



An Coimisiún um
Rialáil Cumarsáide
Commission for
Communications Regulation

Impact of Covid-19 on Consumer Use and Perception of Telecommunication Services

June 2020

ComReg 20/61



RESEARCH
& INSIGHT



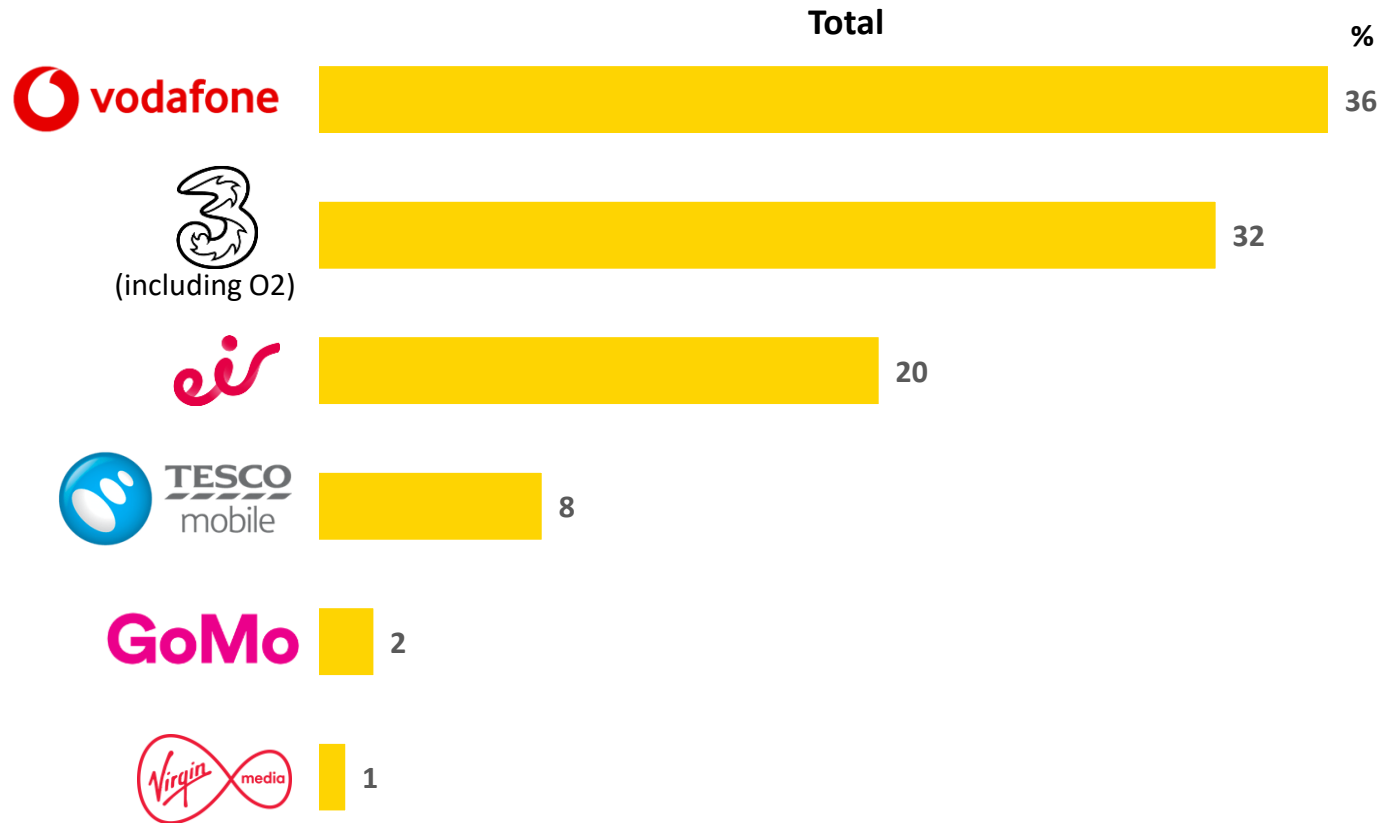
Methodology

- The questionnaire was included on one wave of the Behaviour & Attitudes online barometer survey. This survey is administered online to a sample of 1,004 adults aged 16+ on one wave of the Behaviour & Attitudes omnibus series.
- The sample is quota controlled by gender, age, social class and region to match the known demographics of the population (CSO estimates).
- Online fieldwork on the project was undertaken between 11th – 24th June, 2020.



