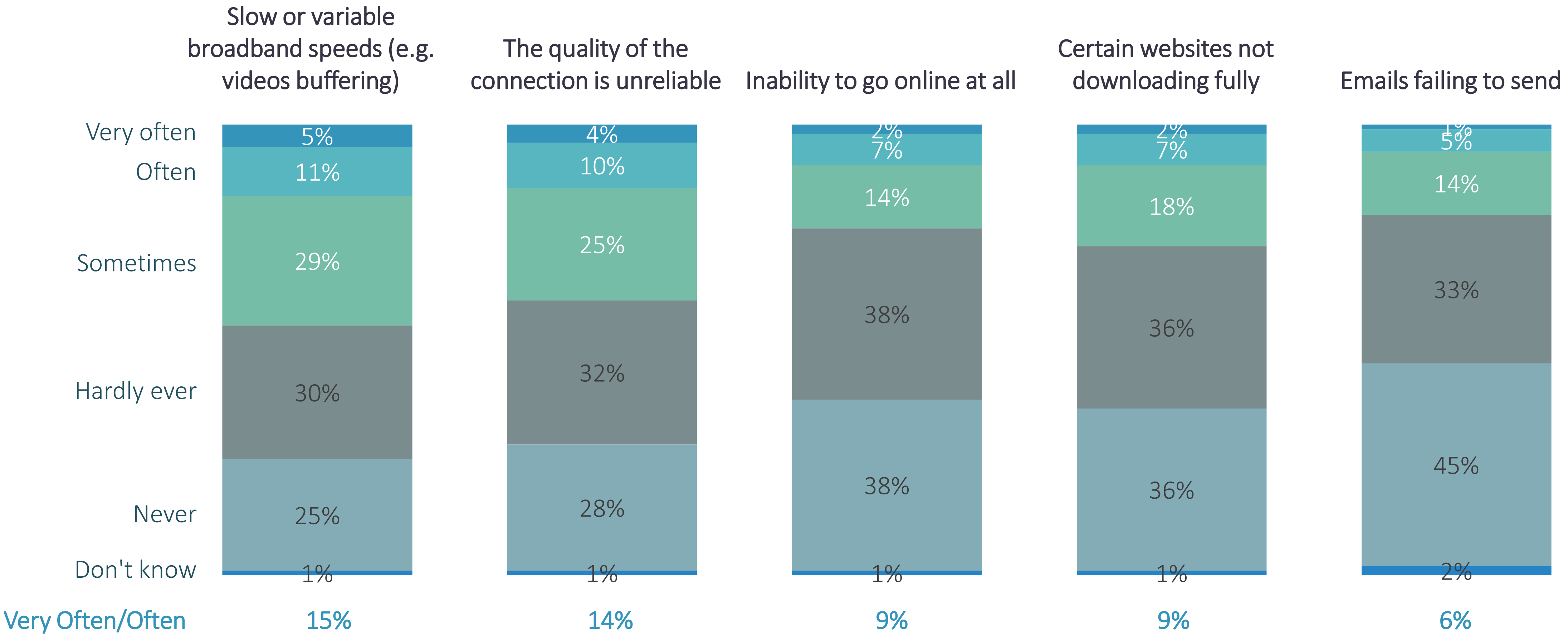
	ComReg Region					National Region		Age			Work from home	
	1 (n=220)	2 (n=271)	3 (n=192)	4 (n=188)	5 (n=402)	Dublin (n=331)	Rest Of Ireland (n=942)	18-34 (n=334)	35-54 (n=623)	55+ (n=316)	Weekly+ (n=385)	Never (n=324)
Billing process	79%	78%	68%	67%	83%	88%	75%	78%	82%	76%	84%	77%
Length of contract	79%	80%	63%	71%	78%	83%	72%	76%	77%	73%	80%	71%
Reliability of service	69%	77%	67%	63%	77%	87%	69%	77%	75%	71%	82%	70%
Overall experience	70%	78%	65%	70%	75%	87%	67%	77%	72%	72%	84%	60%
Cost	74%	61%	66%	58%	76%	86%	64%	72%	73%	68%	76%	68%
Actual speed experienced	66%	74%	63%	58%	73%	86%	62%	75%	70%	66%	78%	60%
Customer service	65%	76%	56%	64%	71%	82%	63%	73%	67%	68%	76%	62%

(Q.37)

(Base : All Telecoms Decision Makers With Access To Broadband; n=1,273)

Frequency of experiencing problems with broadband

Slow speeds and quality of connection are most common

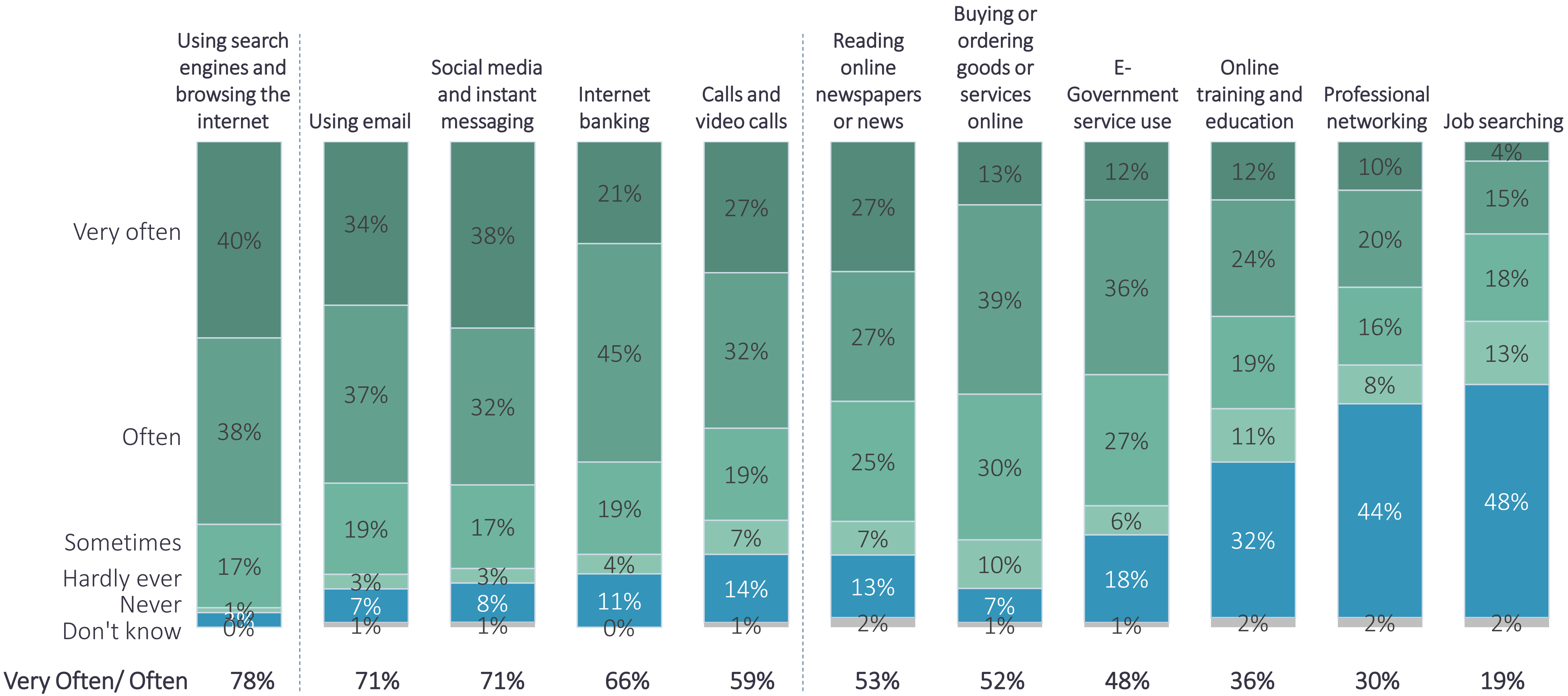


(Q.36)

(Base : All Telecoms Decision Makers With Access To Broadband; n=1,273)

Frequency of using broadband for different purposes

Search, email and social media are primary uses of home broadband



(Q.33)

(Base : All Telecoms Decision Makers With Access To Broadband; n=1,273)

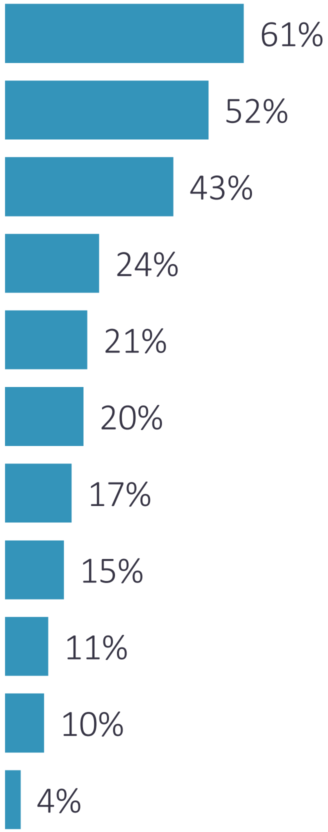
Frequency of using broadband for different purposes:
very often/often summary
Usage of broadband for calls/video calls higher in Dublin

		ComReg Region					National Region		Age		
		1 (n=220)	2 (n=271)	3 (n=192)	4 (n=188)	5 (n=402)	Dublin (n=331)	Rest Of Ireland (n=942)	18-34 (n=334)	35-54 (n=623)	55+ (n=316)
Using search engines and browsing the internet	78%	80%	86%	77%	71%	78%	77%	79%	91%	80%	62%
Using email	71%	59%	78%	53%	56%	75%	74%	69%	88%	73%	47%
Social media and instant messaging	71%	76%	77%	66%	62%	71%	69%	71%	94%	70%	45%
Internet banking	66%	57%	78%	53%	47%	68%	69%	64%	74%	69%	49%
Calls and video calls	59%	55%	67%	42%	54%	62%	69%	55%	74%	57%	47%
Reading online newspapers or news	53%	51%	76%	41%	43%	54%	55%	53%	56%	54%	49%
Buying or ordering goods or services online	52%	52%	64%	45%	53%	51%	49%	53%	68%	52%	34%
EGovernment service use	48%	33%	47%	27%	23%	55%	62%	40%	49%	51%	39%
Online training and education	36%	28%	36%	20%	23%	40%	47%	30%	42%	40%	20%
Professional networking	30%	21%	20%	16%	14%	36%	47%	21%	31%	35%	20%
Job searching	19%	19%	12%	11%	11%	23%	38%	10%	28%	20%	9%

(Q.33)

(Base : All Telecoms Decision Makers With Access To Broadband; n=1,273)

Frequency of using broadband for different purposes:
hardly ever/never summary
Low frequency usage is higher outside of Dublin



	ComReg Region					National Region		Age		
	1 (n=220)	2 (n=271)	3 (n=192)	4 (n=188)	5 (n=402)	Dublin (n=331)	Rest Of Ireland (n=942)	18-34 (n=334)	35-54 (n=623)	55+ (n=316)
Job searching	62%	65%	72%	63%	58%	44%	69%	38%	65%	78%
Professional networking	68%	56%	64%	70%	46%	29%	63%	47%	45%	70%
Online training and education	55%	40%	56%	53%	40%	28%	50%	35%	36%	67%
EGovernment service use	32%	27%	42%	35%	20%	7%	33%	21%	23%	30%
Calls and video calls	26%	17%	36%	27%	18%	3%	29%	13%	22%	27%
Reading online newspapers or news	34%	13%	30%	30%	18%	7%	26%	18%	21%	19%
Buying or ordering goods or services online	21%	13%	26%	10%	18%	19%	17%	6%	12%	41%
Internet banking	23%	11%	22%	24%	12%	5%	20%	5%	14%	26%
Social media and instant messaging	12%	16%	23%	12%	9%	7%	14%	1%	6%	33%
Using email	20%	6%	20%	14%	7%	1%	14%	2%	9%	18%
Using search engines and browsing the internet	5%	3%	12%	9%	2%	1%	6%	1%	2%	9%

