



SIGN OF THE TIMES (Tech Scape) 2017

PREPARED BY:
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Behaviour & Attitudes
January 2017

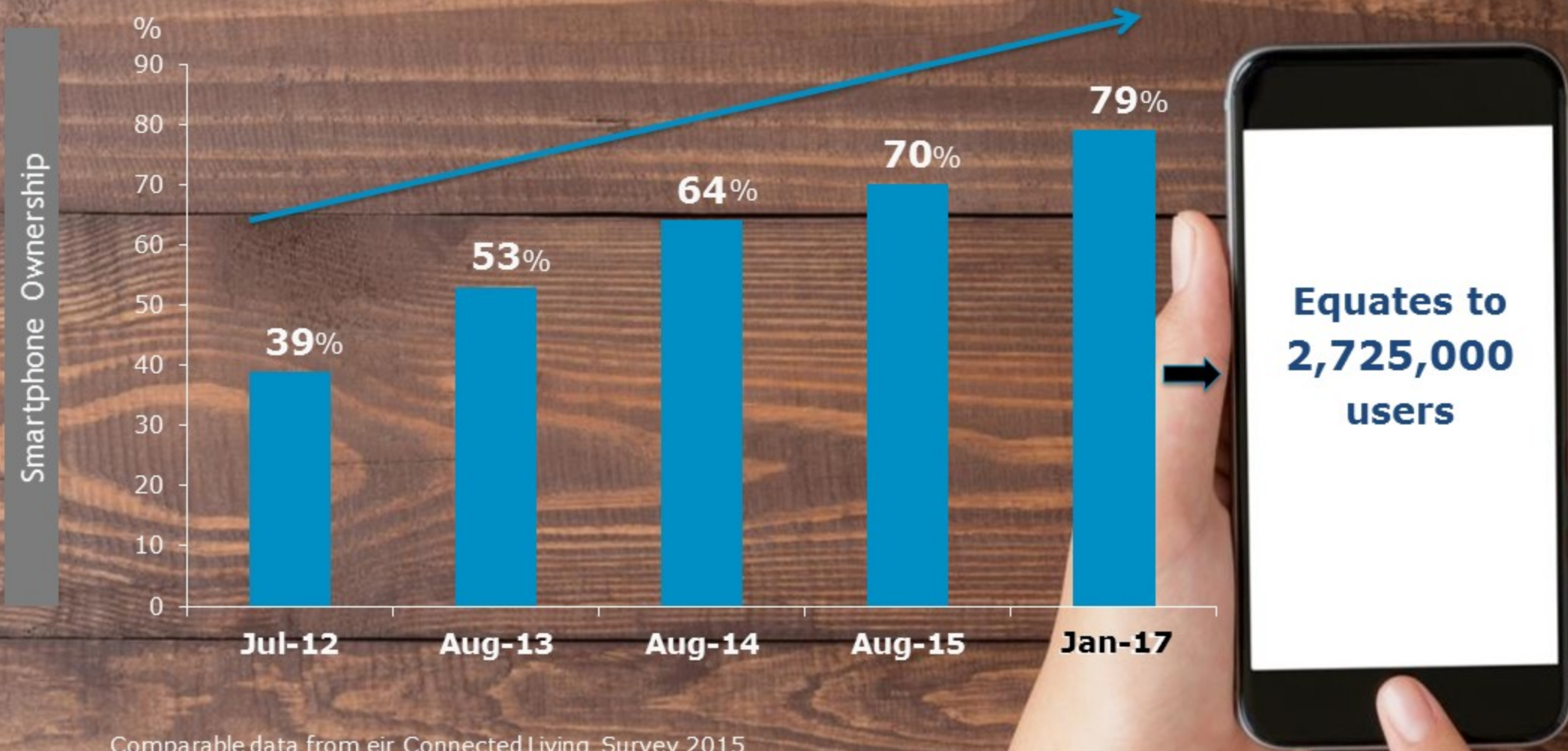
www.banda.ie

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Claimed smartphone ownership continues to grow

Base: All with mobile - 968



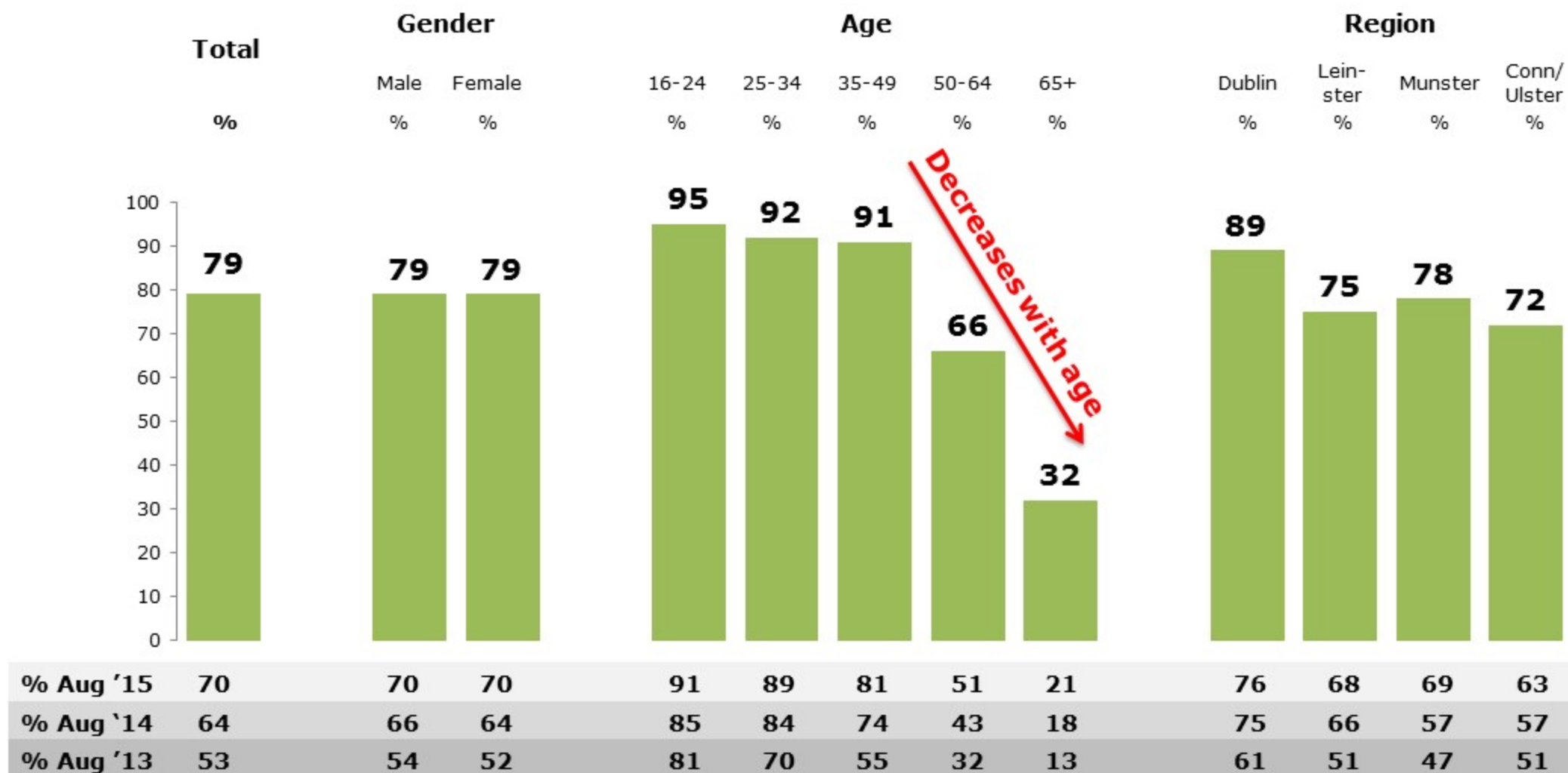
Comparable data from eir Connected Living Survey 2015

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 claims to own a smartphone?

