



TechScape 2018

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Behaviour & Attitudes
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Format

- Introduction
- Top TechScape facts
- Core TechScape findings
- Generational insights








Introduction

- Techscape is conducted on our face-to-face CAPI Omnibus amongst a fully representative sample of 1,000 adults aged 16+ years.
- The sample is stratified by age within gender by town size across 63 sampling points nationwide. An overall socio-economic status quota is also applied.
- As such, the sample is fully representative of all Irish adults, and not limited solely to the online population.
- The fieldwork for this study was conducted between the 16th – 26th January 2018.



Introduction

- In order to gain deeper insight into the tech habits of Irish consumers, **generational analysis** has been conducted on the findings from this years Techscape.
- The definitions of each generation have been detailed below:

Generation	Born	Age	Proportion in population (based on 16+)	
Generation Z	1997-2002	16-21	8%	
Millennials	1978-1996	22-40	36%	
Generation X	1966-1977	41-52	20%	
Baby Boomers	1947-1965	53-71	26%	
Silent Generation	≤1946	72+	7%	



Top tech facts



Top tech facts



Smartphone ownership among the **over 50s** is continuing to grow.

43% have a **Smart TV** or 4K TV.

1 in 14 (253,000) have a wearable device – mainly under 50s, ABC1s and Gen X.

80% of the population now access the internet once a day or more often (higher among Gen Z and Millennials) – **14%** of the population still don't use the internet.

3 Tier Ireland still exists as discrepancies in frequency of **internet usage and ownership of on the go devices** is evident between those living in Dublin, other urban, and rural locations.

1.6m (**43%**) now watch **Netflix** (76% among Gen Z) and almost half a million (**13%**) are **online gamers** (47% among Gen Z).

Seamless viewing: One third (33%) connect a device to their TV to play programmes, video or music.

The Power of YouTube: **80%** of under 50s have watched online video content in the past 7 days – mainly through YouTube. 41% of Gen Z do so out of home.

Integrated shopping experience: **57%** purchase goods or services online and **38%** have researched products on their mobile while in a store..

Half (49%) check emails, texts or social media last thing at night or first thing in morning (down from 60% in 2017 – indicating a desire to control our usage).

47% worry about data security – 58% among Gen Z and Millennials.





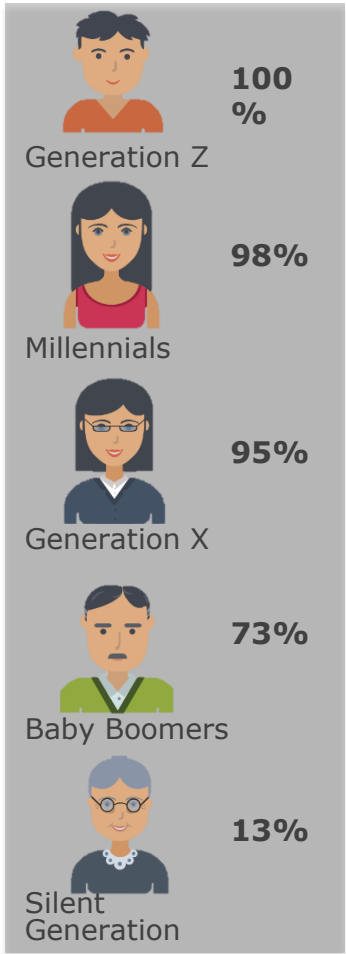
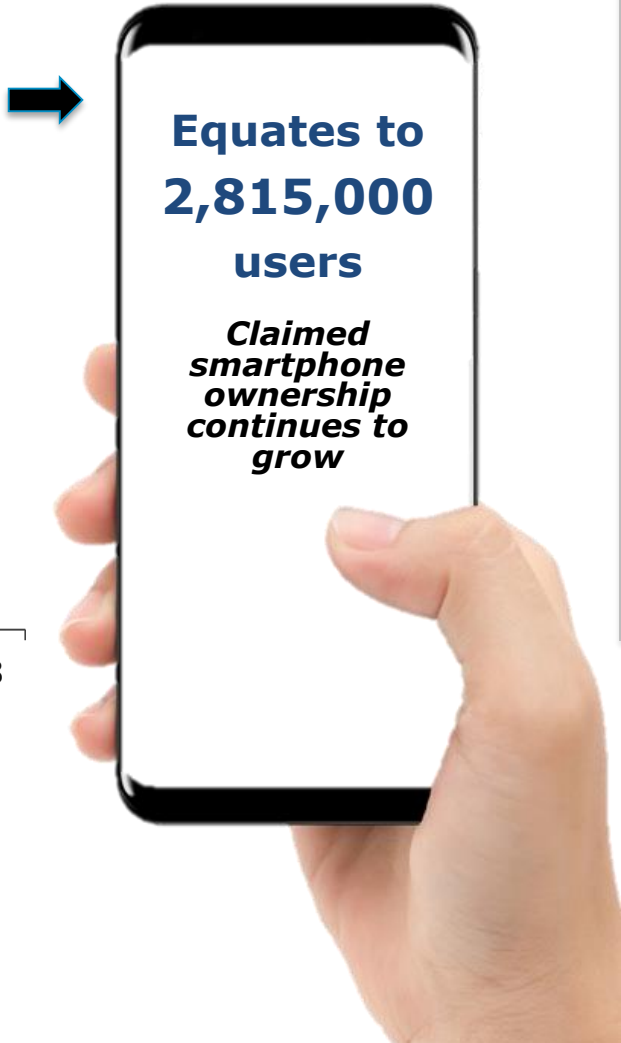
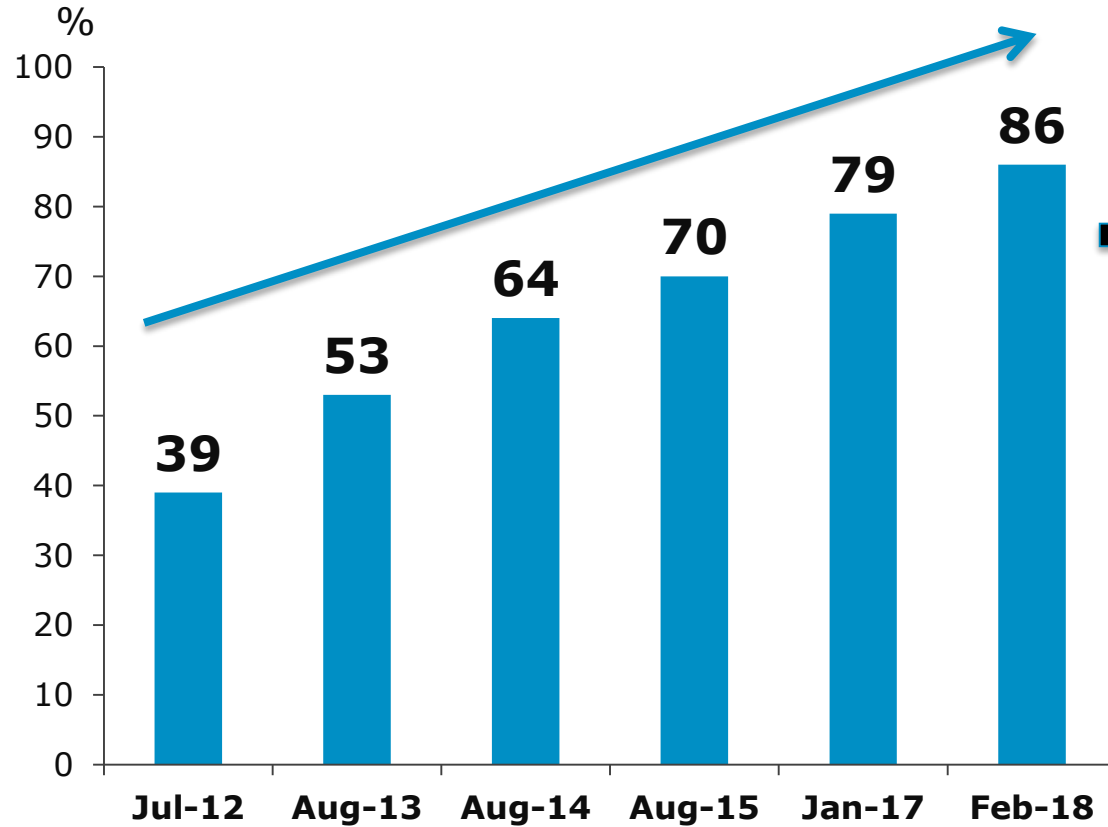
Core TechScape findings



Almost 9 in 10 mobile phone users now have a smart phone

Base: All with mobile - 881

Smartphone Ownership



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



Q. Which of the following devices do you currently use?

1 in 14 have
a wearable
digital device
(mainly under 50s and
ABC1s)




253,000 at
national
population level




 **9%**
Generation Z

 **9%**
Millennials

 **11%**
Generation X

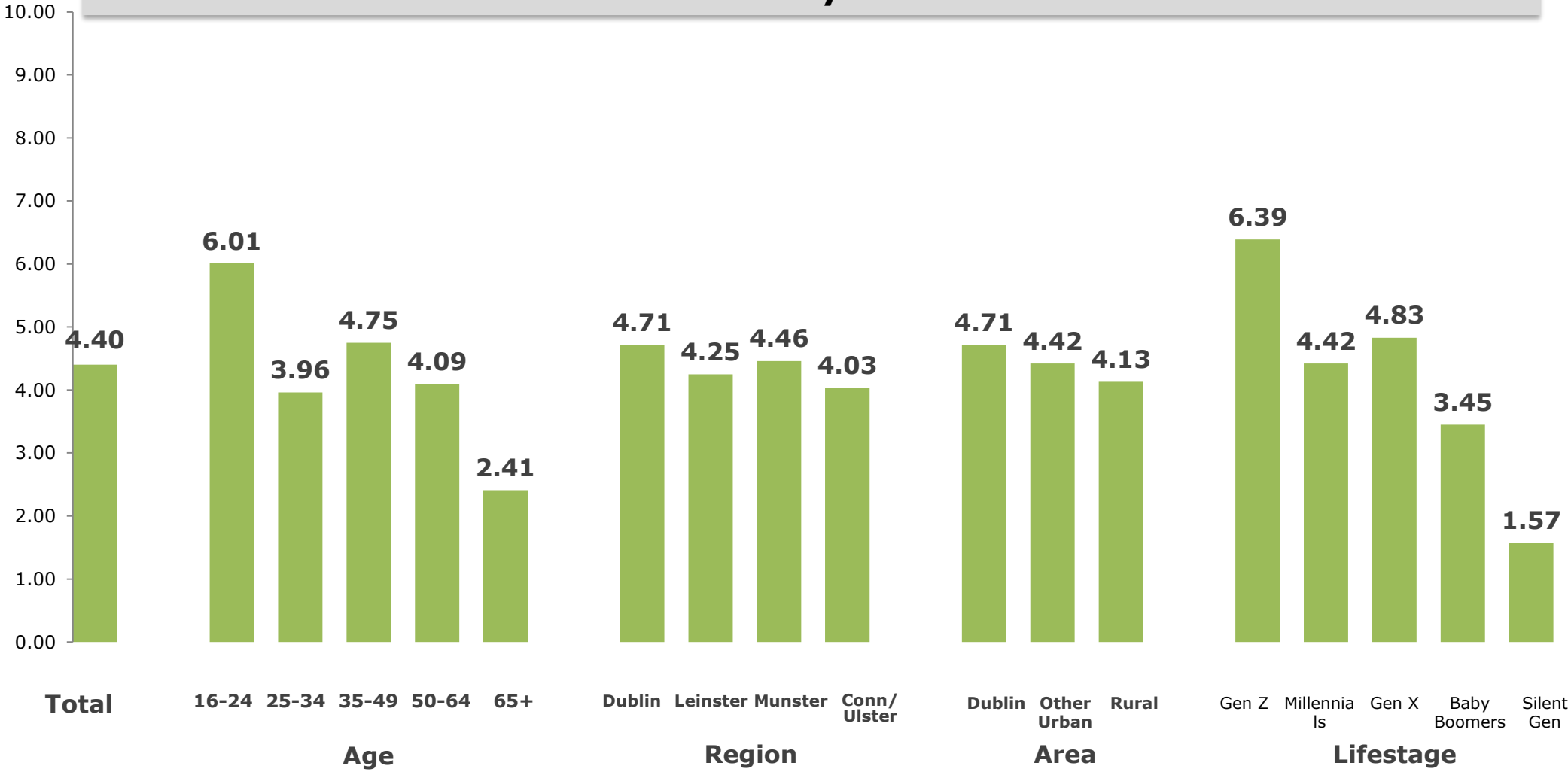
 **3%**
Baby Boomers

 **0%**
Silent
Generation



On average Irish homes have access to 4 Potential Online On-the-Go Devices* at home

February 2018



Generation Z have access to the highest number of potential on-the-go devices, followed by Generation X and Millennials

