



An Coimisiún um
Rialáil Cumarsáide
Commission for
Communications Regulation

Study on the Impact of Covid-19 on Home Broadband and Mobile Service Usage

November 2020

ComReg Document 21/06

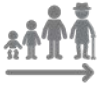


RESEARCH
& INSIGHT



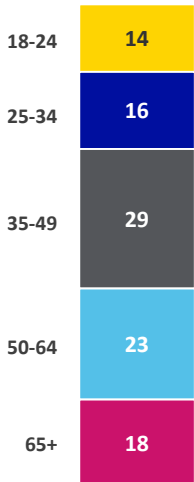
Methodology and Sample Profile

- The sample is quota controlled by gender, age, social class, region to match the known demographics of the population (CSO estimates), and is administered online to a sample of 1,013 adults.
- Online fieldwork on this project was undertaken between 12th – 25th November 2020.



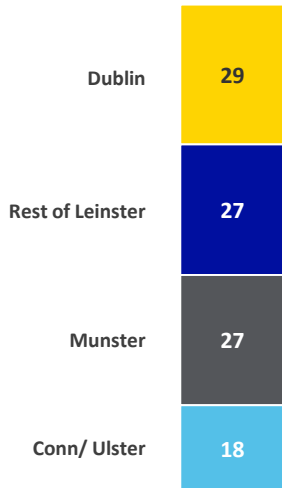
Age

All respondents
%



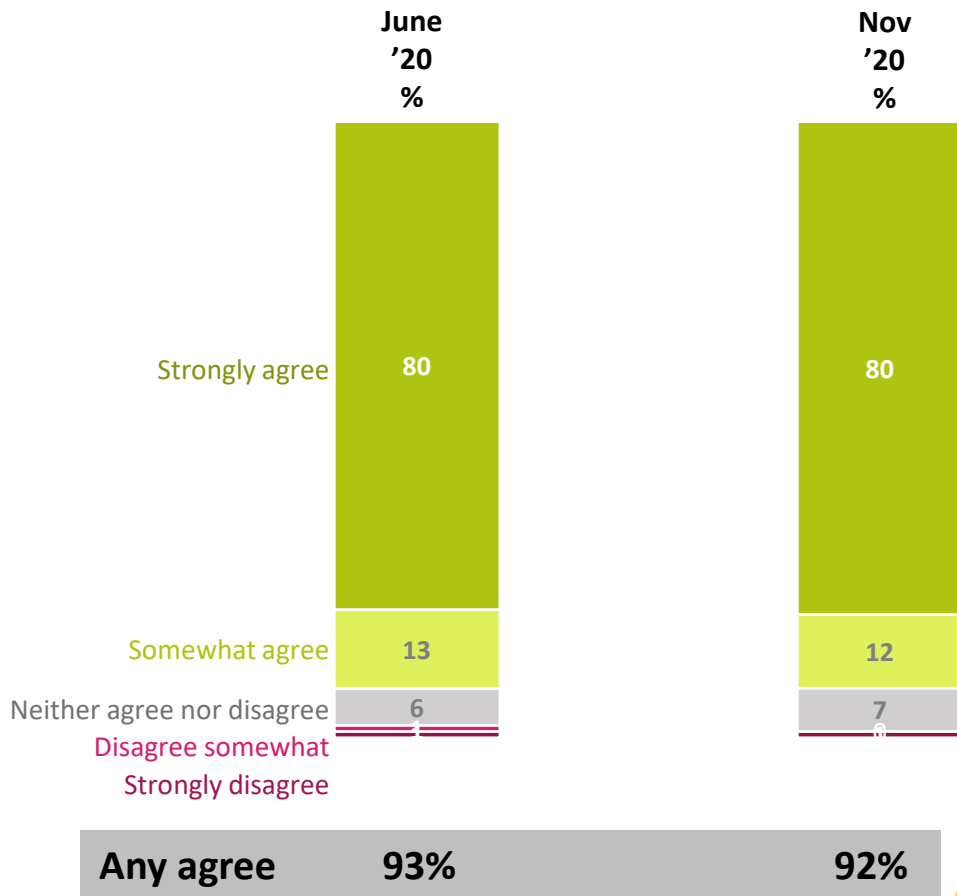
Region

All respondents
%



92% value being able to access and use broadband while at home during the ongoing Covid-19 pandemic

Base: All adults 16+ 1013



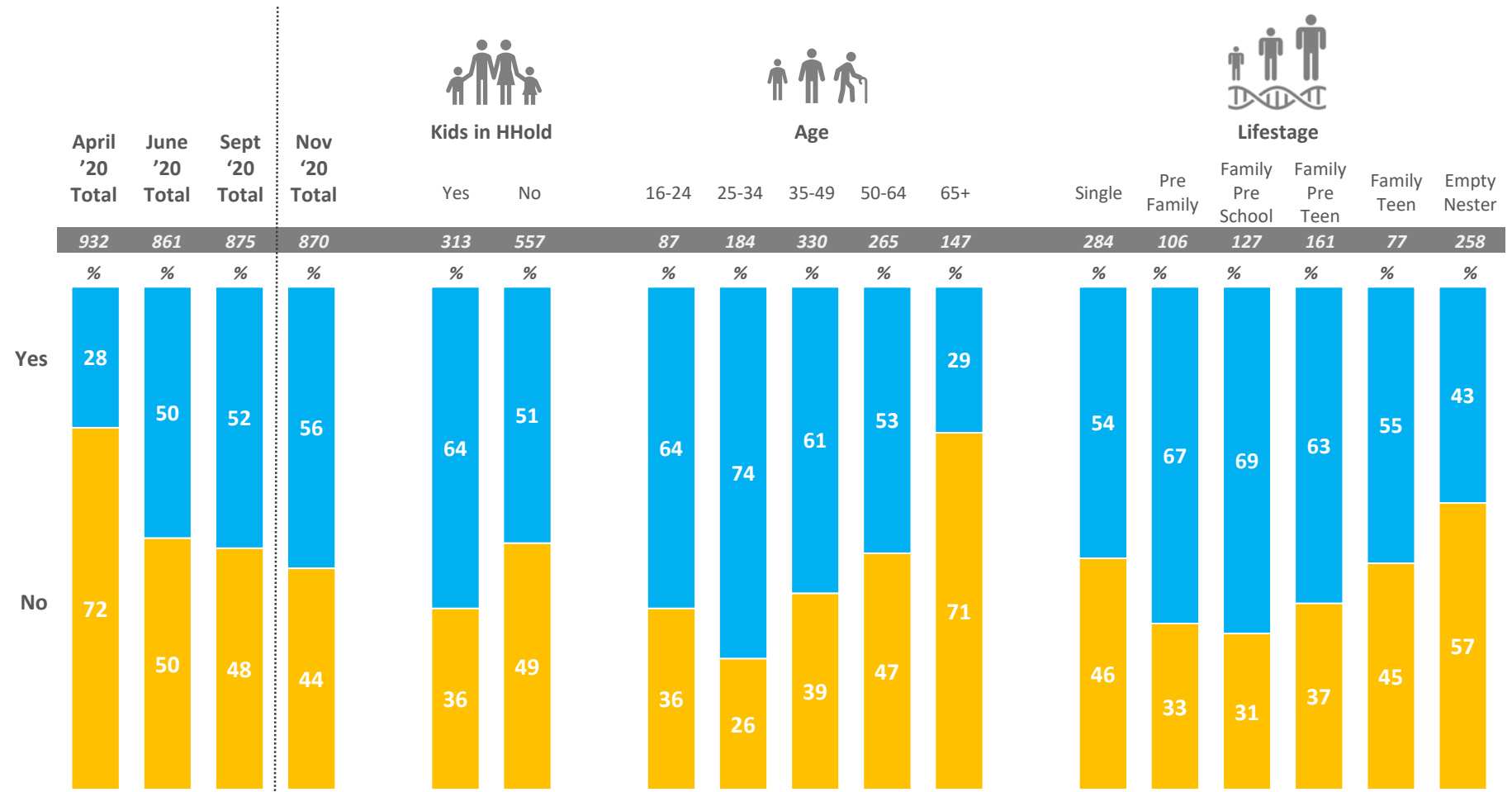
Q.20 To what extent do you agree or disagree with the following statement: "I value being able to access and use broadband while at home during the ongoing Covid-19 pandemic"?