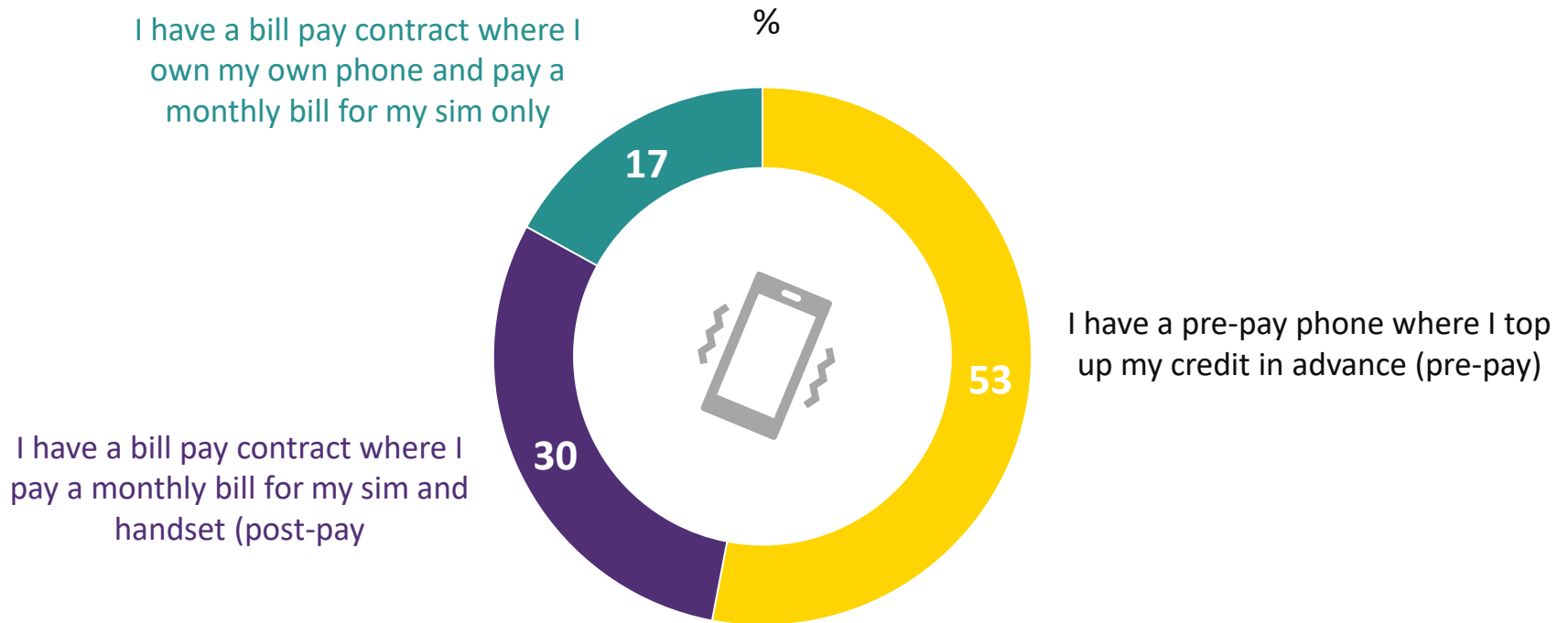
Main mobile operator

Base: All have mobile - 999



Payment method for mobile phone calls

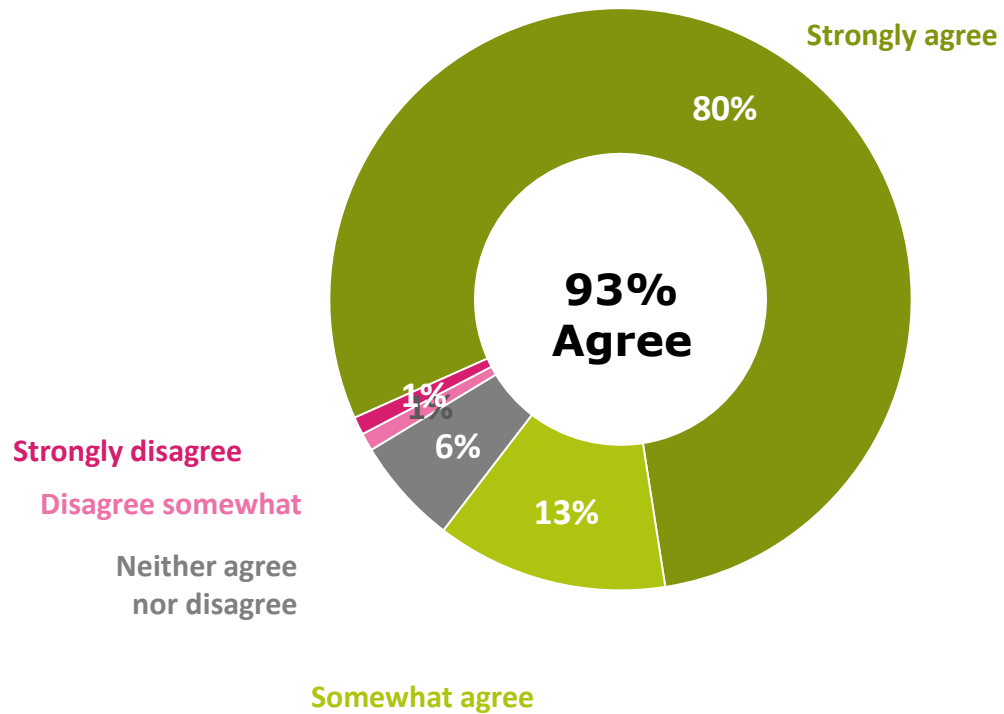
Base: All have mobile - 999



About half now have a prepay/credit mobile.

93% value being able to access and use broadband while at home during the ongoing Covid-19 pandemic

Base: All adults 16+ 1004



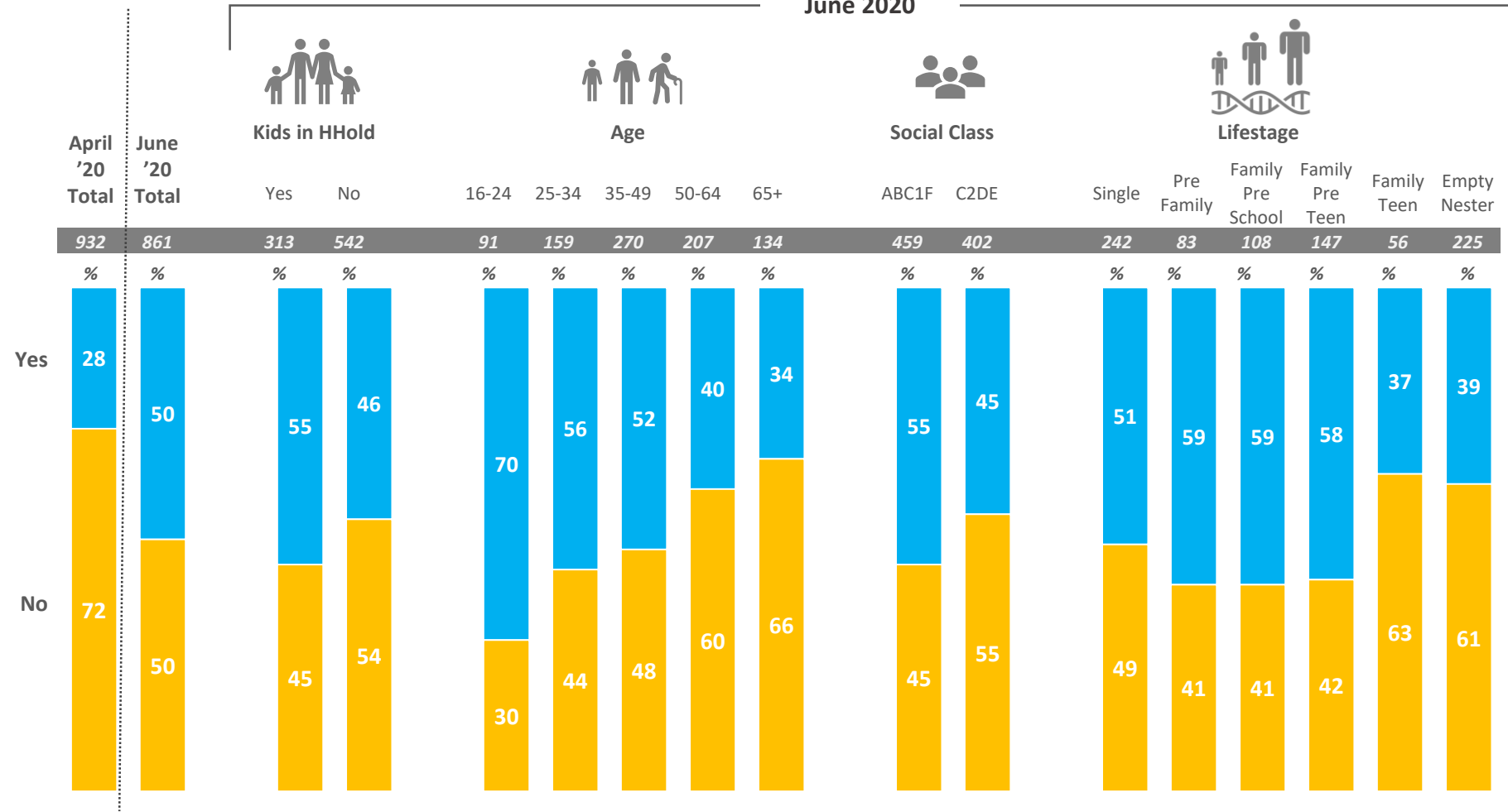
Q.20 To what extent do you agree or disagree with the following statement: "I value being able to access and use broadband while at home during the ongoing Covid-19 pandemic"?



Half would be willing to spend more on broadband service to get a better service - the Covid experience appears to have increased reliance on BB

Base: All with home broadband 861

June 2020



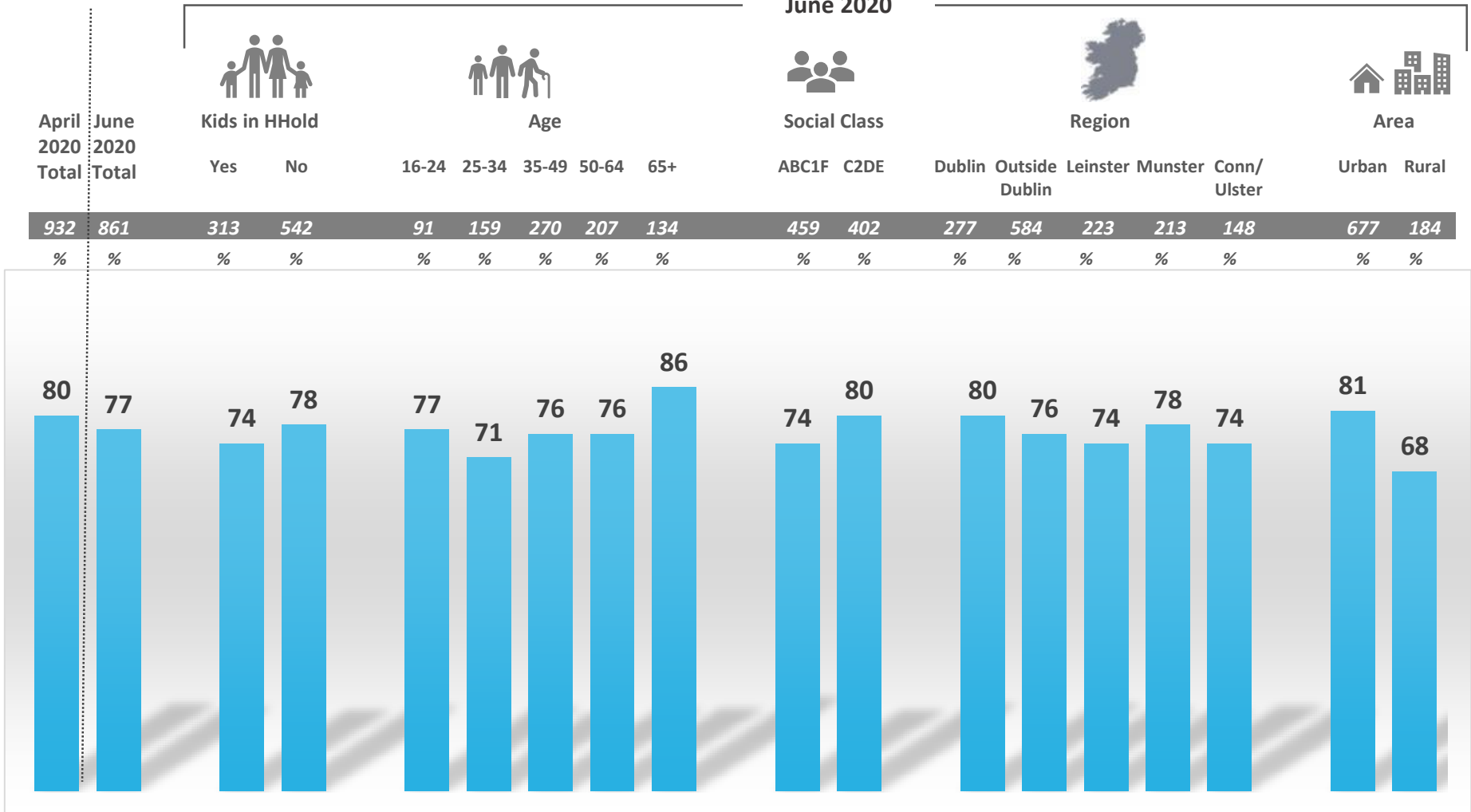
April Wording: Q.32 Would you be willing to spend more each month on broadband to get a better (faster, more reliable) service?

