B&A TechScape 2023

June 2023

J. 234615

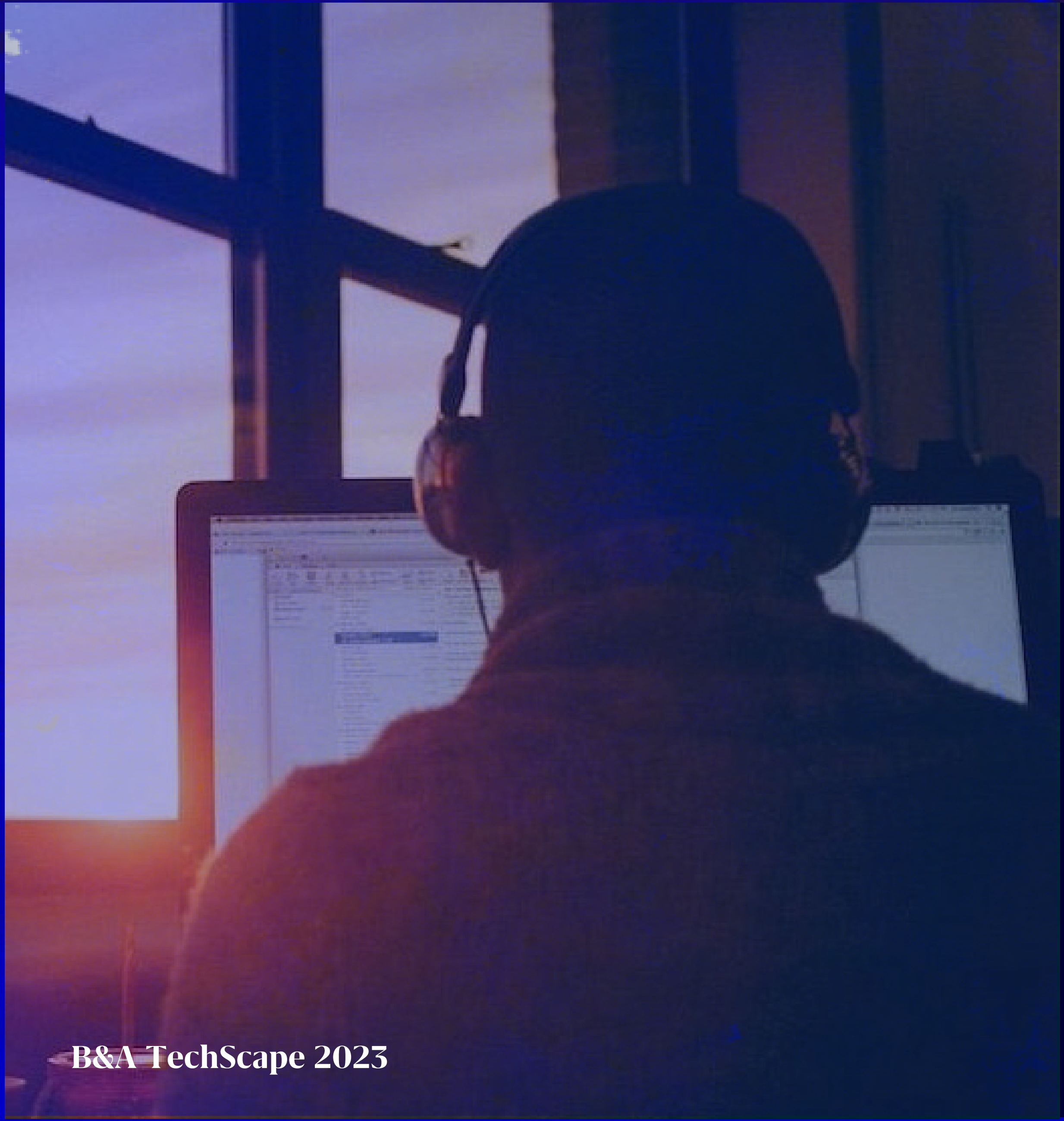
Prepared by:
Luke Reaper &
Katie Kirkwood

@behaviourandattitudes

Behaviour & Attitudes

@banda_ie

Delve Deeper


B&A TechScape 2023

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B&A

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 of the online population.

The fieldwork for this study was conducted during May 2023.

A note on the generational definitions used in TechScape

In order to gain deeper insight into the tech habits of Irish consumers, **demographic analysis** has been conducted on the findings from this year's TechScape. We have also included five different generations.

The definitions and size of prize of each have been detailed below:

GenZ

Born 1997 – 2012
Age 16 – 26

17%

661,000

Millennials

Born 1981-1996
Age 27 - 42

30%

1,192,000

Gen X

Born 1965-1980
Age 43-58

24%

949,000

Baby Boomers

Born 1946-1964
Age 59-77

24%

958,000

Silent Gen

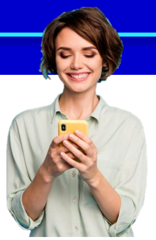
Born 1945+
Age ≤78

5%

185,000

'000s & %s = their proportion in the population aged 16+ years

Important we understand the developed lifestage and age (and overlap) of the 'Generation' jargon – Gen Z growing up

						
	Total pop	**Gen Z**	**Millennials**	**Gen X**	**Baby Boomers**	**Silent Gen**
	3,945	661	1192	949	958	185
Base:	*1000*	*150*	*287*	*240*	*271*	*52*
Gender						
Male	49	51	49	50	48	44
Female	51	49	51	50	52	56
Lifestage						
Single	36	**84**	**20**	**22**	34	**55**
Pre Family	7	7	**19**	**3**	**-**	**-**
Family Pre School	12	**5**	**33**	**3**	**1**	**-**
Family Pre Teen	14	**2**	**22**	**24**	**2**	7
Family Teen	6	**2**	6	**16**	**1**	**-**
Empty Nester	25	**-**	**-**	**33**	**62**	**38**

🟥 Significantly lower
🟩 Significantly higher

* ***Definition:*** *single/widowed/divorced and no children under 18 yrs*
** ***Definition:*** *married (cohabiting) and 45+ and no children under 18 yrs*

Key Themes

Key themes

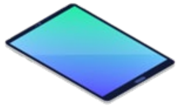
1.

The move toward a 'smart' home continues (i.e. growth in Smart TVs, laptops, games consoles and smart hubs / assistants).

2.

While the socio-economic tech divide still persists (i.e. tech equipment in the home), signs that the regional divide is lessening.

3.



Organisations need to understand that only two-thirds (69%) of those aged 65+ ever access the internet. Notwithstanding this, since 2019, pre-covid, we have seen an increase of +21%pts.

4.

Almost two thirds (63%) are concerned about AI.

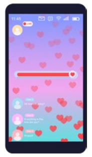
5.

Digital banking growing at staggering rate in Ireland.

6.

Broadband is an essential utility.

7.



Reliance on OTT / Social Media for communication.

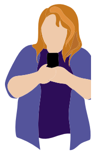
8.

Growth in visual social media.

9.

Gen Z show signs of growing desire for authenticity (albeit still highly connected to tech).

10.



We are acutely aware of the negative impacts of technology.

11.

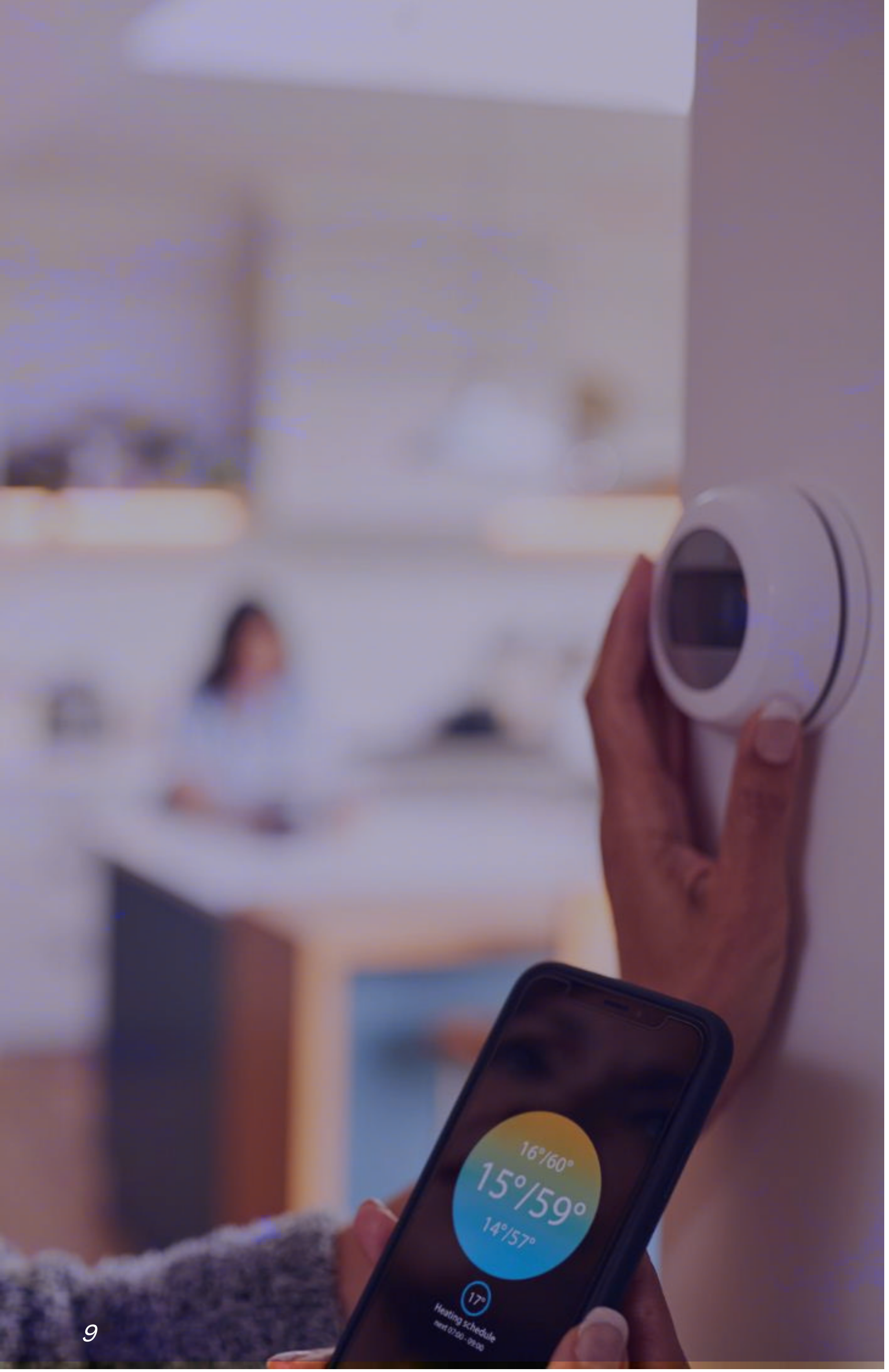
Data privacy growing in importance.

12.

Influencers/internet celebrities are important (especially for Gen Z).

13.

81% of population now purchase online (increase of 6% pts on 2022).



Key Themes in 2023

1) The move toward a ‘smart’ home continues (i.e. growth in Smart TVs, laptops, games consoles and smart hubs / assistants).

2) While the socio-economic tech divide still persists (i.e. tech equipment in the home), signs that the regional divide is lessening.

3) Organisations need to understand that only two-thirds (69%) of those aged 65+ ever access the internet. Notwithstanding this, since 2019, pre-covid, we have seen an increase of +21%pts.

4) Almost two thirds (63%) are concerned about AI
   - 9% have tried Chat GPT, mainly for curiosity. 2 in 3 (68%) feel AI should be regulated. Millennials are most fearful for their jobs (65%).

5) Digital banking growing at staggering rate in Ireland
   - 44% now use one (i.e. Revolut, N26, Monzo, etc) – 57% amongst middle class
   - General online banking also increasing
   - 44% now use a digital wallet (e.g. paying by mobile / smartwatch in store).

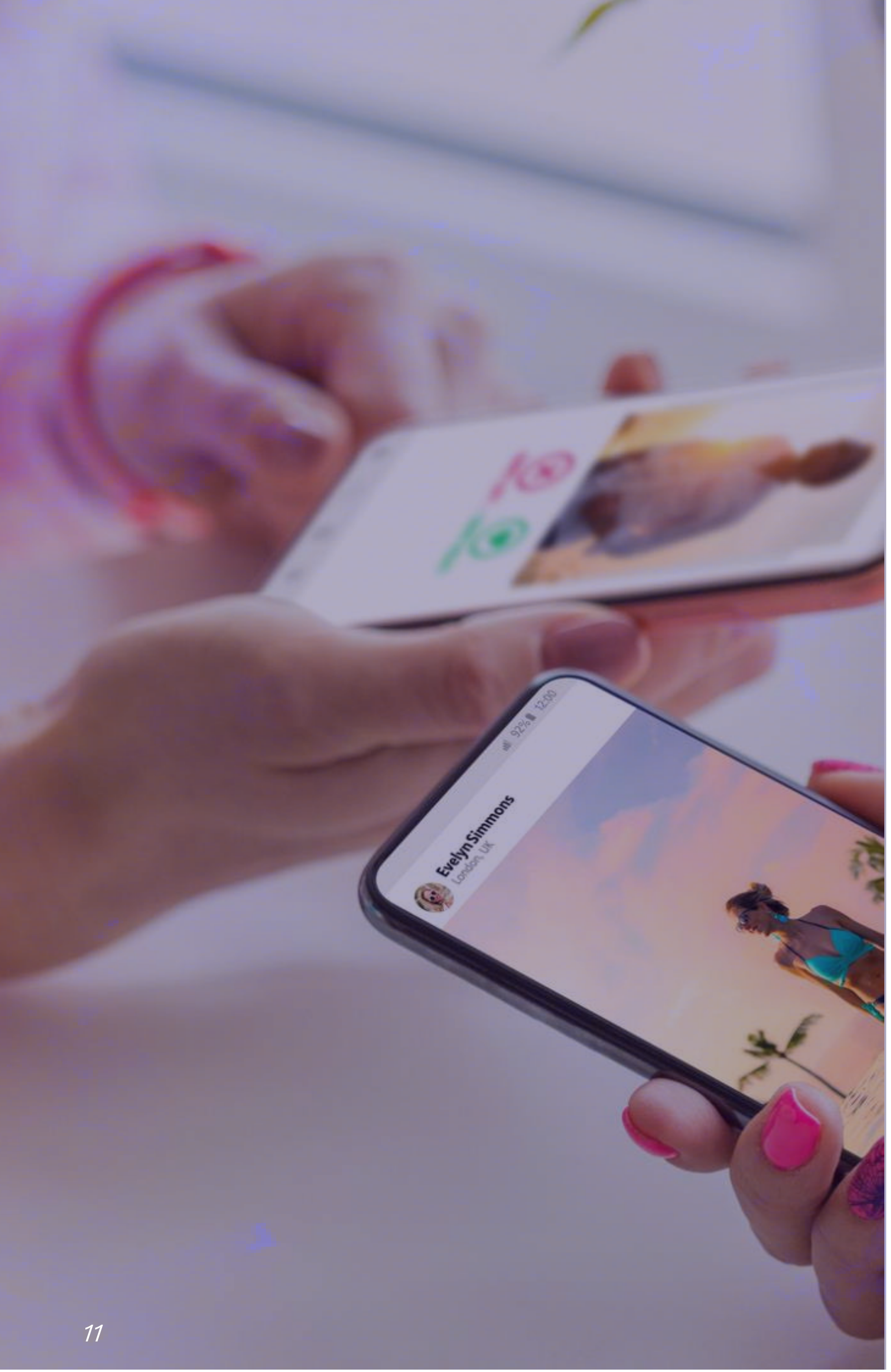
Key Themes in 2023

6) Broadband is an essential utility

- Facilitates working from home (which shows no sign of dissipating – 1 in 4 WFH to some degree), household chores, increased online purchasing, banking, and communications, as well as in-home entertainment - all of which are growing (or remaining stable).
- Large increase to 57% of the population believing broadband is more important than TV (up 10%pts)
- Disney+ grows to 35% of people viewing, Netflix 76%, Amazon Prime 38%, 10% Paramount+, and 14% Apple TV (any Paid Streaming 78% of the population)
- Music Streaming increases from 48% to 56%
- Online Gaming increases from 16% to 20%.

7) Reliance on OTT / Social Media for communication

- We are more reliant on instant messaging (76% of the population) and now 2 in 3 (69%) call via OTT services (WhatsApp the key player in this space)
- OTT crucial for communications (WhatsApp (90% of Gen Z); SnapChat (75% of Gen Z).



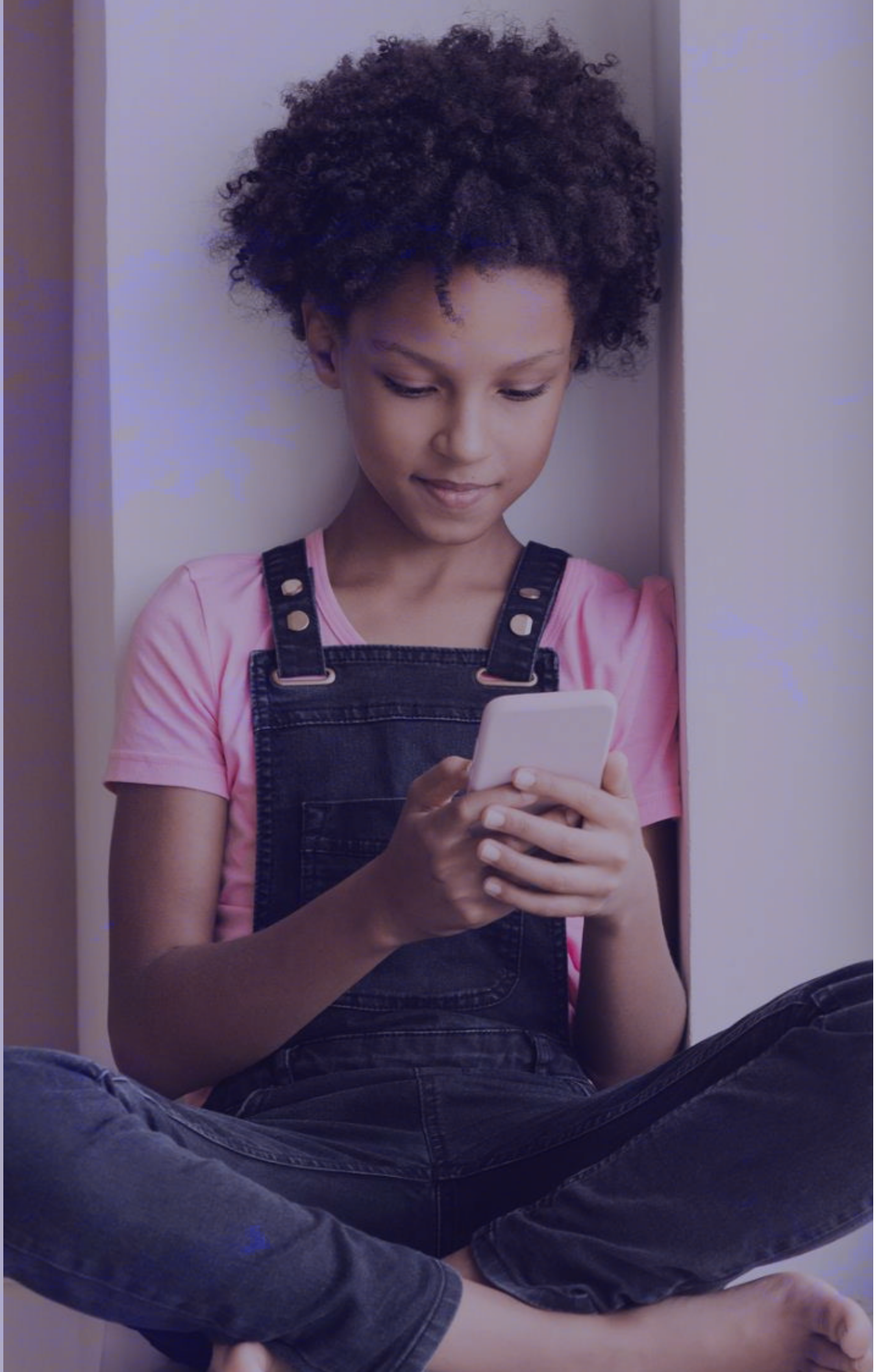
Key Themes in 2023

8) Growth in visual social media

- Instagram up 8%pts (55% using), TikTok up 3%pts overall, but much more significant growth among younger cohorts (76% of Gen Z), Pinterest up 4%pts (17%).
- 42% of Gen Z make TikTok videos.
- BeReal growth – 10% of Gen Z using this
- Online dating apps used by 19% of Gen Z.

9) Gen Z show signs of growing desire for authenticity (albeit still highly connected to tech)

- Showing a reduction in following brands on social media since 2022 (-11% to 68%).
- Use of online dating apps has also decreased from 29% in 2022 to 19% in 2023.
- Decreased use of standardized social media platforms like Instagram (-3%pts since 2022), while there are growing numbers using TikTok (+4%pts since 2022) and new platforms like BeReal (10% using in 2023). This will be an interesting space to monitor over the coming years.



Key Themes in 2023

10) We are acutely aware of the negative impacts of technology
    - 44% noting that technology is having a negative impact on family life in the home (i.e. people spending too much time on different devices)
    - 2 in 3 (67%) worry that children's ability to communicate in person has been stunted due to technology
    - Half of us are checking emails, texts, social media first thing in the morning (50%) or last thing at night (47%).
    - Perhaps worryingly, one quarter (24%) of us are using apps to help meditate/relax/disconnect from the world.

11) Data privacy growing in importance
    - Two thirds are concerned about how organisations are using our data

12) Influencers / internet celebrities are important (especially for Gen Z)
    - 1 in 5 (22%) buy products endorsed by influencers – 45% among Gen Z.

13) 81% of population now purchase online (increase of 6 percentage points on 2022)
    - Flights, hotels, clothing, electronics are driving growth
    - 15% grocery shop online, driven by middle class Dubliners.
    - Half (50%) of us research products on our mobiles while in store.

Massive change: Key 5-year comparisons between 2018 - 2023

Internet access

85% accessed the internet at least once a day in 2023 - up from 80% in 2018

Silent Generation growth 11% ('18) to 36% ('23) – COVID likely a catalyst.

Smart devices

6 in 2018; *10 GenZ*

8 in 2023; *10 GenZ*

Steady progress in this area generally.

Gen Z remaining the same with some increases in the intermediate years, though settling back at 10.

