An Coimisiún um
Rialáil Cumarsáide
Commission for
Communications Regulation

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

Sept 2020

B&A RESEARCH & INSIGHT

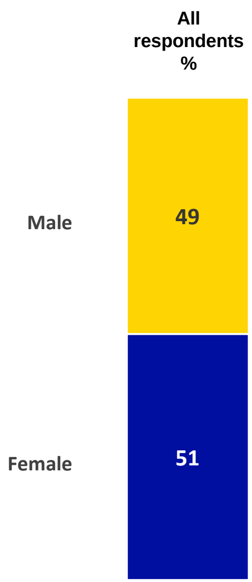
Methodology

- This survey is administered online to a sample of 1,046 adults.
- The sample is quota controlled by gender, age, social class, region to match the known demographics of the population (CSO estimates).
- Online fieldwork on the project was undertaken between 3rd – 15th September 2020.

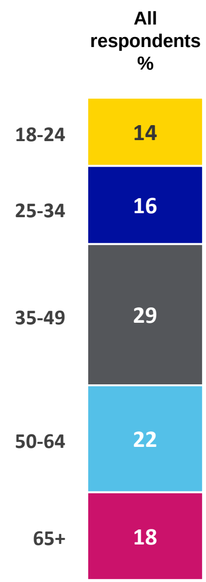
Sample Profile

Base: All respondents aged 16+ - 1,009

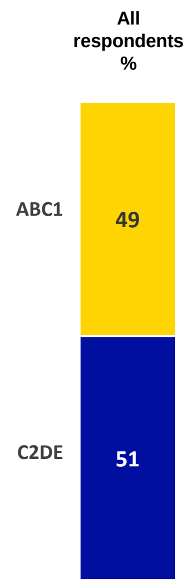
Gender



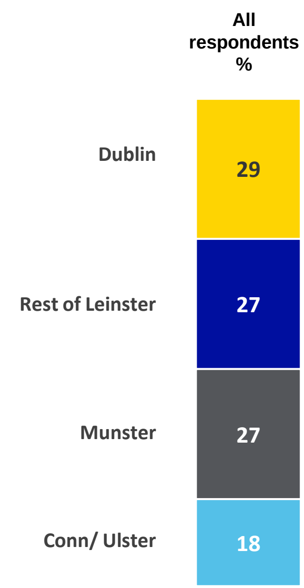
Age



Social Class



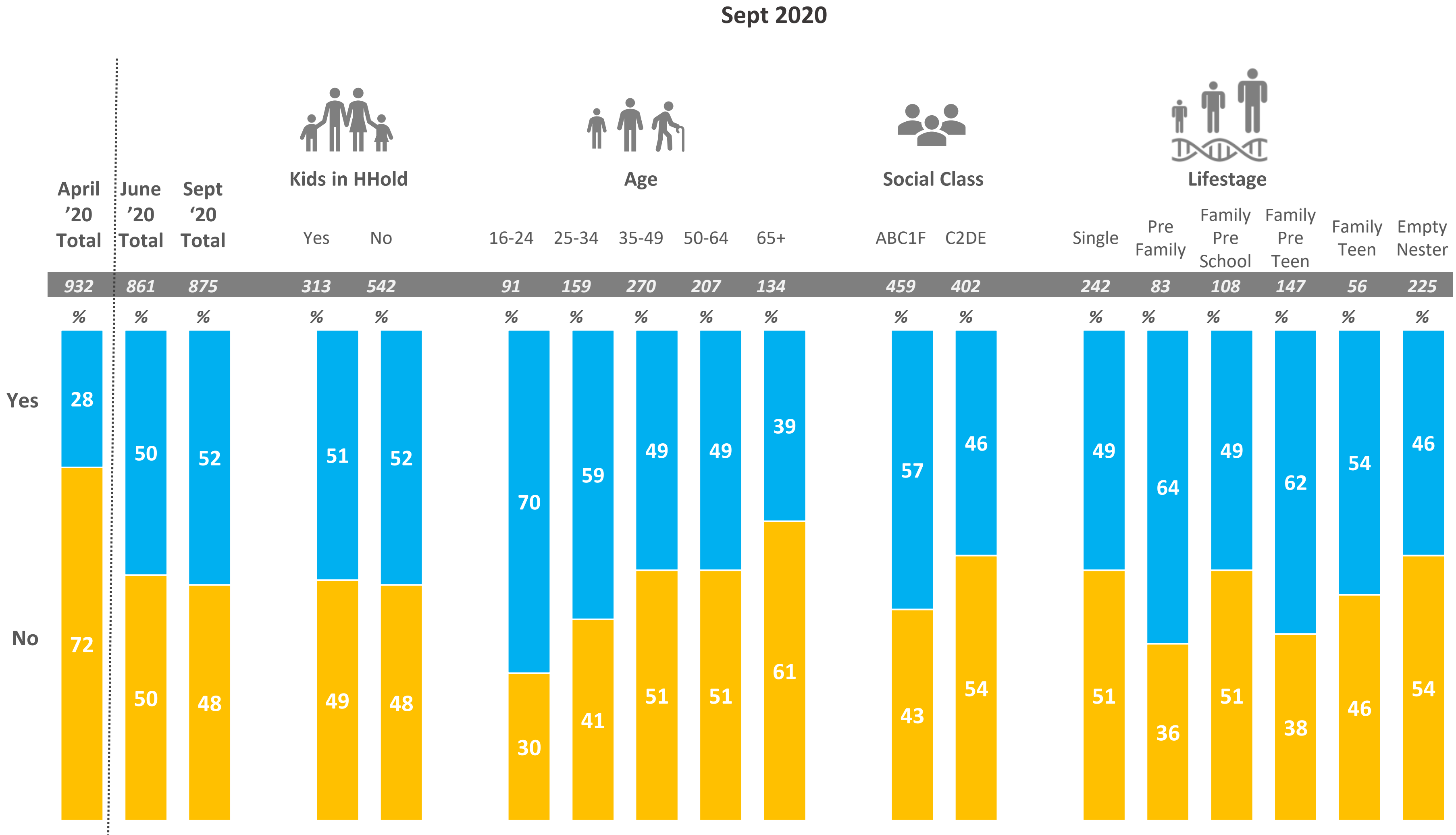
Region



Analysis of sample

Half 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 with home broadband 875



Most likely the younger age cohort and middle class.

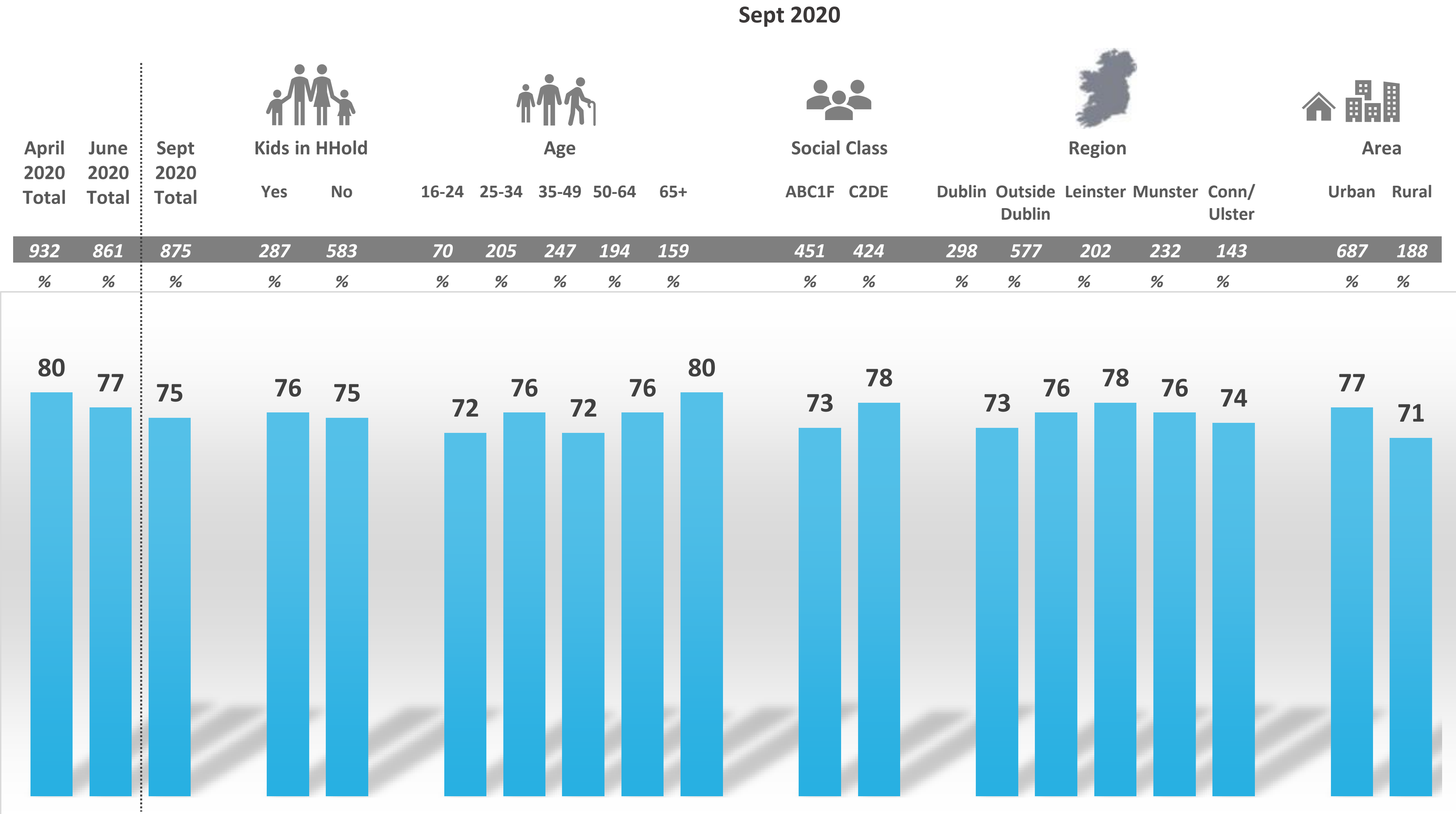
Sept Wording: Q.22 Would you spend more to get better home broadband for your household?

