



Ireland: consumer survey



Tom Rebbeck

About this report

This report provides key findings from consumer survey data from Ireland and gives an analysis at the operator level. It covers fixed broadband, mobile and pay-TV services.

The survey was conducted in association with Dynata between July and August 2022. The survey group was chosen to be representative of the mobile-internet-using population in Ireland. We set quotas on age, gender and geographical spread to that effect. There were at least 1000 respondents.



GEOGRAPHICAL COVERAGE

- Ireland



KEY QUESTIONS ANSWERED IN THIS REPORT

- What are the most significant factors that affect Net Promoter Scores (NPSs) for fixed broadband and mobile operators? Which operators score highly and why?
- What are the most significant drivers of fixed broadband and mobile churn and how can operators approach customer retention?
- What are the mobile and fixed broadband data usage patterns among respondents?
- What are the most popular pay-TV and streaming video services? Which services lead to high satisfaction scores and why?



WHO SHOULD READ THIS REPORT

- Strategy, marketing intelligence and planning teams within telecoms operators.
- Other parties interested in the relative performance of telecoms operators in Ireland (for example, regulators and vendors).

Executive summary

eir has the lowest NPS in both the fixed and mobile markets. Vodafone has the highest NPS in the fixed market and is the best-performing main-brand MNO, but sub-brands Tesco Mobile and GoMo both have higher scores.

There is some scope for operators to grow their revenue by cross-selling services and upgrading customers to faster connections (for fixed services) or larger data allowances (for mobile services).

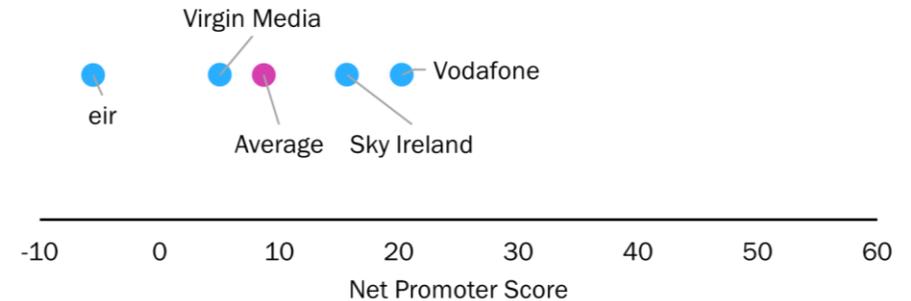
Operators in Ireland can also learn from their sister companies in other countries. For example, Vodafone UK does a better job of cross-selling services than the Irish division. eir should adopt some of the strategies that have been successful for its sub-brand GoMo.



KEY FINDINGS

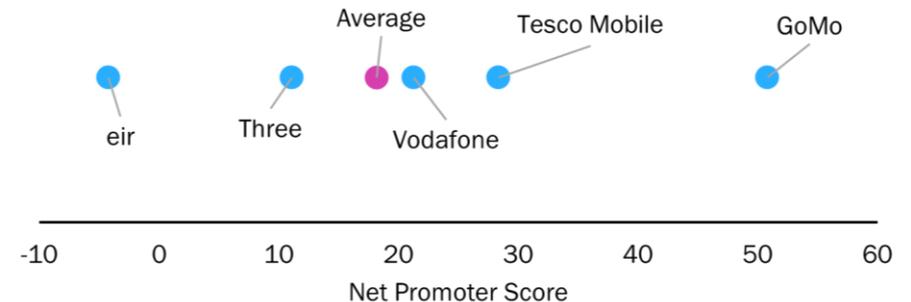
- Fixed operators should look to migrate customers to faster speeds and should cross-sell other products.
- GoMo's low-cost, large data allowances have put pressure on other operators; they should consider how to improve their satisfaction scores for aspects other than price.
- Netflix leads the TV and video market in terms of both penetration and satisfaction, but its lead is far from unassailable.

Figure 1: Net Promoter Scores for fixed broadband operators, Ireland, 2022¹



Source: Analysys Mason

Figure 2: Net Promoter Scores for mobile operators, Ireland, 2022¹



Source: Analysys Mason

¹ Net Promoter Score (NPS) is calculated by subtracting the percentage of subscribers that rated the operator 6 or below from the percentage that rated it 9 or 10. Please refer to the methodology and panel information section for the sample size and relevant survey questions.



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About the author



Tom Rebbeck (Partner) leads Analysys Mason's *Operator Business Services and IoT* research practice drawing on more than 20 years of experience in the telecoms sector. He is based in our London office, but works for clients worldwide. Tom is a specialist on the Internet of Things (IoT) and other enterprise services and has written widely on the role for operators as telecoms markets develop. As well as published research, he has worked on projects for a range of clients – including operators, regulators, industry bodies and vendors. Many of these projects have been supported by original research, such as expert interviews and customer surveys.

