



Connected Ireland Report

23rd October 2017

Three. Make it count.



The Three Connected Ireland Report

with Amárach Research

The first smartphone was launched in 2000 and there is hardly an aspect of our lives as consumers, workers and citizens that has not been impacted as a result. As Ireland's leading mobile data network, Three Ireland is at the forefront of Ireland's digital evolution and we recognise that it's how our customers use our network every day to stay connected that really matters.

The Three Connected Ireland Report looks at the connected lives of Irish people and how mobile technology is continuing to change how we interact with each other, with businesses and with government. The report also identifies what direction the Irish public wants mobile services to go in the future across our personal lives, ecommerce and public services.

The findings in this report are based on a representative survey of 1,000 smartphone users throughout the Republic of Ireland, conducted by Amárach Research. We asked them questions around three themes: The Connected Life, The Connected Business and The Connected Citizen.

The Connected Life

The Connected Life looks at how respondents communicate and connect with others and the impact of smartphones on our personal lives. There is universal appetite for using mobile phones to enhance connectivity across all age groups in Ireland, and there is strong evidence that smartphones are helping Irish people to feel safe, connected, happy and in control.

The Connected Business

The Connected Business studies how respondents shop online, engage with brands and the innovations respondents want to see. There is scope for Irish businesses to further exploit the opportunity that mobile e-commerce presents. Central to this is consumers' expectation that they receive the same level of customer service whether they are shopping on mobile or in store.

The Connected Citizen

The Connected Citizen examines how respondents currently engage with, or would like to interact with, public services. Irish citizens look to Government to innovate the delivery of public services through mobile technologies, with considerate openness to services like e-voting. The security of citizen data is a core consideration.

Three. Make it count.



The Connected Life

The first stage of mobile phone technology involved making the connections possible and providing the infrastructure so that new ways of communicating could be created, developed and enhanced. In the era of data and smartphone saturation, we are bringing connectivity to the next level, making it more about the different ways in which these connections can be used to enhance our lives. This becomes apparent when we look at how the different demographics are using technology to connect.

How we connect

While the majority of respondents (59%) still have a landline at home, having a broadband connection is even more popular (89%). While all age groups enjoy a high level of broadband connectivity, younger generations are leading the way towards 'cutting the cord' with the fixed landline - only 45% of 25 – 34 year olds have a landline, compared to 74% for those aged 55+.

When it comes to initiating contact with someone, virtually no one who has a smartphone uses the landline anymore. 3% will call from a landline compared with 37% calling from a mobile or 32% sending an instant message. Men are more likely to call from mobile at 44% compared to women at 31%, while women prefer instant messaging, 38% with males coming in at 24%.

Table 1.0 *If you want to get in contact with someone, are you more likely to:*

	Overall	16 – 24	25 – 34	35 – 44	45 – 54	55+
Call from mobile	37%	8%	30%	39%	44%	51%
Instant message (WhatsApp etc.)	32%	70%	45%	28%	18%	16%
SMS	20%	11%	11%	20%	31%	23%
Call from home phone	3%	1%	3%	1%	3%	6%
Other	8%	10%	11%	12%	4%	4%

Table 2.0 *If you want to get in contact with someone, are you more likely to:*

	Male	Female
Call from mobile	44%	31%
Instant message (WhatsApp etc.)	24%	38%
SMS	21%	19%
Call from home phone	4%	3%
Other	7%	9%



Smartphone app usage

When it comes to which apps Irish people are engaging with most frequently on their smartphone and how this relates to social media, the report confirms the popularity of social messaging over social networking for younger generations. 53% of people say that instant messaging apps are their most used app - this ranks consistently across the board. The research highlights how different generations have a preference for various apps.

Table 3.0 Which are the three most frequently used apps or functions on your smartphone?*

	Overall	16 - 24	25 - 34	35 - 44	45 - 54	55+
Facebook	40%	44%	57%	43%	37%	29%
Snapchat	13%	54%	16%	6%	4%	1%
Instagram	8%	32%	13%	4%	3%	1%
YouTube	13%	26%	14%	20%	7%	6%
Instant messaging	53%	60%	68%	58%	44%	45%

*Results may add up to more than 100% due to multiple selections by respondents

Living online

The survey also reveals the extent to which the generations, especially younger people, “live online”. One in three of 16 – 24 year olds say it would frustrate them if they couldn’t share an amazing experience with their followers, compared to just over one tenth of respondents aged 55+.