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 875



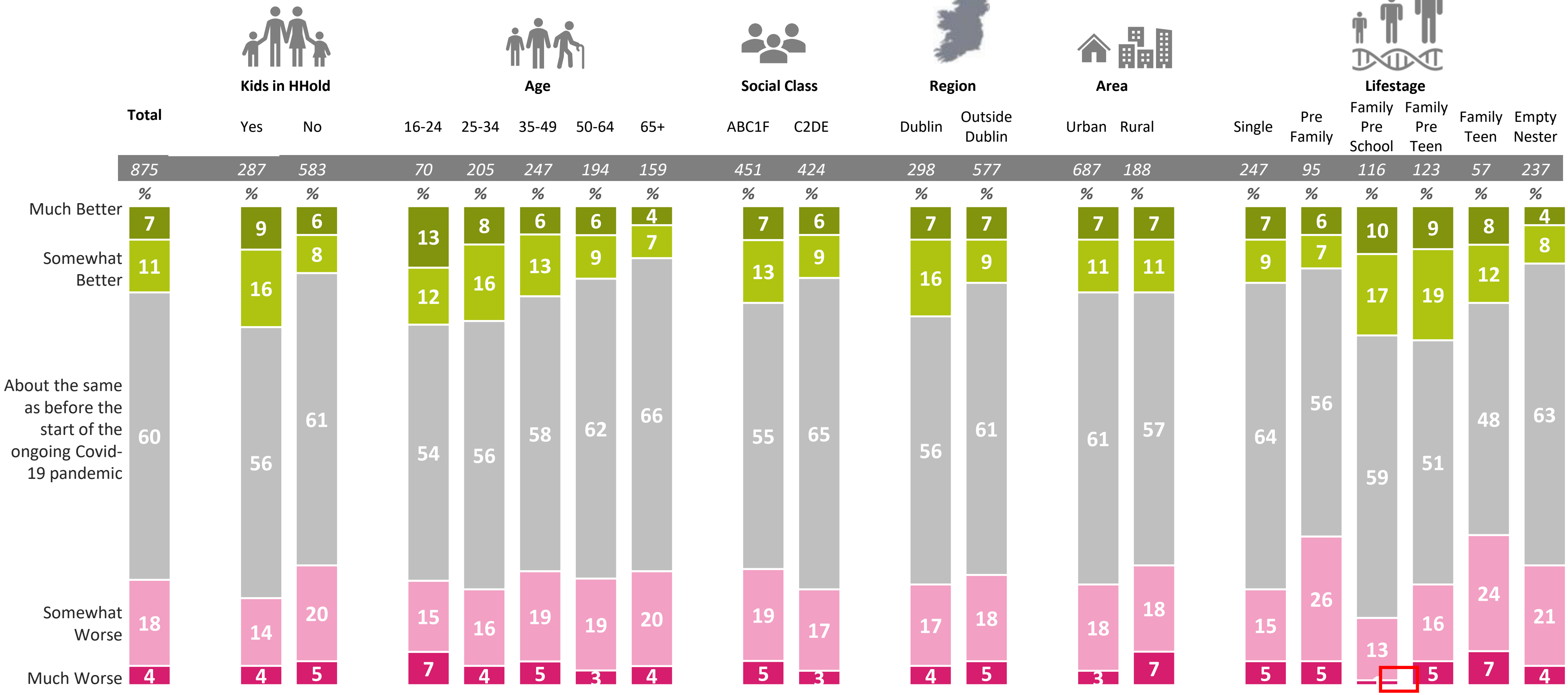
Rural lower and over 65+ are content.

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

Base: All with home BB - 875

Sept 2020



	Total	Yes	No	16-24	25-34	35-49	50-64	65+	ABC1F	C2DE	Dublin	Outside Dublin	Urban	Rural	Single	Pre Family	Family Pre School	Family Pre Teen	Family Teen	Empty Nester
- ANY Better	18	26	14	25	24	18	15	11	21	15	23	16	18	18	16	13	27	28	21	12
- ANY Worse	22	18	25	22	20	23	23	24	25	20	21	23	21	25	20	31	14	21	31	25

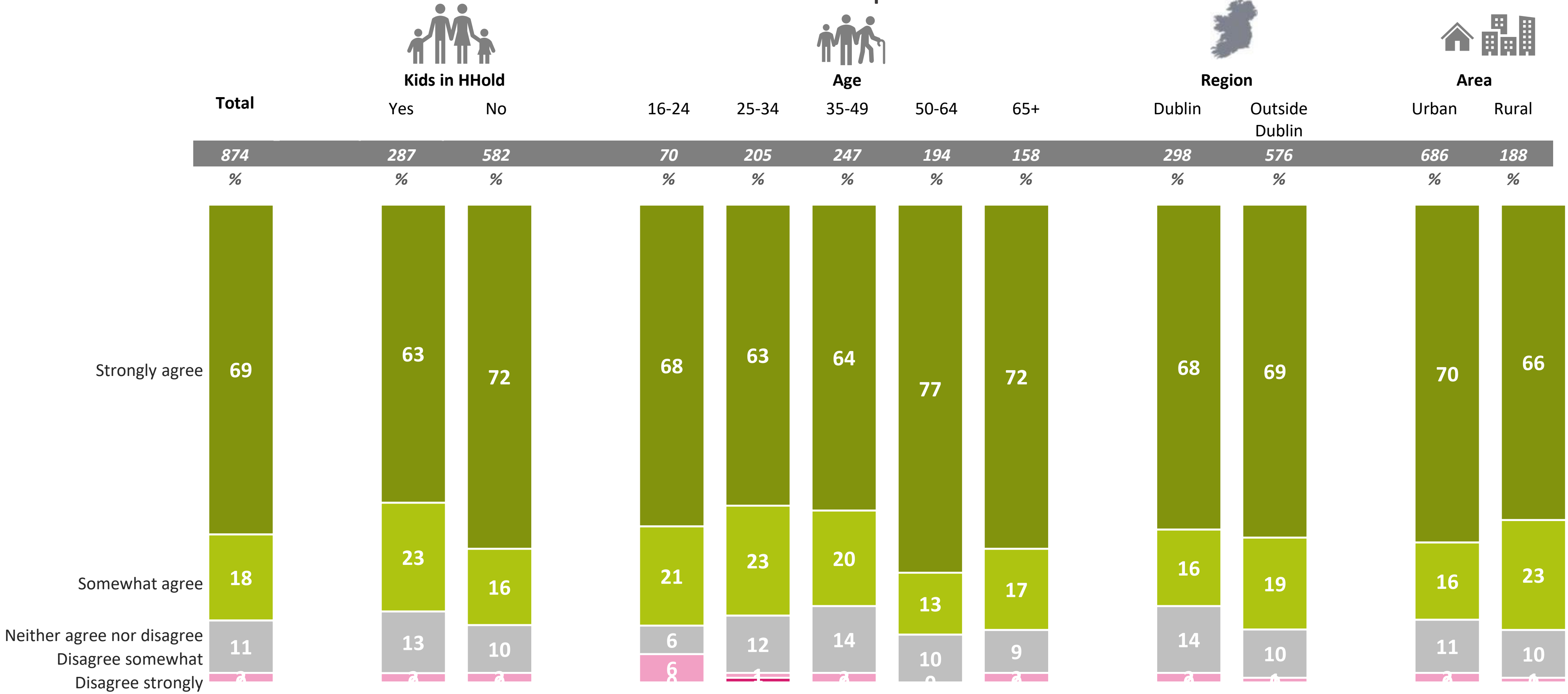
While 3 in 5 perceived their BB to be about the same, one in five believe it to be worse.

