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eir Connected Living Survey

.....
2015



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Introduction

The eir Connected Living Survey is a nationwide survey undertaken by eir to understand the usage and impact of technology in Irish homes. As Ireland's largest telecommunications provider, the eir Connected Living Survey aims to record the social changes experienced in Ireland as a result of technology and innovation. The survey, taken across 1,013 Irish households nationwide is an in-depth piece of research conducted by Behaviours & Attitudes. Participants were asked about how they interacted with technology, what role connectivity played in their personal, home and family lives and the role of the Internet from an educational, health, entertainment and functional perspective. Information was shared in relation to the rise of digital devices and predicted growth; the need to power down but increased demand for better and faster broadband speeds; the changing face of social media; how the Internet has impacted on where and what people eat; online shopping trends and patterns and diagnostic 'value' of Dr Google.

The sample was quota controlled in terms of gender, age, socio-economic status – all within region. Fieldwork for Phase VI was conducted between 14th August to 30th August 2015.



Key theme 1

..... Digital devices in the home

A 3-Speed Ireland exists regarding device access. The most significant growth was in; Smartphones, Tablets, Smart TVs and eReaders – especially in Dublin.

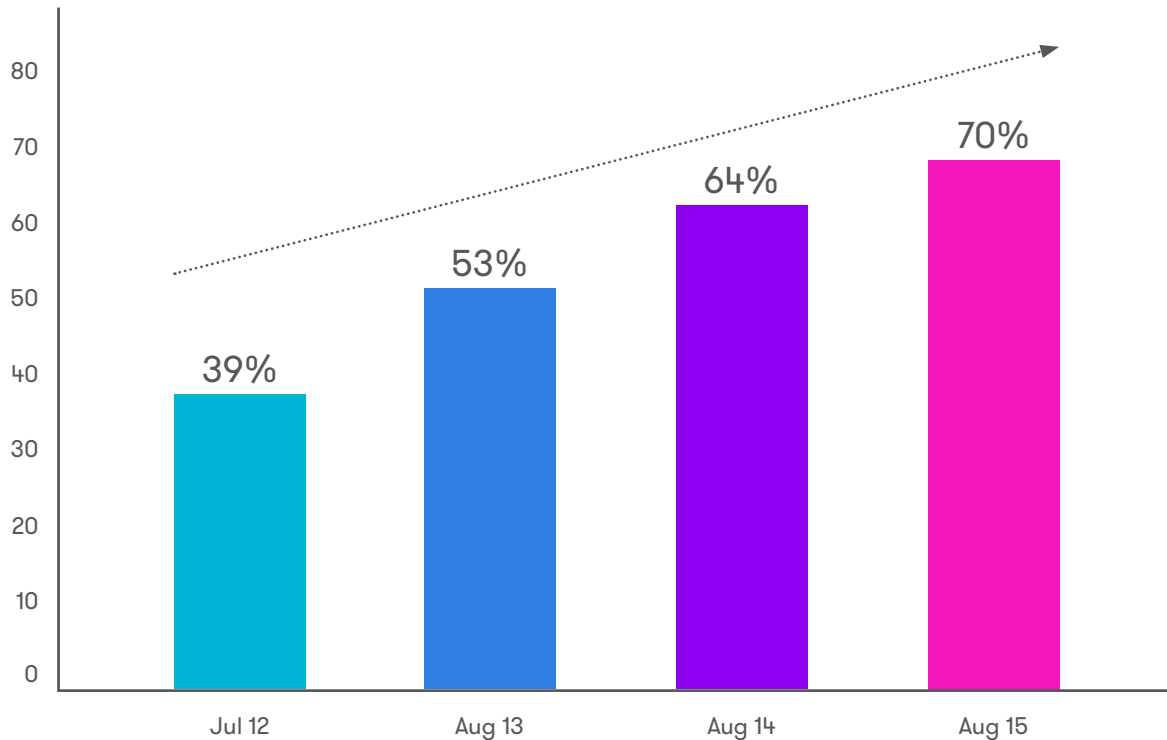


Claimed smartphone ownership continues to grow



Base: All with mobile

Smartphone Ownership



Equates to
2,377,000
users



Question: 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.

The tablet situation



Aug 2015

49% now have access to a tablet
in August 2015 (1,733,000 adults 16+)



15% of those without a tablet
are likely to get one this year
(272,000 adults 16+)



Potential for tablets access
to top 2 million adults
by the end of the year



Growth in tablet
access since
Aug '14
(41% penetration
August '14)

Desire for new devices also strong



Base: 1.649 million households

21% now have access to a smart TV



12% without one are likely to get one this year (154,000 households)



Thus potential for almost half a million households to have access by the year end



11% of adults now have access to a media streaming device (e.g. Apple TV, Chromecast, etc.) – 176,000 households

