



**Global Mobile Consumer
Survey – The Irish Cut**

A land of saints, scholars
and smartphones

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Foreword

The smartphone is ten years old and year in and year out it has increasingly become an integral part of users' lives.

Maybe it's the Irish propensity to talk and connect but we are among the top users of smart phones in Europe with 90% penetration (UK: 85% and a European average of 88%). We are also the most likely to upgrade our phones in the next year with 44% of us intending to buy a new phone in the next year. Most pertinent of all, on average we admit to checking our smart phones 57 times a day versus the European average of 41 times.

We are the land of saints, scholars and smartphones.

Over the ten years, we have seen the phone morph from being a voice enabler to our camera to a social messaging app and now to a personal assistant and our link to our bank.

So where to next.

- The technological capabilities of phones has remained relatively flat for the past number of years. Changes in technology now and in the coming years will revolve around power consumption while improving processing speeds. We expect to see advancements in the software on our phones with increased use of AI and machine learning.
- The IoT revolution is also beginning and we expect to see the phone playing an instrumental role as a hub for our IoT experience as it morphs into health monitoring via wearables and as it becomes our television remote control and an access point to our heating systems (our phone is solving that very Irish question of – “Did you turn the immersion off?”) and other household appliances.
- As the fintech era begins to find its feet, we know mobile phones will have an integral role as our payment enabler – whether it replaces the credit card or will be complimentary is to be determined. Who our bankers will be is equally up in the air.
- Compared to the consumer side, we expect to see the use of mobile devices by enterprise software providers increase. Already, people are using instant messaging apps and cameras for work but we expect to see more specific work apps being developed such as apps to link into ERP or CRM systems and not just e-mail. Cloud enabled software means that data can be easily transmitted to and from our mobile devices meaning enterprise software no longer needs larger PCs and laptops.

It would not be right to comment on mobile devices without considering the societal impact. Our survey has shown that device usage will become more intense but people are becoming more self-aware of their usage and how it may be detrimental to their personal relationships. We cannot underestimate how mobile devices have changed how we interact with others and the right balance is still to be found for many as our survey shows.

We hope you find this report useful and that you will find the analysis insightful. I would like to appreciate the efforts of Rory O'Connor and Yurie Hata who were involved in pulling the data into meaningful nuggets of information and who provided me with first-hand experience of how millennials actually use their mobile devices.



Richard Howard

Head of Technology, Media and Telecommunications Industry Group
Deloitte Ireland


The changing face of the Irish consumer

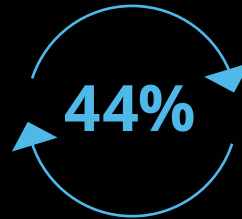


2%
of Irish mobile users will look to buy the **latest device** when it's out



55%
of consumers still **buy their phone** in store

56% 
of respondents said they would change their phone on the basis of **poor battery life**




of consumers will look to **upgrade their mobile phone** within the next 12 months against a **European average of 38%**

SAMSUNG

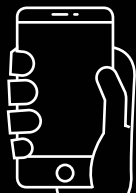


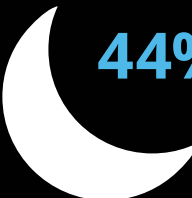
The top brand of phones across respondents with **32%** of the market each

84%
of consumers said they would be happy to **recommend** their existing phone to a friend 

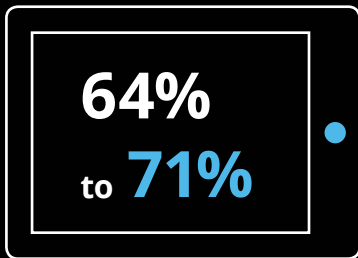


80%
of consumers are largely **happy with their choice of network**

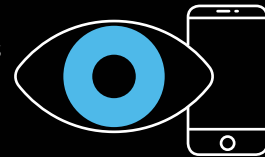
90%
of Irish adults have a **smart phone** 

44%  of people check their phone during the **night**

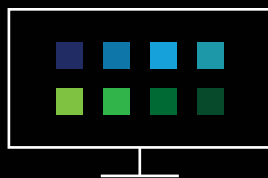
The number of people with access to a tablet has increased from



Irish adults look at their mobile phone **57** times a day versus a **European** average of **41** times



16% of Irish people admit to looking at their phone more than **100 times a day** against a **European** average of **8%**



45% of consumers now have a **smart television**

45% of respondents use their phone for **banking purposes**



8% of consumers said they would change their phone because a **newer version** had been released



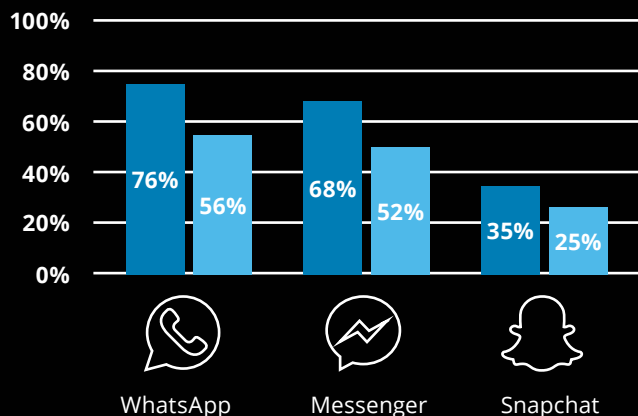
check their e-mail on their smart phones



of users have used **biometrics** to access their phones or approve mobile transactions

Social messaging on mobile devices is continuing to grow as a means of communicating

2017
2016



Snapshot of the Irish mobile consumer

The mobile millennial Diarmuid, 21

Law student
Dublin
Works part-time
Lives at home

Buyer Behaviour	2017	2016
Early adopters	2%	6%
Early considerers	38%	49%
Trend followers	28%	19%
Necessity buyers	31%	26%

Ownership	2017	2016
Smartphone	94%	90%
Laptop	91%	86%
Small tablet	42%	40%
Large tablet	52%	27%
Smart TV	40%	52%



Diarmuid is a 21 year old law student in Dublin. Within 5 minutes of waking he will have checked his email and social media and will consistently check social media and messaging apps on the way to college. The last thing he will do before going to sleep is check his phone. Over the past year though he has increasingly started to use voice calls to communicate with family and friends albeit it is still not as popular as his instant messaging apps which is his primary means of communication. His smart phone usage (both data and voice calls) has increased and is facilitated by a competitive unlimited minutes and unlimited data tariff. Since last year, Diarmuid has become increasingly aware that he uses his phone too much but has done little to reduce his usage. He uses his tablet to download and read his class notes during lectures, while he uses his laptop to write reports. He owns a games console and continues to play with his mates on line, but he plays less so than last year. He is willing to buy the latest smartphone if there is anything he likes however, he hasn't changed his smartphone for the last two years, partially because of cost and partially because there is no real change in specifications to make him want to change.

The plugged-in professional Dee, 29

Marketing Manager
Cork
Co-habits

Buyer Behaviour	2017	2016
Early adopters	1%	5%
Early considerers	38%	42%
Trend followers	31%	28%
Necessity buyers	30%	25%

Ownership	2017	2016
Smartphone	92%	92%
Laptop	91%	89%
Small tablet	42%	37%
Large tablet	40%	44%
Smart TV	42%	48%



Dee is a married 29 year old woman who works full-time as a marketing manager for a technology company in Cork. Dee checks her smartphone within 15 minutes after waking up in the morning to see if there are any emails or messages for her. If she has time before work, she goes for a run wearing her fitness band. This is connected to her smartphone and she monitors the number of steps that she runs and calories burned with it to improve her health and set herself goals for the future. At the office, Dee is constantly connected to her laptop as she needs it for her work throughout the day. While she utilises a tablet for work, most of her work day is spent on her laptop with the tablet used for meetings and checking mail when away from her desk. After work, she enjoys browsing shopping websites/apps and makes purchases using online payments. She has increasingly become more accustomed to buying clothes online, knowing she can return the purchase if it doesn't suit her. When she goes shopping she will use her phone to both compare prices and to make in-store payments with her contactless payment app, an app she is increasingly becoming more confident with. In the evening, she will often spend some time watching her favourite movie on her smart TV while browsing the web on her tablet. She intends on installing wireless speakers in the near future. Dee sometimes feels her partner uses his mobile phone too much and increasingly they are having open conversations on their mobile at the expense of human interaction. She tries to limit her mobile usage by keeping her phone in her bag and turning off notifications.

