RESEARCH
& INSIGHT

TechScape
2021

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behaviour&attitudes

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Key Themes 2021

Key themes

1.

The juggernaut of Smart TVs & wearable devices continues

2.

Hybrid remote working is the way forward, with Zoom being the main winner

3.

Smart Hubs are becoming the norm with a quarter of households having at least one

4.

We love TV streaming platforms and not just one will do

5.

Dublin & middleclass phenomenon emerging on the use of financial digital products

6.

The role & value of broadband is becoming increasingly important

7.

Our love of social media has been reestablished during the pandemic

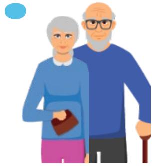
8.

Divided society as Dubliners and the middle class dominate tech

9.

Online shopping sees an acceleration in pre Covid trends

10.



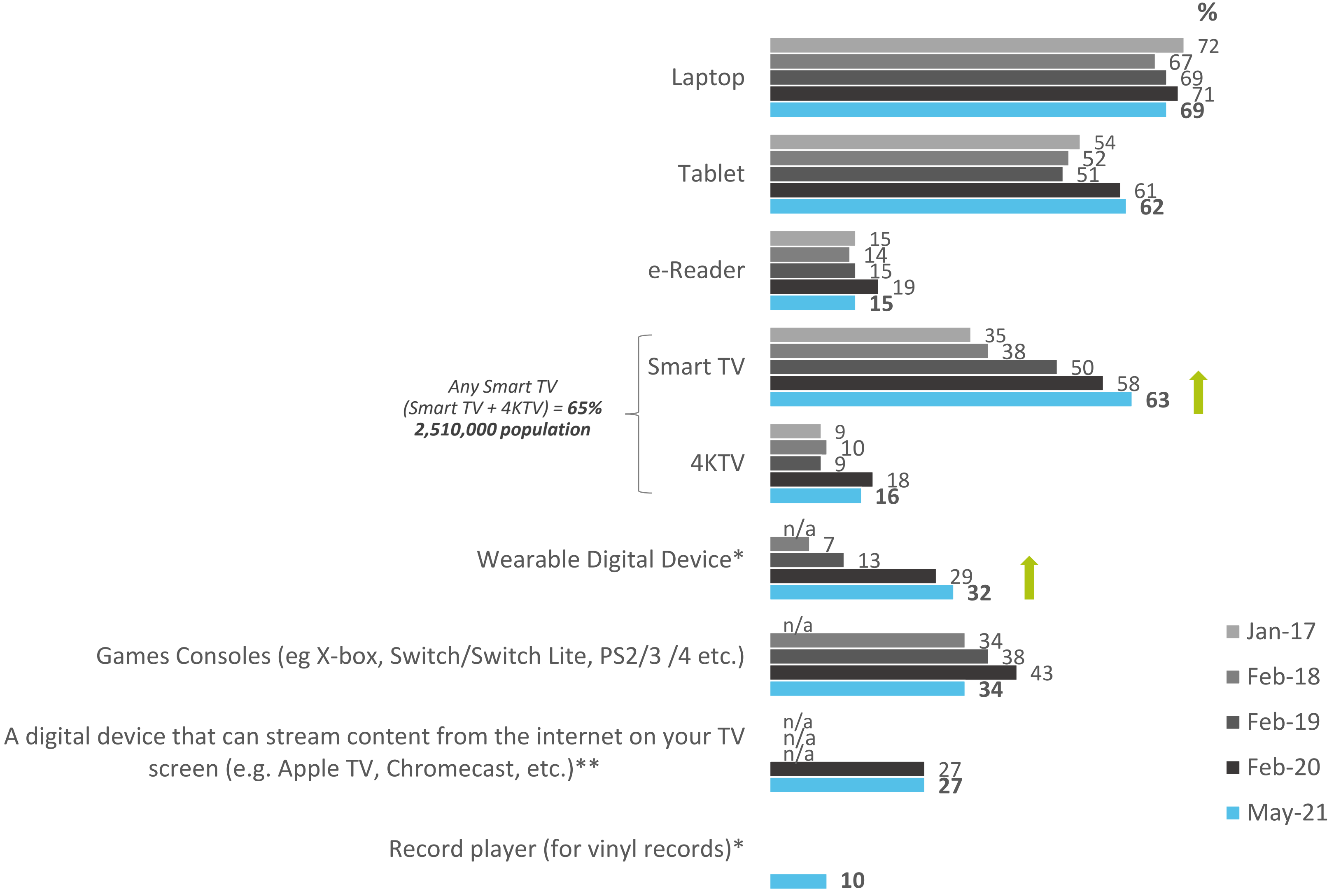
The older generation is in danger of getting left behind as almost half don't access the internet

Tech gear

Ownership of Smart TVs and Wearable Devices continues to grow in 2021

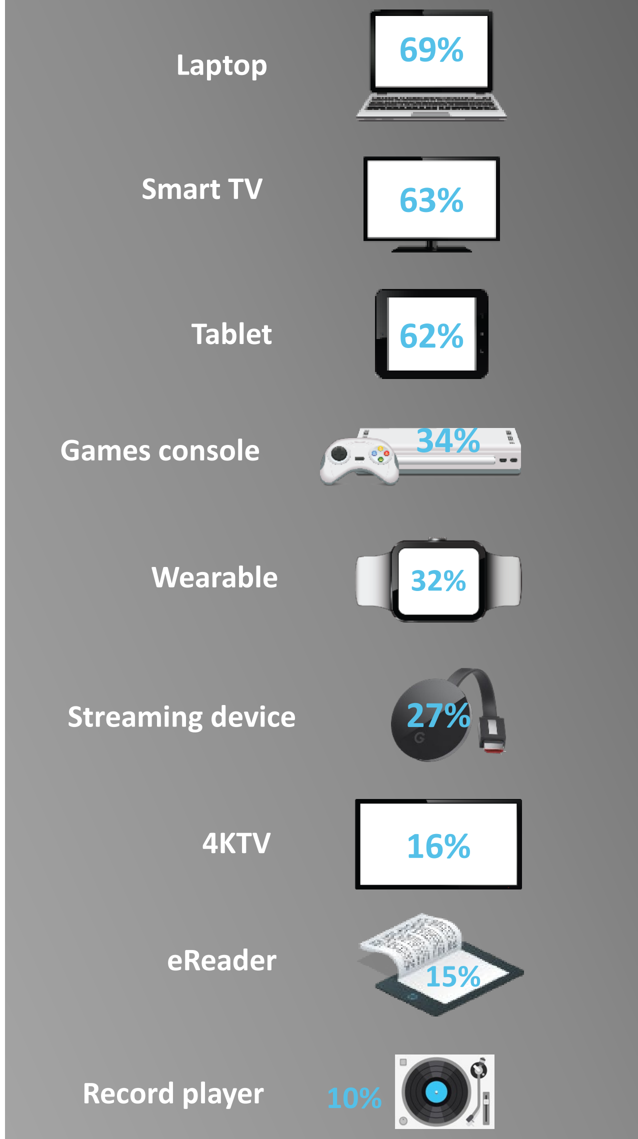
Base: All adults aged 16+ - 1,003

Devices in Home Trended



Any Smart TV (Smart TV + 4KTV) = ***65%***
2,510,000 population

2021 Totals



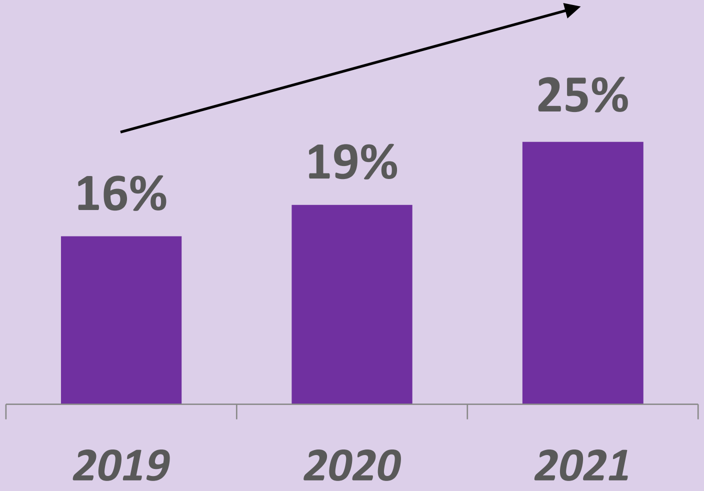
Which of the following devices are in your household?

