Commission for
Communications Regulation

Consumer ICT Survey
Q4 2008

A Review of Findings
by
Millward Brown IMS

February 2009

41108054 JMM/PM/SB

www.comreg.ie

PRESENTATION OUTLINE

Commission for Communications Regulation

- **Methodology**

- **Research Findings**
  - Fixed line market
  - Mobile market
  - The Internet and Broadband
  - Broadcasting
  - Bundled Services
  - Awareness of ComReg
  - Attitudes to Technology

- **Conclusions**

- **Appendix**

METHODOLOGY - I

- The following report is based upon research conducted by Millward Brown IMS among a nationally representative sample of **adults aged 15 to 74 throughout the Republic of Ireland.**
- In total **1002 adults** 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 **3rd November and the 5th of December 2008.**
- 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 exact demographic profile of the adult population in the Republic of Ireland, based on the most recent data available from the CSO.
- Where possible, comparisons with previous research have been included.

METHODOLOGY - II

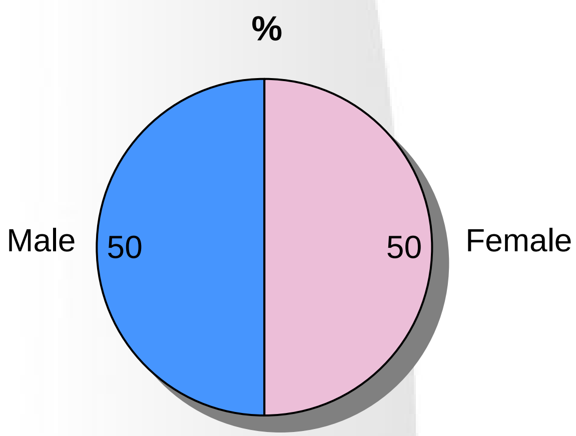
Commission for Communications Regulation

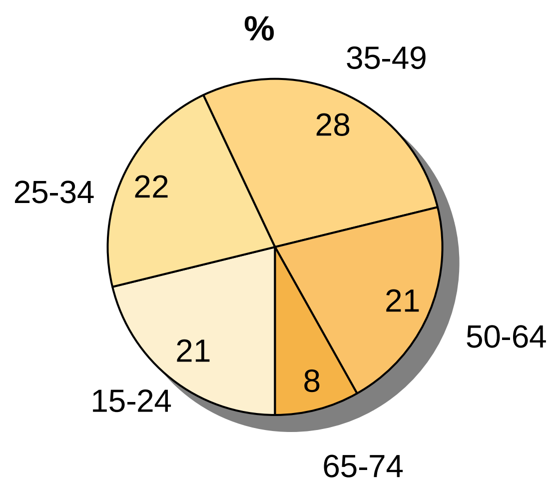
- The accuracy of this survey is estimated to be +/- 3%.
- A "*" in the data indicates that less than 1% of respondents gave that response and a "-" indicates that no one selected that response.
- Social Class definitions, as referred to in this report are largely as follows:

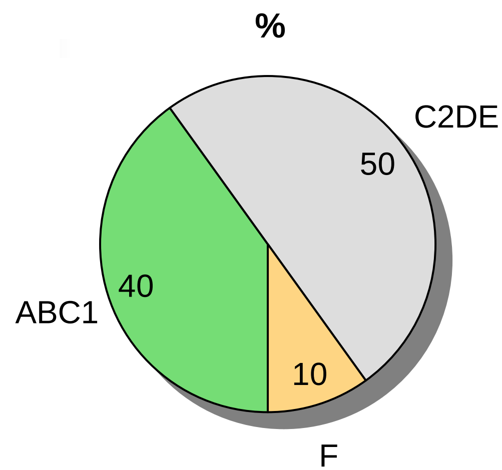
  - ABs are professionals
  - C1s are white collar workers
  - C2s are blue collar workers
  - Ds are unskilled workers
  - Es are those relying on State assistance
  - Fs are those in the farming community

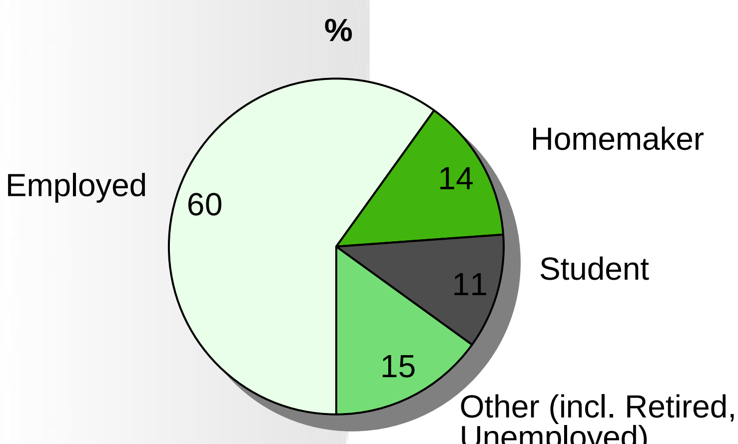
Commission for Communications Regulation

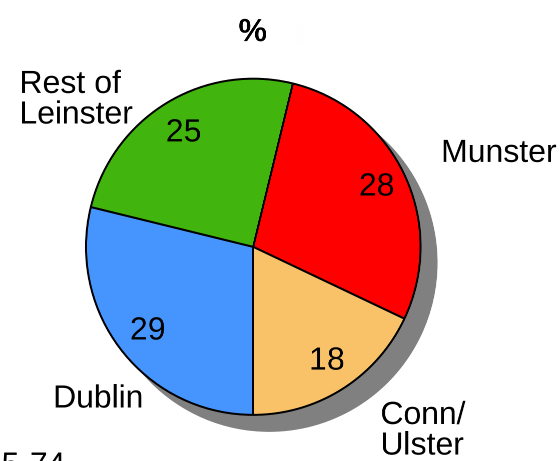
ANALYSIS OF SAMPLE











Base: All Adults 15-74

Commission for Communications Regulation

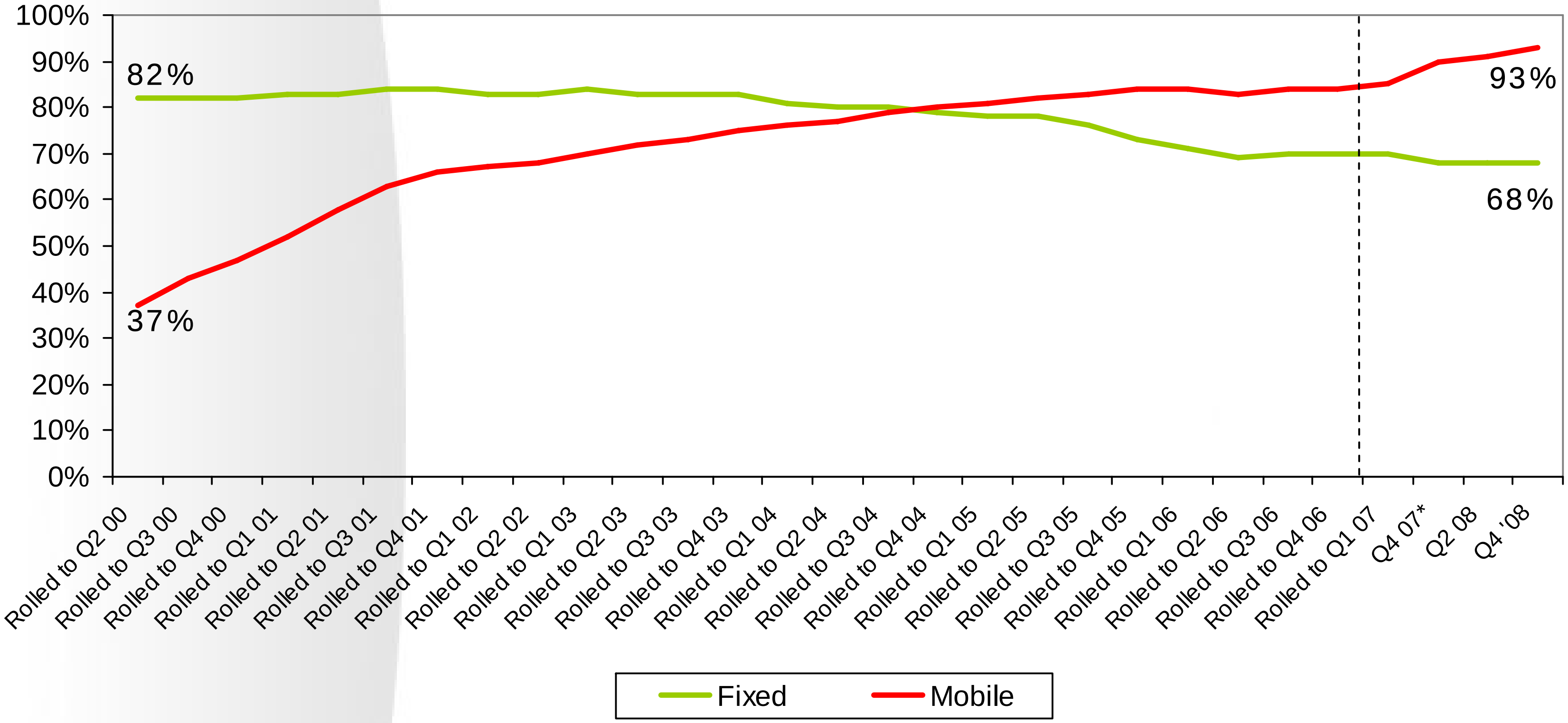
FIXED LINE MARKET

41108054 JMM/PM/SB

Continued Increase In Mobile Phone Penetration, With Fixed Line Penetration Remaining Steady

Commission for Communications Regulation

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



30% of Irish Adults rely on only mobile phones, rising to 46% among 25-34 year olds.

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

Millward Brown IMS

Almost 8 In 10 Have Eircom As Their Fixed Line Supplier

Commission for Communications Regulation

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

	Q4'07 %	Q2'08 %	Q4'08 %
Eircom	78	77	79
Perlico	7	6	6
BT Ireland (formerly Esat BT)	5	6	5
Imagine Group#	2	2	2
Chorus/UPC	1	2	2
Talk Talk/Tele2	2	2	1
Euphony	-	-	1
Smart	-	-	1
Skype^	-	-	1
Other*	2	3	1
Don't know	2	1	2

- Eircom's residential share remains relativity unchanged with nearly four in five (79%) of fixed line subscribers using them, slightly up from Q2'08.
- Those more likely to subscribe to fixed line providers other than Eircom were aged 35-49 and 50-64 (23% each), ABs (27%), residents of Leinster (excl. Dublin) 25%, and those who have a broadband connection (25%).

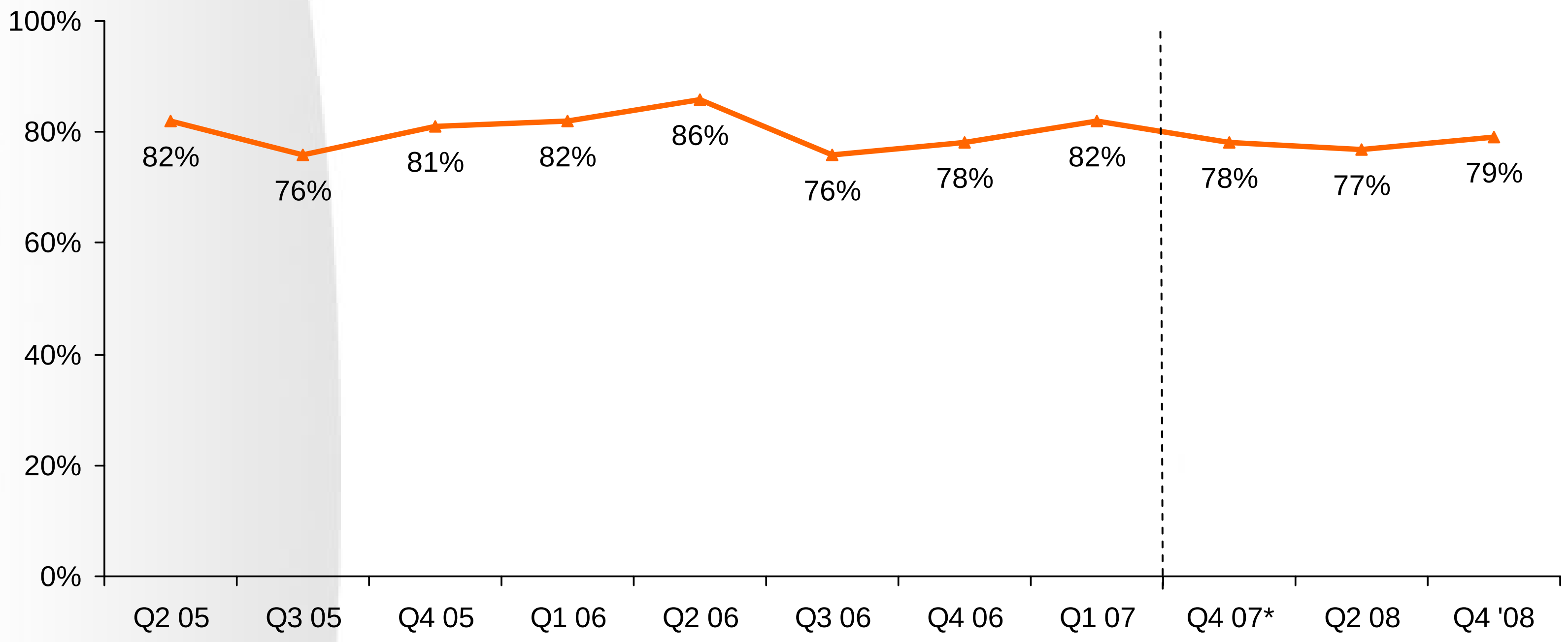
Base: All Who Have Fixed Landline (n=678)

Response Includes Gaelic, Cinergi and Access.
*Answers under 1% included in Other
^unlike other fixed line providers, Skype offers voice over broadband only and not over fixed line services

Millward Brown IMS

Historical View Of Eircom’s Fixed Line Market Share

Commission for Communications Regulation



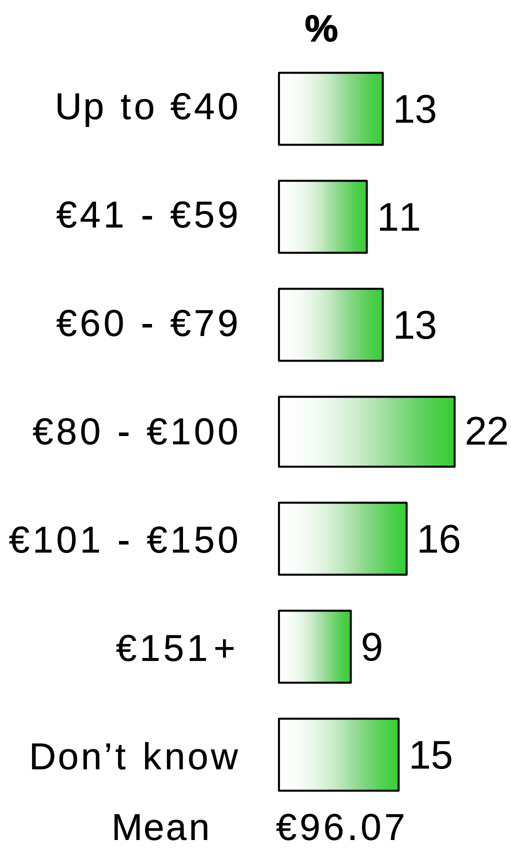
- This chart plots Eircom’s market share from research conducted in the residential market since 2005.
- According to these figures, Eircom’s market share in the residential market has not dropped below 76% since that time.
- Eircom’s market share stood at 86% in Q2 2006.

Average Bi-monthly Fixed Line Spend - €96.07

Q. How much, approximately, was your last bi-monthly telephone bill from your telephone service provider(s) including VAT?

