Commission for
Communications Regulation

Consumer ICT Survey
Q2 2010

A Review of Findings by

MillwardBrown
Lansdowne

July 2010

Presentation Outline

- **Methodology**
- **Research Findings**
  - Fixed line market
  - Mobile market
  - The Internet and Broadband
  - Broadcasting
- **Conclusions**

Methodology - I

- The following report is based on research conducted by Millward Brown Lansdowne among a nationally representative sample of **persons aged 15 to 74 throughout the Republic of Ireland.**
- In total **1,007** persons were interviewed.
- The survey asked consumers about their awareness and usage of ICT services. The survey was conducted via face to face in-home interviewing, between the 31st of May and the 17th of June 2010.
- It should be noted that not all responses in this survey necessarily represent the views of bill payers only, as the sample included both respondents who were bill payers and non-bill payers.
- The survey results reflect the attitudes of respondents to the questions posed (some of which were hypothetical in nature), and may not necessarily reflect real life behaviour.
- Interlocking quotas were set on gender and age and non interlocking quotas set on region and social class.
- Data has been weighted in order to reflect the demographic profile of the adult population in the Republic of Ireland, based on the most recent data available from the CSO. However, all base sizes depicted are shown as the unweighted figures, and as a result there may be slight differences between weighted percentages and unweighted bases.
- Where possible, comparisons with previous research have been included.

Methodology -II

- The accuracy of this survey is estimated to be +/- 3%.
- A "*" in the data indicates that less than 1% of respondents gave that response and a "-" indicates that no one selected that response.
- Social Class definitions, as referred to in this report are largely as follows (based on the occupation of the chief income earner in the household):

  - ABs are professionals

  - C1s are white collar workers

  - C2s are blue collar workers

  - Ds are unskilled workers

  - Es are those relying on State assistance

  - Fs are those in the farming community

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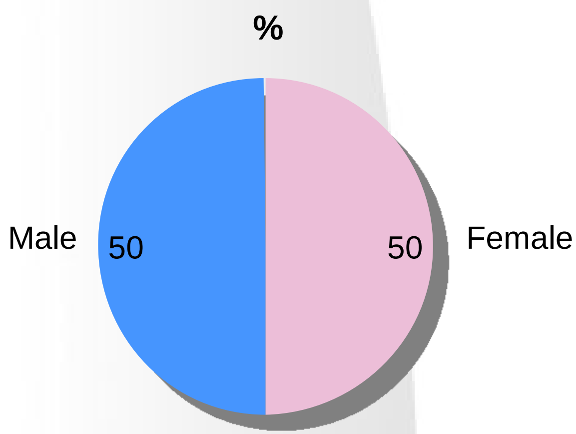
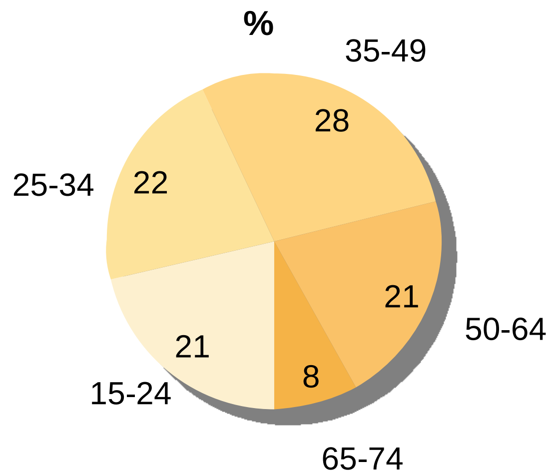
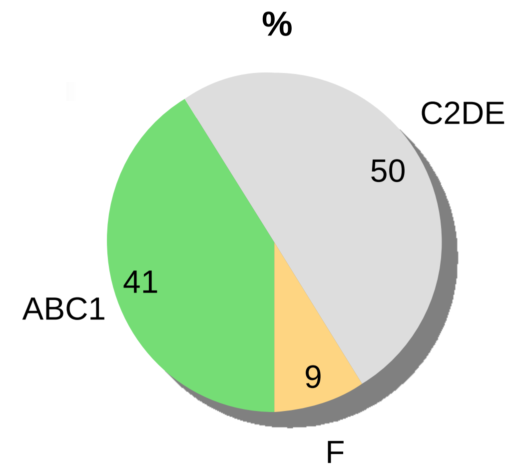
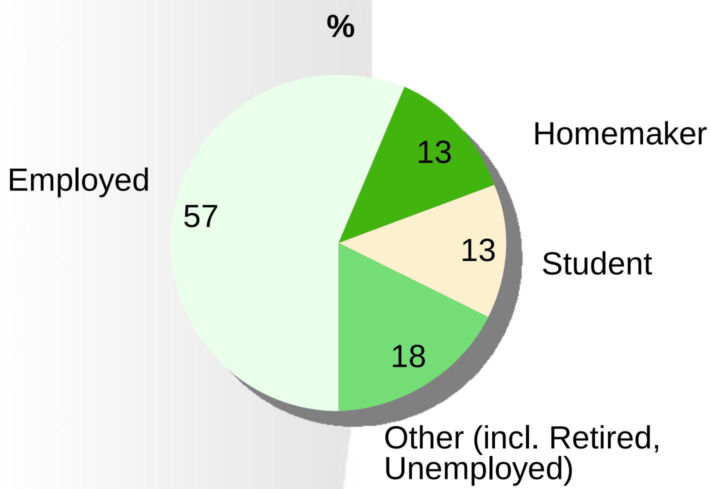
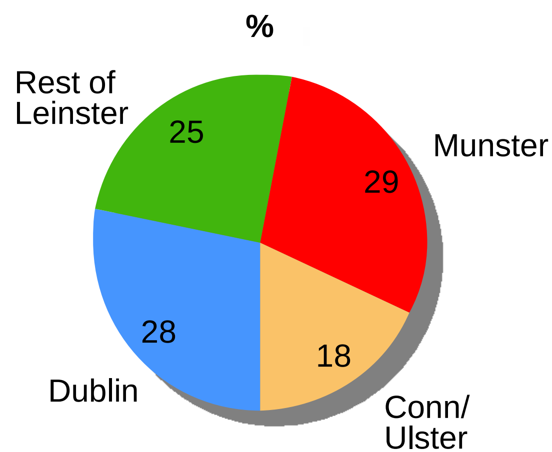
Analysis of sample











Base: All Adults 15-74

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Fixed Line

Continued increase in mobile phone penetration, with fixed line recovering

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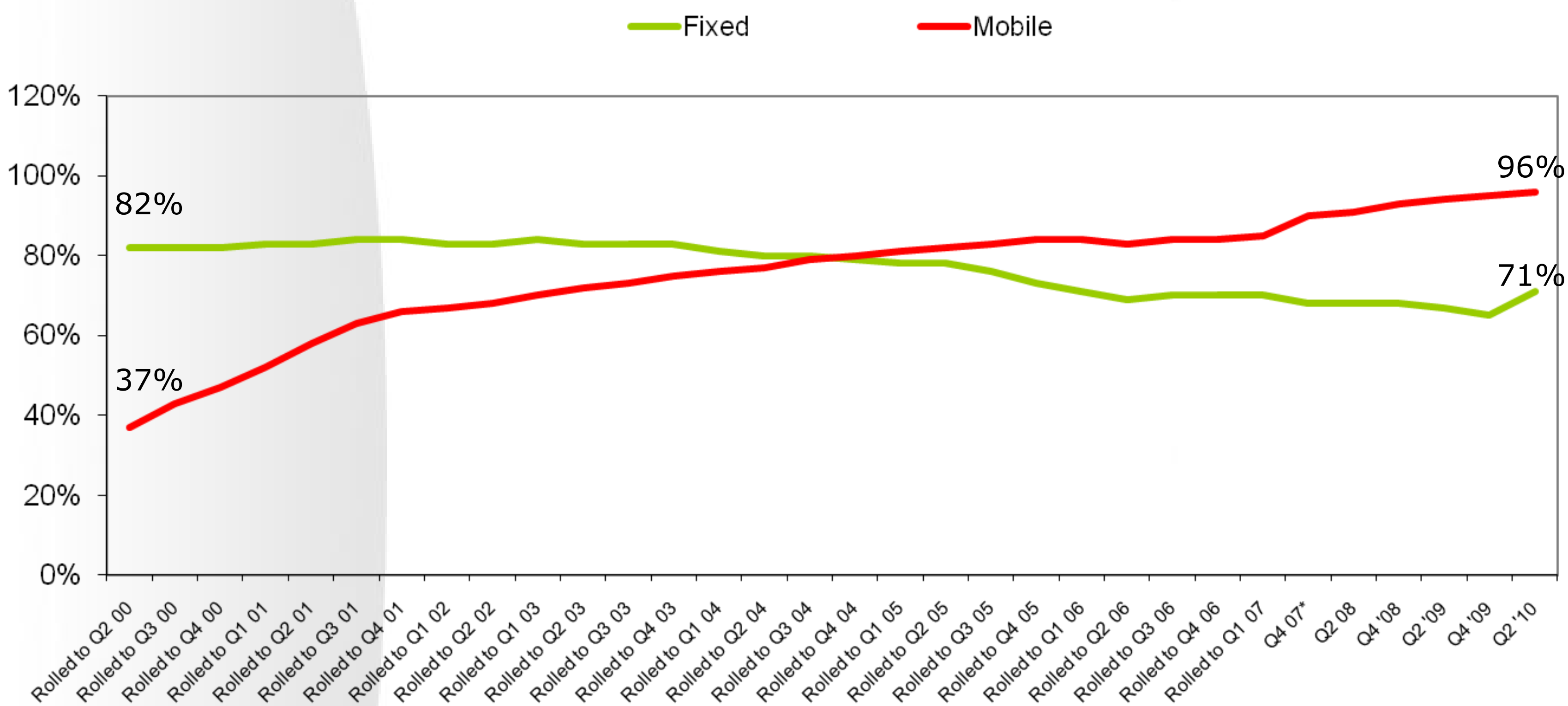
Q.	Do you have a residential fixed line phone in your home?
Q.	Do you personally own a mobile phone?



Base: All Adults (n=1,007)

Note: From Q4'07 data is not rolling data, due to gap in research in 2007

Mobile phone usage influences not having a fixed line phone

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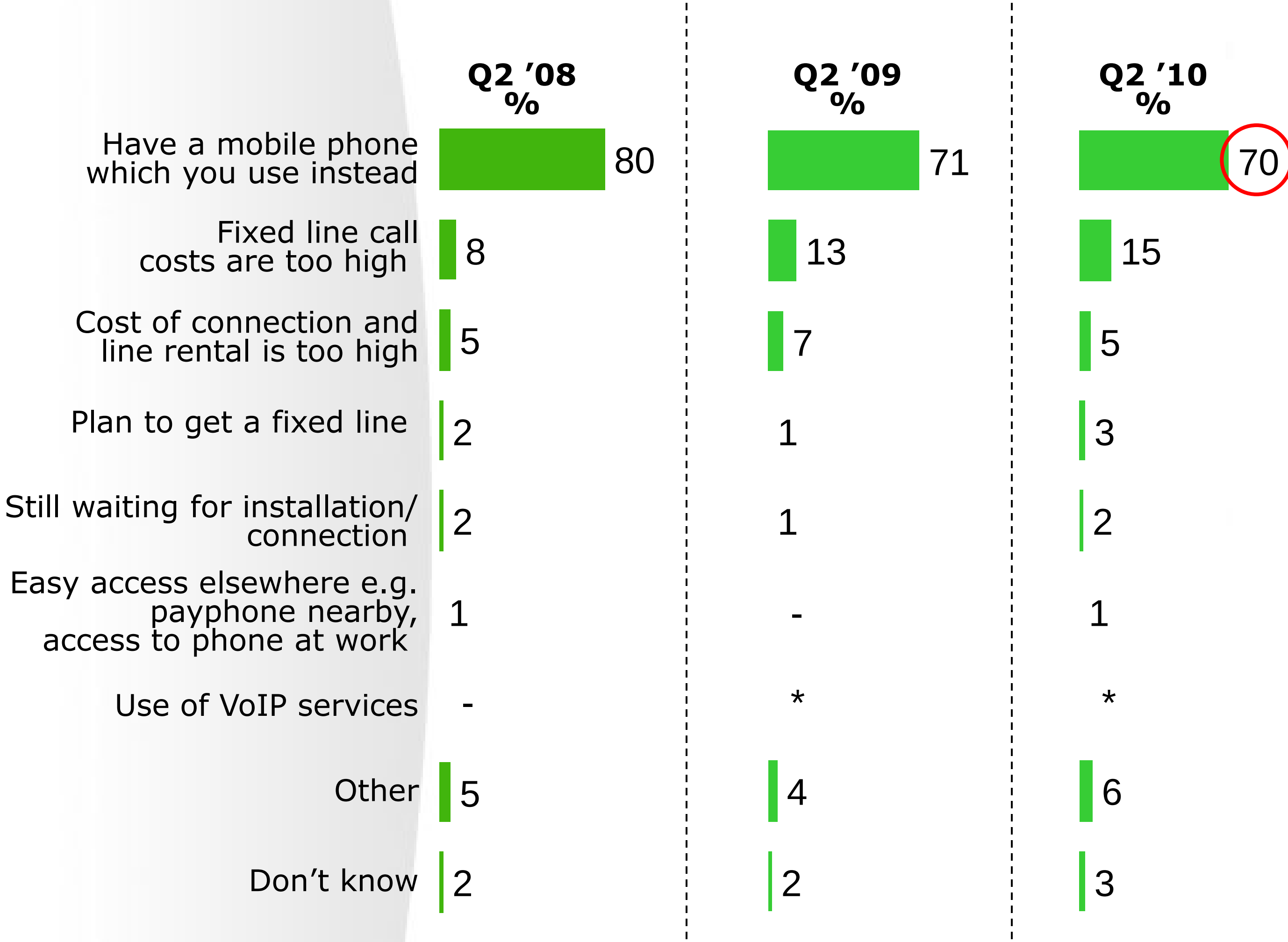
Q. What is your main reason for not having a fixed line telephone in your home?



- Similar to Q2 '09 seven in ten without a fixed line say that they have a mobile phone which they use instead of a fixed line.
- Having a mobile phone is more likely to be cited as a reason for not having a fixed line by ABC's (74%) those who use the internet (75%), and also those with home Internet access (75%). It is also higher among those living in Dublin (80%).

Base: Those Who Do Not Have A Fixed Line (n=285)

Fewer than two thirds now use Eircom as their fixed line supplier

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Q. Which, if any, of the following companies do you use for your residential phone service?

	Q4'07 %	Q2'08 %	Q4'08 %	Q2'09 %	Q4'09 %	Q2 '10 %
Eircom	78	77	79	77	71	64
Vodafone+	-	-	-	-	2	9
UPC (Chorus/ntl)	1	2	2	3	6	8
Perlico+	7	6	6	4	5	6
BT Ireland~	5	6	5	6	7	4
Imagine Group#	2	2	2	1	1	1
Talk Talk/Tele2	2	2	1	2	1	1
Smart	-	-	1	1	2	1
IFA	-	1	-	2	1	1
Euphony	-	-	-	-	1	1
Other*	2	3	1	3	1	2
Don't know	2	1	2	1	1	2

- Eircom's residential share has dropped again in Q2 '10 and is now at 64%.
- A third of fixed line users use a supplier other than Eircom. C1's (38%), those living in Dublin (39%) and those who have home internet access (38%) more likely to use a provider other than Eircom.

Base: All Who Have Fixed Line (n=722)

Response Includes Gaelic, Cinergi and Access.
+ Part of the Vodafone Group
~as of 1st September 2009 BT's residential customer base were transferred to Vodafone
*Answers under 1% included in Other

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Historical view of Eircom’s fixed line market share

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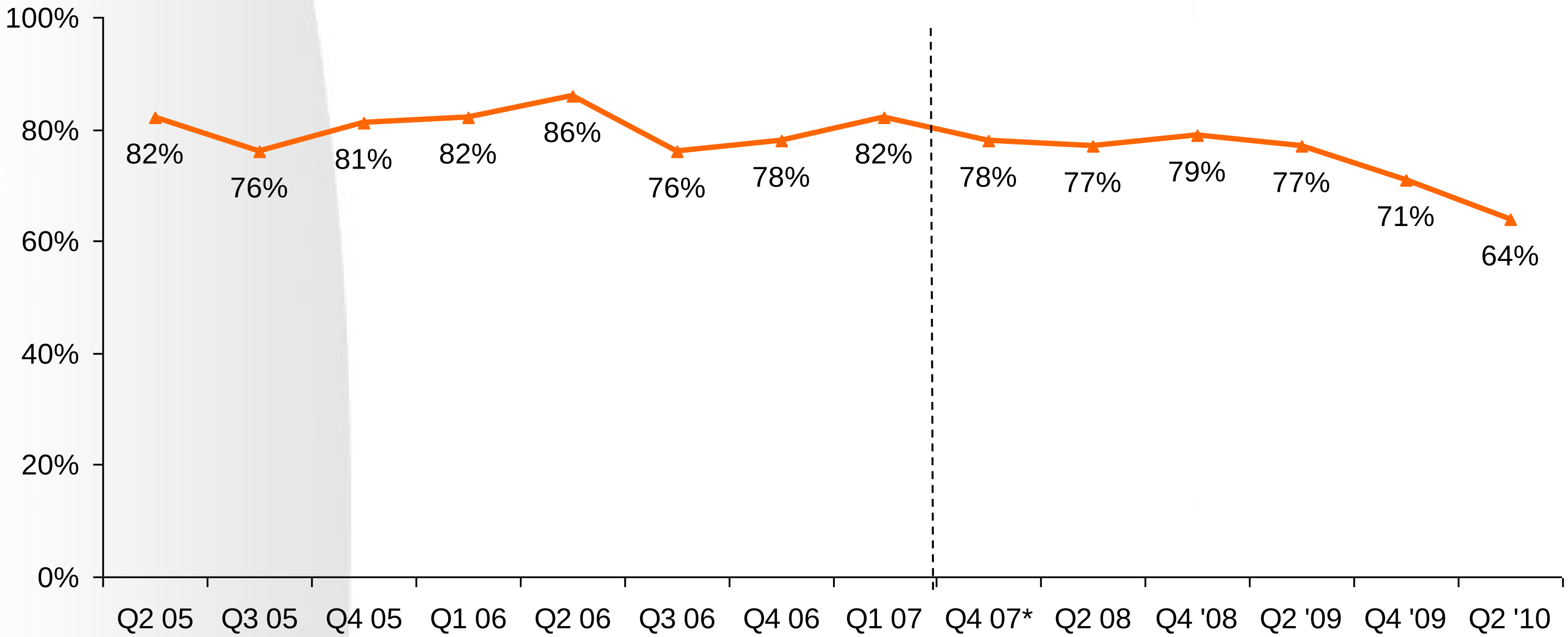

- This chart plots Eircom’s market share from research conducted in the residential market since 2005.
- According to these figures, Eircom’s market share in the residential market has fallen again since Q4 ‘09 and now stands at 64%.
- At its highest, Eircom’s market share stood at 86% in Q2 2006.

