RESEARCH
& INSIGHT

TechScape
2022

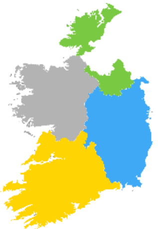
@banda_ie
behaviour&attitudes
behaviour&attitudes

info@banda.ie
Tel: 01 205 7500
www.banda.ie

J.212547

Introduction

TechScape is conducted on our face-to-face CAPI Omnibus amongst a fully representative sample of 1,003 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 during May 2022.

6 themes at Davos 2022: Theme #6: 'Our future is digital'

Technology was theme six at Davos 2022.

Technology, carefully executed, could act as a multiplier to address multiple challenges simultaneously – from reducing poverty to stopping climate change, as the First Movers Coalition is working to do by commercializing emerging clean technologies. But to get there, digital inclusion, security and appropriate regulation are essential. Leaders at Davos 2022 discussed what this future might look like – and launched several exciting initiatives to advance both technology, and trust in it.
“Our future is digital. If you’re not part of it, you’re out of it,” Administrator of the United Nations Development Programme Achim Steiner, told the Forum’s Meet the Leader Podcast.

“Given the pervasiveness of digital technology in our society, in our lives, in our work, I think it's inevitable to have stronger regulatory regimes around all facets of technology. If anything, I think the responsibility of stakeholders like ourselves or businesses like us is to both anticipate and adapt to regulation versus ignore it or expect not to have regulation,” said Microsoft CEO Satya Nadella in a wide-ranging conversation with Klaus Schwab at Davos.

At Davos 2022, leaders from the space technology sector called for increased cybersecurity around space-based services as well as regulatory frameworks and collaboration of all stakeholders. Back on Earth, 18 leading oil and gas stakeholders launched the Cyber Resilience Pledge, in which they commit to collaborate and take collective action on cyber resilience.

Stakeholders launched Defining and Building the Metaverse, an initiative to provide guidance on how to create an ethical and inclusive metaverse. The initial focus will be on governance, and economic and societal value creation.

Source: https://www.weforum.org/agenda/2022/06/davos-2022-key-themes-global-cooperation-health-equity-digital-inclusion-economic-outlook/

Introduction

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 **generation** have been detailed below:

GenZ

Born 1997 – 2005
Age 16 – 23

11%

417,000

Millennials

Born 1978-1996
Age 24 - 42

34%

1,353,000

Gen X

Born 1966-1977
Age 43-54

21%

829,000

Baby Boomers

Born 1947-1965
Age 55-73

26%

1,010,000

Silent Gen

Born 1946+
Age ≤74

9%

336,000

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

Important we understand the developed lifestage and age (and overlap) of the ‘Generation’ jargon

	Total pop	 Gen Z	 Millennials	 Gen X	 Baby Boomers	 Silent Gen
	3,945	*417*	*1353*	*829*	*1010*	*336*
Base:	*1003*	*93*	*328*	*204*	*294*	*84*
Gender						
Male	49	52	48	51	50	40
Female	51	48	52	49	50	60
Lifestage						
Single	41	95	34	22	42	52
Pre Family	5	1	12	2	-	-
Family Pre School	12	4	30	6	0	-
Family Pre Teen	14	-	22	30	1	-
Family Teen	6	-	2	20	5	-
Empty Nester	22	-	-	21	52	48

** **Definition:** single/widowed/divorced and no children under 18 yrs*

*** **Definition:** married (cohabiting) and 45+ and no children under 18 yrs*

Key Themes 2022

Key themes

1.

Smart TVs & Smart Hubs grow

2.

Hybrid remote working is here to stay, with Zoom being the main winner

3.

The average number of Smart devices is now **8** in the home

4.

Growth in multiple video streaming platforms

5.

A new era of banking with growth in digital operators.

6.

Broadband is now a utility like electricity especially for those under 50.

7.

Divided society as Dubliners and the middle class dominate tech

8.

Online shopping growth maintained

9.

Ever-changing ‘Social’ world
TikTok bigger than Twitter, Instagram growing.

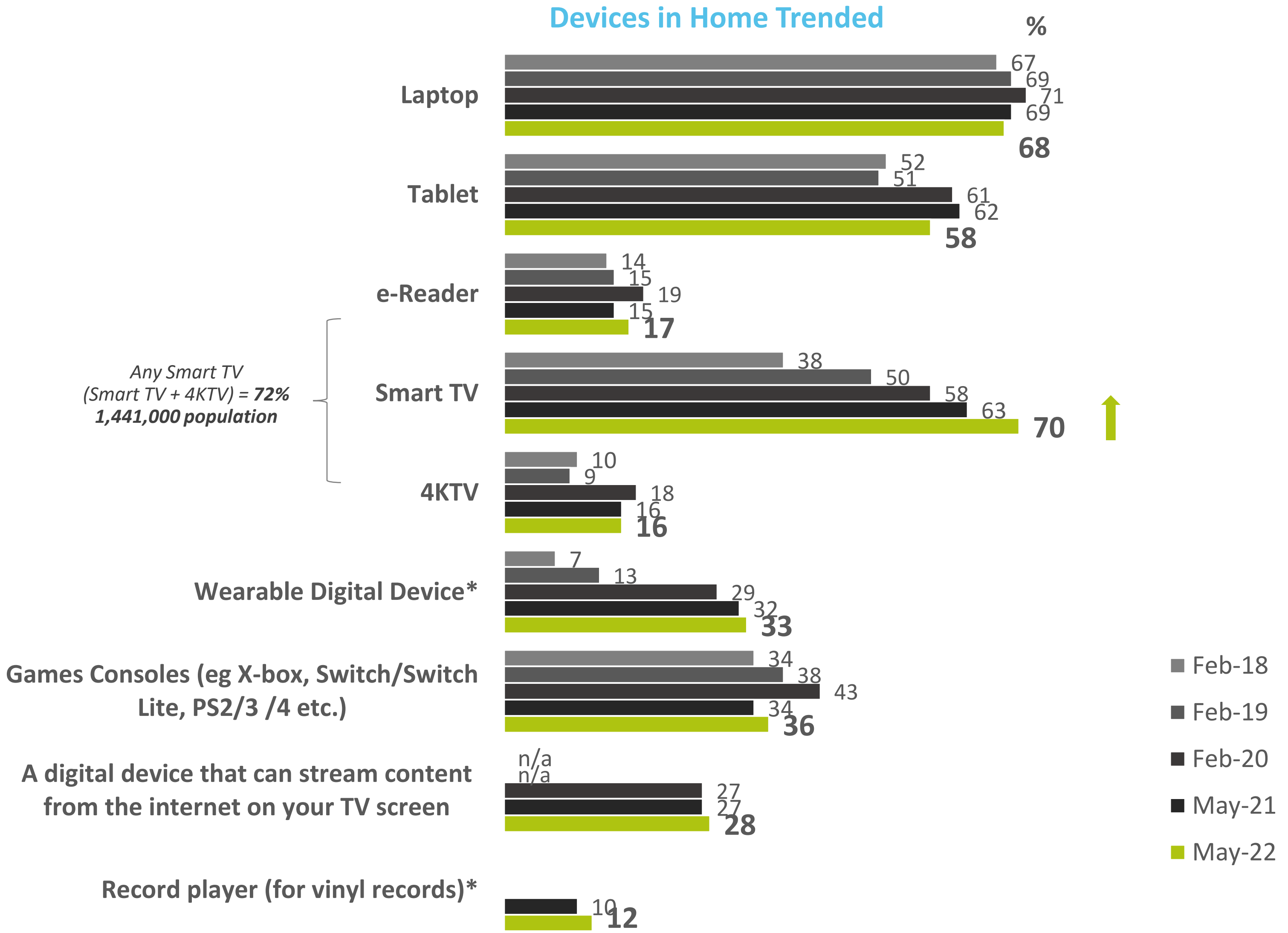
10.

Don’t leave the older generation behind
- A third of 65+ don’t access the internet.

Tech gear

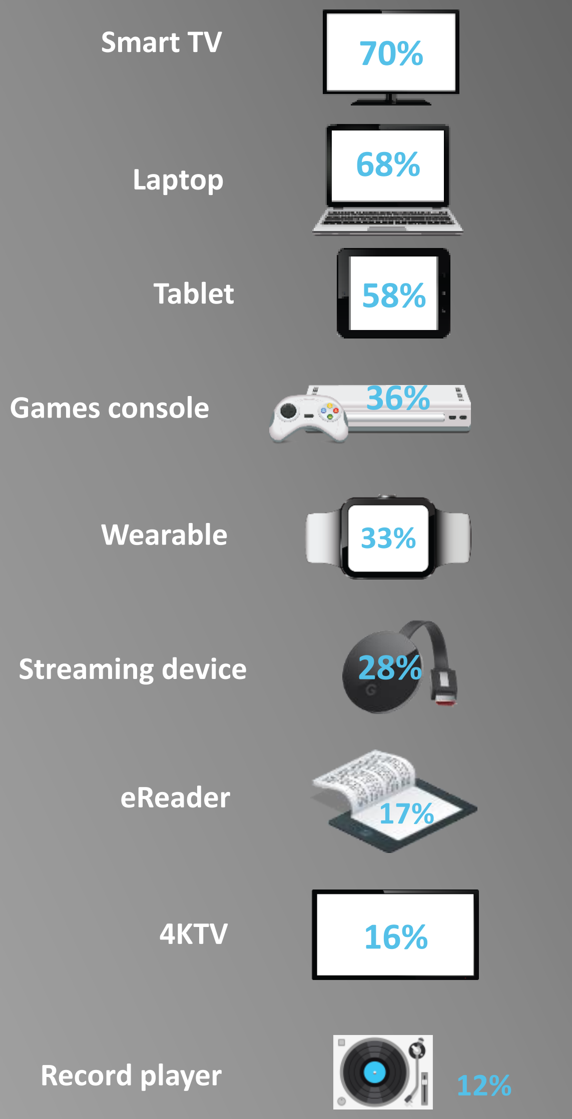
A pretty stable picture over the past years, with ownership of Smart TVs the main growth area.

Base: All adults aged 16+ - 1,003



Any Smart TV (Smart TV + 4KTV) = ***72%***
1,441,000 population

2022 Totals



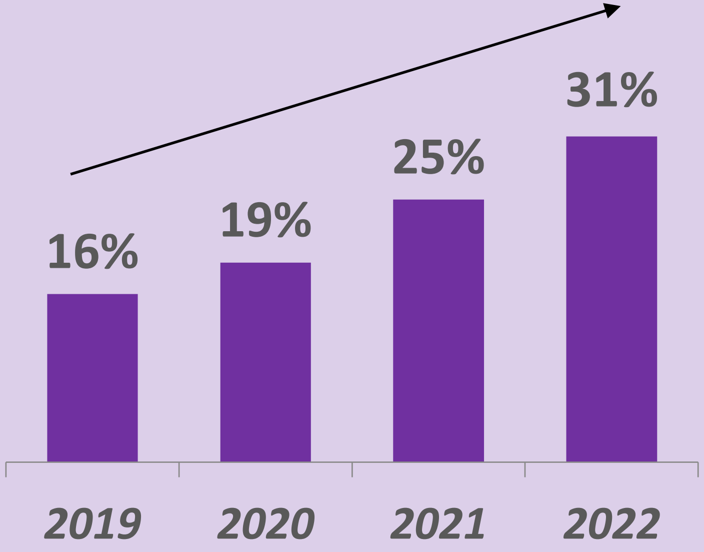
Which of the following devices are in your household?

**Added 2021*

Ownership of smart hubs is also on the increase.

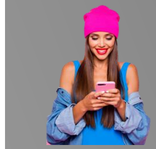
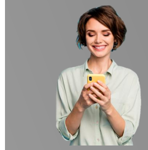
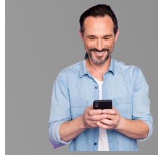
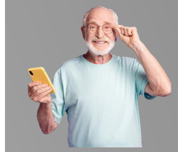
31%

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



Ownership of smart hubs peaks amongst Generation Z and Millennials

Generations

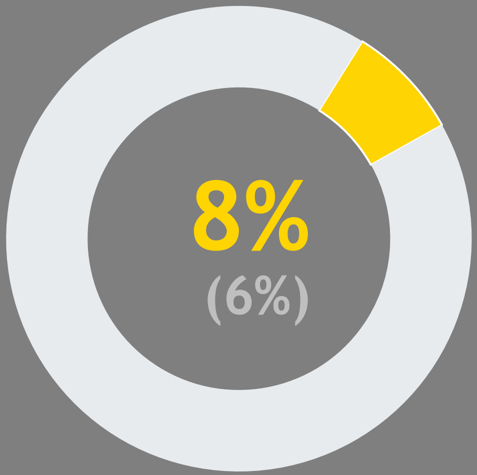
			± vs 2021
	Gen Z	○ 49%	+10%
	Millennials	○ 40%	+3%
	Gen X	37%	+14%
	Baby Boomers	□ 17%	+5%
	Silent Gen	□ 3%	=

○ = Significantly higher

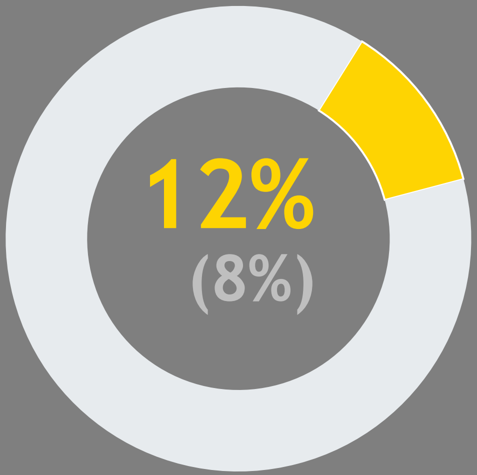
□ = Significantly lower

Which of the following devices are in your household?

Other tech in the home such as smart heating increase



VPN/Proxy server



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

Generations

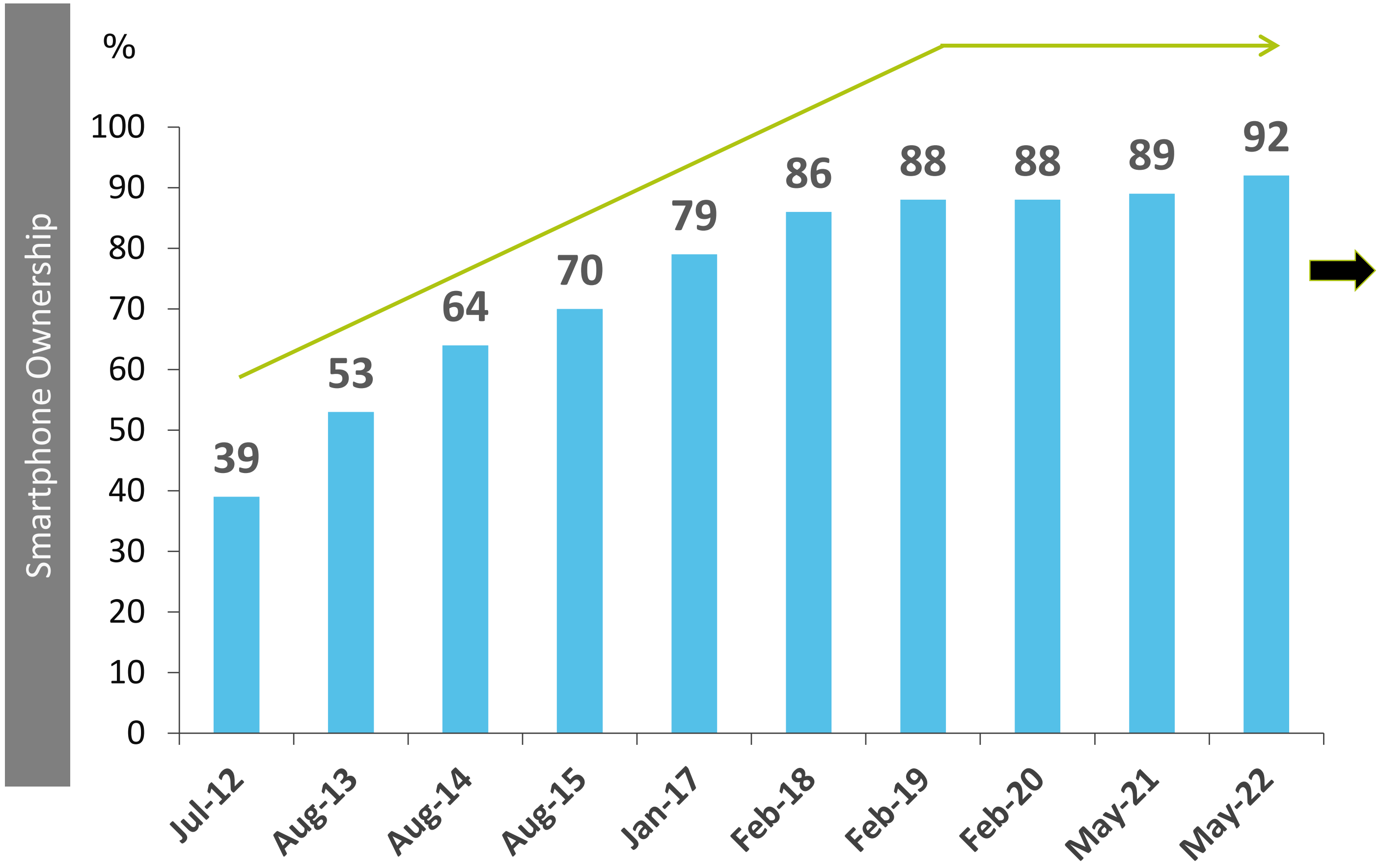
		 VPN/ Proxy Server	 Smart home heats devices (e.g. Hive/Nest)
	Gen Z	17%	18%
	Millennials	9%	16%
	Gen X	11%	13%
	Baby Boomers	4%	7%
	Silent Gen	0%	2%