**Added 2021*

Ownership of smart hubs is also on the increase

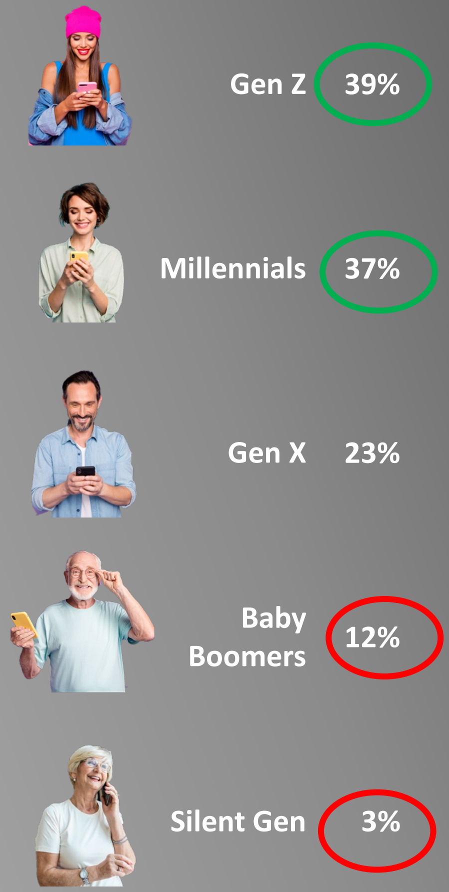
25%

has a smart hub/home assistant e.g. Alexa, Google Home, etc.



Ownership of smart hubs peaks amongst Generation Z and Millennials

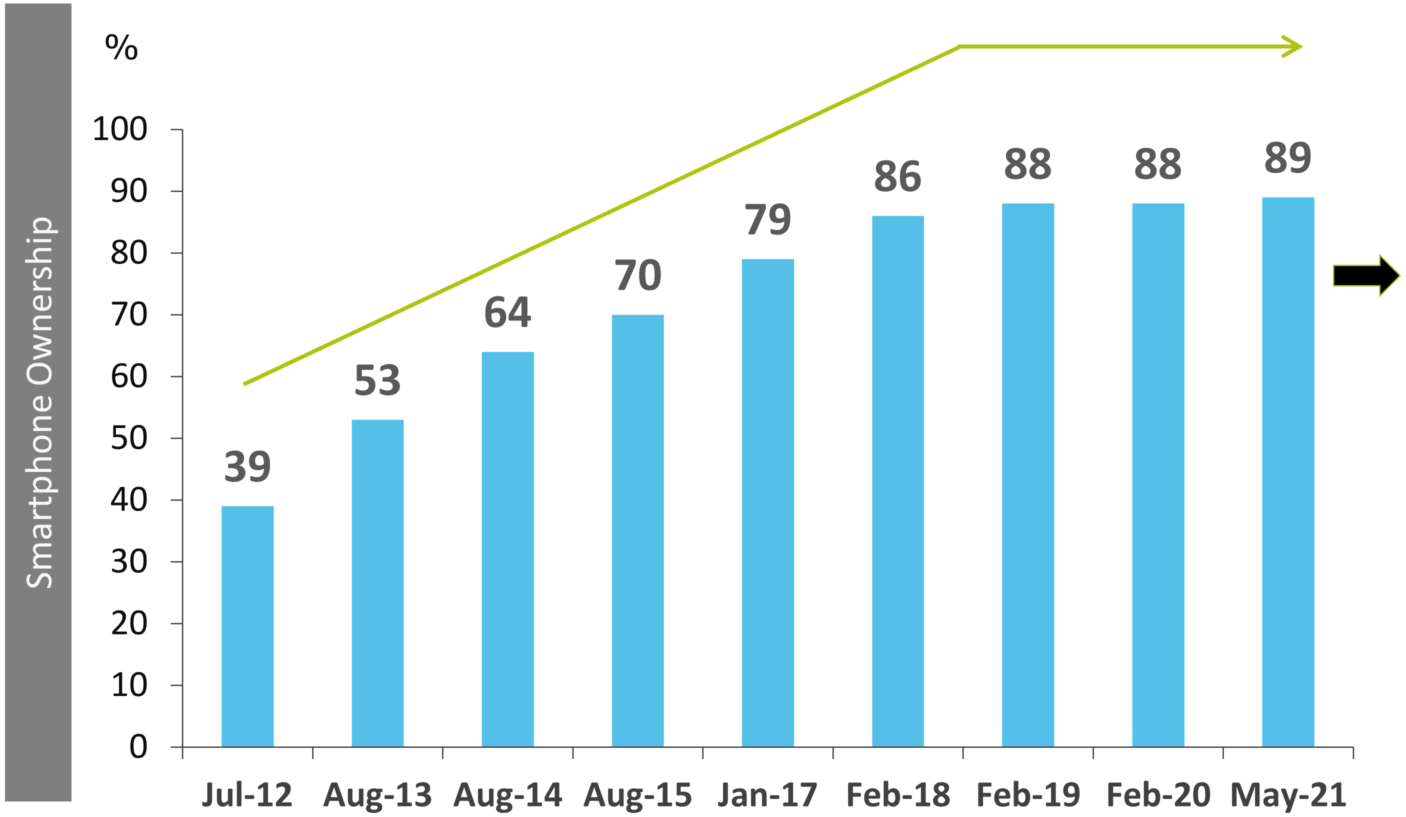
Generations

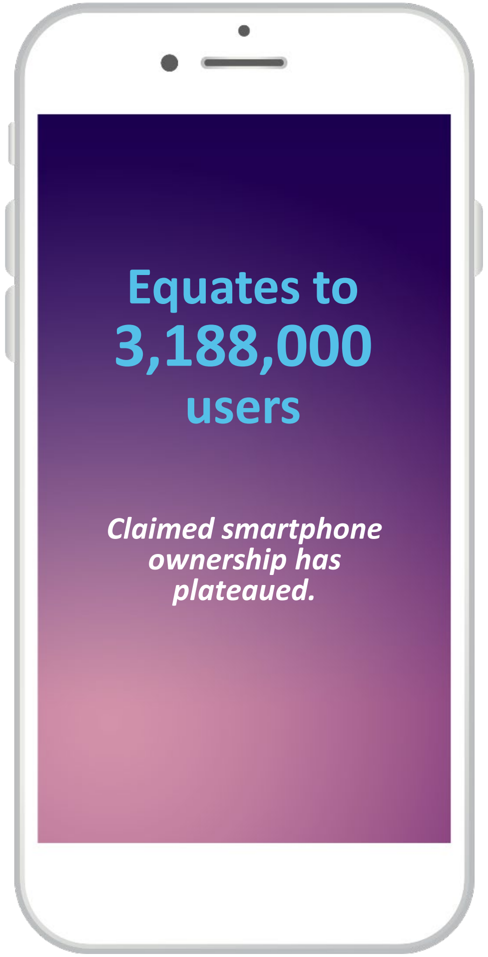


Which of the following devices are in your household?