Historical Average Spend

Q2'06 - €101.39
Q3'06 - €103.57
Q4'06 - €99.61
Q1'07 - €97.20
Q2'08 - €95.36



Base: All Who Have Fixed Line (n=678)

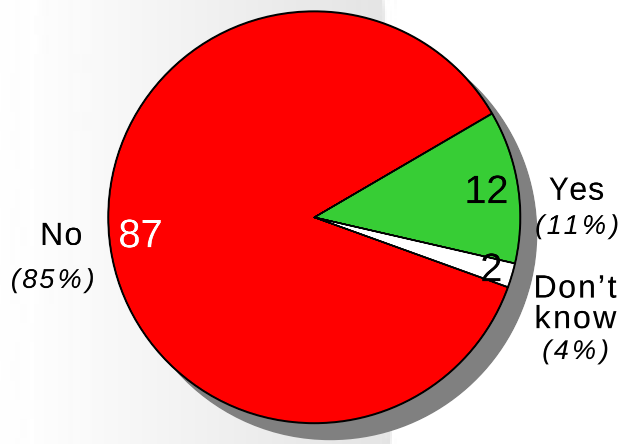
- Those spending the least (up to €40) on their fixed line are more likely to be aged 65-74 (36%), those in the C2DE social class group (17%), and are also more likely to be unemployed/retired (26%). Those without a PC (27%) or Internet (26%) at home also claim to spend less.
- While those aged 35-49 (€101), ABs (€122) and the farming community (€105) are higher spenders.
- Residents of Dublin (€103) and Connaught/Ulster (€103) also spend more, as do those with teenagers in their household (€111)
- Similarly, those with Internet access and availing of bundled services spend most (€105 and €109 respectively)

12% Of Fixed Line Customers Have Made A Complaint In The Last 12 Months

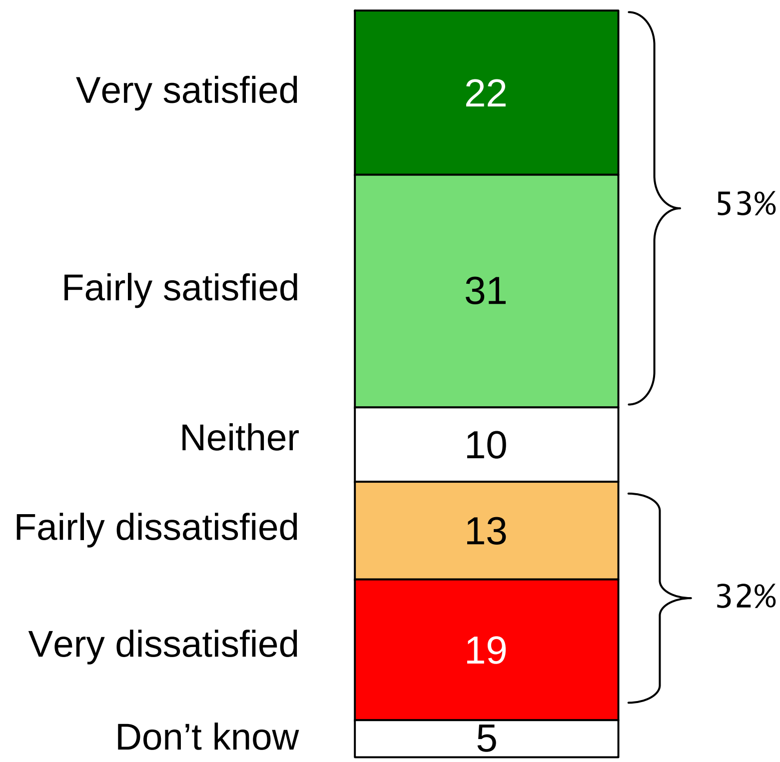
Commission for Communications Regulation

Q. Have you made a complaint to your fixed line service provider in the last 12 months?
Q. How satisfied were you with the response you received from your fixed line service provider?

Made a Complaint
%



Satisfaction with Complaint Resolution
%



Base: All Who Have Fixed Line (n=678)

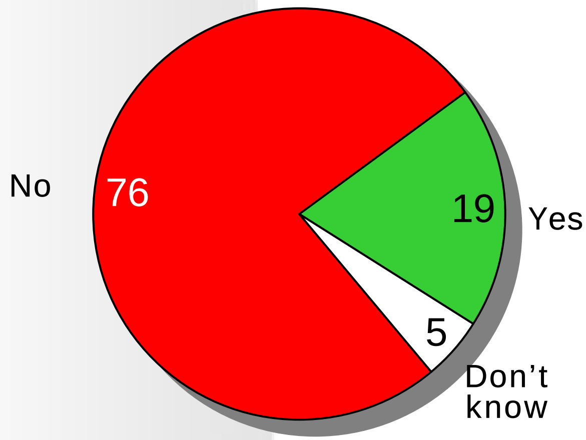
Base: All Who made complaint (n=79)

Reverse Charge Calls

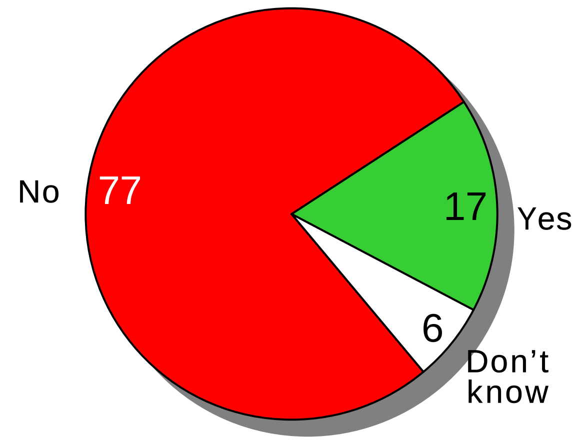
Commission for Communications Regulation

Q. Have you ever made a reverse charge call?
Q. Have you ever accepted a reverse charge call?

Made Reverse Charge Call
%



Accepted Reverse Charge Call
%



- One in five (19%) have made a reverse charge call, rising to 24% of 18-24 year olds and those aged 65-74. Residents of Dublin (25%) were also more likely to have made such a call.
- Nearly three in ten (29%) of ABs and 22% of the farming community have accepted such calls.

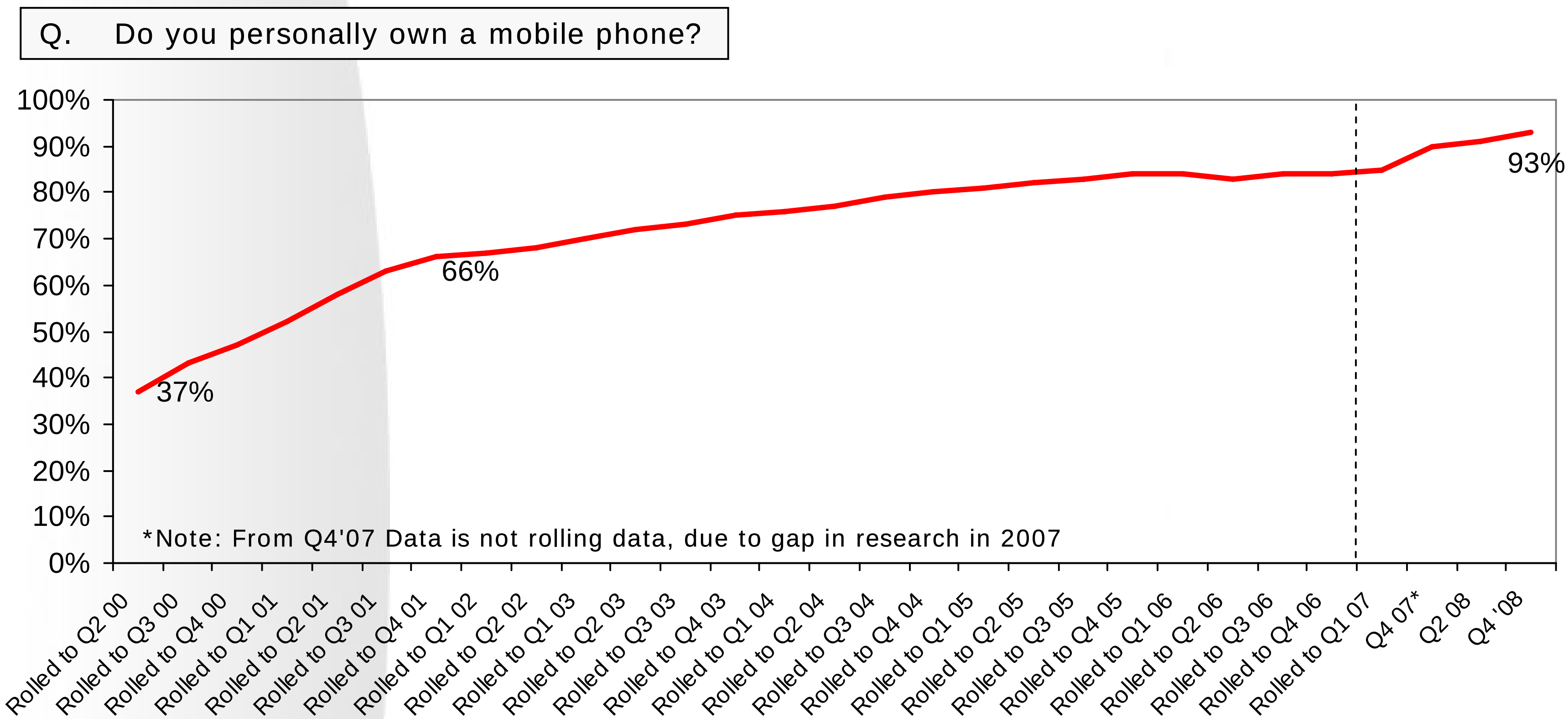
Base: All Respondents (n=1002)

Commission for
Communications Regulation

MOBILE MARKET

Mobile Phone Ownership Trends

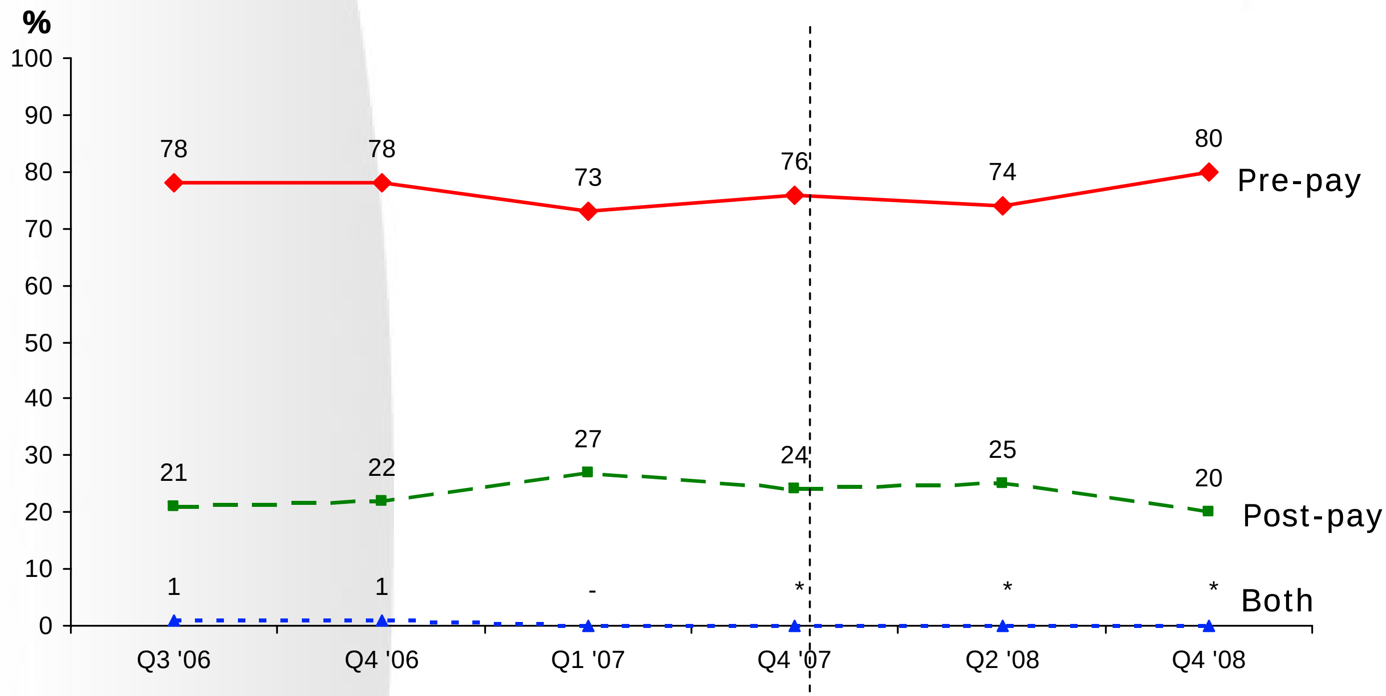
Commission for Communications Regulation



- Mobile phone Ownership is nearly universal, though 67% of those aged 65-74 and 83% of farming community own a mobile phone. In addition, those without a PC or Internet access at home are less likely to have a mobile (85% ownership).

Increase in Pre-Pay Customers

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



- There has been an increase in the proportion of mobile phone users opting for Pre-Pay. This is largely driven by females (84%) younger customers (95% of 15-24 year olds), DEs and Fs (87% and 92% respectively).

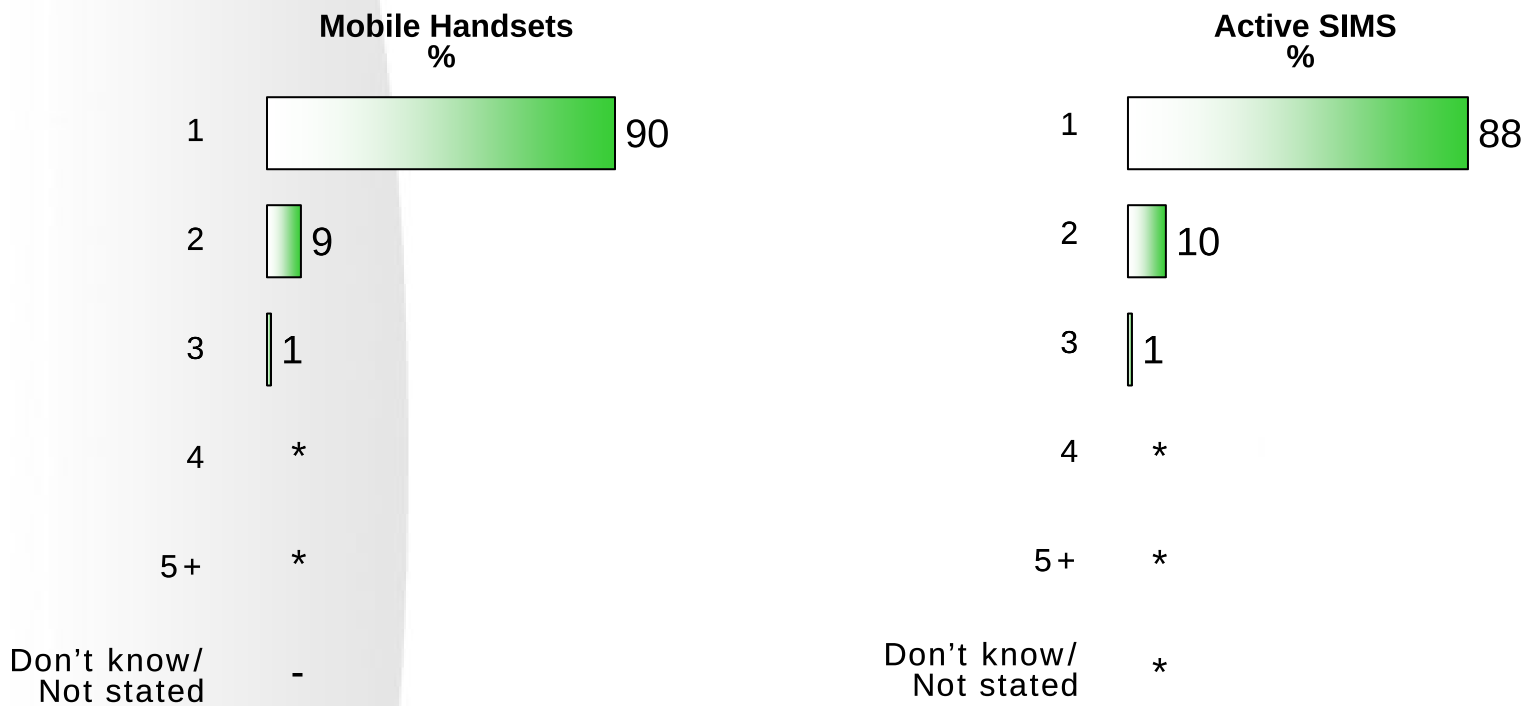
- Meteor customers are most likely to opt for Pre-Pay (87%) than other mobile operators' customers.