Seven out of ten 16 – 24 year olds say they get upset if they know someone has seen their message but hasn’t responded, compared to 22% of 55+.

How much money would we want to make it worth giving up our smartphone?

We asked those surveyed how much they would want for giving up their smartphone for one month. More than half of respondents (53%) would ask for more than €50 per month, with almost one third (29%) looking for over €100. A fifth of 16 – 24 year olds would want over €500, compared to less than a tenth or 7% of 55+ who would want the same amount for the loss of their smartphone.



Table 4.0 *If your mobile phone was taken away from you, and you were prevented from using another one, how much would you need to receive in euro per month?*

	Overall	16 - 24	25 - 34	35 - 44	45 - 54	55+
€1 - €50	36%	33%	35%	35%	36%	39%
€51 - €100	17%	16%	19%	20%	17%	14%
€101 - >€500	29%	42%	31%	26%	29%	22%
None / Don't know	18%	9%	15%	16%	18%	25%

Psychology of smartphone users

The psychology of smartphone users is generally positive – over half say their smartphone makes them feel connected (59%), safe (52%) and in control (50%), and nearly half feel happy (49%), confident (49%) and content (48%) as a result of using their smartphone.

However, the majority of respondents also agreed that their smartphone hinders going to sleep (54%), compared to 16% who believed their smartphone helped them sleep.

81% of 16 – 24 year olds and 80% of 25 – 34 year olds say they would use their mobile to try to check out a person they didn't know online before going on a date. 43% of respondents aged 55+ would do the same, demonstrating how the public uses their smartphone as a tool to enhance their personal safety.

While older people are less likely to use their smartphone to look someone up before a date, the table below emphasises how older people, in particular, feel safer as a result of their smartphone.

Table 5.0 *Q7 Do you agree or disagree with the following statements? People these days are much safer thanks to mobile phones:*

	Overall	16 - 24	25 - 34	35 - 44	45 - 54	55+
Agree	57%	44%	51%	51%	53%	71%
Neutral	30%	36%	33%	34%	35%	20%
Disagree	13%	20%	16%	15%	12%	9%

How smartphone usage is changing:

Many smartphone users may be unaware of the degree to which their creative potential has already been enhanced by mobile technologies, services and apps. For example, under half of respondents (45%) have used their mobile to try out a new recipe; over a third (35%) to learn a new skill.

3 in 10 of smartphone owners have used their mobile to create and upload original content: that adds up to a million or more Irish people already experimenting with the power of digital and mobile technologies to invent,



create and even to innovate in their personal and family lives and in their communities. Mobile technologies are unleashing a wave of user generated content and innovation by Irish people as they progress from the first wave of connectivity to the next wave of creativity.

Key takeaway

The research shows there is a significant potential to foster and unleash creativity and connectivity to all age groups across Ireland through smartphones.



The Connected Business

Mobile shopping

The Three Connected Ireland Report emphasises the significant extent to which Irish people are shopping on their smartphones and just how much they are spending on their smartphone when they shop.

Over three in four (76%) use their smartphone to shop online once a month, with one in every two respondents shopping 2 to 4 times a month. Women are more likely to shop online, but there is a small divide between the two sexes' mobile shopping habits.

Table 6.0 How often do you purchase goods or services online with your mobile phone?

	Overall	16-24	25-34	35-44	45-54	55+
2 - 4 times a month	50%	47%	55%	54%	52%	34%
Once a month	26%	28%	25%	24%	22%	29%
2 - 3 times a year or less	24%	24%	20%	21%	23%	37%
Don't Know	0%	1%	0%	1%	3%	0%

Table 6.1 How often do you purchase goods or services online with your mobile phone?