○ = Significantly higher □ = Significantly lower

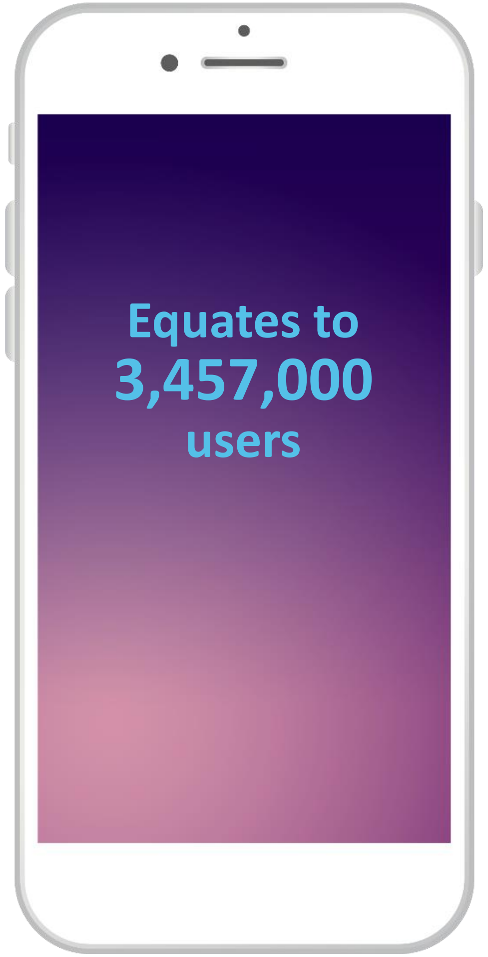
()=2020 data

More than 9 in 10 mobile phone users have a smart phone:
58% among the silent generation (those aged 74 years+)

Base: All with mobile – 956

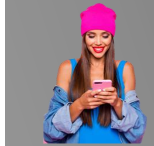


Pre-January 2017 comparable data from eir Connected Living Survey 2015

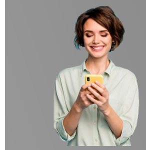


Equates to 3,457,000 users

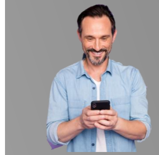
Generations



Gen Z **100%**



Millennials **99%**



Gen X **98%**

Baby Boomers **83%**

Silent Gen **58%**

○ = Significantly higher

□ = Significantly lower

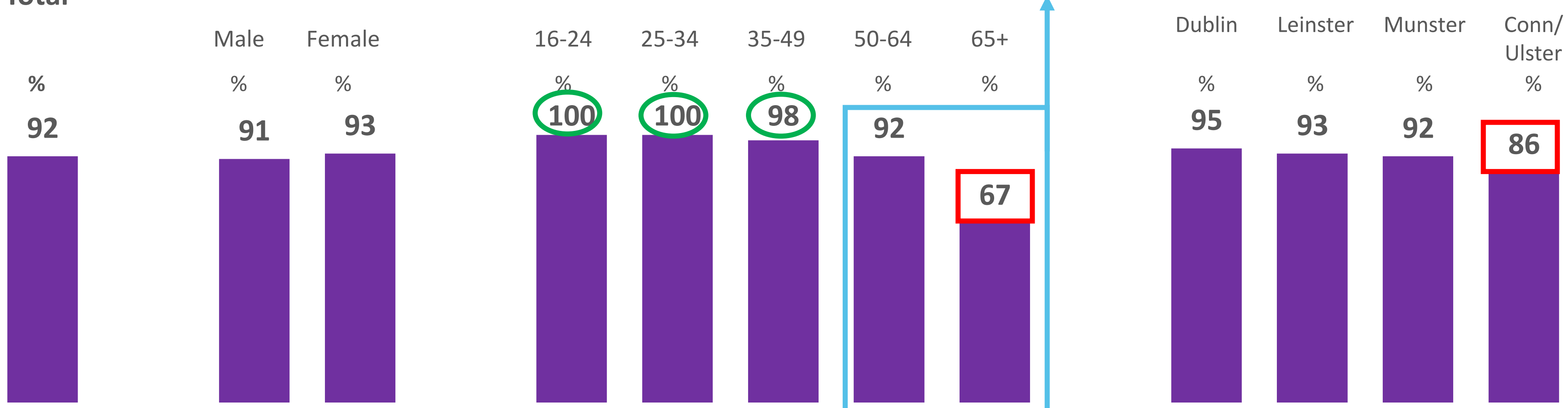
Which of the following devices do you currently use?

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

Base: All with mobile - 956

○ = Significantly higher ☐ = Significantly lower

Smartphone usage among the 50+ age group is continuing to grow.



	Total	Male	Female	16-24	25-34	35-49	50-64	65+	Dublin	Leinster	Munster	Conn/ Ulster
% 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
% 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 50’s age group is increasing steadily.

Which of the following do you use nowadays?

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

Number of devices in the house continues to edge up.

Families with teenagers have an average of 10-11 SMART* devices at home

2019	2020	2021	2022
Total Pop. Average = 6	Total Pop. Average = 7	Total Pop. Average = 7	Total Pop. Average = 8

Generations (Average No.)

	Gen Z	12
	Millennials	9
	Gen X	9
	Baby Boomers	5
	Silent Gen	2

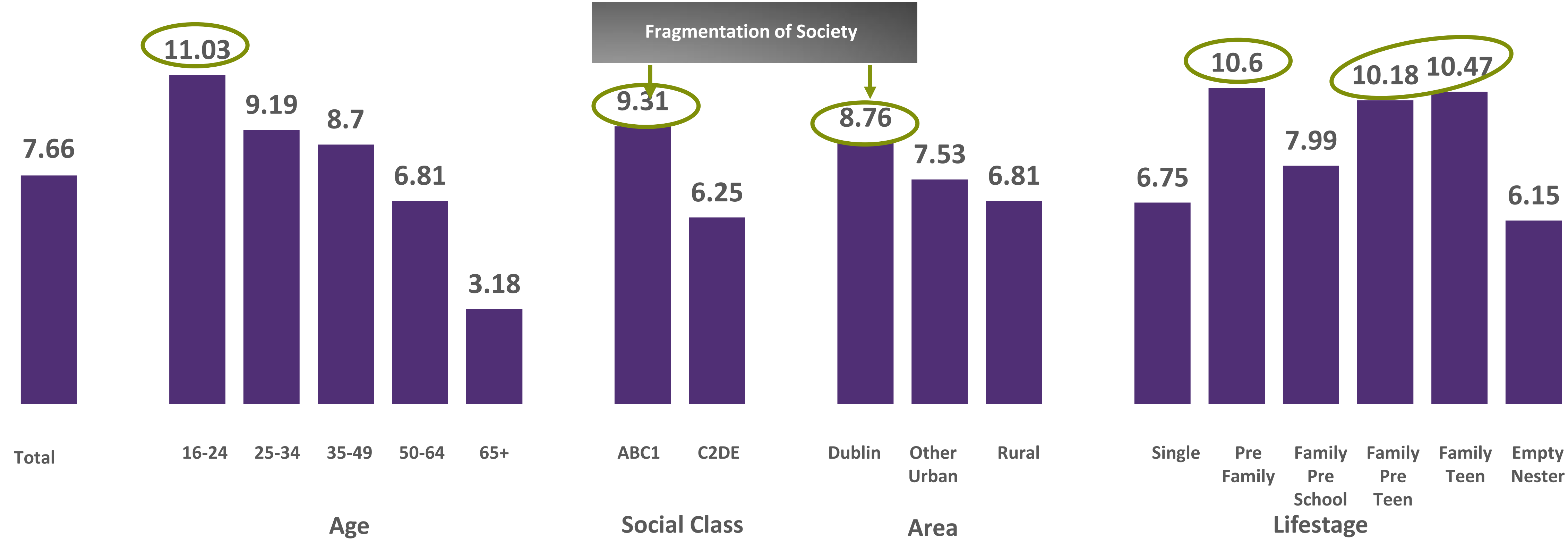
○ = Significantly higher

□ = Significantly lower

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

○ = Significantly higher ☐ = Significantly lower

May 2022



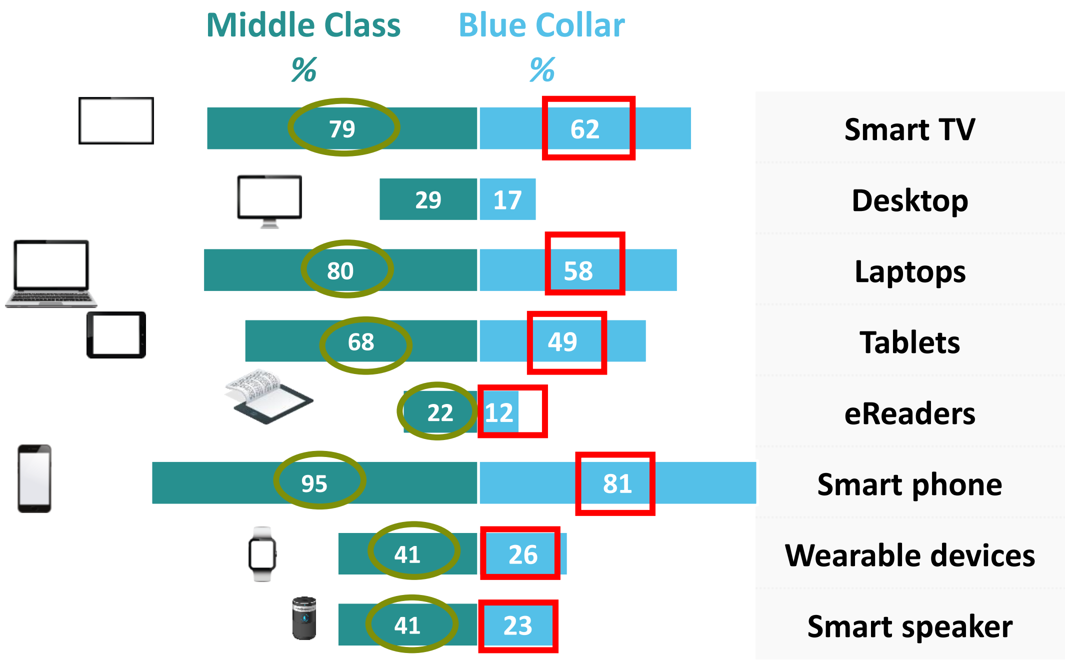
Those from a middle class background, Dubliners and Pre Family and Family Pre Teen/Teen lifestages have access to the highest number of potential on-the-go devices.

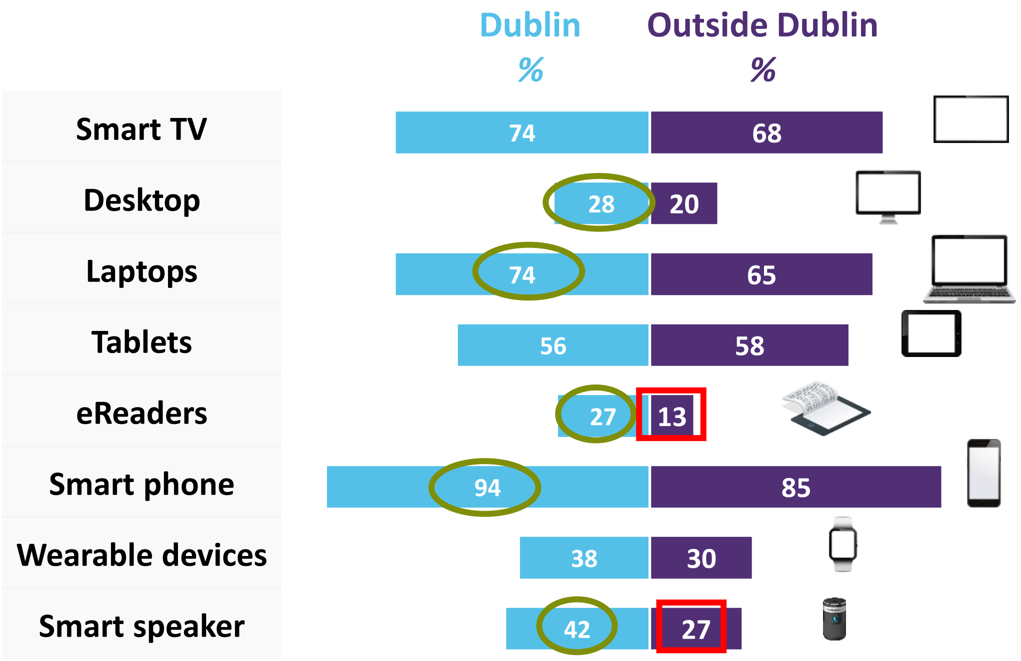
? *And how many are in the household?*

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

A Tech divide still exists:

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





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

- ABC1 9 devices
- C2DE 6 devices

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

For example the gap: Netflix (-19%pts), Catchup TV (-20%pts), stream music (-19%pts), online banking (-25%pts), podcasts (-19%pts)

Less likely to use social media sites (-15%pts) & buy online: 52% C2DE vs 73% ABC1

Dublin access to devices has improved,

- Dublin 9 devices
- Outside 7 devices

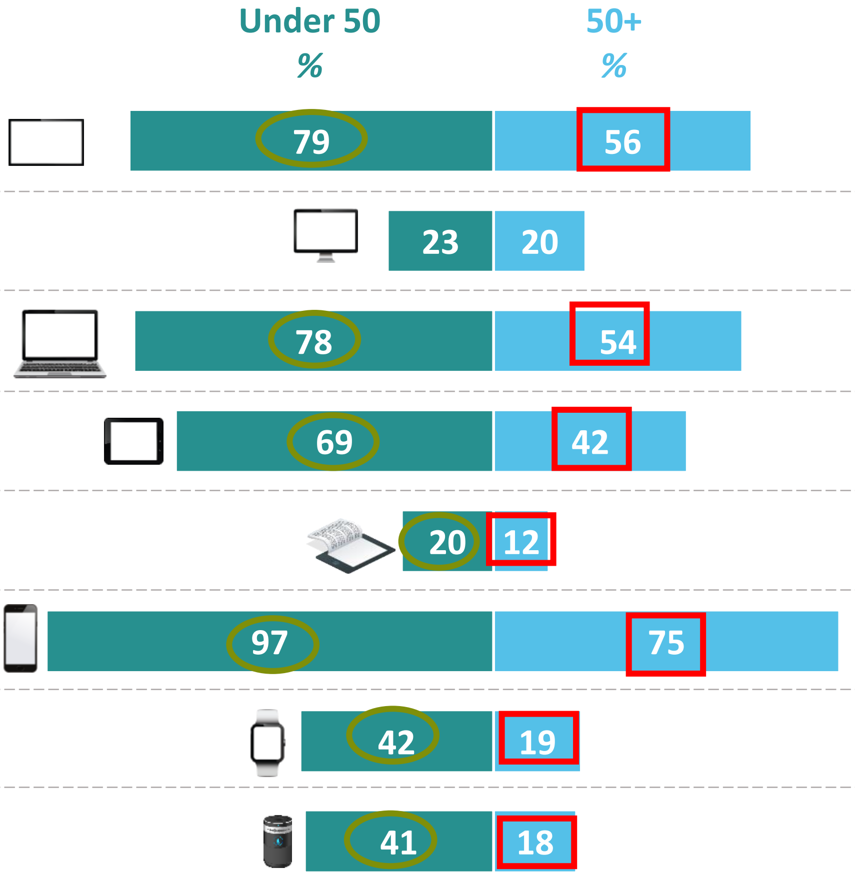
Those living in **Dublin are more likely to agree** that “BB is more important than TV” vs Non-Dubliners

○ = Significantly higher □ = Significantly lower

A Tech divide still exists

Aged under 50 Vs Aged 50+ and Generations comparison

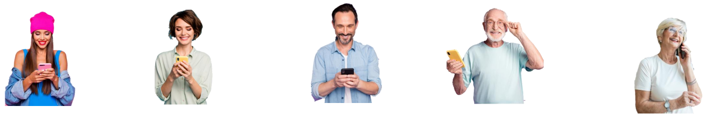
🟥 Significantly lower
🟩 Significantly higher



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

- Under 50 9 devices
- 50+ 5 devices

○ = Significantly higher ☐ = Significantly lower



	Gen Z %	Millennials %	Gen X %	Baby Boomers %	Silent Gen %
Smart TV	🟩 80	🟩 81	🟩 79	🟥 56	🟥 33
Desktop	🟩 39	🟥 16	🟩 30	19	17
Laptops	🟩 80	🟩 78	🟩 76	🟥 54	🟥 32
Tablets	🟩 75	🟩 68	🟩 66	🟥 41	🟥 29
eReaders	🟩 28	18	19	13	🟥 4
Smart phone	🟩 95	🟩 97	🟩 96	🟥 78	🟥 49
Wearable devices	🟩 46	🟩 44	37	🟥 17	🟥 3
Smart speaker	🟩 49	🟩 40	37	🟥 17	🟥 3

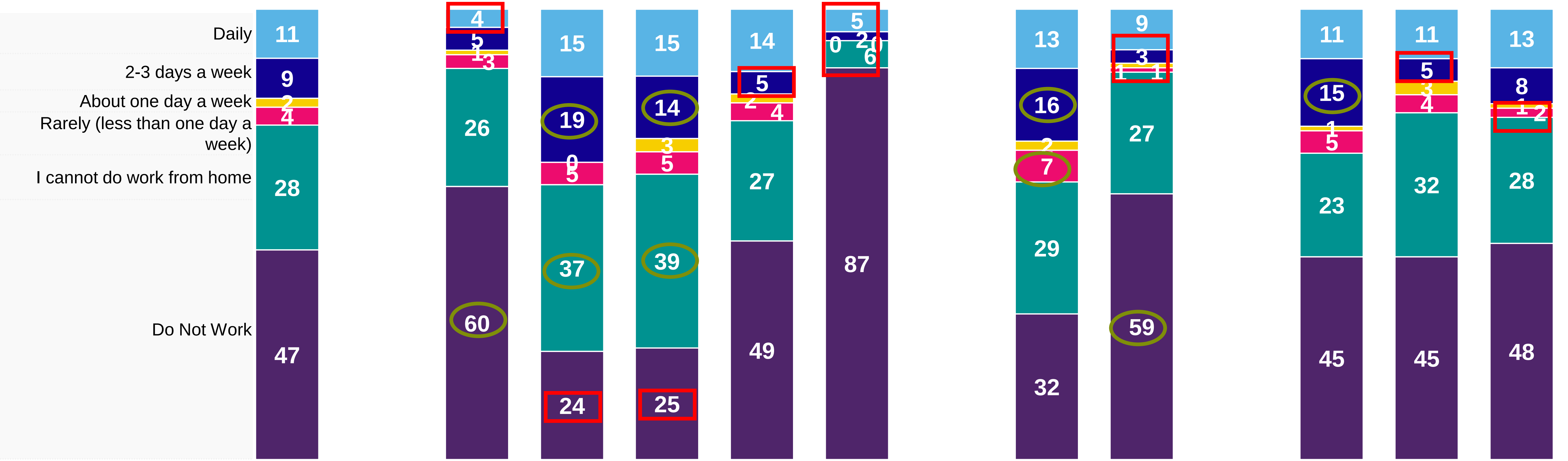
Clear divide between generations: number of smart devices in house