Almost 9 in 10 mobile phone users have a smart phone:
40% among the silent generation (those aged 74 years+)

Base: All with mobile – 934

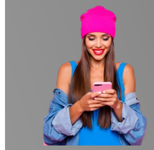
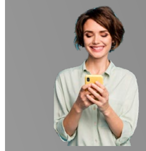
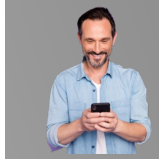
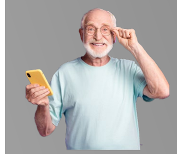




Equates to 3,188,000 users

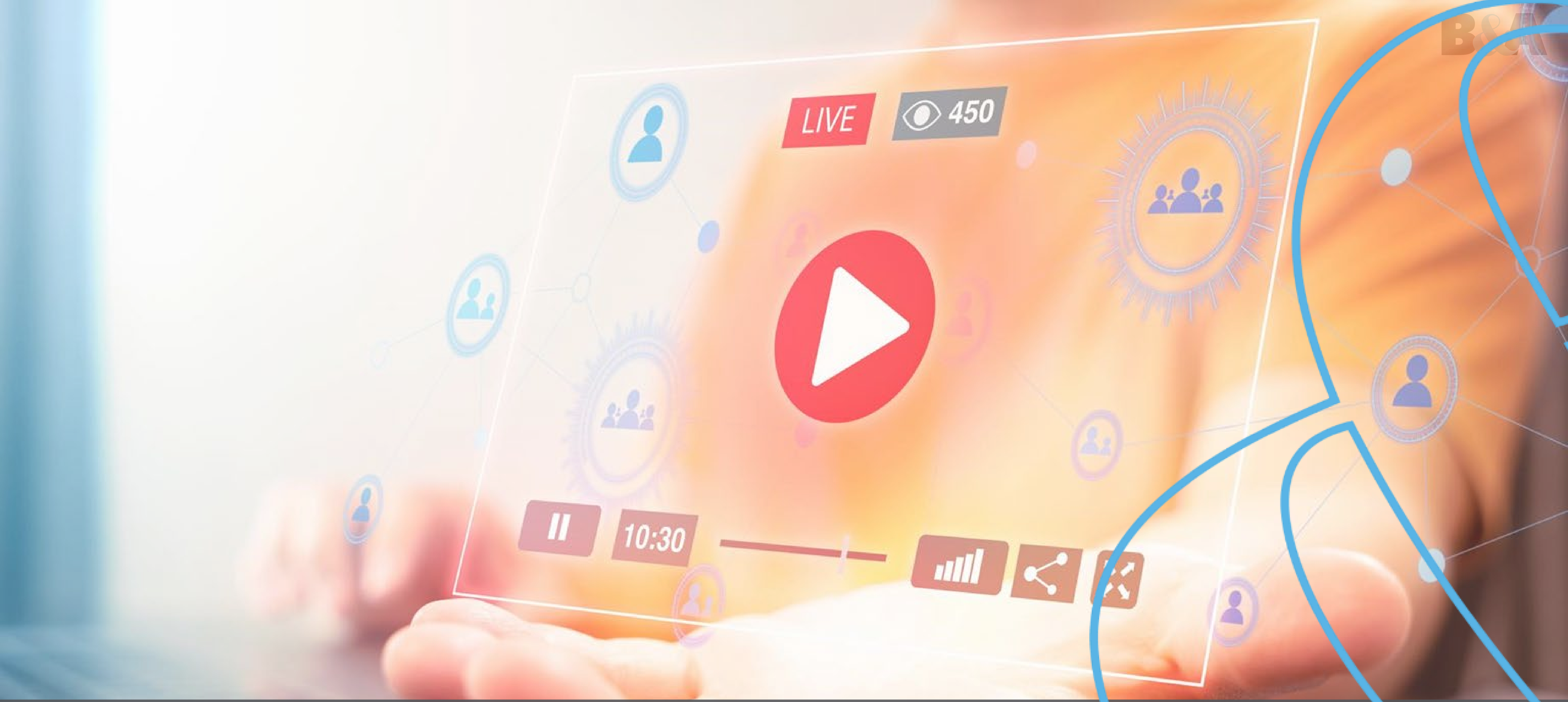
Claimed smartphone ownership has plateaued.

Generations

	Gen Z	100%
	Millennials	99%
	Gen X	97%
	Baby Boomers	78%
	Silent Gen	40%

Pre-January 2017 comparable data from eir Connected Living Survey 2015

Which of the following devices do you currently use?



A nation of streamers and bankers online (entertainment & comms)

B&A

No change in YOY daily internet usage as

(81%) **80%**

of all adults aged 16+ access the internet once a day or more often

33%

Of those 74 yrs+ (Silent Gen)

now access the internet once a day or more often

12% of population never access the internet

()=2020 data

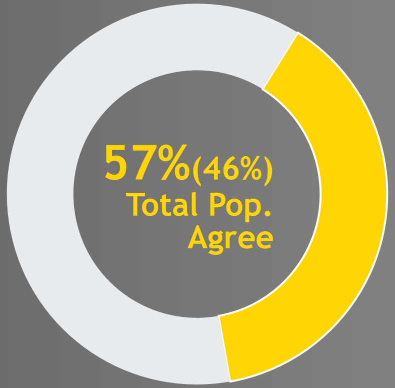
Generations

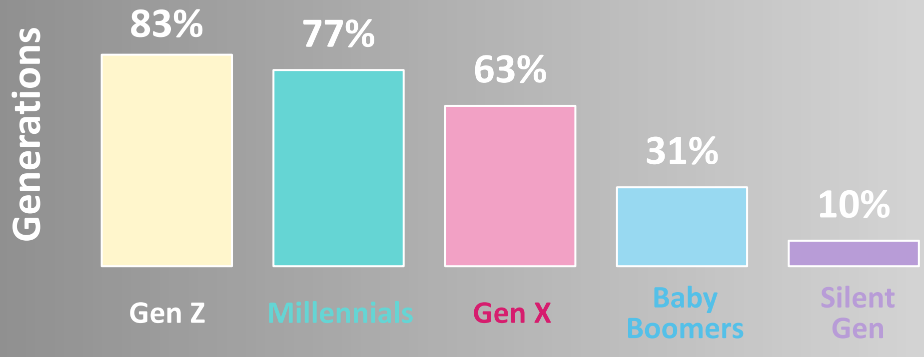
	Gen Z	100%
	Millennials	95%
	Gen X	89%
	Baby Boomers	62%
	Silent Gen	33%

The importance of broadband is continuing to grow and it is now more important than TV for GenZ, Millennials & GenX

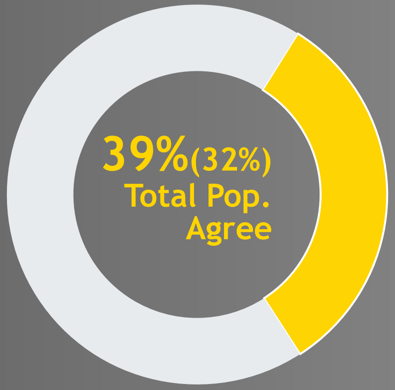
Base: all Adults 16+ - 1,003

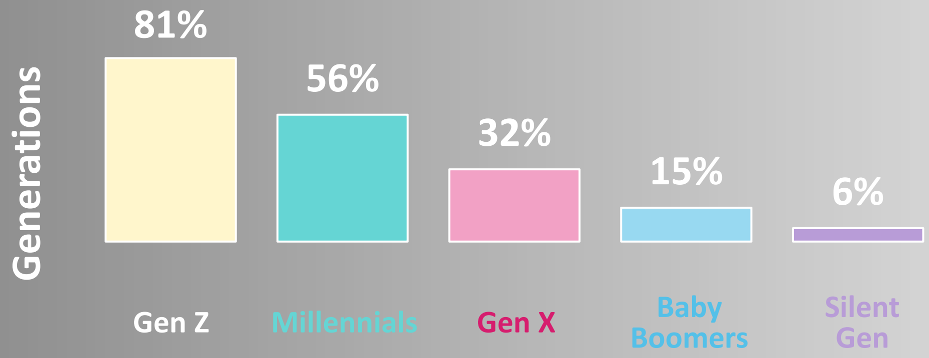
Broadband is more important to me than TV





I am watching more content on YouTube than on live TV





()=2020 data

Q.13b To what extent do you agree or disagree ...

36%

of the population

no longer see the value in paying for live TV plans (e.g. Virgin, Sky) as they can access all content through streaming services

Rising to 57% amongst GenZ and 50% amongst Millennials

B&A

Generations

Gen Z 57%

Millennials 50%

Gen X 35%

Baby Boomers 20%

Silent Gen 5%

Digital financial products are growing

23%

(18%)

of Pop.

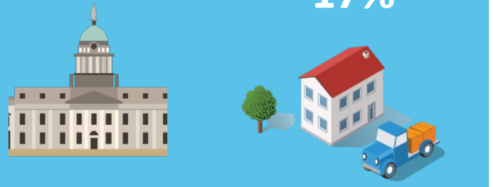
Almost 900,000 consumers now use digital financial products in Ireland

(e.g. Revolut, N26, Monzo).