Base: All Who Have Fixed Landline (n=722)

Under half of fixed line users have ever switched their fixed line provider

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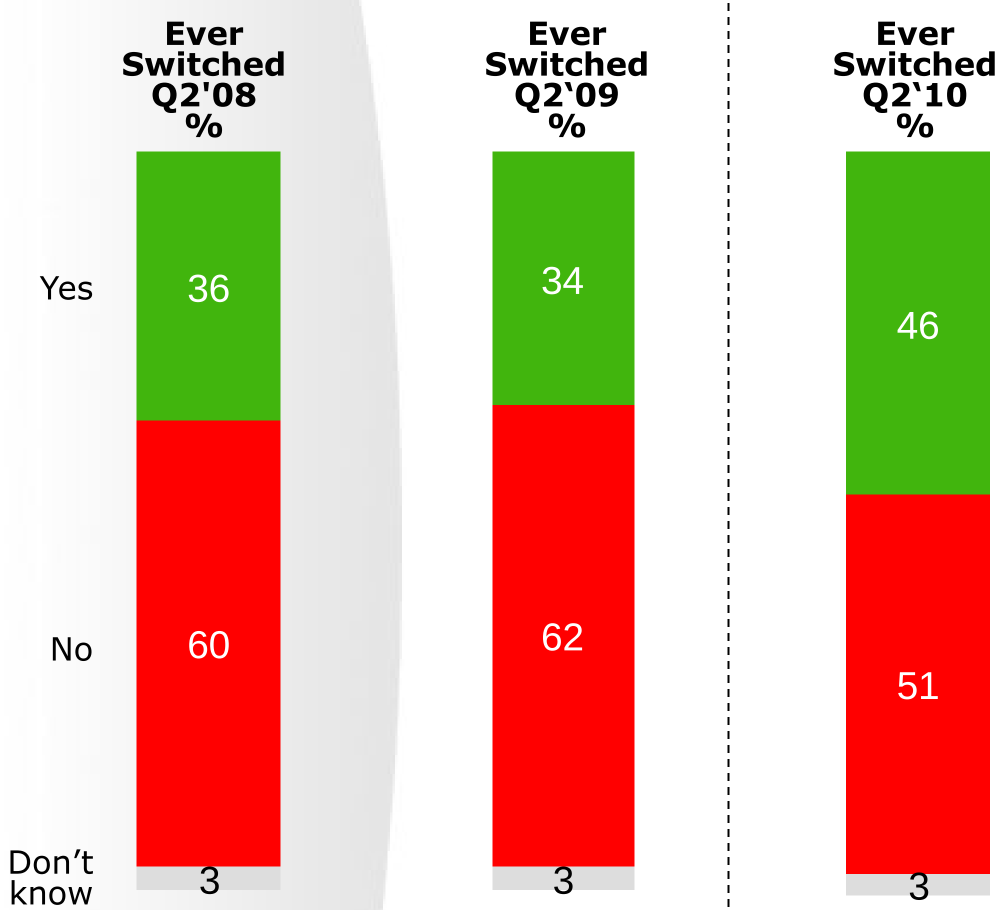
Q. Have you ever switched your fixed line home phone supplier?



Q2 '10 % ever switched
Mobile 33%

Yes - Higher Among

Switched ISP in last 12 months	91%
Work in home	56%
Age 35-49	53%
Home internet	50%

- Compared to the same quarter last year (34%) the percentage of fixed line users (46%) who claim to have ever switched fixed line provider has increased.

Base: All Who Have Fixed Line (n=722)

Recent switching activity among fixed line users

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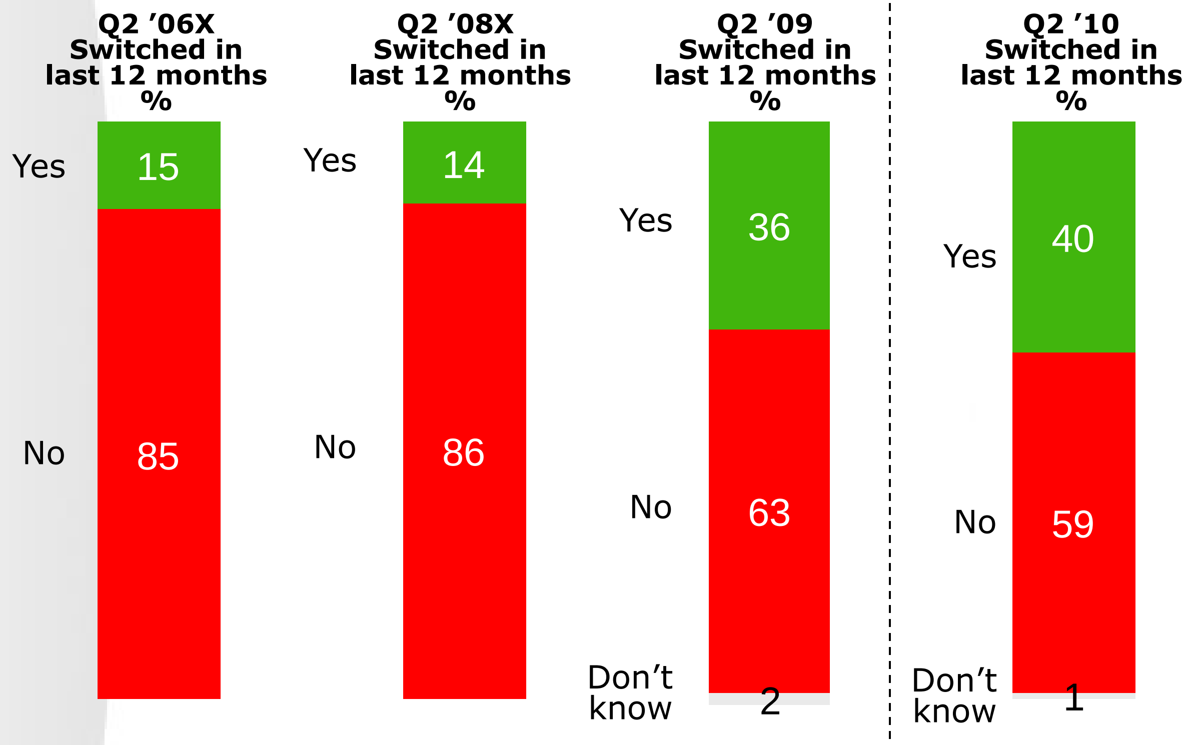
Q. Have you switched your fixed line home phone supplier in the past twelve months?

Q2 '10 % switched last 12 months

Mobile	25% (all switchers)
Internet Service Provider	15% (all users)
TV Provider	7% (all users)



- Of those customers who have ever switched their fixed line phone, four in ten switched in the last 12 months. At an overall level, about 18% of those with a fixed line have switched operator in the last 12 months.

Base: All Who Have switched (n=336)

X Note: Previously asked of all with fixed line

Process of switching seen as easy by majority

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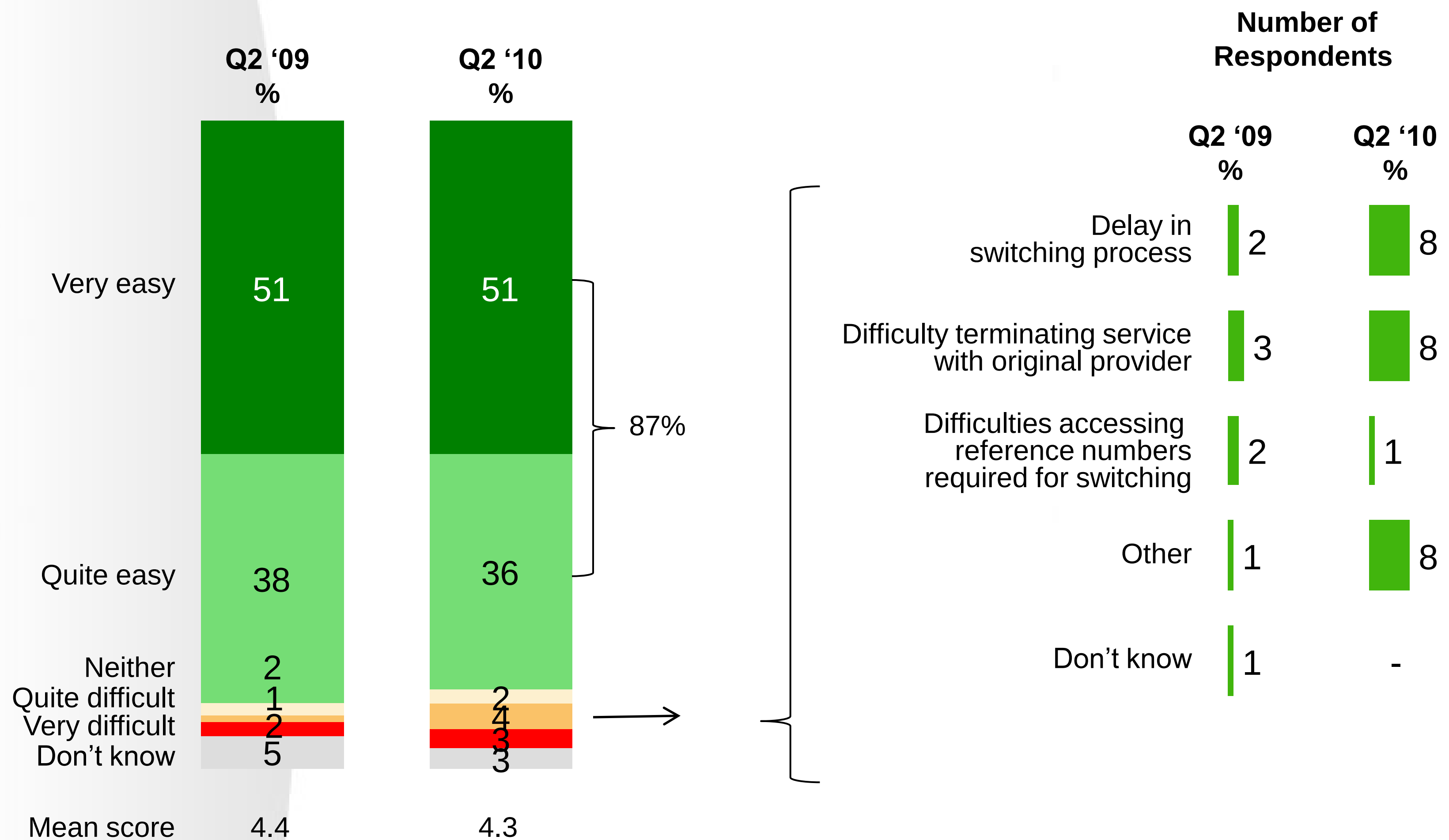
Q. Was the process of switching fixed line home phone provider…
For what reason/s was the switching process difficult?



Base: All Who ever switched (n=336)

Base: All Who experienced difficulties switching (n=24*)

* Caution small base

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3 in 10 fixed line users are switching back

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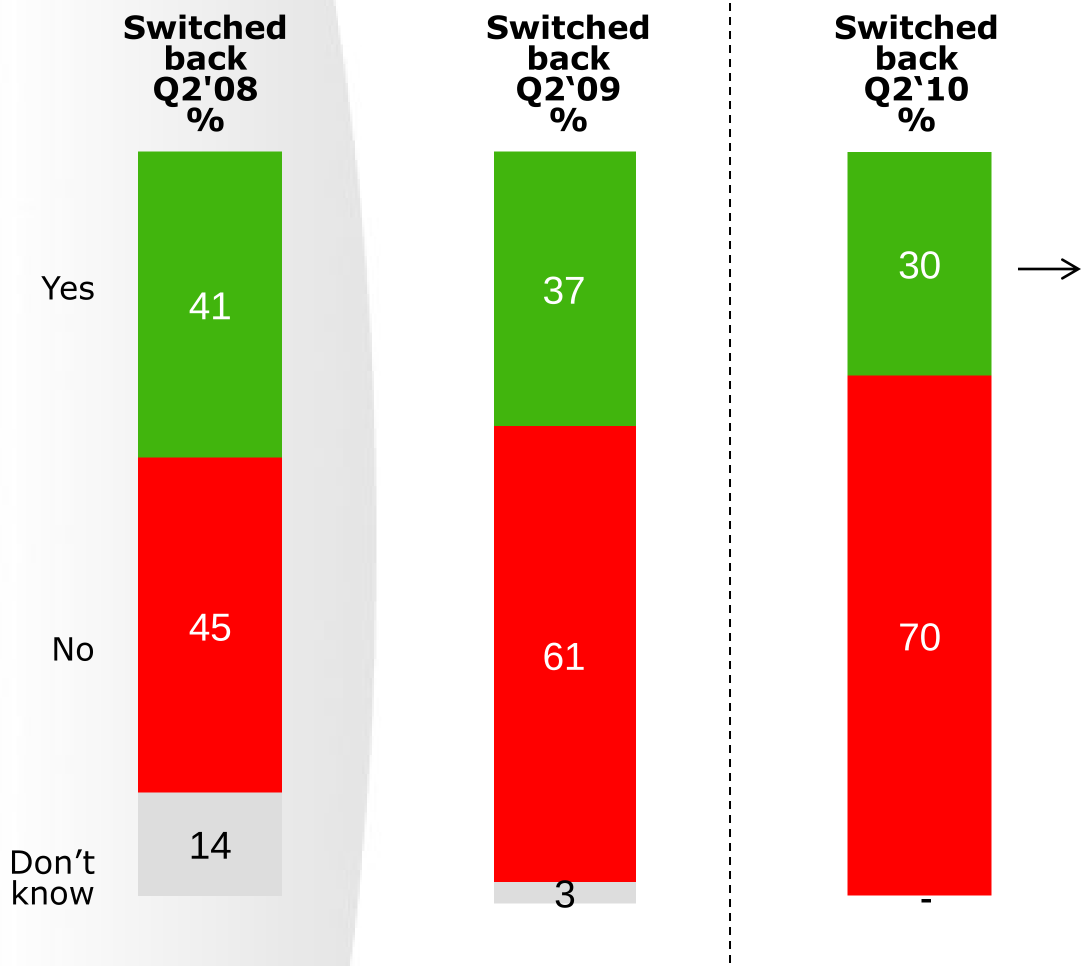
Q. Have you switched back to your previous fixed line home supplier since the initial switch?



Q2 '10 % switched back

Mobile	15%

Yes - Higher Among	
Fs	42%
DEs	41%
Females	35%

- There is a downward trend of fixed line users switching back to their original provider – although 3 in 10 still do.

Base: All Who Have Ever Switched (n=336)

Reasons for switching back to original provider

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Q. Why did you switch back to your original fixed line home phone provider?

	Q2 '09 %	Q2 '10 %
Savings with new provider did not meet expectations	25	31
Contacted by previous provider with better offer	21	21
Quality of service was inferior to previous providers service#	-	14
Too much hassle receiving 2 bills - line rental & calls#	-	9
Received better customer service from previous provider	24	7
Quality of calls was better with previous provider	6	5
Difficulty getting faults repaired with new provider	10	-
Other	20	20
Don't know	7	8

- Savings not matching expectations (31%) and better offer from previous provider (21%) were the main reasons for switching back to original home phone provider.

New statements Q2'10

Base: All who switched back to original supplier (n=98)

Nearly 6 in 10 have contacted their fixed line provider's customer service

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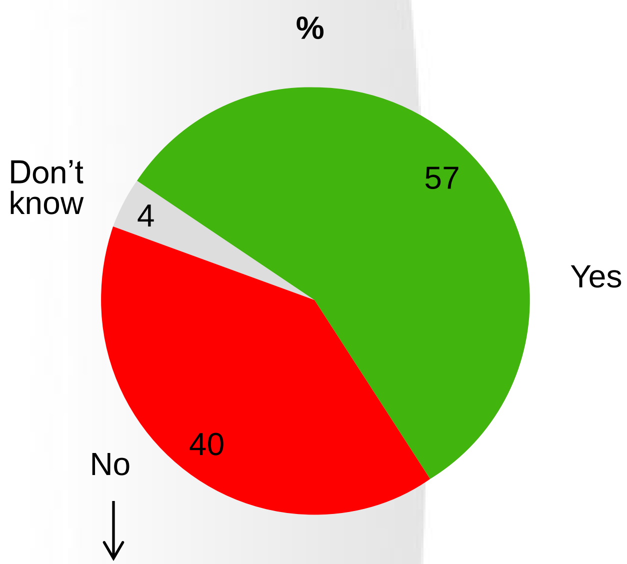
Q.	Have you ever contacted your home phone provider's customer service?
Q.	How satisfied are you with the standard of customer service provided by your fixed line home phone provider?

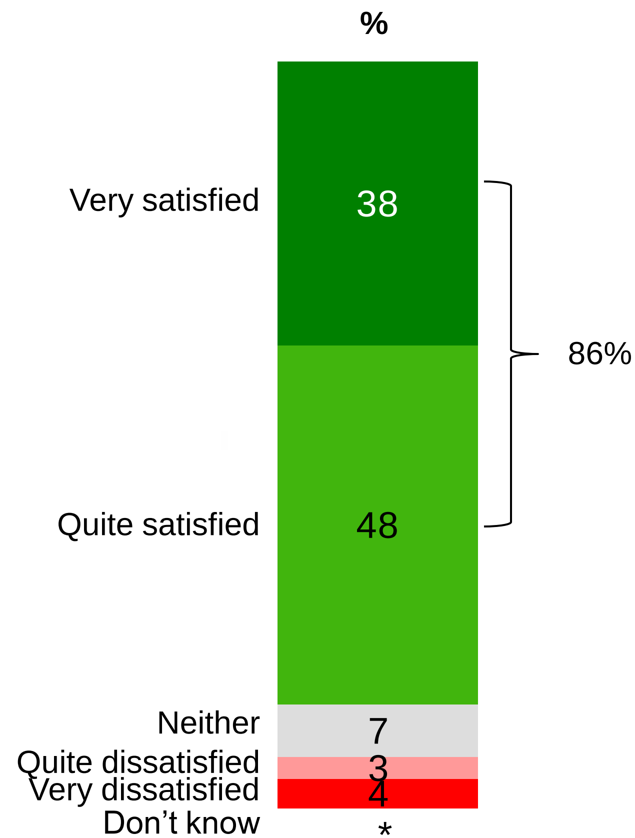
NEW



Higher Among	
18-24	51%
Fs	51%

Base: All With Fixed Line (n=722)

Higher Among	
ABs	67%
35-49	65%
Dublin	62%



Base: All Who Contacted Customer Services (n=420)

Minimum contract period: fixed line

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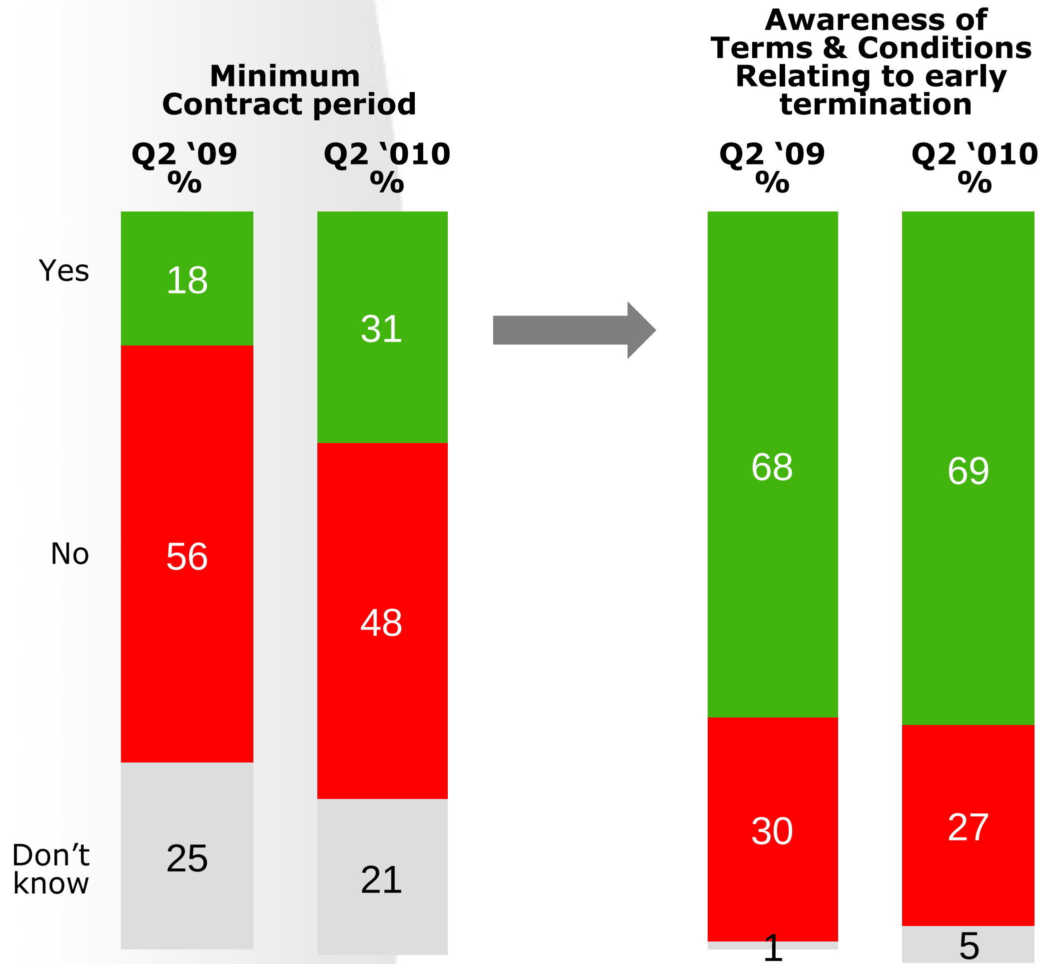
Q.	Does your contract for your fixed line home phone with your service provider have a minimum contract period?
Q.	Are you aware of the terms and conditions relating to early termination of your contract for your fixed line home phone?