6 June Wording: Q.21 Would you spend more to get better home broadband for your household?

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

Base: All have broadband 861

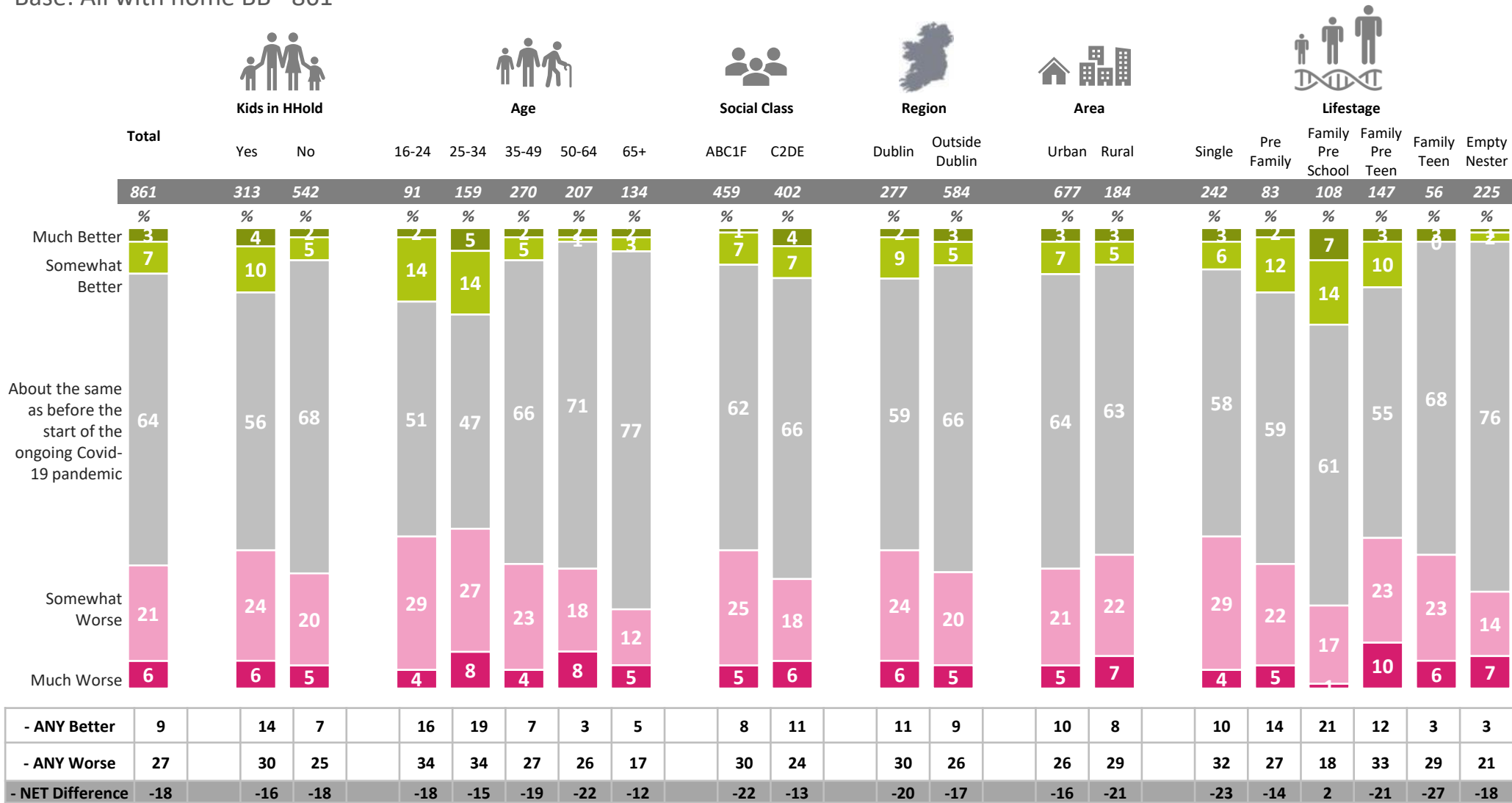
June 2020



Opinion of Home Broadband since the start of the ongoing Covid-19 pandemic

June 2020

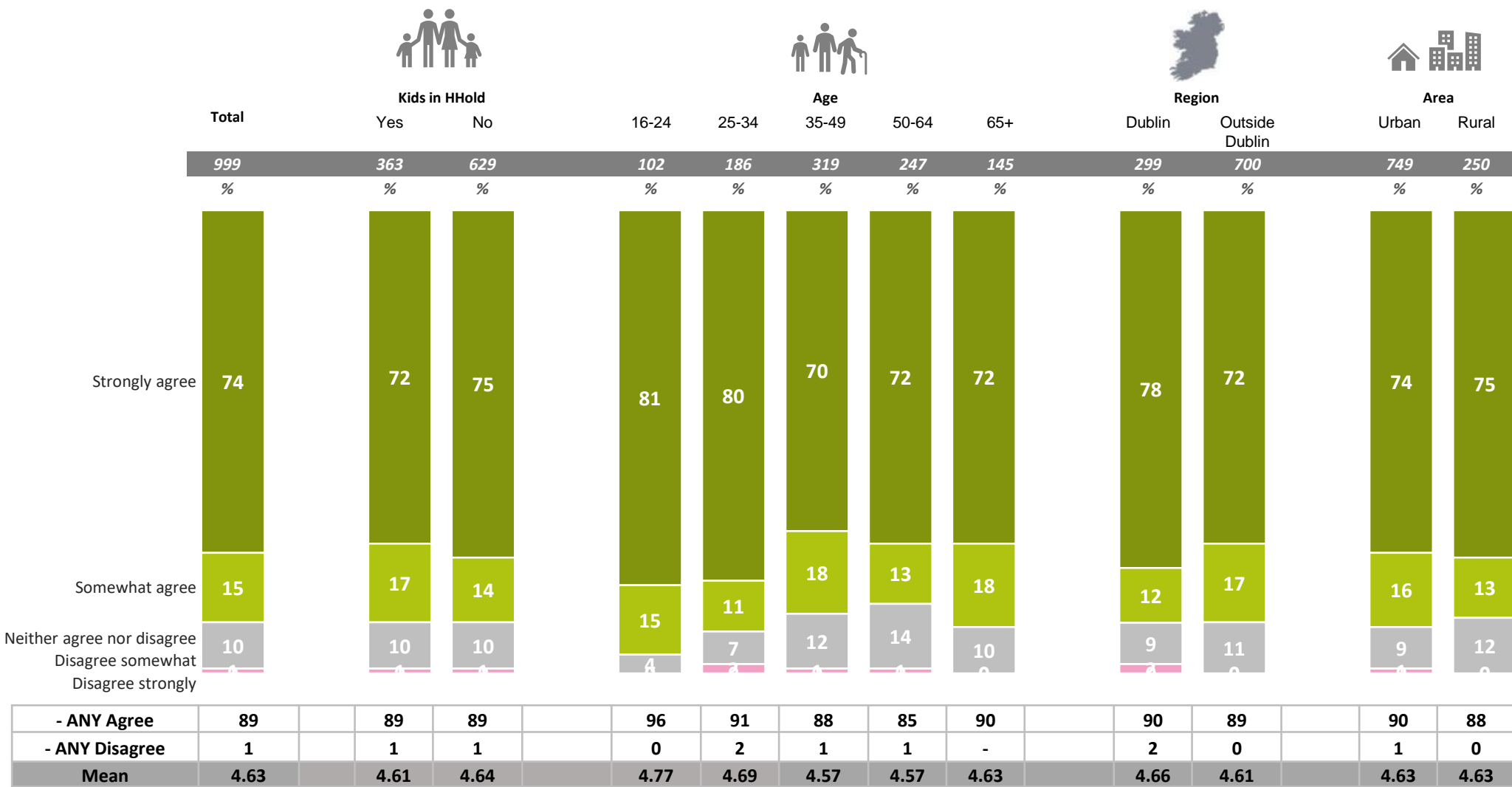
Base: All with home BB - 861



3 in 4 strongly value being able to access and use their mobile phone during the ongoing Covid-19 pandemic