- Gen Z 12 devices
- Millennials 9 devices
- Gen X 9 devices
- Baby Boomers 5 devices
- Silent Gen 2 devices

Working from home is here to stay, but is more of a middle class, Dublin phenomena

Base: All respondents 1,003

Total		**Age**						**Social Class**			**Area**		
		16-24	25-34	35-49	50-64	65+		ABC1	C2DE		Dublin	Other Urban	Rural
1003		*125*	*154*	*281*	*252*	*191*		*486*	*517*		*291*	*305*	*327*
%		%	%	%	%	%		%	%		%	%	%



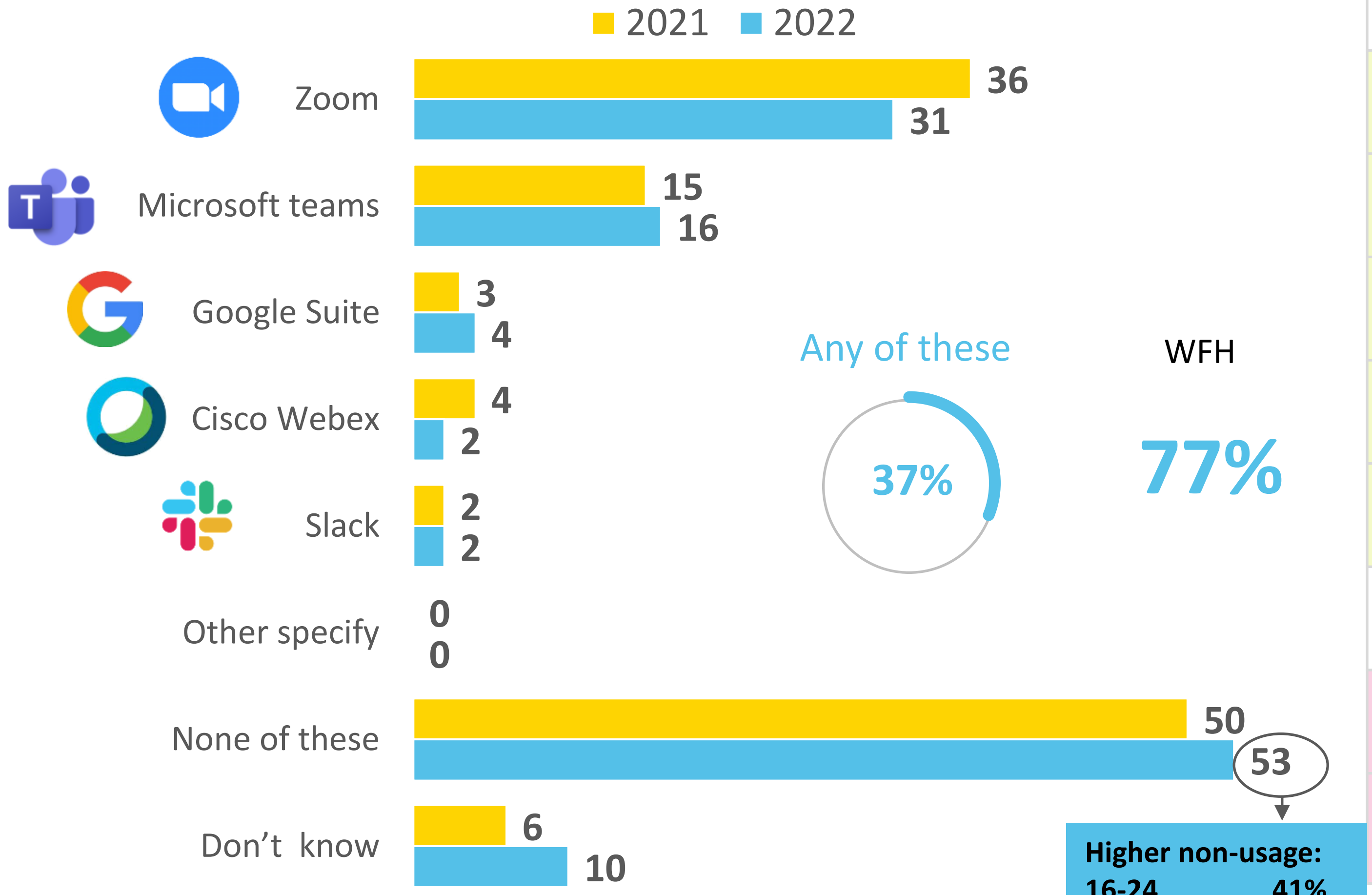
Any working from home	**25**		**14**	**39**	**36**	**24**	**7**		**39**	**14**		**33**	**23**	**24**
Any working 2+ days from home	**20**		**9**	**34**	**29**	**19**	**7**		**29**	**12**		**26**	**16**	**21**

○ = Significantly higher ▭ = Significantly lower

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

Zoom and Microsoft Teams remain the key video communications - note half the population does not use them.

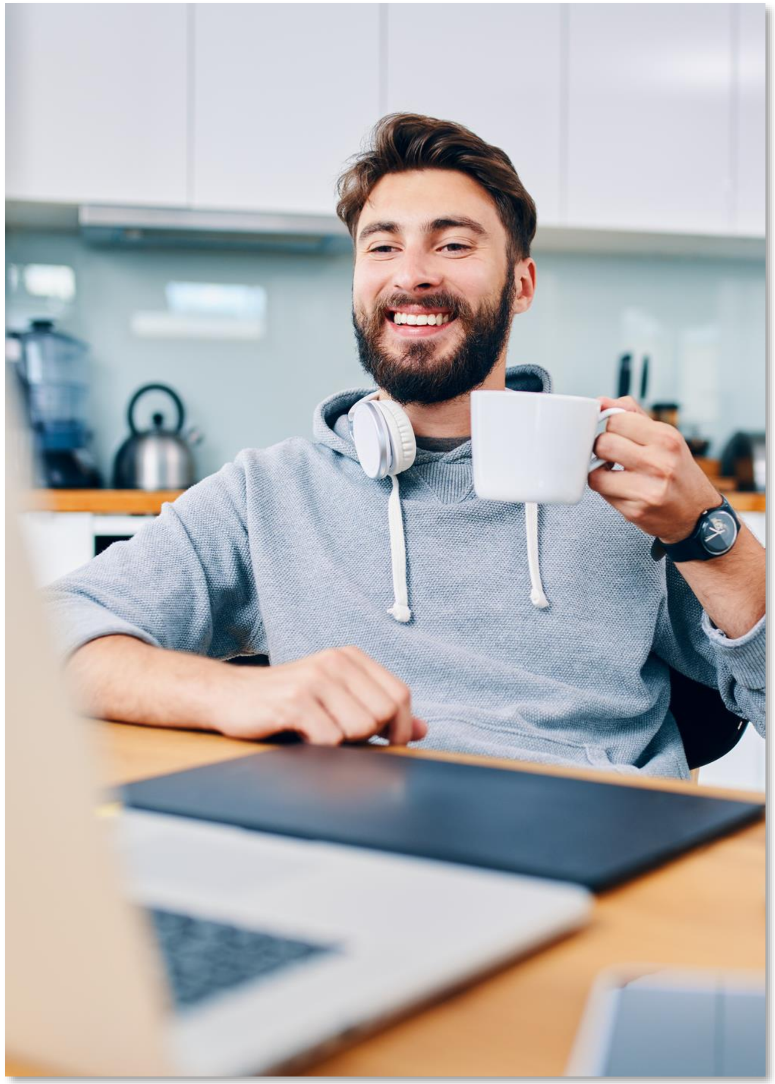
Base: All respondents 1,003



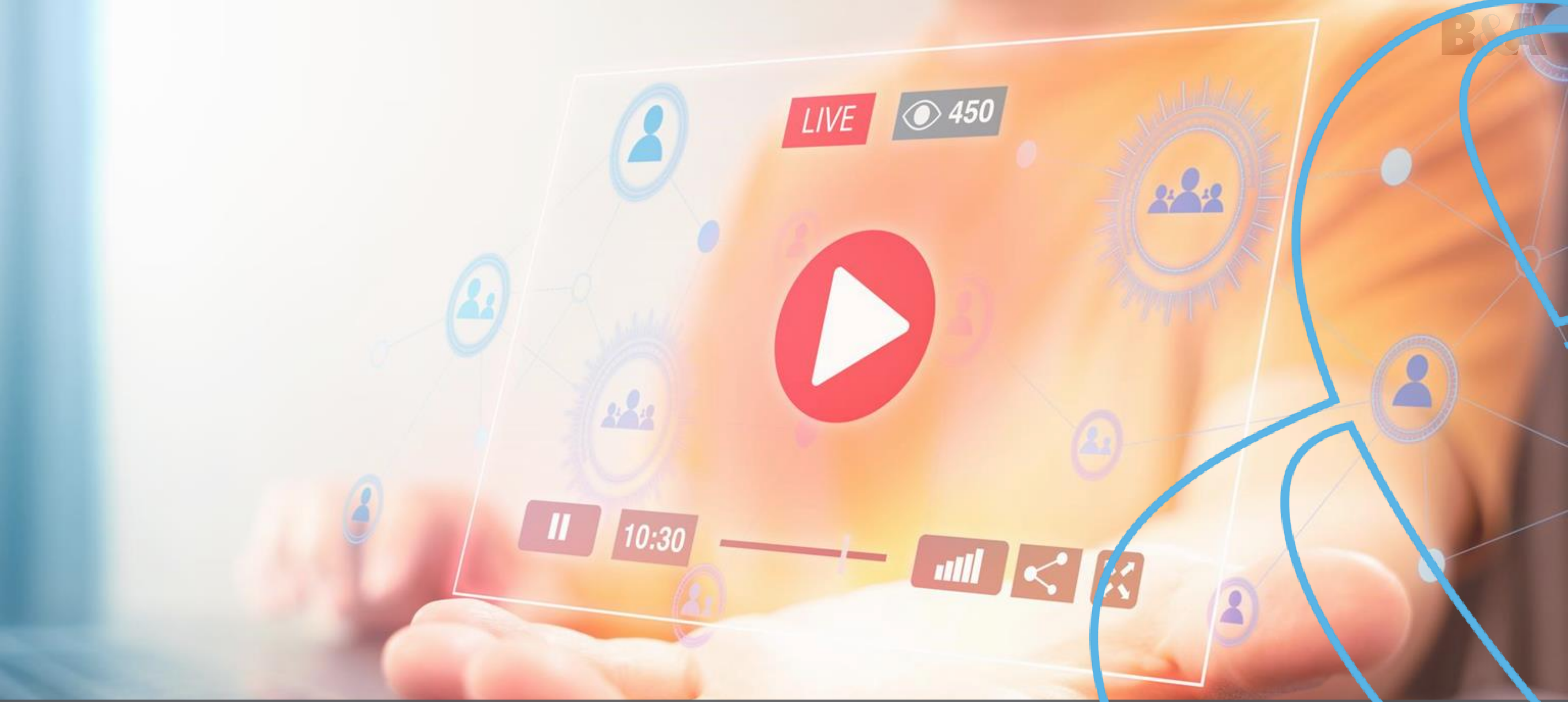
ALL currently working from home (Base: 248)
%
63
40
9
6
6
0
17
6

Higher non-usage:

16-24	**41%**
25-34	**40%**
35-49	**46%**
50-64	**57%**
65+	**76%**



Q.16 What platforms are you using nowadays?



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

We are more online

Increase in YOY daily internet usage as

(80%) **84%**

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

(33%) **41%**

Of those 74 yrs+ (Silent Gen)

now access the internet once a day or more often

9% of population never access the internet

()=2021 data

B&A

Generations

Gen Z 99%

Millennials 98%

Gen X 93%

Baby Boomers 69%

Silent Gen 41%

○ = Significantly higher

☐ = Significantly lower

Daily internet usage continues to grow amongst the 65+ age group at 52%, but a third (33%) are never online.

More than 4 in 5 of us access the internet once a day or more often but 33% of the over 65s are never online (a decrease from 43% in 2021)

Base: all Adults 16+ - 1,003

○ = Significantly higher

□ = Significantly lower

Daily internet usage continues to grow amongst the 65+ age group at 52%, but a third (33%) report they never use the internet.

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

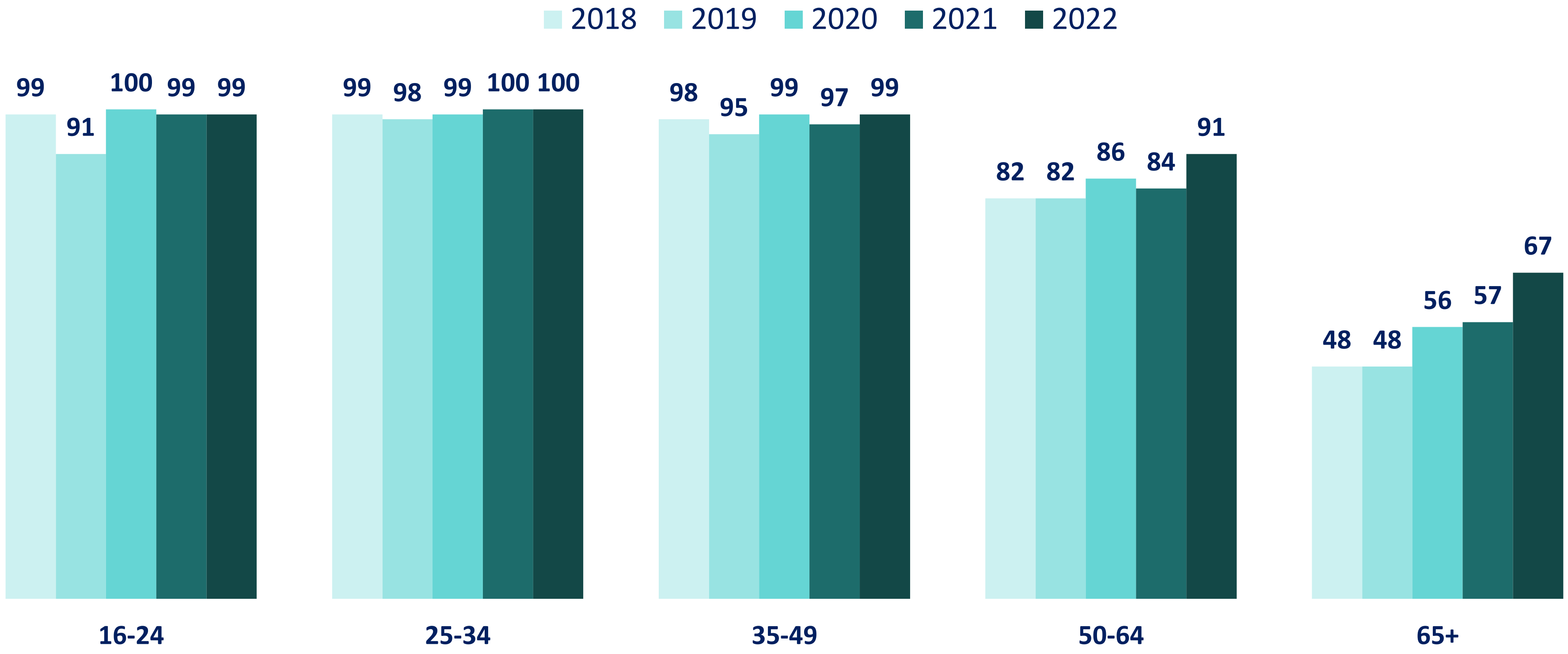
Note: 9% of the population still never access the internet (33% amongst those aged 65+).

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+ - 1,003



The use of the internet among people aged 65 and up has risen steadily over time.

How often do you yourself access the internet nowadays?

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

Digital financial products are growing

33%

(23% in 2021)

of Pop.

