An Coimisiún um
Rialáil Cumarsáide
Commission for
Communications Regulation

Impact of Covid-19 on Home Broadband use in Ireland

April 2020

ComReg Doc 20/35

B&A RESEARCH & INSIGHT

Methodology

- The questionnaire was included on one wave of the Behaviour & Attitudes online barometer survey. This survey is administered online to a sample of 1,049 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 8th – 18th April 2020, after the Covid-19 restrictions were introduced (March 28th).

NOTES:

ComReg notes this survey relates to household broadband access. We recognise that the term "household's usage of your home broadband" may not capture individuals for whom their mobile phone is their primary means of accessing the internet.

9 in 10 of this digital sample have a fixed home broadband service

Base: All respondents aged 16+ - 1046

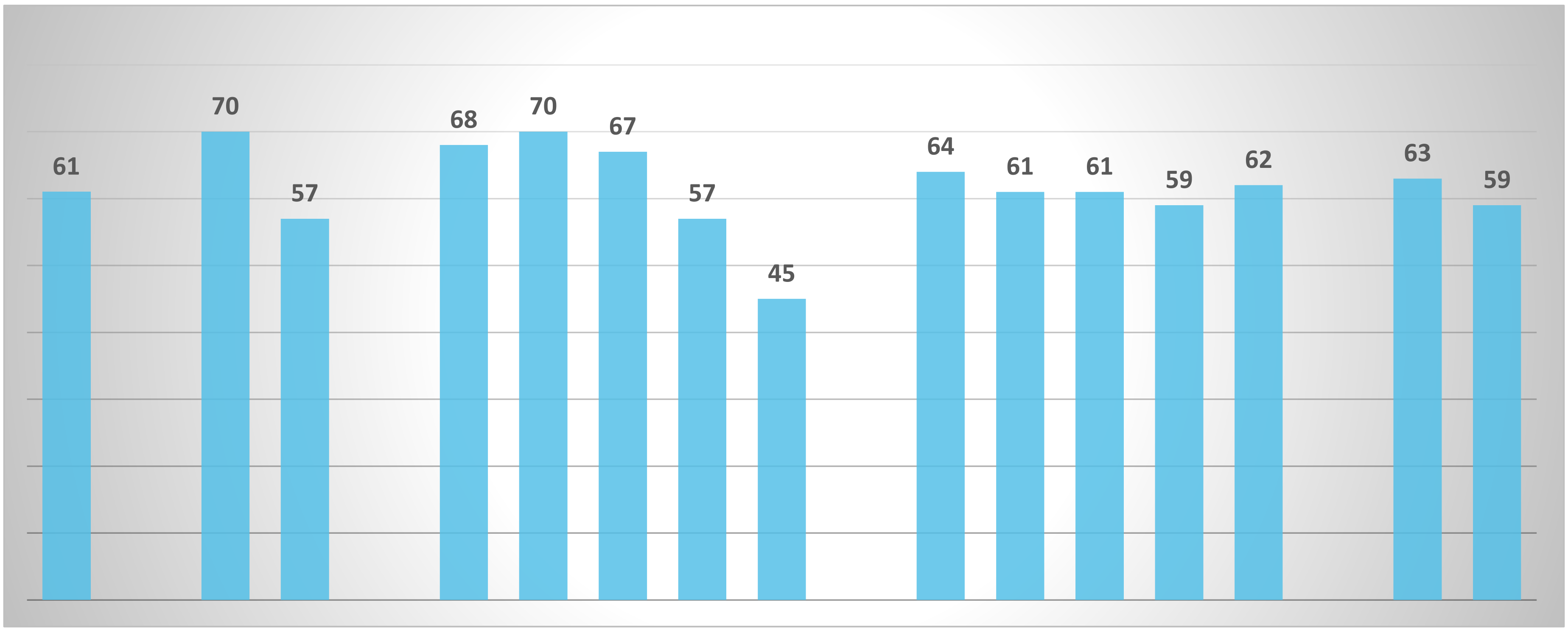
Q.1 Do you have a home broadband service? (that is, one connected to a phone line, a fibre connection or Cable TV provider)?

Impact of Covid-19 on home broadband

3 in 5 broadband users have seen an increase in the usage of their home broadband service since March 1st 2020

Base: All have Broadband 932

Total	Kids in HHold		Age					Region					Area	
	Yes	No	16-24	25-34	35-49	50-64	65+	Dublin	Outside Dublin	Leinster	Munster	Conn/ Ulster	Urban	Rural
932	*331*	*596*	*83*	*177*	*294*	*211*	*167*	*279*	*653*	*241*	*255*	*157*	*671*	*261*
%	%	%	%	%	%	%	%	%	%	%	%	%	%	%

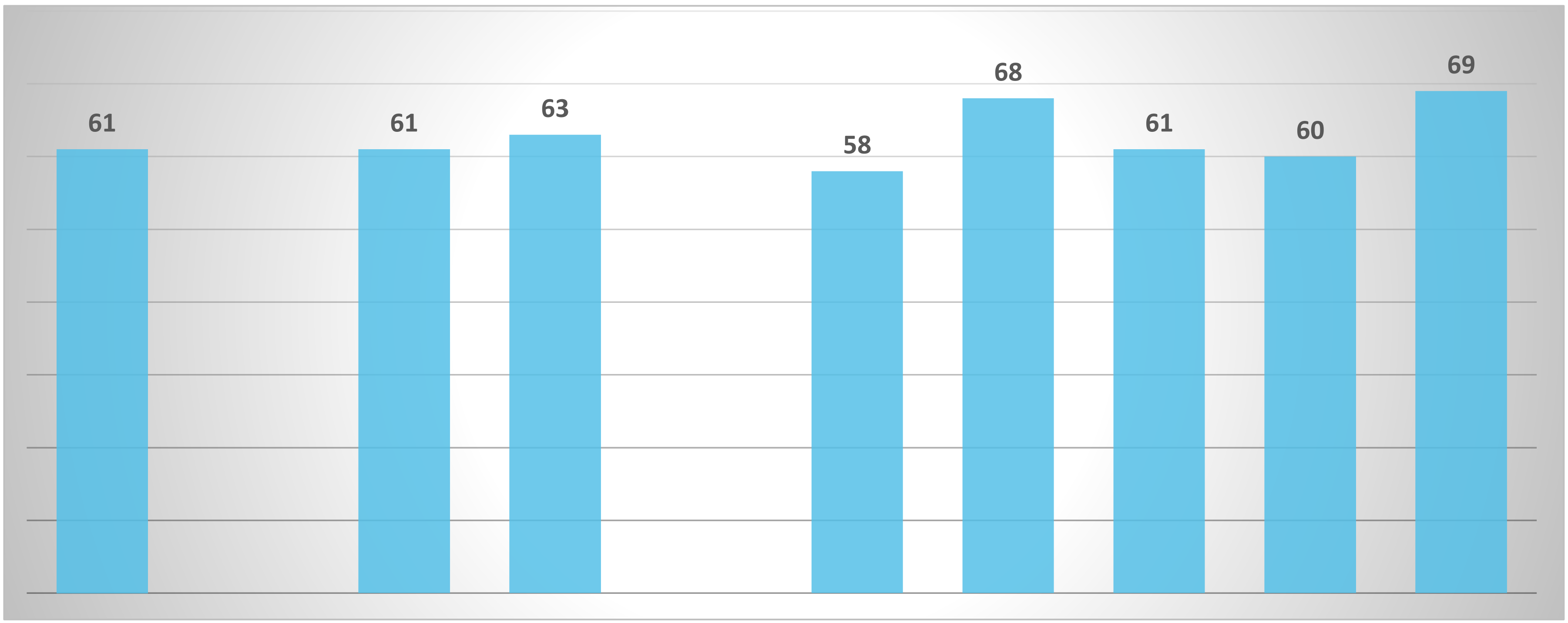


Q.21 Do you think your household's usage of your home broadband has changed (increased or decreased) since March 1st?

Increase of usage of home broadband service since March 1st 2020 x BB provider/Bundle/BB Used

