B&A RESEARCH & INSIGHT

TechScape 2020

@banda_ie behaviour&attitudes

behaviour&attitudes

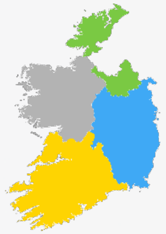
info@banda.ie Tel: 01 205 7500

www.banda.ie

J.1605 AM

Introduction

TechScape is conducted on our face-to-face CAPI Omnibus amongst a fully representative sample of 1,000 adults aged 16+ years.



The sample is stratified by age within gender by town size across 63 sampling points nationwide. An overall socio-economic status quota is also applied.

As such, the sample is fully representative of all Irish adults, and not limited solely to the online population.

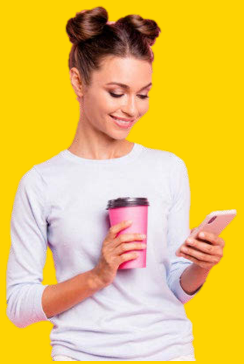
The fieldwork for this study was conducted between the 18th and 29th January 2020.

Introduction

In order to gain deeper insight into the tech habits of Irish consumers, **lifestage 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 generation have been detailed below:

GenZ



Born 1997 – 2004
Age 16 – 23

13%

482,000

Millennials

Born 1978-1996
Age 24 - 42

35%

1,286,000

Gen X

Born 1966-1977
Age 43-54

21%

758,000

Baby Boomers

Born 1947-1965
Age 55-73

25%

931,000

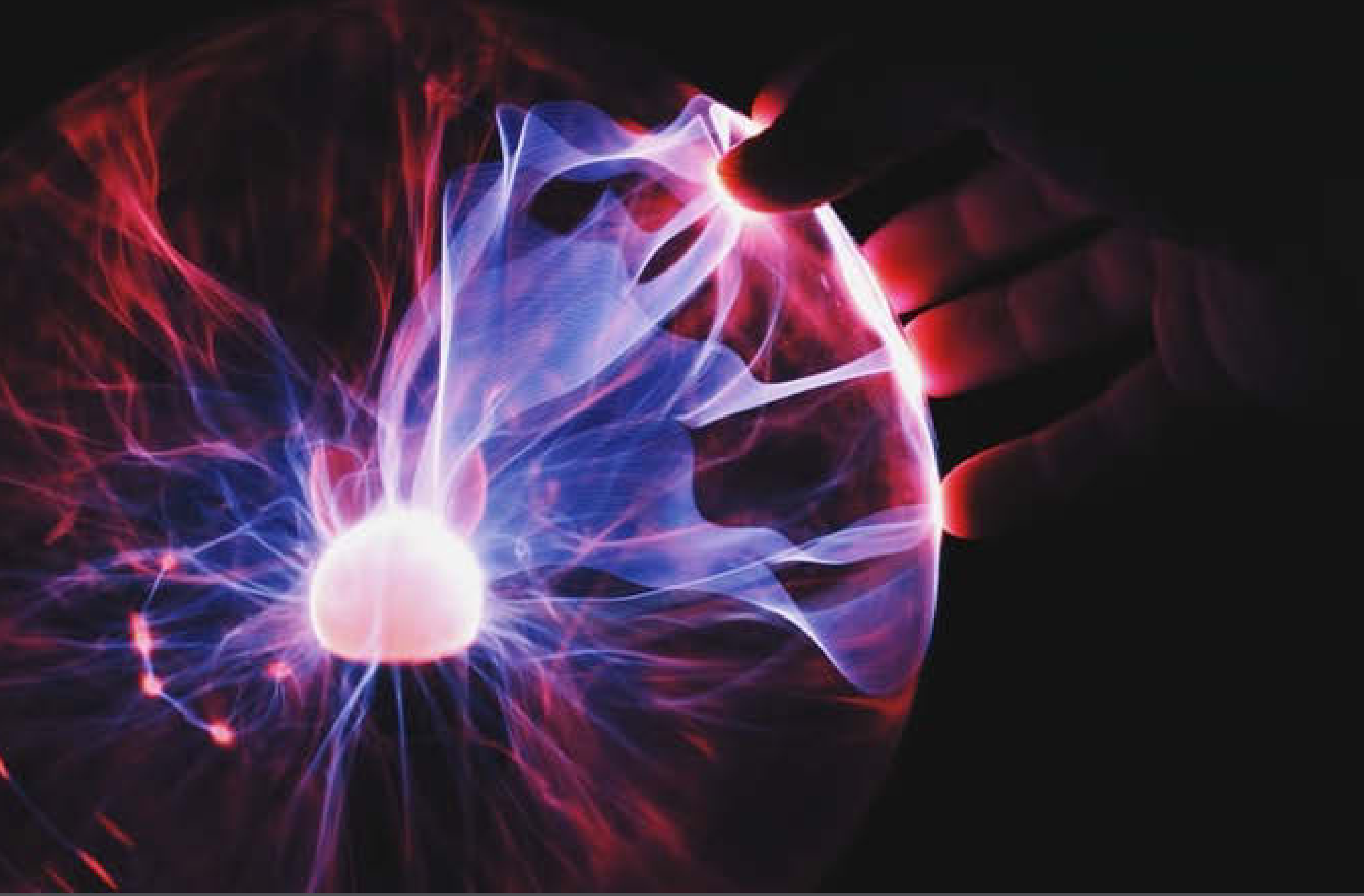
Silent Gen

Born 1946+
Age ≤74

6%

216,000

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



Top TechScape insights 2020

Executive summary

Since 2012, Behaviour & Attitudes (B&A) has been tracking the use of and attitudes towards technology in Ireland. Looking back to that first year of the survey, the specific aspects of Technology measured seem almost quaint, when we marvelled at the fact that more than a third of all adults owned a smartphone, and that one in ten of us had an e-reader or Kindle. Since then, the digital juggernaut has gained an unstoppable momentum, with the pace of adoption of new tech solutions increasing exponentially as each year goes by.

The first aspect of technology we look at from this year's report is remote working, and the extent to which we were prepared to access the office from home before the Covid-19 crisis hit.

You could say that the worldwide workforce has spent the last ten years gently easing itself into home working, with most of us only doing so sporadically up until now. Fast-forward to just a few weeks ago, and vast swathes of the Irish workforce have been consigned to work from their bedrooms for the foreseeable future. The evidence from this year's Sign of the Times survey is that Ireland was in fact reasonably well enabled with the technology required to do so, in advance of the Pandemic striking.

For example, seven in ten of all adults were already regularly using a laptop from home by January of this year. Smartphone ownership had risen to over three million, with practically all of the broad 25 to 49 year old working age cohort owning such a device.

In the qualitative focus groups conducted as part of the research, people spoke of the accepted necessity of maintaining access to the likes of work emails, digital calendars/diaries, etc. at all times, if only to display to their employer how committed they are to work.

There has, of course, been a downside to this 'always on' work ethic. For example, over a third of the population report checking their work emails while on holiday as they feel it is expected of them. More than half check emails last thing at night or first thing in the morning, with a quarter of us admitting that we find it hard to switch off from work in the evening or at weekends.

Our qualitative research module provided us with clear evidence of a move amongst some workers towards re-establishing a clear delineation between work and home life by way of turning off push notifications while at home, removing work emails from their phones, etc. No doubt there has been a scramble to reverse many of these corrective measures in recent weeks as people faced into a prolonged period of e-working.

Over the last number of years our research has consistently pointed up concerns about the growing rift between both people and communities, as they drift away from human interaction towards an increased immersion in virtual realities. It is for this reason that two-thirds of those surveyed tell us that they believe the art of conversation is increasingly being lost, and that a third of the population defer to their phone when in an awkward situation, rather than engage in real human discourse.

Executive summary

People tend to identify technology as the villain which has led to this unravelling of human connectivity. Within this paradigm, it was interesting to observe some of our research participants using terminology more commonly associated with addiction, in discussing technology and its hold over them. For many, the route towards breaking free from this dependency is via a return to a simpler way of living, for example incorporating mindfulness and meditation into their day, tech-free date nights with their partner, and so on.

To facilitate these aspirations, respondents described a range of steps they have already taken to help wean themselves off technology, such as deleting particularly addictive apps, leaving the phone at home on certain days of the week, or simply removing phones from the dinner table to foster family bonding.

Against this backdrop, it will be interesting to see whether the social isolation measures imposed upon us over the course of the current crisis will have resulted in an even greater sense of human and community disconnect, or whether it will have drawn us closer through the shared experience of pulling together to defeat the enemy.

Arguably the most profound theme emerging from our research relates to the extent to which technology has permeated through to all aspects of our everyday lives. Thus far, these roots of technology have extended most pervasively amongst Generation Z (roughly those born between 1997 and 2004), and the Millennials (born between 1978 and 1996). The behaviours displayed by these generations have by now become the norm, with those behind them likely to incorporate future technologies to their daily lives even more enthusiastically, in ways that we have yet to imagine.

To illustrate this point, we only have to look at the use of personal digital devices, which has grown from just 7% of adults in 2018, to 29% this year. At this rate, a majority of us will be wearing a personal tracking device of some sort within two to three years. Currently, these accessories are being utilised as a relatively simple means of providing us with checks and balances on our physical exercise regime. Within the not-too-distant future however, the experts tell us that advances in bio-technology could lead to personal technology generating full medical reports on our health and well-being, diagnosing medical conditions, and prescribing treatment programmes.

Imagine a world where the entire population could be tested for coronavirus through digital devices or implants, problem clusters immediately identified by the health authorities, and preventative action taken to stamp the disease out before it takes hold across the country. Perhaps in five years' time the B&A Sign of the Times survey will be reporting on a shift from technology as lifestyle enabler, to life saver.

