

eircom Household Sentiment Survey

Phase IV - March 2014



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Introduction

Welcome to the fourth eircom Household Sentiment Survey (eHSS), the definitive behavioural barometer of technology usage in everyday Irish life. Commissioned by eircom, Ireland's largest telecommunications provider, the bi-annual survey is conducted by Behaviour & Attitudes and is taken across 1,000 Irish households. This survey continues to record and analyse the social changes experienced in Ireland as a result of technology and innovation.

Amongst the wide-ranging findings from the latest eircom Household Sentiment Survey (eHSS), is how technology impacts on family life – from parents oversharing online to the influence of children on tech purchases.

The report also reveals how digital commuters are changing and becoming more sociable online as our technology evolves.

We compare how quickly the technology landscape is changing, evidenced by the surge in tablet ownership and the rise and fall of new and old social media. As technology becomes ever more integral to our lives, the eircom Household Sentiment Survey provides a unique insight into the impact on Irish society.

The full report will be available online at www.eircom.net/pressroom from 9am Monday 24th March 2014.



1 Key Themes

Surge in on-the-go device access continues





86%

86% of adults now have access to a potential online device which can be used on-the-go. A significant increase from 80% in Feb '13.

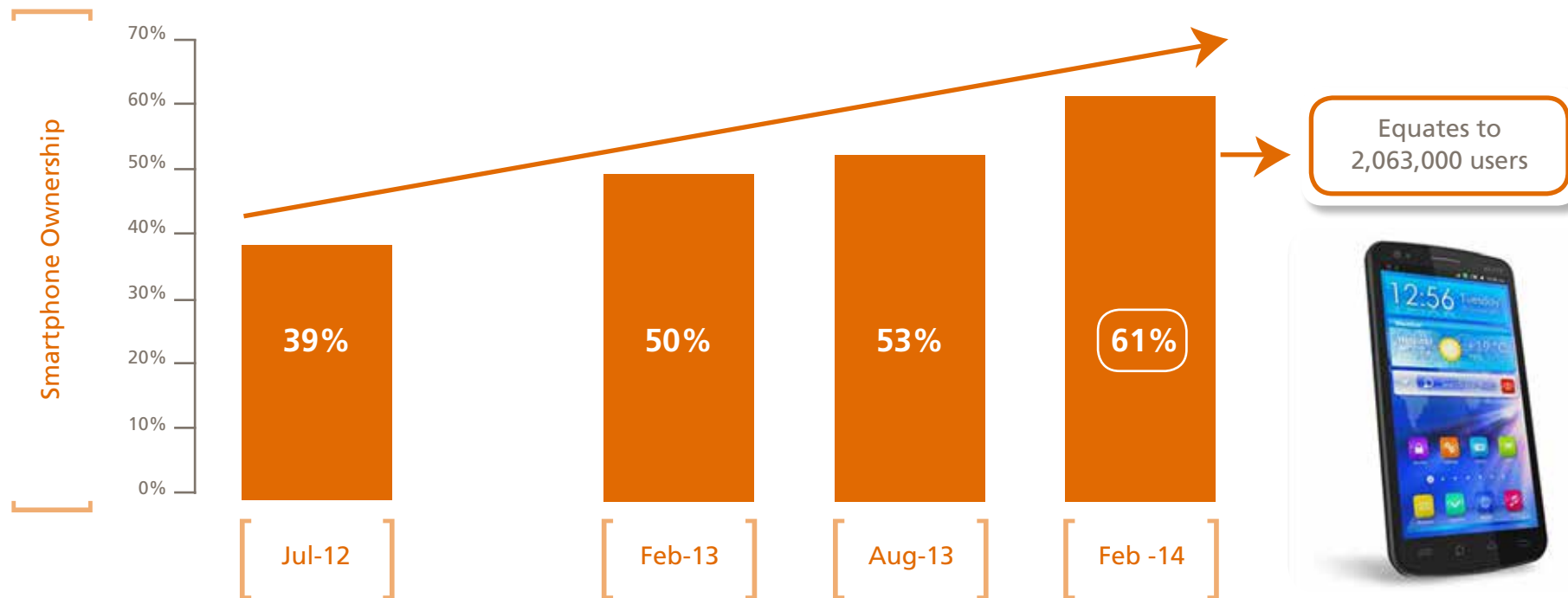
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The average number of potential online on-the-go devices in the home increases to 4 from 3 in February 2013 (The average is 6 for 16-24s)



Smartphone ownership continues to grow

Base: All with mobile



Question

Which of the following types of mobile phone handsets is your main one? A smartphone is a device that lets you not only make telephone calls and send texts, but also has features that you might find on a computer such as the ability to send and receive e-mail, edit office documents, download apps, take and edit photos, get driving directions via GPS, create a playlist of digital tunes etc

Access to tablets continuing to grow!



Aug 2013

25% had access to a tablet in Aug 2013 (870,000 adults 16+)



17% of those without a tablet were likely to get one before the end of year (450,000 adults 16+)



Estimated **1,320,000** adults to have a tablet by year end

Feb 2014

40% now have access to a tablet in Feb 2014 (1,415,000 adults 16+)