Base: All Mobile Phone Users (n=940)

Vast Majority Have One Handset And One SIM Card

Commission for Communications Regulation

Q. How many mobile handsets do you own, for both business and personal usage?
Q. How many ACTIVE mobile SIM cards do you own? An active SIM card means that it has been used at least once in the last 3 months.



Base: All with mobile phone (n=940)

Millward Brown IMS

www.comreg.ie

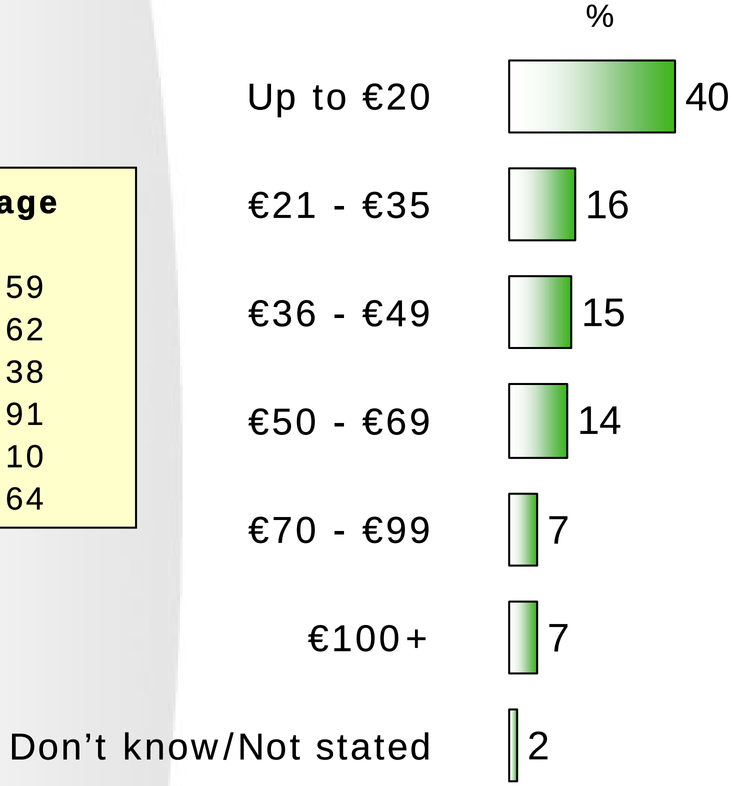
Average Monthly Mobile Spend - €41.64

Commission for Communications Regulation

Q. Approximately how much do you spend per month topping up your mobile phone or on your mobile monthly bill?

Historical Average Spend

Q1’06 - €54.59
Q2’06 - €57.62
Q3’06 - €54.38
Q4’06 - €55.91
Q1’07 - €53.10
Q2’08 - €45.64



Mean €41.64

- Average Mobile Spend has decreased significantly again this wave of research suggesting that customers are availing of more competition and better deals.
- Monthly spend is higher among males (€45), 25-34 year olds and 35-49 year olds (€45 and €49 respectively)
- ABs spend on average €54/month, compared to €37/month among DEs and €36/month among the farming community.
- Those with a monthly subscription spend over twice as much as Pre-Pay customers (€74 v €33).

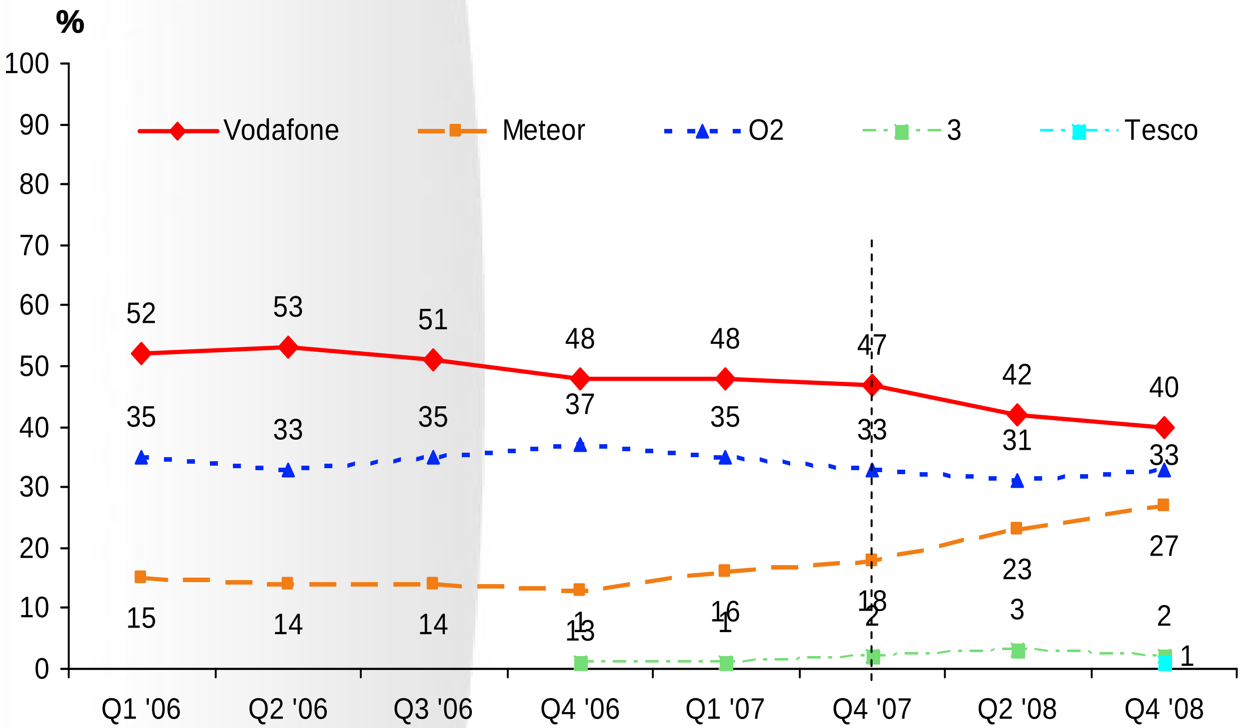
Base: All Mobile Phone Users (n=940)
*Caution: Small base size

Mobile Networks Used

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

Pre-Pay and Post-Pay Split by Provider

Vodafone Post-Pay: 23%	**O2 Post-Pay: 24%**	**Meteor Post-Pay: 13%**
Vodafone Pre-Pay: 78%	**O2 Pre-Pay: 77%**	**Meteor Pre-Pay: 87%**



- Vodafone's share continues to decline, while O2 has seen a marginal increase in its market share. Meteor's continues to grow while 3 remains relatively unchanged.
- Meteor continues to perform better among 15-24 year olds (44%). Vodafone's use is strongest among those aged 65-74 (55%) and O2 is more prominent among 35-49 year olds (40%).
- Meteor's customers are more likely to be based in Dublin (41%) while Vodafone performs best in Munster (46%) and O2 in Connaught/Ulster (43%).

Base: All Mobile Phone Users (n=940)

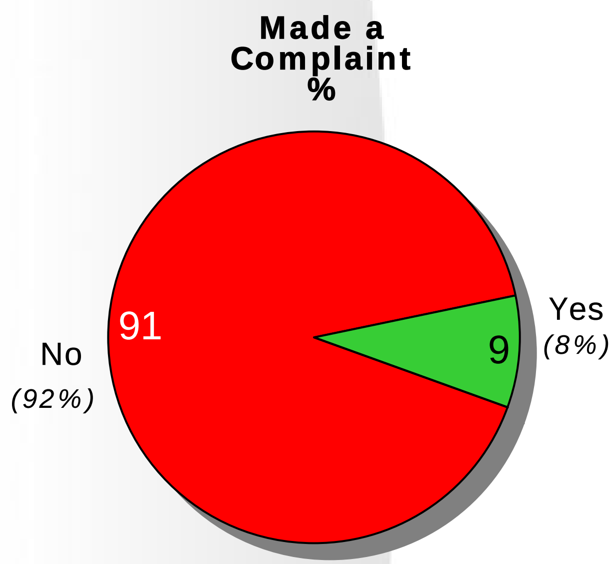
In Q2'08 Tesco Mobile's market share was found to be less than 1%

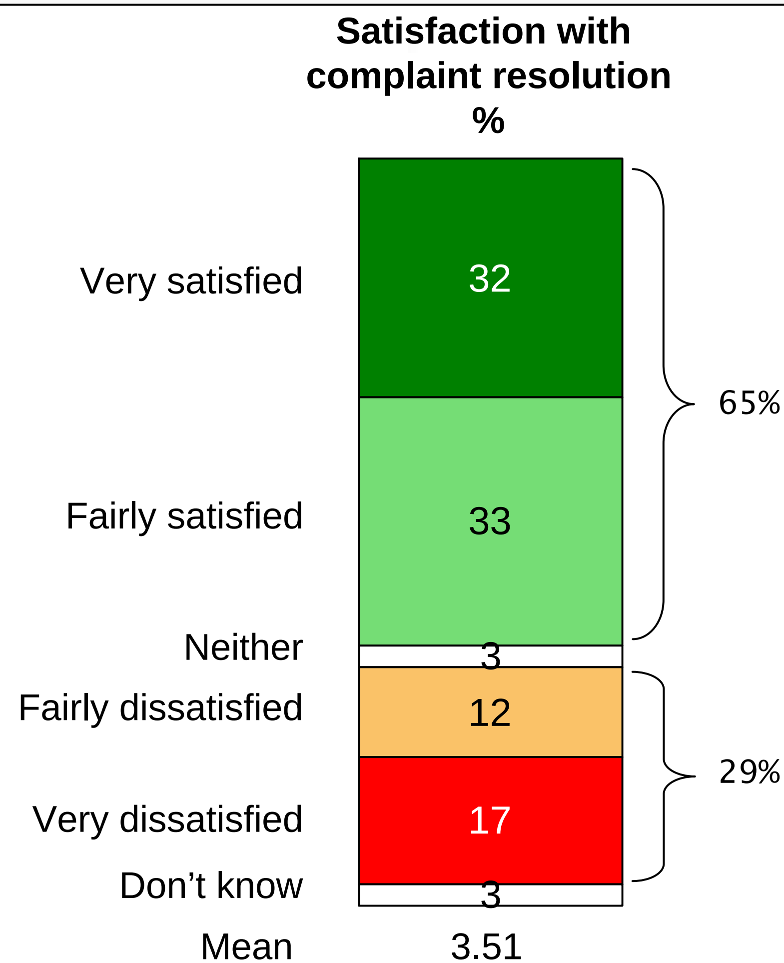
Millward Brown IMS

www.comreg.ie

9% Of Mobile Subscribers Have Made A Complaint To Their Service Provider In The Last 12 Months

Q. Have you made a complaint to your mobile phone service provider in the last 12 months?
Q. How satisfied were you with the response you received from your mobile phone service provider?





Base: All with mobile phone (n=940)

Base: All who made a complaint (n=82)

Millward Brown IMS

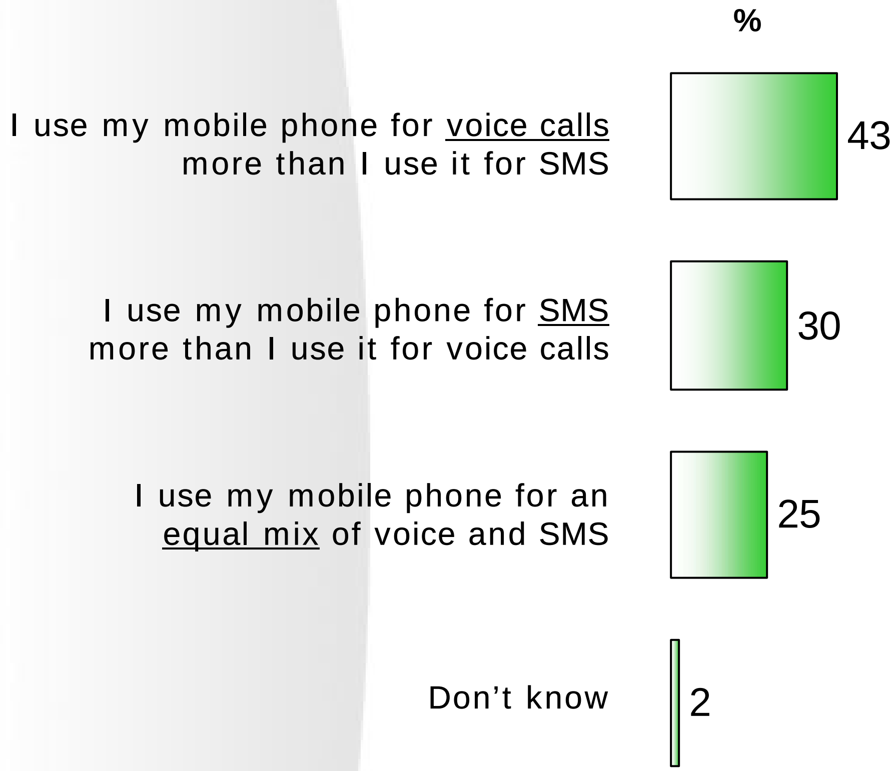
() Bracketed figures denote Q3 '06 data

www.comreg.ie

Use of Mobile Phone: Talk or Text?

