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Foreword

The smartphone has become intertwined into our daily lives, with 98% of smartphone owners using their devices on a daily basis. Smartphone capabilities and utilities are becoming ever greater and usage continues to evolve.

However, 2018 is the year when we have started to see a balancing in our addiction to smartphones. 56% of us are admitting that we use our mobile phones too much while 50% of us believe our partners use their mobile phones too much. With a large increase in the use of mobile devices by over 65's, 2018 is the year where 1 in 5 of consumers believe their parents use mobile devices too much.

2018 is also the year where we are seeing the phone starting to replace cash and cards as a primary means of payment. Phone payment companies have been slow to serve the Irish market, having concentrated on larger markets first, however with their introduction, we have seen a 13% increase in usage of mobile payments with increases expected in future years.

Other trends we are seeing in 2018 include:

- An increase in our willingness to pay for mobile online content, be that for films, music or news.
- Wearables becoming mainstream but not at the expense of vanity as devices such as smartwatches continue to grow, while Virtual Reality Headsets appear to be going the same route as 3D television.
- PINs continue to be our preferred method of securing our phones despite most phones having biometric security options available.
- With an increase in the use of mobile apps, access to 4G data is increasingly an important consideration for Irish mobile users in assessing the appropriate network for them.
- As expected in a year where GDPR legislation was introduced, Irish consumers continue to understand how their data can be used by companies but are willing to allow this, if it means a more bespoke service for them.

We hope you find this report useful and, like us, we hope you will find the analysis insightful. I would like to appreciate the efforts of Lorcan Finnegan and Luke O'Shaughnessy from Deloitte who were involved in analysing the data and deriving meaningful insights and who gave me first-hand experience of how millennials actually use their mobile devices.

Handwritten signature of Richard Howard in black ink.

Richard Howard

Head of Technology, Media and Telecommunications Industry Group
Deloitte Ireland

Handwritten signature of John Kehoe in black ink.

John Kehoe

Director, Technology, Media and Telecommunications Group
Deloitte Ireland



The statistics behind the Irish mobile consumer



93%
of Irish consumers
own or have
access to a
smartphone

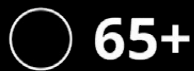


97%
of people have
access to some form of
mobile phone
(smartphone/phone).



The number of
+65 year olds
with access to an e-reader
has increased from
30% to **45%**

Access to tablets among the



65+
market has
grown from

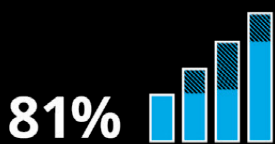
57% to 70%
in 2017 in 2018



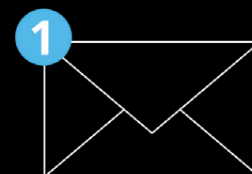
33%
of Irish
consumers
use their
smartphone to
monitor their
fitness levels



82%
of consumers
have access to a
connected device



81%
of Irish people consider the
quality and coverage of
their mobile network's
data coverage to be very
important



68%
of Irish consumers
use their phones
to check their
personal email at
least once a day



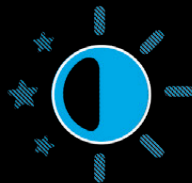
76%
of Irish 18-24 year olds
have a "pay as you
go" contract



Irish smartphone users
look at their phones
55 times
a day on average

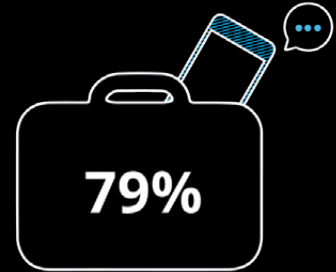


13% of Irish people admit to checking their phones over **100** times a day



56%

of Irish smartphone users think they use their phones too much against 39% in the UK



79% of Irish people use their smartphones for work related business activities



73% of people have used mobile/online banking on their phones (5% increase on last year)



68% of 18-24 year olds watch live videos or stories on social media on a daily basis



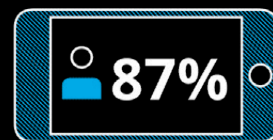
39%

of Irish people regularly use fingerprint recognition to unlock their device and authorise transactions

27%



of people stream a film or TV series at least once a week



87%

of consumers are concerned about how online companies share their personal data with third parties



Trends

1. Self-realisation of our mobile addiction

With 98% of Irish smartphone users using their device every day, there is no doubting that we are reliant on our smartphones as much as anything else in the world today. Although Irish smartphone users check their phones 55 times a day on average, there appears to be a heightened realisation amongst Irish people that maybe we have an unhealthy addiction to our mobile devices - this is down from an average of 57 times a day in 2017.

56% of Irish people are of the opinion that we use our mobile phones too much compared to 50% in 2017 and 45% of global adult smartphone users. Meanwhile, in the UK, only 39% of people are of this opinion, highlighting the extent to which Irish people have realised their addiction.

But not only are we noticing our own over-reliance on smartphones, we are seeing it in the people around us as well.

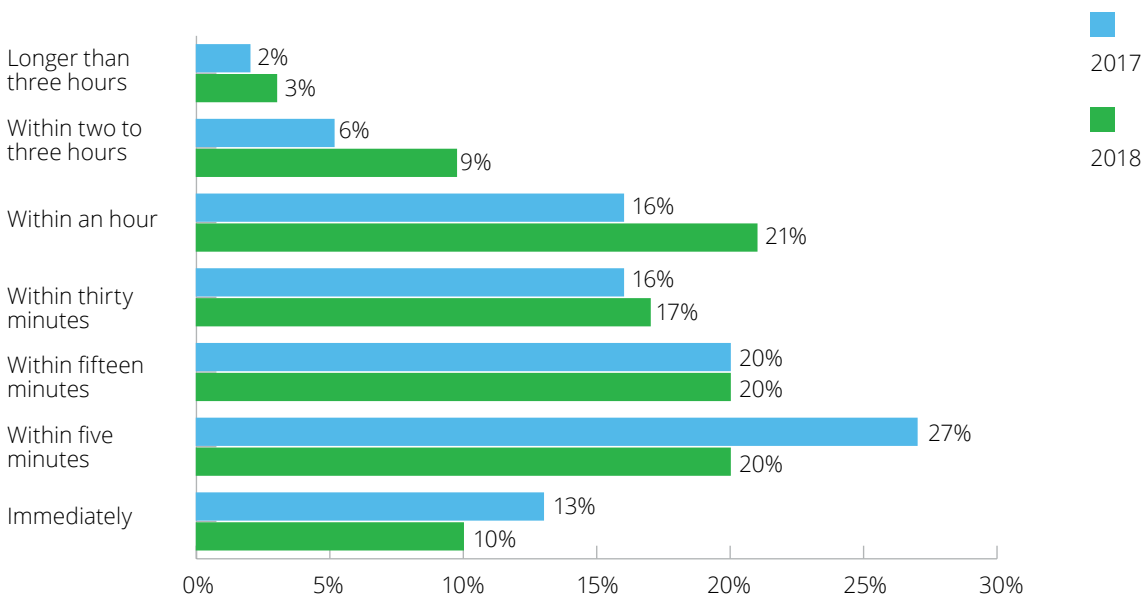
Irish people across the board are becoming more perceptive of phone usage in general and perhaps more aware of the dangers that over-use can cause, with 35% of people citing increased levels of distractions when trying to complete a task and 33% citing not going to sleep on time as some of the common issues that arise from over-use of mobile phones.