Base: All who have fixed line (n=722)

Base: All aware of minimum contract period (n=233)

- A third of fixed line users are aware that there is a minimum contract length associated with their fixed line home providers up from 1 in 5 in 2009. While those who 'don't know' have decreased, 1 in 5 still don't know whether or not there is a minimum contract period.
- Those who say there is no minimum contract length (48%) are more likely to live in Connaught/Ulster (58%), work in the home (56%) and use Eircom for their fixed line (58%)
- Those fixed line users who have never switched operator (61%) are also more likely to say there is no minimum contact length.
- Of the 31% who say that there is a minimum contract period on their home phone service, nearly 7 in 10 of this group (69%) claim to be aware of the terms and conditions relating to early termination of the contract.

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Mobile market

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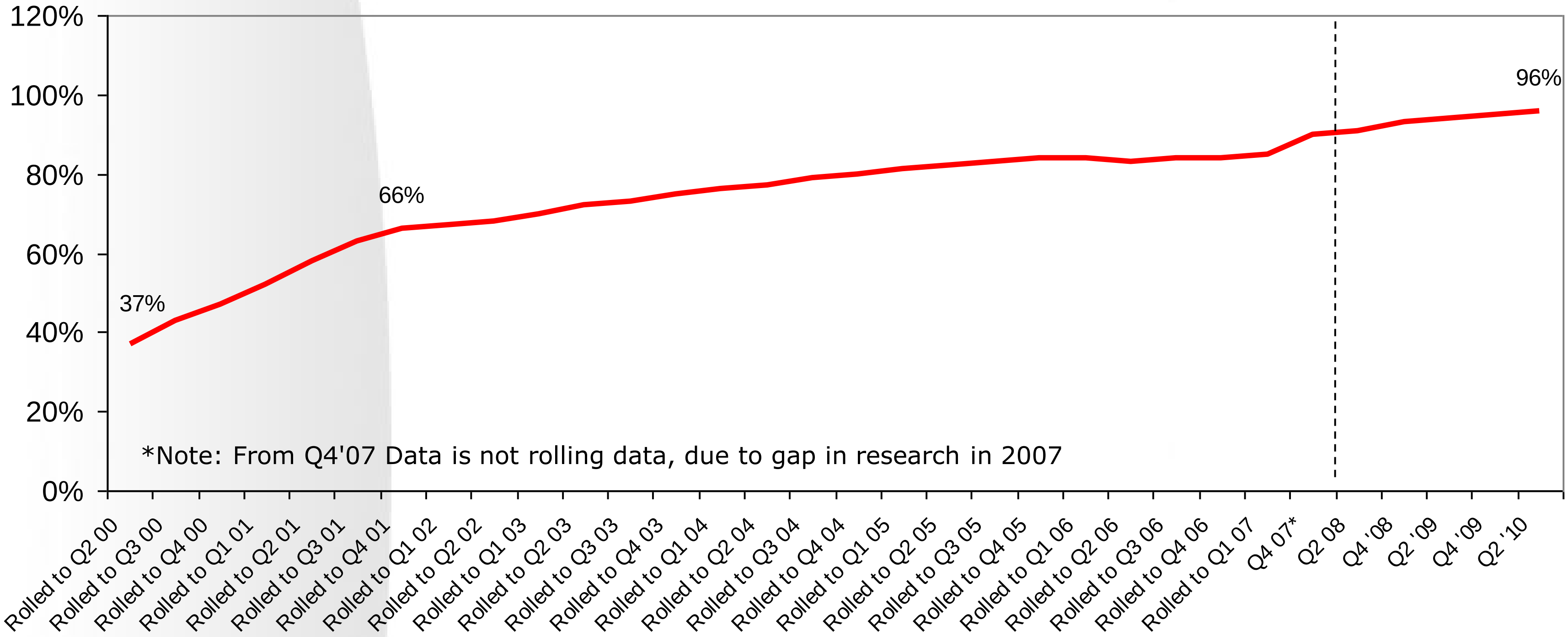
Trends in mobile phone ownership

Q. Do you personally own a mobile phone?



- Mobile phone Ownership is nearly universal, although it remains lower among certain groups most notably those aged 65-74 (82%) and those working in the home (89%).
- Additionally, those who do not use the internet (88%) or have a home PC/laptop (89%) are also less likely to have a mobile phone.

Base: All Adults (n=1,007)

Further increase in post-pay customers

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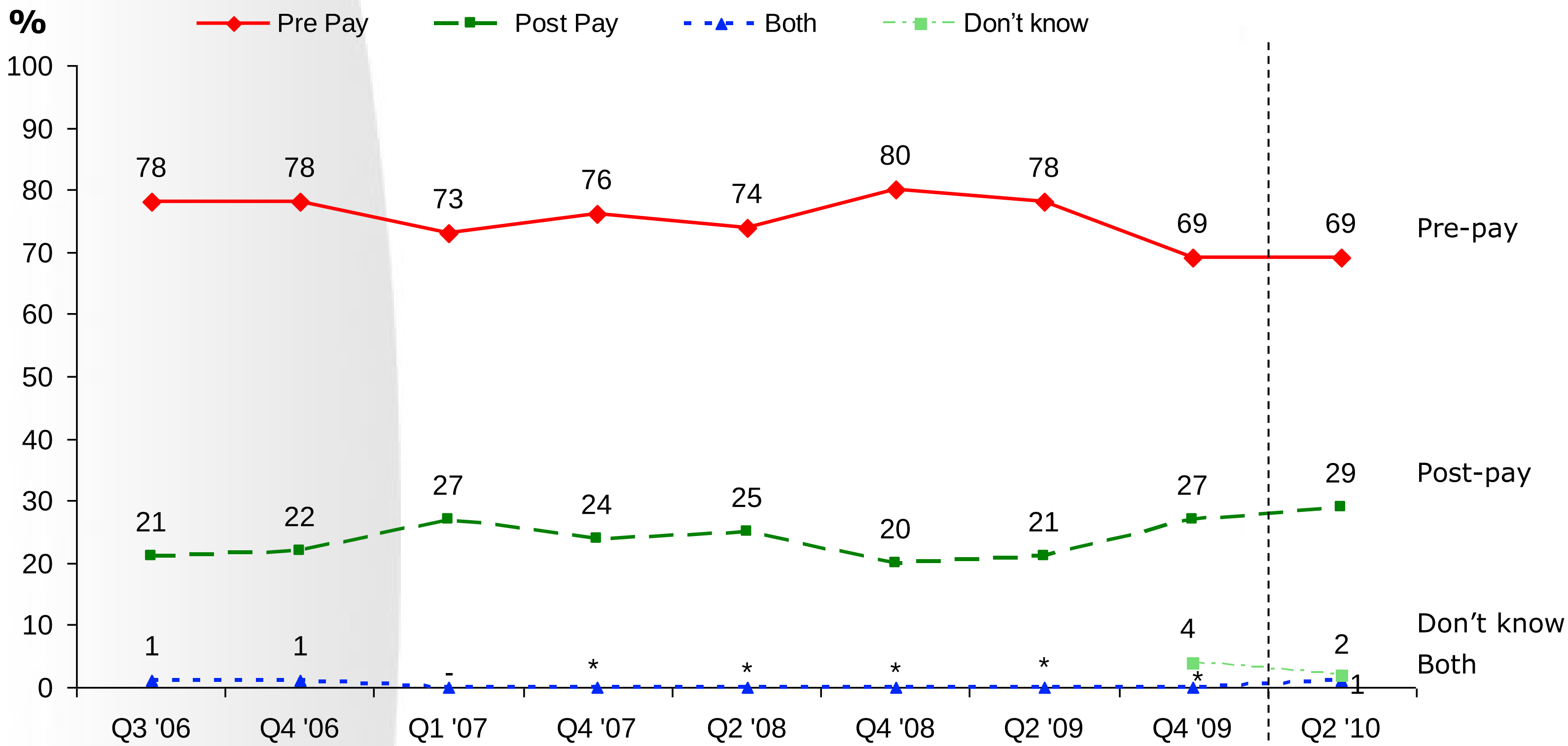
Q. Is your current mobile phone service one where you…



- The percentage of mobile phone users with pre-paid phones remains at just under 7 in 10, as the availability of more Post-Pay options in the market e.g. sim only and smart phone contracts become more prominent.
- Pre-pay use is higher among those <25years (94%) and those in the DE (85%) social group.
- Students (94%) and Meteor customers (81%) are more likely to be pre-pay customers.
- Those who rent (82%), and those who do not have Internet access at home (84%) are also higher users of pre-pay options.

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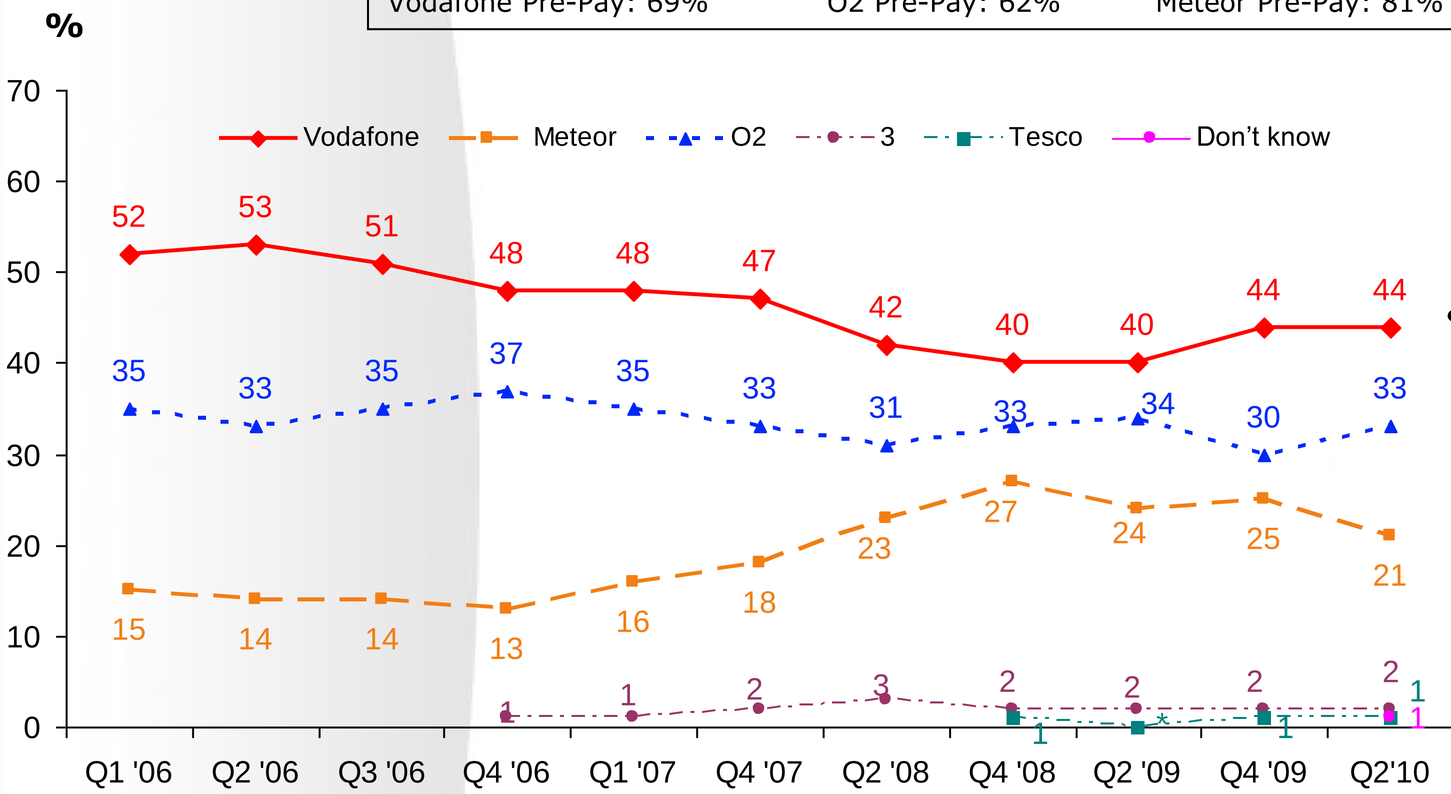
Mobile phone providers market share

Q. Who is your mobile phone supplier(s)?

Pre-Pay and Post-Pay Split by Provider #

Vodafone Post-Pay: 29%	O2 Post-Pay: 34%	Meteor Post-Pay: 17%
Vodafone Pre-Pay: 69%	O2 Pre-Pay: 62%	Meteor Pre-Pay: 81%



- Vodafone remains the provider with the highest market share (44%), a third of mobile users use O2 (33%), while 1 in 5 (21%) are Meteor customers.

Base: All Mobile Phone Users (n=969)
Don't knows account for balance

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Mobile phone providers market share

Q. Who is your mobile phone supplier(s)?

	Gender		Age						Social Class					Region			
	M (486) %	F (483) %	15-17 (37) %	18-25 (132) %	25-34 (234) %	35-49 (288) %	50-64 (221) %	65-74 (57) %	AB (141) %	C1 (321) %	C2 (239) %	DE (208) %	F (60) %	Dublin (282) %	RoL (244) %	Mun-ster (268) %	Conn/ Ulster (173) %
Vodafone	45	42	36	29	42	49	48	54	49	42	43	45	42	42	41	44	51
O2	32	33	29	21	35	34	37	37	34	32	33	29	42	34	35	30	31
Meteor	21	22	35	47	20	14	13	8	15	23	20	25	19	21	20	25	18

3 and Tesco Mobile bases too small to include

- Meteor continues to attract users aged 18-24 (47%) and Vodafone’s core customers are more likely to be in the 65-74 year age bracket (54%), while O2’s customers are more likely to be over the age of 25.

- At a regional level Meteor’s customers are more slightly likely to live in Munster (25%), while Vodafone has highest market share in Connaught/Ulster (51%).

Incidence of ever having switched mobile provider

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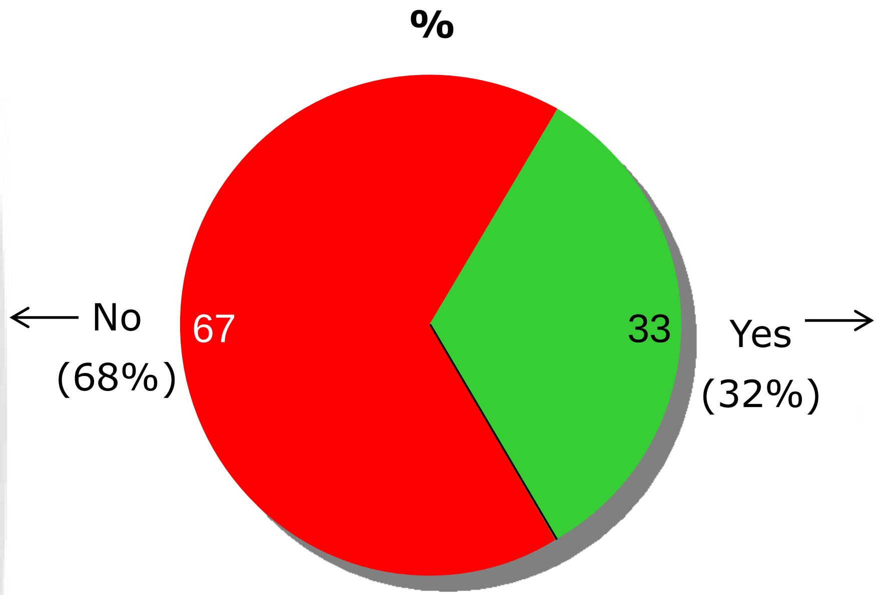
Q. Have you ever switched your mobile phone provider?

Q2 '10 % ever switched
Fixed 46%

No - Higher Among	
65-74	90%
50-64	78%
Work in home	76%
No internet use	75%
Fs	74%
No PC/Laptop	74%
No Home Internet	74%
Not switched fixed	71%



( ) Q2 '09 data

Yes - Higher Among	
18-24	48%
Renters	40%
Munster	37%
Switched ISP last 12 months	37%
Mobile phone only	37%

- A third of mobile phone customers (33%), have ever switched mobile phone provider.

Base: All Mobile Phone users(n=969)

A quarter of mobile phone switchers have switched in the last 12 months

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Q. Have you switched mobile operator in the past twelve months?

Q2 '10 % switched last 12 months

Fixed	40% (all switchers)
Internet Service Provider	15% (all users)
TV Provider	7% (all users)

- A quarter those who have switched mobile provider have done so in the last 12 months, down from 3 in 10 in Q2 '09.
- Recent switching activity is higher among those living in the Rest of Leinster (32%), those who have switched ISP in the last 12 months (37%*), and those who do not subscribe to an internet service (36%).