Smartphones

Smartphones saturating the market in recent years with 93% reporting having one in 2023, compared to 88% in 2018.

The most significant increase between these years is among those aged 65+, moving up from 44% in 2018 to 75% in 2023.

Increases in device usage

It is not only smartphones that have seen an uptick in usage.

Smart TVs:
38% in '18 to 79% in '23.

Wearable digital device (e.g FitBit):
7% in '18 to 35% in '23.

Laptops:
67% in '18 to 73% in '23.

Streaming Devices (e.g Chromecast:
15% in '18 to 30% in '23.

Increased usage of online services & entertainment

Netflix:
43% in 2018 to 76% in 2023.

Online banking:
56% in 2018 to 74% in 2023.

Purchase products/services online*:
57% vs 81% in 2023.

Increased usage of tech in communications

Instant messaging (e.g. WhatsApp):
48% in '18 to 79% in '23.

Instant calling (e.g WhatsApp):
37% in '18 to 69% in '23.

Personal email:
61% in '18 to 82% in '23

Work email:
27% in '18 to 45% in '23.

Changes in Social Media usage

Many increases:

WhatsApp:
55% in '18 to 78% in '23.

Instagram:
31% in '18 to 55% in '23.

LinkedIn:
15% in '18 to 25% in '23.

However, some have not budged:
Facebook:
67% in '18 to 66% in '23.

Difficulty disconnecting

This increased tech focus is leading to growth in difficulties disconnecting however.

37% in 2023 noting they check SM/emails when having difficulty sleeping vs 30% in 2018.

30% note they check work emails when on holidays vs 24% in 2018.

Worry about data privacy

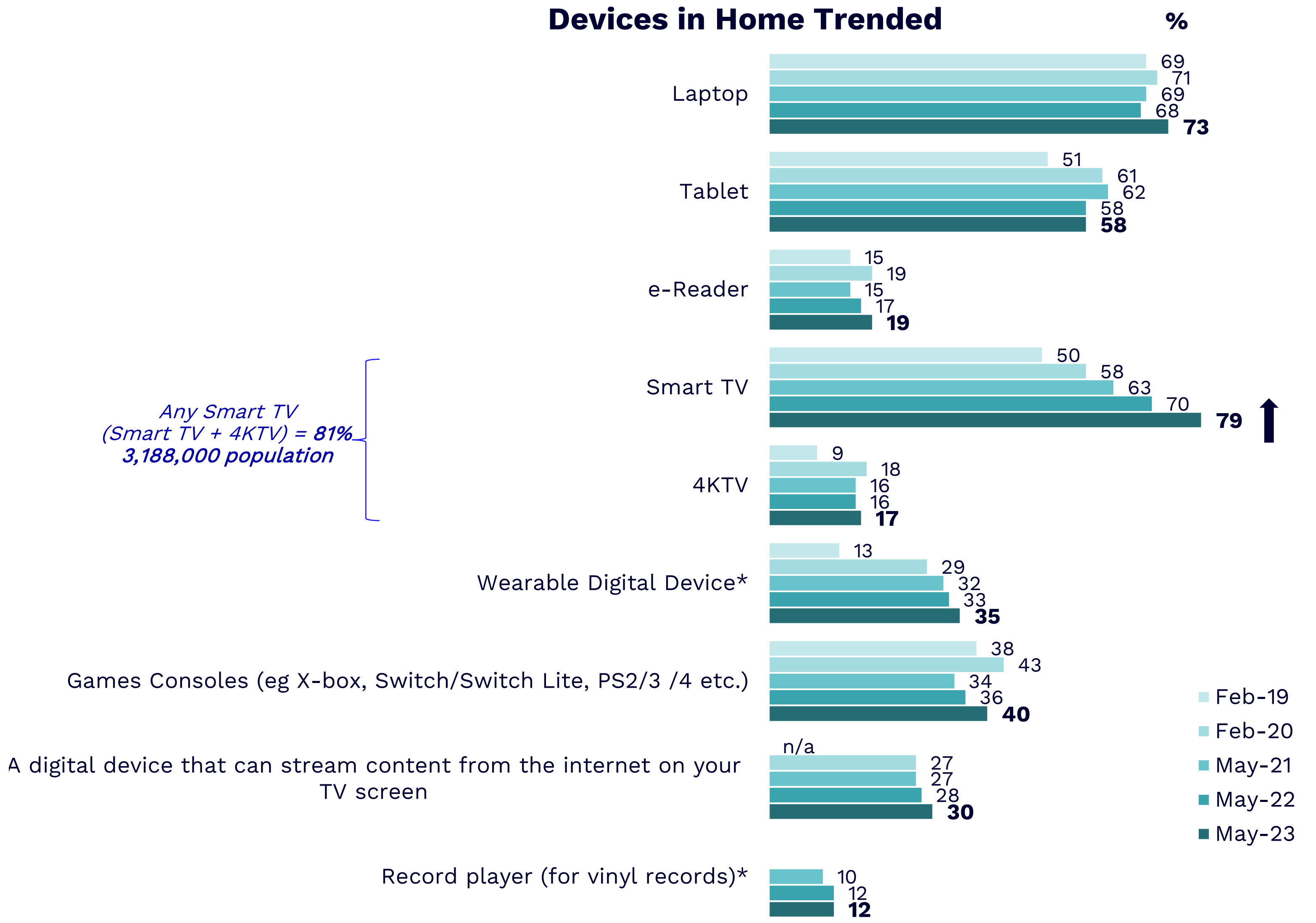
47% in 2018 worried about data privacy online while 54% worried in 2023.

Tech gear – The move toward a ‘smart home’ continues

Delve Deeper

A pretty stable picture over the past years, with ownership of Smart TVs the main growth area

Base: All adults aged 16+ - 1,003



Any Smart TV (Smart TV + 4KTV) = 81% 3,188,000 population

**Added 2021*

Q.1 Which of the following devices do you currently use? It does not matter who owns them in the household

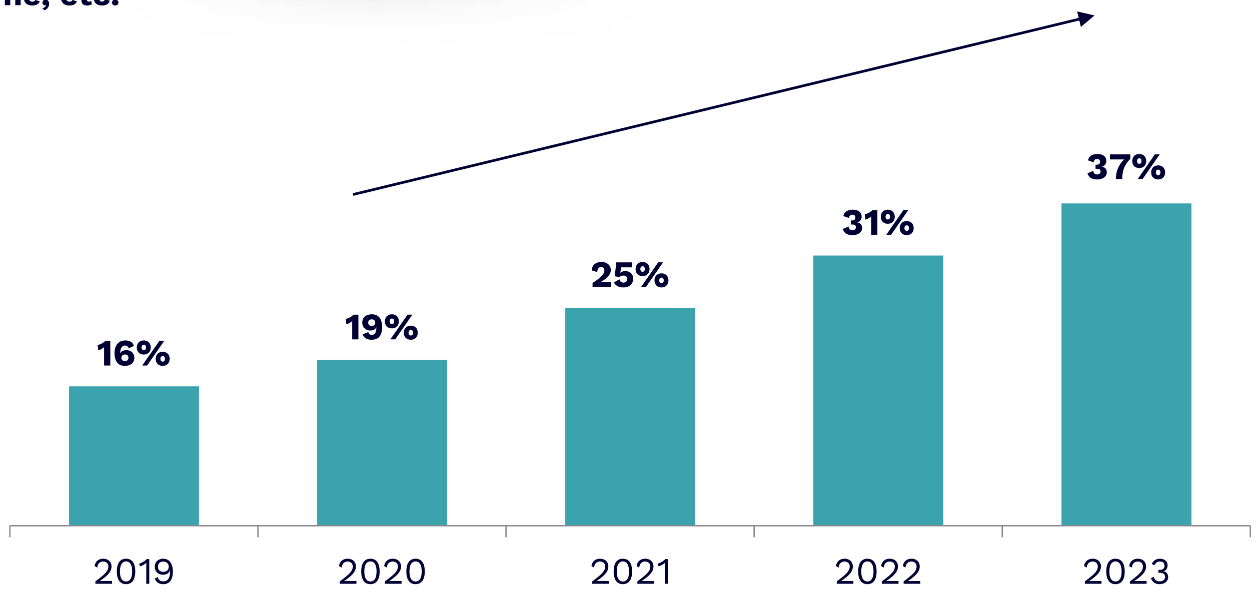
2023 Totals

Smart TV	79%
Laptop	73%
Tablet	58%
Games console	40%
Wearable	35%
Streaming device	30%
eReader	19%
4KTV	17%
Record player	12%

Ownership of smart home hubs continues to increase

37%

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



Ownership of smart hubs peaks amongst Millennials, with a fall in usage among Gen Z (the only generation showing lower usage from 2022).

Generations

		± vs 2022
Gen Z	43%	-6%
Millennials	48%	+8%
Gen X	41%	+4%
Baby Boomers	23%	+6%
Silent Gen	8%	+5%

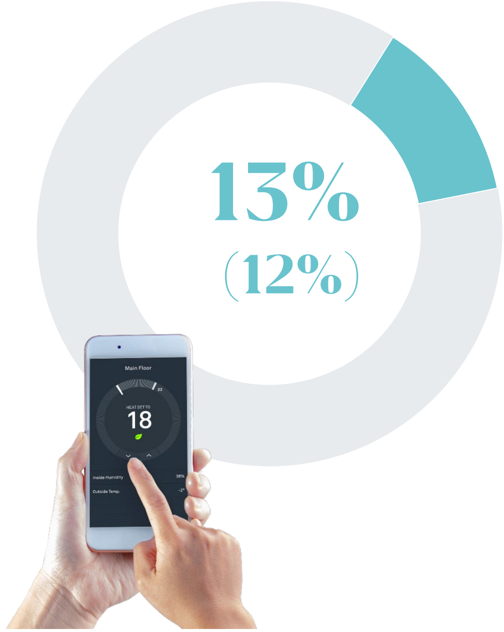
○ = Significantly higher ☐ = Significantly lower

? Q.1 Which of the following devices do you currently use? It does not matter who owns them in the household

Other tech in the home such as smart heating have remained relatively steady

VPN/Proxy server

Smart home heat devices (e.g. Climate, Hive, Nest etc.)



Older generations continue to show lower usage.

Generations	VPN/ Proxy Server	Smart home heats Devices (e.g. Hive/Nest)
Gen Z	○ 17%	13%
Millennials	12%	17%
Gen X	11%	16%
Baby Boomers	□ 4%	□ 7%
Silent Gen	6%	□ 6%

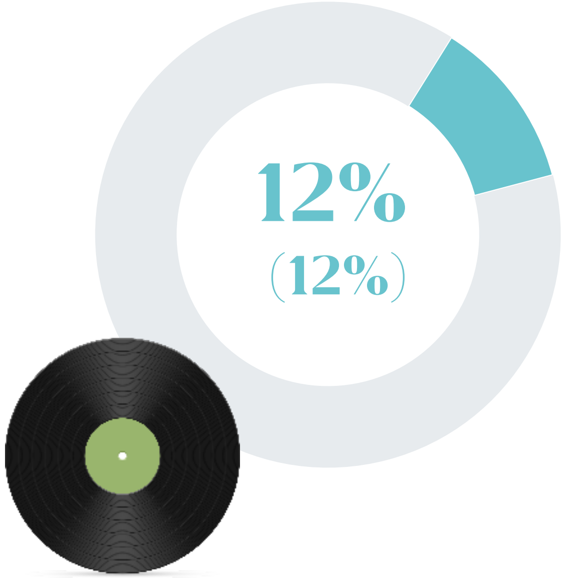
○ = Significantly higher □ = Significantly lower

()=2022 data

Usage of 'retro' devices remains steady

Basic Mobile Phone

Vinyl Records



Millennials showing that reliance on more modern tech, while Gen Z interestingly showing higher usage than their older millennial counterparts.

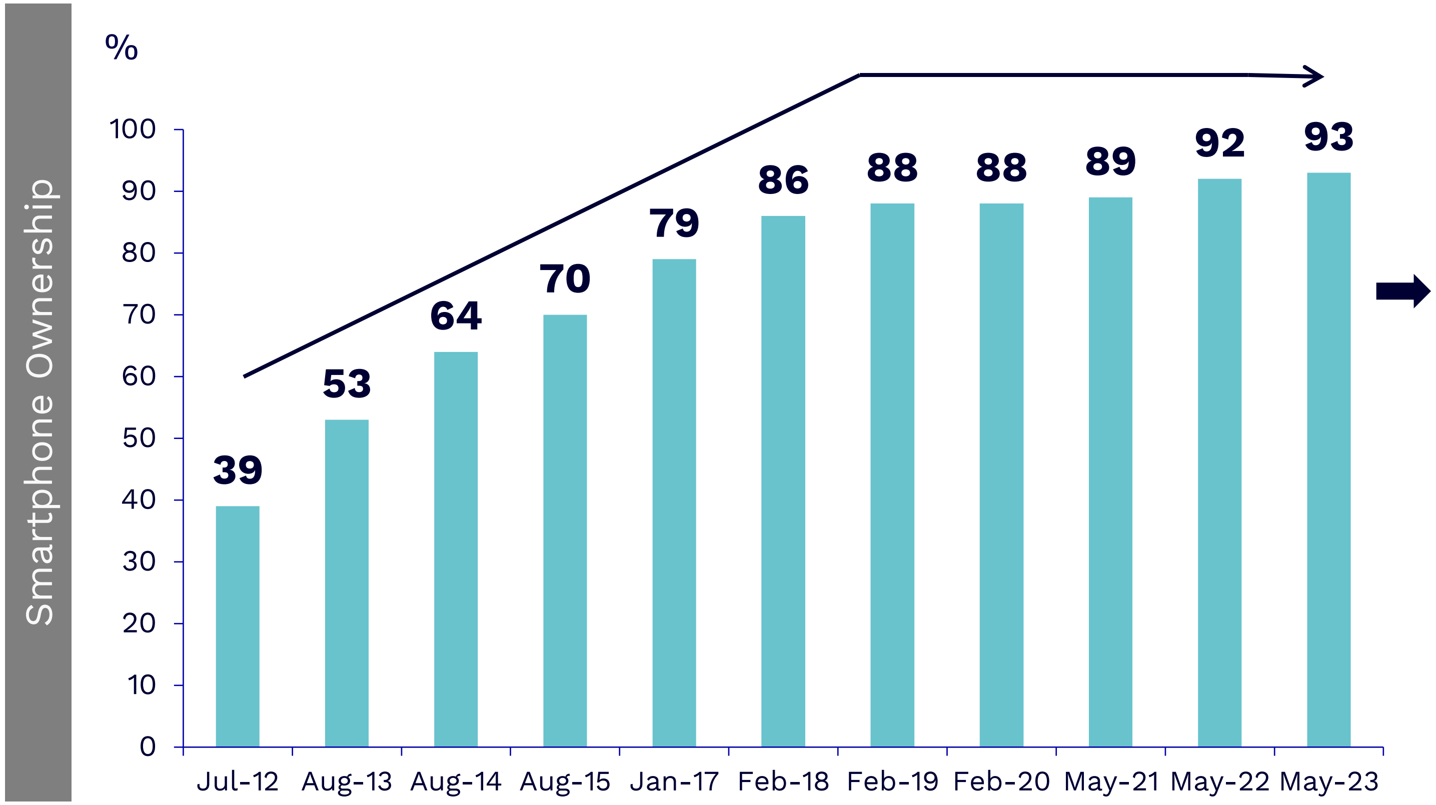
()=2022 data

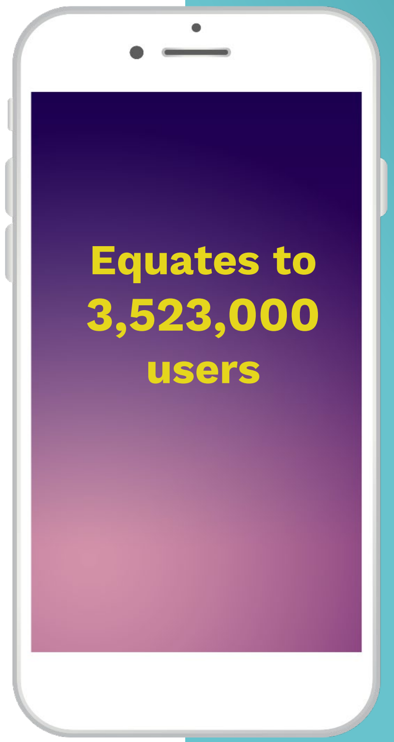
Generations	Basic Mobile Phone	Vinyl Records
Gen Z	17%	11%
Millennials	11%	8%
Gen X	16%	14%
Baby Boomers	29%	17%
Silent Gen	45%	13%

○ = Significantly higher ☐ = Significantly lower

9 in 10 mobile phone users have a smart phone

Base: All respondents with mobiles – 960





Equates to 3,523,000 users

Generations

Gen Z	○ 100%
Millennials	○ 99%
Gen X	○ 96%
Baby Boomers	□ 83%
Silent Gen	□ 60%

○ = Significantly higher □ = Significantly lower

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

? Q.1 Which of the following devices do you currently use? It does not matter who owns them in the household

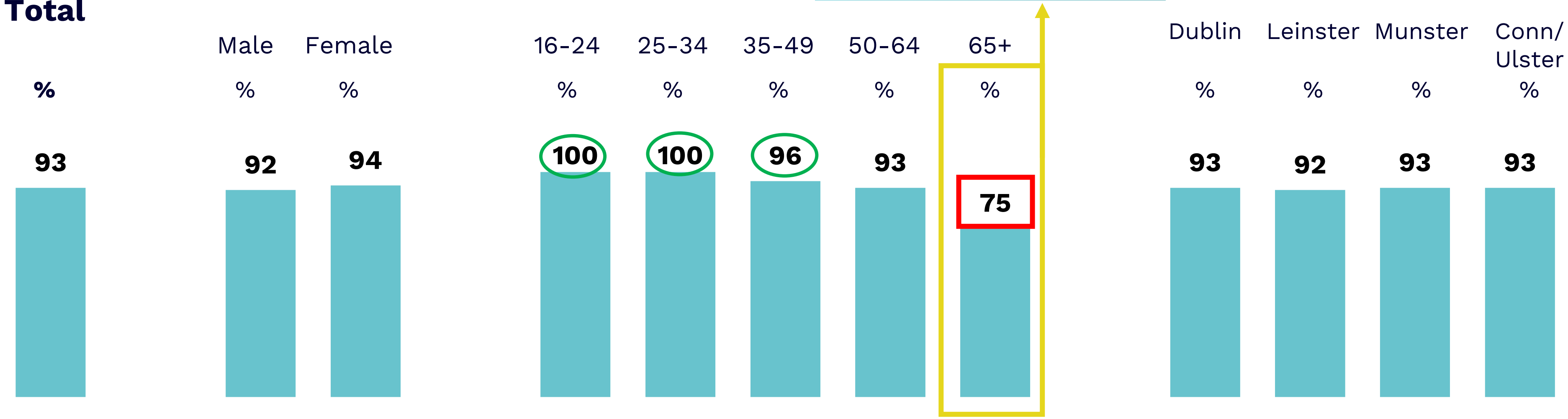
Smartphone ownership among the over 50-64 age group is increasing

Base: All respondents with mobiles – 960

Smartphone usage among the 65+ age group is continuing to grow.

○ = Significantly higher

☐ = Significantly lower



	Total	Male	Female	16-24	25-34	35-49	50-64	65+	Dublin	Leinster	Munster	Conn/ Ulster
% May ‘ 22	**92**	**91**	**93**	**100**	**100**	**98**	**92**	**67**	**95**	**93**	**92**	**86**
% May ‘ 21	89	89	89	100	99	98	86	57	91	91	86	86
% May ‘20	88	87	89	99	98	96	84	59	91	88	85	89
% Feb ‘19	88	87	89	98	100	98	82	54	91	90	87	85
% Feb ’18*	86	86	87	100	98	97	83	44	90	88	81	81
% Jan ‘17	79	79	79	95	92	91	66	32	89	75	78	72
% Aug ’15	70	70	70	91	89	81	51	21	76	68	69	63
% Aug ‘14	64	66	64	85	84	74	43	18	75	66	57	57

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

Equal ownership rates seen across regions, with significant increase in Conn/Ulster.

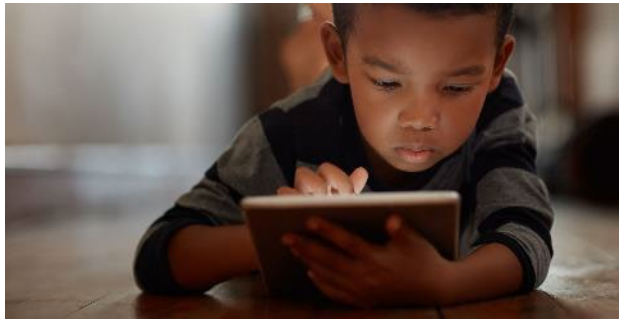
? Q.1 Which of the following devices do you currently use? It does not matter who owns them in the household

Number of smart devices in the house has levelled off, with usage continuing to be driven by households with pre-teens and teens

Families with teenagers have an average of

11-12 SMART*

devices at home



Families with pre-teens have an average of

11-12 SMART*

devices at home

Teen Family Pop.
2021 Average = 9
2022 Average = 10
2023 Average = 12

Total Pop.
2020 Average = 7
2021 Average = 7
2022 Average = 8
2023 Average = 8

Pre Teen Family Pop.
2021 Average = 10
2022 Average = 10
2023 Average = 11

*Defined as smart device (e.g. Smart TV, wearable, laptop, etc.)

Generations
(Average No.)

