REDC

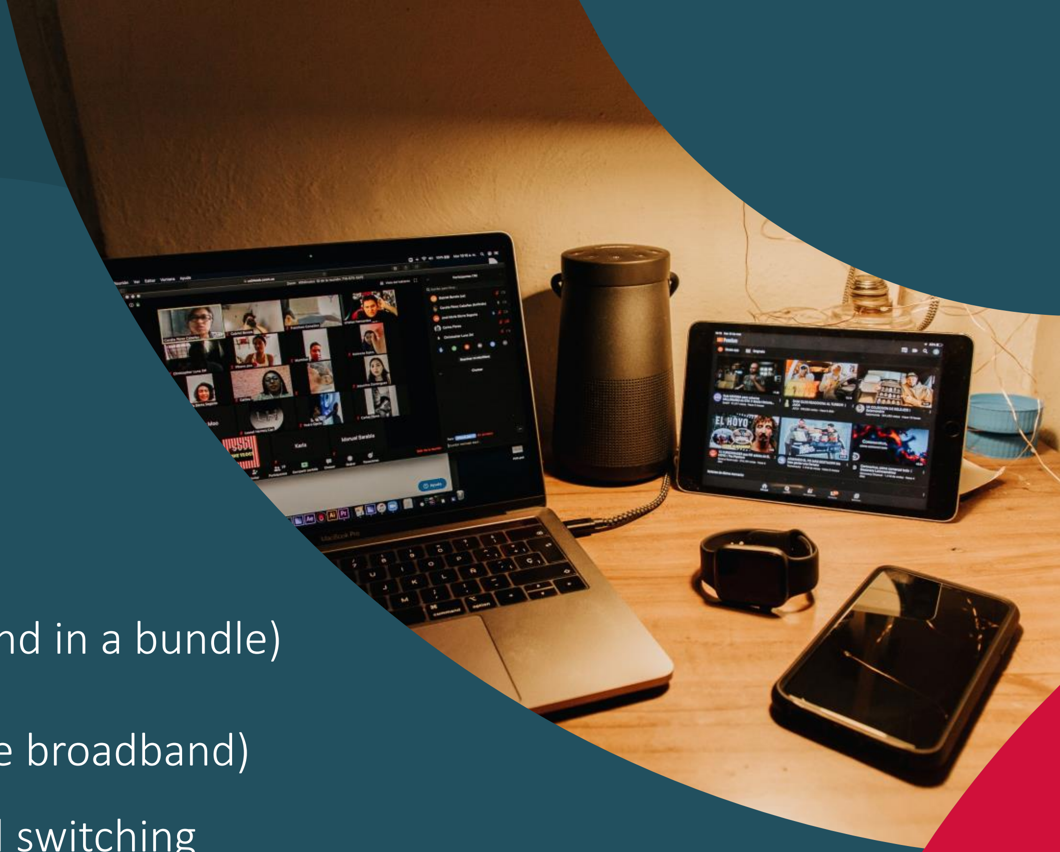
Commission for Communications Regulation

ComReg: WLA/WCA – Residential Sector

May 2022

JOB REF/ 562921

Presentation Structure



1. Sample Profile
2. Broadband penetration (including those without access)
3. Broadband access and usage
4. Suppliers of broadband
5. Bundling of broadband, contracts and cost
6. SSNIP (with broadband in a bundle)
7. SSNIP (for standalone broadband)
8. Contract periods and switching behaviour
9. Knowledge of broadband speeds
10. Key Findings

Background

- 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 2022, is to understand consumer use of and attitudes surrounding broadband product characteristics, switching behaviour and a number of other parameters, including but not limited to, the bundling of retail broadband products and the usage of landline and mobile phone.

- Specifically, the 2022 market research examines access to broadband in the retail market, the modes of broadband access, and how access type impacts on consumer behaviour.

Methodology

- 2,010 interviews were conducted at a national level, with the sample weighted accordingly. Interviews were conducted face to face on CAPI handheld machines.

- The sample was closely controlled to interview in different population densities, named in the report as ComReg regions 5 – 1 (the definition of which are provided below). Analysis across regions is key as it is suspected that access to broadband services will differ by region and thereby impact consumer behaviour.

ComReg Region	Number of Interviews Conducted	Weighted Representative Sample
Region 5 - More than 100 people per Sq Km	654	1286
Region 4 - More than 50 but less than 100 people per Sq Km	352	201
Region 3 - More than 25 but less than 50 people per Sq Km	350	281
Region 2 - More than 10 but less than 25 people per Sq Km	351	221
Region 1 - Less than 10 people per Sq Km	300	20
	2010	2010

- The interviewees were household decision makers for telecommunications and quota controls were imposed to ensure a representative sample.

- Fieldwork was conducted between February and April 2022.

Note on Sample Size

- ‘Primary broadband access type’ relates to the one most commonly used broadband access type in the household. Below is a list of the sample sizes achieved for primary access mode in the survey.

Primary Broadband Access Type	Unweighted Base Size	% Weighted Share among those with BB
Fixed Landline	487	22%
Fibre Network	693	40%
Cable Network	262	22%
Mobile Broadband	102	5%
Mobile Phone access	78	5%
Fixed Wireless	66	3%
Satellite Broadband	89	3%
Other	24	1%
Total with broadband access	1801	

- The base sizes listed above will fall even further when questions are filtered by certain subgroups.
- All base sizes shown throughout the presentation are unweighted as this represents the true number of interviews conducted.

1.

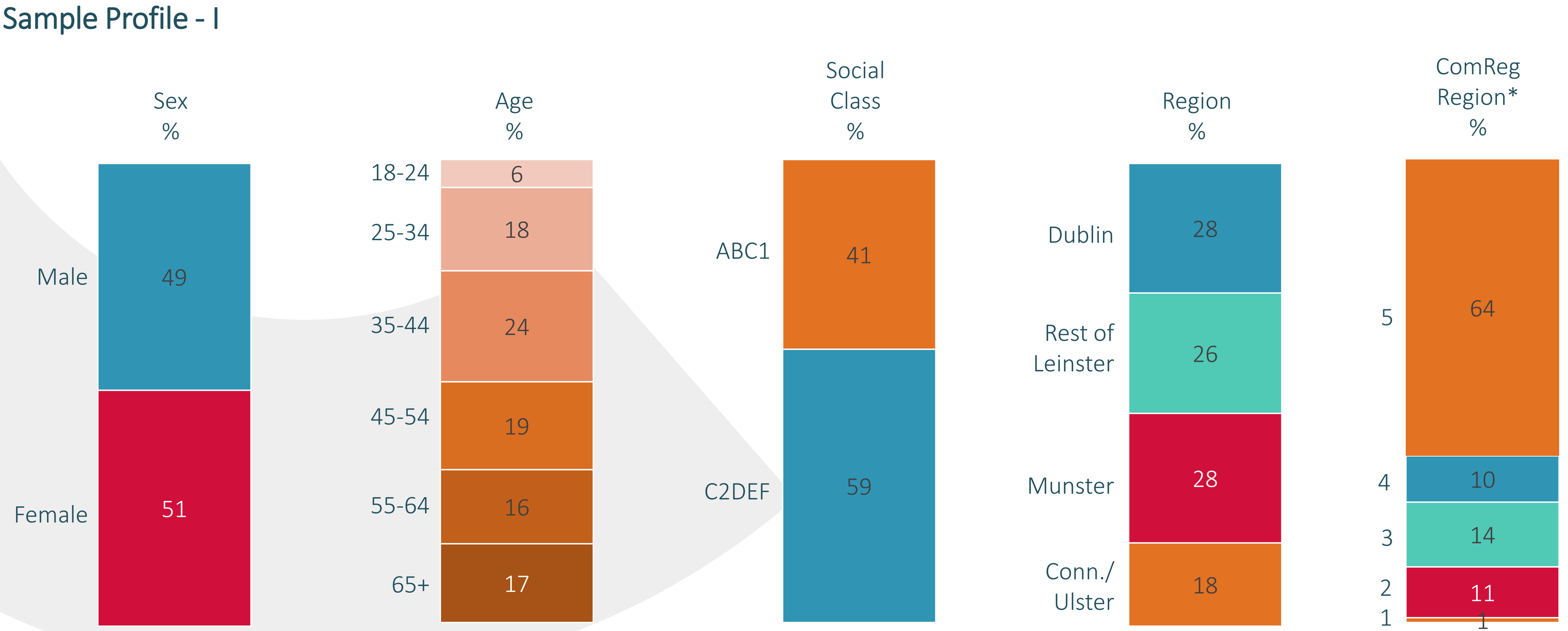
Sample Profile

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, Principal 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

Sample Profile -I

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

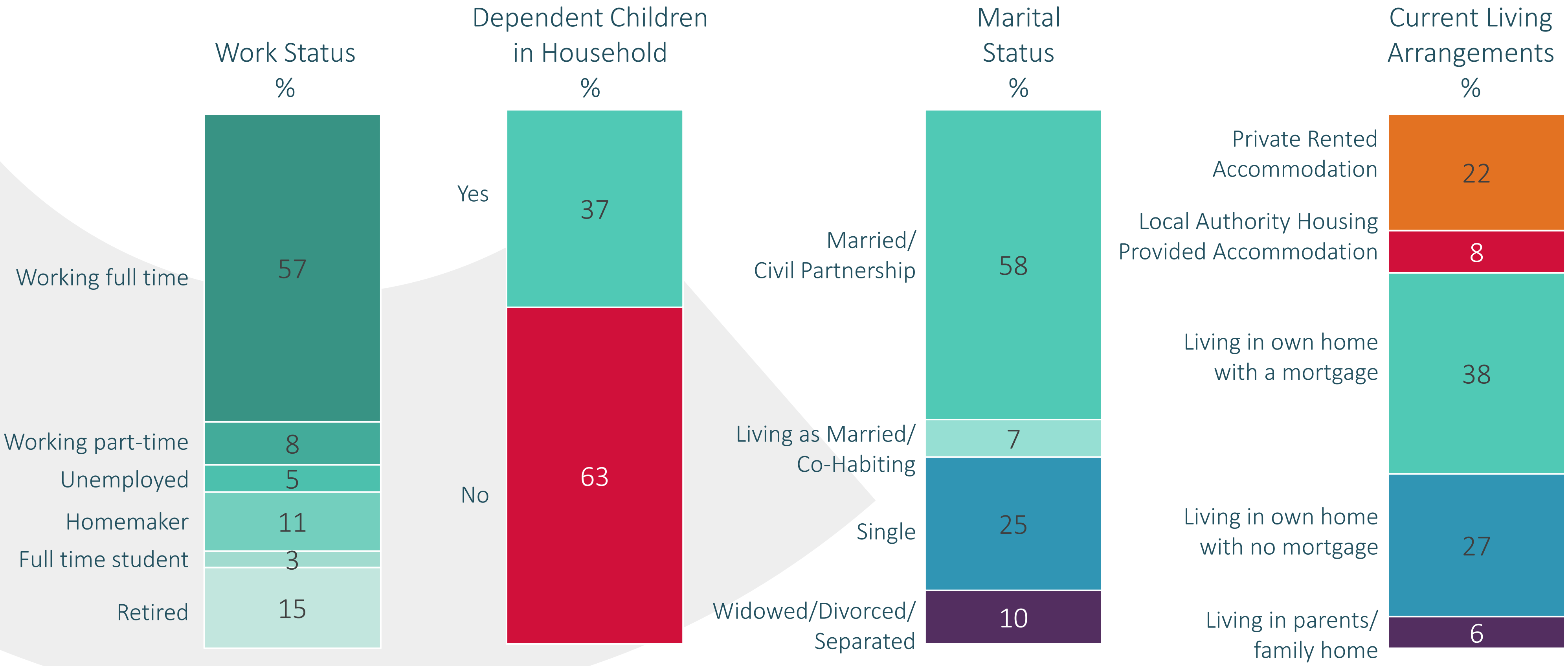


(Base: All Household Decision Makers 18+, n= 2010) * ComReg Region see definition slide 4

Sample Profile - II

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

Sample Profile - II



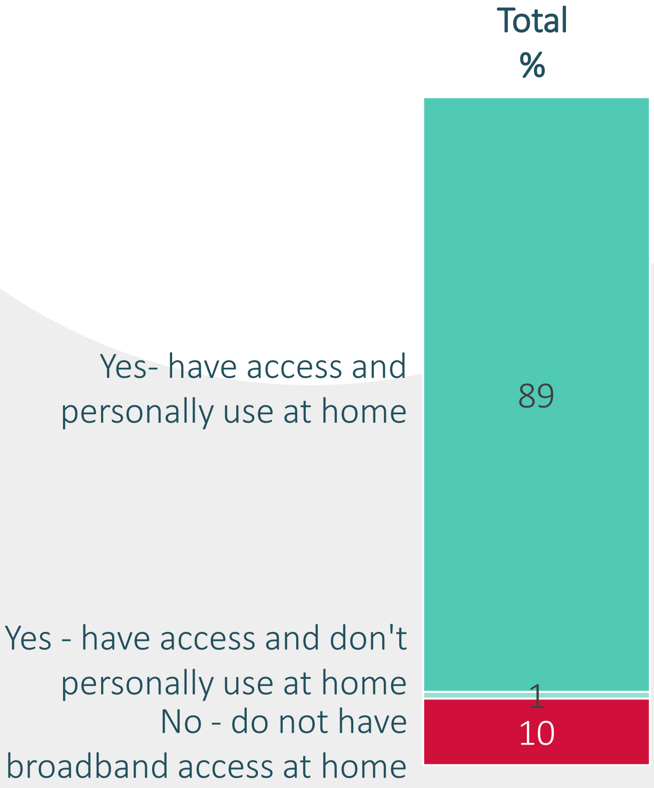
(Base: All Household Decision Makers 18+, n= 2,010)

2.

Broadband Penetration
(including those without access)

90% of those surveyed have access to broadband at home

The incidence of broadband access is highest in Regions 4 & 5. The results are broadly similar to the 2017 market research with a marginally higher incidence of broadband access nationwide.



NET Yes 2022 90%

NET Yes 2017 89%

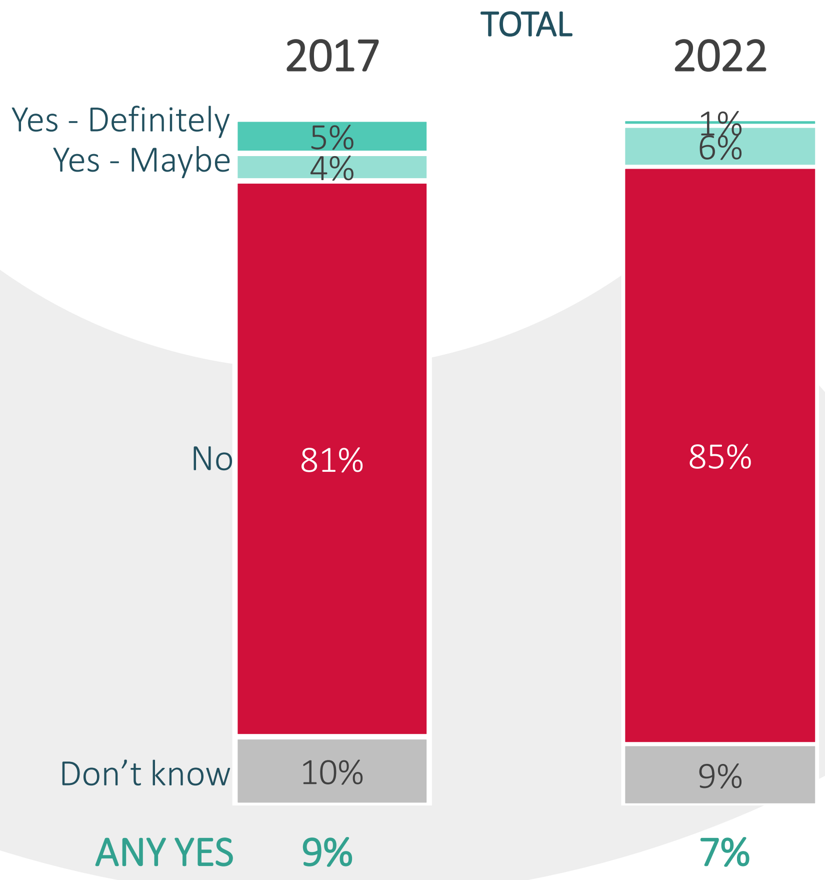
	REGION 1 (n=303)	REGION 2 (n=351)	REGION 3 (n=350)	REGION 4 (n=352)	REGION 5 (n=654)
Yes- have access and personally use at home	80	87	80	93	91
Yes - have access and don't personally use at home	1	1	2	1	1
No - do not have broadband access at home	19	12	18	6	8

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

(Base: All Household Decision Makers 18+, n= 2,010)

Plans to get broadband access next 12 months

Amongst those surveyed that do not currently have broadband access at home, 7% are thinking about getting broadband within the next year, of which, the highest proportion reside in Region 1 (least densely populated).



	REGION 1 (n=55)	REGION 2 (n=34)	REGION 3 (n=54)	REGION 4 (n=22)	REGION 5 (n=43)
Yes - Definitely	3	1	2	0	0
Yes - Maybe	16	10	2	0	7
No	66	82	86	90	85
Don’t know	15	7	11	10	8
Any Yes	**19**	**12**	**3**	**0**	**7**

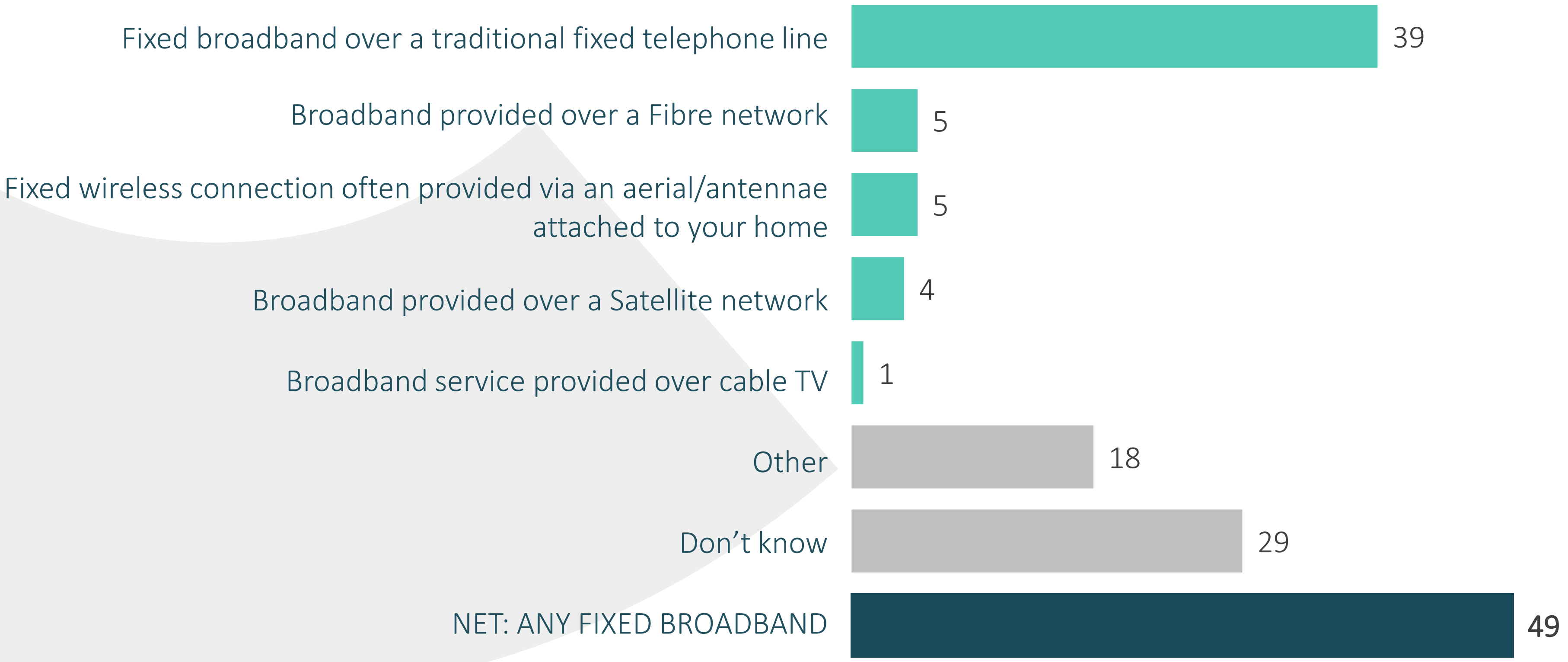
*Caution: Small Base Size

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

(Base: All Without Broadband Access At Home, n=208)

Type of Broadband Likely To Get (broadband intenders[1])

Of those intending to get broadband access, broadband via fixed telephone line is the most common intended choice.



Q.6 You mentioned that you and your household are planning on getting broadband in the next 12 months. What type of broadband are you most likely to get?

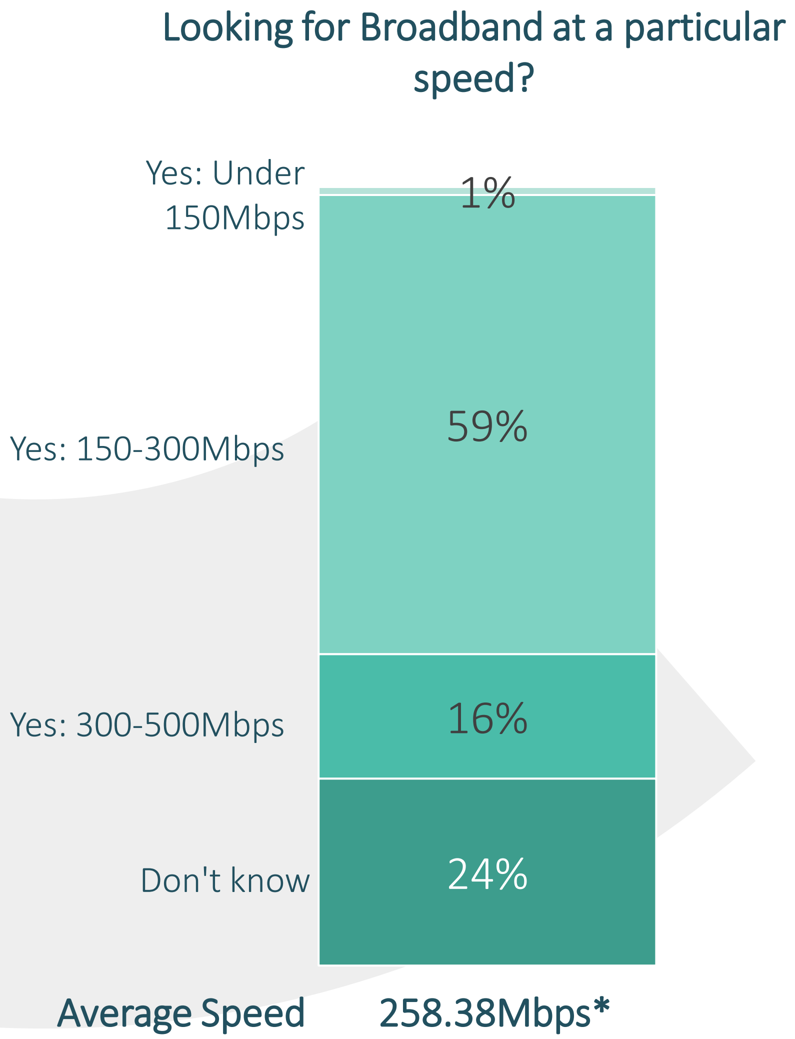
(Base: All Broadband Intenders, n=18)

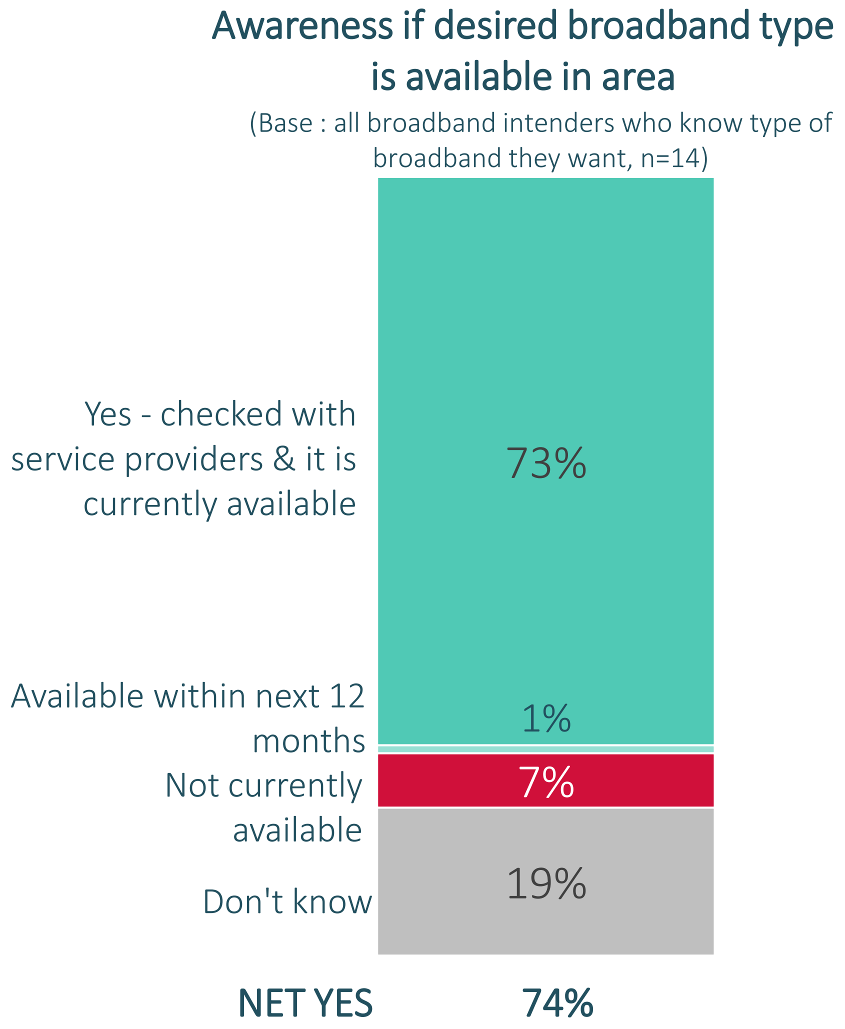
[1] Where 'broadband intenders' refers to all those who answered either 'definitely' or 'maybe' to getting broadband within the next year

*Caution: Small Base Size

Speed Of Broadband Likely To Get – Broadband Intenders

Majority of broadband intenders are looking for broadband speeds in the range of 150-300Mbps





Q.6b In terms of the broadband service that you are most likely to get, are you looking for a broadband service at a particular speed? and Q7 You mentioned that you and your household are planning on getting broadband at home in the next 12 months. Are you aware if this type of broadband is currently available in your area or will it be available in the next 12 months?

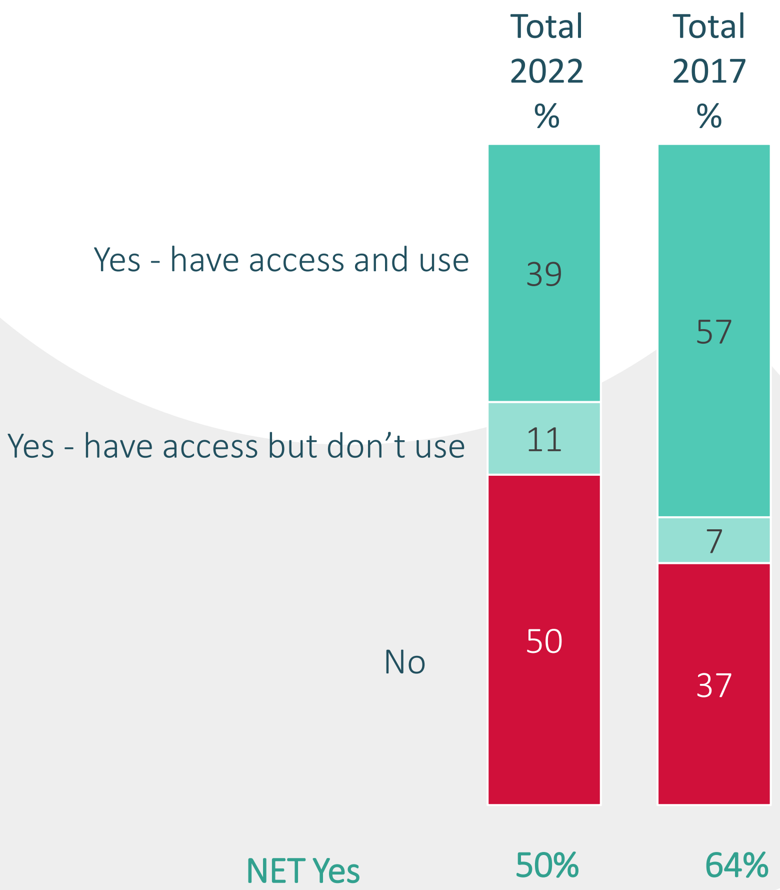
(Base: All Broadband Intenders, n=18)

*Caution: Small Base Size

Incidence of home phone and mobile phone ownership

39% have access *and use* a home phone, down from 57% in 2017.

