



Comreg Study (August 2016)



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Comreg Study

EXECUTIVE SUMMARY



KEY POINTS

Phone service

99% of the respondents have a phone service, of which the majority has a Mobile phone (95%) and more than half have a traditional corded telephone (55%). Little over a quarter of the respondents include VoIP as a phone service (27%).

Phone service provider

7 in 10 respondents have a home telephone. Eir, Virgin Media Ireland, Vodafone and Sky are the most used internet service cumulating to a percentage of 67%, with respondents using Eir mostly (25%).

Type of home phone service

Cordless telephone is the preferred type of home telephone (79%). If a cordless telephone wouldn't work for any reason, 75% would not plug a corded telephone directly in the wall.

VoIP Services

25% of VoIP users are unaware that a VoIP service might not work if there was an electricity failure. 63% of VoIP users were aware that they may need to have a battery back-up to use VoIP services. 56% of VoIP users would not be prepared to buy a battery back-up for VoIP voice services those that would, would likely not pay more than 25,- (31%).



The vast majority of the respondents (95%) have a mobile phone service. The cohort 55+ (83%) and C/U (61%) showed a high ownership of the traditional corded telephone. Male respondents (32%) and Dublin (34%) respondents are more likely to have a VoIP service over the internet.

Home Phone Services

		Male	Female	18-34	35-54	55+	Dublin	RoL	Munster	C/U
95%		94%	97%	95%	95%	98%	94%	94%	96%	100%
55%		53%	57%	43%	54%	83%	55%	55%	52%	61%
27%		32%	22%	27%	25%	31%	34%	23%	22%	26%
	None of these	1%	0%	2%	0%	0%	0%	3%	0%	0%
1%		0%	0%	1%	0%	0%	1%	0%	0%	0%
	Don't know	0%	0%	1%	0%	0%	1%	0%	0%	0%



Eir is a telephone service mostly used by the cohort 55+ (38%), Virgin Media has the most users in the Dublin area (37%), while Vodafone would find mostly users in C/U (23%). Lastly Sky would be most popular in the RoL area (16%). The cohort who doesn't have a home telephone would be most likely the 18-34 years of age (39%).

Telephone Service Provider



	Male	Female	18-34	35-54	55+	Dublin	RoL	Munster	C/U
Eir	28%	22%	21%	23%	38%	20%	24%	32%	24%
Virgin Media Ireland	19%	17%	17%	17%	22%	37%	9%	6%	8%
Vodafone	12%	12%	13%	10%	16%	5%	15%	13%	23%
Sky	8%	13%	8%	12%	8%	9%	16%	10%	9%
Imagine	1%	1%	0%	2%	0%	0%	3%	0%	1%
Digiweb	1%	0%	0%	1%	1%	1%	0%	1%	0%
Pure Telecom	0%	1%	0%	1%	3%	0%	0%	2%	1%
Magnet	0%	0%	0%	1%	0%	1%	0%	0%	0%
Don't know	1%	3%	2%	2%	2%	2%	0%	2%	2%
Don't have a home telephone	30%	31%	39%	31%	10%	25%	33%	34%	32%

Q: Who is your home telephone service provider? (Single select, n = 1013)



Of all users of landline telephone services, 8 in 10 (79%) use cordless telephone devices. Corded telephones are less popular with only 1 in 5 (21%) using them at home.