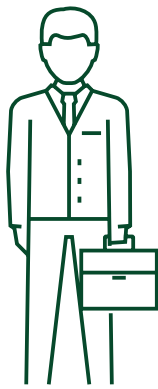
The digital dad

Daniel, 45

Financial services
Dublin
Family home

Buyer Behaviour	2017	2016
Early adopters	2%	3%
Early considerers	29%	33%
Trend followers	32%	30%
Necessity buyers	37%	30%

Ownership	2017	2016
Smartphone	91%	86%
Laptop	85%	77%
Small tablet	43%	37%
Large tablet	46%	42%
Smart TV	48%	41%



Daniel is 45 years old, lives with his family outside of Dublin and works in the Financial Services sector in the city. Before breakfast, he checks his work mails and reads news on his tablet. His phone is on a monthly post pay contract as his family use the same carrier at home for Wi-Fi as he can get good value for money. He primarily uses his laptop at work in his office, however, he makes some calls to clients using his mobile, and carries a tablet to show some documents to clients instead of printing them. He doesn't check his smartphone during the night as he wants to enjoy his time with his daughter and son instead of being online for the whole day. His family watches documentaries or movies together on their smart TV after dinner. Recently he has considered installing a smart thermostat and a smart lighting systems to save money.

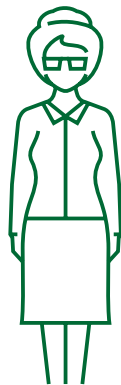
The silver surfer

Daphne, 65

Retired nurse
Sligo
Married

Buyer Behaviour	2017	2016
Early adopters	1%	2%
Early considerers	19%	22%
Trend followers	37%	41%
Necessity buyers	43%	36%

Ownership	2017	2016
Smartphone	83%	77%
Laptop	77%	77%
Small tablet	41%	29%
Large tablet	34%	29%
Smart TV	41%	29%



Daphne is a 65 years old grandmother who has recently retired from her career as a nurse. She enjoys painting and often uses her large tablet to download photos as a sample image for her pictures. She uses Wi-Fi at home, but connects to 4G with her smartphone when she goes out and has been increasingly using her smart phone more often for both email and on social media. She often uses video calls to keep in touch with her son and grandchildren that live in the UK. She has another daughter who lives in Australia. Daphne and her two children sometimes use group calls to enjoy online family conversations filling one another in on the ongoing in their lives, however, they constantly struggle getting past the time-zone issues. Daphne has had the same smartphone for several years and will likely replace this and any other devices only when they're broken. Before going to bed, she uses her eReader to read her favourite novels almost every day. She is considering installing a home camera or monitoring system / alarm as her son recommended her to have it for security.

Trends

1. The device revolution becoming evolution

Not only does Ireland have one of the highest levels of smart phone usage across Europe at 90% but we are one of the leading countries when it comes to upgrading with 44% of us expecting to trade in our phones over the coming year, against a European average of 38%.

Despite the number of Irish people looking to upgrade in the next year, consumers are not as willing to spend on new devices as in previous years. The percentage of consumers in Ireland willing to buy the latest device has dropped from 38% to 31% with the number of people who will only replace their device if it is defective increasing from 30% to 36%. Despite this we are still one of the leading countries in Europe when it comes to a willingness to invest in new devices, especially when it comes to smartphones.

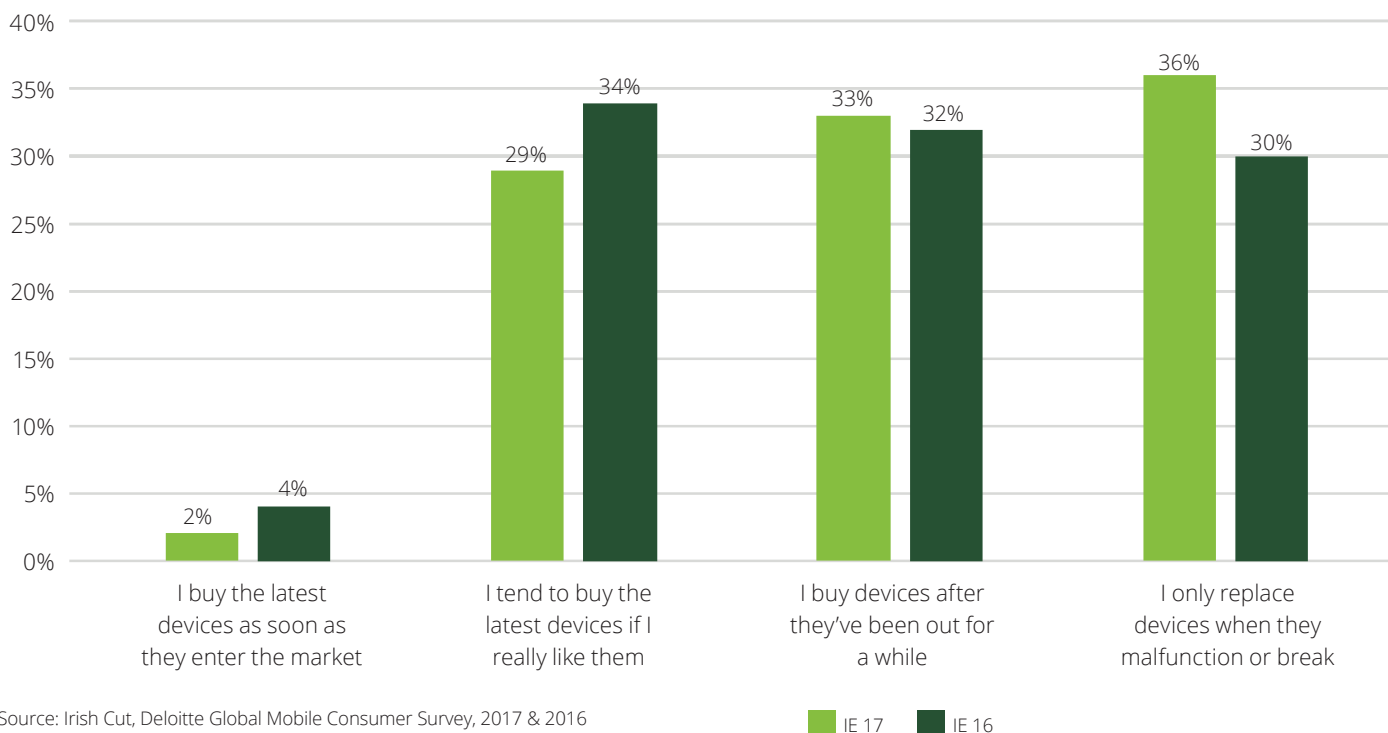
We are seeing the trend of reduced early adoption across all mobile devices, including newer technologies such as smart watches and VR headsets.

One of the only areas where we are seeing increased ownership levels in Ireland is Smart TVs with ownership in 2017 having increased to 44% of consumers from 29% in 2016. But just because the revolution is slowing does not mean it is stagnating. While 44% of consumers indicate that they intend to replace their mobile phone in the next 12 months, 19% are looking at purchasing a new laptop with a much smaller 12% indicating they hope to upgrade their tablet.

With a lack of any significant technological breakthroughs in the past year, consumers have slowed their rate of device update. Recent innovations such as biometrics and virtual reality gaming are not significant game changers to convince consumers to upgrade their devices.