B&A | TechScape

Tech Gear

Surge in tech, with growth in:

Tablets 61%

Smart TVs 58%

wearables 29%

eReaders 19%

7 = the average no. of smart devices in the home (10 amongst families with teens/GenZ)

1 in 5 have a smart speaker (2 in 3 use for non-music features, 93% for music)

Smartphone ownership has peaked at 9 in 10. (However, only 40% of those of 74+ yrs have one)

While 81% of us access internet daily it stands at 96% amongst 16-49 yr olds and drops to 62% amongst 50+ yrs

Nation of streamers & bankers

Growth in streaming both legal & illegal:

46% of population feel BB is more important than TV (Dubliners & ABC1 highest)

2/3 Bank online

½ million digital bank users

2/3 Netflix/Amazon Prime

45% Catchup TV

45% Stream music

¾ Watch & listen to YouTube

31% Stream live sports online

3 in 5 Call using WhatsApp/Viber

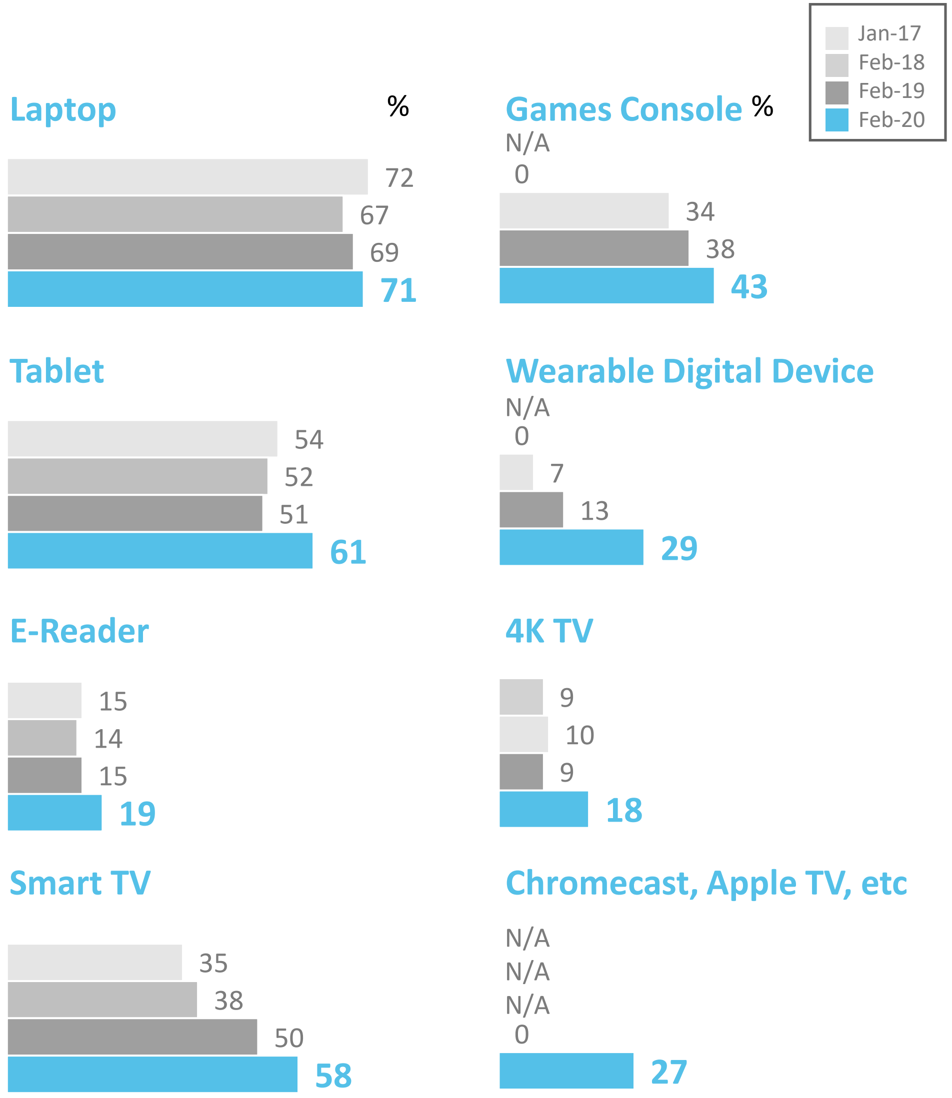
1 in 3 Listen to podcasts

19% game online

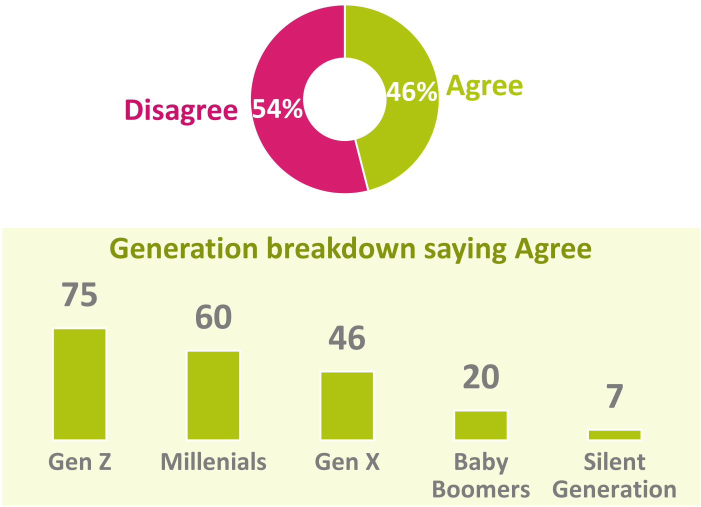
However, a divided society exists, with middle classes and Dubliners more tech geared – consequences for health and switching off.

The results indicate that we were prepared for the home working revolution that occurred when Covid-19 hit our shores

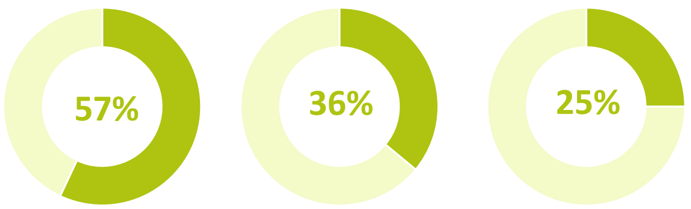
The surge in digital devices



"Broadband is more important to me than TV"



We are 'always on'

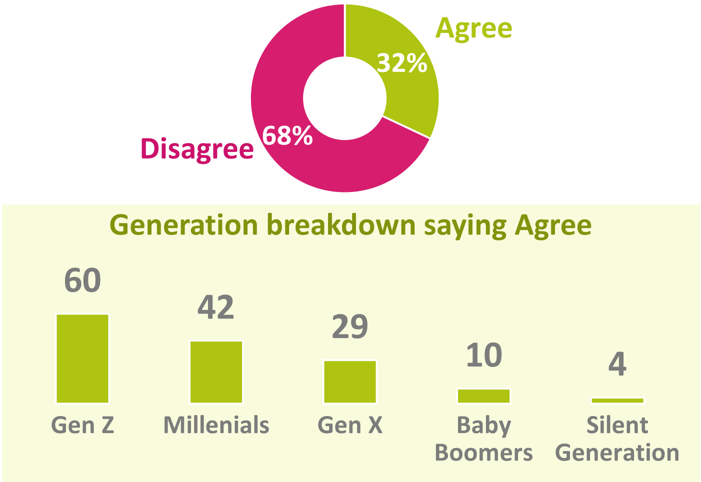


Check emails, text or social media last thing at night or first thing in the morning

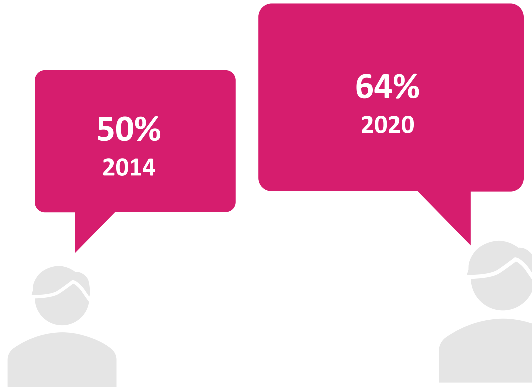
Often check work emails on holiday because they feel it is expected

Find it hard to switch off in evenings and at weekends

"I am watching more content on YouTube than on live TV"



"The art of conversation is increasingly being lost"



Social Animals

Remaining most popular

2 in 3 Use Facebook

2 in 3 Use WhatsApp

Most significant increase (for usage levels)…

43% for Instagram

33% for Spotify

8% for Tik Tok

Static for …

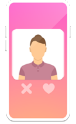
18% for Twitter

19% for LinkedIn

Growth amongst GenZ for:

Instagram	Snapchat	Spotify	TikTok
91%	87%	71%	41%

Just under **1/4** of **GenZ** use a **dating site**



3 in 5 of all adults watch what they post on social media due to data concerns (GenZ girls more than boys)

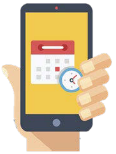
60% of GenZ follow celebs/you tubers/influences (significantly more female)

Social impact of Tech

Mobile is **social crutch** for **1/3** of users. (play/look up stuff in awkward situations)

→ **67%** GenZ

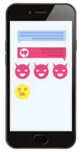
2/3 feel the **art of conservation being lost** (all ages increasingly agree)



Almost **6 in 10** of us are **Always On!** (Checking emails/texts/SM last/first thing). Interestingly, Blue Collar less impacted.

Our inability to switch off has multiplied over the years (particularly check emails on holidays)

1/3 of workers now check emails on hols

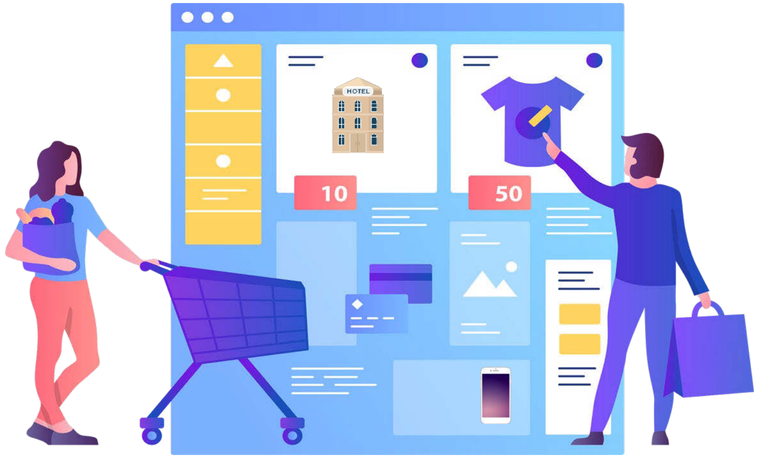


½ of GenZ know someone who has been bullied on Social Media.

½ of GenZ use SM to fit in.

eCommerce

6 in 10 now purchase goods online, significantly higher for under 50s and middle classes (the latter purchase more books, electronics and car hire compared to C2DE).



The core online categories are;

Flights | Hotels | Clothes

3 in 4 GenZ follow brands and also research products online in a store.

Under 50 year olds are driving eCommerce and digital engagement (75% purchase online vs 38% over 50's).

Grocery online purchasing remains at about **1 in 10** of the population (but significantly higher in Dublin).