Base: All have Broadband 932

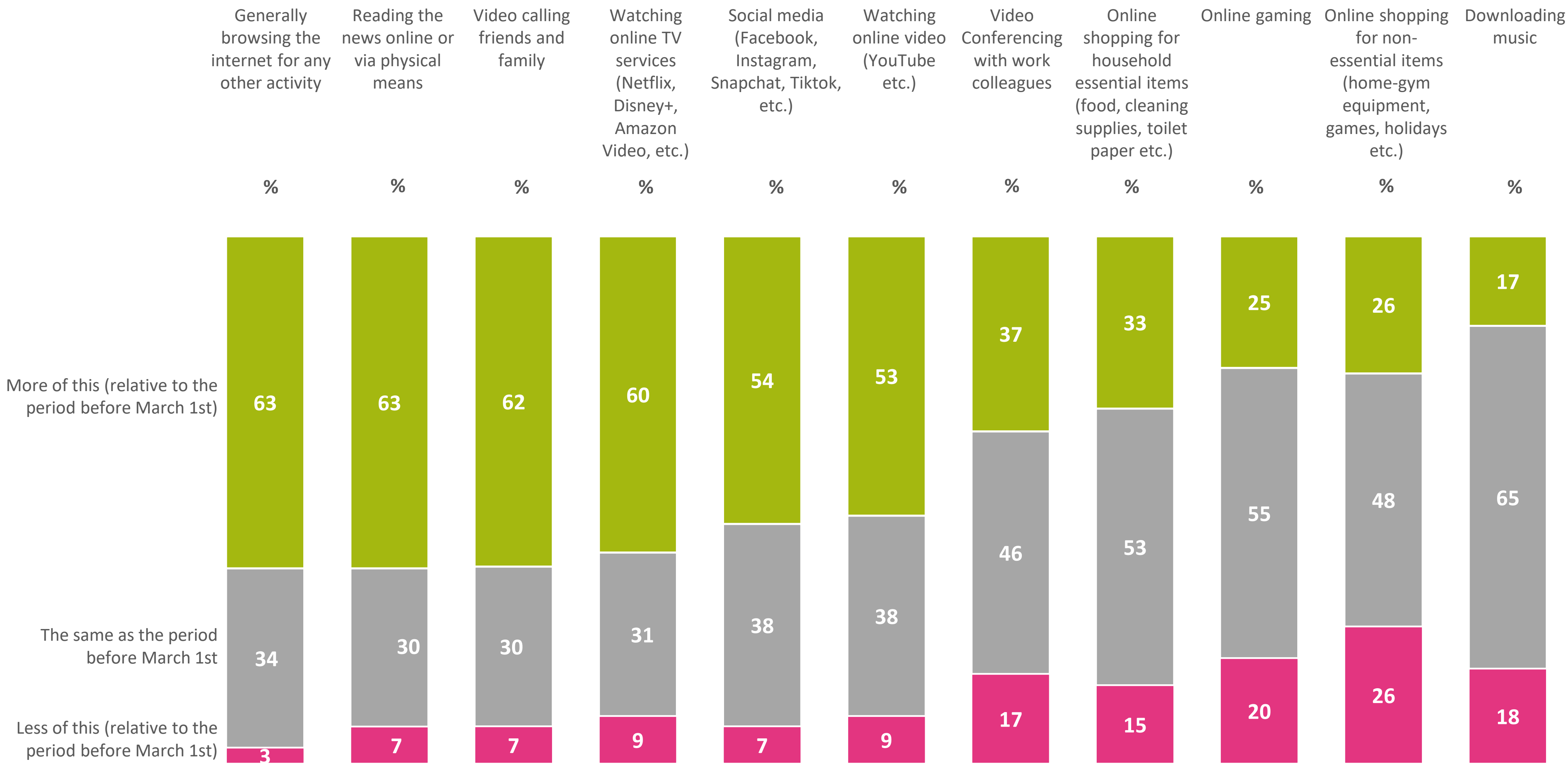
	Bundle		Broadband Used				
Total	Yes	No	BB via trad home/ landline	BB via cable TV network	BB over Fibre network	MBB by mobile network provider	Fixed wireless BB
932	584	326	300	206	310	46	45
%	%	%	%	%	%	%	%



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

Usage of Online activities since 1st of March 2020

Base: All have Broadband 932



Net diff	60	56	55	51	47	44	20	18	5	=	-1

General browsing of the internet has seen the biggest increase in activity since March 1st, followed by reading of online news and video calling friends and family.

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****? Randomise list*

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

Base: All have Broadband 932

	Total	Age				
		16-24	25-34	35-49	50-64	65+
UNWTD	***932***	***83***	***177***	***294***	***211***	***167***
	%	%	%	%	%	%
Reading the news online or via physical means	63	59	71	67	60	53
Generally browsing the internet for any other activity	63	72	73	64	60	48
Video calling friends and family	62	75	69	66	55	50
Watching online TV services (Netflix, Disney+, Amazon Video, etc.)	60	76	72	64	55	38
Social media (Facebook, Instagram, Snapchat, Tiktok, etc.)	54	74	62	53	51	39
Watching online video (YouTube etc.)	53	70	67	60	42	32
Video Conferencing with work colleagues	37	62	42	41	31	15
Online shopping for household essential items (food, cleaning supplies, toilet paper etc.)	33	38	44	27	28	32
Online shopping for non-essential items (home-gym equipment, games, holidays etc.)	26	38	41	26	19	12
Online gaming	25	52	31	29	13	7
Downloading music	17	33	17	16	15	7
None of these	9	3	4	9	8	17

The under 35s are most likely to have increased their online activity since March 1st.

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**? Randomise list

Usage of Online activities since 1st of March 2020 x BB provider/Bundle/BB Used

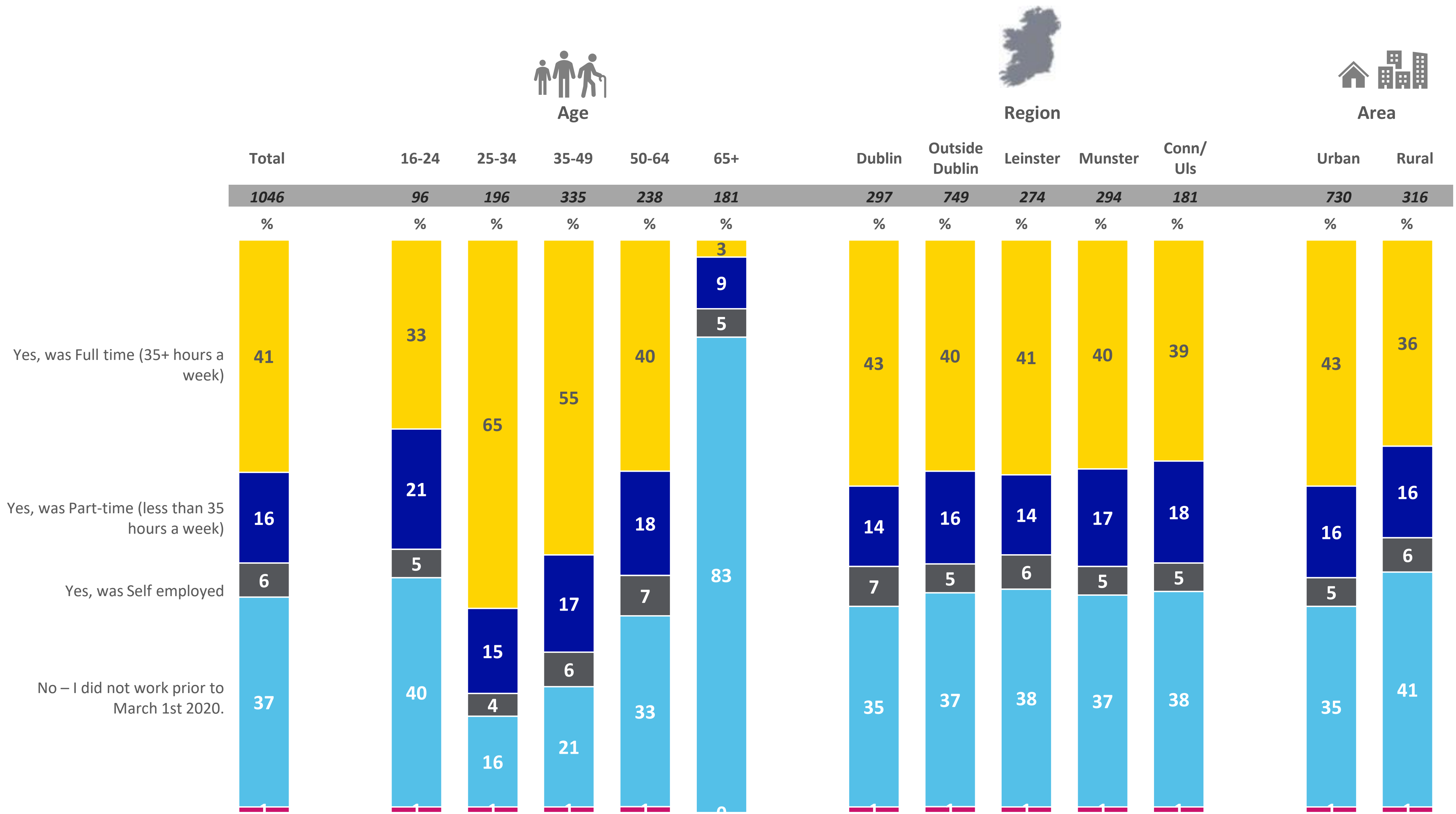
Base: All have Broadband 932

	Total	Bundle		Region					Area	
		Yes	No	Dublin	Outside Dublin	Leinster	Mun-ster	Conn/Ulster	Urban	Rural
UNWTD	***932***	***584***	***326***	***279***	***653***	***241***	***255***	***157***	***671***	***261***
	%	%	%	%	%	%	%	%	%	%
Reading the news online or via physical means	63	62	64	65	61	64	64	54	64	60
Generally browsing the internet for any other activity	63	63	63	67	61	60	63	59	65	57
Video calling friends and family	62	63	62	66	60	62	61	57	66	54
Watching online TV services (Netflix, Disney+, Amazon Video, etc.)	60	60	62	65	58	57	58	61	64	52
Social media (Facebook, Instagram, Snapchat, Tiktok, etc.)	54	54	57	54	55	58	54	51	55	52
Watching online video (YouTube etc.)	53	53	55	56	52	52	51	53	54	51
Video Conferencing with work colleagues	37	37	36	47	33	36	33	27	41	29
Online shopping for household essential items (food, cleaning supplies, toilet paper etc.)	33	34	29	37	31	30	32	30	34	30
Online shopping for non-essential items (home-gym equipment, games, holidays etc.)	26	24	26	28	25	24	26	23	26	26
Online gaming	25	23	28	36	20	20	21	17	29	15
Downloading music	17	16	17	21	15	14	18	12	18	13
None of these	9	9	8	7	10	8	9	12	7	12