Q.24 Do you think that your home broadband service has got better, worsened or remained the same since the start of the ongoing Covid-19 pandemic?

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

Base: All with mobile - 874

Sept 2020

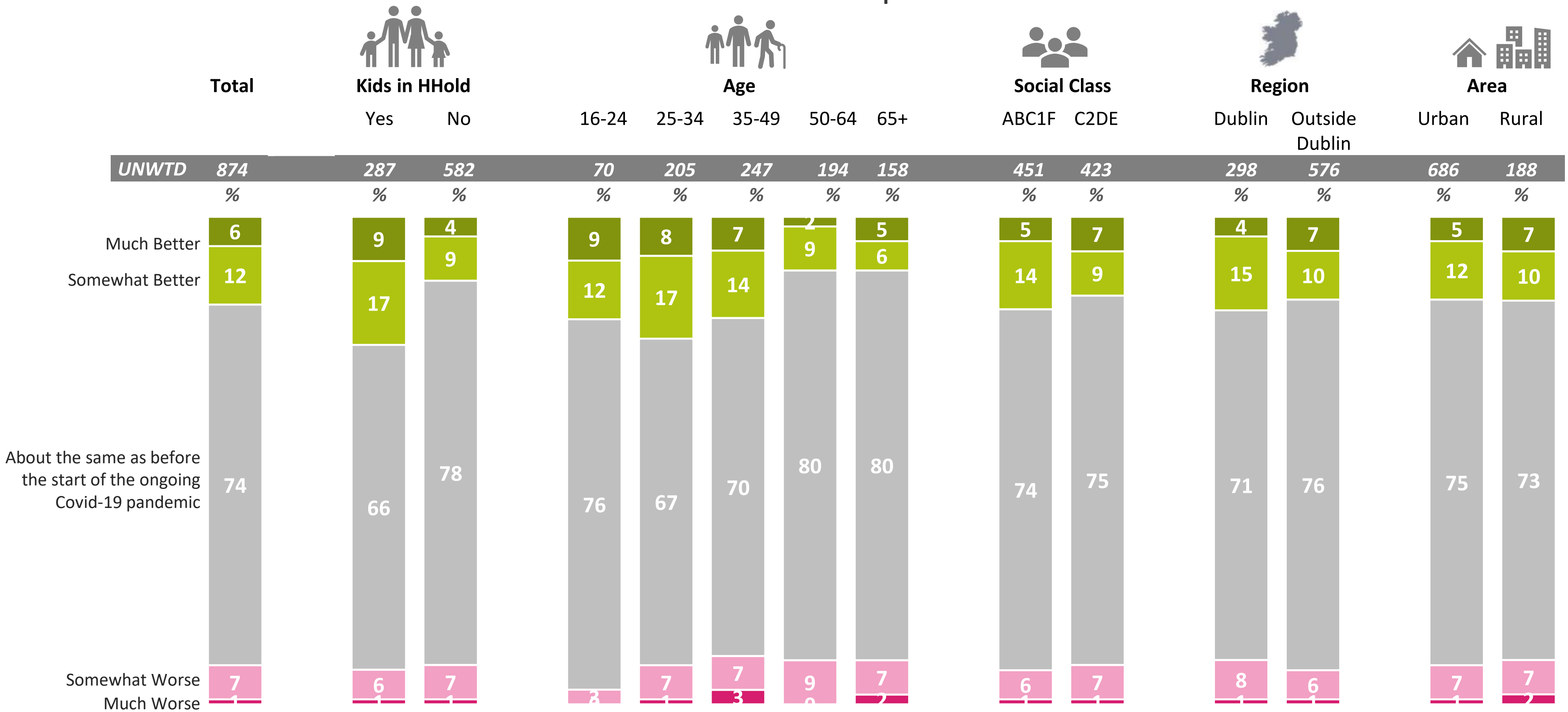


- ANY Agree	87		86	88		89	86	84	90	89		84	89		86	89
- ANY Disagree	2		2	2		6	2	2	-	2		2	2		2	1
Mean	4.54		4.47	4.58		4.52	4.47	4.47	4.67	4.58		4.51	4.56		4.54	4.54

Q.25 To what extent do you agree or disagree with the following statement: "I value being able to access and use my mobile phone during the ongoing Covid-19 pandemic"?

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 - 874



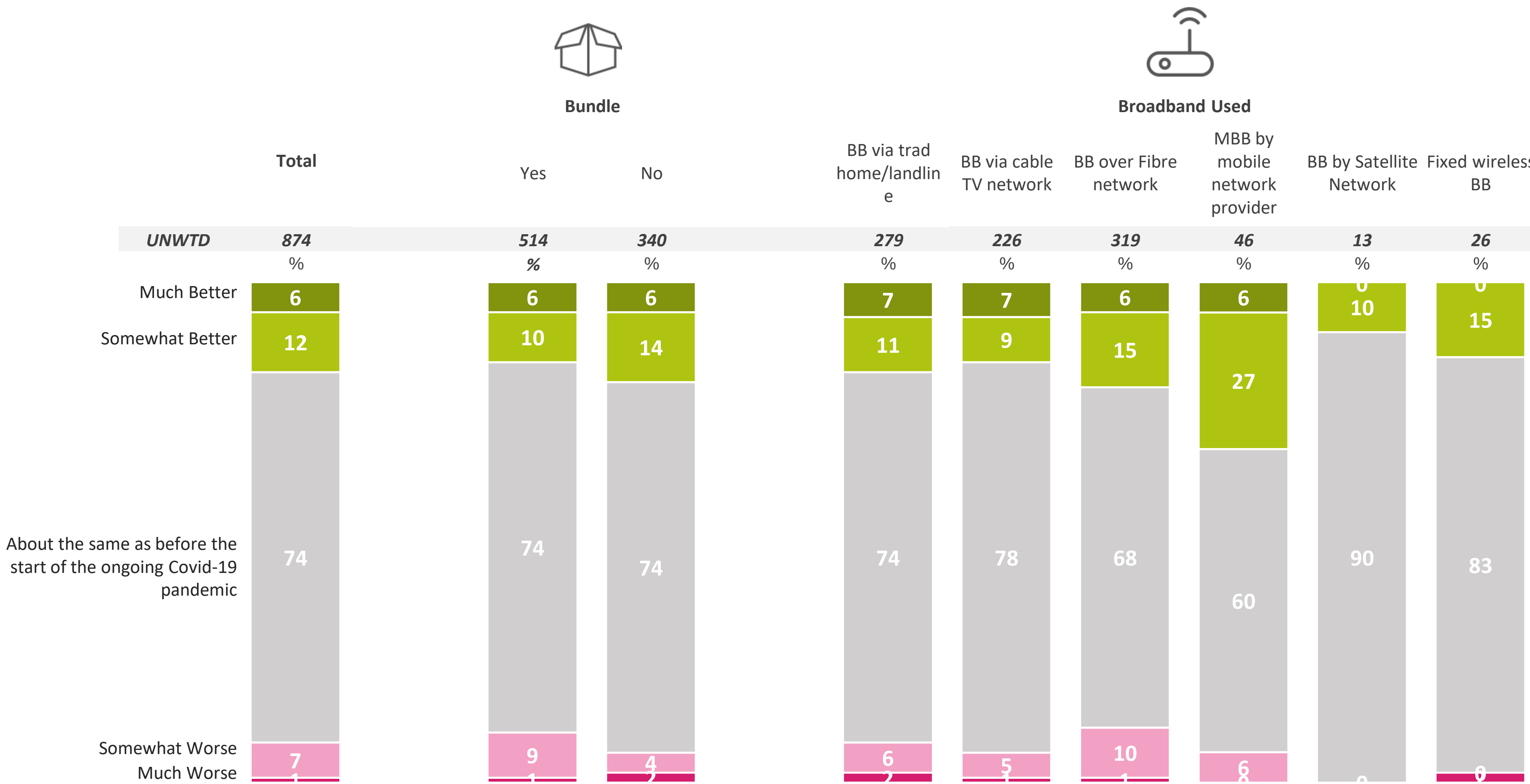
	Total		Yes	No		16-24	25-34	35-49	50-64	65+		ABC1F	C2DE		Dublin	Outside Dublin		Urban	Rural
- ANY Better	18		26	14		21	25	21	12	11		11	13		10	13		11	14
- ANY Worse	8		8	8		3	8	10	9	9		13	9		13	10		9	14

No real change in mobile calling experience during the pandemic.

Q.26 Please describe your experience of making and receiving voice calls while at home on your mobile phone since the start of the ongoing Covid-19 pandemic?