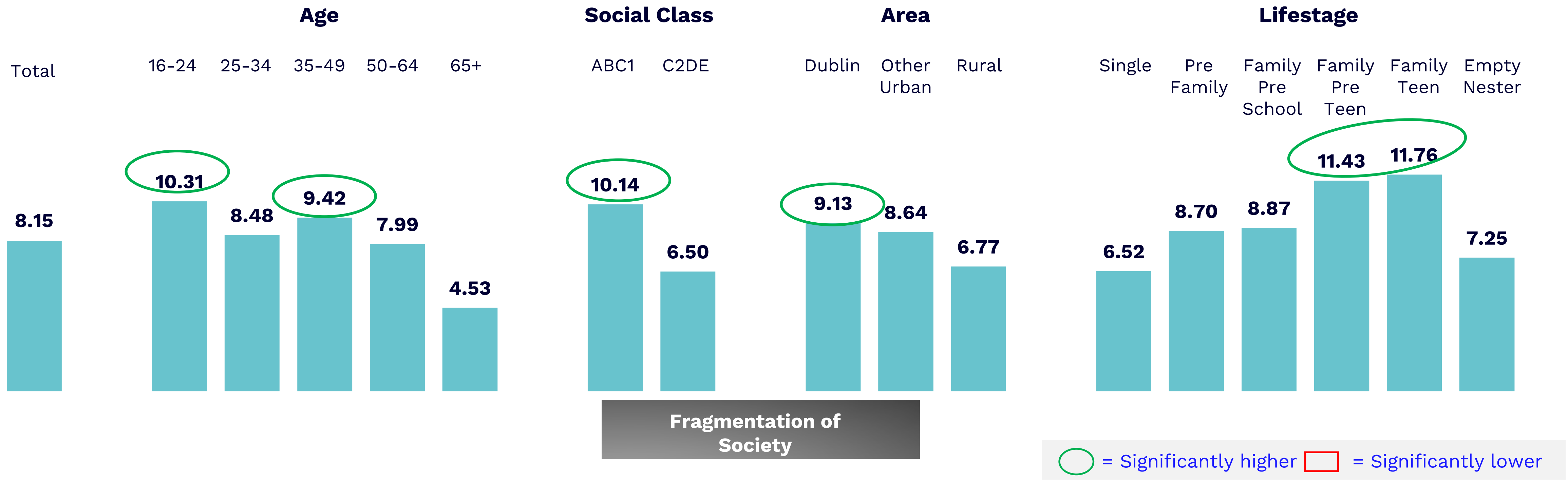
		± vs 2022
Gen Z	10	-2
Millennials	9	-
Gen X	9	-1
Baby Boomers	6	+1
Silent Gen	4	+2

○ = Significantly higher □ = Significantly lower

On average, Irish homes have access to 8 smart devices* at home

B&A

May 2023

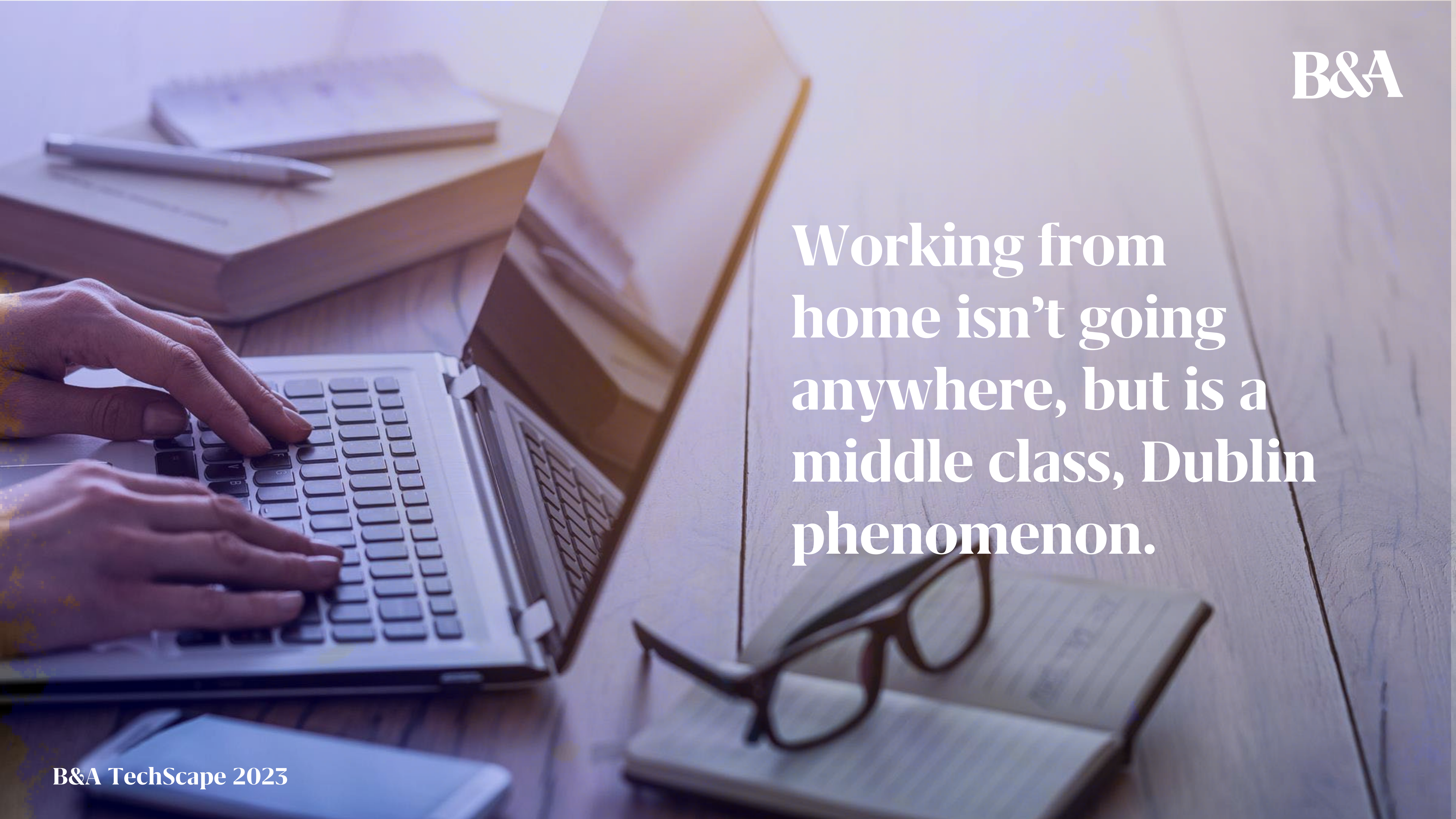


Fragmentation of Society

Clear fragmentation in society re tech usage – more usage among white collar, younger, Dublin cohorts.

? Q.2 And how many …SMART DEVICES are in the household?

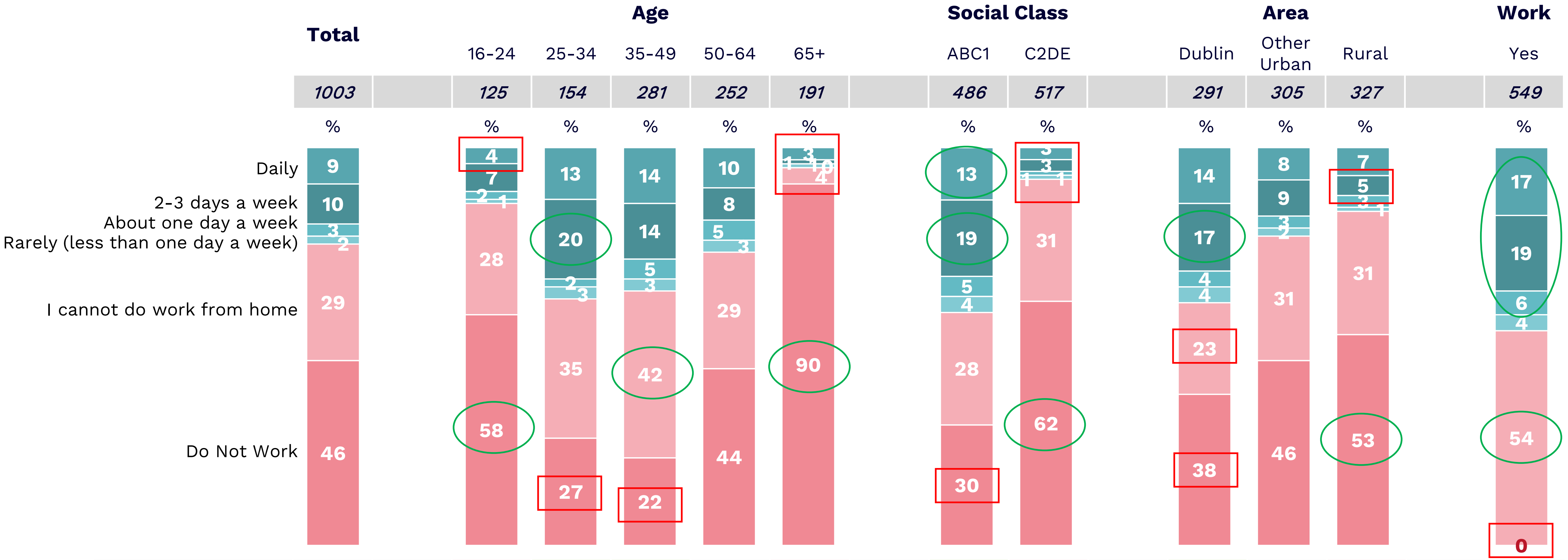
*Smart devices definition: Laptop/iPad, eReader, Smartphone, wearable devices, etc.



Working from home isn't going anywhere, but is a middle class, Dublin phenomenon.

Working from home isn't going anywhere, but it is mostly middle class and Dublin centric

Base: All respondents 1,000



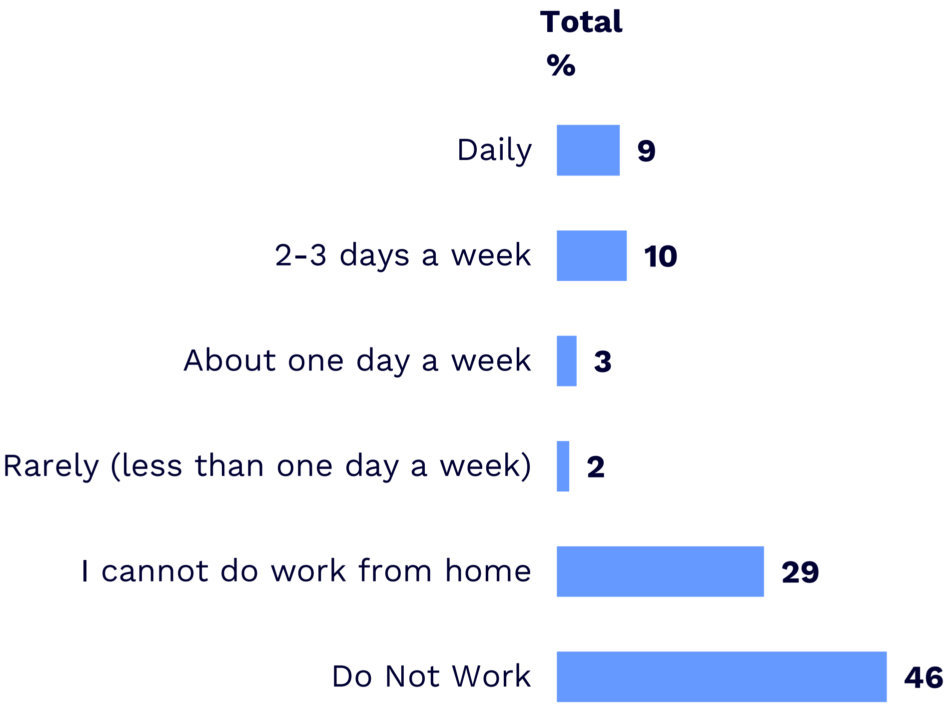
	Total	16-24	25-34	35-49	50-64	65+	ABC1	C2DE	Dublin	Other Urban	Rural	Yes
Any working from home	25	14	38	35	27	5	42	8	38	22	16	46
Any working 2+ days from home	19	11	33	27	18	4	33	6	31	18	12	36

○ = Significantly higher ☐ = Significantly lower

Q.15 At the moment how often, if at all, do you work from home during the working week?

This class and regional divide is further exasperated when focusing on the frequency of working from home – middle class, Dubliners more likely to WFH more often

Base: All respondents 1,000



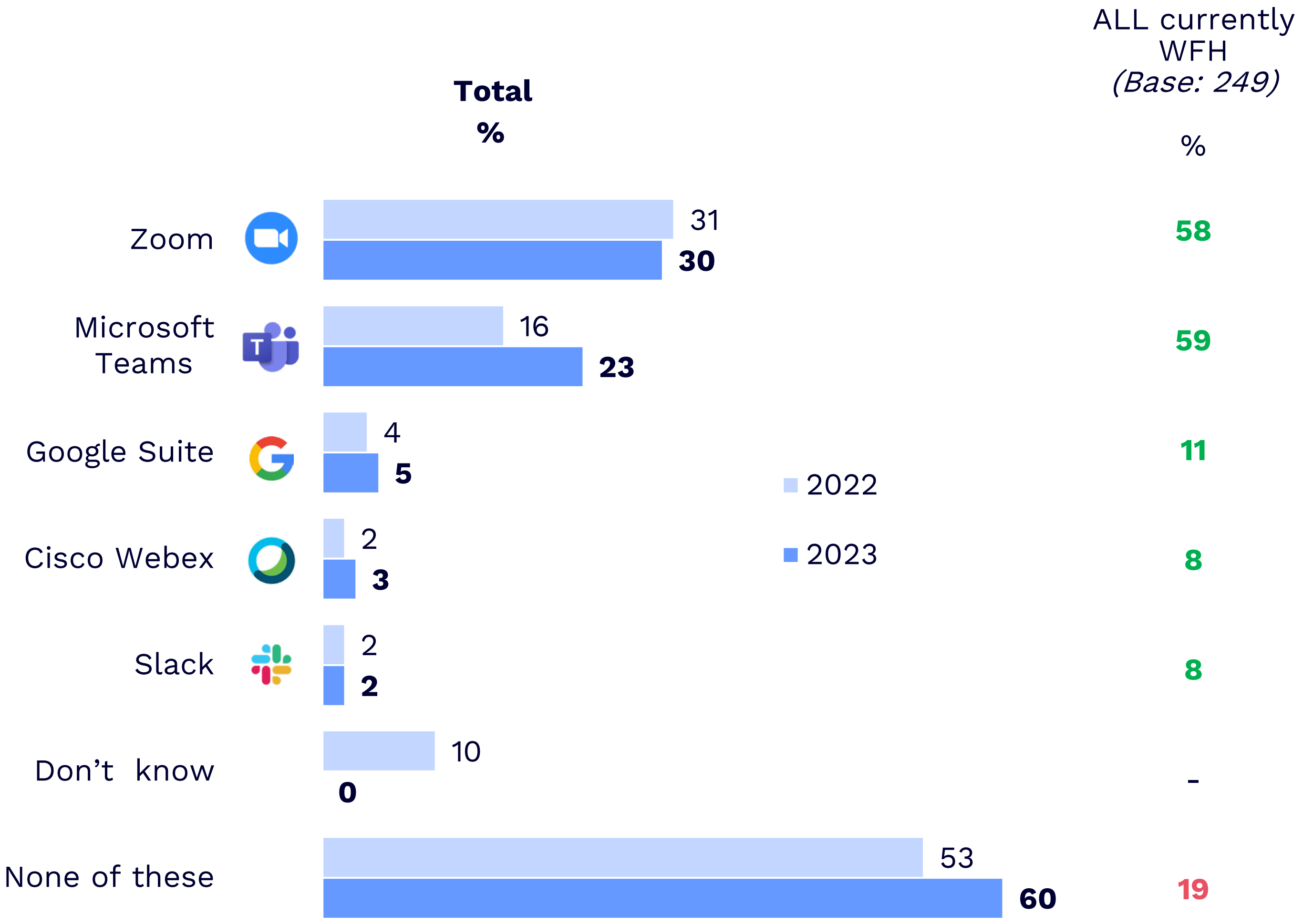
	Total	**Age**					**Social Class**		**Area**		
		16-24	**25-34**	**35-49**	**50-64**	**65+**	**ABC1**	**C2DE**	**Dublin**	**Other Urban**	**Rural**
		128	*145*	*264*	*243*	*220*	*539*	*423*	*284*	*377*	*339*
	%	%	%	%	%	%	%	%	%	%	%
Daily	**9**	**4**	13	14	10	**3**	**13**	**3**	14	8	7
2-3 days a week	**10**	7	**20**	14	8	**1**	**19**	**3**	**17**	9	**5**
About one day a week	**3**	2	2	5	5	**0**	5	**1**	4	3	3
Rarely (less than one day a week)	**2**	1	3	3	3	**1**	4	**1**	4	2	1
I cannot do work from home	**29**	28	35	**42**	29	**4**	28	31	**23**	31	31
Do Not Work	**46**	**58**	**27**	**22**	44	**90**	**30**	**62**	**38**	46	**53**

🟩 = Significantly higher 🟥 = Significantly lower

Q.15 At the moment how often, if at all, do you work from home during the working week?

Microsoft Teams has seen an increase is usage, narrowing the gap to Zoom – note the growth in those not using any video comms

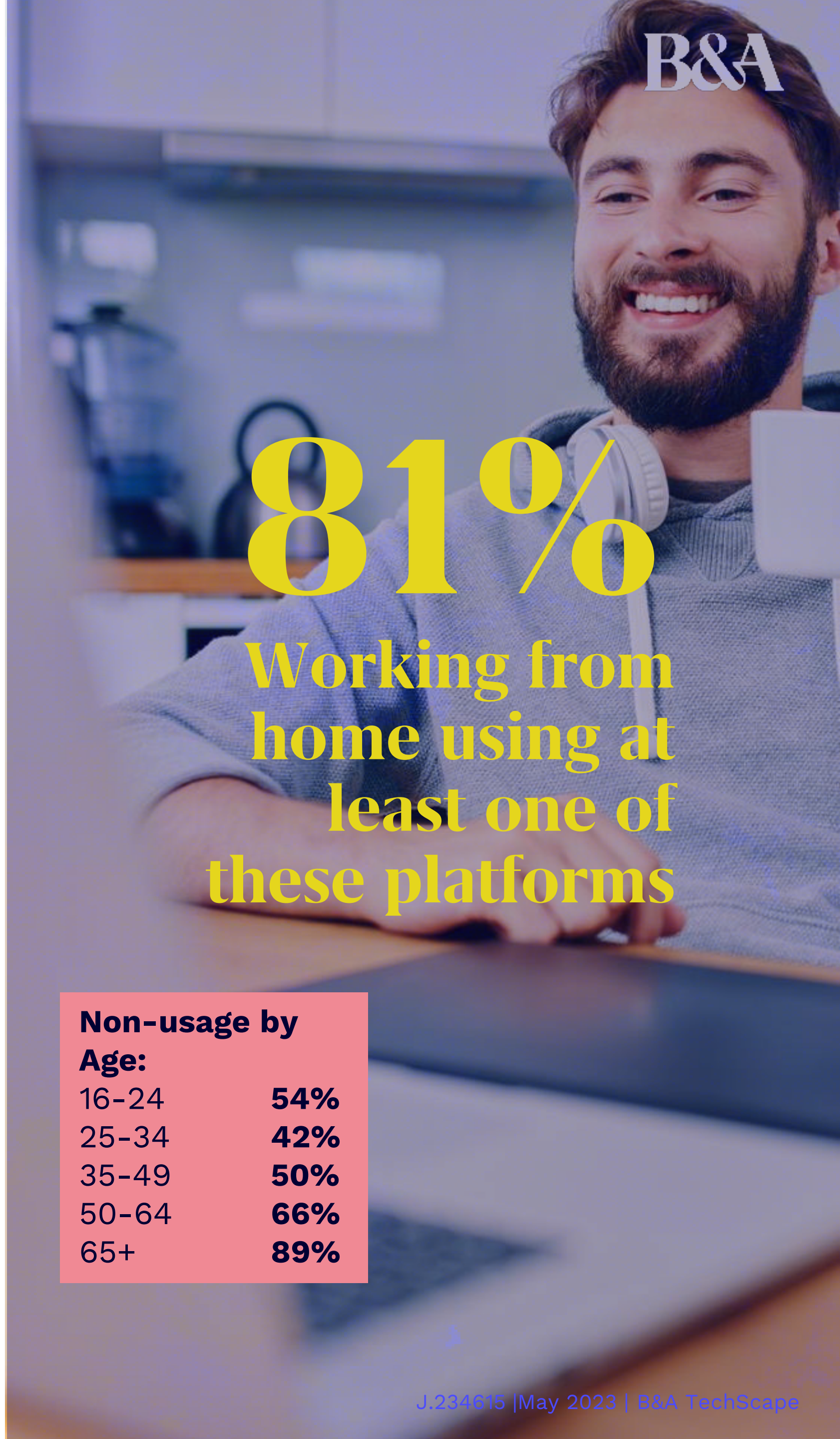
Base: All respondents 1,000



Any of these 40%

🟩 = Significantly higher 🟥 = Significantly lower

Q.16 What platforms are you using nowadays?



81%

Working from home using at least one of these platforms

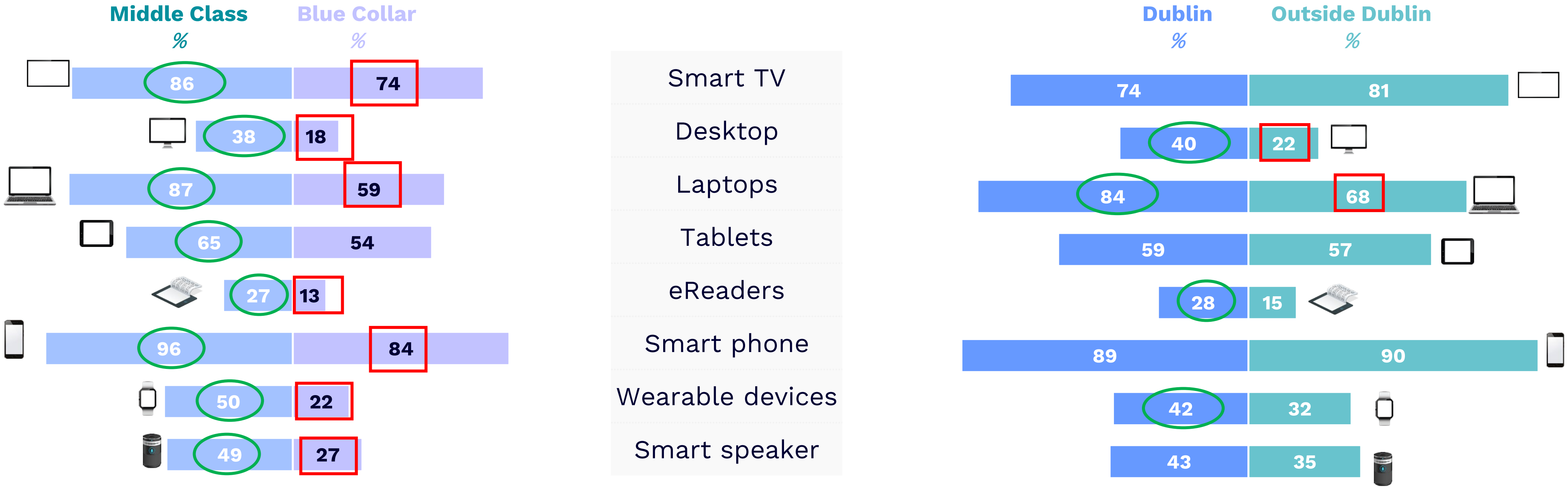
Non-usage by Age:

16-24	**54%**
25-34	**42%**
35-49	**50%**
50-64	**66%**
65+	**89%**

The socio-economic tech divide persists, but signs regional divide is lessening

A socio-economic tech divide continues to permeate Irish society, but signs regional divide is lessening:

Middle class (ABC1) Vs Blue Collar (C2DE) and Dublin Vs Outside



Clear divide on social class: number of smart devices in house

- ABC1 10 devices
- C2DE 7 devices

C2DE also **less likely to use** online entertainment and communication services.