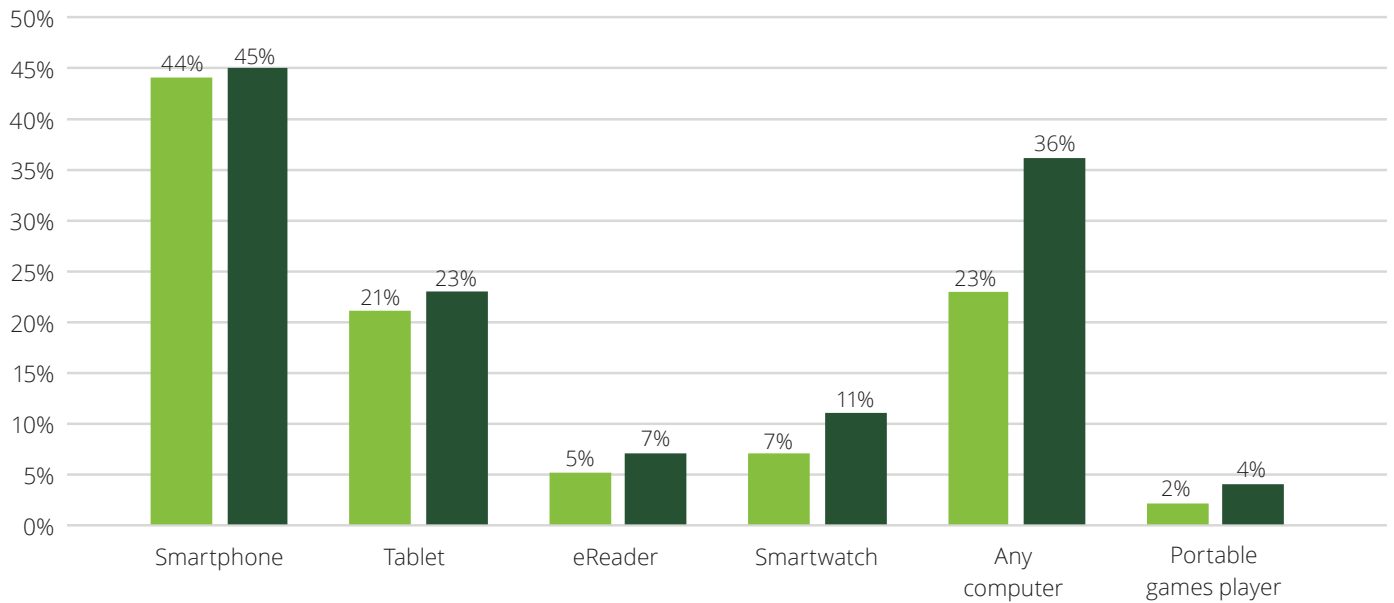
This trend is consistent with the decrease in global consumer technology spend over the past 3 years. Deloitte predict that the global spend on consumer hardware will continue to decrease over the coming 2 years, with spend expected to increase from 2020 onwards.

Attitudes towards new devices (%)



Source: Irish Cut, Deloitte Global Mobile Consumer Survey, 2017 & 2016
 Base: All adults 18-75, Ireland 2017: 1,036, Ireland 2016: 940

Foreseeable purchases in the next 12 months (%)



Source: Irish Cut, Deloitte Global Mobile Consumer Survey, 2017 & 2016
 Base: All adults 18-75, Ireland 2017: 1,036, Ireland 2016: 940

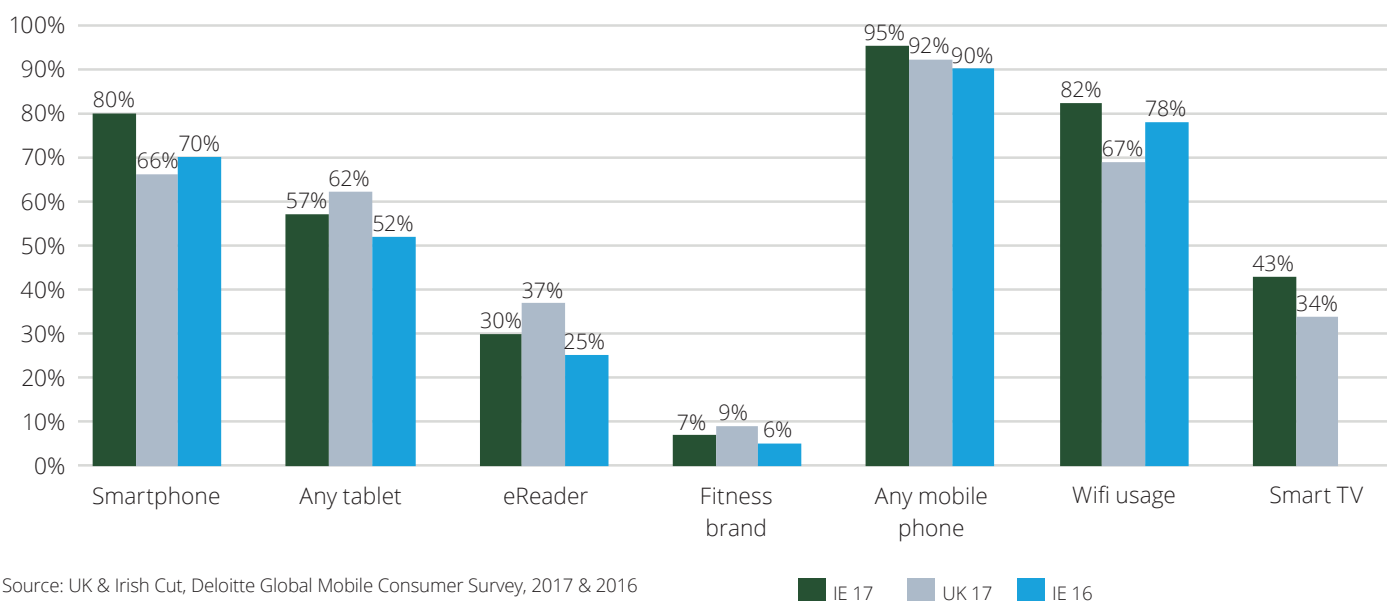
■ IE 17 ■ IE 16

So what do people use their smartphones for

	Daily	Weekly	Less often	Never
Voice calls	65%	24%	9%	2%
VOIP	16%	20%	29%	35%
Mobile operator calling app	6%	5%	19%	70%
Video calling	7%	17%	34%	42%
Group video calling	8%	9%	28%	55%
Text messaging	68%	22%	8%	2%
Instant messaging	64%	15%	7%	14%
Social networks	59%	10%	10%	21%
MMS	22%	15%	34%	29%
Email	63%	17%	10%	10%

2. The Grey Tech Market driving growth

Ownership of/Access to (%)



Source: UK & Irish Cut, Deloitte Global Mobile Consumer Survey, 2017 & 2016
 Base: All adults 65+, Ireland 2017:115, Ireland 2016: 112, UK 2017: 982