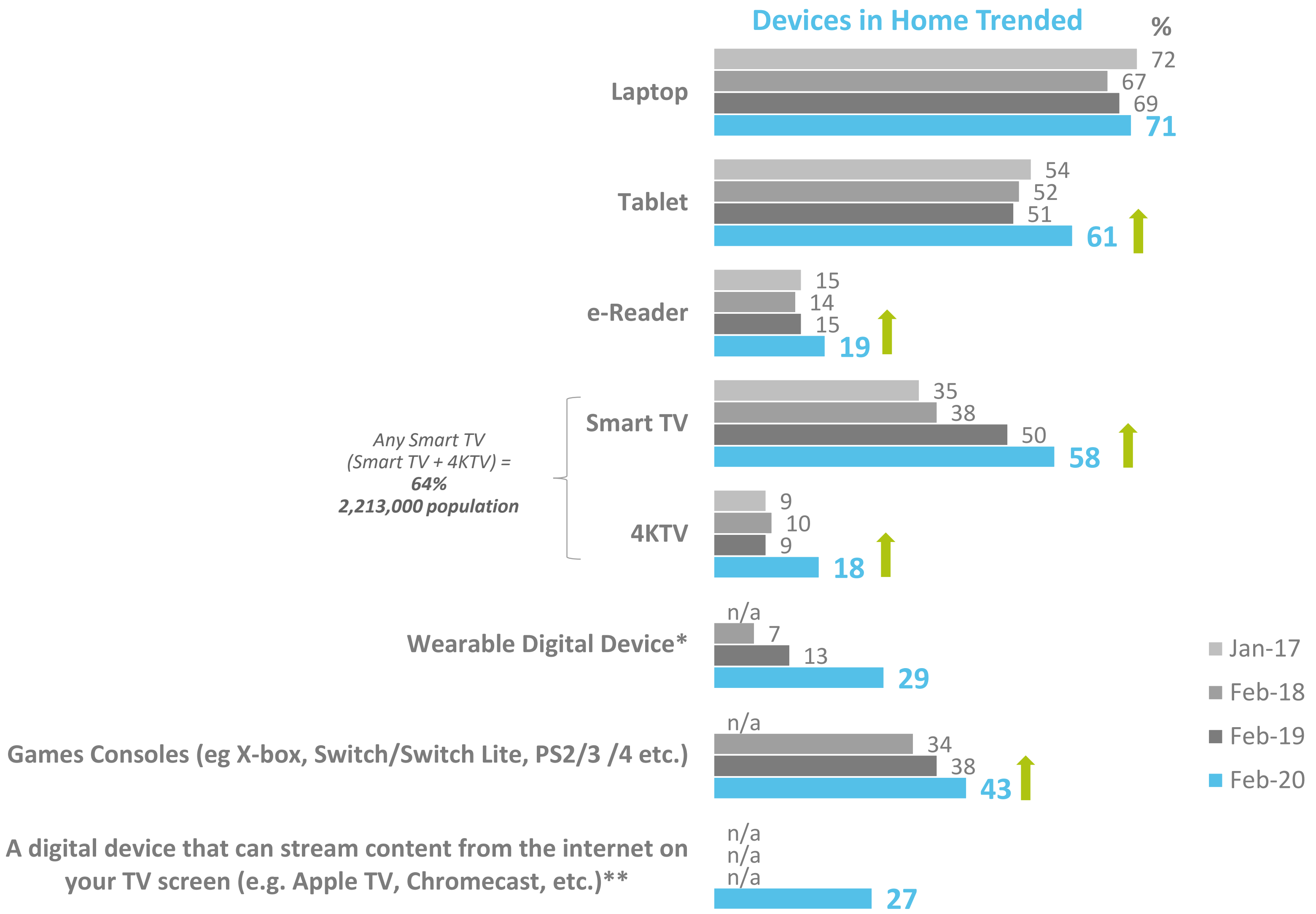
Half of all adults worry about data privacy online.

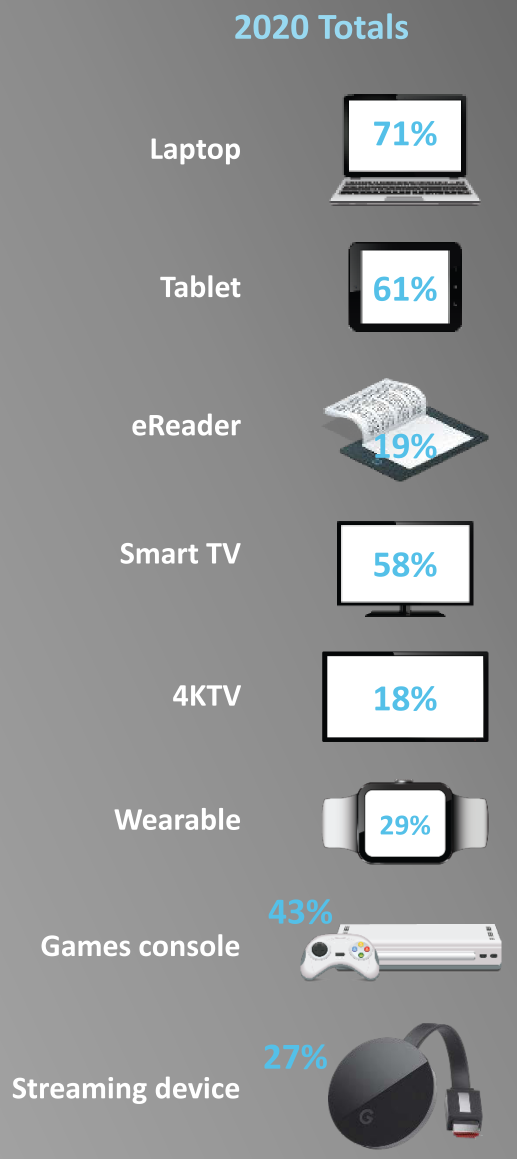
(2 in 3 millennials)

Tech gear

A surge in Tech evident in 2020 with Smart TVs, Tablets and especially wearable devices growing. Even e-readers have seen an increase over the last year

Base: All adults aged 16+ - 934





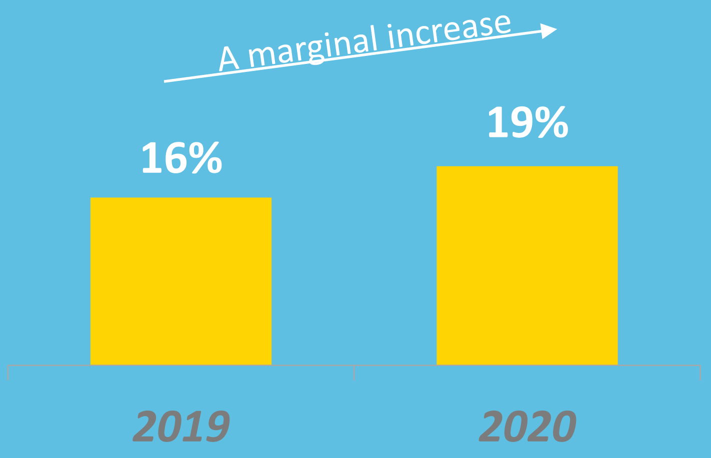
*Added 2018 **Added 2020

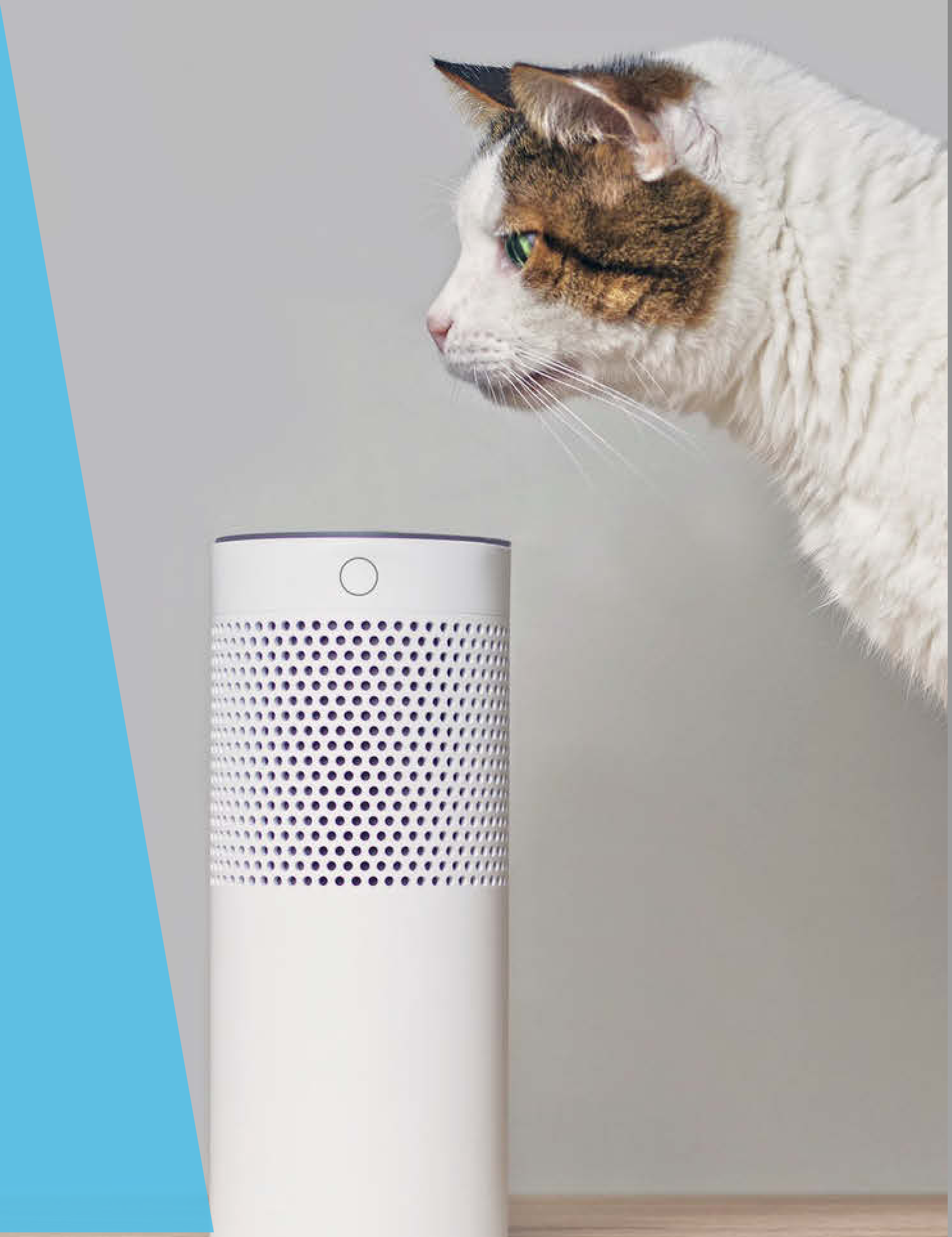
Which of the following devices do you currently use?