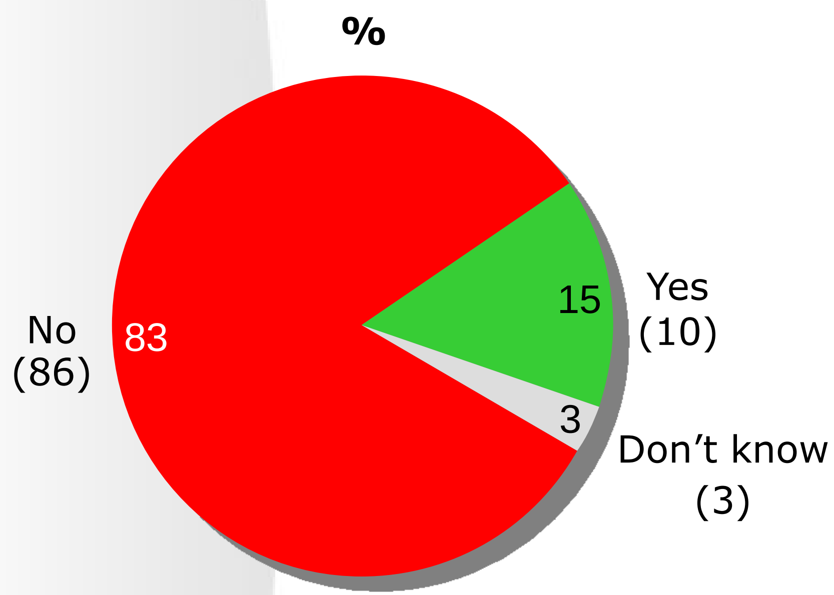
Base: All Mobile Phone users who have switched (n=314)

*Caution small base

Switching back to original supplier

Q. Have you switched back to your original mobile phone provider since you switched initially?

Q2 '10 % Switched back
Fixed 30%



( ) Q2 '09 data

- Only 15% of mobile phone switchers have switched back to their original provider; half the level seen in the fixed line market where this figure is 30%.
- Mobile phone switchers living in the Rest of Leinster (18%) or Munster (19%), as well as Vodafone (23%) and O2 (21%) customers were more likely to have switched back.

Base: All who switched Mobile Phone provider (n=314)

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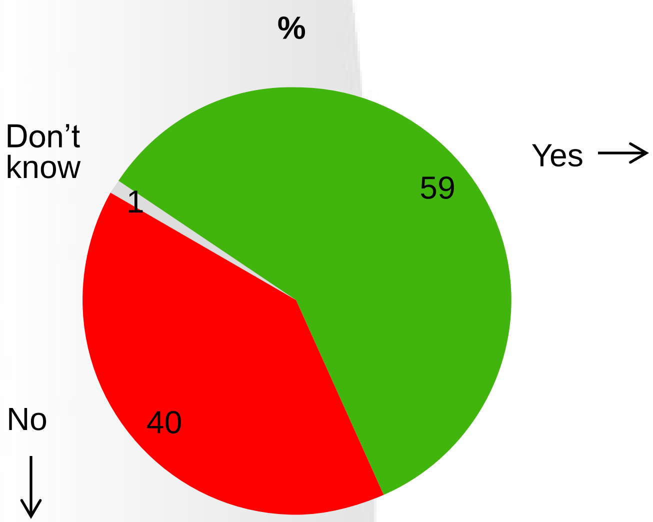
6 in 10 contacting mobile provider's customers service

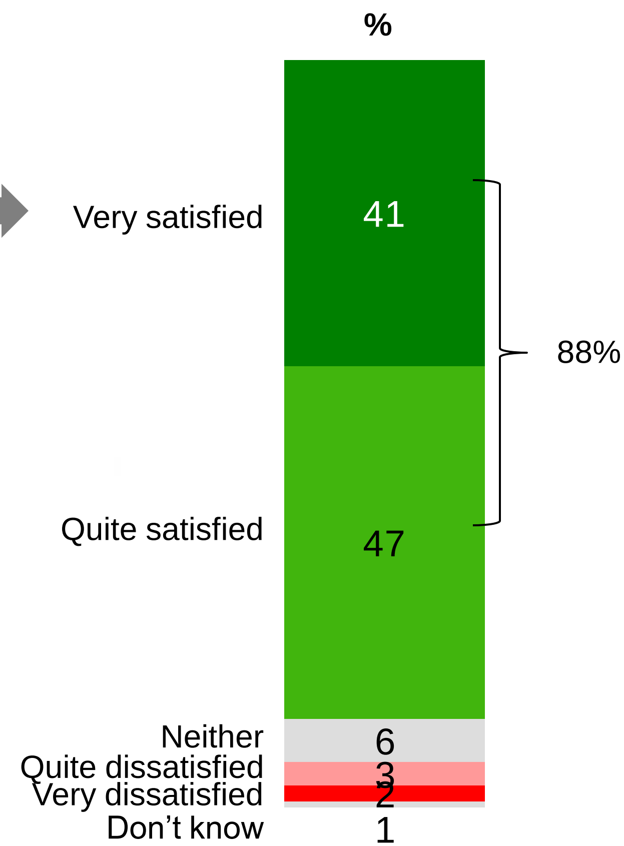
Q. Have you ever contacted your mobile phone operator's customer service?
Q. How satisfied are you with the standard of customer service provided by your mobile phone provider?

NEW



Higher Among	
Post Pay	73%
Switched mobile	71%
ABs	68%
18-24	64%
25-34	64%
Dublin	64%
Employed	63%

Higher Among	
65-74	68%
Work in home	52%
Fs	48%
Pre Pay	46%
Not switched mobile	46%
Munster	44%



Base: All Mobile Phone Users (n=969)

Base: All Who Contacted Customer Services (n=576)

Minimum contract period: mobile phone

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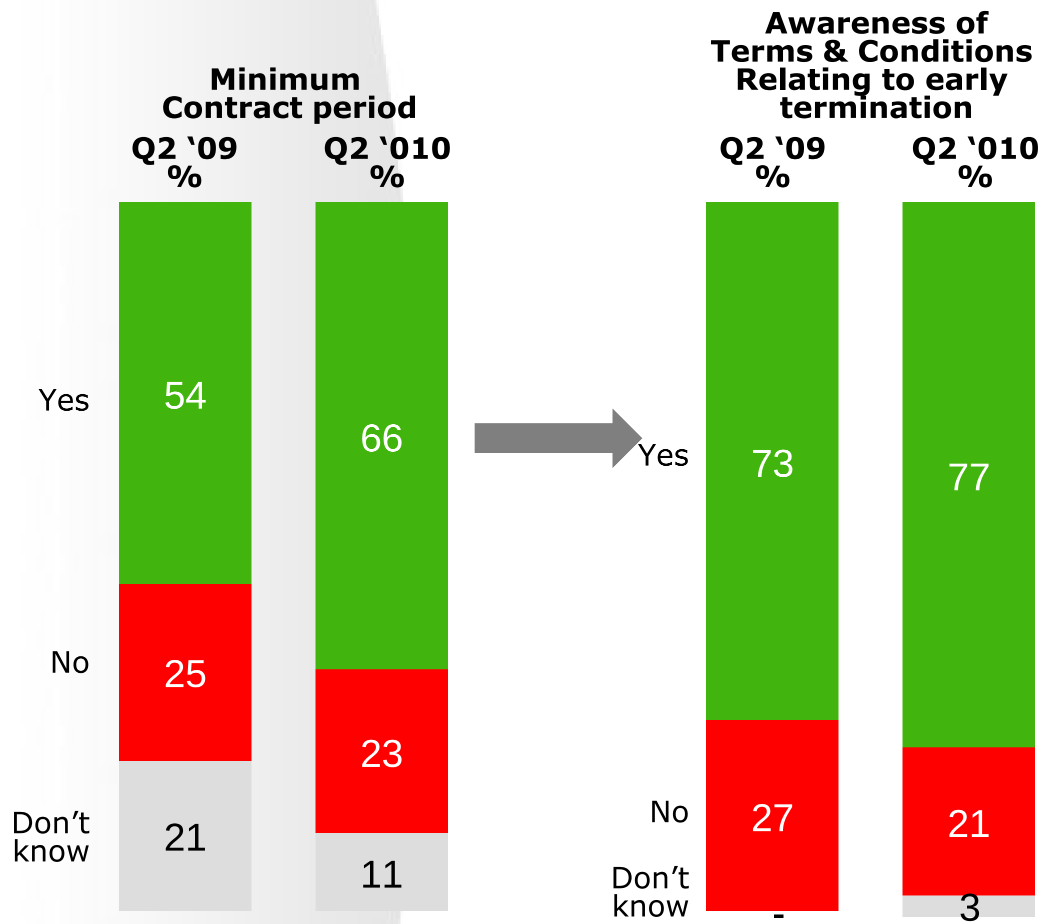
Q. Does your contract with your mobile phone service provider have a minimum contract period?
Q. Are you aware of the terms and conditions relating to early termination of your contract with your mobile phone service provider?



Base: All post pay Mobile Phone Users (n=308)

Base: All Post Pay Mobile Phone Users Aware of Minimum Contract (n=203)

- Two thirds of post-pay users claim to be aware of a minimum contract period in relation to their mobile phone contract.
- Nearly 8 in 10 (77%) of those aware of a minimum contract period also say that they are aware of the terms and conditions relating to early termination of their mobile phone contract.

Nearly half aware of SMS roaming charges being capped

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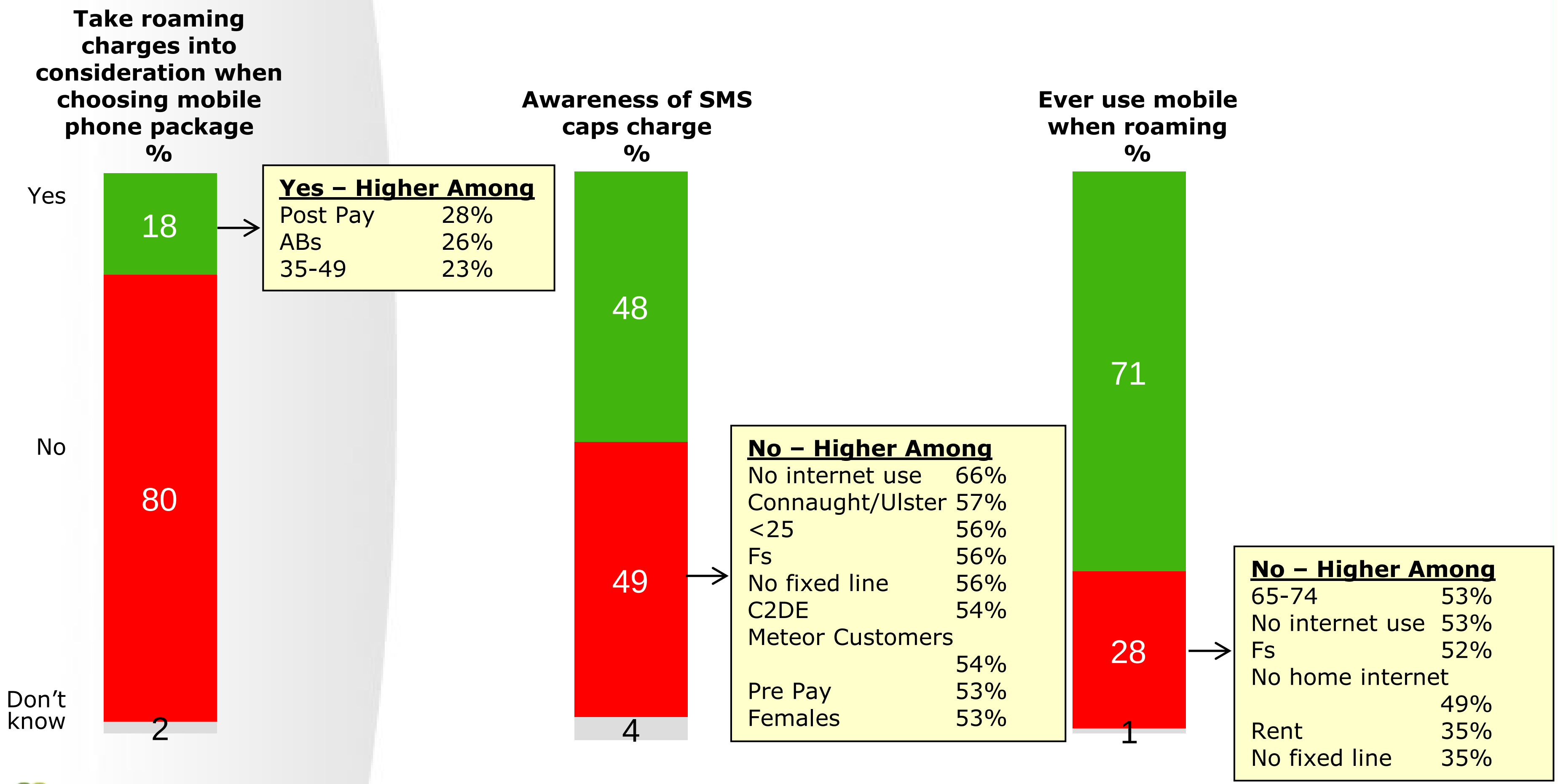
Q.	When choosing a mobile phone package do you take roaming charges into consideration prior to purchasing the package?
Q.	Are you aware that charges for making and receiving a call and sending an SMS (text) in the EU have been capped as a result of EU legislation?
Q.	Have you ever used your mobile phone abroad (i.e when roaming)?

NEW



Base: All Mobile Phone Users (n=969)

Two thirds of roamers received SMS from operator advising of costs while roaming

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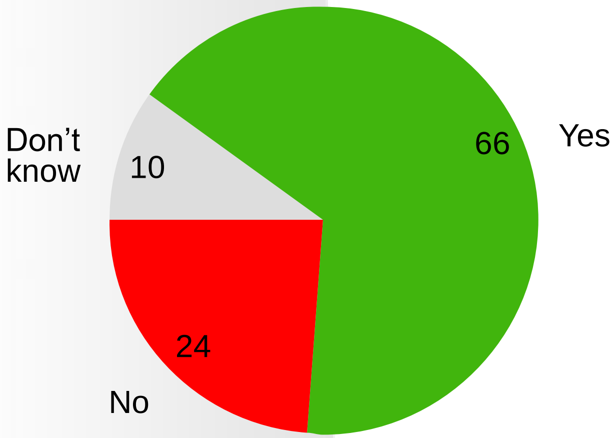
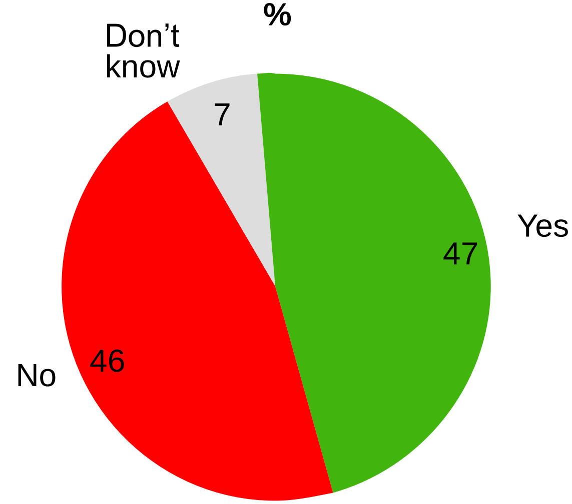
Q. When roaming in the EU have you received an SMS from your operator advising you of costs while roaming?
Q. Are you satisfied with the price of making and receiving a call and sending an SMS while roaming?

NEW

Received SMS from operator when roaming in EU with costs
%



Satisfaction with costs of calls and SMS while roaming
%



- Two thirds of mobile roamers have received a text from their mobile operator regarding costs of using their mobile phone while roaming.
- Nearly half of roamers are satisfied with the cost of calling and sending SMS while abroad. This is higher among DEs (51%), those working in the home (60%) and those who have not switched mobile provider (51%).

Base: All Who Have Ever Roamed (n=702)

The majority of roamers have not used the internet while roaming

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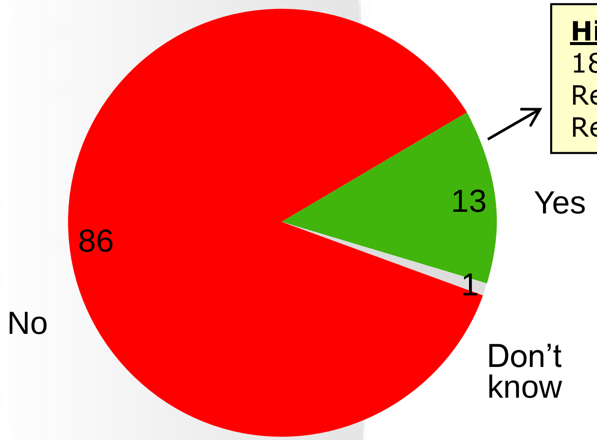
Q. Have you ever used the internet on your phone when roaming in the EU?
Q. Are you satisfied with the charges for using the internet (known as mobile data charges) while roaming in the EU?

NEW

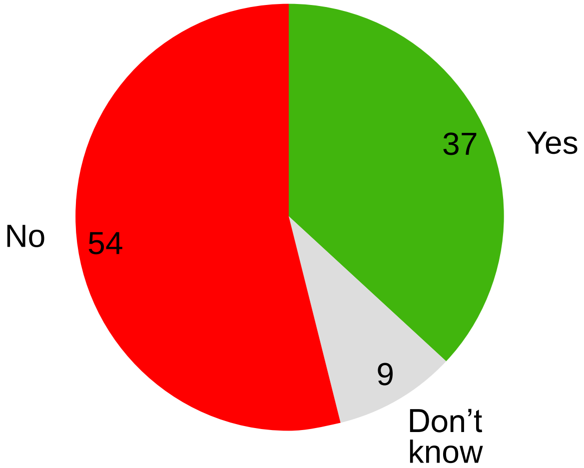
Used internet while roaming in the EU
%



Higher Among

18-24	25%
Rest of Leinster	18%
Renters	17%

Satisfied with mobile data charges while roaming in the EU
%



Base: All Who Have Ever Roamed (n=702)

Base: All Used Internet While Roaming in EU (n=91)

4 in 10 who used internet while roaming affected by bill-shock

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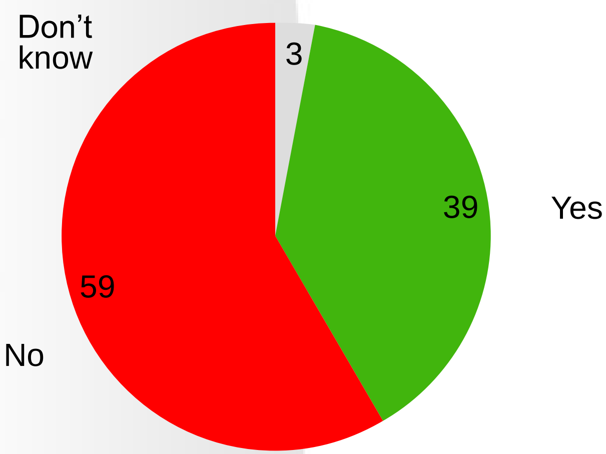
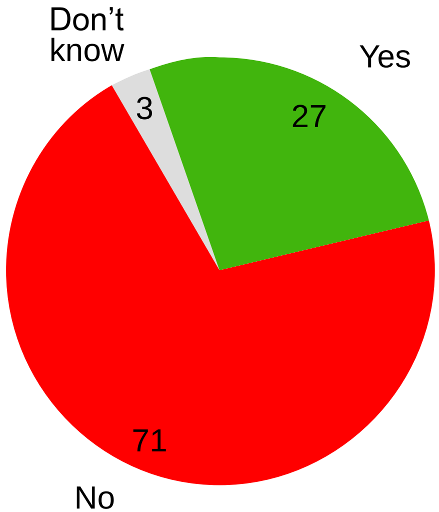
Q.	Have you ever been affected by roaming bill shock (unexpected high bill)?
Q.	Are you aware that mobile operators are required to offer you the option to set a financial or usage limit/cap for data roaming?

