An Coimisiún um
Rialáil Cumarsáide
Commission for
Communications Regulation

Ireland Communicates Survey 2017

Consumer Survey

ComReg 18/23a

Five Key Findings

1. Large differences in ICT service usage exist across the population. This is most evident for fixed broadband services, with almost three-quarters in urban areas having a broadband service in their home compared with 58% of those living in rural areas.

2. Generally high satisfaction with service providers, and coupled with low awareness of price benefits from switching means that intention to switch providers remains low.

3. High levels of awareness of the removal of roaming charges, with many having used this facility since it was introduced.

4. Newer technologies such as instant messaging apps and streaming services are more likely to be supplementing consumer usage of traditional services (SMS and live TV) rather than replacing them.

5. Consumers expect their usage of "smart" technologies to increase over the coming few years. While less than a third currently have a Smart TV, the majority expect that they will own one in five years time. Similar anticipated increases are evident for smart heating and other devices.

Contents

Introduction & Methodology

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Introduction & Methodology

- The Commission for Communications Regulation (ComReg) commissioned Ipsos MRBI to undertake surveys among a representative sample of consumers. Fieldwork was conducted between 2 November and 20 December 2017.
- The objective of the research is to provide an understanding of consumer usage of telecommunications services (landline, mobile phone, fixed broadband, mobile broadband and television services). It also explores current and anticipated future use of various technologies.
- Surveys were conducted with a total of 1,519 respondents. Interviewing quotas were set for age, gender and social class.
- For the purposes of ensuring robust analysis and comparisons between urban and rural areas, the sample was split evenly between three segments of differing population density (see next slide for details). Data was subsequently reweighted to ensure it was aligned with the national population.
- Interviews were conducted in-home using a CAPI approach (Computer Assisted Personal Interviewing).
- Interviews were conducted with the person responsible/ jointly responsible for telecommunication decision making within the household.
- Where questions and answer options were identical or very similar, comparisons were made with the findings from the 2013 and 2015 ICT Tracker Surveys.

Introduction & Methodology

	Urban	Semi-Rural	Rural
Population density	>100 per Sq. Km	<100 and >25 per Sq. Km	<25 per Sq. Km
Number of Electoral Divisions	789	1,205	1,489
Total population	2,899,576	1,158,294	530,382
Number of interviews	504	511	504

- Survey in Nov/Dec 2017
- Each Electoral Division was classified as Urban, Semi-Rural or Rural
- A sample of Electoral Divisions were selected within each category, and interviewing was conducted within these areas
- Data was subsequently reweighted to reflect the distribution of the total population across these categories

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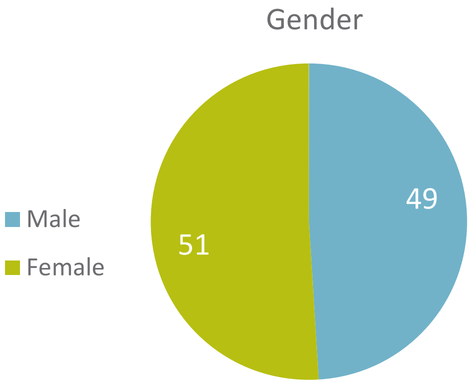
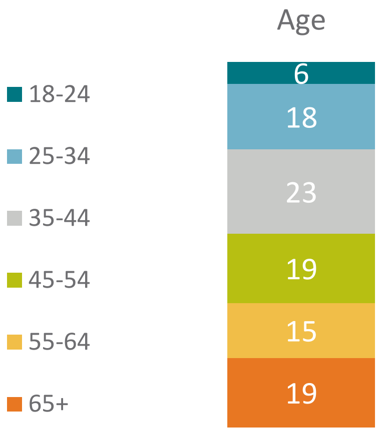
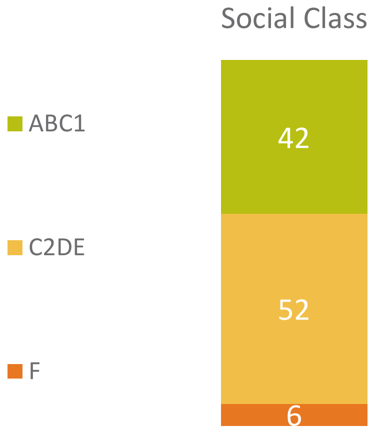
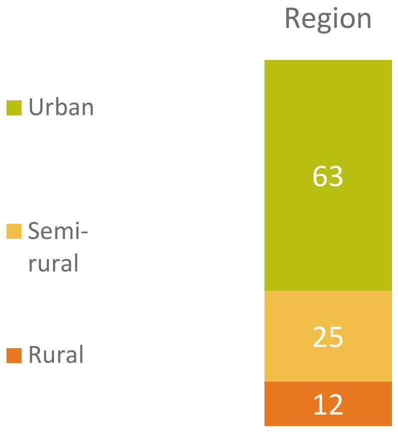
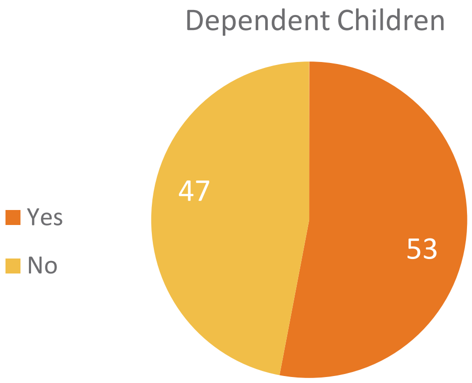
Profile of Sample (Weighted)

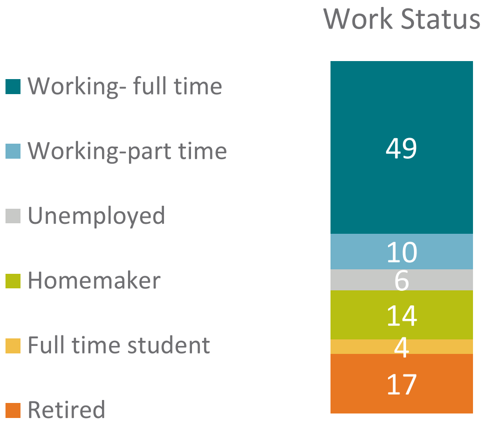


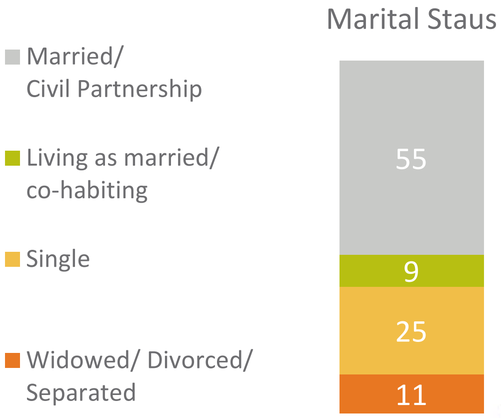












Base: 1,519

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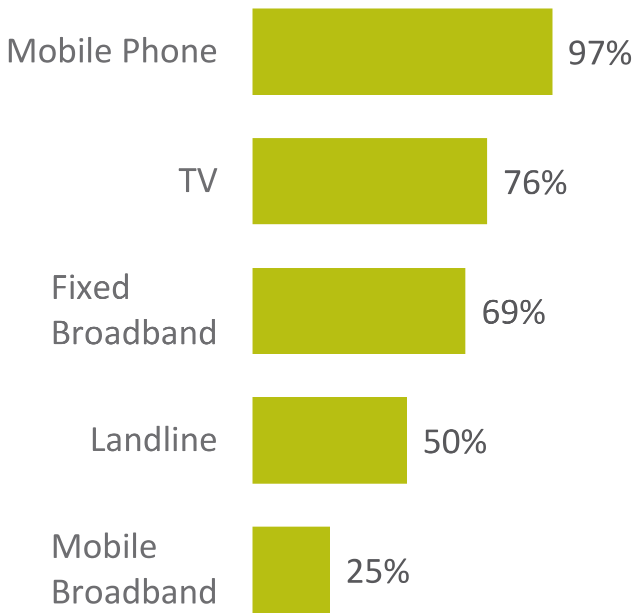
Telecoms Usage

Notable differences in ownership of many services across age, social class and regions. While 73% of those in urban areas have fixed broadband, this declines to 58% of those in rural areas.

Services Used

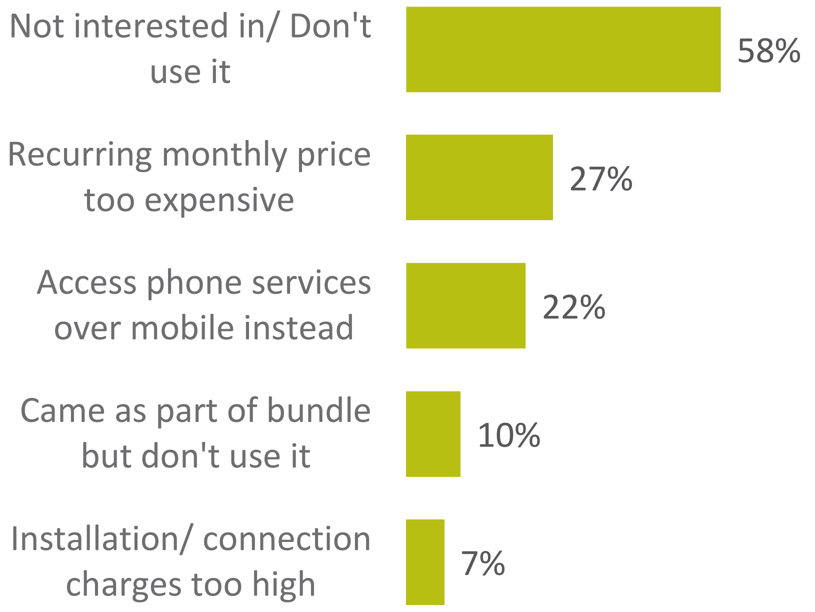


	Age				Social Class			Region		
	18-34	**35-54**	**55-64**	**65+**	**ABC1**	**C2DE**	**F**	**Urban**	**Semi-Rural**	**Rural**
	% (356)	% (606)	% (235)	% (322)	% (637)	% (722)	% (160)	% (504)	% (511)	% (504)
Mobile Phone	100	99	99	88	99	96	90	98	96	96
TV	67	82	78	71	81	72	72	76	75	78
Fixed Broadband	70	80	61	50	83	60	48	73	64	58
Landline	31	47	58	74	59	41	69	50	52	47
Mobile Broadband	32	27	24	10	31	21	12	26	19	26

Q.1a Which of the following telecommunications/broadcasting services do you currently have access to in your home?
Base: 1,519

Most of households with no landline service claim it is because they are not interested in the service

Main Reasons for Not Having Landline Access



	Age				Social Class			Region		
	18-34	35-54	55-64	65+	ABC1	C2DE	F	Urban	Semi-Rural	Rural
	% (240)	% (326)	% (98)	% (82)	% (273)	% (422)	% (51)	% (244)	% (244)	% (258)
Not interested in/ Don't use it	64	59	47	48	58	58	63	55	65	59
Recurring monthly price too expensive	23	25	33	41	21	30	29	26	28	27
Access phone services over mobile instead	18	22	27	27	21	22	27	21	17	38
Came as part of bundle but don't use it	11	12	12	3	11	11	3	14	5	3
Installation/ connection charges too high	6	7	12	2	7	7	3	6	8	6

*Only mentions over 5%

Q.2a Why do you currently not have access to a Home Landline telephone in your home?
Base: 746

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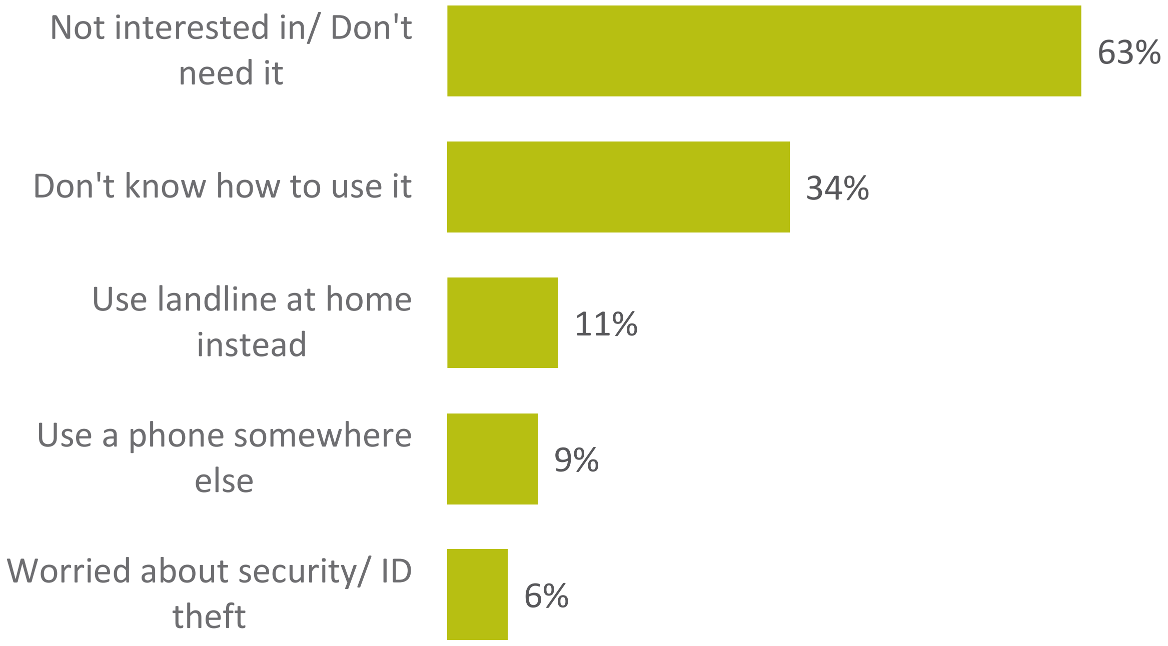
Typically those with no mobile phone service indicate that it is because they are not interested in it

Main Reasons for Not Having Mobile Phone Access



*Only mentions over 5%

** Insufficient number of respondents to facilitate further breakdown of responses.

Q.2b Why do you currently not have access to a Mobile Phone service in your home?
Base: 51

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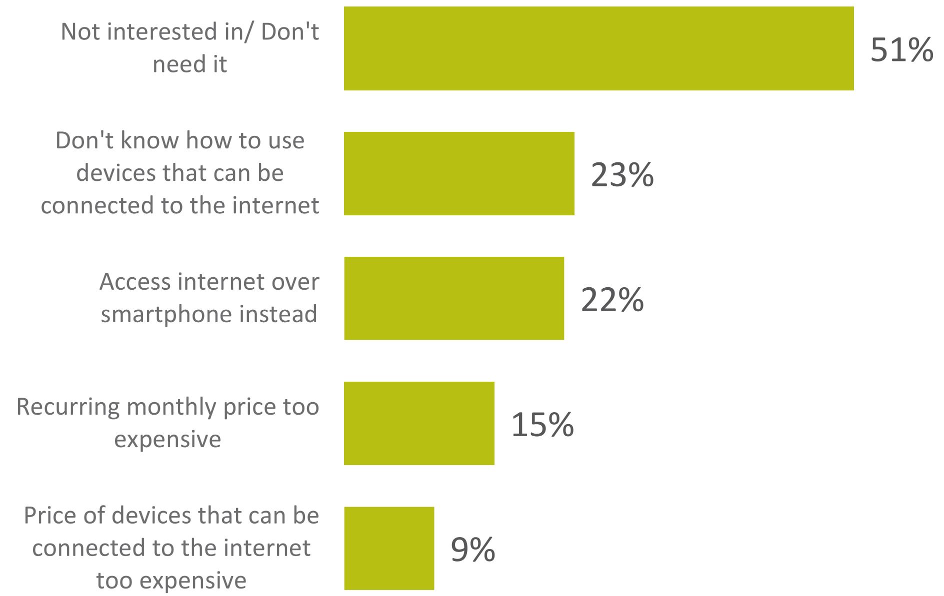
Similarly, the prime reasons for not having Internet access are due to not having a need for it

Main Reasons for Not Having Internet Access



Age				Social Class			Region		
18-34	35-54	55-64	65+	ABC1	C2DE	F	Urban	Semi-Rural	Rural
% (56)	% (60)	% (76)	% (168)	% (73)	% (220)	% (67)	% (83)	% (133)	% (144)
22	39	53	68	47	48	70	42	65	33
3	21	21	34	11	23	38	22	24	24
56	27	19	5	31	23	-	31	10	11
21	26	15	8	15	16	9	18	14	9
12	14	11	5	4	11	3	14	2	5

*Only mentions over 8%

Q.2c Why do you currently not have access to the Internet/Broadband in your home?
Base: 360

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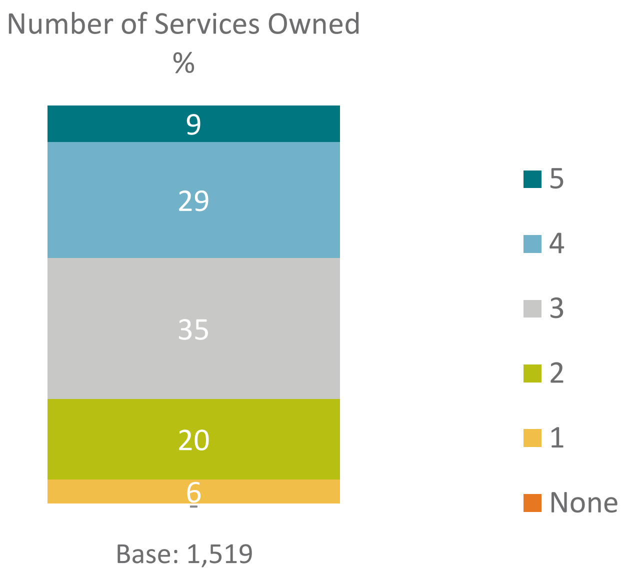
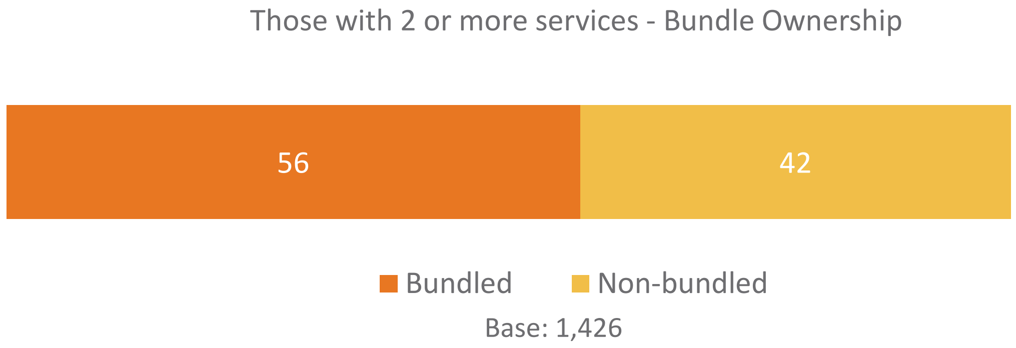
Bundling

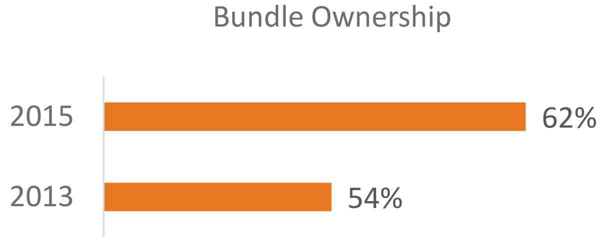
Those living in urban areas typically have a higher number of services than those in rural areas. Over half of those with two or more services purchase multiple services in a bundle.

Number of Services Owned



	Age				Social Class			Region		
	18-34	35-54	55-64	65+	ABC1	C2DE	F	Urban	Semi-Rural	Rural
	% (356)	% (606)	% (235)	% (322)	% (637)	% (722)	% (160)	% (504)	% (511)	% (504)
5	8	11	12	6	15	5	3	12	6	5
4	23	34	30	28	39	22	28	29	30	31
3	37	37	33	30	32	38	33	35	34	36
2	25	16	16	24	12	26	28	19	22	23
1	7	2	9	11	2	9	8	6	7	5
None	*	-	-	-	-	*	-	-	*	-





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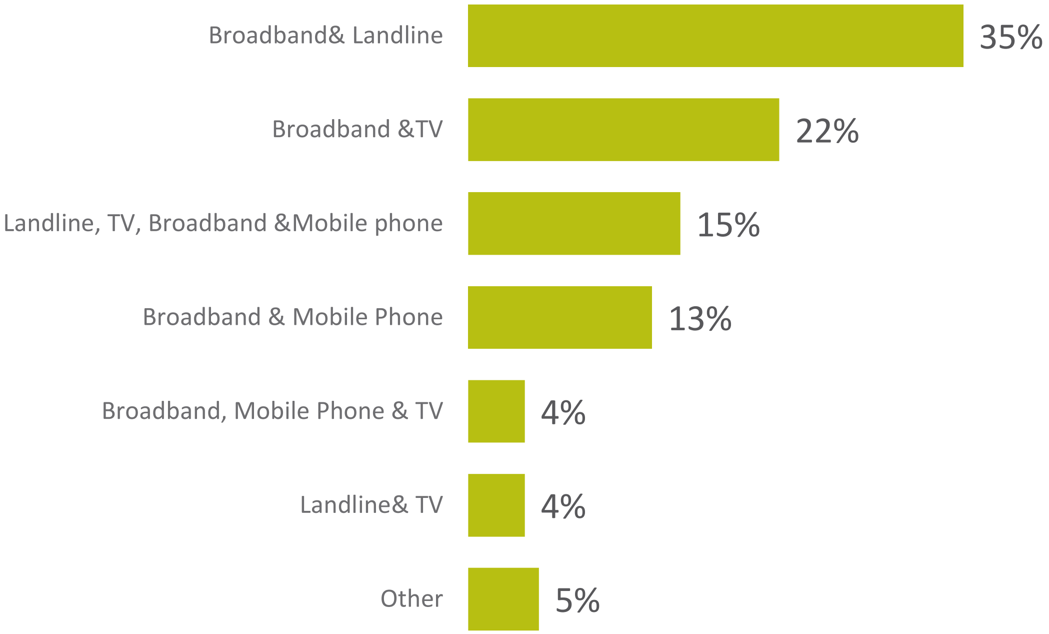
Just over a third of those with bundled services have a broadband and landline bundle, with 22% having a broadband and TV bundle. While the latter is more common in urban areas, the former is more common in rural areas

Bundle Type Ownership



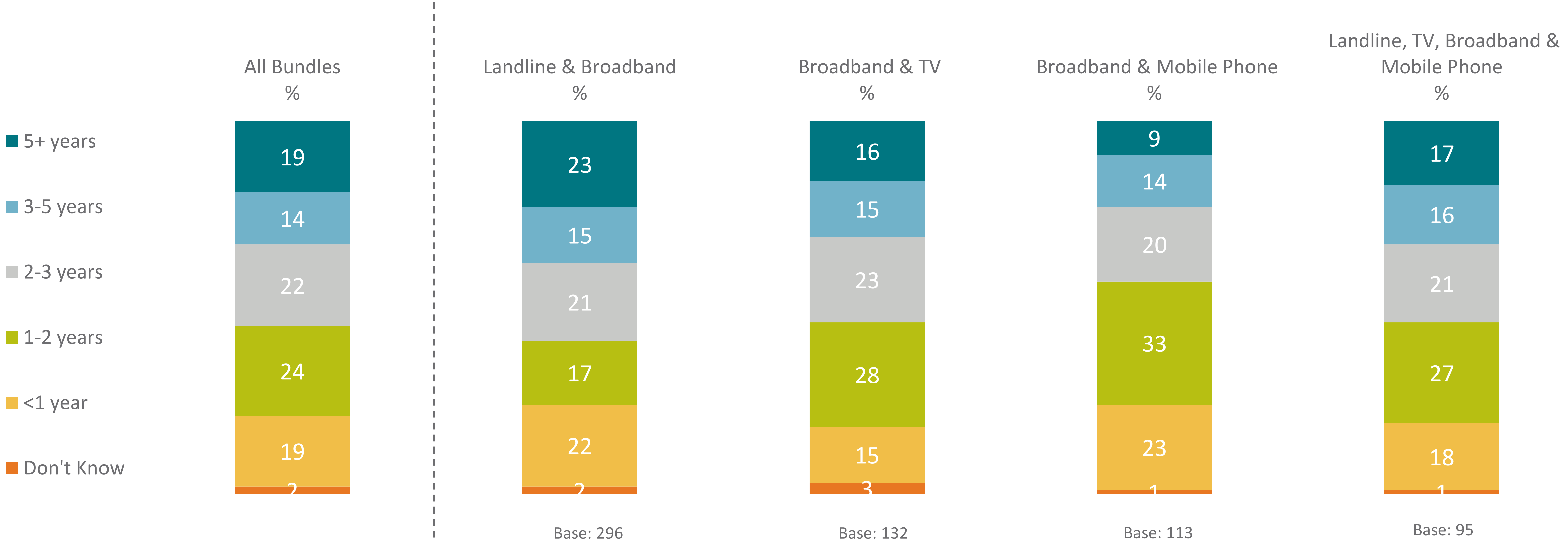
Age				Social Class			Region		
18-34	35-54	55-64	65+	ABC1	C2DE	F	Urban	Semi-Rural	Rural
% (181)	% (344)	% (108)	% (105)	% (382)	% (308)	% (48)*	% (301)	% (237)	% (200)
19	35	56	44	37	31	60	30	47	44
29	24	13	11	20	25	-	27	11	14
15	13	14	20	19	10	16	16	13	7
24	12	6	4	9	18	18	11	18	22
2	6	5	2	6	3	-	5	2	2
2	6	5	2	6	3	-	5	2	2
8	3	1	9	3	8	3	5	3	7

* Caution, base size < 50.

Q.13a Which of these bundle or package option is your main bundle or package for telecommunication services in your home?
Base: 738

An equal proportion (19%) has taken out a bundle in the past year as has had their bundle for 5 years or longer. Those with a broadband and mobile phone bundle are more likely to have taken it out more recently.