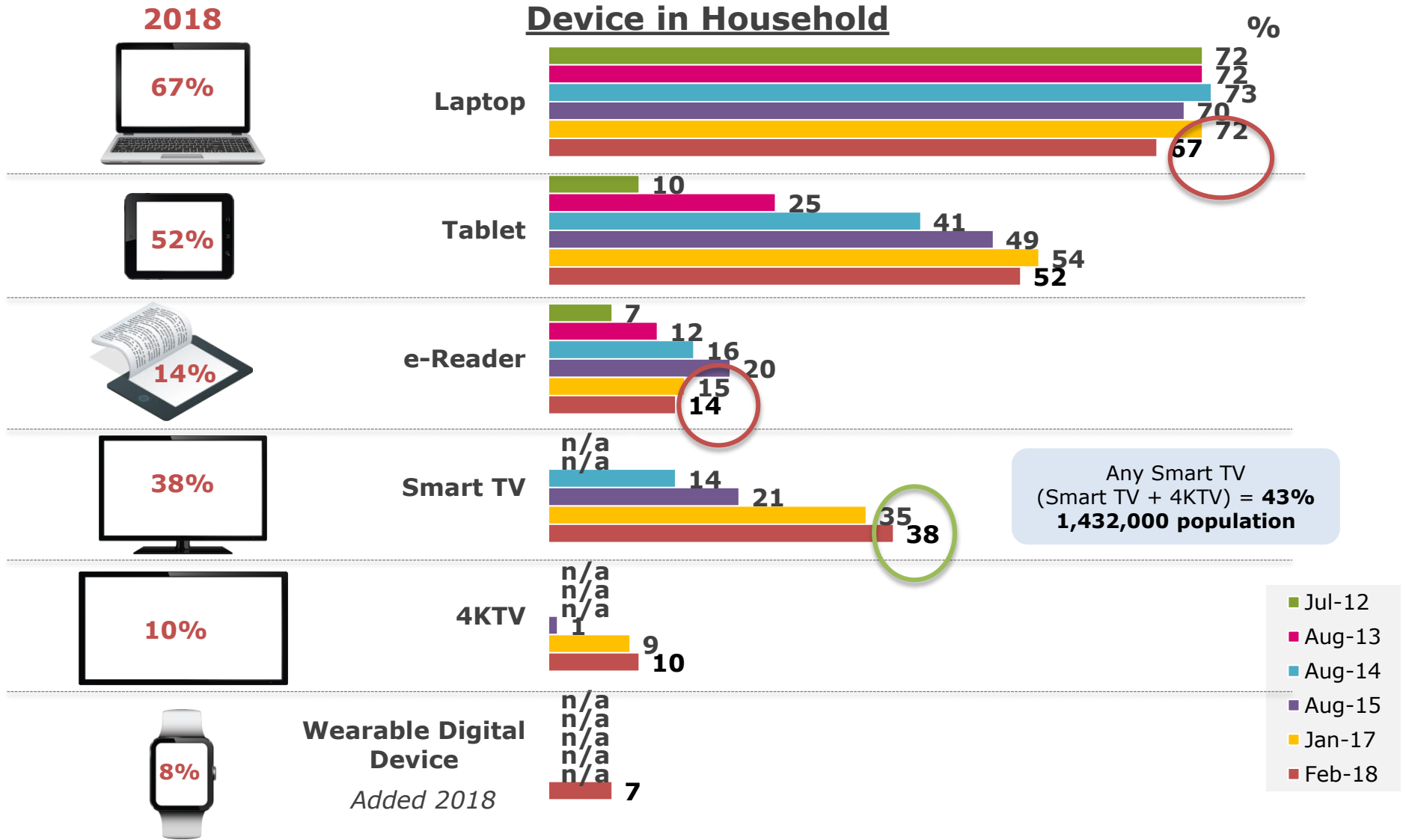


Q. And how many are in the household?

***Potential online OTG device definition: Laptop/iPad, eReader, Smartphone, wearable devices**

Smart TV growth continues to increase, while e-readers and laptops decline

Base: All adults aged 16+ - 1,000



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

Gradual slippage of e-readers evident, laptops also showing signs of decline, while Smart TVs are increasing.

Q. Which of the following devices do you currently use?




98%
Generation Z


96%
Millennials


89%
Generation X


62%
Baby Boomers


11%
Silent Generation



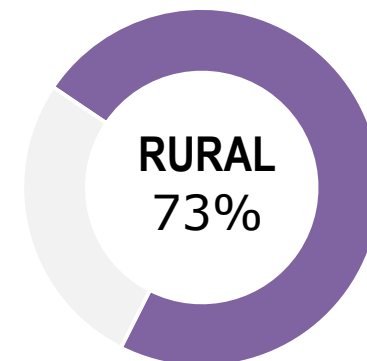
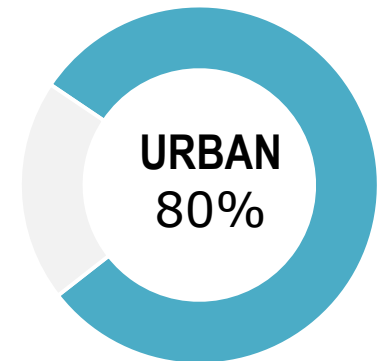
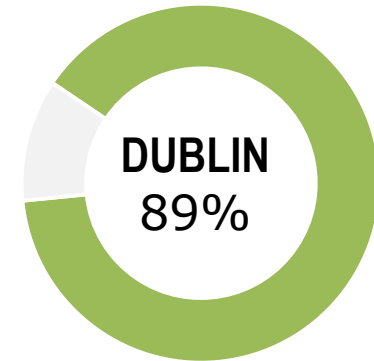
80%
now access the
internet
once a day or more
often

(almost all under 35s are
now online at least once a
day)

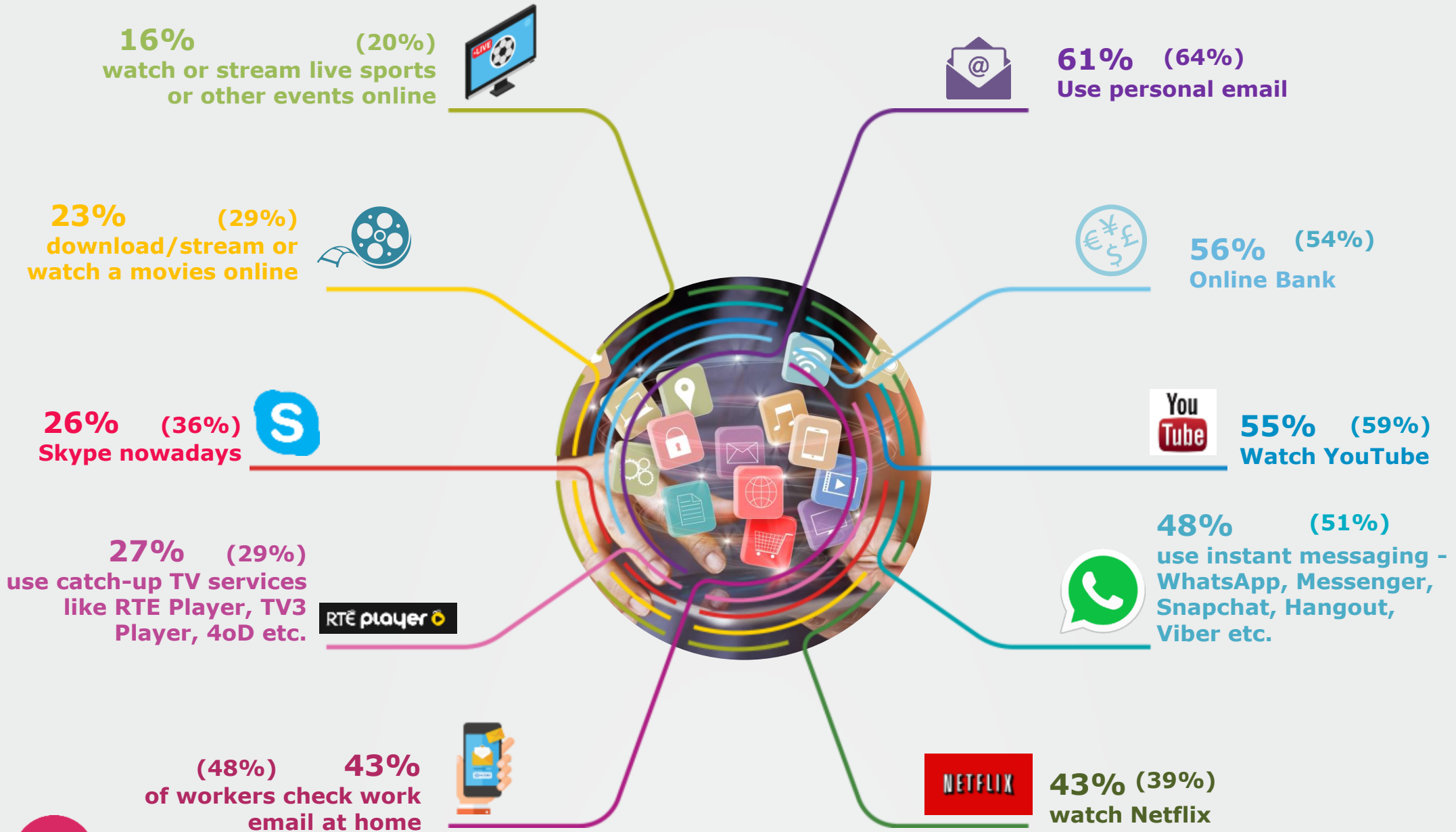
14% of population
never access the
internet

**3 tier
online
Ireland**

Incidence of daily internet use



What online services are we using ...



Q. Which of these do you do nowadays anywhere?

() = Feb 2017 data

Netflix viewers and gamers are on the rise

Netflix



1.6 million (**43%**) of us now watch **Netflix**
(up from 39% in 2017)



Rises to 76% among Generation z and 58% amongst millennials

Gamers



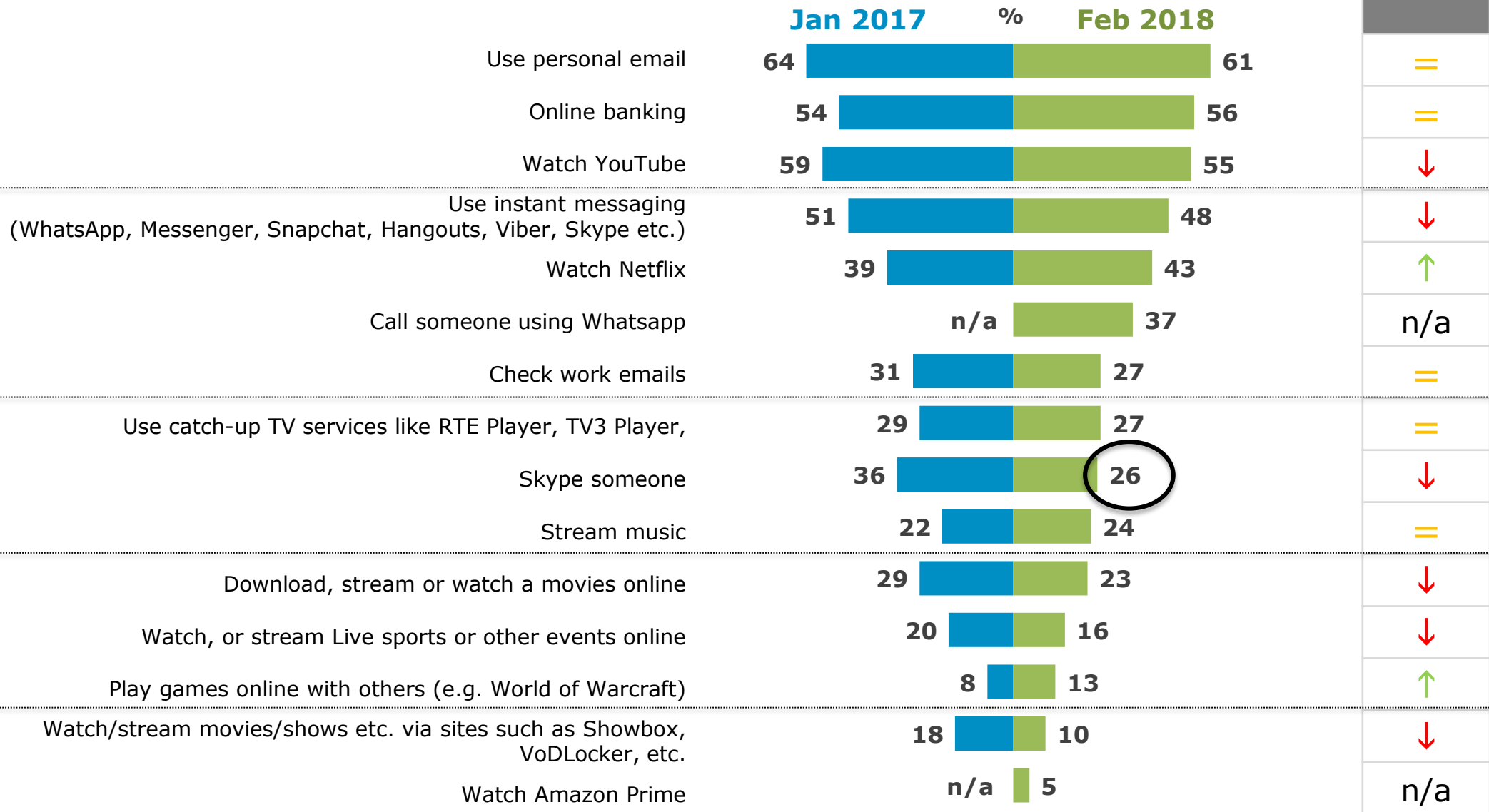
Almost half a million (**13%**) of us are **online gamers**
(475,000 pop)
(Up from 8% in 2017)



Rises to 47% among Generation z

Online service usage (anywhere): 2018 vs 2017

Base: All adults 16+ - 1,000



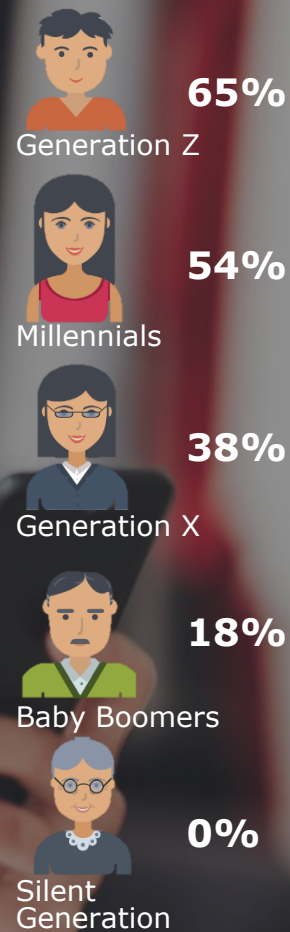
Increase in watching Netflix and playing games online. Less illegal streaming due to convenience of paid streaming services and catch-up TV. Skype usage has declined most dramatically – could be due to popularity of WhatsApp.

