ComReg Consumer ICT Survey

April 2013

Commission for Communications Regulation

Job No: 54212

Background & Objectives

- ComReg wish to conduct a consumer ICT Survey in order to establish access to and satisfaction with household telecommunications.
- The specific objectives of the research are to access :

  - Ownership, Provider, Satisfaction, Switching within 4 key markets

Landline

Mobile Phone

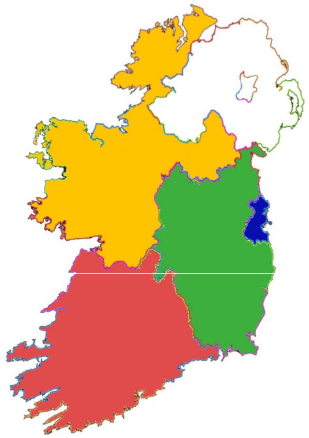
Mobile Broadband

Fixed Broadband

+ TV

Methodology

- 1,000 interviews were conducted by phone between 12th-27th February among a nationally representative sample of telecoms decision makers.
- A boost sample of 500 interviews was conducted in Urban areas of Dublin, Cork, Limerick & Galway – all city data shown on merged sample of 904.
- A modular system was adopted to ensure any respondent would not answer any more than 3 service sections. Alternative selection of mobile and fixed broadband



Note on Methodology

- The survey is representative of those already holding telecommunications services.
- Mobile Only households were weighted to 30% of the sample

Presentation Structure

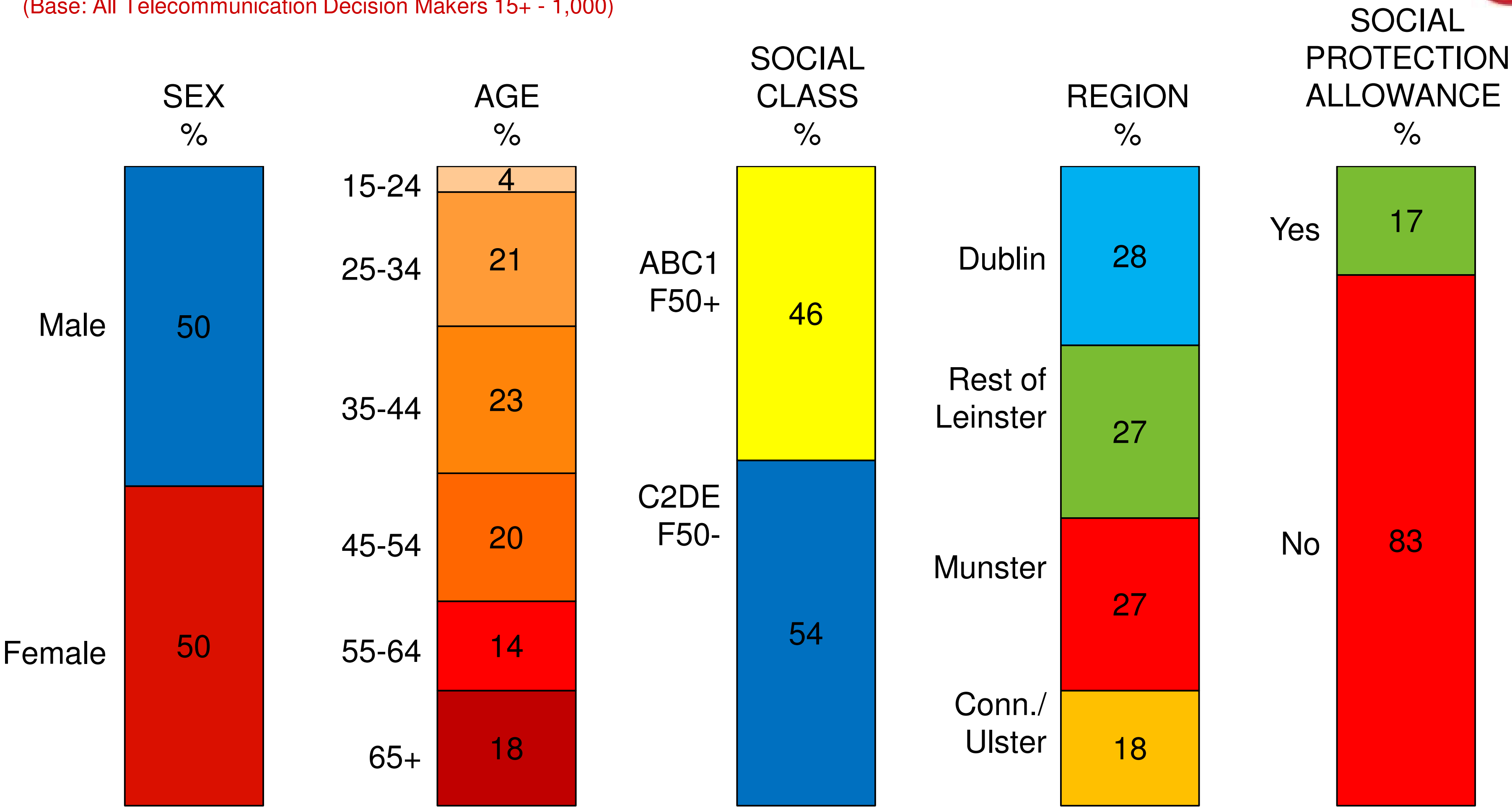
1. Sample Profile
2. Service Ownership
3. Landline
4. Mobile Phone
5. Mobile Broadband
6. Fixed Broadband
7. Bundles & Spend
8. ComReg Awareness & Complaints

C

Sample Profile

Sample Profile – National Profile Of Telecommunications Decision Makers

(Base: All Telecommunication Decision Makers 15+ - 1,000)

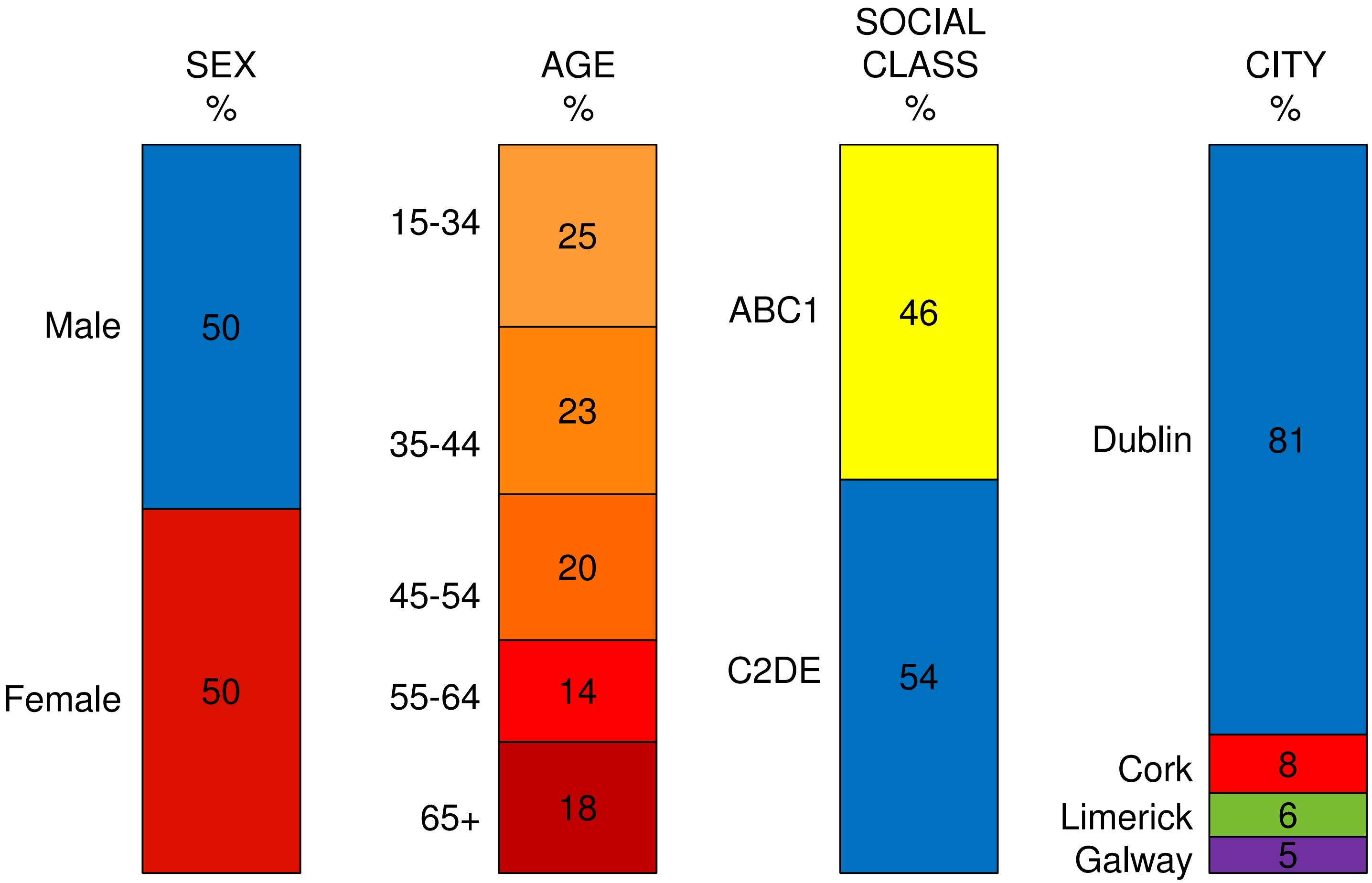


Profile similar to national population profile with the exception of lower share in 15-24 year old's

Quota set based on RED C National Survey – RED Express 2012

Sample Profile – Boost Sample

(Base: All Telecommunication Decision Markers 15+ - 1,000, City 904)



The city sample is weighted by city population size

National Segmentation – Lifestage

(Base: All Telecommunication Decision Maker 15+ - 1,000)

Young & Free

18-34, No kids
No mortgage

→

New Families

Kids, Oldest
0-6 years

↓

Established Families

Oldest kids
6-15 years

↓

Mature Families

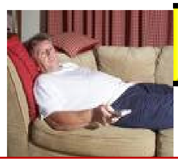
Oldest Child 16+

↓

Mid Age No Kids

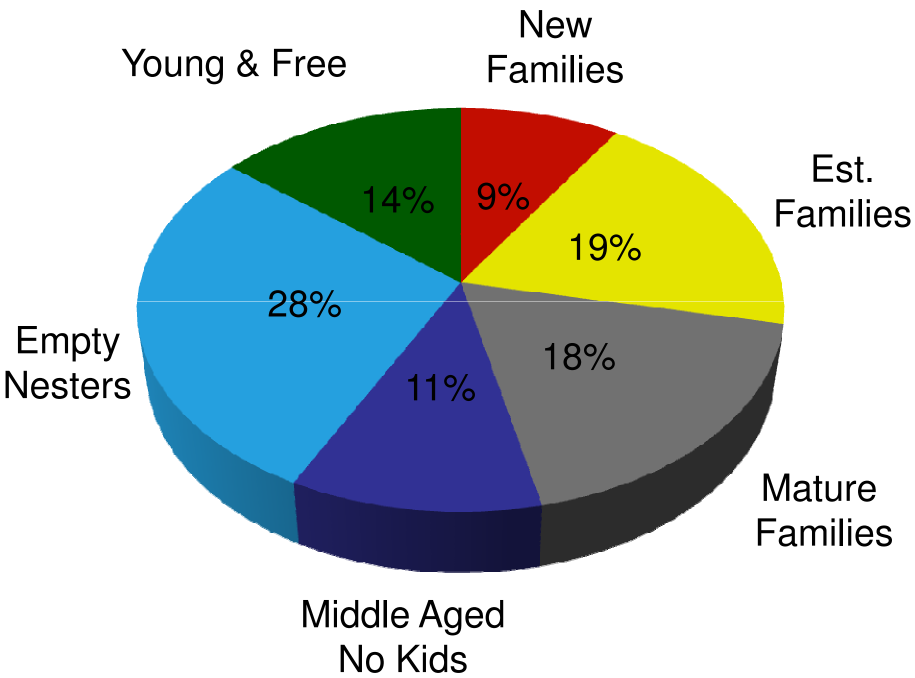
35-54, No Kids

←



Empty Nesters

55+, No Kids

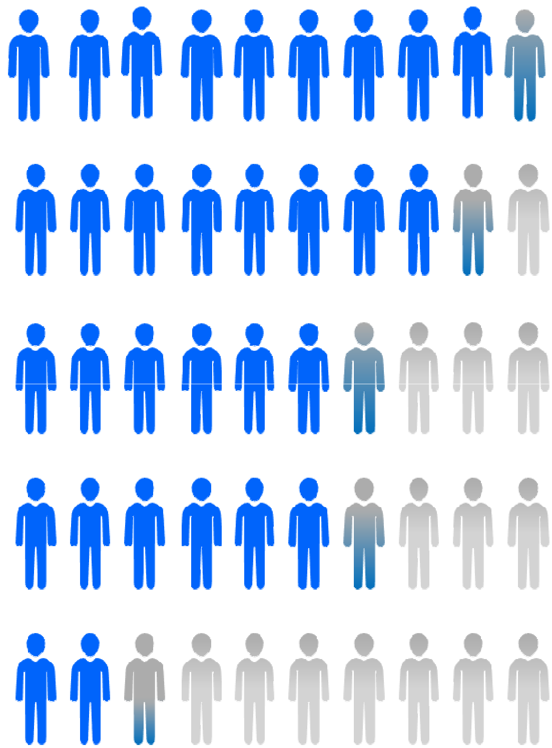


Demographic segmentation profile 6 clusters in the national population that we can analyse our results by

Service Ownership

Telecommunications Services Accessed At Home

(Base: All Telecommunications Decision Makers 15+ - 1,001, City Based - 904)



	National	City Based
Mobile phone	97%	97%
TV – Sky, UPC, Saorview	85%	86%
Home landline	69%	70%
Internet/Broadband (fixed)	66%	73%
Mobile broadband	22%	18%
Any	78%	81%

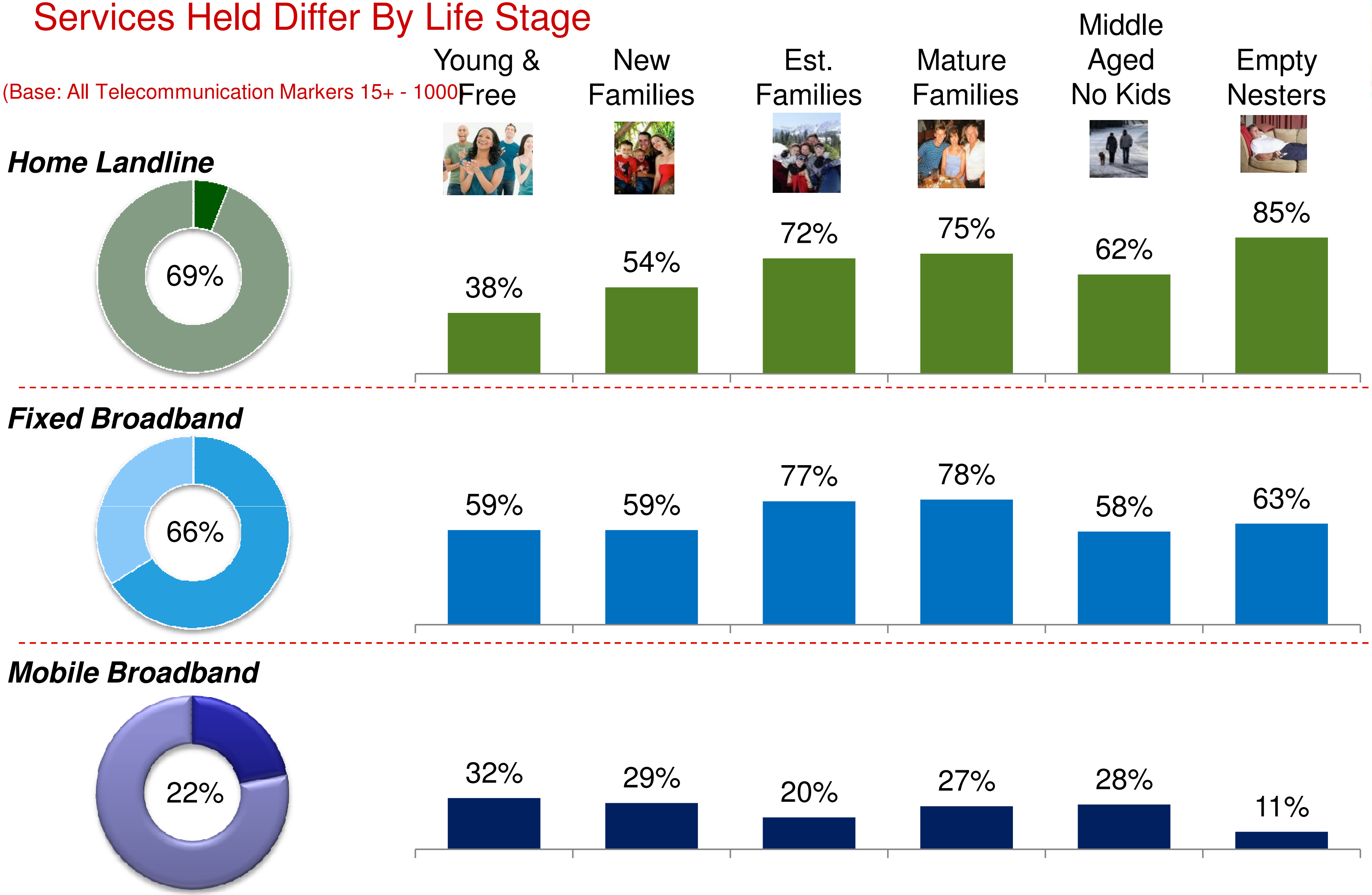
TV in household 94%

2011 Any Broadband 79%

Mobile Phone most common access within household followed by TV then home landline

Services Held Differ By Life Stage

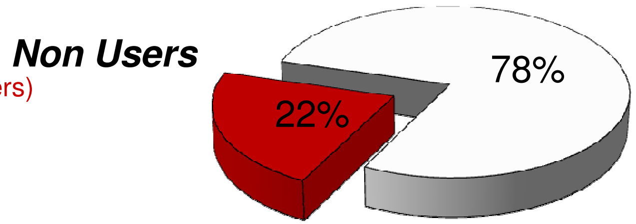
(Base: All Telecommunication Markers 15+ - 1000)

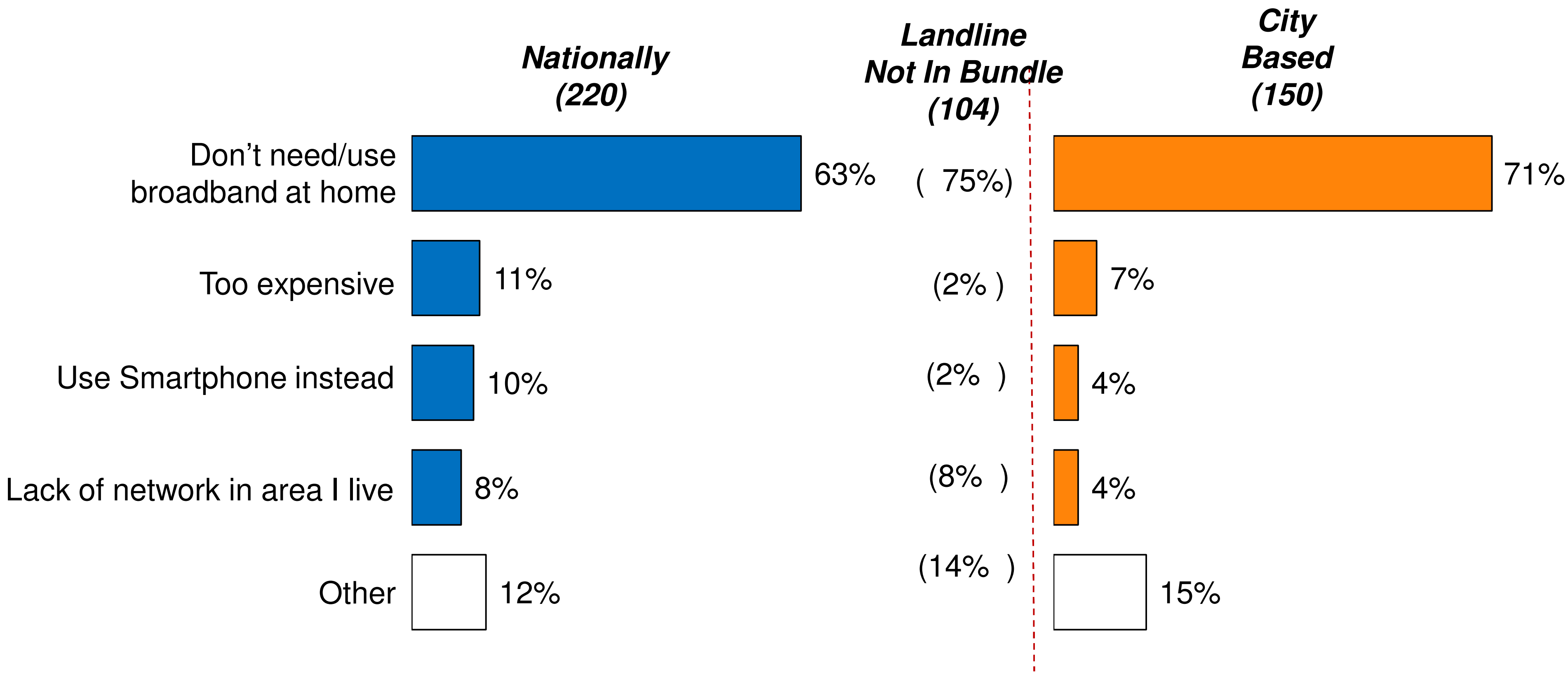


Young and Free least likely to have home landline and most likely to have mobile broadband

Reasons For Not Using Fixed/Mobile Broadband at Home

(Base: All decision makers who are Non Broadband Users)





The main reason for non use of broadband is no need for service

(Q 2)

Lifestage Profile of The Non-Broadband Users

(Base: All Telecommunication Decision Markers 15+ - 1,000)

Empty Nesters 45% (27%)

55+, No Kids

Mid Age No Kids 14% (11%)

35-54, No Kids

Mature Families 9% (18%)

Oldest Child 16+

Established Families 10% (19%)

Oldest kids 6-15 years

New Families 7% (9%)

Kids, Oldest 0-6 years

Young & Free 13% (14%)

18-34, No kids No mortgage

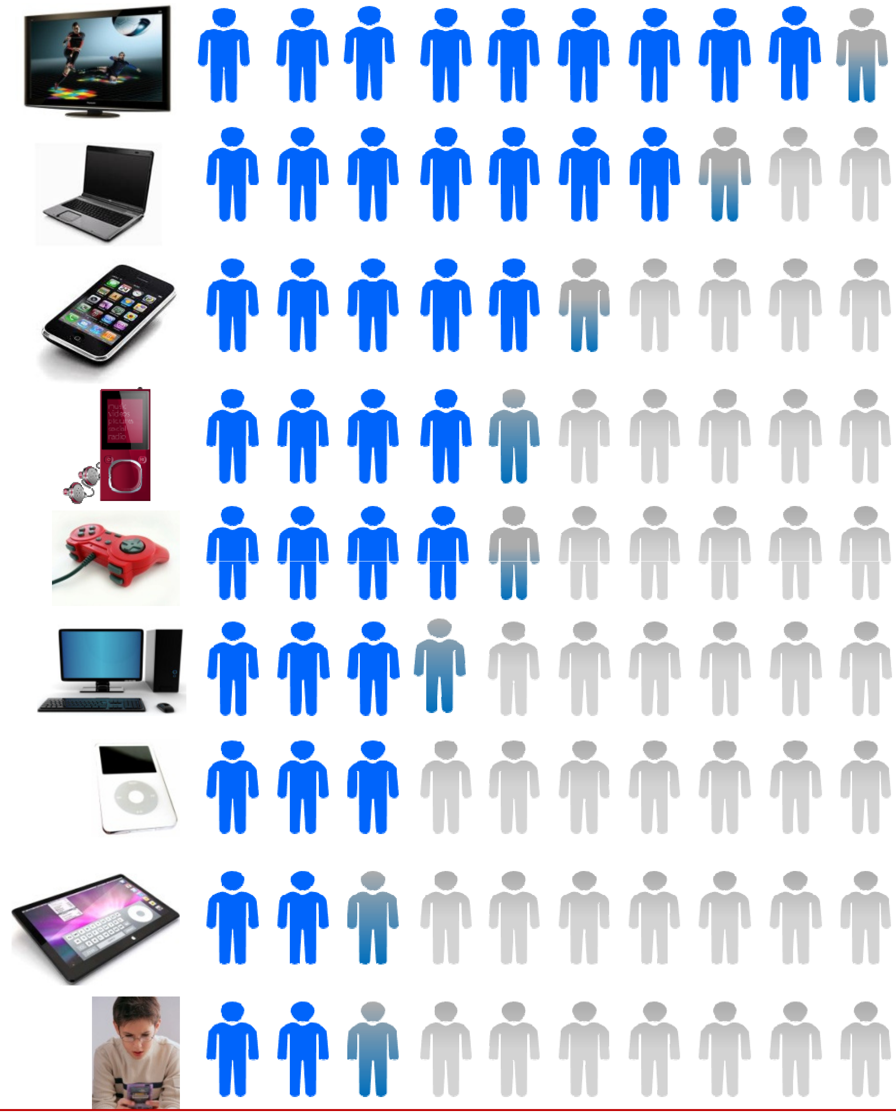
Mid Age onwards have higher numbers of non users than average

Profile of Broadband Non Users over index's from Mid Age no kids onwards

( ) – National Profile

Device Ownership

(Base: All Telecommunications Decision Makers 15+ – 1,000, 904 City Based)



	National	City Based
TV	95%	95%
Laptop	75%	76%
Smartphone	54%	56%
MP3/Digital Music	48%	46%
Games Console	45%	41%
Desktop Computer	38%	32%
Mobile Device (iPod/Netbook)	30%	24%
Tablet (iPad)	29%	30%
Mobile gaming device	28%	24%

