



RESEARCH  
& INSIGHT

# TechScape 2020



@banda\_ie



behaviour&attitudes



behaviour&attitudes



info@banda.ie



Tel: 01 205 7500

[www.banda.ie](http://www.banda.ie)

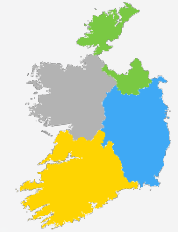




# Introduction



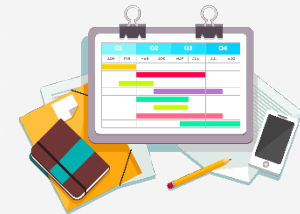
TechScope is conducted on our face-to-face CAPI Omnibus amongst a fully representative sample of 1,000 adults aged 16+ years.



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.

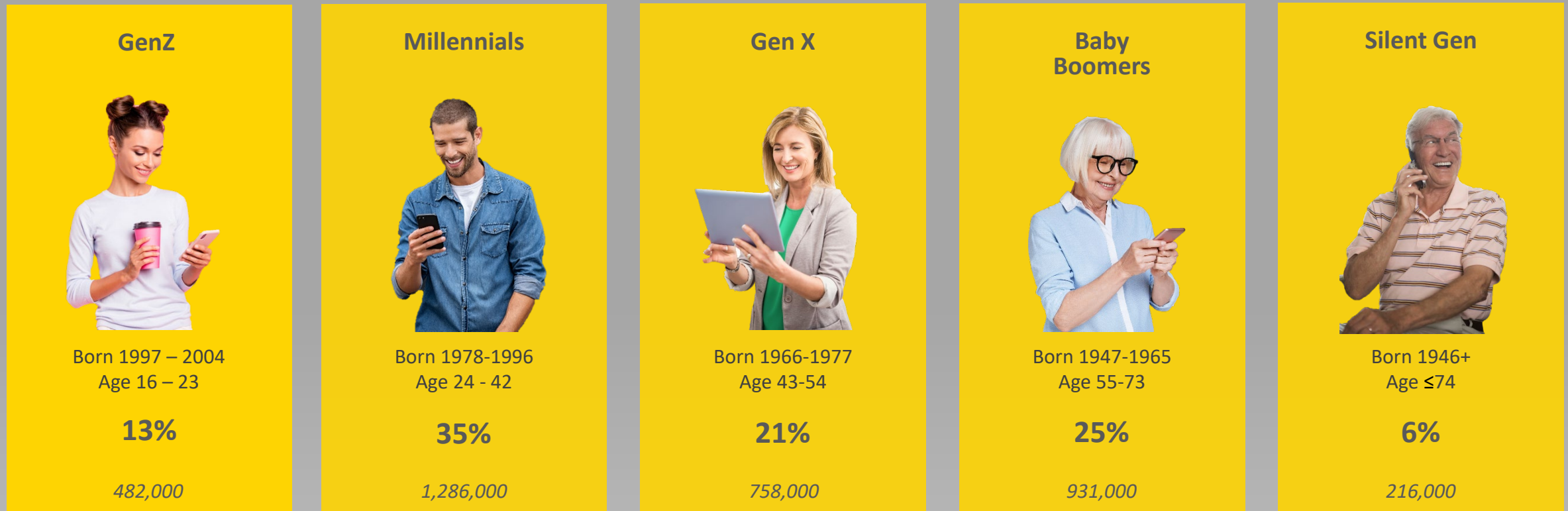


The fieldwork for this study was conducted between the 18<sup>th</sup> and 29<sup>th</sup> January 2020.

# 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:



*'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.

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.

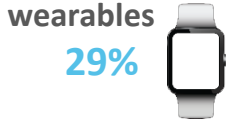
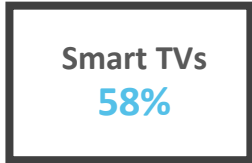
To illustrate this point, we only have to look at the use of personal digital devices, which has grown from just 7% of adults in 2018, to 29% this year. At this rate, a majority of us will be wearing a personal tracking device of some sort within two to three years. Currently, these accessories are being 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.



## Tech Gear

Surge in tech, with growth in:



**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



**1/2 million digital bank** users



**2/3** Netflix/Amazon Prime



**45%** Catchup TV



**45%** Stream music



**3/4** Watch & listen to YouTube



**31%** Stream live sports online



**3 in 5** Call using WhatsApp/Viber



**1 in 3** Listen to podcasts

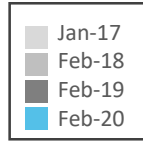
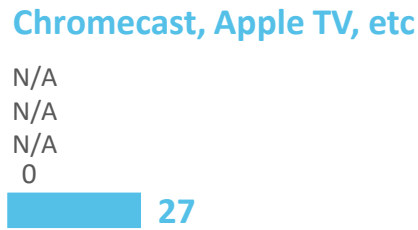
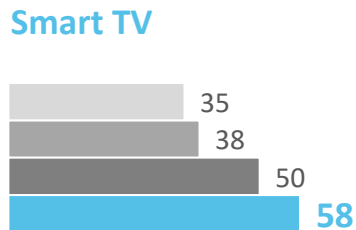
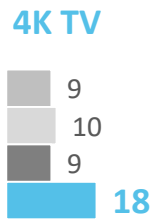
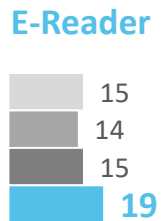
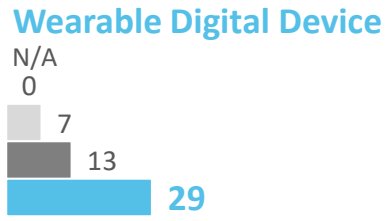
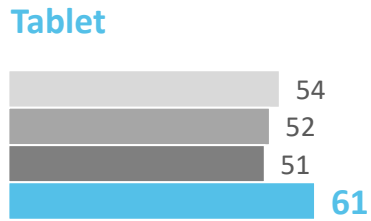
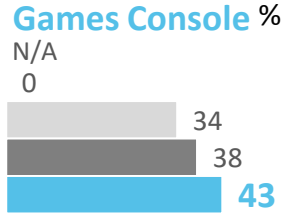
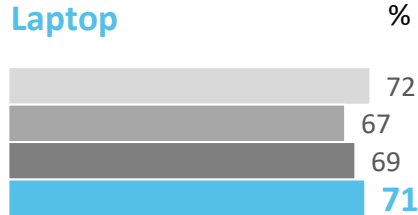


**19%** game online

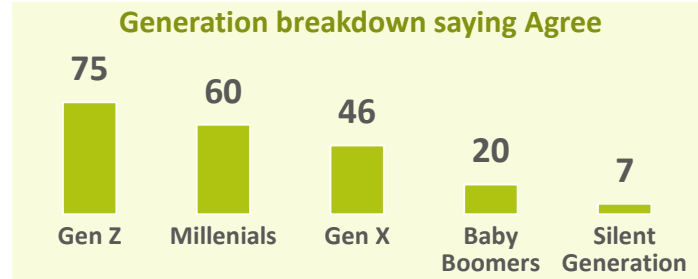
However, a divided society exists, with middle classes and Dubliners more tech geared – consequences for health and switching off.

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

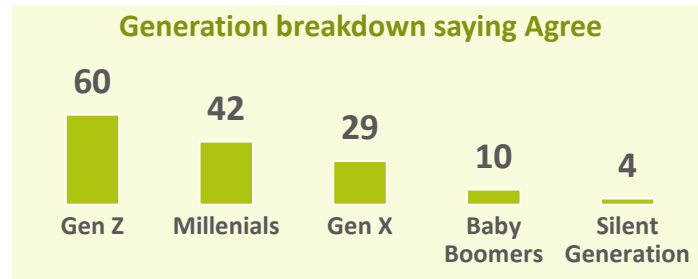
## The surge in digital devices



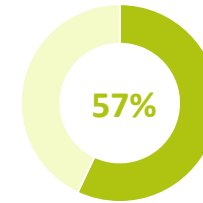
## "Broadband is more important to me than TV"



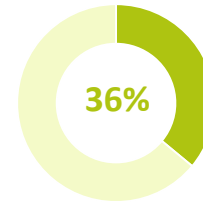
## "I am watching more content on YouTube than on live TV"



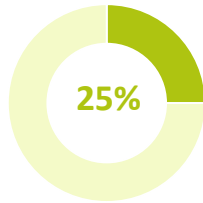
## We are 'always on'



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

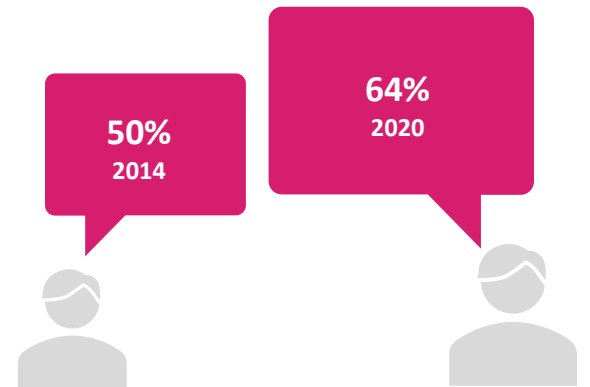


Often check work emails on holiday because they feel it is expected



Find it hard to switch off in evenings and at weekends

## "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:



**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 conversation 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**