Home Phone Ownership

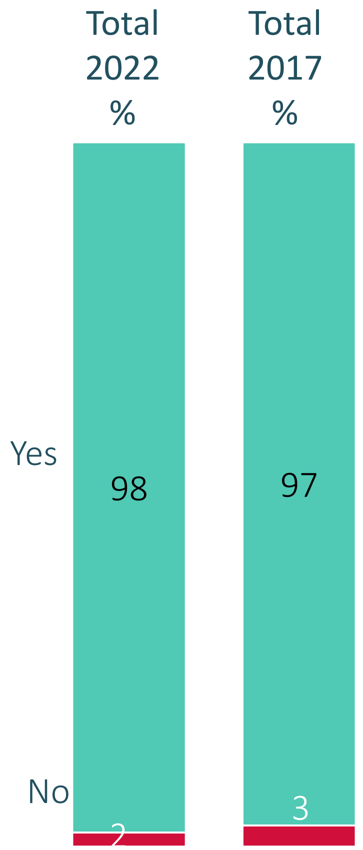


( ) Figures in brackets denote 2017 data, n=1,800

Q.1 Do you or your household own a home phone?

(Base: All Household Decision Makers 18+ , n= 2,010)

Mobile Phone Ownership



Q.3 Do you personally own a mobile phone?

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

3.

Broadband Access and Usage

Single most common means of accessing broadband at home

Fixed broadband via fibre is the single most common means of accessing broadband at home.

	Most Often Access %	2017 (n=1616) %	REGION 1 (n=248) %	REGION 2 (n=317) %	REGION 3 (n=296) %	REGION 4 (n=330) %	REGION 5 (n=610) %	Dublin (n=396) %	Rest of Leinster (n=473) %	Munster (n=475) %	Conn/ Ulster (n=457) %
Broadband provided over a Fibre network	40	19	18	34	38	55	40	41	59	23	36
Fixed broadband over a traditional fixed telephone line	22	42	46	31	32	26	17	9	21	34	27
Broadband service provided over a cable TV	22	21	4	3	1	2	33	47	2	18	14
Internet access over Mobile Phone using 3G/4G/5G data package	5	1	5	7	7	4	4	0	7	5	10
Mobile Broadband	5	8	9	8	7	5	4	2	5	9	5
Broadband provided over a Satellite network	3	2	13	9	6	2	1	0	2	4	5
Fixed wireless connection often provided via an aerial/antennae attached to your home	3	2	4	6	6	5	1	-	3	6	3
Other	1	1	1	1	3	1	1	1	2	-	1
NET: ANY FIXED BROADBAND	84	82	68	68	71	83	90	97	82	75	77

Q.8/9 Which means of accessing broadband do you and your household use **most often when at home**?

(Base: All With Broadband Access At Home, n=1801)

What is primary broadband used for?

Browsing the internet and using email are the main uses of broadband access

	Any Access %	2017 (n=1616) %	ComReg Region: REGION 1 (n=248) %	REGION 2 (n=317) %	REGION 3 (n=296) %	REGION 4 (n=330) %	REGION 5 (n=610) %	Region: Dublin (n=396) %	Rest of Leinster (n=473) %	Munster (n=475) %	Conn/ Ulster (n=457) %
Browsing the internet	85	92	86	92	85	86	83	82	89	79	92
Using email	79	59	82	82	82	81	78	77	87	73	81
Purchasing goods/services	63	50	75	76	72	77	57	42	77	63	82
Manage Banking/Pay Bills/Other Services	62	45	75	74	70	72	57	52	72	61	69
Using Social Media (e.g. Facebook, Twitter, LinkedIn)	59	59	69	63	61	69	57	48	68	57	71
Using Instant Messaging	58	-	64	63	52	68	57	55	54	61	66
Downloading/streaming movies music/ TV programmes or Catch Up TV Services	58	35	58	57	61	64	56	51	73	56	49
Watching live TV	56	-	54	58	53	59	56	53	74	46	51
Using real time video/voice calling (e.g. Skype, Viber, Facetime)	48	39	55	51	37	53	48	53	37	46	57
Working from home/remote working	35	20	46	47	33	41	32	37	43	29	28
Gaming or interactive gaming (e.g. Xbox, PlayStation)	32	22	38	38	36	38	29	20	42	33	36
Study/College from home	24	14	27	29	26	28	21	20	22	21	36

Q12. What is your primary broadband access used for?

(Base: All wiith Broadband access at home, n=1,801)

What is primary broadband used for?

There is evidence of broadband being used differently depending on the underlying technology. Fibre based broadband stands out as typically being used for higher bandwidth activities.

Primary Means of Accessing Broadband

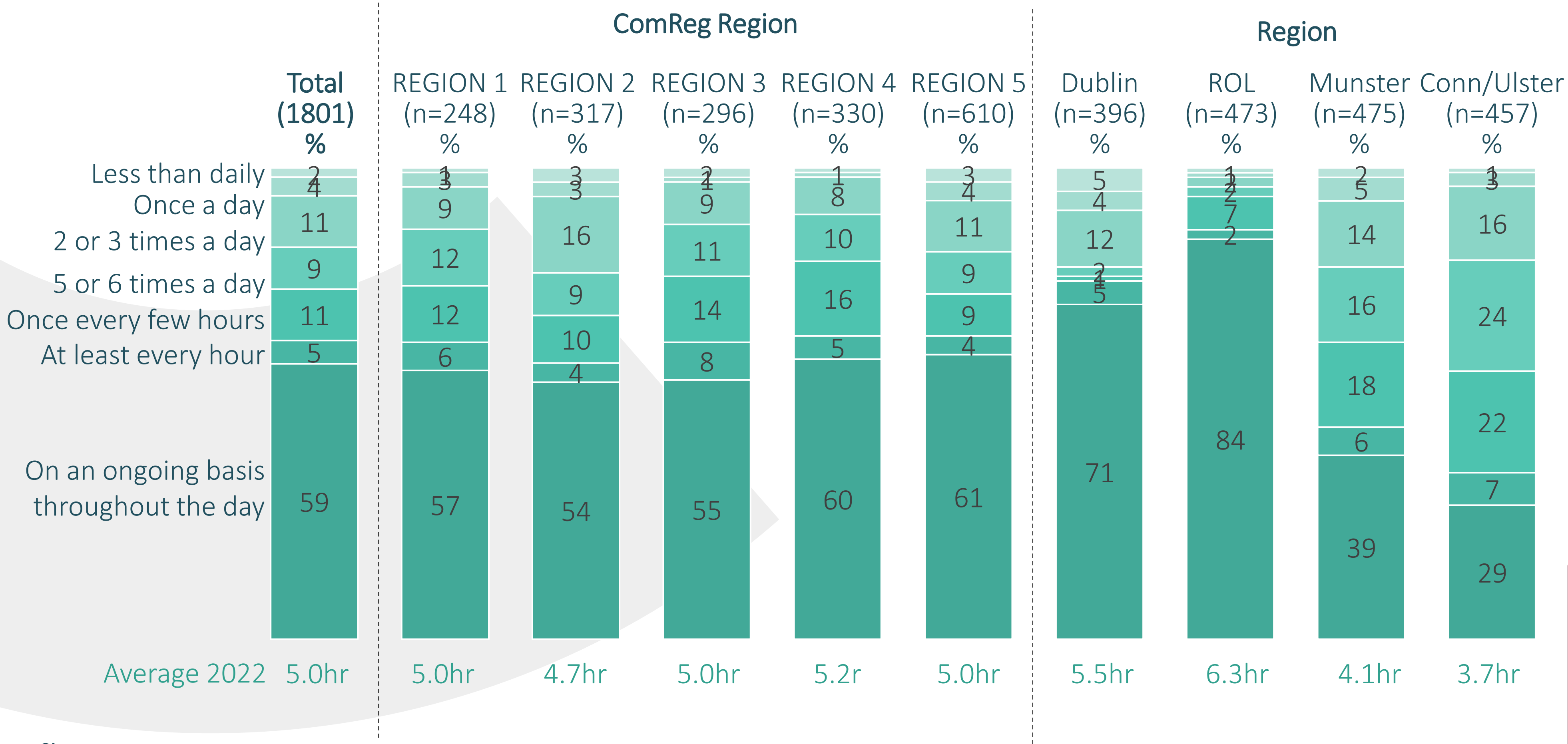
	TOTAL %	2017 (n=1616) %	Traditional Phone (n=487) %	Cable Network (n=262) %	Fibre Network (n=693) %	Mobile broadband (n=102) %	Other broadband (n=257) %
Browsing the internet	85	92	86	79	87	77	89
Using email	79	59	86	73	82	80	71
Purchasing goods/services	63	50	66	49	69	59	68
Manage Banking/Pay Bills/Other Services	62	45	67	54	66	49	61
Using Social Media (e.g. Facebook, Twitter, LinkedIn)	59	59	58	53	63	51	69
Using Instant Messaging	58	-	46	65	60	59	60
Downloading/streaming movies music/ TV programmes or Catch Up TV Services	58	35	53	55	66	49	48
Watching live TV	56	-	54	54	63	49	45
Using real time video/voice calling (e.g. Skype, Viber, Facetime)	48	39	45	58	47	38	38
Working from home/remote working	35	20	34	29	41	22	31
Gaming or interactive gaming (e.g. Xbox, Play Station)	32	22	29	25	38	35	30
Study/College from home	24	14	22	23	26	19	21

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

(Base: All With Broadband Access At Home, n=1801)

How often households access the internet

According to this survey, the average household accesses the internet for 5 hours per day, a figure which is higher in Rest of Leinster, at 6.3 hours per day



NB: 'Average' refers to the average number of hours spent per household and are rounded to one decimal place

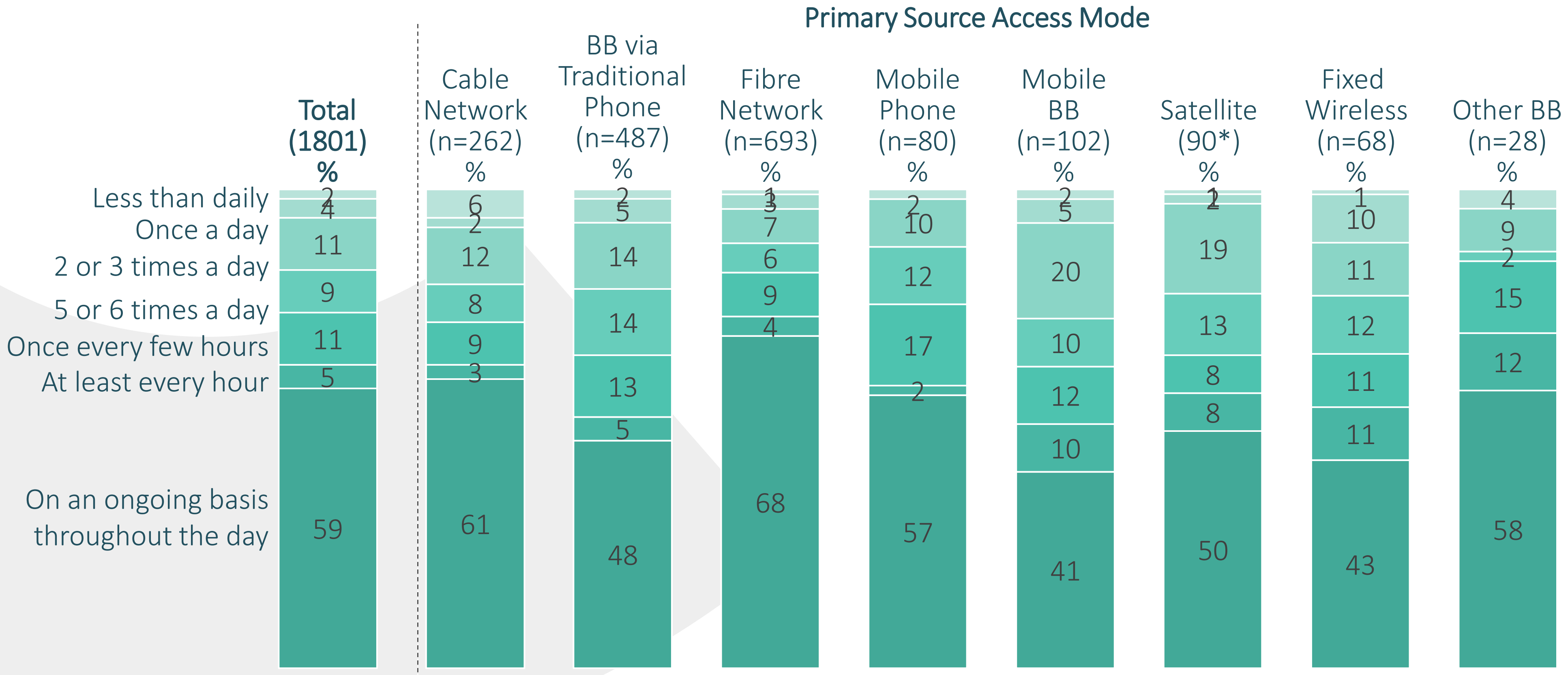
*Caution: Small Base Size

Q.11 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....

(Base: All Using Primary Access Mode; n=1801)

How often households access the internet

Households accessing broadband via fibre and cable tend to spend longer time on the internet than other access types



	Total	Cable Network	BB via Traditional Phone	Fibre Network	Mobile Phone	Mobile BB	Satellite	Fixed Wireless	Other BB
Average 2022	5.0hr	5.0hr	4.5hr	5.5hr	5.0hr	4.3hr	4.7hr	4.4hr	5.4hr
Average 2017	4.6hr	4.4hr	4.8hr	4.9hr	2.9hr	3.3hr	4.7hr	4.6hr	-

Note: Averages refer to average number of hours spent per household and are rounded to one decimal place

*Caution: Small Base Size

Q.11 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….

(Base: All Using Primary Access Mode; n=1801)

Most Important Characteristics of Broadband Service

Reliability is the most important aspect of broadband service – this is particularly the case for those accessing broadband via traditional phone line.

	Total %	BB Trad Phone (n=487) %	Cable Network (n=262) %	Fibre Network (n=693) %	Mobile BB (n=102) %	Other BB (n=257) %
Reliability	83	91	76	83	75	83
Download speed	41	48	37	38	40	47
Customer service	30	35	31	28	31	25
Speed of repair	23	21	24	24	23	17

Q.12b Which of the following are the most important characteristics to you of your broadband service?

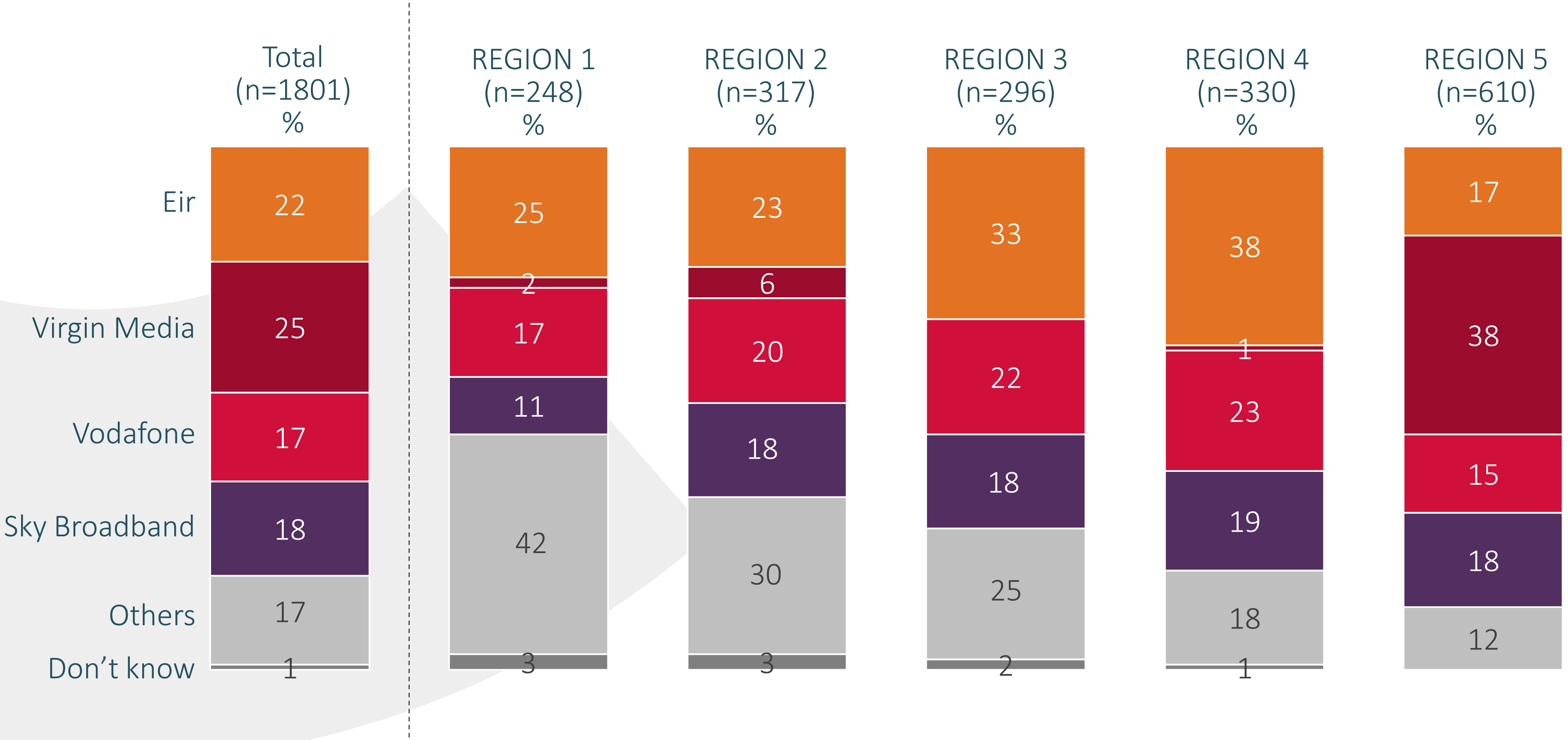
(Base: All Respondents Who have Broadband Access At Home, n=1801)

4.

Suppliers of Broadband

Current primary access broadband supplier

According to the survey, Virgin Media has a 25% share of the primary access broadband market, growing to 38% in the more populated parts of the country.

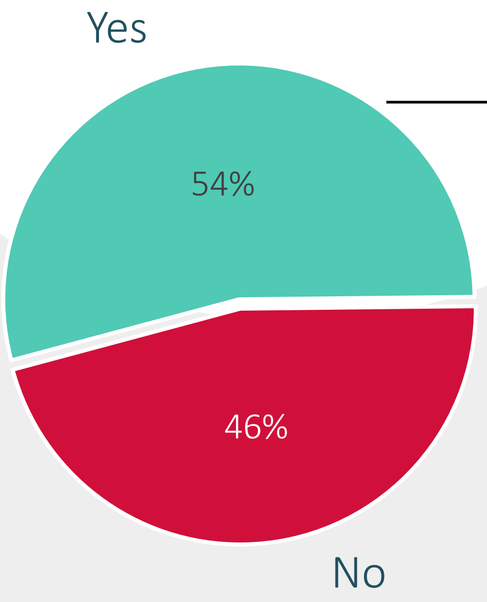


Q.13 You mentioned earlier that you had broadband access provided over ….. What company do you currently use as your main home broadband provider?

(Base: All With Broadband Access; n=1801)

Awareness of National Broadband Ireland

54% of the national population have heard of National Broadband Ireland – a figure which rises in rural areas.



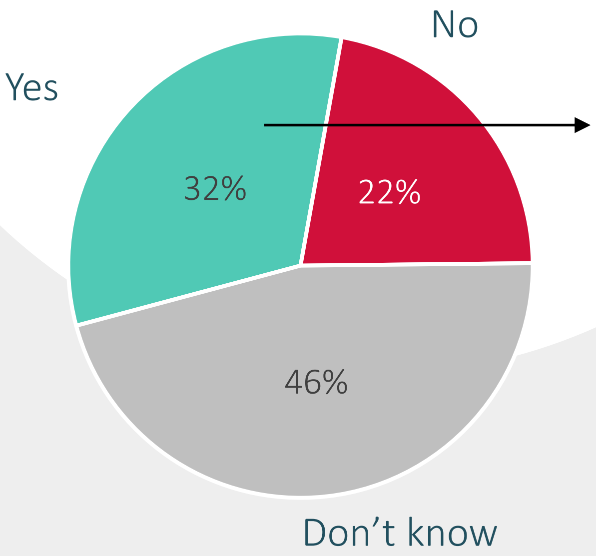
	ComReg Region					Region			
	REGION 1 (n=303)	REGION 2 (n=351)	REGION 3 (n=350)	REGION 4 (n=352)	REGION 5 (n=654)	DUBLIN (n=399)	REST OF LEINSTER (n=512)	MUNSTER (n=572)	CONN /ULSTER (n=527)
Yes	60%	64%	61%	60%	49%	42%	48%	56%	76%

Q.14b Have you heard of National Broadband Ireland (NBI), which has been contracted by the State to deliver the National Broadband Plan (NBP)?

(Base: All Without Broadband Access At Home, n= 2,010)

Knowledge of premises falling within the NBP Intervention Area

Those in the least populated areas of the country are most likely to be aware of the fact they are in the Intervention Area.



	ComReg Region					Region			
	REGION 1 (n=184)	REGION 2 (n=233)	REGION 3 (n=233)	REGION 4 (n=233)	REGION 5 (n=314)	DUBLIN (n=173)	REST OF LEINSTER (n=271)	MUNSTER (n=374)	CONN /ULSTER (n=369)
Yes	40%	40%	28%	42%	28%	23%	20%	40%	40%

Q.14 c Do you know if your premises is in the NBP Intervention Area – that is, that NBI will build a broadband network passing your premises?

(Base: All aware of NBP, n=1187)

5.

Bundling of Broadband, Contracts and Cost

Bundle incidence of broadband service

62% of those with access to broadband at home have their broadband service bundled with at least one other service. The incidence of bundling is highest in Dublin, at 71%.

	Total %	2017 (n=1616) %	ComReg Region: REGION 1 (n=248) %	REGION 2 (n=317) %	REGION 3 (n=296) %	REGION 4 (n=330) %	REGION 5 (n=610) %	Region: DUBLIN (n=396) %	REST OF LEINSTER (n=473) %	MUNSTER (n=475) %	CONN /ULSTER (n=457) %
I receive a single bill that includes at least one of the other services I have	62	60	63	63	58	63	62	71	61	50	65
Separate bill with other services from different provider	16	19	20	20	19	22	14	-	30	16	23
I only have broadband	13	10	9	12	16	13	12	8	6	27	9
Separate bill with other services from same provider	3	8	5	5	6	2	2	3	2	4	2
Don't know	6	3	2	-	2	0	9	17	-	3	1
NET: Non Bundle	32%	37%	34%	36%	41%	37%	28%	12%	39%	47%	34%

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

(Base: All Respondents Who have Broadband Access At Home, n=1801)

Bundle incidence of broadband service

Bundling is highest amongst those with a broadband delivered over a traditional phone line, at 69%.

	Total %	2017 (n=1616) %	BB Trad Phone (n=487) %	Cable Network (n=262) %	Fibre Network (n=693) %	Mobile BB (n=102) %	Other BB (n=257) %
I receive a single bill that includes at least one of the other services I have	62	60	69	68	66	14	41
Separate bill with other services from different provider	16	19	15	5	16	33	31
I only have broadband	13	10	10	8	10	50	23
Separate bill with other services from same provider	3	8	5	2	3	2	3
Don't know	6	3	1	17	5	1	2
NET: Non Bundle	32%	37%	29%	15%	29%	86%	57%

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

(Base: All Respondents Who have Broadband Access At Home, n=1801)

Bundle incidence of broadband service

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

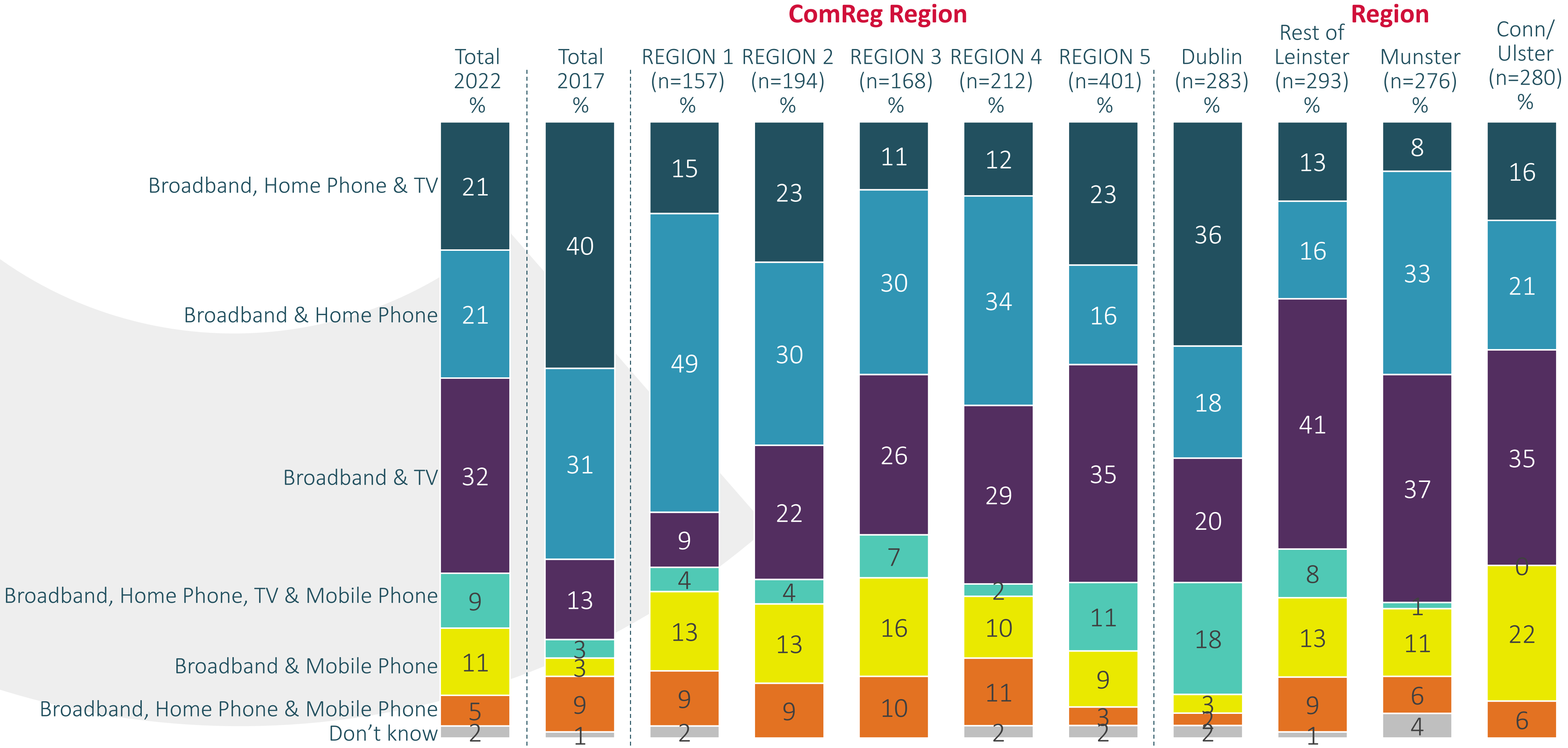
	Total %	2017 (n=1616) %	Eir (n=463) %	Sky (n=320) %	Virgin Media (n=296) %	Vodafone (n=393) %
I receive a single bill that includes at least one of the other services I have	62	60	75	78	68	47
Separate bill with other services from different provider	16	19	14	1	6	33
I only have broadband	13	10	8	4	9	15
Separate bill with other services from same provider	3	8	2	5	2	5
Don't know	6	3	1	12	15	1
NET: Non Bundle	32%	37%	24%	10%	17%	52%

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

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

Bundle Type

The most popular bundle amongst those surveyed is Broadband & TV (32%), growing to 41% in Rest of Leinster. A triple play bundle of Broadband, Home Phone and TV is less popular than in 2017 and in general there is a lower incidence of bundles with a home phone component.