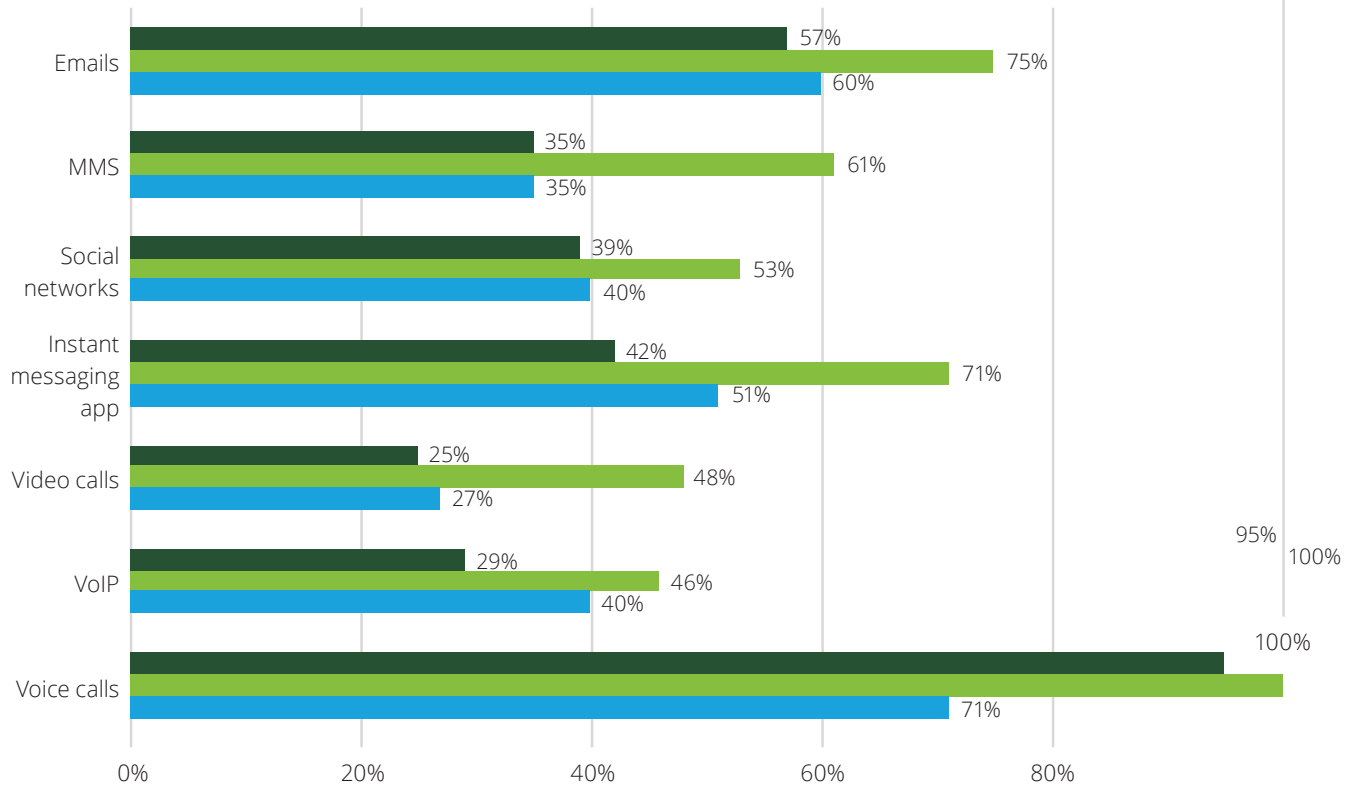
The initial growth in the use of mobile devices was amongst the 25 to 35 year old market in the period from 2005 to 2010. With decreasing costs, the market moved to the 18-25 market. With technological capacity and innovation stagnating, this younger market is holding on to devices for longer and not looking to upgrade as quickly. At the same time, the 65+ market are now starting to adopt mobile devices en-masse and the year on year movement between 2016 and 2017 points them out as a key market for mobile retailers. While consumer spend on hardware is stagnating, this is the one demographic where we are seeing accelerated buying patterns.

Average ownership of mobile devices by the 65+ market has increased from 48% in 2016 to 54% in 2017, with smart phone ownership now at 80%, 14% higher than ownership levels in the UK. Allied to this, the use of video calling has increased by 23%, driven by both increased broadband availability and increased smartphone ownership and broadband access has increased from 69% to 82%.

Given the leisure time available to the 65+ market, we would expect to see the level of video streaming increase dramatically in 2018 combined with a continued increase in tablet ownership. The adoption rate for using smart phone features when compared year on year and against our near neighbours in the UK, show our 65+ population to be a tech savvy group. We will be interested in seeing how companies will target this demographic over the coming 1 to 2 years given the growth in their digital spend.

...the 65+ market are now starting to adopt mobile devices en-masse and the year on year movement between 2016 and 2017 points them out as a key market for mobile retailers.

% of +65 years old who have used the following features



Source: UK & Irish Cut, Deloitte Global Mobile Consumer Survey, 2017 & 2016
 Note: All adults 65+, Ireland 2017:115, Ireland 2016: 112, UK 2017: 982

■ IE 16 ■ IE 17 ■ UK 17



3. Tablets as productivity tools

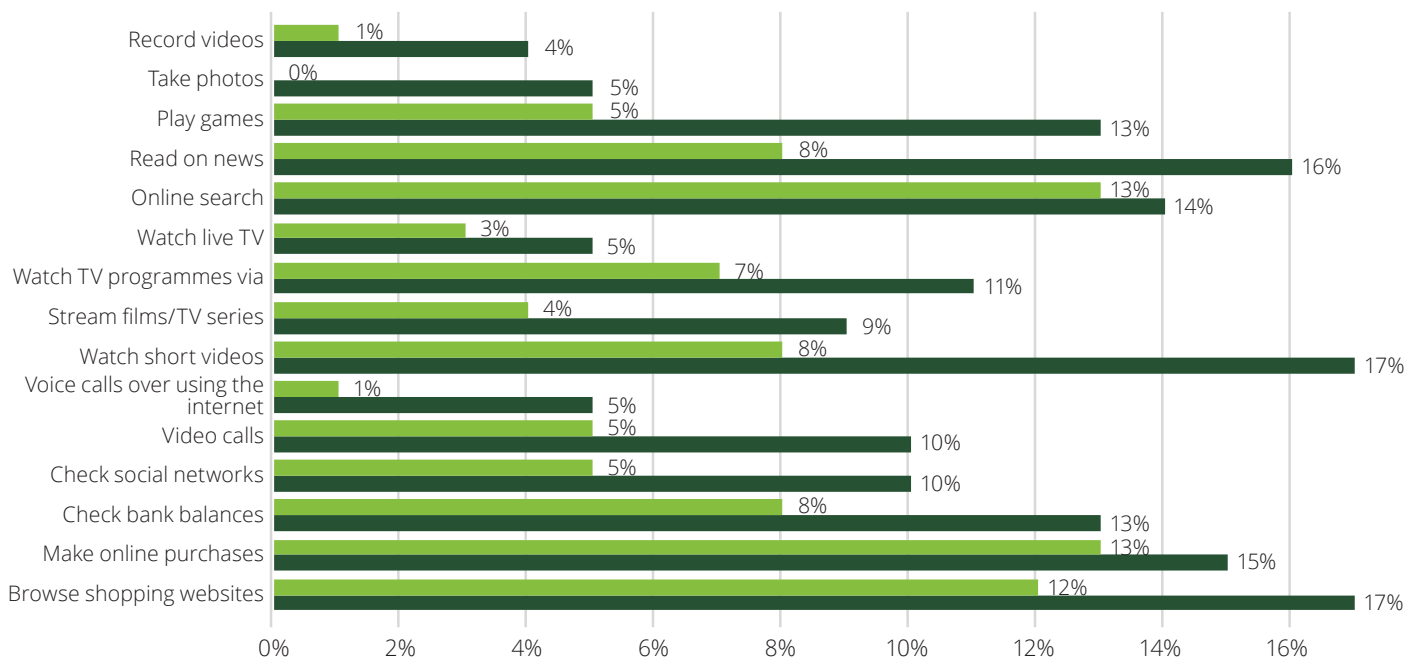
Ireland has seen an increase of 8% in ownership of tablets and 5% in laptops with a decrease of 3% in ownership of PCs. The highest level of tablet ownership is in the 18 to 24 year old bracket with tablet ownership increasing by 13%. The tablet is now showing itself to be the most pervasive mobile device after smartphones in Irish household. Our survey showing that 81% of people have access to a tablet while only 43% have access to a desktop.

As a productivity tool. We see the ability of tablets to thrive against PCs and laptops being down to the combining of two technology trends- cloud based storage and enterprises optimising their software for use on mobile devices. Cloud based storage means that applications are only pulling down relevant data as needed and mobile versions of existing software products are now available for tablets. You only need to look at ERP systems such as SAP who are looking at integrating mobility into their software platforms.

Despite its increased usage, security concerns still exist in consumer minds around the use of tablets. While corporate users are willing to invest in security software, consumers are less inclined to spend on data security and instead rely on software and operating system security measures. Security concerns have contributed to the PC still being used for online purchases.

Overall, with 21% of people intending to purchase or upgrade a tablet in the next 12 months compared to 7% expecting to purchase a desktop and 19% a laptop, the outlook suggests that the tablet will continue to strengthen its position.