**1/2** of GenZ know someone who has been bullied on Social Media.



**1/2** 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)



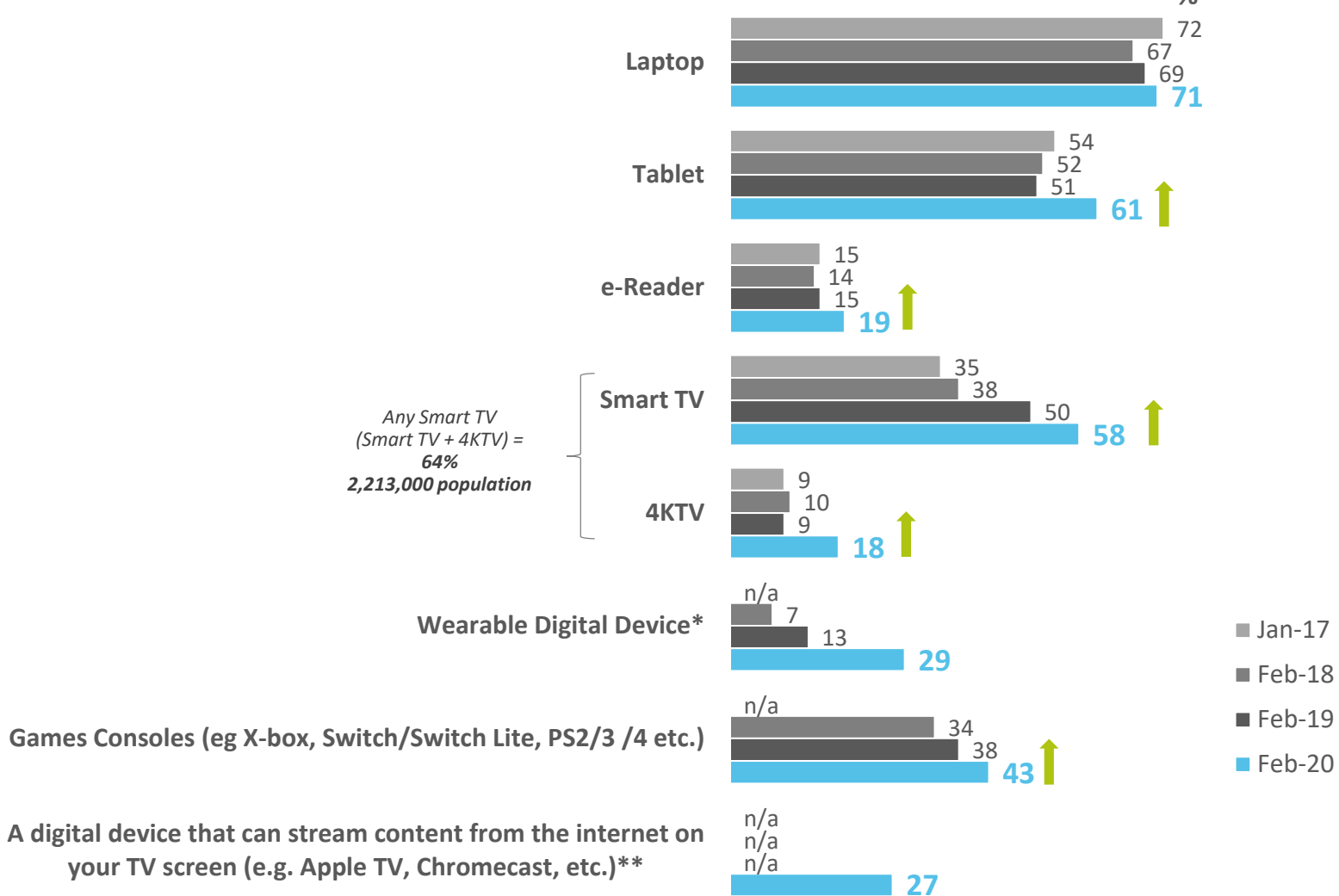


Tech gear

# 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

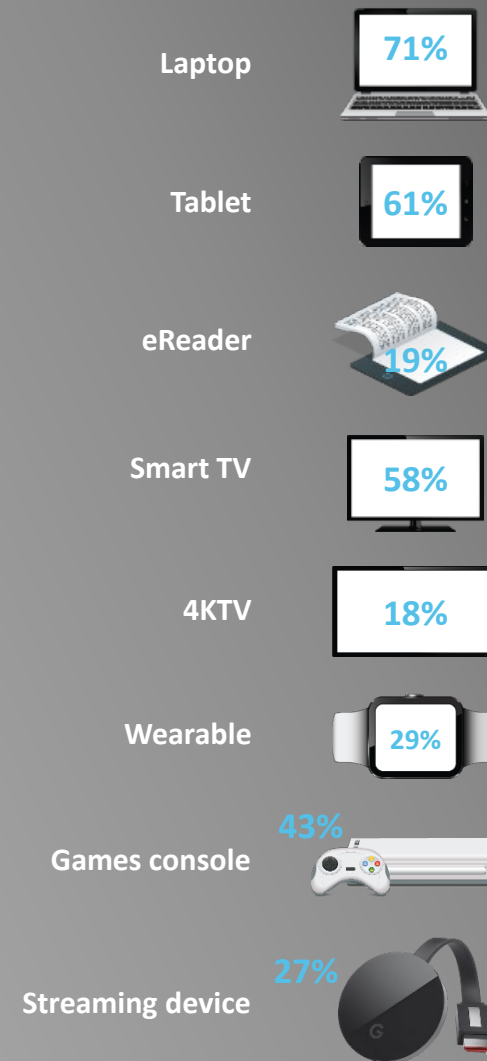
Base: All adults aged 16+ - 934

Devices in Home Trended %



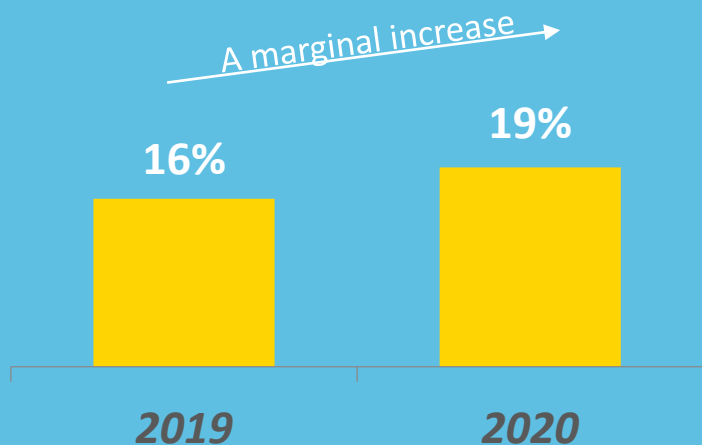
Any Smart TV (Smart TV + 4KTV) = 64%  
2,213,000 population