Base: All with mobile - 999

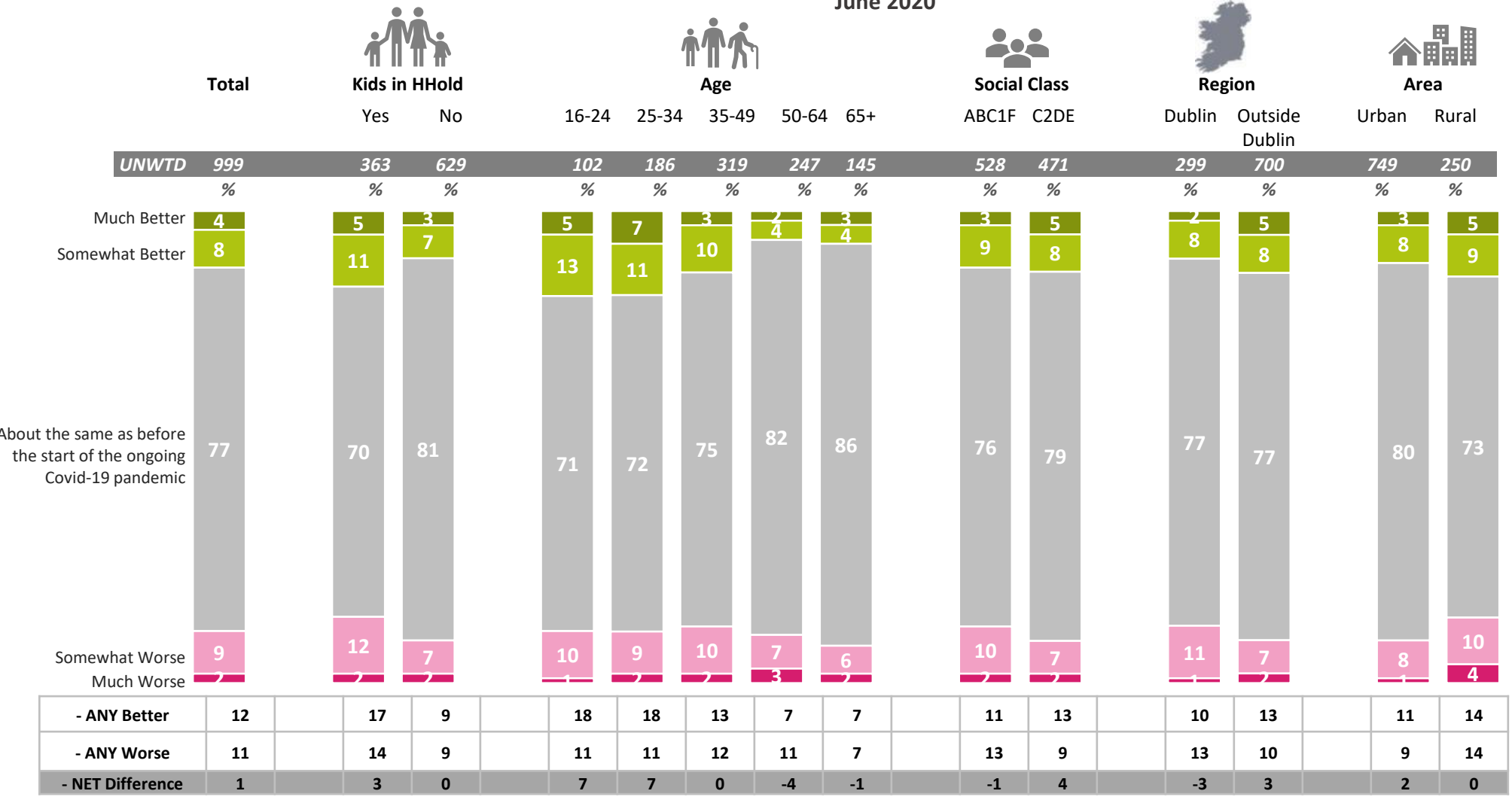
June 2020



Experience of making and receiving voice calls while at home on mobile since the start of the ongoing Covid-19 pandemic

Base: All with mobile - 999

June 2020

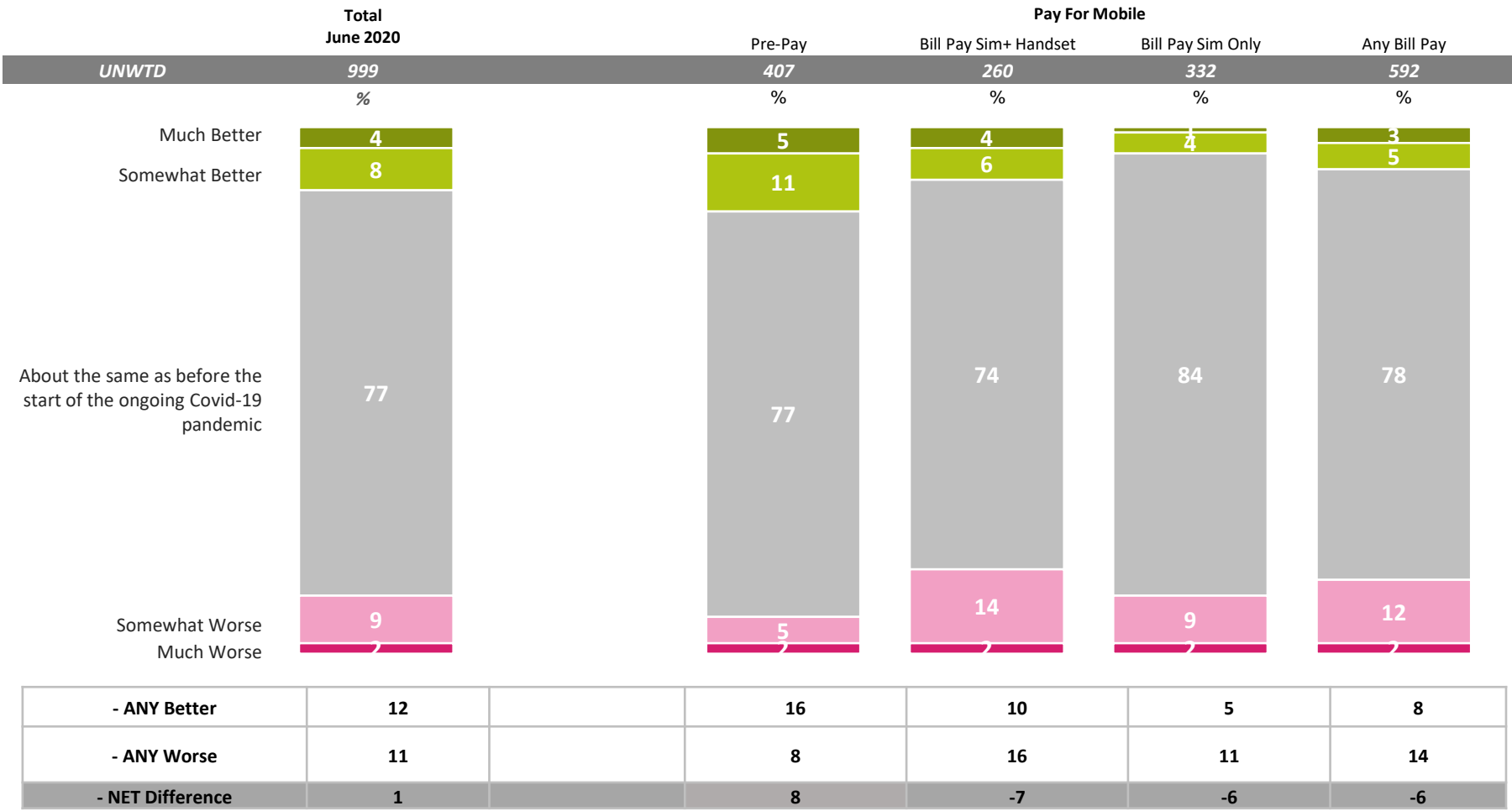


No real change in mobile calling experience during the pandemic.