Other tech in the home

1 in 5 (19%)

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



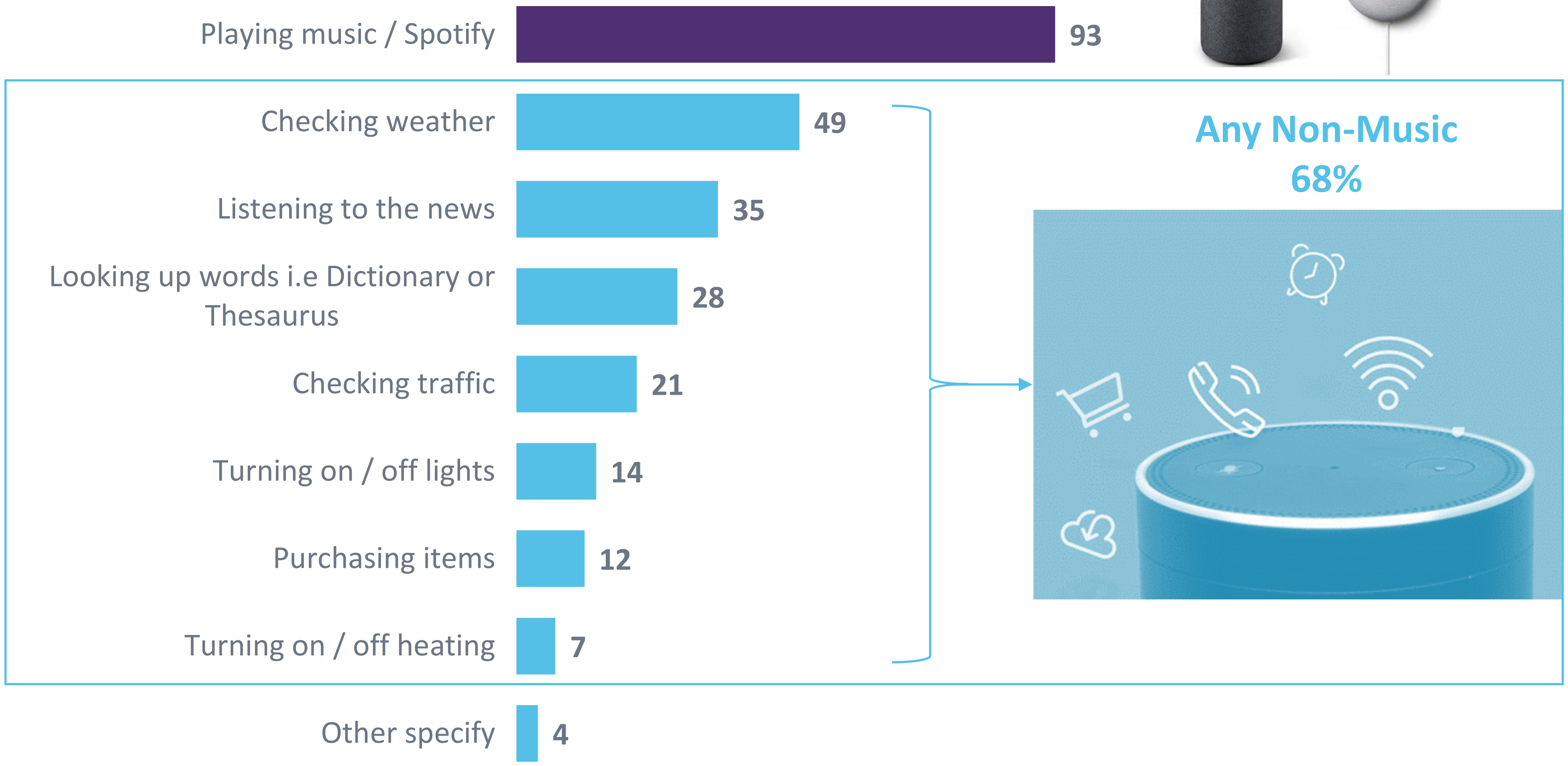


Generations

	Gen Z	30%
	Millennials	23%
	Gen X	18%
	Baby Boomers	10%
	Silent Gen	4%

The use of smart speakers (i.e. Alexa, Google Assist/Home): Primarily music, but 68% do something else on their speaker

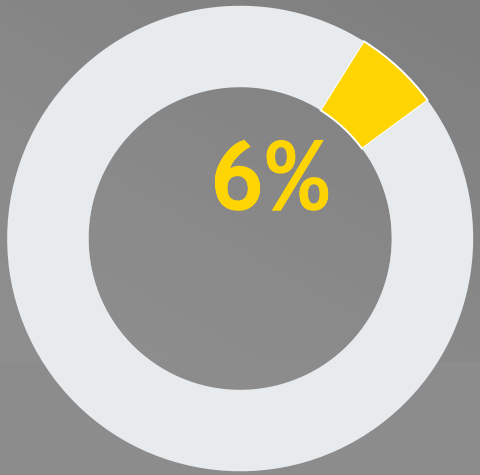
Base: All with Smart speakers (e.g. Amazon Alexa, Google Assist/Home etc.) 176



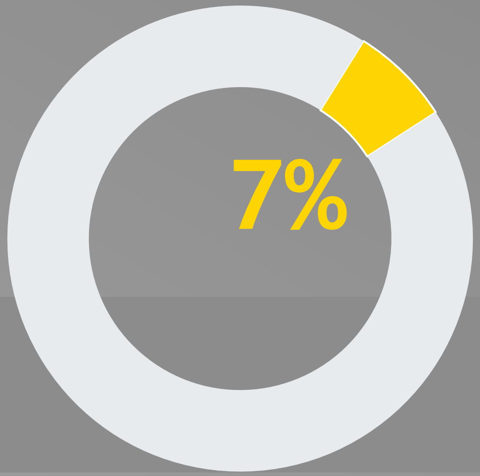
Age category in the household that uses these Smart speakers	
UNWTD	*176*
	%
Under 12	20
12-17 years	26
18-24 years	**36**
25–34 years	**40**
35–44 years	28
45–54 years	24
55–64 years	16
65 years +	5

Q.2b For which of the following do you use the smart speakers (i.e. Alexa, Google Assist/Home etc)?

Other Tech in the home



VPN/Proxy server



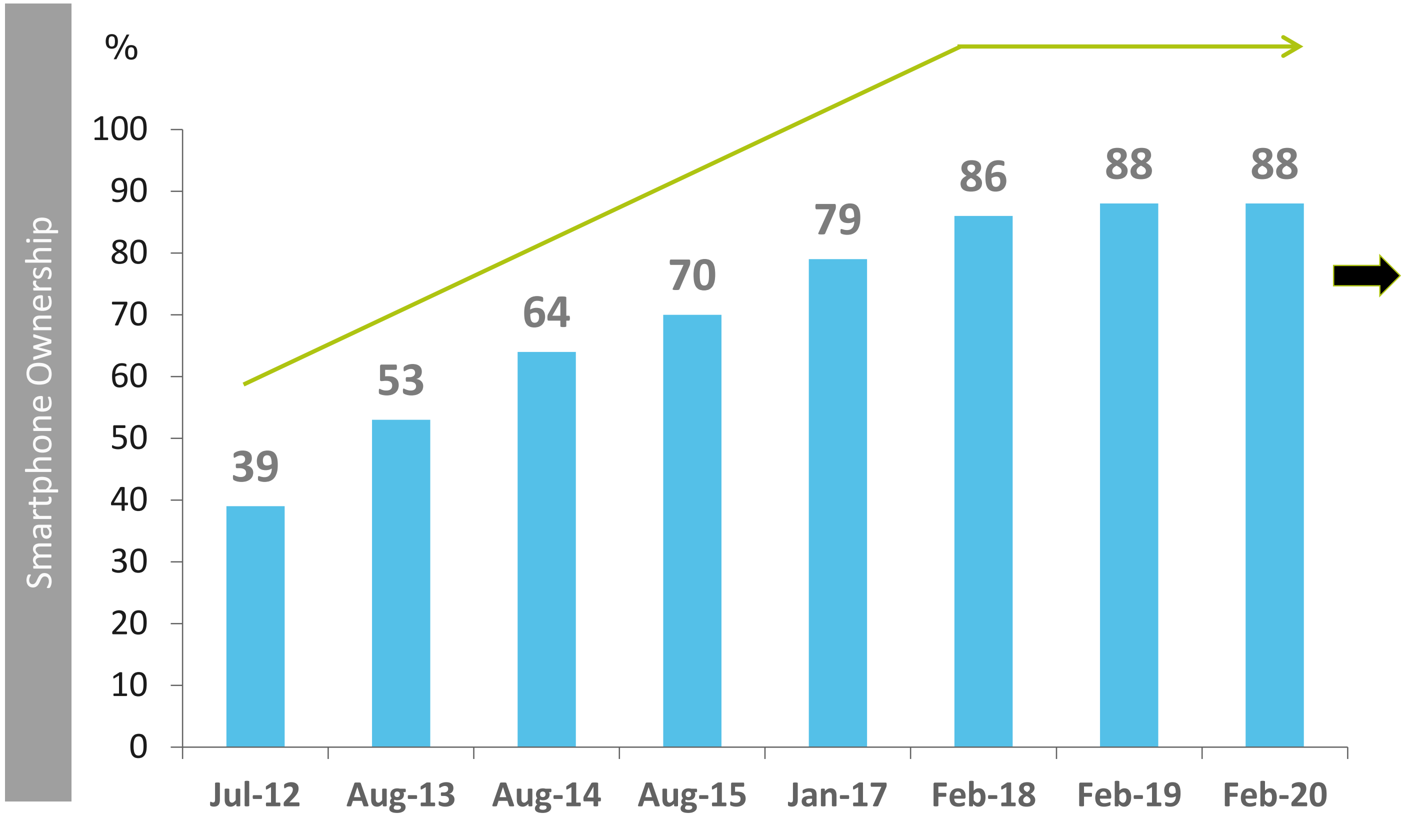
Smart home heats devices (e.g. Climote, Hive, Nest etc.)

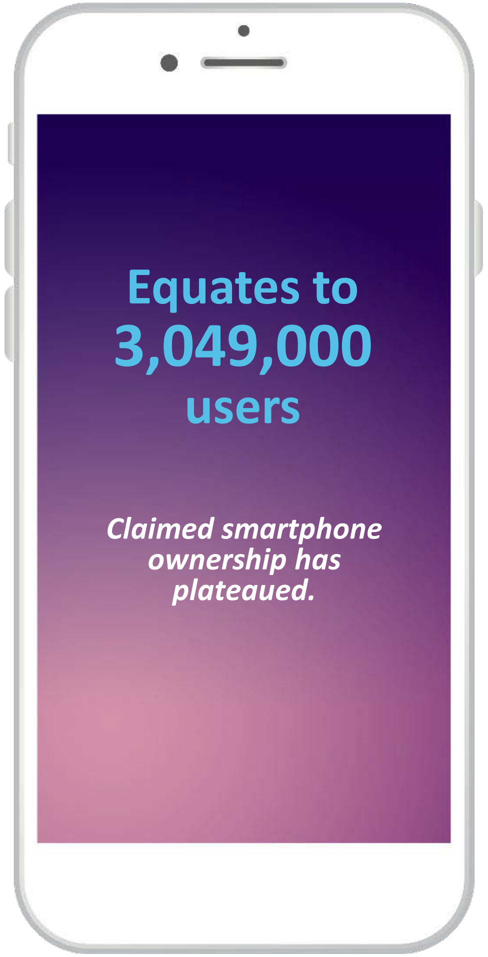
Generations

	VPN/ Proxy Server	Smart home heats devices (e.g. Hive/Nest)
 Gen Z	8%	5%
 Millennials	7%	9%
 Gen X	6%	9%
 Baby Boomers	3%	4%
 Silent Gen	3%	3%

Almost 9 in 10 mobile phone users now have a smart phone:
40% among the silent generation (those aged 74 years+)

