



eircom Household Sentiment Survey

Phase V – September 2014

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Introduction

What do you think the future holds for technology? Would you trust a robot with your dirty dishes – or your elderly relative? These are some of the questions we asked in our fifth **eircom Household Sentiment Survey**, the definitive behavioural barometer of technology usage in everyday Irish life.

Commissioned by eircom and conducted by Behaviour & Attitudes, the bi-annual report surveys over 1,100 Irish households, debunking the myths and examining the ever-changing face of technology. This year, for the first time, we shine a spotlight on Cork, Limerick and Galway with fascinating results.

Amongst the wide-ranging findings from the latest eircom Household Sentiment Survey (eHSS), we reveal the increasing reliance on technology to measure and validate our activities, while still remaining faithful to the old favourite, TV. We also examine attitudes to changes in technology, exploring how comfortable Irish people are with future tech.

We compare how quickly the technology landscape is changing, evidenced by the surge in tablet ownership and the rise and fall of new and old social media. As technology becomes ever more integral to our lives, the eircom Household Sentiment Survey provides a unique insight into the impact on Irish society.

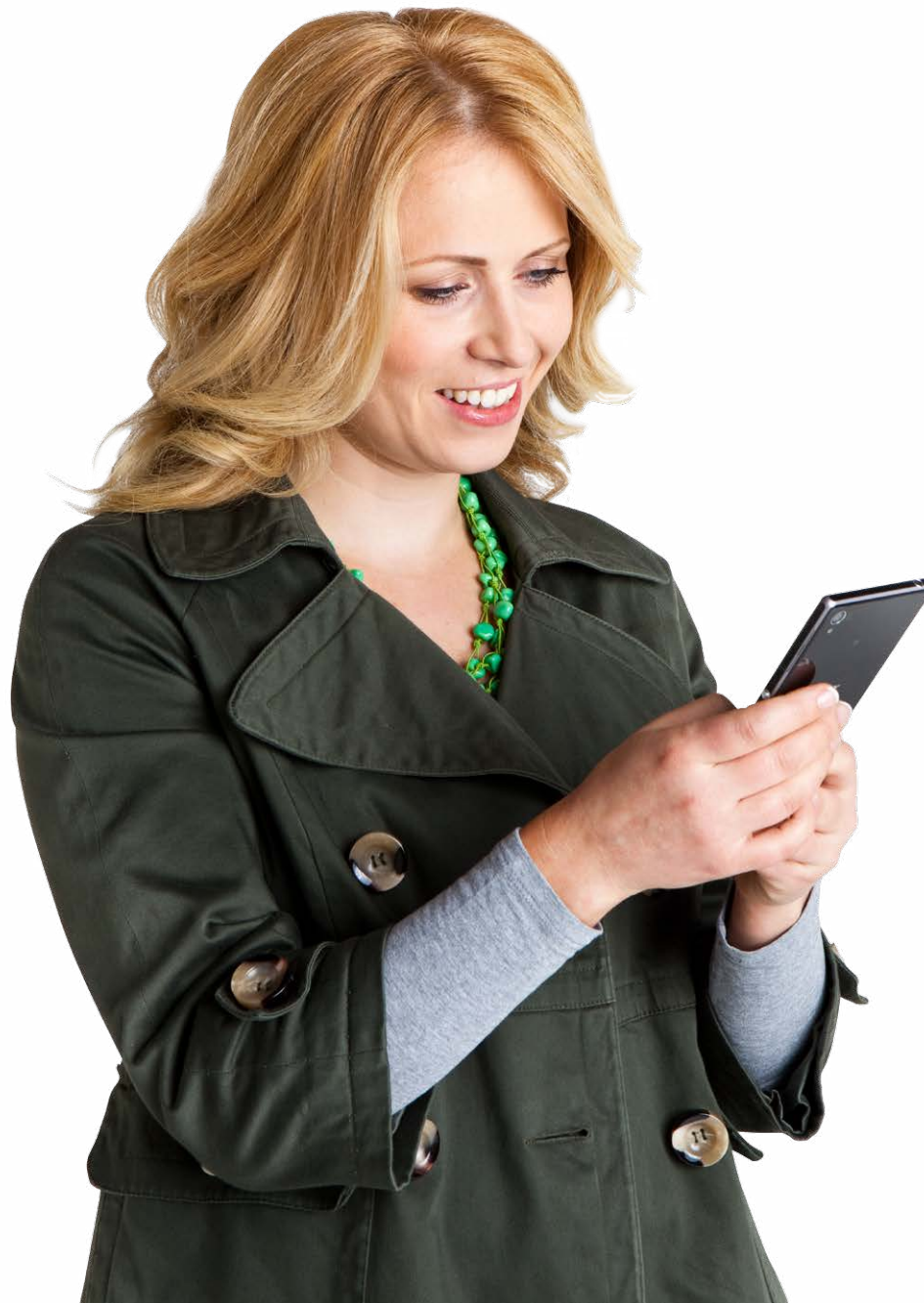
The full report will be available online at www.eircom.net/pressroom from 9am Monday 29th September 2014



1 Key Themes

Digital devices in the home





85%

85% of adults now have access to an online device which can be used on-the-go.

This is a significant increase from 79% in August 2013.

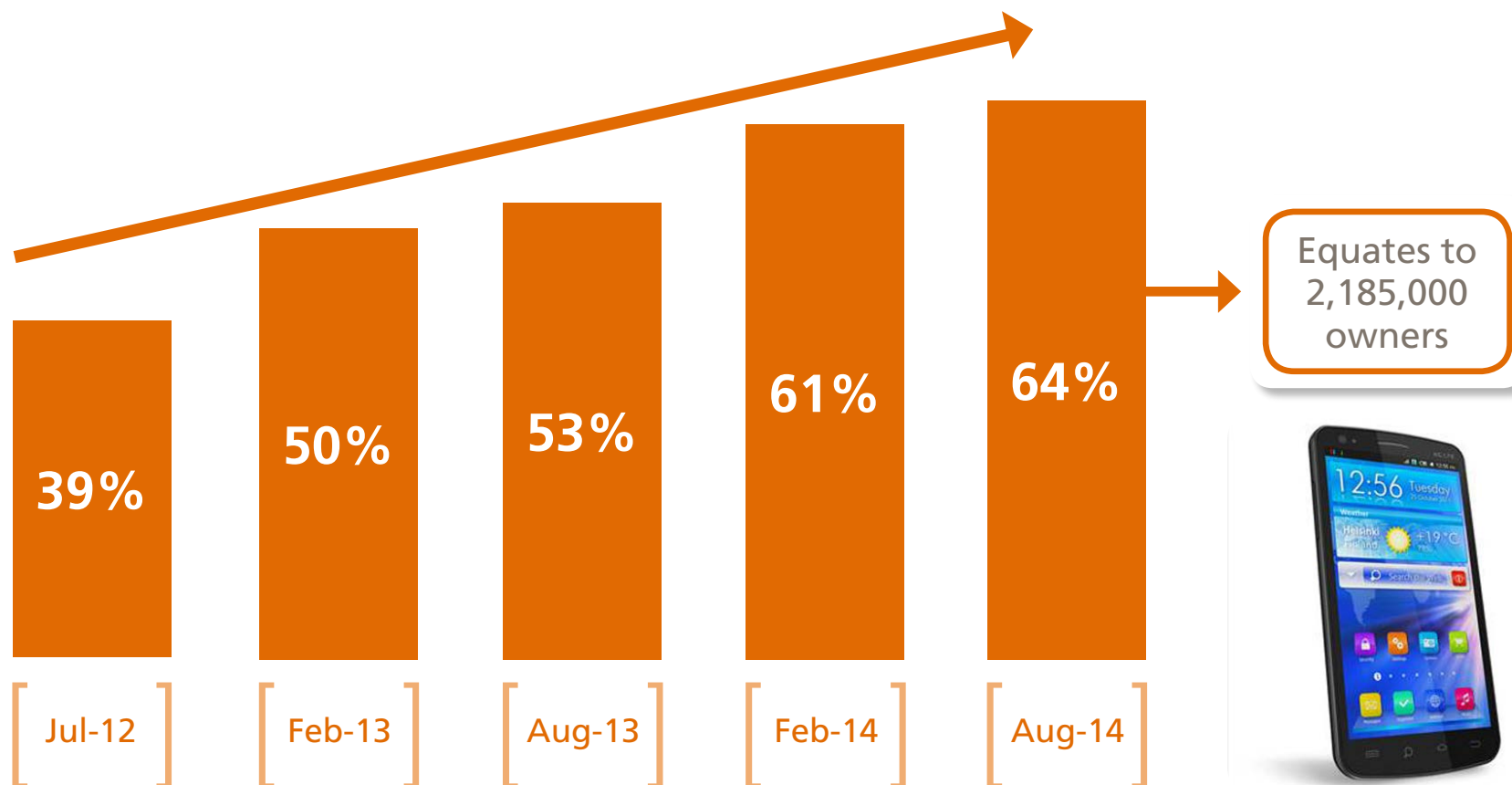
**4**

The average number of potential online on-the-go devices in the home increased from three to four since August 2013.