For example the gap: Netflix (-15%pts), Catchup TV (-13%pts), stream music (-27%pts), online banking (-20%pts), podcasts (-27%pts).

Less likely to use social media sites (-15%pts) & buy online: 74% C2DE vs 89% ABC1. However, the gap is closing here (52% C2DE vs 73% ABC1 in 2022)

Outside Dublin catching up in terms of smart devices

- Dublin 9 devices
- Outside 8 devices

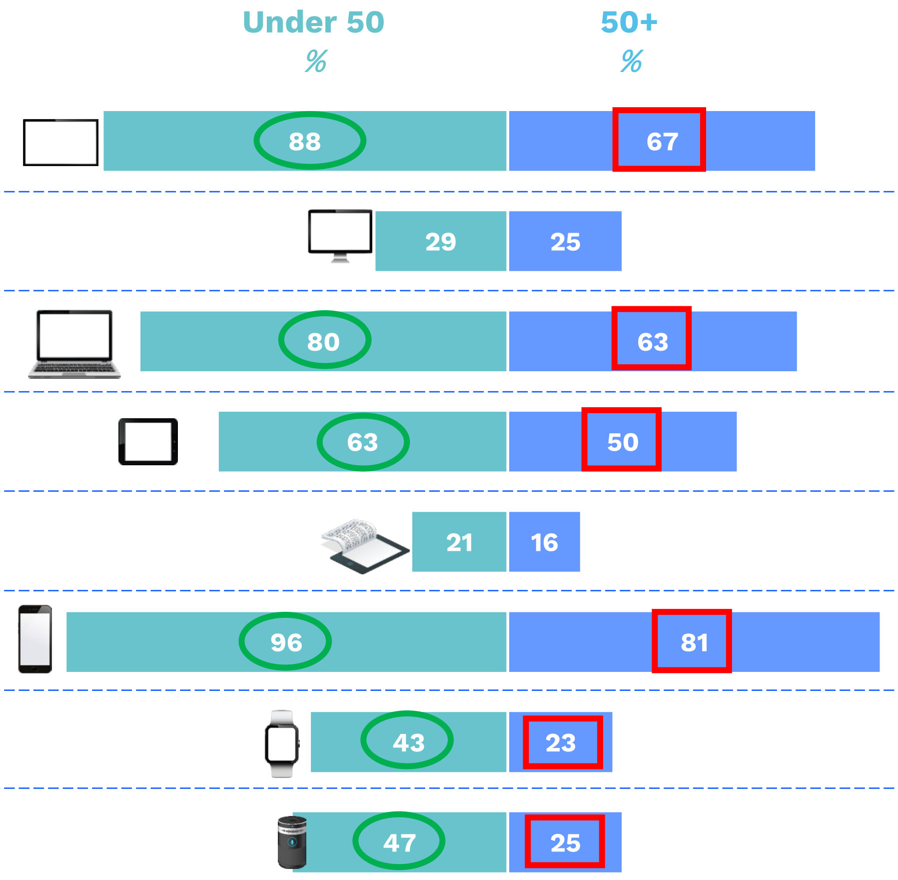
When focusing on specific devices, those in Dublin show higher usage in only 4 areas (work email, WhatsApp / Viber calling, cloud applications, and digital financial products.
Those living in **Dublin are more likely to agree** that “BB is more important than TV” vs Non-Dubliners

○ = Significantly higher ☐ = Significantly lower

A generational divide still very much at play

Aged under 50 Vs Aged 50+ and Generations comparison

○ = Significantly higher 🟥 = Significantly lower



	Gen Z %	Millennials %	Gen X %	Baby Boomers %	Silent Gen %
Smart TV	90	85	86	63	49
Desktop	32	26	31	23	16
Laptops	82	79	78	60	38
Tablets	59	64	61	50	33
eReaders	19	21	20	15	13
Smart phone	97	97	94	77	53
Wearable devices	42	45	35	21	9
Smart speaker	43	48	41	23	8

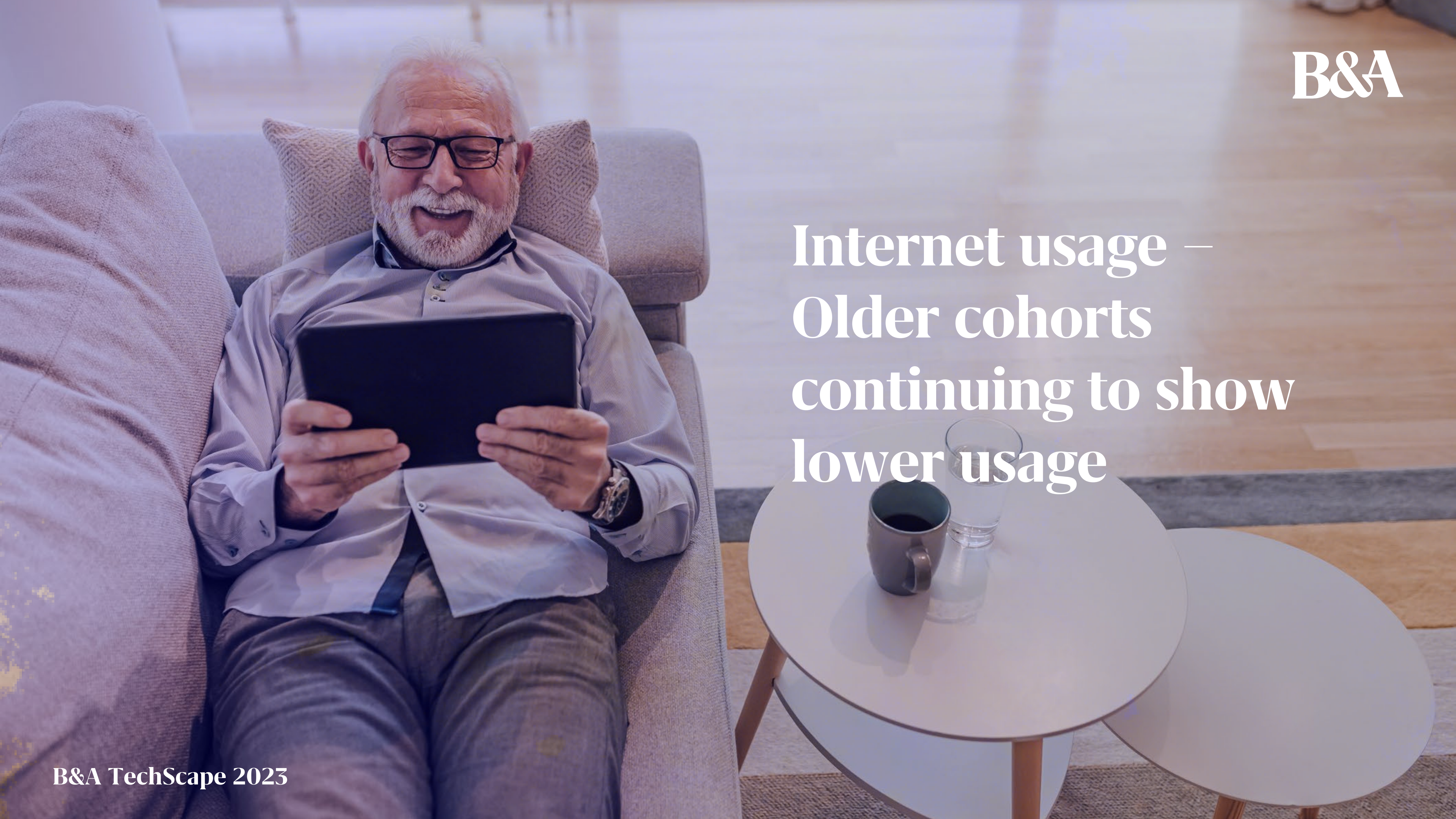
Clear divide on age brackets: number of smart devices in house

- Under 50 9 devices
- 50+ 6 devices

Clear divide between generations: number of smart devices in house

- Gen Z 10 devices
- Millennials 9 devices
- Gen X 9 devices
- Baby Boomers 6 devices
- Silent Gen 4 devices

Some signs that Gen Z are slowing down however (-2 average smart devices)



B&A

Internet usage – Older cohorts continuing to show lower usage

Internet usage continuing to creep up, albeit only marginal compared to previous years

Increase in YOY daily internet usage as

(84%) **85%**

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

(41%) **42%**

of those 74 yrs+ (Silent Gen) now access the internet once a day or more often – the only generation showing an increase in daily usage

()=2022 data

8% of population never access the internet

Generations

		± vs 2022
Gen Z	98%	-1%
Millennials	97%	-1%
Gen X	91%	-2%
Baby Boomers	64%	-5%
Silent Gen	36%	-5%

Daily internet usage has declined (albeit by the slightest of margins and is still much higher than pre-covid) amongst the 65+ age group at 51%, but there has also been a reduction in those never online (33% in 2022 to 31%).

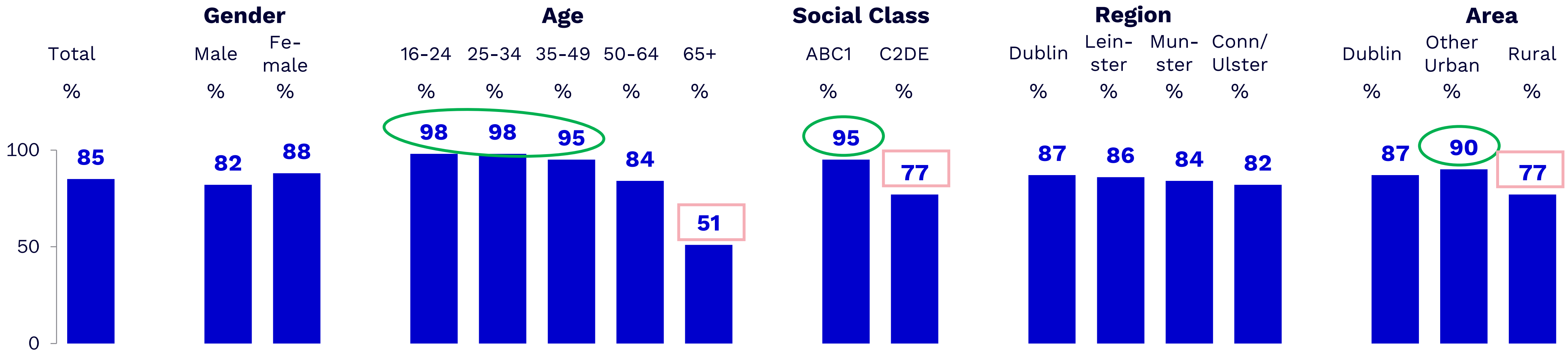
○ = Significantly higher ☐ = Significantly lower

85% of us access the internet once a day or more often, with a widening divide between middle and working class cohorts

Base: all Adults 16+ - 1,000

○ = Significantly higher
□ = Significantly lower

% Accessing the internet at least once a day



	Total %	Male %	Female %	16-24 %	25-34 %	35-49 %	50-64 %	65+ %	ABC1 %	C2DE %	Dublin %	Leinster %	Munster %	Conn/Ulster %	Dublin %	Other Urban %	Rural %
May ‘22	**84**	**84**	**85**	**99**	**97**	**95**	**80**	**52**	**92**	**78**	**90**	**85**	**80**	**82**	**90**	**84**	**81**
May ‘21	80	78	82	99	95	92	73	43	92	72	88	85	71	75	88	75	78
Mar ‘20	81	79	83	98	95	94	73	39	91	73	85	80	78	78	85	77	80
Feb ‘19	75	73	76	88	97	87	67	31	82	70	78	78	69	73	78	76	74
Feb ‘18	80	77	76	98	95	91	62	30	92	69	92	75	74	69	89	80	73
Jan ’17	79	79	78	100	95	91	62	30	92	69	92	75	74	69	84		70
*Aug ’15	75	76	74	96	93	86	54	33	84	67	81	78	75	66	82		65

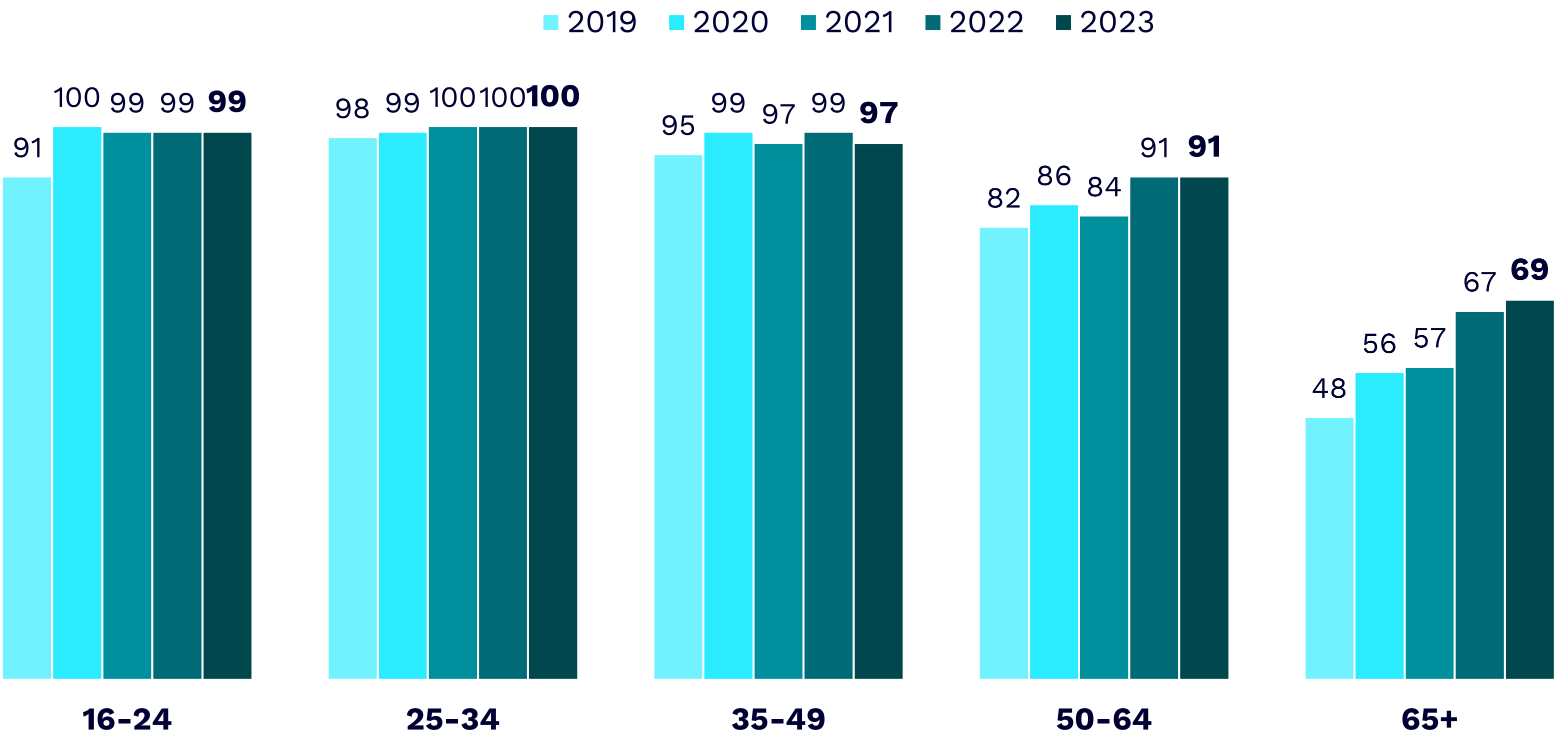
Daily internet usage has declined (albeit by the slightest of margins and is still much higher than pre-covid) amongst the 65+ age group at 51%, but there has also been a reduction in those never online (31%).

? Q.4 How often do you yourself access the internet nowadays?

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

% Ever use the internet by age bands over time

Base: all Adults 16+ - 1,000



2023 sees a continued grow in usage among over 65s (albeit not as significant as seen in 2022), with 7 in 10 over 65s now using the internet to some extent.

Q.4 How often do you yourself access the internet nowadays?

Usage of and feelings toward Chat GPT & AI

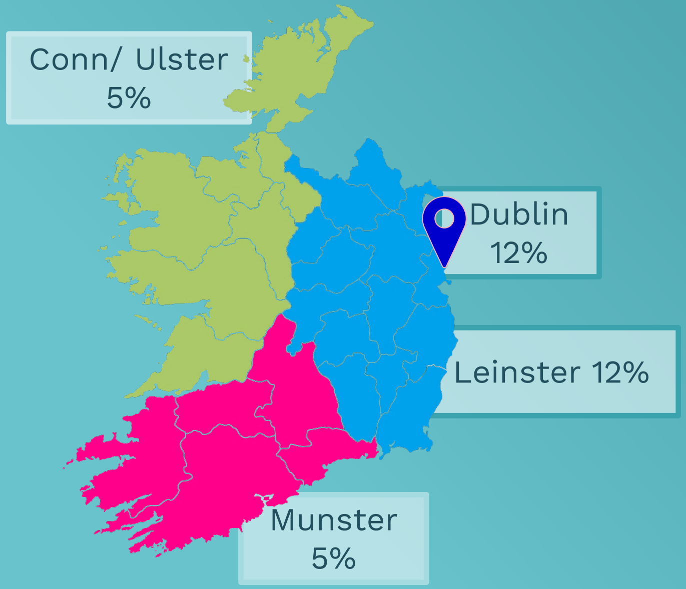
Chat GPT Trialling

9%

of pop.

(almost 355,000 consumers)
now use Chat GPT in Ireland
Driven by **middle class , Dubliners, Gen Z,** and **Millennials**

Region



Generations

Gen Z	15%
Millennials	13%
Gen X	8%
Baby Boomers	2%
Silent Gen	-

Social class

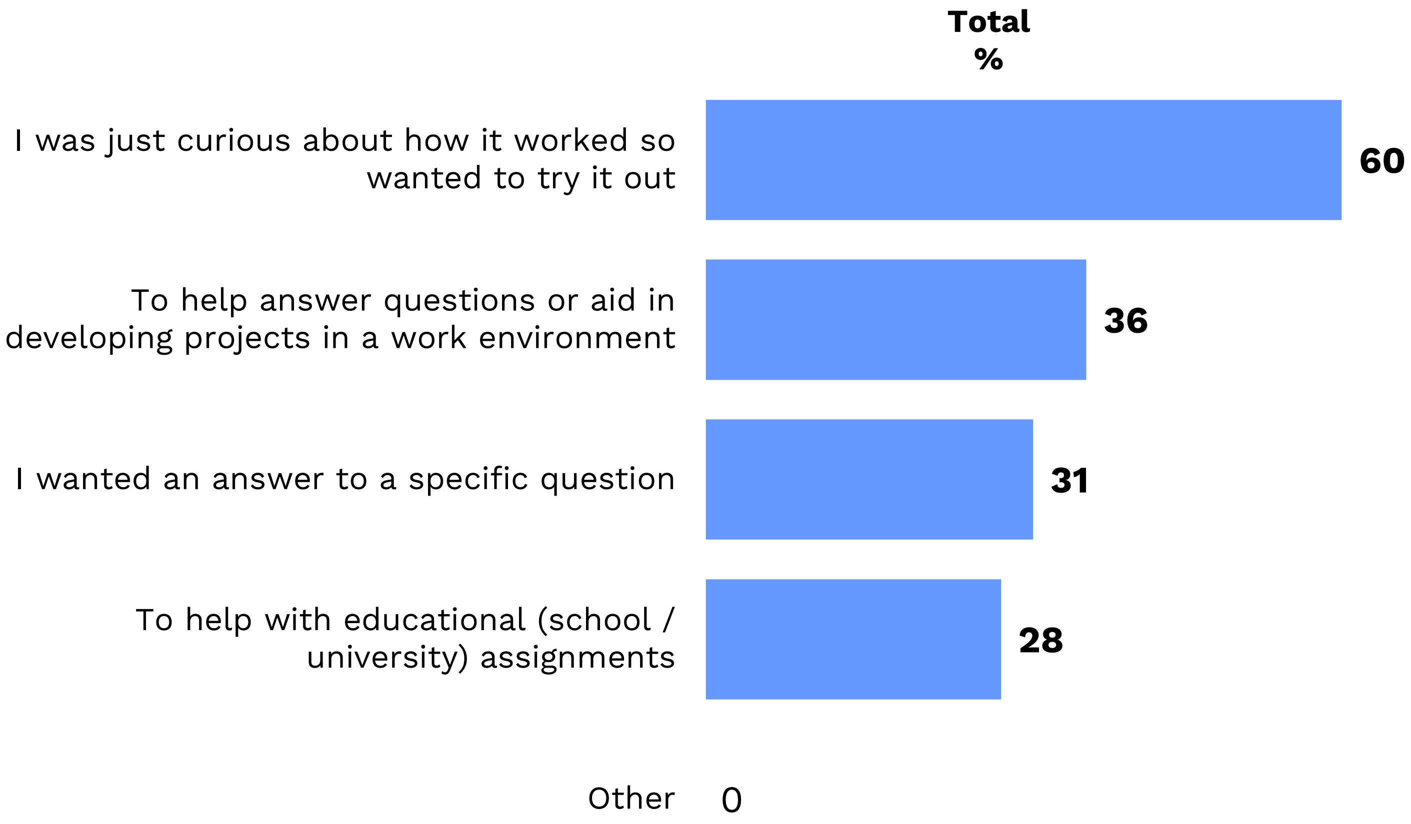
ABC1	C2DE
15%	4%

○ = Significantly higher ☐ = Significantly lower

? Q.3 Which of these do you do nowadays anywhere ...Use Chat GPT

Reasons to Use Chat GPT

Base: All adults 16+ who use Chat GPT - 89



	Total %
I was just curious about how it worked so wanted to try it out	60
To help answer questions or aid in developing projects in a work environment	36
I wanted an answer to a specific question	31
To help with educational (school / university) assignments	28
Other	0

B&A

52%

Any task oriented

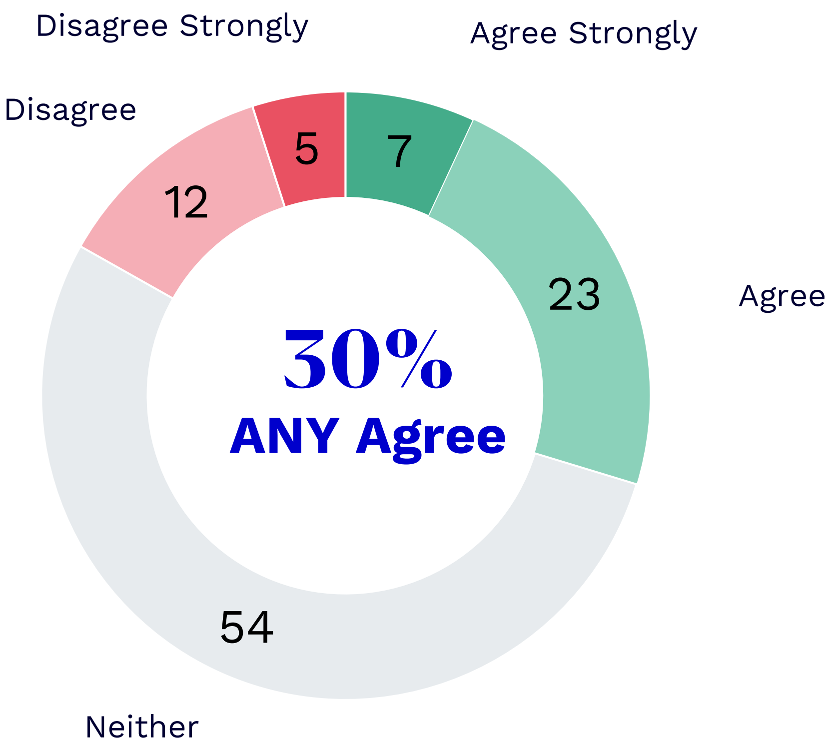
Among those using **Chat GPT**, curiosity is the main driver of usage, however over a third are using in a work context, with an additional 28% using in an educational setting.