(almost 1,300,000 consumers)

now use digital financial products in Ireland

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

Driven by middle class and Dubliners

Region

Dublin

45%

Outside Dublin

28%

Social class

ABC1

44%

C2DE

23%

Generations

Gen Z 46%

Millennials 46%

Gen X 37%

Baby Boomers 16%

Silent Gen 2%

○ = Significantly higher

□ = Significantly lower

()=2021 data

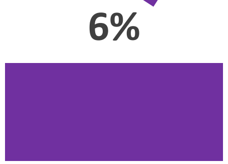
New payment methods are now prominent

Base: all Adults 16+ - 1,003

Who is ever using?	
Under 50	51%
Over 50	21%
ABC1	52%
C2DE	28%
Dublin	57%
Outside Dublin	32%

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)

Ever do nowadays



Who is dabbling?	
Under 35	11%
ABC1	9%
C2DE	3%

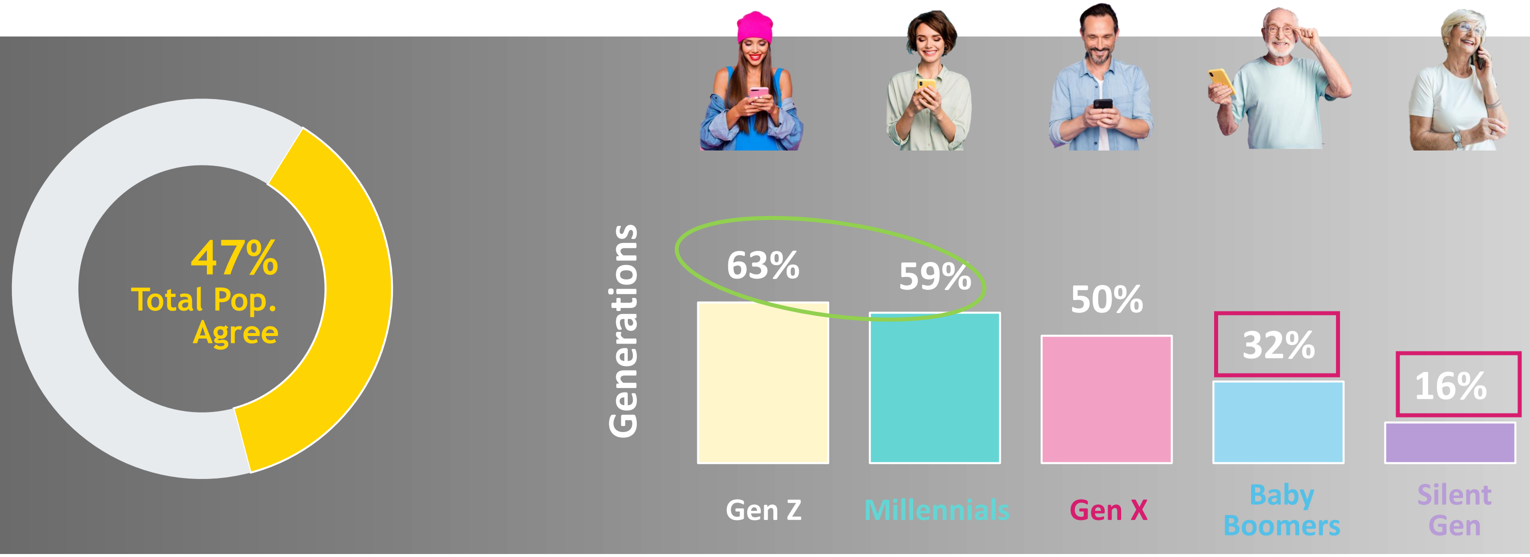
Owned/held, bought, or paid with cryptocurrency (e.g., Bitcoin, Ethereum, Litecoin, etc.)

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

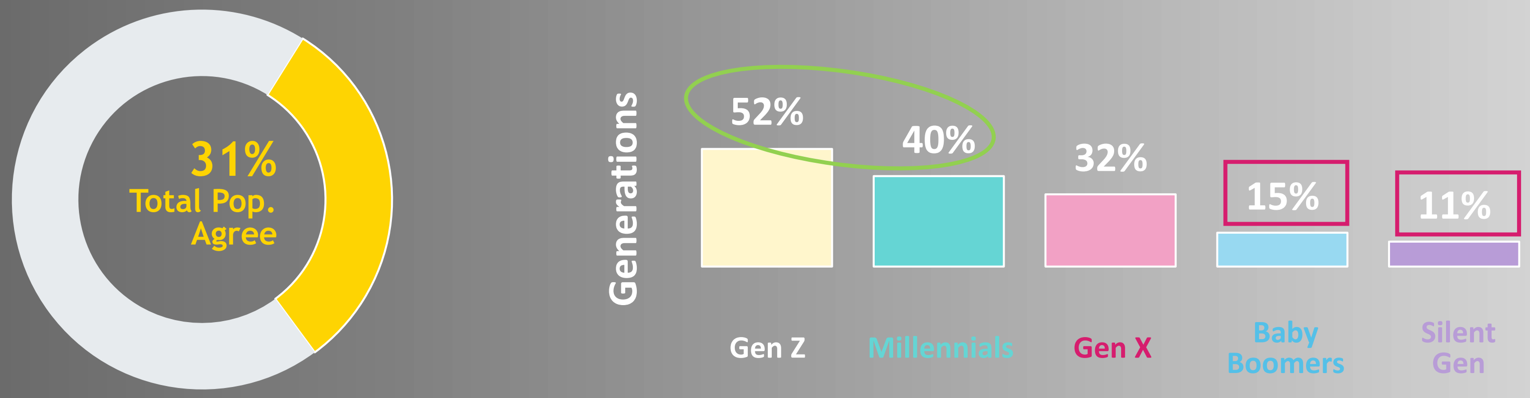
For about half the population broadband is more important than TV, especially for GenZ and Millennials. YouTube is a player for younger cohorts.

Base: all Adults 16+ - 1,003

Broadband is more important to me than TV



I am watching more content on YouTube than on live TV



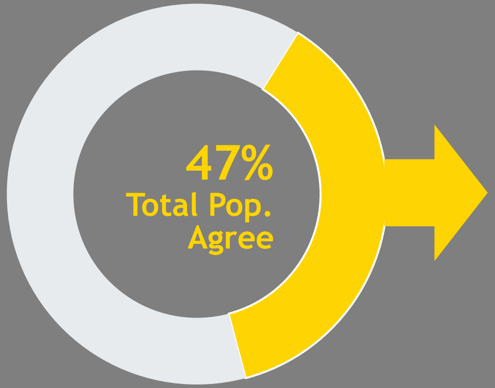
○ = Significantly higher ☐ = Significantly lower

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

Other demographics do impact the importance of broadband. A clear divide continues to exist with blue collar (C2DE) and Rural populations having a lower affinity with BB. Access issues will play a role here.

Base: all Adults 16+ - 1,003

Broadband is more important to me than TV



Social class

ABC1 54%

C2DE 41%

Region

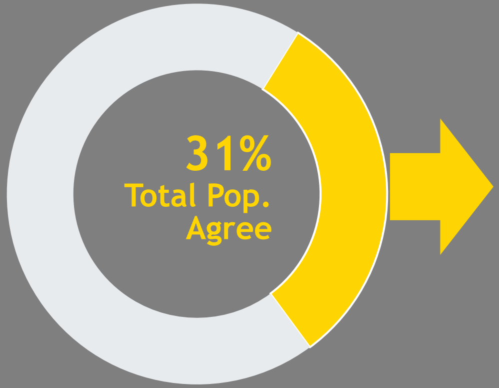
Dublin 56%

Other urban 52%

Rural 40%

I am watching more content on YouTube than on live TV

YouTube



Social class

ABC1 34%

C2DE 28%

Region

Dublin 37%

Other urban 27%

Rural 32%

○ = Significantly higher ☐ = Significantly lower

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

Continuous growth in paid and other streaming and digital banking…

Base: All adults 16+ - 1,003

Entertainment

(70%) 72%
Watch or listen to content on YouTube

Either = 74% (71%) (so Netflix people have Amazon Prime)

↑ (69%) 73%
Watch Netflix

↑ (33%) 38%
Watch Amazon Prime

↑ (24%) 29% Disney+

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

(48%) 48%
Stream music, via Spotify, Youtube, etc

(34%) 33%
Watch or stream live sports or other events online

(37%) 39%
Listen to Podcasts

(17%) 20%
Watch/stream movies/shows etc. via sites such as Showbox, Putlocker , etc.

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

(18%) 16%
Play Games online with others

Communications

The younger generation is driving growth in the entertainment and communications categories. This rise is being driven by Gen Z and Millennials among generations.

79% (75%) ↑
Use personal email

72% (68%) ↑
use instant messaging - WhatsApp, Facebook Messenger, Snapchat, Viber, Discord, Skype etc.)

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

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

42% (44%)
Use video calling/conferencing (e.g. Zoom, Microsoft Teams, Skype or Facetime, Google Duo, etc.)

30% (31%)
Use cloud applications (e.g. WeTransfer, One Drive, Dropbox, iCloud, Google Drive, Evernote etc.)

33% (23%) ↑
Digital financial products/banks such as Revolut, N26, Monzo

Which of these do you do nowadays anywhere?

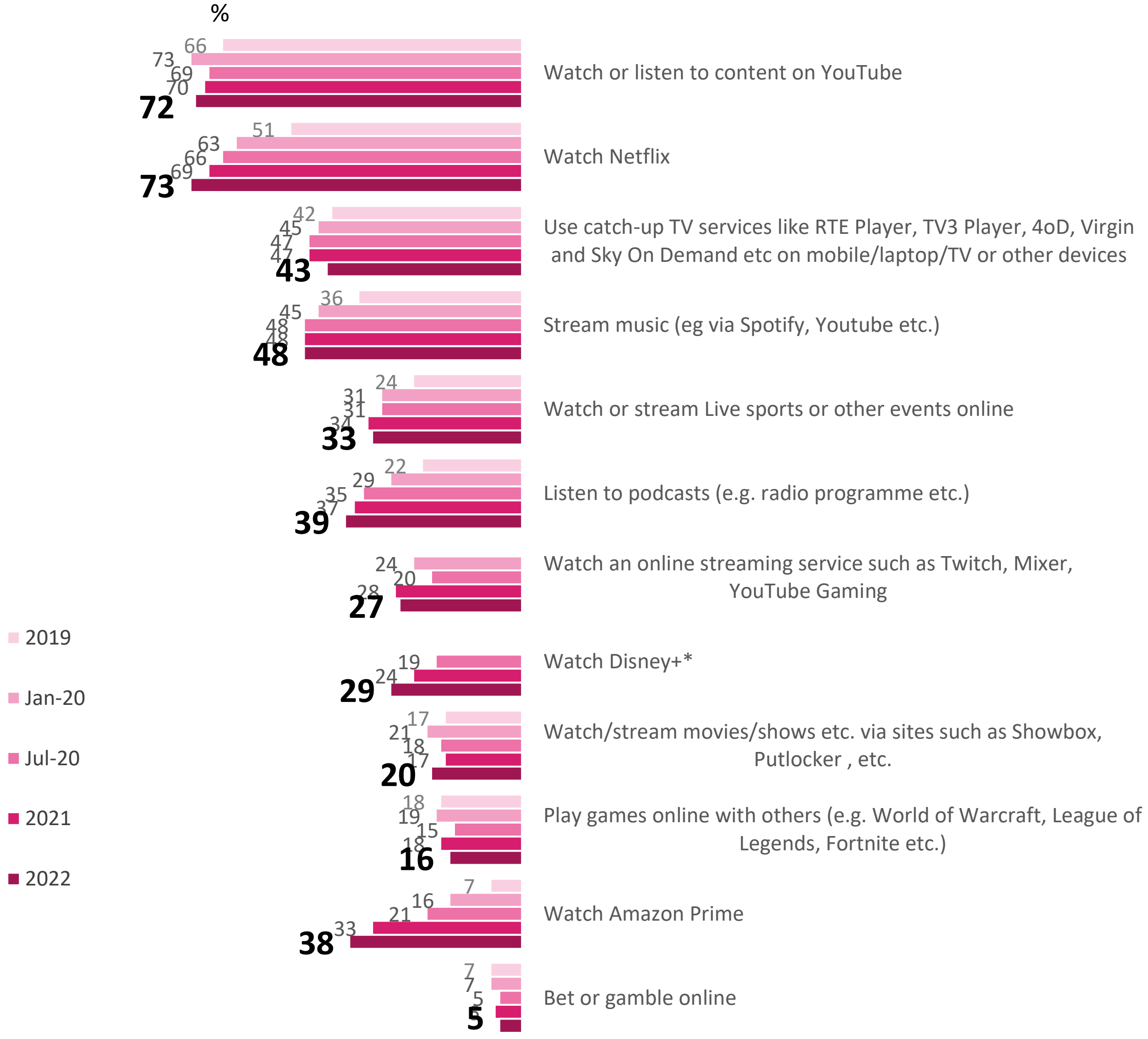
( ) = Brackets relate to 2021

Online services we are using nowadays - Trended

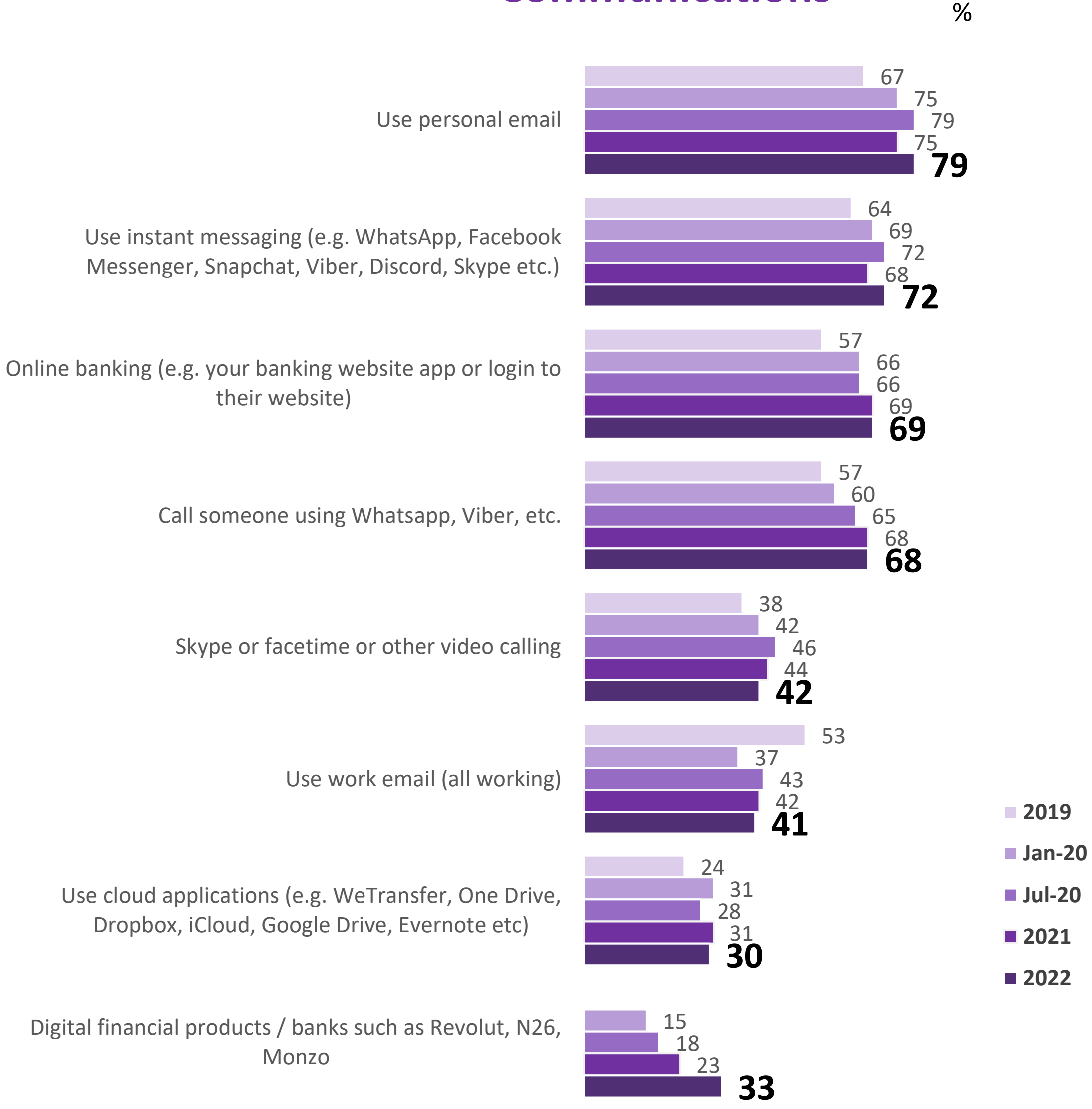
Base: All adults 16+ - 1,003

Continued growth in the use of online video streaming platforms. The use of online banking/ financial products & WhatsApp calls also continuing to grow.

Entertainment



Communications



Which of these do you do nowadays anywhere?