(The average is six for 16-24s)

Claimed smartphone ownership continues to grow

Base: All with mobile



? Question

Do you own a smartphone? 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.

Tablet prevalence

August 2014

41% have access to a tablet in August 2014
(1,472,000 adults 16+)

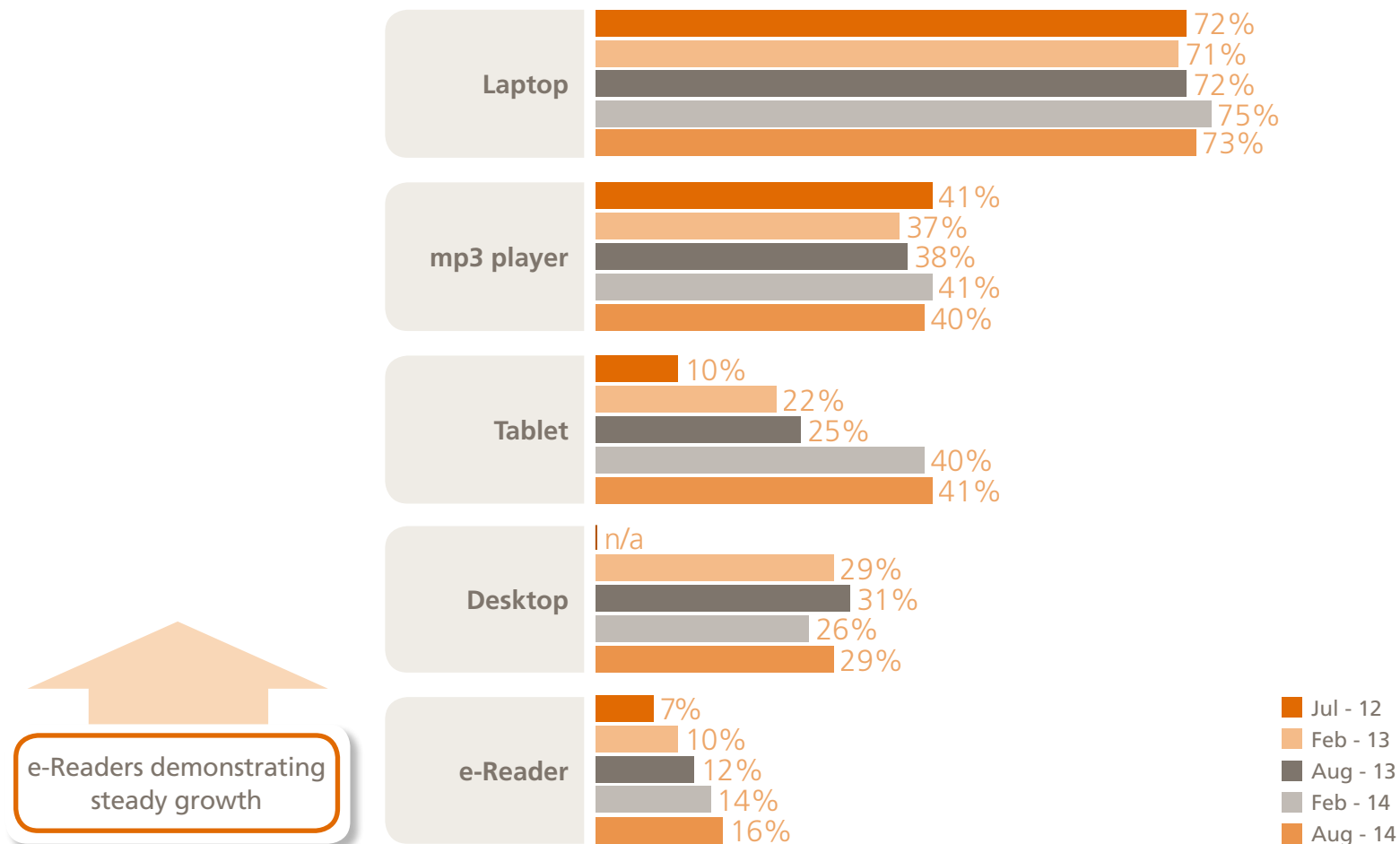
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16% of those without a tablet are likely to get one this year
(331,000 adults 16+)

↓

Potential for **1,803,000** adults to have access to a tablet by the end of the year

