



Commission for
Communications Regulation

Consumers with Disabilities Telecommunications Research

Q2 2010

A Review of Findings
by



MillwardBrown
Lansdowne



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 - Mobile Phone
 - The Internet
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Introduction

- As part of the work of ComReg's Forum on Services for People with Disabilities, ComReg first commissioned a survey among people with disabilities in 2007 using a booster sample of 350 ICT users with disabilities.
- In 2009 it was decided at a meeting of the Forum that ComReg would commission another survey to update the 2007 research.
- The 2007 questionnaire was used as the basis for the 2010 research, and additional questions were added.
- A change in methodology from face-to-face to self-completion was agreed to maximise response rates and to afford privacy in participation. In addition there was also an option of telephone interviews for those with a visual impairment.
- Questionnaires were sent via post to 2,500 members of "People with Disabilities Ireland" (PWDI), representing the nine areas of disability.
- The self completion questionnaires were sent out on Tuesday the 20th of March, and the final date for receiving questionnaires back was Friday the 14th of May. The telephone interviews were conducted in the first two weeks of May.
- 314 interviews were completed.
- Where possible comparisons have been made with the adult population of Ireland from ComReg's residential research conducted in December 2009.



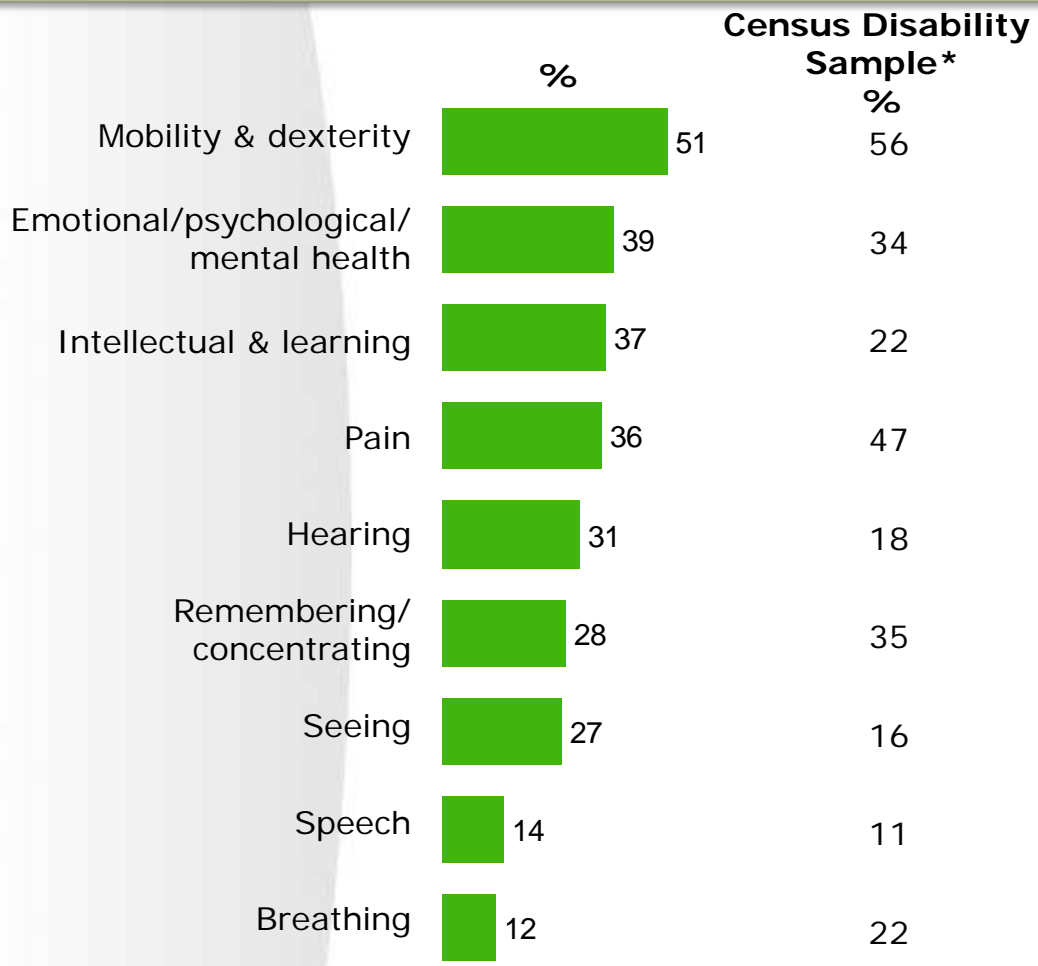
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Details about the respondents

Disabilities experienced

Q. Can you please indicate what level of difficulty you have with any of the following everyday activities? Please only indicate difficulties that have lasted, or are expected to last, six months or more, or that regularly re-occur.



2007 Classification
 Vision impaired*
 Physical disability
 Intellectual disability*
 Psychological/emotional condition*
 Other

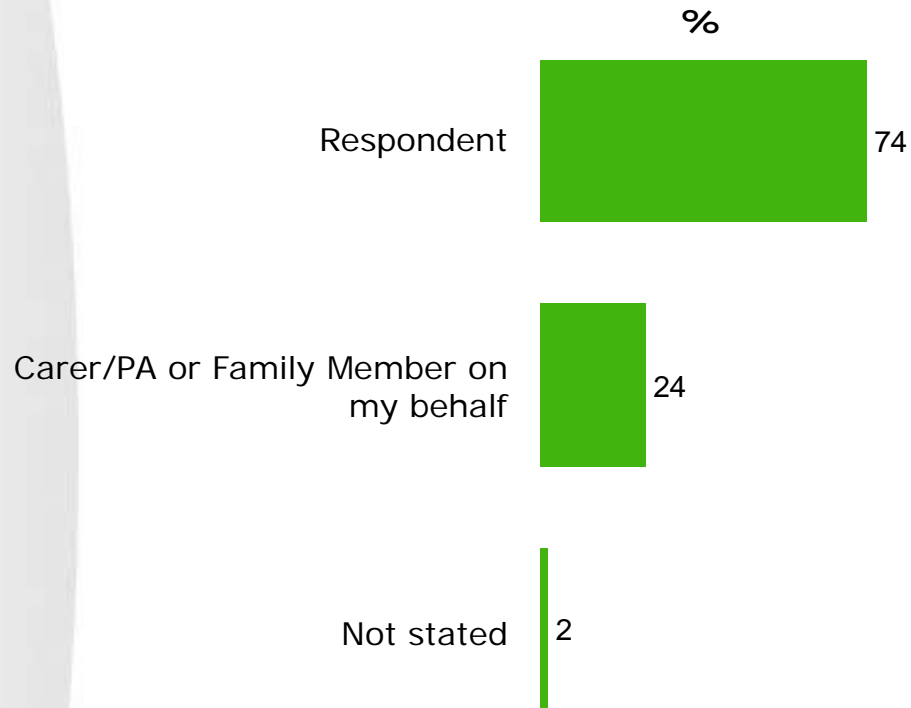
*Comparable with 2010

*Table 1.5 National Disability Survey

Completion of questionnaire



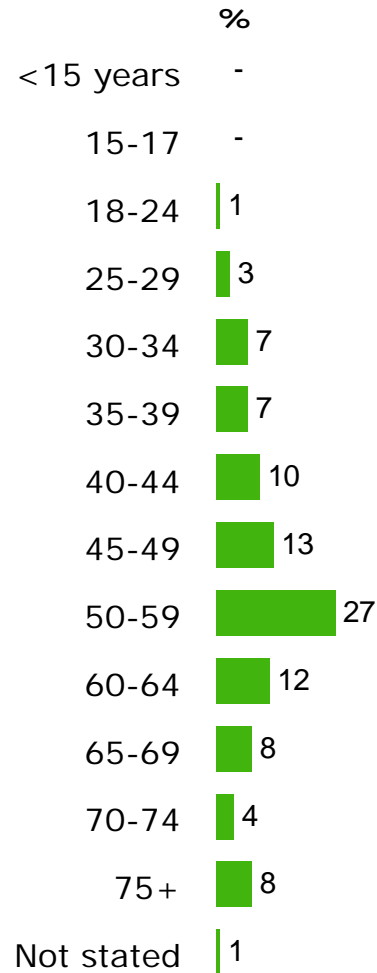
Q. Is this questionnaire completed by you, your carer/PA or family member on behalf of you?



Age of respondent



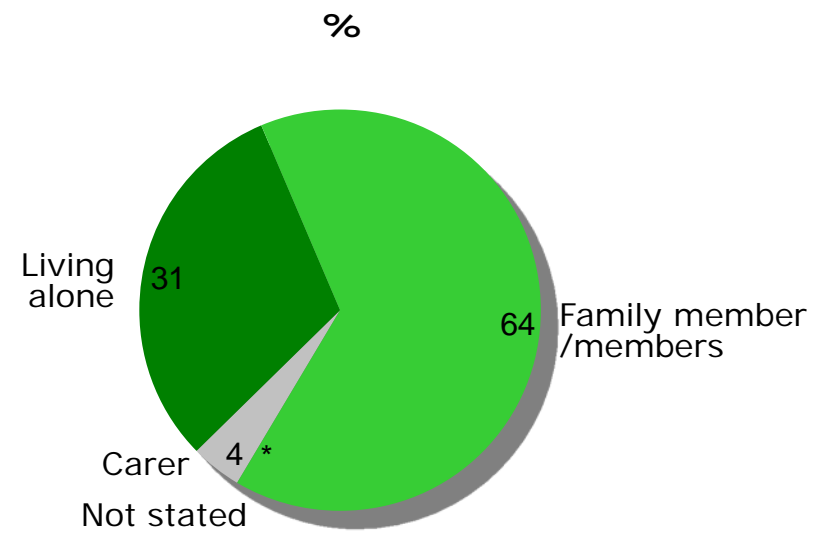
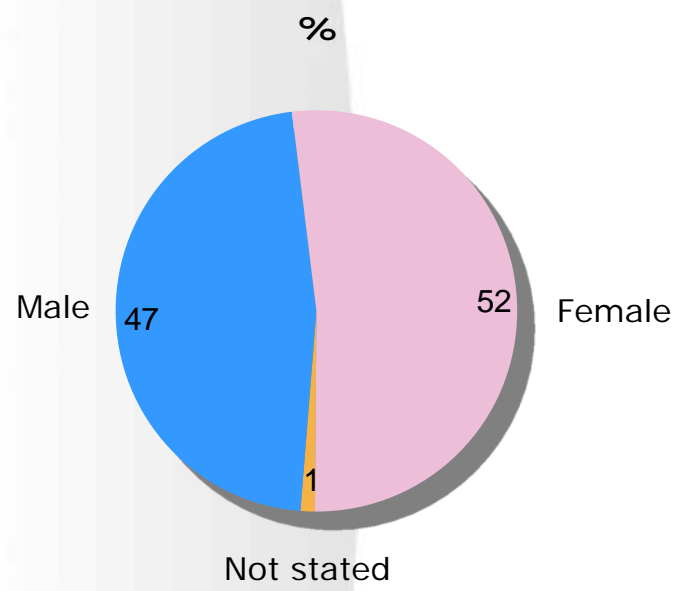
Q. What is your age?





Gender and living situation

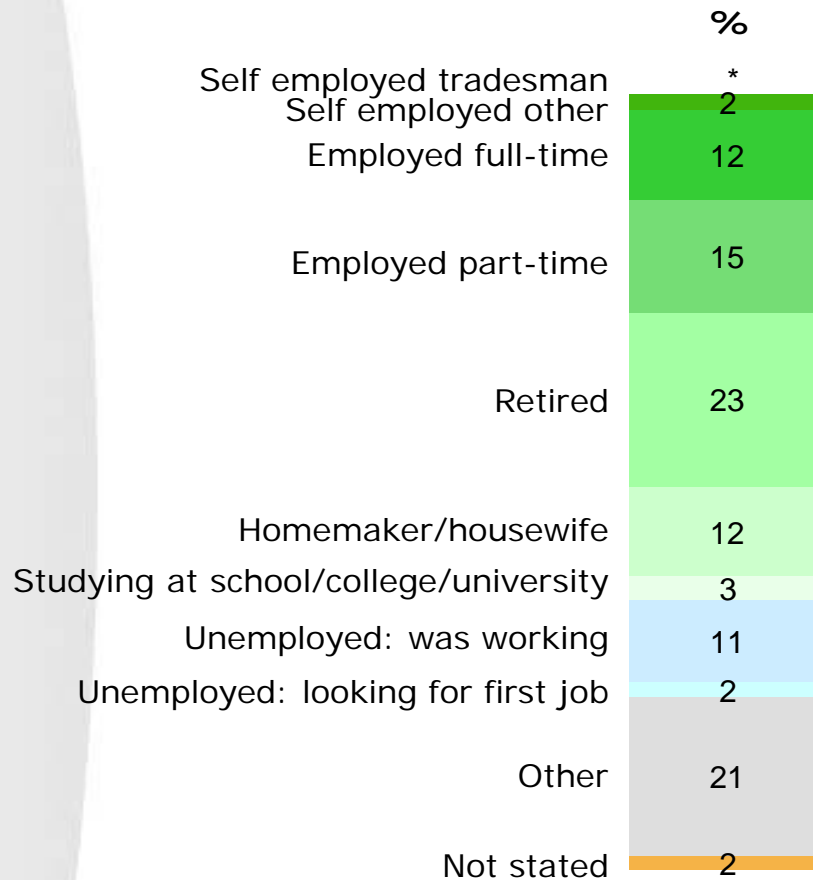
- Q. What is your gender?
- Q. Are you living with...?



Work and life status



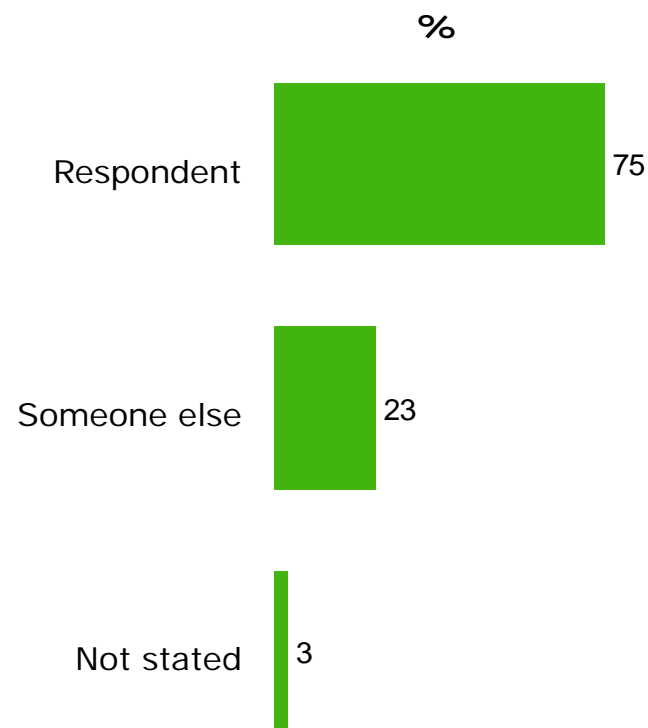
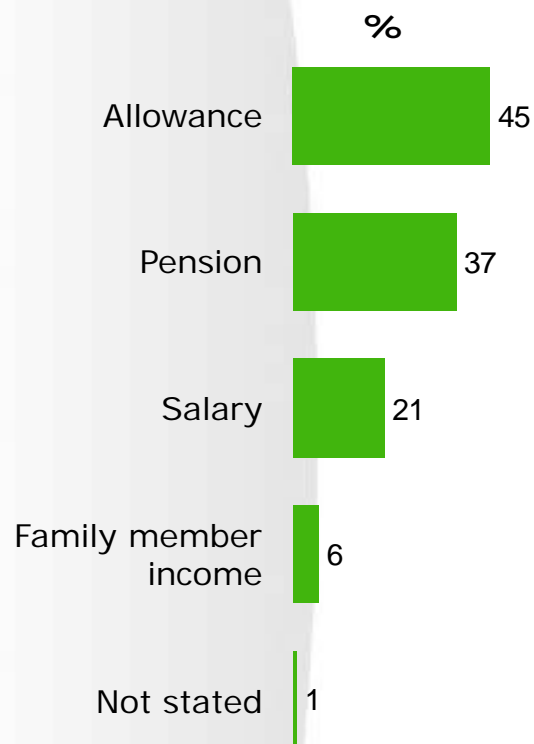
Q. Which of the following describes your work and/or life status?





Income source and bill payer

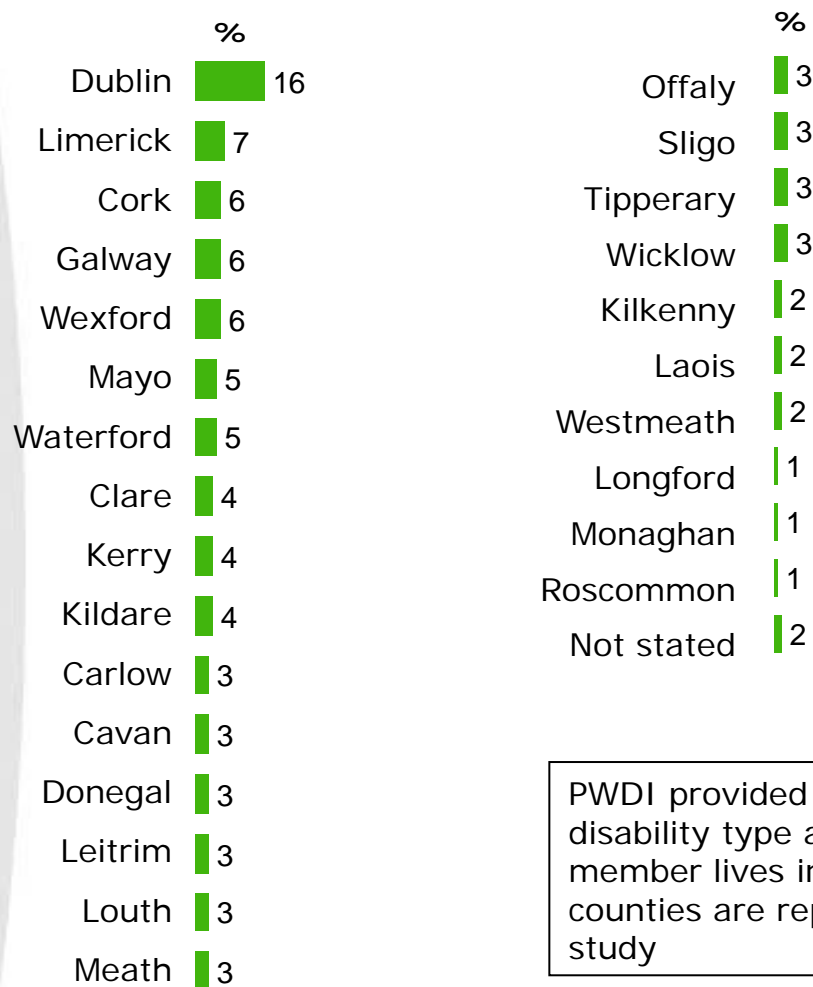
- Q. What is your income source?
Q. Who pays your telecommunications bills?





Location of respondents

Q. What county do you live in?



PWDI provided the sample based on disability type and region that the member lives in. As a result, all counties are represented in this study



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Research Findings



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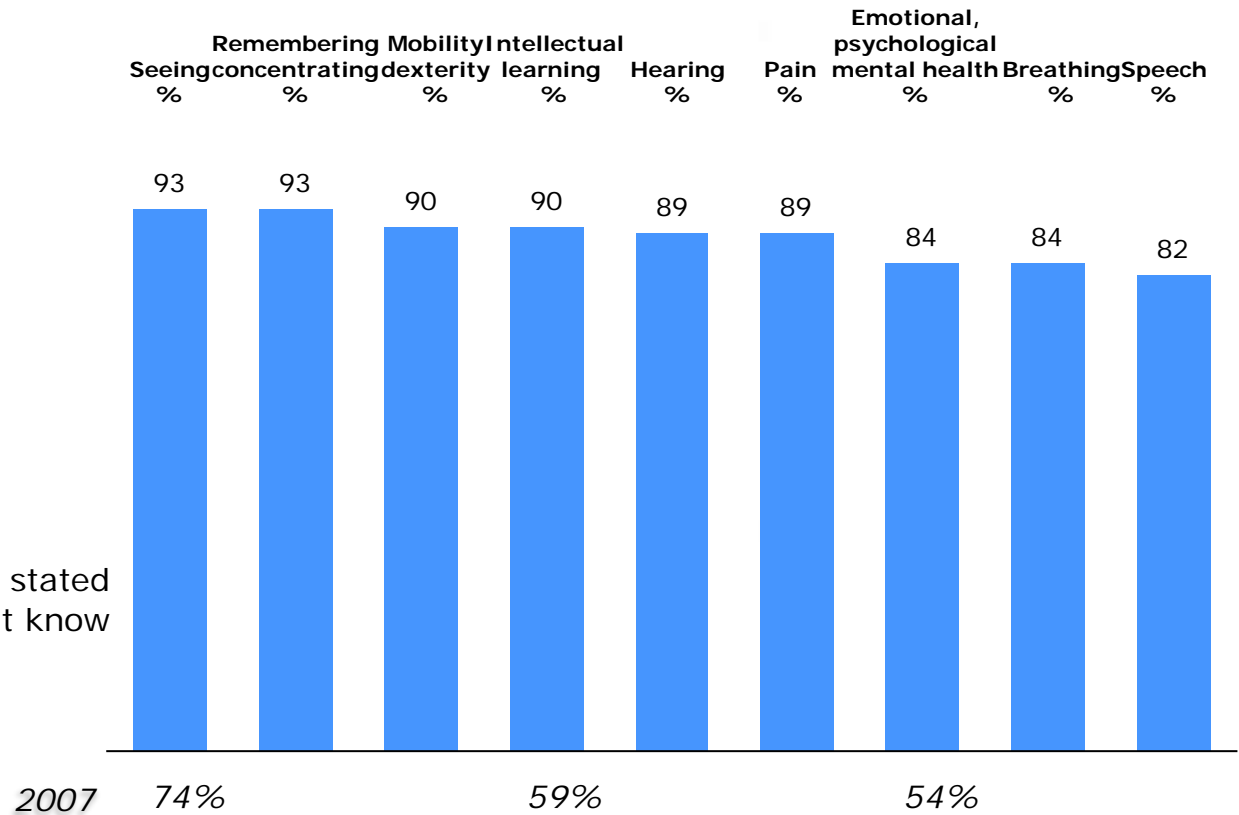
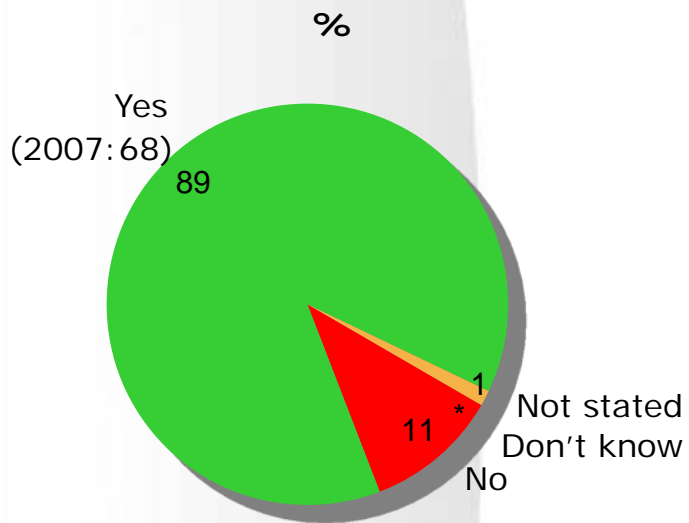