NEW

Ever affected by roaming bill shock?
%



Awareness that mobile operators required to offer data roaming cap
%



- Four in ten mobile roamers who used the internet while travelling in the EU have been affected by bill shock.
- Of those who have been affected the majority are not aware that mobile operators are required to offer a data roaming cap.

Base: All Who Used Internet While Roaming (n=91)

Base: All Affected by Bill Shock (n=36*)

*Caution small base

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The Internet & Broadband

Overall penetration of PC and/or Laptop Ownership continues to grow – Just one in five now have neither

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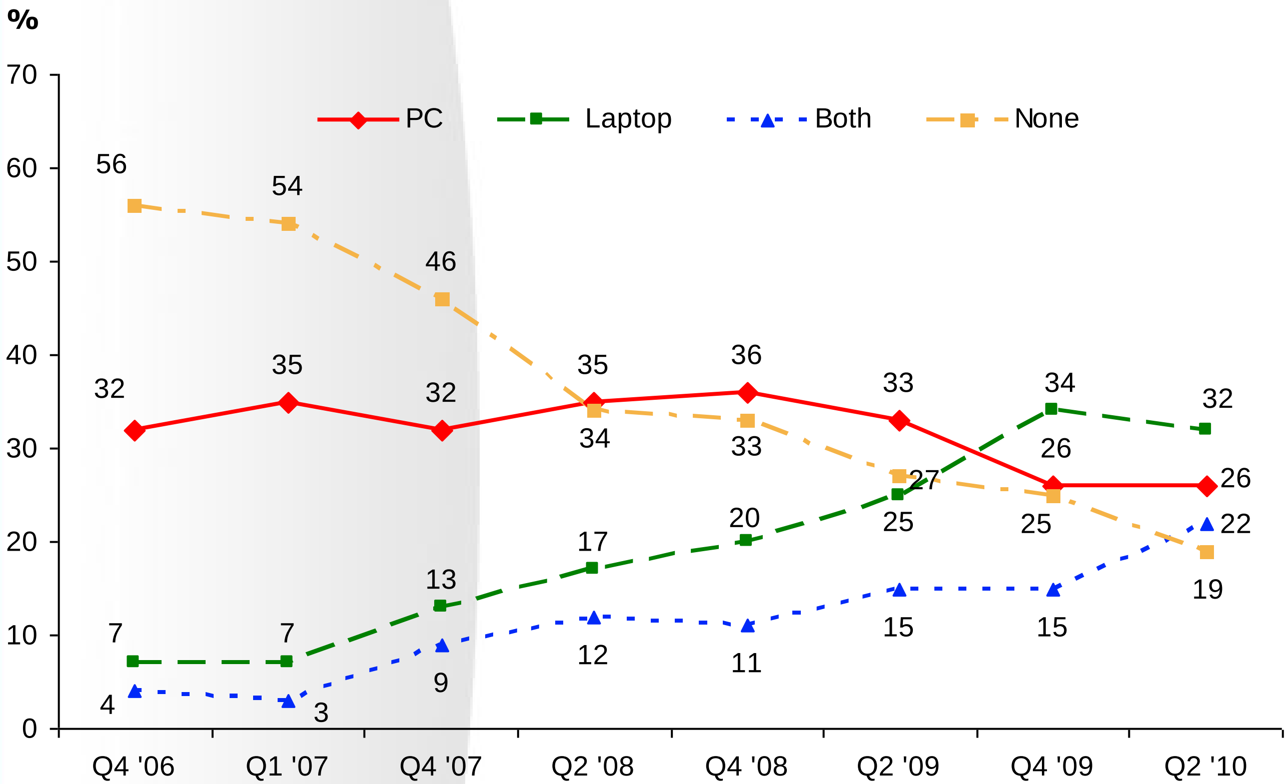
Q. Do you have a Personal Computer (PC) in your house (including laptops that you usually have at home)?



Laptop Only – 32%
Higher Among

18-24	47%
Students	47%
Renters	44%
Subscribe to Internet	39%
C2s	37%

None – 19%
Higher Among

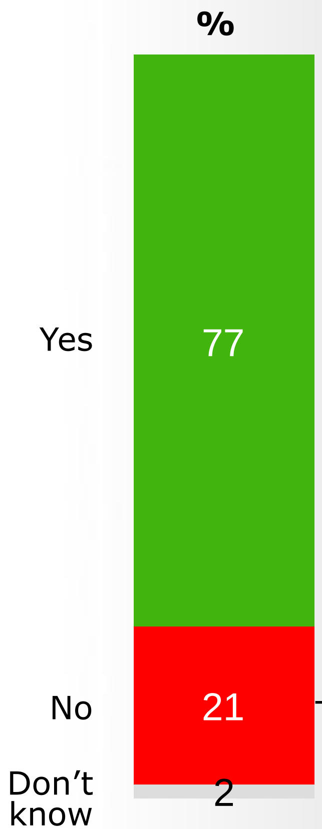
Don't subscribe to internet	69%
65-74	41%
DEs	34%
No fixed line	27%
Renters	25%

Base: All Respondents (n=1,007)

Over three quarters of adults use the internet for personal use; there is near universal use of the internet from home

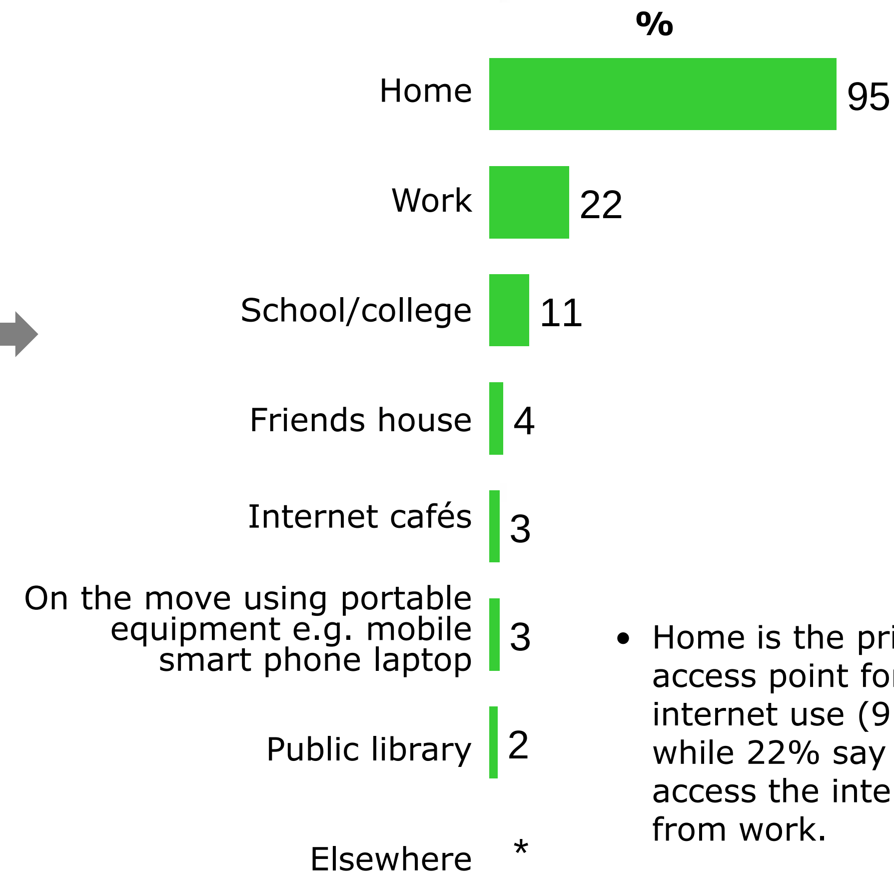
Q. Do you access the Internet for personal use?
Q. From which of the following locations do you use the Internet?

NEW



No - Higher Among

65-74	57%
Fs	41%
Home maker	39%
Retired/ unemployed	38%
DEs	36%
50-64	35%
Connaught/Ulster	28%
No fixed line	28%



- Home is the primary access point for internet use (95%), while 22% say they access the internet from work.

Base: All Respondents (n=1,007)

Base: All Who Use Internet for Personal Use (n=783)

Three quarters of all adults subscribe to an internet connection for personal use, mainly a broadband connection

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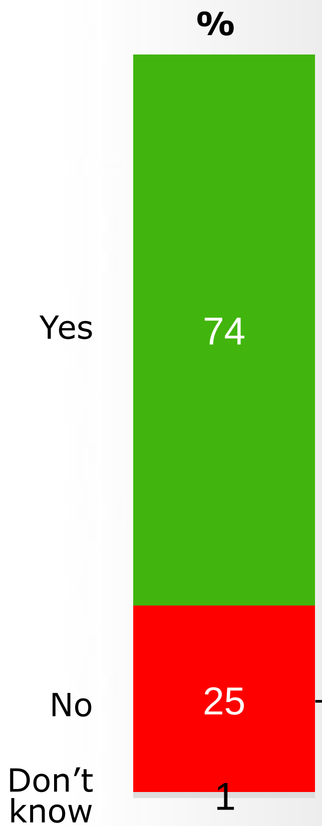
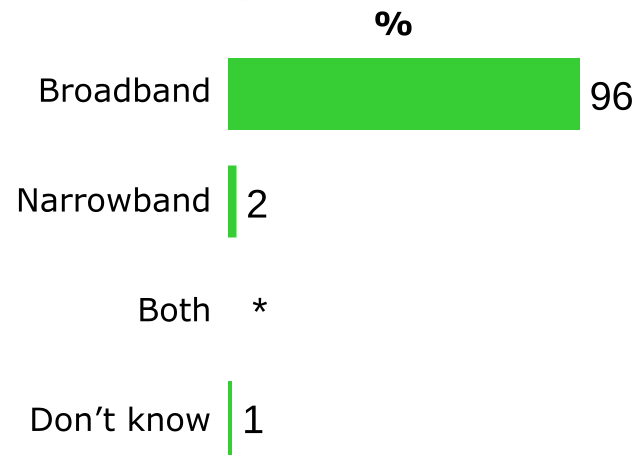
Q. Do you currently subscribe to an Internet connection for personal use?
Q. What type of internet connection do you subscribe to for your personal use?

NEW



No - Higher Among	
65-74	48%
Fs	46%
DEs	42%
Work in home	37%
No fixed line	36%
Connaught/Ulster	34%
50-64	33%
Rent	30%



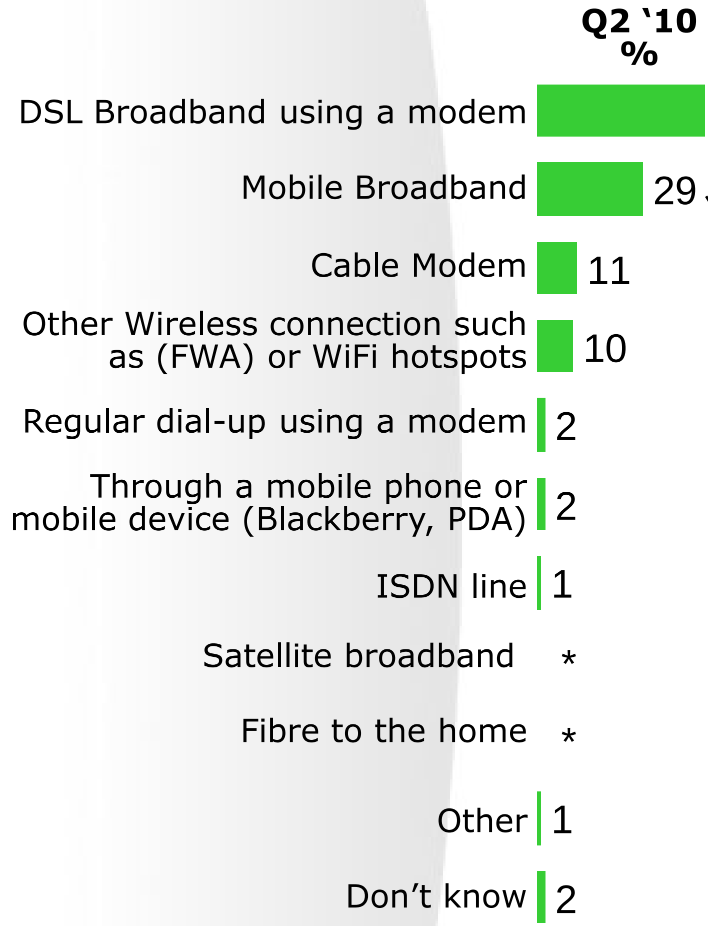
- Nearly all of those who subscribe to the internet for personal use, say they have a broadband connection (96%)

Base: All Respondents (n=1,007)

Base: All Subscribe to Internet for Personal Use (n=761)

DSL primary internet connection type used, 3 in 10 use mobile broadband

Q. How do you connect to the Internet from home? (Multiple answers allowed)



DSL - Higher Among

50-64	66%
Eircom for fixed line	62%
Switched ISP last12 months	53%
Dublin	52%
Own home	52%

MBB - Higher Among

No fixed line	60%
Fs	49%*
Renters	42%
25-34	41%
Connaught/Ulster	41%
Meteor (voice) customers	41%
18-24	40%
C2DE	35%

- DSL is the main type of internet connection used by those who personally subscribe to the internet. Nearly 3 in 10 use a mobile internet connection, and one in ten each use cable or other wireless connection.

Base: All Subscribe to Internet Connection for Personal Use (n=761)

*Caution small base

Main reason for having more than one internet connection is multiple PC/laptop ownership

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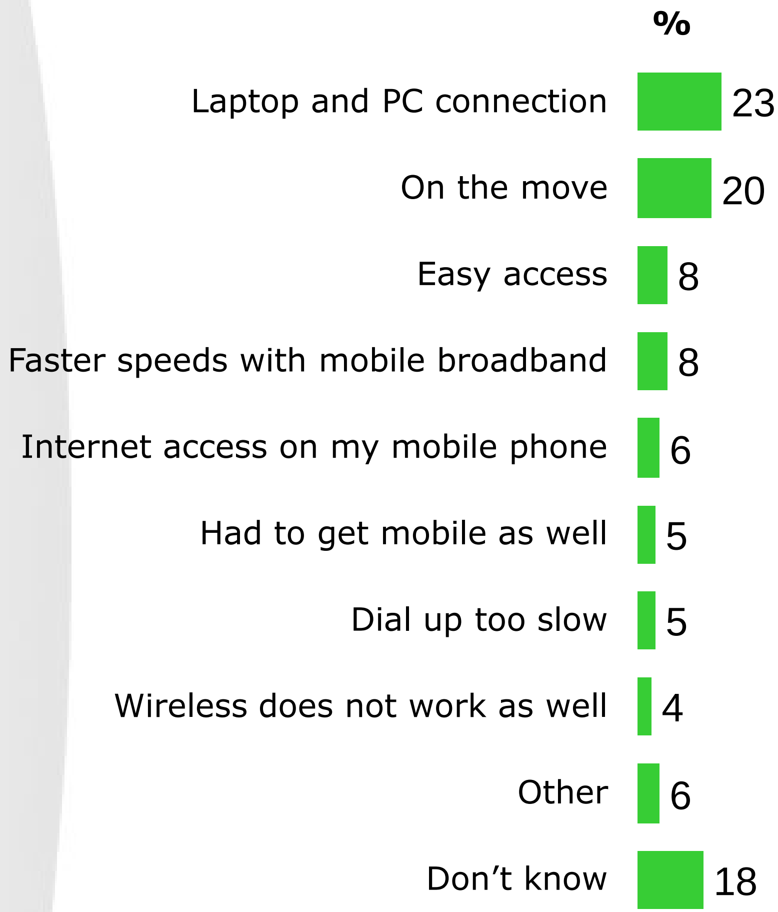
Q. Why do you have more than one connection?

NEW



*Caution small base

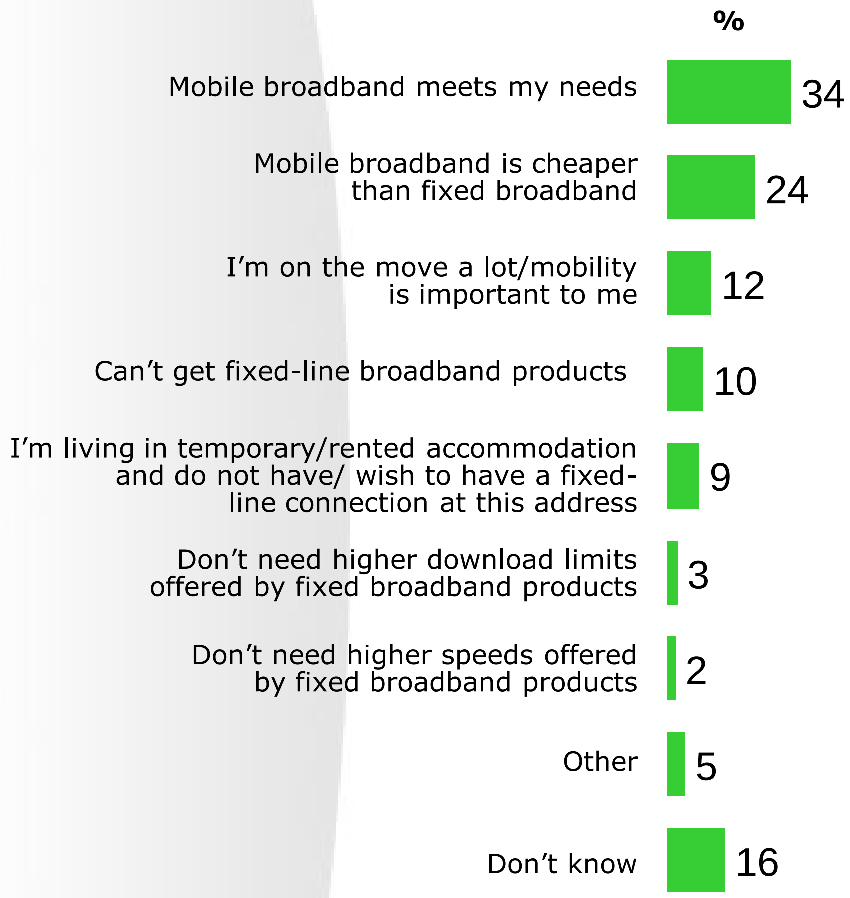
Base: All With More Than One Internet Connection (n=29*)

Mobile broadband 'meeting needs' is the main reason for only having a mobile broadband connection

Commission for Communications Regulation

Q. Why did you choose to have mobile broadband only?

NEW



Higher Among	
Munster	46%
No fixed line	41%
Females	40%
Renters	38%

Base: All With Mobile Broadband Only (n=190)