## 2020 Totals

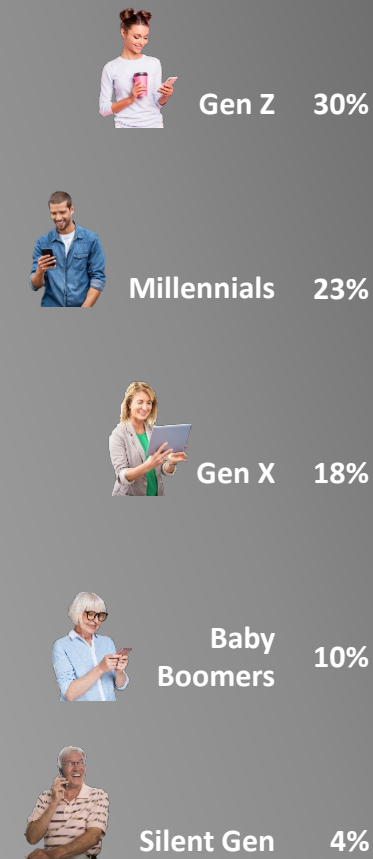


# Other tech in the home

**1 in 5 (19%)**  
has a smart hub/home  
assistant e.g. Alexa, Google  
Home, etc.



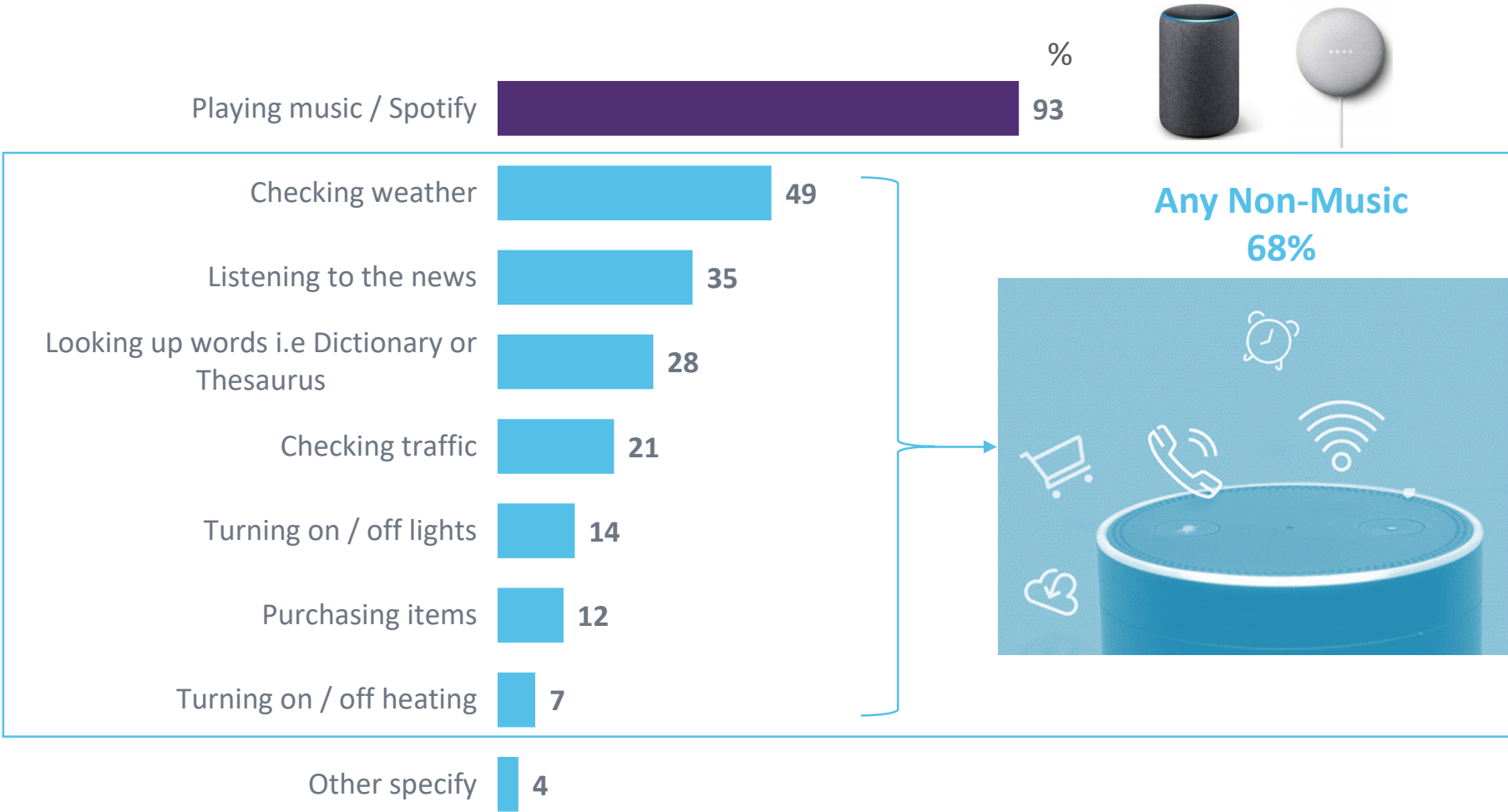
## Generations





# 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



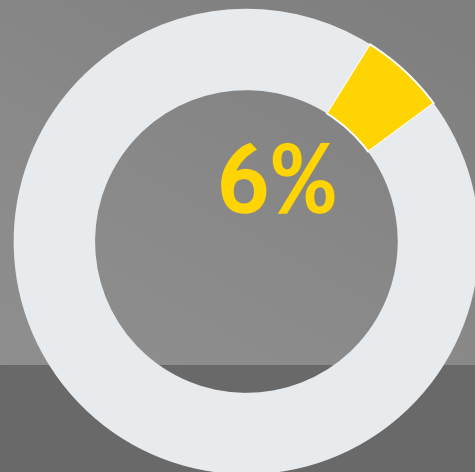
Age category in the household that uses these Smart speakers	
<b>UNWTD</b>	<b>176</b>
	%
Under 12	20
12-17 years	26
<b>18-24 years</b>	<b>36</b>
<b>25-34 years</b>	<b>40</b>
35-44 years	28
45-54 years	24
55-64 years	16
65 years +	5



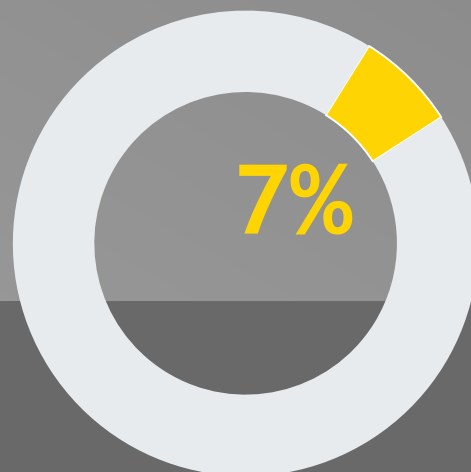
# Other Tech in the home








**VPN/Proxy server**



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

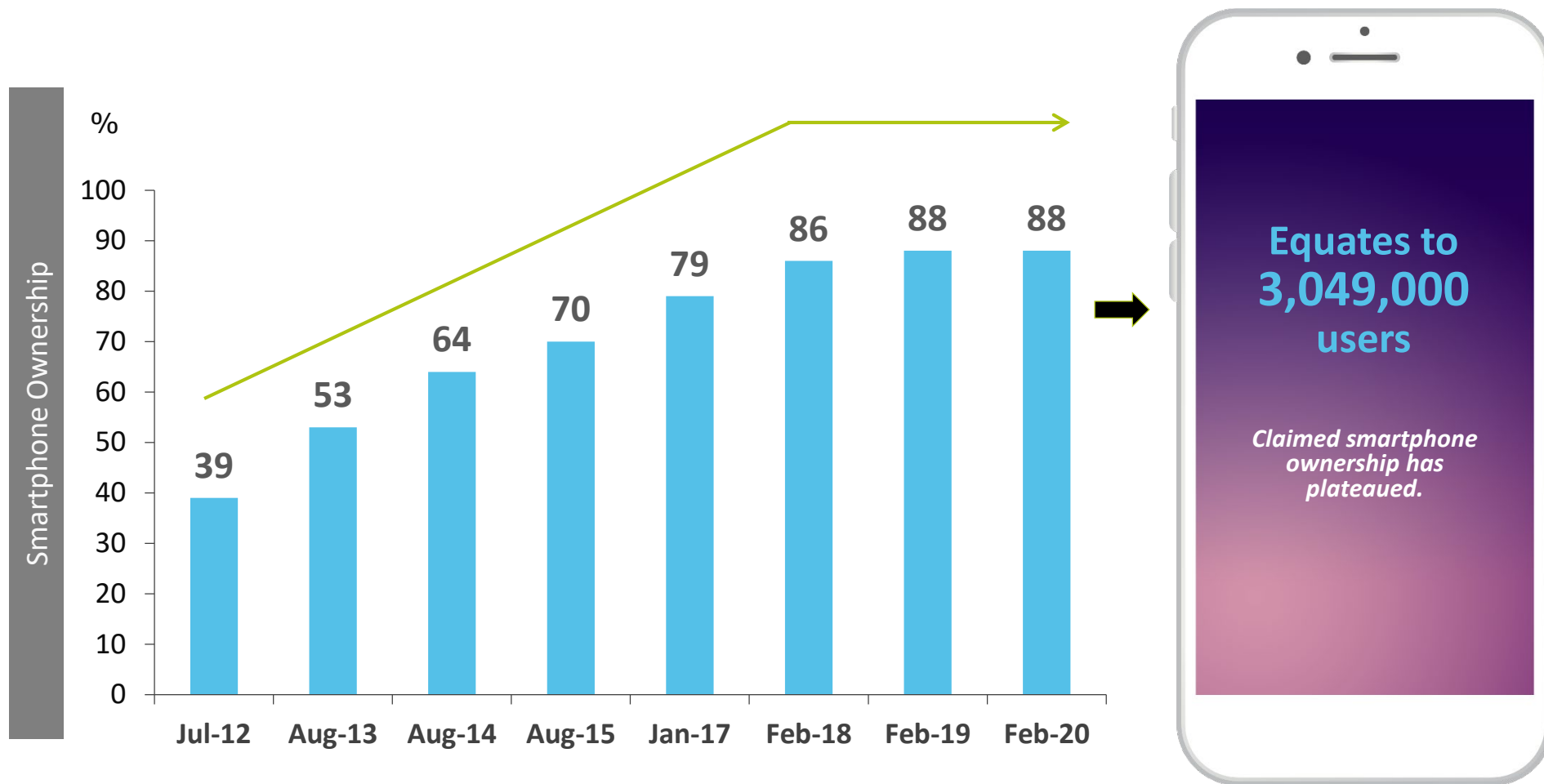


## Generations

	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



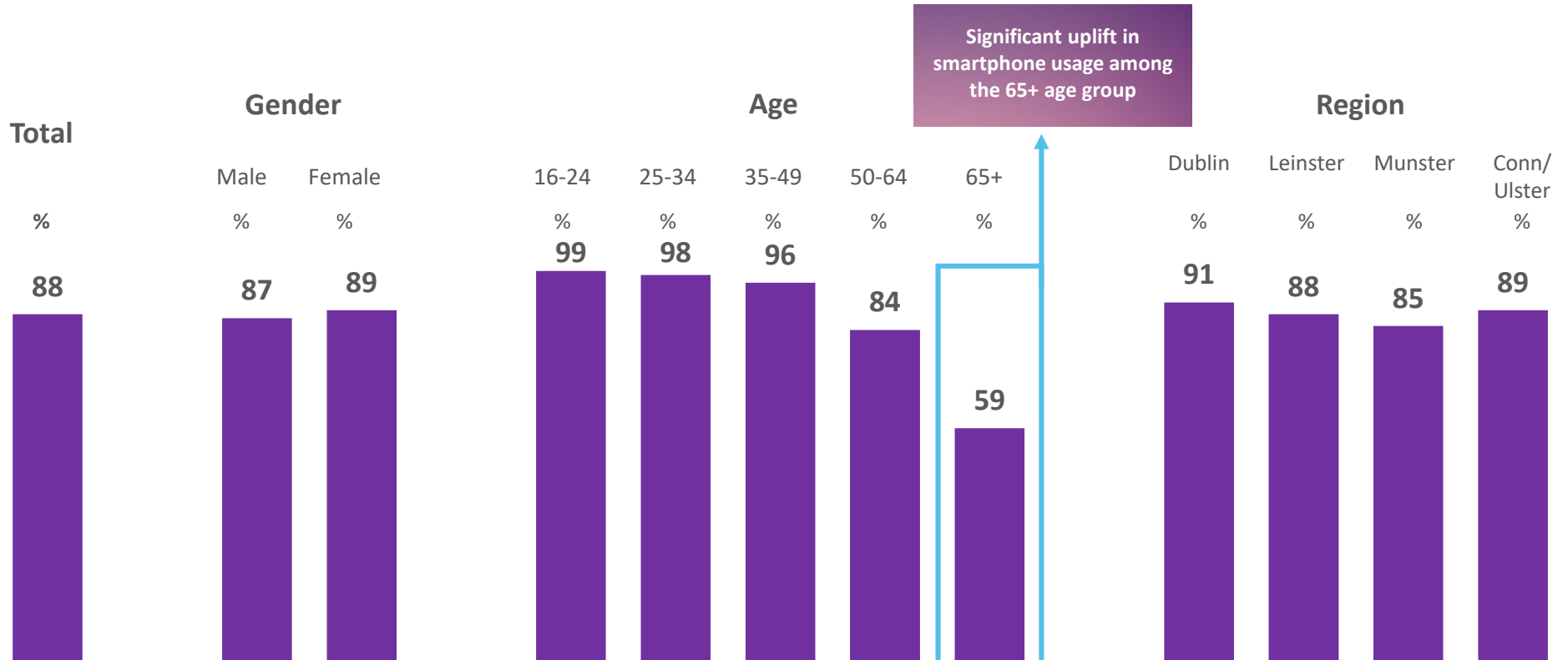
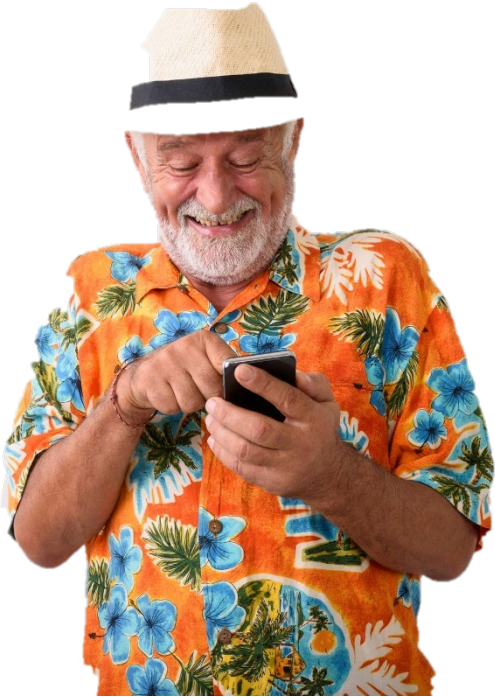
## Generations