Residential Fixed Line Market

Nearly 9 in 10 users with a disability have a fixed line phone in their home



Q. Do you have a residential fixed line phone in your home, i.e. not a mobile phone?

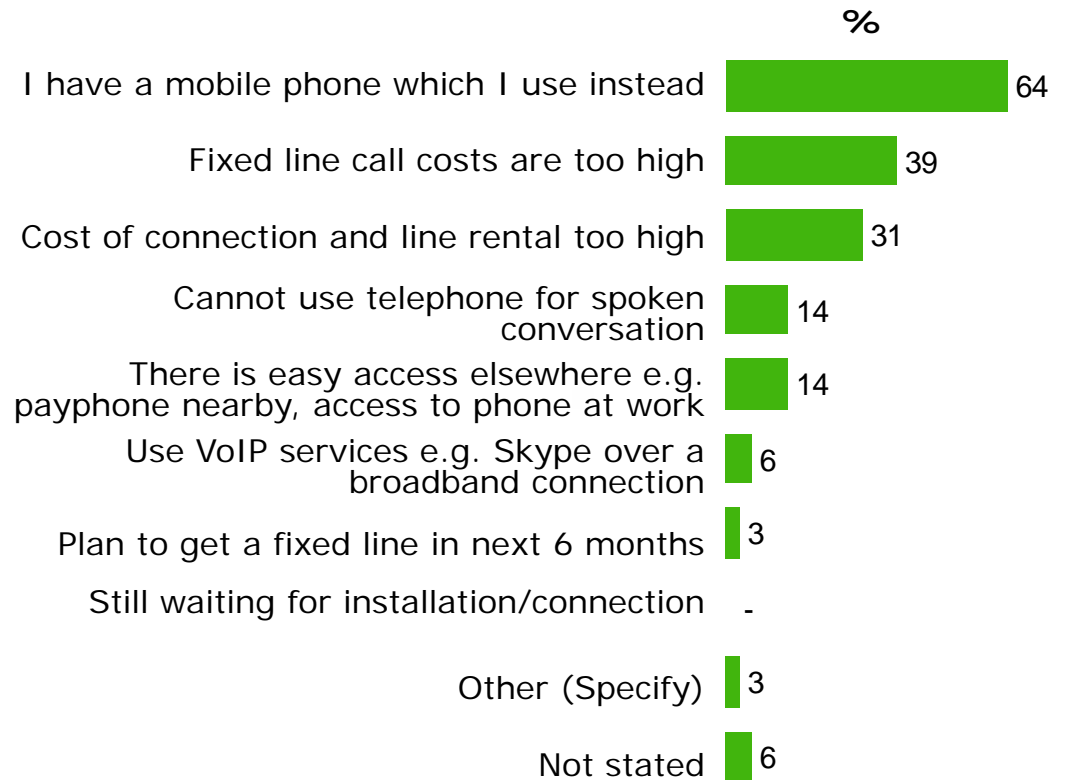
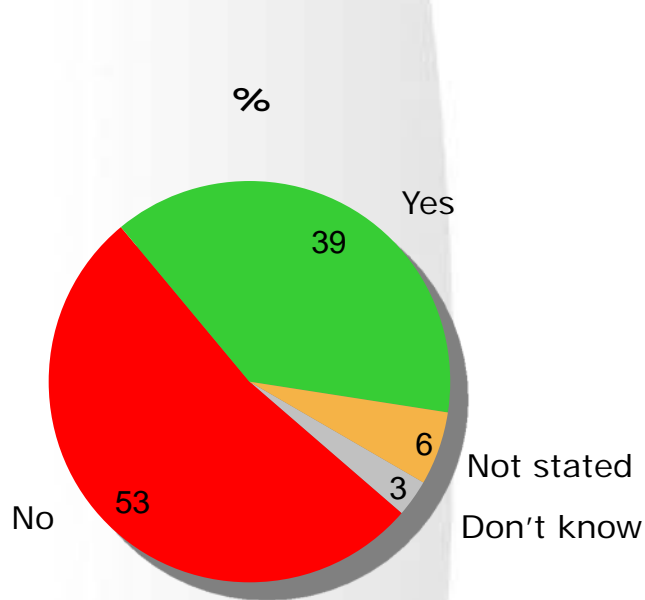


Note: Fixed line penetration for the general population is 65% (Q4 2009)

4 in 10 of those with no fixed line previously did have one



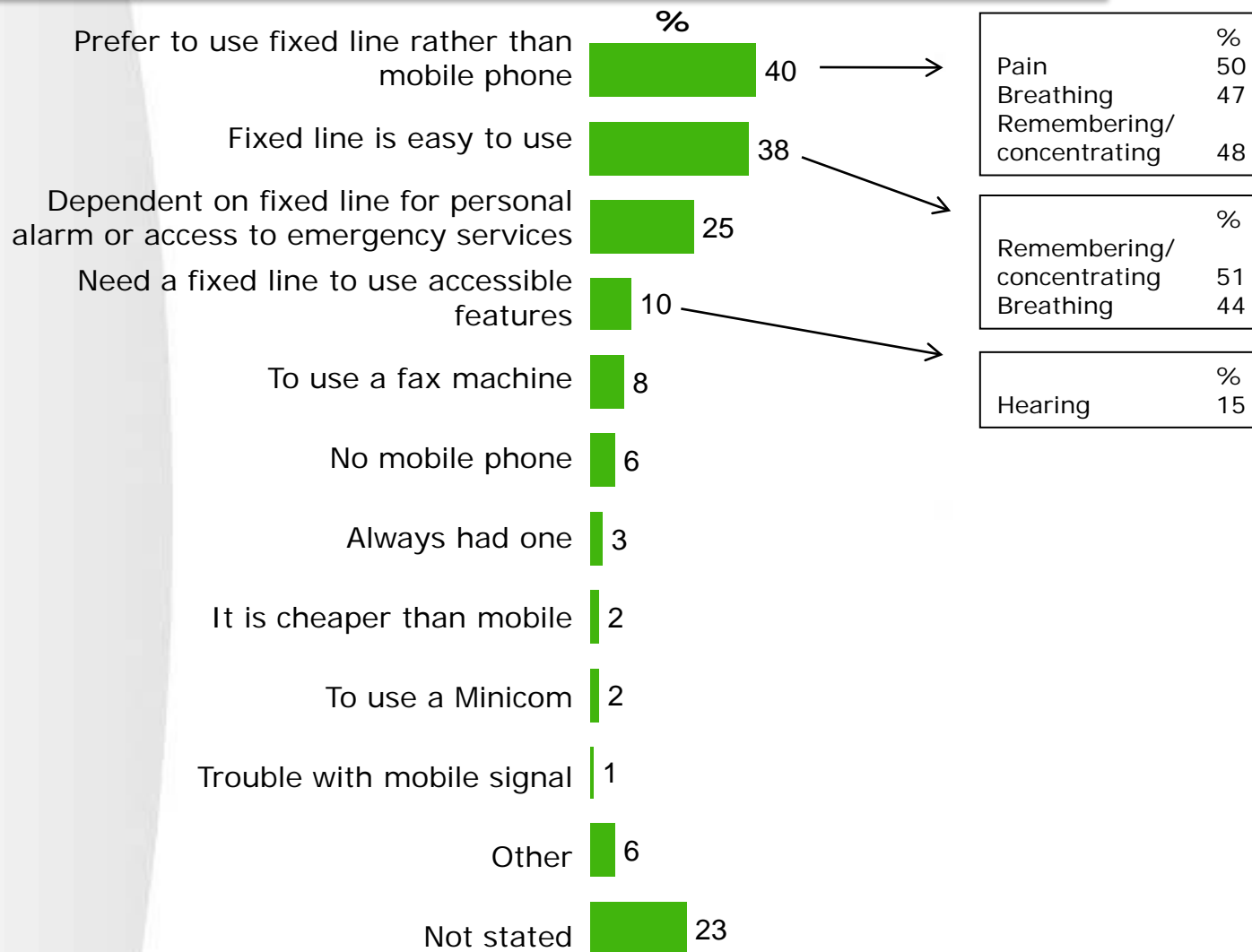
- Q. If you **do not have** a fixed line in your home, have you ever had a fixed line connection at your current address?
- Q. If you **do not have** a fixed line in your home, what are your main reasons for not having a fixed line telephone in your home?





"Preference for fixed line" and "ease of use" are the main reason for having a home fixed phone

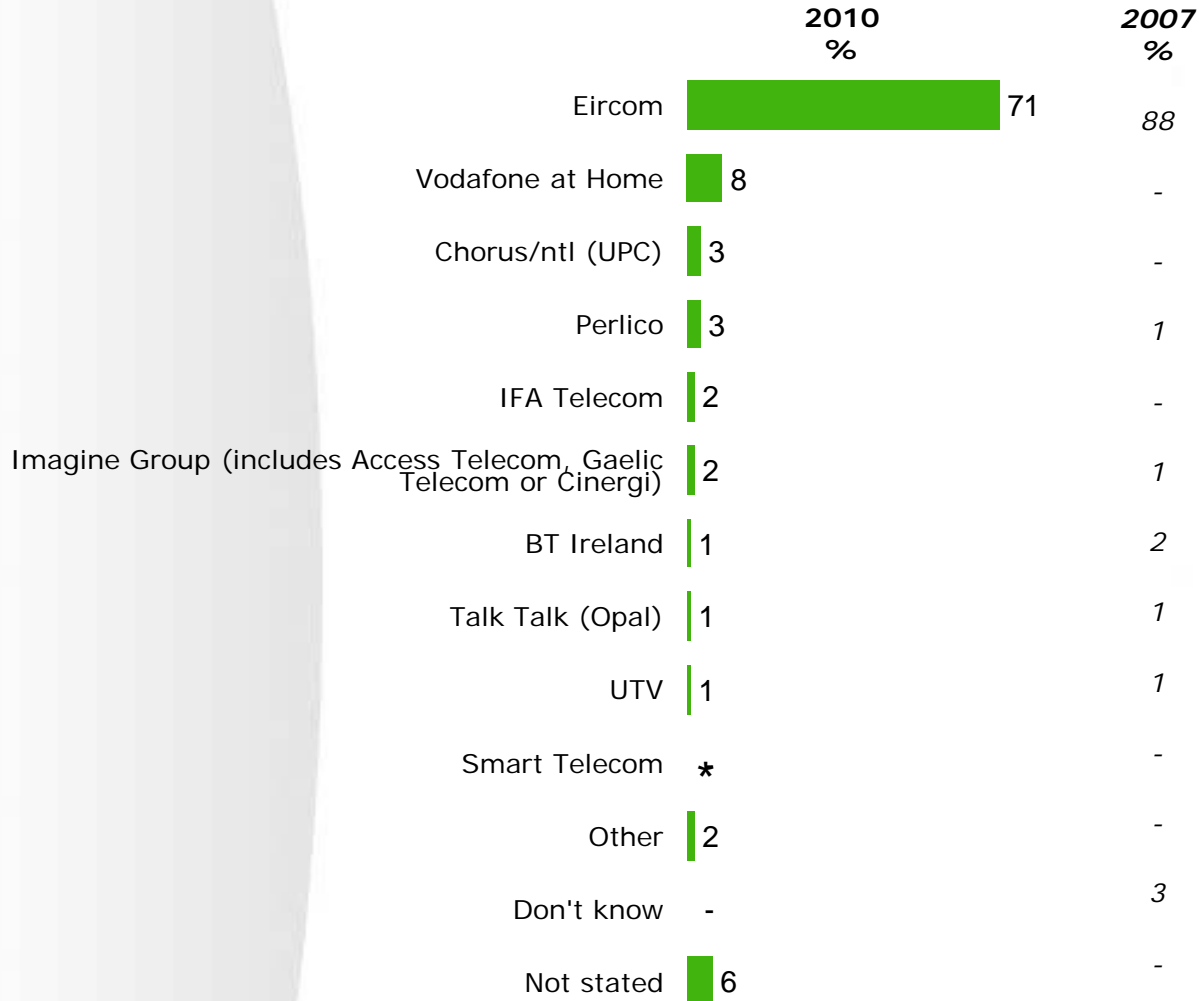
Q. If you **do have** a fixed line phone in your home, what are your main reasons for having a fixed line phone?



Eircom is the main fixed line home phone service provider among users with disabilities



Q. Which of the following companies do you use for your fixed line phone service?

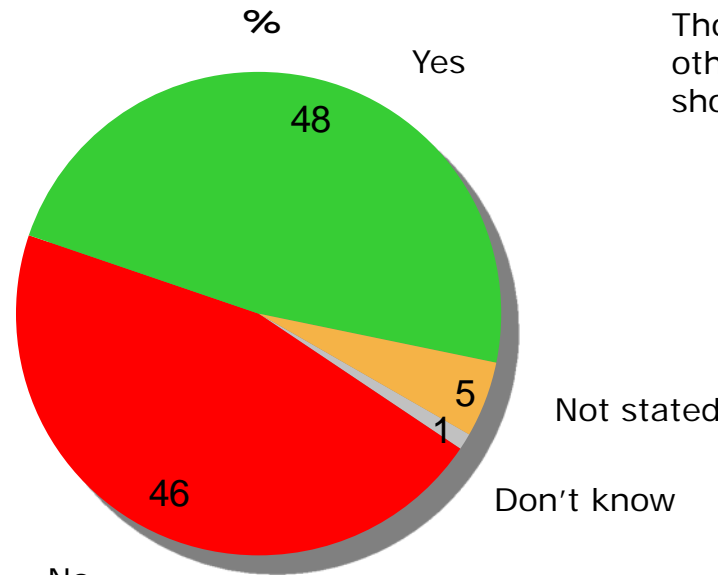


Note: use of Eircom for fixed line services among the general population is 71%(Q4 2009)

Half of fixed line users have shopped around to compare prices between fixed line operators



Q. Have you ever shopped around to compare prices or services between fixed line operators?



Those who used a provider other than Eircom more likely to shop around (85%).

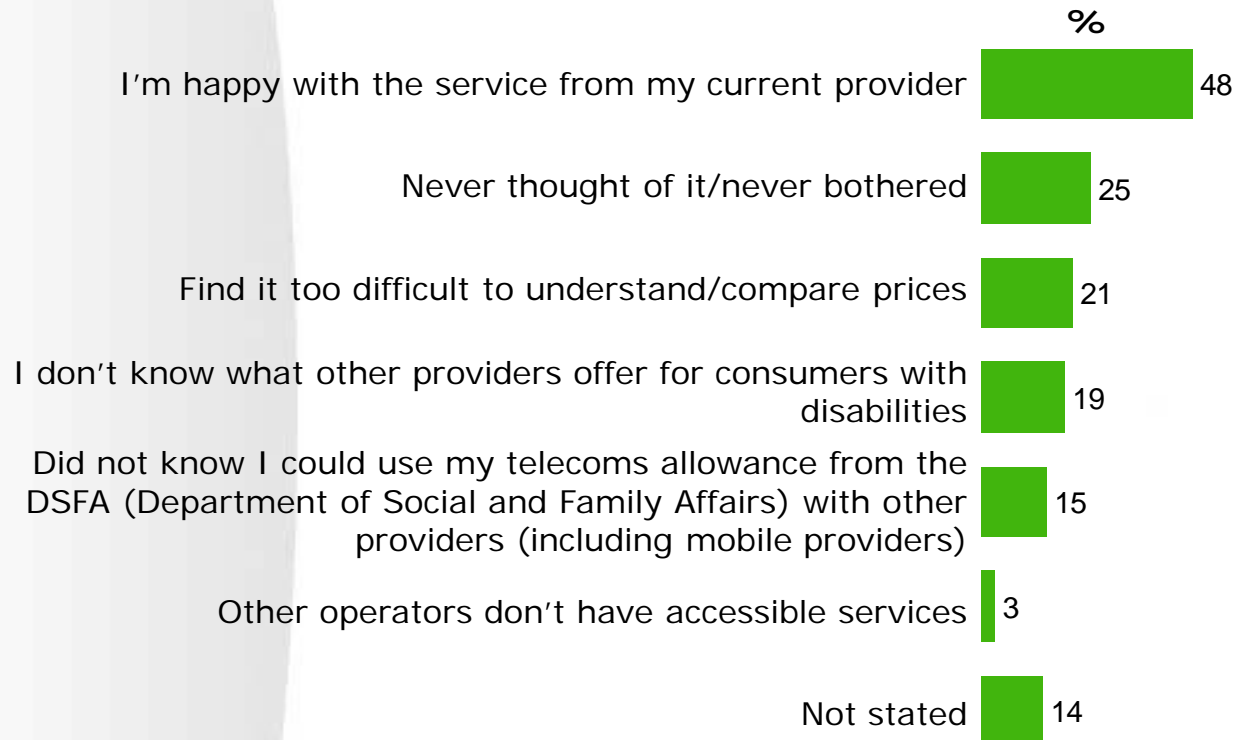
Speech 70% ← No

In 2007, 22% of fixed line users with disabilities shopped around to compare prices among operators.
Yes, only once: 12%
Yes, more than once: 10%



Satisfaction with current service provider is the main reason for not shopping around to compare prices of fixed line operators

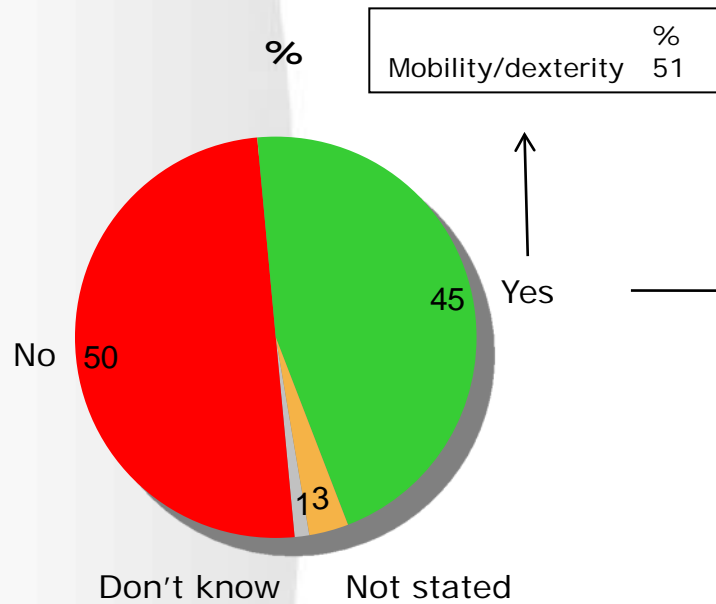
Q. **If you have not shopped around** to compare prices or services why have you not done so?



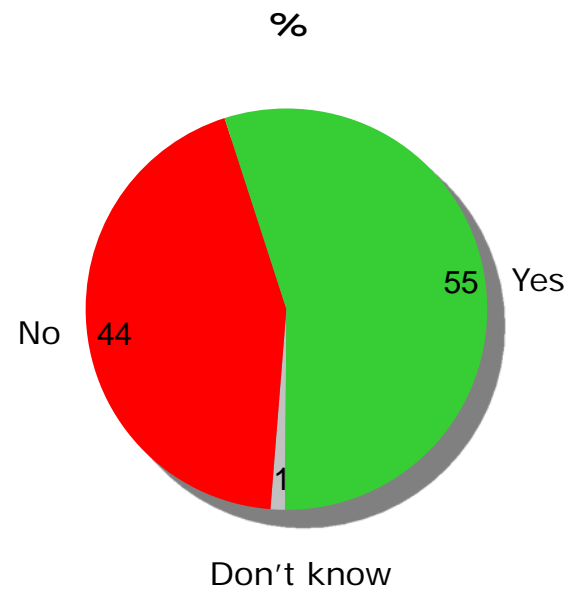
Over half of those who ever switched, switched back to their original fixed line provider



- Q. Have you **ever switched** your fixed line home phone provider?
- Q. **If you have switched fixed line provider**, have you switched back to your original provider, after your initial switch?



Base: All with a fixed line (n=278)



Base: All who have ever switched fixed line (n=126)



“Better value for money” is the main reason given for switching back, “poor customer service” and “no price savings” were also reasons for switching back

Q. **If you have switched back**, what were your main reasons for switching back to your original provider?

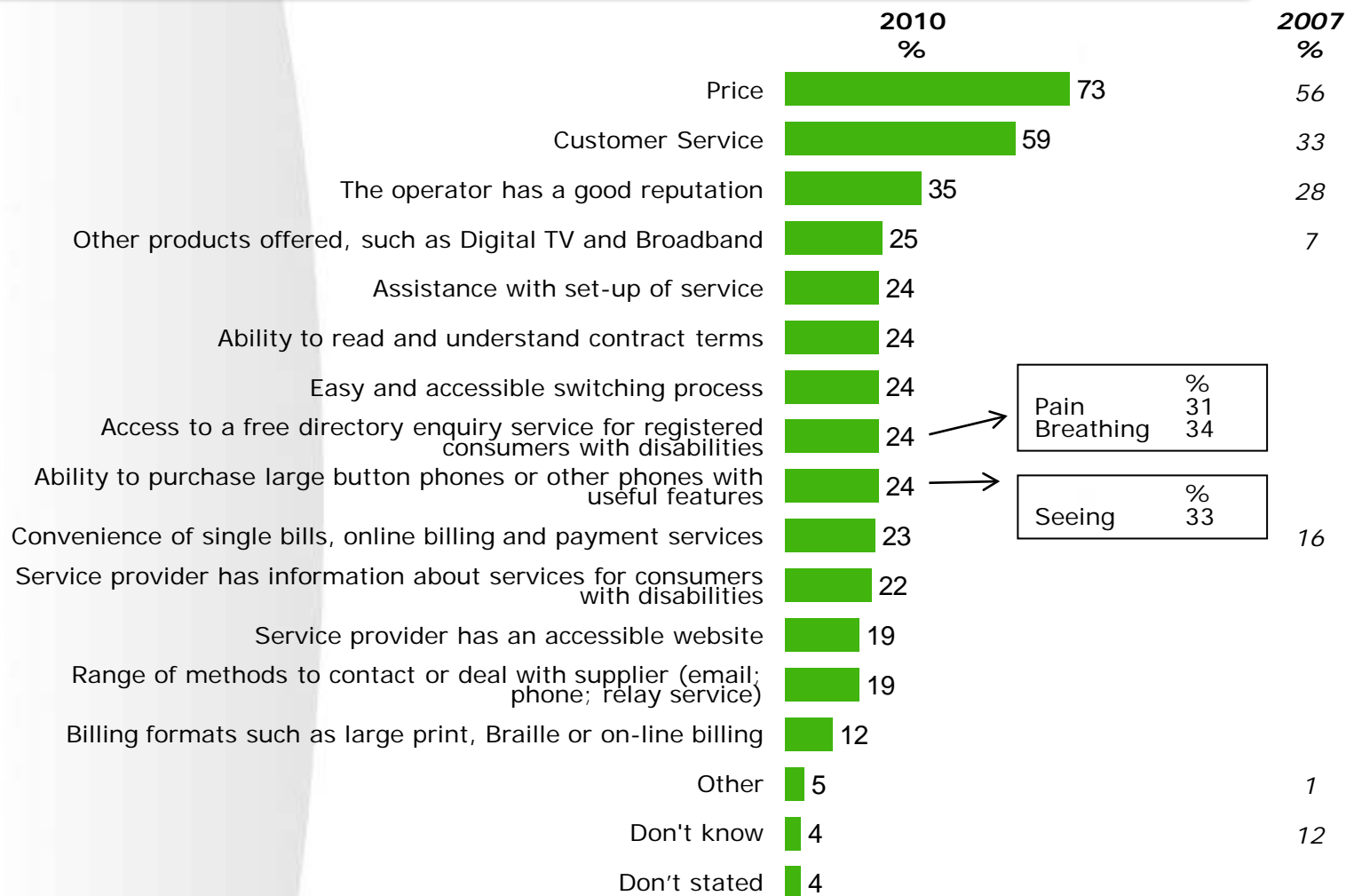


Base: All who switched back to original provider (n=69)

Price and customer service are the top most important considerations when selecting a fixed line provider



Q. What factors do you consider important when selecting a home fixed line provider?



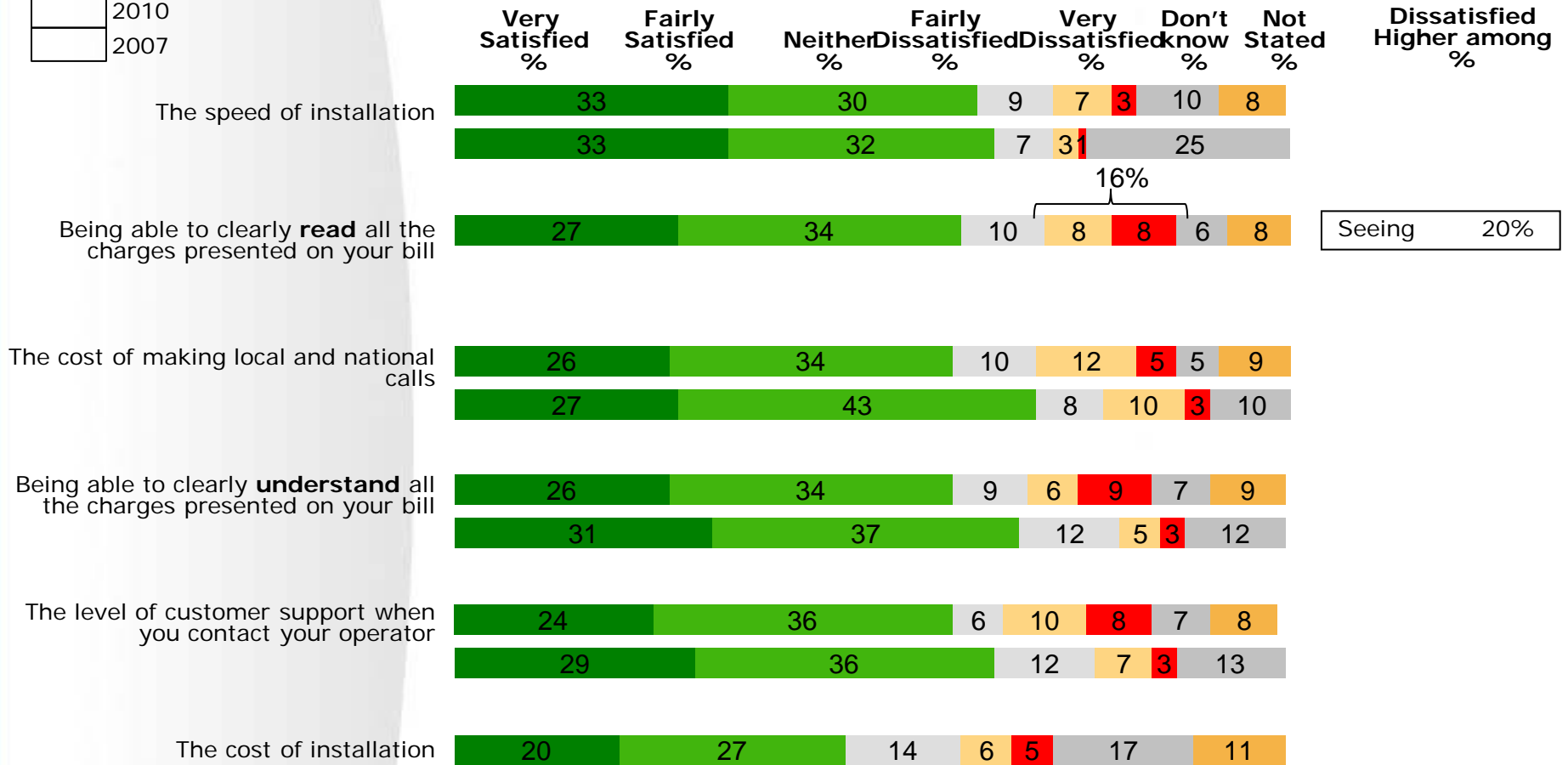
Base: All respondents (n=278)

Satisfaction ratings with fixed telephone service I



Q. On a scale of 1-5 were 1 indicates very dissatisfied, and 5 indicates very satisfied, please rate your satisfaction with the following aspects of your fixed telephone service?