Q4b From the list below, which, if any, were the reasons you have used Chat GPT?

Likelihood of Chat GPT replacing Google search

Base: All respondents – 1,000

Level of Agreement
%



Many are on the fence about the implications of Chat GPT (or they simply don't know), however a substantial minority believe it will replace Google (30%).

ANY Agree

Region

Dublin	Outside Dublin
○ 23%	☐ 32%

Social class

ABC1	C2DE
○ 36%	☐ 23%

Generations

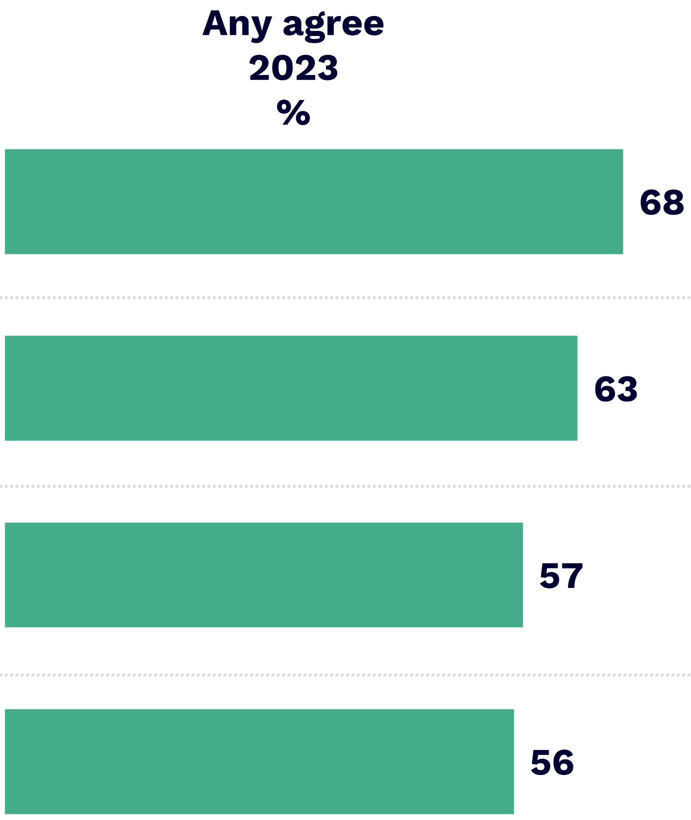
Gen Z	○ 43%
Millennials	35%
Gen X	31%
Baby Boomers	☐ 17%
Silent Gen	☐ 9%

○ = Significantly higher ☐ = Significantly lower

Q4c To what extent do you agree or disagree with the following statement …I think that Chat GPT will replace Google Search

Clear concerns surrounding the use of AI, with Millennials and Gen X showing most concern

Base: All adults 16+ - 1,000



	Any agree 2023 %	Gen Z	Mille-nnials	Gen X	Baby Boomers	Silent Gen
		150	287	240	271	52
		%	%	%	%	%
I feel that AI tools need to be regulated	68	66	76	71	61	41
I am concerned about the growth in AI (Artificial Intelligence)	63	54	68	67	63	44
I fear that AI tools like ChatGPT will replace many peoples' jobs	57	50	65	56	55	42
I fear that AI tools like ChatGPT will hinder students' ability to learn in schools and universities	56	44	62	61	55	36

Generations

Significantly higher **Significantly lower**

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

Our love for all things streaming and online finance continues to grow (Comms & Entertainment)

Delve Deeper

Digital financial products have seen a significant increase this year, with more than 2 in 5 now using

44%

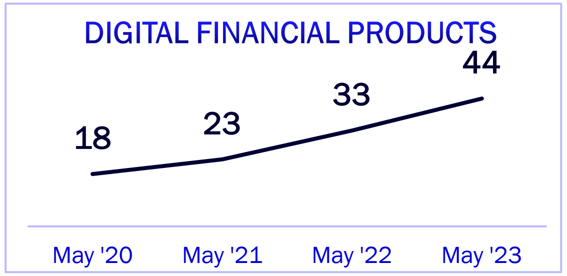
(33% in 2022)

of Pop.

(Just over 1,730,000 consumers) now use digital financial providers in Ireland

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

Driven by middle class and Dubliners



Region

Dublin	Outside Dublin
○ 52%	40%
(45%)	(28%)

Social class

ABC1	C2DE
○ 60%	□ 30%
(44%)	(23%)

Generations

Gen Z	○ 60%	(46%)
Millennials	○ 62%	(46%)
Gen X	41%	(37%)
Baby Boomers	□ 18%	(16%)
Silent Gen	□ 13%	(2%)

()=2022 data

○ = Significantly higher □ = Significantly lower

New payment methods are continuing to grow, particularly among younger generations and the middle class – location once again becoming less of a factor

B&A

Base: all Adults 16+ - 1,000

Ever do nowadays

Who is ever using?	
Under 50	57%
Over 50	26%
ABC1	57%
C2DE	32%
Dublin	48%
Outside Dublin	42%

44% (39% in 2022)

of all adults made a contactless mobile payment in store using a digital wallet (e.g., using a mobile phone, a smartwatch, etc., rather than using a physical bank card)

Who is dabbling?	
Under 35	19%
ABC1	14%
C2DE	6%

10% (6% in 2022)

owned/held, bought, or paid with cryptocurrency (e.g., Bitcoin, Ethereum, Litecoin, etc.)

○ = Significantly higher □ = Significantly lower

Q.3 Which of these do you do nowadays anywhere ...

Continuous growth in paid and other streaming, however the digital banking space sees the largest growth areas this year

B&A

Base: All adults 16+ - 1,000

Those with both Netflix & Amazon Prime = 77% (74%) (so Netflix is dominant with Amazon seen as an add on)

Entertainment

(73%) **76%**
Watch Netflix

(72%) **72%**
Watch or listen to content on YouTube

↑ (48%) **56%**
Stream music, via Spotify, YouTube, etc

(43%) **47%**
Use catch-up TV services like RTE Player, TV3 Player, All4, Virgin and Sky On Demand etc on mobile/laptop/TV or other devices

(39%) **40%**
Listen to Podcasts

(38%) **38%**
Watch Amazon Prime

↑ (29%) **35%**

(33%) **35%**
Watch or stream live sports or other events online

(27%) **27%**
*Watch an online streaming service such as Twitch, Mixer, YouTube Gaming

(16%) **20%**
Play Games online with others

(20%) **16%**
Watch/stream movies/shows etc. via sites such as Showbox, Putlocker , etc.

(13%) **14%**
Watch Apple TV

(-) **10%**
Watch Paramount+

78%
ANY Paid Streaming

Communications

The younger generation is driving growth in the digital finance space with significant increase in usage since 2022 (among Gen Z and Millennials). Gen Z also remains the key driver in paid Streaming TV (96%)

82% (79%)
Use personal email

76% (72%) ↑
use instant messaging - WhatsApp, Facebook Messenger, Snapchat, Viber, Discord, Skype etc.)

74% (69%) ↑
Online banking (e.g. your banking website app or login to their website)

69% (68%)
Call someone using WhatsApp, Viber, etc.

45% (42%)
Use video calling/conferencing (e.g. Zoom, Microsoft Teams, Skype or Facetime, Google Duo, etc.)

44% (33%) ↑
Digital financial products/banks such as Revolut, N26, Monzo

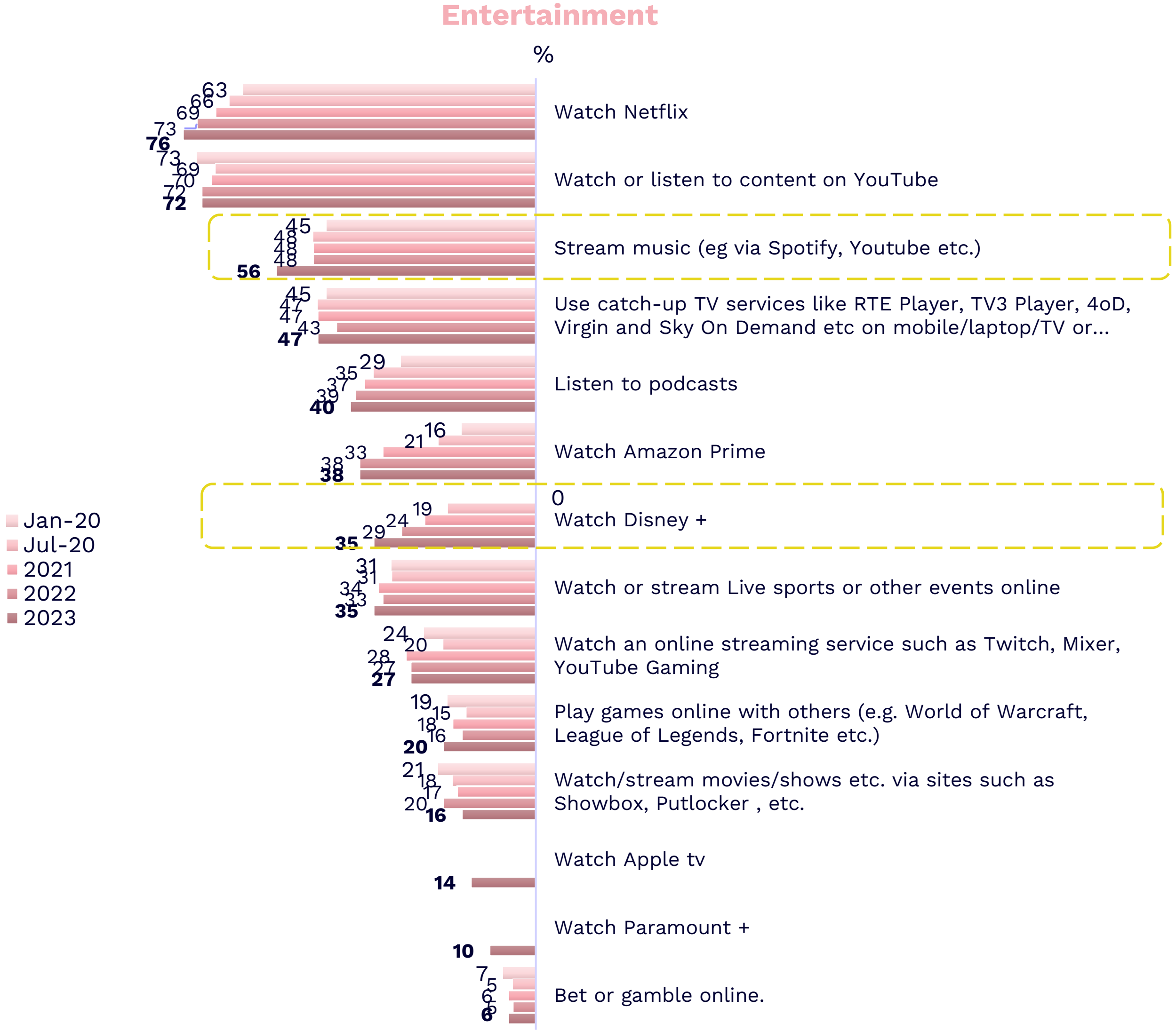
30% (30%)
Use cloud applications (e.g. WeTransfer, One Drive, Dropbox, iCloud, Google Drive, Evernote etc.)

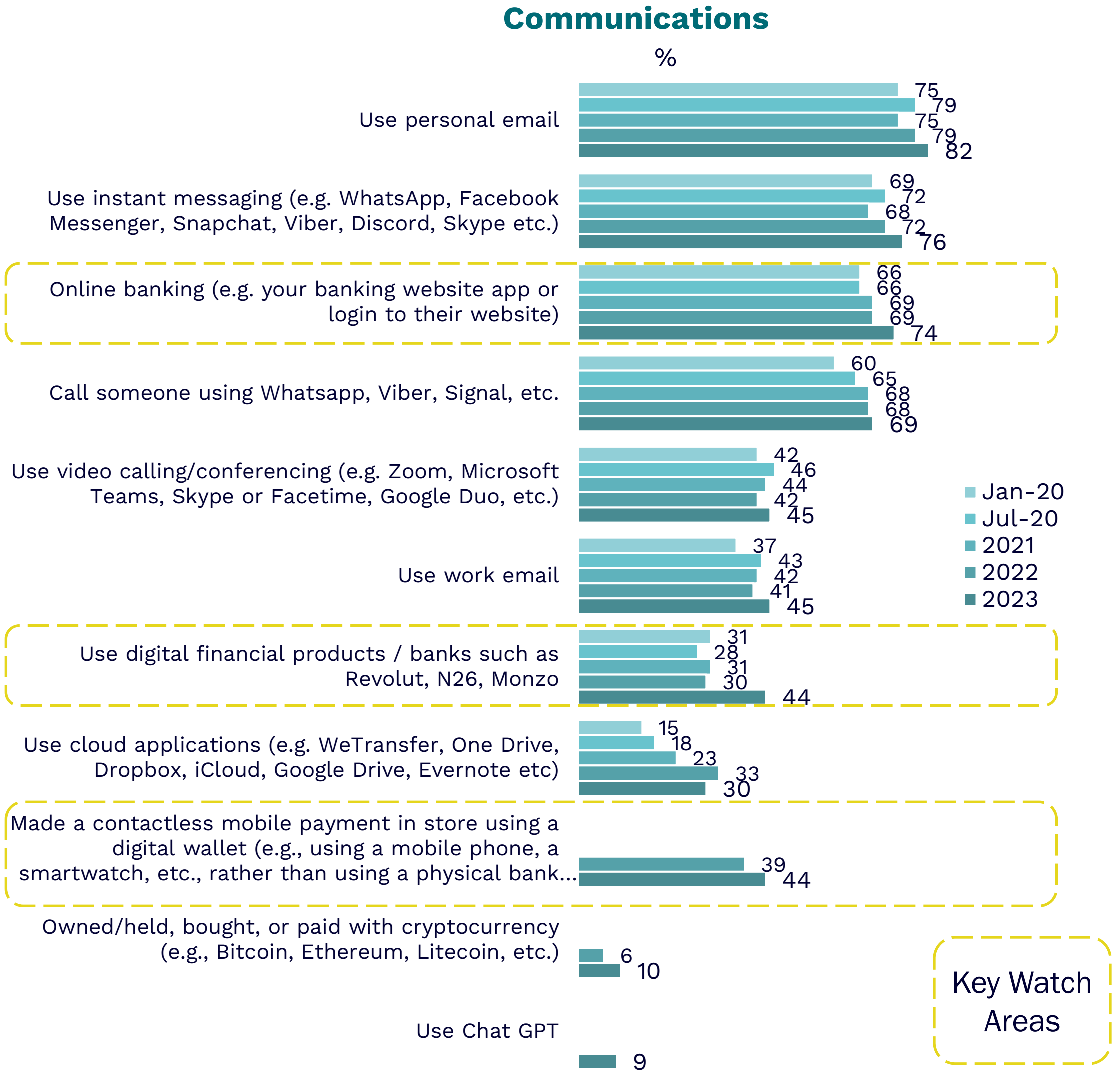
? Q.3 Which of these do you do nowadays anywhere …

( ) = Brackets relate to 2022

Online services we are using nowadays - Trended

Base: All adults 16+ - 1,000





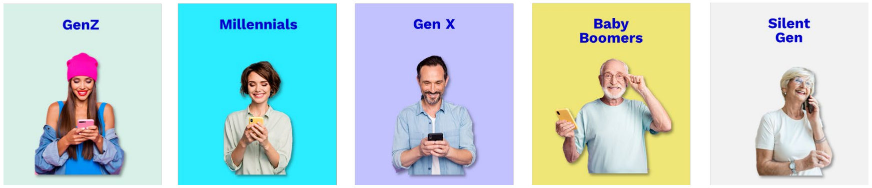
Big growth seen for digital finances. Music streaming and Disney+ are also key watch areas on the entertainment side.

Q.3 Which of these do you do nowadays anywhere …

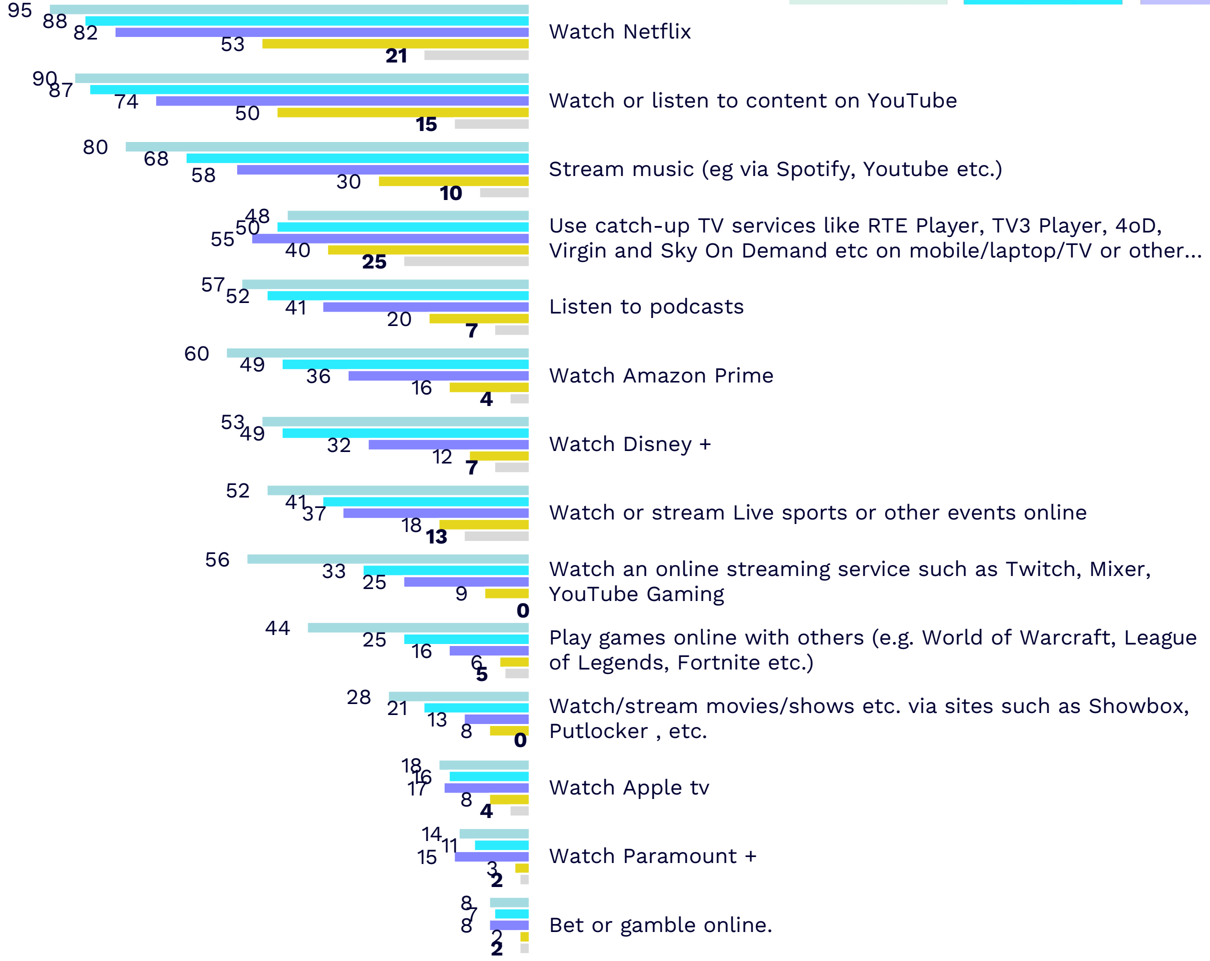
*Disney+ added July 2020

Online services we are using nowadays x Generations

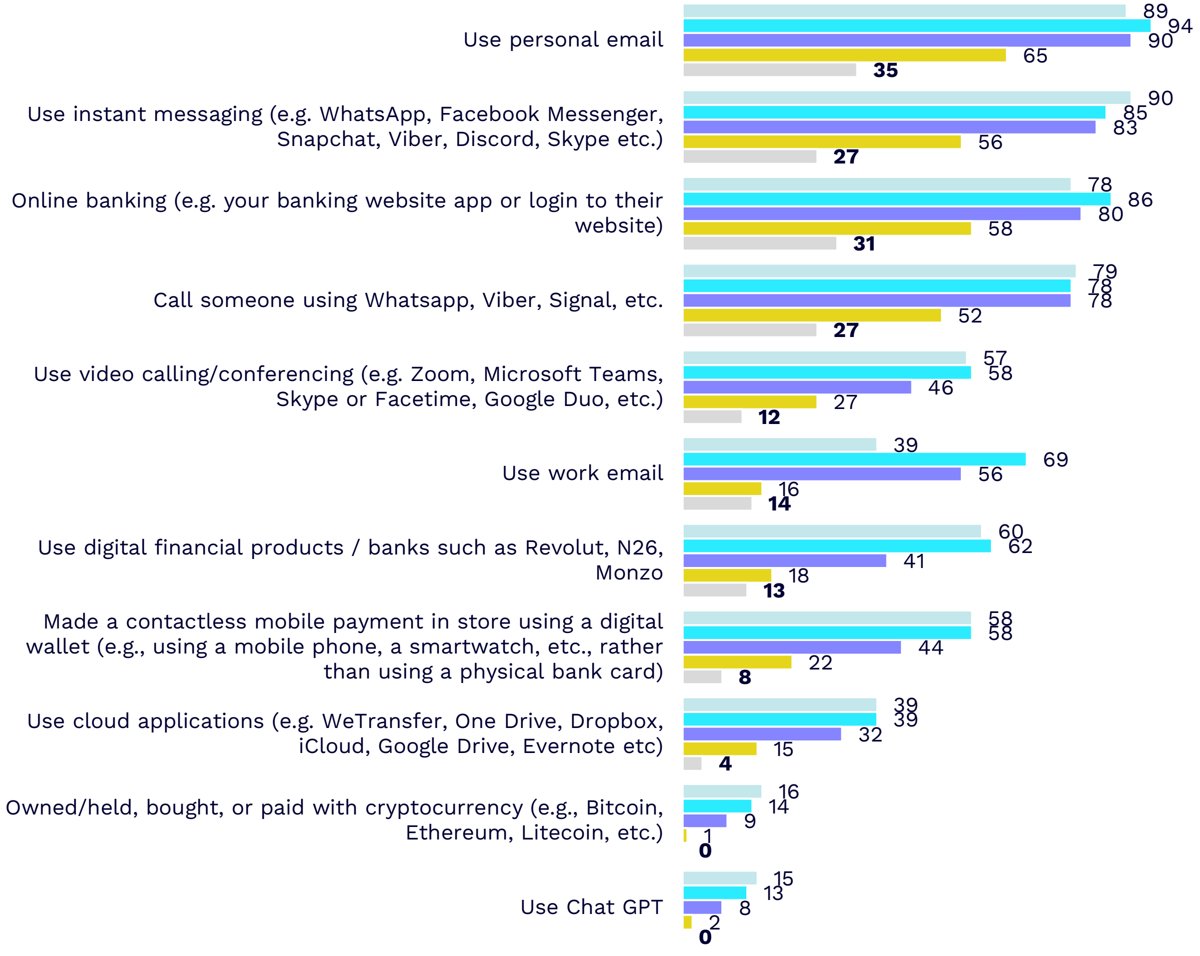
Base: All adults 16+ - 1,000



Entertainment
%



Communications
%



Gen Z and Millennials continue to drive usage across the board

? Q.3 Which of these do you do nowadays anywhere …

Broadband is an essential utility

Reliance on TV falling away significantly, especially for Gen Z and Millennials. For almost 3 in 5 broadband is more important than TV (increase of 10%pts).