Commission for Communications Regulation

Q. Please identify which of the following statements most accurately describes how you currently use your mobile phone



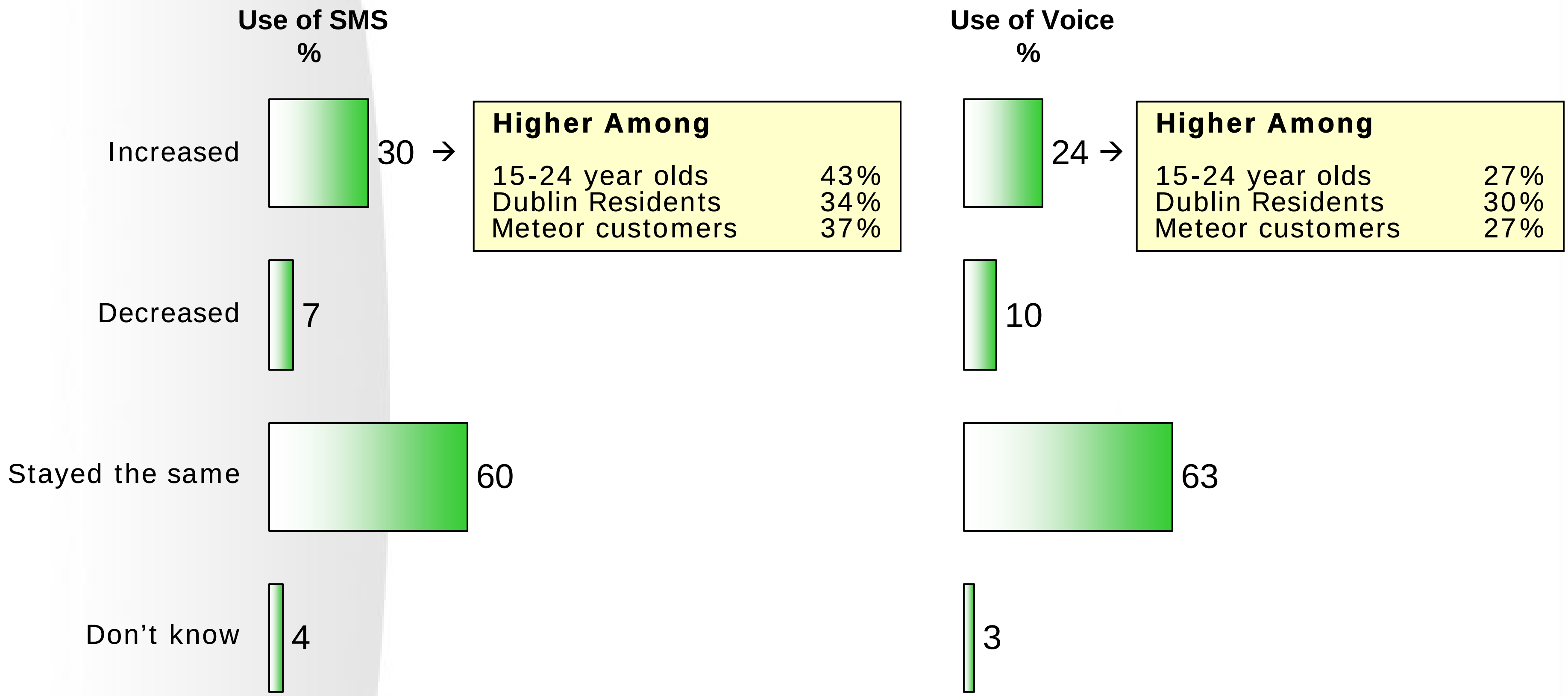
- Age is more likely to determine whether a person talks or texts more.
- Pre-Pay customers are more likely to use their phones for SMS (mainly) although this may well be a function of their demographic profile i.e. younger people are most likely to have Pre-Pay mobiles and are also most likely to use SMS.

Base: All with mobile phone (n=940)

Change In Patterns Of Mobile Phone Usage For Voice And Text

Commission for Communications Regulation

Q. Compared to 6 months ago, has your use of SMS text messages on your mobile phone…
Q. Compared to 6 months ago, has your use of voice services on your mobile phone…

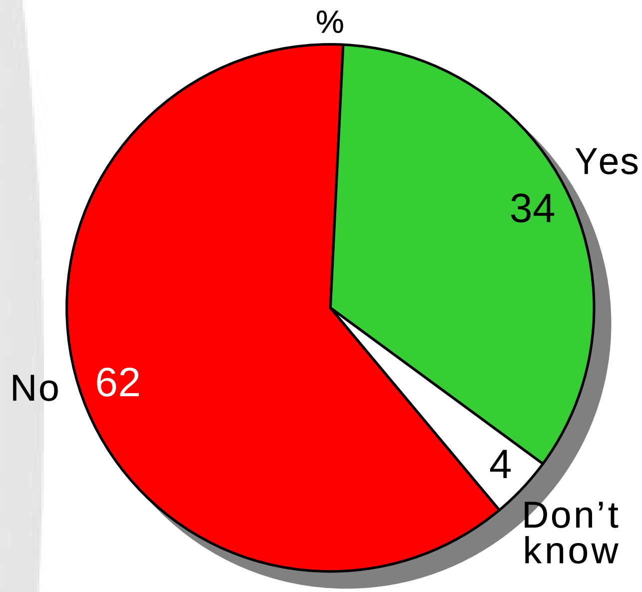


Base: All with mobile phone (n=940)

Awareness Of Proposal to Cap SMS Charges

Commission for Communications Regulation

Q. Are you aware of proposals to cap charges for making and receiving SMS text messages on your mobile when elsewhere in the European Union?



- Approximately a third of respondents with a mobile phone (34%) are aware of the proposals to cap the cost of an SMS while roaming within the EU.
- This figures rises among males, those aged 25-34 (39% each) and those in the AB and F social groupings (41%). People who are employed (37%), those who live in Connaught/Ulster (46%) and those with a Postpay mobile contract (45%) are also more likely to be aware of this proposal.

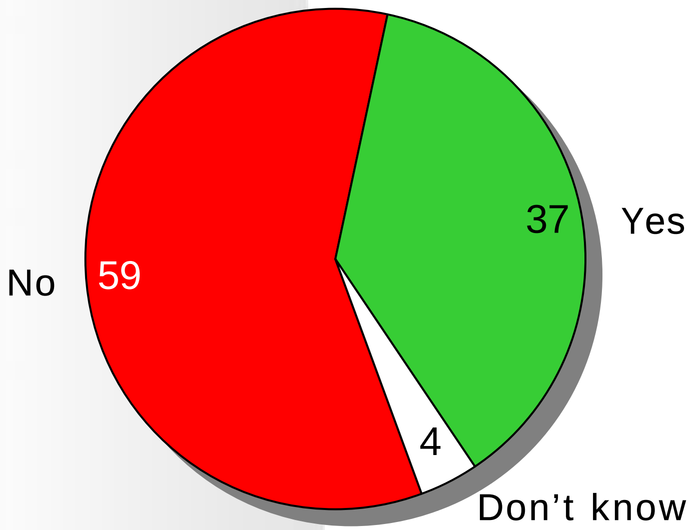
Base: All with mobile phone (n=940)

Over One Third Aware Of Voice Roaming Price Cap

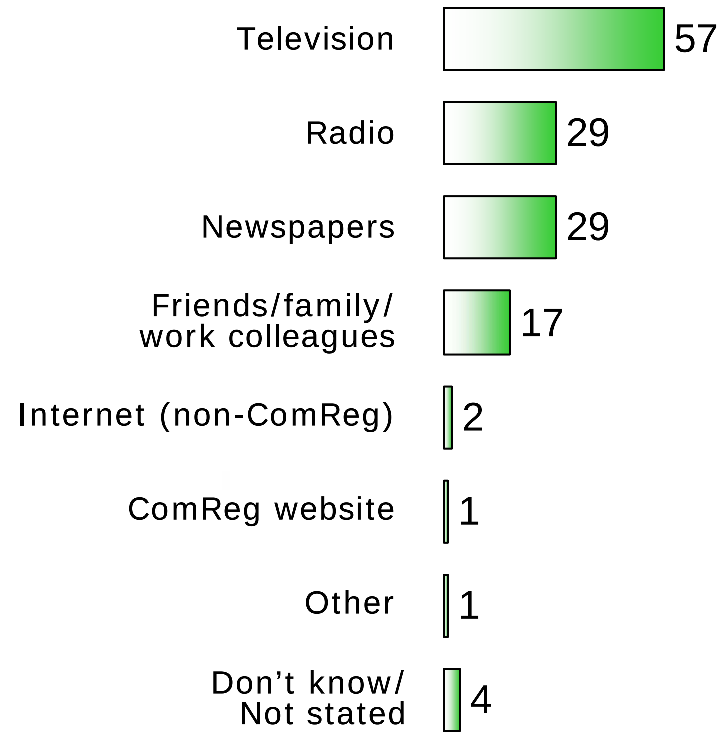
Commission for Communications Regulation

Q. Are you aware that charges for making and receiving calls on your mobile phone when elsewhere in the European Union were capped in 2007 as a result of new EU regulations?
Q. Where did you hear about this price cap? Anywhere else?

Awareness of capping of EU roaming costs
%



Source of Awareness of Price Cap
%



- Just over one in three (37%) mobile customers claim to be aware of roaming calls being capped.
- Those most likely to claim awareness are male (42%), aged 35-49 (42%), ABs (45%) or from the farming community (47%), along with residents of Connaught/Ulster (53%).

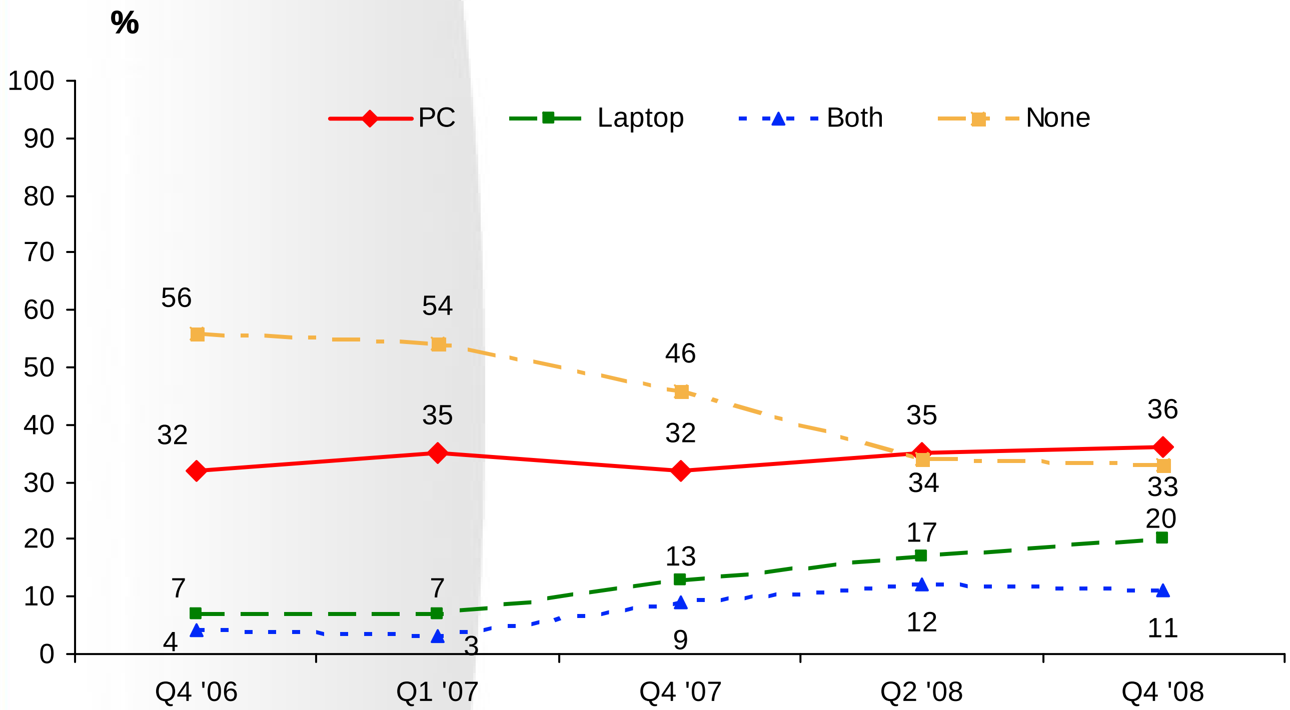
Base: All Mobile Phone Users (n=940)

Base: All aware of price cap (n=361)

THE INTERNET & BROADBAND

Growing PC And Laptop Ownership

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



Base: All Respondents (n=1002)

Laptop and PC – 11% Higher Among

35-49	15%
ABs	25%
Students	16%
Living in Dublin	20%
With Children	14%
Fixed Line	14%
Home Internet Access	18%

Laptop Only – 20% Higher Among

15-24	33%
ABs	26%
Students	36%
No Fixed Line	24%
Broadband Con.	30%

PC Only – 36% Higher Among

Males	39%
35-49	44%
Employed	40%
Fixed Line	45%
Narrowband Con.	58%

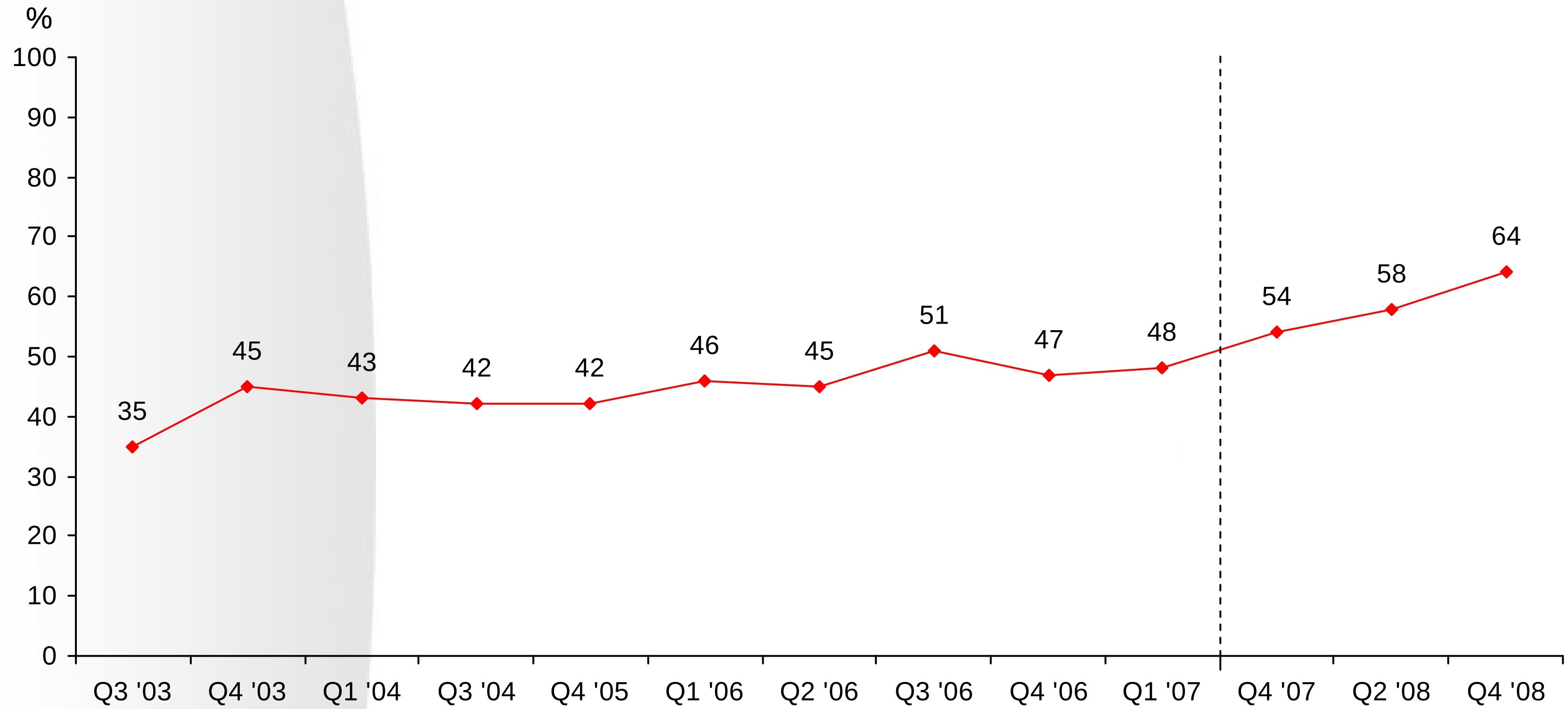
None – 33% Higher Among

65-74	70%
Fs	52%
Conn/Ulster	43%
Rural	42%

Increase In Internet Usage Over Time

Commission for Communications Regulation

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



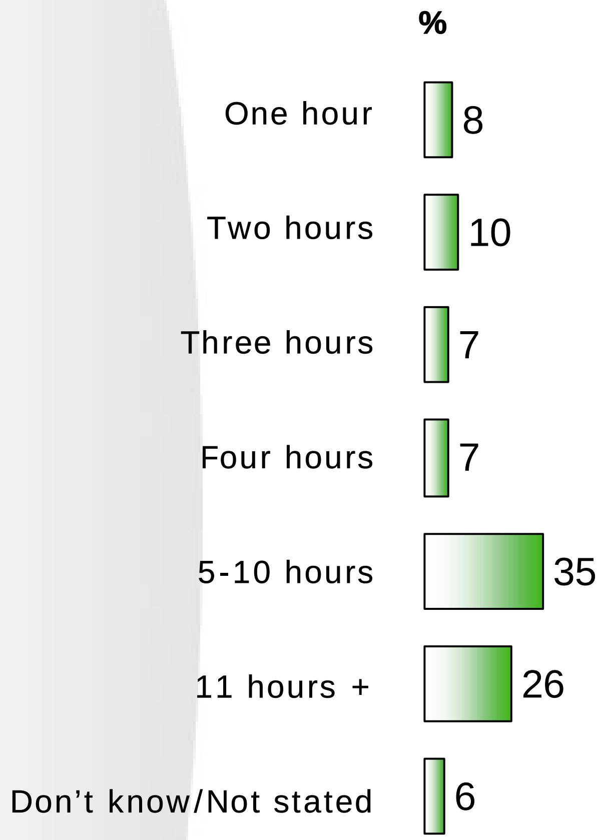
- There has been a continued increase in Internet usage, and penetration now stands at its highest level (64%) yet.
- Usage is higher among 15-24 year olds (82%), ABC1s (76%) and Urban residents (70%), particularly Dublin Residents (73%)

Base: All Respondents (n=1002)

Commission for Communications Regulation

Number Of Hours Spent On The Internet Per Week

Q. Approximately, how many hours a week do you spend using the Internet?



Mean 10.01 hours

- Those most likely to use the Internet most frequently are males (11 hours/week), 25-34 years old (11 hours/week), ABs (12), Dublin based (12) and living in rented accommodation (12 hours/week).
- Frequent users are also more likely to have broadband connection at home (11 hours), and also more likely to have a broadband connection from a supplier other than Eircom (12 hours).

