

eircom Home Sentiment Survey

A tech savvy nation that needs to be
constantly connected

April 2013



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Introduction

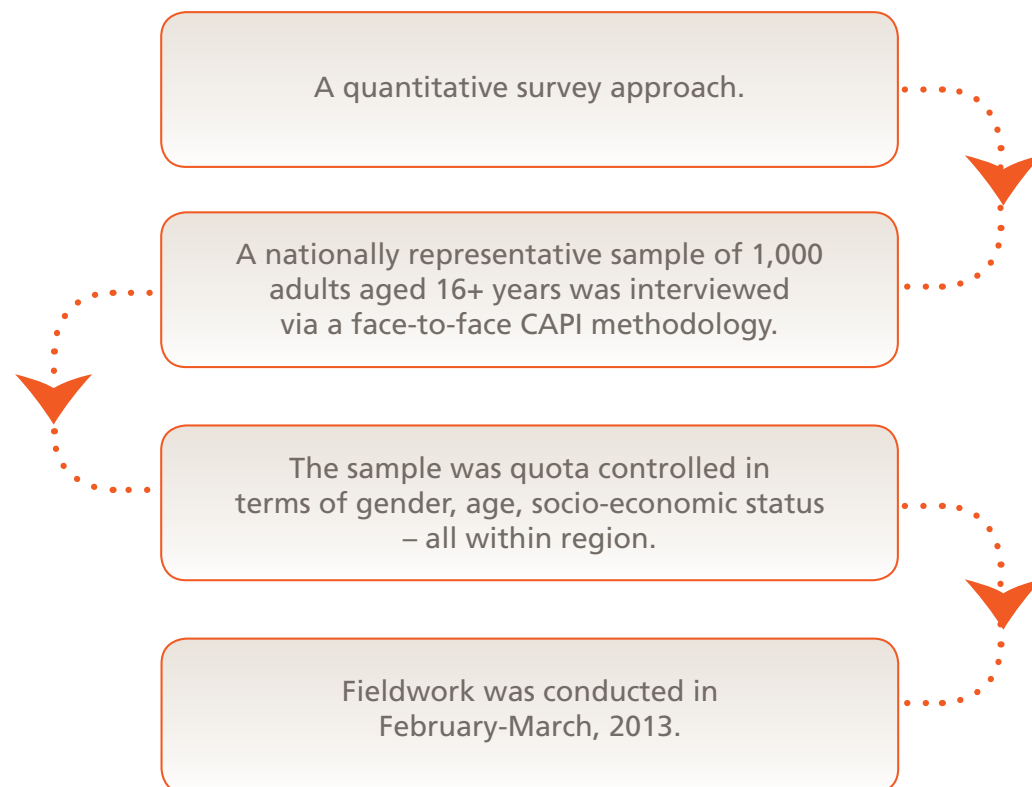
The eircom Home Sentiment Survey (eHSS) is a nationwide survey undertaken by eircom to understand the usage and impact of technology in Irish homes. As Ireland's largest telecommunications provider, the eircom Home Sentiment Survey aims to record the social changes experienced in Ireland as a result of technology and innovation. The bi-annual survey, taken across 1,000 Irish households nationwide, is conducted by Behaviour & Attitudes.

The first eHSS results were released in August 2012, featuring insights into Ireland's 'Always On' technology culture, the impact of technology in the home and changes to culture in Irish homes as a result of broadband, smartphones and technology.

Phase two of the bi-annual eircom Home Sentiment Survey (eHSS) highlights how the nation has a desire to be constantly connected, how Irish households have increased their usage and ownership of online enabled devices. It also features insights on how certain demographics believe that the art of conversation has evolved and the debate around phone etiquette continues.



Research Methodology



Key Findings



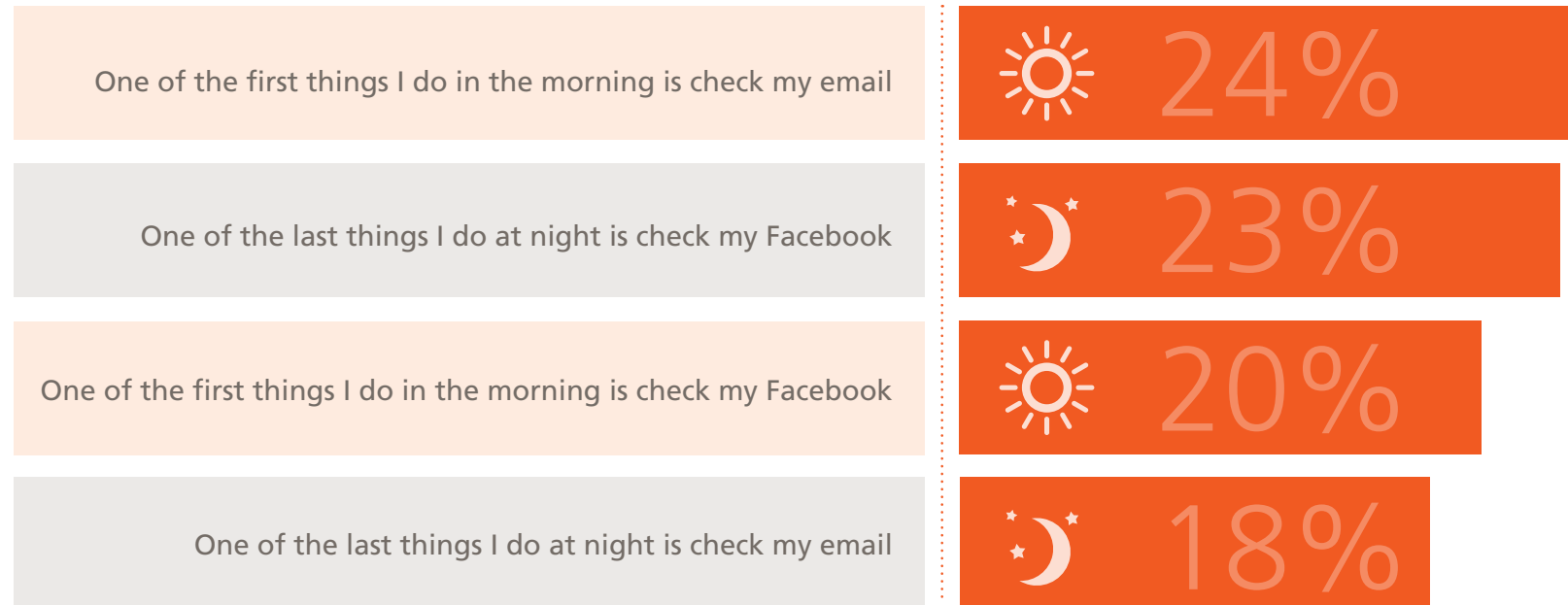
Key Themes

1. Always on Culture

For 1 in 4, accessing email is one of the first things done in the morning

Base: All adults 16+ - 1,000

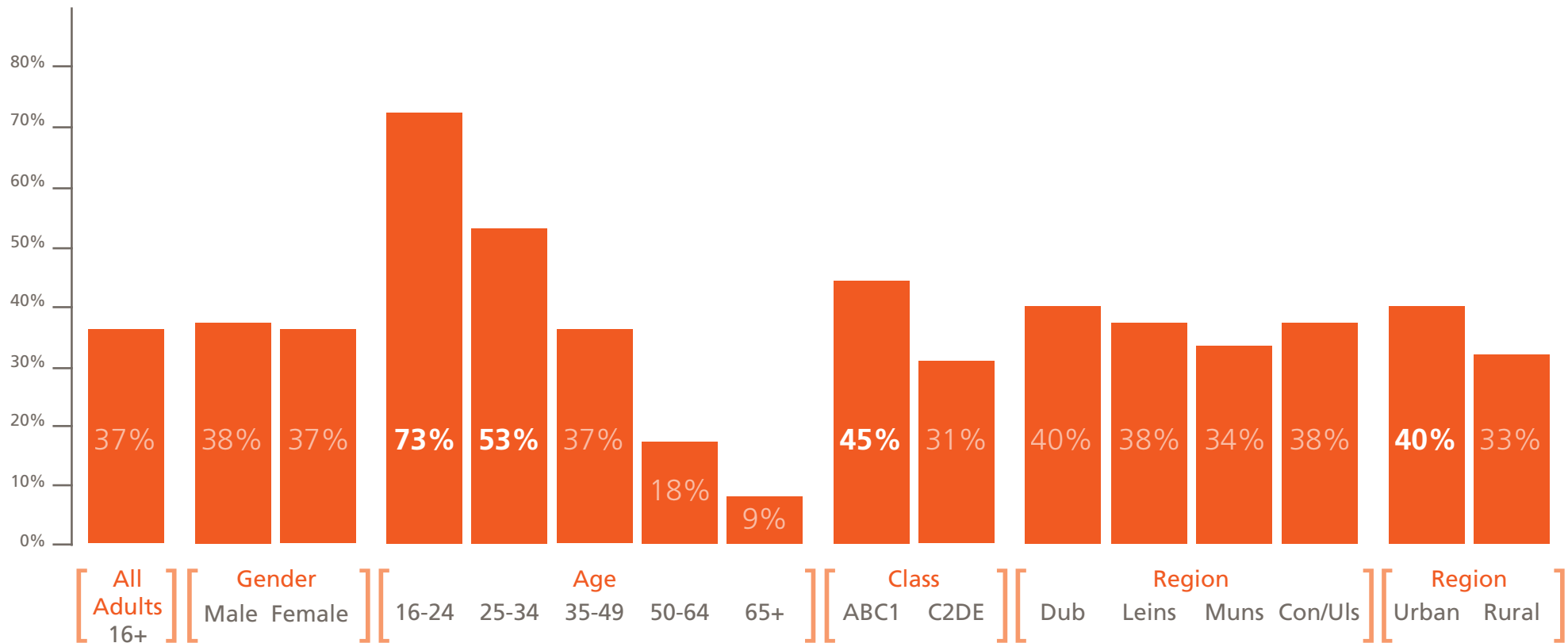
37% (1.3 million) people agree with any of these statements
(61% under 35, 24% 35+ years)



First thing in the morning/last thing at night – checkers are under 35, middle class and urban

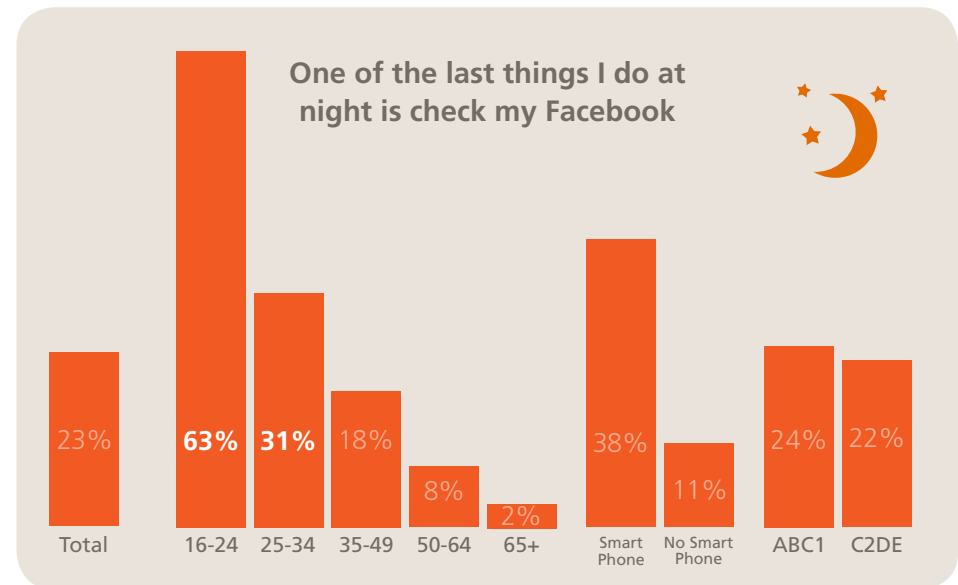
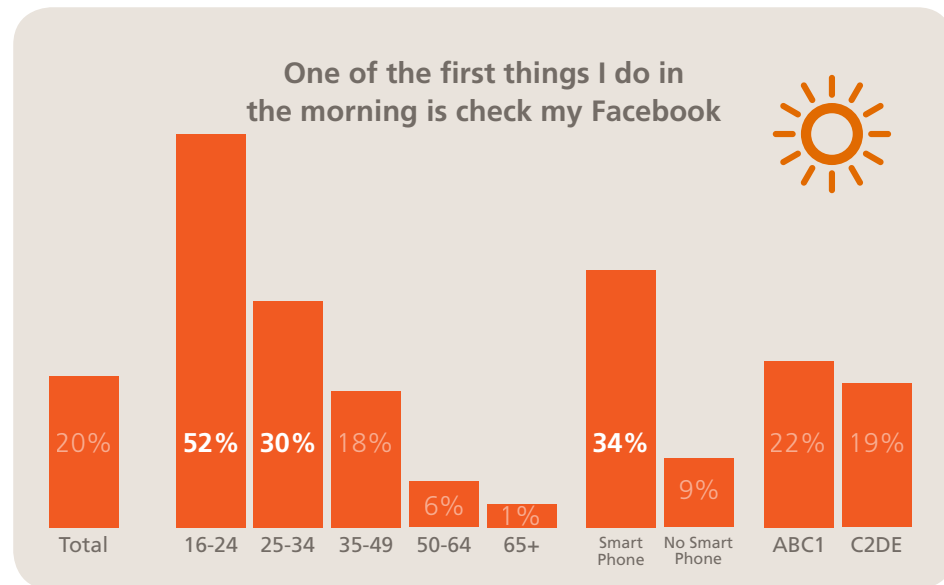
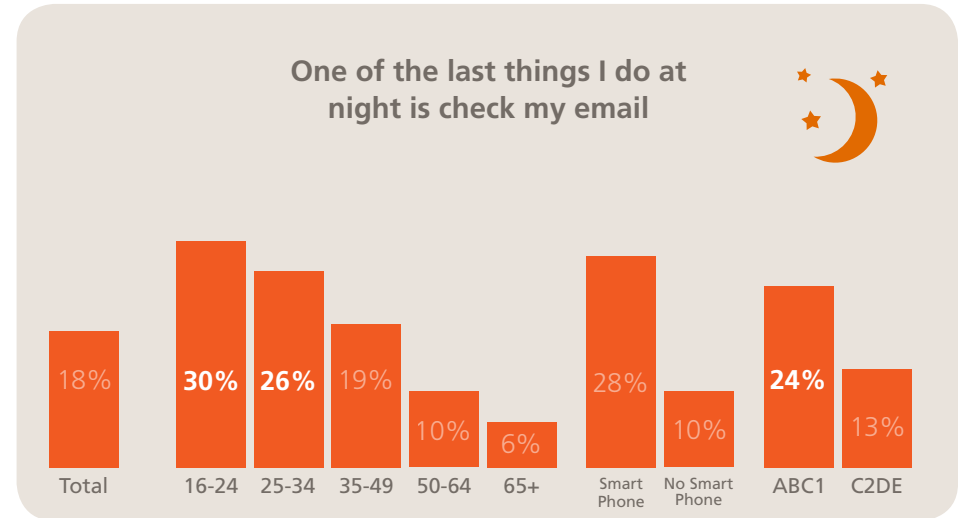
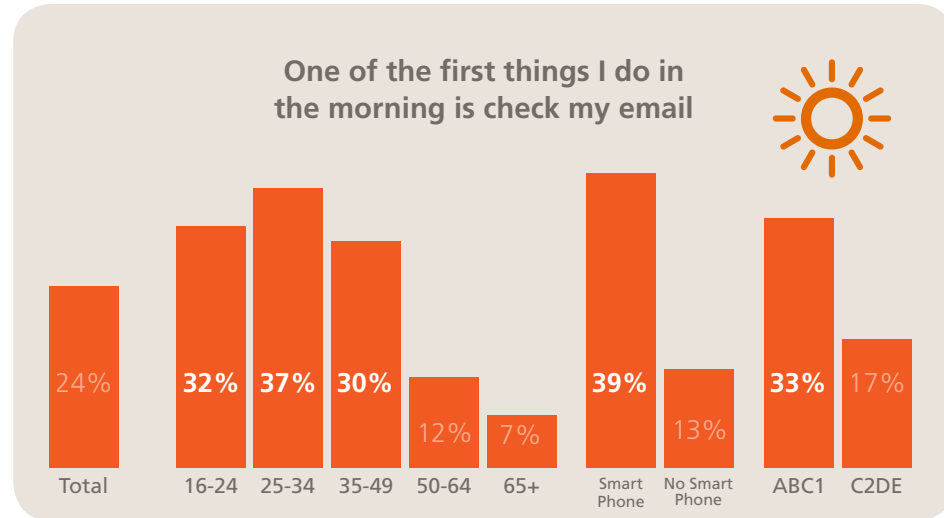
Base: All adults 16+