Base: All Adults 16+ - 1,000

Broadband is more important to me than TV

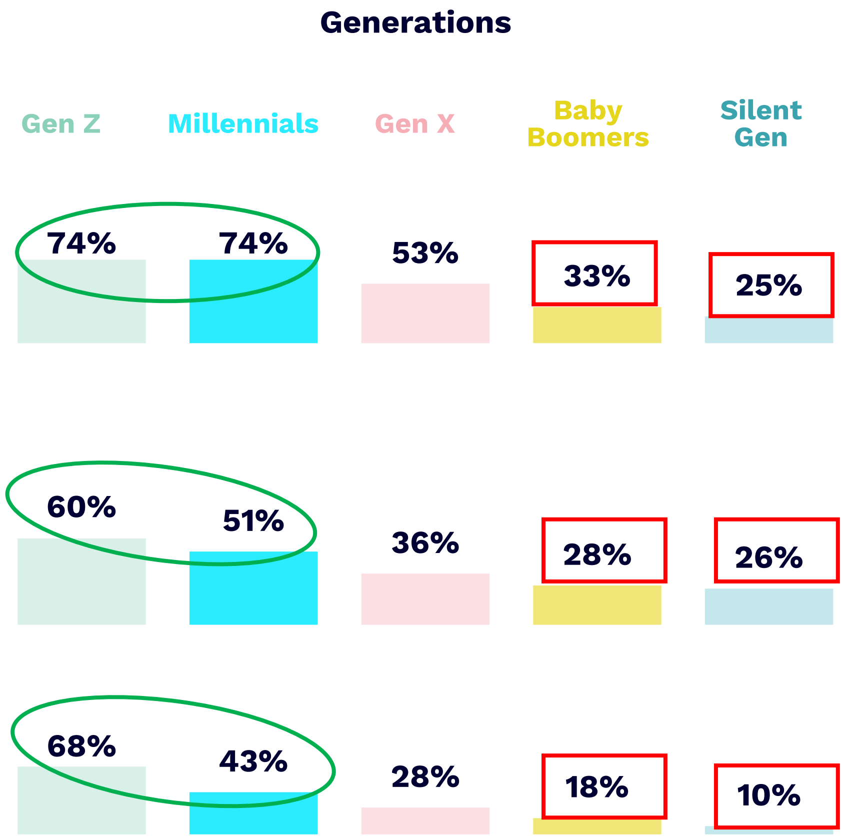
57%
(47%)
Total Pop.

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

42%
Total Pop. Agree

I am watching more content on YouTube than on live TV

36%
(31%)
Total Pop.

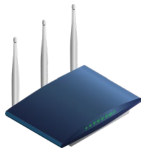


◯ = Significantly higher ▭ = Significantly lower

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

This shift to online entertainment is seen much more among middle class and urban cohorts.

Base: All Adults 16+ - 1,000

			Social class		**Region**		
			ABC1	**C2DE**	**Dublin**	**Other urban**	**Rural**
	Broadband is more important to me than TV	**57%** (47%) **Total Pop.**	**66%**	**50%**	63%	62%	**46%**
	I no longer see the value in paying for live TV plans (e.g. Virgin, Sky) as I can access all content through streaming services	**42%** **Total Pop. Agree**	47%	39%	46%	44%	37%
YouTube	I am watching more content on YouTube than on live TV	**36%** (31%) **Total Pop.**	41%	33%	40%	36%	33%

Significantly higher **Significantly lower**

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

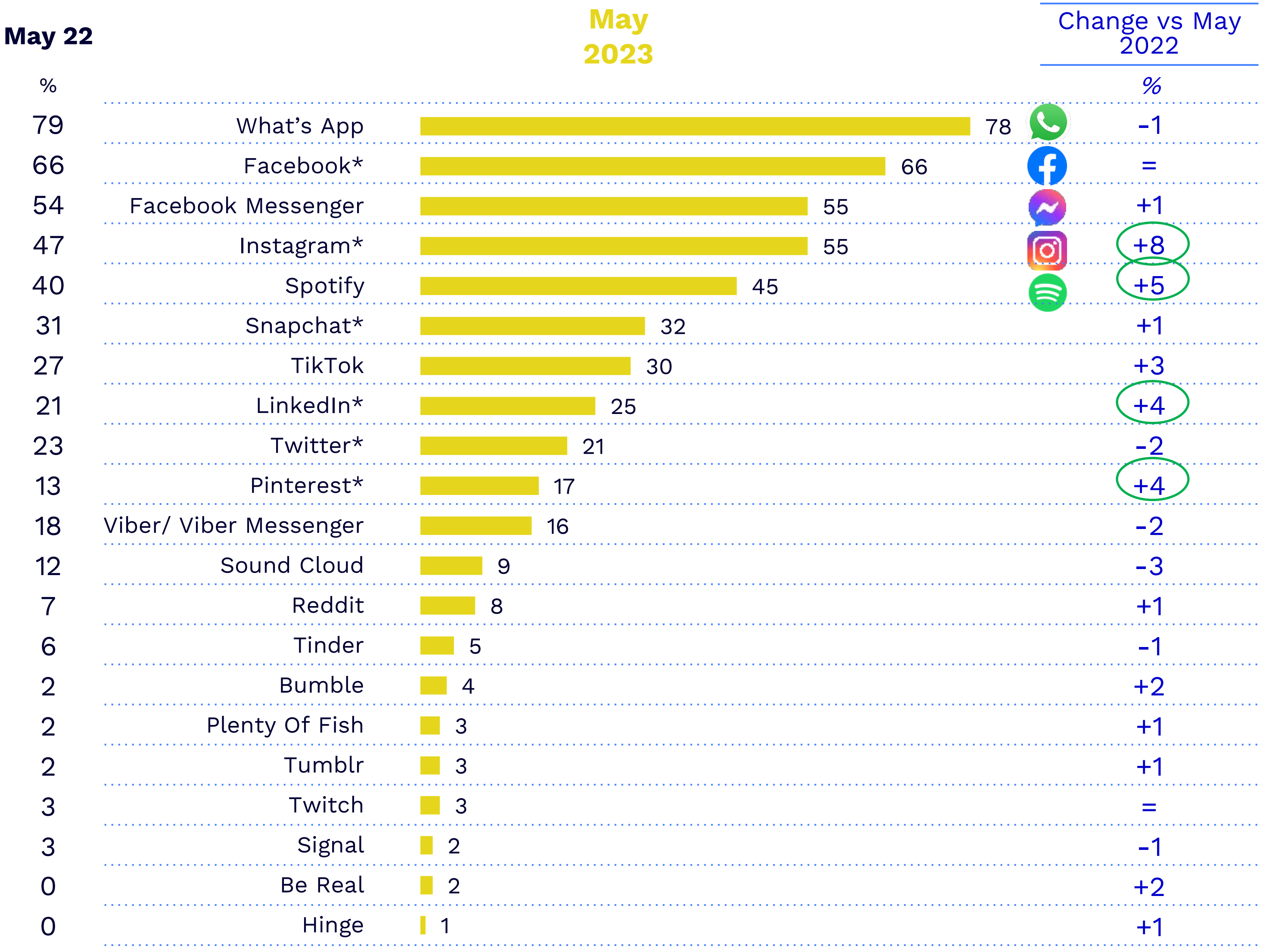
(Online)
Social Animals

Delve Deeper

There is clear reliance on OTT / Social Media for communication, as well as a growth in visual social media

Instagram, LinkedIn, Spotify, & Pinterest grow

Base: All Adults 16+ - 1,000



May 22		May 2023	Change vs May 2022
%			%
79	What's App	78	-1
66	Facebook*	66	=
54	Facebook Messenger	55	+1
47	Instagram*	55	+8
40	Spotify	45	+5
31	Snapchat*	32	+1
27	TikTok	30	+3
21	LinkedIn*	25	+4
23	Twitter*	21	-2
13	Pinterest*	17	+4
18	Viber/ Viber Messenger	16	-2
12	Sound Cloud	9	-3
7	Reddit	8	+1
6	Tinder	5	-1
2	Bumble	4	+2
2	Plenty Of Fish	3	+1
2	Tumblr	3	+1
3	Twitch	3	=
3	Signal	2	-1
0	Be Real	2	+2
0	Hinge	1	+1

Facebook and WhatsApp remain the most popular social media and OTT services used in 2023, however Instagram catching up

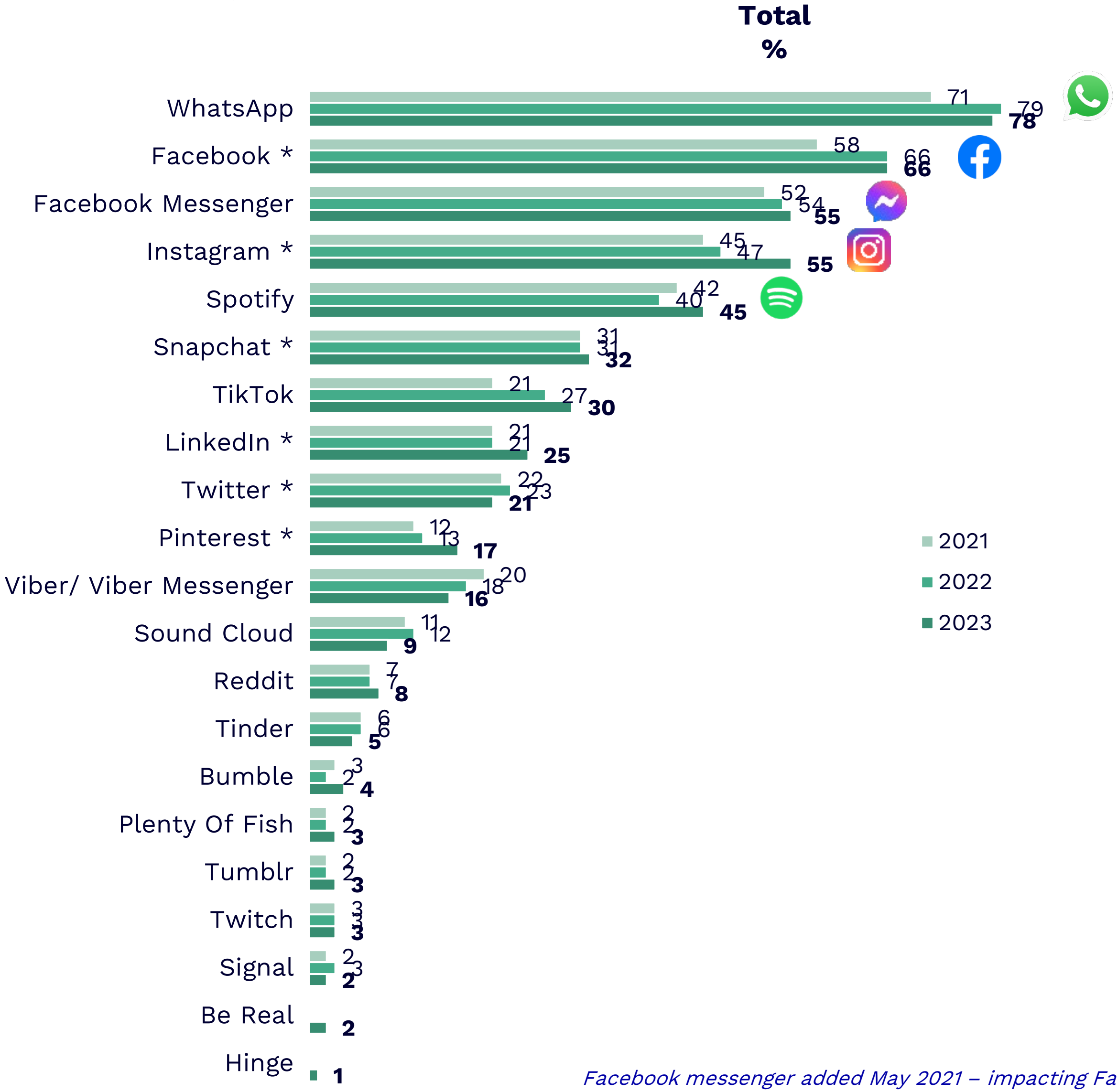
ANY Social Media	80%
ANY Messaging Apps	83%
ANY Dating Apps	8%
ANY Music	46%

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

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

Social media platforms we are using nowadays - Trended

Base: All Adults 16+ - 1,000



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

Since May 2021, Instagram and Tik Tok have shown the largest increases in usage

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

TikTok

76%

GenZ are on TikTok

Total population 30%

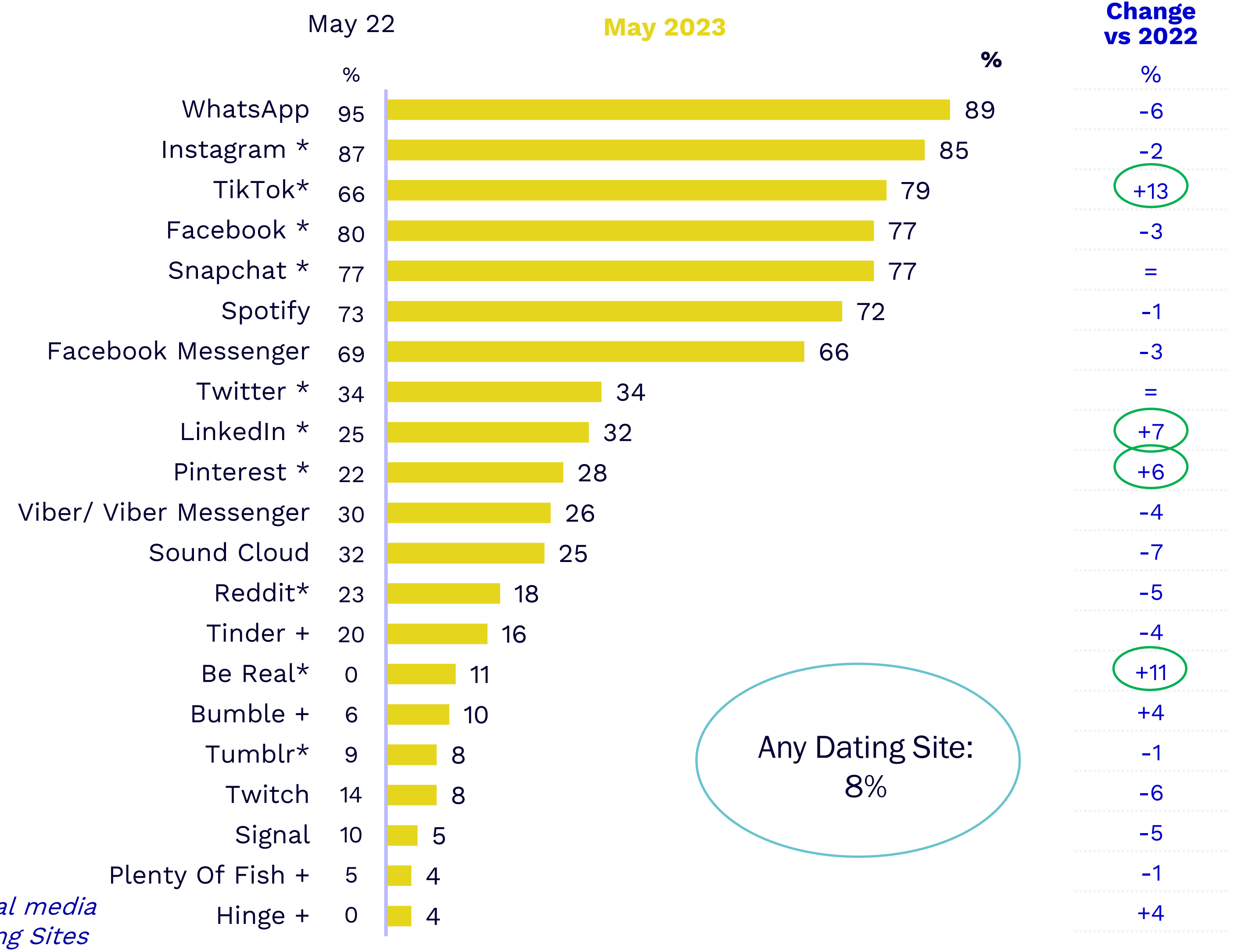
Generations

Gen Z	76% ○
Millennials	37% ○
Gen X	18% ▭
Baby Boomers	8% ▭
Silent Gen	- ▭

○ = Significantly higher ▭ = Significantly lower

Instagram remains the most popular social media platform among 16-24 year olds, albeit this is decreasing while TikTok continues to narrow the gap with significant increases. Tinder appears to be losing some ground here, with Bumble and Hinge making in-roads in terms of online dating

Base: All 16-24 yrs - 128



	May 22	May 2023	Change vs 2022
	%	%	%
WhatsApp	95	89	-6
Instagram *	87	85	-2
TikTok*	66	79	+13
Facebook *	80	77	-3
Snapchat *	77	77	=
Spotify	73	72	-1
Facebook Messenger	69	66	-3
Twitter *	34	34	=
LinkedIn *	25	32	+7
Pinterest *	22	28	+6
Viber/ Viber Messenger	30	26	-4
Sound Cloud	32	25	-7
Reddit*	23	18	-5
Tinder +	20	16	-4
Be Real*	0	11	+11
Bumble +	6	10	+4
Tumblr*	9	8	-1
Twitch	14	8	-6
Signal	10	5	-5
Plenty Of Fish +	5	4	-1
Hinge +	0	4	+4

