ComReg:
Market Analysis – Business Market

August 2017

Commission for Communications Regulation

REDC

Background and Objectives

- In 2016 the Commission for Communications Regulation (ComReg) consulted on its Market Analysis of the wholesale broadband markets in Ireland (Wholesale Local Access ‘WLA’ and Wholesale Central Access ‘WCA’) and ComReg subsequently required up to date market research in advance of finalising its Response to Consultation and Decision.
- The purpose of this market research, undertaken in 2017, is to update the key findings from the previous WLA/WCA market research study-undertaken by Red C in 2014. The findings from the 2014 market research are published in ComReg’s 2016 Consultation (ComReg Document Number 16/96).
- Specifically the research examines access to broadband and leased lines, and seeks to determine the impact different access modes have on Irish businesses.

Methodology

/ 301 interviews were conducted by telephone among a nationally representative sample of SME businesses operating in Ireland with a broadband or leased line connection.

/ Interviews were quota controlled by industry sector/company size and region in order to accurately represent the correct profile of Irish business.

/ In order to improve the reliability of sample within company size, we over-indexed interviews among larger companies but subsequently weighted the sample back to the know profile of company size in Ireland.

Company Size	Number of Interviews Conducted	Weighted Representative Sample
Micro (1-10 Employees)	190	249
Small (11-50 Employees)	82	42
Medium (50-250 Employees)	29	7
Total	301	298

/ As with the 2014 research, all interviews were conducted via CATI telephone interviewing

/ Fieldwork was conducted during April and May 2017.

/ Interviews were conducted with the person responsible for telecommunication decision making within each company. In larger companies this was likely to be a specialised person such as an IT manager and for smaller companies this person was likely to be the owner/manager.

/ Throughout this report, comparison data from the 2014 survey is shown where relevant.

Note on Sample Size

- Some access modes are not commonly used and therefore have very small base sizes. Given the size of the overall sample some access modes were too small to analyse the data. Below is a list of the sample sizes achieved for each primary access type in the survey.

Access Type Primary Broadband Mode	Unweighted Base Size*
Fixed broadband via a traditional fixed telephone line (landline)	148
Fibre Network	78
Cable Network	20
Satellite Broadband	16
Fixed Wireless	16
Any Leased Line	10
Other Broadband	12

- On filtered questions the base size described above will fall further and analysis within each access type will not always be possible.
- All base sizes shown throughout the presentation are unweighted as this represents the true number of interviews conducted.

*Unweighted base size is the number of actual interviews conducted

Presentation Structure

- **Sample Profile**
- **Connection details**
- **Suppliers and Usage**
- **Speed of Connection**
- **Contracts**
- **Bundling**
- **Switching**
- **SSNIP**

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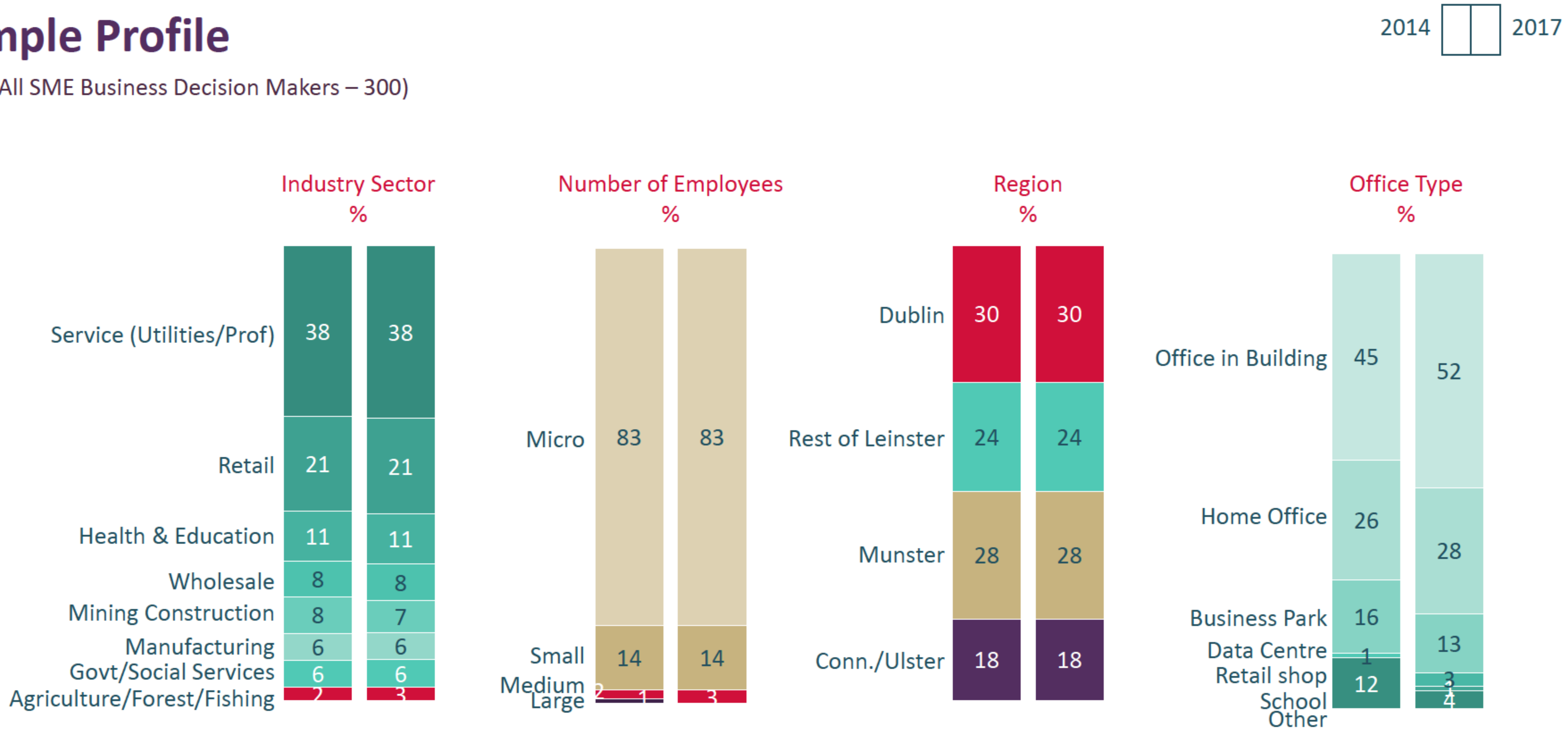
Sample Profile

Sample Profile

(Base: All SME Business Decision Makers – 300)



Note: Employee numbers for Micro=1-10; Small=11-50; Medium=15-249; Large=250+

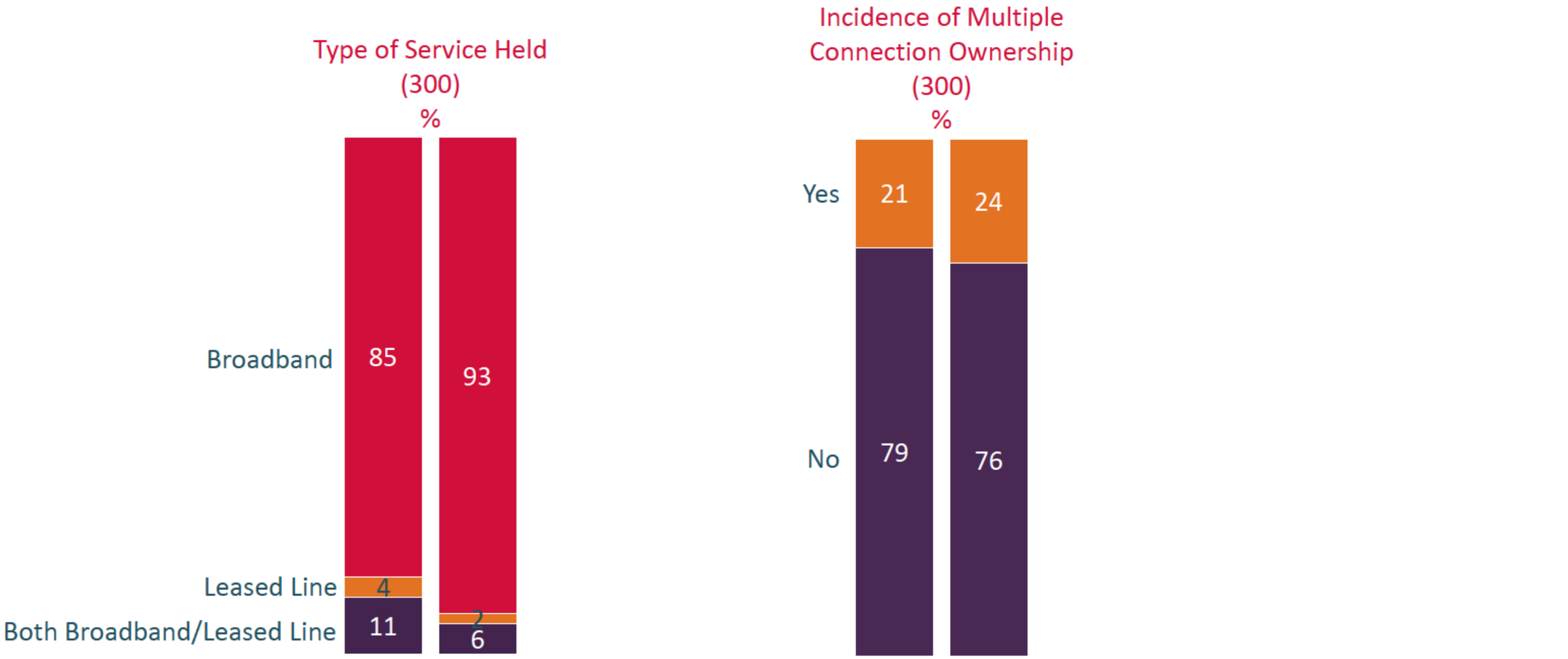
The surveyed sample was weighted to represent the total business SME market in Ireland by industry sector, size and region.

Connection Details

Connection Details – Top Level Overview

(Base: All SME Business Decision Makers - 300)

Q.1 What data connectivity services does your company have?



93% of surveyed SME'S had a broadband only connection.

Access Type by Company Size (Multiple Responses)

(Base: All Respondents Who Use Data Connectivity Services, N= 300)

Q2. In your business, which of the following means of accessing services are used?

	Total (n=300)	Total 2014 (n=980)	No. of Employees 2017: 1-10 (191) %	11-50 (82) %	51-249 (27*) %
Fixed broadband via a traditional fixed telephone line (landline)	56%	(64%)	57%	50%	44%
Fixed broadband provided by a Fibre network	28%	(15%)	26%	35%	48%
3G/4G Mobile Broadband (dongle Mi-Fi devices, sim card in Tablets))	15%	(12%)	15%	15%	27%
Fixed broadband via a cable TV network	12%	(7%)	11%	15%	15%
Internet access over Mobile Phone using 3G/4G data package (non Wi-Fi)	8%	(7%)	7%	11%	18%
Broadband provided by Satellite	7%	(4%)	7%	7%	13%
Fixed wireless connection, provided via a modem that receives radio signals through the air	5%	(3%)	6%	3%	3%
Any Leased Line	7%	(15%)	7%	7%	22%

* Caution: Small Base Size

56% of surveyed SME's connect to broadband via a traditional phone line down from 2014 (64%). According to the survey Fibre access has increased to 28% of all access types up from 15% in 2014.

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Access Type Most Often Used (Single Code)

(Base: All Respondents Who Use Data Connectivity Services, N= 300)

Q.2/4 Which service do you consider to be your primary/main access mode?

	Total (n=300)	Total 2014 (n=980)	No. of Employees 2017: 1-10 (191) %	11-50 (82) %	51-249 (27*) %
Fixed broadband via a traditional fixed telephone line (landline)	50%	(58%)	52%	43%	38%
Fixed broadband provided by a Fibre network	23%	(13%)	21%	34%	31%
Fixed broadband via a cable TV network	10%	(6%)	10%	14%	4%
3G/4G Mobile Broadband (dongle Mi-Fi devices, sim card in Tablets))	5%	(3%)	5%	2%	13%
Broadband provided by Satellite	5%	(3%)	5%	4%	3%
Fixed wireless connection, provided via a modem	2%	(6%)	2%	1%	0
Internet access over Mobile Phone using 3G/4G data package (non Wi-Fi)	1%	(1%)	2%	0	0
Any Leased Line	3%	(9%)	3%	3%	12%

* Caution: Small Base Size

According to the survey 50% of Irish businesses rely on broadband access via a traditional phone line as the most often means of access.

Access Type Most Often Used (Single Code)

(Base: All Respondents Who Use Data Connectivity Services, N= 300)

Q.2/4 Which service do you consider to be your primary/main access mode?

	Total (n=300)	Total 2014 (n=980)	BY Region 2017: Dublin (70) %	ROL (79) %	Munster (92) %	Conn/Ulster (59) %
Fixed broadband via a traditional fixed telephone line (landline)	50%	(58%)	40%	56%	51%	60%
Fixed broadband provided by a Fibre network	23%	(13%)	21%	22%	29%	19%
Fixed broadband via a cable TV network	10%	(6%)	33%	1%	0	0
Broadband provided by Satellite	5%	(3%)	0	10%	6%	5%
Fixed wireless connection, provided via a modem	5%	(3%)	2%	7%	3%	9%
3G/4G Mobile Broadband (dongle Mi-Fi devices, sim card in Tablets))	2%	(6%)	0	1%	4%	2%
Internet access over Mobile Phone using 3G/4G data package (non Wi-Fi)	1%	(1%)	0	2%	2%	2%
Any Leased Line	3%	(9%)	3%	1%	5%	3%

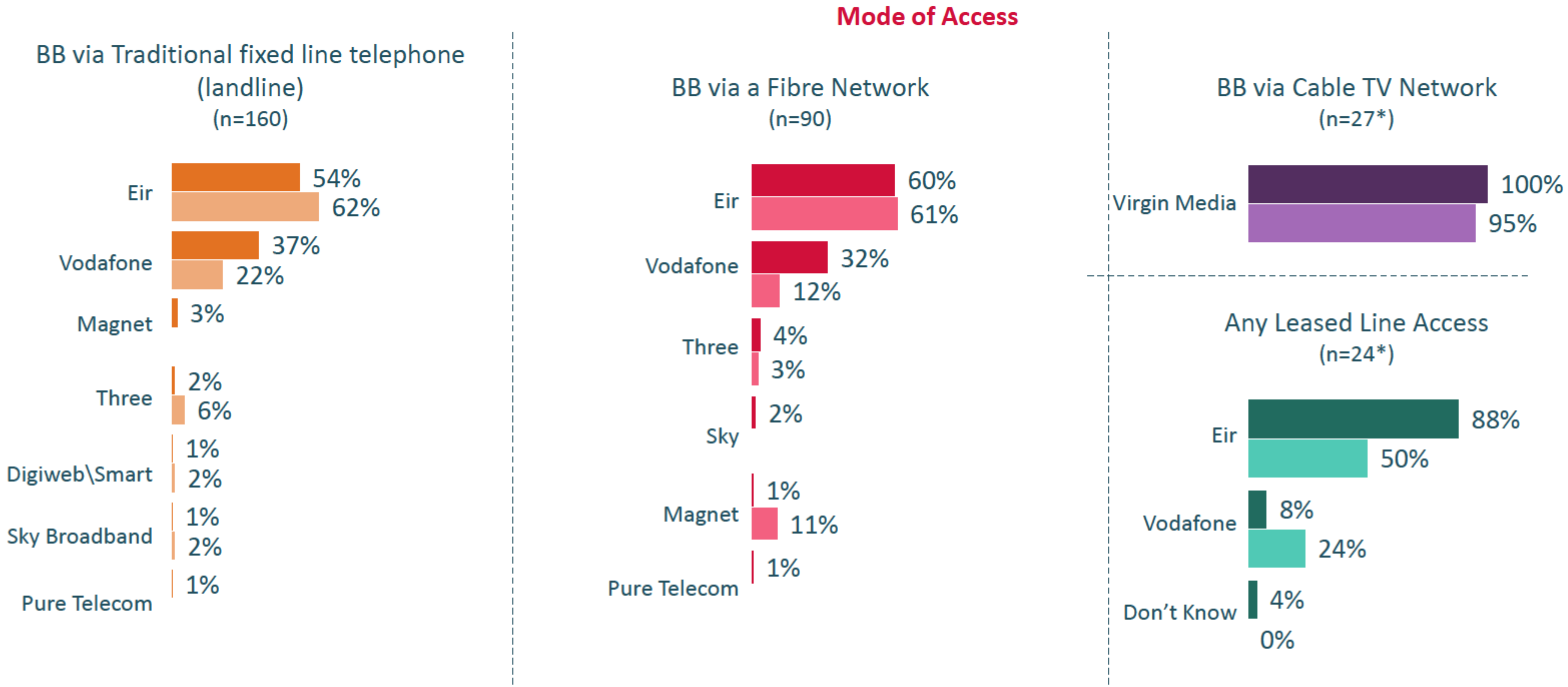
50% of SME's businesses in this survey use fixed broadband via a traditional fixed telephone line (or via a landline) higher in Conn/Ulster (60%) versus Dublin 40%. Instances of Fixed broadband provided by a Fibre network and Fixed broadband via a cable TV network have increased vs. 2014.

Supplier and Usage

Current Broadband/Leased Line Provider Share

(Base: All Broadband/Leased Line users, n = 300)

Q.7 What company does your business currently use as your service provider (For each access type)?



* Caution: Small Base Size

Eir has 54% share of broadband users using a traditional fixed line telephone and 60% share of broadband of fibre broadband users. Virgin Media has 100% share of cable broadband users surveyed.

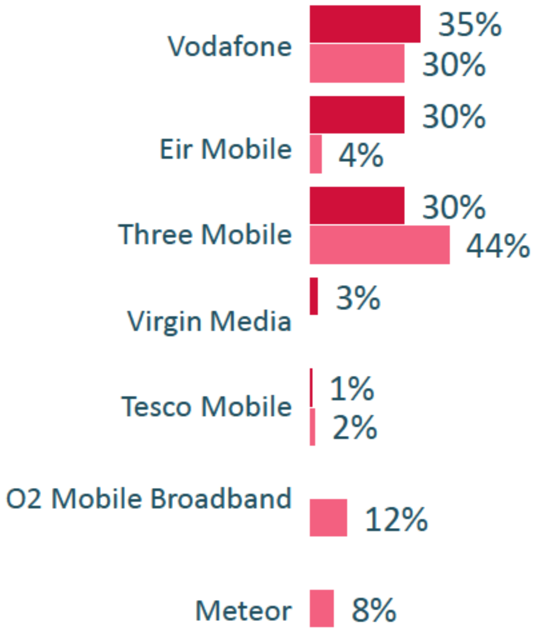
Current Broadband/Leased Line Provider Share

(Base: All Broadband/Leased Line users, n = 300)

Q.7 What company does your business currently use as your service provider (For each access type)?

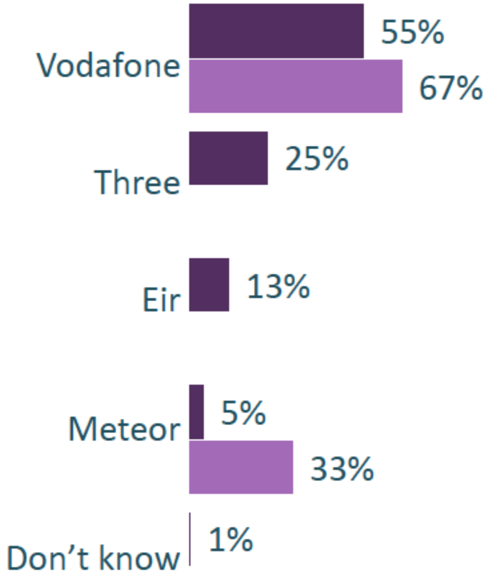
Mode of Access

BB via 3G/4G Mobile Phone
(n=46*)



BB via a Fixed Wireless Connection
(n=8*)

Internet access via Mobile Broadband
(n=26*)



* Caution: Small Base Size

Vofafone has 35% share of mobile phone business broadband users, while Eir (including Meteor) has 38% and Three have 30%. Over half (55%) of those accessing the internet via mobile broadband are with Vodafone.

Use of Primary Service – Broadband/Leased Line Primary Access Users

(Base: All respondents who use broadband as primary data connectivity services, n= 300)

Q.8 What does your business use your broadband for?

	Any Broadband/Leased Line Primary Access (n=300)	2014 (n=1,003)	Fixed BB (Landline) (n=148)	BB Fibre Network (n=78)	BB Cable Network (n=20*)	BB Satellite (n=16*)	Fixed Wireless (n=16*)	Any Leased Line (n=10*)	Other (n=12*)
Email and internet	98%	(96%)	100%	93%	100%	98%	100%	80%	100%
Data services such as cloud computing and other software services	29%	(27%)	26%	38%	35%	5%	20%	39%	21%
Connectivity between business premises	20%	(22%)	16%	26%	34%	3%	24%	22%	16%
Employee remote access to the business network	16%	(21%)	15%	20%	29%	0	0	34%	5%
Disaster recovery services	16%	(13%)	13%	15%	34%	9%	0	50%	11%
Voice - VoIP\ Voice over broadband	11%	(12%)	8%	14%	27%	0	0	8%	11%
Card Machines		(1%)	-	-	-	-	-	-	-
Other	3%	(3%)	2%	4%	0	6%	0	20%	0

* Caution: Small Base Size

98% of companies using broadband as a primary means of data connectivity stated that they use broadband for email and internet. The next highest category of usage (29%) was for data services, such as cloud computing and other software services.

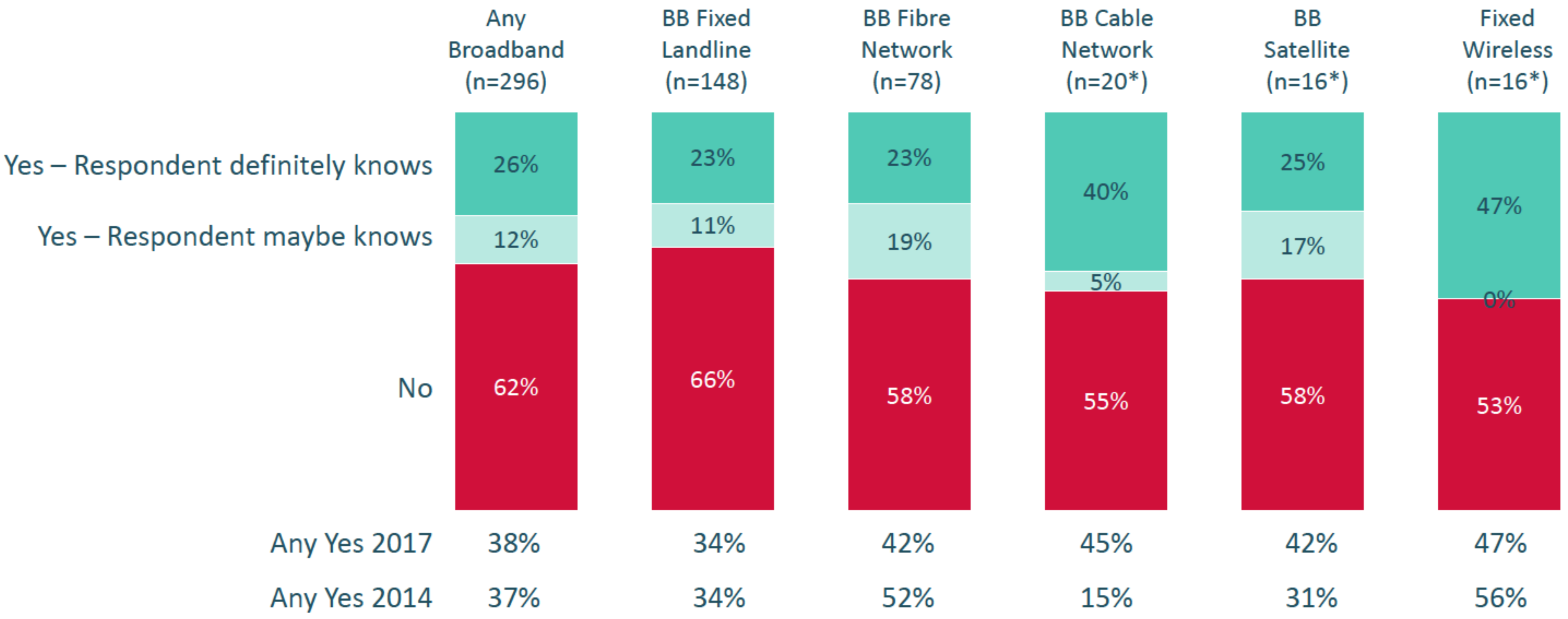
Speed of Connections (Broadband)

Knowledge of Claimed Maximum Download Speed

(Base: All respondents who use broadband as primary data connectivity services, n= 296)

Q.39 Do you know the maximum claimed download speed for your organisation's main broadband service?

Primary Mode of Access



* Caution: Small Base Size

A lack of awareness exists in terms of knowledge of maximum download speeds; only 26% of all Broadband users surveyed are aware of this.

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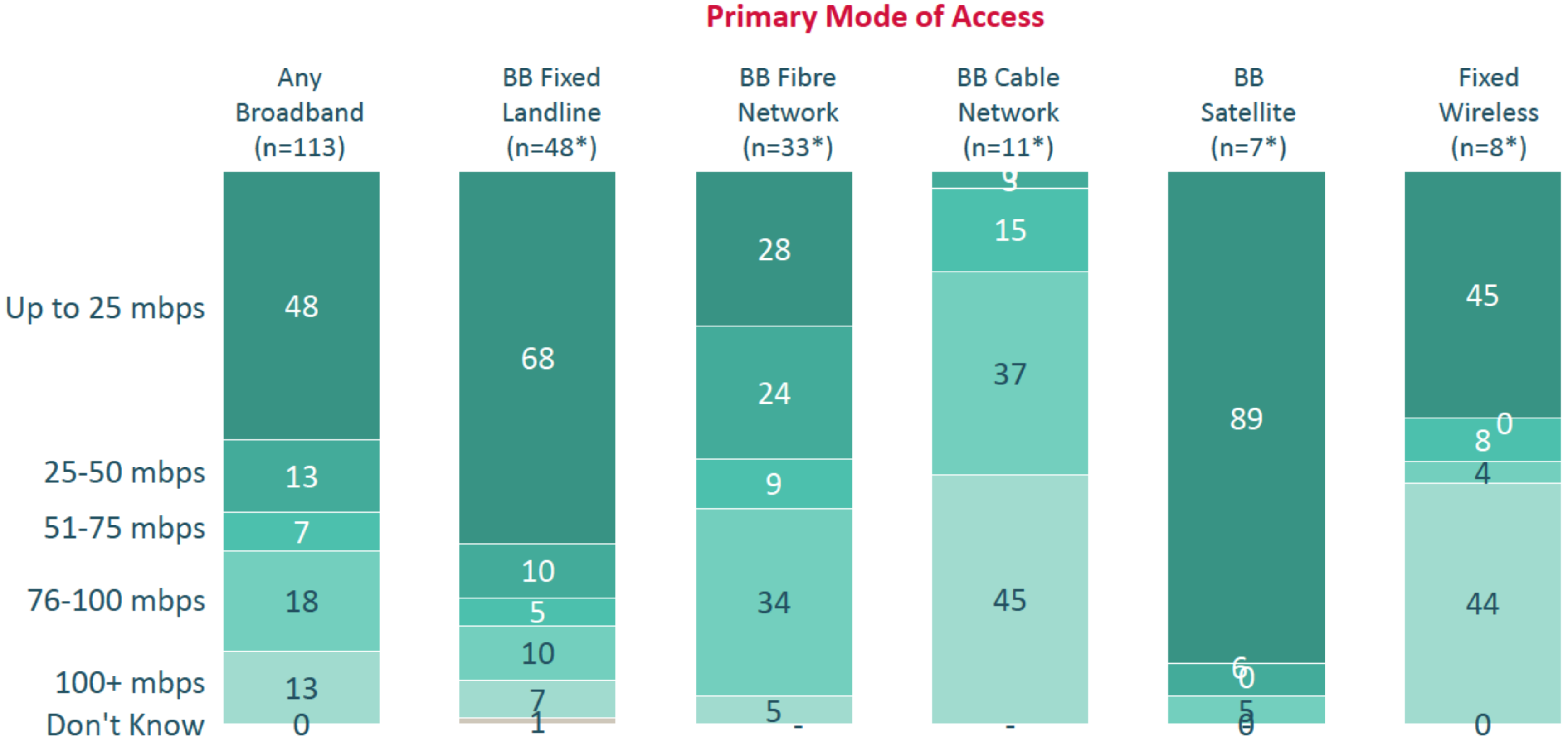
What is Maximum Claimed Download Speed?

(Base: Total Broadband/Leased Line users Who Know Download Speed, n=113)

Q40. What is the maximum claimed download speed for your main broadband service – up to how many Mega Bits per second?



	Any Broadband	BB Fixed Landline	BB Fibre Network	BB Cable Network	BB Satellite	Fixed Wireless
2017 Average	**47Mbps**	**34Mbps**	**35Mbps**	**57Mbps**	**22Mbps**	**35Mbps**
2014 Average	**36Mbps**	**22Mbps**	**51Mbps**	**115Mbps**	**10Mbps**	**21Mbps**

* Caution: Small Base Size

48% of SMEs that know their download speed claim to receive speeds of up to 25 mbps, while 13% say that they receive speeds of 100+ mbps.

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Bundles

Incidence of Bundling Broadband/Leased Line

(Base: Total Broadband/Leased Line users, n = 300)

Q.9 Which of the following best describes how your business is billed for your broadband and fixed line phone and mobile phone which you may also have?

	Any Broadband/Leased Line (n=300)	Any Broadband/ Leased Line 2014 (n=887)	Primary Mode of Access						
			BB Fixed (Landline) (n=148)	BB Fibre Network (n=78)	BB Cable Network (n=20)	BB Satellite (n=16*)	Fixed Wireless (n=16*)	Any Leased Line (n=10*)	Other (n=12*)
I receive a single bill for my broadband service that includes at least one of the other services I have	65%	(63%)	78%	67%	47%	20%	21%	74%	52%
I receive a separate bill for my broadband service but I use the same provider for at least one of the other services	9%	(10%)	8%	12%	15%	0	0	18%	16%
I receive a separate bill for my broadband service as I receive all other services from different providers	22%	(21%)	11%	17%	36%	75%	77%	8%	32%
I only have broadband. I do not have other communications services from any other provider (e.g. fixed phone, mobile phone)		(4%)	-	-	-	-	-	-	-
Don't know	3%	(2%)	3%	4%	2%	5%	2%	0	0

*Caution Small Base

65% of SME's surveyed stated that they receive a single bill for a broadband service that includes at least one other service.

Services included Within Bundle

(Base: Total Broadband/Leased Line Users Who Use Service In A Bundle, n = 182)

Q.10 Including your broadband services which of the following services are also included on your single bill?

Primary Mode of Access

	Total (n=182)	Total 2014 (n=560)	BB Fixed Landline (n=110)	BB Fibre Network (n=52)
Fixed phone	69%	(78%)	74%	80%
Fixed phone & Mobile phone	15%	(18%)	19%	11%
Mobile phone	7%	(2%)	2%	4%
Other	7%	(2%)	5%	3%
Don't know	1%	(1%)	1%	1%

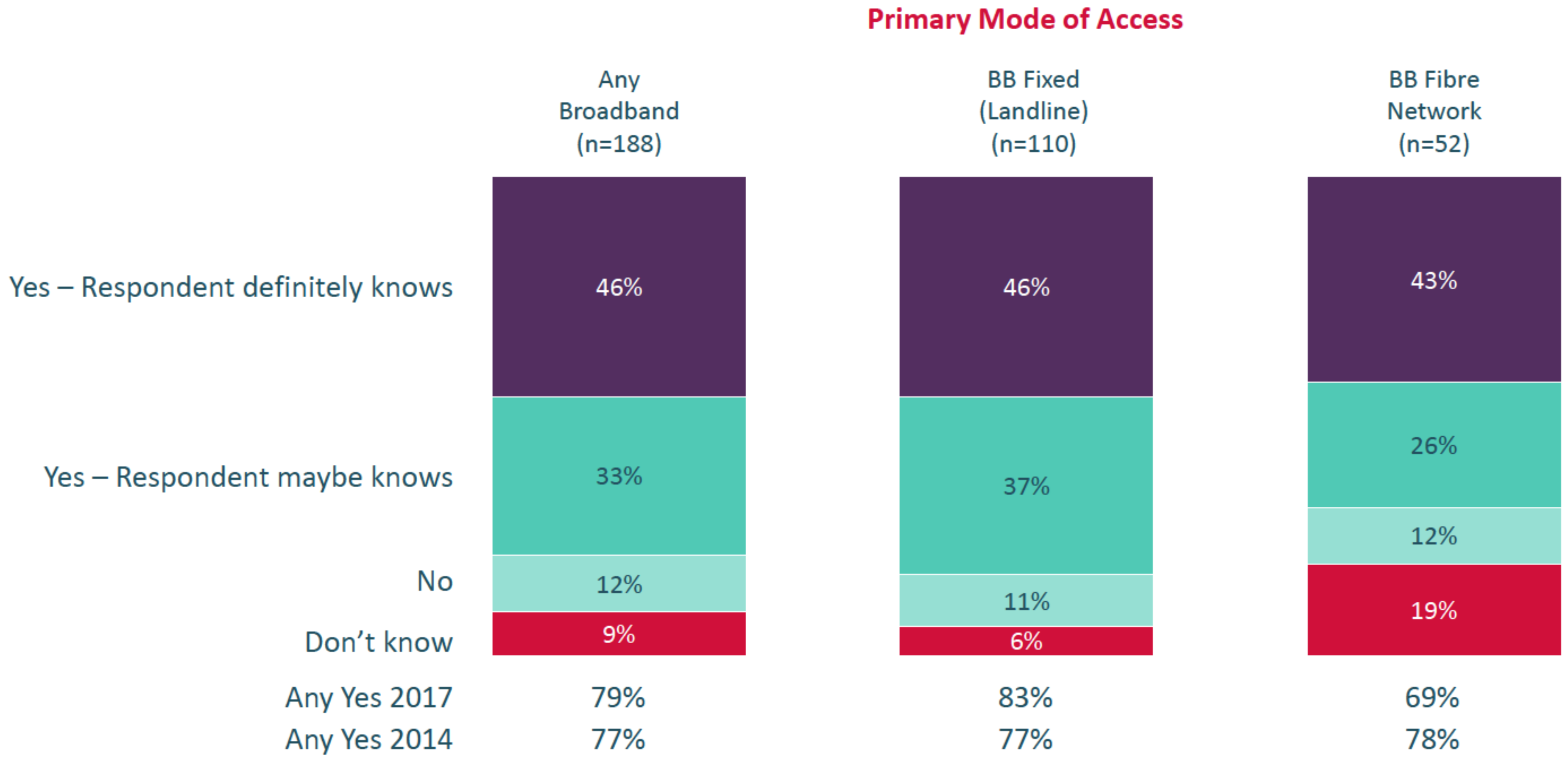
Other Bundle types base too small to show

69% of SME business users in the survey with a bundle have a broadband and fixed phone bundle.

Awareness of Cost of Services – Bundle Users

(Base: Total Broadband/Leased Line Users Who Use Service In A Bundle Which They Know What Is Included, n = 188)

Q.11 Do you know how much your business pays for your combined service on a monthly basis?



Other Bundle types base too small to show

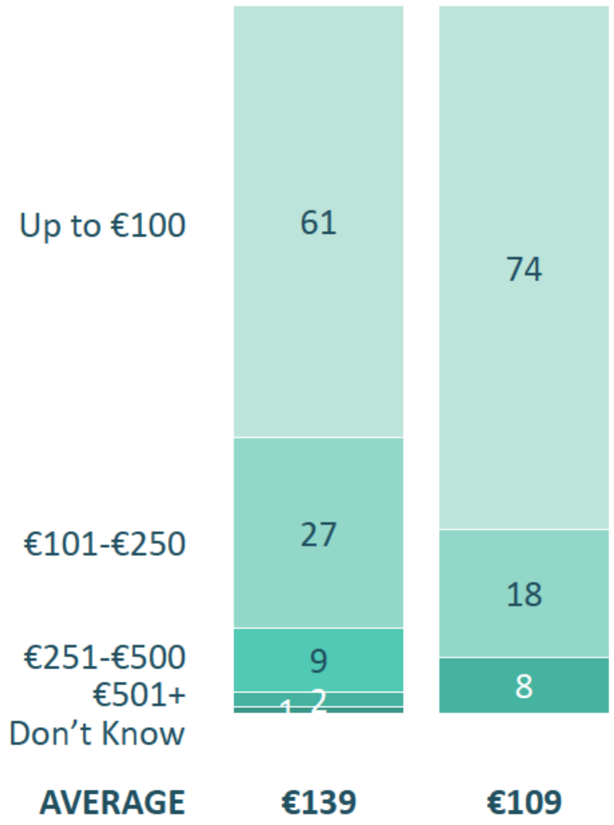
46% of surveyed SME's with a broadband bundle claim to definitely know the cost of the bundle service.

Typical Spend Per Month - Bundle Users

2014 2017

Q.12 How much does your business typically pay for this combined package .... of services per month (excluding any promotional/introductory offers)?