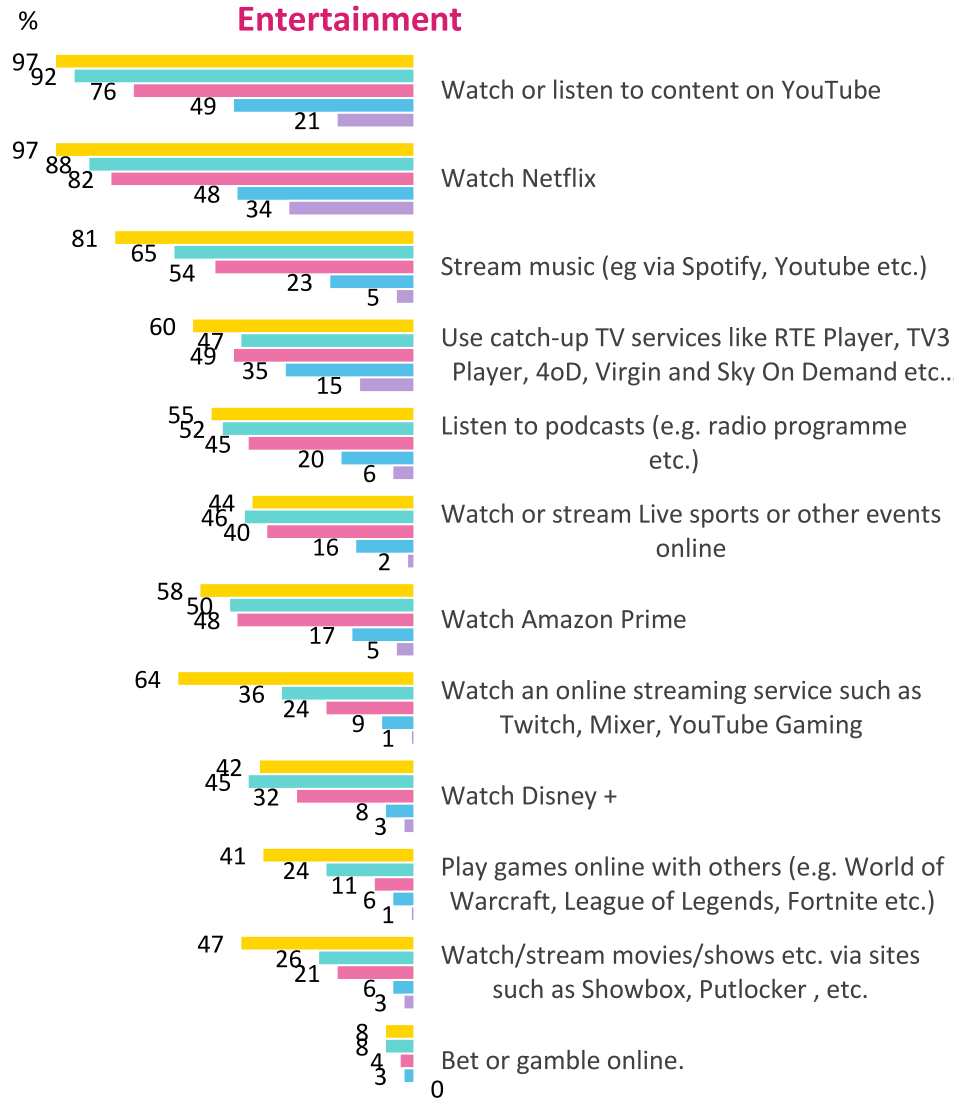
*Disney+ added July 2020

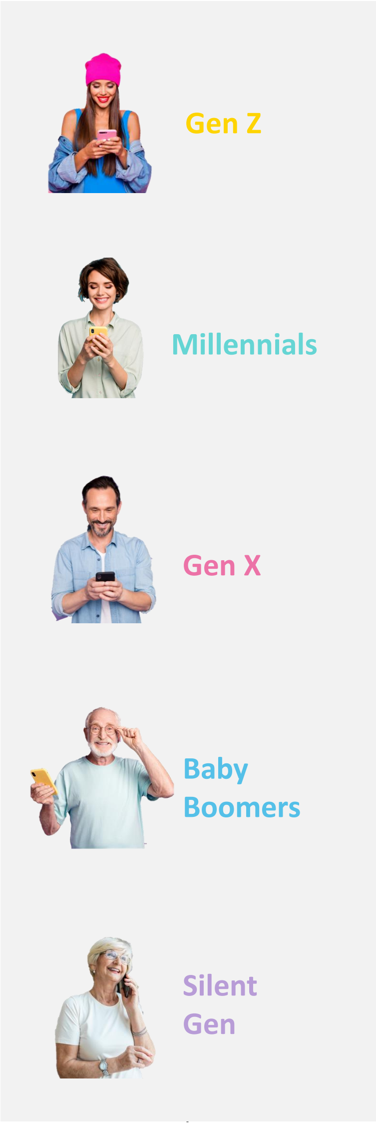
Online services we are using nowadays x Generations

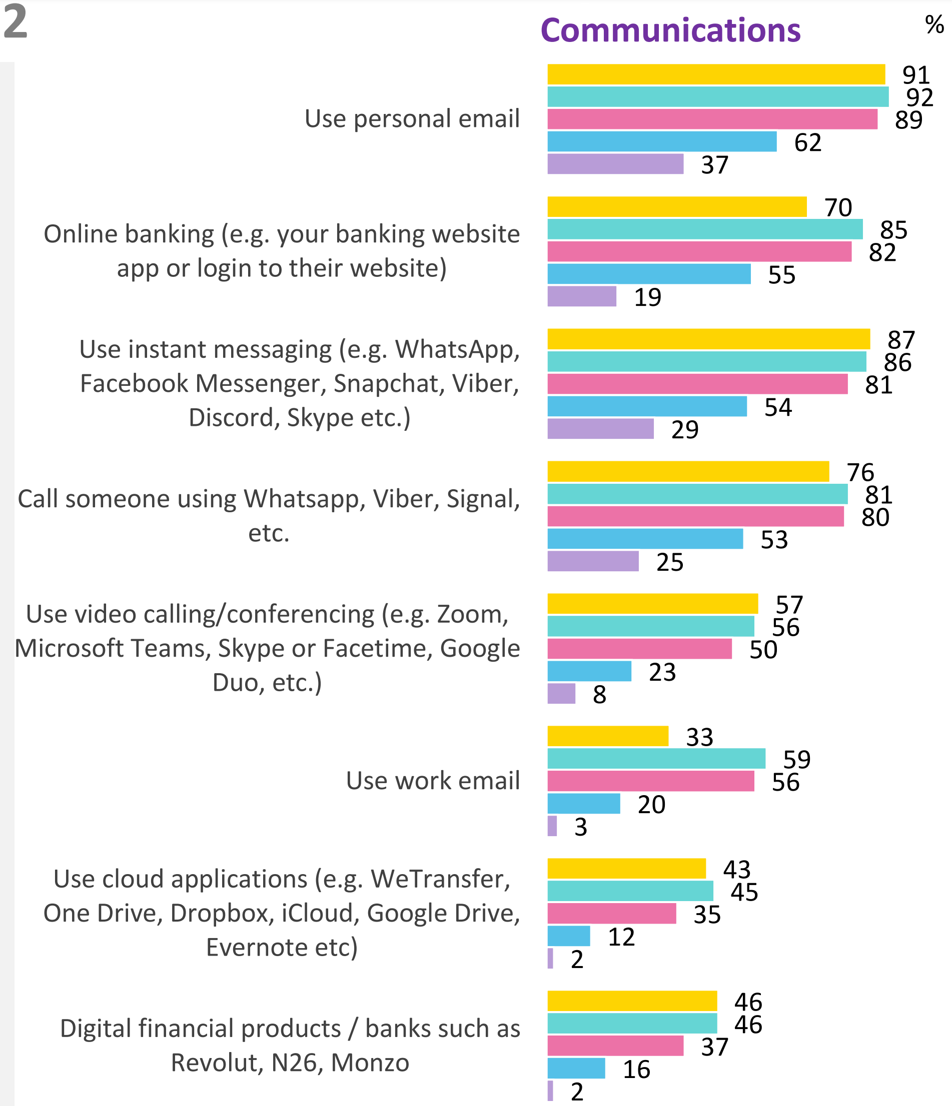
Base: All adults 16+ - 1,003

Generation Z and Millennials have remained the primary users of online services.

Generations 2022



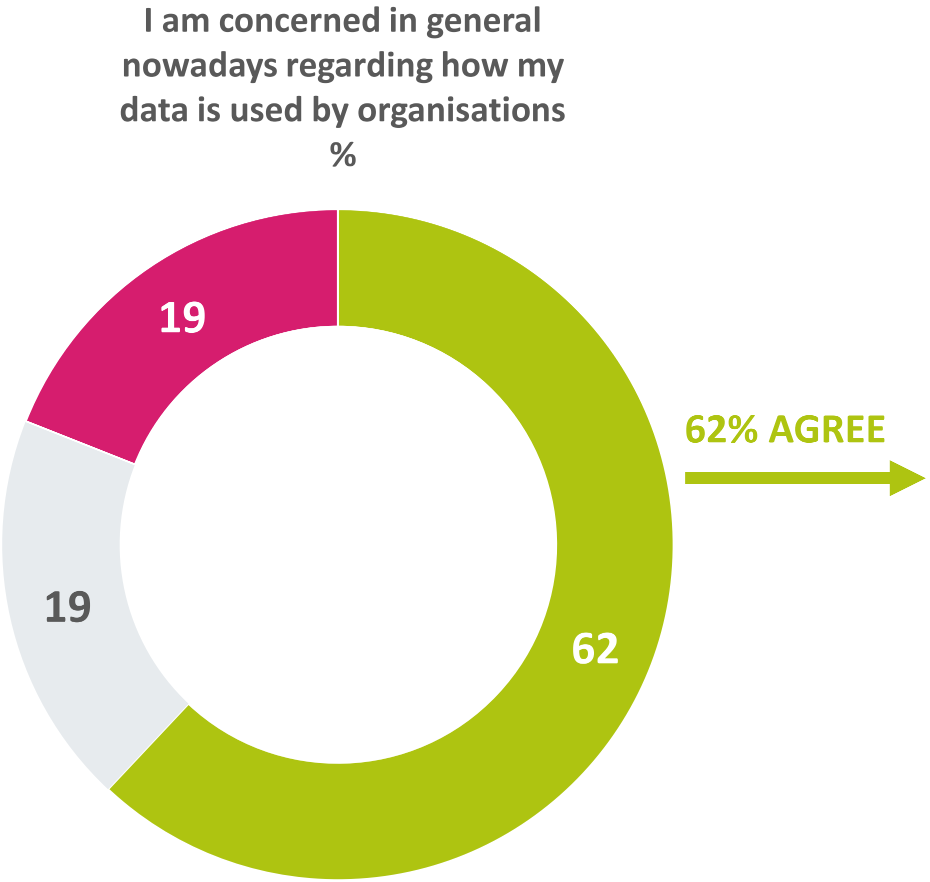




Which of these do you do nowadays anywhere?

3 in 5 are concerned about how their data is being used by organisations

Base: All adults 16+ - 1,003



AGE

Under 50	69%
Over 50	53%

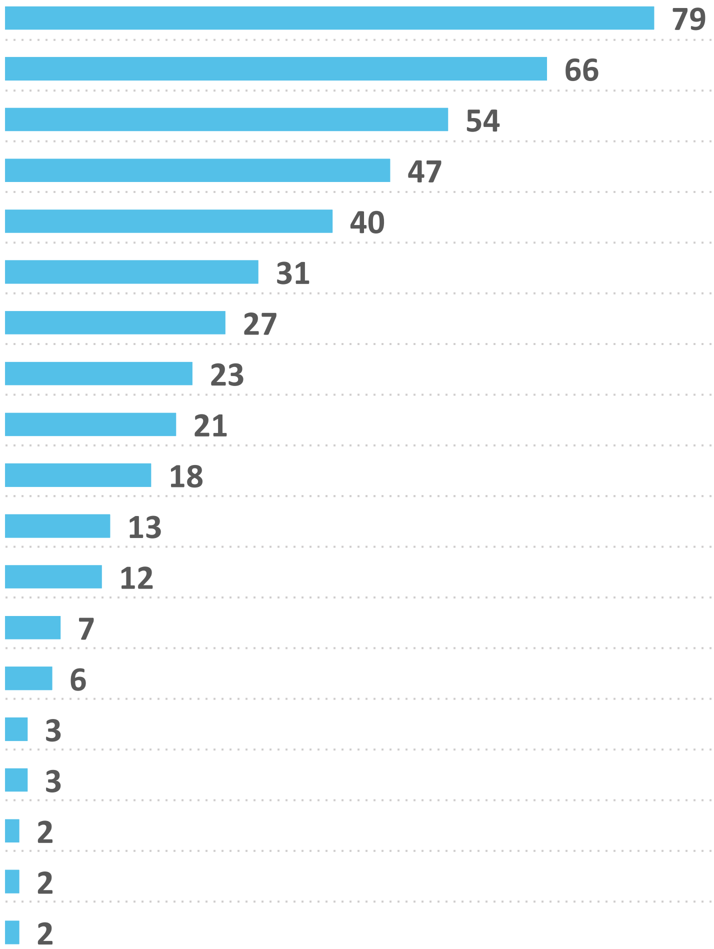
CLASS

ABC1	70%
C2DE	56%

Social animals

TikTok now more popular than Twitter

Base: All Adults 16+ - 1,003

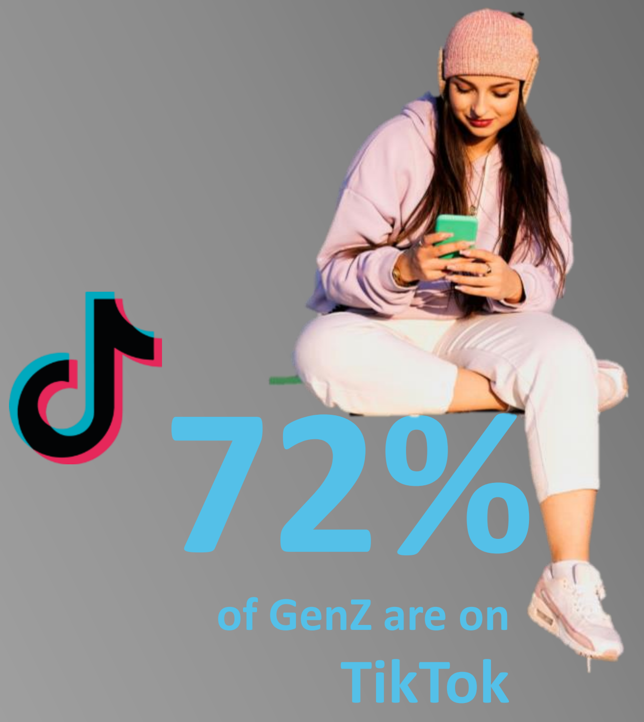


May 21		May 2022	Change vs May 2021
%			%
71	What's App	79	+8
58	Facebook *	66	+8
52	Facebook Messenger	54	+2
45	Instagram *	47	+2
42	Spotify	40	-2
31	Snapchat *	31	=
21	TikTok	27	+6
22	Twitter *	23	+1
21	LinkedIn *	21	=
20	Viber/ Viber Messenger	18	-2
12	Pinterest *	13	+1
11	Sound Cloud	12	+1
7	Reddit	7	=
6	Tinder +	6	=
3	Twitch	3	=
2	Signal	3	+1
3	Bumble +	2	-1
2	Plenty Of Fish +	2	=
2	Tumblr	2	=

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

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

Facebook and WhatsApp continue to remain the most popular social media and OTT services used in 2022