However, it appears that Irish people are beginning to take action. In 2017, 76% of consumers checked their phone within 30 minutes of waking. This is now down to 67% in 2018. Although our mobile phones are undoubtedly useful and can help to make our lives significantly easier, a third of Irish people appear to be content at being "phone-free" for the beginning of their day.

Those who think that their (...) use(s) their phone too much	IE 18	UK 18	IE 17
Own-self	56%	39%	50%
Partner/Spouse	50%	55%	43%
Children	60%	56%	61%
Parents	19%	18%	12%



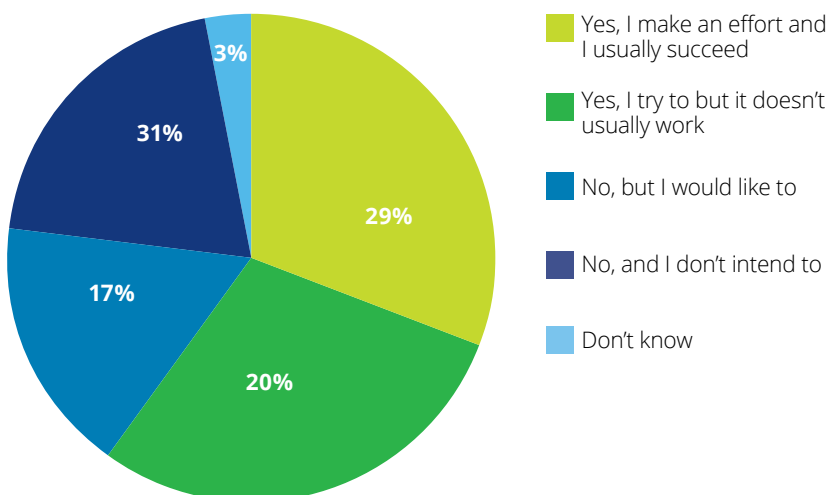
How long is the interval between waking up and looking at your phone for the first time?



Overall, 49% of Irish people claim to make some type of effort to cut down on the amount of time they spend on their phones (34% in the UK), with 29% succeeding in such attempts – which is 4% more than in 2017 and 11% more than those in the UK

(18%). This growing mind-set, to reduce our phone usage, has contributed to 18-24 year olds now checking their phones 82 times a day, on average, compared to 104 times a day last year.

Do you try to limit your mobile phone usage?





2. Mobile commerce moving from adolescence to adulthood

It has been threatening to do it for a while now but mobile commerce has finally done it. It's taken that massive step from adolescences into adulthood and come of age.

In years gone by, mobile commerce was something of an irregularity. People were cautious about engaging in mobile online business as to most it was still uncharted territory. With the smartphone revolution and our constant immersion in the online world, mobile commerce has become the norm.

Smartphones have become an integral part of the business world with 79% of people admitting they use smartphones for some sort of business-related activity rising by 7% from last year. This stat is significantly

greater than the UK with 66% using their smartphone for work related activities. The most common activities are reading and sending emails, calendar management, voice calls to clients as well as skype to colleagues and clients.

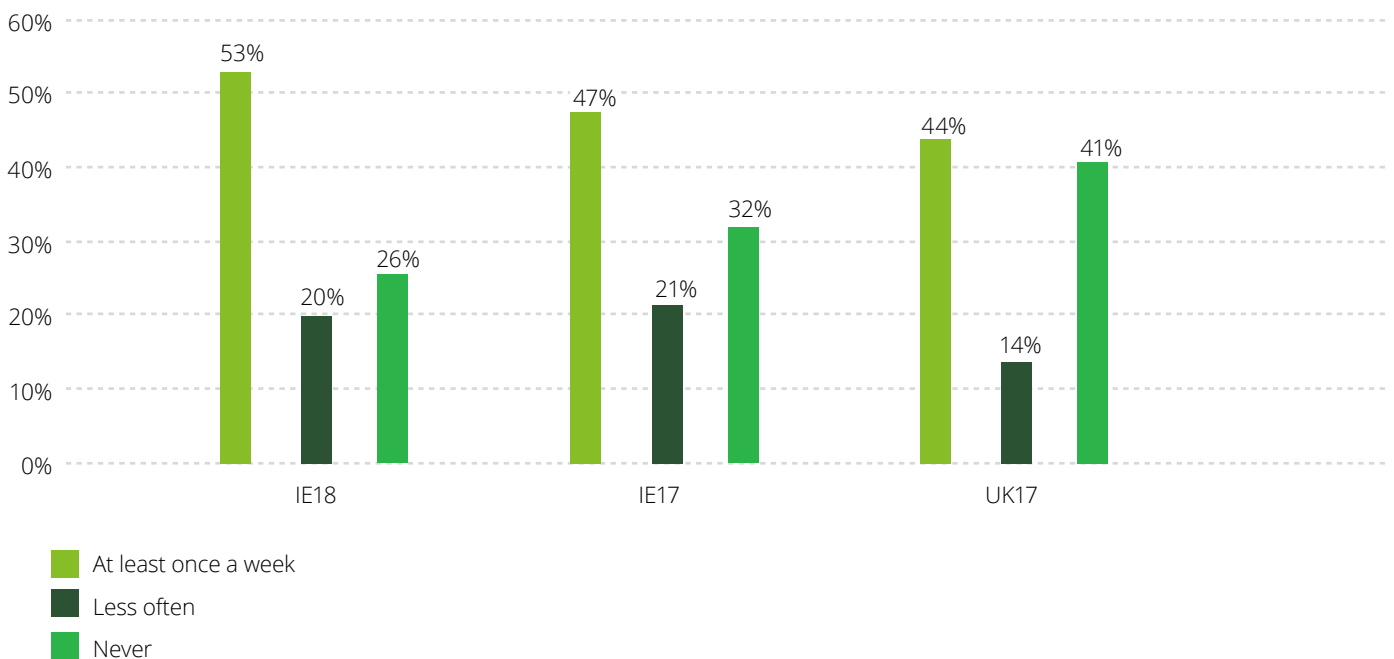
Online banking and shopping are popular forms of mobile commerce with 52% and 53% of people using the services weekly. Both activities have grown in popularity from 2017 increasing by 6% and 11% respectively. Other services available to the consumer include the ability to pay for transport, manage investments and insurance policies which demonstrates the wide variety of services available to the consumer on their smartphones.