Cost – Broadband and Fixed Phone Bundle
(n=110)
%



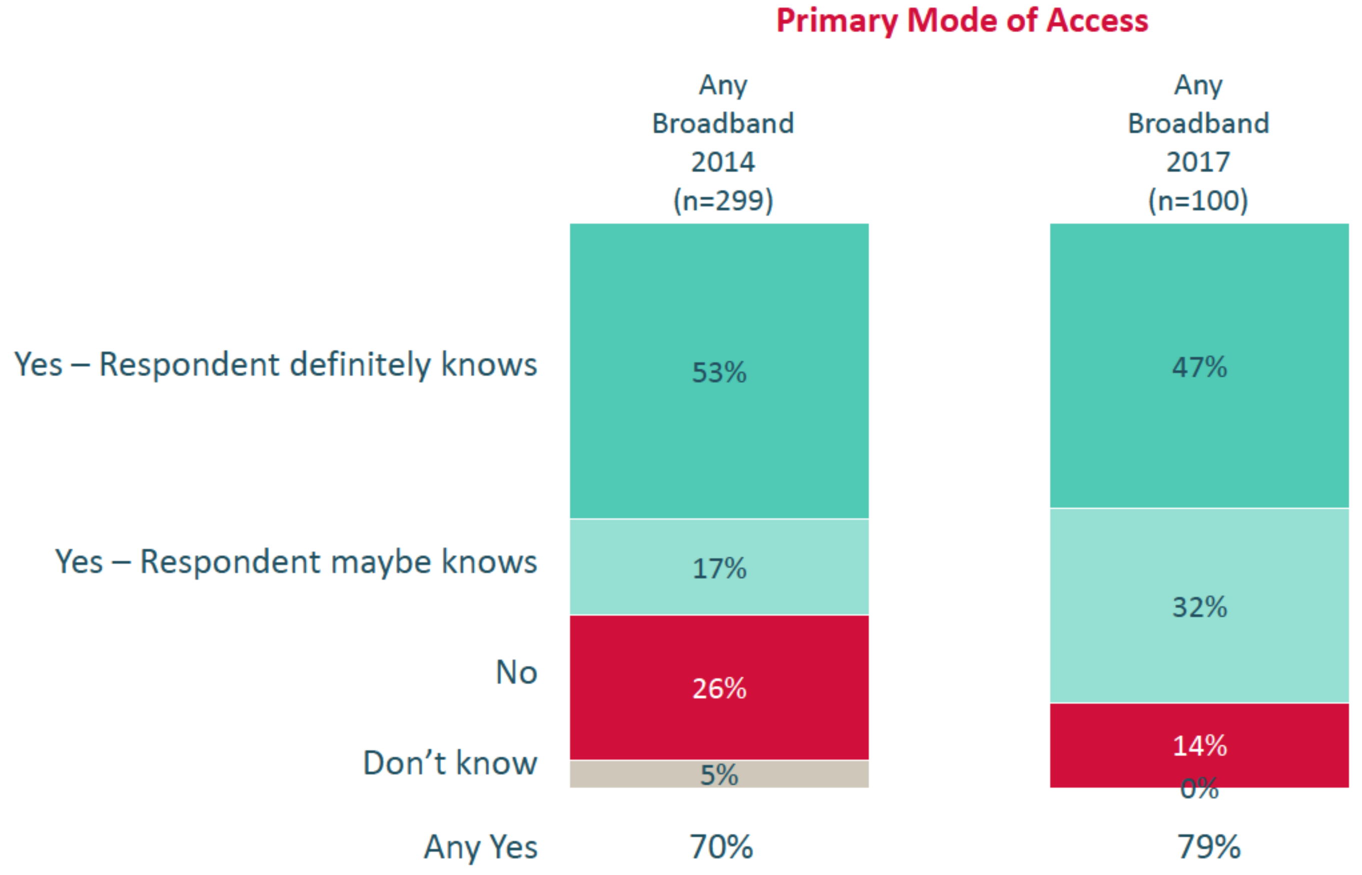
NOTE: Other Bundle types base too small to show

On average, within this survey, those with Broadband and Fixed Phone bundle pay €109 per month for their package, falling in cost vs. 2014.

Awareness of Cost of Services – Non Bundle Users

(Base: Total Broadband/Leased Line users Who Use Service Not In A Bundle n = 100)

Q.14 Do you know how much your business pays for your broadband service on a monthly basis?



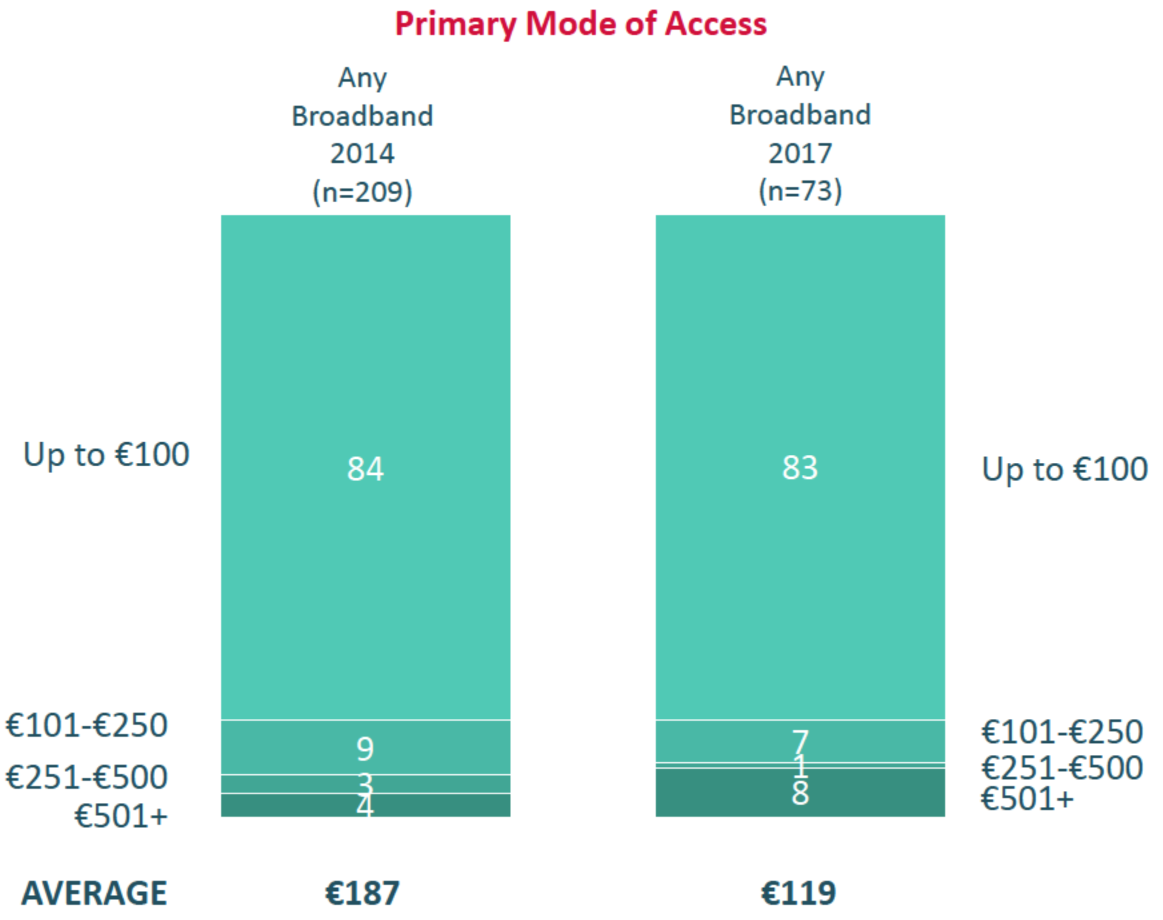
Other Access types too small to show

Of the SME business surveyed without a bundle 47% claim to know the cost of their broadband service, down by 6% over 2014.

Typical Broadband Spend Per Month – Non Bundle Users

(Base: Total Broadband/Leased Line users Who Use Service Not In A Bundle And Know Cost, n=73)

Q15. How much does your business typically pay for its broadband service per month (excluding any promotional/introductory offers)?



Note: Other Access types too small to show

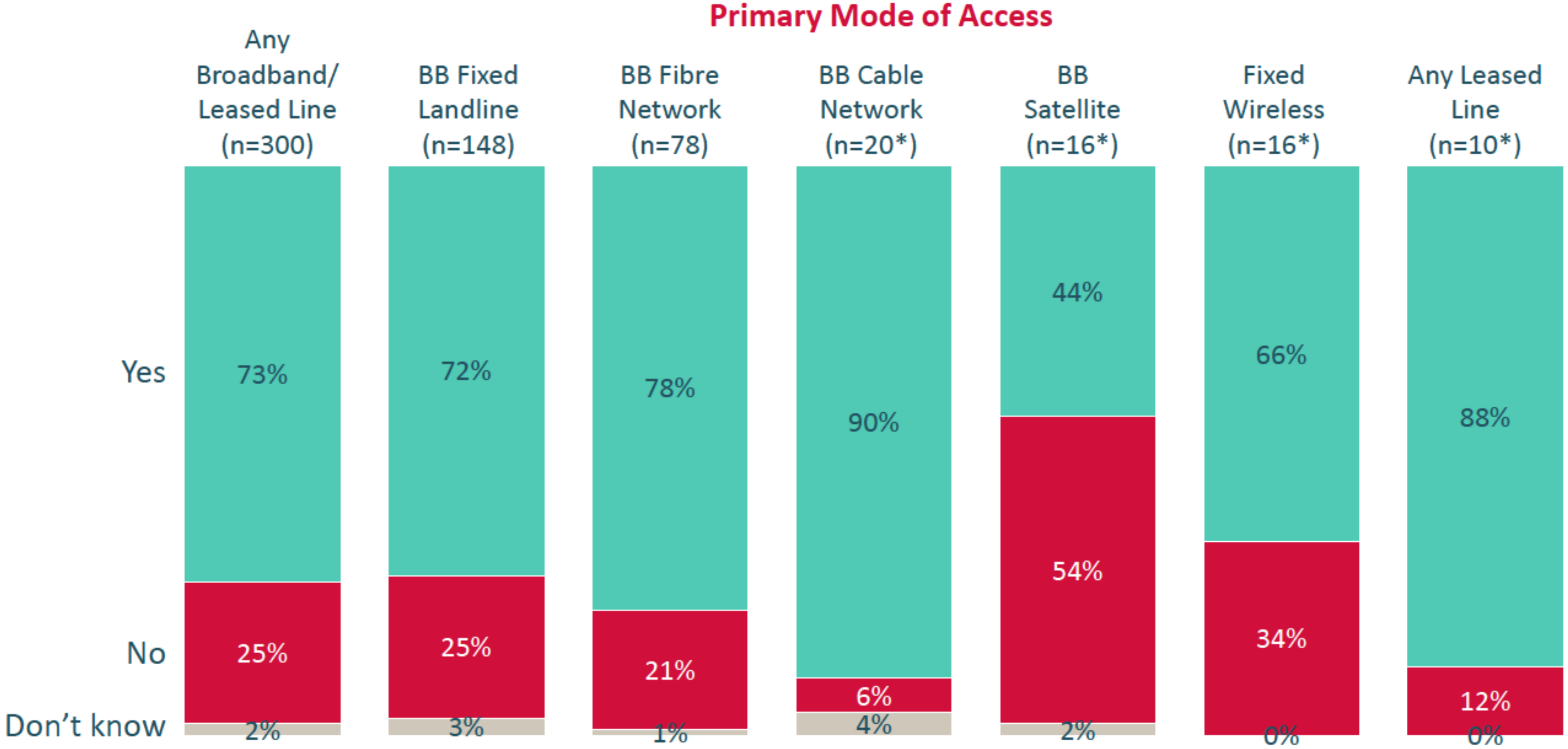
On average, SMEs within this survey are paying €119 per month for their broadband service.

Contracts, Loyalty And Ability To Negotiate

Is Primary Service in Contract?

(Base: Total Broadband/leased Line Users, n = 300)

Q16. Thinking about your primary broadband/leased line service, are you currently tied into a contract with your service provider?



	Any Broadband/ Leased Line	BB Fixed Landline	BB Fibre Network	BB Cable Network	BB Satellite	Fixed Wireless	Any Leased Line
Any yes 2017	**73%**	**72%**	**78%**	**90%**	**44%**	**66%**	**88%**
Any yes 2014	**64%**	**65%**	**65%**	**59%**	**33%**	**42%**	**72%**

* Caution: Small Base Size

73% of SME's surveyed are in contract with their service provider

Length of Time with Current Provider

(Base: Total Broadband/Leased Line users, n=300)

Q.17 How long has your business been with your current main broadband service provider for?

	Total Broadband/Leased Line (n=300)	Total Broadband/Leased Line 2014 (n=887)	Primary Mode of Access: BB Fixed Landline (n=148)	BB Fibre Network (n=78)	BB Cable Network (n=20)	BB Satellite (n=16)	Fixed Wireless (n=16)	Any Leased Line (n=10)	Other (n=12*)
Less than 6 Months	7%	(11%)	6%	10%	0	14%	4%	4%	14%
Between 6 and 12 Months	11%	(11%)	14%	13%	1%	0	12%	0	16%
Between 12 to 18 Months	6%	(9%)	7%	5%	7%	26%	0	0	0
Between 18 Months to 2 years	8%	(7%)	5%	8%	21%	15%	8%	0	0
Between 2-3 years	16%	(13%)	13%	18%	34%	2%	0	38%	8%
Greater than 3 years	51%	(49%)	54%	46%	36%	44%	76%	58%	61%
Don't know	1%	(2%)	1%	0	2%	0	0	0	0

*Caution Small Base

51% of SME's surveyed have been with their current provider for 3 years or more. In 2014 the comparative figure was 49%

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Switching

Incidence of Switching

(Base: Total Broadband/Leased Line Users, N= 300)

Q35. Has your organisation ever switched broadband or leased line service provider?

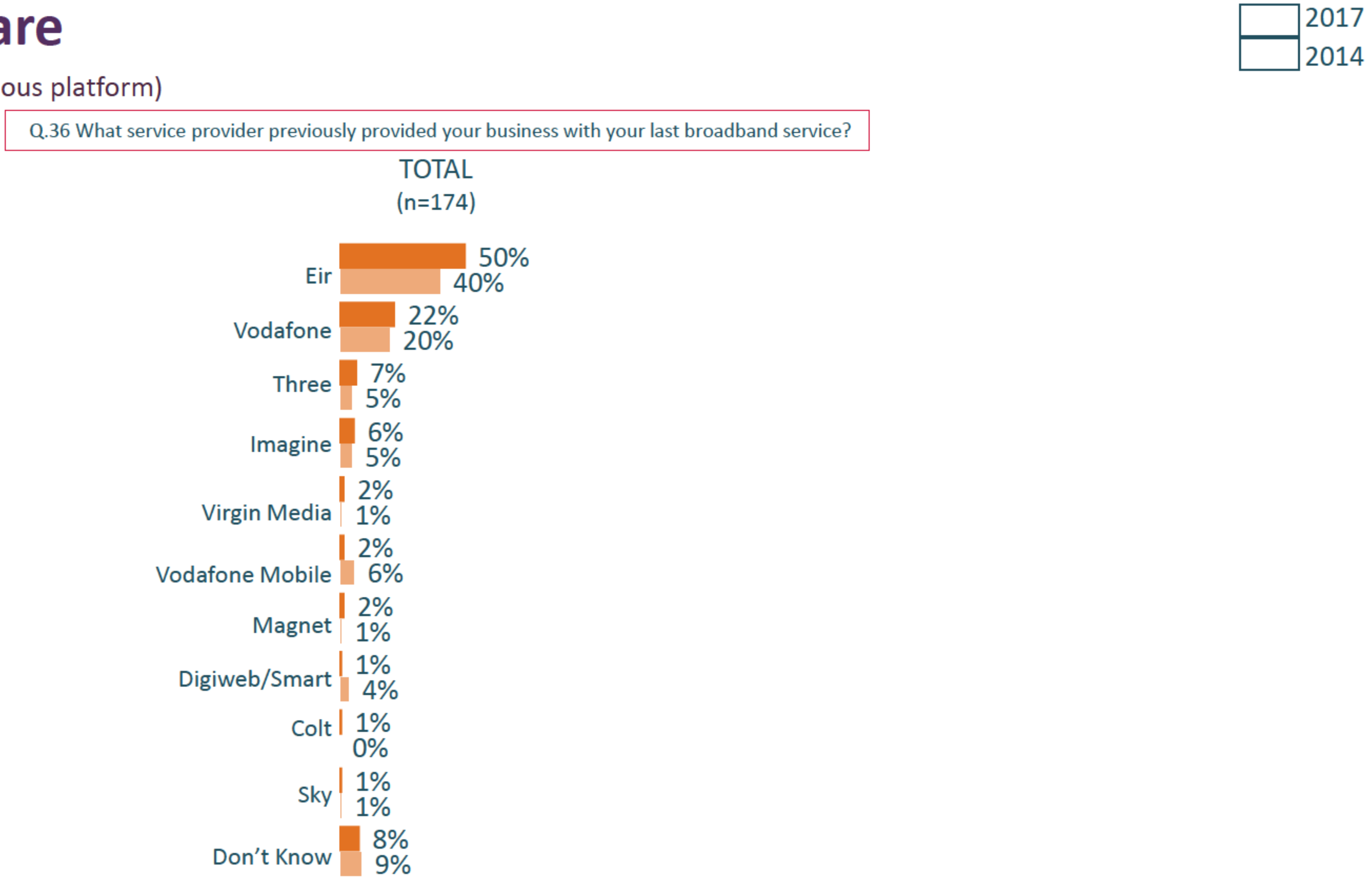
	Total Broadband/Leased Line (n=300)	Total Broadband/Leased Line 2014 (n=887)	Primary Mode of Access: BB Fixed Landline (n=148)	BB Fibre Network (n=78)	BB Cable Network (n=20*)	BB Satellite (n=16*)	Fixed Wireless (n=16*)	Any Leased Line (n=10*)	Other (n=12*)
Yes – In the last month	1%	(2%)	1%	1%	0	0	0	0	0
Yes – Between 1 month and 6 months ago	1%	(3%)	0	2%	0	3%	4%	0	0
Yes – Between 3 months and 6 months ago	5%	(3%)	3%	8%	0	8%	0	4%	14%
Yes – Between 6 months and 12 months ago	7%	(7%)	8%	5%	0	13%	12%	0	20%
Yes - Between 1 Year and 3 Years ago	22%	(21%)	23%	23%	37%	20%	0	9%	36%
Yes - More than 3 years ago	23%	(11%)	22%	27%	17%	12%	27%	20%	36%
Never switched	42%	(53%)	43%	34%	46%	43%	58%	68%	30%

*Caution Small Base

Among the SME's surveyed 58% stated that they have previously switched broadband/leased line provider. The comparative figure in 2014 was 47%

Previous Provider Share

(Base: All Broadband Switchers within previous platform)



*Caution Small Base
Other Access types base too small to show

Among those SMEs in the survey that have switched, 50% were previously with Eir.

Switchers - Previous Means of Access

(Base: Total Broadband/Leased Line users Who Have Switched Provider, n=182)

Q.37 Thinking about your previous broadband or leased line service provider which means of accessing the internet did you previously use?

Note: 59% of those switching from Fixed Broadband (Landline), are using the same access mode with their new provider

	Total Broadband/Leased Line Switchers (n=174)	Total Switchers 2014 (n=418)	Current Primary Mode of Access	
			BB Fixed Landline (n=91)	BB Fibre Network (n=51)
NET: Broadband	96%	(95%)	97%	97%
Fixed broadband (Landline)	76%	(80%)	91%	71%
Fixed broadband (Fibre)	6%	(3%)	2%	19%
Broadband provided by Satellite	4%	(4%)	0%	3%
Fixed BB (Wireless Connection)	4%	(0%)	1%	3%
3G\4G Mobile Broadband	3%	(7%)	1%	2%
Fixed broadband (Cable)	2%	(2%)	0%	0%
Internet access over Mobile Phone using 3G\4G data package (non Wi-Fi)	1%	(1%)	0%	0%
NET: Leased Line Options	1%	(8%)	0%	0%
Analogue leased lines	1%	(5%)	0%	0%
Don't know	2%	(2%)	3%	3%

76% of all SME surveyed who had switched had a fixed broadband (landline) service previously.

Switchers - Importance in Decision to Switch

(Base: Total Broadband/Leased Line Users Who Have Switched Provider – n=182)

Q.38 How important were these options in your decision to switch?

	Total Broadband/Leased Line (n=182)	Primary Mode of Access: BB Fixed Landline (n=91)	Primary Mode of Access: BB Fibre Network (n=51)
Cost – better price with new supplier	61%	72%	57%
Speed/download limits	18%	10%	20%
Poor/Unreliable Service	11%	9%	11%
Poor Broadband Signal/Coverage	5%	3%	7%
Slow To Solve/Fix Problems	5%	4%	8%
Bundling	4%	4%	7%
Poor Customer Service	3%	4%	3%
Moved business premises	2%	2%	0%
Contract	2%	1%	4%
To Get Fibre Broadband	2%	0	8%
Other	4%	4%	1%
Don't Know	1%	2%	0

Other Access types base too small to show

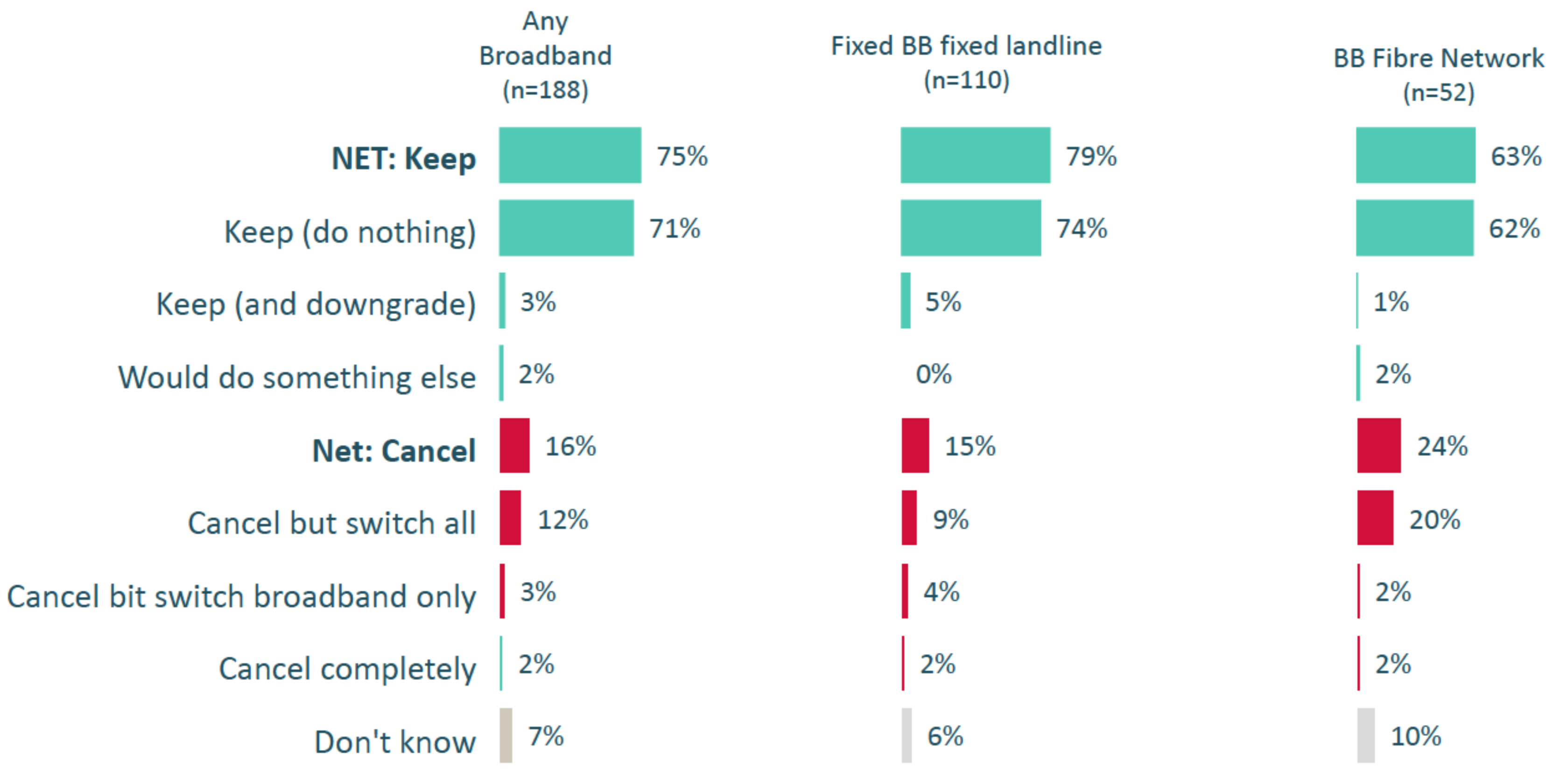
61% of SME's in the survey who switched broadband/leased line supplier did so as they received a better price with their new supplier.

SSNIP

Response to €2 price increases – Broadband/Leased Line Bundle

(Base: All Bundle Owners – n=188)

Q.25 Which of the following would describe what your business would be most likely to do in response to this hypothetical €2 price increase of your broadband service?



75% of SME bundle businesses claim that they would not switch their current service if a €2 increase was introduced on the broadband portion of their bundle.

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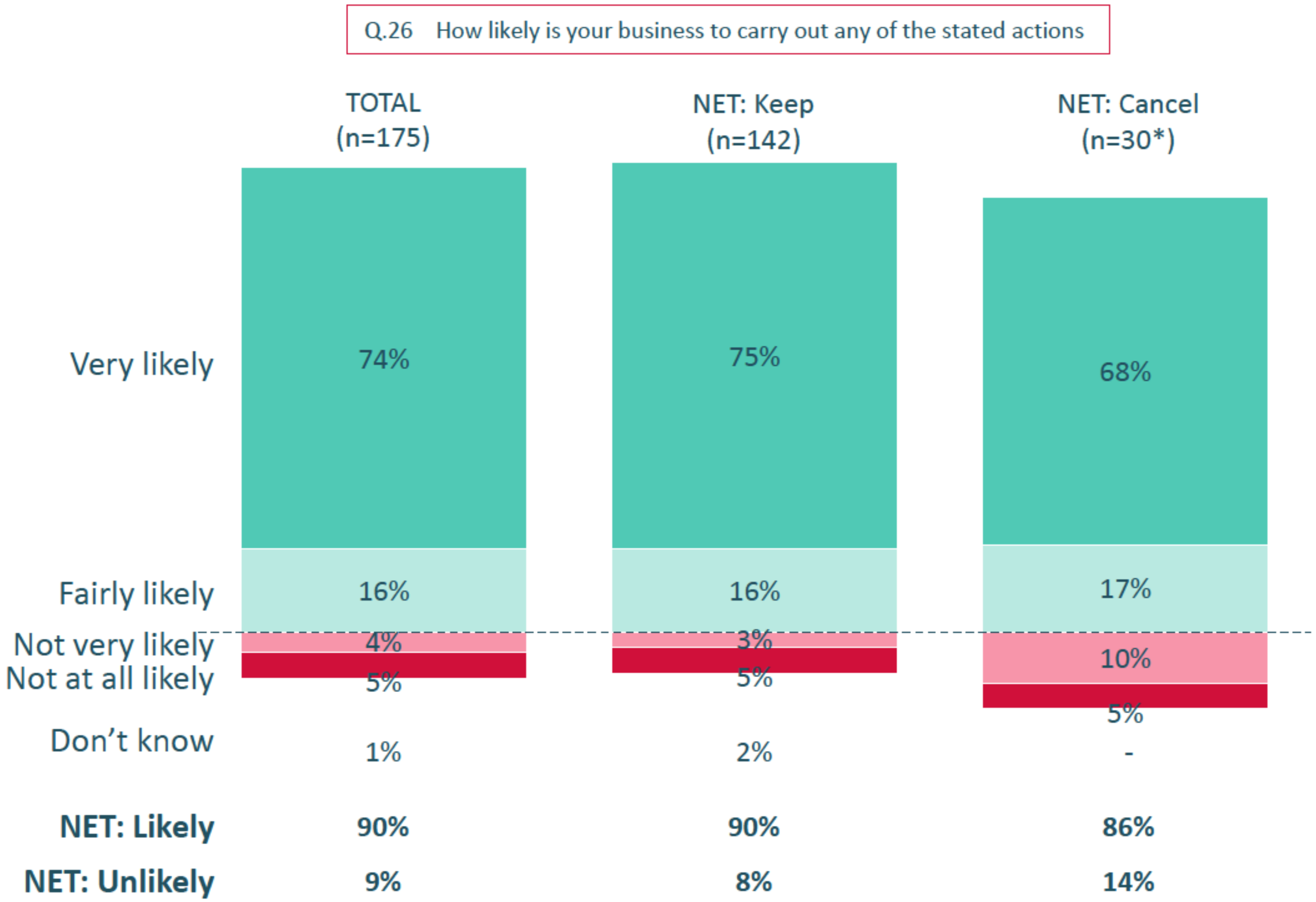
Likelihood To Follow Through With Decision – Broadband Bundle Owners

(Base: All Broadband Bundle Owners Aware Of Likely Action – n=175)



*Caution Small Base
Other Bundle types base too small to show

74% of SME bundle owners who claim they will change behaviour say they are very likely to do this .

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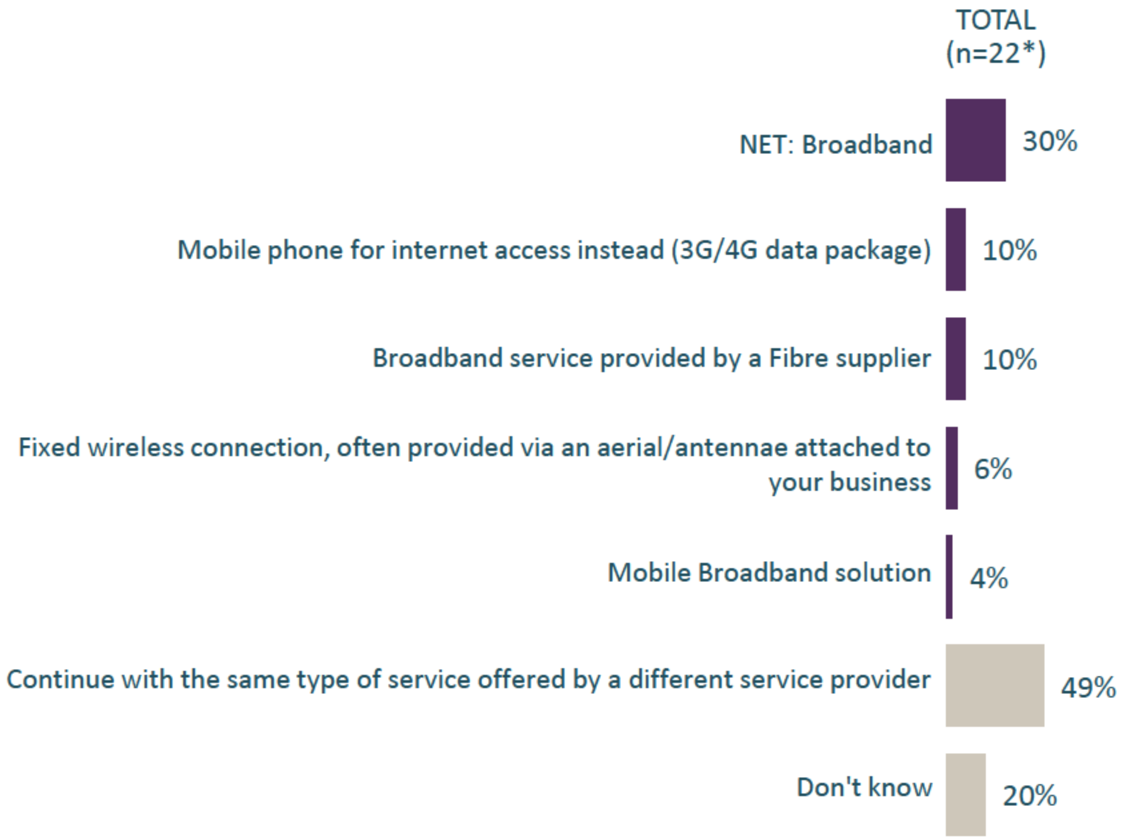
Service Likely to Switch To – Broadband Bundle Switchers

(Base: All Broadband Bundle and are likely to switch after price change –n=22*)

Q.27 You have just said that your business would be likely to give up your current Broadband. Which type of broadband/leased line service other than your current service, if any, would your organisation be most likely to switch to?



*Caution Small Base

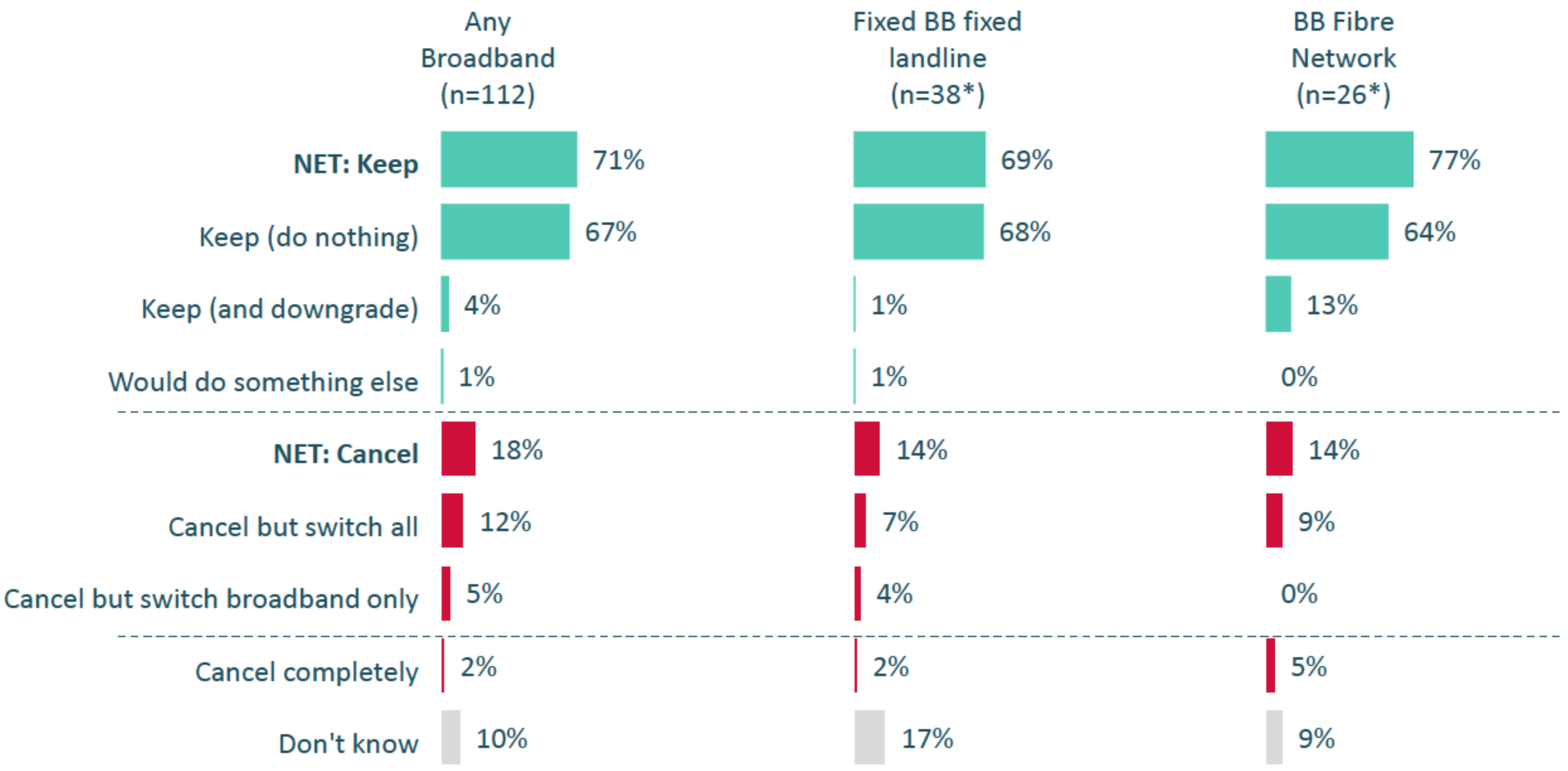
The number of SMEs surveyed that are bundle holders and are likely to switch in the event of a price change are so few that the base size is too small to draw any firm conclusions as to what action they would take.

SSNIP (Broadband Non Bundle Users)

Response to €2 price increases – Broadband Non Bundle

(Base: All non bundle broadband owners – n=112)

Q.30 If all broadband/leased line suppliers supplying your current broadband access type increase the broadband cost by €2 per month what action would your business take?



*Caution Small Base

71% of SME non bundle businesses claim they would not to switch from their current service if a €2 increase in the price of their broadband were to be introduced.