Base: All Internet users (n=668)

Location Of Internet Usage

Commission for Communications Regulation

Q. From which of the following locations do you use the Internet?

	Q2 '06 %	Q3 '06 %	Q4 '06 %	Q1 '07 %	Q4'07 %	Q2'08 %	Q4'08 %
Home	66	72	67	71	79	81	82
Work	36	34	35	38	38	34	24
School/college	12	15	18	19	14	15	13
Friends' houses	5	9	6	4	9	12	7
Cyber Cafes	4	8	9	4	7	8	6
Public library	3	5	3	3	7	7	3
On the move using portable equipment	2	2	2	2	2	4	3
Else where	1	2	2	-	2	2	1

- Home, and to a lesser extent , work remain the primary locations from where the Internet is accessed. Home access has increased marginally this wave.

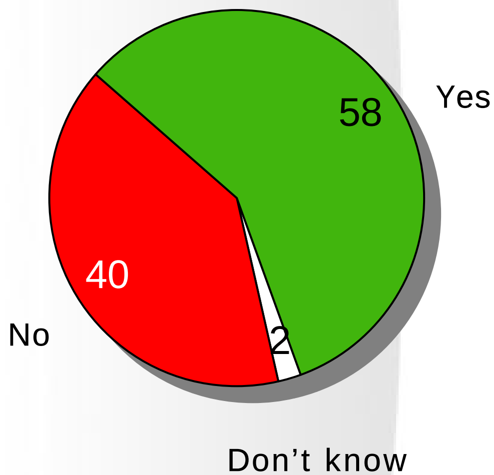
Base: All those who use the Internet from any location (n=668)

Commission for Communications Regulation

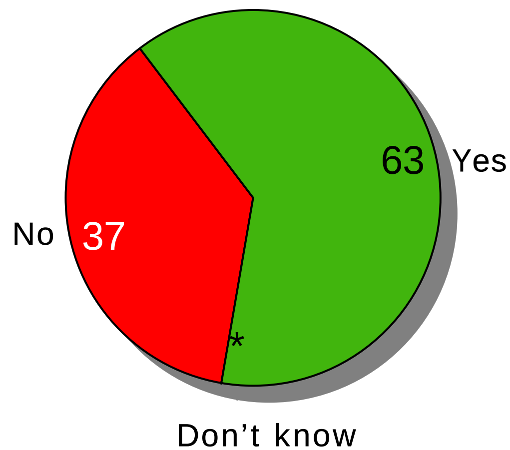
Home Internet Connection

Q. Do you currently have an Internet connection at home?

Internet Connection At Home Q2'08 %



Internet Connection At Home Q4'08 %



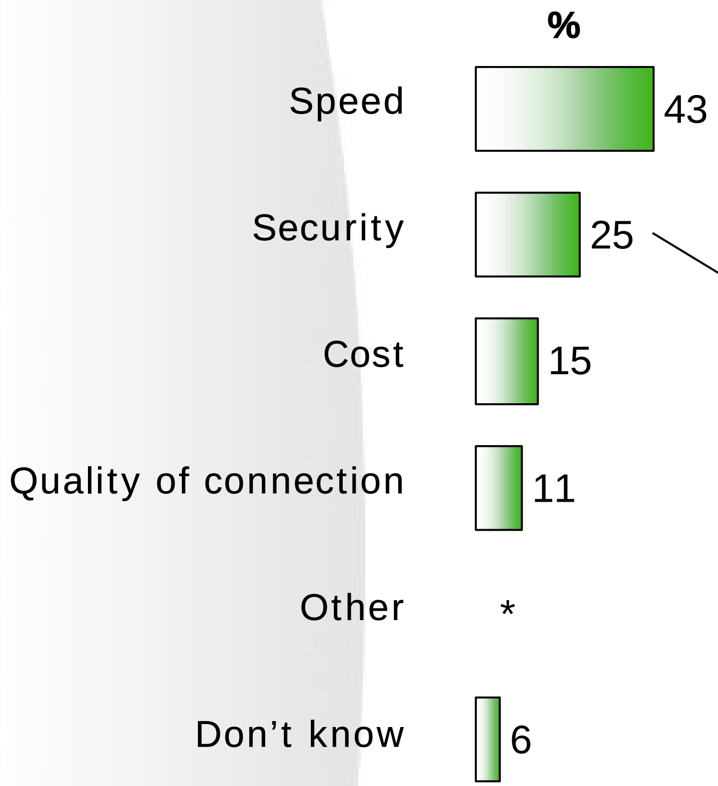
- Home access to the internet has risen, with nearly two in three having home internet access.
- Those most likely to have access were aged 15-24 (70%) and 35-49 (69%). ABC1s were significantly more likely to have access than C2DEs or the farming community (74% versus 57% and 43% respectively.
- Dublin residents (77%) are most likely to have access along with homeowners (65%) and those with a fixed line (73%).

Base: All Respondents (n=1002)

Most Important Factor When Using The Internet Is Speed

Commission for Communications Regulation

Q. What is the most important factor for you when using the internet?



Higher Among:	
Males	46%
15-24	65%
Rural residents	47%
Without fixed line in home	49%

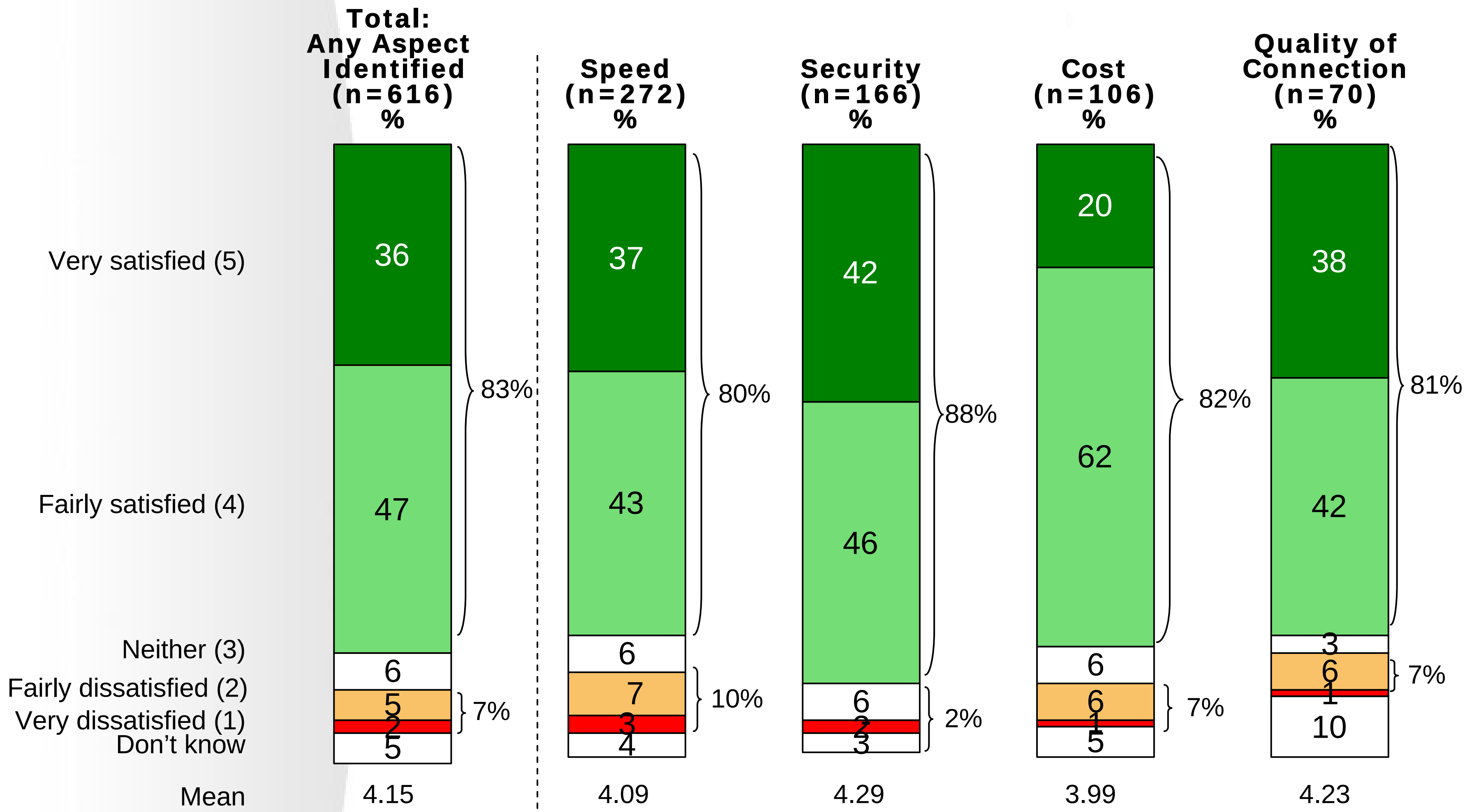
Higher Among:	
Females	28%
50-64	32%
Dublin residents	34%
Urban residents	32%

Base: All with home Internet connection (n=653)

High Levels of Consumer Satisfaction with ISP

Commission for Communications Regulation

Q. How satisfied are you with your current internet service provider in relation to this factor you have identified?

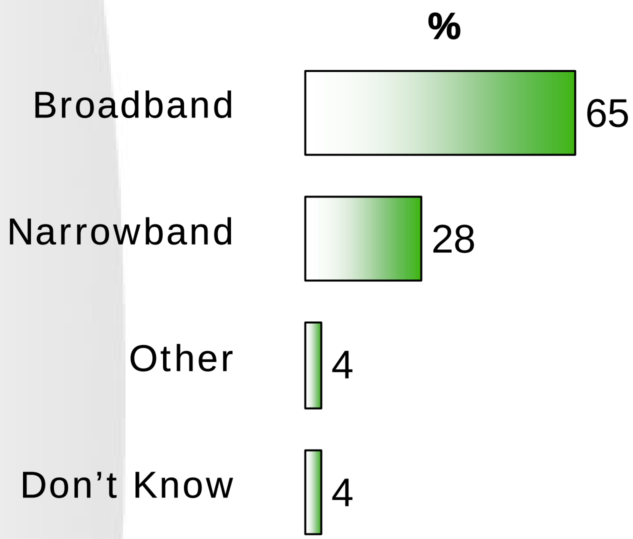


Millward Brown IMS

www.comreg.ie

Nearly Two Thirds With Home Internet Access Have Broadband

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



- At an overall level, 65% of those with Internet access claim to use a broadband connection, while 28% claim to have a narrowband connection; Just 4% claim they don’t know what type of connection they have.
- Platform splits are not available due to some definitional issues with the data

Base: All With Home Internet Access (n=653)

Home Internet Access Provider

Commission for Communications Regulation

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

	Q3 '06 %	Q4 '06 %	Q1 '07 %	Q4'07 %	Q2'08 %	Q4'08 %
Eircom	72	78	65	57	56	55
Access/Imagine/ Irish Broadband	6	4	6	8	6	1
BT Ireland/IOL (Esat)	3	2	4	7	6	6
Chorus/UPC	1	2	2	3	6	7
Perlico	1	3	3	6	5	4
Vodafone	-	-	-	1	3	4
Clearwire	-	-	-	3	2	3
O2	-	-	-	2	2	5
Digiweb	-	-	1	1	2	2
3 Ireland	-	-	-	2	1	5
Smart	-	-	-	-	-	1
Don't know	8	4	10	4	5	3
Other	4	4	3	3	2	3

- Eircom's share has declined marginally to 55%.
- Mobile operators have increased their share.

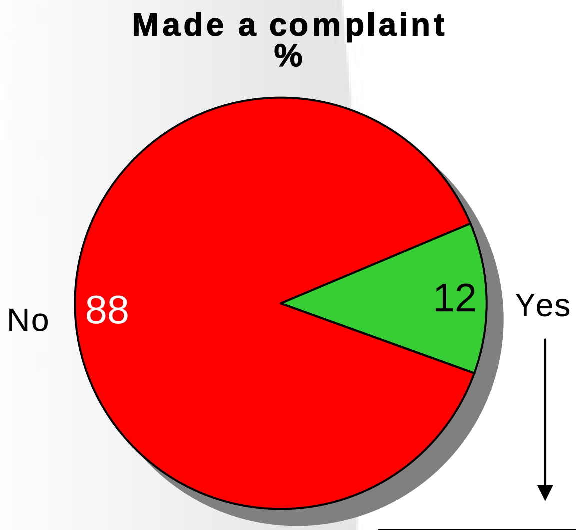
Response <1% not shown

Base: All With Home Internet Access (n=653)

Complaints Made About Internet Connection In The Last 12 Months

Commission for Communications Regulation

Q. Have you made a complaint to your internet service provider in the last 12 months?
Q. How satisfied were you with the response you received from your Internet Service Provider?



More likely to be:

ABs	15%
Leinster	16%

Base: All with Home Internet connection (n=653)

Base: All Who made complaint (n=78)

Millward Brown IMS

www.comreg.ie

Download Speeds

Commission for Communications Regulation

Q. What is the contracted download speed of your home broadband package? That is, what speed package are you paying for?

	Q4'07 %	Q4'08 %	
Less than 512 kilobytes per second	2	1	
512 kilobytes per second	2	2	
1 mega byte per second	10	11	22%
2 mega byte per second	12	11	
3 mega byte per second	6	9	20%
4 mega byte per second	6	4	
5 mega byte per second	6	3	
6 mega byte per second	3	4	
More than 6 megabytes per second	3	3	
Don't know	51	50	

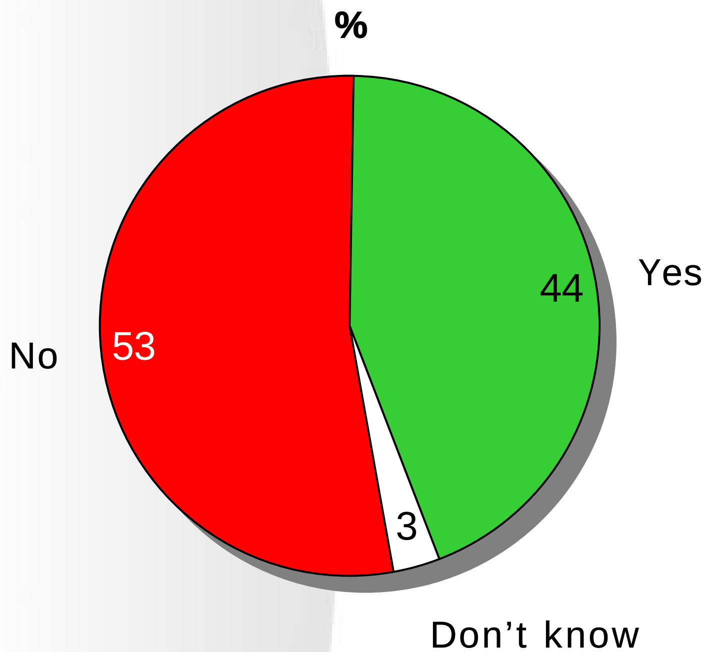
- There is a lack of awareness of broadband speeds among those with a broadband connection, as half of those with home broadband access are unable to tell what speed they are offered from their provider.
- There is little change in the pattern of contracted speeds offered compared to Q4'07. Twenty two percent of those with broadband access claim to have between a 1 and 2 Mbps connection, while a further 20% state that their broadband connection speed is between 3 and 6 Mbps.

