An Coimisiún um
Rialáil Cumarsáide
Commission for
Communications Regulation

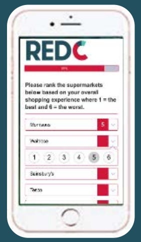
ComReg Technology Survey

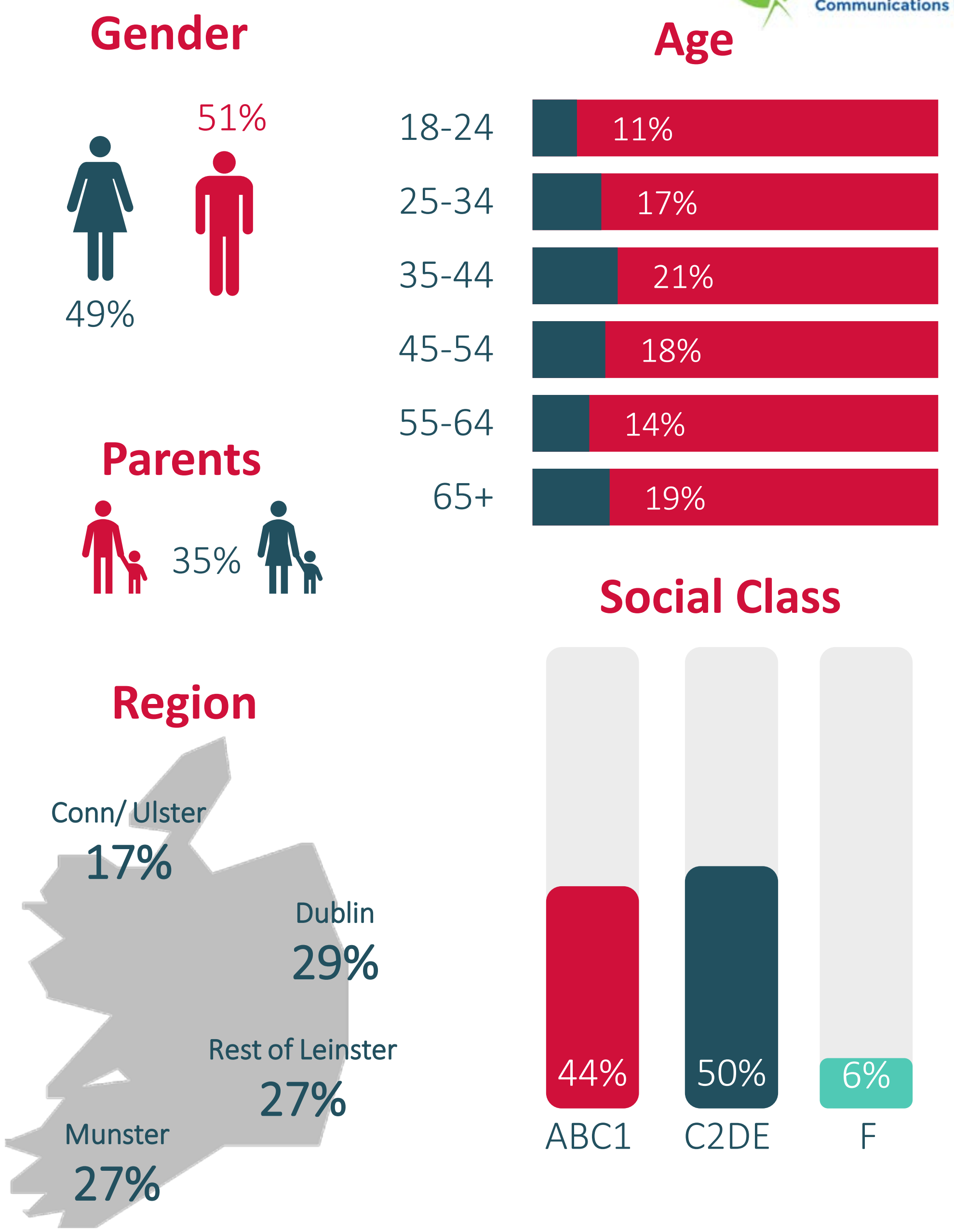
March 2021

Prepared by Red C Research
on behalf of ComReg

Methodology

- In December 2020 ComReg commissioned Red C to undertake a survey of adults and parents aged 18+ to help understand peoples behaviours around online services, safety online and online harms
- 2,008 survey participants were recruited using RED C's online panel of over 40,000 members
- Quota controls were used to ensure a nationally representative sample of ROI adults and parents aged 18+
- Data was weighted to ensure a nationally representative sample based on latest CSO projections
- Fieldwork for this research took place from 4th – 13th December 2020