Base: All with mobile - 968



Comparable data from eir Connected Living Survey 2015

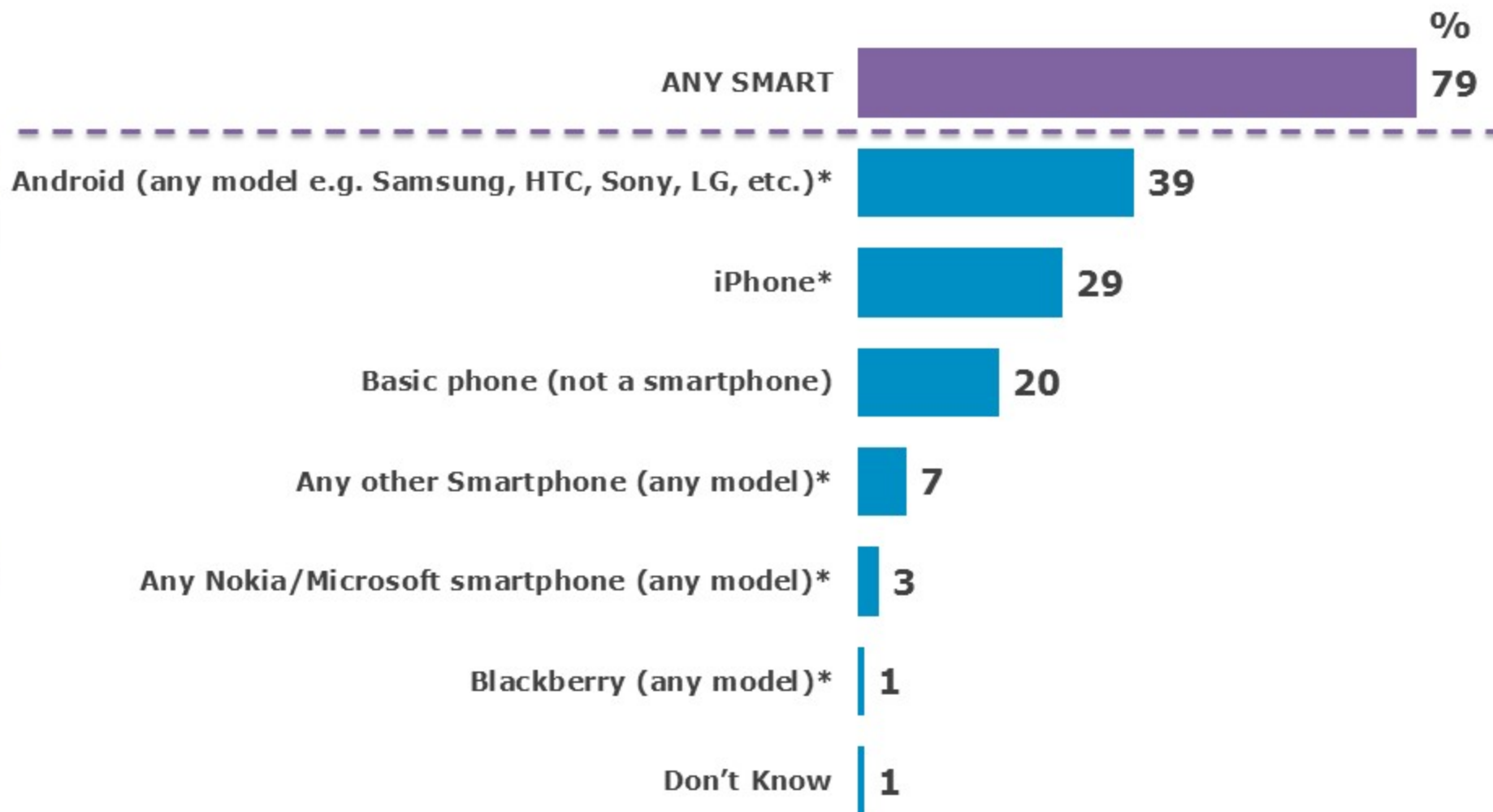
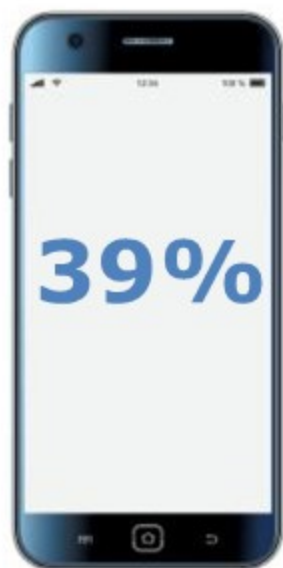
Noticeable growth in smartphone ownership across the board.

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.

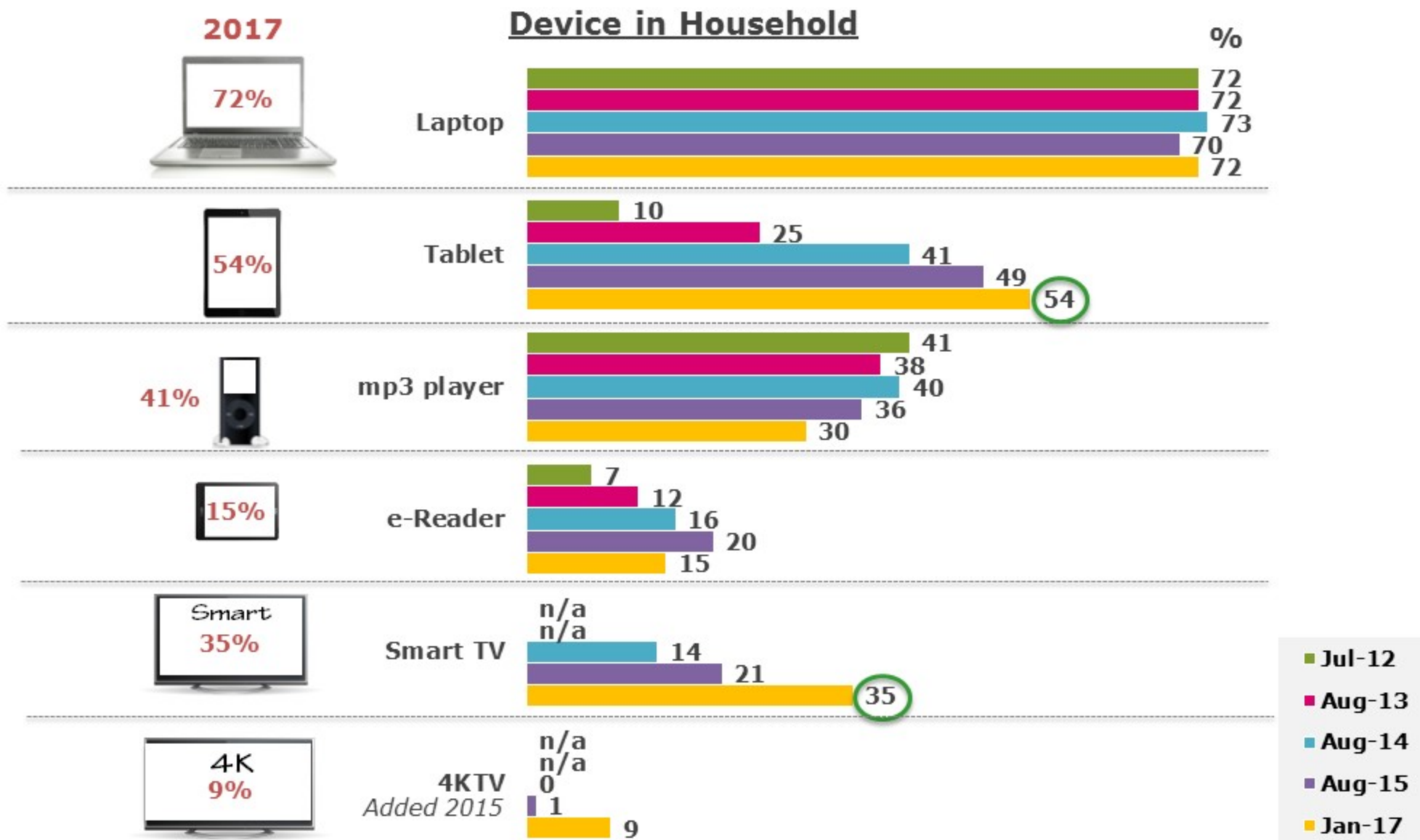
Android is outperforming iPhone in the smartphone battle

Base: All with mobile - 968



Tablet & Smart TV growth continues to increase

Base: All adults aged 16+ - 1,000



Comparable data from eir Connected Living Survey 2015

MP3 players and eReaders on the decline

Devices in the household x demographics

Significantly higher
Significantly lower

Base: All adults 16+ - 1,000

	Total	Age					Social Class		Region				Area	
		16-24	25-34	35-49	50-64	65+	ABC1	C2DEF	Dublin	Leinster	Munster	Conn/Ulster	Urban	Rural
Base:	1000 %	114 %	182 %	336 %	228 %	140 %	483 %	517 %	264 %	240 %	344 %	152 %	621 %	379 %
ANY POTENTIAL OTG ONLINE DEVICE	87	99	96	96	84	47	96	80	97	83	84	81	91	80
Laptop/Mac	72	83	77	81	71	39	85	63	83	70	69	63	78	64
DVD Player or recorder (separate to Virgin box or Sky Plus recording facility)	58	61	58	62	57	52	57	59	41	70	61	66	55	64
iPad or other tablet (including kids tablets such as Kurio, Meep etc.)	54	67	59	67	42	22	66	45	65	46	54	48	59	46
Games Consoles (eg X-box, Wii, PS2/3 /4 etc.)	39	64	47	52	18	5	44	35	37	46	38	35	41	36
Smart TV set (one that connects directly to broadband and has apps built in)	35	30	40	45	34	17	46	28	55	32	23	28	45	21
iPod/portable MP3 Player	30	50	36	37	19	5	39	25	32	33	30	24	32	27
Desktop computer	23	22	23	23	28	19	26	21	28	22	19	23	23	23
Media streaming device (e.g. Apple TV, Chromecast, etc.)	17	22	23	25	7	3	26	11	28	14	11	15	20	14
eReaders (eg Kindle, iRiver, Sony reader etc.)	15	15	14	18	17	8	21	11	22	9	12	17	17	12
Ultra 4K TV set (a TV set that delivers 4 times as much detail as 1080p Full HD – almost photographic in nature)	9	10	11	15	5	1	16	5	20	6	3	8	12	5