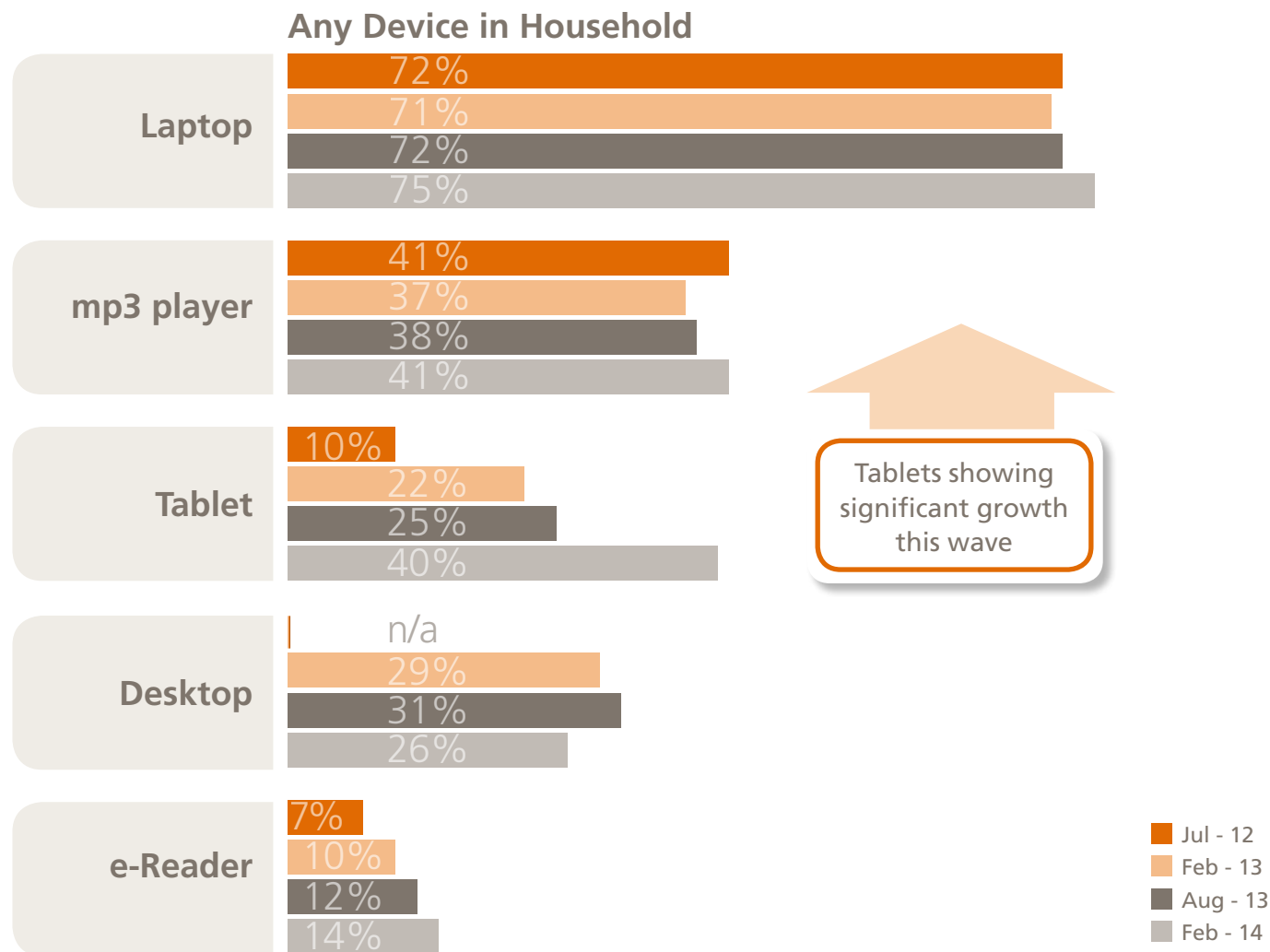


16% of those without a tablet are likely to get one this year (341,000 adults 16+)



Potential for **1,756,000** adults to have access to a tablet by the end of the year

Tablets Showing Significant Growth



Question

Which of the following devices are in your household? It does not matter who owns them in the household.

2

Key Themes

The average age for a child to start having an influence on the technology decisions in the household is

10 years of age
(Based on all adults 16+)

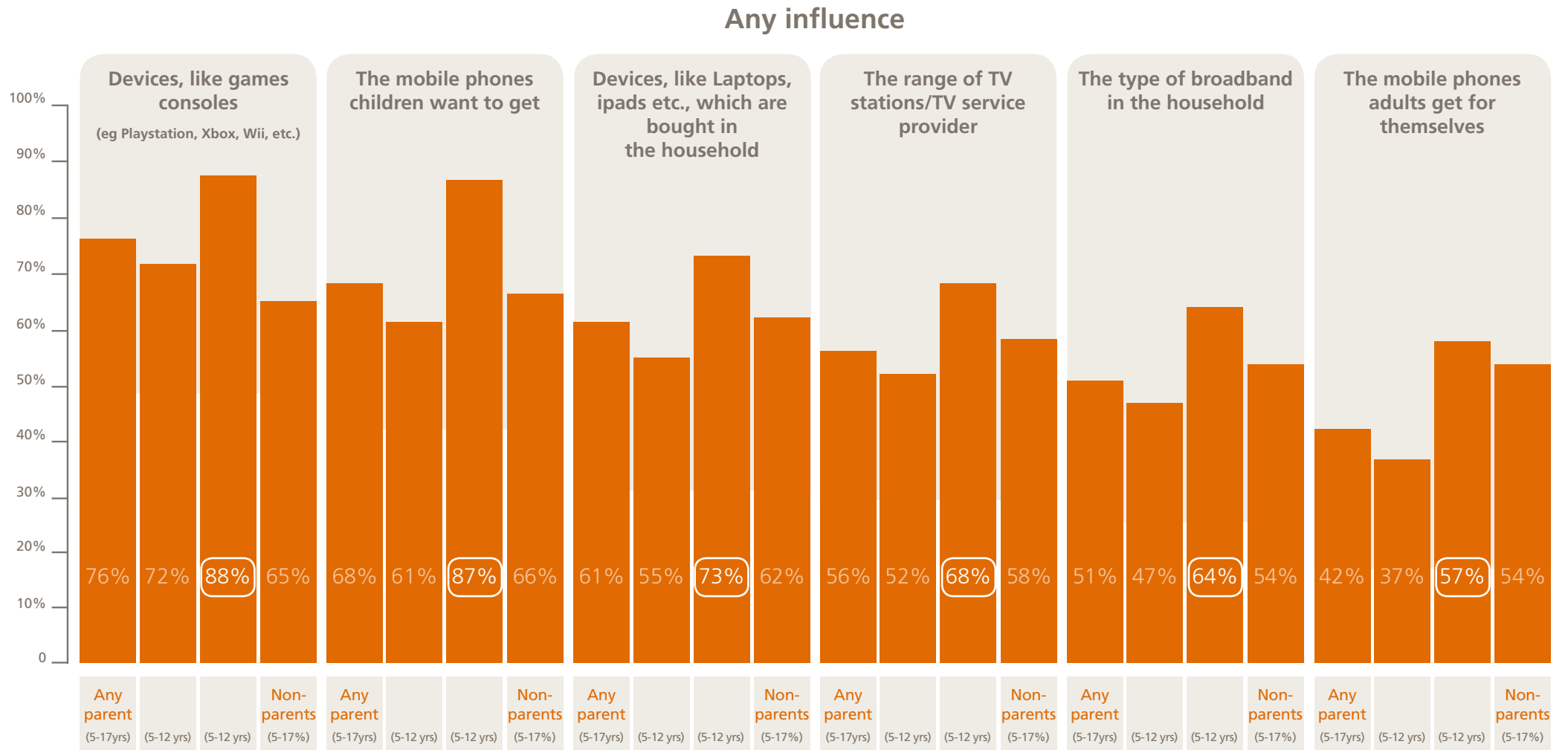


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Question

At what age do your children start to influence technology decisions in your household?