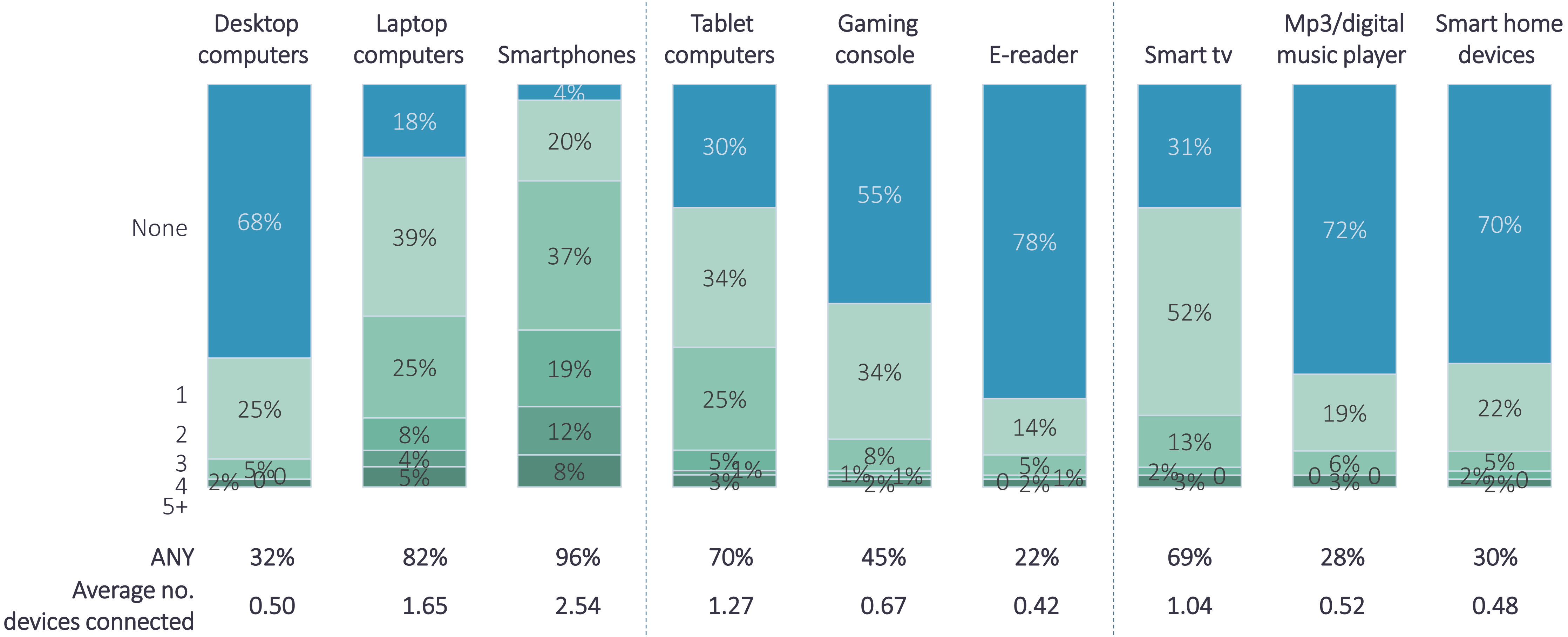
(Q.33)

(Base : All Telecoms Decision Makers With Access To Broadband; n=1,273)

Number of devices connected to home broadband

Smartphone ownership is almost universal

Majority of people also have access to at least 1 laptop, tablet and Smart TV connected to home broadband

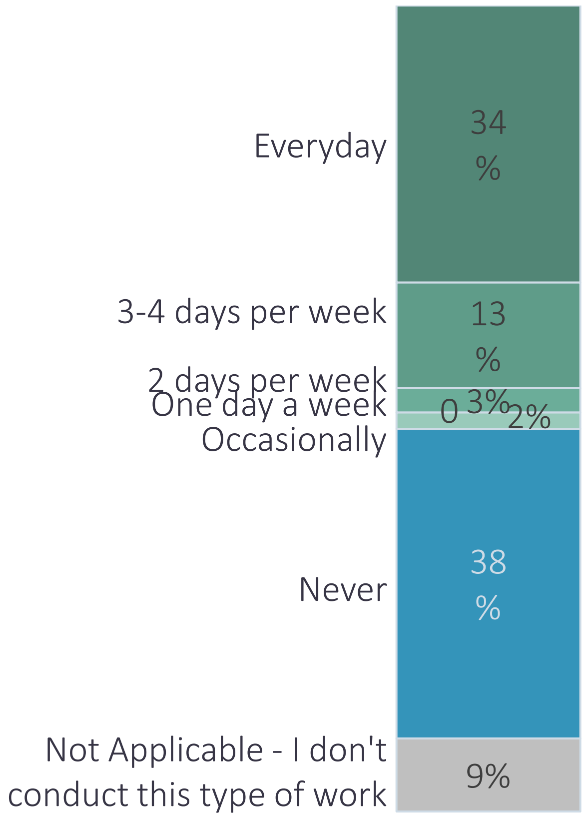


(Q.32)

(Base : All Telecoms Decision Makers With Access To Broadband; n=1,273)

Number of days working from home

74% of workers in Dublin are working from home most days



	ComReg Region					National Region		Age		
	1 (n=145)	2 (n=156)	3 (n=120)	4 (n=139)	5 (n=269)	Dublin (n=226)	Rest Of Ireland (n=603)	18-34 (n=220)	35-54 (n=499)	55+ (n=110)
Everyday	14%	19%	16%	10%	43%	53%	24%	35%	35%	27%
3-4 days per week	7%	20%	7%	5%	15%	21%	10%	10%	13%	18%
2 days per week	3%	4%	2%	3%	3%	4%	3%	3%	3%	3%
One day a week	*	0	*	*	*	1%	*	*	*	1%
Occasionally	1%	*	6%	5%	1%	1%	2%	2%	2%	1%
Never	59%	34%	57%	58%	33%	19%	48%	36%	39%	40%
Not Applicable - I don't conduct this type of work	15%	22%	12%	19%	6%	1%	14%	13%	8%	9%

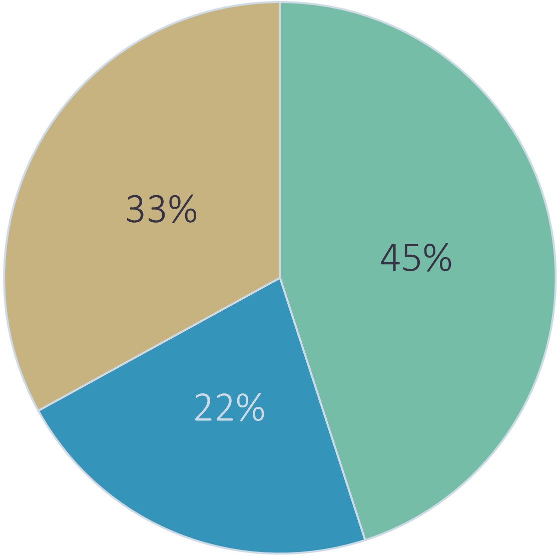
(Q.34)

(Base : All Telecoms Decision Makers With Broadband Working Full Or Part Time; n=829)

Broadband Switching & Faster Broadband Services

Would household benefit from faster internet broadband connection?

Benefit highest outside Dublin



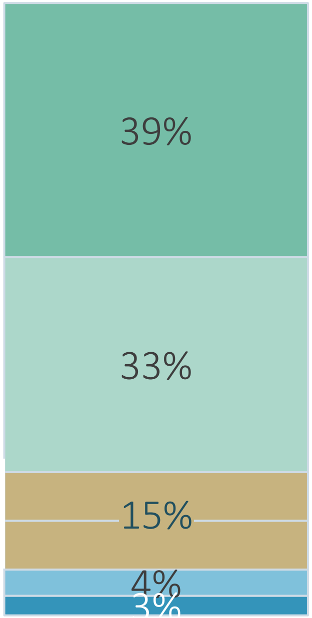
	ComReg Region					National Region		Age		
	1 (n=271)	2 (n=331)	3 (n=232)	4 (n=220)	5 (n=426)	Dublin (n=340)	Rest Of Ireland (n=1,140)	18-34 (n=358)	35-54 (n=672)	55+ (n=450)
Yes	47%	61%	42%	53%	42%	29%	51%	56%	50%	32%
No	20%	17%	30%	14%	22%	21%	22%	18%	15%	32%
Don't know	33%	22%	28%	32%	36%	50%	27%	26%	35%	36%

(Q.52)

(Base : All Telecoms Decision Makers; n=1480)

Likelihood to take up faster/high speed broadband if available in area

Stronger likelihood of uptake outside of Dublin



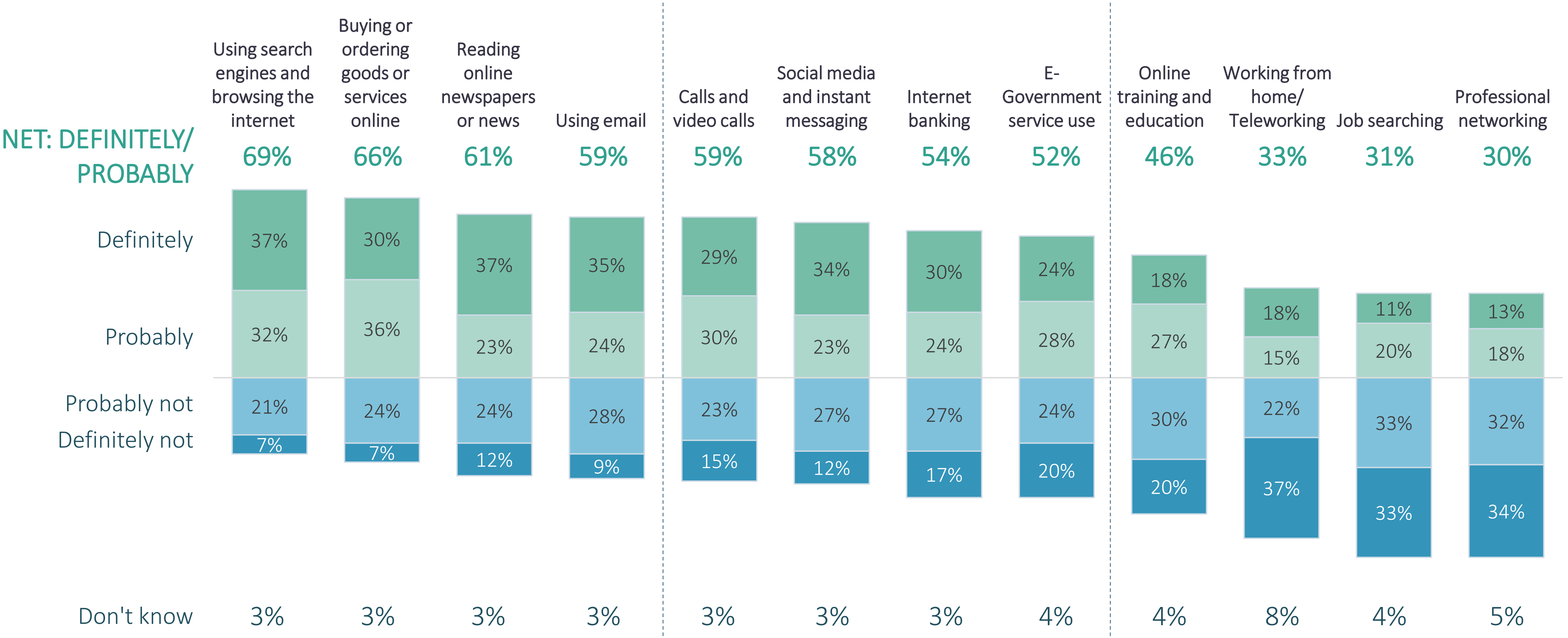
		ComReg Region					National Region		Age		
		1 (n=133)	2 (n=153)	3 (n=91)	4 (n=94)	5 (n=142)	Dublin (n=107)	Rest Of Ireland (n=506)	18-34 (n=161)	35-54 (n=316)	55+ (n=136)
Very likely	39%	52%	52%	45%	38%	35%	30%	41%	36%	42%	36%
Quite likely	33%	30%	35%	33%	32%	33%	33%	33%	36%	26%	43%
Neither likely nor unlikely	15%	10%	4%	16%	18%	17%	22%	13%	13%	18%	11%
Not very likely	4%	2%	*	0	*	7%	5%	4%	4%	3%	7%
Not at all likely	3%	*	6%	0	4%	3%	9%	2%	4%	4%	1%
Don't know	5%	5%	3%	6%	8%	5%	1%	6%	7%	6%	3%
NET: LIKELY	72%	82%	87%	78%	70%	67%	63%	74%	72%	69%	79%
NET: UNLIKELY	8%	3%	6%	0	4%	10%	14%	6%	8%	7%	8%