Bundles - Length of Subscription

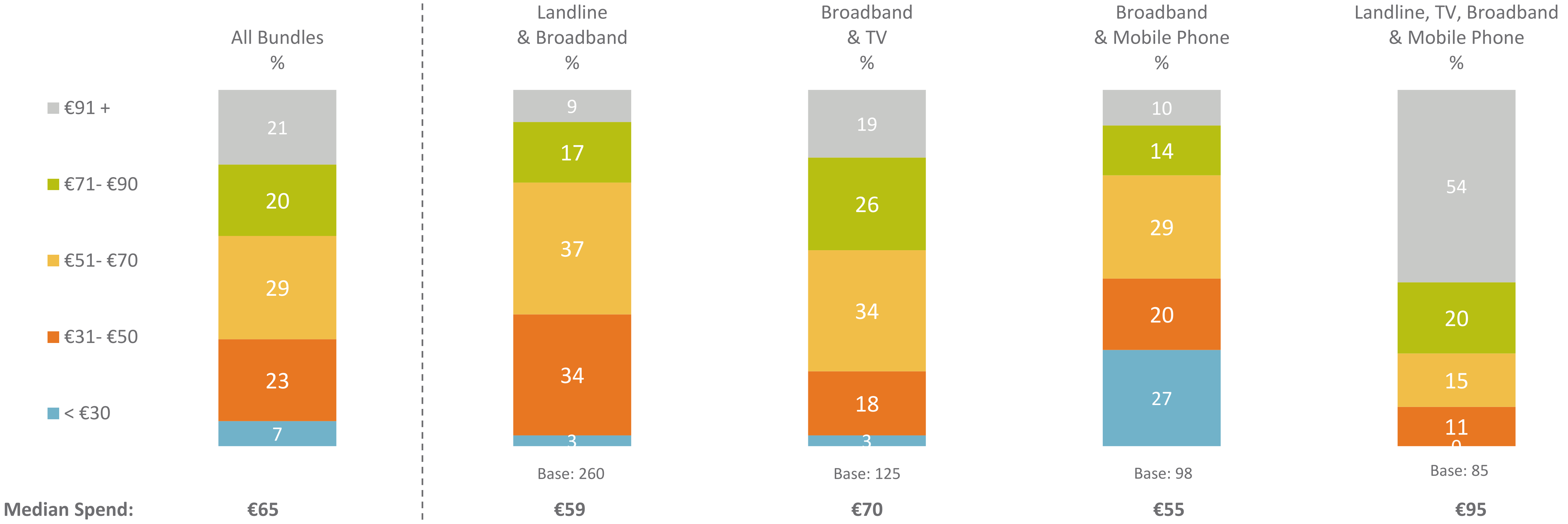


*Other Bundles not shown due to small base sizes (<50).

Q.14c How long ago did you subscribe to this particular bundle?
Base: 738

The median amount spent on bundle services is €65 per month. Those with more services in the bundle naturally spend a higher amount.

Bundle Spend

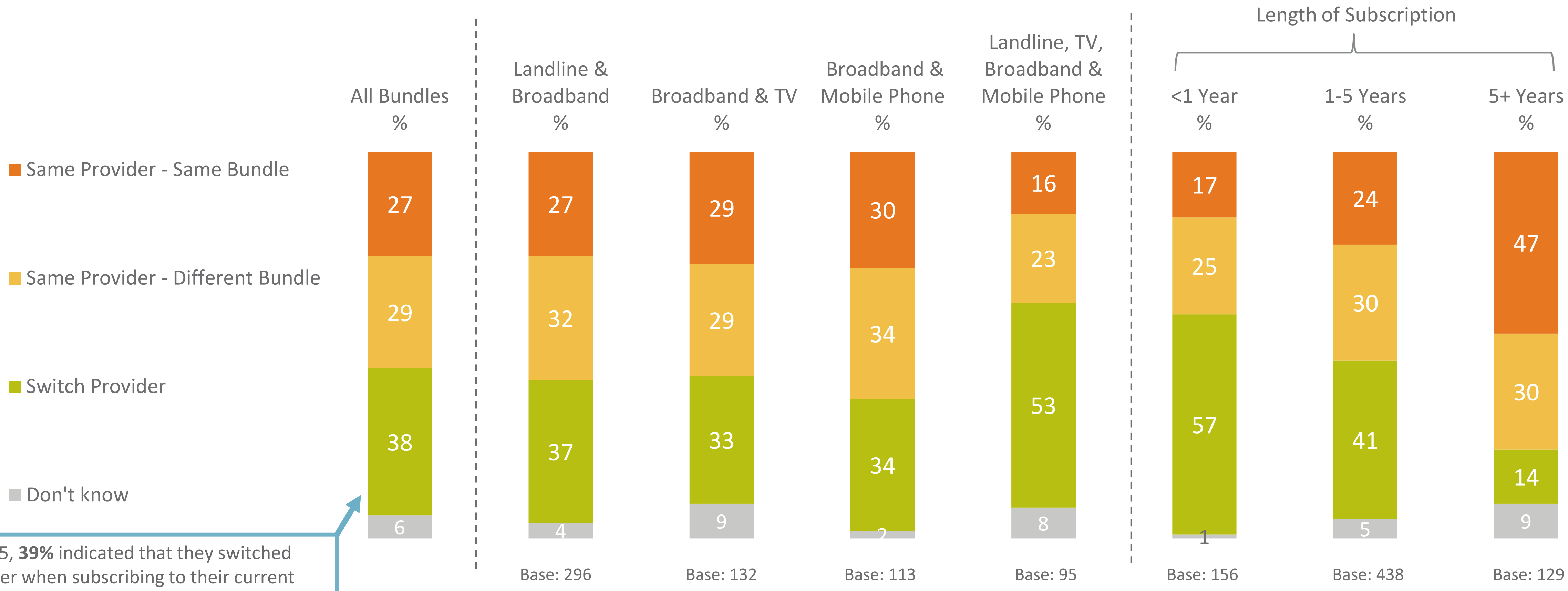


*Other Providers not shown due to small base sizes (<50).

Q.14b How much do you pay per month for these services?
Base: 659

Almost 2 out of every 5 households with a bundle switched providers when subscribing to the bundle. This is more common among those subscribing to a bundle in the past year.

Bundles - Switching Providers



In 2015, **39%** indicated that they switched provider when subscribing to their current bundle.

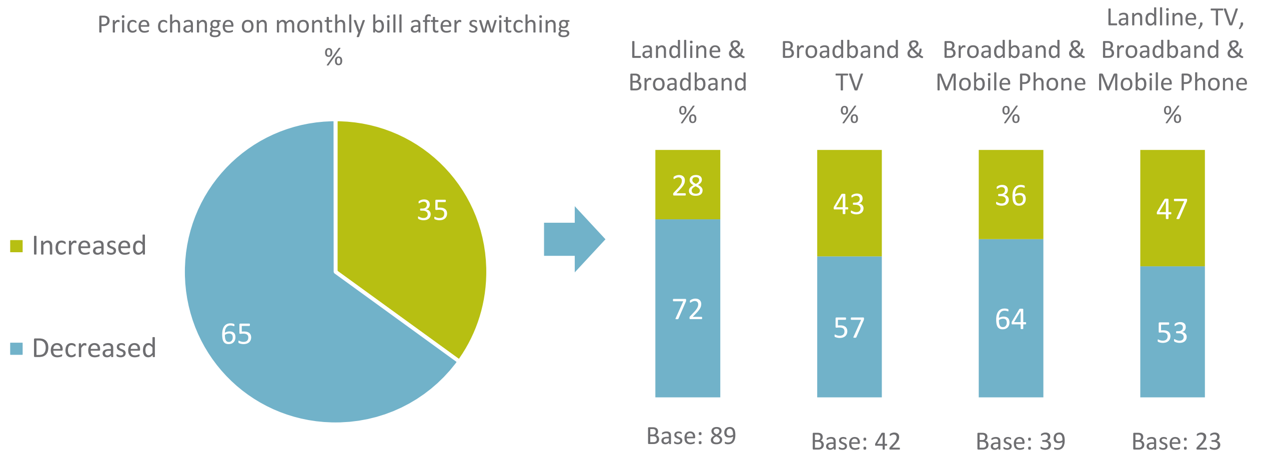
*Other Providers not shown due to small base sizes (<50).

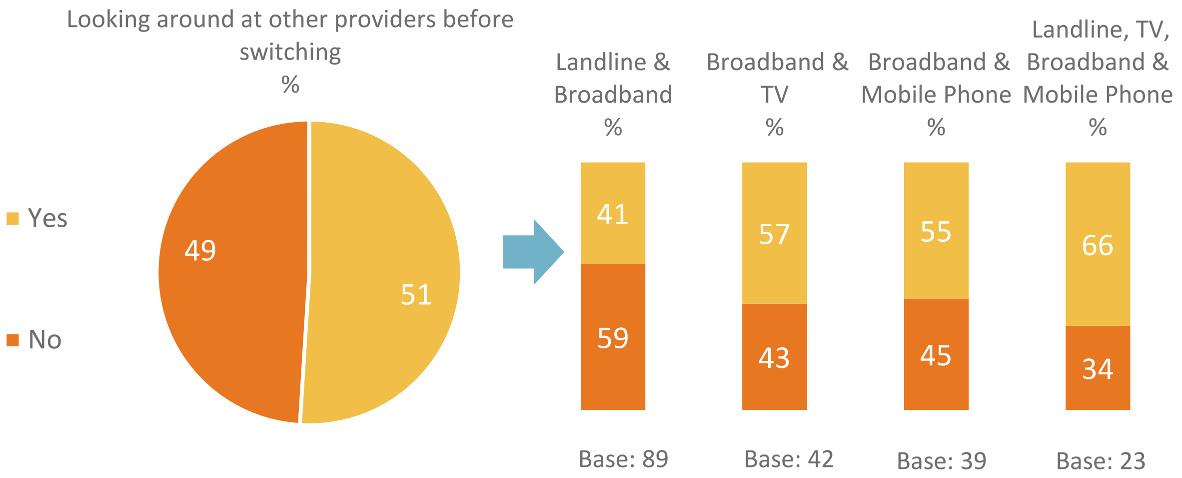
Q.14d When you subscribed to this bundle did you remain with the same service provider or move from one service provider to another to avail of this bundle?

Base: 738

The majority of those with a bundle saw a decrease in their monthly bill when subscribing to the bundle.

Bundles - Switching Bundles with Same Providers

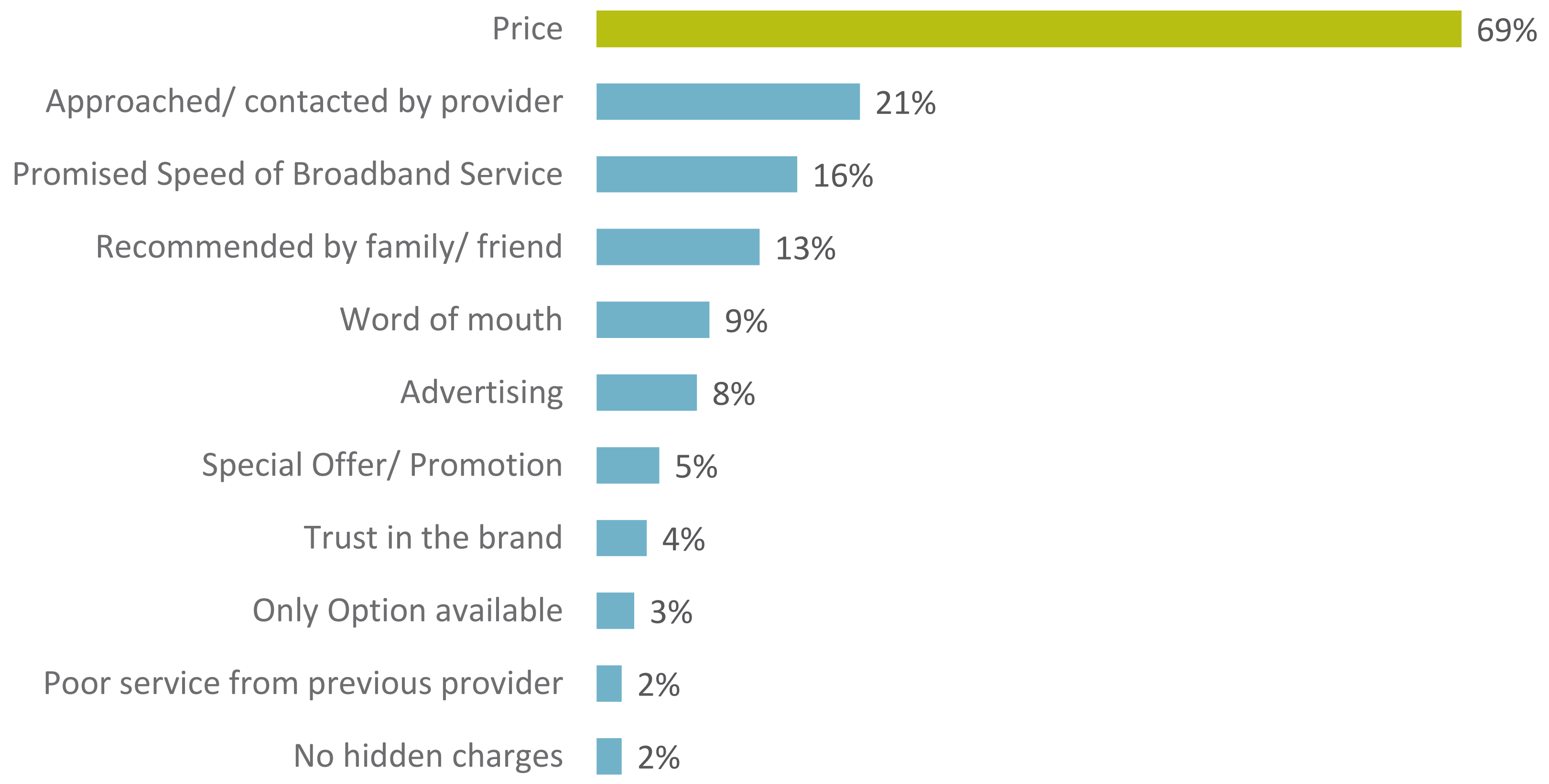




Q.15d Did your monthly bill for services increase or decrease when you switched between your previous package and your current package?
Base: 217
Q.15e Did you or a family member seek to find another package from other providers before you switched to your current bundle/package?
Base: 217

Over two-thirds of those selecting a bundle did so for price reasons

Bundles - Main Reasons for Selecting Providers



*Only mentions over 2%

Q.15 Why did you select this bundle within the past year?
Base: 287

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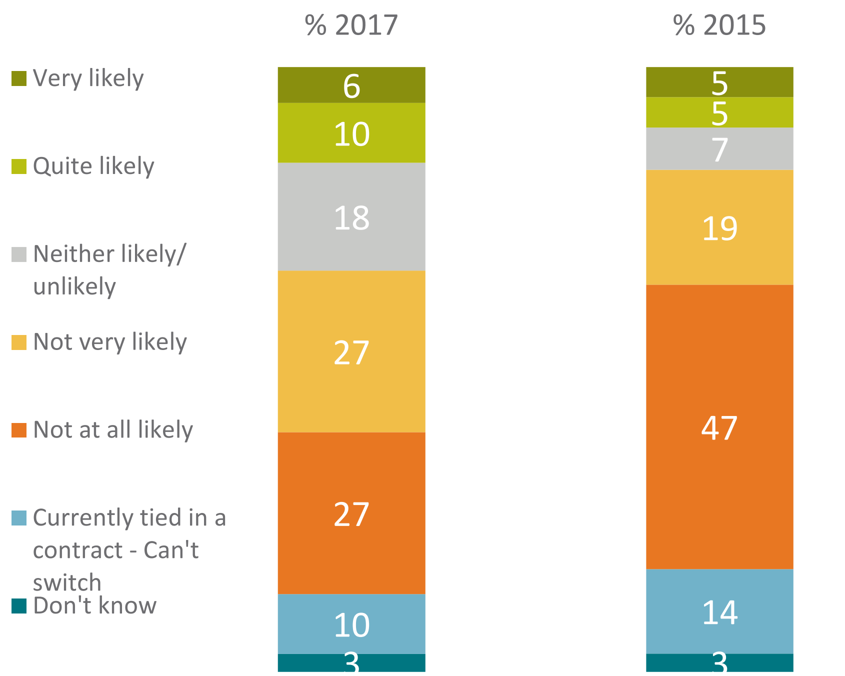
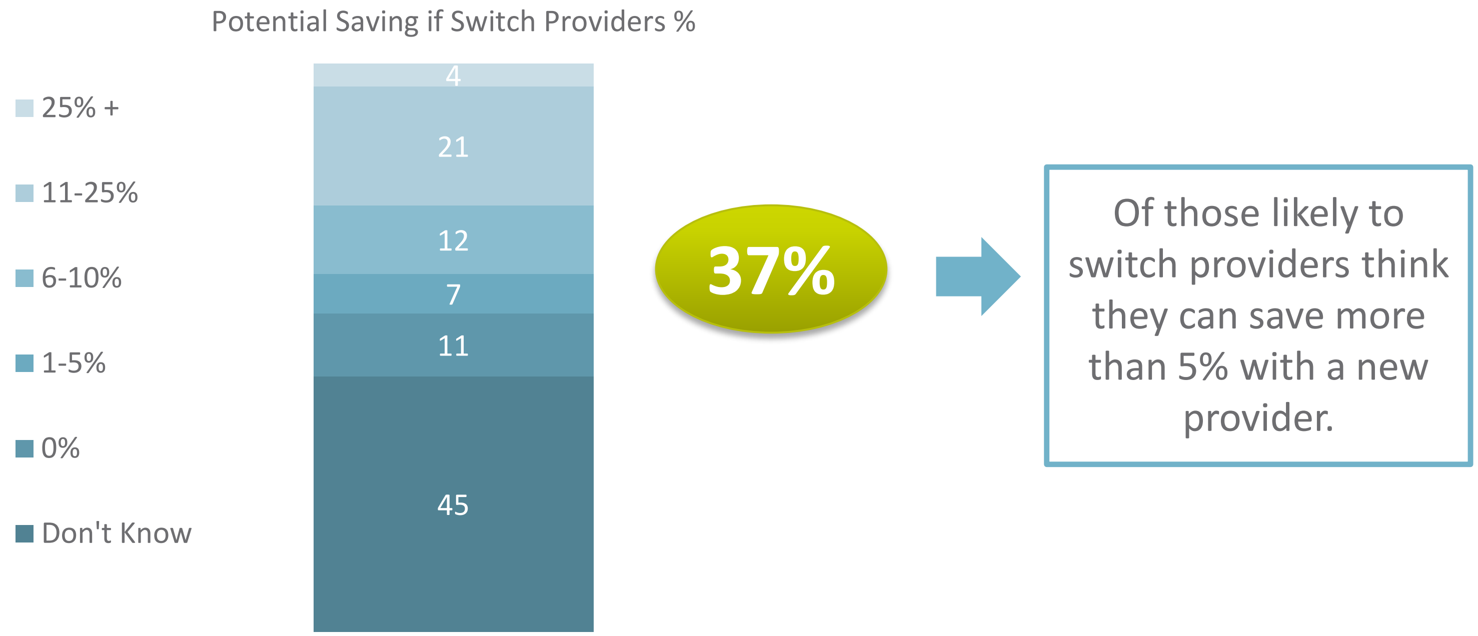
16% say they are likely to switch their bundle provider in the next 12 months. Awareness of potential savings is low, with 45% indicating they don't know how much they could save if they searched for the best deal.

Likelihood to Switch Bundle Providers in the Coming Year





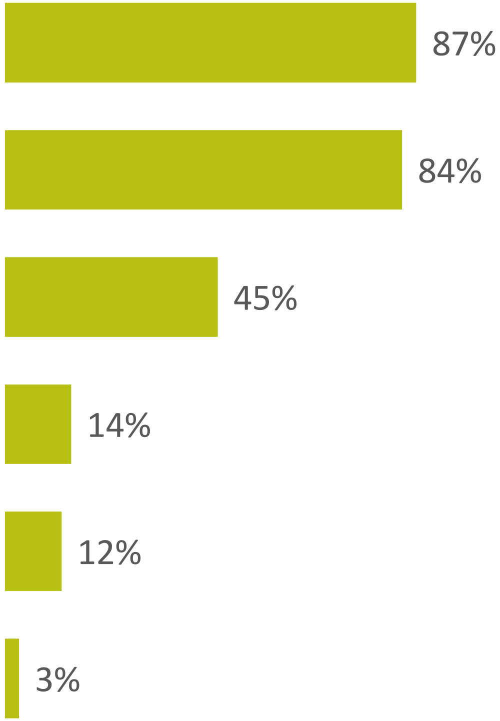
Q.17 How likely are you to consider switching your service provider within the next 12 months?
Base: 738

Q.16 What percentage saving on your current monthly bill for bundle do you think you could receive if you put in the time and effort to search for the best deal?
Base: 738

Landline Usage

While the vast majority of those with a landline use it for making/receiving calls, almost half say that they have the landline service in order to access broadband

Landline Services Usage



				Age				Region		
		2015	2013	18-34	35-54	55-64	65+	Urban	Semi-Rural	Rural
				% (116)	% (280)	% (137)	% (240)	%(260)	%(267)	%(246)
Receive Calls	87%	81%	87%	83	80	90	96	86	87	91
Make Calls	84%	80%	65%	67	81	88	95	83	84	90
Keep it for Broadband Function	45%	35%	19%	52	55	48	26	47	45	35
Alarm Monitoring System	14%	8%	2%	12	14	13	16	15	10	14
Security	12%	6%	3%	15	9	9	16	13	8	12
Have not used it in the past 6 months	3%	N/A	N/A	6	4	3	1	3	5	1

Q 19 In the last 6 months, what do you and other members in your household use your home landline telephone service for?
Base: 773

Half of households indicate that they have their landline service with Eir. Usage of Eir is more common among households that do not bundle their landline service with other services

Main Landline Providers

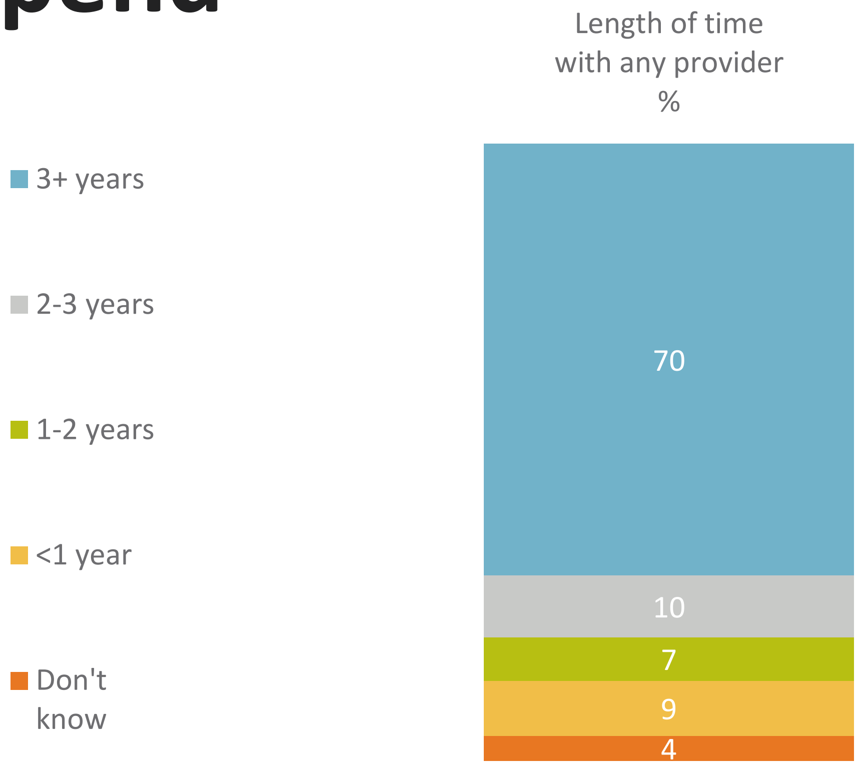
	2017	2015	2013	Bundle	Non-Bundle	Urban	Semi- rural	Rural
	%	%	%	%	%	%	%	%
Eir/ Eircom	51	46	56	45	70	45	61	63
Virgin Media	21	23	18	24	11	33	*	-
Vodafone	12	17	16	13	9	9	16	18
Sky Talk	12	11	0	15	2	11	13	9
Pure Telecom	2	N/A	N/A	1	5	1	4	3

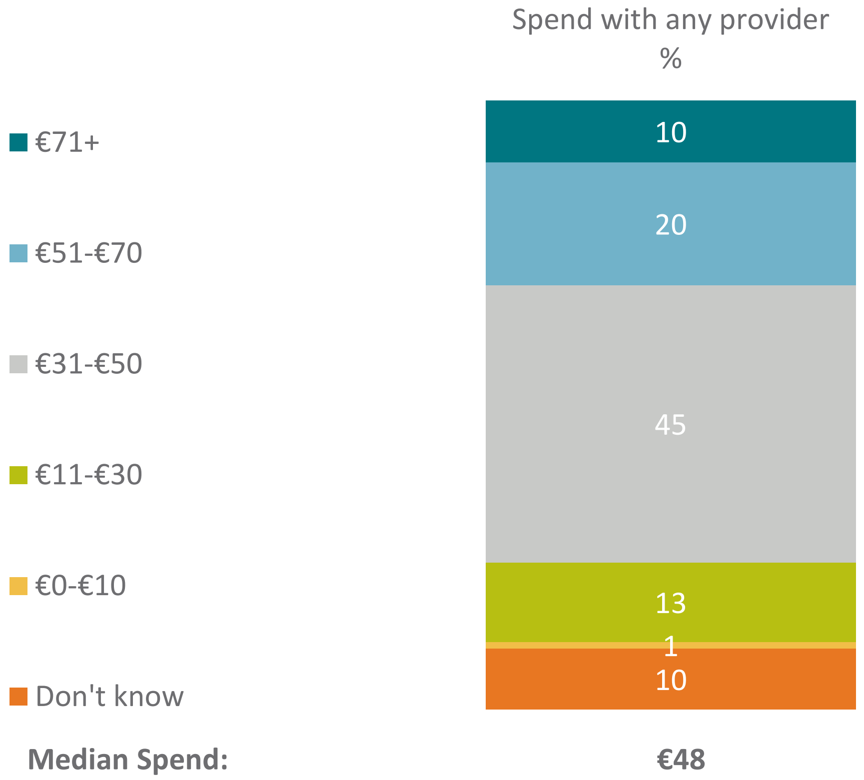
*Other providers mentioned include Imagine, Euphony, Digiweb and IFA (<1% each) .

Q.5 What company do you currently use as your main provider for your landline telephone service ?
Base: 773

70% of consumers have been with their landline provider for more than three years. The median monthly spend on unbundled landline services is €48.

Landline - Length of Time with Provider and Monthly Spend





Q.23 How long have you had your home landline telephone service for?
Base: 343 (non-bundled)
Q.21 How much do you pay per month for this service? Please include overall total including line rental?
Base: 251 (non-bundled)

*Other Providers not shown due to small base sizes (<50).

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While two-thirds in urban areas have been with their landline provider for more than three years, it rises to 80% of those living in rural areas.

Landline - Length of Time with Provider

		Age				Region		
	Total	18-34	35-54	55-64	65+	Urban	Semi-Rural	Rural
	%	% (46)*	% (82)	% (56)	% (159)	% (99)	% (113)	% (131)
3+ years	70	43	60	78	84	67	73	80

* Caution, base size < 50.

Q.23 How long have you had your home landline telephone service for?
Base: 343 (non-bundled)

The median spend on landline services is similar across all ages and regions.