Children having a profound influence on various technologies in the household

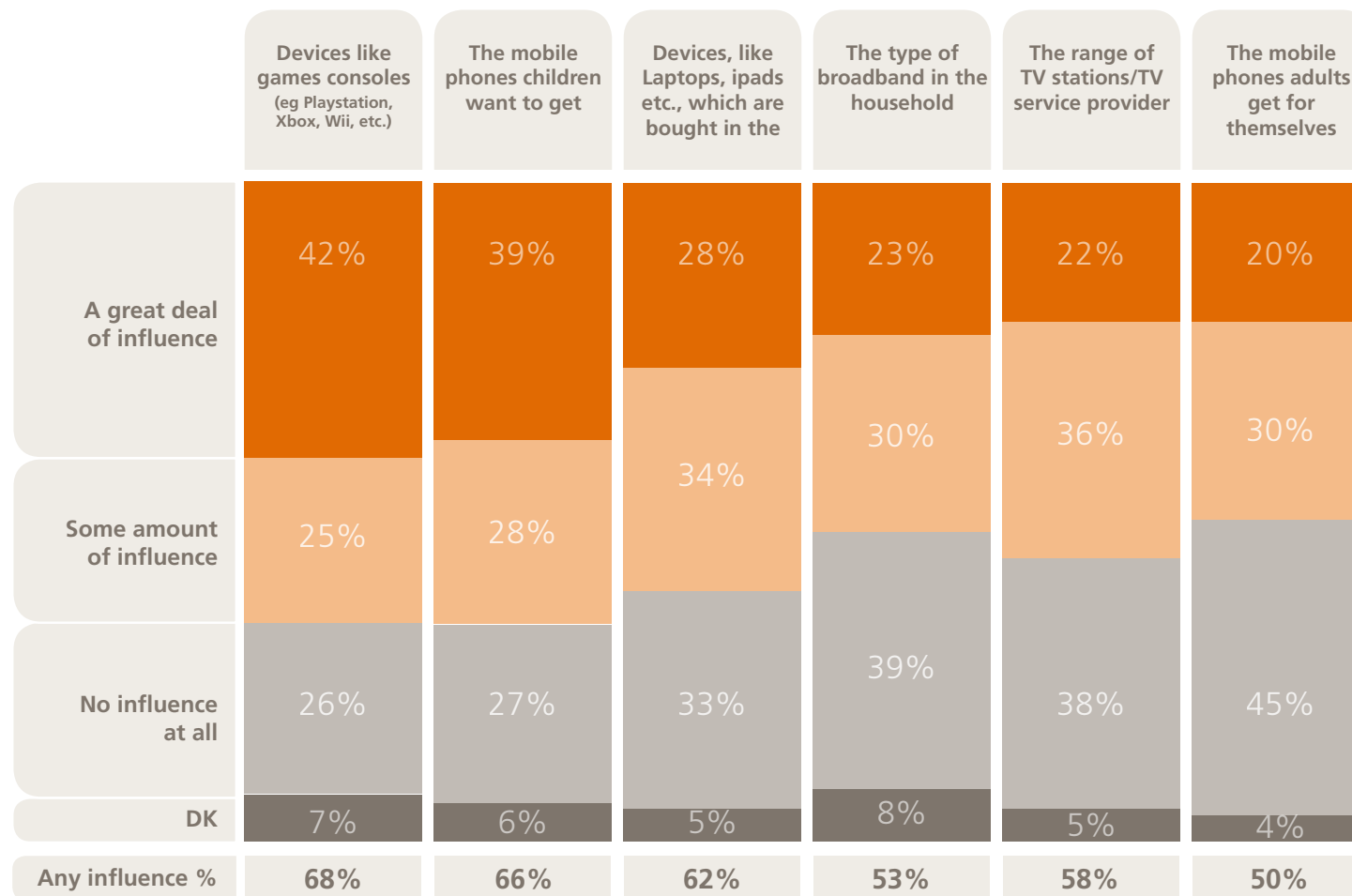


Question

To what extent do children have an influence or advise on the following in the households nowadays?

Extent to which children have an influence on household devices

Base: All Adults 16+ - 1,000



Question

To what extent do children have an influence or advise on the following in the households nowadays?

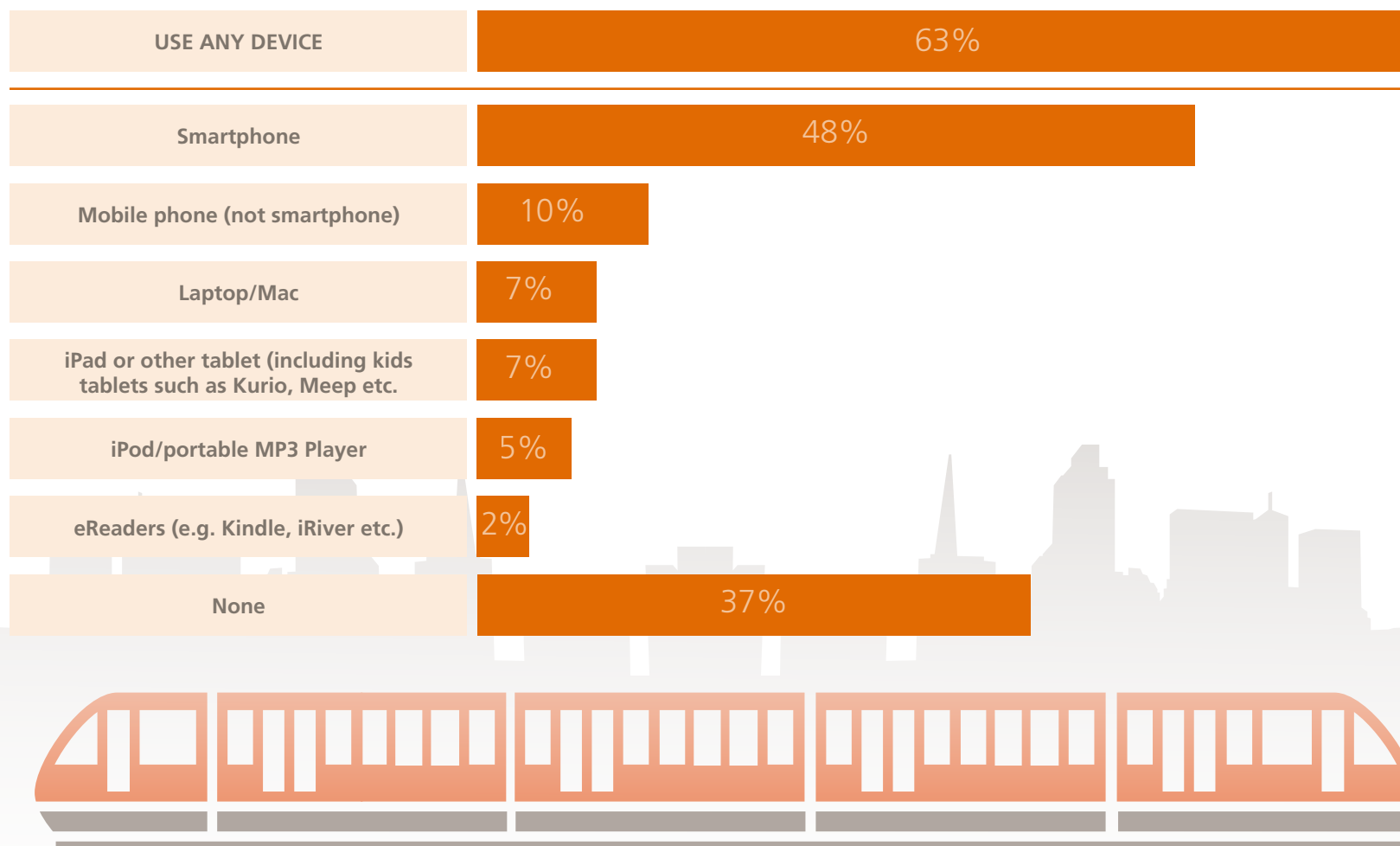
3 Key Themes



The sociable
digital
commuter
has arrived

Almost 2 in 3 commuters (on public transport) use digital devices – virtually all students