% checking either email/Facebook first thing/last thing morning/night



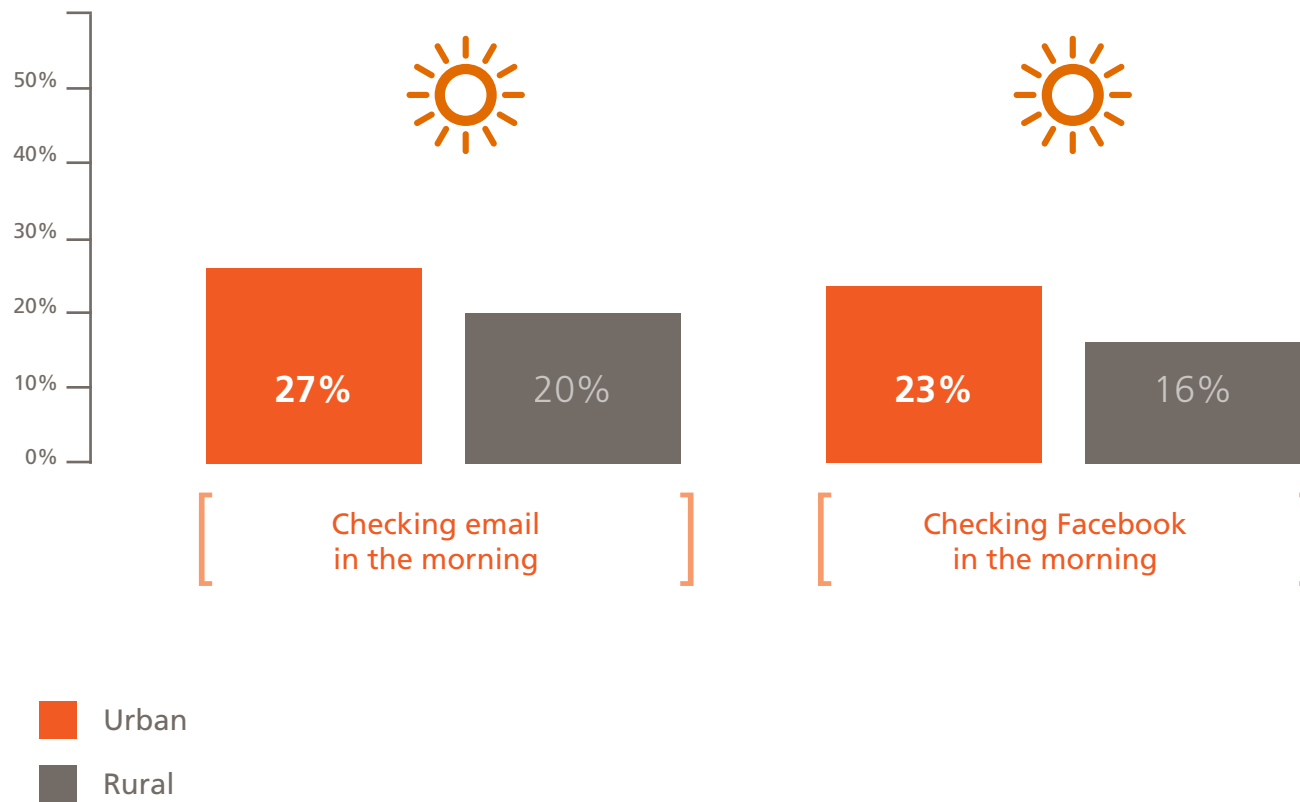
Q.22 To what extent do you agree or disagree that ...

Younger and middle class cohorts most likely to being constantly connected



However the country is divided on being connected

More urban connections?



Key Stats

The in-depth bi-annual nationwide survey shows how we are embracing technology at every opportunity and how it is impacting every aspect of our lives. We are now a nation that has a desire to stay connected 24/7, with almost a million of us admitting to checking our emails first thing in the morning, while over a quarter of a million of us now check work emails on holidays. The nation's need to be constantly connected also extends to evenings and weekends, with over half of those surveyed revealing that they won't and can't switch off.



Key Themes

2. From the Land of Saints and Scholars to a Land of Digital Devices



Virtually all households with children have some form of potential device for online access



Parents with children aged 5-17 years

98%



Adults with no children 5-17 years

76%



Any potential online device in household*

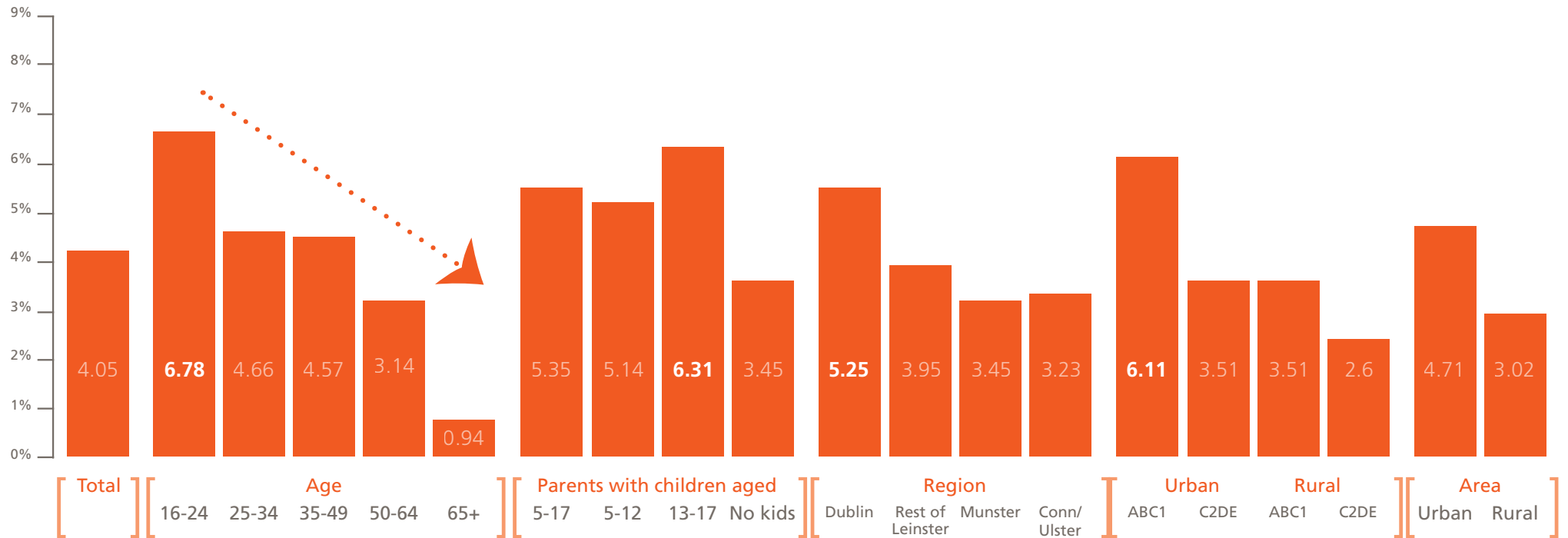
* (i.e. either; Laptop/Mac, Smartphone, Games console, iPod/Portable MP3 player, Desktop Computer, iPad/Tablet, eReader or Smart TV.

4 The average number of Potential Online Devices in the home



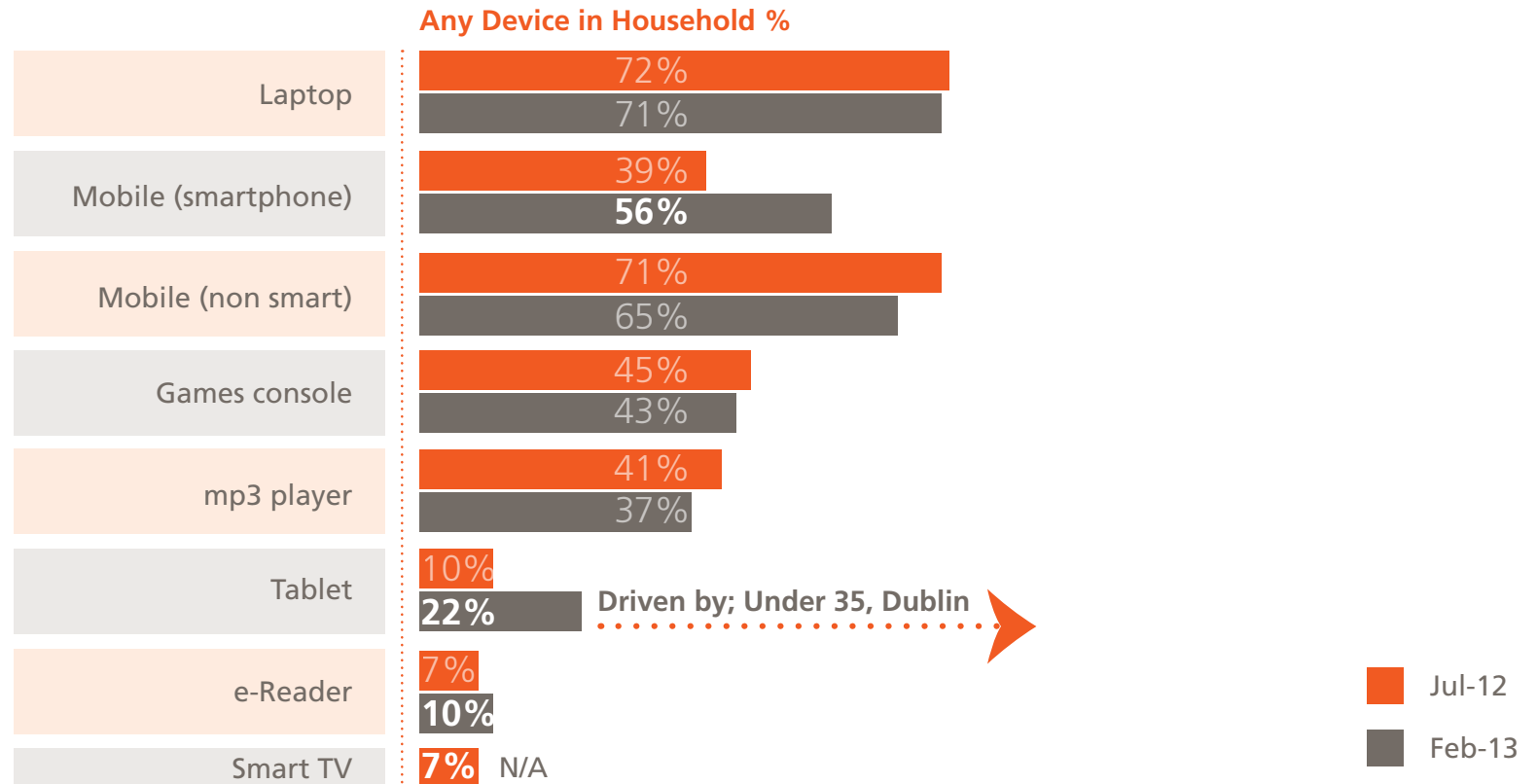
On average adults have access to 4 Potential Online Devices at home

Also parents with children (especially teenagers) have more device access. (5.14 devices available = 5-12 years, 6.31 amongst parents of 13-17s). The class gap is bigger in urban areas.



Households continue to gear up their technology: tablets, smartphones and eReaders show growth, with Smart TVs emerging. On-the-Go devices are the trend

The larger the household, the higher the access levels – for example over one third of 4+ person households have access to an iPad/Tablet.



Q.6 Which of the following devices are in your household? It does not matter who owns them in the household.

Devices in the Household x Region & Socio-Economic Status

Base: All adults 16+

	Total	Social Class		Region				Area	
		ABC1/F50+	C2DE/ F50-	Dublin	Leinster	Munster	Conn/Ulster	Urban	Rural
Base:	1000	507	493	288	250	283	179	648	352
	%	%	%	%	%	%	%	%	%
- ANY Potential Online Device* -	83	92	76	90	85	78	77	87	78
Standard TV set	93	93	92	95	97	87	92	92	93
DVD Player or recorder	75	78	72	79	77	70	73	79	68
Laptop/Mac*	71	81	63	76	71	70	65	74	66
Mobile phone (not a smart one)	65	59	69	67	61	64	68	65	65
Digital Camera	62	71	53	72	60	54	60	68	52
Smart mobile phone*	56	69	46	66	60	49	48	61	50
Games Consoles (eg X-box, Wii, PS2/3 etc.)*	43	46	41	53	48	36	30	48	35
iPod/portable MP3 Player	37	46	30	52	35	33	25	44	26
Desktop computer*	29	40	20	35	25	25	32	32	24
iPad or other tablet (including kids tablets such as Kurio, Meep etc.)*	22	30	16	34	21	16	16	28	14
eReaders (eg Kindle, iRiver, Sony reader etc.)*	10	14	6	15	9	7	6	12	6
Smart TV set (one that connects directly to broadband and has apps built in)*	7	9	6	7	5	7	12	8	6