Dirven by middle class and Dubliners

Region

Dublin	Outside Dublin
36%	17%



Social class

ABC1	C2DE
37%	12%

Generations

Gen Z	33%
Millennials	33%
Gen X	27%
Baby Boomers	8%
Silent Gen	1%

()=2020 data

Growth in paid and other streaming and digital banking…

Base: All adults 16+ - 1,001

Entertainment

(69%) 70%
Watch or listen to content on YouTube

Either = 71% (67%) (so Netflix people have Amazon Prime)

(66%) 69%
Watch Netflix

(21%) 33%
Watch Amazon Prime

(19%) 24%

(47%) 47%
Use catch-up TV services like RTE Player, TV3 Player, All4, Virgin and Sky On Demand etc on mobile/laptop/TV or other devices

(48%) 48%
Stream music, via Spotify, YouTube, etc

(31%) 34%
Watch or stream live sports or other events online

(35%) 37%
Listen to Podcasts

(18%) 17%
Watch/stream movies/shows etc. via sites such as Showbox, Putlocker , etc.

(15%) 18%
Play Games online with others

Communications

75% (79%)
Use personal email

68% (72%)
use instant messaging - WhatsApp, Facebook Messenger, Snapchat, Viber, Discord, Skype etc.)

69% (66%)
Online banking (e.g. your banking website app or login to their website)

68% (65%)
Call someone using WhatsApp, Viber, etc.

44% (46%)
Skype/Facetime or other video calling

31% (28%)
Use cloud applications (e.g. WeTransfer, One Drive, Dropbox, iCloud, Google Drive, Evernote etc.)

23% (18%)
Digital financial products/banks such as Revolut, N26, Monzo

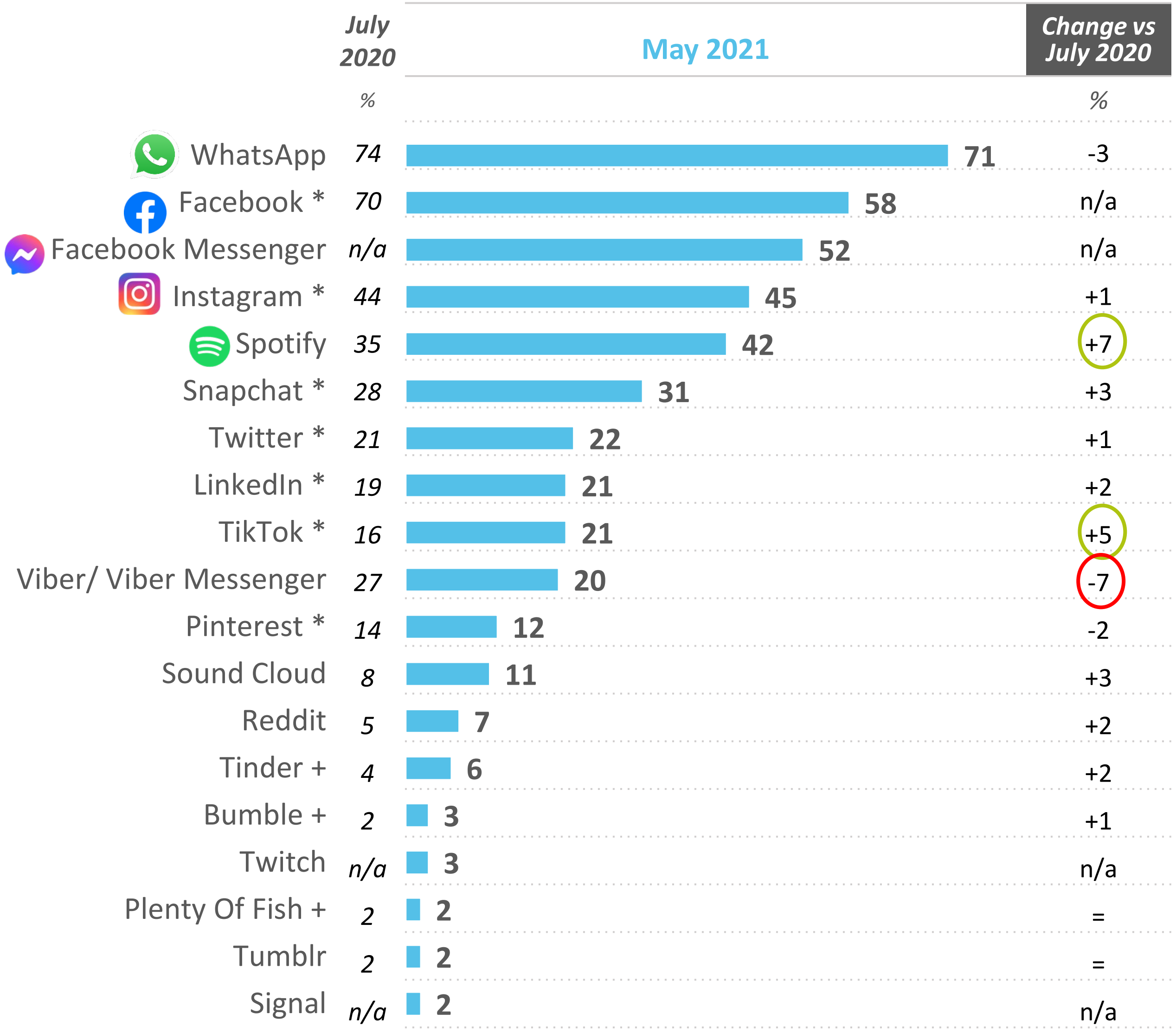
Which of these do you do nowadays anywhere?

( ) = Brackets relate to July 2020

Social animals

Facebook and WhatsApp remain the most popular social media and OTT services used in 2021

Base: All Adults 16+ - 1,003



	July 2020	May 2021	*Change vs July 2020*
	%		*%*
WhatsApp	*74*	**71**	-3
Facebook *	*70*	**58**	n/a
Facebook Messenger	*n/a*	**52**	n/a
Instagram *	*44*	**45**	+1
Spotify	*35*	**42**	+7
Snapchat *	*28*	**31**	+3
Twitter *	*21*	**22**	+1
LinkedIn *	*19*	**21**	+2
TikTok *	*16*	**21**	+5
Viber/ Viber Messenger	*27*	**20**	-7
Pinterest *	*14*	**12**	-2
Sound Cloud	*8*	**11**	+3
Reddit	*5*	**7**	+2
Tinder +	*4*	**6**	+2
Bumble +	*2*	**3**	+1
Twitch	*n/a*	**3**	n/a
Plenty Of Fish +	*2*	**2**	=
Tumblr	*2*	**2**	=
Signal	*n/a*	**2**	n/a

Facebook messenger added May 2021 – impacting Facebook comparison results
Signal & Twitch also added May 2021
** = Social media*