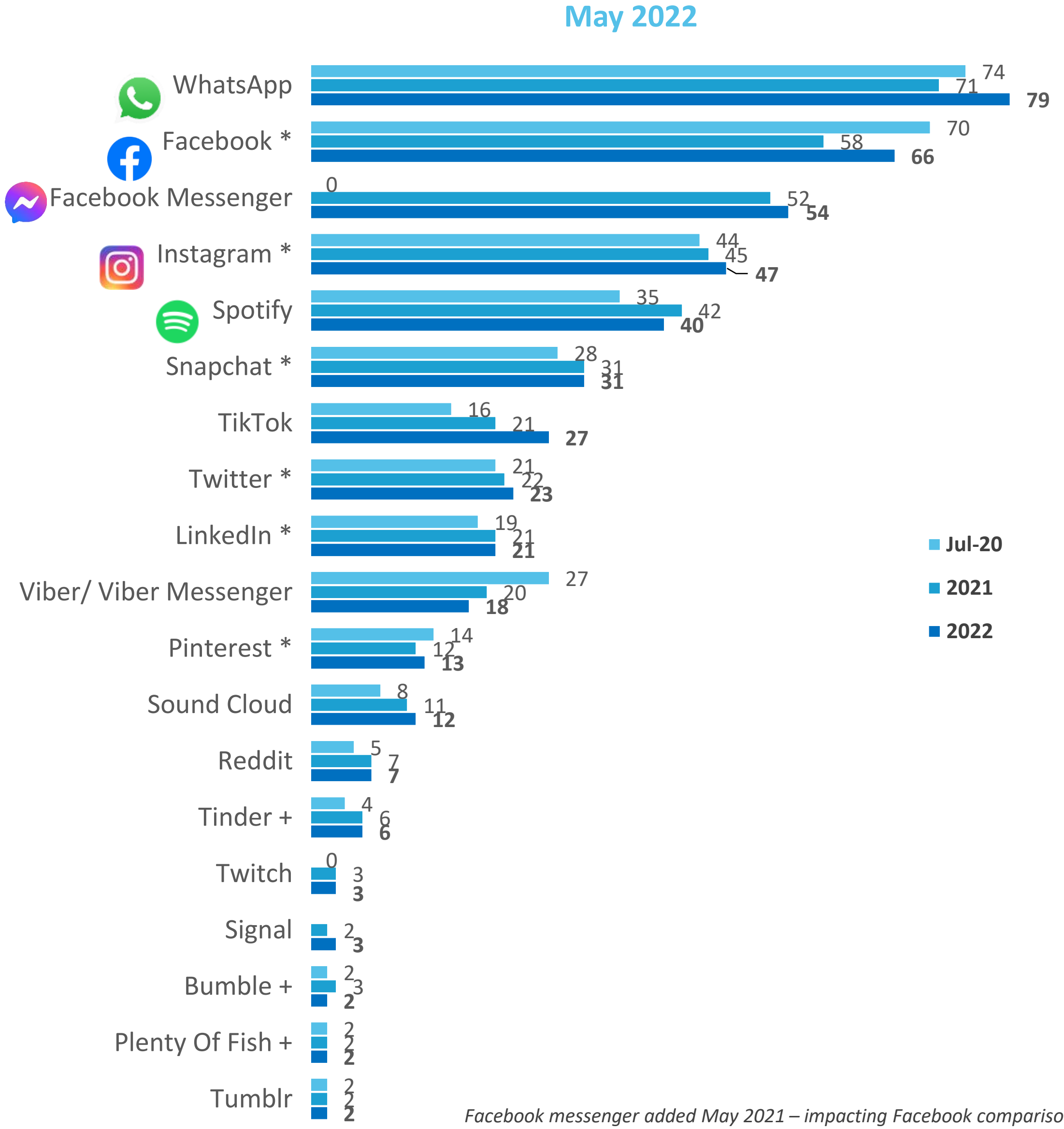


72%

of GenZ are on TikTok

Social media platforms we are using nowadays - Trended

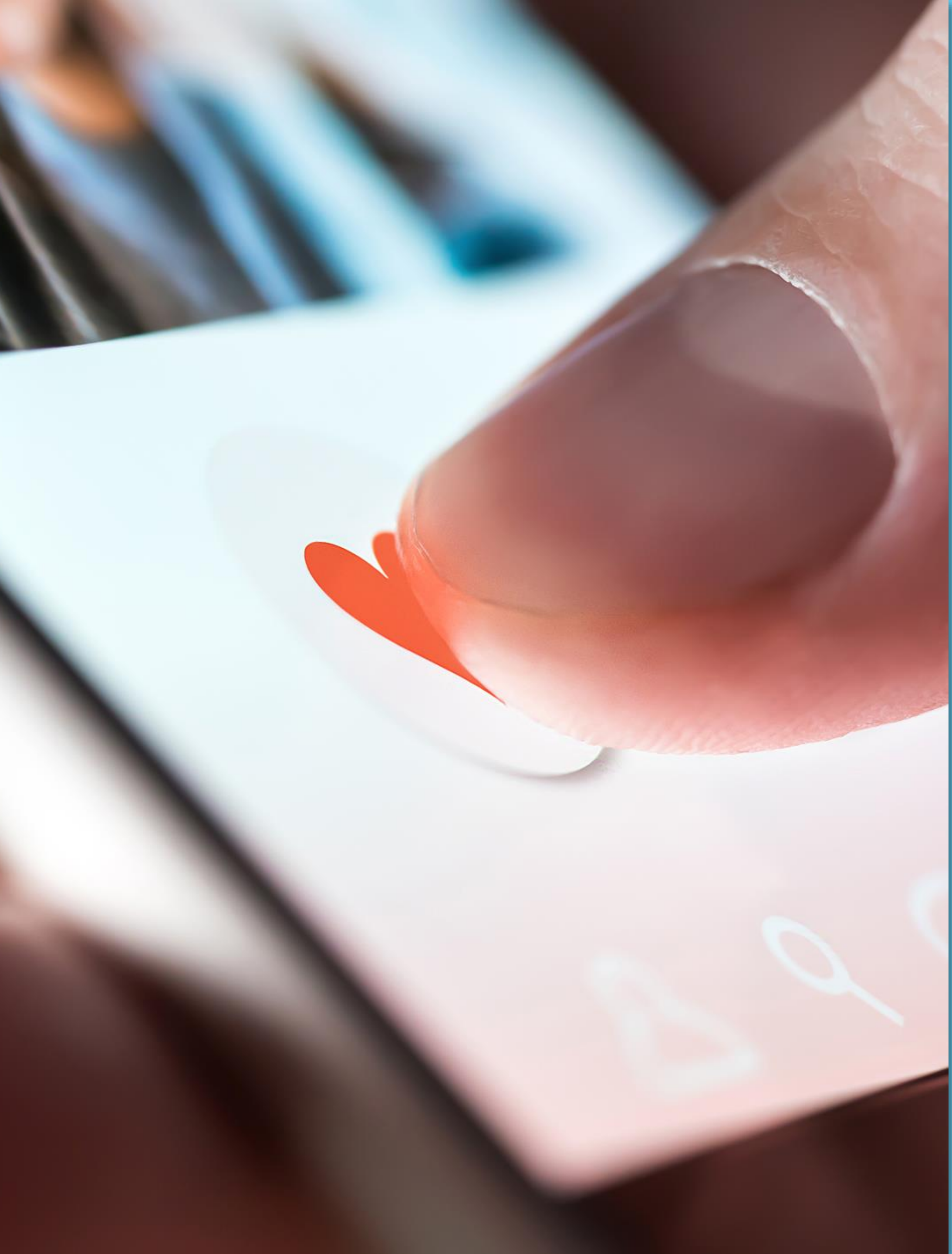
Base: All Adults 16+ - 1,003



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

Tik Tok also continues its upward trajectory ↑11 percentage points from 16% in May 20 to 27% in May 2022

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



TikTok

72%

GenZ are on TikTok

Total population 27%

B&A

Generations

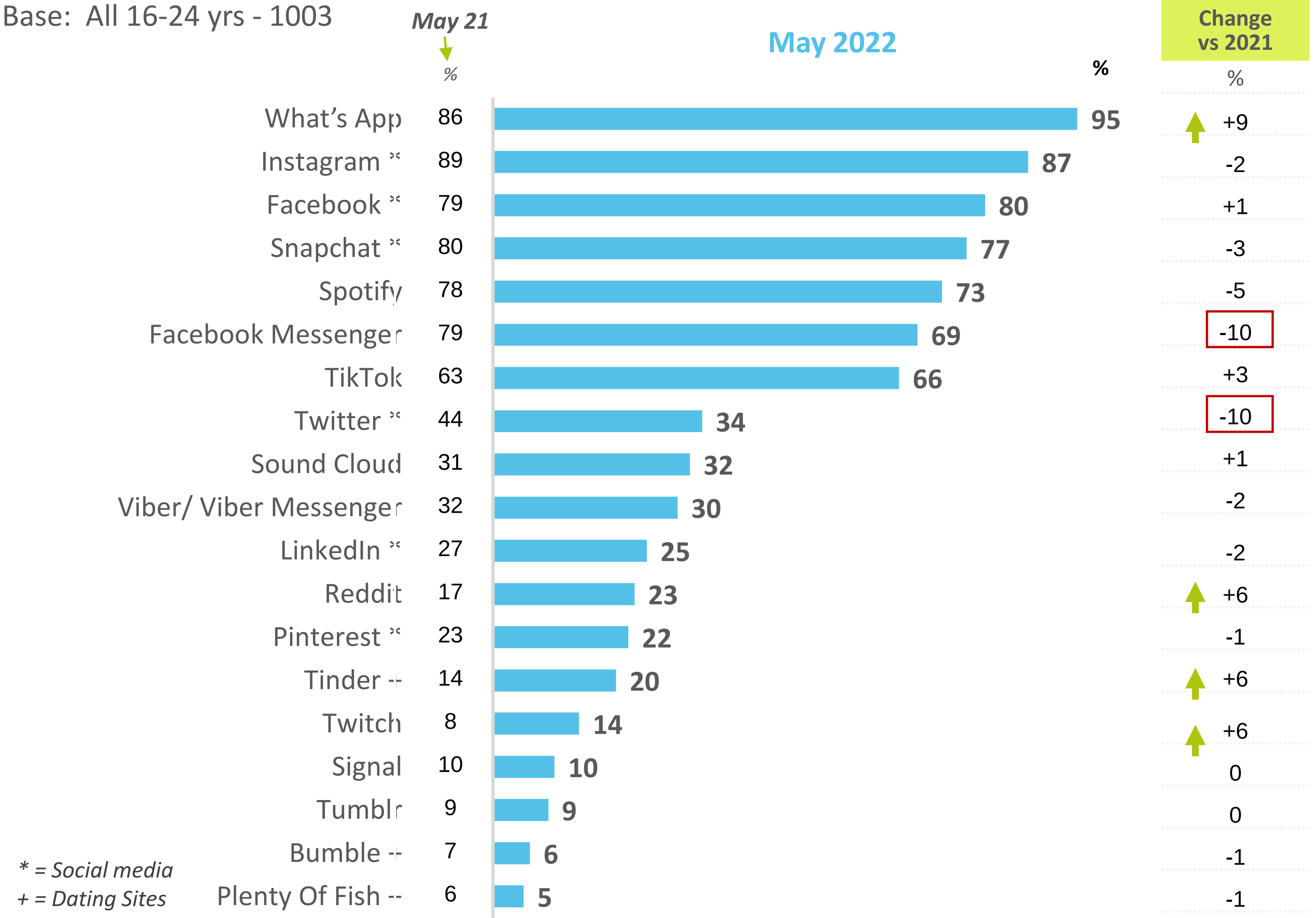
Gen Z	72%
Millennials	41%
Gen X	17%
Baby Boomers	7%
Silent Gen	2%

○ = Significantly higher

□ = Significantly lower

Instagram is the most popular social media platform among 16-24 year olds, with WhatsApp, Tinder, and Twitch seeing the most significant increase in usage among this age group over the past year.

Base: All 16-24 yrs - 1003



May 2022

	May 21 %	May 2022 %	Change vs 2021 %
What's App	86	95	+9
Instagram *	89	87	-2
Facebook *	79	80	+1
Snapchat *	80	77	-3
Spotify	78	73	-5
Facebook Messenger	79	69	-10
TikTok	63	66	+3
Twitter *	44	34	-10
Sound Cloud	31	32	+1
Viber/ Viber Messenger	32	30	-2
LinkedIn *	27	25	-2
Reddit	17	23	+6
Pinterest *	23	22	-1
Tinder +	14	20	+6
Twitch	8	14	+6
Signal	10	10	0
Tumblr	9	9	0
Bumble +	7	6	-1
Plenty Of Fish +	6	5	-1

* = Social media
\+ = Dating Sites

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

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

16-24s

95%

87%

80%

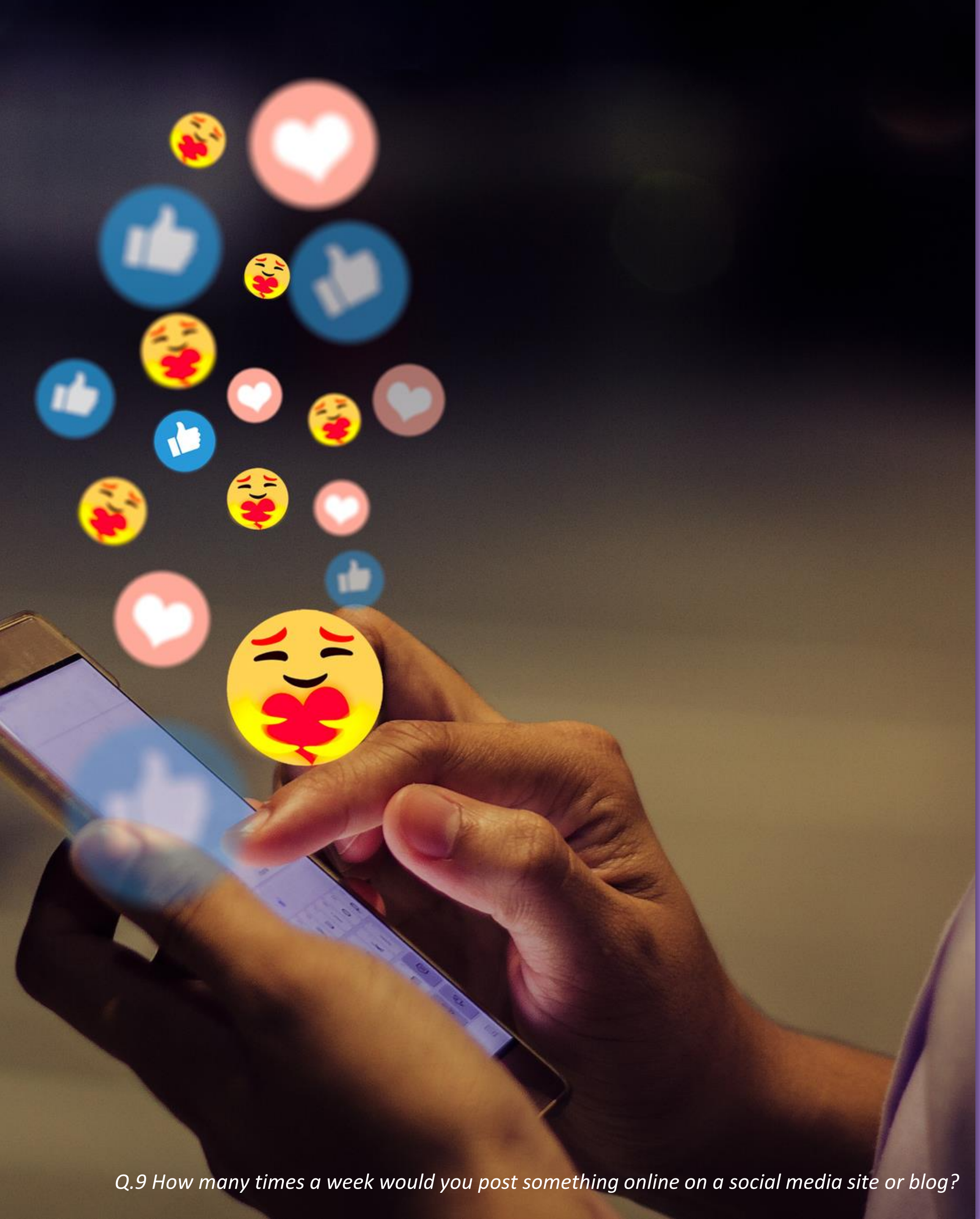
77%

73%

69%

66%

Facebook Messenger and Twitter declining amongst 16-24's



Among those who share posts online (43%), the average number of weekly posts is

5

(4 in 2020)

Base: All who post online n = 426

Generations

Gen Z	9	*(6)*
Millennials	5	*(4)*
Gen X	3	*(3)*
Baby Boomers	4	*(4)*
Silent Gen	2	*(9)*

() 2021

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

43%

claim that they are getting tired of Facebook

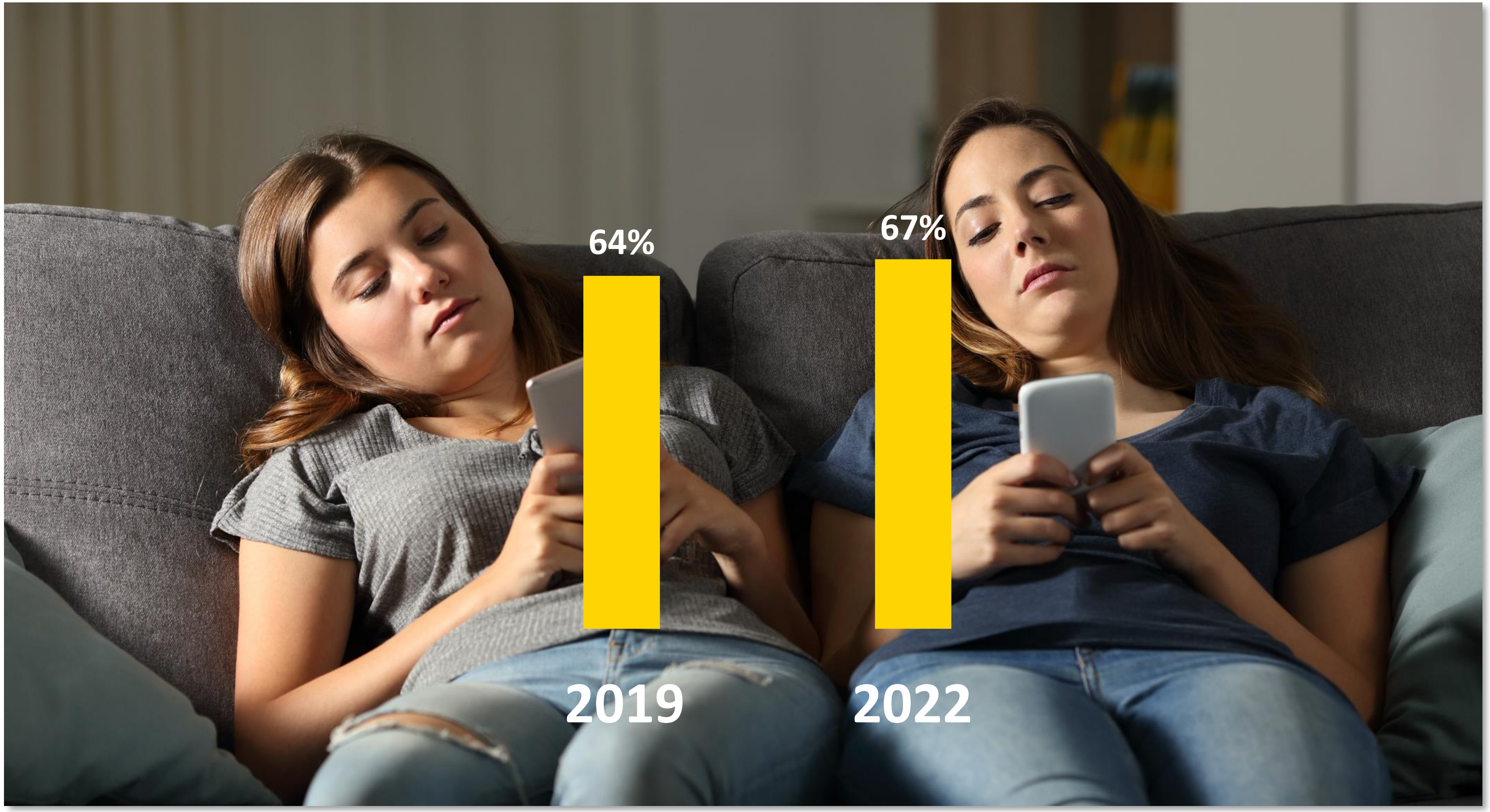
Significantly higher amongst Millennials.

Q.7 Do you agree with the statement – I'm getting tired of Facebook?

Generations

	Gen Z	50%
	Millennials	50%
	Gen X	41%
	Baby Boomers	33%
	Silent Gen	7%

The number of people who believe that we have lost the art of conversation remains high.