2010
2007



Base: (n=278)

Satisfaction ratings with fixed telephone service II



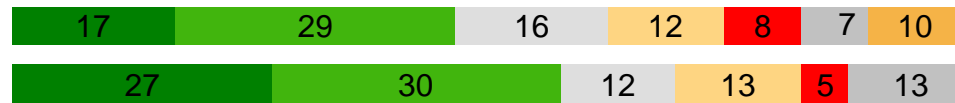
Q. On a scale of 1-5 were 1 indicates very dissatisfied, and 5 indicates very satisfied, please rate your satisfaction with the following aspects of your fixed telephone service?

2010
2007

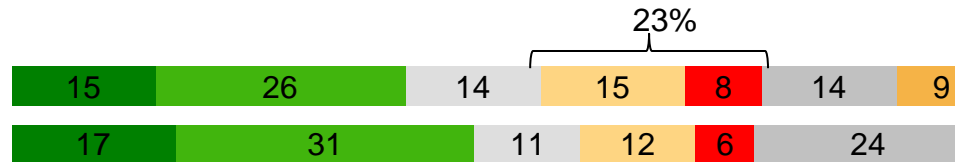
Very Satisfied % Fairly Satisfied % Neither % Fairly Dissatisfied % Very Dissatisfied % Don't know % Not Stated %

Dissatisfied Higher among %

The cost of fixed line rental charges



The cost of making international calls



Seeing 28%

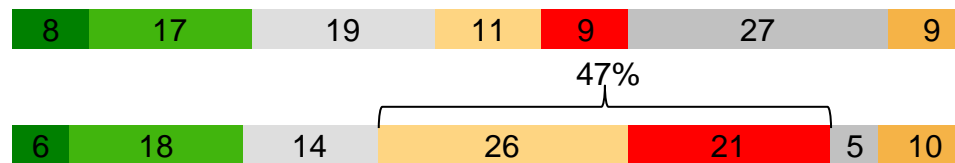
The overall cost of your fixed line service



The range of accessible products and accessible services available from your operator



The information that your service provider has about services for consumers with disabilities



Mobility/Dexterity 52%

The cost of making calls to mobiles

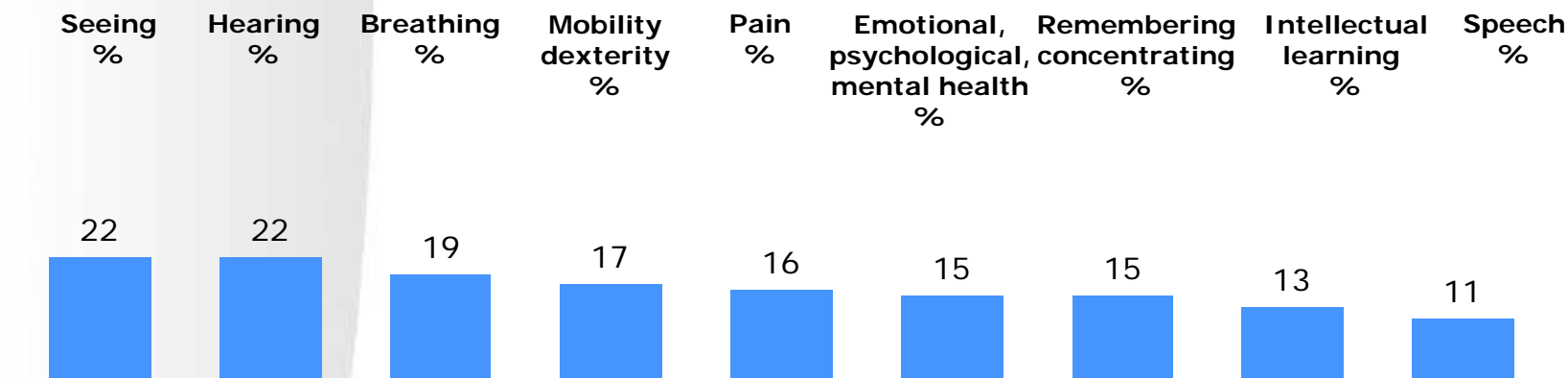
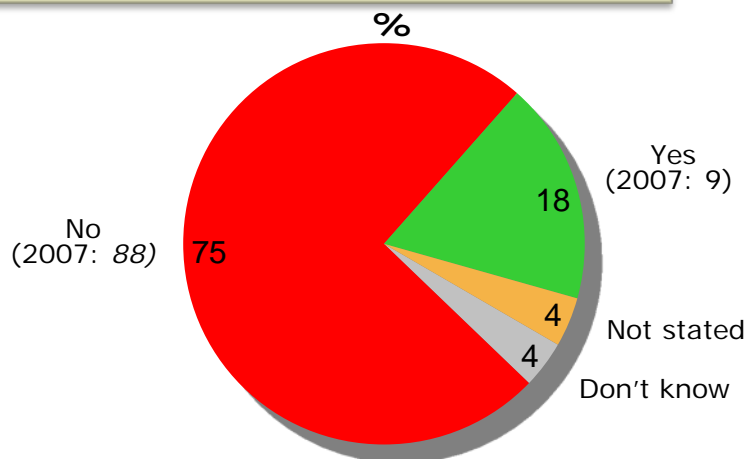


Base: (n=278)

Those with seeing or hearing difficulties slightly more likely to have contacted operator for special equipment



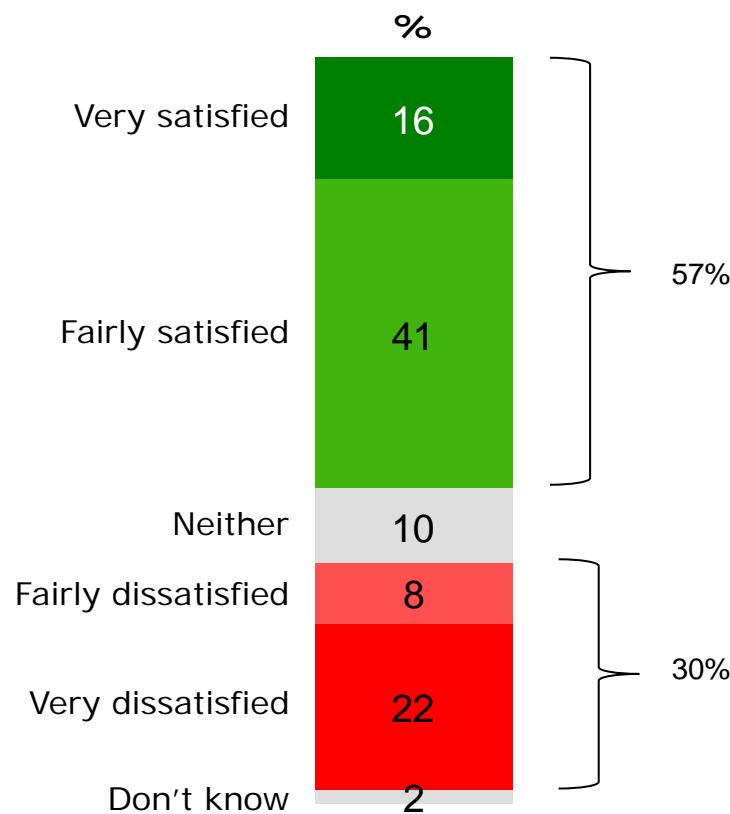
Q. Have you ever approached your fixed line operator regarding special equipment or services which would make using your fixed line service easier to use?



Nearly 6 in 10 satisfied with response to request for additional services from fixed line operator, however a sizeable 30% dissatisfied



Q. How satisfied were you with the response of your fixed line operator to request for additional services?



Having a reliable fixed line is vital for the vast majority of fixed line users



Q. Please rate the following statements based on a scale of 1-5 where 1 means strongly disagree, and 5 means strongly agree

2010
2007

Strongly Agree % Agree % Neither % Disagree % Strongly Disagree % Don't know % Not stated %

Having a reliable fixed line telephone service is vital so that I can contact people, and am contactable*



I find my fixed line telephone service easy to use



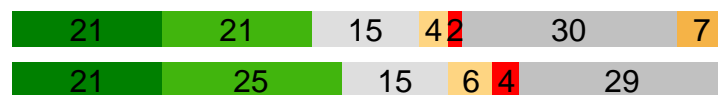
I find it easy to **read** my telephone bill



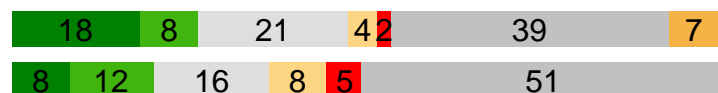
I find it easy to **understand** my telephone bill



I believe there may be services available that may make using the fixed line phone easier for me



Special equipment for the fixed line phone is too expensive for me to purchase

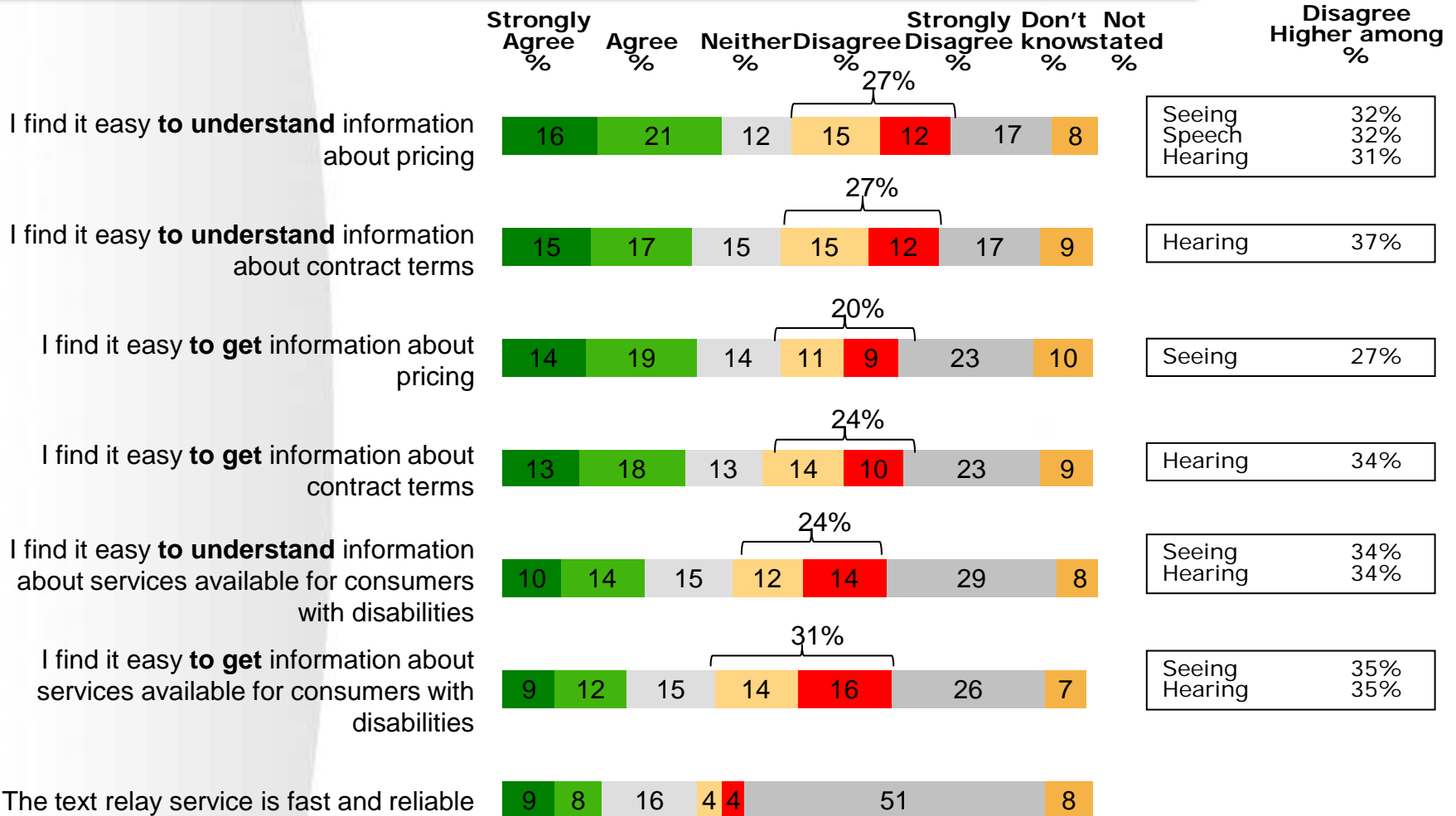


*Note: some changes in statement wording since 2007

There are some issues around getting and understanding information around fixed telecommunications services



Q. Please rate the following statements based on a scale of 1-5 where 1 means strongly disagree, and 5 means strongly agree

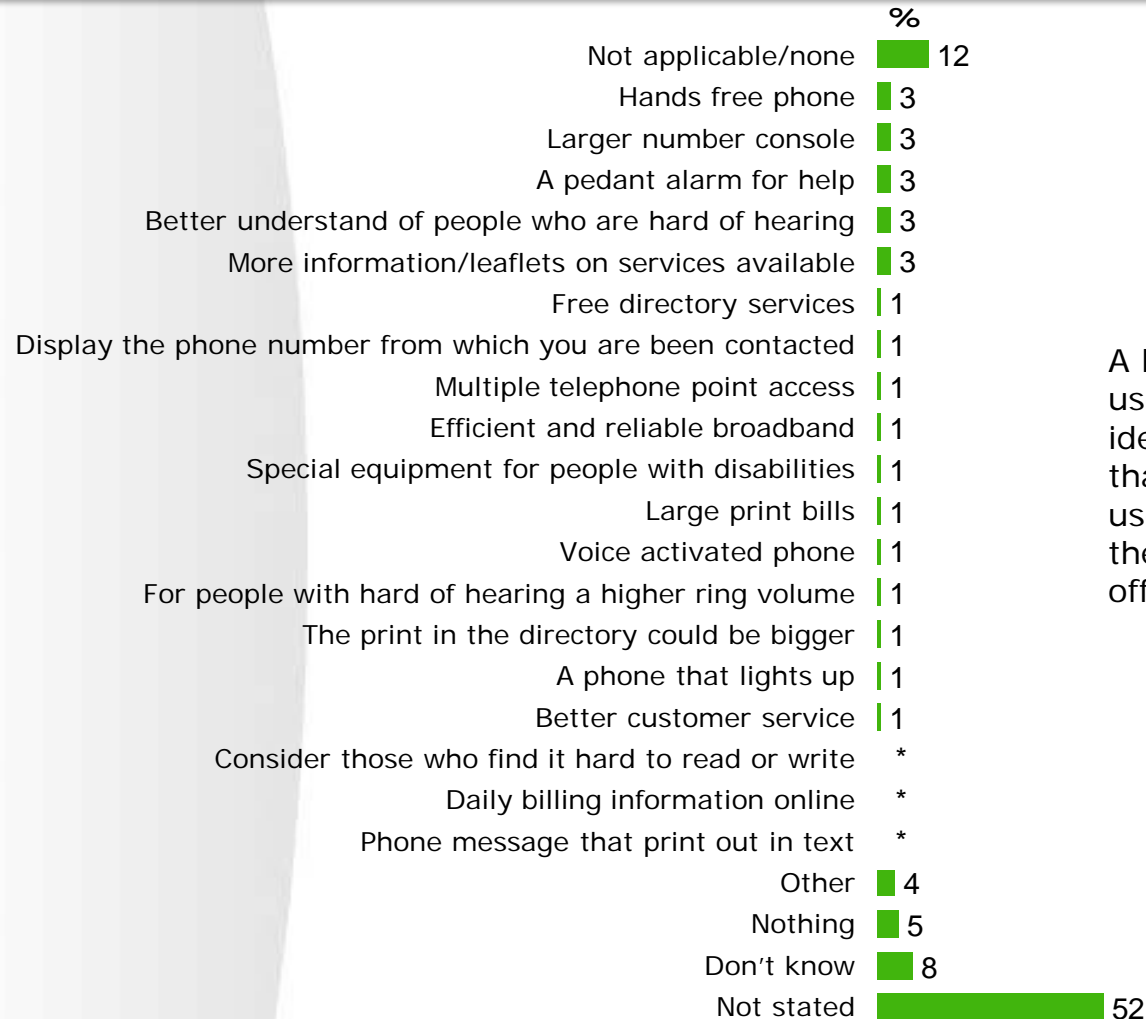


Base: All with fixed line (n=278)



There are very low numbers of fixed line users who identify the need for additional services

Q. Are there any services that your fixed line provider does not offer that you believe would aid you as a customer with disabilities to use a fixed line telephone service?

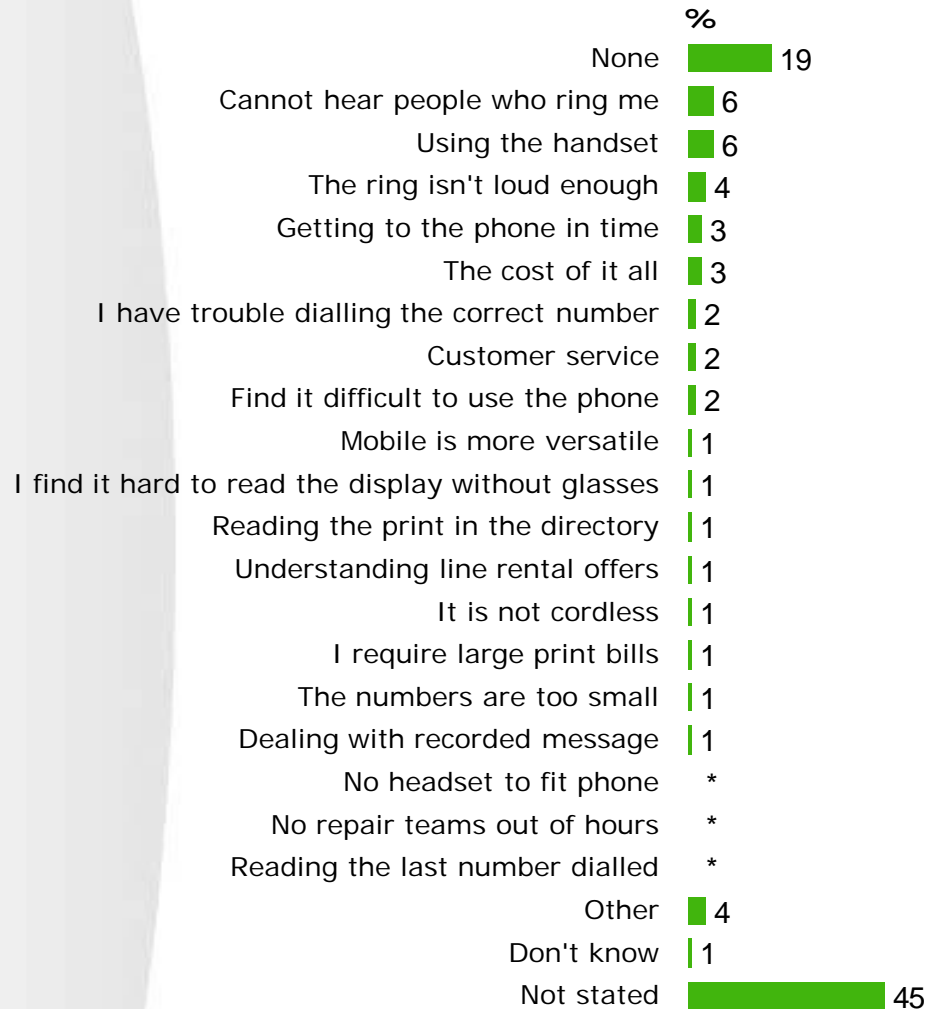


A large number of fixed line users with disabilities did not identify any additional services that they believe would aid their use of fixed line phone that their provider does not already offer.