Any Dating Site: 8%

** = Social media*
+ = Dating Sites

BeReal & Hinge added May 2023

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

89%

85%

79%

16-24's

SoundCloud, Instagram, and Twitch showing biggest decline amongst 16-24's

77%

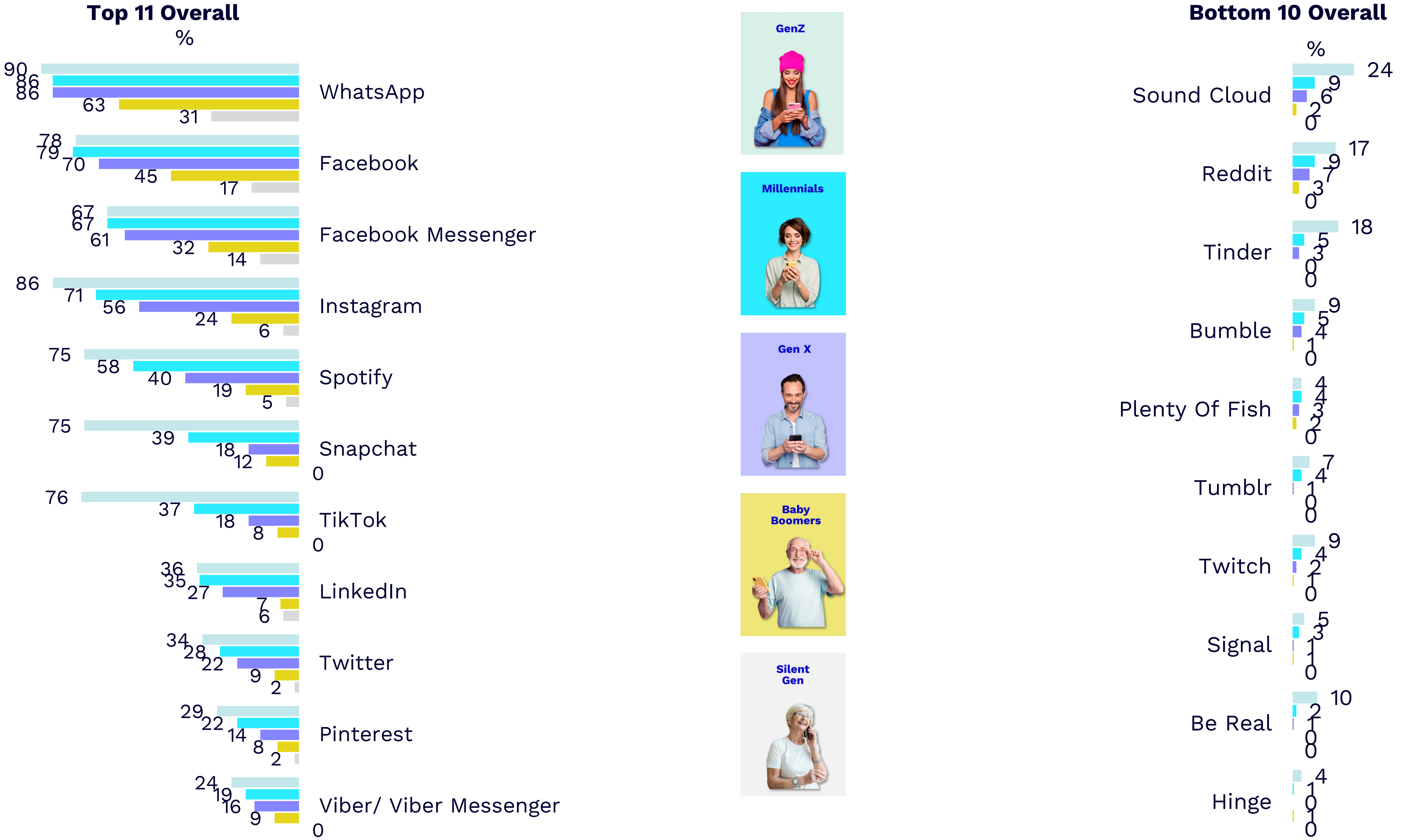
77%

72%

66%

Online services we are using nowadays x Generations

Base: All adults 16+ - 1,000

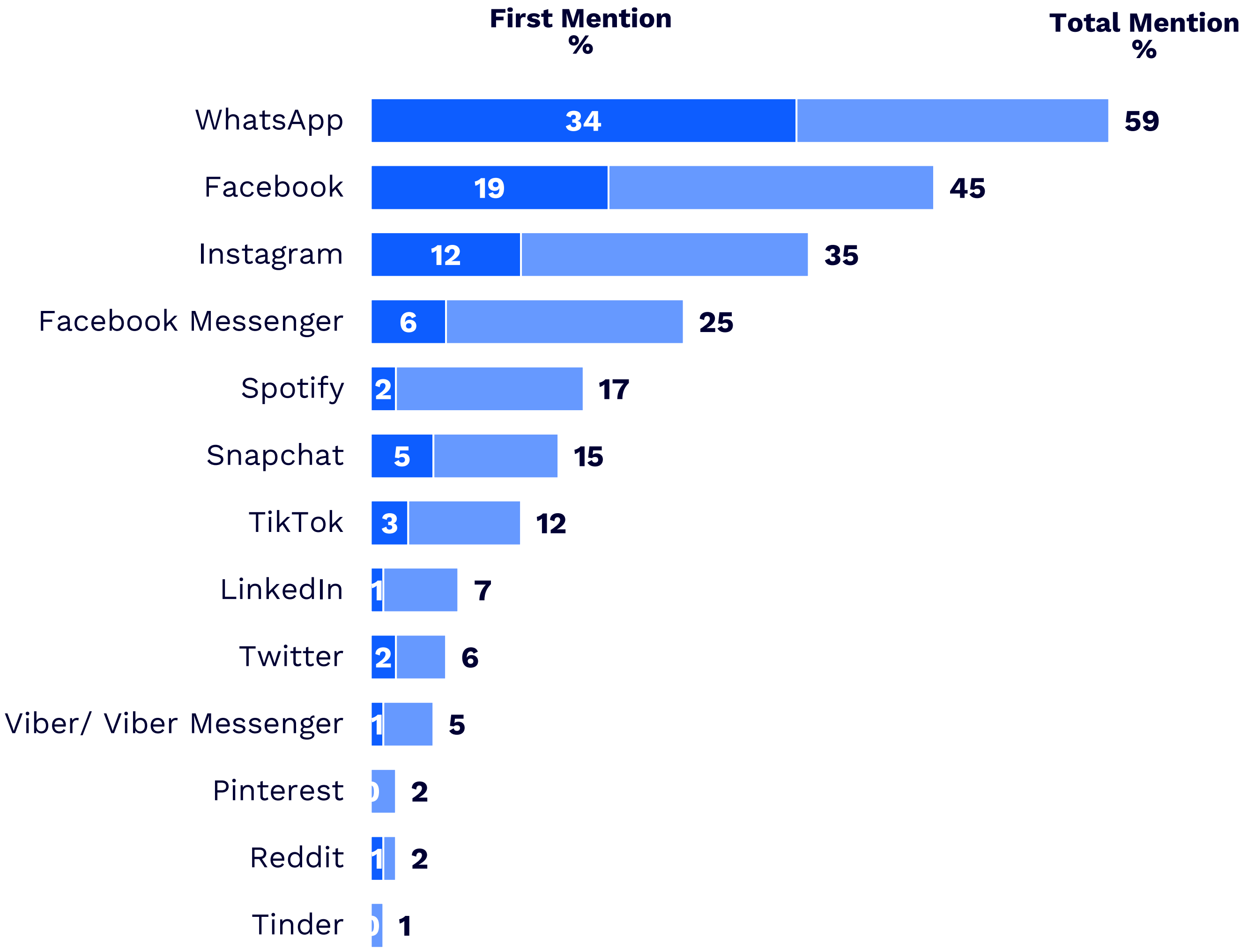


WhatsApp shows highest usage across all generations, while dating apps are almost reserved for those under 50.

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

WhatsApp shows highest usage. Only Gen Z have a different app as their most used. Millennials and Gen Z show the widest variance in most used apps

Base: All adults 16+ - 1,000



Generations

	Top Used App	
Gen Z	Instagram & Snapchat	21% ○
Millennials	WhatsApp	32%
Gen X	WhatsApp	42% ○
Baby Boomers	WhatsApp	44% ○
Silent Gen	WhatsApp	24%

○ = Significantly higher ☐ = Significantly lower

? Q.5a And which one do you mostly use?

Among those who share posts online (54%), the average number of weekly posts is

5

(5 in 2022)

Generations

Gen Z	8	*(9)*
Millennials	4	*(5)*
Gen X	3	*(3)*
Baby Boomers	2	*(4)*
Silent Gen	2	*(2)*

() 2022

○ = Significantly higher □ = Significantly lower

Q.9 How many times a week would you post something online on a social media site or blog?

Impact of our Online Lives

B&A TechScape 2023

44% agree that technology is having a negative impact on family life in their home (e.g. people spending too much time on different devices, etc.)

Generations

Gen Z	35%
Millennials	50%
Gen X	49%
Baby Boomers	41%
Silent Gen	32%

Gen Z likely agreeing less as tech in the home has been a factor for most of their lives.

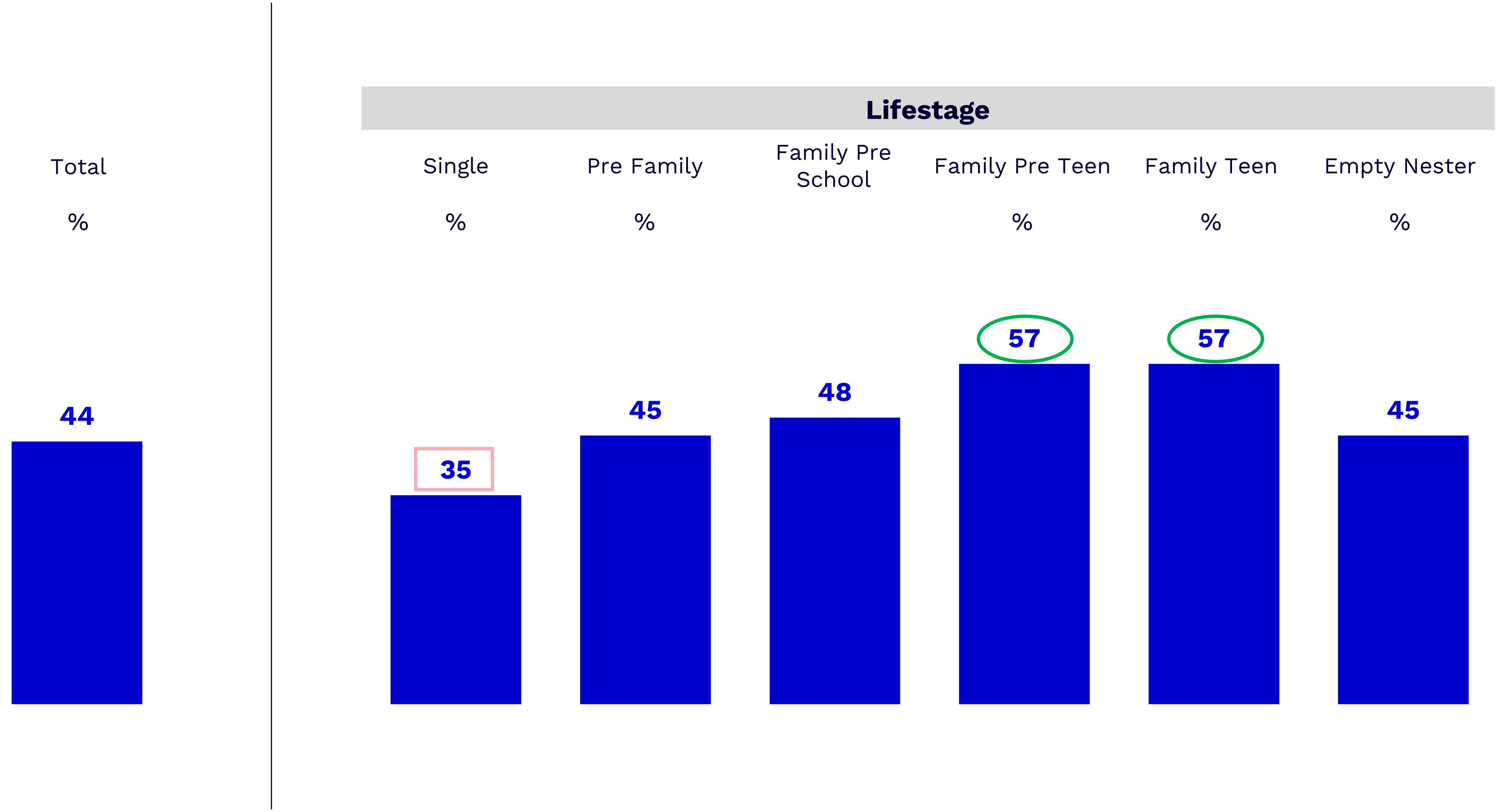
○ = Significantly higher ☐ = Significantly lower

Those with pre-teens and teens in the home show higher agreement that tech is having a negative impact on family life in the home.

Base: All Adults 16+ - 1,000

○ = Significantly higher

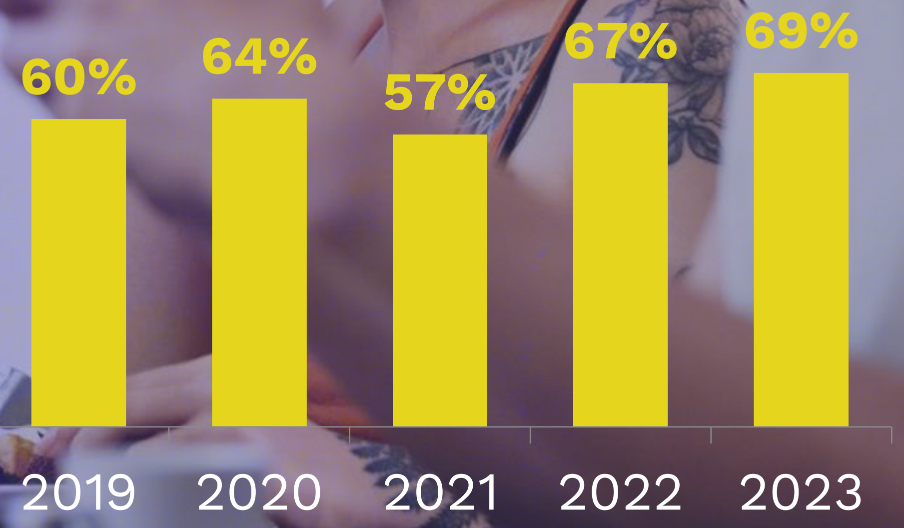
☐ = Significantly lower



Q.13 To what extent do you agree or disagree ...Technology is having a negative impact on family life in my home (e.g. people spending too much time on different devices, etc)

7 in 10

feel we have lost the art of conversation



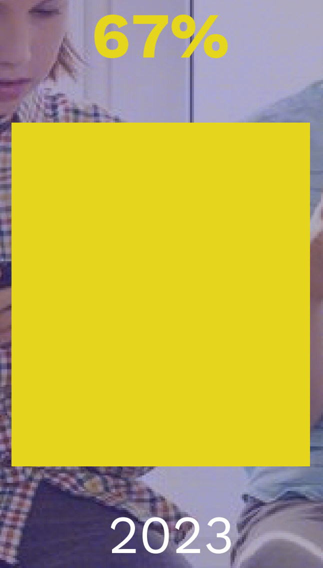
Age

	2019	2020	2021	2022	2023
	%	%	%	%	%
16-24	47	47	52	52	55
25-34	54	61	64	62	62
35-49	62	68	60	64	69
50-64	69	67	60	75	76
65+	60	69	49	74	76

The 50+ age group is driving the increase – those under 25 are increasingly disagreeing, with this more likely to be their norm.

○ = Significantly higher ☐ = Significantly lower

2 in 3 worry that children's ability to communicate in person has been stunted due to technology



Age

	2023
	%
16-24	□ 49
25-34	61
35-49	72
50-64	○ 76
65+	70

Lifestage

	2023
	%
Family Pre-teen	○ 76
Family Teen	○ 78

Those with kids, either pre-teen or teenagers, show higher concern – likely seeing this first hand.

○ = Significantly higher □ = Significantly lower

1 in 3

find it hard to switch off from thinking about work/school/college in their spare time in the evening/weekends

B&A

Age

	2021	2022	2023
	%	%	%
16-24	39	39	48
25-34	34	33	38
35-49	26	21	41
50-64	18	14	25
65+	9	10	11

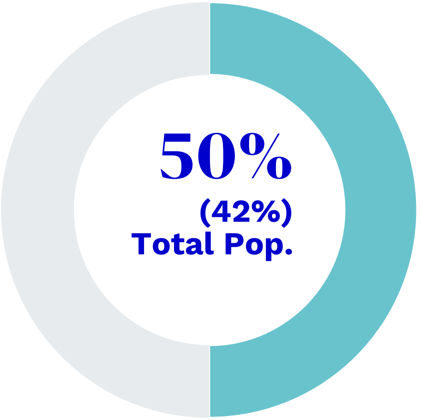
Those under 50 are struggling to switch off, with a significant increase from 2022.

○ = Significantly higher ☐ = Significantly lower

However, more of us are checking social media/emails first thing in the morning and last thing at night – this is higher among those WFH

Base: All Adults 16+ who use SM (876)

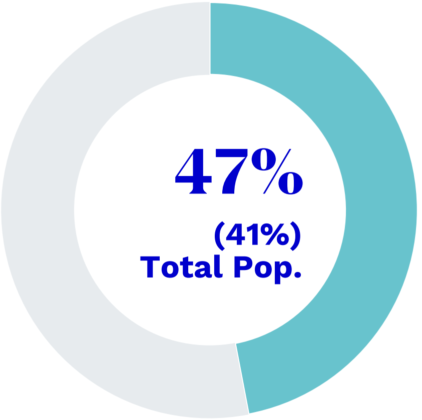
The first thing I do in the morning is check emails, text messages, or social media sites



Work from Home

ANY Yes	No	ANY Regular WFH
58%	47%	**58%**

The last thing I do at night is check emails, text messages or social media sites



Work from Home

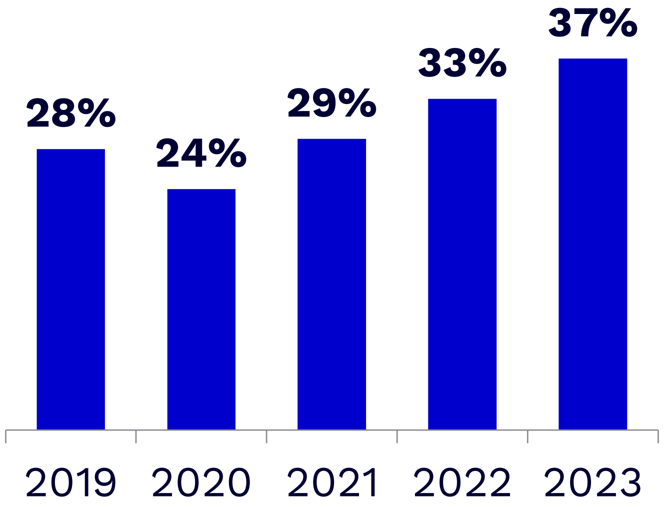
ANY Yes	No	ANY Regular WFH
57%	47%	**56%**

Significantly higher **Significantly lower**

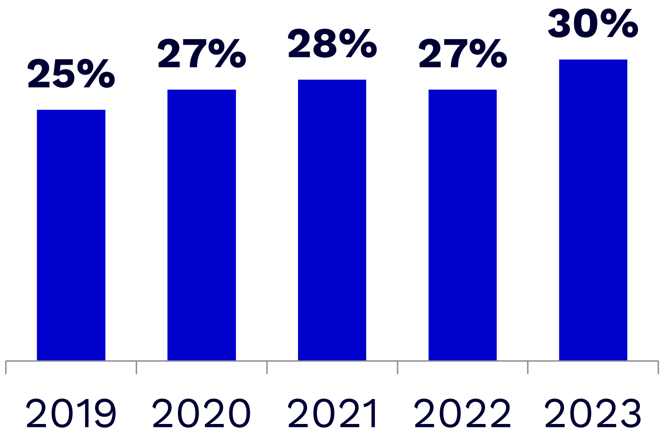
There is also a growth in those checking social media/emails when having difficulty sleeping and work emails when on holidays. Millennials showing least disconnect when considering both metrics together

Base: All Adults 16+ (1000)

Check social media or emails when having difficulty sleeping



Check work emails when on holidays



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

(43% amongst all working – ABC1)

Generations	Check social media or emails when having difficulty sleeping	Check work emails when on holidays
Gen Z	○ 64%	29%
Millennials	○ 52%	○ 44%
Gen X	32%	34%
Baby Boomers	☐ 12%	☐ 11%
Silent Gen	☐ 4%	☐ 13%

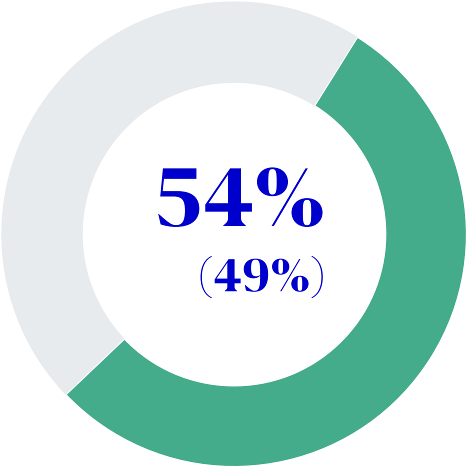
○ = Significantly higher ☐ = Significantly lower

() – 2022 Data

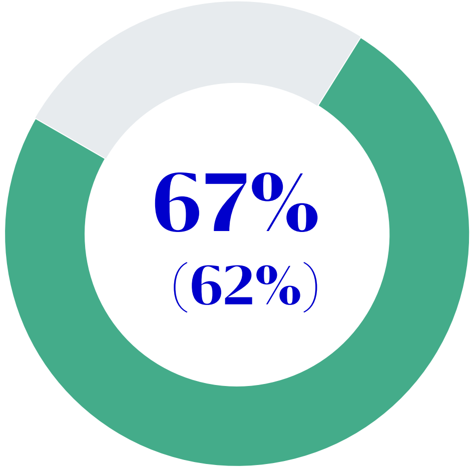
Increased concern surrounding data privacy

Growing numbers worrying about data privacy. Although millennials show strong usage of online services, they also appear to be most concerned

Worry About Data Privacy Online



I am concerned in general nowadays regarding how my data is used by organisations



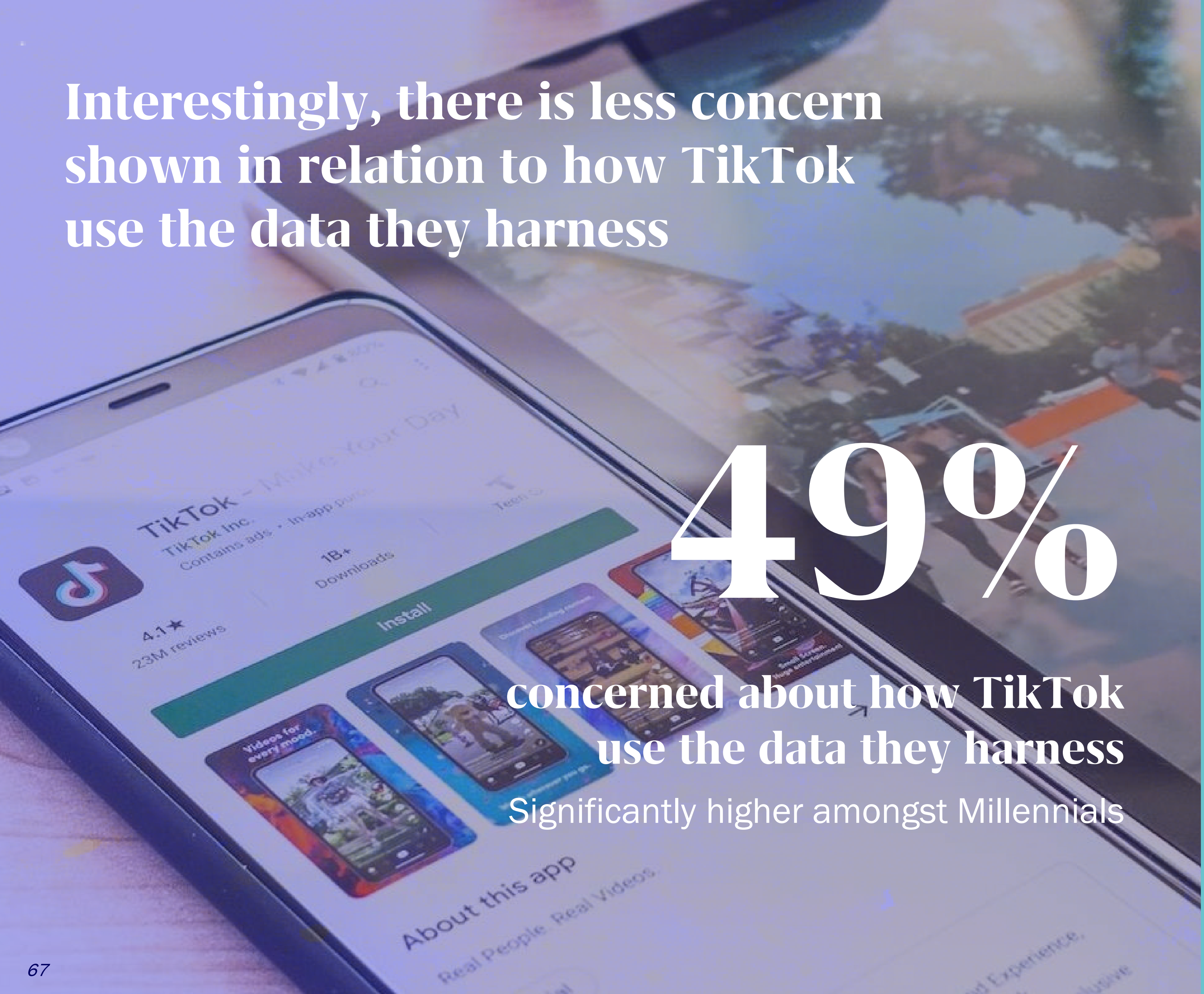
()=2022 data

Generations

	Worry About Data Privacy Online	I am concerned in general nowadays regarding how my data is used by organisations
Gen Z	49%	57%
Millennials	63%	72%
Gen X	59%	70%
Baby Boomers	45%	69%
Silent Gen	32%	52%