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 - 874

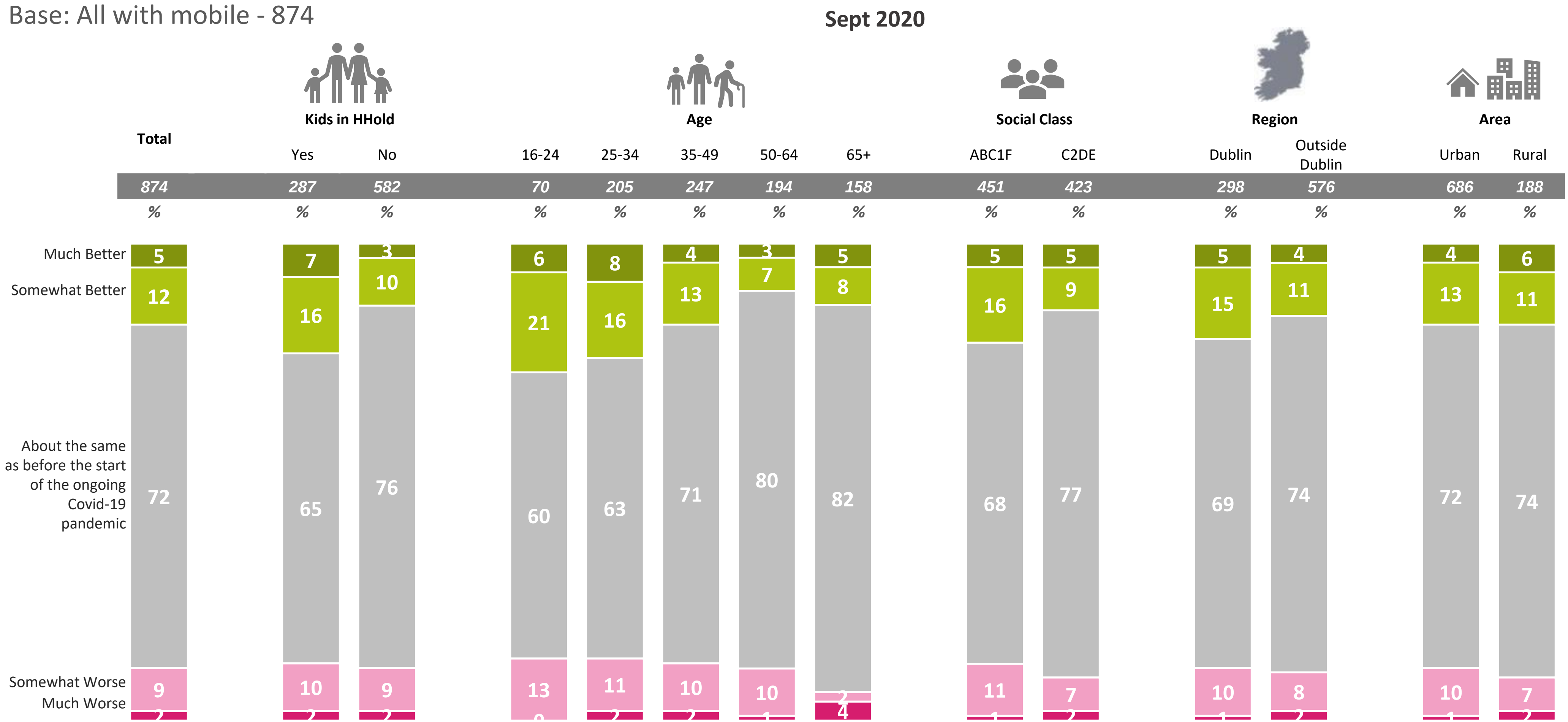


- ANY Better	18		16	20		18	16	21	34	10	15
- ANY Worse	8		10	6		8	6	11	6	-	2

Q.26 Please describe your experience of making and receiving voice calls while at home on your mobile phone since the start of the ongoing Covid-19 pandemic?

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

Base: All with mobile - 874

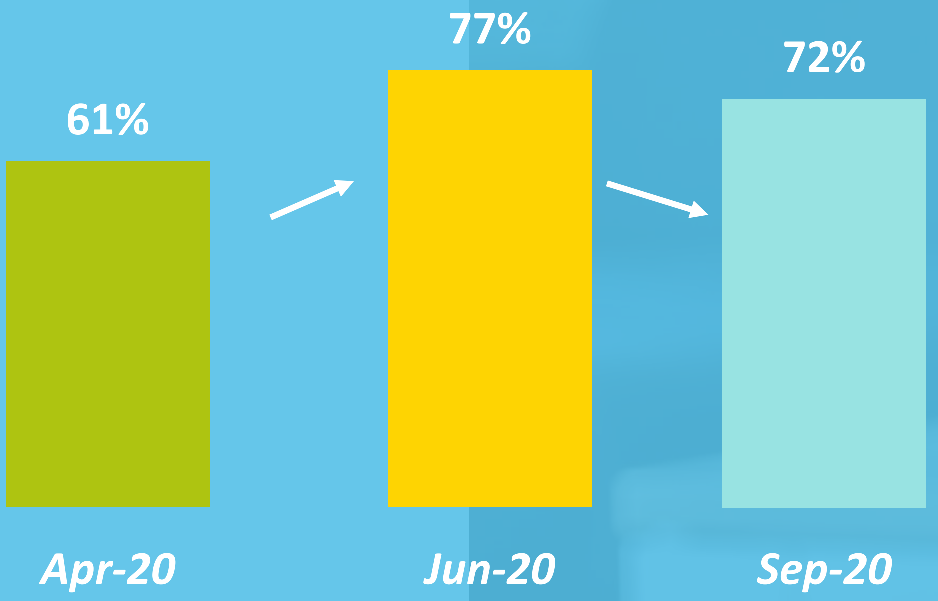


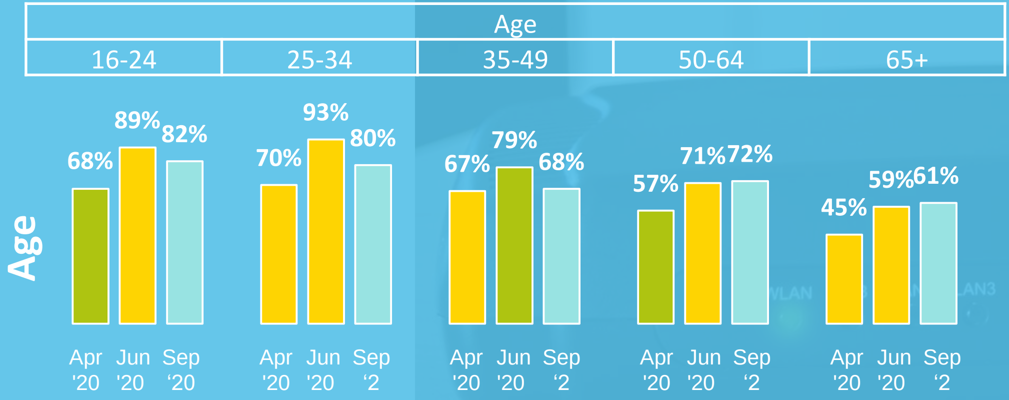
- ANY Better	17		24	14		27	24	17	9	13		20	14		20	16		17	17
- ANY Worse	11		12	10		13	13	12	10	6		12	9		11	10		11	10

Q.27 Please describe your experience of using 3G/4G data while at home on your mobile phone since the start of the ongoing Covid-19 pandemic?

Slight drop back in broadband usage at home but sill significantly higher than in April