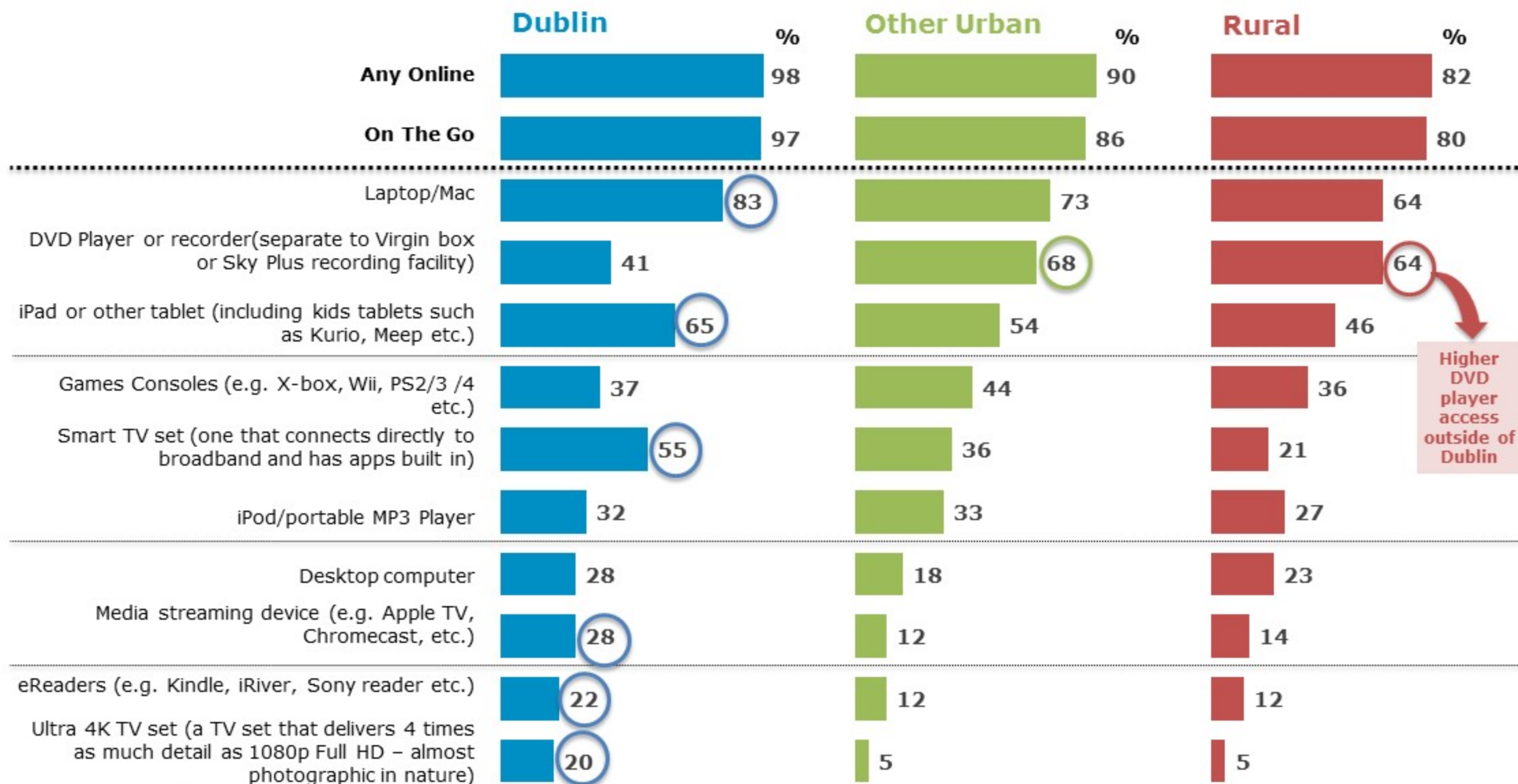
Q.3

Which of the following devices are in your household?

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

3 Speed Ireland regarding device access still exists

Base: All adults 16+ - 1,000



Dublin continue to outperform on device access, especially newer devices such as 4K TV sets.

Q.3

Which of the following do you have in your household?