Age

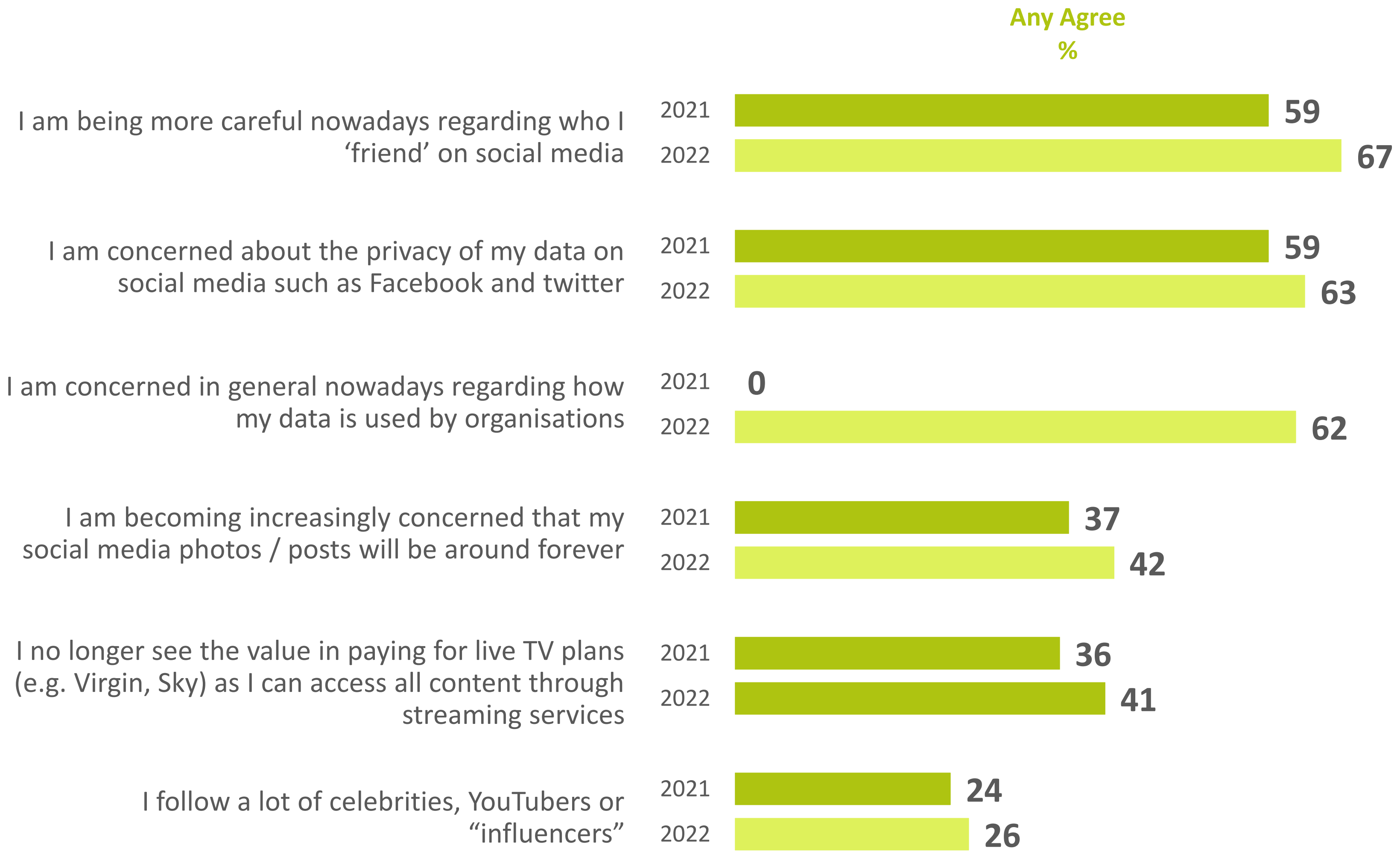
	2020	2021	2022
	%	%	%
16-24	47	52	52
25-34	61	64	62
35-49	68	60	64
50-64	67	60	75
65+	69	49	74

The 50+ age group is driving the increase – those under 25 are increasingly disagreeing! (They have grown up this way)

○ = Significantly higher □ = Significantly lower

Higher social media concern 2022 vs. 2021

Base: All adults 16+ - 1,003



67%

Total Pop.
(+8%pts vs 2020)

I am being more careful nowadays regarding who I 'friend' with on social media

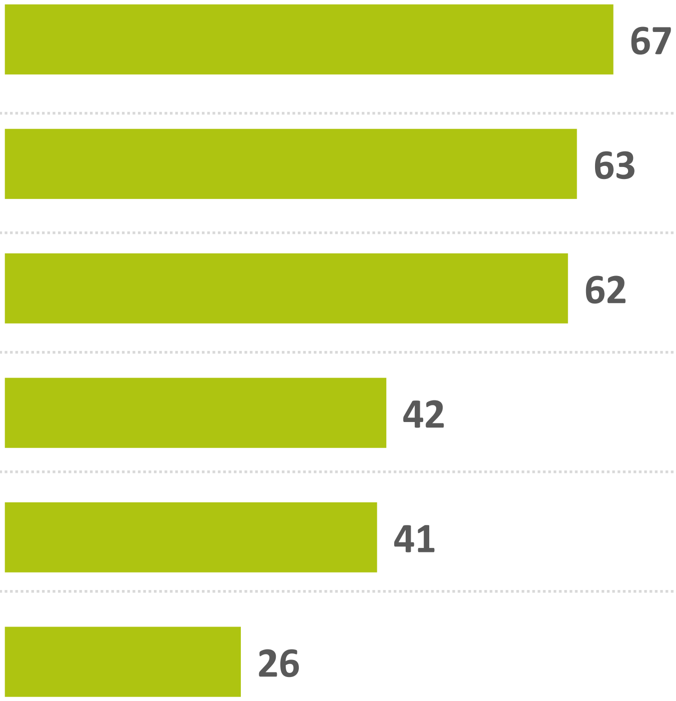
Q.13 To what extent do you agree or disagree ...

Millennials shows the highest level of concern regarding their social media behaviour

Base: All adults 16+ - 1,003

Generation

Any agree 2022



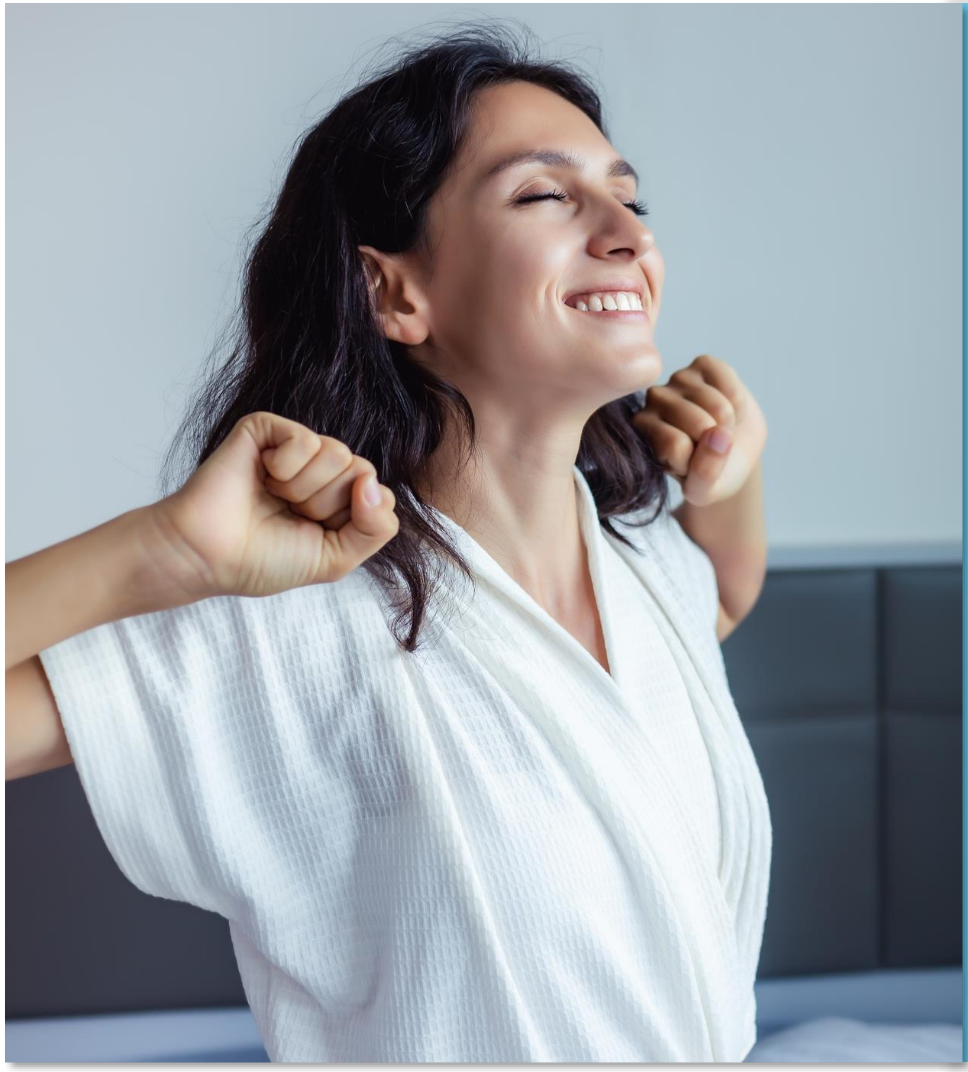
	Any agree 2022 %	Gen Z 125 %	Millennials 154 %	Gen X 281 %	Baby Boomers 252 %	Silent Gen 191 %
I am being more careful nowadays regarding who I 'friend' on social media	67	80	79	76	48	30
I am concerned about the privacy of my data on social media such as Facebook and twitter	63	66	72	72	54	34
I am concerned in general nowadays regarding how my data is used by organisations	62	65	70	67	53	44
I am becoming increasingly concerned that my social media photos / posts will be around forever	42	52	52	41	32	22
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	41	50	55	45	25	13
I follow a lot of celebrities, youtubers or "influencers"	26	66	32	21	9	8

○ = Significantly higher □ = Significantly lower

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

People are trying to Switch off:

The number of people who check their emails, texts, or social media first thing in the morning has decreased.



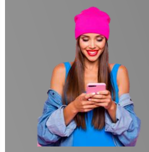
42%

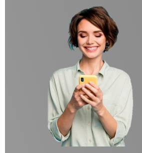
check emails, text messages, or social media first thing in the morning

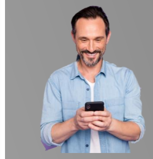
(58% in 2021 / 57% in 2020)

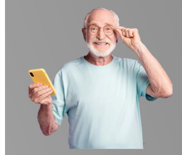
Base: All Adults 16+ who use SM (866)

Generations







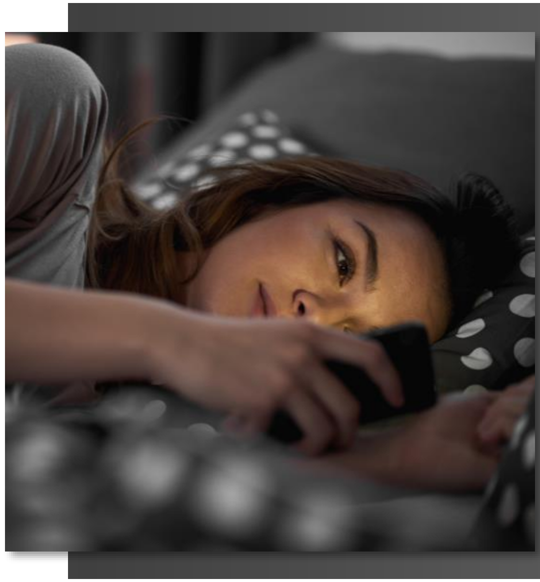


Gen Z	63%
Millennials	47%
Gen X	41%
Baby Boomers	28%
Silent Gen	11%

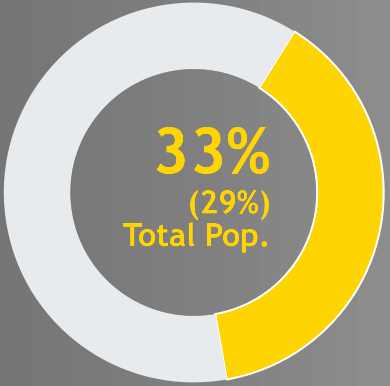
○ = Significantly higher ☐ = Significantly lower

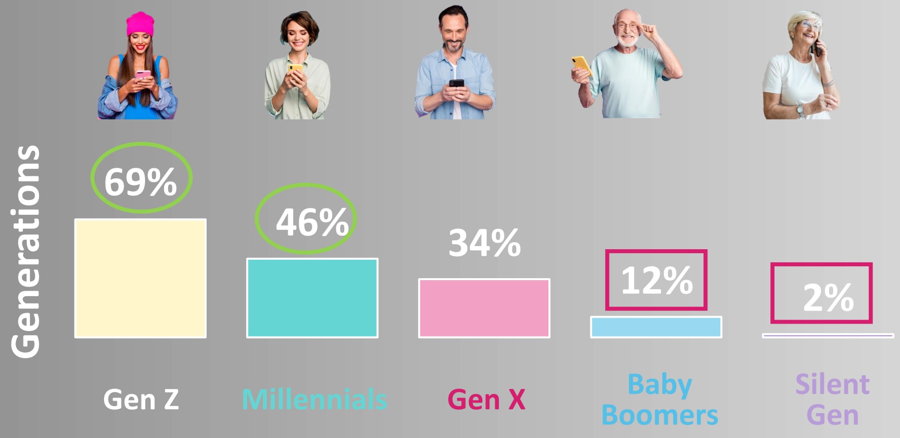
However, more of us are checking social media/emails when having difficulty sleeping.

○ = Significantly higher ▭ = Significantly lower

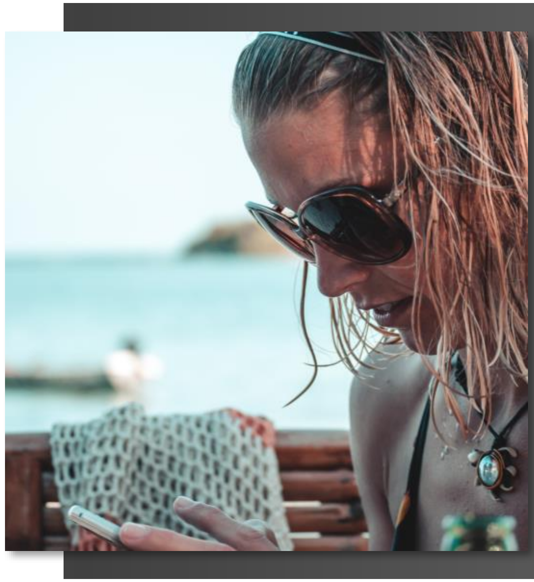


Check social media or emails when having difficulty sleeping



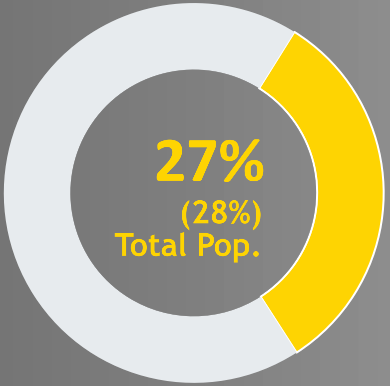


Base: All Adults 16+ who use SM (1003)

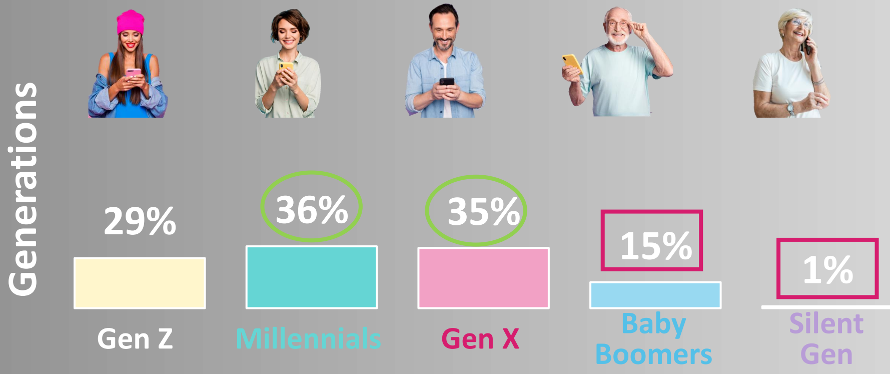


Check work emails when on holidays

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



(41% amongst all working)

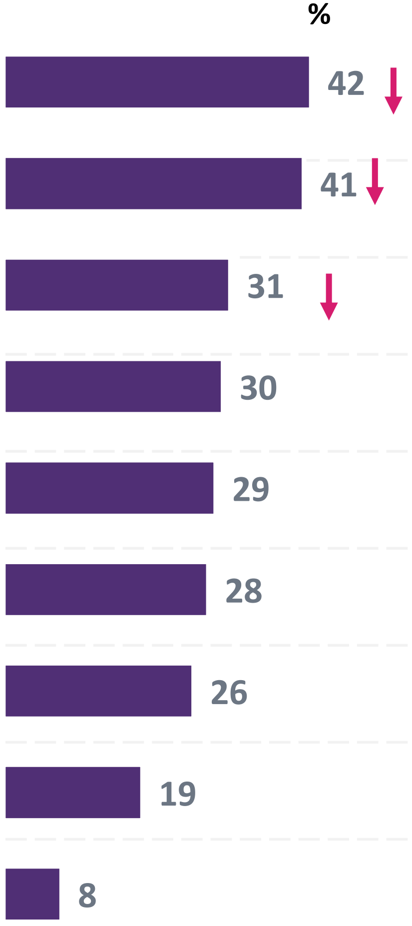


()=2021 data

Some of us are trying to switch off and detox but it is difficult.