	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

# Smartphone ownership among the over 65s is increasing

Base: All with mobile - 934



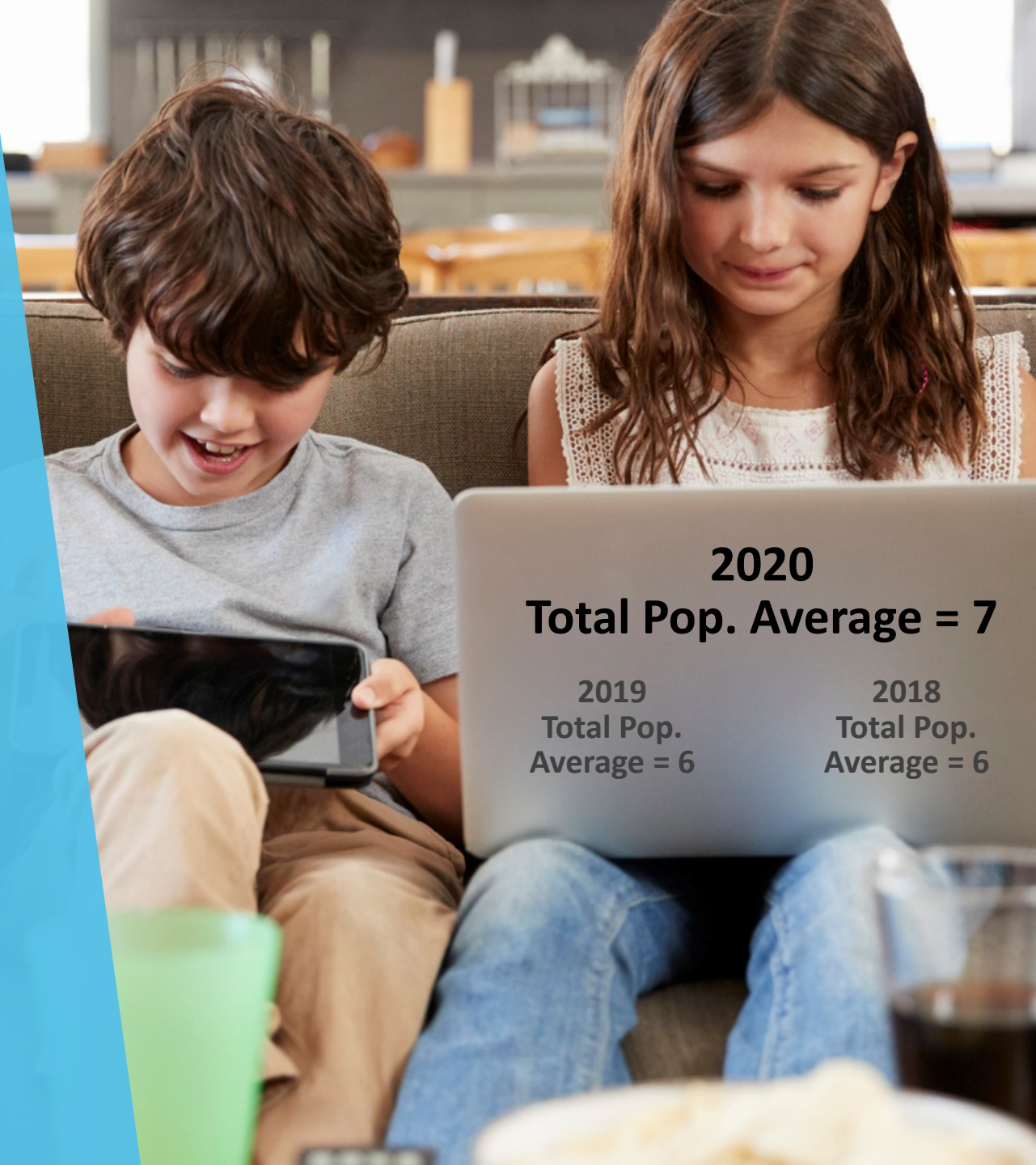
Significant uplift in smartphone usage among the 65+ age group

	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.

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

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



**2020**  
Total Pop. Average = 7

2019  
Total Pop.  
Average = 6

2018  
Total Pop.  
Average = 6

**Generations**  
(Average No.)



Gen Z 10



Millennials 8



Gen X 8



Baby Boomers 5



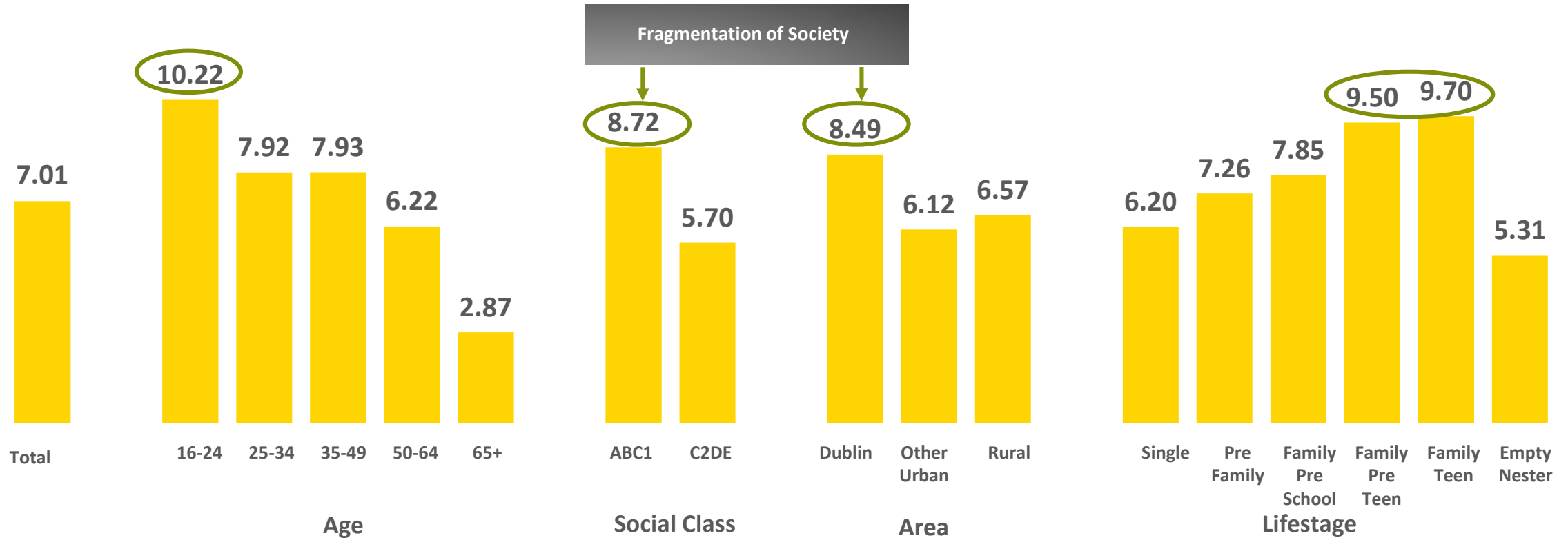
Silent Gen 2



# 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.

## Generations



Gen Z 98%



Millennials 96%



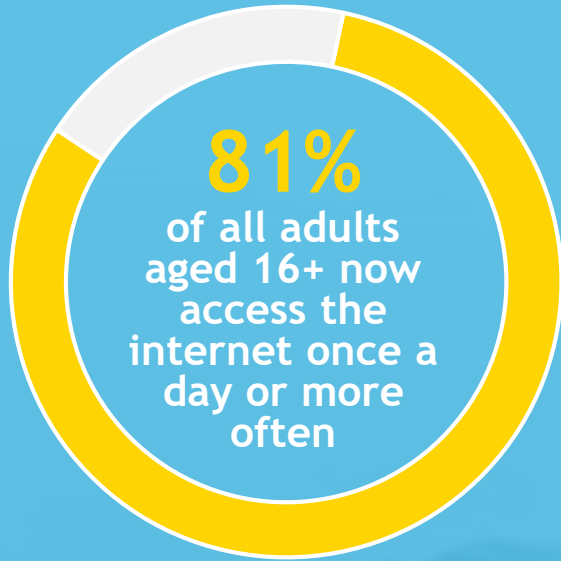
Gen X 86%



Baby Boomers 59%



Silent Gen 26%



**26%**  
Of those 74 yrs+  
(Silent Gen)  
now access the internet  
once a day or more often.

11% of population never access the internet



# 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.



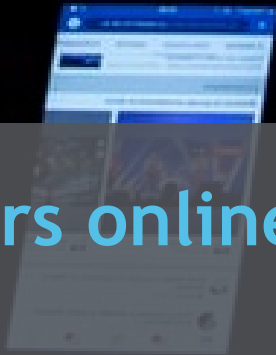
## % Accessing the internet at least once a day