◯ = Significantly higher ▭ = Significantly lower

Interestingly, there is less concern shown in relation to how TikTok use the data they harness



49%

concerned about how TikTok use the data they harness

Significantly higher amongst Millennials

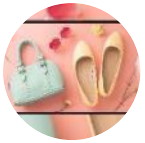
Generations

Gen Z	49%
Millennials	◯ 59%
Gen X	50%
Baby Boomers	□ 39%
Silent Gen	□ 28%

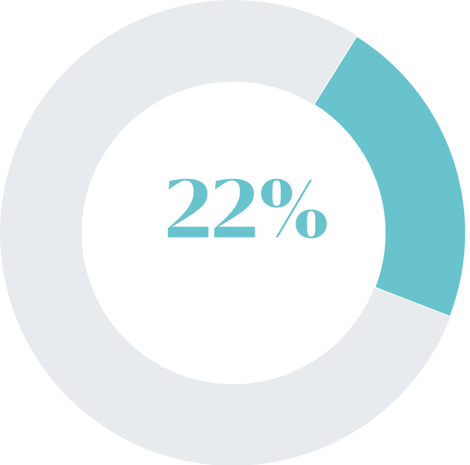
◯ = Significantly higher □ = Significantly lower

Influencers are growing in importance (most important among Gen Z)

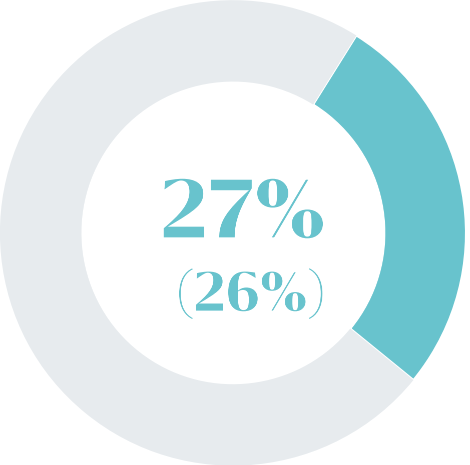
Over 1 in 4 follow influencers online, with 1 in 5 purchasing products / services endorsed by these influencers. Following brands on social media showing a reduction, particularly among Gen Z (-11%pts since 2022)

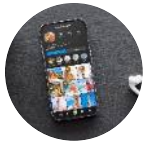


Buy products or services based on recommendations from ‘Influencers’/ Celebrity endorsements

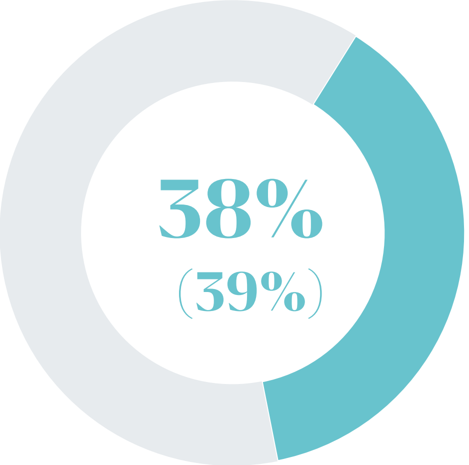


I follow a lot of celebrities, youtubers or “influencers”





I follow brands on social media (i.e. on Facebook, Instagram, etc.)



()=2022 data

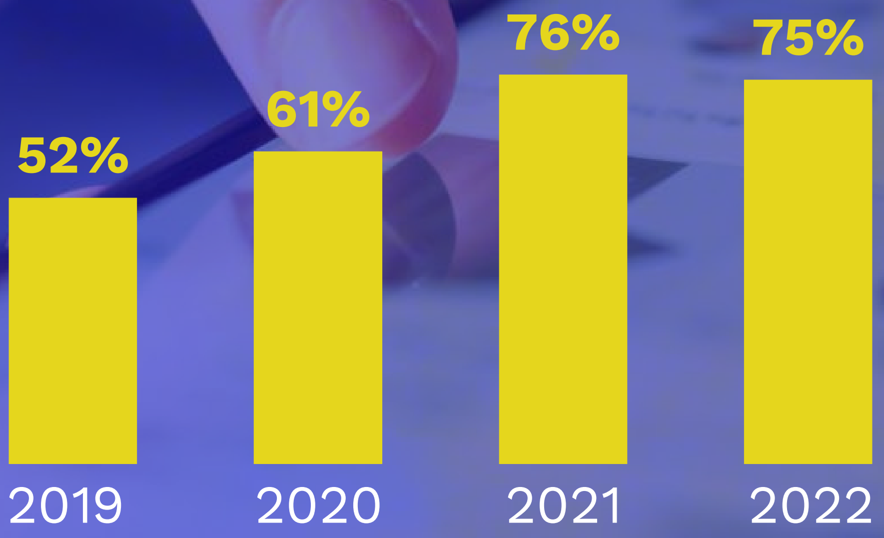
Generations



	Buy products or services based on recommendations from ‘Influencers’/ Celebrity endorsements	I follow a lot of celebrities, youtubers or “influencers”	I follow brands on social media (i.e. on Facebook, Instagram, etc)
Gen Z	◯ 45%	◯ 58%	◯ 68%
Millennials	27%	30%	◯ 52%
Gen X	20%	□ 19%	33%
Baby Boomers	□ 5%	□ 12%	□ 13%
Silent Gen	□ 2%	□ 9%	□ 1%

◯ = Significantly higher □ = Significantly lower

Online Purchasing & Activities



4 in 5 (81%) of the population purchase online*

The under 50's continue to be the main online purchasers (however growth among Baby Boomers and the Silent Gen).

* The defined category of; clothes/shoes, groceries, pharmaceutical drugs/medicines, flights, hotel bookings, car hire bookings, music/film downloads/CD/DVDs/TV shows, computer games, books/magazines, electric goods (including mobile phones), none of these

Online purchasing has seen an increase since 2022 (+6%pts)

Base: All purchasing good/services online @Q8 - 693

Flights
86%
(84%)
[83%]

Hotel bookings
85% ↑
(81%)
[80%]

Clothes/ shoes
78%
(78%)
[76%]

Electric goods
44%
(46%)
[48%]

Car hire
38% ↑
(32%)
[38%]

Music/film downloads /CD/DVDs/ TV shows
36%
(34%)
[36%]

Magazine/ Book
36%
(34%)
[32%]

Computer games
28%
(29%)
[27%]

Groceries
20%
(20%)
[10%]
Equates to 15% of the total population

Pharm drugs/ medicines
16%
(12%)
[10%]

BUY

( ) = 2022
[] = 2019

Online purchases Generations

Gen Z	○ 93%	(86%)
Millennials	○ 96%	(93%)
Gen X	○ 86%	(89%)
Baby Boomers	□ 58%	(53%)
Silent Gen	□ 29%	(25%)

The previous increase seen post-pandemic in flights and hotel bookings has continued to increase, though not as stark. Most other services have also recorded increases or have remained steady. Increases in online purchasing across all generations, with the exception of Gen X.

○ = Significantly higher □ = Significantly lower

? Q.10 Do you buy products or services online nowadays from any of the following categories?

15%

of all adults have purchased groceries online (15% in 2022)

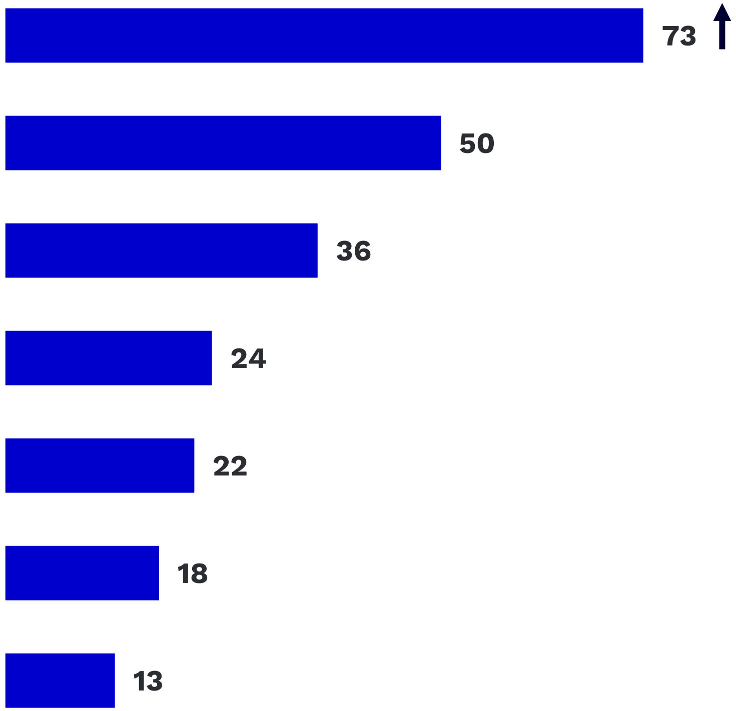
(Higher amongst middle-class Dubliners)

Other online services have also seen increases, particularly Google Maps.

B&A

Base: All adults 16+ - 1,000

Significantly higher **Significantly lower**



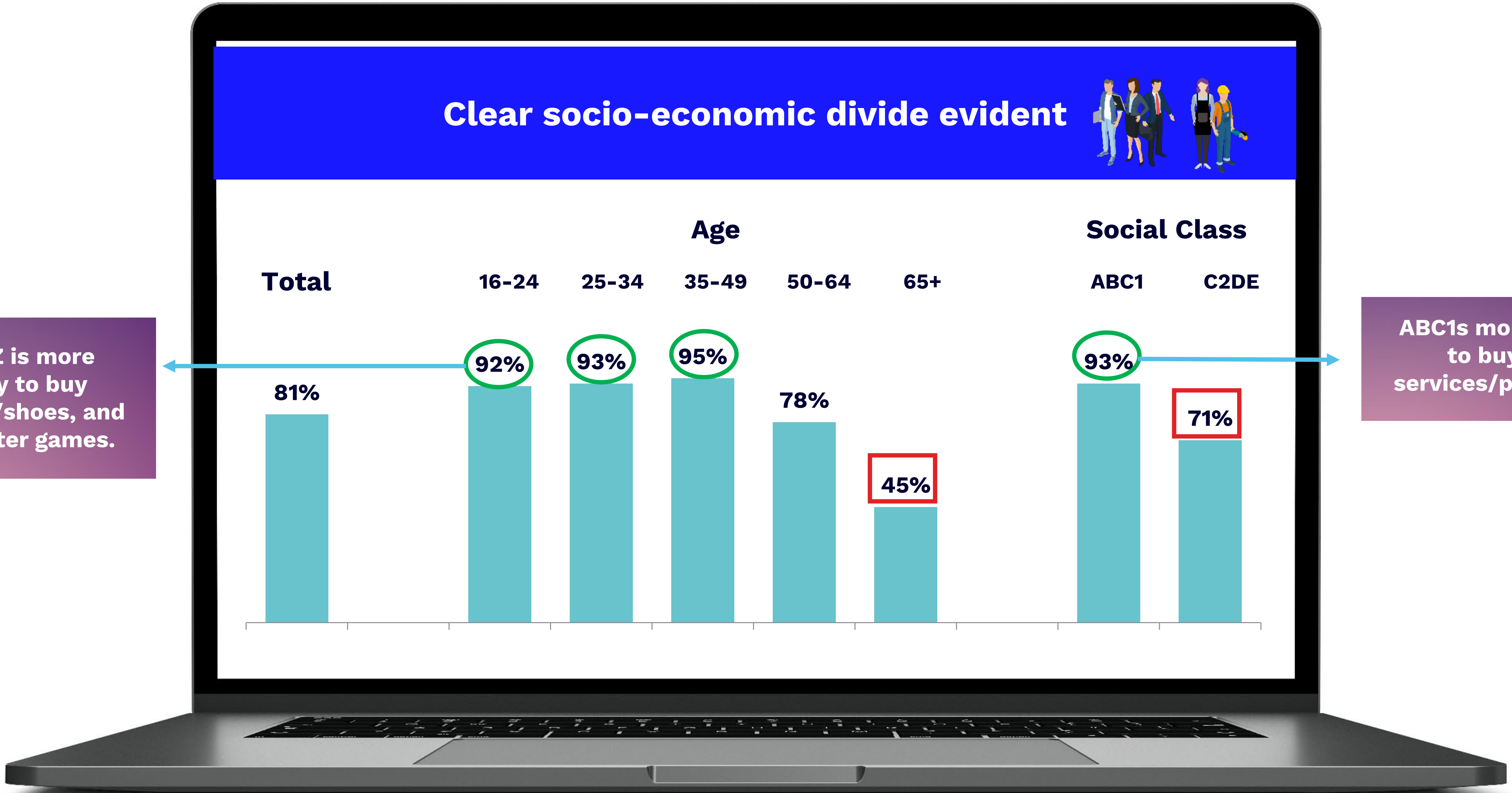
	2022		Generation				
			Gen Z	**Millennials**	**Gen X**	**Baby Boomers**	**Silent Gen**
			150	*287*	*240*	*271*	*52*
	%	**%**	%	%	%	%	%
Use Google maps to check your location or get directions	*62*	**73** ↑	**84**	**88**	78	**50**	**23**
Research products on your mobile phone when in a store	*48*	**50**	**71**	**69**	50	**22**	**9**
Use food apps, such as Deliveroo or Just eat, for home delivery	*35*	**36**	**53**	**53**	33	**10**	**9**
Use Apps to help meditate/relax/disconnect from the world	*21*	**24**	**36**	**31**	25	**9**	**6**
Interact with devices in your home remotely via an App e.g. turn on heating, lights, watch a security camera, use an app to record a TV programme etc.	*19*	**22**	29	**28**	23	**9**	**8**
Turned on heating or other household devices remotely via an app (e.g. recording a programme on TV or turning on the heating).	*15*	**18**	19	**25**	23	**8**	**3**
Make Tik Tok videos	*-*	**13**	**42**	14	**6**	**2**	**-**

Gen Z and Millennials driving usage of these online services, however Gen Z show some reduced usage across a number of key services since 2022.

? Q.8 Which, if any of the following do you do nowadays?

The under 50s and middle class continue to be the main online purchasers

Base: All Adults 16+ - 1,000



Clear socio-economic divide evident

Gen Z is more likely to buy clothes/shoes, and computer games.

ABC1s more likely to buy all services/products;

◯ = Significantly higher 🟥 = Significantly lower

Q.10 Do you buy products or services online nowadays from any of the following categories?

What we are buying online x Generation

Base: All Adults 1,000

Significantly higher **Significantly lower**

B&A

	Total	Generation				
		Gen Z	Millennials	Gen X	Baby Boomers	Silent Gen
UNWTD	*1000*	*150*	*287*	*240*	*271*	*52*
	%	%	%	%	%	%
Flights	68	69	**84**	**76**	**50**	**25**
Hotel Bookings	67	66	**82**	**76**	**48**	**25**
Clothes / shoes	62	**84**	**83**	63	**29**	**9**
Electric goods (including mobile phones)	33	40	**51**	32	**11**	**9**
Car Hire Bookings	29	26	**38**	35	**19**	**9**
Music/film downloads/CD/DVDs/TV shows	27	**40**	**38**	27	**9**	**4**
Books/Magazines	27	33	**36**	30	**12**	**11**
Computer Games	21	**34**	**32**	19	**4**	**2**
Groceries	15	13	**23**	17	**7**	**4**
Pharmaceutical drugs/medicines	12	16	**17**	13	**5**	**-**

Millennials driving online purchasing, with Gen Z and Gen X also contributing.

? Q.10 Do you buy products or services online nowadays from any of the following categories?

Top Tech Summary 2023

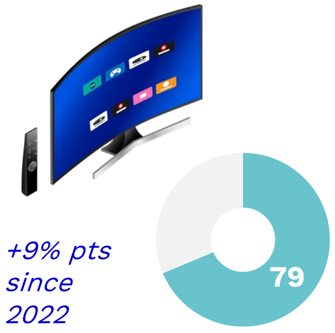
Delve Deeper

B&A TechScape 2023

Top tech summary

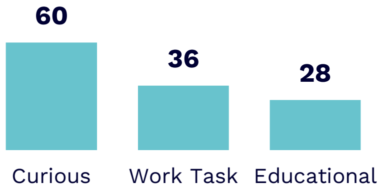
B&A

Ownership of smart TVs continues to grow.

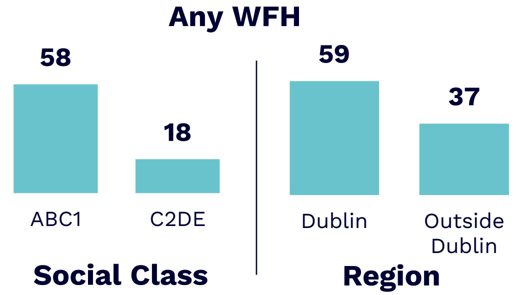


Chat GPT is used by 1 in 10 in Ireland.

Curiosity is the leading driver in engaging.



Working from home remains steady at 1 in 4 ever WFH, however, the class and regional divide is growing.



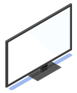
Families with teens & pre-teens both have an average of **10-11 Smart Devices** (the average home has 8).

Gen Z may be showing **signs of growing desire for authenticity** – reductions seen in average smart devices, apps and online services. With that said, they do still remain a key user cohort of the majority of tech, apps, and services.

44% of Irish consumers now use digital financial operators e.g. Revolut, N26, Monzo (+11%pts vs 2022) – driven by the middle class, younger cohorts, & Dubliners.

Revolut
N26
monzo

Though still increasing, 2023 has seen a slight lull in TV Streaming growth, with the exception of Disney.



NETFLIX	prime	Disney+	Catch Up TV
76%	38%	35%	47%
(+3% pts)	*(-% pts)*	*(+6% pts)*	*(+4% pts)*

55% among total

76% among Gen Z

Instagram showing biggest increase among social media sites, while **TikTok** shows biggest growth among Gen Z, moving up to third most popular social media sites.

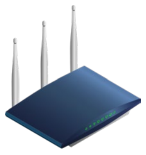
WhatsApp and Facebook remain the most popular social media and OTT services used in 2023, but Instagram is catching up.

(Amongst the **16-24** age group **TikTok, LinkedIn, & Pinterest** experienced the most significant increase since 2022.

Online purchasing

4 in 5 of the population purchase online. Millennials are the main drivers, with Gen Z and Gen X also contributing.

Influencers playing a role here too, with 1 in 5 buying something endorsed by influencers (45% of Gen Z).



For roughly **3 in 5**, broadband is more important than TV, especially for **GenZ** and **Millennials**.

Concerns around data privacy and AI are clear with 2 in 3 concerned about how their data is used by organisations, while another 2 in 3 agree that AI tools should be regulated.

Following attempts to switch off in 2022, we now see signs of a reversal in 2023. The **number of people who check their emails, texts, or social media first & last thing in the day have increased significantly**, as well as those checking their work emails when on holidays.

What does the future hold for our relationship with Tech?

This latest B&A TechScape research has been carried out against the backdrop of the Chat GPT and AI explosion. Given the rapid tech growth over the last 5 years and the potential impact of AI, there are profound implications for society.

Technology, by its very nature, has always been pushing boundaries and has expanded its reach into our lives, so much so that we now simply could not leave our homes without our smartphones. At this stage, we are hugely reliant on technology to function as a human race, from entertainment right through to life administration (banking, communication, shopping, etc.). From the minute we wake up we are immersed in a tech world. The dopamine hits we receive from our social media accounts are addictive. Technology will become ever more pervasive in our lives.

These latest developments in the AI space have both great potential for new services and advancement in areas such as health, etc, but also the potential to disrupt our society and lives. We simply do not fully understand the seemingly limitless power of AI and the possible impact this will have on our day-to-day lives. It does seem that the public has been tuning into the warnings with two in three agreeing that they are concerned about AI and feel it should be regulated.

This concern is shared widely even within the tech field.

> *"It can be very harmful if deployed wrongly and we don't have all the answers there yet – and the technology is moving fast. So. does that keep me up at night? Absolutely"* Sundar Picchai, CEO of Google

The judiciary will need to play a vital role in AI moving forward. In 2004, Mark Zuckerberg had a simple idea to connect college students together on one platform. This developed into Facebook, marking the beginning of the Social Media era, which has been left relatively unchecked, allowing for tech companies to expand their reach and influence in our lives. We didn't realise Social Media's power until it was too late. Surely, history cannot repeat itself with AI – we have been warned.

Delve Deeper

Thank You

@behaviourandattitudes

Behaviour & Attitudes

@banda_ie

Behaviour & Attitudes

Milltown House, Mount Saint Annes,
Milltown, Dublin 6, D06 Y822
+353 1 205 7500 | info@banda.ie
www.banda.ie

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