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Research Brief

Profile of Smartphone Ownership and Use in Ireland

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Contents

Executive Summary

- The purpose of this research brief is to provide a current profile of smartphone users in Ireland.
- This brief was conducted in the context of the Covid-19 pandemic and the public health-led response in Ireland in relation to digital contact tracing.

Key Findings

Smartphone ownership, usage, and managing personal information

The rate of smartphone ownership and patterns of usage are key to the success of digital contact tracing. Population-level research evidence for Ireland shows:

- A high level of smartphone ownership overall, but with lower rates among older age groups (TILDA, 2019; CSO, 2018; ComReg, 2019), specific occupations (those engaged in home duties), materially deprived groups, and in border areas (CSO, 2018; ComReg 2019);
- Samsung has the majority of market share at 40%, followed by the Apple iPhone at 32% and Huawei at 13%. Apple iPhone, has the majority market share for those aged 18-24 at 45% (ComReg, 2019)
- A majority of the population report a preference for restricting or refusing access to personal data when installing or using apps and a minority report a preference for restricting access to geographical location (CSO, 2018); and,
- In terms of managing access to personal information on the internet, a majority of the population reported sharing personal identification details (name, date of birth, identity card number, etc.) payment details (credit or debit card details, bank account number, etc.), and contact details (such as home address, phone number, e-mail address, etc.) (CSO, 2018).

Introduction

Purpose

The purpose of this research brief is to provide a current profile of smartphone users in Ireland. This brief was conducted in the context of the Covid-19 pandemic, and the public health-led response in Ireland in relation to digital contact tracing using a mobile phone app.

A significant enabling factor for the effectiveness of mobile contact tracing is the rate of smartphone ownership and smartphone user behaviour and preferences, in any given population. This research brief is presented as a synthesis of key findings from recent population-representative surveys in relation to smartphone ownership and usage.

Scope

It is important to note that at the time of review, there is a dearth of survey research on the use of smartphones for contact tracing specifically. The evolving nature of intelligence in this area presents a challenge for translating evidence for decision-making. The profile may be updated periodically to incorporate emerging evidence in this field.

Profile of smartphone ownership and use in Ireland

It is evident that the effectiveness of mobile contact tracing is dependent on several baseline characteristics and behaviours, namely smartphone ownership and usage. A review of datasets and surveys identified the following five sources for the adult population in Ireland:

- CSO (2018) 'Information Society Statistics - Households';
- Commission for Communications Regulation (2019) 'Mobile Consumer Experience Survey of Consumers';
- Irish Longitudinal Study on Ageing (TILDA) (2018) Wave 5;
- Deloitte (2019) 'Mobile Consumer Survey – Ireland'; and,
- Ipsos MRBI (2019) 'The Right Click? Measuring Trust in Online Health Information' - A report, in partnership with MSD Ireland'.

CSO (2018) 'Information Society Statistics - Households

The purpose of CSO's annual 'Information Society Statistics – Households' survey is to collect data on the level of use of ICT by households and individuals. It collects data on, inter alia, the use of smartphones, smartphone security, awareness of internet security and privacy, steps taken to protect personal information online and use of e-Government.

Use of smartphones

- 77% of all individuals surveyed between 16-74 use a smartphone for private purposes (76% of males, and 78% of females);
- Smartphone usage is lowest with those aged 60-74, with 37% of those surveyed. 95% for those aged 16-29, 96% for those aged 30-44, and 77% for those aged 45-59;
- The rate of usage by those classified as 'at work' and those 'unemployed' is 89%, and 82% respectively. Students have the highest rate of usage at 98%, while the retired have the lowest at 37%. Those classified as principally engaged in 'home duties' have a rate of 67%;

- In terms of difference in usage rates by region, Dublin is highest with 88% followed by the mid-east at 81%. The border regions show the lowest rate of smartphone users at 71%;
- In terms of 'deprivation quintile', rates of smartphone users increase with wealth. Going from a low of 71% for the first quintile classified as 'very disadvantaged' to 88% for those in the 5th quintile classified as 'very affluent'.