The development of payment methods such as Apple, Android and Samsung Pay have also had a major impact on the

world of mobile commerce as people are beginning to move away from the traditional methods of paying for goods and moving towards using their phones to pay for products and services. This year this form of payment grew by 13% collectively however Apple Pay saw a 19% rise with Android rising by 16%.

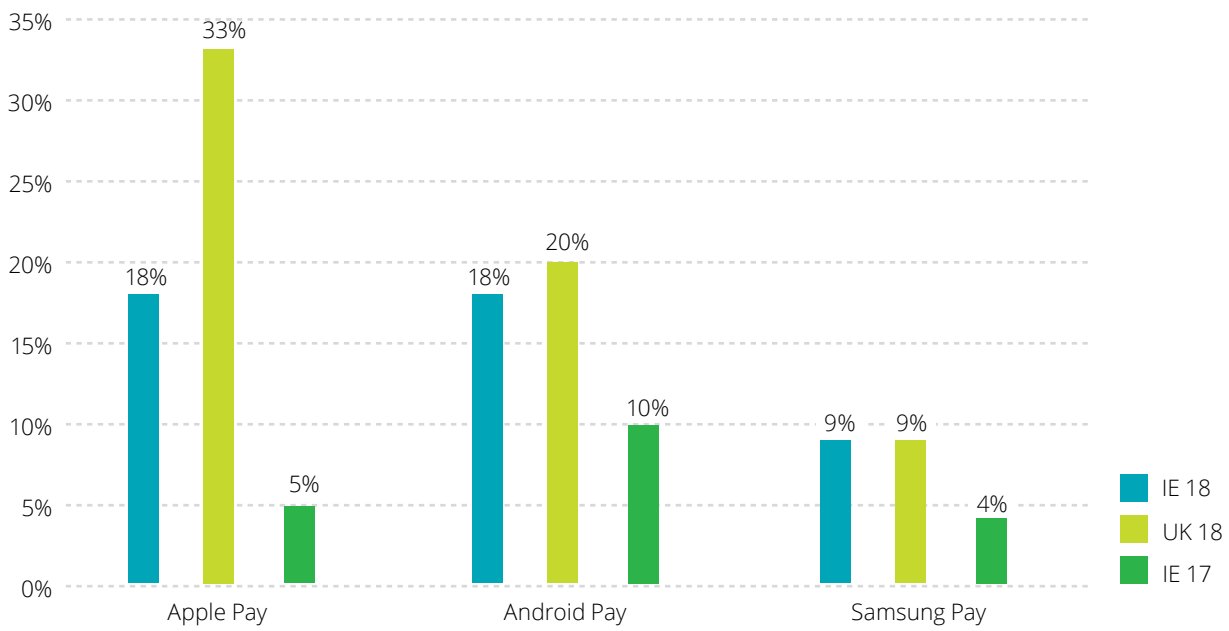
This year mobile commerce has definitely come of age. The majority of activities can now be done online which has resulted in a mass increase of business taking place on the smartphone. It has also become a vital part of a worker's equipment. Furthermore, the impact of payment apps illustrates how phones are now replacing wallets.

Checking bank balance online

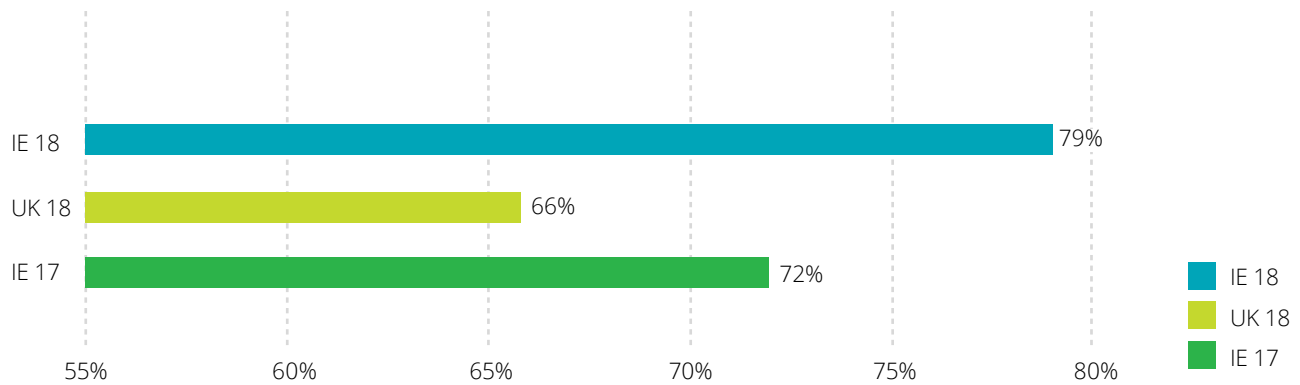




% of people using mobile payment apps



% of people using mobile phones for any work related business activities





3. Subscribing to quality – paying for premium content

Digital subscription services are a growing trend with an increasing number of people willing to subscribe for the right to access exclusive or premium content, whether it be television programmes, movies, music, or news articles.

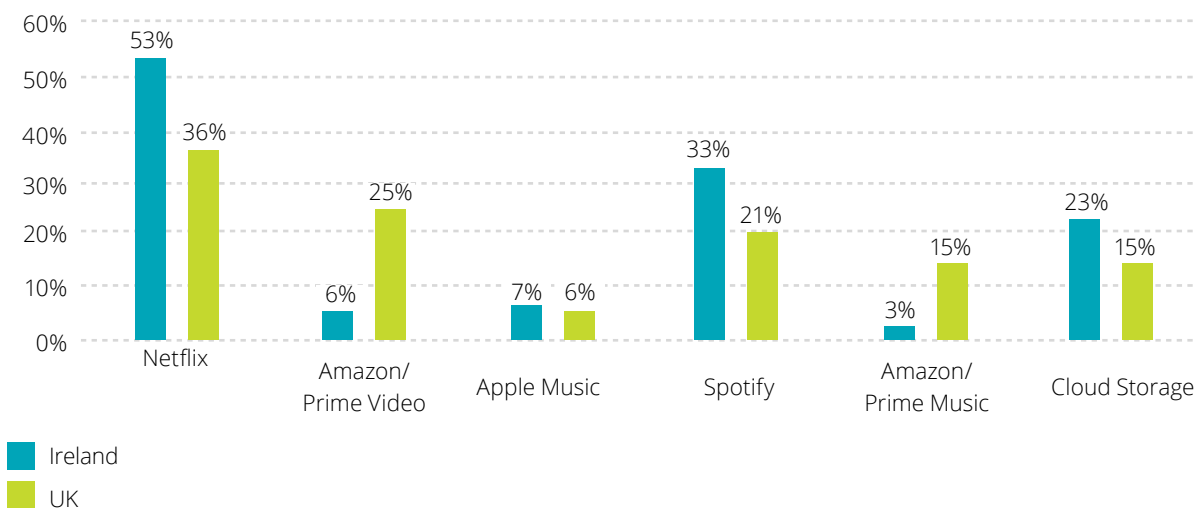
Video on demand is undoubtedly the most popular form of digital subscription with 55% of people paying for premium mobile subscriptions. Netflix, unsurprisingly,