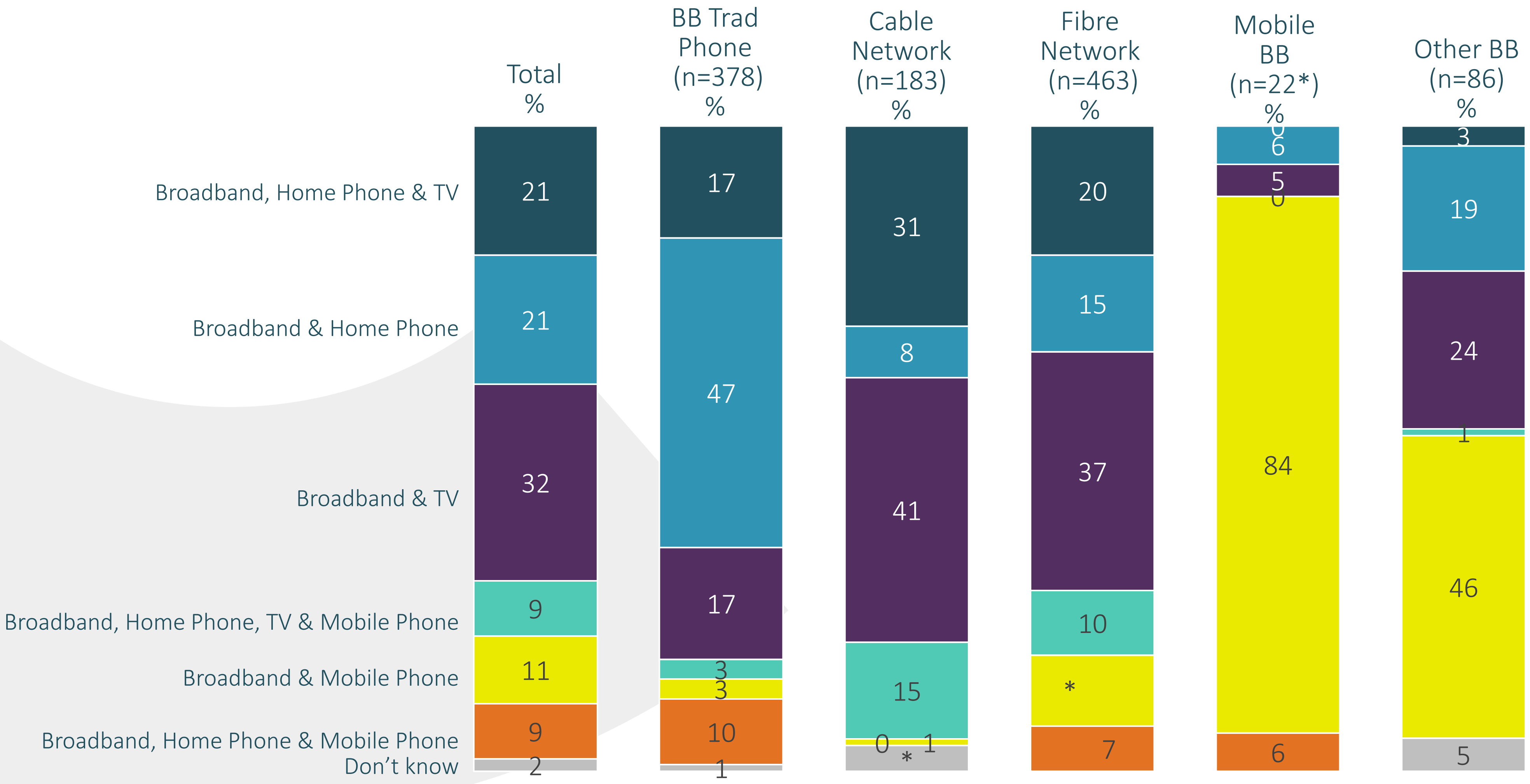


Q.16 Including your broadband services, which of the following services are also included on your single bill?

(Base: All Decision Makers With Broadband Access In A Bundle n=1132)

Bundle Type by Access Mode

Incidence of dual play Broadband and TV highest among those with cable broadband access.

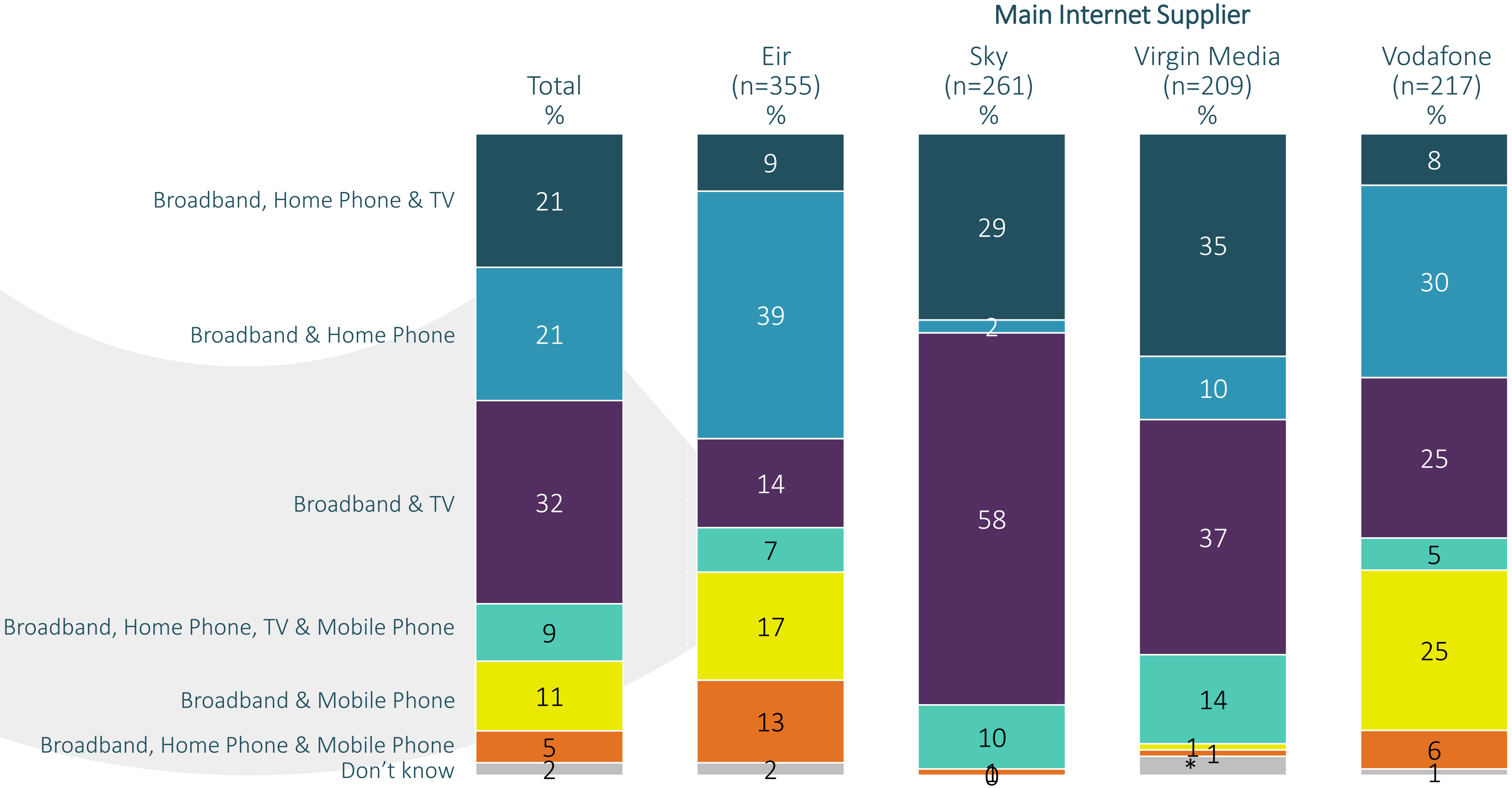


Q.16 Including your broadband services, which of the following services are also included on your single bill?

(Base: All Decision Makers With Broadband Access In A Bundle n=1132)

Bundle Type by Supplier

Bundle type held is dependant on who main supplier of internet service is with significantly difference in bundle composition via the main market suppliers.

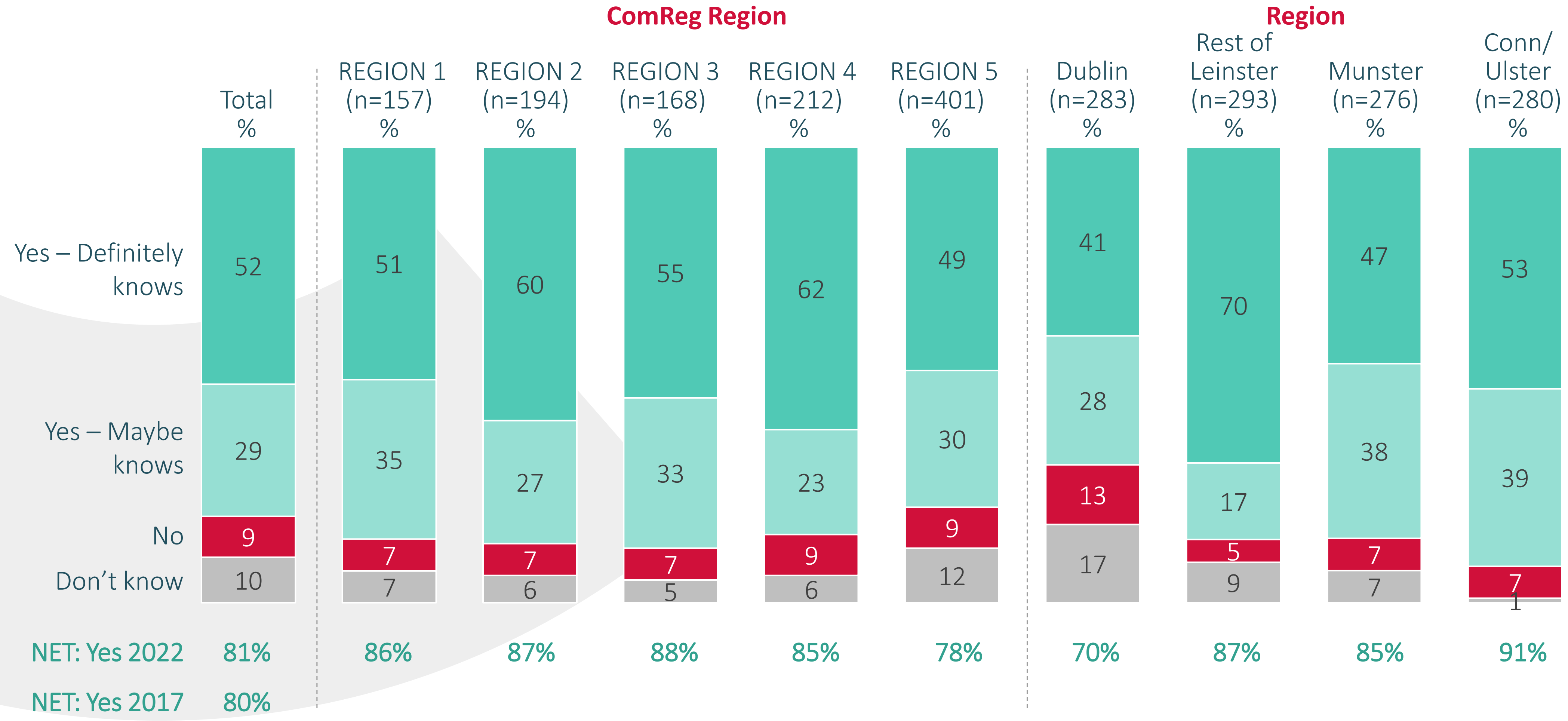


Q.16 Including your broadband services, which of the following services are also included on your single bill?

(Base: All Decision Makers With Broadband Access In A Bundle n=1132)

Knowledge of Broadband Bundle Cost

52% of bundle owners claim that they definitely know how much they pay for their bundle service on a monthly basis.

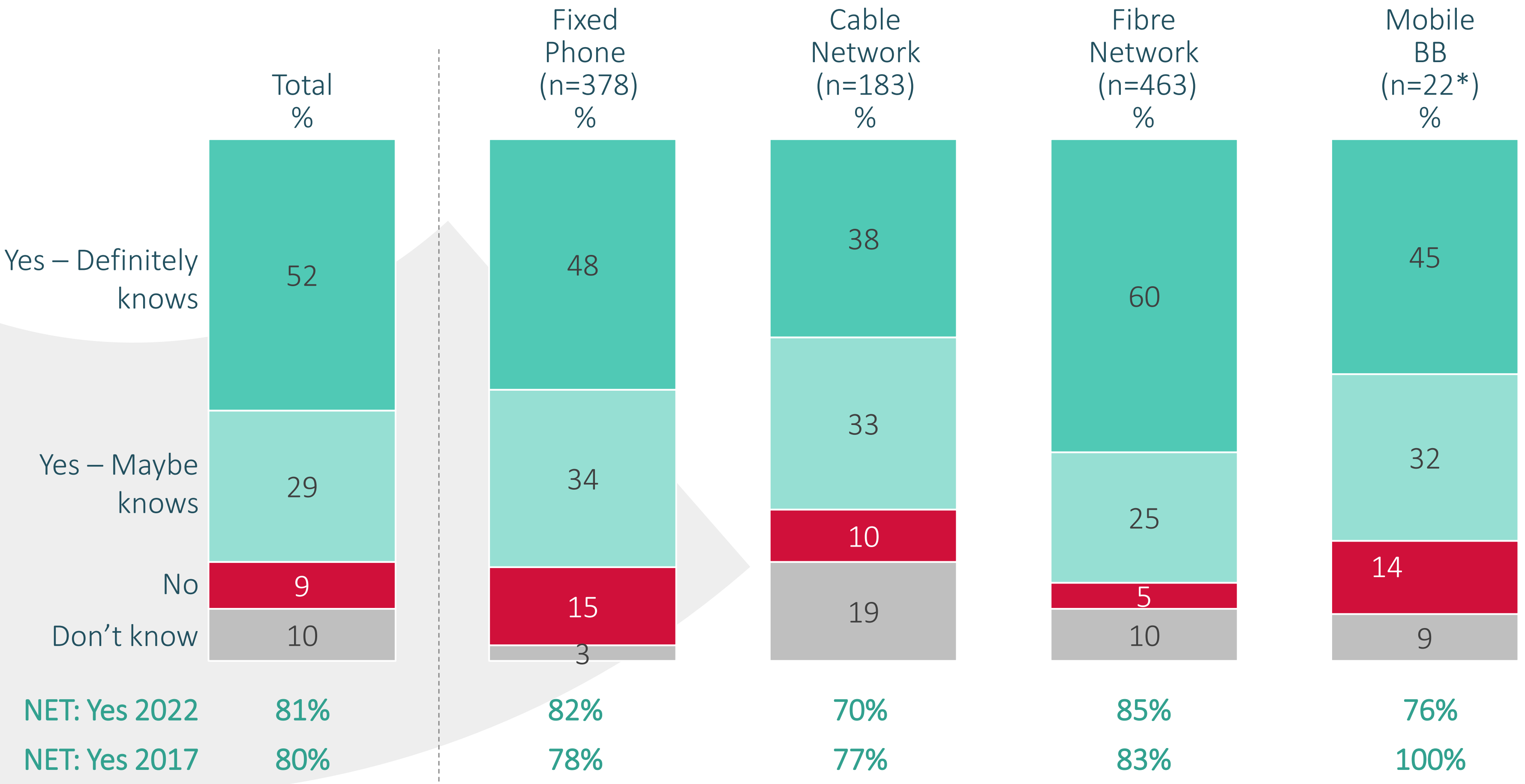


Q.17 Do you know how much you pay for your bundled service on a monthly basis?

(Base: All With Broadband Access who know the bundle type they have, n=1132)

Knowledge of Broadband Bundle Cost

Those accessing broadband via a cable network are least likely to claim they know bundle cost

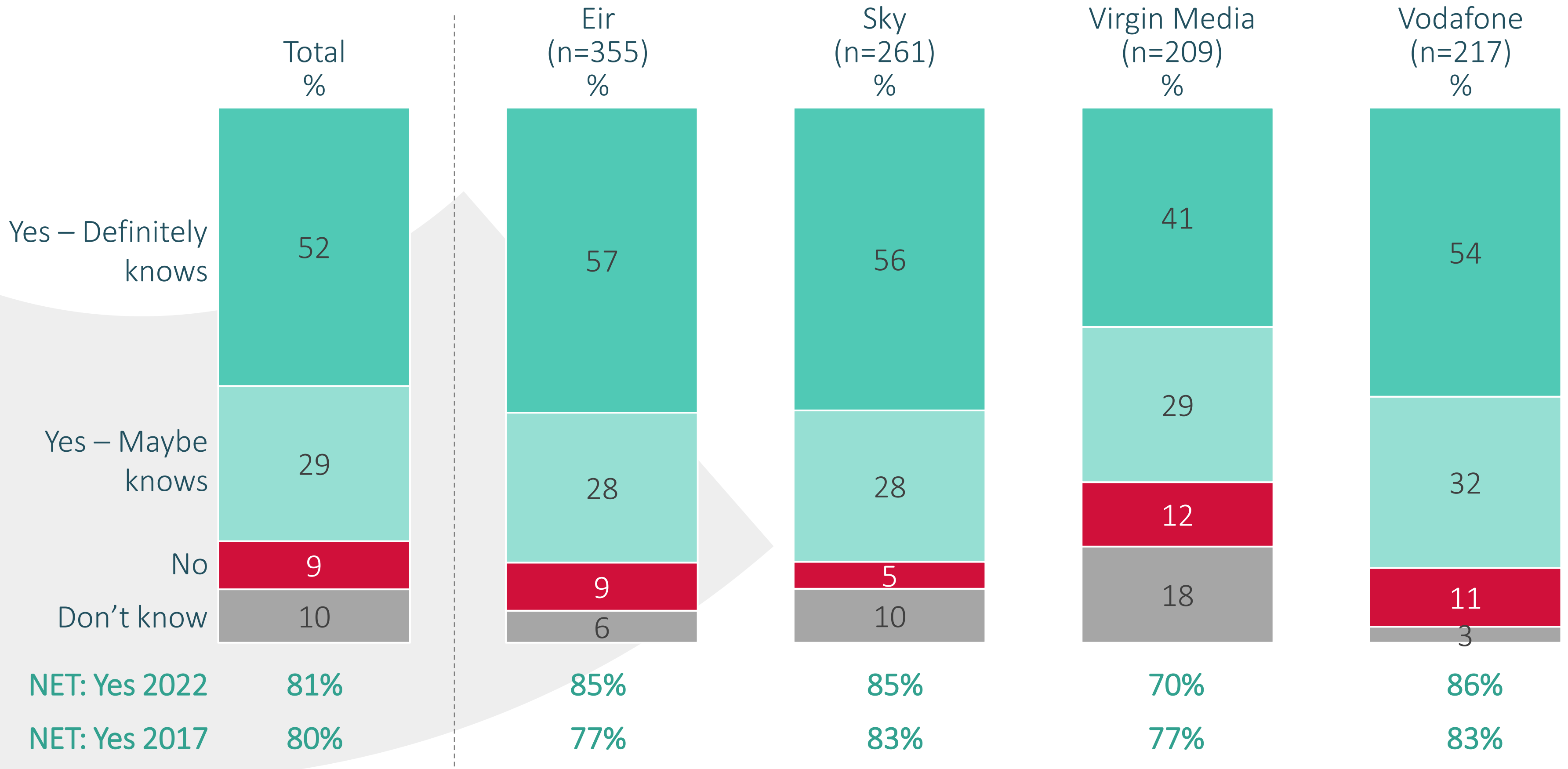


Q.17 Do you know how much you pay for your bundled service on a monthly basis?

(Base: All With Broadband Access who know the bundle type they have, n=1132)

Knowledge of Broadband Bundle Cost per month

Awareness of broadband bundle cost is slightly higher amongst Eir customers (57%)

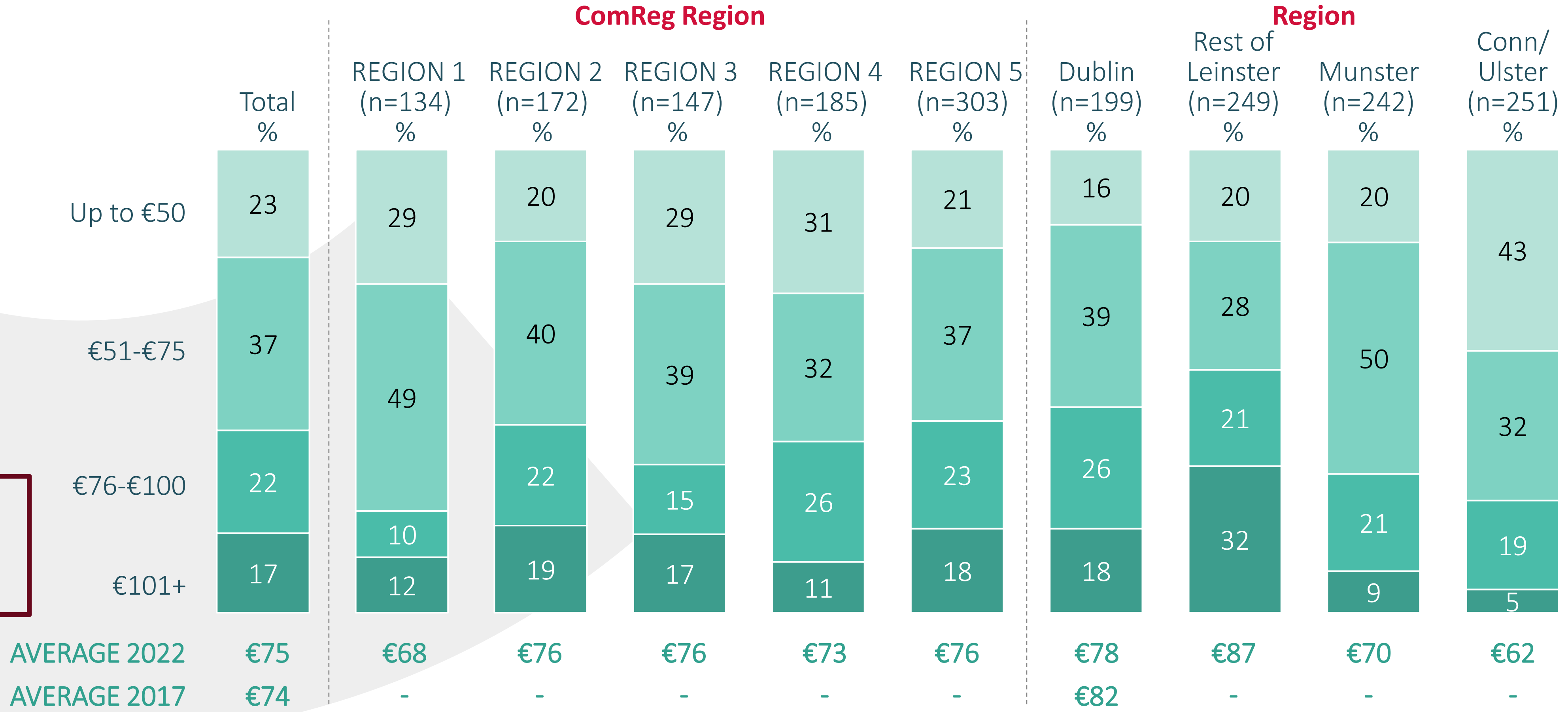


Q.17 Do you know how much you pay for your bundled service on a monthly basis?

(Base: All With Broadband Access who know the bundle type they have, n=1132)

Typical Broadband Bundle spend per month

According to the survey, the average spend for bundle service per month is €75, growing to €87 amongst Rest of Leinster residents.



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

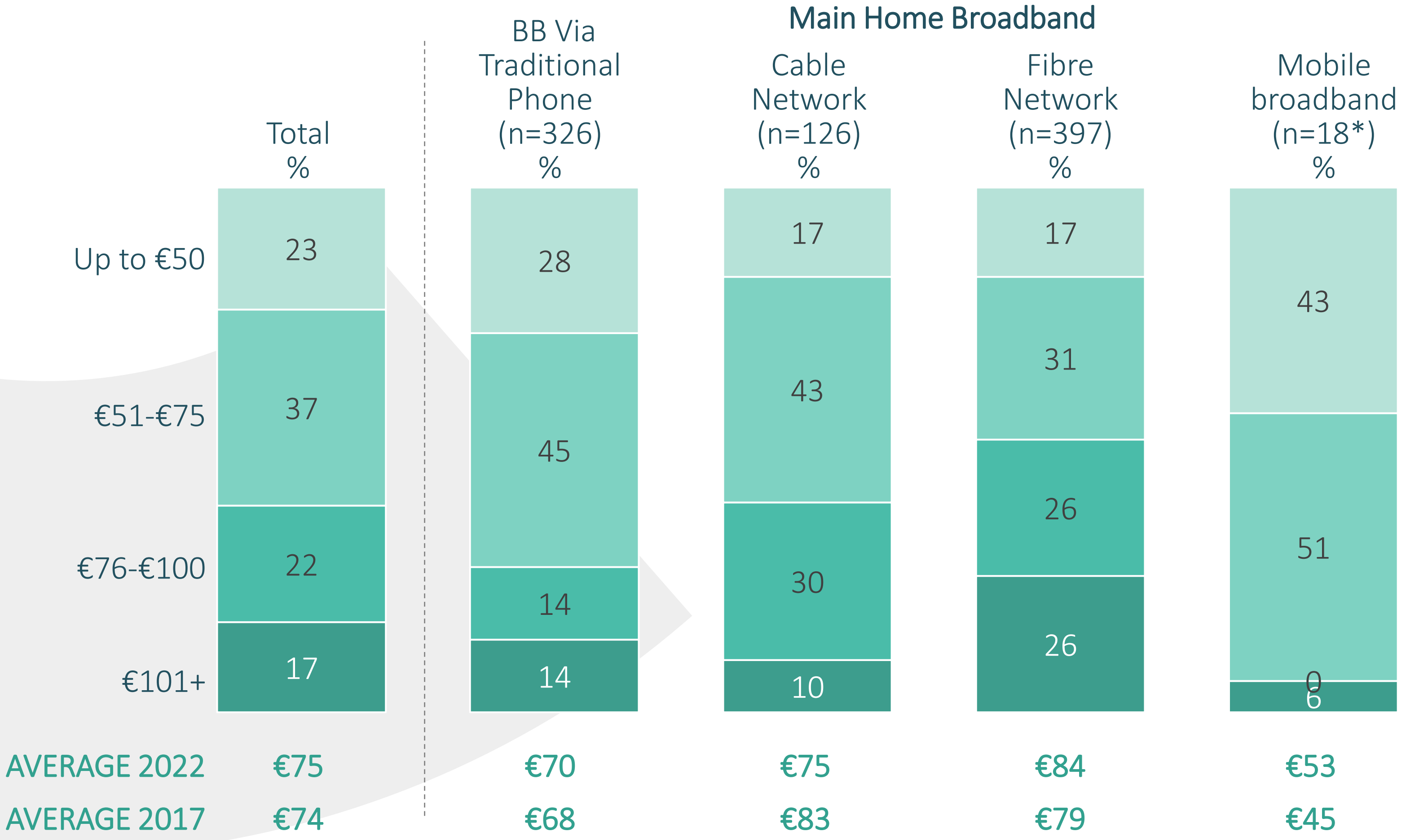
NOTE: this refers to overall spend on bundle per month, regardless of the bundle type.

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

(Base: All Definitely/Maybe Know Monthly Spend on Broadband Service, n=941)

Typical Broadband Bundle Spend Per Month by Platform

The highest average broadband bundle spend per month is amongst fibre users (€84 p/m).