Security precautions when installing applications (apps)

- 59% had restricted or refused access to personal data when using or installing an application (app) on smartphone at least once or was provided by the operating system;
- 64% of persons in the 16 to 44 age cohort restricted or refused access to personal data when installing or using apps, compared with just 36% of persons in the 60 to 74 years age group;
- 28% did not restrict or refuse access to personal data when installing or using apps, while 5% did not know they could do so;
- 9% do not use apps;
- 23% of smartphone users in the 60 to 74 years age group do not use apps, compared with only 2% of smartphone users aged 16 to 29 years.

Steps taken to protect personal information

- 27% restricted access to geographical location. This was an increase from 21% in 2016.
- The rate of internet users who restricted access to geographical location was greatest with those aged 30-44 at 33% and lowest for those aged 60 -74 at 15%.
- 38% of individuals who had used the internet in the previous twelve months restricted access to personal information for advertising purposes, an increase of six percentage points on 2016.
- 34% of individuals surveyed checked that any websites requesting personal information were secure websites, an increase of four percentage points on the same period in 2016.
- 30% of individuals read privacy policy statements before providing personal information.
- 34% limited access to their user profile or content on social networking sites.

Providing personal information and managing personal information online

- Personal identification details (name, date of birth, identity card number, etc.) and payment details (credit or debit card details, bank account number, etc.) had been provided by up to two-thirds and over of all individuals who had used the internet in the twelve months prior to interview.
- Contact details (such as home address, phone number, e-mail address, etc.) had been provided by almost three quarters (74%) of internet users, an increase of six percentage points on the same survey period in 2016.
- Up to four fifths and over of persons in the 16 to 29 years age group provided personal identification details, payment details and contact details in the previous twelve months.
- Other personal information (person's photos, current location, health-related information, employment, income, etc.) was provided by one tenth (10%) of individuals.

Use of e-Government

- Over half of internet users (52%) obtained information from websites or apps of public authorities or public services, while 43% downloaded or printed official forms from their websites or apps.
- Submitting completed forms online was carried out by six out of every ten (60%) of internet users.
- 73% of internet users aged 30 to 44 years submitted completed forms online, compared with just 42% of internet users in the 16 to 29 years age category.
- Of those individuals who did not submit completed official forms online, only 8% cited the reason was because of concerns about protection/security of personal data. However, this is a significant increase from 3% in 2016. Those aged 30-44 were most likely to cite this reason as to why they did not submit official forms online with 15%.

Commission for Communications Regulation (2019) 'Mobile Consumer Experience Survey of Consumers'

- Of all adults surveyed (18+; 2,838 sample) in 2019, 98% owned a mobile phone, while 84% of those with a mobile, had a smartphone;
- Within age groups, 100% of those aged between 18-24 with a mobile had a smartphone, 98% for those aged 25-34, 94% for those aged 35-49, 78% for those aged 50-64 and 47% for those aged 65+;
- Of those with mobiles, smartphone ownership is higher in social class ABC1 to F50+ at 92% than social classes C2DE to F50- at 79%;
- Of those with smartphones, Samsung has the majority of market share at 40%, followed by the Apple iPhone at 32% and Huawei at 13%;
- By age group, the Apple iPhone, has the majority market share with those aged 18-24 at 45%, while Samsung has majority market share for all other age groups.

Irish Longitudinal Study on Ageing (TILDA)

Using wave five (2018) of data from the Irish Longitudinal Study on Ageing (TILDA), we can garner further information on technology use of those aged 50 and older.