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**? Randomise list

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

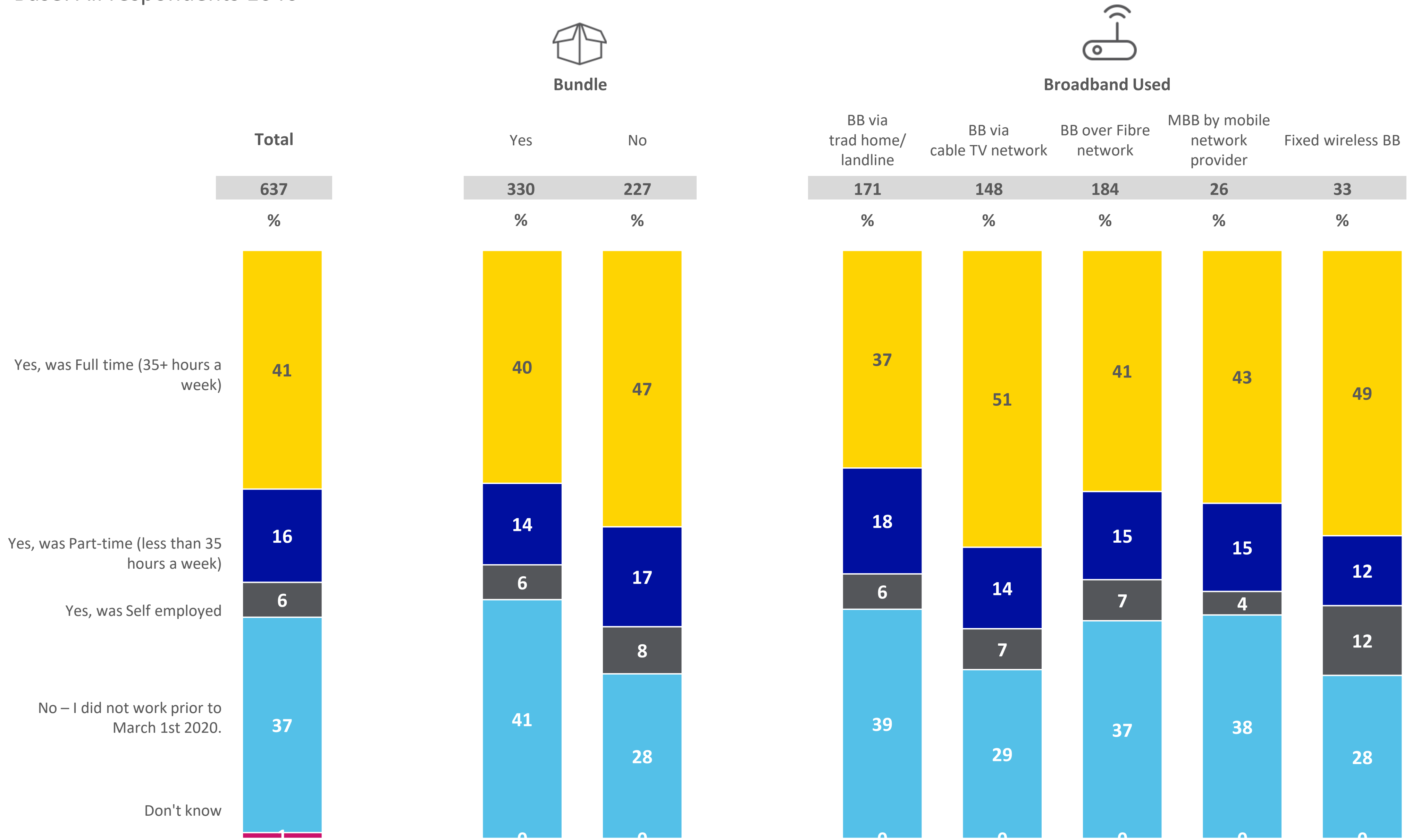
Base: All respondents 1046



Q23 Prior to March 1st were you working?

Work status prior to 1st March 2020 x BB provider/Bundle/BB Used

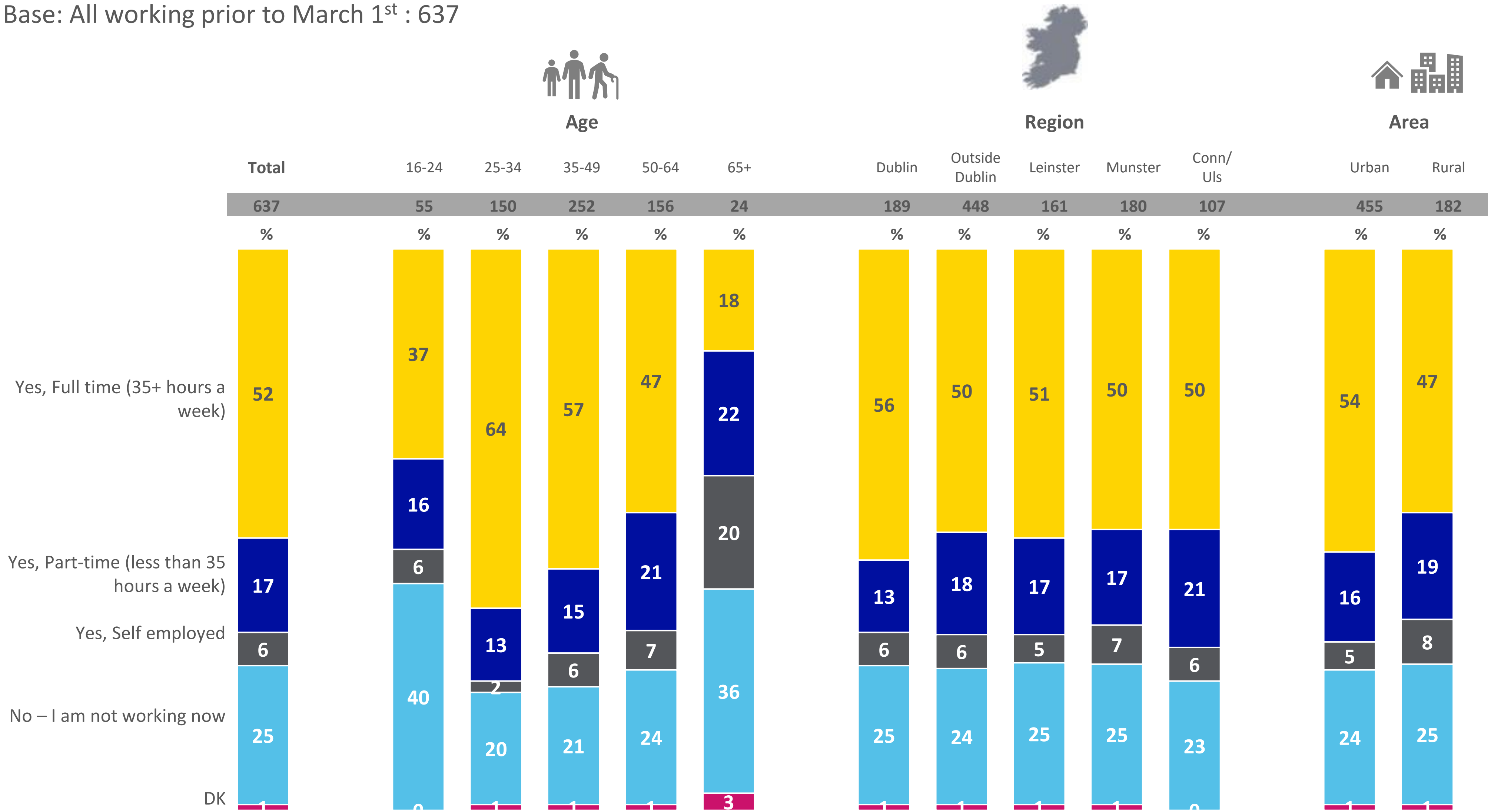
Base: All respondents 1046



Q23 Prior to March 1st were you working?