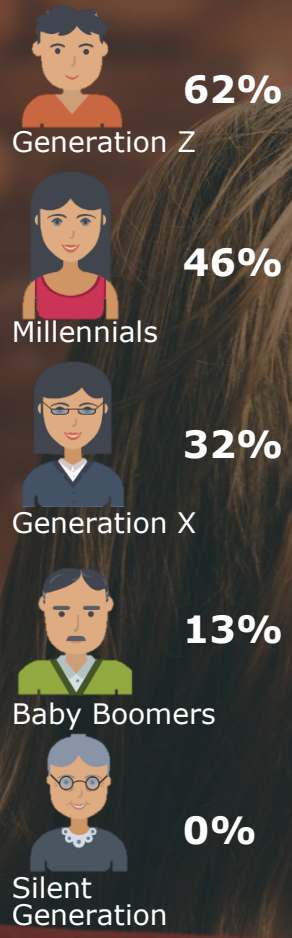
Q. Which of these do you do nowadays anywhere?

2 in 5
Irish
consumers
desire an
integrated
shopping
experience



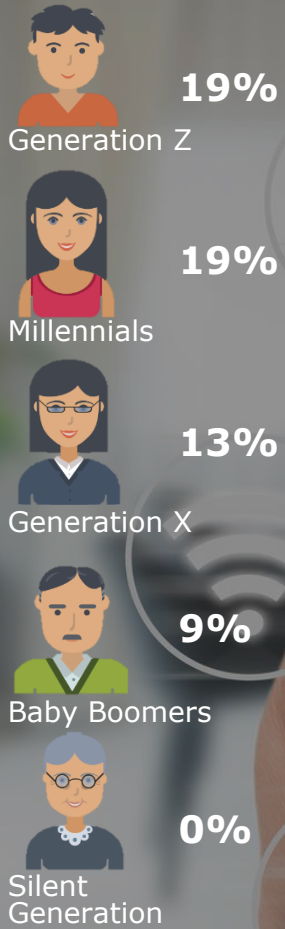
(38% claim to
research
products on
their phone
when in a store)





Seamless viewing: 33%
connect their tablet, laptop or mobile phone to their TV to play programmes, videos, or music.






**Internet of things:
14% turn on heating or other household devices remotely via an app.**






58%
Generation Z




58%
Millennials



47%
Generation X



32%
Baby Boomers



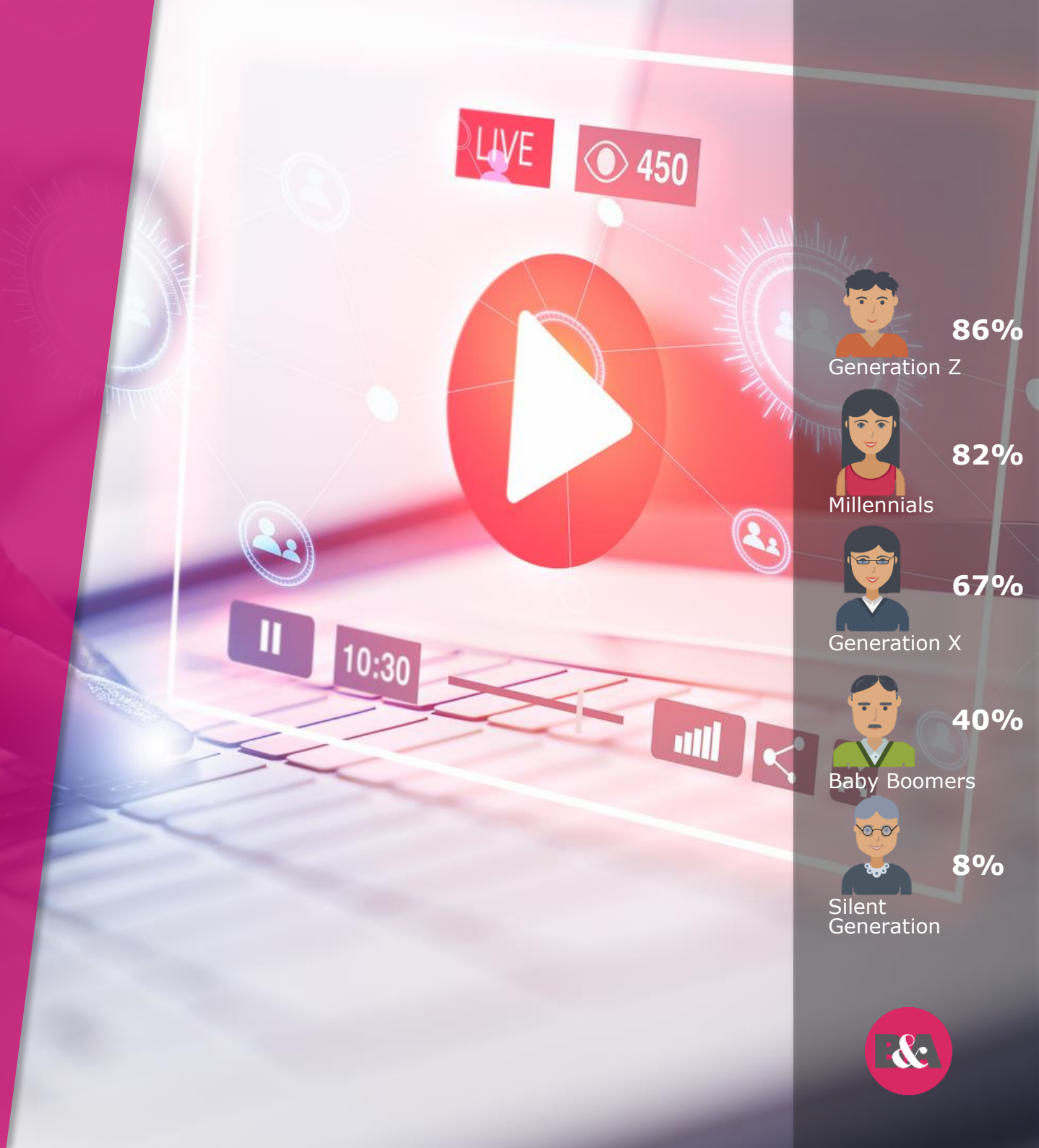
20%
Silent Generation

47%
**worry about
data privacy
online**

(Mainly under
50s and ABC1s)



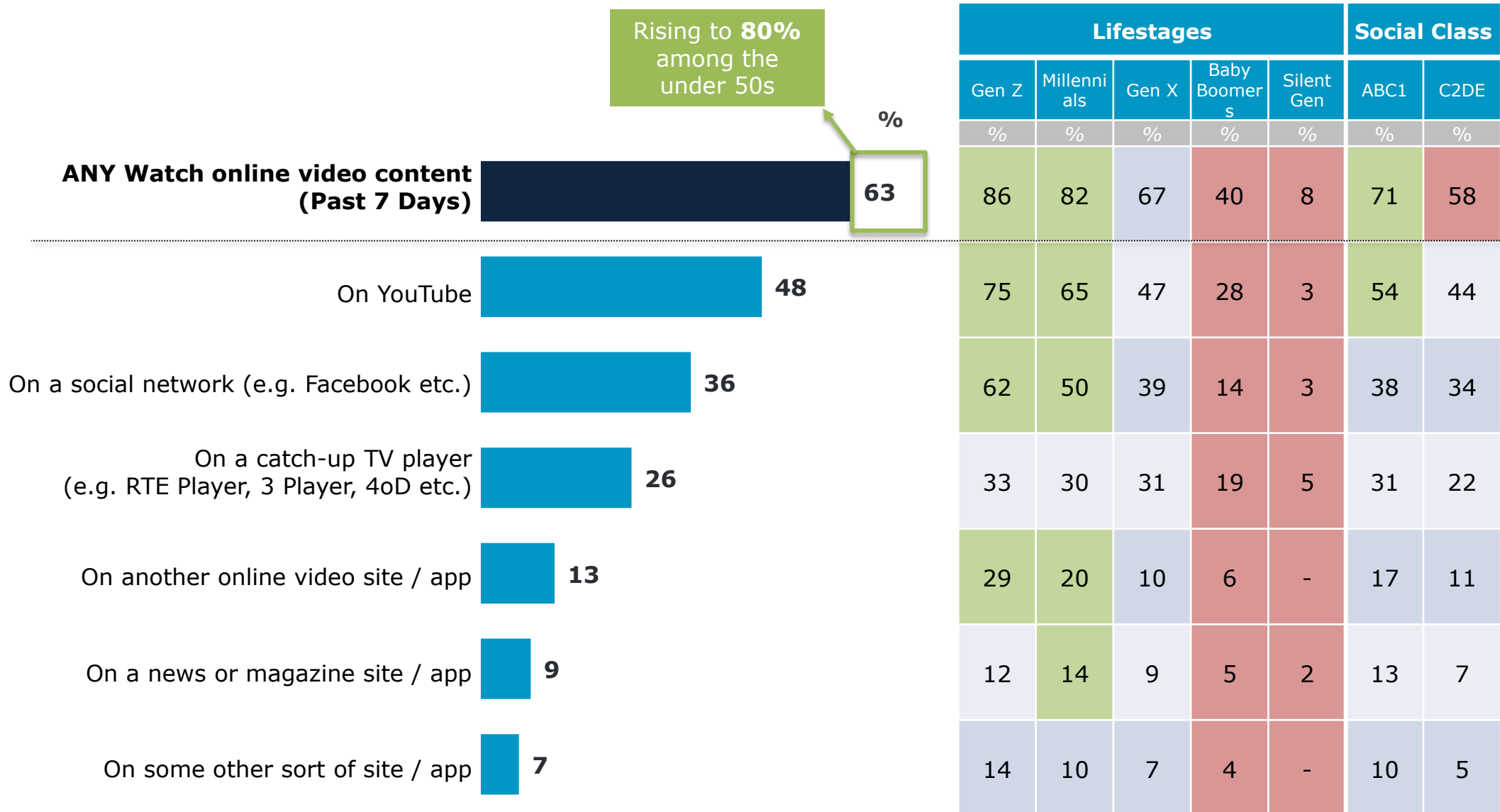
80%
of under 50s
have watched
any online video
content in the
past 7 days.



The Power of YouTube: 63% have watched online video content in past 7 days

Base: all Adults 16+ - 1,000

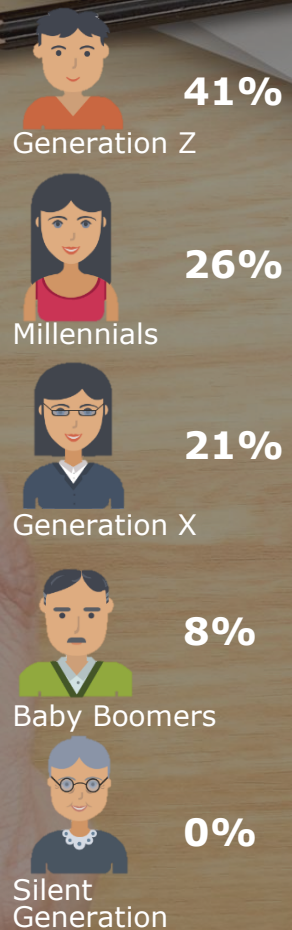
Significantly higher
Significantly lower



80% of under 50s have watched online video content in past 7 days, with YouTube being the most popular.

Q. Did you watch any online video(s) content (e.g. short videos or programmes, etc.) via any of the following websites or apps in the past 7 days?