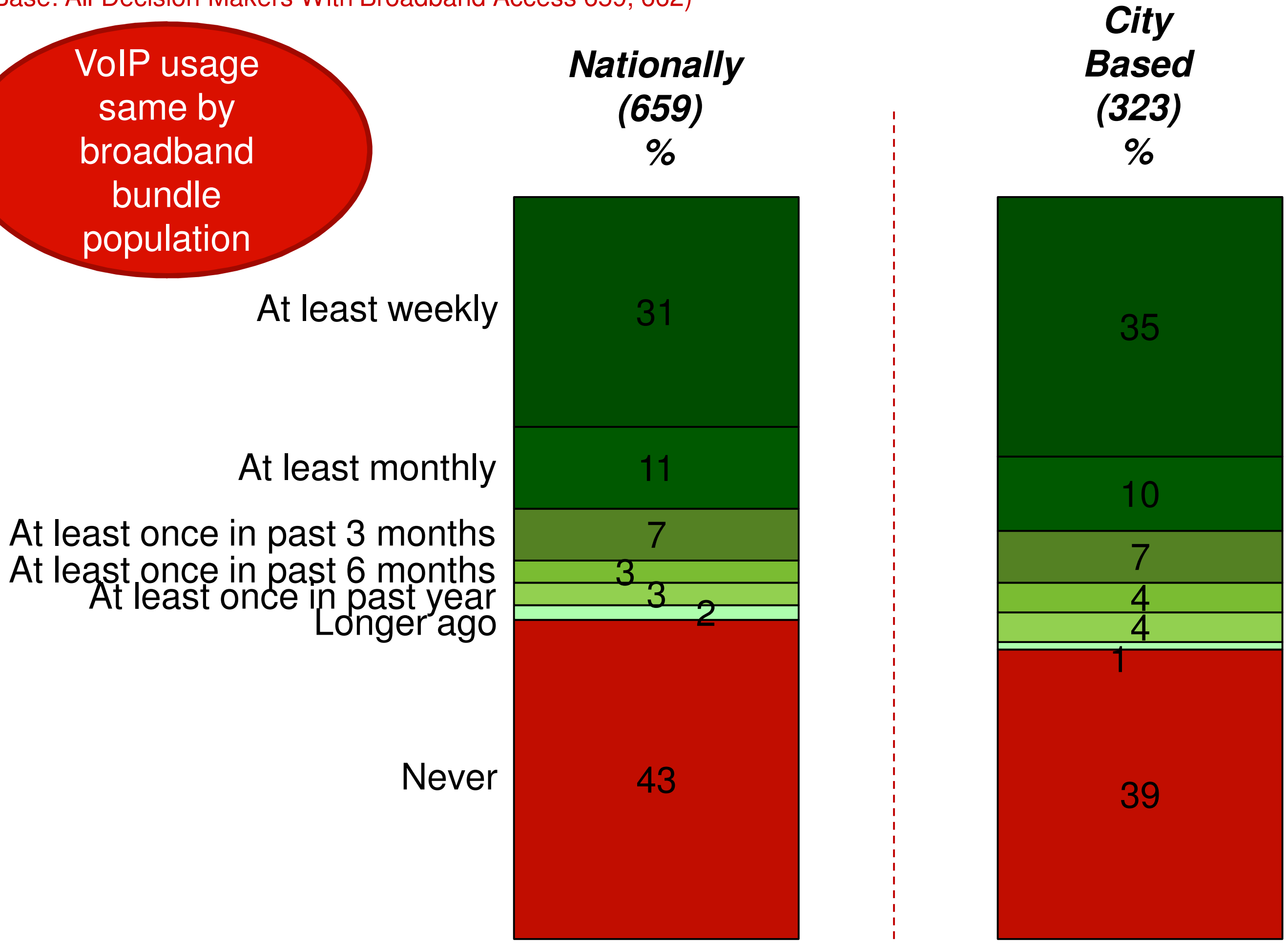
(Q 3)

TV, Laptop & Smartphones most likely held – some devices have lower penetration in the city sample

Frequency Of Using Voice Over Broadband (Skype/Facetime/Viber) To Make Phone Call

(Base: All Decision Makers With Broadband Access 659, 662)

VoIP usage same by broadband bundle population



Young & Free

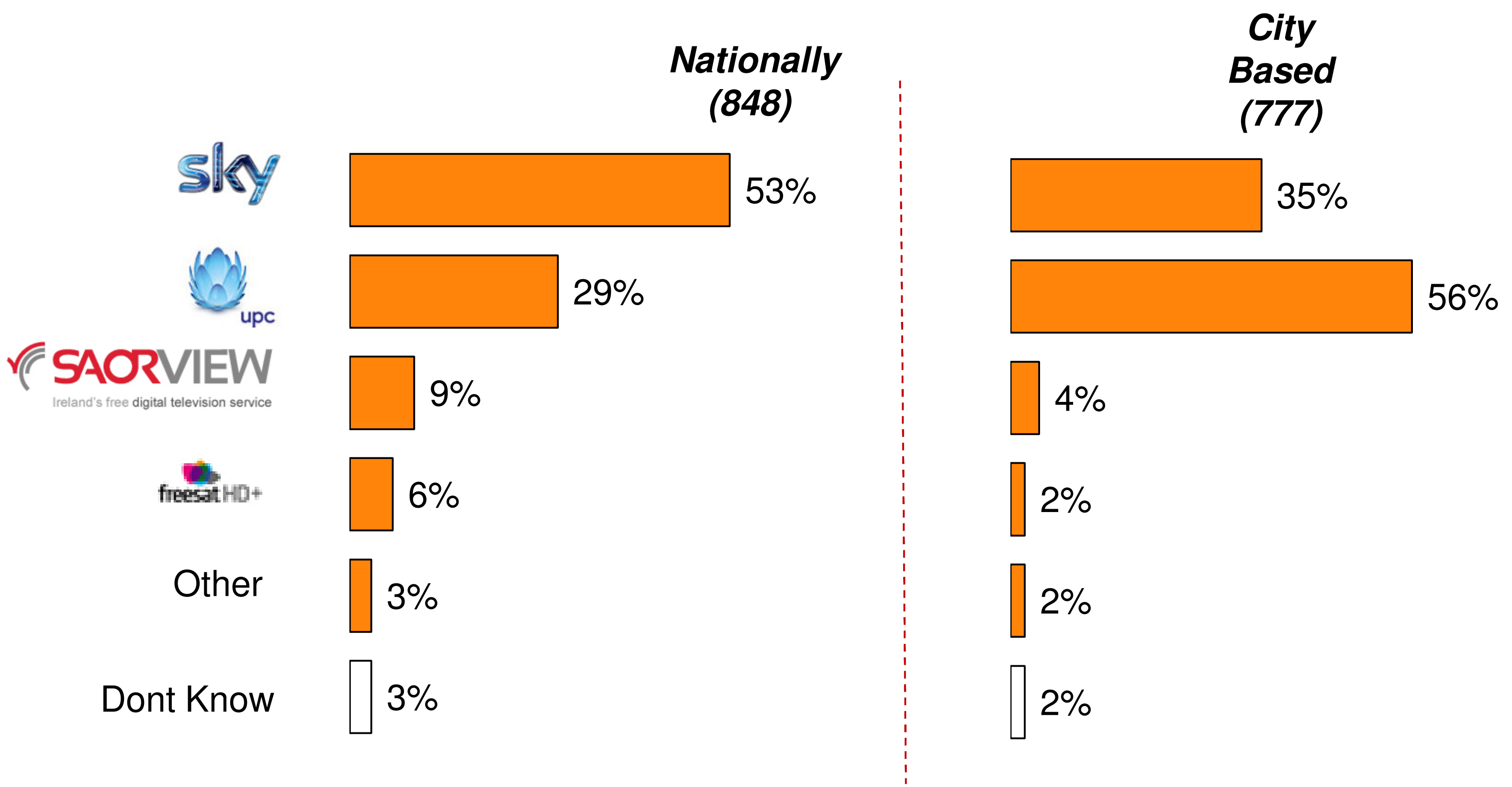
Have significantly higher frequency of usage

1 in 3 of those with broadband access are using Voice over Broadband weekly to make a phone call

(Q 3b)

Companies Currently Use For TV service

(Base: All TV service decision makers – 848, City Based, 777)



Sky share of the national market is over 50% but is lower in city areas

(Q 8)

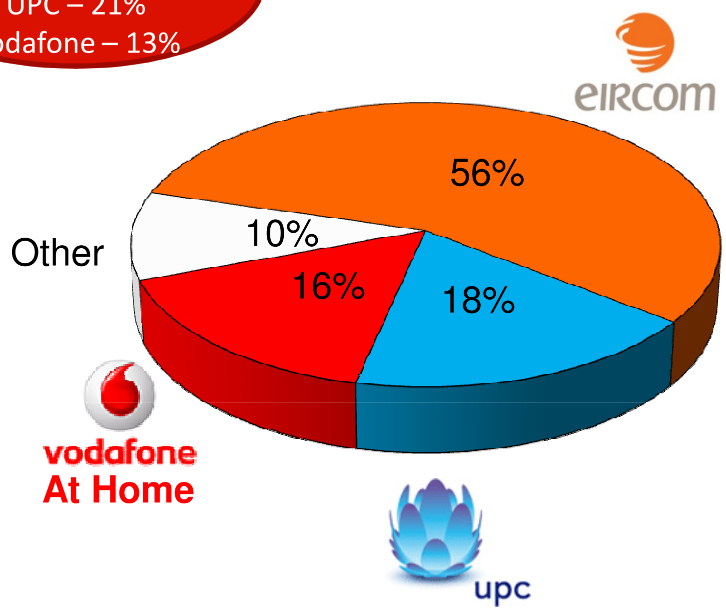

RINGER
1
2
ABC
3
DEF
4
GHI
5
JKL
6
MNO
7
PQRS
8
TUV
9
WXYZ
TONE
OPER
MUTE
PAUSE
FLASH
REDIAL

Landline

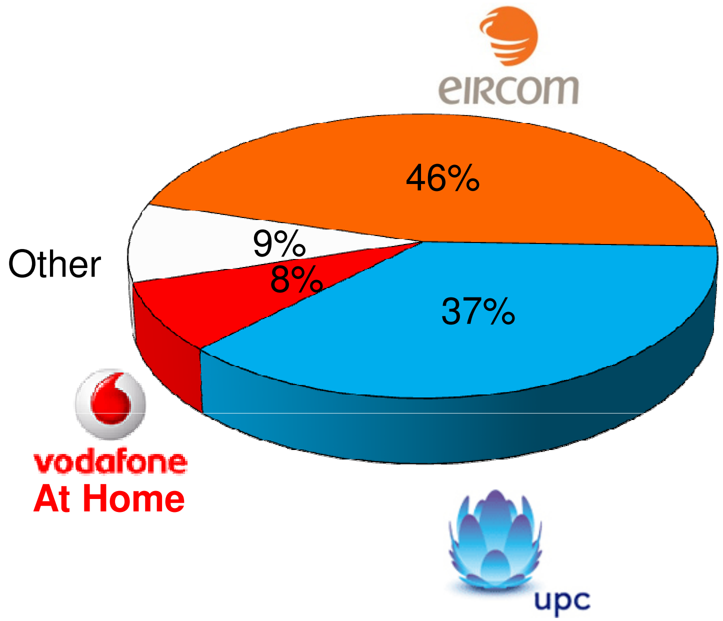
Main Provider Landline

(Base: All Decision Makers with Landline – 692, City Based 633)

2011
Eircom -55%
UPC – 21%
Vodafone – 13%



	Urban	Rural	Landline Non Bundle	Broadband Bundle
Eircom	53	61	63	54
UPC	26	3	4	24
Vodafone	13	23	12	18



	Eircom	UPC	Vodafone
Dublin	44	42	6
Cork	55	14	25
Limerick	52	18	13
Galway	63	20	11

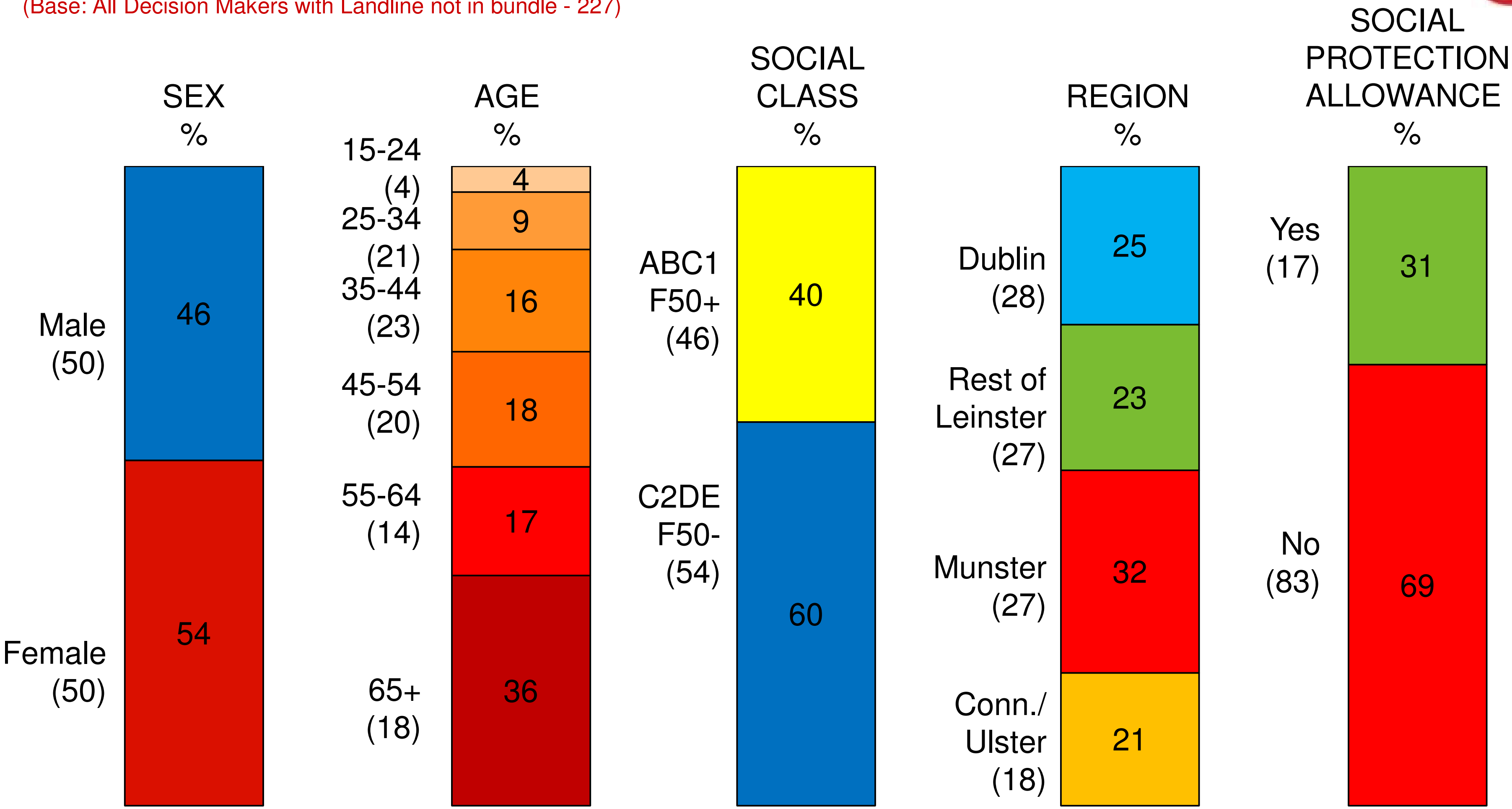
(Q 4a)

Significant difference exist in share by region nationally, and within cities around the country

Other = IFA Telecom, UTV, Pure, Telecom, Rapid Broadband

Demographic Profile of Landline Non Bundle Population

(Base: All Decision Makers with Landline not in bundle - 227)

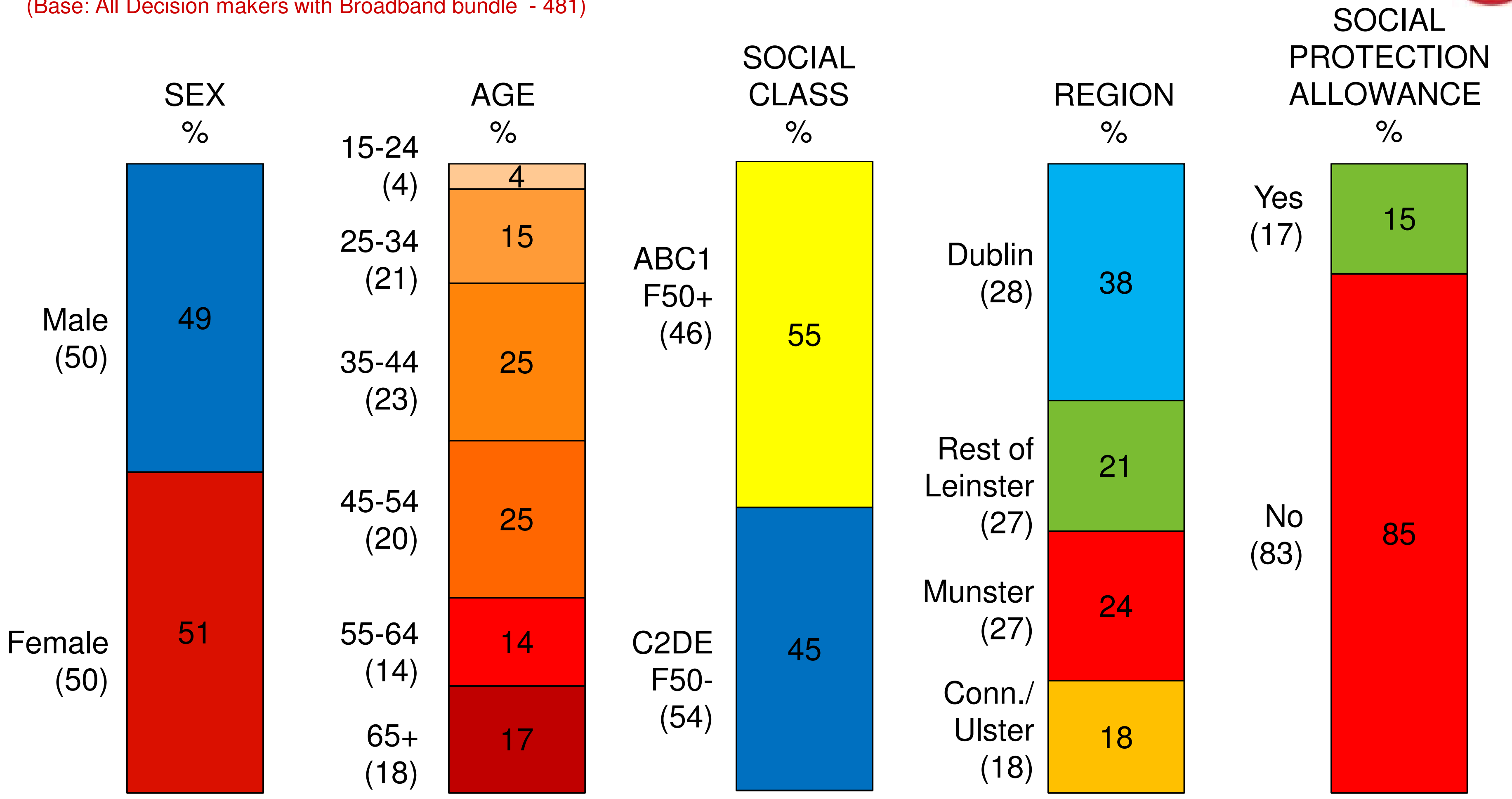


Landline Non Bundle population more likely older and from Munster Conn/Ulster and to avail of social protection allowance

() – National Profile

Demographic Profile Bundle Population

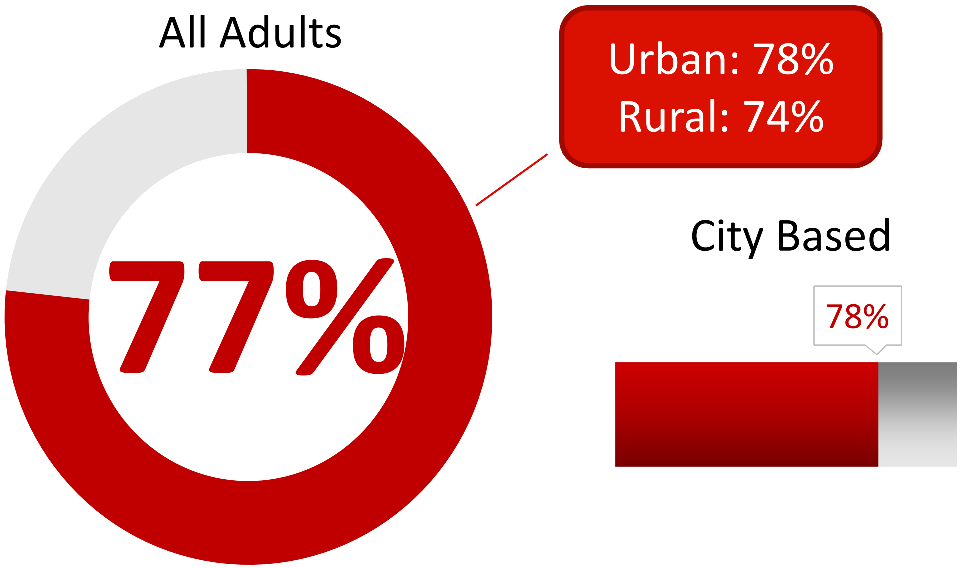
(Base: All Decision makers with Broadband bundle - 481)

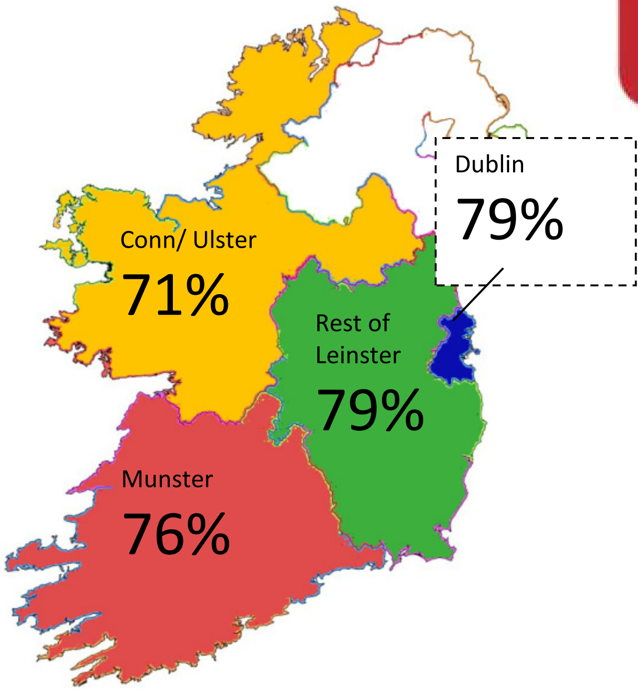


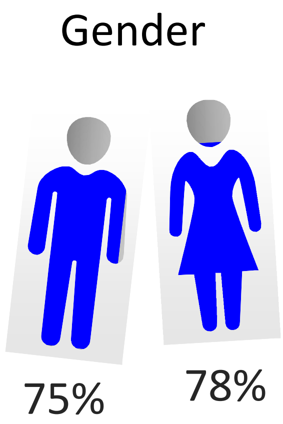
The Broadband bundle population most likely 25-34, higher social class and from Dublin

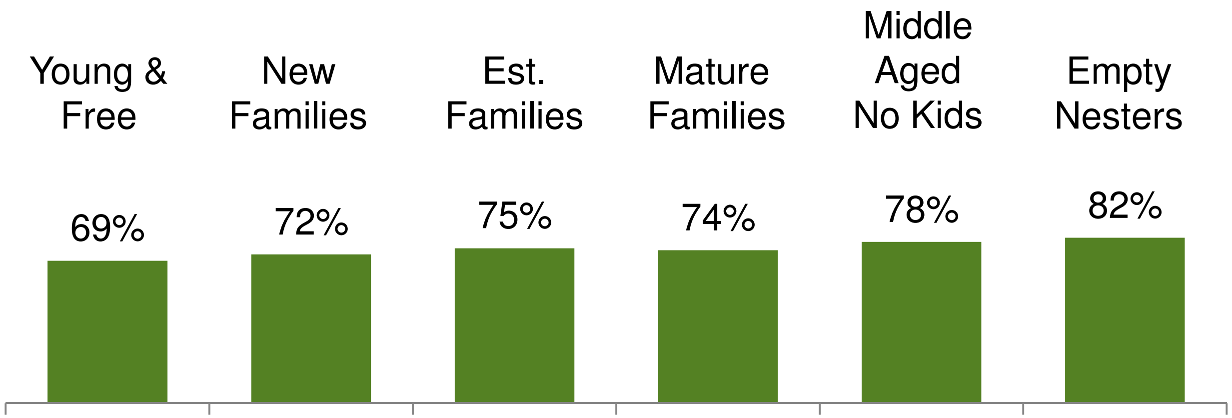
Satisfaction With Landline Service - All Providers.