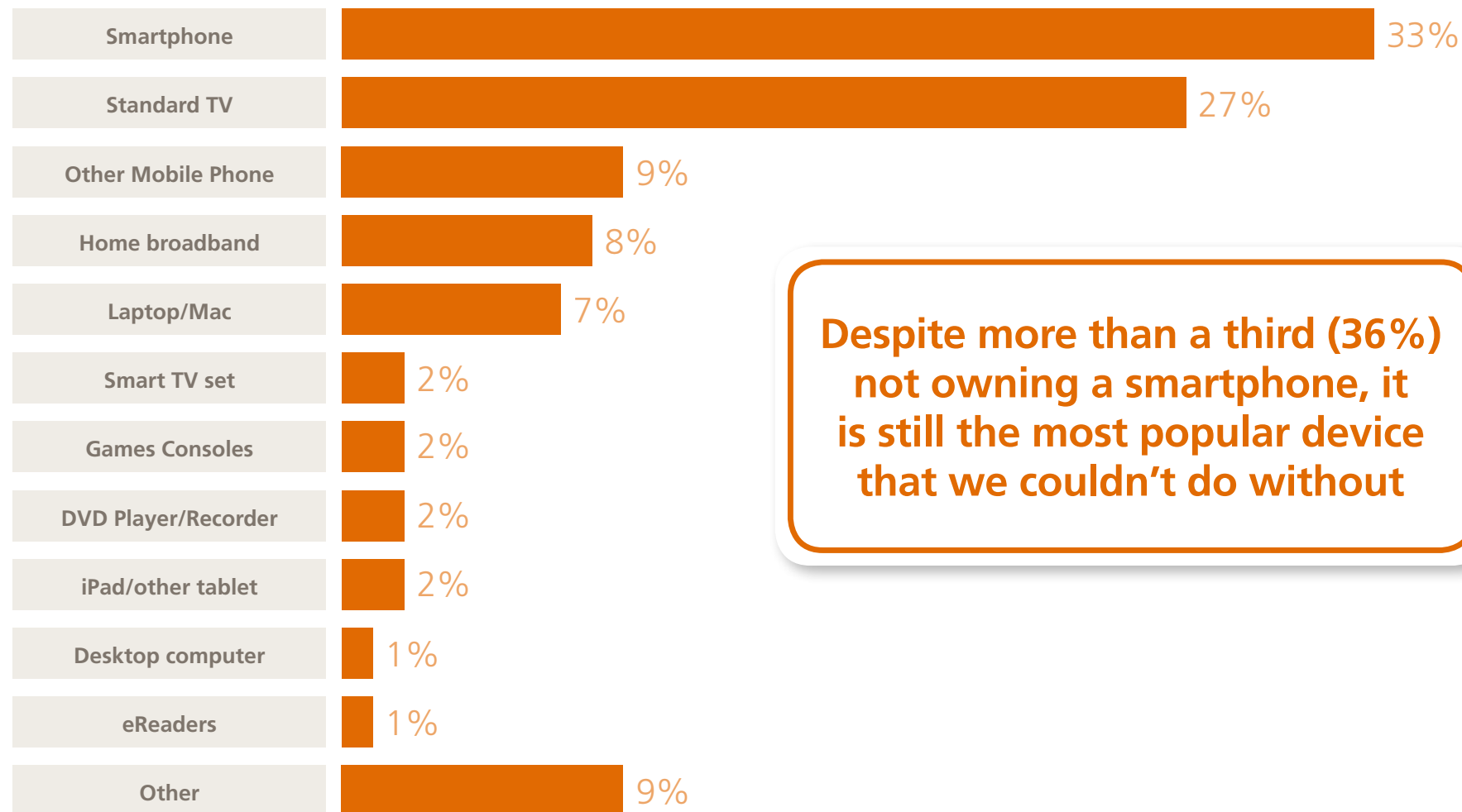
Devices in the household



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

What device could you not do without for one week?

Base: All having relevant devices



Despite more than a third (36%) not owning a smartphone, it is still the most popular device that we couldn't do without

? **Question** If you definitely could not do without one of the following for a week which one would it be?



52%

**Half of
smartphone
users (52%)
definitely
couldn't do
without one
for a week**

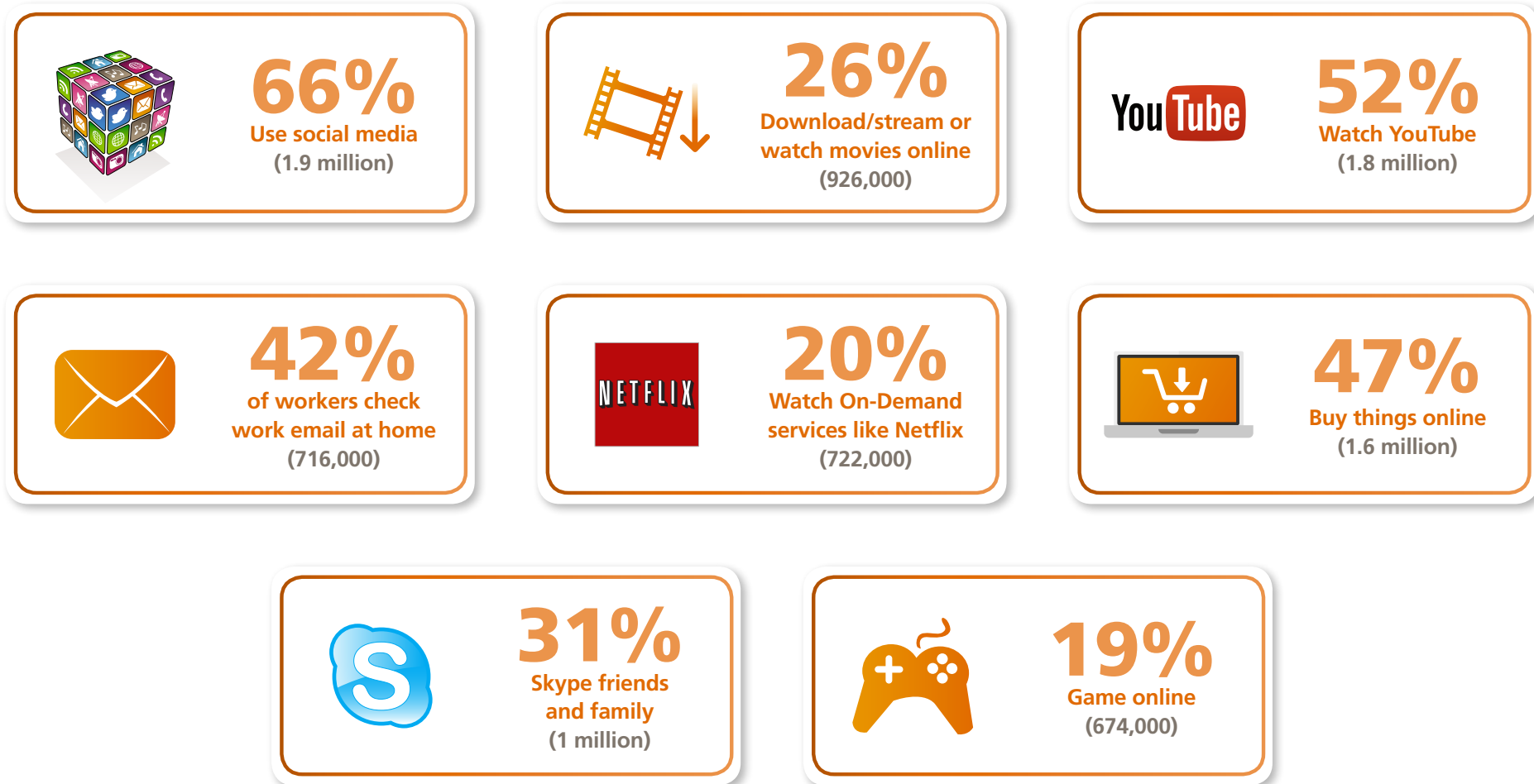
2 Key Themes

Online behaviour at home



Dynamic online behaviour at home

Did you know that...



? Question Which of these do you do at home?