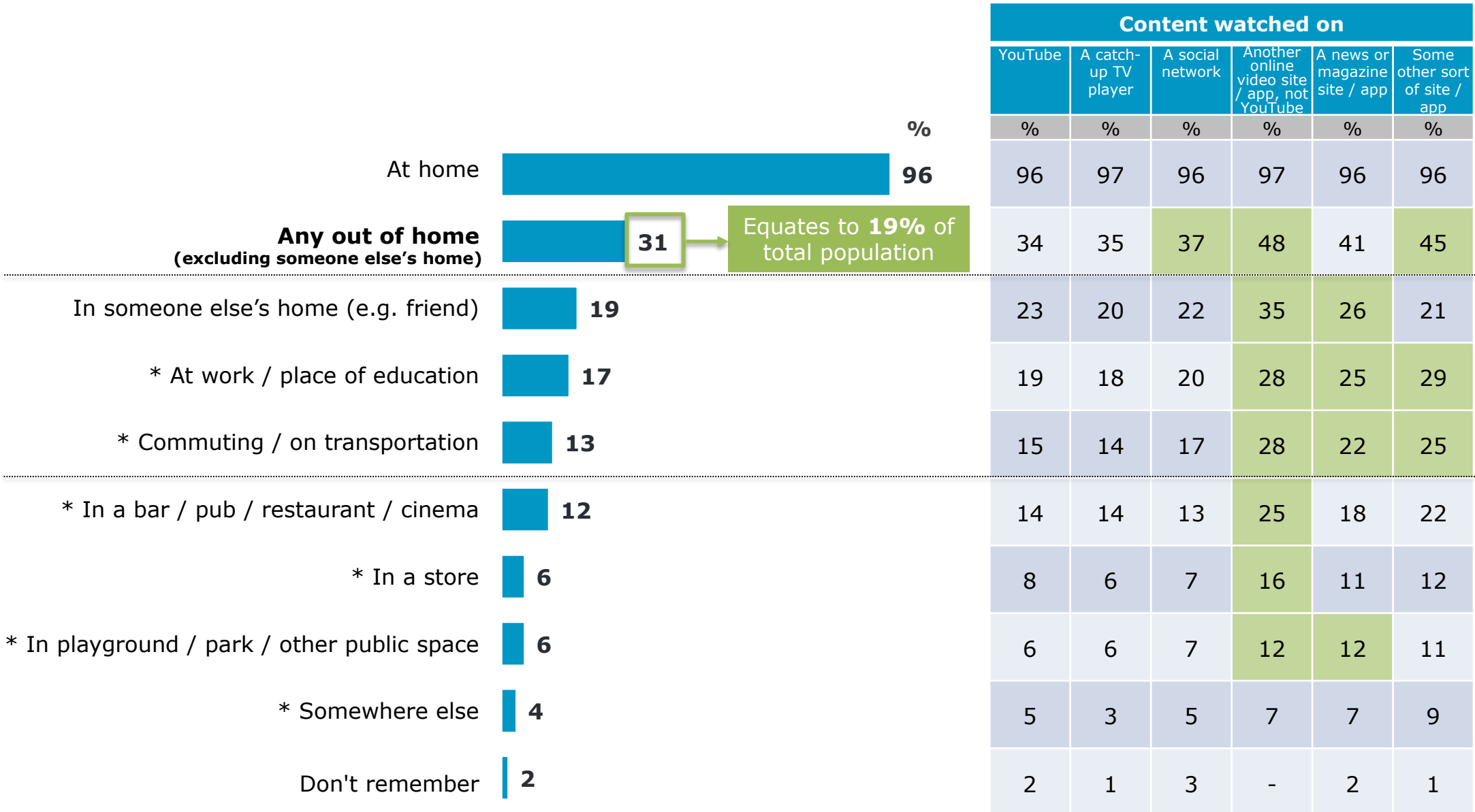
19%
of the
population
(717,000) have
watched online
video content
out of home
over the past 7
days



Online video content is predominantly watched at home

Base: all Adults who watched online videos in past 7 days - 625

Significantly higher
Significantly lower







* Included in any out of home overcode

Location of watching online videos x demographics

Base: All Adults who watched online videos in past 7 days - 625

Significantly higher
Significantly lower

	Total				
		Gen Z	Millennials	Gen X	Baby Boomers
Base:	625	62	273	144	118
	%	%	%	%	%
At home	96	100	95	97	92
Any out of home (excl. doing someone else's)	31	48	31	31	19
In someone else's home (e.g. friend)	19	46	22	10	7
*At work / place of education	17	33	18	14	9
*Commuting / on transportation	13	32	12	12	6
*In a bar / pub / restaurant / cinema	12	21	12	10	5
*In a store	6	17	7	4	2
*In playground / park / other public space	6	10	8	2	2
*Somewhere else	4	5	5	3	2
Don't remember	2	-	3	2	3

Silent Generation base too small for analysis

* Included in any out of home overcode

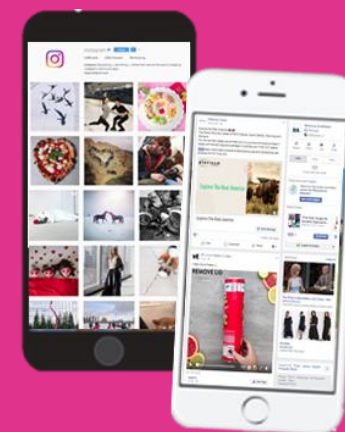
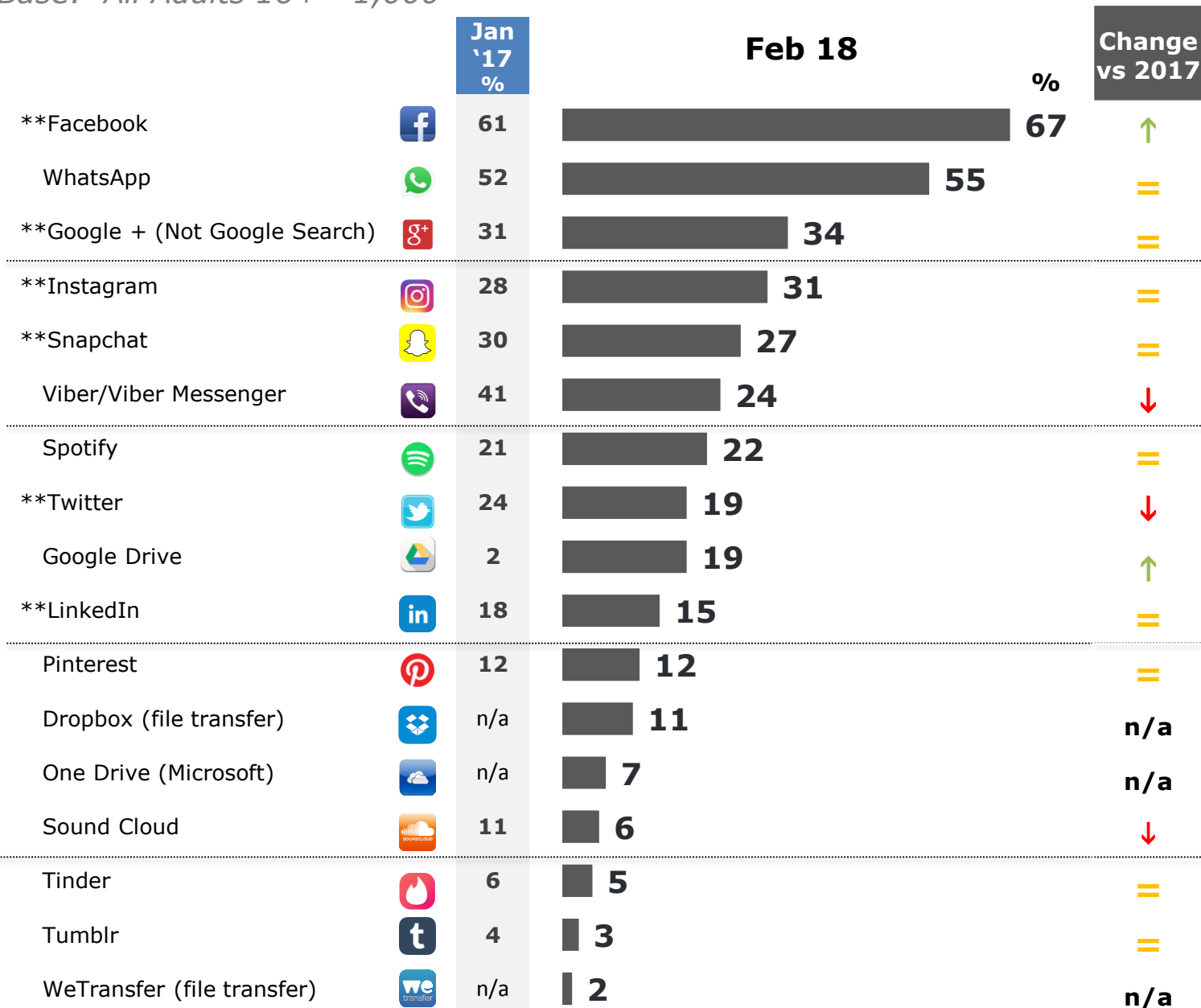
Genz most likely to be watching online video content across a number of locations: in someone else's home, at work/place of education, when commuting.

Q. In which of the following locations did you watch online video(s) in the past 7 days?



Facebook and WhatsApp are the most popular social media and OTT services we use in 2018

Base: All Adults 16+ - 1,000



****Any Social Media usage nowadays = 75% (70% in 2017)**


















Facebook usage has increased while declines are evident across Viber/Viber messenger, Twitter and Sound Cloud vs 2017

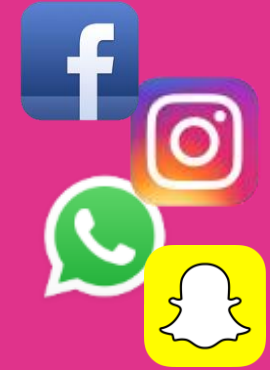
Pre-January 2017 comparable data from eir Connected Living Survey 2015

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

Facebook, Instagram, WhatsApp and Snapchat most used social networks and OTT services among 16-24 year olds

Base: All 16-24s -116

		Jan '17 %	Feb 18 %	Change vs 2017
Facebook		89	95	=
Instagram		68	75	=
WhatsApp		73	70	=
Snapchat		73	68	=
Google + (Not Google Search)		53	49	=
Spotify		51	46	=
Twitter		47	39	=
Viber/ Viber Messenger		65	35	↓
Google Drive		n/a	32	n/a
Pinterest		17	23	=
LinkedIn		22	20	=
Dropbox (file transfer)		n/a	20	n/a
One Drive (Microsoft)		n/a	18	n/a
Tinder		19	17	=
Sound Cloud		32	13	↓
Tumblr		7	7	=
WeTransfer (file transfer)		n/a	5	n/a



Apart from Facebook, Instagram, WhatsApp, and Snapchat are used most amongst 16-24s.

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

Social media usage nowadays x demographics

Base: All Adults 16+ - 1,000



■ Significantly higher
■ Significantly lower

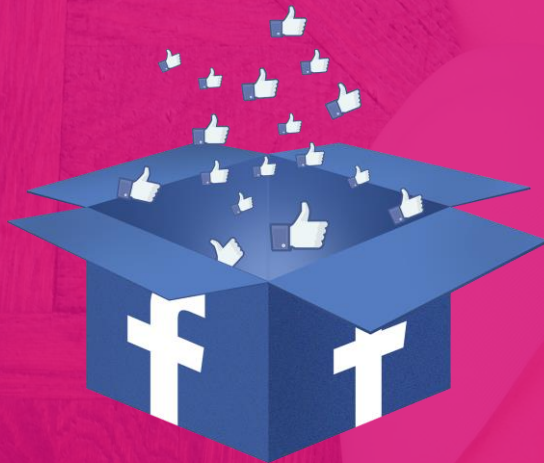
	Total	Gen Z	Millennials	Gen X	Baby Boomers	Silent Gen
Base:	1000	73	332	213	279	71
	%	%	%	%	%	%
ANY SOCIAL MEDIA	75	100	95	84	50	9
Facebook	67	98	89	72	40	5
What's App	55	75	69	61	36	5
Google + (Not Google Search)	34	45	45	41	22	6
Instagram	31	85	48	21	6	-
Snapchat	27	76	44	18	3	2
Viber/ Viber Messenger	24	39	34	23	12	-
Spotify	22	52	34	15	5	-
Twitter	19	47	25	19	7	-
Google Drive	19	33	22	21	10	2
LinkedIn	15	18	23	15	6	2
Pinterest	12	18	20	10	5	-
Drop Box (file transfer)	11	16	17	11	6	2
One Drive (Microsoft)	7	18	10	7	3	-
Sound Cloud	6	15	9	3	2	-
Tinder	5	17	9	2	1	-
Tumblr	3	11	4	1	0	-
WeTransfer (file transfer)	2	2	3	1	1	-

9 in 10 under 50s are on some form of social media site.

Q. Which of these do you do nowadays at home?



We are spending on average
1 working day
(8 hours)
per week on
Facebook



All Facebook users: 663 base



-  **16hrs**
Generation Z
-  **9hrs**
Millennials
-  **5hrs**
Generation X
-  **6hrs**
Baby Boomers
-  **3hrs**
Silent Generation





Down from **60%**
in 2017




49% check
emails, text
messages, or
social media last
thing at night or
first thing in the
morning




 **69%**
Generation Z

 **56%**
Millennials

 **43%**
Generation X

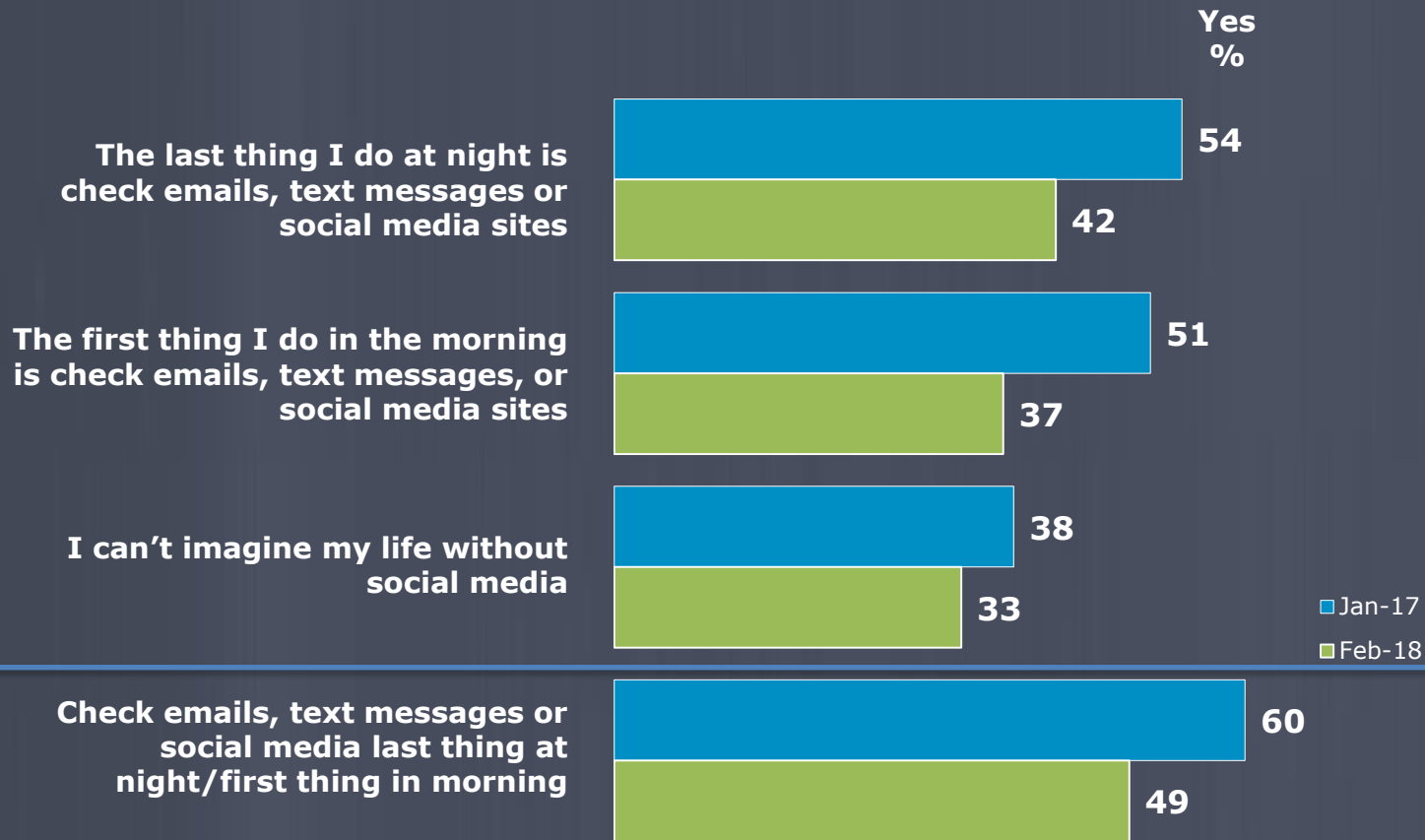
 **30%**
Baby Boomers

 **33%**
Silent
Generation



Have we begun to try and switch off or control our online engagement?