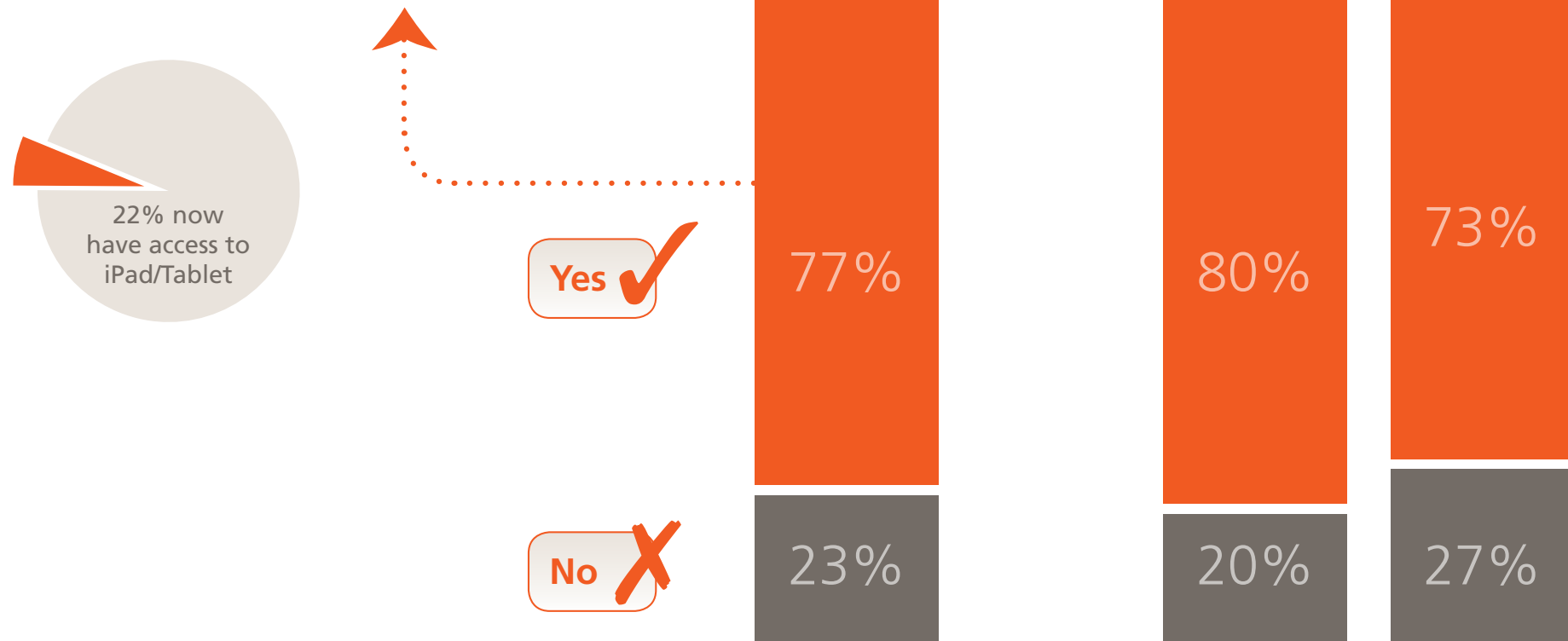
Q.6

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

3 in 4 of tablet users still use a laptop or desktop computer for personal use

Base: All have tablet

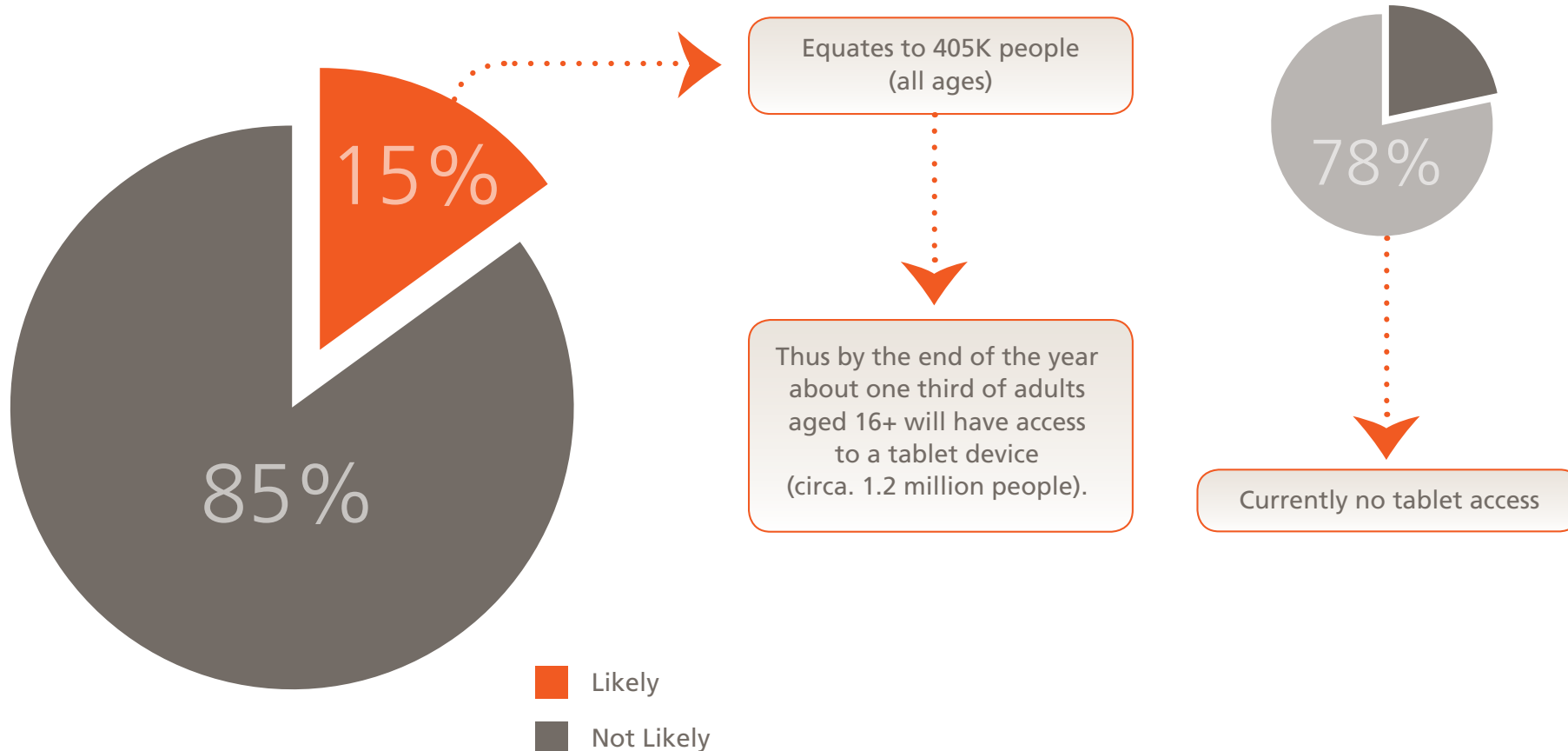
Note 89% of tablet users also use a laptop/mac at all nowadays (including work/school/college)



Q.16a Since getting your tablet/iPad do you also still use a laptop or Desk Top Computer for personal use (i.e. excluding what's available in work/school/college)?

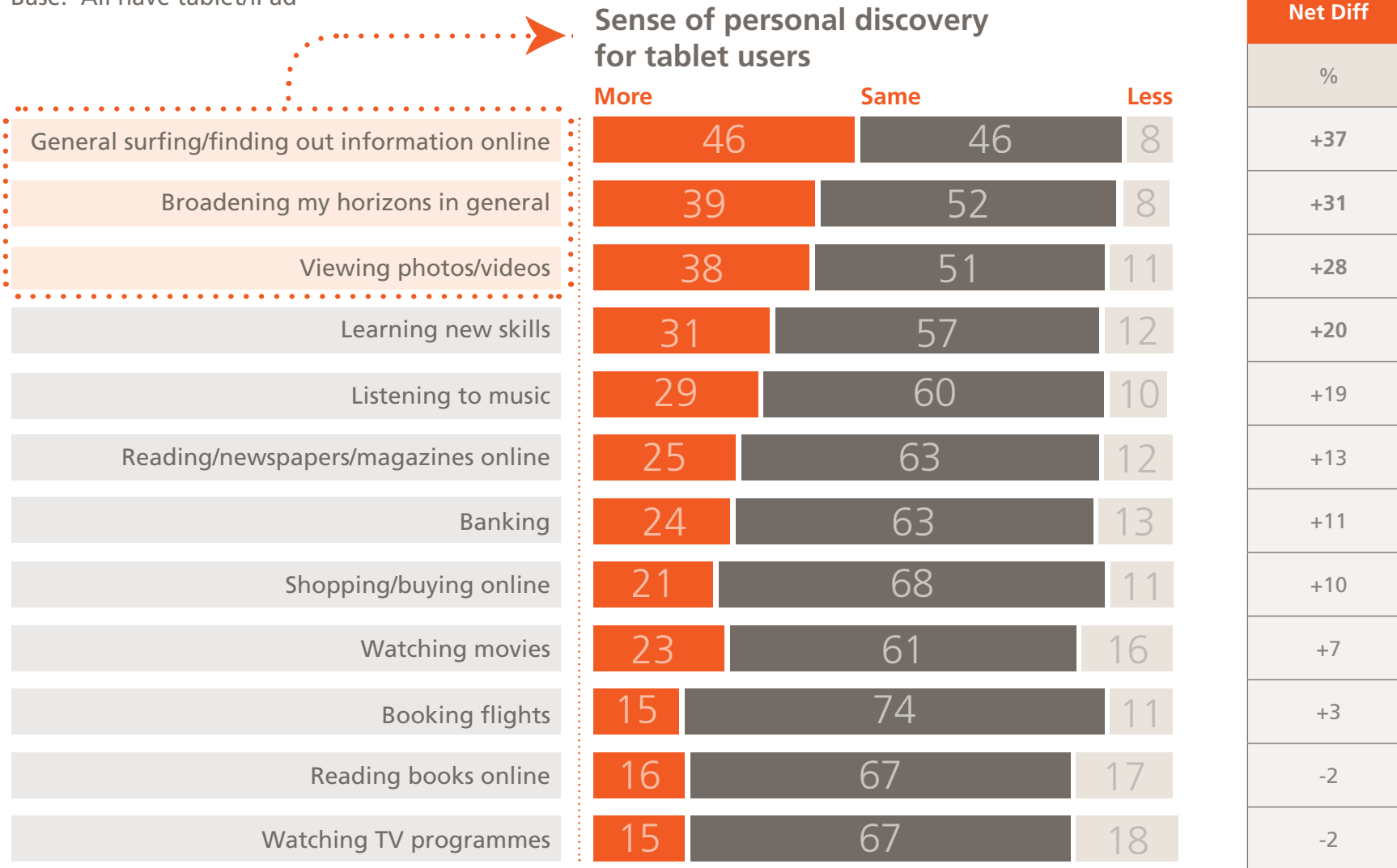
15% likely to get an iPad/other tablet this year

Base: All without iPad/tablet access



Positive Impact of tablet/iPads

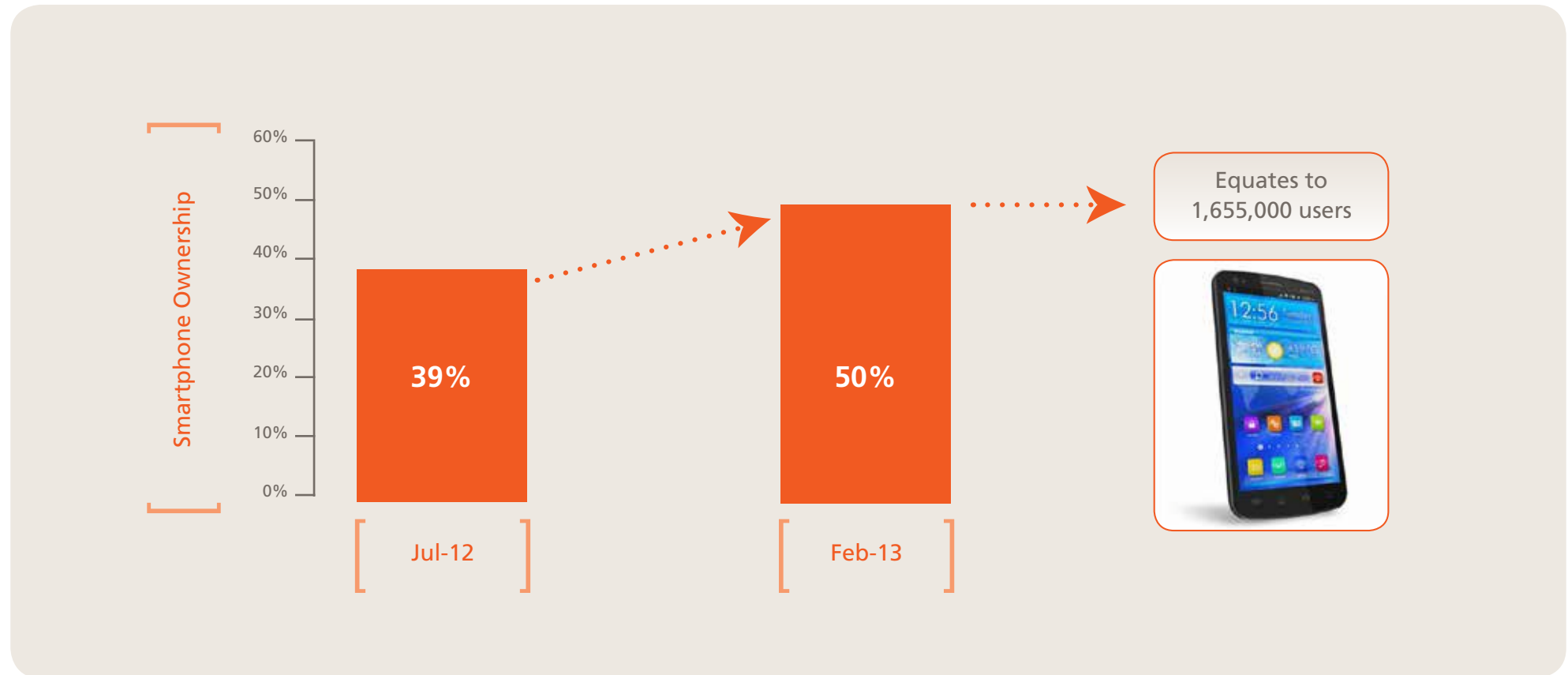
Base: All have tablet/iPad



Q.16b Since you got your tablet/iPad which of the following are you doing more of, less of, or the same amount? ...

Smartphone ownership has dramatically increased

Base: All with mobile



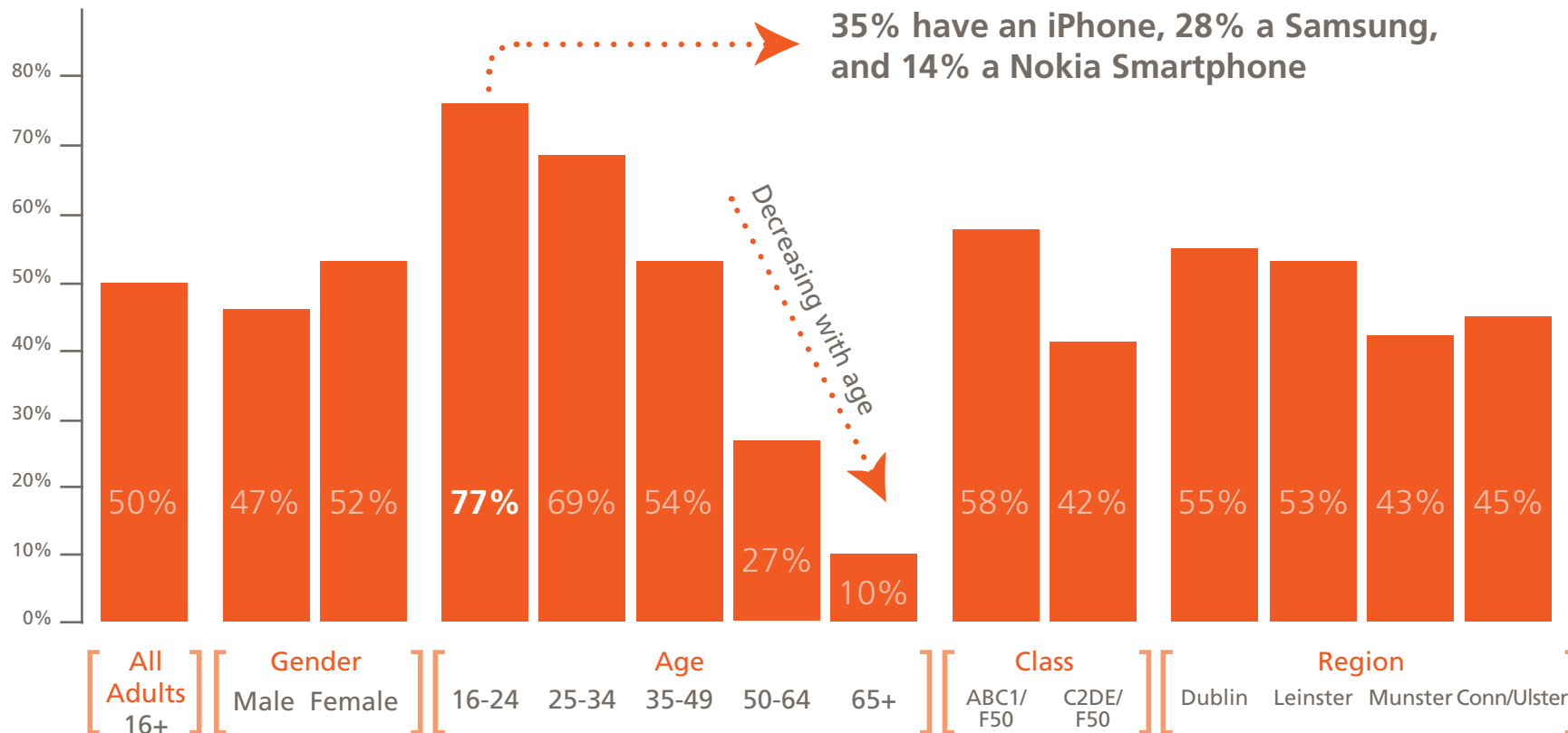
Q.4

And 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

Who now owns a smartphone?

Base: All with mobile

Age & Class Skew Evident. Also 3+ person households is the tipping point for smartphones.



Q.4

And 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

Key Stats

Irish households are now a network of online users; there is an average of four devices that connect to the internet in every Irish home. In the last six months alone, tablet ownership has doubled. This year 15% of us intend to buy a tablet meaning 1.2 million people will have access to a tablet by the end of the year. This has led to some interesting trends in usage. Since the last eHSS survey, smartphone ownership has also dramatically increased; from 39% to 50%. This equates to 1.6m smartphone users in Ireland.