Difficulties using a fixed line phone

Q. What is the biggest difficulty that you have using your fixed line phone?



Base: All with a fixed line (n=278)



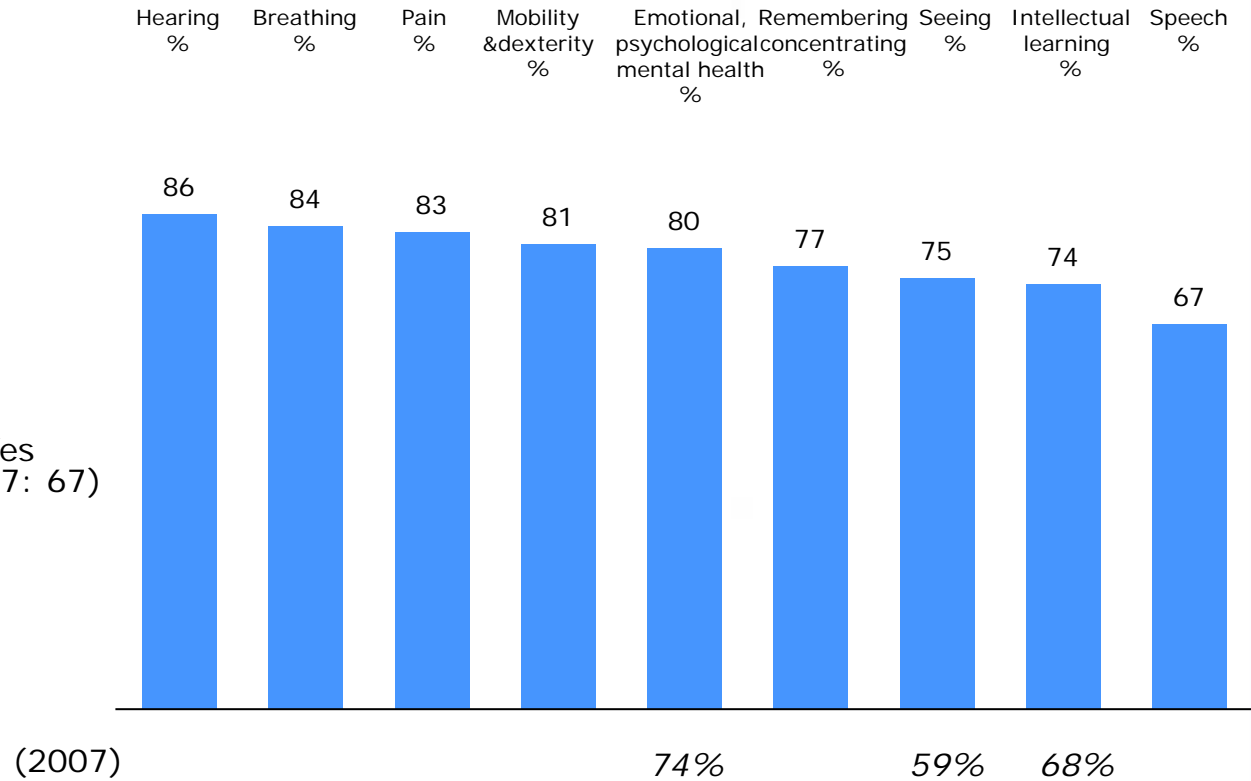
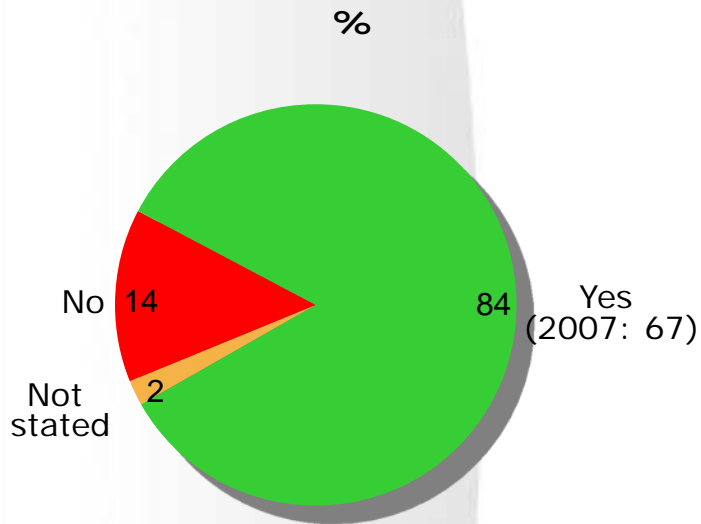
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Mobile Phone

Use of mobile phone is lowest among users with speech difficulties



Q. Do you have a mobile phone?



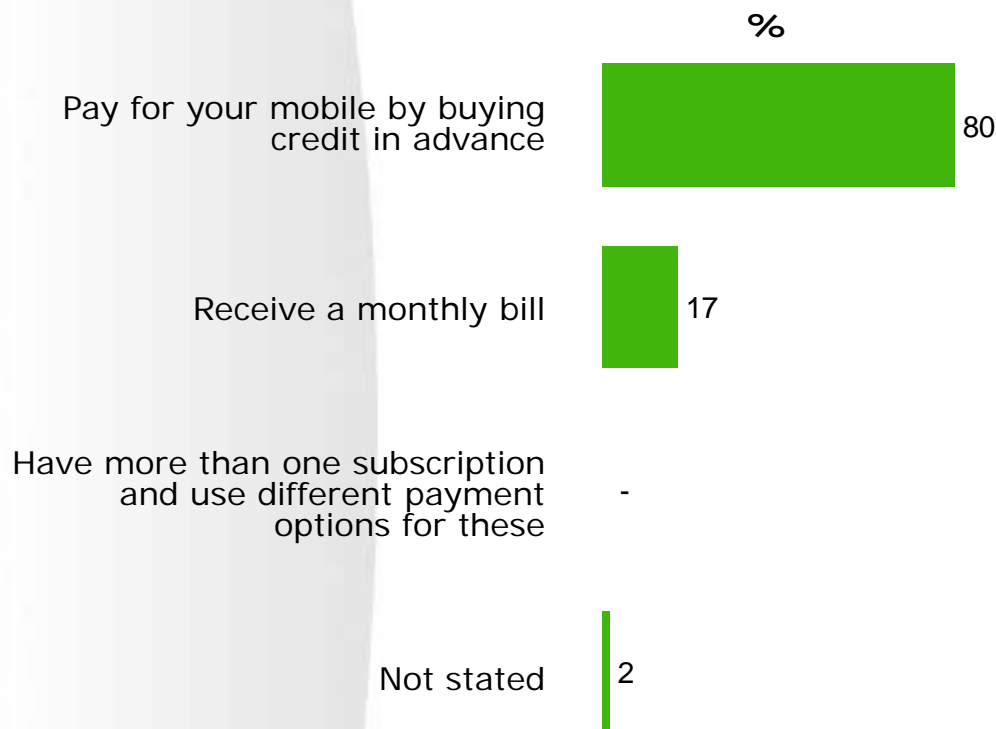
Base: All respondents (n=314)

Note: 95% of all adults have a mobile phone

Pre pay mobile phones are the most popular payment option for users with disabilities



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

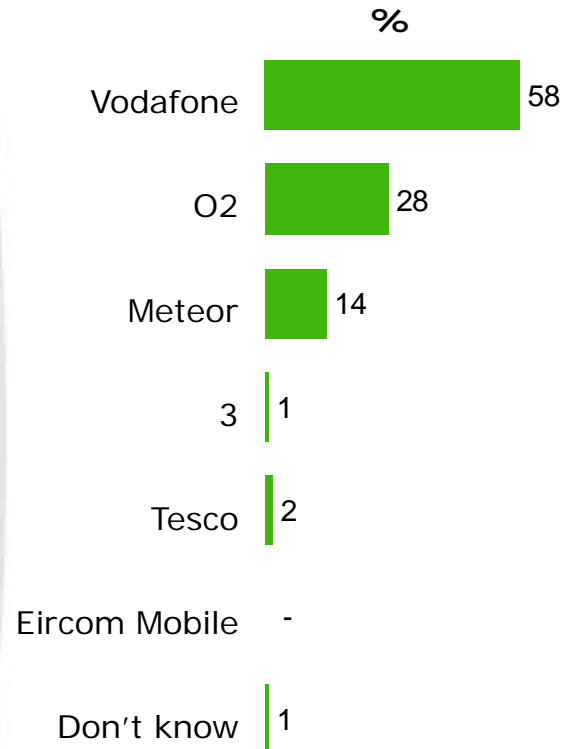


Note: 69% of all adults with a mobile phone have a pre pay phone

Use of Vodafone among users with disabilities is at nearly 60%



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



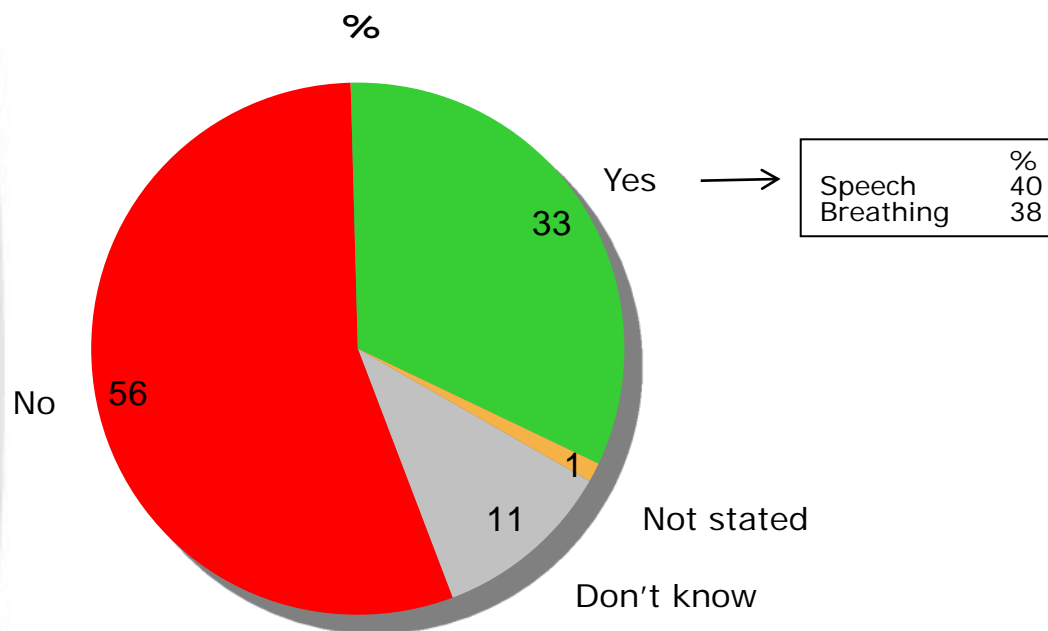
Note: market share among all adults

Vodafone	44%
O2	30%
Meteor	25%
3	2%
Tesco	1%

A third of users with disabilities who have a mobile phone have a 3G handset



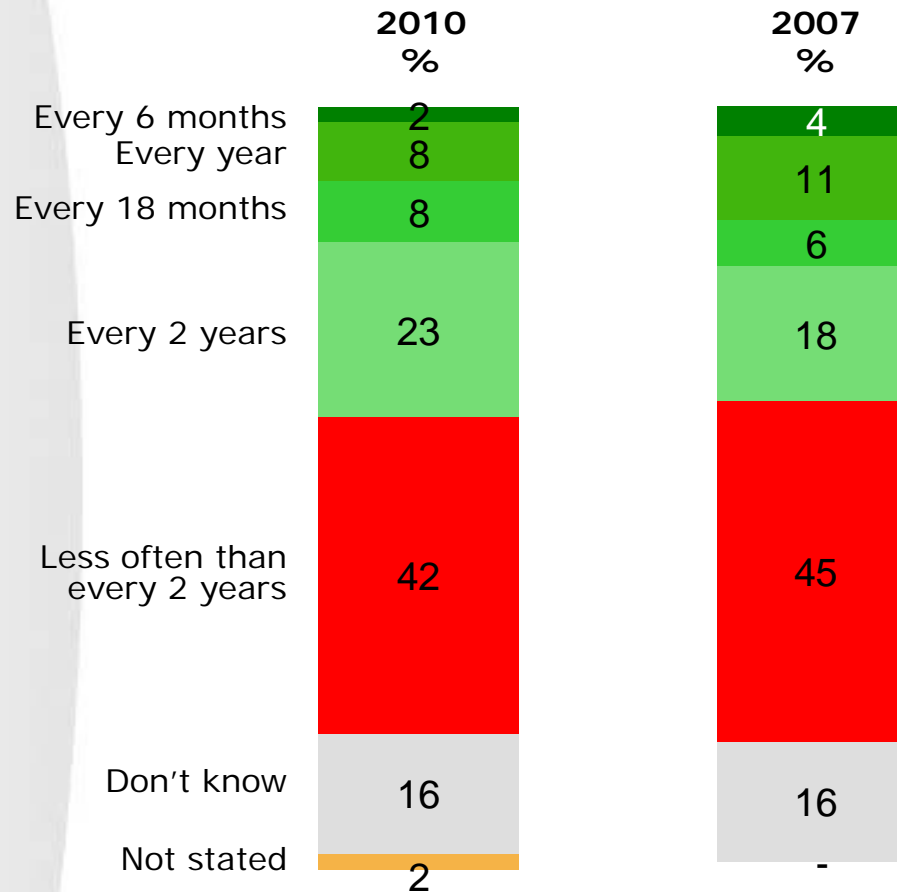
Q. Do you have a mobile phone that allows you to do things such as access the Internet or make video phone calls?



Over 4 in 10 users with disabilities change their mobile handset less often than once every 2 years



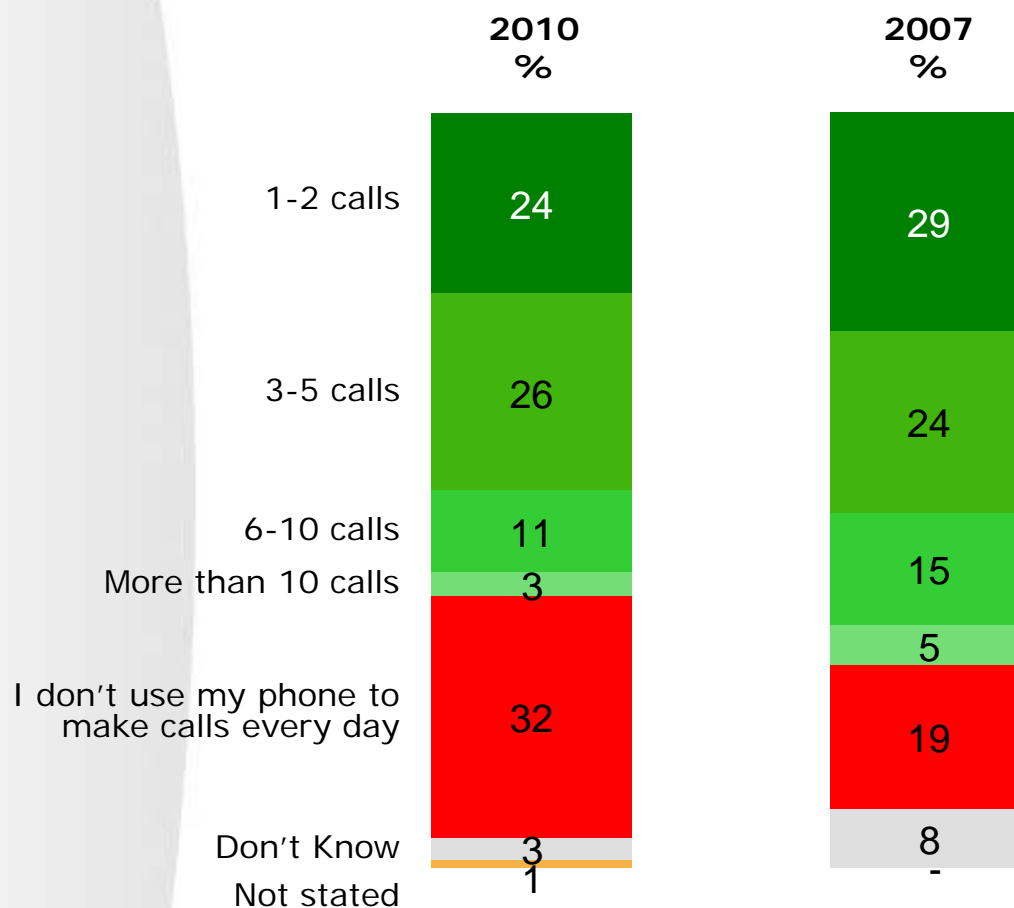
Q. How often do you change your mobile phone handset?





Average number of calls made over mobile per day

Q. How many calls do you make on your mobile phone on an average day?

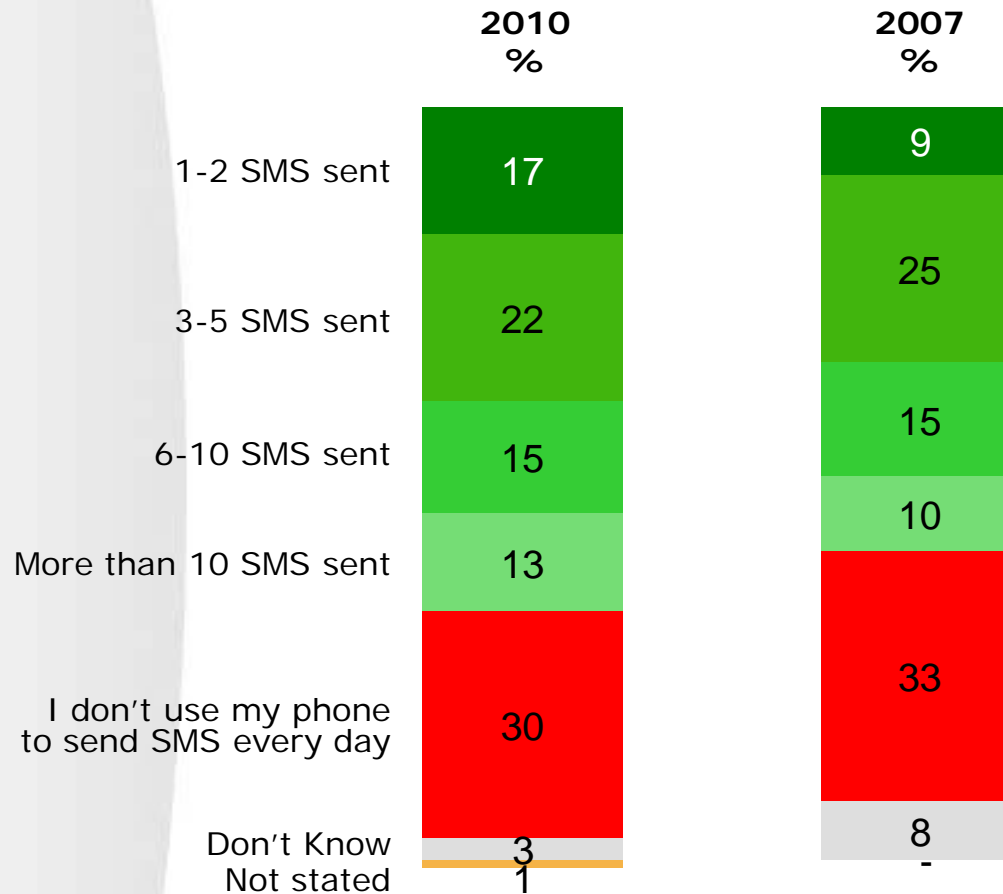


Base: All with mobile phone (n=264)

Average number of SMS sent per day



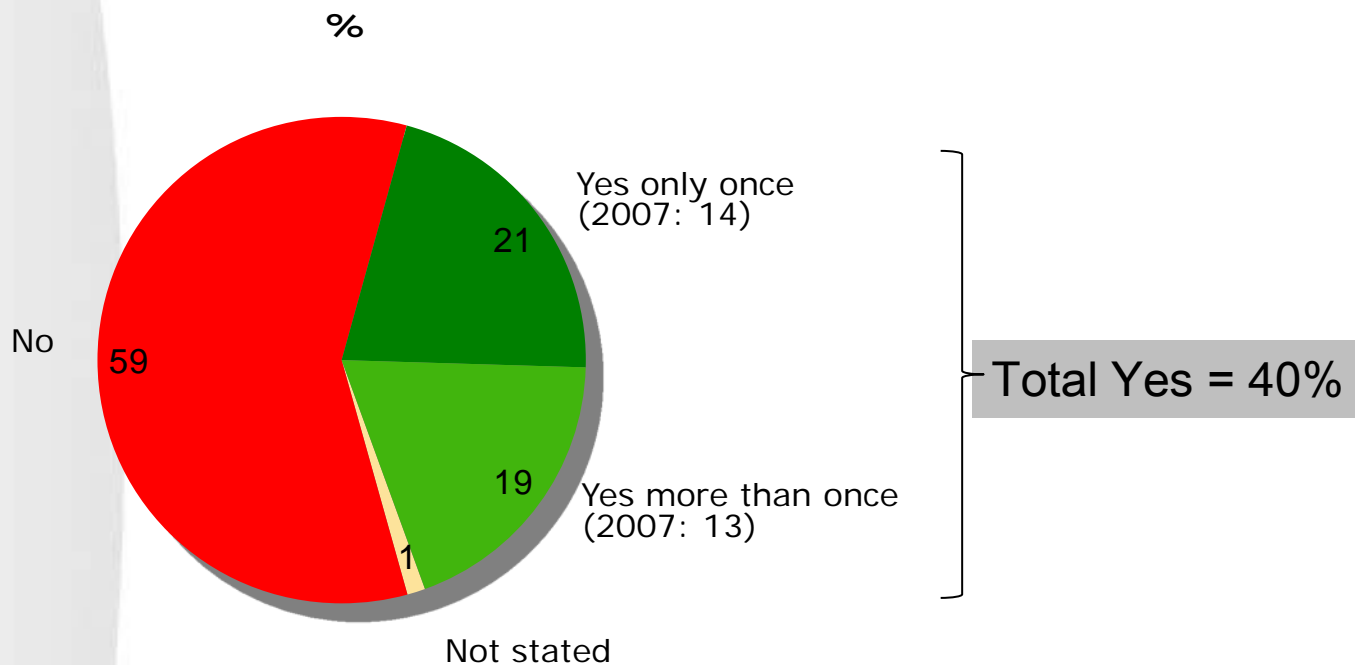
Q. How many text messages (SMS) do you **send** on your mobile phone on an average day?



40% of users with mobile phones have shopped around at least once to compare prices between mobile phone operators



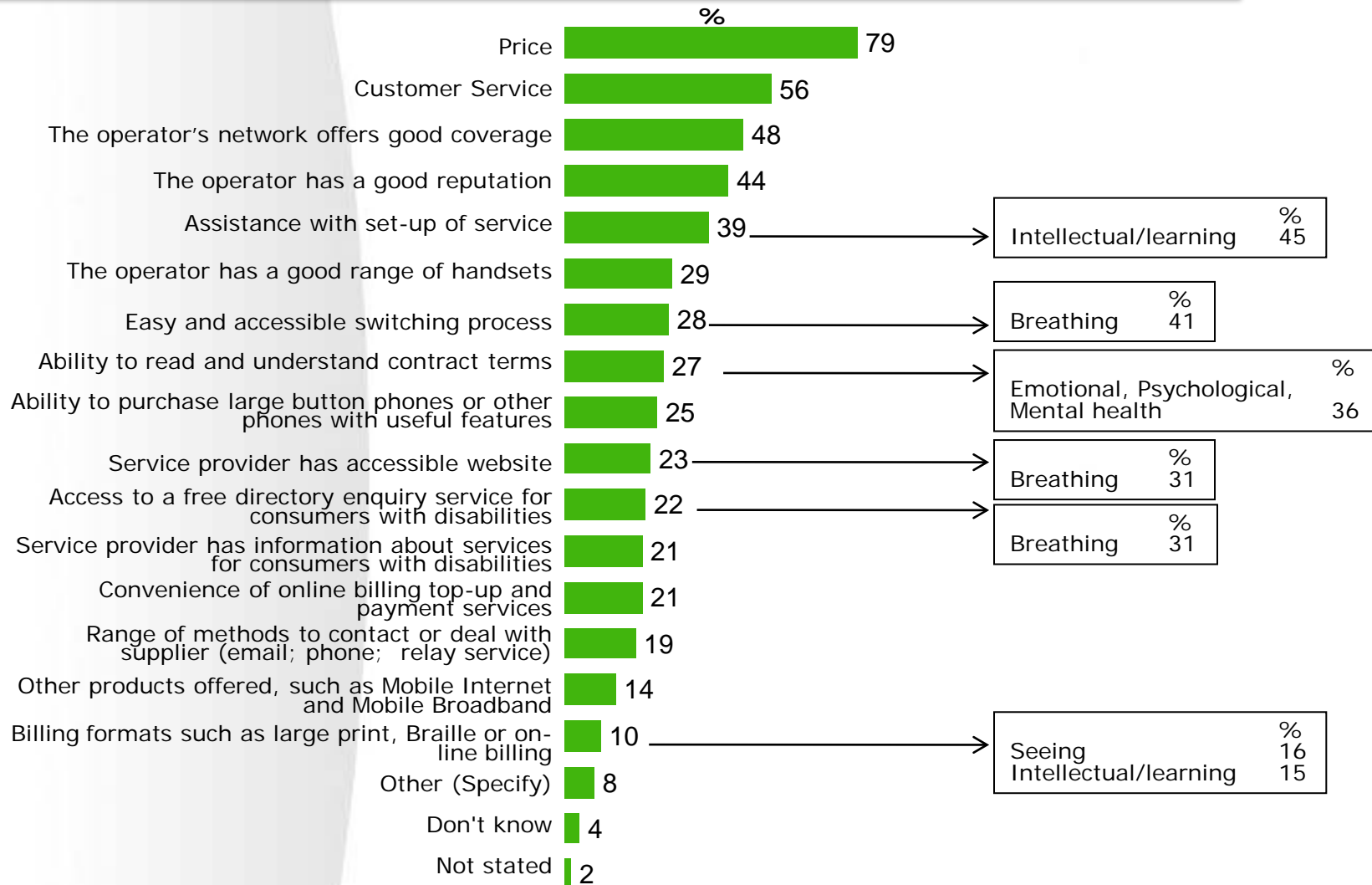
Q. Have you ever shopped around to compare prices and services between mobile operators?