	Females	Male
2 - 4 times a month	51%	47%
Once a month	26%	25%
2 - 3 times a year or less	21%	26%
Don't Know	2%	2%

When it comes to the amount spent online, more than one in every five of 25 - 34 year olds (22%) spend €100 - €500 a month shopping on their smartphone.

Table 6.2 Approximately how much do you spend online buying goods and services in a typical month with your mobile phone?

€	Overall	16-24	25-34	35-44	45-54	55+
1 - 50	54%	68%	47%	56%	50%	57%
51 - 100	23%	17%	21%	25%	26%	28%
101 - >500	15%	10%	22%	18%	19%	10%
None / Don't Know	8%	5%	10%	1%	5%	5%



Customer service on mobile

There is a growing emphasis on customer experience as a key driver of customer loyalty and repeat business. Most smartphone users have interacted with one or more businesses and services via their mobile phone.

The experience has been a generally positive one for most people, especially when it comes to interactions with mobile networks providers, banks and supermarkets, though insurers fare less well.

Table 7.0 How would you rate each of the following in terms of your experience of interacting with them via your mobile?

% who would rate their mobile interactions highly	
Mobile provider	56%
Main bank	50%
Supermarket	47%
Pharmacy	46%
Main airline	46%
Electricity provider	42%
Car insurer	38%
Health insurer	32%

38% of smartphone users have interacted with customer service agents while shopping online via their phone, and 89% found the experience helpful.

Table 7.1 Of all respondents that communicated with customer service agents by using text or video chat, what percentage found it helpful?

	Overall	16-24	25-34	35-44	45-54	55+
Helpful	89%	83%	87%	90%	93%	93%
Not helpful	9%	17%	10%	8%	7%	7%
Don't Know	2%	0%	3%	2%	0%	0%

Significant minorities of customers in some categories have used their mobile to give feedback or make a complaint to a service provider – ranging from 47% of mobile network customers to 31% of bank customers to 19% of airline customers.

Mobile customer experience will become an important, maybe the most important, driver of customer satisfaction, loyalty and Net Promoter Score as the size of the mobile economy grows; challenging all service providers to respond more effectively to mobilised customer bases.



How the digital environment is transforming business opportunities

With only 42% of respondents saying they purchase from Irish websites versus foreign websites, there is a significant opportunity for Irish businesses to further exploit the ecommerce business through potential customers' smartphones.

We also looked at how the connectivity between mobile phones and other devices in the home and elsewhere is driving change. The report shows respondents would clearly value these services, some of which exist but are not yet widely available, such as home security systems being connected to smartphones.

For example, 6 in 10 smartphone users say they would welcome a service that connected their home security system to the internet, controlled by their smartphone. Smartphone users aged 55 and over (66%) value this as a service the most.

There is a substantial demand for these innovations in our everyday lives, from fridge alerts and making minor payments to controlling heating as the below table shows.

Table 8.0 To what extent do you or would you value each of the following features of mobile phones?

	Overall	16-24	25-34	35-44	45-54	55+
Heating being controlled by your smartphone	43%	35%	43%	48%	41%	45%
Monitor electricity from your smartphone	55%	49%	55%	62%	50%	57%
Security system being connected to the internet and controlled by your smartphone	61%	54%	64%	60%	57%	66%
Make minor payments using your smartphone	49%	53%	50%	45%	46%	49%
Fridge alerting your smartphone to its contents	36%	41%	40%	38%	34%	31%

**Results may add up to more than 100% due to multiple selections by respondents*

The key takeaway

There is an opportunity for Irish businesses to improve their customer service through their mobile engagement platforms. The research also shows a demand for services which enhance the respondents' security and safety.



The Connected Citizen

How citizenship is changing

Irish citizens look to Government and public services to lead the way when it comes to mobile innovation. For public service providers and Government to do this successfully, they need to ensure the benefits are delivered and costs of accessing public services through smartphones are limited.

The Three Connected Ireland Report shows that respondents in all age groups and regions feel that Government could make better use of mobile channels for engagement (calls vs. website etc.) with citizens.

When it comes to data protection, most people want to know what the trade-off is when sharing data with services providers: they will willingly share personal information provided there is a clear benefit.