Experience of making and receiving voice calls while at home on mobile since the start of the ongoing Covid-19 pandemic

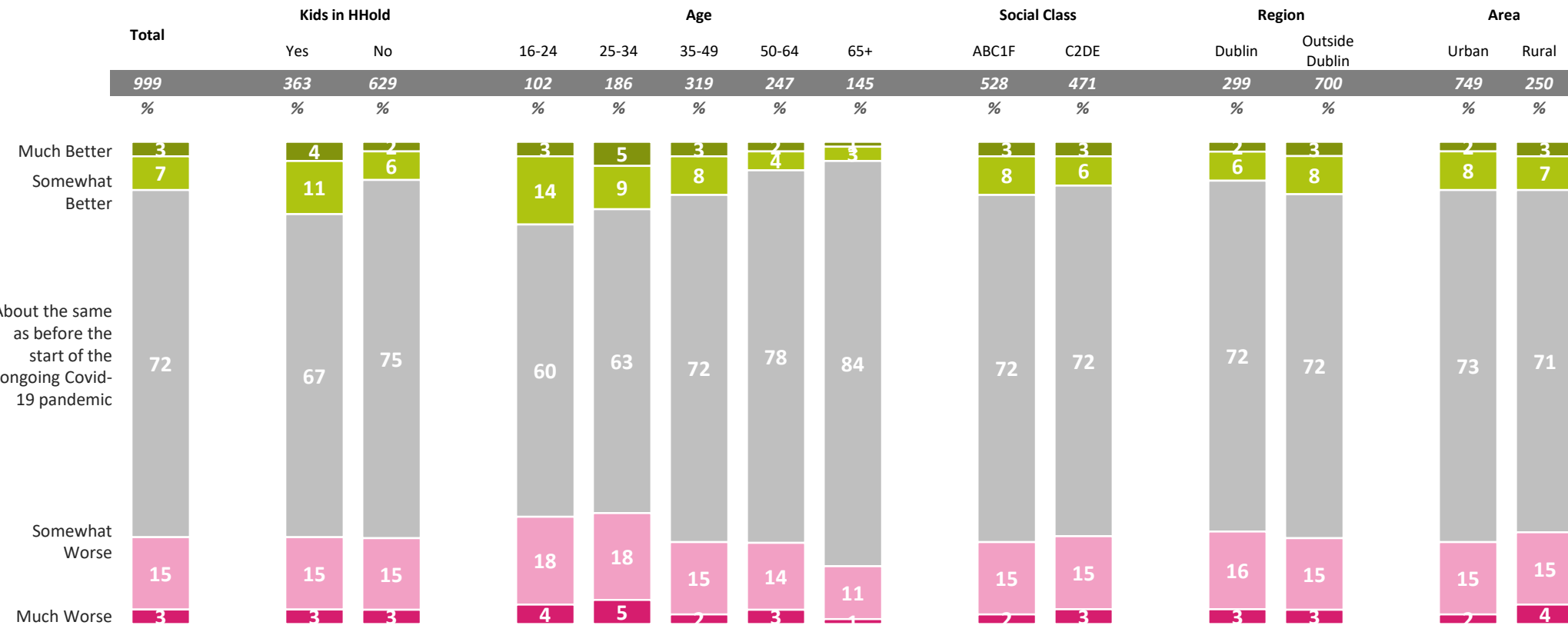
Base: All with mobile - 999



Experience of using 3G/4G data while at home on mobile since the start of the ongoing Covid-19 pandemic

Base: All with mobile - 999

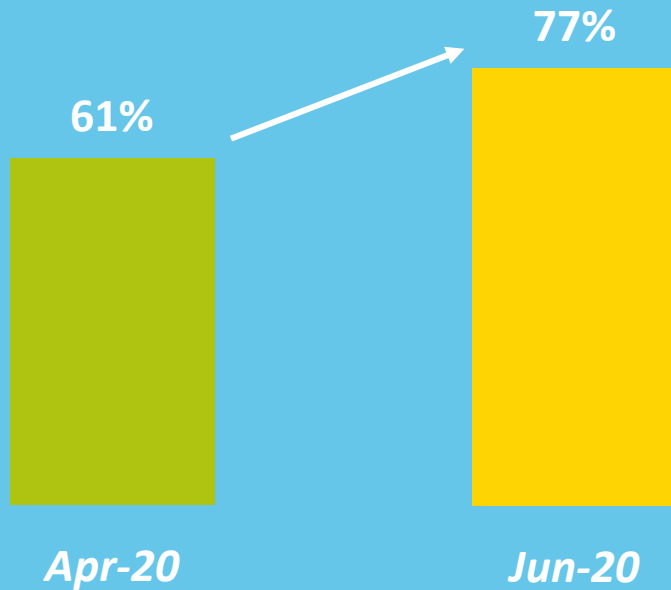
June 2020



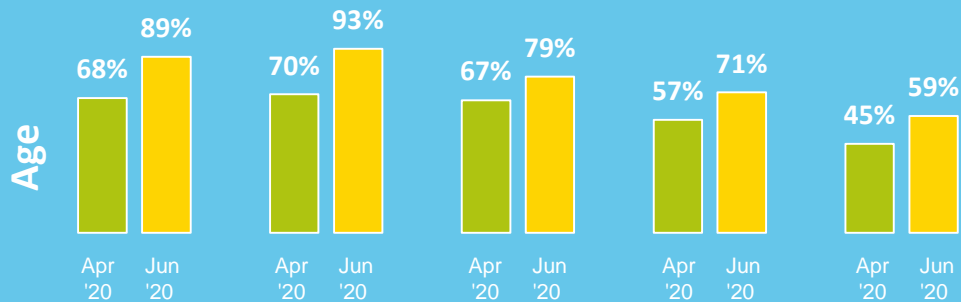
- ANY Better	10	15	7	17	14	11	5	4	11	9	9	10	10	10
- ANY Worse	18	18	18	22	23	17	17	12	17	19	19	17	17	19
- NET Difference	-8	-3	-10	-5	-9	-7	-12	-8	-6	-10	-10	-7	-7	-10



People are continuing to expand their broadband usage at home since Covid



Age				
16-24	25-34	35-49	50-64	65+



All age groups see an increase in usage of Broadband.



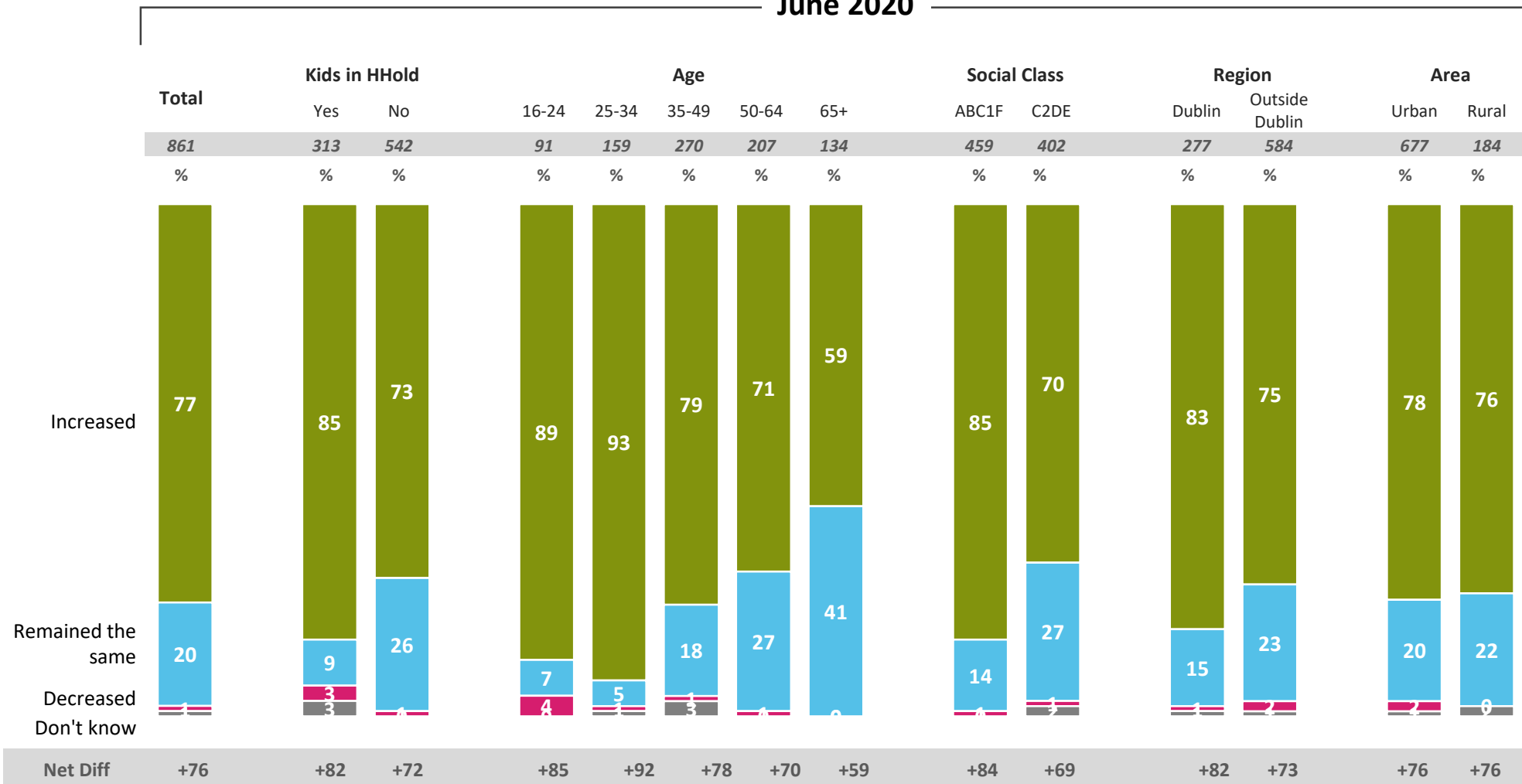
Q.28 Do you think your household's usage of your home broadband has increased, decreased or remained the same since the start of the ongoing Covid-19 pandemic?