*Portable online device definition: Laptop/iPad, eReader, iPod, Smartphone

The tablet situation

**Tablet access
continues to
grow.**



*Comparable data from eir Connected Living Survey 2015

Desire for new devices also strong



**35% now have access to a smart TV
(1,258,000 households)**



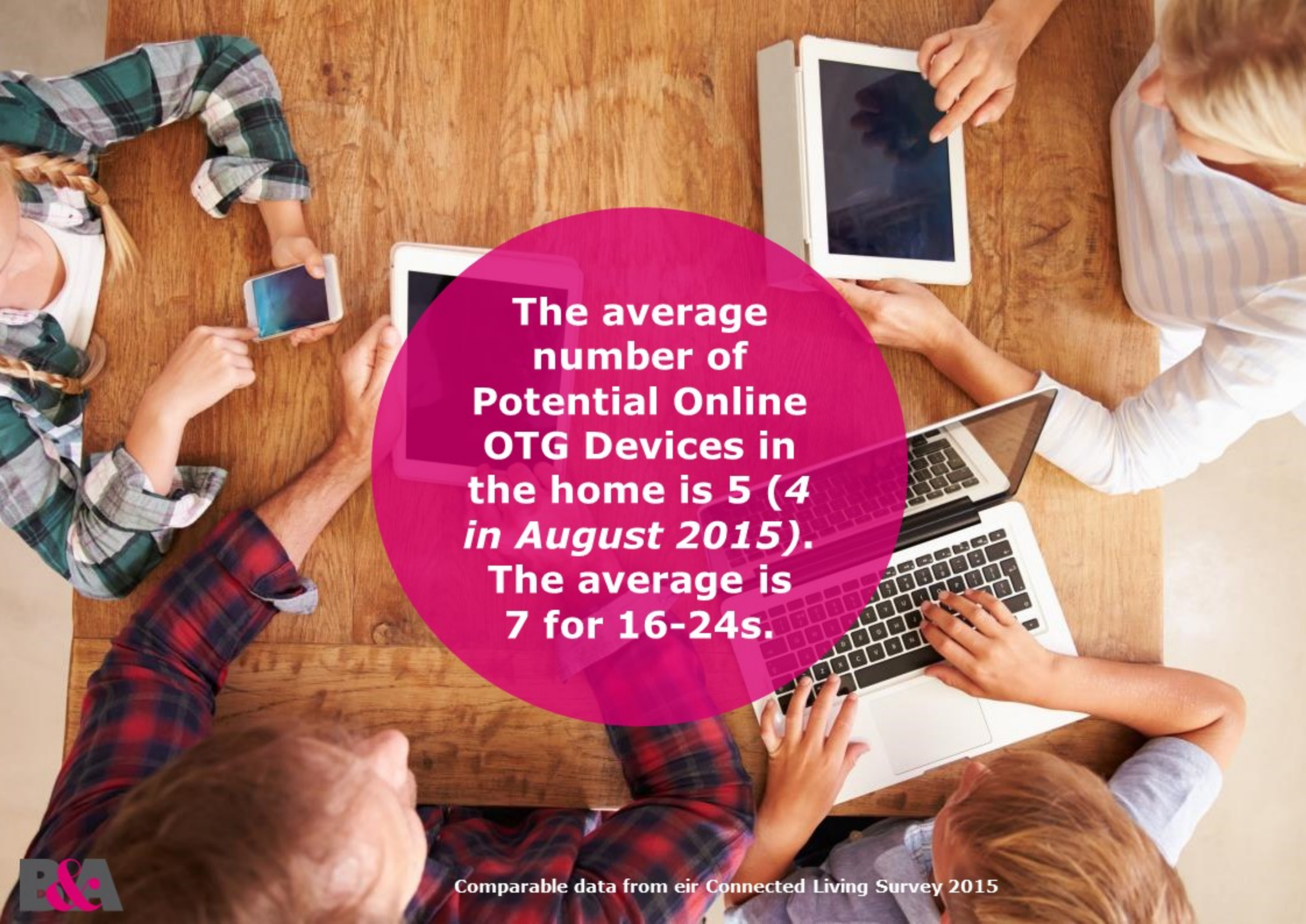
21% in August '15



**17% of adults now have access to a
media streaming device (e.g. Apple TV,
Chromecast, etc.) – 619,000
households**

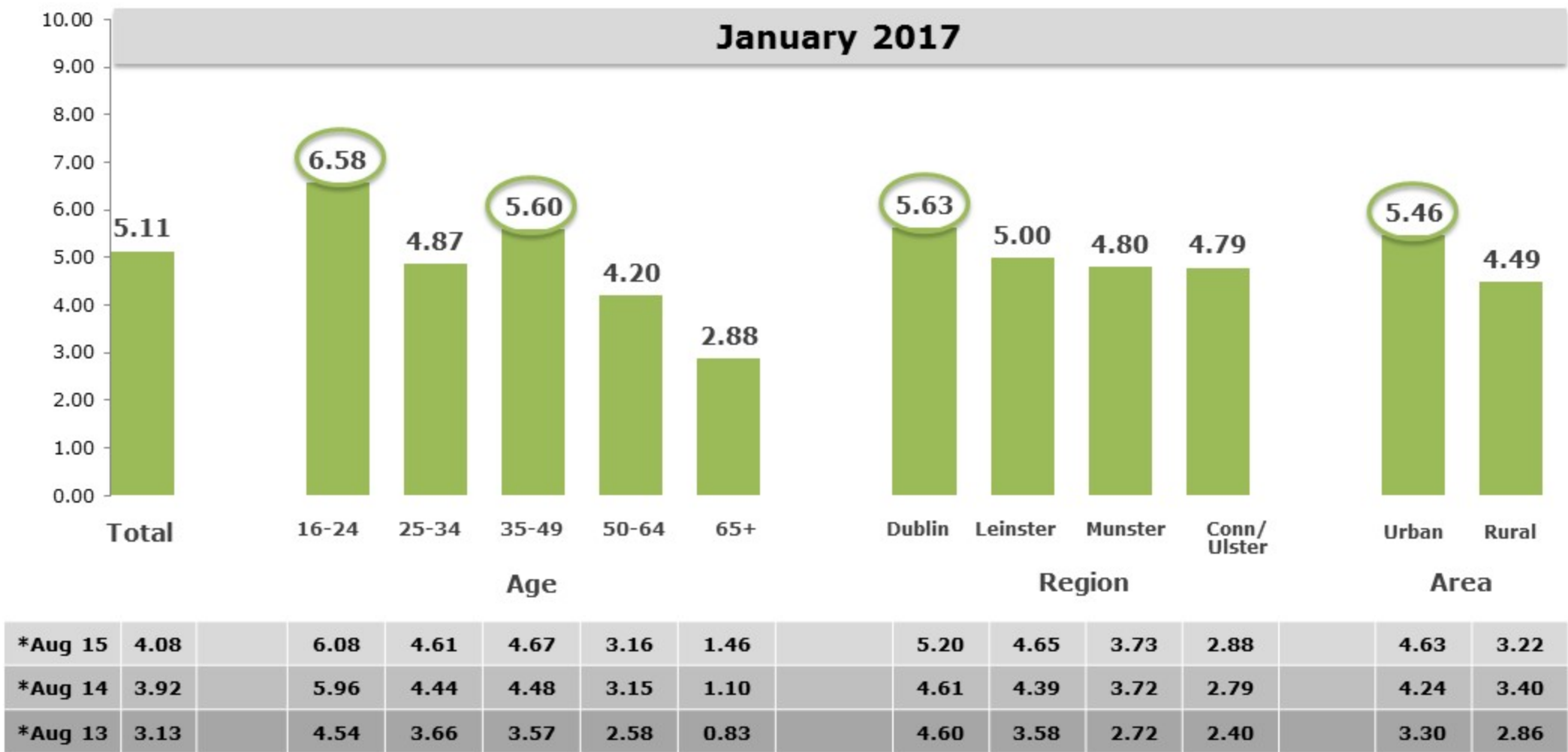


11% in August '15



**The average
number of
Potential Online
OTG Devices in
the home is 5 (4
in August 2015).
The average is
7 for 16-24s.**

On average adults have access to 5 Potential Online On-the-Go Devices* at home



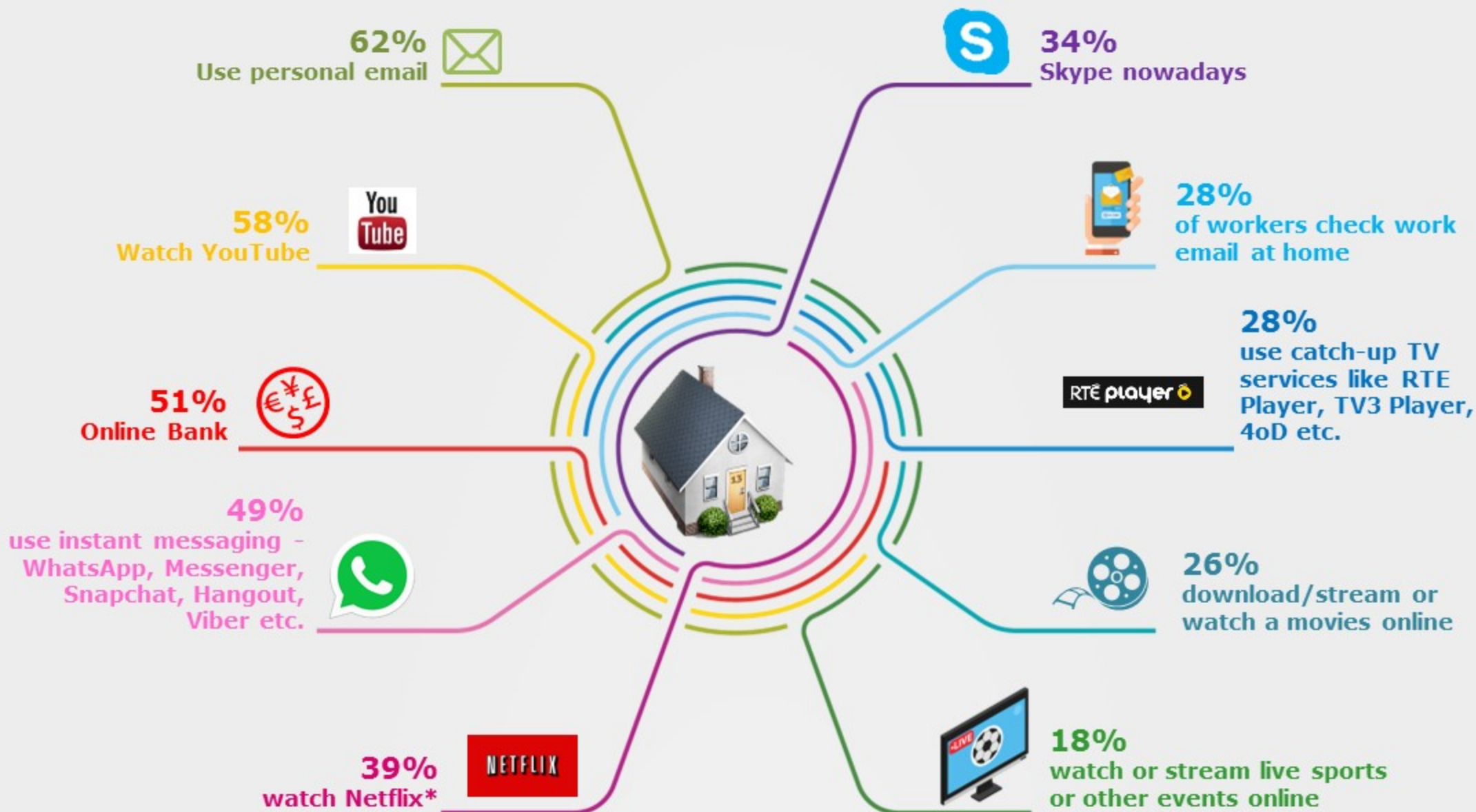
*Comparable data from eir Connected Living Survey 2015

Highest access to potential online on-the-go devices at home among 16-24s, urbanites (and particularly Dubliners).

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

Dynamic online behaviour at home 2017

As many now watch Netflix as use Skype



Q.5a

Which of these do you do nowadays at home?

39% of the population now watch Netflix (51% in Dublin).

Online behaviour at home vs anywhere

Base: All adults 16+ - 1,000



Anywhere

%



At home

%

Use personal eMail	64	62
Watch YouTube	59	58
Online banking	54	51
Use instant messaging (WhatsApp, Messenger, Snapchat, Hangouts, Viber, Skype etc.)	51	49
Watch Netflix	39	38
Skype someone	36	34
Check work emails	31	28
Download, stream or watch a movies online	29	26
Use catch-up TV services like RTE Player, TV3 Player, 4oD, Sky on Demand etc.	29	28
Stream music (e.g. via Spotify, Pandora etc.)	22	21
Watch, or stream Live sports or other events online	20	18
Watch/stream movies/shows etc. via sites such as Showbox, VoDLocker, etc.	18	17
Play MMOs (Massive Multi-player online) games (e.g. World of Warcraft, League of Legends etc.)	8	7

Dublin continues to outperform on device access.

Q.5
Q.5a

Which of these do you do nowadays anywhere?
Which of these do you do nowadays at home?