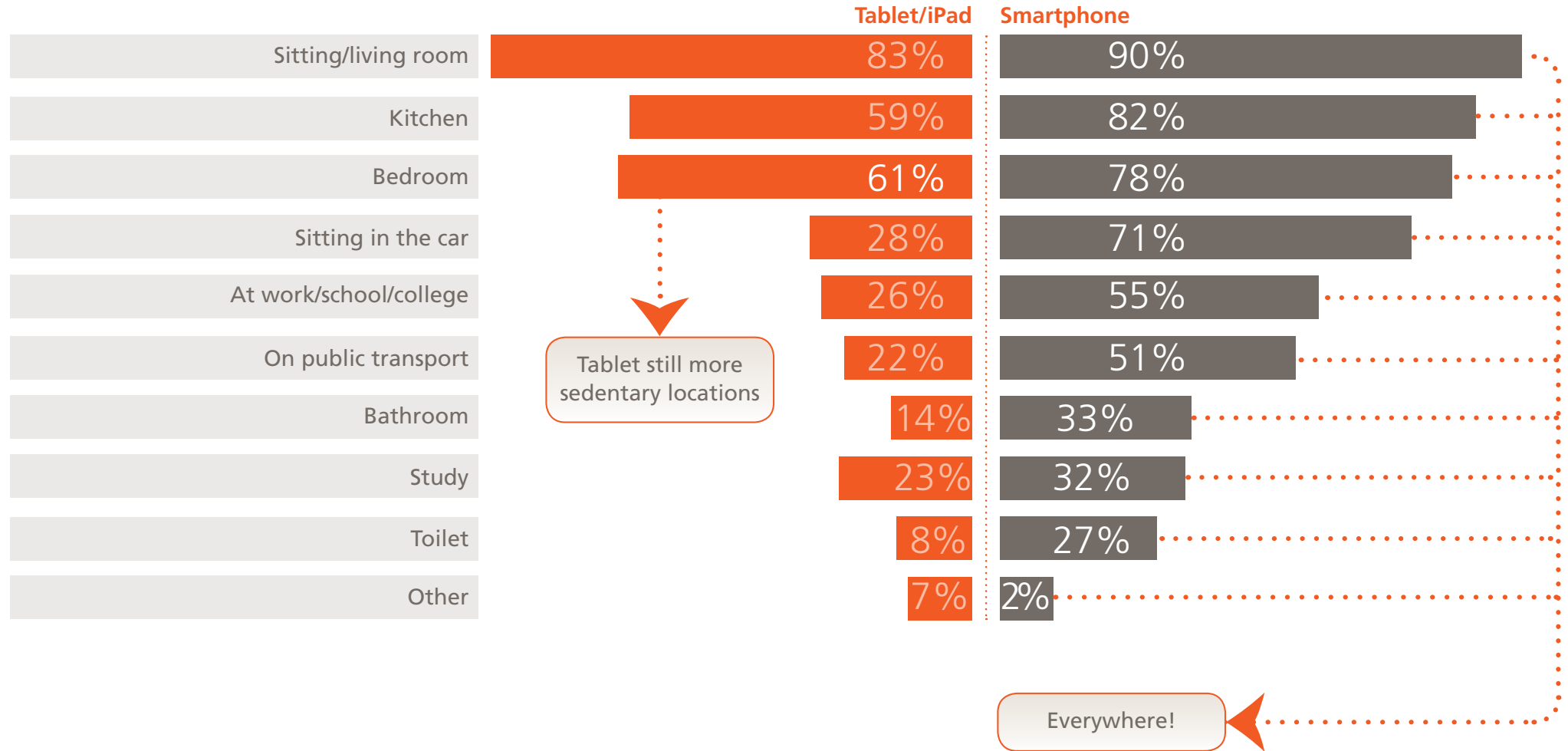
Key Themes

3. The Weird and Wonderful Locations of Usage



The Weird and Wonderful Locations of Usage

Base: All have tablet/iPad/All have smartphone



Q.16c And in which of the following places do you use your tablet/iPad?

Q.16d And in which of the following places do you use your smartphone?

Key Stats

With the increased usage of smartphone and tablet devices, the nation is now equipped to log on at every opportunity. This trend is leading to an increase in demand for online access on the go. Of those surveyed, 71% use their smartphone sitting in their car and 51% on public transport. While at home, it's not just the conventional spaces in the house, as 33% admit to using their smartphone in the bathroom, 78% in the bedroom and 27% while on the toilet.

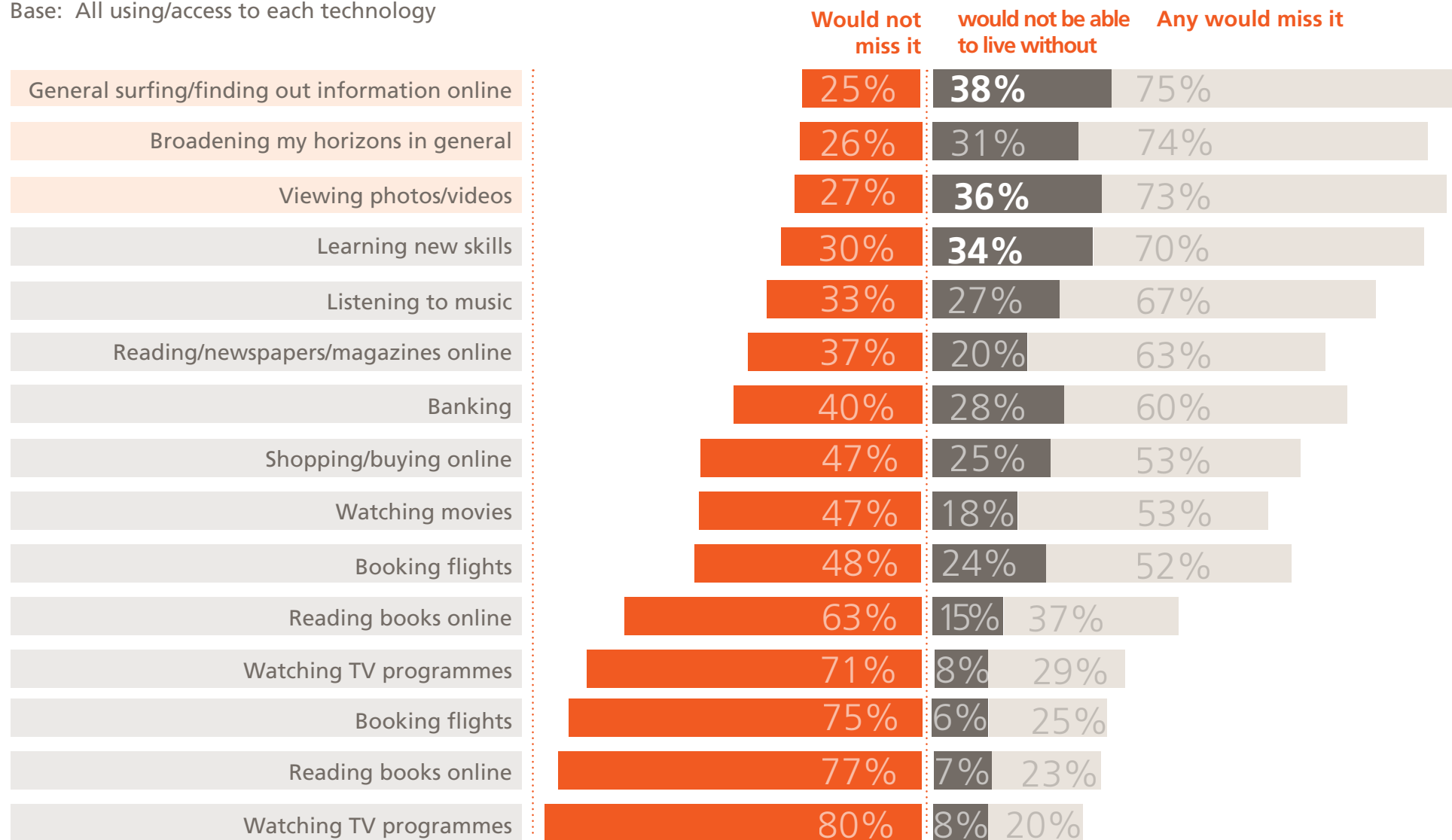
Key Themes

4. Reliance on Technology for Everyday Life



Mobiles, laptops and TV would be missed most. However, 2 in 3 would miss their home broadband.

Base: All using/access to each technology

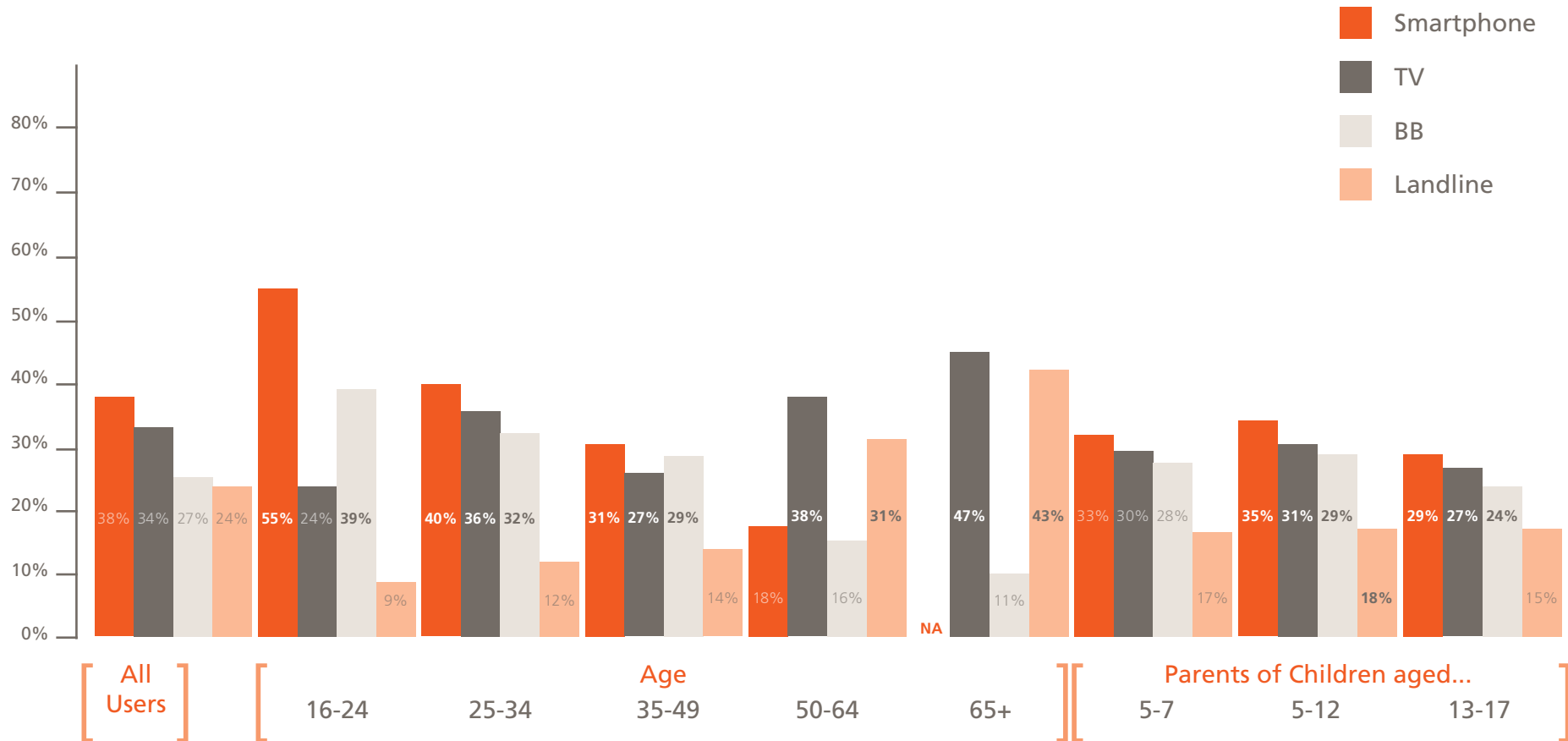


Q.15

If you were no longer able to use ...lpad/portable MP3 player please indicate how you would feel about each?

Offering all 4 products caters for all lifestages in this modern age

% would not be able to live without each product



NA = base too small

Have you ever ...?

Searched online to diagnose symptoms when you feel ill



63% of
25-34s

Searched online to diagnose symptoms when your children feel ill



56% of parents with children
5-12 years

Searched online for help with DIY



37% of
males

Searched online when having a mobile phone problem



49% of
smartphone users

Online is our encyclopaedia for life

Have you ever ...?

Apologised via text for not calling



65% of
16-34s

Called or texted someone you knew you shouldn't have when drunk



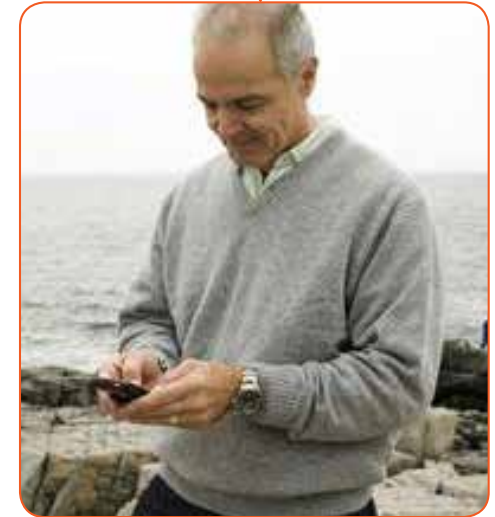
38% of
16-34s

Take/make calls/texts/emails while on a toilet



41% of
16-34s

Walked into something while checking your mobile



56% of
16-24s

We do crazy things

Have you ever ...?

Dropped my mobile
down the toilet



20% of
16-24s

Sent a text from a friends
phone without them knowing



37% of
16-24s

Checked my partners' mobile
phone texts



16% of
16-34s

Tried to guess my partners'
password to view emails



8% of
16-24s

And bold things!

Have you ever ...

56% amongst parents with children aged 5-12 years

Base: All adults 16+

	Total	Gender		Age					Mobile Type	
		Male	Female	16-24	25-34	35-49	50-64	65+	Any Smart-phones	Non Smart-phones
Base:	1000	472	528	161	207	280	210	142	488	453
	%	%	%	%	%	%	%	%	%	%
Walked into something while checking your mobile	29	29	30	56	40	32	14	6	41	21
Jumped into a swimming pool with your mobile in your pocket	2	3	2	10	2	1	0	-	4	1
Broke up with a girlfriend/boyfriend/partner via text	6	7	6	19	11	4	1	1	10	4
Broke up with a girlfriend/boyfriend/partner via email	2	2	2	5	4	1	0	-	3	0
Apologised via text for not calling	40	39	42	66	64	44	20	5	59	28
Sent an email you didn't mean to or want to by hitting 'Reply All'	17	16	17	24	25	20	9	3	27	9
Sent an email in the heat of the moment and regretted the tone afterwards	18	16	20	27	30	20	8	2	29	9
Woke or made calls, texts, or emails while on the toilet	23	25	22	45	38	22	9	2	36	13
Searched online to diagnose symptoms when you yourself feel ill	43	39	47	46	63	53	28	13	60	31
Searched online to Diagnose symptoms when your children feel ill	30	24	35	16	41	48	21	9	41	23
Searched online to help with DIY	35	37	32	29	49	48	24	12	48	26
Searched online when you have a problem with your mobile phone`	31	32	30	48	45	37	16	3	49	17
Checked my partners' mobile phone texts	10	9	12	15	17	13	5	1	16	6
Checked my partners' email	7	5	9	9	11	9	4	1	10	5
Called or texted someone you knew you shouldn't when drunk	20	22	18	39	36	19	5	-	32	10
Checked your children's mobile phone texts	8	5	10	1	10	17	4	-	11	5
Sent a text from a friends phone without them knowing	12	14	10	37	17	10	1	-	18	8
Dropped my mobile phone down the toilet	11	9	13	20	16	13	5	2	16	8
I have tried to guess my partners' password to view emails	4	3	4	8	3	5	1	1	5	2

Q.42

Q.42 Thinking back, honestly have you ever...