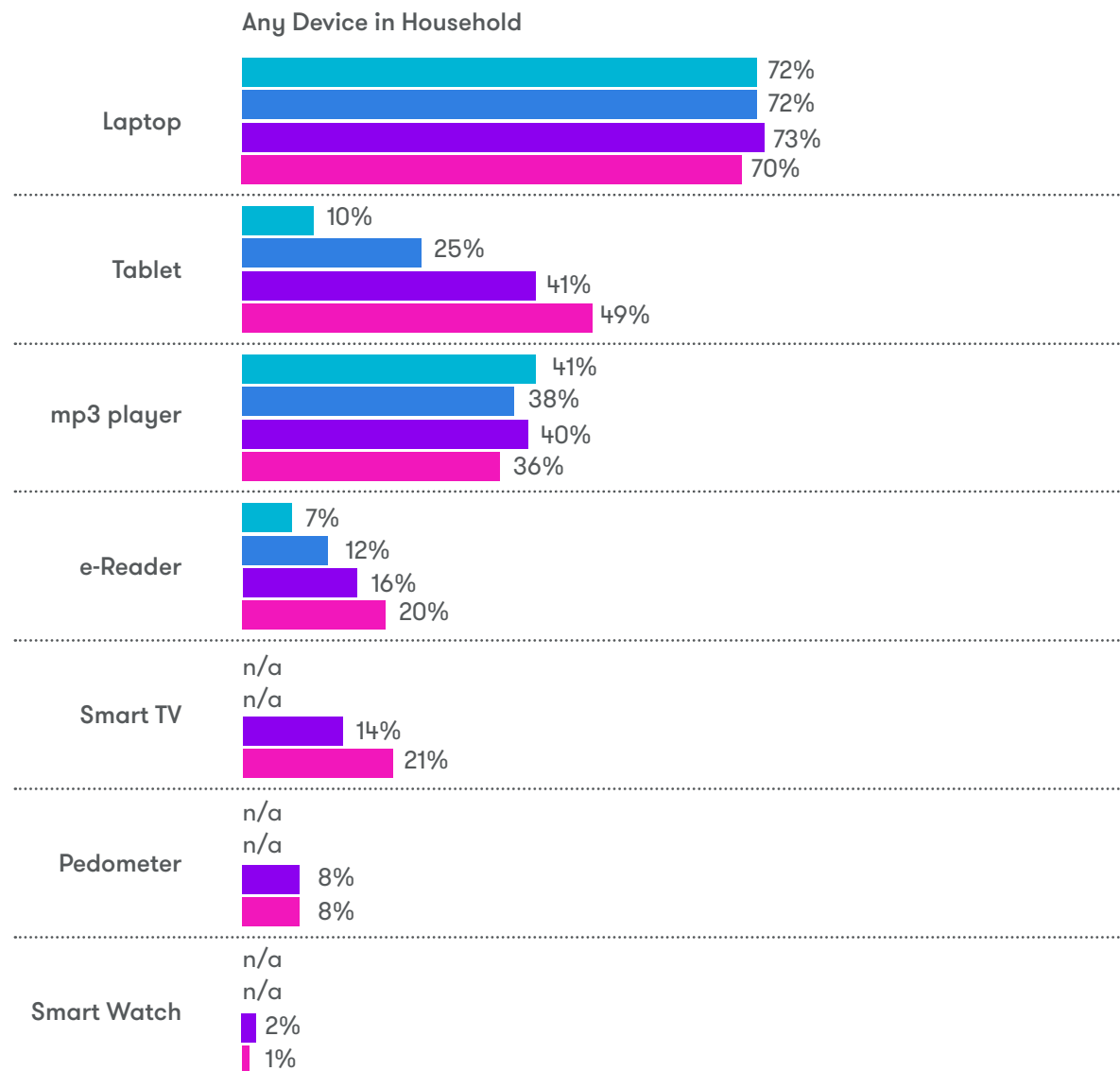


7% of those without one are likely to get one this year (103,000 households)



Thus potential for over a quarter of a million households to have one by year end

Devices growth continues to increase, with Smart TVs now matching e-Readers



Tablets, Smart TVs and e-Readers demonstrating steady growth

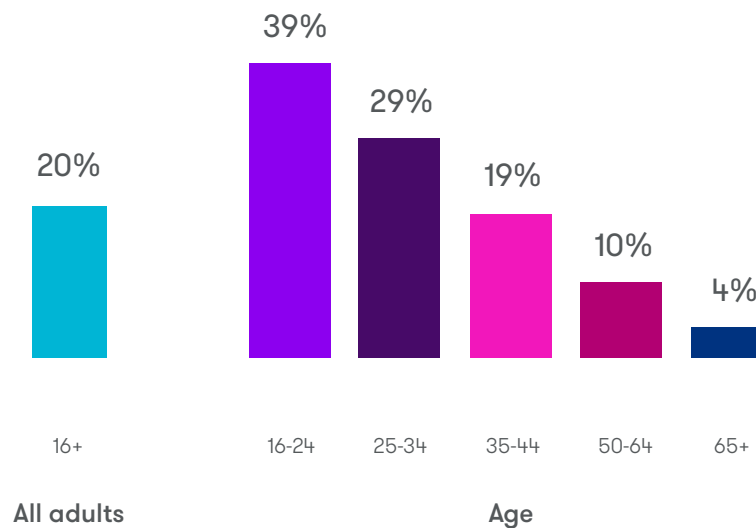
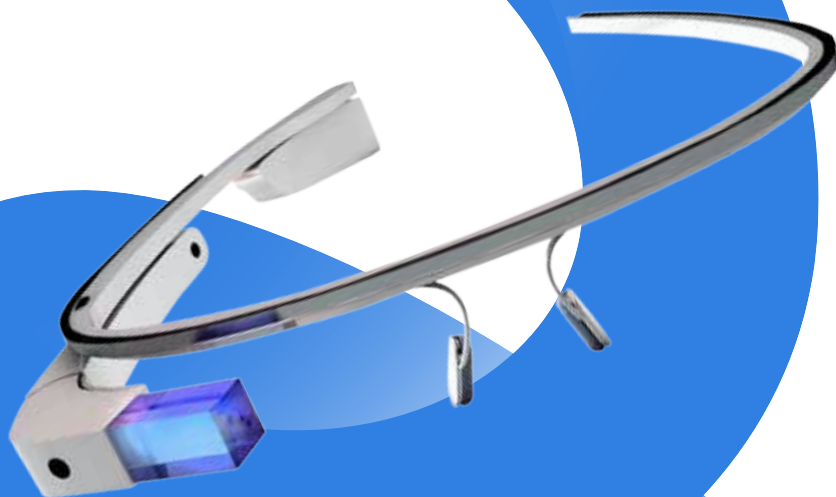


Question: Which of the following devices are in your household? It does not matter who owns them in the household

The jury is still out on wearable devices – smart glasses, fitness-tracking bands



20%
of adults 16+
interested in
buying



Question: And how interested would you be in buying 'Other wearable gadgets' such as fitness-tracking bands, smart glasses etc.?

.....
75% of the population
now access the internet
once a day or more often
(up from 69% in Aug 14)



Older generations are
increasingly active online
(45% of those 50+ are
online at least daily in
2015 vs 36% in 2014)

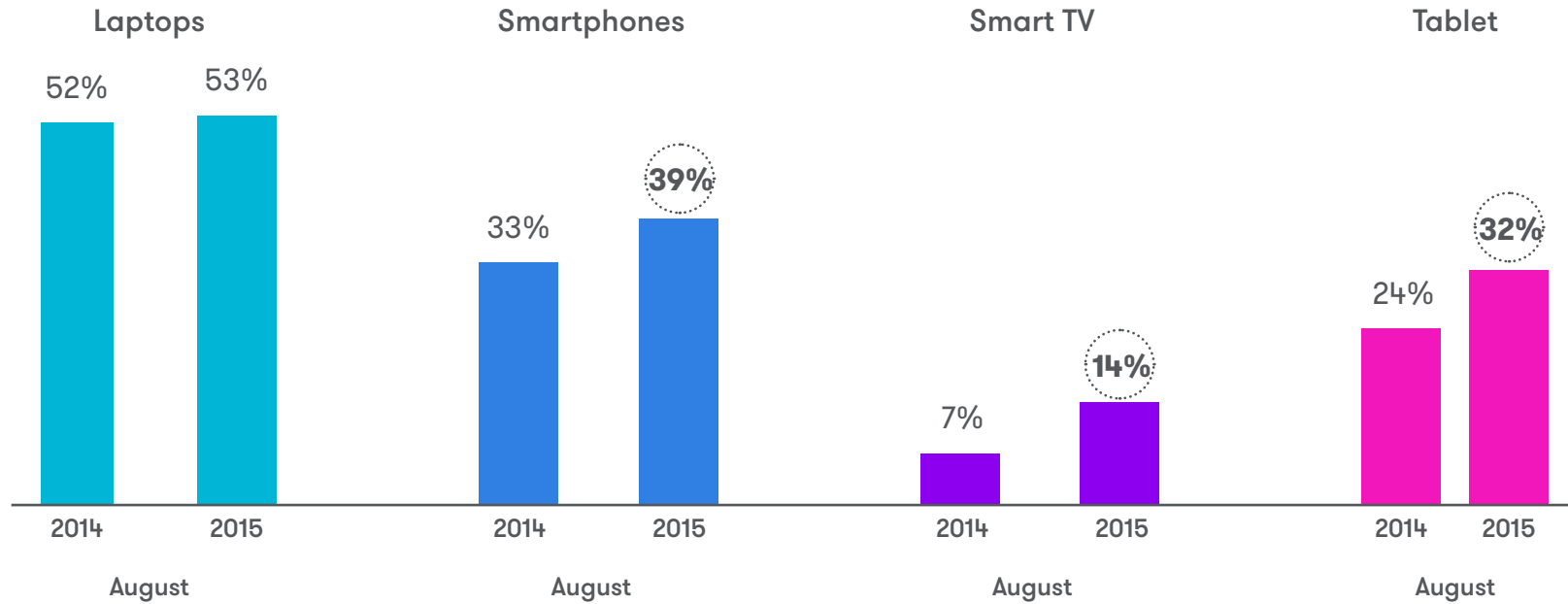
.....