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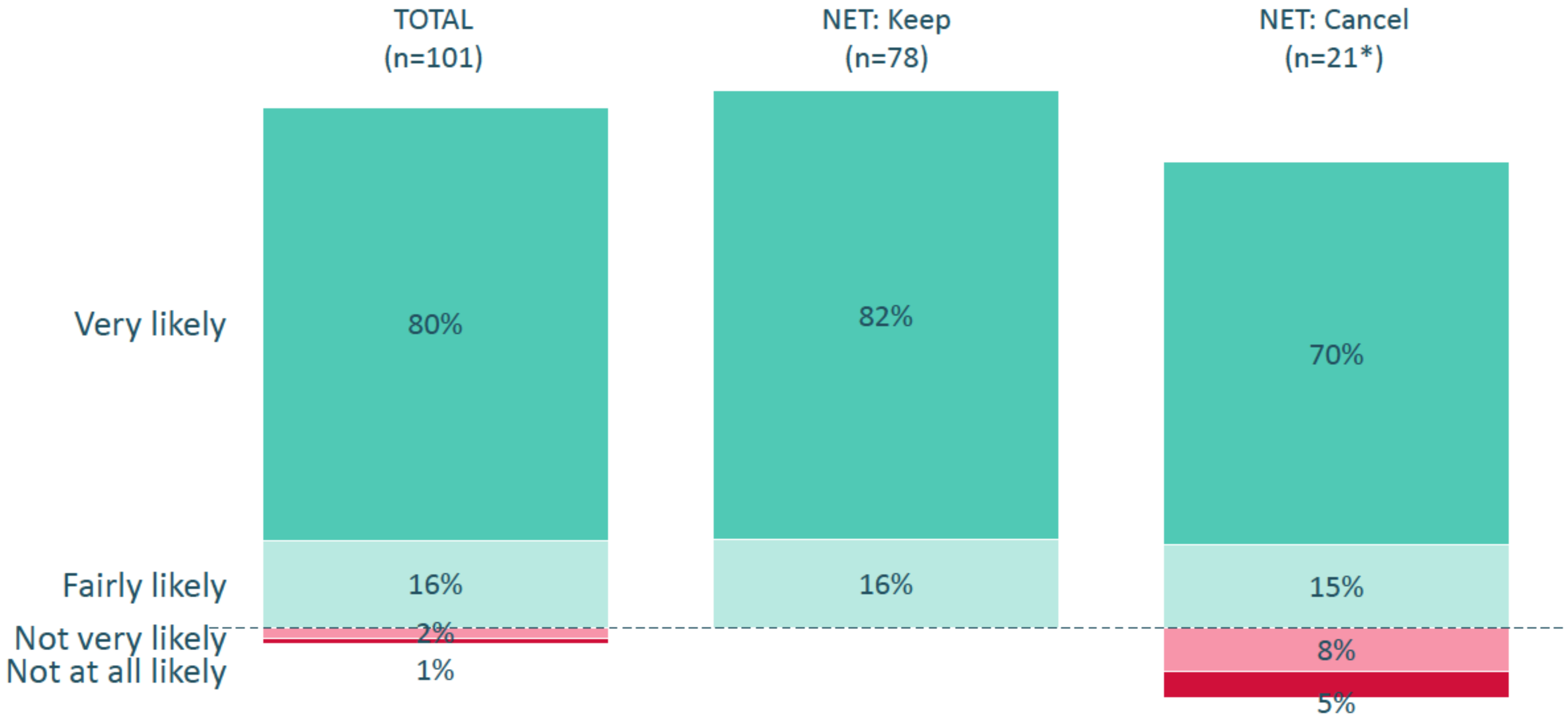
Likelihood To Follow Through With Decision – Non Bundle Users

(Base: All Non-bundle Owners Aware Of Likely Action - n= 101)

Q.31 How likely is your business to carry out any of the stated actions



	TOTAL	NET: Keep	NET: Cancel
Don't know	2%	2%	2%
NET: Likely	**95%**	**98%**	**84%**
NET: Unlikely	**3%**	**0%**	**14%**

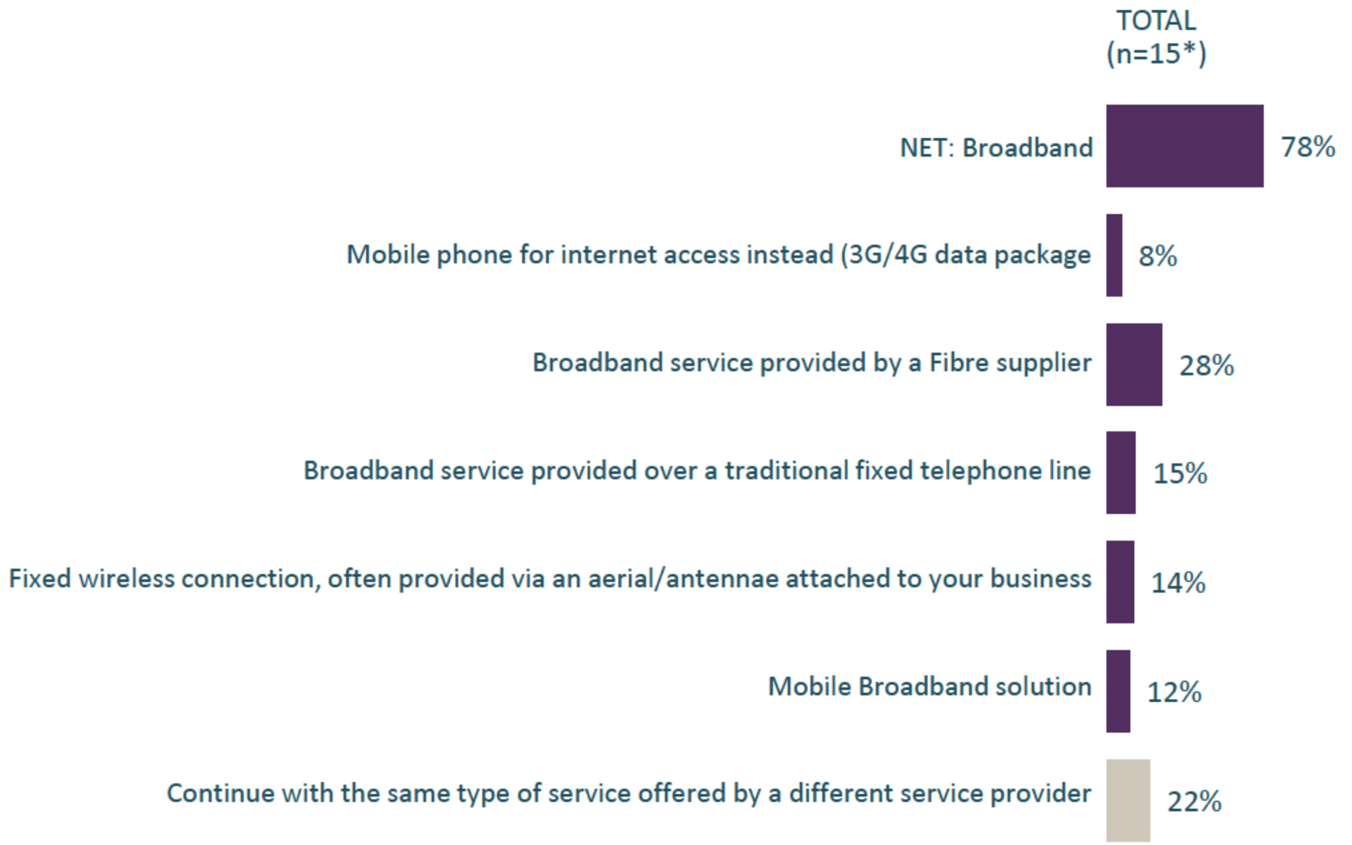
*Caution Small Base

80% of SME non bundle owners who claim they will change behaviour say they are very likely to do this.

Service Likely to Switch To – Broadband Non Bundle Switchers

(Base: All Non-bundle Owners Likely To Cancel/Switch Broadband/Leased Line – n=15)

Q.32 Which type of broadband/leased line service would your organisation be most likely to switch to?



*Caution Small Base

The number of SMEs surveyed that are non-bundle owners and are likely to switch in the event of a price change are so few that the base size is too small to draw any firm conclusions as to what action they would take.

Key Findings

Key Findings from this Survey

- Traditional fixed line remains the most common means of accessing broadband among Irish SME's with 56% of companies accessing broadband in this way but this is less common than in 2014 (64%). According to the survey Fibre access has increased most significantly in the time period and has increased from 15% to 28% in 2017.
- SME's continue to use their broadband service primarily for the same reason as they had previously, that is, using it for email and general internet use (98% of all SME's surveyed made this claim). The second most popular use of the broadband service is data services such as cloud computing (29% of SME's using their service for this reason)
- 38% of SME's surveyed claimed to know the maximum download speed of their broadband service. Among those who claim they know the speed of service the average speed claimed was 47Mbps compared with 36Mpbs in 2014.
- 65% of surveyed SME's have bundled their broadband service with other telecommunication services which remains similar to 2014 at 63% of SME's bundling their service. The most popular bundle type for SME's remains a Broadband Bundle with Fixed Phone (69%). The average monthly spend by SME's across all bundle types is €109.
- 73% of SME's surveyed claimed they are in contract with their primary broadband supplier. This figure represents an increase from 2014 where 64% claimed to be in contract with their primary broadband supplier.
- 58% of SME broadband users have previously switched in the past and the main reason for switching is due to more competitive price with service provider switched to. This reason was expressed by 61% of all those who switched supplier.

THANK YOU

ComReg: Market Analysis Research Consumer Survey

August 2017

Commission for Communications Regulation

REDC

Background and Objectives

/ In 2016 the Commission for Communications Regulation (ComReg) consulted on its Market Analysis of the wholesale broadband markets in Ireland (Wholesale Local Access 'WLA' and Wholesale Central Access 'WCA') and ComReg subsequently required up to date market research in advance of finalising its Response to Consultation and Decision.

/ The purpose of this market research, undertaken in 2017, is to update the key findings from the previous WLA/WLC market research study-undertaken by Red C in 2014. The findings from the 2014 market research are published in ComReg's 2016 Consultation (ComReg Document Number 16/96).

/ Specifically the 2017 market research examines access to broadband in the retail market, the modes of broadband access, switching behaviour amongst retail consumers and the incidence of bundling broadband products.

Methodology

/ 1,800 interviews were conducted on a national basis, with the sample weighted accordingly. All of these interviewers were conducted face to face on CAPI handheld machines, as follows:

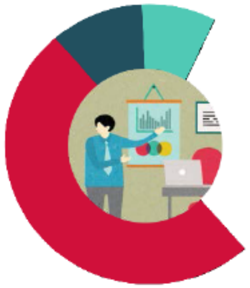
Region	Number of Interviews Conducted	Weighted Representative Sample
Dublin	504	504
Total Urban ex Dublin	595	569
Rural*	701	727

*Rural areas are those parts of the country with a population less than 1,500 people

/ Household decision makers for telecommunications were interviewed in the research with quota controls imposed to ensure the sample is representative of this population.

/ Fieldwork was conducted between April and June 2017.

Presentation Structure



- Sample Profile
- Broadband Penetration (including those without Access)
- Broadband Access and Usage
- Suppliers of broadband
- Bundling of broadband
- SSNIP (with broadband in a Bundle)
- SSNIP (for standalone broadband i.e. not in a Bundle)
- Contract periods & Switching behaviour
- Knowledge of broadband speeds

Sample Profile

Social Class Definitions

Higher managerial/ professional/ administrative (e.g. Established Doctor, Solicitor, Board Director in a large organisation 200+ employees, top level Civil Servant/Public Service/Government employee)	A
Intermediate managerial/ professional/ administrative (e.g. Newly qualified (under 3 years) Doctor, Solicitor/Lawyer, Board Director small organisation, Middle Manager in large organisation, Principle Officer in civil service/local government)	B
Supervisory or clerical/ junior managerial/ professional/ administrative (e.g. Office worker, Student Doctor/Med Student, Foreman with 25+ employees, Salesperson, Nurse, Teacher etc.) OR Student	C1
Skilled worker (e.g. Skilled Bricklayer, Carpenter, Plumber, Painter, Bus/ Ambulance Driver, HGV driver, AA patrolman, Police, Firefighter, Chef, Barman etc.)	C2
Semi or unskilled work (e.g. Manual workers, all apprentices to be skilled trades, Caretaker, Park Keeper, non-HGV Driver, Shop Assistant)	D
Casual worker – not in permanent employment OR Housewife/ Homemaker OR Retired and living on state/Government pension OR Unemployed or not working due to long-term sickness OR Full-time carer of other household member	E
Farmer / Agricultural worker	F

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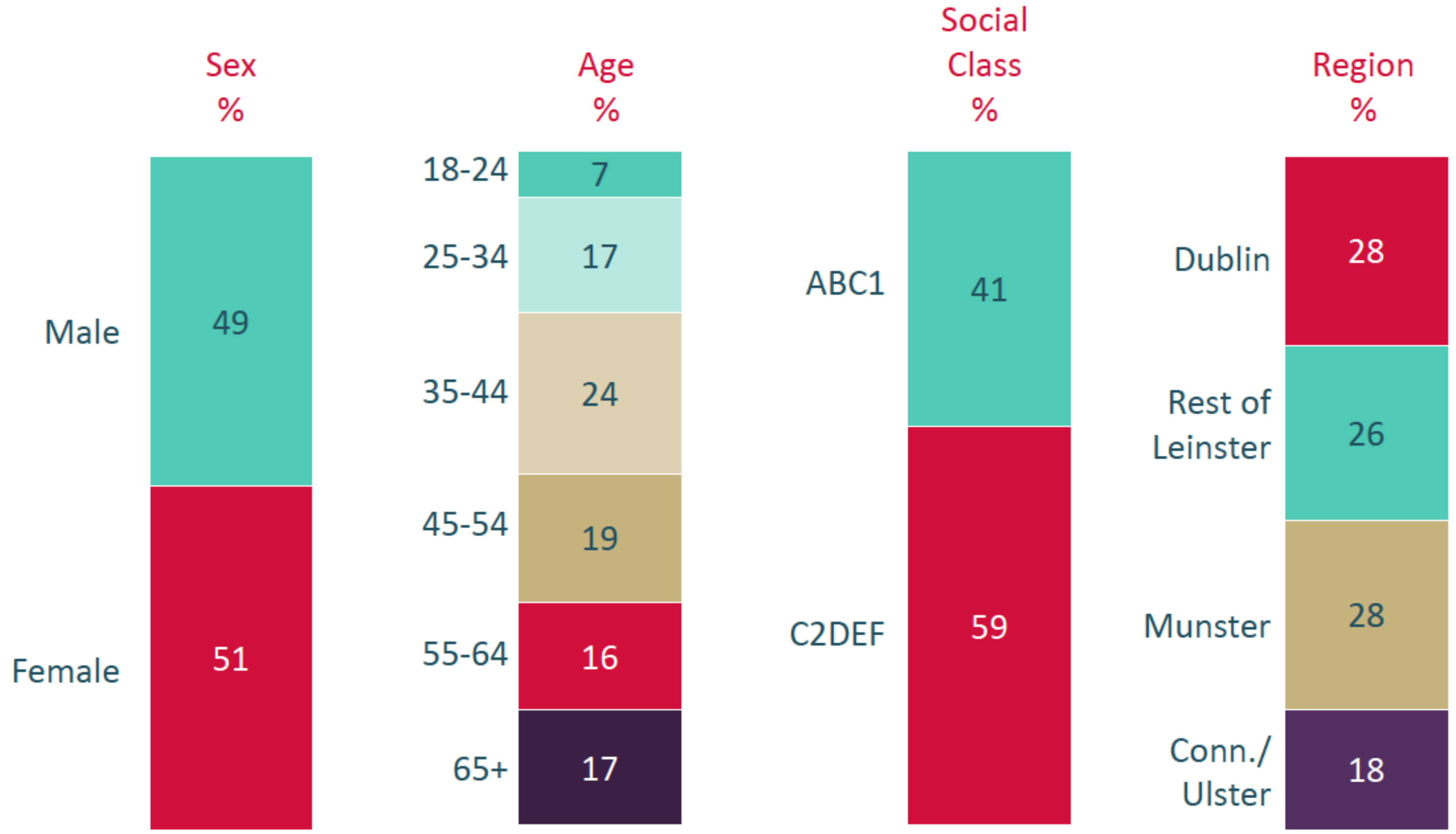
Sample Profile - I

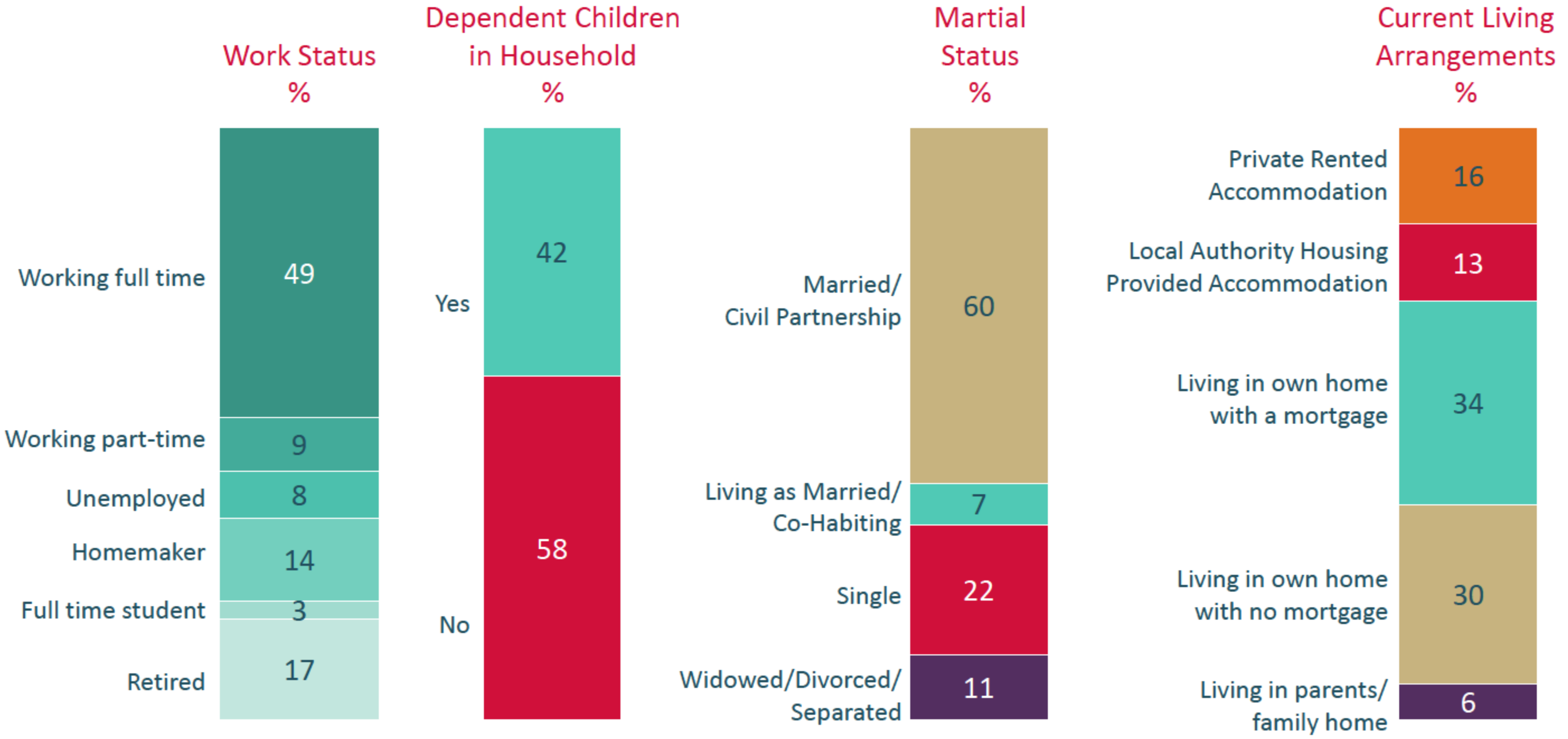
(Base: All Household Decision Makers 18+ - 1800)



The Sample profile is representative of household decision makers over 18 years old i.e. bill payers.

Sample Profile - II

(Base: All Household Decision Makers 18+ - 1800)



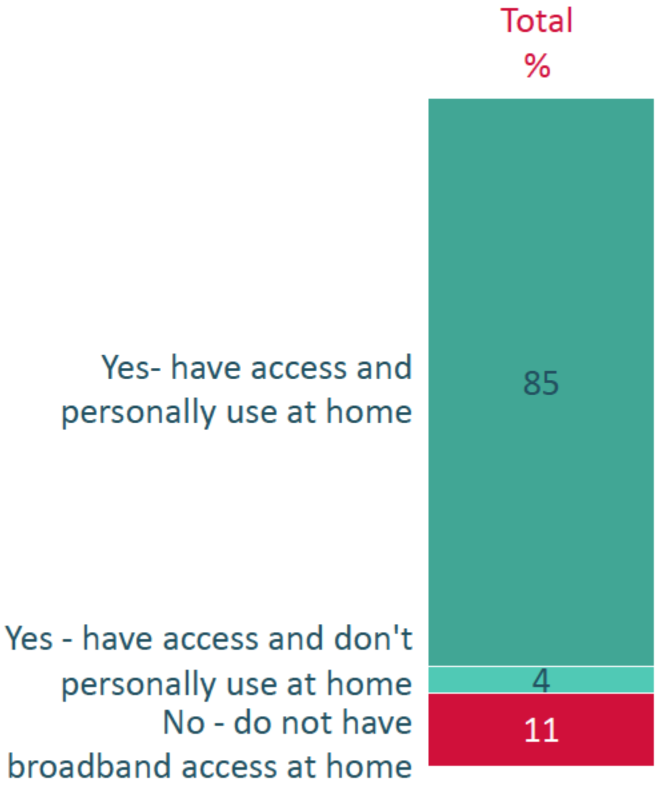
The profile above is representative of a national sample of household decision makers for telecommunication services - almost half of which are in full time employment.

Broadband Penetration (including those without Access)

Access to Broadband at Home

(Base: All Household Decision Makers 18+ - 1800)

Q.1 Do you and your household have access to broadband at home?



NET Yes 2017 **89%**

NET Yes 2014 **87%**

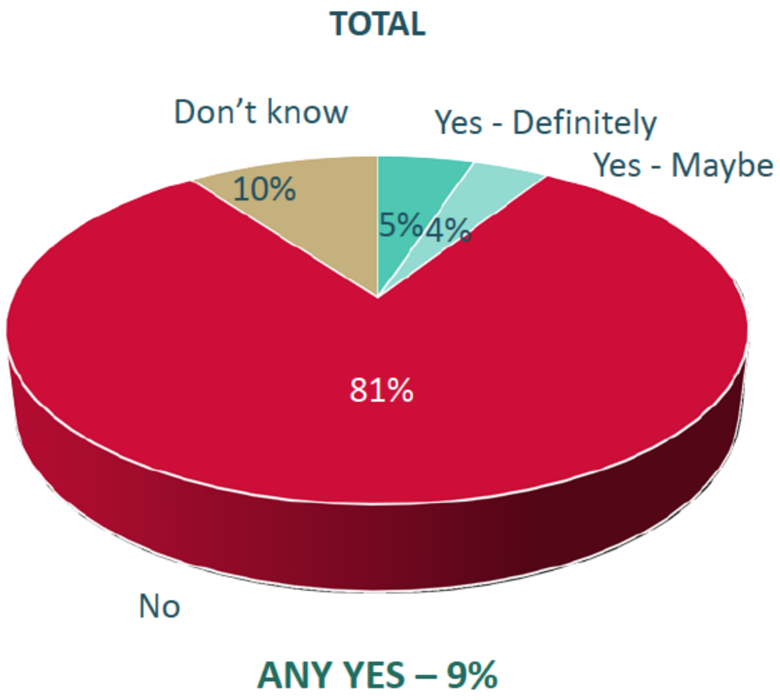
	Total Urban (n=1,099) %	Dublin (n=504) %	Total Urban Excl. Dublin (n=595) %	Rural (n=701) %
Yes- have access and personally use at home	87	94	81	83
Yes - have access and don't personally use at home	4	3	5	4
No - do not have broadband access at home	9	3	14	14
NET YES 2017 NET YES 2014	**91** 90	**97** 96	**86** 85	**86** 83

89% of those surveyed have access to broadband at home. Incidence is highest in Dublin (97%). The results are broadly similar to the 2014 market research with a slightly higher incidence of broadband access nationwide.

Respondents that plan to get Broadband Access in Next 12 Months

(Base: All Without Broadband Access At Home, n=183)

Q.5 Do you and your household plan on getting broadband access at your home in the next 12 months?



	Total Urban (n=94) %	Dublin (n=12*) %	Total Urban Excl. Dublin (n=82) %	Rural (n=89) %
Yes - Definitely	3	0	4	6
Yes - Maybe	2	0	3	5
No	80	75	81	82
Don't know	15	25	13	6
Any Yes	**6**	**0**	**6**	**12**

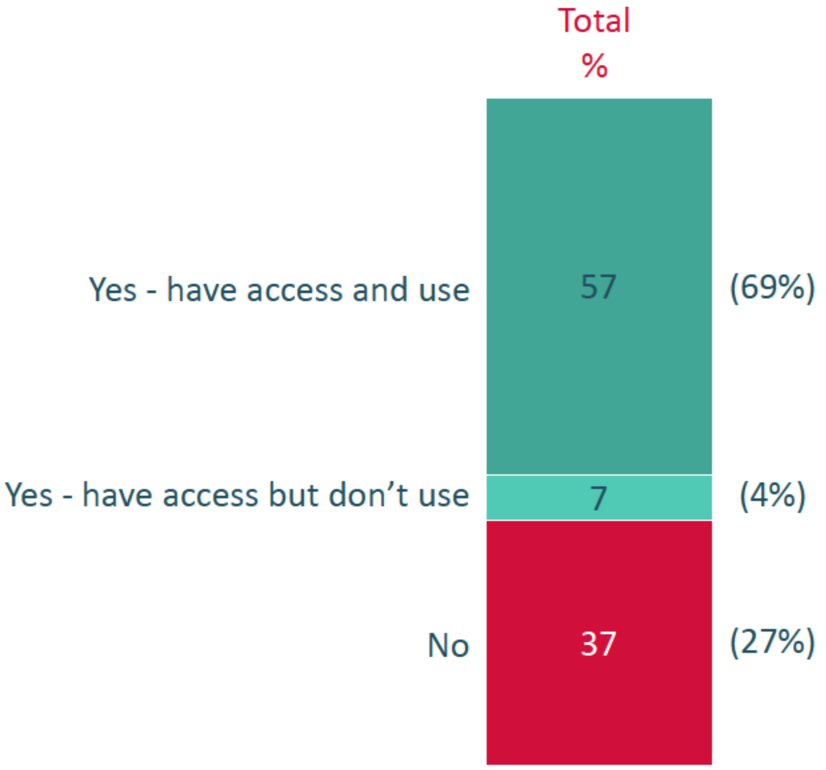
*Caution: Small Base Size

Amongst those surveyed that do not currently have broadband access at home, 5% are definitely planning to-get broadband within the next year, with the highest proportion in rural areas.

Home Phone Ownership

(Base: All Telecoms Decision Makers; n=1800)

Q.2 Do you and your household have a home phone (landline including line rental)?

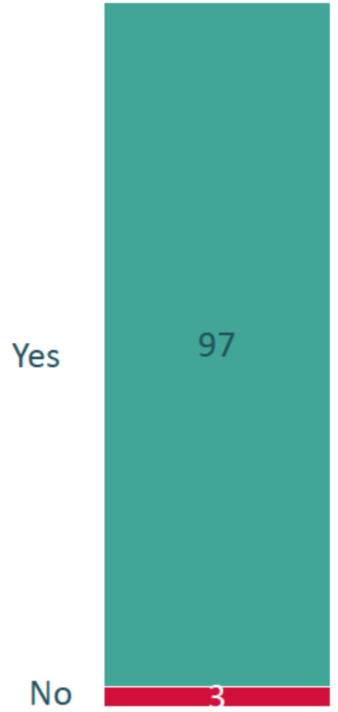


NET Yes 2017	**64%**
NET Yes 2014	73%

( ) Figures in brackets denote 2014 data, n=1,815

Mobile Phone Ownership

Q.3 Do you personally own a mobile phone?



NET Yes 2017	**97%**
NET Yes 2014	98%

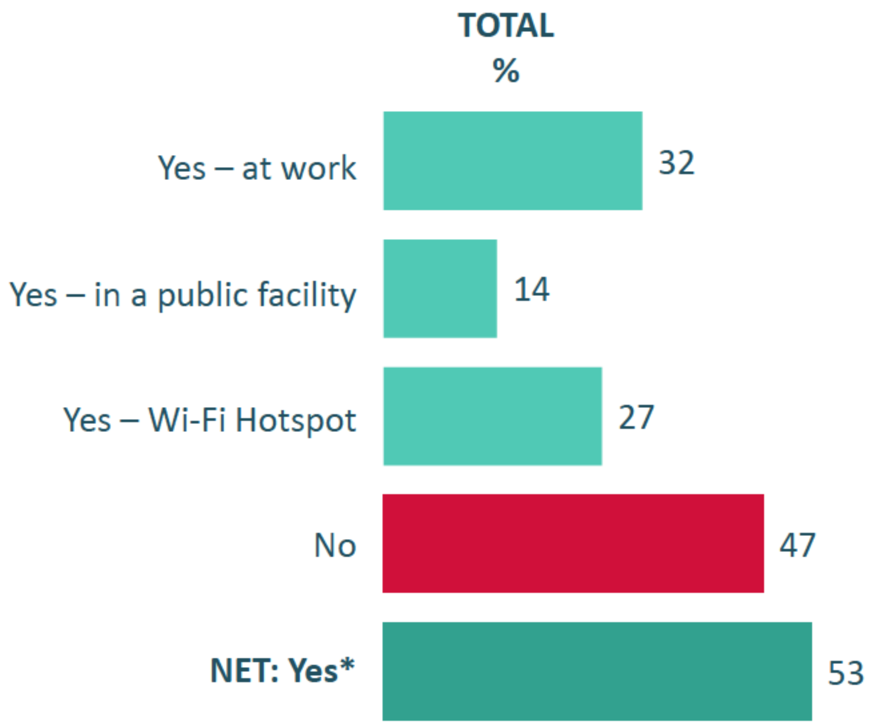
64% of those surveyed have a home phone (a 9% reduction compared to 2014). 97% personally own a mobile phone.

Broadband Access and Usage

Broadband Access Outside of Home

(Base: All Mobile Phone Owners; n=1746)

Q.4 Other than 3G/4G data on your mobile phone, do you and your household have access to and use BROADBAND outside your home?



	Total Urban (n=1065) %	Dublin (n=500) %	Total Urban Excl. Dublin (n=565) %	Rural (n=681) %
Yes – at work	36	46	28	25
Yes – in a public facility	17	18	15	10
Yes – Wi-Fi Hotspot	24	25	30	25
No	42	37	47	55
NET: Yes*	58	63	53	45

***NOTE: 'NET YES' refers to those selecting one or more means of accessing broadband outside of the home**

47% of mobile phone users do not have access to or use broadband outside their home.

Means of Accessing Broadband at Home – Multiple Access

(Base: All With Broadband Access At Home, n=1616)

Q.8 Which means of accessing broadband are used in your home?

	Any Access (Multiple Responses) %	2014 (n=1583) %	Total Urban (n=1040) %	Dublin (n=492) %	Total Urban Excl. Dublin (n=512) %	Rural (n=612) %
Fixed broadband via a traditional fixed telephone line	43	54	33	26	39	58
Broadband service provided via a cable TV	21	26	33	50	15	3
Broadband provided by a Fibre network	19	7	22	21	22	15
Mobile Broadband	8	8	6	1	11	11
Fixed wireless connection	4	4	3	1	5	5
Mobile Phone using 3G/4G data package	2	6	1	1	1	2
Broadband provided by a Satellite network	2	*	1	*	2	4
Other	1	*	1	1	1	1
Don't know	2	*	2	*	3	4

19% of respondents reported accessing broadband provided by a fibre network (compared to 7% in 2014).

Most Often Means of Accessing Broadband at Home

(Base: All With Broadband Access At Home, n=1616)

Q8/9 Which means of accessing broadband do you and your household use **most often when at home**?

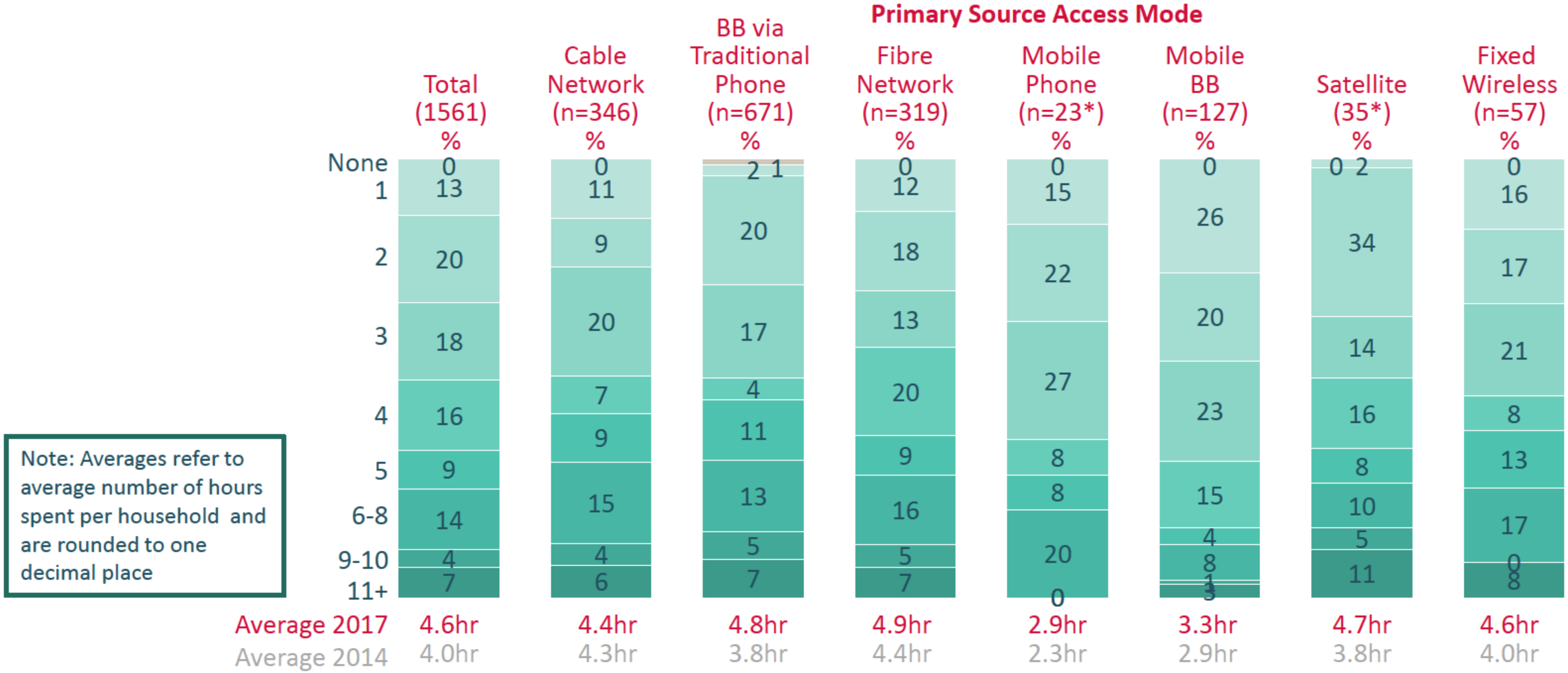
	Any Access %	2014 (n=1583) %	Total Urban (n=1040) %	Dublin (n=492) %	Total Urban Excl. Dublin (n=512) %	Rural (n=612) %
Fixed broadband via a traditional fixed telephone line	42	54	33	26	39	58
Broadband service provided via a cable TV	21	26	33	50	15	2
Broadband provided by a Fibre network	19	6	22	21	22	15
Mobile Broadband	8	8	6	1	11	10
Fixed wireless connection	4	4	3	1	5	5
Broadband provided by a Satellite network	2	*	1	*	2	4
Mobile Phone using 3G/4G data package	1	2	1	1	1	1
Other	1	*	1	1	1	1
Don't know	2	*	2	*	3	4

Fixed broadband via a traditional fixed telephone line is the primary mode of broadband access (42% of respondents).

Number Of Hours On Average Household Access Internet

(Base: All Using Primary Access Mode; n=1561)

Q11 You mentioned that you and your household access the internet via… In an average day how many hours do you and your household access via….



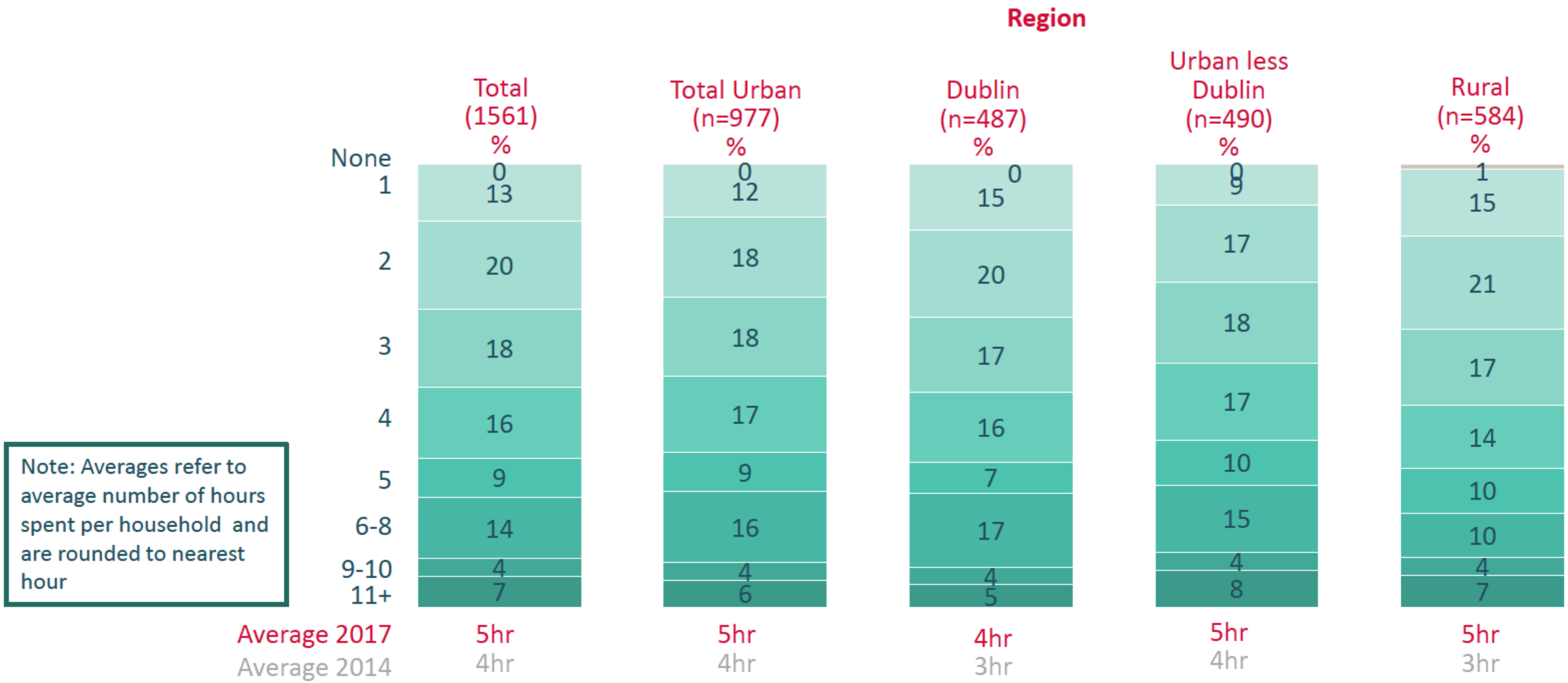
*Caution: Small Base Size

According to this survey, the average household accesses the internet for 4.6 hours per day, up from 4 hours in 2014.