Almost 3 in 5 would be willing to spend more on broadband service to get a better service - the Covid experience appears to have increased reliance on BB

Base: All have broadband 870

November 2020



Sept/Nov Wording: Q.22 Would you spend more to get better home broadband for your household?

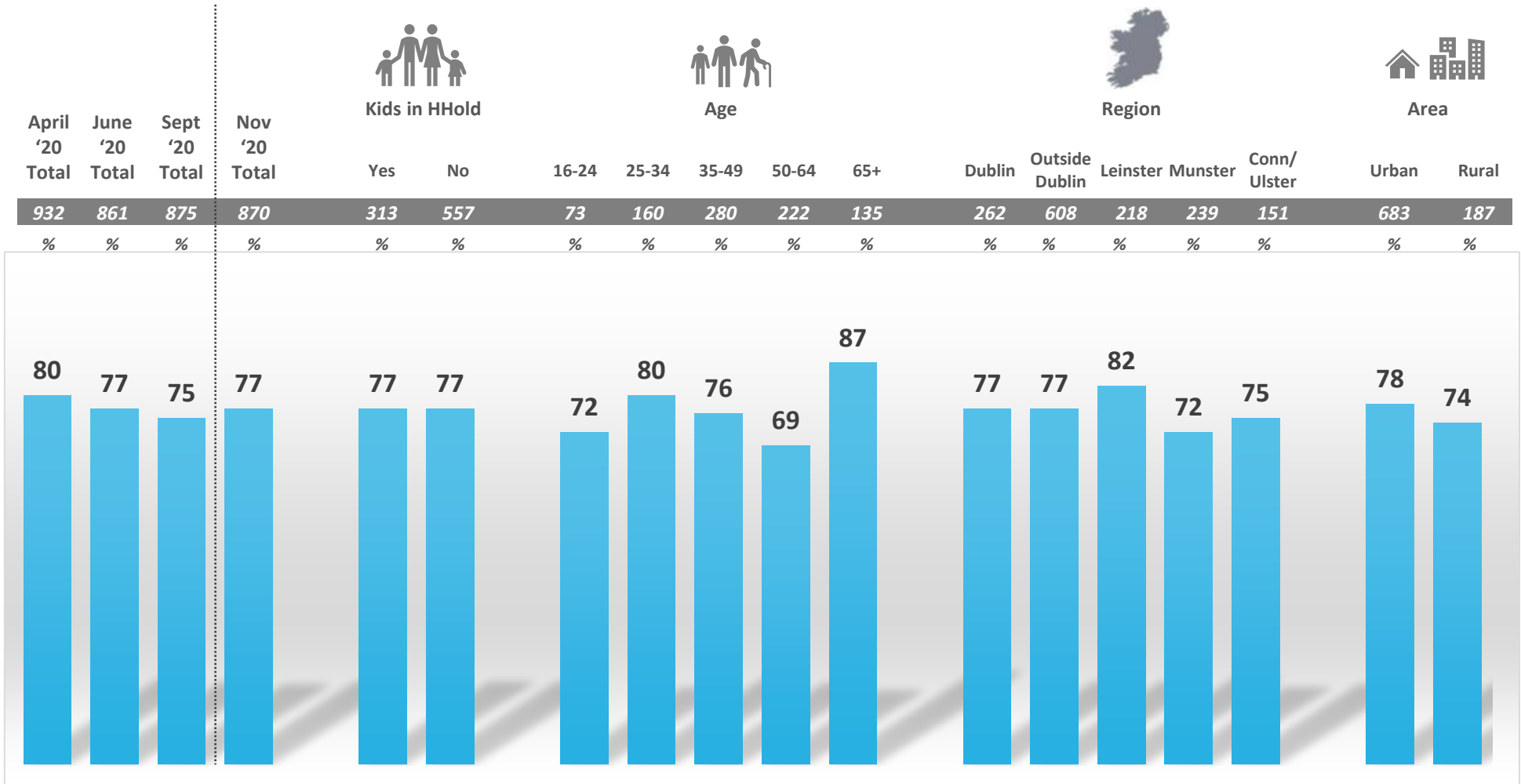
April Wording: Q.32 Would you be willing to spend more each month on broadband to get a better (faster, more reliable) service?

June Wording: Q.21 Would you spend more to get better home broadband for your household?

4 in 5 broadband users agree that their home broadband is adequate to meet the needs of their household