Base: All commuters using public transport - 140

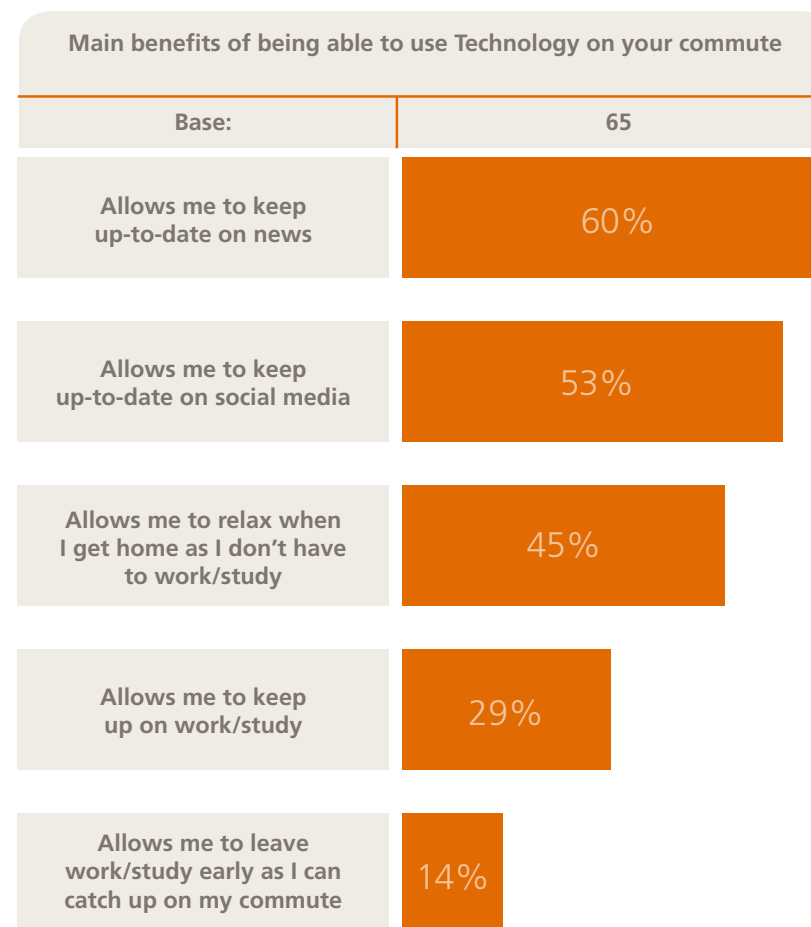
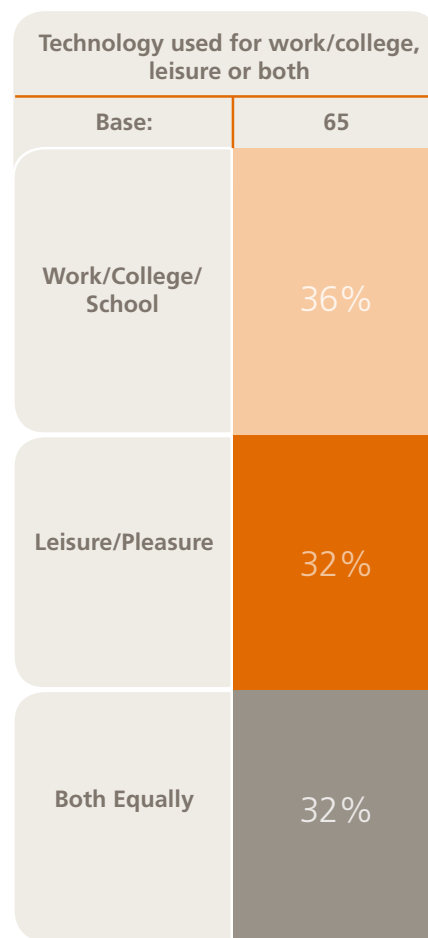
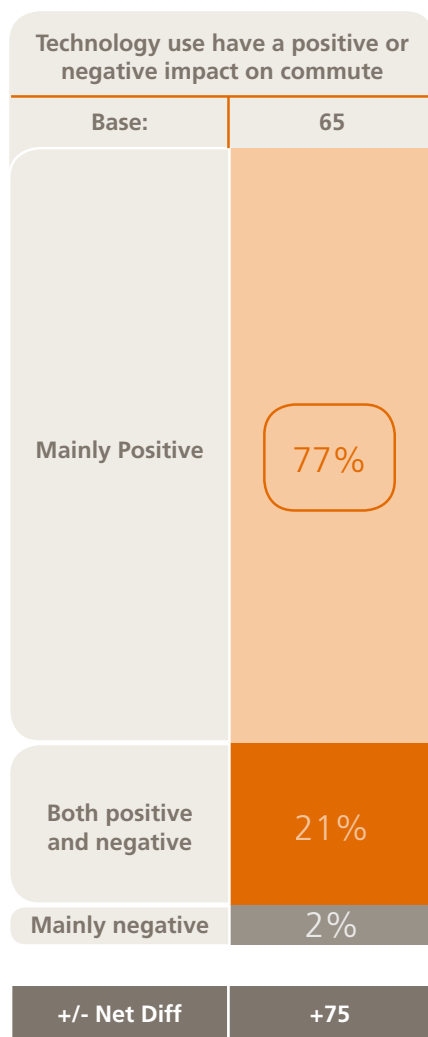


Question

Which of these devices do you use commuting?

Technology benefiting commuters journey

Base: all commuters using Public Transport and use tech on the go 65



? **Question** Does your use of technology mainly have a positive or negative impact on your commute? And do you typically use technology for work/college/school or for leisure/pleasure or for both equally on your commute? Which of the following are the benefits of being able to use technology on your commute?

4

Key Themes

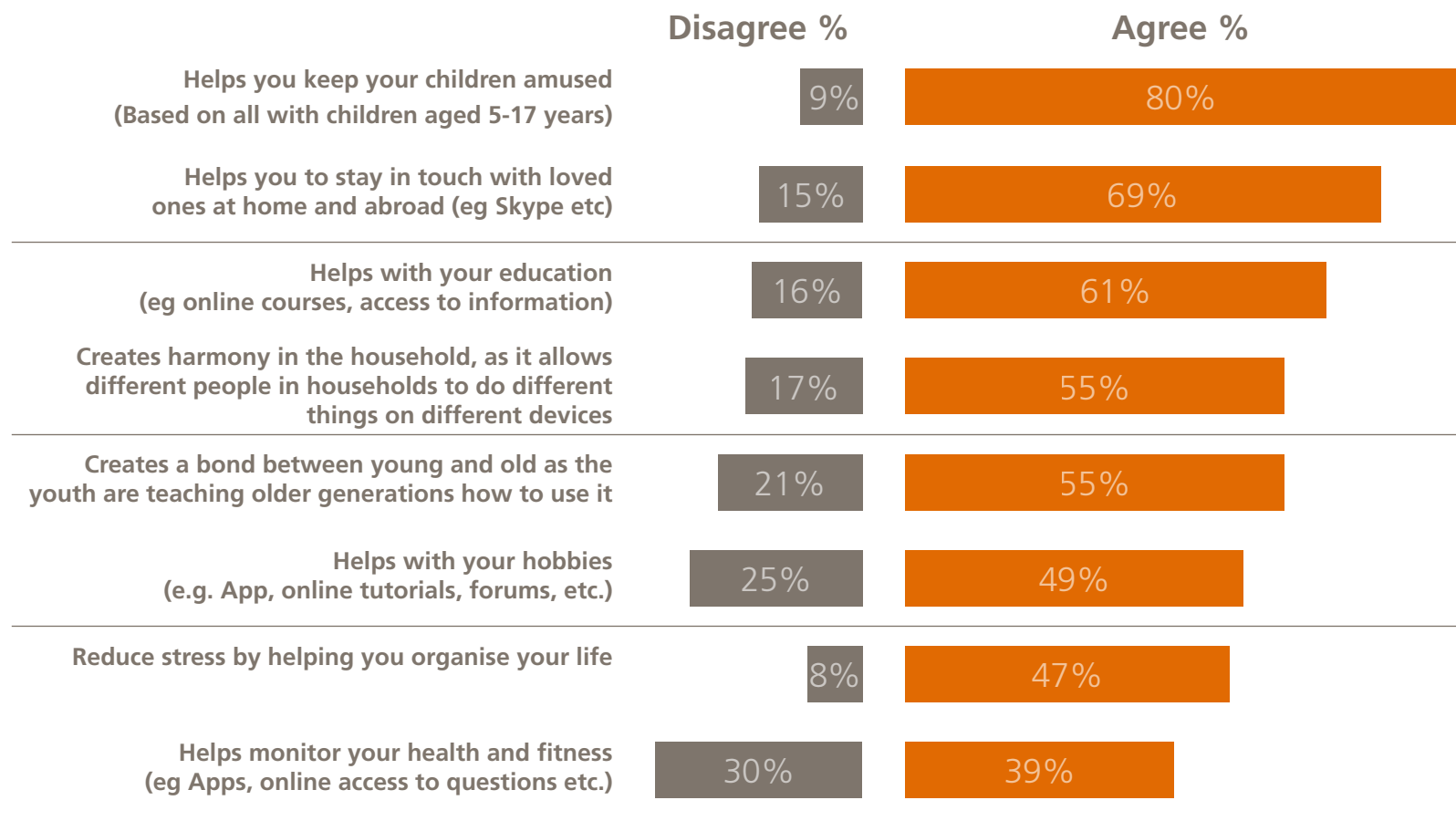
People are embracing technology

for all the goodness
it delivers in our lives



Technology has a positive impact on our lives – especially in keeping our children amused