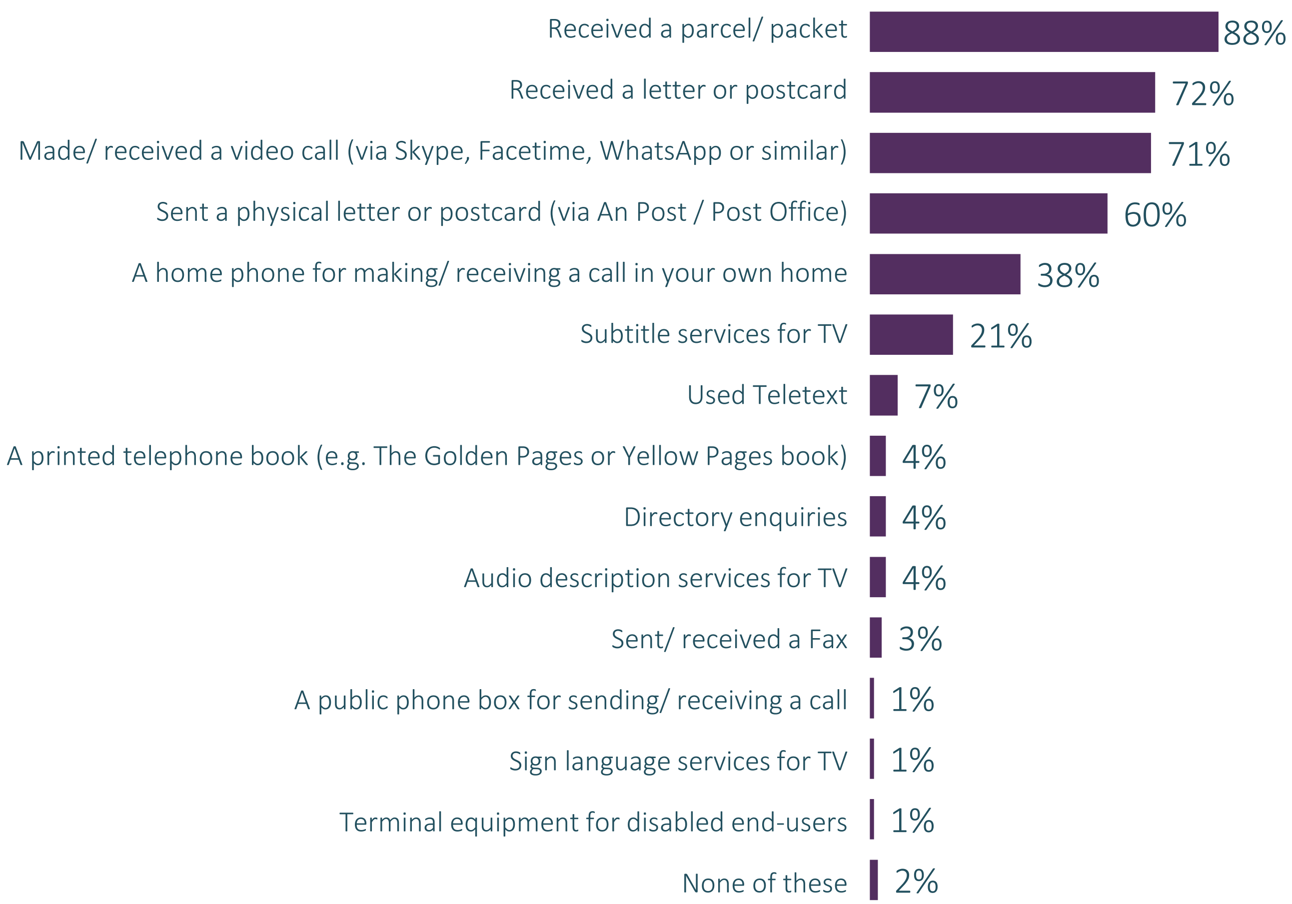


1

Current Use of Services & Technology

Which, if any, of the following have you personally used in the past six months?

Similar proportions have taken part in a video call as have received a letter or postcard in the past six months.



Age			Internet Usage		
18-34 (n=494)	35-54 (n=900)	55+ (n=614)	High* (n=906)	Medium** (n=726)	Low*** (n=376)
82%	89%	91%	88%	90%	84%
66%	68%	82%	73%	72%	72%
73%	72%	70%	77%	75%	51%
51%	57%	71%	63%	58%	57%
21%	32%	57%	31%	40%	48%