Home Telephone Devices

79%



21%



A cordless telephone

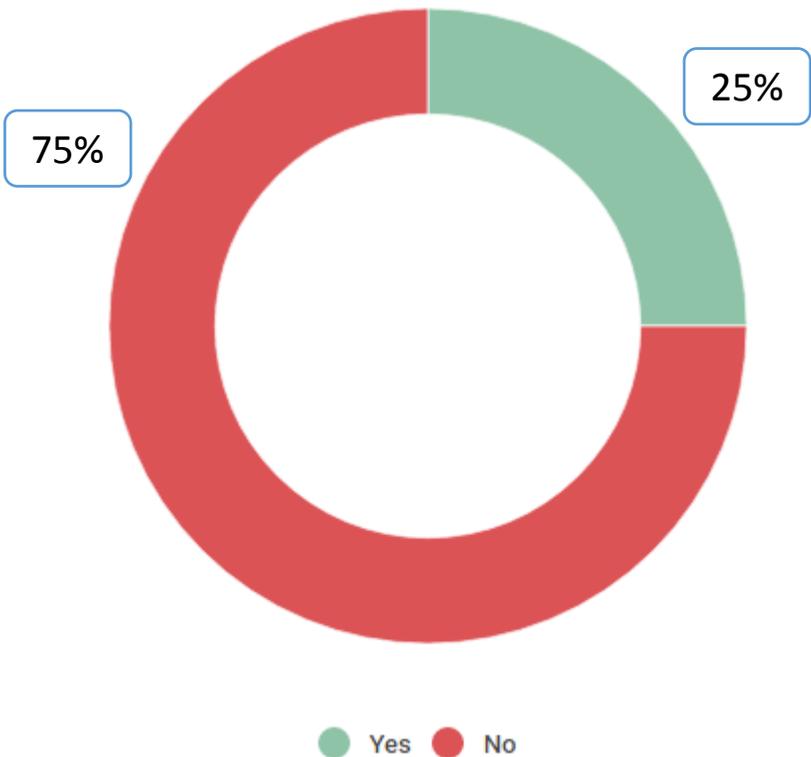
A corded telephone

Male	Female	18-34	35-54	55+	Dublin	RoL	Munster	C/U
77%	81%	77%	77%	83%	80%	82%	72%	85%
23%	19%	23%	23%	17%	20%	18%	28%	15%



If a cordless telephone wouldn't work for any reason, **75%** would not plug a corded telephone directly in the wall.

Not working cordless telephone



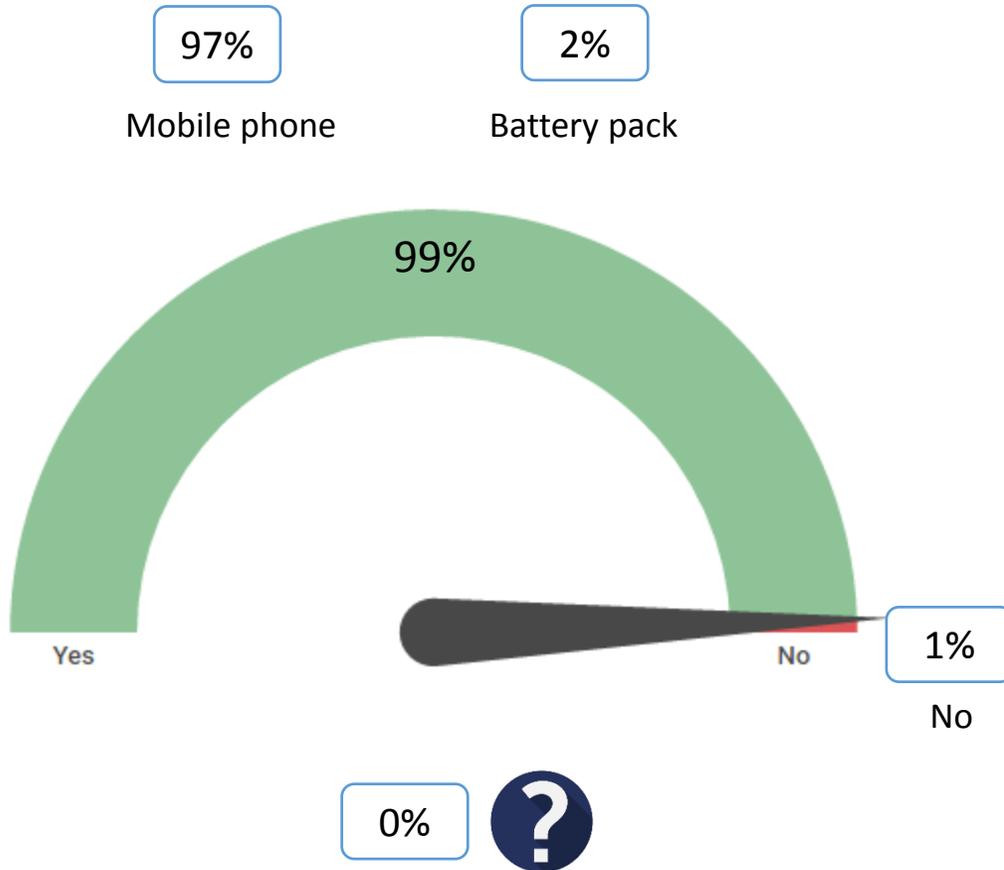
	Male	Female	18-34	35-54	55+	Dublin	RoL	Munster	C/U
Yes	28%	23%	23%	25%	29%	21%	25%	31%	28%
No	72%	77%	77%	75%	71%	79%	75%	69%	72%

Q: If your home cordless telephone isn't working (e.g. if there is an electricity failure) do you plug a corded telephone directly into the wall? (Single select, n =555)

99% of the respondents would have a back-up service to make an emergency call. The cohort in Connacht/Ulster showed the highest percentage of using a battery pack to make an emergency call (5%), which gives them the relatively lowest share for mobile phone use in case of emergencies (94%).