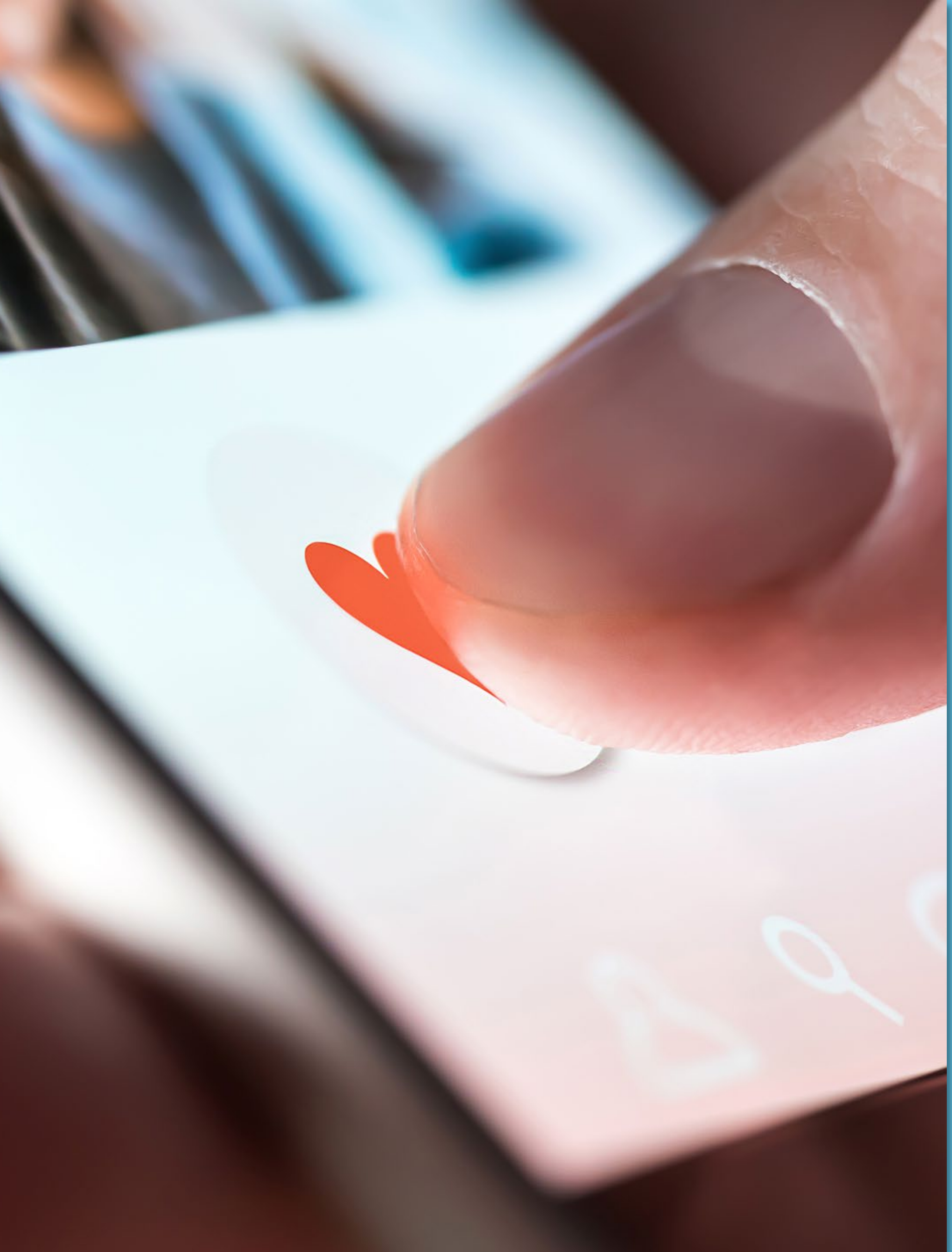
Q.5 Which of the following, if any, do you ever use nowadays?

Spotify and TikTok usage has increased most significantly over the past year (+7%/+5%)

***Any Social Media usage nowadays =**

82%

(78% in July 2020)