24%	20%	20%	26%	18%	14%
6%	6%	10%	5%	7%	11%
4%	2%	8%	3%	4%	9%
3%	4%	5%	5%	4%	3%
6%	3%	3%	5%	3%	2%
4%	2%	3%	4%	2%	2%
3%	1%	-	2%	*	*
1%	1%	*	1%	*	1%
1%	1%	-	1%	-	*
4%	2%	1%	1%	2%	3%

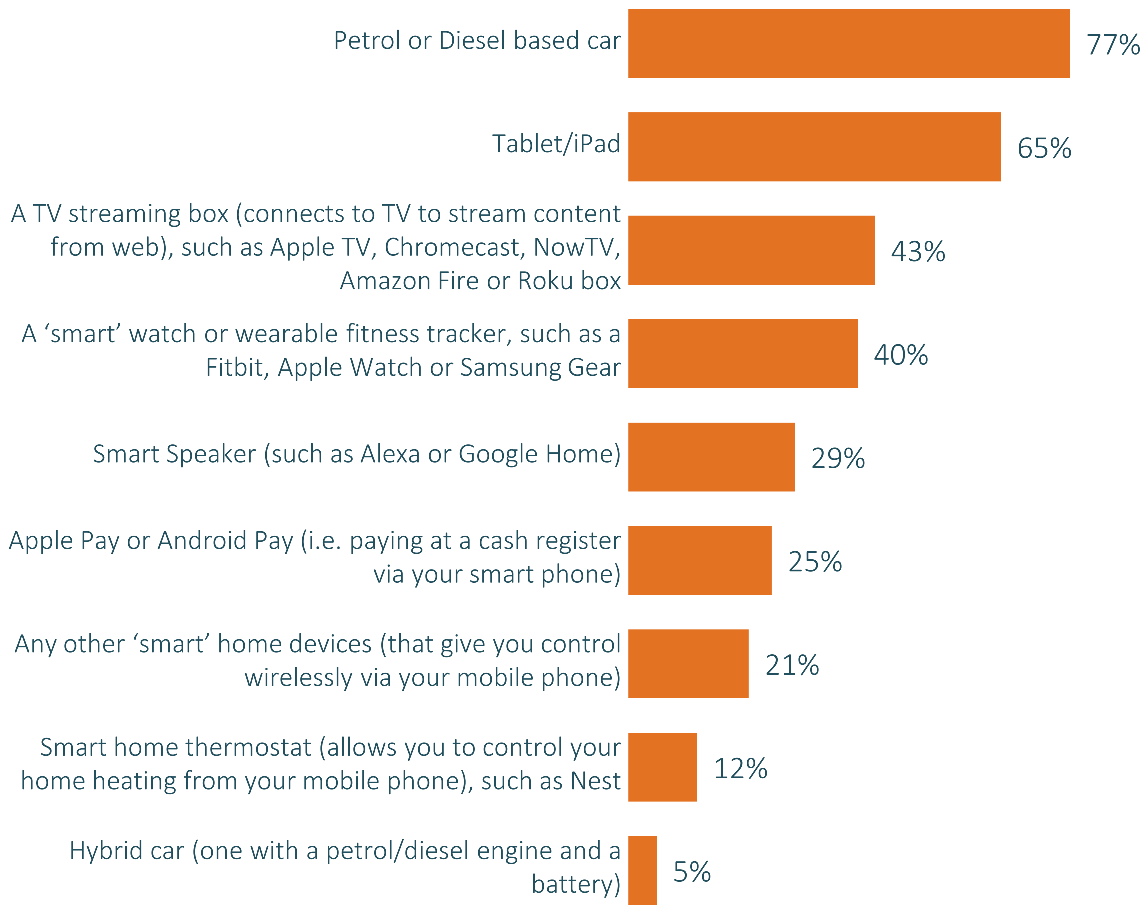
*High Internet usage = Use at least 6 online services on at least a daily basis
**Medium internet usage = Use less than 6 online services on a daily basis but at least 6 services on a weekly basis
***Low internet usage = Use less than 6 online services on a weekly basis