Have you ever ...

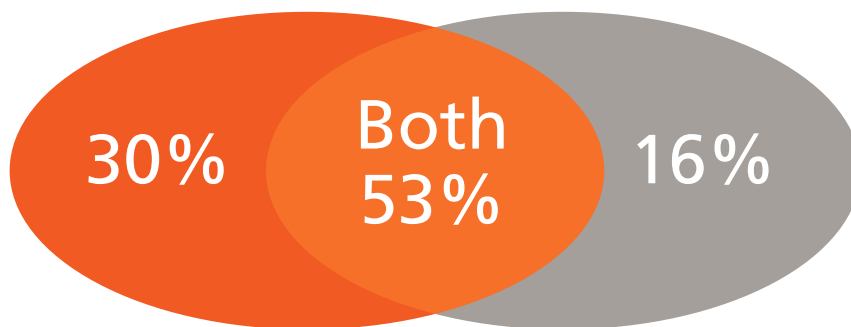
Base: All adults 16+

Social Class	Total	People in HHold					Parent of Child Aged...			
		1	2	3	4	5+	5-12 yrs	13-17 yrs	Any of these	None of these
Unweighted	1000	147	285	174	230	164	243	149	315	685
Searched online to diagnose symptoms when you yourself feel ill	43	23	35	53	50	53	55	46	53	38
Apologised via text for not calling	40	24	33	47	47	54	49	38	46	38
Searched online to help with DIY	35	22	29	40	43	40	48	40	46	29
Searched online when you have a problem with your mobile phone	31	18	24	34	39	39	38	34	36	28
Searched online to Diagnose symptoms when your children feel ill	30	9	19	35	45	44	56	46	52	19
Walked into something while checking your mobile	29	19	24	32	35	38	35	29	32	28
Take or made calls, texts, or emails while on the toilet	23	6	16	29	33	31	30	26	28	21
Called or texted someone you knew you shouldn't when drunk	20	8	16	24	24	28	21	18	20	20
Sent an email in the heat of the moment and regretted the tone afterwards	18	10	16	20	22	21	22	24	21	16
Sent an email you didn't mean to or want to by hitting 'Reply All'	17	5	14	21	20	23	22	24	22	14
Sent a text from a friends phone without them knowing	12	3	8	17	16	16	11	6	10	13
Dropped my mobile phone down the toilet	11	7	8	11	15	15	15	13	13	10
Checked my partners' mobile phone texts	10	1	7	11	13	21	18	15	16	8
Checked your children's mobile phone texts	8	-	1	8	11	21	23	35	24	-
Checked my partners' email	7	1	5	10	10	9	10	8	10	5
Broke up with a girlfriend/boyfriend/partner via text	6	3	4	6	8	12	6	4	6	7
I have tried to guess my partners' password to view emails	4	2	3	3	6	5	5	7	6	3
Jumped into a swimming pool with your mobile in your pocket	2	-	2	3	3	3	1	2	1	3
Broke up with a girlfriend/boyfriend/partner via email	2	0	1	2	3	2	2	1	2	2
None of these	34	58	43	27	25	15	21	28	24	38

Q.42

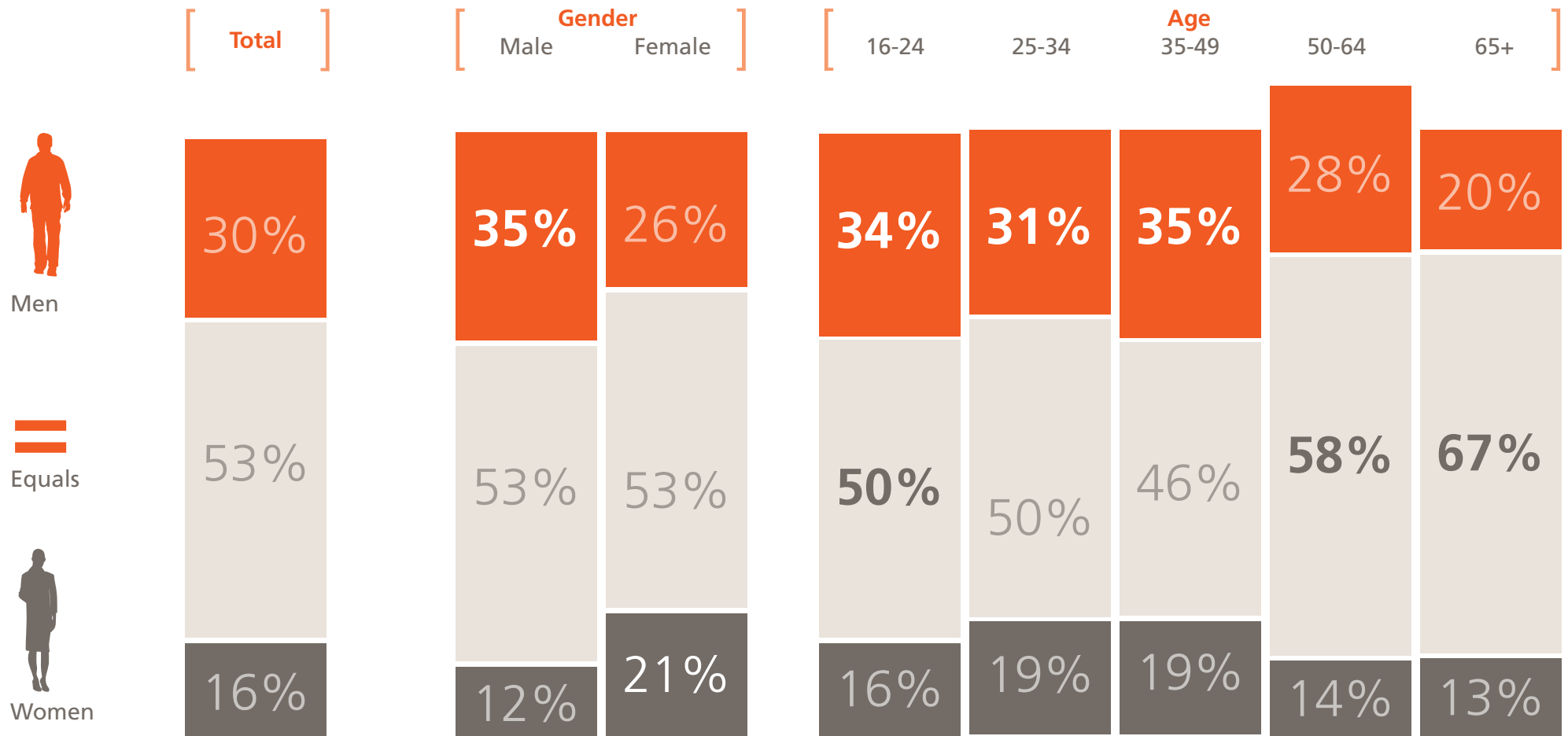
Q.42 Thinking back, honestly have you ever...

Who is more tech-savvy?



While half the population believe men and women are equally tech-savvy, almost twice as many see men as more tech-savvy vs women

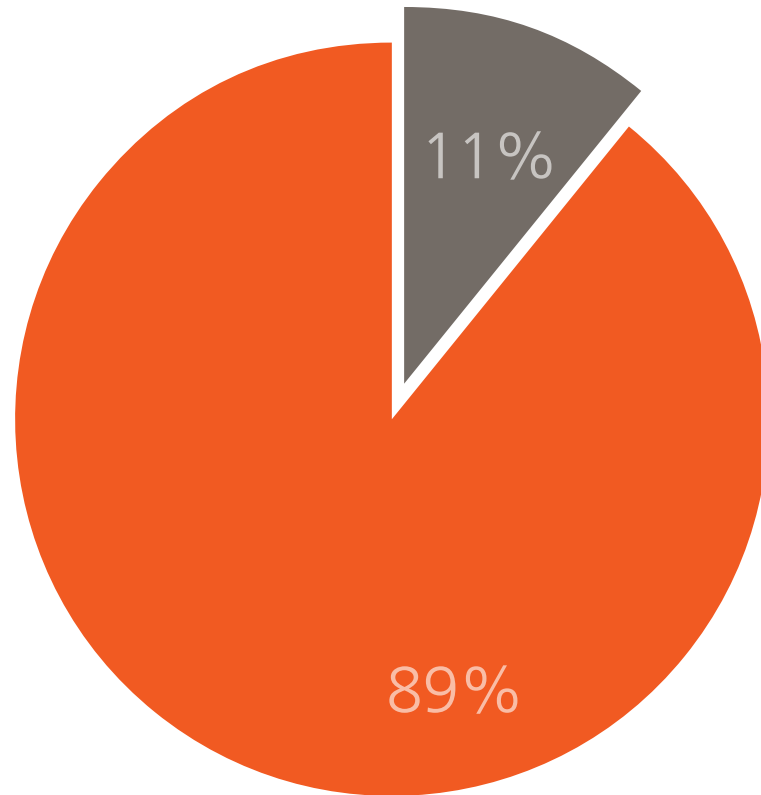
Base: All have tablet



Q.13 In your opinion, who is more tech-savvy; men or women?

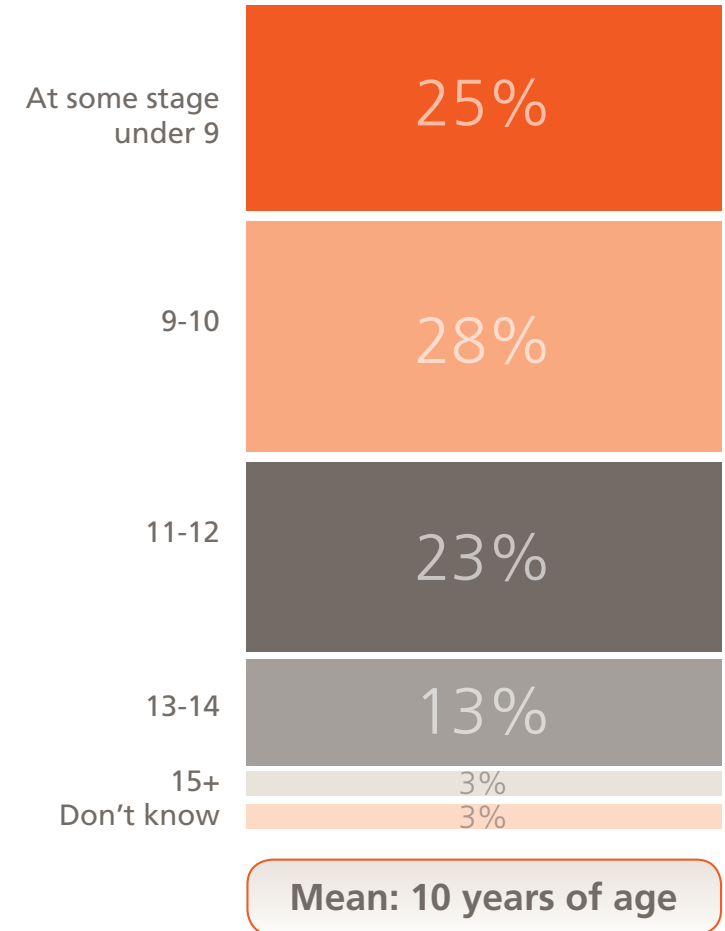
But who really knows the most about Technology? 9 in 10 agree that children know more about technology than their parents

Base: All adults 16+



Agree →

Age children begin to know more than their parents re technology



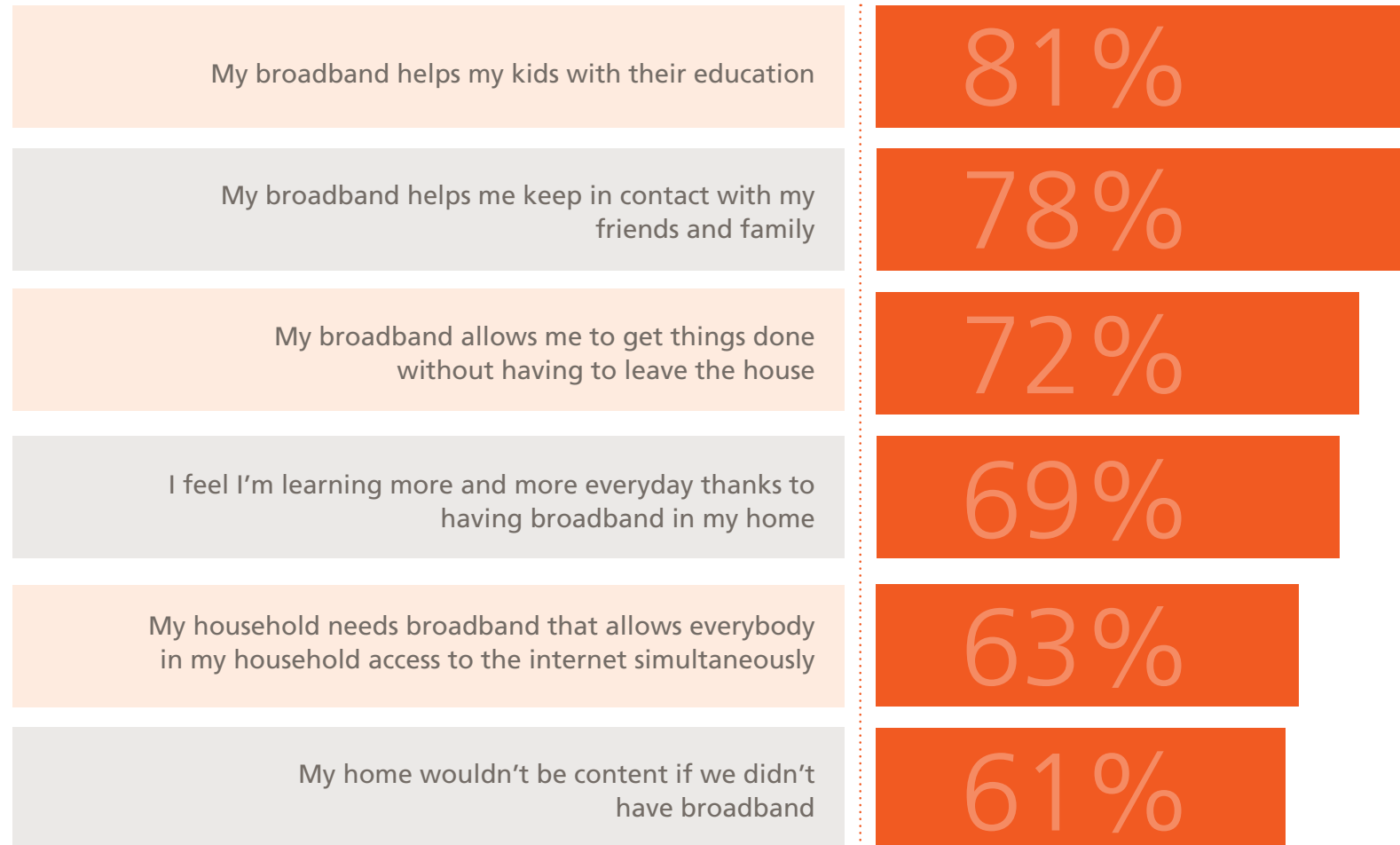
Q.12 → Some people say that children know more about technology than their parents, do you agree or disagree?

Q.12a → At what age do you think children begin to know more than their parents in terms of technology?