(Q.53)

(Base : All Who Would Benefit From Faster Broadband Connection; n=613)

Likelihood of using services more as a result of higher broadband speed

Browsing and shopping online most likely to increase

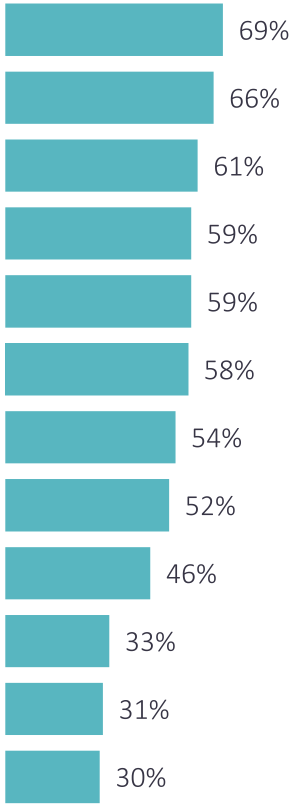


(Q.54)

(Base : All Users Of Any Service Who Would Benefit From Faster Broadband Connection; n=611)

Likelihood of using services more as a result of higher broadband speed: definitely/probably summary

People outside of Dublin are likely to see increase in service use



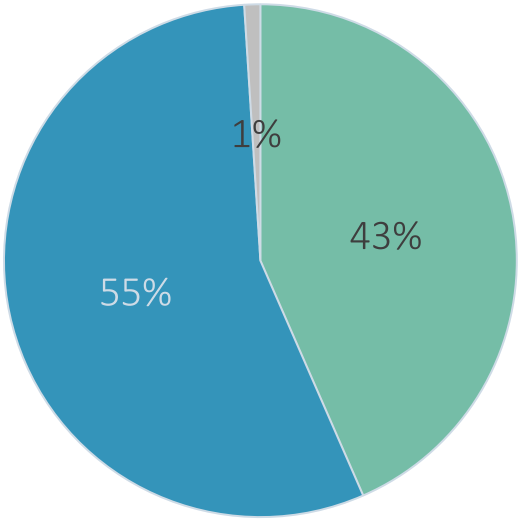
	ComReg Region					National Region		Age		
	1 (n=133)	2 (n=153)	3 (n=91)	4 (n=92)	5 (n=142)	Dublin (n=107)	Rest Of Ireland (n=504)	18-34 (n=161)	35-54 (n=314)	55+ (n=136)
Using search engines and browsing the internet	90%	83%	66%	83%	63%	37%	76%	69%	71%	67%
Buying or ordering goods or services online	85%	78%	54%	68%	66%	33%	74%	69%	66%	64%
Reading online newspapers or news	73%	80%	50%	67%	57%	38%	66%	64%	59%	62%
Using email	80%	80%	55%	78%	51%	32%	65%	63%	59%	55%
Calls and video calls	79%	79%	53%	64%	54%	40%	63%	72%	57%	47%
Social media and instant messaging	88%	69%	56%	66%	54%	38%	62%	66%	58%	48%
Internet banking	73%	82%	58%	59%	44%	32%	59%	56%	54%	51%
E-Government service use	64%	64%	41%	54%	51%	33%	57%	59%	49%	51%
Online training and education	56%	57%	36%	44%	45%	32%	49%	56%	45%	32%
Working from home/Teleworking	40%	39%	27%	35%	32%	34%	33%	41%	33%	23%
Job searching	40%	25%	30%	46%	29%	32%	30%	51%	25%	15%
Professional networking	40%	31%	28%	38%	29%	31%	30%	32%	32%	24%

(Q.54.2)

(Base : All Users Of Any Service Who Would Benefit From Faster Broadband Connection; n=611)

Incidence of having ever switched broadband provider

Broadband switching more likely outside of Dublin.



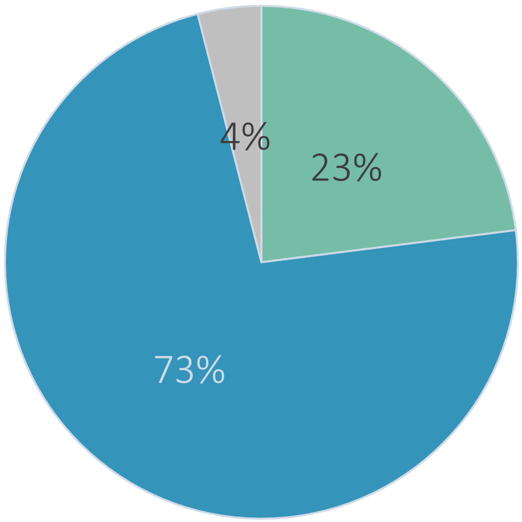
	ComReg Region					National Region		Age		
	1 (n=220)	2 (n=271)	3 (n=192)	4 (n=188)	5 (n=402)	Dublin (n=331)	Rest Of Ireland (n=942)	18-34 (n=334)	35-54 (n=623)	55+ (n=316)
Yes	37%	39%	44%	43%	44%	32%	49%	42%	50%	32%
No	61%	60%	56%	56%	54%	66%	50%	55%	50%	67%
Don't know	1%	*	0	1%	2%	2%	1%	3%	*	1%

(Q.28)

(Base : All Telecoms Decision Makers With Access To Broadband; n=1,273)

Incidence of ever upgrading broadband service from previous or with current supplier?

Dubliners are less likely to have upgraded their Broadband



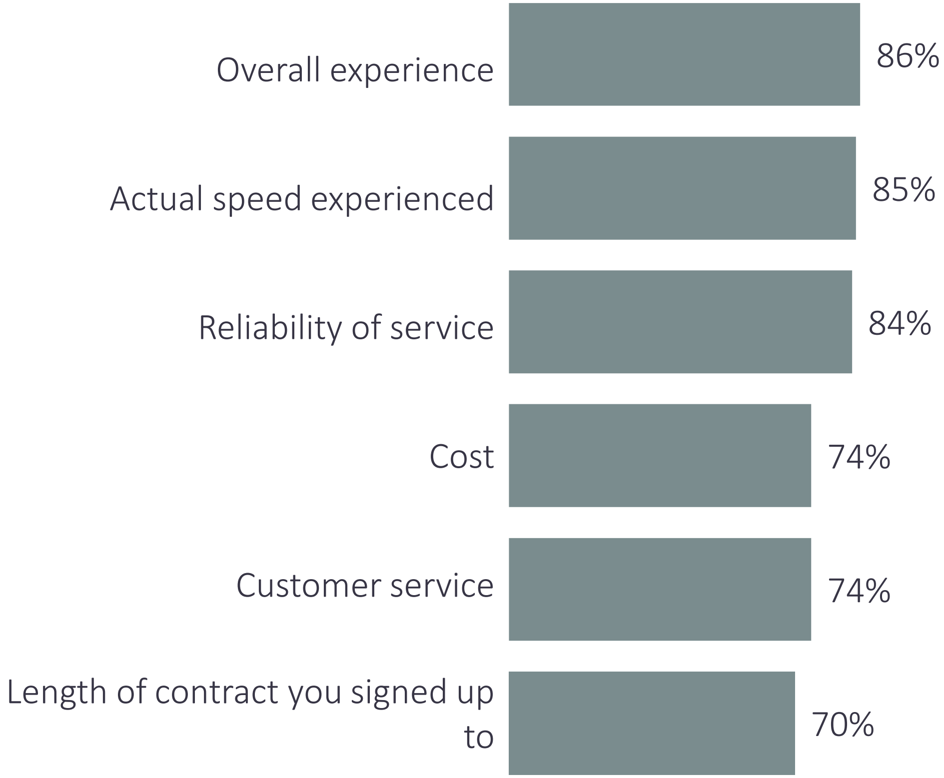
	ComReg Region					National Region		Age		
	1 (n=220)	2 (n=271)	3 (n=192)	4 (n=188)	5 (n=402)	Dublin (n=331)	Rest Of Ireland (n=942)	18-34 (n=334)	35-54 (n=623)	55+ (n=316)
Yes	18%	22%	27%	23%	22%	18%	25%	22%	29%	12%
No	79%	76%	69%	69%	74%	79%	70%	74%	66%	85%
Don't know	3%	2%	4%	8%	4%	3%	4%	4%	4%	3%

(Q.29)

(Base : All Telecoms Decision Makers With Access To Broadband; n=1,273)

Elements of broadband service that improved since switching provider
(regardless of timing of switch)

Dubliners most likely to say elements of Broadband have improved



	ComReg Region					National Region	
	1 (n=88)	2 (n=122)	3 (n=79)	4 (n=71)	5 (n=127)	Dublin (n=92)	Rest Of Ireland (n=395)
Overall experience	78%	90%	77%	77%	88%	95%	83%
Actual speed experienced	81%	88%	76%	87%	87%	93%	83%
Reliability of service	84%	86%	84%	83%	83%	93%	81%
Cost	88%	70%	68%	75%	76%	84%	71%
Customer service	62%	77%	67%	72%	76%	87%	70%
Length of contract you signed up to	63%	76%	60%	63%	72%	89%	64%

(Q.30)

(Base : All Telecoms Decision Makers Who Switched Broadband; n=487)

Likelihood to consider switching broadband in next 12 months (standalone broadband users (out of contract) only)

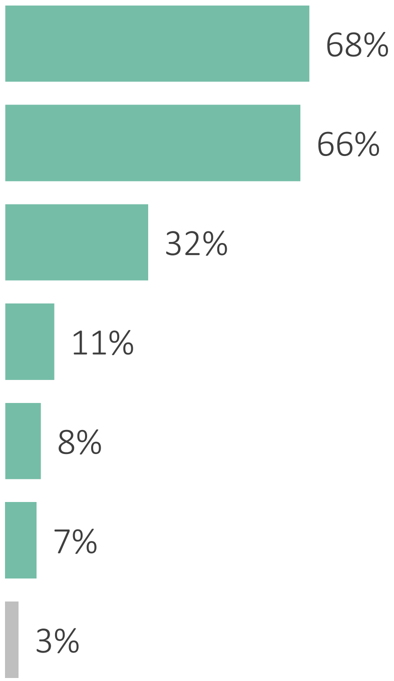
		ComReg Region					National Region		Age		
		1 (n=94)	2 (n=73)	3 (n=75)	4 (n=89)	5 (n=73)	* Small Sample Dublin (n=49*)	Rest Of Ireland (n=355)	18-34 (n=121)	35-54 (n=205)	55+ (n=78)
Very likely	9%	12%	22%	12%	5%	7%	*	11%	10%	6%	14%
Quite likely	21%	11%	24%	14%	10%	26%	*	25%	27%	20%	13%
Neither likely nor unlikely	17%	21%	3%	25%	25%	14%	33%	14%	10%	19%	23%
Not very likely	9%	16%	7%	11%	9%	8%	3%	10%	9%	7%	12%
Not at all likely	29%	23%	22%	28%	22%	32%	53%	25%	30%	32%	20%
Don't know	16%	17%	22%	11%	28%	13%	10%	17%	14%	17%	18%
NET: LIKELY	30%	23%	45%	26%	16%	33%	*	35%	38%	26%	27%
NET: UNLIKELY	37%	39%	29%	39%	32%	40%	56%	34%	39%	39%	32%

*Caution: Small Base Size
(Q.38)
(Base : All Telecoms Decision Makers With Access To Broadband Not As Part Of A Bundle And Not In Contract For Over 12 Months; n=404)