(Base: All Respondents; n=2,008)

Do you/others in your household use any of the following?

Age and level of internet usage is directly linked to ownership of technology.

Majority own a petrol/diesel car and a tablet/iPad



	Age			Region				Internet Usage		
	18-34 (n=494)	35-54 (n=900)	55+ (n=614)	Dublin (n=543)	Rest of Leinster (n=561)	Munster (n=545)	Ulster/ Connacht (n=359)	High (n=906)	Medium (n=726)	Low (n=376)
Petrol or Diesel based car	71%	79%	80%	69%	81%	80%	81%	77%	80%	74%
Tablet/iPad	61%	66%	66%	67%	68%	65%	58%	70%	65%	54%
A TV streaming box	49%	48%	32%	46%	42%	43%	40%	55%	41%	22%
A 'smart' watch or wearable fitness tracker	46%	43%	32%	44%	40%	39%	37%	50%	39%	21%
Smart Speaker	31%	32%	24%	29%	28%	29%	32%	38%	28%	13%
Apple Pay or Android Pay	40%	26%	14%	33%	24%	23%	18%	38%	20%	7%
Any other 'smart' home devices	27%	22%	16%	24%	20%	21%	18%	29%	17%	11%
Smart home thermostat	10%	14%	12%	18%	14%	8%	8%	17%	11%	5%
Hybrid car	5%	5%	7%	8%	5%	5%	3%	7%	4%	4%

(Base: All respondents; n=2,008)

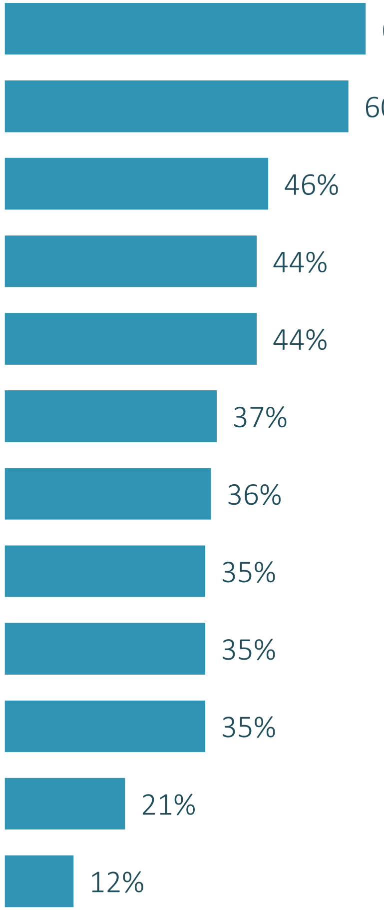
2

Future use of Technology

Do you see yourself/others in your household owning or using any of the following in five years' time?