(Base: All decision makers with Landline – 692, City Based 633)







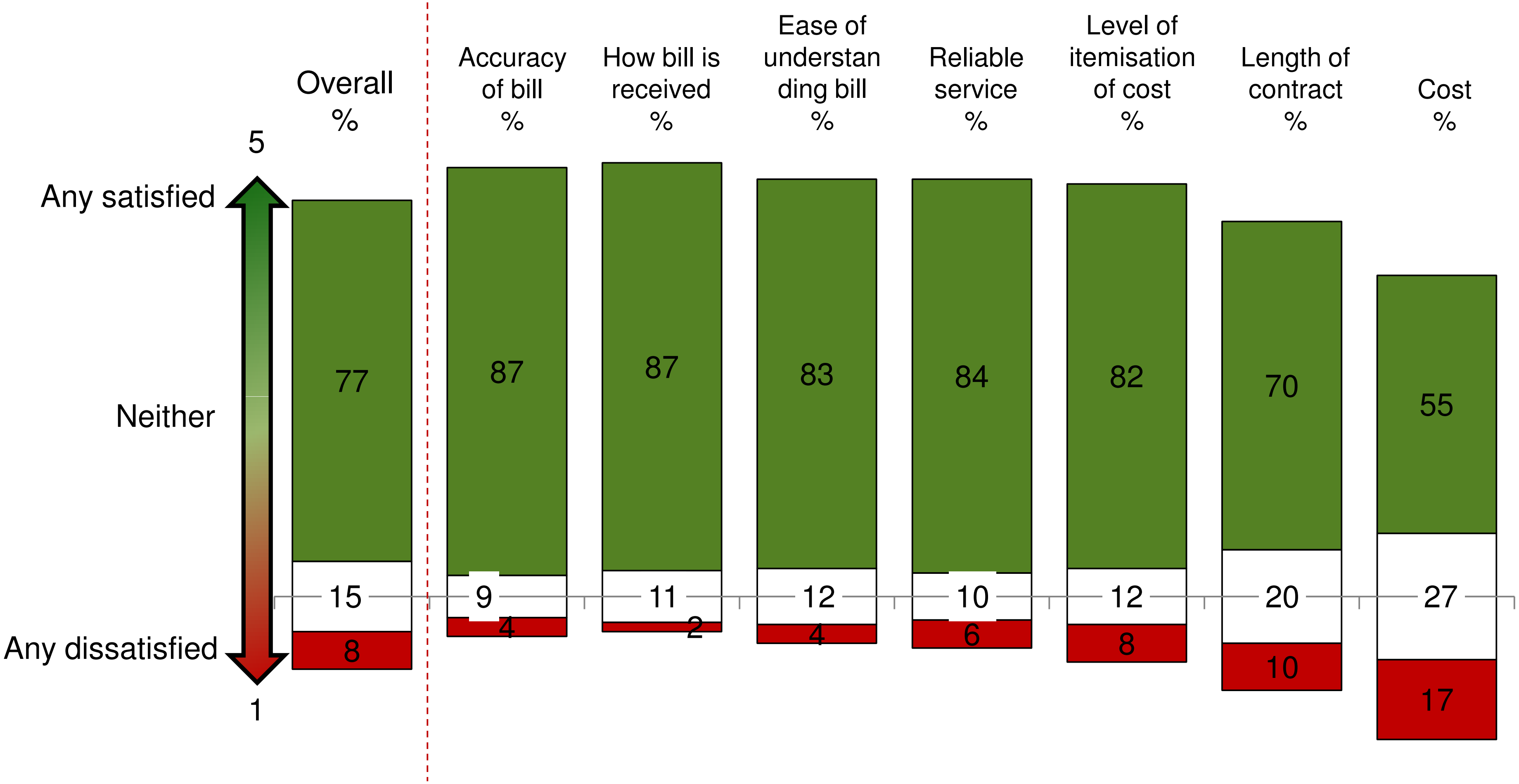


(Q 11a)

Satisfaction with landline service tends to rise with age. Satisfaction lowest in Conn/Ulster

Overall Satisfaction & Satisfaction On Various Elements Of Landline Service

(Base: All decision makers with Landline– 692)



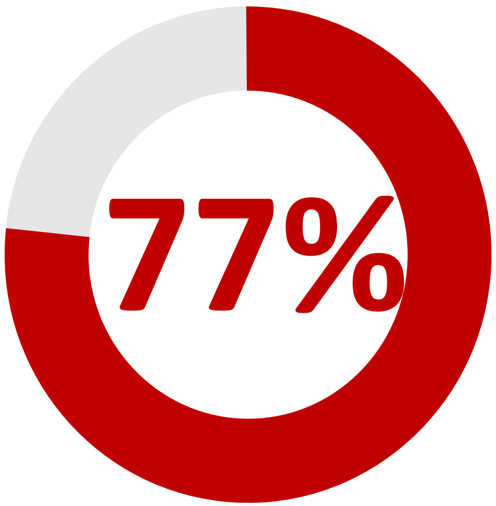
(Q 11b)

Satisfaction highest on billing measures and less so on contract length and cost

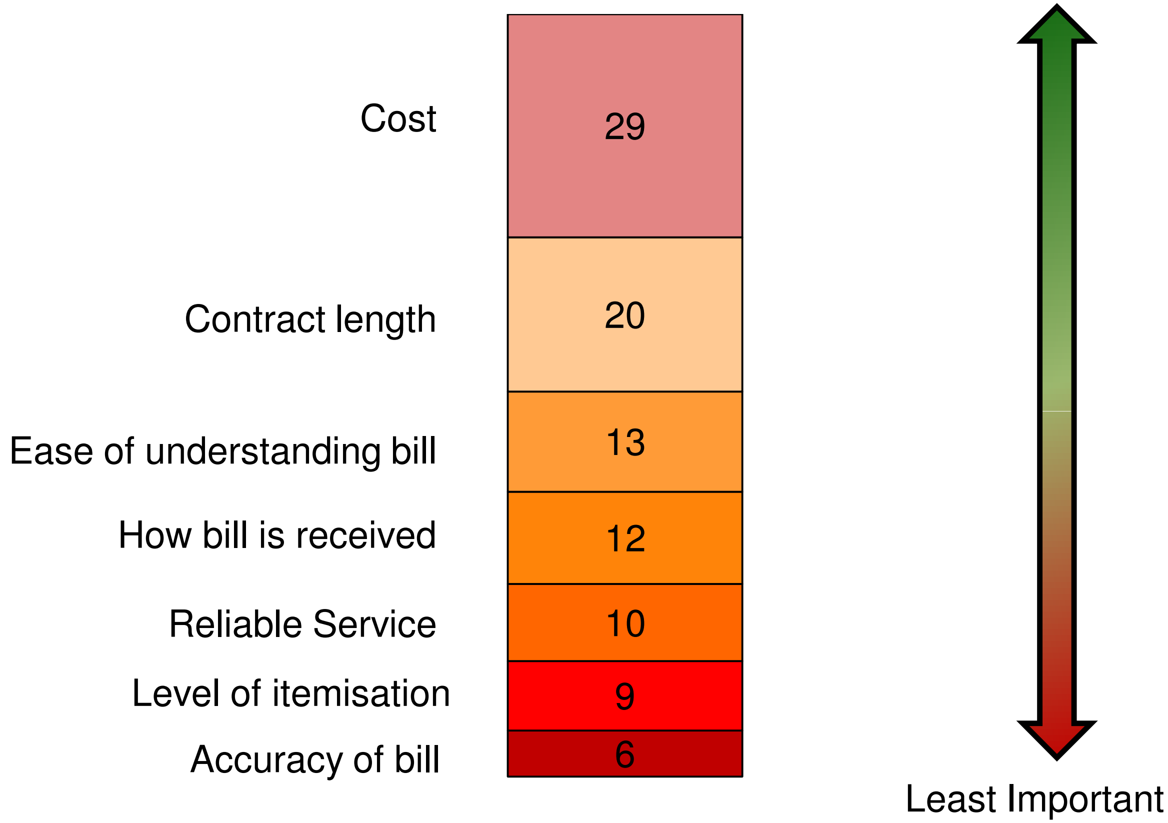
What Aspects Of Service Impact On Overall Satisfaction The Most

(Base: All decision makers with Landline – 692)

Overall Satisfaction



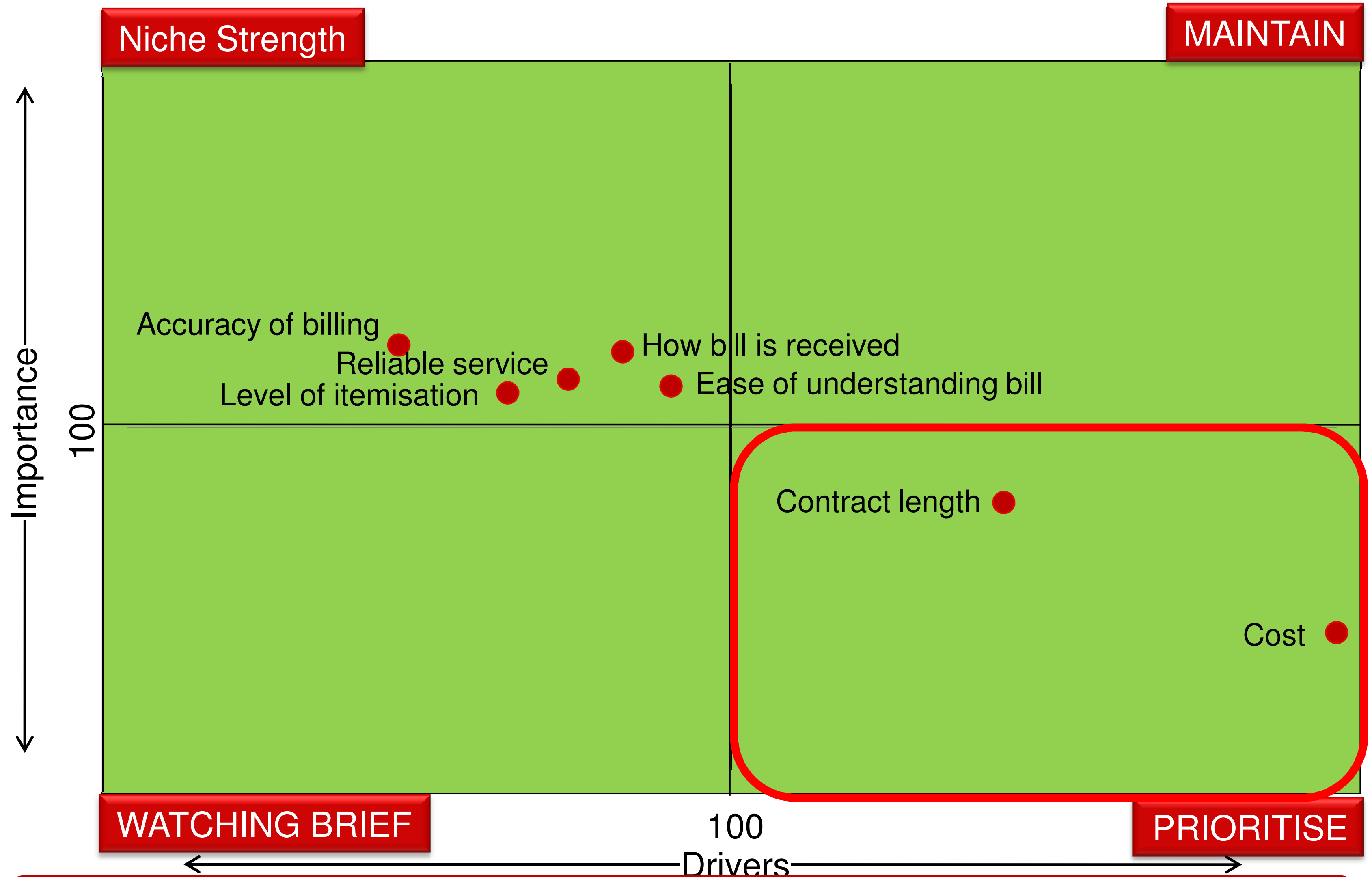
Factors Driving Overall Satisfaction %



Cost and Contract Length are the most important drivers of overall satisfaction.
Concentrating on these aspects will increase satisfaction more than any of the other measures

Identifying The Key Drivers To Overall Satisfaction

(Base: All decision makers with Landline – 692)



Contract Length and Cost are key drivers to improving overall satisfaction and areas in Which the market currently underperforms relative to the other variables measured

(Q 11b)

Length Of Time With Current Landline Provider

Landline not bundle
5+ Years
63%

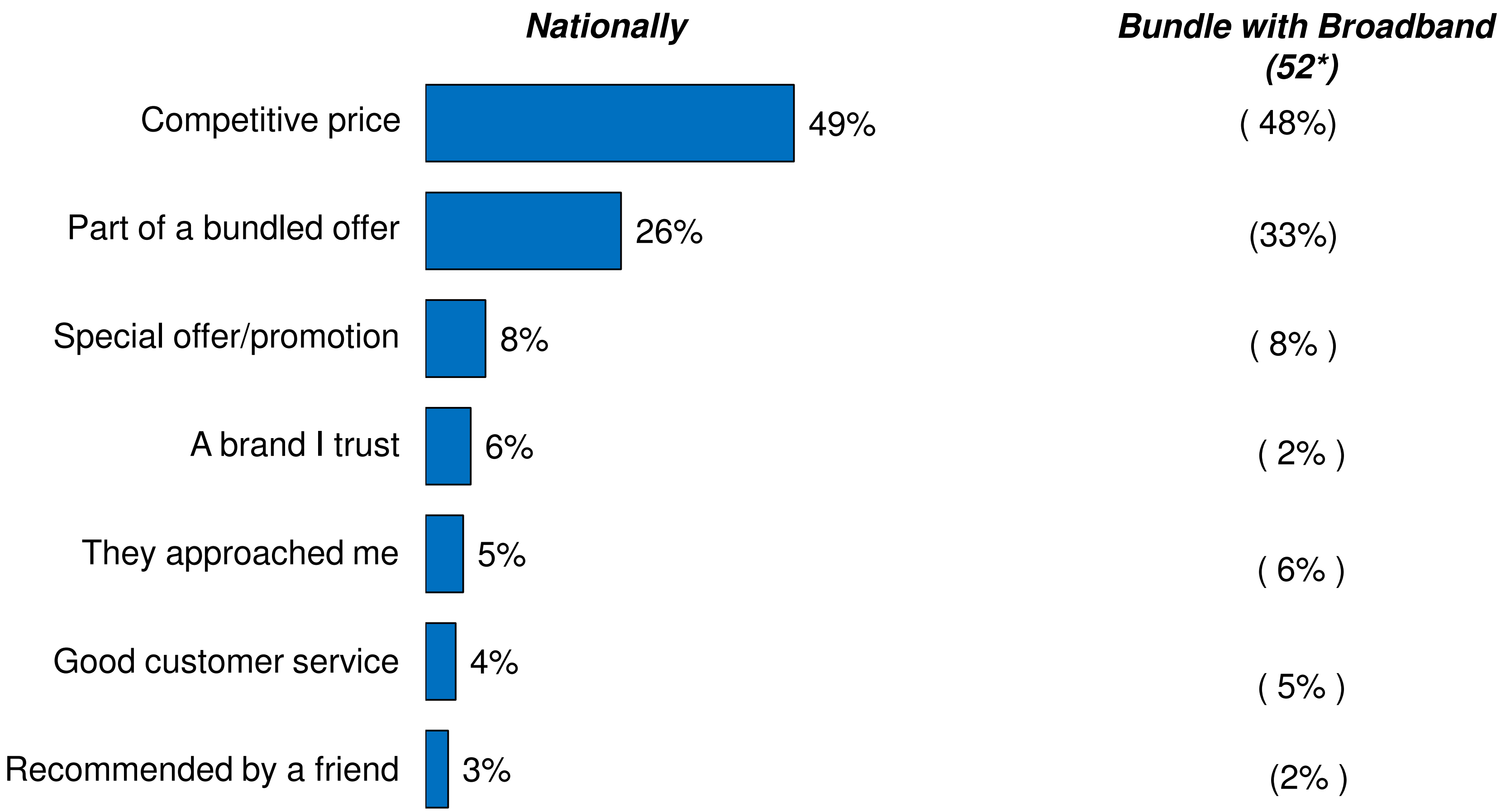
(Base: All decision makers with Landline – 692, City Based 633)

(Q 12)

Over 1 in 10 with current provider for one year or less, slightly higher in city areas

What Prompted The Selection Of Landline Provider Within Past Year

(Base: All decision makers who joined new provider – 81)



(Q 13)

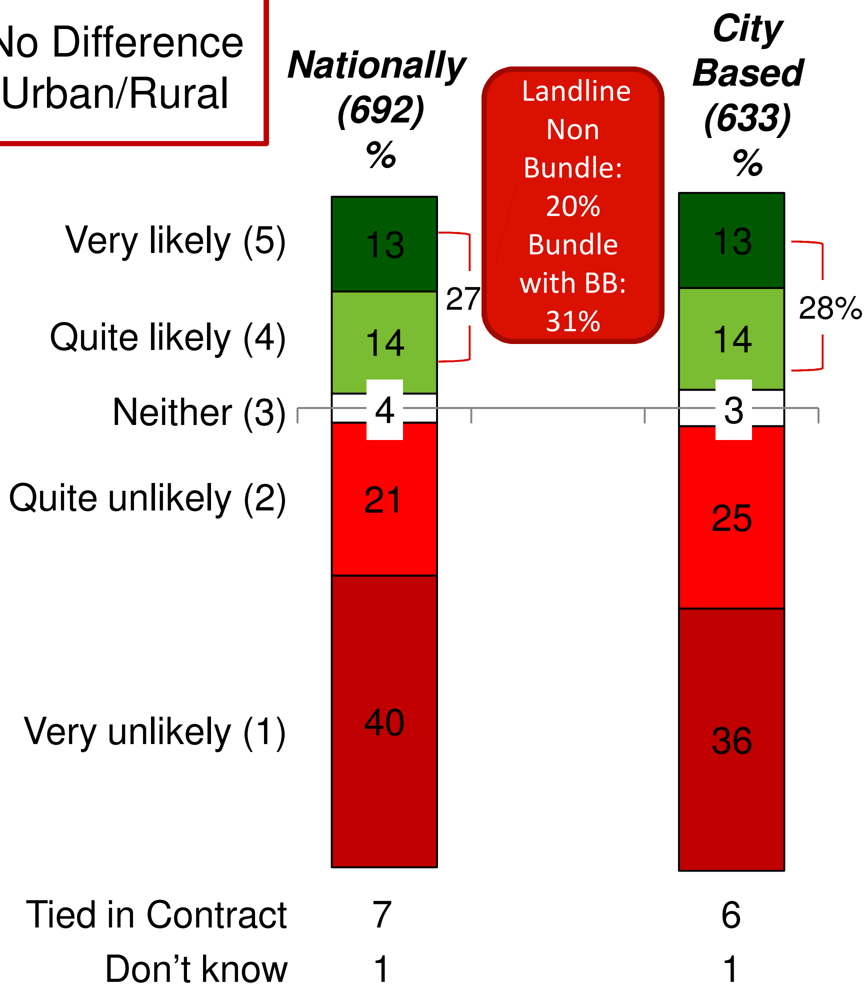
City base too small to show

* Small Base

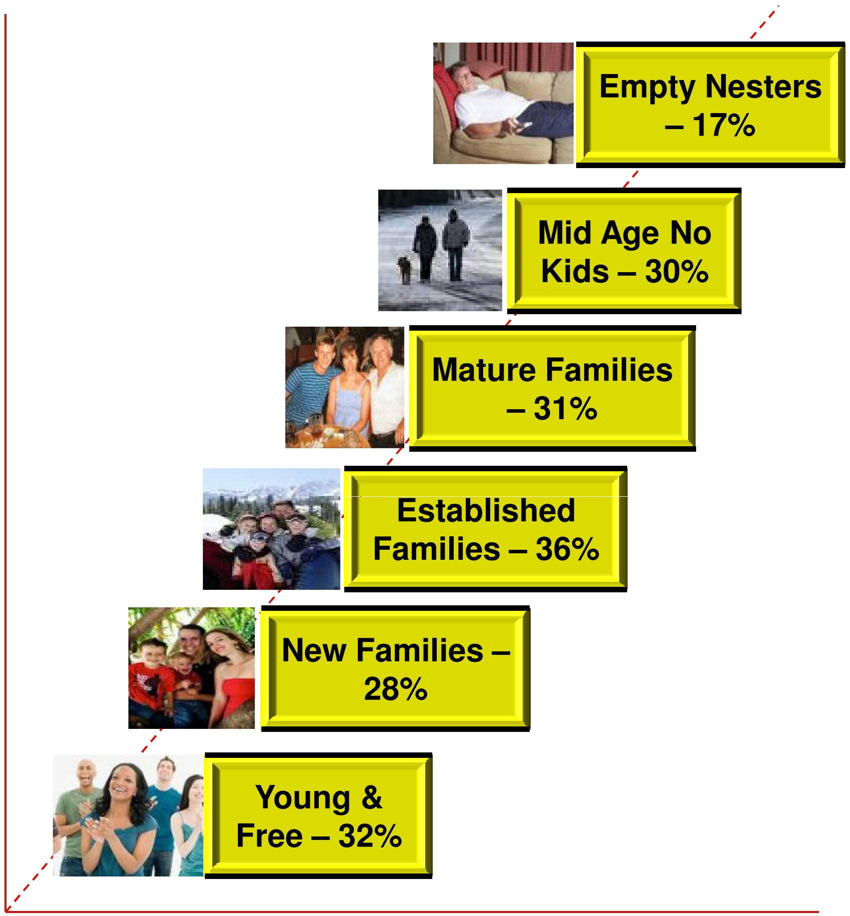
Consideration Of Switching – Next 12 Months

(Base: All decision makers with landline – 692, City Based 633)

No Difference Urban/Rural



Life stage Consideration To Switch

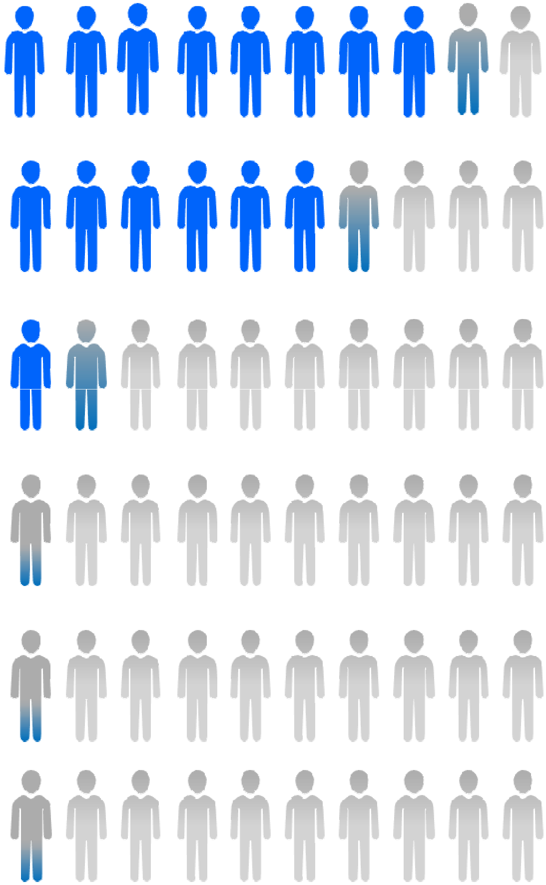


Consideration to switch is higher at over 1 in 4 claiming they will switch next 12 months. Established Family homes most likely to switch

(Q 14)

What Home Landline Telephone Service Is Used For?

(Base: All decision makers with Landline Service – 692, City Basesd 633)



	National	BB Bundle	Young & Free	City Based
To make calls	87%	84%	64%	87%
To receive calls	65%	64%	40%	66%
Access to broadband	19%	25%	32%	18%
I just have it for security	3%	3%	-%	2%
I do not use the landline	2%	3%	7%	3%
Is required for my alarm to work	2%	2%	2%	2%

Telephone service most likely used for making calls. Young and Free group using landline service differently to other groups with access to broadband more important

C

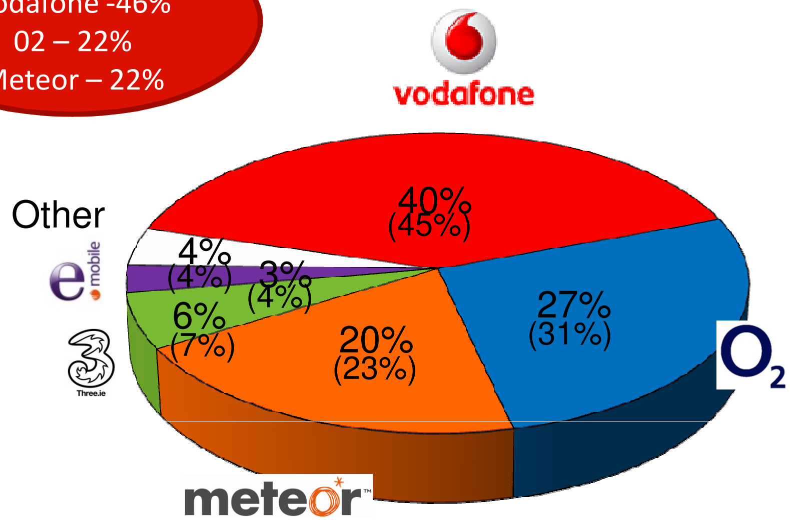
Mobile Phone

Mobile Phone Provider

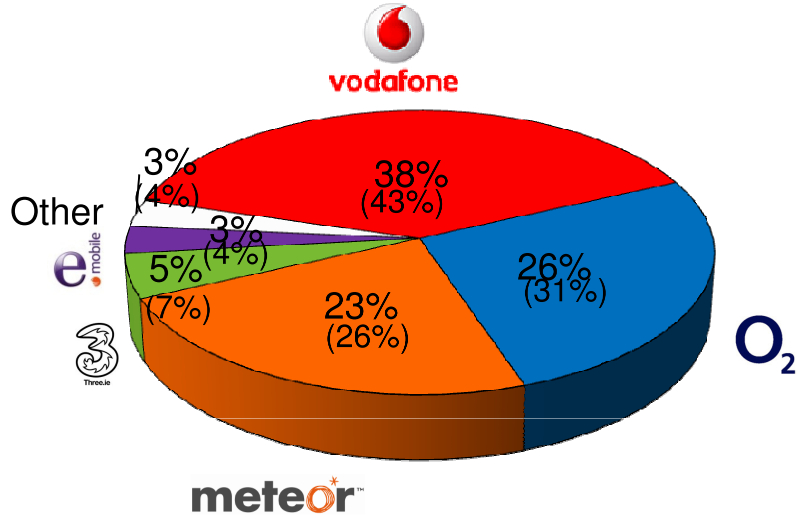
(Base: All decision makers with Mobile Phone – 975, City Based, 880)

2011
Vodafone -46%
02 – 22%
Meteor – 22%

Nationally



City Based



	Main Provider				
	Vodafone	**O2**	**Meteor**	**3**	**E-mobile**
Dublin	37%	26%	25%	5%	3%
Cork	42%	32%	12%	6%	4%
Limerick	39%	31%	17%	2%	7%
Galway	37%	24%	28%	5%	5%

Meteor taking slightly higher share in the city sample highest in Dublin and Galway

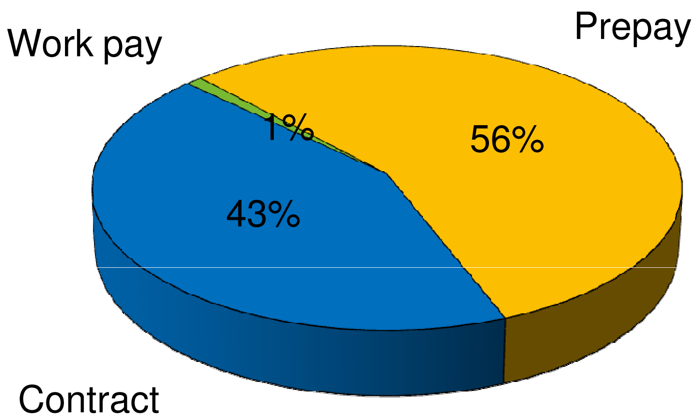
(Q 5a/b)

( ) = Any Provider Share

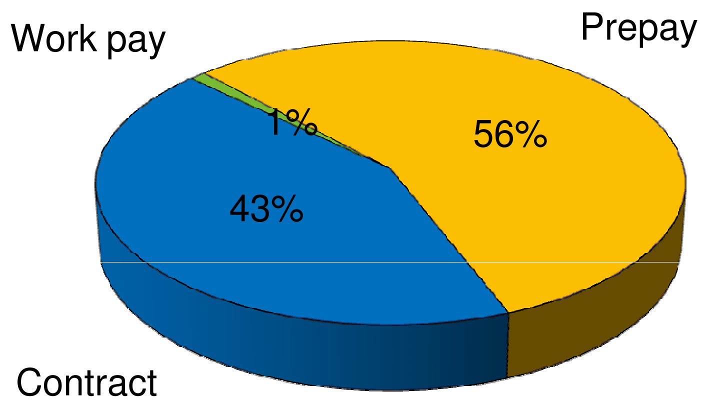
Contract Type

(Base: All decision makers with Mobile Phone – 975, City Based, 880)