Base: All Those With Home Broadband Access (432)

Awareness Of VOIP

Commission for Communications Regulation

Q. Have you heard of Voice over Internet Protocol (VoIP) or Internet telephony, whereby you can use your Internet connection to make voice calls? (e.g. Skype)



- Those most likely to be aware of VoIP, were Male (47%), those aged 18-24 (60%), ABC1 (56%, with 61% of ABs) and Dublin Residents (57%).
- Awareness is higher also among broadband users (68%) and those availing of Bundled Services (62%).

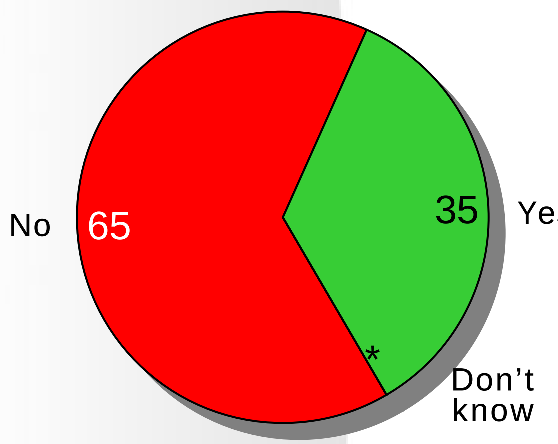
Base: All Respondents (n=1002)

Use of VOIP

Commission for Communications Regulation

Q. Have you ever used a VoIP service to make a call over the Internet?
Q. Have you made a call using a VoIP service in the last 12 months?

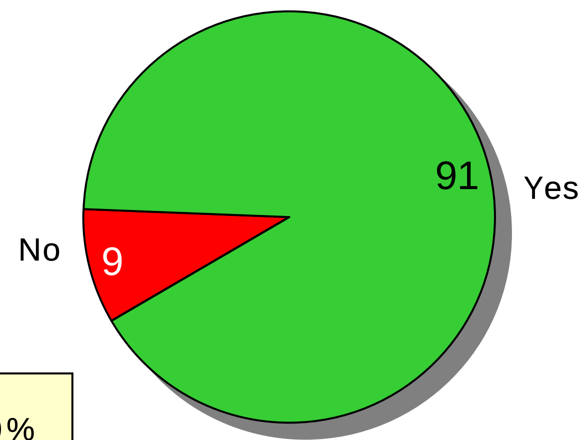
Ever used VoIP
%



More likely to be:

18-24	40%
ABC1s	39%
Dublin	41%
Broadband Customers	42%

Made a VoIP call in last 12 months
%



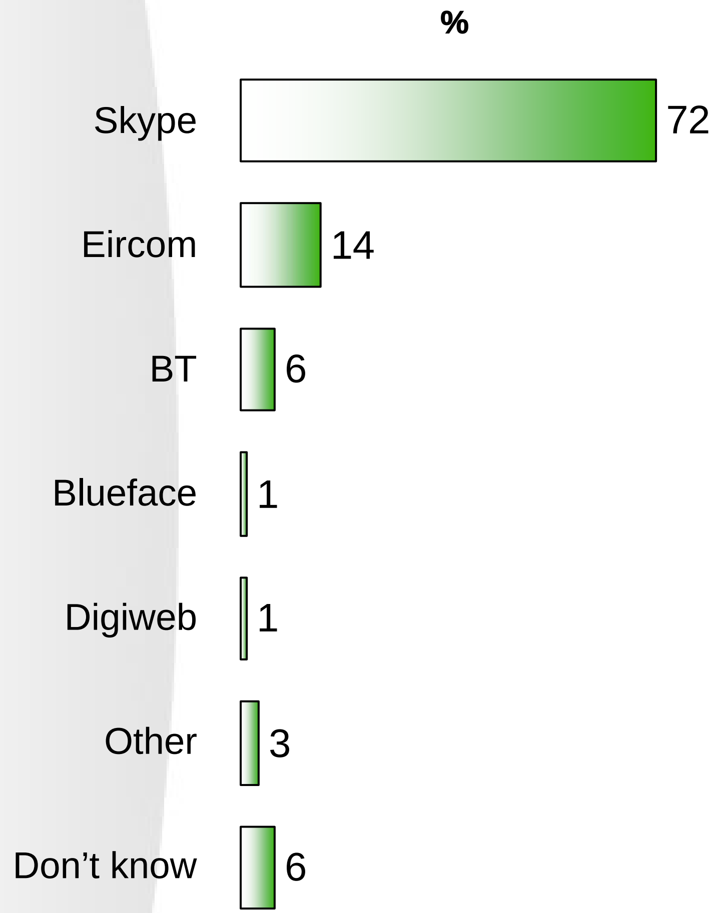
Base: All who have heard of VoIP (n= 453)

Base: All who have used VoIP (n= 162)

Skype Most Used VOIP Provider

Commission for Communications Regulation

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



- Skype is the main provider used for making VoIP calls, with 72% of those who have used VoIP saying that they used this provider.
- Skype is used more by those living in Dublin (81%).

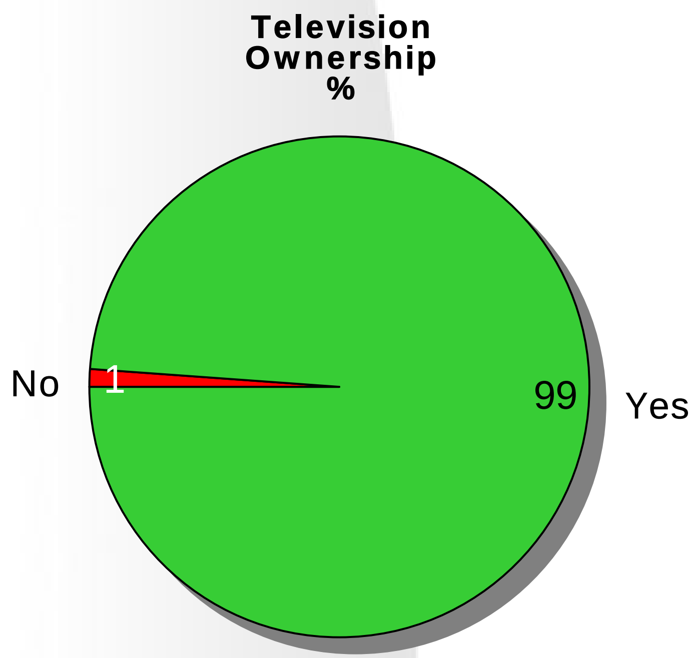
Commission for
Communications Regulation

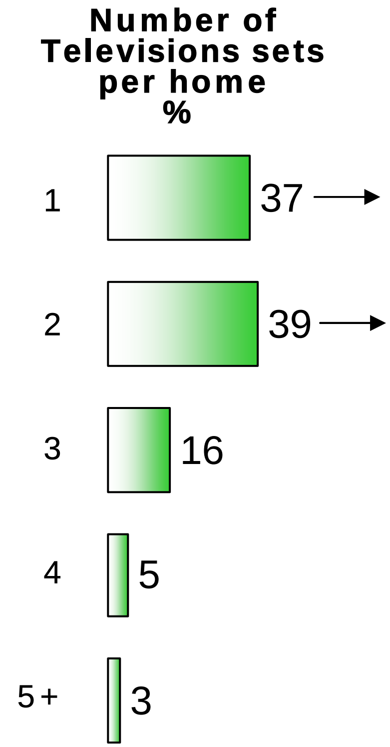
BROADCASTING

Number Of Televisions Owned

Commission for Communications Regulation

Q.	Do you have access to a Television in your home?
Q.	How many TVs do you have in your home?





Higher Among:

DEs	44%
Living in Munster	41%
Living in Rented Acc	51%

Higher Among:

50-64	45%
Fs	44%
Living in Conn/Ulster	42%

Mean 2.02

- There is near universal ownership of televisions in Ireland, with the average number of television sets per house being just over 2.
- Nearly a quarter of households have 3 or more television sets.

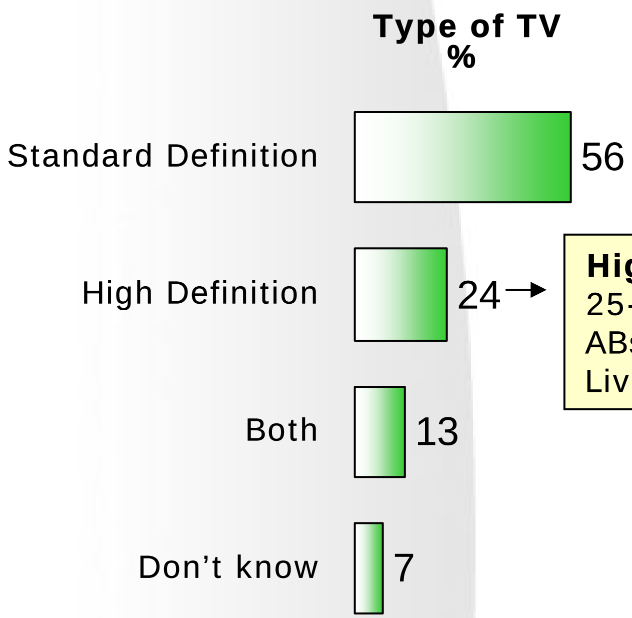
Base: All Respondents (n=1002)

Base: All with TV (n=993)

Commission for Communications Regulation

Types Of Televisions Owned And PVR Ownership

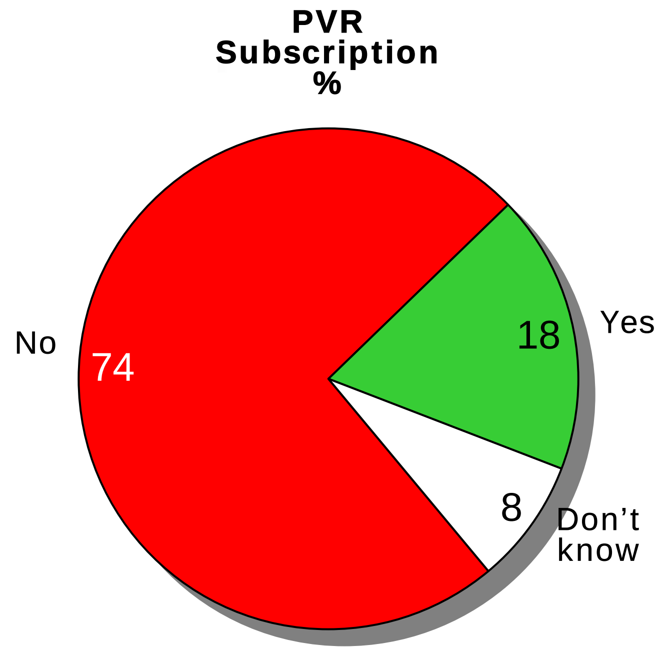
Q. What type of TV do you own?
Q. Do you subscribe to a PVR (personal video recorder) from your TV service provider



Higher Among:

25-34	31%
ABs	29%
Living in Conn/Ulster	35%

Base: All Respondents (n=1002)



Base: All with TV (n=993)

- The majority of those with access to televisions still have standard definition television sets (56%) – rising to 63% among younger respondents (18-24) and those in the 65-74 age bracket (64%)

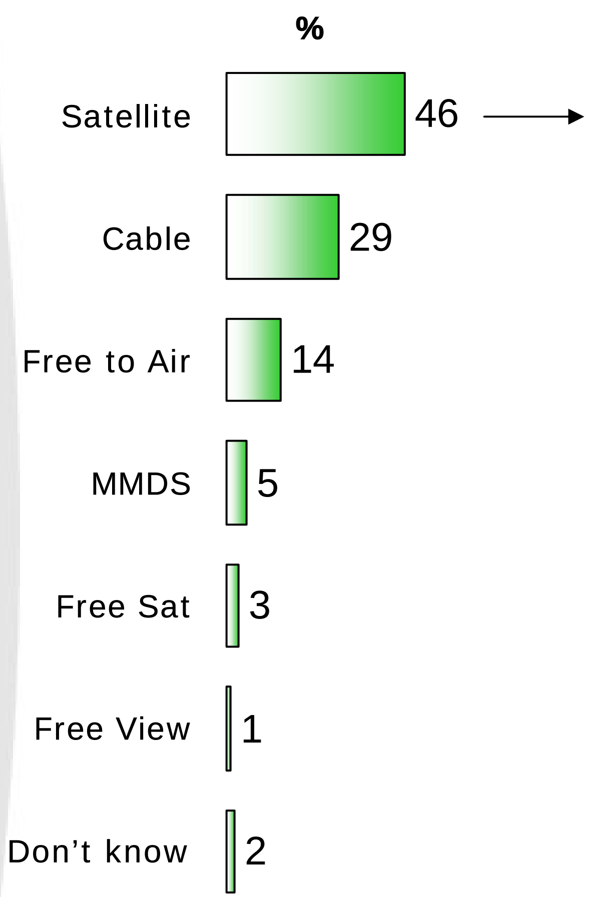
- Nearly one in five of those with a television (18%) subscribe to a PVR. This is higher among 25-34 year olds (23%), those in the AB social class (26%) and those living in Dublin(23%).

- Instances of subscribing to PVR also appear higher among those who used VoIP (30%), have a PC and Internet access at home (22% and 23% respectively) and those who subscribe to a bundled service (28%).

8% of those with a TV have a HDTV and a PVR

Access To TV Programmes

Q. How do you access your TV programmes?



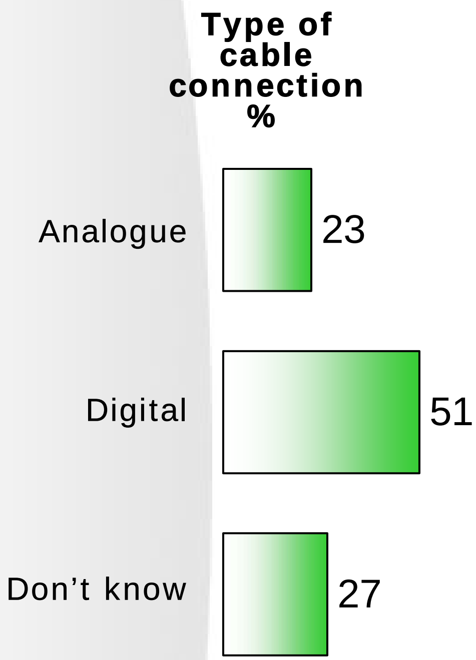
Higher Among:	
25-34	60%
ABC1s	54%
Living in Rest of Leinster	57%
Broadband subscribers	54%
Recent VoIP usage	60%
Subscribe to Bundle	50%

Base: All with TV in home (n=993)

Commission for Communications Regulation

Over Half Of Cable Users Are Digital

Q. Do you have analogue or digital cable?



- Over one in four cable users (27%) are unsure of the type of cable connection that they subscribe to, while over half of those with cable (51%) claim to have a digital connection.
- Those with a broadband connection (67%) or who subscribe to a bundled service (60%), are more likely to be digital cable subscribers.