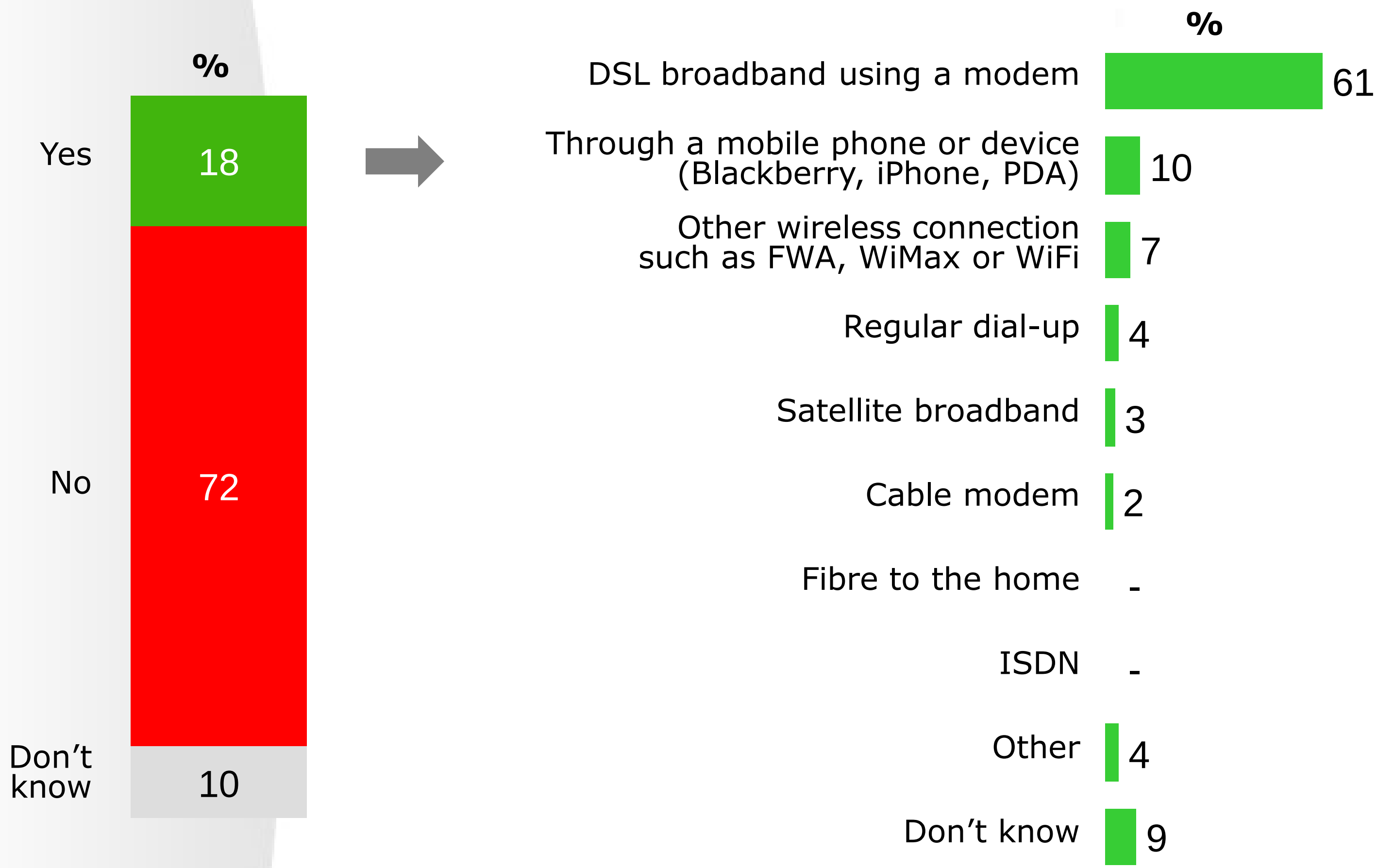
*Caution small base

Nearly three quarters using mobile broadband only do not use it as a replacement for a previous connection

Commission for Communications Regulation

Q. Did you subscribe to a mobile broadband product as a replacement for a different type of internet connection?
Q. What type of internet connection is your current mobile broadband connection a replacement for?

NEW



Base: All With Mobile Broadband Only (n=190)

Base: All With Mobile Broadband only, and had previous connection (n=35*)

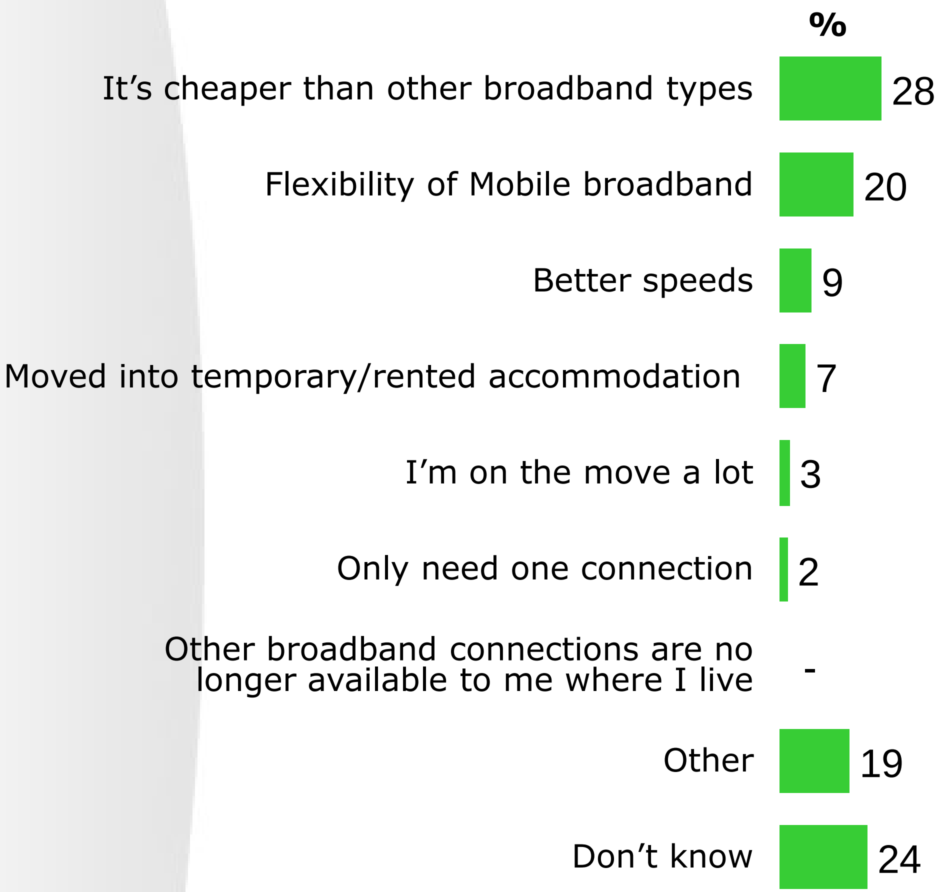
*Caution small base

Reasons for switching to mobile broadband from previous internet connection

Commission for Communications Regulation

Q. Why did you switch to mobile broadband as a replacement for your previous internet connection?

NEW



Base: All With Mobile Broadband only, and had previous connection (n=35*)

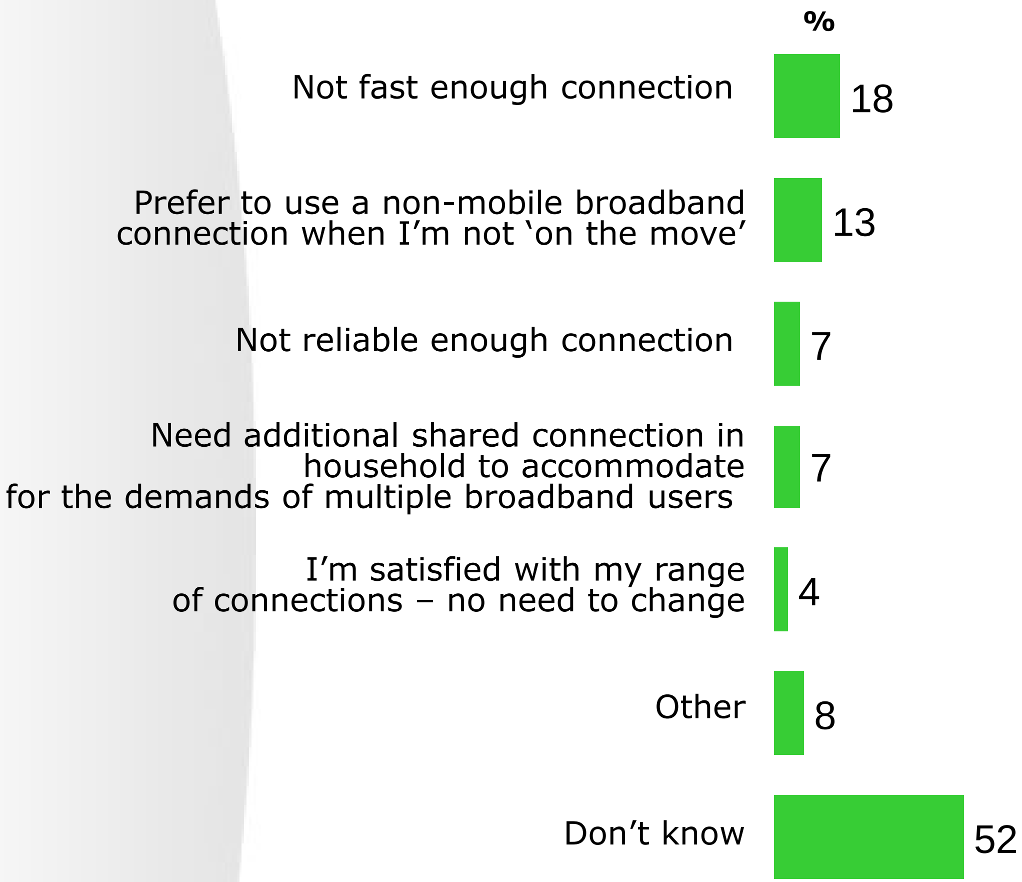
*Caution small base

Reasons for having mobile broadband and another connection

Commission for Communications Regulation

Q. Why don't you rely SOLELY on mobile broadband?

NEW



Base: All Using Mobile Broadband and Another Type of Internet Connection (n=20*)

*Caution small base

Previous instances of subscribing to mobile broadband, and reasons for no longer subscribing

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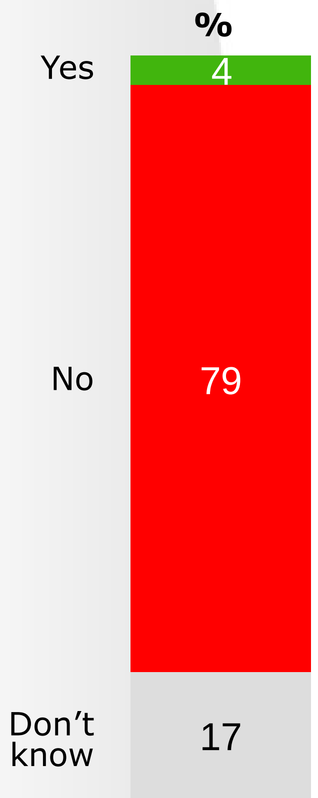
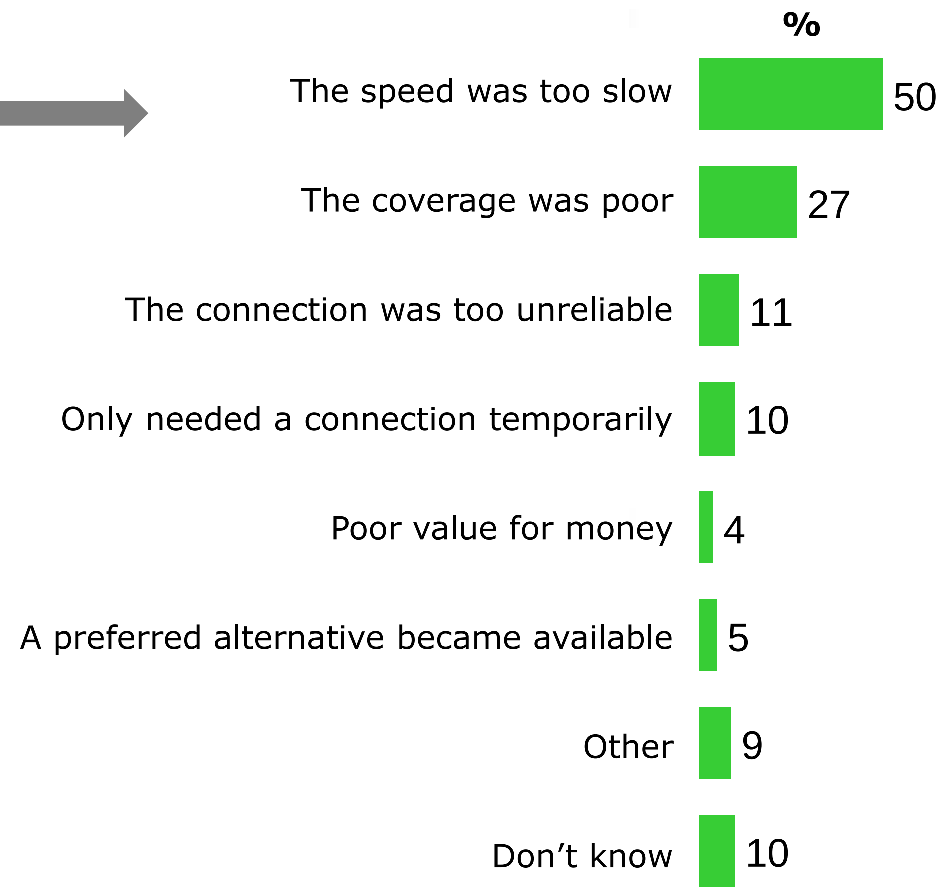
NEW

Q. Have you, at some time in the past, subscribed to a mobile broadband connection?
Q. Why do you no longer subscribe to a mobile broadband service?





Base: All Not Using Mobile Broadband (n=551)

Base: All Previously Used Mobile Broadband (n=20*)

*Caution small base

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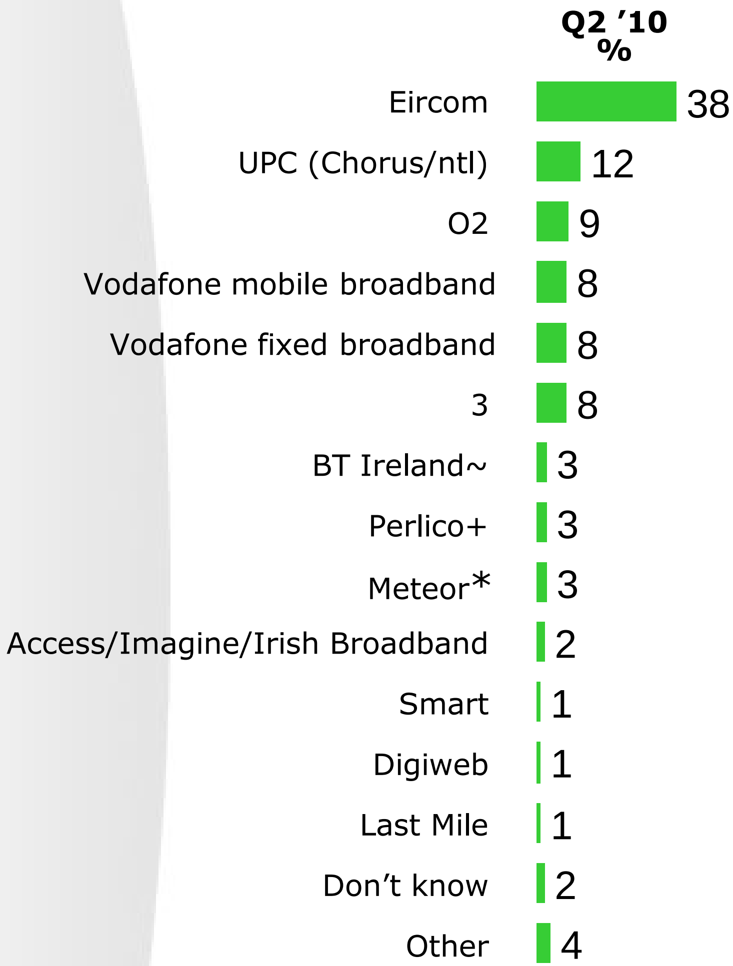
Home internet access provider

Q. Who is your home Internet Service Provider (ISP)?



- Nearly four in ten of those who subscribe to the internet for personal use, use Eircom. At a total level 22% use Vodafone (8% mobile, 8% fixed Vodafone, 3% BT and 3% Perlico), and a further 12% use UPC.

Response <1% not shown

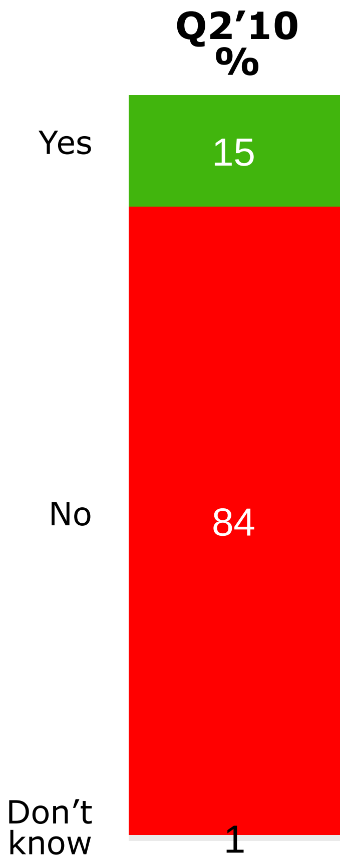
Base: All Subscribe to Internet Connection For Personal Use (n=761)

* Part of Eircom Group Plc
\+ Part of the Vodafone Group
~as of 1st September 2009 BT's residential customer base were transferred to Vodafone

Commission for Communications Regulation

Switching ISPs

Q. Have you switched Internet supplier in the past twelve months?



Q2 ‘10 % switched last 12 months

Fixed	40% (all switchers)
Mobile	25% (all switchers)
TV Provider	7% (all users)

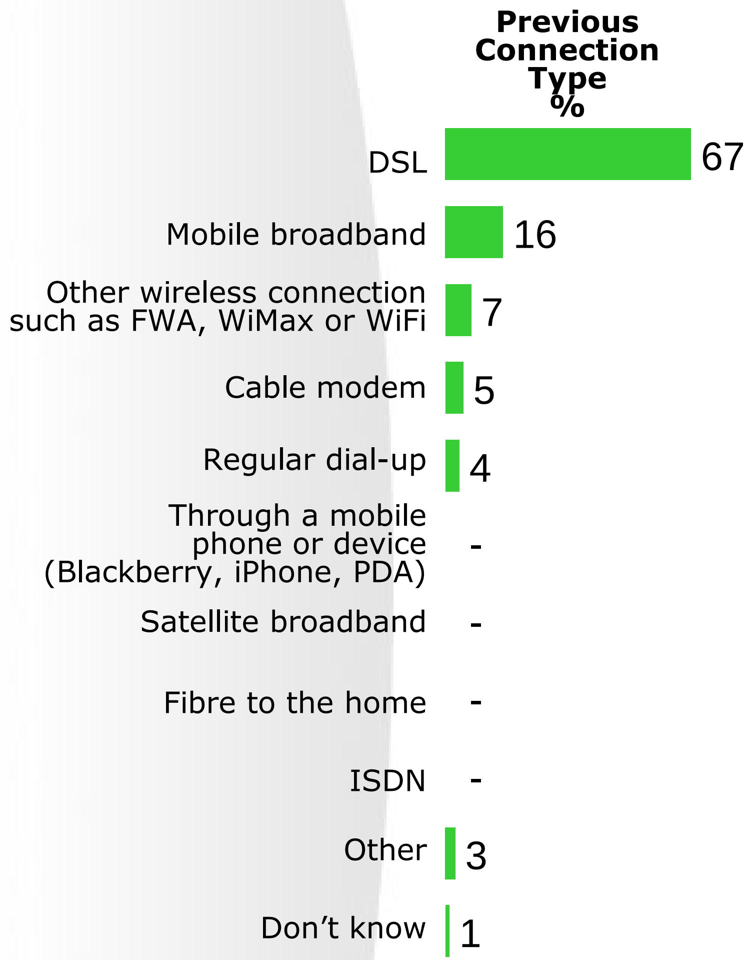
- The majority of those who subscribe to an internet connection for personal use have not switched supplier in the last 12 months.
- Those who did (15%) are more likely to be C2s (22%) those who have switched their fixed line (30%), and those who have an internet provider other than Eircom (27%)

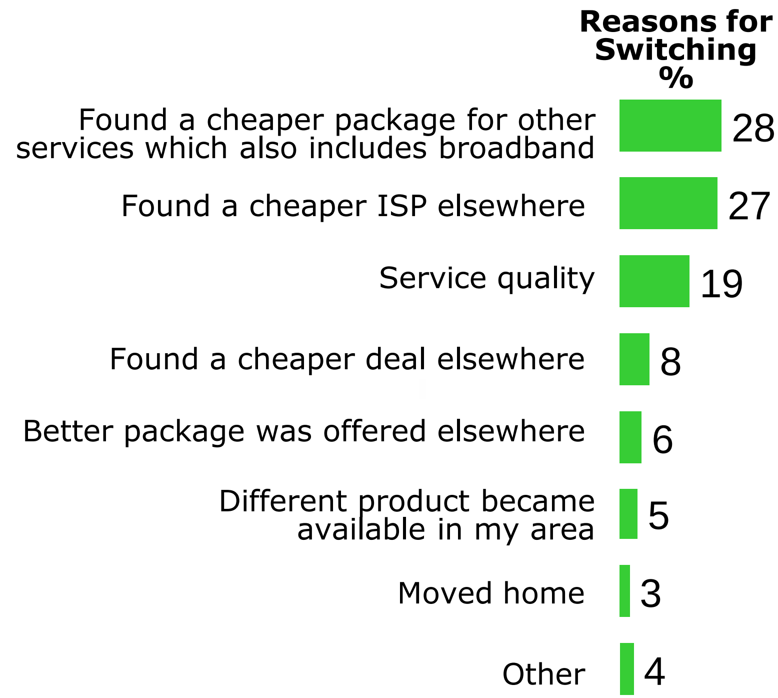
Base: All Subscribe to Internet Connection for Personal Use (n=761)

DSL was the main connection type used before switching; main reason for switching was cost savings

Q. Which type of Internet connection was your previous internet product (prior to switching)?
Q. Why did you switch internet service provider?