Desire for Internet has increased particularly in 50+ age group



Base: All aged 50+ years - 363













Question: Which of the following do you have in your household?

Dynamic Online Behaviour At Home 2015



Did you know that...

	66% Use personal email (61%)		35% Skype nowadays (31%)
	59% Watch YouTube (52%)		35% Download/stream or watch movies online (26%)
	50% Online Bank (45%)		30% Watch On-Demand services like Netflix (20%)
	48% of workers check work email at home (42%)		22% Watch or stream live sports or other events online (17%)
	37% use catch-up TV services like RTE Player, TV3 Player, 4oD etc.		23% 23% stream music (15%)

() Bracketed figures relate to Aug '14



Question: Which of these do you do nowadays at home?

Key theme 2

.....
 We have become more positive towards technology (BB, smartphones etc.), but work is intruding on home life (need to 'Power Down' evident)



.....

Home: Work delineation is blurring. The need to 'Power Down' evident

9% of all adults now run a business from home

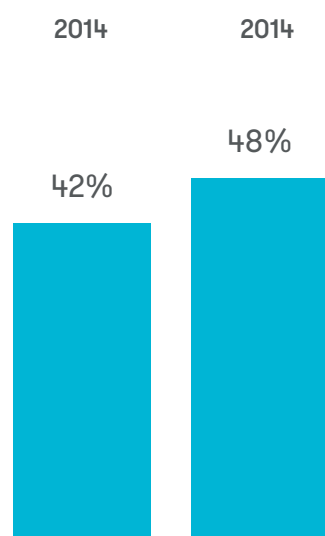
And 39% of the total population (or 59% of working population) now do some form of their work at home (e.g. check emails, bring work home, etc.)

.....

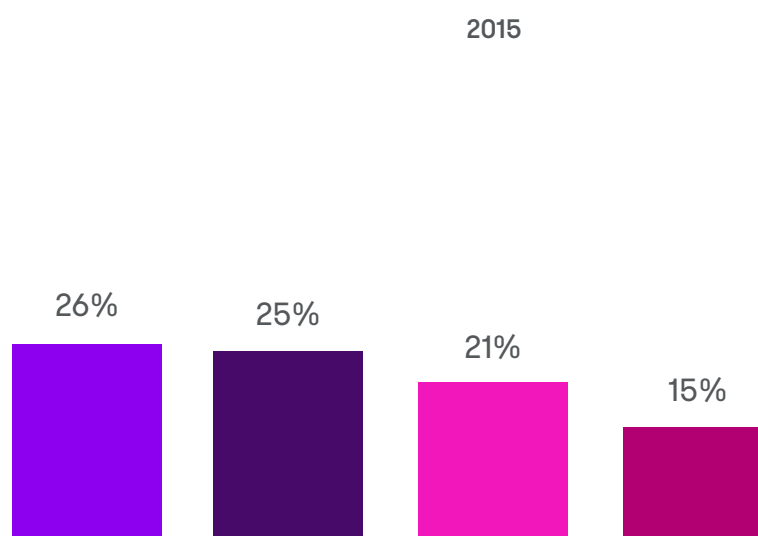


Work is intruding on home life; 48% of working people now check work email at home (up from 42% in August 2014)

Base: All working 527



Check work emails at home



I often catch up on work in the evenings at home

I often catch up with work at home over the weekends

I work occasionally from home, but I am not based at home

I run a business from home

Key theme 3

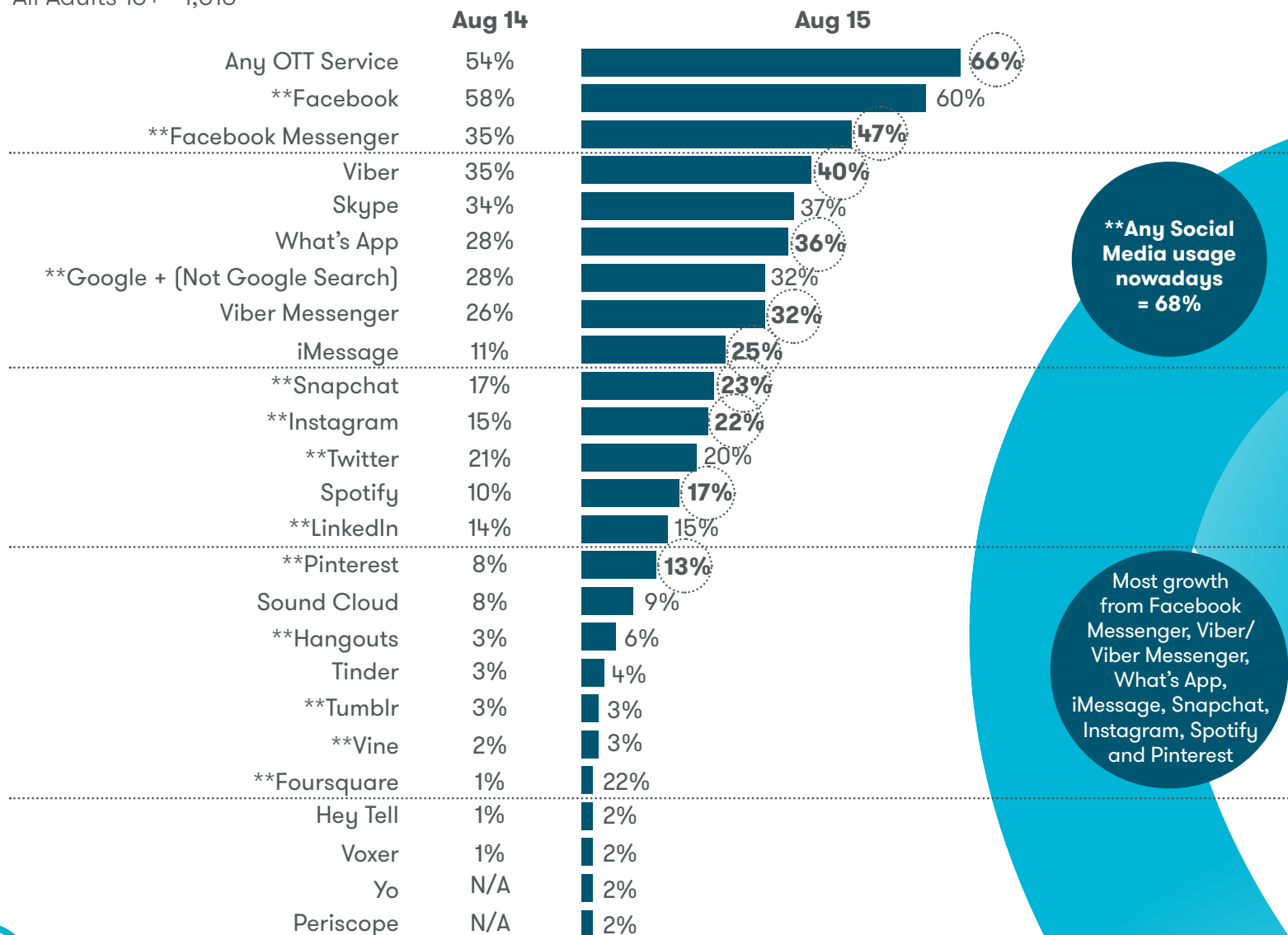
.....
The ever changing face of
social media & OTT services