Main uses of tablets and desktops



Source: Irish Cut, Deloitte Global Mobile Consumer Survey, 2017
 Base: All adults 18-75, Ireland 2017: 969

Desktop Tablet

4. Nomophobia – the Irish addiction continues

50% of Irish people think they use their mobile phone too much against a European average of 40%. While 50% of Irish people think this, 57% of Irish people believe that their partner use their mobile phone too much. So, while we admit that we have a problem, our partners believe it to be worse than we admit to!

To put all this in context, our addiction is more acute than our European counterparts. In response to questions on how often consumers use their smart phones, Irish consumers responded with an average of 57 times a day, against a European average of 41 times a day.

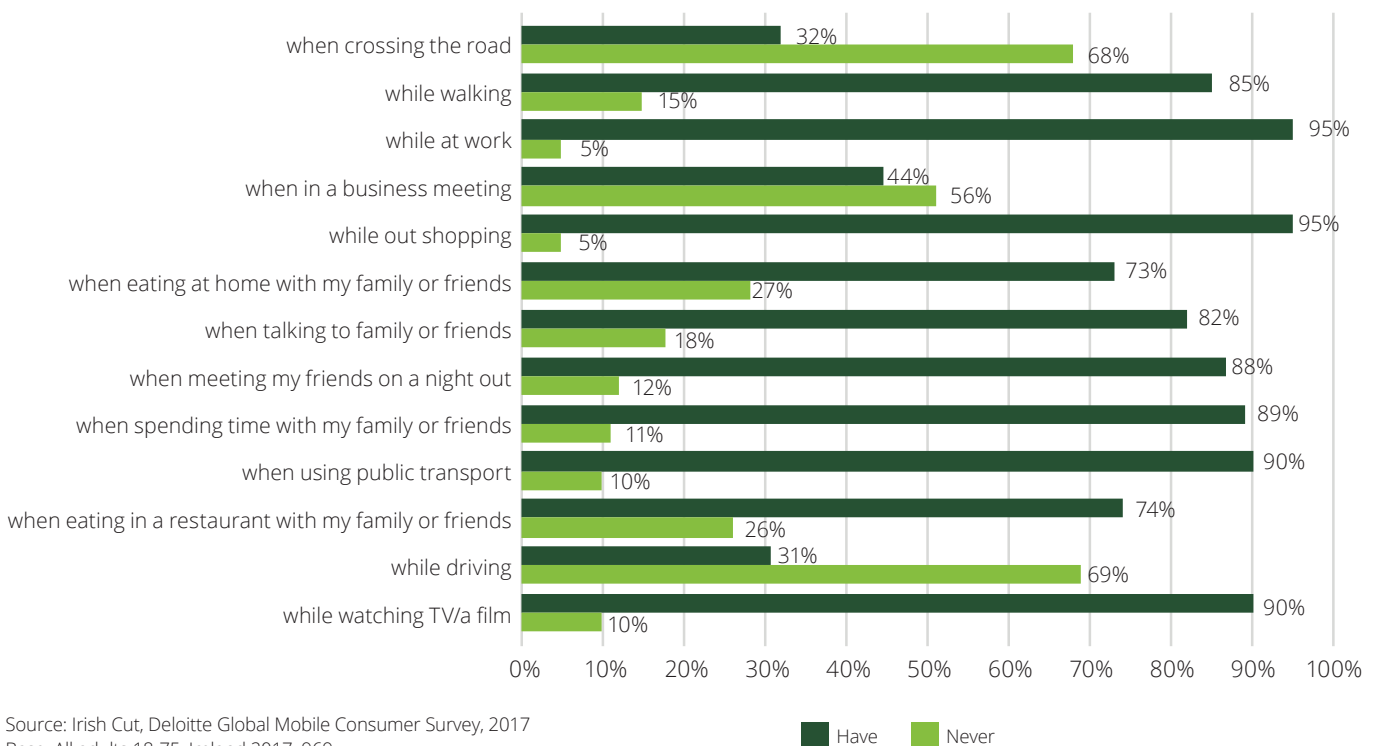
So how do we perceive our mobile usage?

- 16% - I definitely use it too much.
- 31% - I probably use it too much.
- 24% - I use it a lot but it is not too much
- 28% - I don't think I use it too much.
- 1% - I don't know.

And have we changed since last year? Afraid not. The only place where we have seen a decrease in usage is amongst males before going to bed, where mobile usage has decreased by 6%. And based on our research, it's hard to see where we are now not using our mobile phones. On the bright side, 45% of people try to use their mobile less, albeit, only 25% of them admit to being successful in curbing their mobile usage.

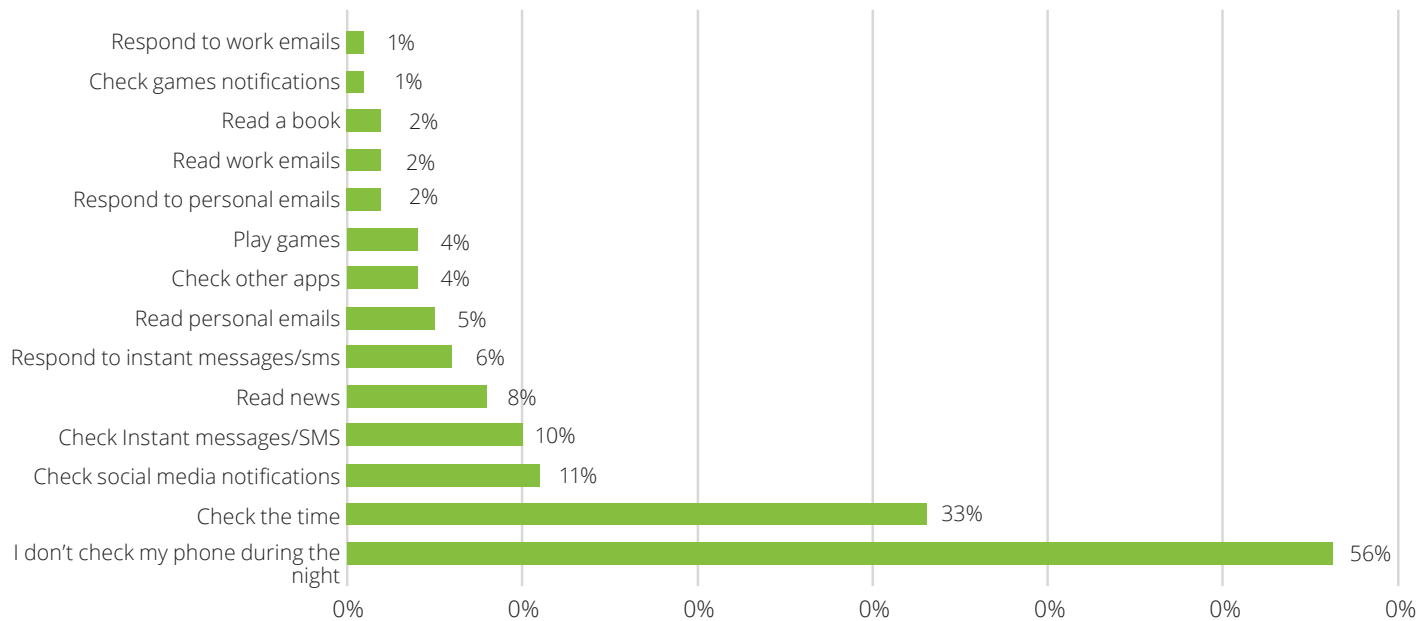
Mobile devices are a relatively new addition to our social fabric and they form an important part of our daily activities and interactions. Social norms will develop over time. Whether the fear of not being with one's mobile phone, nomophobia, starts to be more widely recognised as an ailment remains to be seen. Or maybe we will start to see pedestrian crossing lights embedded into footpaths, like in Australia, to stop users from walking out in front of traffic. We think the next five years will be very interesting in how social norms around the smart phone will develop. We also expect to see phone manufacturers put more usage controls into their devices such as the feature in Apple's iOS 11, which senses when a user is driving and restricts calls, messages and notification.

Where do you use your mobile phone?