NEW





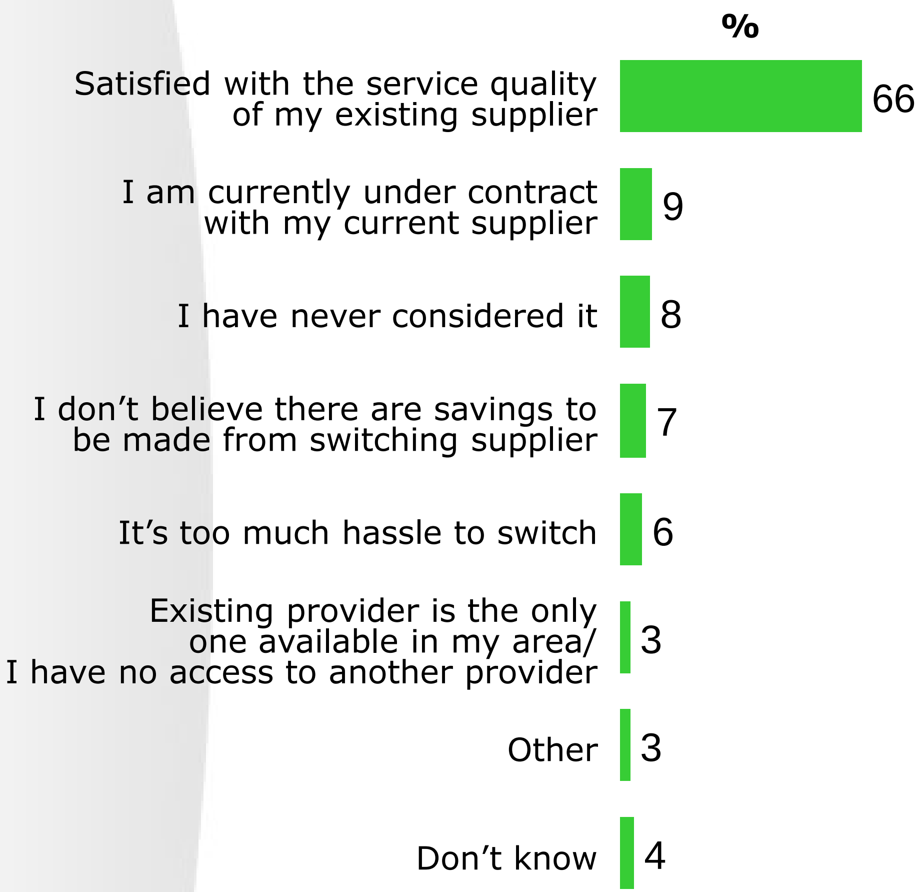
Base: All Who Switched ISP in Last 12 Months (n=115)

Commission for Communications Regulation

Satisfaction with current ISP is the main reason for not switching

Q. What are your main reasons for not switching internet provider in the past 12 months?

NEW



- Two thirds of those who have not switched internet supplier have not done so because they are satisfied with their current supplier.
- Those aged 50-64 (73%), and those living in Dublin (73%) are most likely to give this reason.

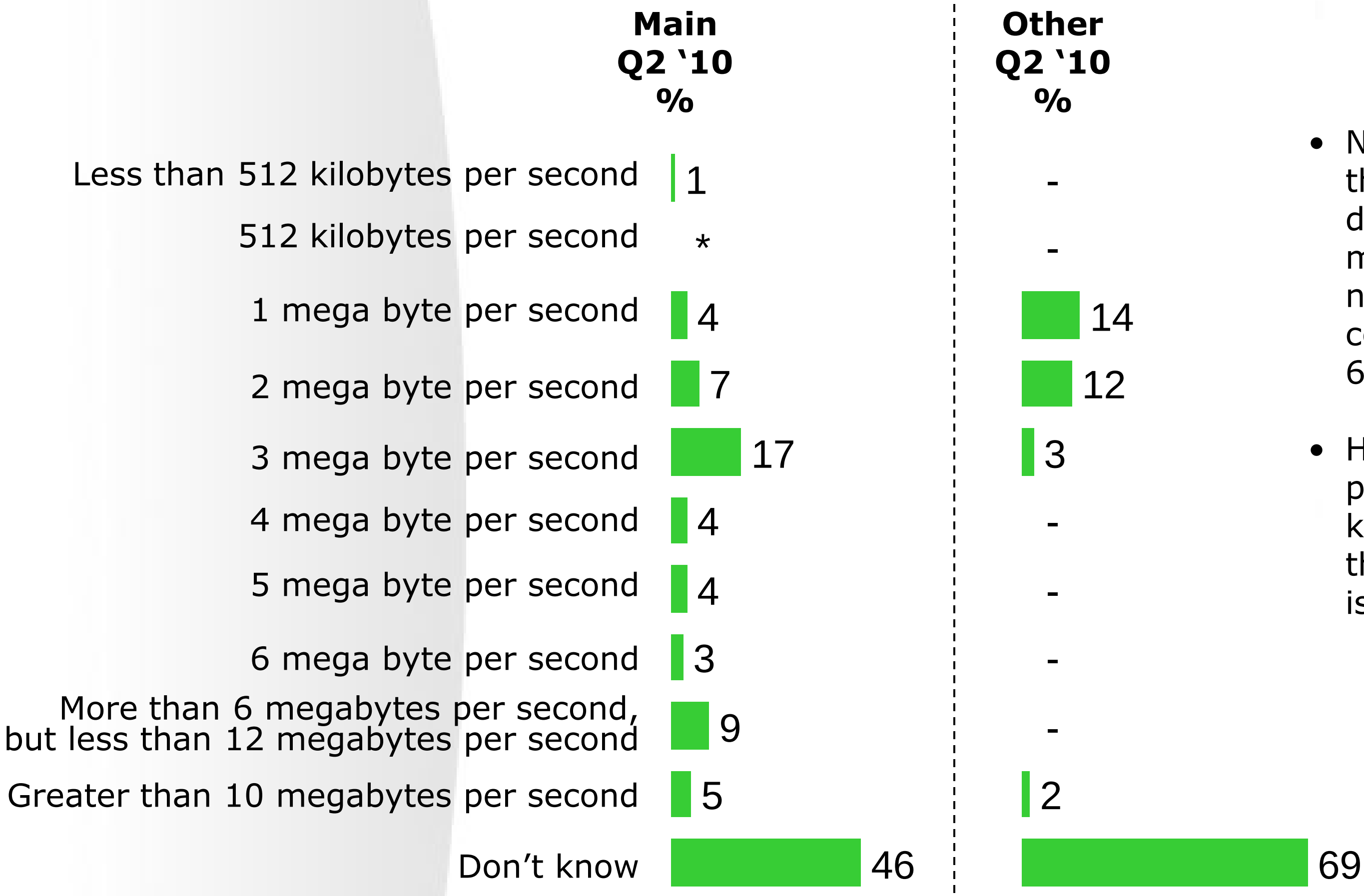
Base: All Who did not switch ISP in past 12 months (n=646)

Commission for Communications Regulation

High lack of awareness of download speeds

NEW

Q. What is the contracted download speed of your main internet subscription? That is, what speed package are you paying for?



- Nearly 1 in 5 say that their contracted download speed is 3 mega bytes per second; nearly 1 in 10 say their contracted speed is over 6 mega bytes per second.
- However a very high proportion (46%) did not know what the speeds of their internet subscription is.

Base: All Subscribe To Internet Connection For Personal Use (n=761)

Base: All with more than one internet connection for personal use (n29*)

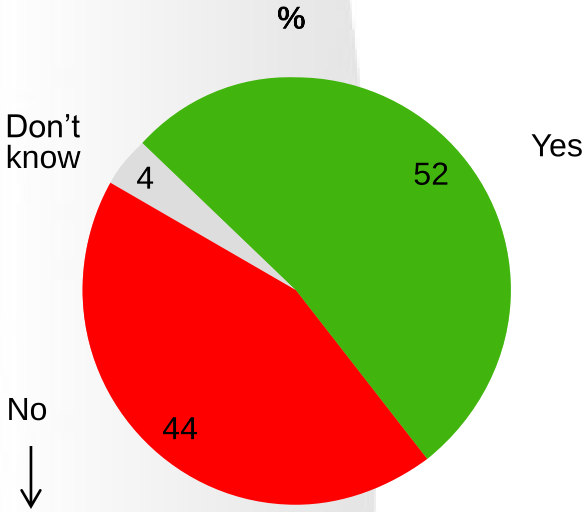
*Caution small base

Over half have contacted their ISP customer service

Commission for Communications Regulation

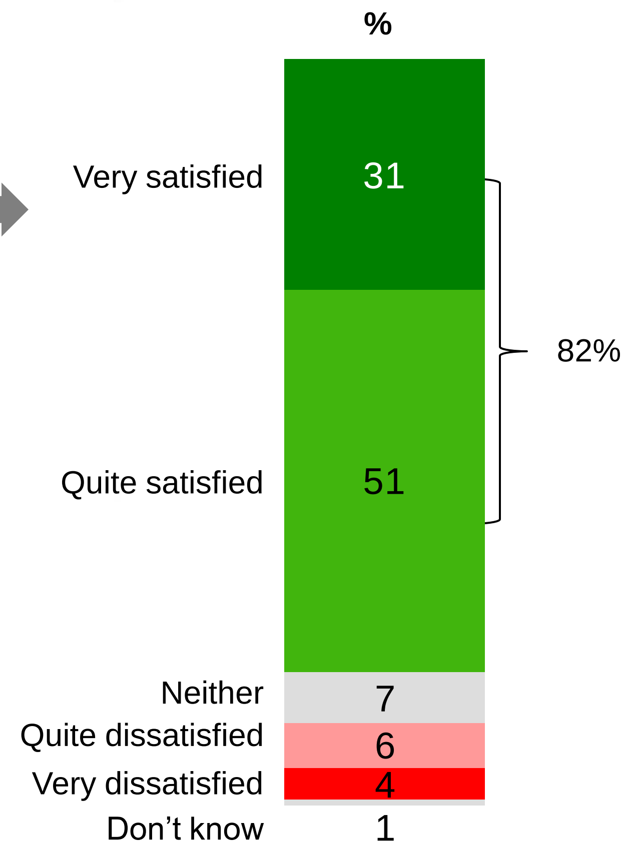
NEW

Q. Have you ever contacted your internet service provider's customer service?
Q. How satisfied are you with the standard of customer service provided by your Internet Service Provider?



Higher Among
ABs 60%
Switched ISP 12 months 60%

Higher Among
Fs 58%*
Work in home 51%



Base: All Subscribe to Internet Connection for Personal Use (n=761)

Base: All Who Contacted Customer Services (n=400)

Minimum contract period: fixed line

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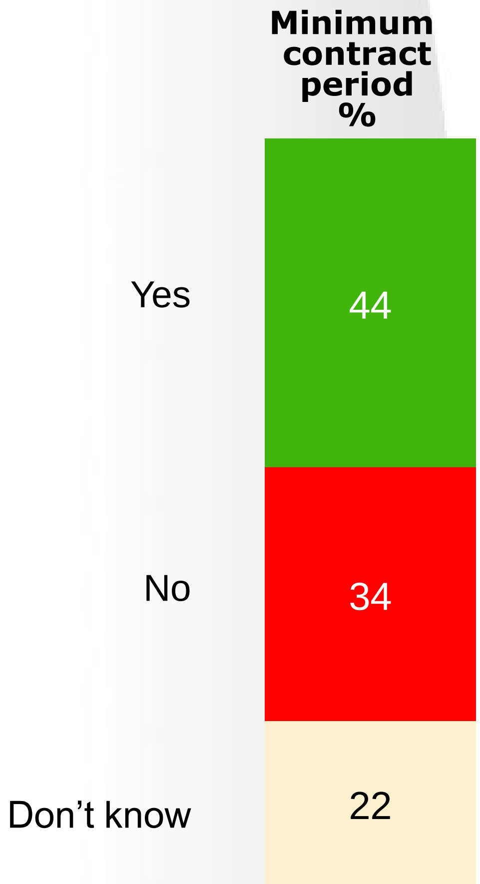
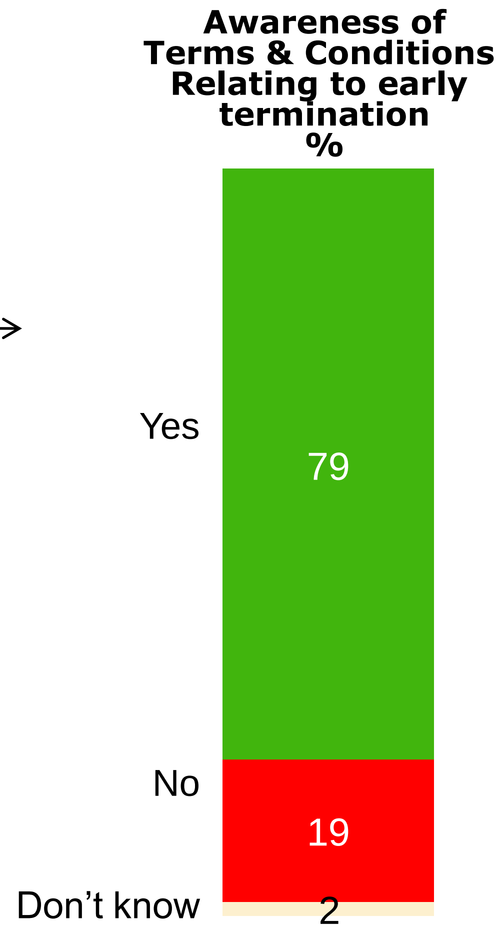
NEW

Q. Does your contract with your Internet Service Provider have a minimum contract period?
Q. Are you aware of the terms and conditions relating to early termination of your contract with your Internet Service Provider?



Base: All Subscribe to Internet Connection for Personal Use (n=761)



Base: All Aware of Minimum Contract Period (n=338)

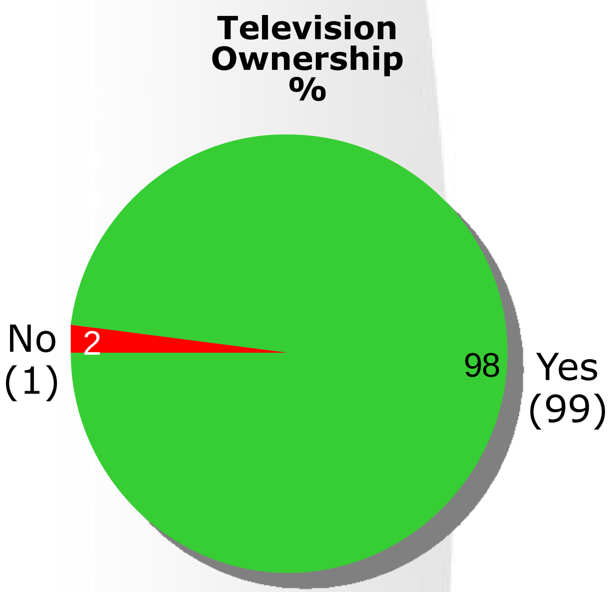
- Over 4 in 10 say there is a minimum contract period with their current ISP, of those 8 in 10 are aware of conditions relating to early termination of the contract.
- Those who say, there is no minimum contract period are more likely to be ABs (44%) and those living in Connaught/Ulster (44%).
- There is a relatively high proportion (22%) who don't know whether or not there is a minimum contract period with their ISP.