leads the way with 53% of Irish people surveyed having access to the subscription service, which is 17% higher than in the UK. 500,000 Irish households currently have access to a Netflix account, according to a recent survey from Comreg, the Irish telecoms regulator.

The popularity of Netflix could be down to several factors, including the ability to catch up on complete TV series, along with access to a large library of movies and documentaries. Furthermore, the

company's decision to commission some of its own TV shows and movies has likely assisted in attracting more consumers to the platform. As a result, it has been difficult for other streaming services like Amazon Prime Video to increase its Irish user base (6% compared to 25% in the UK) when Netflix is such a major force in the market.

Access to subscription services





41% of Irish consumers have a music subscription with Spotify being the leading player in the Irish market with 33% of those surveyed subscribing to the service. If the free version of Spotify is used, listeners have to deal with regular advertisements that can break up their playlists or albums. Therefore, the ability to access ad-free music (similar to Netflix offering ad-free television) is a considerable advantage that people appear to be willing to pay for. Music platforms like Spotify, Apple Music (7% of Irish consumers) and Google Music (6%) can also offer music libraries of millions of songs which are stored in the cloud and can be streamed on demand straight to a person's device rather than taking up storage space on a person's smartphone or computer. Additionally, while music services are relatively cheap for regular listeners of music (about €10 per month, which is only the price of a single CD), there may need to be cheaper choices available to attract more casual music fans.

Meanwhile, in this era of fake news, 35% of Irish people have a subscription to a newspaper with most of these being Irish run and owned, for example, The Irish Times (14%) and The Irish Independent (15%). Such subscriptions, albeit not all being subject to a paywall usually give subscribers access to exclusive, high-quality reporting pieces in exchange for a small fee per week or per month. UK based newspapers like The Times (3%), The Guardian (2%) and the Financial Times (1%) also have some Irish subscribers who are willing to pay the additional fee for premium content.

4. PIN continues to be the primary access point

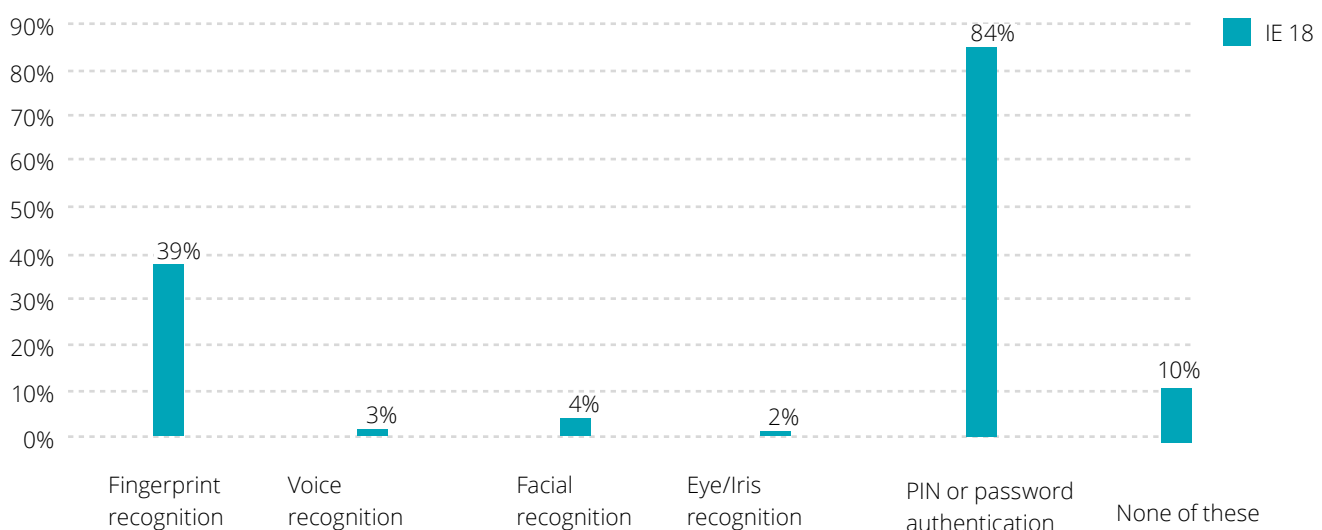
The personal identification number continues to be the favoured form of access security used by mobile consumers.

With more secure biometric options available, one would expect to see a higher uptake in their usage and the PIN slowly decreasing in usage.

No, is the answer plain and simple, the pin has continued to be the primary access point for smartphones with 84% of people using a PIN to authorise transactions. As a consumer you may feel that with the innovation in phone security that the old methods like the PIN are comparably less secure as new approaches such as fingerprint and facial recognition come to the fore. What we are seeing, however, is the usage of PINS in conjunction with the newer methods. PIN usage remains constant, however, year on year we have seen a 9% growth in fingerprint recognition with increases in the usage of iris, facial and voice recognition also.

As the security measures improve there is a possibility that we will see a drop off in the amount of people using a PIN. PIN usage in the UK currently stands at 66% however for now it appears the PIN is here to stay for the Irish mobile consumer.

Methods used to unlock phone or authorise payments





5. Give me a wearable I can use in public

Wearables are moving upwards again this year as their popularity continues to grow. Since last year ownership of smart watches has increased by 5% (rising from 6% to 11%) whilst fitness bands had an even larger increase jumping from 15% to 21%. Not only have more people access to the smart watches and fitness bands, the owners are using them regularly with 64% and 69% using them at least once a week. Irish numbers are slightly behind the UK where weekly usage by owners is 72% and 74% respectively.