69%

**69% of the population
access the internet
once a day or more,
rising to 96% of
16-24 year olds.**

The Snapchat Phenomenon

Base: All 16-24s

Snapshot vying to be
the third most used
social media for
16-24 year olds



3

Key Themes

TV rules the home

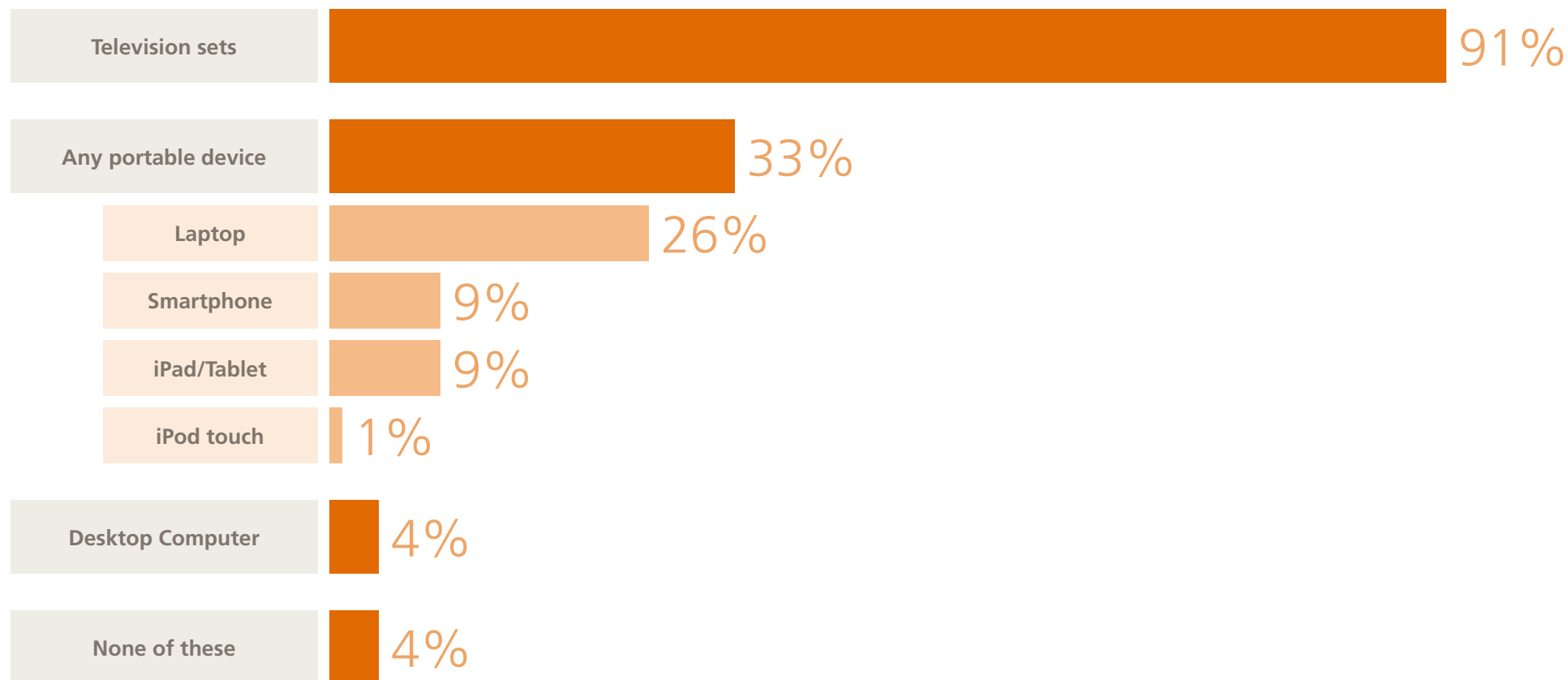


**Half of 16-34s
watch TV
programmes on
a portable device**



Devices used to watch television programmes

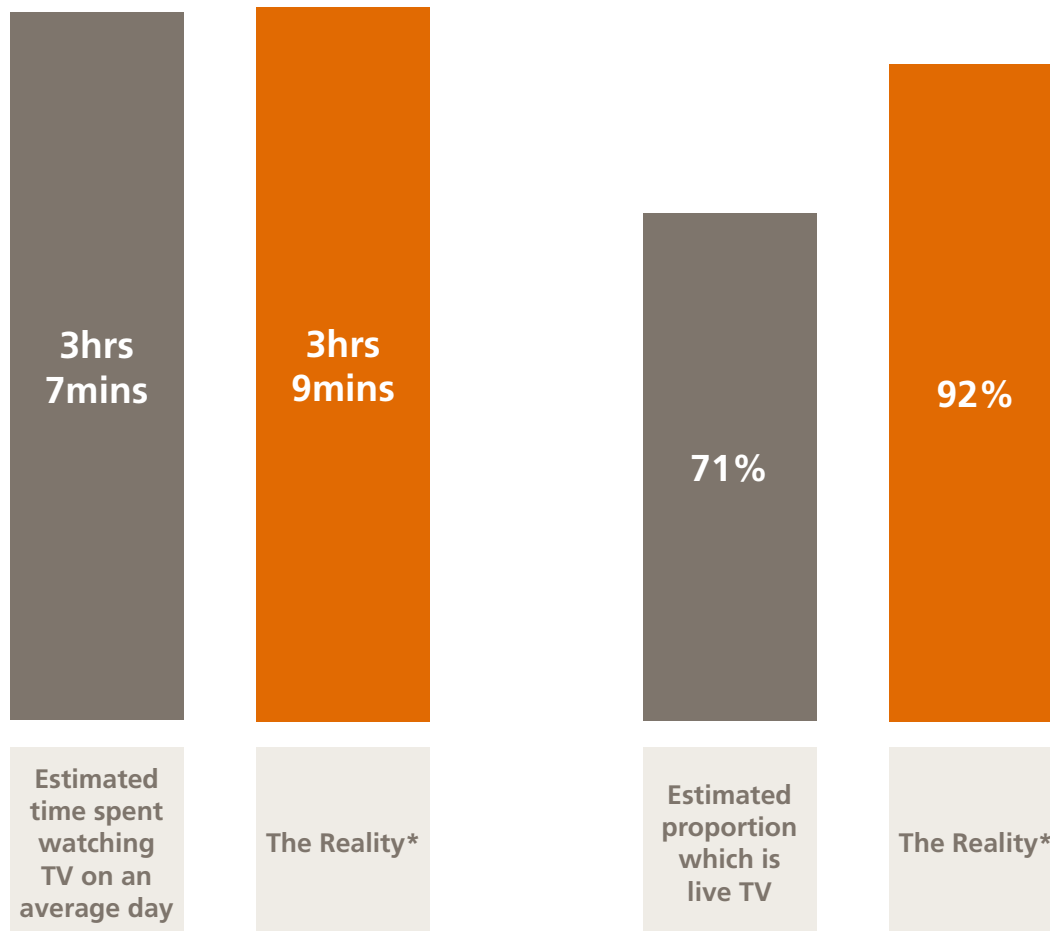
Base: All adults 16+



? Question

Which of these devices do you use to watch television programmes on nowadays?
By television programmes we mean live or catch up sports events, series episodes, films or actual programmes.

TV Viewing Perception vs Reality



People are quite accurate in their recall of time spent watching TV – however, they watch more live TV than they think

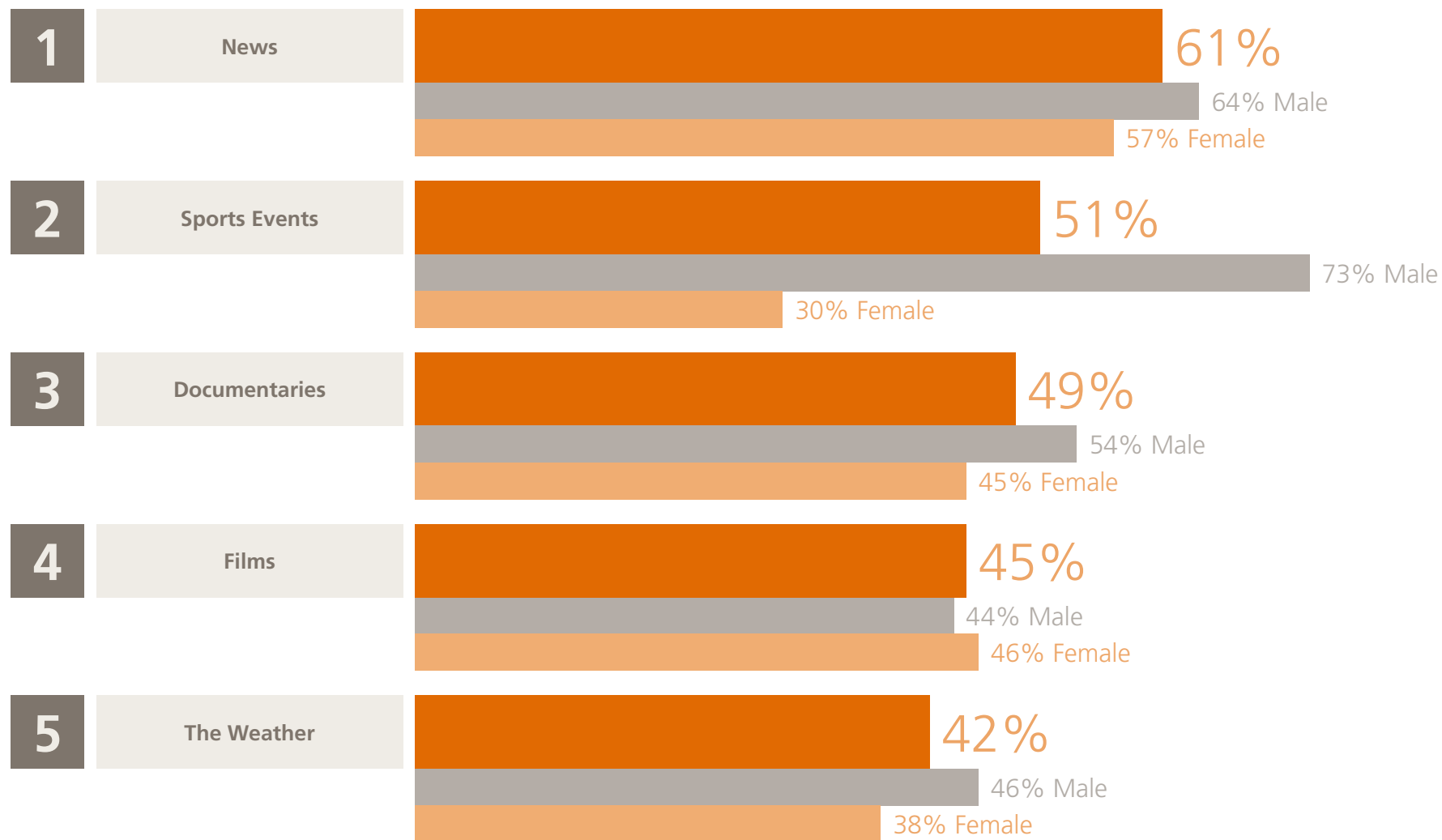


? Question

In an average day, approximately how much time do you spend watching TV? Of the time you spend watching television (excluding DVDs and programmes you recorded more than a week before), what proportion of that time is spent watching it live?