Landline - Monthly Spend

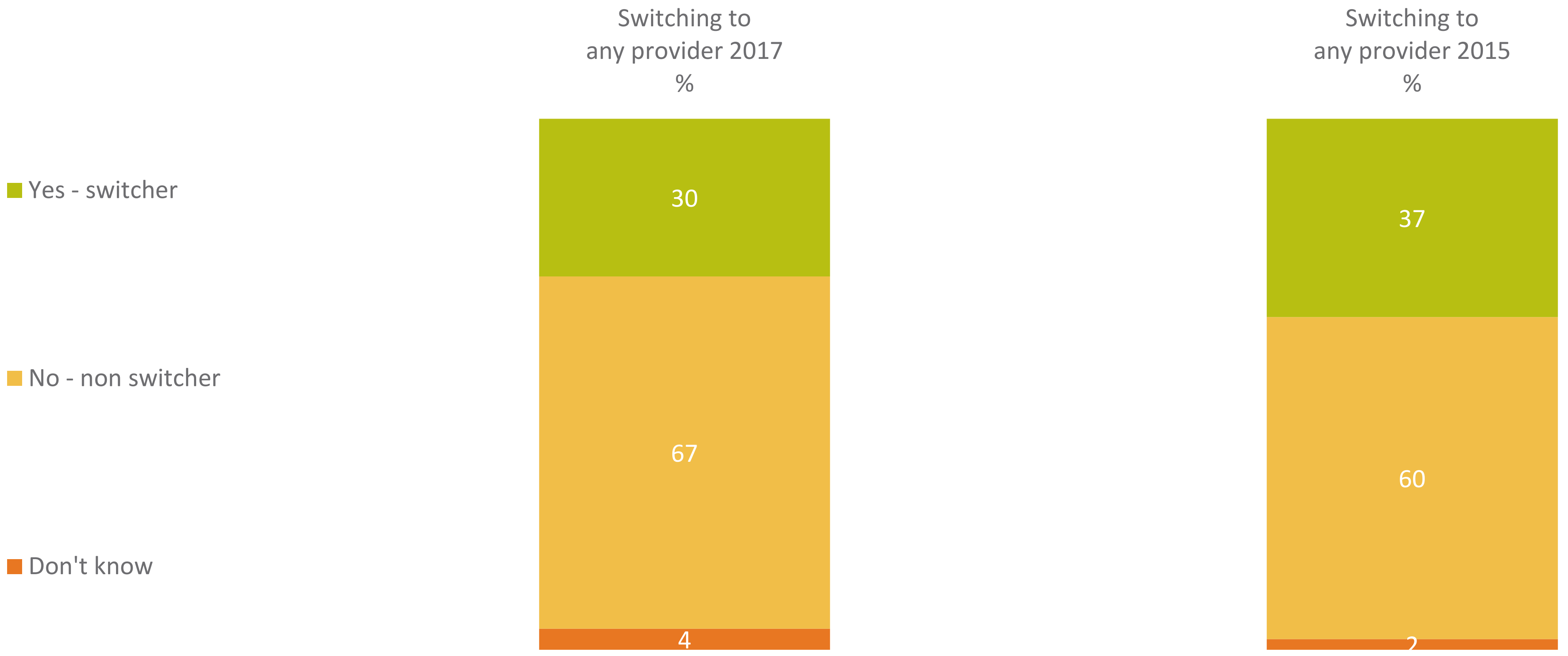
	Total	Age: 18-34	Age: 35-54	Age: 55-64	Age: 65+	Region: Urban	Region: Semi-Rural	Region: Rural
		(28)*	(56)	(44)*	(123)	(69)	(85)	(97)
Median Spend	€48	€45	€50	€50	€45	€50	€40	€45

* Caution, base size < 50.

Q.21 How much do you pay per month for this service? Please include overall total including line rental?
Base: 251 (non-bundled)

Almost a third of landline users have switched provider at some stage. This is slightly lower than in the previous survey.

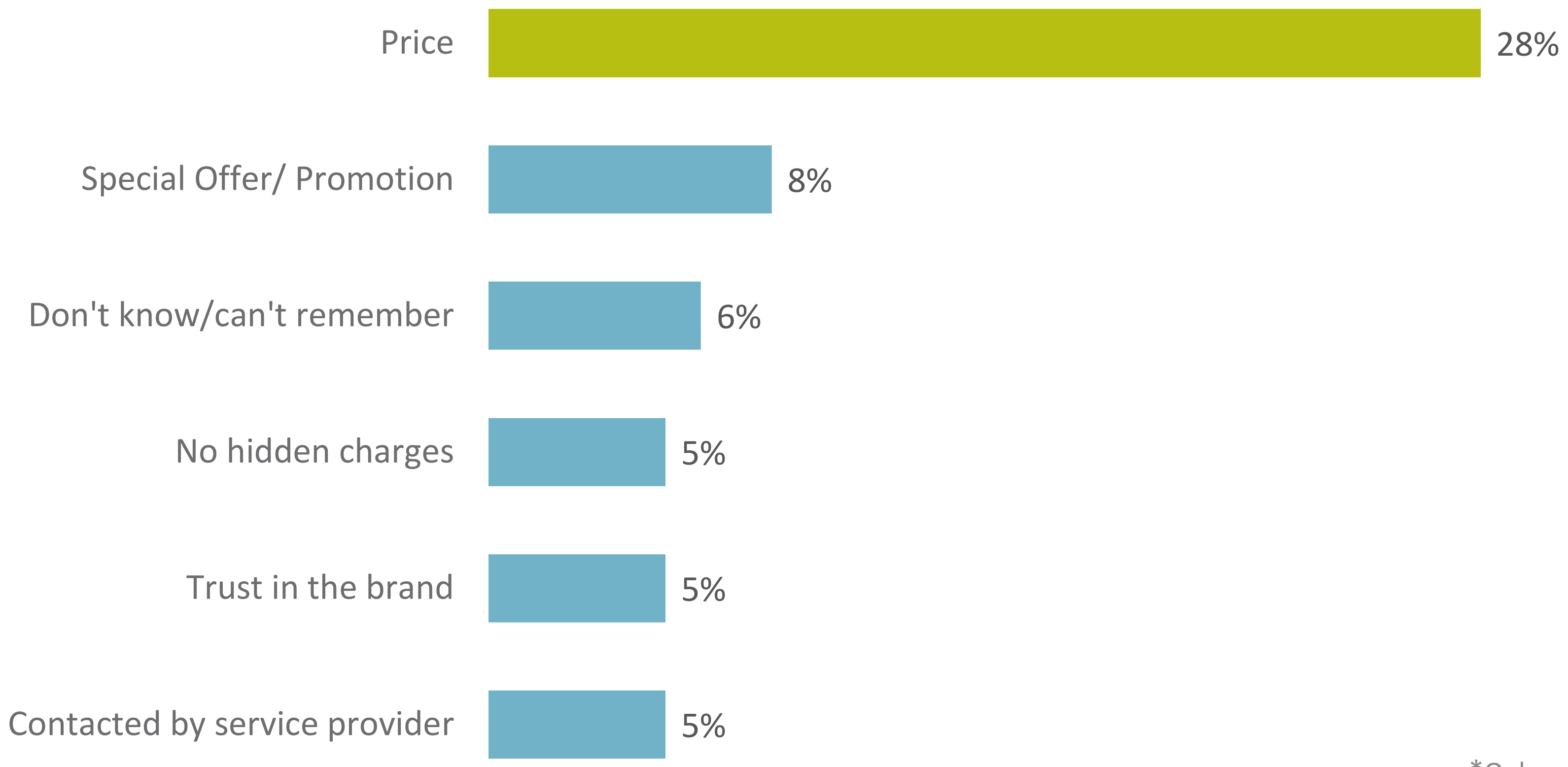
Landline - Incidence of Switching



*Other Providers not shown due to small base sizes (<50).

Q.24a Have you previously purchased this service from other service provider(s)?
Base: 343 (non-bundled)

Landline - Reasons for Selecting Provider



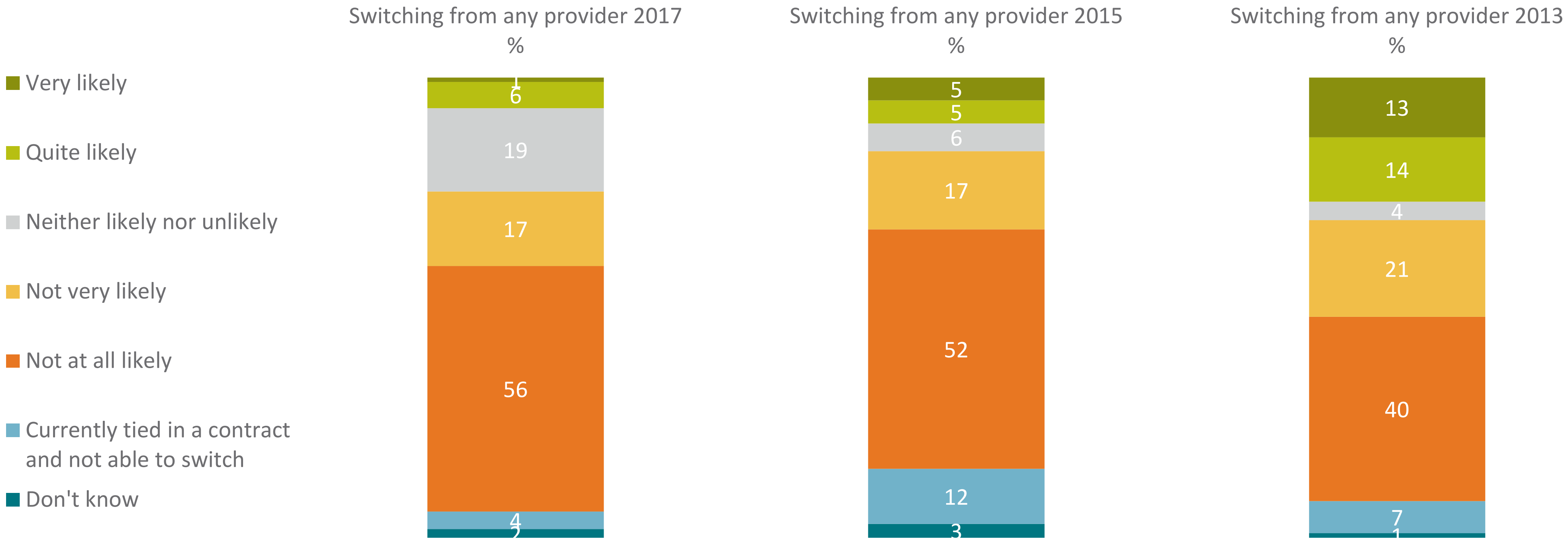
*Only mentions over 2%

** Caution, base size < 50.

Q.24b What prompted you to select this provider within the past year?
Base: 32 (non-bundled)

Roughly three-quarters of landline users say they are unlikely to switch landline provider in the next 12 months

Landline - Likelihood to Switch Provider in the Next 12 Months



*Other Providers not shown due to small base sizes (<50).

Q.29a How likely are you to consider switching landline telephone service supplier within the next 12 months?
Base: 343 (non-bundled)

Mobile Usage

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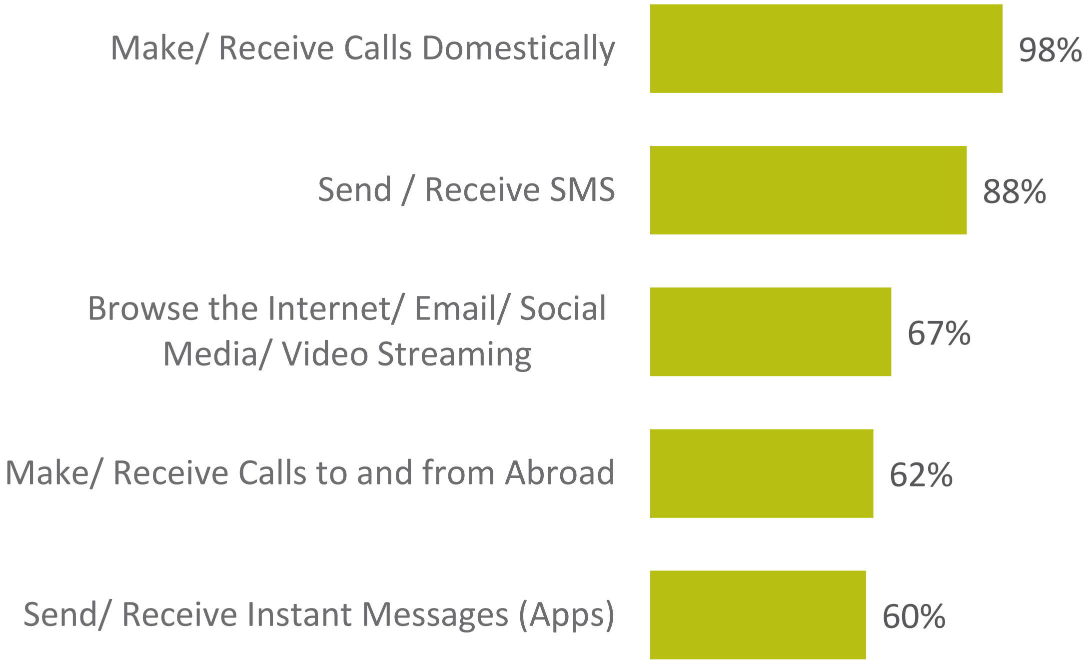
60% of mobile phone users use their phone to send and receive instant messages via apps. Strong differences exist across age groups in terms of using the phone for online services.

Mobile Phone Services Usage



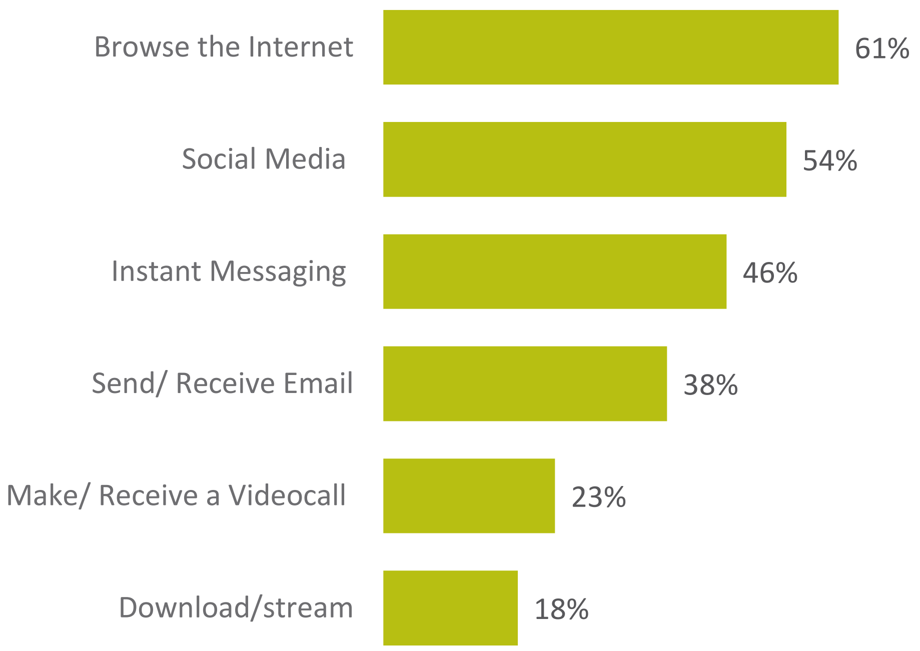
Age				Region		
18-34	35-54	55-64	65+	Urban	Semi-Rural	Rural
% (355)	% (601)	% (231)	% (281)	% (494)	% (490)	% (484)
98	98	99	99	97	100	100
96	94	85	64	90	85	84
86	79	51	20	68	63	65
68	65	56	54	66	55	56
81	68	44	21	62	56	54

Q.30 Do you personally use your mobile telephone for any of the following?
Base: 1,468

Almost three-quarters of 18 to 34 year olds browse social media over a mobile network on a daily basis

Mobile Phone 3G/4G Data - Frequency of Use

% who use service at least once a day

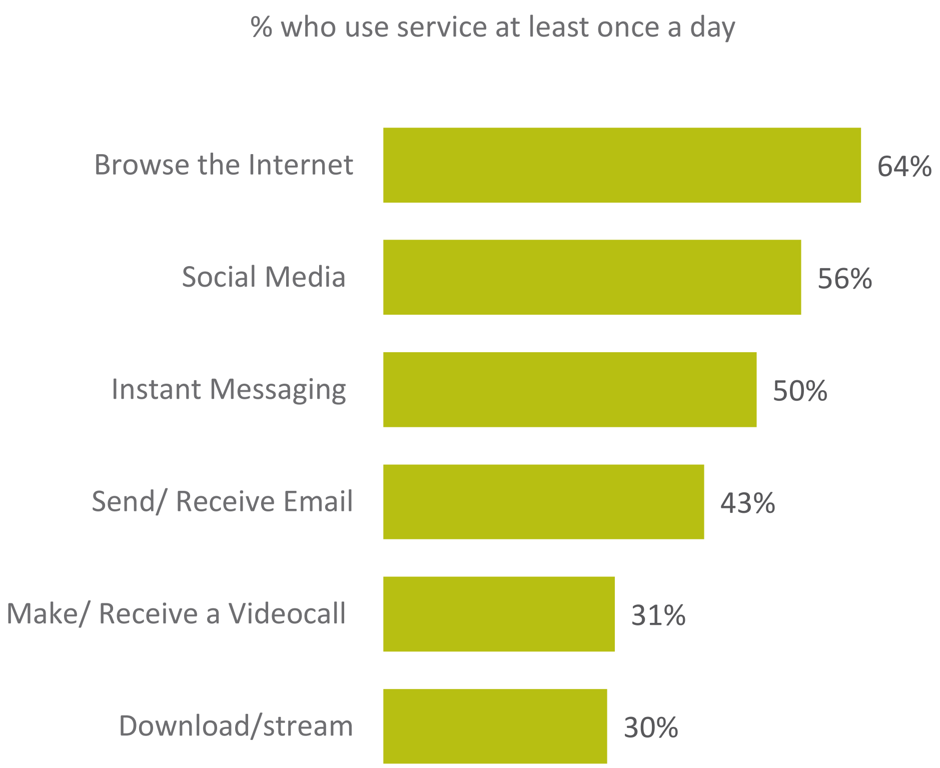


Age				Region		
18-34	35-54	55-64	65+	Urban	Semi-Rural	Rural
% (331)	% (512)	% (117)	% (69)	% (372)	% (338)	% (319)
76	60	41	30	60	59	70
73	53	26	27	55	50	55
63	45	24	16	47	45	47
45	37	28	24	38	37	40
30	24	8	14	25	18	21
30	16	5	3	19	17	14

Q.87a How often do you use your mobile phone's 3G/4G data service <u>**(as distinct from WiFi)**</u> for each of the following services?
Base: 1,029

Younger people more likely to use each type of mobile service (via WiFi) on a daily basis

WiFi Network - Frequency of Use



Age				Region		
18-34	35-54	55-64	65+	Urban	Semi-Rural	Rural
% (331)	% (512)	% (117)	% (69)	% (372)	% (338)	% (319)
76	66	45	34	66	61	59
71	57	36	18	59	53	46
61	52	31	26	53	47	42
49	43	34	29	44	42	38
40	31	21	8	34	27	23
41	30	19	7	33	26	22

Q.87c How often do you use your mobile phone connected to a WiFi network (home, work, café, shop etc.) **(as distinct from 3G/4G data)** for each of the following services?

Base: 1,029

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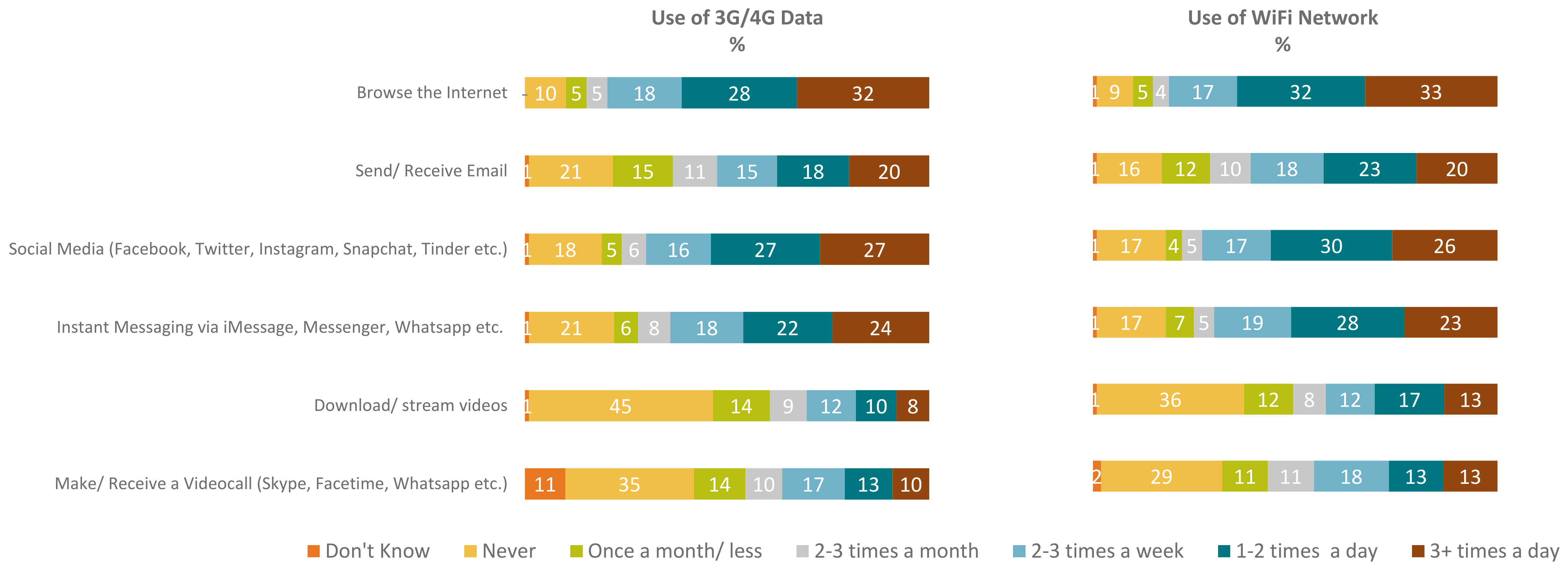
Very little difference exists between Smartphone usage on WiFi and on 3G/4G services. The exception to this is downloading/streaming videos, which is more commonly used on WiFi networks.

Mobile Phone Online Services - Frequency of Use



Q.87a How often do you use your mobile phone's 3G/4G data service **(as distinct from WiFi)** for each of the following services?
Base: 1,029
Q.87c How often do you use your mobile phone connected to a WiFi network (home, work, café, shop etc.) **(as distinct from 3G/4G data)** for each of the following services?
Base: 1,029

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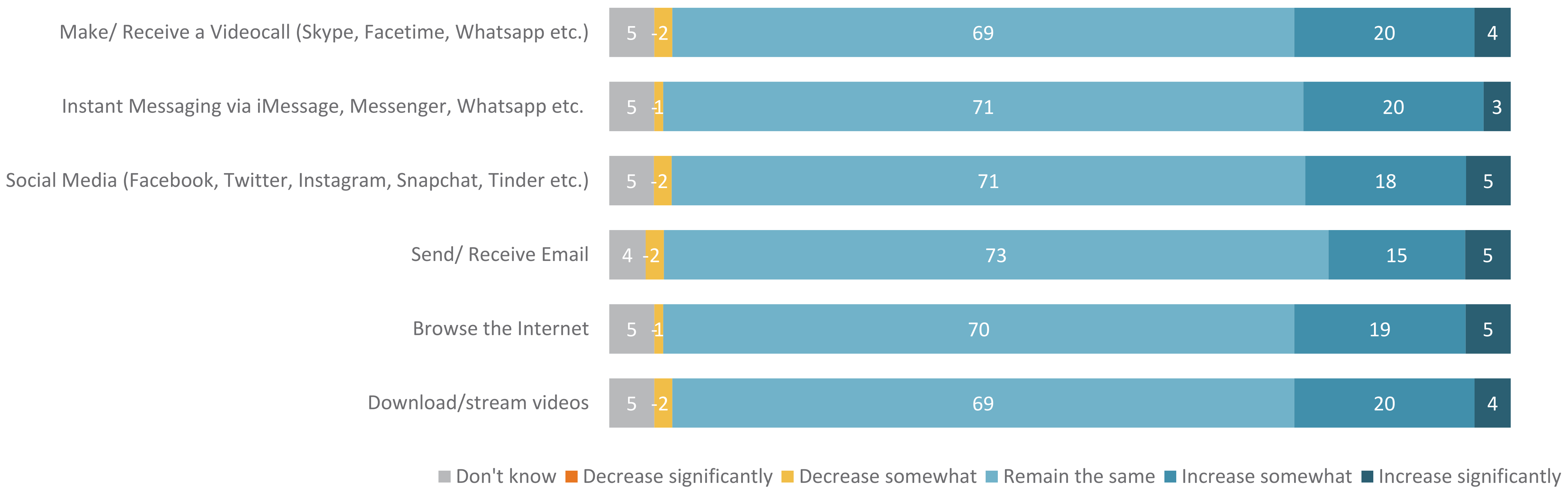
Across each type of service, roughly a quarter expect their usage over 3G/4G to increase over the next 12 months

Mobile Phone 3G/4G Data - Change of Use



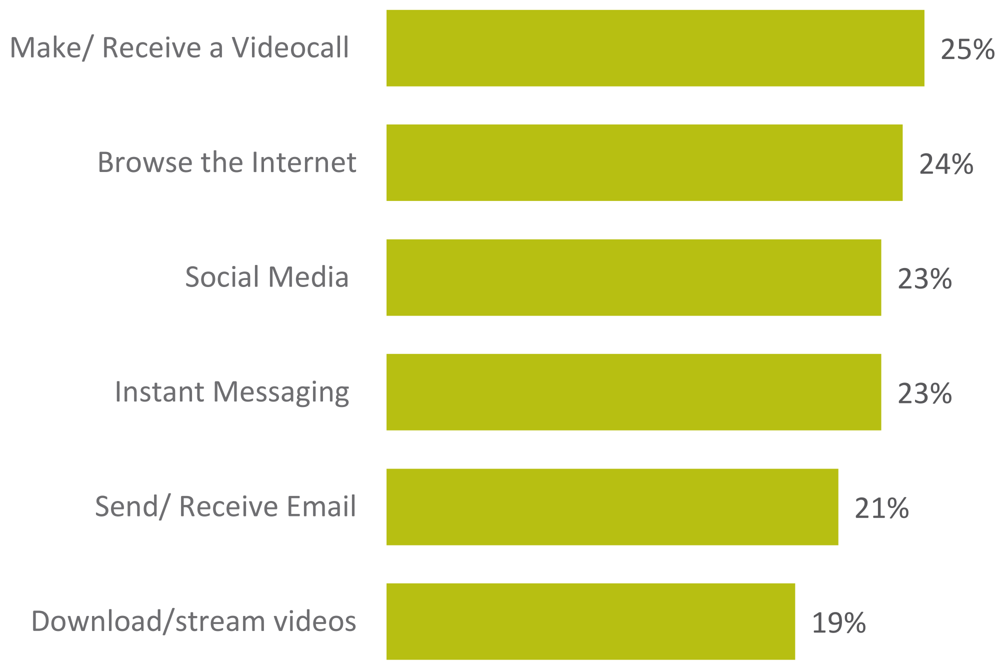
Q.87b Do you expect you use of mobile 3G/4G data services **(as distinct from WiFi)** on your mobile phone will change over the next 12 months for the following services

Base: 886

Those aged 18 to 34 more likely to expect their usage to increase in the coming 12 months, with almost 1 in 3 expecting usage of videocall services over mobile networks to increase

Mobile Phone 3G/4G Data - Anticipated Change in Use

% who expect service to increase



Age				Region		
18-34	35-54	55-64	65+	Urban	Semi-Rural	Rural
% (243)	% (344)	% (62)	% (34)*	% (240)	% (205)	% (238)
32	21	15	18	27	16	29
32	21	15	18	27	16	29
27	19	18	31	24	18	26
31	19	16	23	24	18	30
23	17	28	16	22	16	20
24	15	14	31	19	17	25

Q.87b Do you expect you use of mobile 3G/4G data services **(as distinct from WiFi)** on your mobile phone will change over the next 12 months for the following services

Base: 886

* Caution, base size < 50.