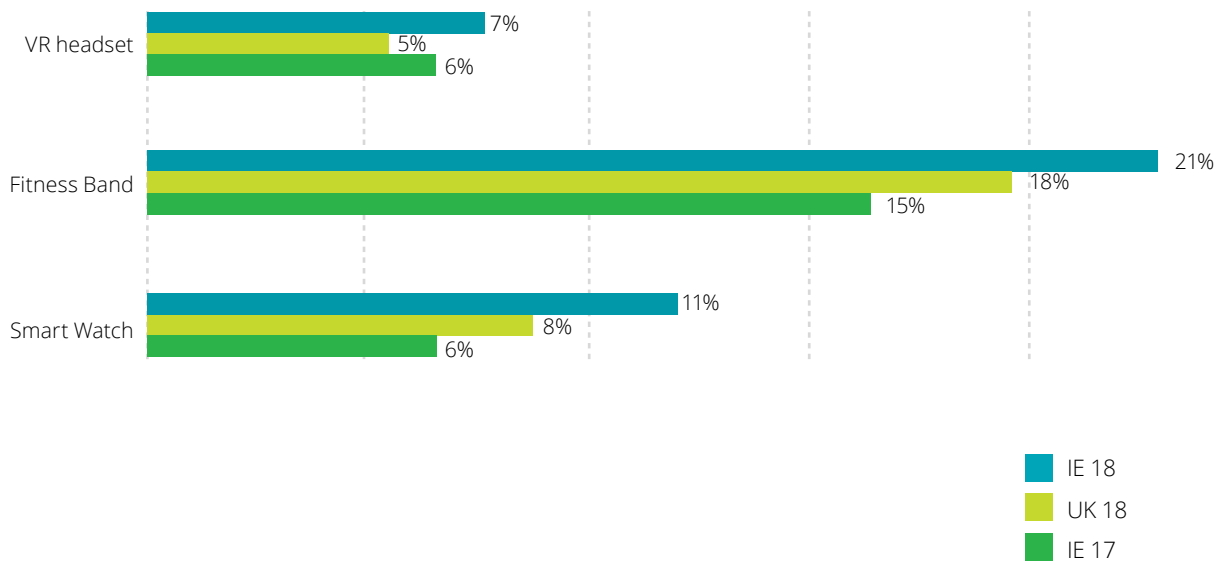
So, it is understandable if you were to believe that VR headset usage has increased too. It seems like that's where the similarities end. In the same time that

we have seen the rapid increase of smart watches and fitness bands, virtual reality headsets have stagnated. Similar to the fate of products like 3D television which was subsequently canned by Sky in 2017 and Google glasses which ceased producing in 2015, it appears that VR headsets are not achieving widespread usage.

Although, accessibility to the devices is similar to the smart watch the amount of owners who use the VR headset is significantly less with only 13% of those who have access to the VR headset using them weekly with a further 31% of owners not using them in the last three months. This is in stark contrast to the usage of smart watches and fitness bands.

Wearables are a growing market, however vanity plays an important role in their adoption and manufacturers will need to learn that discrete wearables are where consumers will engage. With the decrease in the attractiveness of VR for consumers, we will be interested to see how enterprise adoption of VR is affected. It had been anticipated that VR would make inroads to the enterprise market over the next number of years, however, if consumers are slow to use them outside of the office, they may also be slow to use them inside the office.

Access to wearables



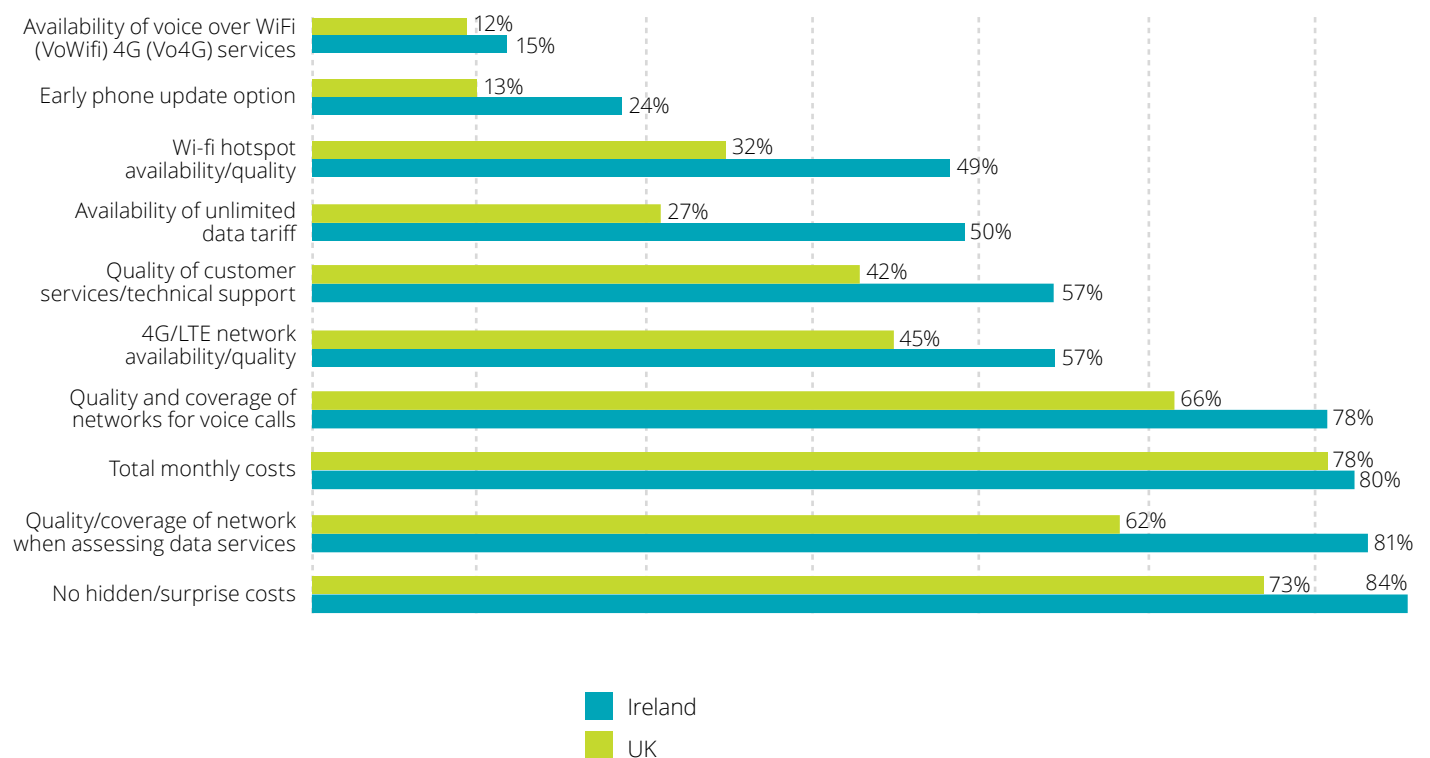


6. I want my data and I want it now!

The importance of mobile data for Irish consumers has continued its trend upwards with more people now rating quality data coverage as a key mobile service. Driven by increased data requirements of many apps, we are starting to see the impact of those who have 4G versus those who do not and Irish consumers are starting to see this as a differentiator.