Base: All have broadband 870

November 2020



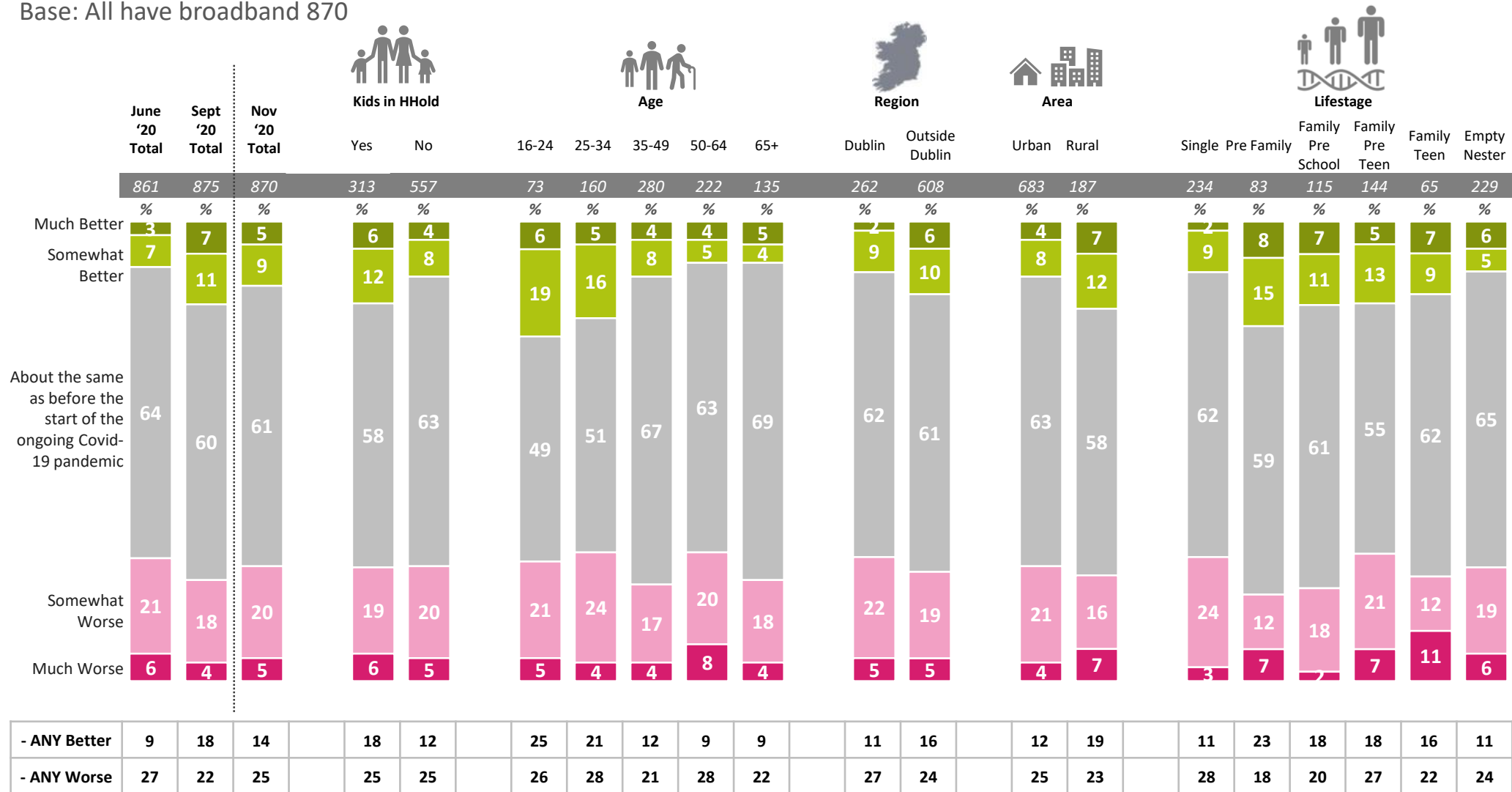
April Wording: Q.29 Do you believe that your current home broadband service is adequate to meet the needs of you and your household?

June/Sept/Nov Wording: Q.23 Do you believe that your home broadband service is adequate to meet the needs of you and your household?

Opinion of Home Broadband since the start of the ongoing Covid-19 pandemic

November 2020

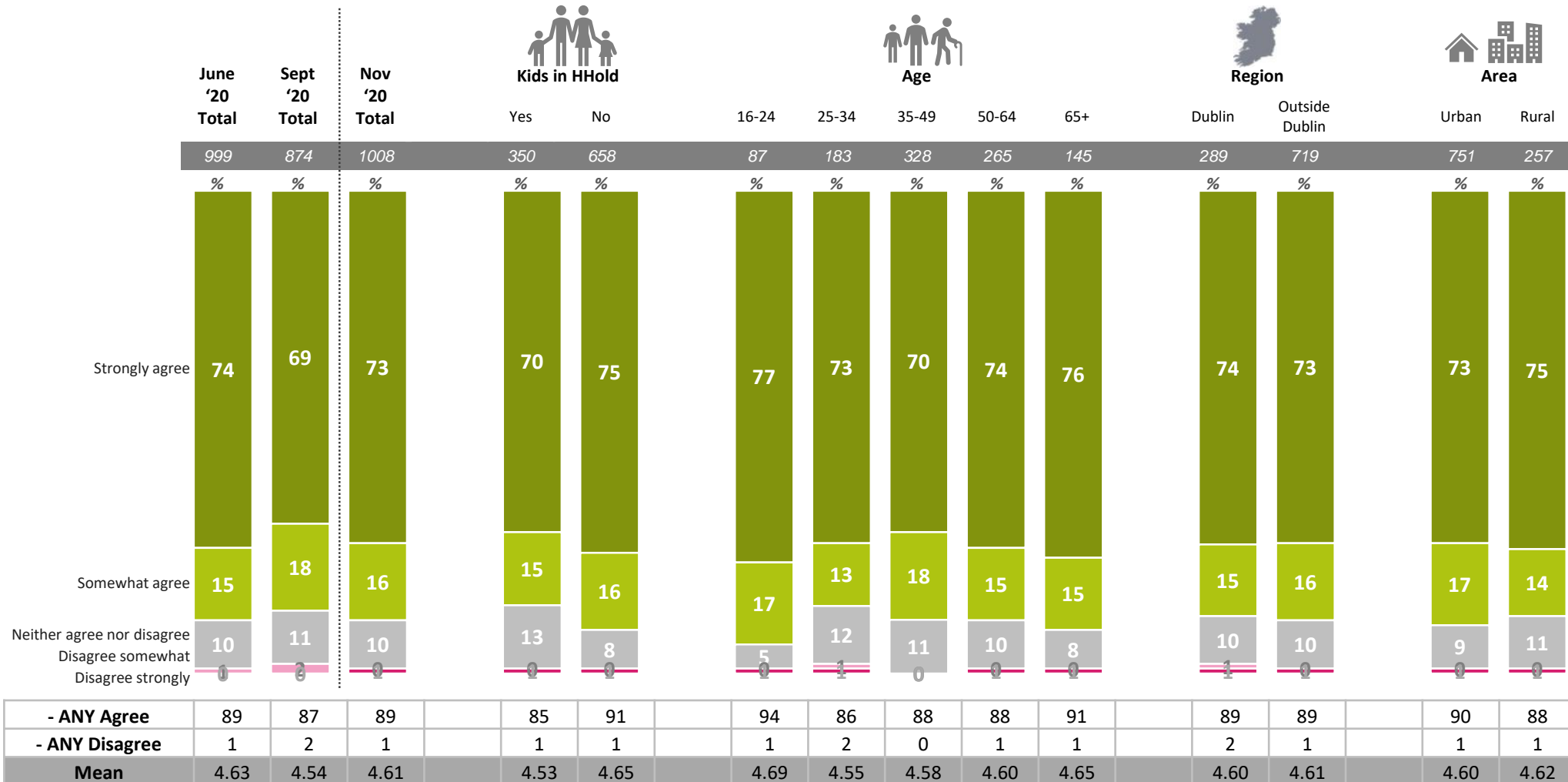
Base: All have broadband 870



3 in 4 strongly value being able to access and use their mobile phone during the ongoing Covid-19 pandemic