Landline Section

Reasons For Using A Landline

Dubliners less likely to make calls or to need landline to get BB



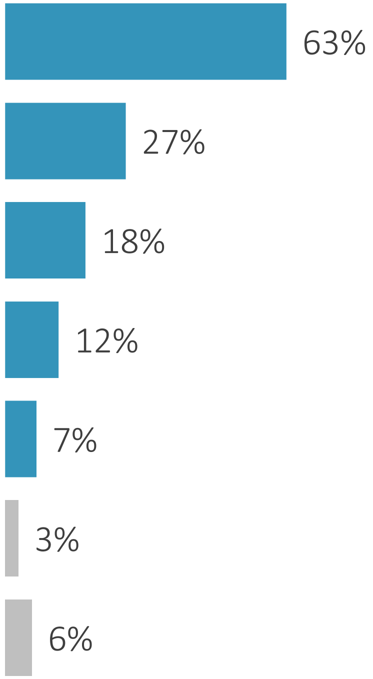
	ComReg Region					National Region		Age		
	1 (n=84)	2 (n=144)	3 (n=91)	4 (n=64)	5 (n=231)	Dublin (n=205)	Rest Of Ireland (n=409)	18-34 (n=116)	35-54 (n=259)	55+ (n=239)
To receive calls	43%	76%	61%	54%	70%	65%	71%	46%	62%	82%
To make calls	52%	74%	64%	48%	66%	59%	70%	44%	59%	80%
Required for access to broadband, but do not use it to make/receive calls (it is included in my bundle, but I do not use it)	37%	32%	33%	45%	30%	27%	36%	51%	36%	20%
For the feeling of security	14%	21%	19%	25%	7%	6%	15%	9%	6%	17%
Have not used it in the past 6 months (but have it)	15%	11%	14%	12%	6%	6%	10%	18%	11%	1%
Required for my alarm monitoring system to work	2%	21%	4%	12%	5%	3%	11%	5%	9%	7%
Other	0	2%	0	0	4%	7%	*	0	4%	4%

(Q.24)

(Base: All Telecoms Decision Makers Using Fixed Landline; n=614)

Reasons For Not Using A Landline

Outside of Dublin, using mobile phone instead is most likely



	ComReg Region		* Small Sample			National Region		Age		
	1 (n=44*)	2 (n=48*)	3 (n=44*)	4 (n=35*)	5 (n=87)	Dublin (n=85)	Rest Of Ireland (n=173)	18-34 (n=72)	35-54 (n=126)	55+ (n=60)
I use my mobile phone to make calls instead	79%	81%	80%	50%	60%	53%	75%	41%	79%	53%
I make calls from a computer, laptop, tablet or mobile smart phone using apps (e.g. via WhatsApp, Skype, Viber) instead	28%	8%	26%	42%	28%	22%	33%	30%	28%	24%
I use email or use the internet for social networking messaging (such as Facebook) or instant messaging instead	25%	6%	33%	37%	13%	17%	18%	18%	20%	13%
The cost of calls is too high	11%	8%	14%	15%	12%	11%	14%	20%	9%	12%
I do not need to make calls	3%	13%	2%	20%	6%	8%	7%	6%	7%	11%
Other	0	1%	1%	5%	3%	4%	1%	3%	*	7%
Don't know	0	0	0	0	8%	11%	0	19%	1%	2%

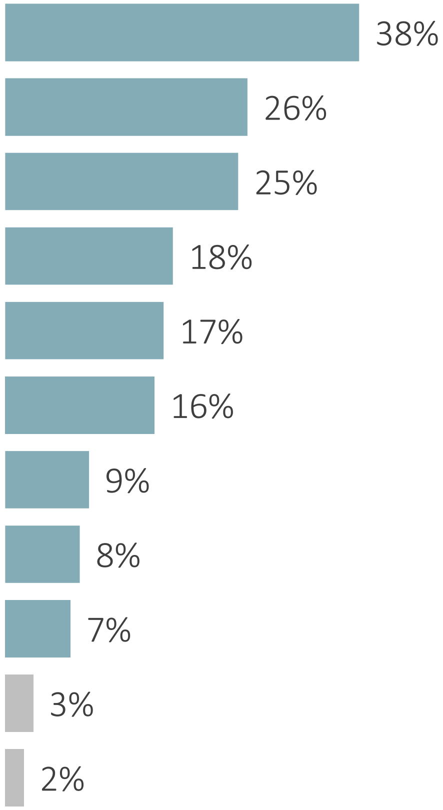
(Q.25)

(Base: All Telecoms Decision Makers Not Using Fixed Landline; n=258)

Reasons for owning a landline AND a mobile phone

Dubliners less likely to need to take a landline for their bundle

In addition, those outside Dublin also more likely to have landline for receiving calls from certain individuals and because quality of landline is superior to mobile phone during a phone call.



	Total	ComReg Region 1 (n=81)	ComReg Region 2 (n=139)	ComReg Region 3 (n=84)	ComReg Region 4 (n=60)	ComReg Region 5 (n=216)	National Region Dublin (n=192)	National Region Rest Of Ireland (n=388)	Age 18-34 (n=113)	Age 35-54 (n=253)	Age 55+ (n=214)
I purchased a bundle which requires a fixed landline	38%	48%	27%	55%	44%	35%	28%	45%	43%	43%	20%
The use of a phone in cases of emergency	26%	29%	39%	26%	40%	22%	24%	28%	13%	22%	36%
I have always had one	25%	14%	26%	23%	19%	26%	25%	25%	6%	20%	39%
For receiving calls from certain individuals, e.g. family	18%	10%	25%	20%	13%	17%	10%	24%	13%	13%	26%
It is cheaper to use landline for certain types of calls	17%	14%	11%	19%	22%	17%	19%	15%	14%	15%	21%
The quality of the landline during a call is better than a mobile phone	16%	25%	36%	23%	9%	12%	8%	23%	10%	18%	16%
I need a fixed landline for work reasons	9%	8%	9%	2%	5%	10%	15%	3%	10%	10%	6%
The phone is linked to my home alarm or personal safety device	8%	7%	6%	16%	10%	7%	9%	8%	6%	7%	11%
It is cheaper for our household to use a single fixed landline than multiple mobile phones	7%	3%	15%	14%	10%	4%	3%	10%	4%	6%	9%
Other	3%	0	1%	1%	1%	4%	3%	3%	3%	4%	1%
Don't know	2%	0	0	*	0	4%	2%	3%	2%	5%	0

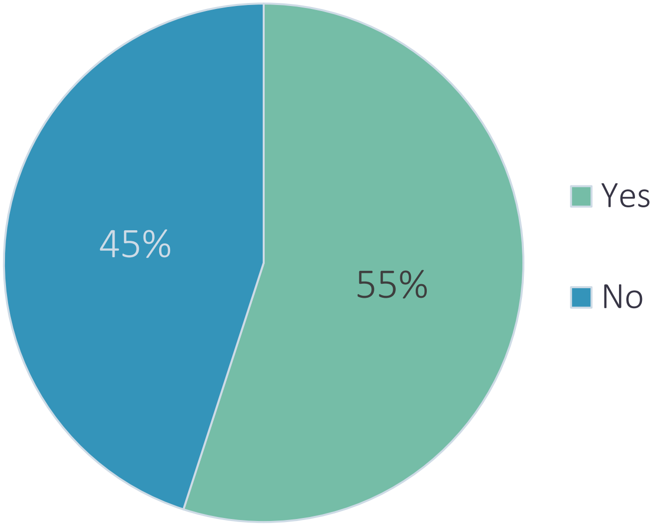
(Q.26)

(Base : All Telecoms Decision Makers With Both Fixed Landline & Mobile Phone; n=580)

Bundles & Contracts

Bundle ownership

Dubliners significantly more likely to own a bundle.



	ComReg Region					National Region	
	1 (n=255)	2 (n=301)	3 (n=214)	4 (n=215)	5 (n=415)	Dublin (n=336)	Rest Of Ireland (n=1,064)
Yes	41%	51%	31%	41%	63%	78%	45%
No	59%	49%	69%	55%	37%	22%	54%

	Age		
	18-34 (n=345)	35-54 (n=650)	55+ (n=405)
Yes	52%	61%	49%
No	48%	39%	50%

(Q.10)

(Base : All Telecoms Decision Makers; n=1400)

Type of bundle owned

TV Triple Play most popular in Dublin

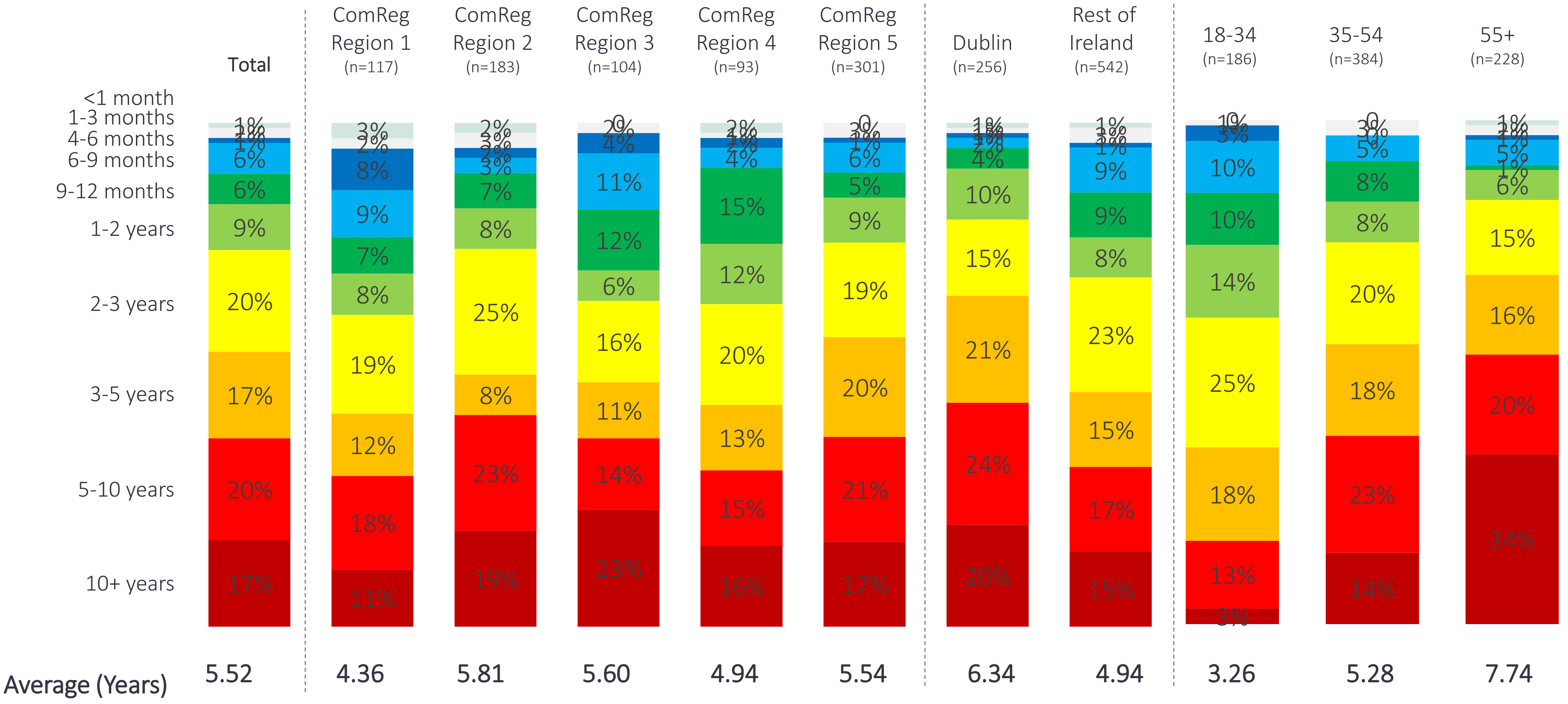
	Total	ComReg Region 1 (n=117)	ComReg Region 2 (n=183)	ComReg Region 3 (n=104)	ComReg Region 4 (n=93)	ComReg Region 5 (n=301)	National Region Dublin (n=256)	National Region Rest Of Ireland (n=542)	Age 18-34 (n=186)	Age 35-54 (n=384)	Age 55+ (n=228)
NET: TV Triple Play	28%	13%	11%	13%	3%	34%	41%	18%	23%	25%	36%
NET: TV/BB Dual Play	26%	22%	13%	21%	23%	28%	26%	25%	40%	26%	13%
NET: Landline/BB Dual Play	25%	44%	50%	54%	32%	18%	19%	30%	15%	26%	32%
NET: Quad Play	5%	2%	6%	6%	5%	5%	7%	4%	4%	7%	5%
NET: Mobile Phone Triple Play	2%	4%	7%	1%	4%	2%	3%	2%	2%	3%	2%
NET: Other Type	14%	14%	12%	5%	33%	13%	4%	20%	16%	14%	11%