Note: Average refers to average spend per household and are rounded to nearest Euro

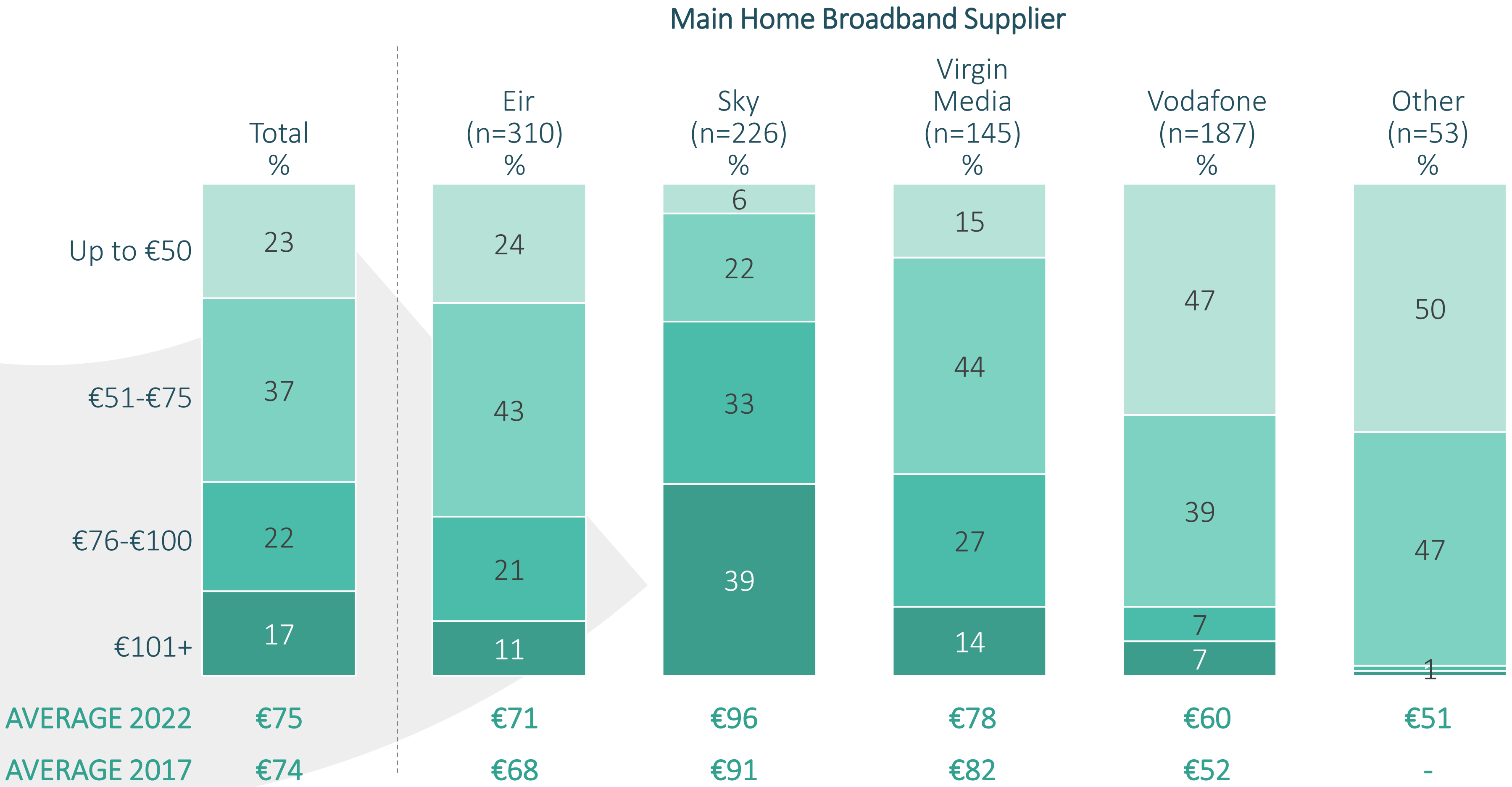
NOTE: this refers to overall spend on bundle per month, regardless of the bundle type.

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

(Base: All Definitely/Maybe Know Monthly Spend on Broadband Service, n=941)

Typical Broadband Bundle Spend Per Month by Supplier

The average spend per month on bundle is €75 with difference in average spend per month via main 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.

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

(Base: All Definitely/Maybe Know Monthly Spend on Broadband Service, n=941)

Most Important Aspect of Service within Broadband Bundles

Broadband is seen as the most important aspect of bundle, as was in the case in 2017

	Total % (n=1117)	2017 (n=966) %	Existing Bundle Type: BB, Home Ph + Mobile Ph (n=84) %	BB, Home Ph + TV (n=225) %	BB, Home Ph, TV & Mobile (n=83) %	BB + TV (n=276) %	BB + Mobile Phone (n=122) %	BB + Home Ph (n=327) %
Broadband	64	69	66	58	23	72	39	86
TV	9	18	0	20	8	13	0	0
Mobile Phone	4	4	9	0	6	0	26	0
Home Phone	3	7	8	2	4	0	0	6
No Preference	20	0	17	20	48	14	35	8

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

(Base: All Bundle Owners Who Know Bundle Type, n=1117)

Most Important Aspect of Service within Broadband Bundles

Residents in Conn/Ulster are most likely to state that broadband is the most important aspect of bundle.

	Total %	2017 (n=966) %	ComReg Region: REGION 1 (n=155) %	REGION 2 (n=194) %	REGION 3 (n=168) %	REGION 4 (n=208) %	REGION 5 (n=392) %	Region: DUBLIN (n=277) %	REST OF LEINSTER (n=290) %	MUNSTER (n=272) %	CONN /ULSTER (n=278) %
Broadband	64	69	54	60	66	73	63	58	63	69	72
TV	9	18	3	6	7	7	10	12	13	2	5
Mobile Phone	4	4	11	7	5	4	3	1	5	5	7
Home Phone	3	7	8	8	1	3	2	1	3	6	1

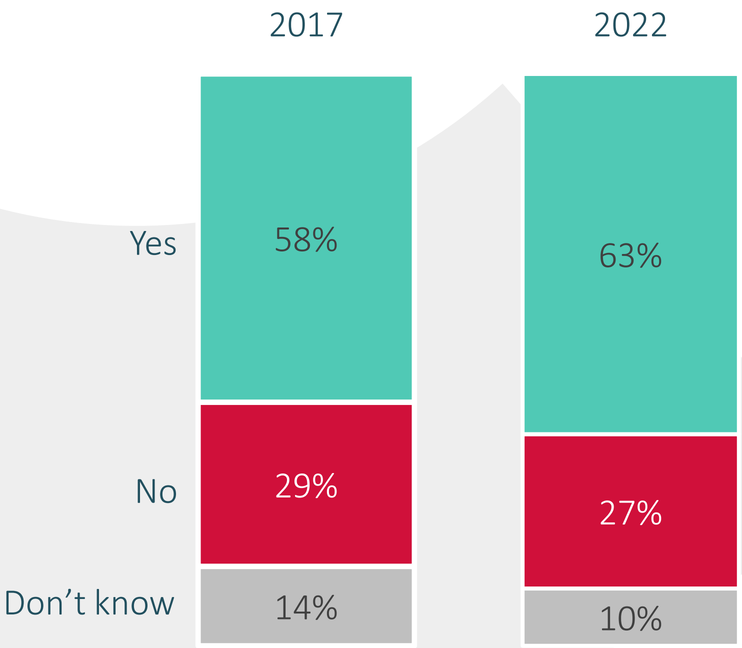
Q.19 Which service in the bundle/package you subscribe to is most important to you and your household?

(Base: All Bundle Owners Who Know Bundle Type, n=1117)

Whether currently in Contract with Broadband Service Provider

63% of those with broadband access are currently under contract with their service provider.

Total



Main Broadband Type

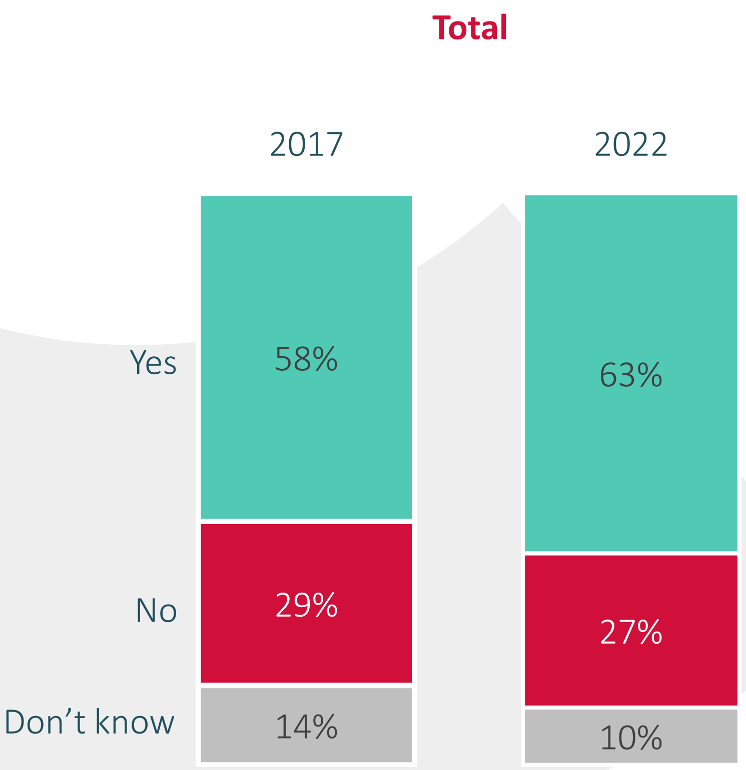
	BB via Traditional Phone (n=487) %	Cable Network (n=262) %	Fibre Network (n=693) %	Mobile broadband (n=102) %	Other BB (n=257) %
Yes	70	47	72	42	58
No	20	39	21	45	35
Don't know	10	15	7	13	7

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

(Base: All Respondents With Broadband Access n=1801)

Whether currently in Contract with Broadband Service Provider

Eir customers are most likely to be under contract with their provider.



Main Supplier

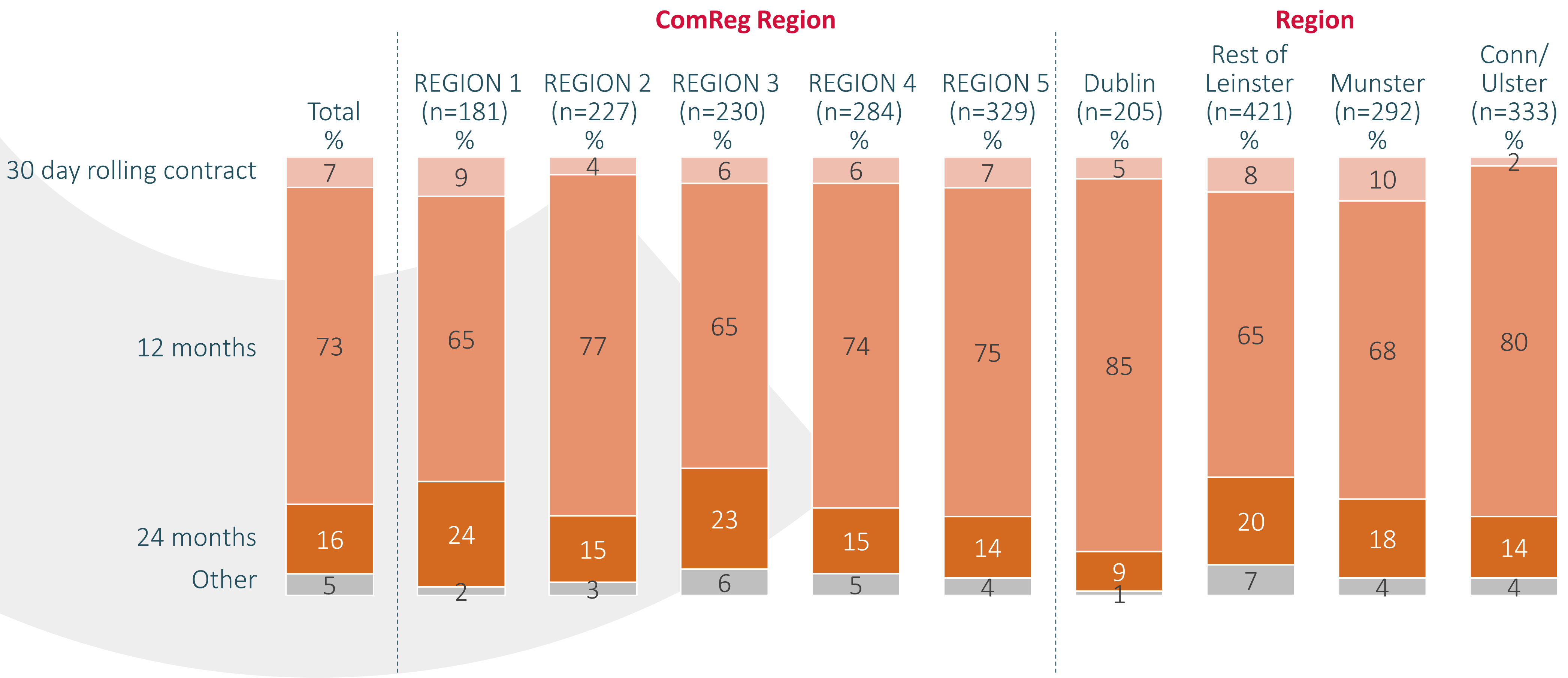
	Eir (n=463) %	Sky (n=320) %	Virgin Media (n=296) %	Vodafone (n=393) %
Yes	72	69	50	65
No	18	24	36	30
Don’t Know	10	7	15	5

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

(Base: All Respondents With Broadband Access n=1801)

Duration of Contract

73% of those under a contract are in a 12month contract, a figure which increases to 85% among Dublin residents.

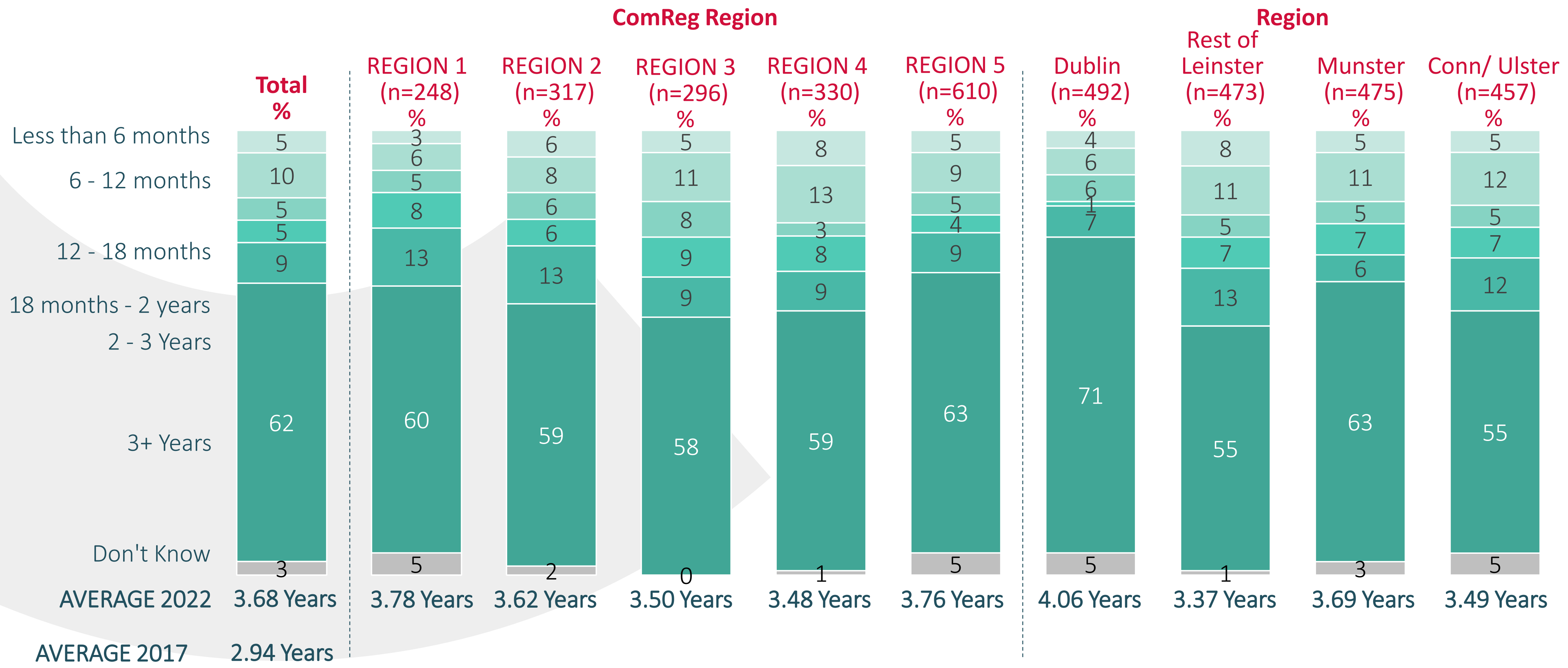


Q.20B What is the duration of this contract?

(Base: All Currently In Contract, n=1251)

Length of Time with Current Broadband Supplier

3.68 years is the average length of time with current broadband supplier – higher in Dublin at 4.06 years.



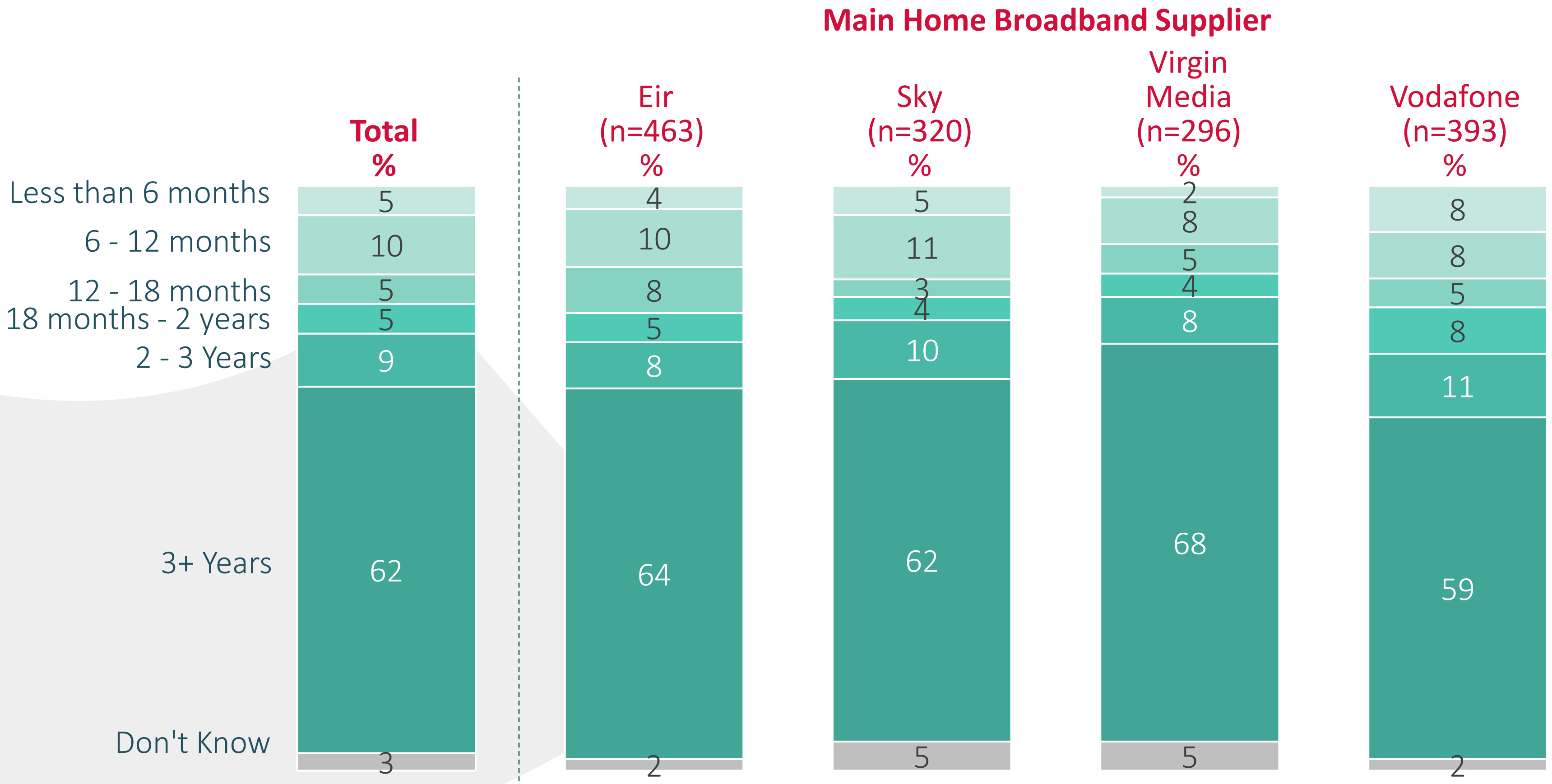
Q.21 How long have you and your household been with your current main broadband supplier for?

(Base: All Respondents With Broadband Access n=1801)

Note: Averages refer to average tenure per household

Length of Time with Current Broadband Supplier

Virgin Media customers are the most likely to have been with their current supplier for longer, at 4 years, on average.



	Total	Eir	Sky	Virgin Media	Vodafone
AVERAGE 2022	3.68 Years	3.74 Years	3.72 Years	4.00 Years	3.55 Years
AVERAGE 2017	2.94 Years	3.07 Years	2.72 Years	3.42 Years	2.48 Years

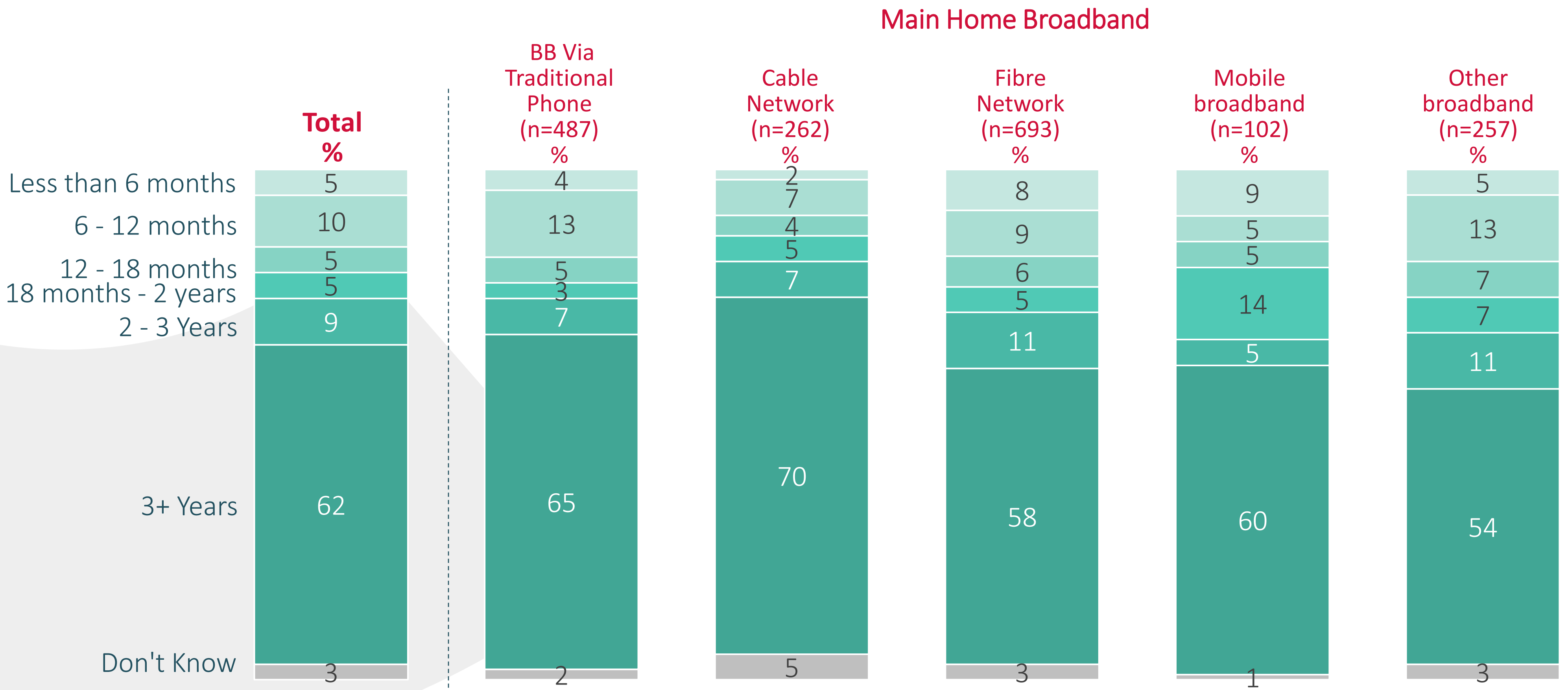
Note: Average refers to average tenure per household

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

(Base: All Respondents With Broadband Access n=1801)

Length of Time with Current Broadband Supplier

Those with cable broadband access are the most likely to stay with the same supplier, with their typical length of contract with their current provider averaging 4.08 years.



	Total	BB Via Traditional Phone	Cable Network	Fibre Network	Mobile broadband	Other broadband
AVERAGE 2022	3.68 Years	3.74 Years	4.08 Years	3.53 Years	3.57 Years	3.40 Years
AVERAGE 2017	2.94 Years	2.94 Years	3.53 Years	2.69 Years	2.15 Years	2.66 Years

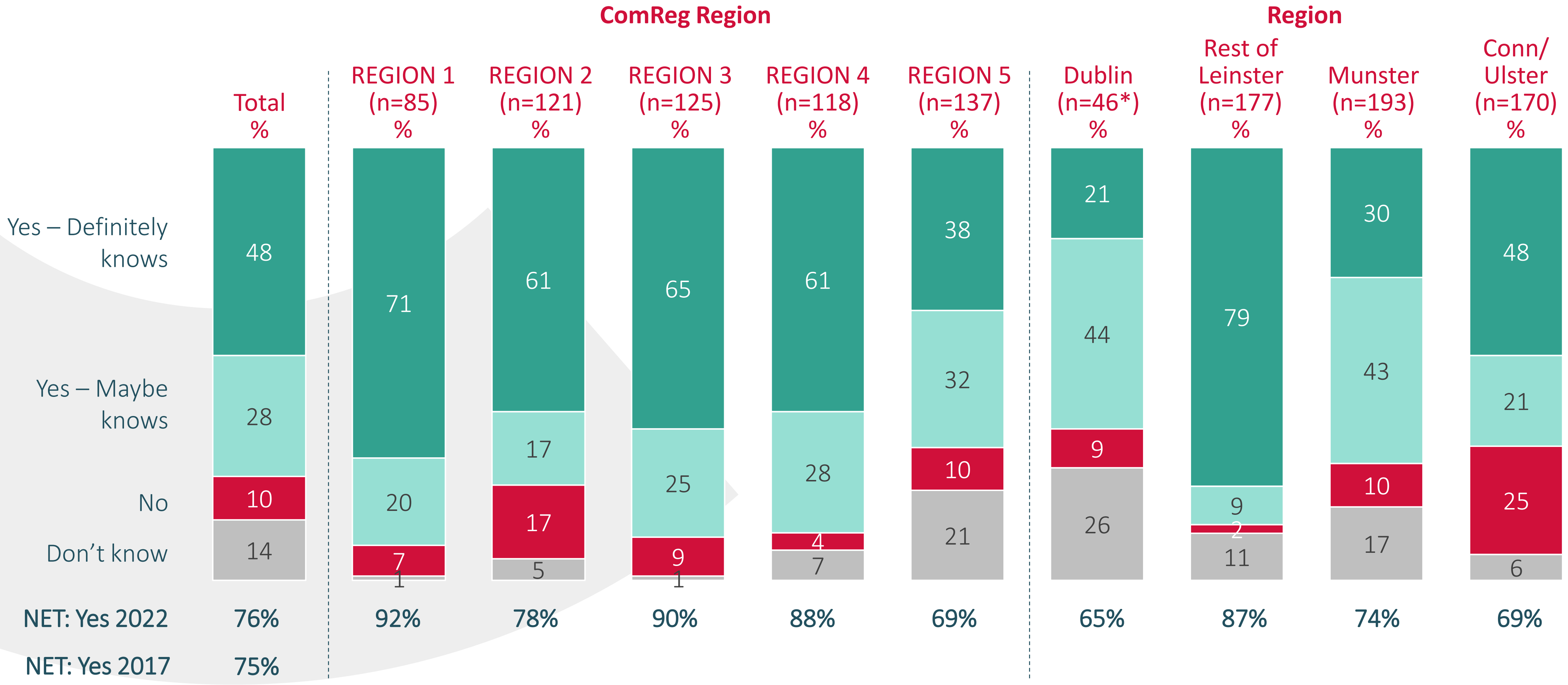
Note: Averages refer to average tenure per household

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

(Base: All Respondents With Broadband Access n=1801)

Knowledge of Broadband Cost (Non-Bundle)

76% of those with standalone broadband have a degree of confidence on its cost.