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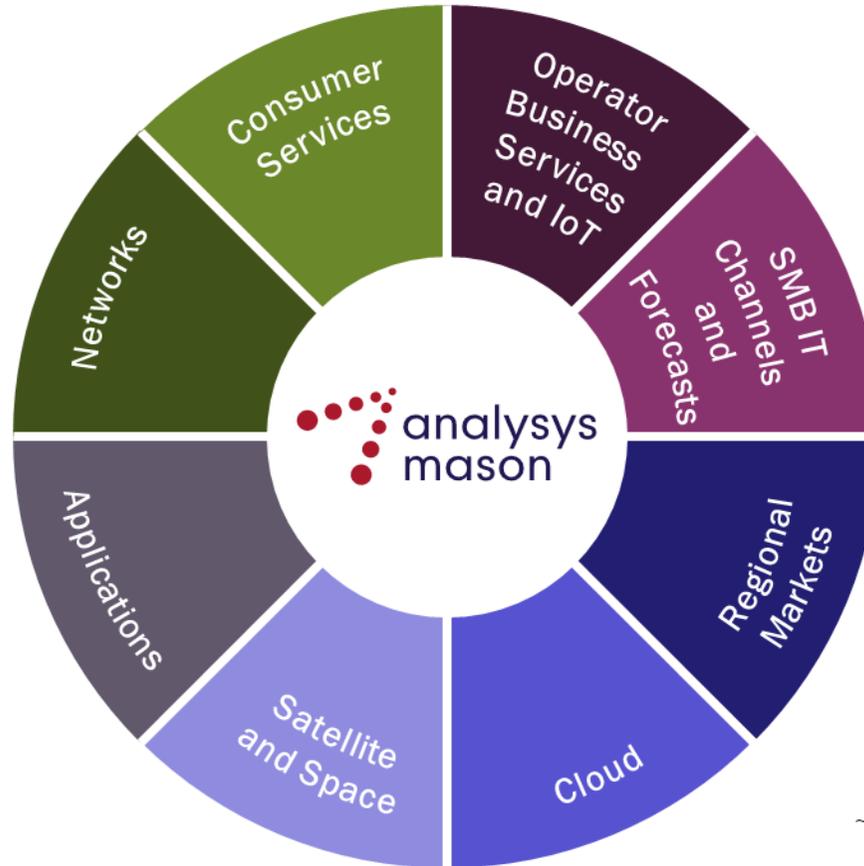
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 - Asia-Pacific
 - Middle East and Africa
 - European Core Forecasts
 - European Telecoms Market Matrix
 - European Country Reports
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DataHub
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 - Operator historical data

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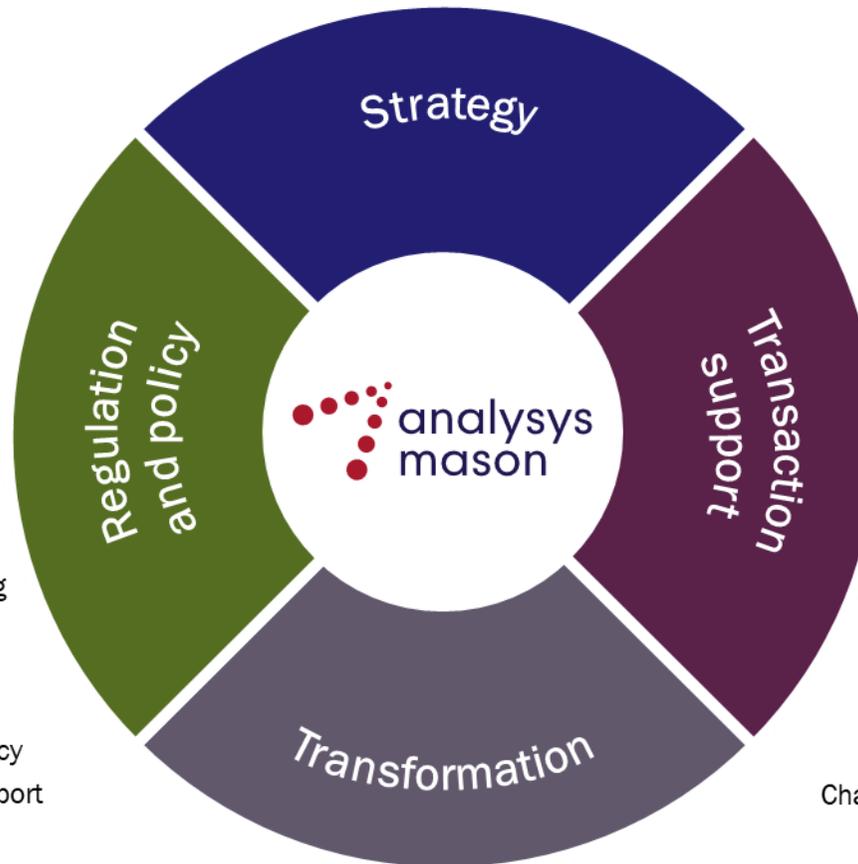
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- Corporate growth strategy
- Business unit strategy
- Infrastructure strategy



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- Accelerating digital transformation of society
- Price controls and cost modelling
- Regulatory accounting
- Regulatory benchmarking and analysis
- Spectrum management and policy
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