Nationally



City Based



2011
Pre Pay
62%

Empty Nesters

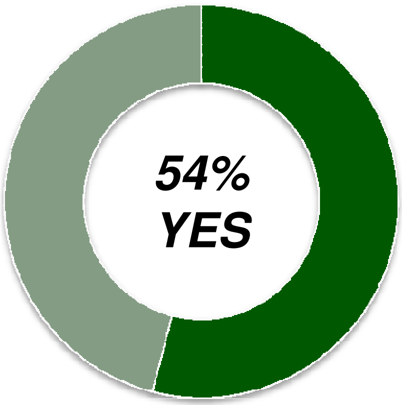
Significantly higher PrePay

Over 2 in 5 have a contract with their mobile phone supplier. Prepay highest for Empty Nesters

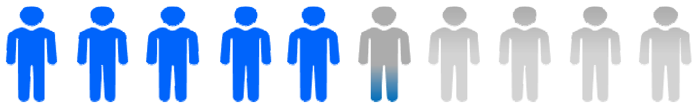
Smartphone Ownership

(Base: All decision makers with Mobile Phone – 975, City Based, 880)

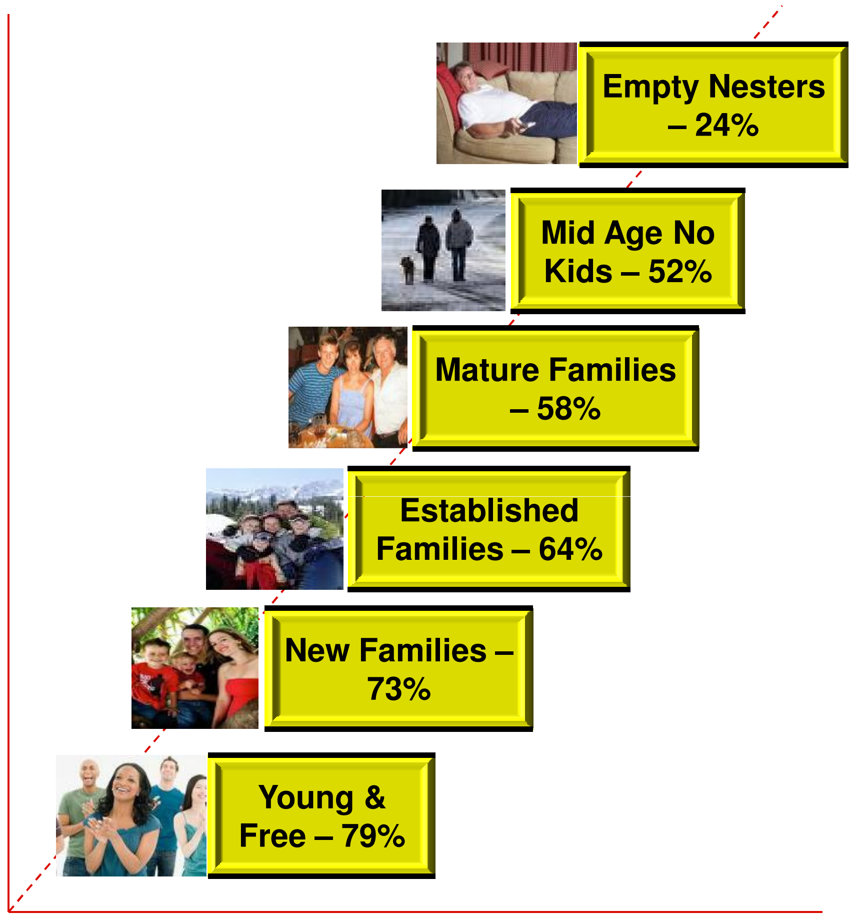
Smart phone 2011 - 54%



54%
City Based



Life Stage



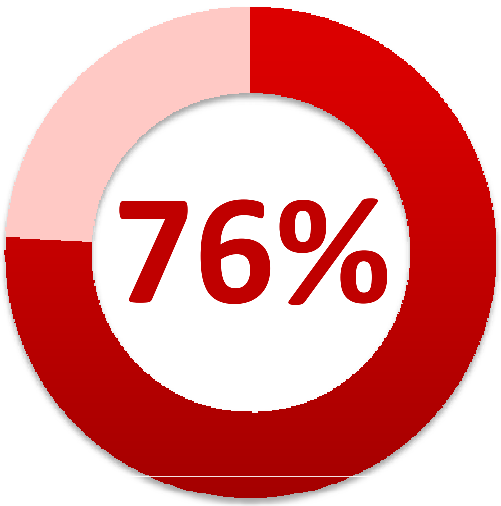
Over half have a Smartphone highest among Young and Free

(Q 18)

Satisfaction With Mobile Phone Service

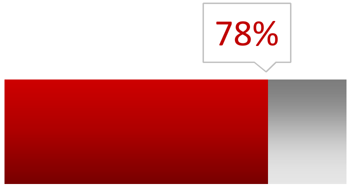
(Base: All decision makers with Mobile Phone – 975, City Based, 880)

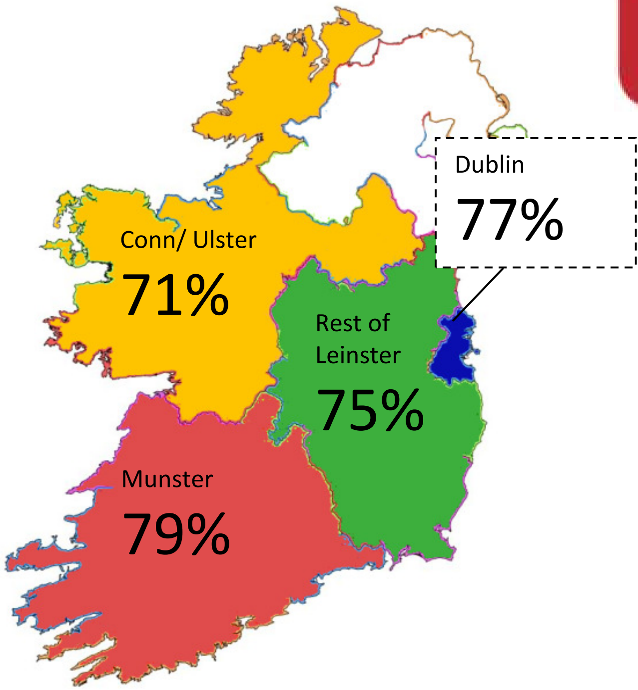
All Adults



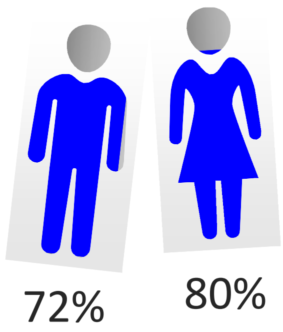
Urban: 78%
Rural: 73%

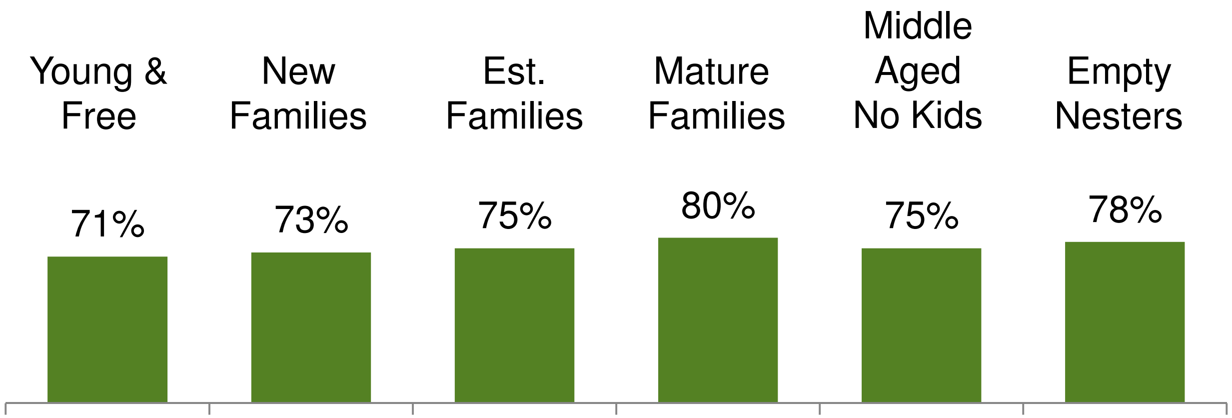
City Based





Gender



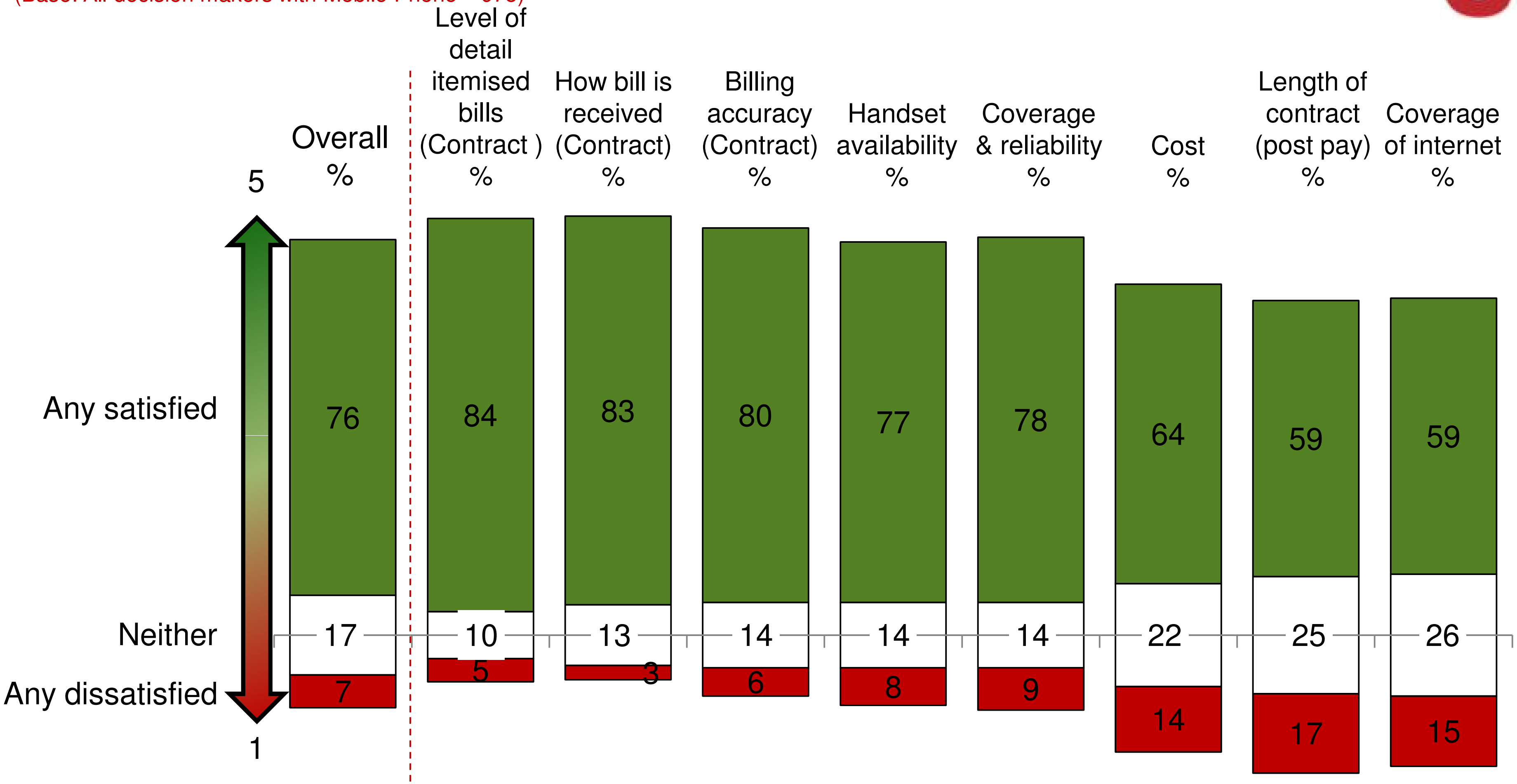


(Q 19a)

Satisfaction with mobile service is high and generally equally spread

Satisfaction With Mobile Phone Service

(Base: All decision makers with Mobile Phone – 975)

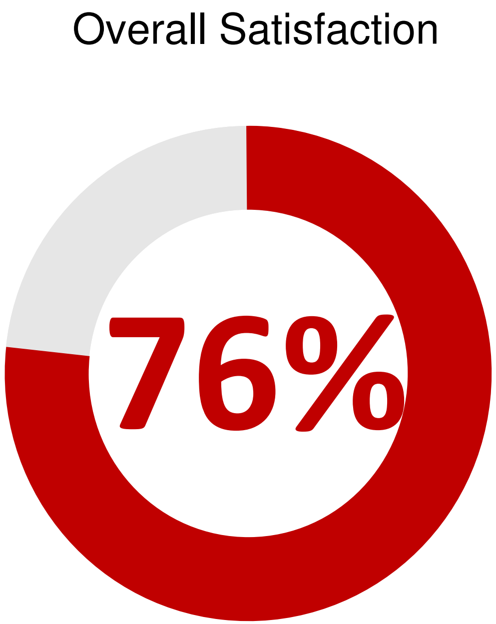


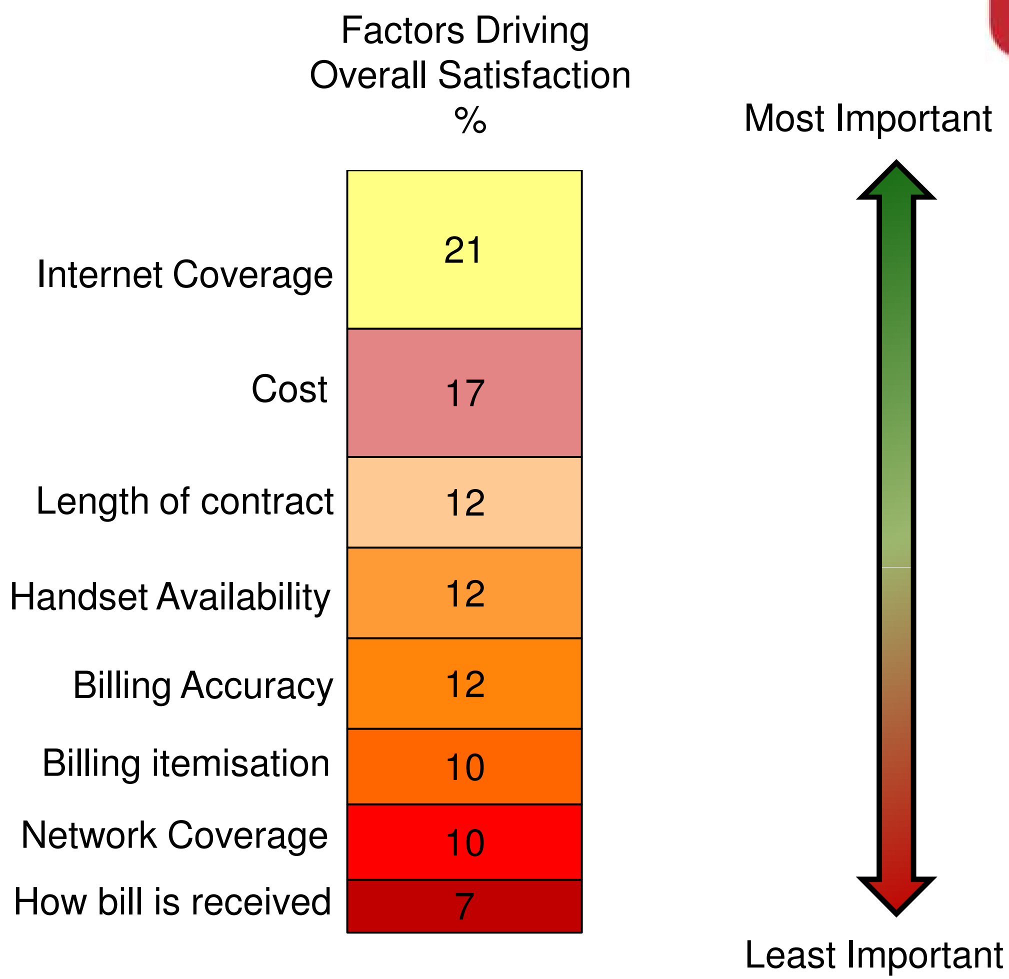
Similar to landline satisfaction is higher on bill elements. Satisfaction lowest of cost, contract length and internet coverage on phone

(Q 19b)

What Aspects Of Service Impact On Overall Satisfaction The Most

(Base: All decision makers with Mobile Phone – 975)

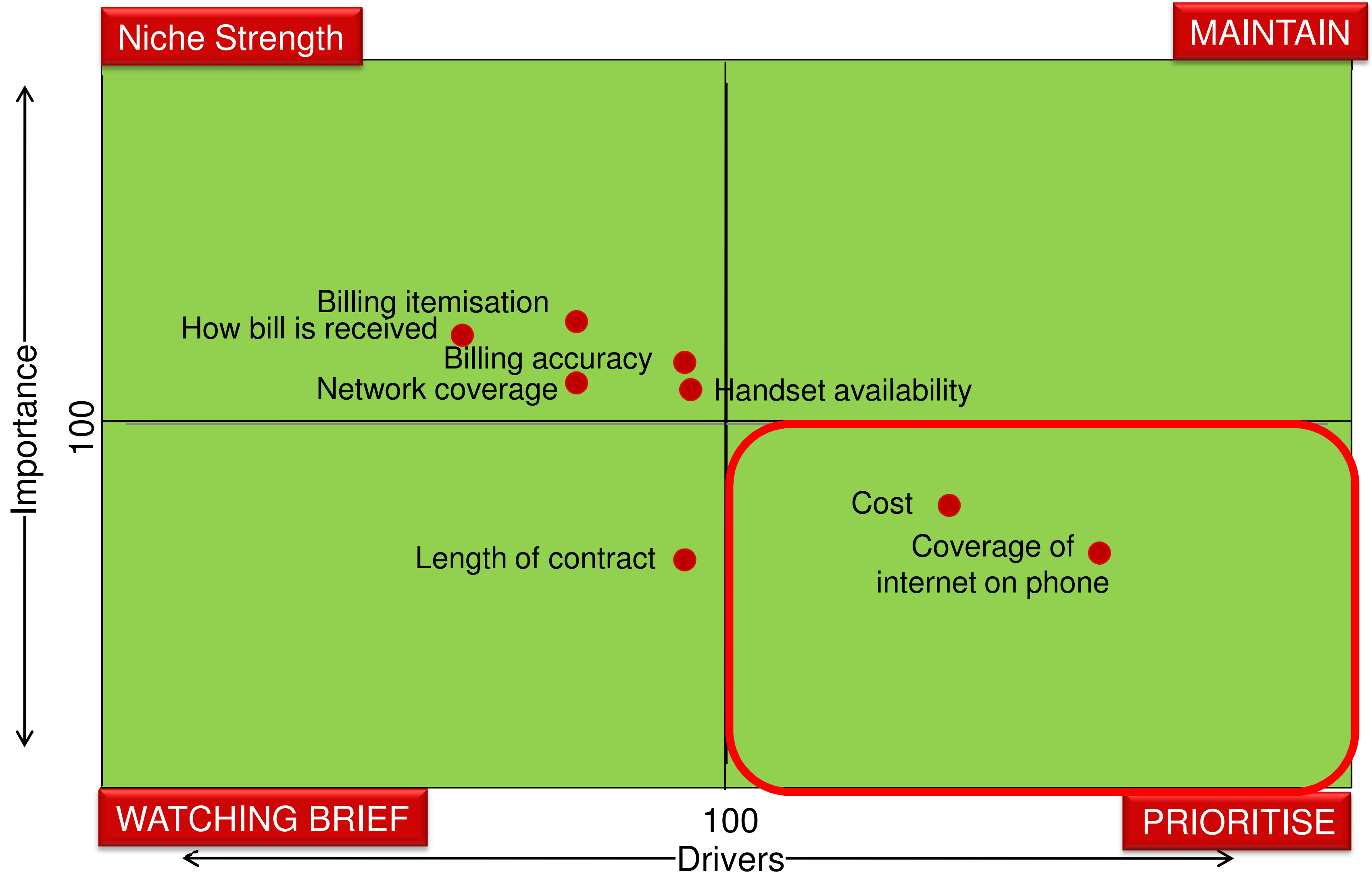




Cost and internet coverage are key drivers of satisfaction

Identifying The Key Drivers To Overall Satisfaction

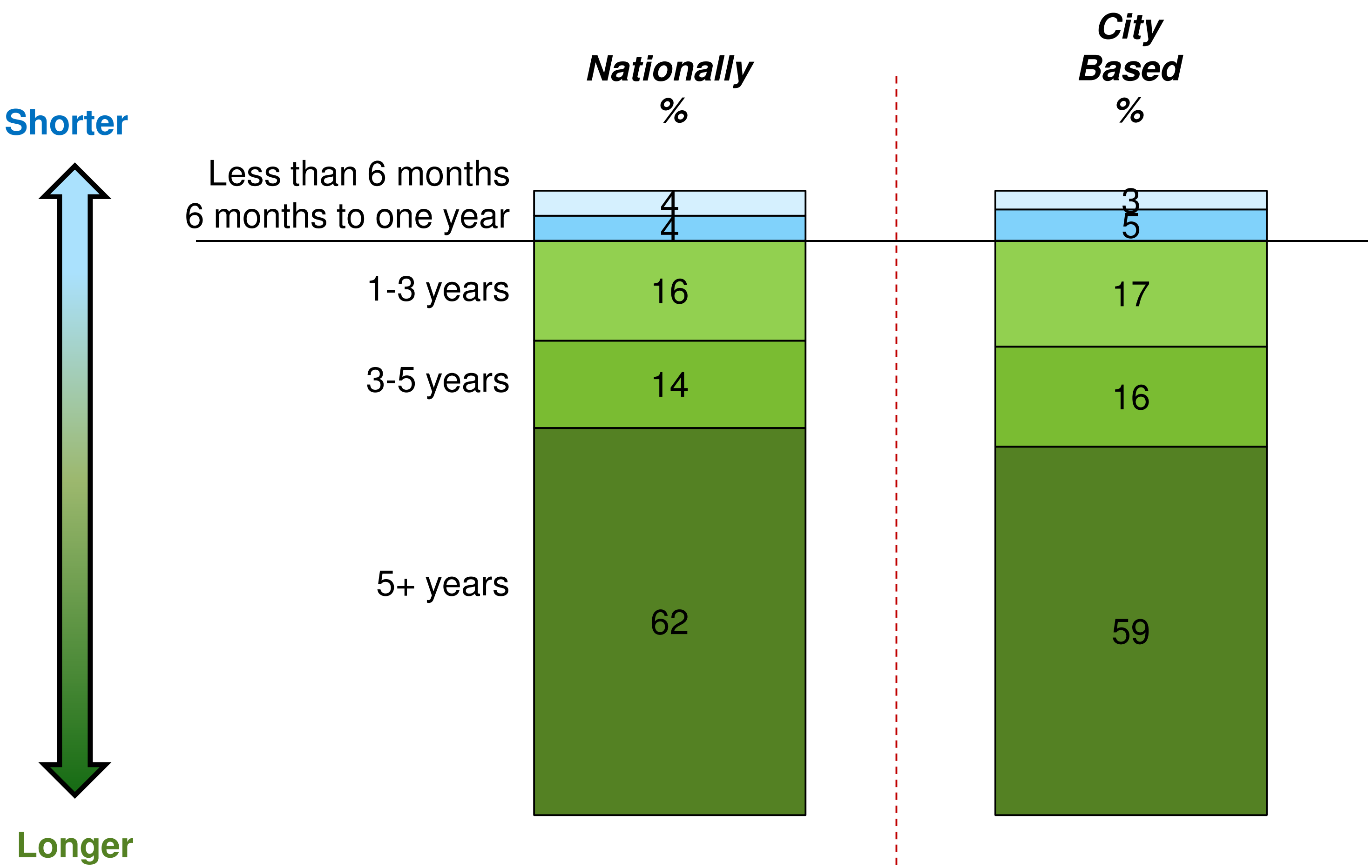
(Base: All decision makers with Mobile Phone – 975)



(Q.19b)

Length Of Time With Current Mobile Phone Provider

(Base: All decision makers with Mobile Phone – 975, City Based, 880)

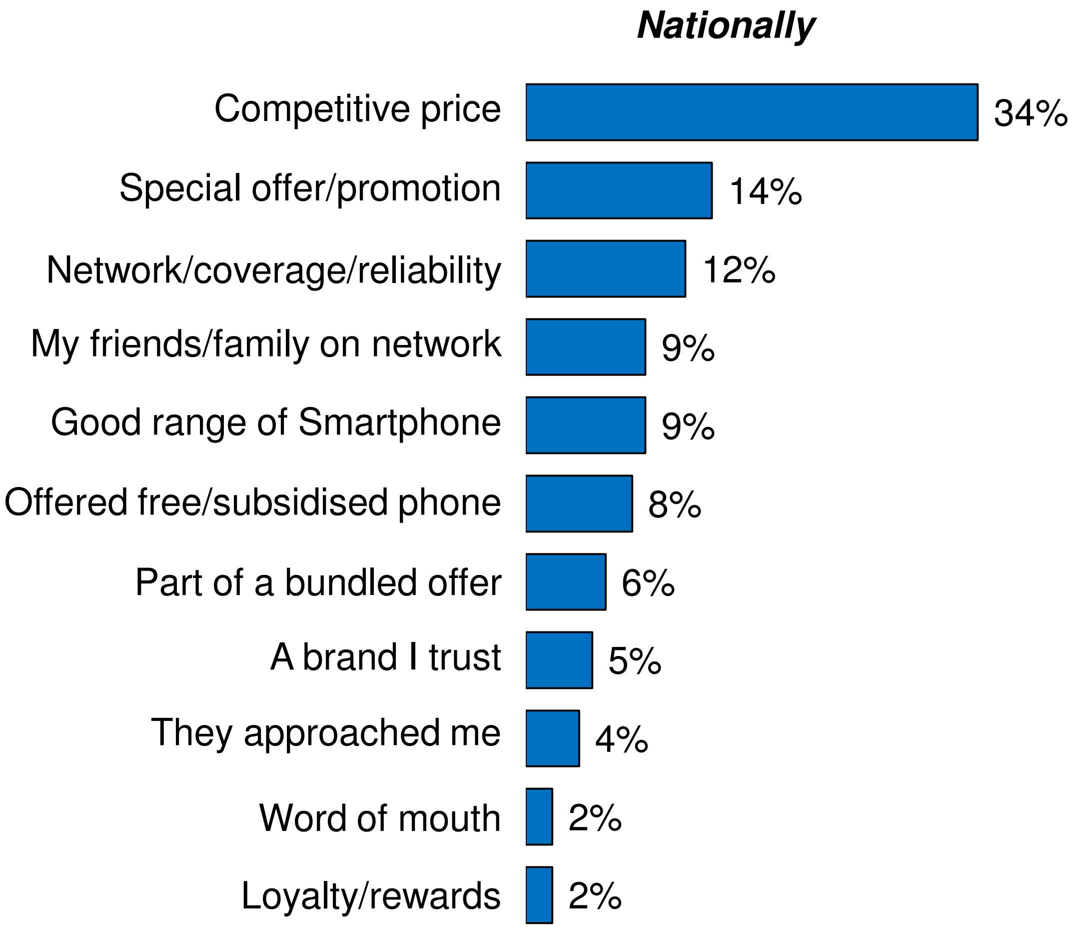


Little claimed movement in provider past 12 months with less than 1 in 10 with current provider for a year or less