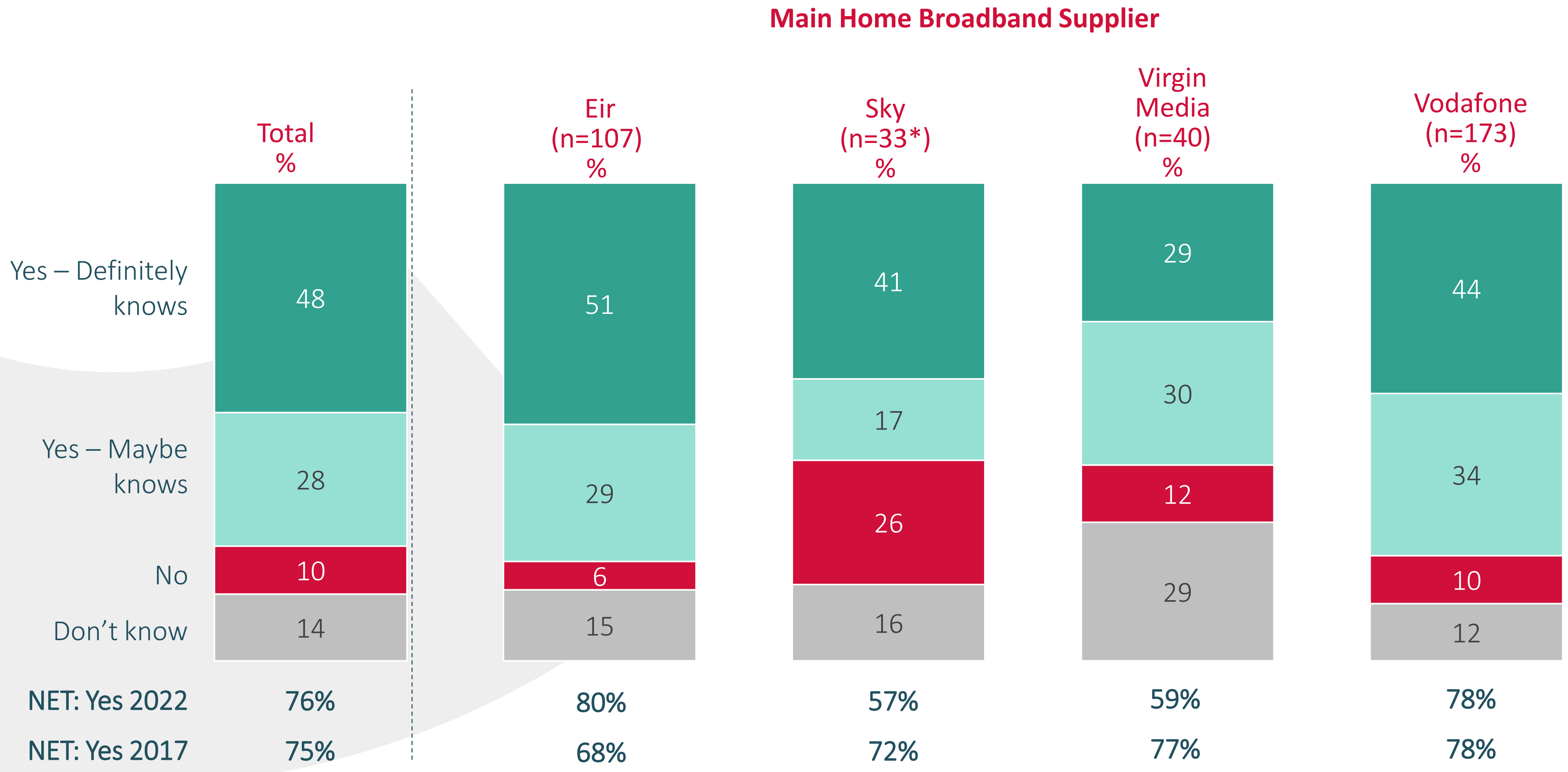
Q.22 Do you know how much you and your household pay for your broadband service on a monthly basis?

(Base: All With Broadband Access Non-Bundle, n=586)

*Caution: Small Base Size

Knowledge of Broadband Cost (Non Bundle) by Supplier

Claimed knowledge of standalone broadband cost is highest for Eir customers at 80%.



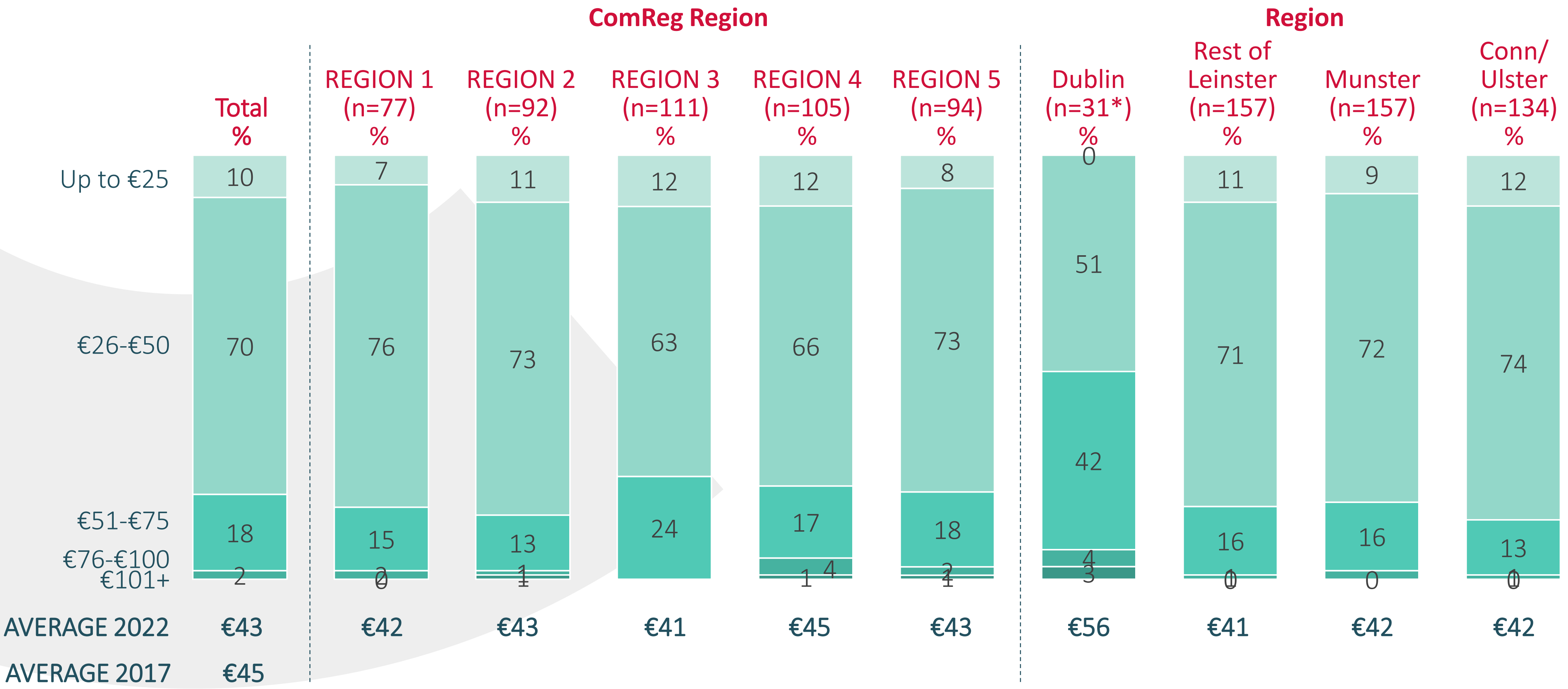
Q.22 Do you know how much you and your household pay for your broadband service on a monthly basis?

(Base: All With Broadband Access Non-Bundle, n=586)

*Caution: Small Base Size

Typical Broadband Spend Per Month (Non Bundle)

€43 is the typical spend per month on a broadband non bundle service.



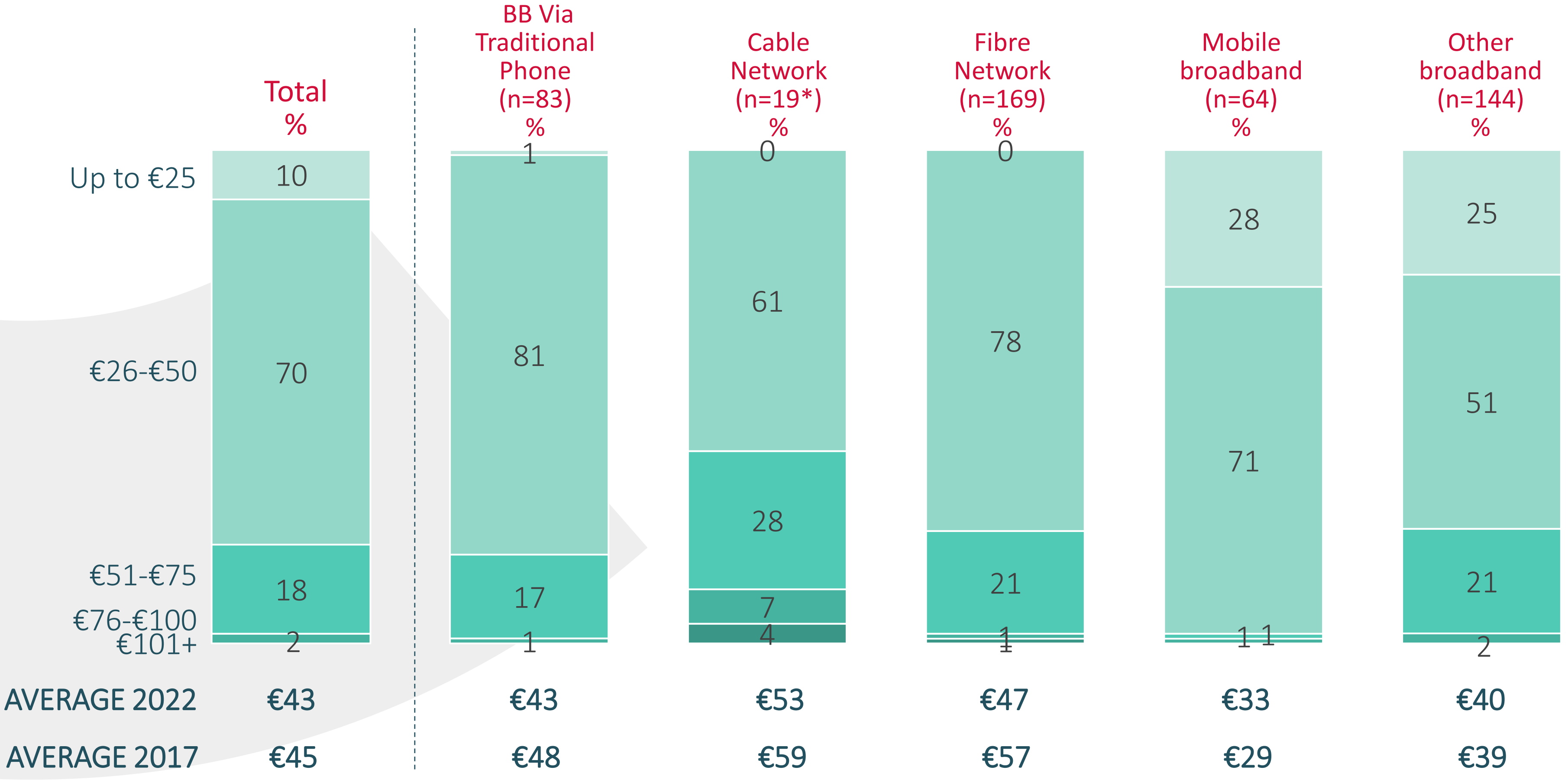
Q.23 How much do you and your household typically pay for broadband per month (excluding any promotional/introductory offers)?

(Base : All Definitely/Maybe Know Monthly Cost Of Broadband Service Non Bundle, n=479)

*Caution: Small Base Size

Typical Broadband Spend Per Month (Non Bundle)

Broadband spend tends to be higher among those with cable and fibre access.



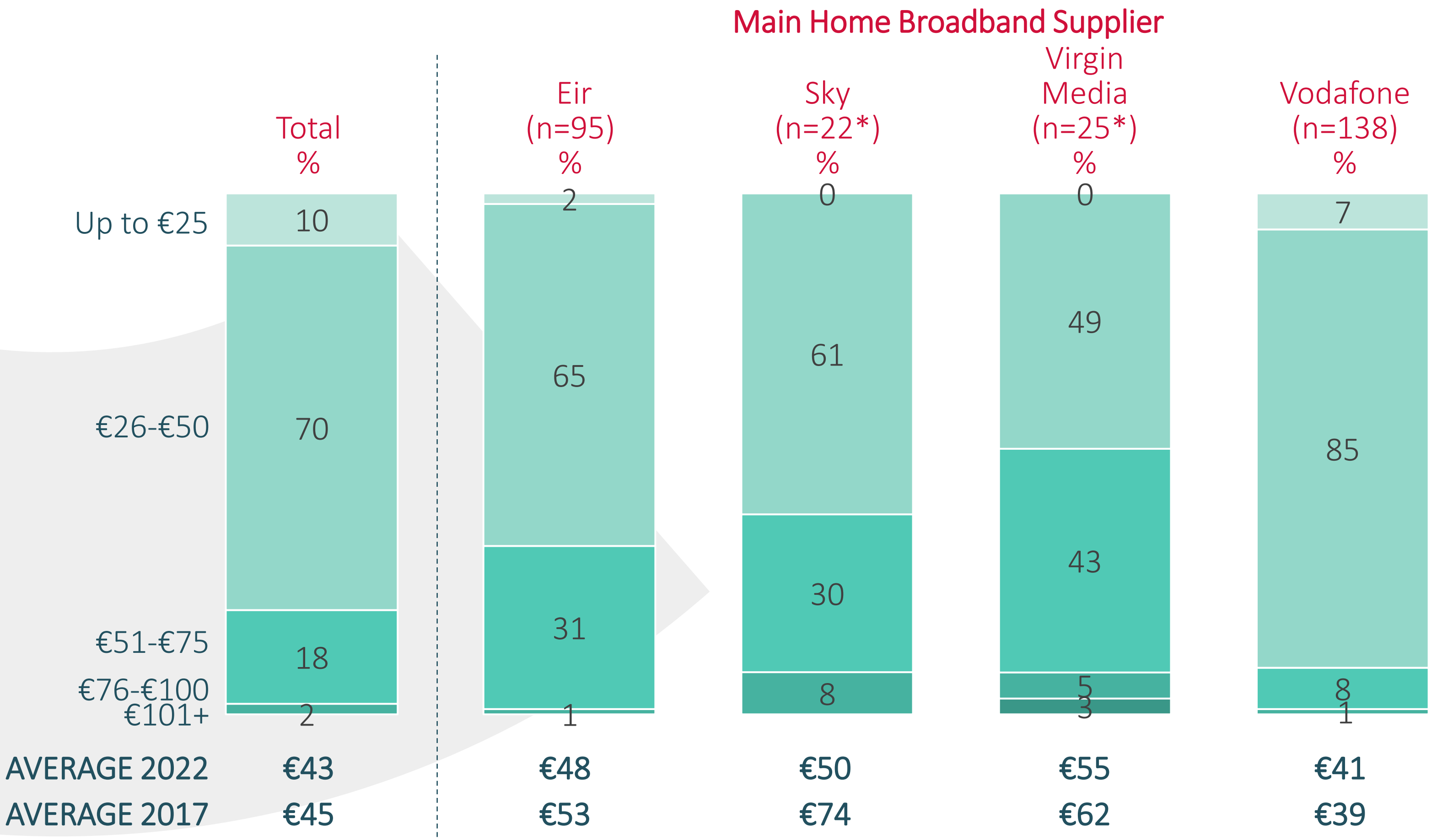
Q.23 How much do you and your household typically pay for broadband per month (excluding any promotional/introductory offers)?

(Base : All Definitely/Maybe Know Monthly Cost Of Broadband Service Non Bundle, n=479)

*Caution: Small Base Size

Typical Broadband Spend Per Month (Non Bundle)

Average claimed monthly spend for standalone broadband is lowest for Vodafone customers (€41).



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

(Base : All Definitely/Maybe Know Monthly Cost Of Broadband Service Non Bundle, n=479)

*Caution: Small Base Size

6.

SSNIP (for broadband in a bundle)

Action Taken If Price of Broadband Increased by €4 in Bundle

65% of bundle consumers would keep their bundle if the price increased by €4

57% would keep and do nothing with those in Region 1 the most likely to do nothing.

	TOTAL (N=1132) %	REGION 1 (n=157) %	REGION 2 (n=194) %	REGION 3 (n=168) %	REGION 4 (n=212) %	REGION 5 (n=401) %	Dublin (n=283) %	Rest of Leinster (n=293) %	Munster (n=276) %	Conn/ Ulster (n=280) %
NET: Keep	65	85	76	74	70	60	61	56	69	82
Keep (Do Nothing)	57	70	72	60	61	53	56	54	57	65
Stay with provider and downgrade	8	15	4	14	8	7	5	1	12	17
NET: Cancel	6	1	9	1	9	6	8	5	5	4
Cancel Completely	2	0	1	**	3	3	3	1	3	2
Cancel But Switch Broadband Only	2	1	4	**	3	1	2	2	**	1
Cancel But Switch All	2	0	4	1	3	2	2	2	2	1
Shop around	11	2	7	17	11	11	1	36	5	3
Don't Know	18	12	8	7	10	23	30	3	21	11

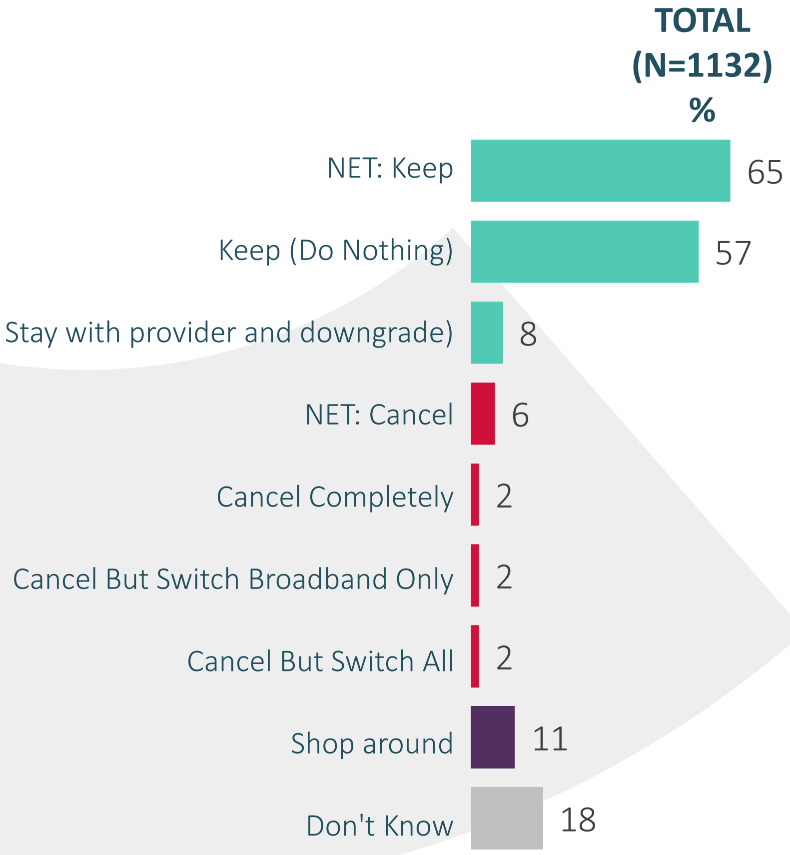
Q25. You mentioned earlier that your primary broadband service is provided over...If all broadband suppliers of...increase the broadband cost of your bundle by €4 per month what action would you take?

(Base : All Bundle Owners Aware Of Broadband Access Type, n=1132)

**= less than 0.5%

Action Taken If Price Broadband Increased by €4 in Bundle

Those with cable access are most likely to be unsure what to do if bundle cost increased by €4



	Traditional Phone (n=378) %	Cable Network (n=183) %	Fibre Network (n=463) %	Mobile broadband (n=22*) %	Other broadband (n=86) %
NET: Keep	73	60	61	52	80
Keep (Do Nothing)	62	55	54	27	69
Stay with provider and downgrade)	10	5	7	25	12
NET: Cancel	8	6	4	21	8
Cancel Completely	4	2	**	17	5
Cancel But Switch Broadband Only	1	2	2	4	1
Cancel But Switch All	2	1	2	0	2
Shop around	6	3	20	4	6
Don't Know	13	31	15	23	6

Q25. You mentioned earlier that your primary broadband service is provided over…If all broadband suppliers of…increase the broadband cost of your bundle by €4 per month what action would you take?

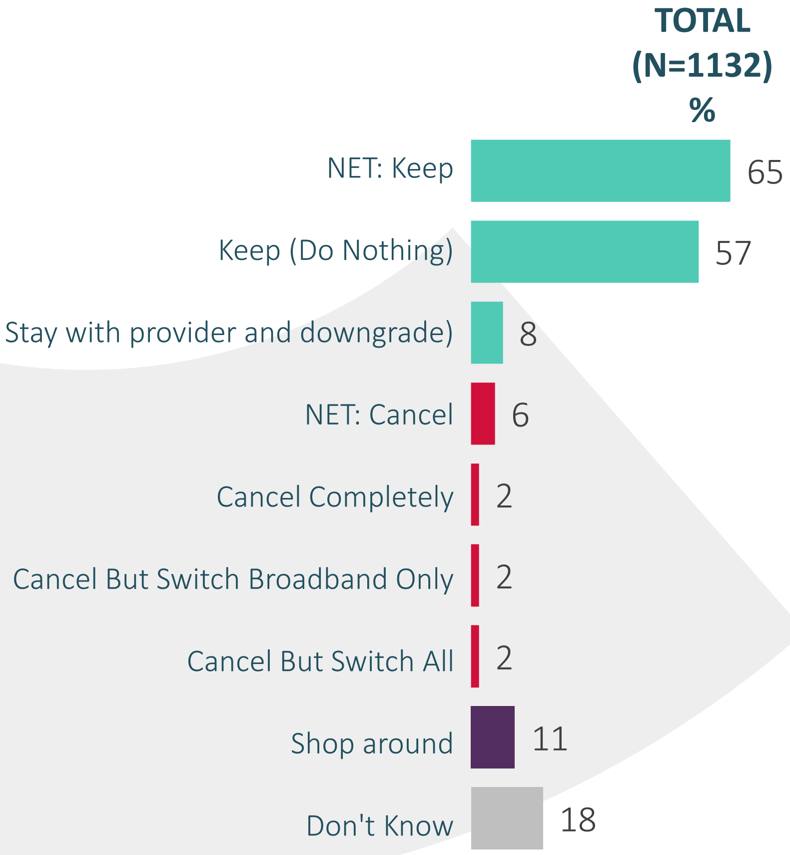
(Base : All Bundle Owners Aware Of Broadband Access Type, n=1132)

**= less than 0.5%

*Caution: small base size

Action Taken If Price Broadband Increase By €4 in Bundle

60% of Sky customers say they would do nothing if the bundle cost increased by €4



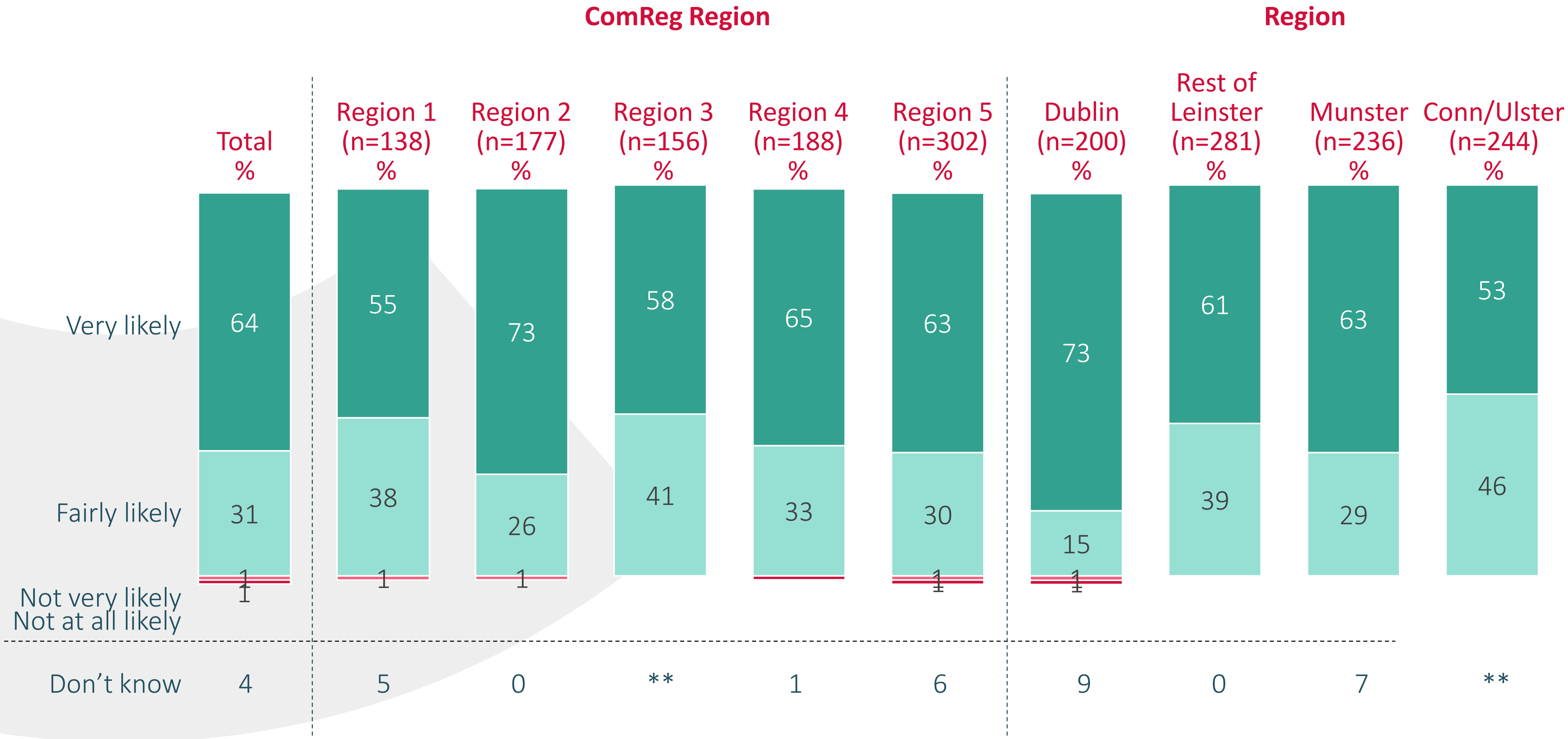
	Eir (n=355) %	Sky (n=261) %	Virgin Media (n=209) %	Vodafone (n=217) %
NET: Keep	63	69	58	66
Keep (Do Nothing)	56	60	53	59
Stay with provider and downgrade)	7	9	5	7
NET: Cancel	6	3	9	5
Cancel Completely	3	1	3	2
Cancel But Switch Broadband Only	2	1	2	1
Cancel But Switch All	1	1	3	2
Shop around	15	12	3	21
Don't Know	15	17	30	6

Q25. You mentioned earlier that your primary broadband service is provided over…If all broadband suppliers of…increase the broadband cost of your bundle by €4 per month what action would you take?

(Base : All Bundle Owners Aware Of Broadband Access Type, n=1132)

Likelihood of going through with decision (Bundle)

64% state they are very likely to go through with the decision they made in relation to the €4 bundle increase. This includes all responses to this question from do nothing to cancelling.



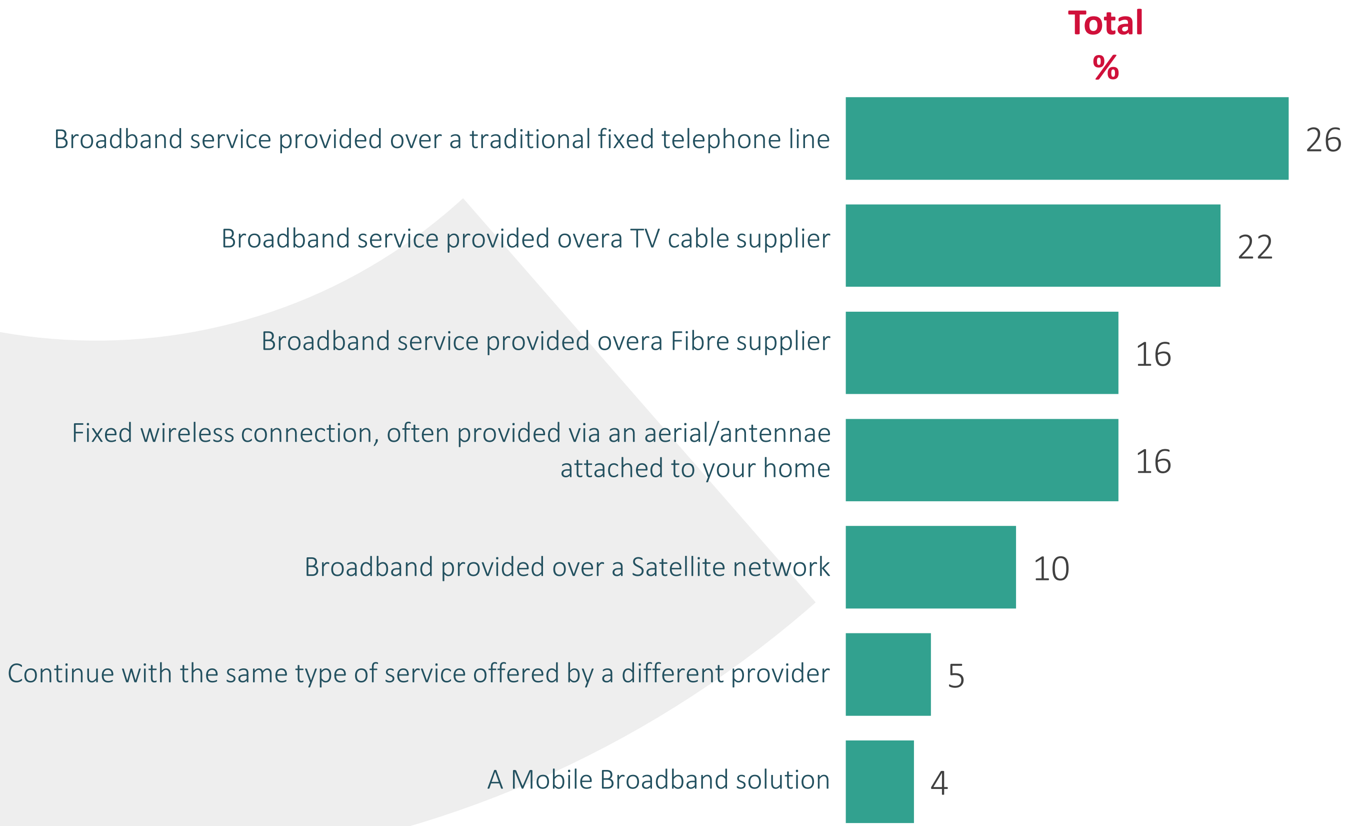
Q.26 How likely are you and your household to…

(Base : All Bundle Owners Aware Of Broadband Access Type And Likely To Act n=961)

**= less than 0.5%

Broadband Type Likely Switch To – based on Switch/Cancel responses

Those likely to switch out of their bundle due to a price increase are most likely to subscribe to a broadband service supplied over fixed phone line.