Emergency call

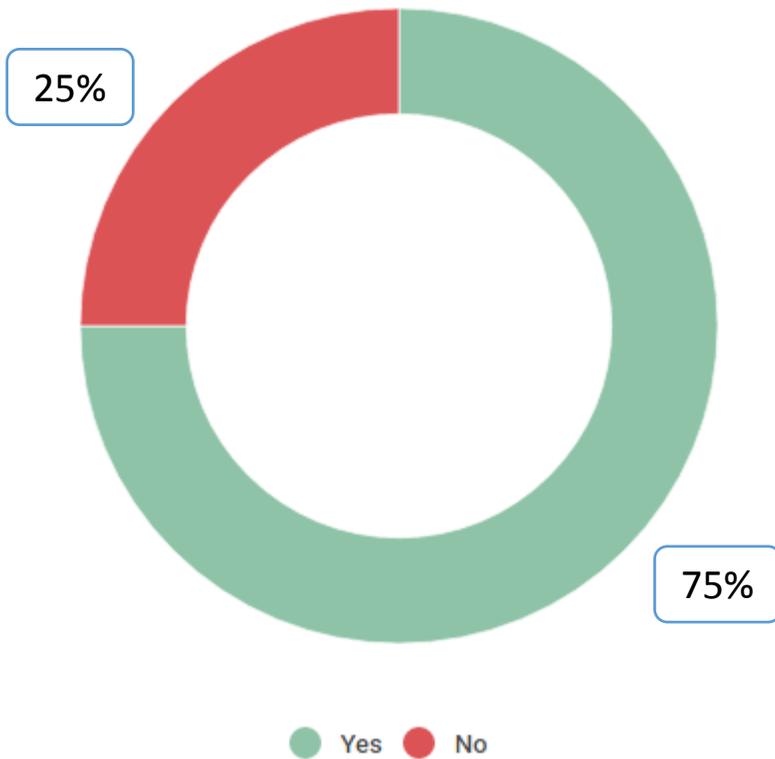


	Male	Female	18-34	35-54	55+	Dublin	RoL	Munster	C/U
Mobile phone	97%	97%	95%	97%	99%	99%	99%	96%	94%
Battery pack	2%	2%	4%	2%	0%	0%	1%	2%	5%
No	1%	0%	0%	1%	1%	1%	0%	1%	1%
Don't know	0%	1%	1%	0%	0%	0%	0%	1%	0%



25% of the respondents are unaware that a VoIP service might not work if there would be an electricity failure. With Dublin participant having the lowest awareness score (31%).