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



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





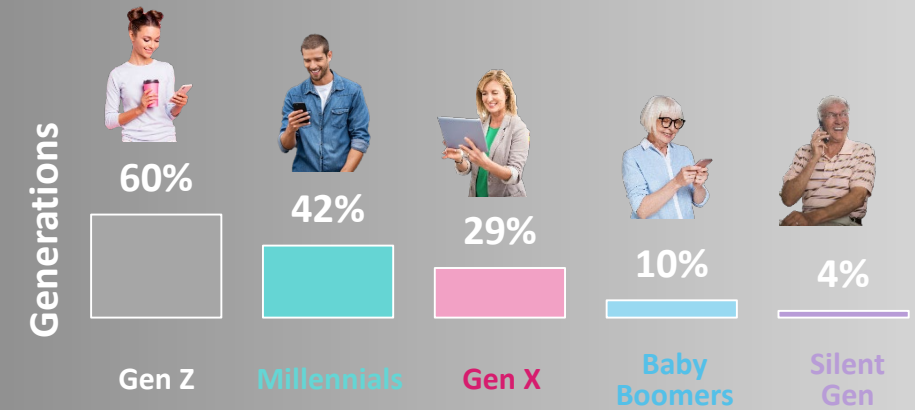
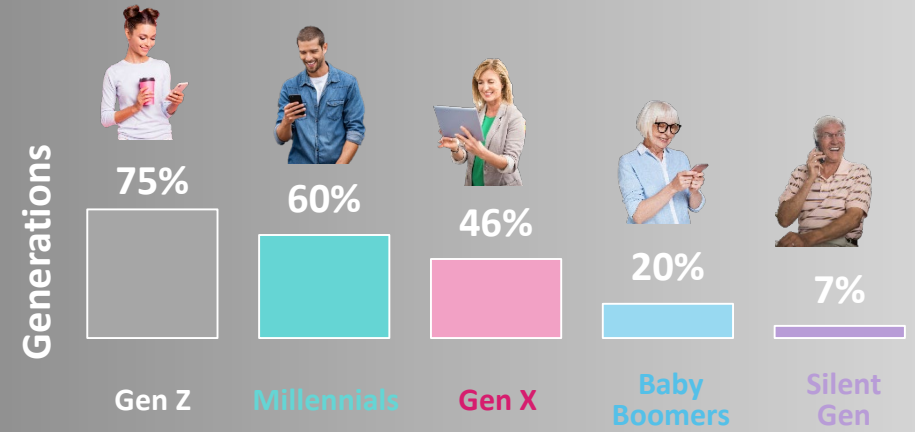
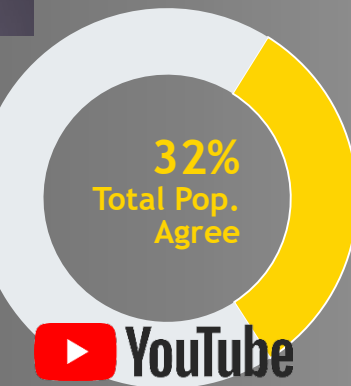
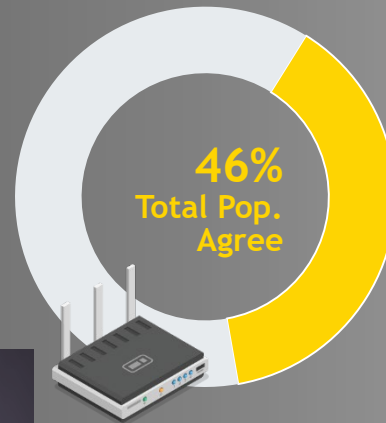
For GenZ and Millennials, BB is more important than TV, with platforms such as YouTube attracting viewership. *N.B. These generations still watch TV*  
It does point to content being king



Broadband is more important to me than TV

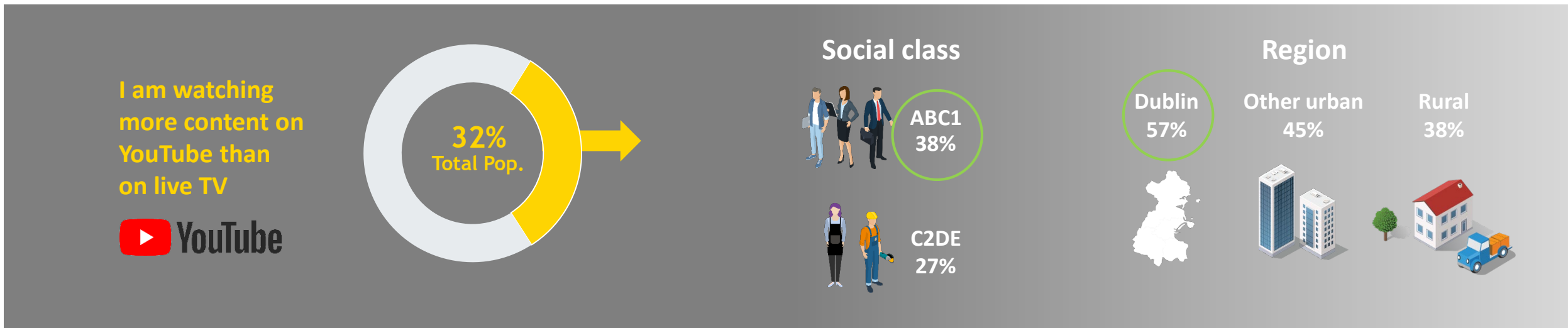
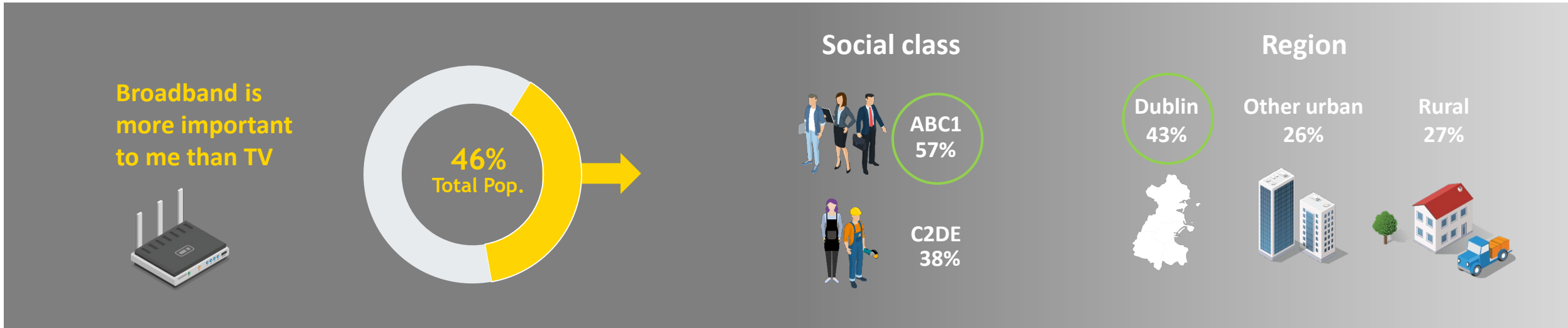
However, remember on average, 2,442,700 Adults 15+ tuned into TV daily in 2019\*

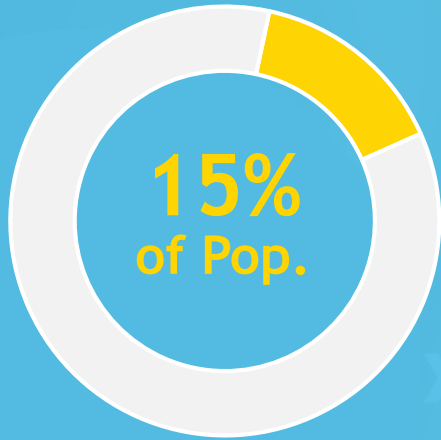
I am watching more content on YouTube than on live TV



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

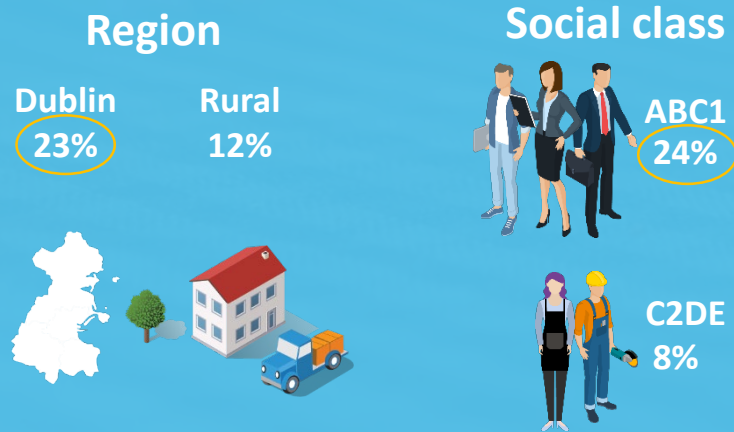
Let us not lose sight of demographics. There is clear divide exists between Dublin: outside and middle class (ABC1): blue collar (C2DE). Dubliners and middle class people have a great affinity with BB (and other tech). This impacts what they use in the home, what they watch and what they interact with.



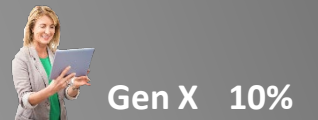
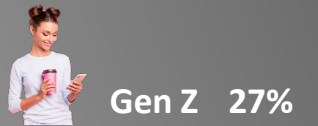