No Twitter growth, but usage
of OTT services, Snapchat,
Instagram, Spotify and
Pinterest increases



No growth in Twitter, but OTT services, Snapchat, Instagram, Spotify and Pinterest grow

Base: All Adults 16+ - 1,013



****Any Social Media usage nowadays = 68%**

Most growth from Facebook Messenger, Viber/Viber Messenger, What's App, iMessage, Snapchat, Instagram, Spotify and Pinterest

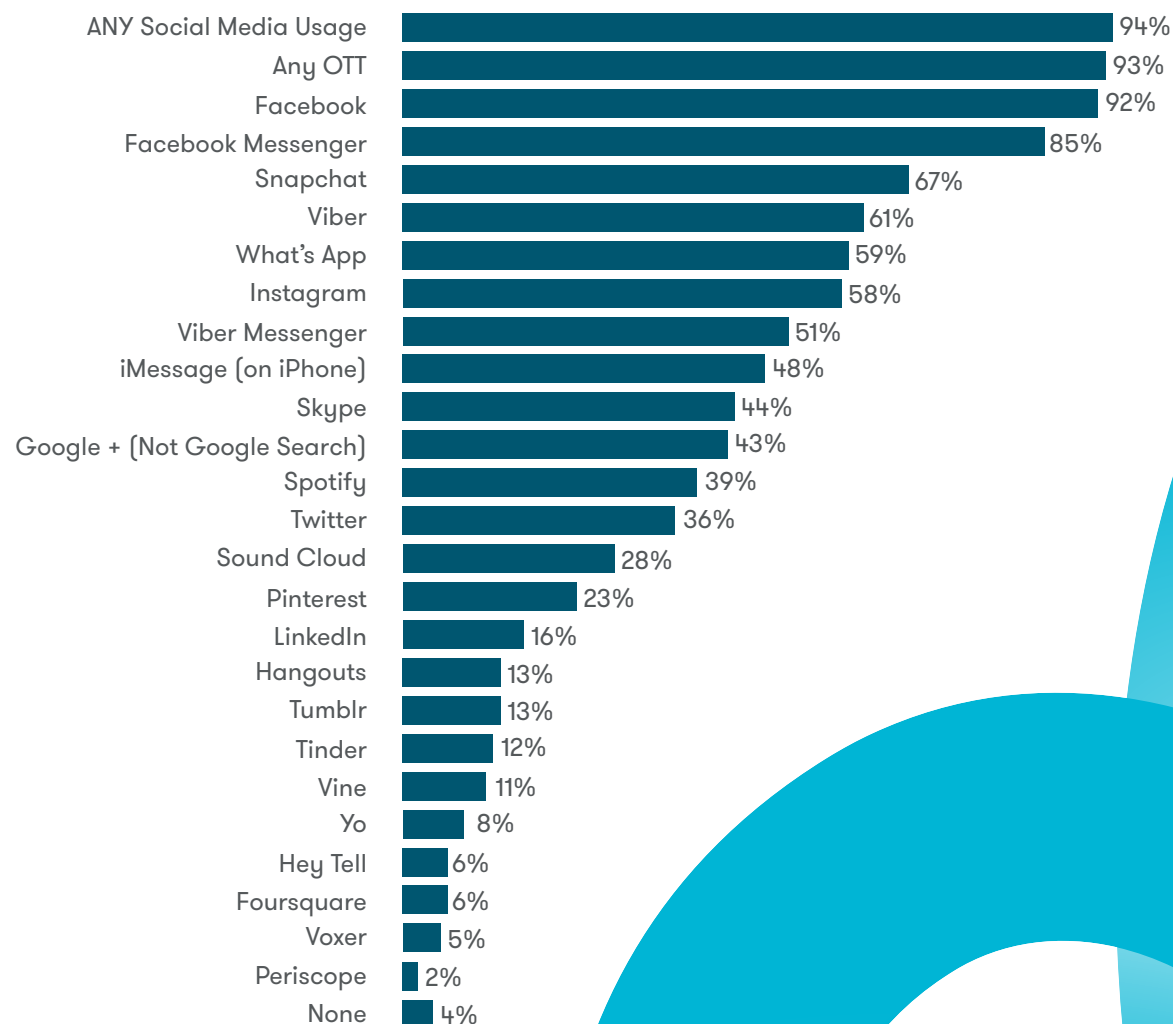


Which of the following, if any, of these do you ever use nowadays?

** = Social media sites

Top social media/OTT services for 16-24s: OTT services as popular as Social Media amongst the youth, with Snapchat closing in on Facebook. Instagram is also hugely popular

Base: All 16-24s -139



**Now No.2
after
Facebook**



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

Key theme 4

Fibre (Better Broadband) creates an appetite to do more , especially in rural areas