*Portable online device definition: Laptop/iPad, eReader, iPod, Smartphone

Online behaviour anywhere 2017 x demographics

Base: All adults 16+ - 1,000

	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	488	512	114	182	336	228	140	483	517	264	240	344	152	264	357	379
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Use personal eMail	64	65	63	72	79	73	58	26	80	53	76	57	61	59	76	67	53
Watch YouTube	59	64	55	89	80	67	39	12	69	52	68	57	60	49	68	61	52
Online banking	54	56	52	51	72	65	47	20	70	43	63	47	50	56	63	52	50
Use instant messaging (WhatsApp, Messenger, Snapchat, Hangouts, Viber, Skype etc.)	51	50	52	76	64	59	35	13	66	40	63	47	46	45	63	53	41
Watch Netflix	39	40	37	72	50	38	25	8	52	30	51	35	35	31	51	37	31
Skype someone	36	35	36	50	49	36	29	13	47	28	39	35	32	38	39	44	26
Check work emails	31	32	31	24	43	44	25	5	48	20	42	24	24	34	42	29	25
Download, stream or watch a movies online	29	32	25	50	38	31	16	5	40	21	35	27	25	26	35	34	20
Use catch-up TV services like RTE Player, TV3 Player, 4oD, Virgin and Sky On Demand etc on mobile/laptop/TV or other devices	29	28	30	39	38	34	20	9	35	24	35	28	27	25	35	31	23
Stream music (e.g. via Spotify, Pandora etc.)	22	23	21	44	31	25	8	1	30	17	30	24	18	14	30	24	15
Watch, or stream Live sports or other events online	20	28	12	30	30	21	13	2	30	13	28	21	14	13	28	20	13
Watch/stream movies/shows etc. via sites such as Showbox, VoDLocker, etc.	18	20	16	41	25	18	7	2	24	14	26	18	12	14	26	20	11
Play MMOs (Massive Multi-player online) games (e.g. World of Warcraft, League of Legends etc.)	8	9	6	18	10	8	1	1	10	6	8	13	4	5	8	11	5

Q.5

Which of these do you do nowadays anywhere?

Dynamic Online Behaviour At Home 2017 x Demographics

Base: All adults 16+ - 1,000

	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	488	512	114	182	336	228	140	483	462	264	240	344	152	264	357	379
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Use personal eMail	62	64	61	72	76	71	55	26	77	52	71	57	61	57	71	66	52
Watch YouTube	58	63	55	88	79	66	38	12	68	52	67	56	58	48	67	60	51
Online banking	51	52	50	49	66	61	43	20	65	41	54	47	49	54	54	50	49
Use instant messaging (WhatsApp, Messenger, Snapchat, Hangouts, Viber, Skype etc.)	49	49	49	75	62	56	33	11	63	39	59	46	45	44	59	52	40
Watch Netflix	38	40	36	72	49	38	23	8	50	29	50	35	34	30	50	36	31
Skype someone	34	33	35	48	45	35	27	13	44	27	35	34	31	36	35	43	26
Use catch-up TV services like RTE Player, TV3 Player, 4oD, Virgin and Sky On Demand etc on mobile/laptop/TV or other devices	28	27	29	39	37	31	18	9	34	23	32	27	26	24	32	30	22
Check work emails	28	29	27	21	38	40	23	5	44	18	39	22	21	32	39	26	23
Download, stream or watch a movies online	26	29	24	50	35	27	14	5	37	19	30	25	25	26	30	33	18
Stream music (e.g. via Spotify, Pandora etc.)	21	22	20	41	30	23	7	1	28	16	25	24	18	14	25	23	15
Watch, or stream Live sports or other events online	18	26	10	29	27	18	11	2	27	12	23	21	13	13	23	20	13
Watch/stream movies/shows etc. via sites such as Showbox, VoDLocker, etc.	17	18	15	40	24	14	6	2	22	13	21	18	12	14	21	20	11
Play MMOs (Massive Multi-player online) games (e.g. World of Warcraft, League of Legends etc.)	7	9	5	18	10	8	1	1	9	6	7	13	4	4	7	11	4

79% of the
population now
access the internet
once a day or more
often
(up from 75% in
Aug 15)

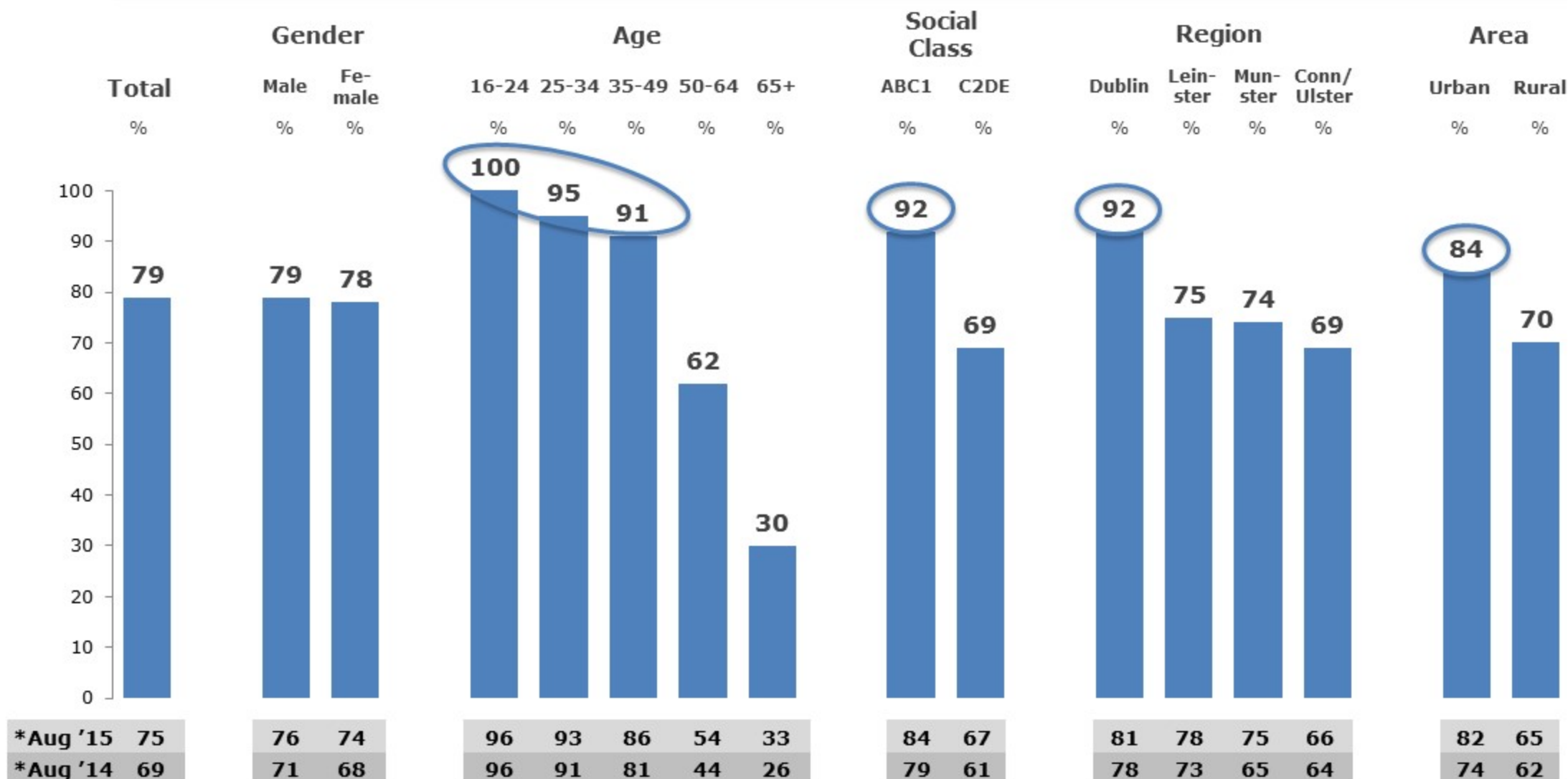
*Comparable data from eir Connected
Living Survey 2015



Frequency of accessing the internet decreases with age

Base: all Adults 16+ - 1,000

% Accessing the internet at least once a day



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

All 16-24 year olds are now online at least once a day!