VoIP awareness

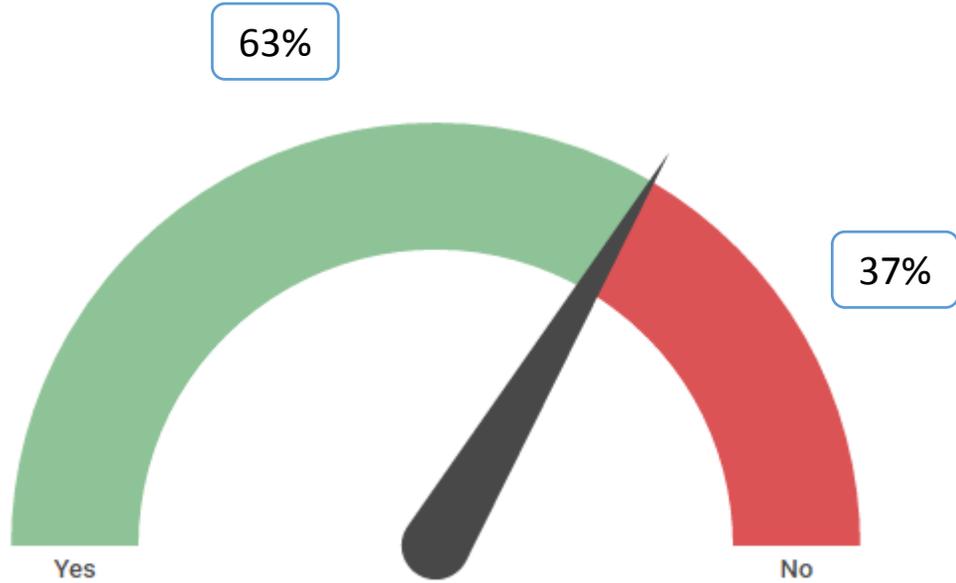


	Male	Female	18-34	35-54	55+	Dublin	RoL	Munster	C/U
Yes	80%	67%	69%	76%	81%	69%	78%	77%	84%
No	20%	33%	31%	24%	19%	31%	22%	23%	16%



Just over 6 in 10 (**63%**) of VoIP users are aware that they may need to have a battery back-up to be able to use their VoIP service in the event of electricity failure (lowest awareness levels seen amongst females – **50%**, 18-34 cohorts - **58%** and in Dublin - **51%**).

Battery back-up awareness

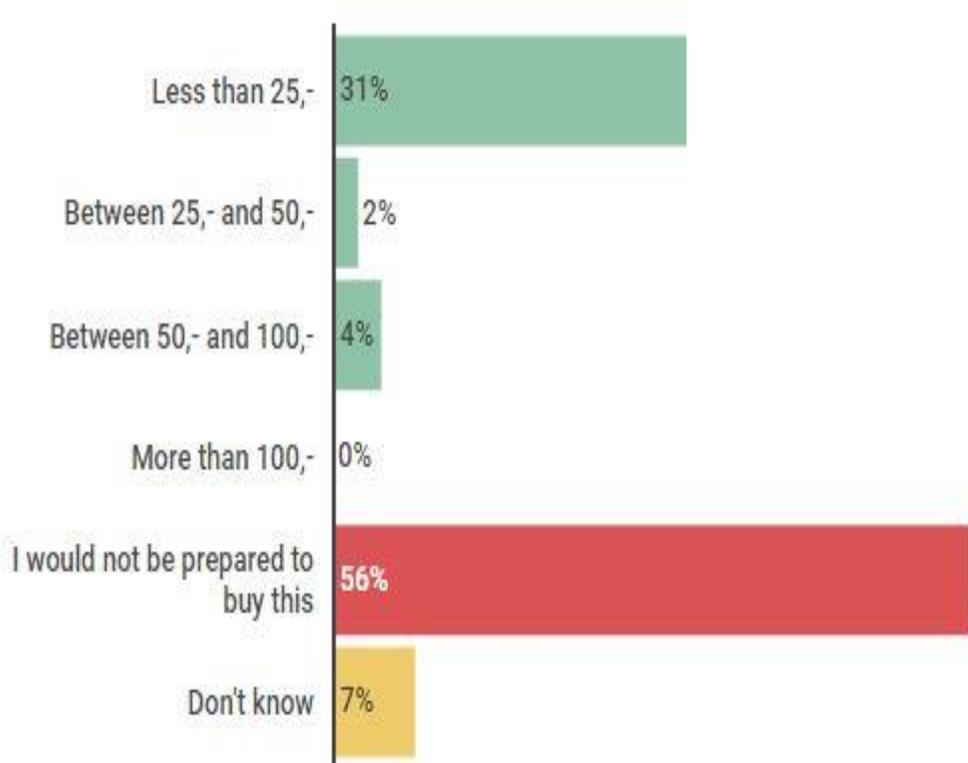


	Male	Female	18-34	35-54	55+	Dublin	RoL	Munster	C/U
Yes	73%	50%	58%	64%	70%	51%	77%	63%	84%
No	27%	50%	42%	36%	30%	49%	23%	37%	16%



Nearly 4 in 10 users of VoIP services (37%) are prepared to spend each year for a battery pack for the service (31% less than €25). 18-34 (54%) and C/U (54%) are most prepared to pay. The cohort 55+ is most resilient (67%).