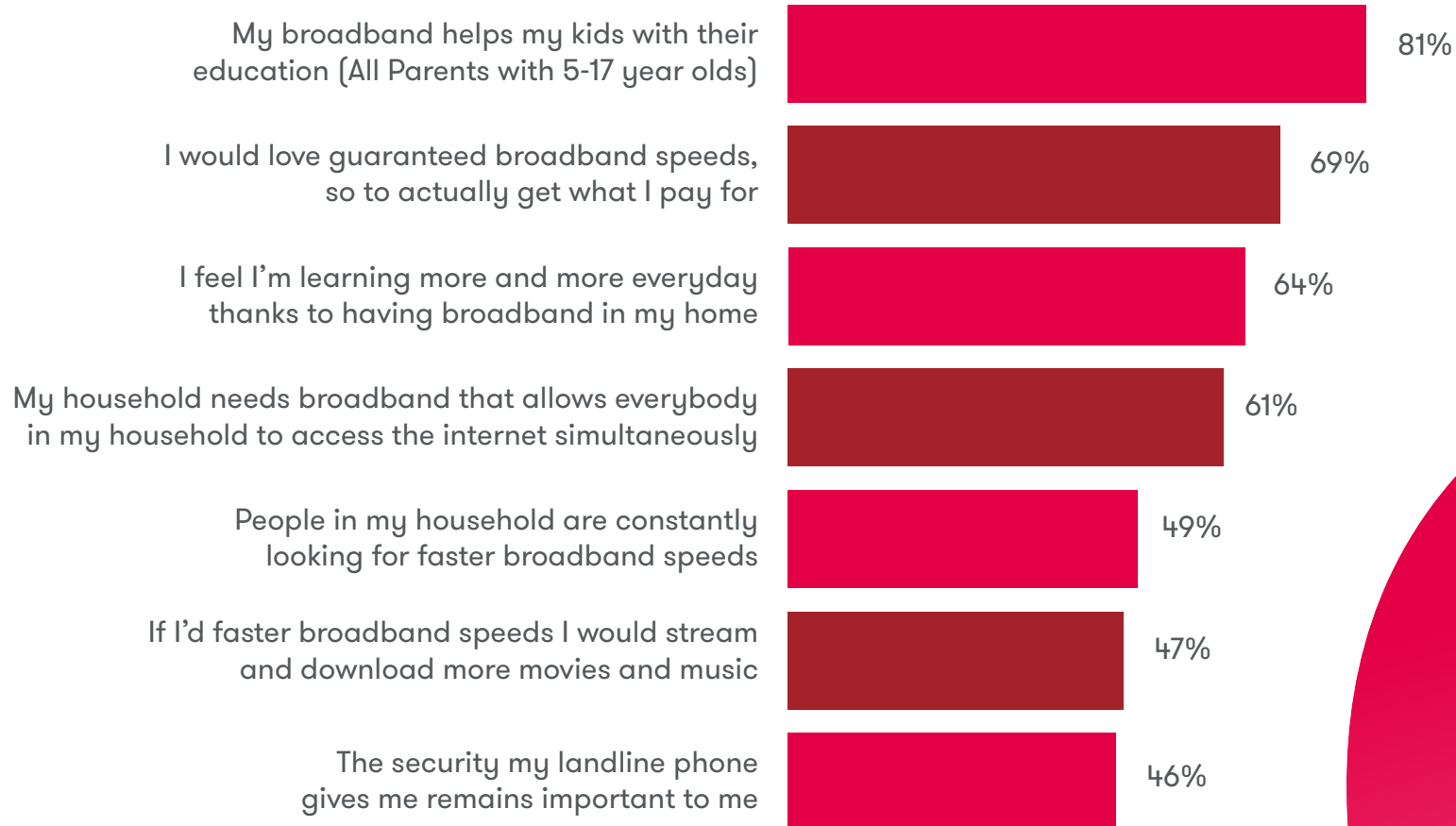


Attitudes to Fibre (Better Broadband) are strong



Base: All main decision makers with Broadband in household - 262

% Agree



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



Those under 35, parents and those living in rural areas feel the need for speed and better Broadband in general

Base: All main decision makers with Broadband in household - 262

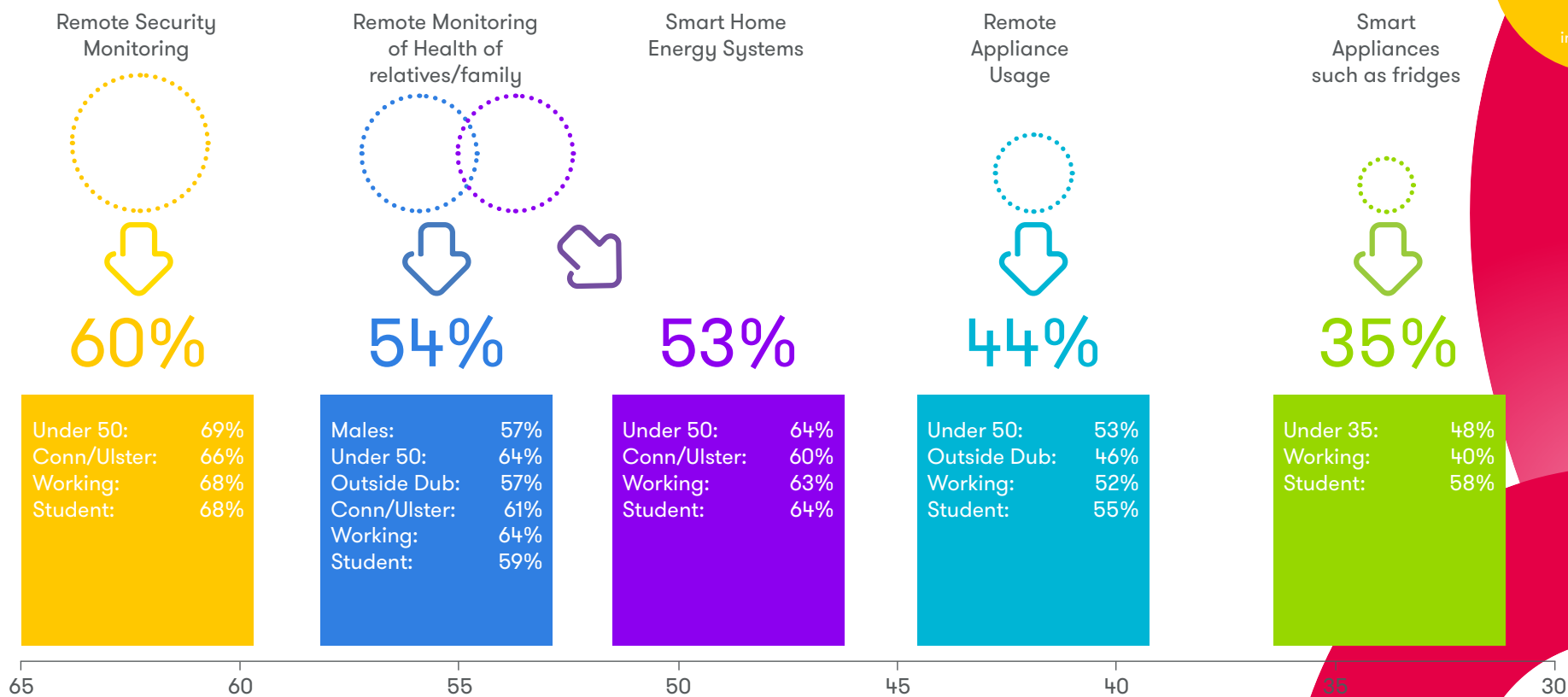
% Agree	Total	Age				Age 2		Region						Area		Parents of Children (5-17 yrs)	
		25-34	35-49	50-64	65+	16-34	35+	Dublin	Outside Dublin	All Leinster	Leinster Ex Dublin	Munster	Conn/Ulster	Urban	Rural	Yes	No
Base:	262	56	98	60	40	64	198	89	173	138	49	90	34	180	82	95	167
I would love guaranteed broadband speeds, so to actually get what I pay for	69	79	78	66	32	78	65	61	72	63	67	69	89	63	80	80	62
I feel I'm learning more and more everyday thanks to having broadband in my home	64	67	67	64	53	65	63	56	68	57	60	68	81	61	69	68	62
My household needs broadband that allows everybody in my household to access the internet simultaneously	61	69	74	58	30	63	61	55	65	54	53	68	74	55	75	80	50
People in my household are constantly looking for faster broadband speeds	49	61	54	43	25	60	45	37	56	45	59	50	66	44	59	60	43
If I'd faster broadband speeds I would stream and download more movies and music	47	62	52	34	17	66	40	34	54	37	41	57	66	43	55	55	42
The security my landline phone gives me remains important to me	46	35	45	57	60	31	52	42	48	43	45	52	45	43	52	39	50
My broadband helps my kids with their education	45	49	52	43	22	49	44	39	48	41	44	55	37	42	52	81	24



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

Remote monitoring products currently hold the most interest – interest extends up to 50 year olds

Base: All Adults 16+ - 1,013



70% of the population are interested in at least one of these (under 50s in particular)



Question: How interested would you be in using the following technological based products in the future?