Since 1st March 2020 one quarter of workers are no longer working

Base: All working prior to March 1st : 637

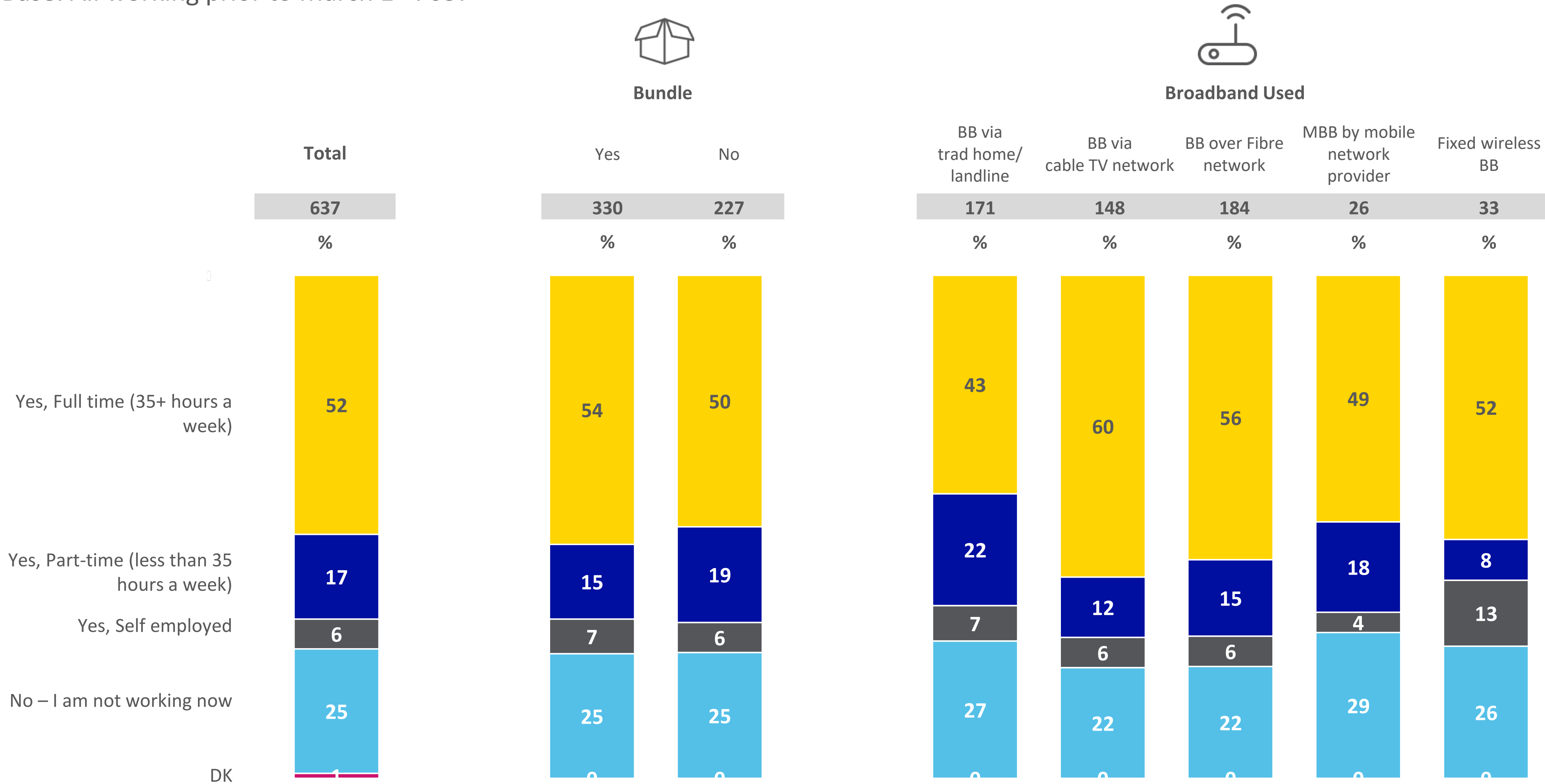


The under 25 and 65+ age groups are the least likely to be working since March 1st. No variation across regions.

Q.24 And now are you working?

Work status since 1st March 2020 x BB provider/Bundle/BB Used

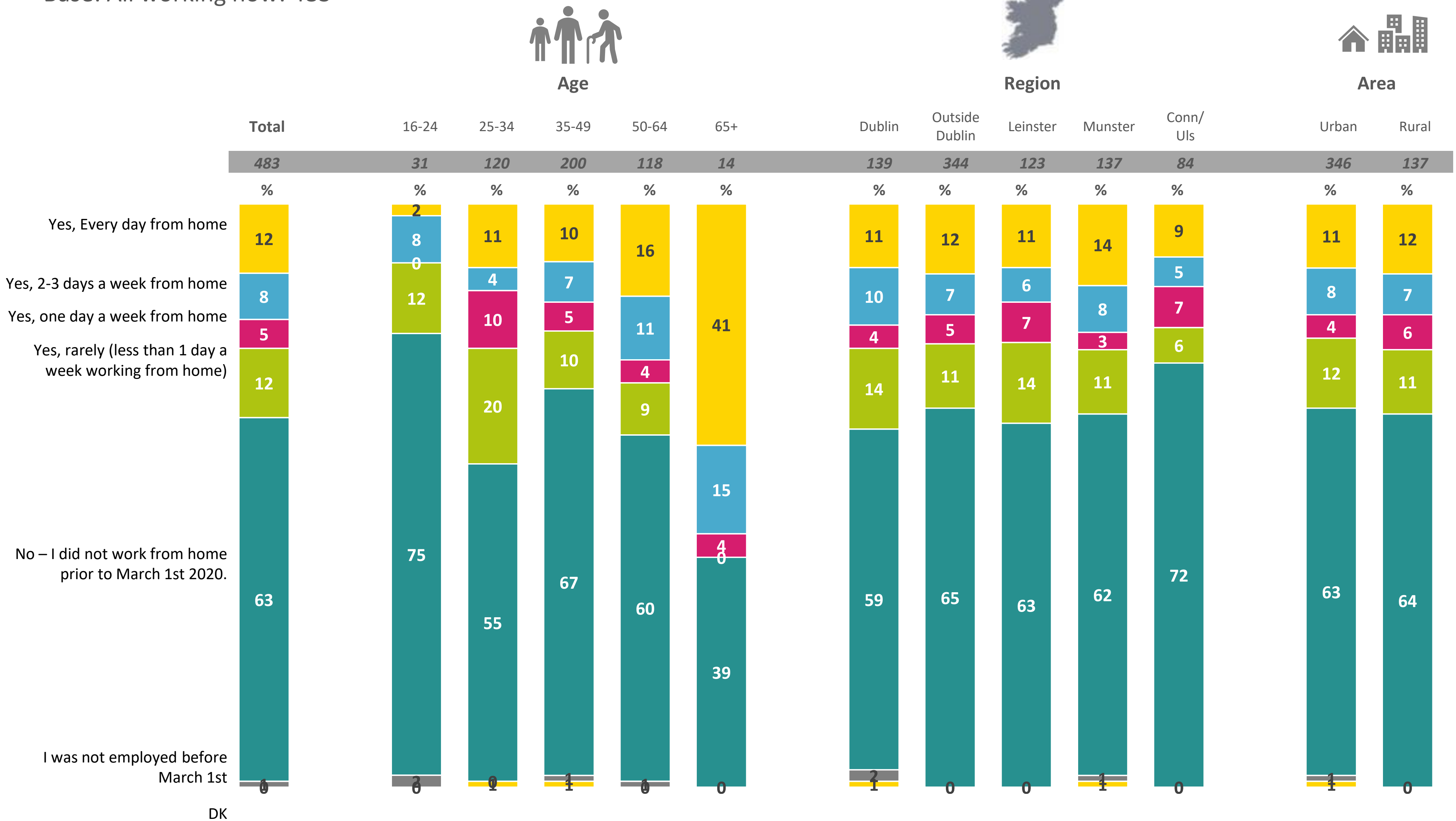
Base: All working prior to March 1st : 637



Q.24 And now are you working?

Over one third of all workers worked from home to some degree prior to 1st March 2020

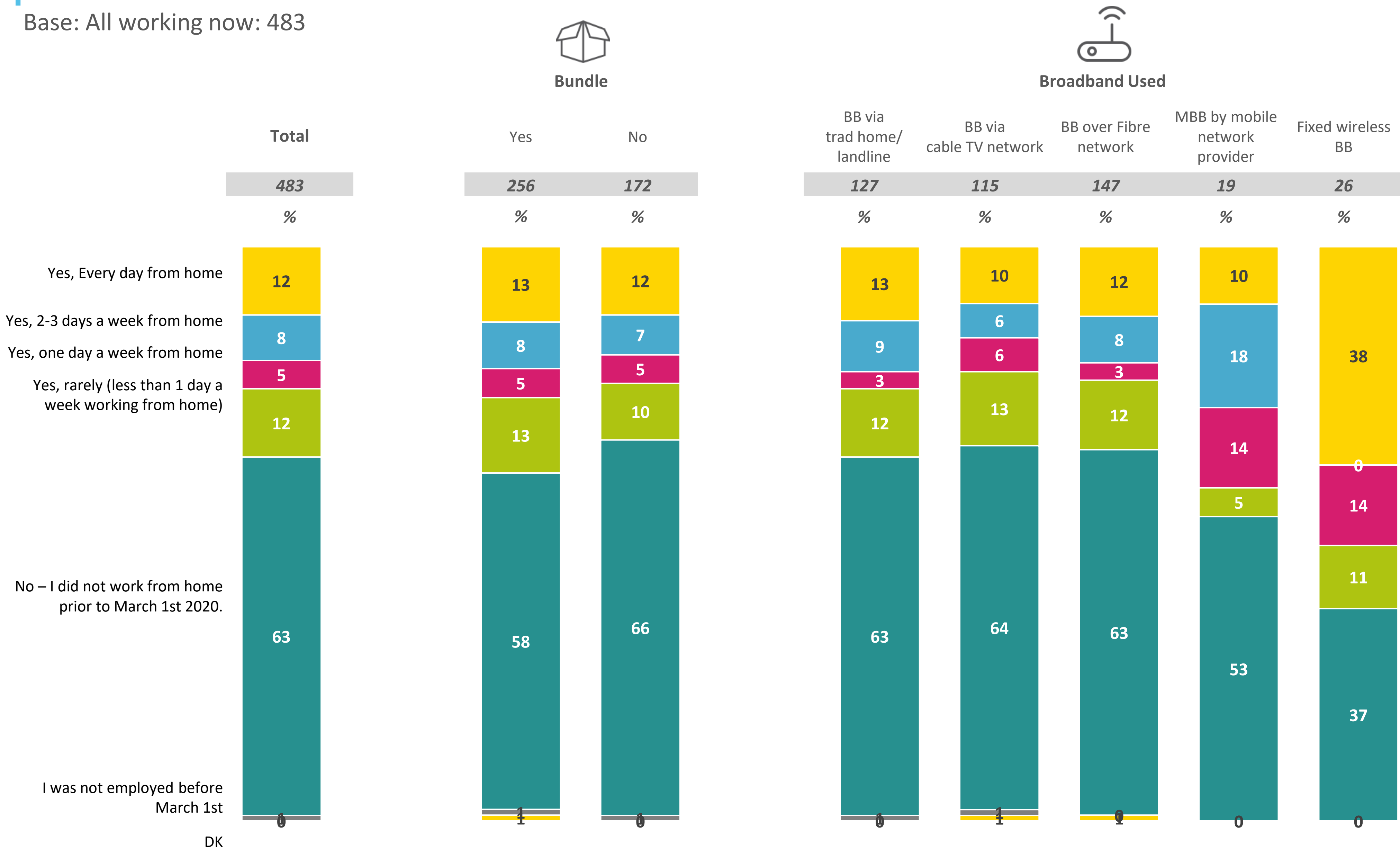
Base: All working now: 483



Q.25 Prior to March 1st, did you regularly work from home (using a PC, laptop or tablet to undertake your normal work while at home)