Base: All with home broadband 875





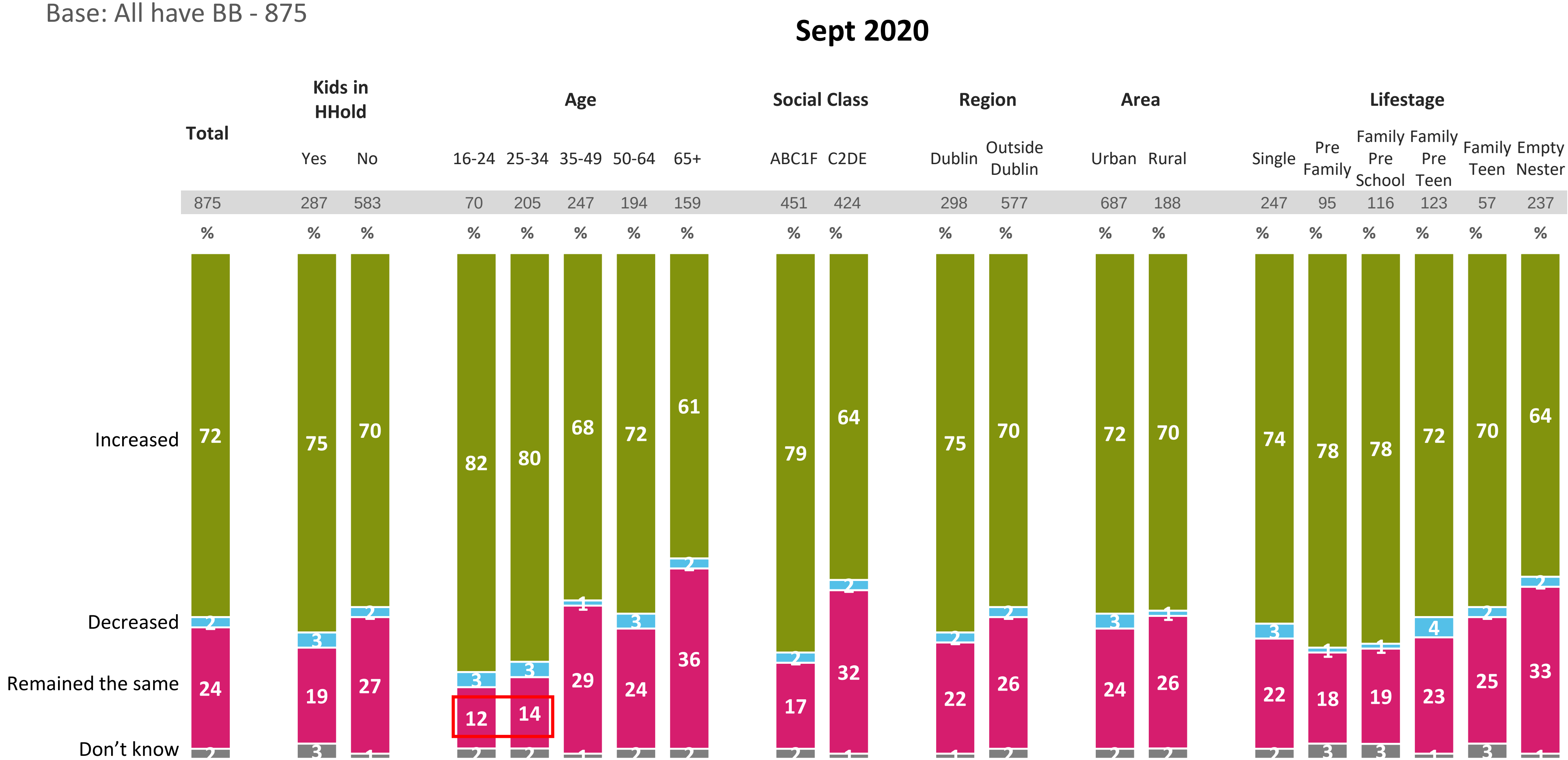
All age groups see an increase in usage of Broadband.

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?

Q.21 Do you think your household's usage of your home broadband has changed (increased or decreased) since March 1st?

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

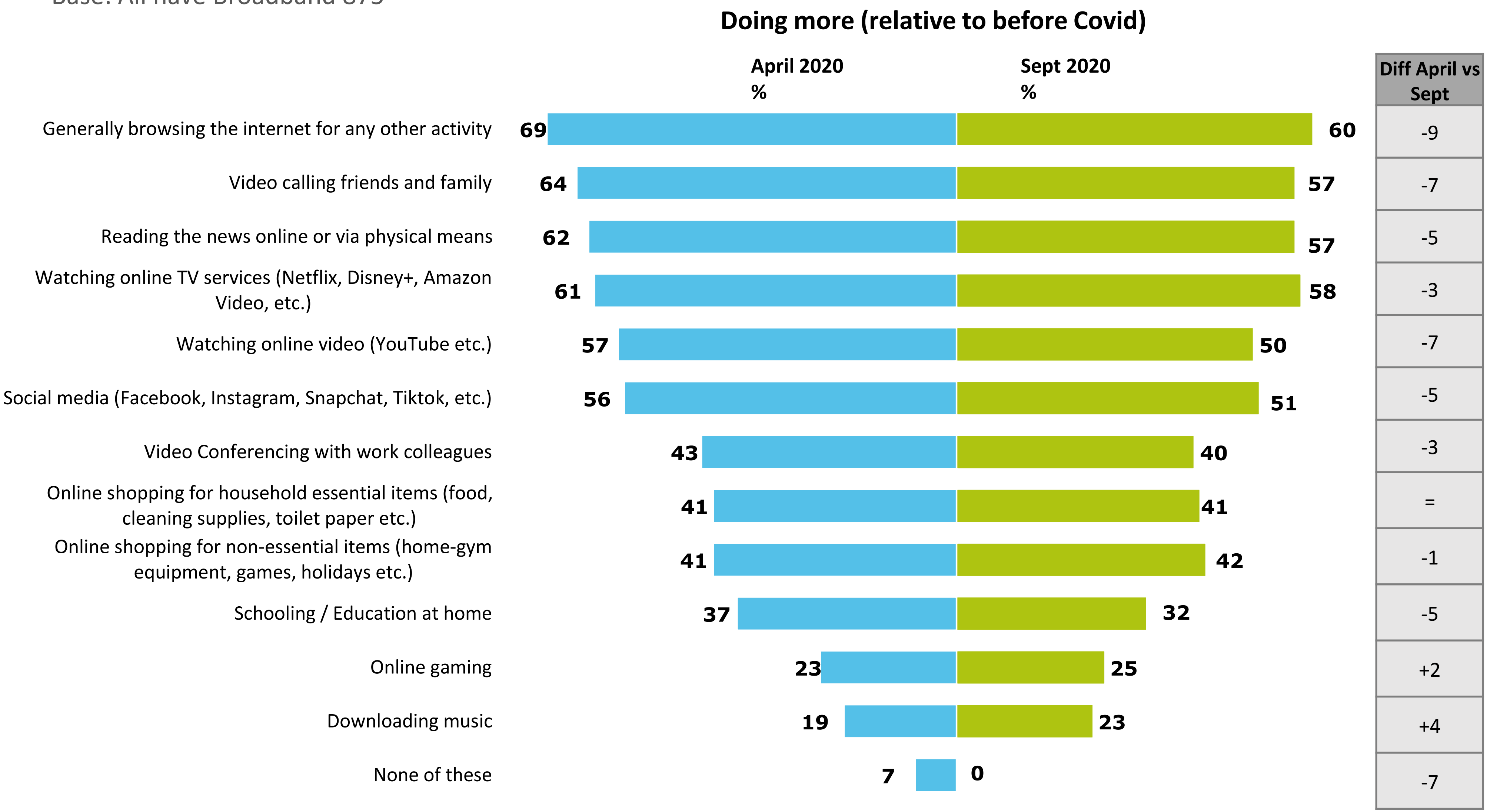
Base: All have BB - 875



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?

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

Base: All have Broadband 875



Q.29 Has your usage of these online activities increased, decreased or remained the same since the start of the ongoing Covid-19 pandemic