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

Household usage perception of home broadband since the start of the ongoing Covid-19 pandemic

Base: All have BB - 861

June 2020

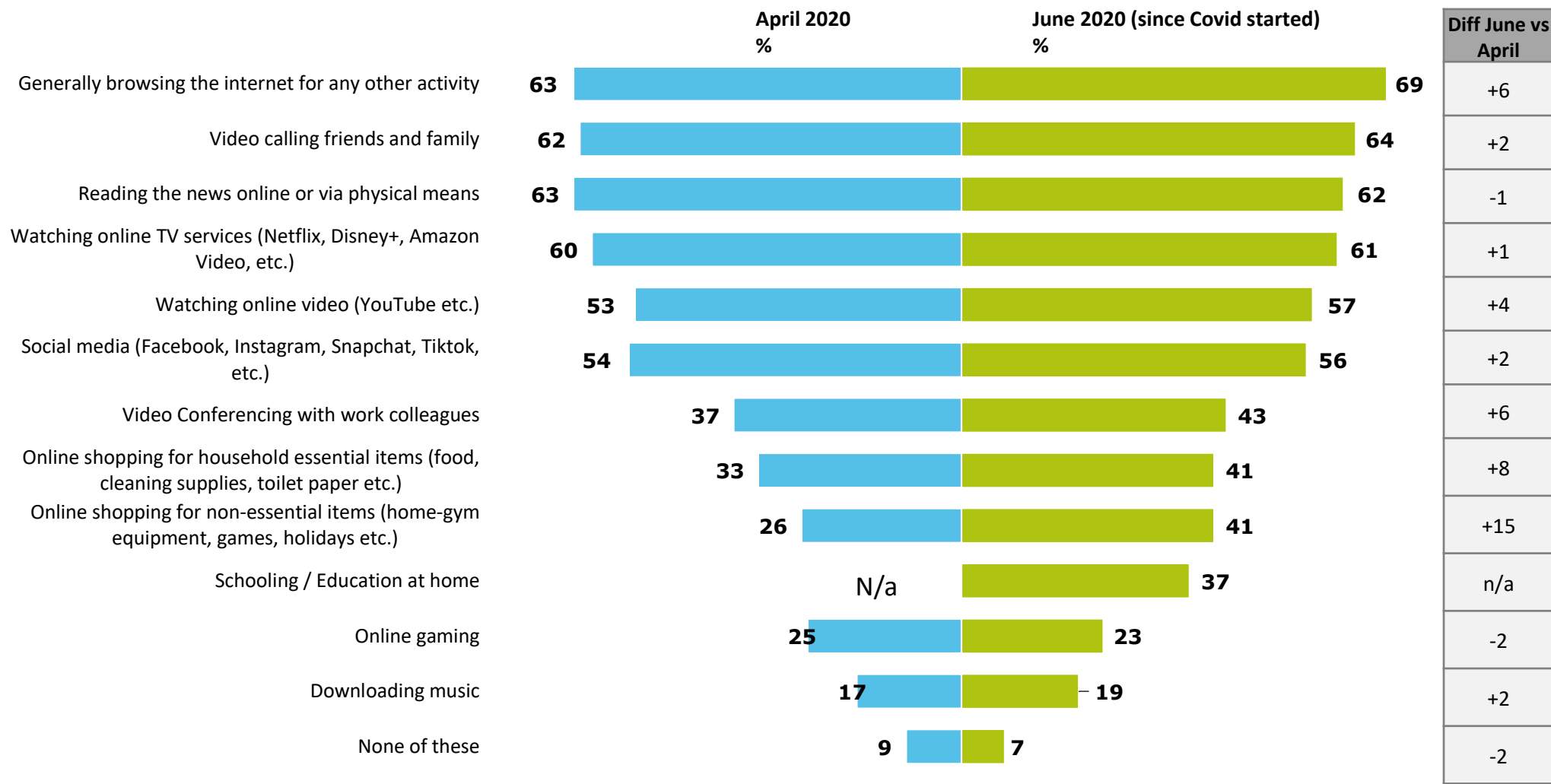


The 'Increased' figure was 61% in April 2020, thus people are continuing to expand their broadband usage at home since Covid.



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

Base: All have Broadband 861



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

Base: All have Broadband 932

	Total	Age					Social Class		Region					Area	
		16-24	25-34	35-49	50-64	65+	ABC1F	C2DE	Dublin	Outside Dublin	Leinster	Munster	Conn/Ulster	Urban	Rural
UNWTD	861	91	159	270	207	134	459	402	277	584	223	213	148	677	184
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Generally browsing the internet for any other activity	69	73	85	71	62	58	72	66	67	70	65	73	75	70	68
Video calling friends and family	64	81	77	58	60	51	72	56	71	61	58	59	67	67	56
Reading the news online or via physical means	62	69	68	69	52	53	67	57	59	63	58	68	63	63	60
Watching online TV services (Netflix, Disney+, Amazon Video, etc.)	61	88	72	67	55	27	70	52	68	58	55	64	55	64	54
Watching online video (YouTube etc.)	57	79	72	61	46	32	64	51	60	56	54	60	53	59	52
Social media (Facebook, Instagram, Snapchat, Tiktok, etc.)	56	82	71	55	48	30	61	51	58	55	50	60	56	56	56
Video Conferencing with work colleagues	43	60	62	47	36	13	60	26	53	38	41	36	37	44	41
Online shopping for household essential items (food, cleaning supplies, toilet paper etc.)	41	34	51	45	34	39	40	42	37	43	39	48	41	40	44
Online shopping for non-essential items (home-gym equipment, games, holidays etc.)	41	52	57	47	31	19	46	36	45	39	33	44	43	42	39
Schooling / Education at home	37	53	38	54	28	7	42	32	32	39	39	38	41	34	43
Online gaming	23	55	26	24	12	6	29	18	27	22	17	27	23	25	19
Downloading music	19	34	16	17	16	14	23	15	15	21	18	22	24	17	23
None of these	7	-	1	3	13	15	4	9	7	7	8	5	8	7	7

Q.29 Has your usage of these online activities increased, decreased or remained the same since the start of the ongoing Covid-19 pandemic