Base: All Adults 16+ - 1,000

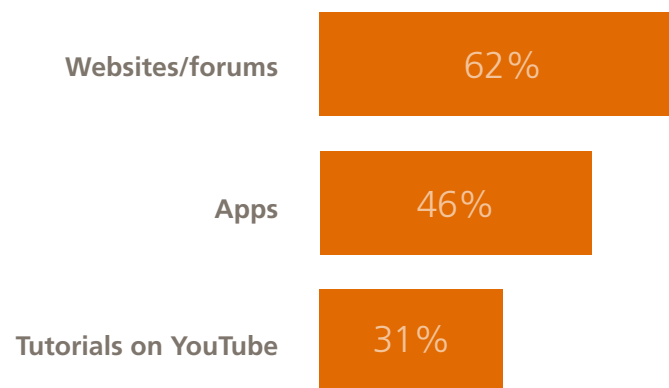
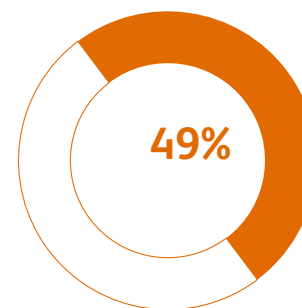


Question

Many of us are constantly on-the-go for various reasons nowadays. I want you to think about how and where technology helps you nowadays. So to what extent do you agree or disagree with each of the following?

Websites and Apps helping with hobbies

Base: All agree that technology helps with hobbies 496



Gender		Age					Region					Area	
Male	Female	16-24	25-34	35-49	50-64	65+	Dublin	Rest of Leinster	Munster	Conn/ Ulster	All Leinster incl Dub	Urban	Rural
250	246	107	117	153	86	33	166	146	117	67	312	356	140
%	%	%	%	%	%	%	%	%	%	%	%	%	%
65	58	62	60	65	62	51	56	65	65	61	60	62	60
47	45	53	61	47	27	9	43	39	52	59	41	47	43
33	30	44	34	31	19	11	30	40	36	9	35	33	27

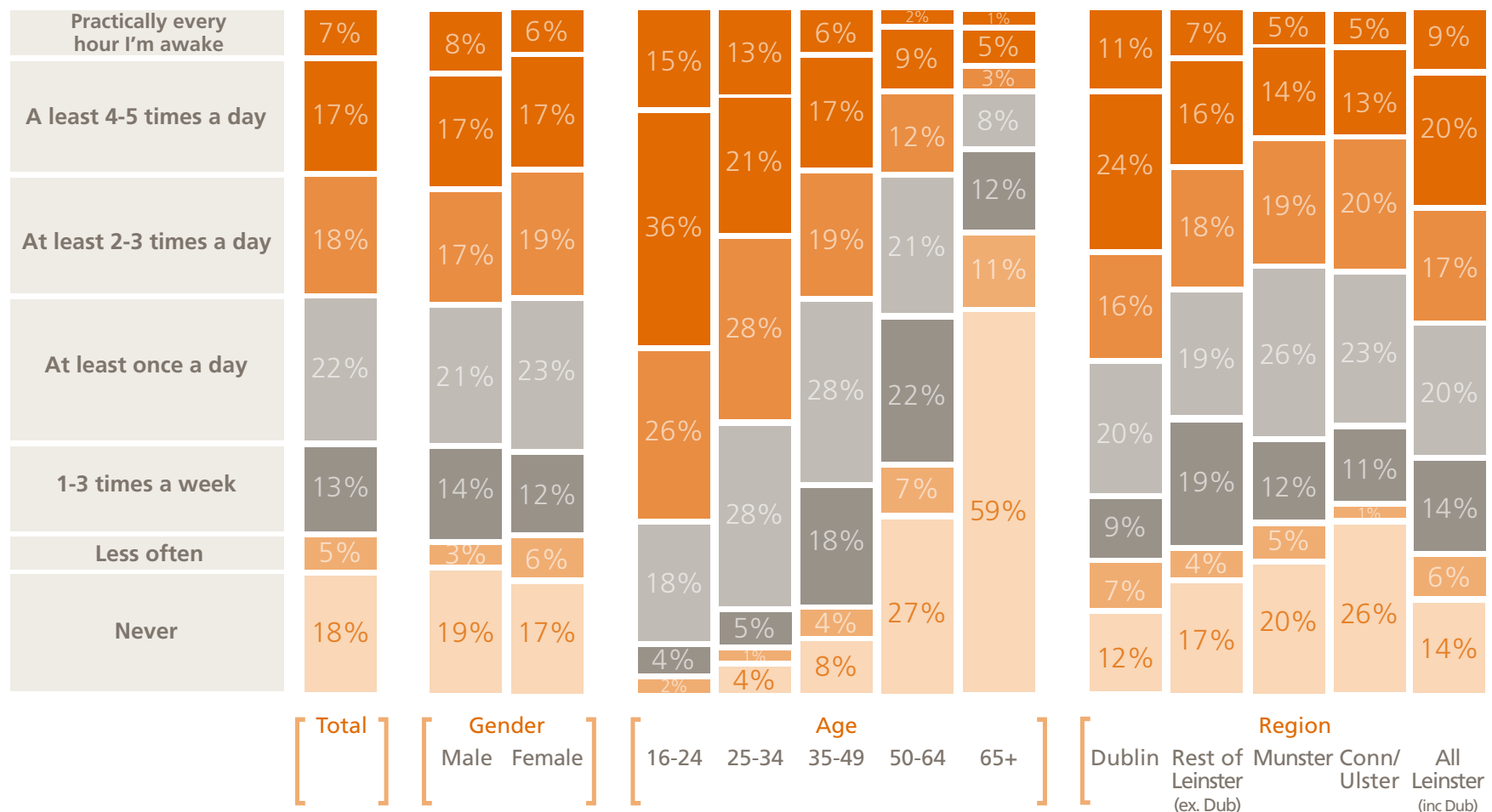


Question

Which of the following do you tend to use for help with your hobbies?

All 16-24 year olds are now online!

Base: All Adults 16+ - 1,000



Question

How often do you yourself access the internet nowadays?