Base: All use social media sites - 734



Decline in those checking social media and email last thing at night and first thing in the morning.

Q. Here are some other things people have said about social media. Do you agree with these statements?



A young girl with blonde hair tied back, wearing a pink shirt, is sitting on a couch and holding a tablet. An older man with grey hair and a beard, wearing a light blue polo shirt, is sitting next to her, looking at the tablet and holding a newspaper. They are both smiling and appear to be engaged in a shared activity. The background shows a window with light coming through and a wooden shelf with some items.

Generational differences



Generation Z (16-21 year olds)

Technaholics

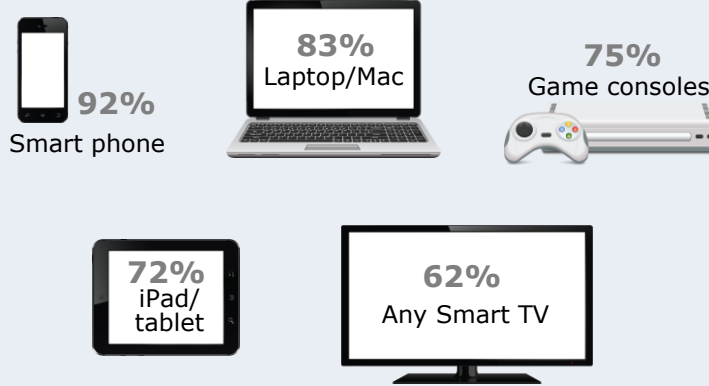


8%
300K

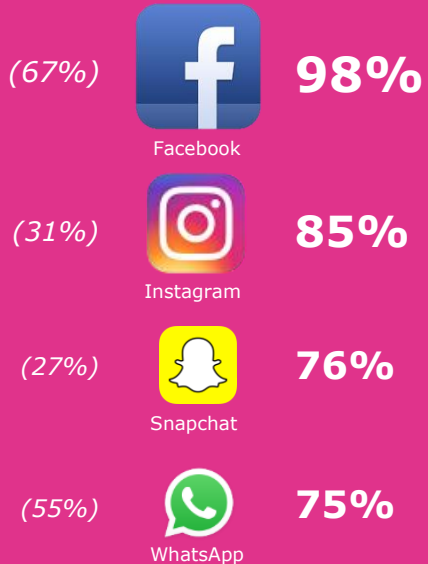
100%
Any social media usage

6 = Average number of On the Go Devices (OTG).

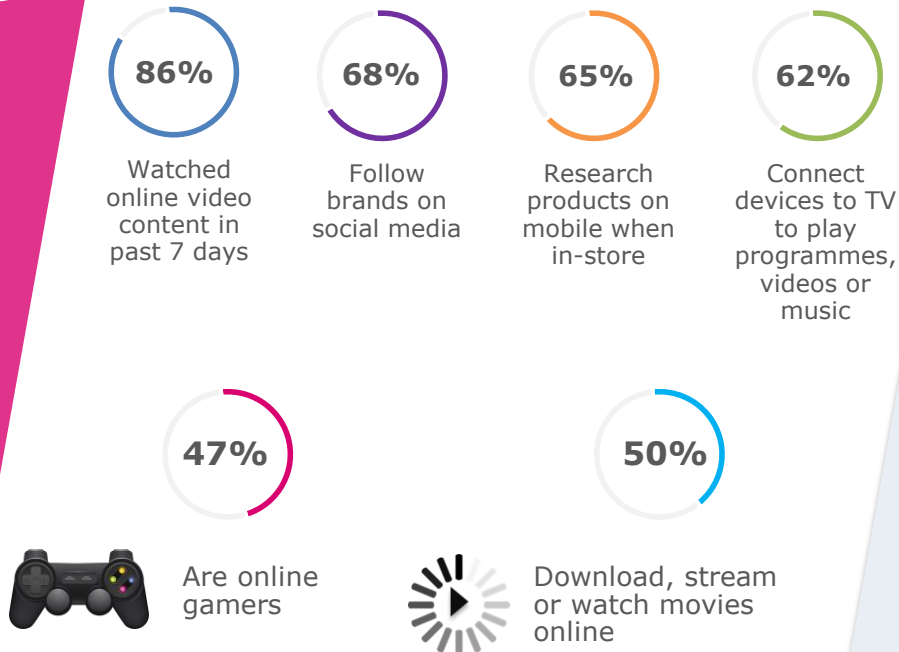
Device ownership



Top social media



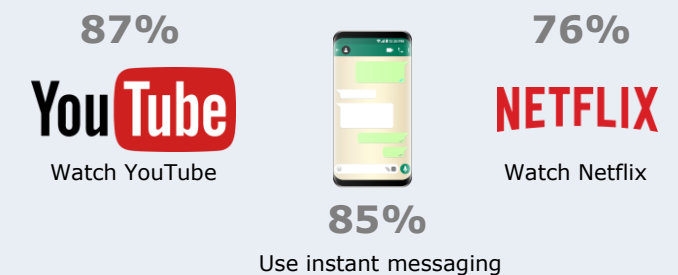
What else they are doing online



Top online activities



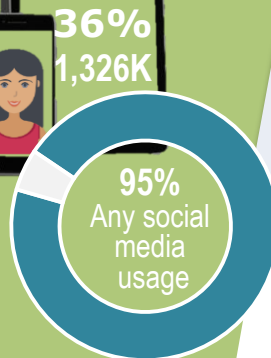
Top 3 online services



Millennials (22-40 year olds)

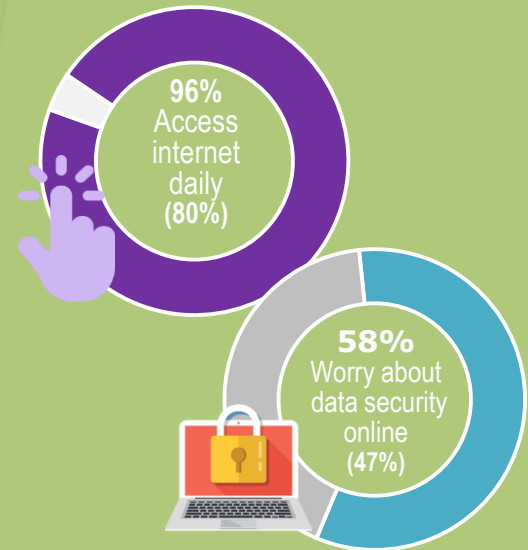
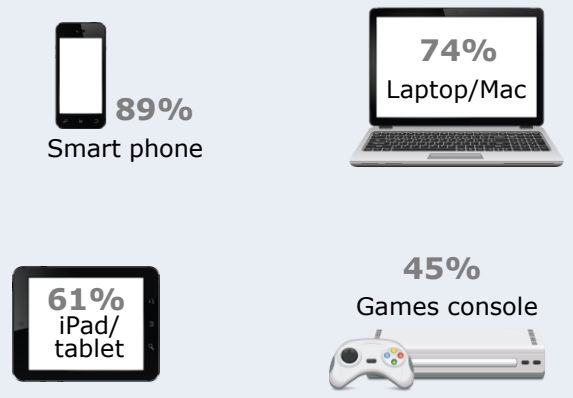


Tech committed



4 = Average number of On the Go Devices (OTG).

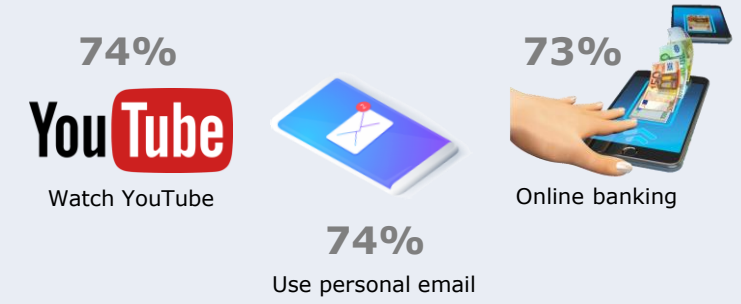
Device ownership



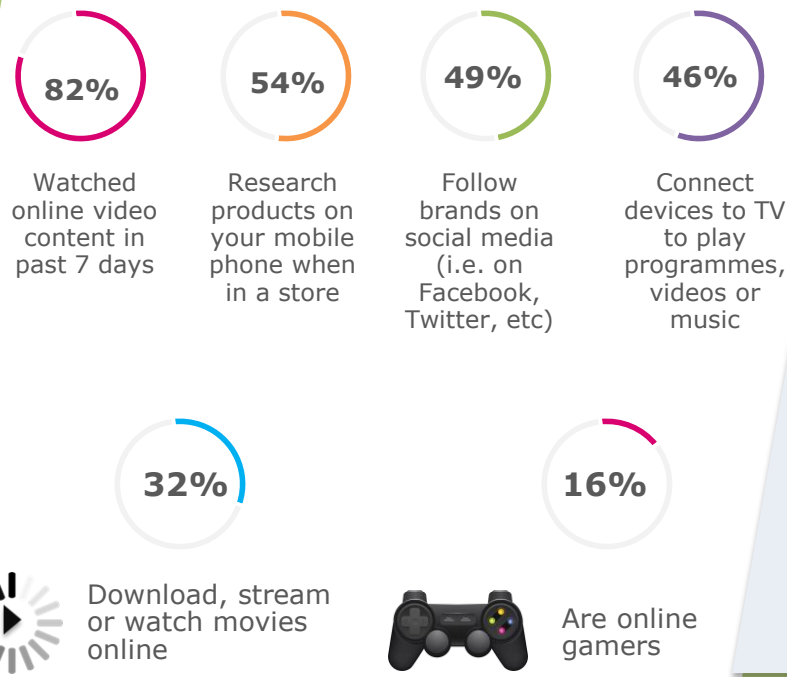
Top online activities



Top 3 online services



What else they are doing online

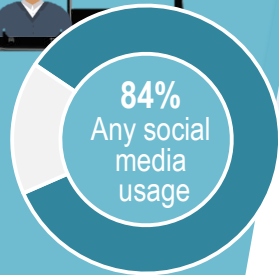


Top social media



Generation x (41-52 year olds)

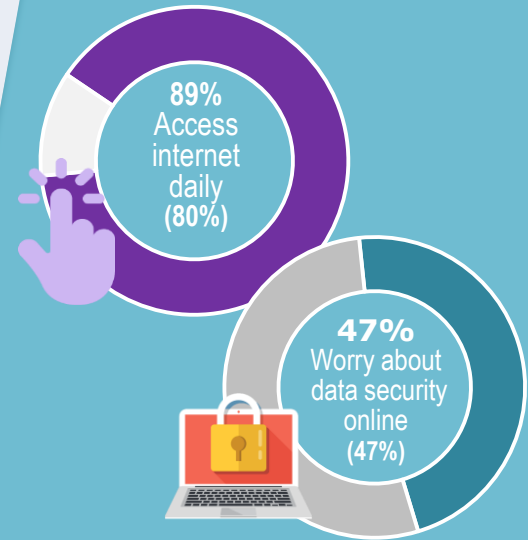
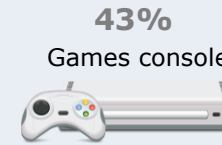
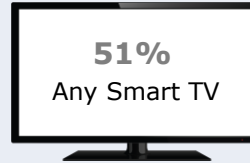
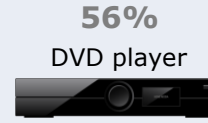
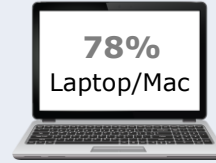
Tech connected



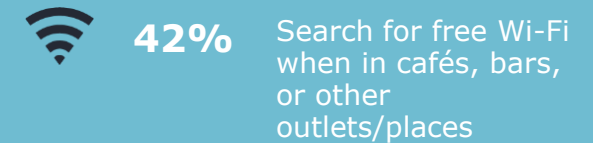
20%
741K

5 = Average number of On the Go Devices (OTG).