Base: All with mobile - 1008

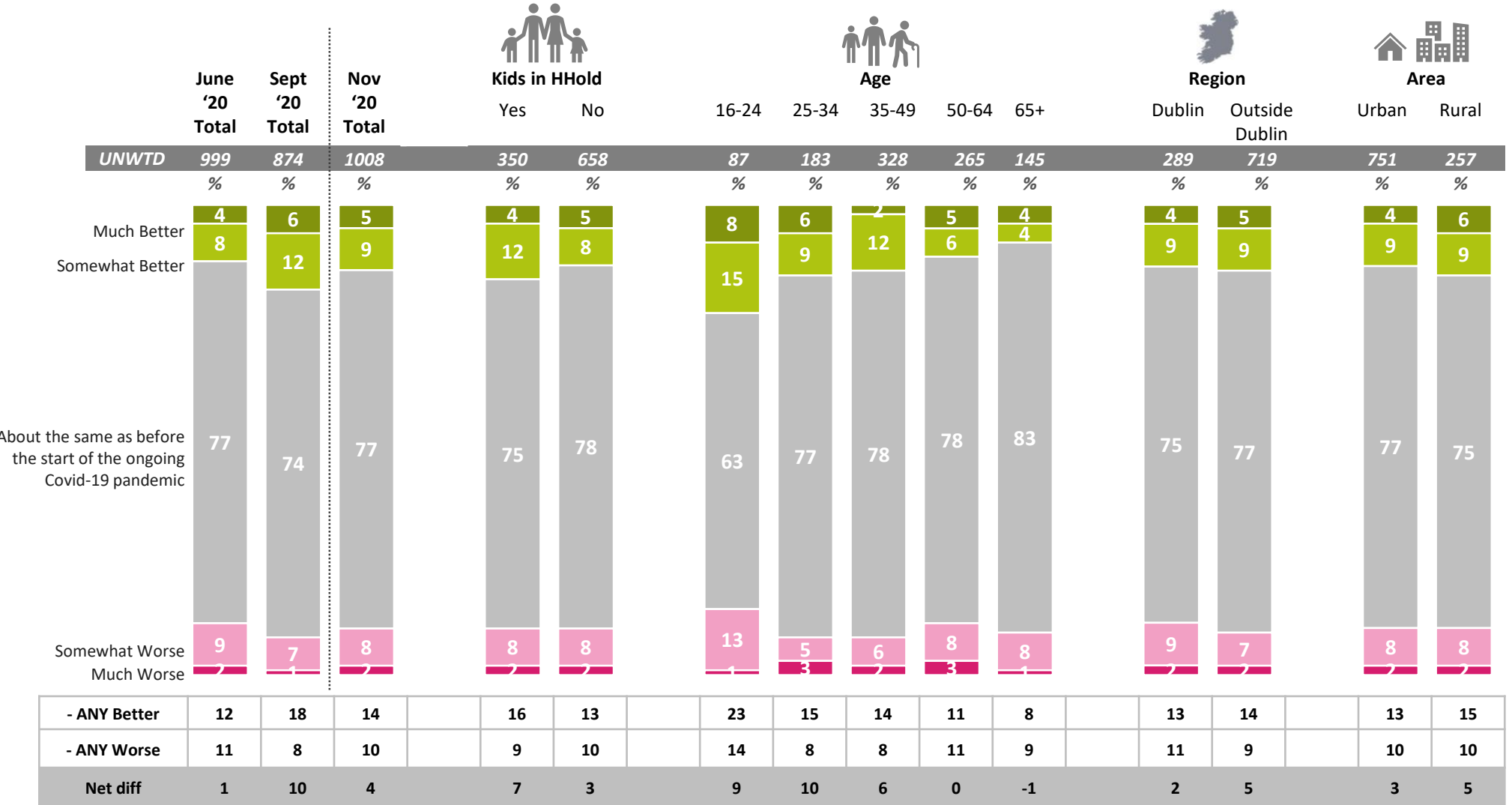
November 2020



Experience of making and receiving voice calls while at home on mobile since the start of the ongoing Covid-19 pandemic

Base: All with mobile - 1008

November 2020



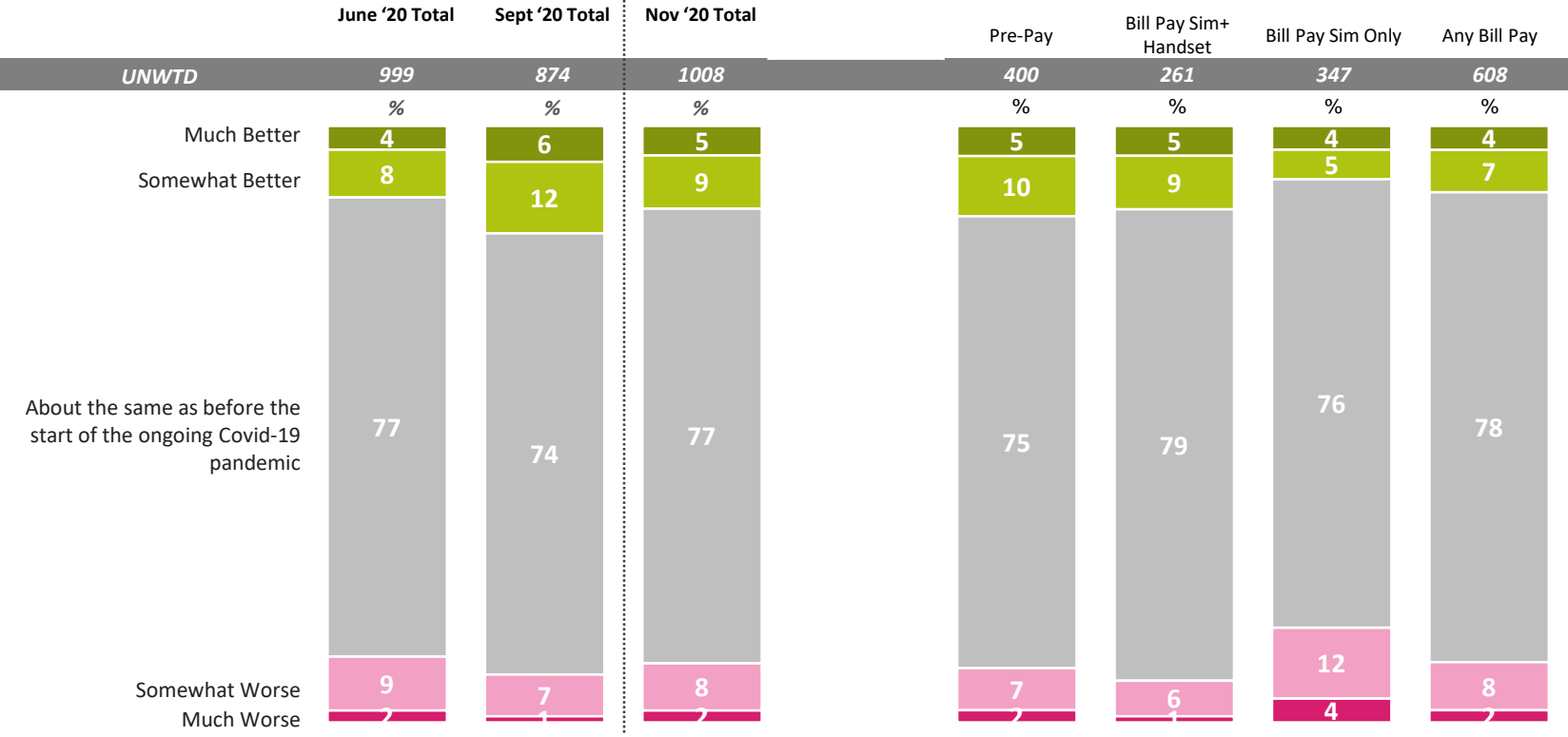
Experience of making and receiving voice calls while at home on mobile since the start of the ongoing Covid-19 pandemic