Incidence of working from home prior to 1st March 2020 x BB provider/Bundle/BB Used

Base: All working now: 483



Q.25 Prior to March 1st, did you regularly work from home (using a PC, laptop or tablet to undertake your normal work while at home)

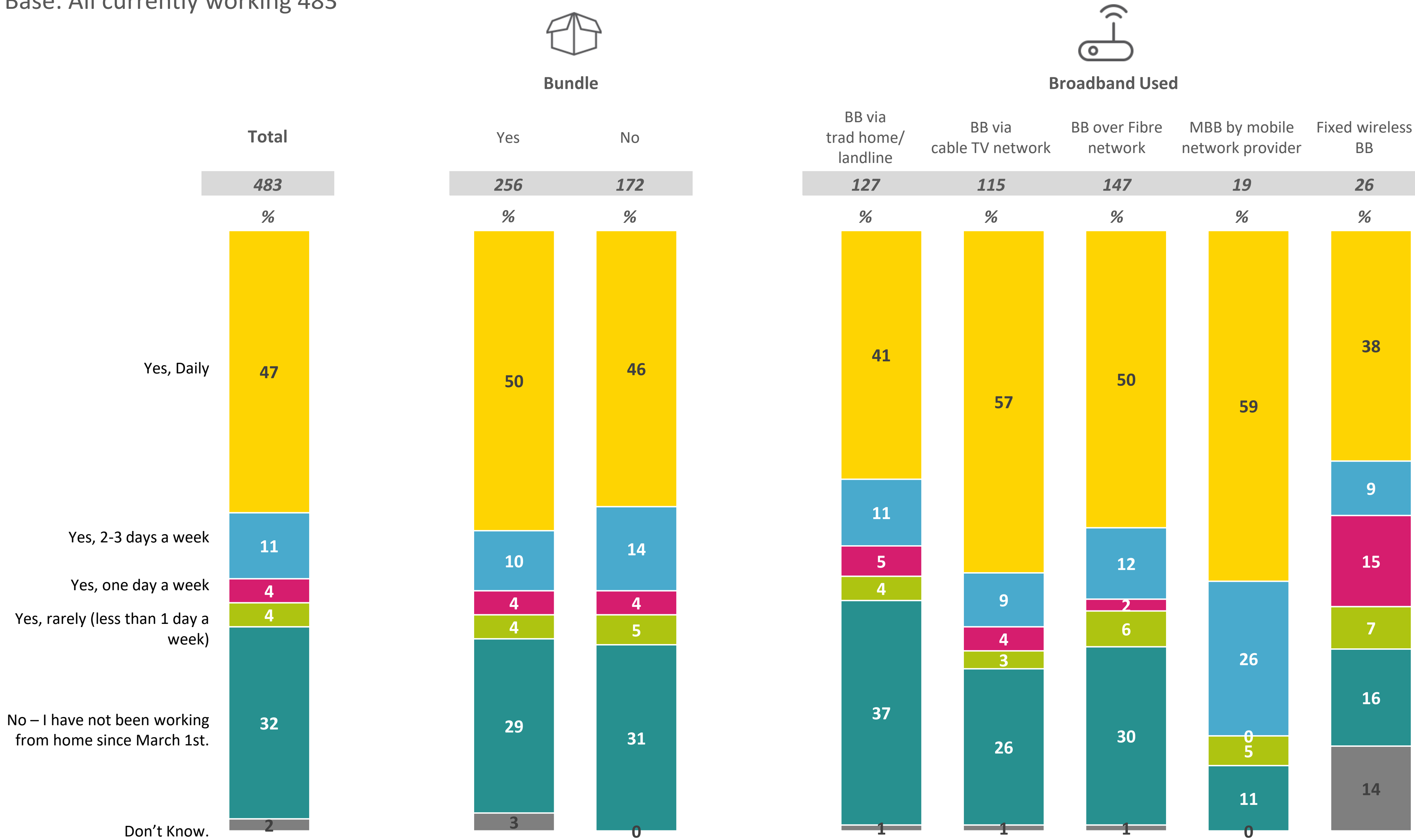
Two in three of all those still working are now working from home to some degree

Base: All currently working 483

Q.26 Since March 1st, have you begun to regularly work from home (using a PC, laptop or tablet to undertake your normal work while at home)

Currently working from home to some degree x BB provider/Bundle/BB Used

Base: All currently working 483



Q.26 Since March 1st, have you begun to regularly work from home (using a PC, laptop or tablet to undertake your normal work while at home)

74% are in agreement that home broadband is adequate for all work activities

Base: All currently working 483

Q.28 Do you believe that your current home broadband service is adequate to allow you to carry out all of your work related activities from home (using a PC, laptop or tablet to undertake your normal work while at home)?

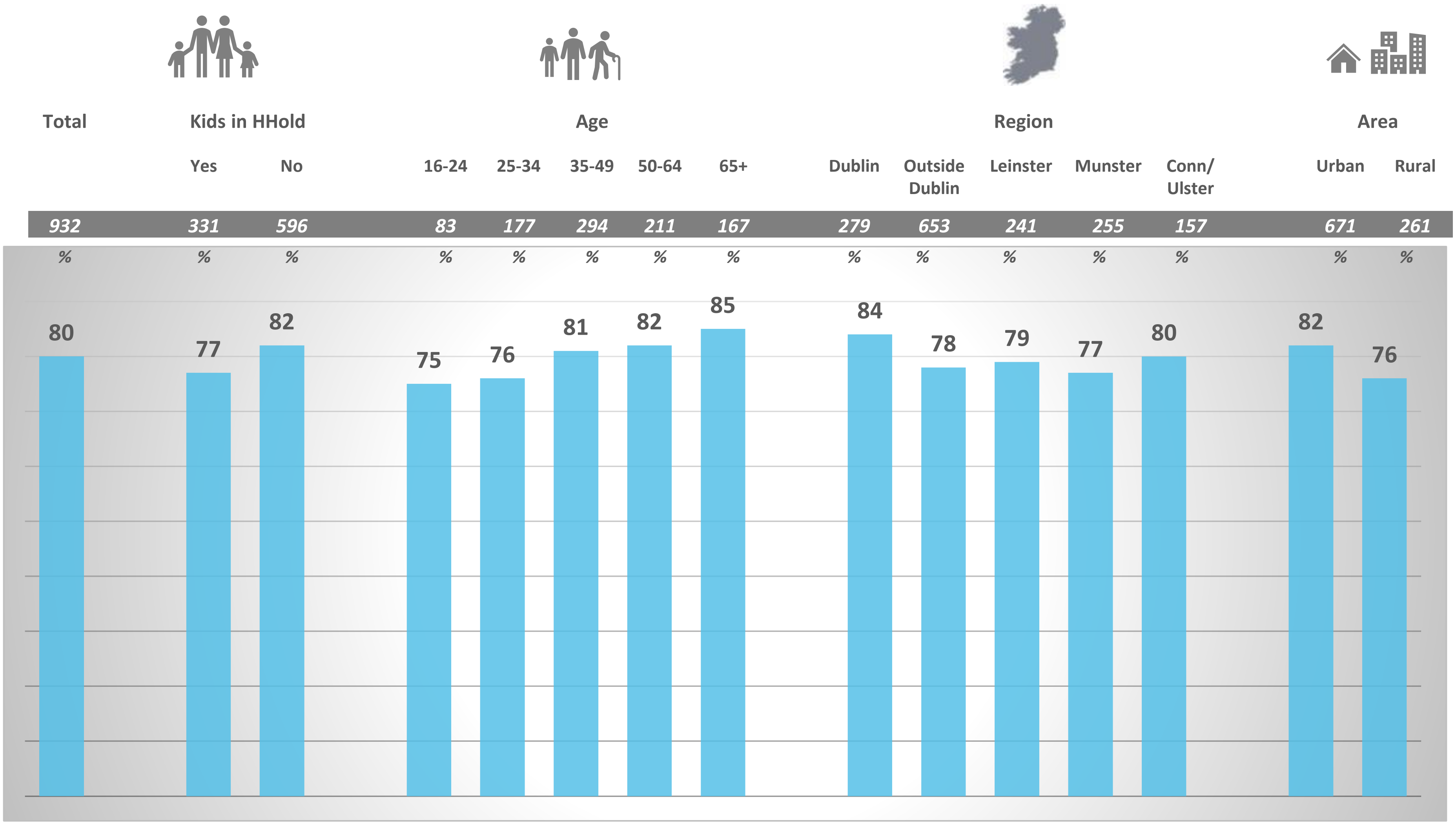
Agreement that home broadband is adequate to all work activities from home x BB provider/Bundle/BB Used

Base: All currently working 483

Q.28 Do you believe that your current home broadband service is adequate to allow you to carry out all of your work related activities from home (using a PC, laptop or tablet to undertake your normal work while at home)?