*Source: TAM Ireland Ltd / Nielsen TAM / Av mins, Total TV, Consolidated, National

Top 5 – TV content that must be viewed live



Question Which of the following programmes or TV content do you have to watch live on TV (i.e. not record or download post airing)?

'Intelligent' TV delivery in the future viewed as an improvement by three in four people



? Question

Technology now exists which can help 'learn' about a TV viewers preferred programmes. Thus in the future TVs will be able to deliver the programmes you want (much like Amazon suggesting books you like) so no more hunting through the list of channels to find something to watch, what do you think?

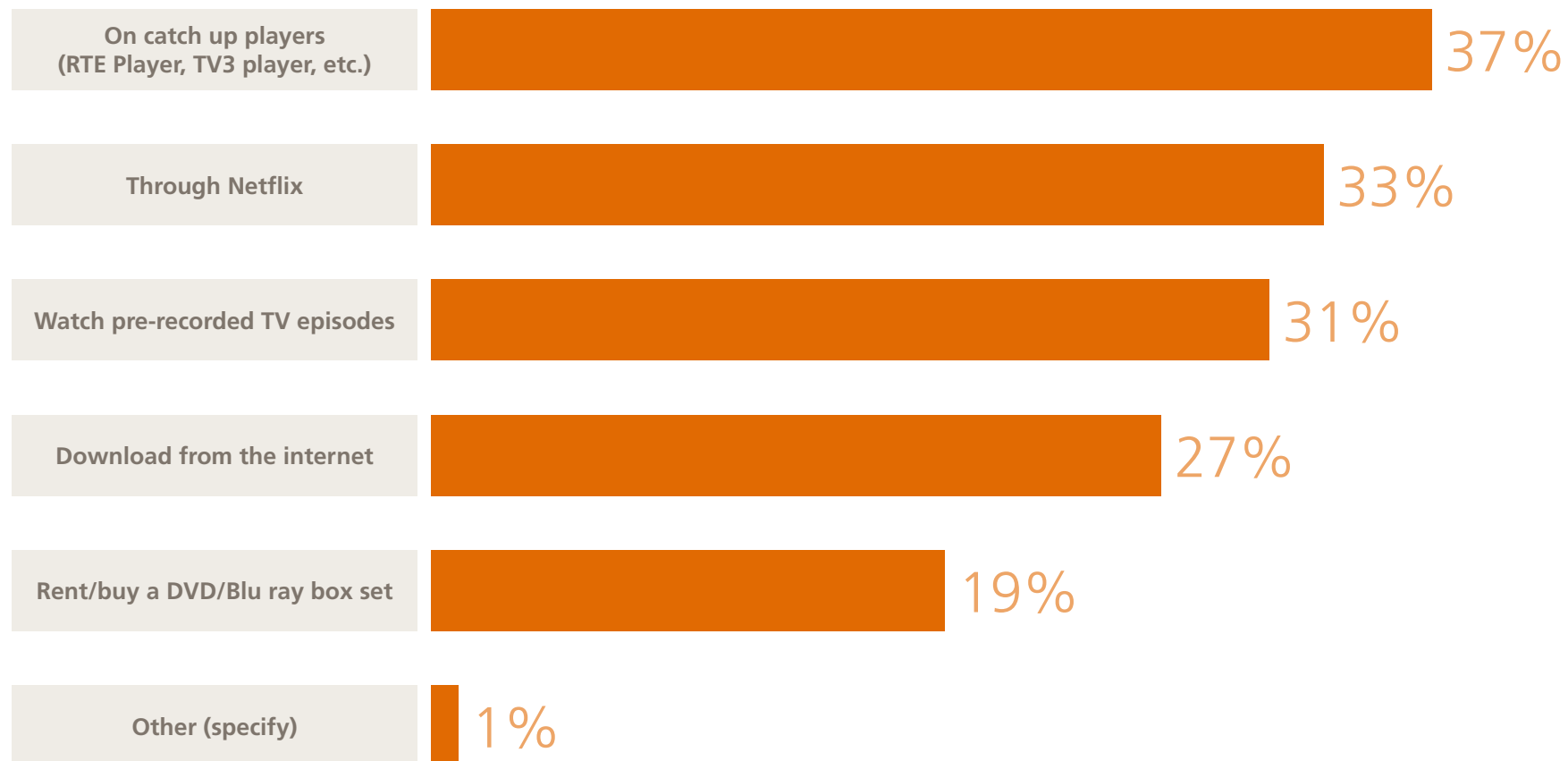
**40% (1.4 million people)
'binge' on TV programmes...
with Dubliners heavy bingers
(51% vs 36% outside Dublin)**

**Question**

How, if at all, do you 'binge' on TV programmes? By bingeing we mean the viewer consumes several hours of the same programme (like box sets) back-to-back in a single sitting?

How we 'binge' on TV programmes

Base: Of those who binge on TV programmes



? Question

How, if at all, do you 'binge' on TV programmes? By bingeing we mean the viewer consumes several hours of the same programme (like box sets) back-to-back in a single sitting?