- 81% of people view the quality and coverage of a network, when they are accessing the internet or data services, as being very important – which represents an 11% increase on the previous year and is 19% higher than in the UK. This may be due to increased effort required of mobile providers to cover all Irish users, which result in many areas not receiving 4G signals, against the vast majority of the UK population being covered by 4G.
- The availability and quality of 4G networks is considered very important by 57% of Irish people – this is at 45% among UK consumers and was previously only 42% in Ireland in 2017. It is also 62% in the Dublin area compared to an average of 55% across the rest of the country.
- Meanwhile, having been considered “very important” by only 36% of Irish people in 2017, there has been a rise of 13% in those that view the availability and quality of Wi-Fi hotspots to be a key mobile service.
- 50% of Irish consumers consider the availability of unlimited data tariffs as being significant compared to only 27% among British people.

Which mobile services are important to you?

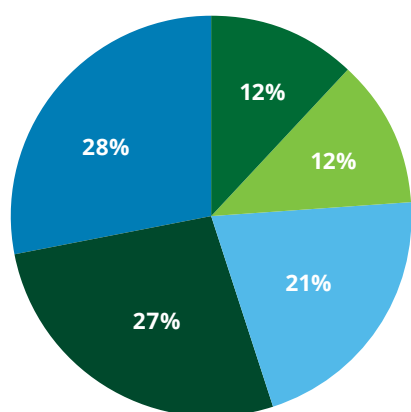




5G networks are expected to be the next step when it comes to mobile data and are capable of providing speeds up to 5 times faster than 4G. With this in mind, it appears Irish consumers are already interested in improving on their 4G data speeds with 21% stating that they would switch to a

5G network as soon as it is available while a further 27% said they would switch provided it is proved to be a success. This further highlights how willing Irish consumers are when it comes to improving the quality and access to mobile data and the internet.

5G network



- I would switch to a 5G network as soon as it is available
- I would switch to a 5G network if I start hearing good things about it
- I would probably switch to a 5G network eventually
- I would switch to a 5G network if it was the standard offering and there was no alternative
- Don't know

No hidden or surprise costs also continues to be listed as a “very important” part of mobile services for 84% of Irish consumers while 80% of people further consider the total monthly cost of a network plan to be “very important”.

Overall, we are seeing that a greater number of mobile services are now being viewed as essential elements by Irish consumers when signing up to a network plan. This is likely to have a ripple effect on the services (and the quality of such services) that network providers will need to offer to meet the market demand and secure their consumer base.

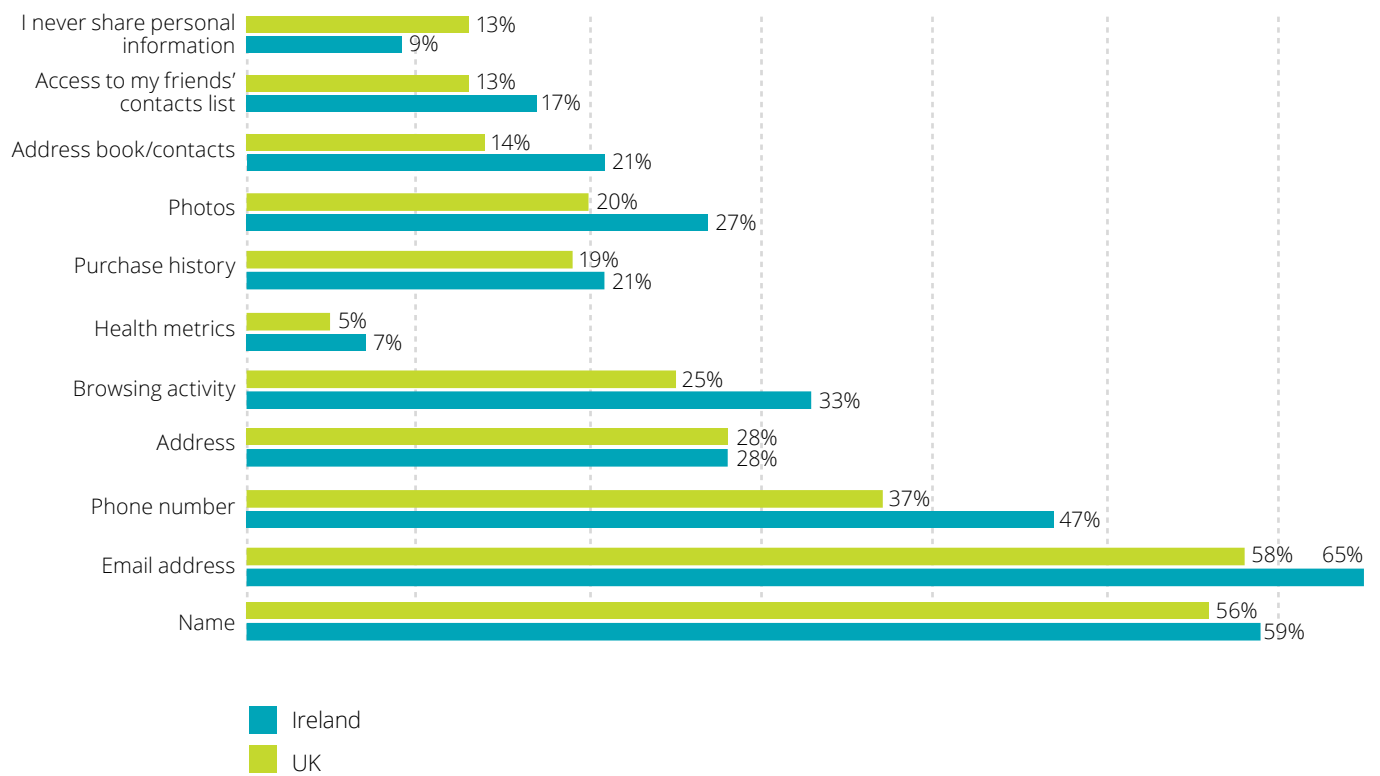
7. Consumer data.....walking the tightrope

Irish people are still quite open when it comes to what data they are willing to share with most of the companies they interact with online. In 2018, there was a decrease from 13% to 9%, of people surveyed who said that they never share information online. This represents a fall from approximately 1 in 4 people in 2016 to around 1 in 10 people in 2018. This increasing openness to sharing data is likely as a result of people recognising that they can receive a more personalised experience from the companies they interact with online. While there has been little change in the percentage of people sharing their names, email addresses and phone numbers online, there was a rise

of 7% in those who share their browsing activity with third parties online (while also being 8% higher than in the UK) and a 4% rise in Irish consumers who share their purchasing history. However, Irish consumers are also less likely to share more sensitive data such as health metrics (7%), highlighting that people do consider what information they are willing to share.