Home Broadband Enhances Home Connections

Base: All billpayers with broadband

Agree

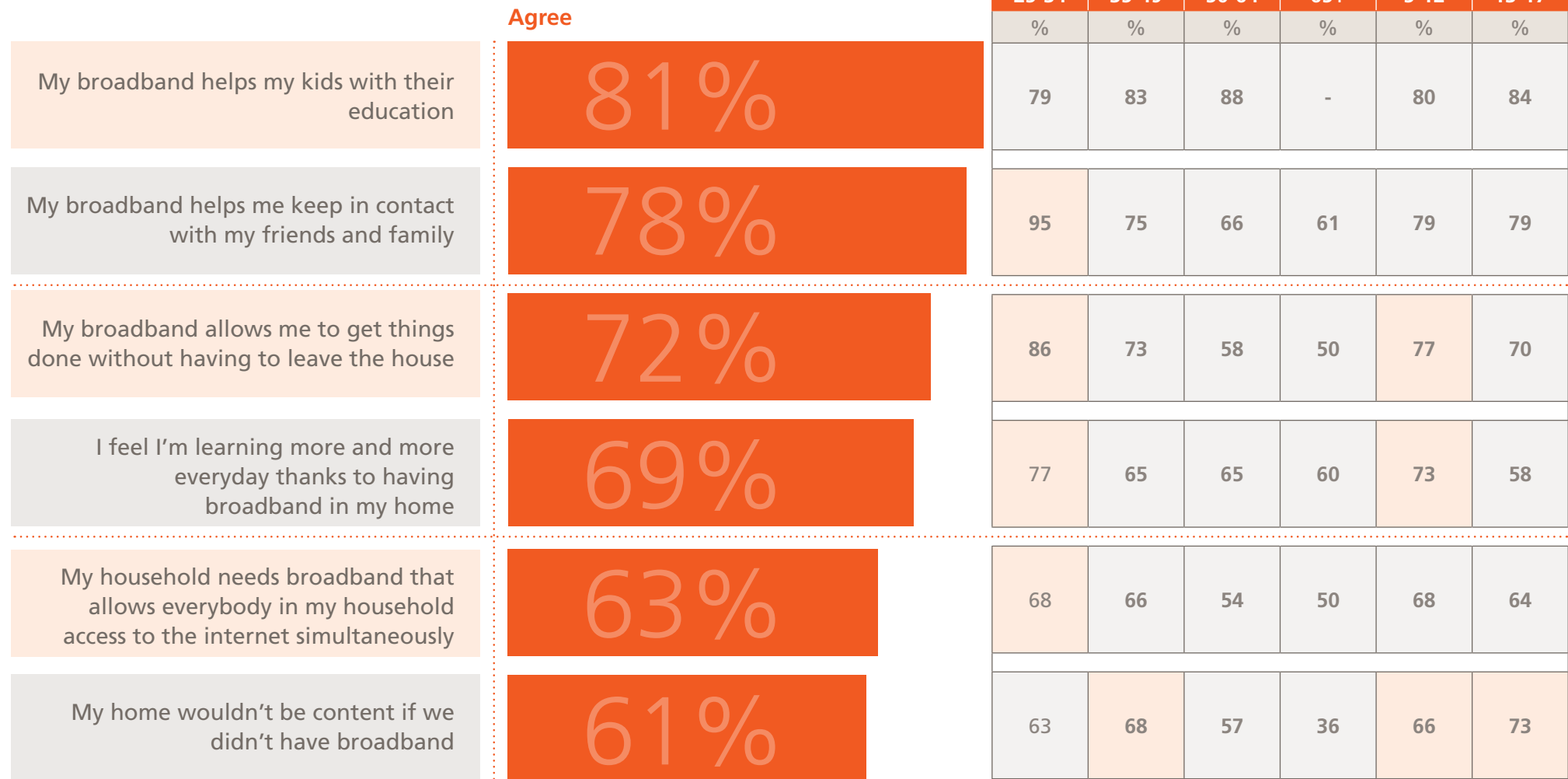


Q.41

Thinking about your home broadband internet access to what extent do you agree or disagree with the following statements people have made?

Home Broadband Enhances Home Connections

Base: All billpayers with broadband



Q.41 Thinking about your home broadband internet access to what extent do you agree or disagree with the following statements people have made?

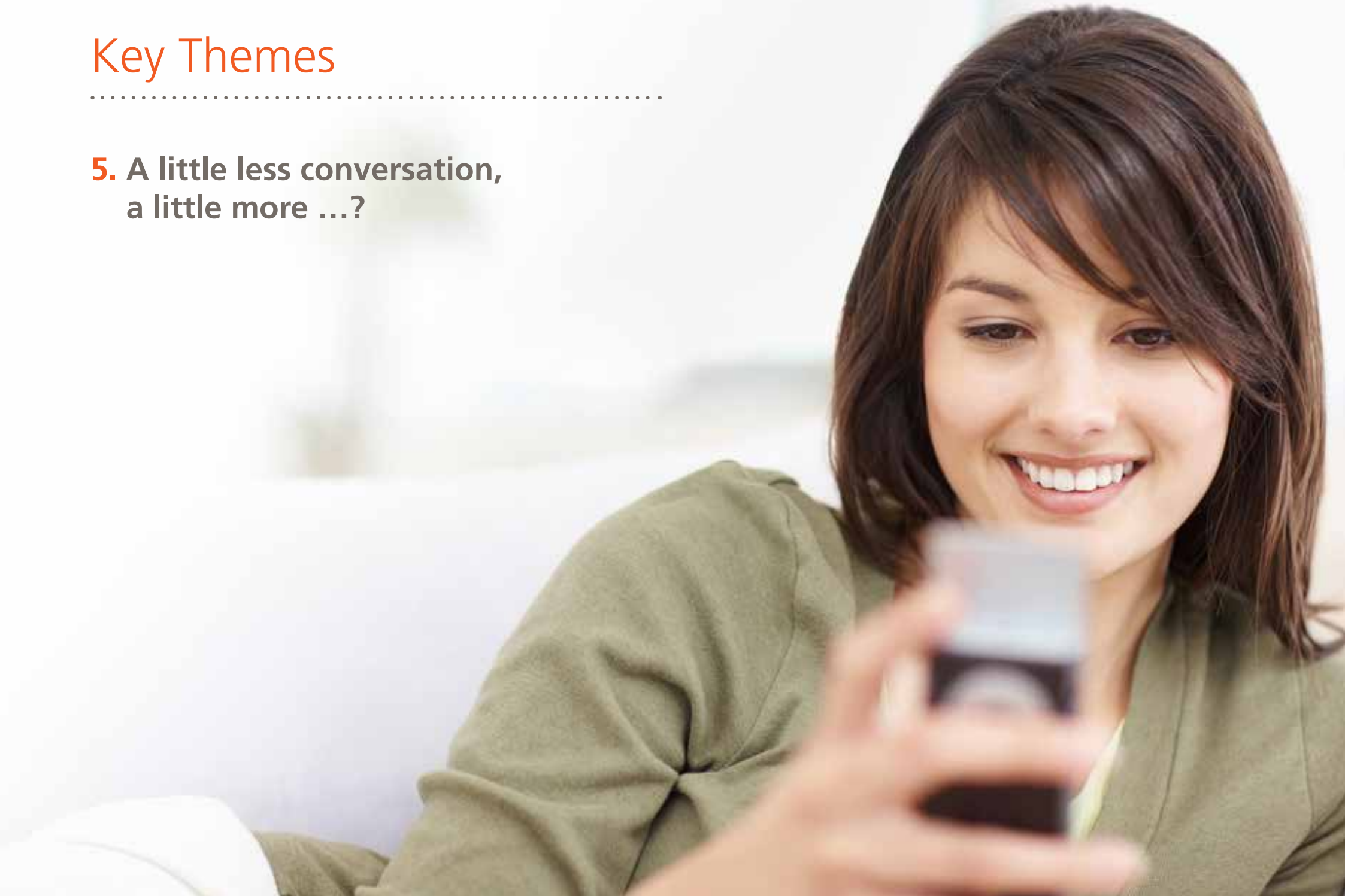


Key Stats

With increased usage of smartphones and the increased functionality on a single device, it is no surprise that 71% of us stated that we do not miss digital cameras and 63% of us can live without iPods and portable MP3 players. The reliance on technology has reached new levels and our insatiable appetite for information revealed that 37% of adults admitted to have searched online for DIY tips with 56% of parents searching online to diagnose symptoms when their children are ill. Overall twice as many of us believe that males are more tech savvy than females even though smartphone ownership is higher among females (52%) than males.

Key Themes

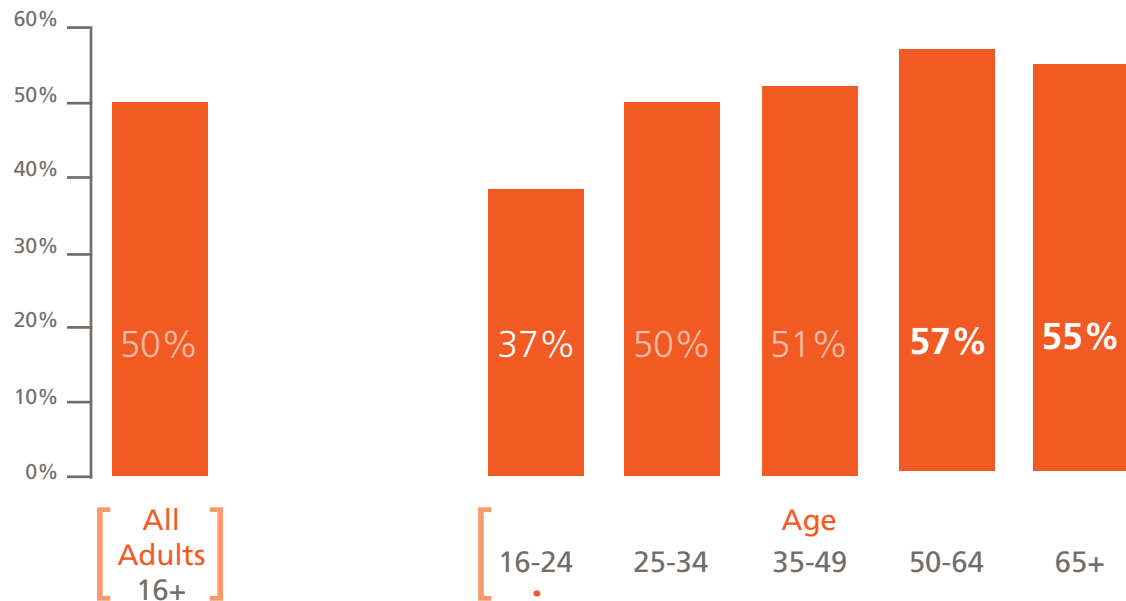
5. A little less conversation,
a little more ...?



Half of the population feel we have lost the art of conversation – but not 16-24s


Base: All adults 16+

% Agree: People have lost the Art of Conversation



	All Adults 16+	16-24	25-34	35-49	50-64	65+
Smartphone Users	49%	38%	51%	49%	60%	N/A
Non Smartphone Users	54%	32%	51%	54%	56%	58%

For 16-24s the 'conversation' is continuing, it is just that the 'art' has changed.

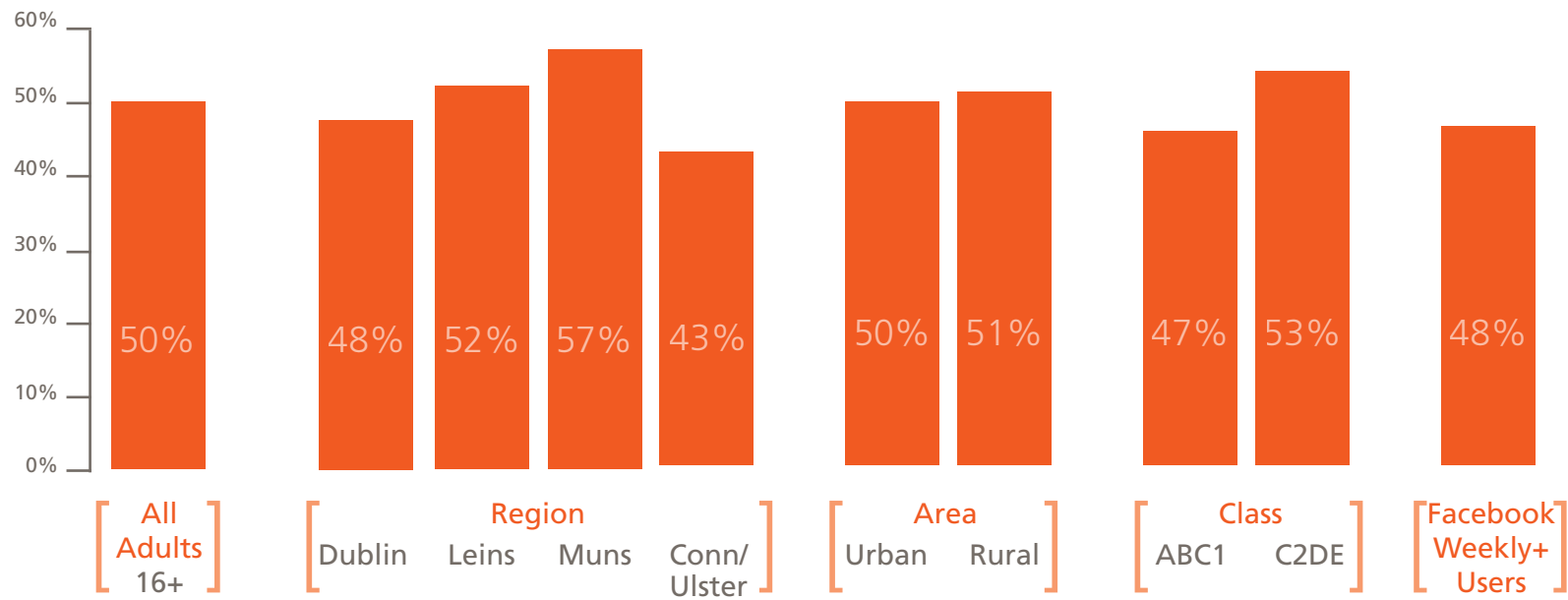


More age related than smartphone ownership

We have lost the Art of Conversation' x Key Cohorts

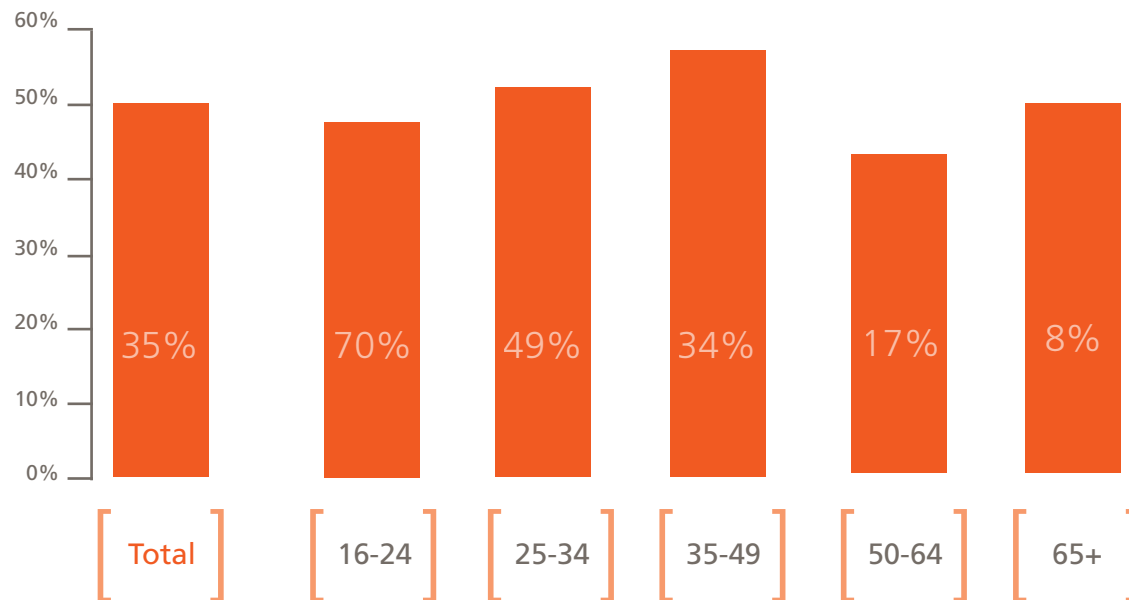
Base: All adults 16+ - 3,551

% Agree: People have lost the Art of Conversation



The Art of Conversation is Changing for Youth

% Agree: 'I prefer to text than call people'



Key Stats

The online rules of engagement continue to split opinion. Half the population believe that as a nation we have lost of the art of conversation. However, the younger generation in the 16-24 age bracket believe that the conversation is continuing but in a different way. 70% of 16 to 24 year olds now prefer to text than call.