(Q 20)

What Promoted The Selection Of Mobile Phone Provider Within Past Year

(Base: All decision makers with Phone Provider Past 12 Months – 80)

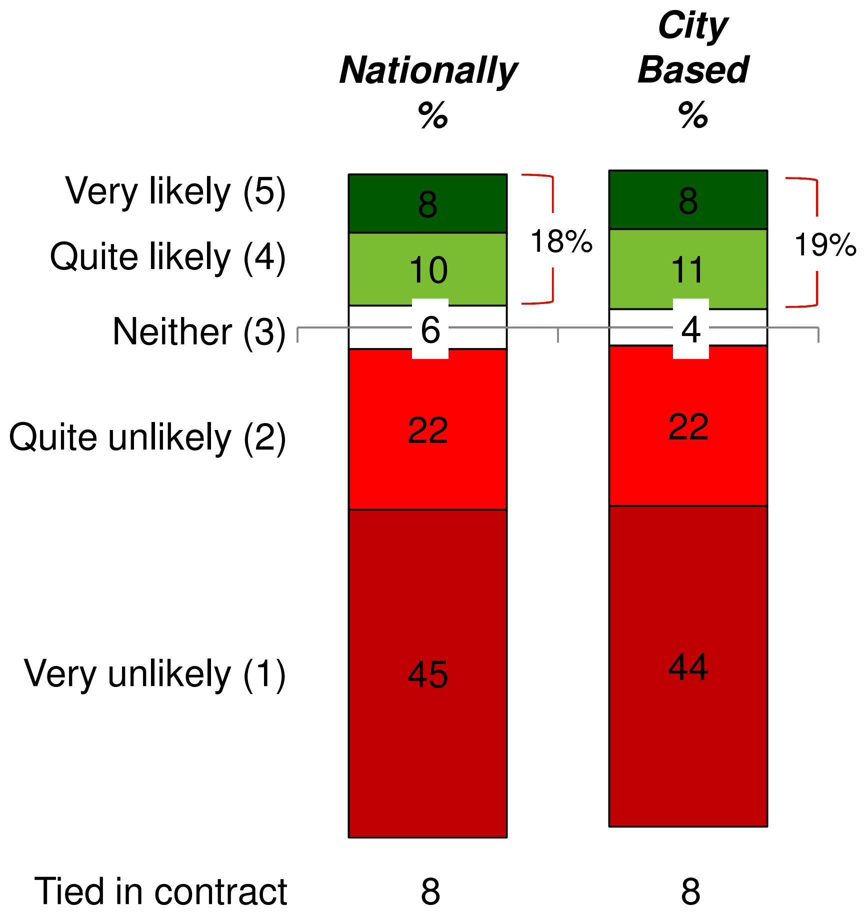


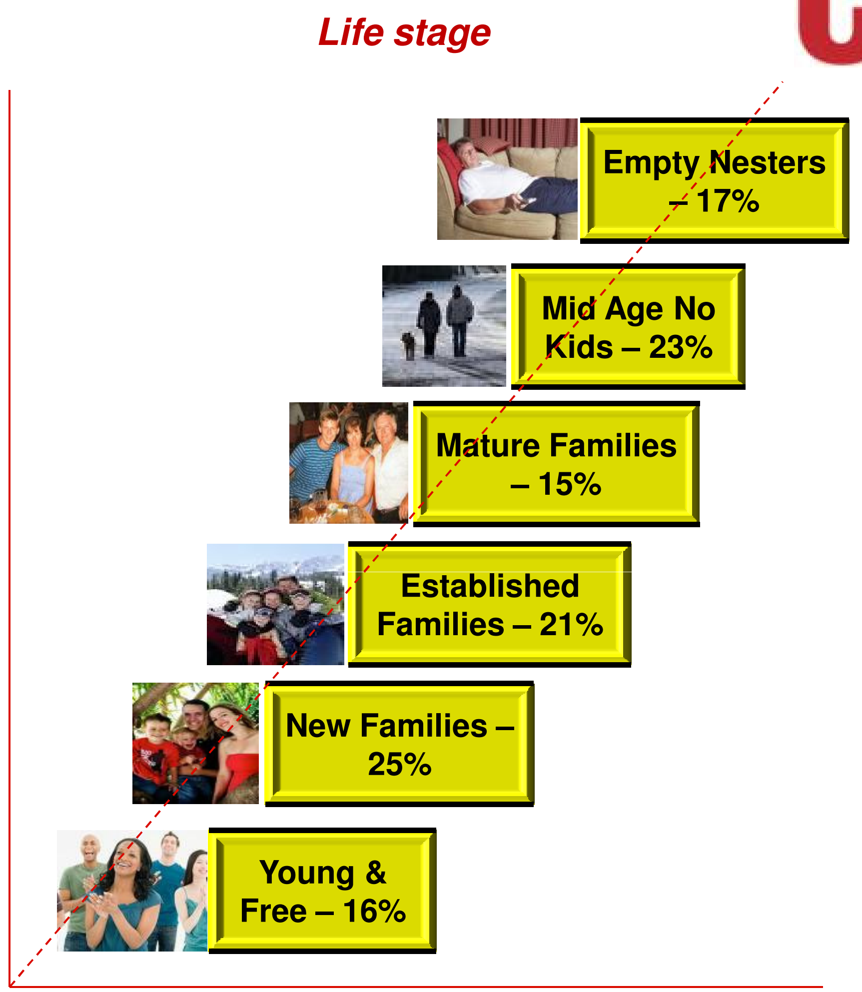
Along with price network coverage/reliability is a key reason for joining new providers

(Q 21)

Consideration Of Switching – Next 12 Months

(Base: All decision makers with Mobile Phone – 975, City Based, 880)





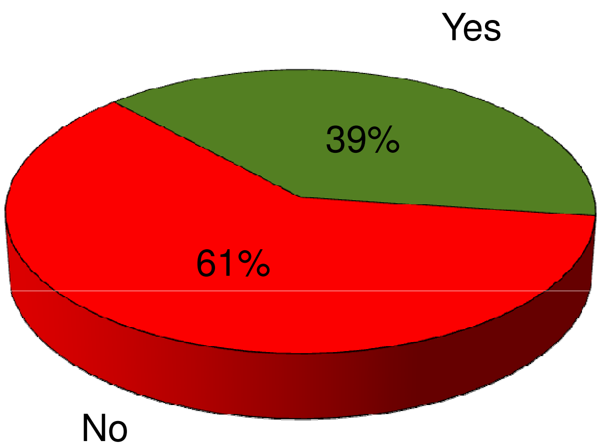
Claimed likelihood to switch is higher than actual movement in the past year.Switching Intention is lower in the mobile phone market than that witnessed in landline.

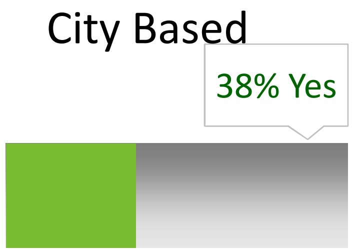
(Q 22)

Incidence Of Receiving Text Advising That You Are Close To Data Allowance

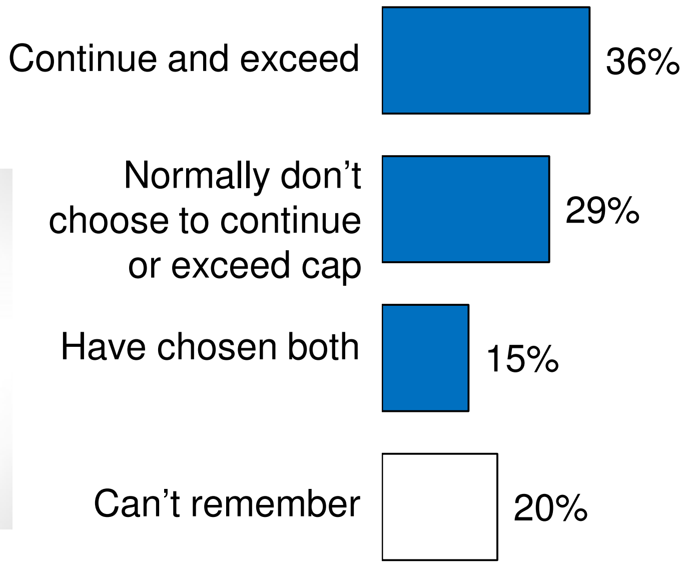
(Base: All decision makers who are Smartphone Owners – 518, City Based - 474)

Nationally





Impact of Message



Almost 2 in 5 Smartphone owners received a text advising of data allowance limit

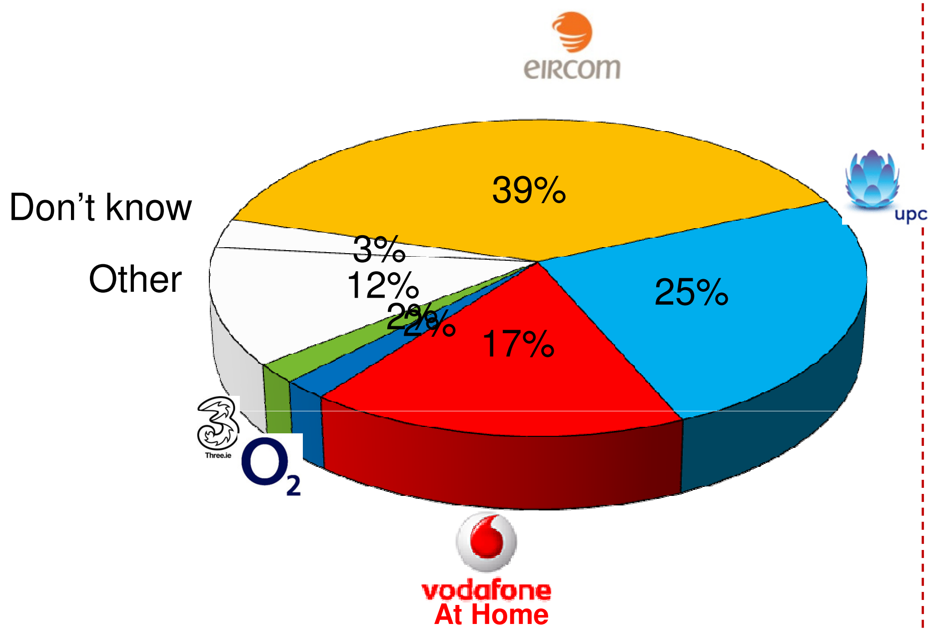
(Q 24/25)

Fixed Broadband

Main Fixed Line Broadband Provider

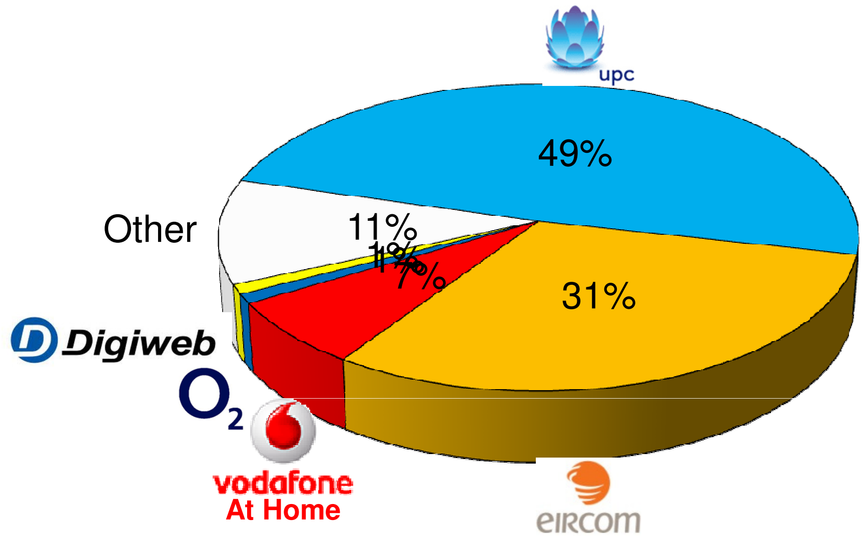
(Base: All decision makers with Fixed Broadband – 659, City Based - 662)

Nationally



	Urban	Rural	Non Bundle landline	Bundle Broadband included
Eircom	38	43	16	48
UPC	35	5	19	29
Vodafone	13	26	21	17

City Based



	Main Provider		
	Eircom	UPC	Vodafone
Dublin	29%	55%	4%
Cork	39%	16%	23%
Limerick	39%	27%	15%
Galway	42%	30%	11%

(Q 7a/b)

Eircom have a dominant share nationally yet not so in city areas particularly in Dublin

( ) = Any Provider Share = Main Share

Others: Digiweb, Magnet, Imagine, Sky, Gaelic Telecom, Irish Broadband, Pure, Clearwire.

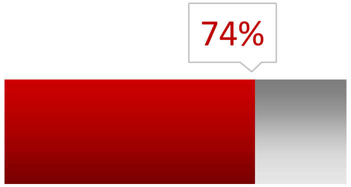
Satisfaction With Fixed Broadband Service

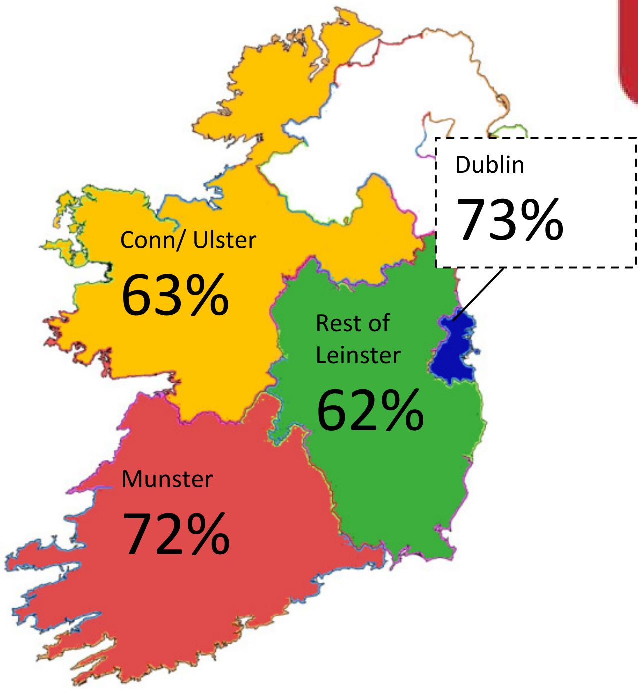
(Base: All decision makers with Fixed Broadband – 659, City Based - 662)

All Adults

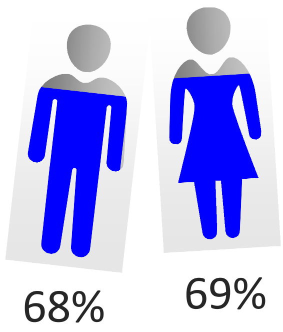
Urban: 74%
Rural: 58%

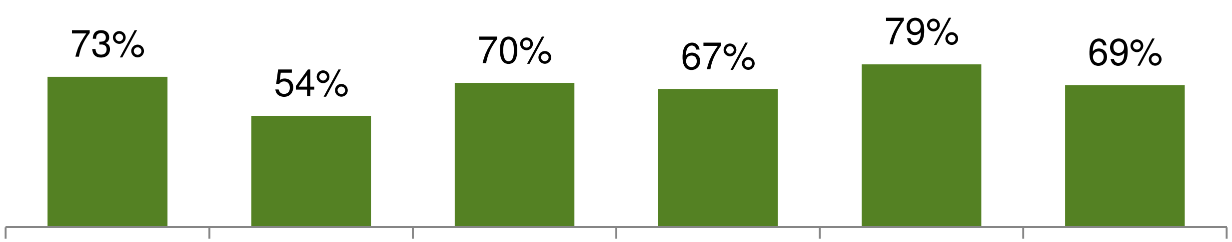
City Based





Gender



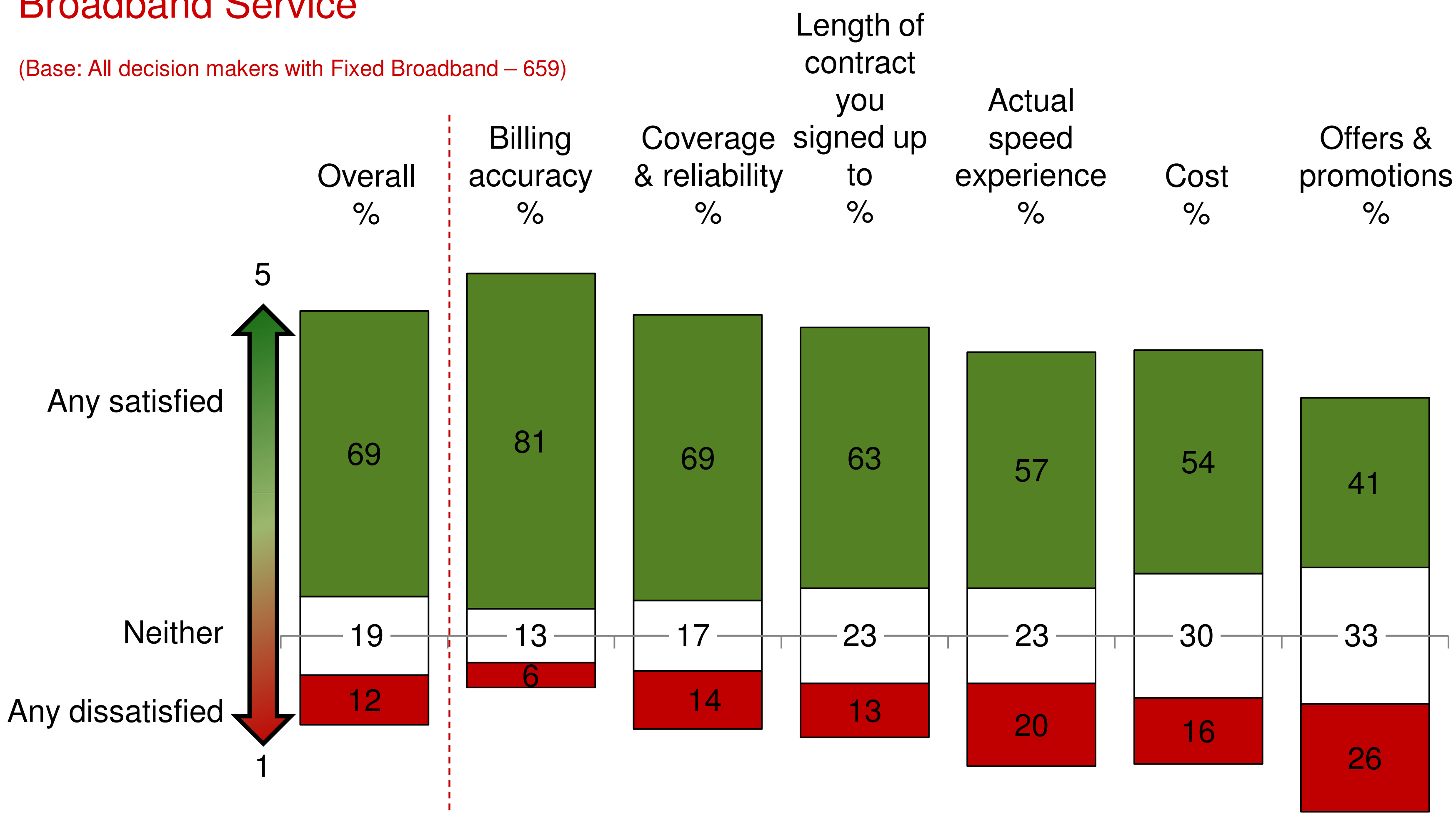


(Q 36a)

Satisfaction with fixed broadband service is higher in city areas and highest among middle aged families with no kids

Overall Satisfaction and Satisfaction On Various Elements Of Fixed Broadband Service

(Base: All decision makers with Fixed Broadband – 659)



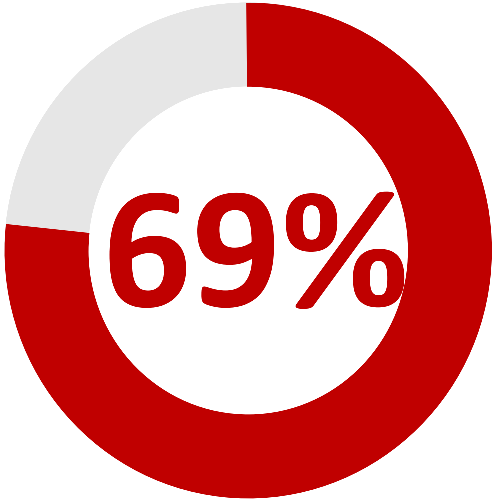
Users are most satisfied with billing accuracy and least so on actual speed, cost and offers and promotions

(Q 36b)

What Aspects Of Service Impact On Overall Satisfaction The Most

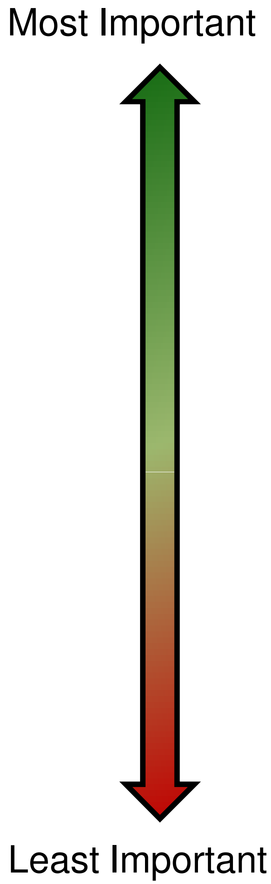
(Base: All decision makers with Fixed Broadband – 659)

Overall Satisfaction



Factors Driving Overall Satisfaction %

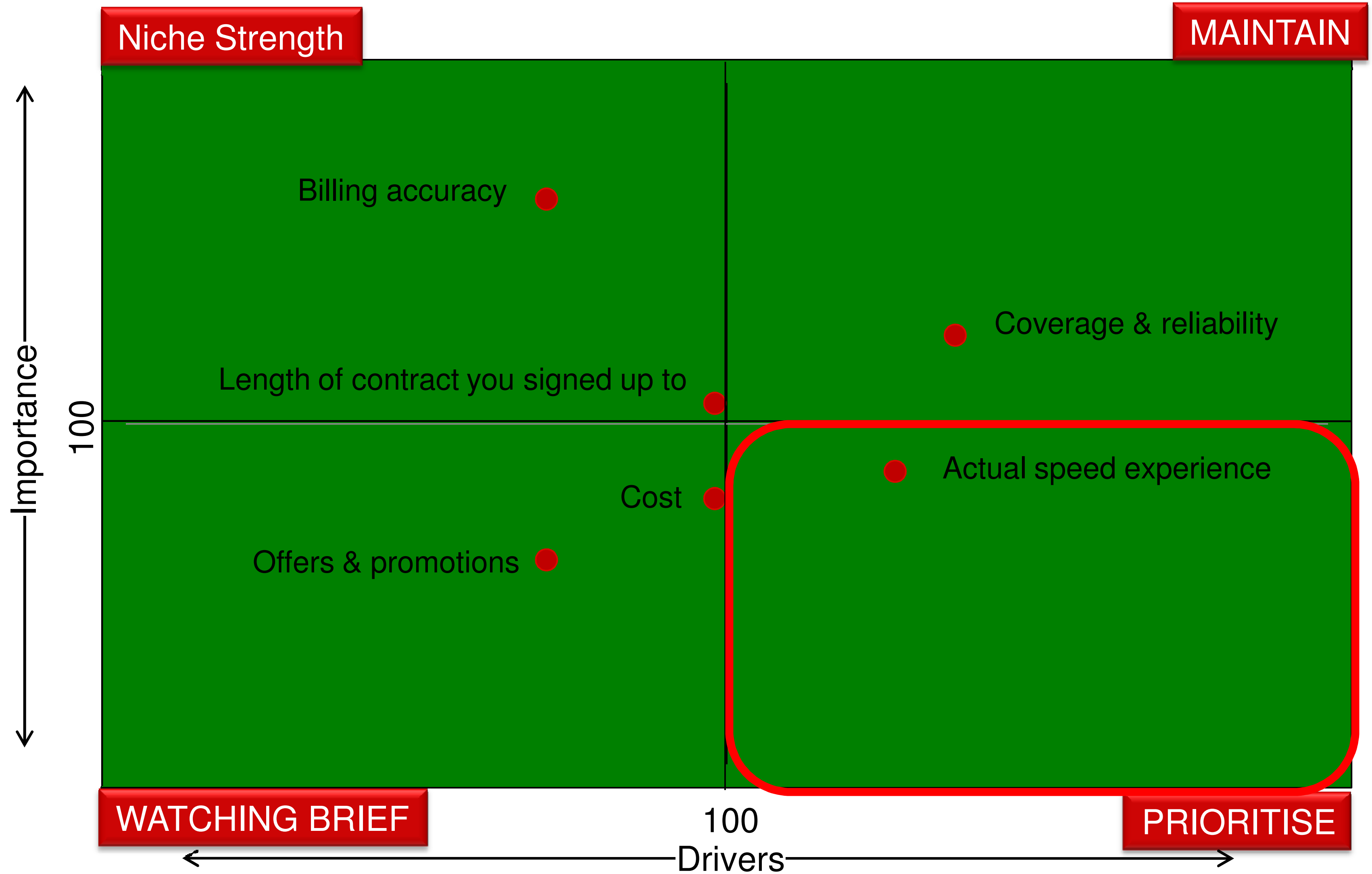
Coverage/Reliability	23
Actual Speed	21
Cost	16
Length of Contract	16
Billing Accuracy	12
Offers and Promotions	12