Base: All with mobile - 934





Generations


Gen Z 99%


Millennials 98%


Gen X 92%


Baby Boomers 74%

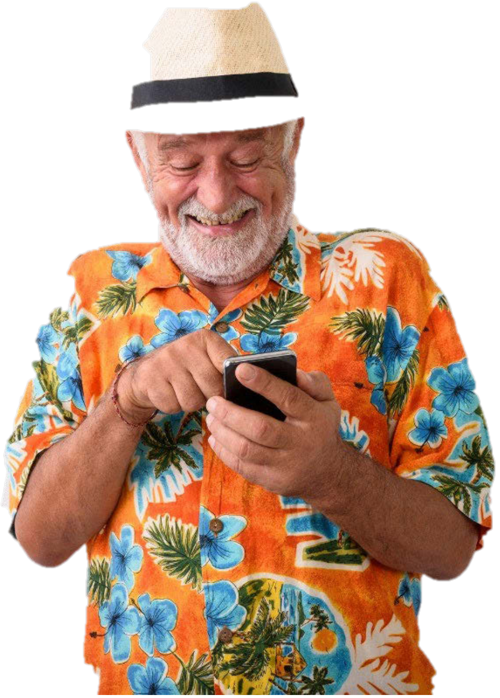

Silent Gen 40%

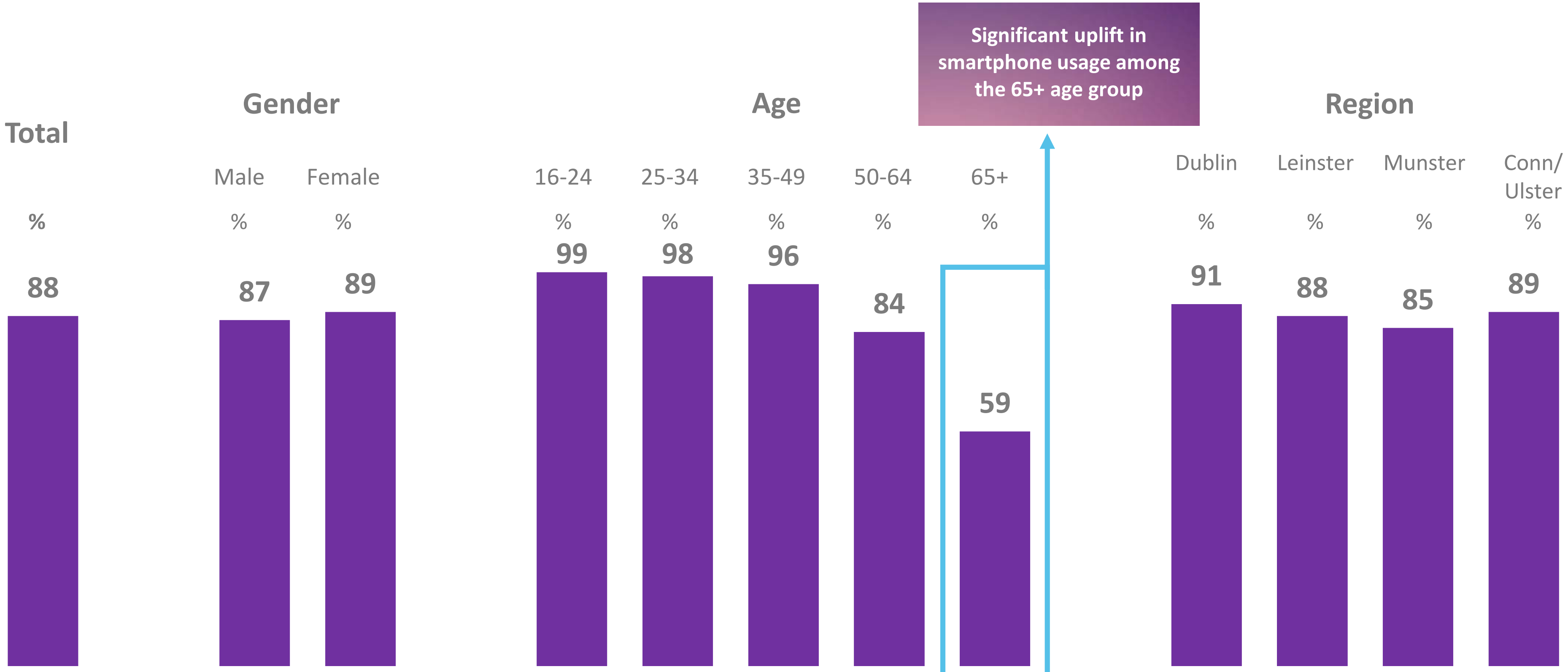
Pre-January 2017 comparable data from eir Connected Living Survey 2015

Which of the following devices do you currently use?

Smartphone ownership among the over 65s is increasing

Base: All with mobile - 934





	Total	Male	Female	16-24	25-34	35-49	50-64	65+	Dublin	Leinster	Munster	Conn/ Ulster
% 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
% Aug '13	53	54	52	81	70	55	32	13	61	51	47	51

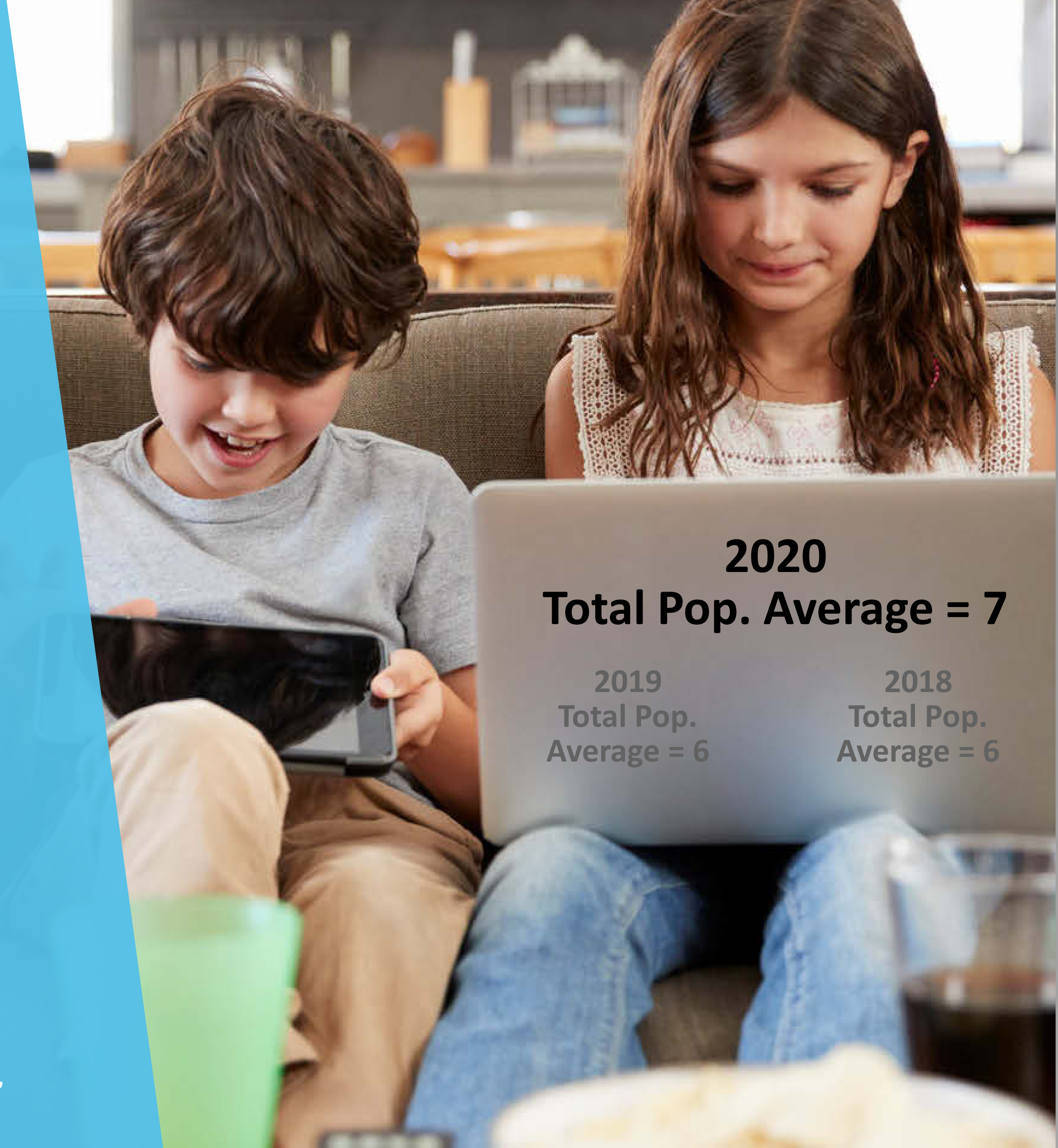
All under 50s with a mobile phone now have a smartphone, and smartphone ownership among the over 65s is increasing steadily.

Which of the following do you use nowadays?

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

B&A

Families with teenagers have an average of 10 SMART* devices at home



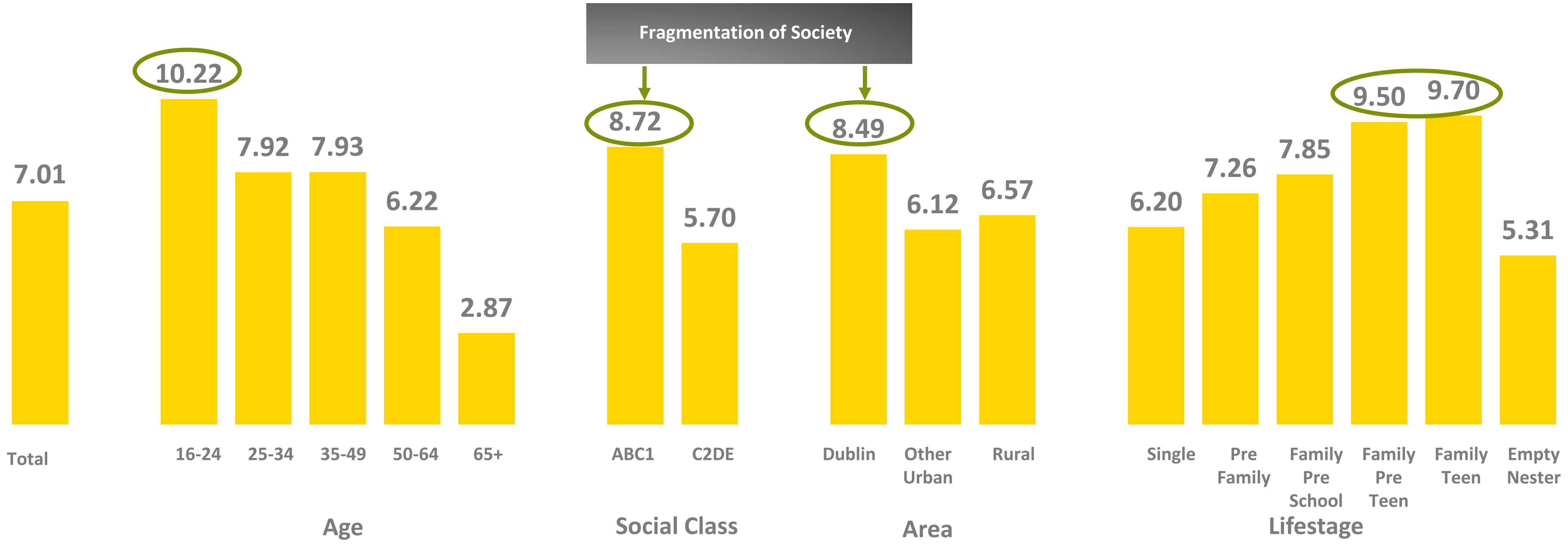
Generations (Average No.)