TikTok

66%

GenZ are on TikTok

Total population 21%

Generations

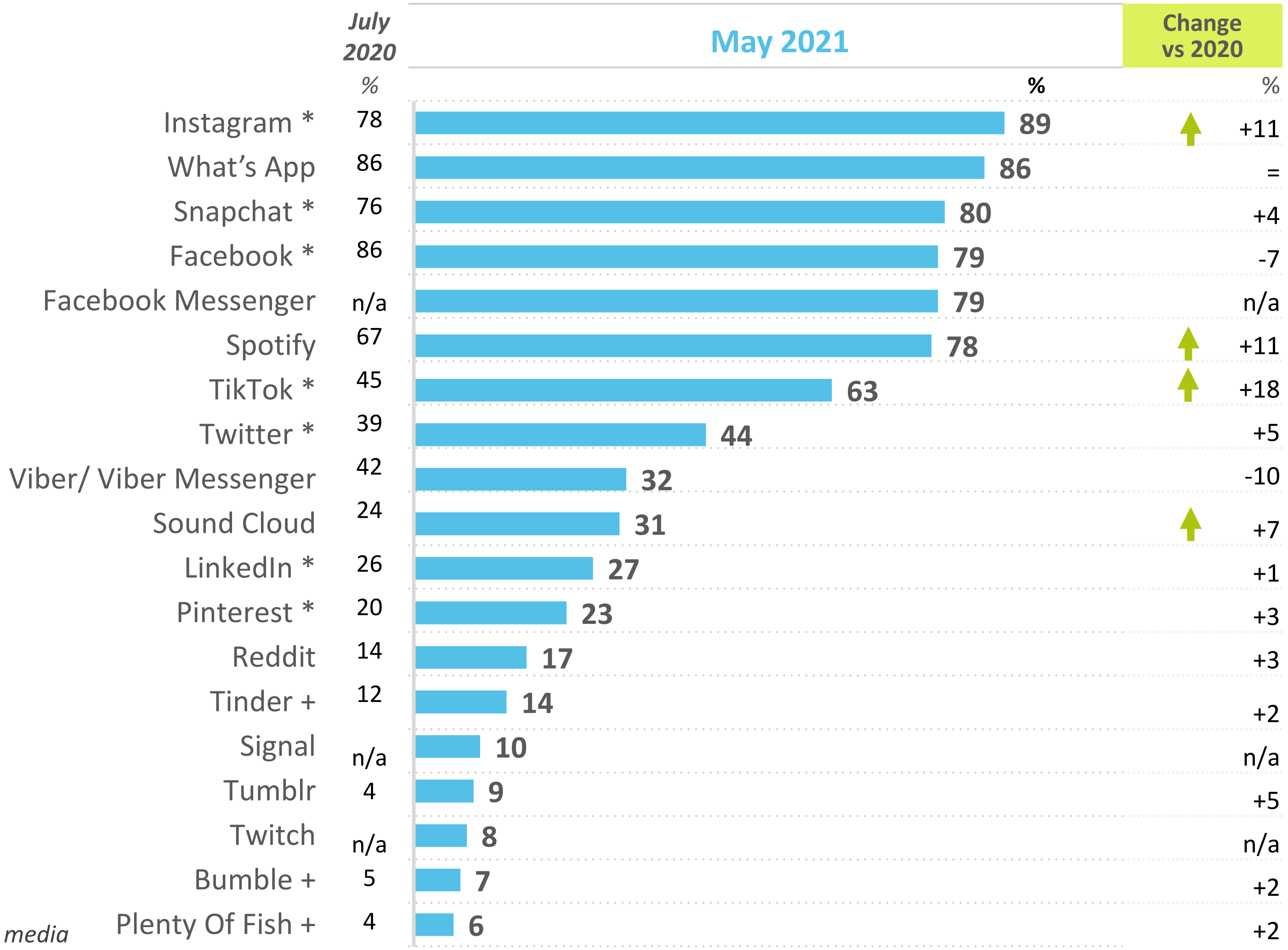




Gen Z	66%
Millennials	30%
Gen X	14%
Baby Boomers	2%
Silent Gen	2%

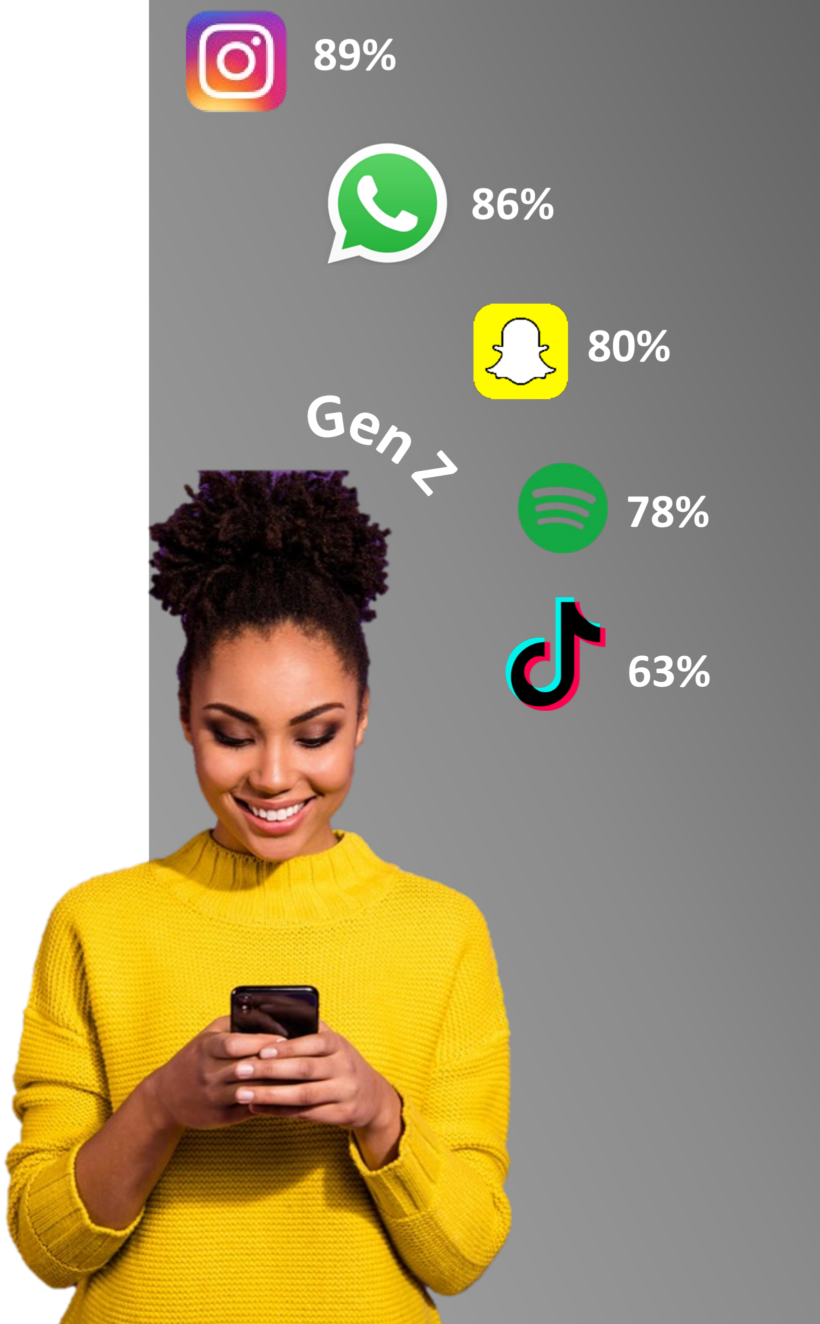
Instagram & WhatsApp are the main platforms used by 16-24 year olds, with Instagram, Spotify, TikTok & Sound Cloud having experienced the most significant increase in usage amongst this age group over the past year