Base: All Adults 16+ - 1,000

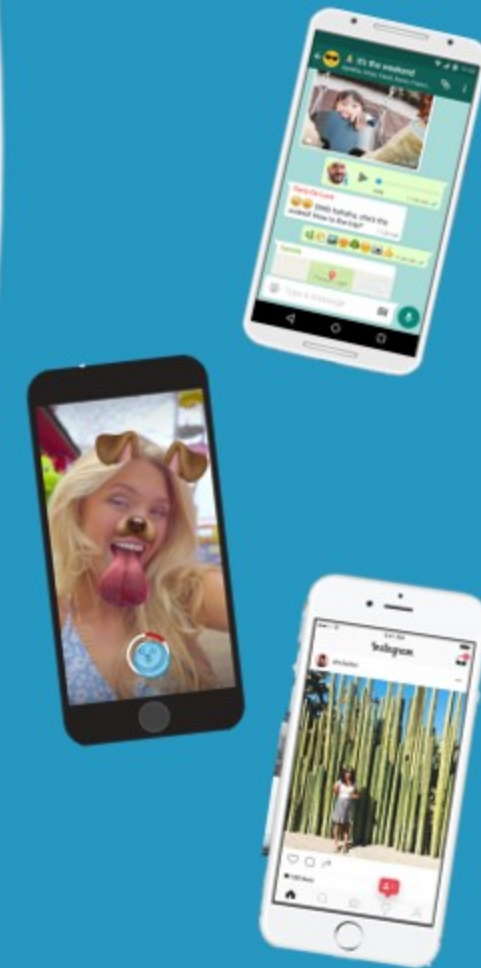
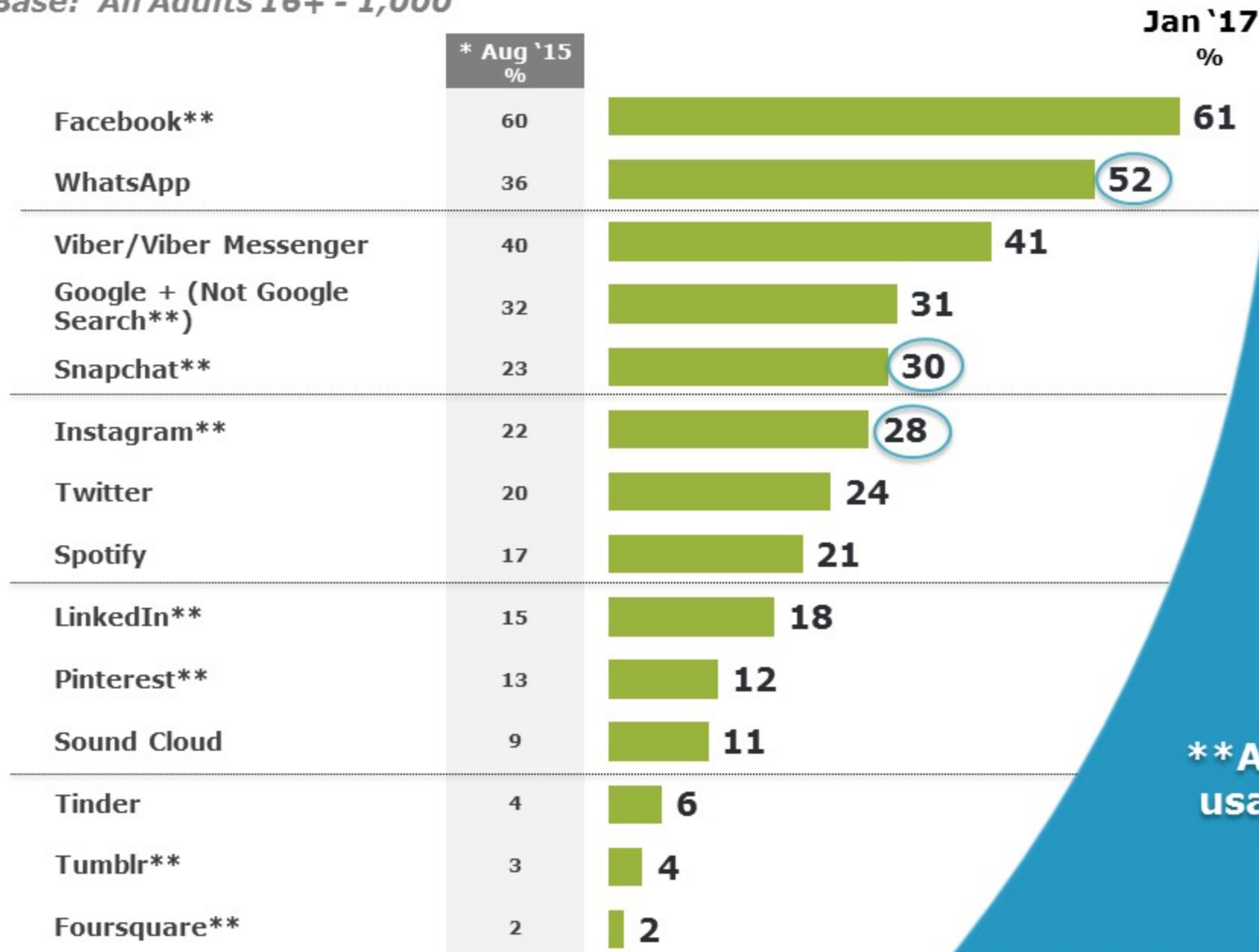


Q.6

How often do you yourself access the internet nowadays?

WhatsApp, Snapchat and Instagram experience biggest growth vs. 2015

Base: All Adults 16+ - 1,000



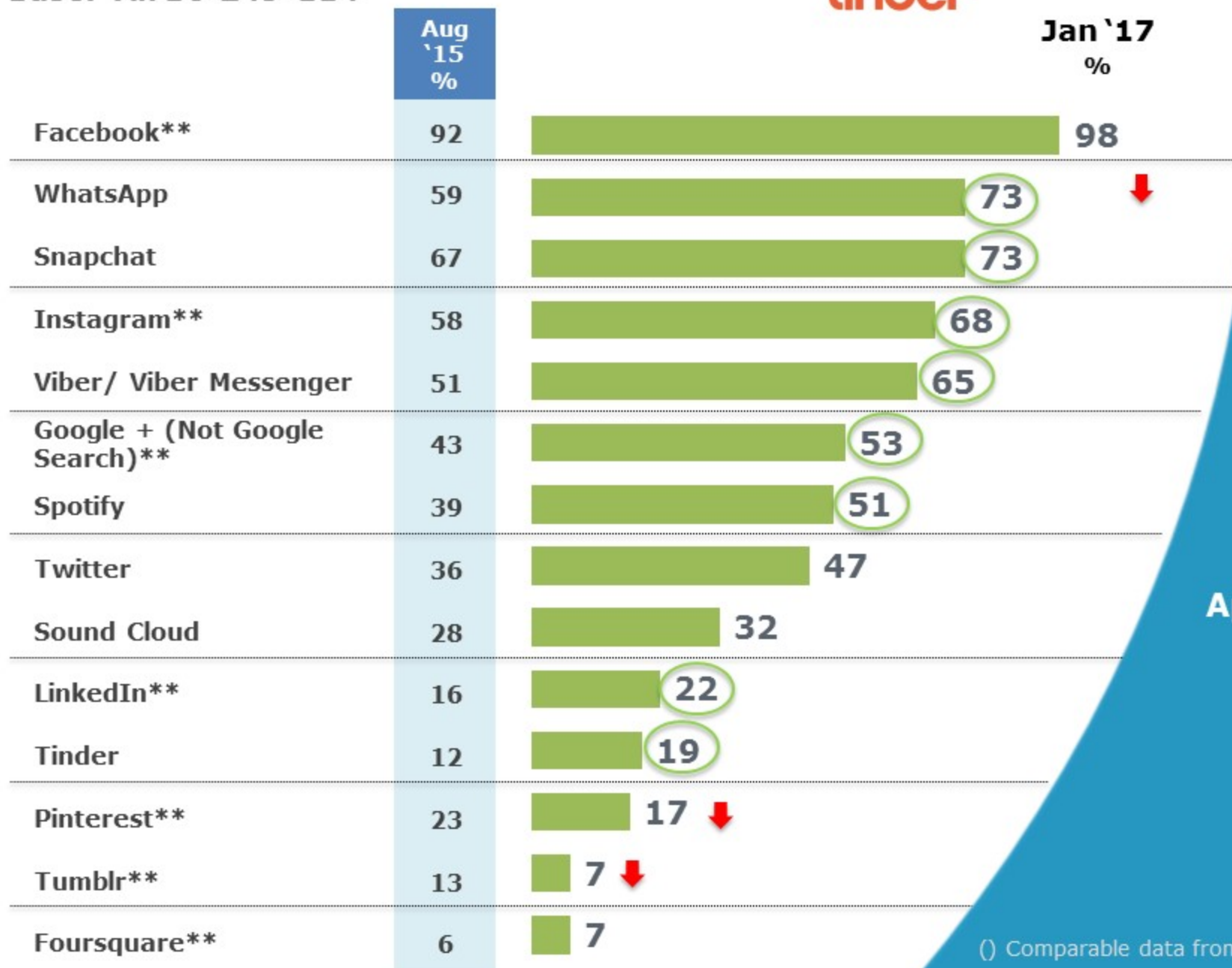
****Any Social Media usage nowadays = 70%**

* Comparable data from eir Connected Living Survey 2015

Top social media/OTT services for 16-24s:

Tinder now used by 19% of 16-24s

Base: All 16-24s -114



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

() Comparable data from eir Connected Living Survey 2015
** Social Media



**Tinder now
used by
19%
of 16-24s**


tinder

Social media usage nowadays x demographics

Base: All Adults 16+ - 1,000

	Total	Gender		Age					Age 2		Social Class	
		Male	Female	16-24	25-34	35-49	50-64	65+	16-34	35+	ABC1	C2DEF
UNWTD	1,000	488	512	114	182	336	228	140	632	368	483	516
	%	%	%	%	%	%	%	%	%	%		
Any Social Media Usage	70	67	74	98	90	81	51	19	87	37	84	61
Facebook	61	57	65	89	81	69	39	16	77	29	74	52
What's App	52	49	54	73	69	60	35	13	66	25	66	42
Viber/ Viber Messenger	41	38	45	65	58	45	24	9	53	18	48	37
Google + (Not Google Search)	31	28	33	53	40	33	19	4	40	13	40	24
Snapchat	30	29	30	73	53	21	7	1	43	4	34	26
Instagram	28	27	30	68	45	24	8	1	40	5	38	22
Twitter	24	26	22	47	32	26	11	3	33	7	32	18
Spotify	21	23	19	51	26	22	6	1	29	4	31	13
LinkedIn	18	20	16	22	20	24	12	3	23	8	30	9
Pinterest	12	9	14	17	20	12	5	3	15	4	17	8
Sound Cloud	11	12	10	32	16	9	3	-	16	1	15	9
Tinder	6	6	6	19	9	3	1	-	8	0	7	5
Tumblr	4	4	3	7	7	3	-	1	5	0	4	3
Foursquare	2	3	2	7	3	2	-	1	3	0	4	1
None of these	25	27	23	0	8	12	43	77	8	58	12	34