Price, followed by customer service are considered most important factors when selecting mobile phone provider



Q. What factors do you consider important when selecting a mobile phone provider?



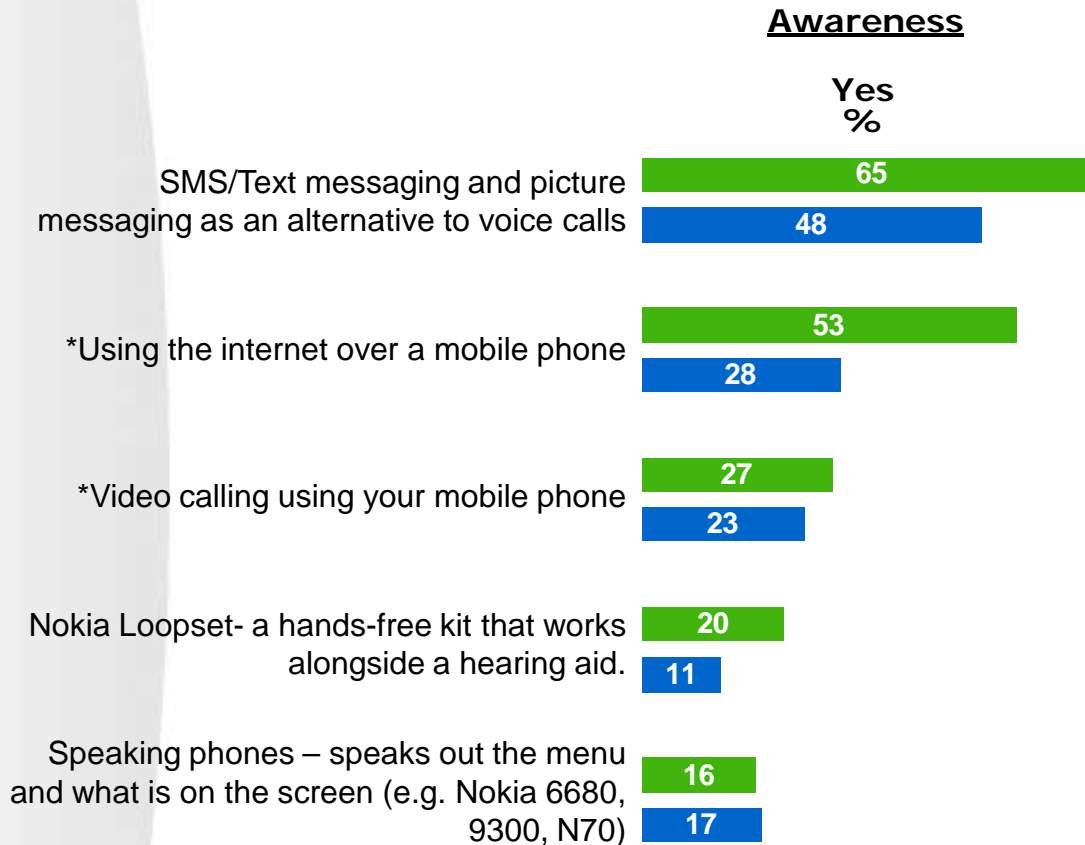
Base: All with mobile phone (n=264)

Awareness of accessible mobile phone services



Q. Are you **aware** of the following mobile telephone services or features which make mobile phone use more accessible to users with disabilities?

2010
2007



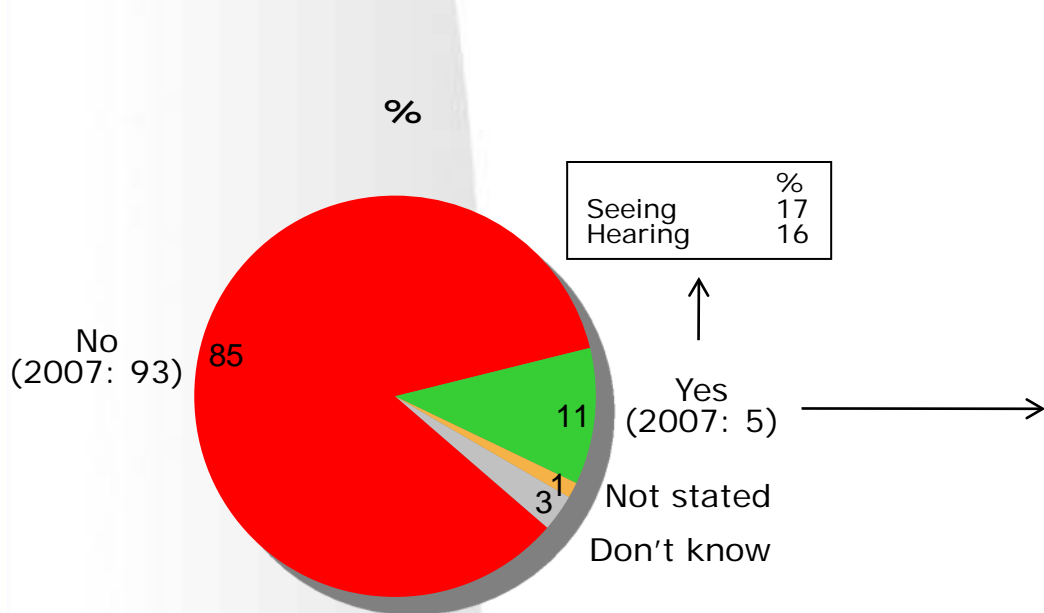
Base: All With Mobile Phone (n=264)

*Note: some changes in statement wording since 2007

Low levels of contacting operator regarding special equipment to make mobile service easier to use



- Q. Have you ever approached your mobile operator regarding special equipment or services which would make your mobile phone service easier to use?
- Q. How satisfied were you with the response of your mobile operator to your request for additional services?



Base: All mobile phone owners (n=264)

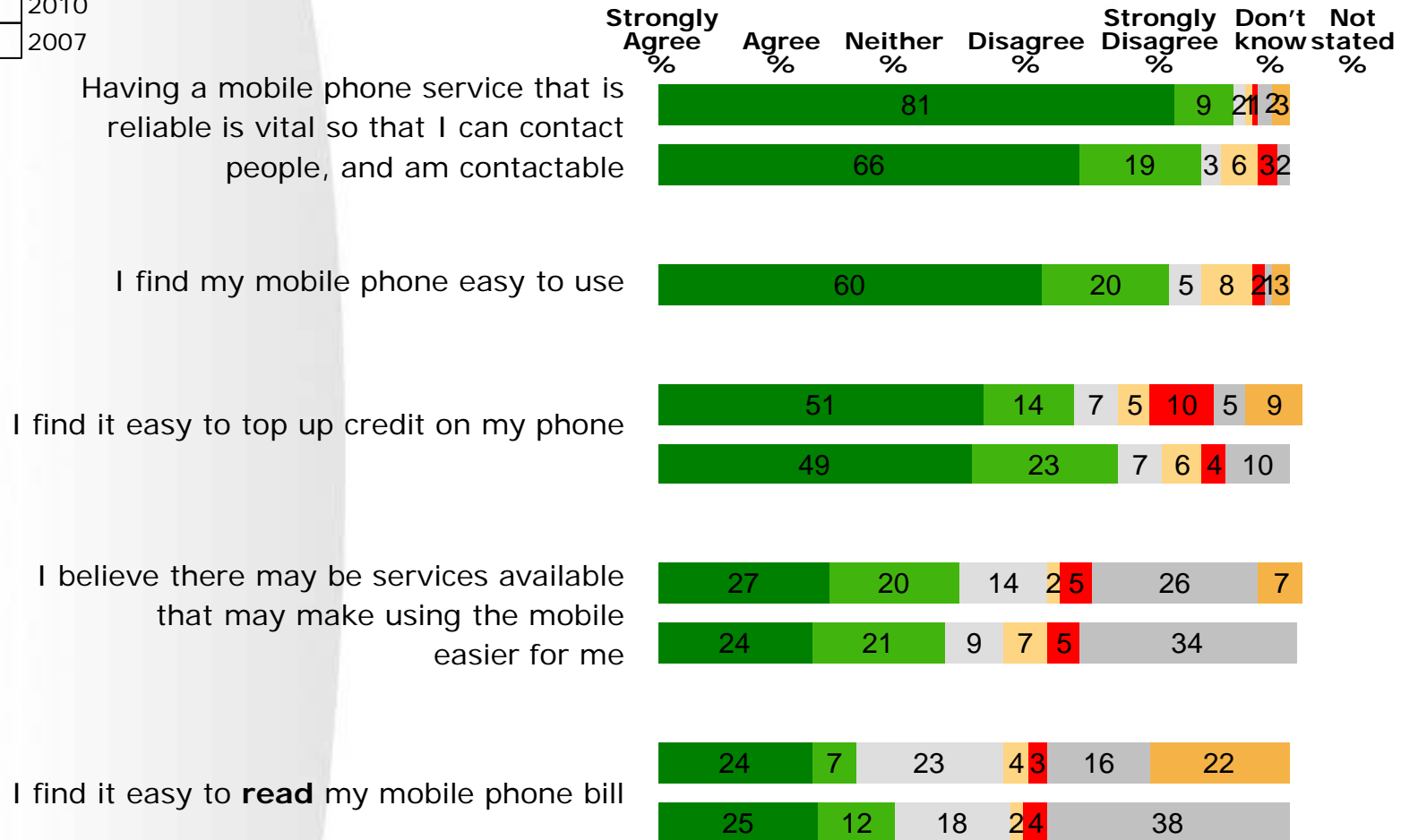
Base: All who contacted provider (n=30*)

Having a reliable mobile service is vital for the vast majority of mobile users



Q. Please rate the following statements based on a scale of 1-5 where 1 means strongly disagree, and 5 means strongly agree.

2010
2007



There are some issues around understanding information about mobile services that are available



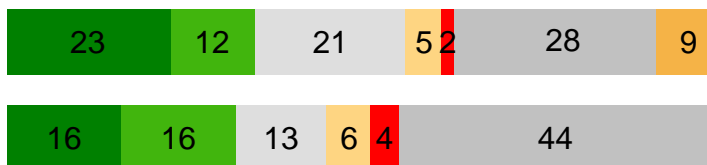
Q. Please rate the following statements based on a scale of 1-5 where 1 means strongly disagree, and 5 means strongly agree.

2010
2007

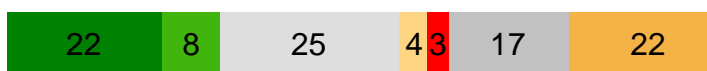
Strongly Agree % Agree % Neither % Disagree % Strongly Disagree % Don't know % Not stated %

Disagree Higher among %

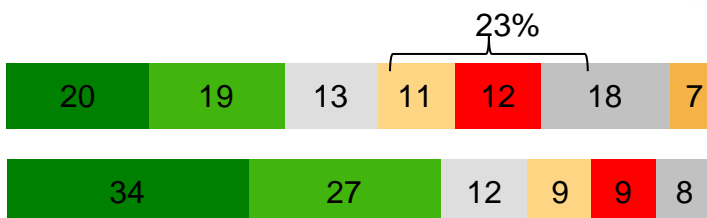
Special equipment for the mobile phone is too expensive for me to purchase



I find it easy to **understand** my mobile phone bill

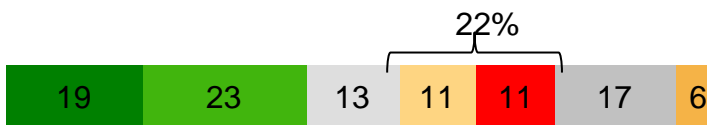


I find it easy to **understand** information about mobile services that are available



Speech 40%

I find it easy to **read** information about mobile services that are available

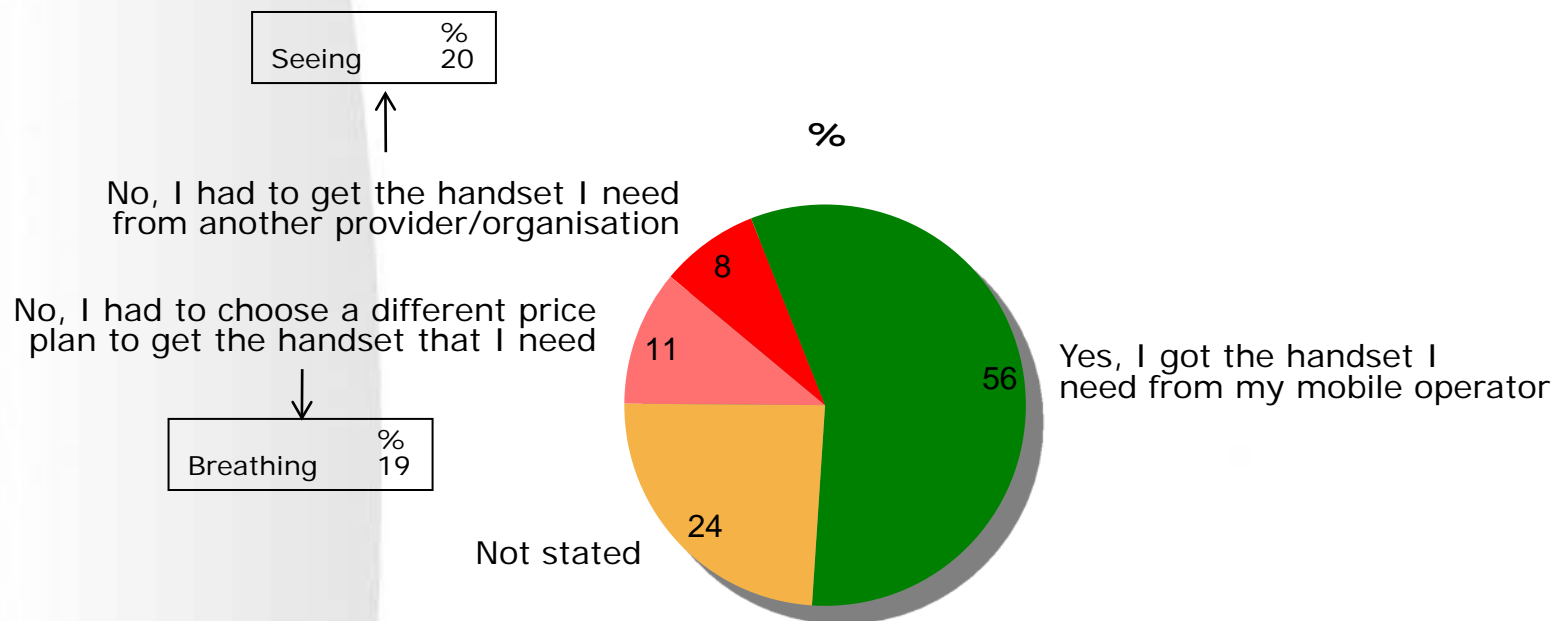


Intellectual/Learning 34%

2 in 10 were not able to get an accessible handset with the price plan they wanted



Q. Were you able to get an accessible handset with the price plan you want? **An accessible handset refers to a handset that contains features that meet your particular needs as a person with a disability**





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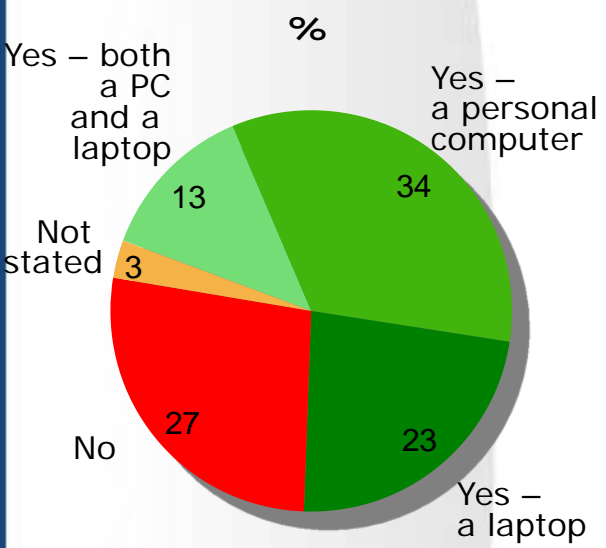
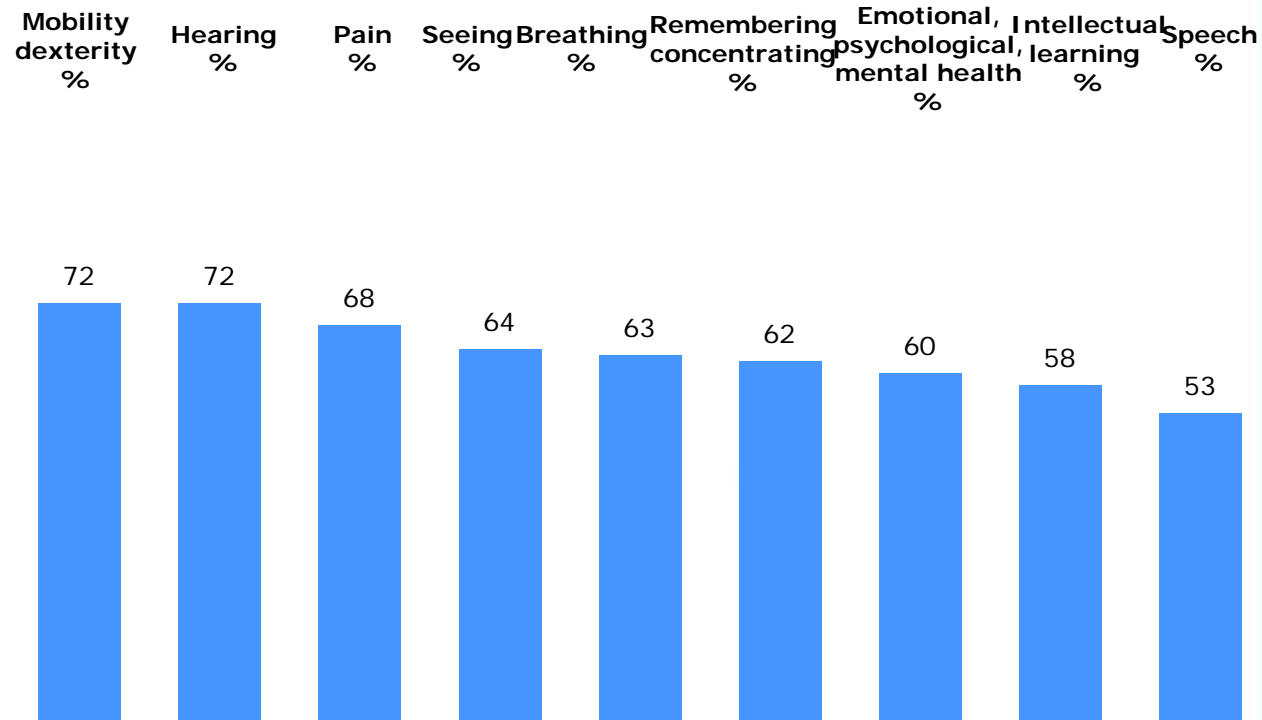
The Internet

Use of PCs and laptops among people with disabilities



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

Yes any PC or Laptop



Total PC or Laptop ownership = 70%
(2007: 29%)

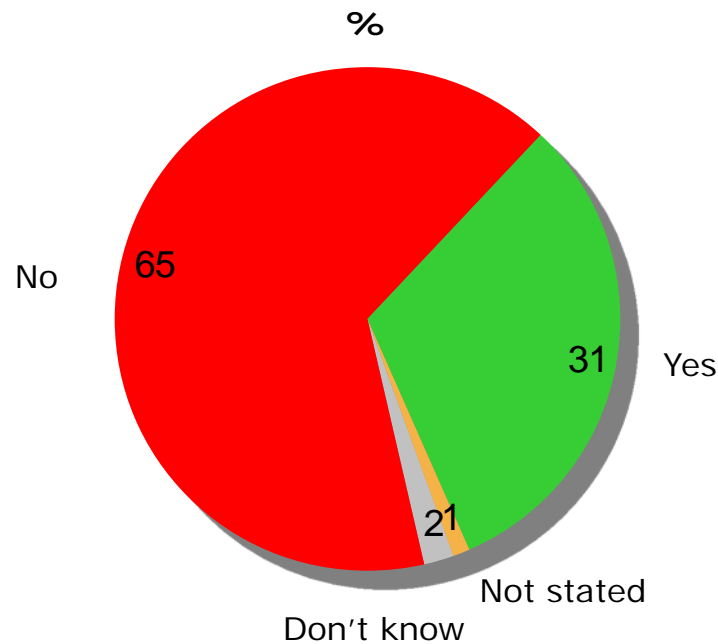
Total PC or Laptop all adults = 85%

PC/laptop ownership is lower among those people who live alone (57%), than among all people with disabilities.



Nearly a third of users with disabilities have purchased their PC or Laptop in the last 12 months

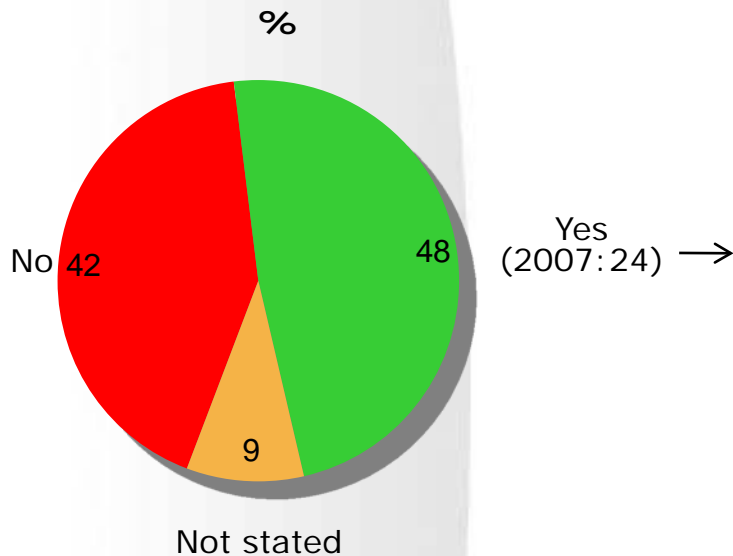
Q. Have you purchased this home Personal Computer (PC) or laptop in the last 12 months?