Number Of Hours On Average Household Access Internet By Region

(Base: All Using Primary Access Mode; n=1561)

Q11 You mentioned that you and your household access the internet via ….In an average day how many hours do you and your household access via….



Among those surveyed the average estimates of number of hours spent by household per day accessing the internet is lowest in Dublin (4 hours).

What Is Your Primary Broadband Access Used For?

(Base: All With Broadband Access At Home, n=1616)

Q.12 What do you and your household use your main broadband access for?

Primary Means of Accessing Broadband

	TOTAL %	2014 (n=1583) %	Traditional Phone (n=668) %	Cable Network (n=345) %	Fibre Network (n=319) %	Mobile broadband (n=121) %	Other broadband (n=123) %
Browsing the internet	92	94	91	92	94	97	93
Using Social Media	59	69	59	61	62	50	69
Using email	59	78	54	70	67	45	63
Purchasing goods/services	50	57	50	49	53	47	54
Manage Banking/Pay Bills/Other Services	45	52	43	49	53	32	50
Using real time video/voice calling	39	39	33	45	52	24	42
Downloading/streaming movies/music/TV programmes	35	29	36	43	35	20	27
Gaming or interactive gaming	22	21	24	26	17	13	25
Working at home/Teleworking	20	16	18	27	23	15	17
Study/College	14	24	15	12	17	5	20

Amongst those surveyed, broadband access is most commonly used to browse the internet (92%) with social media (59%) and email (59%) also popular.

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What Is Your Primary Broadband Access Used For?

(Base: All With Broadband Access At Home, n=1616)

Q.12 What do you and your household use your main broadband access for?

	TOTAL %	2014 (n=1583) %	Total Urban (n=1,004) %	Dublin (n=492) %	Urban less Dublin (n=512) %	Rural (n=612) %
Browsing the internet	92	94	92	89	94	94
Using Social Media	59	69	58	59	57	61
Using email	59	78	61	69	53	56
Purchasing goods/services	50	57	49	47	50	51
Manage Banking/Pay Bills/Other Services	45	52	46	48	44	44
Using real time video/voice calling	39	39	44	44	44	31
Downloading/streaming movies/music/TV programmes	35	29	38	44	31	31
Gaming or interactive gaming	22	21	24	25	22	19
Working at home/Teleworking	20	16	22	26	18	18
Study/College	14	24	14	15	13	15

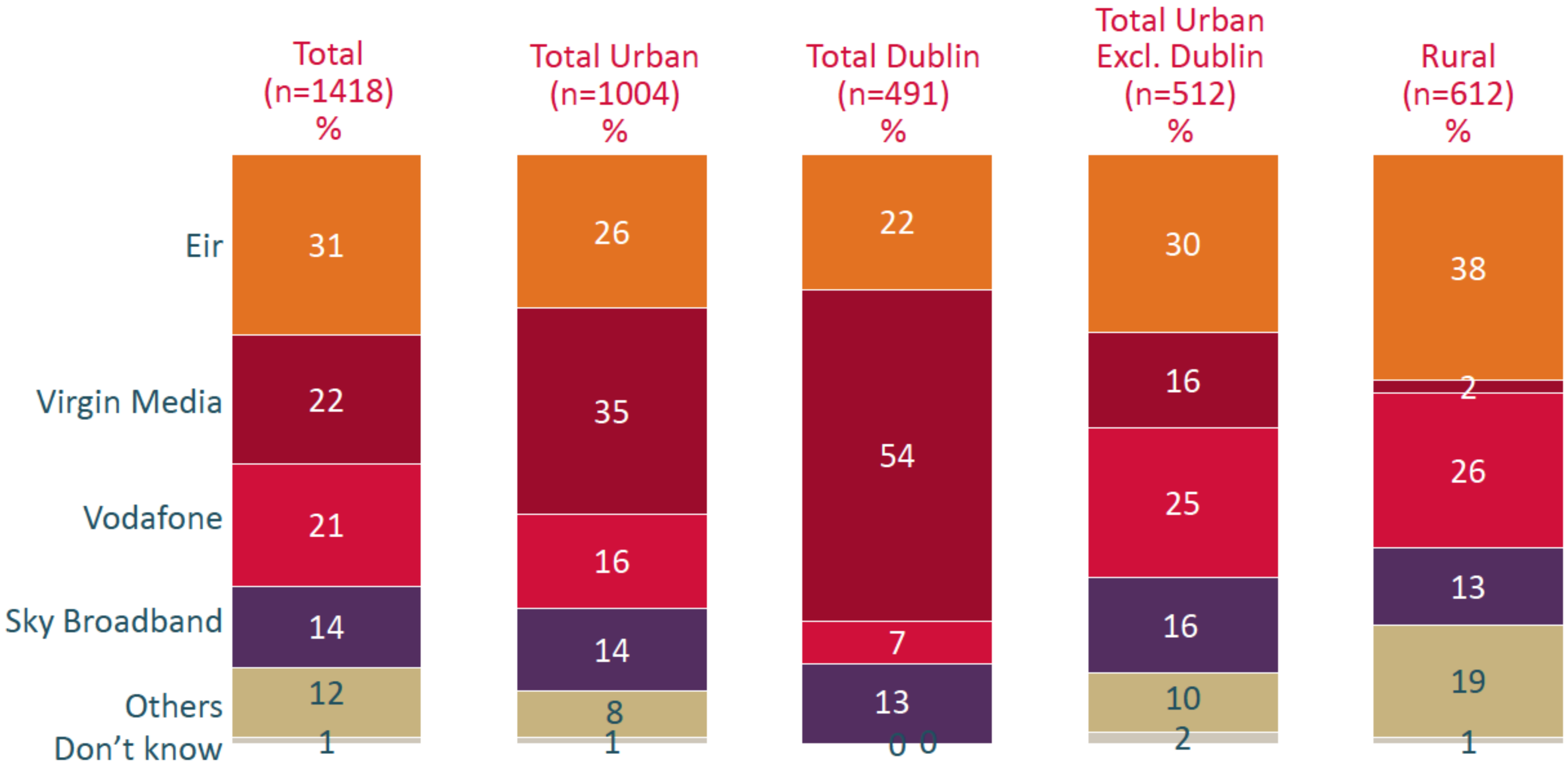
Comparing the survey results from 2017 using social media and using email over primary broadband has declined significantly from 2014 while downloading/steaming movies has increased, as has working from home.

Suppliers of Broadband

Current Primary Access Broadband Supplier

(Base: All With Broadband Access; n=1616)

Q.13 You mentioned earlier that you had broadband access provided over ….. What company do you currently use as your main home broadband provider?

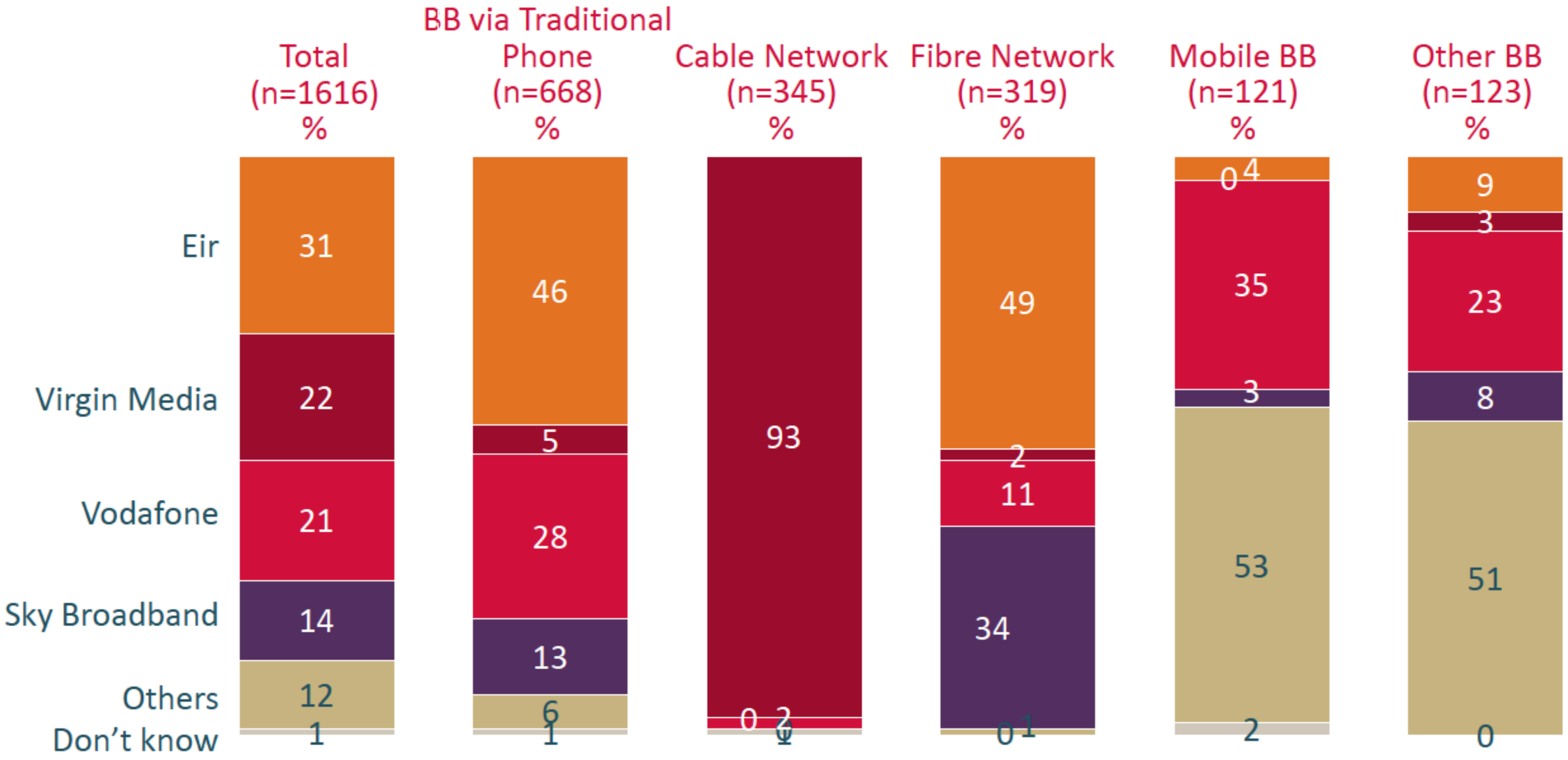


According to the survey, Eir has 31% share of the primary access broadband market, growing to 38% amongst those in Rural areas. 54% of Dublin residents interviewed have Virgin Media as their primary broadband supplier.

Current Primary Access Broadband Supplier

(Base: All With Broadband Access; n=1616)

Q.13 You mentioned earlier that you had broadband access provided over ..... What company do you currently use as your main home broadband provider?



In terms of providers of respondents' main broadband provider, Eir accounts for 31% overall.

Which TV Companies or Services are Used?

(Base: All Household Decision Makers 18+ - 1800)

Q.14 Which of the following companies or services do you and your household use to watch TV programmes or access TV services? Which Others?

	Total Mention %	2014 (n=1815) %	Total Urban (n=1099) %	Dublin (n=504) %	Total Urban Excl. Dublin (n=595) %	Rural (n=701) %
Sky TV	45	47	39	30	47	54
Saorview	20	21	14	5	21	28
Virgin Media	18	23	29	47	14	1
Eir TV	6	3	7	8	5	4
Freesat	2	9	2	2	1	2
Netflix	2	9	2	2	2	2
Access via internet	1	3	*	*	*	1
Others	4	1	4	1	6	4
Don't have a TV subscription	1	4	1	2	*	1
Don't Know	2	1	3	2	3	1

Sky provides TV services to 45% of those surveyed. Saorview (20%) and Virgin Media (18%) are also popular. While multiple responses were possible, respondents only selected one company as their TV service provider.

Which TV Companies or Services are Used?

(Base: All Household Decision Makers 18+ - 1800)

Q.14 Which of the following companies or services do you and your household use to watch TV programmes or access TV services? Which Others?

	Total Mention %	2014 (n=1815) %	BB Trad Phone (n=668) %	Cable Network (n=345) %	Fibre Network (n=319) %	Mobile BB (n=121) %	Other BB (n=123) %
Sky TV	45	47	55	10	62	46	53
Saorview	20	21	20	2	9	39	23
Virgin Media	18	23	5	79	4	1	4
Eir TV	6	3	7	*	17	0	3
Freesat	2	9	2	2	1	1	3
Netflix	2	9	1	3	2	3	2
Access via internet	1	3	1	0	1	2	1
Others	4	1	4	1	2	5	7
Don't have a TV subscription	1	4	1	1	1	0	2
Don't Know	2	1	2	3	1	3	2

55% of respondents using fixed broadband via a traditional fixed telephone line use Sky as their TV service provider. 79% of those using a cable network as their primary broadband access mode use Virgin Media as their TV service provider. While multiple responses were possible, respondents only selected one company as their TV service provider.

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Bundling of Broadband

Bundle Incidence of Broadband Service

(Base: All Respondents Who have Broadband Access At Home, n=1616)

Q.15 Which of the following best describes how you are billed for your broadband/TV/Landline/mobile phone?

	Total %	2014 (n=1583) %	Total Urban (n=1004) %	Total Dublin (n=492) %	Total Urban Ex Dublin (n=512) %	Rural (n=612) %
I receive a single bill that includes at least one of the other services I have	60	76	66	82	50	51
Separate bill with other services from different provider	19	10	16	9	23	25
I only have broadband	10	4	8	6	9	14
Separate bill with other services from same provider	8	10	8	2	14	7
Don't know	3	-	2	1	3	4
NET: Non Bundle	**37%**	**24%**	**32%**	**17%**	**47%**	**46%**

60% of those with access to broadband at home have their broadband service bundled with at least one other service. Incidence of bundling is highest in Dublin (82%).

Bundle Incidence of Broadband Service

(Base: All Respondents Who have Broadband Access At Home, n=1616)

Q.15 Which of the following best describes how you are billed for your broadband/TV/Landline/mobile phone?

	Total %	2014 (n=1583) %	BB Trad Phone (n=668) %	Cable Network (n=345) %	Fibre Network (n=319) %	Mobile BB (n=121) %	Other BB (n=123) %
I receive a single bill that includes at least one of the other services I have	60	76	62	81	70	8	29
Separate bill with other services from different provider	19	10	17	7	13	47	52
I only have broadband	10	4	10	5	7	25	14
Separate bill with other services from same provider	8	10	9	7	8	8	4
Don't know	3	-	2	1	1	11	1
NET: Non Bundle	**37%**	**24%**	**36%**	**18%**	**29%**	**81%**	**70%**

Bundling is highest amongst Cable Network users (81%).

REDC

Bundle Incidence of Broadband Service x Core Suppliers

(Base: All Respondents Who have Broadband Access At Home, n=1616)

Q.15 Which of the following best describes how you are billed for your broadband/TV/Landline/mobile phone?

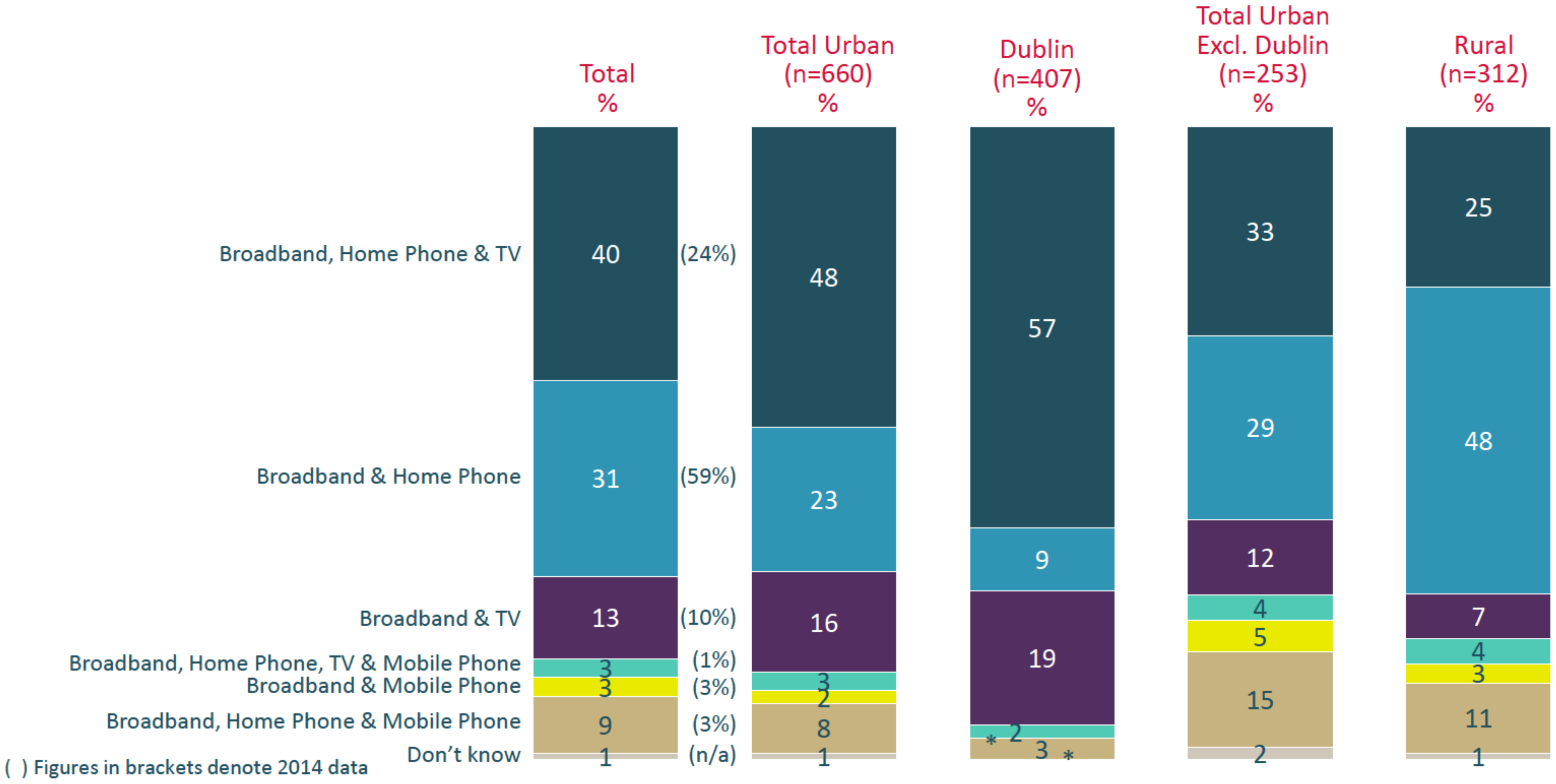
	Total %	2014 (n=1583) %	Eir (n=471) %	Sky (n=227) %	Virgin Media (n=365) %	Vodafone (n=323) %
I receive a single bill that includes at least one of the other services I have	60	76	68	83	82	39
Separate bill with other services from different provider	19	10	14	2	6	31
I only have broadband	10	4	9	2	4	19
Separate bill with other services from same provider	8	10	7	11	7	8
Don't know	3	-	2	2	1	3
NET: Non Bundle	**37%**	**24%**	**30%**	**15%**	**18%**	**58%**

Proportionately, customers of Sky and Virgin Media have the highest incidence of bundling services.

Bundle Type

(Base: All Decision Makers With Broadband Access In A Bundle n=972)

Q.16 Including your broadband services, which of the following services are also included on your single bill?

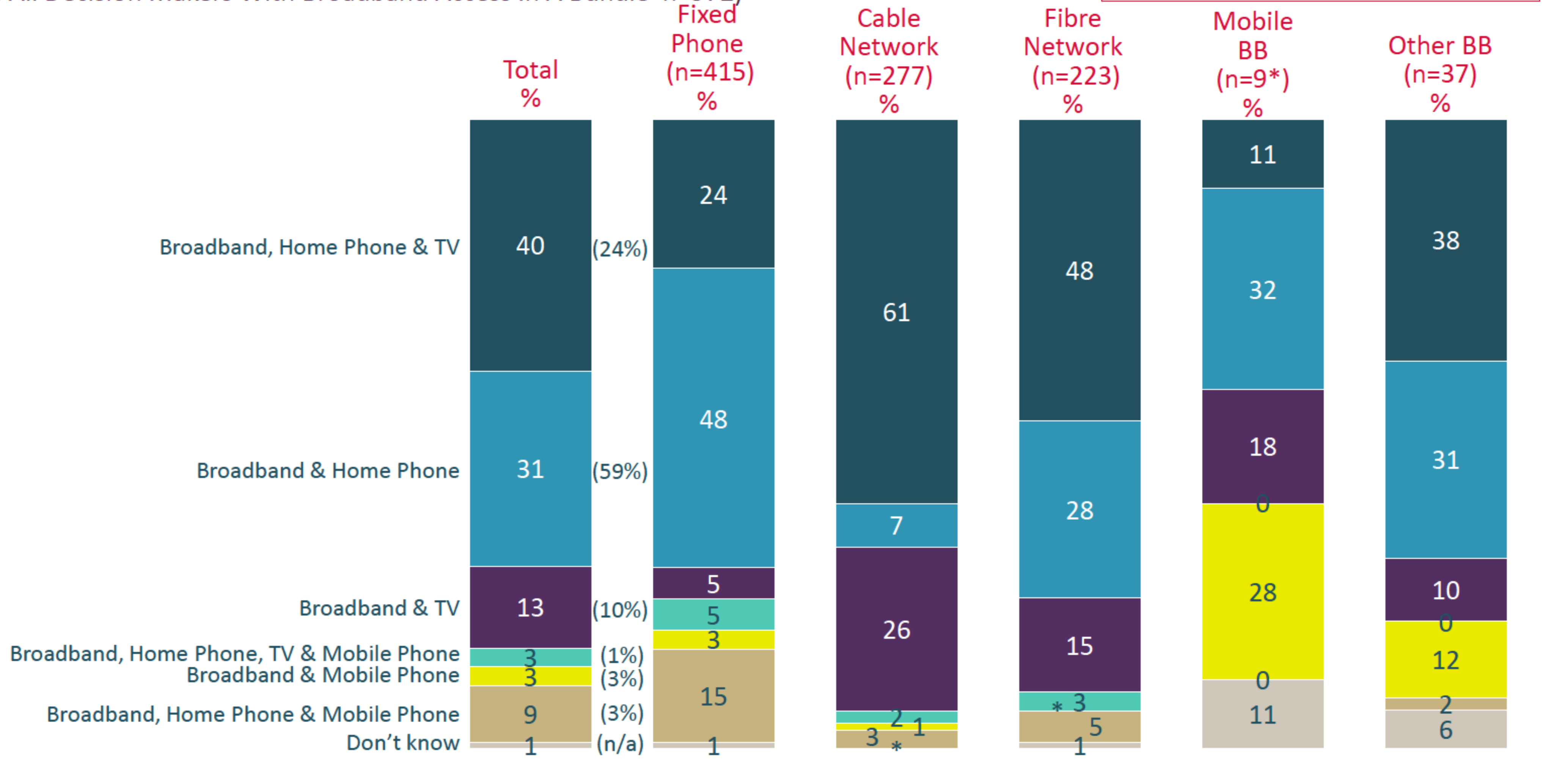


The most popular bundle amongst those surveyed is Broadband, Home Phone & TV (40%), growing to 57% in Dublin. 48% of bundle owners in rural areas have a Broadband & Home Phone bundle.

Bundle Type

(Base: All Decision Makers With Broadband Access In A Bundle n=972)

Q.16 Including your broadband services, which of the following services are also included on your single bill?



( ) Figures in brackets denote 2014 data

*Caution: Small Base Size

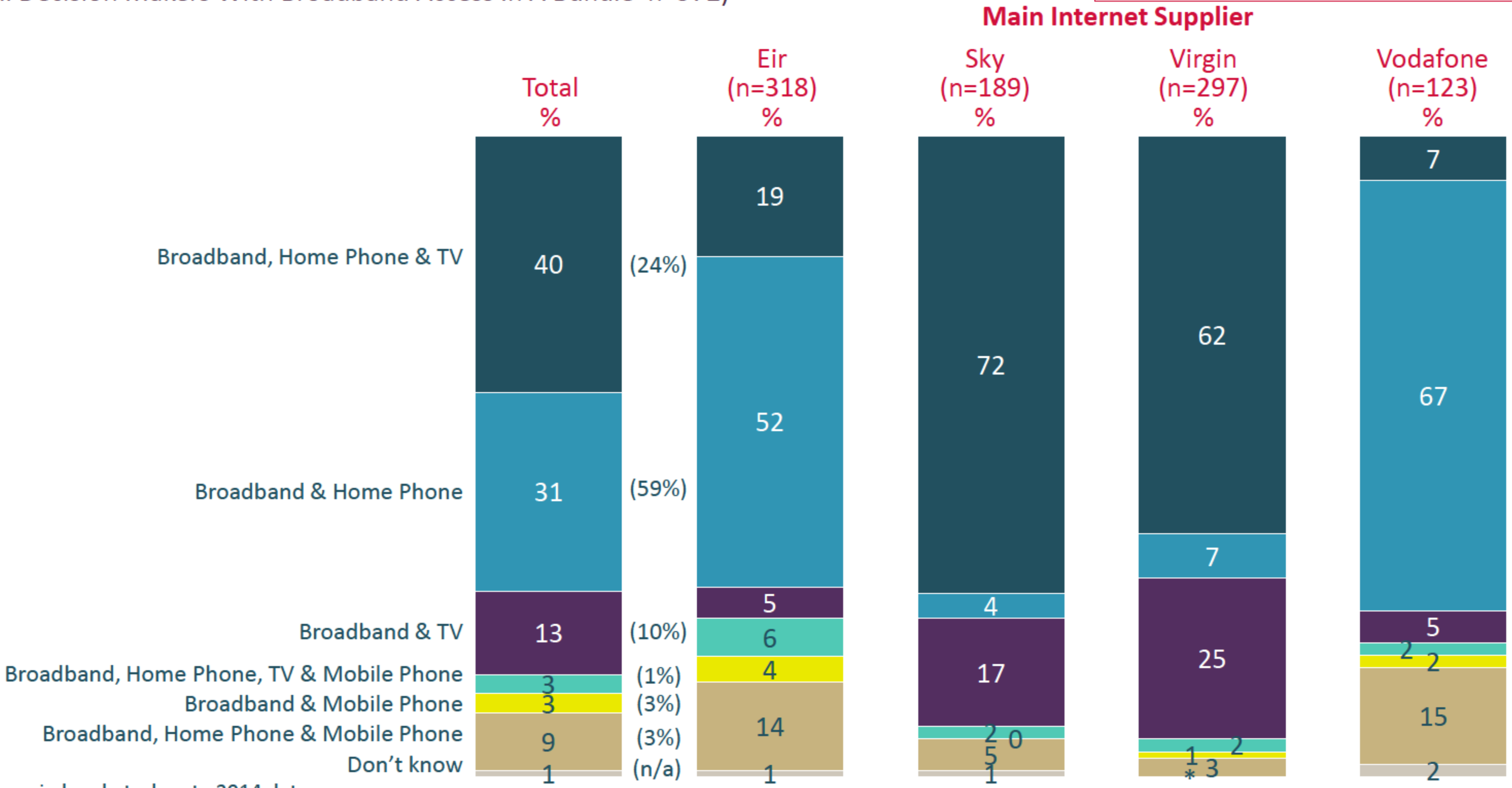
* Small base

According to the survey 61% of bundle owners on a Cable Network bundle Broadband, Home Phone & TV.

Bundle Type by Supplier

(Base: All Decision Makers With Broadband Access In A Bundle n=972)

Q.16 Including your broadband services, which of the following services are also included on your single bill?



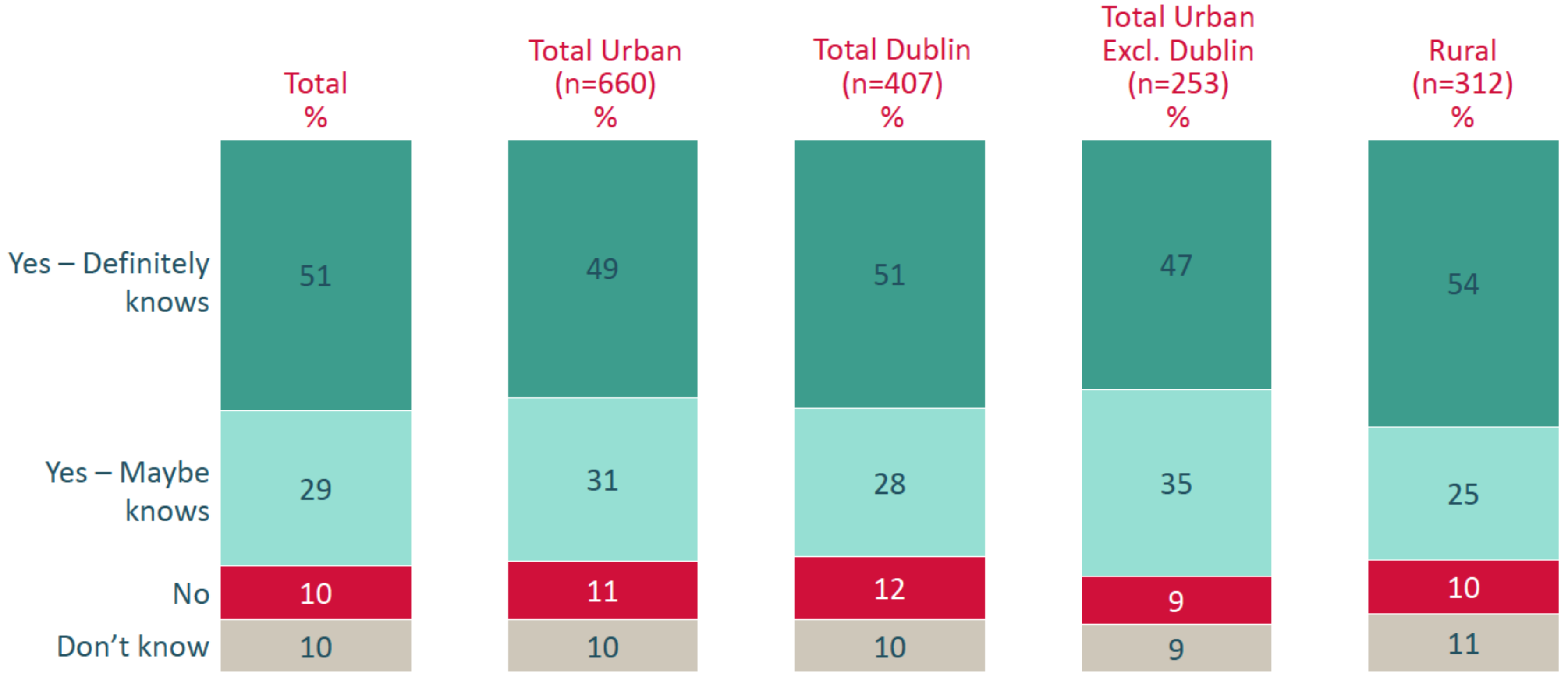
( ) Figures in brackets denote 2014 data

Dual Play Bundles (Broadband and Home Phone) are the most popular bundle with Eir and Vodafone Customers whereas Triple Play Bundles (Broadband, Home Phone and TV) are the most popular bundle with Sky and Virgin Media Customers.

Knowledge of Broadband Bundle Cost

(Base: All With Broadband Access who know the bundle type they have, n=966)

Q.17 Do you know how much you pay for your bundled service on a monthly basis?



	Total	Total Urban	Total Dublin	Total Urban Excl. Dublin	Rural
NET: Yes 2017	**80%**	**80%**	**79%**	**82%**	**79%**
NET: Yes 2014	78%	74%	72%	76%	82%

51% of bundle owners claim that they definitely know how much they pay for their bundle service on a monthly basis.

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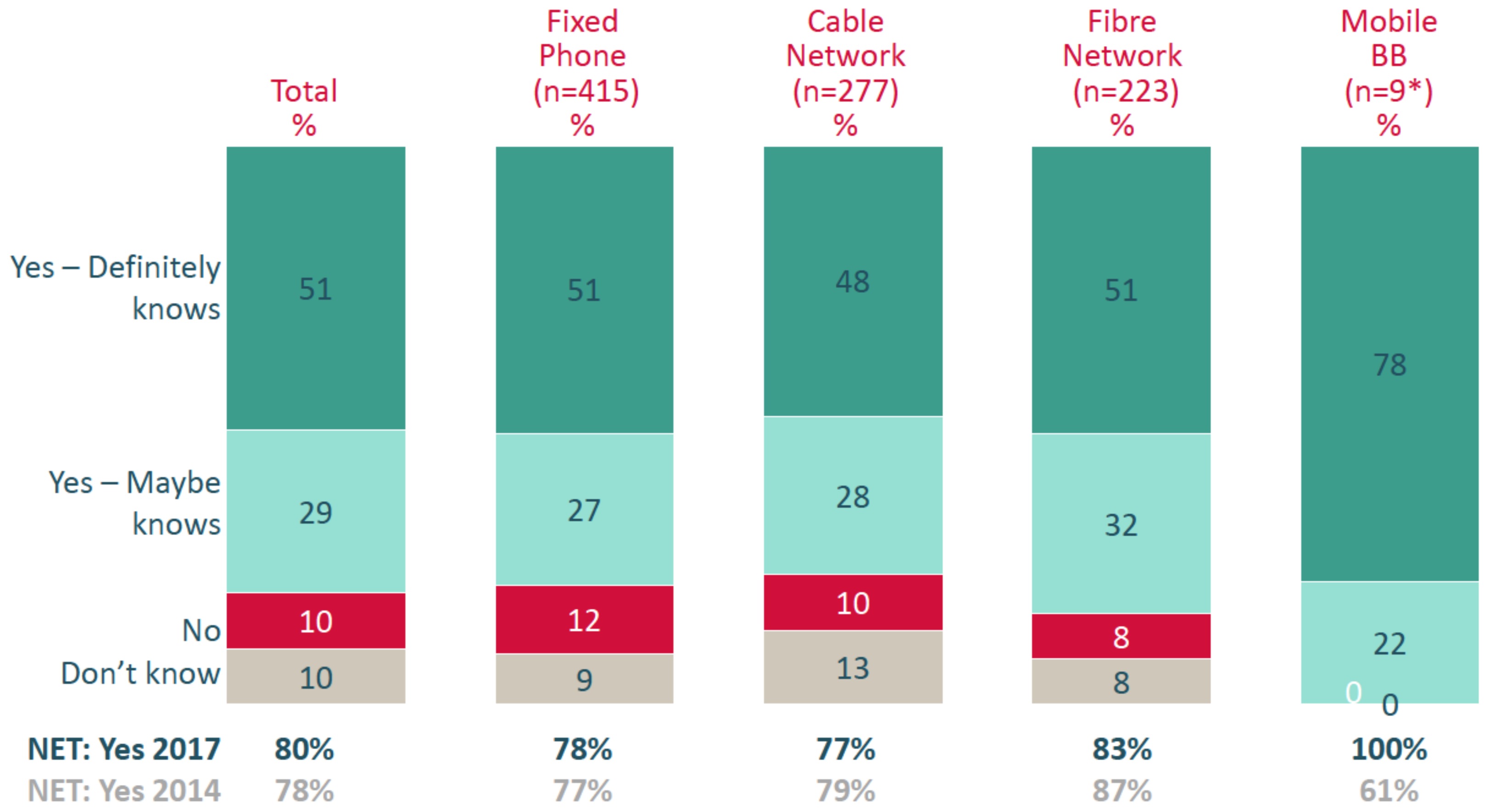
Knowledge of Broadband Bundle Cost

(Base: All With Broadband Access who know the bundle type they have, n=966)

Q.17 Do you know how much you pay for your bundled service on a monthly basis?



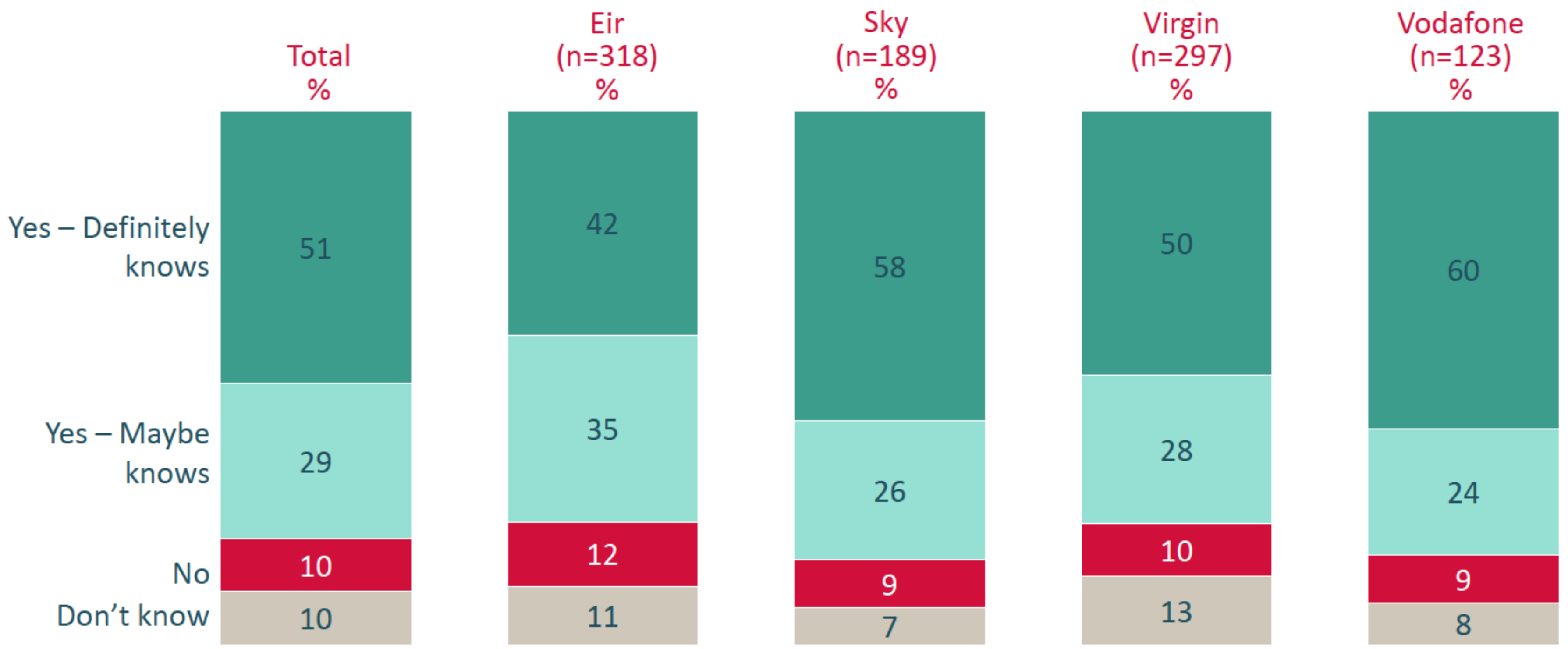
*Caution: Small Base Size

The incidence of definitely knowing the bundle cost per month is consistent across all modes of accessing broadband (notwithstanding the low sample size for mobile broadband).