**24% have downloaded a movie/
series/ programme to watch on
a mobile device (40% of 16-34s) –
86% of the time at home**



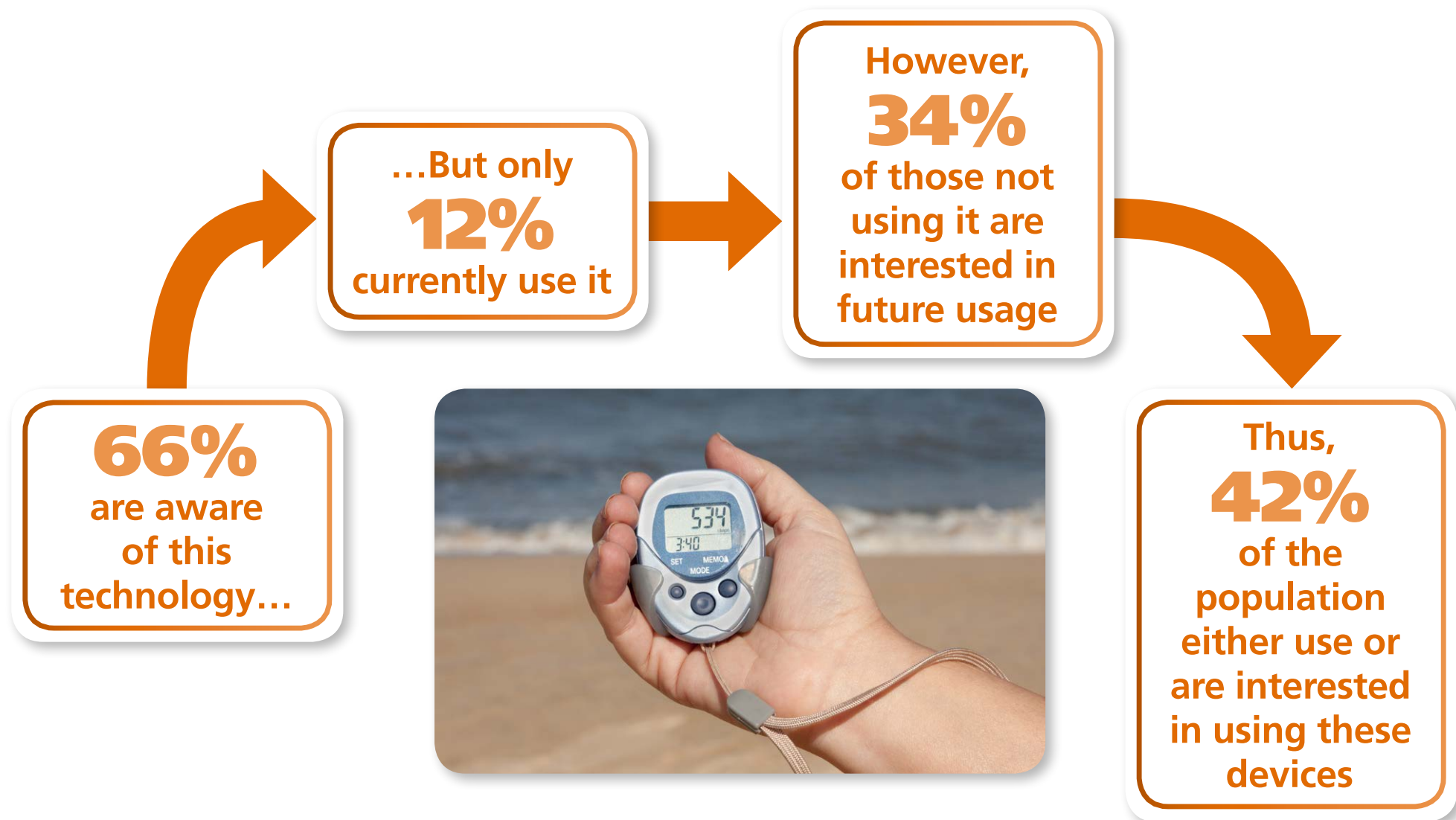
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Key Themes

Lifelogging: a measurement for happiness



Lifelogging: Self-knowledge through self-tracking

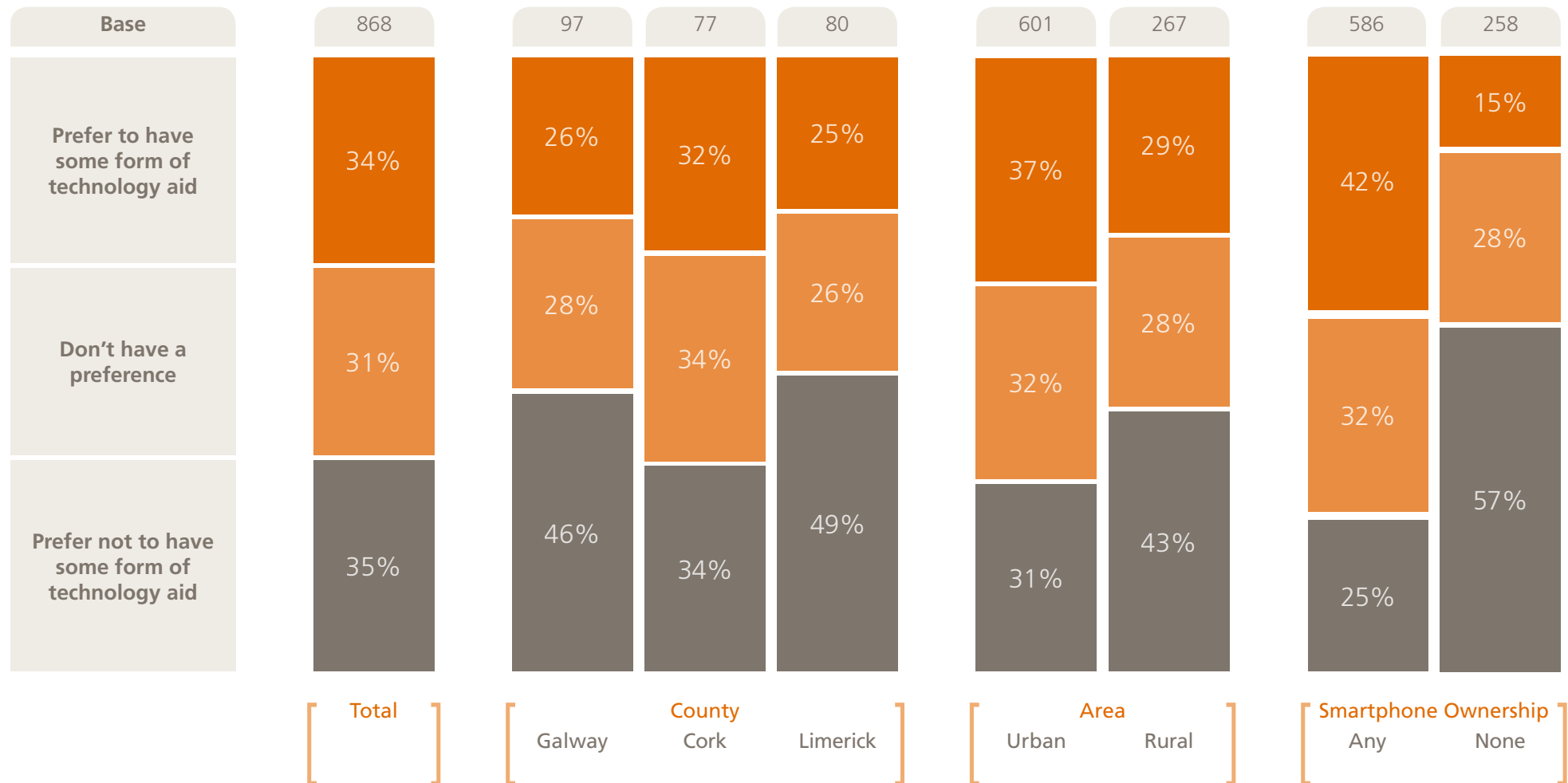


? Question

Some people are into using technology to measure what they are doing. For example some people use pedometers to measure what they have achieved in terms of miles or numbers of steps walked, calorie burnt, etc. Thus most things can get quantified and measured rather than just experienced

1 in 3 prefer to have some form of Tech Aid when exercising (2 in 3 for 16-24s)

Base: All adults 16+ undertaking any form of exercise



Question

When exercising some people like to use some form of technology aid to keep them motivated. These can range from listening to music through ear phones to using an app to calculate distance ran etc. Do you prefer to exercise using some form of technology aid, or go without?

**3 in 5 of those
using lifelogging
devices get a buzz
from 'rewarding'
notifications**



5 Key Themes

The future is here

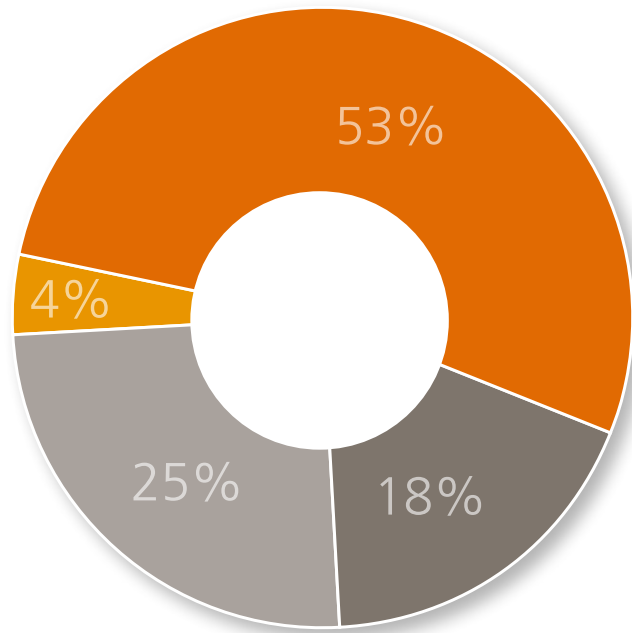




Two in three believe that technological changes will lead to a future where people's lives are mostly better

Tech Ireland: Homes of the Future

Change for better or worse



- Better
- Both good and bad
- Worse
- Don't know

Lifelike robots will help fulfil household tasks such as cleaning, washing etc.