Base: All with mobile - 1008

November 2020



Pay For Mobile



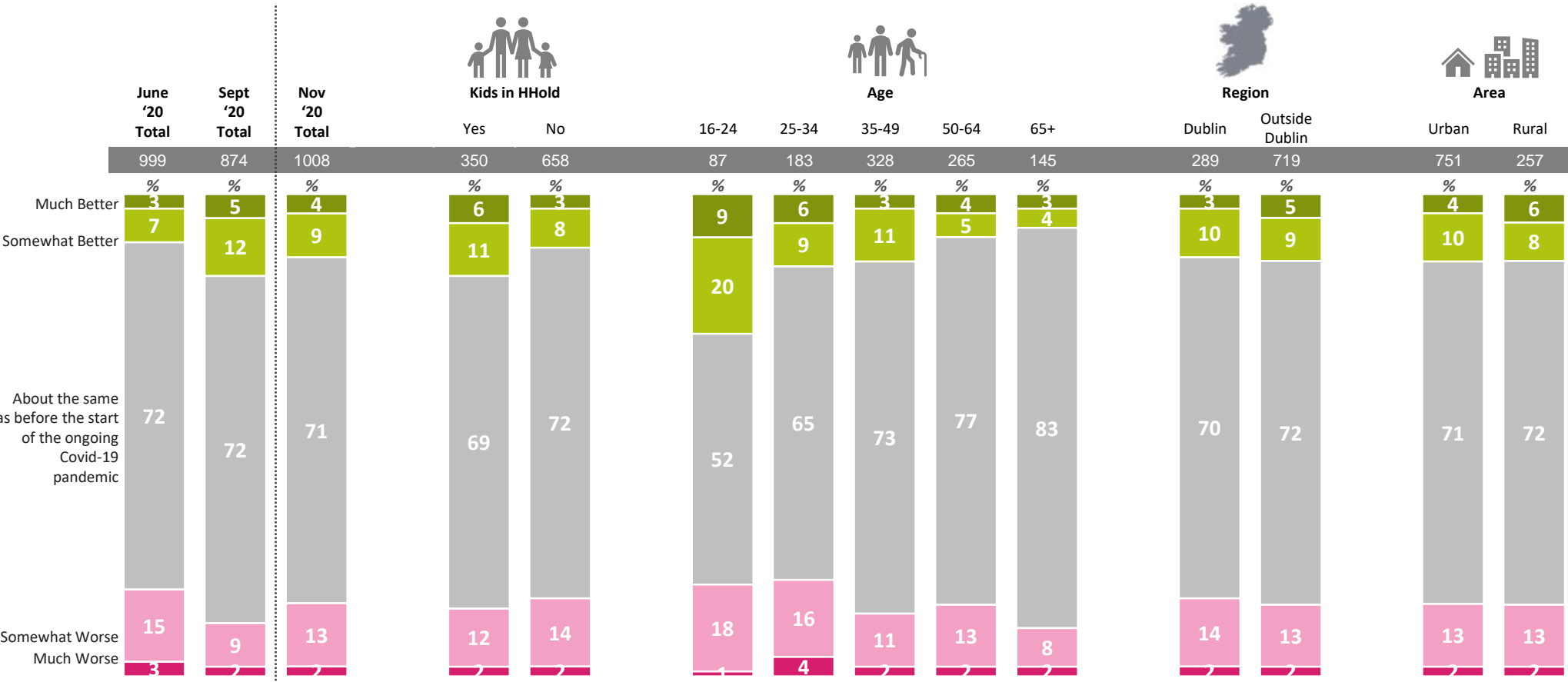
| | | | | | | | |
|-------------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| - ANY Better | 12 | 18 | 14 | 15 | 14 | 8 | 12 |
| - ANY Worse | 11 | 8 | 10 | 9 | 7 | 16 | 10 |
| - NET Difference | 1 | 10 | 4 | 6 | 7 | -8 | 2 |



Experience of using 3G/4G data while at home on mobile since the start of the ongoing Covid-19 pandemic

Base: All with mobile - 1008

November 2020

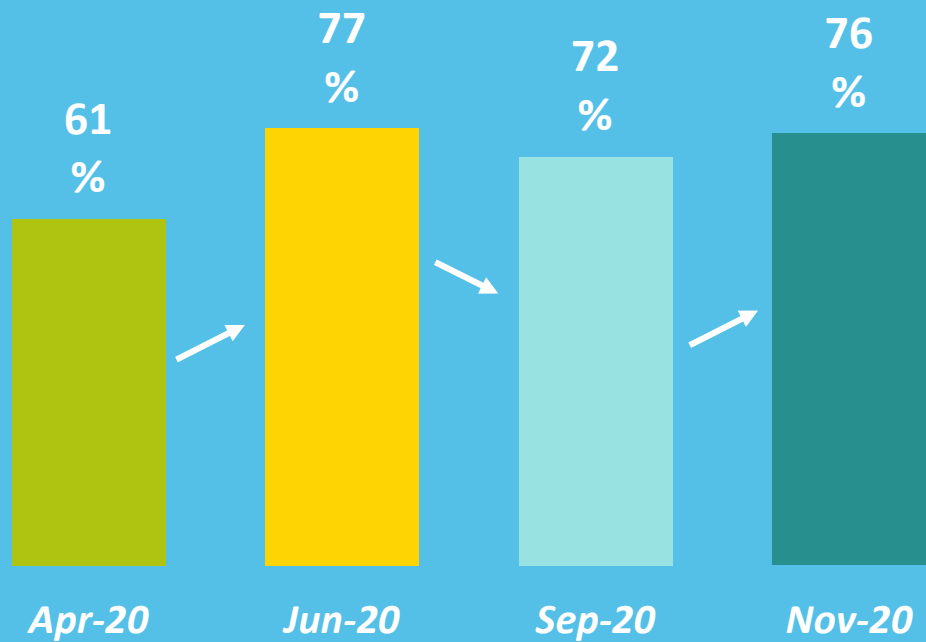


| | | | | | | | | | | | | | | | | | | |
|---------------------|----|----|----|--|----|----|--|----|----|----|----|----|--|----|----|--|----|----|
| - ANY Better | 10 | 17 | 13 | | 17 | 12 | | 29 | 15 | 13 | 9 | 6 | | 14 | 13 | | 14 | 13 |
| - ANY Worse | 18 | 11 | 15 | | 14 | 16 | | 19 | 21 | 14 | 15 | 10 | | 16 | 15 | | 15 | 15 |
| Net Diff | -8 | 6 | -2 | | 3 | -4 | | 10 | -6 | -1 | -6 | -4 | | -2 | -2 | | -1 | -2 |

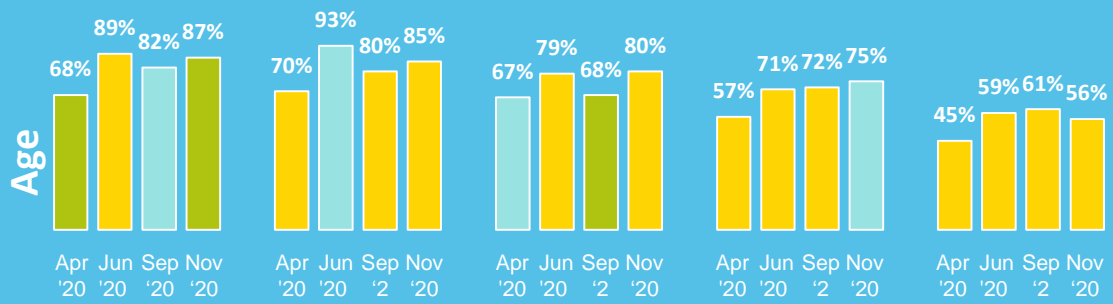


Broadband usage at home remains high

Base: All with home broadband 875



| Age | | | | |
|-------|-------|-------|-------|-----|
| 16-24 | 25-34 | 35-49 | 50-64 | 65+ |