Base : Use Social Media Sites 866

◯ = Significantly higher □ = Significantly lower

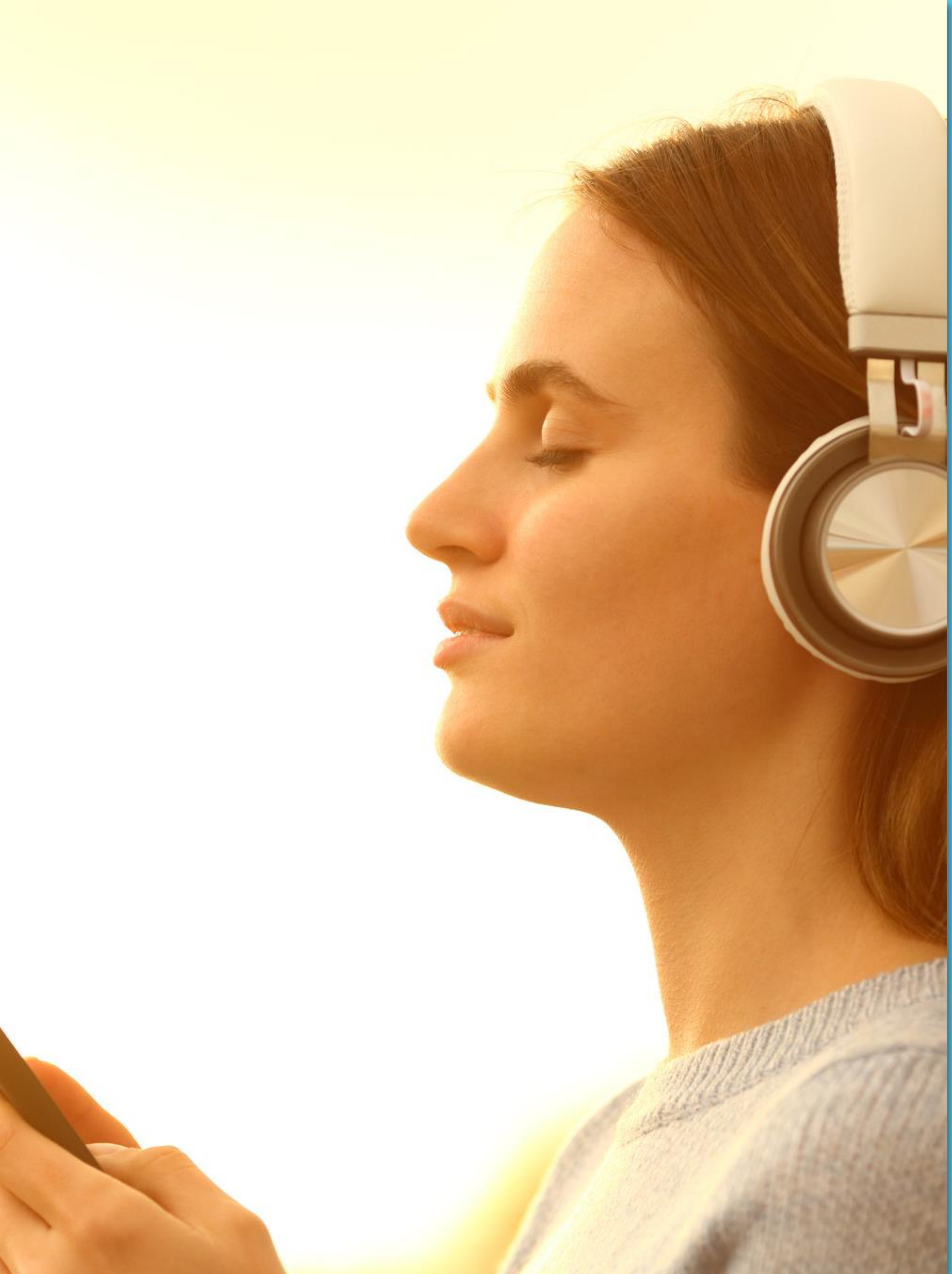


	2021	%	Gen Z	Millennials	Gen X	Baby Boomers	Silent Gen
			111	293	146	137	15
			%	%	%	%	%
The first thing I do in the morning is check emails, text messages, or social media sites	51	42 ↓	63 ◯	47	41	28 □	11 □
The last thing I do at night is check emails, text messages or social media sites	47	41 ↓	68 ◯	47 ◯	37	22 □	8 □
I can't imagine my life without social media	42	31 ↓	59 ◯	36	20 □	22 □	4 □
I know someone who has been bullied on social media	29	30	57 ◯	37 ◯	21 □	16 □	7 □
I try and take a social media detox (staying away from it) every now and then	n/a	29	40 ◯	35	26	20 □	9 □
I use social media sites in order to fit in with my friends / peers	28	28	53 ◯	30	23	19 □	17
I would rather not be on social media but I am afraid of missing out on what's going on around me	25	26	37 ◯	32 ◯	19 □	17 □	22
I'd hate to be the type of person who only has a few friends on social media such as Facebook	20	19	34 ◯	24	10 □	12 □	6 □
I have been personally bullied on social media	6	8	20 ◯	10	4	2 □	2 □

Generation

* All those who are working

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



21%

use apps to help them meditate/ relax/ disconnect from the world

(Peaks amongst GenZ and Millennials)

Generations

	Gen Z	38%
	Millennials	27%
	Gen X	24%
	Baby Boomers	10%
	Silent Gen	1%

Online activities

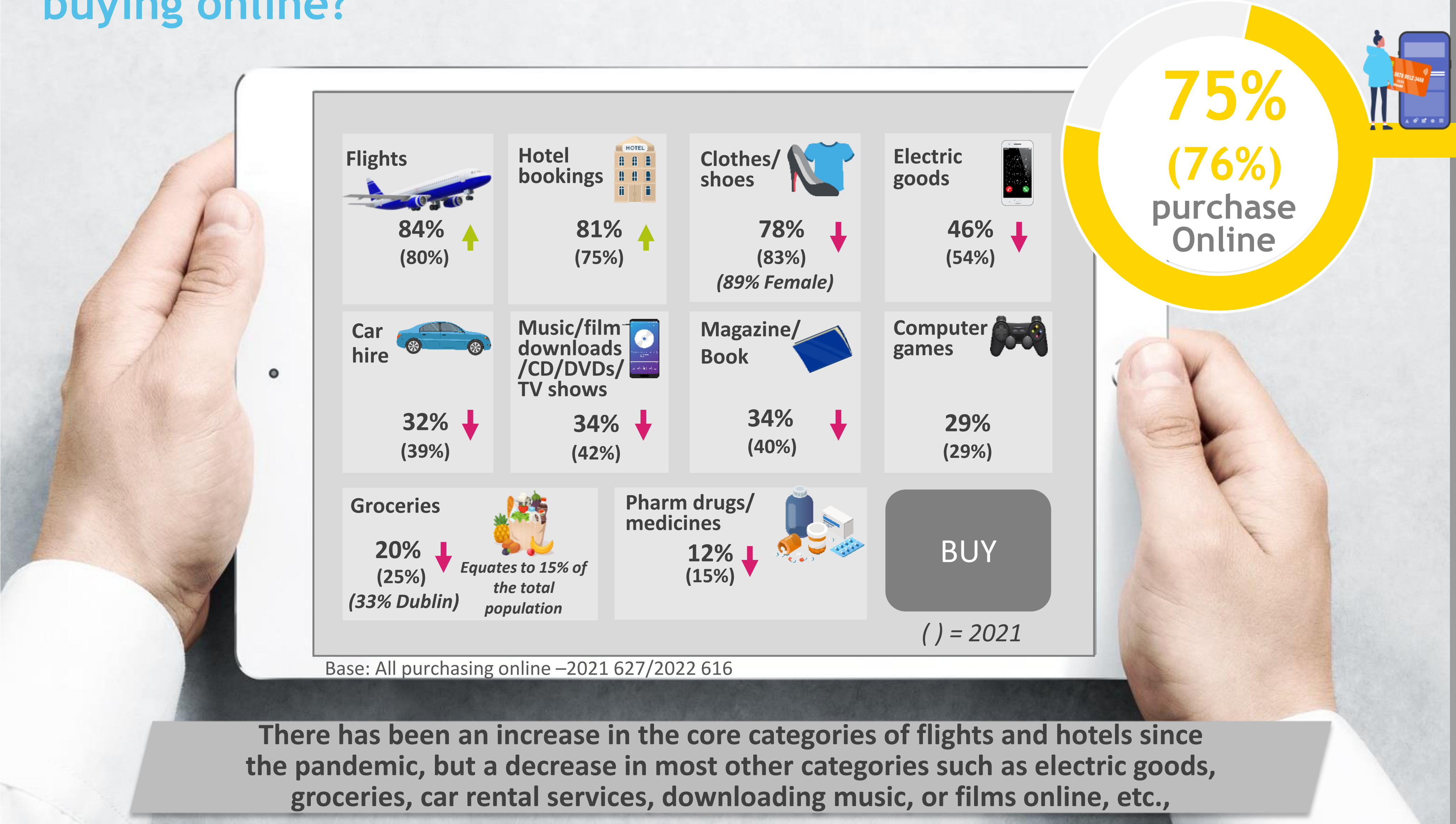
3 in 4 (75%)

of the population purchase online*

The under 50s continue to be the main online purchasers

Base: all Adults 16+ - 1,003

In 2022, online purchasing remains stable, but what are we buying online?



Flights
84% ↑
(80%)

Hotel bookings
81% ↑
(75%)

Clothes/ shoes
78% ↓
(83%)
(89% Female)

Electric goods
46% ↓
(54%)

Car hire
32% ↓
(39%)

Music/film downloads /CD/DVDs/ TV shows
34% ↓
(42%)

Magazine/ Book
34% ↓
(40%)

Computer games
29%
(29%)

Groceries
20% ↓
(25%)
(33% Dublin)
Equates to 15% of the total population

Pharm drugs/ medicines
12% ↓
(15%)

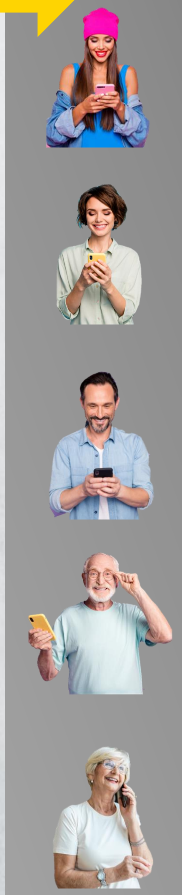
BUY

( ) = 2021

Base: All purchasing online –2021 627/2022 616

75%
(76%)
purchase Online

Online purchases Generations



Gen Z 79%
(84%)

Millennials 78%
(82%)

Gen X 73%
(71%)

Baby Boomers 41%
(39%)

Silent Gen 10%
(15%)

There has been an increase in the core categories of flights and hotels since the pandemic, but a decrease in most other categories such as electric goods, groceries, car rental services, downloading music, or films online, etc.,

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 2021)

(Higher amongst middle-class Dubliners)

The under 50s continue to be the main online purchasers

Base: all Adults 16+ - 1,003

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

More likely to buy; Groceries than blue-collar.

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

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

What we are buying online x Generation

Base: all Adults 1,003

🟥 Significantly lower
🟩 Significantly higher

	Total	Generation				
		Gen Z	Millennials	Gen X	Baby Boomers	Silent Gen
UNWTD	*1003*	*93*	*328*	*204*	*294*	*84*
	%	%	%	%	%	%
Flights	62	52	78 🟩	79 🟩	45 🟥	22 🟥
Hotel Bookings	59	45 🟥	77 🟩	74 🟩	42 🟥	21 🟥
Clothes / shoes	57	80 🟩	78 🟩	61	32 🟥	10 🟥
Electric goods (including mobile phones)	33	38	50 🟩	36	15 🟥	3 🟥
Music/film downloads/CD/DVDs/TV shows	25	35 🟩	35 🟩	29	9 🟥	5 🟥
Books/Magazines	25	35	32 🟩	32	13 🟥	6 🟥
Car Hire Bookings	24	10 🟥	33 🟩	36 🟩	13 🟥	10 🟥
Computer Games	21	44 🟩	31 🟩	23	3 🟥	1 🟥
Groceries	15	8 🟥	22 🟩	21	7 🟥	3 🟥
Pharmaceutical drugs/medicines	9	7	15 🟩	11	4 🟥	1 🟥

GenZ is more likely to buy clothes/shoes, computer games, and download music/films, while Millennials are more likely to buy flights, hotel bookings, clothes/shoes, and electric goods (including mobile phones).

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

While an increase in researching products in-store and checking in location, following brands on social media, and sharing posts online remained stable.

Base: All adults 16+ - 1,003

	Follow brands on social media (i.e. on Facebook, Twitter, etc)	**Research** products on your mobile phone when in a store	**Check** in your location when on social media	**Share** posts, videos, photos etc. online
Total	39% *(38%)*	48% *(43%)*	31% *(24%)*	43% *(44%)*
Gen Z 	79 *(81%)*	77 *(79%)*	57 *(54%)*	78 *(75%)*
Millennials 	57 *(57%)*	67 *(62%)*	42 *(47%)*	59 *(61%)*
Gen X 	35 *(30%)*	48 *(40%)*	32 *(20%)*	39 *(39%)*
Baby Boomers 	15 *(14%)*	24 *(16%)*	12 *(7%)*	22 *(24%)*
Silent Gen 	2 *(4%)*	9 *(9%)*	2 *(3%)*	6 *(7%)*

Both more likely to be ABC1 (related to more tech holding and their type of work and communities)

○ = Significantly higher vs 2021

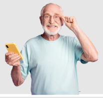
() 2021

** All those who are working*

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

Practical day-to-day use is increasing: Interact with devices via the app and use food delivery apps

Base: All adults 16+ - 1,003

		Connect your tablet, laptop or mobile phone to your TV to play programmes, videos or music		**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.		Use food **apps**, such as Deliveroo or Just eat, for **home delivery**		Use **Google maps** to check your location or get directions	
Total		37%	(37%)	○ 19%	(16%)	35%	(34%)	62%	(63%)
Gen Z		58	(69%)	○ 29	(19%)	58	(60%)	75	(85%)
Millennials		51	(54%)	27	(25%)	○ 51	(47%)	79	(82%)
Gen X		○ 40	(36%)	19	(20%)	35	(33%)	○ 73	(68%)
Baby Boomers		○ 18	(12%)	7	(5%)	14	(17%)	41	(41%)
Silent Gen		4	(2%)	5	(2%)	4	(9%)	15	(16%)

○ = Significantly higher vs 2021

() 2021

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

Top tech summary 2022

In conclusion

Every year, B&A's TechScape report tracks technology usage and attitudes in Ireland. The major growth this year is in the areas of entertainment and finance.

In terms of the actual number of smart devices in the home, we continue to buy more with the average number growing this year to 8 on average in the home. While Smartphones, tablets and laptops have plateaued, we see an increase in Smart TVs and Smart Hubs. Netflix still dominates paid online streaming, but we are seeing growth in additional services (people are not dropping Netflix) such as; Amazon Prime, Disney+, Apple TV, as people expand their repertoires. YouTube is a clear player for younger cohorts.

Our communication is being dominated by messaging apps such as WhatsApp with personal email usage also growing. It is an ever-changing 'Social' world, with TikTok now bigger than Twitter and Instagram growing, while Facebook is losing is luster. People are trying to Switch off: The number of people who check their emails, texts, or social media first thing in the morning has decreased. 21% use apps to help meditate/ relax/ disconnect from the world. However, more of us are checking social media/emails when having difficulty sleeping. It seems that many are trying to cut down, but are being pulled back in.

With the Irish banking sector in a state of flux it is interesting to see the rapid growth in the use of digital financial operators such as Revolut, N26, and Monzo. Not surprisingly, the under 50s- and middle-class sectors are driving their growth. How comfortable people are in having larger interactions with these digital organization will be the key to any fundamental change in the banking system (e.g. larger sums such as salaries, taking mortgages, etc).

For about half the population broadband is more important than TV, especially for GenZ and Millennials. Broadband has clearly tipped into being a basic utility for a significant part of the population. A clear divide continues to exist with blue collar (C2DE) and rural populations having a lower affinity with BB. Access issues will play a role here. This is important as about 1 in 5 continue to work from home 2+ days a week, and the latter is more of a 25-49, middle class and Dublin trend, albeit rural is registering highly here too now.

As our digital reliance expands, it is important that Government and organisations realise that one third of those aged 65 or older are not online at all. As a nation we have a duty of care to this generation. It is likely they are finding the digitialisation of finance and telecommunications extremely difficult, if not impossible.

In conclusion

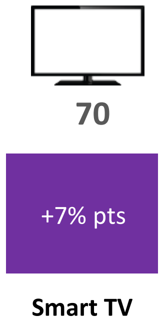
3 in 4 (75%) of the population purchase online, similar to last year. The under 50 year old population continues to be the main drivers of online purchasing. There has been an increase in the core categories of flights and hotels since the pandemic, but a decrease since last year in most other categories such as electric goods, groceries, car rental services, downloading music, or films online, etc. GenZ is more likely to buy clothes/shoes, computer games, and download music/films, while Millennials are more likely to buy flights, hotel bookings, clothes/shoes, and electric goods (including mobile phones).

2 in 5 have now ever 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)). 6% have dabbled in cryptocurrency.

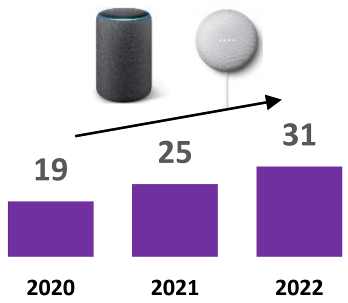
With such immersion in technology, it is not surprising that about 3 in 5 are concerned nowadays regarding how their data is used by organisations.

Top tech summary

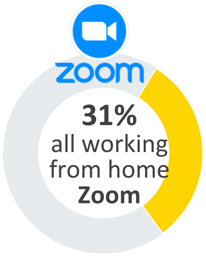
Ownership of smart TVs continue to grow



Ownership of smart hubs also on the increase



Zoom is the main video communications platforms used; particularly amongst those working from home



Families with pre teenagers have an average of 10-11 SMART* (the average home has 8)

– Those from a middle class background, Dubliners and Family Pre Teen lifestage have access to the highest number of potential on-the-go devices.

An increase in YOY **daily internet usage** as **84%** of all adults access the internet once a day or more often – but **33% of the over 65s are never online** (internet usage is growing amongst this cohort however)

33% of Irish consumers now use digital financial operators e.g. Revolut, N26, Monzo (+10%pts vs 2021) – driven by the middle class & Dubliners

2022 sees continued growth in the use of TV streaming platforms

NETFLIX	prime	Disney+	RTÉ PLAYER
73% (+4% pts)	38% (+5% pts)	29% (+5% pts)	43% (+9% pts)

TikTok now more popular than Twitter. 72% of GenZ are on TikTok. Tik Tok continues its upward trajectory ↑ 11 percentage points from 16% in May 20 to 27% in May 2022.

WhatsApp and Facebook remain the most popular social media and OTT services used in 2022

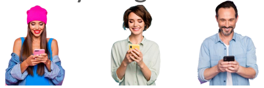
(Amongst the **16-24** age group **WhatsApp, Tinder, and Twitch** experienced the most significant increase in YOY).

Online purchasing

3 in 4 (75%) of the population purchase online. The under 50s population continues to be the main online purchasers.

(GenZ is more likely to buy clothes/shoes, computer games, and download music/films, while Millennials are more likely to buy flights, hotel bookings, clothes/shoes, and electric goods (including mobile phones).

For about half the population broadband is more important than TV, especially for **GenZ** and **Millennials**. YouTube is a player for younger cohorts.



43% claim that they are getting tired of Facebook. Significantly higher amongst Millennials.

People are trying to Switch off: The number of people who check their emails, texts, or social media first thing in the morning has decreased. 21% use apps to help them meditate/ relax/ disconnect from the world.

However, more of us are checking social media/emails when having difficulty sleeping.

Thank you.

B&A RESEARCH & INSIGHT

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

Delve Deeper