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

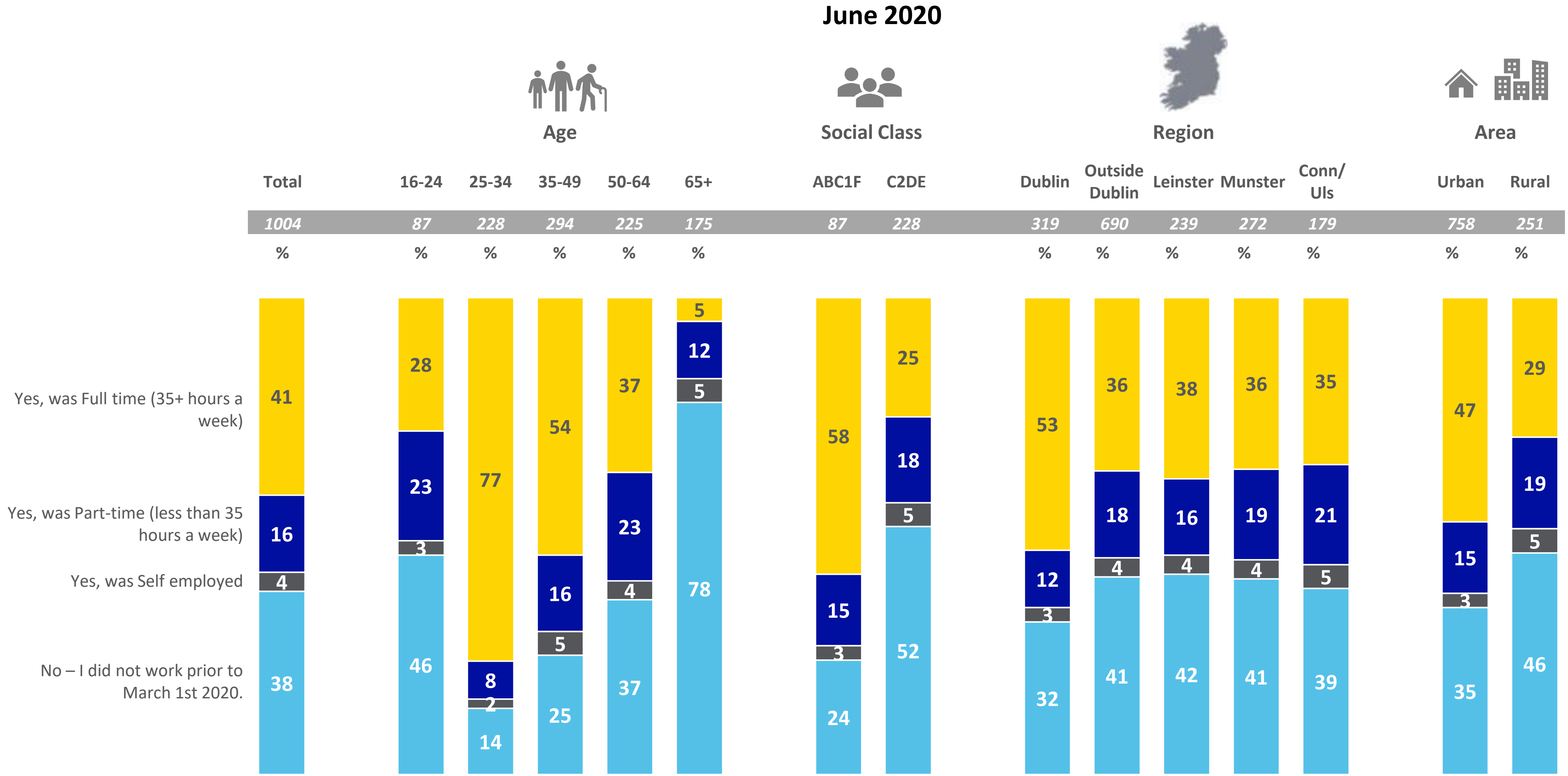
Base: All have Broadband 875

% More	Total	Age					Social Class		Region					Area	
		16-24	25-34	35-49	50-64	65+	ABC1F	C2DE	Dublin	Outs-ide Dublin	Lein-ster	Mun-ster	Conn/Ulster	Urban	Rural
UNWTD	875	70	205	247	194	159	451	424	298	577	202	232	143	687	188
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Online shopping for household essential items (food, cleaning supplies, toilet paper etc.)	41	46	49	47	31	34	43	39	47	38	39	35	43	42	39
Online shopping for non-essential items (home-gym equipment, games, holidays etc.)	42	61	54	47	34	22	49	36	47	41	40	41	40	44	39
Schooling / Education at home	32	56	30	50	18	7	36	28	30	33	36	30	33	31	34
Video calling friends and family	57	73	60	59	56	43	65	49	62	55	57	51	58	61	48
Video Conferencing with work colleagues	40	64	52	45	31	15	55	25	47	37	42	33	35	44	32
Social media (Facebook, Instagram, Snapchat, Tiktok, etc.)	51	65	57	53	45	40	53	49	53	50	47	53	50	52	48
Online gaming	25	43	34	30	15	7	30	20	29	23	27	20	23	27	20
Downloading music	23	38	33	21	21	10	28	18	26	22	21	22	24	25	19
Watching online TV services (Netflix, Disney+, Amazon Video, etc.)	58	75	68	64	52	35	64	51	62	56	54	53	65	60	53
Watching online video (YouTube etc.)	50	69	59	54	45	30	55	46	51	50	50	46	58	50	53
Reading the news online or via physical means	57	64	59	58	54	53	60	54	55	58	59	57	59	57	56
Generally browsing the internet for any other activity	60	69	65	58	60	52	64	56	62	59	57	60	60	60	58
None of these	9	4	3	9	8	19	7	11	7	10	11	11	6	8	12

Q.29 Has your usage of these online activities increased, decreased or remained the same since the start of the ongoing Covid-19 pandemic

Prior to 1st March 2020 more than 3 in 5 were working

Base: All adults 16+ 1009

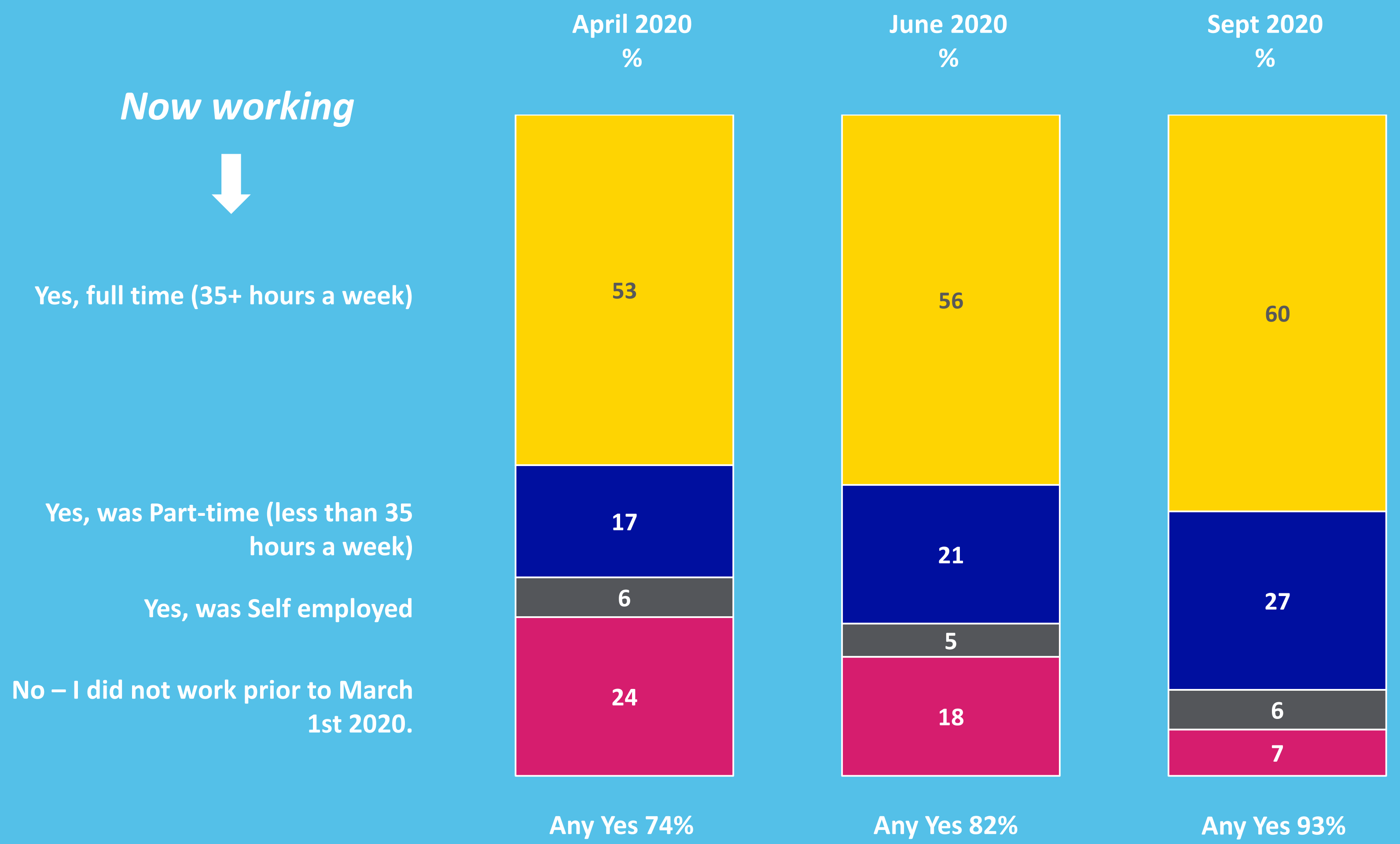


	Total	16-24	25-34	35-49	50-64	65+	ABC1F	C2DE	Dublin	Outside Dublin	Leinster	Munster	Conn/ Uls	Urban	Rural
Sept '20 Any Yes	62	54	86	75	63	22	76	48	68	59	58	59	61	65	54
June '20 Any Yes	62	65	83	80	59	14	81	43	68	59	57	59	63	65	57
April '20 ANY YES	63	59	84	78	66	17	80	45	65	62	61	62	62	65	58

Q.30 Prior to March 1st were you working?