(Q.11)

(Base : All Telecoms Decision Makers With A Bundle; n=798)

Length of time purchasing current bundle

Those in Dublin more likely to have bundle for 3+ years

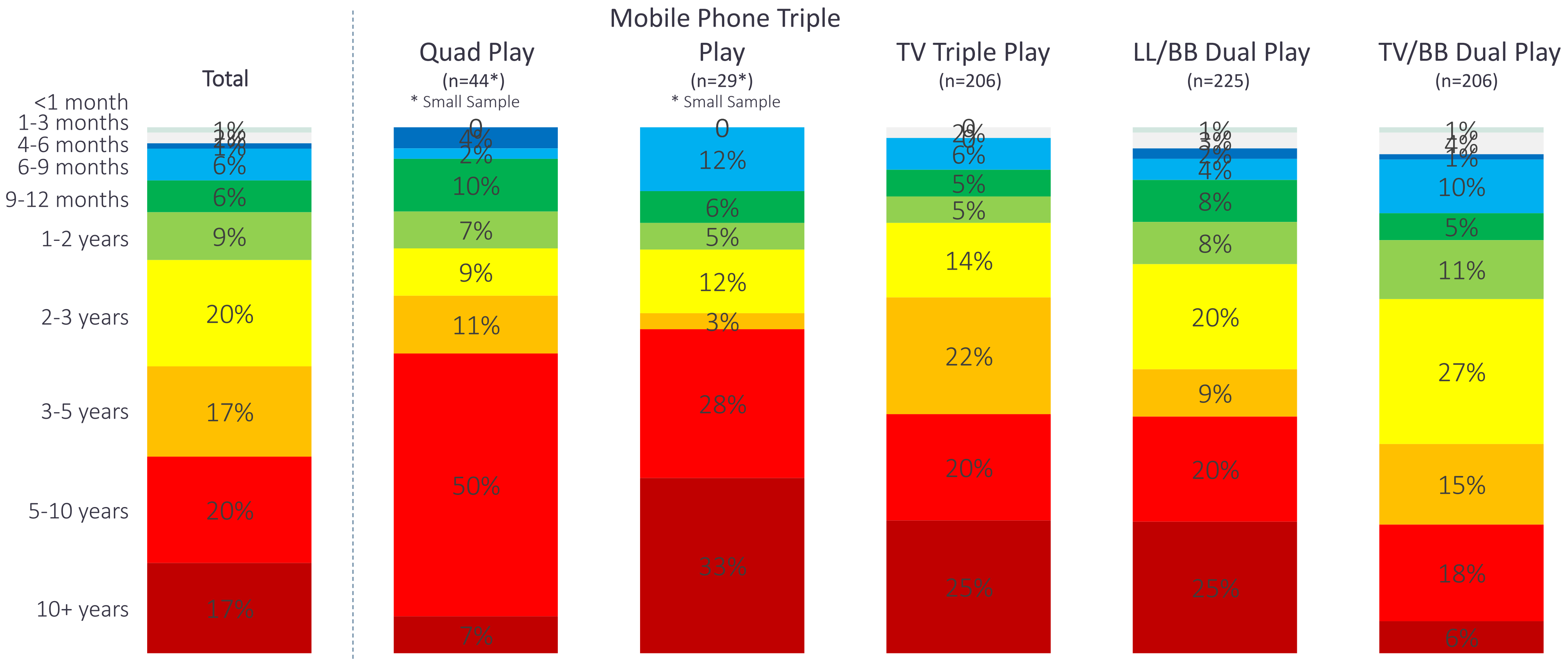


(Q.13)

(Base : All Telecoms Decision Makers With A Bundle; n=798)

Length of time purchasing current bundle

TV/BB Dual Play customers least likely to have bundle for 3+ years



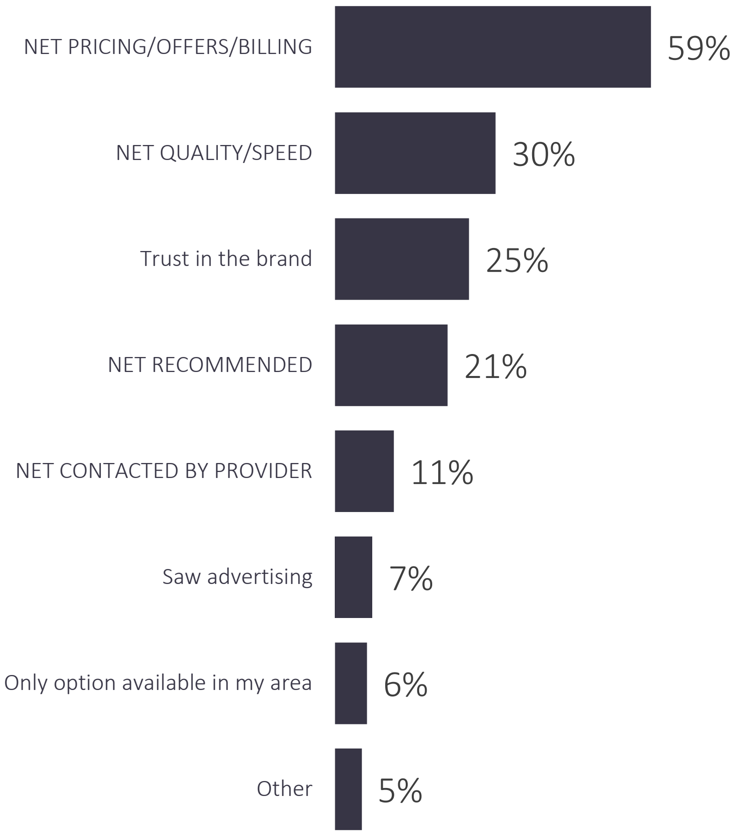
Average (Years)	5.52	5.63	7.77	6.69	6.35	3.84

(Q.13)

(Base : All Telecoms Decision Makers With A Bundle; n=798)

Reason for selecting specific bundle

Those outside Dublin more likely to choose due to quality/speed



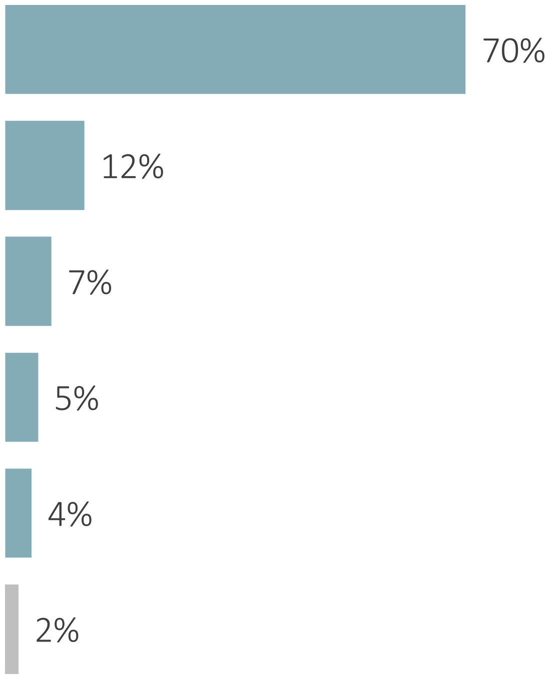
	ComReg Region					National Region		Age		
	1 (n=117)	2 (n=183)	3 (n=104)	4 (n=93)	5 (n=301)	Dublin (n=256)	Rest Of Ireland (n=542)	18-34 (n=186)	35-54 (n=384)	55+ (n=228)
NET PRICING/OFFERS/BILLING	61%	43%	65%	69%	59%	58%	59%	61%	59%	56%
NET QUALITY/SPEED	36%	49%	39%	60%	23%	15%	40%	31%	33%	23%
Trust in the brand	22%	16%	31%	36%	24%	34%	18%	26%	23%	26%
NET RECOMMENDED	25%	30%	28%	48%	16%	17%	23%	19%	25%	16%
NET CONTACTED BY PROVIDER	8%	15%	14%	23%	10%	11%	12%	10%	8%	19%
Saw advertising	4%	1%	2%	14%	7%	9%	5%	8%	4%	9%
Only option available in my area	11%	19%	14%	7%	4%	3%	9%	2%	7%	9%
Other	6%	2%	1%	0	6%	6%	4%	4%	3%	7%

(Q.14)

(Base : All Telecoms Decision Makers With A Bundle; n=798)

Most Important element of bundle

Internet most important across all regions in Ireland



	ComReg Region					National Region	
	1 (n=117)	2 (n=183)	3 (n=104)	4 (n=93)	5 (n=301)	Dublin (n=256)	Rest Of Ireland (n=542)
Fixed internet/broadband	75%	70%	71%	67%	71%	74%	68%
Paid or free TV	7%	7%	9%	3%	13%	16%	9%
Mobile phone	11%	17%	5%	20%	5%	1%	12%
Home landline telephone	5%	4%	14%	8%	4%	4%	6%
Mobile broadband	1%	0	0	2%	5%	0	6%
Other	1%	2%	0	*	3%	5%	*

(Q.15)

(Base : All Telecoms Decision Makers With A Bundle; n=798)

Most Important element of bundle

Fixed internet is consistently viewed as most important

		Type Of Bundle			Age		
		TV Triple Play (n=206)	LL/BB Dual Play (n=225)	TV/BB Dual Play (n=206)	18-34 (n=186)	35-54 (n=384)	55+ (n=228)
Fixed internet/broadband	70%	75%	85%	82%	75%	79%	51%
Paid or free TV	12%	20%	0	17%	10%	7%	21%
Mobile phone	7%	0	0	0	3%	9%	8%
Home landline telephone	5%	3%	13%	0	1%	1%	15%
Mobile broadband	4%	0	0	0	9%	3%	0
Other	2%	2%	2%	1%	2%	1%	4%

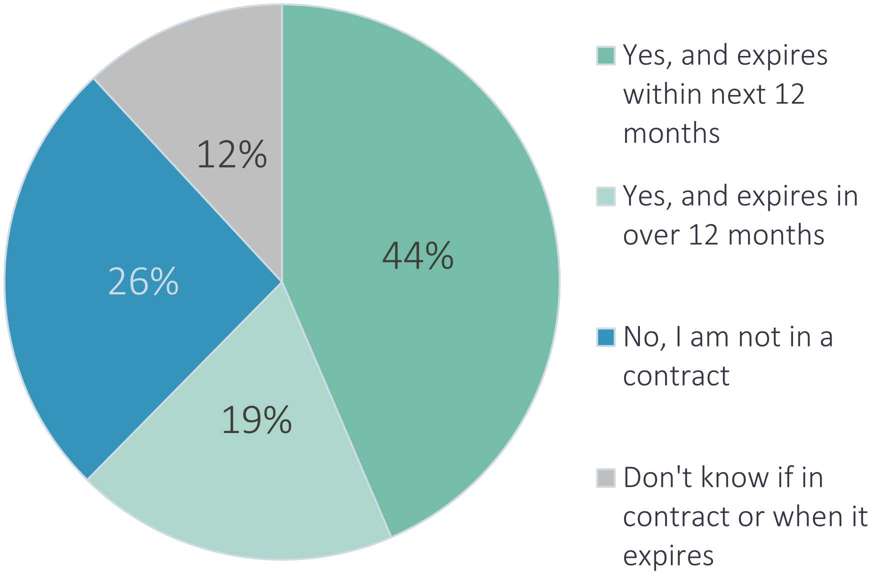
(Q.15)

(Base : All Telecoms Decision Makers With A Bundle; n=798)

Currently in a bundle contract

Those outside Dublin most likely to be in contract

Dubliners are more likely to either not be in contract or be in a long term contract which expires in over 12 months.