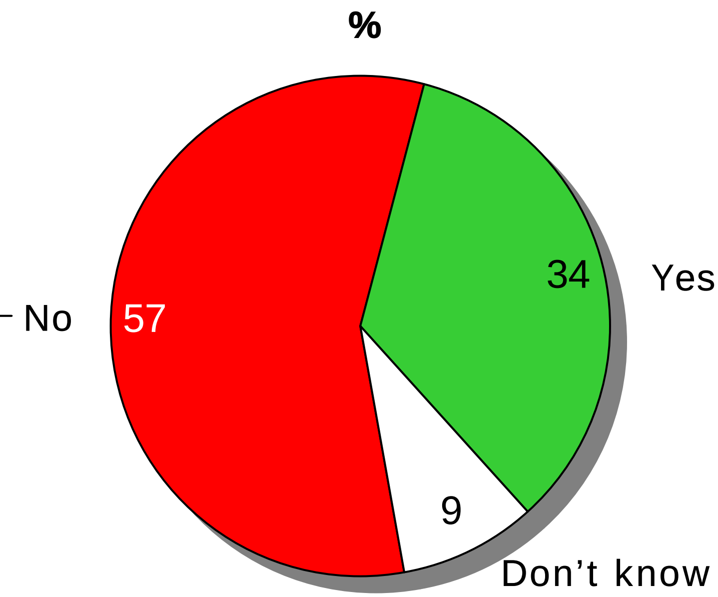
Base: All cable users (n=283)

Commission for Communications Regulation

Just Over One Third Are Aware Of Analogue TV Broadcasting Switch Off

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

Higher Among:	
Females	61%
15-24	64%
65-74	64%
DEs	66%
Living in Dublin	64%
No PC at Home	64%
No Home Internet	65%



- Just over one third of all respondents are aware of the impending analogue switch off.
- Awareness is more pronounced among males (39%), the farming community(41%), and those with Internet connection at home (40%).
- Those with broadband (42%), who have used VoIP in the last 12 months (43%) and those who subscribe to a bundled service (45%), are also more likely to be aware of the switch off.

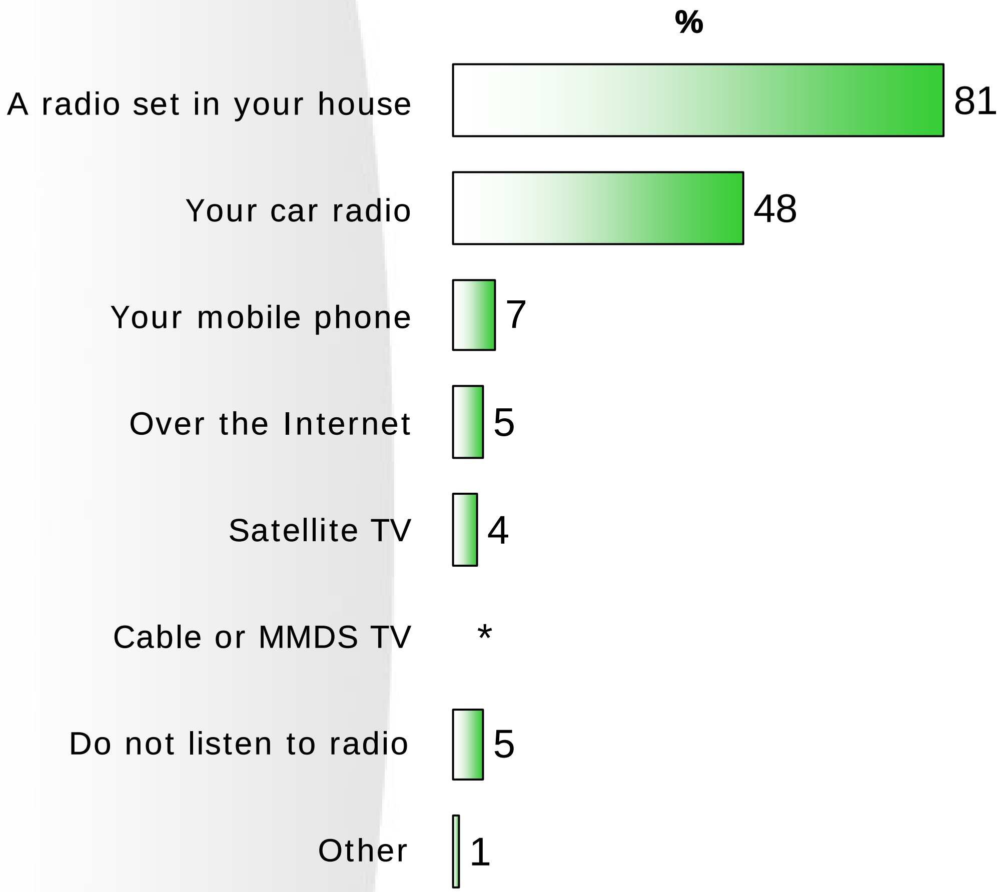
Base: All Respondents (n=1002)

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

Most Listen To Radio Via Radio Set At Home

Commission for Communications Regulation

Q. Which, if any, of the following do you use to listen to the radio?



Base: All Respondents (n=1002)

- Over eight in ten (81%) listen to the radio via a radio set in their home, while nearly half (48%) also listen to their car radio.
- Responses indicate low usage of radio over newer technologies e.g. over the Internet or via satellite TV.

Commission for
Communications Regulation

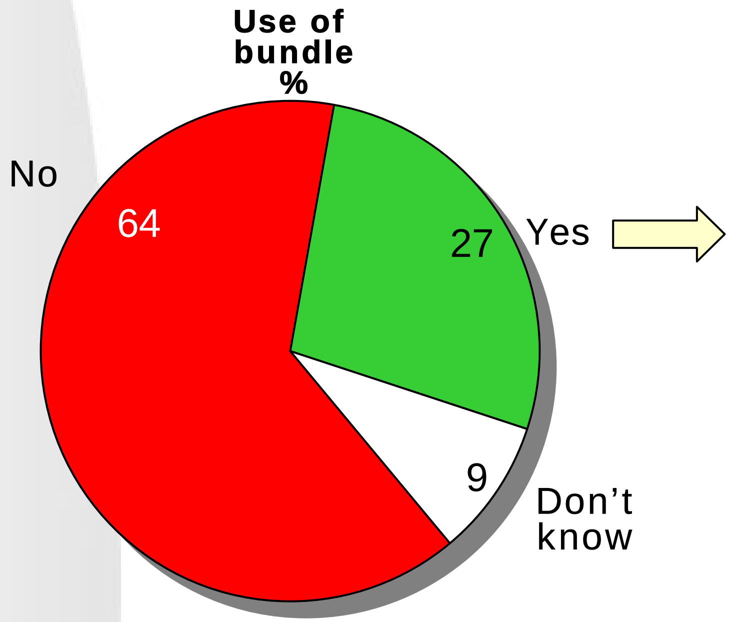
Bundled Services

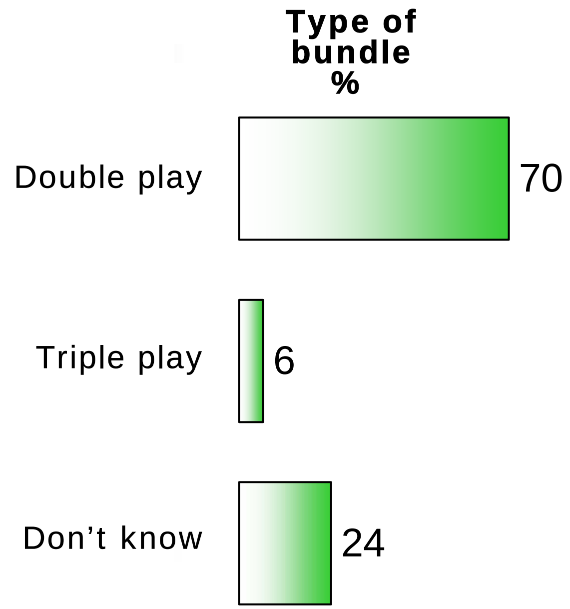
41108054 JMM/PM/SB

www.comreg.ie

Use Of Bundled Services

Q. Do you subscribe to a bundled package from your service provider?
Q. What type of bundled package do you subscribe to?





- Nearly two thirds of respondents do not use a bundled service, this is higher among those aged 65-74 (72%), those living in the farming community (78%), living in a rural area (72%) and those living in the Rest of Leinster (69%).
- Those with no fixed line (82%), no home PC (88%) and no home Internet (89%) were also less likely to subscribe to a bundled package.

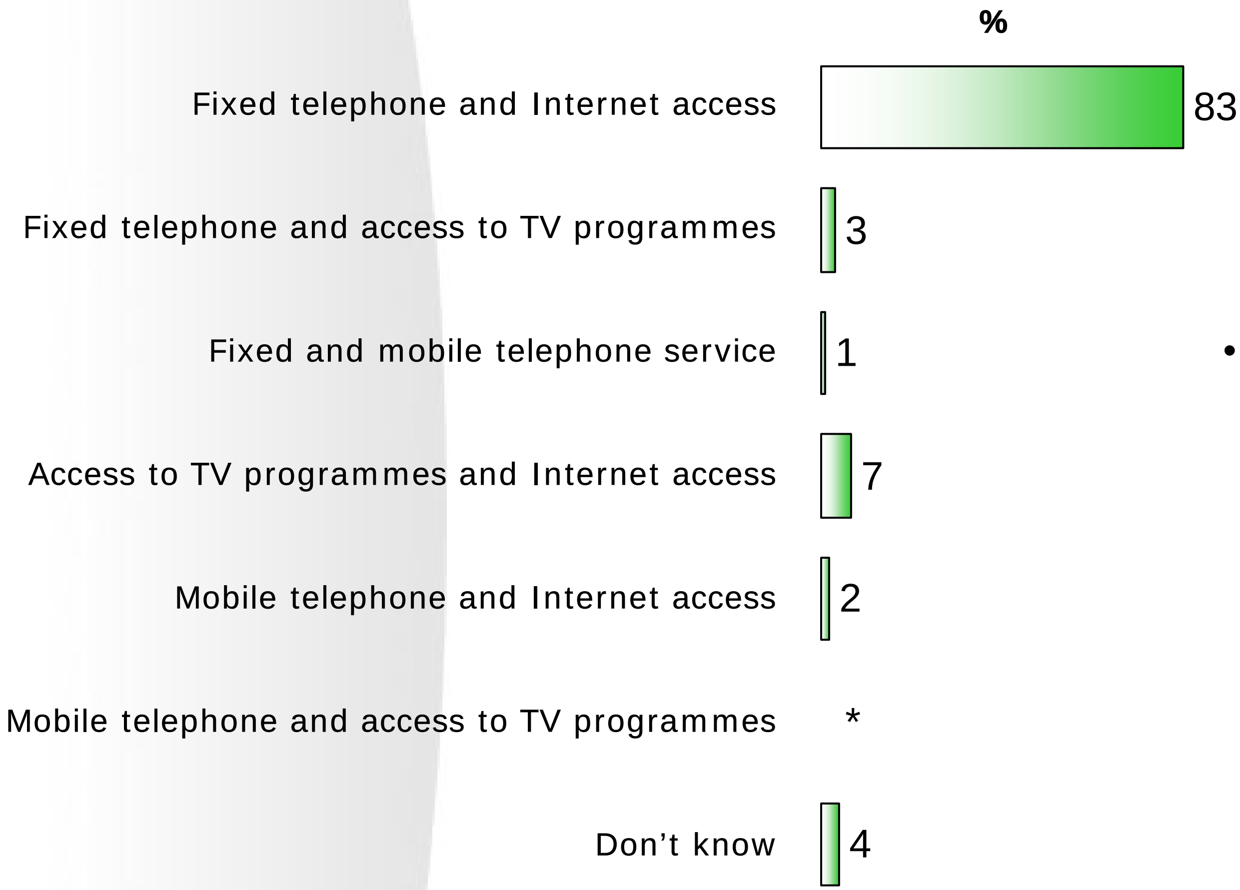
- While about a quarter of those subscribing to a bundle (24%) are unsure of the type of bundle they are subscribed to, the majority claim to subscribe to a double play bundle (70%).
- This rises to 77% among C2s and 80% among those living in Connaught/Ulster.

Base: All Respondents (n=1002)

Base: All subscribing to bundled package (n=290)

Double Play Composition

Q. What individual services make up your double play bundle?



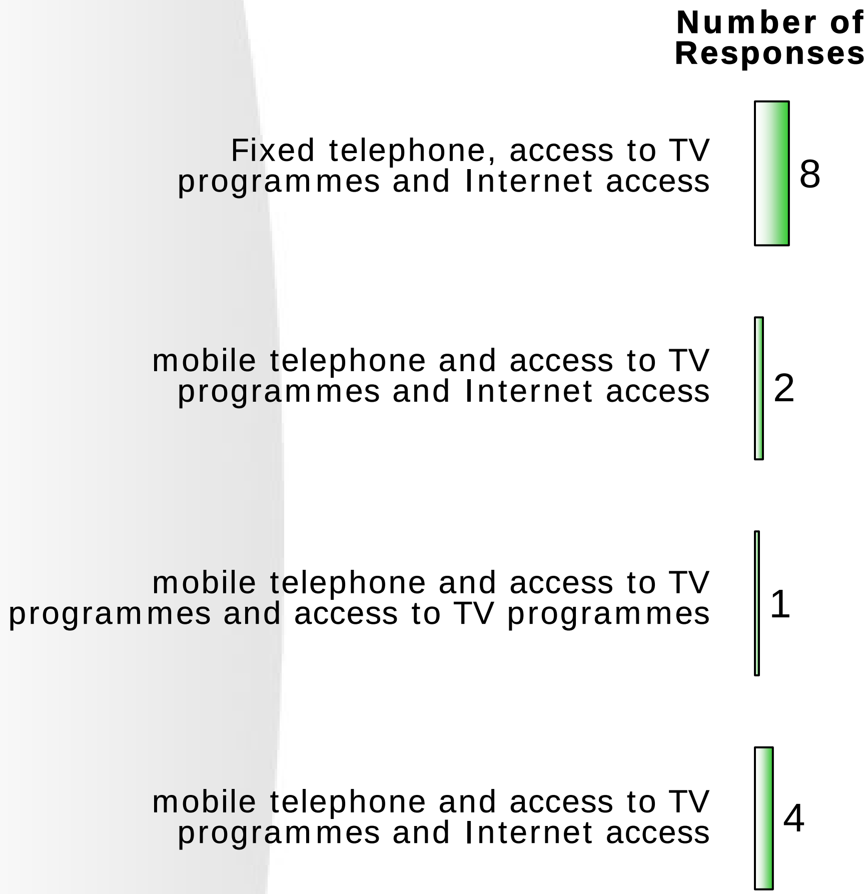
Base: All with double play bundle (n=203)

- By far the most popular double play bundle is fixed telephone and Internet access (83%), particularly those living in rural areas (94%).