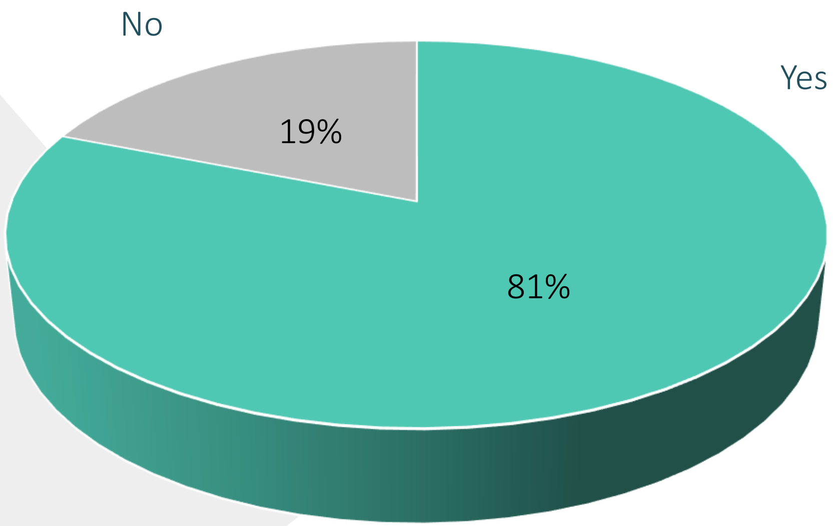
Q.27 Which type of broadband service would you and your household be most likely to switch to?

(Base: All Bundle Owners Likely to Switch Broadband, n=36*)

*Caution: Small Base Size

Awareness of Broadband Type Available In Area (Base = all who are likely to switch in response to price increase)

The majority consider that the broadband type they would switch to is available in their area.



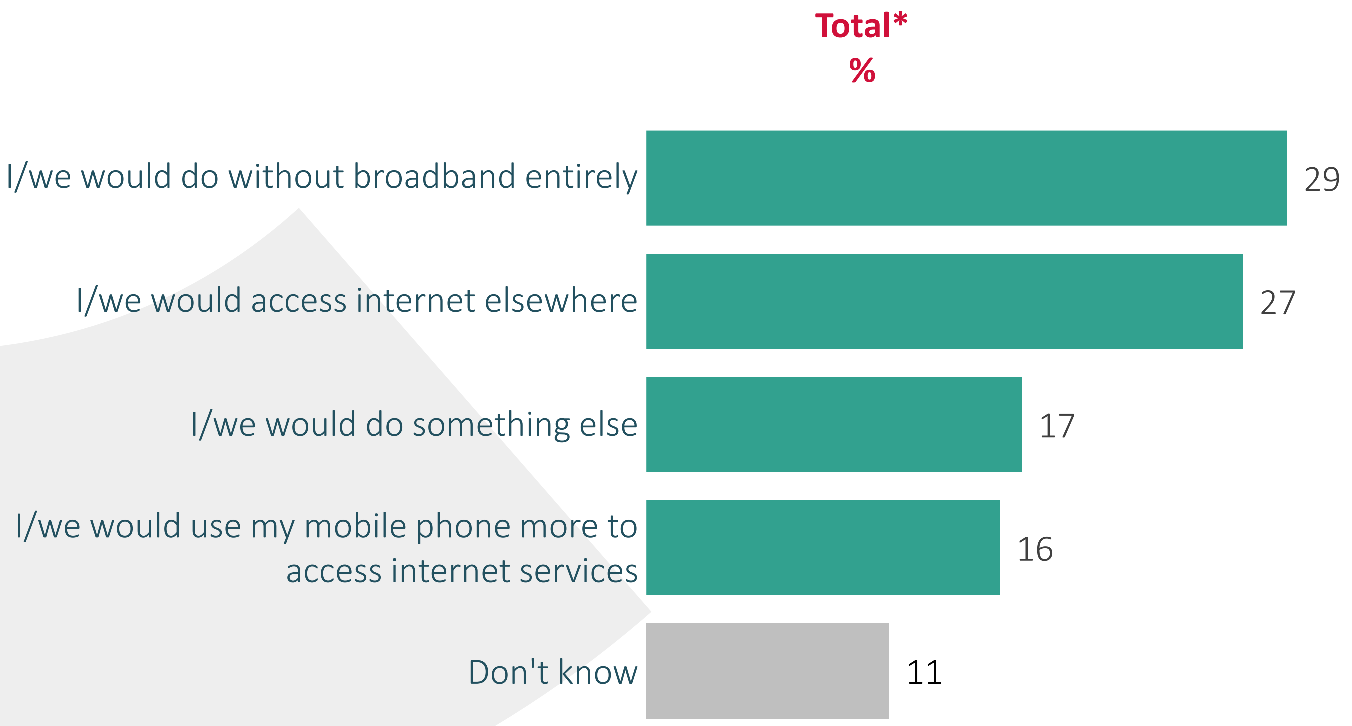
Q.29 You have just said that you would switch to broadband type… do you know if this access type is available in your area?

(Base: All Bundle Owners Likely to Switch Broadband; n=34*)

*Caution: Small Base Size

Action for those that would cancel broadband outright in response to €4 increase (Bundle)

29% of those who would cancel completely state they would do without broadband outright.



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

(Base: All Bundle Owners Likely to Cancel Completely; n=20*)

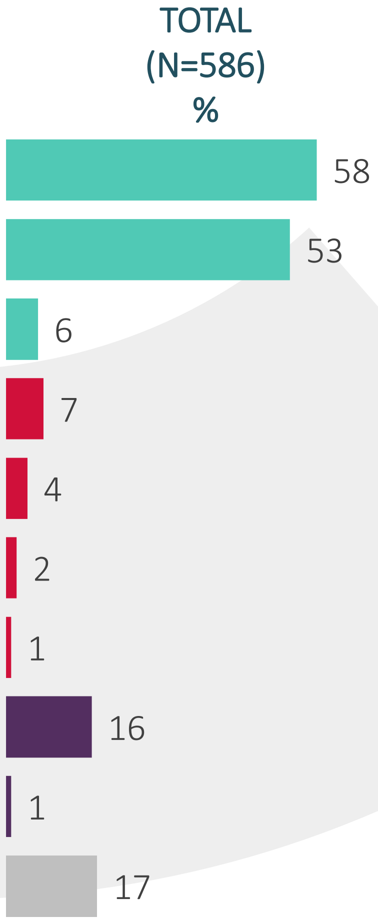
*Caution: Small Base Size

7.

SSNIP (for standalone broadband)

Action Taken If Price Broadband Increase By €4 (Non-Bundle)

53% of standalone customers would keep broadband service with no change if it increased by €4 – highest in Region 1 and Conn/Ulster



	TOTAL (N=586) %	REGION 1 (n=85) %	REGION 2 (n=121) %	REGION 3 (n=125) %	REGION 4 (n=118) %	REGION 5 (n=137) %	Dublin (n=46*) %	Rest of Leinster (n=177) %	Munster (n=193) %	Conn/ Ulster (n=170) %
NET: Keep	58	75	79	55	68	52	33	50	66	74
Keep (do nothing)	53	71	72	51	62	47	31	49	55	68
Stay with provider and downgrade	6	4	8	4	6	6	2	1	11	5
NET: Cancel	7	9	8	12	14	4	10	7	5	12
Cancel but switch BB bundle	4	4	5	9	5	2	4	5	4	3
Cancel – switch all	2	3	3	3	6	1	6	**	1	5
Cancel – completely	1	2	1	1	3	1	0	1	**	3
Shop around	16	6	6	22	11	18	0	38	7	7
I/we would do something else	1	0	0	1	0	2	2	0	1	3
Don't know	17	9	6	10	7	23	56	5	20	5

**= less than 0.5%

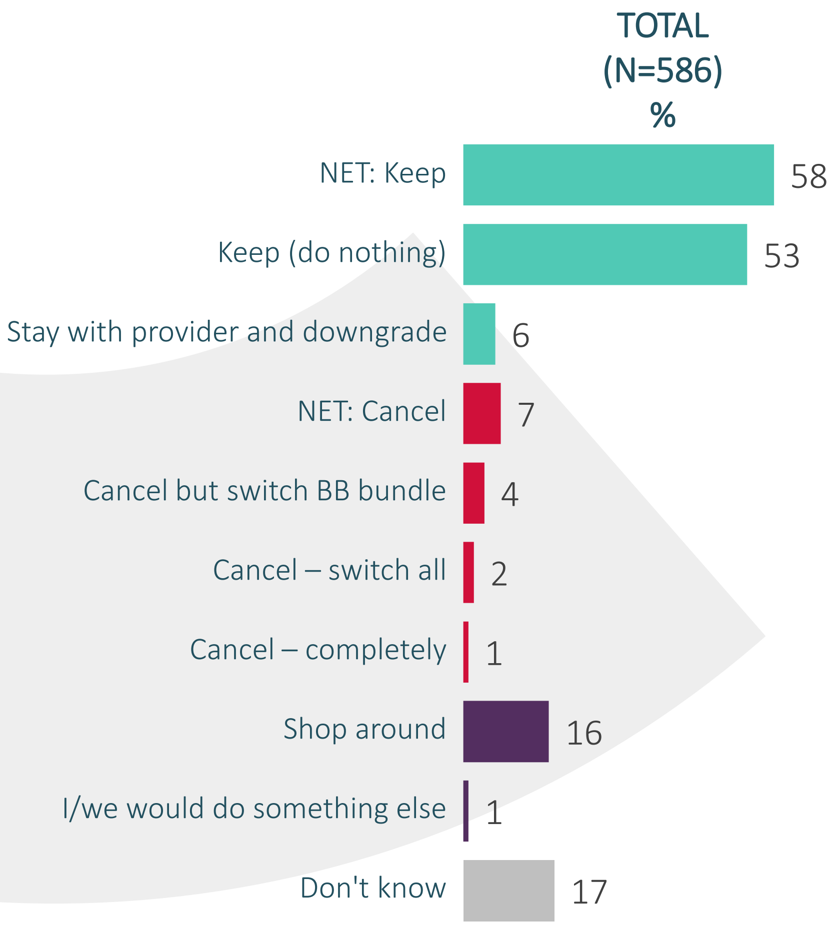
Q.30 Which of the following would best describe what you and your household would be most likely to do in response to this hypothetical €4 price increase of your broadband service?

*Caution: Small Base Size

(Base: All non-bundle owners aware of broadband access type, n=586)

Action Taken If Price Broadband Increase By €4 (Non-Bundle)

Non bundle customers with traditional phone based broadband are most likely to do nothing in response to a €4 price increase in broadband.



	Traditional Phone (n=106) %	Cable Network (n=32*) %	Fibre Network (n=202) %	Mobile Broadband (n=78) %	Other Broadband (n=168) %
NET: Keep	81	52	44	60	64
Keep (do nothing)	71	40	42	54	60
Stay with provider and downgrade	10	12	2	6	4
NET: Cancel	6	0	10	10	6
Cancel but switch BB bundle	1	0	5	9	4
Cancel – switch all	4	0	3	0	1
Cancel – completely	0	0	2	1	1
Shop around	3	15	25	6	21
I/we would do something else	2	0	1	2	**
Don't know	8	33	19	23	9

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 €4 price increase of your broadband service?

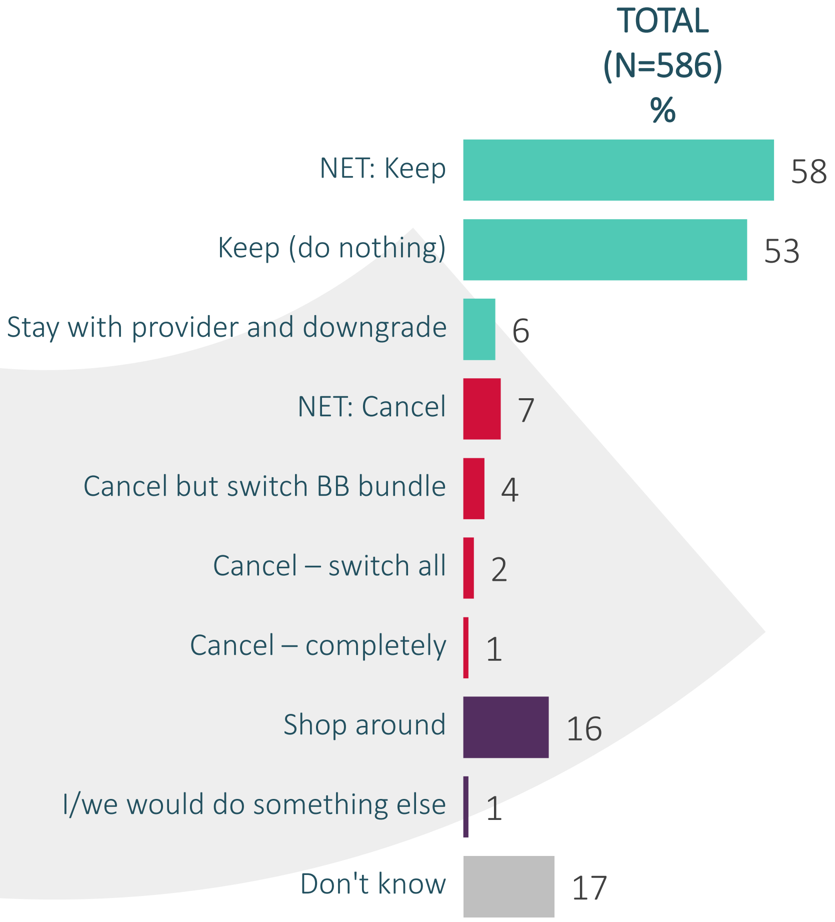
(Base: All non-bundle owners aware of broadband access type, n=586)

**= less than 0.5%

*Caution: Small Base Size

Action Taken If Price Broadband Increase By €4 (Non-Bundle)

Vodafone standalone customers are the most likely to do nothing



	Eir (n=107) %	Sky (n=33*) %	Virgin Media (n=40*) %	Vodafone (n=173) %
NET: Keep	60	37	46	63
Keep (do nothing)	51	37	37	58
Stay with provider and downgrade	10	0	9	5
NET: Cancel	8	14	5	7
Cancel but switch BB bundle	2	4	2	5
Cancel – switch all	5	10	0	1
Cancel – completely	1	0	3	1
Shop around	24	2	16	17
I/we would do something else	0	0	4	1
Don't know	8	46	30	12

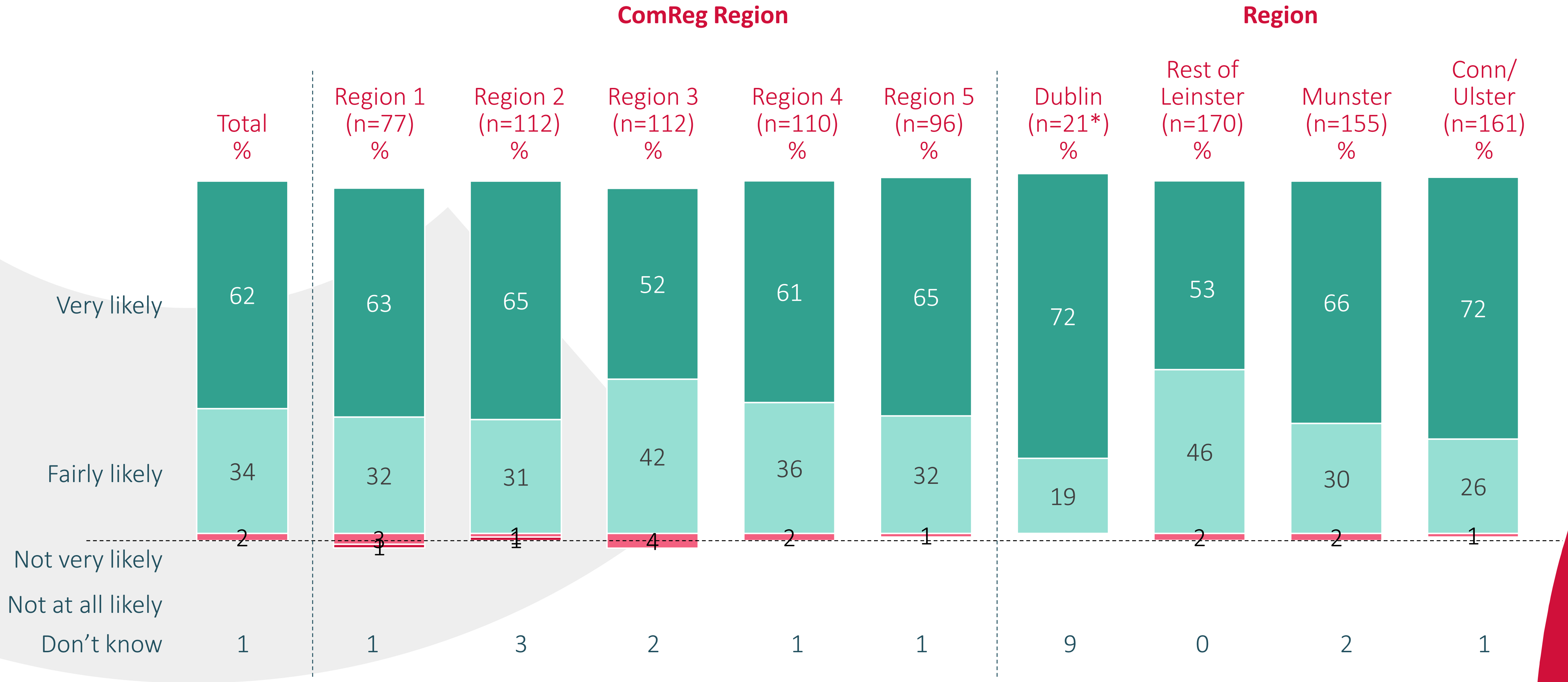
Q.30 Which of the following would best describe what you and your household would be most likely to do in response to this hypothetical €4 price increase of your broadband service?

(Base: All non-bundle owners aware of broadband access type, n=586)

*Caution: Small Base Size

Likelihood of going through with decision (Non Bundle)

62% state they are very likely to go through with decision they made in relation to €4 broadband price increase – covering all action types – do nothing, switching and cancelling.



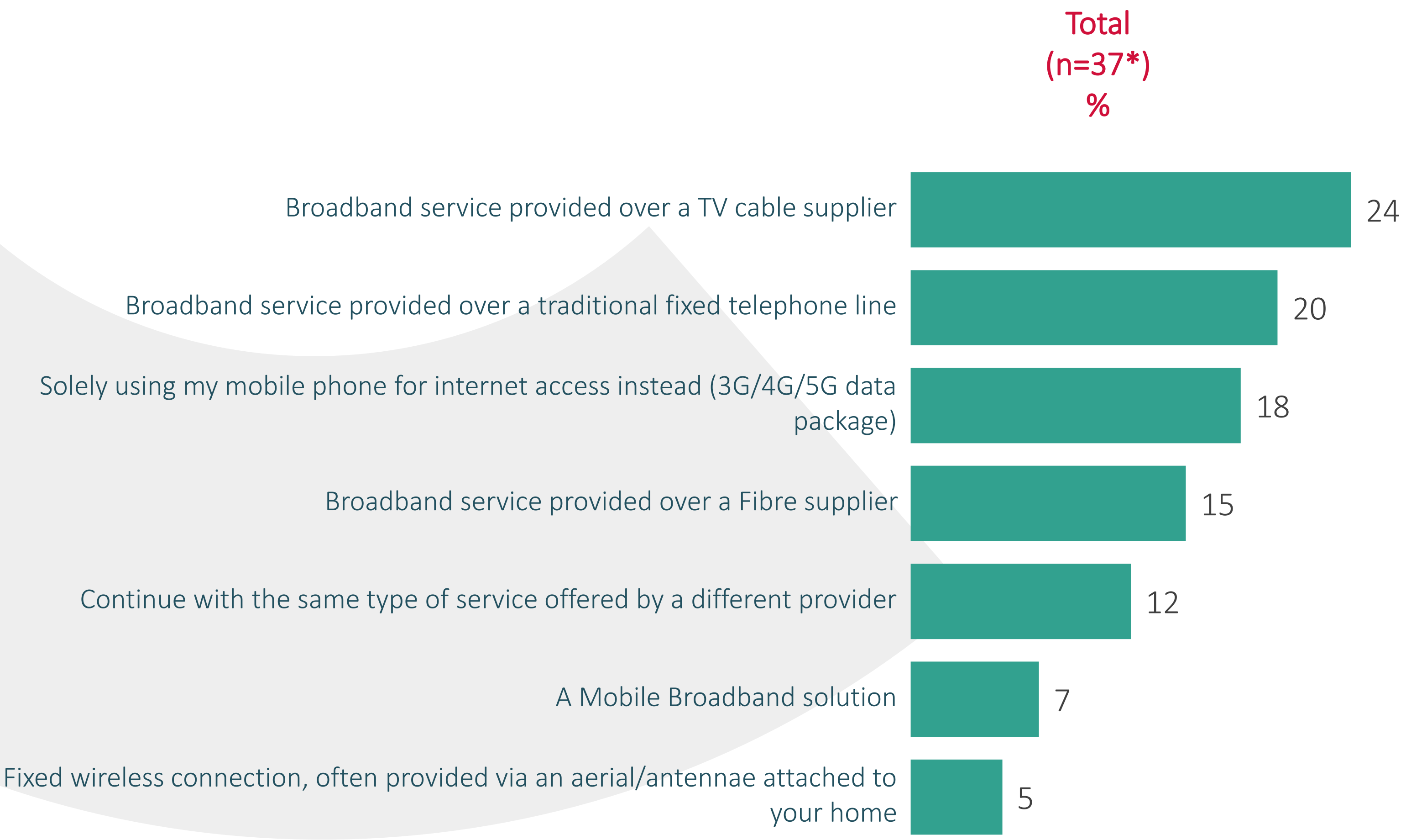
Q.31 How likely are you (and your household) to go through with that decision?

(Base: All Non-bundle Owners Aware Of Broadband Access Type (And Likely To Act) n=507)

*Caution: Small Base Size

Broadband type likely to switch to

Those likely to switch their broadband service as a result of a €4 increase are most likely to switch to broadband provided by a cable-based supplier.



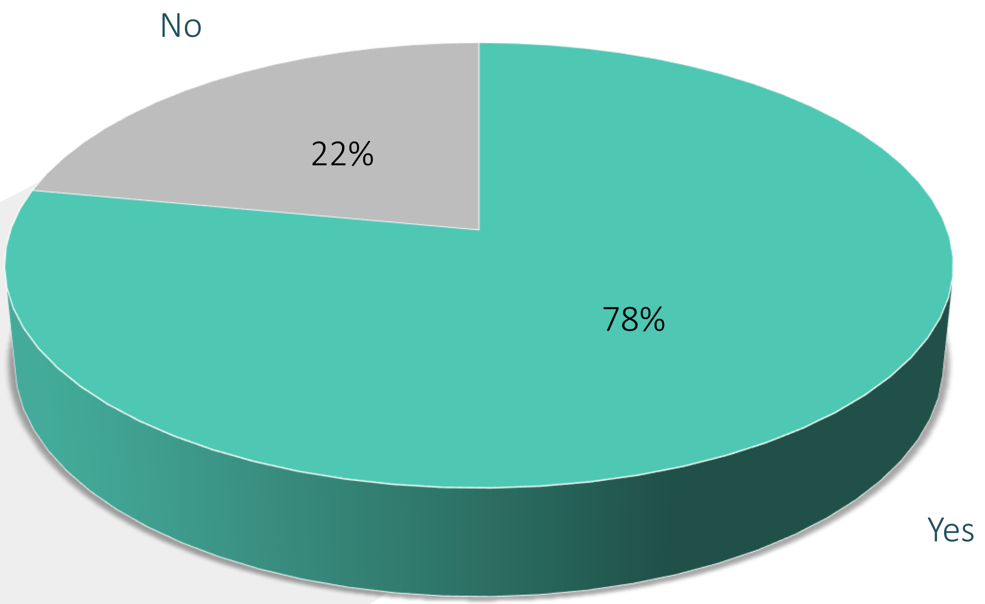
Q.32 Which type of broadband service would you and your household be most likely to switch to?

(Base: All Non Bundle Owners Likely to Cancel/Switch Broadband, n=37*)

*Caution: Small Base Size

Awareness If Broadband Type Is Available In Area (base of those likely to switch)

78% know the broadband type they would switch to is available in their area.



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

(Base: All Non Bundle Owners Likely to Switch Broadband; n=33*)

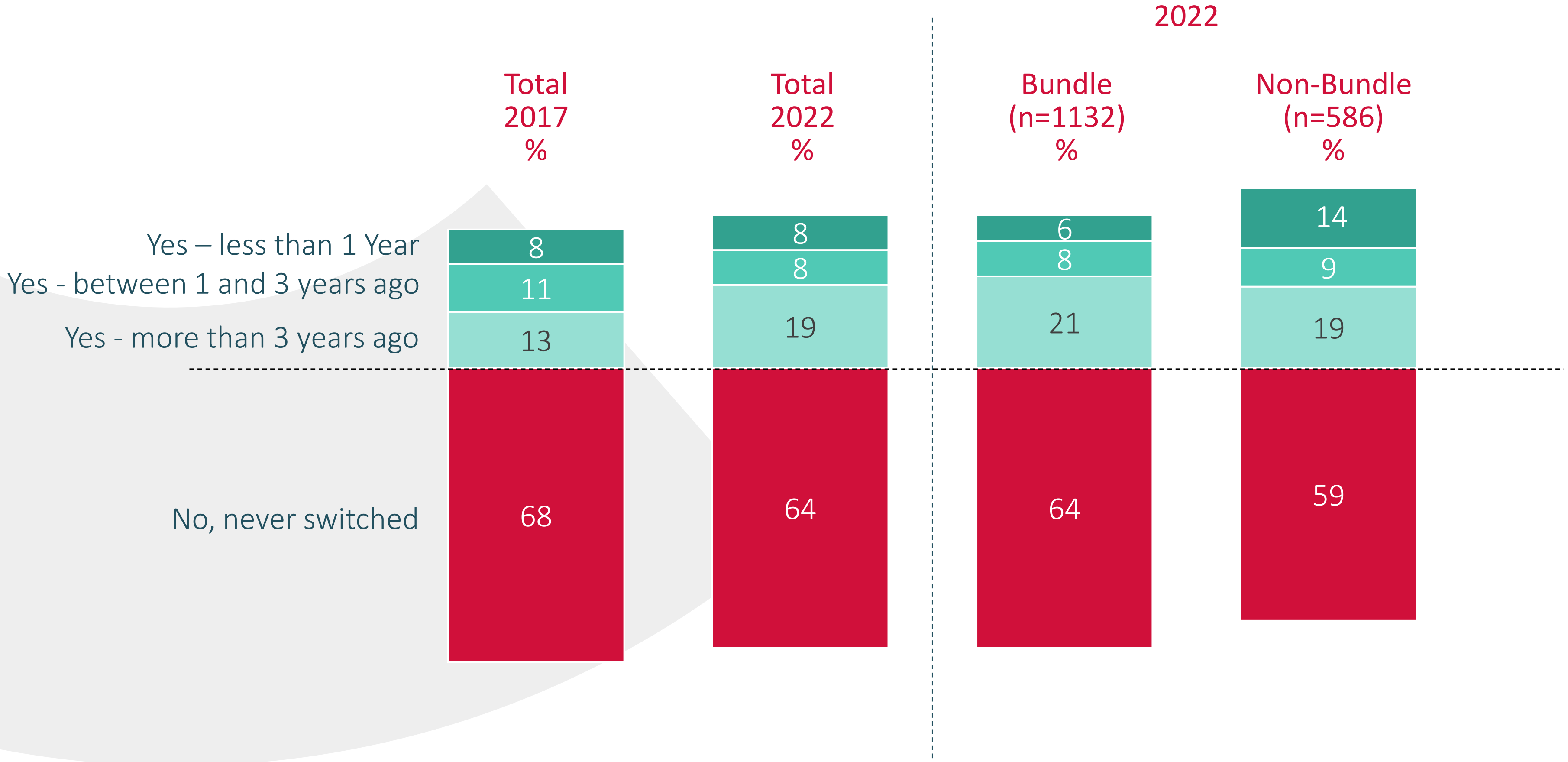
*Caution: Small Base Size

8.