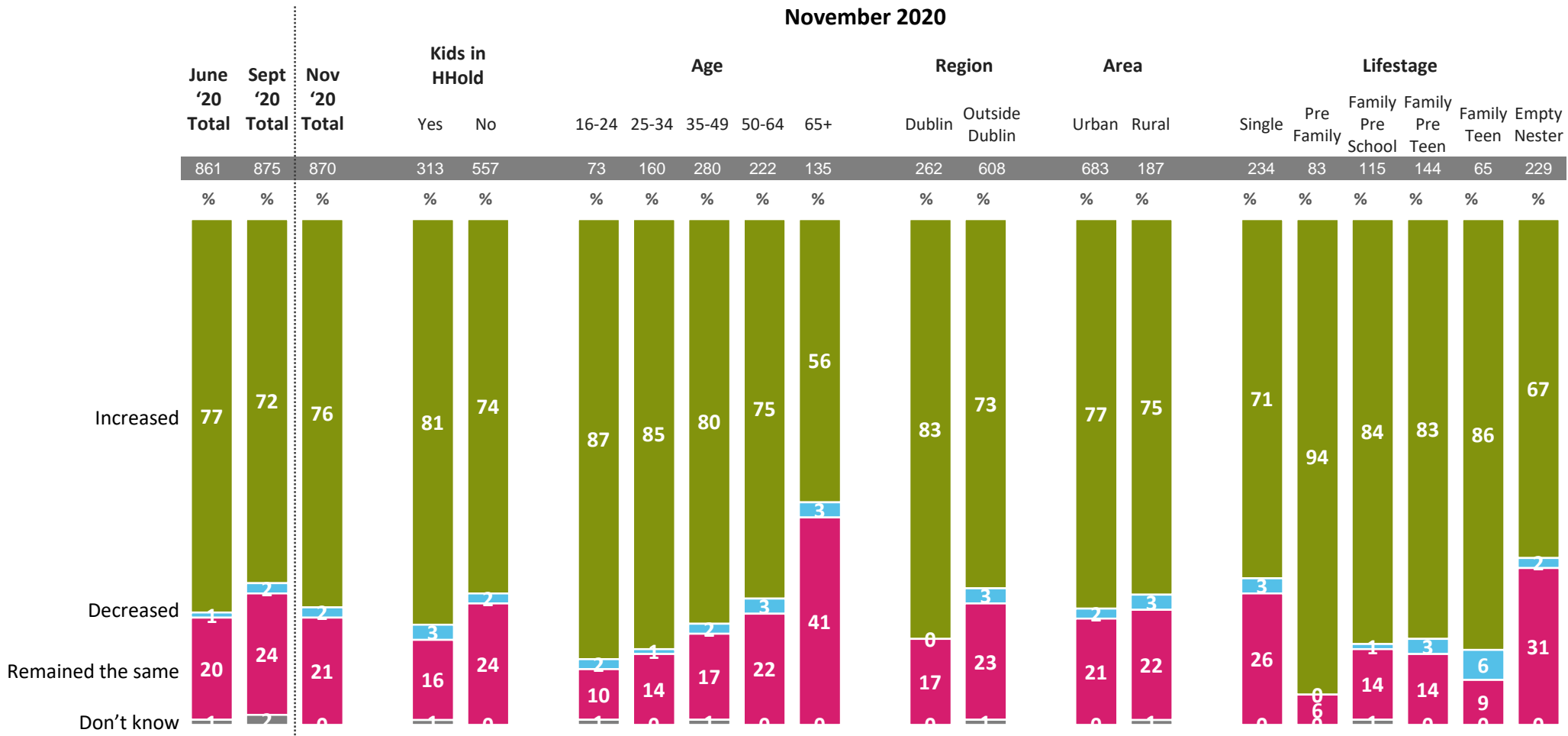


Q.28 Do you think your household's usage of your home broadband has increased, decreased or remained the same since the start of the ongoing Covid-19 pandemic?

Household usage perception of home broadband since the start of the ongoing Covid-19 pandemic

Base: All have BB - 870

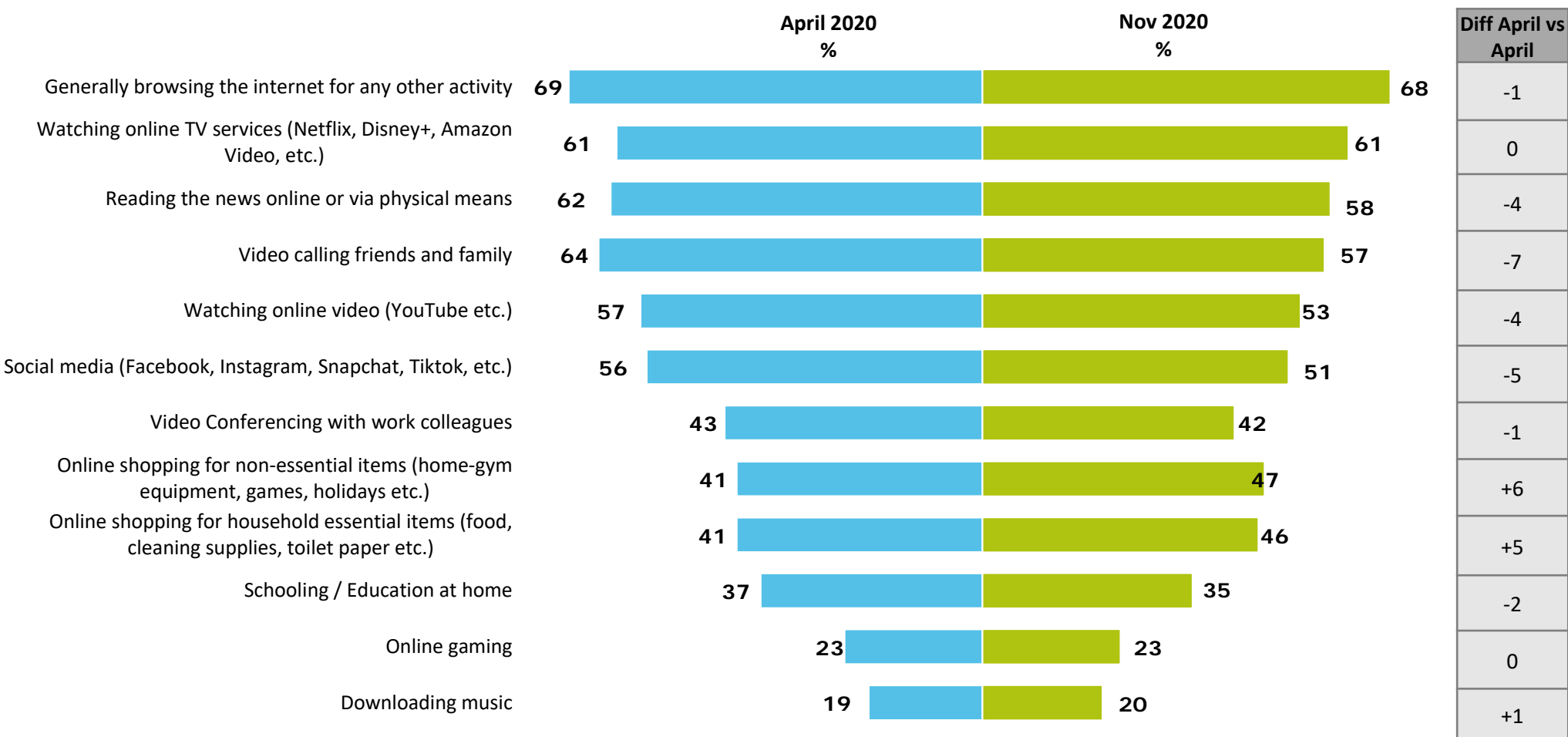
November 2020



Usage of Online activities since 1st of March 2020

Base: All have Broadband 870

Doing more (relative to before Covid)