ANY YES – 62%

	ComReg Region					National Region	
	1 (n=117)	2 (n=183)	3 (n=104)	4 (n=93)	5 (n=301)	Dublin (n=256)	Rest Of Ireland (n=542)
Yes, and expires within next 12 months	68%	56%	68%	70%	36%	24%	57%
Yes, and expires in over 12 months	6%	24%	5%	8%	21%	30%	11%
No, I am not in a contract	16%	16%	16%	11%	30%	38%	18%
Don't know if in contract or when it expires	10%	4%	12%	11%	13%	8%	14%
ANY YES	74%	80%	72%	78%	57%	54%	68%

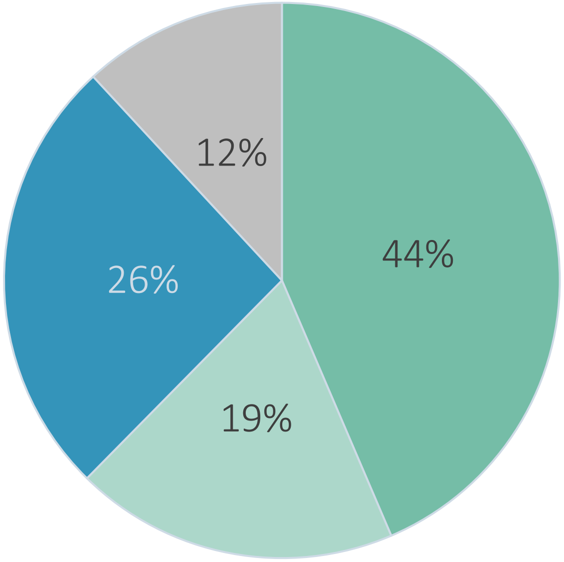
(Q.20b)

(Base All Telecoms Decision Makers With A Bundle; n=798)

Currently in a bundle contract

LL/BB and TV/BB dual play owners most likely to be in contract

There is a higher proportion of TV triple play owners either out of contract or in contract for more than 12 months.



ANY YES – 62%

	Type Of Bundle			Age		
	TV Triple Play (n=206)	LL/BB Dual Play (n=225)	TV/BB Dual Play (n=206)	18-34 (n=186)	35-54 (n=384)	55+ (n=228)
Yes, and expires within next 12 months	36%	53%	53%	55%	46%	30%
Yes, and expires in over 12 months	25%	13%	17%	20%	16%	21%
No, I am not in a contract	35%	22%	20%	16%	25%	37%
Don't know if in contract or when it expires	4%	11%	10%	9%	13%	11%
ANY YES	61%	67%	71%	76%	62%	52%

(Q.20b)

(Base All Telecoms Decision Makers With A Bundle; n=798)

Likelihood to consider switching bundle in next 12 months
(out of contract only)

Switch likelihood is almost 3 times higher outside of Dublin

	Total	ComReg Region 1 (n=111)	2 (n=165)	3 (n=94)	4 (n=86)	5 (n=225)	National Region Dublin (n=184)	Rest Of Leinster (n=497)
Very likely	8%	12%	14%	10%	4%	7%	2%	11%
Quite likely	12%	8%	16%	5%	13%	12%	7%	15%
Neither	19%	13%	4%	17%	15%	22%	16%	21%
Not very likely	15%	22%	10%	18%	18%	15%	10%	18%
Not at all likely	38%	31%	42%	37%	31%	39%	57%	27%
Don't know	8%	14%	14%	14%	19%	5%	8%	8%
NET: Likely	20%	20%	30%	14%	17%	20%	9%	26%
NET: Unlikely	53%	53%	52%	55%	49%	53%	67%	45%

(Q.21)

(Base : All Telecoms Decision Makers Who Own A Bundle And Not In Contract For Over 12 Months; n=681)

Likelihood to consider switching bundle in next 12 months

(out of contract only)

Limited difference in switch intention by bundle currently held

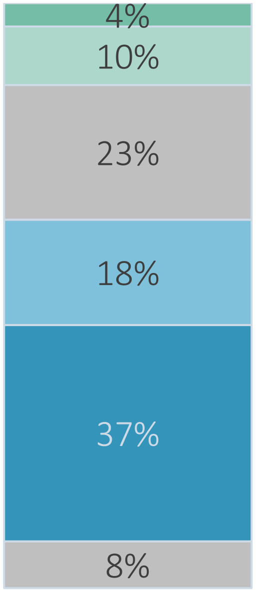
		Type Of Bundle			Age		
		TV Triple Play (n=166)	LL/BB Dual Play (n=206)	TV/BB Dual Play (n=177)	18-34 (n=160)	35-54 (n=327)	55+ (n=194)
Very likely	8%	8%	13%	3%	3%	9%	10%
Quite likely	12%	14%	9%	17%	23%	10%	7%
Neither	19%	8%	13%	13%	22%	19%	17%
Not very likely	15%	15%	17%	23%	14%	17%	12%
Not at all likely	38%	48%	34%	38%	29%	36%	49%
Don't know	8%	7%	14%	7%	9%	9%	6%
NET: Likely	20%	22%	22%	20%	26%	19%	17%
NET: Unlikely	53%	63%	51%	60%	43%	53%	60%

(Q.21)

(Base : All Telecoms Decision Makers Who Own A Bundle And Not In Contract For Over 12 Months; n=681)

Likelihood to consider buying a different bundle in next 12 months

Dubliners less likely to consider different set of services



	Total	ComReg Region 1 (n=117)	2 (n=183)	3 (n=104)	4 (n=93)	5 (n=301)	National Region Dublin (n=256)	Rest Of Ireland (n=542)
Very likely		9%	5%	5%	5%	3%	2%	5%
Quite likely		8%	9%	9%	11%	10%	7%	12%
Neither		12%	12%	17%	19%	26%	23%	24%
Not very likely		28%	19%	25%	12%	18%	12%	22%
Not at all likely		32%	32%	33%	28%	38%	50%	27%
Don't know		11%	23%	11%	25%	4%	6%	10%
NET: Likely	14%	16%	14%	14%	16%	13%	9%	17%
NET: Unlikely	54%	60%	52%	58%	40%	56%	62%	49%

(Q.22)

(Base: All Telecoms Decision Makers Who Own A Bundle; n=798)

Likelihood to consider buying a different bundle in next 12 months

Those with TV Triple Play or TV/BB unlikely to consider new services

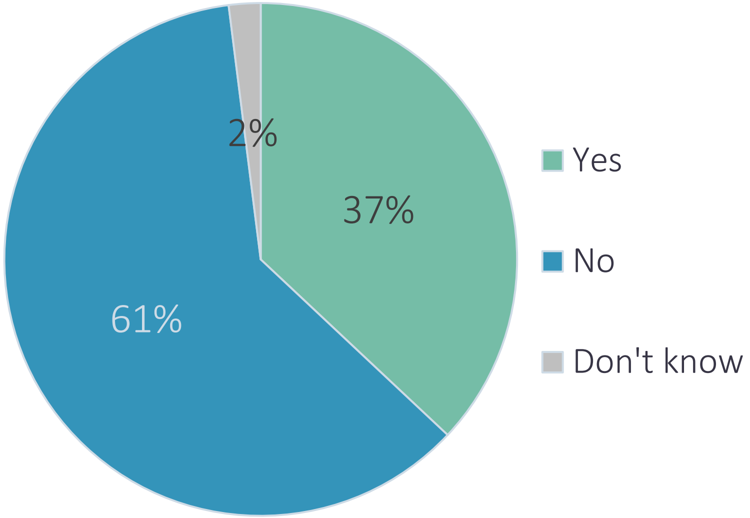
	Total	Type Of Bundle: TV Triple Play (n=206)	Type Of Bundle: LL/BB Dual Play (n=225)	Type Of Bundle: TV/BB Dual Play (n=206)	Age: 18-34 (n=186)	Age: 35-54 (n=384)	Age: 55+ (n=228)
Very likely	4%	3%	7%	2%	1%	6%	2%
Quite likely	10%	8%	7%	9%	17%	9%	6%
Neither	23%	16%	17%	25%	25%	24%	22%
Not very likely	18%	17%	21%	26%	20%	20%	13%
Not at all likely	37%	50%	31%	34%	28%	35%	46%
Don’t know	8%	6%	17%	5%	9%	6%	11%
NET: Likely	14%	11%	14%	11%	18%	15%	8%
NET: Unlikely	54%	67%	51%	60%	48%	55%	59%

(Q.22)

(Base: All Telecoms Decision Makers Who Own A Bundle; n=798)

Previous Bundle Purchase

Previously purchased a bundle with different supplier



	ComReg Region					National Region		Age		
	1 (n=117)	2 (n=183)	3 (n=104)	4 (n=93)	5 (n=301)	Dublin (n=256)	Rest Of Ireland (n=542)	18-34 (n=186)	35-54 (n=384)	55+ (n=228)
	50%	34%	32%	27%	39%	36%	38%	43%	38%	32%
	49%	66%	68%	72%	59%	62%	61%	55%	60%	67%
	1%	0	0	1%	2%	3%	1%	2%	2%	1%

(Q.12)

(Base : All Telecoms Decision Makers With A Bundle; n=798)

Who started the discussion to switch bundle?

55+ most likely to mention getting best deal when contract ended

Vast majority of cases, switching bundles was customer led.

	Total	Age 18-34 (n=80)	Age 35-54 (n=162)	Age 55+ (n=90)
I did or a member of my family did (no reason given)	54%	52%	54%	54%
I did or a member of my family did - to get the best offer from my service provider when my contract ended	20%	22%	15%	28%
I did or a member of my family did - to upgrade or add a new service	9%	4%	13%	5%
The operator did - they offered me a promotion/ offering to switch package	7%	4%	9%	8%
I did or a member of my family did - to downgrade or remove a service I previously paid for	3%	6%	4%	0
The operator did - they sought to retain me as a customer as my contract expired	1%	0	3%	0
The operator did - my existing package/bundle/service was no longer being offered	1%	0	2%	0

(Q.16)

(Base : All Telecoms Decision Makers Who Changed From An Old To A New Bundle; n=332)

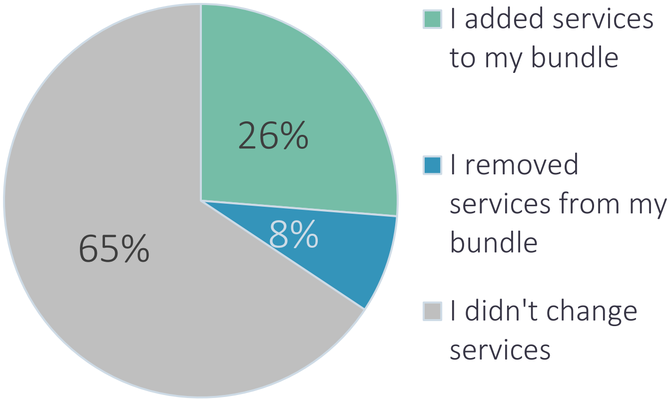
Changed services or not when switched

Those in Dublin least likely to have added a service

*Caution: Small Base Size

(Q.17a)

(Base : All Telecoms Decision Makers Who Changed From An Old To A New Bundle; n=332)



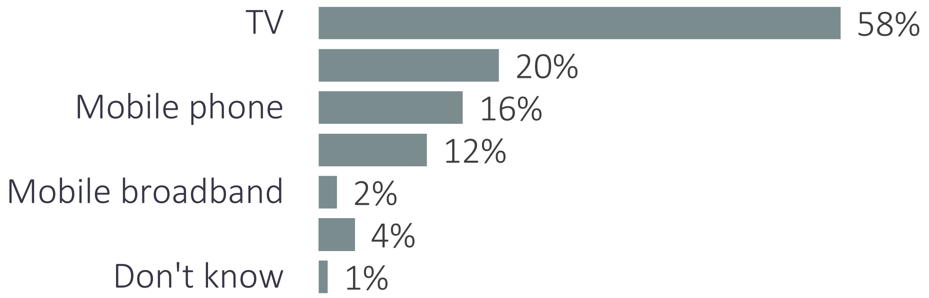
	ComReg Region					National Region		Age		
	1 (n=60)	2 (n=84)	3 (n=44*)	4 (n=32*)	5 (n=112)	Dublin (n=89)	Rest Of Ireland (n=243)	18-34 (n=80)	35-54 (n=162)	55+ (n=90)
I added services to my bundle	32%	31%	23%	38%	25%	19%	31%	38%	25%	15%
I removed services from my bundle	5%	11%	20%	1%	8%	7%	9%	4%	14%	1%
I didn't change services	63%	57%	57%	60%	67%	74%	59%	58%	60%	83%

* Small Sample

Services added to bundle

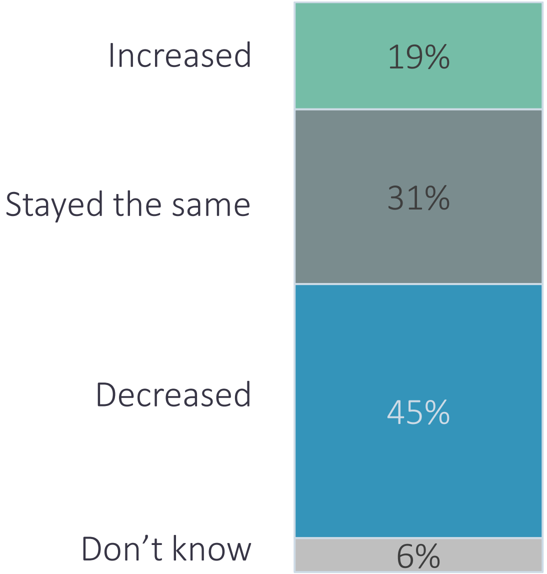
(Q.17b)

(Base : All Telecom Decision Makers Who Added A Service When They Switched Bundles; n=95)



Change in monthly bill moving from previous to current bundle supplier?