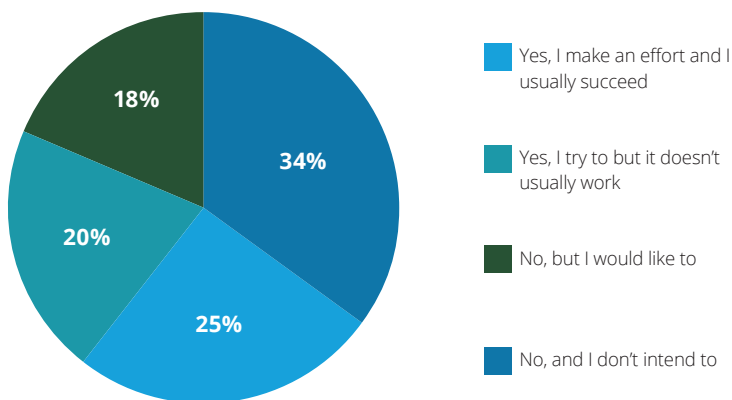
Source: Irish Cut, Deloitte Global Mobile Consumer Survey, 2017
 Base: All adults 18-75, Ireland 2017: 969

Phone usage in bed



Source: Irish Cut, Deloitte Global Mobile Consumer Survey, 2017
 Note: 969

Do you try to limit your mobile usage?



Source: Irish Cut, Deloitte Global Mobile Consumer Survey, 2017
 Base: All adults 18-75, Ireland 2017: 969

5. Online payments- willing but concerns remain

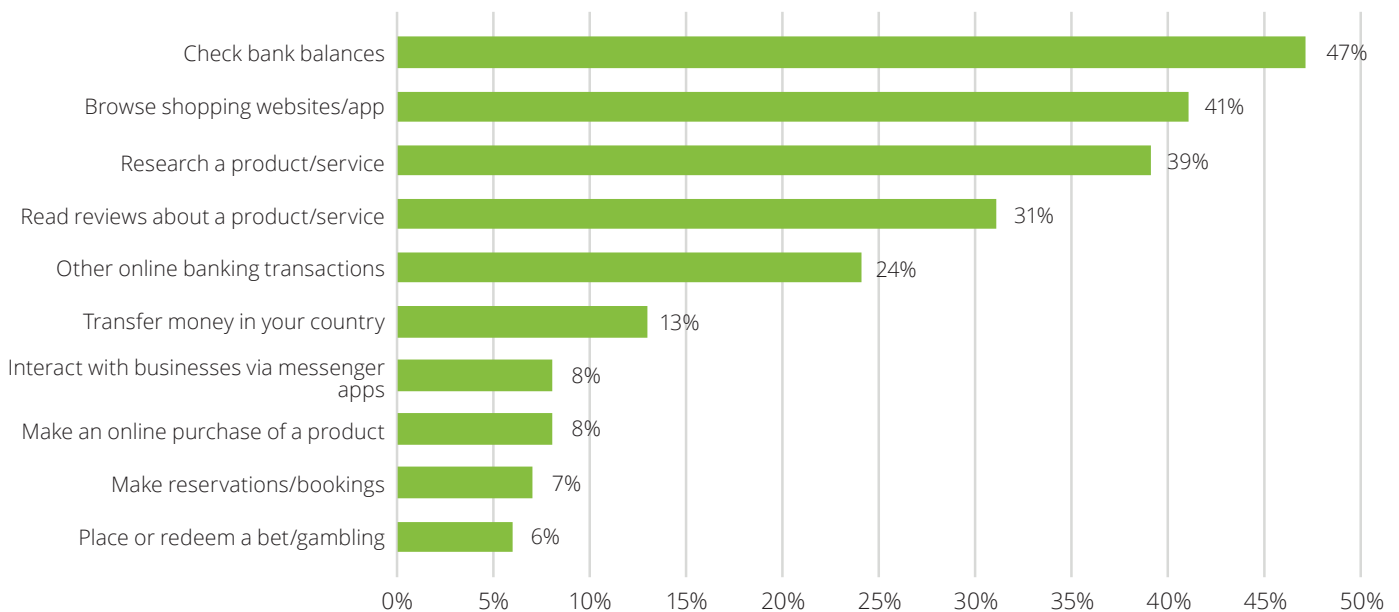
It is acknowledged by many that the future of banking and payment processing may lie with smart phones. While we are not yet confident as a society about using online mobile payments, we are trending in a positive direction. The number of Irish smartphone users who use in-store mobile payment solutions has increased by 7% to 19% since 2016. Although the percentage using mobile payments remains low, we expect to see similar year on year increases in usage.

We believe there are two factors contributing to the slow uptake in using mobile online payments. Firstly, there is an expense in banks and retailers developing secure systems and the Irish market, given its size, may not be the first market where solutions are developed. This is evidenced by the level of payment solutions used by UK consumers compared to Ireland. Secondly, while there is a willingness to use online payments, 26% of people still do not believe that mobile payment is secure. This figure has however decreased from 36% of respondents in 2016.

Amongst online payment solutions, PayPal is still the leading app with 23% of those who have used online payments, having used PayPal. The last 12 months however have seen the percentage of people using bank apps increase from 5% to 26%. Samsung Pay remains at 5%, while Android Pay has gone from 8% to 10%. However these numbers have to be seen in the context of them representing only the 19% of users who have used mobile payment solutions. What becomes the industry norm will be dictated by the decisions made by the remaining 81% of mobile users.

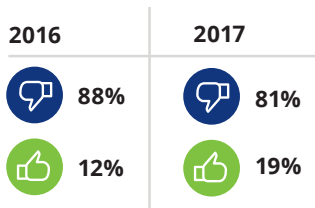
In looking at regular uses of mobile devices, the majority still use it for just checking bank balances at 47% with only 8% using mobile payments weekly for online purchases.

Frequency of mobile payment activities, at least once a week

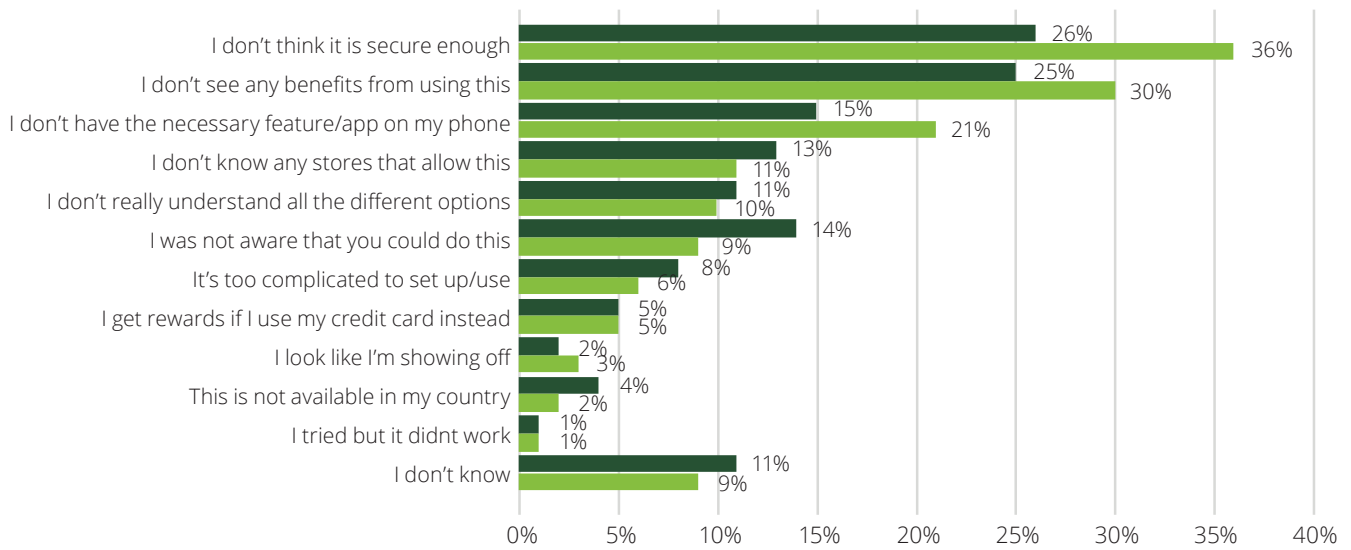


Source: Irish Cut, Deloitte Global Mobile Consumer Survey, 2017
 Base: All adults 18-75, Ireland 2017: 933

Have you used your phone for an in-store payment?