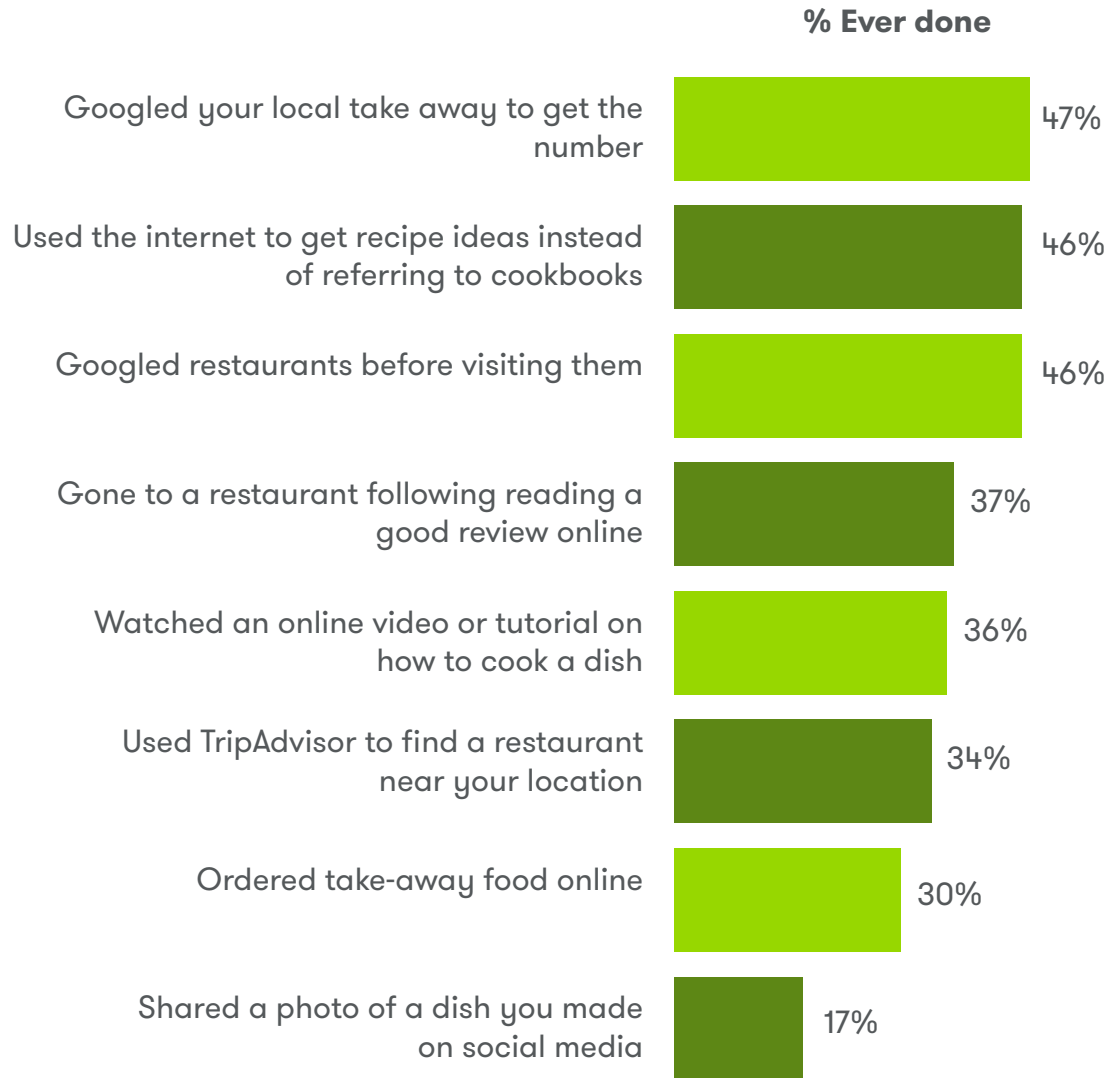
Key theme 5

.....
Let's Eat Online! The way
to a healthier diet



Let Eat Online!