Those outside Dublin more likely to have monthly bill reduced



	ComReg Region					National Region	
				* Small Sample			
	1 (n=60)	2 (n=84)	3 (n=44*)	4 (n=32*)	5 (n=112)	Dublin (n=89)	Rest Of Ireland (n=243)
Increased	19%	21%	12%	20%	19%	20%	18%
Stayed the same	32%	16%	16%	42%	33%	53%	16%
Decreased	45%	59%	70%	36%	42%	21%	61%
Don’t know	3%	4%	1%	2%	6%	6%	6%

*Caution: Small Base Size

(Q.18)

(Base : All Telecoms Decision Makers Who Changed From An Old To A New Bundle; n=332)

Change in monthly bill when switching bundle

TV Triple Play bundle owners less likely to have seen decreased bill

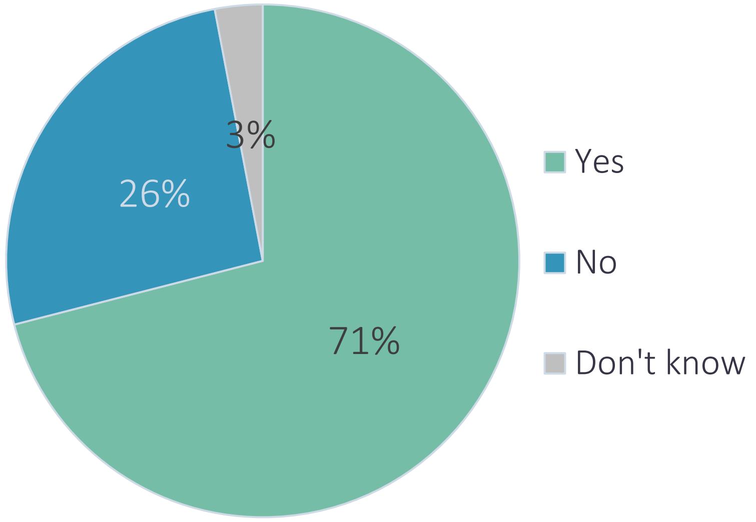
Half of current dual play bundle holders had a decreased monthly bill when they switched from old to new bundle.

		Type of Bundle			Age		
		TV Triple Play (n=88)	LL/BB Dual Play (n=91)	TV/BB Dual Play (n=96)	18-34 (n=80)	35-54 (n=162)	55+ (n=90)
Increased	19%	19%	17%	10%	19%	15%	26%
Stayed the same	31%	40%	25%	30%	30%	30%	33%
Decreased	45%	39%	54%	50%	47%	47%	40%
Don’t know	6%	2%	4%	10%	5%	8%	2%

(Q.18)

(Base : All Telecoms Decision Makers Who Changed From An Old To A New Bundle; n=332)

Incidence of comparing bundles in market before switching?



	ComReg Region					National Region	
				* Small Sample			
	1 (n=60)	2 (n=84)	3 (n=44*)	4 (n=32*)	5 (n=112)	Dublin (n=89)	Rest Of Ireland (n=243)
Yes	58%	77%	65%	37%	73%	72%	70%
No	35%	18%	35%	56%	24%	23%	28%
Don't know	7%	5%	0	7%	3%	5%	2%

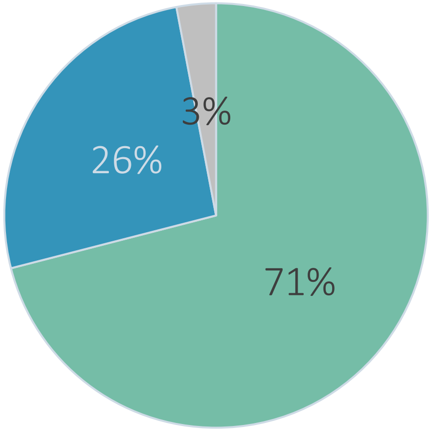
*Caution: Small Base Size

(Q.19)

(Base : All Telecoms Decision Makers Who Changed From An Old To A New Bundle; n=332)

Incidence of bundle comparison before switching

TV Triple Play customers most likely to have compared bundles



	Type Of Bundle					Age		
	* Small Sample Quad Play (n=16*)	Mobile Phone Triple Play (n=14*)	TV Triple Play (n=88)	LL/BB Dual Play (n=91)	TV/BB Dual Play (n=96)	18-34 (n=80)	35-54 (n=162)	55+ (n=90)
Yes	83%	51%	87%	70%	63%	70%	68%	78%
No	17%	49%	9%	29%	33%	24%	30%	20%
Don't know	0	0	4%	1%	3%	6%	2%	2%

*Caution: Small Base Size

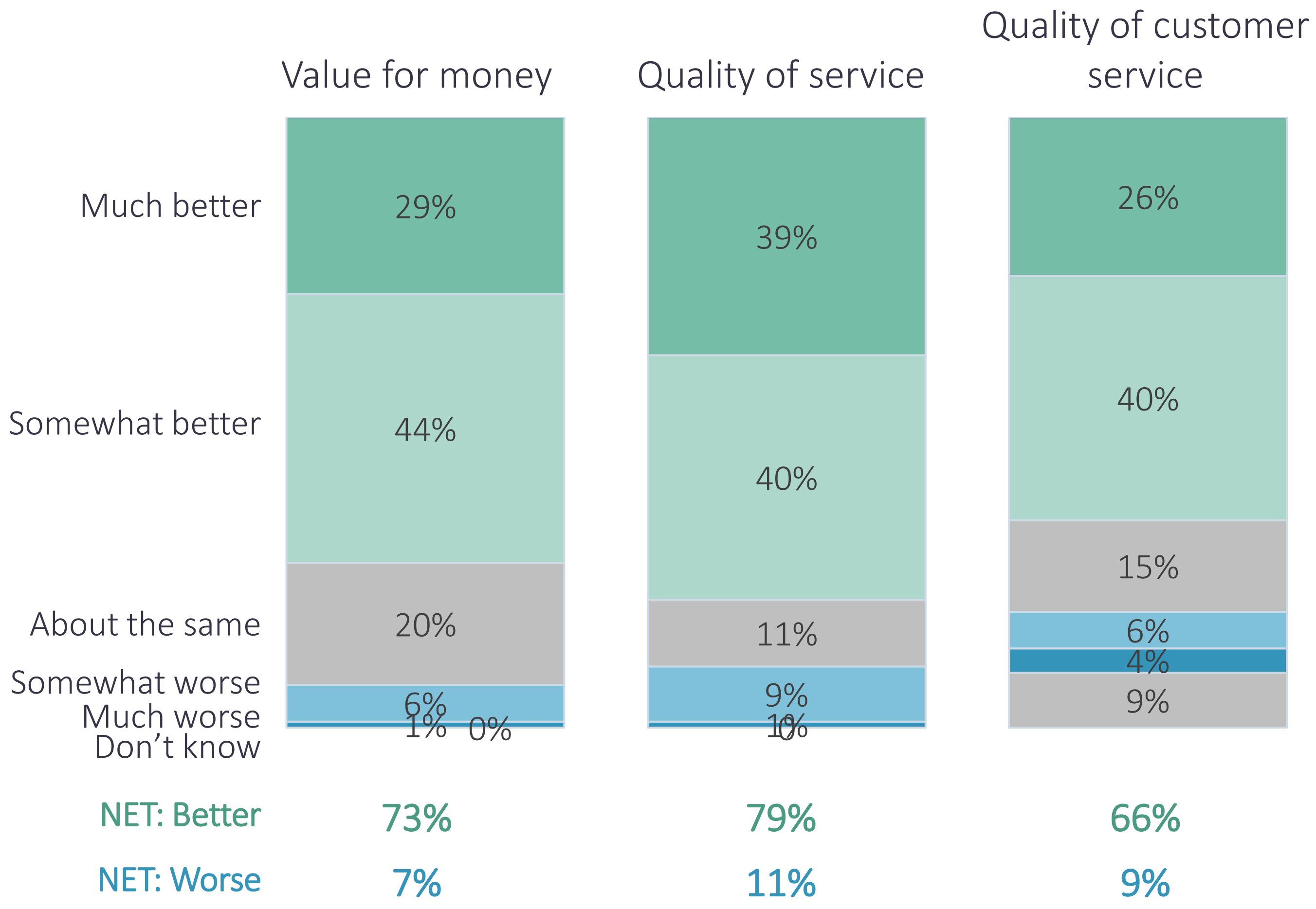
(Q.19.3)

(Base : All Telecoms Decision Makers Who Changed From An Old To A New Bundle; n=332)

How has experience changed since switched to current bundle…

Most customers are happy that value and service has improved

73% say VFM is better since switching while 79% say they now have better quality service. 66% also say the quality of customer service is better since changing bundle.



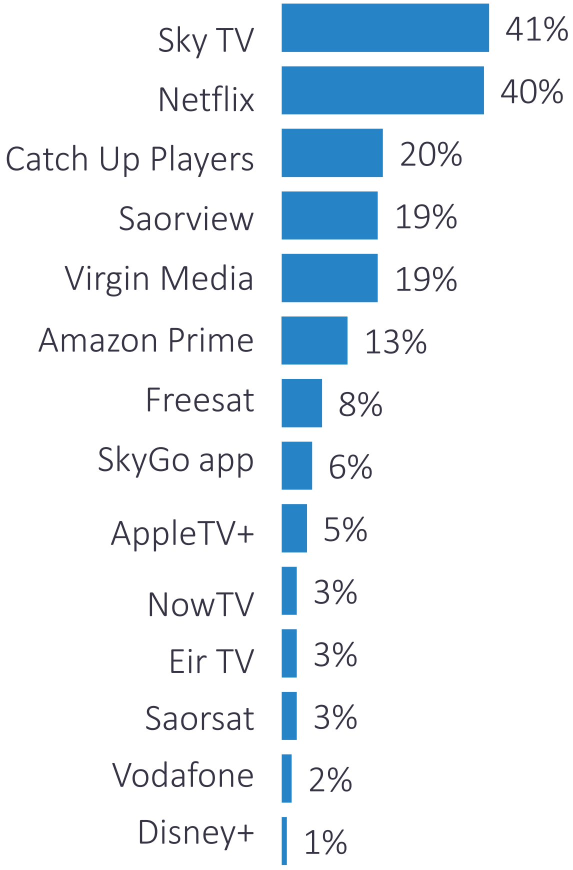
(Q.20)

(Base : All Telecoms Decision Makers Who Changed From An Old To A New Bundle; n=332)