Social media usage nowadays x demographics

Base: All Adults 16+ - 1,000

	Total	Region				Area		Smartphone Ownership	
		Dublin	Lein-ster	Mun-ster	Conn/ Ulster	Urban	Rural	Any Smart- phone	Non Smart- phone
UNWTD	1,000	264	240	344	152	621	379	773	195
	%	%	%	%	%	%	%	%	%
Any Social Media Usage	70	79	70	67	62	76	62	84	25
Facebook	61	67	63	58	52	67	51	73	21
What's App	52	66	43	49	45	58	42	66	6
Viber/ Viber Messenger	41	45	42	38	38	45	35	52	5
Google + (Not Google Search)	31	37	33	26	25	35	25	38	6
Snapchat	30	28	35	28	27	31	27	37	4
Instagram	28	36	31	21	25	33	21	36	3
Twitter	24	27	25	20	25	26	20	30	3
Spotify	21	25	21	17	17	23	16	26	3
LinkedIn	18	32	16	9	11	21	12	22	2
Pinterest	12	10	11	13	12	12	11	15	1
Sound Cloud	11	8	17	7	14	11	12	15	-
Tinder	6	7	7	4	4	6	6	8	-
Tumblr	4	4	2	4	3	4	3	5	-
Foursquare	2	3	3	1	2	2	3	3	-
None of these	25	15	28	28	32	20	34	10	73

**We are
spending a
full working
day on
Facebook
nowadays.**

**Facebook
users claim to spend
8-9 hours per week
on Facebook**

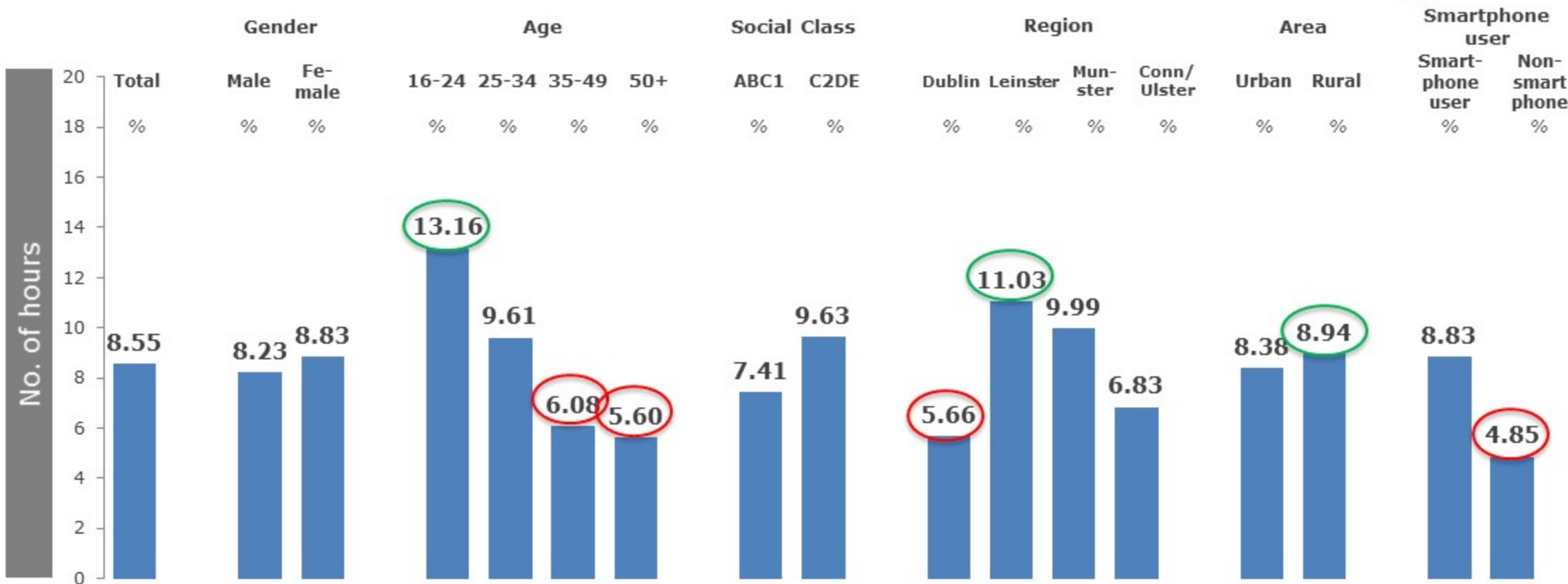


Facebook activity x demographics

Base: All Facebook users - 608



Mean hours per week



16-24s spend an average of 13 hours per week on Facebook. The over 35s, Dubliners and non-smartphone users are the least active Facebook users.

2 in 5 adult fatigue with Facebook is emerging

Base: All use social media sites - 667

Yes
%

I'm getting tired of Facebook

43

Who?

50-64s

I'd hate to be the type of person who only has a few friends on Facebook

23

U25s
Singles

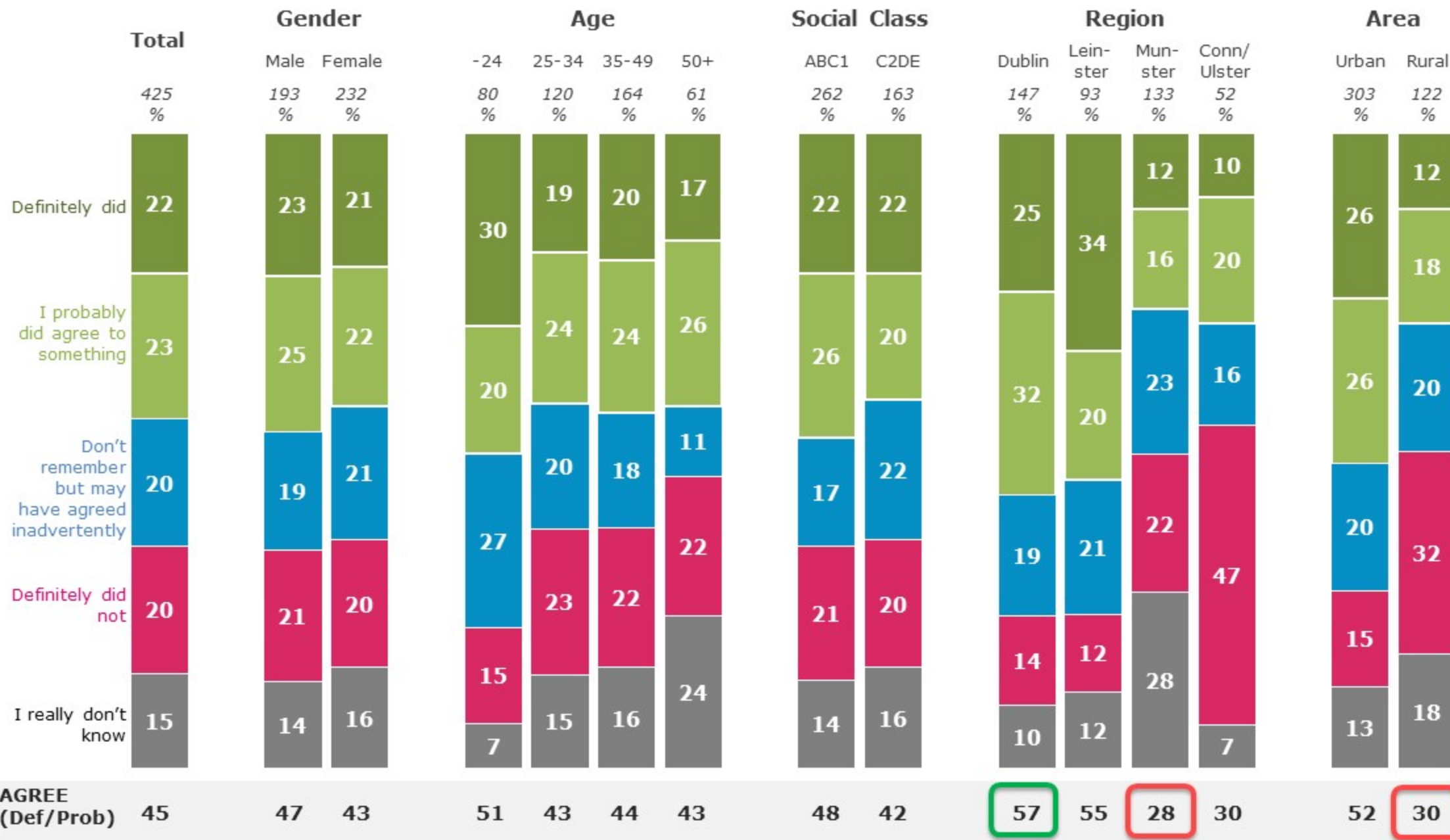
Only 1 in 5 of Facebook & WhatsApp users definitely agreed to Facebook using their data from WhatsApp