Use of internet from any location has doubled since 2007 among users with disabilities



Q. Do you personally use the Internet from any location?



Note: 72% of all adults use the internet from any location

	2010 %	2007 %	All Adults %
Home	85	72	89
Work	32	28	25
Friend's house	17	11	6
On the move using portable equipment	16	-	3
Public Library	15	5	3
Internet Cafes	13	5	2
Elsewhere	9	-	1
School/college	8	19	12
Not stated	2	-	-

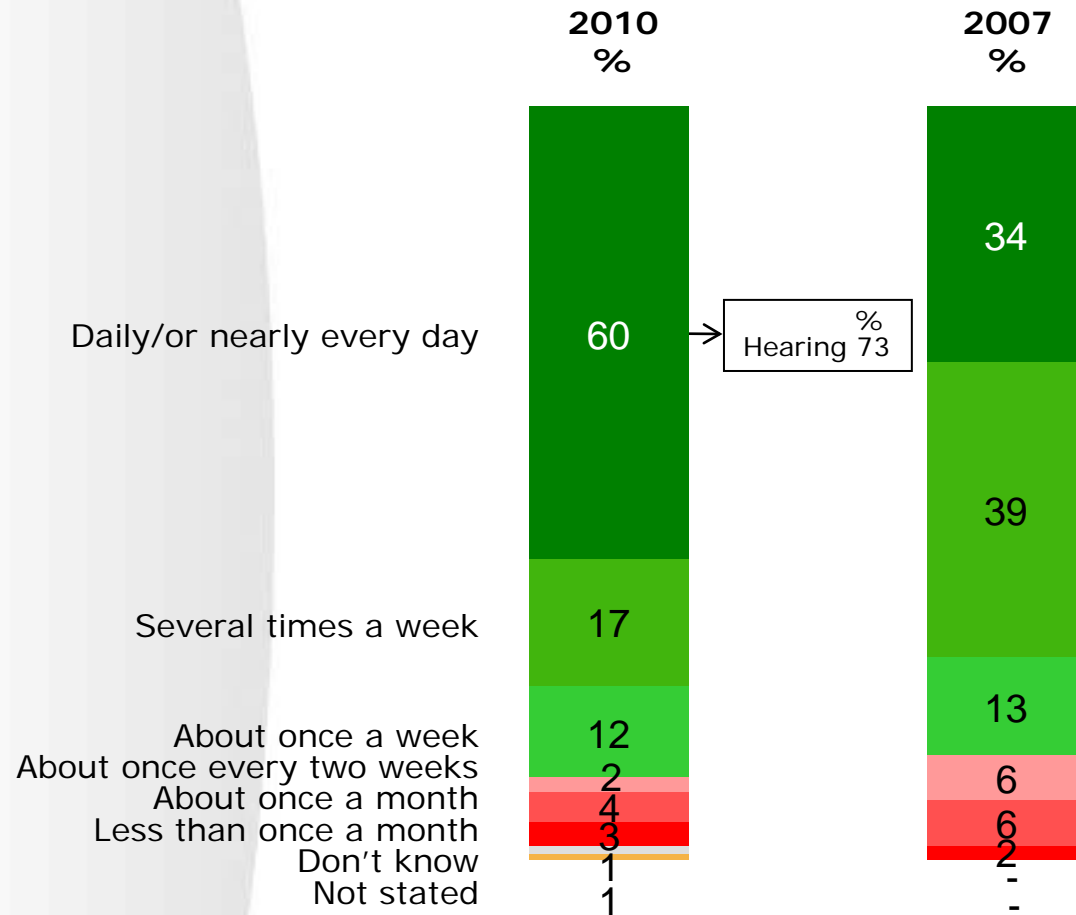
Base: All respondents (n=314)

Base: Use internet (n=152)

Frequency of internet use has increased, with 6 in 10 users saying they use the internet daily or nearly every day



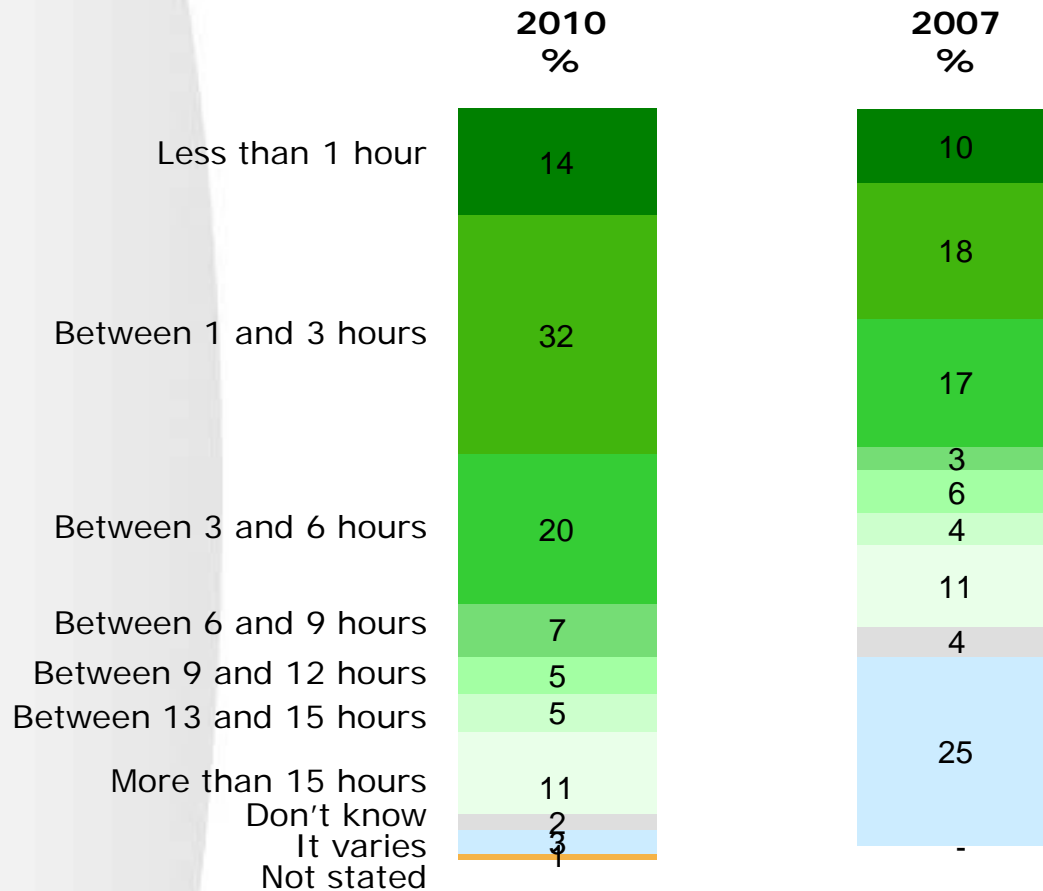
Q. How often do you use the internet from any location?



The length of time spent online per week has changed little over the last 3 years



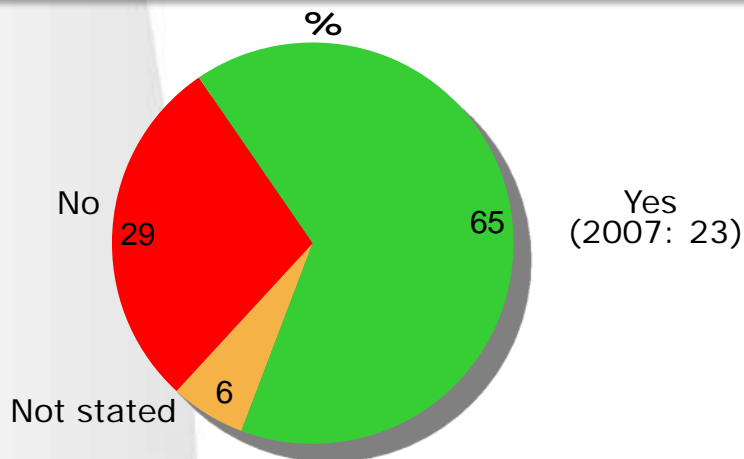
Q. In an average week can you estimate how much time in hours you spend using the internet from any location?



Home internet access among users with disabilities is in line with the overall population

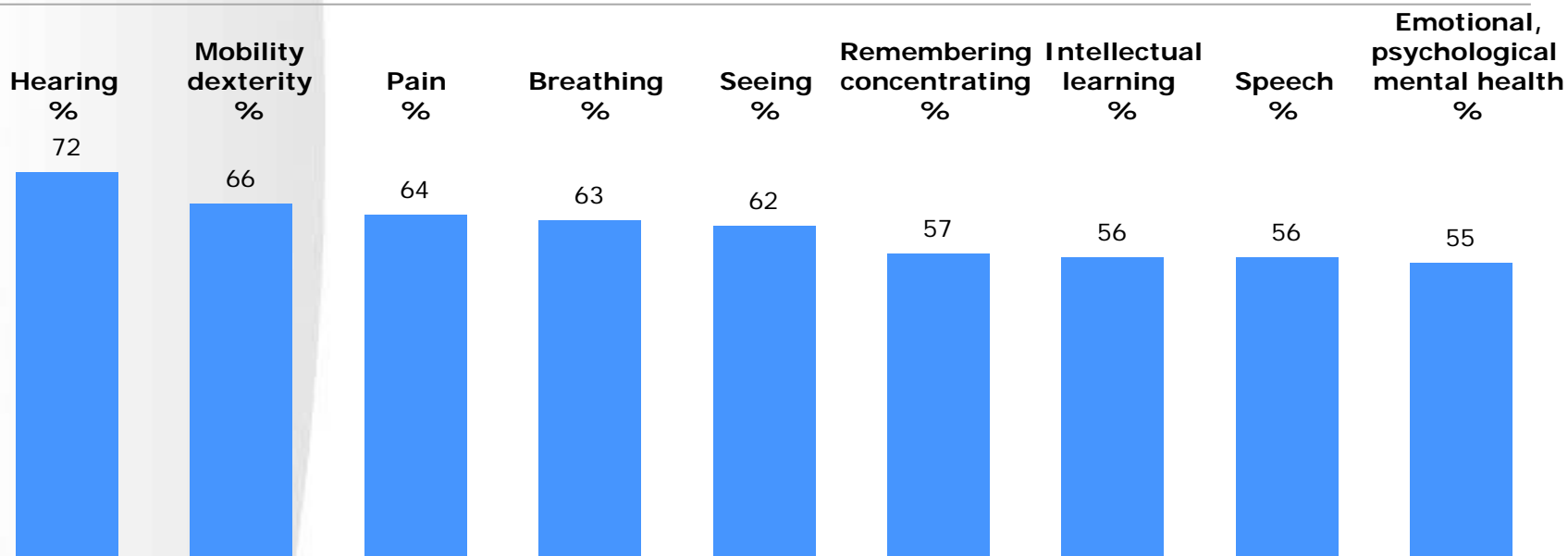


Q. Do you have an Internet connection/Internet access in your home?



Note: 66% of all adults have internet access at home

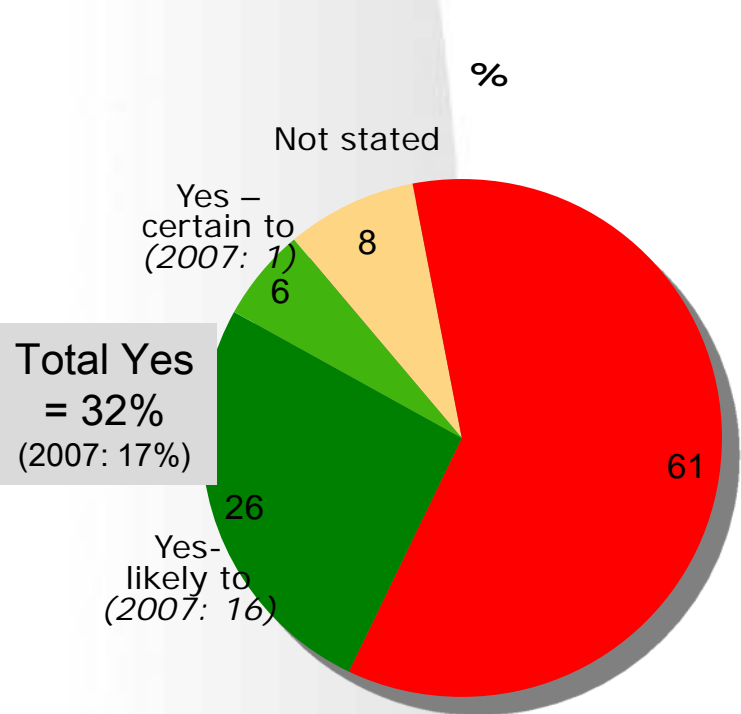
Home internet access is lower among those people who live alone (45%), than among all people with disabilities.



Almost one third with no home connection intend to get home internet connection in the future

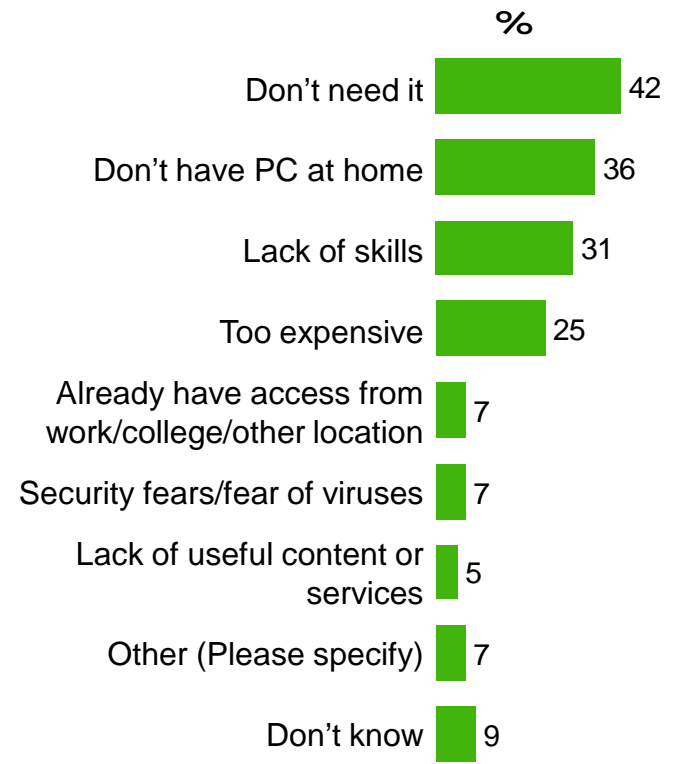


- Q. If you do not have an Internet connection in your home, do you intend to get the Internet at home in the future?
- Q. If you are **not likely** to get an Internet connection in your home, why do you say you won't get the Internet at home?



Total Yes = 32% (2007: 17%)

No (2007: 83) →



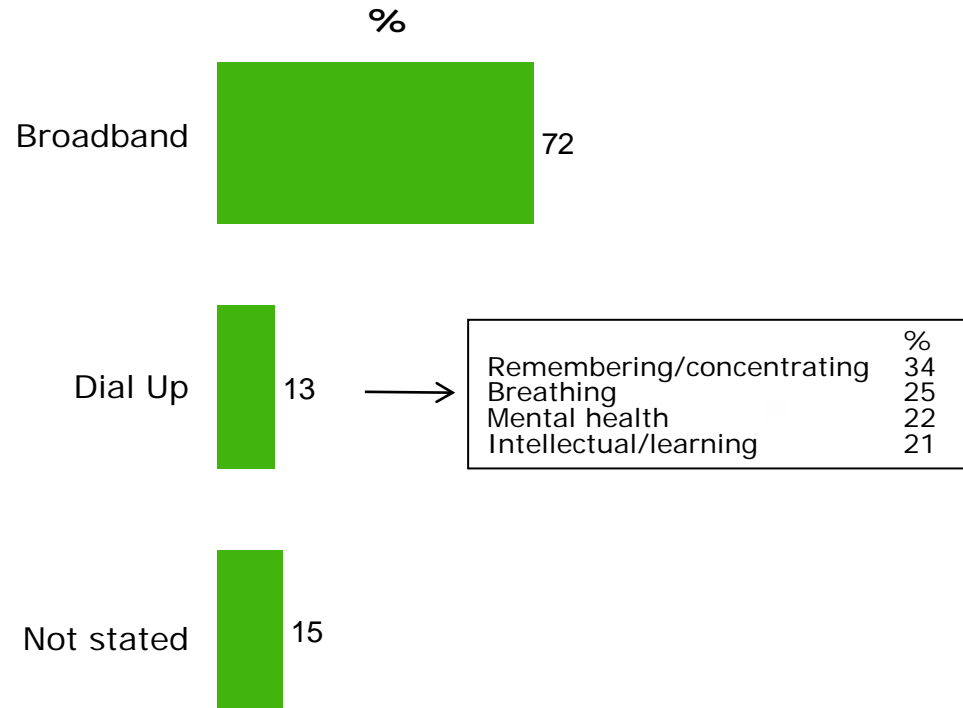
Base: All without internet at home (n=90)

Base: Unlikely to get internet (n=55)

Three quarters of those with a home internet connection claim to use broadband



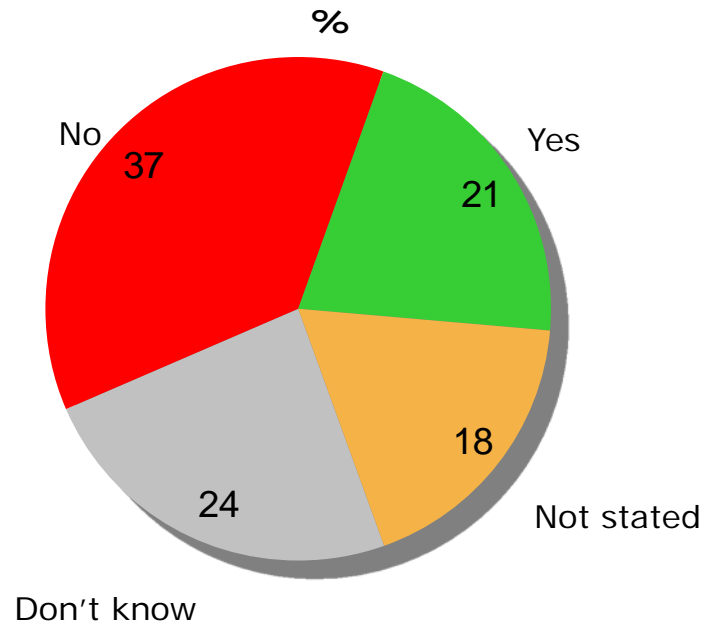
Q. How do you connect to the internet from home?



Two in ten use their internet connection on the move



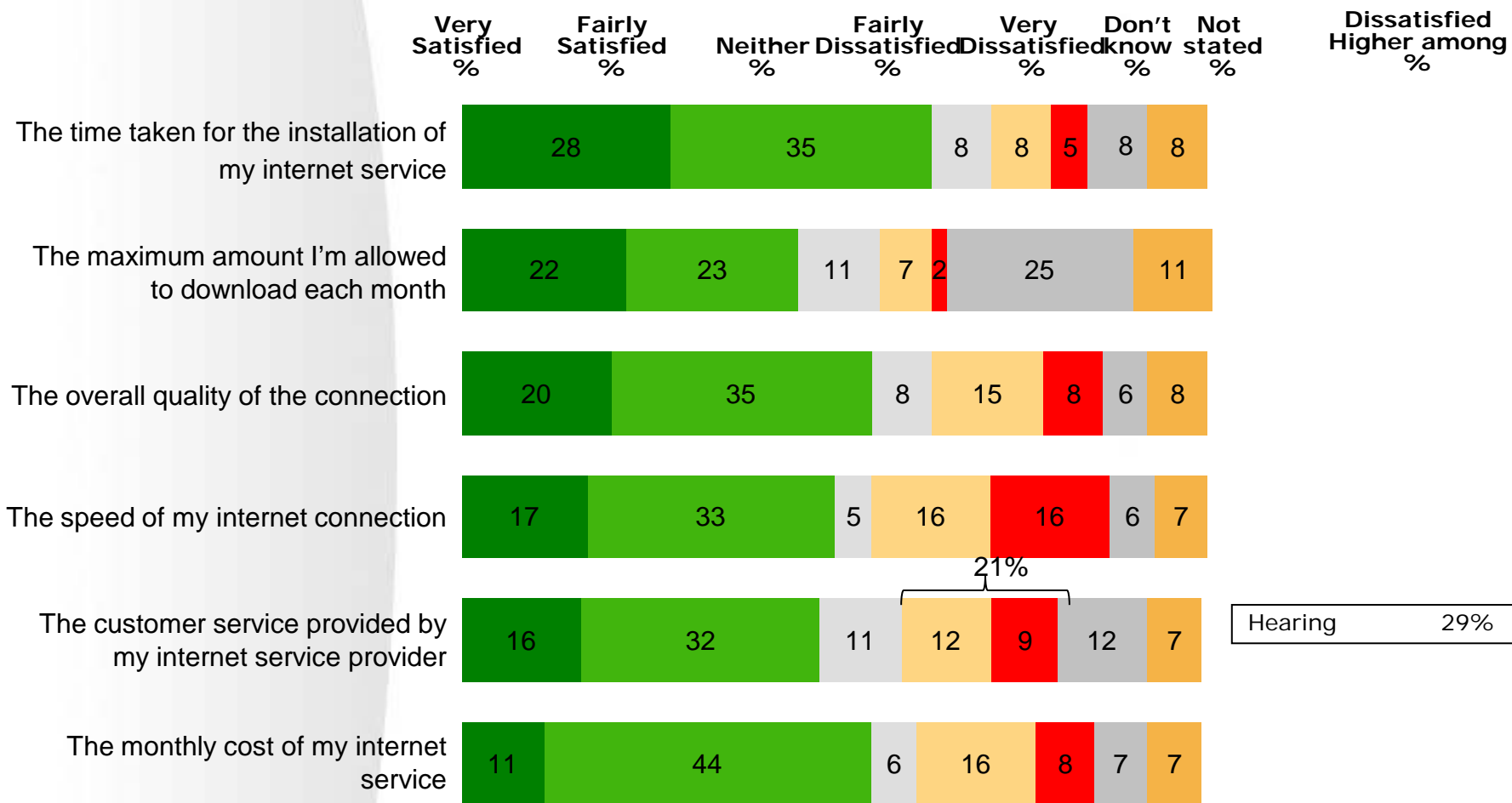
Q. Thinking about the current internet connection you are using, are you able to use this internet connection via your laptop when you are out and about i.e. not at home?



Satisfaction with various elements of internet service



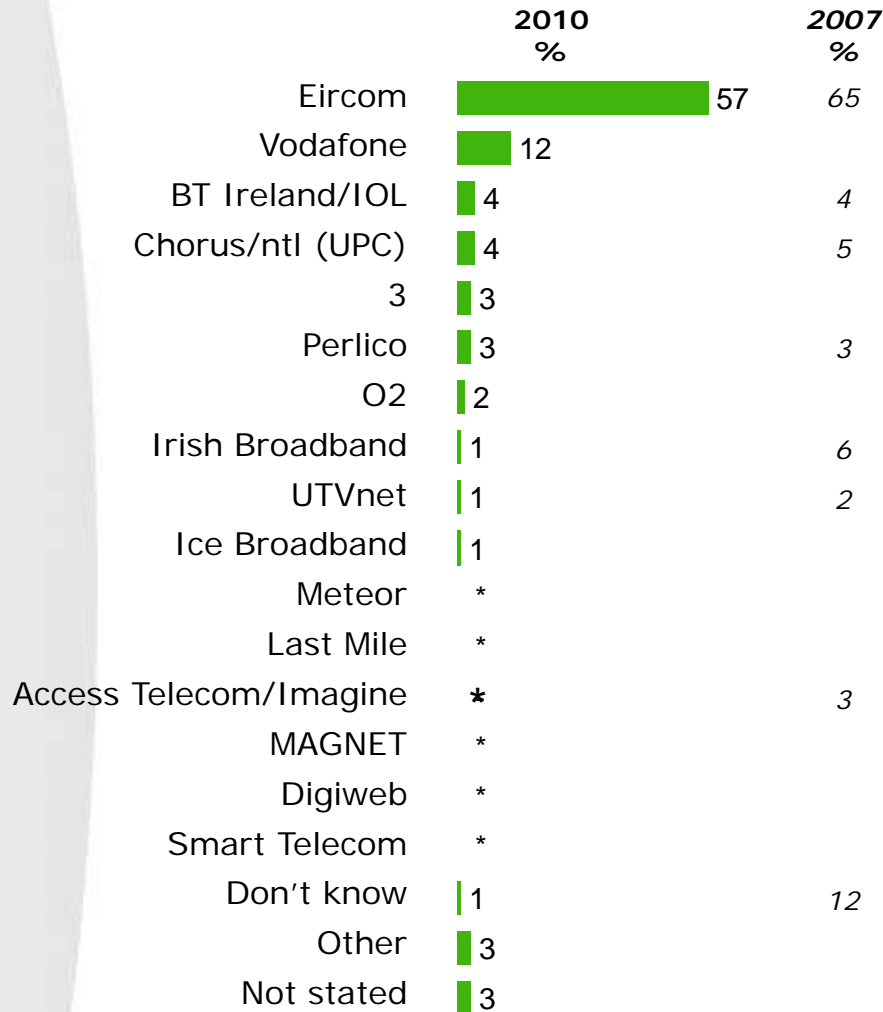
Q. On a scale of 1-5 were 1 indicates very dissatisfied, and 5 indicates very satisfied, please rate your experience of the following aspects of your internet service?



Eircom remains main ISP used by people with disabilities



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



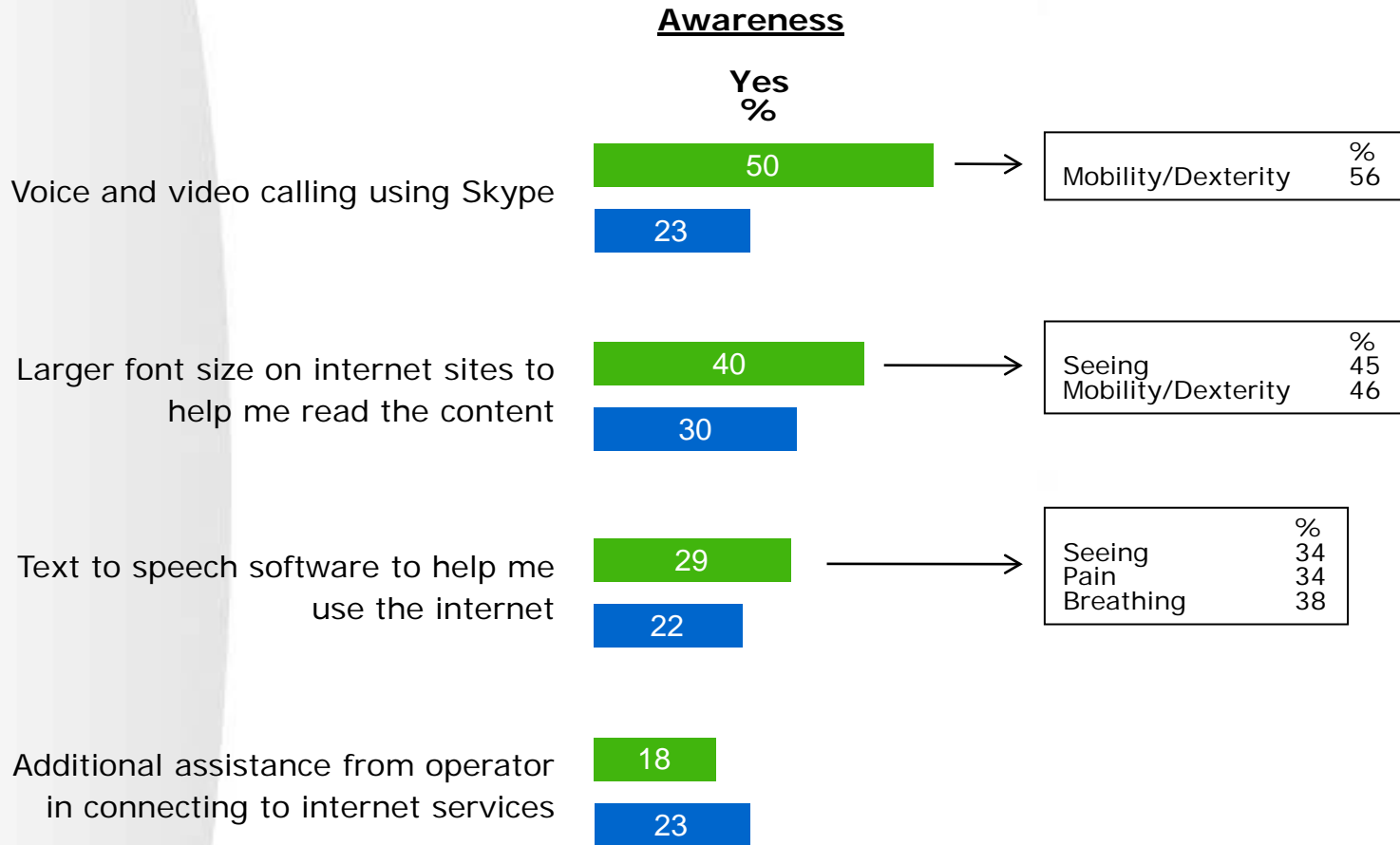
Note: 43% of all adults use Eircom as their ISP



Awareness of accessible internet services

Q. Are you **aware** of the following Internet services which are aimed at making using the Internet more accessible to users with disabilities?