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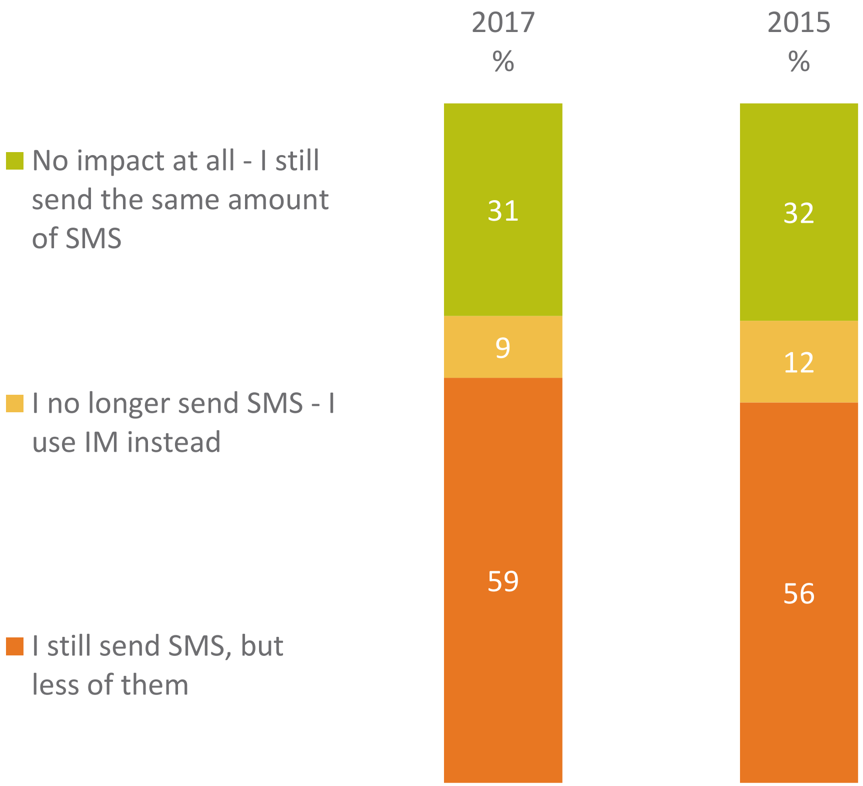
The vast majority of those using instant messaging/social media say that they still sent SMS messages, although most say that they send fewer messages in this way than they used to

Impact of Social Media/ Instant Messaging on SMS



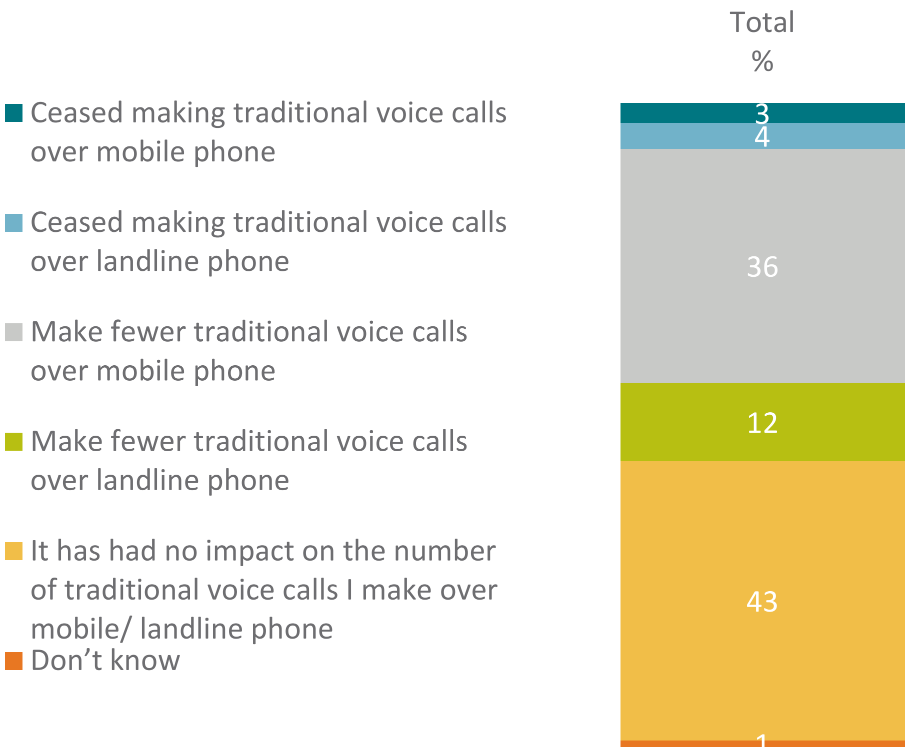
Age				Social Class		
18-34	35-54	55-64	65+	ABC1	C2DE	F
% (282)	% (408)	% (86)	% (45)*	% (415)	% (369)	% (37)*
25	32	47	38	31	31	45
15	7	5	4	10	10	10
61	61	48	58	59	60	45

* Caution, base size < 50.

Q.32a How has your usage of instant messaging/social media impacted your usage of traditional text messages?
Base: 821

43% of those using voice calling through a smartphone app saying that it has had no impact on the number of traditional voice calls that they make.

Impact of Video/ Voice Calls on Traditional Phone Calls



Age				Social class		
18-34	35-54	55-64	65+	ABC1	C2DE	F
% (249)	% (340)	% (57)	% (31)*	% (358)	% (292)	% (27)*
3	4	1	-	3	3	2
3	6	4	-	6	3	-
41	36	30	18	35	38	33
10	12	18	15	12	12	19
41	42	48	62	44	43	46
2	*	-	5	1	1	-

Q.32b How has your usage of video or voice calling via an App on your phone (e.g. Skype, Facetime, Viber, Whatspp etc.) impacted your usage of traditional phone calls?

Base: 677

* Caution, base size < 50.

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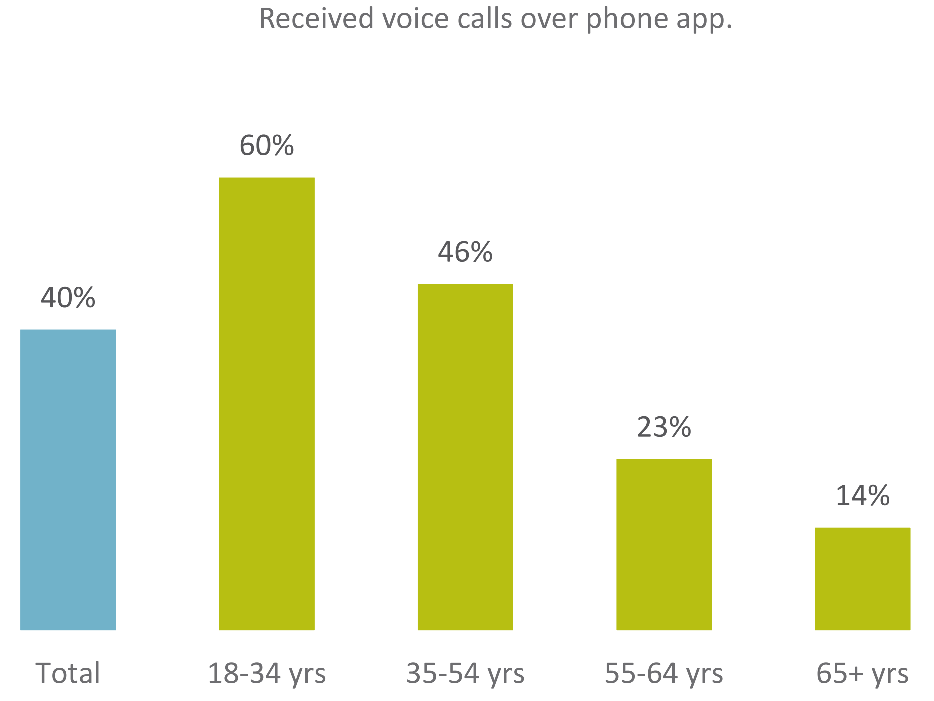
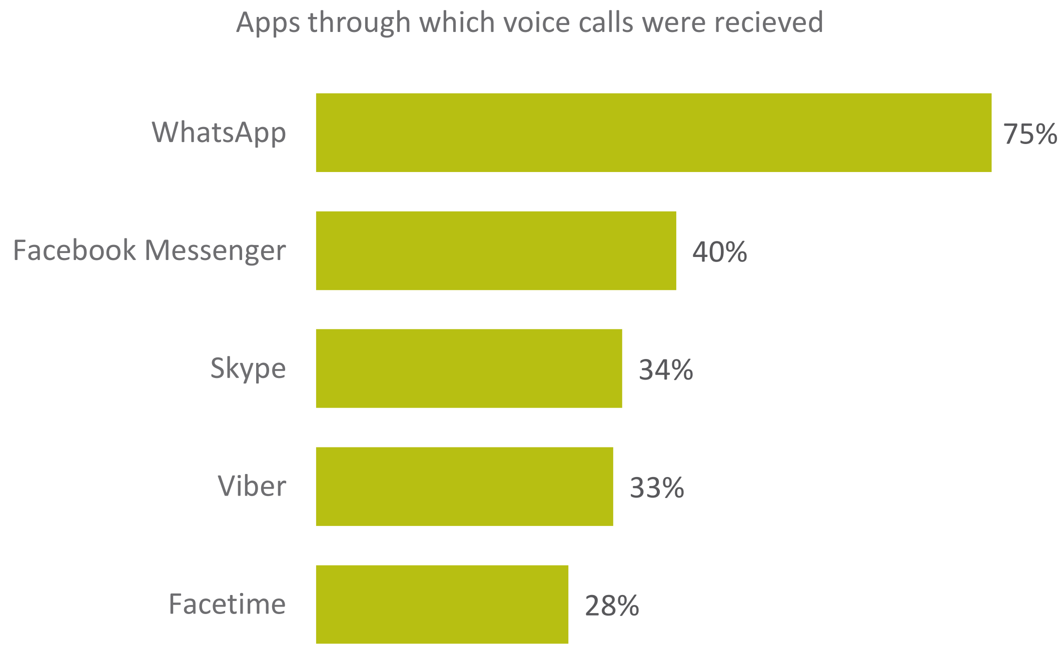
40% of mobile phone users have received a voice call through a mobile phone app in the past 12 months. This increases to 60% of those aged between 18 and 34.

Voice Calls over Phone Applications



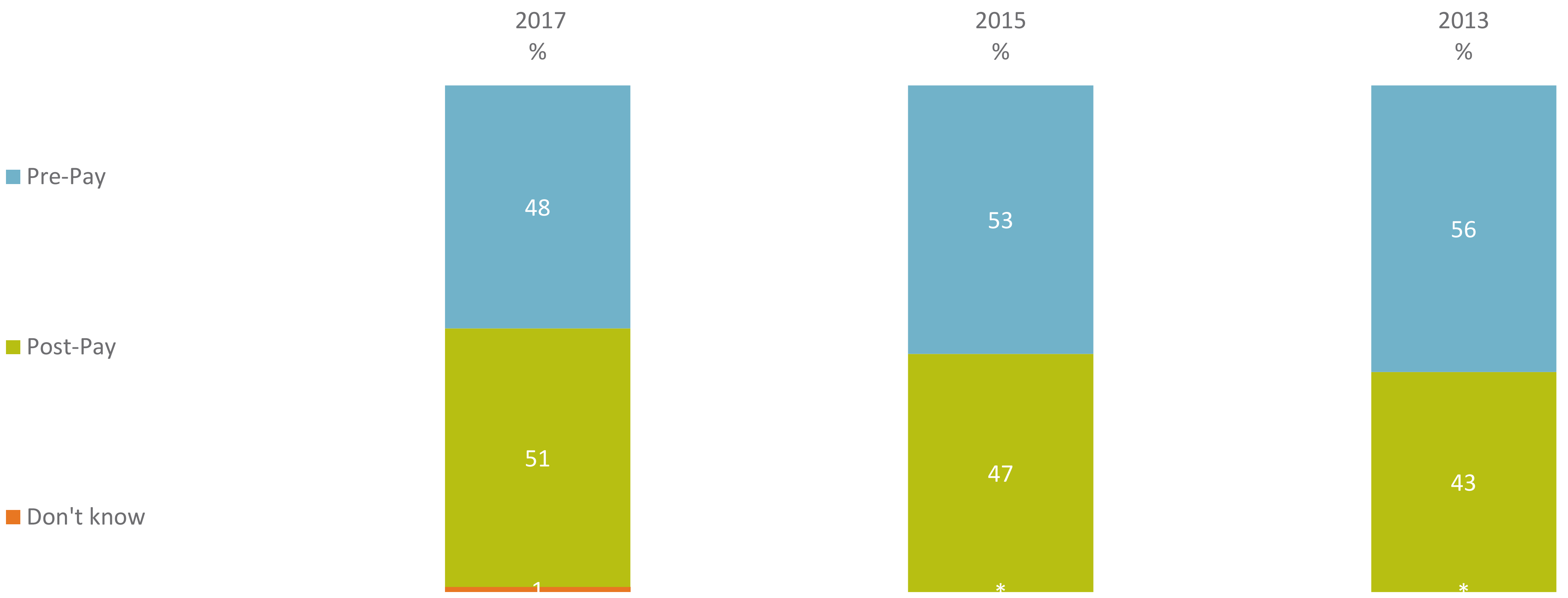


*Only mentions over 2%

Q.88a In the last 12 months have you received an audio call (a phone call or a voice call) made through an Application installed on your phone (e.g. Skype, Viber, Whatsapp) **(excluding video calls – voice only)**
Base: 1,468
Q.88b What application(s) did you receive these audio calls through?
Base: 578

There is a roughly even split between Pre-Pay and Post-Pay services

Mobile Phone - Type of Subscription



Q.33 Thinking about the last time you subscribed to your mobile phone service (i.e. signed up with a mobile phone network) which of the following best describes what you did?

Base: 1,468

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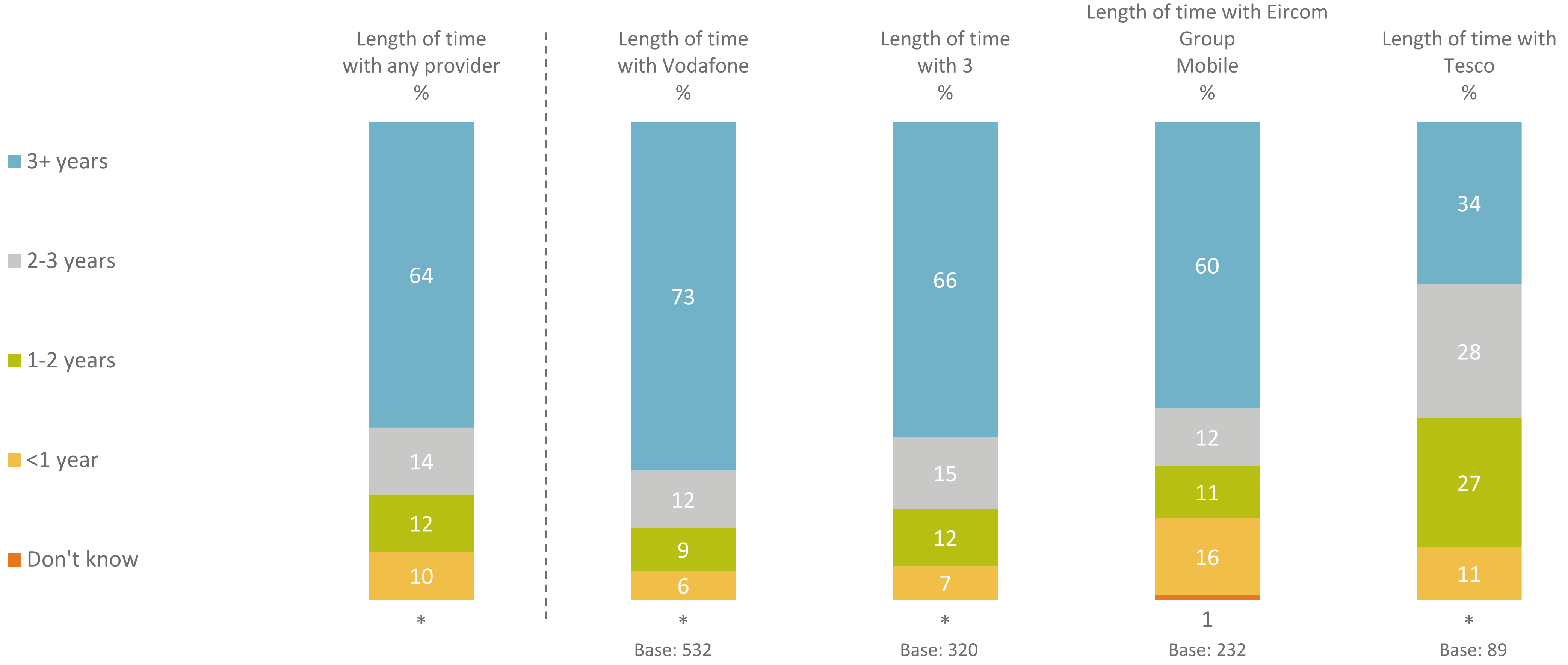
Almost two-thirds have been with the same mobile phone provider for more than 3 years.

Mobile Phone - Length of Time with Provider



Q.39a How long have you had your main mobile phone service for?
Base: 1,213 (non-bundled)

*Other Providers not shown due to small base sizes (<50).

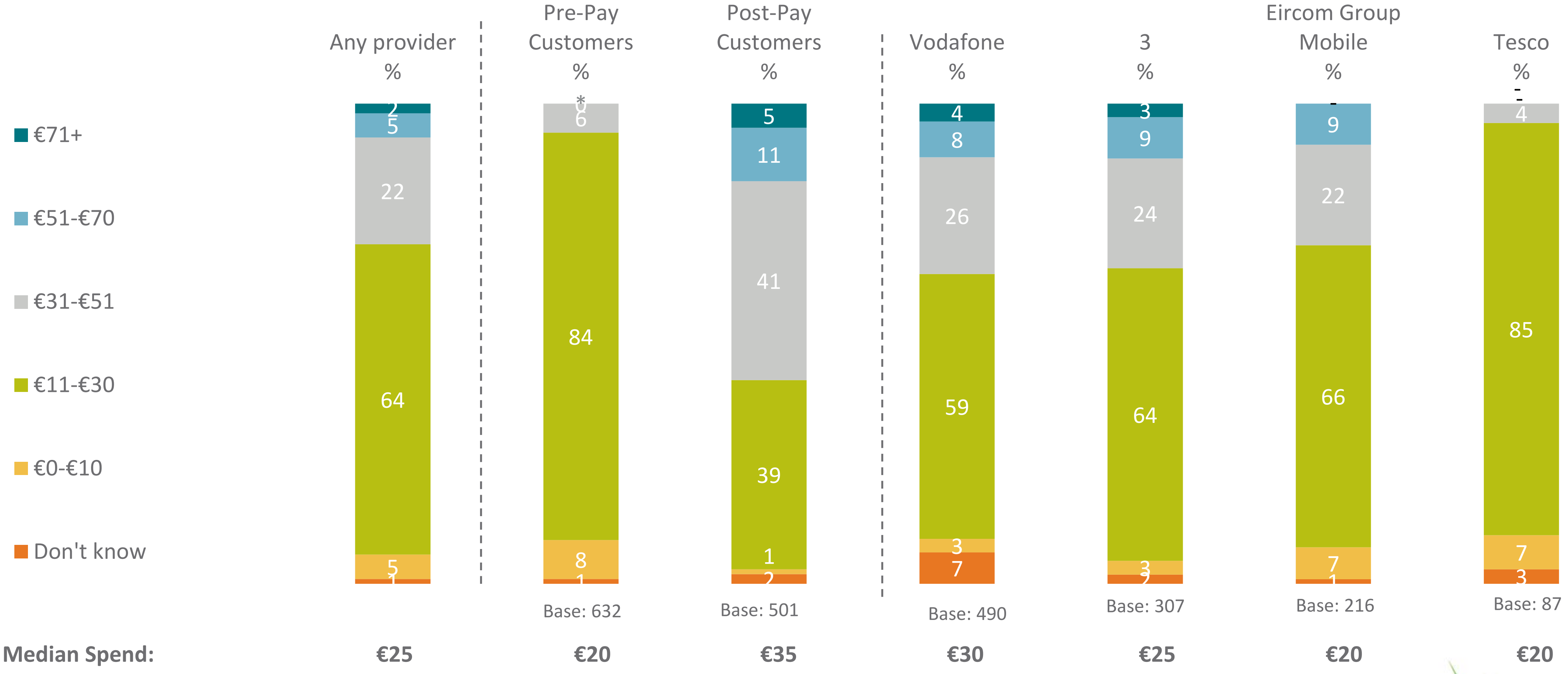
Mobile Phone - Length of Time with Provider

		Age				Region		
	Total	18-34	35-54	55-64	65+	Urban	Semi-Rural	Rural
	%	% (273)	% (484)	% (202)	% (254)	% (390)	% (409)	% (414)
3+ years	64	50	66	66	71	60	69	70

Q.39a How long have you had your main mobile phone service for?
Base: 1,213 (non-bundled)

The median monthly spend on mobile phone services is €25, with broadly similar median spends for each provider.

Mobile Phone - Monthly Spend



Q.36b How much do you pay per month for this service on average?
Base: 1,137 (non-bundled)

*Other Providers not shown due to small base sizes (<50).

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Mobile Phone - Monthly Spend

		Age				Region		
	Total	18-34	35-54	55-64	65+	Urban	Semi-Rural	Rural
		(261)	(451)	(192)	(233)	(355)	(345)	(387)
Median Spend	€25	€30	€30	€20	€20	€25	€25	€25

Q.36b How much do you pay per month for this service on average?
Base: 1,137 (non-bundled)

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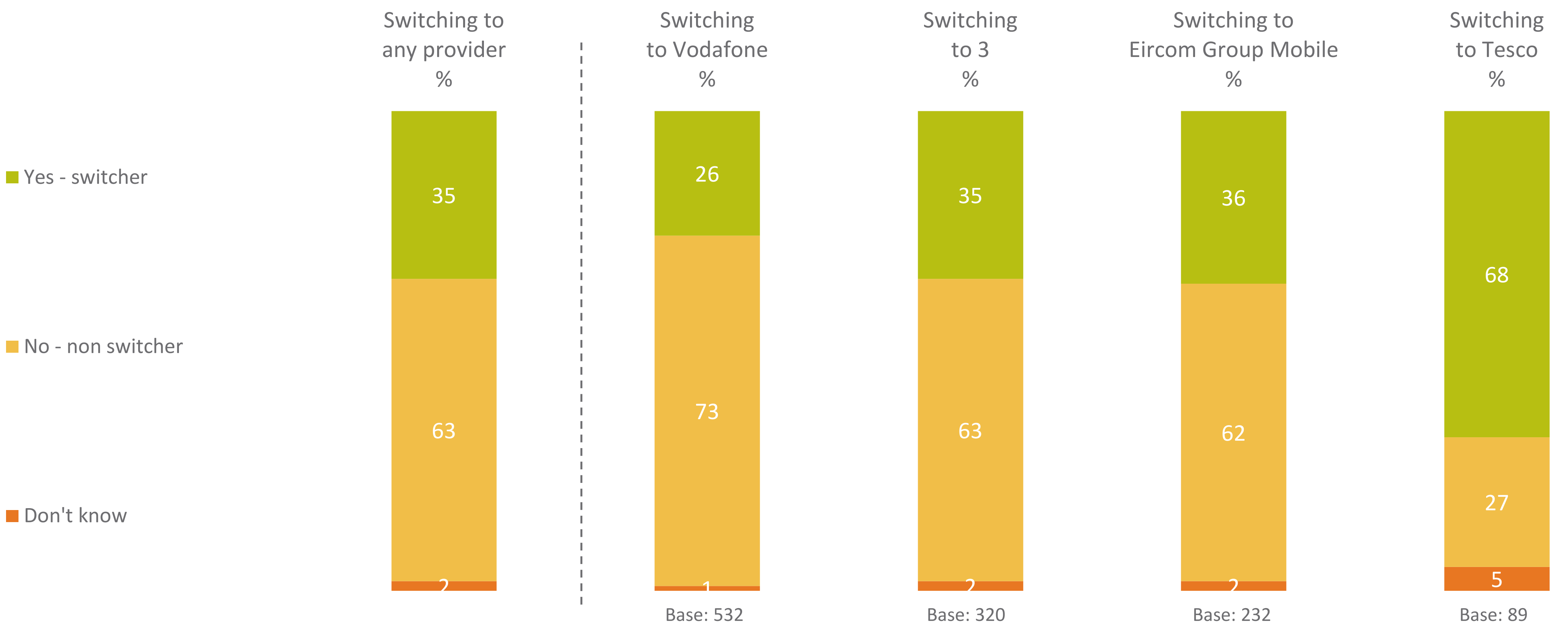
Just over a third have switched mobile phone provider at some stage. Those currently with Vodafone are less likely to have switched provider.