Most people expect to own a Smart TV and a Tablet in 5 years time

Those with low current internet usage less likely to see themselves owning most tech items in 5 years time.



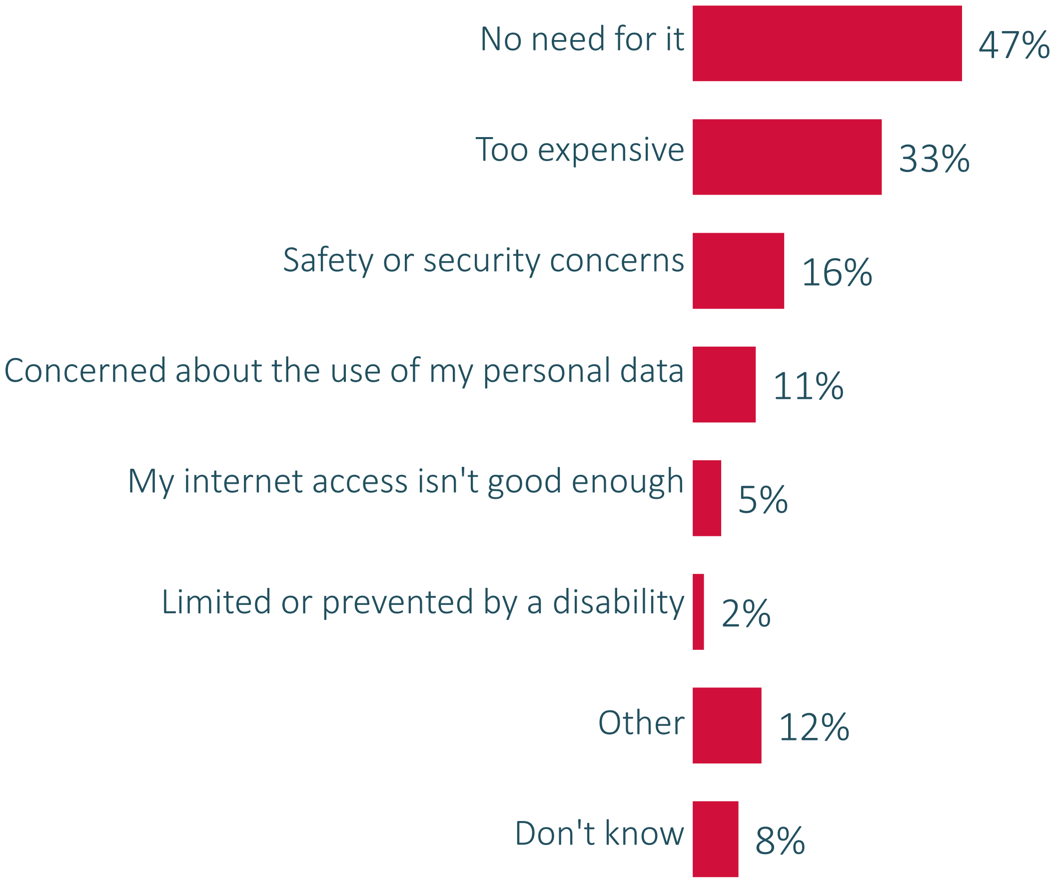
	Total	Age: 18-34 (n=494)	Age: 35-54 (n=900)	Age: 55+ (n=614)	Region: Dublin (n=543)	Region: Rest of Leinster (n=561)	Region: Munster (n=545)	Region: Ulster/ Connacht (n=359)	Internet Usage: High (n=906)	Internet Usage: Medium (n=726)	Internet Usage: Low (n=376)
A ‘smart’ TV (i.e. one that is connected to the internet directly)	63%	59%	65%	63%	62%	66%	64%	58%	66%	66%	51%
A tablet/ iPad	60%	50%	62%	64%	56%	62%	63%	57%	60%	64%	50%
Petrol or diesel based car	46%	42%	48%	48%	35%	48%	52%	51%	43%	50%	45%
A ‘smart’ watch or wearable fitness tracker, such as a Fitbit, Apple Watch or Samsung Gear	44%	49%	45%	40%	45%	46%	41%	44%	52%	43%	29%
A TV streaming box (connects to TV to stream content from web), such as Apple TV, Chromecast, NowTV, Amazon Fire or Roku box	44%	48%	47%	37%	45%	42%	43%	47%	53%	44%	26%
Smart Speaker (e.g. Alexa or Google home)	37%	37%	41%	32%	40%	36%	35%	39%	44%	37%	22%
Hybrid car (one with a petrol/diesel engine and a battery)	36%	35%	36%	37%	40%	36%	35%	31%	41%	34%	29%
Smart home thermostat (allows you to control your home heating from your mobile phone), such as Nest	35%	32%	35%	38%	43%	34%	31%	31%	40%	37%	22%
Any other ‘smart’ home devices (that give you control wirelessly via your mobile phone), such as smart light bulbs (e.g. Philips Hue)	35%	38%	36%	31%	41%	33%	35%	29%	41%	35%	22%
Apple Pay or Android Pay (i.e. paying at a cash register via your smart phone)	35%	40%	36%	30%	41%	34%	32%	31%	46%	32%	16%
A solely electric car (i.e. one powered by electricity stored in battery, but without a petrol/diesel engine)	21%	25%	21%	19%	24%	22%	19%	21%	29%	16%	13%
Semi-autonomous car (e.g. a car that uses intelligent software and hardware to park a car or drive by itself)	12%	18%	12%	8%	12%	14%	12%	12%	18%	10%	4%