Broadcasting

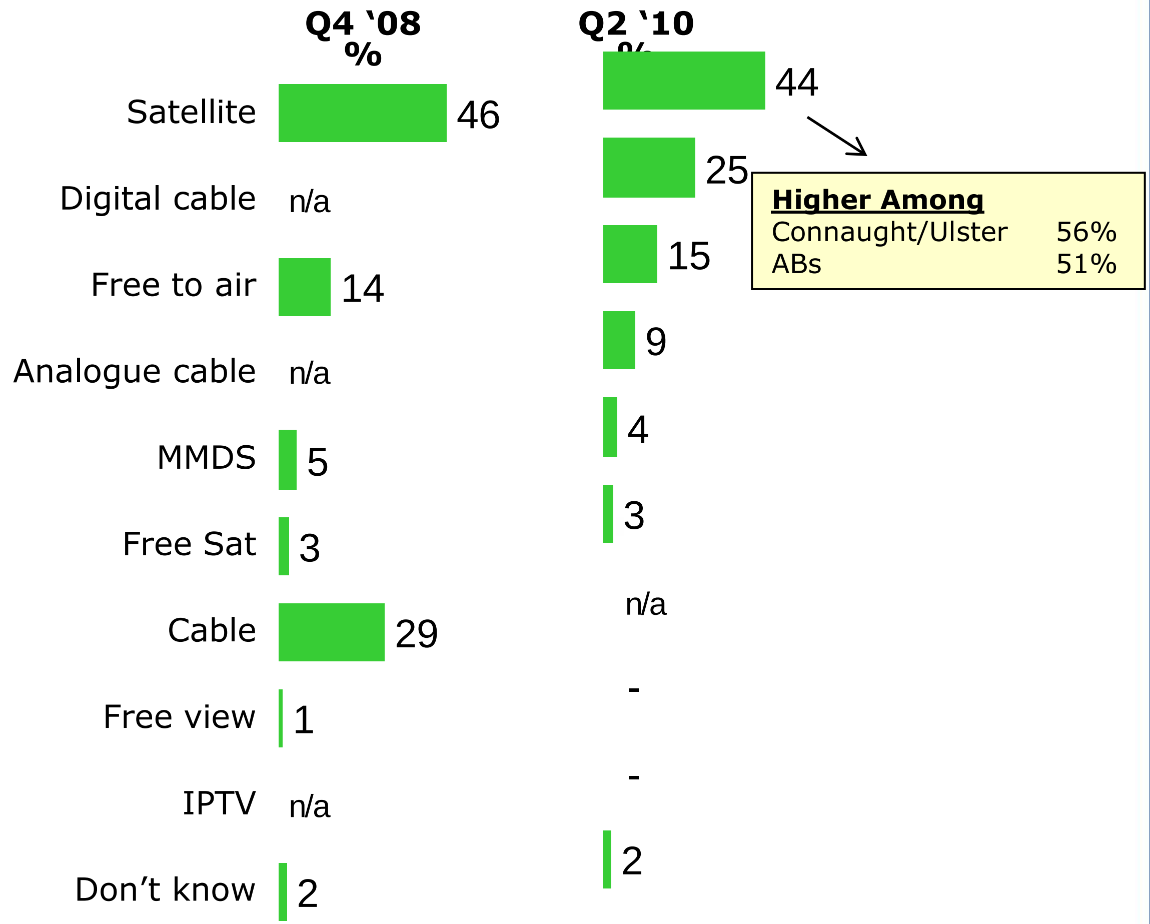
There is near universal TV ownership in Ireland, almost 70% subscribe to a cable or satellite service

Commission for Communications Regulation

Q.	Do you have access to a Television in your home?
Q.	How do you access your TV programmes?



( ) Q4 '08 data



Base: All Respondents (n=1,007)

Base: All with TV in Home (n=980)

Commission for Communications Regulation

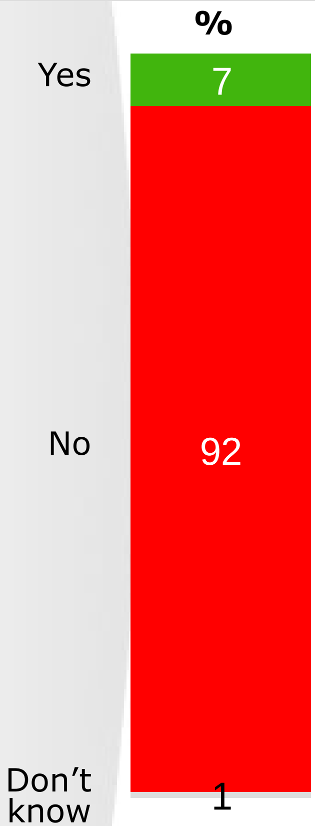
Low number of switching TV service provider in the past 12 months

Q. Have you switched your TV service provider in the past twelve months?
Q. What type of TV access did you have before you switched?

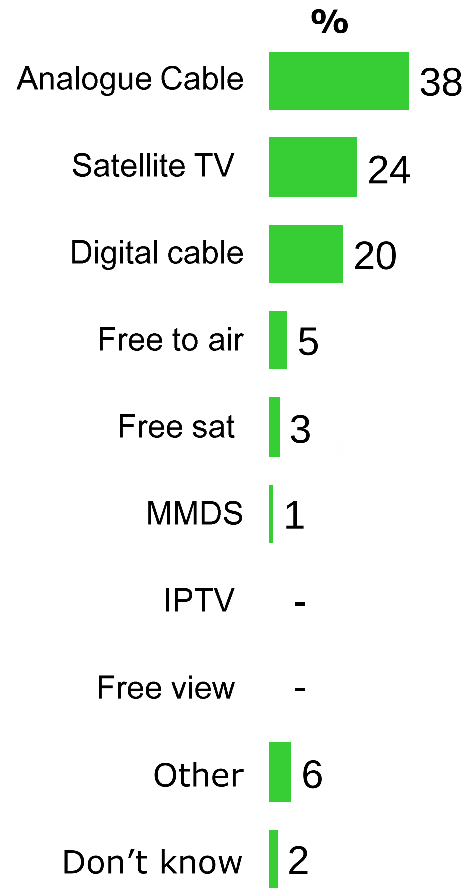
NEW

Q2 '10 % switched last 12 months

Fixed	40% (all switchers)
Mobile	25% (all switchers)
Internet Service Provider	15% (all users)



Base: All with TV in Home (n=980)



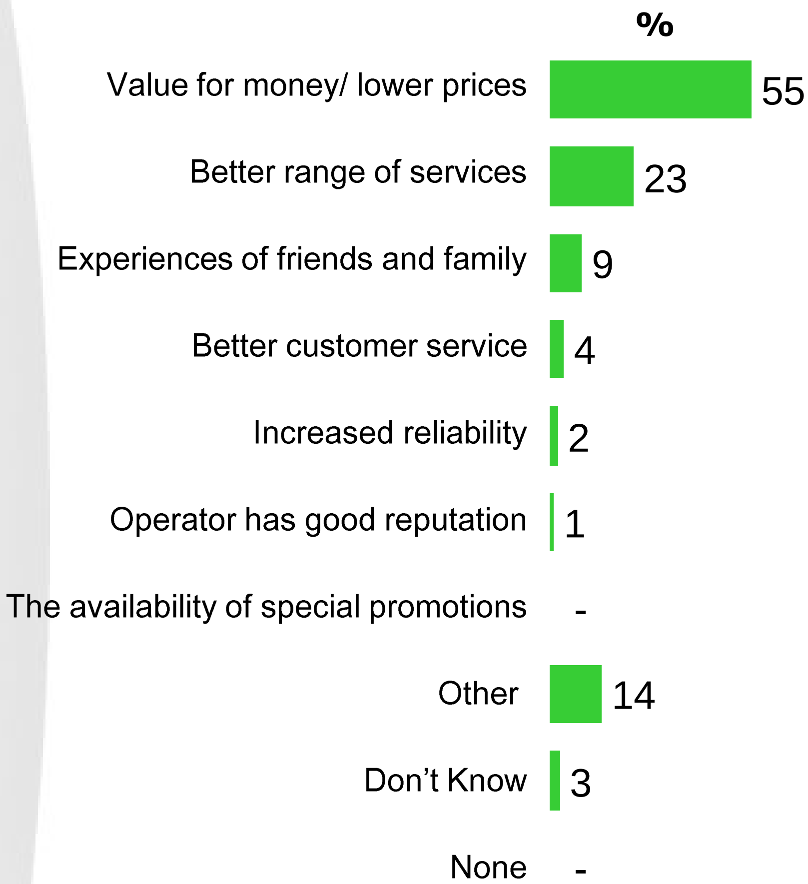
Base: All Switched TV Service Provider in Last 12 Months (n=71)

MillwardBrown Lansdowne

Value for money main reason for switching TV services in last 12 months

Q. Why did you switch your TV service provider?

NEW



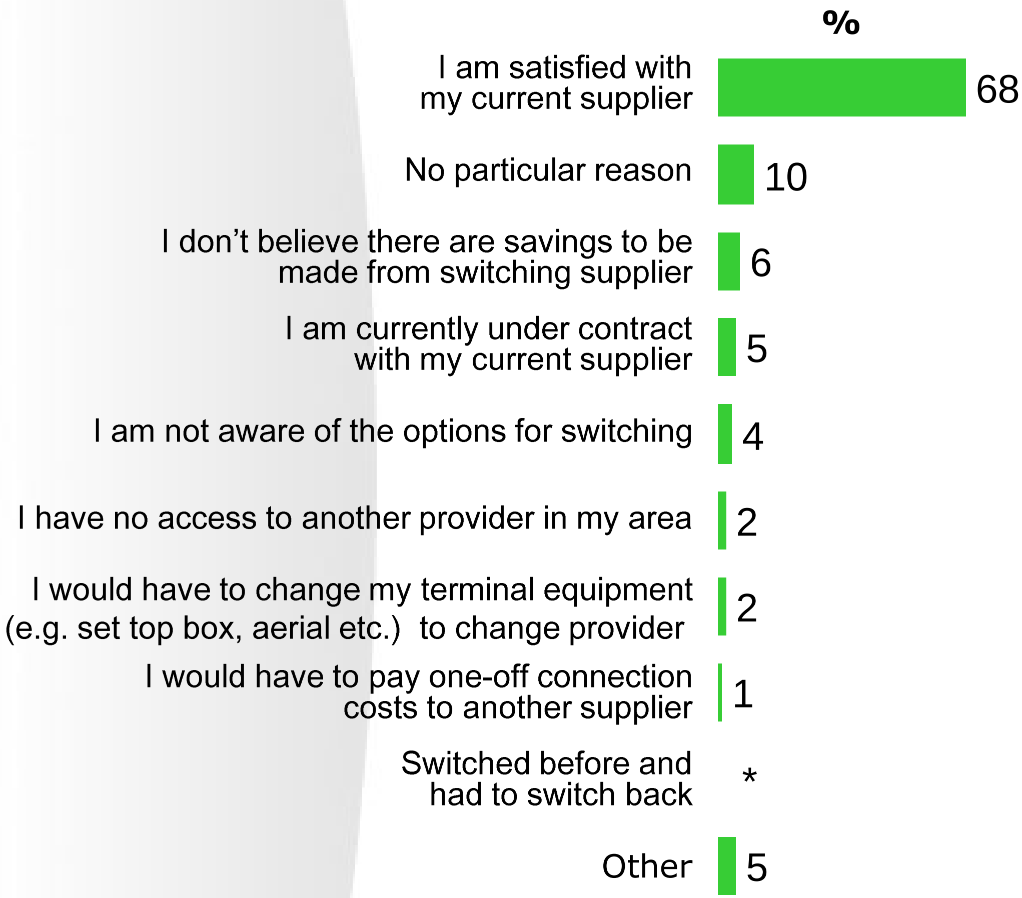
Base: All Switched TV Supplier in Last 12 Months (n=71)

Commission for Communications Regulation

7 in 10 say satisfaction with current supplier is the reason they have not switched TV service provider in the past 12 months

Q. What are your main reasons for not switching TV service provider ?

NEW



Higher Among

Work in home	73%
Retired/unemployed	73%
No home internet	73%
C2s	72%
Female	71%
Munster	71%

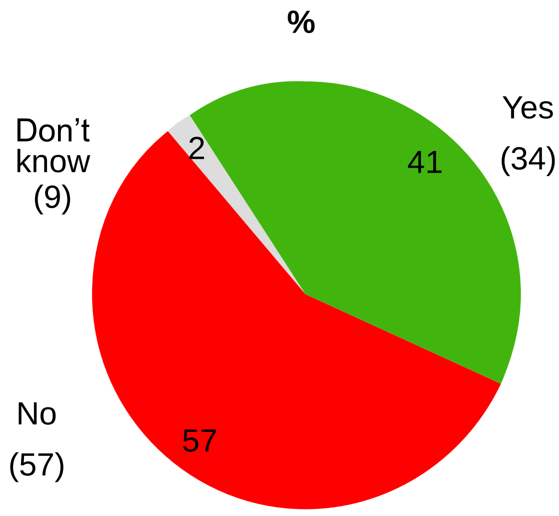
Base: All Who Have Not Switched TV Supplier In Past 12 Months (n=909)

Just over one third are aware of analogue TV broadcasting switch off

Commission for Communications Regulation

Q. Are you aware of the completes switch off of analogue TV broadcasting* by 2012 in Ireland?

Higher Among	
15-24	74%
No internet use	72%
No home internet	71%
Work in home	65%
Renters	65%
C2DEs	64%
Females	64%
Munster	63%



( ) Q4 '08 data#

- 4 in 10 are aware of the analogue switch off.
- Awareness is more pronounced among males (48%), the farming community(49%), and those with Internet connection at home (46%).

Base: All with TV in Home (n=980)

#previously asked of all respondents

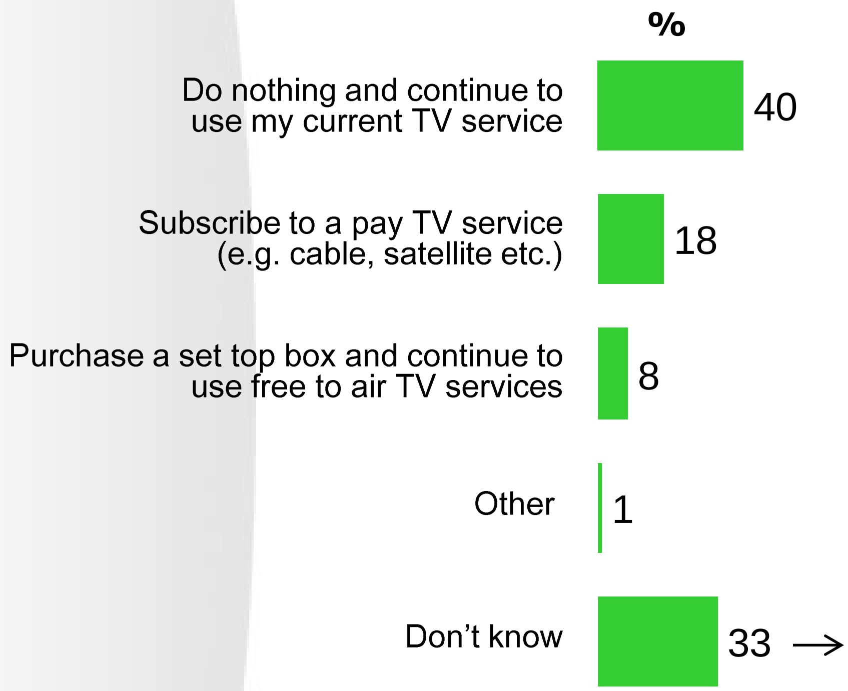
*Note: the switch off of analogue TV broadcasting applies solely to analogue broadcasting using Spectrum and does not include analogue cable transmission

A third of those with a TV don't know what they'll do to continue to receive TV services after analogue switch off

Commission for Communications Regulation

Q. In terms of this switch over what do you think you will do to continue to receive TV services?

NEW



Higher Among	
Fs	47%
Students	41%
No internet use	41%
No home internet	41%
50-64	40%

Base: All with TV in Home (n=980)

Conclusions

Conclusions - I

FIXED

- There has been an increase in the percentage of fixed line households, with 7 in 10 adults saying they have a fixed line in their home. While Eircom remains the main provider used, its share of the market continues to fall.
- For those who don't have a fixed line, having a mobile which they use instead is the main reason for not having one.
- There is a higher proportion of fixed line users who have ever switched fixed line provider than the previous wave (46% v 34%) and of these 4 in 10 have switched in the last year. The process of switching is considered easy by the vast majority of those who have switched.
- Of those who have ever switched, nearly a third had switched back to their previous provider mainly as a result of not making the cost savings they expected when switching, or because they were contacted with a better offer from their previous provider.
- Nearly 6 in 10 fixed line subscribers had contacted their operator's customer service, and satisfaction with the standard of service provided was high.
- A third of fixed line users say that there is a minimum contract length associated with their fixed line home phone provider, however one in five is unsure. Of those who say there is a minimum contract length, 7 in 10 are aware of terms and conditions relating to the early termination of the contract.

MOBILE

- Mobile phone ownership stands at 96% and 7 in 10 of those who own a mobile phone are using a pre-paid option. The availability of more post pay packages on the market e.g. sim only contracts, smart phone contracts, are likely to have resulted in the increased number of post-pay subscriptions in the last 2 waves of research.
- Vodafone maintain the highest market share at 44%. A third of mobile phone users use O2, while one in five use Meteor.

Conclusions - II

- A third of mobile phone users have ever switched mobile provider, with a quarter of these having done so in the last 12 months. Of those who have ever switched 15% have switched back to their original provider which is lower than in the fixed line market where 3 in 10 switched back.
- Nearly 6 in 10 mobile subscribers contacted their operator's customer service; satisfaction with the standard of service provided was high.
- Two thirds of post-pay mobile subscribers say their contract with their mobile service provider has a minimum contract period. There is very high awareness of terms and conditions relating to the early termination of this contract period.
- Of all mobile users, 7 in 10 have used their mobile phone when roaming. Nearly half of those who roam are satisfied with the costs of calls and SMS while roaming.
- Only 1 in 5 mobile phone users take roaming rates into account when choosing a mobile phone package.
- Half of mobile phone users claim to be aware that SMS charges in the EU having been capped. Two thirds of roamers recall receiving a text message from their provider with roaming costs when roaming in the EU.
- There are very low levels of roamers using the internet on their phones – but of those who did nearly 4 in 10 say they are satisfied with what they were charged for mobile internet services.
- A similar number however have experienced bill shock after using their phones to access the internet while roaming. Of these only 3 in 10 were aware that mobile operators are required to offer the option of a data roaming cap to their customers.

Internet

- There is a decreasing percentage of adults in Ireland who do not have a PC/laptop or both in their home as only one in five now claim not to have either.

Conclusions - III

- Nearly 8 in 10 adults claim to use the internet from any location, with the bulk of these accessing the internet from home.
- Three quarters of adults currently subscribe to an internet connection for personal use, with nearly all claiming they have a broadband connection. DSL remains the most used internet access technology, however close to 3 in 10 internet users claim to use mobile broadband.
- Nearly 4 in 10 respondents use Eircom as their ISP, with 22% saying they use Vodafone and 12% UPC.
- Of those internet users who use mobile broadband as their sole connection type, the main reasons for only having this type of connection is that it meets the users' needs and is cheaper than fixed broadband.
- Nearly three quarters of customers using mobile broadband-only do not use it as a replacement for a different internet connection type.
- There are lower levels of switching ISP than fixed or mobile providers, as only 15% have switched in the last 12 months. Of those who have switched, two thirds were DSL customers and cheaper prices appear to have driven the move to another provider. For those who didn't switch the main reason for not doing so was satisfaction with their current provider.
- Awareness of download speeds is very low; just under half said they did not know what speed their provider was contracted to provide.
- Half of those who subscribe to an internet connection for personal use have contacted their ISP's customer service, 8 in 10 of those were satisfied with the standard of service received.
- Over 4 in 10 with an internet connection say that their contract with their ISP has a minimum contract period, and nearly 8 in 10 of these are aware of the terms and conditions relating to early termination of their contract with their ISP.

Conclusions - IV

BROADCASTING

- There is near universal TV ownership in Ireland. Of those with a TV in the home 44% access their TV programmes via satellite, a third use cable (25% digital, 9% analogue), and 15% use the free to air service.
- There are low levels of switching TV providers, with those who did saying getting value for money was the main reason for switching. Of those who didn't switch, satisfaction with their current supplier was the key reason for not switching.
- 4 in 10 of those with a TV in the home are aware of the analogue terrestrial TV broadcasting switch off in 2012.