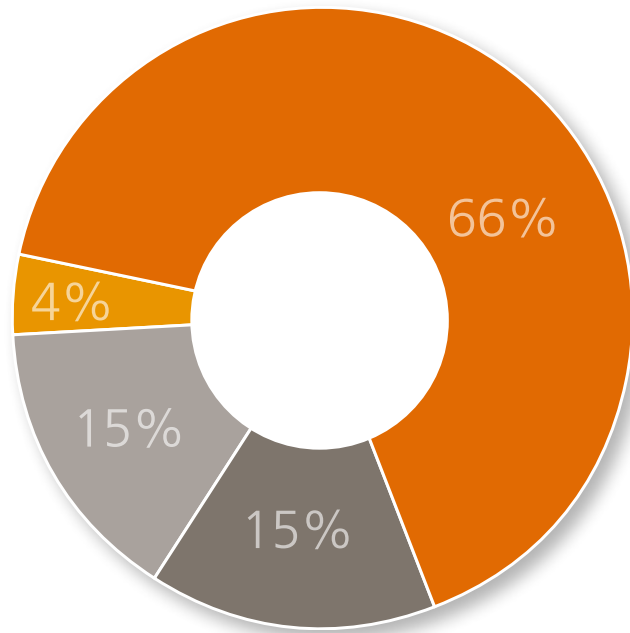
50%
would use

? Question

In the next 20 years, how likely do you think it is that there will be Lifelike robots to help fulfil household tasks such as cleaning, washing etc. Is that a change for better or worse? Would you use this?

Tech Ireland: Homes of the Future

Change for better or worse



- Better
- Both good and bad
- Worse
- Don't know

The ability to adjust and run household appliances remotely (eg start the washing machine, switch on the oven/heating etc.)



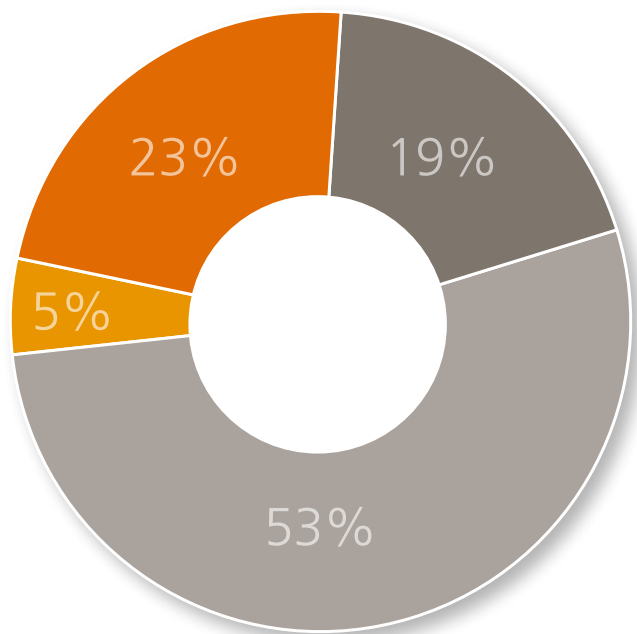
68%
would use

? Question

If the ability existed to adjust and run household appliances remotely (eg start the washing machine, switch on the oven/heating, record a TV programme etc.), would this be a change for the better or worse? Would you do it?

Tech Ireland: Future Healthcare

Change for better or worse



- Better
- Both good and bad
- Worse
- Don't know

Use a lifelike robot as a primary care giver for an elderly relative or person in poor health



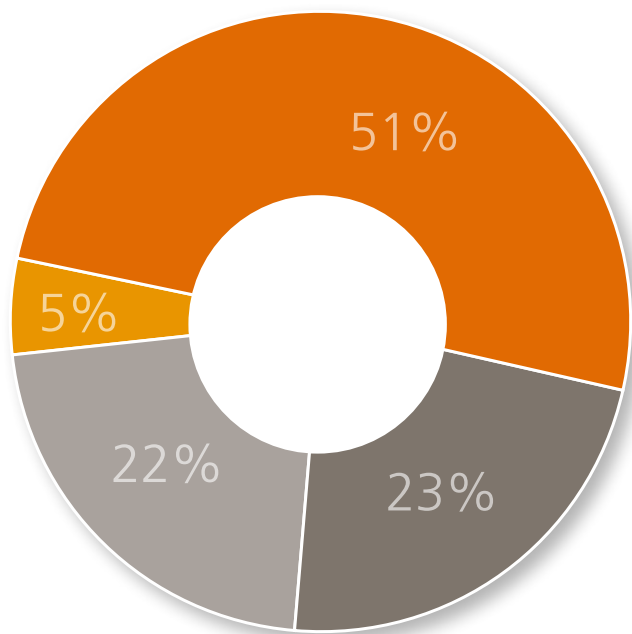
18%
would use

Question

In the next 20 years, how likely do you think it is that we will Use a lifelike robot as a primary care giver for an elderly relatively or person in poor health? Is that a change for better or worse? Would you use this?

Tech Ireland: Wearable Tech

Change for better or worse



- Better
- Both good and bad
- Worse
- Don't know

People will be able to wear devices (eg glasses, watches etc.) that will constantly show them real-time information



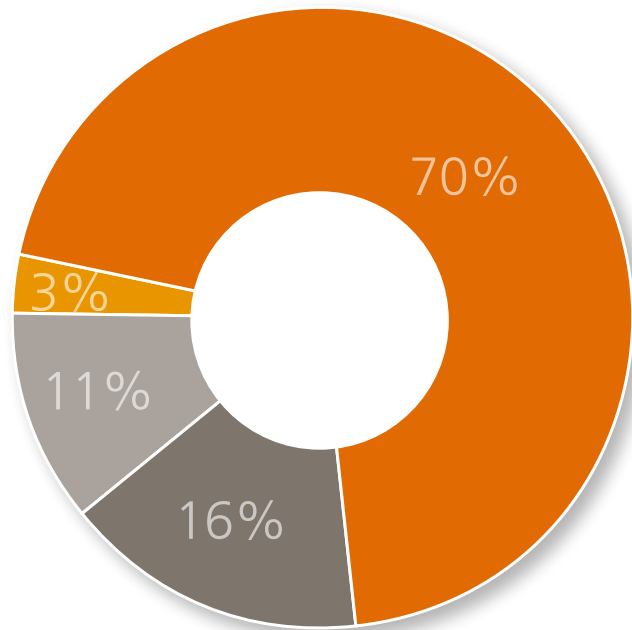
46%
would use

? Question

In the next 20 years, how likely do you think it is that people will be able to wear devices (eg glasses, watches etc.) that will constantly show them real-time information about the world around them (e.g. where friends family are, suggest places to go, give the quickest route to a location, etc.)? Is this better or worse? How likely are you to use this?

Tech Ireland: Workplaces of the Future

Change for better or worse



- Better
- Both good and bad
- Worse
- Don't know

Smart work centres (i.e. offices with advanced technology on the outskirts of cities to avoid long commutes to city centres for workers – (so flexible working))



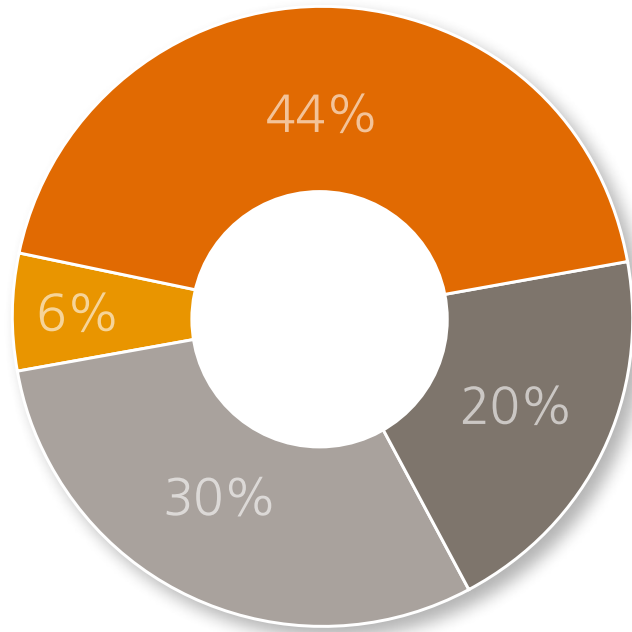
62%
would use

Question

In the future, if Smart work centres (ie offices with advanced technology on the outskirts of cities to avoid long commutes to city centres for workers – (so flexible working)) existed, would you use them? Is this a change for better or worse?