Knowledge of Broadband Bundle Spend per Month

(Base: All With Broadband Access who know the bundle type they have, n=966)

Q.17 Do you know how much you pay for your bundled service on a monthly basis?



	Total	Eir	Sky	Virgin	Vodafone
NET: Yes 2017	**80%**	**77%**	**83%**	**77%**	**83%**
NET: Yes 2014	78%	75%	74%	78%	87%

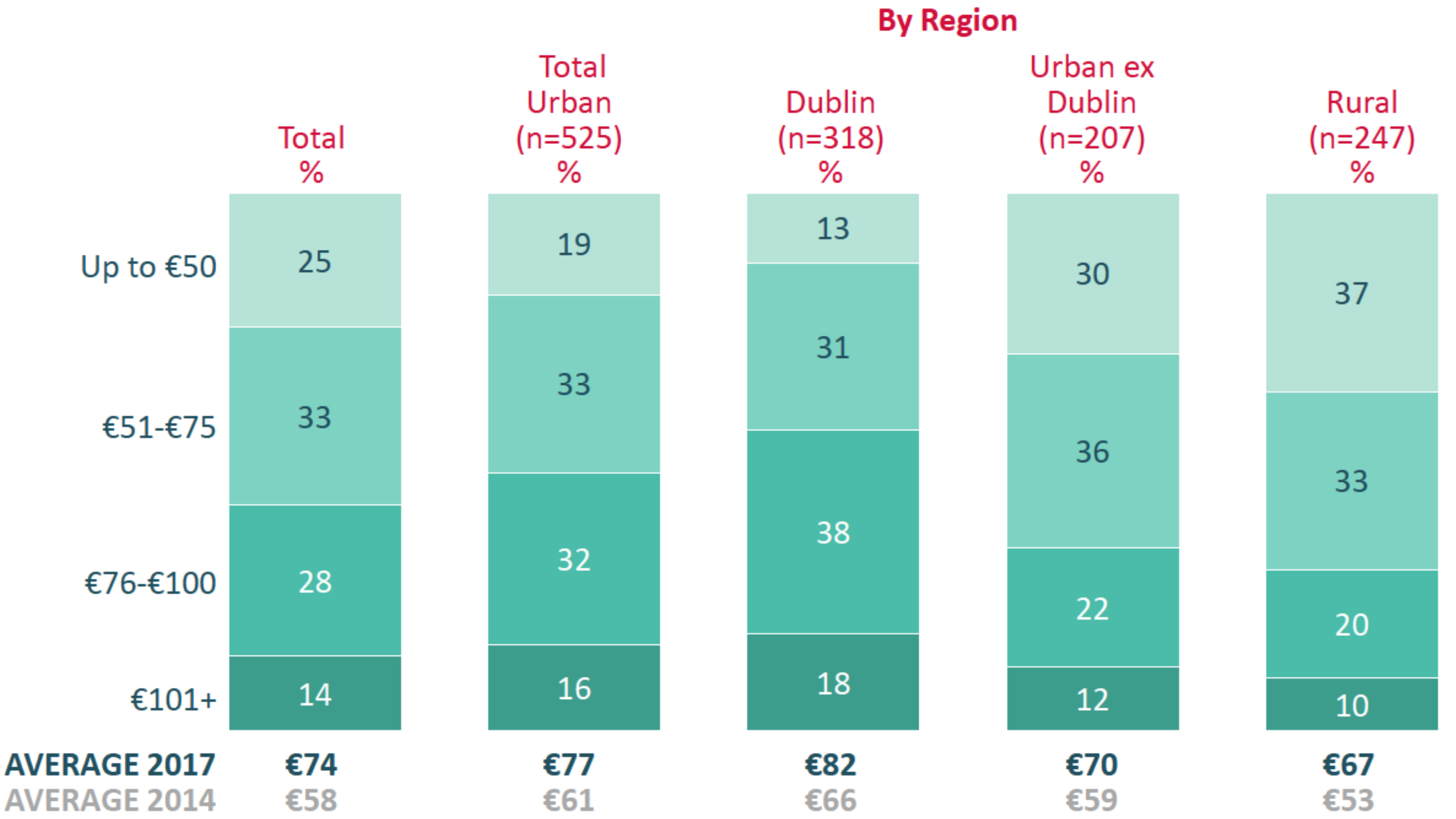
With 51% of respondents definitely knowing the cost of their monthly bundle, awareness is highest amongst Vodafone customers (60%) and Sky customers (58%).

REDC

Typical Broadband Bundle Spend Per Month By Region

(Base: All Definitely/Maybe Know Monthly Spend on Broadband Service, n=772)

Q.18 How much do you and your household typically pay for this bundle service per month (excluding any promotional/introductory offers)?



Note: Averages refer to average spend per household and are rounded to nearest Euro

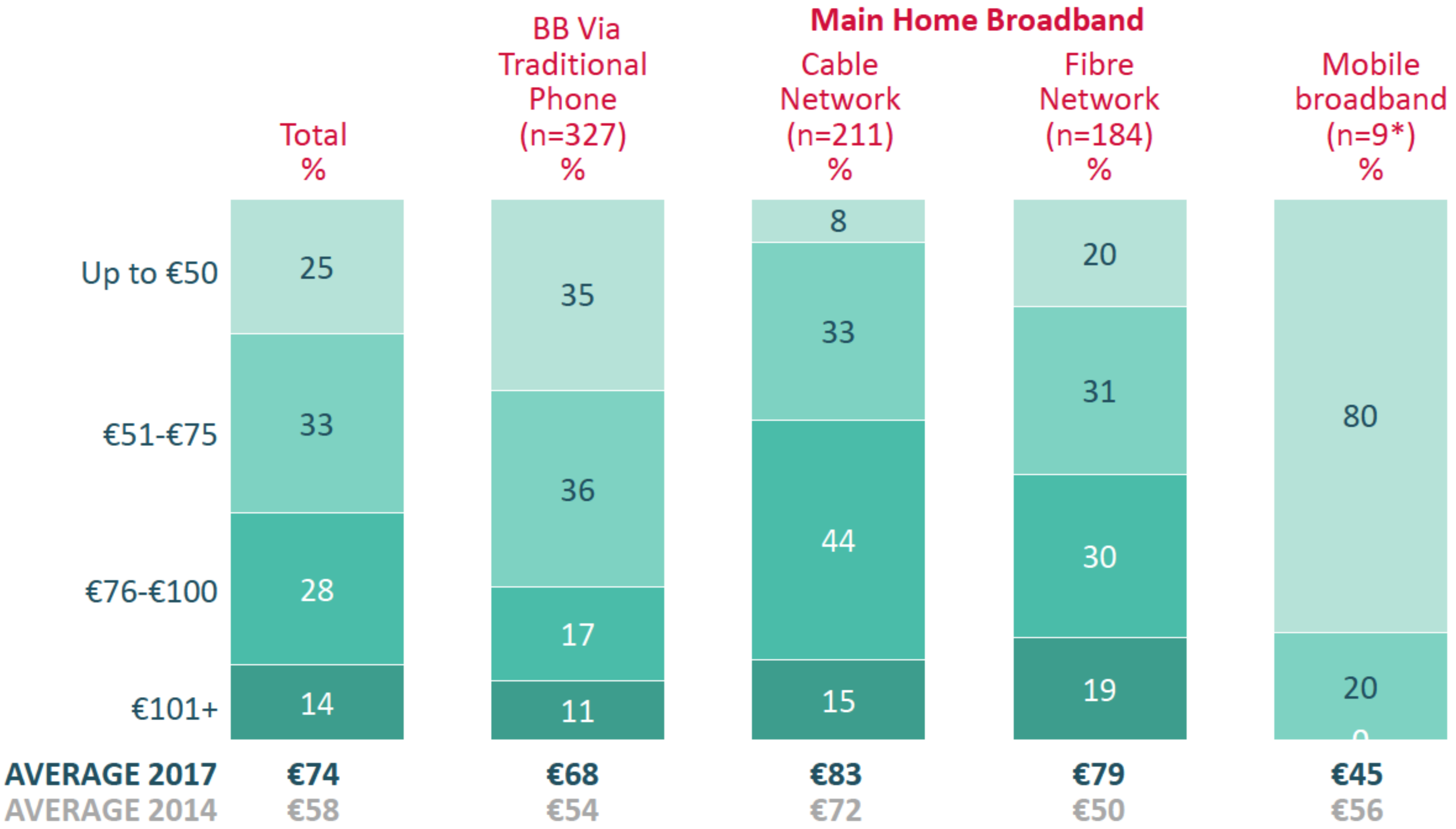
NOTE: this refers to overall spend on bundle per month, regardless of the bundle type.

According to the survey the average spend for bundle service per month is €74, growing to €82 amongst Dublin residents.

Typical Broadband Bundle Spend Per Month - Platform

(Base: All Definitely/Maybe Know Monthly Spend on Broadband Service, n=772)

Q.18 How much do you and your household typically pay for this bundle service per month (excluding any promotional/introductory offers)?



Note: Averages refer to average spend per household and are rounded to nearest Euro

*Caution: Small Base Size

NOTE: this refers to overall spend on bundle per month, regardless of the bundle type.

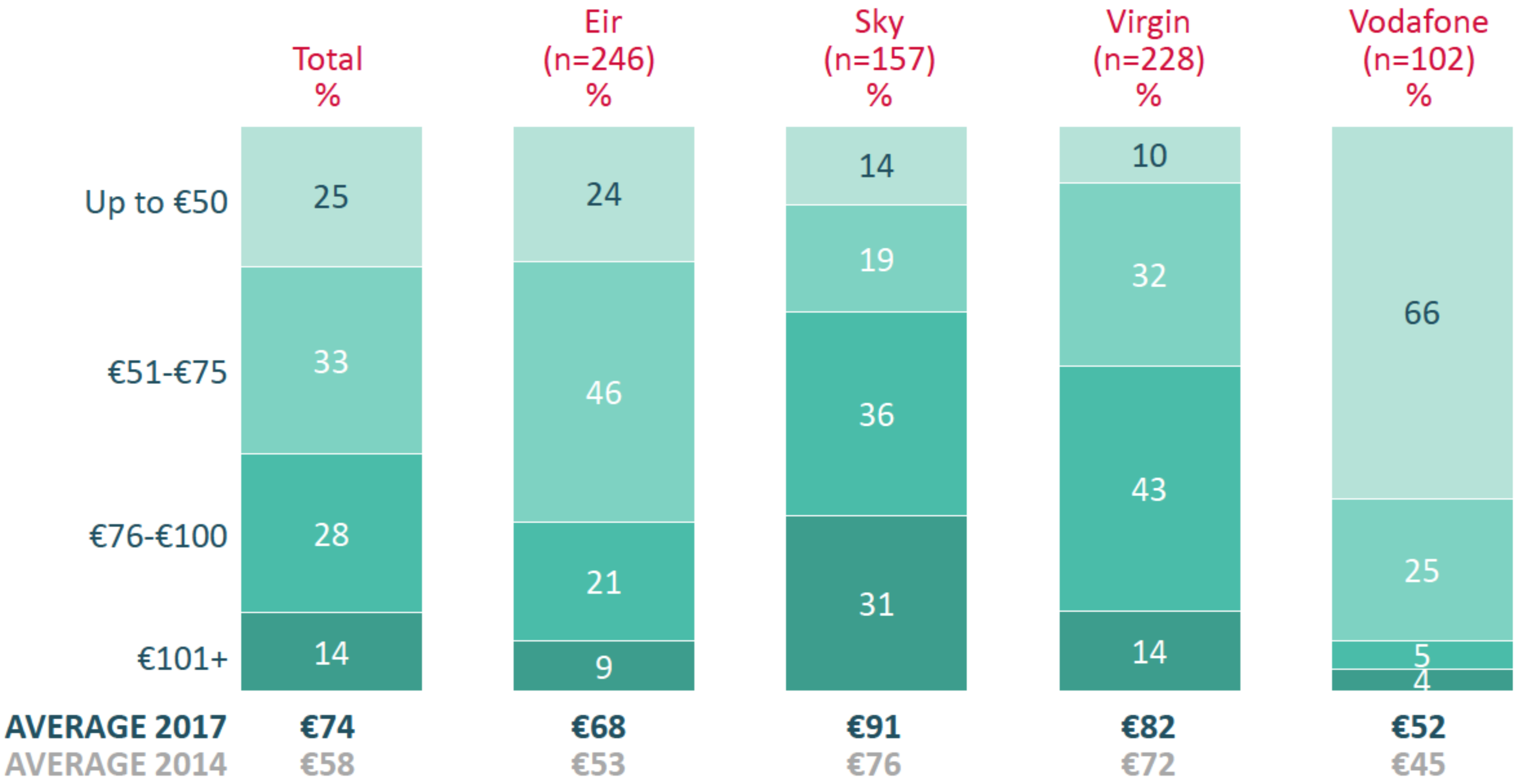
The Highest average broadband bundle spend per month is amongst Cable Network users (€83).

Typical Broadband Bundle Spend Per Month - Supplier

(Base: All Definitely/Maybe Know Monthly Spend on Broadband Service, n=772)

Q.18 How much do you and your household typically pay for this bundle service per month (excluding any promotional/introductory offers)?

Main Home Broadband Supplier



Note: Averages refer to average spend per household and are rounded to nearest Euro

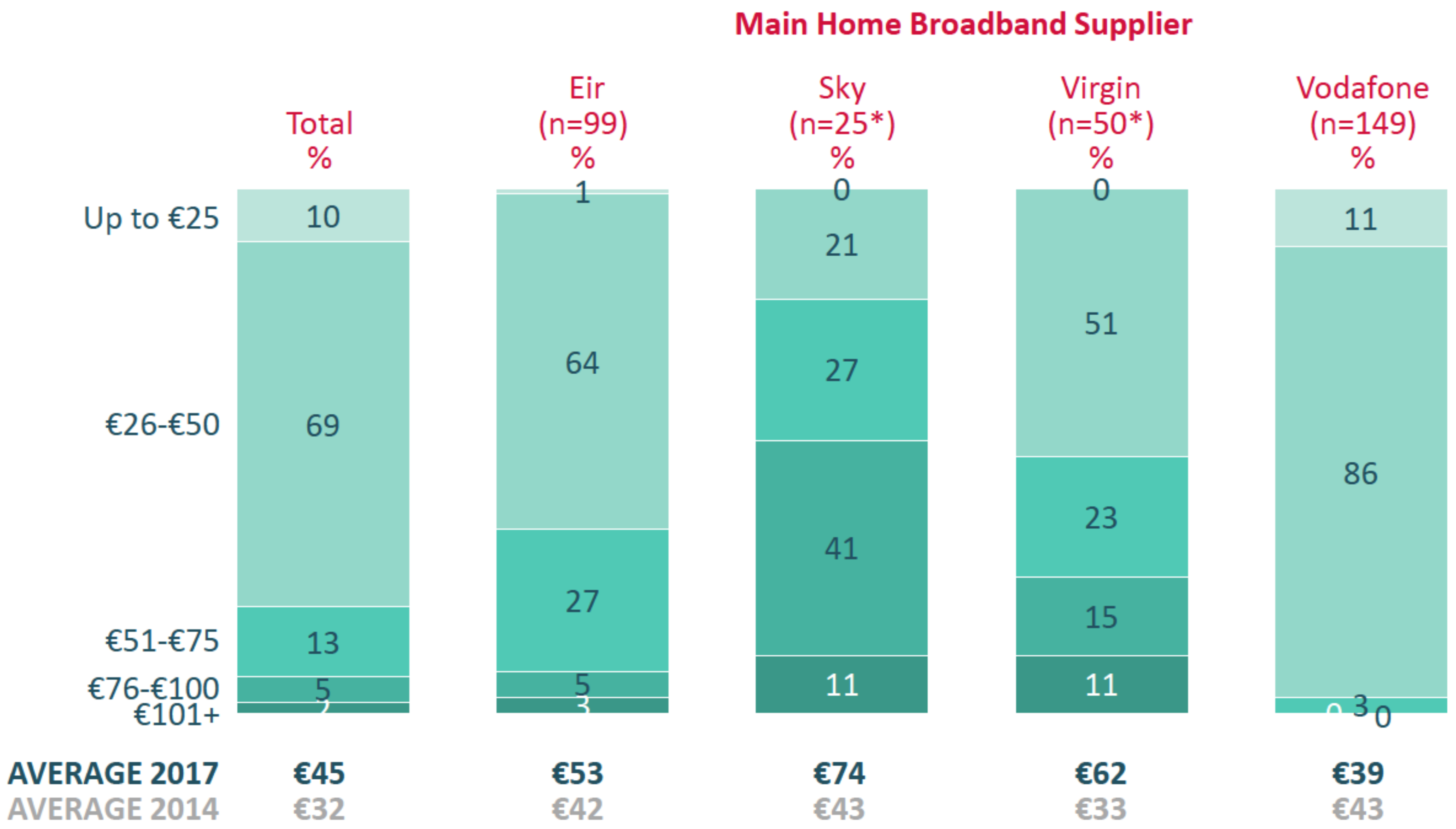
NOTE: this refers to overall spend on bundle per month, regardless of the bundle type.

Sky bundle owners on average spend €91 per month on their bundle according to the results from this survey.

Typical Broadband Spend Per Month – (Non Bundle)

(Base : All Definitely/Maybe Know Monthly Cost Of Broadband Service Non Bundle, n=453)

Q.23 How much do you and your household typically pay for broadband per month (excluding any promotional/introductory offers)?



*Caution: Small Base Size

Average claimed monthly spend for non-bundled broadband is lowest for Vodafone customers (€39).

REDC

Most Important Aspect of Service within Broadband Bundles

(Base: All Bundle Owners Who Know Bundle Type, n=963)

Q.19 Which service in the bundle/package you subscribe to is most important to you and your household?

	Total %	2014 (n=966) %	BB, Home, Mobile Ph (84) %	BB+Home Ph + TV (n=397) %	BB, Hone Ph, TV & Mobile (n=32*) %	BB+TV (n=131) %	BB + Mobile Phone (n=24*) %	BB, Home Ph (295) %
			Existing Bundle Type					
Broadband	69	63	56	63	50	70	54	82
TV	18	16	0	33	30	26	0	0
Home Phone	7	16	9	3	4	0	0	14
Mobile Phone	4	4	32	0	13	0	42	0

*Caution: Small Base Size

82% of those on a Broadband & Home Phone bundle believe that their broadband service is the most important part of their bundle. It is important to note that all bundle owners have broadband in their bundle while they may not necessarily have a Mobile Phone, TV or Home Phone as part of their bundle.

REDC

Most Important Aspect of Service within Broadband Bundles

(Base: All Bundle Owners Who Know Bundle Type, n=963)

Q.19 Which service in the bundle/package you subscribe to is most important to you and your household?

	Total %	2014 (n=966) %	Total Urban (n=654) %	Total Dublin (n=405) %	Total Urban Excl. Dublin (n=249) %	Rural (n=309) %
Broadband	69	63	67	69	63	72
TV	18	16	23	24	20	7
Home Phone	7	16	4	4	6	12
Mobile Phone	4	4	4	1	8	6

69% of bundle owners feel that their broadband service is the most important aspect of their bundle. It is important to note that all bundle owners have broadband in their bundle while they may not necessarily have a Mobile Phone, TV or Home Phone as part of their bundle.

Most Important Aspect of Service within Broadband Bundles

(Base: All Bundle Owners Who Know Bundle Type, n=963)

Q.19 Which service in the bundle/package you subscribe to is most important to you and your household?

	Total %	2014 (n=966) %	Eir (n=315) %	Sky (n=188) %	Virgin Media (n=296) %	Vodafone (n=121) %
Broadband	69	63	68	69	64	79
TV	18	16	9	25	30	3
Home Phone	7	16	12	2	3	5
Mobile Phone	4	4	7	1	1	7

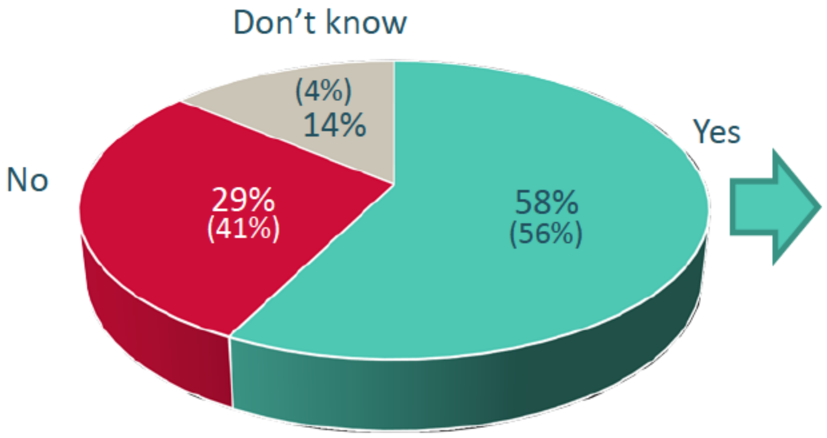
79% of Vodafone bundle owners claim that broadband is the most important service in their bundle. It is important to note that all bundle owners have broadband in their bundle while they may not necessarily have a Mobile Phone, TV or Home Phone as part of their bundle.

Currently in Contract with Broadband Service Provider?

(Base: All Respondents With Broadband Access n=1,616)

Q.20 Thinking about your main broadband service are you and your household currently tied into a contract with your service provider?

Total



Main Broadband Type

	BB via Traditional Phone (n=755) %	Cable Network (n=67*) %	Fibre Network (n=272) %	Mobile broadband (n=116) %	Other BB (n=123) %
Yes	66	41	64	50	58
No	22	43	25	33	33
Don't know	12	16	11	17	9

Main Supplier

	Eir (n=471) %	Sky (n=227) %	Virgin Media (n=365) %	Vodafone (n=323) %
Yes	61	66	46	67
No	25	25	38	22
Don't Know	14	9	16	11

( ) Figures in brackets denote 2014 data

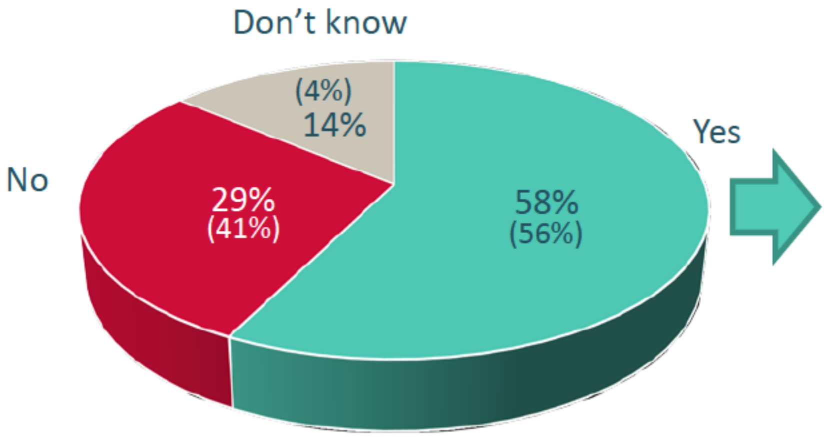
58% of broadband users confirmed that they are tied into a contract with their service provider, rising to 66% amongst those using fixed broadband via a traditional fixed telephone line.

Currently in Contract with Broadband Service Provider?

(Base: All Respondents With Broadband Access n=1,616)

Q.20 Thinking about your main broadband service are you and your household currently tied into a contract with your service provider?

Total



Main Supplier

	Eir (n=471) %	Sky (n=227) %	Virgin Media (n=365) %	Vodafone (n=323) %
Yes	61	66	46	67
No	25	25	38	22
Don't Know	14	9	16	11

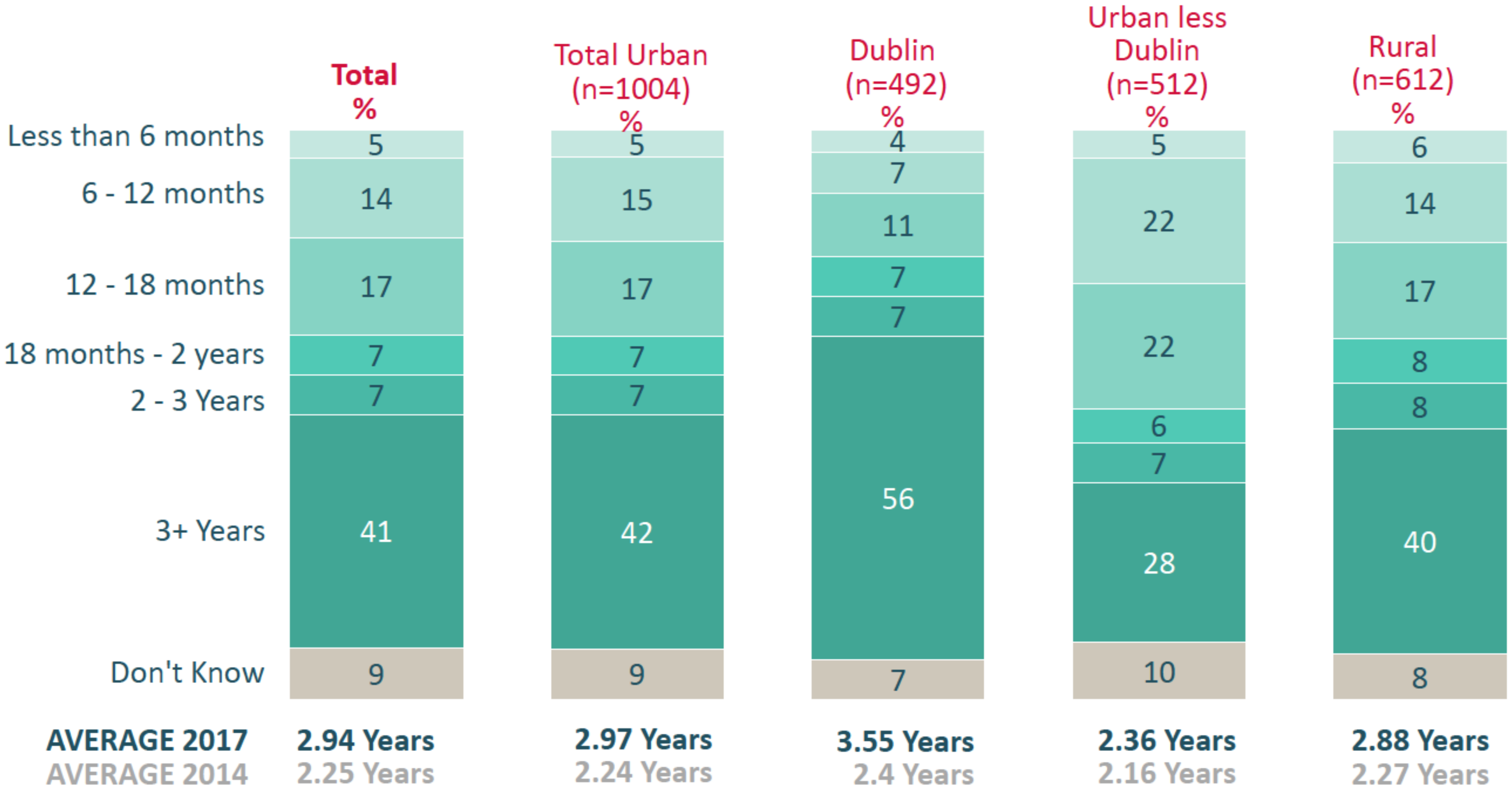
( ) Figures in brackets denote 2014 data

Based on the survey results Virgin Media have the lowest in contract rate at 46%.

Length Of Time With Current Broadband Supplier

(Base: All Respondents With Broadband Access n=1,616)

Q.21 How long have you and your household been with your current main broadband supplier for?



Note: Averages refer to average tenure per household

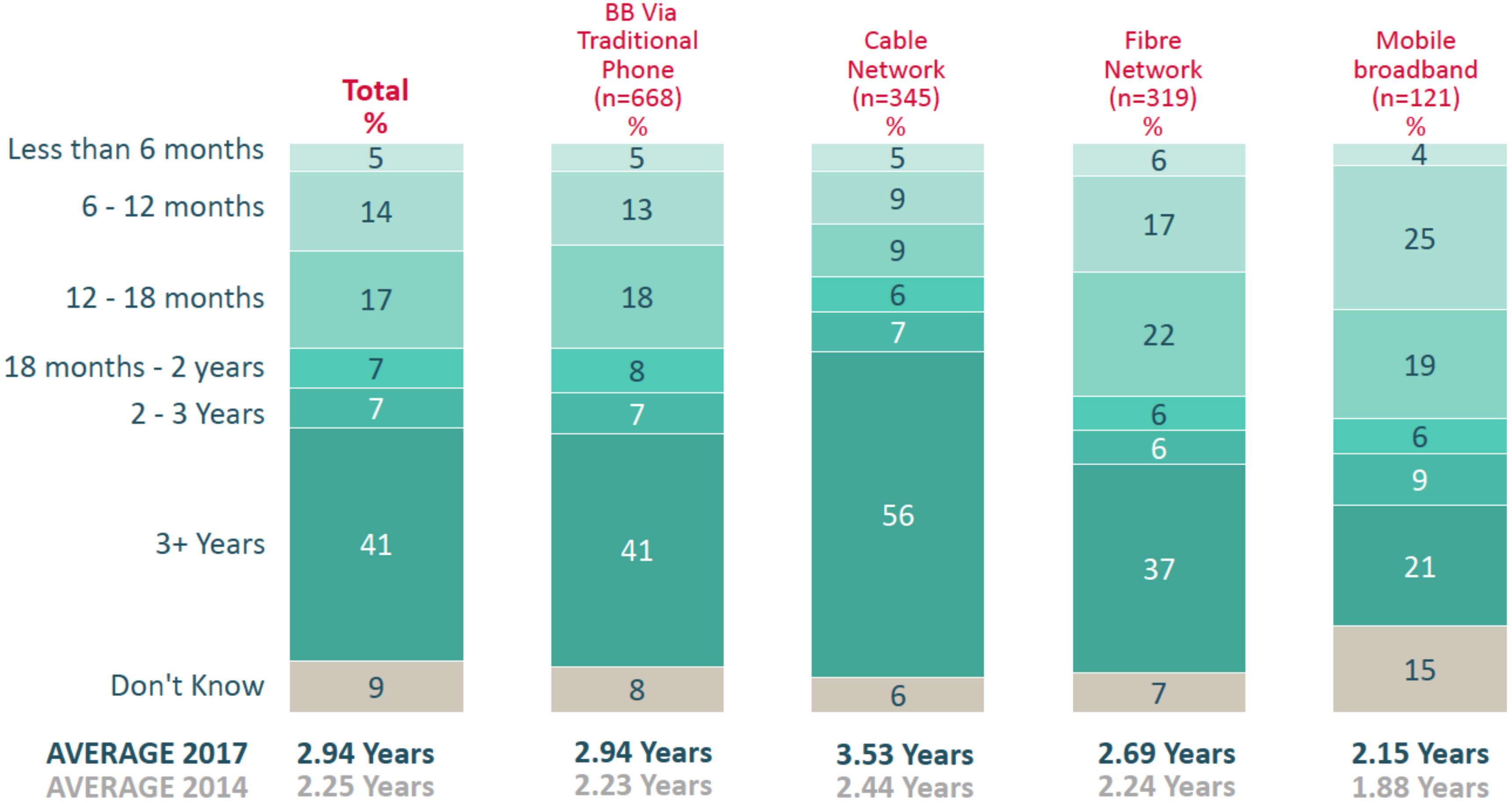
The average length of time with current broadband supplier nationally is 2.94 years, growing to 3.55 amongst Dublin residents.

REDC

Length Of Time With Current Broadband Supplier

(Base: All Respondents With Broadband Access, n=1616)

Q.21 How long have you and your household been with your current main broadband supplier for?



Note: Averages refer to average tenure per household

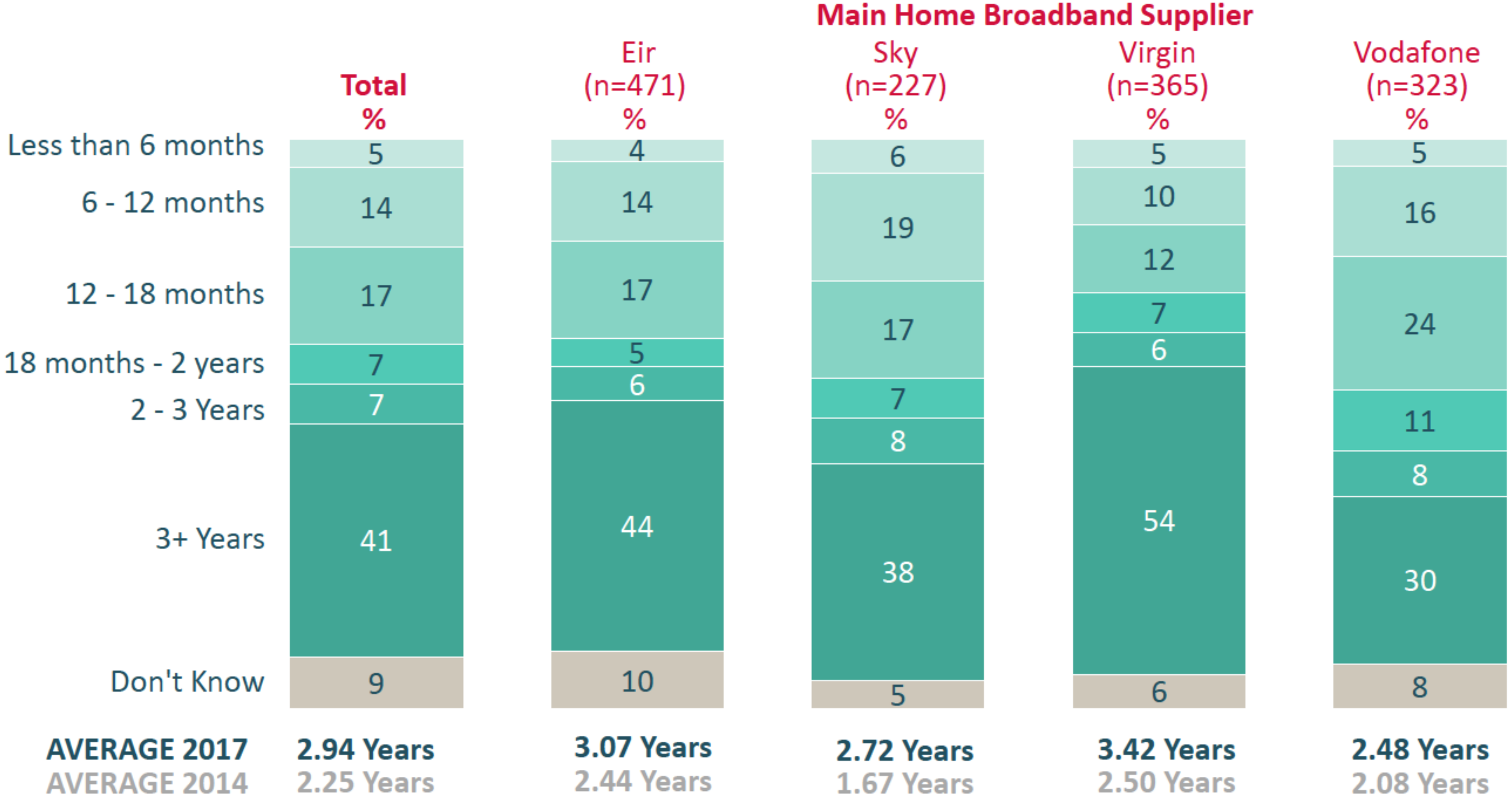
The average length of time with current broadband supplier across all platforms nationally is 2.94 years. It increases to 3.53 years for those who connect via a cable network.

REDC

Length Of Time With Current Broadband Supplier

(Base: All Respondents With Broadband Access, n=1616)

Q.21 How long have you and your household been with your current main broadband supplier for?