2010
2007



Use of accessible internet services

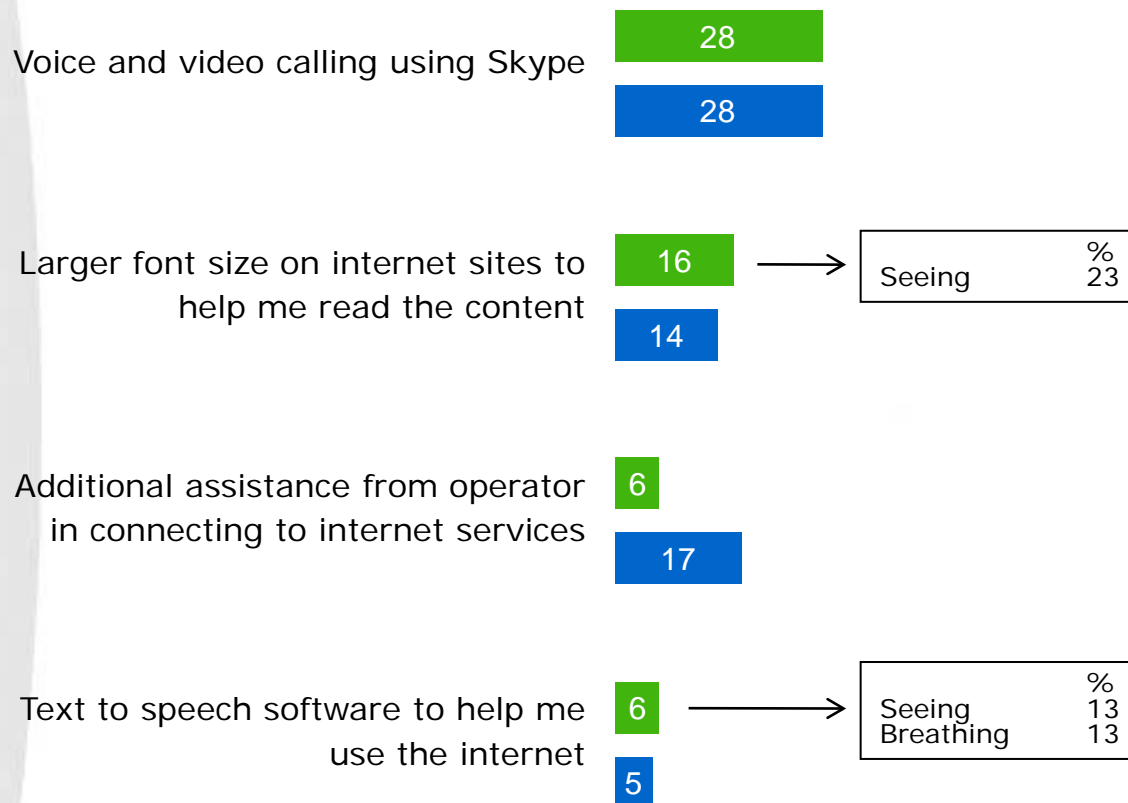


Q. Do you **use** any of these services?

2010
2007

Usage

Yes
%





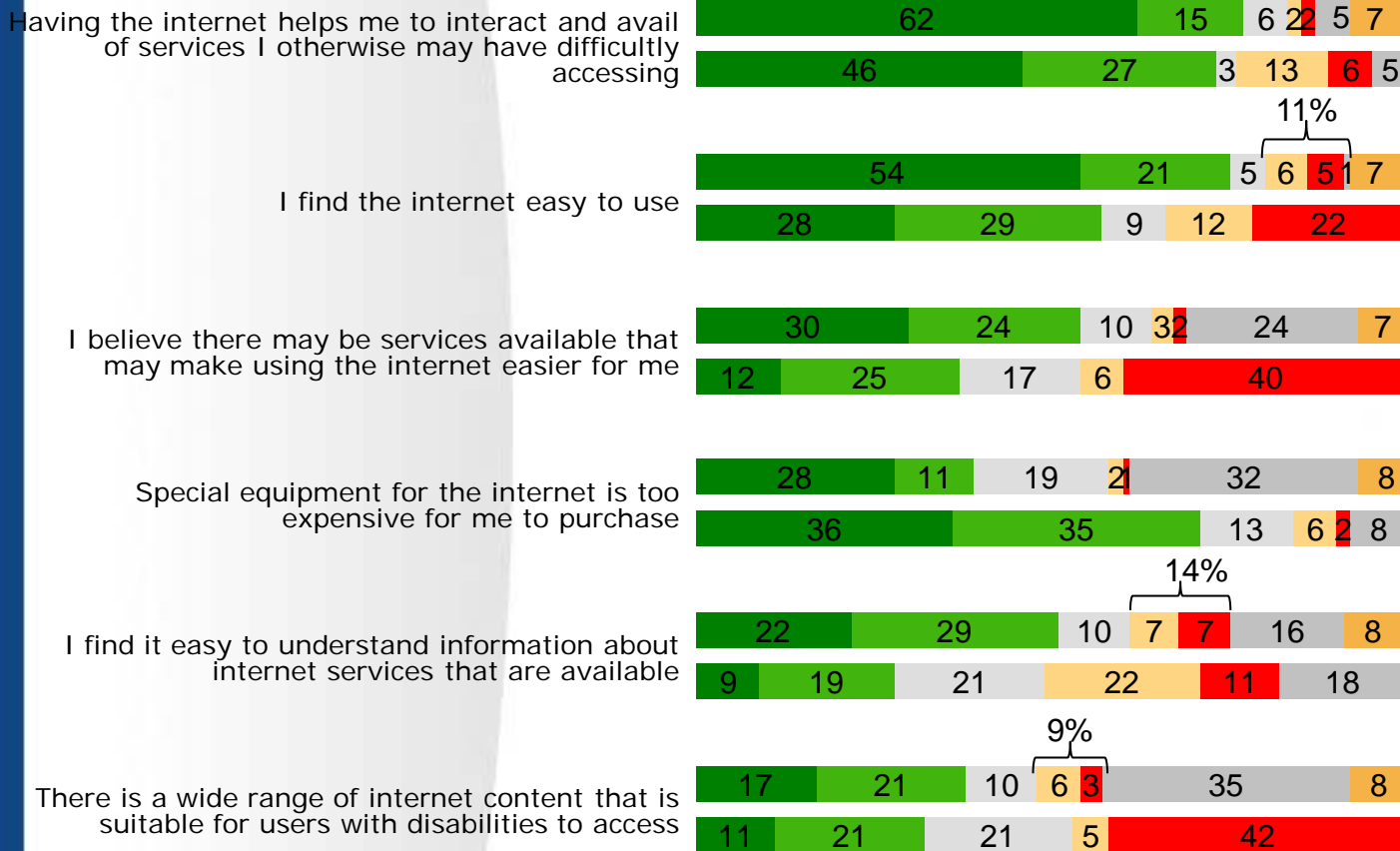
Strong agreement that the internet enables use of services that may otherwise be difficult to access

Q. Please rate the following statements based on a scale of 1-5 where 1 means strongly disagree, and 5 means strongly agree.

2010
2007

Strongly Agree % Agree % Neither % Disagree % Strongly Disagree % Don't know % Not stated %

Disagree Higher among %



Remembering/
Concentrating
Emotional/
Psychological 24%
25%

Seeing 25%

Hearing 14%



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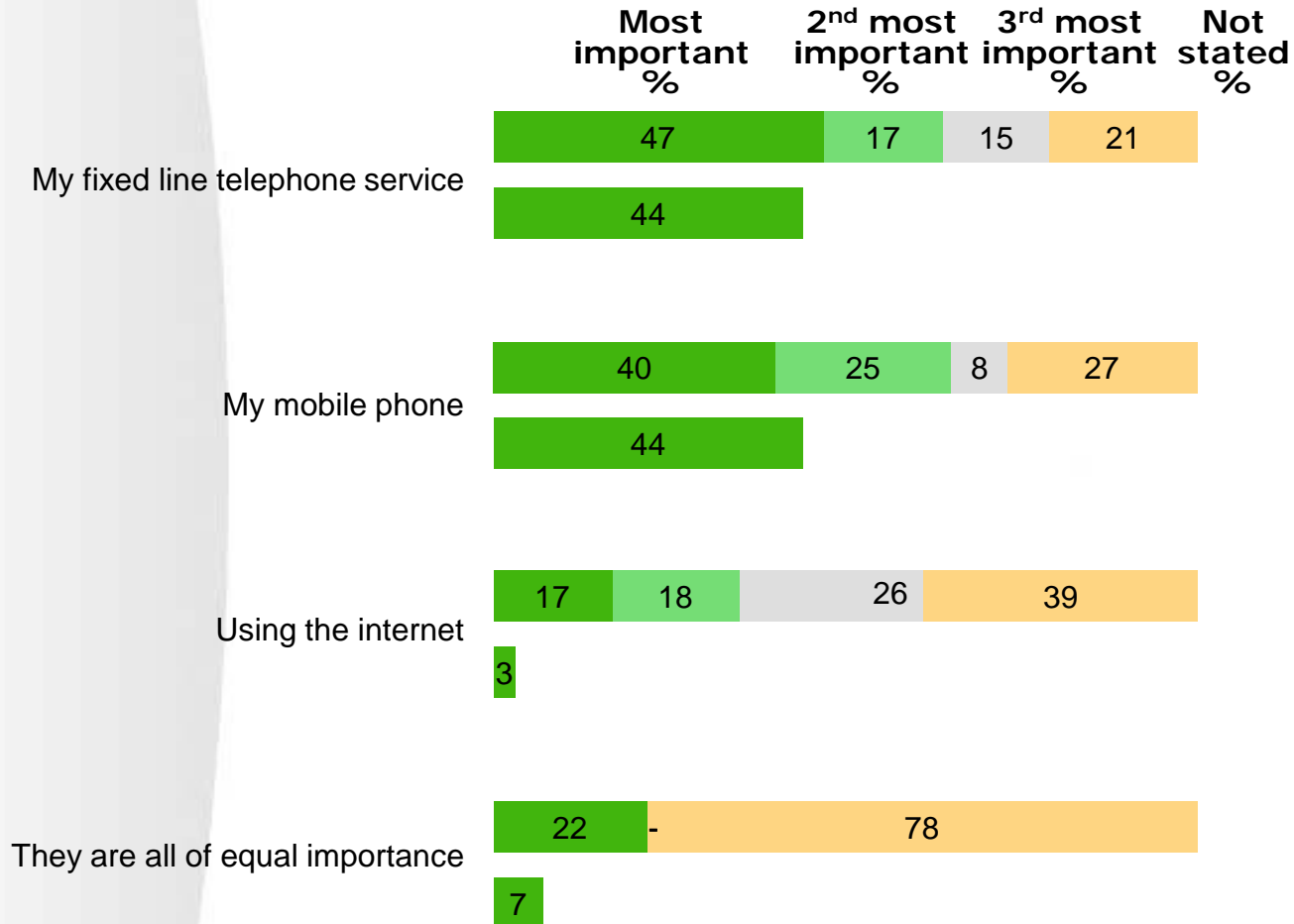
General Telecommunications Services

Importance of different ICT services to users with disabilities



Q. Please rank the following services in order of their importance in meeting your communications needs, which is...

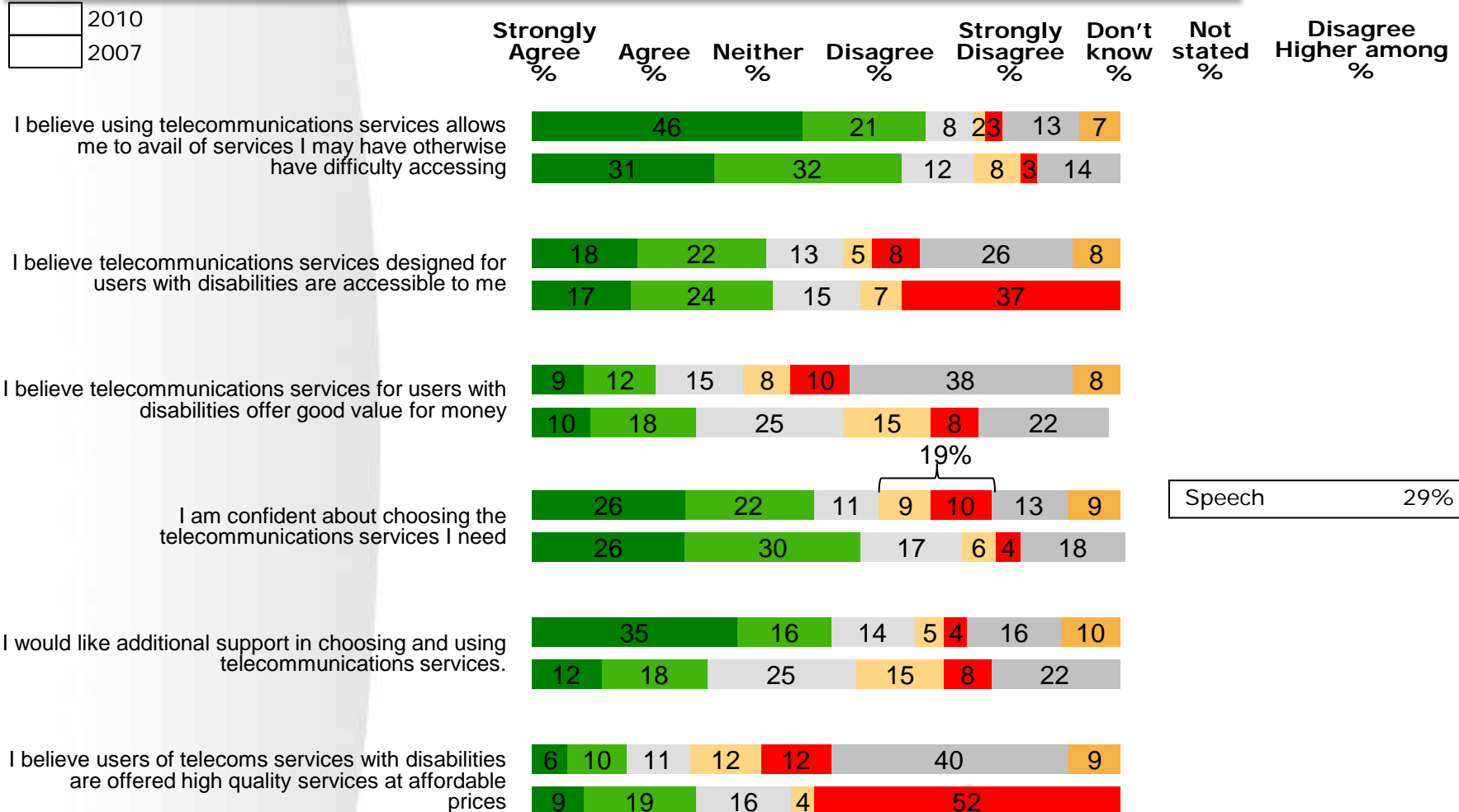
2010
2007





There is strong agreement that telecoms services allow users to make use of services that they may otherwise have difficulty accessing

Q. Please rate the following statements based on a scale of 1-5 where 1 means strongly disagree, and 5 means strongly agree.



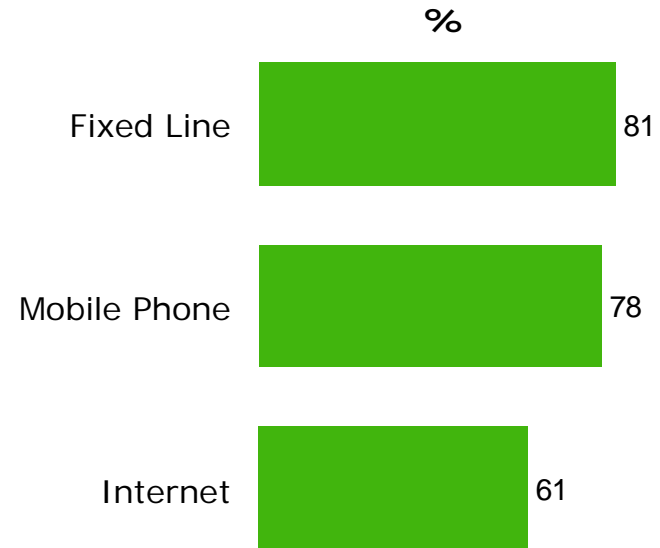
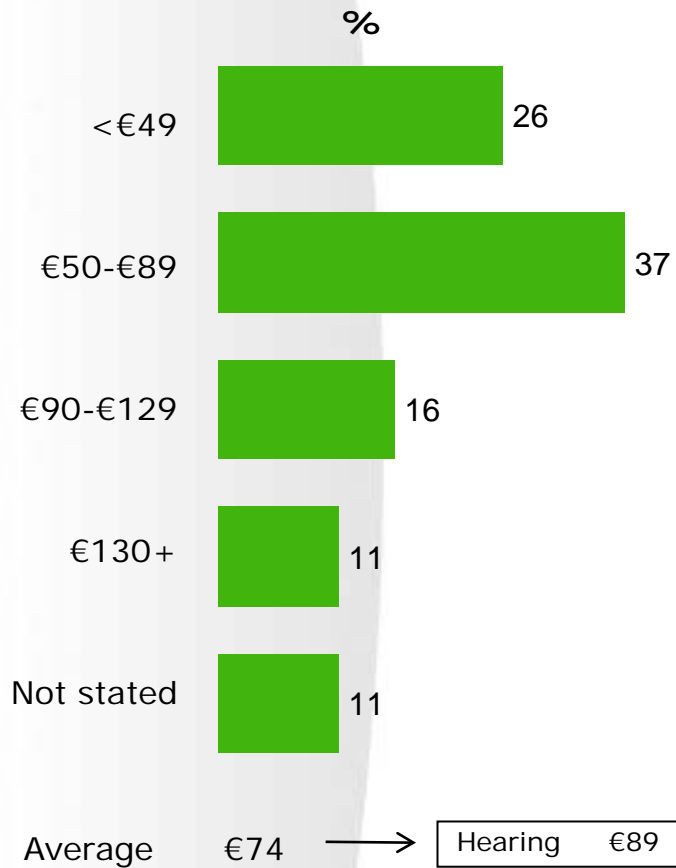
19%

Speech 29%

Average monthly spend on all telecommunications services is €74



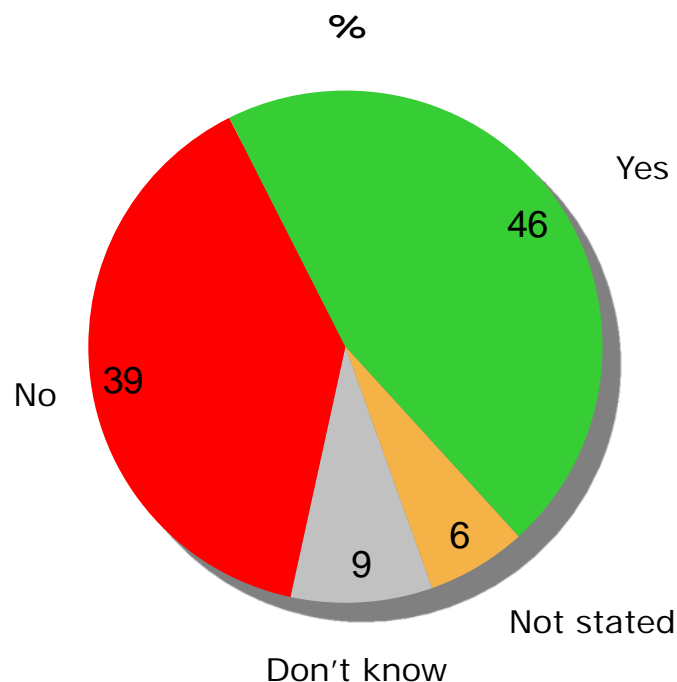
- Q. How much approximately did you spend last month on all your telecommunications services i.e. fixed line, mobile phone and Internet services, to the nearest euro?
- Q. Which of the following communications services are included in the amount you stated that you paid in the last month?



Instances of using a bundled package higher among users with disabilities than the wider population



Q. Do you subscribe to a **bundled package** from your service provider? A bundled package is where more than one service is provided by a single operator, often at a reduced cost to subscribing to the services separately e.g. Fixed line phone and internet connection

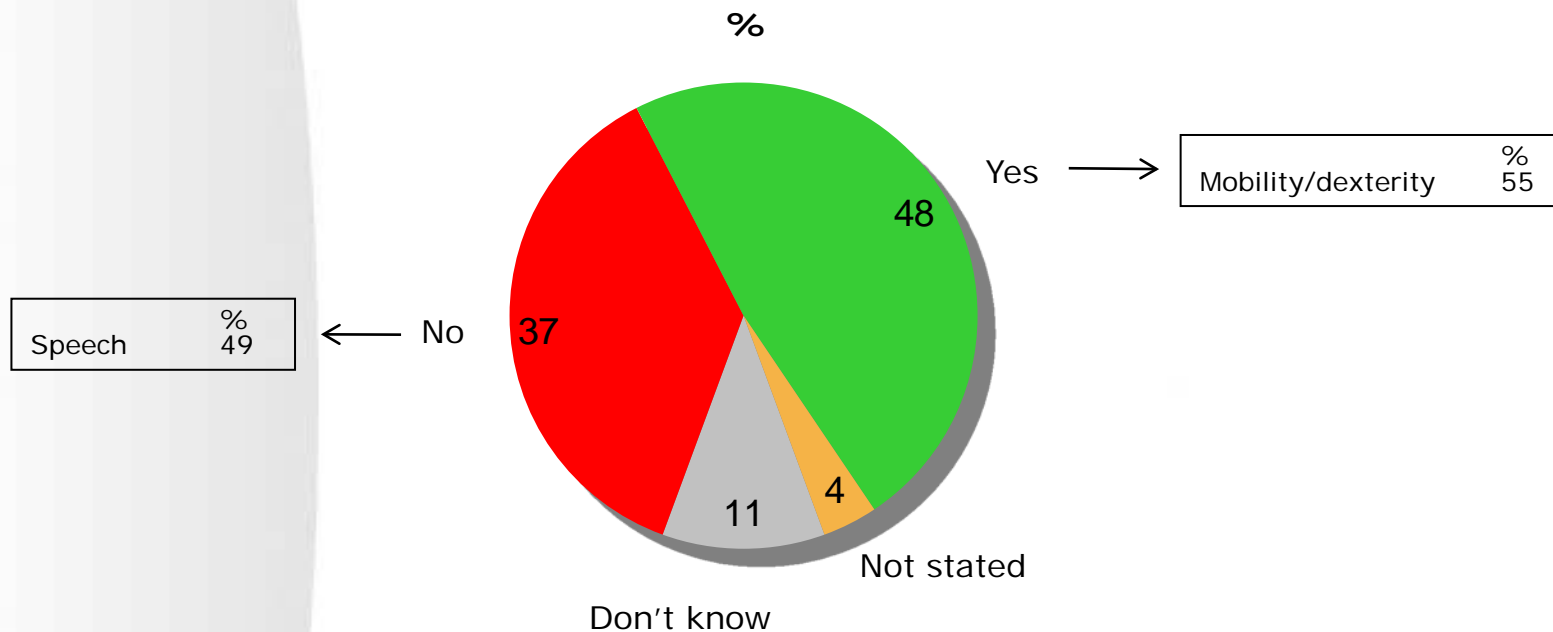


Note: 40% of all adults have a bundled package

Awareness of use of telecoms allowance towards fixed and mobile bills



Q. Are you aware that you can use your telecoms allowance from the Department of Family and Social Affairs* towards paying either your fixed or mobile bill?