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

Base: All have broadband 932

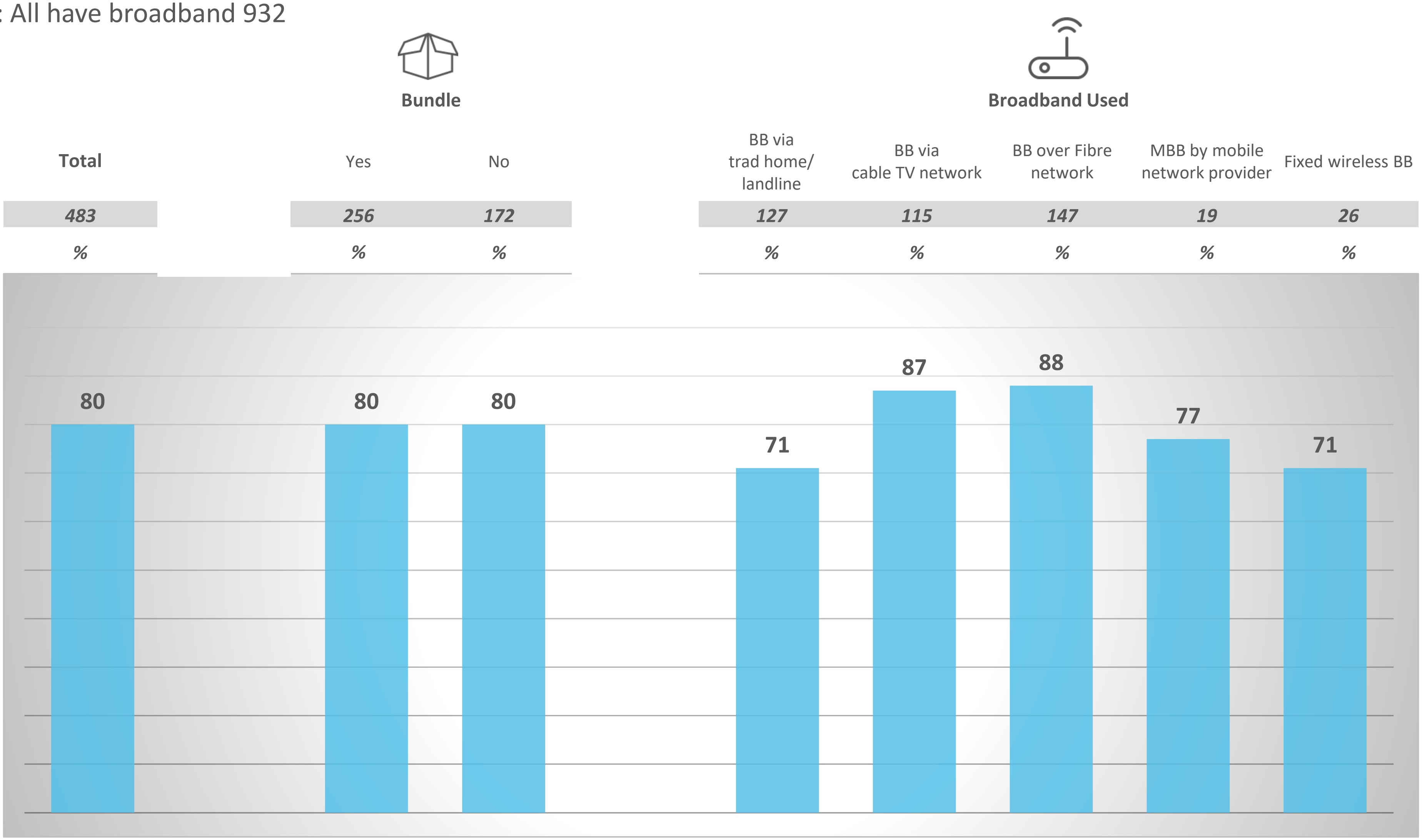


No significant differences across demographics.

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

Agreement that home broadband is adequate to meet the needs of the household x BB provider/Bundle/BB Used

Base: All have broadband 932

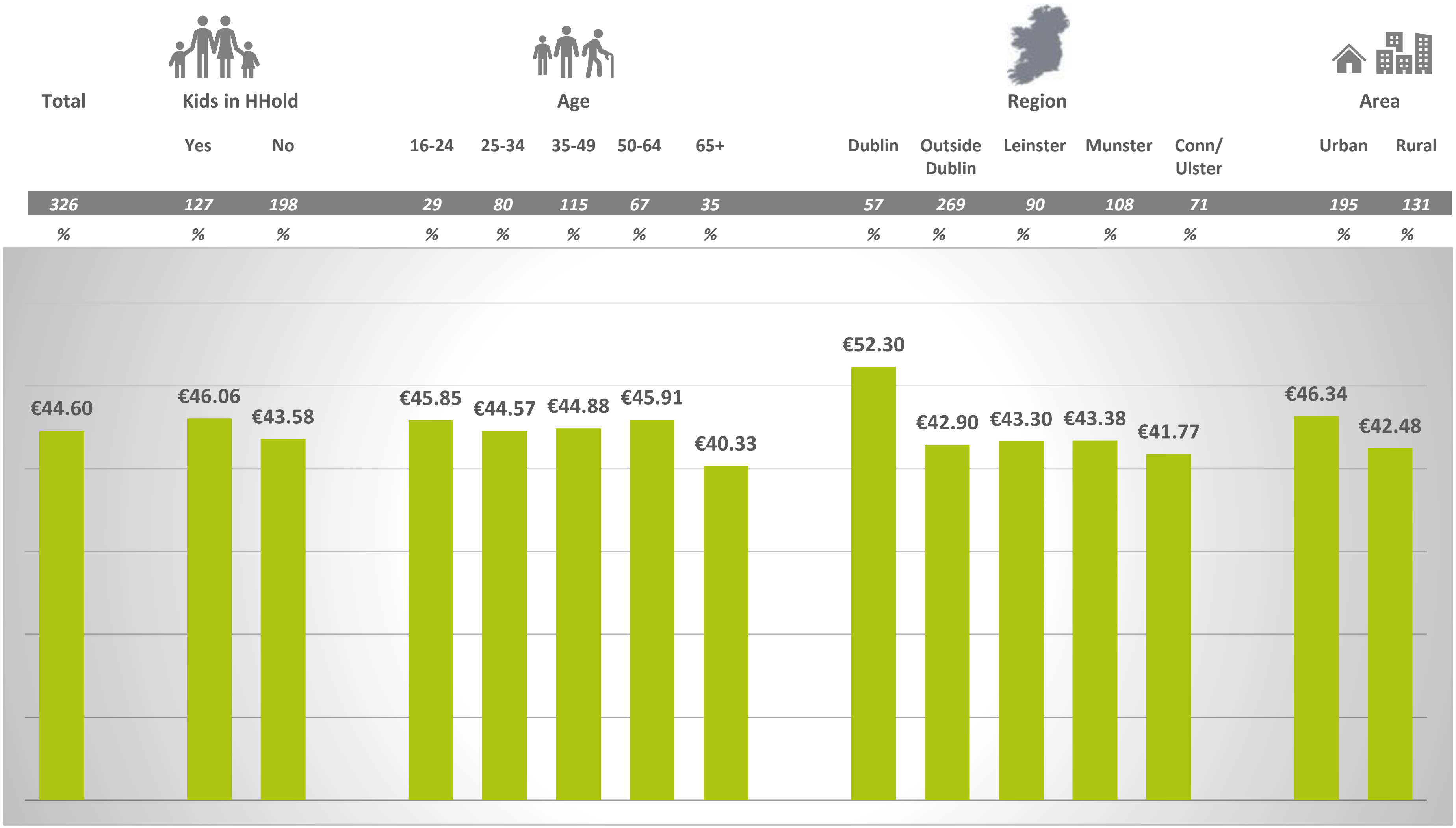


Those with cable and fibre networks are most likely to agree that their broadband is adequate to meet the need of their household.

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

The average monthly broadband cost is €45

Base: All have standalone broadband 326



Dubliners claim to have the highest broadband cost.

Q.30a How much do you pay per month for your broadband?