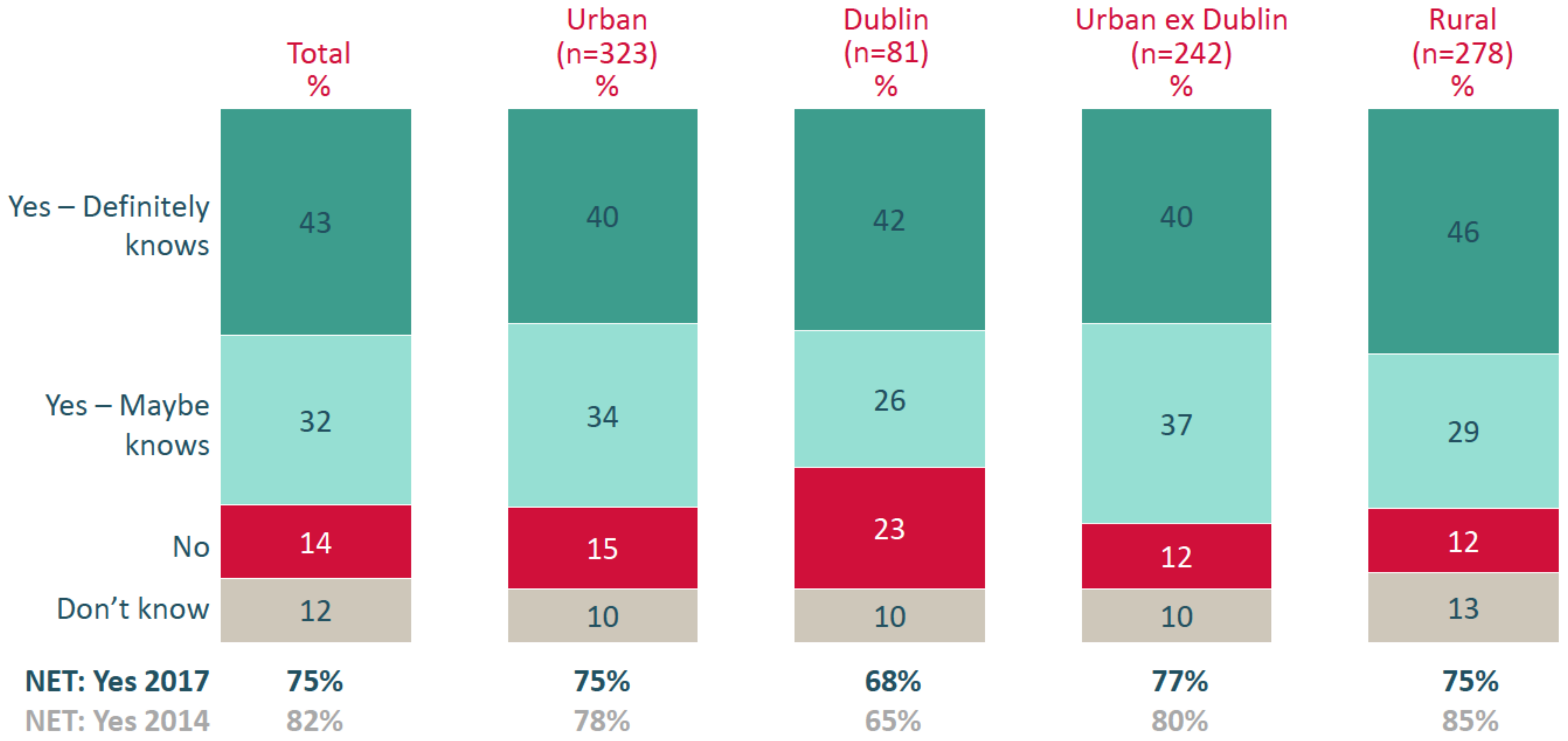
Note: Averages refer to average tenure per household

The average length of time with current broadband supplier is 2.94 years. Longest for Virgin Media (3.42 years).

Knowledge of Broadband Cost (Non Bundle)

(Base: All With Broadband Access Non-Bundle, n=601)

Q.22 Do you know how much you and your household pay for your broadband service on a monthly basis?

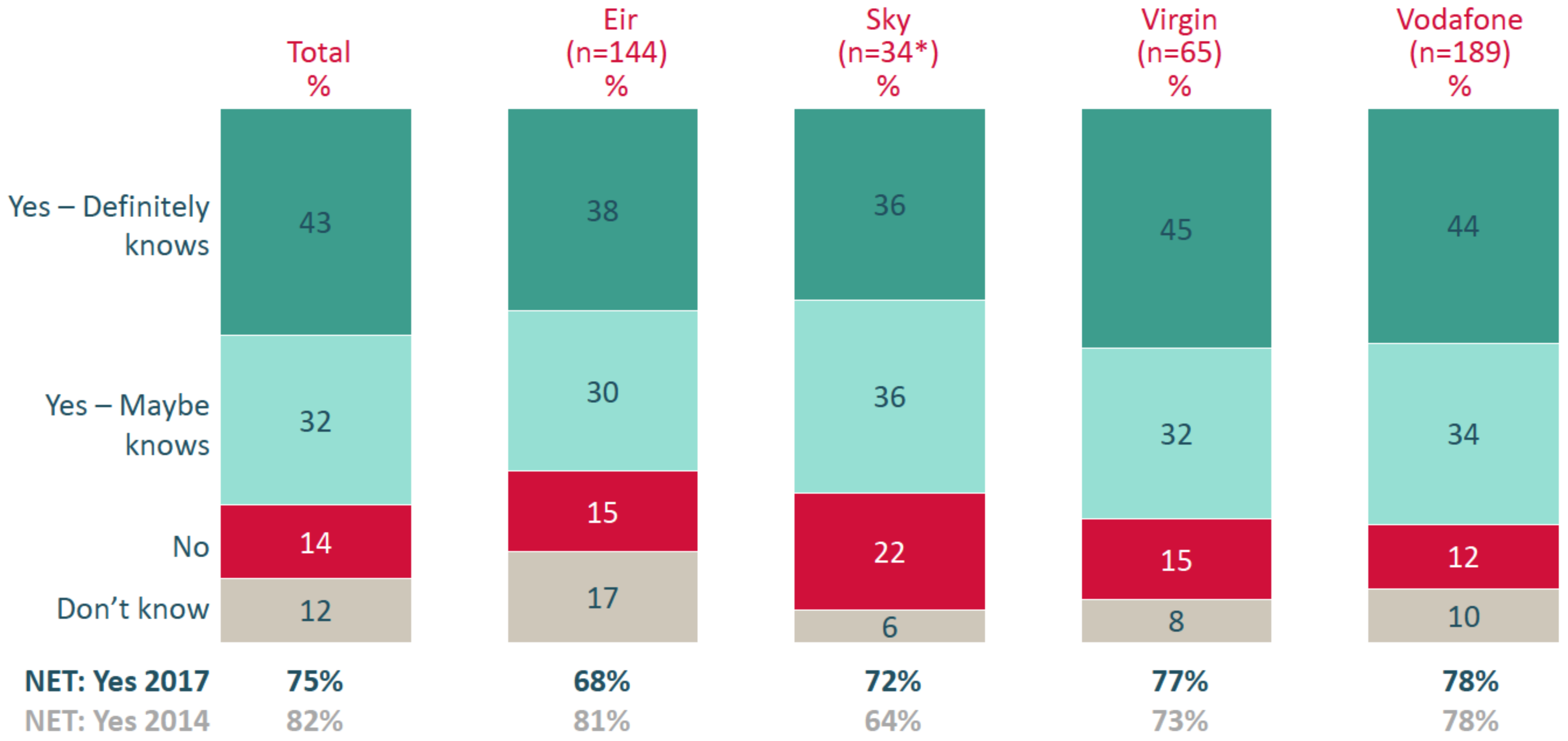


43% of the non bundle household's definitely know the cost of their broadband monthly subscription. A higher proportion of respondents in rural areas are aware of the monthly cost of broadband. Awareness appears to have reduced in recent years.

Knowledge of Broadband Cost (Non Bundle) by Supplier

(Base: All With Broadband Access Non-Bundle, n=601)

Q.22 Do you know how much you and your household pay for your broadband service on a monthly basis?



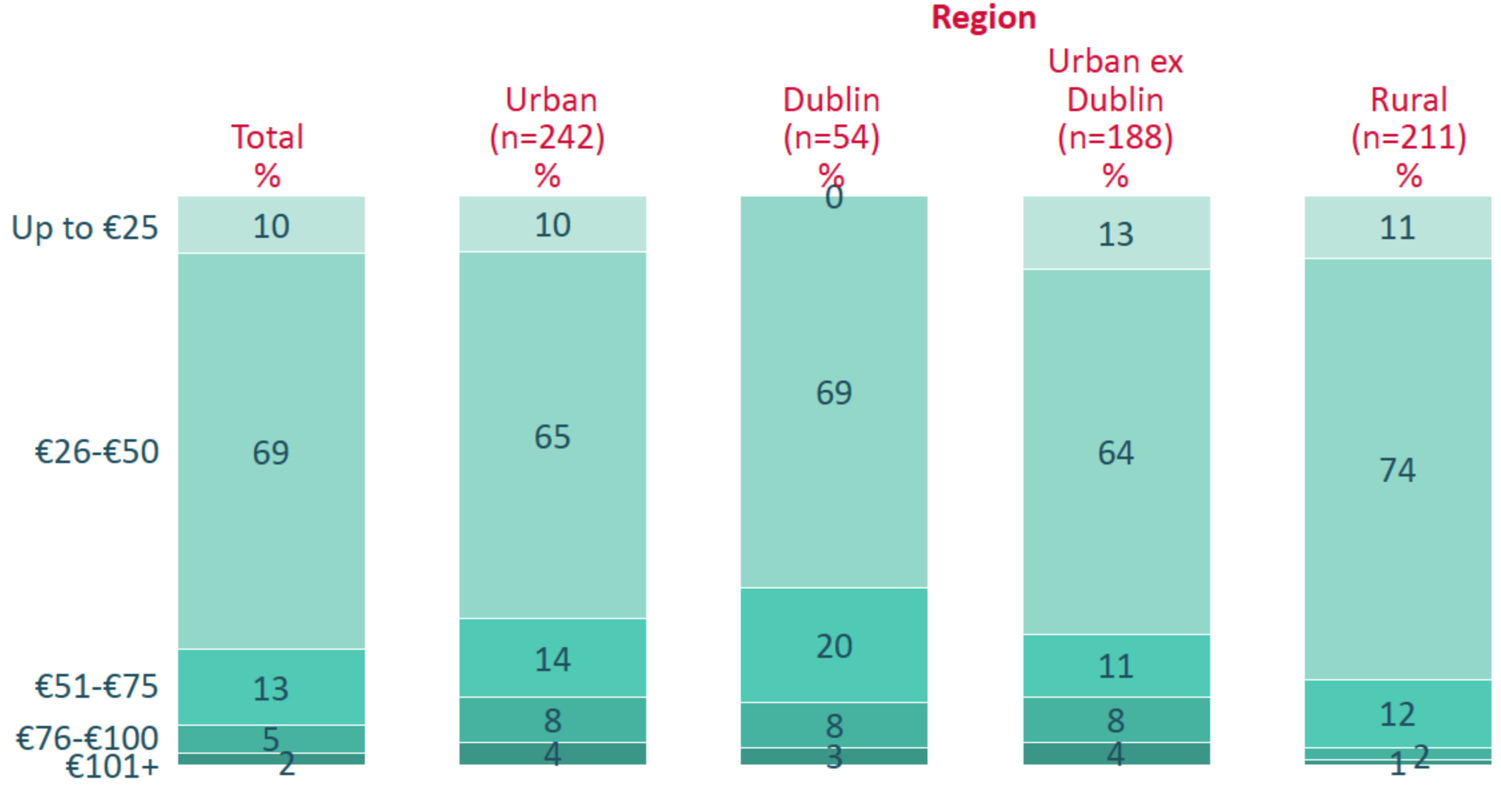
*Caution: Small Base Size

The level of those stating that they 'Definitely Know' the cost of their broadband service is lower amongst Eir customers (38%).

Typical Broadband Spend Per Month – (Non Bundle)

(Base : All Definitely/Maybe Know Monthly Cost Of Broadband Service Non Bundle, n=453)

Q.23 How much do you and your household typically pay for broadband per month (excluding any promotional/introductory offers)?



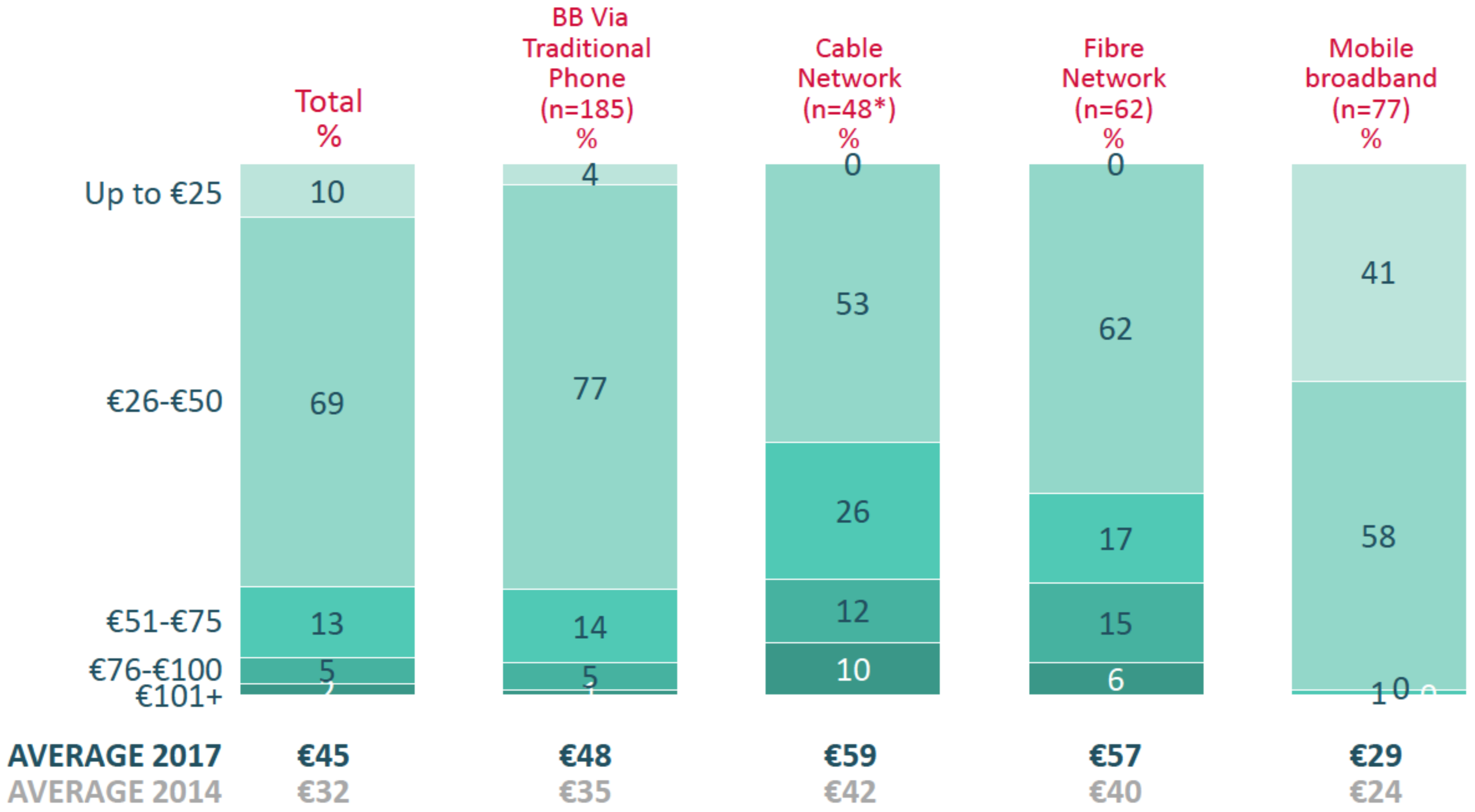
	Total	Urban	Dublin	Urban ex Dublin	Rural
AVERAGE 2017	**€45**	**€49**	**€52**	**€48**	**€42**
AVERAGE 2014	€32	€33	€34	€32	€31

Average cost of non-bundled (i.e. standalone) broadband is €45, rising to €52 in Dublin.

Typical Broadband Spend Per Month – (Non Bundle)

(Base : All Definitely/Maybe Know Monthly Cost Of Broadband Service Non Bundle, n=453)

Q.23 How much do you and your household typically pay for broadband per month (excluding any promotional/introductory offers)?



*Caution: Small Base Size

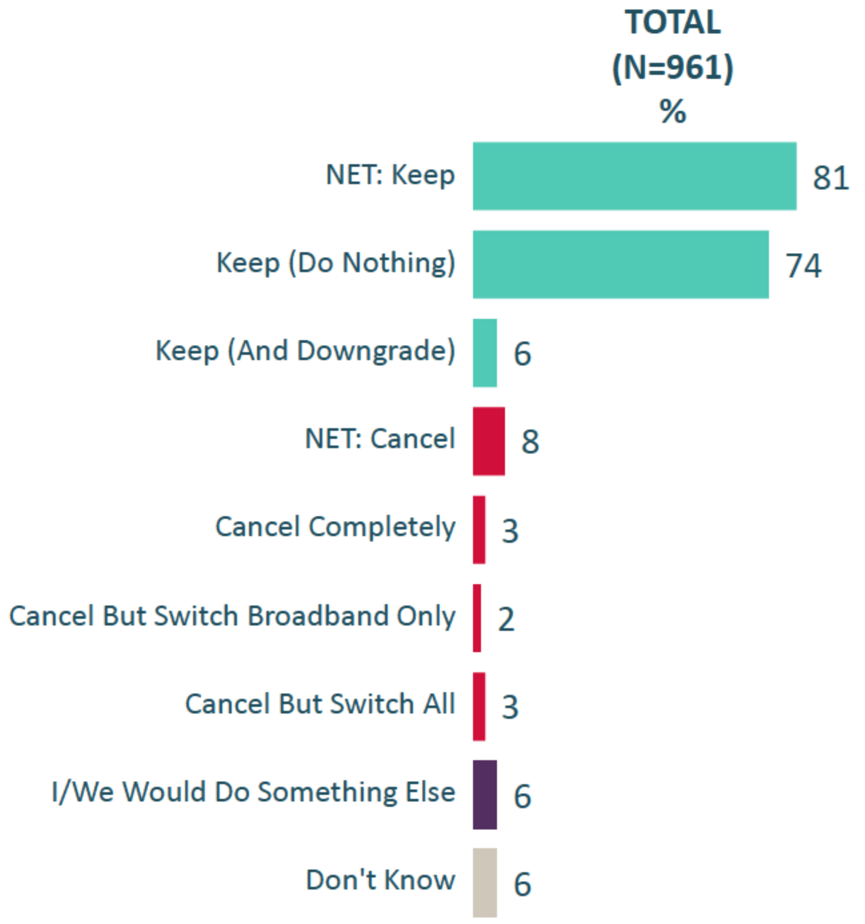
Average broadband spend per month unbundled is lowest for Mobile Broadband users (€29)

SSNIP
(with broadband in a Bundle)

Action Taken If Price Broadband Increase By €2 in Bundle

(Base : All Bundle Owners Aware Of Broadband Access Type, n=961)

Q.25 Which of the following would best describe what you and your household would be most likely to do in response to this hypothetical €2 price increase of your broadband service?



	Total Urban (n=657) %	Total Dublin (n=407) %	Total Urban ex Dublin (n=250) %	Rural (n=304) %
NET: Keep	79	82	74	85
Keep (Do Nothing)	73	78	65	76
Keep (And Downgrade)	5	3	9	8
NET: Cancel	8	4	15	9
Cancel Completely	3	1	6	3
Cancel But Switch Broadband Only	1	*	3	2
Cancel But Switch All	4	2	6	3
I/We Would Do Something Else	8	11	2	1
Don't Know	6	4	9	5

81% of bundle owners surveyed claim that they are likely to keep their current broadband access type in response to a hypothetical €2 per month price increase to their broadband costs.

REDC

Action Taken If Price Broadband Increase By €2 in Bundle

(Base : All Bundle Owners Aware Of Broadband Access Type, n=961)

Q.25 Which of the following would best describe what you and your household would be most likely to do in response to this hypothetical €2 price increase of your broadband service?

	TOTAL (N=961) %	Traditional Phone (n=415) %	Cable Network (n=277) %	Fibre Network (n=223) %	Mobile broadband (n=9*) %
NET: Keep	81	83	80	78	91
Keep (Do Nothing)	74	75	76	74	91
Keep (And Downgrade)	6	8	4	4	0
NET: Cancel	8	10	4	8	9
Cancel Completely	3	4	*	3	0
Cancel But Switch Broadband Only	2	2	1	2	9
Cancel But Switch All	3	4	3	3	0
I/We Would Do Something Else	6	2	10	8	0
Don't Know	6	5	6	7	0

*Caution: Small Base Size

8% of bundle owners in this survey would respond to a hypothetical €2 per month price increase to their broadband service by cancelling their current broadband service.

REDC

Action Taken If Price Broadband Increase By €2 in Bundle

(Base : All Bundle Owners Aware Of Broadband Access Type, n=961)

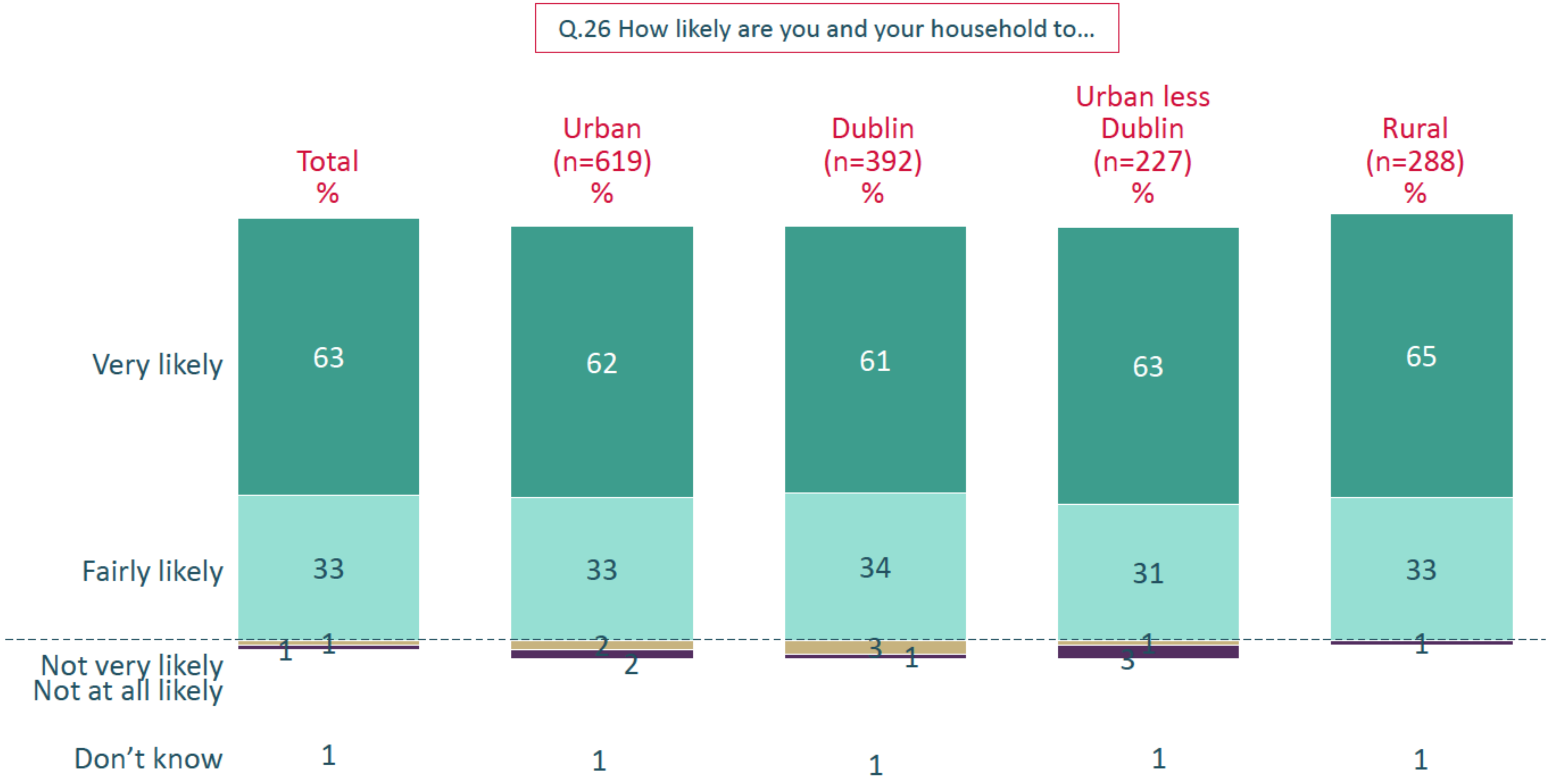
Q.25 Which of the following would best describe what you and your household would be most likely to do in response to this hypothetical €2 price increase of your broadband service?

	TOTAL (N=961) %	Eir (n=315) %	Sky (n=184) %	Virgin Media (n=297) %	Vodafone (n=120) %
NET: Keep	81	79	84	81	75
Keep (Do Nothing)	74	73	77	76	67
Keep (And Downgrade)	6	6	7	5	8
NET: Cancel	8	9	9	3	17
Cancel Completely	3	3	3	1	8
Cancel But Switch Broadband Only	2	2	2	*	2
Cancel But Switch All	3	4	4	2	6
I/We Would Do Something Else	6	5	4	10	2
Don't Know	6	7	3	6	7

Amongst bundle owners in this survey, Sky customers are most likely to keep their current broadband access type if a hypothetical €2 per month price increase on their broadband service were to be introduced (84%).

Likelihood of Going Through with Decision (Bundle)

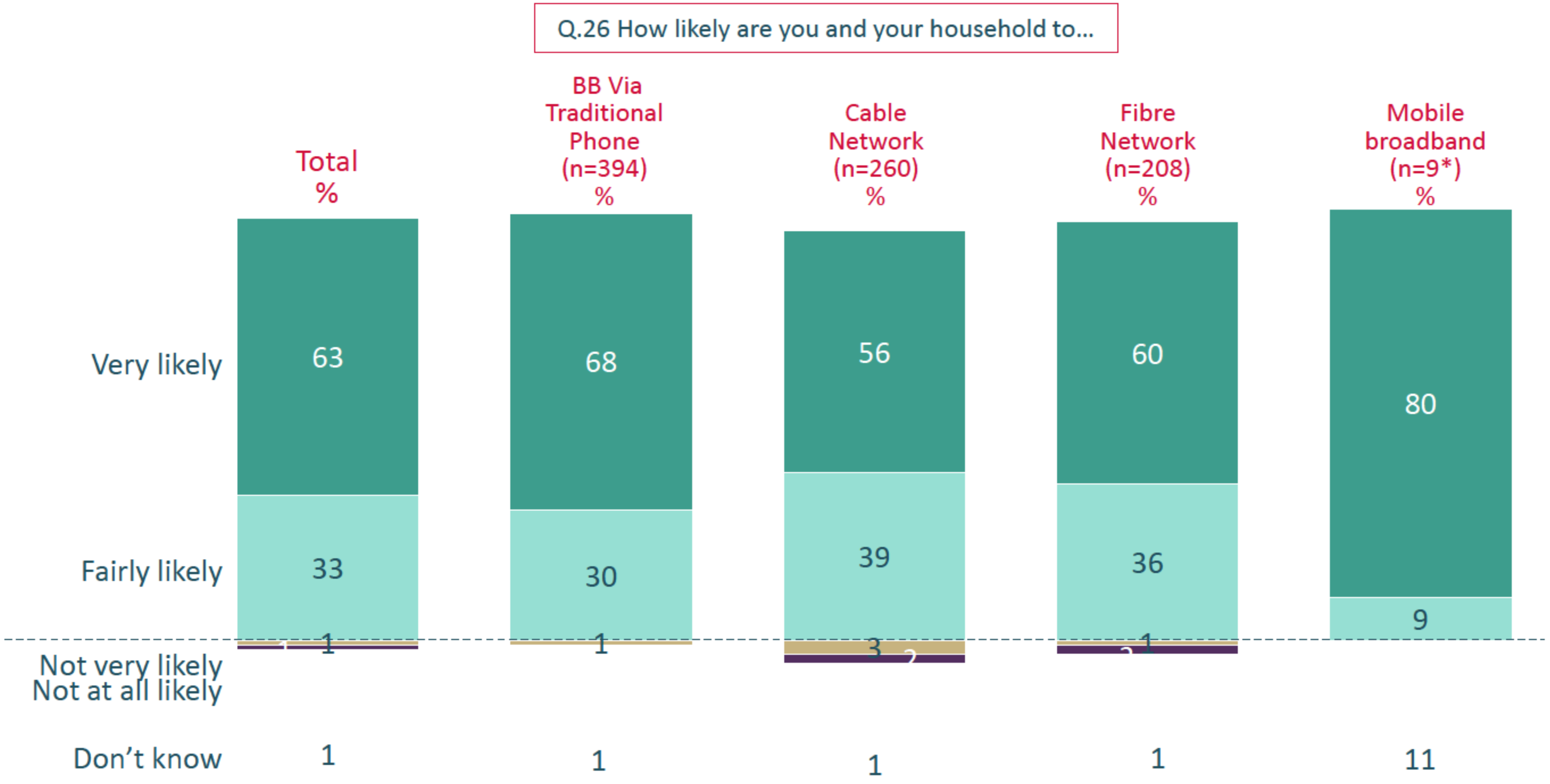
(Base : All Bundle Owners Making Decision In Response to Price Increase (ex don't know from previous question), n=907)



Amongst bundle owners making a decision in response to a hypothetical €2 monthly price increase to their broadband service, 63% say they would be very likely to go through with this decision.

Likelihood of Going Through with Decision (Bundle)

(Base : All Bundle Owners Making Decision In Response to Price Increase, n=907)



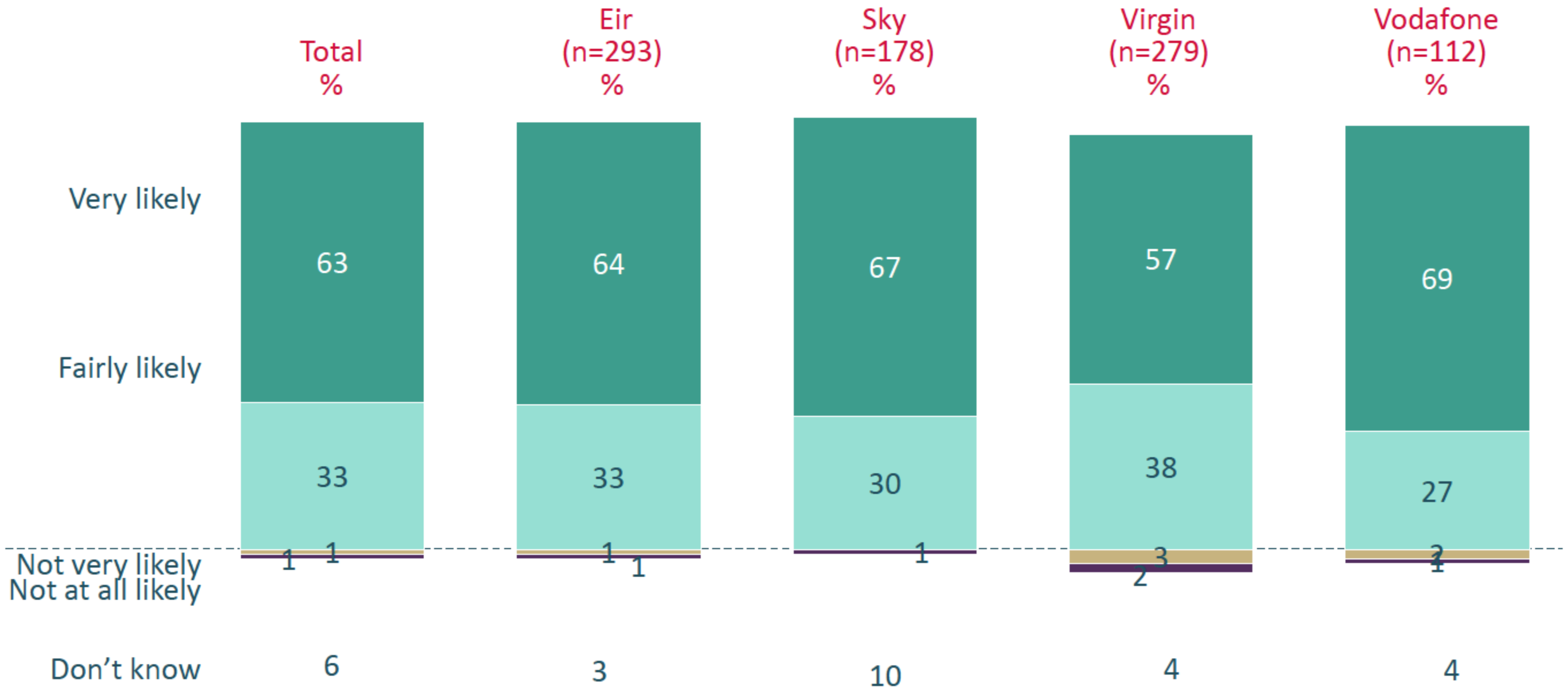
*Caution: Small Base Size

The majority of bundle owners making a decision in response to a hypothetical €2 monthly price increase say they would be likely to go through with this decision, with little difference by access type.

Likelihood of Going Through with Decision (Bundle)

(Base : All Bundle Owners Making Decision In Response to Price Increase, n=907)

Q.26 How likely are you and your household to…



Amongst bundle owners making a decision in response to a hypothetical €2 monthly price increase to their broadband service, there are lower levels of those saying they are ‘Very Likely’ to go through with their decision amongst those on Virgin Media (57%).

Broadband Type Likely Switch To

(Base: All Bundle Owners Likely to Cancel/Switch Broadband, n=50*)

Q.27 Which type of broadband service would you and your household be most likely to switch to?

	Total %	Total Urban (n=32*) %	Dublin (n=10*) %	Total Urban less Dublin (n=22*) %	Total Rural (n=18*) %
Broadband service provided by a Fibre supplier	25	21	21	22	33
Continue with the same type of service offered by a different provider	18	16	18	15	21
Broadband service provided over a traditional fixed telephone line	10	16	32	9	0
Broadband service provided by a TV cable supplier	8	6	10	4	11
Solely using my mobile phone for internet access instead (3G/4G data package)	6	3	9	0	6
A Mobile Broadband solution	4	6	10	4	0
Broadband provided by a Satellite network	2	3	0	4	0
Fixed wireless connection, often provided via an aerial/antennae attached to your home	2	3	0	5	0
I/We Would do something else	27	26	0	38	29

*Caution: Small Base Size

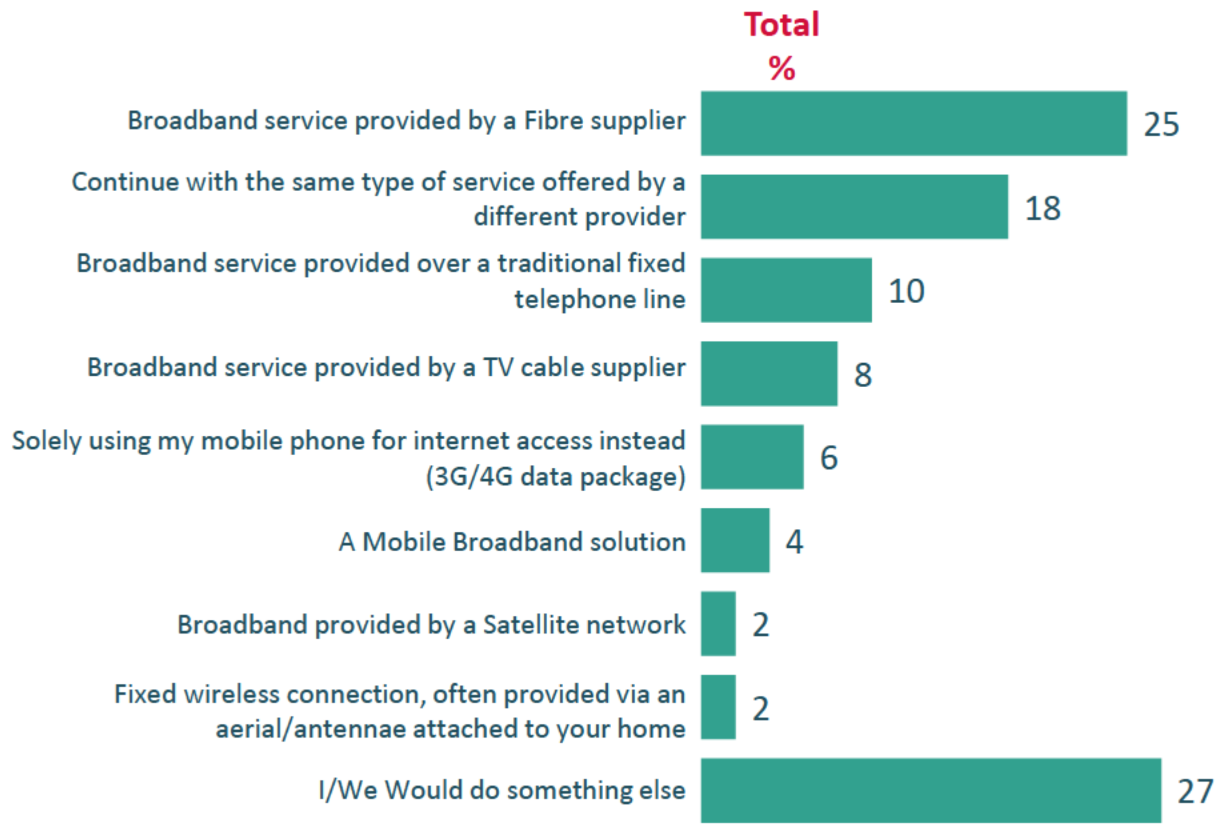
Amongst bundle owners claiming that they would be likely to cancel/switch their broadband in the event of a hypothetical €2 per month price increase, 25% say they would switch to a broadband service provided by a fibre supplier. It is important to note that this is based on a small sample size (n=50).

REDC

Broadband Type Likely Switch To

(Base: All Bundle Owners Likely to Cancel/Switch Broadband, n=50*)

Q.27 Which type of broadband service would you and your household be most likely to switch to?