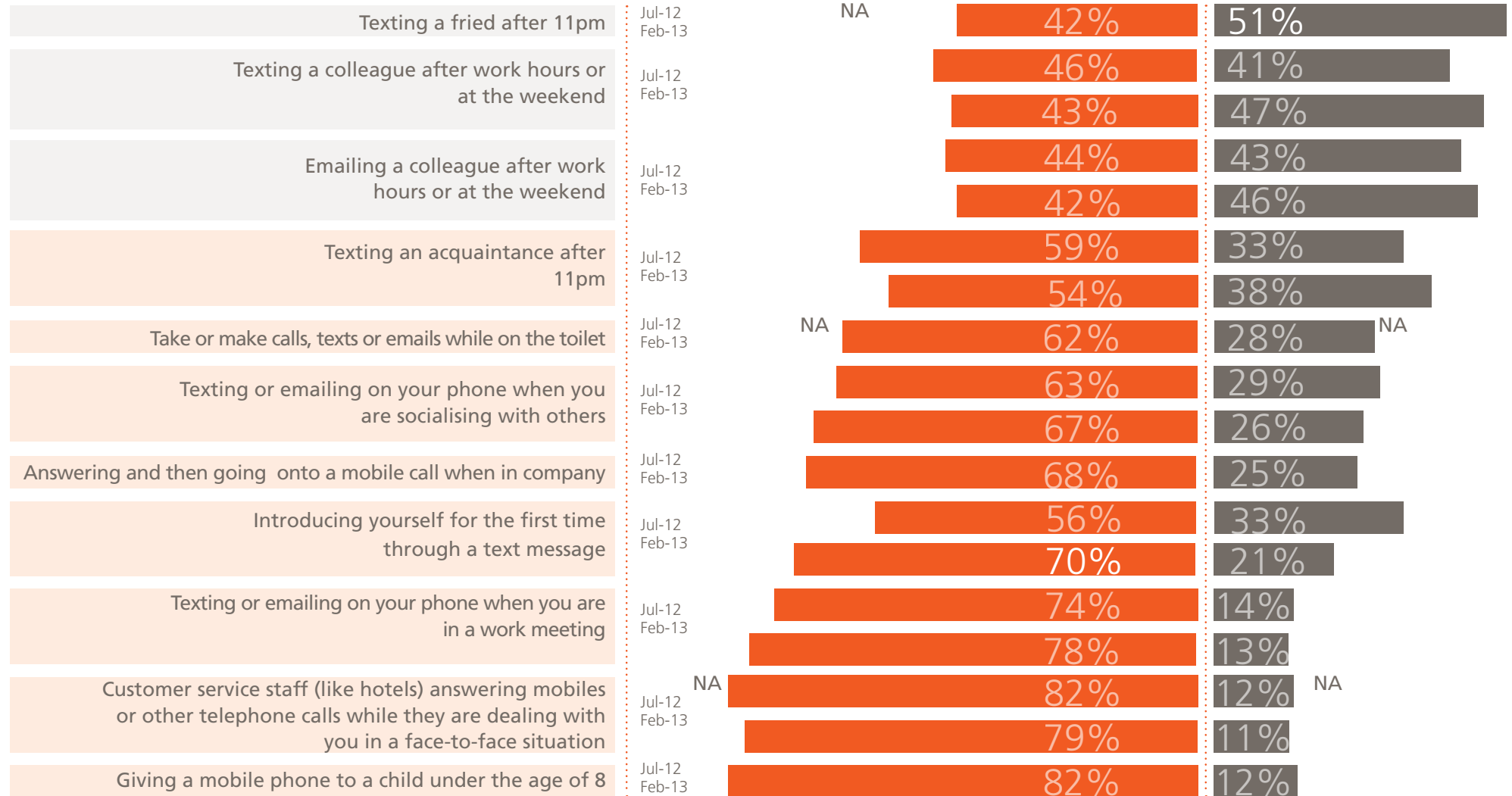
Key Themes

6. The Mobile Etiquette Debate Continues



A nation divided on certain aspects of Mobile/Smartphone Etiquette

Base: All adults 16+

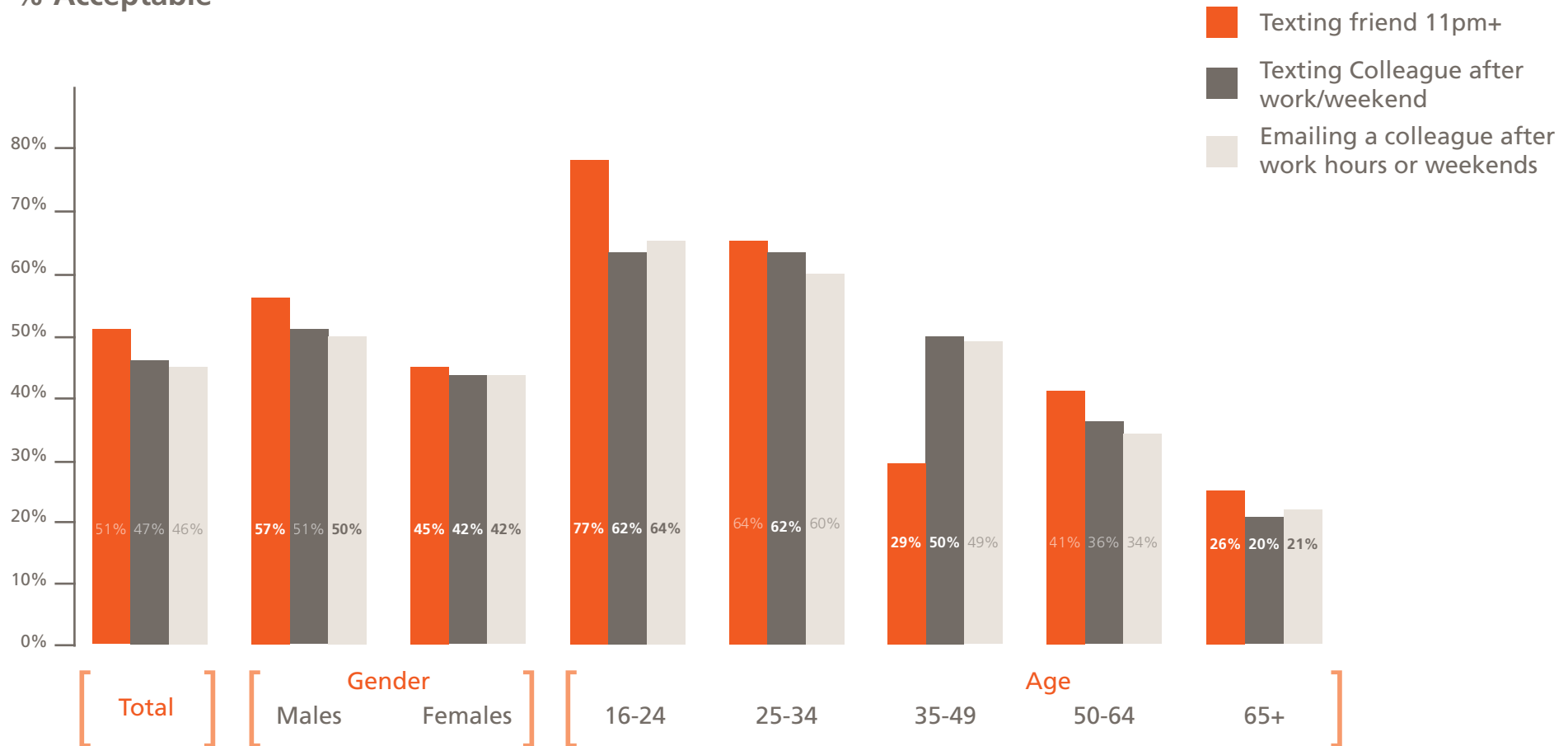


Q.23 To what extent is ... acceptable or unacceptable mobile or smart phone etiquette?



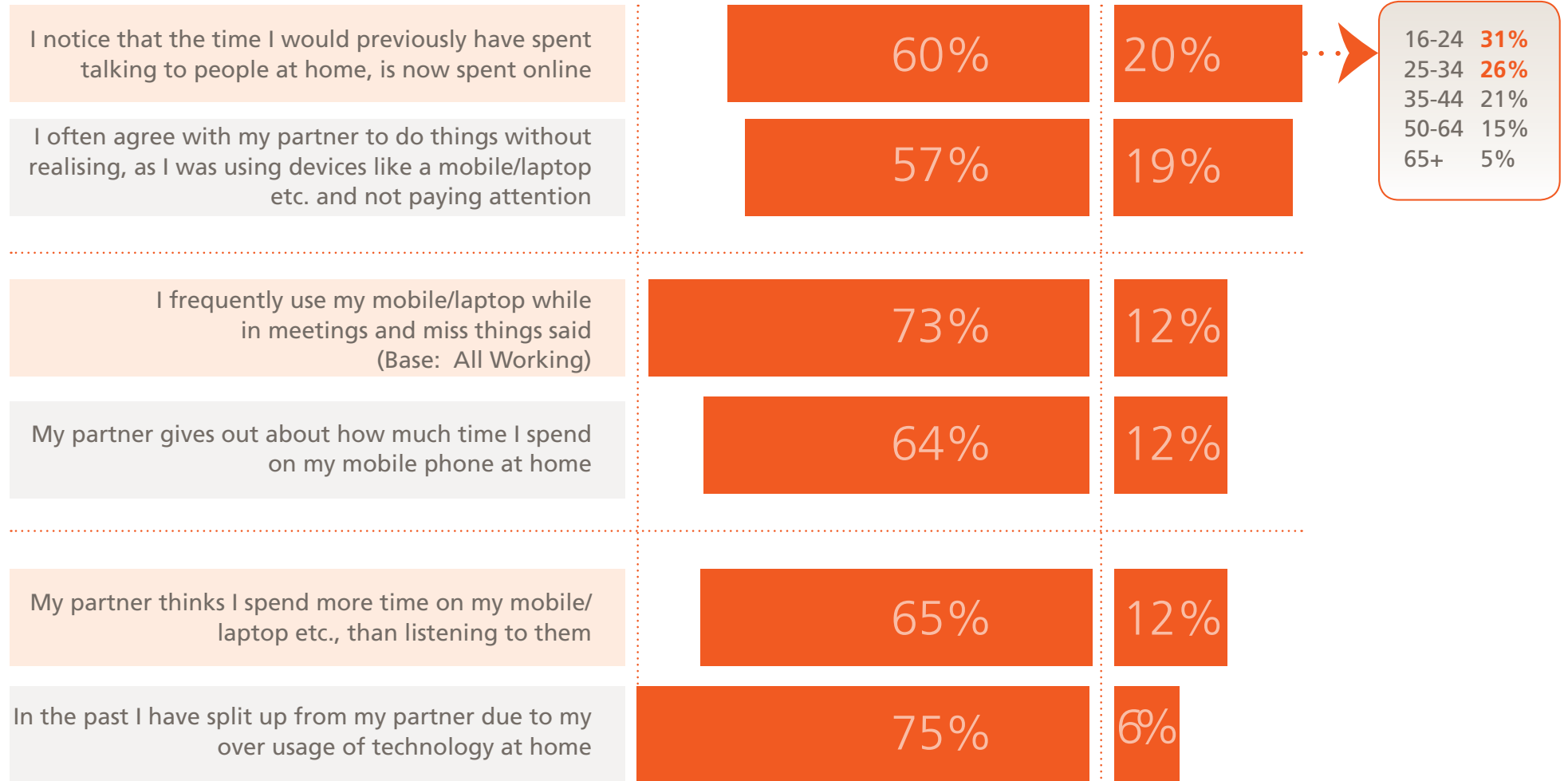
Males and Under 35s have a different etiquette – higher acceptability for late/weekend texting/ emailing – the traditional work/life boundaries breaking down

% Acceptable



Impact of technology on relationships

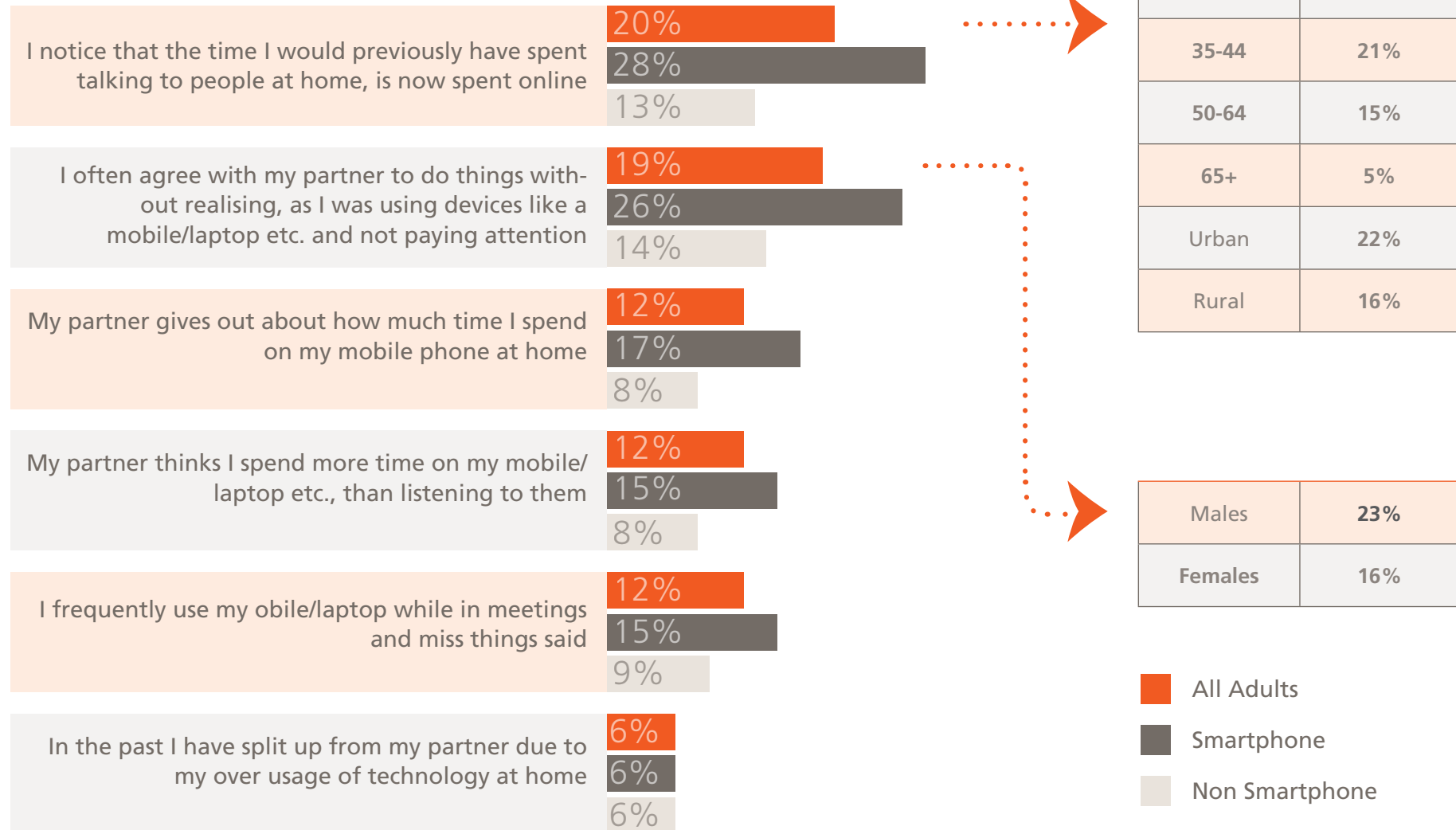
Base: All Adults 16+



Q.24 To what extent do you agree or disagree ...?

Smartphone users more consumed by technology- impacting on their relationships

Base: All Adults 16+



■ All Adults
■ Smartphone
■ Non Smartphone

Q.24 To what extent do you agree or disagree ...?

Key Stats

Meanwhile mobile and smartphone etiquette continues to divide the nation. The eHSS findings show that males and under 35's have a higher acceptability for late evening and weekend texting and emailing, leading to the breakdown of traditional boundaries between home and work life. 62% of those in the 25-34 age group believe it is acceptable to text a colleague after work or at the weekend. And it seems our digital habits are proving to be a distraction, with 19% of respondents admitting to having agreed to something without realising it while using a digital device.