Monthly broadband cost x BB provider/Bundle/BB Used

Base: All have standalone broadband 326

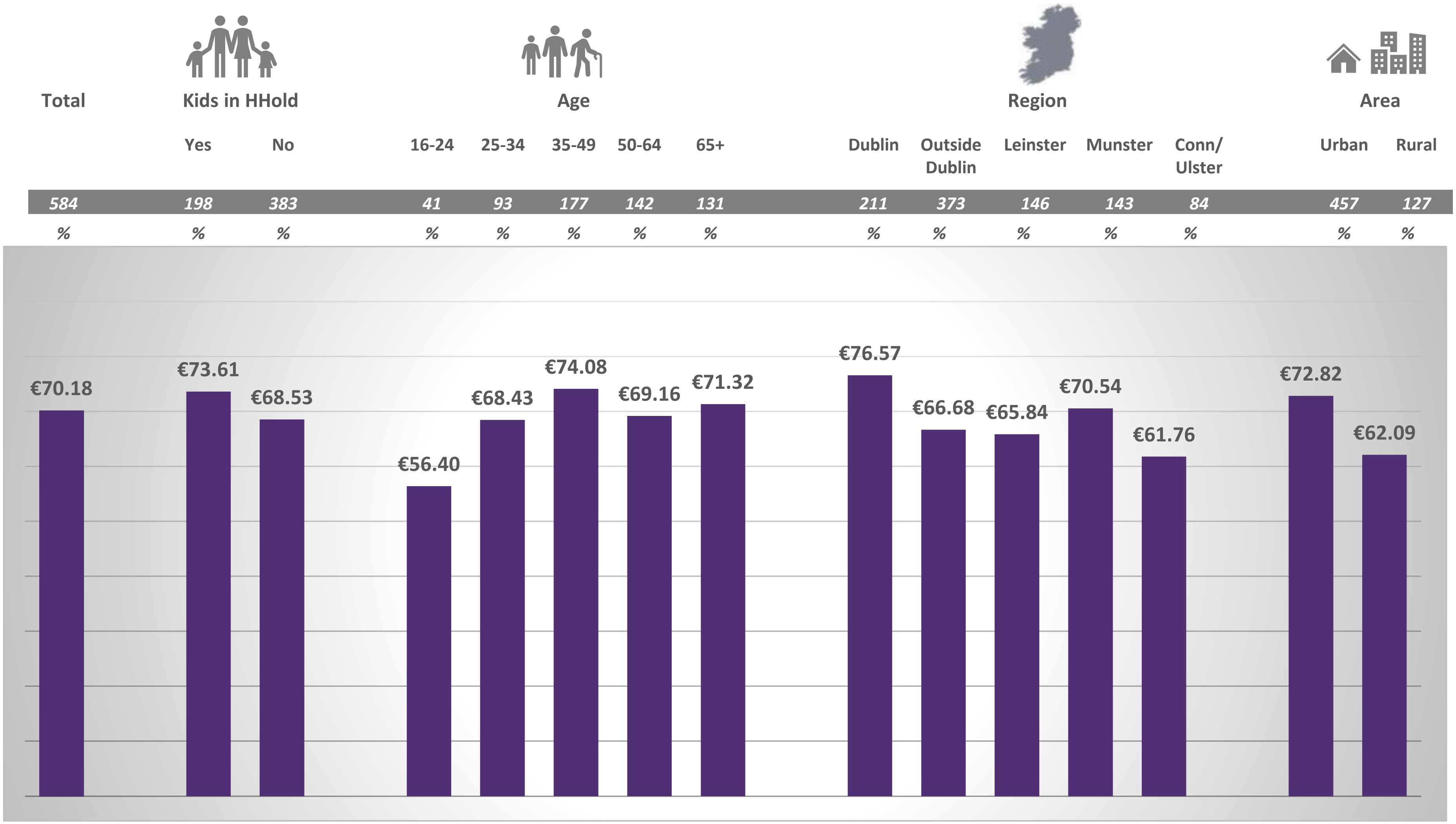
	Bundle		Broadband Used				
Total	Yes	No	BB via trad home/ landline	BB via cable TV network	BB over Fibre network	MBB by mobile network provider	Fixed wireless BB
326	*-*	*326*	*92*	*46*	*103*	*38*	*36*
%	*%*	*%*	*%*	*%*	*%*	*%*	*%*

Cable broadband customers claim to have the highest broadband cost.

Q.30a How much do you pay per month for your broadband?

The average monthly bundle cost (which includes your home broadband) is €70

Base: All have bundled broadband 584



Q.30b How much do you pay per month for your bundle (which includes your home broadband)?

Monthly broadband cost x BB provider/Bundle/BB Used

Base: All have bundled broadband 584

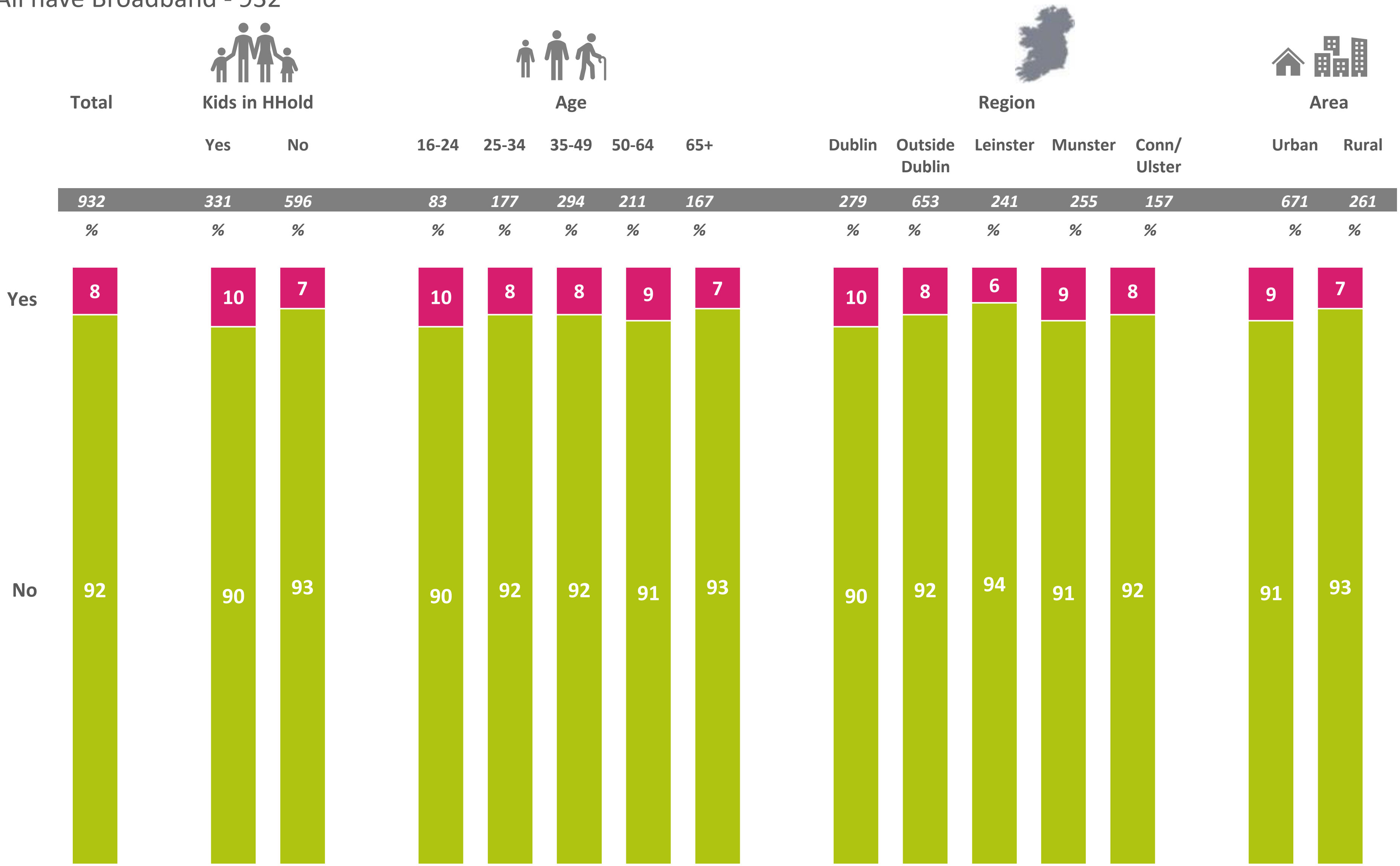
	Bundle		Broadband Used				
Total	Yes	No	BB via trad home/ landline	BB via cable TV network	BB over Fibre network	MBB by mobile network provider	Fixed wireless BB
584	*584*	*-*	*201*	*158*	*202*	*7*	*8*
%	*%*	*%*	*%*	*%*	*%*	*%*	*%*

Cable broadband customers claim to have the highest broadband bundle cost.

Q.30b How much do you pay per month for your bundle (which includes your home broadband)?

Less than 1 in 10 have experienced difficultly in past year paying for their broadband service

Base: All have Broadband - 932



Q.31 Have you experienced difficulty paying for your broadband service in the past year?

Experienced difficultly in past year paying your broadband service x BB provider/Bundle/BB Used

Base: All have Broadband - 932

Q.31 Have you experienced difficulty paying for your broadband service in the past year?