Data protection concerns

There is an equal level of concern when it comes to public and private organisations holding an individual's personal data. Ensuring the safety and security of personal data is identified as a key concern with respondents and should be a focus for both sectors as they look to implement mobile services.

Table 9.0 To what extent are you concerned about the safety of your personal information held by private companies?

	Overall	16-24	25-34	35-44	45-54	55+
Concerned about private companies	61%	42%	58%	69%	62%	65%
Not concerned about private companies	15%	25%	16%	9%	13%	15%
Neutral / Don't Know	24%	33%	26%	22%	25%	20%

Table 9.1 To what extent are you concerned about the safety of your personal information held by public organisations?

	Overall	16-24	25-34	35-44	45-54	55+
Concerned about public services	57%	43%	60%	56%	64%	59%
Not concerned about public services	16%	25%	12%	14%	14%	16%
Neutral / Don't Know	27%	32%	28%	30%	22%	25%



The public services respondents would like to see

Given Ireland's controversial history with e-voting, it is interesting to note that smartphone users are more likely to favour voting with smartphones.

Table 10.0: How likely is it that you would use your mobile phone for each of the following if the option was available?

	Overall Would	Overall Would Not	Neutral / Don't Know	Dublin	Leinster	Munster	Connacht & Ulster
To vote for local councillors in local elections	44%	35%	21%	48%	44%	41%	45%
To vote in a general election	44%	37%	19%	45%	49%	41%	42%

**Results may add up to more than 100% due to multiple selections by respondents*

Rural connectivity and safety

When we look at the public services respondents would like to see implemented via smartphones, there is strong demand across Ireland, particularly in Connacht and Ulster, for the introduction of services which allow respondents to use their smartphone to monitor security and feel safer. The examples below highlight that respondents want to use smartphones to enhance how they act as active citizens.



Table 11.0: How likely is it that you would use your mobile phone for each of the following if the option was available?

	Overall would	Overall Would Not	Neutral / Don't Know	Dublin	Leinster	Munster	Connacht & Ulster
Send photo of suspicious people/cars in your area to the local Gardaí	55%	23%	22%	54%	55%	52%	62%
Send photo of illegal dumping to local authorities to alert them to the problem	61%	18%	21%	60%	57%	62%	68%
Answer a local government survey about what local citizens want	56%	18%	26%	59%	53%	54%	60%
Send photo of potholes and other road/footpath problems to local authorities	58%	19%	23%	57%	58%	59%	60%

**Results may add up to more than 100% due to multiple selections by respondents*

How respondents are engaging with public services

When looking at how respondents are engaging with public services, the preference for online and mobile interaction is evident, where the options exist. Only interaction with Gardaí and the Department of Social Protection show higher levels of traditional engagement.



Table 12.0 What departments or authorities have you dealt with in the past 12 months, and how did you interact?

	Digital methods (website, app)	Traditional methods (post, face-to-face, landline)	Did not interact
Property tax	37%	25%	38%
Income tax	43%	35%	22%
Water tax	26%	19%	55%
Revenue Online System (ROS)	59%	25%	16%
Car tax	60%	22%	18%
Gardaí	12%	36%	52%
Department of Social Protection	19%	48%	33%
Passport Office	18%	28%	54%

Key takeaway

Irish citizens are looking to public services and Government to provide innovations and advancement in the delivery of public services through mobile technologies, across all areas from e-voting and surveys to community security.



Where now?

The Three Connected Ireland Report has presented a multi-faceted picture of smartphone usage in Ireland and its future potential. We will monitor the evolution of Ireland's economy and society as mobile technologies and services drive transformation in our lives as consumers, workers and citizens.

Clearly it is early days. While the creative use of smartphones is – as we've seen – already well established, when it comes to online shopping, there is significant potential for growth.

It is earlier still when it comes to digital governance in Ireland but we have seen that there is huge appetite among Irish citizens for mobile public services. We will measure the evolution of these and other trends in future reports in this series as Irish businesses and public authorities seize the mobile opportunities that lie ahead.