5

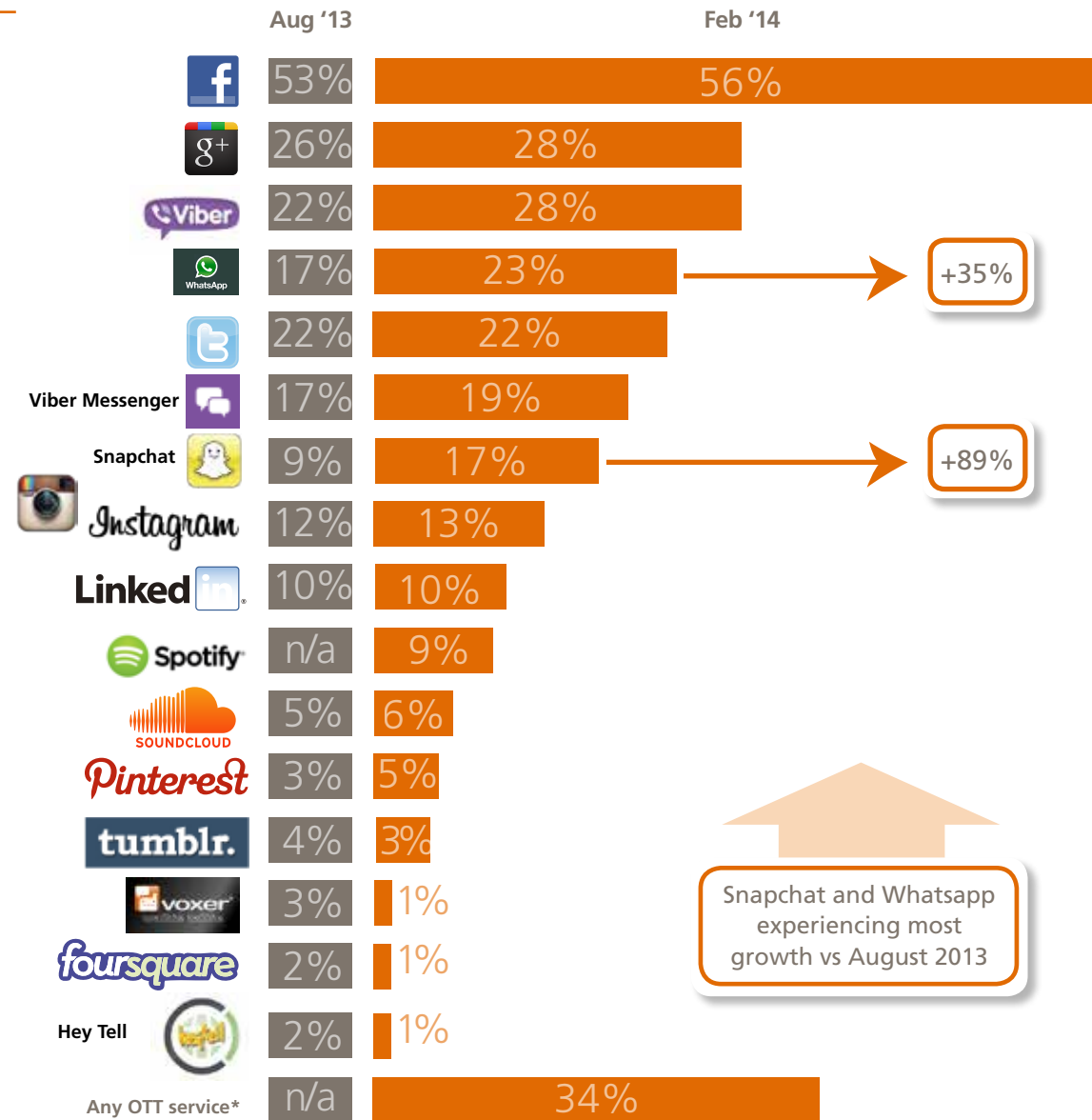
Key Themes

The ever-changing face of social media



Social media usage nowadays

Base: All Adults 16+ - 1,000



*Whatsapp/Viber/Heytell,Voxer

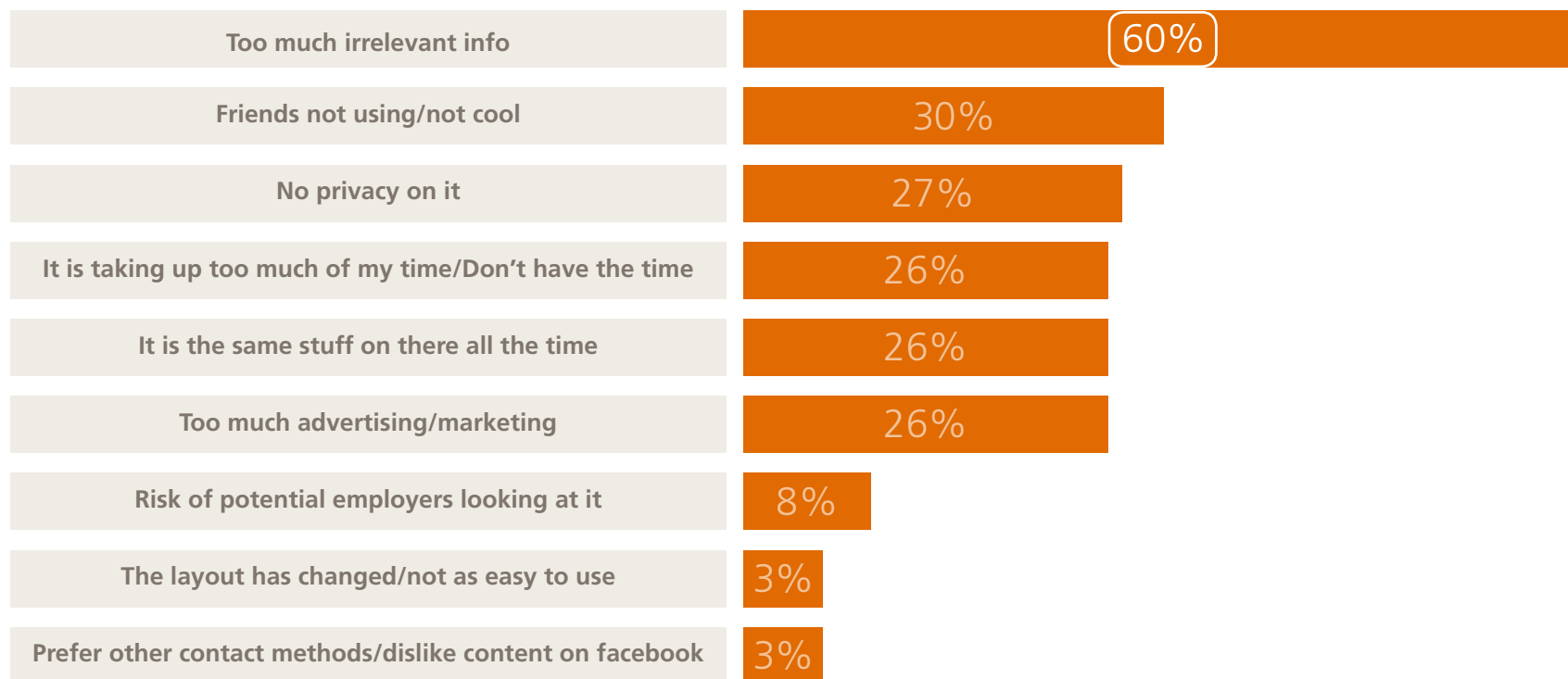


Question

Which of the following, if any, of these do you ever use nowadays?