Gen Z	10
Millennials	8
Gen X	8
Baby Boomers	5
Silent Gen	2

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

On average, Irish homes have access to 7 smart devices* at home

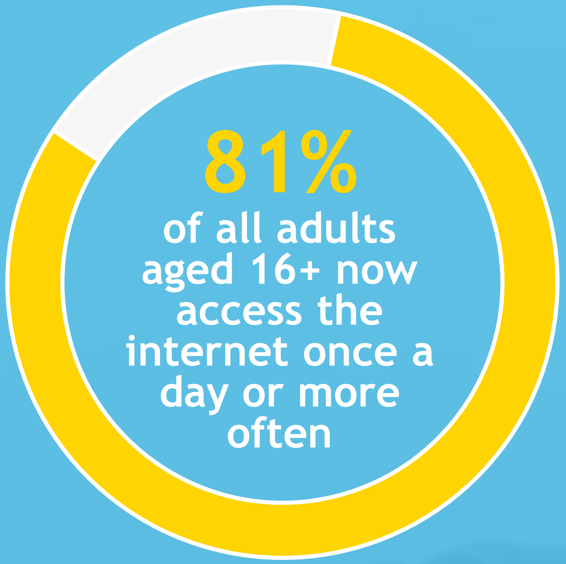
February 2020



Dubliners and Family Teen lifestage have access to the highest number of potential on-the-go devices, followed by Family Pre Teen.

And how many are in the household?

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



26%

Of those 74 yrs+ (Silent Gen)

now access the internet once a day or more often.

11% of population never access the internet

B&A

Generations

	Gen Z	98%
	Millennials	96%
	Gen X	86%
	Baby Boomers	59%
	Silent Gen	26%

4 in 5 of us access the internet once a day or more often

Base: all Adults 16+ - 1,001

The use of Generational terms such as Baby Boomers etc., mask the age differences. 96% daily usage aged 16-49, while it drops to 62% amongst those aged 50+ years.

% 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
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
*Aug '14	69	71	68	96	91	81	44	26	79	61	78	73	65	64	74		62

Note: 11% of the population still never access the internet (44% amongst 65+ age cohort, 61% amongst those 74 years+ - see Appendix).

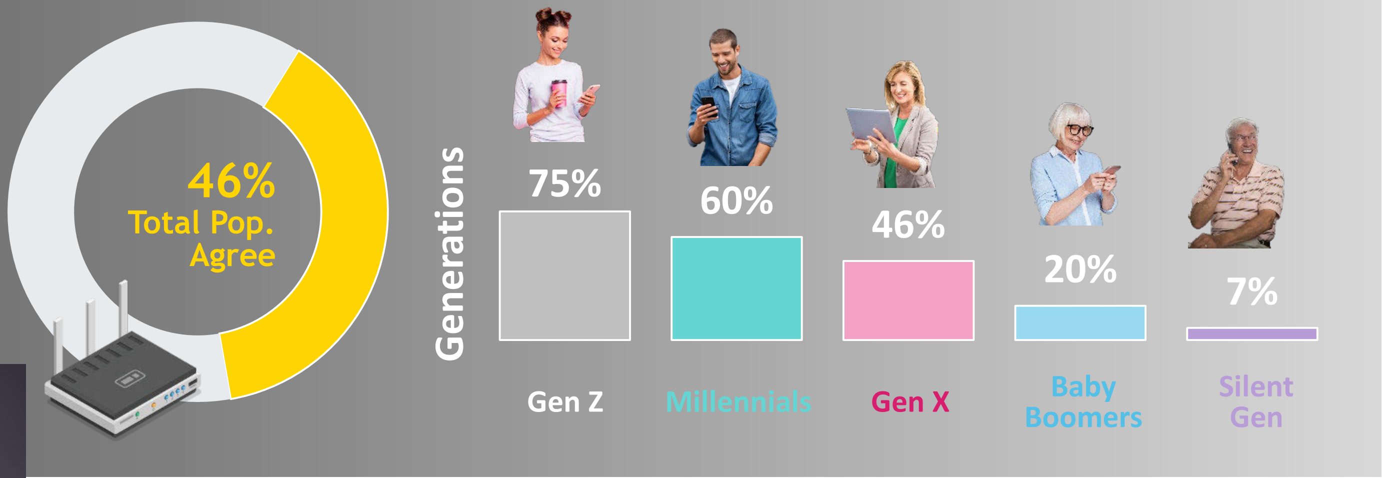
How often do you yourself access the internet nowadays?

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

A nation of streamers and bankers online (entertainment & comms)

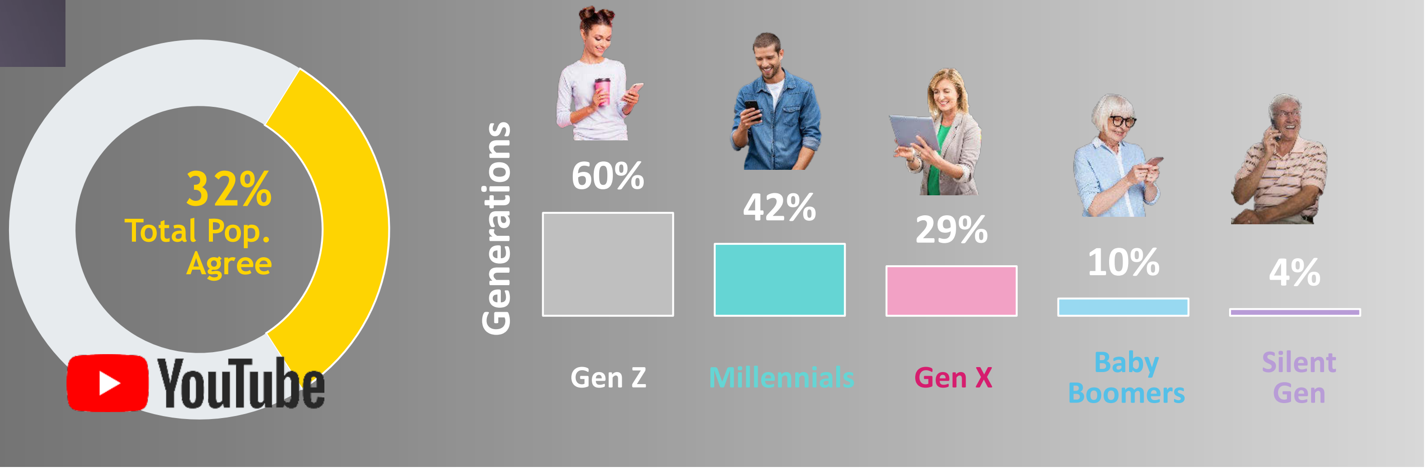
For GenZ and Millennials, BB is more important than TV, with platforms such as YouTube attracting viewership. *N.B. These generations still watch TV*
It does point to content being king

Broadband is more important to me than TV



However, remember on average, 2,442,700 Adults 15+ tuned into TV daily in 2019*

I am watching more content on YouTube than on live TV

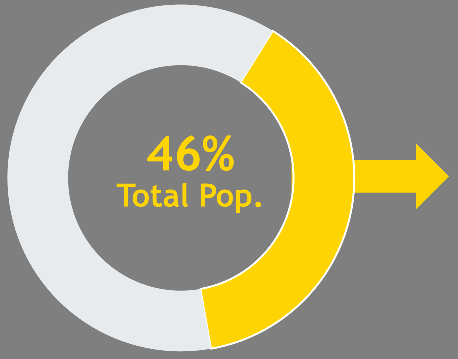


***Source: TAM Ireland / Nielsen, Based on Total TV, National, Consolidated, 1st January - 31st December 2019, Reach 000s 1+ Consecutive Minutes**

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

Let us not lose sight of demographics. There is clear divide exists between Dublin: outside and middle class (ABC1): blue collar (C2DE). Dubliners and middle class people have a great affinity with BB (and other tech). This impacts what they use in the home, what they watch and what they interact with.

Broadband is more important to me than TV



Social class

ABC1 57%

C2DE 38%

Region

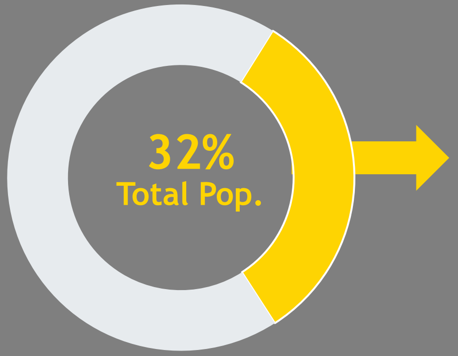
Dublin 43%

Other urban 26%

Rural 27%

I am watching more content on YouTube than on live TV

YouTube



Social class

ABC1 38%

C2DE 27%

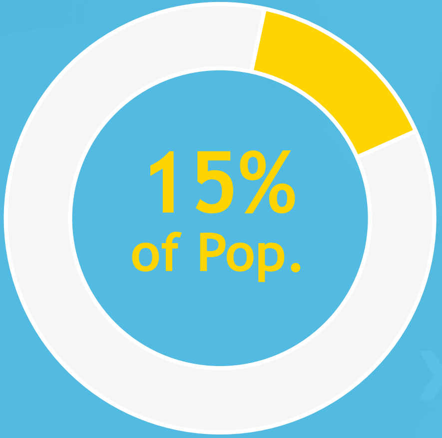
Region

Dublin 57%

Other urban 45%

Rural 38%

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



Now over half a million Digital Product/Bank users exist in Ireland

(e.g. Revolut, N26, Monzo).
Dirven by middle class and Dubliners

Region

Dublin
23%

Rural
12%

Social class

ABC1
24%

C2DE
8%

B&A

Generations

Gen Z 27%

Millennials 22%

Gen X 10%

Baby Boomers 5%

Silent Gen -

Growth in online usage for both entertainment and communications
Key Highlights: Surge in paid and other streaming and digital banking

Base: All adults 16+ - 1,001

Entertainment

(66%) **73%**
Watch or listen to content on YouTube

Either = 64% (so Netflix people have Amazon Prime)

(51%) **63%**
Watch Netflix

(7%) **16%**
Watch Amazon Prime

(42%) **45%**
Use catch-up TV services like RTE Player, TV3 Player, All4, Virgin and Sky On Demand etc on mobile/laptop/TV or other devices