Now over half a million Digital Product/Bank users exist in Ireland

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



### Generations





# 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





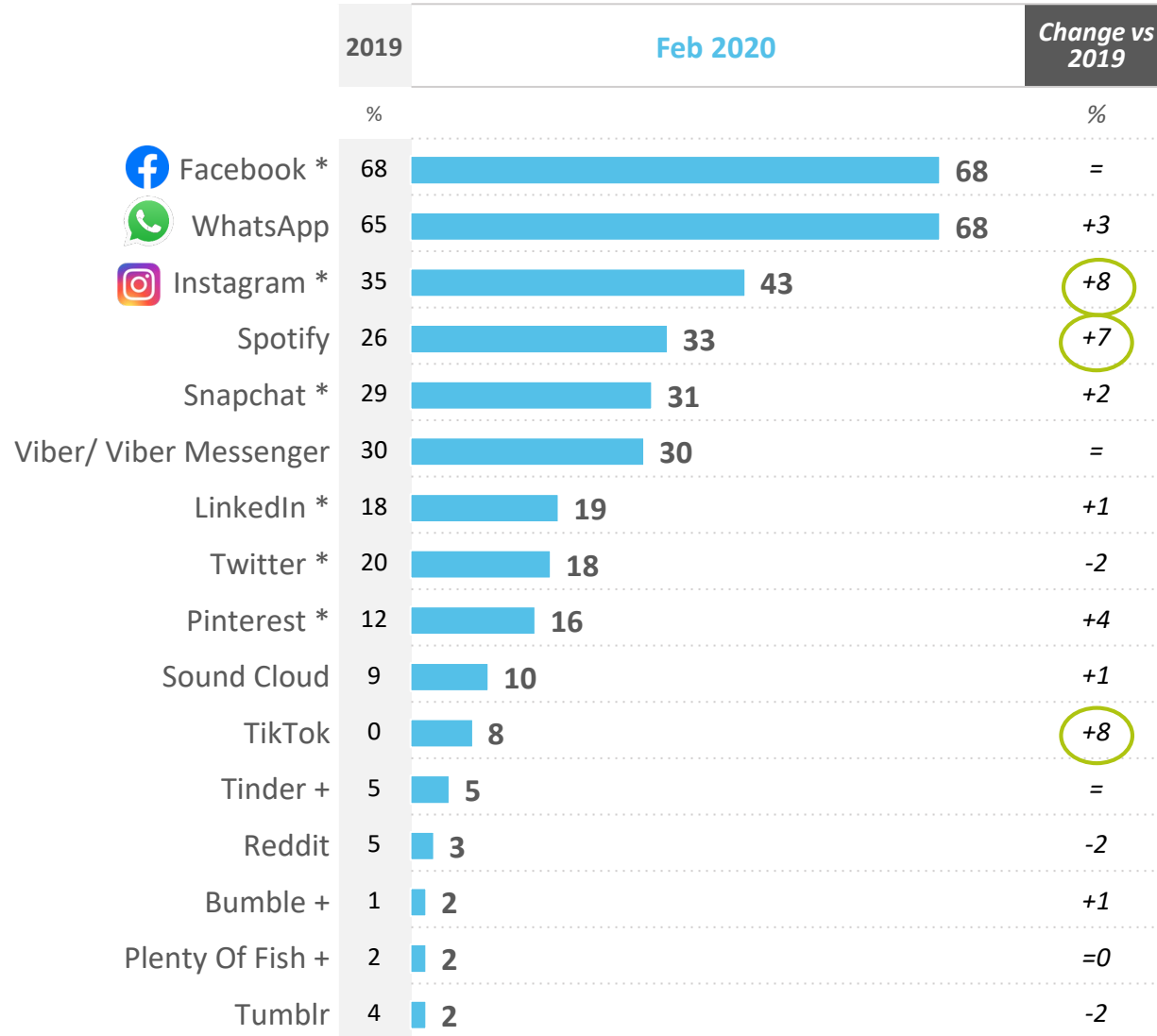


**Social animals**

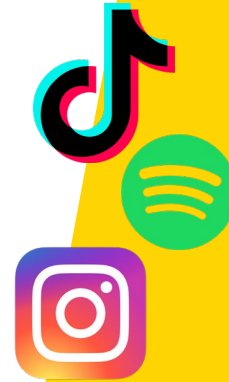


# Facebook and WhatsApp remain the most popular social media and OTT services used in 2020

Base: All Adults 16+ - 1,001



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



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


\*Any Social Media usage nowadays =

**74%**

(73% in 2019)



**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%

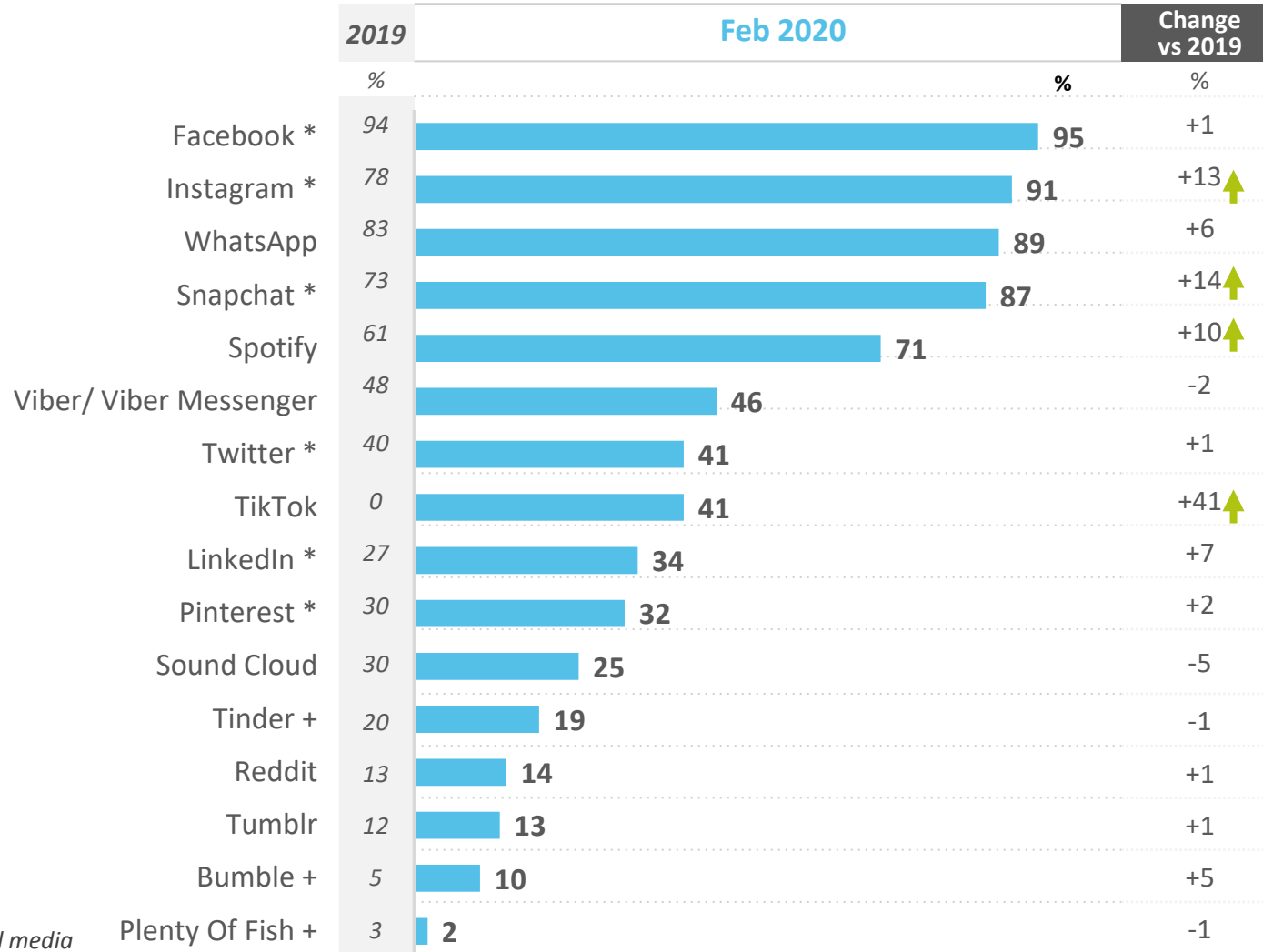


Silent Gen -

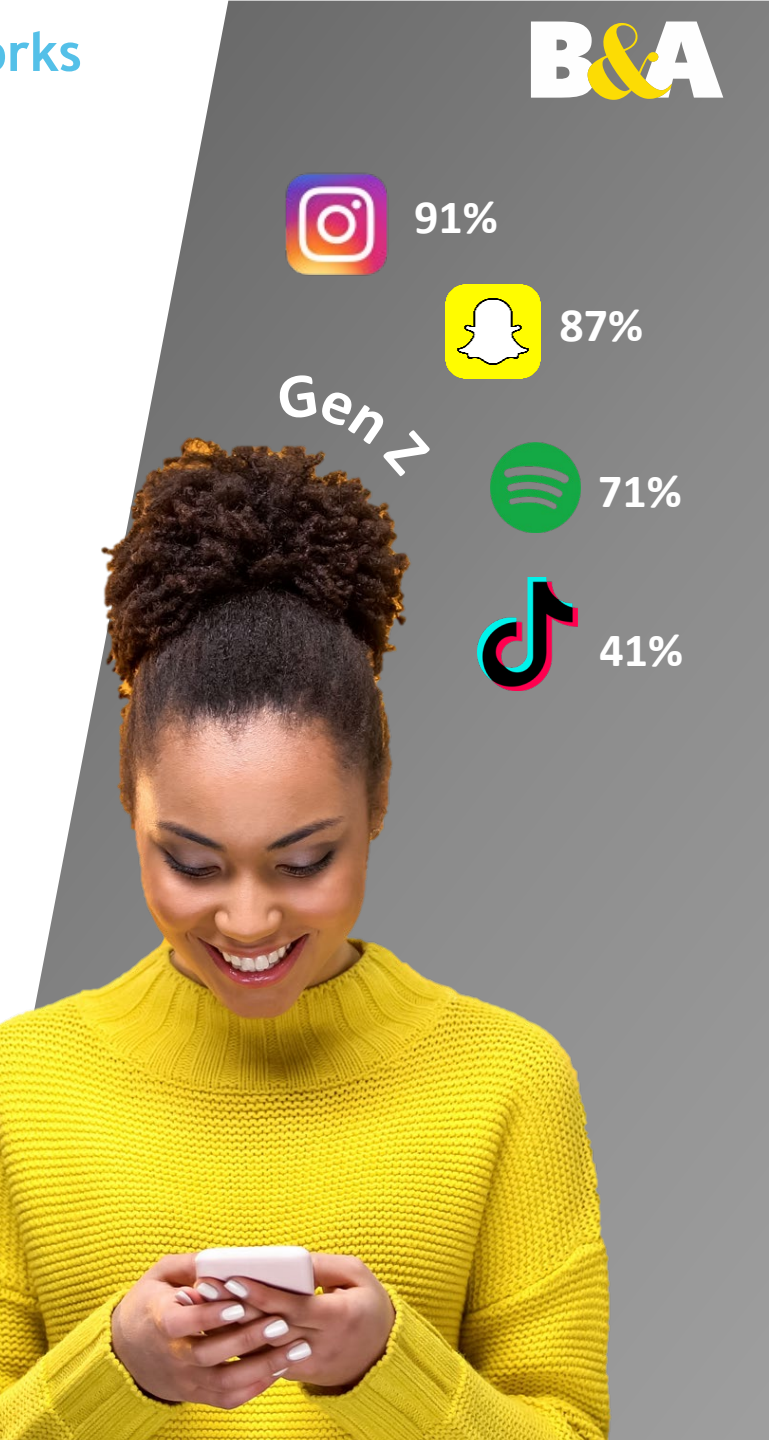


# Facebook, Instagram, WhatsApp and Snapchat most used social networks and OTT services among 16-24 year olds. However most growth for: Instagram, Snapchat, Spotify and TikTok