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

Base: All adults 16+ 1004

June 2020



Age



Social Class

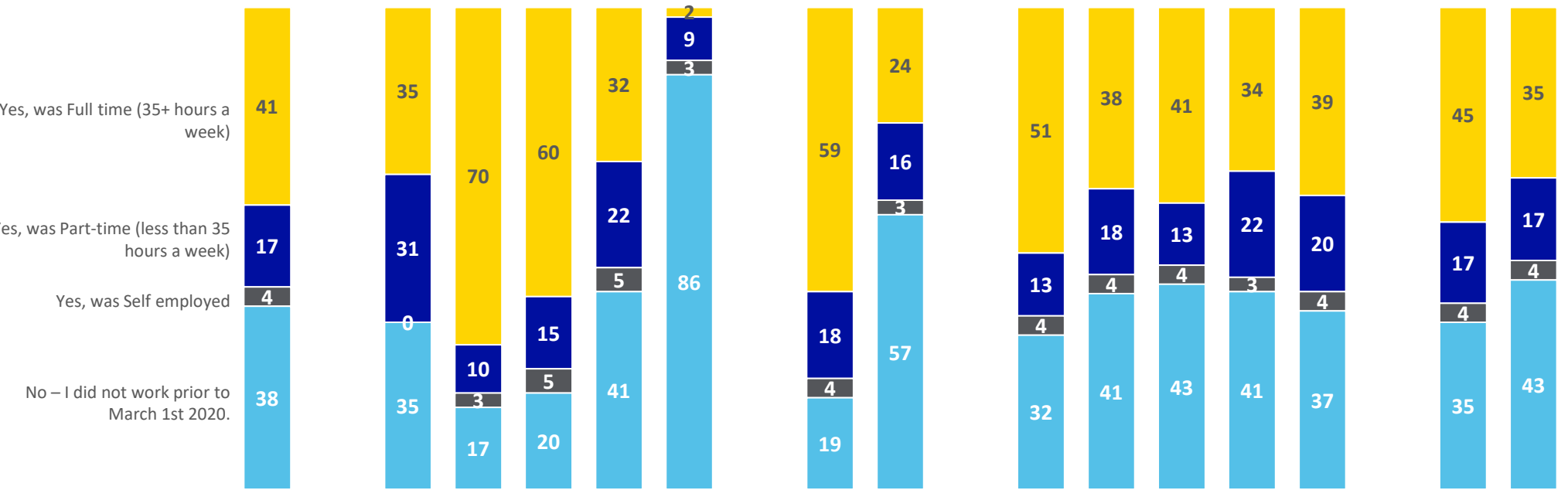


Region



Area

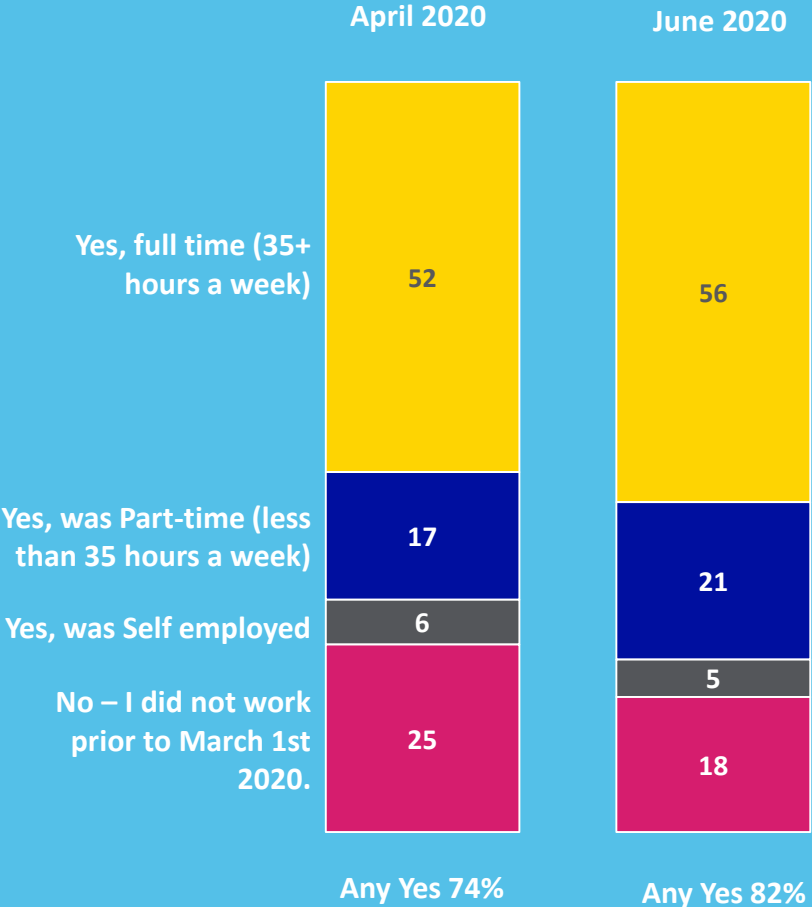
Total	16-24	25-34	35-49	50-64	65+	ABC1F	C2DE	Dublin	Outside Dublin	Leinster	Munster	Conn/ Uls	Urban	Rural
1004	102	186	319	248	149	530	474	299	705	259	263	183	752	252
%	%	%	%	%	%			%	%	%	%	%	%	%



June 2020 Any Yes	62	65	83	80	59	14	81	43	68	59	57	59	63	65	57
April '20 ANY YES	63	59	84	78	66	17	80	45	65	62	61	62	62	65	58

Now 1 in 5 of workers are no longer working

Base: All working prior to March 1st:

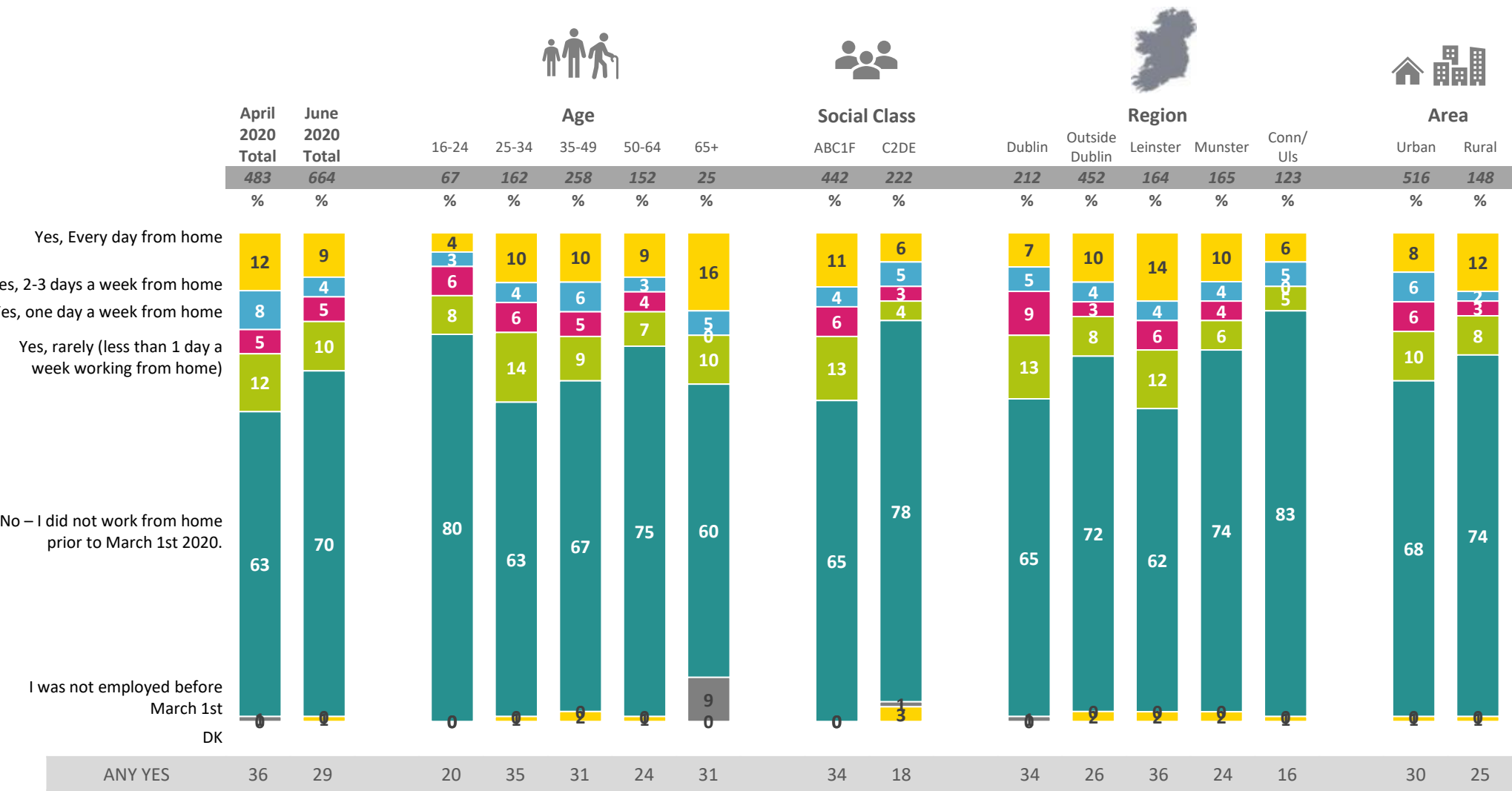


Q.31 And now are you working?