Base: All Adults 16+

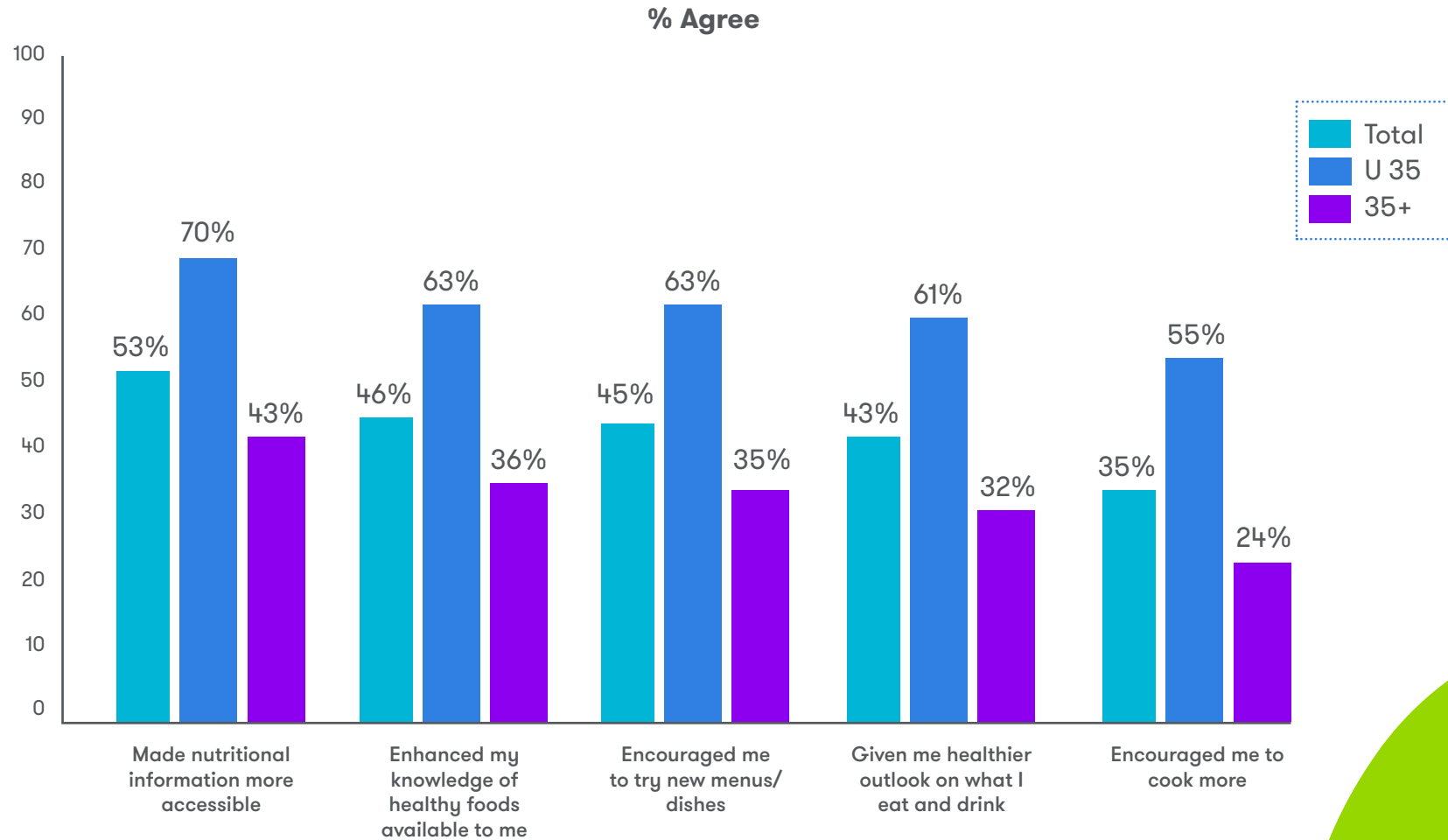


Question: Have you ever done any of the following?

Access to food ideas and info online is contributing to a healthier youth



Base: All Adults 16+



Question: To what extent do you agree or disagree with the following – The access to food ideas and information online has ...

Those with children, urbanites and smartphone users focusing on healthy eating due to online ideas and info



Base: All Adults 16+

	Total	Area		Parents of Children		Smartphone Ownership	
		Urban	Rural	Any 5-17yrs	None 5-17yrs	Yes	No
	%	%	%	%	%	%	%
Made nutritional information more accessible	53	55	50	59	51	66	29
Enhanced my knowledge of healthy foods available to me	46	48	42	50	44	58	24
Encouraged me to try new menus/dishes	45	46	43	49	43	57	23
Given me a healthier outlook on what I eat and drink	43	43	41	47	41	54	21
Encouraged me to cook more	35	36	34	34	35	44	18



Question: To what extent do you agree or disagree with the following – The access to food ideas and information online has ...

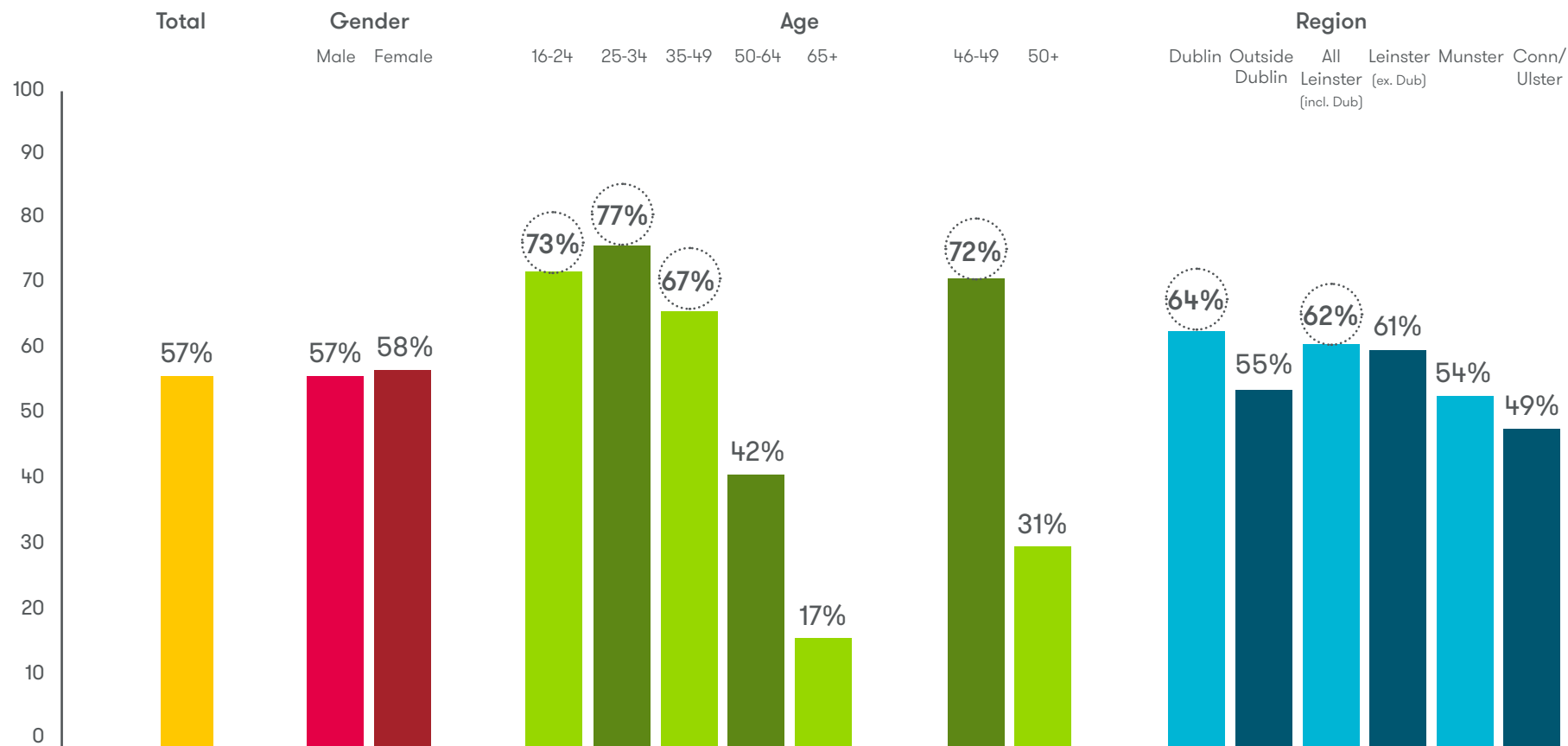
Key theme 6

Online shopping just a part of life in 2015, but a 3 speed online economy exists with Dublin more active vs other urban areas and rural Ireland



Almost 3 in 5 of the population now buy items online, especially under 50 and Dubliners