Now just under 1 in 10 of workers are still no longer working - but those working part-time and full-time is increasing over the months

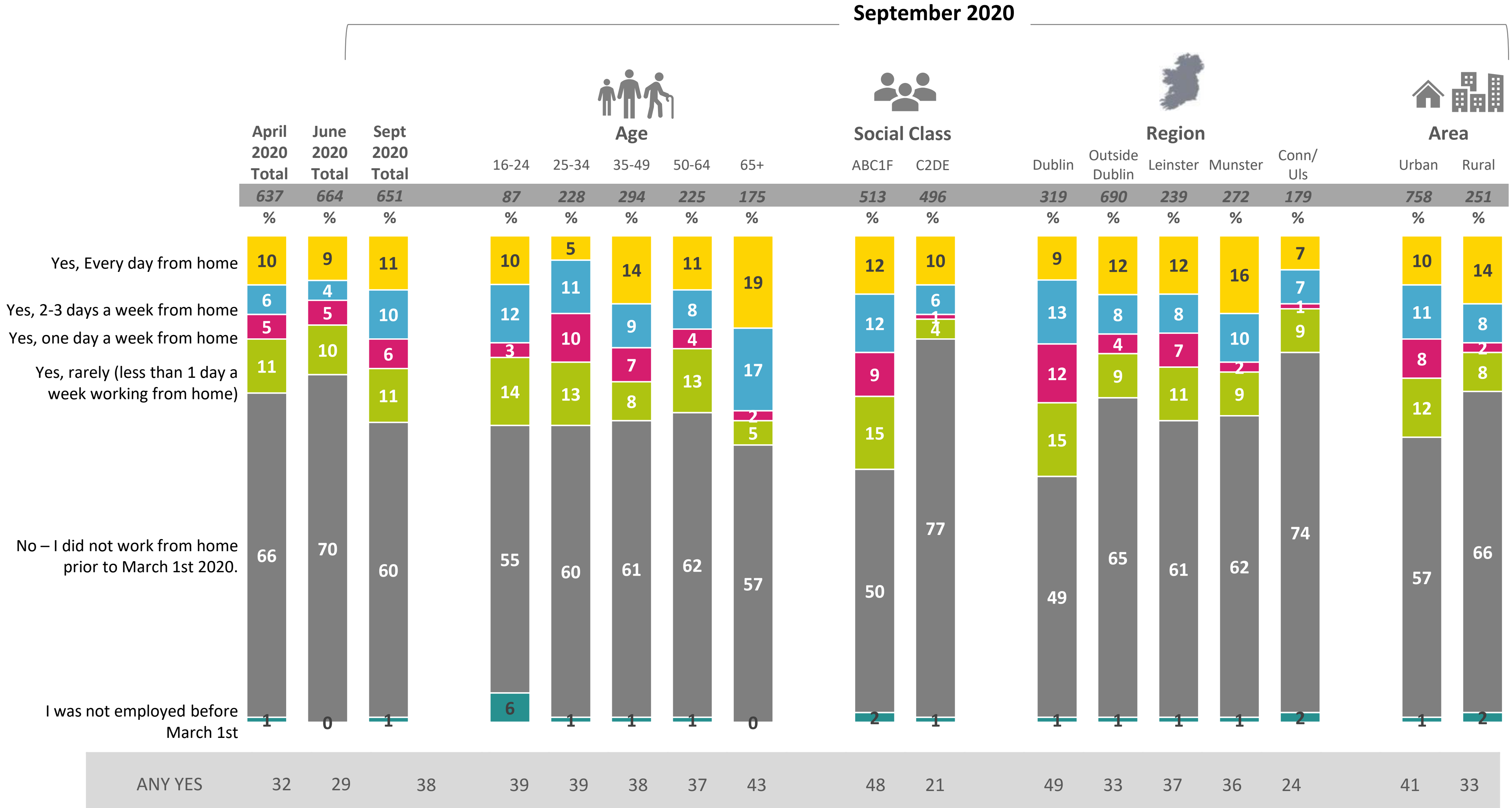
Base: All working prior to March 1st: 607



Q.31 And now are you working?

About 1 in 3 of those now working, worked from home to some degree prior to 1st March 2020

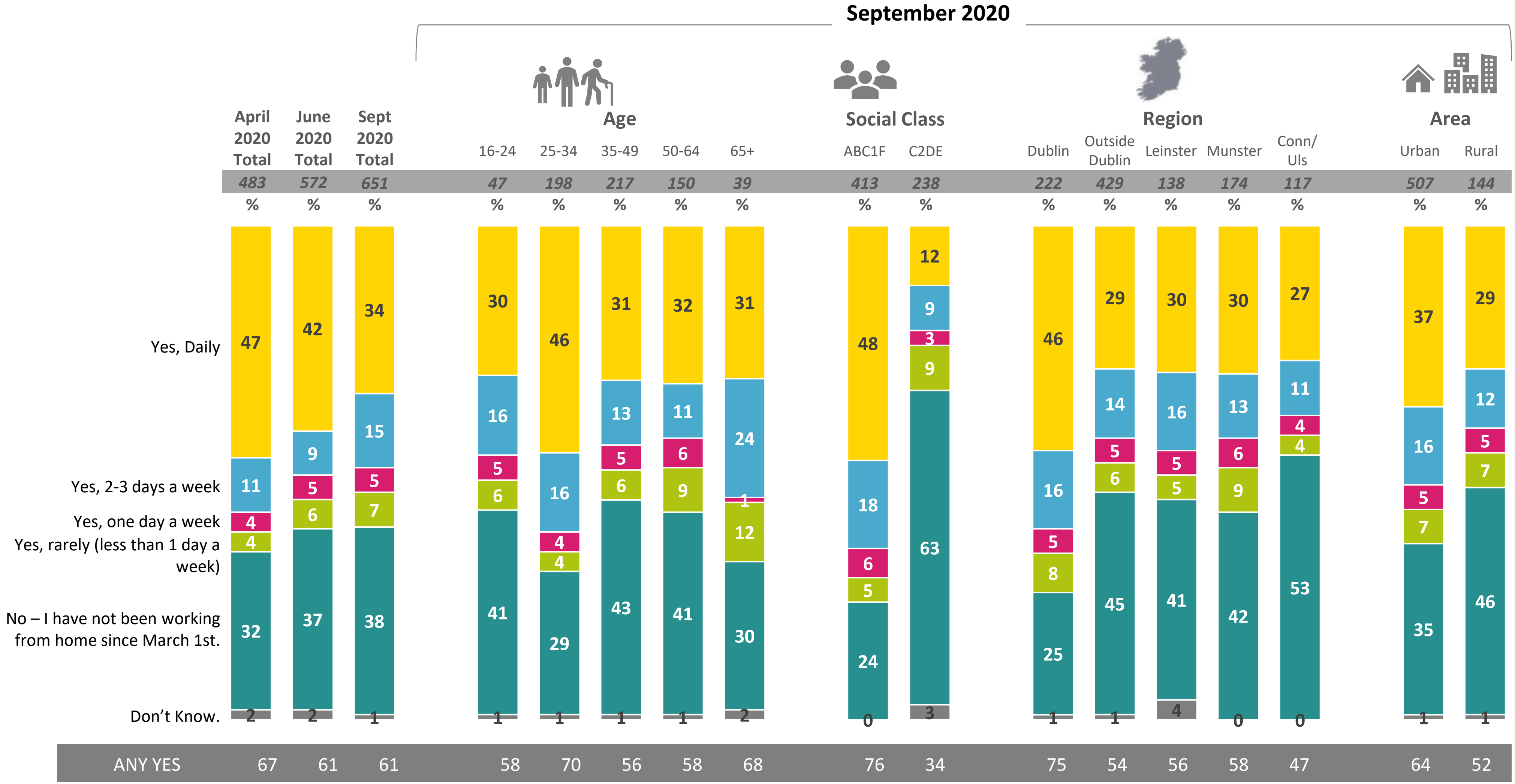
Base: All working now: 651



Q.32 Prior to March 1st, did you regularly work from home (using a PC, laptop, tablet and/or mobile phone to undertake your normal work while at home)

3 in 5 of all those now working are working from home to some degree (was 67% in April)

Base: All currently working 651



Q.33 Since March 1st, have you begun to work from home (using a PC, laptop, tablet and/or mobile phone to undertake your normal work while at home) due to the ongoing Covid-19 pandemic.