(Base: All respondents; n=2,008)

Why do you not see yourself or your household owning or using ... in five years' time? - I

Lack of need main reason for not owning/using Devices in five years

Apple/Android Pay and Smart Speaker both have a higher level of security/personal data concerns



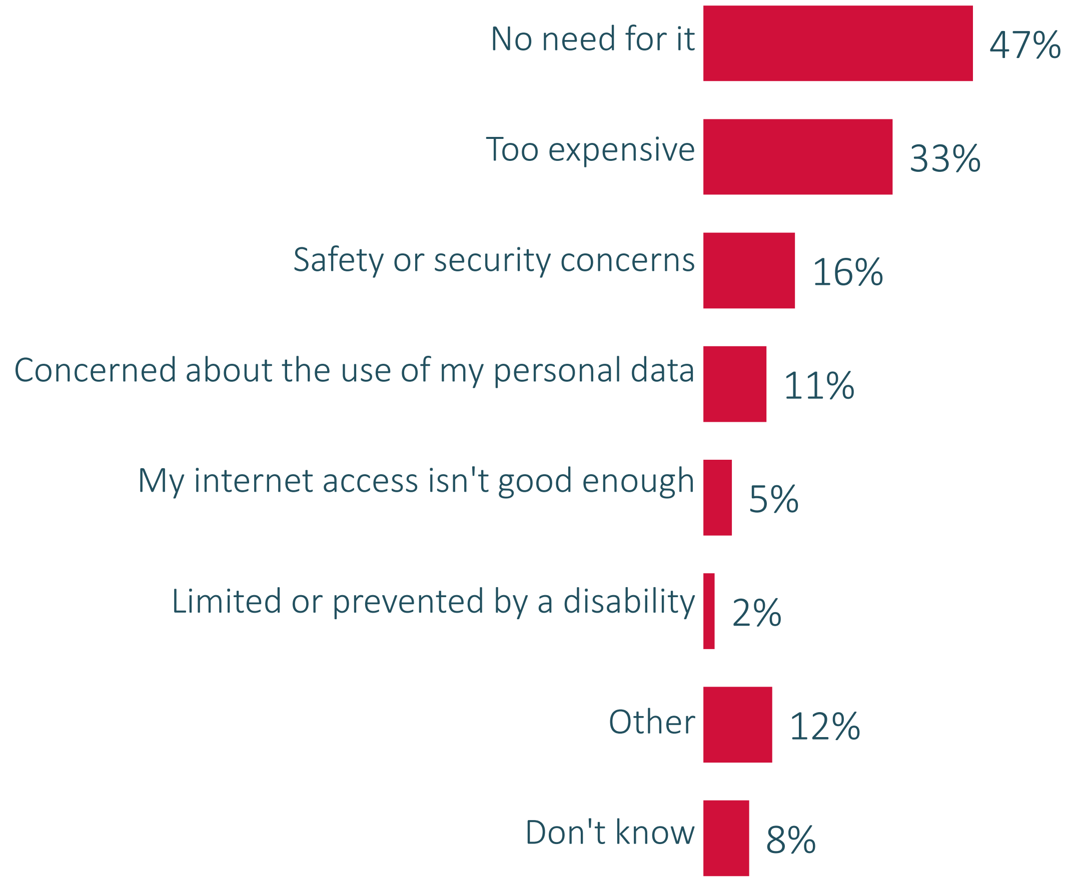
A tablet/ iPad	A 'smart' TV	A TV streaming box	Apple Pay or Android Pay	'Smart' watch or wearable fitness tracker	Smart Speaker
67%	49%	62%	44%	65%	66%
16%	27%	28%	13%	20%	11%
3%	10%	9%	40%	6%	27%
3%	14%	7%	27%	8%	30%
1%	9%	14%	8%	3%	6%
1%	4%	1%	-	3%	1%
13%	3%	7%	8%	5%	4%
8%	15%	6%	8%	9%	5%

(Base: All respondents with any device/ service not planning to use)

Why do you not see yourself or your household owning or using ... in five years' time? - II

Lack of need main reason for not owning/using smart home Devices in five years

Majority of those who don't see themselves owning a non petrol/diesel car is because of an expectation that they will be too expensive.



Smart home thermostat	Any other 'smart' home devices	Petrol or diesel based car	Hybrid car (one with a petrol/ diesel engine and a battery)	Solely electric car	Semi-autonomous car
61%	52%	26%	23%	12%	34%
27%	43%	30%	57%	67%	61%
10%	28%	4%	7%	9%	37%
9%	22%	-	-	-	8%
8%	11%	-	-	-	-
*	2%	3%	2%	1%	4%
8%	3%	46%	16%	20%	7%
7%	7%	5%	8%	7%	3%

(Base: All respondents with any device/ service not planning to use)

Key Findings

1

Use of services and technologies continues to evolve. Similar proportions have taken part in a video call as have received a letter or postcard in the past six months. Use of several traditional services such as directory enquiries or printed telephone books are very low, while adoption of connected devices such as smart speakers and smart watches are becoming commonplace.

2

Younger and more intensive (‘high’) internet users are using more connected devices than older and low intensity users. Differences are particularly notable among smartphone payments, smart watch/wearables and other smart home devices.

3

Consumers expect continued growth in the adoption of smart devices, with expectations highest among more intensive internet users. Nearly half of consumers expect to have a smart watch/wearable, while more than 1 in 3 expect to use smartphone payments or other smart home devices (e.g., smart light bulbs) in 5 years time. The majority expect to have a Smart TV and tablet/iPad.