Base: All 16-24s - 114



** = Social media*
+ = Dating Sites

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

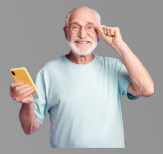


45%

claim their use of social media sites has increased during the Covid-19 crisis

Generations



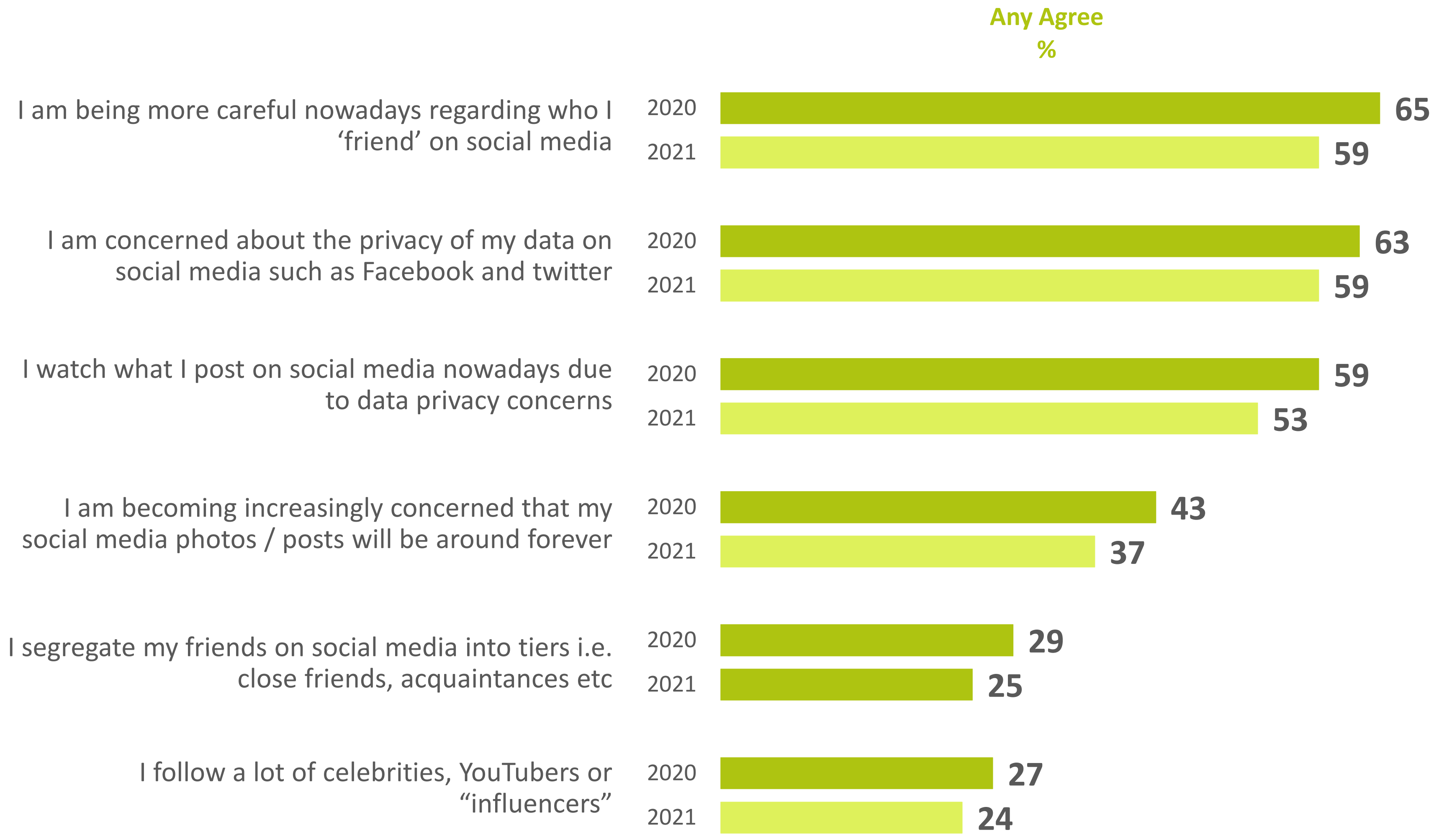




Gen Z	77%
Millennials	55%
Gen X	44%
Baby Boomers	31%
Silent Gen	14%

Social impact of tech

Decline in levels of social media concern 2021 vs. 2020

Base: All adults 16+ - 1,003



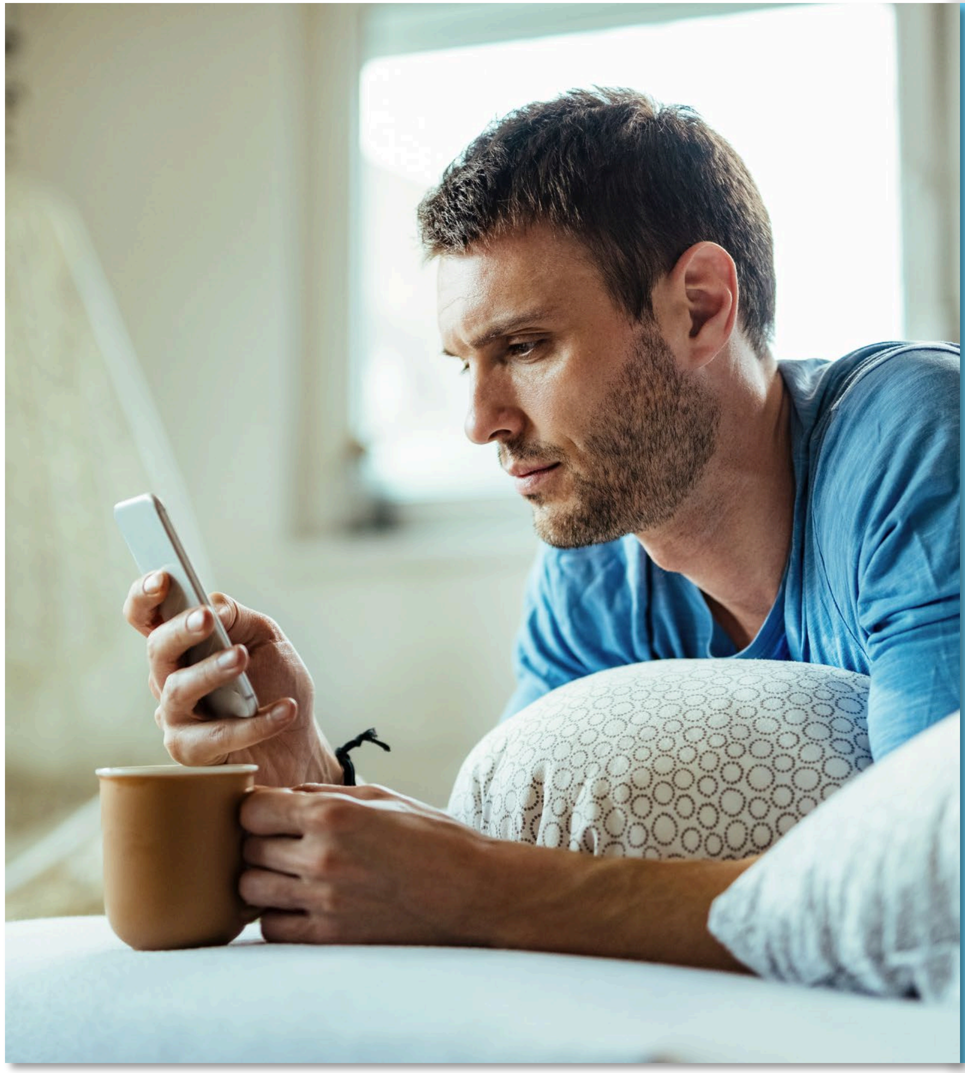
59%

Total Pop.
(-6%pts vs 2020)

I am being more careful nowadays regarding who I 'friend' with on social media

Q.13 To what extent do you agree or disagree ...

No change in the incidence of people who feel they are always on since the pandemic!



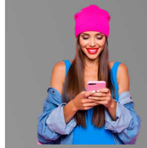
58%

check emails, text messages, or social media last thing at night or first thing in the morning

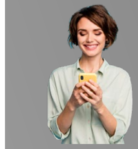
(57% in 2020 / 53% in 2017)

Base: All Adults 16+ who use SM (705)

Generations



Gen Z 75%



Millennials 64%

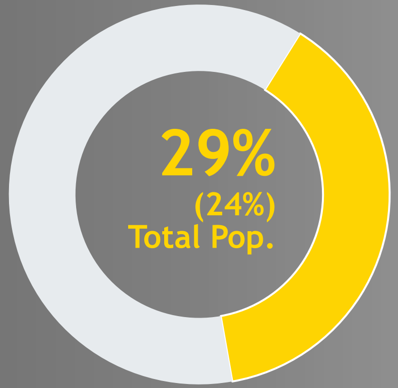
Gen X 52%

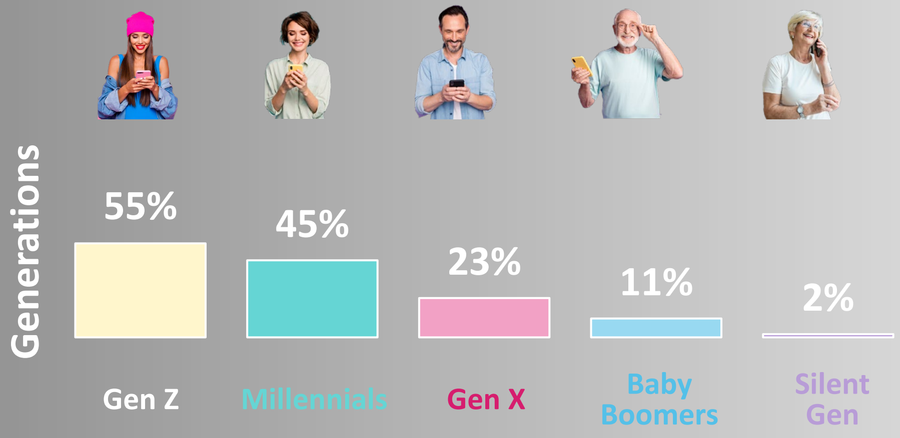
Baby Boomers 38%

Silent Gen 31%

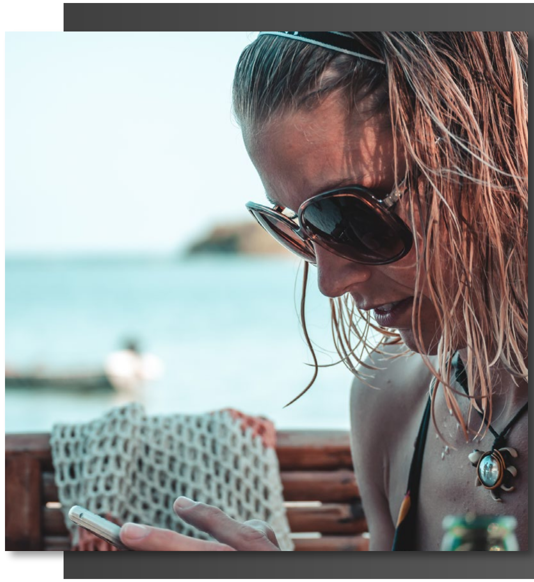
More of us are checking social media when having difficulty sleeping but those who check work email when on holiday remains the same….

Check social media or emails when having difficulty sleeping



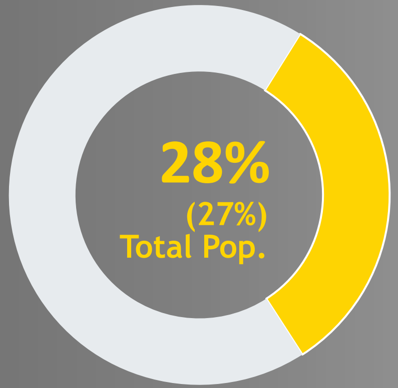


Base: All Adults 16+ who use SM (705)

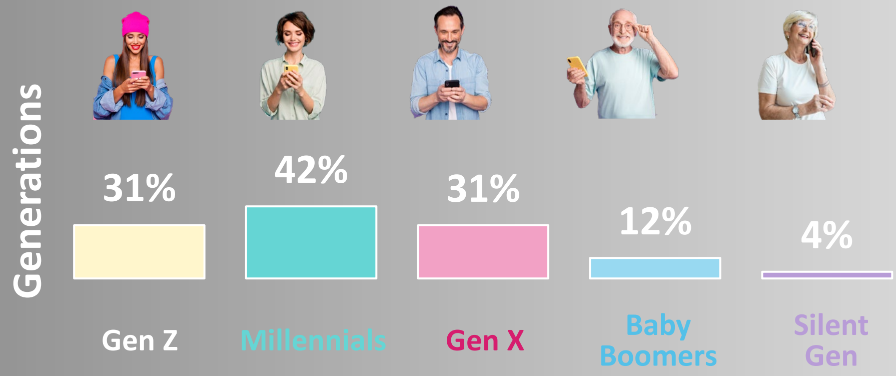


Check work emails when on holidays

More likely to be ABC1 (due to having more tech and their type of work)