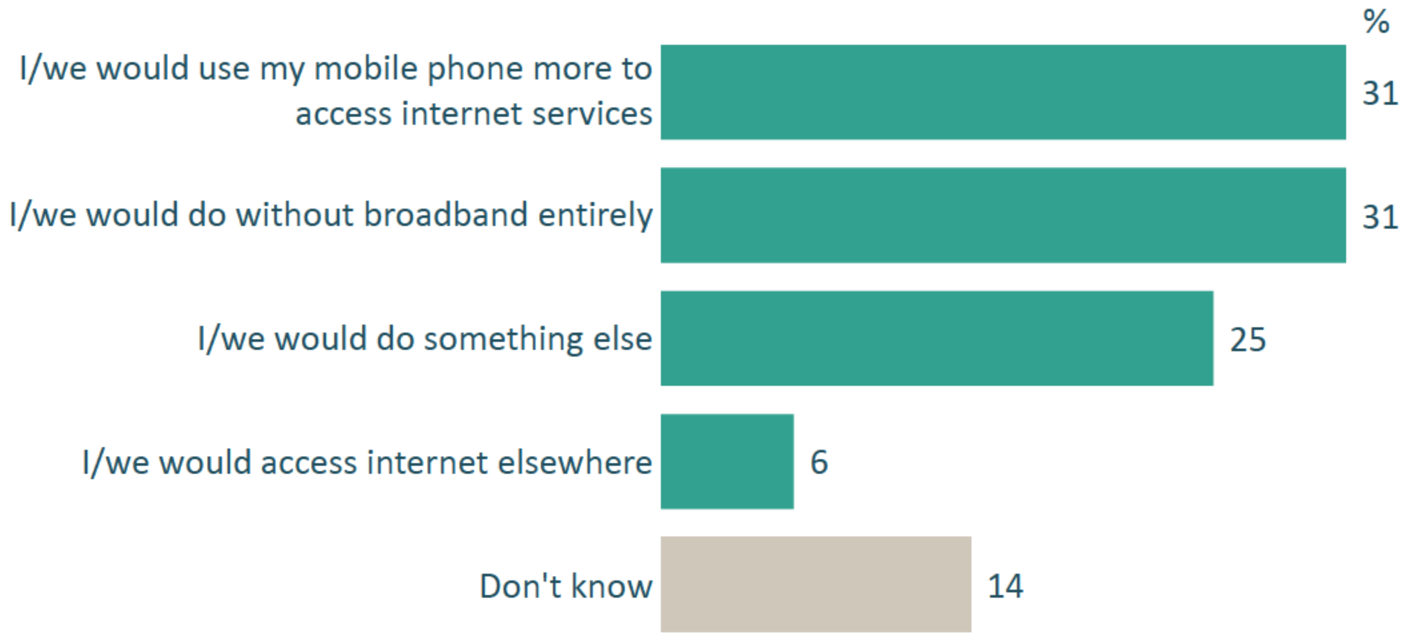
*Caution: Small Base Size

Amongst bundle owners claiming that they would be likely to cancel/switch their broadband in the event of a hypothetical €2 per month price increase, 25% say they would switch to a broadband service provided by a fibre supplier. It is important to note that this is based on a small sample size (n=50).

Likely Alternative For Those That Would Cancel Broadband – Bundle Owners

(Base: All Bundle Owners Likely to Cancel Completely; n=28*)

Q.28 You have just said that you would cancel your household's broadband subscription, what would you do instead?



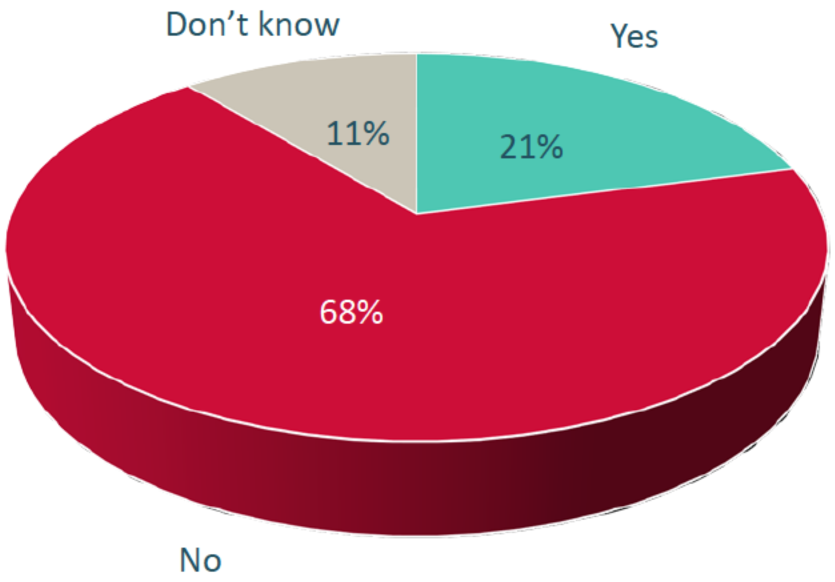
*Caution: Small Base Size

Amongst bundle owners that claim they would be likely to cancel their broadband completely in response to a hypothetical €2 per month price increase to their service, 31% say they would use their mobile phone more to access the internet, 31% say that they would do without broadband entirely.

Awareness If Broadband Type Is Available In Area – Bundle Owners

(Base: All Bundle Owners Likely to Switch Broadband; n=28*)

Q.29 You have just said that you would switch to broadband type… do you know if this access type is available in your area?



*Caution: Small Base Size

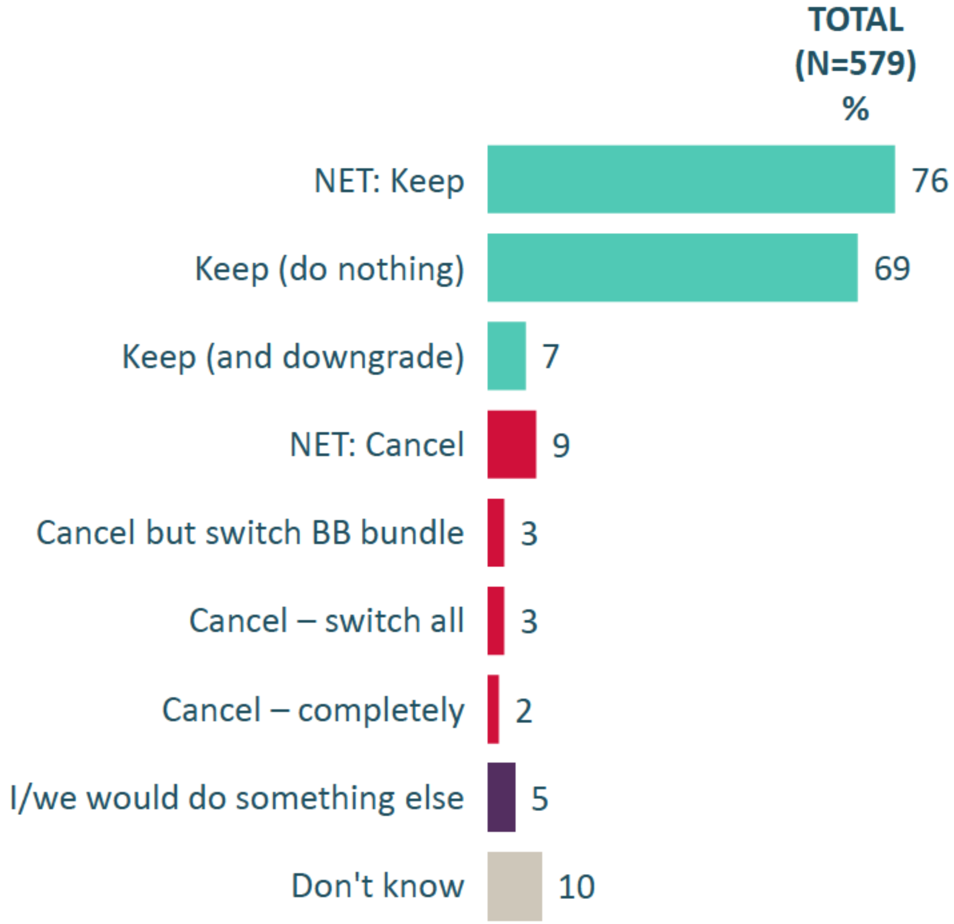
Amongst bundle owners claiming that they would be likely to switch their broadband in the event of a hypothetical €2 per month price increase, 68% do not know if the broadband type they have said they would switch to is available in their area, but due to the base size being so small, it is not possible to draw any firm conclusions on this.

SSNIP
(for standalone broadband i.e. not in a Bundle)

Action Taken If Price Broadband Increase By €2 – Non-Bundle

(Base: All non-bundle owners aware of broadband access type, n=579)

Q.30 Which of the following would best describe what you and your household would be most likely to do in response to this hypothetical €2 price increase of your broadband service?



	Eir (n=142) %	Sky (n=33*) %	Virgin (n=65) %	Vodafone (n=179) %
NET: Keep	80	71	66	75
Keep (do nothing)	71	58	62	69
Keep (and downgrade)	9	13	4	5
NET: Cancel	10	3	8	9
Cancel but switch BB bundle	5	0	3	3
Cancel – switch all	3	3	2	3
Cancel – completely	2	0	4	2
I/we would do something else	1	3	11	9
Don't know	9	23	15	7

*Caution: Small Base Size

80% of non-bundled Eir broadband customers say that they would keep their current broadband access type in the hypothetical event of a €2 monthly increase to their broadband costs.

REDC

Action Taken If Price Broadband Increase By €2 – Non-Bundle

(Base: All non-bundle owners aware of broadband access type, n=579)

Q.30 Which of the following would best describe what you and your household would be most likely to do in response to this hypothetical €2 price increase of your broadband service?

	TOTAL (N=579) %	Traditional Phone (n=240) %	Cable Network (n=64) %	Mobile Broadband (n=98) %	Fibre Network (n=92) %
NET: Keep	76	76	69	81	73
Keep (do nothing)	69	67	66	71	67
Keep (and downgrade)	7	9	3	11	6
NET: Cancel	9	9	8	5	7
Cancel but switch BB bundle	3	3	1	1	3
Cancel – switch all	3	4	3	1	2
Cancel – completely	2	2	4	3	1
I/we would do something else	5	7	10	2	3
Don't know	10	8	14	12	16

76% of non-bundle owners surveyed claim that they are likely to keep their current broadband access type in response to a hypothetical €2 per month price increase to their broadband costs, rising to 81% amongst Mobile Broadband owners.

REDC

Action Taken If Price Broadband Increase By €2 – Non-Bundle

(Base: All non-bundle owners aware of broadband access type, n=579)

Q.30 Which of the following would best describe what you and your household would be most likely to do in response to this hypothetical €2 price increase of your broadband service?

	TOTAL (N=579) %	Urban (n=314) %	Dublin (n=81) %	Urban less Dublin (n=233) %	Rural (n=265) %
NET: Keep	76	73	83	69	79
Keep (do nothing)	69	65	82	58	74
Keep (and downgrade)	7	8	1	11	6
NET: Cancel	9	9	9	9	8
Cancel but switch BB bundle	3	3	2	4	4
Cancel – switch all	3	3	1	4	3
Cancel – completely	2	3	6	2	2
I/we would do something else	5	7	7	7	3
Don't know	10	11	1	15	9

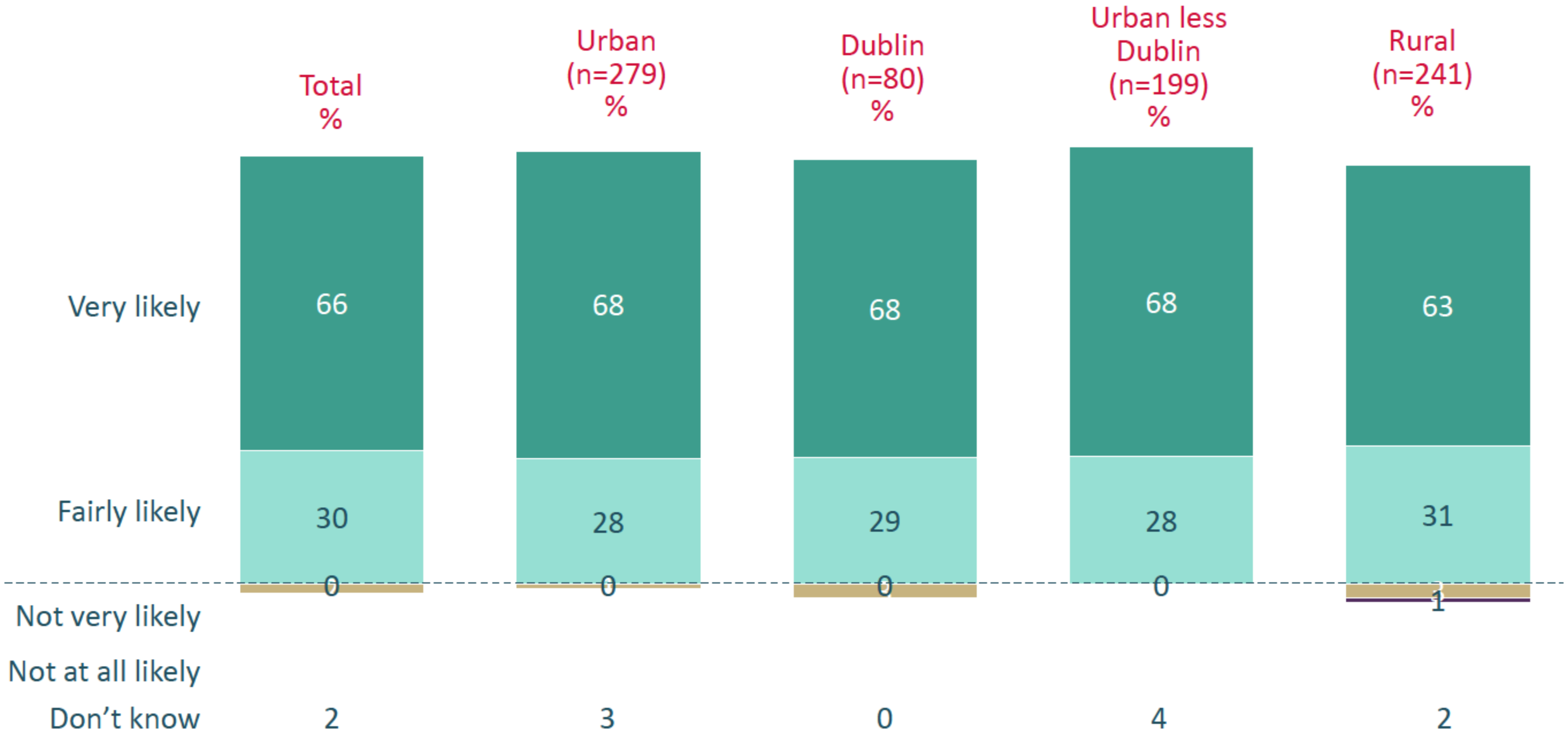
83% of non-bundle owners living in Dublin claim that they are likely to keep their current broadband access mode if a €2 price increase were to be applied to their monthly broadband costs.

REDC

Likelihood of Going Through with Decision (Non Bundle)

(Base: Base: All Non Bundle Owners Making Decision In Response to Price Increase, n=520)

Q.31 How likely are you (and your household) to go through with that decision?

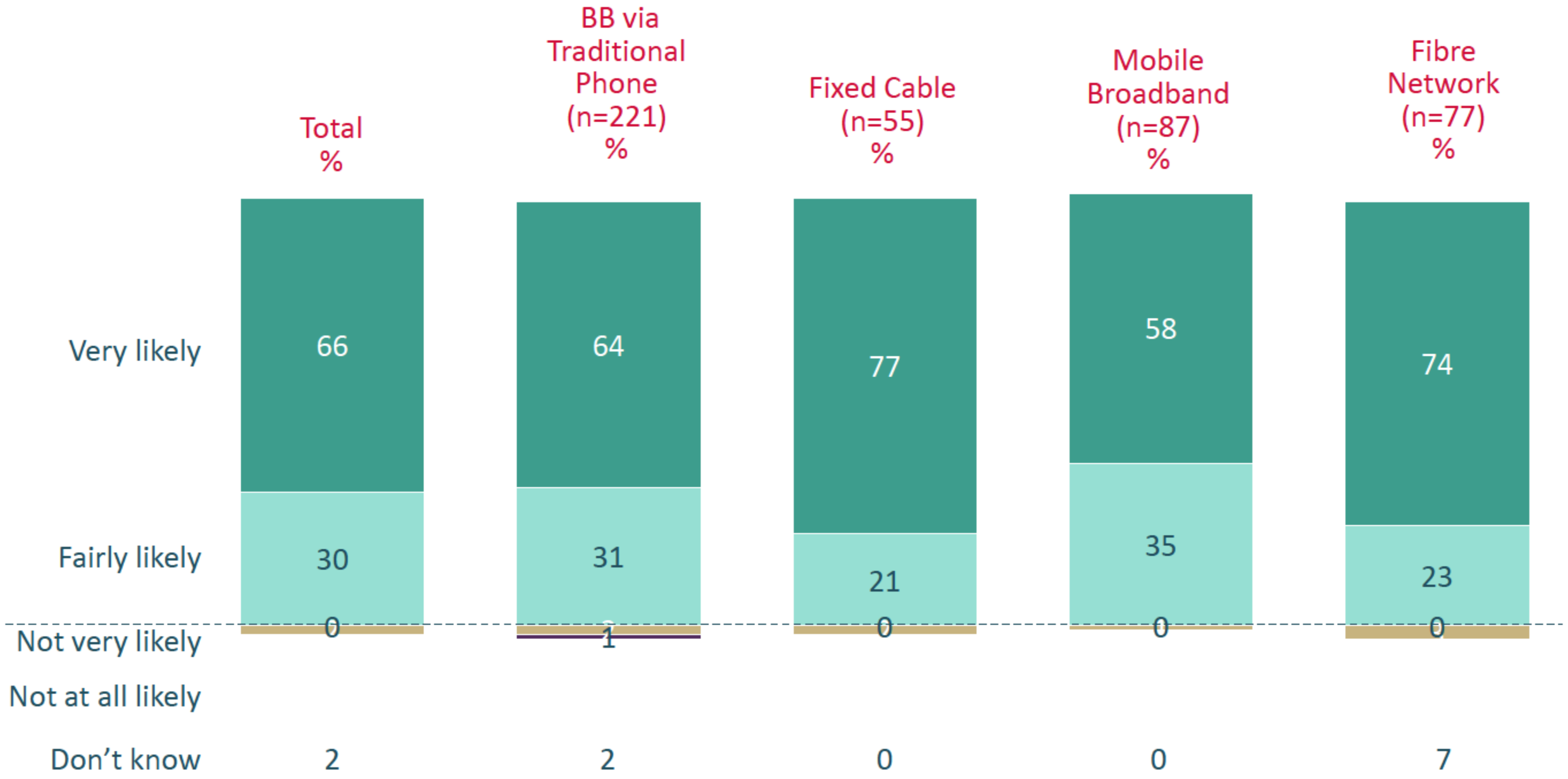


There is little difference by region in terms of levels being very likely to go through with their decision.

Likelihood of Going Through with Decision (Non Bundle)

(Base: Base: All Non Bundle Owners Making Decision In Response to Price Increase, n=520)

Q.31 How likely are you (and your household) to go through with that decision?



66% of non-bundle broadband users say that they would be very likely to go through with their decision, growing to 77% amongst Fixed Cable Broadband users.

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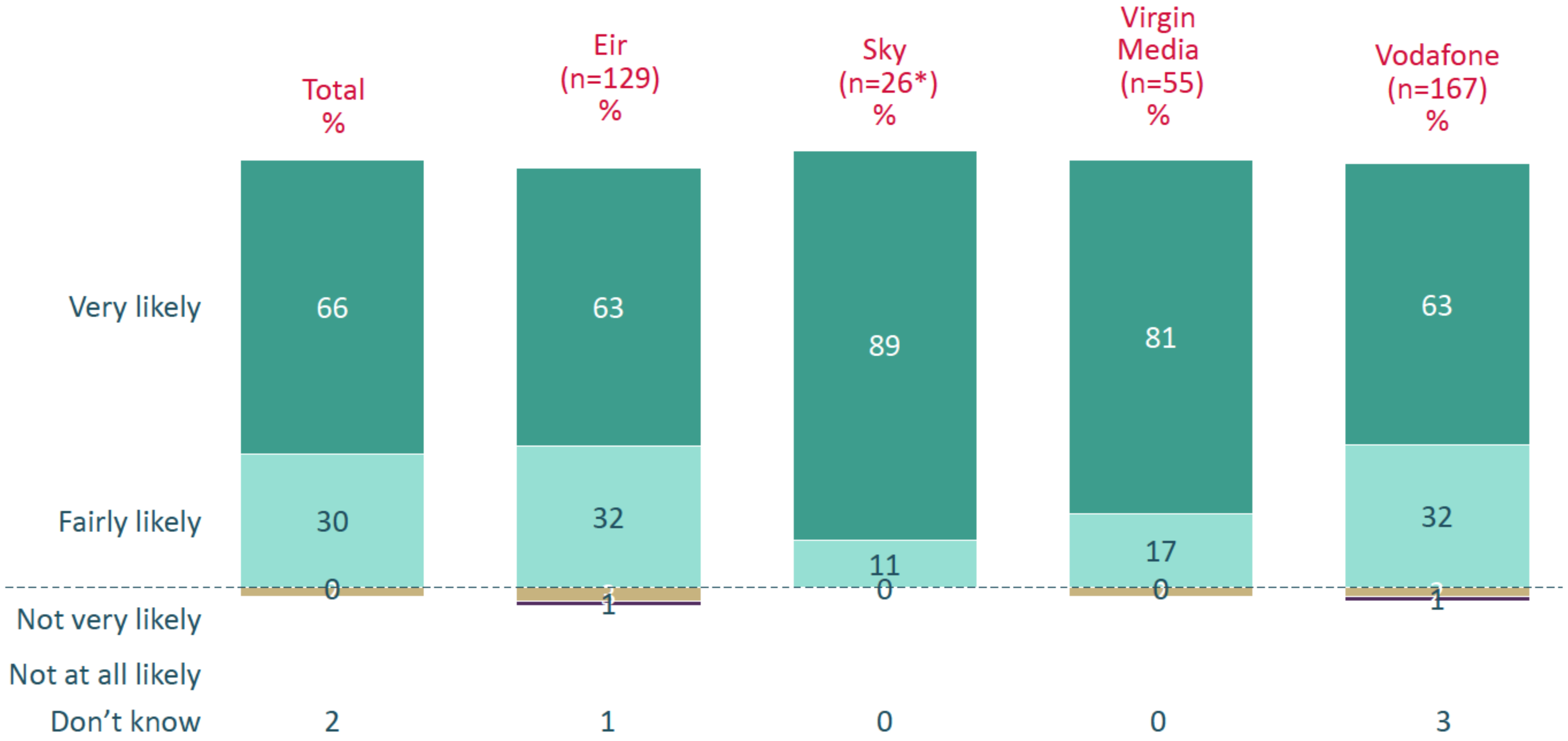
Likelihood of Going Through with Decision (Non Bundle)

(Base: Base: All Non Bundle Owners Making Decision In Response to Price Increase, n=520)

Q.31 How likely are you (and your household) to go through with that decision?



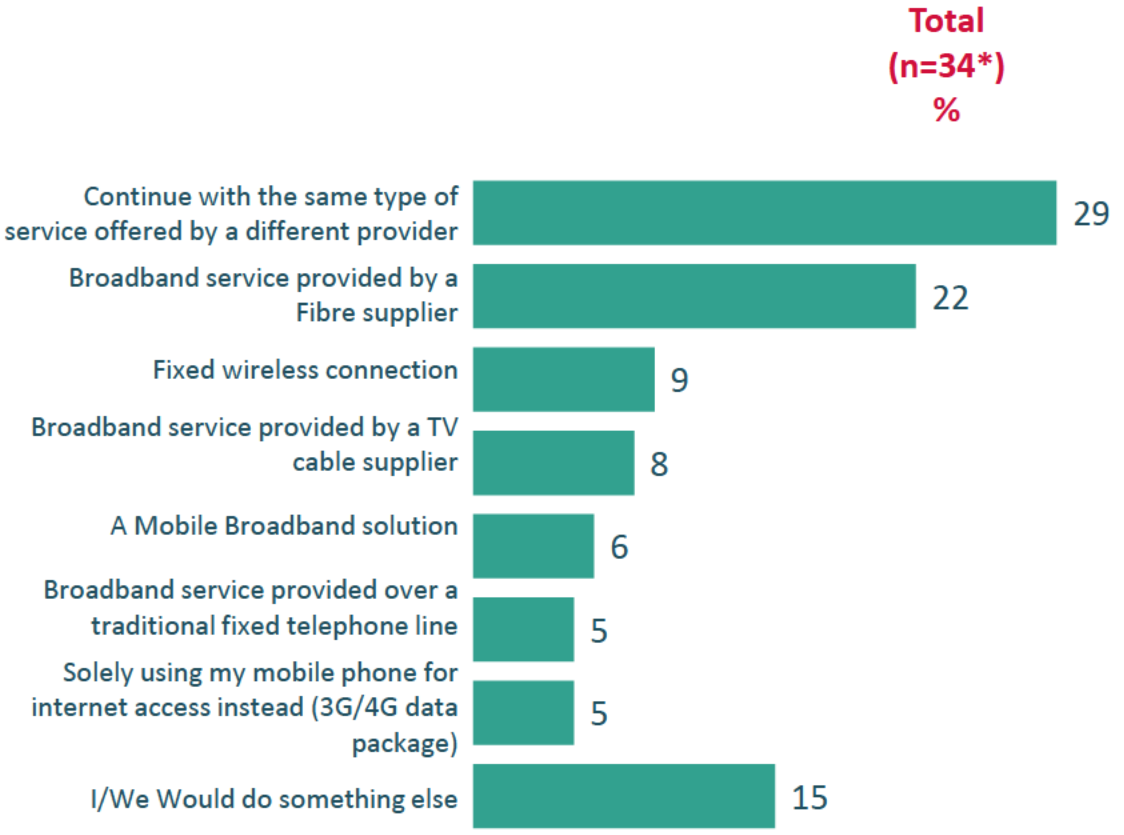
*Caution: Small Base Size

81% of non-bundled Virgin Media customers say that they would be very likely to go through with their decision.

Broadband Type Likely Switch To

(Base: All Non Bundle Owners Likely to Cancel/Switch Broadband, n=34*)

Q.32 Which type of broadband service would you and your household be most likely to switch to?



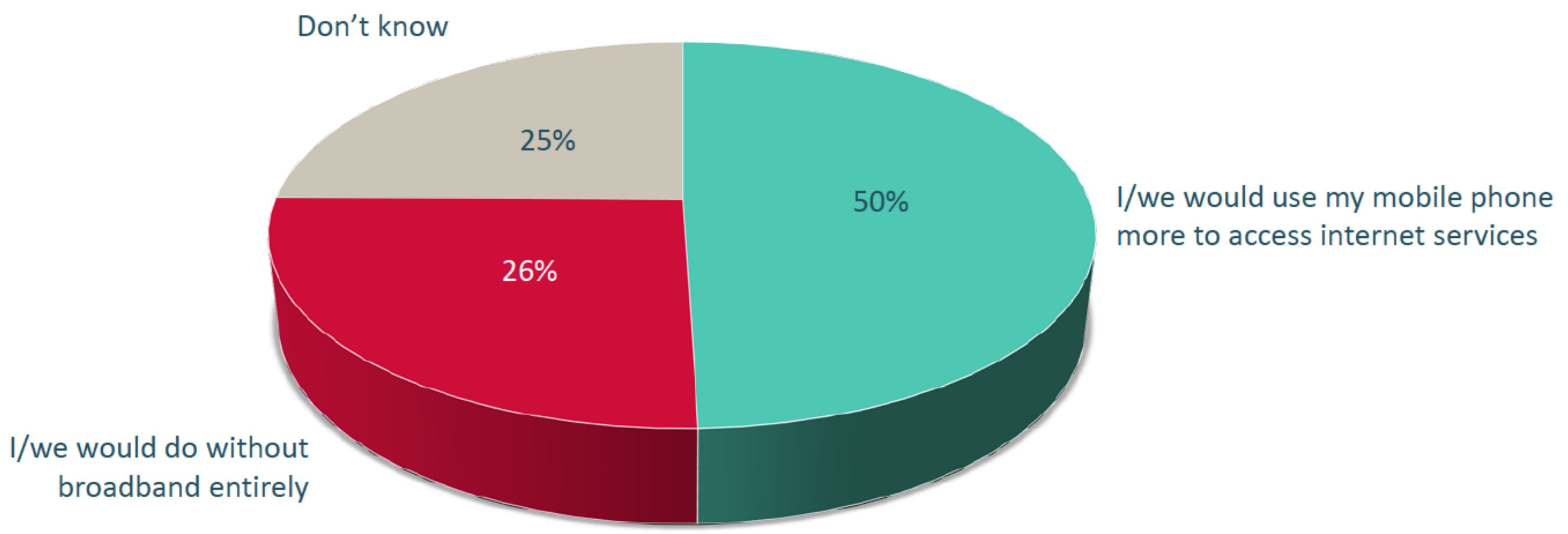
*Caution: Small Base Size

Amongst non-bundle users that would be likely to cancel/switch their broadband in the event of €2 price increase, 29% say that they would continue with the same type of service offered by a different provider, but due to the base size being so small, it is not possible to draw any firm conclusions on this.

Likely Alternative For Those That Would Cancel Broadband – Non-Bundle

(Base: All Non Bundle Owners Likely to Cancel Completely; n=12*)

Q.33 You have just said that you would cancel your household's broadband subscription, what would you do instead?



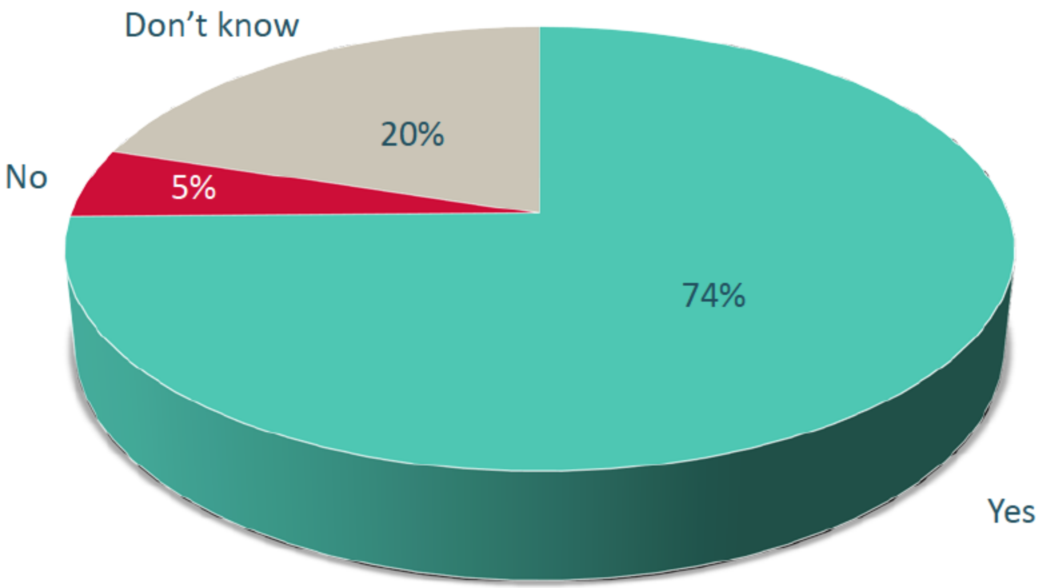
*Caution: Small Base Size

50% of non-bundle owners likely to cancel their broadband completely in the event of a €2 increase say that they would use their mobile phone more to access internet services, but due to the base size being so small, it is not possible to draw any firm conclusions on this.

Awareness If Broadband Type Is Available In – Non Bundle

(Base: All Non Bundle Owners Likely to Switch Broadband; n=19*)

Q.34 Do you know if this access type is available in your area?



*Caution: Small Base Size

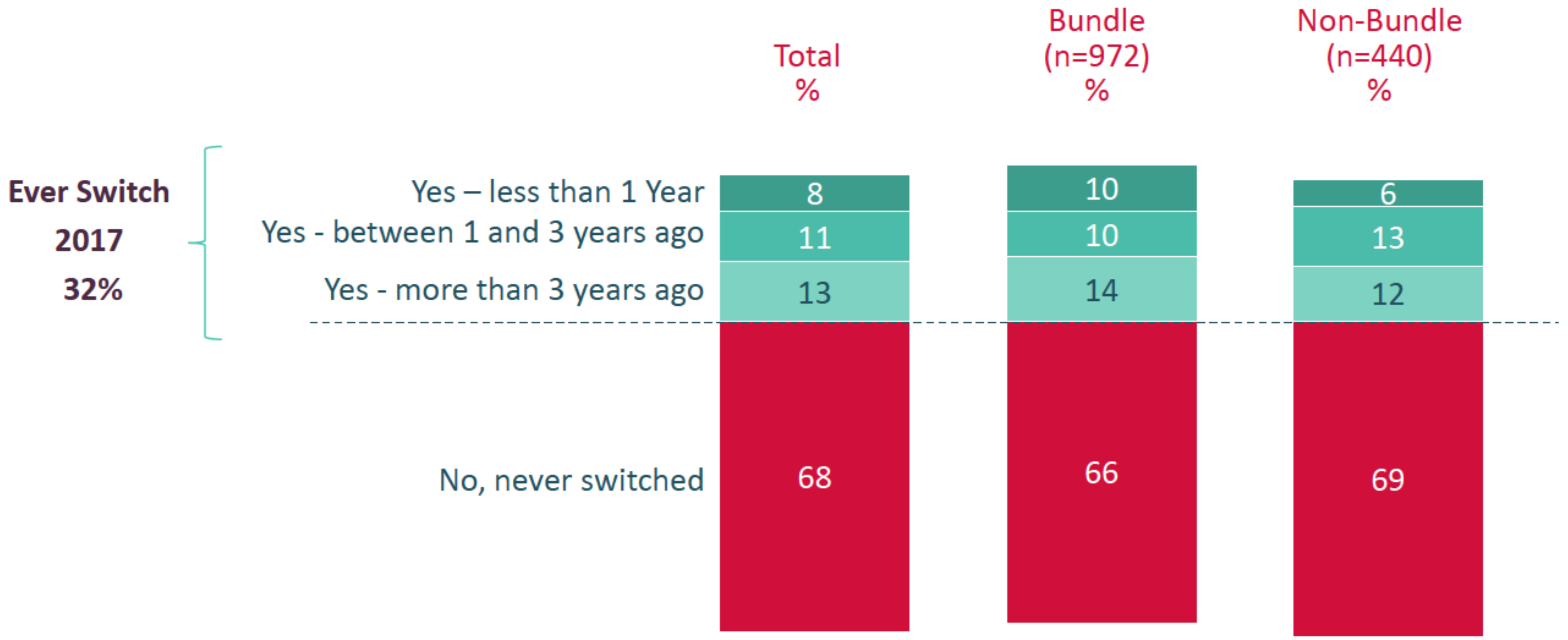
74% of non-bundle owners likely to switch their broadband in the event of a €2 price increase know that the broadband access type they say they will switch to is available in their area, but due to the base size being so small, it is not possible to draw any firm conclusions on this.

Contract periods & Switching behaviour

Incidence Of Ever Switching Broadband

(Base: All With Broadband Access, n=1616)

Q.35 Have you and your household ever switched broadband supplier in your home?



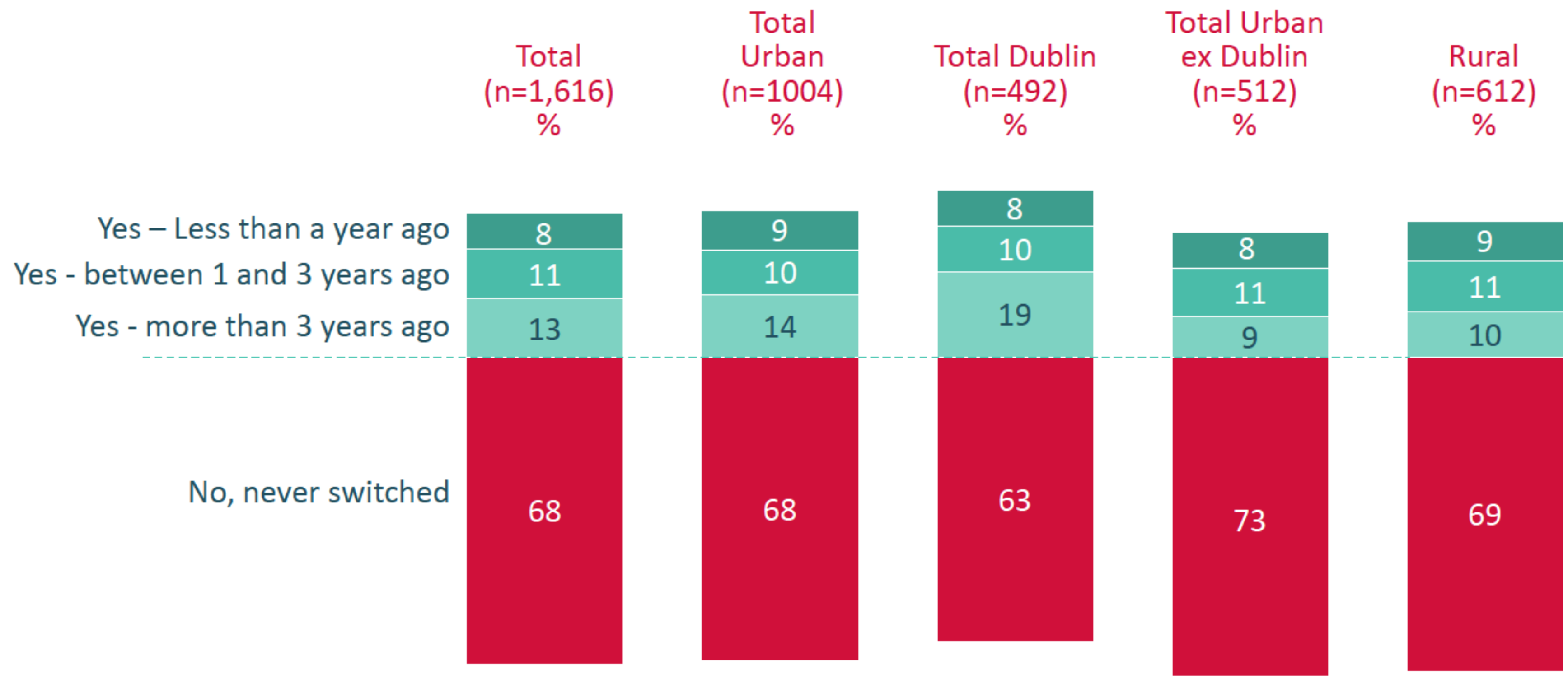
45% ever switched broadband 2014

68% of those in the survey with broadband claim to have never switched their broadband supplier.