Base: All Adults 16+ - 1,013

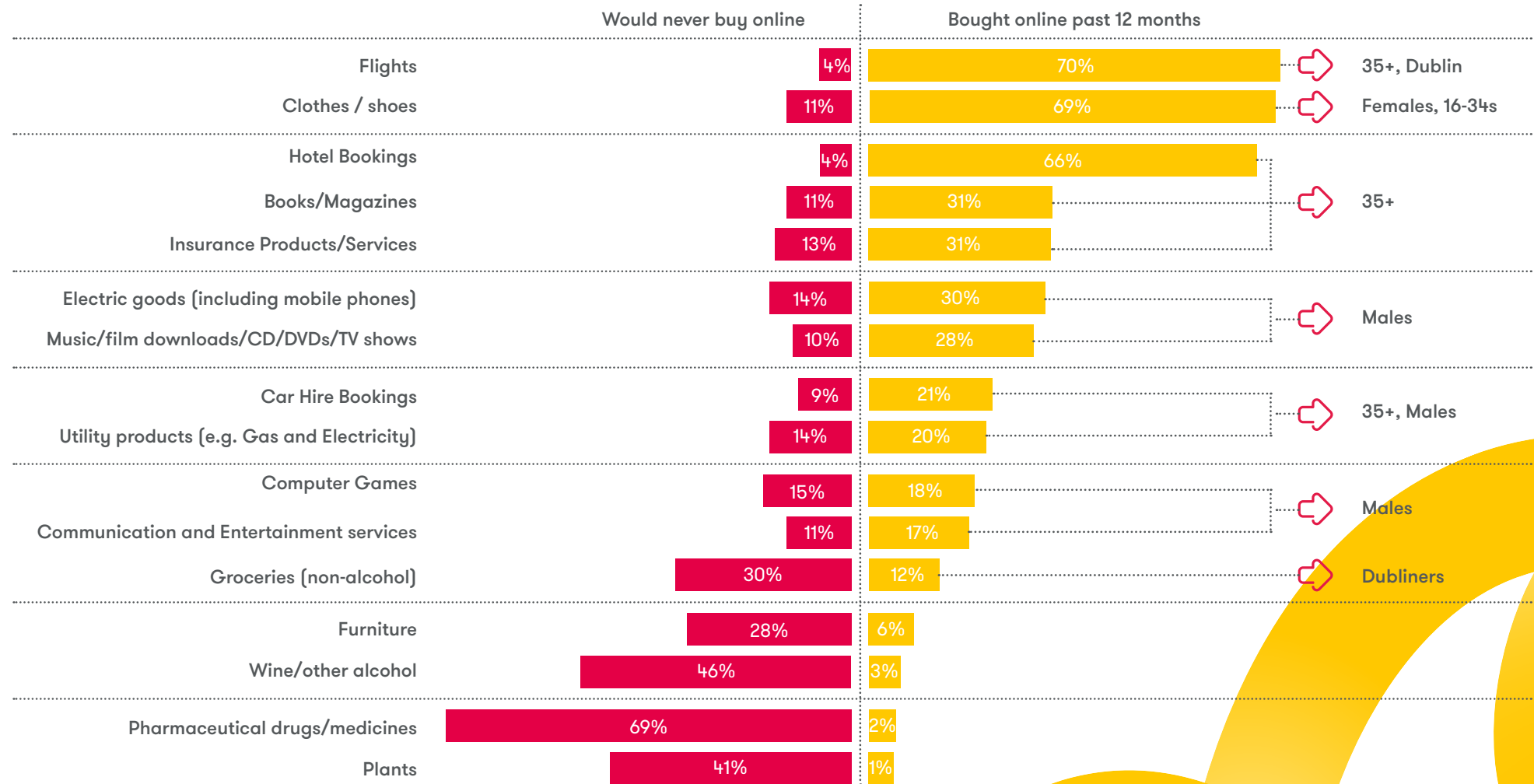


Question: Do you ever buy items online nowadays?

Clothes now vying with flights and hotels to be the top online category



Base: All buy online 604



Question: Which, if any, of the following types of products have you bought online in the past 12 months?
Question: And which, if any, of the following types of products would you never buy online?

.....
 Half of online purchasers
 are worried about fake
 online reviews as they
 read and rely on good
 quality reviews before
 booking or buying online

.....
 Tailoring of products/
 services to interests
 based on personal data
 liked by half of 16-34s

.....
 Over one third of online
 purchasers agree they
 focus more on negative
 online reviews than
 the positive ones



Key theme 7

.....
Data is everywhere and
people are concerned



Those under 50 more concerned about their Data privacy



Base: All buy online 604

% Agree	Total	Age		Age					Age 2		Region					
		Male	Female	16-24	25-34	35-49	50-64	65+	16-49	50+	Dublin	Outside Dublin	All Leinster	Leinster Ex Dublin	Munster	Conn/ Ulster
Base:	1013	488	525	139	212	299	215	148	650	363	280	733	536	256	300	177
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Data privacy in general is an area that increasingly concerns me	65	61	68	69	66	73	61	48	70	55	61	66	64	67	66	64
I am concerned about online companies sharing my data with other organisations	62	63	62	68	64	74	57	39	69	49	62	63	60	58	68	63
I am concerned about the amount of my personal data held online nowadays	62	62	62	67	64	72	58	42	68	51	58	64	60	62	66	63
I often worry that someone will share something about me on social media that I don't want shared e.g., information, an image etc.	46	43	49	64	54	53	35	22	55	29	37	50	41	46	53	51
I feel I still have control of my personal data	45	43	47	58	49	48	37	31	51	34	45	45	45	45	54	34
I often worry that I'll lose the photos I have on my devices, because I haven't backed them up anywhere	42	38	47	60	49	50	32	15	52	25	40	43	39	38	49	42

Those outside Dublin particularly concerned about social media



Question: And to what extent do you agree or disagree with each of the following regarding security concerns?

Data privacy concerns also emerged more for other urban centres outside Dublin, and parents

Base: All adults 16+ - 1,013

% Agree	Total	Region			Parents of Children		Smartphone	
		Dublin	Urban (excluding Dublin)	Rural	Any 5-17yrs	None 5-17yrs	Yes	No
Base:	1013	280	349	384	300	713	698	273
	%	%	%	%	%	%	%	%
Data privacy in general is an area that increasingly concerns me	65	61	72	61	71	62	73	50
I am concerned about online companies sharing my data with other organisations	62	62	68	59	70	59	71	49
I am concerned about the amount of my personal data held online nowadays	62	58	70	59	70	59	69	50
I often worry that someone will share something about me on social media that I don't want shared e.g., information, an image etc.	46	37	55	46	52	44	54	32
I feel I still have control of my personal data	45	45	47	44	52	42	53	32
I often worry that I'll lose the photos I have on my devices, because I haven't backed them up anywhere	42	40	48	39	54	38	52	25



Question: And to what extent do you agree or disagree with each of the following regarding security concerns?

Key theme 8

.....
We are becoming a nation
of online Doctors



The internet is now the first port of call for one quarter of the population

Base: All adults 16+ 1013



Question: To what extent do you agree or disagree with each of the following?

Half of those whose first port of call is the internet for medical advice have admitted they have been unnecessarily worried about their health after reading something online

% Agree	Total	Internet – 1st Place to look seeking Medical advice	
		Agree	Disagree
Base:	1013	252	630
	%	%	%
I have unnecessarily worried about my health after reading something online	21	55	9
I would be likely to visit the doctor if I read something negative online about my health	22	50	13
I would be willing to order pharmaceutical products online	7	23	2
The internet is usually my first port of call when seeking medical advice	25	100	-



Question: To what extent do you agree or disagree with each of the following?

.....
Currently only 7% of
the population would
be willing to order
pharmaceuticals
online
.....



eir

Thank you

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