Usage of Online activities since 1st of March 2020 x demographics

Base: All have Broadband 870

| | April '20 Total | June '20 Total | Sept '20 Total | November 2020 | | | | | | | | | | | | |
|--|-----------------|----------------|----------------|---------------|-------|-------|-------|-------|-----|--------|----------------|----------|---------|-------------|-------|-------|
| | | | | Total | Age | | | | | Region | | | | | Area | |
| | | | | | 16-24 | 25-34 | 35-49 | 50-64 | 65+ | Dublin | Outside Dublin | Leinster | Munster | Conn/Ulster | Urban | Rural |
| UNWTD | 932 | 861 | 875 | 870 | 73 | 160 | 280 | 222 | 135 | 262 | 608 | 218 | 239 | 151 | 683 | 187 |
| | % | % | % | % | % | % | % | % | % | % | % | % | % | % | % | % |
| Generally browsing the internet for any other activity | 63 | 69 | 60 | 68 | 79 | 71 | 70 | 70 | 52 | 72 | 66 | 63 | 68 | 68 | 68 | 67 |
| Watching online TV services (Netflix, Disney+, Amazon Video, etc.) | 60 | 61 | 58 | 61 | 77 | 69 | 69 | 57 | 36 | 68 | 58 | 53 | 60 | 62 | 63 | 58 |
| Reading the news online or via physical means | 63 | 62 | 57 | 58 | 65 | 53 | 59 | 56 | 57 | 62 | 56 | 58 | 50 | 61 | 59 | 55 |
| Video calling friends and family | 62 | 64 | 57 | 57 | 77 | 63 | 55 | 52 | 44 | 61 | 55 | 54 | 54 | 58 | 59 | 52 |
| Watching online video (YouTube etc.) | 53 | 57 | 50 | 53 | 77 | 67 | 59 | 39 | 29 | 60 | 49 | 46 | 53 | 49 | 53 | 52 |
| Social media (Facebook, Instagram, Snapchat, Tiktok, etc.) | 54 | 56 | 51 | 51 | 74 | 57 | 52 | 46 | 35 | 51 | 52 | 55 | 50 | 51 | 50 | 55 |
| Online shopping for non-essential items (home-gym equipment, games, holidays etc.) | 26 | 41 | 42 | 47 | 71 | 60 | 50 | 37 | 26 | 52 | 45 | 41 | 45 | 50 | 48 | 45 |
| Online shopping for household essential items (food, cleaning supplies, toilet paper etc.) | 33 | 41 | 41 | 46 | 56 | 56 | 50 | 37 | 34 | 51 | 44 | 41 | 42 | 51 | 46 | 46 |
| Video Conferencing with work colleagues | 37 | 43 | 40 | 42 | 66 | 58 | 43 | 31 | 21 | 52 | 38 | 37 | 37 | 40 | 46 | 34 |
| Schooling / Education at home | N/A | 37 | 32 | 35 | 62 | 31 | 46 | 30 | 7 | 33 | 36 | 36 | 33 | 39 | 33 | 41 |
| Online gaming | 25 | 23 | 25 | 23 | 45 | 26 | 31 | 11 | 4 | 23 | 23 | 23 | 24 | 21 | 21 | 26 |
| Downloading music | 17 | 19 | 23 | 20 | 35 | 22 | 24 | 13 | 9 | 23 | 19 | 19 | 17 | 21 | 20 | 21 |
| None of these | 9 | 7 | 9 | 9 | 5 | 4 | 7 | 9 | 22 | 5 | 11 | 12 | 10 | 12 | 9 | 11 |

April Wording: Q22 Thinking about each of the following activities you might do online. Has your usage of these online activities increased, decreased or remained the same, relative to the period before March 1st?



June/Sept/Nov Wording: Q.29 Has your usage of these online activities increased, decreased or remained the same since the start of the ongoing Covid-19 pandemic?

Services used to carry out work-related activities while at home during the ongoing Covid-19 pandemic

Base: All working now 621

| | June '20 Total | Sept '20 Total | November 2020 | | | | | | |
|--|----------------|----------------|---------------|-------|-----|--------|----------------|-------|-------|
| | | | Total | Age | | Region | | Area | |
| | | | | 16-34 | 35+ | Dublin | Outside Dublin | Urban | Rural |
| UNWTD | 572 | 405 | 621 | 193 | 428 | 187 | 434 | 476 | 145 |
| | % | % | % | % | % | % | % | % | % |
| Fixed or Home telephone (landline) | 11 | 15 | 11 | 9 | 12 | 9 | 12 | 11 | 12 |
| Mobile Phone for traditional Voice/SMS | 41 | 50 | 45 | 36 | 49 | 46 | 44 | 47 | 39 |
| Mobile Phone Data (e.g. Internet/Email on your mobile phone handset) | 40 | 46 | 42 | 48 | 39 | 49 | 38 | 43 | 39 |
| Home broadband service | 66 | 74 | 67 | 70 | 65 | 80 | 60 | 71 | 56 |
| Mobile Broadband service (e.g. Dongle) | 8 | 12 | 12 | 13 | 11 | 11 | 12 | 11 | 15 |