Too much irrelevant info the main reason for using Facebook less

Base: All use Facebook less - 137



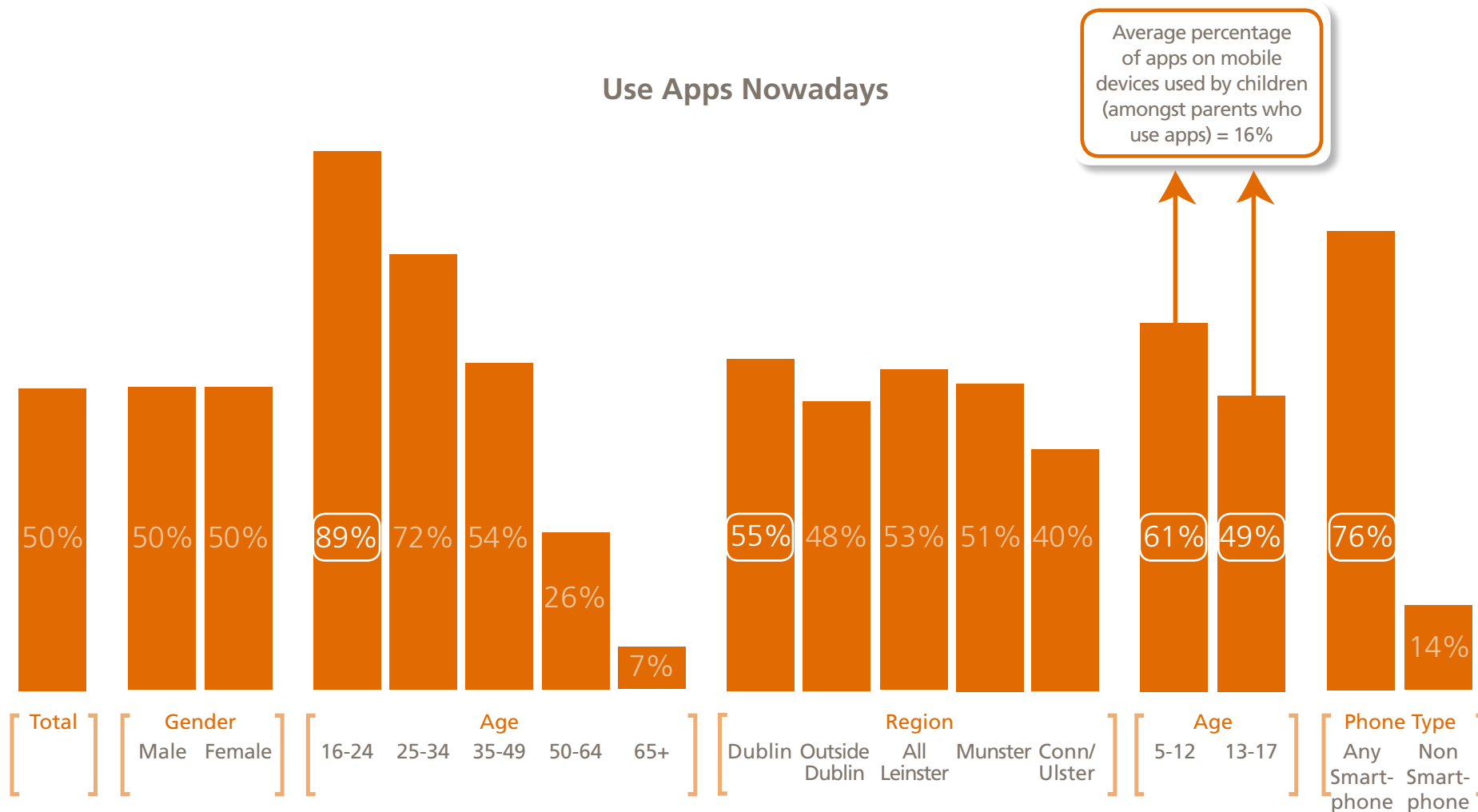
Question

You mentioned you are using Facebook less compared to a year ago – why is that?

Half of all adults are now using apps – rises to 76% amongst smartphone users

Base: All Adults 16+ - 1,000

Use Apps Nowadays



Question

Do you use any apps nowadays?

6

Key Themes



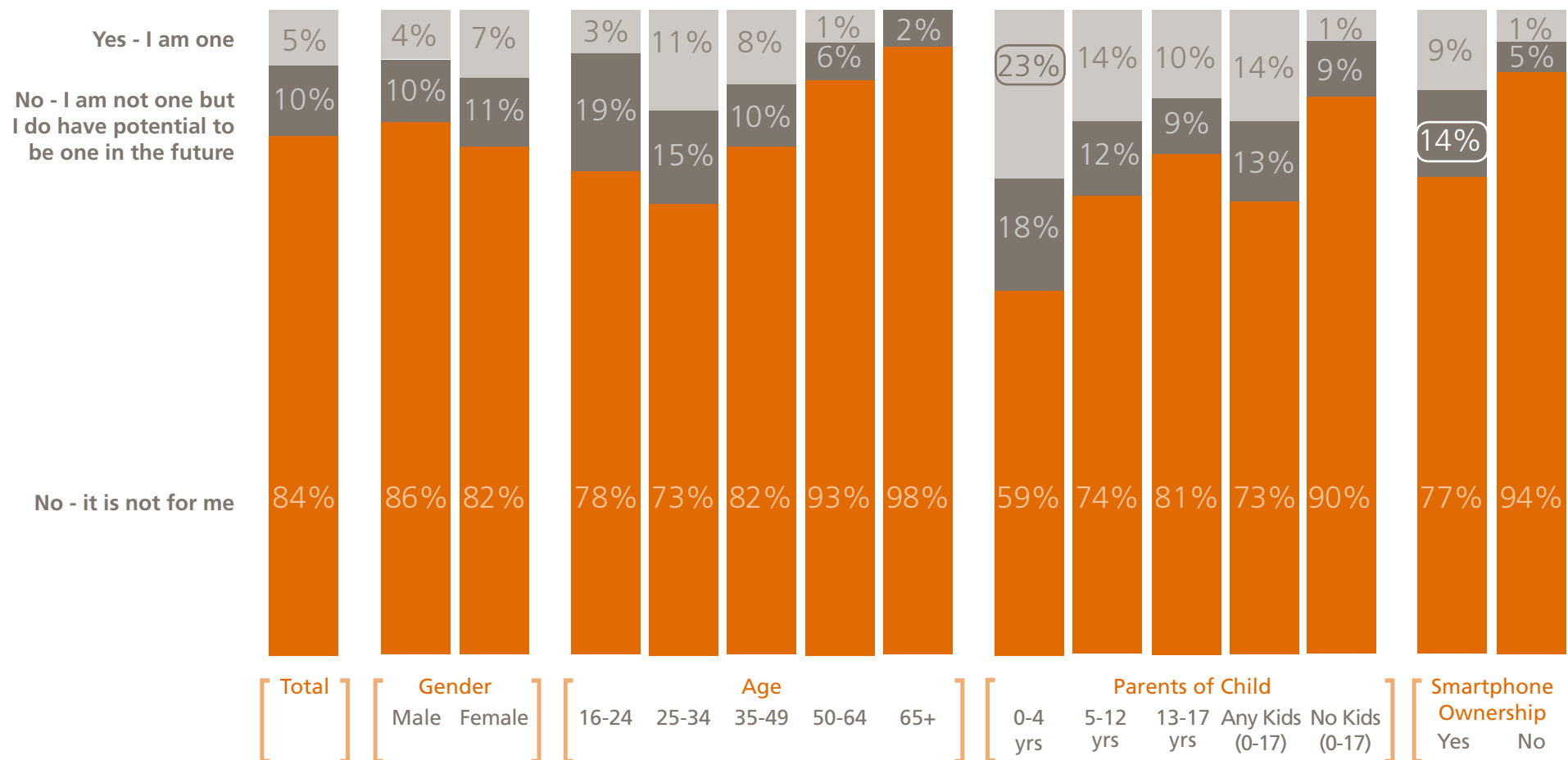
73% of
parents claim
‘Sharenting’
is not for them

**Question**

Do you know what the term ‘Sharenting’ means in the context of social media?