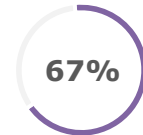
Device ownership



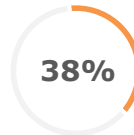
Top online activities



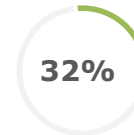
What else they are doing online



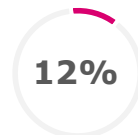
Connect devices to TV to play programmes, videos or music



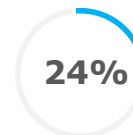
Research products on your mobile phone when in a store



Follow brands on social media (i.e. on Facebook, Twitter, etc)

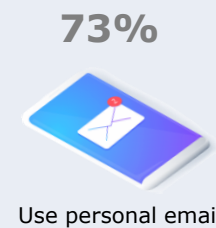


Are online gamers

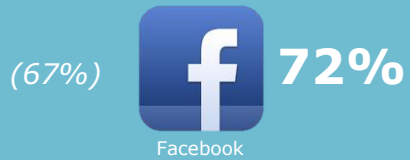


Download, stream or watch movies online

Top 3 online services



Top social media



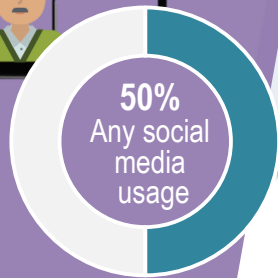
() = Market

Baby Boomers (53-71 year olds)

Tech laggards



26%
944K



3 = Average number of On the Go Devices (OTG).

Device ownership



60%
Smart phone



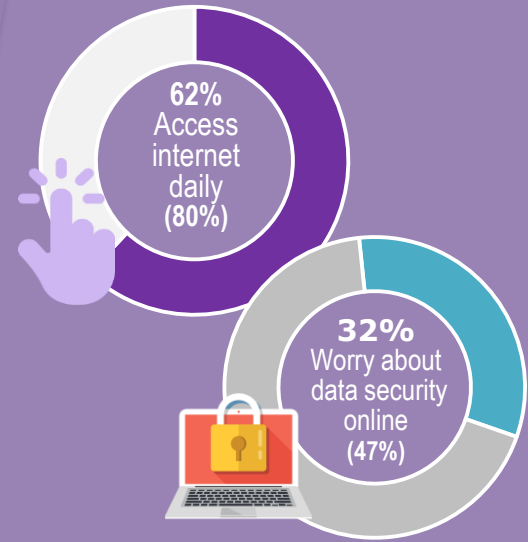
60%
Laptop/Mac



46%
DVD player



39%
iPad/
tablet



Top online activities



31% Purchase goods or services online



19% Search for free Wi-Fi when in cafés, bars, or other outlets/places



18% Share posts, videos, photo, etc online



18% Research products online when in store

Top social media

(67%)



Facebook

40%

(55%)



WhatsApp

36%

(34%)



Google +

22%

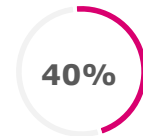
(24%)



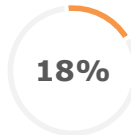
Viber

12%

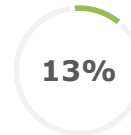
What else they are doing online



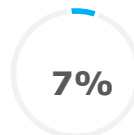
Watched online video content in past 7 days



Research products on your mobile phone when in a store



Connect devices to TV to play programmes, videos or music



Download, stream or watch movies online

Top 3 online services



44%
Use personal email



37%
Online banking

31%
You Tube
Watch YouTube

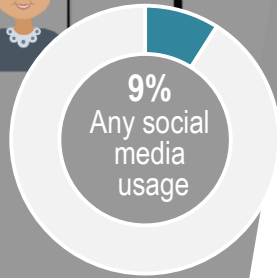
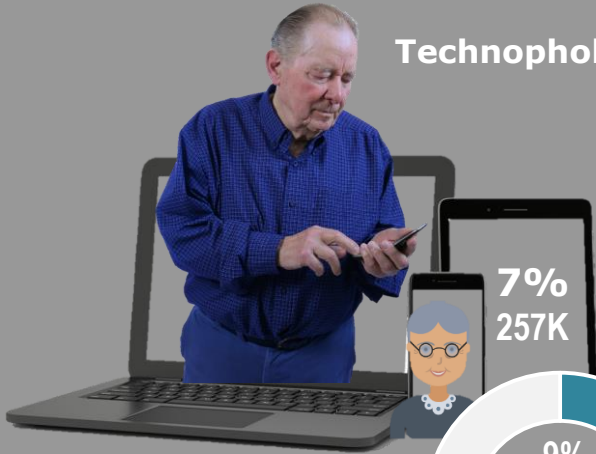


() = Market

Silent Generation

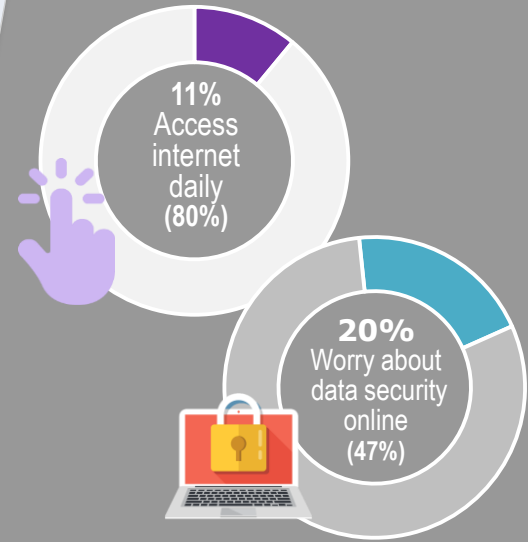
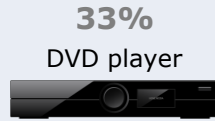
(72+ year olds)

Technophobes

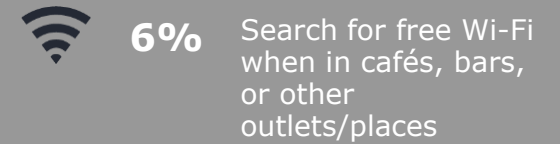


2 = Average number of On the Go Devices (OTG).

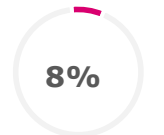
Device ownership



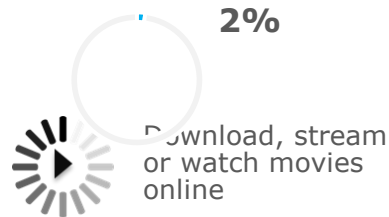
Top online activities



What else they are doing online



Watched online video content in past 7 days



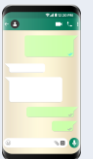
Top 3 online services



18%
Use personal email



10%
Online banking



6%
Use instant messaging

Top social media



() = Market

Thank You!

Delve

Deeper



MILLTOWN HOUSE
MOUNT SAINT ANNES
MILLTOWN
DUBLIN 6

+353 1 205 7500
info@banda.ie

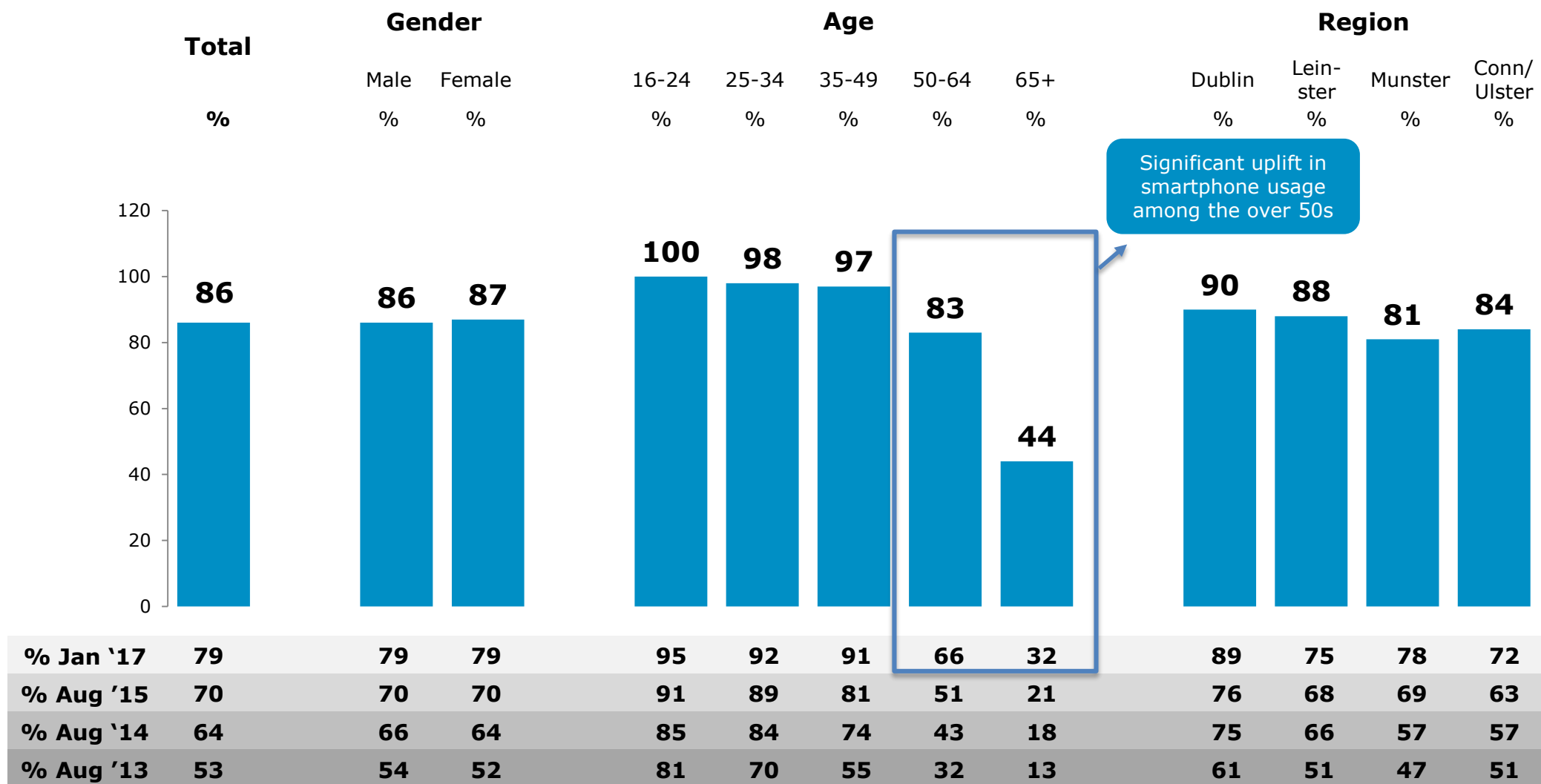
www.banda.ie

Appendix



Almost all under 50s are now smartphone enabled

Base: All with mobile - 881



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

Almost all under 50s with a mobile phone now have a smartphone, and smartphone ownership among the over 50s is increasing.

Q. Which of the following devices do you currently use?

Devices in the household x demographics

Base: All adults 16+ - 1,000

Significantly higher
Significantly lower

	Total	Age					Social Class		Region				Area		
		16-24	25-34	35-49	50-64	65+	ABC1	C2DEF	Dublin	Leinster	Munster	Conn/Ulster	Dublin	Other Urban	Rural
Base:	1000	116	169	291	248	176	443	557	302	249	276	173	302	382	316
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
- ANY POTENTIAL ON THE GO DEVICE	85	96	95	96	83	50	92	80	90	84	80	84	90	83	82
- ANY SMART TV	43	55	42	51	42	25	52	37	53	40	43	31	53	42	36
Smart TV set (one that connects directly to broadband and has apps built in – not a 4K TV)	38	49	37	45	38	20	48	32	47	37	36	30	47	39	31
Ultra 4K TV set (a TV set that delivers 4 times as much detail as 1080p Full HD – almost photographic in nature)	10	13	12	10	9	7	10	10	11	10	13	5	11	9	10
Games Consoles (eg X-box, Wii, PS2/3 /4 etc.)	34	59	44	46	21	2	38	32	27	43	34	34	27	37	37
DVD Player or recorder (separate to Virgin box or Sky Plus recording facility)	50	55	50	55	50	38	55	47	35	53	54	65	35	57	56
Desktop computer	20	24	17	21	22	15	29	14	24	16	21	16	24	23	14
Laptop/Mac	67	80	73	76	70	34	78	60	72	67	63	69	72	68	64
iPad or other tablet (including kids tablets such as Kurio, Meep etc.)	52	70	55	62	45	25	59	47	51	54	53	48	51	55	49
eReaders (eg Kindle, iRiver, Sony reader etc.)	14	14	11	18	15	7	17	11	15	10	13	17	15	12	14
Smart phone (e.g. iPhone, Samsung Galaxy etc.) which is a phone with advanced capabilities, such as the ability to download apps, go online etc.	76	91	87	92	69	35	84	71	83	78	69	72	83	73	74
Basic mobile which makes calls as well as sends and receives text messages	28	19	13	21	34	54	19	33	24	28	27	34	24	25	33
A digital device that can stream content from the internet on your TV screen (e.g. Apple TV, Chromecast, etc.)	15	16	18	21	8	6	17	13	15	19	12	12	15	15	14
Apps on a smart TV	16	29	16	21	13	5	20	14	18	17	18	12	18	17	14
A wearable digital device (like an activity wristband, e.g. Fitbit, Smartwatch or smart glasses)	7	10	10	10	4	0	9	5	8	7	7	5	8	7	6