A priority area for improvement is coverage/reliability and speed of service experienced

Identifying The Key Drivers To Overall Satisfaction

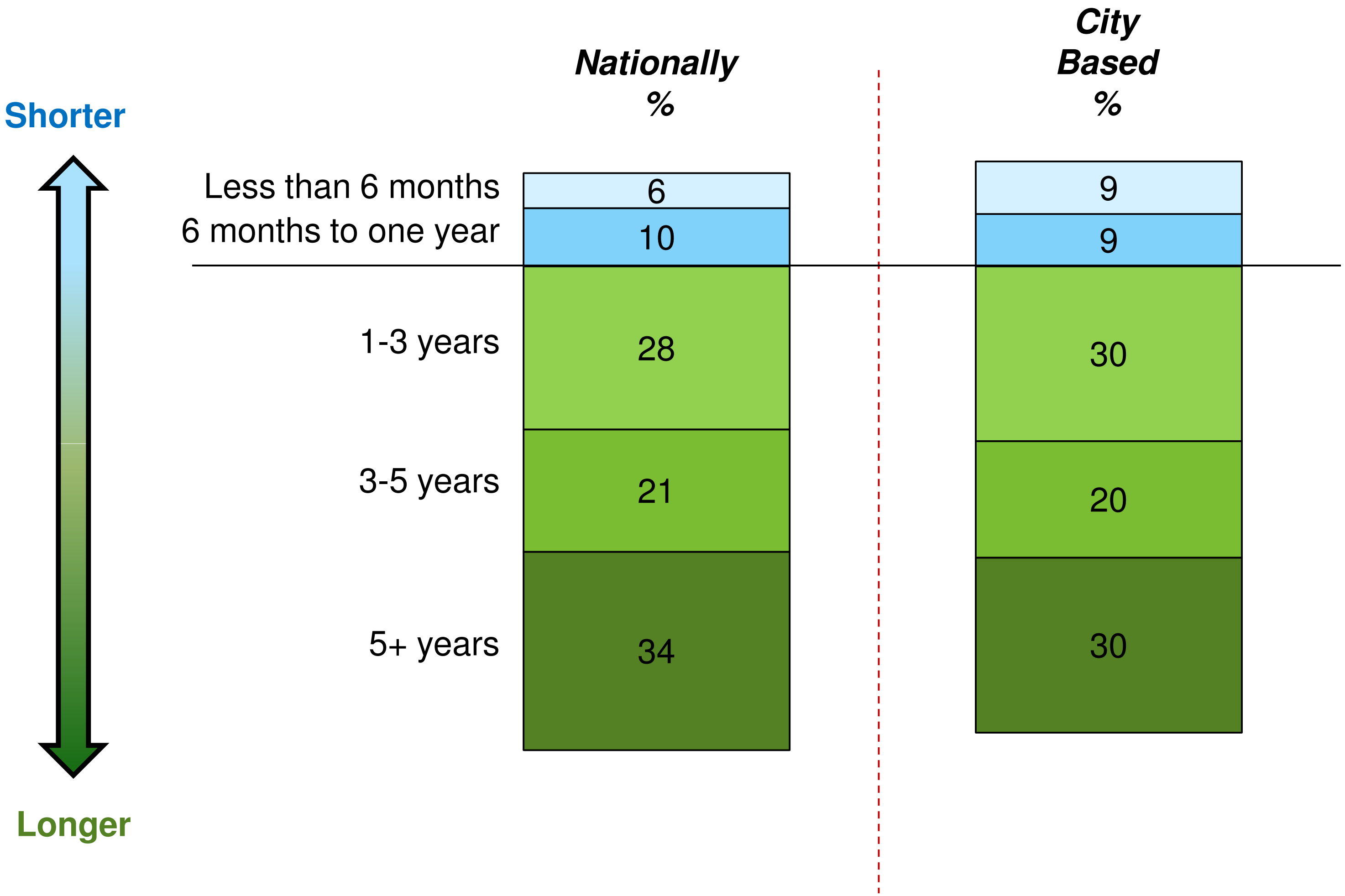
(Base: All decision makers with Fixed Broadband – 659)



(Q.19b)

Length Of Time With Current Fixed Broadband Provider

(Base: All decision makers with Fixed Broadband – 659, City Based - 662)

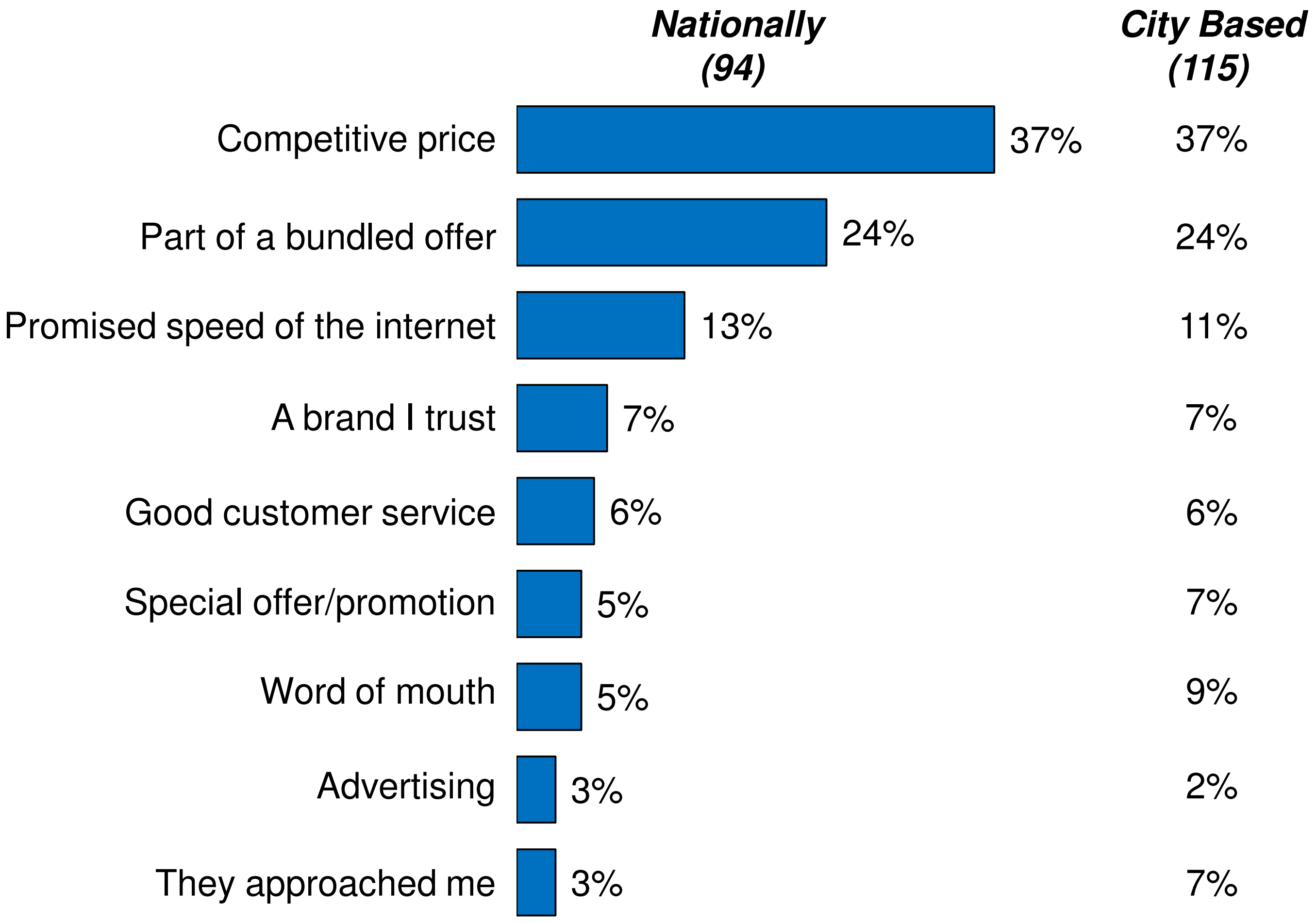


Almost 1 in 5 in city areas have been with their provider for a year or less

(Q 37)

What Promoted The Selection Of Fixed Broadband Provider Within Past Year

(Base: All decision makers who Joined New Provider Past 12 Months)

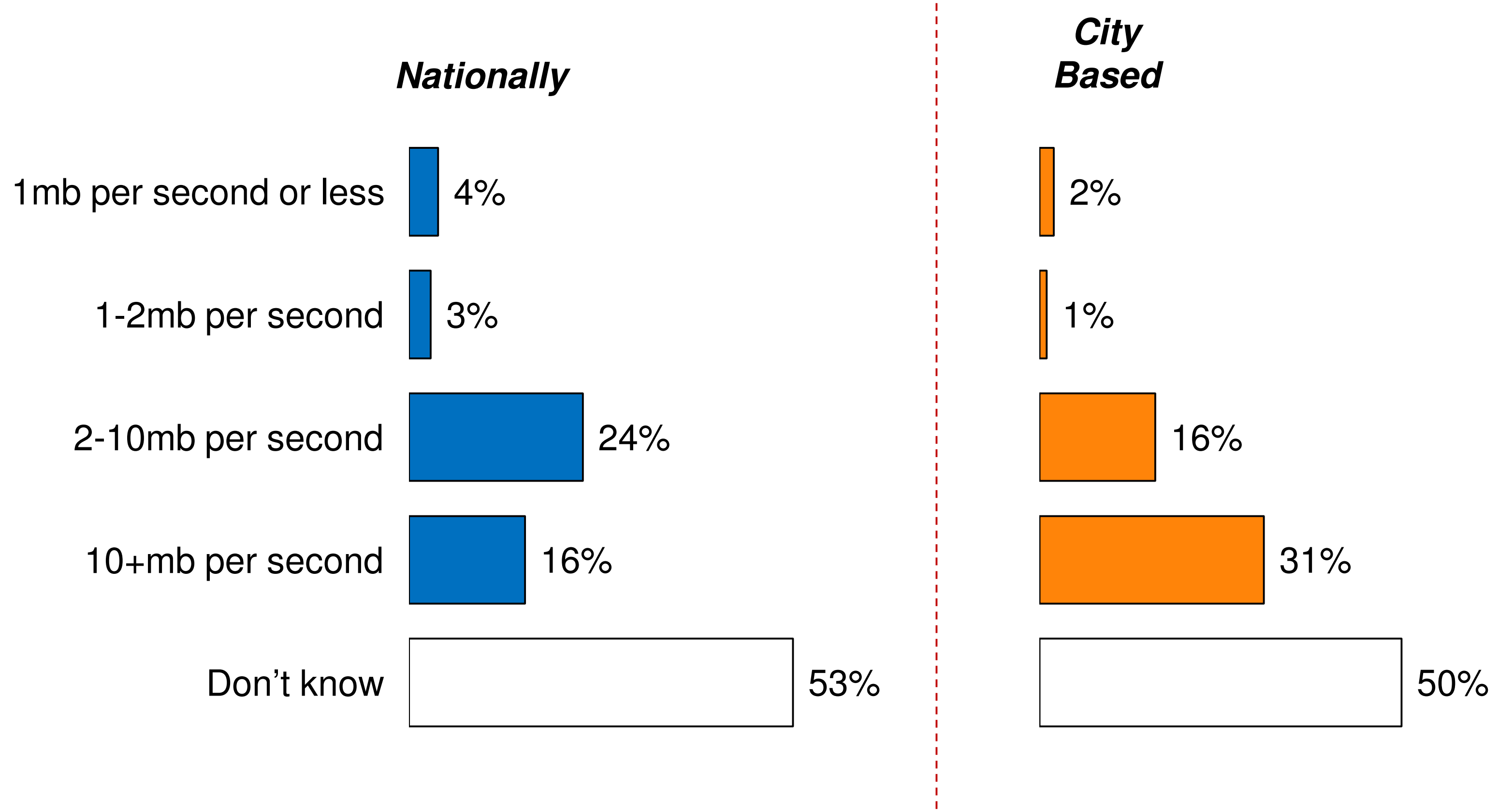


Pricing aspects and bundles are driving movements in the market

(Q 38)

What Is The Download Speed Of Your Fixed Broadband Service?

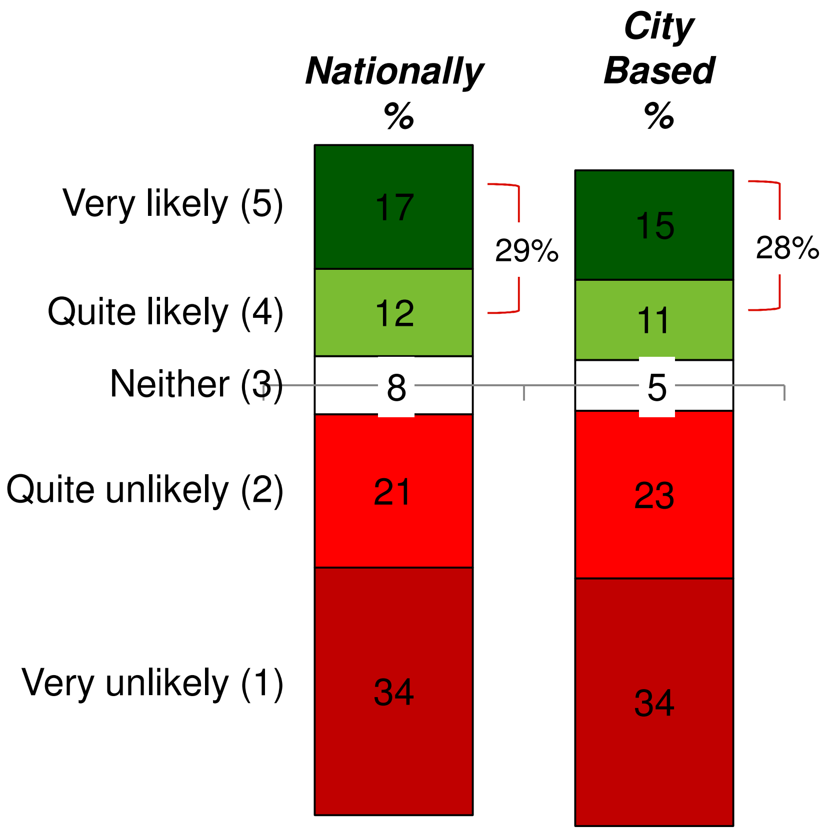
(Base: All decision makers with Fixed Broadband – 659, City Based - 662)



(Q 39)

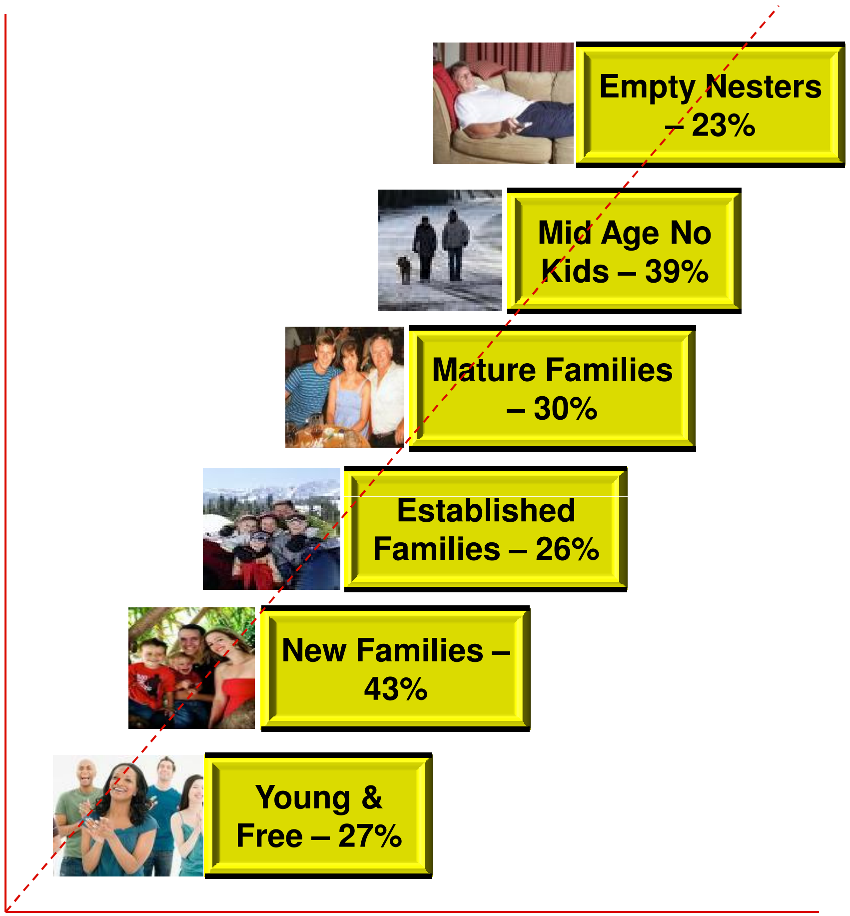
Consideration Of Switching – Next 12 months

(Base: All decision makers with Fixed Broadband – 659, City Based - 662)



	Nationally	City Based
Tied in a contract	8%	9%
Don't Know	1%	1%

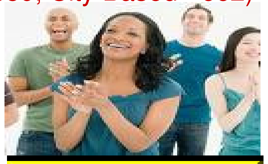
Life stage Consideration To Switch



Over 1 in 4 considering switching fixed provider in next 12 months highest amongst new families

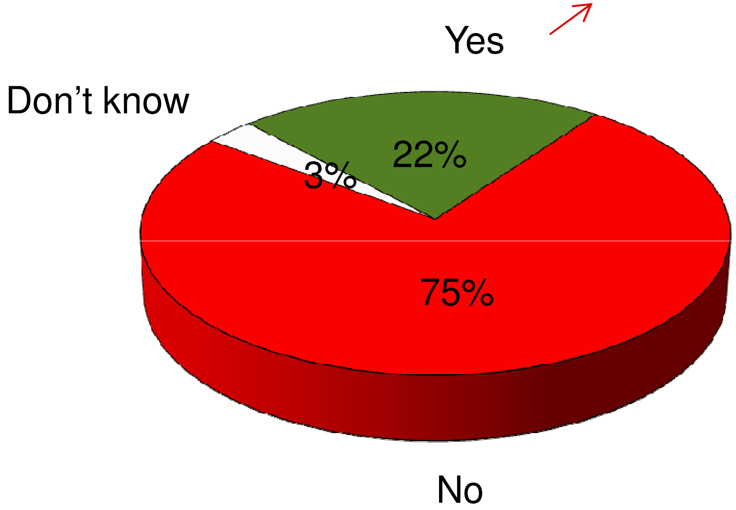
Willingness To Pay More For Higher Speed Fixed Broadband

(Base: All decision makers with Fixed Broadband – 659, City Based - 662)

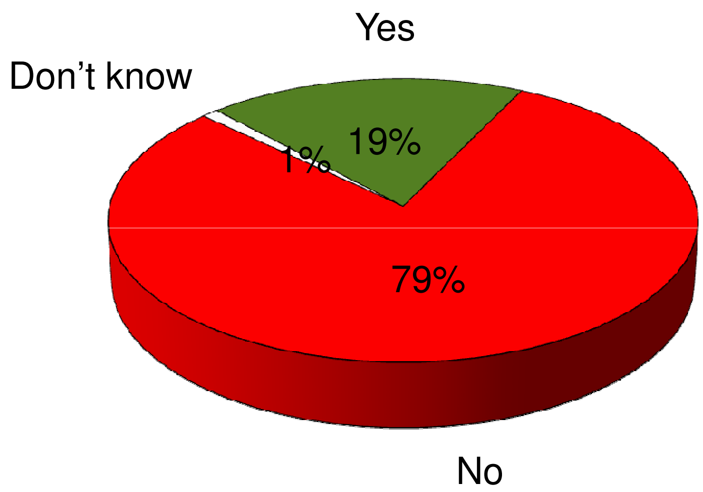


Highest For: Young & Free 37%

Nationally



City Based



	10MB Fixed BB	Less than 10MB+DK
Yes	15	31
No	83	67
Don't know	2	2

	10MB Fixed BB	Less than 10MB+DK
Yes	17	25
No	83	71
Don't know		4

(Q 42)

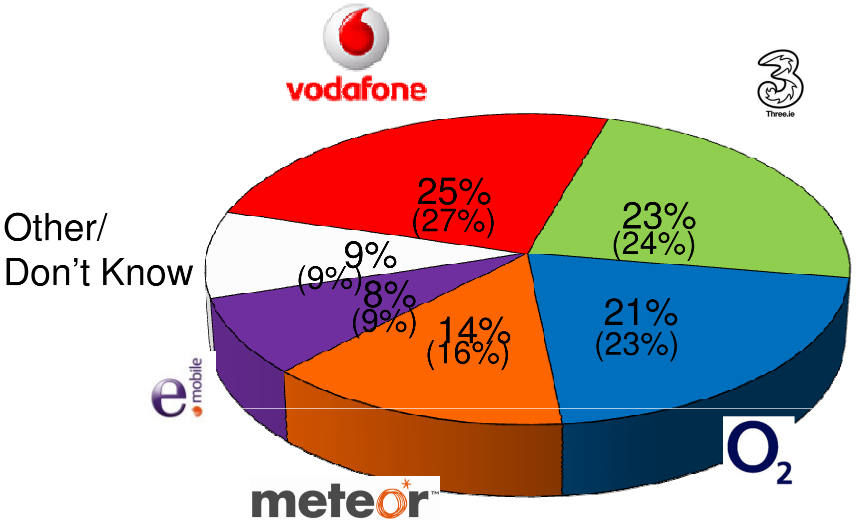
1 in 5 nationally willing to pay more for higher fixed broadband speed – lower in city areas

Mobile Broadband

Main Mobile Broadband Provider

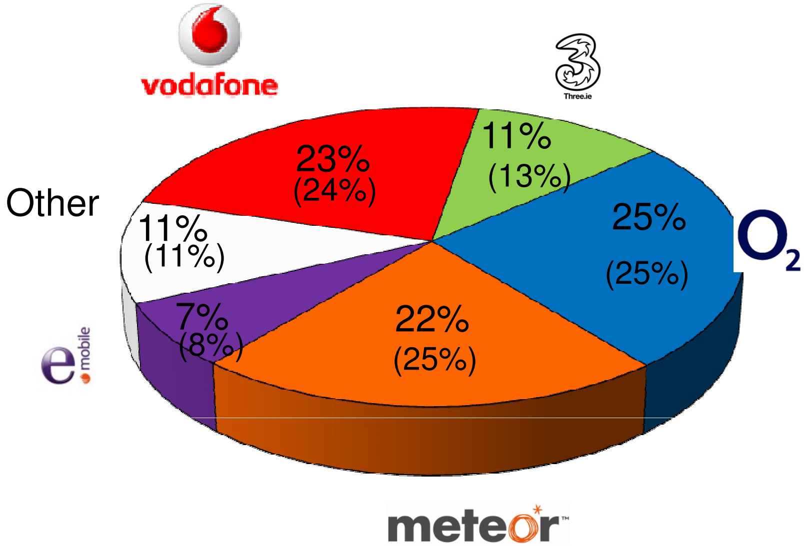
(Base: All decision makers with Mobile Broadband – 217, City Based -157)

Nationally



	Urban	Rural
Vodafone	24	26
3	22	24
O2	18	24
Meteor	16	13
eMobile	8	7

City Based



	Main Provider				
	Vodafone	**O2**	**Meteor**	**3**	**E-mobile**
Dublin	21%	24%	25%	10%	7%

(Q 6a/b)

3 share in city area is lower with Meteor gaining

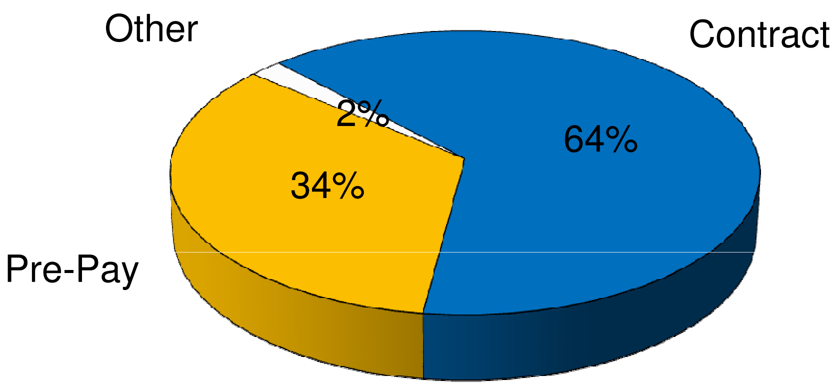
( ) = Any Provider Share

Others: Reach Broadband, Permanent, Wicklow Broadband

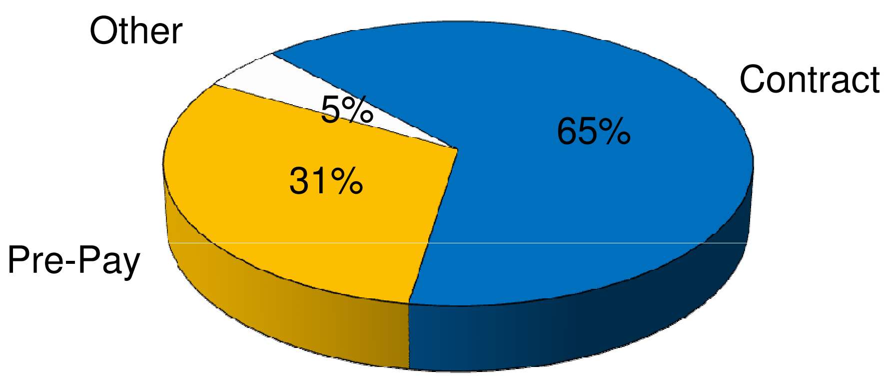
Mobile Broadband Subscription Type

(Base: All decision makers with Mobile Broadband – 217, City Based -157)

Nationally



City Based



1 in 3 nationally and city based on a pre pay arrangement

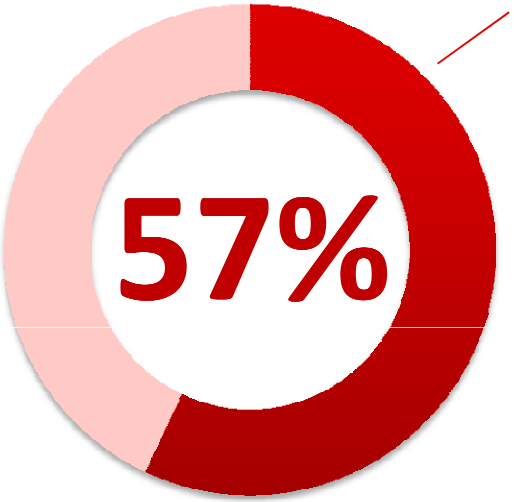
(Q 26)