- Of those surveyed in 2018 (all aged 50+), 60% had access to apps via phone/tablet use;
- By gender, of those aged 50+, 57% of men surveyed had access to apps via phone/tablet while this increased to 63% for women;
- With regard to those aged 70+, 47% had access to apps via phone/tablet use;
- By gender, of those aged 70+, 47% of men surveyed had access to apps via phone/tablet, while for women it was marginally higher at 48%;
- When we breakdown the data further (by five-year age bands) we see a clear negative relationship between age and access to apps via phone/tablet, going from 74% of those aged 55-59 to 18% for those aged over 85.

Deloitte (2019) 'Mobile Consumer Survey – Ireland'

- According to this survey, 88% of Irish people have a smart phone;
- 33% monitor their fitness levels using a smartphone while 86% use WhatsApp;
- With regard to market share, Samsung at 33% has marginally greater market share than the iPhone at 30%, while Huawei has doubled its market share since 2018 going from 7% to 14%;
- As was also seen in the Com Reg survey, the Apple iPhone is most popular at younger ages, with a market share of 44% for those aged 18-24, compared to 26% for Samsung;
- 86% of those surveyed are concerned with how online companies share their personal data;
- Across Ireland, there are no significant gender differences in smartphone ownership. However, there are significant gender differences in smartphone usage that are relevant for communications and campaigns to drive adoption of a health-related app. Smartphone users check their phone on average, 50 times per day, although this is higher for females (54 times per day) compared with males (46 times per day). Overall, females use their phones for a lot more than males, and this is also the case for mHealth:
- Monitor fitness (e.g. steps, running) - 38% females and 29% of males;
- Monitor my health - 16% females and 15% of males;
- Monitor calorie intake and diet – 18% females and 9% males;
- Manage healthcare 14% females and 6% males;
- These findings are also consistent with fitness band (e.g. Fitbit) ownership (29% female, 19% male).

Ipsos MRBI (Year) 'The Right Click? Measuring Trust in Online Health Information' - A report, in partnership with MSD Ireland'

- 77% of those surveyed would visit a website if recommended by their healthcare professional;
- When it comes to visiting a health website, its source and ease of use are the top priorities for users;
- 91% believe it is important that a health website comes from a recognised medical source;
- 92% believe it is important that the content is easy to read and follow;
- There is an opportunity for a verified trust mark to indicate information is from a recognised, credible source;
- 82% believe it is important that a health website has a quality or trust mark that verifies it has been approved by a relevant nation body, as is the case in other countries[1];
- 73% are in favour of the introduction of a registered trust mark confirming that health information is from a recognised medical authority;
- When data is sub-analysed across demographic groupings, clear differences emerge. Certain groupings such as younger people and those from higher socioeconomic groupings are not only more likely to go online for their healthcare information needs, but also tend to do so more often;

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[1] For example, the Information Standard quality mark is an NHS certification programme for organisations whose main target audiences are in England.

- Almost two-thirds (65%) of younger people aged 18-34 have gone online for medical or healthcare information in the past year compared to just over one-third (37%) of those aged 55 and over. The younger cohort also tend to go online more often for such information, an average of 7.4 times per annum; and,
- In terms of social class, the ABC1 higher socio-economic group are also more likely to go online for health information (63% vs. 45% of the C2DE class), while females are marginally more likely to do so than males (56% vs. 51%). Some regional differences are also apparent, with those in Dublin (60%) the most likely to go online for health information.

Appendix

Methodology

Population-representative Survey Review

A search and review of population-representative datasets and surveys identified the following data sources relating to smartphone use in Ireland, and a further survey on trust in online health information which was deemed relevant to the central research questions. The search was restricted to the current year and last 2 years, for relevance. The sources are:

- CSO (2018) 'Information Society Statistics - Households';
- Commission for Communications Regulation (2019) 'Mobile Consumer Experience Survey of Consumers';
- Irish Longitudinal Study on Ageing (TILDA) (2018-2019) Wave 5;
- Deloitte (2019) 'Mobile Consumer Survey – Ireland' and,
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