Q. Which of the following devices do you currently use?

*Potential online OTG device definition: Laptop/iPad, eReader, Smartphone, wearable device

Devices in the household x demographics

Base: All adults 16+ - 1,000

Significantly higher
Significantly lower

	Total	Lifestages				
		Gen Z	Millennials	Gen X	Baby Boomers	Silent Gen
Base:	1000	73	332	213	279	71
	%	%	%	%	%	%
- ANY POTENTIAL ON THE GO DEVICE	85	96	95	96	77	21
- ANY SMART TV	43	62	45	51	37	10
Smart TV set (one that connects directly to broadband and has apps built in – not a 4K TV)	38	55	40	48	33	8
Ultra 4K TV set (a TV set that delivers 4 times as much detail as 1080p Full HD – almost photographic in nature)	10	18	10	11	7	4
Games Consoles (eg X-box, Wii, PS2/3 /4 etc.)	34	75	45	43	11	-
DVD Player or recorder (separate to Virgin box or Sky Plus recording facility)	50	62	50	56	46	33
Desktop computer	20	25	19	26	19	10
Laptop/Mac	67	83	74	78	60	11
iPad or other tablet (including kids tablets such as Kurio, Meep etc.)	52	72	61	60	39	10
eReaders (eg Kindle, iRiver, Sony reader etc.)	14	14	13	19	13	-
Smart phone (e.g. iPhone, Samsung Galaxy etc.) which is a phone with advanced capabilities, such as the ability to download apps, go online etc.	76	92	89	90	60	10
Basic mobile which makes calls as well as sends and receives text messages	28	22	14	27	40	64
A digital device that can stream content from the internet on your TV screen (e.g. Apple TV, Chromecast, etc.)	15	15	19	20	8	2
Apps on a smart TV	16	37	17	23	9	2
A wearable digital device (like an activity wristband, e.g. Fitbit, Smartwatch or smart glasses)	7	9	9	11	3	-

Q. Which of the following devices do you currently use?

*Potential online OTG device definition: Laptop/iPad, eReader, Smartphone, wearable device

80% of us now access the internet once a day or more often

Base: all Adults 16+ - 1,000

% Accessing the internet at least once a day



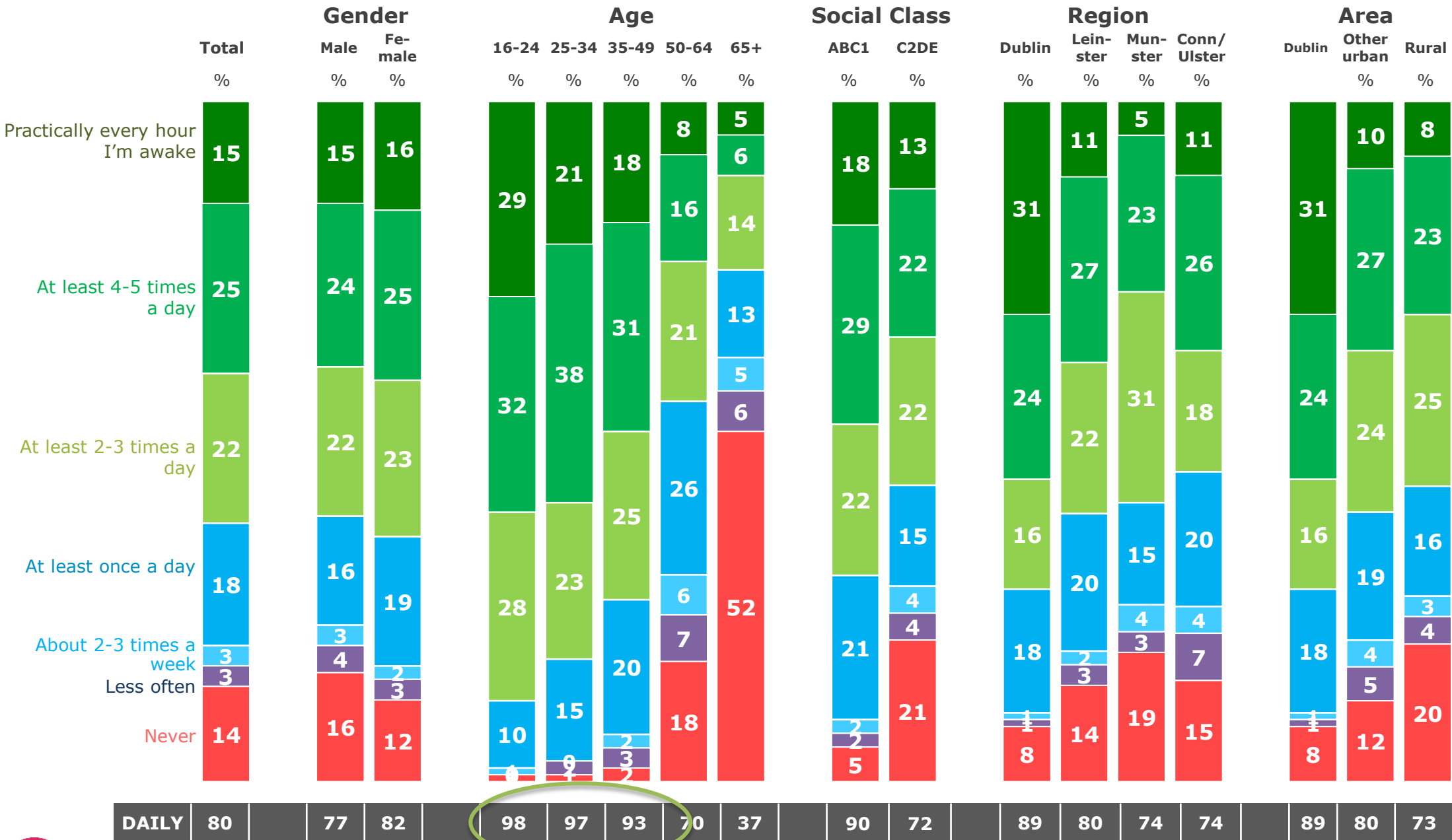
Pre-January 2017 comparable data from eir Connected Living Survey 2015

Note: 14% of the population still never access the internet.

Q. How often do you yourself access the internet nowadays?

Almost all under 35s are now online at least once a day!

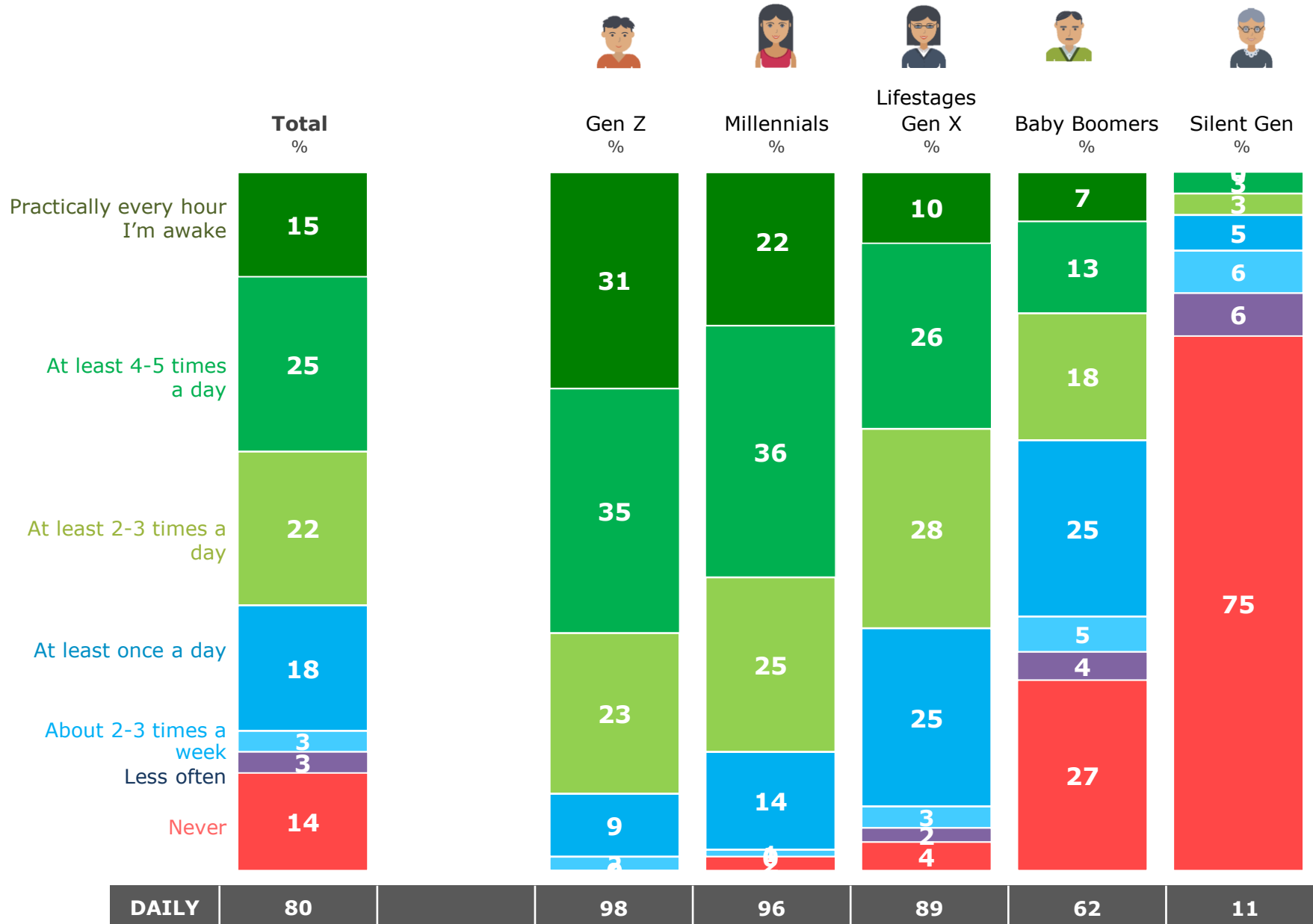
Base: All Adults 16+ - 1,000



Q. How often do you yourself access the internet nowadays?

Almost all under 35s are now online at least once a day!

Base: All Adults 16+ - 1,000



Q. How often do you yourself access the internet nowadays?



Online services usage (anywhere) 2018 x demographics

Base: All adults 16+ - 1,000

■ Significantly higher
■ Significantly lower

	Total	Gender		Age					Social Class		Region				Area		
		Male	Female	16-24	25-34	35-49	50-64	65+	ABC1	C2DE	Dublin	Lein-ster	Mun-ster	Conn/Ulster	Dublin	Other Urban	Rural
Base:	1000	481	519	116	169	291	248	176	443	557	302	249	276	173	302	382	316
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Use personal email	61	60	63	70	72	74	56	29	71	54	61	62	58	66	61	67	57
Online banking	56	54	57	58	74	72	46	20	69	46	58	53	54	57	58	58	51
Watch YouTube	55	55	56	85	77	63	37	19	64	49	62	53	59	40	62	63	43
Use instant messaging (WhatsApp, Facebook Messenger, Snapchat, Hangouts, Viber, Skype etc.)	48	45	51	75	63	60	32	11	53	45	45	57	47	41	45	51	48
Watch Netflix	43	45	42	74	53	51	30	13	51	38	50	43	38	40	50	45	36
Call someone using Whatsapp	37	34	40	50	45	49	29	11	43	33	43	36	36	30	43	39	30
Use catch-up TV services like RTE Player, TV3 Player, 4oD, Virgin and Sky On Demand etc on mobile/laptop/TV or other devices	27	27	28	34	29	37	25	8	33	23	28	30	28	20	28	32	23
Use work emails	27	31	23	27	36	38	21	7	42	16	31	22	28	25	31	31	19
Skype someone	26	28	25	34	35	34	18	10	34	21	28	20	29	29	28	33	19
Stream music (eg via Spotify, Youtube etc.)	24	26	23	59	32	27	9	3	32	19	27	22	25	22	27	27	19
Download, stream or watch movies/programmes online	23	25	20	48	29	27	11	3	28	19	22	23	24	22	22	26	20
None of these	17	21	14	1	2	5	25	57	7	25	12	16	20	23	12	15	24
Watch or stream Live sports or other events online	16	23	8	27	19	21	9	3	22	11	16	14	16	17	16	20	11
Play games online with others (e.g. World of Warcraft, League of Legends etc.)	13	16	10	33	16	14	6	1	16	11	10	11	17	14	10	18	11
Watch/stream movies/shows etc. via sites such as Showbox, VoDLocker, etc.	10	12	9	20	12	13	6	0	14	8	9	11	13	7	9	15	7
Watch Amazon Prime	5	7	4	8	10	6	2	0	6	5	6	4	6	5	6	6	4

Under 50s and middle class (ABC1s) use a wider variety of online services versus the over 50s and blue collar (C2DE).

Q. Which of these do you do nowadays anywhere?



Online services usage (anywhere) 2018 x lifestage

Base: All adults 16+ - 1,000

Significantly higher
Significantly lower

	Total	Lifestages				
		Gen Z	Millennials	Gen X	Baby Boomers	Silent Gen
Base:	1000	73	332	213	279	71
	%	%	%	%	%	%
Use personal email	61	67	74	73	44	18
Online banking	56	48	73	67	37	10
Watch YouTube	55	87	74	56	31	5
Use instant messaging (WhatsApp, Facebook Messenger, Snapchat, Hangouts, Viber, Skype etc.)	48	85	65	51	24	6
Watch Netflix	43	76	58	43	22	3
Call someone using Whatsapp	37	57	43	44	22	3
Use catch-up TV services like RTE Player, TV3 Player, 4oD, Virgin and Sky On Demand etc on mobile/laptop/TV or other devices	27	42	30	38	19	2
Use work emails	27	28	36	32	14	-
Skype someone	26	36	35	27	16	4
Stream music (eg via Spotify, Youtube etc.)	24	64	37	20	6	-
Download, stream or watch movies/programmes online	23	50	32	24	7	2
Watch or stream Live sports or other events online	16	33	20	19	7	2
Play games online with others (e.g. World of Warcraft, League of Legends etc.)	13	47	16	12	3	-
Watch/stream movies/shows etc. via sites such as Showbox, VoDLocker, etc.	10	25	13	13	3	-
Watch Amazon Prime	5	8	9	4	1	-

Higher usage of online services among Generation Z, Millennials and Generation X lifestages.