Mobile Phone - Incidence of Switching

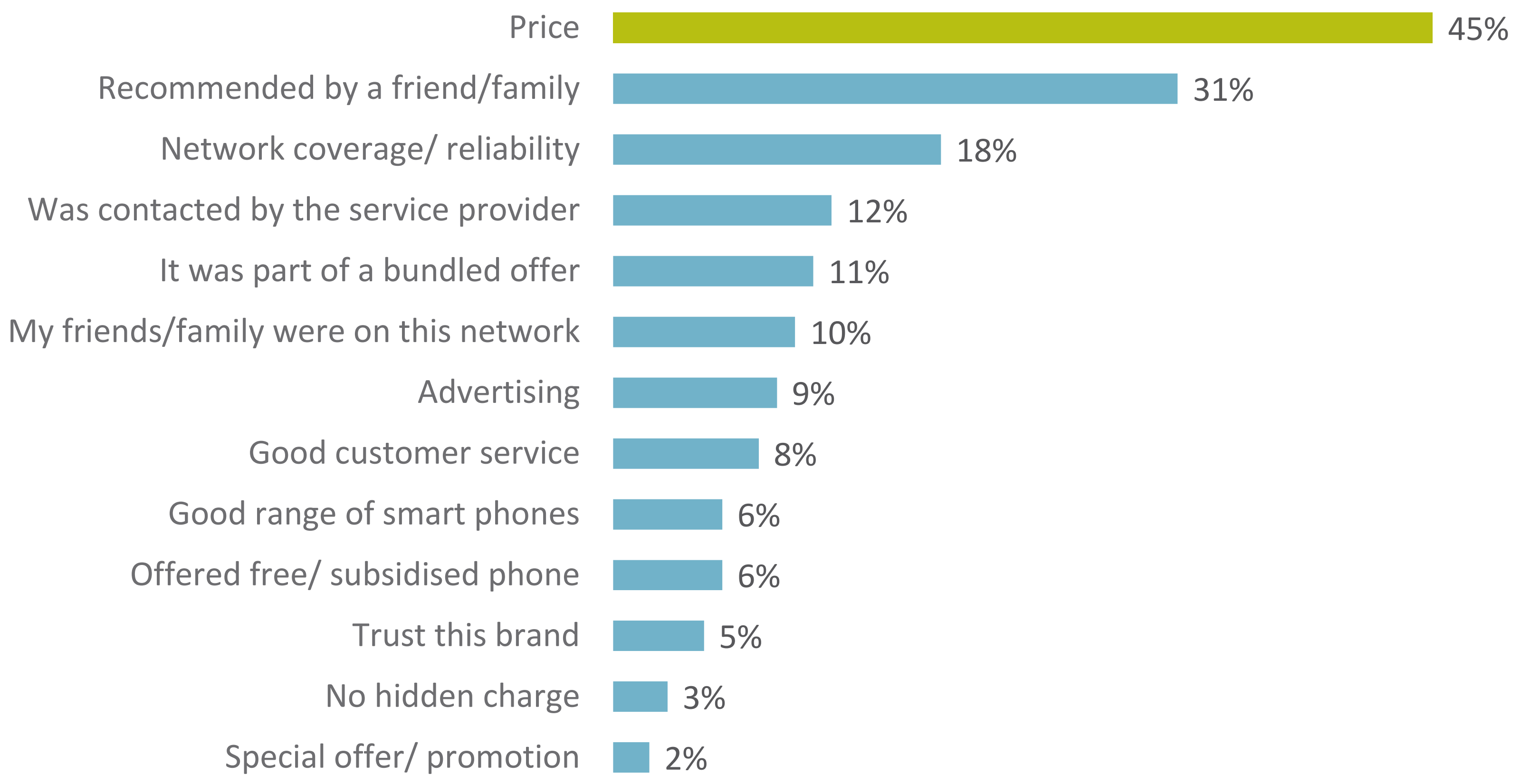


*Other Providers not shown due to small base sizes (<50).

Q.39b Have you previously purchased your mobile phone service from other provider(s)?
Base: 1,213 (non-bundled)

Price is the key motivator for selecting providers, although recommendation and network coverage feature strongly as other reasons.

Mobile Phone - Reasons for Selecting Provider



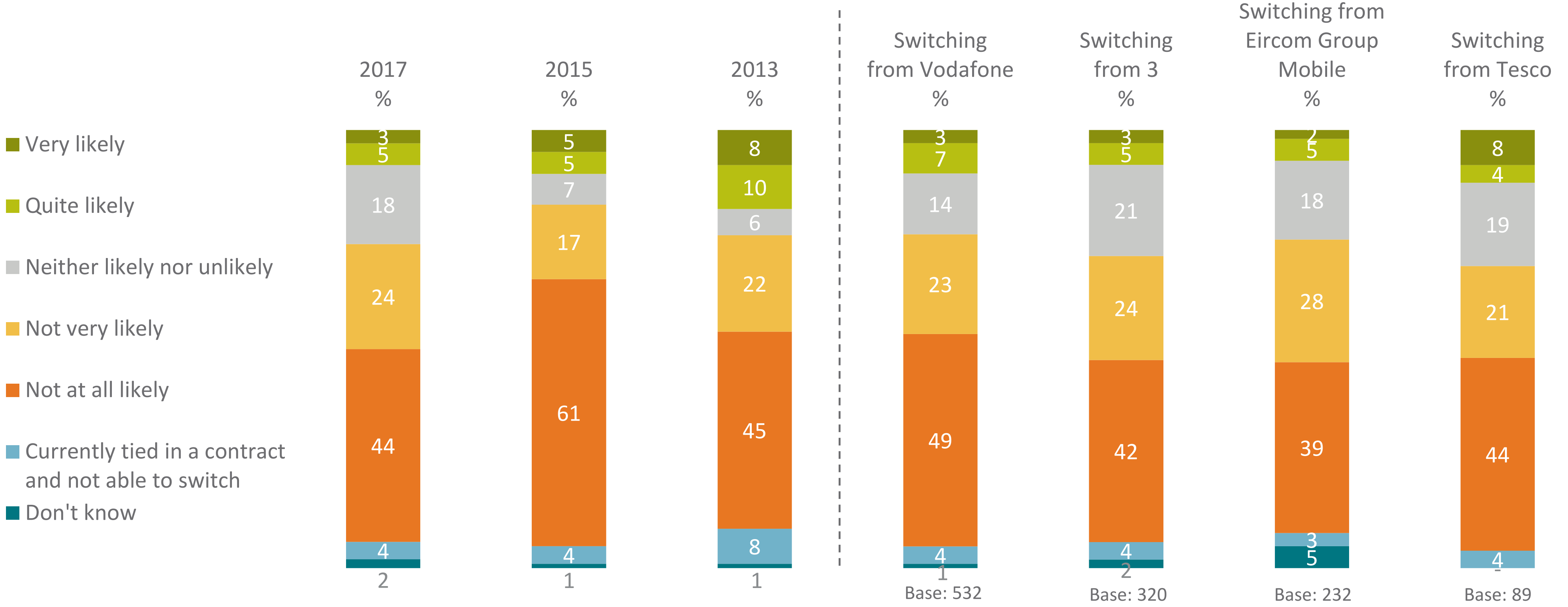
*Only mentions over 2%

Q.40 What prompted you to select this provider within the past year?

Base: 67 (non-bundled)

Intention to switch providers in the next 12 months is quite low, with over two-thirds indicating that they are not at all or not very likely to switch.

Mobile Phone - Likelihood to Switch Provider in the Next 12 Months



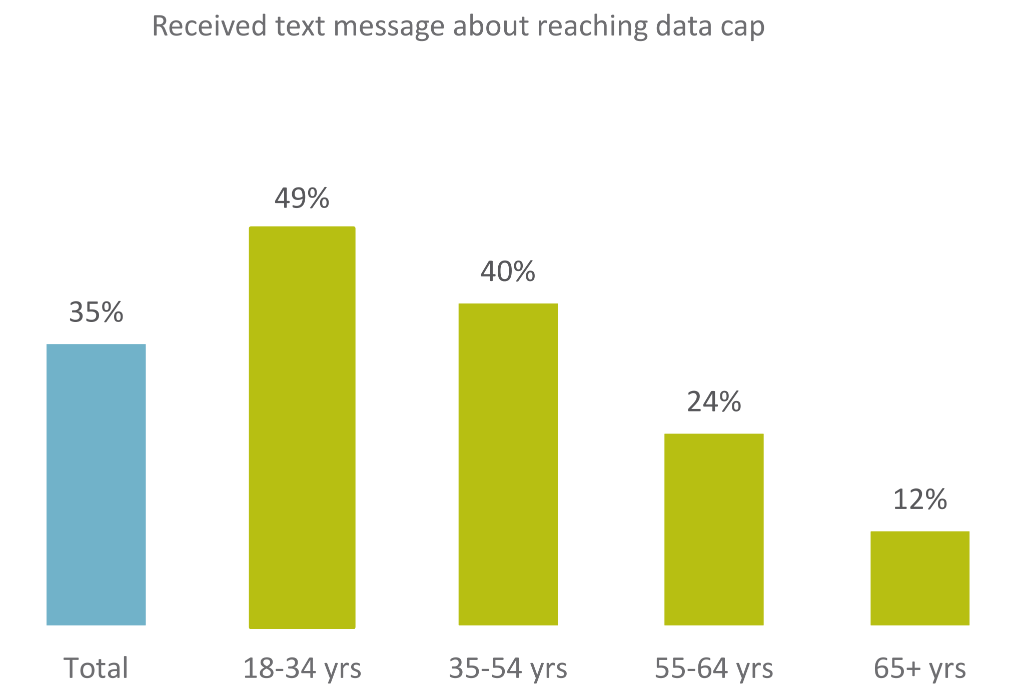
*Other Providers not shown due to small base sizes (<50).

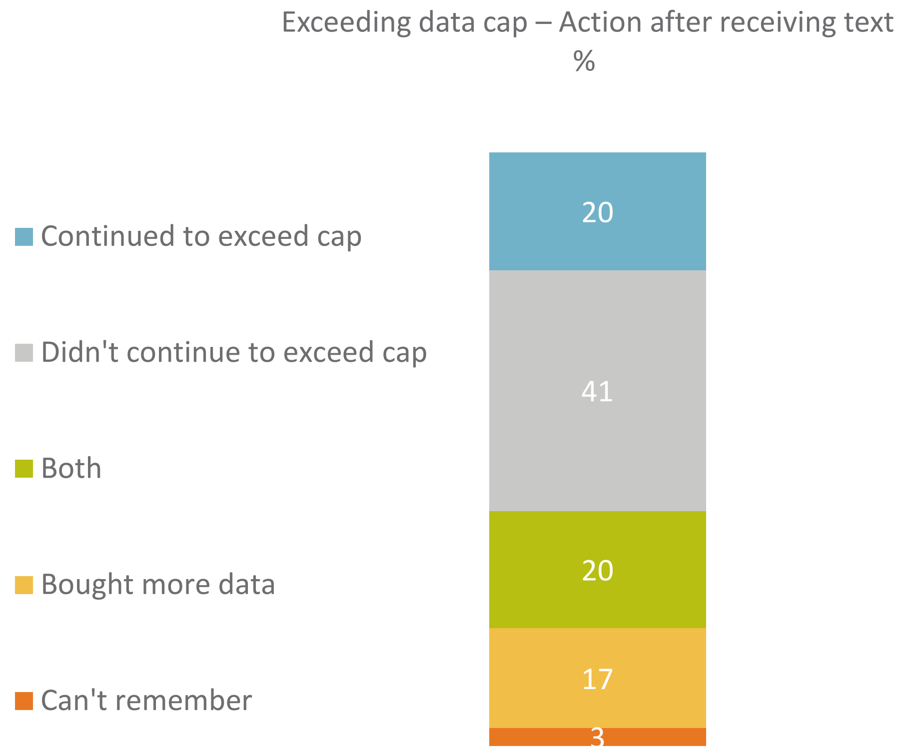
Q.45 How likely are you to consider switching mobile phone service provider within the next 12 months?

Base: 1,213 (non-bundled)

A third of consumers have received a text message in relation to reaching their data cap. This is more common among younger customers, with almost half of 18 to 34 year olds receiving this message.

Data Allowances



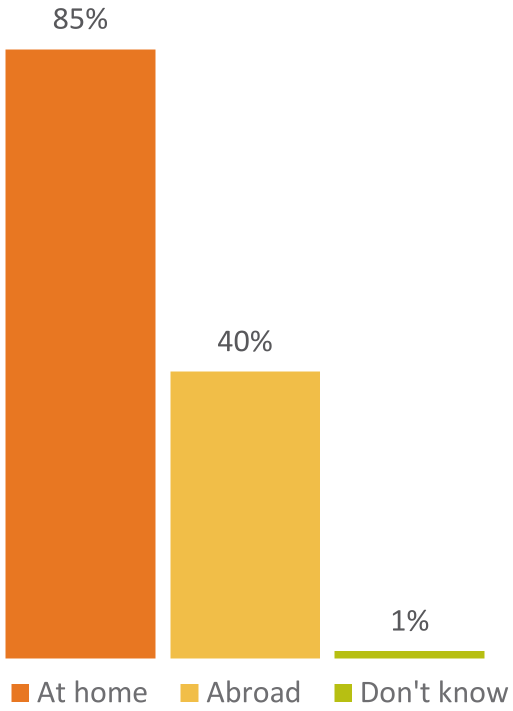


Q.47 Have you ever received a text message from your mobile provider which says that you are close to reaching your data allowance (while at home or abroad)?
Base: 1,468
Q.48 When you received this message, which of the following best describes what you usually did?
Base: 506

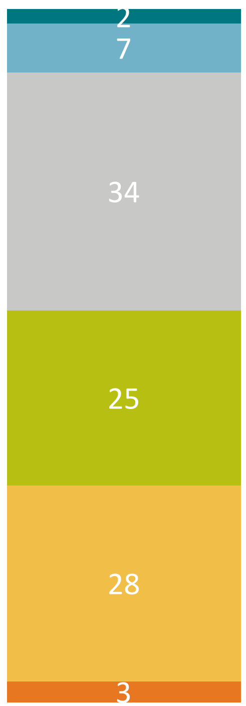
The vast majority of those receiving a message in relation to exceeding their data allowance were in Ireland at the time, however 2 out of 5 receiving a notification were roaming at the time.

Data Allowances

Exceeding data cap - Location



Frequency of exceeding data cap in past year
%



	Age			
	18-34	35-54	55-64	65+
	% (176)	% (237)	% (55)	% (38)*
9-12 times	2	1	3	-
5-8 times	10	7	5	-
2-4 times	37	33	33	26
Once	28	26	23	12
Never	20	30	36	53
Don't know	3	3	-	10

Q.47a Did this text message relate to exceeding your data allowance while at home, or abroad?
Base: 506
Q.89a How often have you exceeded your data allowance in the past 12 months?
Base: 506

* Caution, base size < 50.

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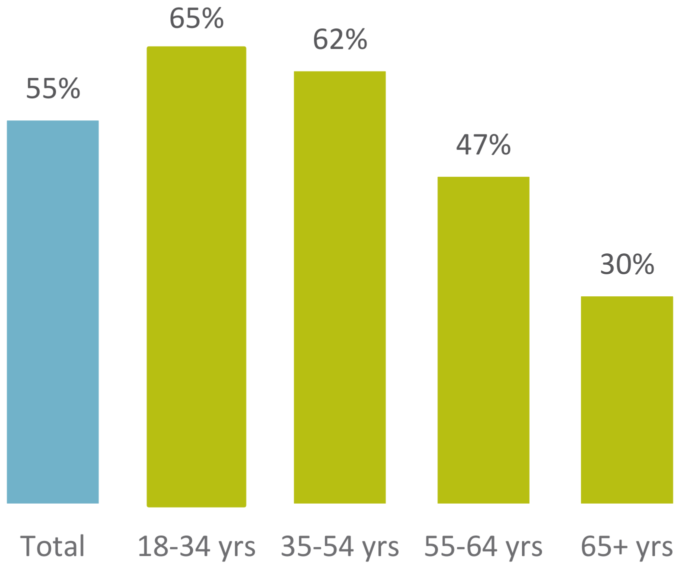
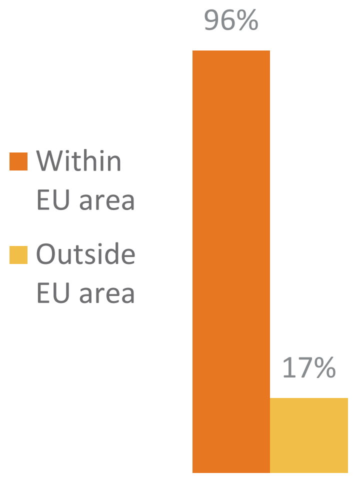
A majority of consumers have used roaming services in the past three years, with most of these doing so within the EU area.

Roaming

Roamed in the past 3 years

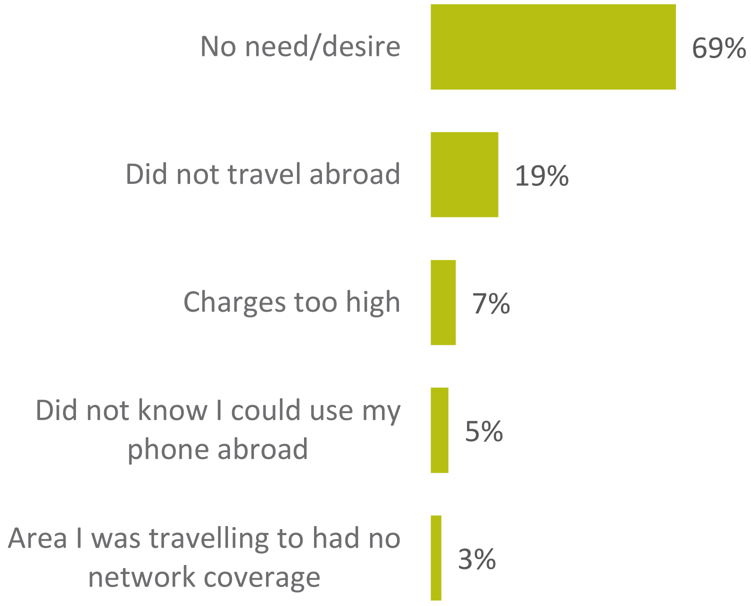


Places for roaming
%



Base: 778

Main reasons why people don't roam



Base: 683

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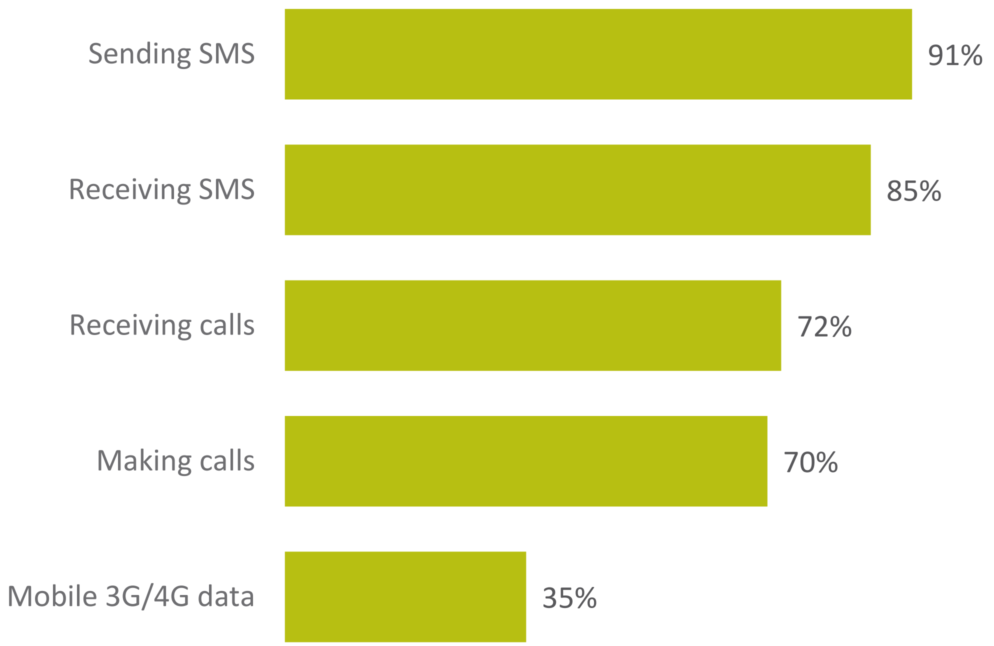
The vast majority of those using their mobile abroad used it for sending/receiving SMS, with call and data services less commonly used.

Roaming - Service Usage



Age				Social Class		
18-34	35-54	55-64	65+	ABC1	C2DE	F
% (233)	% (369)	% (98)	% (78)	% (434)	% (297)	% (47)*
91	94	85	85	92	91	77
86	90	77	73	86	85	71
75	71	69	75	75	69	62
70	70	71	64	73	66	63
45	37	26	9	37	33	28

* Caution, base size < 50.

Q.89c What services did you use while roaming abroad?
Base: 778 (All who roamed in past 3 years)

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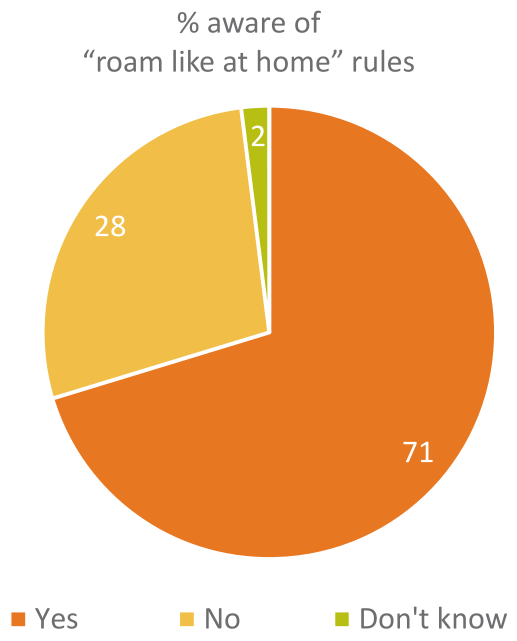
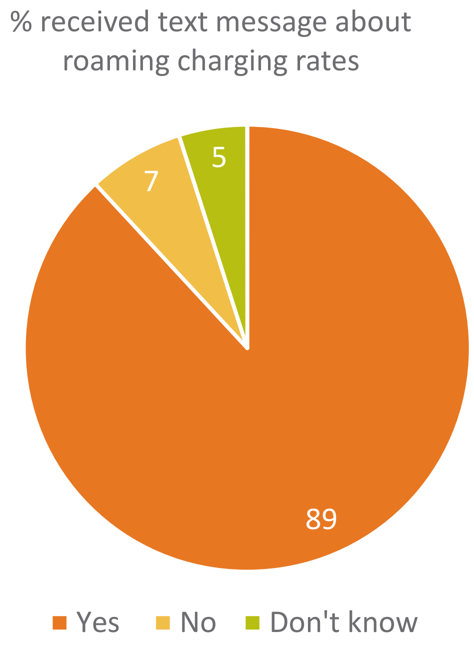
Nine in 10 people have received a message about roaming charges while abroad, in the past three years. Almost three-quarters are aware of the new "roam like at home" rules.

Roaming





Q.89g Have you heard about the new roaming rules in EU countries (15th June 2017) commonly referred to as "roam like at home" allowing you to use your mobile phone for calls texts and data at the same rates you incur at home?
Base: 1,461 (All respondents)

Q.89d Did you receive a message when you started to roam about the rates you would be charged for using your phone?
Base: 778 (All who roamed in past 3 years)

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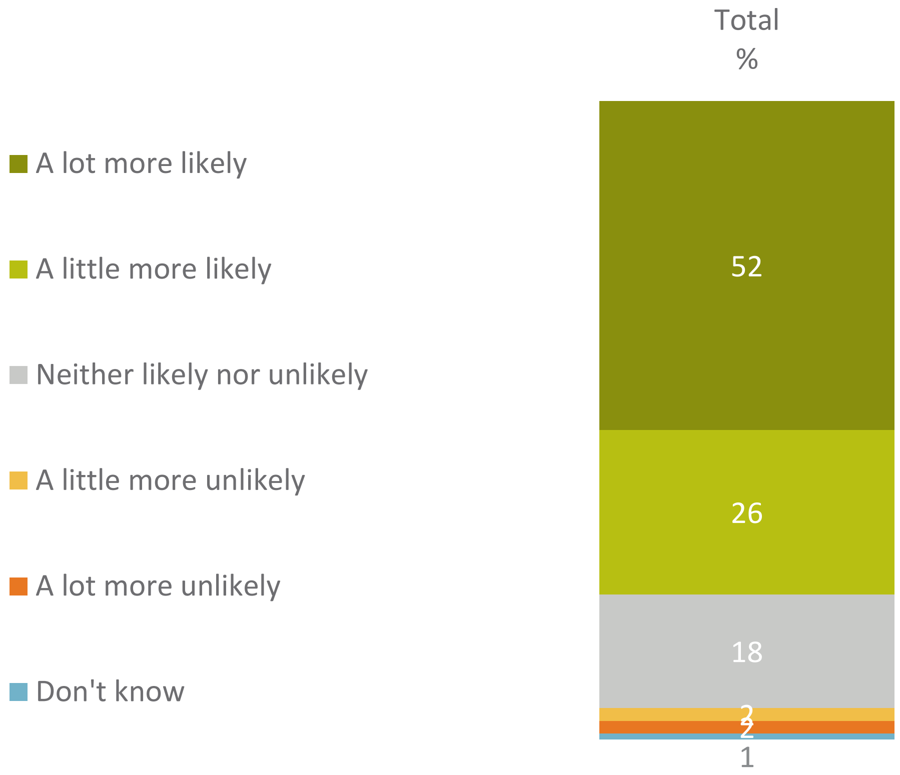
Over three-quarters say they are either a lot more likely or a little more likely to use their mobile phone abroad following the introduction of the new roaming rules.

Roaming- Likelihood to Roam



Age				Social Class		
18-34	35-54	55-64	65+	ABC1	C2DE	F
% (233)	% (369)	% (98)	% (78)	% (434)	% (297)	% (47)*
58	49	55	44	54	50	38
23	29	28	16	29	27	30
15	17	15	36	17	19	21
1	3	-	2	2	1	7
2	2	1	3	1	2	1
1	1	2	-	2	1	3

Q.89i How likely are you to use your mobile phone for roaming in another EU country since the introduction of the new roaming rules (15th June 2017)?
Base: 778 (All who have roamed in past three years)

* Caution, base size < 50.

Fixed Broadband Usage

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Laptops and smartphones are the most commonly connected devices to fixed broadband, with tablets being used by almost two-thirds of those with broadband.

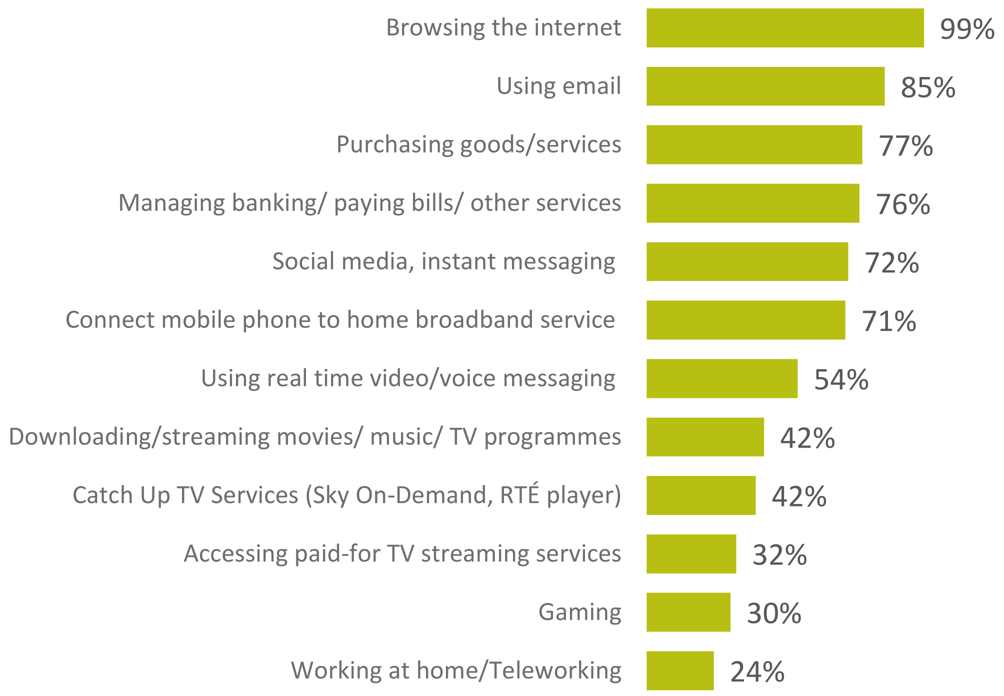
Fixed Broadband - Device Usage

	Total	2015	Age				Dependent Children	
			18-34	35-54	54-65	65+	Yes	No
			% (244)	% (472)	% (140)	% (140)	% (421)	% (575)
Laptop	84%	88%	82	88	79	80	84	85
Smart Phone	79%	70%	84	89	76	53	72	85
Tablet	65%	56%	70	69	62	44	57	71
Gaming Console	35%	24%	43	45	18	3	15	51
Smart TV	30%	18%	33	36	23	9	21	37
Mobile Internet Device	20%	15%	25	26	8	5	15	24
Desktop Computer	19%	22%	16	21	20	21	21	18
MP3/ Digital Music Player	16%	8%	18	20	7	7	12	19
eReader	13%	12%	11	17	14	4	9	17
None of the above	1%	N/A	-	-	3	3	2	-

Q.49 Which of the following devices are connected to your broadband service and used within your home?
Base: 996

The types of services used on broadband services varies considerably by both age and the presence of children in the household.