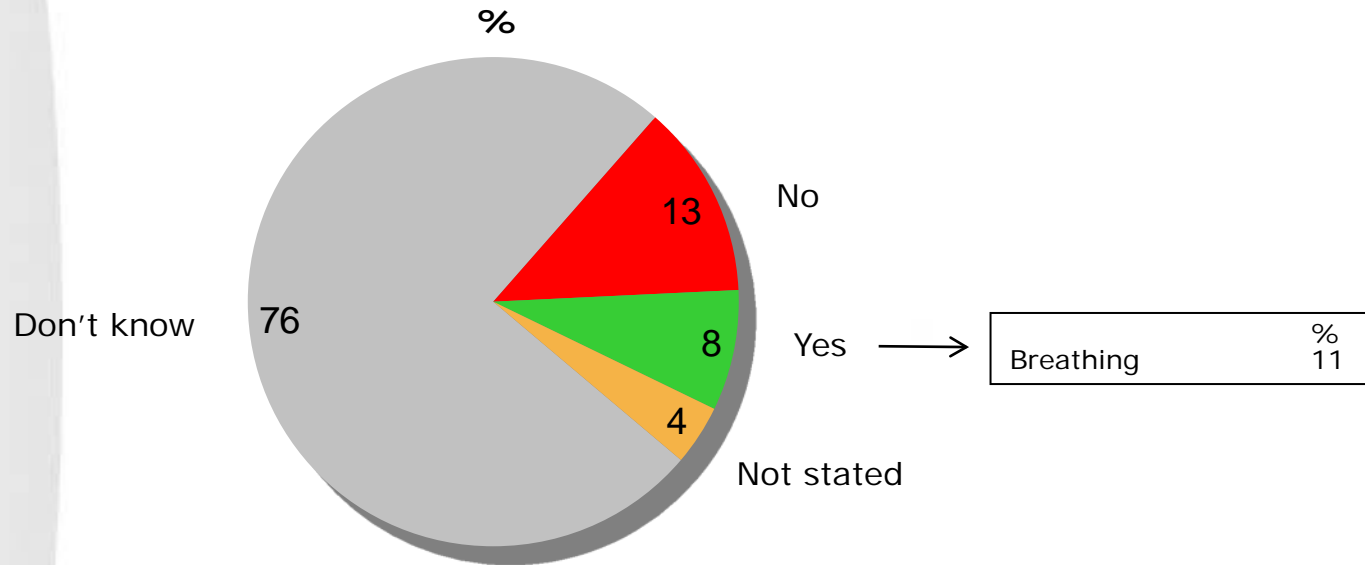


*Has since been renamed Department of Social Protection

Low awareness of whether or not service providers have a code of practice for dealing with consumers with disabilities



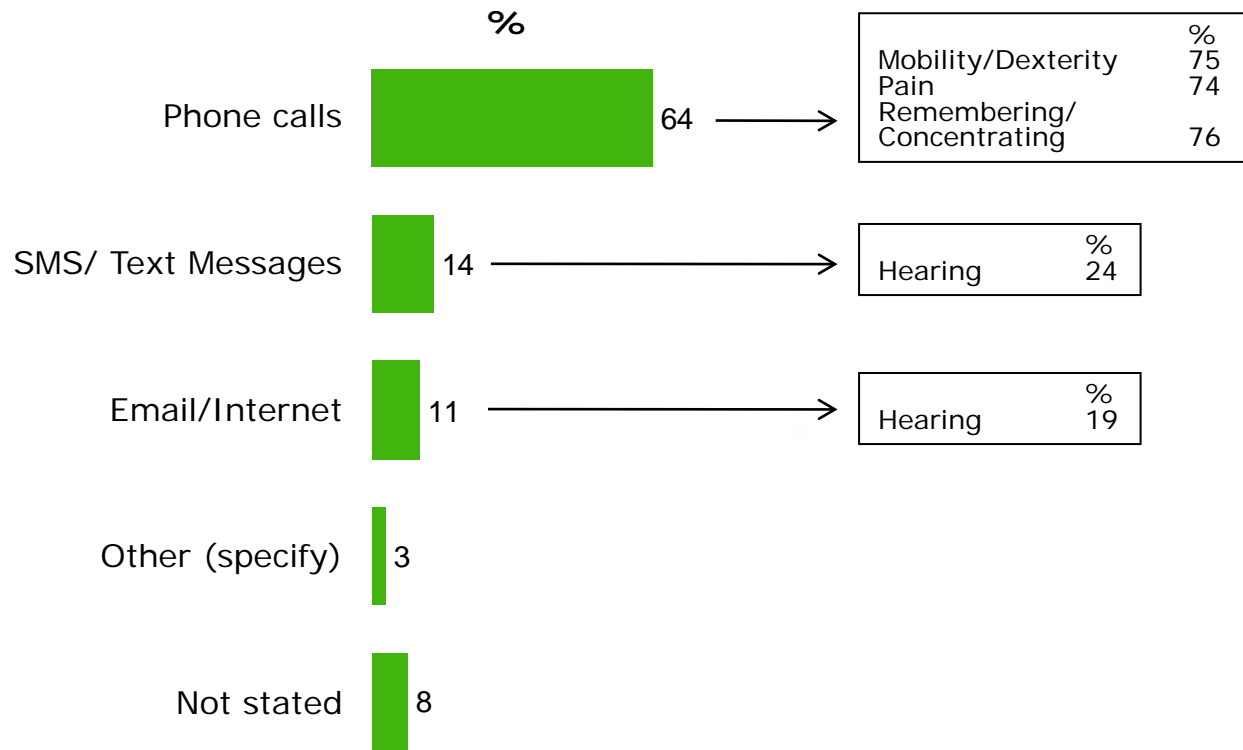
Q. Do any of your service providers have a code of practice for dealing with consumers with disabilities?



Phone calls is the preferred method of contact with communications service providers



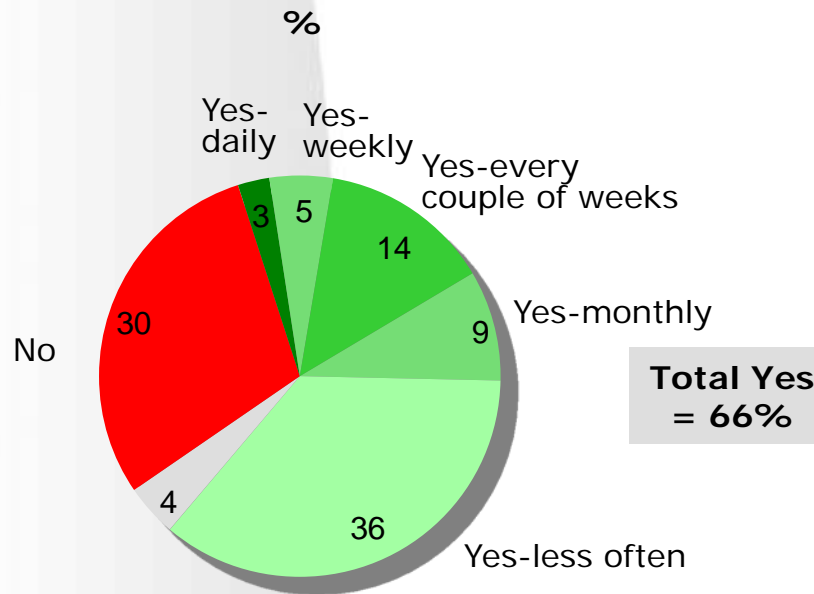
Q. What is your preferred method of contact with your communications services providers?



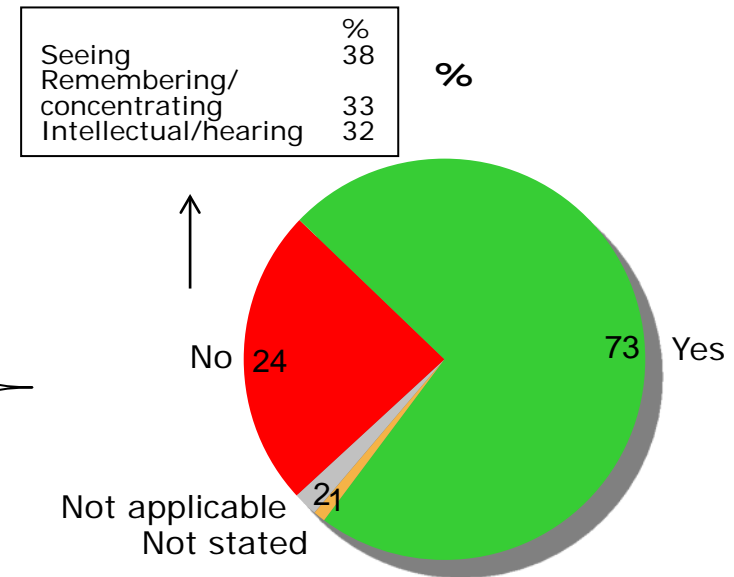


Use of the printed telephone directory

- Q. Do you use the printed telephone directory (not the Golden Pages)?
- Q. **When you use the printed telephone directory** (not the Golden Pages) do you find it easy to read the listings?



Base: All respondents (n=314)

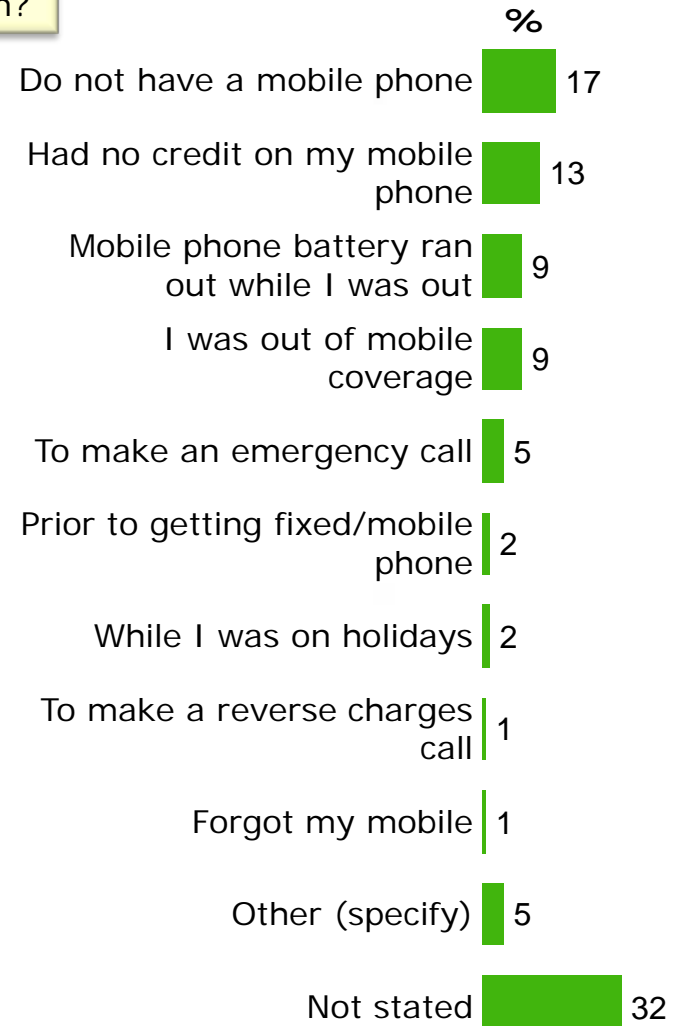
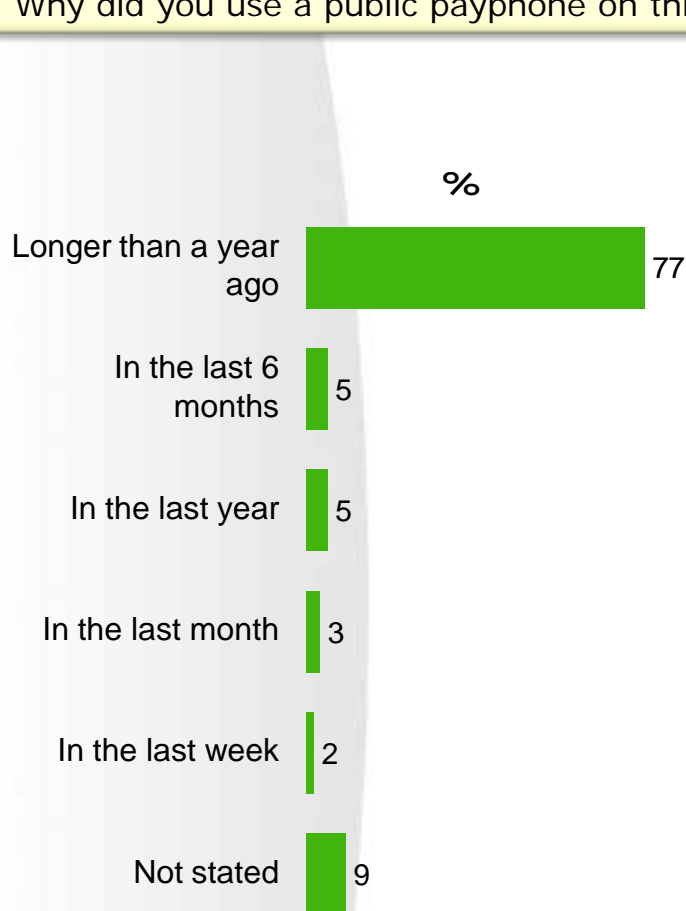


Base: All users (n=209)



Use of public payphones

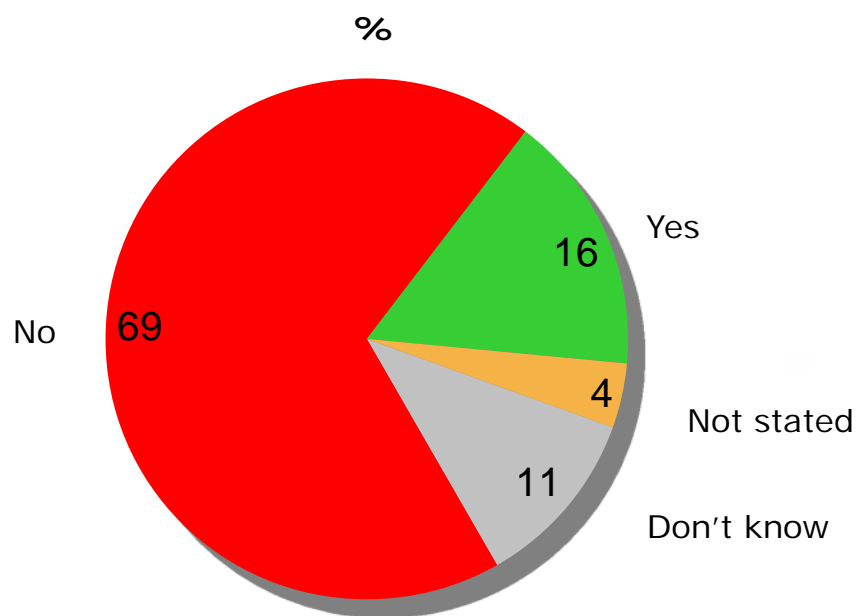
- Q. When was the last time you used a public payphone?
Q. Why did you use a public payphone on this occasion?



Importance of public payphones



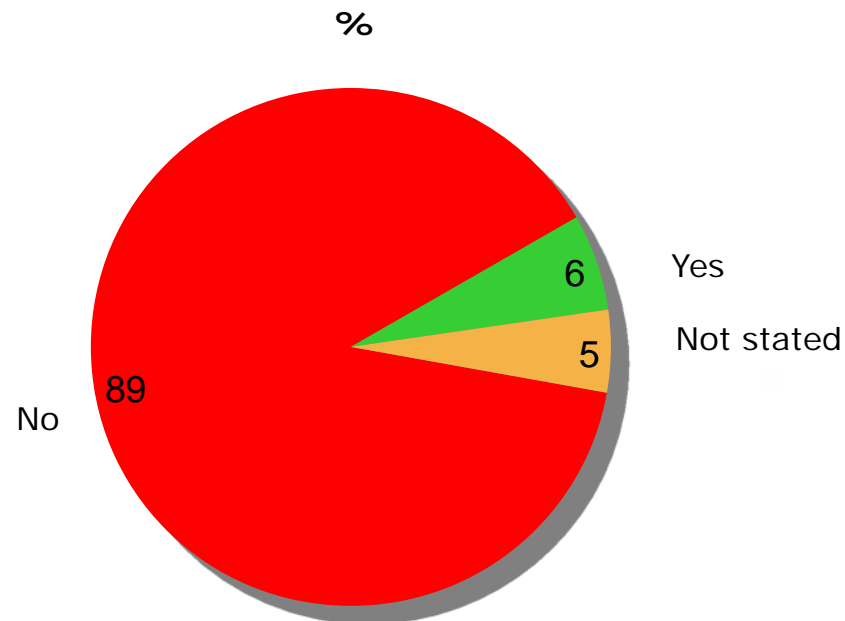
Q. Are public Payphones important for your needs?



Use of callcosts.ie is low



Q. Have you used ComReg's website www.callcosts.ie to compare the cost of mobile, fixed and broadband phone packages?





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Summary



FIXED LINE MARKET

- Nearly 9 in 10 consumers with disabilities have a fixed line phone in their home; this is above the national average (from the Residential ICT Research) which showed nearly two thirds of all adults have a fixed line phone. Preference for fixed over mobile and ease of use are the main reasons for having a fixed line phone in the home. Eircom is the main provider used for fixed line services among users with disabilities.
- Of the small number without a fixed line phone the reasons for not having one are mainly due to having a mobile phone, and to a lesser extent the cost of fixed line calls, connection and line rental.
- Half of fixed line users with disabilities have shopped around to compare prices between fixed line operators, and a marginally lower number have actually switched their fixed line provider. However, over half of those who have ever switched, switched back to their previous provider.
- In addition, those who switched back to their original provider appear to have been disappointed with the experience in terms of costs and service, which encouraged the return to their original provider.
- Of those who have not shopped around for a new fixed line supplier, satisfaction with current service provider is the main reason for not doing so.
- When selecting a home fixed line provider price and customer service are the most important considerations for users with disabilities; the operator having a good reputation is also considered quite important.
- While satisfaction levels are high with regard to installation, understanding and reading charges, and the level of customer support for fixed line services, there appear to be some issues with costs of line rental and international calls and most notably with the cost of calls to mobiles.
- Low levels of users with disabilities have approached their fixed line operator regarding special equipment or services which would make using their fixed line service easier; there are higher instances of users with seeing or hearing difficulties who have contacted their operator in this regard. While nearly 6 in 10 are satisfied with the response received from their operator, a sizeable 3 in 10 are not satisfied.

Summary II



- Over 8 in 10 agree that having a reliable fixed line service is vital; a similar number also agree that their fixed line service is easy to use. While there are high levels of perceptions of the ease of understanding and reading telephone bills, there appears to be issues around getting and understanding information around pricing, contract terms and services available for consumers with disabilities.

MOBILE MARKET

- 84% of users with disabilities have a mobile phone. This is lower than the population in general with 95% of all adults having a mobile phone. Of those with a mobile phone 8 in 10 have a pre-pay option, and nearly 6 in 10 use Vodafone for their mobile service.
- A third of mobile phone users say that they have a 3G mobile phone. Over 4 in 10 say that they only change their mobile phone handset less often than every two years which is likely to be impacting on the take-up of 3G handsets.
- About a third of mobile users say they don't make phone calls every day, with about half making between 1 and 5 calls in an average day. A similar 30% do not use their phones for SMS on a daily basis, with 4 in 10 sending between 1 and 5 per day. 13% send more than 10 SMS per day, with this figure rising to 23% among those with speech difficulties.
- 4 in 10 mobile phone users with disabilities have shopped around to compare prices between mobile operators, about half of these only once and the other half more than once.
- As evident in the fixed line market, price and customer service are the two most important considerations for users of mobile services when choosing a supplier. In addition, nearly half say the operator's network providing good coverage is also an important consideration.
- Awareness of mobile services or features to make the mobile phone more accessible to users with disabilities is highest for SMS and MMS, and using the internet over mobile phone.
- Only 1 in 10 mobile users with disabilities have contacted their operator regarding special equipment or services which would make the mobile phone easier to use. For those who did though, there were high levels very dissatisfied with the response of the mobile operator to the request.

Summary III

- The vast majority of mobile phone users with disabilities say that having a reliable mobile phone service is vital to them; there is also very strong agreement that the mobile phone is easy to use. There appear to be some issues around reading and understanding information about mobile services that are available.

THE INTERNET

- 70% of consumers with disabilities own a PC or laptop, compared with 85% among all adults. Nearly half of consumers with disabilities use the internet from any location (versus 72% of all adults), the primary location being home.
- 6 in 10 of those accessing the internet from any location say that they do so on a daily or nearly daily basis. 46% of those using the internet say that use it for up to 3 hours a week with a further 1 in 5 claiming to use it between 3 and 6 hours a week. Just over 1 in 10 are heavy users claiming 15+ hours use per week.
- Two thirds of consumers with disabilities have a home internet connection, which is at the same level as the population in general. Those with hearing difficulties are more likely to have a home internet connection than all with disabilities in general (72% v 65%). Eircom is the main provider of home ISP connections
- A third of those without a home internet connection are likely to get a connection in future, however those who are unlikely to do so cite lack of need, lack of home PC and lack of skills as reasons for not intending to do so.
- Nearly three quarters of those with a home internet connection claim to have a broadband connection, while 1 in 5 say they can use their home internet connection while out and about.
- While there are high levels of satisfaction with the time taken for the installation of internet services, there appear to be issue with the speed, the overall quality and the monthly cost of internet services.
- Awareness of internet services which could make using the internet more accessible for users with disabilities are highest for voice and video calling (via Skype), and larger font sizes on internet sites to help read the content. Use of these services however remain low.



- There is strong agreement that the internet enables use of services that may otherwise be difficult to use, and also that the internet is easy to use.

GENERAL TELECOMMUNICATIONS SERVICES

- The mobile phone and the fixed line are of roughly equal importance to those with disabilities.
- Two thirds of those with disabilities agree that using telecoms services allow them to avail of services they may otherwise have difficulties accessing. However there is some lack of awareness when it comes to knowing whether there are high quality offerings at affordable prices, and whether services for users with disabilities offer good value for money.
- On average, consumers with disabilities spend €74 a month on all their telecoms service.
- 46% of consumers with disabilities subscribe to a bundled package from their service provider, compared with 4 in 10 of all adults.
- Only half of consumers with disabilities are aware that they are able to use their telecoms allowance from the Department of Social Protection towards paying either their fixed or mobile bill.
- There is very low awareness of whether service providers have codes of practice in place for dealing with consumers with disabilities.
- Two thirds of telecoms consumers with disabilities use the printed telephone directory, however frequency of use is quite low. One quarter of those who do use the printed directory find the listings difficult to read.
- While most consumers with disabilities had used a public payphone in the past, over three quarters had last used one longer than a year ago. The main reasons given for ever having used a public payphone are to do with not having a mobile phone, having run out of credit or battery power, or being out of mobile coverage. Only 16% say that public payphones are important to their needs.
- Only 6% of those with disabilities have used ComReg's website www.callcosts.ie to compare the cost of mobile, fixed and broadband packages.



OVERALL

- Compared to the general population, consumers with disabilities are more dependent on fixed lines and marginally less likely to use mobile or the internet.
- Encouragingly, consumers with disabilities have shopped around for better prices for fixed and mobile services, and have switched provider.
- Price and customer service are the most important aspects when choosing both fixed and mobile services – probably no different to the general population.
- There is high agreement that fixed and mobile being reliable is vital, and there is also high agreement that all services (fixed, mobile and internet) are easy to use. There appear to be issues however around getting and understanding information about the different services.
- There is clearly a need specifically for increasing awareness of access to (and funding of) special equipment and services for people with disabilities, and a need for more information generally about the various ICT services on offer.
- The incidence of approaching operators for special equipment or services to make fixed and mobile services easy to use is very low, and there is high dissatisfaction among those who did make contact for this purpose.



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Thank You

For further information please contact:

Carol Fanagan **or** Suzanne Behan

Phone: (01) 297 4500

carol.fanagan@millwardbrownlansdowne.ie

suzanne.behan@millwardbrownlansdowne.ie