About 1 in 3 of those now working, worked from home to some degree prior to 1st March 2020

Base: All working now: 664

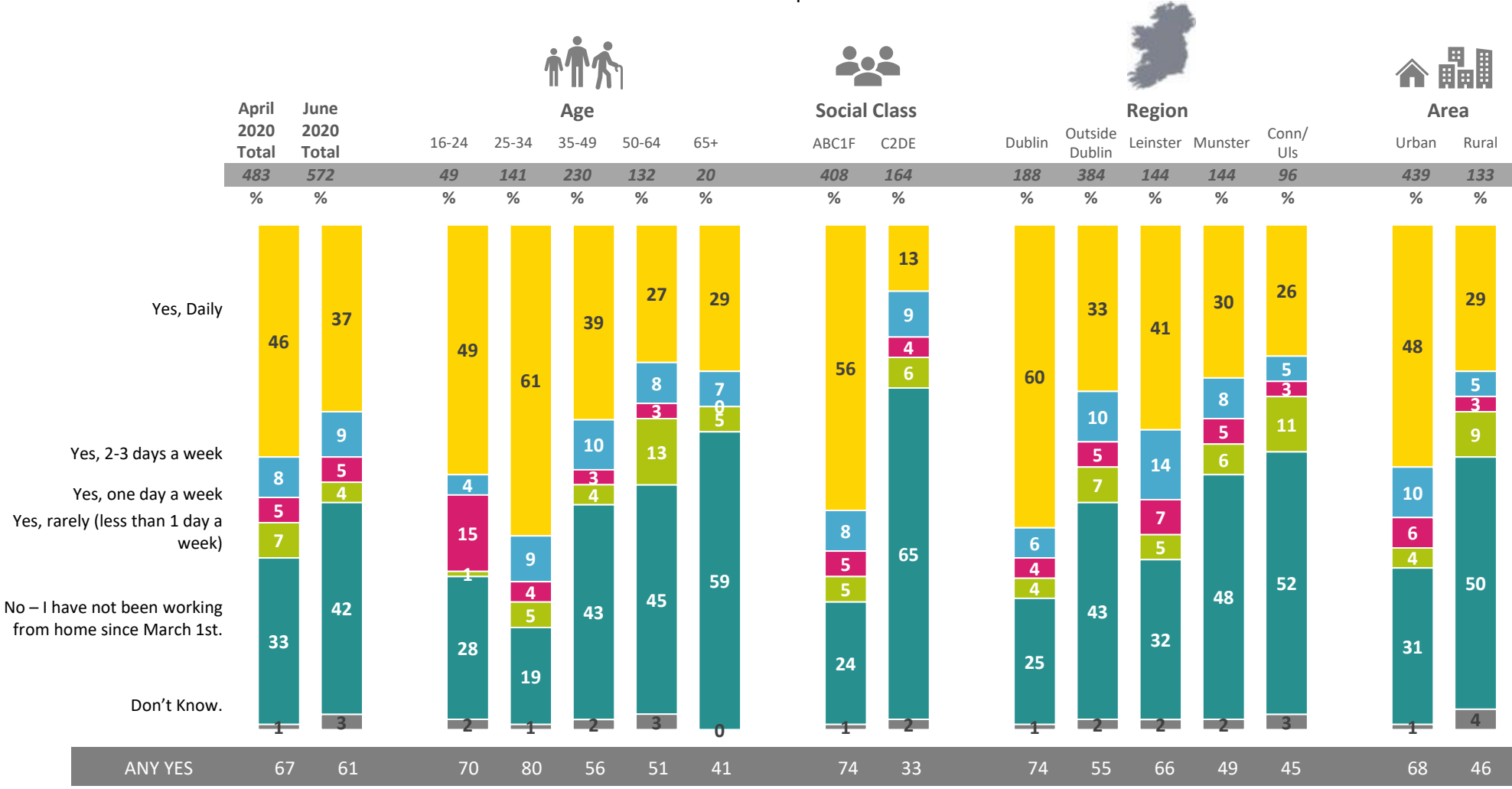
June 2020



3 in 5 of all those now working are working from home to some degree (was 67% in April)

Base: All currently working 483

April 2020



Q.33 Since March 1st, have you begun to work from home (using a PC, laptop, tablet and/or mobile phone to undertake your normal work while at home) due to the ongoing Covid-19 pandemic.

Services used to carry out work-related activities while at home during the ongoing Covid-19 pandemic

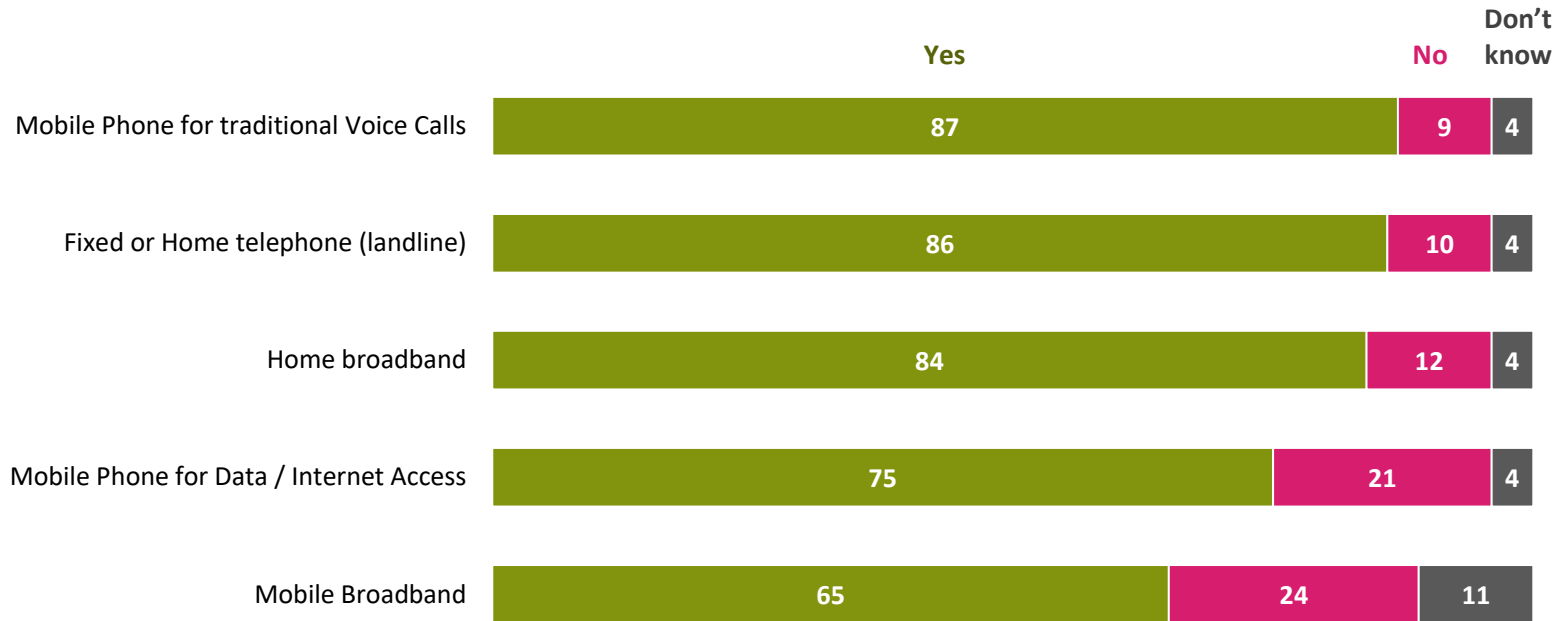
Base: All working now 572

	Total	Age		Social Class		Region		Area	
		16-34	35+	ABC1	C2DE	Dublin	Outside Dublin	Urban	Rural
UNWTD	572	190	382	408	164	188	384	439	133
	%	%	%	%	%	%	%	%	%
Home broadband service	66	71	63	73	49	75	61	71	55
Mobile Phone for traditional Voice/SMS	41	33	45	44	35	38	43	39	45
Mobile Phone Data (e.g. Internet/Email on your mobile phone handset)	40	36	43	42	37	39	41	39	43
Fixed or Home telephone (landline)	11	8	13	13	8	8	13	10	14
Mobile Broadband service (e.g. Dongle)	8	7	9	9	6	7	9	7	13

Extent each service is adequate for work related activities at home during Covid-19

Base: All using each service at home for work

Do you believe that your current ... service is adequate to allow you to carry out your work related activities that you are currently using this service for while at home during the ongoing Covid-19 pandemic



Thank you.



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