Commission for Communications Regulation

Triple Play Composition

Q. What individual services make up your triple play bundle?



Base: All with triple play bundle (n=17*)

*Caution small base size

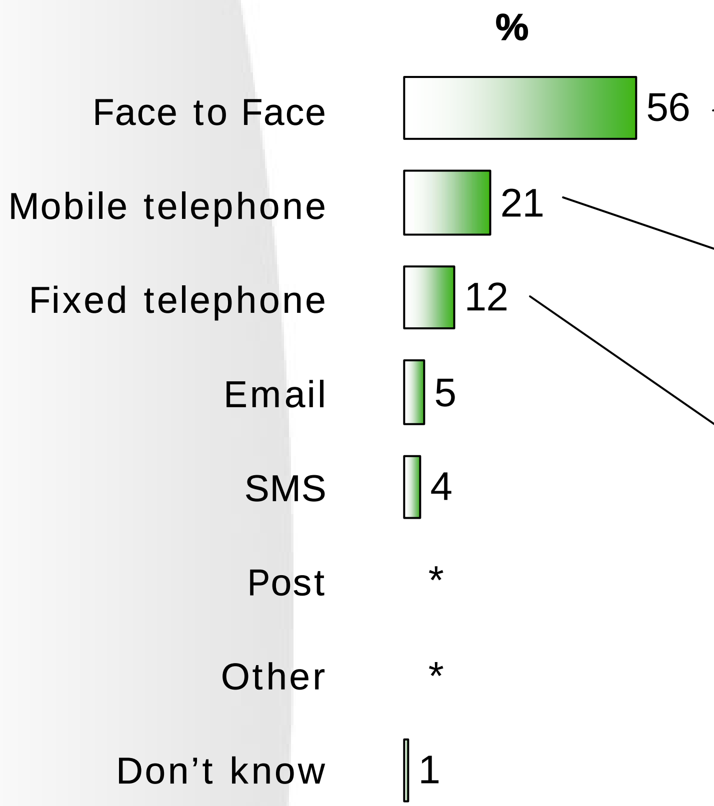
Commission for
Communications Regulation

ATTITUDES TO TECHNOLOGY

Preferred Method Of Communication

Commission for Communications Regulation

Q. Which **ONE** of the following methods of communication do you generally prefer to use?



Higher Among (Face to Face)

50-64	70%
65-74	71%
F	75%
Live in Conn/Ulster	68%
Rural	62%
No Internet Access	63%
No Home PC	65%

Higher Among (Mobile telephone)

15-24	33%
Students	30%
Dublin	29%
No fixed line	27%
Recent VOIP usage	30%
Mobile phone only	29%

Higher Among (Fixed telephone)

65-74	24%
AB	18%
Homemaker	20%
Subscribe to Bundle	18%

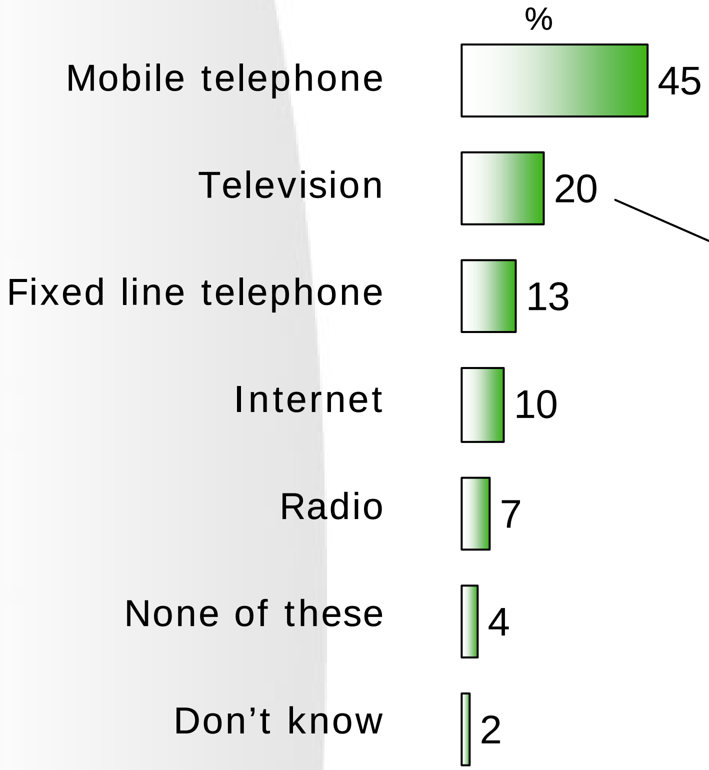
- Despite the availability and advances in communication technologies, respondents are more likely to claim preference for face to face contact than any other form of communicating.
- However, of the communications technologies chosen, the mobile phone is the preferred technology with about one in five people preferring this as a method of communicating.

Millward Brown IMS

Base: All Respondents (n=1002)

Mobile Phone Is Main Communications Device Users "Could Not Live Without"

Q. Which **ONE** of the following communications devices/services do you feel you could not live without?



Higher Among	
15-24	64%
C2s	56%
Students	63%
Live in Dublin	52%
Live in Rest of Leinster	50%
No Fixed Line	57%
Have Broadband	50%
Recent VoIP usage	50%
Mobile only users	60%

Higher Among	
65-74	38%
DEs	27%
Live in Munster	34%
No home PC	30%
No Internet access	28%

- The mobile phone is the main communications device that 45% of respondents claim they would could "not live without".
- The next most "essential" rated communication device is the television with one in five saying they could not live without it.
- A relatively low percentage of respondents (13%) place importance on having a fixed line, while there is even less attachment to internet access with only 10% claiming not to be able to live without it.

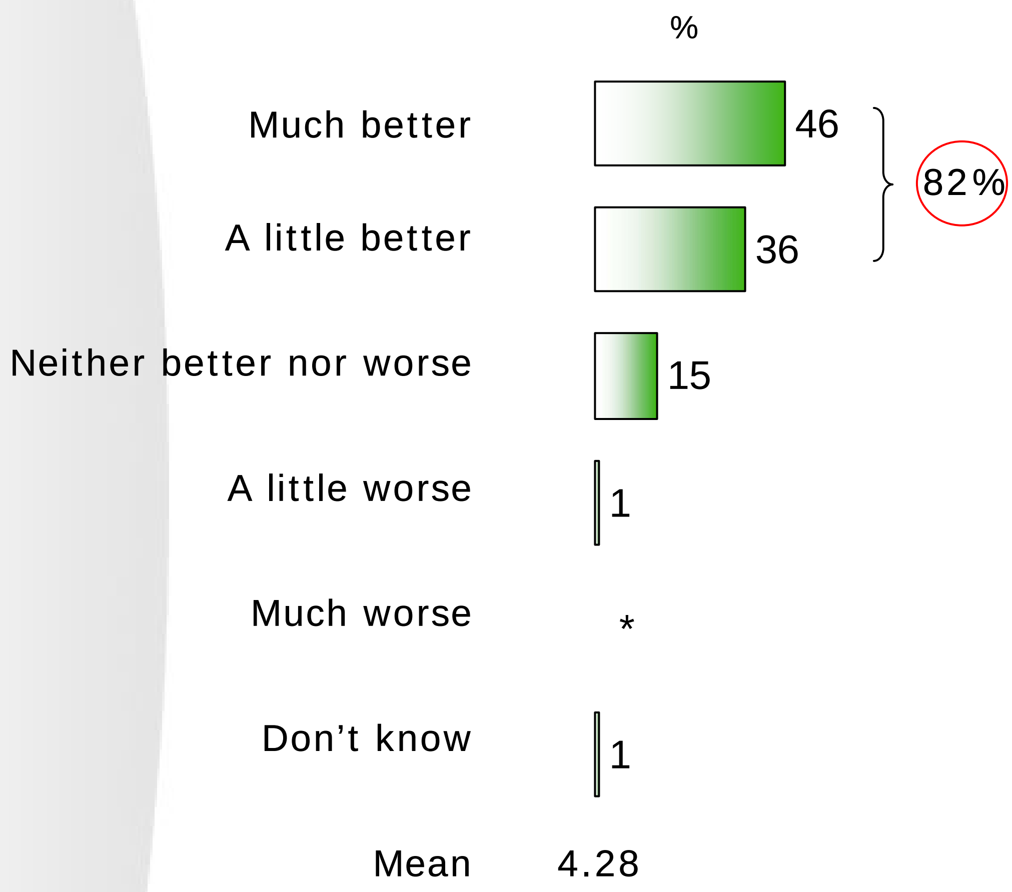
Millward Brown IMS

Base: All Respondents (n=1002)

Commission for Communications Regulation

Impact Of Technologies On Quality Of Life Generally Seen As Positive

Q. Overall, would you say that technologies like mobile phones, the Internet, TV, radio and games consoles have made the quality of your life....

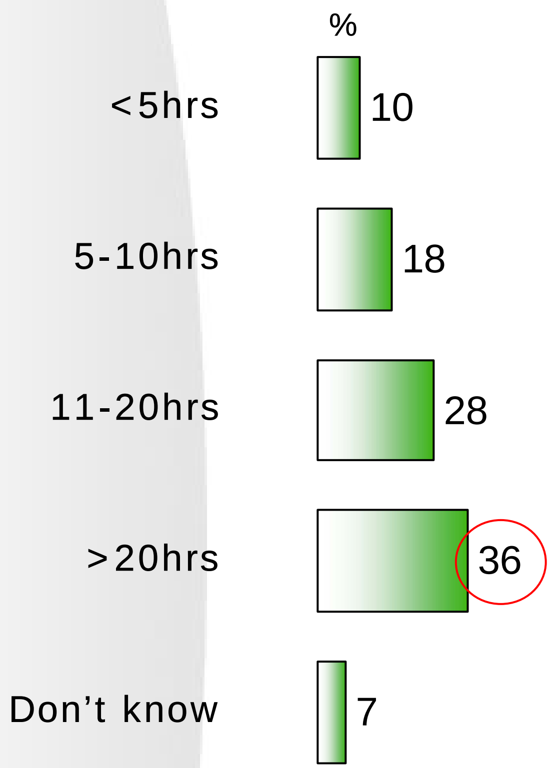


Base: All Respondents (n=1002)

Commission for Communications Regulation

Time Spent Using Technology For Leisure Purposes

Q. In a typical week, approximately how many hours do you spend using technology (mobile phone, home internet, music, TV, games consoles) for **leisure purposes**?



Mean 21.85

Higher Among:

AB	45%
Students	47%
Live in Rest of Leinster	44%
Internet access	40%
Ever used VoIP	51%

- The average number of hours claimed to be spent using technology for leisure purposes by all respondents is 21.85, or 13% of each week. Over a third of respondents (36%) spend more than 20 hours a week using technology for leisure purposes.

Millward Brown IMS

Base: All Respondents (n=1002)

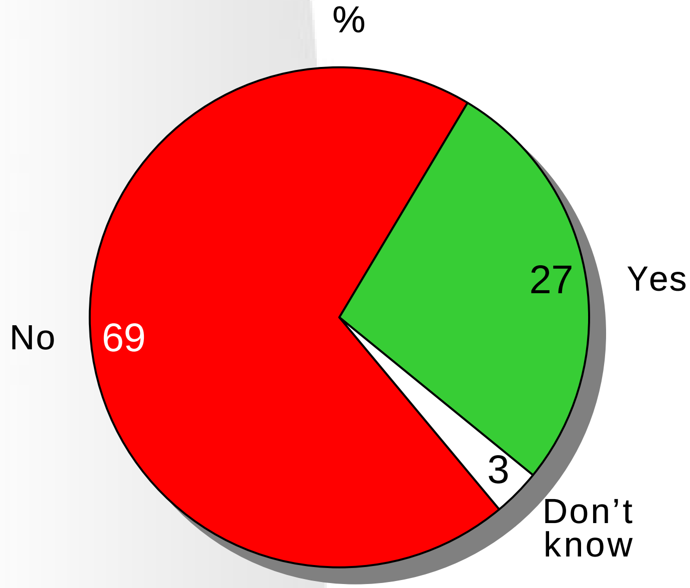
Commission for
Communications Regulation

Awareness of ComReg

Awareness Of ComReg's Role With Regards To Complaints

Commission for Communications Regulation

Q. Are you aware that you can contact ComReg with regards to complaints that you have not been able to resolve with any of your fixed line phone, mobile phone, or internet service providers?



Higher Among:

Use Fixed Line Phone	30%
Have Internet Access	34%
Have Broadband	37%
Subscribe to Bundle	38%

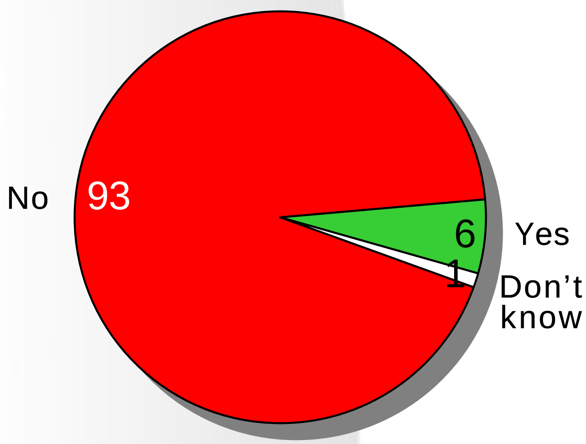
Base: All Respondents (n=1002)

Low Levels Of Contact Made With ComReg Regarding Complaints With Operators

Commission for Communications Regulation

Q. Have you contacted ComReg in the last 12 months with regard to complaints that you have not been able to resolve with any of these service providers?
Q. How satisfied were you with the outcome of this contact?

Contacted ComReg
%



Satisfaction with Response
(Number of Respondents)

- While only a very small number of respondents contacted ComReg, those who did were generally satisfied with the outcome of the contact.

Base: All aware of ComReg's Complaint Handling role (n=281)

Base: All contacted ComReg (n=18*)
*Caution: Small base size

Commission for
Communications Regulation

CONCLUSIONS

CONCLUSIONS - I

Commission for Communications Regulation

- Mobile phone ownership is virtually universal, with over nine in ten claiming to own one. Ownership of a Fixed Line phone has remained static over the last two years - the decline in ownership has relented somewhat over the most recent studies.
- Eircom remain the primary provider in terms of market share of fixed lines, and there has been no significant movements among other providers in terms of market share. The average fixed line bi-monthly bill has increased marginally.
- One in eight fixed line users have made a complaint over the past 12 months, and of those, just over half expressed satisfaction with the outcome of the complaint.
- In terms of mobile phone customer profiles, there has been an increase in the proportion of Pre-Pay customers relative to Post-Pay customers. Four in every five customers now claim to be a Pre-Pay mobile phone customer.
- A large majority of mobile phone owners claim they have just one handset (90%) and one active SIM card (88%)
- The monthly spend on mobile phones continues to decrease.
- Less than one in ten mobile customers has complained to their service provider over the past 12 months, and of those who complained, two thirds were satisfied with the outcome.

CONCLUSIONS - II

Commission for Communications Regulation

- A large minority (43%) claim to use their mobiles more for voice calls than for SMS, with a further 25% of mobile phone owners dividing their usage equally. Younger respondents use their mobile more for SMS while older people are more likely to make a voice call.
- Among those who have seen a shift in their mobile phone usage, most state that this represents an increase in usage.
- There is limited awareness regarding both the previous EU ruling on capping roaming (voice) charges, and also towards the proposed capping of roaming SMS charges.
- The incidence of owning a PC/laptop has increased slightly. There has been a more noticeable increase among those accessing the internet, with 64% now claiming to do so. A large majority of those using the internet access it at home while there has been a significant increase in home internet penetration.
- The most important factor when using the internet is speed, followed by security and to a lesser extent, cost. However, among broadband users, half are unaware of their contracted download speed.
- There seems to be a uniform degree of unawareness among those with home internet connections as to the actual type of connection they have.
- Over half use Eircom as their ISP, but the proliferation of other ISPs used is striking. The use of mobile broadband providers have shown some gains. One in eight Internet users have made a complaint to their ISP over the past 12 months, with over half being satisfied with the outcome.

CONCLUSIONS - III

Commission for Communications Regulation

- Nearly half (44%) of respondents claim to be aware of VoIP, with over one third of those having used it; the vast majority having done so in the past 12 months.
- Television ownership is almost universal, with an average of two televisions per household. Four in five have a standard definition TV, with 37% having a having a high definition television. Nearly one in five claim to subscribe to a PVR service. A large minority access their TV programmes via satellite, followed by cable and free-to-air.
- Over half of those who use cable claim to have a digital cable connection, compared to nearly a quarter with an analogue connection. However, just one in three are aware of the switchover from analogue to digital in 2012.
- Over one in four of all respondents subscribe to a bundled package from their service provider, with the majority of those customers opting for a double play package. By far the most popular bundle is fixed line telephone coupled with Internet access.
- Overall, nearly 22 hours are spent per week using technology for leisure purposes.
- The mobile phone is the preferred communication device, with nearly half saying they could not live without it, followed by one in five preferring the television, one in eight opting for a fixed line and one in ten choosing the internet.
- Overall, the vast majority consider that technologies such as mobile phones, the Internet, radio and games consoles have improved their quality of life.