Fixed Broadband Services Usage

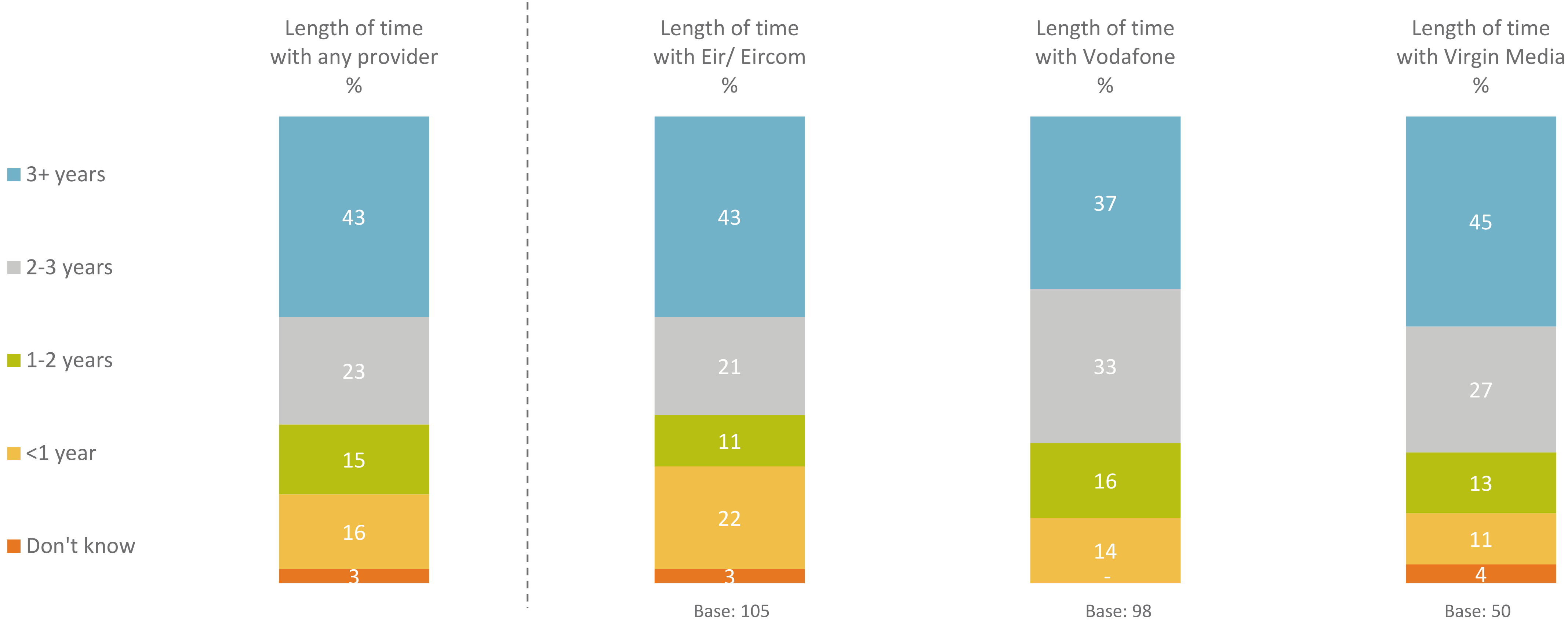


	2015	Age				Dependent Children	
		18-34	35-54	54-65	65+	Yes	No
		% (244)	% (472)	% (140)	% (140)	% (421)	% (575)
Browsing the internet	98%	99	99	100	97	98	99
Using email	88%	85	89	80	76	82	88
Purchasing goods/services	63%	87	82	72	49	70	83
Managing banking/ paying bills/ other services	65%	84	79	69	60	72	79
Social media, instant messaging	62%	85	81	36	36	59	83
Connect mobile phone to home broadband service	67%	83	76	61	45	62	79
Using real time video/voice messaging	52%	65	59	42	29	46	60
Downloading/streaming movies/ music/ TV programmes	32%	49	51	26	12	32	49
Catch Up TV Services (Sky On-Demand, RTÉ player)	31%	42	46	30	17	22	40
Accessing paid-for TV streaming services	23%	36	39	25	8	22	40
Gaming	30%	39	38	13	3	16	42
Working at home/Teleworking	17%	25	27	23	11	29	29

Q.52 What do you and other members in your household use your home fixed broadband service for?
Base: 996

43% have been with their fixed broadband provider for 3 or more years, with 16% having joined their provider within the past year.

Fixed Broadband - Length of Time with Provider



*Other Providers not shown due to small base sizes (<50).

Q.57a How long have you had your fixed broadband service for?
Base: 401 (non-bundled)

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Fixed Broadband - Length of Time with Provider

		Age				Region		
	Total	18-34	35-54	55-64	65+	Urban	Semi-Rural	Rural
	%	% (110)	% (191)	% (43)*	% (57)	% (123)	% (140)	% (138)
3+ years	43	32	44	53	62	39	50	52

Q.57a How long have you had your fixed broadband service for?
Base: 401 (non-bundled)

* Caution, base size < 50.

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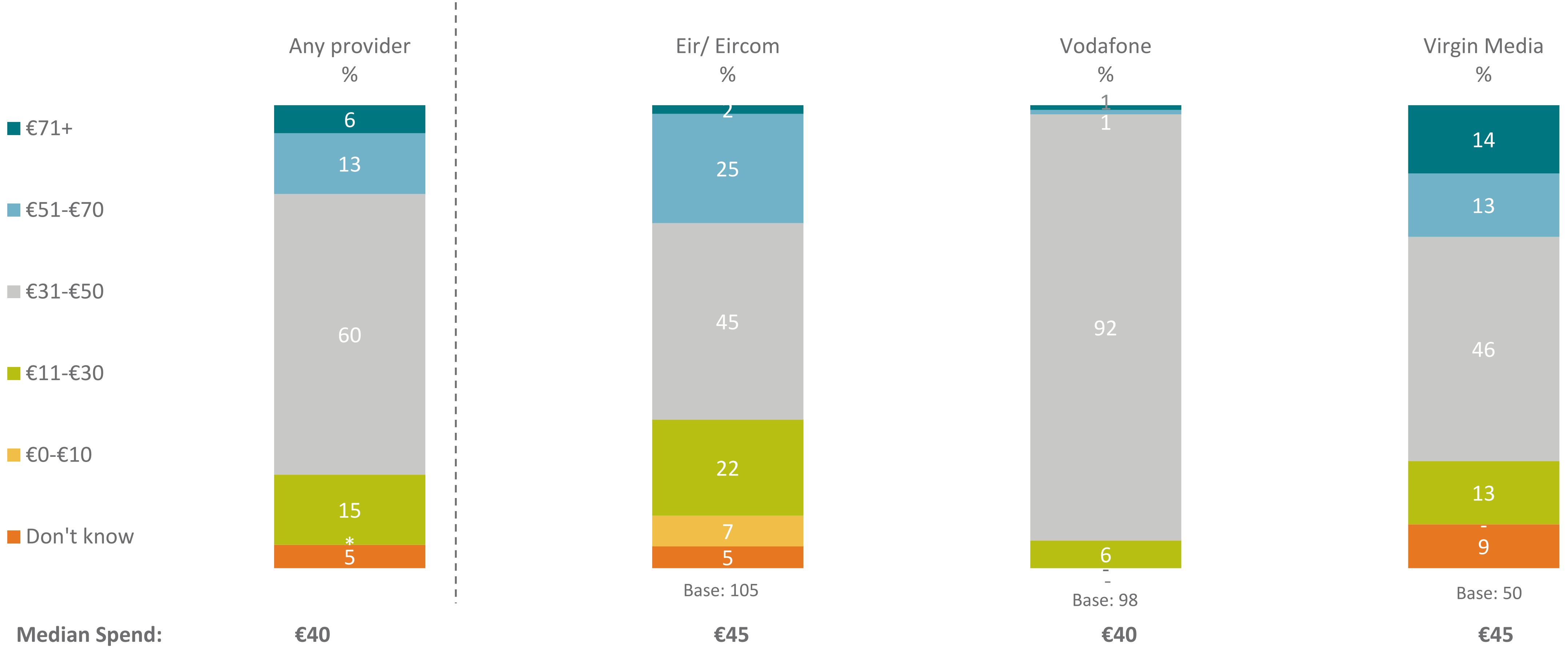
The median spend on unbundled broadband services is €40, with a similar median spend across all providers.

Fixed Broadband - Monthly Spend



*Other Providers not shown due to small base sizes (<50).

Q.50b How much do you pay per month for this service?
Base: 321 (non-bundled)

Fixed Broadband - Monthly Spend

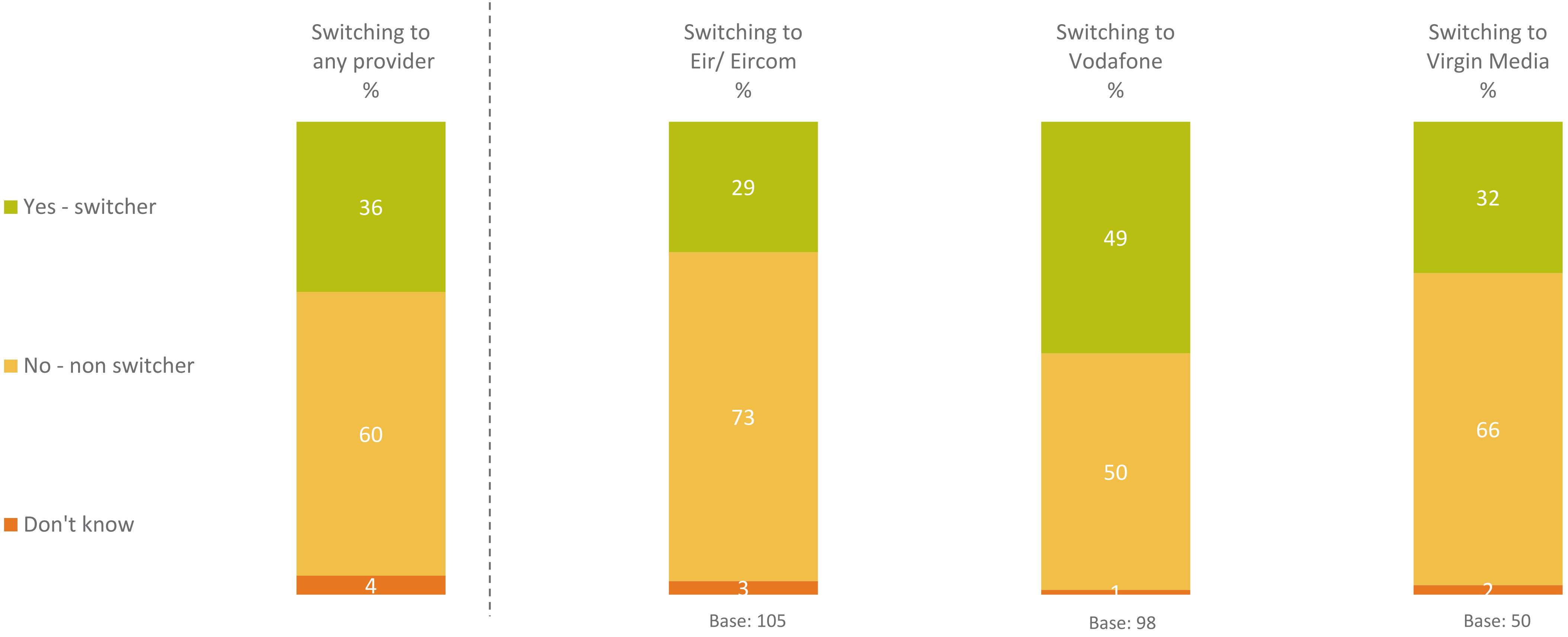
		Age				Region		
	Total	18-34	35-54	55-64	65+	Urban	Semi-Rural	Rural
		(88)	(160)	(28)*	(45)*	(95)	(115)	(111)
Median Spend	€40	€40	€45	€45	€40	€41	€40	€40

* Caution, base size < 50.

Q.50b How much do you pay per month for this service?
Base: 321 (non-bundled)

Just over a third have switched their fixed broadband to a different provider. Half of those currently with Vodafone have switched to this provider.

Fixed Broadband - Incidence of Switching

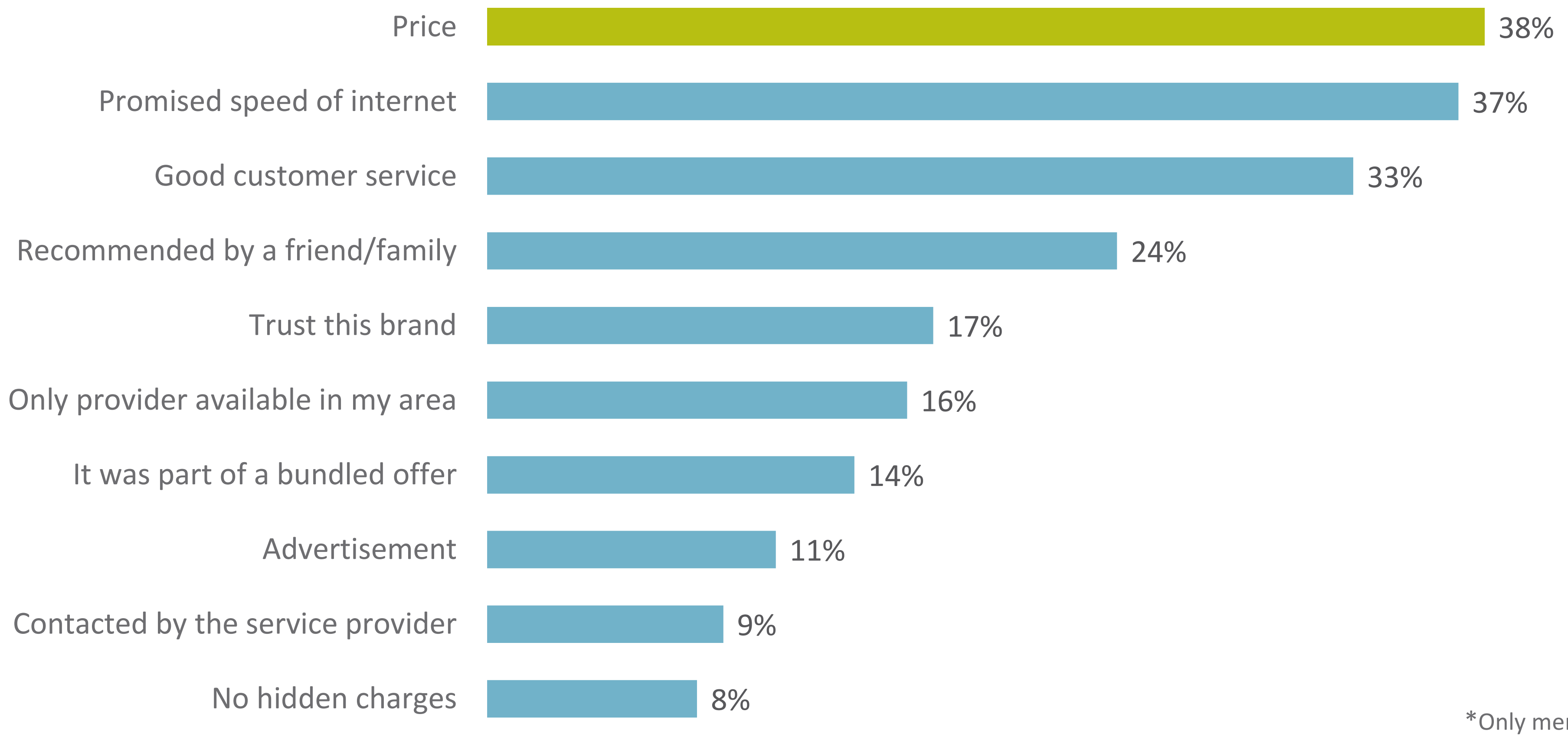


*Other Providers not shown due to small base sizes (<50).

Q.57b Have you previously purchased this service from other provider(s)?
Base: 401 (non-bundled)

Unlike with other services, price is not the dominant motivation for selecting provider, with internet speeds and customer service also influencing behaviours.

Fixed Broadband - Reasons for Selecting Provider



*Only mentions over 2%

** Caution, base size < 50.

Q.58 Why did you select this provider within the past year?
Base: 33 (non-bundled)

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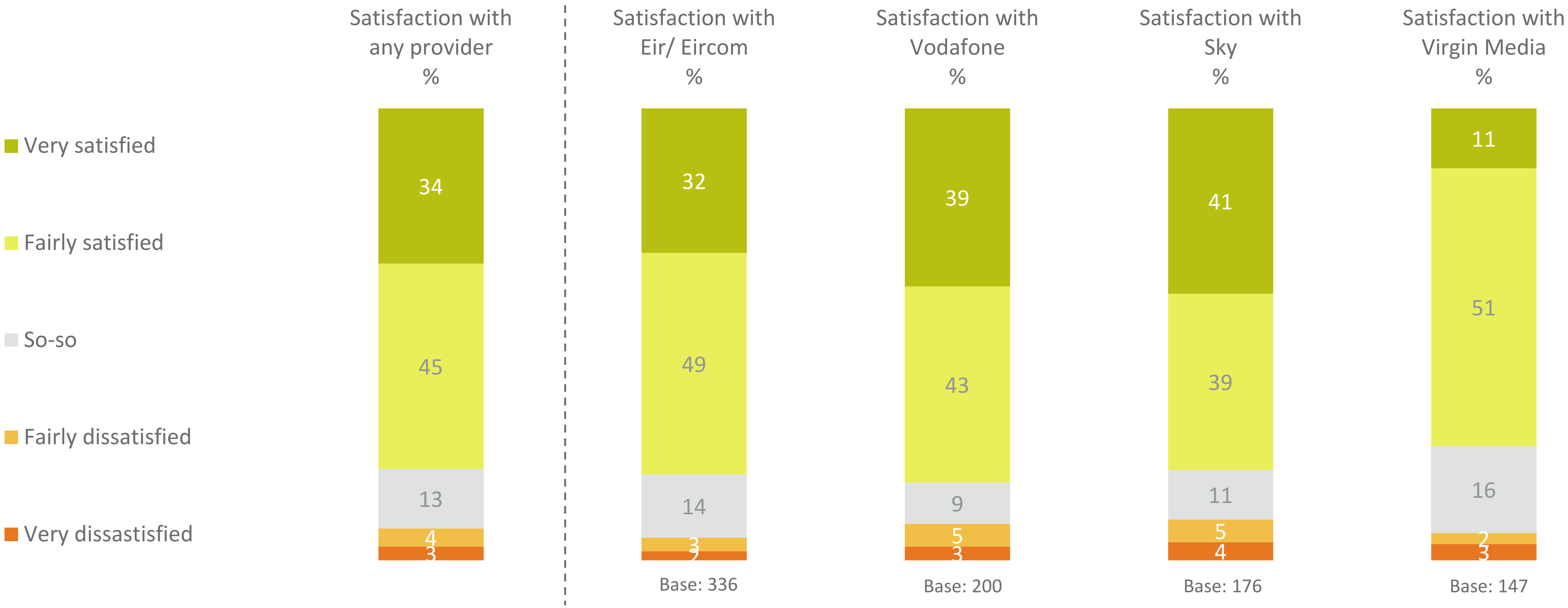
The vast majority of customers are satisfied with their fixed broadband supplier, although satisfaction with Virgin Media is lower than that for other providers.

Fixed Broadband - Overall Satisfaction with Provider

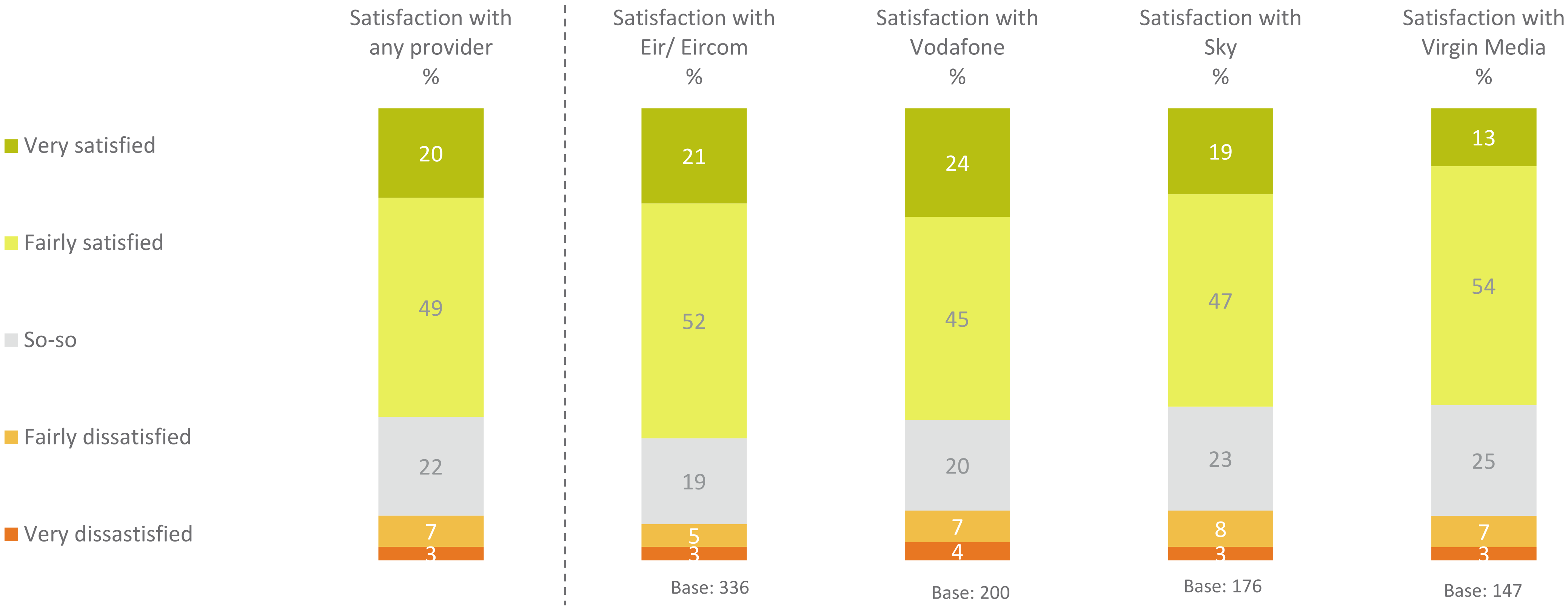


*Other Providers not shown due to small base sizes (<50).

Q.56 Out of 10, where 1 is very dissatisfied and 10 is very satisfied, how satisfied are you with your fixed broadband supplier?
Base: 996

Satisfaction with the cost charged by fixed broadband suppliers is generally high, with consistency across each supplier in this respect

Fixed Broadband – Satisfaction with Provider (Cost)



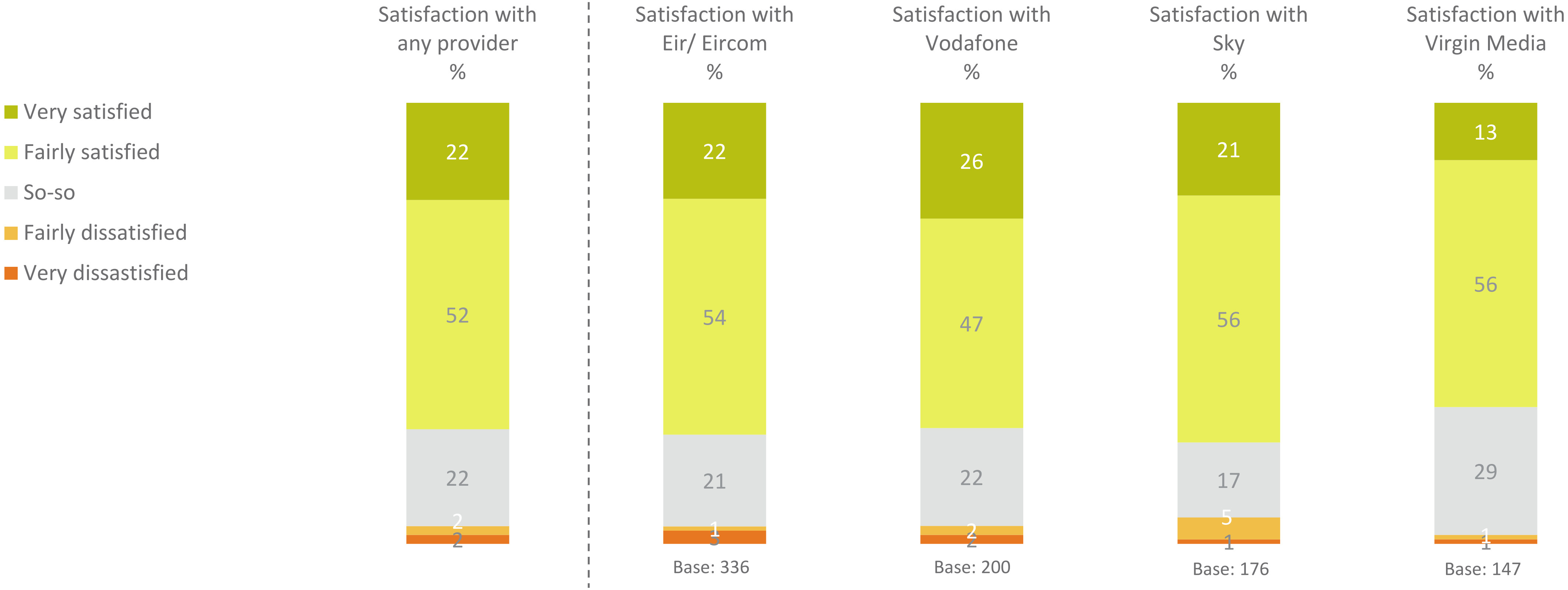
*Other Providers not shown due to small base sizes (<50).

Q.56b Out of 10, where 1 is very dissatisfied and 10 is very satisfied, how satisfied are you with the following aspects of service you receive from this supplier?*Cost

Base: 996

Satisfaction with length of contract is generally high across all suppliers.