Contract periods and switching behaviour

Incidence of Switching Broadband

The majority of those with broadband access have never switched. Just 16% have switched within the past 3 years.

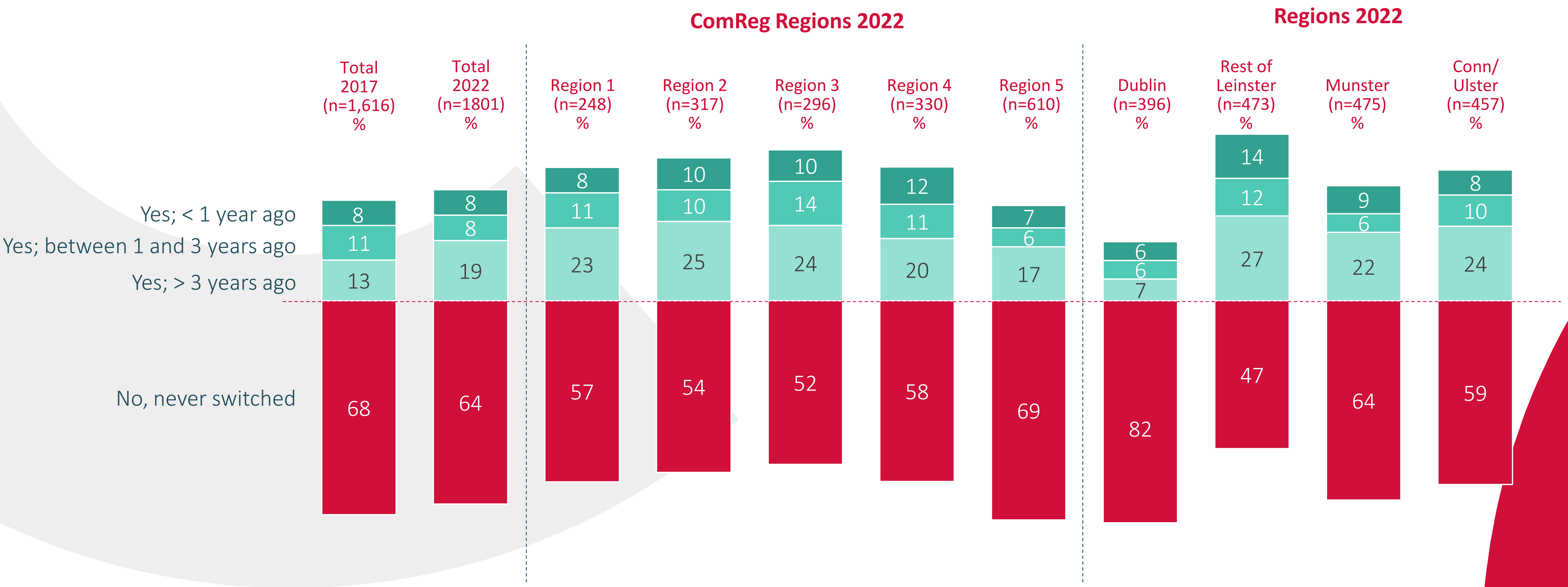


Q.35 Have you and your household ever switched broadband supplier in your home?

(Base: All With Broadband Access, n=1801)

Incidence of Switching Broadband

Region 5 has the lowest incidence of switching, whilst those in Region 3 are most likely to switch.

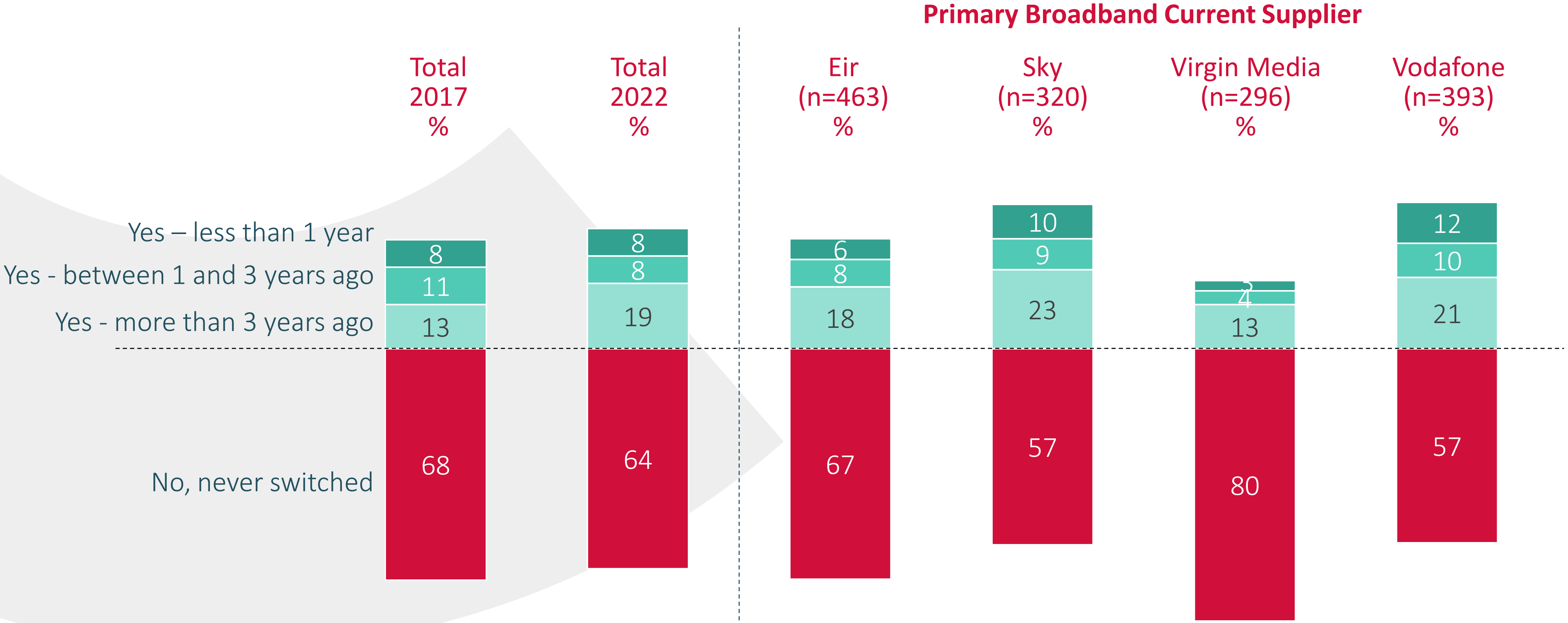


Q.35 Have you and your household ever switched broadband supplier in your home?

(Base: All With Broadband Access, n=1801)

Incidence of Switching Broadband

Current Virgin Media customers are the least likely to have ever switched. Sky and Vodafone customers are the most likely to have switched in the past.

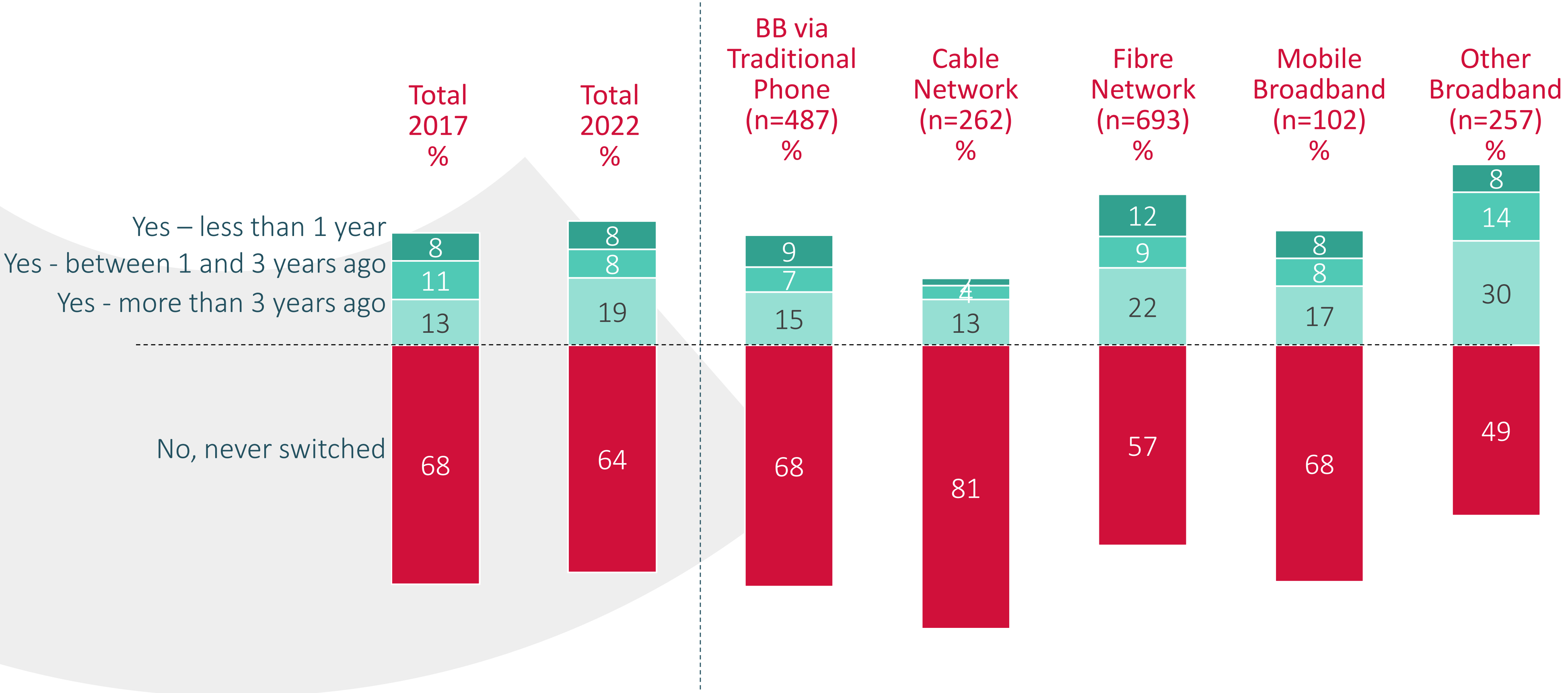


Q.35 Have you and your household ever switched broadband supplier in your home?

(Base: All With Broadband Access, n=1801)

Incidence of Switching Broadband

81% of those that get broadband via cable have never switched, with those on fibre and 'other' forms of broadband the most likely to switch.



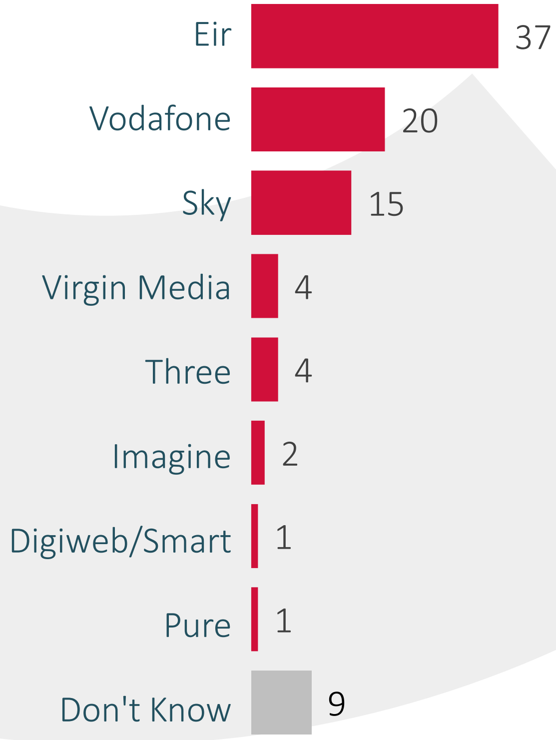
Q.35 Have you and your household ever switched broadband supplier in your home?

(Base: All With Broadband Access, n=1801)

Previous Broadband Supplier – Switched From

Eir, at 37%, is the most frequently mentioned supplier that respondents have switched from, followed by Vodafone and Sky.

Previous Provider of Broadband
Total
%



Primary Current Broadband Supplier

Previous Provider	2017 Total %	Eir (n=157) %	Sky (n=151) %	Virgin Media (n=54) %	Vodafone (n=167) %
Eir	43	0	49	42	48
Vodafone	17	47	18	11	0
Sky	9	25	0	28	15
Virgin Media	9	2	12	0	2
Three	11	5	0	0	7
Imagine	2	2	2	0	4
Digiweb/Smart	0	3	1	0	2
Pure	1	1	0	3	3
Don't Know	7	5	9	12	13

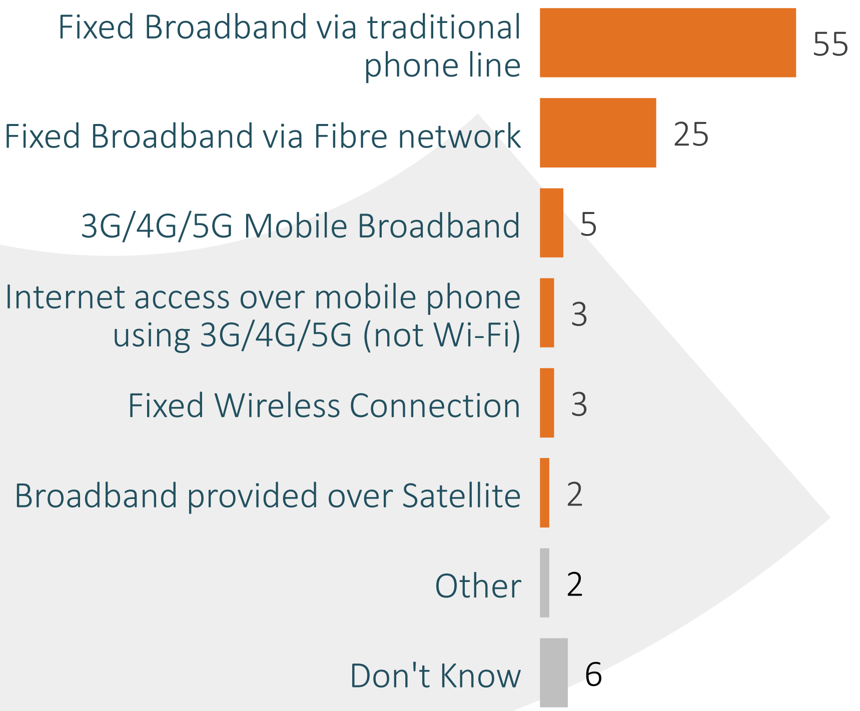
Q.36 What operator previously provided you and your household with your last broadband service?

(Base: All Previously Switched Broadband Supplier, n=701)

Previous Broadband Type Used

84% of those accessing broadband via traditional phone also accessed broadband by the same means with their previous broadband supplier.

Previous Broadband Used
%



Current Broadband Access Type

Traditional Phone (n=152) %	Cable Network (n=42*) %	Fixed Fibre (n=247) %	Mobile Broadband (26*) %	Other Broadband (101) %
84	34	47	46	64
5	31	39	3	4
4	1	2	39	9
0	4	1	7	13
0	0	4	0	4
1	6	1	0	0
1	4	2	0	1
4	21	4	5	4

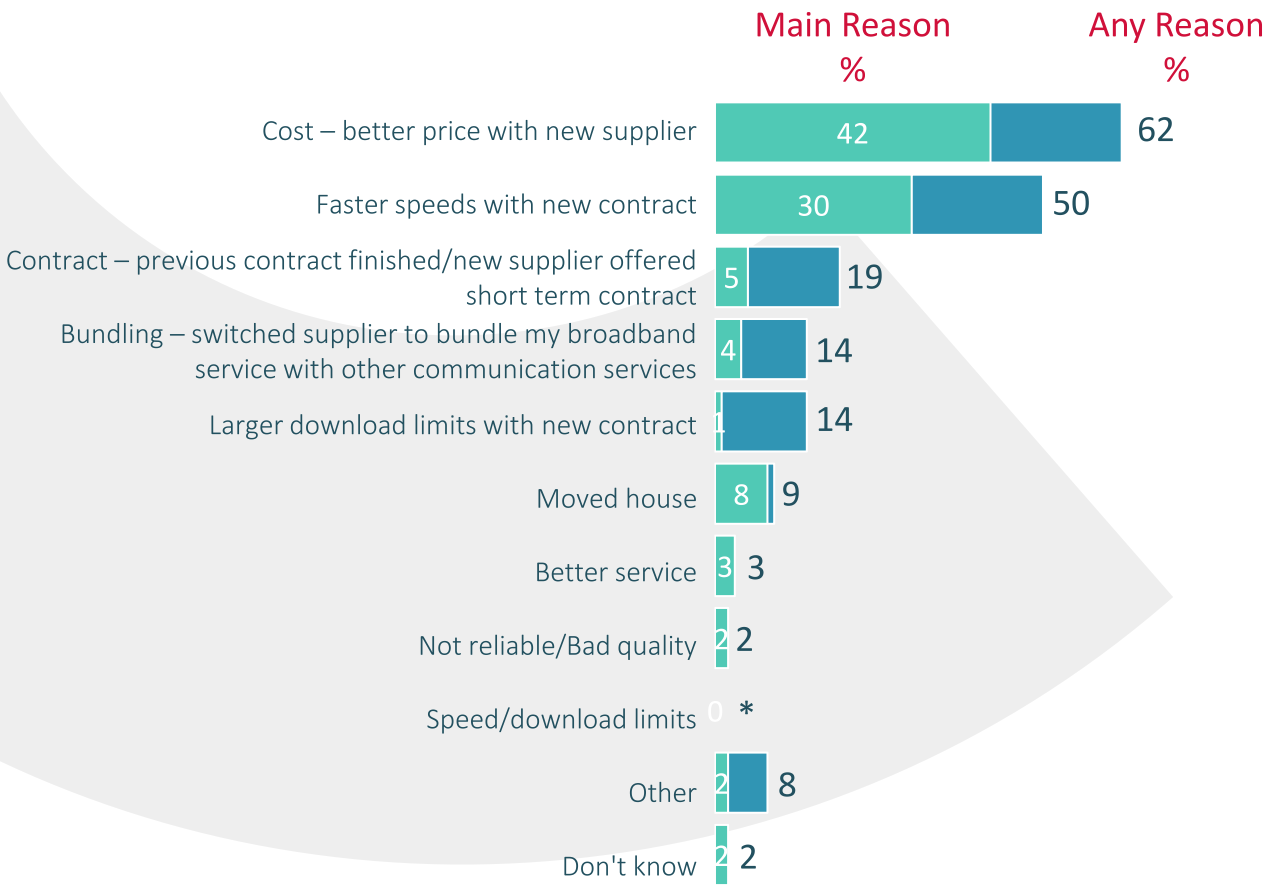
Q37. Thinking about your previous broadband supplier which of the following access modes did you previously use?

(Base: All Previously Switched Broadband Supplier, n=568)

*Caution: Small Base Size

Reason For Switching Broadband

Cost is cited as the main reason for switching by the majority of respondents (62%), most notably in Region 2. This is followed by faster speeds with new contract (50%) which is cited most frequently in Region 1.



ComReg Region					Region			
REGION 1 (n=108) %	REGION 2 (n=148) %	REGION 3 (n=142) %	REGION 4 (n=142) %	REGION 5 (n=161) %	Dublin (n=72) %	Rest of Leinster (n=237) %	Munster (n=202) %	Conn/ Ulster (n=190) %
58	70	48	53	66	68	54	64	69
70	59	60	46	44	45	42	54	63
31	23	25	16	17	16	6	27	36
27	21	17	11	11	15	10	12	23
30	26	18	15	8	7	5	23	23
13	7	8	14	9	15	5	6	17
1	3	2	6	2	2	5	1	1
3	2	3	3	1	2	4	**	1
0	0	1	2	0	0	1	0	0
4	6	9	6	10	3	12	11	3
0	0	**	1	3	4	0	4	0

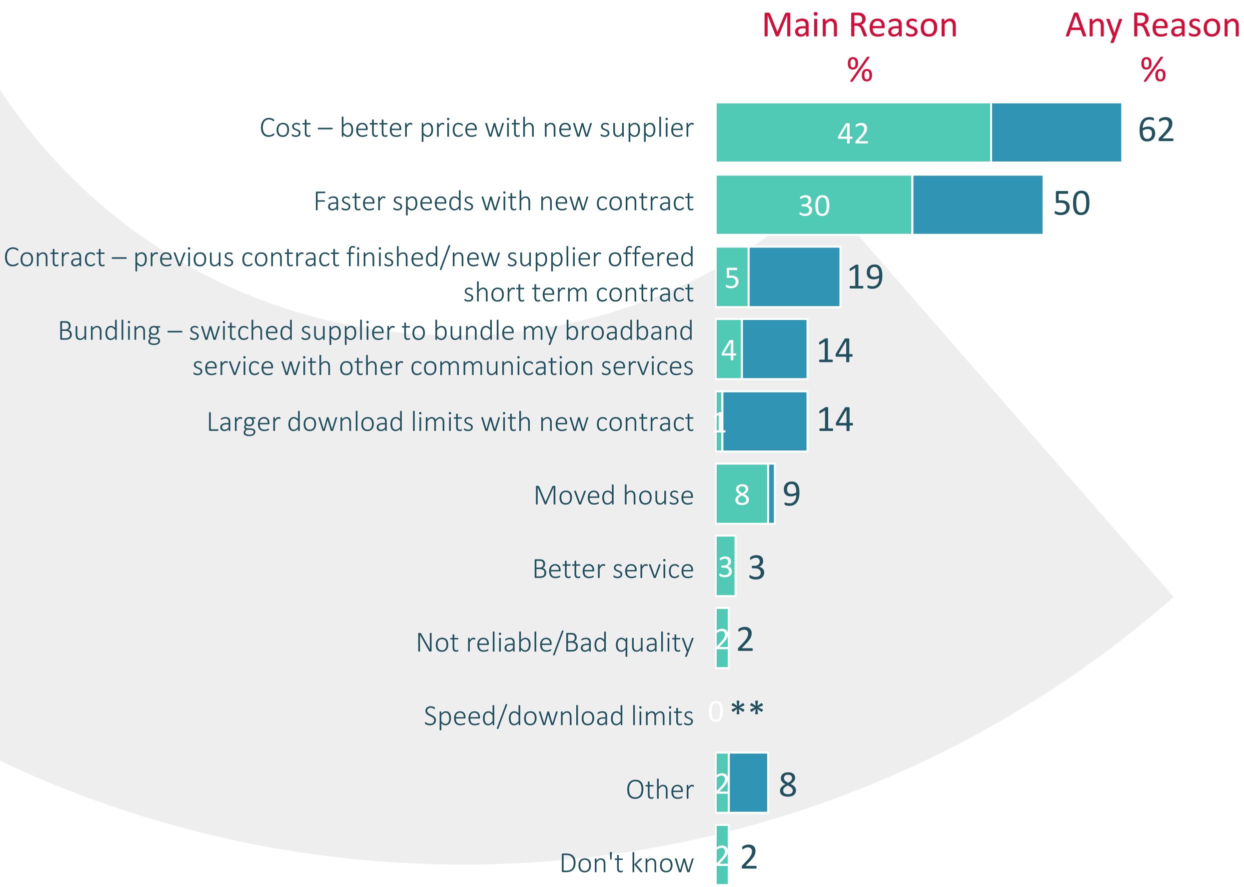
Q38. What was your and your household's main reason for switching broadband supplier? For what other reasons did you switch?

(Base: All Previously Switched Broadband Supplier, n=701)

*Caution: Small Base Size
**= less than 0.5%

Reason For Switching Broadband

A higher proportion of Virgin Media and Eir customers cite cost as their reason for switching, however they are closely followed by Sky and Vodafone customers.



Primary Current Broadband Supplier

Eir (n=157) %	Sky (n=151) %	Virgin Media (n=54) %	Vodafone (n=167) %
64	59	65	58
44	50	54	50
11	28	24	16
8	25	22	10
7	10	17	17
7	14	14	6
3	6	1	2
2	2	0	3
1	2	0	0
13	5	0	11
0	0	9	2

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

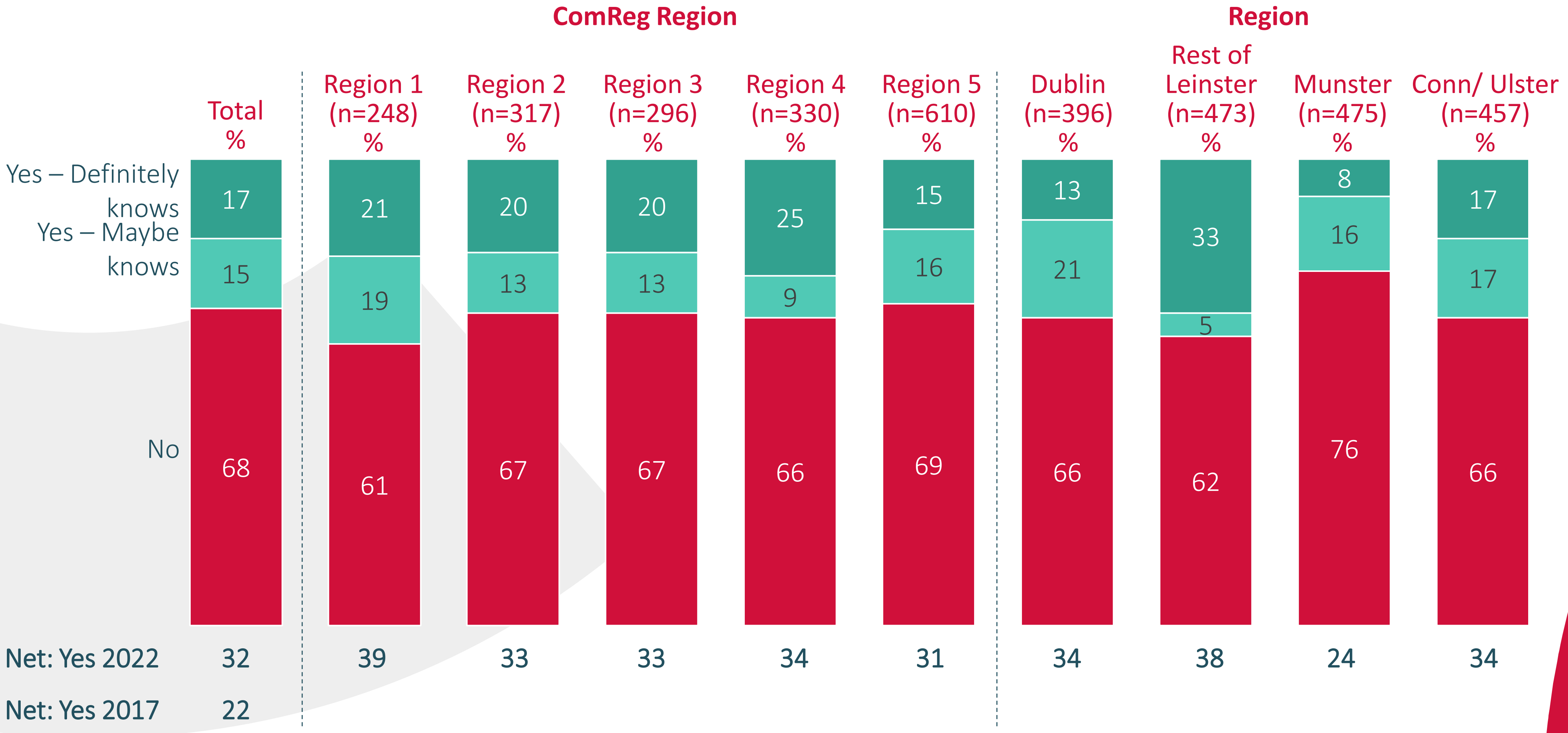
(Base: All Previously Switched Broadband Supplier, n=701)

9.

Knowledge of broadband speeds

Knowledge of Maximum Claimed Download Speed

Knowledge of download speed is up considerably on 2017 figure, by ten percentage points. At 39%, Region 1 respondents are most likely to be aware.