Satisfaction With Mobile Broadband Service

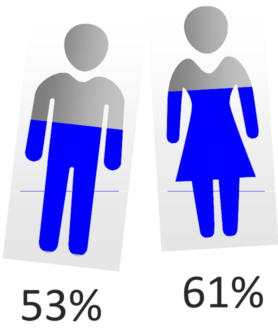
(Base: All decision makers with Mobile Broadband – 217, City Based -157)

Urban: 59%
Rural: 56%

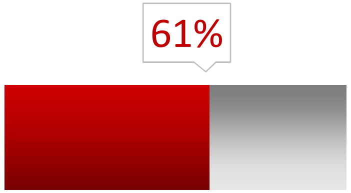
All Adults



Gender



City Based

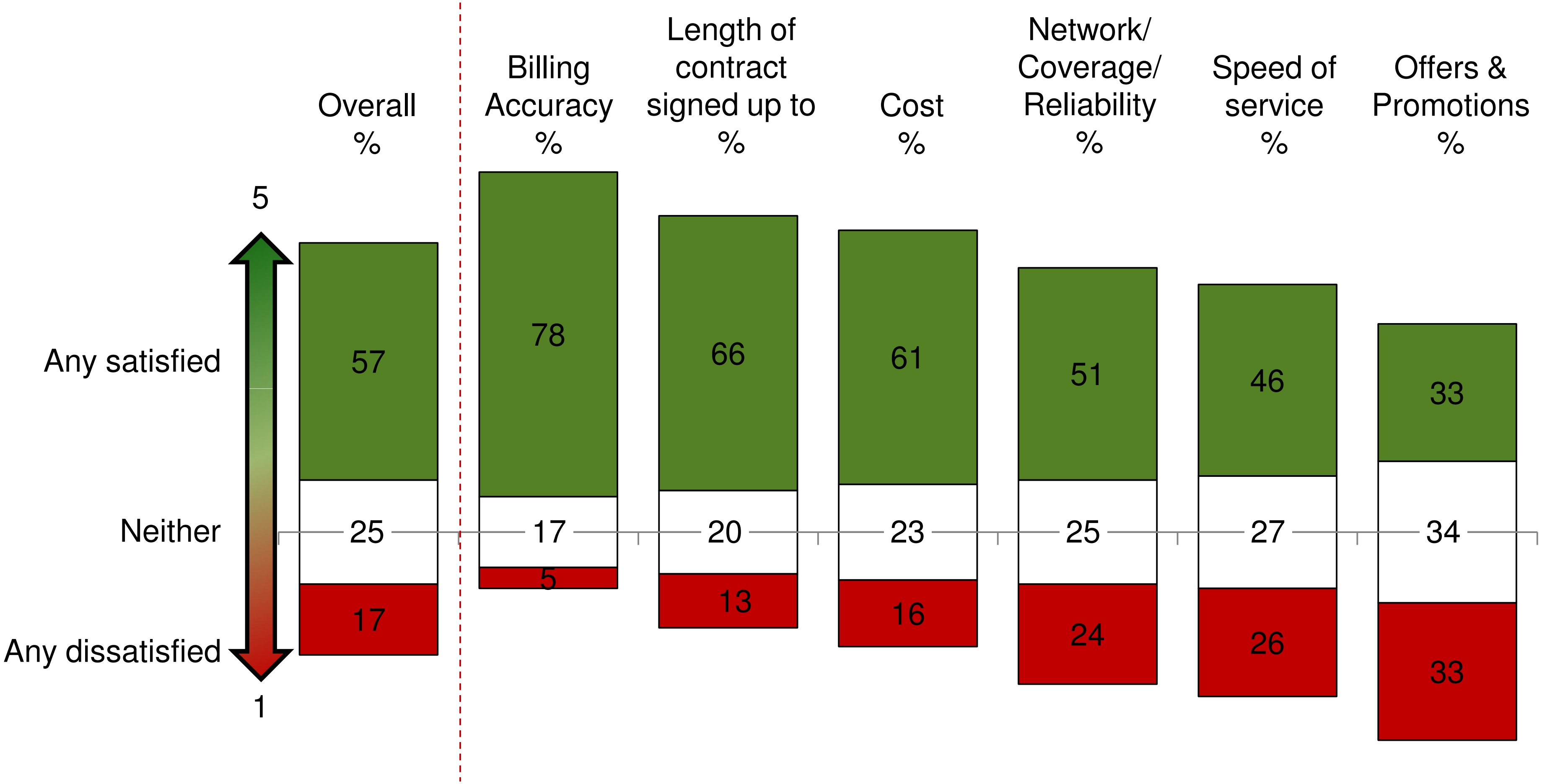


Satisfaction with mobile broadband service is lower than any of the other services used by consumers

(Q 27a)

Satisfaction With Mobile Broadband Service

(Base: All decision makers with Mobile Broadband – 217)



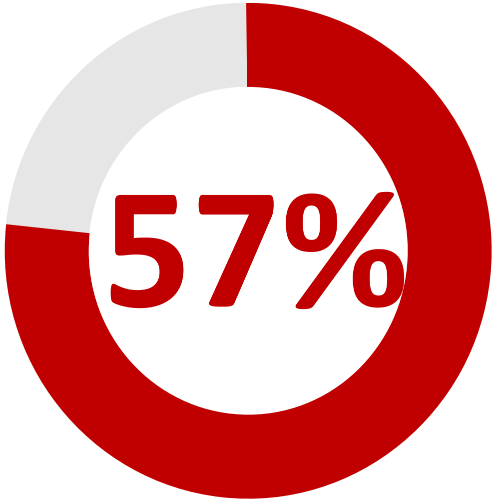
Satisfaction highest on billing accuracy and lowest on speed of service and offers and promotions

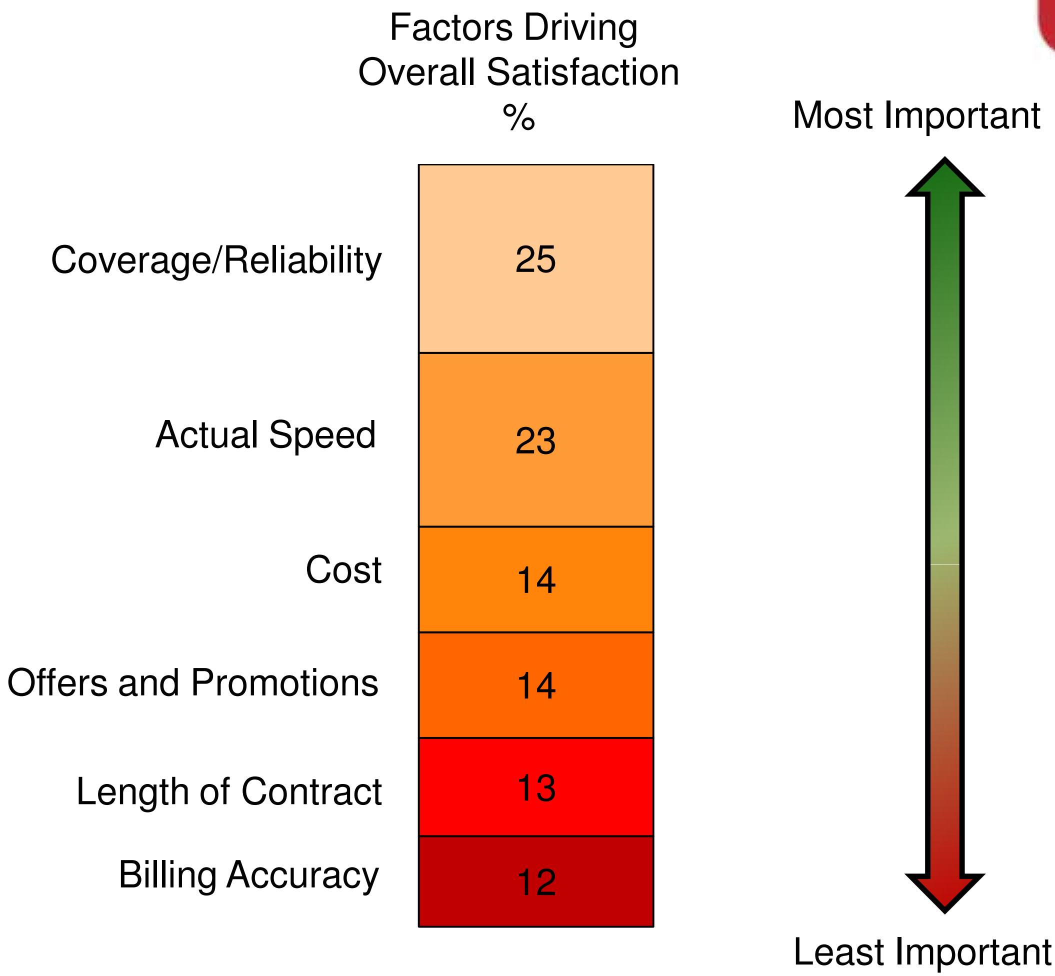
b)

What Aspects Of Service Impact On Overall Satisfaction The Most

(Base: All decision makers with Mobile Broadband – 217)

Overall Satisfaction

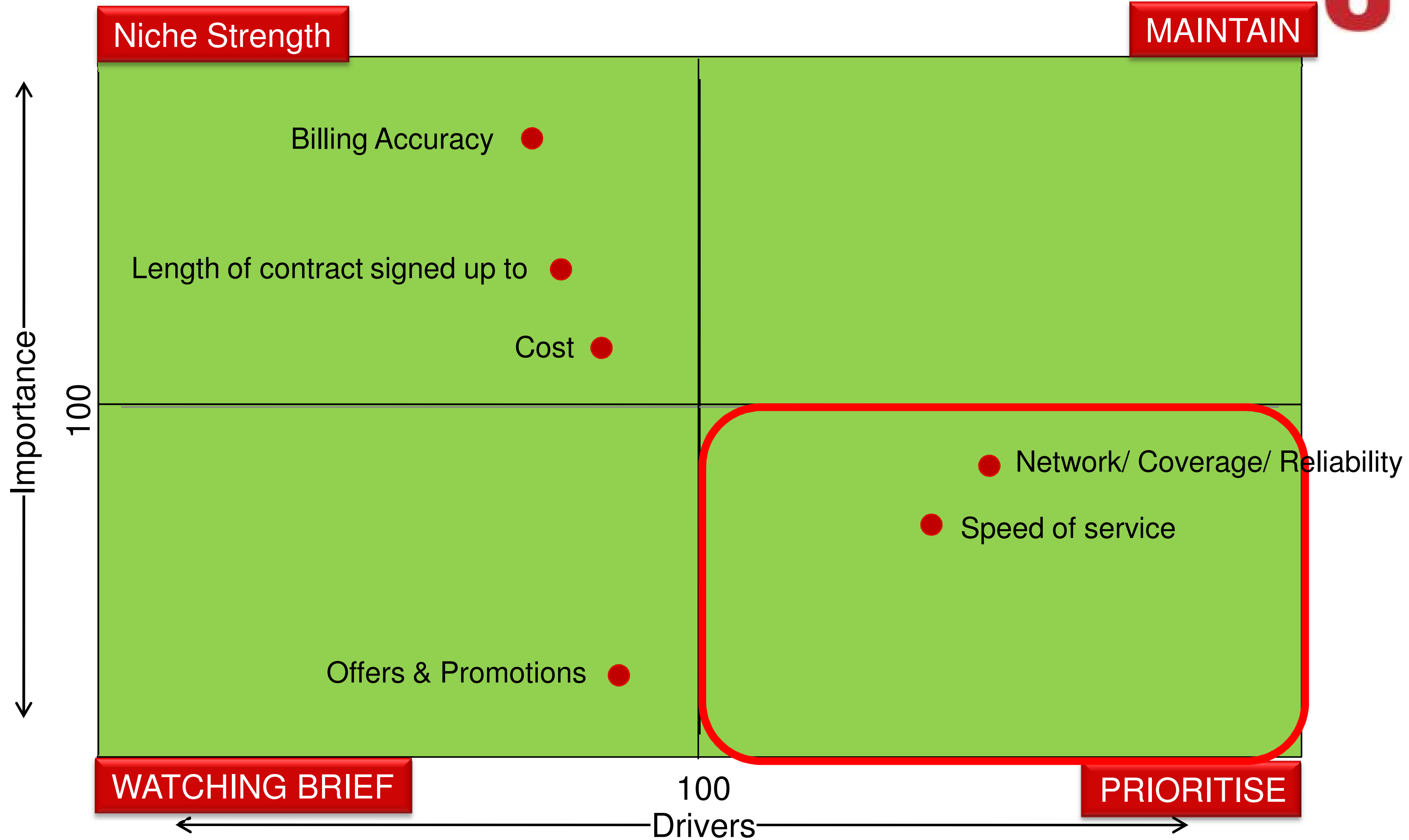




A priority area for improvement is coverage/reliability and speed of service experienced

Identifying The Key Drivers To Overall Satisfaction

(Base: All decision makers with Mobile Broadband – 217)

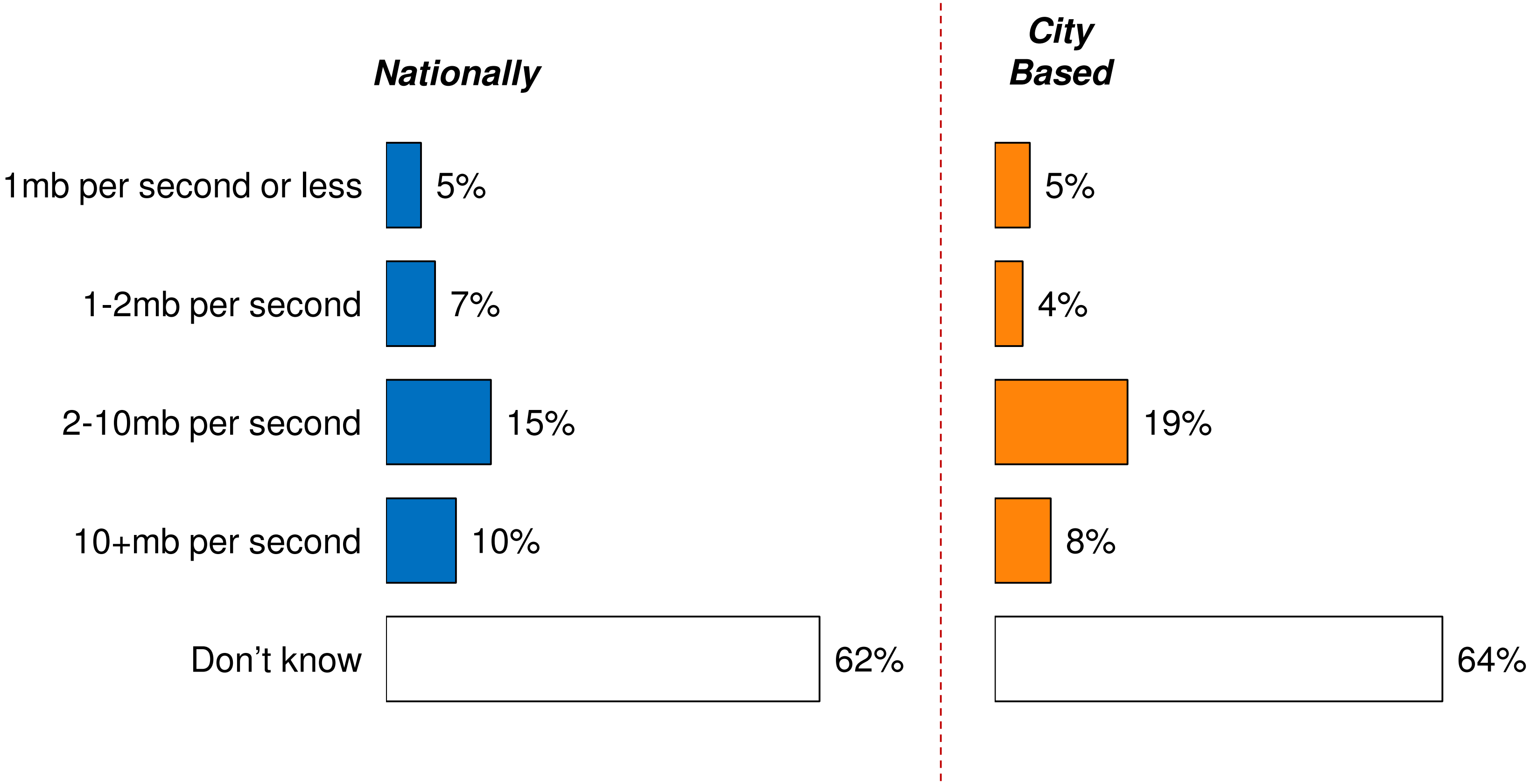


Performance attributes are most important in driving satisfaction and need the most focus

19b)

What Is The Download Speed Of Your Mobile Broadband Service?

(Base: All decision makers with Mobile Broadband – 217, City Based -157)



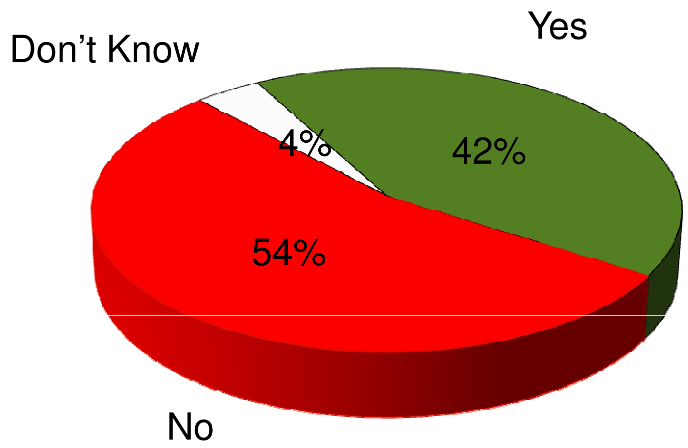
Over 3 in 5 are unaware of the download speed of their mobile broadband service

(Q 28)

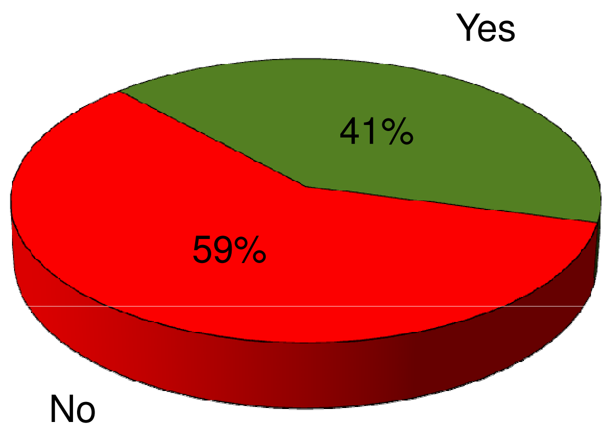
Willingness To Pay More For Higher Speed Mobile Broadband

(Base: All decision makers with Mobile Broadband – 217, City Based -157)

Nationally



City Based

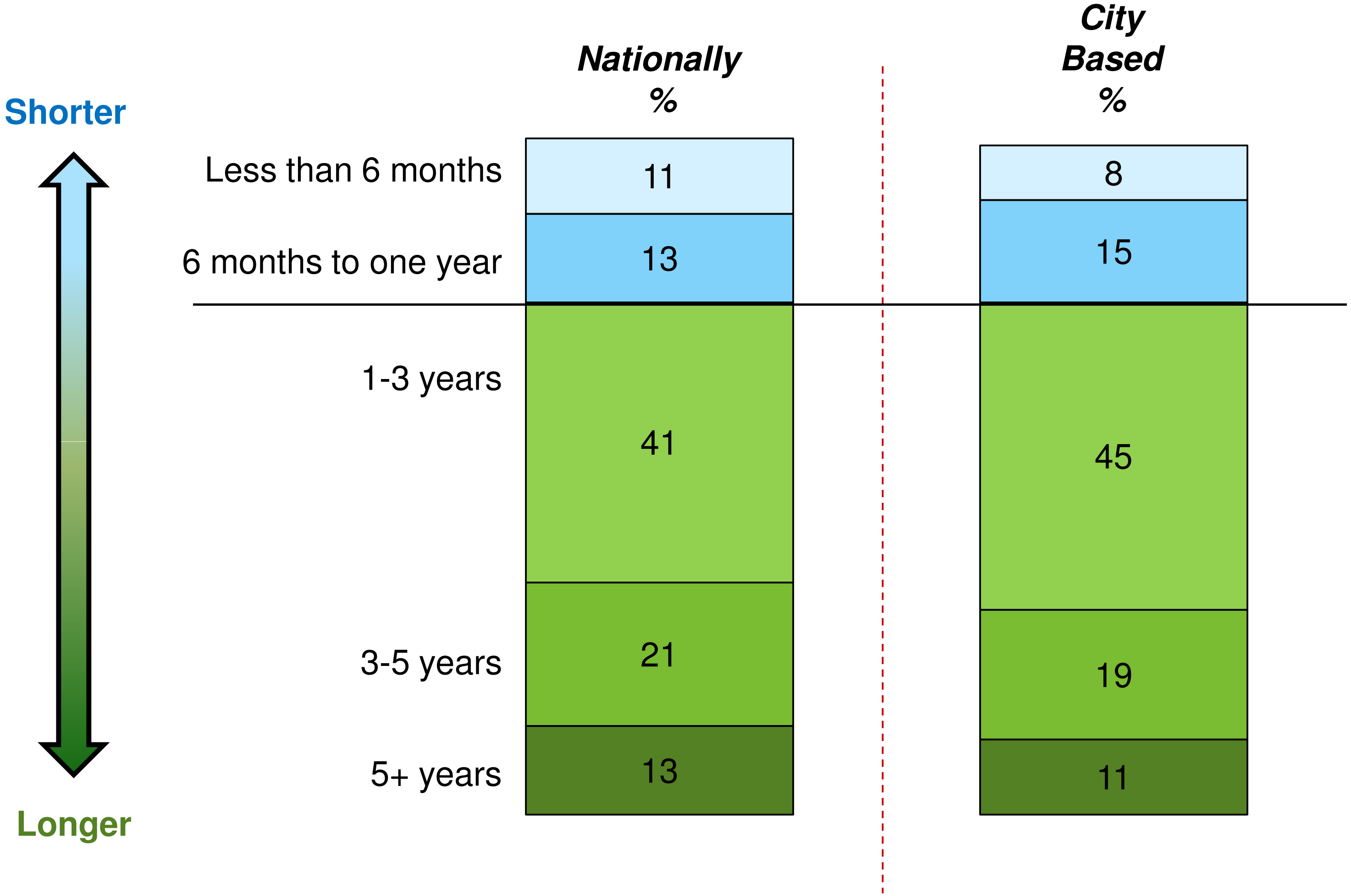


Almost 1 in 2 in the city area say they would be willing to pay more for higher speed mobile broadband

(Q 29)

Length Of Time With Current Provider

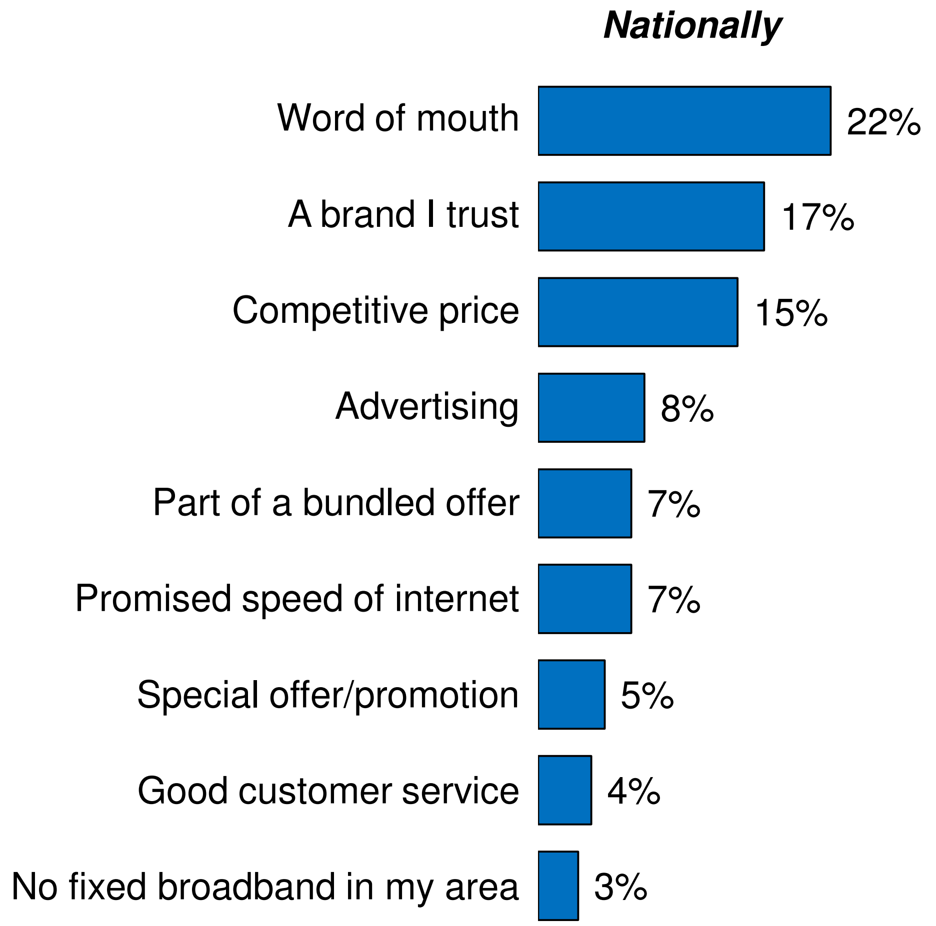
(Base: All decision makers with Mobile Broadband – 217, City Based -157)



Almost 1 in 4 have been with their current mobile broadband provider for less than a year (Q 30)

What Promoted The Selection Of Mobile Broadband Provider Within Past Year

(Base: All decision makers with Mobile Broadband Provider Past 12 Months – 44)