1 in 4 would be willing to spend more on broadband service to get a better service

Base: All with home broadband 932

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

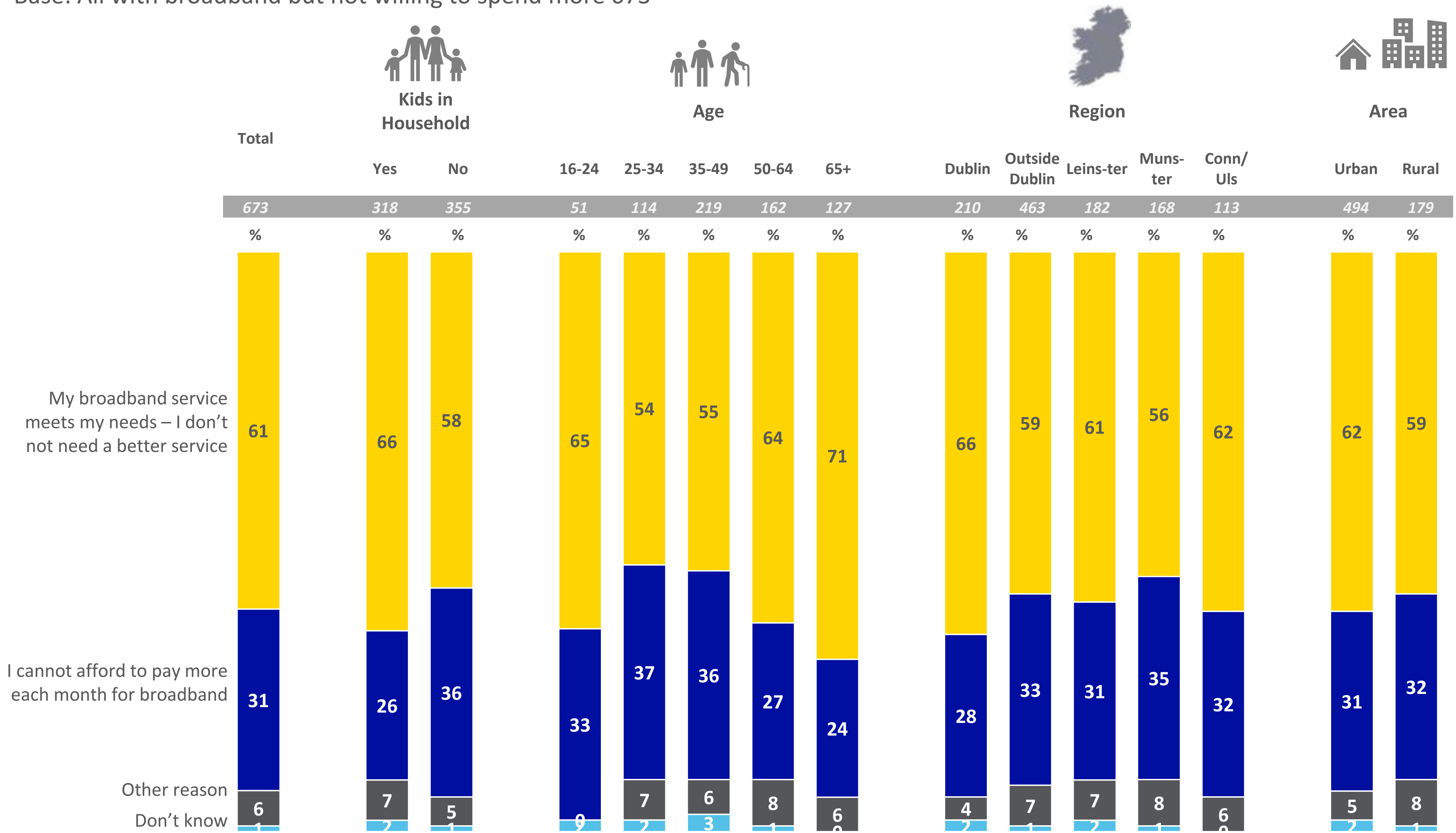
Willingness to spend more on broadband service to get a better service x BB provider/Bundle/BB Used

Base: All with home broadband 932

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

Broadband meeting needs is the main reason for not willing to spend more on a better Broadband service

Base: All with broadband but not willing to spend more 673



Q.33 What is the main reason why you would not spend more each month on broadband to get a better service?

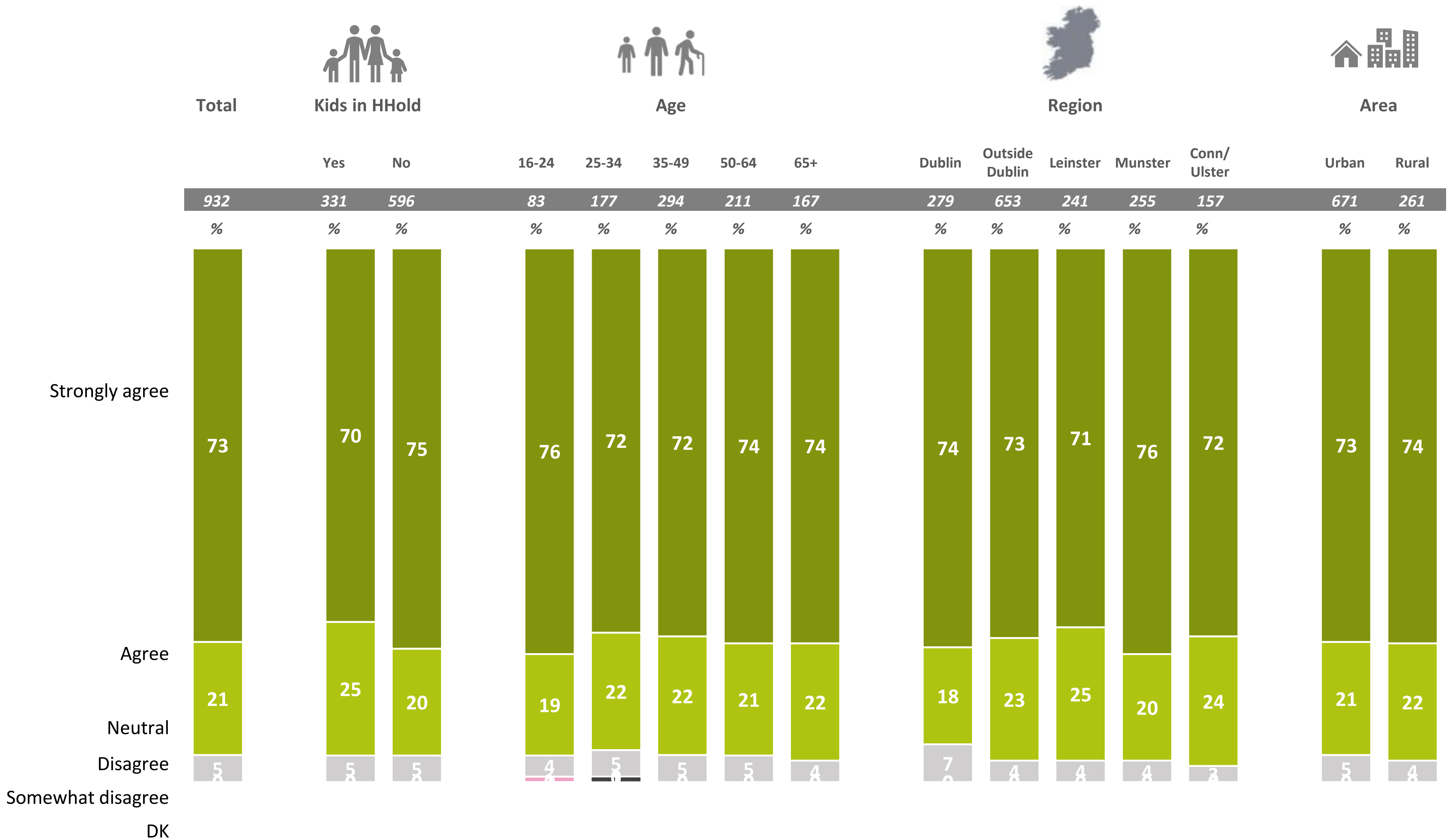
Main reasons for not willing to spend more on a better Broadband service x BB provider/Bundle/BB Used

Base: All with broadband but not willing to spend more to get a better service 673

Q.33 What is the main reason why you would not spend more each month on broadband to get a better service?

All broadband users value being able to access and use broadband'

Base: All have Broadband - 932



Q.34 How strongly do you agree or disagree with the following statement: "I value being able to access and use broadband"?

Agreement that ‘I value being able to access and use broadband’ x BB provider/Bundle/BB Used

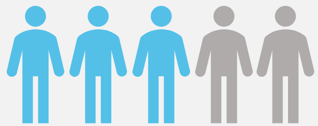
Base: All have Broadband - 932

Q.34 How strongly do you agree or disagree with the following statement: “I value being able to access and use broadband”?

Executive summary

Executive Summary

Impact of Covid-19 on broadband usage



3 in 5 have seen an increase in their home broadband usage since March 1st

- Those with kids in the household and the 25-34 age group are most likely to claim there has been an increase in their household broadband usage since March 1st 2020
- General browsing of the internet has seen the biggest increase in activity since March 1st, followed by reading of online news and video calling friends and family.

Working from home revolution

2 in 3 of all workers are now working from home to some degree

- Prior to March 1st more than 3 in 5 were working, since March first this has dropped to 44%.
- 2 in 3 of all those still working are now working from home to some degree, with the 25-34 age group and those based in Dublin most likely.
- Reflective of the working demographic this is also higher among those with cable and MBB networks.

Adequateness of broadband for working from home

3 in 4 agree that their broadband is adequate for working from home and 4 in 5 feel it meets the needs of their household.

- 3 in 4 agree that their home broadband is adequate for working from home and 4 in 5 feel it meets the needs of their household.
- Agreement is highest in Dublin and among those with cable and fibre networks.
- 1 in 4 would be willing to spend more on broadband service to get a better service, with all broadband users valuing being able to access and use broadband.

Thank you.

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