TV Services

Usage of TV services

Usage of Sky, Netflix, and catch up players highest outside Dublin



	ComReg Region					National Region		Age		
	1 (n=205)	2 (n=234)	3 (n=164)	4 (n=155)	5 (n=356)	Dublin (n=294)	Rest Of Leinster (n=820)	18-34 (n=249)	35-54 (n=516)	55+ (n=349)
Sky TV	56%	51%	51%	66%	33%	28%	46%	47%	45%	32%
Netflix	32%	46%	31%	40%	41%	25%	46%	62%	46%	18%
Catch Up Players	12%	26%	11%	6%	23%	5%	26%	18%	25%	14%
Saorview	37%	42%	43%	41%	6%	4%	26%	8%	12%	35%
Virgin Media	*	5%	3%	3%	27%	56%	2%	18%	21%	17%
Amazon Prime	8%	6%	4%	7%	17%	18%	11%	21%	17%	3%
Freesat	10%	2%	9%	6%	9%	3%	10%	*	10%	10%
SkyGo app	6%	9%	4%	4%	6%	3%	7%	8%	7%	3%
AppleTV+	4%	1%	4%	1%	6%	4%	5%	5%	7%	2%
NowTV	7%	3%	1%	2%	4%	2%	4%	5%	4%	1%
Eir TV	2%	1%	2%	2%	4%	4%	3%	2%	2%	6%
Saorsat	3%	4%	8%	1%	2%	*	4%	1%	*	7%
Vodafone	1%	2%	0	0	2%	1%	2%	1%	3%	1%
Disney+	0	*	2%	0	1%	0	1%	0	2%	0

(Q.39)

(Base : All Telecoms Decision Makers With Access To TV; n=1114)

Devices used to watch TV services

Usage of Smart TV is almost universal in Dublin

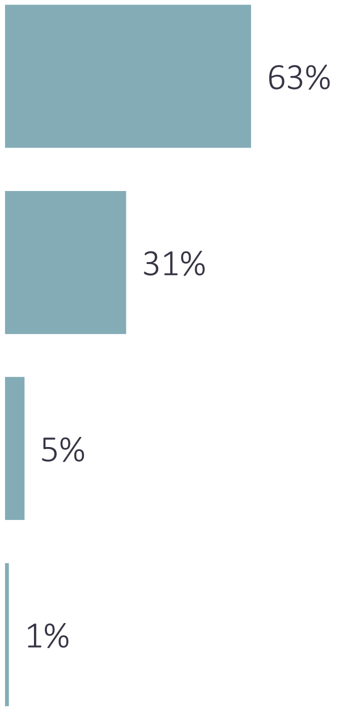
	Total	ComReg Region 1 (n=205)	2 (n=229)	3 (n=163)	4 (n=153)	5 (n=353)	National Region Dublin (n=292)	Rest Of Ireland (n=811)	Age 18-34 (n=245)	35-54 (n=514)	55+ (n=344)
Smart TV	66%	44%	49%	40%	54%	76%	92%	54%	76%	75%	48%
Traditional TV	37%	59%	61%	65%	49%	25%	8%	50%	19%	34%	52%
Mobile phone	12%	4%	16%	7%	2%	15%	9%	14%	21%	14%	5%
Laptop	10%	8%	12%	4%	5%	12%	12%	10%	18%	13%	3%
Tablet/iPad	6%	2%	8%	9%	1%	6%	2%	8%	11%	9%	1%
Desktop PC	1%	*	*	1%	*	1%	1%	1%	3%	1%	*

(Q.40)

(Base : All Using A TV Service; n=1103)

Device used to watch TV services most often

Highest use of smart TV in Dublin



	ComReg Region					National Region		Age		
	1 (n=205)	2 (n=229)	3 (n=163)	4 (n=153)	5 (n=353)	Dublin (n=292)	Rest Of Ireland (n=811)	18-34 (n=245)	35-54 (n=514)	55+ (n=344)
Smart TV	42%	48%	40%	54%	73%	89%	52%	72%	73%	46%
Traditional TV	57%	51%	60%	46%	19%	8%	41%	15%	22%	52%
Mobile phone	0	1%	*	*	7%	1%	7%	9%	5%	2%
Laptop	*	1%	*	*	1%	3%	*	4%	*	0

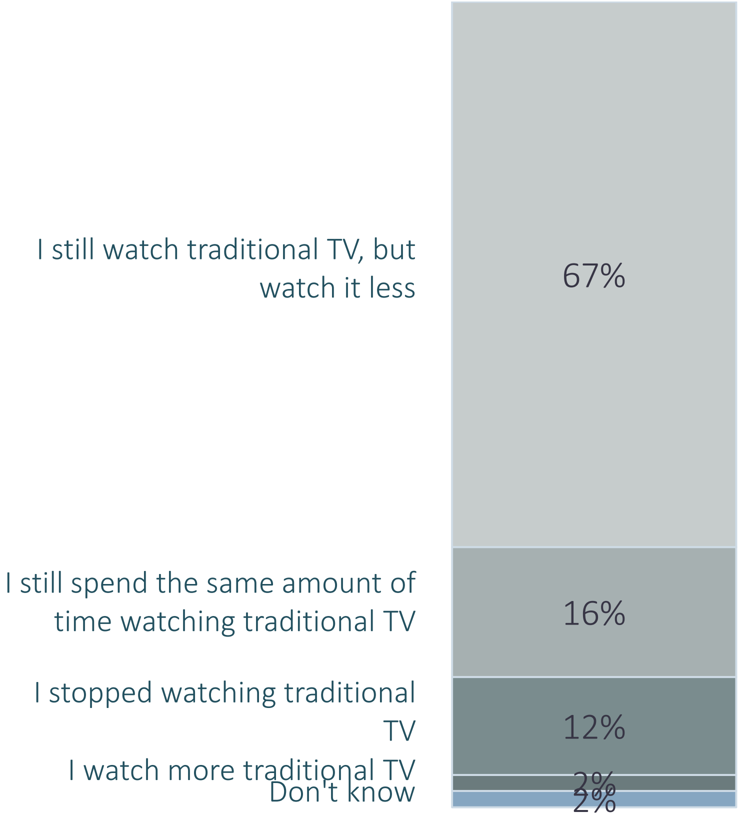
(Q.41)

(Base : All Using A TV Service; n=1103)

Note: Other Devices <1%

Impact of streaming on traditional scheduled TV

Incidence of watching less TV highest outside Dublin



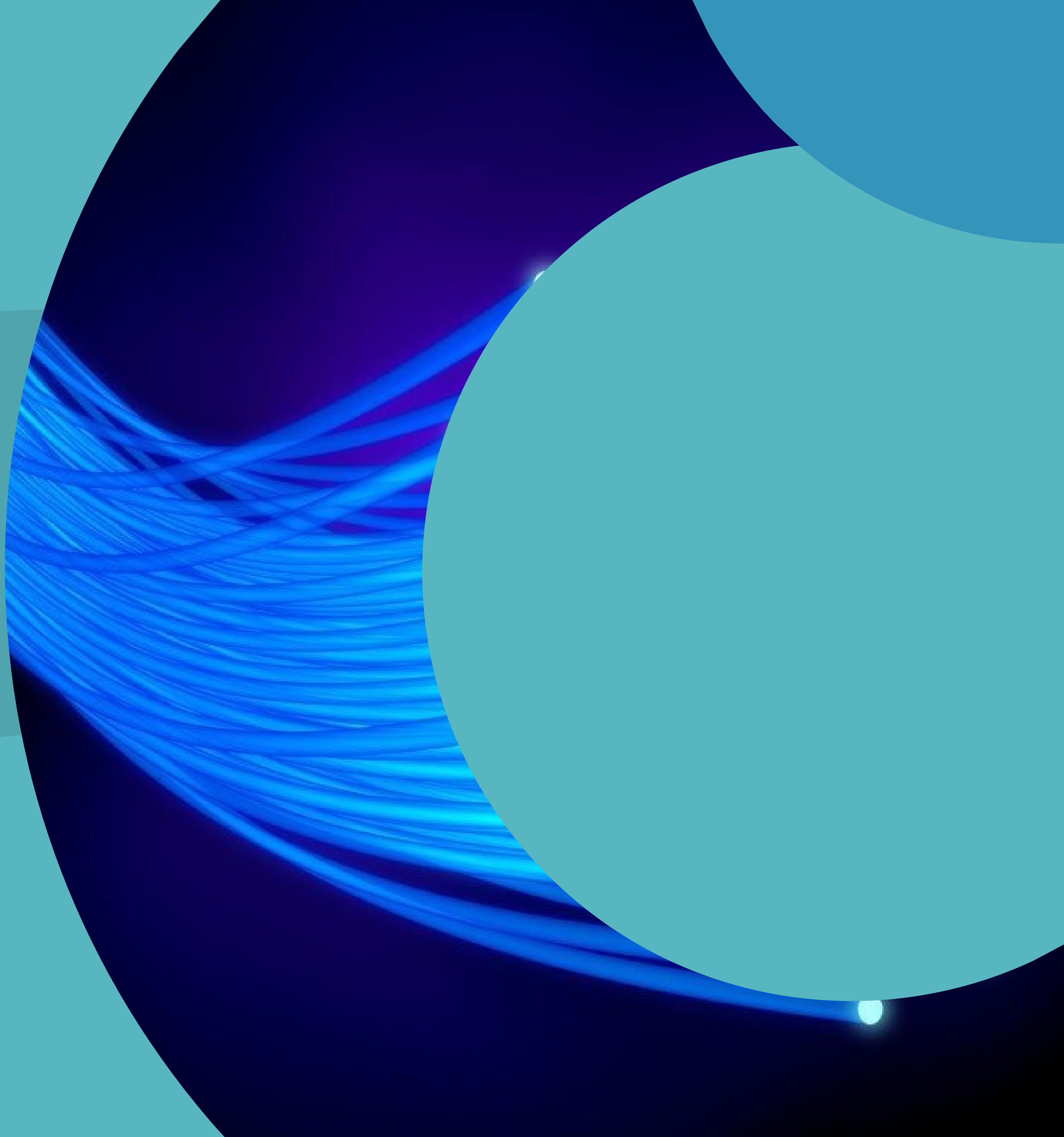
ComReg Region					National Region		Age		
1 (n=92)	2 (n=149)	3 (n=94)	4 (n=80)	5 (n=138)	Dublin (n=90)	Rest Of Ireland (n=463)	18-34 (n=161)	35-54 (n=290)	55+ (n=102)
67%	70%	52%	55%	70%	56%	70%	63%	69%	68%
22%	24%	39%	23%	10%	9%	18%	13%	16%	21%
7%	5%	3%	16%	15%	20%	10%	20%	10%	8%
4%	1%	3%	3%	2%	6%	1%	2%	2%	1%
0	0	2%	3%	3%	9%	1%	2%	3%	2%

(Q.42)

(Base : All Telecoms Decision Makers With Access To TV Who Use Streaming/Catch Up Services; n=553)

6

Key Findings



Key Findings

1. Broadband – Current Ownership and Faster Services

- **Importance**: 79% say home broadband is very important. 95% of those working from home say home broadband is very important.
- **Trust in a brand** is a key reason why consumers are with their current broadband supplier. **Promised speed of internet connection** is also a reason why 1 in 4 choose their current supplier.
- **Faster Broadband Service**: 45% of people consider they would benefit from a faster broadband connection. 72% likely to take up high speed broadband if it becomes available. This figure is highest in least populated areas of the country.

2. Satisfaction & Experience

- **Satisfaction:** 74% of broadband users are satisfied with their overall experience. Satisfaction tends to be higher for billing process and length of contract than speed of broadband and customer service. Satisfaction tends to be higher among Dublin residents.
- **Most common issues** experienced are slow/variable speeds and quality of internet connection.

3. Bundling & Switching

- **Services in a Bundle**: 55% of the population have a bundle of services in their home. This figure is higher in Dublin and more urban areas.
- **Switching Behaviour**: 1 in 5 bundle owners who are out of contract or contract expires within 12 months state they are likely to switch bundle within the next 12 months. 45% of those who switched bundles previously now have a lower bill within the current bundle. 71% of those who switched bundles compared bundles before making the switch. 43% of those with a broadband service have ever switched broadband supplier.
- **Satisfaction with Switching**: Overall, the vast majority of people who have switched broadband provider have seen an improvement in overall experience, download speeds and reliability. The majority of those who switched their broadband service are happier with their current service provider.