Incidence Of Ever Switching Broadband

(Base: All with Broadband Access n=1616)

Q.35 Have you and your household ever switched broadband supplier in your home?

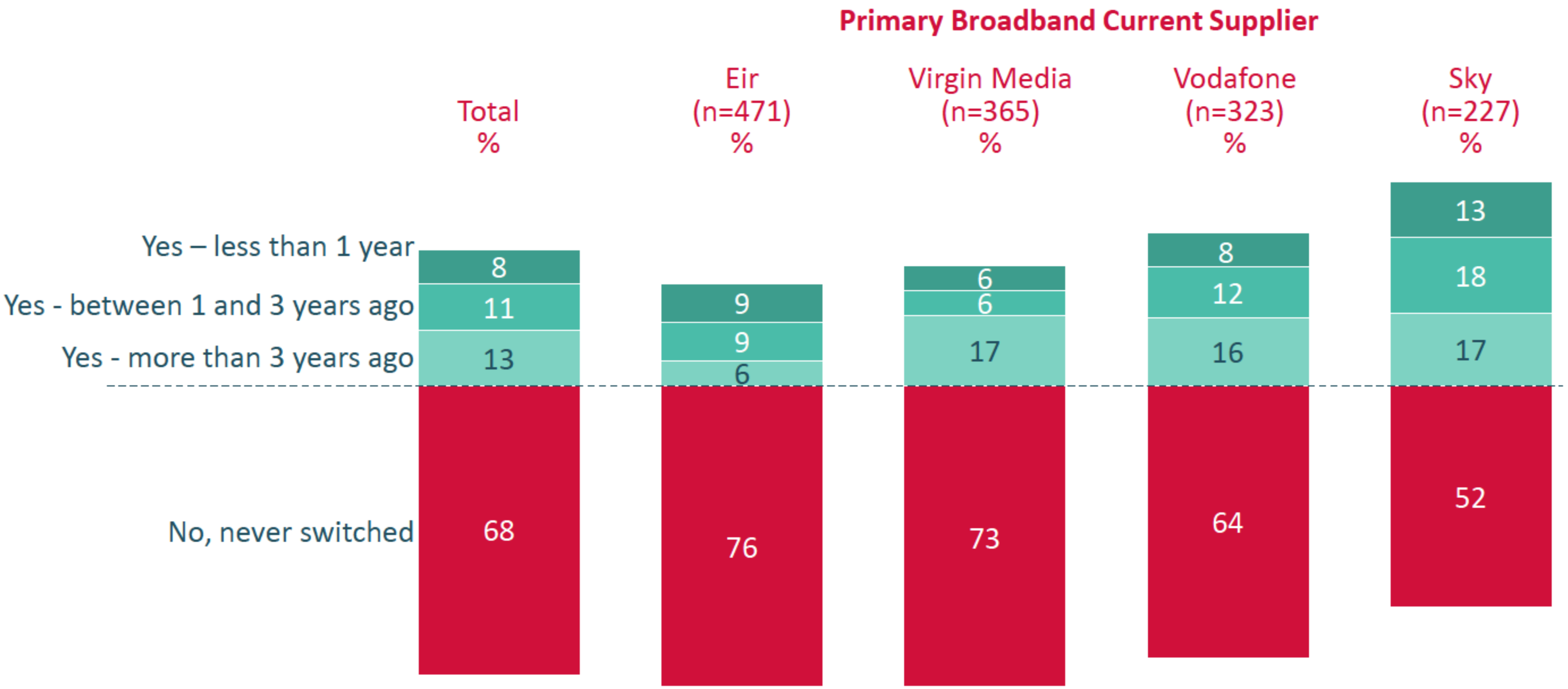


Incidence levels of 'never switched' is highest amongst those living in the Urban less Dublin region (73%).

Incidence Of Ever Switching Broadband

(Base: All Broadband Access n=1616)

Q.35 Have you and your household ever switched broadband supplier in your home?



Sky customers have the highest levels of having previously switched broadband supplier at 48% of their customer base, according to this survey.

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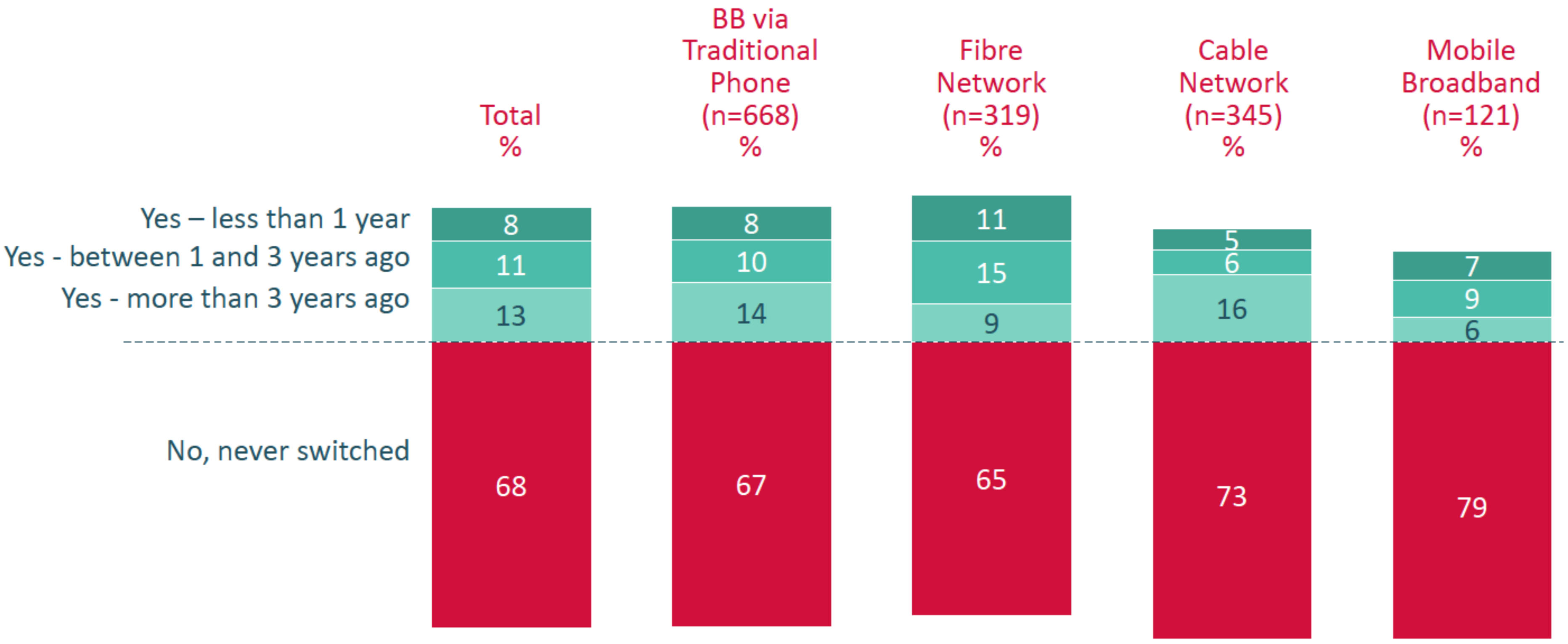
Incidence Of Ever Switching Broadband

(Base: All with Broadband Access n=1616)

Q.35 Have you and your household ever switched broadband supplier in your home?



Mobile Broadband customers have the highest levels of 'never switched' with 79% claiming this to be the case.

Previous Broadband Supplier – Switched From

(Base: All Previously Switched Broadband Supplier, n=511)

Q.36 What operator previously provided you and your household with your last broadband service? SINGLE CODE

Primary Current Broadband Supplier

Previous Provider of Broadband	Total %	2014 Total %	Eir (n=112) %	Virgin Media (n=100) %	Vodafone (n=118) %	Sky (n=109) %
Eir	43	49	0	59	62	55
Vodafone	17	19	33	6	0	18
Three	11	4	11	3	15	7
Virgin Media	9	8	18	0	4	17
Sky	9	4	15	18	8	1
Imagine	2	3	5	1	1	0
Pure	1	1	2	0	2	0
Digiweb/Smart	0	2	1	1	0	0
Don't Know	7	3	11	8	2	3

43% of broadband switchers claim that their previous provider was Eir, growing to 62% amongst current Vodafone customers.

Previous Broadband Type Used

(Base: All Previously Switched Broadband Supplier, n=511)

Q37. Thinking about your previous broadband supplier which of the following access modes did you previously use?

	Previous Broadband Used %	2014 %	Current Broadband Access Type: Traditional Phone (n=224) %	Fixed Fibre (n=111) %	Cable Network (n=95) %	Mobile Broadband (26*) %
Fixed Broadband via traditional phone line	54	69	77	27	49	18
Fixed Broadband via Fibre network	13	3	3	28	24	3
Fixed Broadband via a cable TV	10	6	5	25	8	8
3G/4G Mobile Broadband	10	8	7	8	6	49
Broadband provided by Satellite	3	1	3	2	0	6
Fixed Wireless Connection	2	9	*	2	2	0
Internet access over mobile phone using 3G/4G (not Wi-Fi)	1	1	1	0	0	7
Other	1	-	0	0	4	3
Don't Know	6	3	3	8	10	4

*Caution: Small Base Size

54% of broadband switchers previously had fixed broadband via a traditional telephone line. 77% of those currently using fixed broadband via a traditional telephone line used this same access type with their previous broadband supplier.

Reason For Switching Broadband

(Base: All Previously Switched Broadband Supplier, n=511)

Q38. What was your and your household's main reason for switching broadband supplier? For what other reasons did you switch?

	Main Reason %	Any Reason %	Any Reason 2014 %	Urban (n=320) %	Total Dublin (n=182) %	Urban excl. Dublin (n=138) %	Rural (n=191) %	Traditional Phone (n=224) %	Fixed Fibre (n=111) %	Cable Network (n=95) %	Mobile Broadband (26*) %
Cost – better price with new supplier	60	69	55	68	62	75	70	72	70	58	89
Contract – previous contract finished/new supplier offered short term contract	22	31	9	27	29	24	37	29	36	24	21
Bundling – switched supplier to bundle my broadband service with other communication services	11	16	15	17	17	17	15	16	21	20	0
Moved house	8	10	9	10	12	7	9	8	9	20	7
Speed/download limits	0	41	38	37	33	43	48	43	29	41	43

Any Reason %

*Caution: Small Base Size

On average 69% of switchers say that cost was a reason for switching, growing to 75% in the Urban (excl. Dublin) region.

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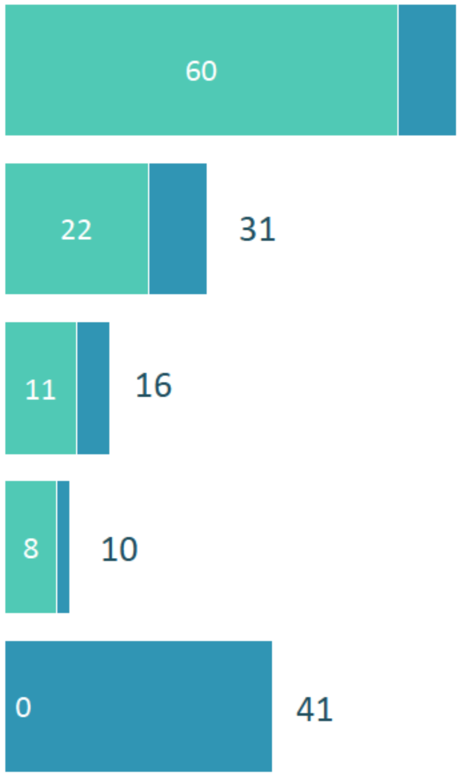
Reason For Switching Broadband

(Base: All Previously Switched Broadband Supplier, n=511)

Q38. What was your and your household main reason for switching broadband supplier? For what other reasons did you switch?



	Main Reason %	Any Reason %	Any Reason 2014 %	Eir (n=112) %	Virgin Media (n=100) %	Vodafone (n=118) %	Sky (n=109) %
Cost – better price with new supplier	60	69	55	68	60	79	69
Contract – previous contract finished/new supplier offered short term contract	22	31	9	35	26	27	24
Bundling – switched supplier to bundle my broadband service with other communication services	11	16	15	17	19	10	27
Moved house	8	10	9	10	16	5	12
Speed/download limits	0	41	38	37	40	42	33

79% of those that have switched to Vodafone say that cost played a part in deciding to switch broadband supplier.

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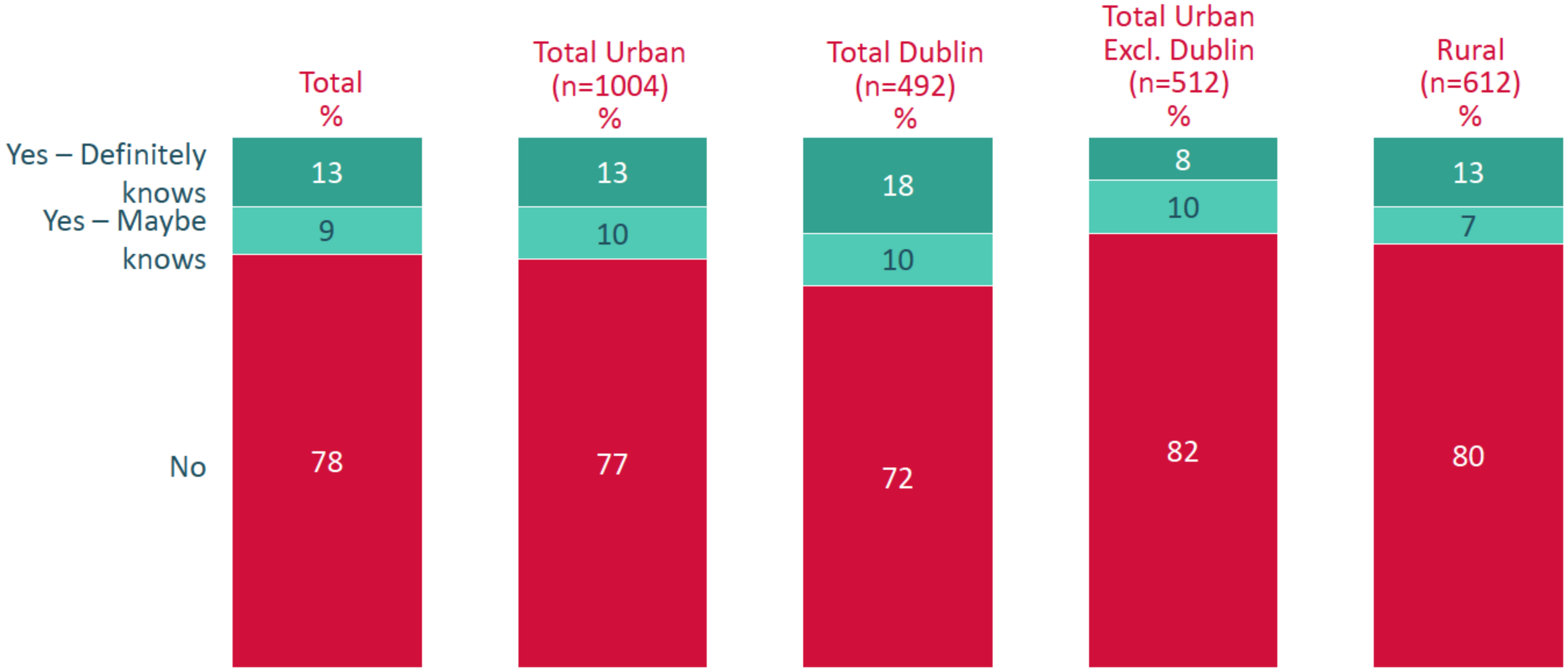
Knowledge of broadband speeds

Knowledge Of Maximum Claimed Download Speed of Broadband

(Base: All with Broadband Access, n=1616)

Q.39 Do you know the maximum claimed download speed for your main broadband service?



	Total	Total Urban	Total Dublin	Total Urban Excl. Dublin	Rural
Net: Yes 2017	**22**	**23**	**28**	**18**	**20**
Net: Yes 2014	35	37	36	38	33

22% of broadband users surveyed say that they know what the maximum claimed download speed for their main broadband service is, with 13% saying they 'Definitely Know'. 10% of those in Dublin maybe know their speed, while 18% 'Definitely' know.

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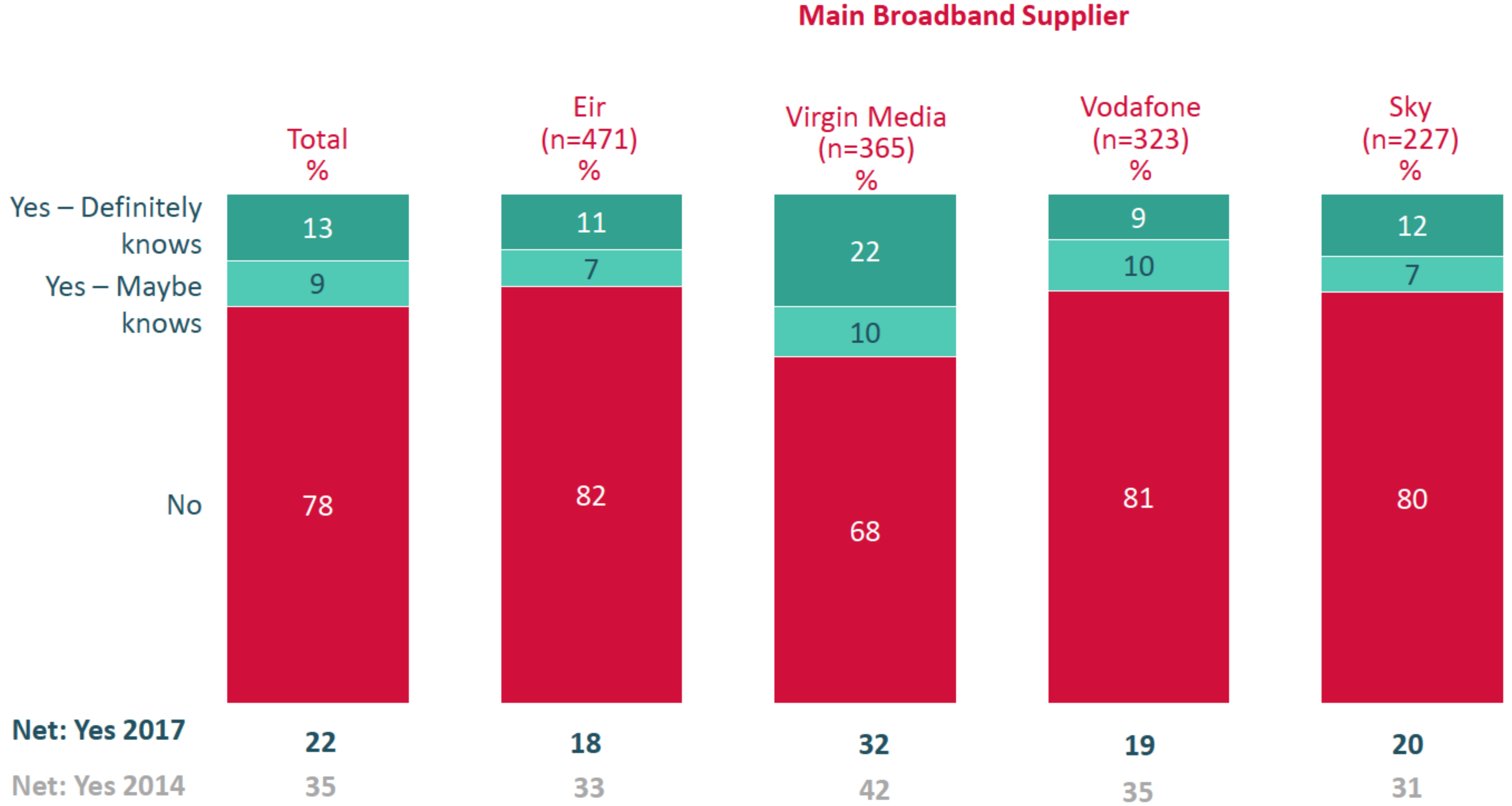
Knowledge Of Maximum Claimed Download Speed of Broadband

(Base: All with Broadband Access, n=1616)

Q.39 Do you know the maximum claimed download speed for your main broadband service?



Knowledge of speed is highest for customers of Virgin Media with 32% aware of claimed maximum download speed; 22% claim to 'Definitely Know'.

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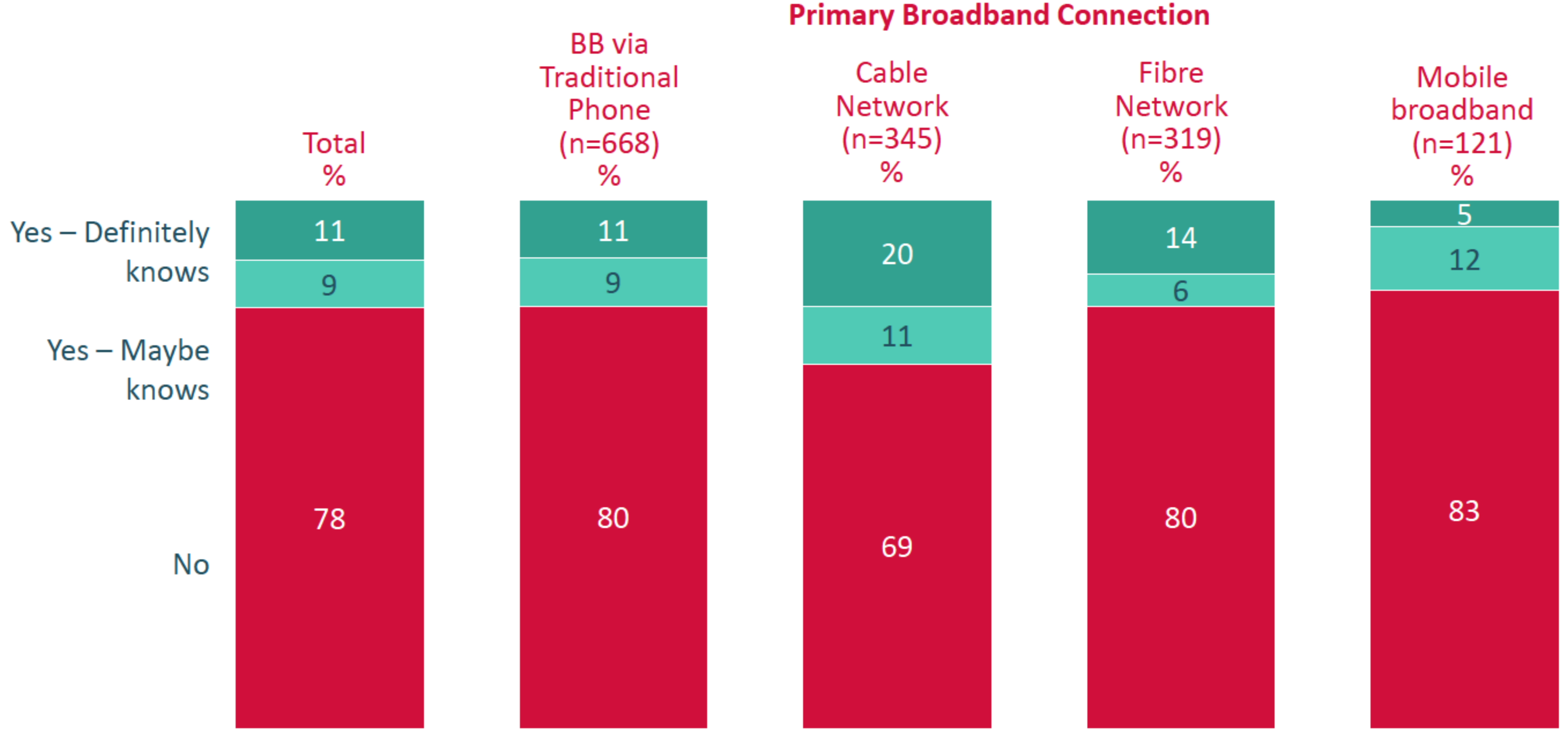
Knowledge Of Maximum Claimed Download Speed of Broadband

(Base: All with Broadband Access, n=1616)

Q.39 Do you know the maximum claimed download speed for your main broadband service?



	Total	BB via Traditional Phone	Cable Network	Fibre Network	Mobile broadband
Net: Yes 2017	**22**	**20**	**31**	**20**	**17**
Net: Yes 2014	35	32	42	40	31

Claimed knowledge of speed is highest for those with a Cable network connection at 31%; 20% say they 'Definitely Know'.

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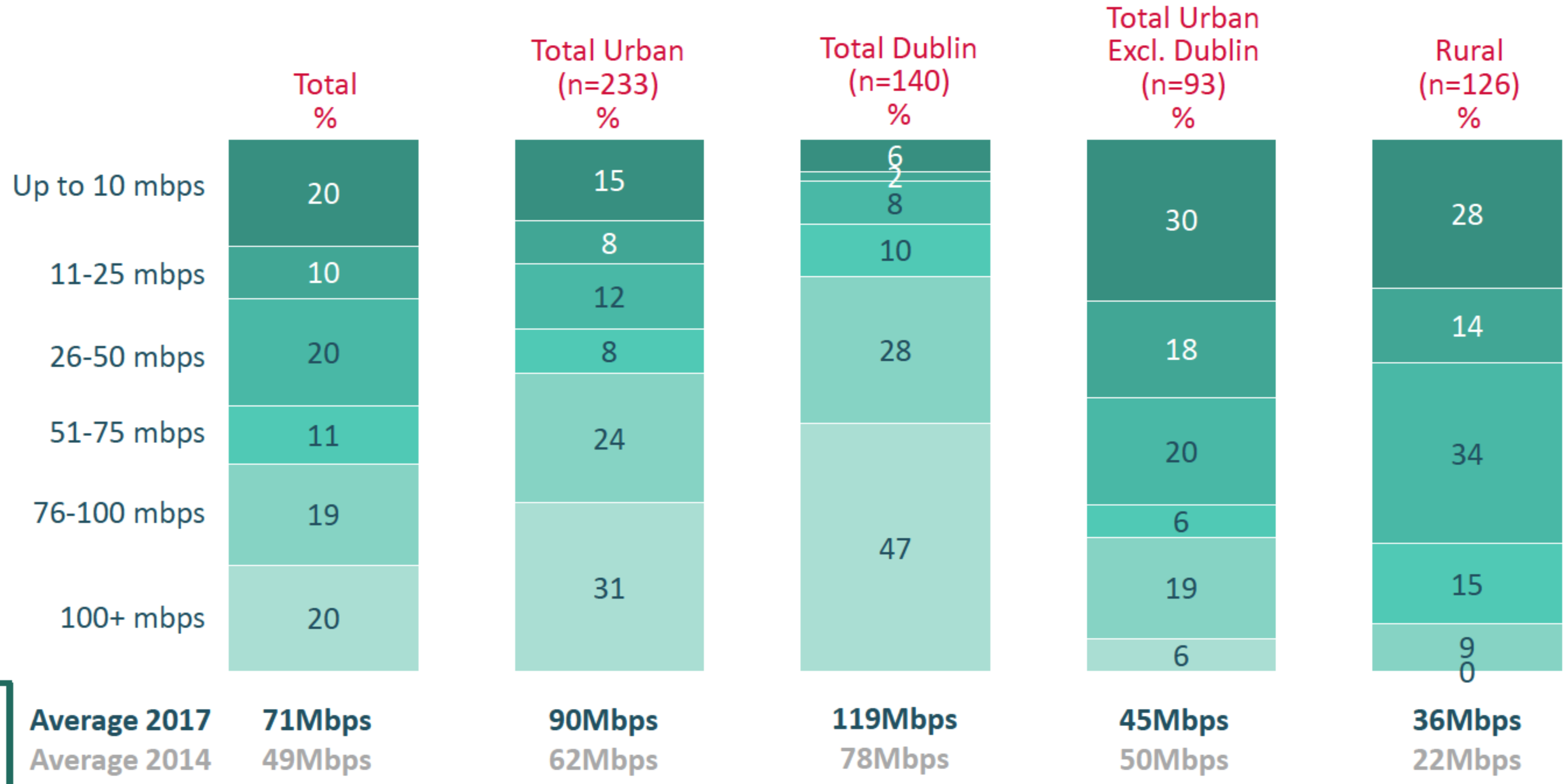
Maximum Claimed Download Speed of Broadband

(Base: All Definitely/Maybe Know Download Speed, n=359)

Q.40 What is the maximum claimed ‘up to’ download speed for your main broadband service?



Note: Averages refer to average claimed speed per household

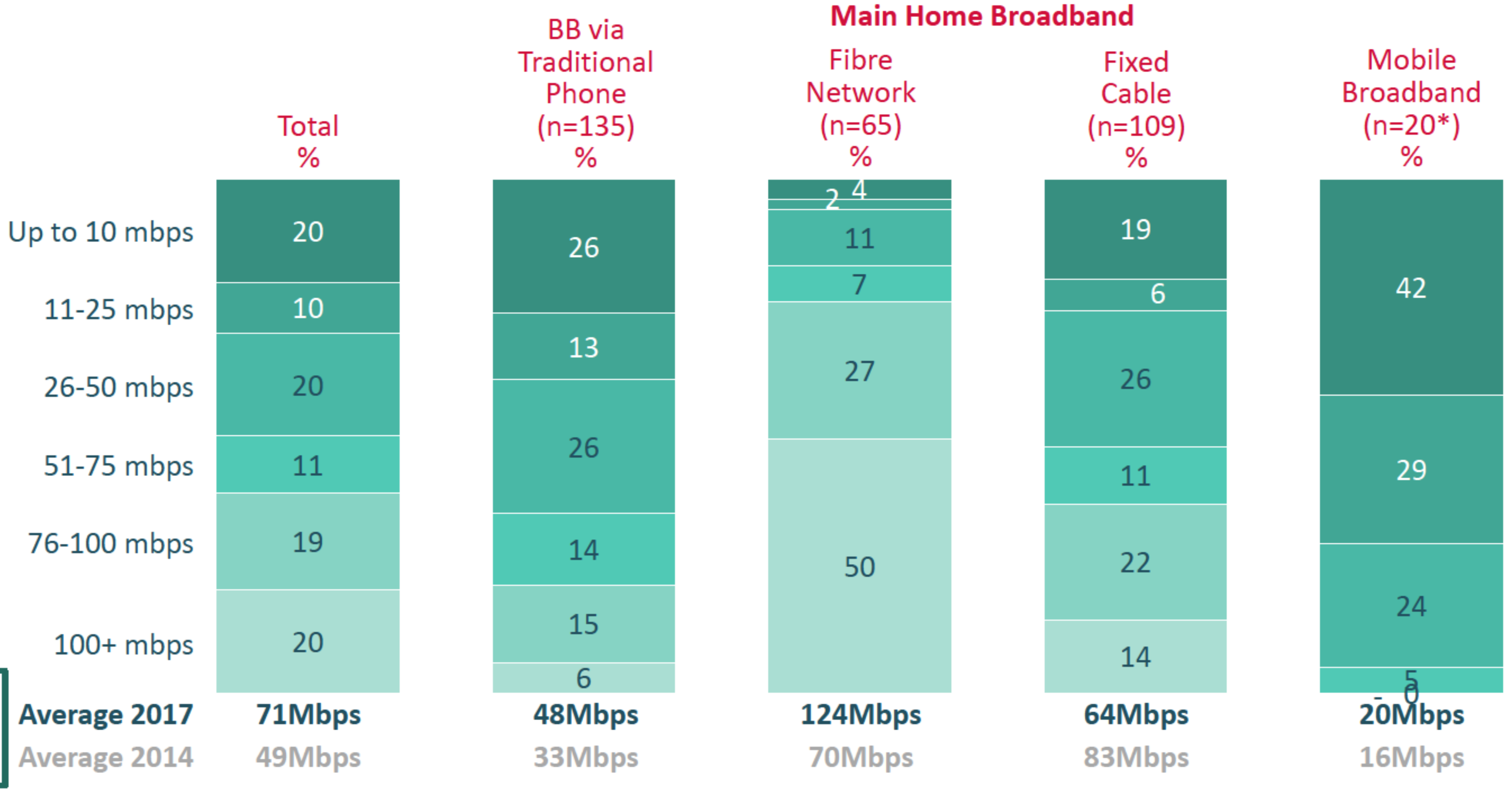
Average maximum claimed ‘up to’ download speed has grown from 49Mbps in 2014 to 71Mbps in 2017. Average claimed speed is highest in Dublin (119Mbps)

REDC

Maximum Claimed Download Speed of Broadband

(Base: All Definitely/Maybe Know Download Speed, n=359)

Q.40 What is the maximum claimed ‘up to’ download speed for your main broadband service?



Note: Averages refer to average claimed speed per household

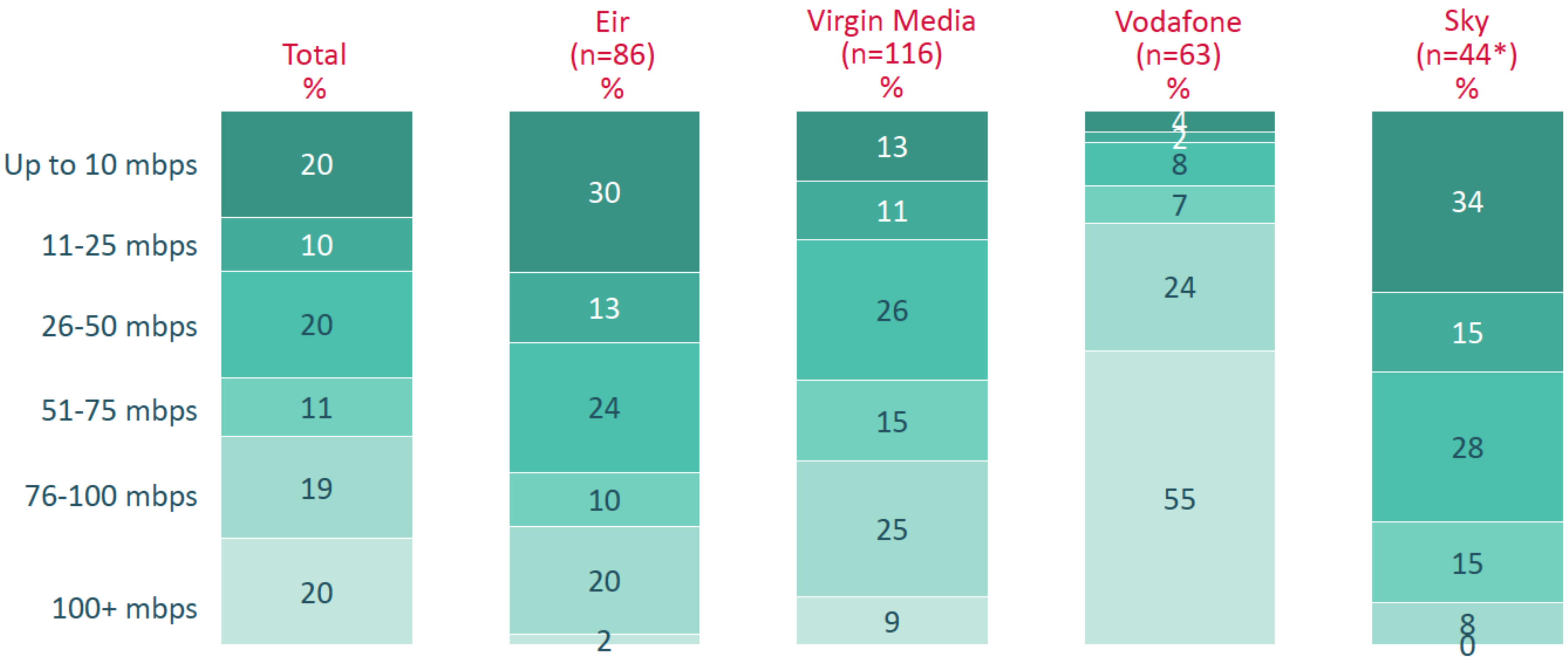
*Caution: Small Base Size

Average claimed download speed of service is highest for Fibre Network at 124Mbps.

Maximum Claimed Download Speed of Broadband

(Base: All Definitely/Maybe Know Download Speed, n=359)

Q.40 What is the maximum claimed ‘up to’ download speed for your main broadband service?



Note: Averages refer to average claimed speed per household

	Total	Eir	Virgin Media	Vodafone	Sky
Average 2017	**71Mbps**	**44Mbps**	**61Mbps**	**130Mbps**	**33Mbps**
Average 2014	49Mbps	38Mbps	84Mbps	39Mbps	32Mbps

*Caution: Small Base Size

Vodafone customers have the highest average claimed download speed at 130 Mbps.

Key Findings

Key Findings from this Survey

- 89% of the nationally representative sample of telecommunication decision makers aged 18+ in this survey have access to broadband at home. This figure has increased from 87% in 2014 when a comparable survey was conducted. Traditional fixed line remains the most common means of accessing broadband in Ireland at 43% but is less common than in 2014 (54%). Fibre access has increased most significantly in the time period and has increased from 7% of all broadband connections in 2014 to 19% in 2017.
- The average length of time accessing the internet has also increased over the time period according to the survey with 5 hours the average daily household use of internet (up from 4 hours in 2014). The nature of what users are accessing their service for has also changed with a growth in data usage services such as downloading/streaming movies/music and TV programmes. Working from home as a reason for using broadband has also increased from 16% to 20% in 2017.
- 60% of Survey respondents have bundled their broadband service with other telecommunication services at home with represents a decline from 2014 (76%) The most popular bundle type in this survey is a Broadband Bundle with Landline and TV (40%) this bundle type has increased insignificantly from 2014 (24%) and is likely explaining the rise in average bundle cost to €74 in 2017 from €58 in 2014.
- The Average length of time with current broadband supplier is 2 years and 11 months. 32% of broadband users have previously switched in the past and the main reason for switching is due to a more competitive price with service provider switched to. This reason was expressed by 69% of all those who switched supplier.
- 22% of current broadband users claimed to know the maximum download speed available on their broadband service. This figure has fallen from 2014 where 35% of users claimed to know the speed of their service. Among those who claim to know the maximum speed of service 71Mbps was the average speed expressed – an increased from 49 Mbps in 2014.

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THANK YOU