Fixed Broadband - Satisfaction with Provider (Length of Contract)



*Other Providers not shown due to small base sizes (<50).

Q.56b Out of 10, where 1 is very dissatisfied and 10 is very satisfied, how satisfied are you with the following aspects of service you receive from this supplier?*Length of Contract

Base: 996

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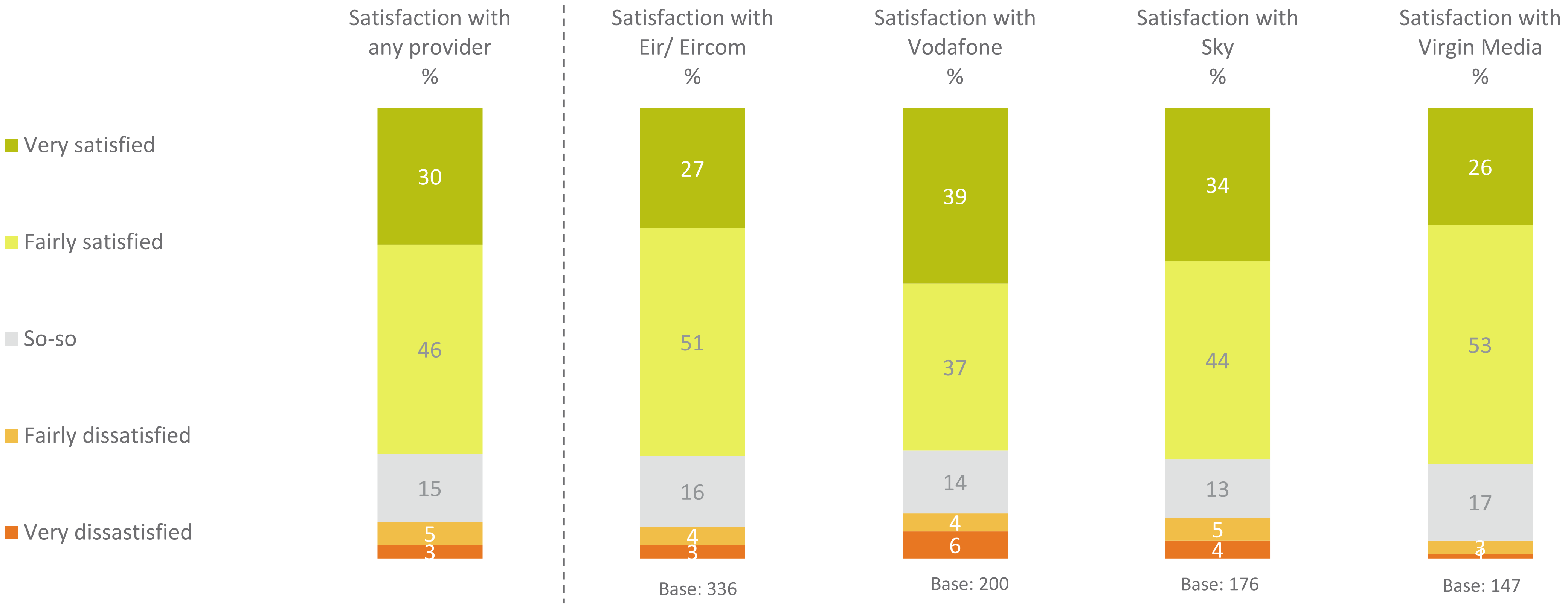
Three-quarters are satisfied with their broadband coverage/reliability, although the proportions that are very satisfied are lower for both Eir and Virgin Media.

Fixed Broadband - Satisfaction with Provider (Reliability)



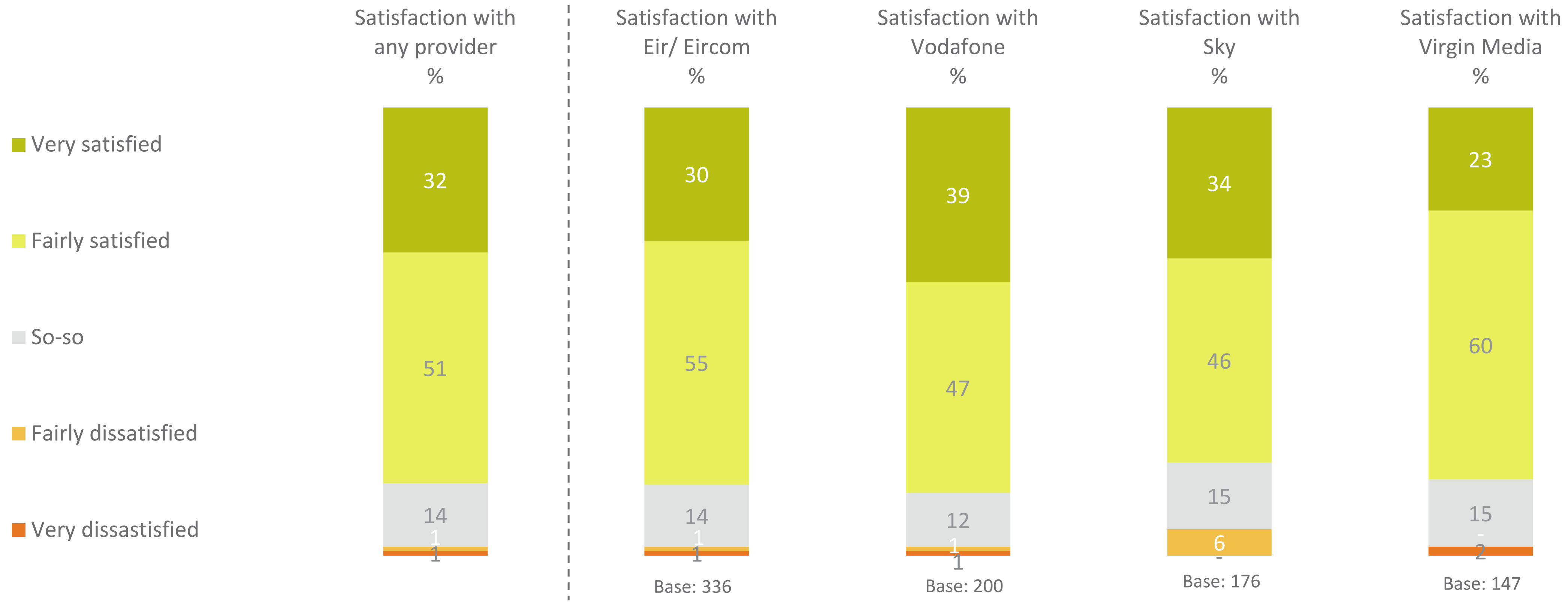
*Other Providers not shown due to small base sizes (<50).

Q.56b Out of 10, where 1 is very dissatisfied and 10 is very satisfied, how satisfied are you with the following aspects of service you receive from this supplier?*Reliability

Base: 996

Over 4 out of 5 customers are satisfied with the billing accuracy by their provider.

Fixed Broadband – Satisfaction with Provider (Billing Accuracy)



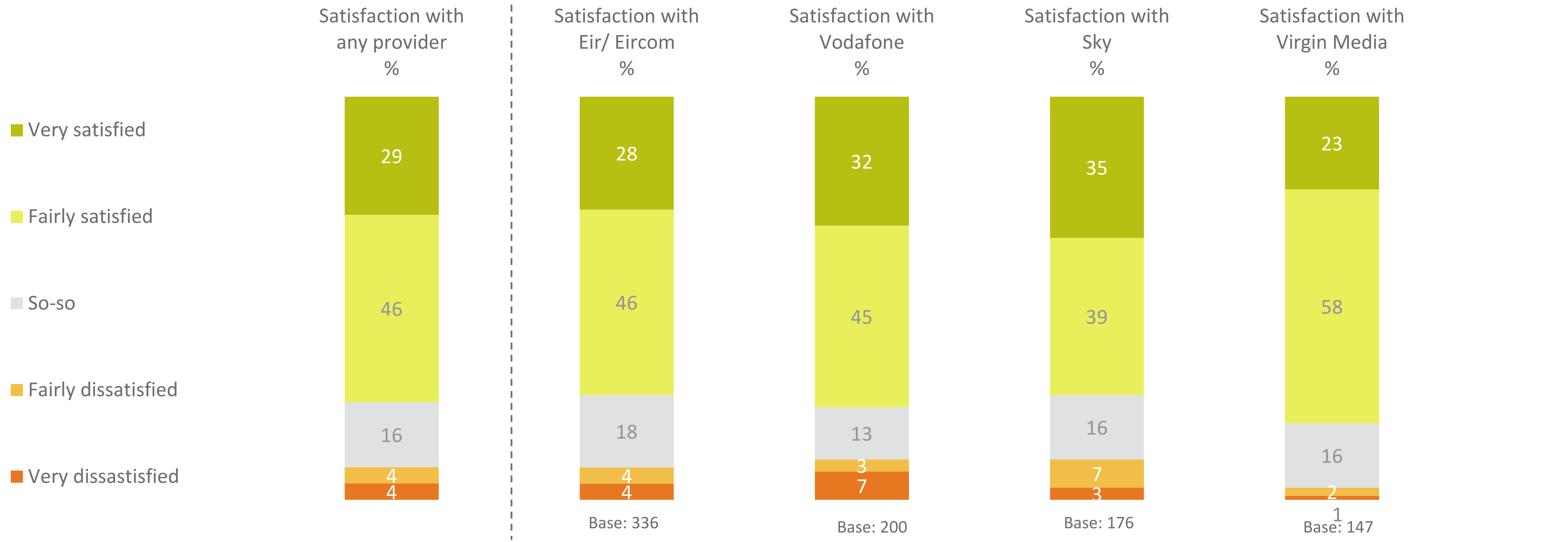
*Other Providers not shown due to small base sizes (<50).

Q.56b Out of 10, where 1 is very dissatisfied and 10 is very satisfied, how satisfied are you with the following aspects of service you receive from this supplier?*Billing Accuracy

Base: 996

Three-quarters are satisfied with the speeds they receive on their fixed broadband, although satisfaction levels with Virgin Media are lower than for other providers

Fixed Broadband - Satisfaction with Provider (Actual Speed Experienced)



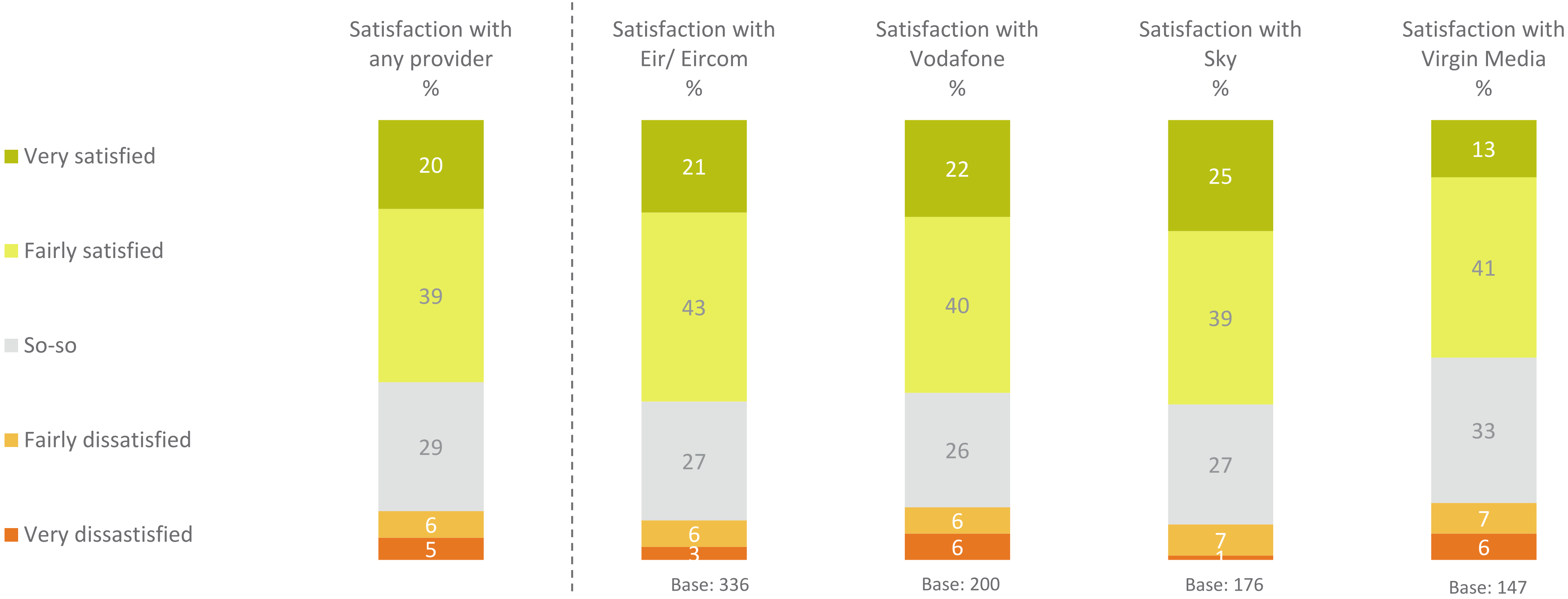
*Other Providers not shown due to small base sizes (<50).

Q.56b Out of 10, where 1 is very dissatisfied and 10 is very satisfied, how satisfied are you with the following aspects of service you receive from this supplier?*Actual Speed Experienced

Base: 996

Satisfaction with offers and promotions is lower than satisfaction with other dimensions (although it may be the case that many customers do not receive any offers or promotions).

Fixed Broadband - Satisfaction with Provider (Offers and Promotions)



Q.56b Out of 10, where 1 is very dissatisfied and 10 is very satisfied, how satisfied are you with the following aspects of service you receive from this supplier?*Offers and Promotions

Base: 996

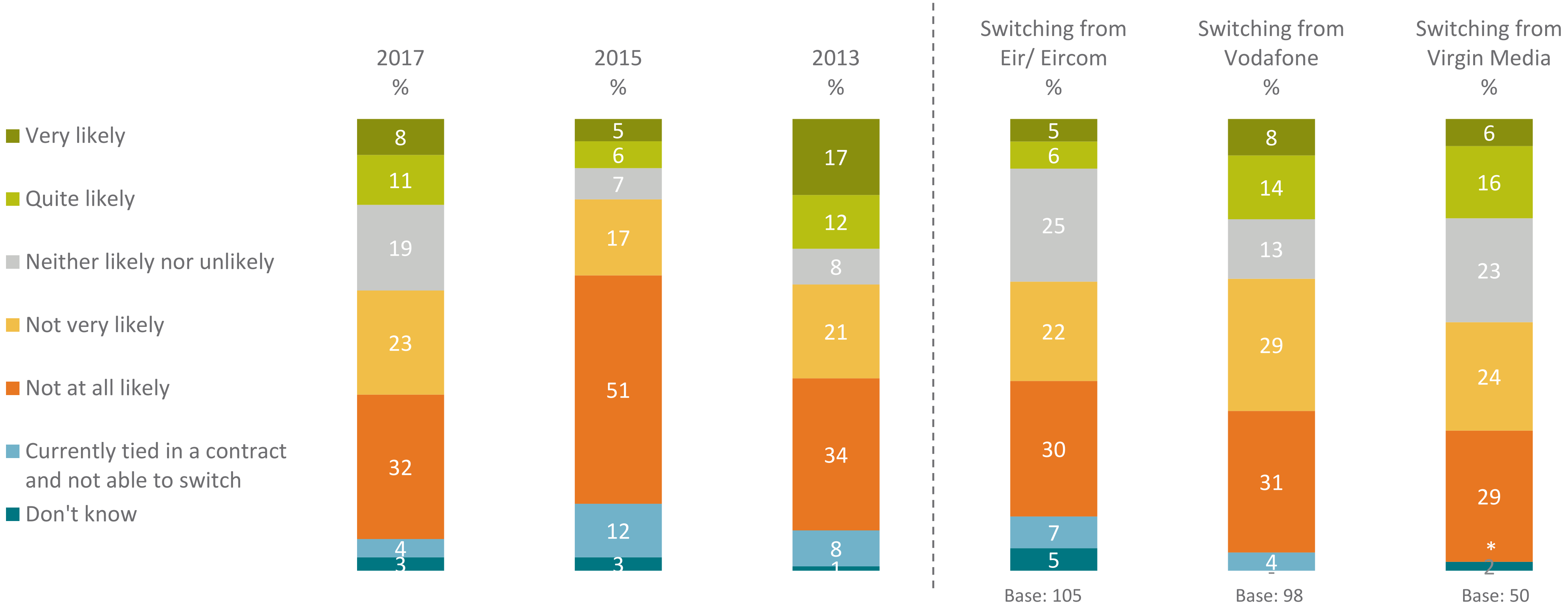
Fixed Broadband - Satisfaction with Provider

	Total	Age				Region		
	Total	**18-34**	**35-54**	**55-64**	**65+**	**Urban**	**Semi-Rural**	**Rural**
	%	% (244)	% (472)	% (140)	% (140)	% (379)	% (330)	% (287)
Overall	80	79	79	77	85	80	76	84
Cost	68	69	67	66	73	68	67	74
Length of contract	74	73	73	72	79	73	72	80
Coverage/ Reliability	77	72	78	72	82	78	70	82
Actual Speed Experienced	76	73	77	71	81	78	69	76
Billing Accuracy	83	81	84	82	87	83	82	90
Offers & Promotions	60	61	58	56	67	61	55	67

Q.56b Out of 10, where 1 is very dissatisfied and 10 is very satisfied, how satisfied are you with the following aspects of service you receive from this supplier?
Base: 996

1 in 5 broadband customers outside a bundle suggest that they are likely to switch provider in the next 12 months. Those with Eircom are less likely to switch than those with other providers.

Fixed Broadband - Likelihood to Switch Provider in the Next 12 Months



*Other Providers not shown due to small base sizes (<50).

Q.61 How likely are you to consider switching your fixed home broadband supplier within the next 12 months?
Base: 401 (non-bundled)

Mobile Broadband Usage

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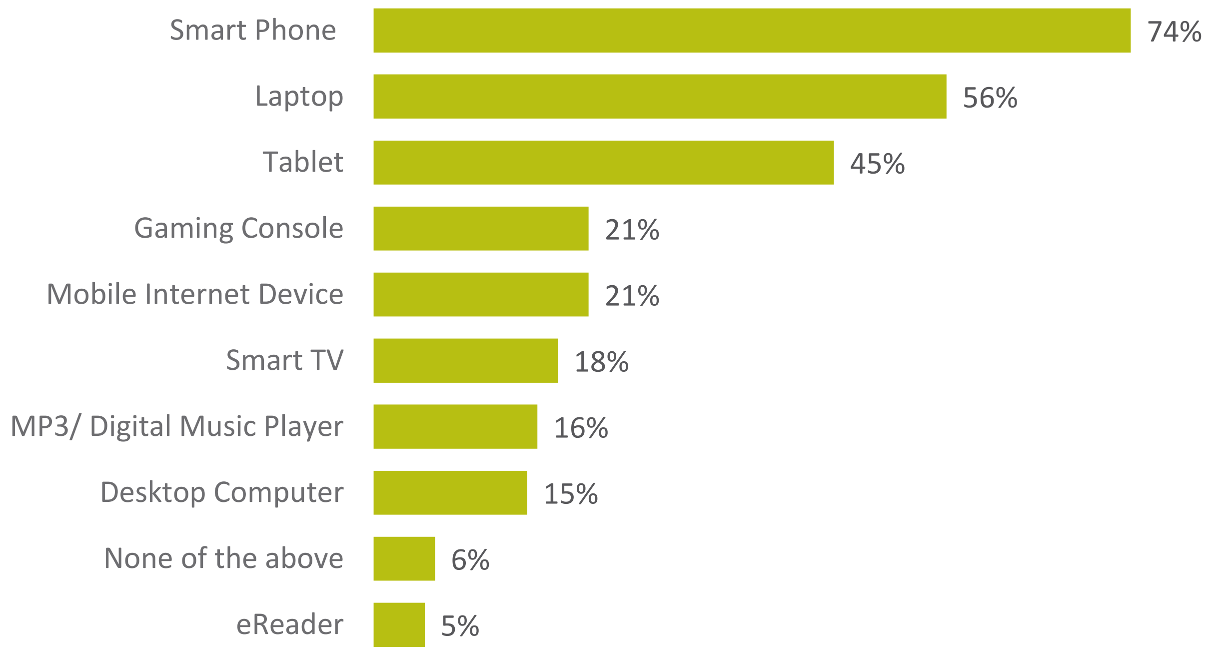
The services being connected to mobile broadband are similar to those connected to fixed broadband. However, with 74% indicating that they connect their smartphone, there could be confusion between mobile broadband and 3G/4G services used on mobile phones.

Mobile Broadband - Device Usage



Age				Social Class		
18-34	35-54	55-64	65+	ABC1	C2DE	F
% (112)	% (168)	% (44)*	% (34)*	% (184)	% (152)	% (22)*
80	77	59	58	79	70	54
59	50	62	60	58	52	74
45	47	39	42	49	41	27
28	24	4	5	27	20	15
27	22	12	7	27	14	15
20	20	11	7	23	12	3
21	14	12	11	21	10	-
14	14	12	21	17	12	12
2	8	6	6	7	4	3
10	3	3	2	7	4	3

* Caution, base size < 50.

Q.66 Which of the following devices are connected to your mobile broadband service?
Base: 358

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Mobile broadband is used for similar services to fixed broadband and mobile data services.

Mobile Broadband Services Usage

	Total	Age				Social Class		
		18-34	35-54	55-64	65+	ABC1	C2DE	F
		% (112)	% (168)	% (44)*	% (34)*	% (184)	% (152)	% (22)*
Browsing the internet	93%	98	93	82	91	90	96	100
Using email	75%	84	76	59	63	83	67	67
Using real time video/voice messaging	75%	59	48	34	19	54	40	30
Social media, instant messaging	65%	78	70	37	35	69	60	60
Managing banking/ paying bills/ other services	62%	71	69	42	27	72	51	47
Purchasing goods/services	58%	72	63	25	29	64	50	50
Connect mobile phone to home broadband service via Wi-Fi	57%	56	63	51	42	66	47	47
Downloading/streaming movies/ music/ TV programmes	26%	41	27	6	-	28	25	12
Working at home/Teleworking	23%	36	18	25	-	32	14	7
Catch Up TV Services (Sky On-Demand, RTÉ player)	21%	29	22	11	5	25	17	8
Paid for TV streaming	19%	28	18	11	5	23	16	-
Gaming	16%	21	18	6	5	19	14	4
Accessing paid-for TV streaming services	3%	-	3	8	1	2	4	-

* Caution, base size < 50.

Q.67 What do you use your mobile broadband service for?
Base: 358

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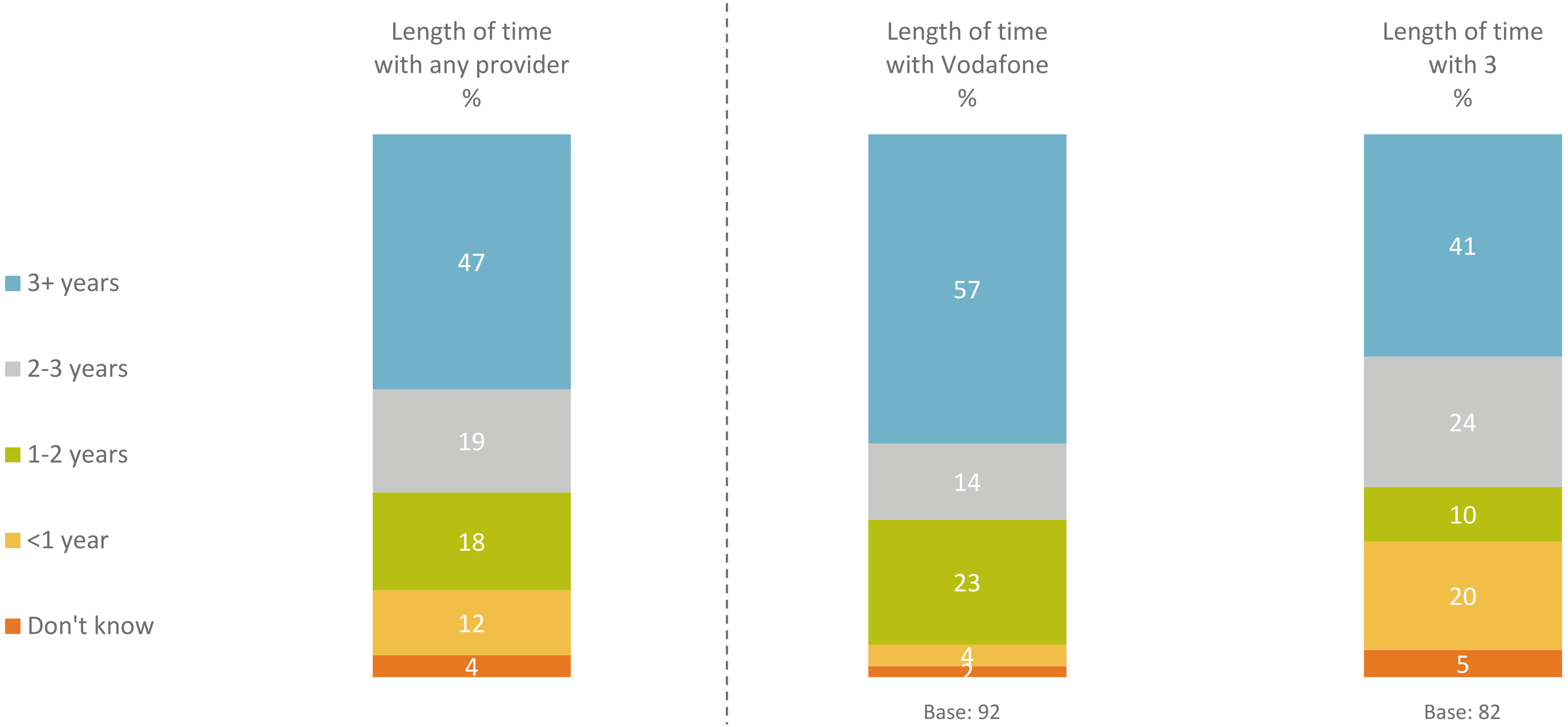
Users typically have established relationships with their mobile broadband provider, with almost half having been with the provider for 3 or more years.