Information people share with companies online



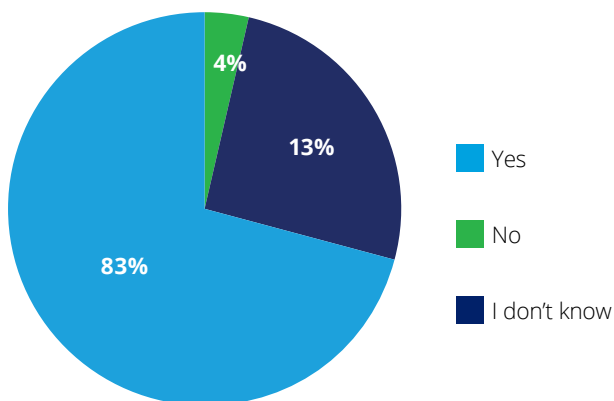


83% of Irish people believe that companies use their data, which represents an 8% rise against 2017, and corresponds to UK data (82%). However, the fact that they still share their data with these companies despite knowing that such companies use it and share it with other third parties, doesn't mean that Irish people don't have their concerns.

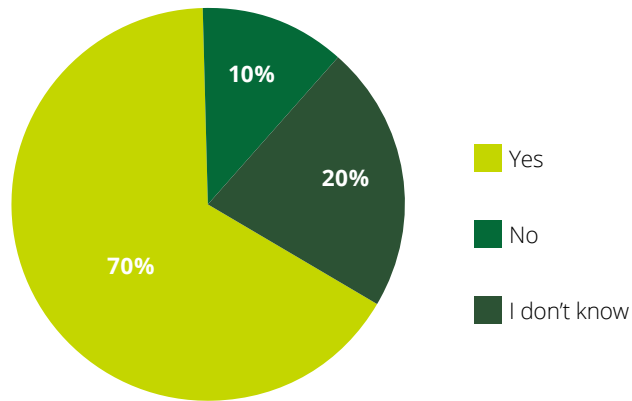
- 82% of Irish consumers are concerned with how companies use their personal data.
- 80% are concerned with how companies store their personal data.
- 87% are concerned with how companies share their personal data with third parties.

In general, although companies are likely to continue to see an increase in people who are willing to share their personal data online and an increase in the types of data people are comfortable sharing, concerns still remain.

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

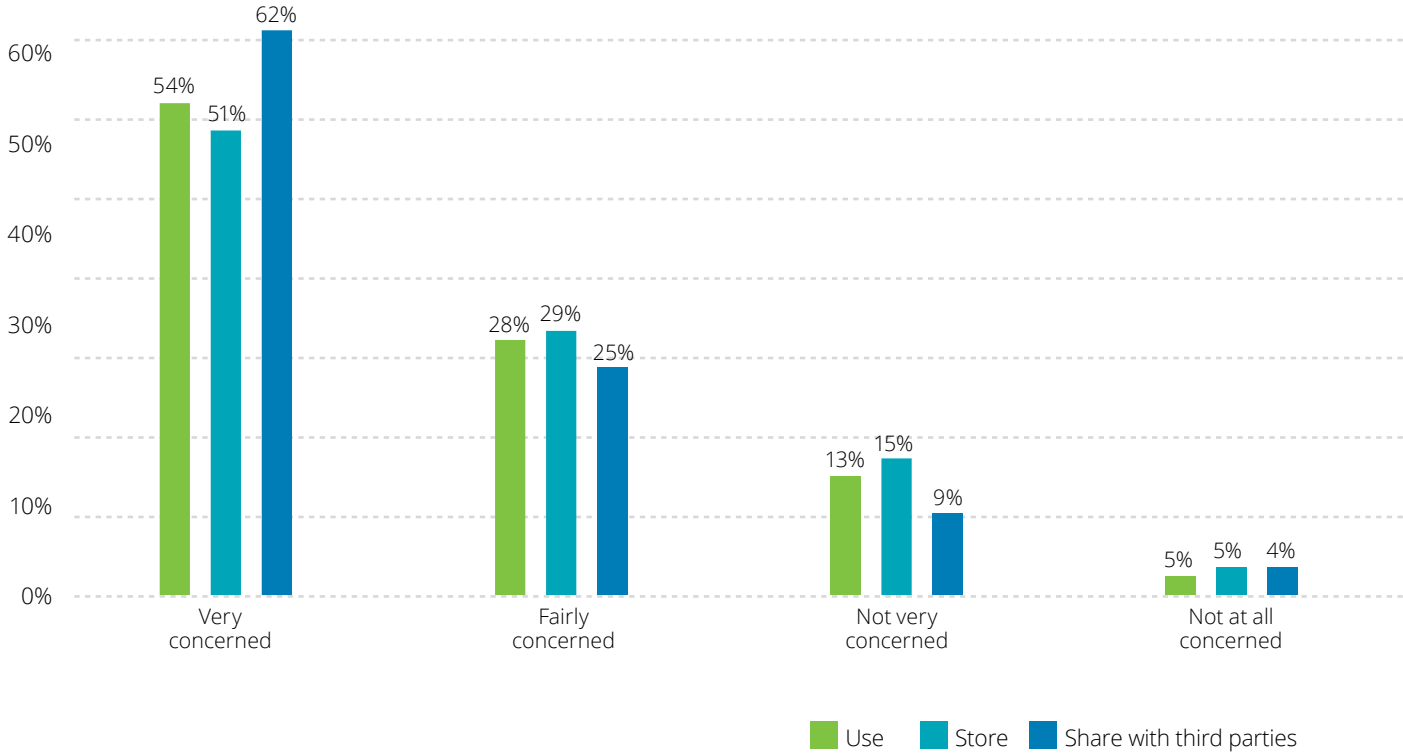


Do you believe that the companies you interact with online share your personal data with third parties?





**How concerned are you that companies use/
store/share your data with third parties?**

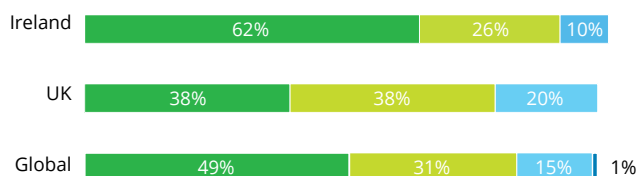




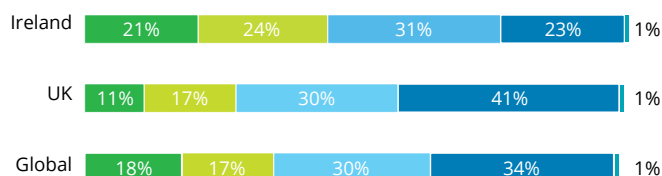
How Ireland compares globally, and to the UK in our modes of communication

How often, if at all, do you use each of these on your mobile phone?