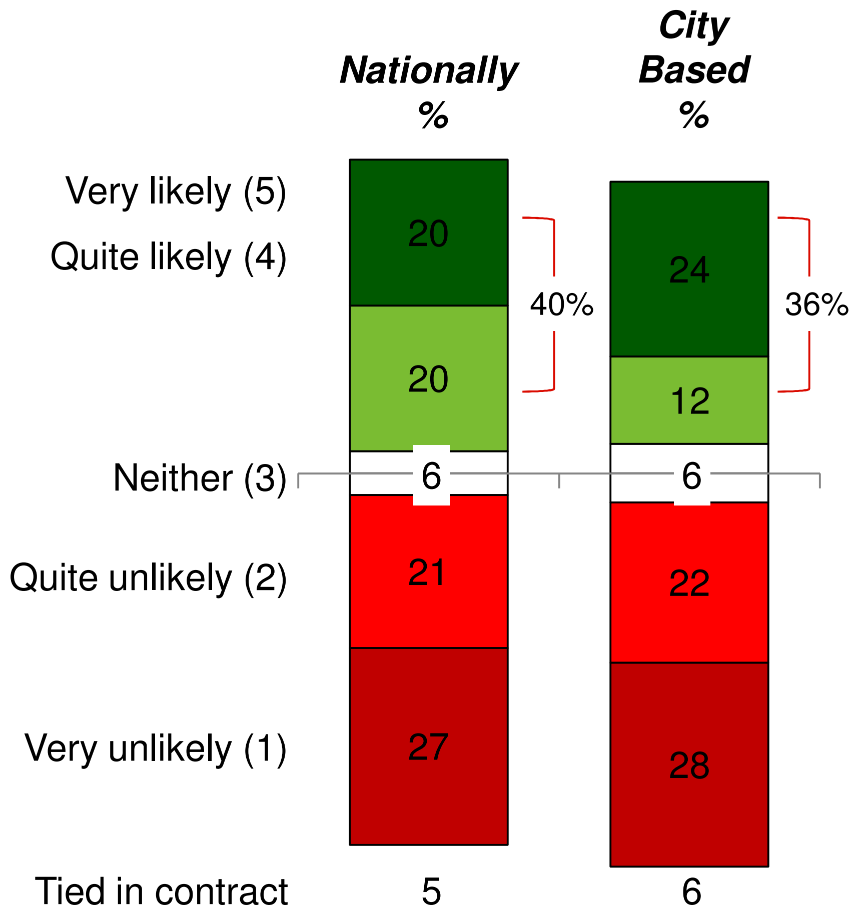


Word and mouth and brand I trust are why most current providers are selected

(Q 31)

Consideration Of Switching – Next 12 Months

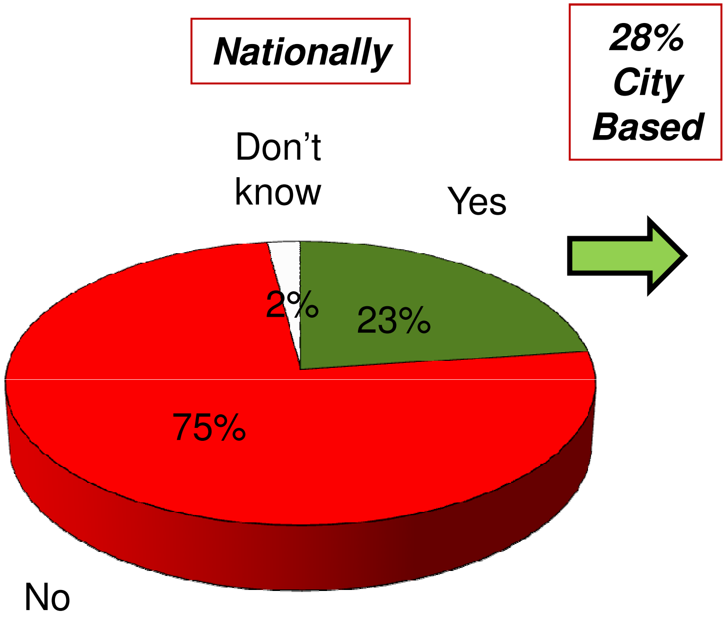
(Base: All decision makers with Mobile Broadband – 217, City Based -157)

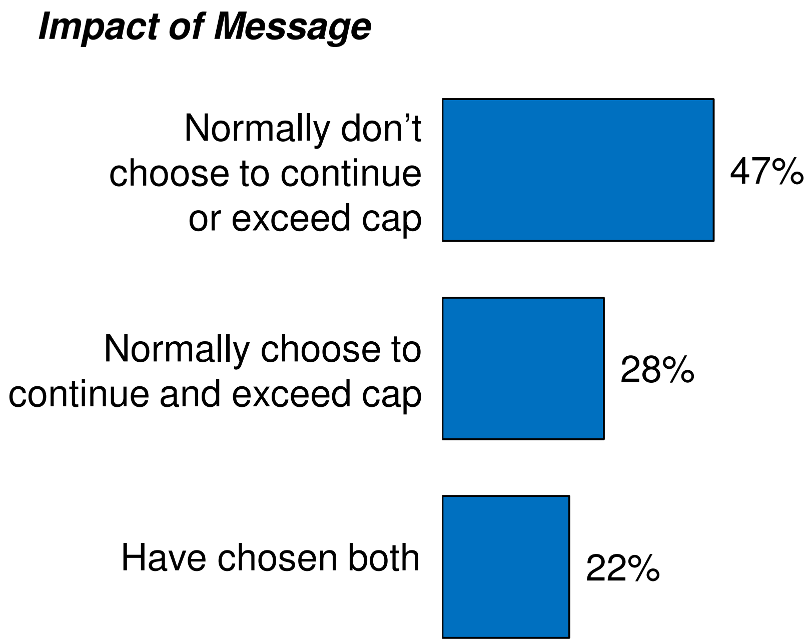


Consideration of switching is high at 2 in 5 of all users planning to switch within the next 12 months

Incidence Of Receiving Text Advising That You Are Close To Data Allowance

(Base: All decision makers with Mobile Broadband – 217, City Based -157)





Just over 1 in 5 have received a text advising that data allowance is nearly reached

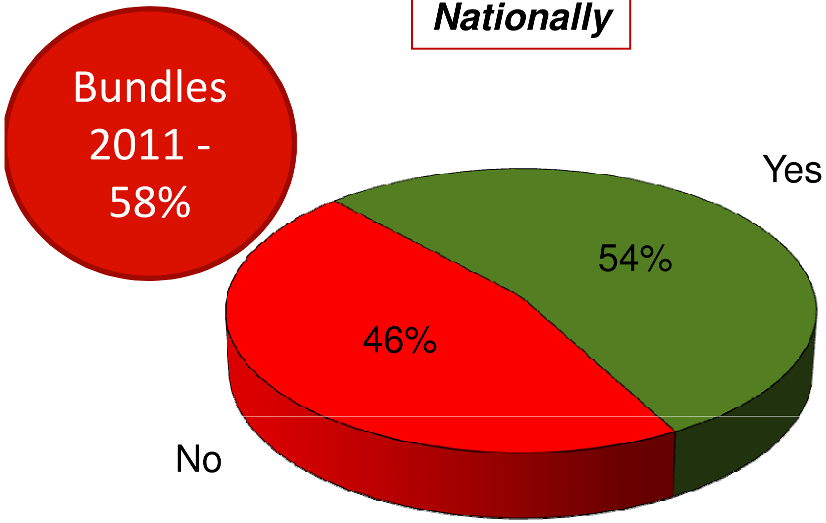
(Q 34/35)

Bundles & Spend

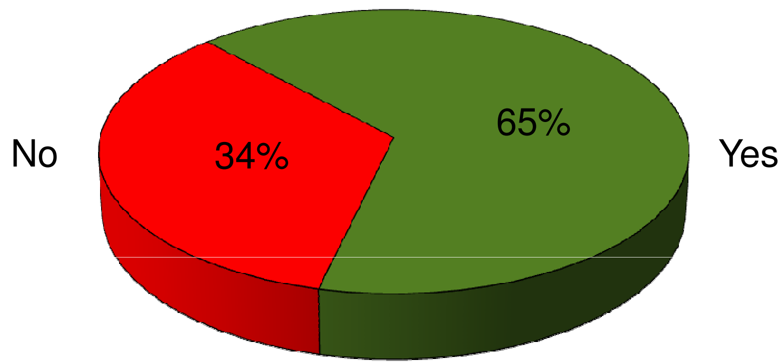
Incidence Of Bundling Any Service

(Base: All Telecommunications Decision Makers – 1,001, 904)

Nationally



City Based

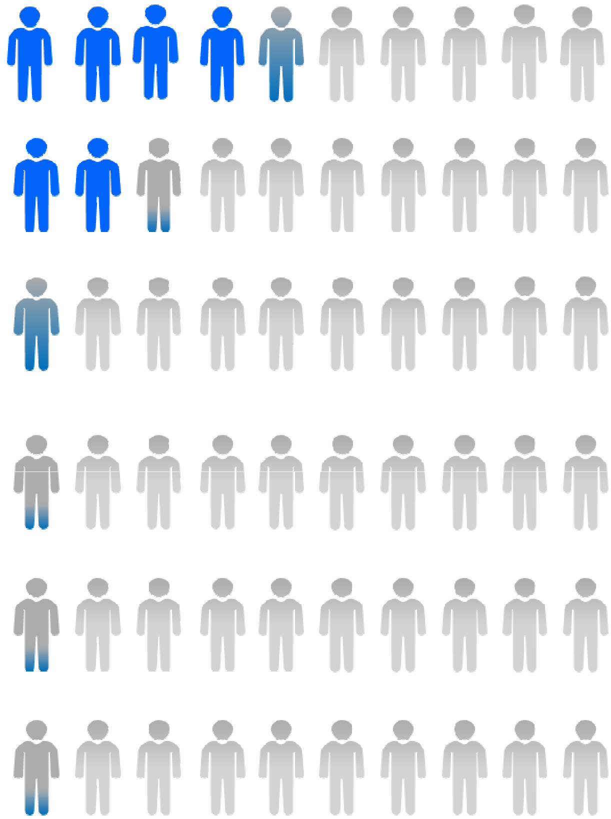


Over half the Irish Population are currently bundling telecommunication services.
Higher in city areas

(Q 9.)

Most Popular Bundles Held

(Base: All decision makers with Bundle Service – 544,589)



	National	City Based
Landline & Fixed Broadband	57%	43%
Landline & Fixed Broadband & TV	16%	26%
Fixed Broadband & TV	6%	14%
Landline & TV	2%	4%
Landline & Mobile Phone	2%	2%
Landline Mobile Phone & Fixed Broadband	2%	-%

Landline and Fixed Broadband the most popular bundle held with Fixed Broadband and TV Significantly more popular in city areas

Average Spend Per Month On Main Service Holding – Bundle + Non Bundle Responses

(Base: All decision makers with Bundle Service – 519)

	National
Landline & Fixed Broadband & TV	€92
Fixed Broadband & TV	€72
Landline & TV	€71
Landline, Mobile Phone and Fixed Broadband	€71
Landline & Fixed Broadband	€57
Landline & Mobile Phone	€47
Landline only	€49 (€51)
Mobile Phone only	€37 (€32)
Mobile Broadband	€24
Fixed Broadband	€37

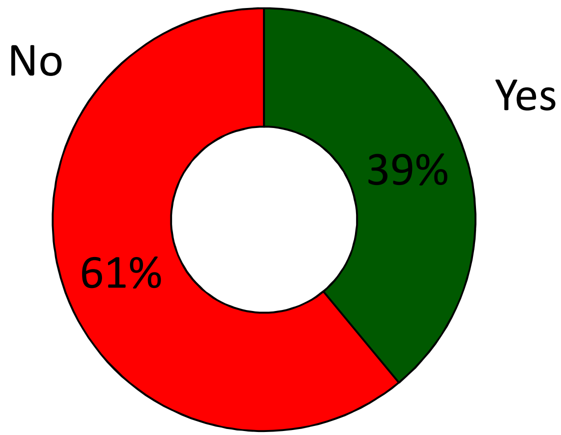
Bundles with TV included generally involve a higher spend per month

( ) – 2011 data

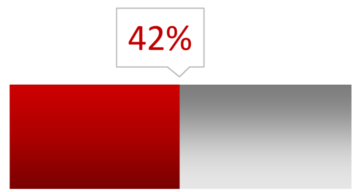
ComReg Section

Have You Heard Of An Organisation Called ComReg

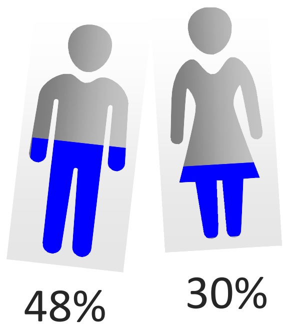
(Base: All Telecommunications Decision Makers 15+ – 1,001, City Based - 904)

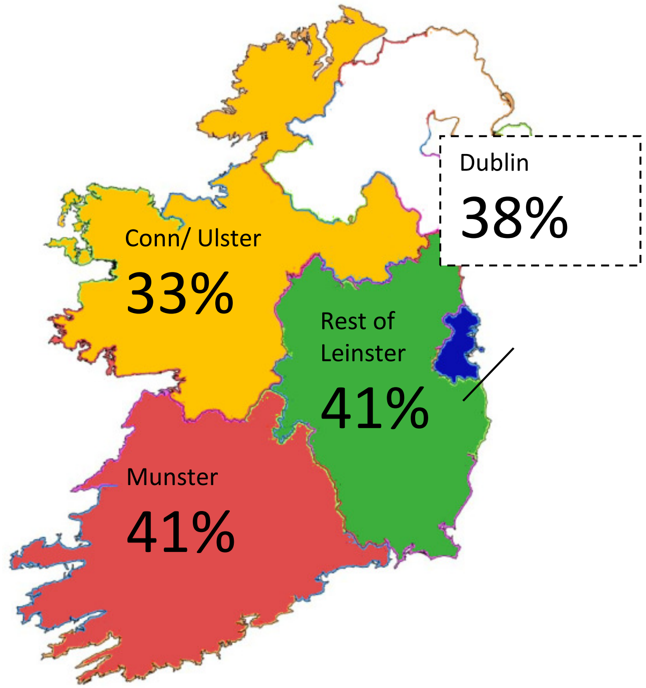


City Based



Gender



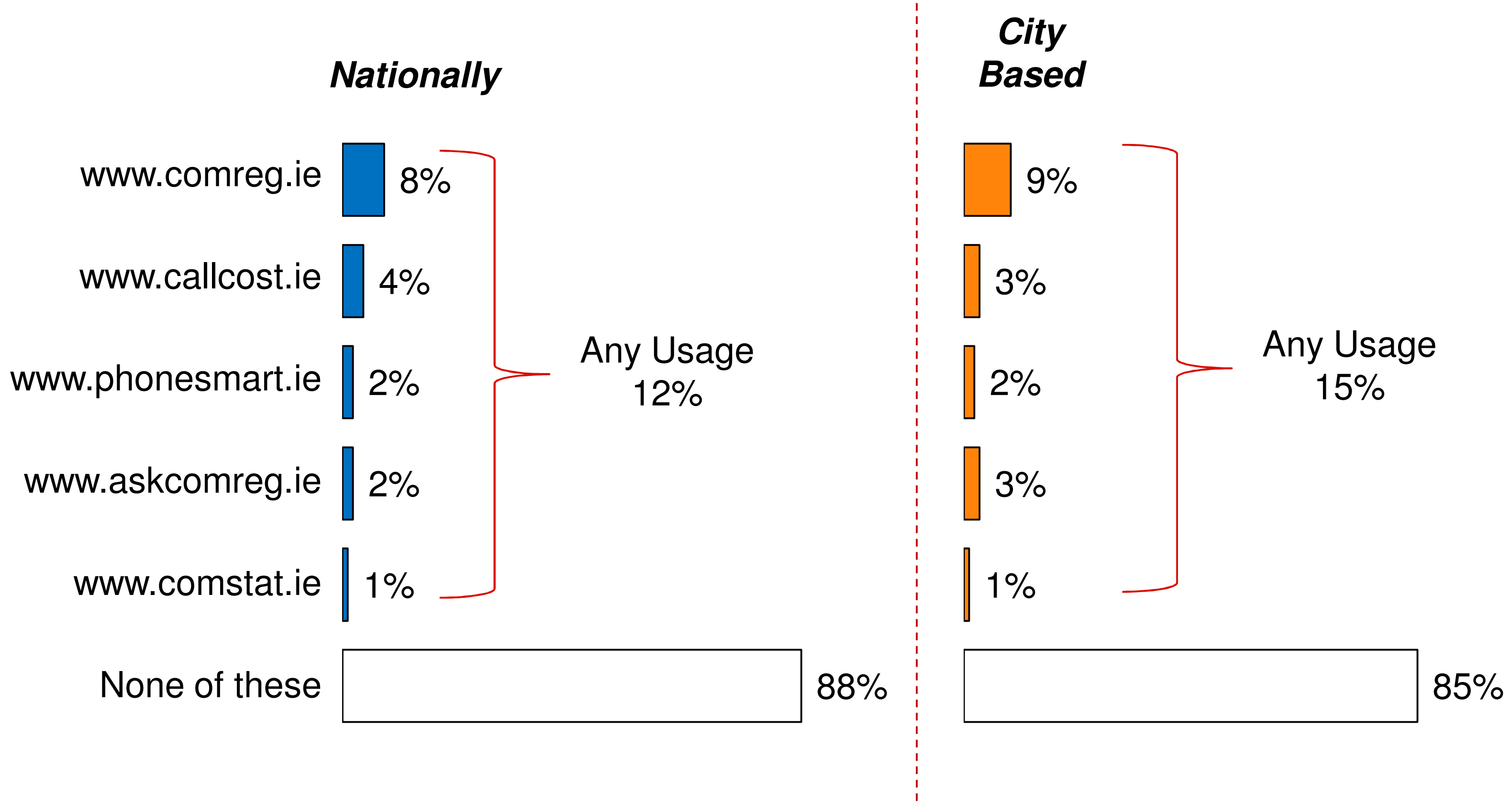


Almost 2 in 5 aware of ComReg when prompted. Awareness highest in Rest of Leinster and Munster and within the city sample

(Q 43)

Ever Used Any Of The Following Websites

(Base: All Telecommunications Decision Makers 15+ – 1,001, City Based - 904)

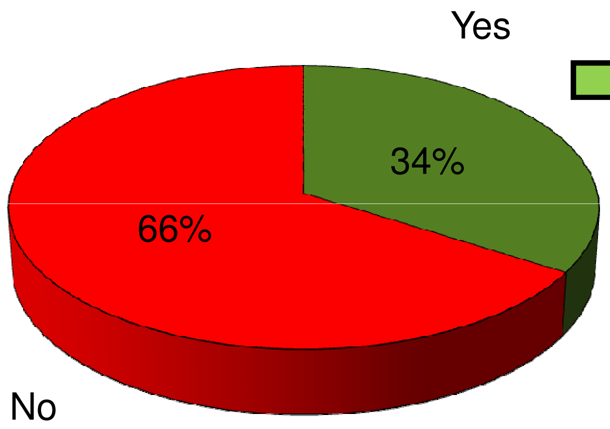


ComReg's main site is most likely to be used with city based residents most likely to use *(Q 44)*

Have You Ever Received A Bill Or Paid More For Telecommunication Service than Expected

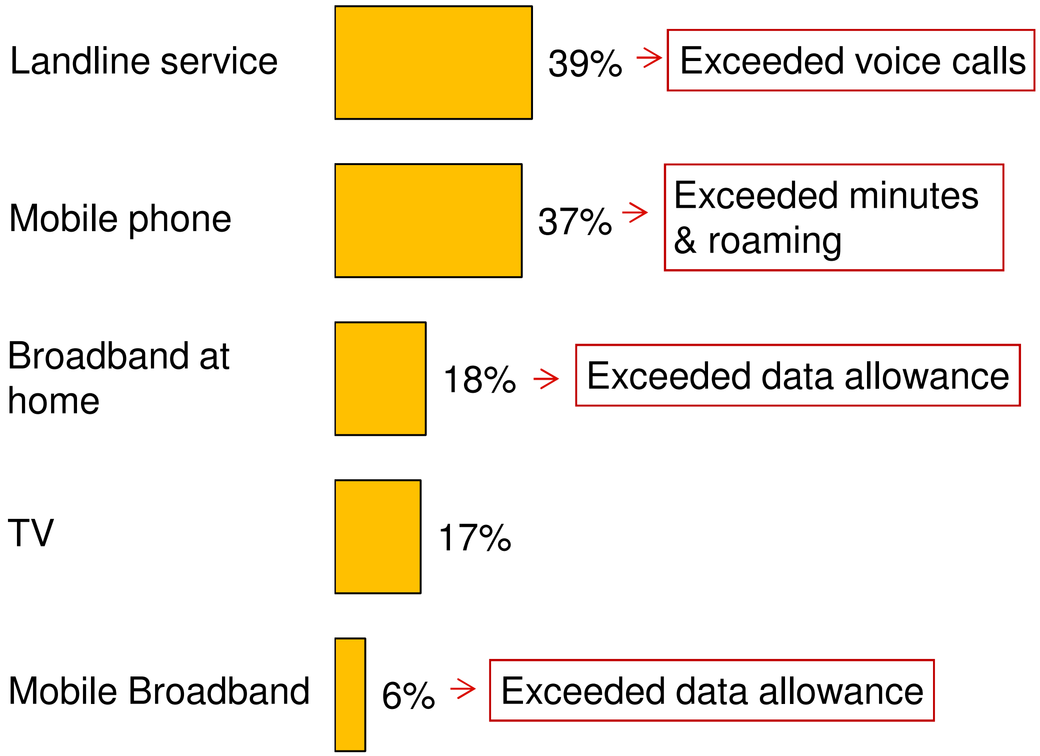
(Base: All Telecommunications Decision Makers 15+ – 1,001, City Based - 904)

Nationally



36%
City Based

What service? ***Why?***



Over 1 in 3 have received a bill or paid more for service than expected

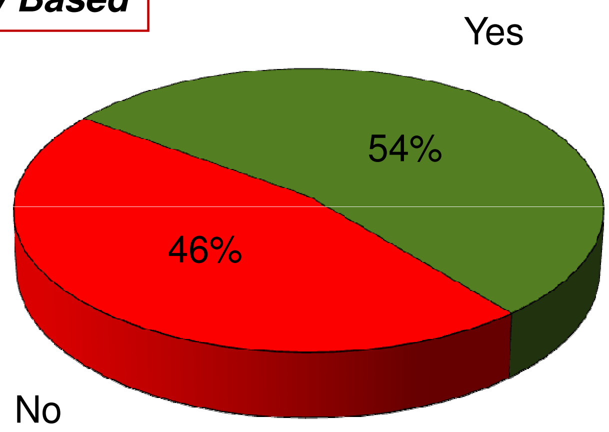
(Q 45-47)

Incidence Of Contacting Customer Service Department Of Telecoms Provide – Past 12 Months

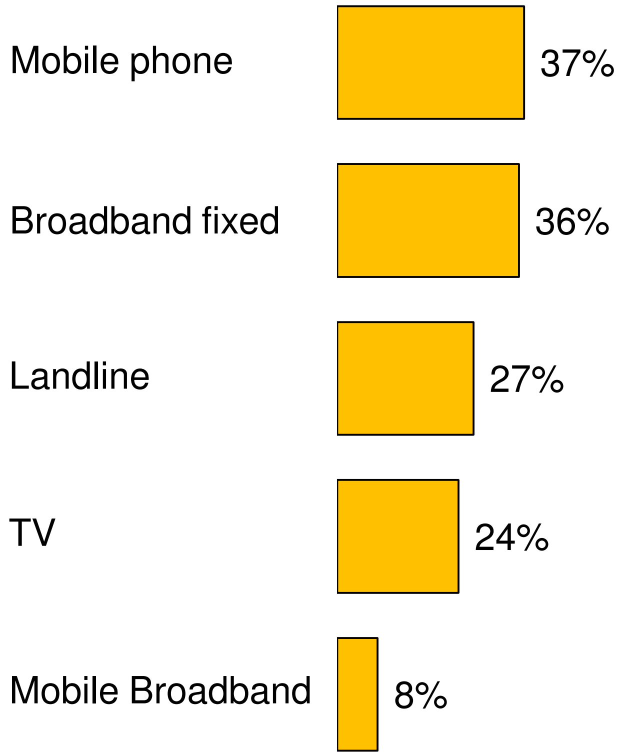
(Base: All Telecommunications Decision Makers 15+ – 1,001 City Based - 904)

Nationally

60% City Based



What service?



Over half the population have called a customer service department within the past 12 months

Social Protection

(Base: All Telecommunications Decision Makers 15+ – 1,001 City Based - 904)

	Landline	Mobile Phone	Fixed Broadband	Mobile Broadband
Usage	85% (69%)	93% (97%)	54% (66%)	10% (22%)
Satisfaction	87% (77%)	77% (76%)	71% (69%)	Base is too small to break out.
Providers	Eircom:64% (56%) UPC: 9% (18%) Vodafone:13% (16%)	Vodafone:42% (40%) O2: 30% (27%) Meteor: 16% (20%) 3: 2% (6%) eMobile: 4% (3%)	Eircom: 47% (39%) UPC: 14% (25%) Vodafone: 22% (17%)	
Likely to Switch	13% Versus total 26% 73% with provider 5+ Years (52%)	14% Versus total 19%	22% Versus total 29%	

National figures in brackets

Key Insights

1. Broadband at home access has stayed at the same rate since 2011 at 78% of the decision maker population. The majority of those without access do not want broadband at home but 2 in 5 are not using for a variety of issues such as access problems and cost. Smartphone internet access is also used as an alternative. Young and Free households are least likely to have a landline and most likely to have mobile broadband.

2. Satisfaction with mobile broadband service is considerably lower than among fixed or any other telecommunications service. In order to improve satisfaction in this area network operators need to improve network coverage/reliability and speed of service. Over 2 in 5 mobile broadband decision makers state that they are willing to pay more for higher speeds. As a result of the current low satisfaction levels intention to switch in this market is high.

3. Fixed broadband reports higher satisfaction levels than mobile broadband however is low for the New Family segment who have the highest likelihood of switching provider. Speed of service is the main focus for network operators to improve satisfaction, while competitive price is the main driver of changing provider in this market. Fewer decision makers are willing to pay more to ensure faster speeds than we witnessed in mobile broadband.

4. The mobile market continues to increase its share of contracts v prepay with contract now in excess of 2 in 5 mobile decision makers. Satisfaction with mobile phone service is high, with lowest intention of switching, however network providers need to focus on cost and improving the quality of internet coverage on handsets. Smartphone ownership has remained static from 2011 – 4 in 5 in the young and free segment are Smartphone owners.

Key Insights

5

Eircom continue to dominate the landline market yet have less presence in city areas and have the same share as UPC in Dublin. The Young and Free segment show lower satisfaction for landline service and have a higher intention to switch. This group are more likely than others to use their landline service to assess broadband services. While satisfaction network operators need to focus on cost and contract lengths in order to improve customer satisfaction further.

6

Almost half of those in the city sample have heard of ComReg when prompted however usage of the main ComReg site is relatively low at 12%. The city sample have a higher incidence of being overcharged and calling customer service departments of telecoms providers in the past 12 months.

7

The incidence of bundling telecoms service remains unchanged over time at 54% and is higher in city areas – perhaps driven by wider availability of TV and broadband providers in these areas. Landline with fixed broadband is the most popular bundle type.