Mobile Broadband - Length of Time with Provider



Q.73 How long have you had your mobile broadband service for?
Base: 268 (non-bundled)

Mobile Broadband - Length of Time with Provider

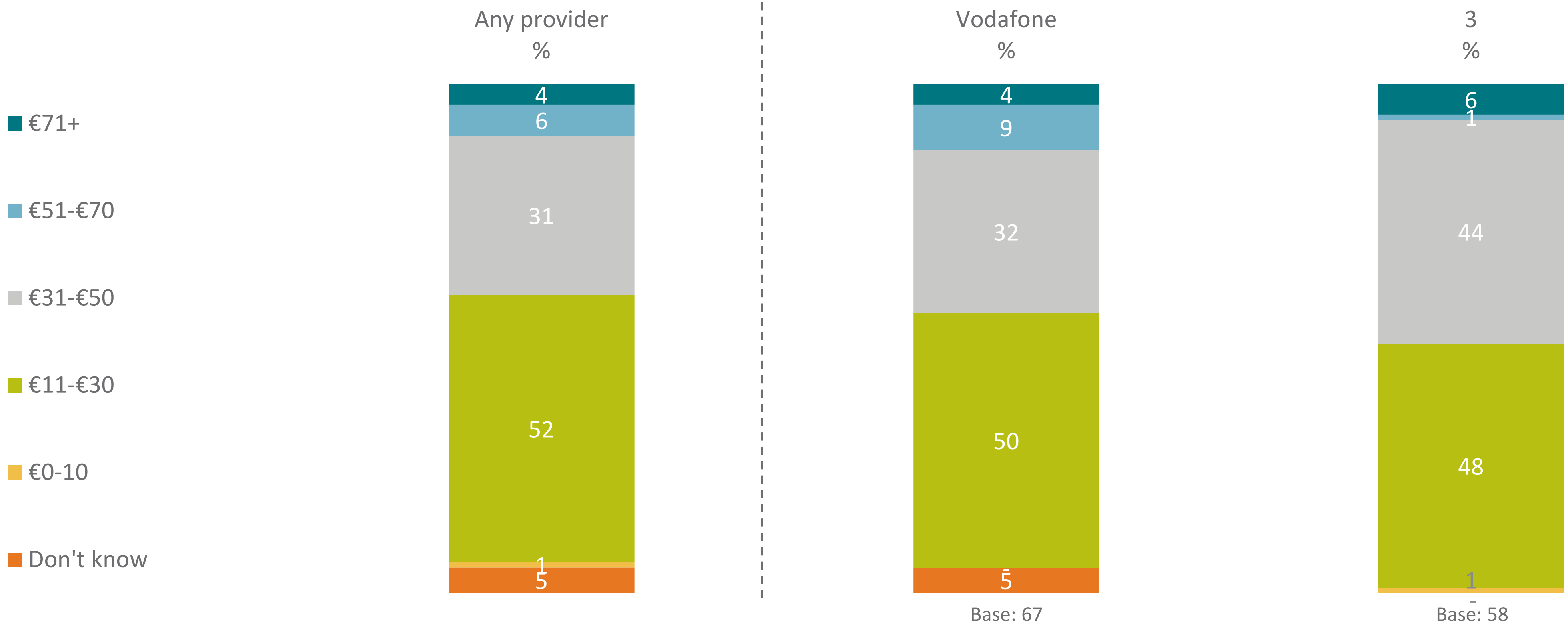
		Age				Region		
	Total	18-34	35-54	55-64	65+	Urban	Semi-Rural	Rural
	%	% (80)	% (126)	% (35)*	% (27)*	% (112)	% (65)	% (91)
3+ years	47	39	54	49	43	44	53	61

* Caution, base size < 50.

Q.73 How long have you had your mobile broadband service for?
Base: 268 (non-bundled)

The median spend on mobile broadband services is €30 per month.

Mobile Broadband - Monthly Spend



Median Spend: **€30** **€30** **€32**

*Other Providers not shown due to small base sizes (<50).

Q.71b How much do you pay per month for your mobile broadband service?
Base: 198 (non-bundled)

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Mobile Broadband - Monthly Spend

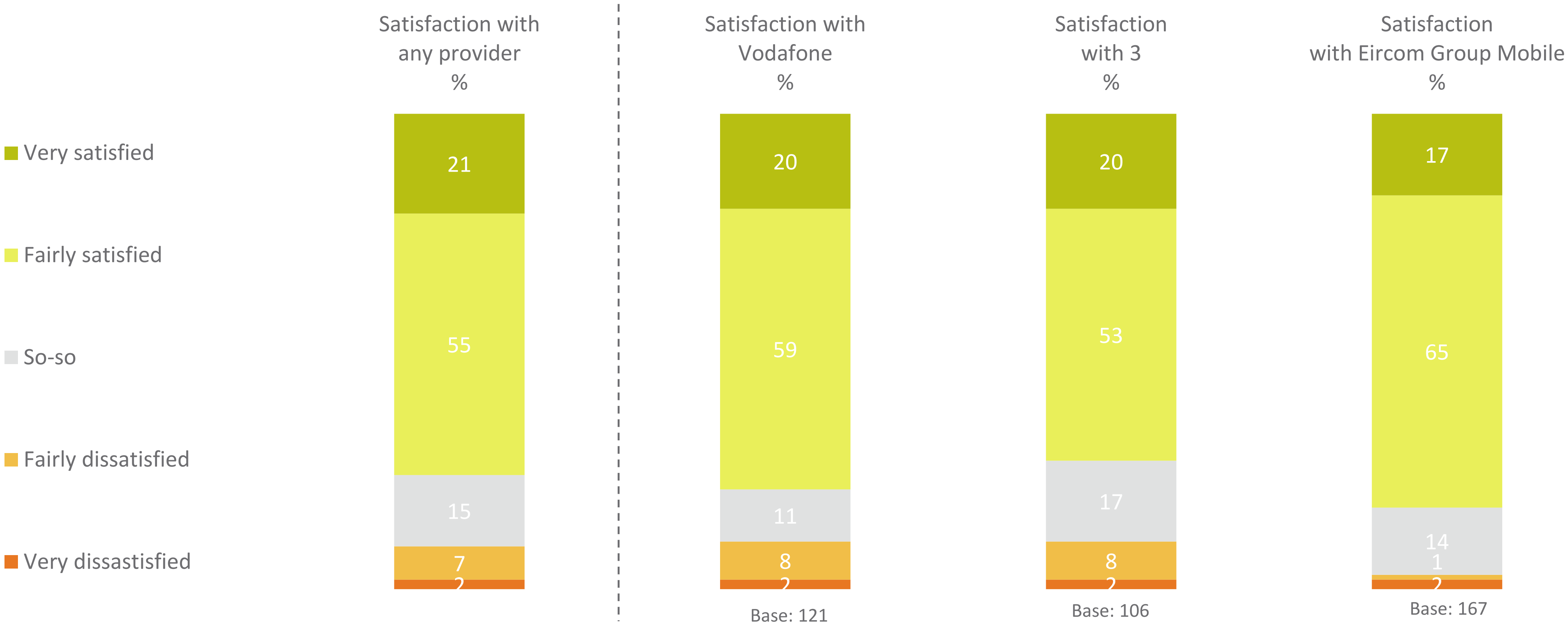
		Age				Region		
	Total	18-34	35-54	55-64	65+	Urban	Semi-Rural	Rural
		(58)	(97)	(24)*	(19)*	(75)	(54)	(69)
Median Spend	€30	€30	€30	€25	€30	€30	€32	€30

* Caution, base size < 50.

Q.71b How much do you pay per month for your mobile broadband service?
Base: 198 (non-bundled)

Over three-quarters of users are satisfied with their mobile broadband provider.

Mobile Broadband - Overall Satisfaction with Provider



Q.65a Out of 10, where 1 is very dissatisfied and 10 is very satisfied, how satisfied are you with your mobile broadband supplier?
Base: 358

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Mobile Broadband - Overall Satisfaction with Provider

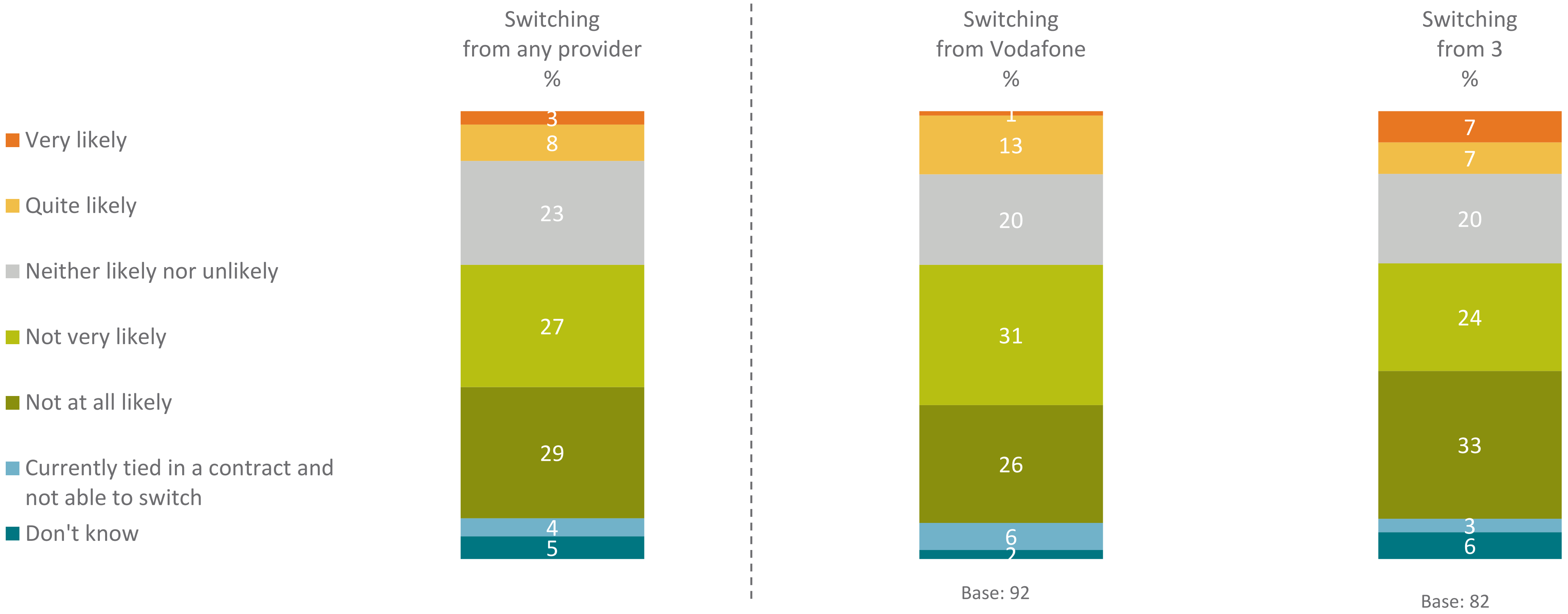
		Age				Region		
	Total	18-34	35-54	55-64	65+	Urban	Semi-Rural	Rural
	%	% (112)	% (168)	% (44)*	% (34)*	% (136)	% (99)	% (123)
Satisfied	76	77	73	81	86	77	80	69

* Caution, base size < 50.

Q.65a Out of 10, where 1 is very dissatisfied and 10 is very satisfied, how satisfied are you with your mobile broadband supplier?
Base: 358

Roughly 1 in 10 say that they are likely to switch mobile broadband provider in the next 12 months.

Mobile Broadband - Likelihood to Switch Provider in the Next 12 Months



*Other Providers not shown due to small base sizes (<50).

Q.78 How likely are you to consider switching mobile broadband service supplier within the next 12 months?
Base: 268 (non-bundled)

TV Usage

Half of households in rural areas are using Saorview, compared with a quarter in urban areas. Over two out of every five households say they use Netflix.

TV - Services

	Total	Age				Region			Bundle	
	Total	18-34	35-54	54-65	65+	Urban	Semi- Rural	Rural	Bundle	Non-Bundle
	%	% (256)	% (494)	% (182)	% (226)	% (385)	% (384)	% (389)	% (608)	% (530)
Sky TV	52	60	53	51	40	49	57	55	53	51
Netflix	42	56	53	31	11	47	32	37	53	28
Saorview	33	26	31	36	43	25	46	50	26	41
Catch Up Players	30	32	38	21	11	28	33	32	38	19
Virgin Media	20	19	23	13	18	30	1	2	28	8
Sky Go	15	24	15	14	6	14	17	14	18	11
NowTV	11	16	11	15	6	12	11	8	12	11
Freesat	9	9	11	8	5	7	13	10	8	11
Access TV through Internet	9	12	11	5	9	9	10	6	13	4
Saorsat	8	9	7	7	8	7	7	10	7	7
Eircom/eVision	7	6	7	7	5	7	8	3	10	2
Amazon Prime	5	6	7	1	-	6	2	9	6	2
Chromecast TV	5	8	8	-	2	6	4	4	8	2
Apple TV	4	4	6	4	1	5	3	3	6	3
Amazon Fire	3	4	3	-	2	3	*	4	4	1
Do not have TV	4	2	4	5	3	4	3	4	3	5
Average no. of Services	**3.5**	**3.9**	**3.9**	**3.1**	**2.6**	**3.6**	**3.5**	**3.5**	**3.9**	**3.0**

Q.9a Do you or your household have any of the following TV services?
Base: 1,158

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95% of those with streaming services say they still watch live TV services, with 44% saying that the amount of live TV they view is unchanged.

Impact of Online Streaming Services on Live/ Scheduled TV

	Total	2015	Age: 18-34	35-54	54-65	65+	Region: Urban	Semi-Rural	Rural
	%	%	% (175)	% (328)	% (68)	% (44)*	% (228)	% (197)	% (190)
I stopped watching live/ scheduled TV	5	14	12	3	1	-	6	4	1
I still watch live/ scheduled TV, but amount of time spent doing so has decreased	51	43	49	55	50	34	52	45	57
I still spend the same amount of time watching live/ scheduled TV	44	43	39	43	49	66	42	51	42

* Caution, base size < 50.

Q.11 Has the usage of online TV streaming services, such as Netflix or Amazon Prime impacted the amount of time spent watching live/ scheduled/ traditional TV over the last year?

Base: 615

New and Old Technologies

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Usage of traditional forms of communication remain high, with 45% saying that they have used a home phone in the past 6 months and three-quarters having sent a letter or postcard.

Service Use in the Last 6 Months

		Age				Region		
	Total	18-34	35-54	54-65	65+	Urban	Semi-Rural	Rural
	%	% (356)	% (606)	% (235)	% (322)	% (504)	% (511)	% (504)
Public Phone Box	3	4	3	6	2	4	2	2
Home Phone	45	27	43	51	69	45	47	42
Directory Enquiries	19	8	15	28	34	18	19	26
Printed Telephone Book	17	7	14	27	31	15	21	22
Teletext	13	11	13	16	12	12	16	14
Sent Letter/ Postcard	77	64	79	82	82	78	76	70
Received Letter/ Postcard	86	77	87	92	90	86	88	80
Sent/ Received Fax	15	16	19	12	6	16	12	15
Made/ received videocall	42	60	51	28	13	45	37	40

Q.90 In the last six months, have you personally used any of the following products, services or technologies in Ireland?
Base: 1,519

Almost 3 out of 10 households have a Smart TV with usage of other smart devices limited to fewer than 1 in 10 households.

Products, Services & Technologies: Current Use

	Total	Age				Region			Dependent Children	
	Total	18-34	35-54	54-65	65+	Urban	Semi-Rural	Rural	Yes	No
	%	% (356)	% (606)	% (235)	% (322)	% (504)	% (511)	% (504)	% (779)	% (740)
Tablet/ iPad	65	79	77	55	31	68	60	62	50	82
Smart TV	29	33	38	24	8	30	27	27	18	41
TV Streaming Box	13	15	18	10	3	14	12	9	6	21
Apple/ Android Pay	7	11	8	5	*	7	6	5	4	10
Smart Watch/ Wearable Fitness Tracker	9	11	11	9	3	8	11	11	7	12
Smart Home Thermostat	4	4	4	7	1	4	4	6	3	5
Other Smart Home Devices	3	4	3	4	-	3	2	5	1	4
Petrol/ Diesel based Car	84	78	89	87	78	80	89	91	78	90
Hybrid Car	4	3	5	6	3	5	2	4	3	6
Fully Electric Car	1	*	1	-	1	1	1	1	1	1

Q.91a Do you or a member of your household (living in this house) currently use any of the following products, services or technologies in your day to day life or at home?

Base: 1,519

The majority expect to have a Smart TV in five years time, with projected increases in usage of other smart home devices.

Products, Services & Technologies: Anticipated Future Use (5 years)

	Total	Age: 18-34	Age: 35-54	Age: 54-65	Age: 65+	Region: Urban	Region: Semi-Rural	Region: Rural	Dependent Children: Yes	Dependent Children: No
	%	% (356)	% (606)	% (235)	% (322)	% (504)	% (511)	% (504)	% (779)	% (740)
Tablet/ iPad	74	88	85	61	40	76	69	69	60	89
Smart TV	56	68	67	44	24	56	54	56	41	72
TV Streaming Box	34	42	45	21	11	34	37	27	23	46
Apple/ Android Pay	26	35	32	20	7	25	30	19	18	34
Smart Watch/ Wearable Fitness Tracker	25	35	30	16	7	24	27	26	18	33
Smart Home Thermostat	32	33	43	25	12	32	33	31	21	44
Other Smart Home Devices	25	29	34	16	7	23	27	27	16	34
Petrol/ Diesel based Car	72	72	76	70	65	66	82	82	65	80
Hybrid Car	26	25	32	21	17	26	23	31	20	32
Fully Electric Car	14	16	15	14	8	16	9	10	13	14
Autonomous/ Self-Driving Car	4	5	4	3	2	4	3	4	2	5

Q.91b Do you see you or your household owning or using any of the following products, services or technologies in your day to day life or at home in **five years** time?

Base: 1,519

Across most technologies measured, anticipated future use in five years time is considerably higher than current usage levels.

Products, Services & Technologies

	Current Use	Anticipated Future Use (5 years)
	%	%
Petrol/ Diesel based Car	84	72
Tablet/ iPad	65	74
Smart TV	29	56
TV Streaming Box	13	34
Smart Watch/ Wearable Fitness Tracker	9	25
Apple/ Android Pay	7	26
Smart Home Thermostat	4	32
Hybrid Car	4	26
Other Smart Home Devices	3	25
Fully Electric Car	1	14
Autonomous/ Self-Driving Car	N/A	4

Q.91a Do you or a member of your household (living in this house) currently use any of the following products, services or technologies in your day to day life or at home?
Base: 1,519

Q.91b Do you see you or your household owning or using any of the following products, services or technologies in your day to day life or at home in <u>five years</u> time?
Base: 1,519

Bill Shock

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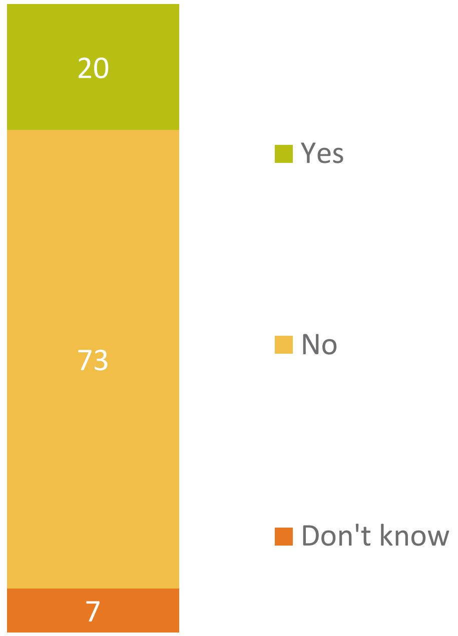
1 in 5 householders say that they have experienced bill shock at some stage, with almost half of these indicating that their most recent experience related to their mobile phone.

Bill Shock - Services

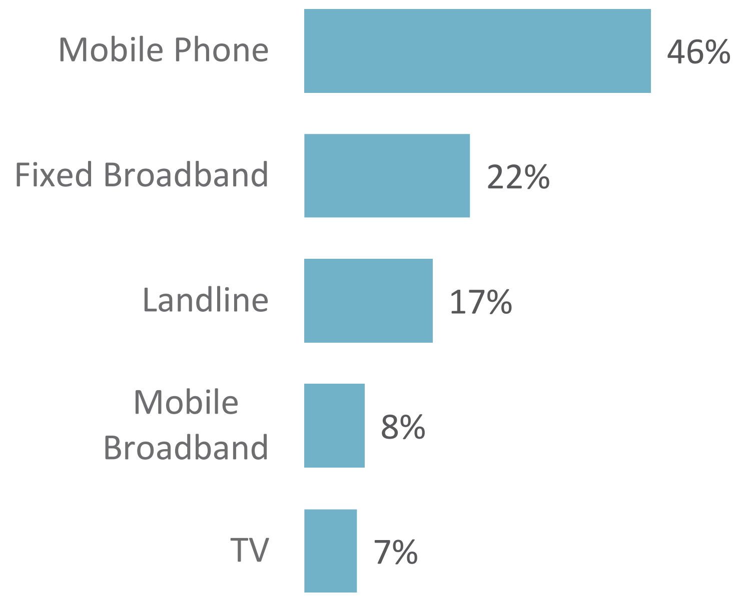
Experienced Bill Shock
%



Age

18-34	35-54	54-65	65+
% (355)	% (606)	% (234)	% (322)
22	23	17	14
70	70	75	81
7	7	7	5

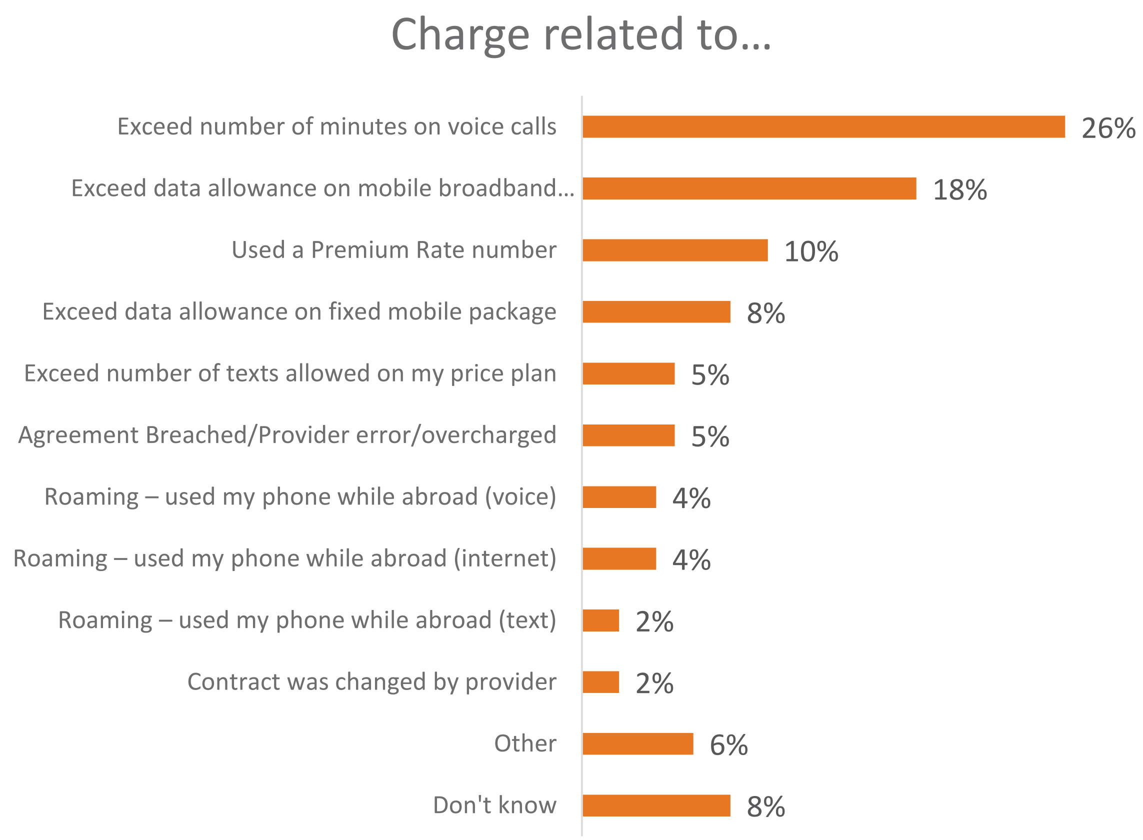
Service Bill Shock Related To

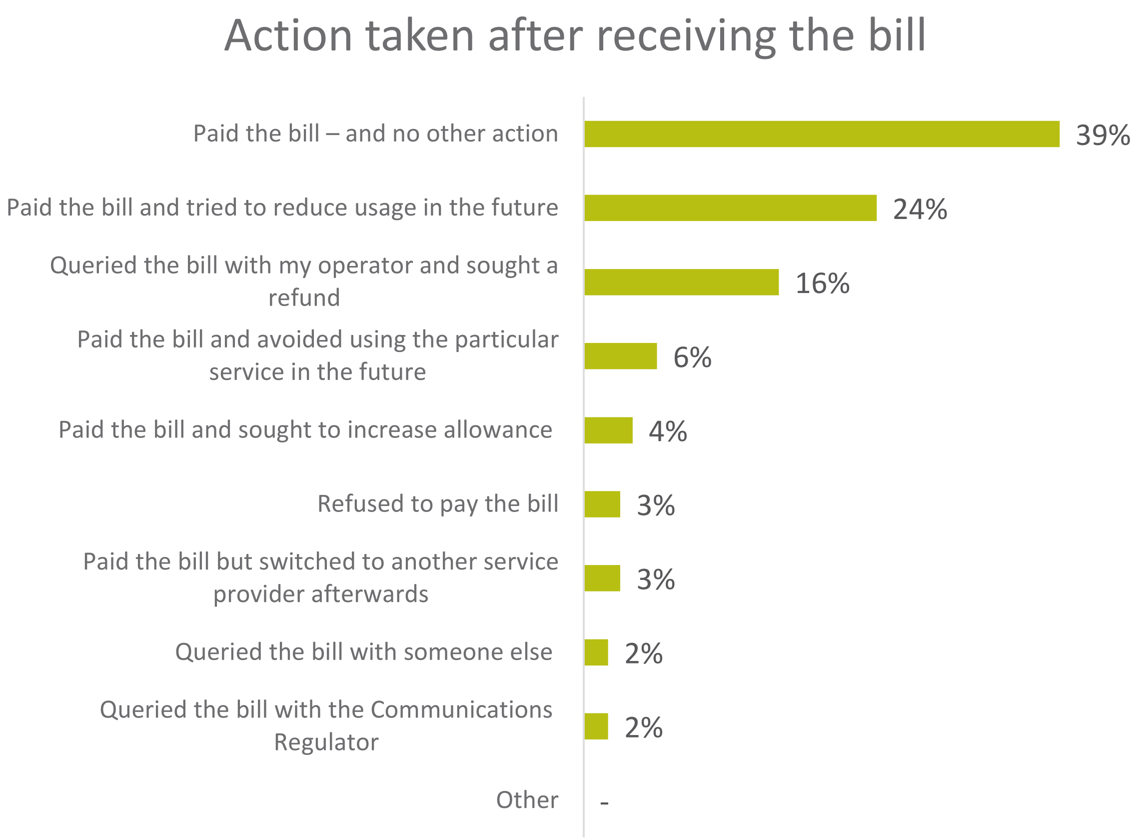


Q.83 Thinking about your current services, have you ever received a bill or paid more for a service than you expected?
Base: 1,517
Q.84 Thinking about the last time this happened to you, which service did it relate to?
Base: 285

Bill shock typically related to exceeding allowances on phone/broadband packages. 2 out of 5 experiencing bill shock say they paid the bill and took no further action.

Bill Shock





Q.85a The last time this happened, what did the extra charge relate to?
Base: 285
Q.85b What actions did you take after receiving the bill or being charged more than you expected? Again referring to the last time this happened to you.
Base: 285

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