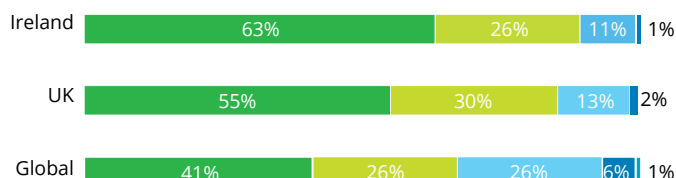
Voice calls



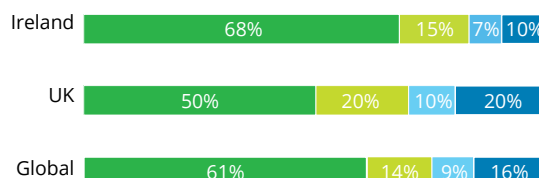
VoIP



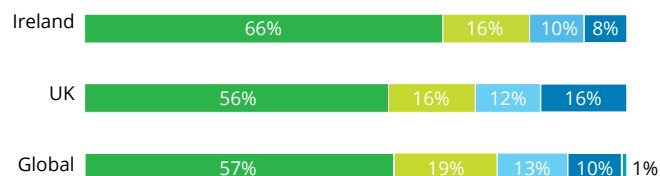
SMS



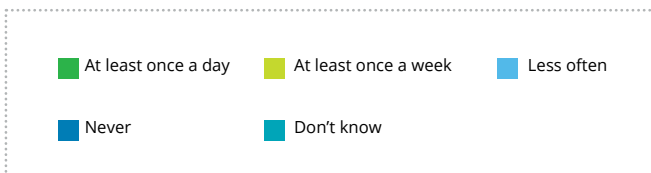
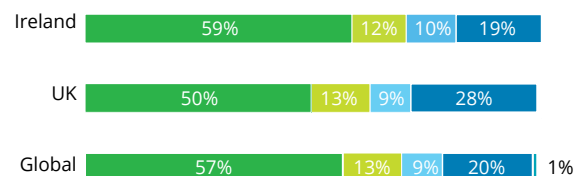
Instant messaging app



Email



Social media



Base: All adults 18-75 who have a phone or smart phone





The Mobile Consumer Survey 2018 is a comprehensive survey of over 1,000 Irish people to assess their behaviour, usage and views of the mobile consumer

This report briefly outlines some of the key trends arising in the survey, however if you would like to discuss any further insights arising from the survey, please feel free to contact us.



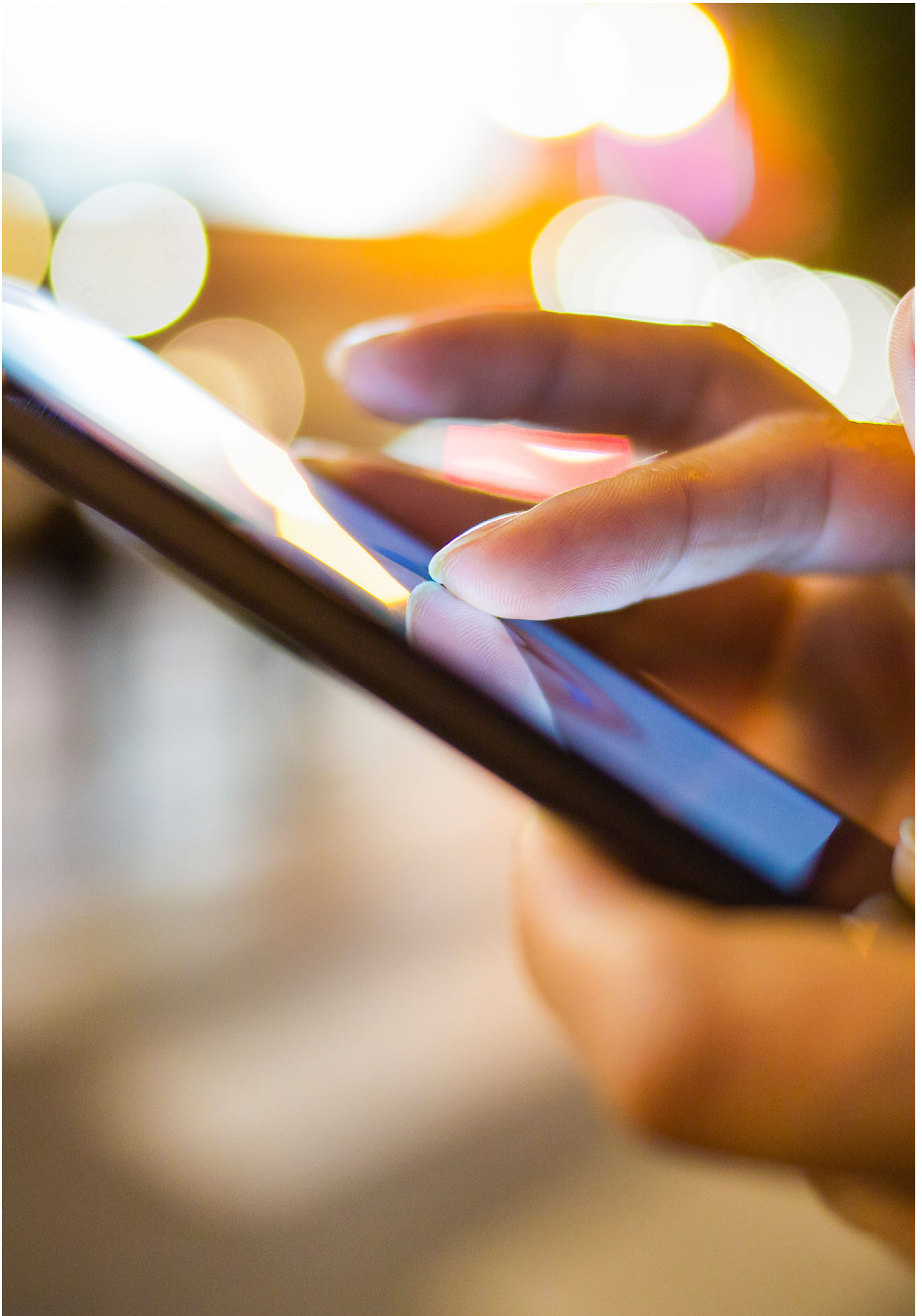
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**Other areas of interest dealt with
as part of the survey include:**

- Views on network operators
- Mobile device buying preferences
- Usage of communication services on mobile devices
- Machine learning trends in mobile applications
- Home internet trends
- Mobile phone usage for work



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