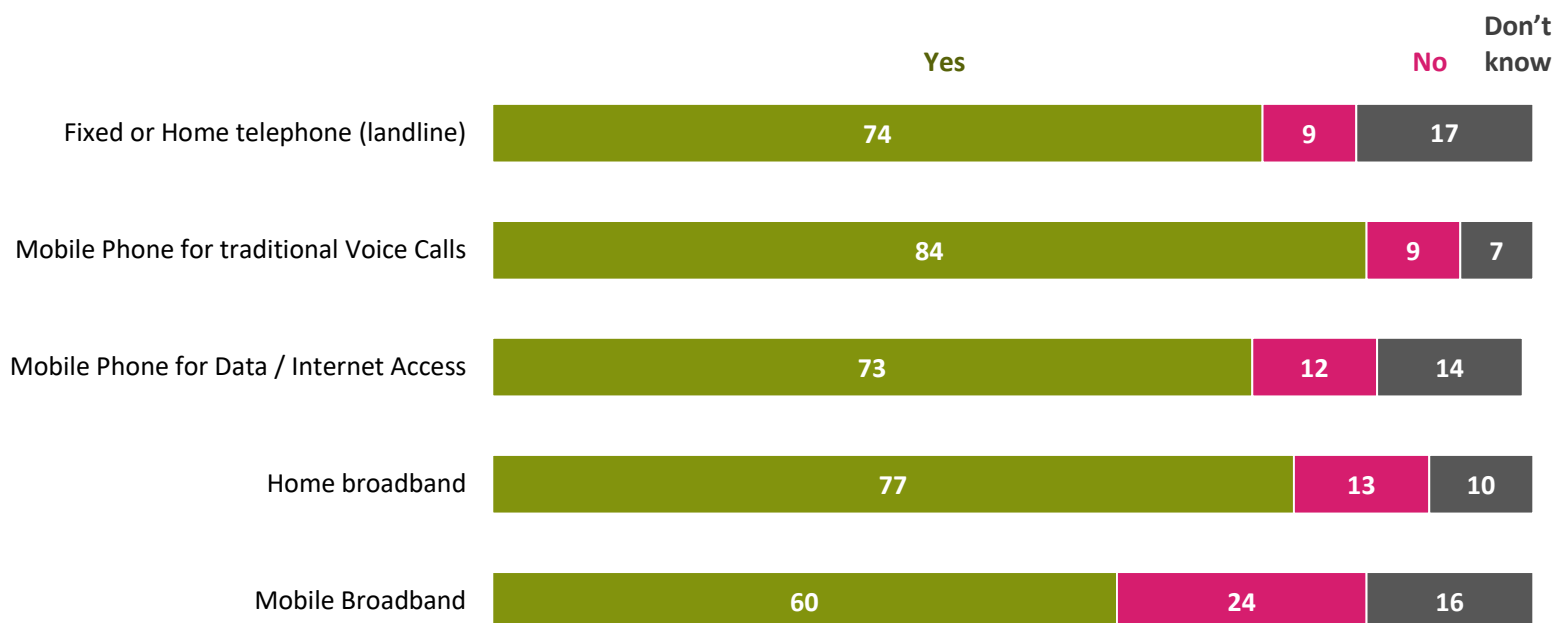


Extent each service is adequate for work related activities at home during Covid-19

Base: All using each service at home for work

November 2020

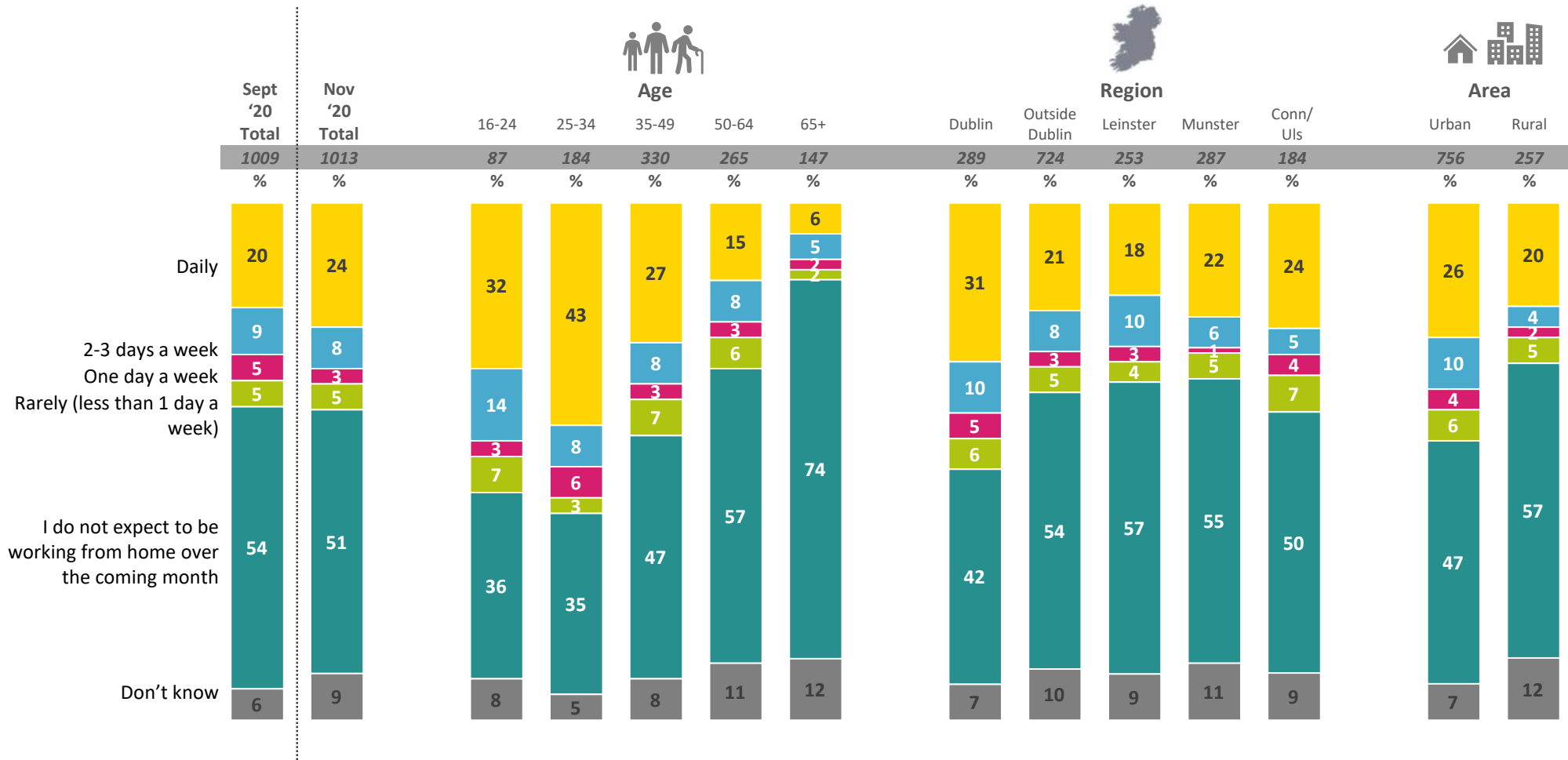
Do you believe that your current ... service is adequate to allow you to carry out your work related activities that you are currently using this service for while at home during the ongoing Covid-19 pandemic



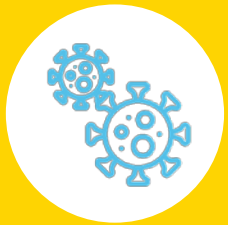
Expect to be working from home (using a PC, laptop or tablet to undertake your normal work)?

Base: All currently working 1013

November 2020



Key Highlights November 2020



COVID - 19



- As in September 2020 almost 3 in 5 are **willing to spend more on broadband to get a better service**. This indicates that the COVID experience is having an impact with increased reliance on broadband. The level of agreement with this is more likely to be among the younger cohorts which tend to rely on broadband more.



- Overall **6 in 10** perceive their broadband to be about the same as the start of the COVID 19 pandemic, **1 in 4 believe it to be worse**, with about **1 in 7 also believing it to be better**.



- In terms of online usage and activities since the 1st of March 2020, 76% believe that their household usage of Broadband has increased. Those doing more relative to before COVID is still strong especially around online shopping versus April figures (at the height of the pandemic).



- Amongst those working now, just under 3 in 5 are working from home to some degree. Working from home is significantly stronger amongst those in Dublin.



- In general, those using various technology services for work related activities at home are satisfied. **Mobile Broadband appears the most challenging** for those working from home.