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

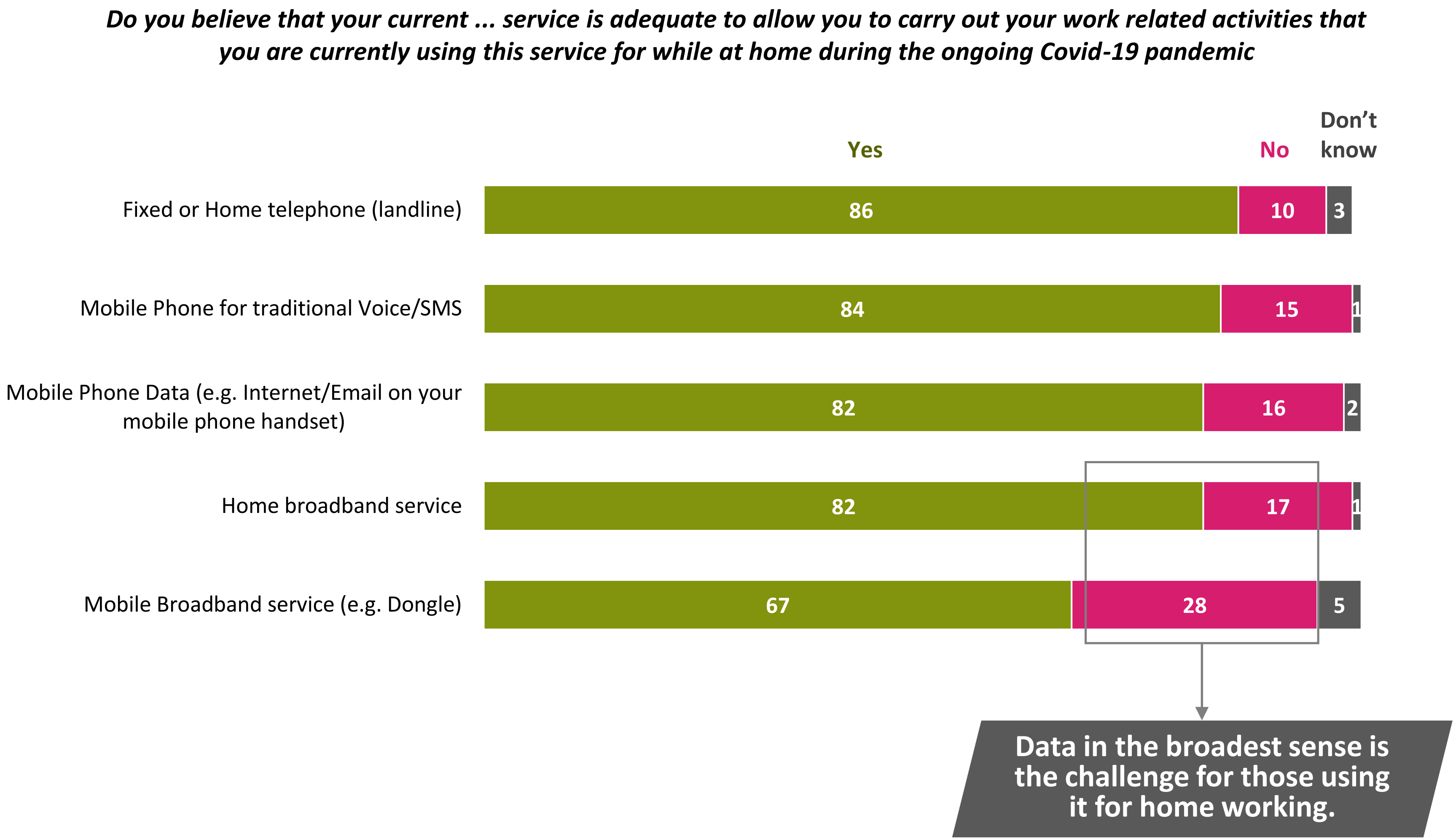
Base: All working now 405

	Total	Age		Social Class		Region		Area	
		16-34	35+	ABC1F	C2DE	Dublin	Outside Dublin	Urban	Rural
UNWTD	405	168	237	322	83	170	235	328	77
	%	%	%	%	%	%	%	%	%
Fixed or Home telephone (landline)	15	9	19	14	19	15	15	16	13
Mobile Phone for traditional Voice/SMS	50	41	56	53	39	53	48	52	46
Mobile Phone Data (e.g. Internet/Email on your mobile phone handset)	46	45	47	47	44	51	44	47	45
Home broadband service	74	77	73	79	58	82	69	80	60
Mobile Broadband service (e.g. Dongle)	12	14	11	9	22	5	16	9	20

Q.34 Which of the following services do you use to carry out your work-related activities while at home during the ongoing Covid-19 pandemic?

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

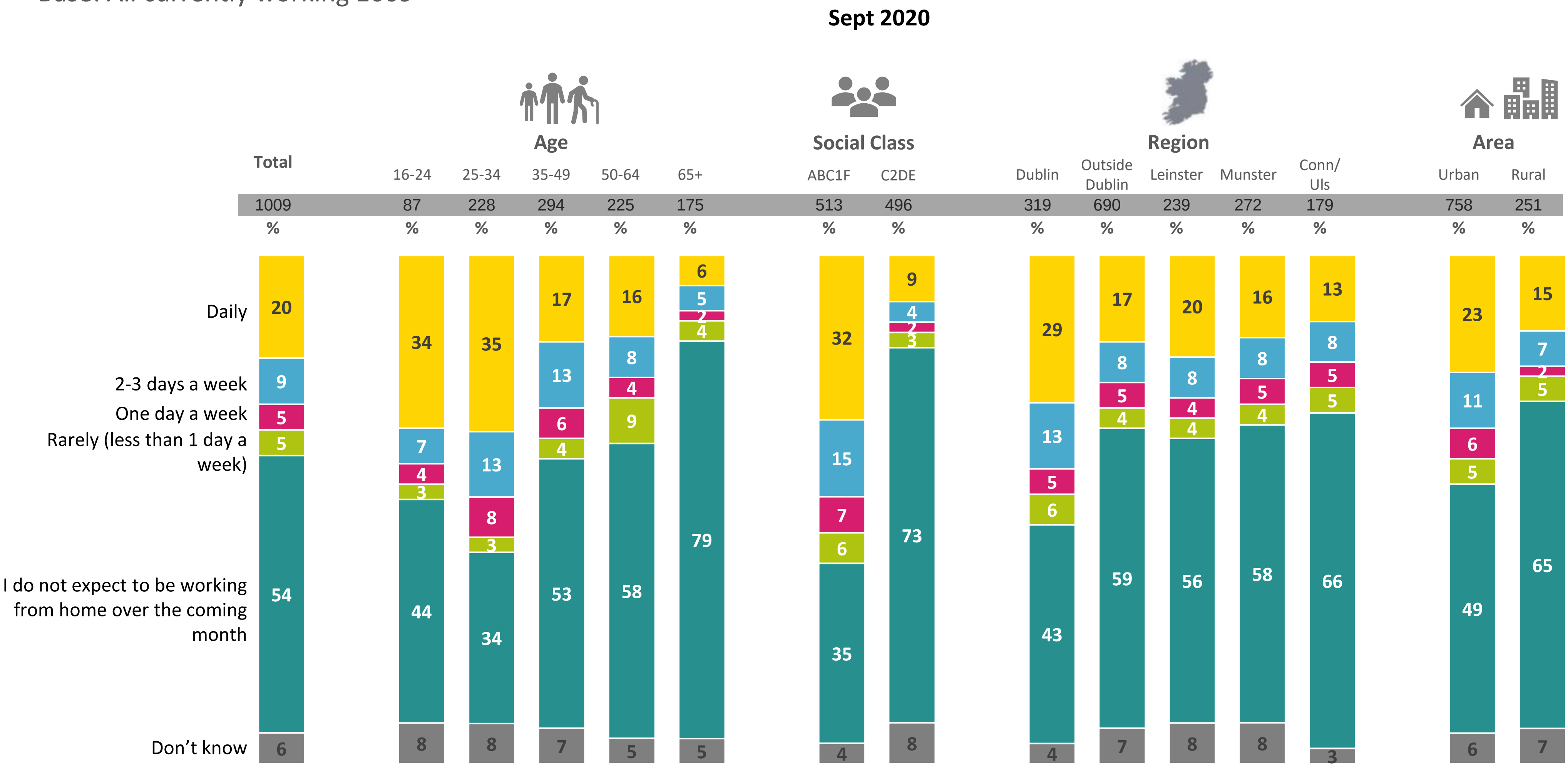
Base: All using each service at home for work



*Q.35 Is the 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 1009



Q.36 For the remainder of 2020, how regularly if at all, do you expect to be working from home (using a PC, laptop or tablet to undertake your normal work)?

Key Highlights September 2020

COVID - 19

- Similar to June 2020 about half in September 2020 will be **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 and middle classes which tend to rely on broadband more.
- While about **3 in 5** perceive their broadband to be about the same as the start of the COVID 19 pandemic, 1 in 5 believe it to be worse, with about 1 in 5 also believing it to be better.
- 72% In terms of household perception of home broadband usage since the start of the ongoing COVID 19 pandemic, 72% feel that its household has **increased its home broadband usage** with only 24% claiming it has remained the same. The increased figure is 61% in April 2020, thus people are continuing to expand their broadband usage at home since COVID.
- In terms of online usage and activities since the 1st of March 2020 those doing more relative to before COVID is still strong especially around generally internet browsing, video calling, news and streaming services. Some slight softening versus April figures (at the height of the pandemic).
- In terms of working we see, as we progress through the pandemic **a gradual return to full time hours** wave on wave.
- Amongst those working now, about **1 in 10 work everyday from home**, while those working at least one day a week from home stands at just over a quarter of those now working. Working from home is significantly stronger amongst more professional and middle-class individuals and 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.
- About a third of those currently working expect to be **working at least one day a week from home** for the remainder of 2020.