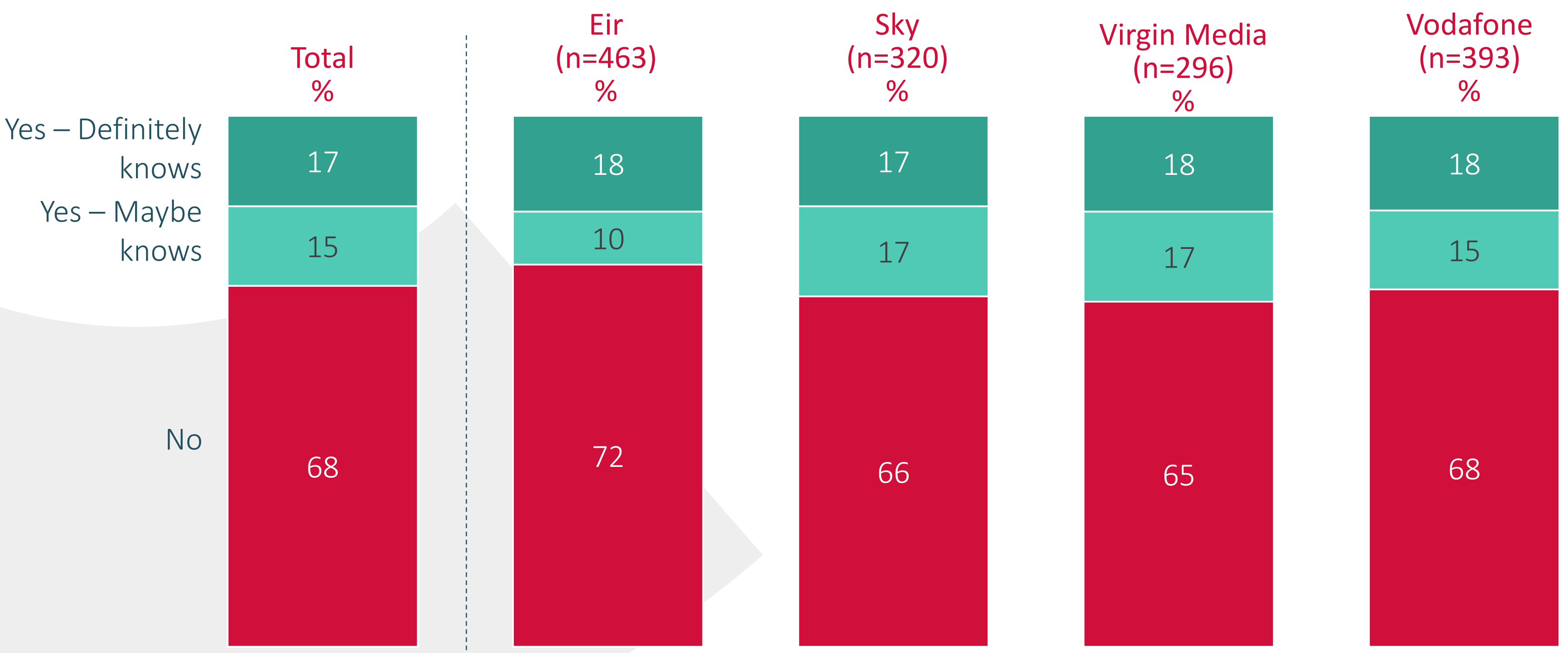


Q.39 Do you know the maximum claimed download speed for your main broadband service?

(Base: All with Broadband Access, n=1801)

Knowledge of Maximum Claimed Download Speed

Virgin Media customers are most knowledgeable about their download speed but across all suppliers awareness in general is low.



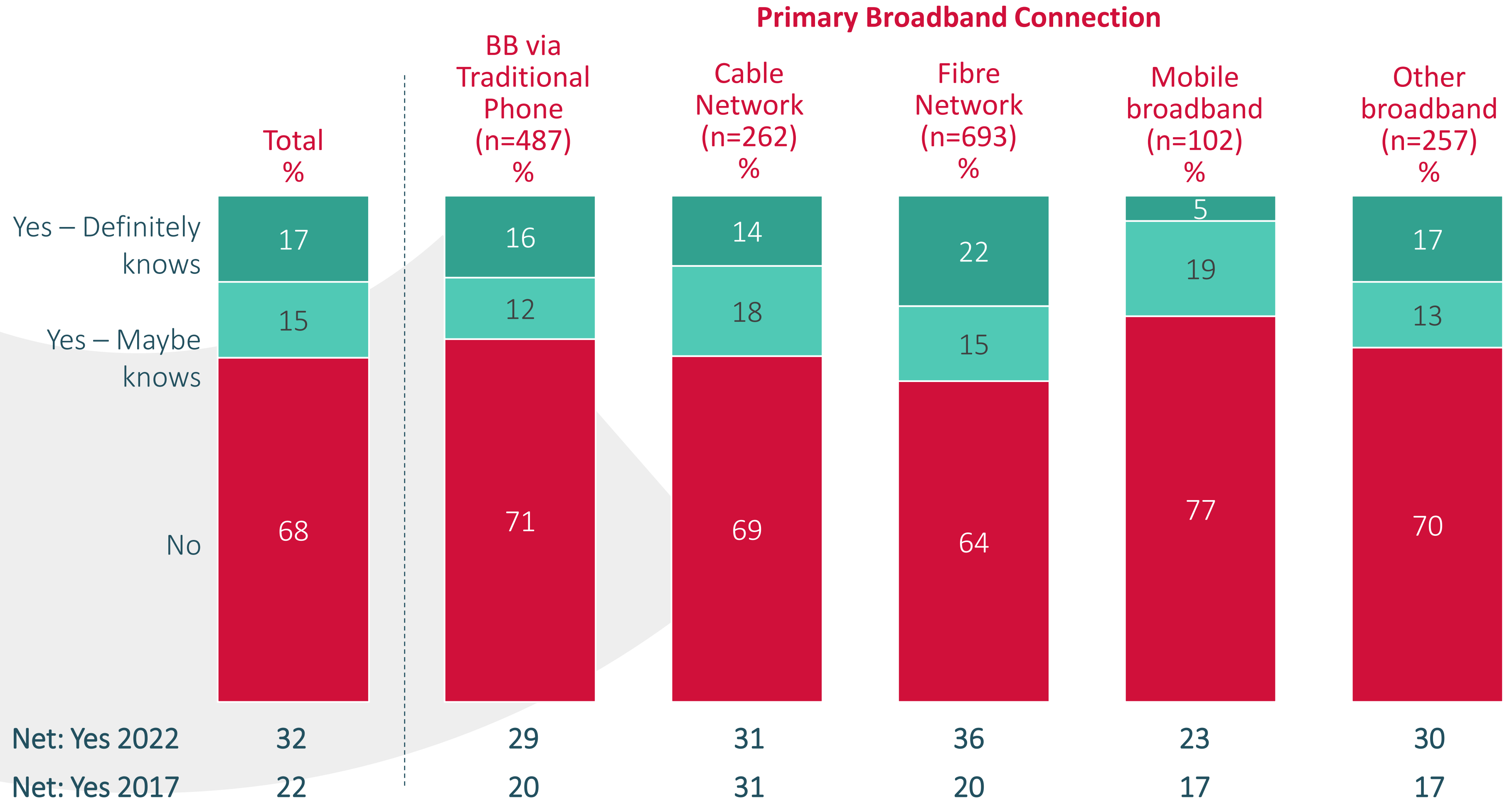
	Total	Eir	Sky	Virgin Media	Vodafone
Net: Yes 2022	32	28	34	35	32
Net: Yes 2017	22	18	20	32	19

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

(Base: All with Broadband Access, n=1801)

Knowledge of Maximum Claimed Download Speed

Those accessing broadband over a fibre network are considerably more likely to be aware of maximum download speeds, with those accessing via mobile broadband the least likely.

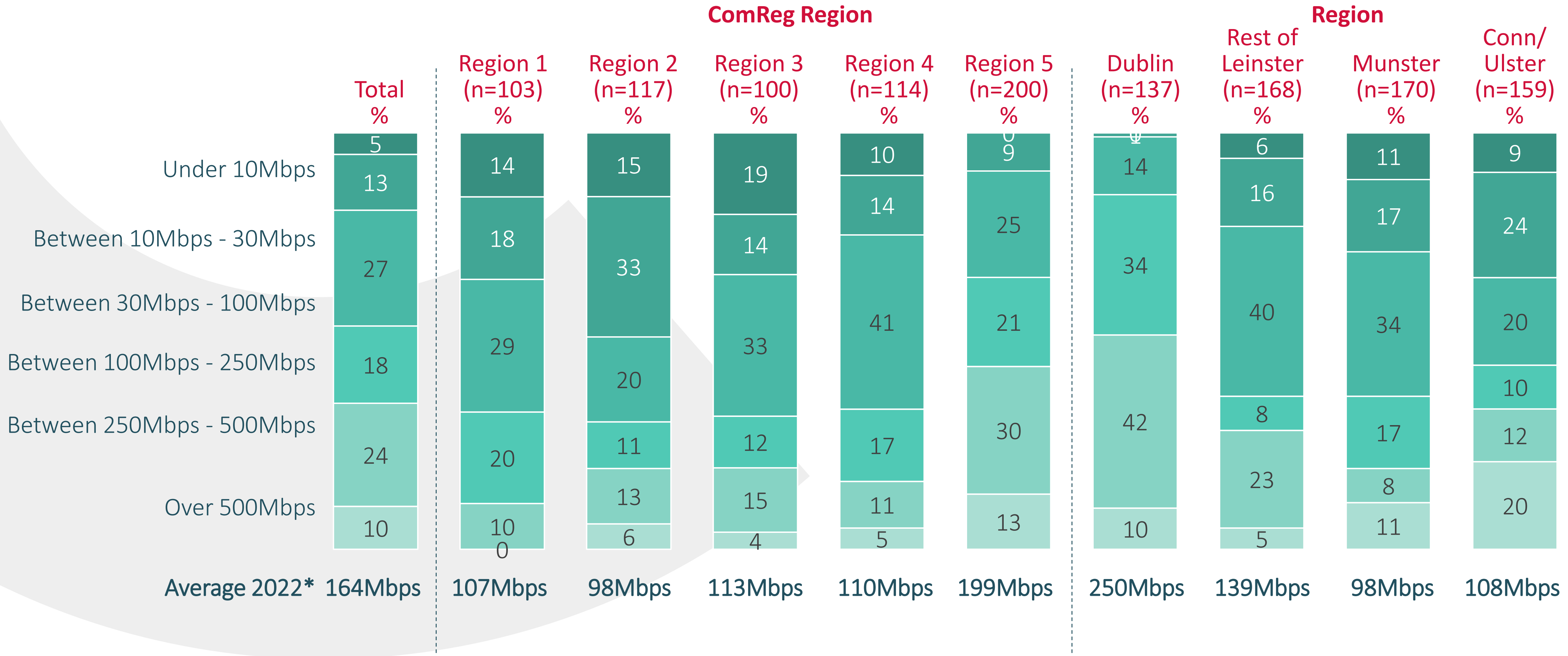


Q.39 Do you know the maximum claimed download speed for your main broadband service?

(Base: All with Broadband Access, n=1801)

Maximum Claimed Download Speed of Broadband

Region 5 has above average speeds at 199Mbps, with Region 2 reporting the lowest at 98 Mbps.



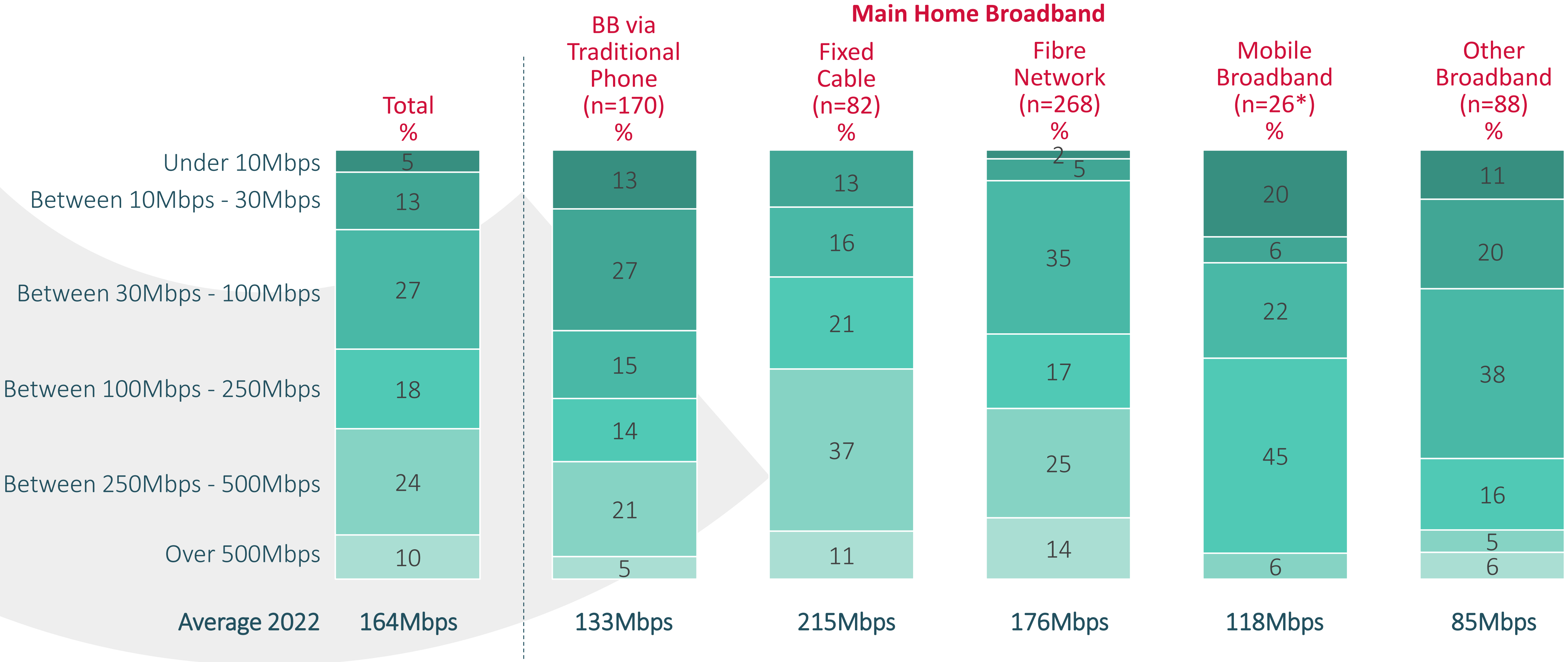
Q.40 What is the maximum claimed ‘up to’ download speed for your main broadband service?

(Base: All Definitely/Maybe Know Download Speed, n=634)

*Average calculated based on the mid point within each band.

Maximum Claimed Download Speed of Broadband

Those accessing broadband via cable report the highest claimed 'up to' download speeds, with mobile broadband customers reporting the lowest.

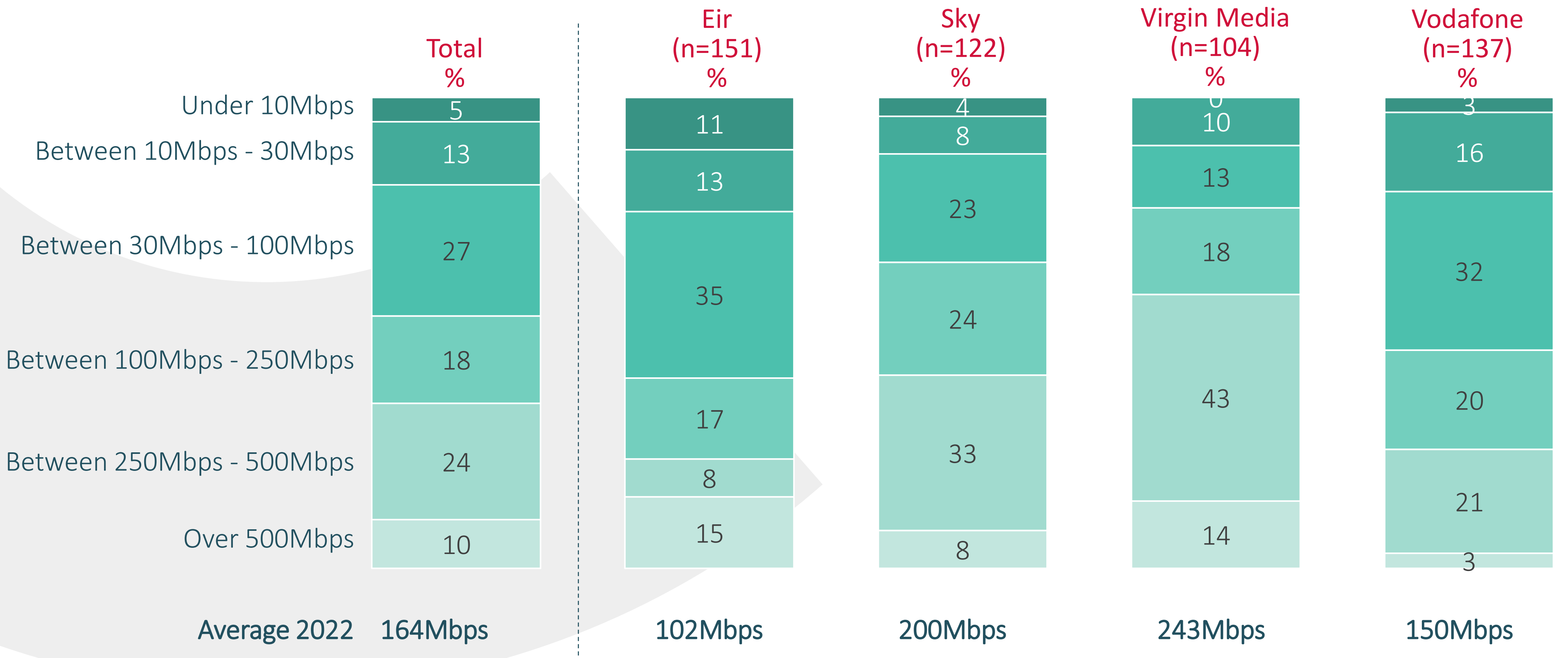


Q.40 What is the maximum claimed 'up to' download speed for your main broadband service?

(Base: All Definitely/Maybe Know Download Speed, n=634)

Maximum Claimed Download Speed of Broadband

Virgin Media broadband customers report the highest claimed average speed at 243Mbps, followed by Sky, at 200Mbps.

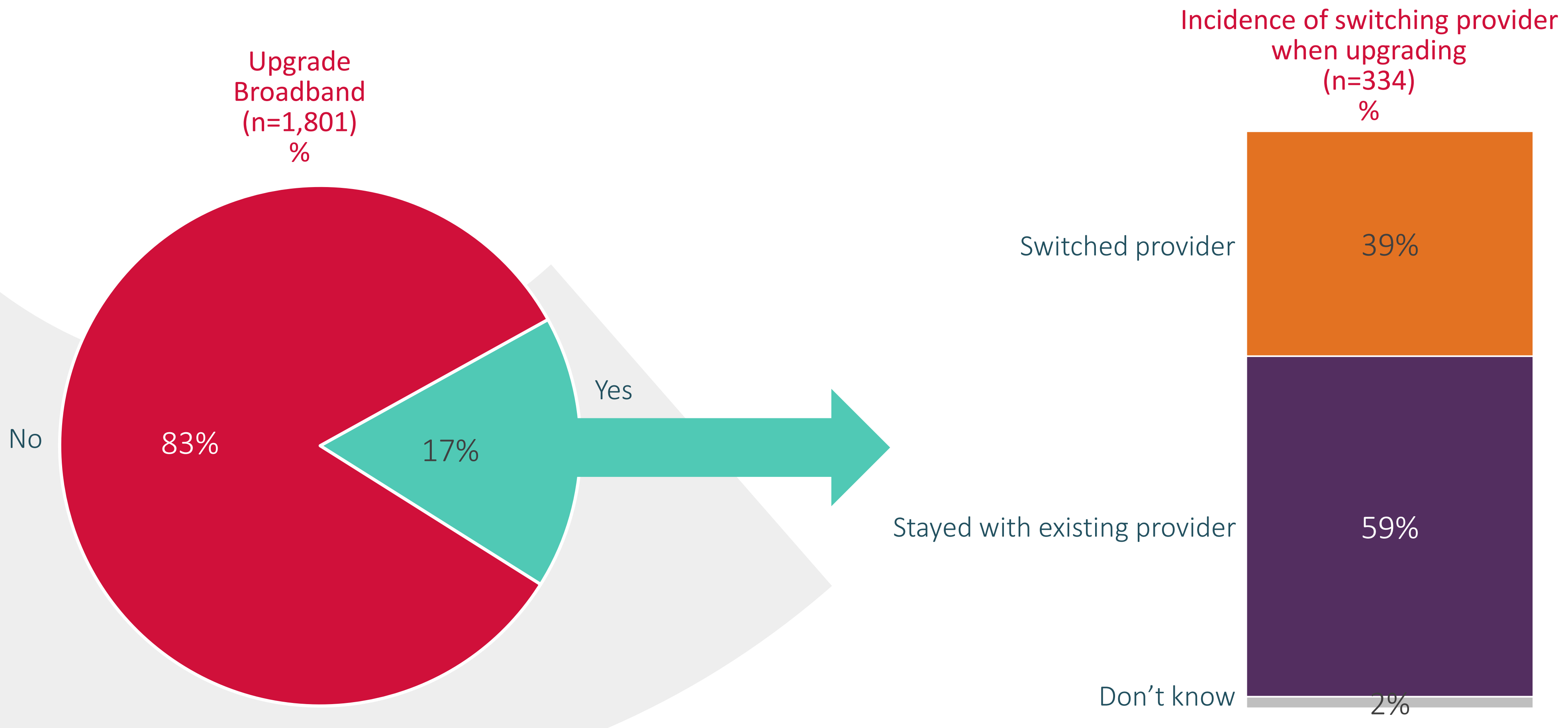


Q.40 What is the maximum claimed 'up to' download speed for your main broadband service?

(Base: All Definitely/Maybe Know Download Speed, n=634)

Incidence of upgrading to a faster speed within past 2 years

17% of respondents have upgraded their broadband to a faster speed in the past 2 years, with the majority staying with their existing provider (59%).

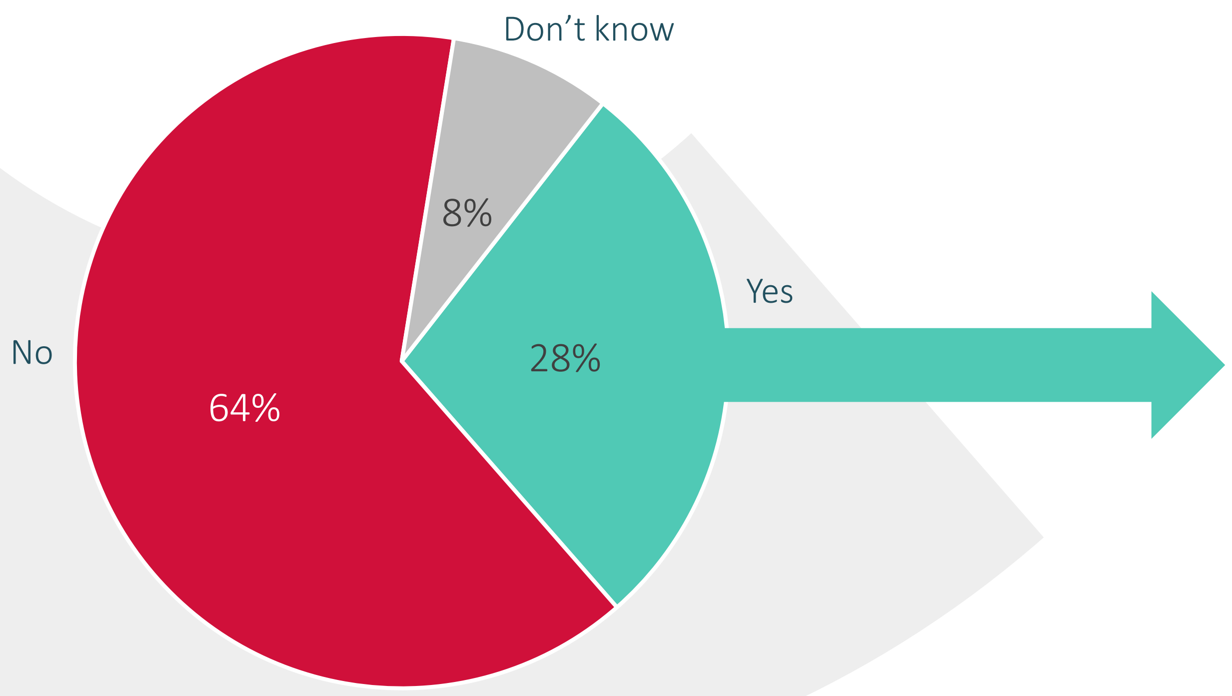


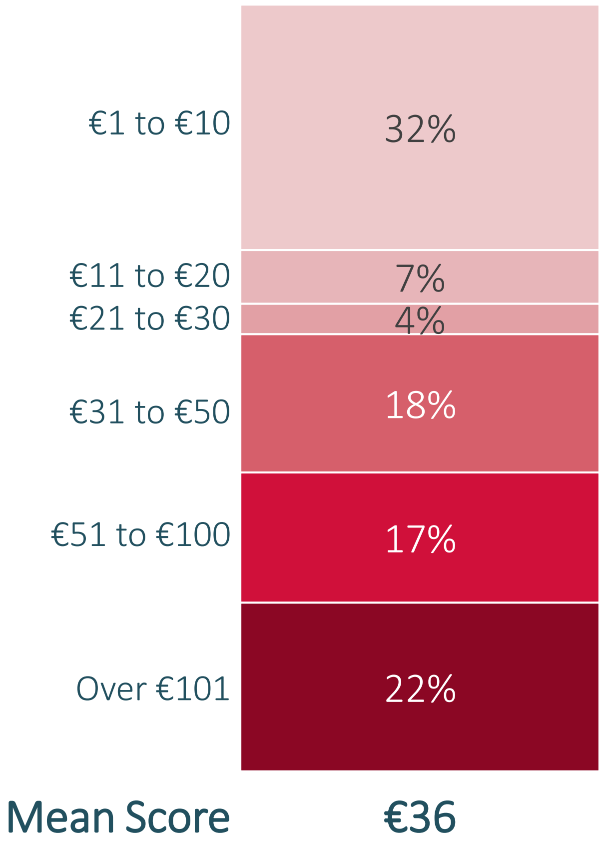
Q43 Over the past 24 months, have you upgraded your broadband to a faster speed?
(Base: (All with Broadband Access, n=1801)

Q44 In upgrading your speed, did you switch provider, or retain your existing provider?
(Base: (All upgrading Broadband to faster speed, n=334)

Additional Connection Charge for Upgrading Speed

28% paid an additional connection charge. On average respondents paid €36 in additional connection charge for a higher speed.





Q45 Did you pay any additional connection charge for upgrading your broadband speed?

(Base: (All switched provider and upgrading, n=134)

Q46 How much did the additional connection charge cost?

(Base: (All paying additional connection charge, n=38*)

*Caution: Small Base Size

10.

Key Findings

Key Findings from this Survey

- 84% of the nationally representative sample of telecommunication decision makers aged 18+ in this survey have access to fixed broadband at home. Access to fibre based broadband has increased significantly from 2017 and now stands at 40% of all broadband connections (versus 19% in 2017).
- The average length of time households are accessing the internet according to the survey is 5 hours per day. Those with fibre access are most likely to use the internet for streaming/downloading, watching live TV, working from home and gaming.
- 39% of households in the sample have access to and use a home phone - which is down significantly from 2017 where the corresponding figure was 57%.
- Incidence of bundling broadband services stands at 62% of all households surveyed. This figure is very similar to that reported in 2017 at 60%. A broadband and TV bundle is the most common bundle type in the 2022 survey, representing 32% of all bundles. The most common bundle type in 2017 was broadband, TV and home phone.
- Average spend per bundle, per month is unchanged from 2017 at €75 and is higher for those with fibre access (at €84 per month). The average spend on standalone broadband per month is €43 in 2022 - very similar to the spend from 2017.

Key Findings from this Survey

- 63% of surveyed households are in a contract with their current service provider, slightly higher than reported in 2017. 12 month contracts are the most common, representing 73% of all contracts. The average length of time customers have been with their current supplier is 3.68 years - longer than reported in 2017 at 2.92 years.
- In the SSNIP analysis the majority of households claimed they would 'do nothing' in response to a €4 increase in the price of broadband, whether in a bundle or standalone.
- Incidence of switching broadband supplier in the past three years stands at 16% of households surveyed, very similar to 2017 where 19% of households reported having switched within this same time period. In 2022, switching incidence is lowest in Dublin at 12% and among Virgin Media customers, at 20%. Cost and faster speeds are the two main drivers of market switching, with faster speed a core reason in ComReg Region 1.
- Claimed knowledge of maximum broadband speeds in households stands at 32% which is higher than reported in 2017 at 22%. It is important to note this data is based on respondents claimed knowledge of broadband speed rather than actual speed. The average claimed maximum download speed is 164Mbps.
- 54% of households surveyed have heard of National Broadband Ireland of those 32% claimed to be within the NBI Intervention Area.

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