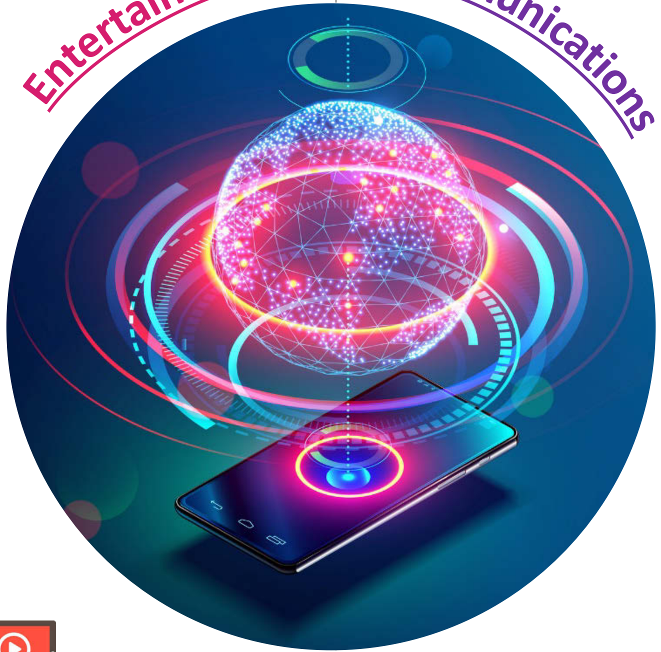
(36%) **45%**
Stream music, via Spotify, Youtube, etc

(24%) **31%**
Watch or stream live sports or other events online

(22%) **29%**
Listen to Podcasts

(17%) **21%**
Watch/stream movies/shows etc. via sites such as Showbox, Putlocker , etc.

(18%) **19%**
Play Games online with others



Communications

75% (67%)
Use personal email

69% (64%)
use instant messaging - WhatsApp, Facebook Messenger, Snapchat, Viber, Discord, Skype etc.)

66% (57%)
Online banking (e.g. your banking website app or login to their website)

60% (57%)
Call someone using WhatsApp, Viber, etc.

42% (38%)
Skype/Facetime or other video calling

31% (24%)
Use cloud applications (e.g. WeTransfer, One Drive, Dropbox, iCloud, Google Drive, Evernote etc.)

15% (n/a)
Digital financial products/banks such as Revolut, N26, Monzo

Which of these do you do nowadays anywhere?

( ) = Brackets relate to 2019

Social animals

Facebook and WhatsApp remain the most popular social media and OTT services used in 2020

Base: All Adults 16+ - 1,001

	2019	Feb 2020	Change vs 2019
	%		%
Facebook *	68	68	=
WhatsApp	65	68	+3
Instagram *	35	43	+8
Spotify	26	33	+7
Snapchat *	29	31	+2
Viber/ Viber Messenger	30	30	=
LinkedIn *	18	19	+1
Twitter *	20	18	-2
Pinterest *	12	16	+4
Sound Cloud	9	10	+1
TikTok	0	8	+8
Tinder +	5	5	=
Reddit	5	3	-2
Bumble +	1	2	+1
Plenty Of Fish +	2	2	=0
Tumblr	4	2	-2

Instagram, Spotify and TikTok usage has increased most significantly over the past year (+7%-8%)

***Any Social Media usage nowadays =**

74%

(73% in 2019)

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

Pre-January 2017 comparable data from eir Connected Living Survey 2015
Reddit, Plenty of Fish and Bumble added in 2018
** = Social media + = Dating Sites*

22%

of GenZ are on at least one dating site

However, more are on TikTok

41%

Dating Site Generations

	Gen Z	22%
	Millennials	8%
	Gen X	3%
	Baby Boomers	1%
	Silent Gen	-

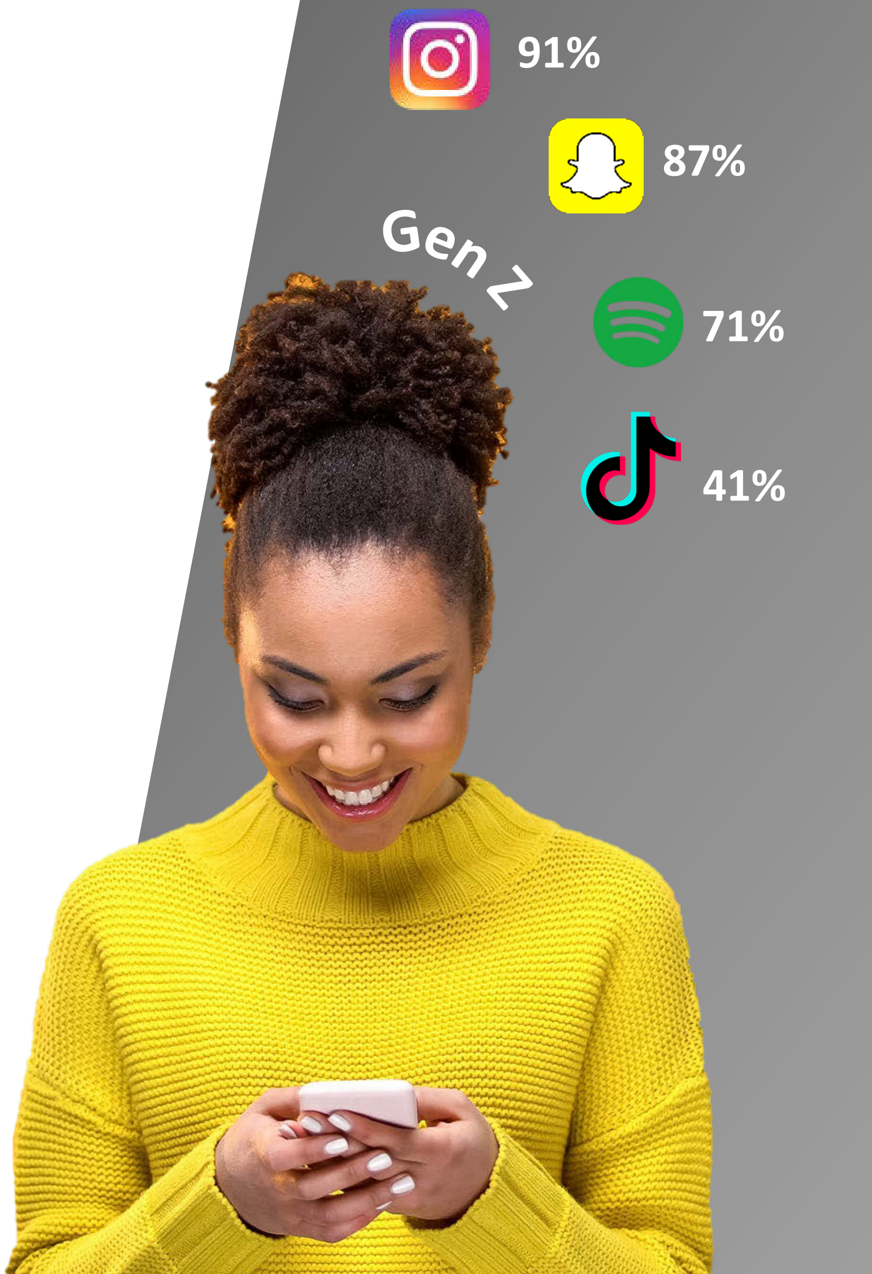
Facebook, Instagram, WhatsApp and Snapchat most used social networks and OTT services among 16-24 year olds. However most growth for: Instagram, Snapchat, Spotify and TikTok

Base: All 16-24s -61

	2019 %	Feb 2020 %	Change vs 2019 %
Facebook *	94	95	+1
Instagram *	78	91	+13 ▲
WhatsApp	83	89	+6
Snapchat *	73	87	+14 ▲
Spotify	61	71	+10 ▲
Viber/ Viber Messenger	48	46	-2
Twitter *	40	41	+1
TikTok	0	41	+41 ▲
LinkedIn *	27	34	+7
Pinterest *	30	32	+2
Sound Cloud	30	25	-5
Tinder +	20	19	-1
Reddit	13	14	+1
Tumblr	12	13	+1
Bumble +	5	10	+5
Plenty Of Fish +	3	2	-1

** = Social media*
+ = Dating Sites

B&A

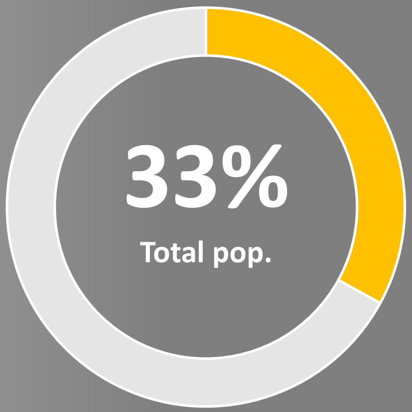


Which of the following, if any, of these do you ever use nowadays?

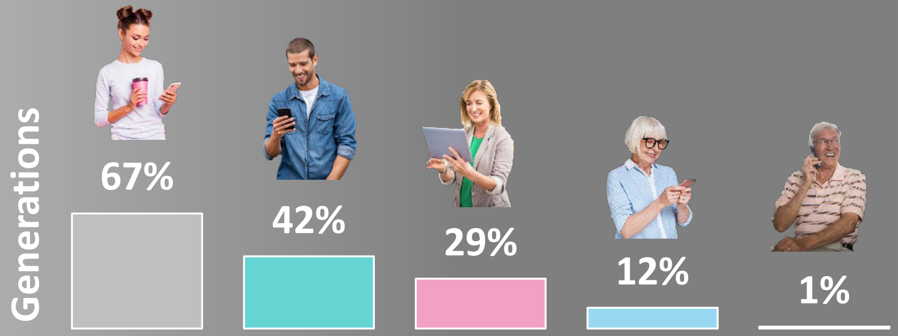
Social impact of tech

Oh no … our mobile is now a social crutch!