Base: All 16-24s -61



\* = Social media  
+ = Dating Sites





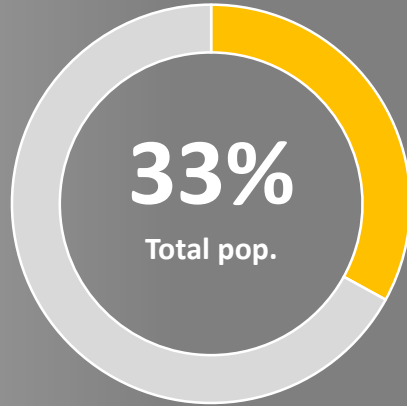


Social impact of tech

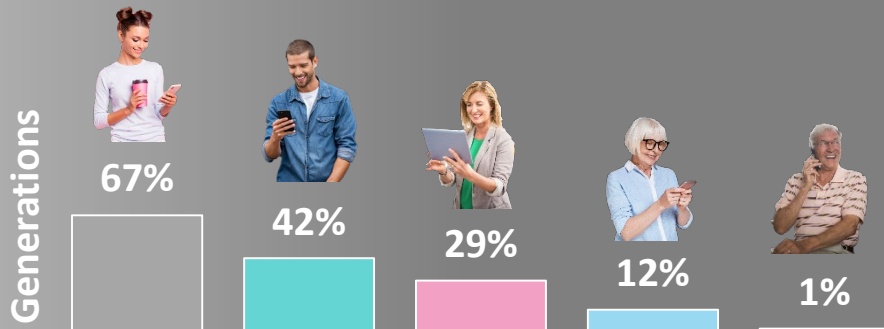


# Oh no ... our mobile is now a social crutch!

Base: All adults 16+ - 1,001



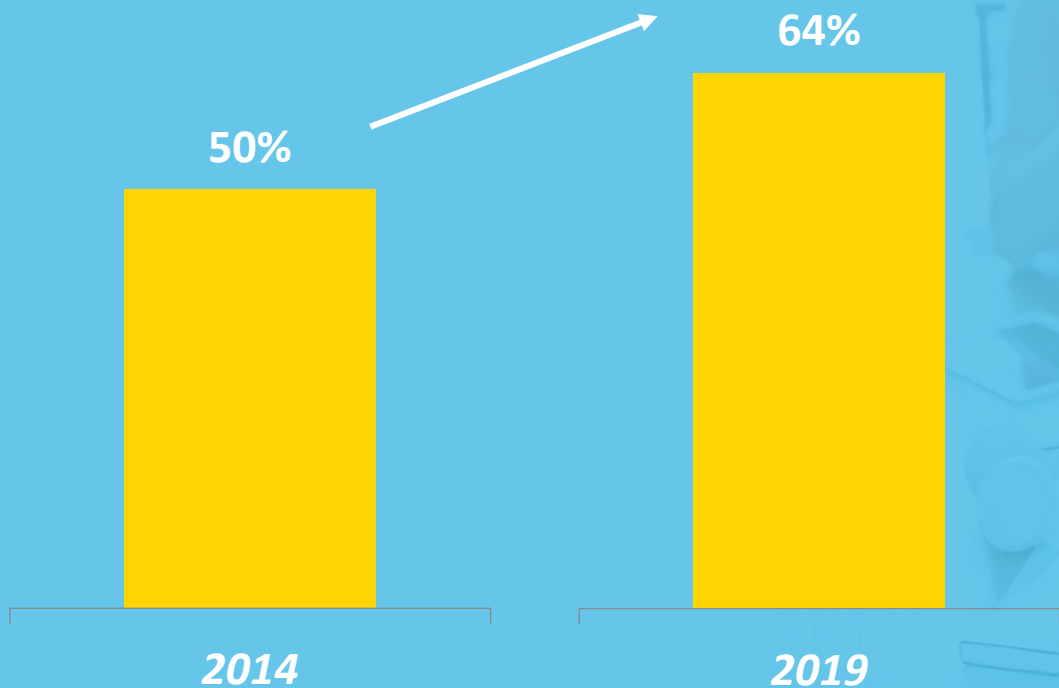
Play or look stuff up on their mobile phone when feeling awkward or in awkward situations with people



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



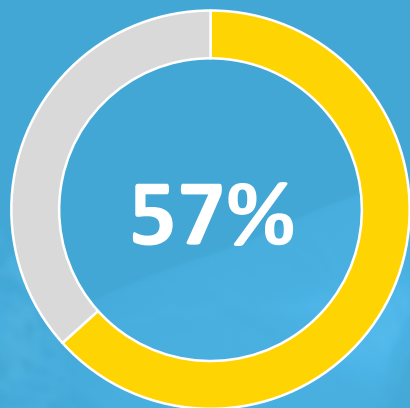
# The art of conversation is increasingly being lost