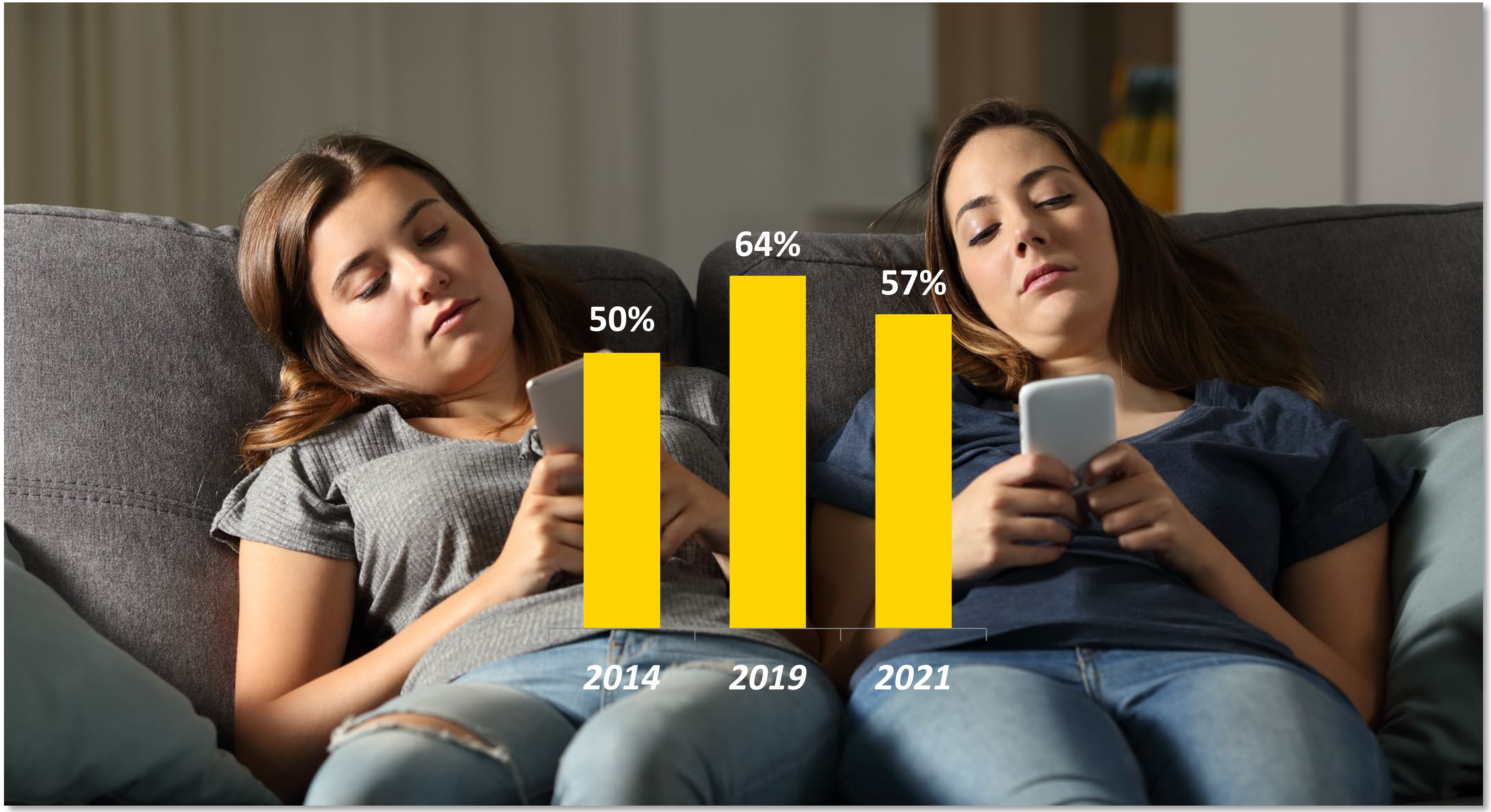


(41% amongst all working)



()=2020 data

2021 sees a decline in the incidence of those who feel that the art of conversation is increasingly being lost - impact of Covid lockdowns perhaps?



Age

	2014	2020	2021
	%	%	%
16-24	37	47	52
25-34	50	61	64
35-49	51	68	60
50-64	57	67	60
65+	55	69	49

The decline is being driven by the 35+ age group – those under 35 are increasingly agreeing with this!

42%

cannot imagine their life without social media

↑ **+7%pts vs 2019**

49%

are getting tired of Facebook and other social media

↓ **-3%pts vs 2020**

Online activities

Online purchasing continues to grow, but what are we buying online?

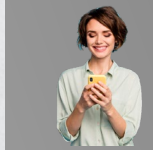
B&A

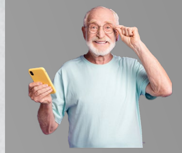
63%
(61%)
purchase Online

Flights 80% (86%)	Hotel bookings 75% (82%)	Clothes/ shoes 83% (80%) *(89% Female)*	Electric goods 54% (40%)
Car hire 39% (33%)	Music/film downloads /CD/DVDs/ TV shows 42% (40%)	Magazine/ Book 40% (31%)	Computer games 29% (23%)
Groceries 25% (16%) *(24% Dublin)*	Pharm drugs/ medicines 15% (9%)	BUY	

Base: All adults that purchase online – 2020 599/2021 627

Online purchases Generations





Gen Z	84% (76%)
Millennials	82% (79%)
Gen X	71% (60%)
Baby Boomers	39% (38%)
Silent Gen	15% (19%)

Declines in the core categories of flights and hotels but growth across the majority of other categories – most likely impacted by the pandemic.

? *Which, if any of the following do you do nowadays?*

( ) = 2020

15%

of all adults have purchased groceries online (10% in 2020)

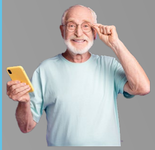
(Rising to 25% amongst all who purchase online)

22%

use apps to help them meditate/ relax/ disconnect from the world

(Peaks amongst GenZ and Millennials)

Generations



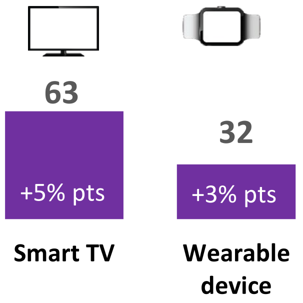
Gen Z	32%
Millennials	32%
Gen X	22%
Baby Boomers	11%
Silent Gen	4%

Top tech summary 2021

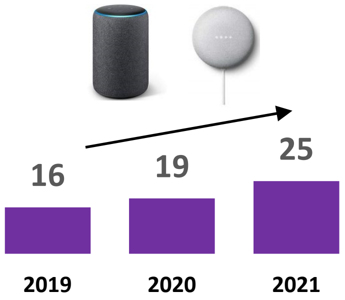
Top tech summary

B&A

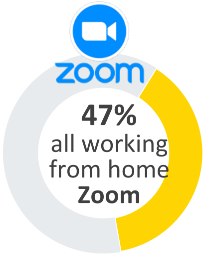
Ownership of smart TVs and wearables devices continues to grow



Ownership of smart hubs also on the increase



Zoom is the main video communications platforms used; particularly amongst those working from home



Families with pre-teenagers have an average of 10 SMART* (the average home has 7)

– note a tech divide still exits; Middle class (ABC1) Vs Blue Collar (C2DE) and Dublin Vs Outside.

No change in YOY **daily internet usage** as **80%** of all adults access the internet once a day or more often – but **43% of the over 65s are never online** (internet usage is growing amongst this cohort however)

23% of Irish consumers now use digital financial products eg Revolut, N26, Monzo (+5%pts vs 2020) – driven by the middle class & Dubliners

The importance of **broadband** is continuing to grow and it's now more important than TV for Gen Z, Millennials and Gen X

2021 sees continued growth in the use of TV streaming platforms

NETFLIX	prime	Disney+	RTÉ PLAYER
69%	33%	24%	34%
(+3% pts)	(+12% pts)	(+5% pts)	(+3% pts)

45% claim their use of social media has increased during the Covid 19 pandemic.

42% can't imagine their life without social media (+7%pts vs 2019).

36% no longer see the value in the paying for live TV plans as they can access all content through streaming devices (over 50% amongst Millennials & Gen Z)

Gen Z 57% **Millennials 50%**

No change in the incidence of people who felt they are always on since the pandemic **(58%)**

but more are checking social media last thing at night or first thing in the morning **(57%)** (+5pts since 2019)

Facebook and WhatsApp

remain the most popular social media and OTT services used in 2021

(Amongst the **16-24** age group **Instagram, Spotify, TikTok, and Soundcloud** experienced the most significant increase YOY).

Online purchasing

continues to grow (63%) but there has been declines in the core categories of

Flights (-6% pts)

Hotels (-7 pts)

Thank you.

RESEARCH
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Delve Deeper