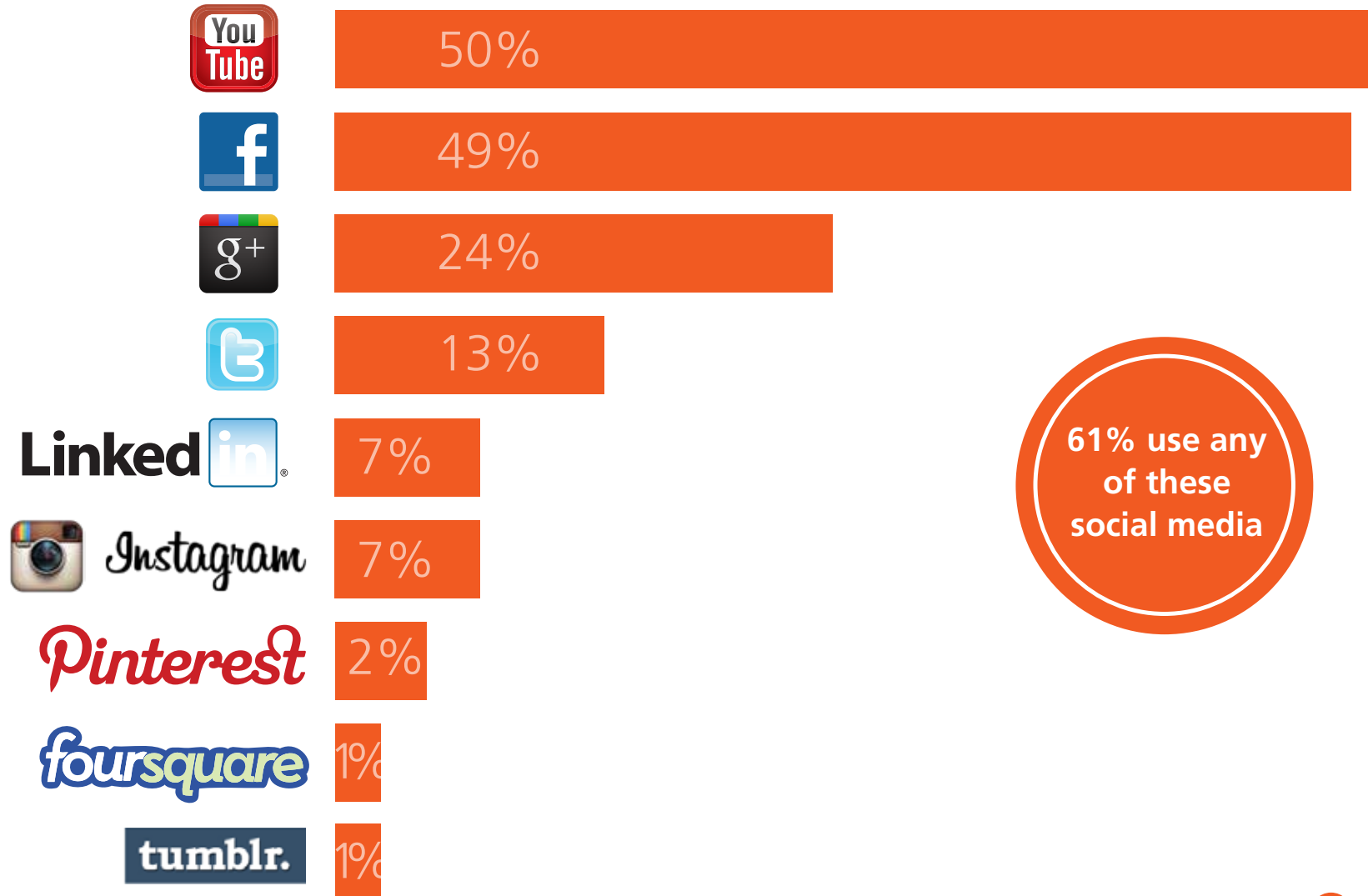
Key Themes

7. It's a virtual world,
with virtual friends.



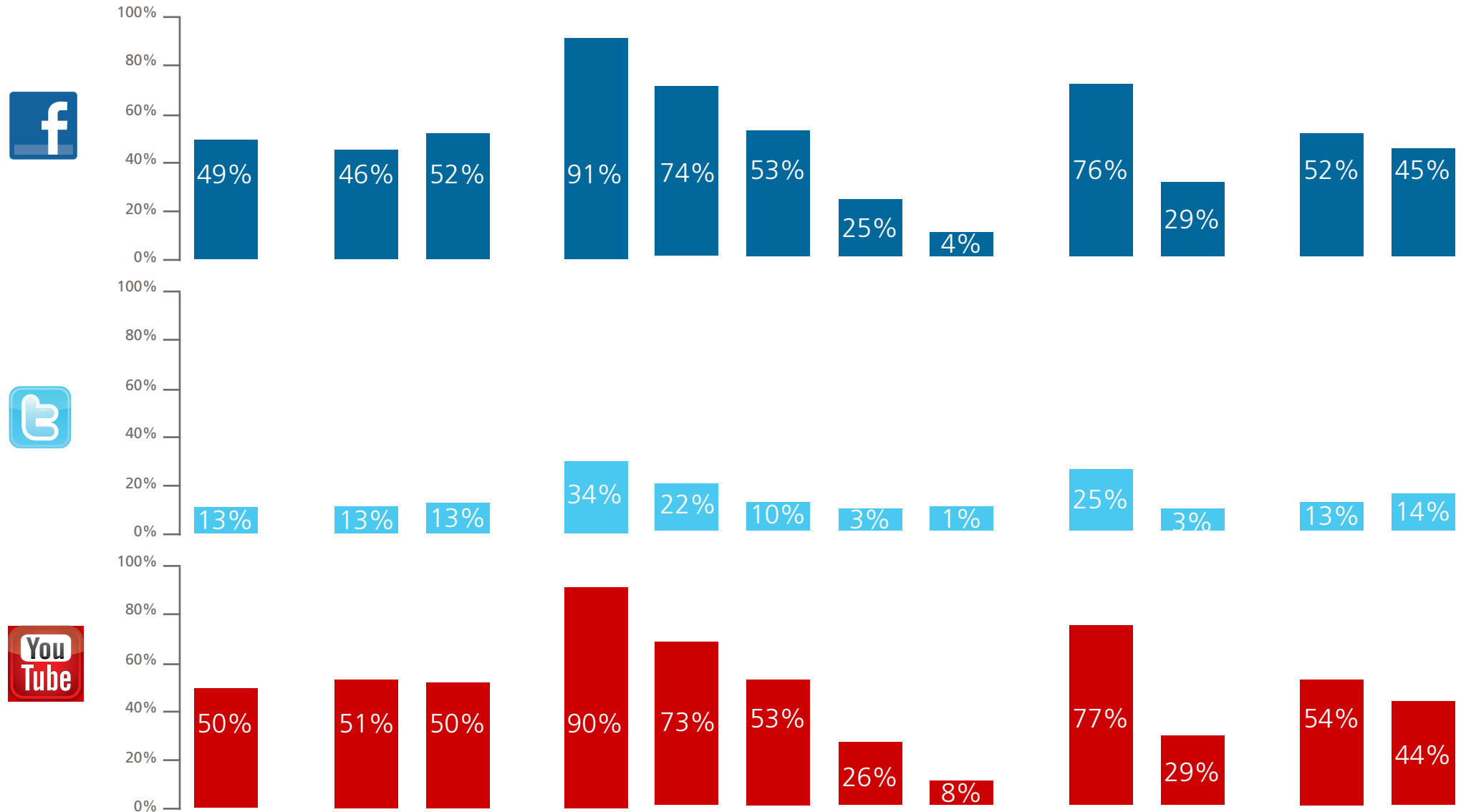
Social Media Usage Nowadays

Base: All Adults 16+



Social Media x Key Cohorts

Base: All Adults 16+



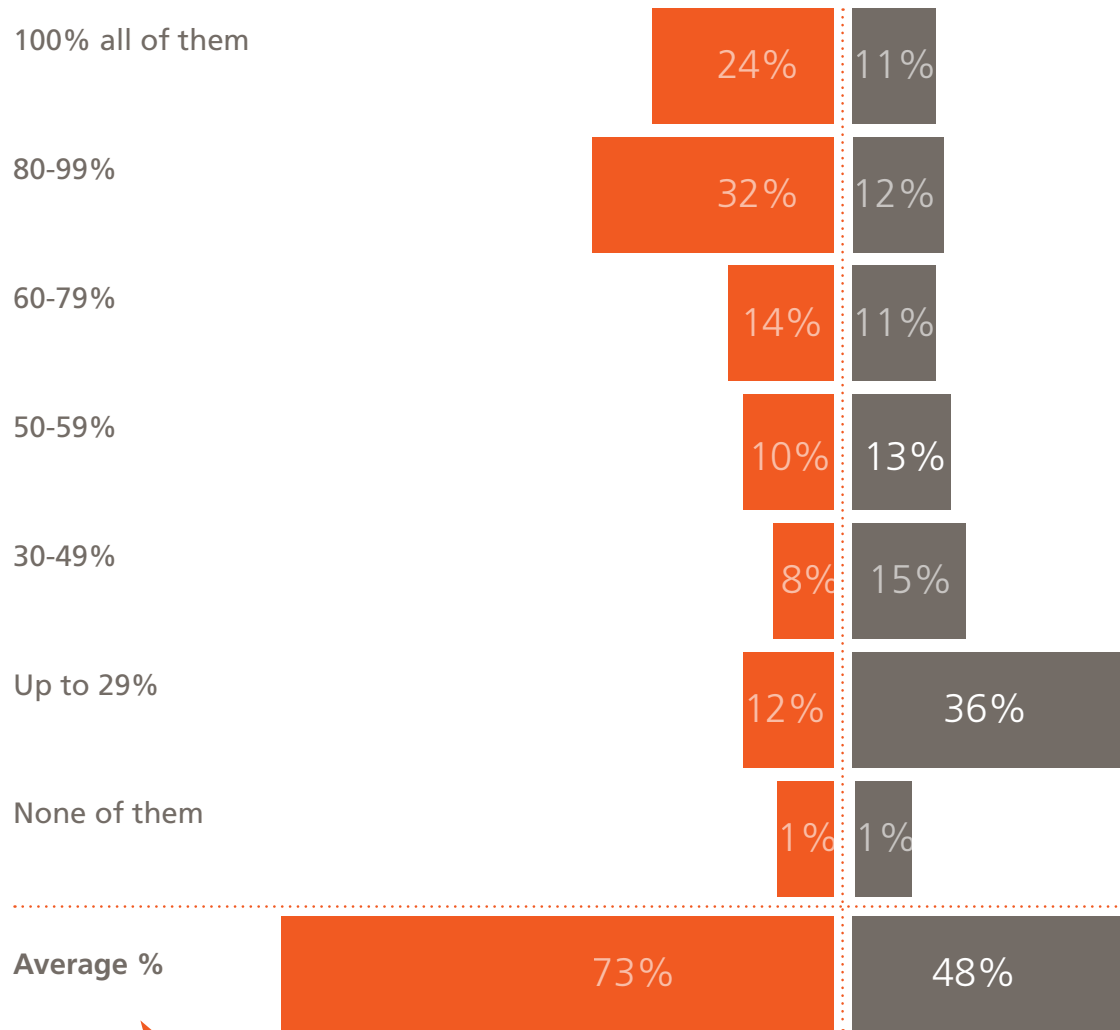
Q.25 Which of the following, if any, of these sites do you ever use nowadays?



Only half of Facebook friends are 'real'

Base: All Users

Amount of Facebook friends actually Met Amount of 'Real' Friends on Facebook



Average % of 'real' friends on Facebook increases with age

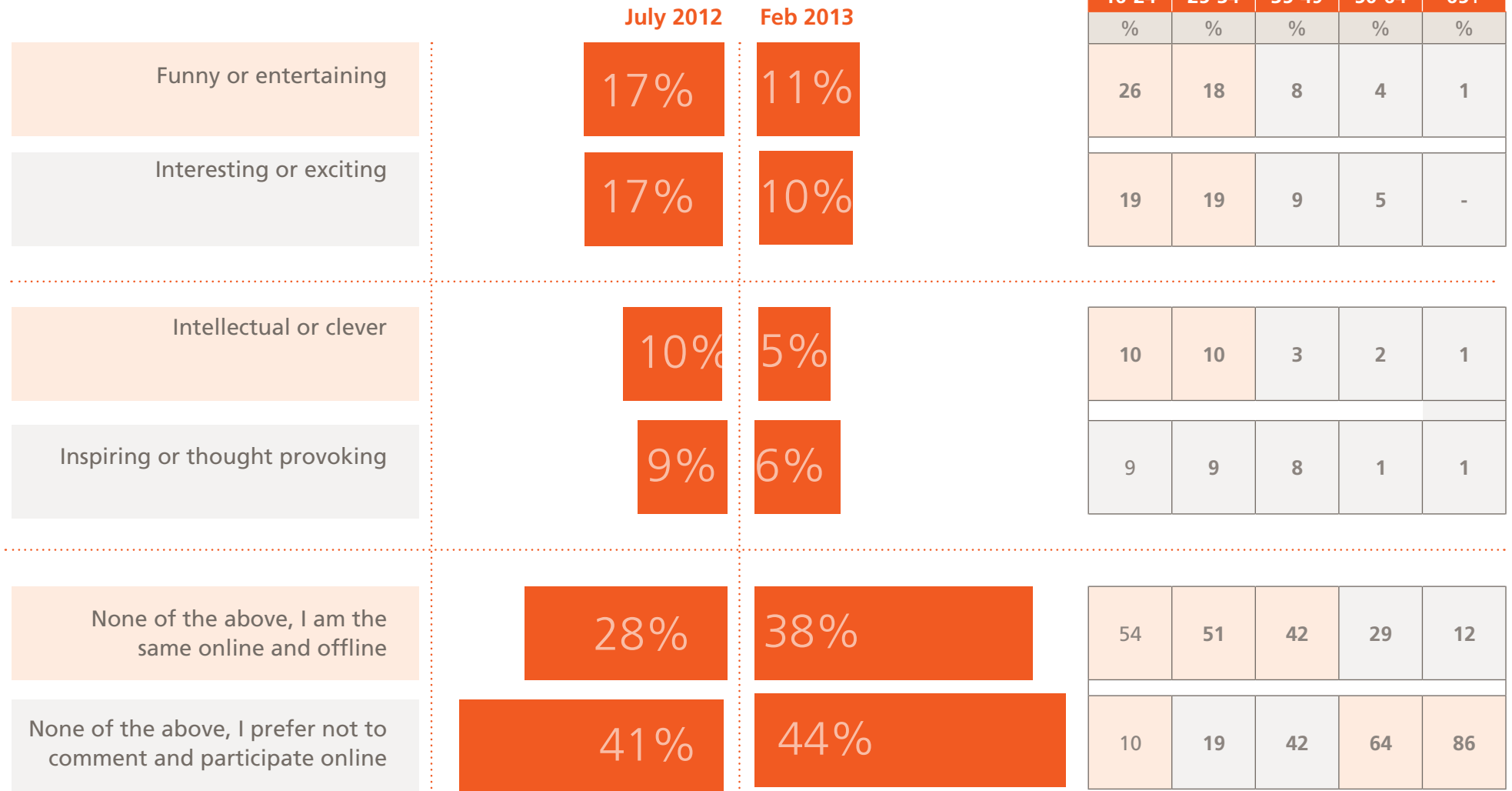
16-24	42
25-34	45
35-49	51
50-64	63

Q.30 Thinking about your Facebook friends or acquaintances, what percentage roughly have you actually met? Be honest!

Q.30a And what percentage would you consider to be 'real' friends?

Our online personas starting to match our offline ones

Base: All Adults 16+ - 1,000



Q.38 On social media sites do you try to be more

Key Stats

There is less of a divide between our on line and off line selves as social media usage is now part of everyday lives. 38% of respondents believe they are the same online and offline compared to 28% of respondents in the last report. Social media fatigue is also on the rise with 28% of those surveyed claiming that they are getting tired of social media channels such as Facebook and Twitter.

Thank You

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