Base: All adults 16+ - 1,001

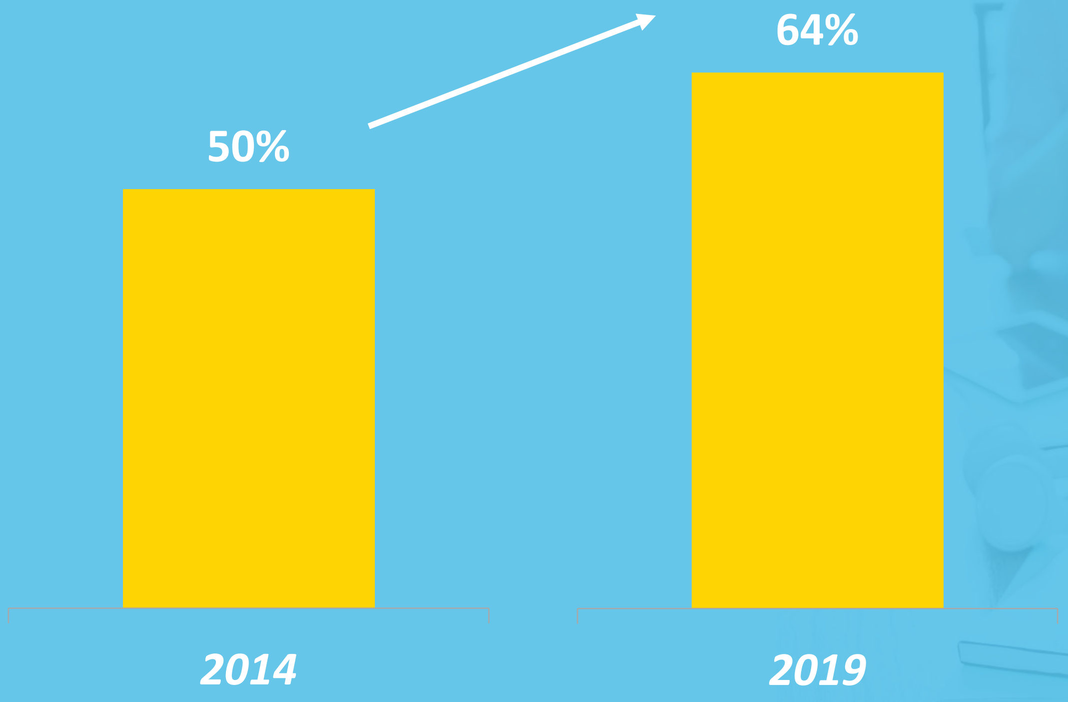


Play or look stuff up on their mobile phone when feeling awkward or in awkward situations with people



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

The art of conversation is increasingly being lost

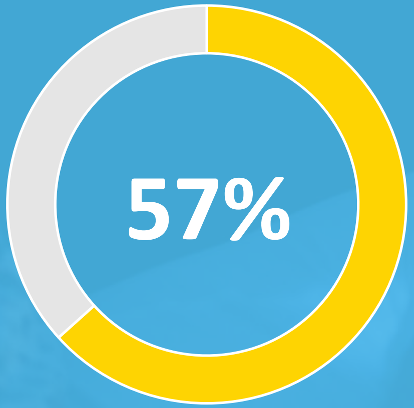


Age

	2014	2020
	%	%
16-24	37	47
25-34	50	61
35-49	51	68
50-64	57	67
65+	55	69

All ages are increasingly thinking this!

Always On!



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

Up from 46% in 2019

Generations


Gen Z 69%


Millennials 61%


Gen X 52%


Baby Boomers 38%


Silent Gen 22%

Interestingly blue collar (C2DE) less impacted. More likely to be more blue collar trades and having less tech.

Base: All Adults 16+ who use SM (708)

Our inability to switch off has multiplied over 7 years!

Base: All adults 16+ 1,001

To what extent do you agree or disagree ….

The addiction and dark side of social media and communications is clear

Base : Use Social Media Sites 708

= Significantly higher = Significantly lower

	Total	Gen Z	Millennials	Gen X	Baby Boomers	Silent Gen
		111	293	146	137	15
	%	%	%	%	%	%
* Any check email/messages (anytime)	57	69	61	52	38	22
I'm getting tired of Facebook and other social media	52	42	57	54	44	40
* The first thing I do in the morning is check emails, text messages, or social media sites	48	63	51	42	33	18
* The last thing I do at night is check emails, text messages or social media sites	47	63	51	42	27	22
I can't imagine my life without social media	40	64	39	29	29	18
I would rather not be on social media but I am afraid of missing out on what's going on around me	37	47	38	37	25	22
I use social media sites in order to fit in with my friends / peers	37	47	41	31	23	20
I'd hate to be the type of person who only has a few friends on social media such as Facebook	29	43	29	26	18	15
I know someone who has been bullied on social media	27	48	27	21	14	5
I have been personally bullied on social media	9	14	10	4	5	5

FOMO and fitting in also evident

However, there is a dark side

More likely in Dublin 17% (vs. outside 5%)

All those who are working

Q.7 *Here are some other things people have said about social media. Do you agree with these statements?*

eCommerce

Growth in online purchasing, but what are we buying online?

B&A

Flights
86%
(83%)

Hotel bookings
82%
(80%)

Clothes/ shoes
80%
(76%)
(89% Female)

Electric goods
40%
(48%)

Car hire
33%
(38%)

Music/film downloads /CD/DVDs/ TV shows
40%
(36%)

Magazine/ Book
31%
(32%)

Computer games
23%
(27%)

Groceries
16%
(10%)
(24% Dublin)

Pharm drugs/ medicines
9%
(10%)

BUY

Base: All adults that purchase online – 2020 599/2019 507

61%
(52%)
purchase Online

Online purchases Generations

Gen Z 76%

Millennials 79%

Gen X 60%

Baby Boomers 38%

Silent Gen 19%

Three core categories now exist: flights, hotels and clothing.

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

( ) = 2019

Who really purchases online?

Base: all Adults 16+ - 1,001

Gen Z more likely also to buy (in addition to flights etc); clothes, downloads, games

In addition to the top categories, more likely to buy; care hire, electronics and books online than blue collar.

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

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

Among those who share posts online (48%), the average number of weekly posts is

6

Base: All who post online n = 447

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

B&A

Generations

Gen Z	6
Millennials	6
Gen X	8
Baby Boomers	5
Silent Gen	3



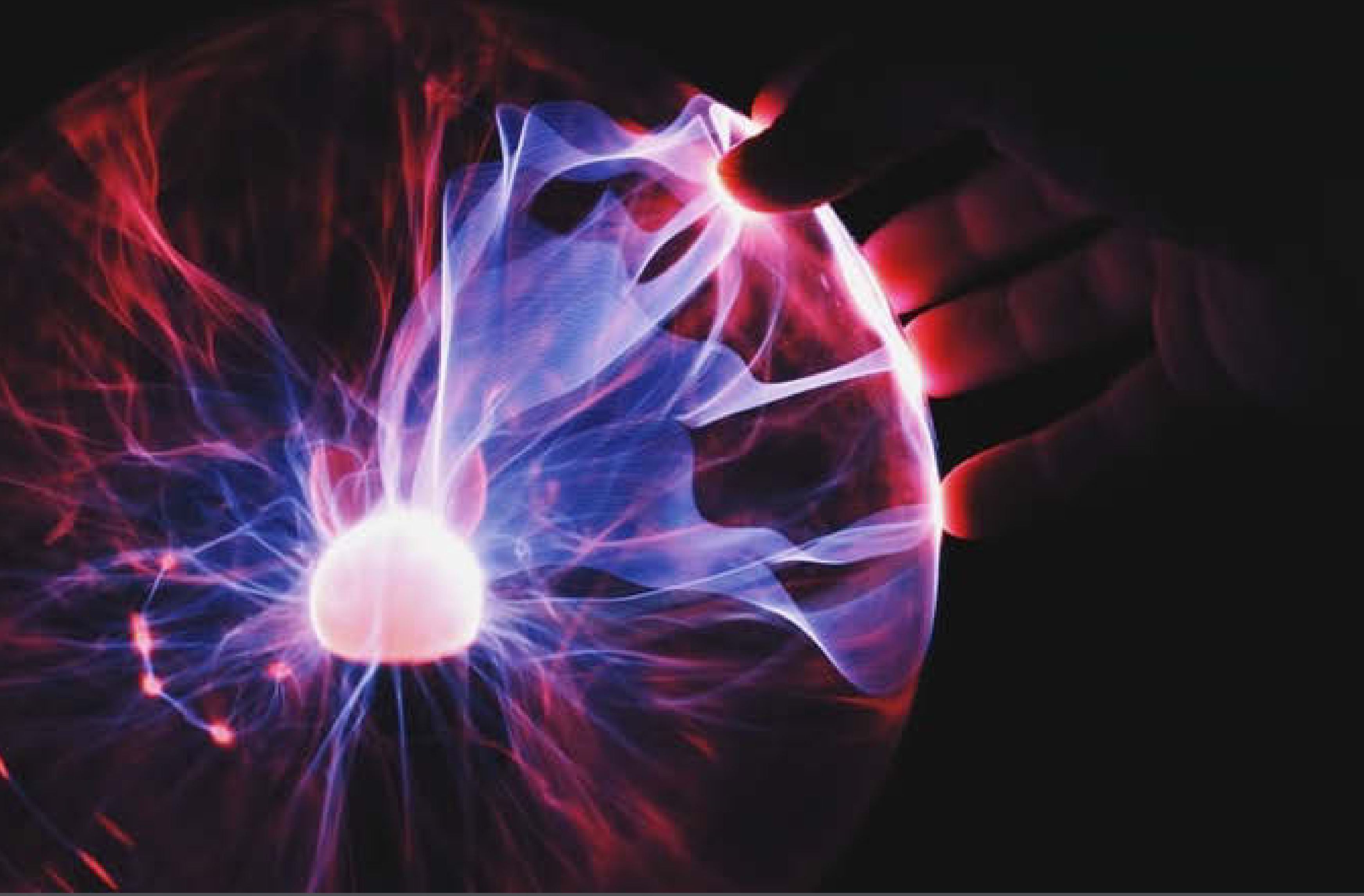

52%

Worry about data privacy online

(Peaks amongst 25-49 year olds and those with children and Millennials).

Generations

Gen Z	54%
Millennials	64%
Gen X	54%
Baby Boomers	39%
Silent Gen	19%



Parting thoughts

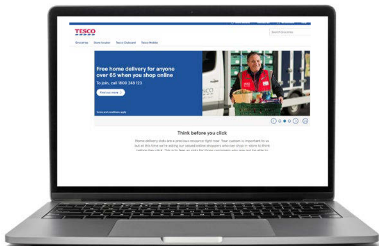
Covid-19 & tech

Our need for tech during this crisis will have accelerated:

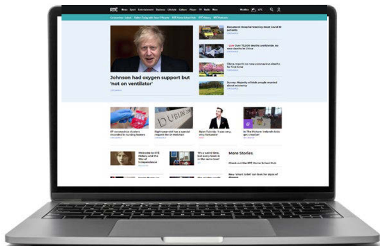
Home working
(Microsoft Teams, Zoom)

Entertainment
(Disney+, Netflix, Amazon Prime, Now TV kids)

Socialising
(Google Hangouts, Google Duo, House Party)



Shopping
(Tesco, SuperValu, Amazon, Harvey Norman)



News
(rte.ie, journal.ie)

As we emerge from this national emergency and rebuild our lives, the question will centre around **what behaviours will we maintain** and to what extent will the primal human need for social contact flower again.

Will Ireland be as **physically social again**? We think so, but **with a tech twist**. Thus, we will likely have more virtual meetings for work, more online shopping, but less virtual drinking!

What does the future hold?

Perhaps in five years' time the B&A Sign of the Times survey will be reporting on a shift from technology as lifestyle enabler, to life saver.

Thank you.

RESEARCH
& INSIGHT

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

Delve Deeper