	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

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

## Generations



Gen Z 69%



Millennials 61%



Gen X 52%



Baby Boomers 38%

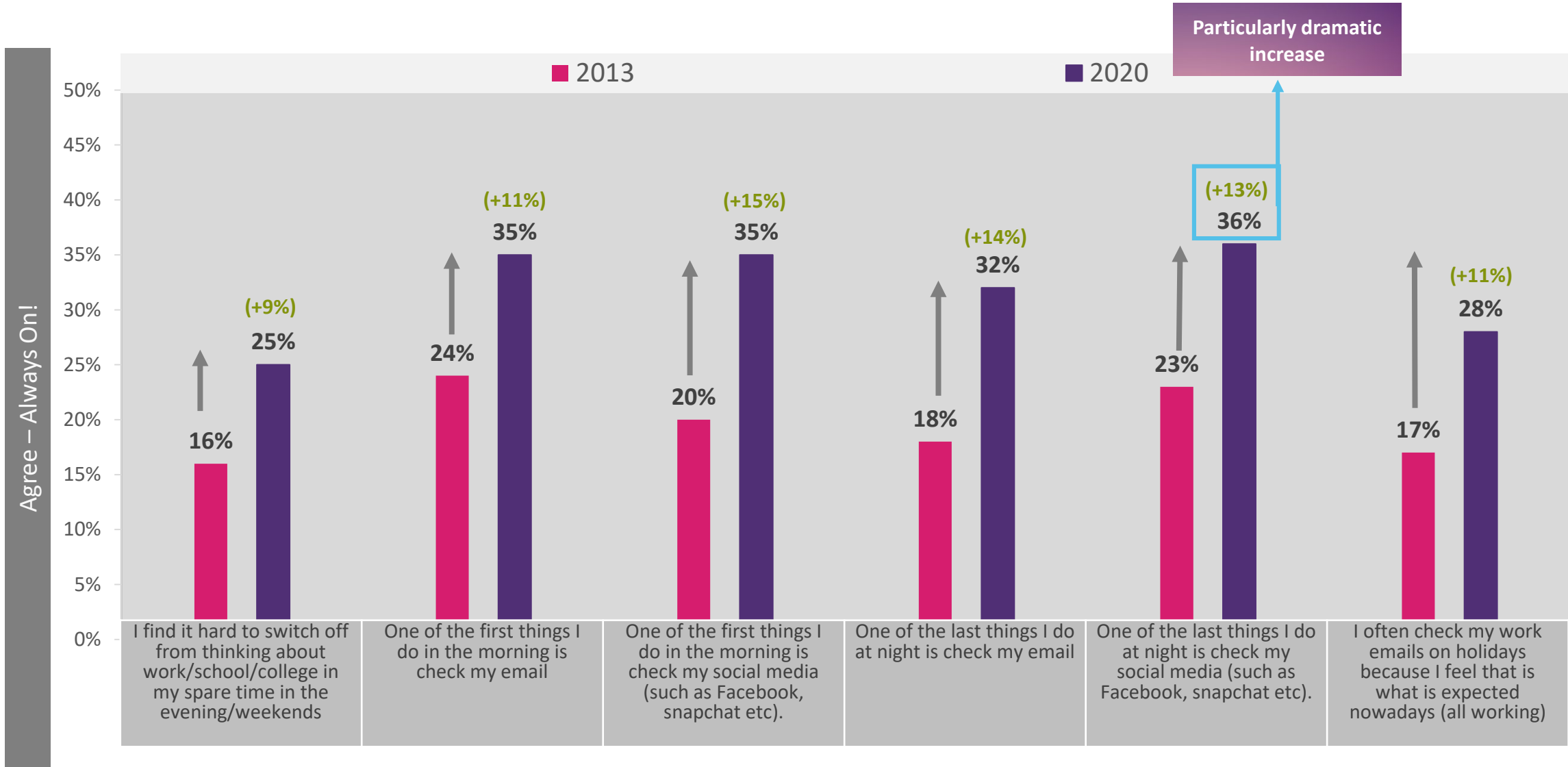


Silent Gen 22%



# Our inability to switch off has multiplied over 7 years!

Base: All adults 16+ 1,001

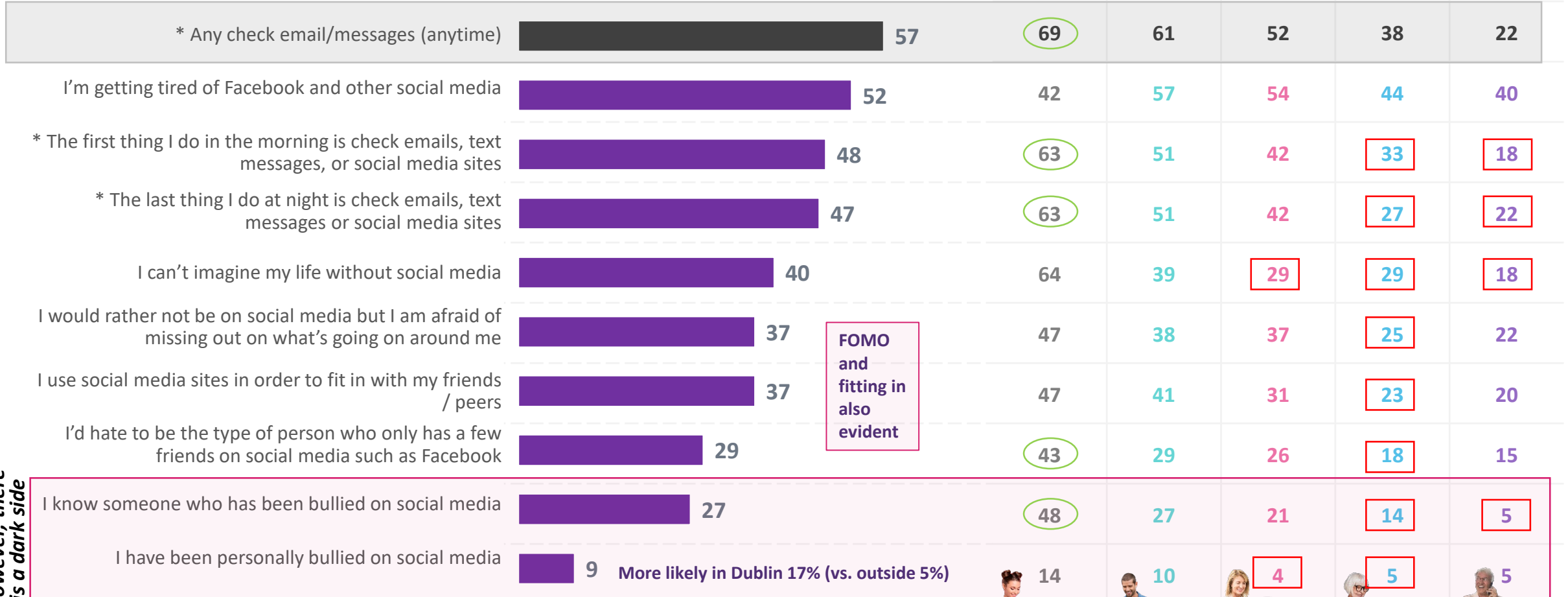


# The addiction and dark side of social media and communications is clear

Base : Use Social Media Sites 708

○ = Significantly higher □ = Significantly lower

Generation				
Gen Z	Millennials	Gen X	Baby Boomers	Silent Gen
111	293	146	137	15
%	%	%	%	%



However, there is a dark side

\* All those who are working

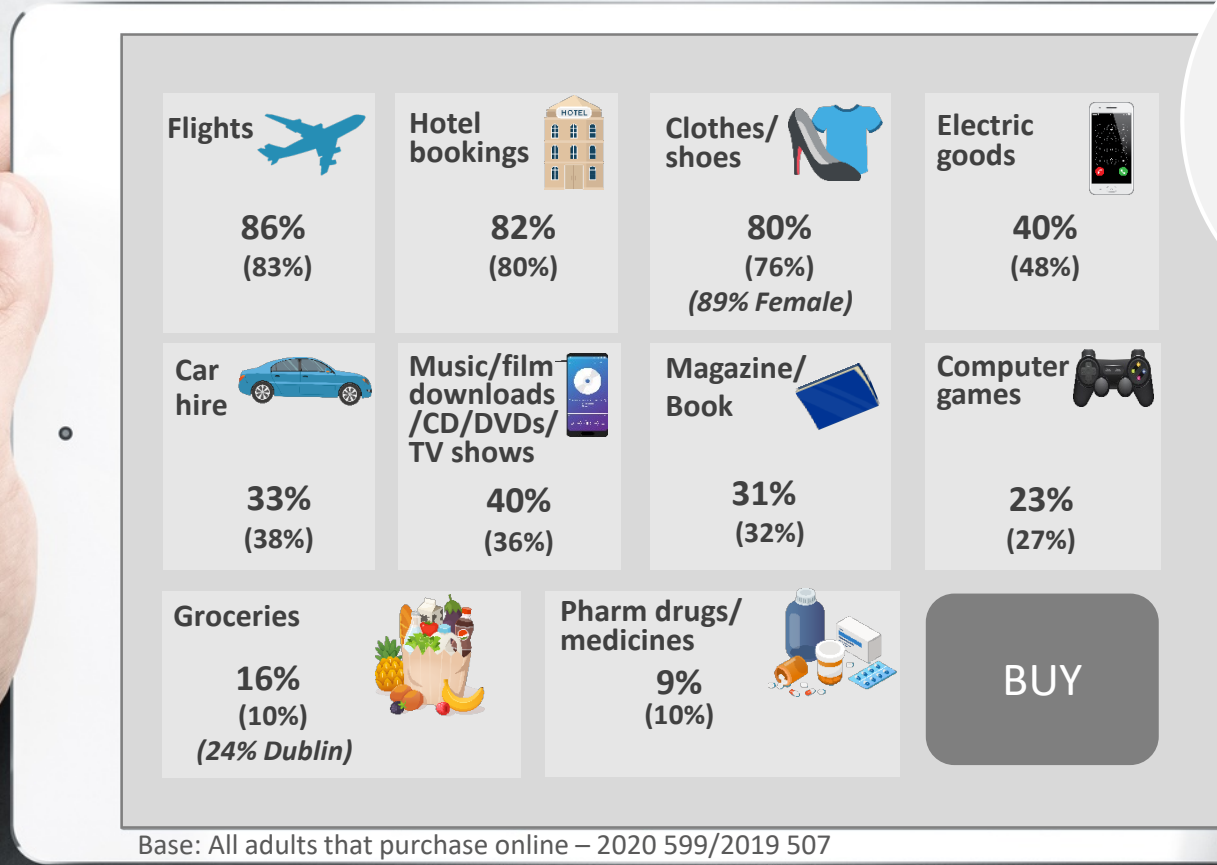




eCommerce



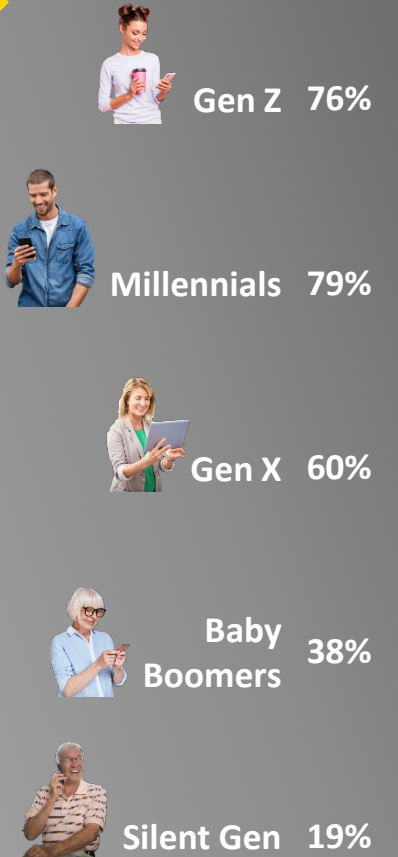
# Growth in online purchasing, but what are we buying online?



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



## Online purchases Generations



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

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

( ) = 2019



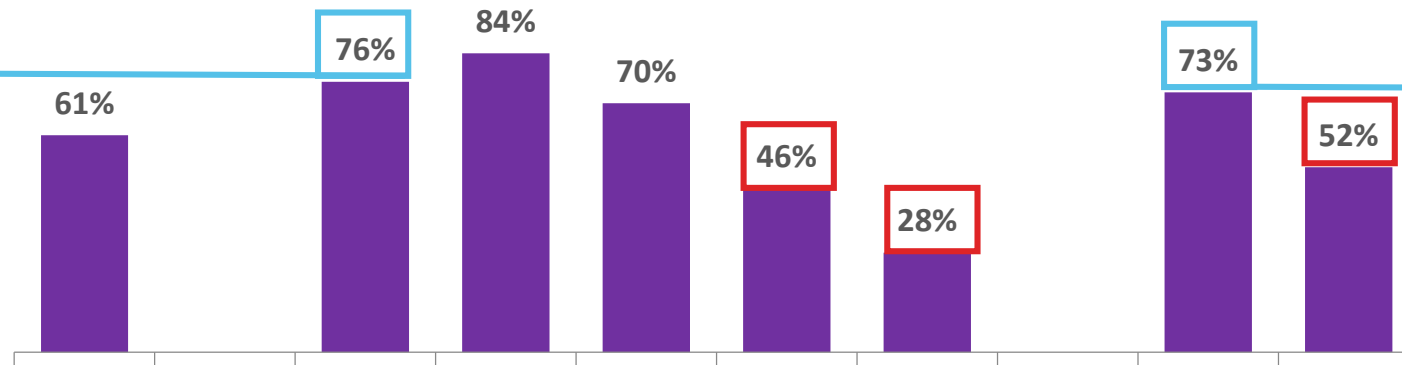
# Who really purchases online?

Base: all Adults 16+ - 1,001

Clear socio-economic divide evident



Total                      Age                      Social Class  
16-24   25-34   35-49   50-64   65+                      ABC1   C2DE



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.

## Generations



Gen Z 6



Millennials 6



Gen X 8



Baby Boomers 5



Silent Gen 3

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?





# 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%

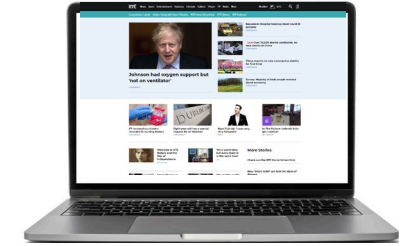
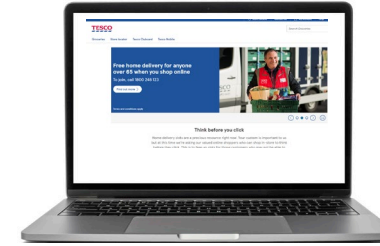


**Parting thoughts**



# 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!

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](http://www.banda.ie)*

# Delve Deeper