Smartphone users have the highest potential to be 'Sharenters'

Base: All Adults 16+ - 1,000

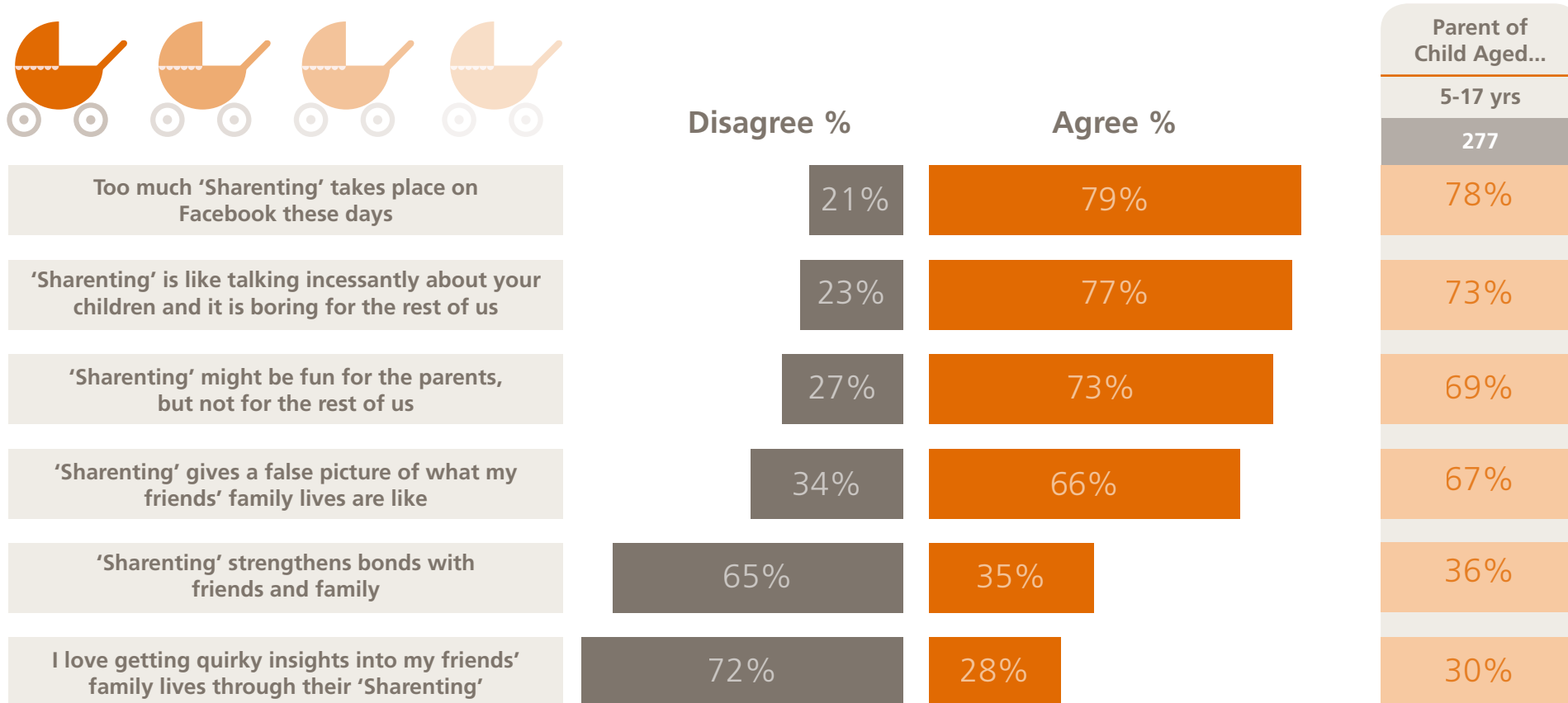
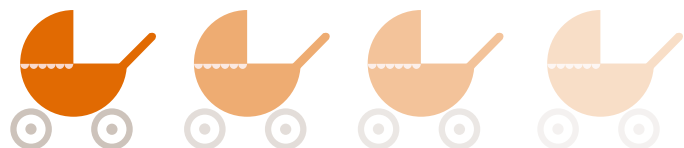


Question

'Sharenters' are parents who blog, tweet and post pictures online about aspects of their children's lives. Are you, or do you have the potential, to be a 'Sharenter' in the future?

Sharenting

Base: All Adults 16+ - 1,000



Question

And to what extent do you agree or disagree with....?

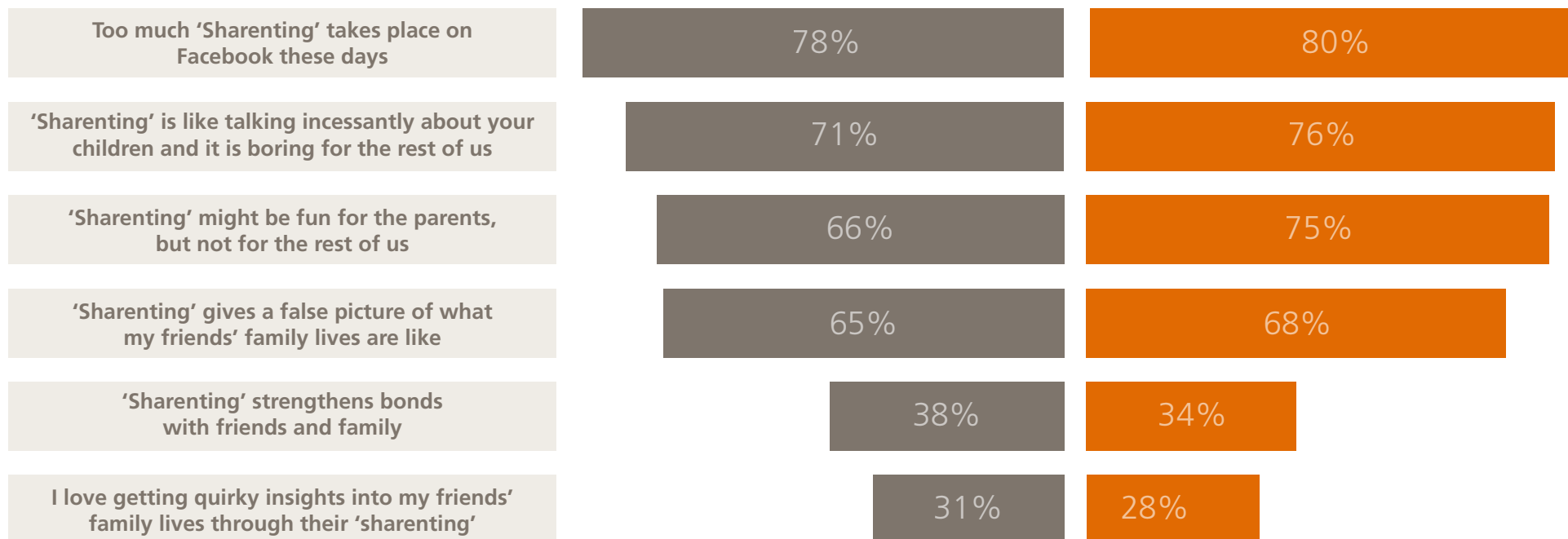
Sharenting

Base: All parents of children aged 5-17 years - 277



Children aged
5-12 years

Children aged
13-17 years



Question

And to what extent do you agree or disagree with....?

7 Key Themes

Quirky digital facts



Have you ever....

Base: All Adults 16+ - 1,000

Followed a celeb on Facebook/Twitter to get an insight into their lifestyle



49% of 16-24 year olds

Posted embarrassing pictures of friends on Facebook



54% of 16-24 year olds

Used social media to make business contacts



20% of 25-34 year olds
20% of full time workers

Been embarrassed to admit that you follow/view a famous person



24% of 16-24 year olds

Been anxious that you would miss something on social media by not being online



46% of 16-24 year olds

Taken 'selfies' and posted online or on social media



55% of 16-24 year olds

Talked up your social life online so it seemed better than it was



43% of 16-24 year olds

Admitted visiting an online dating site



25% of 25 - 35 year olds



Question

Thinking back honestly, have you ever....?

Thank you

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