Base: All Facebook & WhatsApp users - 425



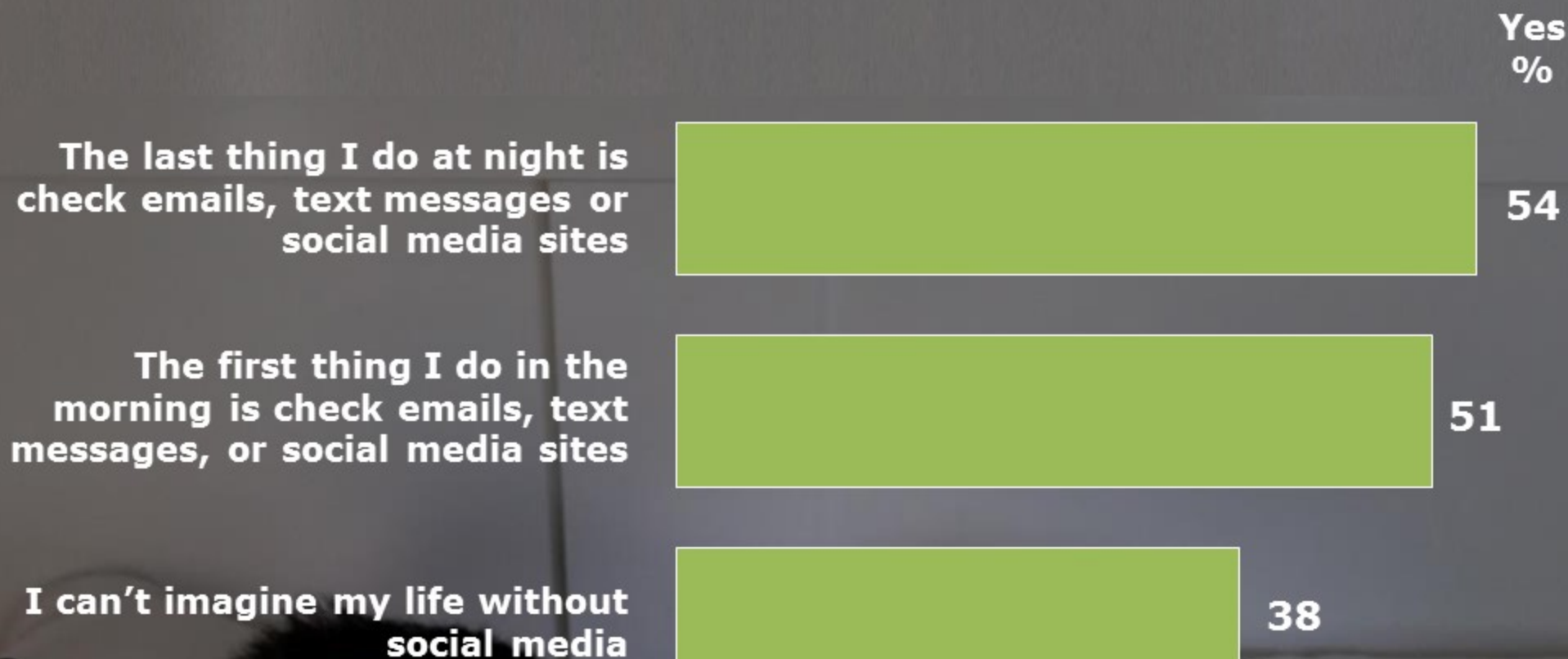
Only 1 in 5 of Facebook & WhatsApp users definitely agreed to Facebook using their data from WhatsApp

Base: All Facebook WhatsApp users - 425



Over half of us check our online accounts last thing at night and first thing in the morning

Base: All use social media sites - 667



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

Base: All use social media sites - 667

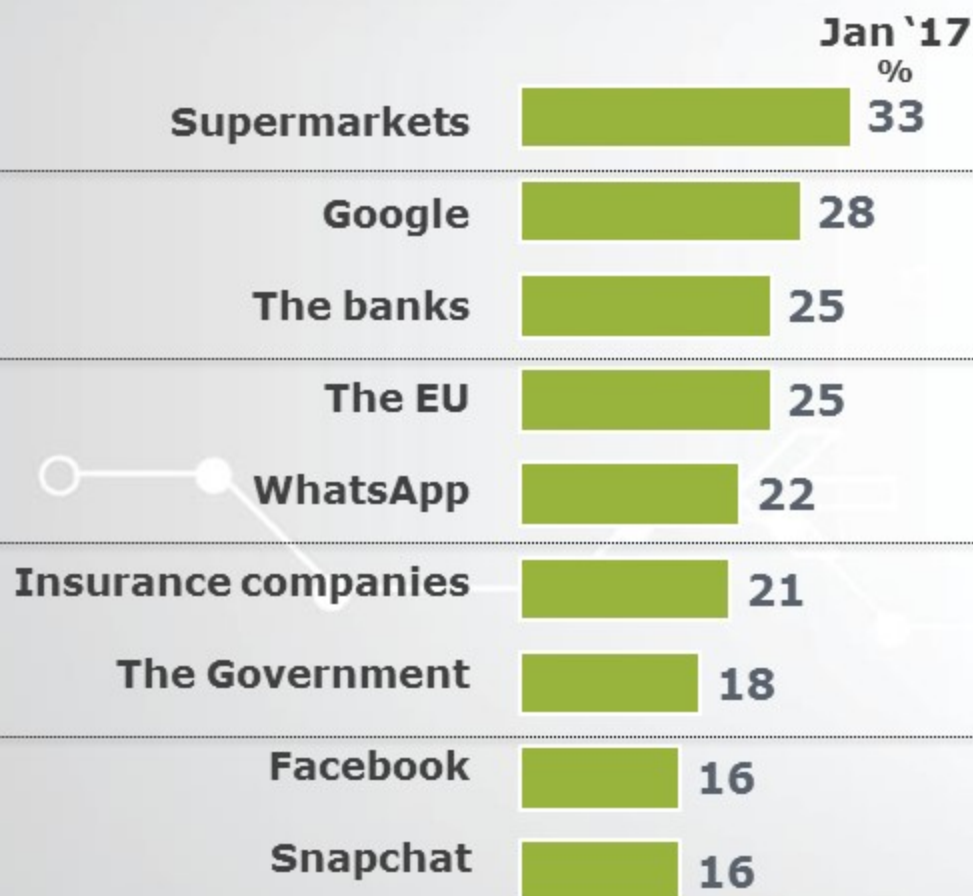
	Total	Gender		Age				Class		Region				Area	
		Male	Female	16-24	25-34	35-49	50+	ABC1	C2DEF	Dublin	Leinster	Munster	Conn/Uls	Urban	Rural
Base:	667 %	302 %	365 %	110 %	160 %	265 %	132 %	375 %	292 %	197 %	159 %	217 %	94 %	447 %	220 %
The last thing I do at night is check emails, text messages or social media sites	54	53	56	80	57	46	35	56	53	51	61	59	43	53	57
The first thing I do in the morning is check emails, text messages, or social media sites	51	51	50	72	51	47	30	54	48	52	53	51	43	52	48
I'm getting tired of Facebook	43	43	43	32	47	44	49	42	44	43	41	43	46	42	44
I can't imagine my life without social media	38	36	40	53	40	33	26	35	42	33	39	45	37	38	39
I'd hate to be the type of person who only has a few friends on Facebook	23	20	25	35	25	17	16	18	27	19	22	31	18	22	24



Low levels of trust are apparent when it comes to safe guarding our personal data

Base: All Adults 16+ - 1,000

% trust organisation to safeguard personal information
Top 2 box score



We trust supermarkets more than the EU or Government when it comes to safeguarding our personal information.

Q.11

There has been some discussion about trust and privacy issues regarding the use of our personal data – particularly with regard to our digital footprint. On a scale of 1-5 much if at all do you trust the following companies and organisations to safeguard your information? Where 5 means you trust them completely and 1 means you don't trust them at all?

Under 25s and Dubliners show higher levels of trust, while rural dwellers are less trusting

Base: All use social media sites - 667

% trust															
	Total	Gender		Age				Social Class		Region				Area	
		Male	Female	16-24	25-34	35-49	50+	ABC1	C2DE	Dublin	Leinster	Munster	Conn/Ulster	Urban	Rural
Base:	667 %	302 %	365 %	110 %	160 %	265 %	132 %	375 %	292 %	197 %	159 %	217 %	94 %	447 %	220 %
Supermarkets	33	29	36	44	31	30	27	28	37	28	30	35	41	34	31
Google	28	26	29	39	27	26	19	25	30	28	25	27	33	30	24
The banks	25	23	26	24	22	26	28	25	24	33	8	29	28	29	17
The EU	25	23	27	28	21	27	23	28	22	30	22	20	28	27	20
What's App	22	19	24	34	20	18	16	21	22	23	17	22	26	23	20
Insurance companies	21	17	24	22	18	20	24	19	23	27	8	26	20	25	13
The Government	18	17	19	13	15	21	22	19	16	27	3	22	16	23	8
Facebook	16	15	17	27	16	13	10	17	15	19	14	12	21	17	14
Snapchat	16	14	18	31	15	11	9	15	17	14	17	15	20	14	20

Q.11

There has been some discussion about trust and privacy issues regarding the use of our personal data – particularly with regard to our digital footprint. On a scale of 1-5 much if at all do you trust the following companies and organisations to safeguard your information? Where 5 means you trust them completely and 1 means you don't trust them at all?

Thank You!

Delve

Deeper



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