Tech Ireland: Future Travel

Change for better or worse



- Better
- Both good and bad
- Worse
- Don't know

Technology will be available that will use geo-location (GPS) and satellite feeds that will drive your car for you once you tell it where to go – in essence a driverless car.



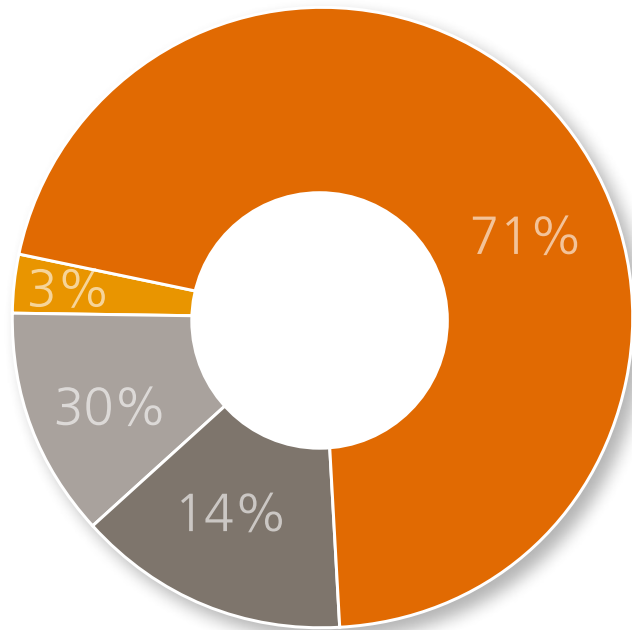
36%
would use

Question

In the future, if Technology was available that used geo-location (GPS) and satellite feeds that will drive your car for you, once you tell it where to go – in essence if a driverless car existed, would you use them? Is this a change for better or worse?

Tech Ireland: Future Shopping

Change for better or worse



- Better
- Both good and bad
- Worse
- Don't know

Use your mobile phone to pay for goods and services

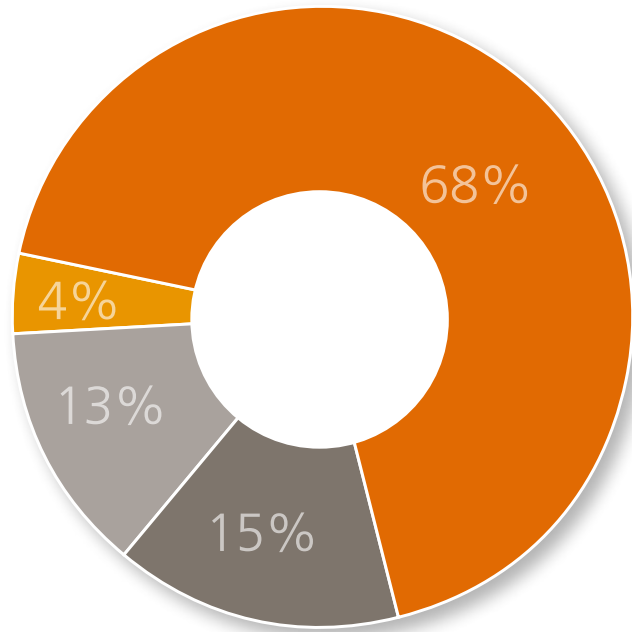


73%
would use

? Question In the future, if you could Use your mobile phone to pay for goods and services, would you do it? Is this a change for better or worse?

Tech Ireland: Future Learning

Change for better or worse



- Better
- Both good and bad
- Worse
- Don't know

High quality university courses streamed via superfast broadband to bring the classroom into your home or on-the-go?



59%
would use

? Question

In the future, if you could avail of High quality university courses streamed via superfast broadband to bring the classroom into your home or on-the-go, would you do it? Is this a change for better or worse?

6

Key Themes

Have **you**
ever...?



Have you ever...?

Base: All Adults 16+

Shopped online



57% all adults 16+
78% 16-34s
61% Dublin

Shopped online via your mobile



39% of all Smartphone users
46% of 25-34s

Queued up to get the latest Tech Devices



19% of 16-34s

? Question Thinking back honestly, have you ever...?

Have you ever...?

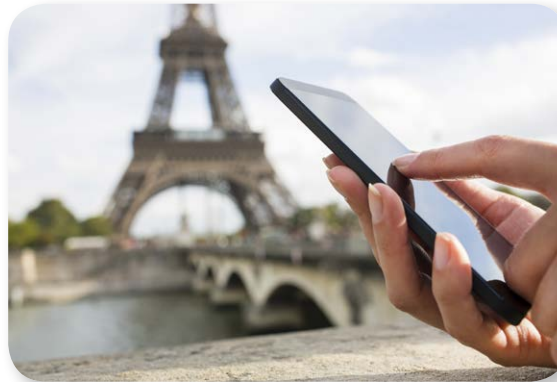
Base: All Adults 16+

Used an app to keep track of fitness/exercise



28% 16-34s

Used wi-fi abroad to access internet



71% of all smartphone users
72% of 16-34s

Played 'ping pong' texting



41% of 16-24s

? Question Thinking back honestly, have you ever...?

Have you ever...?

Base: All Adults 16+

Checked in with your friends via Facebook when out and about



47% of social media users

Had your selfie photo-bombed by someone



34% of 16-24s

? Question Thinking back honestly, have you ever...?

7

Key Themes | **Cork: an overview**

Minimum of 100 interviews

- The average number of potential OTG devices in Cork homes is **four**
- **61%** of adults in Cork own a smartphone
- **37%** of Cork people couldn't do without their TV for a week
- **56%** of Corkonians pay bills online – 15% points higher than the national average
- **70%** of Cork people access the internet at least once each day
- **21%** of Cork people use LinkedIn, higher than the national average of 14%
- Cork people watch the most TV with an average of **223 minutes** (3.7 hours) each day
- **53%** of Cork people predict that robots will be used as caregivers for sick or elderly people, but only **16%** would be comfortable using them

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Key Themes

Galway: an overview

Minimum of 100 interviews

- The average number of potential OTG devices in Galway homes is **three**
- **70%** of adults in Galway own a smartphone
- **47%** of people in Galway couldn't do without their smartphone for a week
- **29%** of Galwegians game online – 10 points higher than the national average
- **73%** of Galwegians access the internet once per day
- **68%** of Galway's adults use facebook
- Almost **half** (49%) of Galway people watch pre-recorded TV and download programmes from the internet
- Galway is the most eager to embrace future technology – with **83%** saying it will make a change for the better
- **80%** of Galway people feel that driverless cars will happen, compared to **42%** of Limerick people
- **10%** of Galway people have photo-bombed a celebrity

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Key Themes

Limerick: an overview

Minimum of 100 interviews

- The average number of potential OTG devices in Limerick homes is **three**
- **57%** of adults in Limerick own a smartphone
- **29%** of Limerick people couldn't do without their TV for a week
- **52%** of Limerick people use social media
- **60%** of Limerick people access the internet at least once per day
- **31%** of Limerick people use Viber messenger – more than anywhere else in the country
- **94%** of Limerick people watched a recent sporting event (Wimbledon, the World Cup etc) on a TV set
- Only **38%** of Limerick people would use a robot for household chores – compared with 62% in Galway!

Thank you

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