Main reasons why smartphones are not used to make payments in-store



Source: Irish Cut, Deloitte Global Mobile Consumer Survey, 2017
 Base: All adults 18-75 who never use their phone to make an in-store payment

■ IE 17 ■ IE 16

6. The Internet of Things era is here

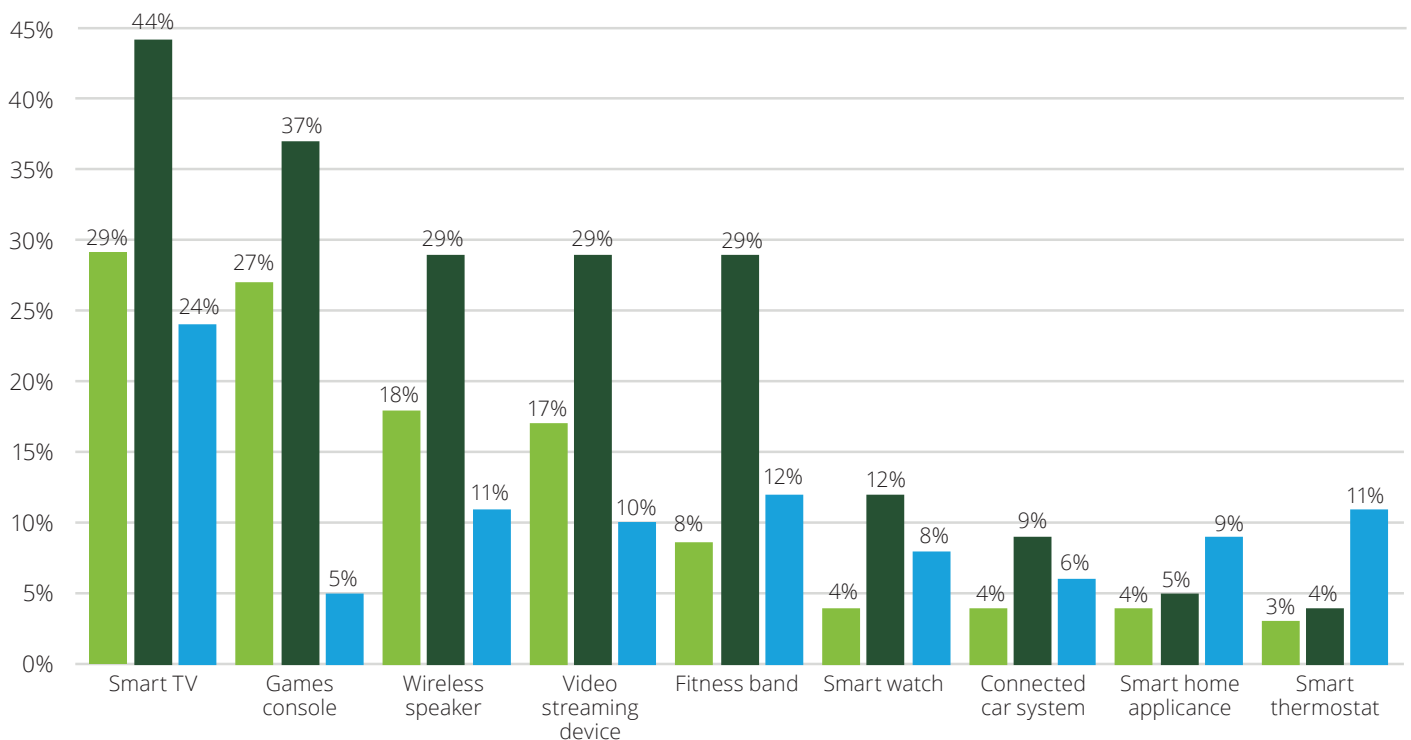
83% of Irish people have access to at least one IoT device against a European average of 73%. Only the Norwegians at 85% have a higher level of access to IoT devices than the Irish.

The predominant device is Smart TVs with an ownership level of 44%, up from 29% in the prior year with the big increase being in fitness band ownership which has increased from 8% to 29% between 2016 and 2017. With consumers intending to purchase smart TVs (23%), wireless speaker (12%), fitness band (12%) and smart thermostat (12%), we expect to see IoT penetration increase into 2018.

The growth in IoT devices and their ability to influence various industries cannot be underestimated.

- With Smart TVs, consumers now have the choice to use OTT services such as Netflix and they are no longer tied to terrestrial broadcasters. With Smart TVs, comes a distinction between broadcasters and content owners. A content provider could now deliver content into your sitting room and this is where we expect to see real change. Already, we are hearing of Disney looking at creating their own television service to rival Netflix and Amazon.
- How health insurers will use health data collated from IoT devices is still in its infancy but we expect to see some forms of rebates being provided to those who can keep designated health KPIs within safe zones.
- In the home, we are already seeing the impact on heating and entertainment. Next up, we expect to see more interaction with other household devices and at some stage the use of the IoT to assess inventory of and best before dates of food.

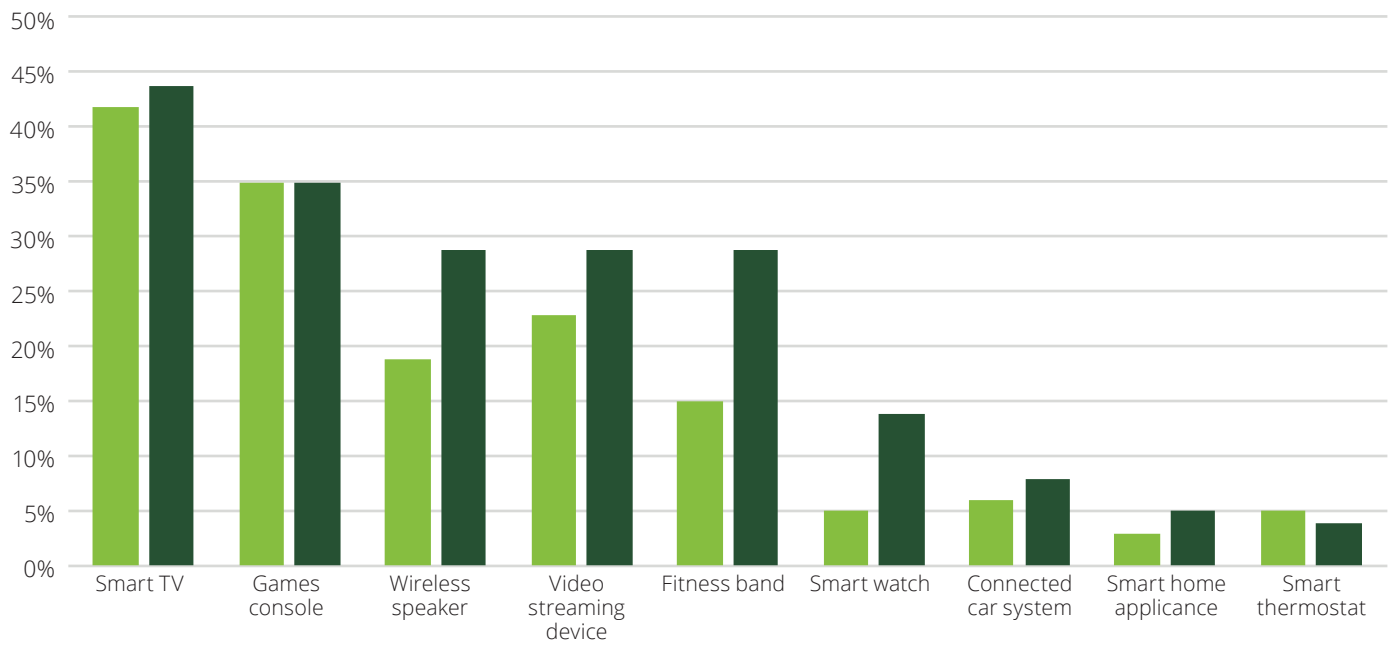
Ownership of IoT devices



Source: Irish Cut, Deloitte Global Mobile Consumer Survey, 2017 & 2016
Base: All adults 18-75