Q. Which of these do you do nowadays anywhere?

What we are doing online nowadays ...

Base: all Adults 16+ - 1,000



The under 50s, ABC1s and Dubliners are the most active online.

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

Online activity nowadays x demographics

Base: all Adults 16+ - 1,000

Significantly higher
Significantly lower

	Total	Gender		Age					Social Class		Region				Area		
		Male	Female	16-24	25-34	35-49	50-64	65+	ABC1	C2DE	Dublin	Leinster	Munster	Conn/ Ulster	Dublin	Other Urban	Rural
Base:	1000	481	519	116	169	291	248	176	443	557	302	249	276	173	302	382	316
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Purchase goods or services online	57	55	58	76	77	71	39	19	68	48	59	62	51	52	59	61	50
Worry about data privacy online	47	44	50	53	59	55	42	21	53	42	48	48	51	37	48	53	40
Share posts, videos, photos etc. online	47	42	52	75	71	57	26	11	52	43	56	50	41	36	56	48	39
Search for free Wi-Fi when in cafés, bars, or other outlets/places	42	39	45	64	67	48	26	11	48	38	46	44	41	36	46	44	38
Post content online	40	37	42	62	62	47	22	9	45	35	47	39	39	29	47	41	32
Research products on your mobile phone when in a store	38	37	39	62	55	46	23	9	45	33	39	45	34	35	39	43	34
Follow brands on social media (i.e. on Facebook, Twitter, etc)	33	29	37	64	51	35	16	10	37	31	36	33	35	27	36	40	25
Connect your tablet, laptop or mobile phone to your TV to play programmes, videos or music.	33	35	31	55	45	42	18	7	38	29	42	33	29	25	42	34	25
Check social media or emails when having difficulty sleeping	30	29	31	60	48	31	17	5	35	27	35	32	27	25	35	34	23
Check in your location when on social media	26	27	25	52	37	28	14	6	32	21	34	30	20	15	34	28	17
Check work emails when on holidays	24	27	22	34	38	30	17	4	32	19	32	23	20	21	32	27	16
Turned on heating or other household devices remotely via an app	14	14	13	21	17	16	11	5	19	11	20	13	12	8	20	15	8
None of these	23	27	19	5	7	14	32	60	17	28	20	22	26	28	20	21	29

The under 50s, ABC1s and Dubliners are most active online.

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

Online activity nowadays x demographics

Base: all Adults 16+ - 1,000

Significantly higher
Significantly lower

	Total	Working		Lifestages				
		Yes	No	Gen Z	Millennials	Gen X	Baby Boomers	Silent Gen
Base:	1000	531	469	73	332	213	279	71
	%	%	%	%	%	%	%	%
Purchase goods or services online	57	70	42	71	78	62	31	7
Worry about data privacy online	47	52	41	58	58	47	32	20
Share posts, videos, photos etc. online	47	55	38	84	68	45	18	3
Search for free Wi-Fi when in cafés, bars, or other outlets/places	42	48	37	72	60	42	19	6
Post content online	40	48	30	67	59	35	16	3
Research products on your mobile phone when in a store	38	47	29	65	54	38	18	-
Follow brands on social media (i.e. on Facebook, Twitter, etc)	33	37	29	68	49	29	13	3
Connect your tablet, laptop or mobile phone to your TV to play programmes, videos or music.	33	40	25	62	46	32	13	-
Check social media or emails when having difficulty sleeping	30	34	26	56	47	23	13	-
Check in your location when on social media	26	32	19	49	40	20	10	-
Check work emails when on holidays	24	35	13	30	37	22	12	-
Turned on heating or other household devices remotely via an app	14	17	10	19	19	13	9	-
None of these	23	15	32	5	7	18	43	76

Workers, Generation Z and Millennials are most active online.

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



Social media usage nowadays x demographics

Base: All Adults 16+ - 1,000

Significantly higher
Significantly lower

	Total	Gender		Age					Social Class		Region				Area		
		Male	Female	16-24	25-34	35-49	50-64	65+	ABC1	C2DE	Dublin	Lein-ster	Mun-ster	Conn/ Ulster	Dublin	Other Urban	Rural
Base:	1000	481	519	116	169	291	248	176	443	557	302	249	276	173	302	382	316
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
ANY SOCIAL MEDIA	75	71	78	99	95	90	60	29	84	68	81	79	72	62	81	79	66
Facebook	67	63	72	95	92	81	48	23	76	61	73	69	66	57	73	70	61
What's App	55	53	57	70	72	69	45	16	65	48	64	56	50	48	64	58	46
Google + (Not Google Search)	34	35	34	49	45	41	26	11	42	29	31	45	34	24	31	46	26
Instagram	31	30	32	75	53	31	9	2	35	28	38	34	24	26	38	34	23
Snapchat	27	25	30	68	47	27	6	2	29	26	25	27	26	34	25	34	22
Viber/ Viber Messenger	24	22	26	35	36	29	15	6	27	22	19	25	30	22	19	31	22
Spotify	22	23	20	46	35	24	6	5	24	20	28	24	16	15	28	20	18
Twitter	19	21	17	39	26	22	9	1	26	13	21	14	23	14	21	22	13
Google Drive	19	18	19	32	20	24	12	6	27	13	21	23	12	18	21	24	12
LinkedIn	15	18	12	20	24	21	7	3	22	10	22	12	13	11	22	15	9
Pinterest	12	9	16	23	18	15	6	2	14	11	12	12	15	11	12	13	12
Drop Box (file transfer)	11	12	11	20	13	16	5	4	17	8	13	13	10	8	13	13	9
One Drive (Microsoft)	7	9	6	18	9	9	3	1	12	4	11	7	7	3	11	8	4
Sound Cloud	6	7	5	13	11	5	3	1	8	5	6	7	5	7	6	7	5
Tinder	5	6	4	17	10	3	1	1	6	5	7	5	3	7	7	7	3
Tumblr	3	3	3	7	5	2	0	1	4	2	2	2	4	3	2	4	2
WeTransfer (file transfer)	2	2	2	5	2	1	1	1	3	1	2	1	2	2	2	2	1

9 in 10 under 50s are on some form of social media site.

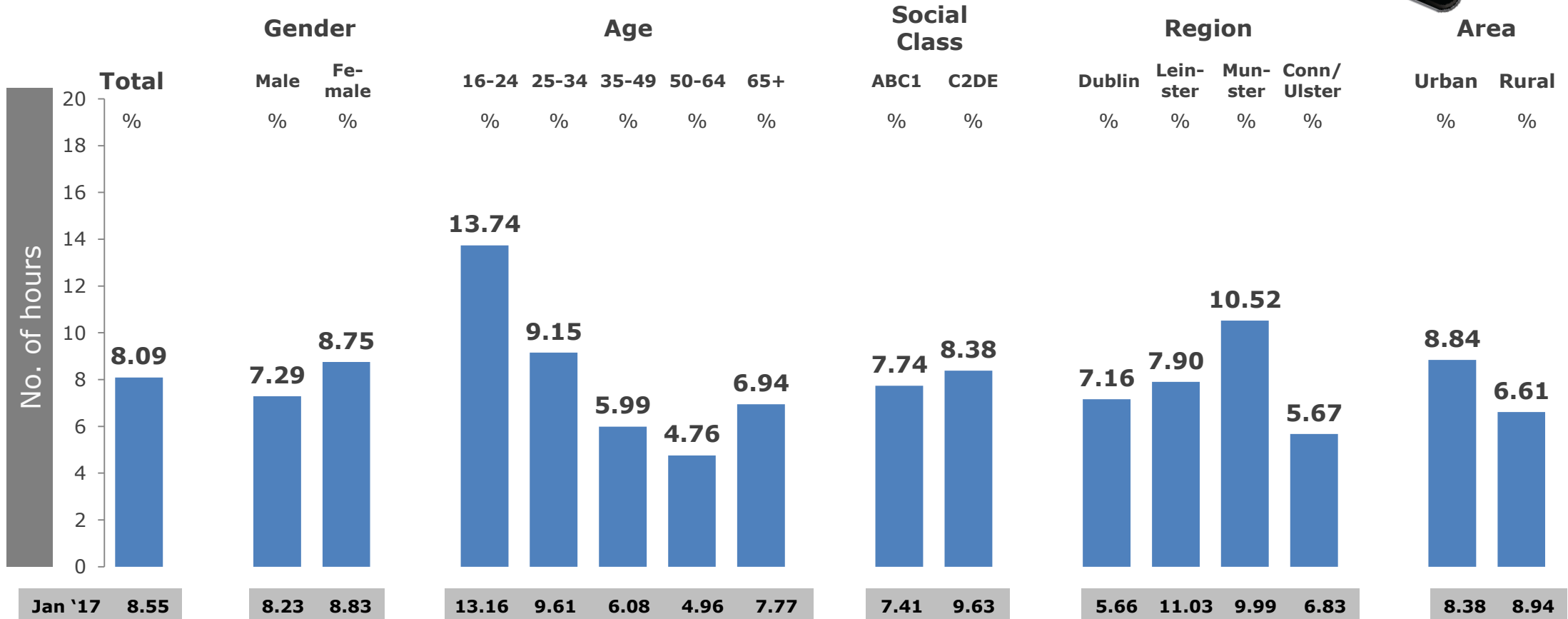


We're spending an average of 8 hours per week on Facebook

Base: All Facebook users - 663



Mean hours per week



There might be more of us on Facebook, but the number of hours we are spending on it is in decline.

Q. And how many hours per week (including weekends) would you spend on Facebook, whether at home or not?

Under 24s and over 50s are polar opposite when it comes to social media

Base: All use social media sites - 734



■ Significantly higher
■ Significantly lower

	Total	Gender		Age					Social Class		Region				Area		
		Male	Female	16-24	25-34	35-49	50-64	65+	ABC1	C2DE	Dublin	Leinster	Munster	Conn/Ulster	Dublin	Other Urban	Rural
Base:	734	331	403	115	161	258	150	50	365	369	235	196	195	108	235	293	206
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
I'm getting tired of Facebook and other social media	42	42	42	33	42	48	43	38	45	39	42	42	36	56	42	41	44
The last thing I do at night is check emails, text messages or social media sites	42	38	45	58	53	37	24	29	40	43	41	41	42	43	41	41	43
The first thing I do in the morning is check emails, text messages, or social media sites	37	37	37	49	48	36	18	23	37	38	34	42	34	40	34	38	39
I can't imagine my life without social media	33	31	35	50	40	29	17	24	30	36	25	37	37	37	25	39	35
I'd hate to be the type of person who only has a few friends on Facebook	23	21	26	31	28	20	18	19	22	24	24	15	31	26	24	25	21

Q. Here are some other things people have said about social media. Do you agree with these statements?

Under 24s and over 50s are polar opposite when it comes to social media

Base: All use social media sites - 734



■ Significantly higher
■ Significantly lower

	Total	Lifestages				
		Gen Z	Millennials	Gen X	Baby Boomers	Silent Gen
Base:	734	115	161	258	150	50
	%	%	%	%	%	%
I'm getting tired of Facebook and other social media	42	26	43	45	46	12
The last thing I do at night is check emails, text messages or social media sites	42	61	49	32	27	33
The first thing I do in the morning is check emails, text messages, or social media sites	37	54	43	33	18	15
I can't imagine my life without social media	33	56	39	26	14	48
I'd hate to be the type of person who only has a few friends on Facebook	23	37	27	15	17	18

Q. Here are some other things people have said about social media. Do you agree with these statements?



Location of watching online videos x demographics

Base: all Adults who watched online videos in past 7 days - 625

Significantly higher
Significantly lower

	Total	Gender		Age					Social Class		Region				Area		
		Male	Female	16-24	25-34	35-49	50-64	65+	ABC1	C2DE	Dublin	Leinster	Munster	Conn/Ulster	Dublin	Other Urban	Rural
Base:	625	299	326	99	141	221	115	49	305	320	204	168	160	93	204	261	160
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
At home	96	96	95	96	95	97	94	91	96	95	95	95	98	93	95	97	93
Any out of home (excl. some one else's home)	31	37	25	43	35	27	26	11	37	25	35	24	28	41	35	31	26
In someone else's home (e.g. friend)	19	23	16	40	22	13	8	5	22	17	24	19	17	14	24	21	12
At work / place of education	17	21	13	28	20	12	15	6	23	12	22	14	14	19	22	17	12
Commuting / on transportation	13	16	10	26	14	9	8	7	19	8	21	4	13	13	21	11	8
In a bar / pub / restaurant / cinema	12	15	9	18	15	10	9	2	17	8	14	6	14	15	14	11	10
In a store	6	7	5	13	8	5	3	2	9	4	10	3	8	3	10	7	1
In playground / park / other public space	6	5	7	9	9	4	2	2	7	5	6	4	7	7	6	6	5
Somewhere else	4	4	4	10	4	2	4	-	5	3	7	3	2	4	7	4	2
Don't remember	2	2	3	2	2	3	2	2	2	2	3	2	1	2	3	1	3

Under 25s most likely to be watching online video content across a number of locations: in someone else's home, at work/place of education, when commuting.