Battery back-up spend for VoIP



Male	Female	18-34	35-54	55+	Dublin	RoL	Munster	C/U
36%	23%	44%	23%	24%	27%	27%	26%	54%
1%	4%	4%	1%	2%	2%	4%	2%	0%
5%	2%	6%	3%	2%	5%	0%	7%	0%
0%	0%	0%	0%	0%	0%	0%	0%	0%
51%	61%	40%	63%	67%	58%	63%	56%	40%
7%	8%	6%	10%	5%	8%	6%	9%	6%

Q: How much would you be prepared to spend each year if you had to buy a battery back-up for your VoIP voice service (phone over the internet (VoIP))? (Single Select, n = 272)



Comreg Study

Study conducted as part of the iReach Consumer Omnibus Survey



Consumer Research Project

Conducted by iReach Market Research on behalf of
Commission for Communication Regulation

Online Survey

Fieldwork undertaken in 11th – 19th August 2016



Qualtrics Survey Software

iReach utilises leading market research solution for all aspects of survey project management: sampling, design, data collection and tabulation

Consumer Panel

Consumer Research Study conducted nationwide
Sample Size = 1,013 Respondents



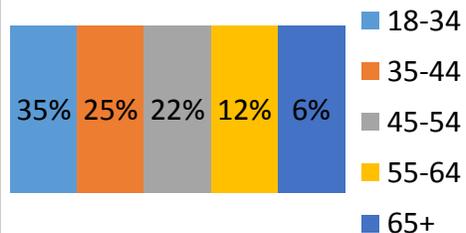
iReach Online Consumer Panel

iReach uses proprietary panel across consumer groups, built on a nationally representative model

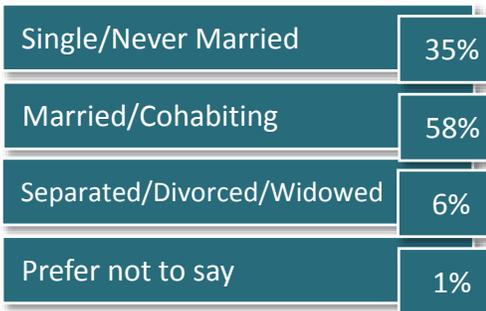
Gender



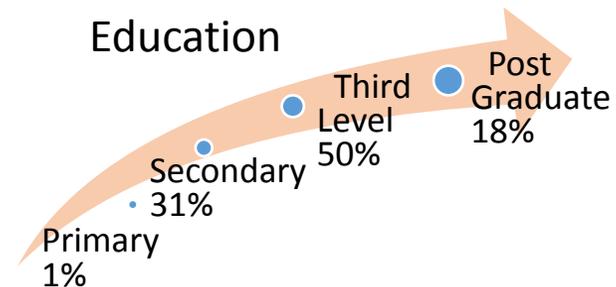
Age of respondents



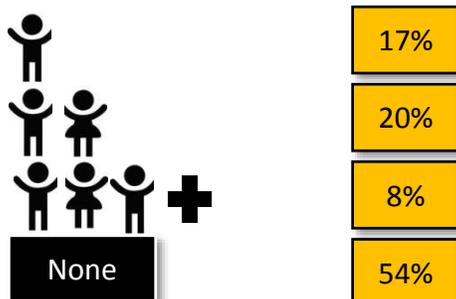
Marital Status



Education



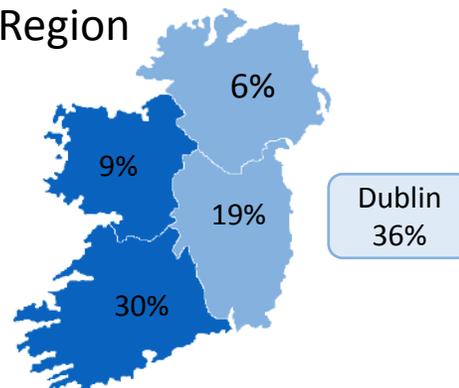
Children at Home



Household Income

< €30 000	23%
€30K - €49,999	22%
€50K - €100K	29%
€100K+	5%
Prefer not to say/ Don't know	21%

Region



Occupation

High managerial, admin, professional	2%
Intermediate managerial, admin, professional	17%
Supervisor, Jr managerial, admin, professional	31%
Manual worker (skilled, non-skilled)	15%
Farmer/ Agricultural Worker	1%
Homemaker	8%
Unemployed	7%
Student	8%
Retired (on state, private pension)	7%
Self employed	4%



Commission for
Communications Regulation

THANK YOU.

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