■ IE 16 ■ IE 17 ■ Expected purchase in 2018

UK vs Ireland, ownership of IoT devices



Source: UK & Irish Cut, Deloitte Global Mobile Consumer Survey
Base: All adults 18-75, Irish cut: 932, UK cut: 8,781

UK Ireland

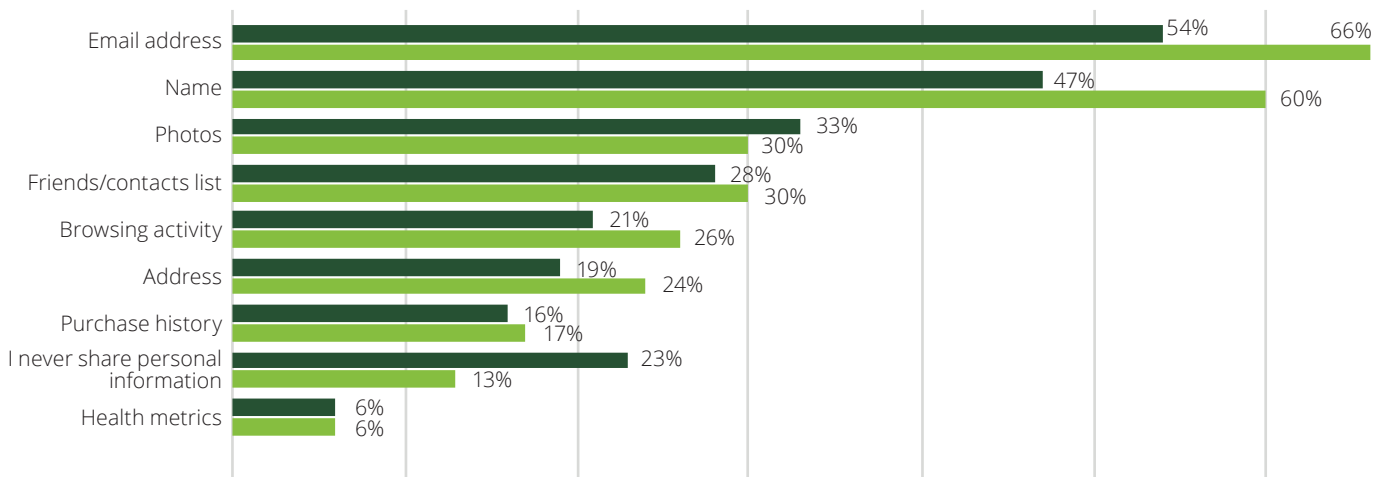
7. We are happy to share our online information

Increasingly, Irish people are content to share information on line, knowing what that such information may be used by third parties. The general perception is that if such sharing can mean they are provided with the option of more focused goods or services, it's a good thing.

Across Europe, there is little variance in how consumers view the sharing of online information. 75% of Irish people are aware that companies use their personal data against a European average of 73%.

What is evident is that consumers give consideration to what specific information is shared and will be slow to share information such as health metrics. Between 2016 and 2017, we have seen an increase in the number of people who understand what information is being shared. We have also seen a decrease from 24% down to 13% of people who says they never share information online.

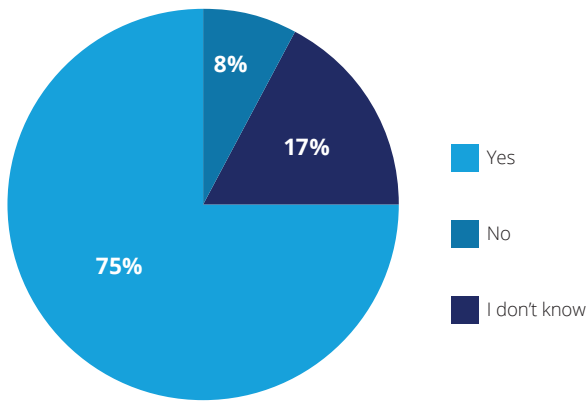
Information people already share online to companies



Source: Irish Cut, Deloitte Global Mobile Consumer Survey, 2017
 Base: All adults 18-75, Ireland 2017: 1,003

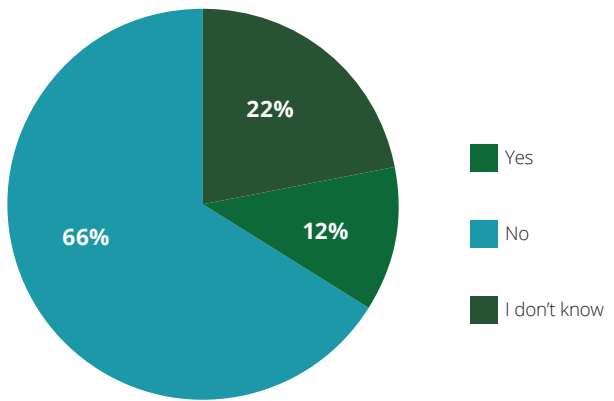
Ireland UK

Do you believe that the companies you interact with online use your personal data?



Source: Irish Cut, Deloitte Global Mobile Consumer Survey, 2017
Base: All adults 18-75, Ireland 2017: 1,003

Do you believe that the companies you interact with online share your personal data with third parties?



Source: Irish Cut, Deloitte Global Mobile Consumer Survey, 2017
Base: All adults 18-75, Ireland 2017: 1,003

About the research

The Ireland data set is part of Deloitte's annual Global Mobile Consumer Survey, a multi-country online study of mobile phone users across the world. The 2017 study is comprised of approximately 53,000 respondents across 33 countries and six continents. Data cited in this report are based on a nationally representative sample of 1,000+ Irish consumers aged 18-75. The sample follows a country specific quota on age, gender, region, work and socio-economic status. Fieldwork took place between May and June 2017 and was carried out by Ipsos MORI, an independent research firm, based on a question set provided by Deloitte.

This summary report provides a snapshot of some of the key trends and segment insights the survey has revealed. Additional analysis as well as results from other countries is available on request.

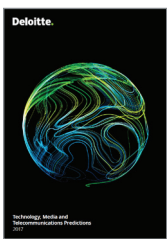
This brief report provides a snapshot of some of the insights that the survey has revealed. Additional analysis such as: ownership of IoT devices, smartphone usage for online and instore payments, smartphone purchase channel, reasons for joining/leaving mobile operators, attitudes towards triple/quad play, usage forms of communications such as IM, SMS and social networks, attitudes towards data security and refurbished phones are available upon request.

For further information about this research, please contact:

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Relevant thought Leadership



TMT Predictions 2017

This 16th edition of Deloitte's Technology, Media & Telecommunications (TMT) Predictions presents a fascinating array of trends, each developing at its own momentum, which will impact UK business in 2017 and beyond. The 2017 TMT Predictions looks at trends including the use of indoor navigation, the development of 5G, the rise of vinyl and the introduction of automatic emergency braking.



**Deloitte Consumer Review
Navigating Cyber Risks: Smooth Seas or Stormy Skies Ahead?**

In the evolving digital economy in which we live, the data businesses collect on their customers and clients presents both significant risks and notable opportunities. How companies prepare now will have an increasing impact on how well they are able to navigate these new horizons and capture their benefits.



**Social Progress in Ireland 2017
An Irish Perspective**

Deloitte and the Social Progress Index have been working together since 2013 to gain a global view of people's quality of life across 128 countries, including Ireland. The Index measures performance in Ireland on basic human needs, foundation of wellbeing and opportunity, independent of a country's wealth.



**The TMT industry post Brexit
How will Technology, Social Media and Telecoms (TMT) companies in Ireland be affected post Brexit?**

The decision by the UK to leave the EU means that every part of the UK economy starts to grapple with the implications of our departure from the EU. There are also significant impacts for the Irish domestic economy and exporters.

Notes

A series of 25 horizontal dotted lines for taking notes.

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